

ANDALUCÍA  
AEROSPACE  
CLUSTER EMPRESARIAL



# Report | 2022

## Andalusian

### Aerospace Sector





# Introduction: Balance of 2022 in 10 news

1

The aerospace sector begins to recover after the pandemic but not at the expected pace due to the war in Ukraine, inflation and the supply crisis.

2

Sevilla nominated to be the headquarters of the Spanish Space Agency

3

The ADM (Aerospace and Defense Meeting) was held in Seville with more than 300 companies and 29 countries represented

4

The aerospace PERTE is approved: €323 million for aeronautical, €1480 million for space and €390 million for transversal.

5

Companies submit R&D projects to the **Andalusian Aerospace Technology Plan (PTA)**, in the second year of its application (three years).



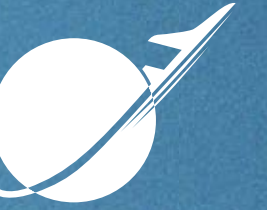
# Introduction: Balance of 2022 in 10 news

- 6 Andalucía Aerospace launches and initiates the first innovation projects as an Innovative Business Group (AEI).
- 7 Work is already underway on the C-295 for India in Seville and the first flight of that aircraft with SAF fuel is carried out.
- 8 Lilium lands in ATLAS to do test flights and trials. The development of urban air mobility is established as a priority objective of the sector.
- 9 The Chinese company Comac delivers the first unit of its C919 aircraft, its first aircraft for commercial flights.
- 10 The Andalucía Aerospace cluster goes beyond 90 associated companies and experience a strong growth in associates..



# Introduction: Andalusian aerospace sector in 2023

- 1 The Space Sector takes off. Commissioning of the Spanish Space Agency in Seville. The Andalusian sector is diversifying taking advantage of the synergies in its technological capabilities..
- 2 We await the implementation of the ANDALUSAT project, a satellite system preferably developed with the technological capacities of Andalusian companies.
- 3 Full recovery of Air Traffic except on transoceanic routes.
- 4 Expectations of Andalusian participation in the EURODRONE program, the European drone.
- 5 The Future Combat Air System (FCAS) begins phase 1B.



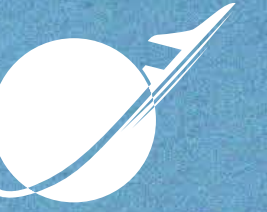
# Introduction: Andalusian aerospace sector in 2023

- 6 The AIRBUS plant in the CBC (Cádiz) grouped, expanded and reinforced with a growth plan.
- 7 We also hope that the announced Advanced Manufacturing Center (CFA) in Cádiz will see the light of day.
- 8 The start-up of CEUS, the largest test center for unmanned flights in Europe, will be great news.
- 9 The Andalucía Aerospace cluster joins the Defense Node proposed by *Junta de Andalucía*
- 10 Provision of 140 million to carry out actions to implement the Andalusian Aerospace Strategy.

