

FOR A SURE WIN **INVEST IN ANDALUCÍA**



AEROSPACE INDUSTRY



EUROPEAN UNION
European Structural and Investment Fund



Agency of Innovation and Development of Andalucía IDEA
ANDALUSIAN MINISTRY OF ECONOMY, KNOWLEDGE, ENTERPRISES AND UNIVERSITY

Invest in Andalucía, an initiative supported by the Regional Government, aids foreign companies to establish and expand their business in the region, offering a wide range portfolio of tailor-made services for companies throughout all project phases.

OUR SERVICES



INVESTMENT PLANNING

- ⦿ Accurate information on sectorial regulation, situation of the industry and market.
- ⦿ Search for the best location for each project.
- ⦿ Scheduling personalised visits to locations and meetings with institutions, companies, universities and potential partners.
- ⦿ Information on business opportunities: acquisition of companies and investment opportunities.
- ⦿ Information about grants and financing sources available and applicable to the project.



IMPLEMENTATION AND SOFT-LANDING SERVICES

- ⦿ Information on available workforce, employment and operational costs, intellectual property, taxation and procedures for applications for work and residence permits.
- ⦿ Assistance through national and regional institutions.
- ⦿ Information and follow-up on permits and administrative procedures required to commence professional activities.
- ⦿ Information about potential local providers.



AFTERCARE

- ⦿ Personalised service for multinational established in Andalusia.
- ⦿ Project monitoring.
- ⦿ Elaboration of tailored proposals for parent companies.
- ⦿ Support on potential expansion plans in the region.

Andalusia is a region in Spain integrated into the European Union. Its location, strong economy, population size and infrastructure provide with competitive advantages for investment and entrepreneurial growth.

ANDALUSIA'S ADVANTAGES



LOGISTICAL HUB IN SOUTHERN EUROPE:

- ⦿ Strategic geographical location between Europe and Africa.
- ⦿ Bridge between the Atlantic and the Mediterranean.
- ⦿ Gateway portal between America and Asia.



COMPREHENSIVE AND EFFICIENT LOGISTICAL SYSTEM:

- ⦿ 5 international airports.
- ⦿ Broad high-speed rail network.
- ⦿ Extensive roadway network.
- ⦿ 10 commercial ports.
- ⦿ Algeciras, the main container port in the Mediterranean.
- ⦿ Seville, the only fluvial port in Spain.



NETWORK OF SPECIALIST TECHNOLOGICAL PARKS THAT BOOST R&D+I ACTIVITIES:

- ⦿ The greatest workforce offer in Spain.
- ⦿ Highly competitive employment costs.
- ⦿ Productivity rates above the average in the European Union.
- ⦿ Fiscal advantages for the establishment of new companies and exports in the Free Trade Areas of the South of Spain: Cadiz and Seville.
- ⦿ High-intensity in terms of subsidies, access to funding and other fiscal incentives for investment, expansion and innovation.
- ⦿ World-renowned quality of life.

2ND LARGEST
REGION IN
SPAIN:
87.597 KM²

A LARGE
MARKET:
500,000
COMPANIES

MOST
POPULATED
REGION IN SPAIN
8.4M
INHABITANTS

+ 1.400
FOREIGN
COMPANIES WITH
PRESENCE IN
THE REGION

GDP
€160M

ANDALUSIA, A COMPETITIVE REGION IN THE SOUTH OF SPAIN

The Andalusian aerospace sector boasts a long tradition spanning more than 100 years.

During this time, Andalusia has bolstered its position to become the second region in terms of aeronautical industry.

It is at the fore of the national ranking in aeronautical export figures.

It is one of the three main European poles with FAL, together with Toulouse and Hamburg.

The aeronautical industry accounts for 1.6% of Andalusia's GDP, 20% of the region's manufacturing GDP and almost 30% of the national aerospace revenues.

Major implantation in the Andalusian region of the main European OEM (Airbus) and the two national Tier 1 (Aciturri-Alestis and Aernnova).

