



Ministero dello Sviluppo Economico



ITALIAN TRADE COMMISSION
DELEGATION COMMERCIALE D'ITALIE



 **AEROMART**
Montréal 2015

Framework of the Italian aircraft and spacecraft sector

The Italian aerospace industry continues to play a leading role in the Italian economy, and to stand out as one of the few high-tech industries that can produce innovations capable of generating positive ripple effects in other national industrial sectors.

Today, the Italian aerospace industry ranks fourth in Europe, seventh in the world and its projection is global. It should however be emphasized that since the early 2000s the industry has achieved an international profile through acquisitions and the commercial success of innovative products that allow the total control of a volume of industrial activity around 18 billion euros. With regard to the activities carried out in factories located in Italy, which are dominant, revenues rose to 13 billion euros, with a total work force of 64,000 employees, including more than 52,000 in the fields of aeronautics and space. The substantial investment in R & D, accounting for 15% of turnover, achieved certain objectives in terms of growth and stimulated technological innovations and spill-over effects in other technology-intensive industrial areas, such as nanotechnology, new materials, microelectronics, defense, communications and electronics.

Among the Italian regions active in the sector, it is possible to identify seven areas of excellence that reflect many technological districts, characterized not only by the presence of large groups, but also for the integrated system made up of SMEs, owners of high-technology value and innovative research centers and universities in Lombardy, Piedmont, Emilia Romagna, Lazio, Umbria, Campania and Puglia.

Other centers of excellence in the sector are located in Liguria, Trentino, Veneto, Tuscany, Marche, Molise, Basilicata, Sicilia and Sardinia. The supply structure consists of a few large companies, by size and integrated systemic capacity, and more than a hundred small and medium-sized enterprises operating in the supply chain and in some cases even as international "firsts". The large companies operate synergistically with SMEs via regional and interregional districts.



Promotional Strategy

The ICE Promotional Program Initiatives aim to provide an overall system image, which is representative of all areas of excellence and all the players in the sector.

The promotional activities are planned for the Italian aerospace industry on the basis of strategic guidelines laid down in consultation with the Ministry of Economic Development, the Ministry of Foreign Affairs and with the Ministry of Defense, which participates in the main event as a testimonial of the quality and reliability of new technologies developed by the industry and trade associations, the AIAD Federation (130 federated) – even through the Focal Point established at ICE in 2013 – the AIPAS (50 members) and ASAS (about 40 members).

In addition, the program takes into account submissions by the network of representatives of local bodies (Regions, Chambers of Commerce), the Italian cluster for aerospace technology (CTNA) and research centers (ASI, CNR, ENEA, Science & Technological Parks, public and private research centers).

The primary objective of the intervention is to increase the promotional weight of the domestic industry in the international context.

In the current context of fierce competition, the strategy is to develop the Italian presence in the most interesting emerging markets such as the BRICS and consolidate the Italian position in the most advanced markets such as the USA, Canada, United Kingdom, France and Germany.

ASSOCIATIONS



AIAD Italian Industries Federation for Aerospace, Defence and Security

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AIAD is the Italian Industries Federation for Aerospace, Defence and Security. It includes almost all the national enterprises that operate with advanced technology in the design, production, research and services activities for the civil and military aerospace, military navy and army sectors along with all the related electronic systems connected to these sectors. As representative of the Italian Industry, it is a member of the equivalent European Association (ASD). AIAD maintains strong relationships with national, international or NATO related institutions in order to promote represent and guarantee the interests of all its industries. AIAD provides a significant contribution to the development of the sector's plans that will be developed by the Defence

bodies and/or other Government Administrations that deal with research or innovation, procedure, technical and contract guidelines. It is also a promoter member of the Italian Cluster for Aerospace Technology - CTNA. The Federation coordinates a variety of work groups in national and international sectors, it promotes the organization of seminars and congresses events and it collects statistical reports on the performance of the main economic indicators. Furthermore AIAD is the actor of the intensive promotional activities abroad, both to coordinate the Italian participations to the most important international events and to organize and direct not only the mission of our enterprises abroad but also the visits of foreign delegations in Italy.