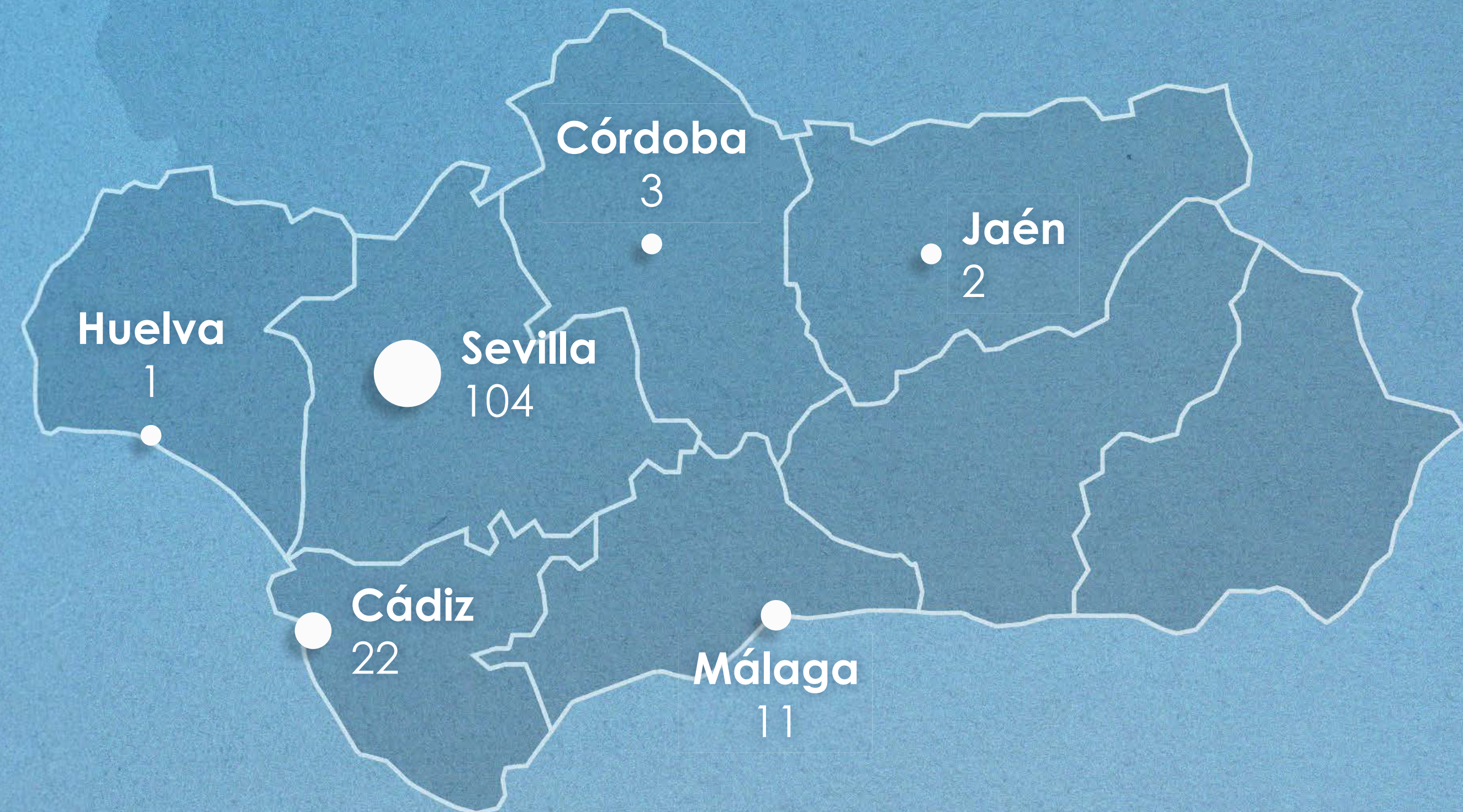


# Sector Structure

# 001



# Distribution: 143 companies







# Number of companies by main segment

▪ 120

Aeronautical Industry

▪ 11

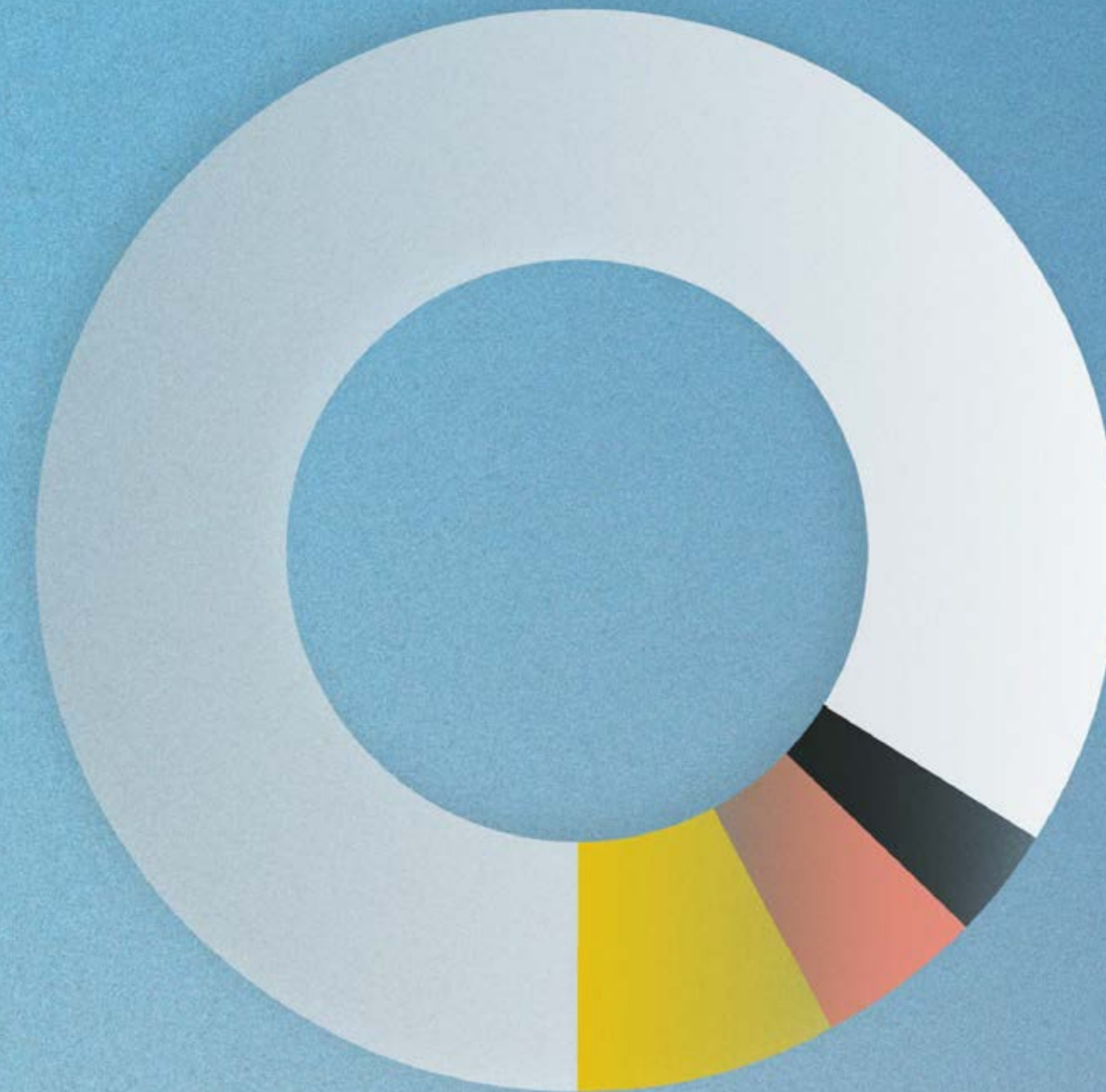
Aviation and General Aviation (MRO, crew training, aerial work)

