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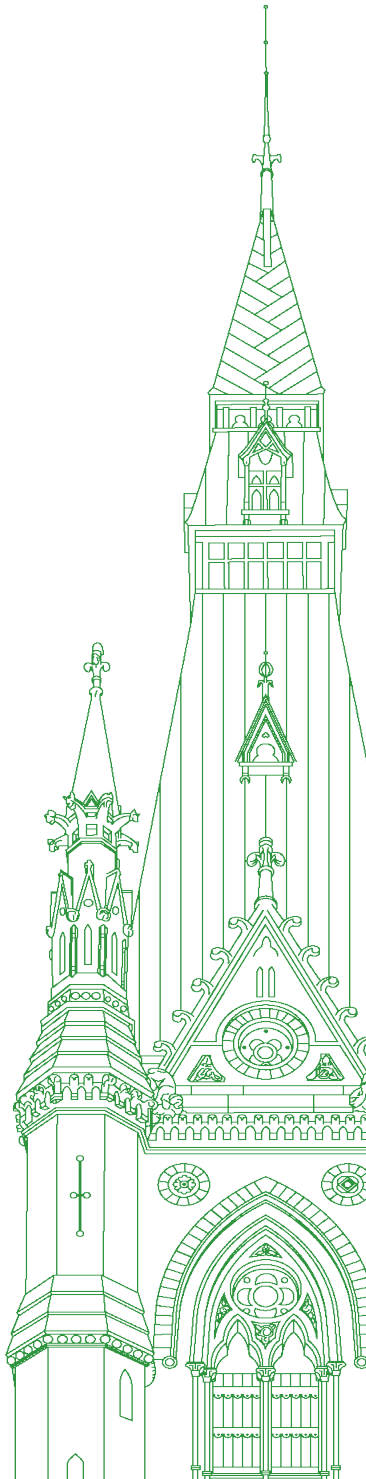
45th PARLIAMENT, 1st SESSION

Standing Committee on International Trade

EVIDENCE

NUMBER 052

Tuesday, November 3, 2026



Chair: Judy A. Sgro

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● (1545)

[*English*]

The Chair (Hon. Judy A. Sgro (Humber River—Black Creek, Lib.)): I'm calling the meeting to order.

This is meeting number 52 of the Standing Committee on International Trade. Pursuant to Standing Order 108(2) and the motion adopted by the committee on Tuesday, October 20, 2026, the committee is resuming its study of federal assistance for Canadian manufacturers' international trade activities.

I'd like to introduce our guests today. From the Aerospace Industries Association of Canada, we have Mike Mueller, president and chief executive officer.

Welcome, Mr. Mueller.

From Canadian Manufacturers & Exporters, we have Matt Conley, director, government relations.

It's great to have you all here. We will start with opening remarks and then proceed with rounds of questions from the members.

Mr. Mueller, I will start with you, please, for up to five minutes. If you see my hand go up, it means we're going to cut you off, so you should finish your statement. Thank you.

Mike Mueller (President and Chief Executive Officer, Aerospace Industries Association of Canada): Thank you, Madam Chair. I'll try to be within the five minutes.

It's a real pleasure to be here on behalf of the Aerospace Industries Association of Canada to offer some perspectives on this important study. It is key to highlight the fact that close to 80% of aerospace goods manufactured in Canada are exported to the international marketplace and that these exports support aerospace's contribution of $33 billion and almost 220,000 high-paying jobs to the Canadian economy.

I would like to start by highlighting the aerospace industry's broad support for the work of the government and all parliamentarians to support the growth of exports. Many of the recently announced free trade agreements, as well as those currently in the pipeline, are a positive sign for the aerospace industry. They clearly indicate the government's support and an understanding of the importance of export capability for a strong domestic manufacturing sector.

Within these trading frameworks, the concept of zero-for-zero trade for aerospace is a critical foundational requirement. In the decades since the World Trade Organization Agreement on Trade in Civil Aircraft was signed in 1979, global aerospace trade amongst its signatories has been tariff-free. This has provided a cornerstone for the rapid growth of aerospace manufacturing and has benefited the Canadian industry by supporting thousands of high-value jobs.

Aligning this call for zero-for-zero trade with all aerospace trading partners, we have advocated for ensuring that aerospace is not included in any countertariffs and for ensuring that aerospace is part of the remissions program on tariffs that were applied to steel and aluminum goods imported for use in aerospace and defence. Given the highly integrated and international nature of aerospace trade, any disruption or forced pivot in materials or parts sourcing could require years of adjustment for certification, security protocols and manufacturing processes. Such disruptions would drive significant cost increases and negatively impact both manufacturing and maintenance capacities in Canada.

I would also like to offer support for the CanExport funding program, which has provided aerospace small businesses with exceptional resourcing and opportunity to develop trading and business relationships in international markets. These trade missions and engagements open the door for Canadian companies to diversify their global supply chain strategies. We are also supportive of the additional resources that have been provided to the trade commissioner service and the renewed mandate of Canadian defence attachés to support the broad promotion of Canadian capabilities in international markets.

I would like to note a few areas in which improvement would positively impact aerospace in the global marketplace. Timely and predictable export permit approvals help companies secure contracts, meet customer delivery schedules and compete effectively with foreign competitors. Streamlining this permitting process can reduce administrative burdens, lower costs and provide greater certainty for businesses investing in innovation, production and workforce development. Faster and more efficient export approvals also support Canada's reputation as a reliable supplier of advanced aerospace technologies, helping to attract investments, sustain high-skilled jobs and expand economic growth. At the same time, modernization of export permitting can be achieved while maintaining rigorous national security and international trade compliance standards.

Another key consideration that impacts the competitiveness and diversification of aerospace in the global market is aircraft certification. Transport Canada is responsible for regulating and certifying Canadian aerospace products. Without certification, exports cannot happen. Our aerospace industry requires Transport Canada to be properly resourced and governed in a manner that matches the pace of innovation we are seeing within the industry. In this context, we are looking for budget 2026 to provide the resources needed to keep pace with innovation due to the defence industrial strategy's focus on dual-use technologies and the significant increase we see in innovation funding coming through that.

In closing, I would like to thank the committee again for the opportunity to appear here today. I look forward to discussing this further through your questions.

The Chair: Thank you very much.

Mr. Conley, go ahead, please, for up to five minutes.

Matt Conley (Director, Government Relations, Canadian Manufacturers & Exporters): Thank you, Madam Chair and members of the House of Commons Standing Committee on International Trade.

My name is Matt Conley, and I'm appearing on behalf of the Canadian Manufacturers & Exporters, representing 1.85 million workers, $208 billion in real GDP and a sector that has built this country's prosperity for over 150 years.

Canadian manufacturers are operating in an extremely challenging environment right now. Long-standing gaps in investment, productivity growth and technology adoption have significantly eroded Canada's manufacturing competitiveness. U.S. tariffs have only made it worse by disproportionately targeting manufactured goods, while repeated changes and continued threats have created persistent uncertainty.

The pain felt across the sector is real, and it's deepening across many parts of our membership, from the largest steel producers to the smallest fabricators and from automotive suppliers to consumer goods makers. These aren't just numbers on a page. These are factories. These are workers. These are communities. When it comes to federal assistance, we have to get it right. We don't get a second chance.

CME has long championed international diversification. We're encouraged by the government's ambition to expand Canada's export footprint globally. Canada has world-class products, and manufacturers are ready to share them with the world. However, we want to point out that our largest trading partner is and always will be the United States. We are encouraged that the Canada-U.S. talks continue and we urge the government to negotiate with patience, persistence and purpose to get the right deal.

Still, we see significant opportunities in diversification and markets that are ready to receive Canadian excellence. From defence and aerospace, where Canada's industrial capabilities are world-class and global demand is growing, to critical minerals, where the world is searching for a reliable, responsible, rules-based supplier, Canada has it. In advanced technology and in clean manufacturing, our industrial base is poised to lead the global transition. In consumer products, Canadian quality commands a premium far beyond its borders. The list goes on, and it's long.

● (1550)

[*Translation*]

Mario Simard (Jonquière—Hébertville—Pays-des-Bleuets, BQ): I have a point of order, Madam Chair.

[*English*]

The Chair: Mr. Conley, just hold on for a second.

[*Translation*]

Mario Simard: I'm sorry to interrupt the witness, Madam Chair. He just needs to slow down a bit to ensure that our interpreters can breathe until the end of the meeting. That's what I wanted to say. They're having an asthma attack over there.

[*English*]

The Chair: I know you're in a rush, but you have the time, so please just go a little bit slower.

[*Translation*]

Matt Conley: Thank you, Madam Chair. I'm sorry.

At Canadian Manufacturers and Exporters, or CME, we're very fortunate to have the entire national manufacturing value chain. We have the major steel producers and the smallest specialty manufacturers. We also have defence industries and manufacturers that come from family businesses. We're very proud of the diversity of our members.

Over 85% of CME members are small and medium-sized businesses. However, because of how diverse our members are, they don't always agree on the way forward. Some want stronger protections against foreign government-subsidized competition. Others rely on inputs that they can't find in the domestic market. Still, each of our members is united on one point: They want to build things together in Canada and share them with the world.

[*English*]

There is no shortage of support available to Canadian manufacturers looking to go global. The trade commissioner service has been proactive, engaged and thorough in reaching out to us and our members through this period of disruption, and we're happy to give them credit where credit's due. There are banks, consultants, freight brokers and trade specialists that have mobilized as well. We can see that the public and private sector ecosystems are ready to support manufacturers that are looking to go global.

