

## > CIVIL AVIATION

With app. 65%, civil aviation still accounts for the largest share of sales and employment in the national aerospace industry. Compared to the previous year, this sector could increase its sales by 3.2% to a volume of Euro 16.1 billion. The number of employees remained at the previous year's level of 62,200. Workload fluctuations led to the fact that there were hardly any increases in permanent staff.

After negative records in terms of passenger demand and freight business were broken as recently as 2009 according to the Air Transport Association IATA, the civil aviation industry profited from a global recovery of air traffic and the resulting new orders by numerous airlines in 2010.

As the largest client in the civil aviation sector, Airbus was able to increase its deliveries for the ninth time in a row to 510 aircraft, twelve more than in 2009. Airbus could claim a total of 644 new orders in 2010. At the end of 2010, the backlog of orders for commercial aircraft at Airbus amounted to a total of 3,552 aircraft valued at more than \$ 480 billion US at list prices, which is the equivalent of six years of full production.

The helicopter manufacturer Eurocopter could also post an increase in sales despite a weak civilian market. In the last year, the company's revenues rose by 6% to Euro 4.8 billion.

A total of 527 helicopters were delivered in 2010 and 346 orders valued at Euro 4.3 billion were booked.

## > EQUIPMENT AND MATERIALS

However, the positive development of the system manufacturers did not fully spread to the suppliers. Due to delays in the delivery of the A380 and a slump in production at the manufacturers of smaller regional aircraft and business jets, parts of the equipment and materials industry were not able to profit from market developments in 2010 to the same extent as the systems manufacturers.

## > SPACEFLIGHT

In 2010, the space industry once more proved to be a very stable business segment. The German aerospace companies primarily profited from getting new orders in the fields of Earth observation, communication and navigation. This sector of the industry was able to increase its sales by 6.7% to about 2.1 billion Euros, which accounts for 8.5% of sales in the entire industry.

The employment rate rose by 8.1%, above average compared to the previous year. All in all, about 6,700 people were working in the space industry in 2010. The German space industry gave an impressive demonstration of its technological capabilities within the scope of numerous programs: for example, the German technology employed in the Automated Transfer Vehicle (ATV) as well as the vehicle's laser-supported rendezvous and docking system, which is unique in the world. Ariane5, TanDEM-X, Cryosat 2, SAR-Lupe or SatComBw are further examples of programs, in which German space technology was used successfully in 2010.

## > DEFENSE

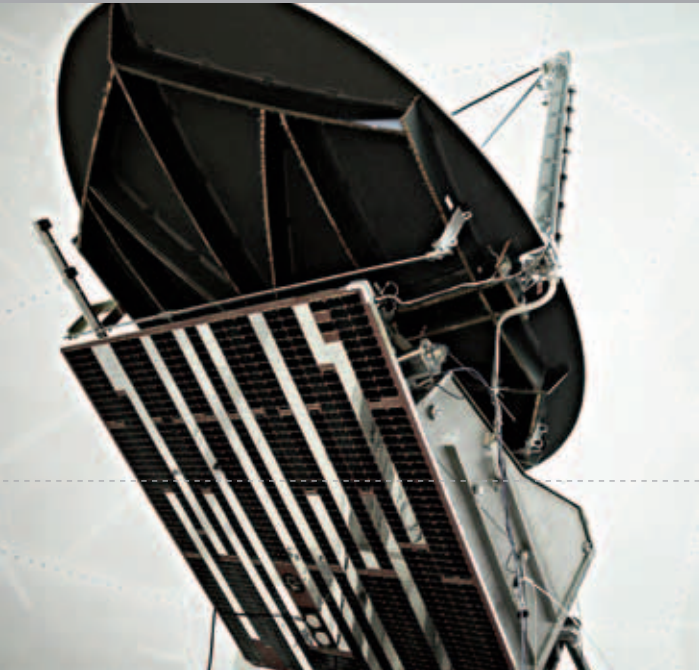
The aerospace defense industry was able to increase its sales by 7.2% to a volume of Euro 6.5 billion. This segment accounted for about a quarter (26.2%) of total industry sales in 2010, which at the same time makes it the largest of the three German defense segments. About 22,600 people were employed in this segment in 2010, which corresponds to a growth in employment of 6.3% compared to the previous year. This positive development is due as much to a stable workload situation at the final assembly lines and increased deliveries in the Eurofighter, NH90 and Tiger programs as it is to one-off effects for that year and the success of individual businesses in the export sector, such as the sales of Cassidian. Still, this positive result cannot hide the fact that the Bundeswehr reform, budget reductions and a temporary stop in commissions already had grave consequences for some BDLI members in 2010.



