



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 - economy.

Home to some of the world's largest aerospace, aircraft, and research and development companies, San Diego is a North American aerospace hub. Accounting for nearly one-fifth of the region's innovation employment, the aerospace industry is evolving to include a new wave of innovators pushing the envelope in new space, commercial satellites, unmanned systems, and rockets.

HIGHLIGHTS

- » **Funding the future:** General Atomics Aeronautical Systems Inc. (ASI) partners with Boeing to develop the MQ-25 "Stingray" prototype tanker for the U.S. Navy.¹
- » **Life-saving technology:** Shield AI, a local drone startup whose mission is to save lives with artificially intelligent systems, has raised \$10.5 million in a Series A round led by Andreessen Horowitz.²
- » **RoboSub 2017:** In its 20th edition, the unmanned, underwater robotics competition at SPAWAR's large maritime test facility welcomed more than 300 college and high school students from eight countries to compete to design and build a vehicle from the ground up.³

KEY COMPANIES

- | | | |
|---------------------|-----------------------|-------------------------|
| » 5D Robotics | » General Atomics ASI | » Lockheed Martin |
| » Action Drone | » GKN Aerospace | » Northrop Grumman |
| » Boeing | » Honeywell | » Planck Aerosystems |
| » Cobham | » Inova Drone | » Shield AI |
| » Cubic Corporation | » Kratos Defense | » UTC Aerospace Systems |
| » Epsilon Systems | » L3 Technologies | |



INNOVATION



MILITARY



TOURISM



LOCAL



INTELLECT

SPOTLIGHT

Kratos Defense & Security Solutions

Kratos is a mid-tier government contractor at the forefront of the Department of Defense's Third Offset Strategy. Kratos' primary focus areas are unmanned systems, satellite communications, microwave electronics, cybersecurity/warfare, missile defense, and combat systems. Kratos is headquartered in San Diego and has primarily an engineering and technically-oriented workforce of approximately 2,700, with a substantial number of the company's employees holding National Security Clearances. kratosdefense.com



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. It serves more than 7,500 members from government organizations, industry, and academia. auvisandiego.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

From research and development to engine and part manufacturing, San Diego's aerospace and navigation technologies industry is a key driver of the region's innovation economy. In 2016, the industry accounted for nearly 32,900 jobs across more than 4,200 firms. These companies are actively seeking for talented and skilled individuals. In fact, 2017 alone saw more than 18,200 unique job postings within the industry.⁴



Employment by Key Aerospace & Navigation Technologies Industries⁴

Industry	Employment	Avg Annual Pay
Engineering Services	10,080	\$95,400
Search, Detection & Navigation Instrument Manufacturing	5,770	\$108,800
Other Aircraft Parts & Auxiliary Equipment Manufacturing	5,381	\$86,900
Aircraft Manufacturing	5,274	\$92,700
R&D in the Physical, Engineering, & Life Sciences (except Biotech)	4,008	\$167,300
Testing Laboratories	741	\$88,000
Aircraft Engine & Engine Parts Manufacturing	721	\$85,400
Capacitor, Resistor, Coil, Transformer, & Other Inductor Manufacturing	485	\$84,700
Guided Missile & Space Vehicle Manufacturing	202	\$114,400
Guided Missile & Space Vehicle Propulsion Unit Manufacturing	<10	-
TOTAL AEROSPACE & NAVIGATION TECHNOLOGIES	32,856	\$104,220

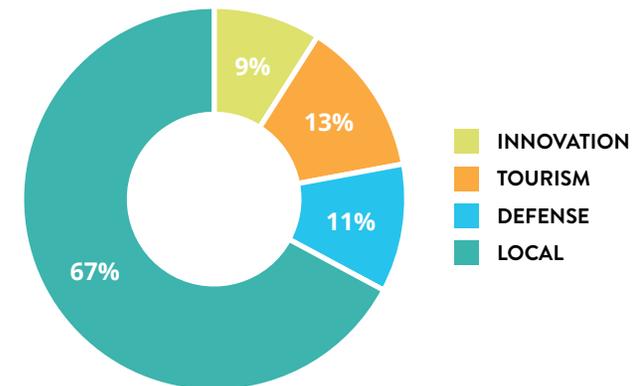
OUR ECONOMIES

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

Recognized as one of the leading high-tech hubs in the U.S., San Diego's innovation economy is anchored by established life sciences, aerospace, communications, cleantech, and software industries fueled by a collaborative culture and sophisticated support systems focused on commercializing research and growing entrepreneurial, knowledge-based companies.

As of 2016, the innovation economy was responsible for nine percent of the region's total jobs. A key driver, aerospace accounted for nearly one-fifth of these jobs.⁵

Employment Comparisons
Across the San Diego Region's Economic Drivers



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Sources: 1. Popular Mechanics, "Boeing Tests its MQ-25 'Stingray' Prototype Tanker for U.S. Navy Carriers," 2017 2. San Diego Business Journal, "ShieldAI Raises \$10.5 Million in Series A Round," 2017 3. Defense Visual Information Distribution Center, "RoboSub 2017 kicks off 20th year of unmanned, underwater robotics competition," 2017 4. EMSI, 2017 5. San Diego Regional EDC, Traded Economies Analysis with BLS data, 2016