



PRESS KIT



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I. DATA SHEET ADM SEVILLE 2018	
Concept	IV ADM Seville 2018 the most important aerospace business event in Spain: more than 1.100 professionals from 351 companies, from 28 countries will hold more than 8.000 business meetings and a full panel of conferences and roundtables and strategic visits, in an exclusive and professional event.
Date	May 2018, 15-18.
Location	FIBES-Exhibition Center; Aerópolis (Seville); Tecnobahía (Cádiz); and companies headquarters.
Organizers	Department of the Economy and Knowledge (through Extenda-Trade Promotion Agency of Andalusia) and French firm BCI Aerospace, a specialist in international meetings in the aeronautical sector.
Sponsors	Airbus Group (Platinum Sponsor); Aernnova, Alestis Aerospace, Aciturri, Carbures, Sofitec y Stratasy (Gold Sponsors).
Official Support	IDEA, Agencia de Innovación y Desarrollo de Andalucía; Hélice, Cluster Aeroespacial Andaluz; Tedae, Asociación Española de Empresas Tecnológicas, de Defensa, Aeronáuticas y Espacio; CATEC, Centro Avanzado de Tecnologías Aeroespaciales; e Invest in Spain (ICEX-Ministerio de Economía y Competitividad).
Target	Only professionals, with previous sign up.
Periodicity	Every two years.
Goals	<ul style="list-style-type: none"> → The objective of the fourth edition of ADM Seville is to improve the international nature and the quality of contractors at the event. → ADM Seville 2018 represents another step forward in the development of a strategy to support the internationalisation of a sector. → Consolidate its position as a key fixture in the global business circuit for the sector. It is also a strategic forum in which to underscore the capacities and projects of the aerospace cluster in Andalusia in the presence of the main manufacturers in the sector.

Aerospace & Defense Meetings-ADM Sevilla 2018 is 80% co-financed with funds from the European Union, through the Andalusia ERDF Operating Program for 2014-2020.

II. PRESS RELEASE

THE 4th AEROSPACE AND DEFENSE MEETINGS SEVILLE 2018, WITH MORE THAN 1.100 PROFESSIONALS FROM 28 COUNTRIES, POSITIONS ANDALUSIA AT THE CENTRE OF THE INTERNATIONAL AERONAUTICS BUSINESS

- The president of the Government of Andalusia, Susana Díaz, opened the day of professional conferences and panel discussions.
- Andalusia has already become Spain's leading exporter, with €3,293 million in 2017, more than half of Spain's overseas sales.
- Aeronautics has become Andalusia's biggest export sector, exceeding olive oil, in which it is also strengthening its position as world leader.
- ADM consolidates its international character, with the world's four leading manufacturers and 47 other large contractors, of which two thirds are from abroad.
- It strengthens its status as the benchmark event for the Spanish aerospace industry: Twelve Spanish regions are attending, and two thirds of the Spanish companies are from outside of Andalusia.
- It covers more than 8000 m² of the central area of the FIBES site, with 226 stands with attendees taking part in more than 8000 B2B meetings.

More than a thousand attendees (1.100) from more than 350 organisations in the aeronautics and aerospace sector from 28 countries are taking part in Aerospace & Defense Meetings-ADM Seville 2018, which takes place from 15 to 18 May. In its fourth edition, ADM Seville has consolidated its status as the most important aerospace business event in Spain, and, therefore, as the key date for a strategic sector of which Andalusia is the leading exporting region, with €3,293 million in 2017. They account for 57% of Spain's total sales, and give the region's overseas trade balance a surplus of €1,613 million, making this sector Andalusia's leading exporter, with 10.7% of total sales.

ADM Seville is organized by the Department of Economy and Knowledge, through its Extenda-the Trade Promotion Agency of Andalusia, and by the French company BCI Aerospace, a specialist in international meetings for the sector. It is held every two years at FIBES, and it is the key date for the aerospace cluster in Andalusia and Spain as a whole to showcase its capabilities and projects to the leading manufacturers.

