



Utah Aerospace & Defence Market Opportunity

**CREATE
CHALLENGE
COLLABORATE**



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Section 01

Introduction - MOU



1. Introduction to the MOU between Utah & UK



The UK & Utah Memorandum of Understanding

There are six objectives outlined – which are as follows;

1. Increase trade between the United Kingdom and State of Utah, with the Aerospace & Defence industry being a priority sector for this.
2. Create a forum to identify and address existing or anticipated barriers (such as government procurement) when entering the US Aerospace and Defence industry.
3. Foster innovation, strengthen business links, support women's economic empowerment across all regions of both the United Kingdom and the State of Utah.
4. Improve supply chain resilience through increased co-operation
5. Grow academic and research ties through promoting collaborative projects, research and information exchange.
6. Support sustainable economic growth

Why join the programme?



Why Join?

- **Broaden Your Market:** Dive into an 8-month programme designed to enhance your export opportunities and international visibility.
- **Innovative Connectivity:** Benefit from a digitally connected ecosystem, fostering bilateral trade and partnership successes.
- **Strategic Collaboration:** Engage with international partners, buyers, and sector experts through a technology-enabled platform, increasing your export and partnership outcomes.

Market Assessment:

Gain key insights into potential clusters within high-growth international markets, providing a solid foundation for strategic planning and entry.

Technology-Enabled Collaboration:

Successful applicants will gain access to an online platform designed to facilitate opportunities and foster a digital community among businesses.

Access to Opportunities:

Engage in business development activities and buyer engagements within key international clusters, opening doors to potential collaboration opportunities.

Webinars and Roundtables:

Participate in events with key sector experts in Utah, enhancing communication and collaboration between companies and institutions across both regions.

Section 02
Market Overview



Utah Market Overview

As of 2020, Utah's aerospace industry accounted for 944 establishments and 31,390 employees. The economic output in the Aerospace and Defence sector in Utah amounted to approximately \$9.47bn in 2021, with the GDP in the sector amounting to \$4bn.

Utah's core aerospace and defense competencies include design, composites manufacturing, software and control systems, sophisticated testing, and repair and maintenance. All of these support regional and national air service as well as advanced space systems, which is beneficial for UK companies as the UK has expansive capabilities across these aspects.

Anchored by Hill Air Force Base, Utah is home to prestigious companies like Boeing, Duncan Aviation, Janicki, Lockheed Martin, L3Harris, Northrop Grumman, and more.

Seven higher education institutions offer specialized programs in aerospace, resulting in a high concentration of aerospace engineers, materials scientists, machine operators and other aerospace-related occupations. These organisations will be a great support to any UK companies seeking to enter the space and communication with these will be key to utilising Utah's Aerospace & Defence landscape.



Major Players

- Boeing
- Duncan Aviation
- Lockheed Martin
- L3 Harris
- Northrup Grumman

Major Opportunity Landscape



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Cyber-Security

Companies in Utah in the Aerospace and Defence sectors are highly susceptible to Cyber-attacks due to the sensitive nature of the work that is carried out within it. There are three specific types of attack that Utah companies should protect against – with these providing opportunities for UK companies to enter the market to provide their security services.

Ransomware Attacks

Ransomware attacks are on the rise all over the world, and Utah has not been spared from these malicious incidents. In June 2023, West Jordan City, UT experienced a significant cyber security incident that disrupted the city's IT infrastructure. This attack followed an extortion demand of hundreds of thousands of dollars.

Supply Chain Vulnerabilities

As more businesses rely on third-party vendors and suppliers, it's crucial to assess each business's security protocols and ensure they align with your company's standards. The supply chain has become a major target for cybercriminals looking to exploit vulnerabilities and gain access to multiple businesses' data.

Cloud Security Concerns

Cloud technologies have become integral to businesses, but as more data is stored and accessed through the cloud, it's crucial to ensure proper security protocols are in place



Major Opportunity Landscape



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Drones

The top five companies active in the Drone industry within Utah are as follows; Ark Tech Charge, Ruka, Teal Drones, CFC Aircar and Drone E-Learning. These companies will provide opportunities to supply to and collaborate with – with Teal Drones having developed a relationship with UADA to help accelerate the rebuilding of America’s defense industrial base, specifically for UAVs.

This shows an appetite for Drones in the US Aerospace and Defence industries – providing opportunities to UK companies to access the space and become potential suppliers to both Teal Drones and the UADA. Cargo, Courier Services, Intralogistics and Warehousing have the highest Compound Annual Growth Rate for drone use and therefore may provide the biggest opportunities for UK companies.

