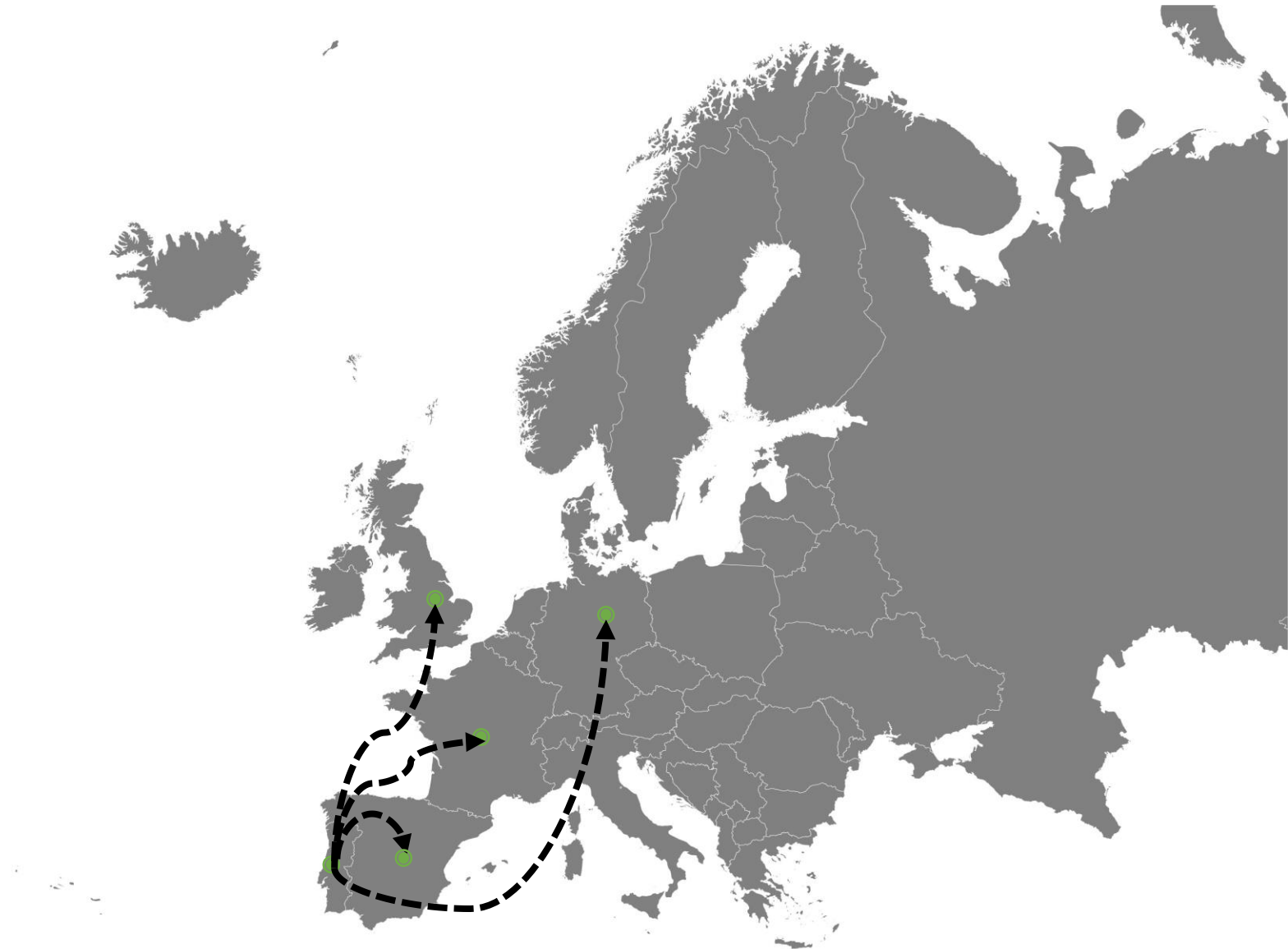


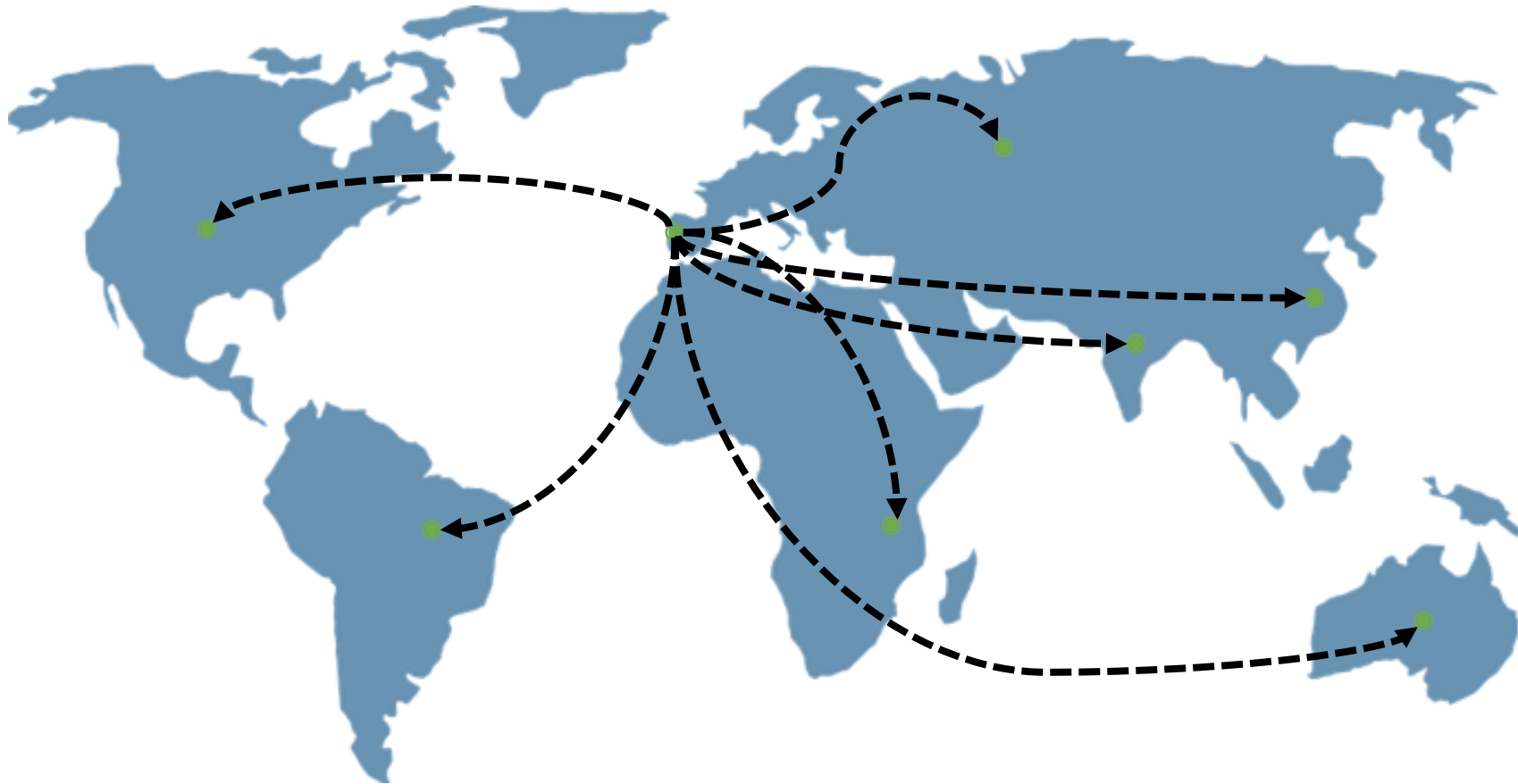
Who are we? an outlook on the Portuguese ASD industries



Main export markets for our members are in Western Europe due to proximity...

