

Report 2023

Andalusian Aerospace Sector



ANDALUCÍA
AEROSPACE
CLUSTER EMPRESARIAL



Junta de Andalucía
Consejería de Industria,
Energía y Minas



Introduction: Balance of 2023 in 10 news

1

Andalusian aerospace companies are continuing their recovery with increased workloads and, therefore, higher turnover and more employment.

2

The Andalusian aerospace sector is increasing its share in both industrial and global GDP.

3

The Spanish Space Agency begins its activity in Seville. Among the first initiatives are the ARTEMIS Accords and the renewal of collaboration with NASA.

4

Airbus Cadiz is born with the aim of becoming a strategic centre for commercial and military aircraft production. The new plant will be more complete and multi-purpose than the two existing ones, with a new 4,000m² building.

5

Airbus confirms that both Cadiz and Seville plants will develop and manufacture major components for the Eurodrone project.



Introduction: Balance of 2023 in 10 news

6

Airbus delivers first C295 to the Indian Air Force, as part of the contract signed for the manufacturing of 56 aircraft, 16 of which will be assembled in Seville. New A320 and A350 orders also secure workloads in civil aviation segment.

7

BAE Systems shows interest in investing in Andalusia and joins Andalucía Aerospace.

8

PLD Space successfully completes first launch of a private space rocket in Europe (MIURA) at the INTA (National Institute of Aerospace Technology) facilities in Arenosillo (Huelva).

9

FEINDEF was held with an important presence of companies from Andalusia and the Andalusian Government, where we had the opportunity to show the strength and capabilities of our defence industry.

10

The Spanish aerospace sector creates the Alliance for the Use of Green Hydrogen in Aviation by bringing together all main public and private companies in the aviation sector

Introduction: The Andalusian Aerospace Sector in 2024



1

The Swiss aeronautical company PILATUS has chosen the province of Seville for a major investment in a new components production plant for its PC-24 aircraft.

2

CEUS, the largest unmanned flight test centre in Europe, located on the INTA's El Arenosillo site in Huelva begins its activity.

3

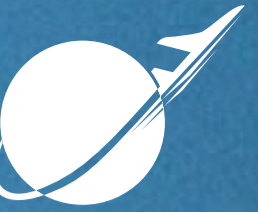
The ADVANCED MANUFACTURING CENTRE (CFA) begins its activity. Its management is awarded to the FIDAMC technology centre.

4

The NET ZERO project is launched to develop an Aerospace Hub in Jerez de la Frontera, Cadiz.

5

Resources and locations are earmarked to house the CUAM in Seville, the Center for Innovation in the Unmanned Aerial Vehicles and Urban Air Mobility.



Introduction: The Andalusian Aerospace Sector in 2024

6

Andalucía Aerospace cluster reaches the milestone of 100 member companies.

7

The ADM (Aerospace & Defense Meetings Sevilla) is held in Seville with record numbers of more than 1,300 participants from 29 countries.

8

The Spanish Space Agency, located in Seville, keeps on progressively completing its structure and appoints Juan Carlos Cortes as Managing Director.

9

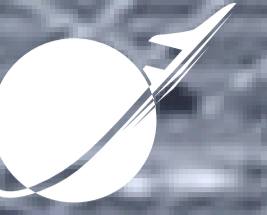
A substantial increase in commercial aircraft orders and production rate continues. Airbus announces to deliver 800 commercial aircraft by 2024.

10

Airbus C295 achieves 300 orders, consolidating its position as segment leader with 80% market share.