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## KEY FIGURES OF THE GERMAN AEROSPACE INDUSTRY 2010



## > THE GERMAN AEROSPACE INDUSTRY 2010

- > Industry growing in all sectors and continuing to create jobs
- > Excellent prospects for civil aviation and aerospace industry
- > Good results in military aviation masking risk of future job cuts and loss of technological competence in Germany

The German aerospace industry, whose prospects at the beginning of 2010 were rather modest in the wake of the last global financial crisis, could report growth in all sectors over the last year. The overall industry grew by 4.5% and reached a new record with total sales of Euro 24.7 billion (previous year: Euro 23.6 billion). In 2010, the number of people employed in the industry showed a slight increase of 1.8% and now stands at app. 95,400. The German aerospace industry therefore remains a strong driving force for innovation and jobs.

With 17% of total industry sales, investments in research and development remained at the high level of previous years in 2010. Last year the share of exports – in terms of total industry sales – amounted to 68% and therefore was still as high as in 2009.

Despite the good result overall, the industry sectors must be rated differently.

In 2010, the civil aviation sector was able to record growth again due to a recovery of the market and increasing numbers of orders and deliveries. With numerous successful programs, the aerospace industry also showed strong growth in 2010. The German aerospace industry started off 2011 with good prospects in both sectors.

In 2010, the situation of the equipment, materials and component manufacturers within the aviation industry was not quite as positive. They could not yet profit from the positive market development in the civil aviation sector to the same extent as system manufacturers. Manufacturers of aircraft engines were able to partially offset losses in the military market through the positive climate in the civil aviation market.

The problem child of the industry turned out to be the aerospace defense sector. In 2010, good results, some of them due to one-off effects, masked the risk of an impending loss of viability of this sector. Without long-term concepts for the development, procurement and use of flying weapons systems for the Bundeswehr, Germany faces the risk of permanently losing its technological competence and highly-qualified jobs.

BDLI



> THE BDLI

The German Aerospace Industries Association (Bundesverband der Deutschen Luft- und Raumfahrtindustrie e.V. – BDLI) and its more than 190 members represent the interests of an industrial sector, which owing to international technology leadership and worldwide success has become a significant driver of economic growth in Germany. Combining almost all strategic key technologies, the German aerospace industry achieves a turnover of currently 24.7 billion Euros with a directly employed labor force of around 95,400.

Communication with political institutions, authorities, associations and foreign representations in Germany is a major task of the BDLI. The association also offers its members a variety of services in Germany and abroad. The BDLI is responsible for organizing the ILA Berlin Air Show International Aerospace Exhibition.

The BDLI is officially accredited to the German Bundestag where it performs specific, legally embodied tasks. It is a member of the European umbrella organization ASD, Aerospace and Defence Industries Association of Europe, and the Federation of German Industries (Bundesverband der Deutschen Industrie – BDI).

