

South Africa Global Market Information Day



CAMASA
Commercial Aerospace Manufacturing Association South Africa

The South African Market Evolution

Pre-Democracy Era

❖ 'Splendid Isolation' – defence expenditure-led market buoyancy

- Innovation – Rooivalk attack Helicopter
- Self-sufficiency – Mirage MRO & Upgrades (Cheetah)

Post-Democracy Era

❖ Public Investment Reprioritization

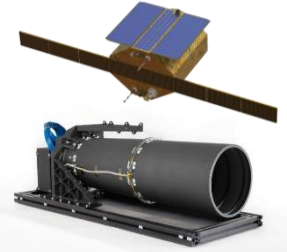
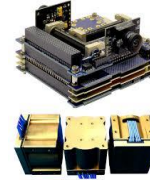
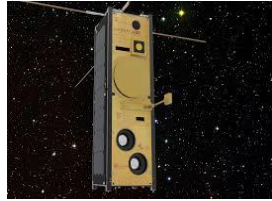
- Western Sphere 'poster child' embrace combines with Globalization (opportunities to integrate to global supply chain conspire to generate a false sense of security)
- Socio-economic upliftment takes centre stage with the direct outcome being a decline in investments, in both aerospace manufacturing and civil aviation
- A constrained aerospace market featuring traditional international Players complemented by some new start-ups (e.g., UAVs – mainly in the services sector and rocket engine manufacturing)
- Emerging BRICS+ environment not yet yielded tangible benefits



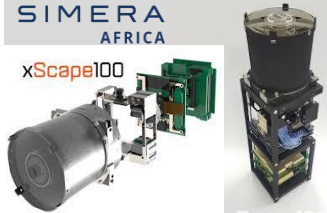
Examples of Commercial Aeronautical Manufacturing in SA



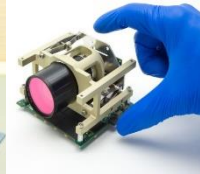
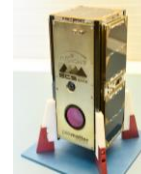
Examples of Commercial Astronautical Manufacturing in SA



xScape100



xScape100



CAMASA – Illustrative Member Capabilities

SERVICES – Aerotechnic

Global Vision. Regional Support.