The president of the Government of Andalusia, Susana Díaz, has been the star guest at the event's opening day, which included professional talks and panel discussions. There was also a talk by the economist José Carlos Díez, on the influence that a sector like aerospace has on a region's economy.

ADM Seville 2018 will be officially opened on Wednesday the 16th by the Minister of Economy and Knowledge of the Government of Andalusia, Antonio Ramírez de Arellano, and other officials, as well as by Head of PreFAL Tablada from Airbus Defence and Space, Juan José Silva. Also taking part will be the president of TEDAE, Jaime de Rábago, and executives of the

three of Spain's tier 1 aerostructure manufacturers, Alestis, Aernnova and Aciturri, and of Sofitec and Carbures, Andalusian manufacturers of aerostructures, metallic and composite components, and of Stratasy, the American multinational providing 3D printing for the industry. All of these are sponsors of the event.

ADM Seville 2018 is also supported by the IDEA Agency of the Department of Employment, Business and Trade, with which Extenda shares a stand, through their joint project Invest in Andalucía; Aerópolis, Andalusia Aerospace Park; TecnoBahía Technology Park and Invest in Spain, through ICEX, part of the Ministry of Economy and Competitiveness. It is also supported by the industry, at both the national level, with Tedae (Spanish Association of Technology, Defence, Aeronautics and Space Companies), and the regional, by Hélice, the Andalusian Aerospace Cluster.

Strengthens its International Character

In its two main days, May 16 and 17, ADM Seville occupies more than 8000 m² of the central area of the FIBES site, where there are 226 stands. These are the stands of some of the 262 major contractors and participating exhibitors from 28 countries, including ten aerospace clusters from different regions and countries, which together represent over 500 companies.

In its fourth edition, ADM Seville strengthens its capacity to serve as a business lever for the industry's supply chain, with the world's big four manufacturers, and 47 other large contractors, of which two thirds (31) are from abroad and the rest (20) from Spain. It also strengthens its international character this year, and has been certified as a "Trade Fair Granted Full International Scope" by the Ministry of Economy and Competitiveness.

In this respect, for the first time it welcomes contractors from the USA, such as Stratasy, the multinational providing 3D printing to industry, as mentioned above; Industrial Metal International, the largest supplier of 17-4PH tubes for aeronautics, and Titanium Industries, a world leader in special metal supply solutions. It also welcomes new countries for the first time, including Japan, with Aero Group, a company with over 200 years experience in aerospace and defence, South Korea, with AT Corporation, and Belgium, with CMI Defence, leader in systems for light and medium-sized armoured vehicles, all of them markets of great interest.

Participation by contractors from the Asia-Middle East region is up by 50%, with companies such as Strata, from the United Arab Emirates, which produces aircraft components for Airbus and Boeing; Aero Mobility Support, one of Pakistan's leading engineering companies; and Commercial Aircraft Corporation of China (COMAC), the leader in civil aviation programs for the Chinese market. Overall, two thirds of large contractors and up to 39% of business participation (103) are from overseas.

Among the 103 overseas participating companies, France is the leader, with 29, followed by Italy with 21, Austria with 7, and the United States with 7, United Kingdom with 6; and Morocco and Germany with 5 each. There are also companies from Algeria, Argentina, Belgium, Canada, China, South Korea, United Arab Emirates, Israel, Japan, Pakistan, Portugal, Poland, Czech Republic, Switzerland, Sweden, Taiwan and Turkey.

In terms of turnover, the most impressive attendance is that of the four major global manufacturers, Airbus, Boeing, Bombardier and Embraer. There are also another 47 large contractors (OEMs) and first-tier manufacturers such as Safran; Alestis Aerospace SL; Aciturri

Aeronáutica; Aernnova; Aero Vodochody Aerospace AS; Dassault Aviation; General Dynamics European Land Systems; MAP - Advanced Manufacturing Aeronautical Products; Mecachrome France; Potez Aéronautique; Celestica; GECl; INDRA; GAZC; and Zodiac Hydraulics.

