



 **Sviluppo** Campania

FSC  Fondo per lo Sviluppo
e la Coesione



AEROSPACE



THE AEROSPACE SUPPLY CHAIN IN CAMPANIA



Cutting-edge technologies, highly qualified personnel and specialisation in the manufacture of textile components. In the regional economic system, the Aerospace sector plays a leading role, both in terms of **industrial presence** and the high content of **technological knowledge developed**.

The characteristics that make Aerospace a promising area of experimentation to support scientific excellence in Campania are:

- a very broad value chain, developed and spread throughout the world;
- a few medium-large players (mainly assemblers) flanked by numerous small- to medium-sized players capable of developing cutting-edge technologies, implementing production processes and guaranteeing the quality and precision technical standards required by the aerospace industry;
- high capital requirements;
- high expenditure on R&D and highly qualified personnel.

As of 31 December 2021, **291 companies were active in the aerospace industry, which is about 8% of all active companies in Italy.**

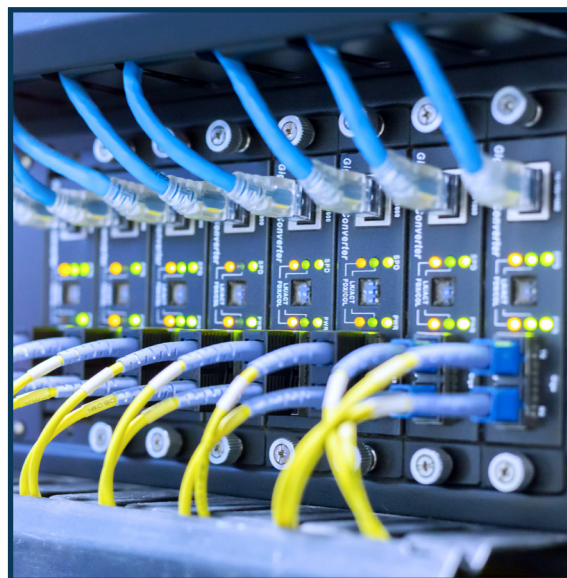
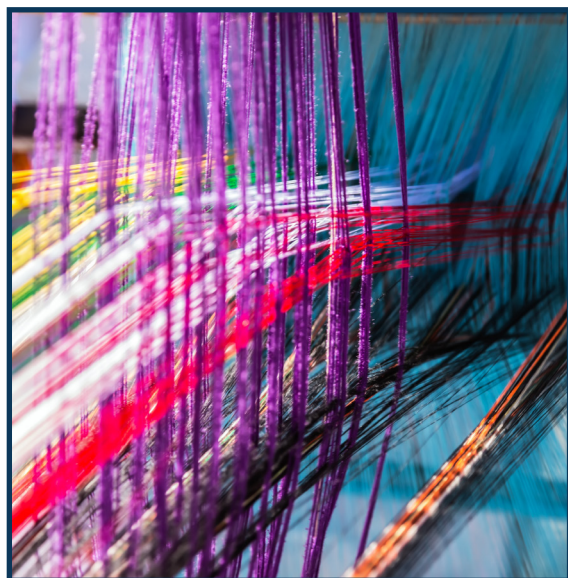


Tab. 1 – Distribution of enterprises – Aerospace chain – Campania region - Years 2019-2021

Year	2019	2020	2021
Total	308	293	291

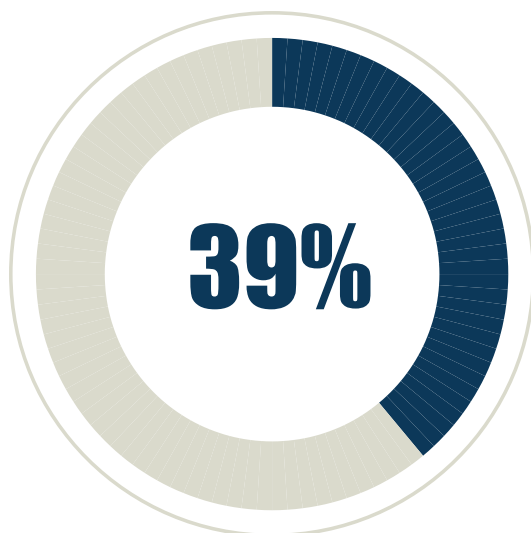
Source: data Infocamere 2021

In addition to companies producing aircraft, spacecraft and related instruments, the statistic includes production of parachute fabrics, telecommunication equipment, measuring and navigation instruments, lighting instruments, the manufacture of mechanical parts and electrical and electronic equipment.

