

October 2, 2015

Export Market Development Strategy – 3 year plan Approved October 20, 2015 at AGM Revisions approved via phone Jan 25, 2016

Canadian Association of Moldmakers (CAMM) is a national association representing companies involved in tool, die and mold as well as service and supplier companies to the industry. Our mandate is to:

- promote and develop global exposure of the Canadian mold, tool and die industry;
- assist members in finding opportunities for export;
- be the voice of industry to all levels of government;
- encourage the development and adoption of technology within member companies and in partnership with post-secondary learning institutions; and,
- develop the next generation of skilled trade employees through youth-focused initiatives.

We are continuing to enhance our IBD plan from one year to next, by reviewing and analyzing past results, consulting our industry shops, and studying and looking ahead to future trends. Our focus over the past three years has been to enhance our global exposure with Mexico, USA, Germany and we started to look at Brazil. We have strategically placed ourselves over these past three years to assist our industry in increasing their export abilities in these areas.

We have learned in the past years leading up to this fiscal year is that our shops need to be more locally accessible to these areas – for example sister companies set up by moldmakers in Mexico and Southern USA are proving to be very successful to our companies. The Brazilian Market continues its growth in the auto sector by 4.2% annually; but the tariffs make it very difficult to export into this Country.

We have also learned that although while our shops export very little into the German market, it is in Germany that many of the large Automotive Headquarters are housed – both OEM and Tier 1 (e.g. BMW, Volkswagen, Draexlmaier, Bosch, Hella, etc) and it is here that major purchasing and sourcing decisions are made. For example - we might do the work for the OEM or Tier 1 in Mexico and in Southern USA, but it is their headquarters in Germany that makes final decisions. It is for this reason that we need to continue to have a strong presence in the European market and to continue to work on our past/present/future relationships.

This year we will continue with our European Relationship by attending the IZB (International Suppliers Fair) will be held in October 18-20 in Wolfsburg Germany. We will be co-exhibiting with APMA (Automotive Parts Manufacturing Association) and leading a Canadian Pavilion with some support from Gilles Chatelain, Area Director (Germany and Central Europe) International Trade Branch. We will be seeking GOA funding for this show to travel to the event with 2 other Canadian Companies. We will be working on plant tours and B2B meetings for the Canadian companies in the Pavilion.

There is ever increasing pressure by OEM's on their Tier 1 supply base(s) to convince them (OEM's) that current or even new suppliers are 'willing' to pony up and basically become a local extension of the OEM themselves. OEM's are downloading more and more responsibilities on to their Tier 1 suppliers who in turn are doing the same to the moldmakers they deal with. OEM's & Tier 1's are downloading more & more responsibilities to their suppliers to be everything for them, and to create long term partnerships. The OEM's are constantly trying to lower piece price models and reducing freight costs & shipping times helps immensely. It's some of the first 'low hanging fruit' they go after, because if you can't do it, someone else who's located closer will be able to more easily.

Major considerations for being awarded work will include offering full service local support, and the willingness to tailor fit processes specific to that OEM's needs or guidelines, etc. These guidelines are some of the basic key indicators that OEM's will consider, but also important are items that can include Geography / Financial Stability, R&D investment, etc...

It is for this reason that is important for our shops to partner with local shops in these areas or to set up sister plants to service the growing number of plants requiring support down there.

In order to keep competitive with the OEM in Southern USA and in Mexico we need to have a strong presence in this area, and satellite programs/shops will become essential in order to stay competitive. We will continue over the next 3 to 5 years to assist our shops in setting up satellite shops in this area, partnering with locals and by doing trade missions in this area, exhibiting at trade shows, and inviting them to our reverse trade show now planned on being an annual event in June, in Windsor Ontario.

CAMM and members will need to increase their efforts in gaining exposure to the Southern Markets & Mexico. CAMM will be having another Canadian Pavilion at the NPE 2018 shows which has over 60,000 registrants and is held in Florida. At the NPE Show we are always given a prime location with heavy traffic that is exposes the association and our members to a worldwide audience that gets a heavy attendance rate from Southern USA, Mexico, Central and South America – all areas we are trying to promote our membership to and seeing strong interest in our services.

CAMM will be holding more meetings with selected industry partners from the Cdn and Mexican government to teach their members the in & outs of doing business in Mexico offering support, guidance and direction for companies considering setting up and/or doing business in Mexico. This minimizes the major hurdles that can take place with dealing with foreign governments and jurisdictions.

Building on increasing exposure along with benefit of the declining Canadian Dollar and increased Chinese costs, our focus will lean heavily towards Mexico and Southern USA in the upcoming years while maintaining a foothold in Europe.

As part of our efforts to increase exposure, CAMM and its members will participate in events such as:

- Canadian Manufacturing Day, Cancham Mexico–January 20, 2016–CAMM will be supporting this event
- Plastics in Automotive - Jan 11 – 13, 2016 CAMM will be exhibiting/participating
- SAE World Congress April 12-14, CAMM will be exhibiting/participating with APMA
- APMA/CAMM Conference-Trade Show, B2B meetings & Plant Tours in Windsor Ont. June 2–4, 2016
- Amerimold, Novi, Michigan JUNE 15-16, 2016 , CAMM will be exhibiting/participating
- IZB (International Suppliers Fair), Oct 18-20, 2016 CAMM exhibiting – Canadian Pavilion – B2B meetings & tours
- Plastimagen – November 7 – 10, 2017 Mexico City plus B2B meetings scheduled
- B2B Automotive Meetings & Plant Tours - QUERETARO, MEXICO February 20 – 27, 2017
- Plastec West – Anaheim California – Feb, 2017 (dates to be determined)
- Plast-Ex – Toronto – May 16 – 18, 2017
- CMTS 2017 – Toronto – Canadian Manufacturing & Tooling Show

- NPE – Plastics Trade Show – Orlando, Florida – March 23 – 27, 2018 CAMM hosting a pavilion of Canadian moldmakers and suppliers

CAMM will be expanding and making improvements to our website this year in order to include more languages, (German, Spanish and French) along with improving a database to showcase our industries capabilities and products. We receive 2 – 4 job inquiries a month and we are hoping to increase this to 8 to 10 a month.

