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# Airbus market update and 20 year forecast

Simon F. Pickup

Director - Business Operations, Airbus Americas

# Presentation agenda

- Commercial review
- Global Market Forecast (GMF)
- Airbus product line update

# 2011 was a record year for Airbus

## **Airbus record**

Airbus deliveries **534**

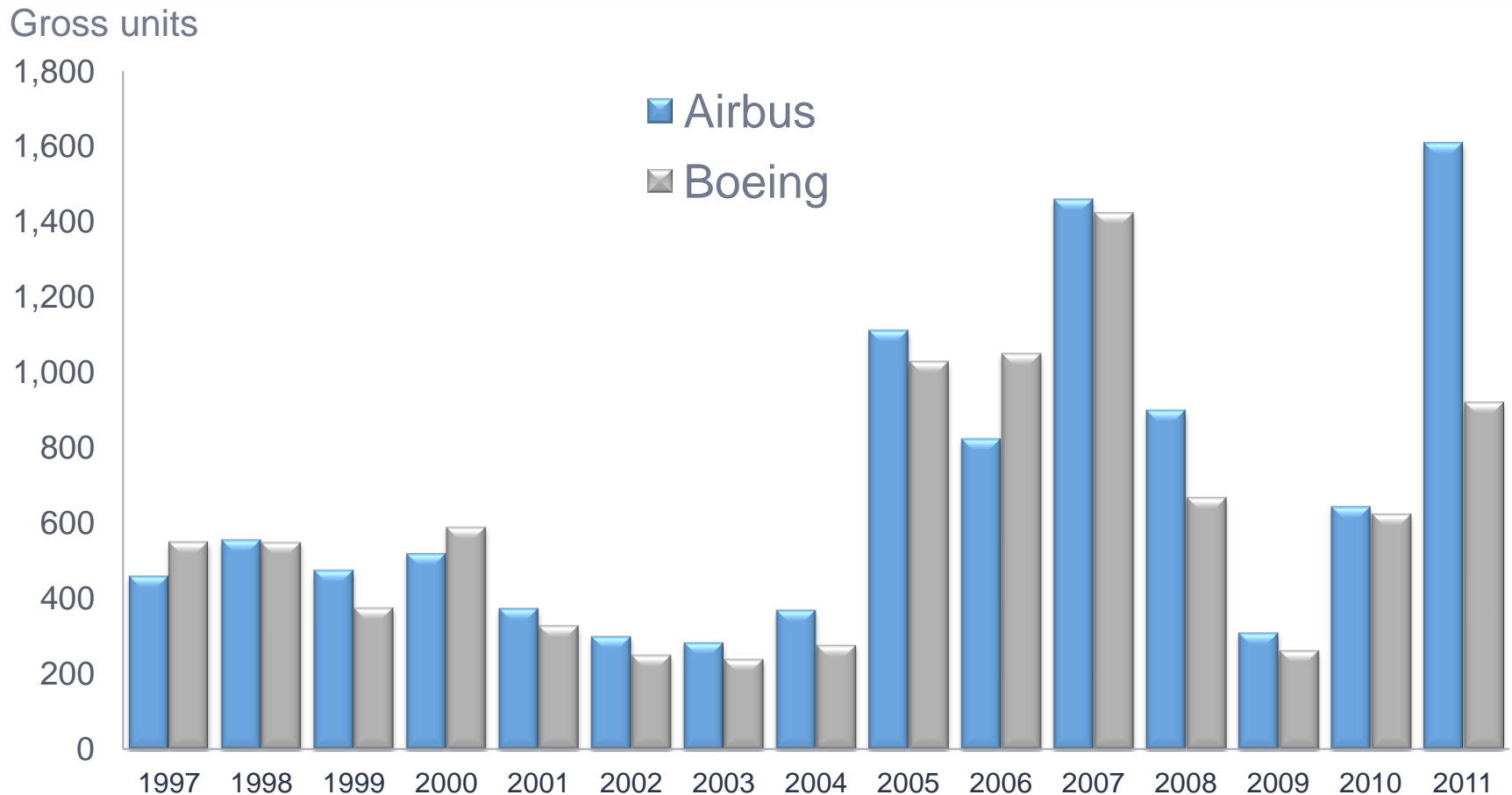
## **Industry records**

Airbus orders **1,608** gross  
**1,419** net

Airbus year-end backlog **4,437** aircraft

