



Industry Forum

Business Excellence Through Inspired People

February 2012

Flying Forward - the aerospace industry's vital role in the UK economy

The ADS, which is the premier trade organisation for all companies operating in the Aerospace, Defence, Security and Space sectors, has just launched a major campaign - Flying Forward. The campaign was launched on 17 January in the Strangers' Dining Room in the House of Commons. Business Minister, Mark Prisk, delivered the key note speech. Emma Reynolds MP, Chair of the newly established All Party Parliamentary Group Aerospace also spoke in support of the campaign.



Flying Forward stresses that UK's aerospace industry is a major national asset, crucial to the country's economic future. It sets a target of retaining the UK's existing 17% global market share over the next two decades. This would mean that the UK aerospace industry would be worth an estimated £352 billion by 2029. The global aerospace market is predicted to increase significantly in the coming decades and to achieve the targeted growth over that timescale the aerospace industry needs to work in a much closer partnership with the UK Government and work together as an industry to greater effect.

The UK aerospace sector starts from a position of strength. It is number one in Europe and the largest aerospace industry outside the United States. Turnover in 2010 was £23.1 billion. New orders are worth £29.1 billion with 70% of industry revenues come from exports. The UK's maintenance, repair and overhaul business has a 17% market share of a \$45 billion per year global industry. The UK is a world leader in the manufacture of aircraft wings and engines with a 35% market share in the engine sector.

One key to securing the future is the emerging markets, particularly India, China, Brazil and the Middle East. Another is to make further progress in meeting the environmental challenge. Aircraft today already produce 70% less carbon dioxide emissions compared to the equivalent from 50 years ago and 75% less noise nuisance than the equivalent from 30 years ago. The Airbus A380 burns 17% less fuel per seat and produces around 10% less NOx than the previous largest aircraft model. It burns 3 litres of fuel per 100 passenger kilometres - as fuel-efficient as any car currently on the market.



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The European aerospace industry has set itself targets to reduce CO2 emissions by 50% per passenger km, oxides of nitrogen by 80% and noise by 50% in new aircraft compared to their 2000 equivalents all by 2020. In 2050 the aims are:

- To have technologies and procedures available to allow a 75% reduction in CO2 emissions per passenger km and a 90% reduction in NOx emissions. The perceived noise emissions of an aircraft in flight should be reduced by 65%. These are relative to a typical new aircraft in 2000.
- Aircraft movements should be emission free when taxiing
- Aircraft should be designed and manufactured to be recyclable
- Europe should be the centre of excellence on sustainable alternative fuels, including those for aviation, based on a strong European energy policy



ADS have concluded that the UK needs to position itself properly to win a substantial amount of this new business and safeguard the long-term sustainability of the industry. In particular it is important to secure major UK involvement on new aircraft replacement programmes, such as the A320 and 737 replacements, wings, engines and high-value systems. To achieve this there must be:

- A strong industry-Government partnership
- A technology plan in place with demonstrators
- Sustainable infrastructure and facilities

Europe must address three key challenges: increasing the level of technology investment, enhancing its

competitiveness in world air transport markets and accelerating the pace of policy integration.

Industry Forum has substantial experience of working with aerospace firms including the analysis of current and future supply chains and the development and delivery of comprehensive improvement plans. We look forward to working with UK aerospace in the future to deliver the goals of the Flying Forward campaign.

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(Taken from the ADS publication Flying Forward - <http://www.adsgroup.org.uk/articles/27855>)



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