Air Mobility

With the Federal Aviation Administration having released its Innovate28 plan for scaled advanced air mobility (AAM) operations by 2028, Utah officials have revealed their own plan to integrate delivery drones, electric air taxis, vertiports and more into the state’s airspace.

The Utah AAM Working Group, part of the Utah Department of Transportation’s Aeronautics Division, this week released a legislative report and study on the implementation of AAM services in regions such as the Salt Lake City metro area. According to the report, Utah already has plenty of potential to support technologies like drones and air taxis.

This is an excellent opportunity for UK manufacturers and solutions providers to enter the industry as it’s in its infancy, with a 10.6% Compound Annual Growth Rate projected in the segment. Similar opportunities are presented here for UK companies as in the Drone landscape for a more commercial purpose.



Areas of Excellence & Organisational Support



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Aircraft Component Manufacturing & Assembly

Utah is home to some of the nation's best Aerospace Manufacturing, with PwC ranking Utah No. 4 in the nation for aerospace manufacturing attractiveness. This provides opportunities for UK companies seeking a manufacturing partner in the US, with Utah also benefitting from a strategic location serves as a prime gateway for businesses to access both West Coast and international markets.

Relevant Organisations

Utah Manufacturing Extension Partnership
Aerospace & Space Dynamics Lab, Utah State University
Utah Center for Applied Innovation & Design (UCAID), Weber State University

Advanced Materials

Over 200 Utah businesses are developing advanced materials and using advanced manufacturing processes for a wide variety of aerospace components. In 2020, Utah's Governor's Office of Economic Opportunity officially designated advanced manufacturing as one of five industries targeted for economic development. The abundance of materials provides UK companies with an opportunity to manufacture with easy access to the supply chain.

Relevant Organisations

Utah Advanced Materials & Manufacturing Initiative (UAMMI)
Utah Composites Laboratory

Unmanned Systems

The Utah Division of Aeronautics is planning for the full implementation and growth of drone package delivery, aerial taxis, and electric aircraft in Utah. UK companies will find opportunities to supply this growing landscape with products ranging from components and materials to fully manufactured drones and air delivery systems.

Relevant Organisations

- Utah Test & Training Range (UTTR)
- Center for Unmanned Aircraft Systems (C-UAS)
- AVUSI Mountain West Chapter

Geography



- Hill Air Force Base is located in northern Utah, just south of the city of Ogden and near the towns of Layton, Clearfield, Riverdale, Roy, and Sunset. The base is about 30 miles north of Salt Lake City.
- Hill Air Force Base is the second largest air force base in the United States by population and geographical size, representing over half of Utah's defense sector and contributes almost \$4bn to the states GDP annually. It is the largest single-site employer in Utah and the economic cornerstone of Northern Utah.
- The Falcon Hill Aerospace Research Park is the largest Enhanced Use Lease (EUL) in the Air Force and one of the largest commercial EULs in the Department of Defense. It comprises 550 acres and almost five miles of interstate freeway frontage near the base. UK Companies will find opportunity here due to the close proximity of commercial and research organisations in the space that will allow for potential collaboration and eliminate the need to set up a greenfield location.

Innovation



Hill Air Force Base is home to the F-35 Lightning II program. The F-35A is the U.S. Air Force's latest fifth-generation fighter. It will replace the U.S. Air Force's aging fleet of F-16 Fighting Falcons and A-10 Thunderbolt II's, which have been the primary fighter aircraft for more than 20 years, and bring with it an enhanced capability to survive in the advanced threat environment in which it was designed to operate.

With its aerodynamic performance and advanced integrated avionics, the F-35A will provide next-generation stealth, enhanced situational awareness, and reduced vulnerability for the United States and allied nations.

Couple this focus on innovation in the commercial and government landscapes, the research and development, along with the highly talented workforce, in the state contributes to the innovation in the sector. A range of world class Universities and Technical colleges provide programs tailored towards the Aerospace and Defence Landscape. This provides UK companies access to renowned R&D facilities which will help to support Innovation.



Research and Development



Major Universities



[Utah State University](#)



[Weber State University](#)



[University of Utah](#)



**WESTMINSTER
COLLEGE**

[Westminster College](#)



[Utah Valley University](#)



**BRIDGERLAND
TECHNICAL COLLEGE**

[Bridgerland Tech](#)



**OGDEN-WEBER
TECHNICAL COLLEGE**

[Ogden-Weber Tech](#)



DAVISTECH
DAVIS TECHNICAL COLLEGE

[Davis Tech](#)



**TOOELE TECHNICAL
COLLEGE**

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Technical Colleges

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