▪ 7

Space

▪ 5

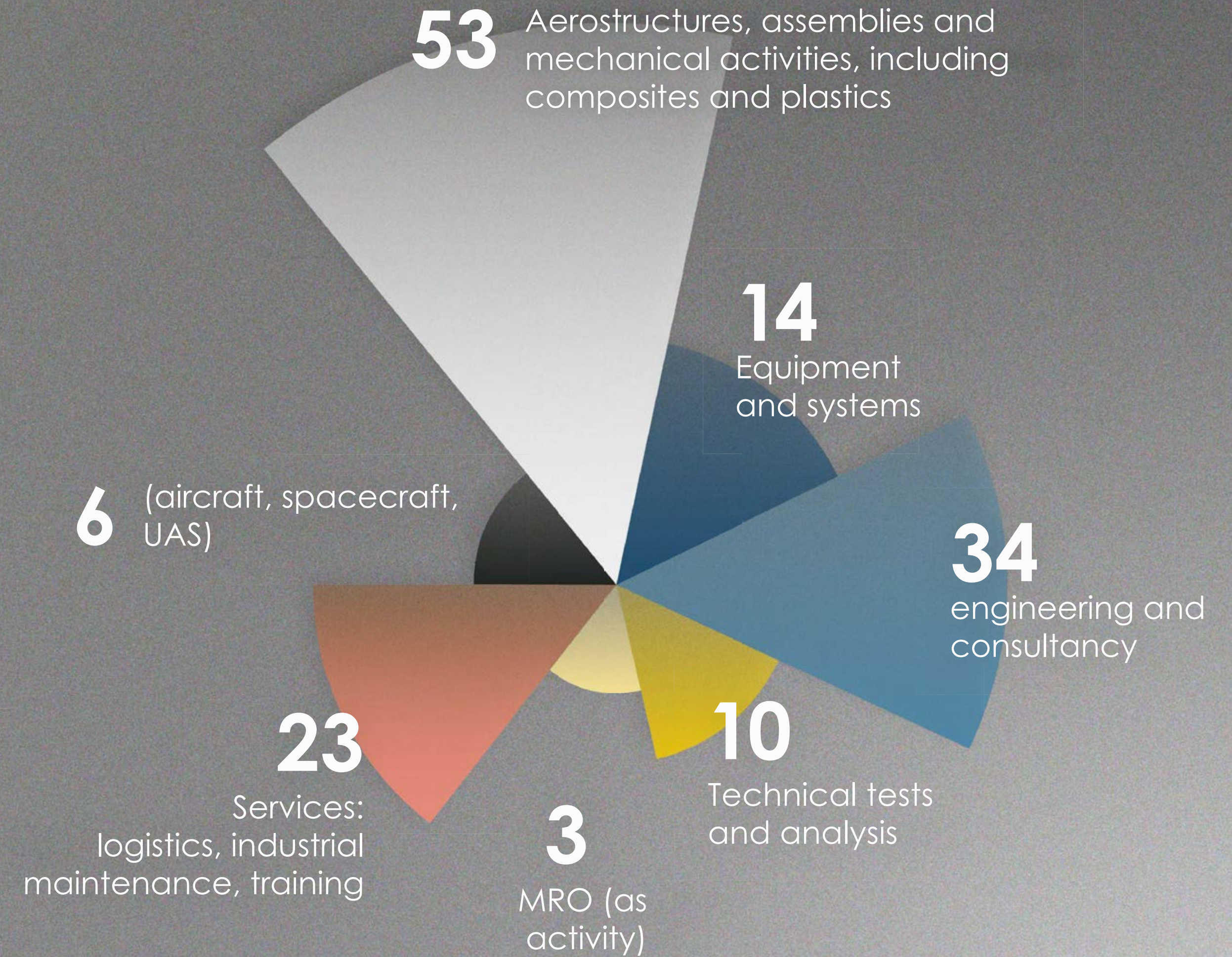
UAS and Advanced Air Mobility (eVTOL)





# Number of companies by main activity

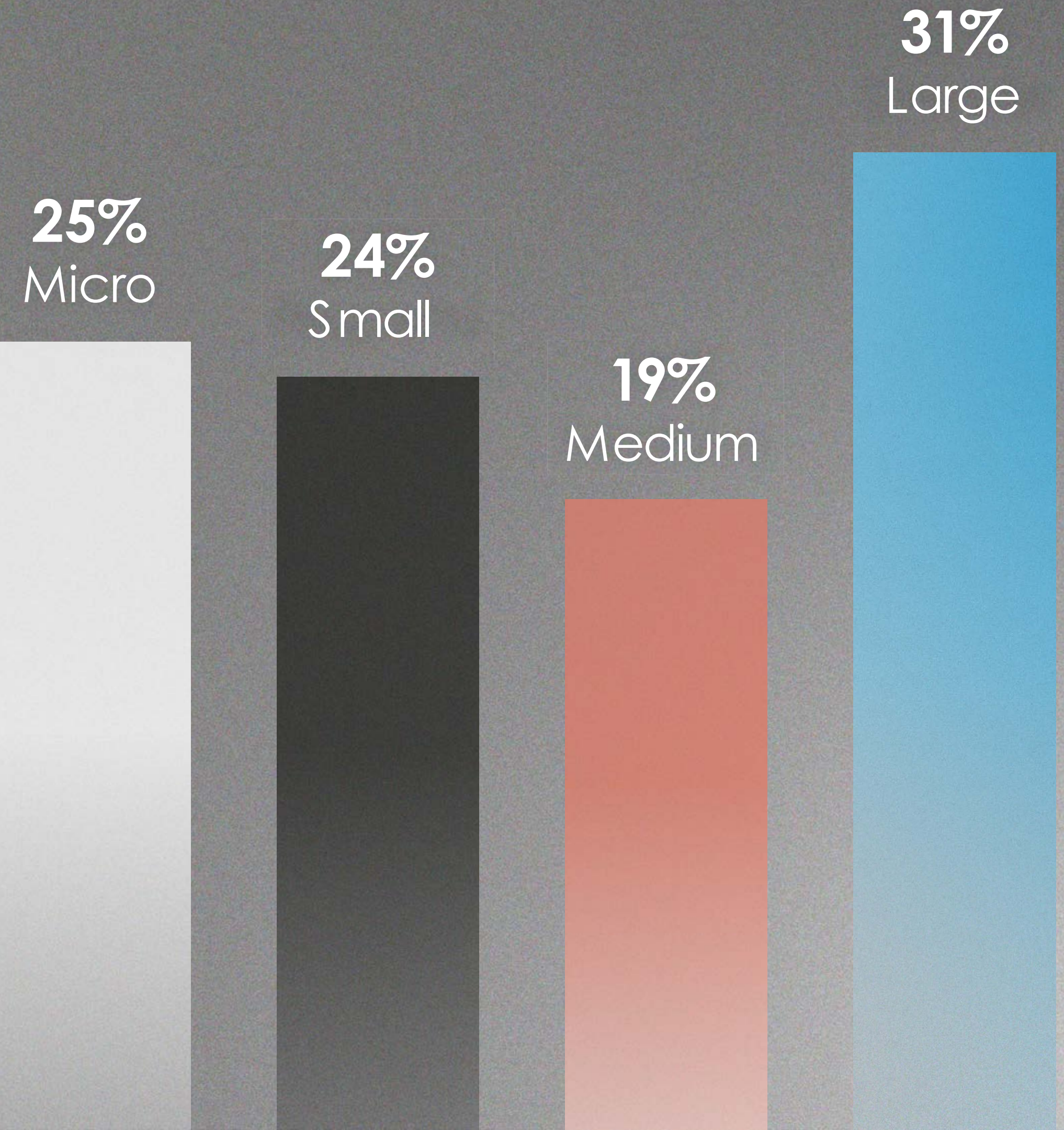
**Aerostructures** remain the main activity of the sector.