High level of specialisation of Tiers 2 and 3 in the Seville – Cadiz axis.

Andalusian industry participates in the main international aeronautical programmes.

Andalusia is a key territory for the testing and development of Unmanned Aerial Vehicle Systems (UAVs) and Remotely Piloted Aircraft Systems (RPAs).

Additionally, Andalusia offers opportunities for pilot training academies and maintenance, repair and operations projects (MRO).

State-of-the-art infrastructure and high capacity for production, assembly and launch of satellites.



+130
COMPANIES



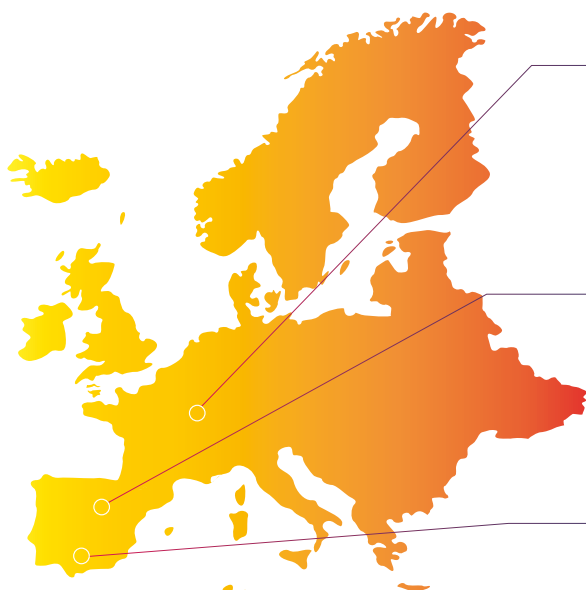
+15.000
DIRECT
EMPLOYMENT



64.000
INDIRECT
EMPLOYMENT



+ 2.600 M€