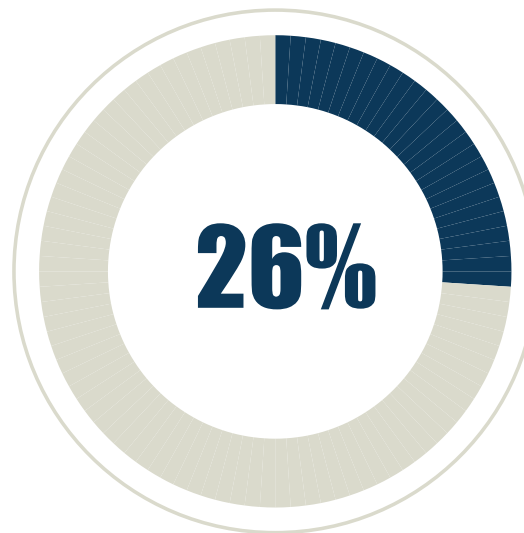


Companies from Campania are mainly active in the manufacture of textile components:

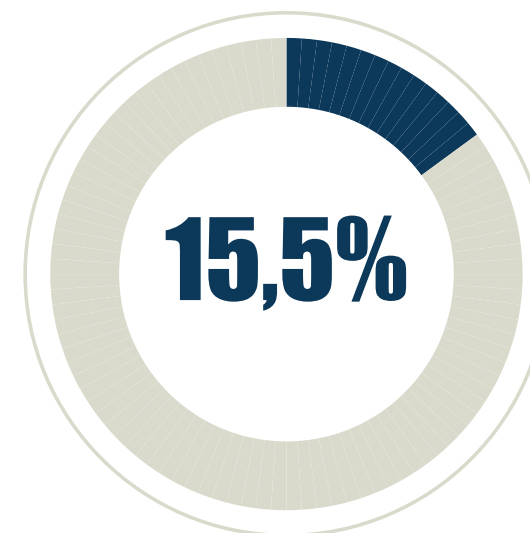
parachute fabrics



manufacture of telecommunication
equipment (navigation, hydrology, geophysics
and meteorology instruments)



manufacture of aircraft,
spacecraft and related
equipment





ENTERPRISES



Distribution by class of employees and production value

With regard to company size, which is shown below in Tables 2 and 3 and Figs. 1 and 2 (distribution by class of employees and value of production), the figures for the aerospace sector in the Campania region deviate slightly from the average characteristics of Italian companies: in this sector there is a **clear prevalence of SMEs (Micro/Small and Medium Enterprises)**, but the Small (10-49 employees) and Medium Enterprises (50-249 employees), reach the significant percentage of 20% (approximately). In the other supply chains, the prevalence of micro enterprises, those with up to 9 employees, is significantly more pronounced: e.g. for agro-food 88% and for TAC and goldsmith 86%.

In the case of the aerospace supply chain, the process of entrepreneurial development of the regional economy, with the leap from micro to small or medium-sized enterprises, is already well underway, with further potential for growth and strengthening of enterprises and their transition to sizes that allow for the creation of faster economies of scale and wider entrepreneurial margins, with beneficial repercussions on the territory.

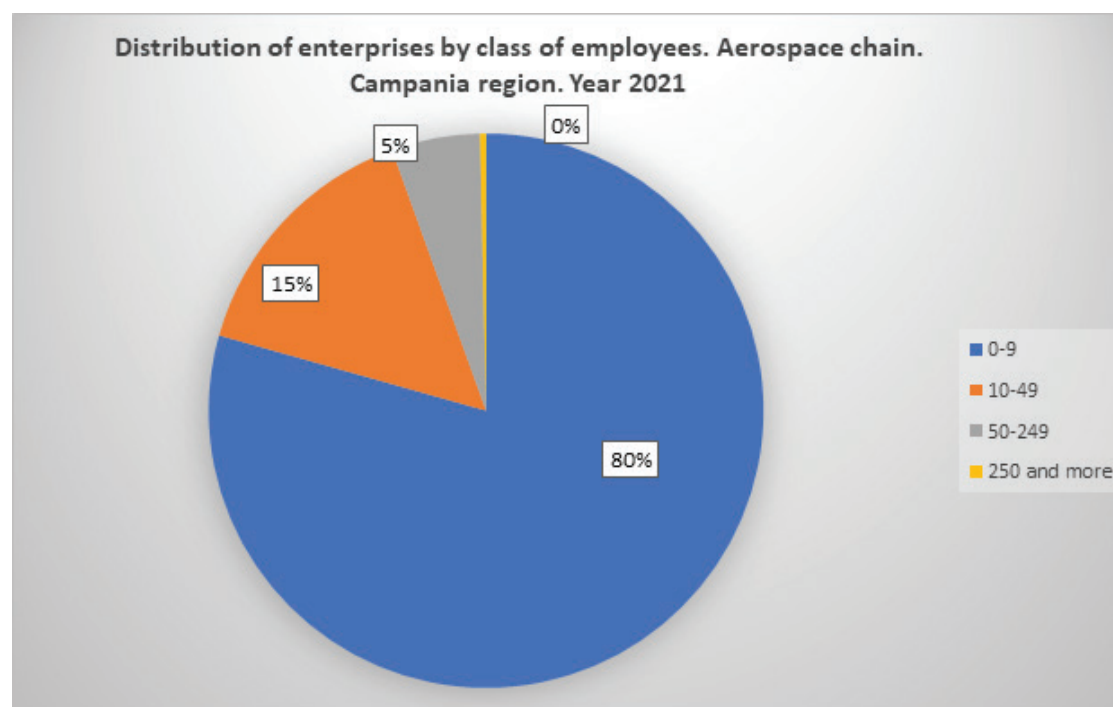


Tab. 2 – Distribution of enterprises by class¹ of employees. Aerospace chain. Campania region. Year 2021