Over a hundred and a thousand (1.100) professional attendees at the two main days of ADM Seville will hold over than 8000 B2B meetings, all previously arranged and organized using a system for coordinating agendas and interests, and establishing privileged contacts between the contracting agents of international, national and Andalusian companies, which can then lead to business opportunities.

Benchmark Event for Spain

The fourth edition of ADM Seville (2018) also strengthens its importance as the largest business event in the sector in Spain, with two thirds of participating Spanish companies from outside Andalusia. Together, there are 159 companies from 12 Spanish regions, of which 58 are Andalusian and as many as 101 from other regions. Specifically, after Andalusia, Madrid contributes the most companies with 47; followed by the Basque Country and Catalonia, with 18, each; Valencia Region, and Castile and León, with five each; Aragon and Galicia, with two companies each; and finally Murcia, Asturias, Navarre and the Canary Islands, with one each.

ADM Seville 2018 is another advance in implementing the strategy to support the internationalization of the sector that the Andalusian Government, through Extenda, has been promoting individually since 2005. Following the success of the first three editions every two years since 2012, this year's ADM will again showcase Andalusian aerospace as a world benchmark, and Andalusia as the capital of Spain's aeronautical industry and a strategic location for investment in complex industry projects.

This fourth edition of ADM Seville is 80% co-funded by the European Union, through the FEDER Operational Program for Andalusia 2014-2020.

Conferences and Visits to Companies

ADM Seville has also become the forum for know-how and debate for Spain's aerospace industry. The opening day's programme of talks and panel discussions, organized by TEDAE, has featured senior managers from the Spanish industry's leading companies and organizations.

The first professional panel was entitled «Aeronáutica civil, los nuevos modelos de negocio» (Civil Aeronautics: the new business models). It featured the heads of Airbus Defence & Space and Altran Aerospace, and questions were raised about how business models in the aeronautics industry are changing, and emerging new technologies like augmented reality, drones for all kinds of activities, Big Data and virtual reality.

The activity continued with two more panel discussions. The first, was «Aeronáutica militar, el sostenimiento, necesidad y oportunidad» (Military Aeronautics: Sustainability, Needs and Opportunities). It included senior representatives from the Spanish Ministry of Defence and ITP Aero. They addressed issues such as the new needs of military operators in the field of aeronautical services. The third panel, «Espacio, construyendo el nuevo ecosistema especial» (Space: building the new space ecosystem), included speakers from Alter Technology, Hisdesat and Seville City Council. It dealt with how space programs can add value and how new launcher technologies will change the way we go into space.

The closing the day was presided by Antonio Conde, director of Innovation and Digital Transformation at Cisco and president of Sevilla Futura. He explained how development and innovation in the aerospace sector, seen from the three perspectives mentioned above, will affect everyone's daily life, now and in the future.

After this day and the two devoted to business meetings between participating companies, on the 18th May overseas visitors will visit the A400M FAL and other Airbus DS facilities in Seville, and other companies of its interest: CATEC, in Aerópolis (Seville), and TecnoBahía (Cadiz).

More Aeronautics than Olive Oil

Andalusia is Spain's leader in aeronautics exports, with more than half of the country's total sales (57%). A figure that in 2017 reached an all-time record of €3,293 million, out of a national total of €5,760 million. This was a 12% increase on 2016 (€2,941 million), compared to a fall of 6.9% for Spain overall.

Thus, the aeronautical sector, which over the last decade has quadrupled its contribution to overall Andalusian exports, and now accounts for 10.7% of total sales, has become the region's leading exporter, even exceeding olive oil (€2,961 million). All this, despite the fact that exports of olive oil or 'liquid gold,' have been growing by over €200 million a year over the last decade, and that Andalusia continues to increase its global leadership in sales of this product.