Africa | Americas | Asia-Pacific | Europe | Middle East

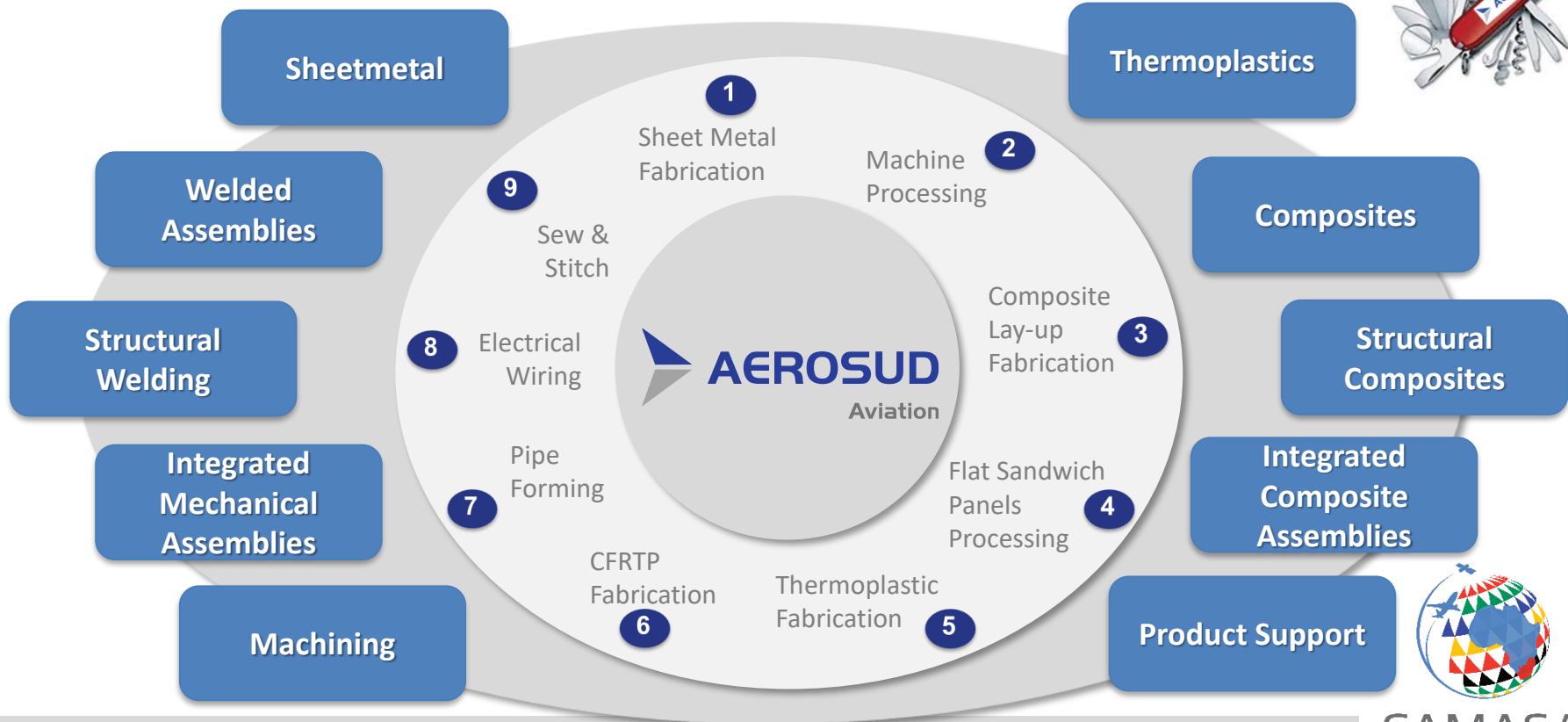


- **Core business is to supply aircraft spare parts worldwide** to major and regional airlines Maintenance Repair and Overhaul facilities (MRO), repair stations, Original Equipment Manufacturers (OEM) and aircraft manufacturers.
- **Distributor and Stockist** of fully traceable Aircraft spare parts New / Overhauled / Repaired for commercial aircraft in the civil aerospace industry. Stocking warehouses located in South Africa (Johannesburg), USA (Florida), Asia (Singapore), UAE (Dubai) and France (Toulouse).
- Through our aviation dedicated software and the agreements we have with a number of repair facilities, we can actively follow-up components under **repair or overhaul** on behalf of our customers.
- **Global representation** of leading manufacturers, offering comprehensive **product support**.



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CAMASA – Illustrative Member Capabilities: Design & Manufacture



CAMASA – Indicative Response to Pro-forma Questions (1 of 2)

1. How mature is the local aerospace market, and what are the primary market segments?

- All 3 segments (defence, commercial aviation & space) are present in SA, however, defence is dominated by foreign EU Players with Embraer seeking avenues for entry.

2. What are the main players in the region?

- Aeronautics: Mainly non-OEM suppliers in both manufacturing and services, tertiary institutions not particularly active in aerospace and collaboration scant.
- Astronautics: mainly satellite component suppliers and OEMs are regularly being bought out by foreign competitor entities.
- Projected African growth (last frontier) can be accessed leveraging SA as a springboard.

3. What are the main strengths/weaknesses of the companies in your region?

- A constrained market since Democracy, with public sector investment focussed on socio-economic emancipation.
- World's worst inequality with a Gini coefficient of 0.63 and unemployment forecast at 33.47% for 2024.



CAMASA – Indicative Response to Pro-forma Questions (2 of 2)

- 4. What business environment can a European company expect when doing business in your region?**
- “Citizen” companies are expected to prioritize indigenous employment as well as promote indigenous entry into asset ownership (Black Economic Empowerment). There is a modest minimum wage policy and a large post-school leaver unemployed pool of young people. The dtic (The Department of Trade, Industry and Competition) has a ‘one-stop’ shop to assist foreign companies seeking entry.
- 5. What government policies, incentives, or support programs are available to aerospace companies operating in or entering your region?**
- There exists a plethora of incentives covering various sectors that can be leveraged for aerospace - <https://www.thedtic.gov.za/financial-and-non-financial-support/incentives/>
- 6. Which short-, medium- and long-term needs is your region currently facing in the aeronautics sector?**
- Supply chain access and integration following intensification of “reshoring” policies and initiatives across the traditional western Partners to SA.



Thank you



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