Various B2B meetings as they are arranged. Many of the above trade shows are either annual or triennial.

Our close affiliation & partnership with the Automotive Parts Manufacturing Association (APMA) has proven to be very beneficial to our members and industry. This affiliation allows us to have more productive B2B meetings, networking events, trade shows etc with the OEM, Tier 1, Tier 2 and the Suppliers all included at the same events. Discussions are being made to partner and organize even more activities during the next three years that will mutually benefit the both organizations, members and industry as a whole.

It is through GOA funding that we are able to afford 3 to 4 strong events with funding and 3 to 4 strong events without funding. This allows CAMM to be very active and effective in strategically placing events throughout the year and into key targeted areas. The GOA funding allows us to assist SME's in their global exposure and to assist in increasing their ability to export more. Without GOA funding, we could only do very selective shows minimizing our exposure to potential new clients for our members.

Our 3 year plan has been formulated using the following available statistics and industry insights: and with this knowledge and input from our Industry we will concentrate on Mexico and southern USA for export opportunities.

Mexico

Automotive Industry in Mexico A Key Sector by Pro Mexico

PRODUCTION: Mexico's automotive industry is mature, dynamic and in continuous growth. In 2014, Mexico's Automotive industry showed clear signs of recovery; light vehicle production reached a new historical record with 3 million vehicles¹.

At a global level, Mexico ranked as seventh producer of light vehicles¹. In two years, Mexico climbed two positions, surpassing French and Spanish production.

Currently, the automotive sector accounts for 6% of the national GDP and 18% of manufacturing production. The Mexican automotive industry is expected to continue increasing in the future. The forecasts indicate production will reach 4 million units by 2018 and 5 million by 2020¹.

Companies in the light vehicle industry have a total of 18 production complexes located in 11 states of Mexico, where they perform activities that range from assembly and armoring, to casting and stamping of vehicles and engines. Currently, more than 48 car and light truck models are produced in Mexico.

In terms of heavy vehicles, the OEMs have reached an important level of development in the country, performing activities ranging from assembly, stamping and bodywork, producing a wide range of models to satisfy the demand of the domestic and export markets. Currently, 11 commercial vehicle manufacturers and two engine manufacturers for this kind of vehicle have production facilities in Mexico.

In 2011, Mexico reached production of 136,678 heavy vehicles, ranking as sixth producer globally behind China, Japan, India, The United States and Brazil. The heavy vehicle production in Mexico is expected to reach 196.8 thousand vehicles by 2016.

INTERNATIONAL TRADE: *Mexico is the world's eighth car, truck, part and component producer. It's main export market is still the United States, even when in recent years, several markets, such as many Latin American countries, have increased their share in Mexican exports.*

Concerning heavy vehicles, in 2010 Mexico was the leading supplier of commercial vehicles to the United States. Mexico had an 85% share of imports value to the United States in the commercial vehicle segment, exceeding Canada in that year.

FOREIGN DIRECT INVESTMENT: *In 2012, the Automotive and auto-part sectors in Mexico accounted for 20.8% of total foreign direct investment (FDI) ³. This reiterates the country's appeal as one of the sector's investment destination.*

Investments announced between 1999 and 2013 by automaking companies established in Mexico reached more than 30 billion dollars, with the leading investors being General Motors, Chrysler, Daimler, Ford, Volkswagen, , Nissan and Mazda³.

OEMs IN MEXICO: *The automotive and auto parts sector in Mexico has been driven by the productive presence of the top ten (light and heavy) vehicle assembly companies in the world, such as General Motors, Ford, Chrysler, Volkswagen, Nissan, Honda, BMW, Toyota, Volvo and Mercedes-Benz.*

Most of the assembly companies in Mexico have auto parts companies located around their vehicle plants to comply with supply and delivery deadlines. End of Report

“While Mexico is part of NAFTA, it also has negotiated unilateral free-trade agreements with dozens of other countries. Looking out to 2020, IHS Automotive forecasts rapid growth for Mexico, modest gains for the U.S. and a slow decline for Canada. Said IHS's Jackson: “Mexico will take a much more prominent role in North America and in the world.” – Plastic News – Jan 2015 issue.

Our shops have increased their exports into this country by over 10% in each of the past 2 years. We will continue to work with Marcos Barros and David Valle to take advantage of every opportunity to increase our exports into this country. We will continue to show a strong Canadian Pavilion of over 15 shops at Plastimagen 2016, 2017 and 2018. We are presently working with Marcos and APMA to put together a showing in Queretaro Mexico at an exclusive Automotive trade show and B2B meetings in 2015 and 2017. We will be bringing over 10 Canadian Companies to this event. We will continue to bring Canadian Companies to invite key players to the APMA CAMM conference held annually in Windsor – June 2015, 2016, 2017 for B2B meetings, plant tours and networking events. We will continue to show support to companies that want to put a secondary plant in Mexico. The trade shows that we will be attending in this area will open up the doors to invite OEM's and Tier 1's to our B2B Conference in June with APMA

We are currently working with the Off Shore Group, Pro Mexico and government officials in Mexico in setting up opportunities for our Canadian shops to set up Satellite shops in Mexico. They provide excellent pooled resources and guidance for our Small to Medium Shops that do not have the resources to put together an operation in Mexico.

