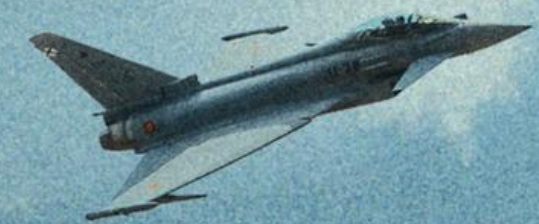




Andalusian Aerospace Sector 2025 report





10 aerospace milestones in 2025

01

Airbus is ramping up production of its commercial programs, reaching a total of 793 aircraft delivered

02

The Spanish government is launching the Industrial and Technological Plan for Security and Defense (PITSD), backed by an investment of 14,200M

03

ESA BIC Andalucía launches its First Call for Proposals aimed at startups and entrepreneurs in the Space Sector

04

Pilatus Aircraft Ibérica opens its new site in Alcalá de Guadaíra (Seville)

05

Celebration of AERO DAY first edition, a new forum that brings together the key players in the aerospace ecosystem, organized by Andalucía Aerospace and Andalucía TRADE



10 aerospace milestones in 2025



06

A specialized Aerospace Training Plan for Andalusia has been developed through a joint effort between the Andalusian Regional Ministry of Employment and the industry

07

The Regional Government of Andalusia and Clean Aviation have signed a cooperation agreement to develop more sustainable aviation technologies, which will provide access to European funds

08

The Advanced Manufacturing Center (CFA) of Andalusia was inaugurated, designed to serve as a key organization for accelerating the digital transformation of industrial SMEs

09

Introducing the SAETA consortium, a strategic initiative aimed at developing the first 100% Andalusian satellite

10

Delivery of the 16th and final C295 for the Indian Air Force, manufactured in Seville



Keys to the aerospace sector in Andalusia in 2026

01

Historic increase in defense budgets to ensure strategic and technological autonomy in Europe

02

Companies in the aerospace sector are facing material shortages, longer lead times, and rising prices

03

Cybersecurity as a challenge for innovation in the sector

04

Attracting and retaining qualified aerospace talent: a challenge for companies

05

A twofold challenge: attracting foreign investment to our region and increasing our companies' exports



Keys to the aerospace sector in Andalusia in 2026

06

The creation of synergies and partnerships among all stakeholders in the advanced transportation sector in Andalusia

07

Support for small and medium-sized companies to help them meet the challenges facing the sector by providing them with more financing tools tailored to their needs

08

Continue making progress toward decarbonization and net-zero emissions by 2050

09

Ensure the sector's growth by improving and expanding the necessary infrastructure, such as available land and energy

10

Aerospace & Defense Meetings Sevilla is establishing itself as the largest B2B business event in the aerospace sector in Southern Europe