# Company size in the sector

	Employment		Turnover
Micro	<10	&	<2 M€
Small	<50	&	<10 M€
Medium	<250	&	<50 M€
Large	>250	or	>50 M€





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

# Evolution of employment and billing

Turnover in 2022 grew by **17%** compared to 2021

In 2022 employment increases by **8%** compared to 2021.

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

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Año	Facturación (M€)	Empleo
<b>2022</b>	<b>2.356</b>	<b>13.136</b>
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
2013	2.060	11.685
2012	1.858	11.290
2011	1.754	10.802
2010	1.983	10.278



# Evolution of employment and turnover

Year comparison  
**2022 - 2019** (pre pandemic).

	Turnover (M€)	Employment
2022	2.356	13.136
2019	2.836	14.507
	<b>-16,90%</b>	<b>-9,45%</b>

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# Sales

# 2022



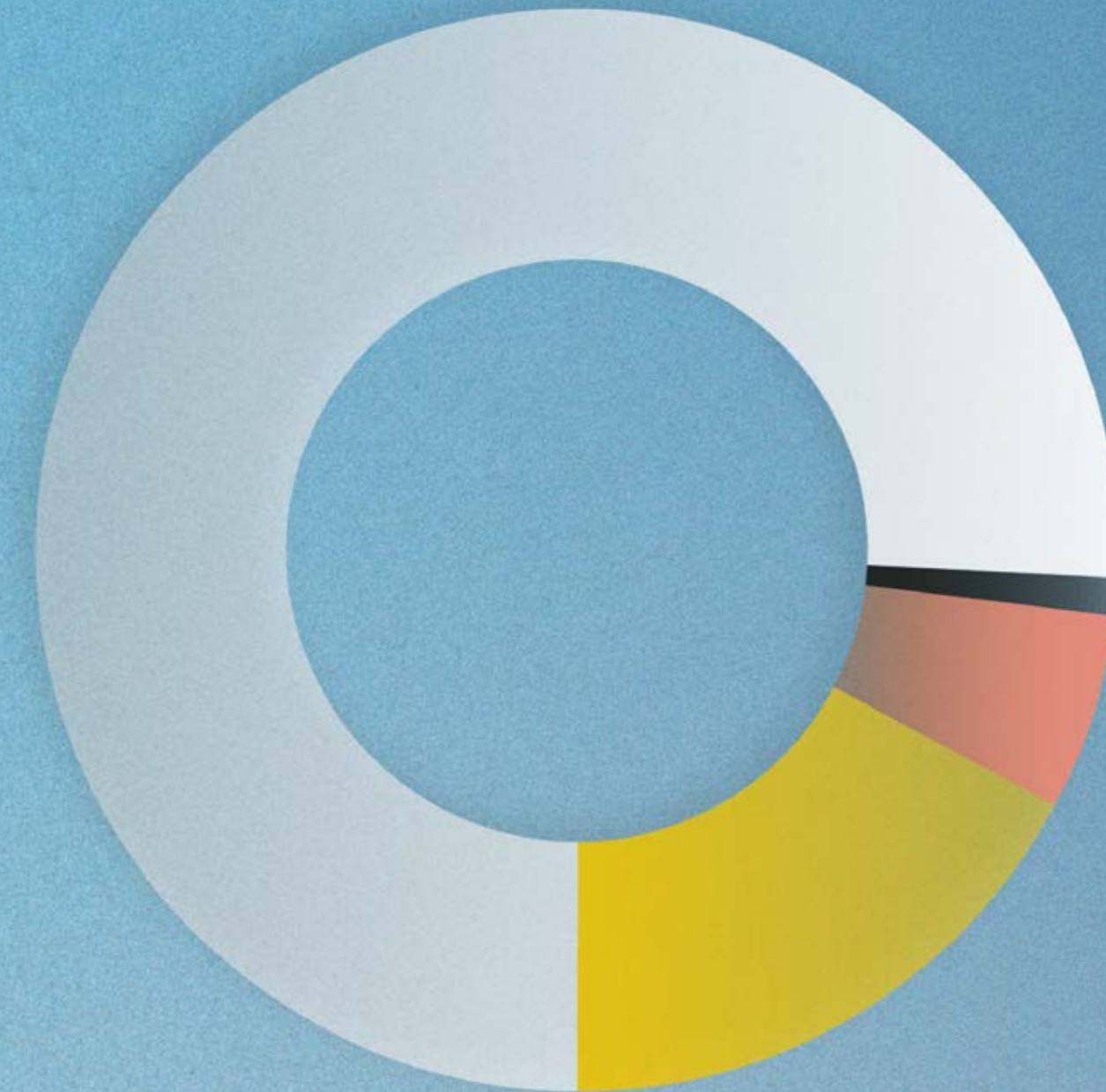
# Turnover by market segment without OEMS

■ **76%**  
Aeronautic  
al industry

■ **17%**  
Aviation and General  
Aviation (MRO, crew  
training, aerial work)