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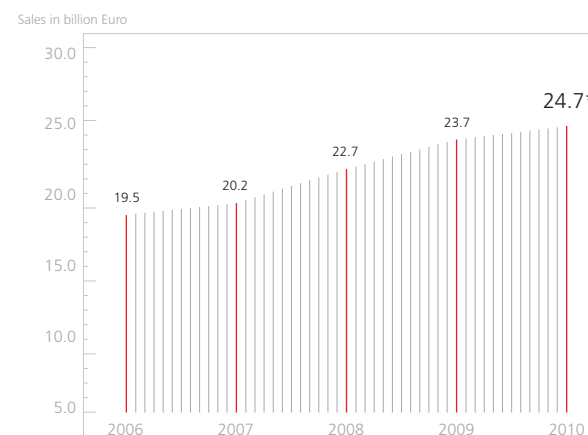
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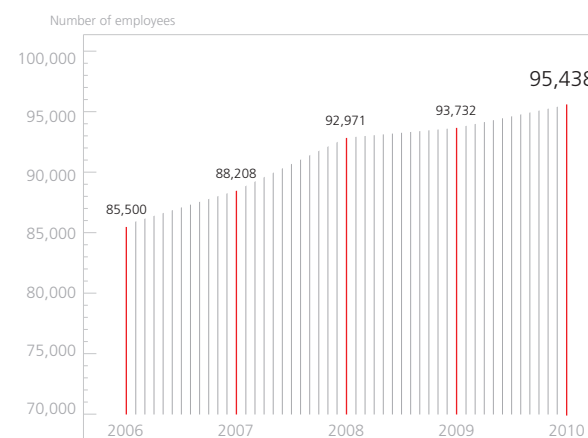
> OVERALL SALES DEVELOPMENT

5-year comparison of sales in the German aerospace industry



> OVERALL EMPLOYMENT DEVELOPMENT

5-year comparison of employment figures in the German aerospace industry



\* The BDLI comprises about 90% of the German aerospace industry (incl. estimate for German aerospace businesses not organized in the BDLI).

> SALES OF THE GERMAN AEROSPACE INDUSTRY BY MANUFACTURER GROUP (IN MILLION EURO)

	Aerospace systems (MG 1)**	Engines (MG 2)**	Equipment (MG 3)**	Material technologies and components (MG 4)**	Total	Change over previous year				
1982	4,344.9	67%	653.8	10%	1,271.2	19%	239.9	4%	6,509.9	+10.5%
1983	4,496.3	67%	652.9	10%	1,323.1	20%	242.7	3%	6,714.9	+3.2%
1984	4,588.3	67%	658.8	10%	1,453.2	21%	165.2	2%	6,865.8	+2.3%
1985	6,261.0	68%	659.9	7%	1,888.1	20%	493.8	5%	9,302.6	+35.5%
1986	6,162.6	58%	674.2	6%	3,532.6	33%	272.2	3%	10,641.6	+14.4%
1987	5,970.5	56%	703.8	6%	3,719.1	35%	281.8	3%	10,675.2	+0.3%
1988	6,850.4	58%	788.4	6%	3,885.6	33%	343.7	3%	11,867.6	+11.2%
1989	7,313.2	58%	956.5	8%	3,940.6	31%	379.8	3%	12,590.0	+6.1%
1990	7,780.7	60%	1,049.8	8%	3,695.5	29%	446.5	3%	12,972.5	+3.0%
1991	8,671.5	64%	996.5	7%	3,592.6	26%	425.8	3%	13,686.4	+5.5%
1992	7,089.2	63%	1,027.8	9%	2,799.0	25%	307.9	3%	11,223.9	-18.0%
1993	6,206.7	65%	807.7	9%	2,301.0	24%	209.6	2%	9,525.3	-15.1%
1994	5,653.6	66%	788.9	9%	1,991.5	23%	159.5	2%	8,594.7	-9.8%
1995	4,750.6	60%	989.3	13%	1,916.4	24%	195.6	3%	7,851.8	-8.6%
1996	4,741.6	60%	1,086.0	14%	1,896.3	24%	188.2	2%	8,656.2	+11.0%
1997	6,045.6	61%	1,523.8	15%	2,123.2	22%	239.5	2%	10,861.4*	+25.5%
1998	6,648.3	60%	1,764.5	16%	2,395.4	21%	339.5	3%	12,190.6*	+12.2%
1999	6,679.3	56%	2,075.5	17%	2,884.5	24%	356.0	3%	13,117.5*	+7.6%
2000	7,778.1	58%	2,156.3	16%	3,157.6	23%	435.7	3%	14,796.5*	+12.8%
2001	8,742.1	58%	2,769.5	18%	3,148.4	21%	480.0	3%	16,557.3*	+11.9%
2002	8,242.8	59%	2,163.8	16%	3,133.0	22%	430.9	3%	15,282.4*	-7.7%
2003	8,724.6	61%	1,896.8	13%	3,198.2	22%	452.1	3%	15,700.0*	+2.2%
2004	8,789.2	61%	2,070.2	14%	3,219.7	22%	462.2	3%	15,998.0*	+1.9%
2005	11,707.0	63%	2,415.7	13%	3,716.4	20%	557.5	3%	18,582.0*	+16.2%
2006	12,277.7	63%	2,533.5	13%	3,702.8	19%	779.5	4%	19,488.4*	+5.1%
2007	12,562.7	62%	2,767.3	14%	4,135.1	20%	767.8	4%	20,233.0*	+3.8%
2008	13,613.3	60%	2,985.8	13%	5,300.4	23%	841.8	4%	22,741.4*	+12.4%
2009	13,974.2	59%	2,915.6	13%	6,045.2	27%	722.4	3%	23,657.4*	+4.0%
2010	14,940.0	60%	2,984.9	12%	6,066.0	25%	728.9	3%	24,719.8*	+4.5%