Class of Employees	Micro 0-9	Small 10-49	Medium 50-249	Large 250 - oltre	Total companies
Total per class	231	44	15	1	291

Source: data Infocamere 2021

Fig. 1 - Distribution of enterprises by class¹ of employees. Aerospace chain. Campania region. Year 2021



Source: data Infocamere 2021

¹ EU MPMI classification

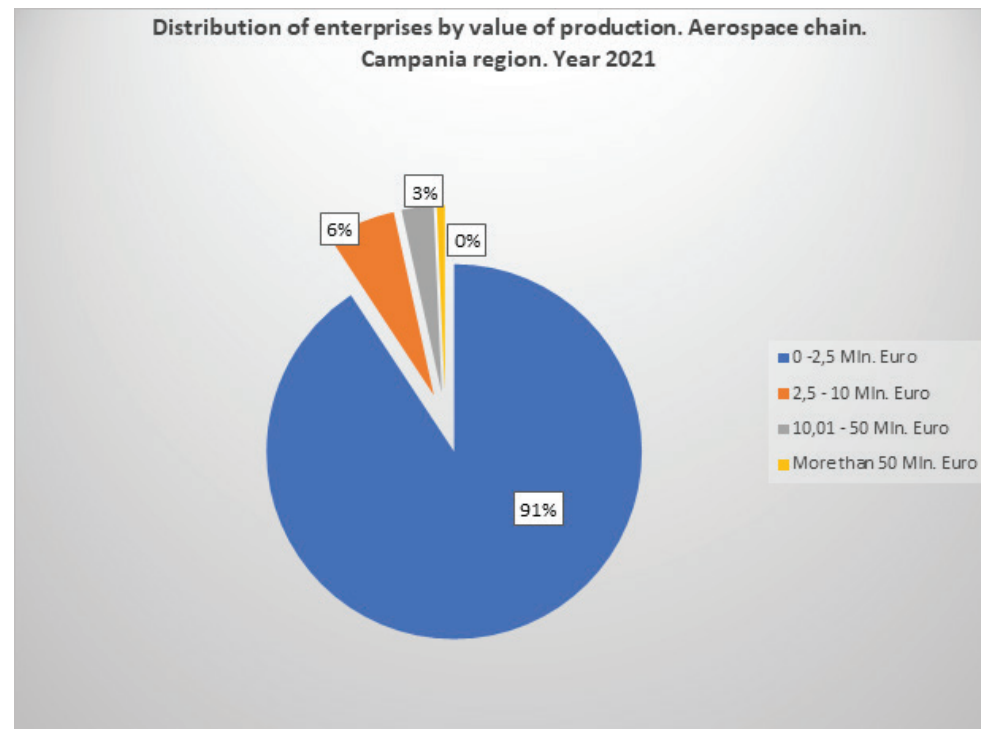


Tab. 3 - Distribution of enterprises by value of production. Aerospace chain. Campania region. Year 2021.

0 - 2,5 mln. Euro	2,5 – 10 mln. Euro	10,01-50 Mln. Euro	More than 50 mln. Euro	Total
264	17	8	2	291

Source: data Infocamere 2021

Fig. 2 - Distribution of enterprises by value of production. Aerospace chain. Campania region. Year 2021.