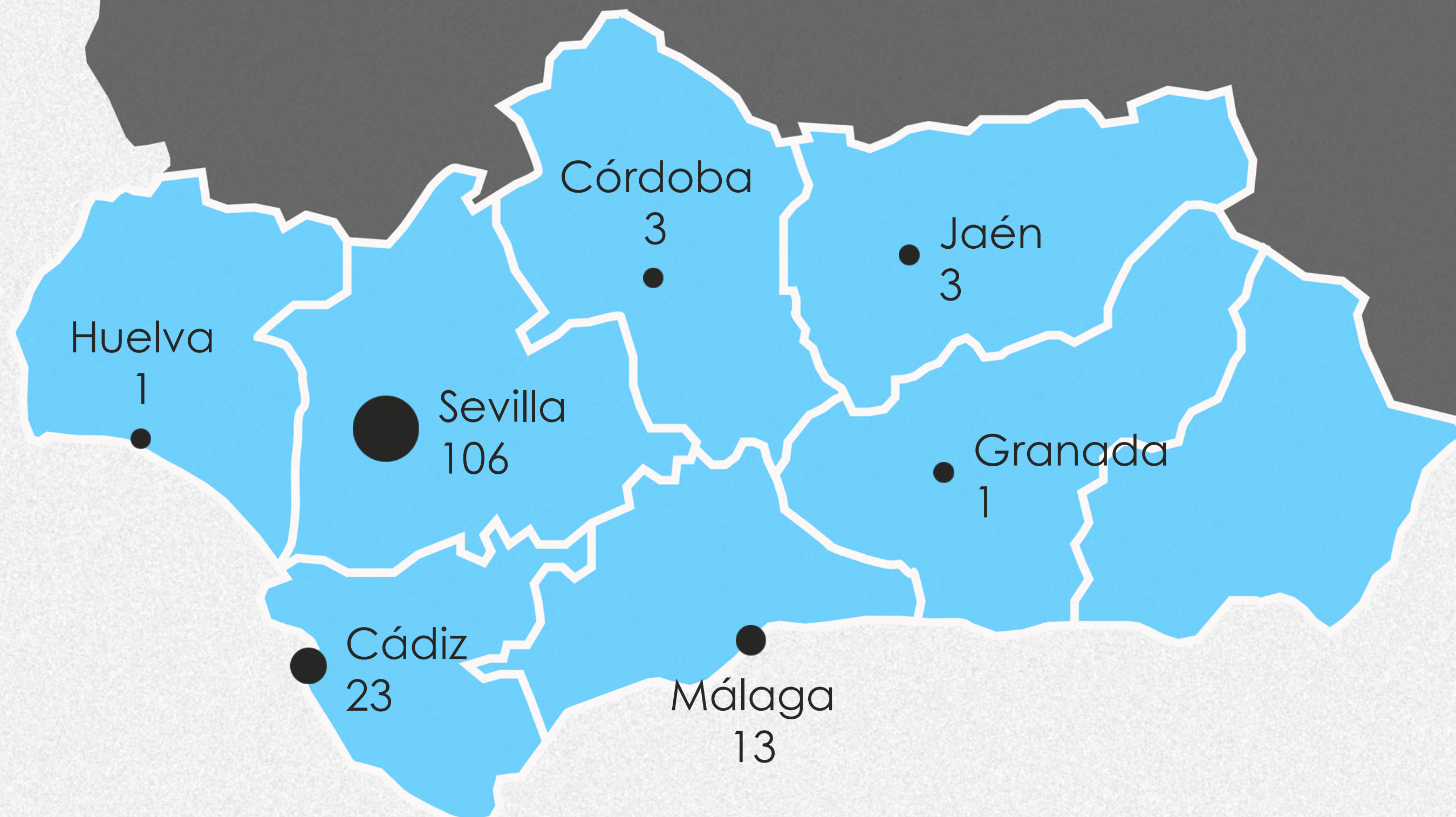


01 Sector structure



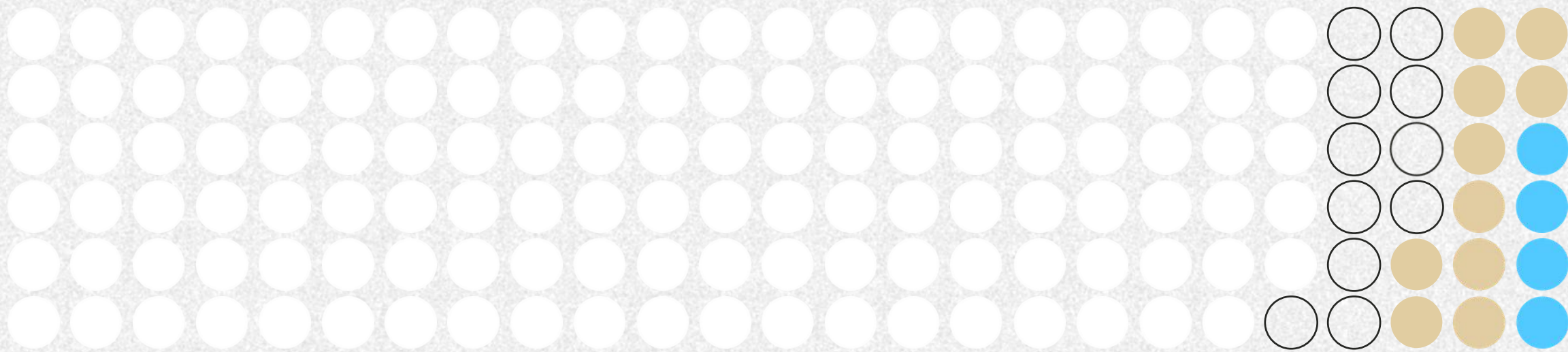
Distribution

150
companies





Number of companies by main segment

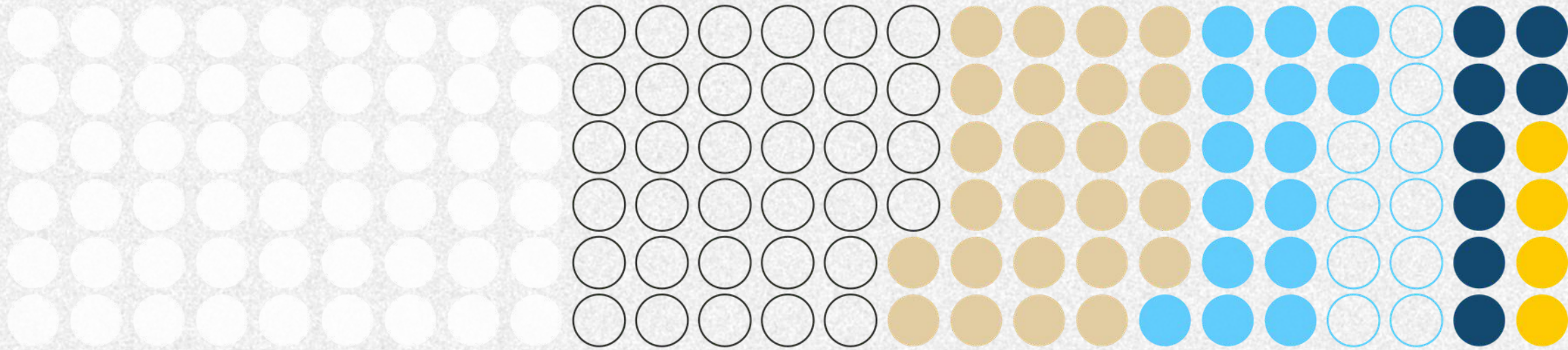


	125	Aeronautic Industry
	11	Aviation and General Aviation (MRO, aircrew training, aerial work)
	10	Space
	4	UAS and Advanced Air Mobility (eVTOL)



Number of companies by main activity

Aerostructures remain the main activity of the sector



- 54 Aerostructures, assemblies and mechanical activities, composites and plastics
- 34 Engineering and consultancy
- 25 Services: logistics, industrial maintenance, training
- 15 Equipment & Systems
- 10 Technical testing and analysis
- 8 Integrator (aircraft, spacecraft, UAS)
- 4 MRO



Company size in the sector

24% Micro



Turnover < 2M€ | Employment: < 10

28% Small



Turnover < 10M€ | Employment: < 50

19% Medium



Turnover < 50M€ | Employment: < 250

29% Large



Turnover > 50M€ | Employment: > 250



Employment and turnover evolution

Tunover in 2025 grew 10,79 % compared to 2024
Employment in 2025 grew 5,78 % compared to 2024

Evolution of turnover* (M€) and employment (No. of employees) in the Andalusian aerospace sector

Year	Turnover(M€)	Employment
2025	3.228	16.391
2024	2.914	15.496
2023	2.743	14.440
2022	2.356	13.136
2021	2.002	12.161
2020	2.071	12.177
2019	2.836	14.507
2018	2.530	15.931
2017	2.612	15.668
2016	2.400	14.460
2015	2.344	13.740
2014	2.244	12.688

*All values that represent sales or turnover have been calculated in aggregate, without taking into account consolidations between companies.