However, manufacturers still need to see themselves in a business case to see the path forward. This is where we need governments to do the things that only governments can do. No bank can negotiate a mutual recognition agreement. No trade broker can align Canadian product certifications. No TCS officer, no matter how talented, can reform the regulatory equivalency frameworks that determine whether a Canadian product is commercially viable in an outside market. That's the government's lane, and CME is asking you to do the painstaking but critical work in our sector.

Our three asks are as follows.

First, reduce the red tape and work toward greater regulatory harmonization. Certainly trade deals help and we're happy to see that work done, but more needs to be done to help manufacturers build their business cases. One of my members put it plainly to me the other day. He said that standards are different, weights are different and certifications are different; that it's going to take months to be able to comply with all the different requirements and he knows we're already behind, but he knows we can catch up. This member is not short on ambition and he's not short on quality products, but he is short on regulatory alignment.

Second, we need to work harder toward a smarter global trade framework. I won't pretend to distill down the complexities of global trade into 20 seconds, but I would call on the government to protect, open and enforce. Protect where Canada produces, open markets where Canada can't and enforce where bad actors cheat.

Third, we need to build the infrastructure backbone that makes global trade real. There's no question that the measures found in Bill C-39 are stuff that the manufacturing sector supports. We look forward to and are cautiously optimistic about the implementation.

Thank you.

The Chair: Thank you very much.

We have Ms. Kusie for six minutes, please.

Stephanie Kusie (Calgary Midnapore, CPC): Thank you very much, Madam Chair.

Thank you very much to our witnesses.

Mr. Mueller, it's great to see you after all this time. We did a lot of good work together when I had the transportation file. It's always a pleasure to see you.

Mr. Conley, I'm going to direct most of my questions to you. It's nice to see you here today as well.

I want to start by talking about employment. Canada lost 68,000 jobs in September and about 42,000 jobs in the previous month, in August, resulting in a total of 110,000 job losses, effectively erasing any job gains that were made in 2026.

What impact did these job losses have on the manufacturing sector in Canada?

Matt Conley: For a lot of our members, it has been a challenge to retain their workers. Due to the pressures that we're seeing from the U.S., we're seeing a lot of those job losses, and any manufacturer I've talked to is trying to find a way to keep their workers close. Some have taken advantage of the work-sharing agreements, and it has worked for certain manufacturers, but it doesn't work for everyone.

I know the manufacturing sector is looking to grow, and they are looking at their domestic talent pool that's available, but it's a challenge, mostly because a lot of manufacturers don't know where their next customer is coming from, where their next order is coming from. It's a lot of uncertainty that we're feeling across the sector.

● (1555)

Stephanie Kusie: September was the first full month that we saw the U.S. section 338 tariffs take effect.

Can you describe the impact your members felt with those tariffs, and did they translate into job losses?

Matt Conley: Absolutely, I would imagine they did, and it certainly was reflected in the data we got from our survey. Of manufacturers affected by the 338s, there were a lot of new manufacturers that hadn't been affected by tariffs before, and so for many of those businesses, they needed to call up their brokers, to figure out which products and which SKUs from their business would be affected, and it has created a challenge.

We feel for the small and medium-sized businesses because they often don't have the legal team or the team behind them to be able to do it. When I talk to business owners, it's the CEO or the president who, instead of going out to make sales or grow their business, needs to become a tariff engineer overnight, and it's a challenge that's certainly hurting the sector.

Stephanie Kusie: I've talked to businesses across Canada that have felt the consequences of both 232 and 338 tariffs but also the consequences of Canada's countertariff measures. Have your members echoed that sentiment?

Matt Conley: Yes, for sure. Certainly, none of our manufacturers like tariffs from either side of the border, and it has been a challenge, especially with the countertariffs. We appreciate that there have been remission frameworks in place and a lot of those programs. We know finance is working as hard as they can, but the process is slow, and it can be challenging to know when people can expect their remissions back.

One example that one of my members gave was that he could see the bouncing ball above the questions, and he didn't question the due diligence. He agreed that those were the right questions. It just would have been nicer to have had a phone call, two hours and it could have been resolved instead of a few months of emails back and forth. We're working with finance on that. They're doing what they can, and I just hope we can move faster for those manufacturers.

Stephanie Kusie: Since tariffs became a reality in early 2025, how many jobs have been lost in the manufacturing sector as a whole amongst your membership?

Matt Conley: I don't have that number specifically, but from the stories we hear from many manufacturers, it's a challenge, mostly because they want to hang on to the people they have, and they try to find creative ways to keep things going and keep their businesses afloat. You see a bit of that kind of lagging indicator as businesses fight to hang on to their workers, but there's no question around it. It's a lot of anxiety.

Stephanie Kusie: In the absence of a deal with the U.S.—the Prime Minister's election promise—what impact do you foresee in the next six months in your sector as a result of the tariffs and no deal, potentially?

Matt Conley: It has caused a lot of members to look at what the future holds and what they're going to do in 2027, and a lot of manufacturers, depending on their size, depending on the outlook of their business, are making decisions based on that.

There was a bit of a sense among a lot of our members that a deal would be possible or that we would get to a deal. When that didn't happen, we saw a lot of members kind of take a deep breath and say, “Okay, let's look at our options.” That's where a lot of our members are, looking at those options.

Stephanie Kusie: Yes, that's right. It's not just politics. It has real-life implications.

We know from StatsCan that over 99% of Canadian manufacturers were micro, small or medium-sized in 2025. Does your membership reflect this high concentration of small and medium-sized manufacturers?

Matt Conley: Absolutely. Eighty-five per cent of our members come from the SME space, everything from craft beer to car couplings and everything in between. We're very proud of the diversity that our membership posts.

Stephanie Kusie: Have your small and medium-sized members had difficulties navigating the tariff-related programs? You touched on it a bit, but can you expand upon that, please?

Matt Conley: A lot of manufacturers don't often have the experience of dealing with government departments or applying for programs. It's not to say that they can't, but for a lot of them, it's just having that confidence and knowing where to go. Fortunately, they come to us, and we're able to point them in the right direction when we can. However, again, it's that uncertainty and that anxiety of just what comes next, and it has that chilling effect.

The Chair: You have 20 seconds left.

Stephanie Kusie: Okay. I'm seeing 24, but thank you.

How likely do you believe it is that small and medium-sized Canadian manufacturers will be able to expand into new markets outside of their already established U.S. trading relationship? How realistic do you think that prospect is?

Matt Conley: There's no question that the U.S. is always the easiest market because it's right on our doorstep. I know manufacturers want to be ambitious, but it won't be for everyone.

● (1600)

Stephanie Kusie: Thank you.

The Chair: Mr. Fonseca, go ahead, please.

Peter Fonseca (Mississauga East—Cooksville, Lib.): Thank you, Madam Chair.

Thank you to our witnesses, Mr. Mueller and Mr. Conley, for your opening remarks, statements and testimony.

I can tell you that in Mississauga, the Canadian aerospace sector has had a great deal of success. You speak to that success, Mr. Mueller: $33 billion GDP, exports of $28.2 billion in 2025, 80% of the goods exported. You're in 170 countries, just about every country around the world. That really demonstrates that Canadian manufacturers can compete successfully well beyond the U.S. market. The association has also recognized the importance of maintaining and strengthening our North American partnerships.

You know that our government is committed to doubling Canada's non-U.S. exports over the next decade. From the aerospace industry's perspective, how important is that ambition in encouraging companies in your sector to explore new markets and expand their international presence? I know you're already there. How do you expand that presence to help us achieve our ambitious goal?

Mike Mueller: Thank you for the promotion of the industry.

It's great to see, amongst all parliamentarians, the familiarity with and awareness of the incredible footprint of the aerospace industry. We're in every single region right across the country.

You referenced Mississauga. We're very proud. There are a lot of landing gear companies specifically in Mississauga contributing to the Canadian aerospace industry as well as to the industry and the supply chains right around the world, as you rightly pointed out.

As I indicated in my opening remarks, 70% to 80% of everything we produce is export-related. Access to international markets is incredibly important, and I would say the most important on that list is maintaining the zero-for-zero trading relationship we currently have through the 1979 WTO agreement on civil aircraft. That's our number one priority across the board.

As I also mentioned in my opening remarks, the CanExport program is incredibly important for those small and medium-sized businesses to access those international markets and to even get higher than that 70% to 80%. We're fully in agreement with the ambitious goal, especially through the defence industrial strategy, of doubling the exports. We feel we can contribute to that and be a part of that.

However, we need the support of the government to promote the industry in these international marketplaces through the trade commissioner service. We're also very pleased to see the policy tweak, if you will, enabling and empowering our defence attachés right around the world to promote the industry. There's no better signal to the international marketplace than when your own country is behind the products you are producing.

There is lots of opportunity out there, and there's a lot more work to be done.

Peter Fonseca: Let's look at things domestically. We're talking about investing in Canada and buying Canadian. We have our defence industrial strategy. It places a great emphasis on building Canada's domestic defence industrial capacity.

How important is it for Canadian aerospace manufacturers to have that stronger domestic market from which they can now develop and scale those opportunities and those capabilities to compete internationally? With these investments we're seeing in our industrial strategy here, in defence, what will that mean to the aerospace sector?