ASSOCIATIONS



ASAS Association for Space-based Applications and Services

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ASAS is an Italian industrial association promoting the development of the Space Sector. ASAS is member of Confindustria (Confederazione Generale dell'Industria Italiana, i.e. the Italian largest organization representing the manufacturing and services companies in Italy) through two industrial Federations: AIAD (Associazione Industrie Aerospazio e Difesa) and Confindustria Servizi Innovativi e Tecnologici. Space-based Services and Applications exploiting the Space infrastructures for terrestrial purposes are key connections to the market and a basic elements for the growth of the whole Space sector business. ASAS main goal is to

promote the use of Space based Services and Applications, transferring "from Space to Earth" technological innovation in "Space Economy" domains such as Communications & ICT, Risk Mitigation and Emergencies Management, Land/Sea Environment Monitoring and Protection, Security, Cultural Heritage, Human Exploration and Science. ASAS members are Large, Medium and Small Enterprises, main players and leaders in Downstream Services related with Satellite Navigation & Localization, Earth Observation, Satellite Telecommunications and Space Integrated Applications.

COMPANIES



A. ABETE SRL

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A. ABETE srl is an international reference in the design and manufacturing of components and assemblies for aircraft engine and structural parts.

The company works in the field of precision machining in the following areas: Aero structures, Engines, Defense, Aeronautical Equipment.

COMPANIES



AVIOCHEM SRL

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Aviochem is a 1951 founded aerospace agent and stockist. Our company is specialized in dealing with chemicals and we are daily involved in development,

qualification and application; we added recently to our know-how what is necessary to develop with our customer's tailor-made supply chain solutions.



BRETON SPA

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Breton, established in Italy in 1963, manufactures High Quality 5 axes High Speed Machining Centers and employs about 700 people. Breton developed a full range of machining centers (5 axes milling and turning/milling) for the manufacturing

of titanium, steel, aluminium and composite materials for the following Industrial sectors: Aerospace, Defence, Aeronautics, Automotive, Naval, Gears, Energy, Mould and Die.

CO.ME.AR. SRL

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Co.Me.Ar. has been operating in the aerospace field since 30 years and it is partner of the leading companies in the aerospace industry. Thanks to its production layout with 43 latest generation CNC, highly skilled technicians and sophisticated CAD/CAM software, Co.Me.Ar. is specialized

in machining of high precision and complex mechanical components, and it is able to provide its customers with the operations of TURNING, MILLING, DRILLING, SUPERFINISHING, on any typology of material, starting from bars, tubes, mergers or forgings.

COMPANIES



DEMA-DESIGN FACTORING SPA

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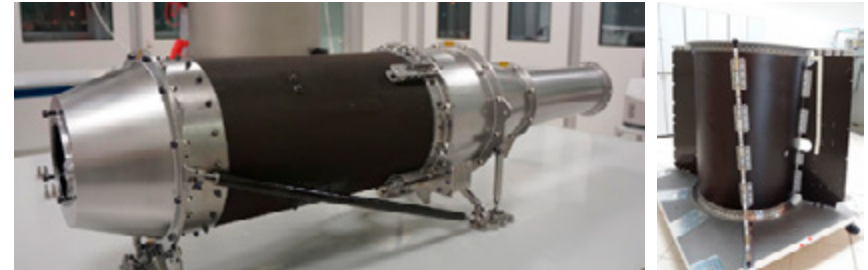
Dema's mission is to be aerostructures World-Class Supplier, to create Added Value integrating Design, Industrialization and Manufacturing, and to be the Partner to Share the Challenges. Among the main aerostructures produced: sections of aircraft fuselage, pax floor, cockpit, tail cone, fan cowl, ramp, cargo doors, slide box, horizontal stabilizer, helicopters fuselages, helicopter tail boom, and helicopter rear fuselage.