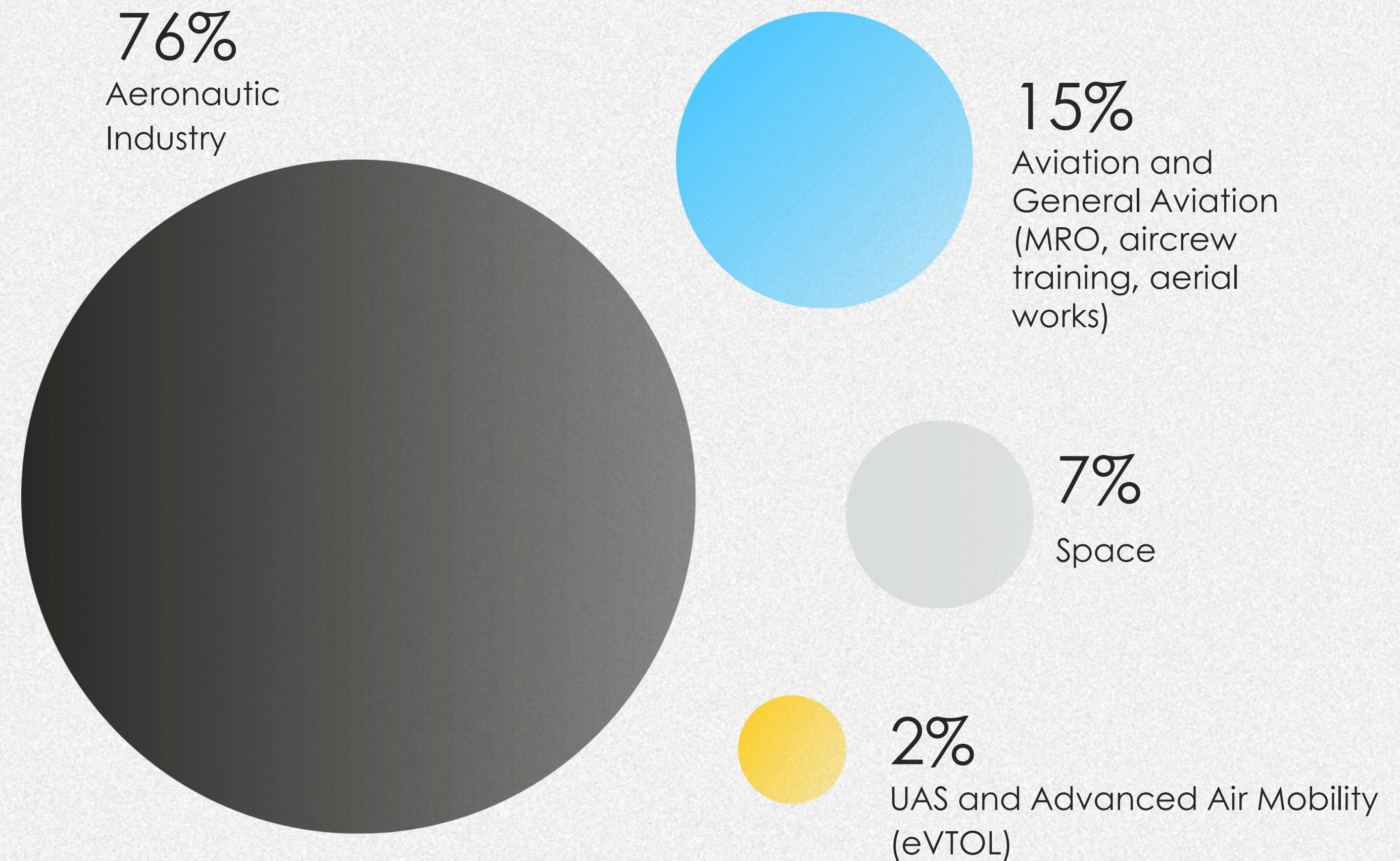


02 Sales



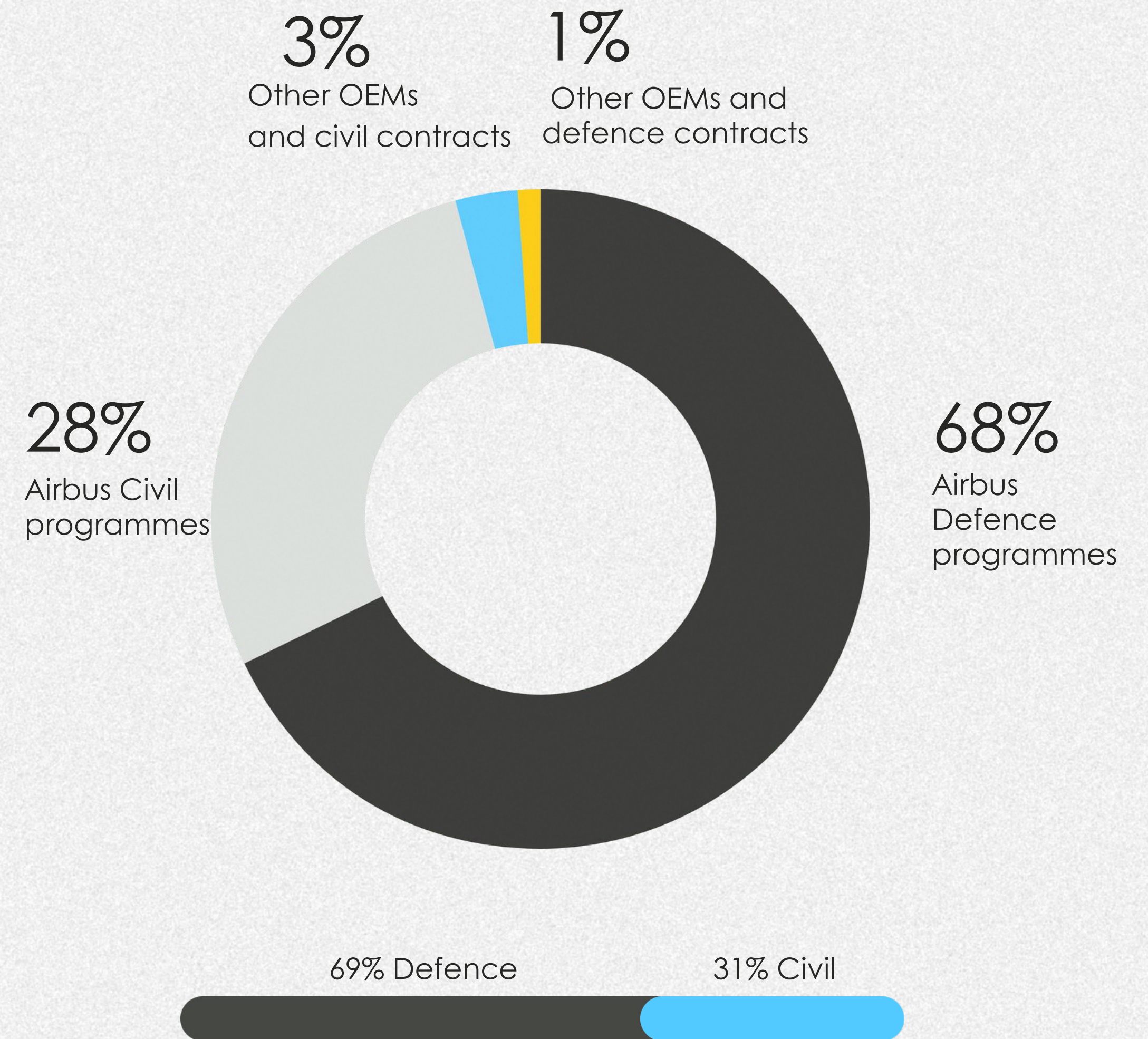


Turnover by market segment (without OEMs)