Mike Mueller: I always take a look at the outcomes. You have the defence industrial strategy and the build, partner, buy. Whichever way the government decides to go, because it's going to be different for each procurement, the outcome is critically important.

How do you empower and build that domestic supply chain for the aerospace sector? We feel that, through the defence industrial strategy and through signals such as the defence attachés, there is a renewed focus on supporting and promoting the domestic industry with a view for exports. At the end of the day, if we're not exporting, we don't have an industry.

When you take a look at the aerospace industry in particular, as I've often said before, there's no reason that a country of 40 million people should have the fifth- or sixth-largest aerospace sector in the world. It's because governments in the past have identified it as a strategic sector, supported it through different measures and encouraged that export internationally. It's incredibly important.

● (1605)

Peter Fonseca: Now I'll go to Mr. Conley.

Listening to that and knowing the innovation and the productivity that we want to see in all sectors, especially manufacturers and exporters, one of the government's priorities has been to encourage business to invest in productivity, enhancing machinery, equipment and technology.

How important are the new productivity mega deduction measures in encouraging manufacturers to make those investments?

Matt Conley: CME and the manufacturing sector are very happy to see them. They are exactly the types of measures that we've been looking for, mostly because they provide certainty to the manufacturer that they know that this is what's available, how the program works and that they can access it.

At the moment, we're still waiting on feedback from our members to determine what the uptake is and where any of the friction points are, but we were happy to see it, because that's exactly what manufacturers have been looking for.

Peter Fonseca: Thank you, Madam Chair.

The Chair: Thank you.

Mr. Simard, go ahead, please, for six minutes.

[*Translation*]

Mario Simard: Thank you very much, Madam Chair.

Before the clock starts, I just want to make sure that my friends can hear the interpretation clearly, that they can hear the interpreters' pleasant voices rather than my rough regional voice. There we are; that's good.

What my colleague Mr. Fonseca just said was very interesting. I'd like to continue in that vein, Mr. Mueller. You know, particularly in the aerospace sector, the buy Canadian strategy largely involves aluminum processing.

Earlier today, I was at the Standing Committee on Government Operations and Estimates with Jean Simard, who represents the primary aluminum smelters. You know, they produce 3.3 million tonnes of aluminum, particularly in my region, Saguenay—Lac-Saint-Jean. However, that aluminum isn't processed. The aluminum sheets you use in your sectors come from the United States. We're the major aluminum producers in the supply chain, but we're dependent on the Americans, because we don't have the necessary infrastructure that would allow us to make aluminum sheets, namely, a rolling mill. We have a few extrusion plants, but perhaps not enough to meet our expectations.

You said earlier that we need to see the results. Indeed, we have to look at the results. How is it that we're the leading aluminum producers in North America, that we supply the Americans, but that we're unable to be independent in this particular sector? That makes no sense to me. We should have the capacity to produce our own aluminum sheets to meet your sector's needs.

My fear—I'll tell you this, and I'll let you answer afterward—is that there's a lot of talk about critical minerals. Critical mineral sectors are going to be developed, but will we still be the people doing primary processing without being able to rely on added value and without securing the supply chains? We're currently seeing what that can do.

I'm going to put the question to both of you, Mr. Mueller and Mr. Conley. I know I'm taking too long with my questions, and I apologize. I'm wondering what that might mean for your specific sectors, the aerospace and manufacturing sectors.

[*English*]

Mike Mueller: You and all parliamentarians show strong support for the aerospace sector.

You're absolutely right to identify critical minerals and the capacity for these types of facilities, in particular, aluminum. It's something that we've taken a look at. We've done some analysis working with the government on the issue with aerospace in particular.

There are very long timelines, and you mentioned capacity and capability. We have the capacity here in the country, but aerospace, in particular, has very low volumes, high certifications, very high material mixing and smelting and everything that goes into that. It's a long process to move some of these supply chains, which is again why we keep talking about the need for that zero-for-zero trade, but there is an opportunity, as you mentioned. We're encouraging the government to also take a look at that and provide a bit of help to shift some of that production because of some of the high-cost barriers with aerospace.

[*Translation*]

Mario Simard: Just before I give Mr. Conley a chance to answer the question, I'd like to talk about the studies you just mentioned. If possible, can you submit something to the committee in connection with that, which could perhaps inform the report we'll be producing? We would be very grateful, Mr. Mueller.

Matt Conley: Thank you for the question.

There's something we often see among many of our members, and that's why we're proud of the diversity of our members. We have large companies that, of course, produce many products, and they need to be protected. We also have many small manufacturers. What they need to manufacture their products isn't produced by the big companies. In other words, if it's steel or aluminum, they don't always need the same type of products. That's why it's a challenge. Of course, it's important to protect our industrial capacity. We want to maintain that. However, small manufacturers need to have the opportunity to establish partnerships with allied countries and with countries that can send these manufacturers the products they need, in a fair way that falls under free trade.

● (1610)

Mario Simard: Thank you, Mr. Conley. I'm going to ask you about something else, but I may not have time to finish.

We have a trade crisis. That goes without saying; everyone is very aware of that. However, there's a major problem affecting the manufacturing sector, particularly in Quebec: the issue of temporary foreign workers and related challenges, with immeasurable delays.

I don't know if I have much time—Madam Chair can let me know—but I'd like to hear what you have to say about this, and I'd like to know if you have any recommendations for the committee.

Matt Conley: The majority of my members want workers who can come to Canada and who have the necessary skills, and they want to be able to keep those workers for a longer term. Manufacturers often use the temporary program because it's the only way they can recruit that staff.

What we're recommending to the government is a program for people who need something temporary. It has to be very clearly defined and very specific. Manufacturers should also be allowed to employ the workers they need with the skills they can't find here. Manufacturers are turning to immigration, schools and domestic employees. It's like tools in a tool box; everyone has their own needs.

[*English*]

The Chair: Thank you very much, Mr. Conley.

We'll go to Mr. McKenzie, please, for five minutes.

David McKenzie (Calgary Signal Hill, CPC): Thanks to both of our witnesses for being here.

Mr. Mueller, I believe you testified before the defence committee back in the spring of this year, about six months ago. At that time, you spoke about the need for procurement reform and in particular a speedier procurement process. This is in respect of the area of national defence. I'm wondering if you can update us. Have you seen improvements in the last six months in these areas?

Mike Mueller: I'm going back to what I'd said six months ago, but I think it's consistent with what I'll say now.

We're starting to see the vision of the government for speedier reform, which we're very supportive of. We have legislation before the House on the Defence Investment Agency. We're supportive of that piece of legislation.

In my view, we still need that legislation in place in order to drive that policy and regulatory reform, because at the very high level, we have the vision, which is correct, but we haven't seen that speediness translate down to the working level quite yet. I do believe that once we have the legislation, it will give the ability to work with industry and make sure we get some of these things out a little bit quicker.

David McKenzie: I appreciate your optimism, but right now the report card says that it's a work in progress, at best. Is that fair?

Mike Mueller: I would agree with that. I think the vision is right. It's a work in progress. It's work we're supportive of and want to be a part of, to make sure that we get the outcomes for industry that are required.

David McKenzie: I also want to touch on the export-permitting process. I think that's something else you've talked about before.

Can you elaborate a little bit as to the importance of that? What needs to be changed? That sounds to me like something the government can do. It's not dependent on international parties or other governments.

Mike Mueller: We've been a big advocate of what can we control here in the country on the trade side. There's a lot of noise going on internationally. We pay attention to that, obviously, but it's what we can control.

Export permitting is a source of frustration for the industry. We do have some recommendations with respect to how to reform that process. With aerospace being so export intensive, having the clarity on the export-permitting process going in is absolutely critical. The clarity and the consistency of the application is needed. For timing and service standards, we see timing all over the place. It's very hard for industry to manage that process. On the transparency piece, where are you within the process on the export permits? It's greater transparency.

We're recommending a review of the process and the program to make sure it's responding to industry.

It seems to go in waves. We seem to have issues and then everything's working smoothly. We seem to be in a smooth period right now, at least from what I'm hearing, but I do think there are some fundamental program changes and tweaks that need to happen.

● (1615)

David McKenzie: I'm sure that, just as you're providing your testimony and information today to this committee, your association is otherwise in contact with the government.

Is it that we're quiet for a while and then we talk, and then it's quiet for a while and then we talk? Does that apply to nature of the conversation?

Mike Mueller: I'm sorry. I should clarify.

There's a lot of talking going on. It's the timeliness piece. When it comes to my level, we seem to be having an issue, and companies are saying that it's been too long.

It seems to be working right now. Again, it's very dependent on things other than the process. Focusing on the process is really what we've been talking about for a number of years now. It's a long-standing request and recommendation from the industry.

David McKenzie: I understand.

There's been a lot of talk about a new status for Canada in relation to the EU, and that would be associate membership. Would your members welcome that?

Mike Mueller: I think the devil would be in the details.

David McKenzie: That's an expression I use often.

Mike Mueller: Overall, any increased access for our manufacturers to our international marketplace is a positive piece. I've seen some positive news coming out of that.

David McKenzie: If that came with an increase in regulation, would that be a positive?

I appreciate that you might have to balance those two things, but it's one thing we can count on if our relationship with the EU is deepened.

Mike Mueller: The aerospace sector in particular isn't shy about regulations. We thrive on that certification framework, so I think greater alignment on regulatory issues internationally would be a benefit to us.

I think you'd need to take a look at it from an international perspective rather than as two countries or as a trading bloc and Canada. We want to make sure that we're compliant everywhere, including the U.S.