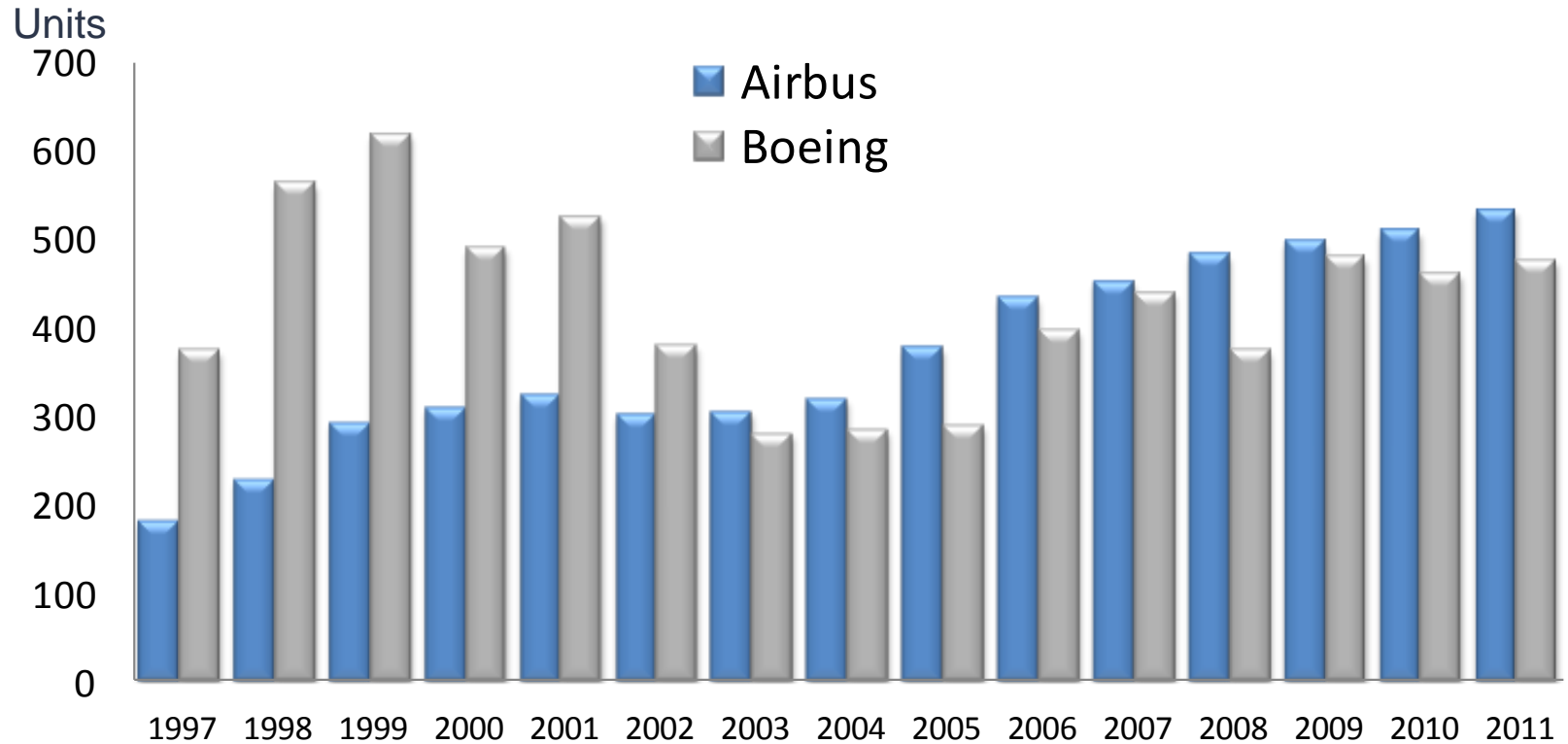
Sales of a new model **1,226** A320neo

# Airbus and Boeing orders over the last 15 years



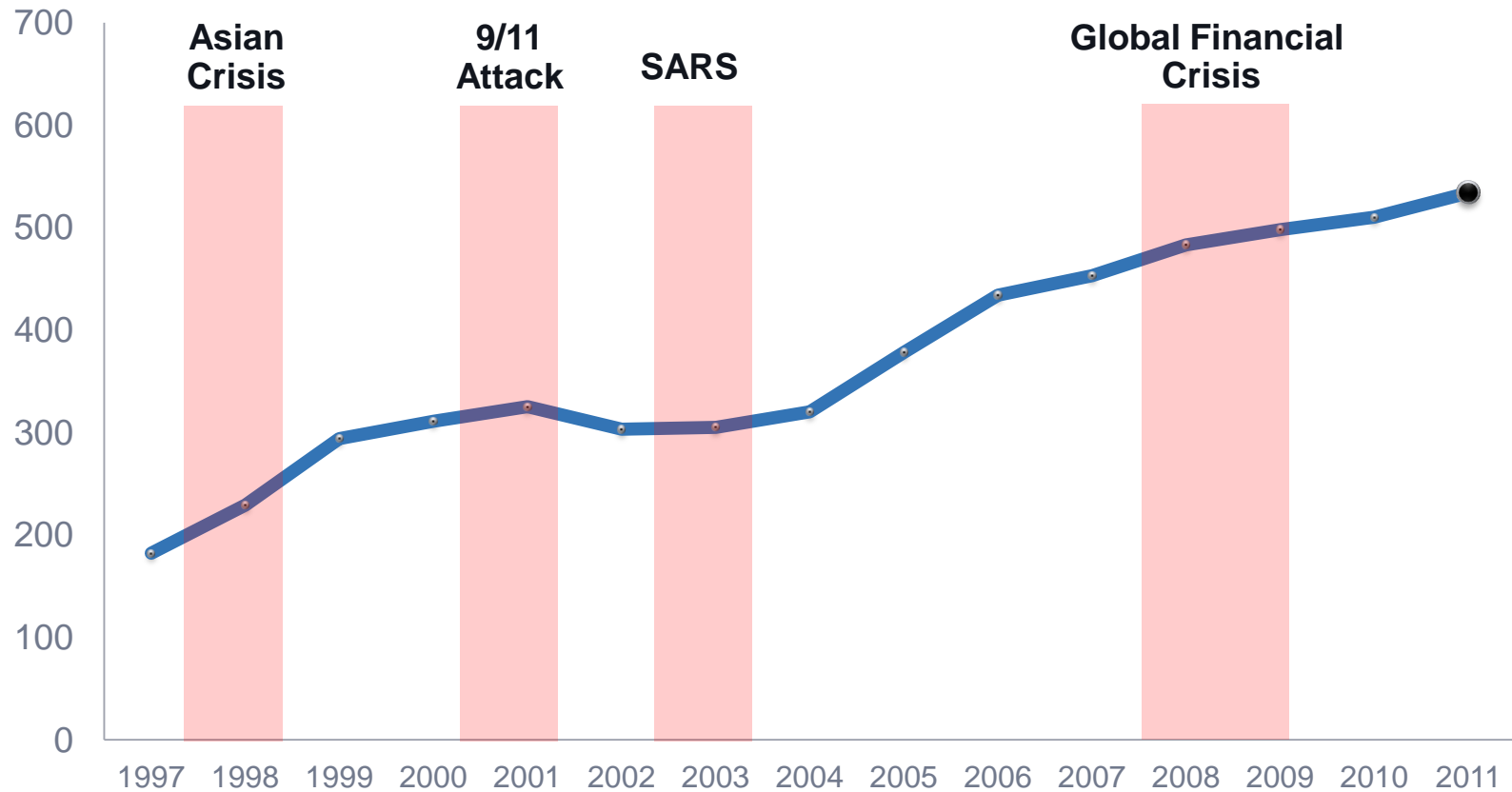
Both Airbus and Boeing have seen significant backlog growth since 2005. 2011 saw the industry sales record broken by Airbus.

# 2011 saw combined deliveries of over 1,000 units



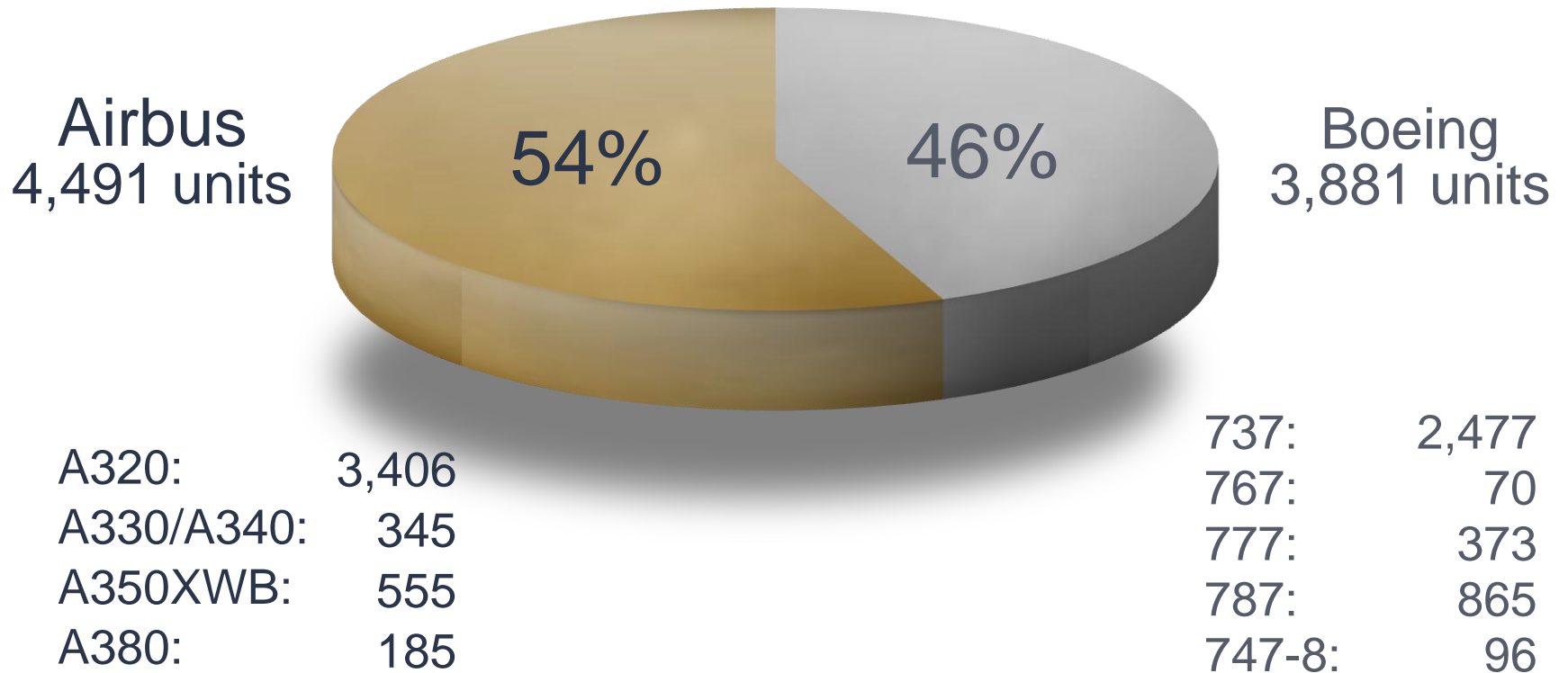
**Airbus 2011 deliveries: 534 units. 2012 target: 570 units. (+7%)**