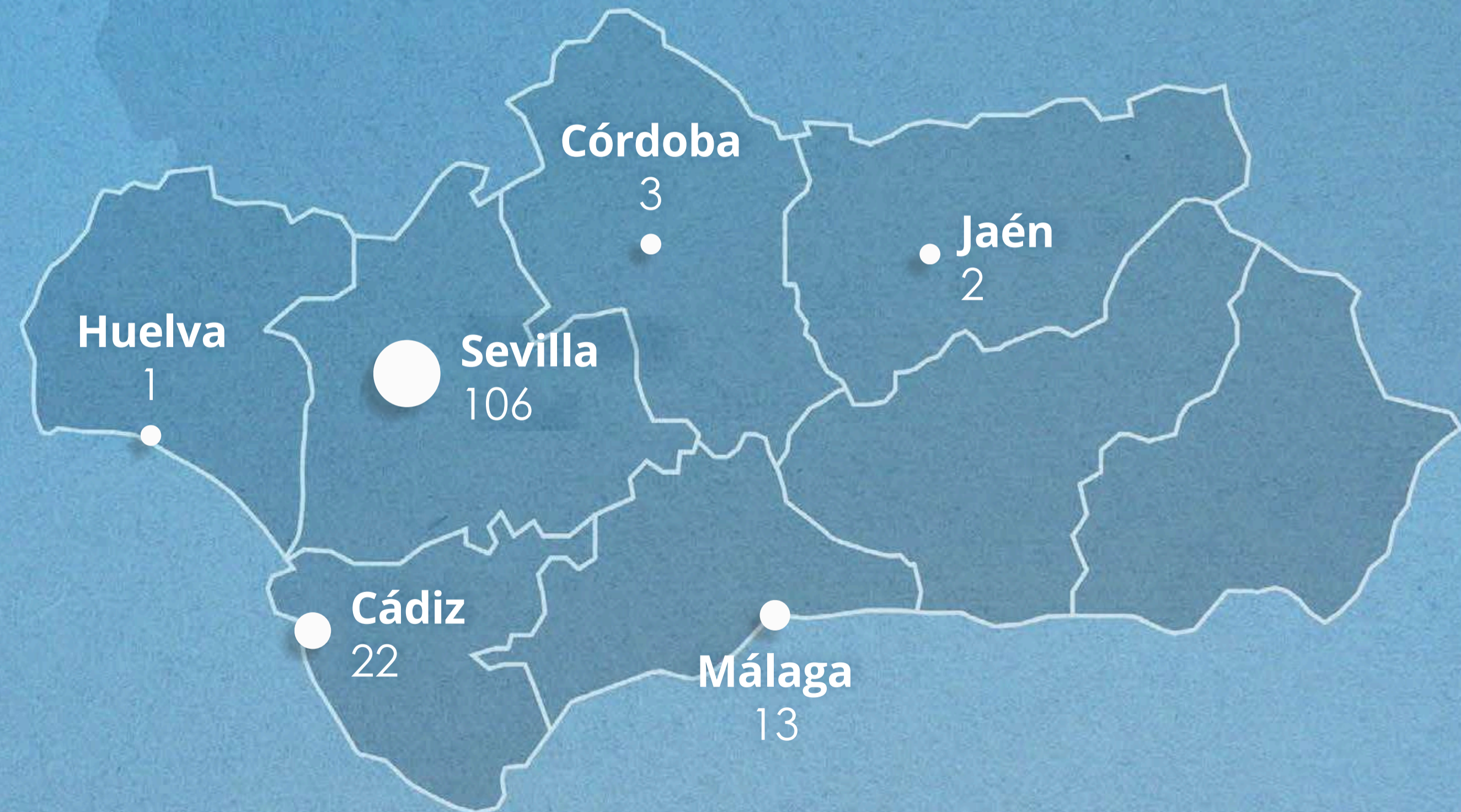
Sector Structure

01



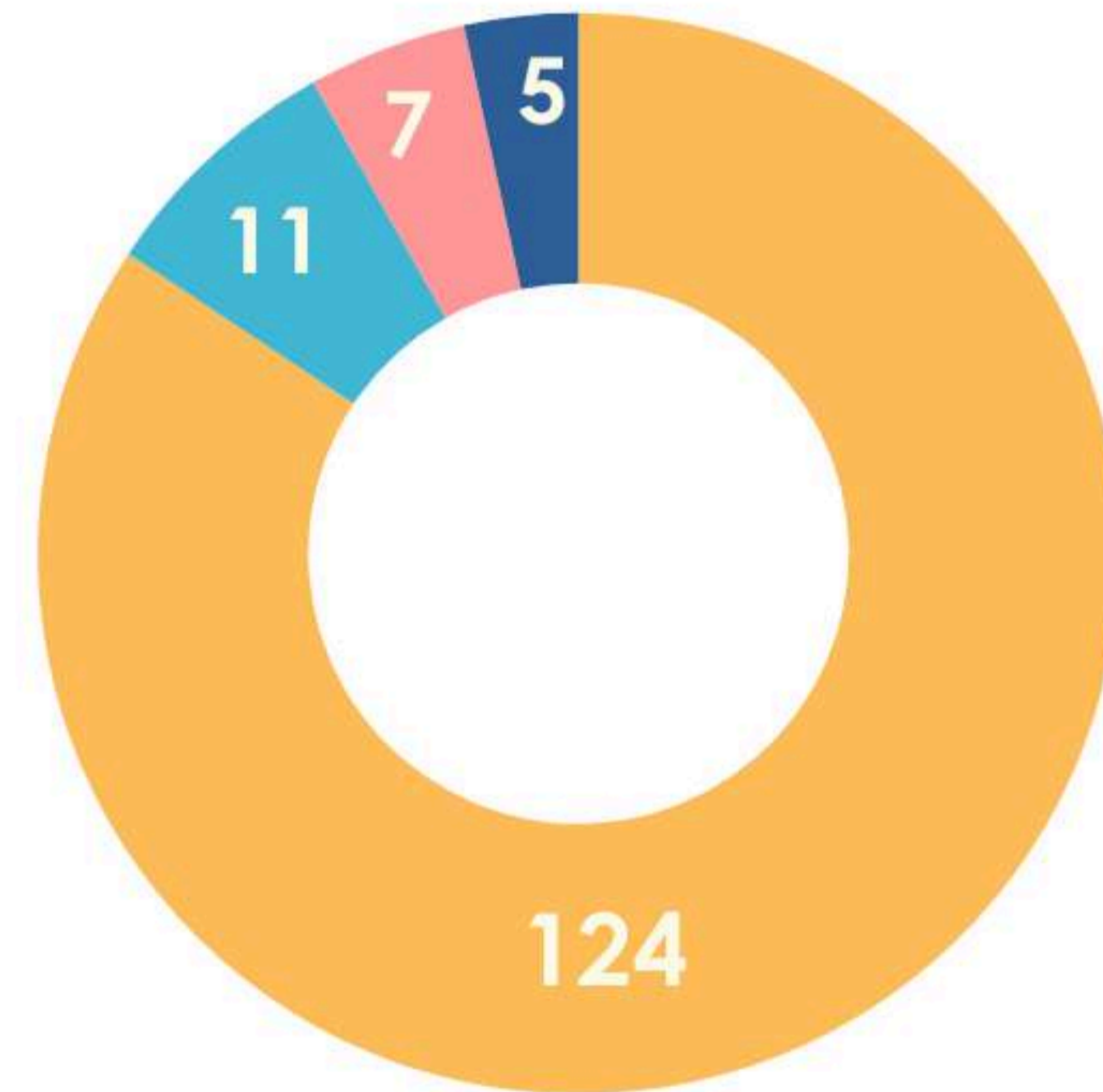


Distribution: 147 companies





Number of companies by main segment



Aeronautic Industry