The Chair: Thank you, Mr. Mueller.

Ms. Lapointe, go ahead, please, for five minutes.

[*Translation*]

Linda Lapointe (Rivière-des-Mille-Îles, Lib.): Thank you very much, Madam Chair.

I would like to welcome the witnesses and thank them for being here today.

For your information, my riding is located north of Montreal, just south of Mirabel. Mirabel plays a big role in aerospace. My riding has Nova Bus, which is a company that builds buses. There's a whole supply chain there, both in the transportation sector and the aerospace sector. It's very prevalent in my riding.

Mr. Mueller, our government obviously supports Aéro Montréal, which you must be familiar with. You spoke earlier about the defence industrial strategy, which is very important. For a small supplier in my region, in Quebec or in Canada, what barrier remains the most difficult to overcome when trying to secure a first contract to enter a supply chain, whether in aeronautics or the transportation sector?

I'll start with you. Mr. Conley can then answer the question.

[*English*]

Mike Mueller: Absolutely, Montreal, Mirabel and Laval are an aerospace hub. There are a lot of amazing companies there.

I don't think there's one particular item that companies need. In general, in order to take advantage of new opportunities, I always encourage companies to.... Number one, showing up is 80% to 90% of life, so make sure that you're there, connecting with groups like Aéro Montréal at the events that are going on. It's absolutely critical for them to take advantage of the international piece through programs like CanExport that the government runs. Knowledge, relationships and being there, at the end of the day, are what matter in business, especially in aerospace. Also, be very strategic, identify some of the opportunities and then leverage all of the points there that can benefit that.

On the civil side, we have huge opportunities for some of the programs and the exports that are attached to that. On the defence side, again, there are some major procurements by the federal government that are coming forward. You have ITB offsets and opportunities there.

There are opportunities everywhere, but you need to get involved. You need to show up. You need to identify the requirements. Then, from there, of course, there could be different cybersecurity requirements and AS9100 management requirements, as well as Transport Canada certification, but you can't get to that point unless you identify what the opportunities are.

● (1620)

[*Translation*]

Linda Lapointe: Mr. Conley, do you have anything to add?

Matt Conley: Yes, of course. Thank you for the question.

When the government announced the strategy, manufacturers expressed an interest in taking part. At Canadian Manufacturers and Exporters, we have created a program called CME defence.

The program has two components. The first is an operational component that helps businesses understand what certifications they need to get and what standards they need to meet. The other component concerns the work of lawyers, particularly to ensure that businesses have access to contracts.

A number of meetings were held across the country, including 11 in Montreal, Halifax and Calgary. We invited small and large manufacturers, some already well established in the defence sector and others just curious about getting involved.

Of course, many people want to participate. We do our best to show them what they need. We're encouraged, but there's still a long way to go before these manufacturers, who are curious, can integrate into the value chain.

Linda Lapointe: What you offer your members is very interesting. Thank you very much.

Mr. Mueller, earlier—

[*English*]

The Chair: Ask a short question, please.

[*Translation*]

Linda Lapointe: Okay.

Mr. Mueller, you referred to export capacity earlier. What were you referring to in your opening remarks?

[*English*]

Mike Mueller: I believe it was the CanExport piece. It's critically important, on the CanExport side, to make sure that small businesses, in particular, can seize the capacity that they have with respect to international trade. I think that's what I was referring to.

[*Translation*]

Linda Lapointe: Thank you very much.

[*English*]

The Chair: Thank you very much.

Next is Mr. Simard for one minute.

[*Translation*]

Mario Simard: Not much can happen in a minute. I'll just ask the question, then.

Mr. Conley, beyond the countertariffs, which may be frustrating for people in the manufacturing sector, the government has announced some liquidity access projects, in particular the BDC's pivot to grow program. Since I know that it's very difficult to access that in the forestry sector, I'm wondering how it's being received in the manufacturing sector.

Are the criteria for applying in line with people's expectations? Have any of your members or any people you know in the industry had access to the famous pivot to grow program?

Matt Conley: I know that some of our members have received funding, but there's still a great deal of friction. We have some members who are receiving it and some members who aren't.

We're doing our best to contact the government, to tell them which members are not receiving it and ask them why. We're asking if it's because more information needs to be provided, but it's difficult.

Mario Simard: In particular, I would like to know which criteria are making it so that some are refused while others manage to get support.

Since we won't have time to discuss this more, would you be able to provide the committee with some information on the criteria that's preventing people from qualifying for the famous pivot to grow program, particularly people in the manufacturing sector?

Matt Conley: Yes—

[*English*]

The Chair: I'm sorry, Mr. Conley. If you could supply the committee with that information that Mr. Simard was referring to, it would be appreciated.

[*Translation*]

Matt Conley: Of course.

[*English*]

The Chair: I'm trying not to go too far off. We have other witnesses waiting.

Next is Ms. Jansen for four minutes, please.

Tamara Jansen (Cloverdale—Langley City, CPC): Mr. Conley, more than three-quarters of Canada's manufactured exports go to the United States. Now, that's an enormous dependence on one market. If Canada fails to secure a stable trade agreement with the Americans, what does that actually mean for Canadian manufacturers?

Matt Conley: It certainly creates a lot of anxiety for the sector. As mentioned in my remarks, we recognize that Canada's biggest trading partner will always be the United States. It's something that a lot of manufacturers are always looking for because we value our relationship with the Americans. The sooner we can we can get back to a sense of certainty, the better.

Tamara Jansen: Could your membership wait two and a half years, like the Prime Minister has been saying that he's prepared to wait?

● (1625)

Matt Conley: It depends on the size of the member. Certainly, the smaller you are, the fewer resources you have, and we have the most concern about those that don't.... It would create a lot of hardship across the sector—there's no question.

Tamara Jansen: The Prime Minister wasn't speaking on their behalf, then. That was his own idea—that we could handle waiting two and a half years.

Matt Conley: I certainly wouldn't speculate about what the Prime Minister was saying there.

Certainly, there is a resilience in the manufacturing sector, and everyone will do what they can, but it will be very hard on a lot of manufacturers if something can't be reached with the U.S.

Tamara Jansen: Your organization's survey found that “73 per cent of manufacturers believe failing to secure a full...renewal of CUSMA would [hurt] their business[es]”. How long can these companies keep operating under this kind of uncertainty before they're forced to start laying off workers, cutting production or moving operations south of the border?

Matt Conley: Certainly, if you're a smaller manufacturer, you measure a lot of that in months because you're limited to the resources and customers that you have. Some have a bit more time, but certainly, whether you're big or small, you are seeing the impacts of it, and you're making decisions to recalibrate your supply chains and then change your decisions. However, there's no question that there are a lot of hardships that the manufacturers are facing.

Tamara Jansen: Mr. Mueller, when we last met at committee, you mentioned that you were comfortable with a Crown corporation instead of the DIA, as long as it delivers what manufacturers need.

I'm wondering if you're aware of what the Parliamentary Budget Officer has just reported: Over the next five years, the federal government is projecting $333 billion in deficits, but a staggering $733 billion in actual borrowing. That's a $400-billion difference. Much of that difference comes from loans to Crown corps and other investments that don't show up on the deficit.

Do you think Canadians should be concerned about whether there's enough parliamentary oversight, transparency and accountability when we're talking about that much borrowed money going into a Crown corp instead of the DIA?

Mike Mueller: As I mentioned, I think, at the last meeting, we are supportive of that framework as long as we get the results for industry. We talked a lot about the procurement side of things. I would say that my message would be the same on the broader accountability pieces. We're supportive, as long as that accountability is there. It's a bit broader than my area of expertise on that. It's not that I'm an expert on procurement, but—

Tamara Jansen: That's a lot of billions going into a Crown corp that we won't be able to see into.

Mr. Conley, we keep hearing about the importance of diversifying our trade and, of course, we want to see Canadian businesses succeed in a new market. Many of our manufacturers don't sell to the U.S. They're part of the same North American supply chain. Can those businesses realistically replace their American customers with customers overseas?

The Chair: Give a brief answer, Mr. Conley.

Matt Conley: It depends on the product. Certainly, some won't be able to, though the ones that can, will. Either way, it creates a whole chain of uncertainty and challenges across the supply chains.

The Chair: Thank you very much.

Ms. Acan, you have four minutes, please.

Sima Acan (Oakville West, Lib.): Thank you, Madam Chair.

Mr. Conley, do you think Canada should take any deal with the United States no matter what the cost will be for us?

Matt Conley: Certainly, I think there are bad deals and things that would be punitive for the sector, so I would say that manufacturers would wait for the right deal.

Sima Acan: Thank you so much.

Thank you, Mr. Mueller, for joining us today, and both of you for your leadership in your areas.

Mr. Mueller, I also thank you for your leadership in promoting Canada's aerospace industry.

It was a pleasure to spend time with you at the Farnborough International Airshow this summer. What struck me was the attention that Canada was receiving. There was a strong interest in what our companies have to offer, including those from my own riding of Oakville West.

The Canadian Pavilion brought together impressive Canadian expertise, innovation and talent and provided a valuable opportunity to connect with international customers and partners. That interest represents a real opportunity to diversify our exports, attract investment and create skilled jobs here at home, building on work that our government is already doing to support Canadian companies and expand access to international markets.