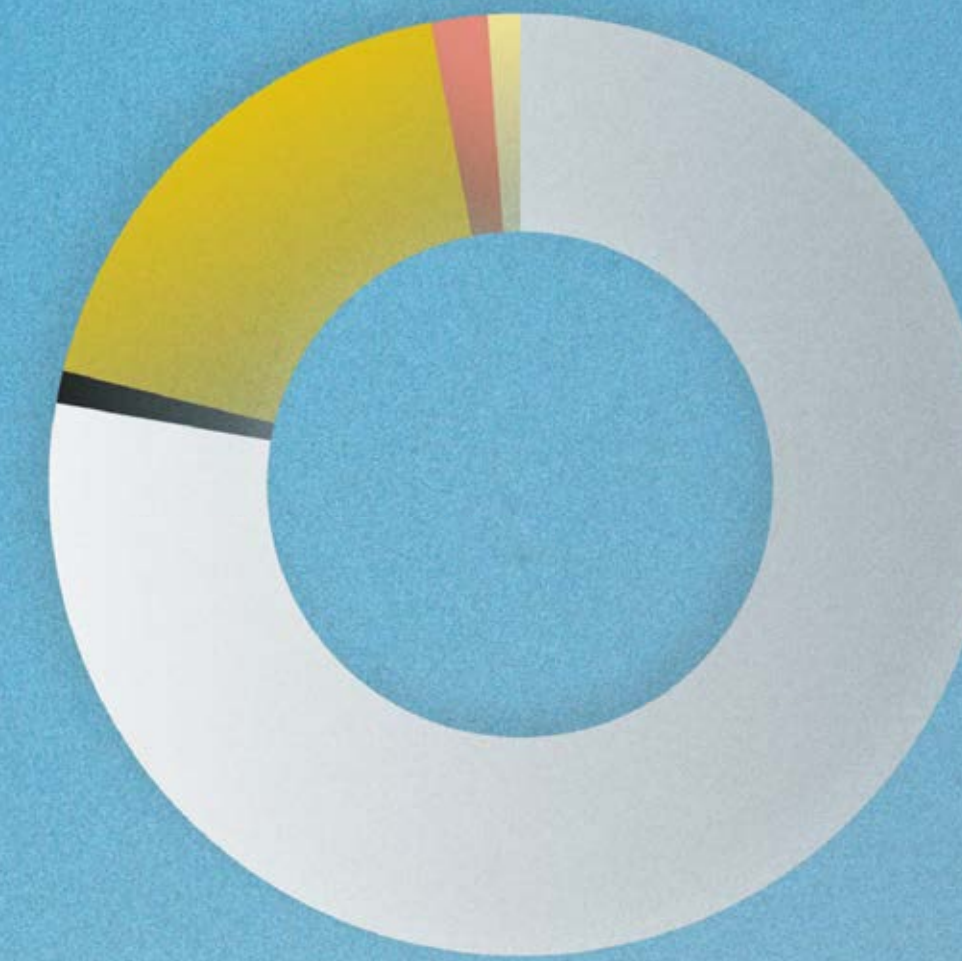
■ **6%**  
Space

■ **1%**  
UAS and Advanced  
Air Mobility (eVTOL)





# Turnover by programs of the aeronautical industry



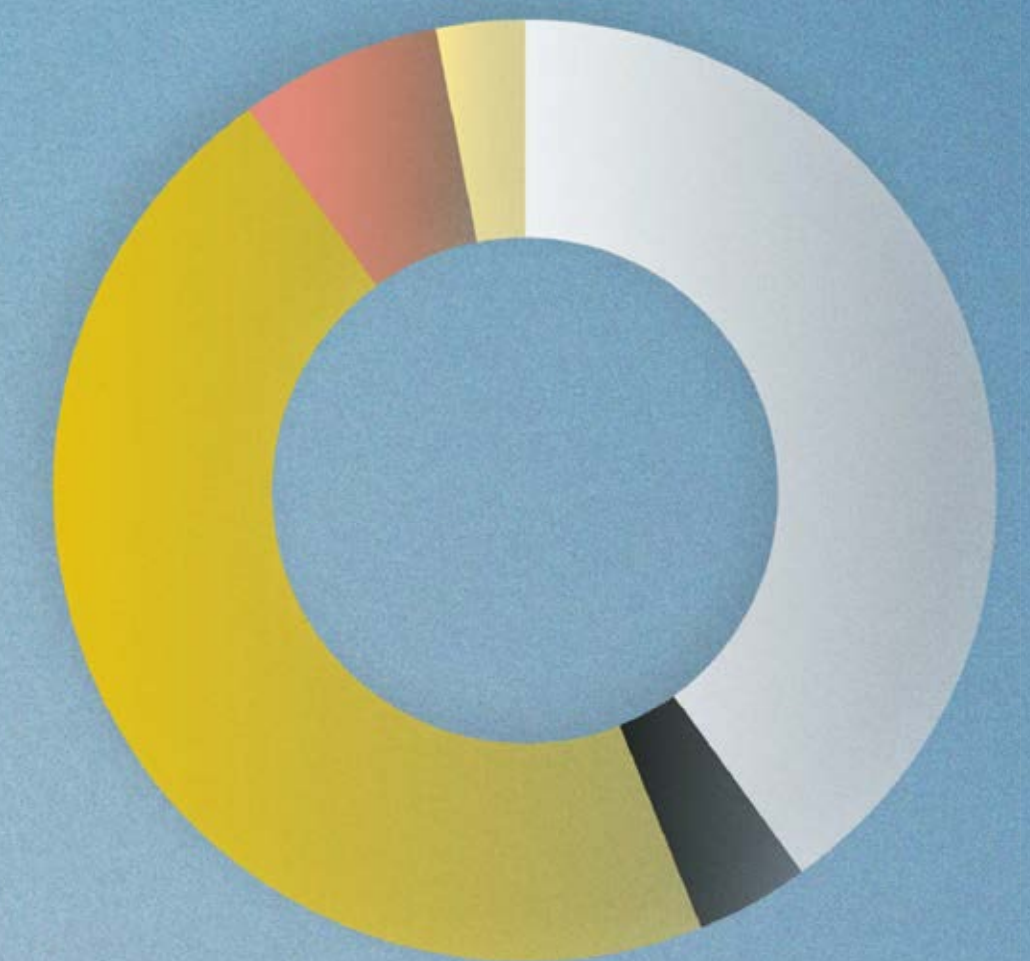
Defense: 79%    Civil: 21%

## Total

- 78% AIRBUS defense programs
- 1% Other OEMs y defense contracts
- 18% AIRBUS civil programs
- 2% Other OEMs y civil contracts
- 1% Boeing

