

Canadian Supply Base Index

Q3 2026 / COMPILED BY DEFCA FROM DIRECT MARKET WORK

A public directory counts every firm that says it works in a category. A prime counts the ones that can prove it. This index is the difference between those two numbers, across six categories of the Canadian aerospace and defence supply base.

HOW TO READ IT

LISTING: firms that publicly describe themselves as working in the category. QUALIFIED: firms that hold the certifications and audit history a prime will accept. CONTROLLED GOODS: firms registered to handle controlled goods and technical data.

CONNECTORS & INTERCONNECT

14

LISTING

6

QUALIFIED

4

CONTROLLED GOODS

The real shortlist is four names, not fourteen. If a program needs a second source here, that is the whole field, and some of it is already committed.

PRECISION MACHINING

120

LISTING

38

QUALIFIED

22

CONTROLLED GOODS

Looks crowded until you filter it. Most Canadian shops serve energy or automotive and have never held an aerospace approval. The qualified ones cluster in Ontario and Quebec, and their lead times move with the primes.

COMPOSITES

22

LISTING

9

QUALIFIED

5

CONTROLLED GOODS

The thinnest structural category in Canada, and the gap widens with every program announced. This is where a new entrant has the most room.

Canadian Supply Base Index

Q3 2026 / CONTINUED

AVIONICS & ELECTRONICS

31

LISTING

14

QUALIFIED

11

CONTROLLED GOODS

The deepest controlled goods coverage of any category, which is exactly why it is the hardest to enter. Most of the work is already tied to long term prime agreements.

CASTINGS & FORGINGS

9

LISTING

4

QUALIFIED

2

CONTROLLED GOODS

Canada largely imports this category. Every program with a domestic content target has a castings problem, and almost nobody is solving it.

UAV & AUTONOMY

47

LISTING

11

QUALIFIED

9

CONTROLLED GOODS

The fastest growing and least mature category. The gap between what firms market and what they can actually qualify is wider here than anywhere else.

METHOD AND LIMITS

Figures are DEFCA's own working estimates, compiled from direct market work rather than a public register, and are updated quarterly. They are intended to show the shape of a category, not to be cited as an official count. Named firms, capacity detail and contacts are part of paid engagements.

Working on a Canadian content requirement, or trying to enter this market? sales@defca.ca