You briefly mentioned this in your opening remarks, but can you elaborate on this? From your perspective, what would help Canadian aerospace companies turn that international interest into contracts and lasting partnerships? Also, where can the federal government make the greatest difference?

Mike Mueller: Thank you for your support for our industry at Farnborough. I know you were there. Other parliamentarians were also. Off and on from all parties over the years, we definitely do appreciate that support.

You're right. The Farnborough air show, the Paris Air Show and some of these marquee events really provide that opportunity for Canadian industry to showcase their talents and expertise.

I would say that specifically what the government can do to help support—or what can we do collectively—is, one, ensure we have the promotion and support from the government and all parliamentarians to showcase the industry. As you saw at Farnborough, the increased attention is amazing, in particular on the defence industrial strategy. When I talked to my counterparts, they were talking about it. The renewed focus the government is bringing to defence and the industry and to identifying aerospace in particular as a strategic industry in that regard is incredibly positive.

Keep doubling down on programs like CanExport. Keep doubling down on ensuring that the trade commissioner service is supporting the industry. We appreciate their support. Again, it's about having the defence attachés out there talking about the industry and, in particular, making sure that all the supports are there.

● (1630)

Sima Acan: My next question is about federal export supports, including trade commissioner services, that help with foreign buyers and are available to aerospace firms. The government already has a direct role, as you mentioned, in how these supports are designed and delivered. Which of these federal export supports do your members find most helpful?

Mike Mueller: It depends on the company, the size of the company and the markets they're chasing. A larger multinational OEM based in Canada would have a different view of that from the small and medium-sized businesses that would need a sort of boutique help.

I think that if you're the larger business, that broader promotion of the industry is absolutely critical. Those policies identifying aerospace as strategic and providing contracts to companies are absolutely critical. The small and medium-sized businesses can use CanExport programs, allowing them to get out to these different opportunities with some of the boutique services the government is offering.

● (1635)

The Chair: Mr. Mueller, I have to interrupt. I'm sorry.

Thank you to our witnesses.

We started late and we have another group of witnesses waiting.

We will suspend for a minute or so.

● (1630)

_____(Pause)_____

● (1635)

The Chair: I call this meeting back to order.

We have with us now, from the Canadian Association of Moldmakers, Nicole Vlanich, executive director. From Next Generation Manufacturing Canada, we have Jayson Myers, chief executive officer. From the Pacific Manufacturing Association of Canada, we have Brendan Sweeney, president and chief executive officer.

I need to remind witnesses that committee members may ask questions in either French or English. If you need interpretation, please put your headpiece on, and keep it on so that members don't lose their time in translation as we move forward.

I will start with Ms. Vlanich.

You have an opening statement of up to five minutes. If you see my hand go up, it means please end your presentation and we'll move forward.

Ms. Vlanich, the floor is yours.

Nicole Vlanich (Executive Director, Canadian Association of Moldmakers): Thank you, Chair and members of the committee, for the opportunity to appear today.

I'm Nicole Vlanich, executive director of the Canadian Association of Moldmakers.

Our members build the tools that make manufacturing possible. They are the people who make things that make things. Canadian mould-makers are internationally recognized for their quality, expertise and technical capabilities. They compete successfully against suppliers from Europe, Asia and the United States. Some of our members export up to 90% of their production to the U.S. They've earned that business through decades of investment, innovation and customer relationships.

Our companies have proven they can compete. What they cannot price into a contract is uncertainty without an end date. Companies quote projects, purchase materials and commit employees months before delivery. When tariffs change after those commitments, a profitable project can become a loss. Some customers require delivered duty paid pricing, leaving Canadian suppliers responsible for unexpected tariff costs. Even customs brokers are struggling to interpret changing requirements.

Manufacturers need clear guidance and reliable answers. These challenges are compounded by rising costs, delayed customer decisions and growing pressure on cash flow.

That brings me to federal assistance. We appreciate the government's engagement and the support measures announced, but there is a difference between announcing assistance and ensuring that it reaches the businesses that need it. For manufacturers already experiencing financial pressures, eligibility requirements, application complexity and processing times matter.

On diversification, I want to be clear. Our members have participated in international trade missions and trade shows for years. They are experienced exporters actively pursuing opportunities, but overseas markets cannot realistically replace their established American business. They face intense competition from lower-cost countries and established European manufacturers.

Entering new industries, developing new customers, meeting qualifications and securing contracts take time. For example, one of our members is six months into the process of entering the defence industry and still anticipates it will be at least another 18 months until they are able to even begin seeking contracts. Diversification is a growth strategy, not a replacement strategy.

Federal assistance should recognize that maintaining existing export relationships is just as important as developing new ones. We also need to recognize what Canada stands to lose. Recent supply chain disruptions demonstrate the importance of maintaining critical manufacturing capabilities close to home. Canadian mouldmakers invest in automation, advanced technologies and workforce development, yet Canadian tooling orders continue to go to lower-cost overseas suppliers.

When public dollars support manufacturing investment, Canadian tooling suppliers should have a meaningful opportunity to compete for that work. We are not asking for guaranteed contracts. We are asking for a fair opportunity to compete.

The workforce consequences are equally important. Our companies have spent decades developing skilled employees whose expertise cannot easily be replaced. During recent school visits, I've heard concerns from students, parents and teachers about whether manufacturing careers offer a stable future.

While the United States is encouraging manufacturers to establish operations there, Canada should be working as hard to retain these companies as the United States is to attract them.

Direct engagement with manufacturers is important. Windsor-Essex companies are often among the first to feel changes in U.S.-Canada trade conditions, and the impacts can be significant. We are hearing similar concerns from manufacturers in the greater Toronto area.

Our members would welcome the opportunity to host the Prime Minister and federal ministers at their facilities to see first-hand their capabilities and the risk, and to hear directly about the challenges they are facing.

I want to leave the committee with three recommendations.

First, restore predictable and competitive access to the United States. Prioritize a stable trade agreement.

Second, make federal assistance faster, simpler and more accessible.

Third, support the retention and competitiveness of Canadian manufacturing.

Financial assistance can provide breathing room. It cannot replace predictable access to customers. Our members are doing their part. They're pursuing opportunities, developing their people and investing in their businesses. They need the government to establish the conditions that allow those efforts to build a future here in Canada.

Thank you.

● (1640)

The Chair: Next is Mr. Myers, please.

[*Translation*]

Jayson Myers (Chief Executive Officer, Next Generation Manufacturing Canada): Thank you, Madam Chair.

[*English*]

It's nice to see you again.

I want to start off by introducing NGen, Next Generation Manufacturing Canada. We're a not-for-profit, industry-led organization dedicated to building advanced manufacturing capabilities in Canada. We do that by raising funds from public and private investors to invest in collaborative projects that integrate technology companies with manufacturers and research organizations to develop really innovative and new advanced manufacturing processes here in Canada.

We also support the development of IP commercialization strategies for those members. We've led, over the last five years, Canada's industry presence at the world's largest industrial technology show, the Hannover Messe, where we've introduced over 500 Canadian companies to potential customers and innovation partners. This has led—because we track this—to over $400 million in sales.

The first thing I'd like to say is that many Canadian manufacturers are already diversifying their markets. From the beginning of 2025 to August 2026, manufacturing sales were up by about 8.5%, in spite of the fact that our exports to the United States were down by close to 5%. Our sales to domestic customers increased by over 18%, and our sales to countries outside the United States were up by over 20%, particularly to Europe, Mexico and China. Many companies are diversifying their trade and their customers and growing into new markets.

I'd like to say, too, advanced manufacturing is really key to the success of trade diversification for companies. Whether it's adopting new technologies to be competitive in new markets, to meet new customer demands, to meet new standards and regulatory requirements, to process the critical minerals that we need to sell to the rest of the world or to develop the production systems required for new defence products in Canada, it's going to be advanced manufacturing capabilities that actually enable that.

The second thing I'd say is that I see across this country a wealth of small companies that have developed new technologies and new advanced manufacturing capabilities, and our ability to get those to the rest of the world, I think, offers a tremendous opportunity for growth.

The third thing I'd say is that the business of manufacturing is changing. Every product and every piece of equipment is potentially a data platform today. How companies use that data to generate services is really going to differentiate the companies and create a lot more value and a lot more business opportunity. Manufacturers in Canada already derive about 25% of their revenue from services, not just from getting product out the door.

My key point is that trade diversification is an innovation challenge. It's all about identifying business opportunities. It's about identifying the market conditions that allow successful entry. It's about identifying the standards and the regulatory requirements to enter markets and the freedom to operate to go into new markets.

Trade diversification strategies may differ by product, by service and by company. They could be direct exports or, depending on delivery times and transport costs, they could also be sales to multinationals operating here in Canada or engineering companies in Canada that can integrate products and sell them to the rest of the world. There are many different channels to market that companies need to figure out.

I think we have tremendous trade development services here. The trade commissioner service and EDC are two really good examples. They focus on companies that are export-ready. I think there is a gap here. We also need to look at companies that are not. What do they have to do to become export-ready?

The second thing is that trade diversification depends on the adoption of new technologies. It depends on scaling up here, and this is where our innovation programs come in. Our innovation programs tend to focus on early-stage R and D and early-stage tech start-ups, but not so much on connecting those technology companies with the manufacturers here in Canada or internationally that could help them grow their business.

● (1645)

We need greater synergy and greater coordination between our innovation programs and our trade development programs.

Thank you.

The Chair: Thank you very much.

Mr. Sweeney, go ahead, please.

