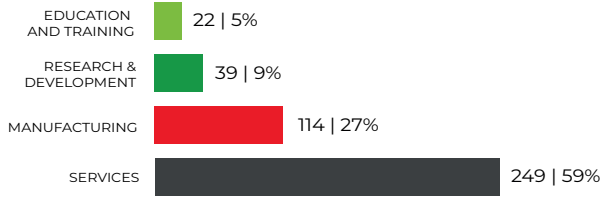


Business Activity and Knowledge - The number of identified companies active in defence is now 363 (350 previously - includes companies not in the BTID) and their aggregate sales decreased by 3.1% in 2020 (compared to 2019), more than that seen in the rest of the economy (down 2%).

363 Firms and 61 R&D and Education/ Training Entities

OF WHICH:



Firms in the Defence Economy

9.4% LARGE
28.5% MEDIUM
62.1% SMALL

40 sectors of activity (dual use)

40.2%
2020

Sales in the defence economy over total sales by firms.

Source: Companies Survey

4.60 Billions €
Total sales by firms in the defence economy

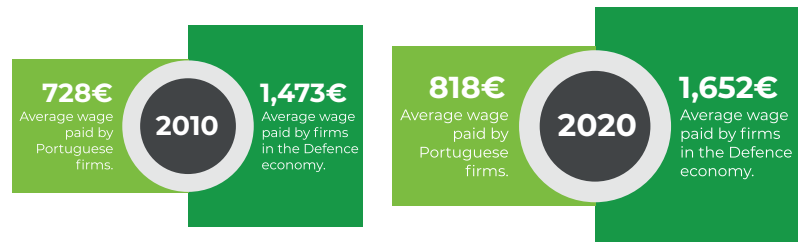


Human Resources - Employment increased by 5.8% (including the effect of the increase in the number of companies), despite the crisis in 2020, and salaries rose more than in the rest of the Portuguese economy (3.6% against 1.2%), continuing to reflect the higher level of productivity.

Sources: INE (SCIE)

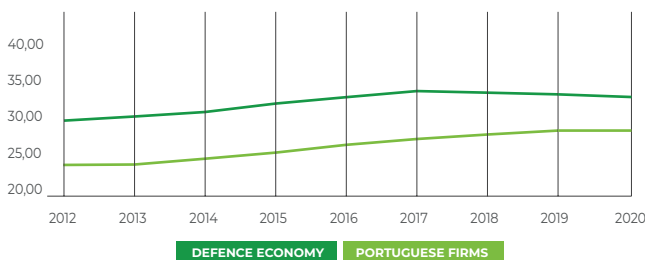


38,844
workers

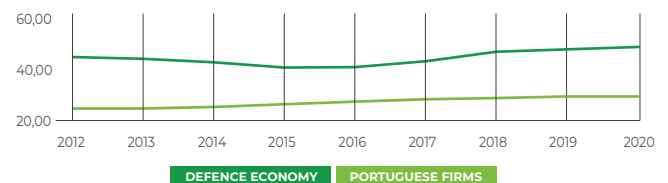


Labour productivity: gross value added per worker
thousand € - 3-year moving average