# Airbus deliveries over the last 15 years



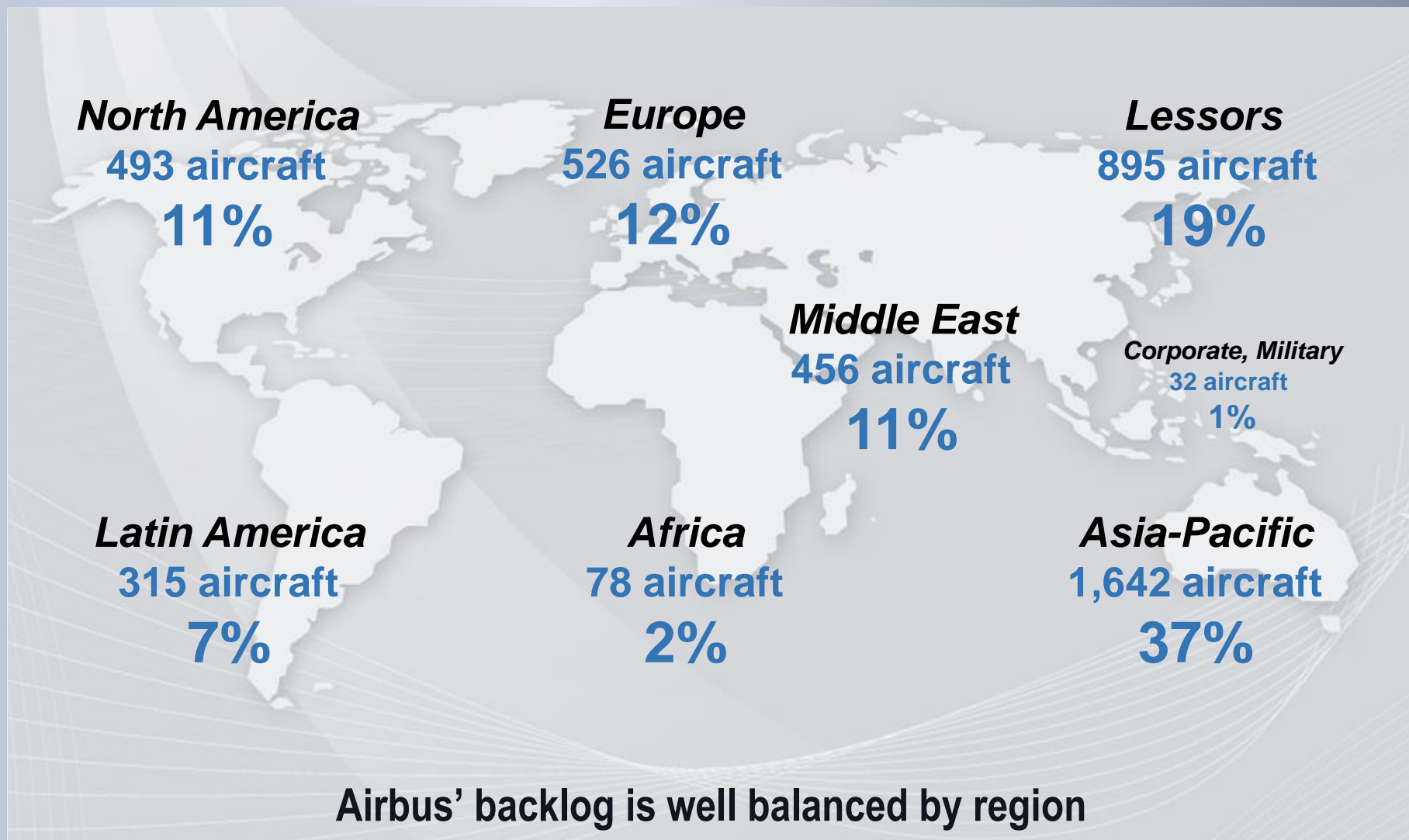
**Airbus' measured production rate increases have obviated the need for drastic output changes**