Southern USA

Below are a few headlines from Southern Corridor Dated November 2015 – for more detail please refer to this link: www.southernautocorridor.com/111715/tabid/537/Default.aspx

- *VW's Chattanooga expansion moves ahead Appendix A*
- *Nissan making new Altima sedan at Southern plants Appendix B*
- *SaarGummi Tennessee expands in Pulaski, Tenn. Appendix C*
- *German-based company to create 110 jobs in Kentucky Appendix D*

- *Toyota is now making a Lexus in Georgetown, Ky. Appendix E*

AutoForecast Solutions LLC stated that: “Since 2009, the Southern US States have been providing substantial incentives for automotive investment, resulting in a significant amount of vehicle production capacity investment in the area. For example, in 2014 the Southern US States produced over 2.4 Million more vehicles than were produced in the area in 2009. And by 2021, these States are forecast to contribute an additional 700K incremental units of production off of a 2014 base. When automotive assembly is established, the OEMs expect an investment to be made by the supplier community. Depending on the Just-In-Time (JIT) needs of the component or system required, these OEMs provide guidelines in terms of the proximity the supplier needs to set up operations in order to make the logistics work. For this reason, the growth in the Southern US States has promoted investment from the supporting supply chain and related industries. This area of NAFTA will continue to be an area of growth into the foreseeable future.” End of AutoForecast Solutions LLC report.

States that are producing Light Vehicles in the South include: Alabama, Georgia, Kentucky, South Carolina, Tennessee and Texas

The Southern United States continues to outshine Detroit as investments move from the Midwest to Mississippi, Alabama, Georgia, Kentucky, South Carolina, West Virginia and Texas. Mississippi is particularly well suited compared to other Southern states due to its central location in the “Southern Automotive Corridor” and its proximity to Mexico. The state is also served by a key axis of the interstate system, rail systems, sea port and the Mississippi River. With our lower Canadian dollar combined with increased Chinese costing, we become more competitive for the OEM’s to import from Canada. The trade shows that we will be attending in this area will open up the doors to invite OEM’s and Tier 1’s to our B2B Conference in June with APMA.

Germany

“EUROPE’S BIGGEST MARKET Germany is Europe’s number one automotive market in production and sales terms; accounting for over 30 percent of all passenger cars manufactured and almost 20 percent of all new registrations. Germany also boasts the largest concentration of OEM plants in Europe. There are currently 43 OEM sites located in Germany. German OEM market share in Western Europe was more than 51 percent in 2014. Germany is conveniently located next to Poland, the biggest Eastern European market with passenger car unit sales of 325,000 (six percent annual increase) in 2014

GERMANY’S LARGEST INDUSTRY The automotive industry is the largest industry sector in Germany. In 2014, the auto sector recorded turnover of EUR 384 billion – around 20 percent of total German industry revenue. The automobile industry is one of the largest employers in Germany, with a workforce of around 775,000 in 2014; an increase of almost three percent compared to the previous year. “ To see the entire 19 page article refer to Industry Overview – website www.gtai.de/GTAI/Content/EN/Invest/_SharedDocs/Downloads/GTAI/Industry-overviews/industry-overview-automotive-industry-en.pdf

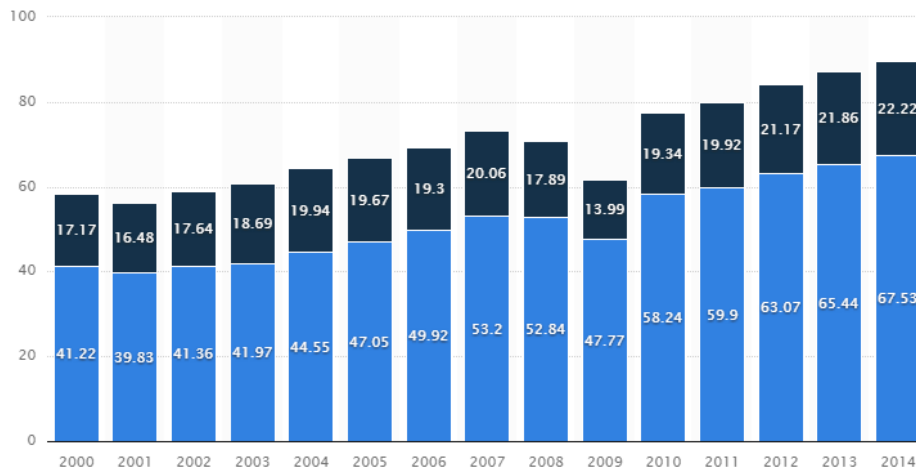
Major Players

- Each year, CAMM expands our connections and reach by working with a broad variety of associations and businesses. These strong connections allow us to break down social, cultural and economic barriers between countries and to participate in trade events via exhibitions and inbound trade missions. Sampling of key organizations includes:
 - APMA (Automotive Parts & Manufacturing Association)
 - FEPAC (Federation of Plastics & Composites Alliances)
 - CTMA (Canadian Tooling Manufacturing Association)
 - CME (Canadian Manufacturing Exporters)
 - EDC (Export Development Canada)
 - The Off Shore Group

- Pro Mexico
- Colleges and Universities
- Federal and Provincial Trade Commissioners stationed in Mexico, Germany, Argentina, Brazil, Canada, and USA.