Aviation and General Aviation



Space



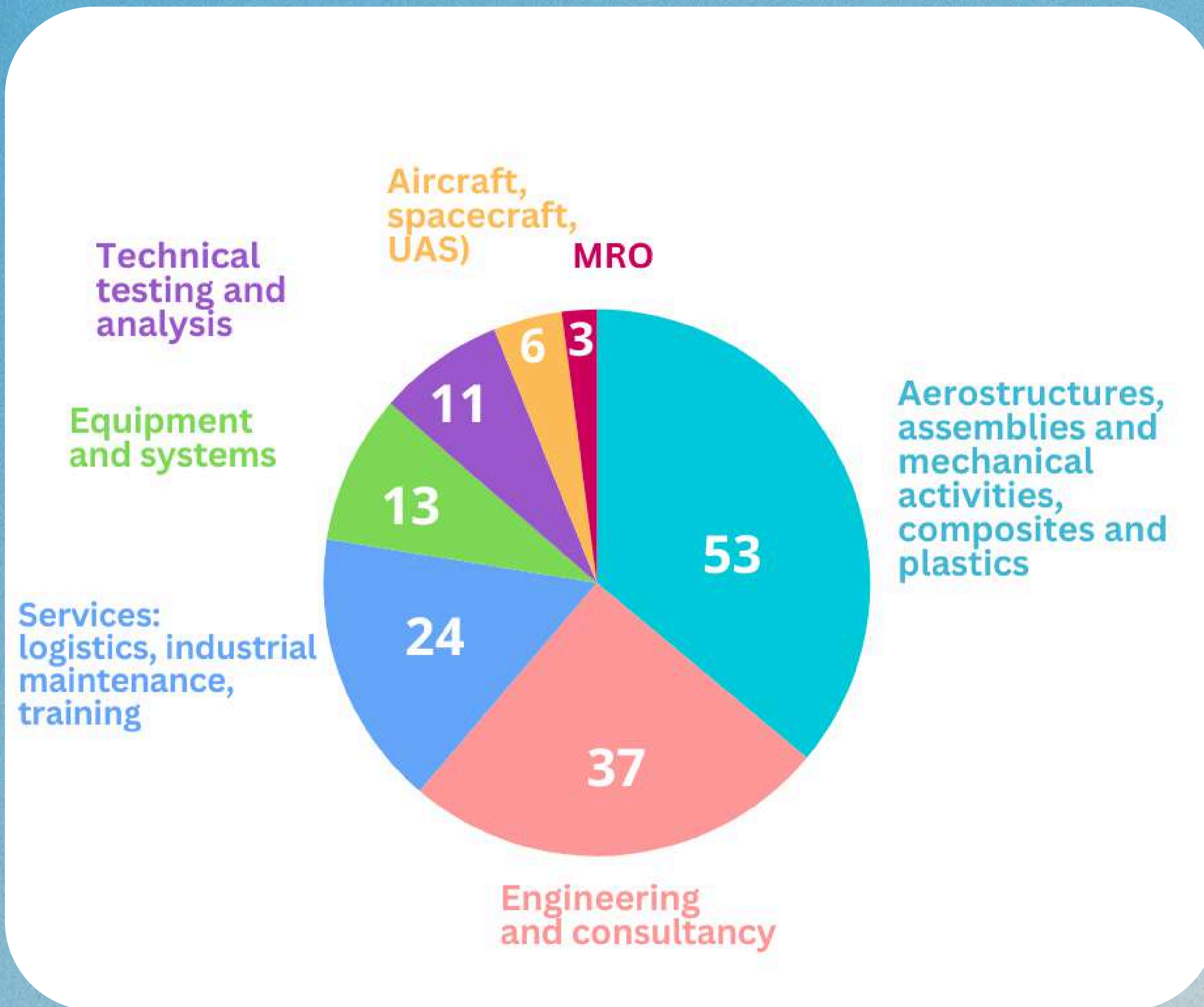
UAS and AAM

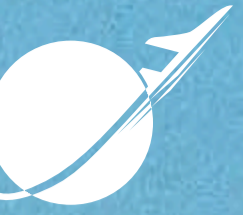




Number of companies by main activity

Aerostructures remain the main activity of the sector.