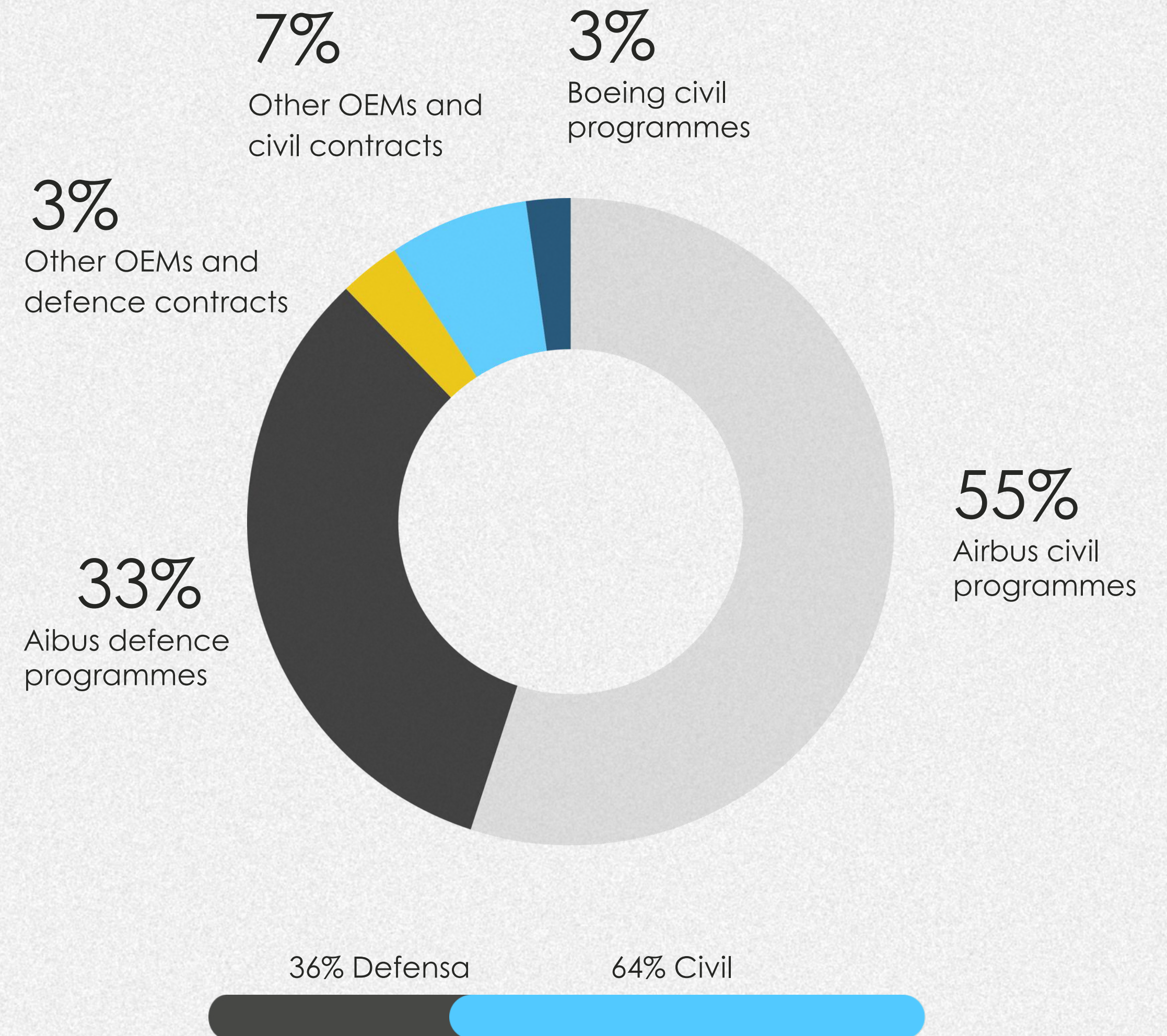


Turnover by programmes of the aerospace industry (with OEMs)