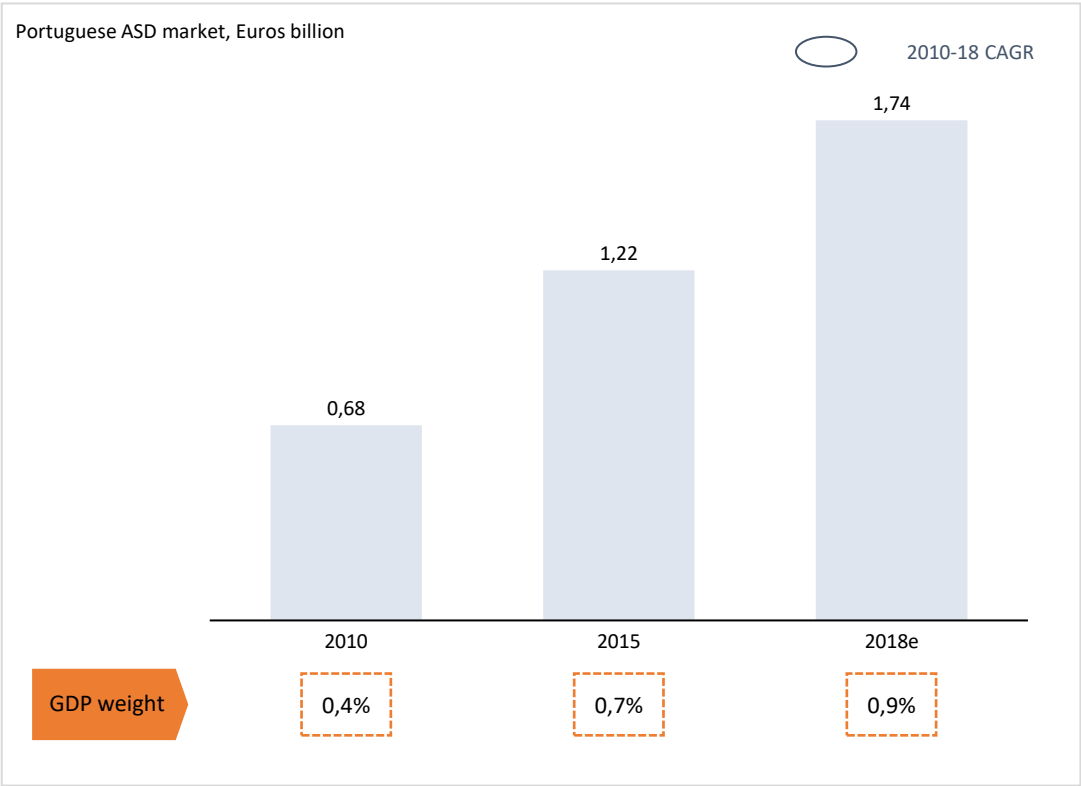


... but we have proven business models throughout the world, in fact Brazil is the largest importer of Portuguese aerospace exports due to Embraer group operation, with US the second market...