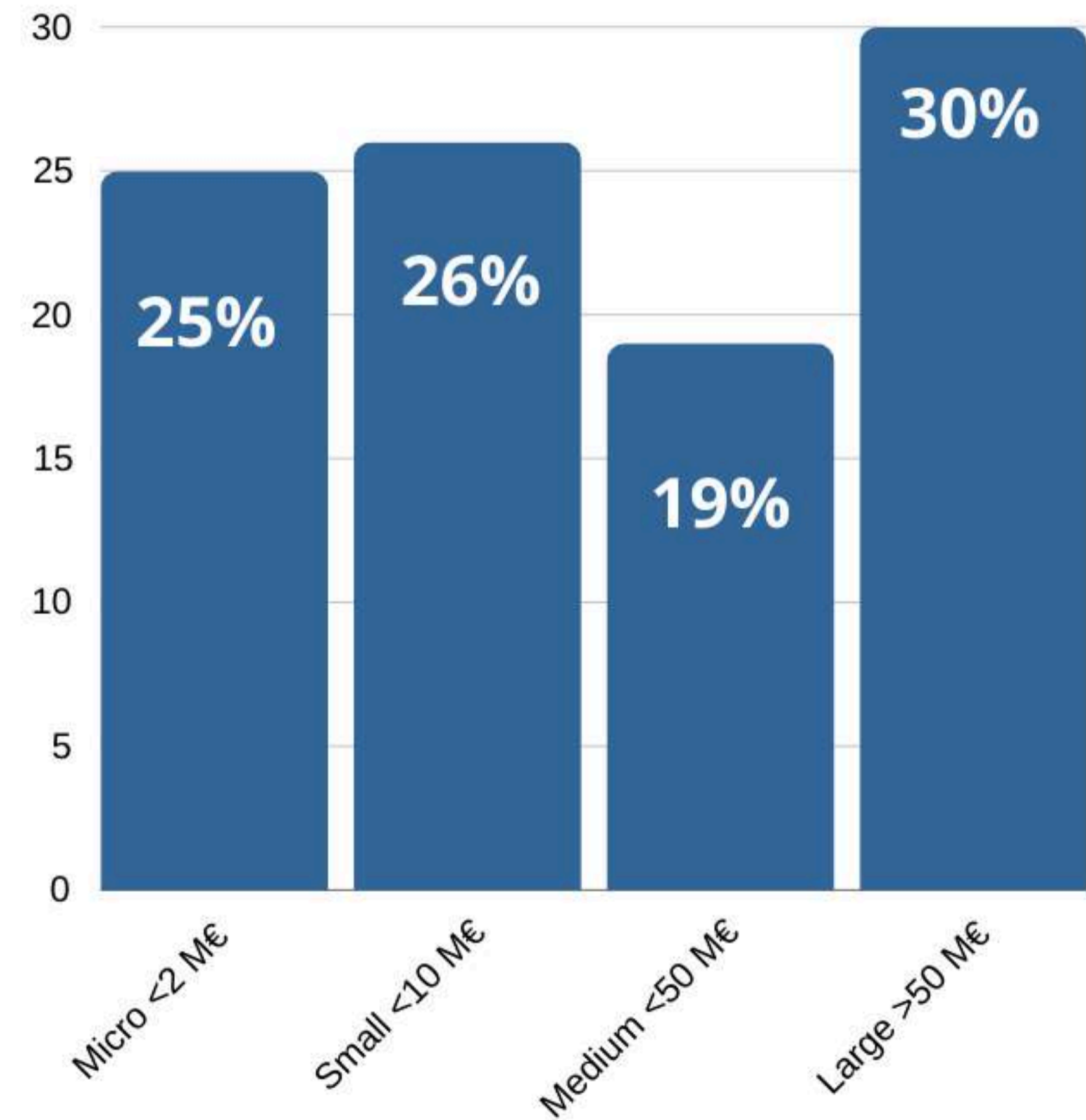




Report | 2023
Andalusian Aerospace Sector

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 employment and turnover

Turnover in 2023 grew by **16,4%** compared to 2022.

Employment in 2023 increased by **10%** compared to 2022.

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

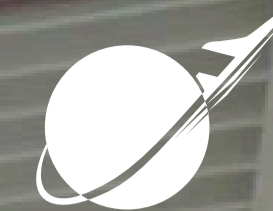
Any total or partial reproduction is prohibited without express reference to the Andalucía Aerospace Cluster, as the author of this report..

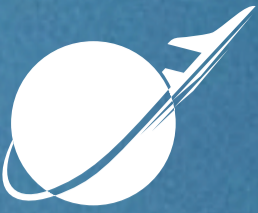
Evolution of turnover* (M€) and employment (No. of employees) in the Andalusian aerospace sector

YEAR	TURNOVER (M€)	EMPLOYMENT
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
2013	2.060	11.685