Brendan Sweeney (President and Chief Executive Officer, Pacific Manufacturing Association of Canada): Good afternoon. Thank you for inviting me to contribute to this important study.

The Pacific Manufacturing Association of Canada, or PMAC, represents Japan-based automotive manufacturers with operations in Canada. These include the two largest automotive manufacturers in Canada, Honda and Toyota.

Together, Honda and Toyota assemble more than 900,000 vehicles in Canada annually, representing 77% of total Canadian vehicle production. They export approximately 80% of those vehicles to the United States, with virtually all of the remainder being sold in Canada. They are the largest consumers of Canadian-made automotive parts. They are the largest importers of automotive parts from the United States. Honda and Toyota are also the largest exporters of automotive parts from the United States to Canada. They are the largest consumers of Canadian-made steel. They manufacture nearly three vehicles for every one that they sell in Canada. They continue to operate five award-winning Canadian assembly plants at full capacity while launching new electrified vehicles, and they've never laid off permanent employees. Moreover, Honda and Toyota rely on a network of more than 40 Japan-based automotive parts manufacturers in Canada, which, together, represent about one-third of the parts manufacturing industry. Suffice it to say that Honda and Toyota represent the foundation of automotive manufacturing in Canada today.

PMAC members have developed competitive advantages relative to their counterparts in sibling assembly plants in the United States. Those competitive advantages are related to the productivity and the quality of Canadian assembly plants, a testament to the excellent manufacturing workforce in Canada and to efficient and integrated trade networks facilitated by agreements such as CUSMA and CPTPP.

There are currently limited opportunities to export vehicles manufactured at scale in Canada to markets other than the United States. Other large vehicle markets in Asia, the EU and South America are well served by existing automotive production networks. Market-based automotive manufacturers in all those regions face mounting competition from non-market manufacturers. There's little appetite for more competition from North American imports in those regions. Negotiating a trade agreement with the United States that reduces the effective tariff rate on vehicle exports in the short term and that establishes a pathway back to tariff-free trade and automotive products is, and should remain, the highest priority for the government.

CPTPP supports our members' assembly operations in Canada through the duty-free import of automotive parts and components that are not manufactured in North America, including the electronics and battery materials used in the production of electrified vehicles. This is important for our members, considering that a majority of the vehicles they produce in Canada are electrified. As a country that signs agreements in pen, we should continue to honour the CPTPP.

Any agreement that provides non-market automotive manufacturers that—unlike our members—have made no investments in Canada with privileged access to the Canadian vehicle market should be reconsidered.

The most effective way the federal government can support the next generation of automotive manufacturing in Canada is to negotiate a trade agreement with the United States that reduces the effective tariff rate on vehicle exports in the short term and establishes a pathway back to tariff-free trade and automotive products throughout North America, while honouring existing trade agreements freely negotiated with other market-based countries.

At the same time, the federal and provincial governments should work together—and we understand they are working together—to improve the competitiveness of automotive manufacturers in Canada. This includes, but is not limited to, eliminating interprovincial trade barriers, such as ZEV mandates, and providing relief to the manufacturers bearing a disproportionate tariff burden today.

Thank you. I look forward to further discussion.

● (1650)

The Chair: Thank you very much.

Ms. Borrelli, go ahead for six minutes, please.

Kathy Borrelli (Windsor—Tecumseh—Lakeshore, CPC): Thank you, Chair.

Windsor-Essex is recognized as the mould-making capital of Canada, bringing in an estimated $2 billion in annual economic activity for the region. Almost 150 mould shops employ almost 5,000 workers, who have extremely highly advanced skill sets, and that's why I'm so pleased to question Nicole Vlanich, who is president of the Canadian Association of Moldmakers.

Nicole, welcome here today.

First of all, I've had the opportunity to question you before, at the industry committee, when you appeared to represent your organization in regard to the urgent study that we did on the 338 tariffs. I know that you've testified before the Senate on similar factors as well.

As you know, and as you are always speaking about, the implementation of new tariffs has placed the Windsor-Essex mould-making cluster under severe economic strain, because up to 95% of the production from the mould shops goes to the United States. Things have been very difficult for the mould-makers, the owners of the companies and the workers who are there.

What can you say about how new trade opportunities and diversification in Europe could replace the opportunities we have in the United States? Is that a possibility? Also, how long would it take for companies to pivot to supply defence, which would also be another pathway in the future?

Nicole Vlanich: To give a little bit of information about our industry, before a tool is delivered, the company has to find a customer, qualify, win the order, design, build and test it. The biggest uncertainty in securing work overseas is doing all of that: winning the agreement and then being able to do maintenance and everything that comes in after dropping off the tool. It's not just dropped off and walked away from.

Our members have diversified into different countries for a number of years. As I said in my opening remarks, they've gone to trade shows and trade missions all over the world, and they continue to do so. They explore international opportunities as often as they can.

They face even greater competition in overseas countries from European manufacturers and manufacturers in low-cost countries in Asia. It's not realistic to think that 90% or 95% of their business is going to be replaced at all, let alone, I would even say, a number such as 5%. It's just not reasonable due to the fact that they've already been in those markets. They continue to explore those markets, but it's even more competitive there than it is here in North America.

In terms of the timelines, it differs with each company. One company I cited as an example is already six months in. There's another at least 18 months out to diversify into a new industry.

When we're looking at diversifying into different markets, that's unpredictable as well. With their customers in the United States, they've built those relationships over generations. These are oftentimes, for our members, family-owned businesses that have been passed down from generation to generation. The relationships they're maintaining were developed by their grandfathers many years ago. It's not something that was done overnight.

● (1655)

Kathy Borrelli: The amount that our mould-makers have been able to sell to the United States is limited now due to the tariffs, and they're economically stressed. How successful have your members been in accessing the emergency funds that have been made available? Has that been an easy application process? Have they been receiving cheques from the government? It's supposed to be an urgent response. Here we are, six or seven months later. How many of these companies have actually received funds from those pockets of money that were made available?

Nicole Vlanich: Our association and our members appreciate the efforts, the support and how quickly the government acted on the previous testimony I gave in that study. It was very fast, but the turnaround time from applications is over six months. Our members applied about seven months ago and just started getting responses in October, one here and one there.

We have members that have been waiting as long as 10 months. Prior to the changes that were made to the program, they had applied. When we're looking at "urgent" financial support, six months, seven months or 10 months isn't urgent. It's not meeting the need that it was presented to meet.

The Chair: Thank you very much, Ms. Vlanich.

We'll go on to Mr. Lavoie, please.

[*Translation*]

Steeve Lavoie (Beauport—Limoilou, Lib.): Thank you, Madam Chair.

Thank you to the witnesses for being with us today. It's always nice to have them here.

Mr. Myers, your organization's mission is, of course, to strengthen the competitiveness of the financial sector through innovation, industrial research and the adoption of advanced technologies, such as artificial intelligence. I read that you fund collaborative projects in robotics, automation and 3D. What you're doing is really very interesting.

I'd like us to talk a bit about artificial intelligence, and you'll see why. In the report on Canada's monetary policy that was tabled a few days ago, artificial intelligence is seen as an important driver of investment for businesses and production in the coming year, just like the current mega deduction, which will help production.

As we know, for businesses to invest in artificial intelligence, they often need the knowledge, time and money. In many cases, they need all three at the same time to succeed. You probably know that better than I do.

This morning, we asked the Governor of the Bank of Canada some questions. To explain why it was included in the monetary policy, he said that businesses are currently turning a corner and really accelerating in that direction.

As someone who knows businesses well and works with them, what are your thoughts on that? Have businesses reached that point? Is it a driver of economic development, a significant investment for the next year and years to come? Have we reached that point?

● (1700)

[*English*]

Jayson Myers: We're particularly focused on applications of AI in manufacturing on the factory floor—so, industrial AI—and the integration of AI in new equipment like uncrewed vehicles or robots, cobots, that can be applied in manufacturing operations.

I think there's another element on top of the ones you've mentioned: the complicated nature of integrating AI along with all of the other technologies required in manufacturing to make it work. AI itself is not a solution in manufacturing. It needs to be integrated with sensors. It needs to be integrated with segregated networks and operating software. It needs to be integrated with edge computing because cloud computing takes too long for real-time information and real-time control. It needs to be integrated with robotics, automation systems and vision systems that are often smart themselves. It's a complicated process.

That's why we're focusing on the collaborative nature of bringing technology companies together with manufacturers, along with the types of training that are required for employees to adopt these systems successfully.

You know, even the large consulting companies say that 85% to 90% of industrial AI applications fail to meet business objectives. The issue is not the power of AI; the issue is the management of this. That's where we're focusing our attention. The opportunity is huge: increases in throughput, increases in product quality, less downtime of equipment. It allows manufacturers to take advantage of technology to offset some of the labour shortages that companies are facing.

The opportunity is great. The issue is this: How do we manage the successful implementation of these AI applications in a manufacturing operation?

[*Translation*]

Steeve Lavoie: Thank you, Mr. Myers.

I had the following question: Do you feel that businesses have reached the point of investing heavily in artificial intelligence in the coming years? Please give a short answer.

[*English*]

Jayson Myers: Yes, I think that's right. I think AI provides manufacturers with an opportunity to vault over much of the competition here. Manufacturers in Canada need to compete on value; they need to compete on customization.

[*Translation*]

Steeve Lavoie: Thank you.

I have a quick question for Ms. Vlanich.

