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HIGH LEVEL DIALOGUE
ON ASEAN ITALY
ECONOMIC RELATIONS

HIGH LEVEL DIALOGUE ON ASEAN ITALY ECONOMIC RELATIONS 2020

2° Digital Round Table

September 30, 2020

PRESENTATION BY NAGUIB MOHD NOR

Main Partner



Junior Partner



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Strategic partner





SERVING MALAYSIA'S **AEROSPACE**
INDUSTRY

Presenter Name: Naguib Mohd Nor



OVERVIEW AEROSPACE INDUSTRY

AEROSPACE INDUSTRY

GOVERNMENT AEROSPACE AGENCIES



INDUSTRY ASSOCIATIONS



REGULATOR



AVIATION

OPERATORS



MRO



OEM's



AIRCRAFT PRODUCTION TIER 1-5



RESEARCH & TECHNOLOGY



HUMAN CAPITAL, TRAINING & EDUCATION



MALAYSIA AEROSPACE INDUSTRY

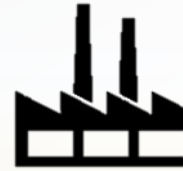


Malaysia Aerospace Industry Association

MAIA is the Industrial Association representing the **Malaysian aerospace supply chain (493 high tech suppliers)** covering a diverse range of aerospace products



Contribute 1.1% (RM16 bil) to national GDP of RM1.4 trillion



Total exports contribution of RM8.81 bil



25,000 total jobs created for the industry



**ELEVENTH
MALAYSIA
PLAN**

2016-2020

ANCHORING GROWTH ON PEOPLE



Aerospace have been identified in the 11th MP as one of the **high tech industry** to drive the growth of the manufacturing sector

OPERATORS

AERO STRUCTURES

AERO ENGINES

MAINTENANCE REPAIR & OVERHAUL (MRO)

AERO MACHINING

AERO TREATMENT

WORLD CLASS REGIONALLY DISTRIBUTED HIGH TECHNOLOGY INDUSTRY

The aerospace industry has been providing companies across the country **opportunities to upgrade their products, skills and processes** via giving them the adjacency from their current business.



Malaysia has become an aerospace technology hub in Asia!



MORE THAN 50 YEARS OF AEROSPACE DEVELOPMENT



MRO – Malaysia is a regional pioneer for the MRO sector incl. Malaysia Airlines Engineering – est. 1972.



Composite Technology Research Malaysia – 1990
One of the largest aerospace composites manufacturers in the world.



SME Aerospace – 1992
Over 1,000,000 aircraft components per year delivered- the largest single supplier of components to the Airbus wing!



GE Engine Services Malaysia – 1997
The only full single aisle jet engine overhaul center in Asia.



Strand Aerospace Malaysia – 2006
Largest Airbus and Boeing approved ASEAN aircraft design company.



Spirit Aerosystems Malaysia - 2007
Largest Tier1 Aerostructures company in the world.



Airbus CS Malaysia - 2014
One of only 4 centres globally covering Airbus engineering for Asia.