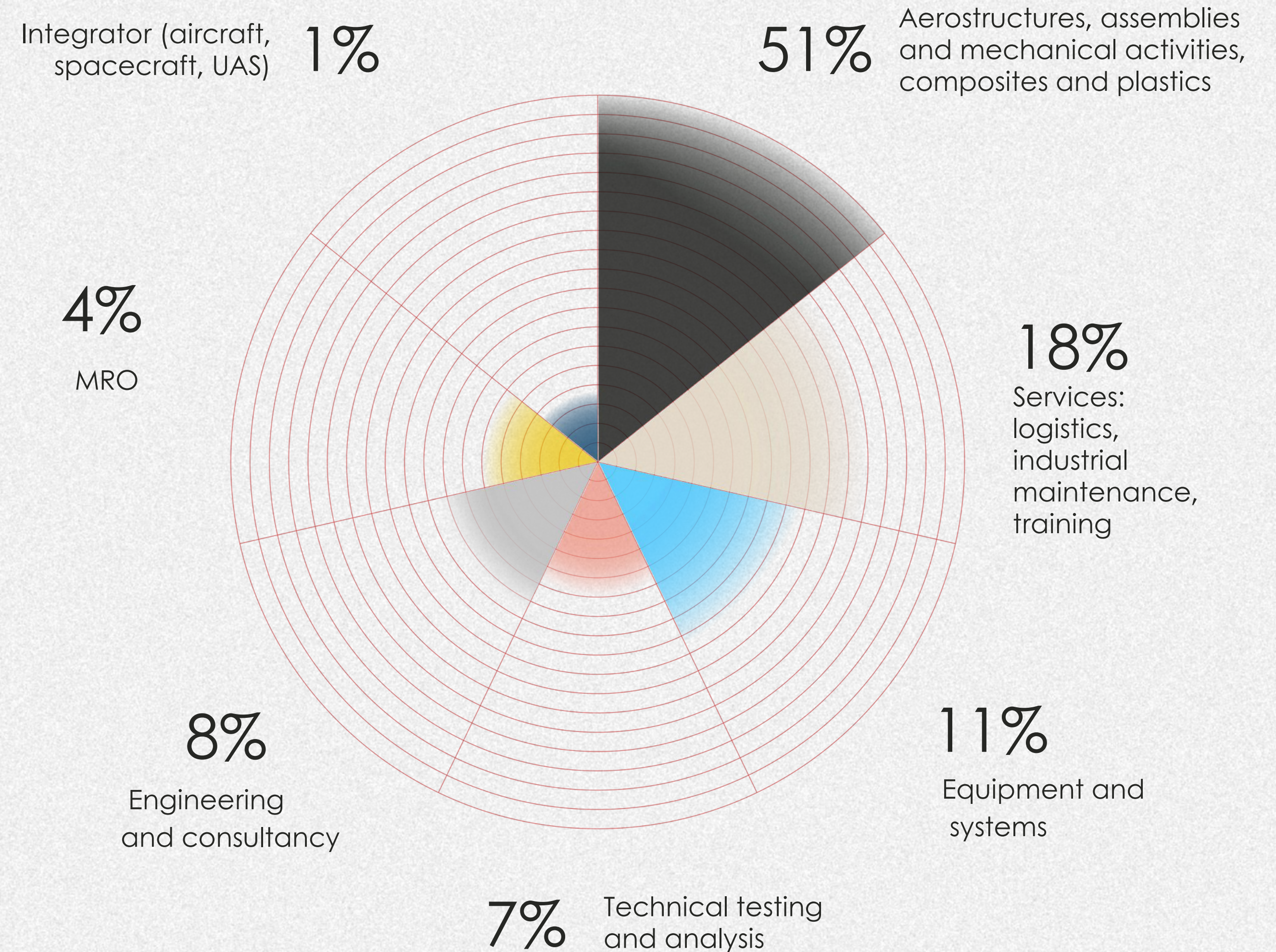


Turnover by programmes of the aerospace industry (without OEMs)



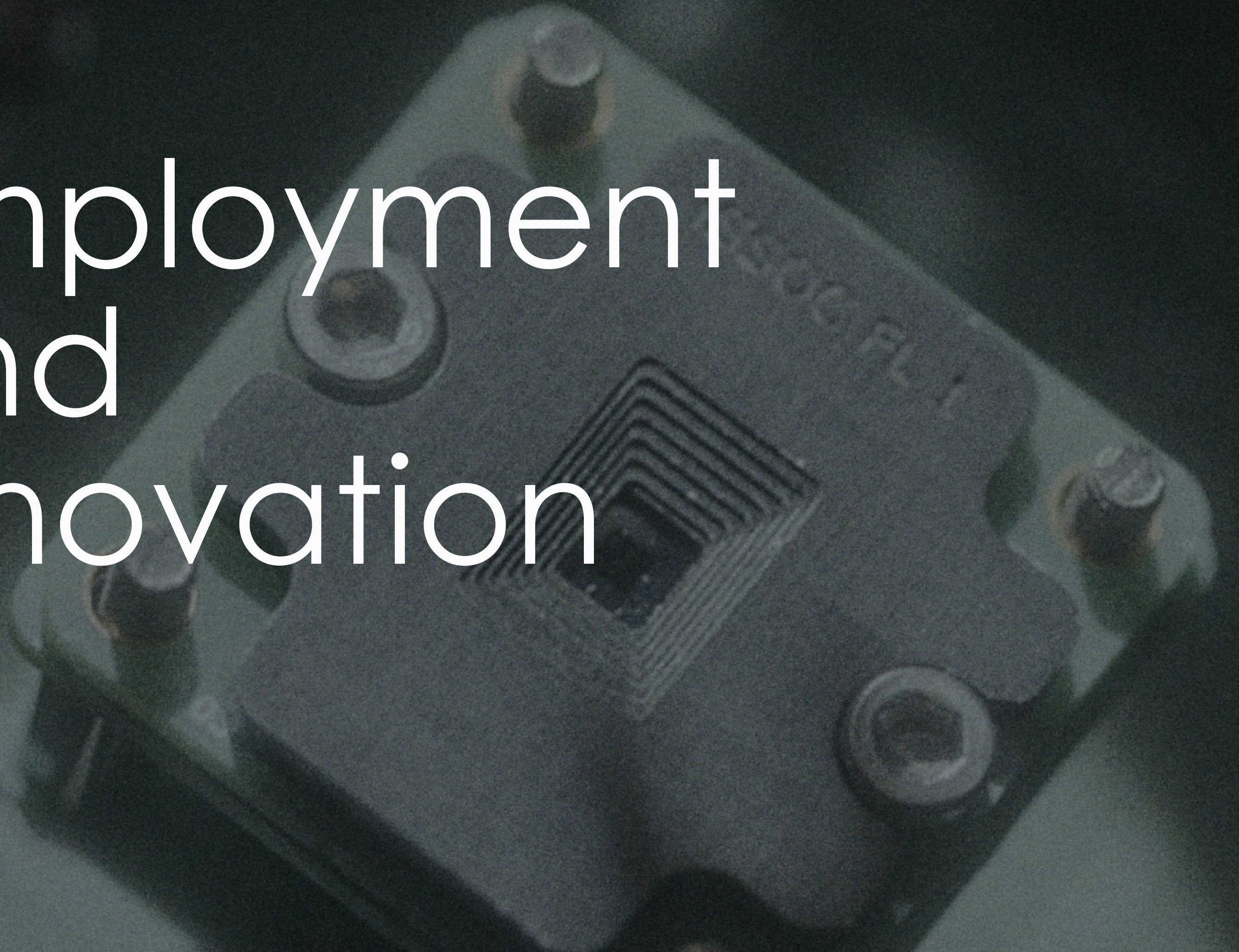


Turnover by activity (without OEMs)