Ms. Vlanich, you spoke earlier about the lack of predictability for businesses. You even mentioned a company that's waiting 18 months to find out whether it can fulfill a contract. Are you familiar with Bill C-40, which will enable the creation of the Canadian corporation for defence investment? Are you familiar with that?

[*English*]

Nicole Vlanich: I'm not aware of it, no.

[*Translation*]

Steeve Lavoie: This bill will enable the creation of a defence investment company that will, among other things, assist businesses with loans. It would open up access to certain contracts, guarantees and insurance. I encourage you to read through the bill because it could provide some answers to some of your members.

That's all. Thank you.

[*English*]

The Chair: Give a brief answer.

Nicole Vlanich: I appreciate that, but I think there's still a wait time to meet the criteria to enter the industry. If there is funding or support available to do it, that's great. However, if they get the support tomorrow, they can't start entering that sector. There are still criteria they have to meet.

● (1705)

The Chair: Thank you very much.

Mr. Simard, go ahead for six minutes.

[*Translation*]

Mario Simard: Thank you very much, Madam Chair.

Ms. Vlanich, we'll come back in a moment to the issue you very clearly highlighted by mentioning cash flow problems, but I first want to broach another topic.

Last week, following some testimony before the committee, I was made aware of how some people in the manufacturing sector have trouble sourcing galvanized steel. I'm convinced some of your members are being impacted right now. Earlier this week, I also heard a presentation by Alpek Polyester, the largest supplier of PET resin, or polyethylene. I won't try to say the rest of the name because I'll definitely get it wrong. I suppose it also impacts some of your members.

Are your members currently having problems with their supply chains in addition to those related to customs duties?

[*English*]

Nicole Vlanich: Yes. When it comes to purchasing Canadian steel, there are a number of issues, one of which being unreasonable lead times. This is when they are forced to source elsewhere. There are also barriers to purchasing domestically because the specific steel they need is just not available in Canada. They often have to source European steel from a U.S. seller.

They have a lot of issues, but the biggest one is that they're often buying Canadian steel from outside Canada. It's been purchased by an international company. They're selling it back to our Canadian manufacturers. This is because they have a stock of it. Rather than waiting months for a Canadian company to source it for them, they are buying it internationally. In our opinion, as an association, that shouldn't be something they're forced to do.

[*Translation*]

Mario Simard: Thank you for your answer.

This again leads to something similar. Some of your members probably use aluminum sheets for the moulding work they do. Aluminum sheets are generally made in the U.S. because we don't currently have the ability to produce them in Quebec or in Canada. We are therefore very much dependent on a product we produce. Even though we produce aluminum, we are dependent on the U.S., and this has a significant impact on local production and processing. If you have any information on this, it would very much be of interest to the committee if you could send it to us, as a report will be produced once we have heard testimony from witnesses.

Now, I'd like to bring you back to what you were saying earlier, about cash flows. As a member—and I suppose this is true of my colleagues as well—I receive calls from numerous businesses telling me that they unfortunately do not know the criteria for programs under the Business Development Bank of Canada and Economic Development Canada. Some people might have their applications denied while others are accepted. Those who have had their applications denied seem to be a bit in the dark, because they don't know the criteria that led to the denial. Earlier you talked about unreasonable lead times of over six months. That's generally what people in the manufacturing sector are referring to.

I'm wondering whether you have documented this phenomenon, or if you have any specific recommendations for the government.

[*English*]

Nicole Vlanich: I have. It's an issue we've brought up quite a few times.

In addition to that, we have member companies that are outsourcing to companies to fill out these applications for them—paying upwards of $30,000 just to submit the application, with no guarantee of approval—because they don't have the capacity internally to do it themselves and the applications are so complicated. There's that aspect of it. Then there's the uncertainty of it, and there's no guarantee of getting the approval.

The biggest recommendation I can make is to simplify the process and expedite the approval process. Get the money they need in their hands.

When we're looking at cash flow and looking at their P and L statements and things like that, we also have to keep in mind that, if they use a loan program, it will impact their relationship with their banks. That will impact their lines of credit and access to funds from their banks, which is something they don't want. That's why, back in April, when myself and some of the board members of CAMM testified, we said that loans were not the answer. It just puts them in a bad position.

● (1710)

[*Translation*]

Mario Simard: Thank you very much for your answer.

Do I have any time left, Madam Chair?

[*English*]

The Chair: You have 28 seconds remaining.

[*Translation*]

Mario Simard: I'll have the opportunity to talk about this further with you, Mr. Sweeney and Ms. Vlanich. You've both mentioned that what would help you would be renegotiating the Canada—U.S.—Mexico Agreement.

Right now, the government's rhetoric is that we need to develop new markets, but we know that for people in the manufacturing sector, the ideal solution would be to reach an agreement with the U.S., since trade with new markets can't be developed overnight.

You may get the opportunity to answer later.

Thank you, Madam Chair.

[*English*]

The Chair: Answer very briefly, if anyone wants to attempt an answer. Otherwise, you can send it to the committee in writing. If you could send a response to Mr. Simard in writing, it would be appreciated.

Thank you very much.

We will move on to Mr. McKenzie, please, for five minutes.

David McKenzie: Thank you, Madam Chair.

Perhaps I can aid my colleague by picking up on that theme.

Mr. Sweeney, I believe you indicated that your members produce 77% of the passenger vehicles produced in Canada. Is that correct?

Brendan Sweeney: Passenger vehicles and light trucks....

David McKenzie: Are 80% of those exported to the U.S.?

Brendan Sweeney: That's correct.

David McKenzie: That is, at least, historically.

I just wonder what—

Brendan Sweeney: That's this year and last.

Give or take half a per cent.

David McKenzie: That's fair enough.

I just wonder what your members think about the prospect of exporting their production in Canada to any of the nations in the European Union.

Brendan Sweeney: It's unlikely that we will do so, unless something changes dramatically on both ends.

David McKenzie: Isn't this a good day? That may just be possible. Discussions are under way.

What would it take for Canadian-manufactured vehicles to be exported to any member nation of the EU?

Brendan Sweeney: A sizable market, a demand for those vehicles in the EU....

David McKenzie: I presume that, at present, manufacturers within the EU are satisfying that domestic market demand.

Brendan Sweeney: Manufacturers within and around the EU.... There are also manufacturing operations in Turkey, in Morocco and in other parts of the world. However, for the most part, you're correct. Most demand for vehicles in the EU is satisfied by assembly plants, some of which are operated by our members' parent companies and most of which are not. The EU, though, is mostly served from the EU, just as North America is mostly served from North America.

David McKenzie: That's fair enough.

I wonder if you could comment on your members' views about the importation of Chinese electric vehicles into Canada.

Brendan Sweeney: We put in our submission in the spring when there was a consultation. We welcome competition from companies that are following the same rules as us and from companies that are operating on a level playing field. If a company is following the same rules and operating on a level playing field, then we welcome that competition. If they're not, the opposite is true.

David McKenzie: How do your members feel about the vehicles that are being exported to Canada, now, under the tariff exemption? Are they being produced on a level playing field?

Brendan Sweeney: Most of those are Teslas. That's what we understand right now, and we have to dig into that one a little bit further.

David McKenzie: Thank you. I'd be happy to have any information you can provide on that.

I'd like to ask you about one of your members. Honda had planned a major investment in a batteries-only facility or an EV plant.

Brendan Sweeney: I think it was a fulsome investment.

David McKenzie: Is there any expectation that it will be reinstated and that it will move forward?

Brendan Sweeney: If there's no market for the vehicles, and more specifically, if there's no market for the vehicles in the United States, it's unlikely that an investment designed to service that market would move forward.

David McKenzie: We would need some certainty—

Brendan Sweeney: That said, they're having a great year in Alliston, running two plants and celebrating 40 years in Canada. At the moment—and who would have thought this in 1986 when Honda first came to Canada—Simcoe County is the largest automotive-producing jurisdiction in Canada.

What you mentioned has happened, but Honda has not laid anyone off, and they're manufacturing at full capacity, or maybe even a smidgen above. That means a bit of overtime right now, and they've turned Simcoe County into the largest automotive-producing jurisdiction in the country.

● (1715)

David McKenzie: Outstanding. That's a great Canadian success story.

I have a short time left. I'm going to ask Ms. Vlanich a question.

Is there anything you can assist this committee with in regard to interprovincial trade barriers that the federal government might try to put some focus on?

The Chair: Give a brief answer, please.

Nicole Vlanich: What I would say when it comes to interprovincial trade barriers is we have access to CanExport funding. The previous witness spoke a lot about that funding and using it internationally. Let's make it accessible to interprovincial trade missions so that our Ontario companies, for example, can get out to Alberta and get out to B.C. to try to gain that business.

The Chair: Thank you very much.

Mr. Naqvi, go ahead for five minutes, please.

Yasir Naqvi (Ottawa Centre, Lib.): Thank you very much, Chair.

I want to thank all our witnesses for coming today and giving us some really valuable testimony.

One of the big objectives behind this study is to learn ways to help our manufacturers diversify into various markets, to build on the success with the United States and access more markets abroad. I'm really happy to hear some helpful information in that regard.

Mr. Myers, it's good to see you again, albeit virtually. I wanted to ask you a couple of questions.

You said something that really caught my attention. I jotted it down right away. You said, “trade diversification is an innovation challenge.” Can you unpack that for us?

Jayson Myers: Thank you, Mr. Naqvi. It's good to see you again.