TURNOVER



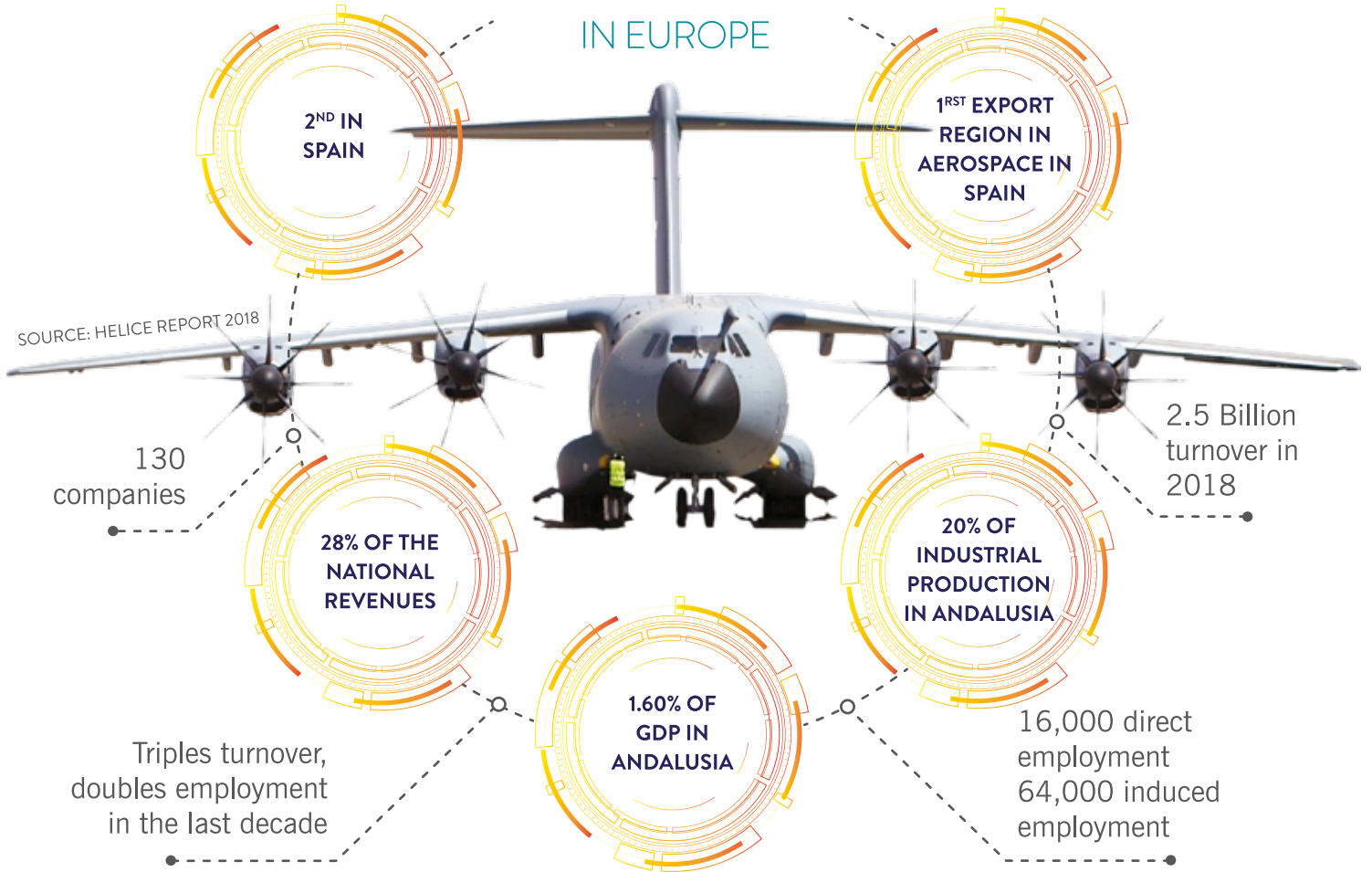
EU
508.2 MILLION
CONSUMERS

SPAIN
46.5 MILLION
CONSUMERS

ANDALUSIA
8.4 MILLION CONSUMERS

ANDALUSIAN AEROSPACE INDUSTRY AT A GLANCE

ONE OF THE TOP 5 AERONAUTICS HUBS IN EUROPE



AEROSPACE INDUSTRY

4 SEVILLA

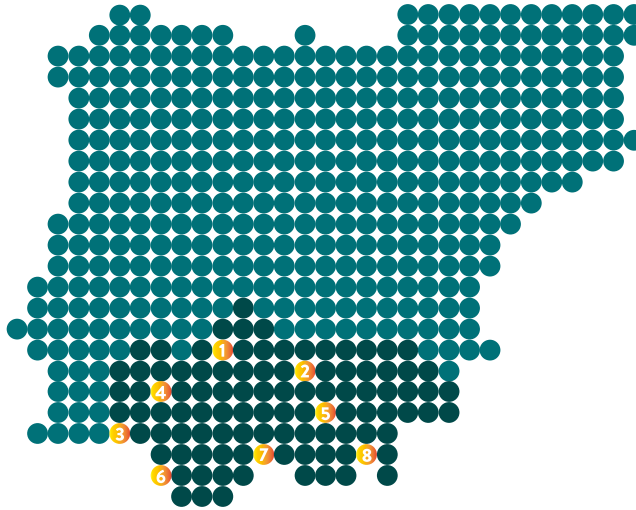
- AERONAUTICAL ENGINEERING UNIVERSITY
- AERNNOVA, ALESTIS, ACITURRI (TIERS 1)
- AERÓPOLIS, TECHNOLOGICAL PARK
- AIRBUS (OEM)
- A400M FINAL ASSEMBLY LINE
- AIRBUS PILOT TRAINING CENTER
- CATEC (CENTER FOR ADVANCED AEROSPACE TECHNOLOGIES)
- CTA (TECHNOLOGICAL CORPORATION OF ANDALUCÍA)
- BADCOCK MCS ESPAÑA
- INTERNATIONAL AIRPORT OF SEVILLE
- PCT CARTUJA, TECHNOLOGICAL PARK