## w/o OEMs

- 40% AIRBUS defense programs
- 4% Other OEMs y defense contracts
- 46% AIRBUS civil programs
- 7% Other OEMs y civil contracts
- 3% Boeing

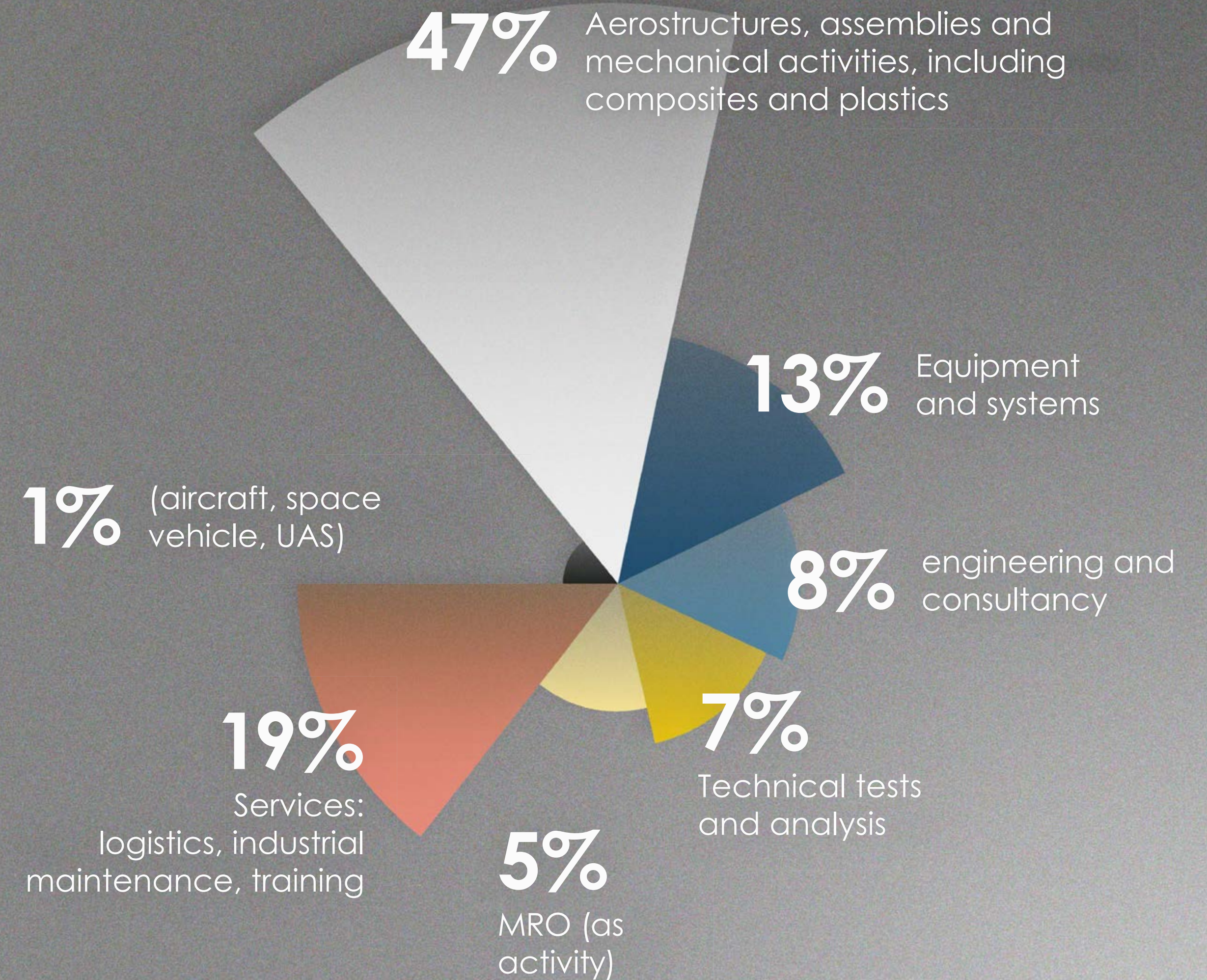


Defense: 44%    Civil: 56%





# Turnover by activity

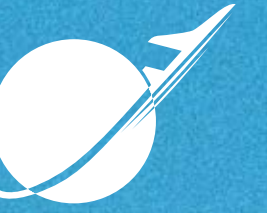


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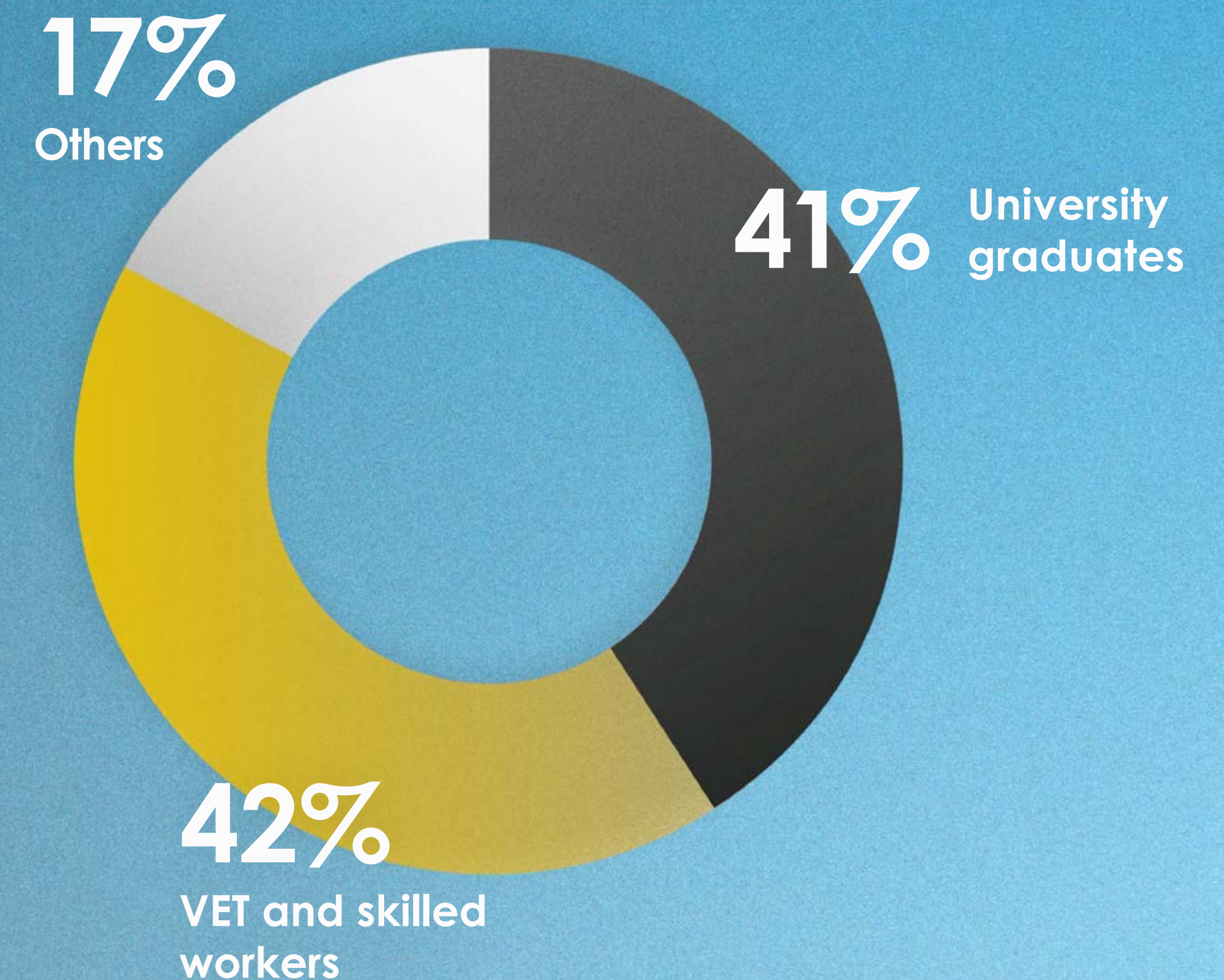