Current records show that Andalusia has doubled its aeronautical export sales in just two years, from €1,553 million in 2015 to €3,293 million in 2017 (112%). This represents a new qualitative leap that in the last decade (2008 to 2017) has lead it to multiply exports seven-fold.

This is growth unequalled anywhere else in Spain, and four times the national average. It has increased Andalusia's weight in the national GDP to 37%, going from 20.7% in 2008 to 57.2% of Spanish sales by this industry, far surpassing the Madrid region, the leader until 2015. Currently, Andalusia exports almost twice as much as the Madrid region (€1,688 million) and 10 times as much as the Balearic Islands (€312 million). Sales that are a positive contribution of €1,613 million to Andalusia's trade balance.

These figures are even more valuable, as this is an industry with the most advanced technology and complexity. While it provides diversification into new markets (seven non-European countries are among the top ten destinations), it also allows the Andalusian overseas sector to continue growing in European markets (Germany, France and the United Kingdom are the top three). These are markets considered 'mature' for Andalusia, as while it continues to be the leader in the food & agriculture sector, growth margins have shrunk.

Germany was the top destination in 2017, with €1,093 million, 33% of the total, to which Andalusia doubled its 2016 sales (up 104%). It pulled ahead of the traditional leader, France, which grew by 3.7% to €739 million (22.4%). Behind France came the UK, with 726 million (22% of the total), which fell by 13.7%, after having increased its sales by a factor 95 in 2016.

The fourth to the tenth destinations for Andalusia are all non-EU markets. Turkey was the biggest 2017, with €250 million, 7.6% of the total, increasing by a factor of 54 its figure for the previous year (up 5,322%). It is followed by Malaysia, with €134 million, 4.1% of the total and an increase of 9.7%; Saudi Arabia, with €66 million (2%), an increase of €46 million (4.529% up); United States, with €58 million and a 45% increase; Kazakhstan, with €55 million,

an increase of 0.3%; Thailand, with €43 million, which grew by 55%; and Bangladesh, with €29.4 million, a market with no sales recorded for 2016.

More Companies and Provinces

Aeronautics is a highly internationalized sector, in which more than half the companies exported products in 2017, up to 65 of the 117 that make up the Andalusian cluster, 22.6% more than in 2016. Half of them, 31 companies, are regular exporters (four successive years exporting), 19.2% more than in 2016. These figures confirm the good progress during the current decade, in which the number of exporters has grown by 30%. This is in spite of the business concentration that the sector has experienced. More importantly, the number of regular exporters has doubled (up 139%), which contribute 99.9% of exports.

Five Andalusian provinces are already aeronautical exporters, although almost 100% of sales are concentrated around the Seville-Cadiz axis: Seville is the regional and national leader, with €2,980 million and an increase of 19.7% over 2016. It represents 91% of Andalusia's exports and 52% of Spain's. It is followed by Cadiz, with €308 million, 9.4% of the total, although it fell by 31%. Over the last few years, three other provinces have begun exporting, although their numbers are smaller. For example, Cordoba, with €4.1 million, Malaga, with €1.1 million and Huelva, with €182,000.

More Complete Aircraft

Export products have evolved significantly, following trends in the industry's programmes –especially those of Airbus– which have prioritized the manufacture of the aircraft final product over that of its component parts.

This has meant that the 'Other aircraft' segment (e.g., helicopters or airplanes) has become more prominent, increasing from 34% of total sales in 2008, to accounting for a hefty 82% in 2017, an increase of 19.1% over 2016 and sales worth €2,711 million. Also, there is the new segment 'Aircraft launching gear and ground flight entertainment,' which did not record any sales in 2008, but registered €9.4 million in 2017, 61% more than in 2016.

The 'Launching gear parts' are not very important in turnover and fell from 66% in 2008, to 17.4% in 2017, with a growth in sales value of 86%, from €307 million to €572 million, though down by 13% in the last year.

