

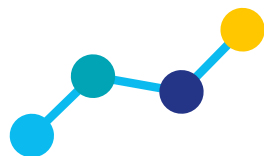


**NORTHERN
IRELAND
FACTS &
FIGURES**

2023

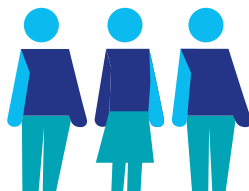
THE AEROSPACE, DEFENCE, SECURITY AND SPACE SECTORS MAKE A MAJOR CONTRIBUTION TO NORTHERN IRELAND'S PROSPERITY.

In 2022 ADS sectors' contribution to the economy in Northern Ireland was:



£0.9BN

VALUE ADDED



9^K

DIRECT EMPLOYEES



500+

APPRENTICES

£1.9BN

TURNOVER



The output per worker of the four sectors that ADS represents is estimated to be

£**100**K in Northern Ireland which is

54% more than the whole UK economy productivity value

1 IN **3**

Aircraft seats are manufactured in Northern Ireland

£**60**

MOD spend per person living in Northern Ireland

£**109**M

MOD spend in Northern Ireland in 2021/22

Northern Ireland is home to the award-winning A220 all composite wing



ADS NORTHERN IRELAND POLICY PRIORITIES

FROM TECHNOLOGY AND EXPORTS TO APPRENTICESHIPS AND INVESTMENT, ADS SECTORS ARE VITAL TO NORTHERN IRELAND'S GROWTH.



GROWING AEROSPACE, DEFENCE, SECURITY & SPACE SECTORS

On track to achieve a target revenue of £2bn per year by 2024, Northern Ireland's aerospace, defence, security and space sectors are highly prosperous, with an estimate of £1.9bn revenue in 2022.

Aerospace

Northern Ireland aerospace expertise is world renowned. The challenge is to accelerate growth in areas of strength such as aerostructures, nacelles, aircraft interiors and new opportunities in advanced air mobility and net zero aviation.

Defence

Northern Ireland develops and exports next-generation defence capabilities and equipment and has been recognised internationally for its support of Ukraine. In the coming years, there is the opportunity to grow the defence engineering supply chain with increased regional MOD spend.

Security & Resilience

The security and resilience sector has a very strong reputation with specialist capabilities that have been developed and deployed in recent years. Working with academia, and with support from government there are significant growth opportunities in the cyber security sector in Northern Ireland.

Space

Northern Ireland will host the UK Space Conference in 2023, which builds on the growing space sector including working on the Luna Pathfinder mission.

THE NORTHERN
PARTNERING
STRATEGY WAS L
WITH 10-YEAR GRO

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2

SKILLS DEVELOPMENT

9,000 people are estimated to be directly employed across ADS sectors in Northern Ireland, a shortfall of the 12,000 target which is reflective of the ongoing skills and workforce shortages. To secure long-term advantage, there must be a collaborative effort across the UK to promote the diverse, high-skill and high wage jobs available.



3

SUPPLY CHAIN EXCELLENCE

Northern Ireland companies demonstrate consistent supply chain excellence with 70% of all UK SC21 Gold Awards held by ADS members in Northern Ireland. The SC21 framework increases productivity, efficiency, and effectiveness, essential for small and medium organisations to win global business.



4

DRIVING INNOVATION

Northern Ireland can be at the forefront of UK innovation through the identification of future regulatory needs, and supporting supply chain investment in new technologies. There is a need to simplify the process for SMEs to invest in R&D.



5

EXPORT GROWTH PROMOTION

ADS works with Invest Northern Ireland (Invest NI) and the Department for Business and Trade to promote joint participation in industry events, trade missions, and international trade shows where organisations can promote their goods and services to an international markets with export opportunities.

NORTHERN IRELAND
FOR GROWTH
LAUNCHED IN 2014
GROWTH AMBITIONS.

DELIVER ON THESE
ARE WESTMINSTER
GOVERNMENT TO WORK
WITH INDUSTRY.

Northern Ireland has a legacy of innovation, which dates back more than 100 years.

The following case studies are a snapshot of ADS member activity in Northern Ireland

SPIRIT AEROSYSTEMS, BELFAST

With a rich legacy in engineering and advanced manufacturing, Spirit AeroSystems, Belfast is the largest aerospace company in Northern Ireland, supporting thousands of jobs across the UK supply chain. It has a highly skilled workforce of over 3,500, and is one of the region's largest investors and exporters. The initial investment of over £520 million in the operation's A220 advanced composite wing programme represented the largest ever single inward investment to Northern Ireland.

The company's capabilities include the development, design, manufacture, assembly and testing of major aerostructures, including fully integrated wings, fuselages and engine nacelles, as well as provision of MRO services and a growing defence business. Spirit's extensive advanced composites expertise is also being exploited for application to defence and space platforms, and sustainable mobility solutions, such as eVTOL.

THALES, NORTHERN IRELAND

Thales in Belfast is the leading high technology company in Northern Ireland, with a 60-year heritage in world-class engineering, employing over 700 people in the defence and space sectors and supporting further employment and prosperity through the local supply chain.