# Employment





# Employment and qualification

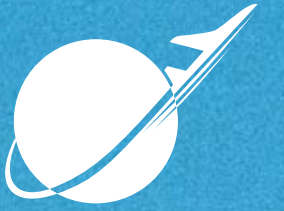
Total Employment: 13.136





# Global survey of the sector

# 4



# Exports

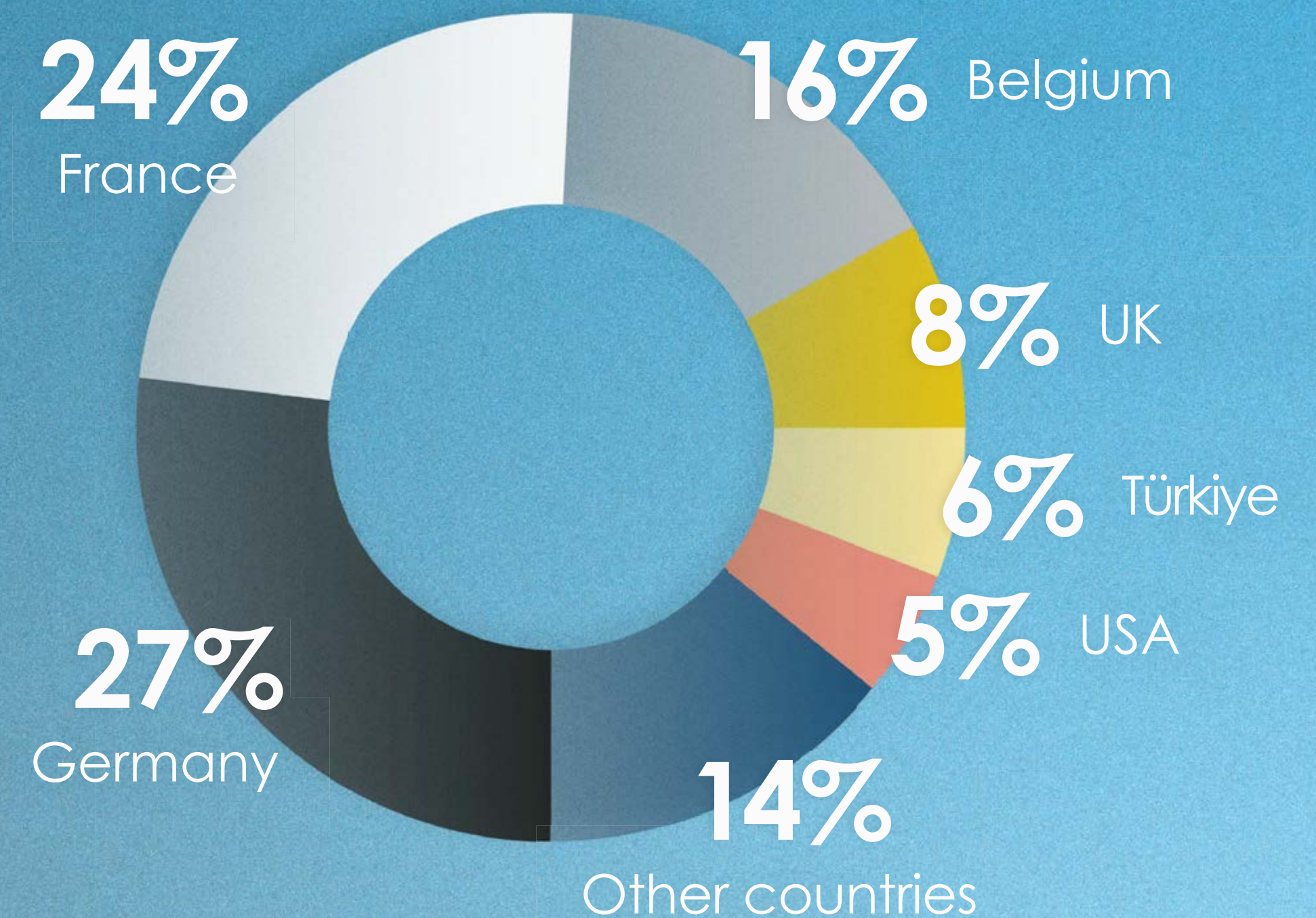
Andalusia is the **2nd exporting** region in Spain, with a growth of **39%** compared to the previous year.