# The Airbus and Boeing combined backlog stands at almost 8,400 units



**Airbus' backlog represents around 7 years of production**

# Airbus backlog by geographical region



**Airbus' backlog is well balanced by region**

At December 31st, 2011



# Current and planned monthly production rates



A320  
Family

**40 → 42 per month**



A330  
Family

**9 → 10 per month**



A350XWB  
Family

**→ 10 per month**



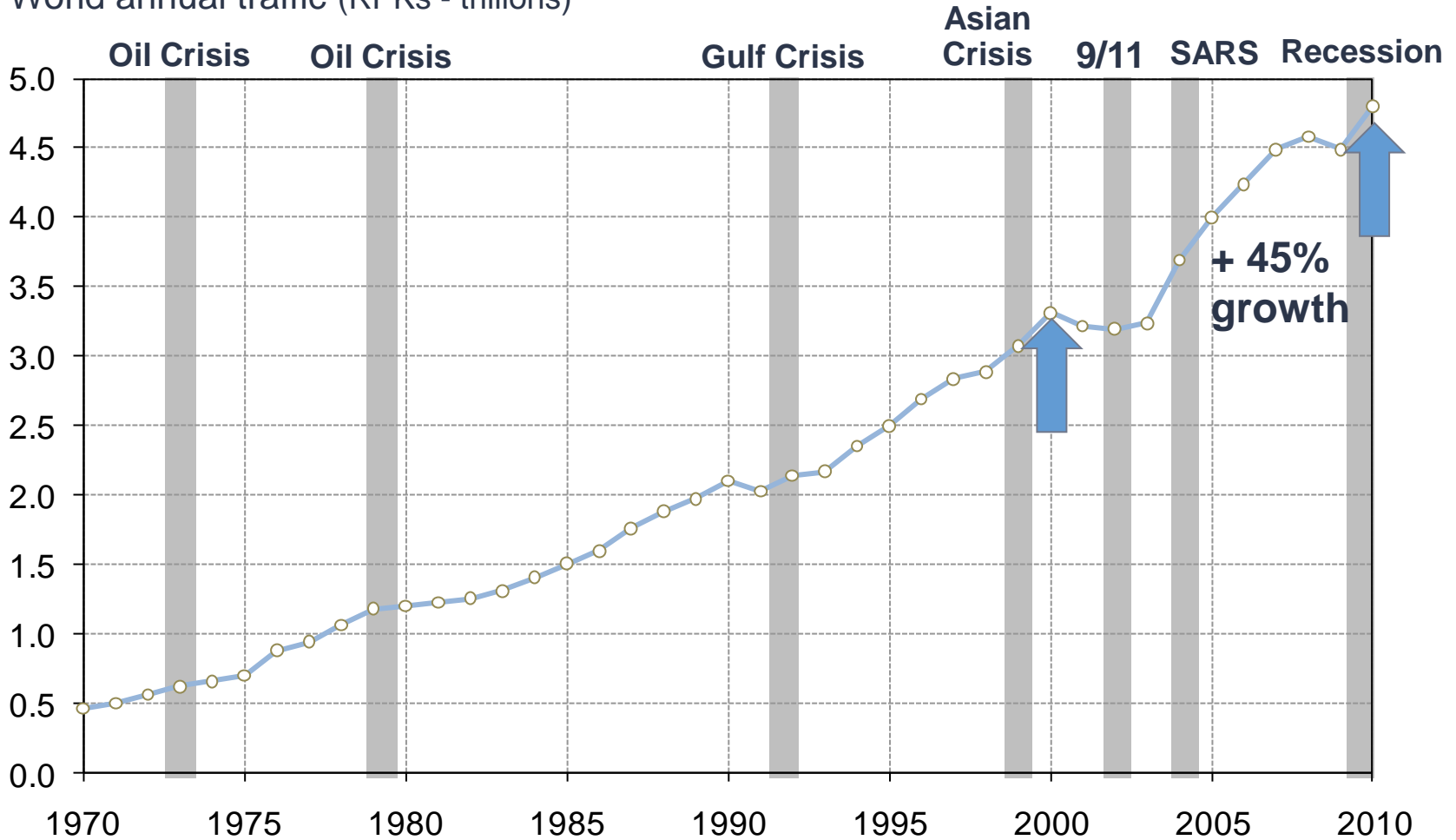
A380

**3 → 3.5 per month**

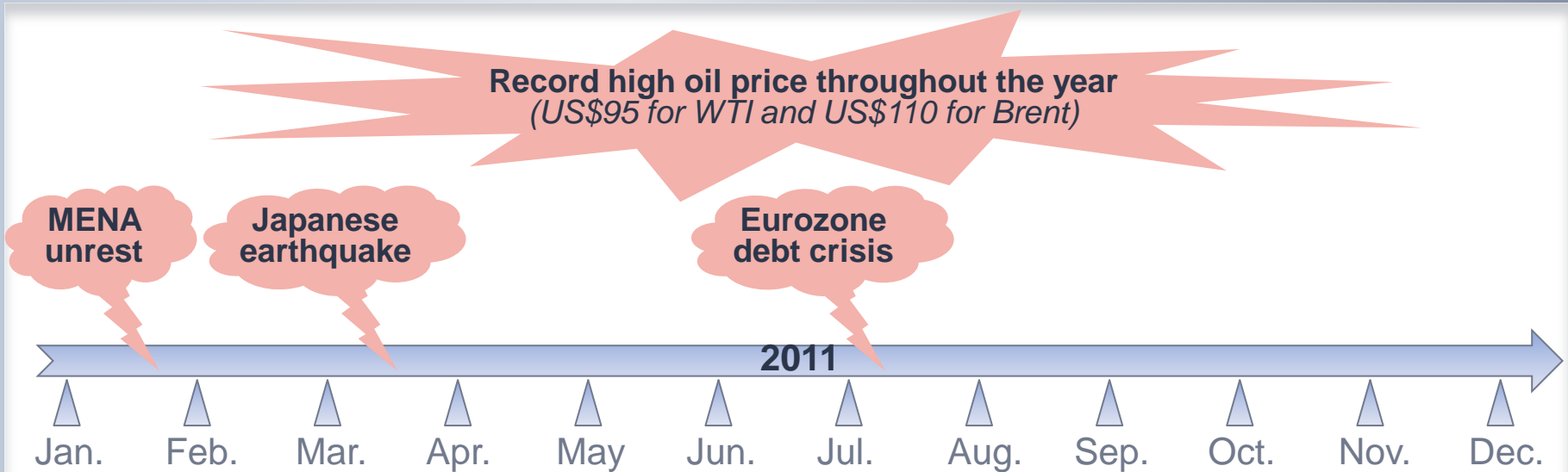
# Air travel has proved to be resilient to external shocks

45% growth from 2000 to 2010

World annual traffic (RPKs - trillions)

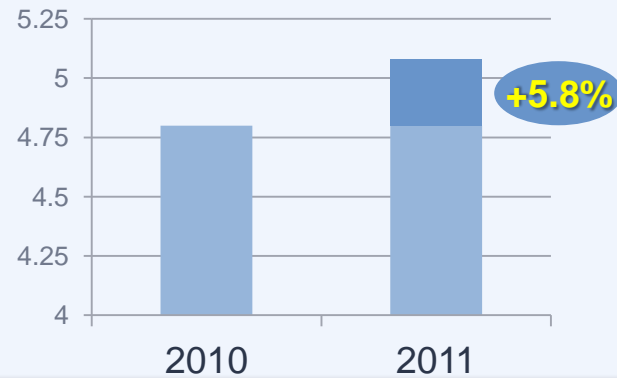


# 2011 saw impressive passenger traffic growth



Despite major external shocks throughout the year, world passenger traffic grew 5.8% in 2011

**World annual passenger traffic**  
(RPKs - trillions)



# Outlook for 2012, according to IATA



“While we have seen some improvements in economic prospects, any further significant rise in fuel price will almost certainly turn weak profits into losses,”

Tony Tyler, IATA Director General,  
March 2012.

