



SAN DIEGO'S AEROSPACE INDUSTRY

Aerospace has a long history in San Diego, dating back to the early 1900s when Ryan Airlines built the Spirit of St. Louis and Reuben Fleet brought Consolidated Aircraft Corporation to Lindbergh Field. Since then, San Diego's aerospace industry has been an integral part of the region's – and the world's – innovation and defense economies.

Home to some of the world's largest aerospace, aircraft, and research and development companies, San Diego is a North American aerospace hub. San Diego is also part of a much larger aerospace ecosystem that includes robust operations throughout Southern California. Southern California's aerospace industry employs more than 85,000 people, and in 2014, the industry's output totaled \$39.9 billion.¹ Tacking on to the Southern California success, Baja California, Mexico is one of the world's leading aerospace manufacturing hubs – home to Honeywell, Cobham and Eaton, to name a few.

HIGHLIGHTS

- » **World-changing technology:** Since the first solo-nonstop transatlantic crossing in 1927 developed by Ryan Air, the San Diego aerospace industry remains a hub of world-changing technology.
- » **Job growth:** From 2004-2014, San Diego's aerospace industry has seen nearly a 67 percent growth in employment, driven in large part by unmanned systems technology.¹
- » **New wave:** California's aerospace industry is evolving to include a new wave of innovators pushing the envelope in new space, commercial satellites, unmanned systems and rockets. New competition is helping California reinvigorate it's dominate legacy of aerospace innovation.

KEY COMPANIES

- | | |
|---------------------|-------------------------|
| » Cobham | » Honeywell |
| » Cubic Corporation | » Lockheed Martin |
| » General Atomics | » Northrop Grumman |
| » GKN Aerospace | » UTC Aerospace Systems |



INNOVATION



MILITARY



TOURISM



LOCAL



INTELLECT

SPOTLIGHT

General Atomics

Founded in 1955 as a division of General Dynamics, GA is developer of high-technology systems ranging from the nuclear fuel cycle to electromagnetic systems, remotely operated surveillance aircraft (UAV), airborne sensors, and advanced electronic, wireless and laser technologies. GA and affiliates' facilities contain more than three million square feet of engineering, laboratory and manufacturing installations in the San Diego area.



RESOURCES

San Diego Military Advisory Council

SDMAC supports, promotes and represents the common business and other interests of the military, its quality of life issues and the defense industry community in the San Diego area.
sdmac.org

Association for Unmanned Vehicle Systems International

AUVSI is the world's largest nonprofit organization devoted exclusively to advancing the unmanned systems and robotics community. Serving more than 7,500 members from government organizations, industry and academia, AUVSI is committed to fostering, developing and promoting unmanned systems and robotic technologies.
auvsisandiego.com

National Defense Industrial Association

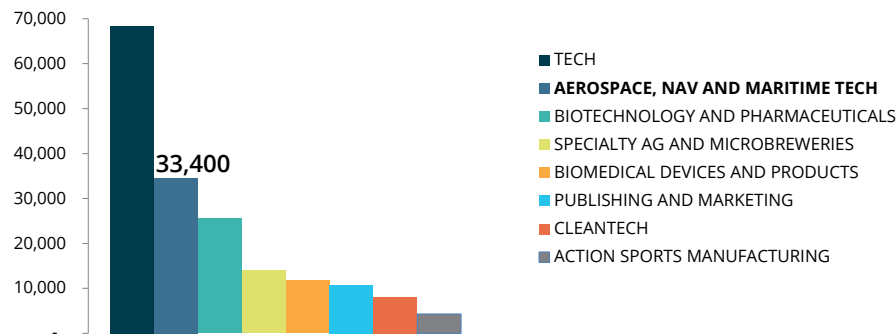
NDIA is the trusted leader in defense and national security associations. NDIA, comprised of its affiliates, chapters, divisions and 1,600 corporate and 85,000 individual members, is a non-partisan, nonprofit educational association that aims to educate its constituencies on all aspects of national security.
ndia.org

BY THE NUMBERS

Employment Numbers

The aerospace, navigation and maritime technologies jobs are not exclusively allocated to San Diego's innovation economy; however, a significant portion of these jobs can be attributed to this economy. The aerospace, navigation and maritime technologies cluster is a vital part portion of the region's innovation economy and in 2014, accounted for **33,400** jobs in the region. Employment breakdown within the region's innovation economy can be seen below.

Employment Comparisons
within San Diego Region's Innovation Economy

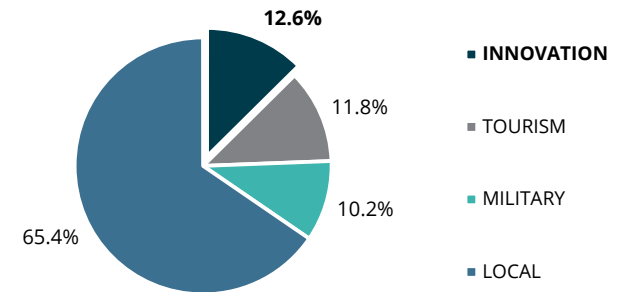


Our Economies

The vitality of San Diego's economy is reliant upon the strength of the region's four economic drivers – innovation, military, tourism and local.

Aerospace is an intrinsic part of San Diego's innovation economy. As of 2014, innovation was responsible for more than 12 percent of the region's total jobs.

Employment Comparisons
Across the San Diego Region's Economies



Employment by Key Aerospace Industries in Aerospace, Navigation and Maritime Technologies

Industry	Employment	Avg Annual Pay	LQ*
Other Aircraft Parts and Equipment	4,960	\$91,000	4.82
Search, Detection and Navigation Instruments	4,910	\$108,200	3.99
Guided Missiles and Space Vehicles	1,930	\$120,300	3.58
Aircraft Manufacturing	1,660	\$100,100	0.72
Aircraft Engine and Engine Parts	1,020	\$90,600	1.35
Other Airport Operations	810	\$23,900	1.24
Other Support Activities, Air Transport	670	\$53,200	0.71
Other Guided Missile/Space Vehicle Parts	150	\$83,400	2.20
Other Shared Cluster Industry Sectors	17,370		
TOTAL AEROSPACE, NAVIGATION AND MARITIME TECHNOLOGIES	33,400	\$93,300	2.19

For more information on San Diego's aerospace industry, please contact:

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*LQ=Location Quotient

Sources: Introduction: 1. "The Changing Face of Aerospace in Southern California", 2016 | Highlights: 1. Institute for Applied Economics & San Diego Regional EDC, "The Changing Face of Aerospace in Southern California", 2016