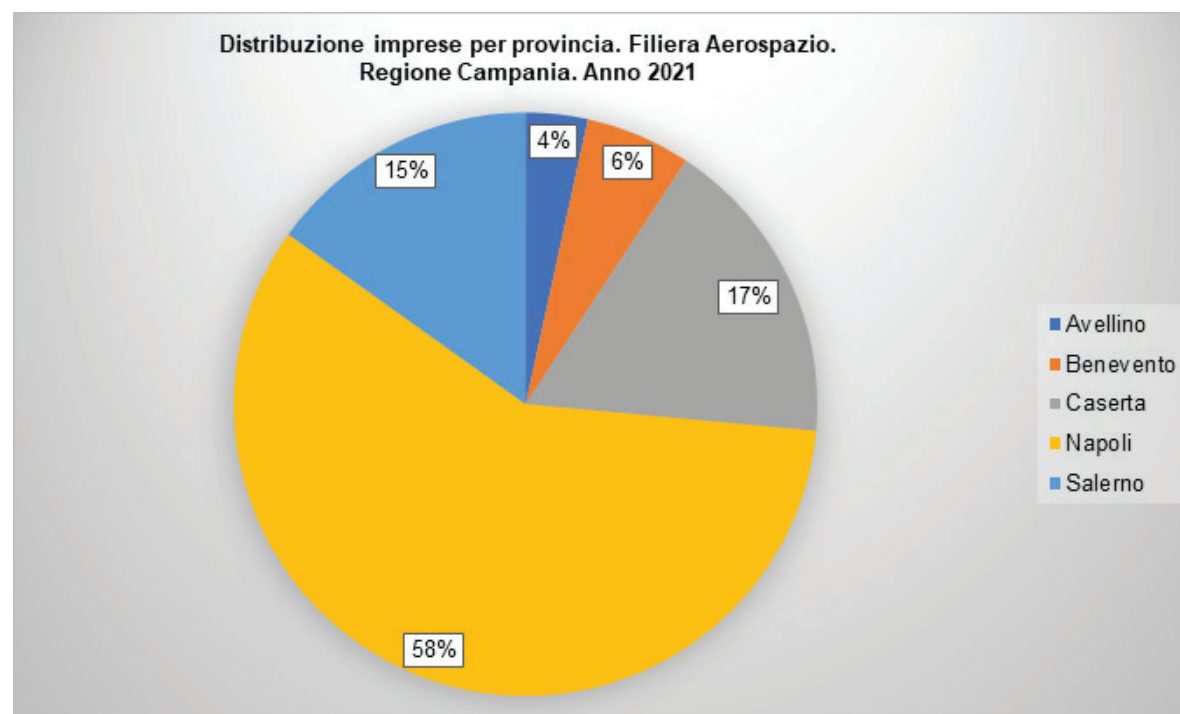
Source: data Infocamere 2021



Tab. 4 - Distribuzione imprese per provincia. Filiera aerospazio. Regione Campania. Anno 2021

Avellino	Benevento	Caserta	Napoli	Salerno	Totale
10	17	50	170	44	291

Fig. 3 - Distribuzione imprese per provincia. Filiera Aerospazio. Regione Campania. Anno 2021



Fonte: dati Infocamere 2021

In the provinces of Naples (58%), Caserta (17%) and Salerno (15%), are concentrated almost all (a total of 90%) of the companies belonging to the aerospace sector.



INCENTIVES AND FINANCING²



² "Source: incentivi.gov.it / mise.gov.it / invitalia.it - febbraio 2023"



New Sabatini Green



Subsidy made available by the Ministry of Enterprise and Made in Italy. The Target is to facilitate companies' access to credit and increase the competitiveness of the production system. It supports investments to purchase or lease machinery, equipment, plant, capital goods, as well as software and digital technologies. As of 1 January 2023, the 'Sabatini Green' programme started supporting SMEs' investments in new facilities, plant and equipment, with low environmental impact, as part of programmes aimed at improving the eco-sustainability of products and production processes.

Contributions Machinery 4.0 Ministry of Economic Development

Digital Export Bonus MAECI Ministry of Foreign Affairs and ICE Agency



Tax credit aimed at supporting and incentivising companies that invest in new tangible and intangible capital goods functional to the technological and digital transformation of production processes for production facilities located in Italy.

Non-repayable contribution aimed at supporting manufacturing micro e small enterprises in their internationalisation activities through digital solutions

Development Contracts

Facilities for large programmes (at least EUR 20 million for industrial development and environmental protection and 7.5 million euro for processing and marketing of agricultural products for the agricultural product processing sector) of strategic importance, a specific procedure, the Development Agreement, is in place, which implies a fast track for resources, a reduction in time and greater involvement of the administrations involved.

Southern Investment

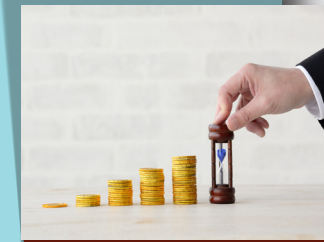


Tax credit in favour of companies that purchase new capital goods intended for production facilities located in southern regions. It is granted in the form of a tax credit ranging up to 45% of the expenditure incurred, depending on the characteristics of the enterprises concerned and the area in which the production structure is located.

Grow in the South Fund



It provides for the acquisition of shareholdings, mainly minority shareholdings, in the risk capital of small and medium-sized enterprises with registered offices and operations in the eight regions of southern Italy: Abruzzo, Basilicata, Calabria, Campania, Molise, Apulia, Sardinia and Sicily.