**IATA’s current global forecast:  
2012 net industry profit: \$3 Billion**

**Top performing regions: Asia-Pacific, North America and Middle East**

# Jet fuel price volatility



Source: US Energy Information Administration, US Gulf Coast Jet Fuel Spot Prices

# Market Outlook

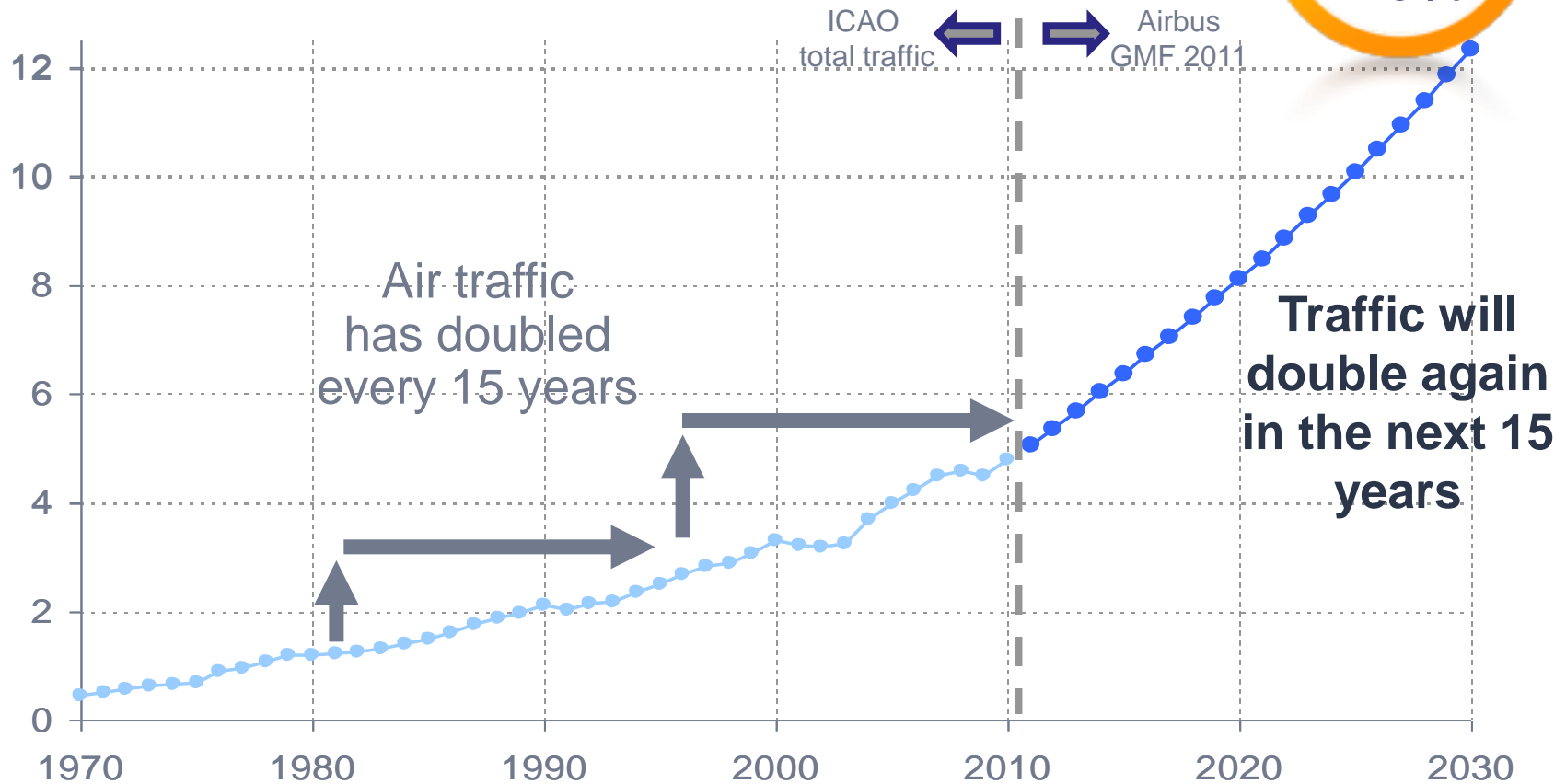
## Global Market Forecast 2011 - 2030



# Air travel remains a robust growth market

20-year  
world annual  
traffic growth  
**4.8%**

World annual traffic (RPKs - trillions)



# 20-year demand for almost 27,800 new passenger and freighter aircraft



**19,170** single-aisle aircraft



**6,920** twin-aisle aircraft



**1,680** very large aircraft

**Market value of \$3.5 trillion**

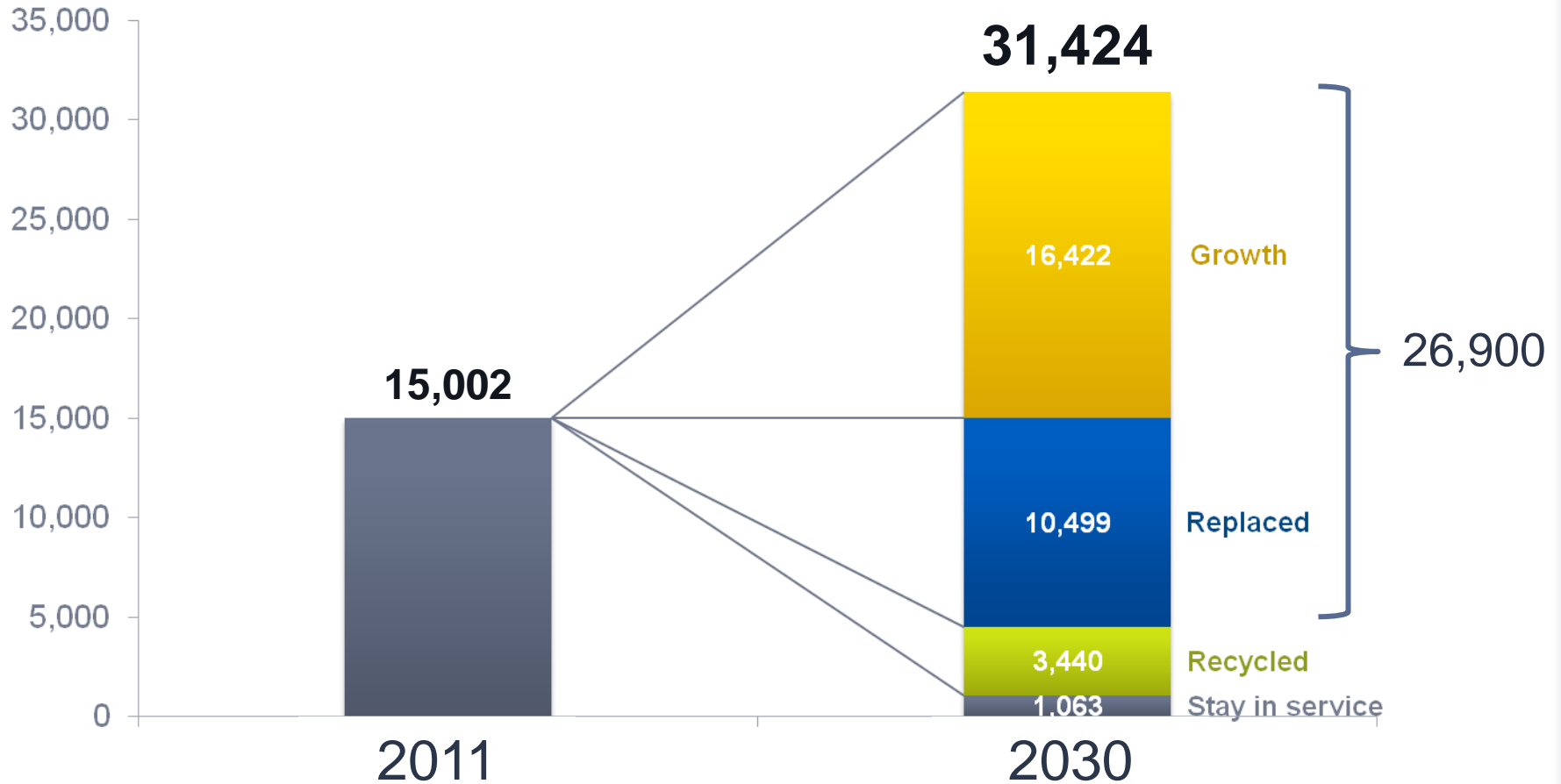
Source: Airbus GMF

Passenger aircraft (≥ 100 seats) Jet freight aircraft (>10 tons)



