

# Andalusian Aerospace Sector 2024 report





# 10 aerospace milestones in 2024

**01**

**PILATUS in Seville:** the Swiss company PILATUS to chose Seville for a new production plant for components for its PC-24 aircraft.

**02**

**CEUS test centre:** Europe's largest unmanned flight test centre was launched in El Arenosillo, Huelva.

**03**

**Advanced Manufacturing Centre (CFA):** its management was awarded to the FIDAMC technology centre.

**04**

**Aerospace hub in Jerez:** the NET ZERO Project was launched to develop an aerospace hub in Jerez de la Frontera.

**05**

**Opening of the Javier Imbroda Integrated Aerospace Vocational Training Centre in La Rinconada,** with an investment of 14 million euros.



# 10 aerospace milestones in 2024

**06**

**C295 for India:**  
Airbus delivered the first C295 to the Indian Air Force, of the 16 aircraft assembled in Seville.

**07**

**New Airbus orders:**  
workloads secured with new A320 and A350 orders.

**08**

**Increase in exports:**  
Andalusian aeronautical exports grew by 34%, reaching 89 countries, with a notable growth in Asia and America.

**09**

**ADM in Seville:**  
ADM (Aerospace and Defense Meetings) was held in Seville with more than 1,300 participants from 29 countries.

**10**

**Andalucía Aerospace's growth:** the cluster reached 100 member companies



# Keys to the aerospace sector in Andalusia in 2025



01.

The Spanish Space Agency, based in Seville, is preparing **the National Space Strategy**.

02.

**Airbus commercial** plans to deliver 820 commercial aircraft by 2025

03.

**New programmes:** the SIRTAP unmanned aerial surveillance and reconnaissance vehicle first flight is planned at CEUS (Huelva).

04.

**Further positioning of the Andalusian space industry in new space:** launching of the Andalusian satellite system and ESA BIC Andalusia in Seville

05.

Andalucía Aerospace and TRADE celebrate the **first Andalucía AERODAY** to highlight the potential of the Andalusian aerospace and promote synergies, with an important international sector presence.



# Keys to the aerospace sector in Andalusia in 2025



06.

Positioning of Andalusian industry to tackle **major defence programmes** in accordance with the announcement of the increase in the General State Budget

07.

Managing the **new geopolitical context** with the establishment of tariffs, which will impact on the price of raw materials and finished products.

08.

Capturing and **training talent**, a priority for the sector: development of a unique Andalusian aerospace training plan.

09.

Keep on progressing in the **decarbonization process** of the sector: fulfilment of obligations on the use of SAF, signing of MoC with Clean Aviation.

10.

Industry efforts in **digital transformation**, increasing **cybersecurity**, and **AI**