Nature of the Industry/Market Trends

- Industry analysts predict:
 - New vehicle sales to return to previous peak levels by 2016 (Dec 2015 numbers meet previous peak) and reach new record high levels the entire second half of the decade (information gathered from Market Analysis site on the Trade Commissioner Web site)
 - Light Vehicle production eke out previous record levels by the close of 2015, with the potential to rise 1 – 2 million units (Domestically - NA) and 15-20 million units (Globally) above previously seen levels by 2020
 - Capacity issues in the OEM assembly plants will cause 24/7 production runs, creating growth in mold, tool and die repair and maintenance offering the opportunity and reliance on suppliers for additional export growth in our sector



- 2015 - 92.5 million – Global Vehicle sales
- 2016 – 97.8 million expected
- 2017 – 102 million expected
- The next 5-7 years will have auto companies planning for record numbers of new platform launches, model changes and platform upgrades resulting in increased demand for molds, tools and dies.
- Canada must better position itself to take full advantage of this increased demand and allow companies to be more competitive in global markets with the view of enhancing export opportunities.
- Growing tendency of new automotive assembly plants and related investments are largely occurring in the US and Mexico, Europe and Brazil forcing local companies to be more proactive in targeting new customers and programs
- Manufacturing takes an outsized role in innovation through R & D investment and patents; tight linkages between innovation and manufacturing production; higher-wage jobs in the sector; importance to the country's economic prosperity in terms of exports; spillover benefits manufacturing facilities have on firms and communities around them, and deeper economic harm that comes from allowing our manufacturing production capacity to be hollowed

out it is our position that manufacturing is worth of special emphasis and attention on the part of our elected officials and government departments at all levels

- Access to Provincial and Federal trade commissioners allows us to maximize our efforts and assist us to get the greatest return on our investment of scarce resources (human, financial and time) via:
 - Plant tours
 - Networking
 - Meetings with local associations
 - Identification of contacts and companies

CAMM strives to make every possible effort to plan & participate in events and work with a variety of other associations in areas such as: composites; plastics; tooling, and service suppliers allowing us to market our industry and members as a “one stop shop” whereby we can accommodate any buyer’s needs from raw input to finished product. The ability to market ourselves in this manner, gives us a strong competitive edge by ensuring-buyers that our members can handle new contracts from start to finish.

Previous GOA funding has permitted CAMM to represent a diversity of SMEs at global trade shows without those companies having to incur large, unfunded expenses. Directories with profiles of members are displayed and distributed at all shows, and all trade leads generated are shared with member companies via email and the CAMM website. CAMM as an organization also follows leads from shows with information about the industry in general, and to be available as a resource for questions that may arise.

GOA funding has also allowed us to do more shows in a given year span with and without funding. We have been able to stretch our dollars even further to reach a larger Global Market.

Successes

Please see our list of successes (below) from 2015. These successes have built the foundation of our 2016 – 2019 Business Plan.

B2B Automotive Meetings & Plant Tours - QUERETARO, MEXICO February 23-25, 2015

- Working with Trade Commissioners in Mexico and APMA, CAMM played host to Canadian Companies for this event.
- Mexico is in the top 5 of the world’s largest automobile exporters and still expanding
- 40 Canadian companies participated in the largest and most successful Canadian Mission to date to Mexico in the automotive sector. Buyers from the most important OEMs and TIs converged at the show allowing Canadian companies to recognize the effectiveness of their participation in the Mission.

*The Mission resulted in: Report by **Ing. Marcos Barrera, MBET, MS Trade Commissioner** | *Délégué Commercial, Automotive, Aerospace and Defence, Chemicals and Plastics, Machinery and Equipment.**

1. *More than 400 meetings with the most important OEMs and TIs such as GM, Mazda, Honda, VW, Nissan, Eaton, Continental, Toyota, Irizar, Navistar and Valeo*
2. *A Supplier Day with Daimler Light Vehicles.*
3. *Delegates visiting two of the most important automotive clusters in the region (Aguascalientes & Guanajuato) touring companies such as Nissan.*
4. *The participation of two State Governors in official events with the Canadian delegation*
5. *The participation of APMA’s President as a guest speaker in the show*

6. *The Canadian Ambassador to Mexico presenting the Canadian 2015 Automotive Footprint.*

Canadian delegates expect sales between \$17.8 and \$31 million USD in the short term and up to \$106 million USD in the long term as a consequence of their participation in the Mission. This initiative was the result of collaboration between MXICO, MNTY and GJARA, in partnership with the Province of Ontario (offices in Canada and Mexico), Export Development Canada (EDC), the Canadian Auto Parts Manufacturers' Association (APMA) and the Canadian Association of Mould Makers (CAMM).

There are now 52 Canadian automotive companies in Mexico owning 107 facilities.

Link to the event:

<http://www.automotivemeetings.com/mexico/index.php/en/>

NPE – Plastics Trade Show – Orlando, Florida – March 23 – 27, 2015

- The world's largest plastics trade show and conference of the year—brings together all sectors of the supply chain to include end markets and brand owners
- CAMM put together a Canadian Pavilion with 20 Canadian Shops
- The CAMM section at this show worked as a B2B meeting place as well as an information booth for directing prospects to exhibiting companies and collecting information for membership usage.
- CAMM generated 73 strong leads to Canadian SME plus many other introductory leads, and we will be putting together another strong Canadian Pavilion in 2018.