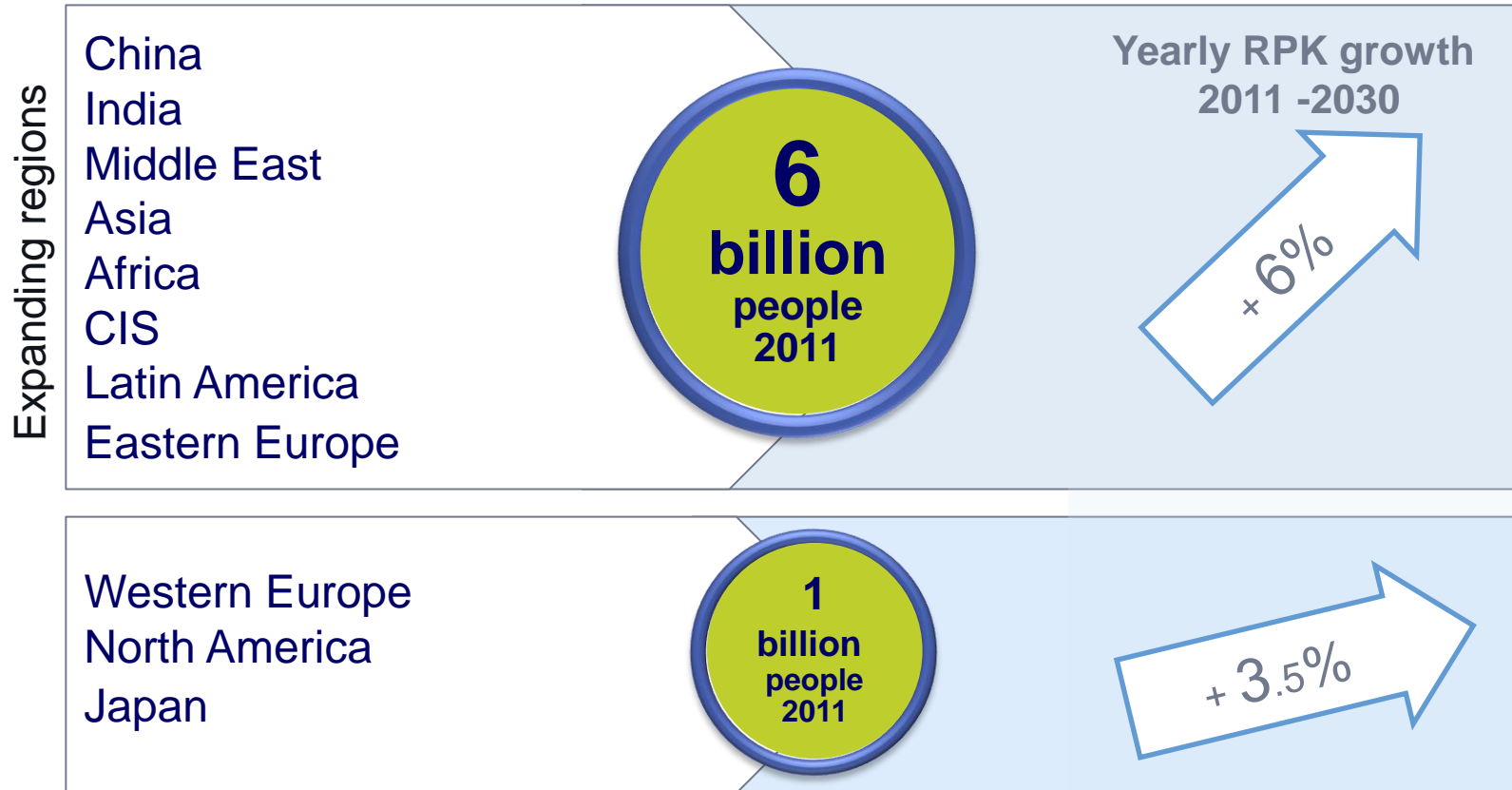
# The in-service passenger fleet will more than double in size by 2030

Fleet size (units)



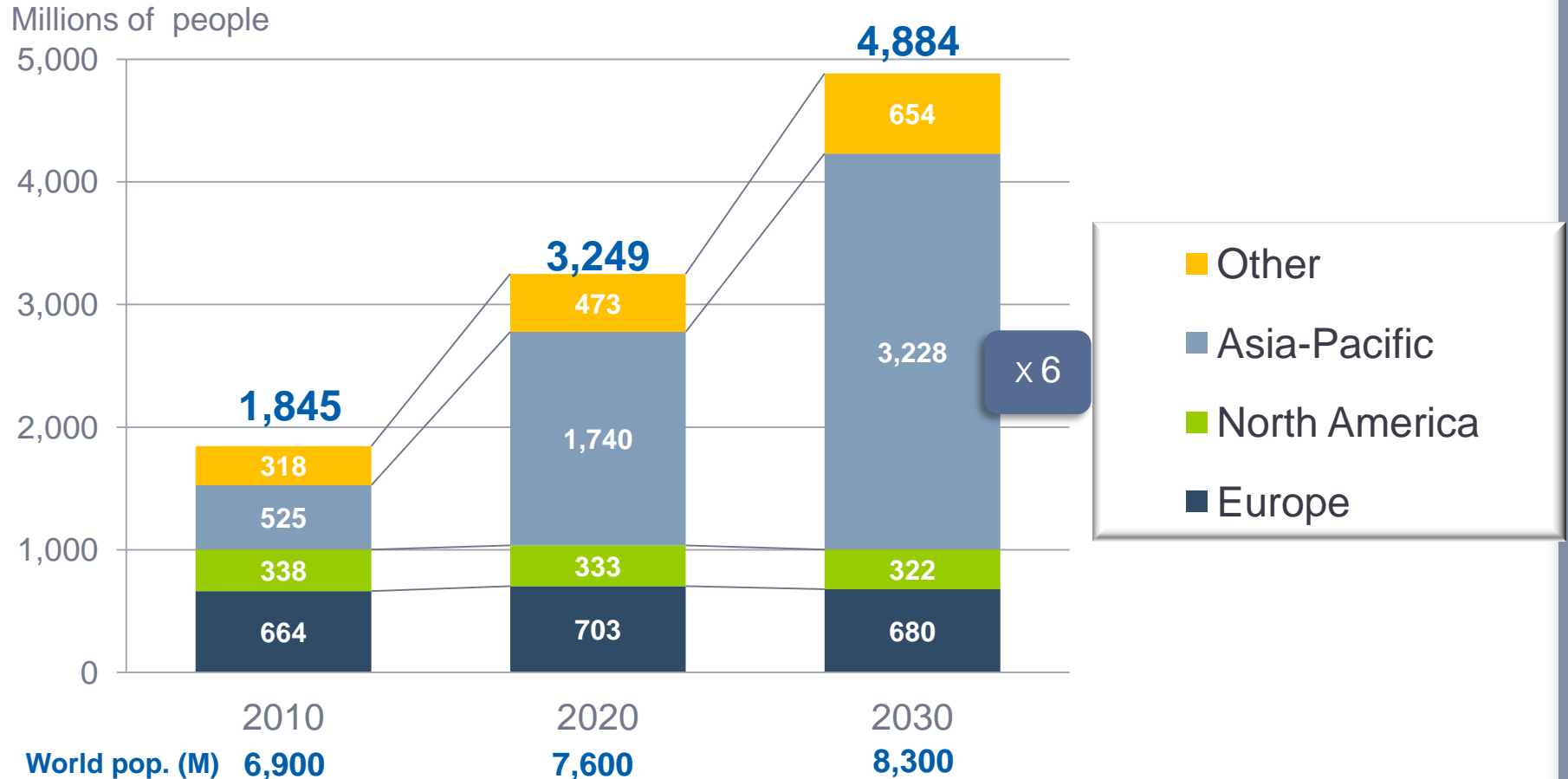
Passenger aircraft  $\geq 100$  seats (excluding freighters)