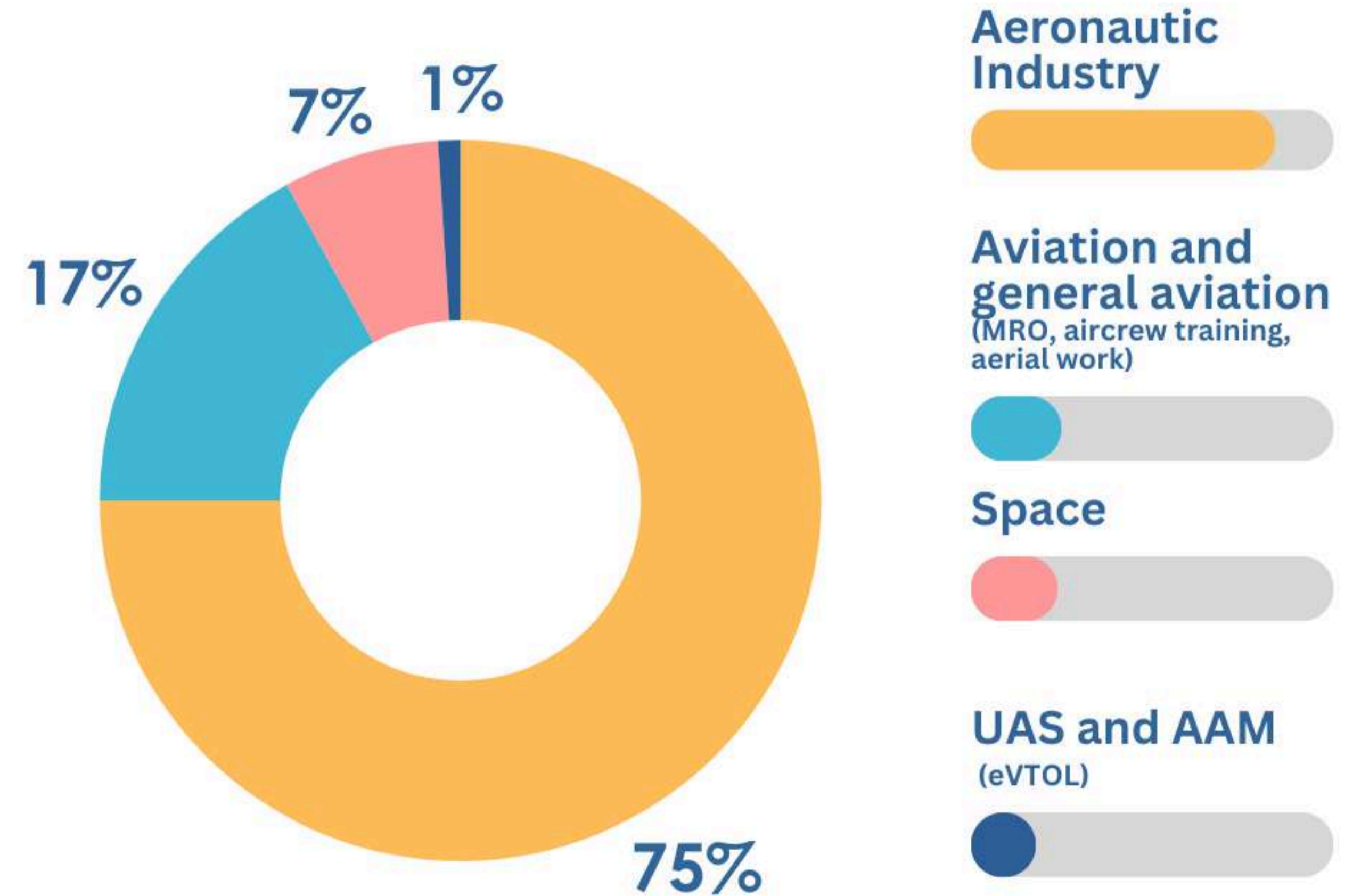
Sales

02





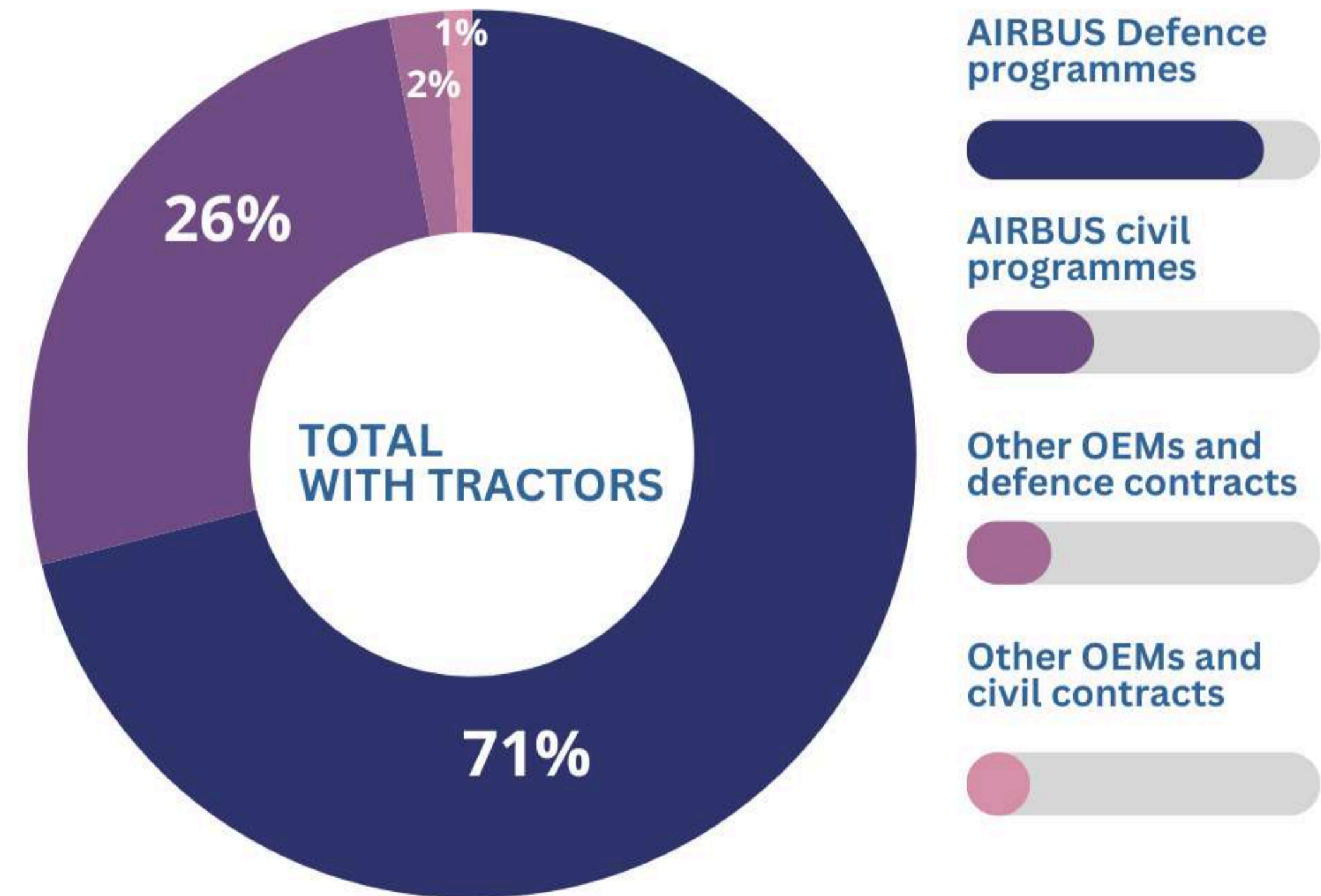
Turnover by market segment (without OEMs)





Turnover by programs of the aerospace industry (with OEMs)