The Portuguese ASD market has been growing at an average annual rate of ~13% over the last eight years

Aeronautics, Space and Defense market size in Portugal



36%
Embraer, TAP
ME and OGMA
revenues

25%
ASD weight in
players' total
revenue

€173k
average
revenue per
worker

	EU	+5,7%
	PT	+12,5%

Sources: Source: Amadeus, ASD, TAP, ANA, Marketline, AEDCP, Pordata

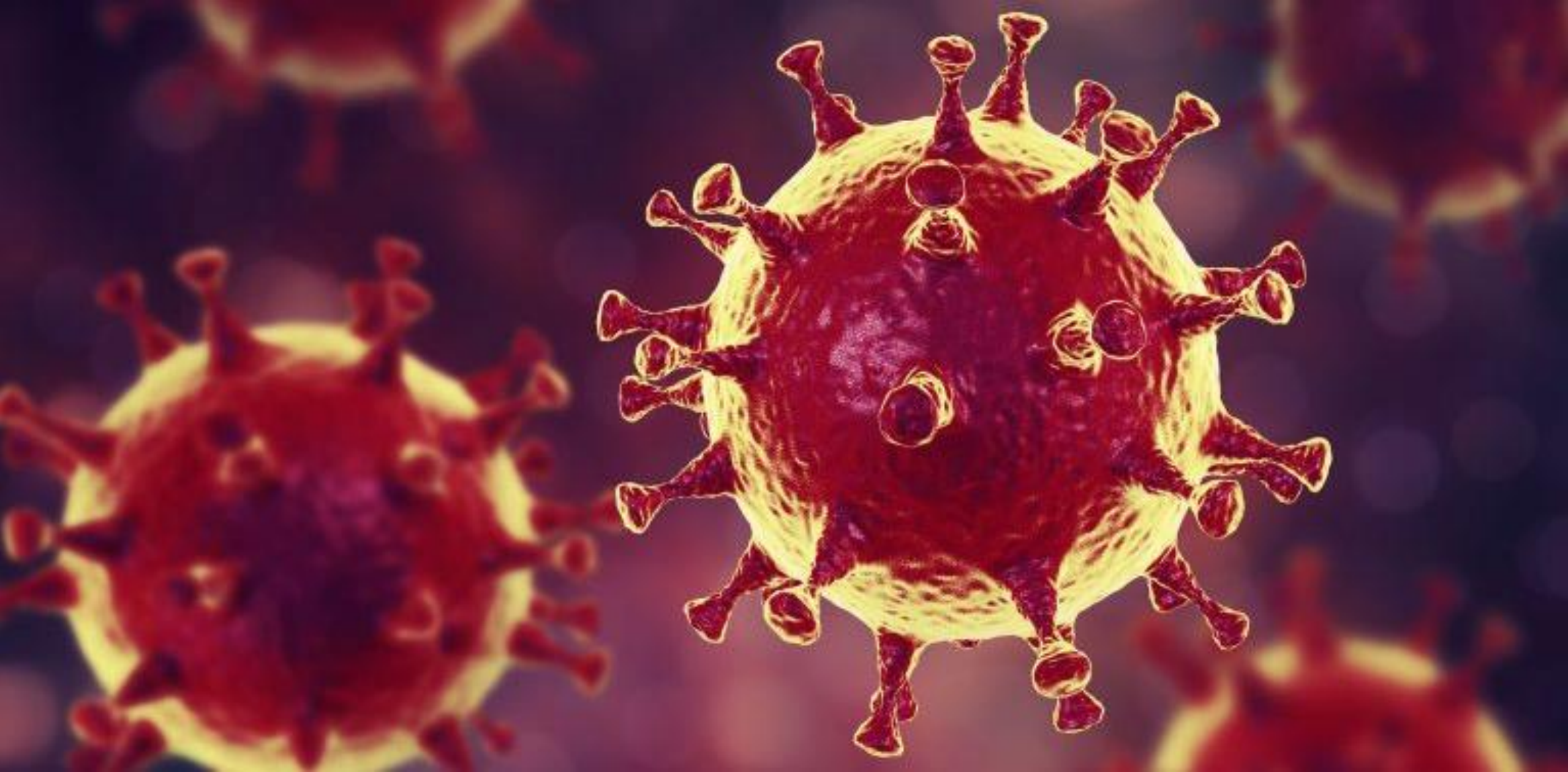
Aerospace Portuguese ecosystem is attracting more and more international players ...



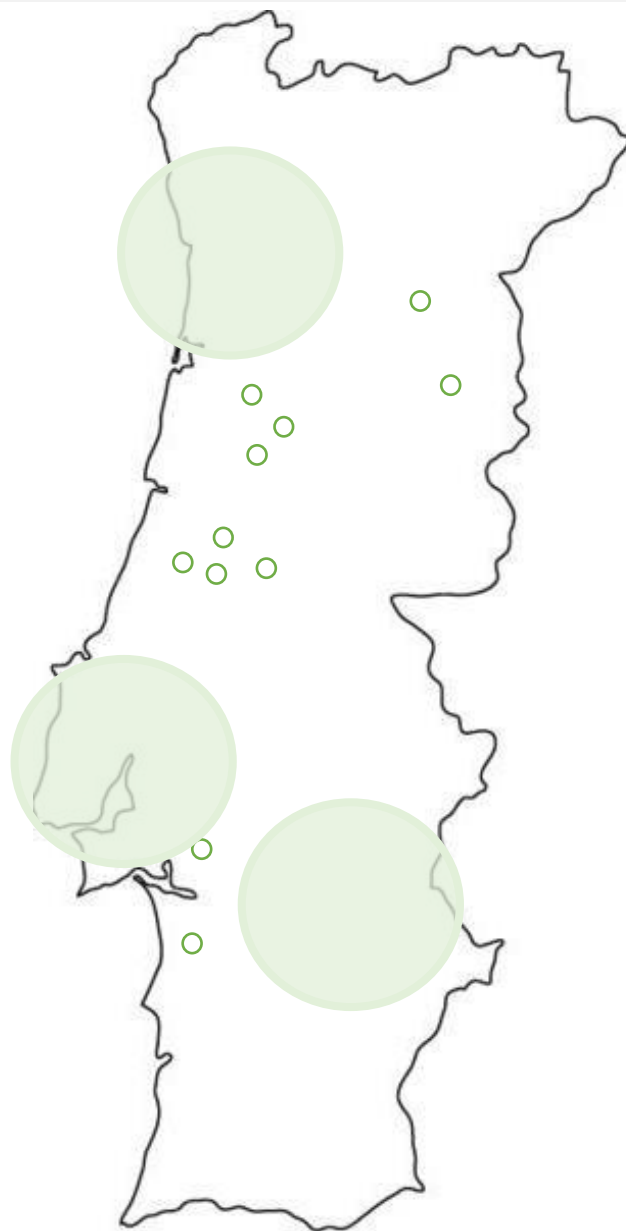
Going Digital ...