# Air transport growth is highest in expanding regions



**Population growth, urbanization and economic prosperity will all drive air travel demand in the developing regions**

# “Global middle class” expected to rise to 4.9 billion people by 2030



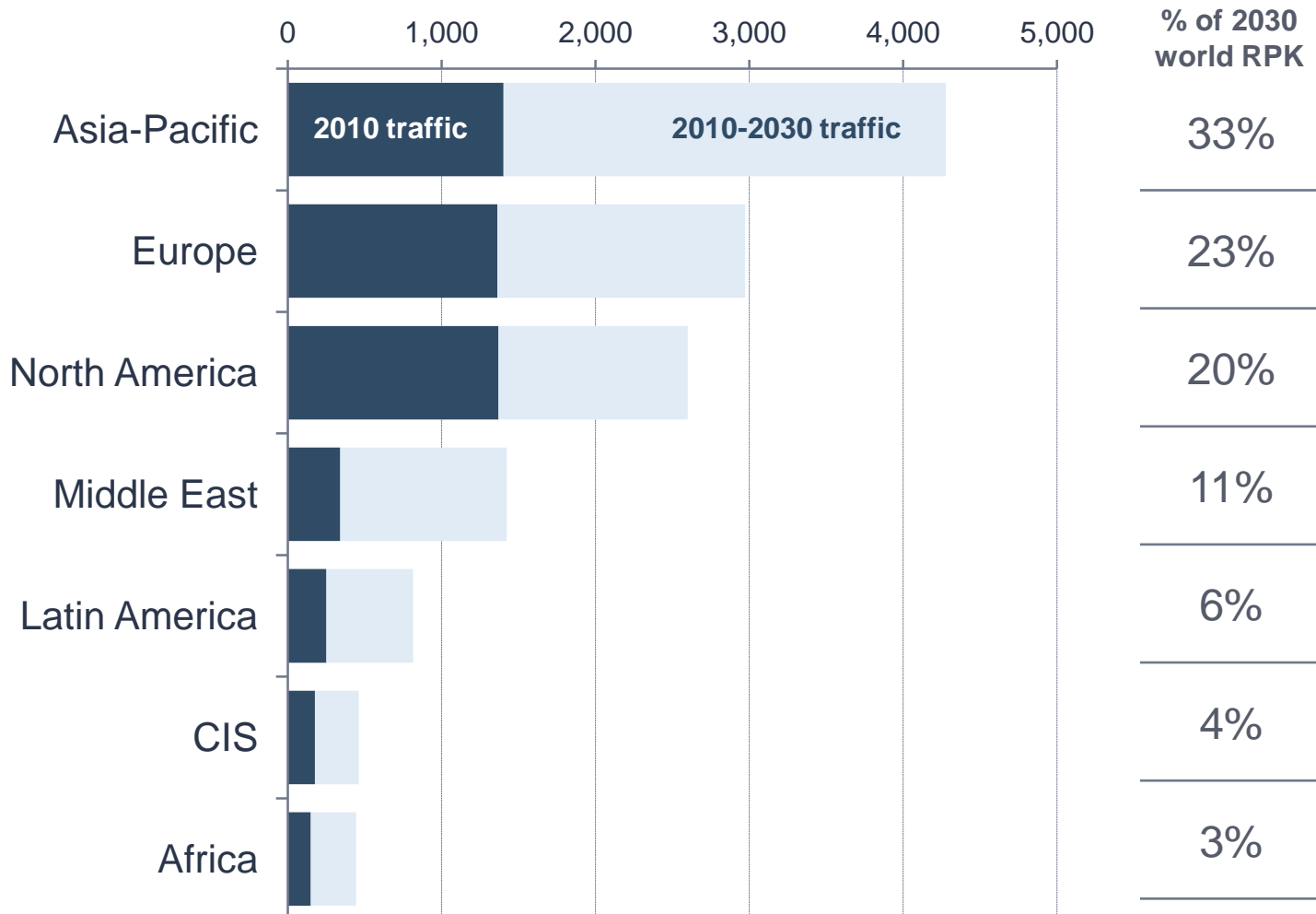
**In 2030, two thirds of the global middle class will be in Asia-Pacific**

Source: Kharas and Gertz, Airbus

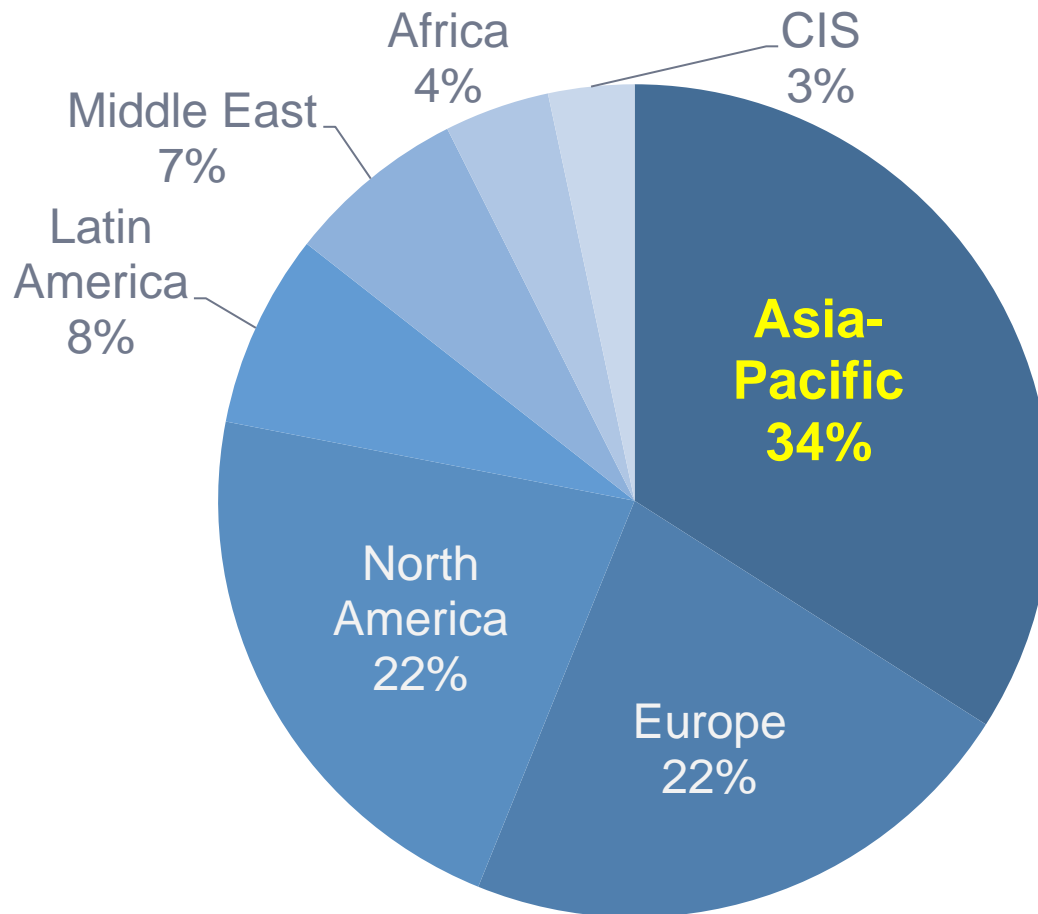
\* Households with daily expenditures between \$10 and \$100 per person (at PPP)

# Asia-Pacific to lead in world traffic by 2030

World Traffic by airline domicile (RPK billions)