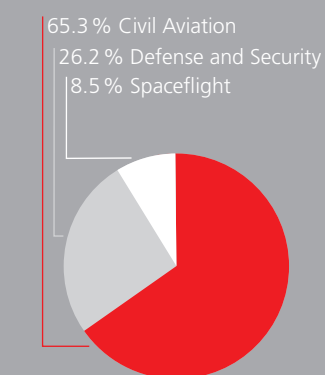
\* incl. estimate for German aerospace businesses not organized in the BDLI  
\*\* Manufacturer Group

> NUMBER OF EMPLOYEES WORKING IN THE GERMAN AEROSPACE INDUSTRY BY MANUFACTURER GROUP

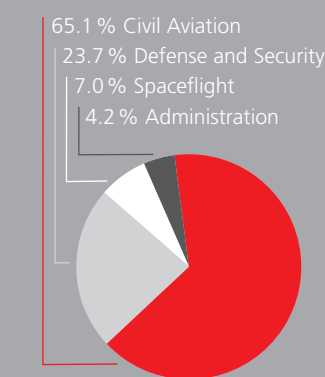
	Aerospace systems (MG 1)**	Engines (MG 2)**	Equipment (MG 3)**	Material technologies and components (MG 4)**	Total	Change over previous year				
1982	47,133	64%	8,462	12%	15,007	21%	2,585	3%	73,187	-2.8%
1983	45,501	64%	8,362	12%	15,464	21%	2,145	3%	71,472	-2.3%
1984	47,125	66%	7,666	11%	14,376	20%	1,956	3%	71,123	-0.5%
1985	47,115	59%	7,336	9%	22,747	29%	2,634	3%	79,832	+12.2%
1986	49,002	58%	7,728	9%	25,793	30%	2,498	3%	85,021	+6.5%
1987	48,468	56%	8,035	9%	27,200	32%	2,870	3%	86,573	+1.8%
1988	49,940	53%	8,257	9%	32,262	35%	3,102	3%	93,561	+8.1%
1989	52,802	56%	8,288	9%	30,036	32%	3,330	3%	94,456	+1.0%
1990	56,004	59%	9,253	10%	26,378	28%	3,407	3%	95,042	+0.6%
1991	51,523	60%	8,687	10%	22,681	26%	3,408	4%	86,299	-9.2%
1992	49,272	63%	7,962	10%	18,608	24%	2,659	3%	78,501	-9.0%
1993	47,016	64%	7,441	10%	15,788	22%	2,650	4%	72,895	-7.2%
1994	42,977	63%	7,596	11%	15,926	24%	1,466	2%	67,965	-6.8%
1995	37,035	59%	8,361	13%	16,441	26%	1,498	2%	63,335	-6.8%
1996	35,196	58%	8,157	13%	15,957	26%	1,912	3%	61,222	-3.3%
1997	36,441	57%	7,645	12%	15,762	29%	1,264	2%	61,112*	-0.2%
1998	37,934	57%	7,986	12%	19,300	29%	1,331	2%	66,550*	+8.9%