THE ZES - SPECIAL ECONOMIC ZONE



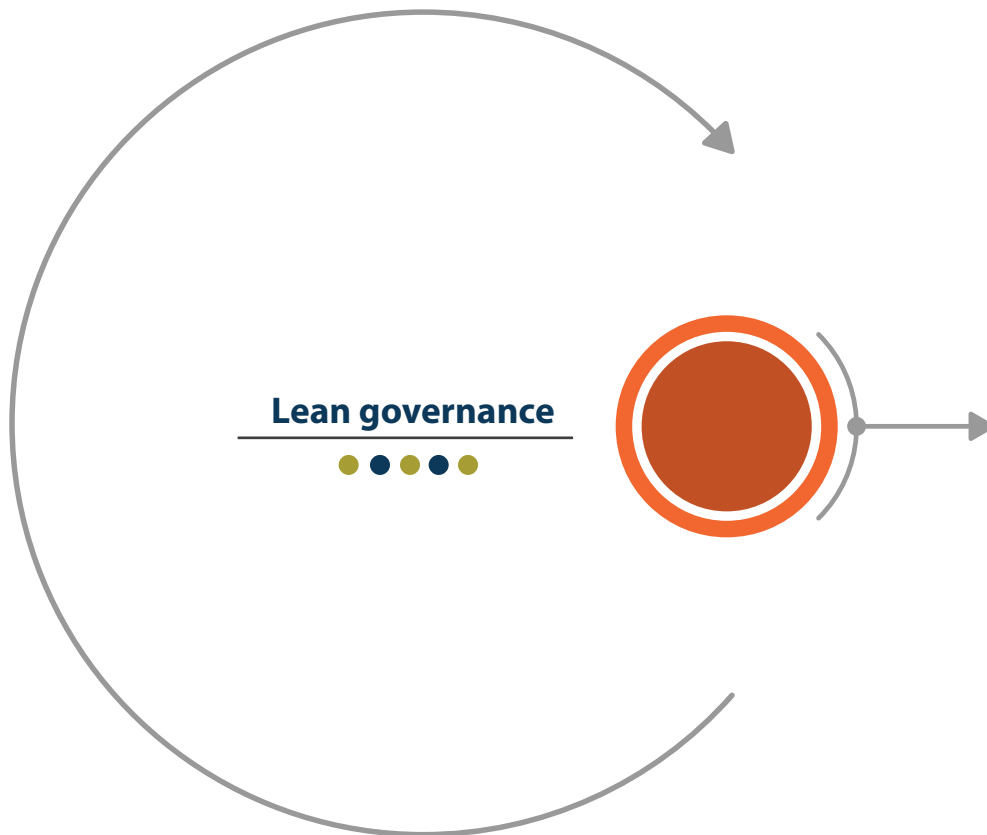
The ZES, **Campania's Special Economic Zone**, according to the Regional Strategic Plan, **covers 37 of the 550 municipalities in the region**, an area populated by **2,043,800 inhabitants** (35% of the regional population), made up of **26 'strategic' areas** where there are production facilities, ports, interports, industrial development areas (ASI), and PIP areas.