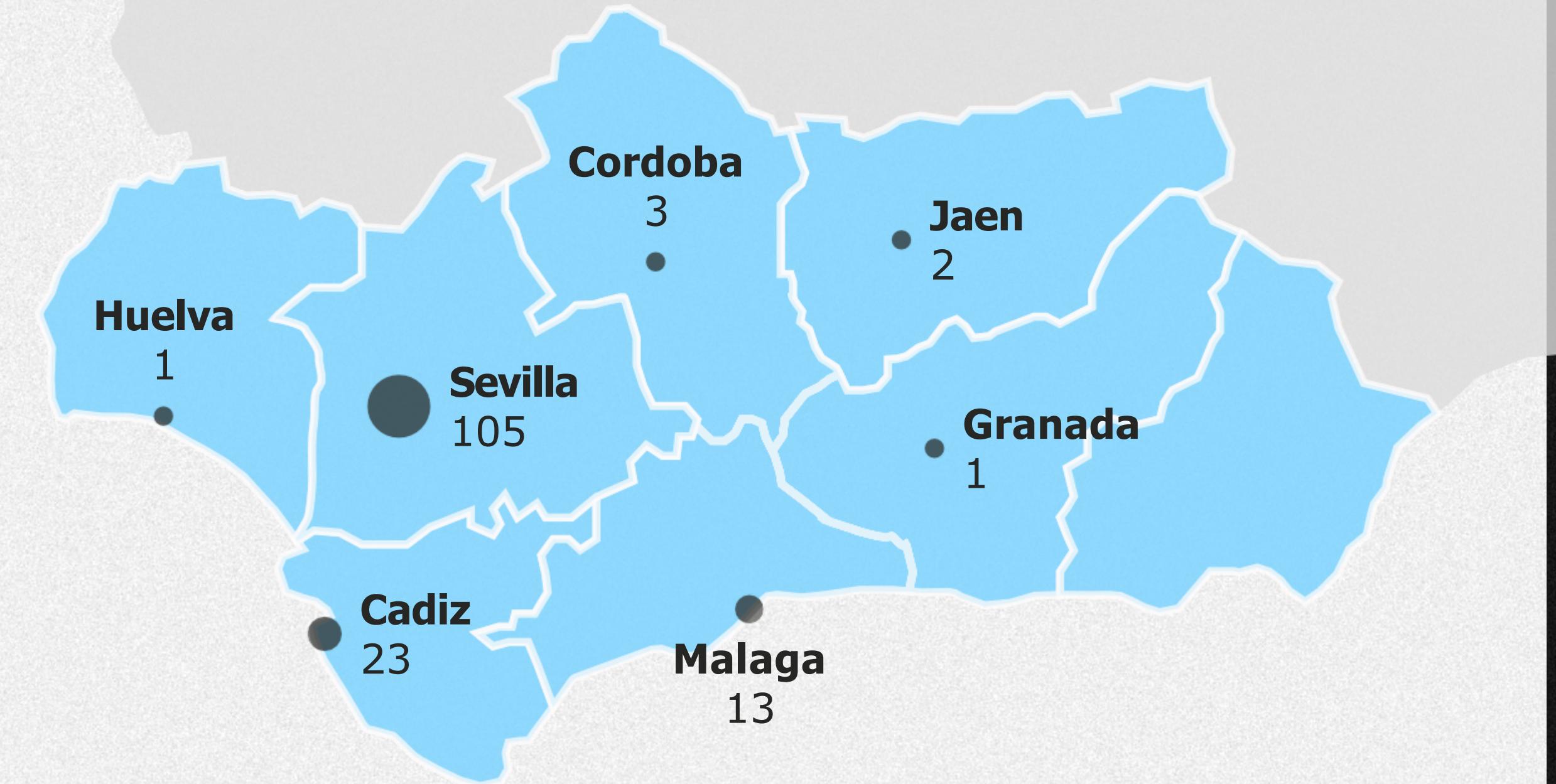
# 01. Sector structure





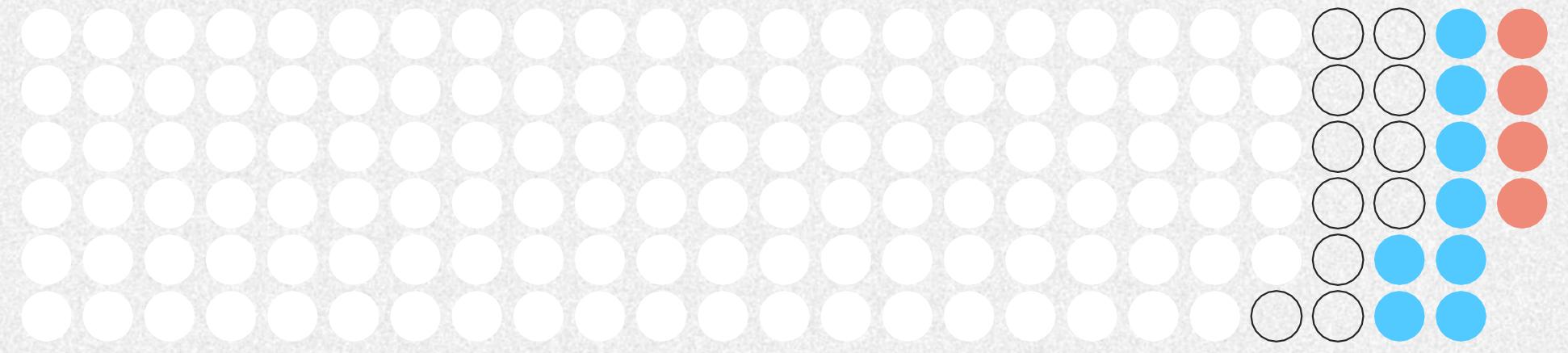
# Distribution

## 148 companies





# Number of companies by main segment

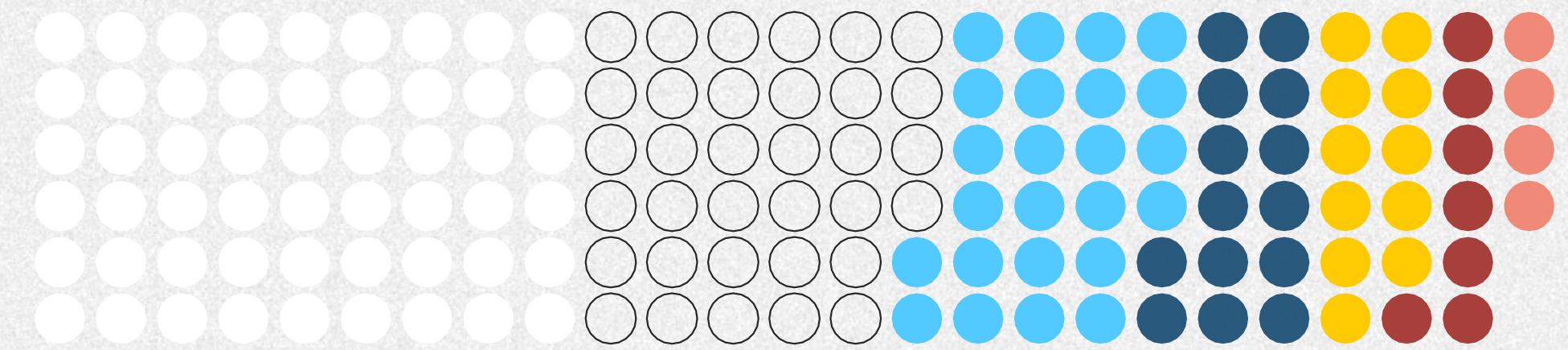


- **125** Aeronautic Industry
- **11** Aviation and General Aviation (MRO, aircrew training, aerial work)
- **8** Space
- **4** UAS and Advanced Air Mobility (eVTOL)



# Number of companies by main activity

Aerostructures remain the main activity of the sector .