What I was referring to is that trade diversification is a challenge very similar to what companies need to consider as they're innovating here.

First of all, as we've spoken of in this hearing and the previous one, there's a lot of work that goes into identifying new customers, identifying market opportunities and developing the market-entry strategies that companies need before they become export-ready. It's very innovative in that sense, in the same way that companies would be looking at developing new products and designing new production systems here.

It's also part of the innovation challenge because they need to figure out how to compete and how to use advanced technologies in order to do that. What sorts of technologies are going to enable them to meet the compliance requirements to enter new markets, to meet new and changing customer demands or to simply compete in those markets?

Then, of course, there are scale-up issues and there are skills issues that are very similar to our innovation challenges.

I really encourage you to think about trade diversification as a part of the innovation challenge that manufacturers and technology companies need to take into consideration as they're looking at going into new markets. In order to do that, what sorts of products and services do you need, and how do you customize your product offering to meet the demands of new customers?

Yasir Naqvi: Very quickly, do we have the necessary ecosystem in Canada to assist companies in meeting that innovation challenge you're referring to?

Jayson Myers: We could improve our ability to help companies develop these strategies before they become export-ready and help the companies become export-ready.

Secondly, though, I think we could improve the way we bring companies together—not early-stage companies, but manufacturers, companies with technologies—with international customers, multinationals and engineering companies in Canada that can take their products global.

On both sides, there are improvements that can be made in the types of programming the federal government offers.

● (1720)

Yasir Naqvi: Where does AI fit into all this innovation that you're referring to, and where does it fit into helping Canadian companies to innovate, excel and have a far better product to export around the world?

Jayson Myers: There are a couple of ways.

AI is enabling companies to improve their competitiveness, their productivity, the quality of their output and, clearly, the way they manage their supply chain and connect with customers.

At the same time, AI is enabling companies. Conrex Steel, for example, in northern Toronto has the largest steel press in the world, and it is now using AI to read the characteristics of the steel it's pressing, and it's selling that as a service.

There are new opportunities through the use of AI to create new types of manufacturing products—clearly, smart products—and new types of services.

Yasir Naqvi: Thank you.

The Chair: Mr. Simard, you have two minutes.

[*Translation*]

Mario Simard: Thank you very much, Madam Chair.

My question will be addressed to you, Ms. Vlanich and Mr. Sweeney, and I'll go back to what I was talking to you about earlier.

As you know, the trade crisis started around February 2025. During the last crisis, the pandemic, there was a solution, which was the vaccine. We figured we would eventually get through the pandemic once vaccines were rolled out.

In the context of the trade conflict, the government is making heavy use of the market diversification rhetoric, but I don't think market diversification is the answer. Perhaps you have information that could be very useful to us. I'm wondering, Ms. Vlanich and Mr. Sweeney, how many people in your sectors have been able, since February 2025, to diversify their markets and find new opportunities and clients to replace those they had from the U.S.

We still rely heavily on the U.S. market. The federal government's strategy seems to be focused on this market diversification rhetoric, which is becoming a sort of antidote to the current crisis. I'd like to hear you on this as we should perhaps be concentrating on the agreement we need with the U.S. and the trade agreement that would meet your needs.

Do you have any comments?

[*English*]

Nicole Vlanich: The members that are diversified and are in these other industries were already doing that. The other ones are working on it.

As far as replacing the customers in the United States is concerned, it is never going to be possible to fully replace them. We need an agreement with the United States in order for our Canadian mould-makers to continue doing business. They need that access. They've built their business on the expectation of having that access.

The Chair: Thank you very much.

Ms. Kusie, you have four minutes.

Then, to finish the meeting, Mr. Bardeesy will have four minutes.

Stephanie Kusie: Thank you very much, Madam Chair.

Ms. Vlanich, thank you very much for joining us.

We had one of our great Conservative Windsor MPs here today, and I know from her that so much of the Windsor-Detroit area is intertwined.

As a Windsor-based association, can you please quickly touch on the importance of the interconnectedness of manufacturers, automakers, workers and consumers in the region?

Nicole Vlanich: As I just said, these companies have built their business on that access. The same can be said for companies on the other side of the border. Both have built their businesses on either side with the expectation of having access to the other. This is because so much of what they do goes back and forth multiple times.

It's not something, as I said earlier, that is just shipped, sent, dropped off and left. They have people, and their job is to travel to do maintenance, to do checkups, to work with these customers and to assess their needs, and things like that. They need to have that easy access. They've built their businesses around this. They need that, because without it, the companies on the U.S. side will find other suppliers. It's the Canadian companies that are not going to be able to replace them as customers.

Stephanie Kusie: Your association also represents members of the plastics industry.

Over the summer, I met with representatives of the Chemistry Industry Association of Canada, who expressed concerns about some of Canada's countertariff measures against the U.S. Specifically, in their eyes, once in effect, some Canadian countermeasures would have more of a negative financial impact on Canadian manufacturers than on those in the U.S.

Is this a concern that your members have also echoed, not just in the plastics industry but across the sectors that you represent?

● (1725)

Nicole Vlanich: Yes, we were very much against countertariffs, as they were just another expense tacked on to these companies. It goes beyond plastics; it affects all of them across the board.

Stephanie Kusie: In your June 2026 opening testimony to this committee on the Canada-Japan trade study, you said that a “large majority of the vehicles made by PMAC members”—Honda and Toyota—“are exported to the United States”, and that the “number ranges from 75% to 85%, depending on the vehicle model.”

Has this changed?

Brendan Sweeney: No.

Stephanie Kusie: When you factor sales to Canada into that equation, what percentage of vehicles that your members manufacture are sold in Canada or exported to the United States?

Brendan Sweeney: It's more than 99%.

Stephanie Kusie: You also stated in June that “there are no realistically viable export markets outside the United States for the vehicles made at PMAC members' Canadian assembly plants.”

Is that still the case?

Brendan Sweeney: As I mentioned in my testimony today, that is the case. Our focus is on selling vehicles that we make in Canada to the United States and to Canada.

Stephanie Kusie: That's very difficult with tariffs and countertariffs and without a deal.

This all leads me to what I view as the biggest consideration for manufacturing in terms of this study, which is that the government should be focused on getting a deal with the U.S. and providing some sense of certainty to Canadians and Canadian business.

Do you agree that certainty for the auto sector and a deal with the U.S. should be our top priority at this time?

The Chair: Give a very brief answer.

Brendan Sweeney: The highest priority for PMAC members is trade with the United States.

The Chair: Thank you very much.

Mr. Bardeesy, go ahead for four minutes, please.

Karim Bardeesy (Taiaiako'n—Parkdale—High Park, Lib.): Thank you very much.

Thanks for the chance to sit in on this committee.

Given the focus of the motion on trade diversification, I want to start with a couple of questions for Mr. Myers.

In your testimony and in some of the other material I've seen from your organization, you've been quite focused on industrial AI and the application of AI in industrial processes and the physical nature of the work that is done through manufacturing.

Can you speak to some of the export opportunities that exist in that in Canada? I know we import a number of machines across the manufacturing sector concerned with robotics and the inclusion of AI in those robotics. Do we have an export opportunity with some of our machinery, if we do physical AI, to places outside the United States?

Jayson Myers: Absolutely.

One of the leading AI companies in the world, which won the international award for robotics at the Hannover fair two years ago, is a company in Richmond Hill called Maple Advanced Robotics. They work with AI and robotics systems to do something that nobody else in the world can do, which is to create a totally autonomous robotic platform—I'm sure Mr. Sweeney's members are already using it—to polish and finish car doors.

There are tremendous opportunities. We excel in a lot of robotics and applications of physical AI, and in applications of those in products. These are the areas where we're developing new products and new advanced manufacturing capabilities. That's where the opportunity for trade diversification really is.

Karim Bardeesy: Could you share some of the countries? We are currently importing some of those products, and the resulting manufacturing from the import of those products is going to a variety of countries, but are there any specific export opportunities in specific countries that are coming from what you described?

Jayson Myers: They are particularly in Europe, but also in Mexico, where companies are using AI in machinery and equipment to improve productivity in manufacturing establishments there. Europe is a particularly good market for smart robotics and our AI capabilities in manufacturing, as it is for quantum manufacturing around genomics and manufacturing around the processing of critical minerals. That's a market where we already know there's tremendous demand for Canadian capabilities.

● (1730)

Karim Bardeesy: I have a couple of quick questions for Mr. Sweeney.

You mentioned, in your testimony, the sourcing of some parts your members use in final assembly outside the U.S. and Canada. Could you speak to what those countries are and whether Canadian trade relations with those countries assist with that, in general?

Brendan Sweeney: Our members source a bit from Mexico. Certainly, some electronic components that are not manufactured in North America come from Japan or other CPTPP members. It's unlikely—let's just call it—that, in the next decade, those electronics will be manufactured anywhere in North America.

If you get into a Canadian-made CR-V, RAV or even Lexus, there are two different screens. There are electronics. You need these for this generation of vehicles. If that vehicle is electrified—and a majority of the vehicles our members manufacture in Canada are—you need some battery electronics. Most of those are not manufactured in North America, so we import them from trading partners such as Japan.

Karim Bardeesy: Would—

The Chair: I'm sorry, Mr. Bardeesy. Our time is up.

Thank you very much to the witnesses for their very valuable testimonies.

There is no meeting this coming Thursday, so that's it.

The meeting is ended. Thank you.

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