A Strategic Sector

According to the latest report on the aerospace sector by Cluster Hélice, for the year 2016, the Andalusian aerospace sector reached a provisional turnover of €2,400 million, 2.4% higher than in 2015. A figure that will increase significantly, well above €3,000 million, when the final balance is calculated, after some export results in that year stood at €2,941 million, incorporating final official data.

This provisional data from Hélice sets the aerospace sector's contribution to Andalusian GDP at 1.62% in 2016, with Andalusia being the third aerospace hub in Europe, after Toulouse and Hamburg, and the only one in Spain that completes the manufacture and assembly of a large aircraft, the Airbus A-400M.

III. INDUSTRY SUPPORTS ADM SEVILLE 2018

“In ADM Seville 2018, the aerospace cluster of Andalusia will have the opportunity to be shown to the main global manufacturers and contractors as what it is, the third aerospace pole in Europe and the first Spanish region in billing and export of this industry. A solid position supported by the Andalusian Government contributing to its main projects, investments and infrastructures”.

Antonio Ramírez de Arellano, Economy and Knowledge Conselor
for the board of Andalusia

“ADM Seville celebrates its fourth consolidated edition as the main business meetings of the aerospace industry in Spain. A business convention in which the leading companies, first level suppliers and subcontractors from all over the world will meet partners, suppliers and new clients within the frameworks of a cluster that shows its working capabilities in some of the main aeronautical projects in Europe”.

Vanessa Bernad, CEO of
EXTENDA - the Trade Promotion Agency of Andalusia

“ADM is an essential forum for the aeronautical sector. Airbus is committed to innovation, and together with our supply chain partners, we are committed to offering our customers smarter products and newer services. Airbus will be present at this fourth edition of ADM in Seville. There’s no doubt that it will again be a tremendous success and bring valuable insights to all attendees”.

Juan Silva, Airbus Representative in Andalusia

“ADM Sevilla is the most important aerospace event in Spain, which means an opportunity for Aernnova to meet with potential industry partners and increase our visibility abroad regarding technological capabilities in our country. As one of the top aerostructures companies in the world, Aernnova will be present at this ADM Sevilla 2018 demonstrating our commitment with technological development and Industry 4.0.”.

Iñaki López Gandásegui, AERNNOVA CEO

“ADM has been established as a showcase for the aerospace industry and as a platform to demonstrate the capabilities of our industry to the world. A space for identifying new opportunities to collaborate with subcontractors and to help build up a strong and reliable supply chain to address the exciting challenges that accompany our customers”.

Sergio Camps, Subcontracting Director, Aciturri

“Every two years, the Aerospace and Defense industry has a main event in Seville. ADM is the forum for business networking, in order develop commercial links and projects in the medium and long term, that may strengthen the national industry even more. For the consolidated network of suppliers in Andalusia, ADM is an excellent platform for their national and

international recognition. ALESTIS will attend this event and encourages all partners and suppliers to actively participate for the better success of ADM”.

Javier Díaz Gil, CEO Alestis Aerospace

“ADM is the sample of the capabilities and strength of the Aerospace and Defense sector in Spain and specially in Andalusia. Technology, knowledge and industrial capacity are determining factors in our industry and all this can be seen through ADM, a meeting place for exchange of experiences, strengthening, defense of the sector and development of new businesses. The experience of Carbures in the ADM for years has served to consolidate the company as a global leader in the sector, as it is a meeting point with the main global agents”.

Javier Moreno, General Manager Aerospace & Defense, Carbures

“ADM Sevilla is the most important business event of the aeronautical industry in Spain. For us in Sofitec it is essential, and so we support and sponsor it since its beginning”.

José Miguel Hernández, SOFITEC CEO

“ADM is the ideal platform in Spain to engage the aerospace industry and find out the latest innovations across the supply chain. As the sector continues to evolve at a rapid pace, it’s important that we use these opportunities to showcase the latest solutions that can enhance efficiencies, but can also disrupt traditional mindsets, so that we are best prepared to meet the challenges ahead”.

Andy Middleton, President, Stratasys EMEA



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