●	<b>54</b>	Aerostructures, assemblies and mechanical activities, composites and plastics
○	<b>34</b>	Engineering and consultancy
●	<b>24</b>	Services: logistics, industrial maintenance, training
●	<b>14</b>	Equipment & Systems
●	<b>11</b>	Technical testing and analysis
●	<b>7</b>	Integrator (aircraft, spacecraft, UAS)
●	<b>4</b>	MRO



# Company Size in the sector

**24%** Micro

Turnover < **2M€** | Employment: < **10**

**27%** Small

Turnover < **10M€** | Employment: < **50**

**19%** Medium

Turnover < **50M€** | Employment: < **250**

**30%** Large

Turnover > **50M€** | Employment: > **250**



# Evolution of employment and turnover

Turnover in 2024 grew **6,84 %** compared to 2023.

Employment in 2024 grew **7,31 %** compared to 2023.

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

Year	Turnover (M€)	Employment
<b>2024</b>	<b>2,914</b>	<b>15,496</b>
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

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

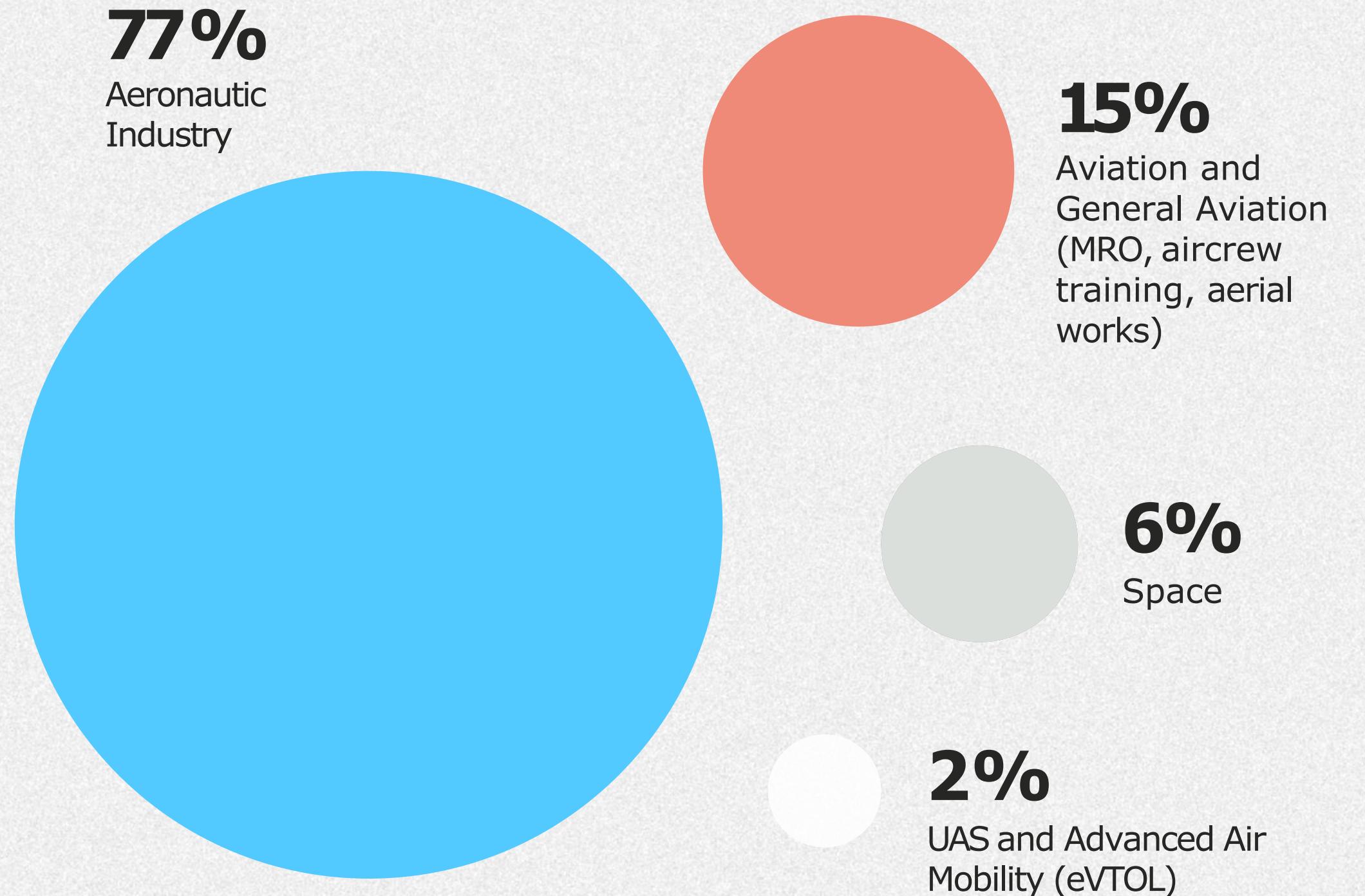


## 02. Sales



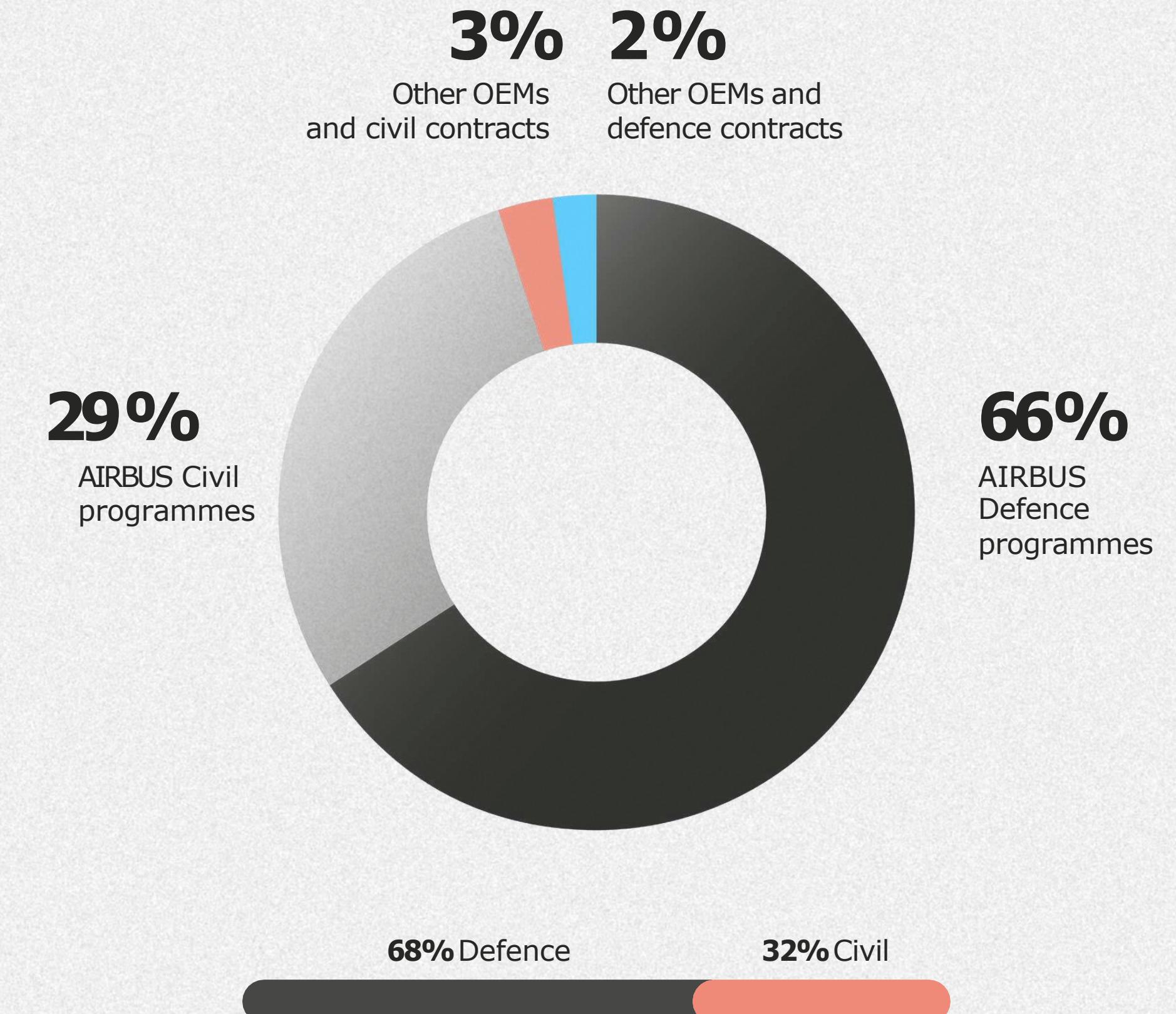


# Turnover by market segment (without OEMs)



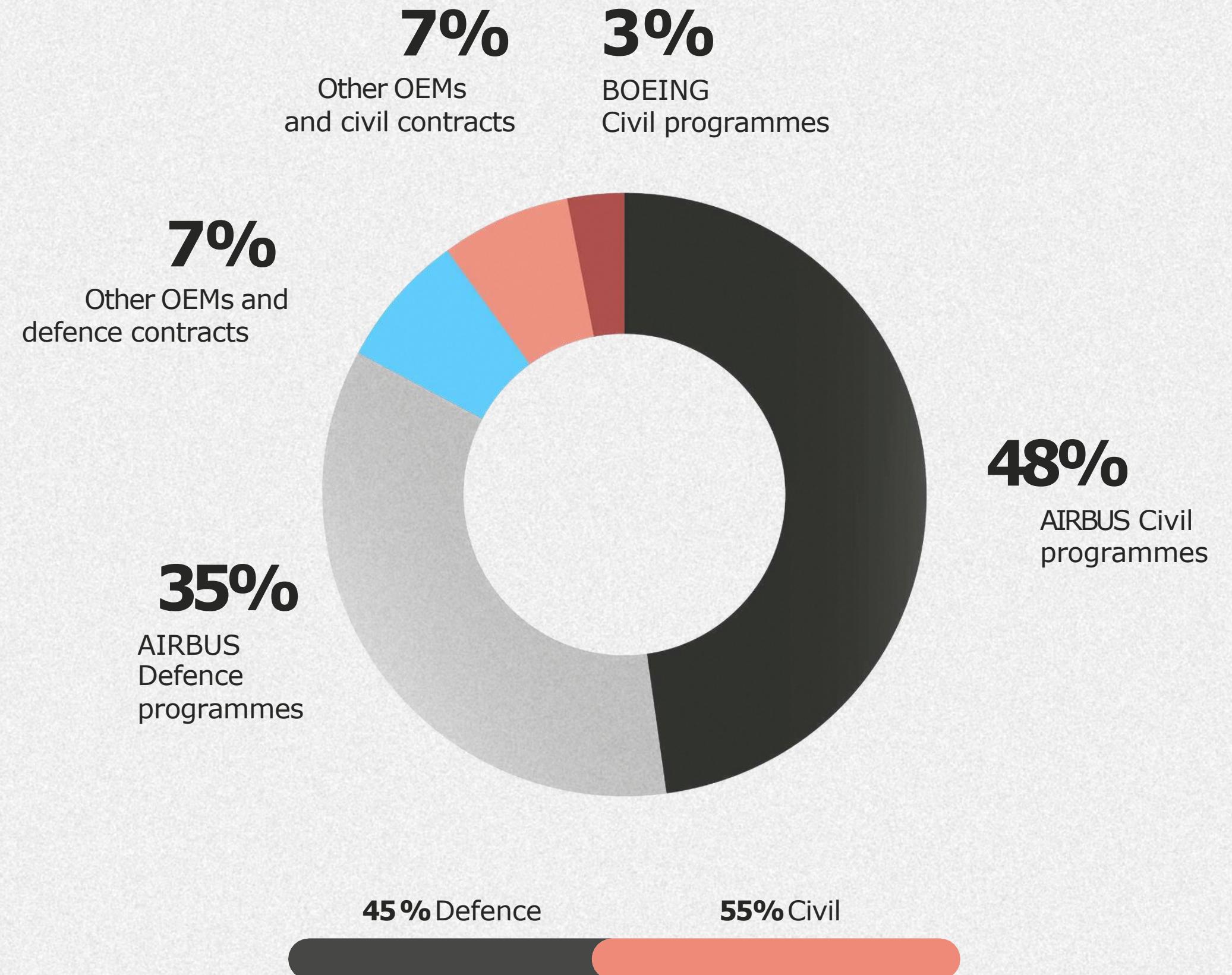


# Turnover by programmes of the aerospace industry (with OEMs)





# Turnover by programmes of the aerospace industry (without OEMs)





# Turnover by activity (without OEMs)

Integrator (aircraft,  
spacecraft, UAS)