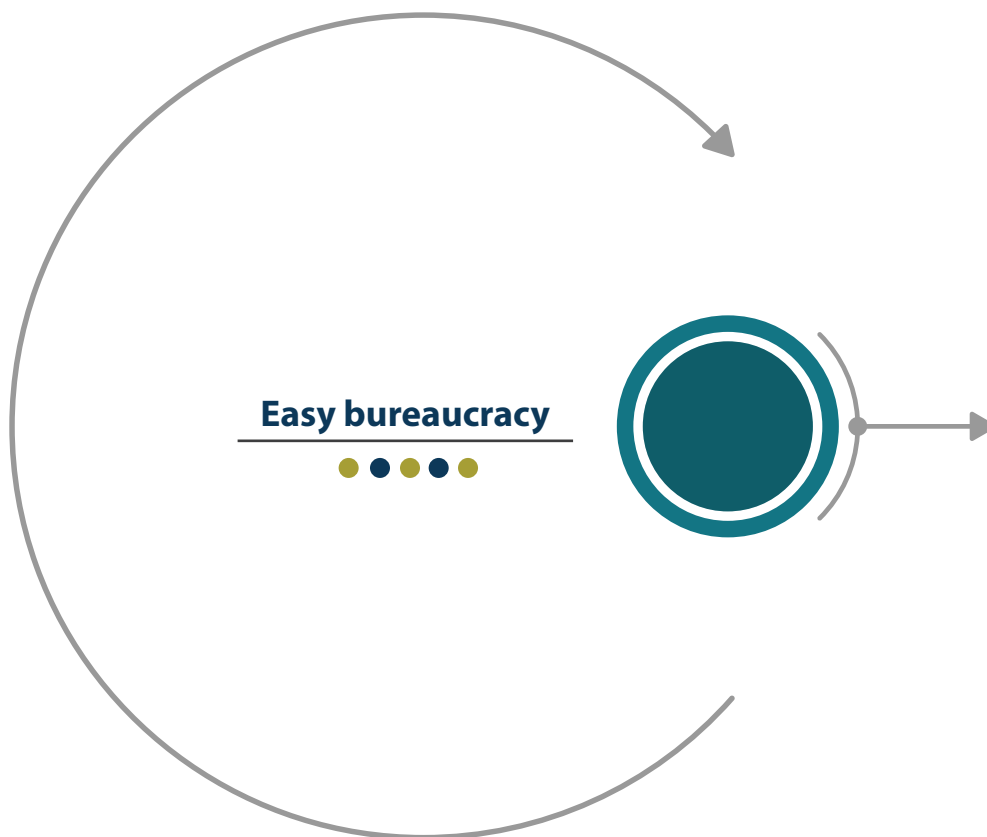
BENEFITS SETTLEMENT IN ZES





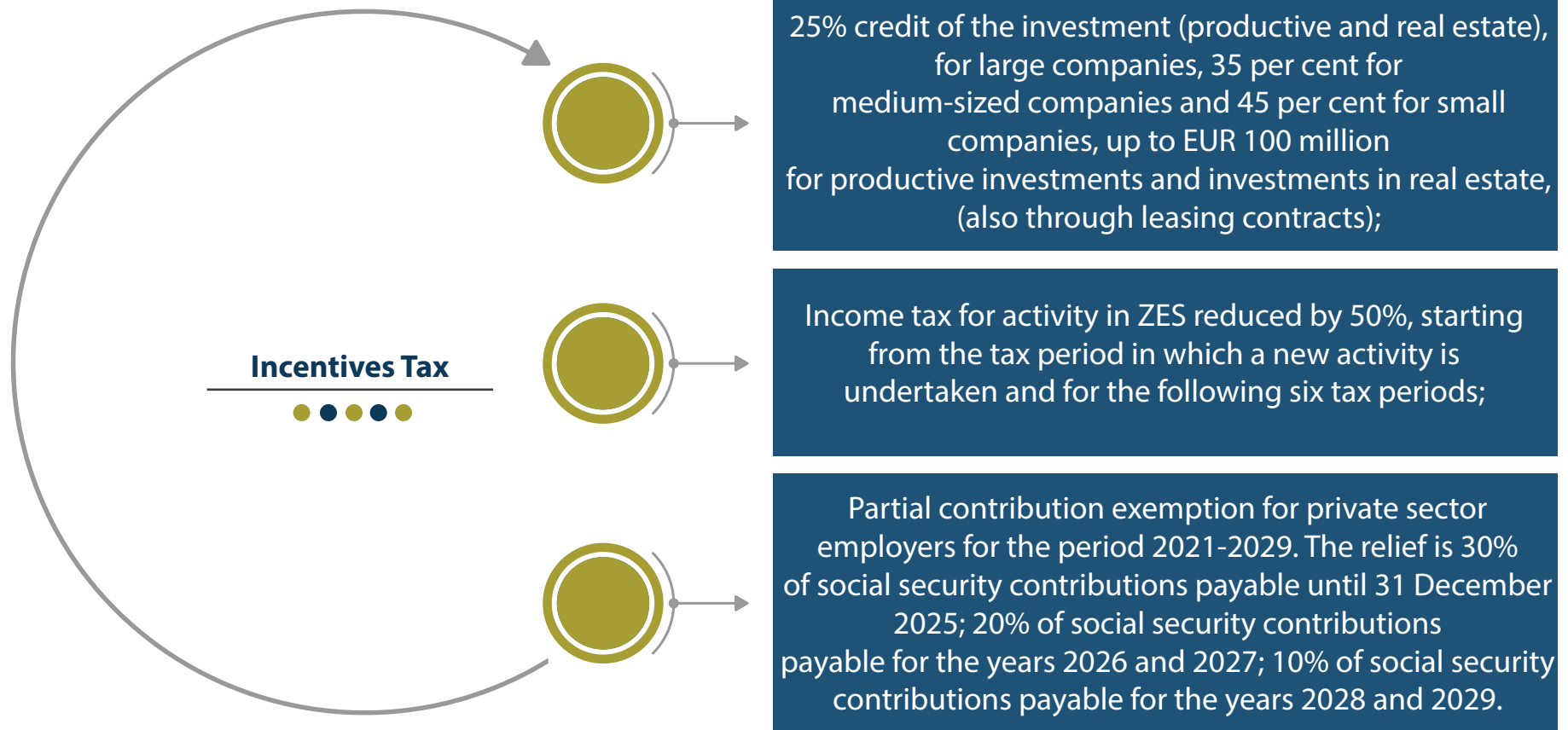
The ZES is managed by an Extraordinary Commissioner with special powers as the main interlocutor for investments.





Investment programmes enjoy a simplified and speeded-up administrative process thanks to reduced procedural deadlines, a single authorization and a dedicated desk.