COMPANIES



DTM SRL

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DTM since 1994 offers competitive "turnkey" solutions in the design (CAD, structural, thermal, CFD) manufacture and testing of mechanical systems for ISS, satellites, launchers and Space vehicles. DTM is specialised in the design and qualification of composite mechanical systems and we are also involved in

the automotive and biomedical fields. Facilities include CAD and FEM software, autoclave, tools, acquisition devices, testing equipments for static and dynamic tests, thermal vacuum chamber, ISO5 clean room. DTM quality management system is EN 9100 (AS 9100) certified.



E-LEVEL COMMUNICATION SRL

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Since 1996, E-Level Communication supplies the international aviation market with E-learning & Computer Based Training, LMS & standalone SCORM Player (BirdEye), Tech Pubs, Maintenance Management and Execution Aids (SmartMaintenance). Our

main drivers are very high reliability and quality standards, which allow us to include as our main customers Pilatus and Alenia Aermacchi, ones of the best worldwide aircraft manufacturers.



FUCINE UMBRE SRL

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Antonio Alunni – Managing Director



Manufacturing of closed die forging, pre-machined and finished parts for the aerospace market. Fucine Umbre is able to produce vertically integrated components ready to be used in the assembly line. Capabilities: comakership design, dies and tooling manufacturing, heat treatments, machining, non destructive tests, shot peening, painting, galvanic and laboratory tests. Approvals: UNIEN9100:2009, special processes NADCAP accreditation.



LAER SRL

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LAER is a private company operating in the aeronautical field since 1989. It offers a totally verticalized product. The company is able to manage all phases of a project, industrialization, production and assembly of complex aeronautical structures. The core business is mainly represented by large assemblies, as well as metal laminated or machined parts and, starting from 2009, fiber composites

manufacturing. The implemented processes are supported by Technical Departments, such as Engineering, Quality and R&D, with competences on design and advanced manufacturing and control techniques. LAER produces a wide range of aero structures including aircraft fuselage sections, precision machined parts, randoms, flaps, ailerons, etc.

LMA SRL

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LMA is your preferred Partner in Precision Mechanical Machining and Assembly. Small, medium and large parts up to 6000x3000x1500mm (236x118x59"), are daily milled, turned and assembled in the Company. A Sheet Metal Forming activity and a NADCAP approved Heat Treatments Facility complete the in-house services offered by LMA.

LMA manufactures parts and assy using the following materials: Al alloys (2000, 5000, 6000 & 7000 Families), Ti alloys, PH steels, Inox, Inconel, Cu-Be, Mg alloys and others, exclusively to Aerospace Industry

Standards, using the most advanced technologies available on the Market. LMA uses 3,4 and 5 -axis milling and turning machines, including Ultra High Speed FMS multi-pallet (18 pallet), special hardware and test benches to produce parts for the most prestigious Aerospace programmes worldwide.

LMA does its own engineering, NC programs, CMM controls, assembly and sub-assembly and manages its proper supply chain as Tier 1 of most of its international Customers on the main Military and Civil Aerospace Programmes.



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Manufacturing and assembly of components and sub-assembly for aerospace industry and verticalized

management of customer orders. Design and manufacturing of tools for machining of mechanical parts.



Micra is a company with 35 employees certified EN9100 since February 2014. We are specialized in high precision mechanical parts as per customer's drawing in different materials like titanium and Aluminum. In the aerospace field we supply structural and interior parts also