Amerimold 2015 - June 11-12, 2015 Rosemont, IL, USA

- CAMM organized a Canadian Pavilion at this show again this year as well as exhibited
- Amerimold tradeshow is ideally suited for Canadian mold shops to be represented at this show due to the close proximity of the major OEM's and strong industry focus . This show regularly sees more tooling purchasers than most other shows, even though it is a smaller show than most.
- We brought back 54 strong leads to our industry

APMA / CAMM conference – June 2 – 4, 2015 Windsor Ontario

- The APMA/CAMM conference is a unique opportunity to meet high level decision makers from OEM and Tier 1 and 2 suppliers to the automotive industry. This show is focused on automotive exclusively which means a very select group of attendees which are looking for specific suppliers with specific needs.
- This type of show is very successful when the Attendees and the presenters are aligned. The B2B in conjunction with suitable displays or the ability to attend plant visits makes for a great opportunity for our members. This show is well suited for our members who are located in the Windsor area and the potential clients who are located in the heart of the automotive industry in the State of Michigan.
- CAMM, APMA representatives and other industry members hosted a meeting with Honourable Ed Fast, Minister of International Trade to discuss the issues and concerns & needs our members have and how the government can help assist our industry. CAMM members toured the conference & exhibits with high school and college students

Plastex Trade Show – Toronto June 16 – 18, 2015

- Plast-Ex Canada, provided a dynamic professional environment and showcased plastic related products and services to develop new business. Plast-Ex Canada attracted key decision makers in general and corporate management, production management, and product design engineering, visiting from top industries including automotive and transportation, machinery and equipment, bottling packaging, and building and construction.

- CAMM will help promote this event walking the show and meeting with many Tier 1's to promote CAMM members and the industry.

Euromold, Dusseldorf, Germany, September 22 – 25, 2015

- EUROMOLD is the world's leading trade fair specifically for moldmaking and tooling, design, additive manufacturing and application development. Based on the process chain "from design to prototype to series", it presents products and services, technologies and innovations, trends and tendencies for the markets of the future. The EUROMOLD process chain promotes the formation of networks, partnerships and business relationships.
- The recent move to Dusseldorf opened new doors for our Industry, with the improved ~~to the~~ location of this show.
- CAMM worked with 4 Canadian Shops at this event.

CAMM continues to make contact with the OEM' headquarters to help increase their supplier base to include our SME shops

- GOA funding helps our SME companies to attend and to exhibit at this show. It is through the funding that helps them financially to attend and exhibit at this show as they likely wouldn't be able to otherwise.
- This show was smaller this year – due to the change in venue – the leads that we brought back were distributed throughout industry

Plastec South – Orlando, Florida, November 18 – 19, 2015

- Florida is ranked the second best state in the US for business
- The location being in the Southern US and close to Mexico draws OEM's from both regions.
- Plastec features manufacturing solutions including design, contract services, assembly, automation, plastics, powder processing, packaging and sustainability.
- Plastec helps promote CAMM members to a more diversified audience than our usual automotive clients. Packaging has a strong showing at this show which is very helpful to our traditionally non-automotive members and those wishing to diversify more.
- This show benefits our SME shops to solidify relationships that were formed at the NPE and Plastimagen shows.
- It is our intent to continue to showcase in this area in order to help our SME expand their export ability.

Plastimagen – March 8 – 11, 2016 Mexico City

- Plastimagen is the business center of the Mexican plastics industry, presenting more than 1200 exhibitors showcasing the latest in technology, machinery and worldwide plastic solutions to more than 35,000 attendees related to the plastic industry.
- CAMM again will be setting up a Canadian Pavilion and will be working with Trade Commissioner David Valle to orchestrate B2B and networking opportunities.
- This is a must attend event for our industry to help with export opportunities in this fast growing area.
- Our Canadian pavilion continues to grow at that show, and it continues to help our SME with maintaining work in this area. We will continue to monitor this show, and we will continue to attend this show as long as it is profitable for our Industry.

Looking Ahead –

- Keeping our IBD plan active and on track over the next 3 years, we will continue to expand into strong areas of Export ability for our industry. We will keep a strong presence in Europe, and focus our shops/industry in the

Southern USA States, Mexico and will continue to monitor Brazil's tariffs. The auto industry will be running hot for the next 5 years, and we need to take advantage of this, but we still need to focus on expanding our markets and educate our shops on non automotive markets such as aerospace, defence and household products.

- We will continue to Support and work with APMA at different events. This is a good union of two strong Associations, representing the OEM, Tier 1, Tier 2 and the supplier.

Shows and events that we will be looking at in this time period are:

APMA / CAMM conference – June 14 15, 2016 Windsor Ontario (seeking GOA funding)

- The APMA/CAMM conference is a unique opportunity to meet high level decision makers from OEM and Tier 1 and 2 suppliers to the automotive industry. This show is focused on automotive exclusively which means a very select group of attendees which are looking for specific suppliers with specific needs.
- This type of show is very successful when the Attendees and the presenters are aligned. The B2B in conjunction with suitable displays or the ability to attend plant visits makes for a great opportunity for our members. This show is well suited for our members who are located in the Windsor area and the potential clients who are located in the heart of the automotive industry in the State of Michigan.
- This year we are working with Trade Commissioners in Mexico and Germany to bring in strong buyers for our industry, along with India and southern USA companies. We have changed the format for this year to attract more people.

Amerimold, Novi JUNE 15, 16, 2016 – (Not seeking -GOA funding)

- CAMM will organize a Canadian Pavilion at this show again this year as well as exhibited
- Since the greater Michigan area is one of the core centers in the US for our industry, this show is a vital event, and the leads and interaction at this show was very good. Many of our shops have bid on projects and been awarded them as a direct result of this show
- This event allows our SME' shops to exhibit in a strong Midwestern USA industrial market. By being a part of the Canadian Pavilion it helps to showcase the strength in our Canadian Industry

October 18 - 20, 2016 - IZB in Wolfsburg, Germany with APMA (seeking GOA funding)

- IZB (International Suppliers Fair) is aimed at all automotive industry suppliers and has a prominent reputation in international professional circles. The high-quality exhibitors and large number of key decision-makers and trade visitors that attend the IZB make it an important communication and business platform for the industry.
- CAMM, APMA & the Ontario Government is helping to organize the Canadian Pavilion for 10 Canadian Companies to exhibit.
- Additional activity will include-B2B meetings, plant tours and networking opportunities.
- While this event does not generate a lot of direct leads, the relationships and introductions created carry through to their worldwide operations and these introductions are passed to various regions for further follow-up. This event provides an opportunity to show that CAMM members will invest in their global reach to foster and generate lasting relationships in the long term.