1 CÓRDOBA

- PEGASUS AERO GROUP
- PATRIA PILOT TRAINING

3 HUELVA

- CEUS UAS CENTER
- INTA (NATIONAL INSTITUTE OF AEROSPACE TECHNOLOGY)



6 CÁDIZ

- AERNNOVA, ALESTIS, ACITURRI (TIERS 1)
- AIRBUS
- AERONAUTICAL ENGINEERING UNIVERSITY
- CFA (ADVANCED MANUFACTURING CENTER)
- FTE JEREZ AIRLINE PILOT TRAINING ACADEMY
- INTERNATIONAL AIRPORT OF JEREZ
- TEC, TECHNOLOGICAL PARK

8 ALMERÍA

- GERMAN-SPANISH ASTRONOMICAL CENTER

2 JAÉN

- ATLAS UAS CENTER

5 GRANADA

- ASTROPHYSICS INSTITUTE OF ANDALUCÍA

7 MÁLAGA

- INTERNATIONAL AIRPORT OF MALAGA
- TECHNOLOGY PARK OF ANDALUCÍA PTA

+100 YEARS OF AEROSPACE CULTURE IN THE MANUFACTURE AND ASSEMBLY OF AIRCRAFTS

STRONG AEROSPACE CLUSTER IN THE SOUTH OF EUROPE

ANDALUSIA IS IDEALLY PLACED TO OFFER ADDED-VALUE ENVIRONMENT FOR COMPETITIVE AEROSPACE COMPANIES

AERÓPOLIS, THE ONLY TECHNOLOGICAL PARK DEVOTED TO AEROSPACE INDUSTRY IN SPAIN



OEM AND TIERS 1

40% of the Airbus workforce in Spain is located in Andalusia.

+1,600 Airbus employees work in Spain for the A400M program. Over 1,100 employees belong to FAL located in Seville.

Strong concentration of Tiers 1 in Spain.

Aciturri's acquisition of Airbus' shares in Alestis reinforces the company's position as a supplier of reference in the aerospace sector.

High level of specialization of Tiers 2 and 3 to provide support to Tiers 1 located mainly at Aerospace industry sites in Seville and Cadiz.



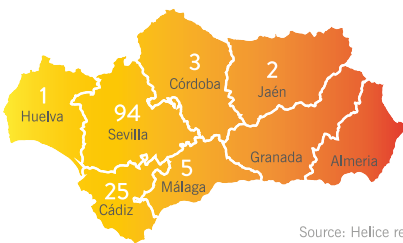
STRONG PRESENCE OF THE MAJOR EUROPEAN OEM IN SEVILLE AND CADIZ: AIRBUS.

SUPER TIERS 1 IN SPAIN HAVE PRESENCE IN SEVILLE AND CADIZ: AERNNOVA, ACITURRI AND ALESTIS.



AEROSPACE SUPPLIERS

COMPANIES BY PROVINCES



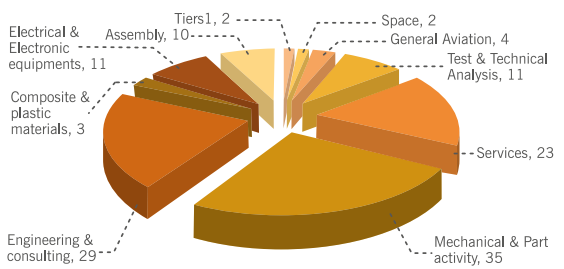
Source: Helice report 2018

HIGH CONCENTRATION OF AEROSPACE INDUSTRY IN SEVILLE AND CADIZ AXIS.

SEVILLE AND CADIZ ACCOUNT FOR 90% OF THE SECTOR

MALAGA HAS AN EMERGING AEROSPACE SYSTEMS CLUSTER

COMPANIES BY ACTIVITIES





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