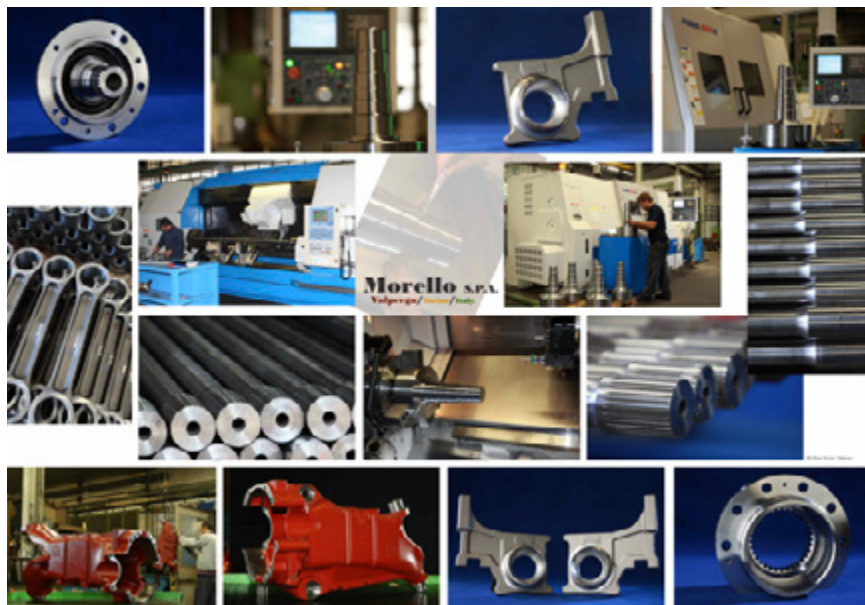
assembled with bushing and bearing installation. We export 85% of our products to customer in all the Europe and our business in the Aerospace sector is around 25% of our turnover. Actually we are involved in different programs like : C919, Legacy, Global, C-Series and E2



Stampaggio
e lavorazioni meccaniche
MORELLO spa

MORELLO SPA

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MORELLO produce hot forging parts from more than 50 years. We are specialized in security parts, like torsion bars, levers, traction rod, transmission gear, engine gear. Quality is our focus Satisfaction customer needs is our goal.



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Design, development and manufacturing of hydraulic and electromechanical equipment for actuation systems, including distribution and control of commercial and military aircraft and helicopters. Products supplied : Landing gears actuators and valves, rotor and wheel braking systems, hydraulic power systems, thrust reverser systems.

Design, development and manufacturing of aerostructures made of machined and sheet metal parts and integration with actuation and locking systems. Products supplied : Cargo and passengers door, Thrust reversers, fuselage sections. Maintenance repair and overhaul Products serviced : Own OEM products, APU, Gear Boxes, Light Aircraft.



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O.V.S. VILLELLA has been founded in 1975 by its actual Manager Pino Villella as an aeronautical welding company with a staff of more than 150 employees, our main areas activities are: Manufacturer of aerospace structures, sheet metal, welding (NADCAP Approved), piping & ducting, Machining till 9 Axes, NDI (MT-PT-RT NADCAP Approved), surface treatments & maintenance according to PART-145.

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Umbria Aerospace Companies is an association founded in November 2008 with the support of Confindustria Umbria. Today in UAC are 27 companies associated, with 2900 aggregate employees and an amount of sales of 480 Million €. The associated companies have a variety of skills: from the production services, to

the components manufacturing, to get the supply of avionics subsystems. The following Institutions are own supporting members under a common working agreement: Perugia University, the Italian Region of Umbria, the Italian Trade Agency, Umbria Trade Agency.



UMBRA CUSCINETTI SPA

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Umbra designs and manufactures ballscrews and high precision components for aerospace applications. Umbra supports 18 global aircraft manufacturers and over 60 programs. Umbra production includes ballscrews, acme screws, safety rods, precision shafts and gears that serve as the mechanical heart of electro-mechanical systems powering primary and secondary

flight control surfaces, and high lift systems in commercial and military aerospace today. The key to Umbra's success is its constant and substantial investment in research and development, coupled with its ongoing manufacturing and process improvements. UmbraGroup continues to lead the way in the global aerospace linear motion sector.



ITALIAN TRADE COMMISSION
DELEGATION COMMERCIALE D'ITALIE

The ICE-Italian Trade Agency is the government organisation which promotes the internationalisation of the Italian companies, in line with the strategies of the Ministry for Economic Development. ICE provides information, support and advice to Italian and foreign companies.

In addition to its Rome headquarters, ICE operates worldwide from a large network of Trade Promotion Offices linked to Italian embassies and consulates and working closely with local authorities and businesses.

ICE provides a wide range of services overseas helping Italian and foreign businesses to connect with each other:

- identification of possible business partners
- bilateral trade meetings with Italian companies
- trade delegation visits to Italy
- official participation in local fairs and exhibitions
- forums and seminars with Italian experts

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