COVID19

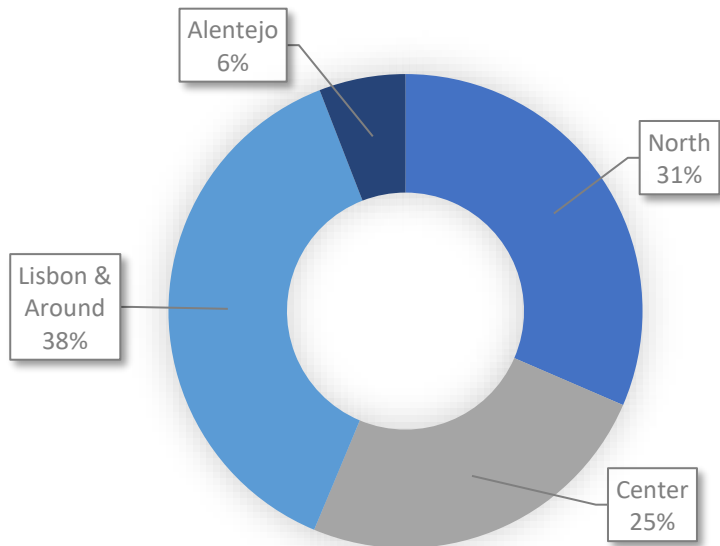


We are a national cluster with three main geographical activity poles ...

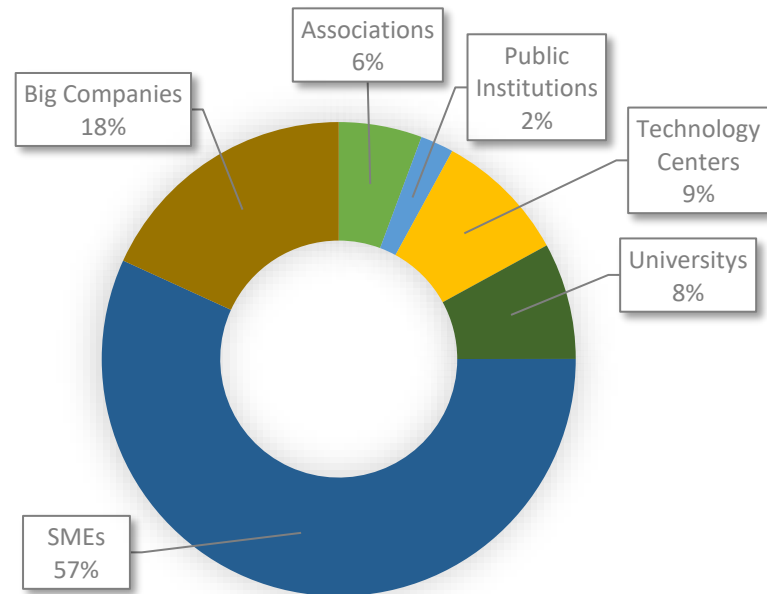


Some of our numbers...

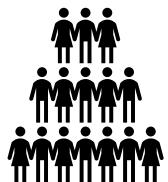
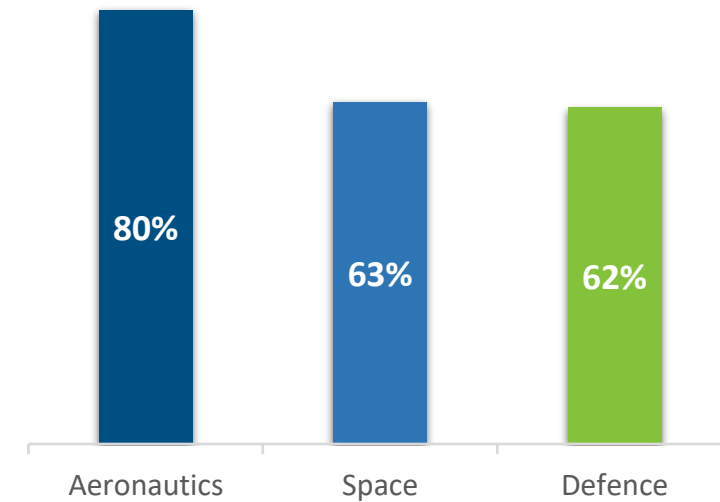
Geographical
Localization