**2%**

**5%**  
MRO

**6%**  
Engineering  
and consultancy

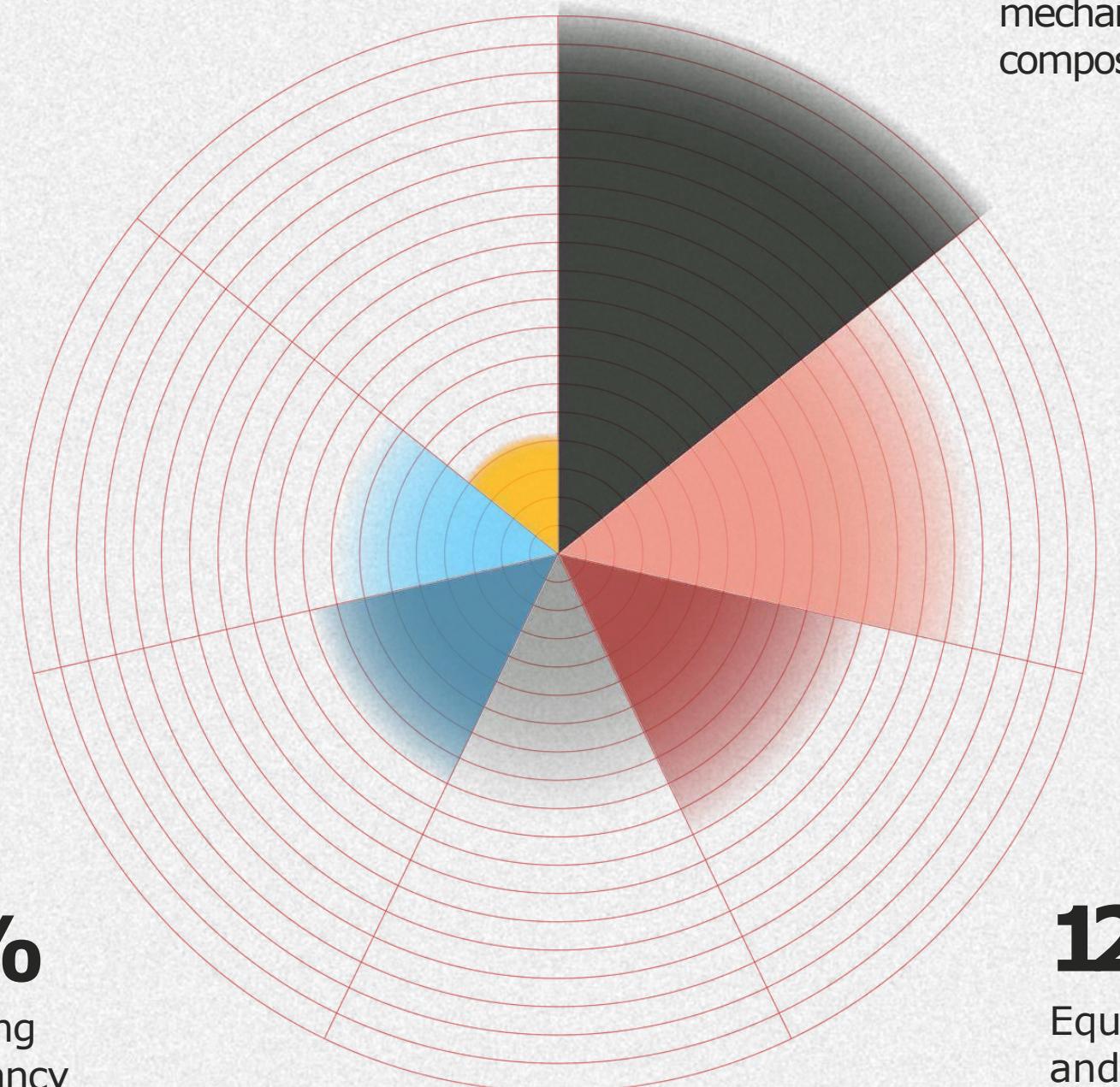
**6%** Technical testing  
and analysis

**50%**

Aerostructures,  
assemblies and  
mechanical activities,  
composites and plastics