B2B Automotive Meetings & Plant Tours - QUERETARO, MEXICO February 20-22, 2017 (seeking GOA funding)

- Many automotive suppliers as well as aviation and household goods suppliers have production in this area now and it is growing steadily. There is a shortage of skilled help and the area is actively seeking out the services of moldmakers.

Plastec West – Anaheim, California February, 2017 (seeking GOA Funding)

- This show can benefit CAMM members and our industry, especially for those who are seeking to diversify their customer base as this show has little automotive foot print and is very strong in medical, household and packaging markets. It is a growing show that is showing strong potential for Canadian industry.

Years 2017, 2018

It is important that we continue our focus on the markets in Mexico, Southern USA, and Europe. We will continue working with the Provincial and Federal Delegations on Supplier days, and networking events. We will continue having Canadian Pavilions, at shows in Germany, Plastimagen in Mexico, Amerimold in USA, NPE show in Orlando, reverse Trade mission in Windsor with APMA, along with Composite and Technical shows.

We will continue educating our industry on how to do business with European Companies. There is a need for our shops to work with European Mold Tool and Die shops in order to increase their export sales into this market.

We will continue to work with the Off Shore group in helping our shops to set up satellite shops in Mexico and in Southern USA.

We will continue to monitor the Tariff restrictions in Brazil.

The TPP agreement could adversely affect the small to medium size manufacturers because of low costs countries competing in the same local markets without tariffs. The Large Manufacturers should see a benefit as their ability to expand their global foot print and establish new facilities in TPP countries will be much easier. I think that it is important to note that the entire CAMM Membership is small to medium size companies. CAMM feels that the benefits are not apparent in the agreement however we do recognize that to be excluded from the agreement would be far worse.

We will continue to work with Federal and Provincial governments with Supplier Days and trade missions.

YEAR APRIL 1 2017 TO MARCH 31 2018

Plast-Ex – Toronto, ON – May 16 – 18, 2017

- This show is a local show that draws buyers in from the Northern Michigan Companies. It is also a good show for our industry to look at different suppliers and technology in our industry,
- In the past we have worked with EDC and brought in buyers to this event and we will continue to do so in the future.
- This show is also good for our industry to get together and learn how they can collaborate with each other to strengthen their products and sales.

Amerimold, Novi, Michigan June 15-16, 2017 –

- This is a small show but it is very strong in new industry technology, and it is a great arena for our shops to showcase their products to the Michigan market which is very strong going and will continue to grow in strength over the next 5 years.
- This show is an annual show that rotates one year in Chicago area and the next year in Novi – so it continues to draw different OEM and Tier 1 shops
- CAMM will work with member companies to not only exhibit at this show, but to encourage and emphasize companies to also participate in being keynote speakers, host conference sessions and show their technology to receptive audience. The end focus will be to show that Canadian mold shops are leaders in the industry.

APMA / CAMM Conference – June 14-15, 2017 Windsor Ontario

- This show continues to grow in size and in importance. CAMM uses this show as a place for OEM and Tier 1 to come to Canada to visit our shops, B2B meetings and to network with our industry that we meet at different trade shows and events that we attend through out the year
- This show is also an opportunity to strengthen the relationships that we have made over the years with companies in Mexico, Europe and United States.
- This show is also a great venue for government agencies to meet with possible foreign investment.
- CAMM will take a stronger role in participating in and hosting conference sessions to showcase our leadership in advanced technology and strengths in working with OEM and Tier level suppliers.

Plastec South - Orange County Convention Center | Orlando, FL

November 15-16, 2018

- This location is perfect for attracting export sales for our industry with Southern US and Mexico. This show is know for its plastics processing connections and technologies and also for new materials and machinery products for our industry.
- With the growing markets in Southern US States it is important that we continue to exhibit and bring Canadian SME companies with us to shows in this area.

Plastimagen November 7 –10, 2017 – Mexico City, Mexico

- With Plastimagen being the business center of the Mexican plastics industry with more than 1200 exhibitors showcasing the latest in technology, machinery and worldwide plastic solutions and drawing approx 40,000 attendees related to the plastic industry, this is a must attend show for our industry to help with export opportunities in this fast growing area.
- CAMM again will be setting up a Canadian Pavilion and will be working with Trade
- Commissioner David Valle to orchestrate B2B and networking opportunities.
- Our Canadian pavilion continues to grow at that show, and it continues to help our SME with maintaining work in this area. We will continue to monitor this show, and we will continue to attend this show as it is very profitable for our Industry.
- Expanded participation in Show Floor Presentations (in Spanish and English) will provide our members with increased awareness and publicity throughout the show.

Fakuma –October 17–21, 2017 - Friedrichshafen, German

- It is important that we exhibit and continue to have a strong presence in Germany. There has been a shift in trade shows in Germany and in the past year we have checked out 3 shows in Germany and have decided that this is the Show that we need to have a presence in 2017. We had people walk this show in 2015 and we will exhibit at this show in 2017.
- In it's over 30-year history, the Fakuma international trade fair for plastics processing has become a prominent meeting place for the industry, with international charisma. It holds second place in the overall ranking of international trade fairs for plastics. However, because of the organisation cycle, it is the principal event for the industry in Fakuma years.
- Fakuma offers a comprehensive overview of all plastics technologies; whether injection moulding – Fakuma holds a top international position here – extrusion technology or thermoforming: the user can find out specifically about all processes machines and tools that are relevant for the working and processing of plastics. The focus here

is on practice, as around 1,700 exhibitors present the entire process chain for the economic production of plastic components.