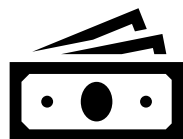
Type of Entities



Sectors



97
Members

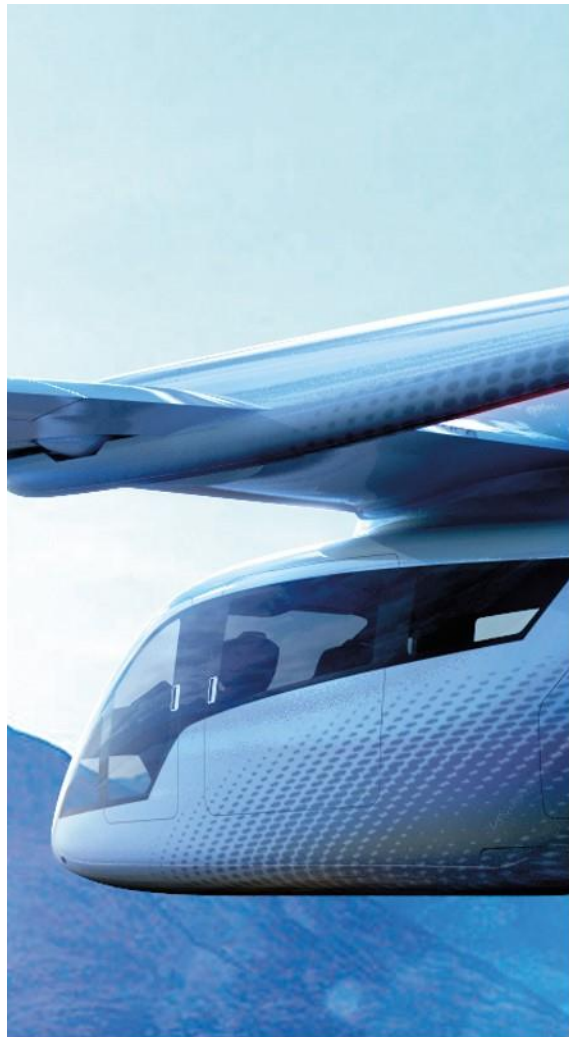


1,74 MM €
Business Volume



87%
Export

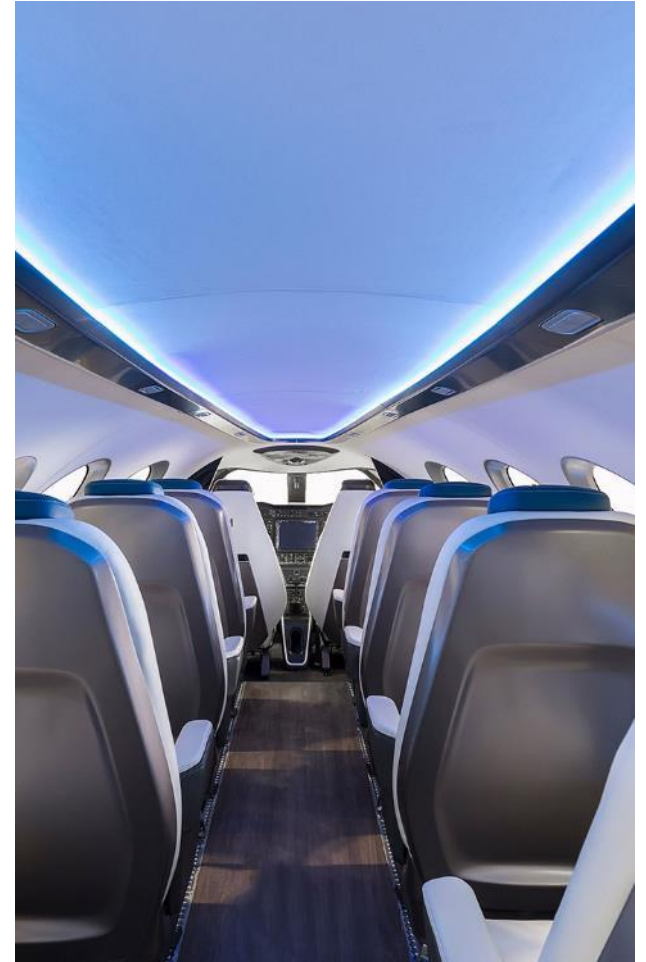
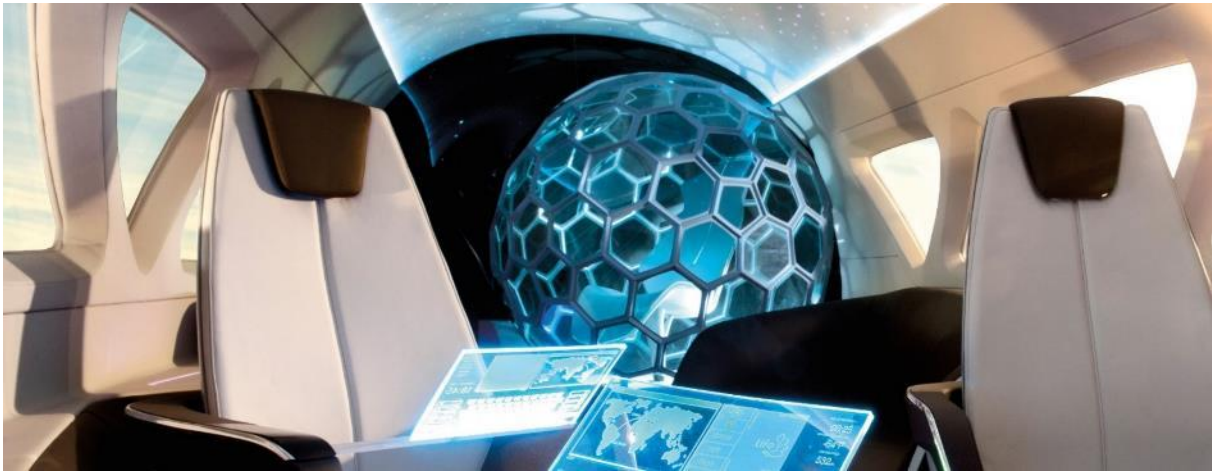
Our members...



Our Members...



