Industry Facts & Figures

2019 / A guide to the UK’s aerospace, defence, security & space sectors
Major contribution to UK jobs, skills, exports & growth

Supporting 1,000,000 jobs across the country, our sectors offer global growth opportunities and are vital to the UK’s future as a high-tech, high-skill, high-wage economy.

In 2018 the UK aerospace, defence, security and space sectors’ contribution to the UK was:

- **£44bn** Exports
- **£30bn** Value Added
- **£78bn** Turnover
- **374k** Direct jobs
- **12k** Apprentices

In 2018 figures are estimates.

Government and industry

Investing in UK growth, ambition and opportunity

1. **Build on the successful partnership** between the government and industry in driving an industrial strategy that attracts investment and supports growth

2. **Promote supply chain competitiveness** by focusing on productivity improvement, export support and developing world-class skills

3. **Invest in long-term innovation** to secure the economic benefits from new technology and meet the challenges of the future

4. **Focus on public procurement** which drives UK prosperity and enhances our national security

5. **Establish a close relationship with the EU** that supports our integrated European industry and sustains the UK’s global competitiveness

Our 1,000+ members, including more than 950 SMEs, span the length and breadth of the UK.
Together the UK's aerospace, defence, security and space companies generate well-paid jobs, high-tech exports and sustainable growth in every region and nation of the country.

Space regional employment taken from Size and Health of UK Space 2018 by London Economics.
Regional data is not available for the security sector. Employment data does not include Republic of Ireland.
The UK’s aerospace sector is world-leading, generating well-paid jobs, high-tech exports and sustainable growth across the country.

The AGP brings together industry and government to work in partnership to attract global investment to the UK.

Delivering an Aerospace Sector Deal with up to £125m in government funding for the UK to become a world-leader in electric and autonomous flight.

Supply chain programmes have helped 330 companies boost their competitiveness to world-class levels.

Over 200 companies across the UK have benefited from almost £1.95bn in R&D investment through the Aerospace Technology Institute.

Delivering new technologies and UK growth

- Average annual earnings of £43,000, 45% higher than the UK average
- Each new generation of aircraft is on average 20% more fuel efficient
- 90% of aerospace jobs are located outside of London and the South East
- 95% of aerospace output is for export

Aerospace is assumed to be 75% civil and 25% defence.
The UK is the second largest defence exporter in the world, which helps deliver the equipment and services our armed forces and security services need to safeguard national security.

Industry and government are working in partnership, through the DGP, to deliver security, growth and prosperity for our nation. With the purpose of improving productivity and competitiveness, as well as growing the UK’s global market share through exports, the DGP has delivered innovative capabilities and strong international partnerships.

Industry is working with government to support SMEs in every corner of the UK by launching the ‘Improvement Framework’ across the defence supply chain.

The UK remains the second largest global defence exporter, with the UK holding an estimated 12% of the global market share (2017).

Average annual earnings of £35,000, 18% higher than the UK average.

£2bn of funding for the UK’s future Combat Air capability, including the inspirational Tempest programme.

65% of defence jobs are located outside London and the South East.

Turnover

£22.7bn

6% Turnover growth since 2010

Direct employees

135k

Turnover growth 2017

Export orders

£9bn

Apprentices

4.4k

Adsgroup.org.uk/facts2019

Defence Growth Partnership (DGP)
The UK’s security and resilience sector provides solutions to the challenges we all face today, from cyber security to products and services which address the threats of terrorism and all other aspects of national security.

**Security and Resilience Growth Partnership (SRGP)**

The SRGP brings together industry, academia and government to demonstrate the UK’s security expertise and capabilities. The SRGP has supported the development of the forthcoming UK Security Export Strategy and reinforced the world-leading status of the sector, moving the UK upwards from fifth to fourth largest security exporter. The sector develops and supplies capabilities that protect the UK and its citizens, through services designed to cut crime, prevent terrorism, and protect the UK’s cyber-sphere.

**Delivering security at home, abroad and online**

- Protecting 385,000 fans who attend Premier League matches every week with innovative high footfall screening technologies.
- Securing the UK’s digital infrastructure with more than 800 cyber security companies in the UK.
- Keeping UK residents safe on 71.9m visits abroad in 2018 by exporting advanced aviation security technologies to global airports.
- Providing security expertise to international major events, such as the 2020 Tokyo Olympics.

**Key Figures**

- **£13.3 bn** Turnover
- **142%** Turnover growth since 2010
- **114k** Direct employees
- **3k** Apprentices
- **£5.2 bn** Exports

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The UK’s space sector is at the cutting edge of exploring the universe and connecting people to the world around them.

- The UK’s space sector is at the forefront of developing technologies and fostering innovation and growth.
- Accelerating growth year on year, the UK is a world leader in nano, small satellites and with the ambition to achieve 10 per cent of the global space economy by 2020.
- Rocketing to the future, Sutherland in Scotland will be providing the UK’s first vertical launch spaceport.
- Industry and government are working together to develop the UK’s first National Space Programme.

Delivering innovation and the technologies of tomorrow:

- 40% of all small satellites currently in orbit were manufactured in the UK.
- Commercial vertical and horizontal launch demand is worth a potential £3.8bn to the UK economy over the next decade.
- All of the UK’s regions and nations are home to headquarters of space organisations.
- The UK space sector spent over half a billion pounds in 2016/17 on R&D.

UK Space sector

- 42K Direct employees
- 60% Turnover growth since 2010
- 1.5K Apprentices

Space Growth Partnership (SGP)

- £14.8bn Turnover
- £15bn Exports
- 60% Turnover growth since 2010
- £5.5bn Exports

Space data from Size and Health of UK Space 2018 by London Economics.
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ADS is the UK trade organisation representing the aerospace, defence, security and space sectors. ADS is focused on representing the interests of these valuable wealth producing industries in the UK and overseas to key stakeholders, government and the media. Farnborough International Limited, which runs the Farnborough International Airshow, is a wholly owned subsidiary.