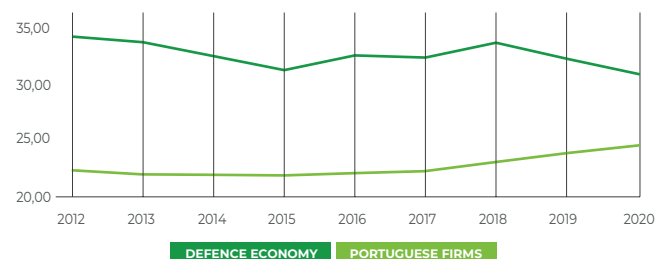
Manufacturing Industry



IT Services

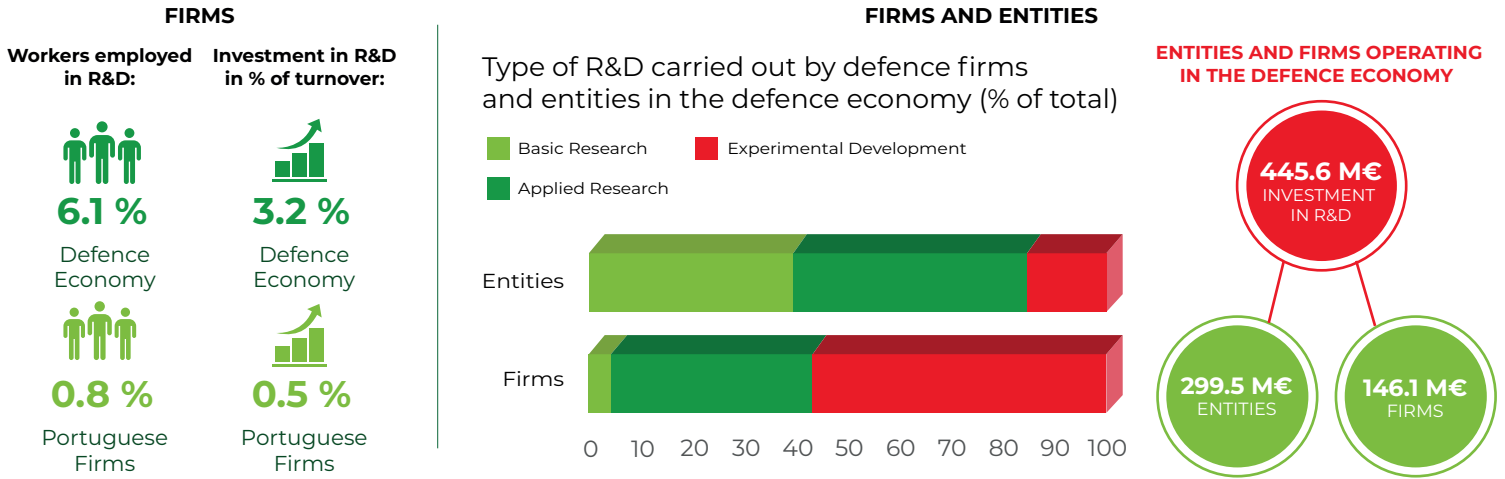


Research and Scientific Activities



Research & Technological Development - R&D investment increased by 9% in 2020 and, together with the number of people assigned to R&D activities, remains significantly higher as a % of turnover in Defence than in the rest of the Economy.

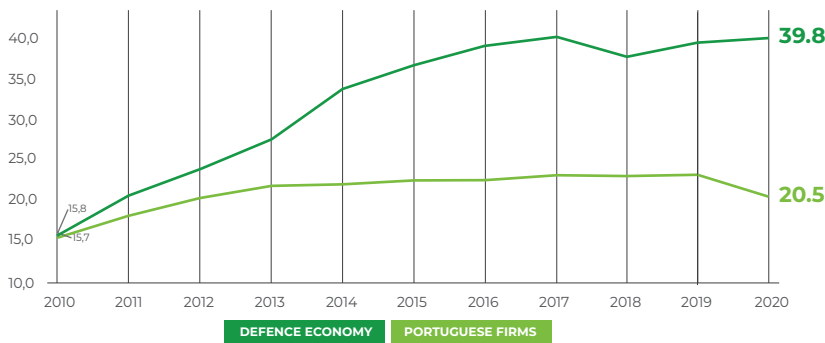
Source: DGEEC



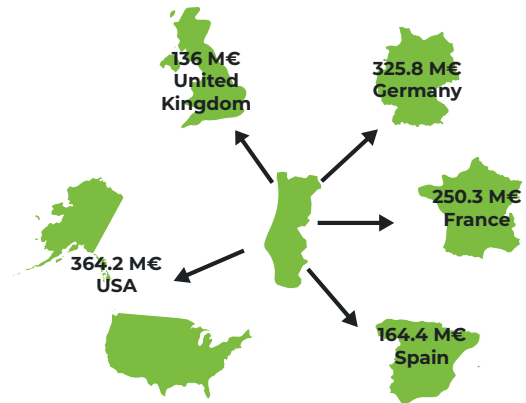
Internationalization - The weight of exports in the defence economy rose from 2% to 2.5% of the total in 2021, which means that companies in this area were less affected by the fall in international trade during the pandemic than the rest of the Portuguese economy.

Sources: INE and Banco de Portugal

Exports of Goods and Services
in % of total sales



Top 5 Defense Economy Export Destinations - Goods and Services



Exports: Weight of Defence