Design... from aircraft interiors to new plane configurations, from the sketchboard to full-scale prototyping



Design... from aircraft interiors to new plane configurations, from the sketchboard to full-scale prototyping



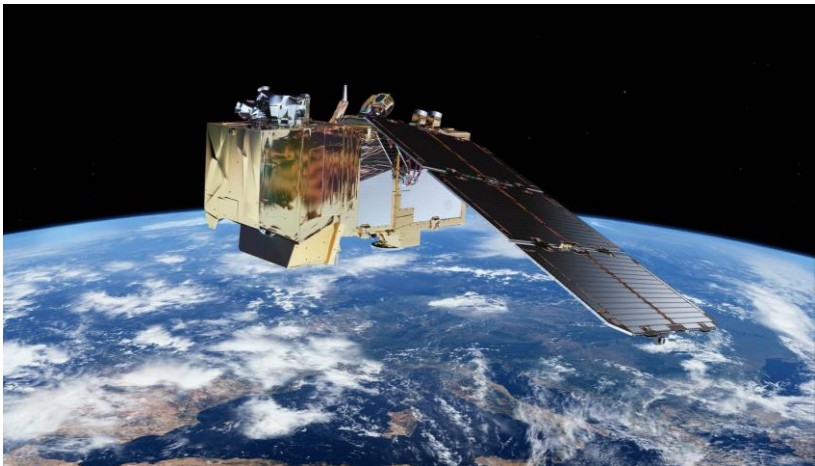
Design... from aircraft interiors to new plane configurations, from the sketchboard to full-scale prototyping



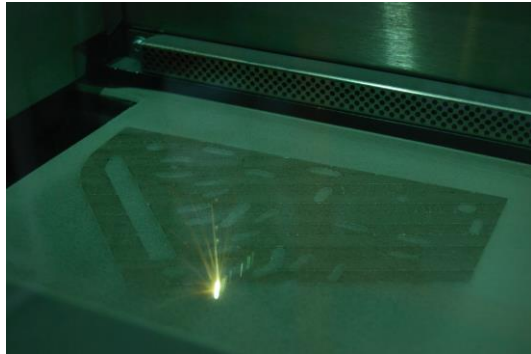
Design... from aircraft interiors to new plane configurations, from the sketchboard to full-scale prototyping



Engineering... from aerostructures to systems and products



Manufacturing... from tooling to machining to systems integration and testing



MRO ... from components to systems to full aircrafts maintenance and retrofit





Markets and Opportunities



Innovation and Value Creation



People and Competences



Funding and Regulatory

Our annual event: AED DAYS 2021

2019 Edition

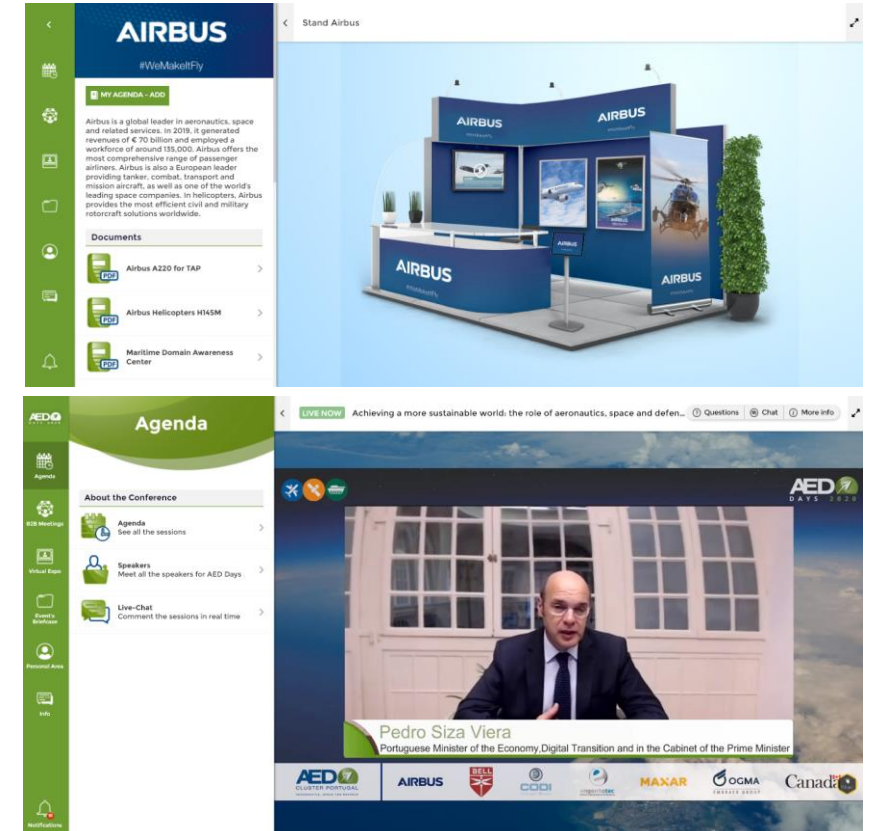
+430 participants
+250 companies
18 countries



