



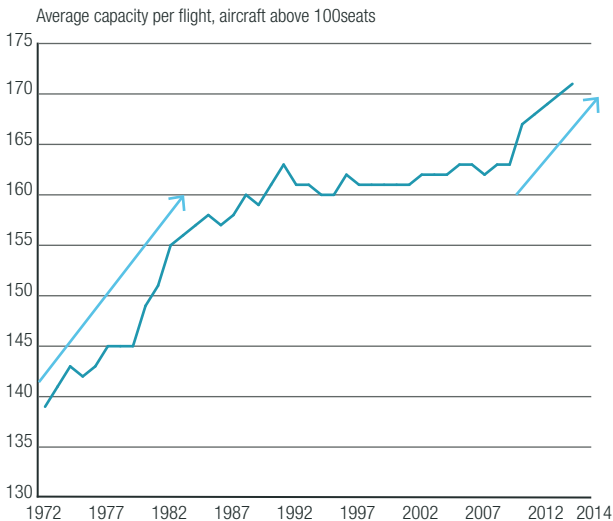
Demand for passenger aircraft

- **Average aircraft size is increasing**
- Average aircraft size per flight has **grown from 139 seats to over 170 seats** since the early 1970's
- **A second period of average aircraft size growth is beginning with today's backlog**
- **Single-aisle aircraft range from 100 to 240 seats, with the A321 offering this highest seating configuration**, with the possibility on the range side of flying 4000nm
- For wide-body types there is operational overlap with the single-aisle, with lower seating limits around 200 seats increasing to 600 or even higher with the A380
- This **overlap has developed** as the capability of both segments of today's aircraft have grown, leaving an already seamless coverage between the single-aisle and widebody markets
- With international **long-haul traffic growing the fastest, the "big points" like Aviation Mega-Cities will grow in importance**. This will have an effect on the size and type of aircraft selected by airlines in the coming years