- Fakuma, being the 2nd largest international plastics shows is a great opportunity to further enhance our Canadian expertise to a worldwide market as attendees from 120 countries go to this show. CAMM will increase our participation at this show by exhibiting, with more Canadian reps in attendance, and a larger presence overall at this show.

APRIL 1 2018 TO MARCH 2019

NPE - May 7 – 11, 2018, Orlando, Florida expand

- This triennial show showcases our members very prominently; we are aiming to have 30+ members exhibiting. With our prime location in this very large show (65,000+ attendees, 1100 exhibitors our Industry does very well at this show securing new business and lucrative export contracts As our Canadian Dollar continues to stay below the 80 Cent mark this is a strong advantage to doing business in the USA
- This show draws buyers from around the world
- Along with meeting potential business, this show has the latest in machinery and in products
- This is another show where not only will we have increased numbers of Canadian exhibitors, but also more involvement with conference sessions to increase our awareness to the industry of our capabilities.

Amerimold, Chicago, Illinois - June 15-16, 2018

- As stated above this show rotates from Novi Michigan to Rosemount (near Chicago)
- This is a small show but it is very strong in new industry technology, and it is a great arena for our shops to showcase their products to the Michigan market which is very strong going and will continue to grow in strength over the next 4 years.
- CAMM plans to expand our presence at this show due to its close proximity to the majority of our traditional client base and as more customers are shying away from their low cost country sources, this show is important for us to not only participate in, but also for our members to participate in as well

APMA / CAMM Conference – June 14 15, 2018 Windsor Ontario

- This show continues to grow in size and in importance. CAMM uses this show as a place for OEM and Tier 1 to come to Canada to visit our shops, B2B meetings and to network with our industry that we meet at different trade shows and events that we attend through out the year
- This show is also an opportunity to strengthen the relationships that we have made over the years with companies in Mexico, Europe and United States.
- This show is also a great venue for government agencies to meet with possible foreign investment.
- CAMM will take a stronger role in participating in and hosting conference sessions to showcase our leadership in advanced technology and strengths in working with OEM and Tier level suppliers.

Plastimagen – Mexico City – November 2019

- With Plastimagen being the business center of the Mexican plastics industry with more than 1200 exhibitors showcasing the latest in technology, machinery and worldwide plastic solutions and drawing approx 40,000 at-

tendees related to the plastic industry, this is a must attend show for our industry to help with export opportunities in this fast growing area.

- With an ever increasing wave of production moving from China to Mexico expected, it is imperative that we stay well connected to this show by exhibiting (CAMM and members in general)and participating in show floor presentations and most especially arranging B2B meetings.
- CAMM again will be setting up a Canadian Pavilion and will be working with Trade Commissioners
- We will continue to work with the Trade Commissioners in this area to enhance this event for our shops.
- Expanded participation in Show Floor Presentations (in Spanish and English) will provide our members with increased awareness and publicity throughout the show.

VW's Chattanooga expansion moves ahead Appendix A

Volkswagen, a key supplier and local governments are scheduled today to move ahead on the Chattanooga plant expansion, even as the carmaker faces headwinds because of the emissions scandal.

The buying of new plant equipment, finalizing land transactions and signing off on the state's \$165.7 million grant for the automaker's \$600 million project are among several deals the city's Industrial Development Board will consider.

Tennessee state Sen. Bo Watson, who on Thursday will be chairman of a legislative hearing in Chattanooga on the sustainability of the state's investment in the VW plant, said Monday his expectation is that the expansion to produce a new SUV is moving forward.

"I haven't heard anything different," the Hixson Republican said.

Watson said he thinks introducing a new midsize SUV to the North American market "has the potential to be the great salvation for Volkswagen" in the wake of the emissions-rigging issue.

VW, which officially started the expansion in January, plans to begin assembly of the SUV in late 2016, the company has said.

The city's Industrial Development Board, which oversees the spending of city, Hamilton County and state grant money on the VW project, is expected to approve the expenditure of \$2.5 million with Hirotech America for the plant expansion.

The company's scope of work involves new equipment, fixtures and work station modification to the plant body shop's closure line. The line is where the SUV's hood, doors and fenders are to be secured to the vehicle's body.

Also today, the board is to sign off on the \$165.7 million state grant related to infrastructure for the VW project. This includes \$140.6 million for body, paint and assembly shop equipment.

Additionally, the Industrial Development Board will weigh approval of several property-related resolutions involving Spanish supplier Gestamp, which has announced plans to invest \$180 million more in Hamilton County related to the SUV. The amount, a record for an automotive supplier in the county, will fuel creation of 510 more jobs, according to the company that already employs about 300 people here.

The board will finalize a deal related to a tract on which the supplier is to build a new plant next to the automaker's factory. The property next to VW's supplier park will revert to Volkswagen instead of the city and county if Gestamp doesn't move ahead, said Paul Parker, the county's real property manager.

Gestamp, which started operating at Enterprise South industrial park in 2009, makes stamped parts and welded assemblies for the Passat sedan. The new plant will press body sheetmetal and chassis components for the SUV.

In addition, Gestamp has bought the former Farley's & Sathers plant on Jersey Pike.