2020 Edition

+760 participants
+300 companies
22 countries

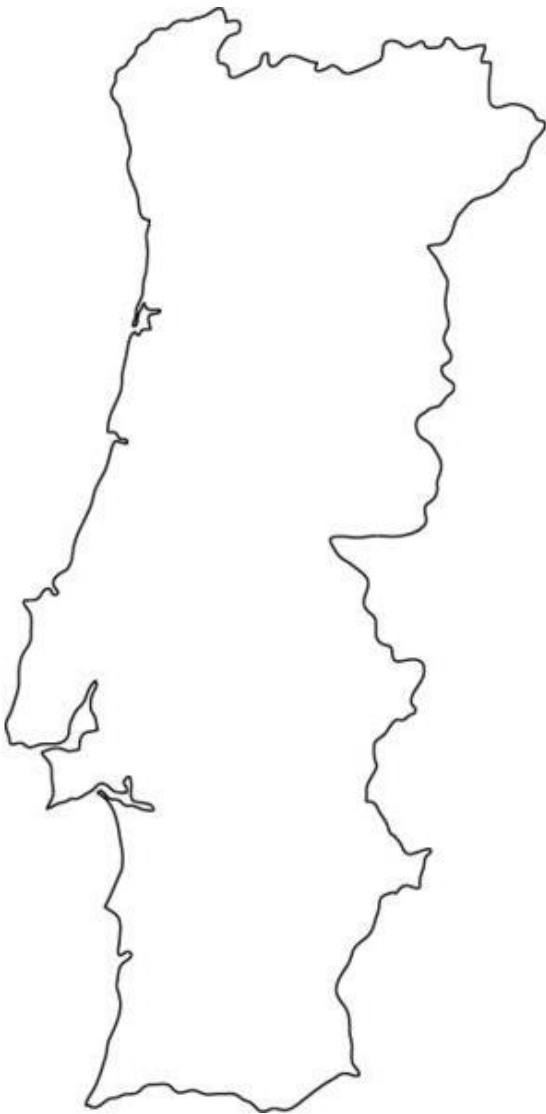
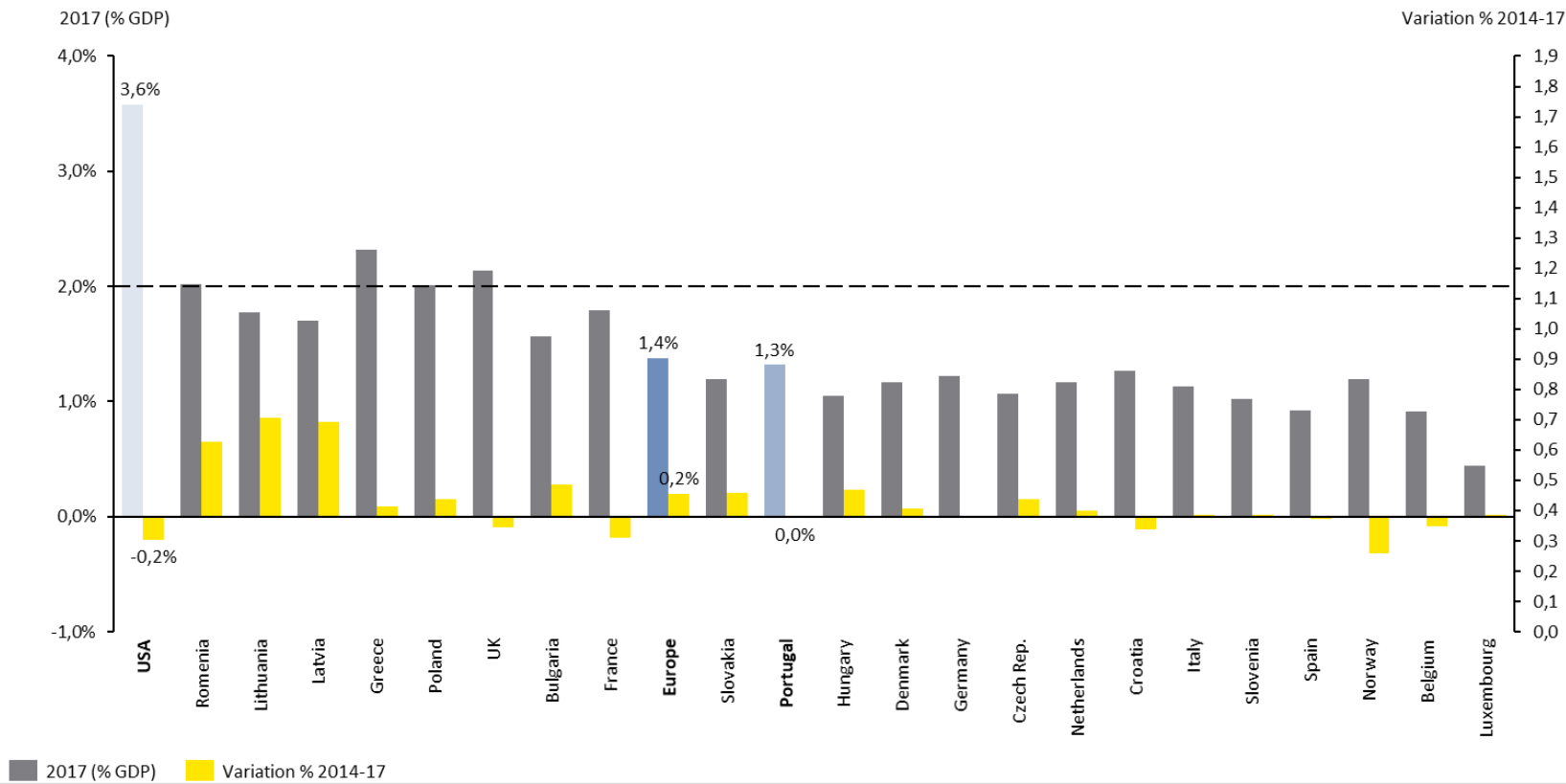
*28 September
to
01 October*



Defence Market, what is the Portuguese context?