There were 71 Andalusian exporting companies in 2022.

\*Source: Extenda - TRADE Andalusia

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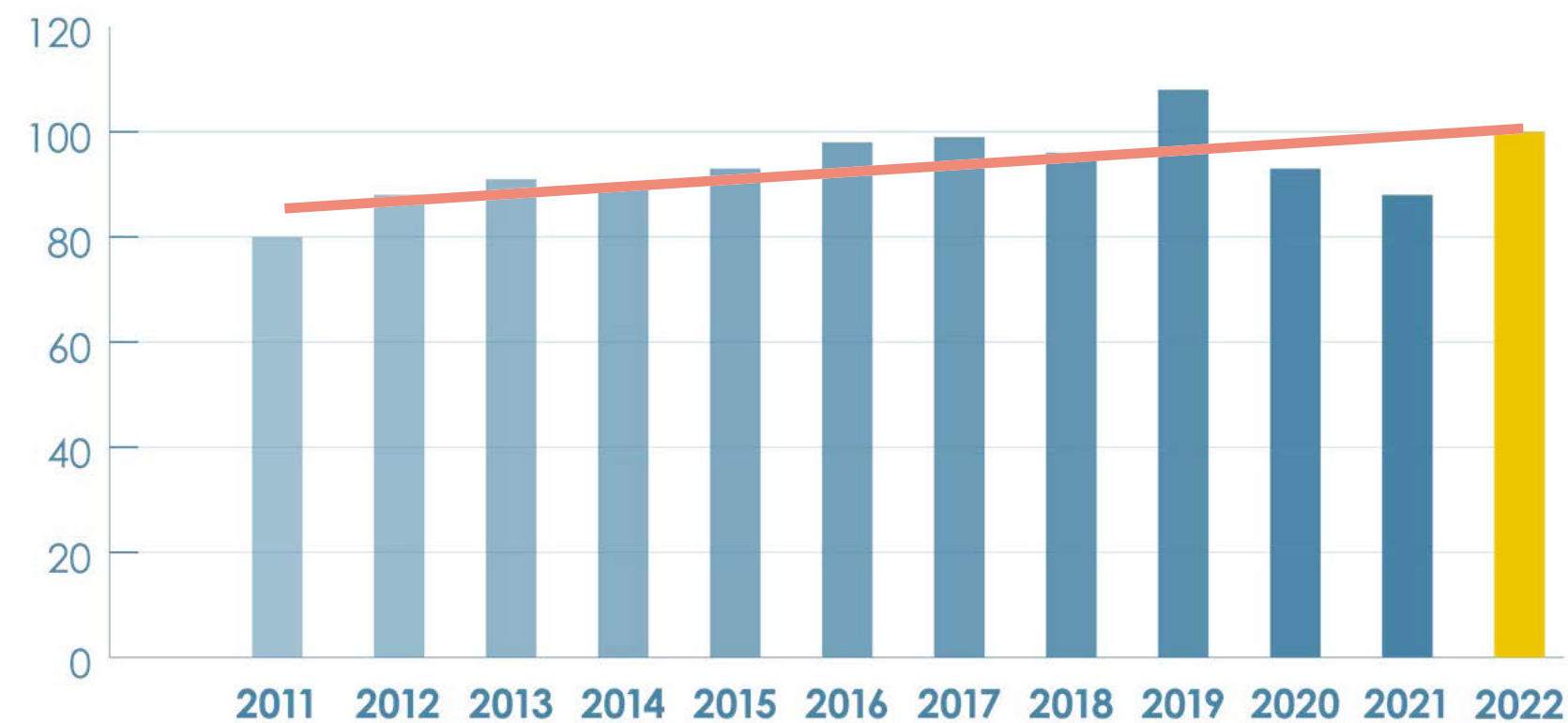
## Exports destination





# Productivity

Average productivity in 2022 grew by **13%** compared to 2021.

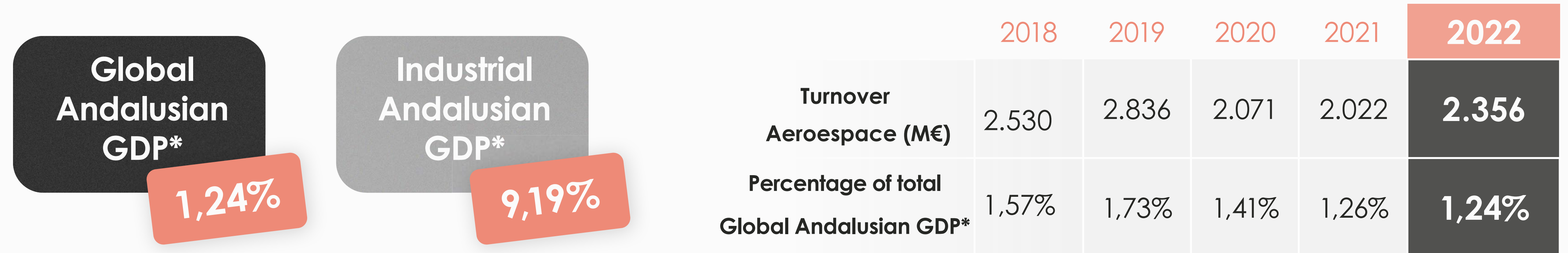


## Productivity evolution (thousands €/employee)

Year	Productivity
<b>2022</b>	<b>100</b>
2021	88
2020	93
2019	108
2018	96
2017	99
2016	98
2015	93
2014	90
2013	91
2012	88
2011	80



# Contribution to GDP



\*Source: Junta de Andalucía (Andalusian Regial Government)



**Juntos,**  
volamos más alto





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