03 Employment and Innovation

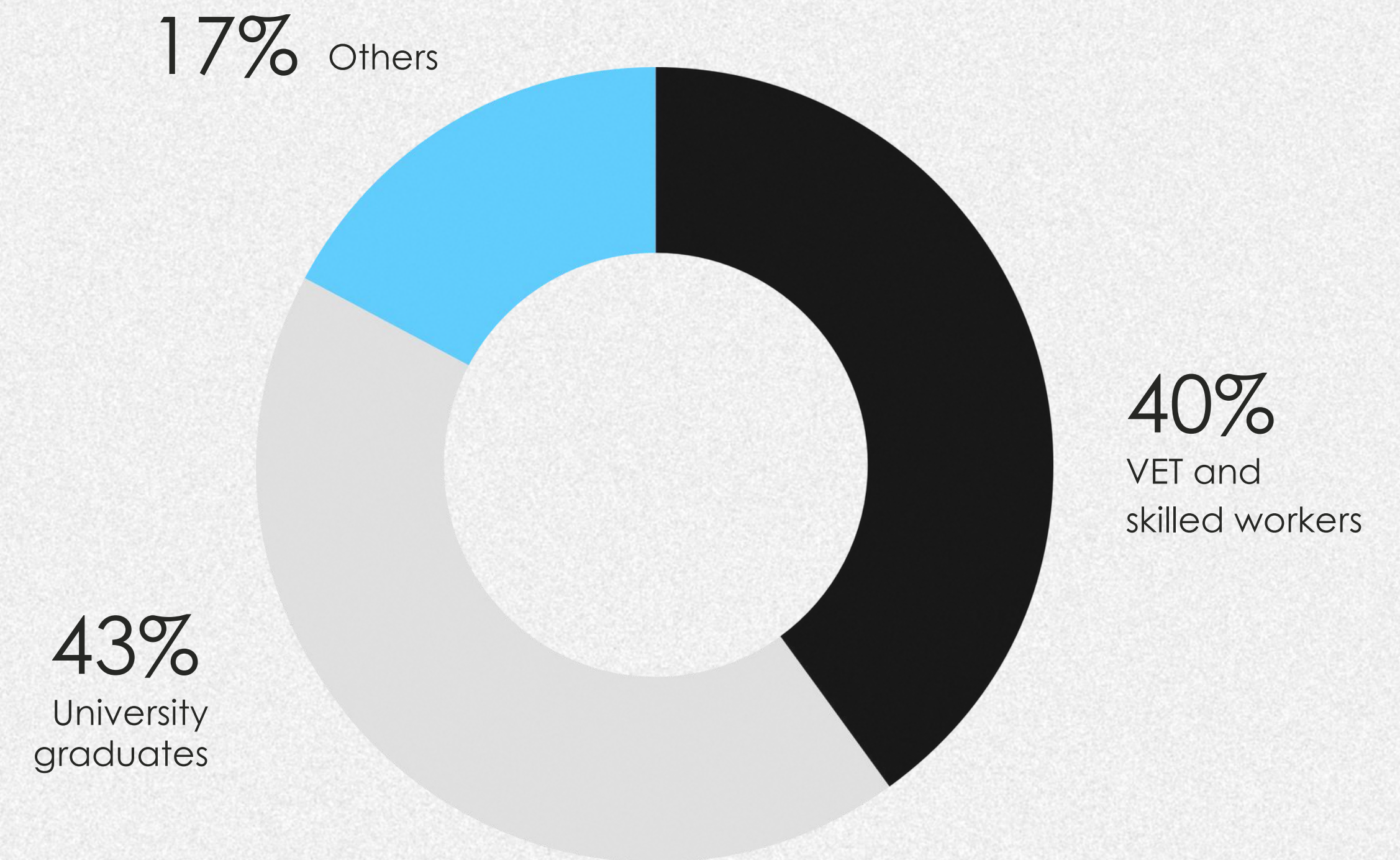




Employment and qualification

Total employment: 16.391

Female employment: 23%

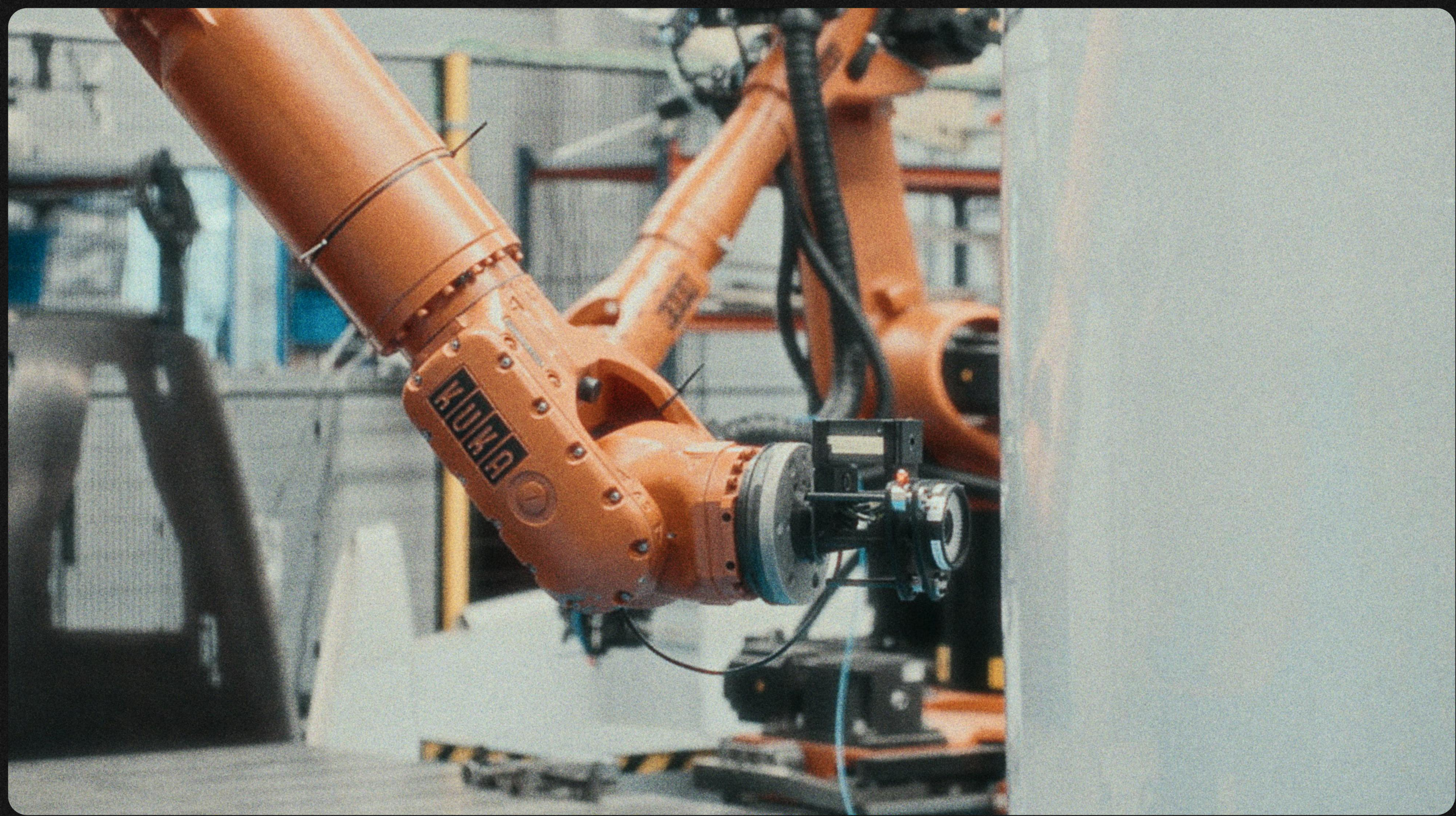