1999	38,931	57%	8,196	12%	19,807	29%	1,336	2%	68,300*	+2.6%
2000	41,595	59%	8,460	12%	19,035	27%	1,410	2%	70,500*	+3.2%
2001	43,247	59%	8,796	12%	19,058	26%	2,199	3%	73,300*	+3.9%
2002	42,775	59%	8,700	12%	18,850	26%	2,175	3%	72,500*	-1.1%
2003	44,160	60%	8,096	11%	19,136	26%	2,208	3%	73,600*	+1.5%
2004	44,940	60%	8,239	11%	19,474	26%	2,247	3%	74,900*	+1.8%
2005	49,593	61%	8,130	10%	20,325	25%	3,252	4%	81,300*	+8.6%
2006	52,155	61%	8,550	10%	22,230	26%	2,565	3%	85,500*	+5.1%
2007	53,133	60%	8,571	10%	23,503	27%	3,001	3%	88,208*	+3.2%
2008	55,346	60%	8,852	10%	25,720	27%	3,053	3%	92,971*	+5.4%
2009	51,589	55%	10,121	11%	29,206	31%	2,816	3%	93,732*	+0.8%
2010	51,680	54%	10,910	11%	30,132	32%	2,716	3%	95,438*	+1.8%

\* incl. estimate for German aerospace businesses not organized in the BDLI (estimate incl. agency workers)  
\*\* Manufacturer Group

> SALES BY SECTOR IN PERCENT 2010



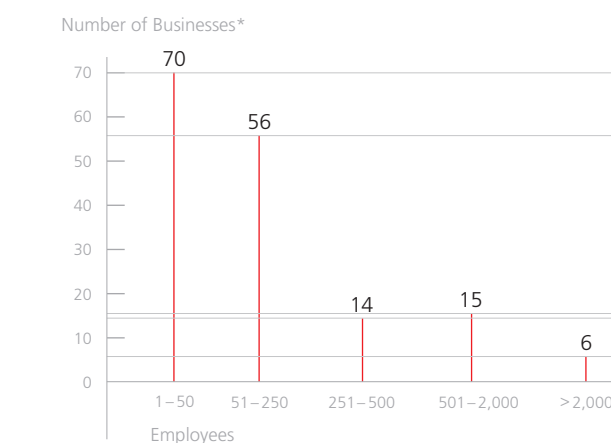
> EMPLOYEES BY SECTOR IN PERCENT 2010



> SALES AND NUMBER OF EMPLOYEES BY SIZE OF BUSINESS

Number of Employees	Sales (million Euro)	Sales (% of total)	Employees (number)	Employees (% of total)
1-50	462.38	1.87	1,626	1.70
51-250	2,101.36	8.50	7,350	7.70
251-500	1,953.21	7.90	7,924	8.30
501-2,000	3,667.49	14.84	19,253	20.18
>2,000	16,535.36	66.89	59,285	62.12
Total	24,719.80	100.00	95,438	100.00

> BDLI MEMBER BUSINESSES BY SIZE



\* full members