The Chattanooga Area Chamber of Commerce has said the new Gestamp plant will introduce a process for the first time in the South called hot-stamping technology. The technique allows metal to become lighter, but harder.

"Nothing's changed that we're aware of," said Sybil Topel, the chamber's vice president of communications, about the VW expansion.

In addition to infrastructure money, the state is providing \$12 million for training related to the VW project.

Also, the city and county are granting \$52.5 million to the VW project. Moreover, the city and county are providing \$33 million in estimated property tax breaks for the expansion over the next decade.

However, The Wall Street Journal reported Monday that analysts have slashed their outlook on Volkswagen's global earnings and expect the company to report a loss in the third quarter in the wake of the emissions cheating.

VW, which presents earnings for the three months to September on Wednesday, has taken a \$7.18 billion charge against earnings to pay for a global recall of up to 11 million vehicles.

That will push the company into the red, according to a consensus of analysts polled by The Wall Street Journal.

Volkswagen AG lost the lead in global auto sales to Toyota Motor Corp. after claiming the No. 1 spot three months ago, as the German carmaker braces for consumer blowback from an emissions-cheating scandal, according to Bloomberg.

Toyota said it sold 7.49 million vehicles this year through September, topping the 7.43 million that Volkswagen reported earlier this month. Deliveries declined 1.5 percent for both Toyota and Volkswagen.

Contact staff writer Mike Pare at mpare@timesfreepress.com or 423-757-6318.

Nissan making new Altima sedan at Southern plants Appendix B

SMYRNA, Tenn. - Nissan is launching production of an updated version of the mid-sized Altima sedan at assembly plants in Smyrna, Tennessee, and Canton, Mississippi.

The Japanese automaker's U.S. plants have combined to make more than 5.5 million Altimas since 1992.

The Smyrna plant — which is North America’s highest-producing auto factory — began making the updated Altima on Monday. Canton is scheduled to follow suit next week.

The Altima was last redesigned for the 2013 model year. The mid-cycle makeover includes a redesigned front and rear fascia, grille and lights. The car has a standard fuel economy of 39 highway miles per gallon.

Nissan sold more than 262,000 Altimas through the first nine months of the year, a 2 percent increase.

The 2016 Altima will go on sale next month.

SaarGummi Tennessee expands in Pulaski, Tenn. Appendix C

PULASKI, Tenn. — SaarGummi Tennessee, Inc. officials expect to create more than 150 new jobs over the next five years as the company improves infrastructure and adds equipment at its manufacturing operations in Pulaski.

SaarGummi manufactures extruded and injected molded elastomer products for the automotive industry. The company operates worldwide out of 15 locations in Europe, North and South America and Asia with a total of approximately 5,000 employees.

“SaarGummi Tennessee is supplying advanced technology products on the highest quality level, and has proven in the last few years that we are a reliable partner for the local automotive industry,” SaarGummi North America COO Markus Wittmann said. “As a consequence, I am excited to see a remarkable growth of business for our facility in Pulaski, Tennessee.”

“We are very pleased with the growth of our local industries over the past couple of years,” said Pulaski Mayor Pat Ford. “SaarGummi Tennessee is yet another shining example of success within our industrial family. We are excited that SaarGummi Tennessee has decided to expand in Pulaski, adding a major investment to our community, as well as provide a good number of well-paying jobs for our citizens.”

The Staffmark office at 1197 W. College St. in Pulaski will handle hiring for the company.

Source: Tennessee Department of Economic and Community Development

German-based company to create 110 jobs in Kentucky Appendix D

By - Associated Press - Thursday, October 29, 2015

BOWLING GREEN, Ky. (AP) - Kentucky officials say a German-based auto supplier will create 110 jobs in Bowling Green as part of the company’s \$130 million investment.

Gov. Steve Beshear’s office says the steel processor will build a 250,000-square-foot cold-rolling steel manufacturing facility at the Kentucky Transpark in Warren County in south-central Kentucky. The plant will serve the company’s North

American automotive industry customers.

The investment by the Bilstein Group was announced Wednesday.

Beshear's office says that since January 2013, 29 German-owned facilities have announced new locations or expansions in Kentucky. It resulted in more than 1,200 full-time jobs through a collective investment of more than \$488 million.

Overall, the governor's office says Kentucky is home to more than 445 foreign-owned companies from 33 nations, employing more than 89,000 people.

Toyota is now making a Lexus in Georgetown, Ky. Appendix E

By Louisville Business First Report

Motor Corp. (NYSE: TM) is now producing the Lexus ES 350 at its plant in Georgetown, Ky.

The company unveiled production of the vehicle during an event Monday afternoon at the plant, where the Toyota Camry, Avalon and Venza also are produced. The new vehicle comes after a \$350 million investment by the company.

Upgrades at the plant have been incoming during the last two and a half years, according to a news release. Toyota also added 750 jobs related to the launch. The company estimates 1.5 million hours were spent on training related to the new vehicle. That included trips to Japan for many to learn about Lexus craftsmanship.

"Localizing Lexus production is in line with our North American production strategy and is rooted in our philosophy of building cars where we sell them," Toyota North America CEO Jim Lentz said in the release. "The Kentucky plant is known for being one of the top vehicle manufacturing facilities in the world. With our talented team in Georgetown building our popular ES 350, we're positioned to better serve our U.S. customers now and well into the future."

With the addition of the Lexus units, the Kentucky plant will have capacity to build more than 550,000 vehicles a year. Total employment there is 7,500, the release said.

"For Lexus to have the confidence in our Kentucky work force to build this magnificent car speaks volumes," Gov. Steve Beshear said in the release. "These additional 50,000 vehicles are further proof that the state of Kentucky is a great place to do business for the automotive industry."