Innovation

R&D Investment in Andalusia: 4,84%







04 Exports and productivity



Exports

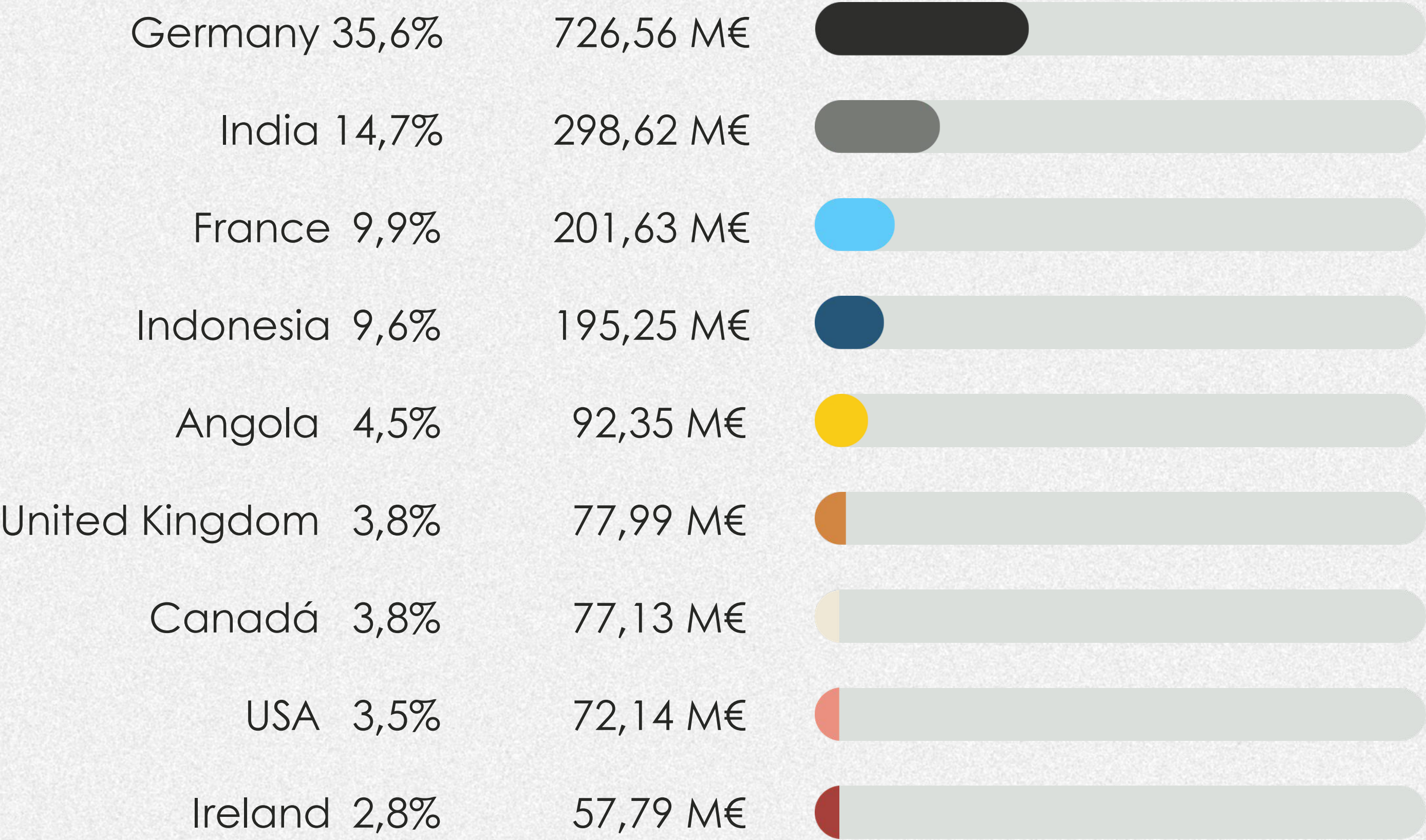
Andalusia represents 38,4% of the Spanish aerospace exports*.