IMPORT/EXPORT. AEROSPACE SUPPLY CHAIN. CAMPANIA REGION. YEAR 2021



The total value of exports 2021 of the Campania region in the aerospace sector, for the product classes listed, amounts to about **1 billion 326 million Euros**.

The product class that contributes the most, accounting for 51.5% of exports is '**Aircraft, space vehicles and relative devices**'.

This is followed by '**Parts and accessories for motor vehicles and their engines**' (15.4%) and '**General purpose machinery**' (11.7%).

Also noteworthy are '**Telecommunication equipment**' 11.1% and '**Instruments and apparatus for measuring, testing and navigation; watches and clocks**' 9.7%, while the contribution of 'Lighting equipment' is residual.

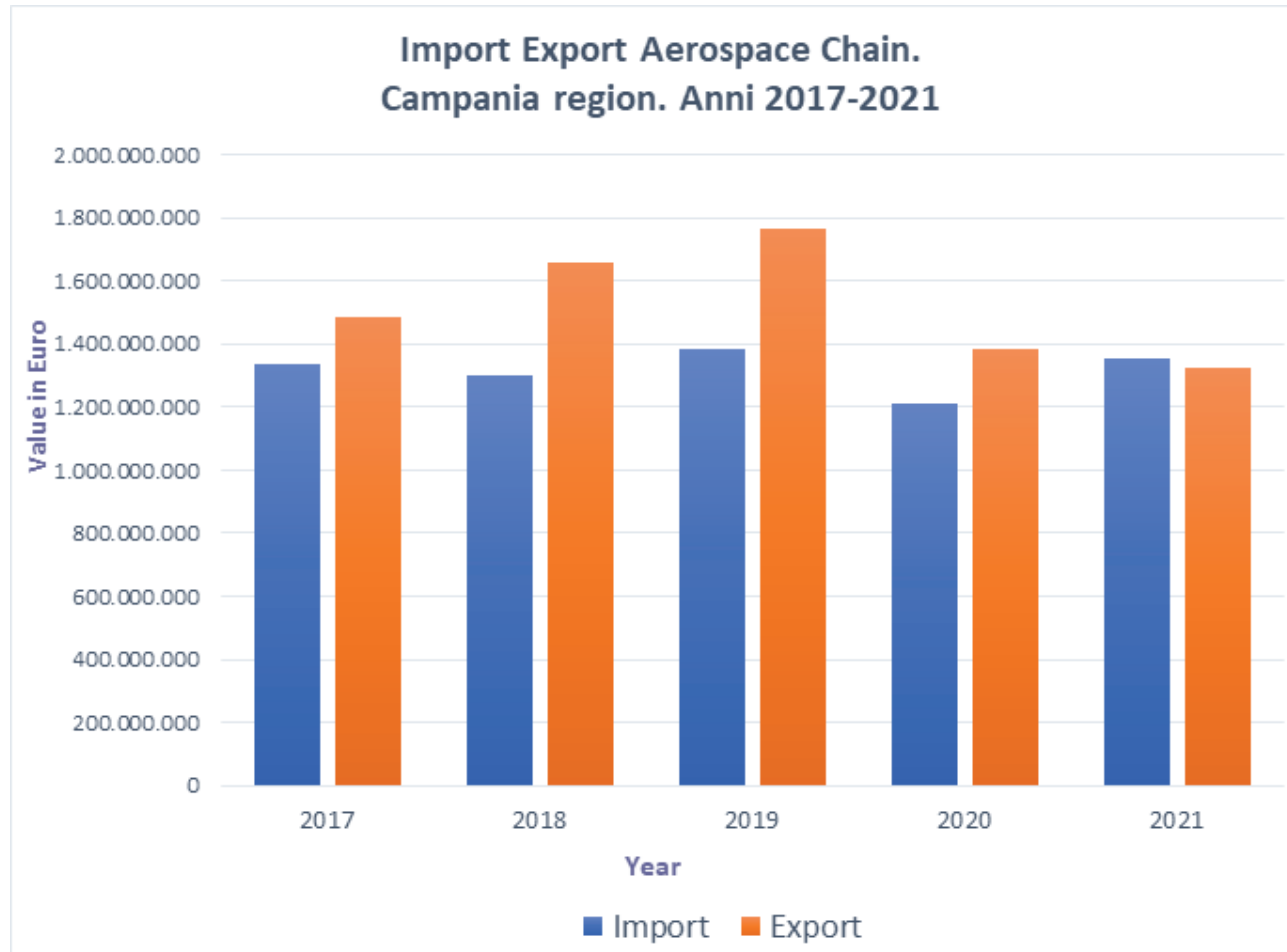
Imports came close to EUR 1.366 billion, up by around 11.7 percentage points compared to 2020.