AVERAGE AIRCRAFT CAPACITY PER FLIGHT HAS INCREASED OVER TIME

Sources: Airbus, OAG

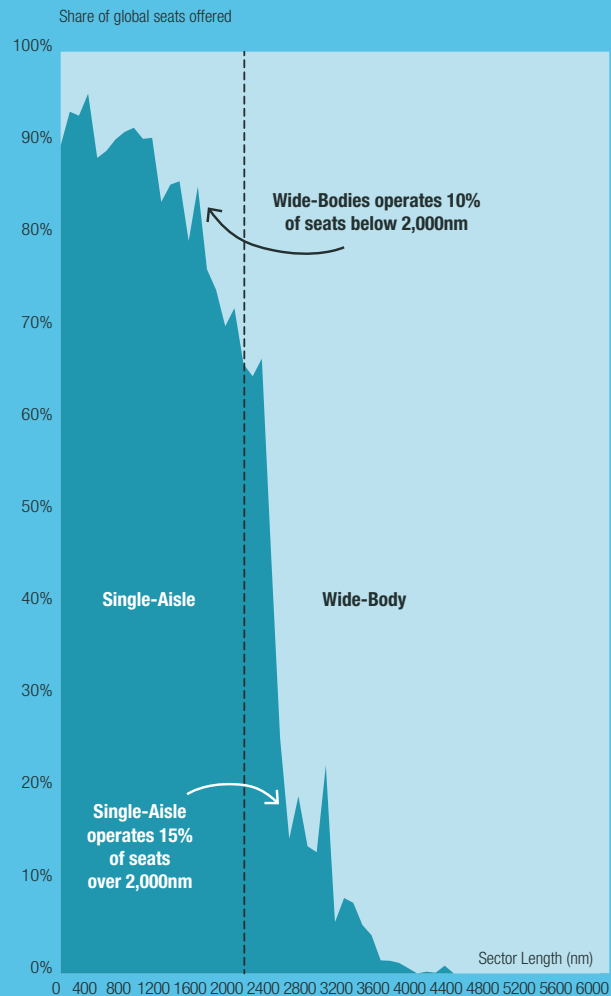
September month for each year



WIDE-BODIES OFFER 10% OF SEATS OPERATED BELOW 2,000NM

Note: September 2014

Sources: OAG, Airbus



AMC to AMC

TO REPRESENT

77%

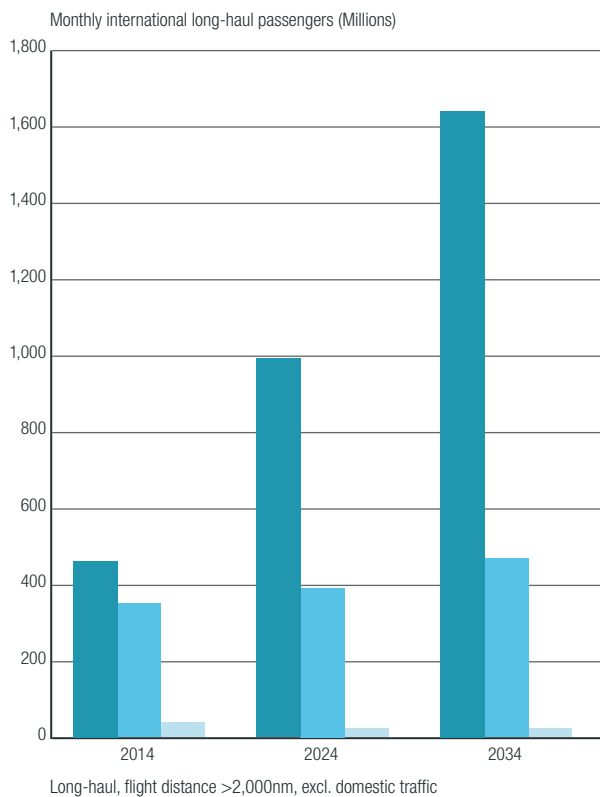
OF ALL LONG HAUL
TRAFFIC

Aviation Mega-City to
Aviation Mega-City

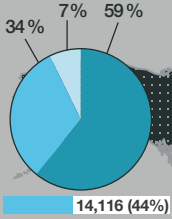
Aviation Mega-City
to Secondary City

Secondary City to
Secondary City

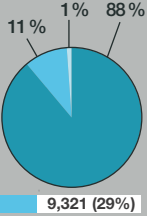
Sources: Sabre (September 2014 data), Airbus



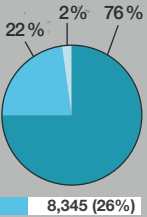
GLOBAL NETWORK



LCCs

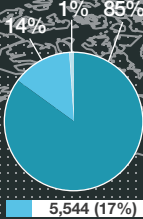


OTHERS*

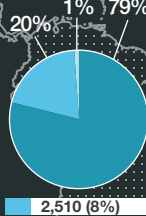


*Charters, Regional, Small and Major network airlines

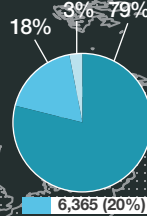
NORTH AMERICA



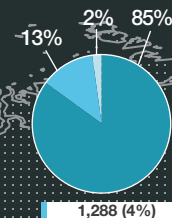
LATIN AMERICA & CARIBBEAN



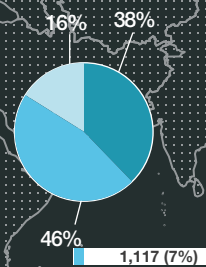
EUROPE



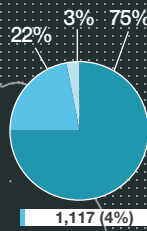
CIS



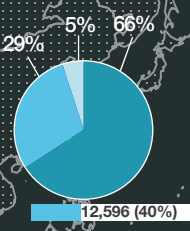
MIDDLE EAST



AFRICA

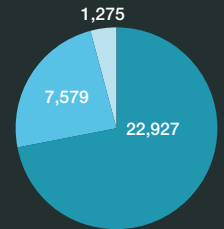


ASIA-PACIFIC

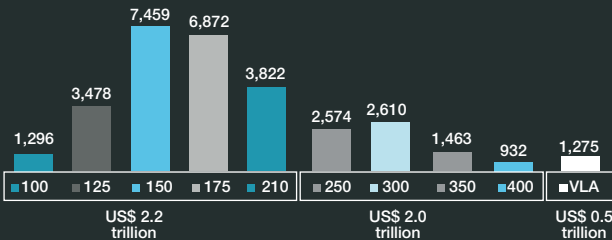


New deliveries

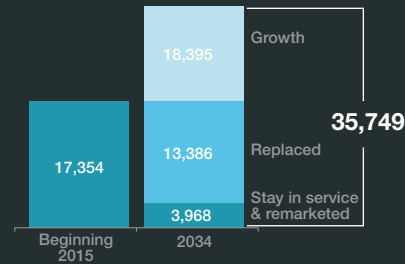
31,781 aircraft



New deliveries by neutral category



Fleet evolution



Market value

US\$ 4.7 trillion