Andalusia, 2nd exporting region in Spain

*Source: Andalucía TRADE

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Exports destinations

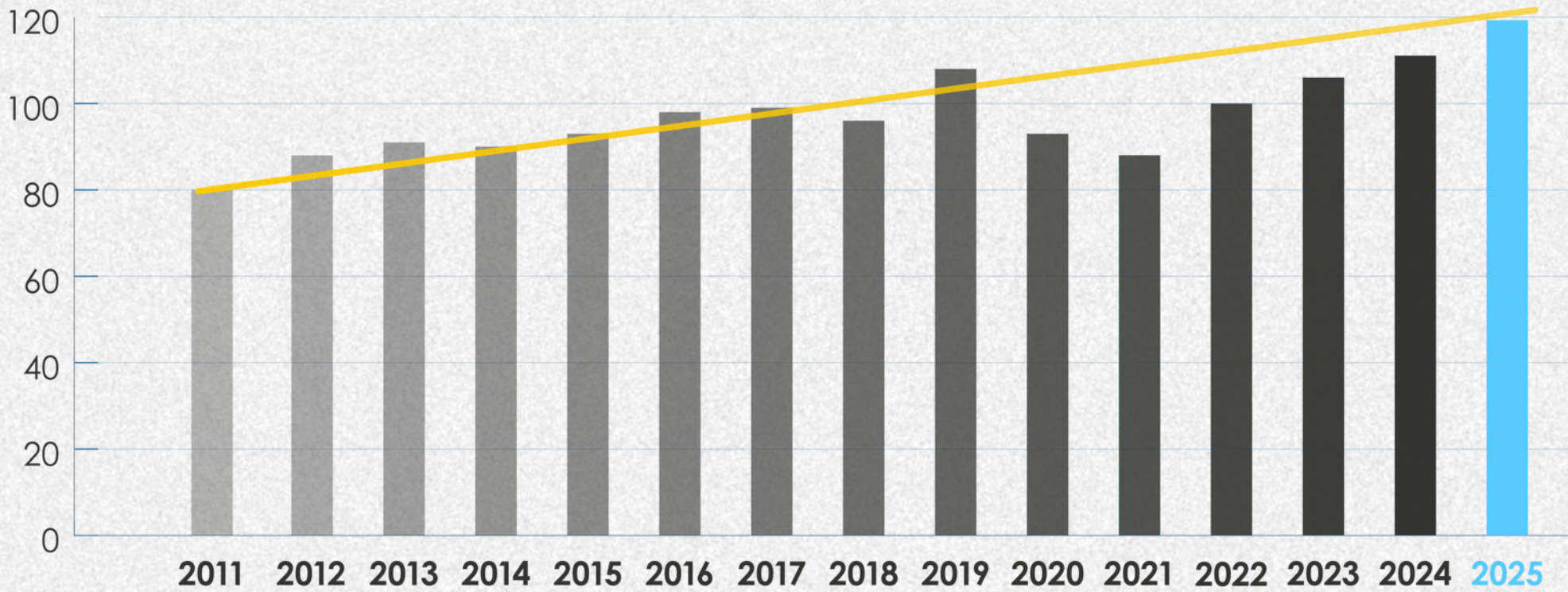




Productivity Evolution
(turnover thousand €/employee)

Productivity

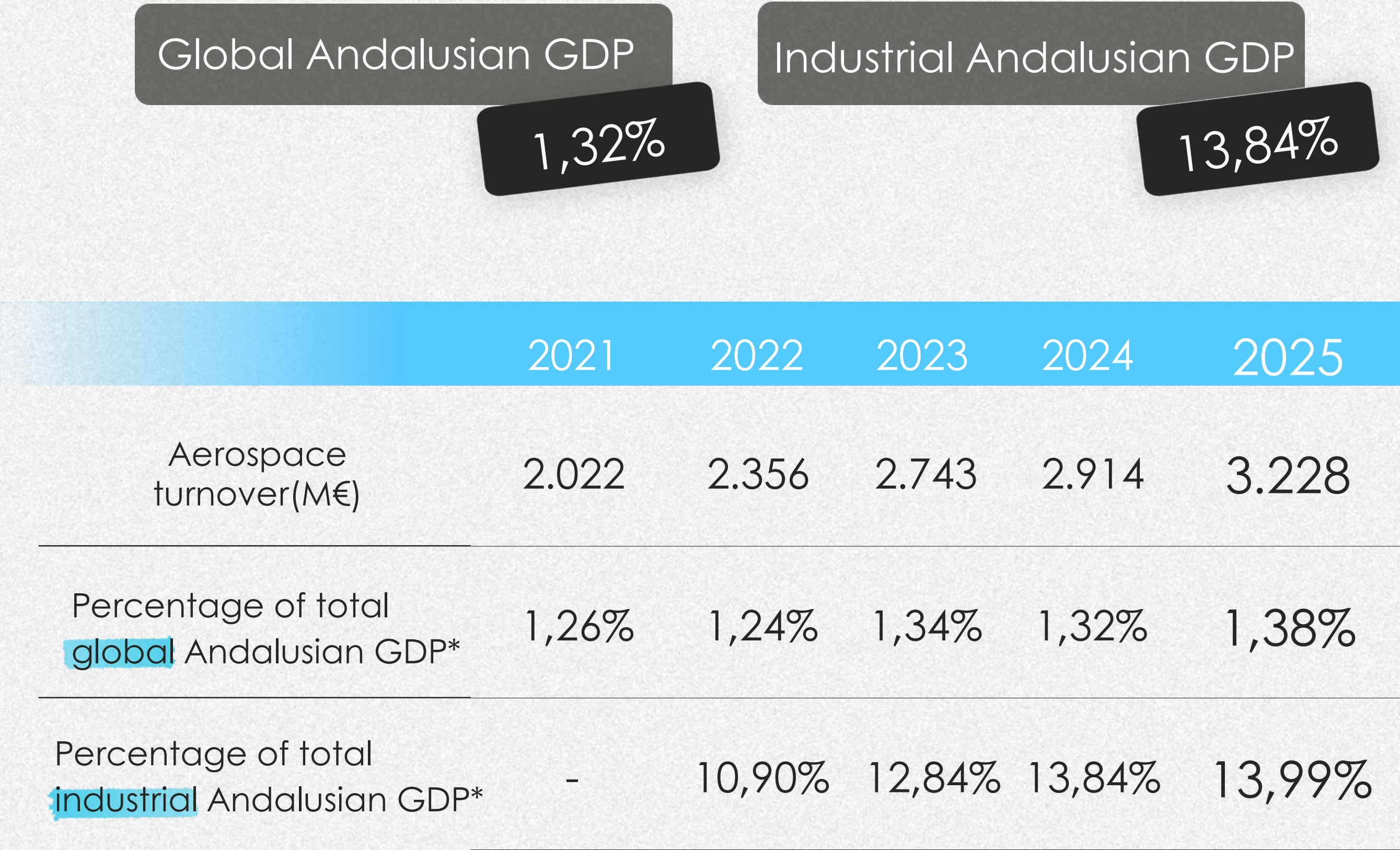
Auxiliary companies average productivity in 2025 grew 6,33% compared to 2024.



Año	Productividad (miles €)
2025	119
2024	112
2023	106
2022	100
2021	88
2020	93
2019	108
2018	96
2017	99
2016	98
2015	93
2014	90



Contribution to GDP



*Source: Andalusian Institute of Statistics and Cartography (IECA)



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