**19%**  
Services:  
logistics,  
industrial  
maintenance,  
training

**12%**  
Equipment  
and systems





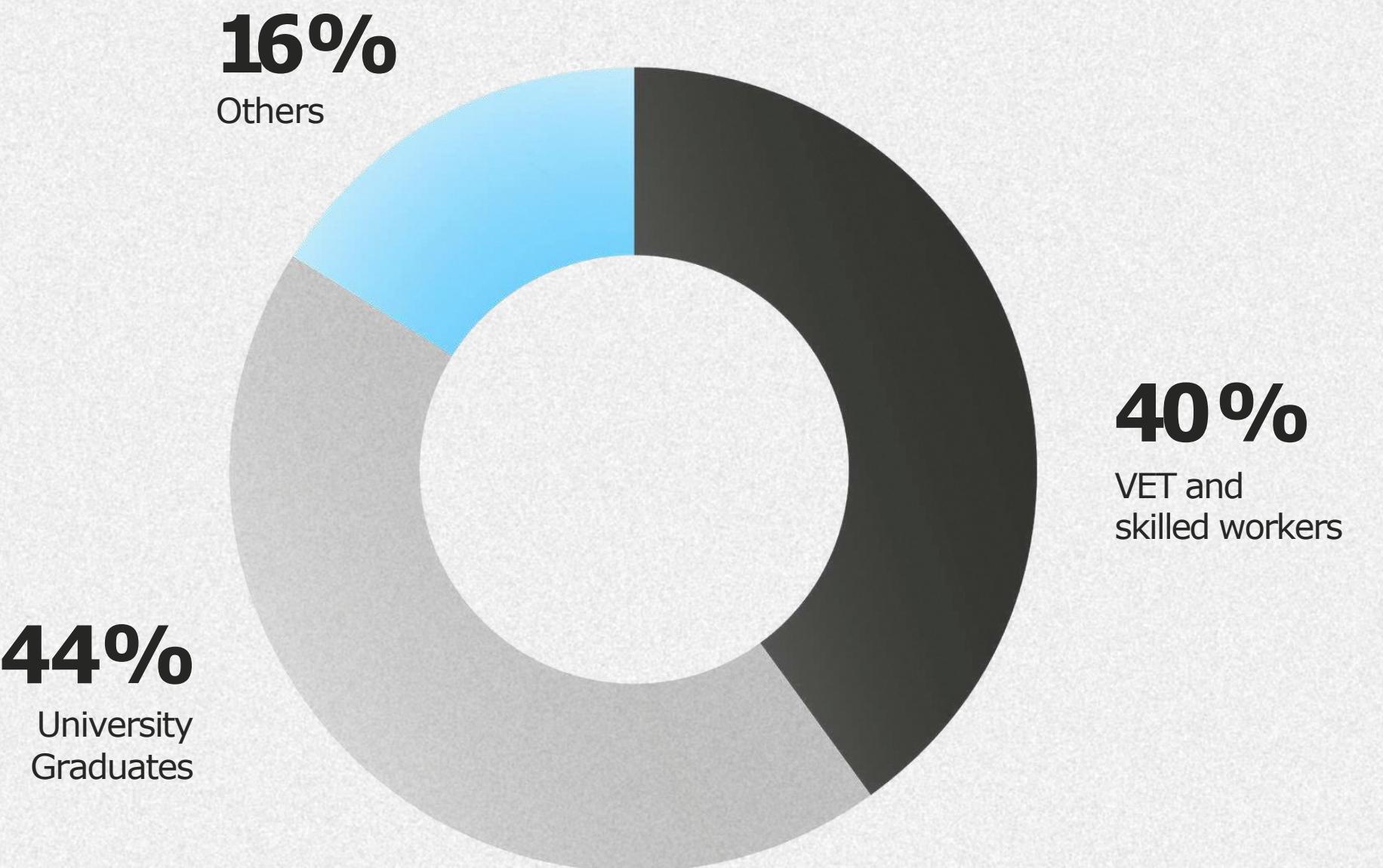
# 03. Employment and innovation



# Employment and qualification

Total employment: **15,496**

Female employment: **22%**





# Innovation

R&D Investment in Andalusia: **5,8%**





# 04. Exports and productivity

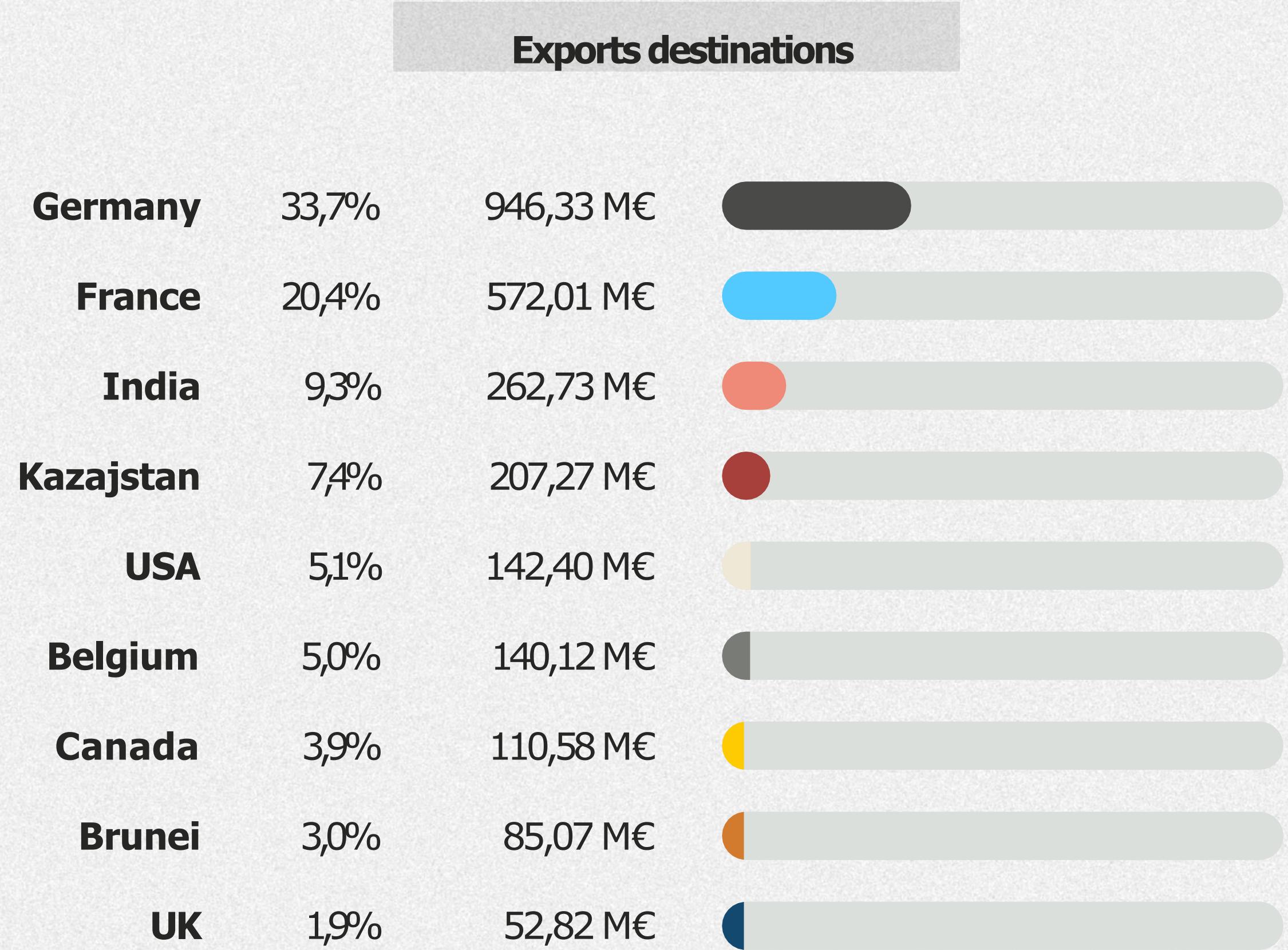




# Exports

Andalusia represents 29,8% of Spanish aerospace exports\*.

Andalusia, 2nd exporting region in Spain

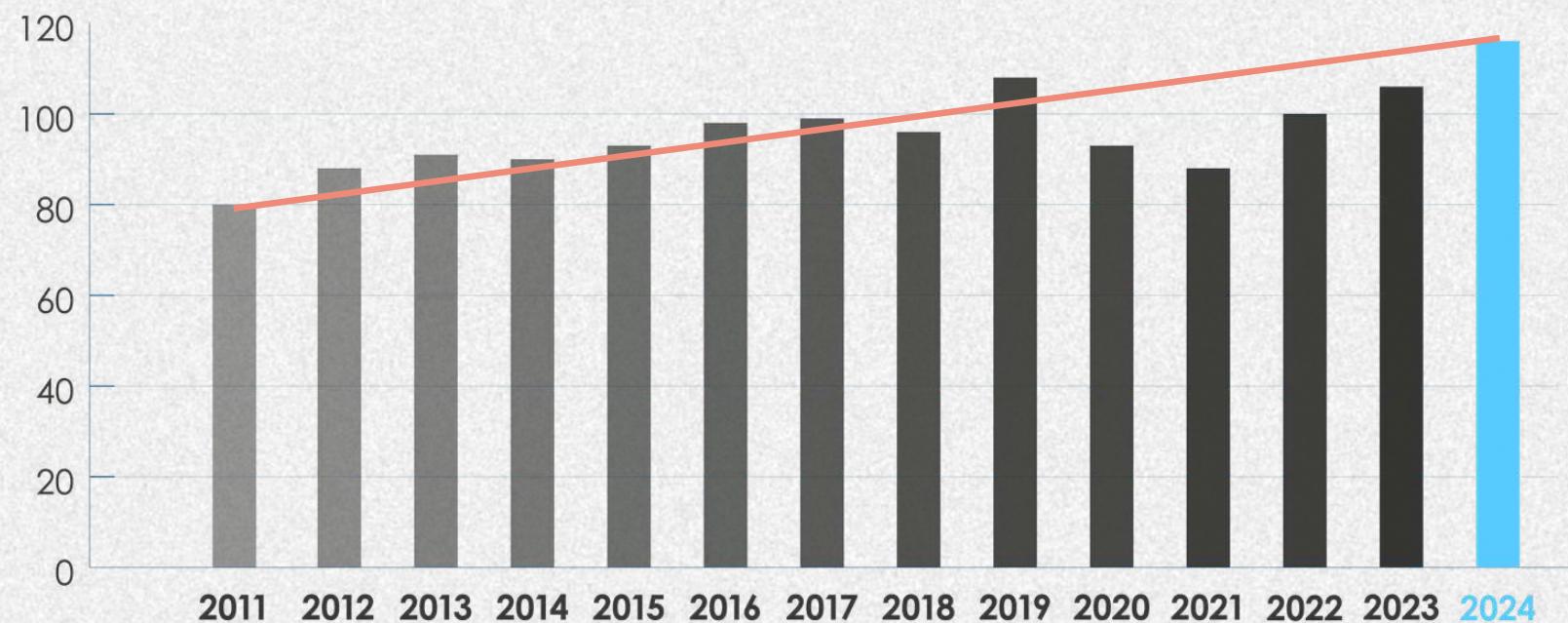


\*Source: Andalucía TRADE



# Productivity

Average productivity in 2024 grew by **5,6%** compared to 2023.



## Productivity Evolution

(turnover thousand €/employee)

Year	Productivity (thousand €)
2024	112
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

1,32%

Industrial Andalusian GDP

13,84%

	2020	2021	2022	2023	2024
Aerospace turnover (thousand €)	2.071	2.022	2.356	2.743	<b>2,914</b>
Percentage of total <b>global Andalusian GDP*</b>	1,41%	1,26%	1,24%	1,34%	<b>1,32%</b>
Percentage of total <b>industrial Andalusian GDP*</b>	-	-	10,90%	12,84%	<b>13,84%</b>

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



Together,  
We fly higher