Tab. 5 - Import-Export Value. Aerospace Chain. Campania region. Years 2017 – 2021

	IMPORT					TREND IMPORT 2020-21	EXPORT					TREND EXPORT 2020-21	BALANCE IMPORT/EXPORT 2021
	2017	2018	2019	2020	2021		2017	2018	2019	2020	2021		
TOTAL	1.336.483.203	1.302.337.645	1.384.290.797	1.213.591.456	1.355.949.940	▲	1.487.789.884	1.659.517.358	1.766.078.052	1.384.931.076	1.326.425.421	▼	-131.324.519

Source: Coeweb Istat Data Warehouse foreign trade statistics. Cumulative data 2021

Fig. 4 - Import-Export Value. Aerospace Chain. Campania region. Years 2017 – 2021



Source: Coeweb Istat Data Warehouse foreign trade statistics. Cumulative data 2021



TRAINING AND INNOVATION FOR THE AEROSPACE SECTOR IN CAMPANIA



The Campania Aerospace Technological District – DAC S.c.a r.l.

was established on May 30th, 2012 with the definite goal of stimulating the collaboration between research centers, universities and firms in the Campania region in order to foster business opportunities and continuous growth and innovation.



Currently, the Campania Aerospace District involves 195 direct and indirect partners, including 26 large companies (e.g.: Leonardo, MA Group, DEMA, GEVEN, Atitech, Telespazio, etc.), 19 Research Centers (e.g.: CNR – National Research Council, CIRA – Italian Aerospace Research Center, ENEA and the 5 Campania Universities) and 150 SMEs and other entities.

Sectoral Areas

- **Commercial Aviation**, for the development of enabling methodologies and technologies to design and build the new regional aircraft;
- **General Aviation**, for the development of manufacturing and assembly techniques of light aircraft in the Business & General Aviation (B&G Aviation);
- **Space and Carriers**, for the design and development of space platforms such as micro-satellites and dual technologies related to



carriers and systems for logistic and communications;

- **Maintenance and Transformation** – for the development of methods of maintenance and transformation useful for the new technologies and methodologies planned within the district.

DAC represents a new model of development which faces the new challenge related to competences

consolidation and integration of all regional excellence in the aerospace industry: The District participates in the main international aerospace exhibitions and events, as well as in European, national and regional projects to fund initiatives for the development and promotion of the sector.

Together with the **Universities of Naples Federico II and Parthenope, Stoà, Leonardo Technical Training, the Technical Institutes Fermi-Gadda, Barsanti and Villaggio dei Ragazzi, it has set up FACA - Fondazione Aerospazio Campania Academy**

The university education system in Campania has developed a specific offer that takes into account the specific characteristics of the region's economy with respect to the aerospace sector.

The University of Caserta 'Luigi Vanvitelli', Department of Engineering, includes among its courses, the three-year degree in **Aerospace, Mechanical, Energy and Management Engineering (which relates to the industrial sector) and the master's degree (two-year) in Aerospace Engineering**, which offer significant professional outlets: in fact, according to university statistics, three years after the master's degree, more than 80 per cent of students who graduate from the department have stable employment.

The University of Naples 'Federico II', Department of Industrial Engineering offers two three-year industry-oriented courses, one in **'Aerospace Engineering'** and one in **'Aerospace Systems Management for Defence'**.

It is also possible to obtain a **Master's Degree (two years) in 'Aerospace Engineering'**.

The 'Polotecnico Fermi - Gadda' Institute in Naples has activated diploma courses for **'Higher technician for the innovation of mechanical processes and products. Mechanical process for automotive and aerospace'**. **'Higher technician for the innovation of mechatronic processes and products. Automation of production systems for automotive and aerospace'**.



● Università
● degli Studi
della Campania
Luigi Vanvitelli



UNIVERSITÀ DEGLI STUDI DI NAPOLI
FEDERICO II





LEADING COMPANIES IN THE CAMPANIA REGION



ALA Advanced Logistics for Aerospace a distributor and supplier of advanced logistics and supply chain services for the aerospace industry.

ATITECH deals with the maintenance and painting of short and medium-haul aircraft, the company is now able to offer maintenance support to commercial and military aircraft

DEMA - Design Manufacturing SpA specialises in Tier 1 supply in the aeronautical supply chain. It acts as an integrator between large international customers and the network of qualified SMEs, through an offer of complex aeronautical structures.

I.D.I.S. Ingegneria dei Sistemi offers high-tech integrated engineering services for the aerospace industry. The IDS Naples laboratory develops firmware and processing software for the company's radar systems.

LEONARDO S.p.A. operates in four sectors: Helicopters, Aeronautics, Defence and Security Electronics, Space. It is the tenth largest defence company in the world and the third largest in Europe.

MAGNAGHI AERONAUTICA specialises in the design, production, sale and service of high value-added aeronautical components, in particular landing gear and aerostructures made with new composite materials.

TELESPAZIO joint venture born from the union of two major European partners - Leonardo (67%) and Thales (33%) - is one of the world's leading players in the field of integrated satellite solutions and services.