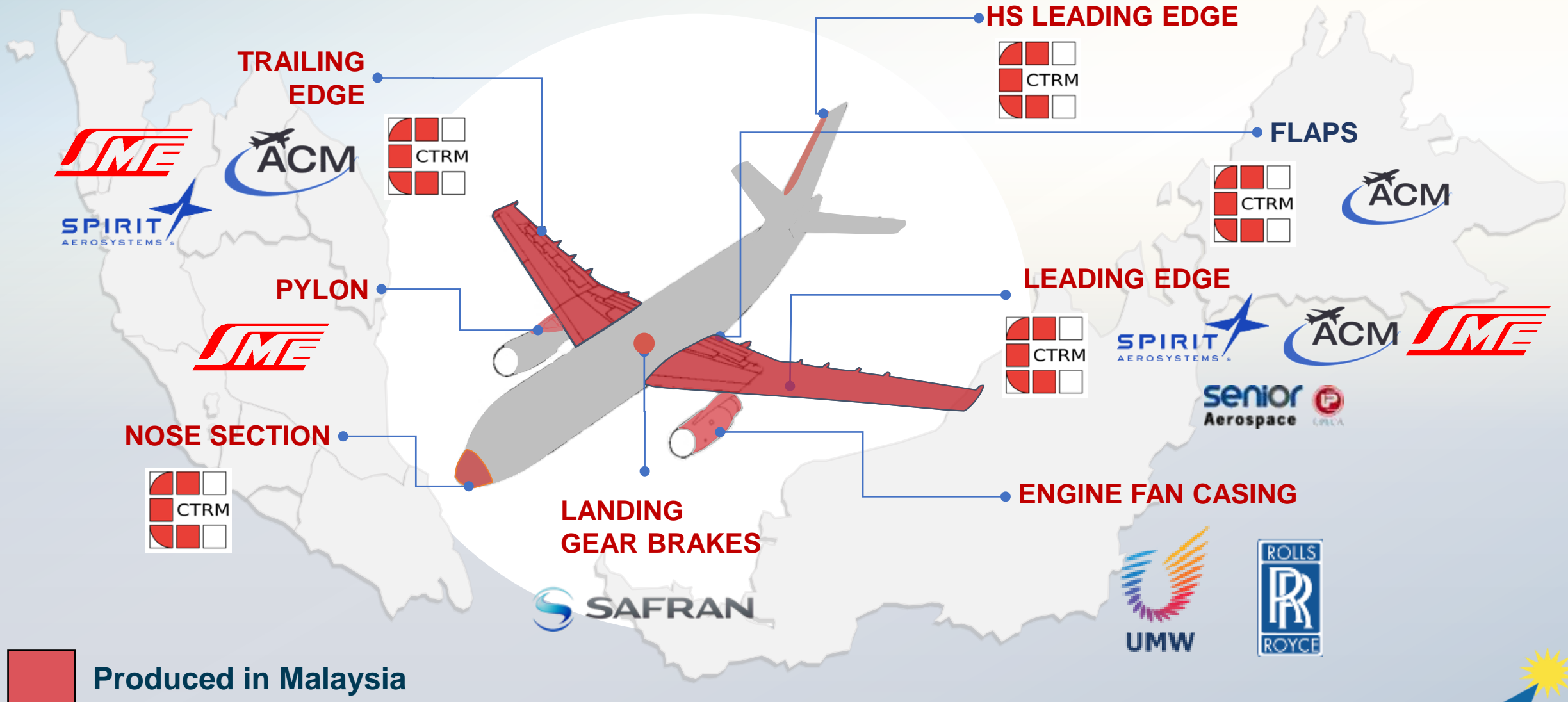


UMW Aerospace - 2015
Tier1 engine components manufacturer.



AEROSPACE CAPABILITIES - MALAYSIA

*Across various aircraft types



HIGHLIGHTED AEROSPACE ACTIVITIES



AIRBUS



- The only Spirit facility outside of Europe/US.
- Assembles the Wing Leading Edge
- A350XWB and Boeing B787



AIRBUS

- 60% of composite wing parts for the A320.
- A400M composites aero components



- Strategic alliance between Hexcel and Boeing.
- Composite structure parts for all of Boeing's commercial aircrafts.



Rolls-Royce

- The Rolls-Royce Trent 1000 Fan Casing (single-source)
- UMW is Rolls-Royce's first Tier-1 supplier in Southeast Asia