Belfast has developed into a global centre of excellence for Thales' air defence and surface attack solutions. This includes the UK's response to the conflict in Ukraine, with complex weapons systems and supporting equipment.

Belfast is also the site of Thales' global Space Propulsion Integration Centre, born through the support of Government and Invest NI. The centre will provide the propulsion system for all Thales large satellites globally. The next step is to establish a Thales Skills Academy in Belfast to support the aims and ambitions of Thales in NI.

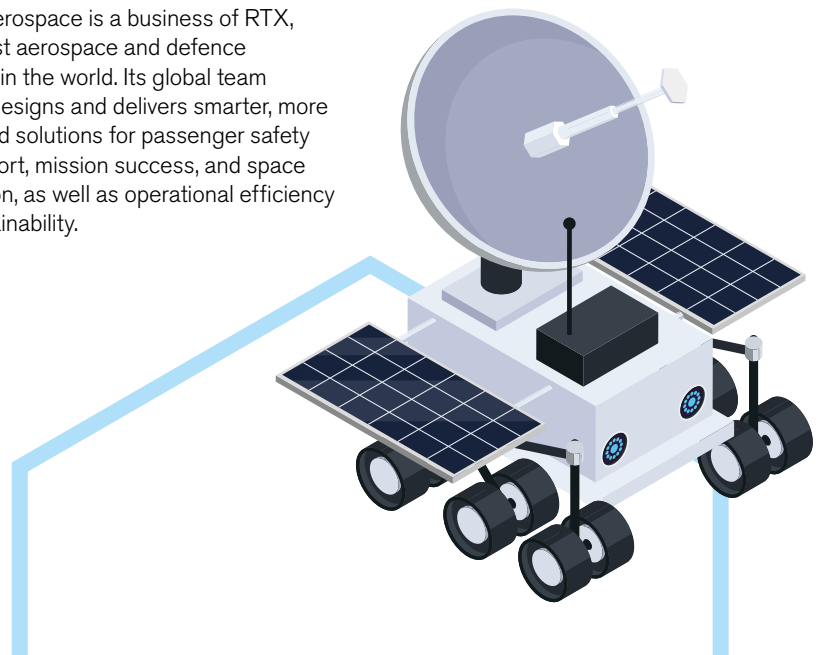
COLLINS AEROSPACE, KILKEEL

Collins Aerospace in Kilkeel manufactures innovative aircraft interior seating solutions for global airlines, producing seating across the entire aircraft cabin, from main cabin to premium economy, business class and first class. With more than 800 employees, Kilkeel is not only the largest seating manufacturing facility in all of Collins, but one of the largest in the world, producing approximately 25% of all aircraft seating for commercial aircraft.

Collins Aerospace is a business of RTX, the largest aerospace and defence company in the world. Its global team dreams, designs and delivers smarter, more connected solutions for passenger safety and comfort, mission success, and space exploration, as well as operational efficiency and sustainability.

THOMPSON AERO SEATING

Founded more than twenty years ago, and based in Portadown, Thompson Aero Seating designs and builds premium aircraft seating for the world's leading airlines including Delta, Singapore Airlines and Qantas. Renowned for its market leading, cutting-edge designs, Thompson employs more than 650 people, with significant expansion plans in place. These include a new Dynamic Test Facility in Banbridge; Northern Ireland's first such facility, due to open in late 2023. The expanding and evolving range of premium aircraft-seating products, are all based upon intelligent design to maximise passengers' comfort and personal space, while optimising every inch of the cabin which ensures a very bright future for Thompson.



HARLAND & WOLFF, BELFAST

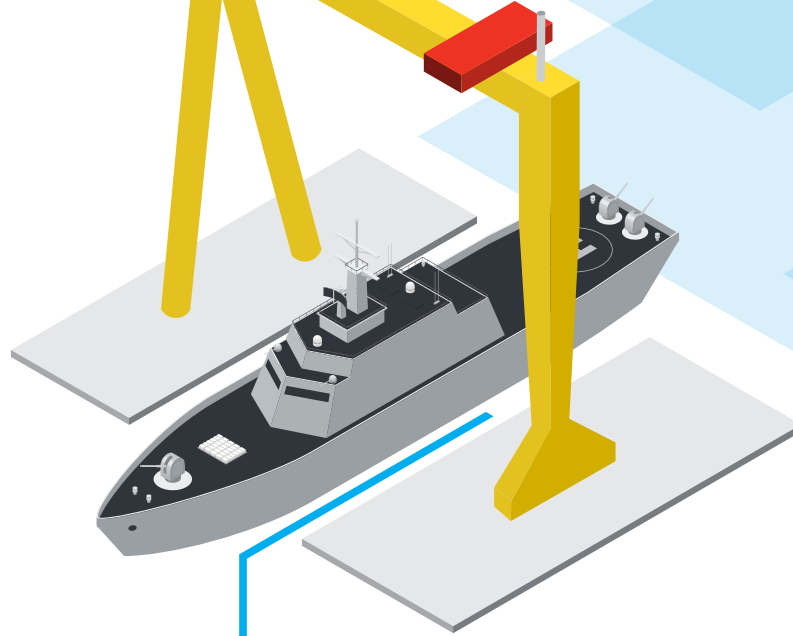
Founded in 1861, Harland & Wolff have one of the most iconic sites in Belfast, with two yellow gantry cranes as permanent features of the yard, called 'Samson' and 'Goliath'. Harland & Wolff operate one of the largest drydocks in Europe, and are one of only three shipyards in the UK large enough to undertake complex defence projects. Additionally, Harland & Wolff also has a separate dock for ship repair and pre-delivery final inspection. A recent notable ship in the dock was HMS Albion (an amphibious warfare ship).