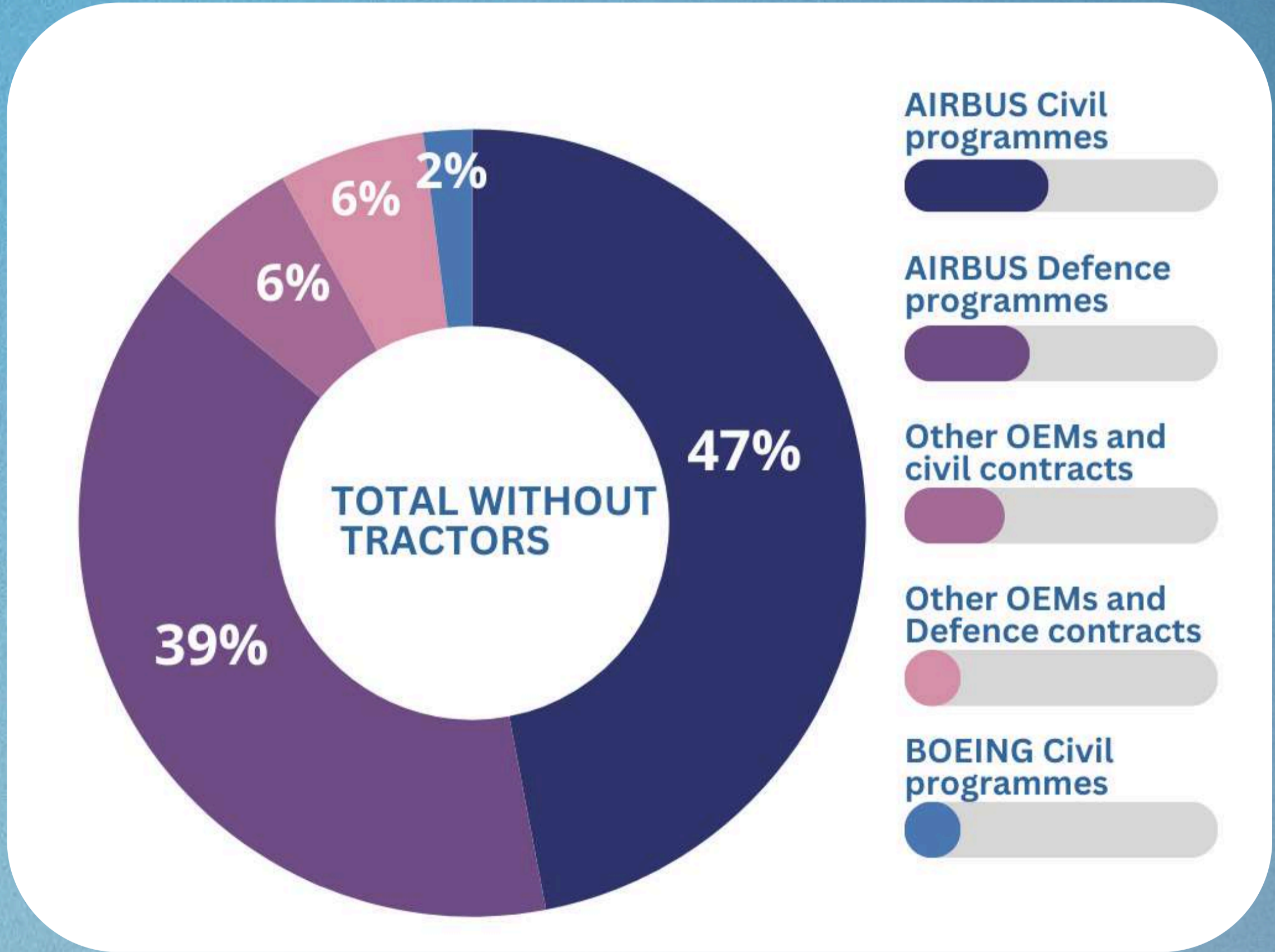
Defense 73% Civil 27%





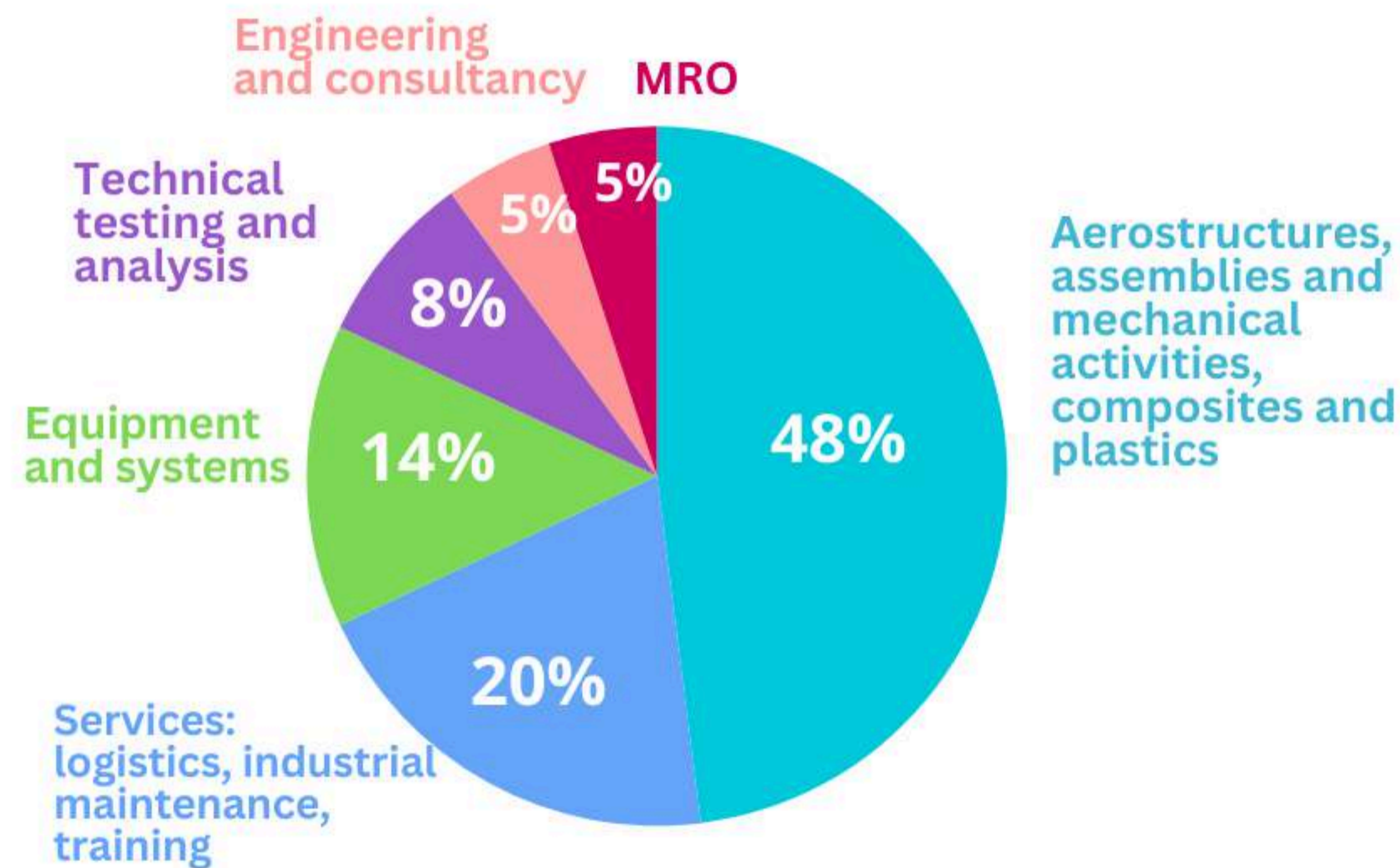
Turnover by programs of the aerospace industry (without OEMs)

Defense 45% Civil 55%





Turnover by activity (without OEMs)