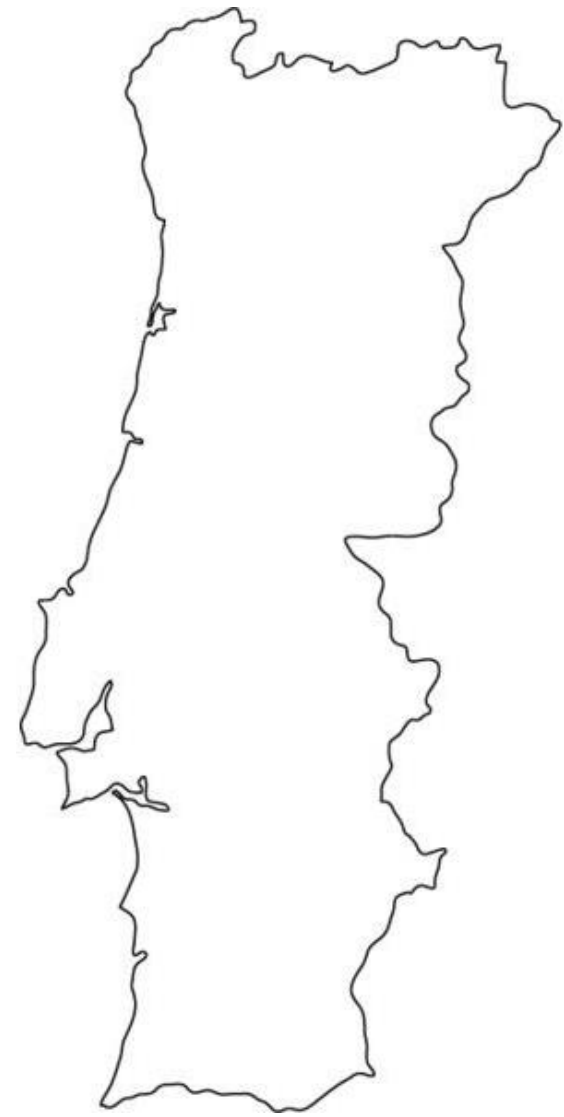
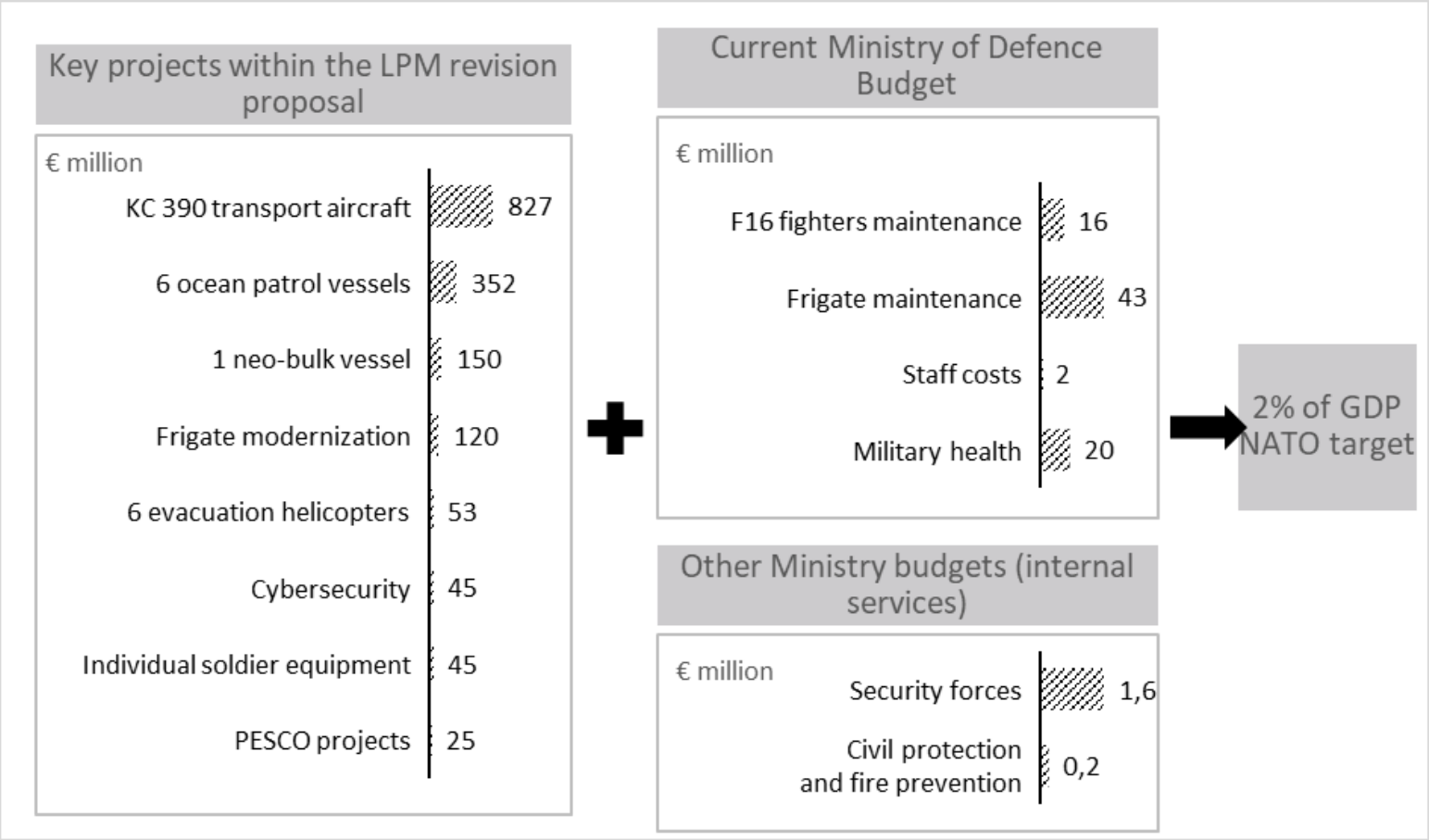
Portugal is investing...

Europe and the US defence spending in 2017 (% of GDP, % of 2014-17 variation)



Defence Market, what is the Portuguese context?

Military Programming Law : 4,74 Billion euros for 12 years



After 2027 ...

Thank You !

RUI SANTOS
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JOSÉ NEVES
President
AED CLUSTER PORTUGAL