In 2023, Harland & Wolff were part of a winning consortium bid, Team Resolute, to manufacture the three Fleet Support Ships. These will provide munitions, stores, and provisions to the Royal Navy's aircraft carriers, destroyers, and frigates deployed at sea. This £1.6 billion contract is expected to create 900 new jobs at the Belfast site, which is pledged to be the final assembly site for the new ships. It includes £77 million of infrastructure at Harland & Wolff's Belfast and Appledore shipyards, and a further £21 million in skills and technology transfer from Navantia UK.

MOYOLA PRECISION ENGINEERING

Founded in 1976 and still in the same family ownership, while growing its global competitiveness, Moyola Precision Engineering based in Northern Ireland is a supplier of complex detail parts and sub-assemblies, supplying defence and civil aerospace primes and tier 1's such as BAE Systems, Saab, MBDA and Spirit AeroSystems.

Moyola has participated in the SC21 program since 2008 and in 2023 hopes to achieve the SC21 Gold Award for the sixth year running. Since 2016, Moyola has invested £16 million, adding capacity



and capability to support the future growth of industry. During the pandemic, Moyola invested £2.5 million in a brand-new Non-Destructive Testing and surface treatment facility to protect rate and maintain global competitiveness.

DENROY

Established in 1972 in Bangor, Denroy is the world's leading innovator in the design and manufacture of engineered polymer components and solutions, with a specialism for aerospace and defence components accounting for around 30% of total group sales.

Denroy employs approximately 100 people, and its customers in our sectors include Spirit AeroSystems, Airbus, Bombardier, Thales, Chemring and others. Denroy's sales in the sector have doubled in the past five years and they expect this will increase by 50% in the next three to four years. Denroy has held the SC21 Gold Award accreditation for the past five years and are recognised for business excellence in the wider supply chain.

KINSETSU





Female founded, Belfast-based SME, Kinsetsu is an intelligent tracking and locations solutions provider. It has very recently joined the defence sector, delivering personnel and accounting technology to the Royal Navy's Aircraft carriers. Through DASA funding, Kinsetsu has developed a platform to locate personnel, providing a view of all souls on board, as well as visitors.

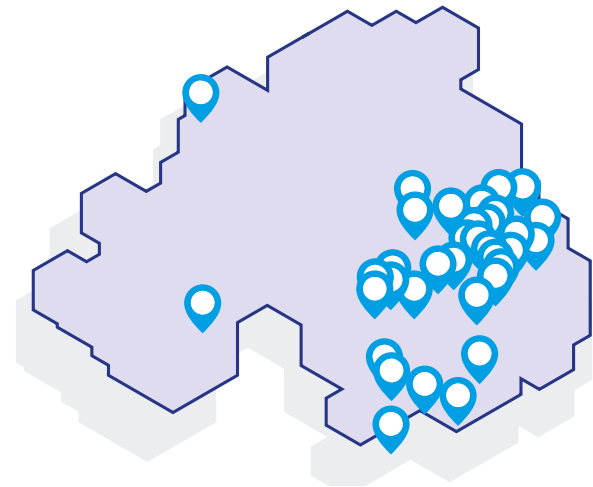
Their innovation was trialled on HMS Bristol, and later Queen Elizabeth-class aircraft carriers, HMS Prince of Wales and HMS Queen Elizabeth. Kinsetsu is continuing to grow in the defence sector, collaborating with organisations in the UK, Europe and North America. DASA funding and support were instrumental in these efforts. The sector now accounts for 45 per cent of annual revenue and has enabled their team to increase to 26 and expand their defence presence in Ottawa, Canada.

THE STRENGTH OF OUR SECTORS



ADS is the UK trade association advancing leadership in aerospace, defence, security and space, to enable prosperity and clean, secure growth for our nation.

	DIRECT EMPLOYEES BY SECTOR IN NORTHERN IRELAND:	BUSINESS TURNOVER BY SECTOR IN NORTHERN IRELAND:
AEROSPACE 	6,500	£1.6bn
DEFENCE 	<1,000	£200m
SECURITY 	3,250	£500m
SPACE 	<500	<£100m



 INDICATES THE LOCATION OF AN ADS MEMBER

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ADS Northern Ireland Facts and Figures 2023 uses data estimates from ADS own sources, data from the Office of National Statistics and Government publications.

Aerospace is assumed to be 68% civil and 32% defence

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