# Asia-Pacific to take one third of deliveries North America and Europe take 22 percent each



## Forecast deliveries (units)

Asia-Pacific: 9,160

Europe: 5,950

North America: 5,901

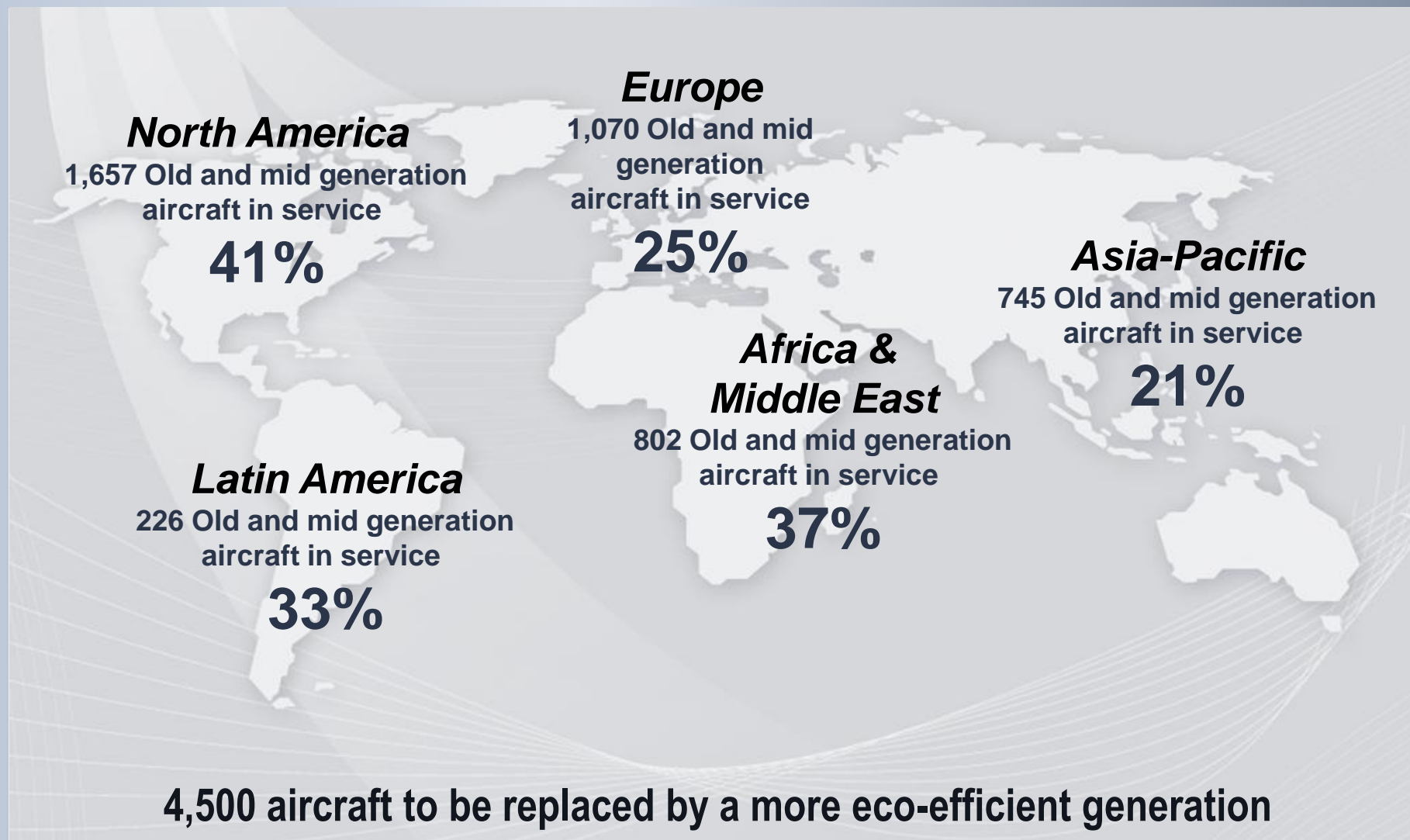
*of which:*

*USA:* 5,389

*P.R. China:* 4,041

**26,921 passenger aircraft delivery demand**

# Significant replacement market



Source: Ascend and Airbus GMF, for end 2010 in-service fleets

Old : A300B, 707, 727, 737-100/200, 747-100/200,

Mid: A300-600/A310, 737-300/400/500, 747-300, 757, 767, F100, MD11, MD90/90

New: A320, A300/A340, A380, 717, 737NG, 747-400, 777, ERJ190

# A320 Family

**8,380** firm orders  
**5,051** deliveries  
**3,329** order backlog



**A320 Family – best selling single aisle family**

Data to end March 2012

# The A320neo Family

## **A real step in efficiency:**

- 15% less fuel burn and CO<sub>2</sub> emissions
- 15% more range



## **While maintaining the Family values:**

- Building on proven programme with over 8,300 sales
- Minimum change, maximum commonality
- Maturity from service entry, with low industrial/technical risk

**The A320neo will enter service in 2015**



# A320neo worldwide success



# A330 and A350XWB: complimentary twins

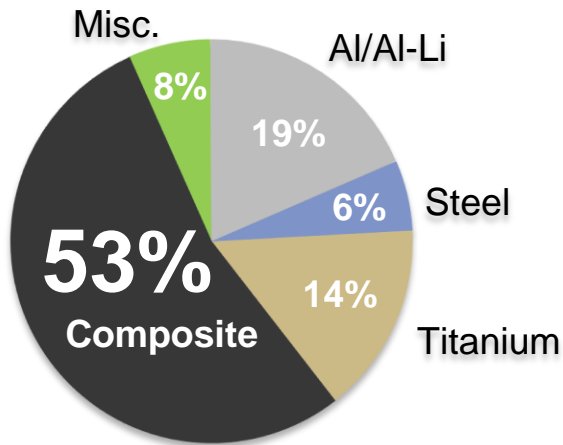
**A330:** 1,188 firm orders  
328 order backlog  
89 customers

**A350XWB:** 555 firm orders  
34 customers



**The A330 and A350XWB Families offer a complete fleet solution**

# A350 XWB: an 'Intelligent Airframe' by design



## ● Titanium

- High load frames
- Door surroundings
- Landing gear
- Pylons
- **No corrosion tasks**

## ● CFRP

- Wings
- Centre wing box and keel beam
- Tail cone (Section 19)
- Skin panels
- Frames, stringers and doublers
- Doors (Passenger & Cargo)
- **No corrosion & fatigue tasks**



# A350 XWB final assembly started

Toulouse France – 5<sup>th</sup> April 2012



**MSN 5000 (static test) front and centre fuselage join-up**



# Trent XWB engine flying test bed



**First flight 18<sup>th</sup> February 2012, over one year before A350 first flight**

# The A380 orderbook – a continuing growth story



**253**  
firm orders from  
**19 Customers**

Data as at January 17<sup>th</sup> 2012

# 71 A380s delivered to date to 7 customers

Around 100 will be in service by year's end



21 A380s



16 A380s



12 A380s



8 A380s



6 A380s



5 A380s



3 A380s

**Malaysia Airlines and Thai will join the operator base this year**

In-service fleet as of end March 2012

# Incomparable popularity



**“A380 flights are almost always full. In all of my 40 years in the business, I’ve never known an aircraft to be so popular. People are especially keen to fly in the A380”.**

**Tim Clark**  
Emirates CEO

interviewed by Süddeutsche Zeitung – 16<sup>th</sup> December 2011



# Airbus has sold 11,569 aircraft to 337 customers

A380 Family



A350 Family



A330 Family



A320 Family



**The only large scale manufacturer with an all fly-by-wire product line**

To end March 2012

Total sales include A330, A310 and A340 models

New standards. Together.





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