Employment and Innovation

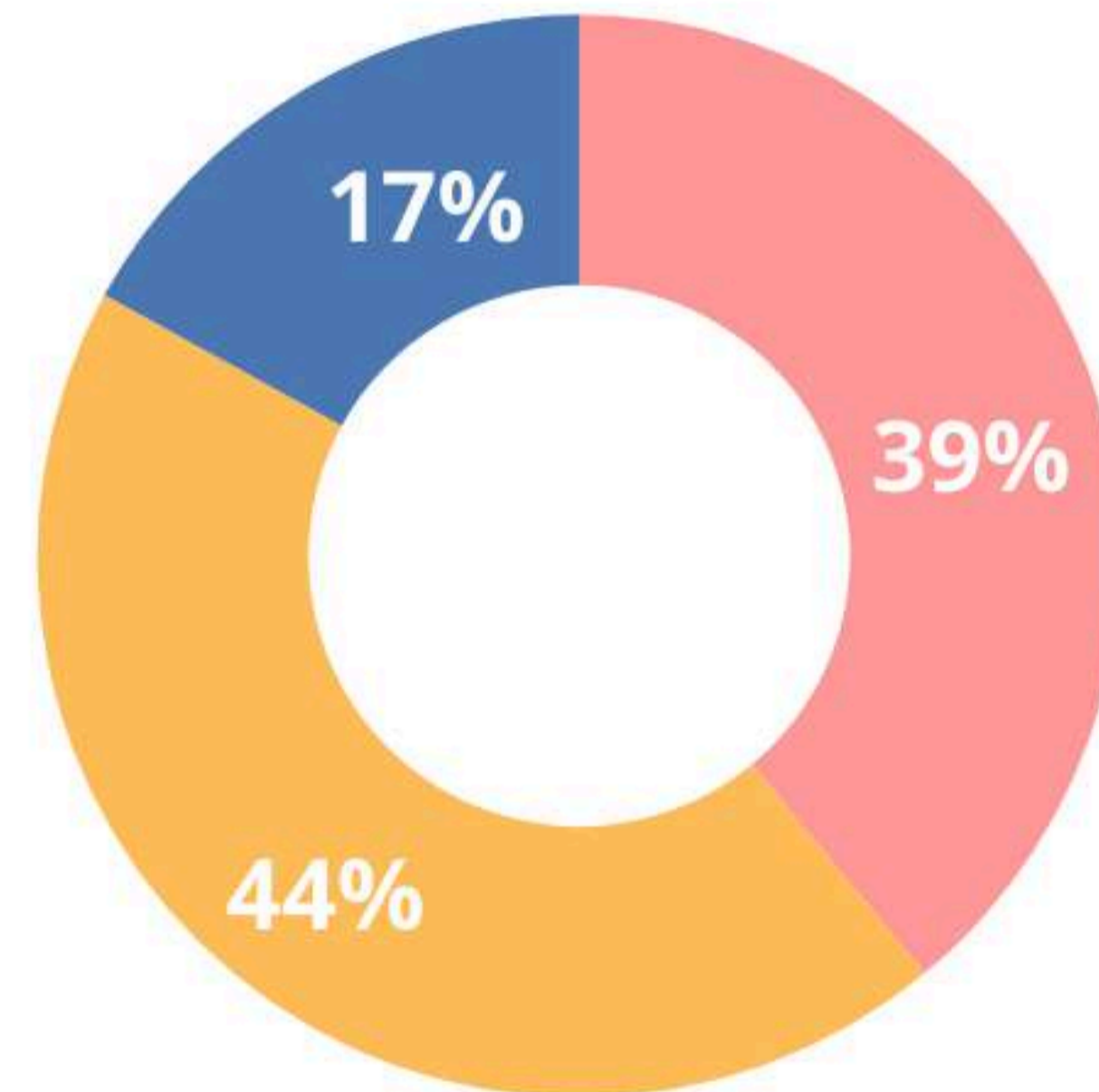
OSB





Employment and qualification

Total employment: 14.440
Women's employment: 23%



VET and skilled
workers



University
Graduates



Others





Innovation

**R&D Investment in
Andalusia
8,4%**



**R&D Investment in
Spain
9,4%***



Source: TEDAE 2022

Exports and productivity

04



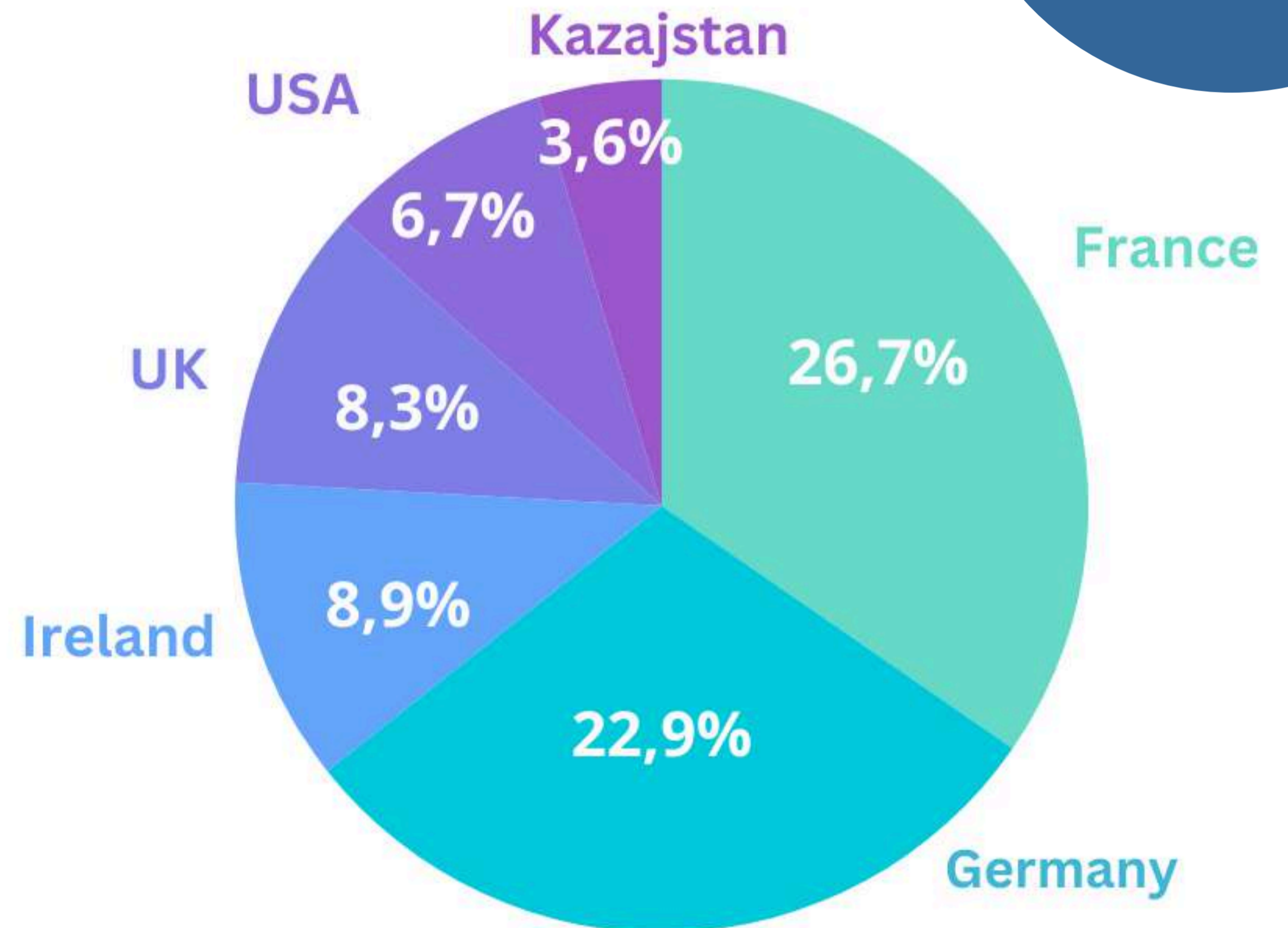


Exports

Andalusia represents **28,6%** of Spanish aerospace exports*.

Andalusia, 2nd
exporting region in
Spain

Exports destinations

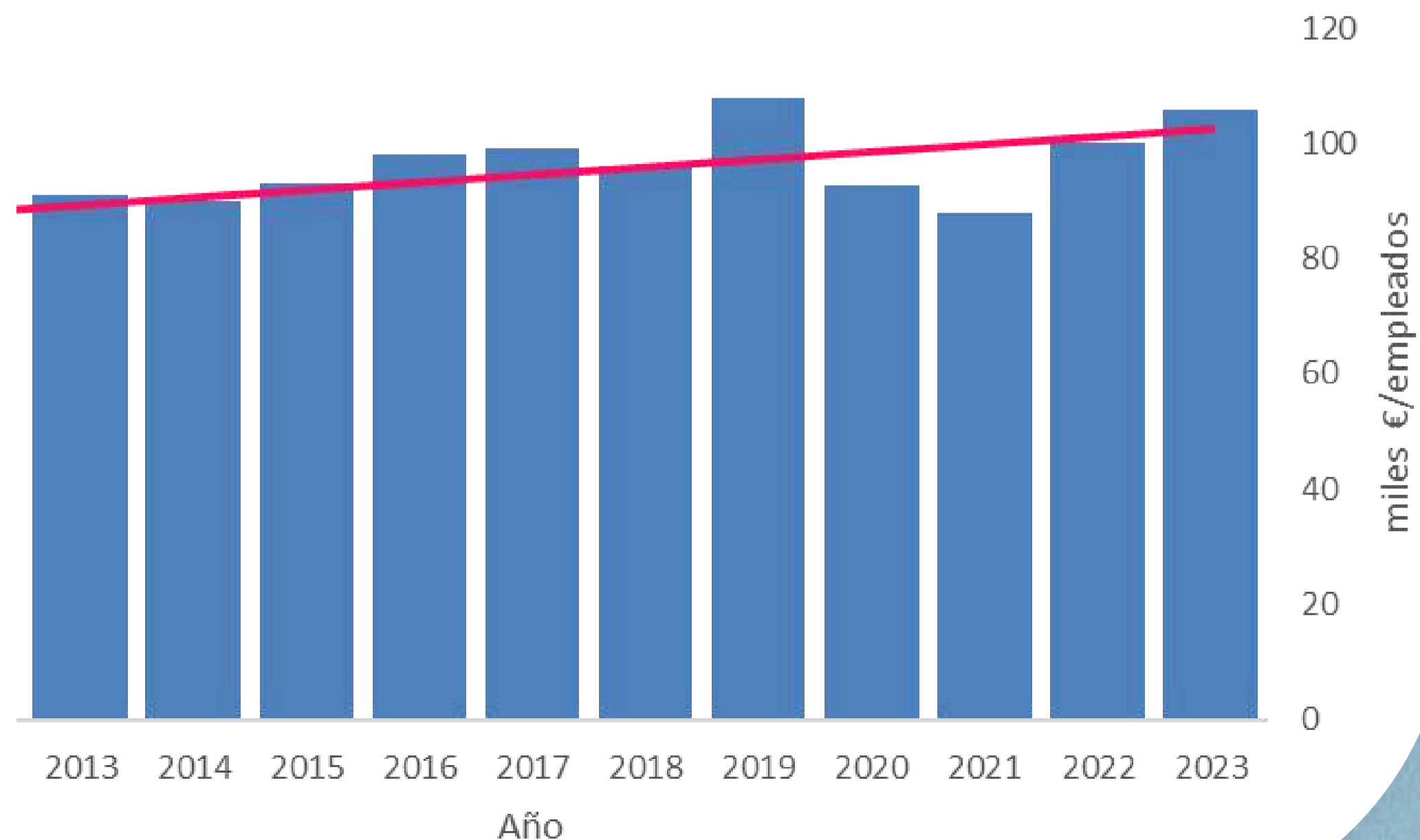




Report | 2023
Andalusian Aerospace Sector

Productivity

Average **productivity** in 2023 grew by **6%** compared to 2022



Productivity Evolution (turnover thousand €/employee)

YEAR	PRODUCTIVITY
2023	106
2022	100
2021	88
2020	93
2019	108
2018	96
2017	99
2016	98
2015	93
2014	90
2013	91



Contribution to GDP

Global Andalusian GDP

1,34%

Industrial Andalusian GDP

12,84 %

Aerospace Turnover(M€)

Percentage of total Global Andalusian GDP*

Percentage of total Industrial Andalusian GDP*

	2019	2020	2021	2022	2023
Aerospace Turnover(M€)	2.836	2.071	2.022	2.356	2.743
Percentage of total Global Andalusian GDP*	1,73%	1,41%	1,26%	1,24%	1,34%
Percentage of total Industrial Andalusian GDP*				10,90%	12,84%

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

#TogetherWeFlyHigher



**ANDALUCÍA
AEROSPACE**
CLUSTER EMPRESARIAL



Junta de Andalucía
Consejería de Industria,
Energía y Minas