AirAsia

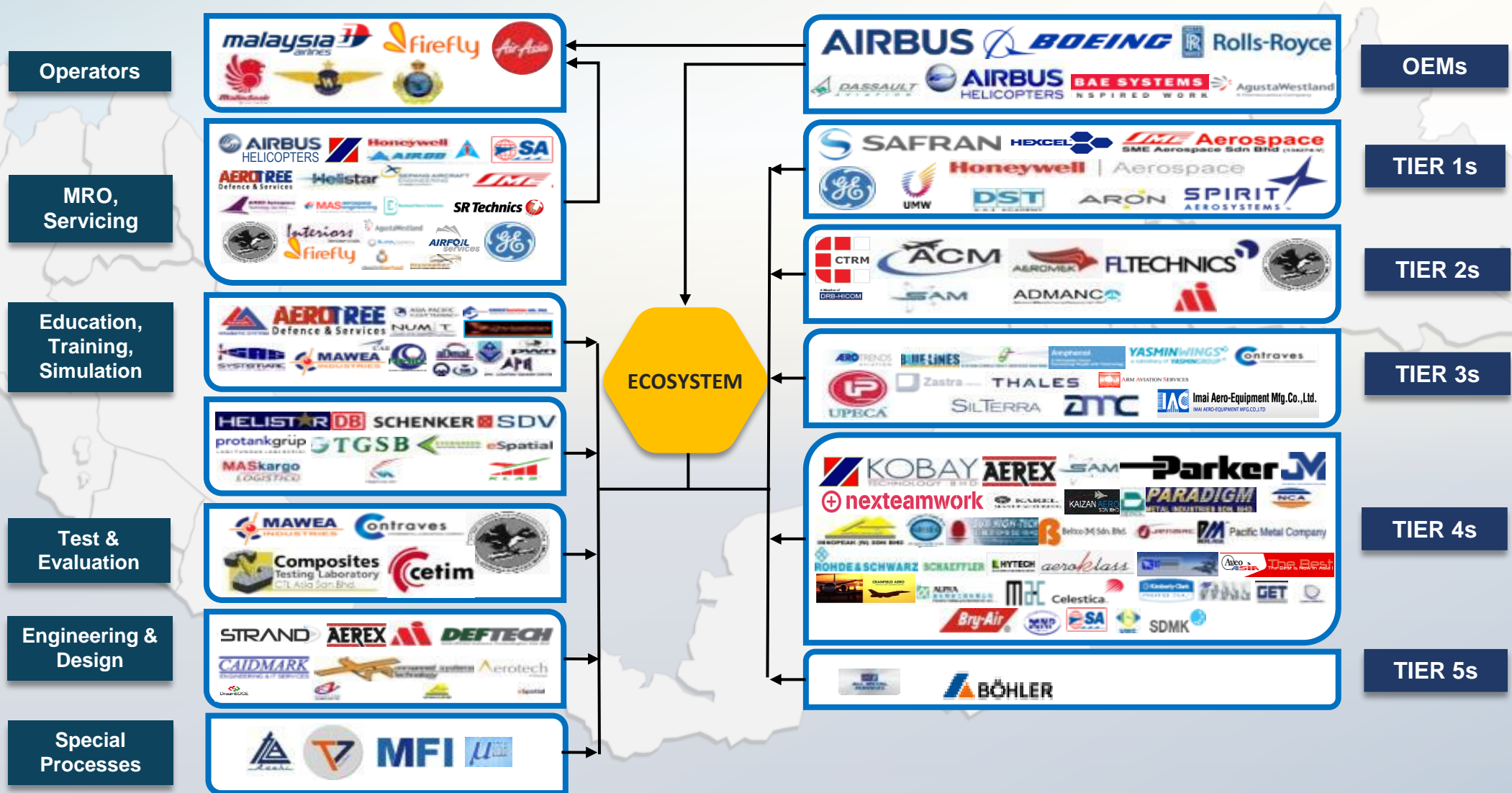
- Largest airline customer for the Airbus A320
- Total order for the A320 Family at 592 aircrafts as of June 2017.



- The SAFRAN Landing Systems Plant in Sendayan,
- Handle 20% of global carbon brake production by 2018



OVERVIEW OF MALAYSIAN AEROSPACE SUPPLY CHAIN



*The above depiction is non-exhaustive



MALAYSIA AEROSPACE BLUEPRINT 2030

REVENUE: RM 55.2b | USD 13.8b
JOBS: 32,000

5

Ultimatums to make Malaysia competitive:

By 2030 Malaysia will be No. 1 aerospace nation in South East Asia and be an integral part of the global market

MRO

Aero-
Manufacturing

Systems
Integration

Engineering &
Design Services

Capture at least 5%
of global market
share

Become no. 1 in SEA
for aerospace parts
& component
sourcing by
targeting to be large
sub-assembly, Tier 1
and RSP (Risk
Sharing Partner)

Self reliant (at least
70% local content) in
integration and
upgrading of
strategic assets

Capture at least
3.5% of global
market share

Education & Training

No. 1 in South East Asia in supplying competent workforce

01

Involvement and development of local players in **major strategic projects**

02

Industry transformation: tech users into **tech suppliers through R&T**

03

Participation in **international aircraft development** programs

04

Reduction in foreign dependency on military aircraft upgrades

05

Creation of **industry focus areas** to have a regional advantage



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