2013 in review – a successful year for Airbus

- **A320** 10,000th order
- **A330** 1,000th delivery
- **A350 XWB** Successful first flight
- **A380** 10 operators, >100 in service
## A year of new industry records

<table>
<thead>
<tr>
<th></th>
<th>2013 result</th>
<th>Previous records</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Airbus orders</strong></td>
<td>1,619 gross</td>
<td>1,608 (Airbus 2011)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1,458 (Airbus 2007)</td>
</tr>
<tr>
<td></td>
<td>1,503 net</td>
<td>1,419 (Airbus 2011)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1,413 (Boeing 2007)</td>
</tr>
<tr>
<td><strong>Airbus year-end backlog</strong></td>
<td>5,559 aircraft</td>
<td>4,682 (Airbus 2012)</td>
</tr>
<tr>
<td><strong>Airbus Deliveries</strong></td>
<td>626 aircraft</td>
<td>648 (Boeing 2013)</td>
</tr>
</tbody>
</table>
2013 Airbus and Boeing world market share

Net order share since 1995

- **Boeing**: 82% (1,355 aircraft)
- **Airbus**: 18% (1,503 aircraft)

End of 2013
2013 market share by category - net

**Single aisle**
- **2,208 orders**
  - A320: 1,162 (53%)
  - 737: 1,046 (47%)

**Widebody**
- **596 orders**
  - A330/A350: 299 (50%)
  - 767/777/787: 297 (50%)

**VLA**
- **54 orders**
  - A380: 42 (78%)
  - 747-8: 12 (22%)

**ACJ** 1 (25%)
**BBJ** 3 (75%)
**NEO** 876 (56%)
**MAX** 699 (44%)

Data to end 2013
The airline industry enjoyed renewed growth in 2013

*Three billion passengers*

*Global economy climbing out of recession*

IATA forecast 5.4% average annual growth 2013-2017
A return to growth in 2013

Source: IHS Global Insight (December 2013 data), OAG (ASKs data), Airbus
20-year demand for 29,230 new passenger freight aircraft (2013-2032)

- **20,242** single-aisle aircraft
- **7,273** twin-aisle aircraft
- **1,711** very large aircraft

**29,226** new aircraft

Market value of $4.4 trillion

Source: Airbus 2013 GMF
## Order backlogs

### Airbus

<table>
<thead>
<tr>
<th>Model</th>
<th>Backlog</th>
</tr>
</thead>
<tbody>
<tr>
<td>A320ceo</td>
<td>1,688</td>
</tr>
<tr>
<td>A320neo</td>
<td>2,610</td>
</tr>
<tr>
<td>A330</td>
<td>267</td>
</tr>
<tr>
<td>A350 XWB</td>
<td>812</td>
</tr>
<tr>
<td>A380</td>
<td>182</td>
</tr>
</tbody>
</table>

**Combined backlog of over 10,500 aircraft**
2013 Airbus order backlog by region

Backlog of 5,559 aircraft

- **North America**: 12% (20% Backlog end 2013)
- **Europe & CIS**: 18% (24% Backlog end 2013)
- **Middle East**: 10% (7% Backlog end 2013)
- **Asia Pacific**: 34% (38% Backlog end 2013)
- **Latin America**: 7% (8% GMF (2032))
- **Africa**: 1% (3% GMF (2032))
- **Lessors**: 17% (17% GMF (2032))

Data to end of December 2013
A320 Family: 1,253 new A320 Family orders in 2013
876 A320neo, 377 A320ceo

Data to end December 2013

10,193 firm orders
5,895 deliveries
4,298 backlog (1,688 ceo, 2,610 neo)
269 customers
323 operators

A take-off or landing every 2.5 seconds, with 99.6% reliability
The best keeps getting better with Sharklets

- Flight test results show fuel-burn savings up to 4%
- Range increment and take-off performance enhancement
- A319, A320 and A321 all now certified and in service

A320 Sharklet retrofit launched with JetBlue order
Airbus has a clear single-aisle strategy

Delivering more efficiency while maintaining commonality

Efficiency

2011 2012 2015

15% fuel burn saving

Up to 4% fuel burn saving

A320neo

Sharklets

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Strong A320ceo & A320neo sales

A320ceo

294 aircraft
25 customers

Mix A320ceo/A320neo

2,315 aircraft*
27 customers

A320neo

1,013 aircraft
20 customers

Over 1,000 A320ceo orders since launch of A320neo
A320neo has 15% lower fuel burn, more range

Sharklets

New engines

95% airframe commonality with A320ceo
NEO leads the MAX in orders and customers

48 customers

A320neo
2,610 orders
60%

737 MAX
1,736 orders
40%

22 customers
+ unannounced orders

NEO is the preferred market option

Data to end 2013, Source: Airbus Orders & Deliveries, Boeing.com
Increasing demand for A321s

Almost 650 A321 orders and type conversions* in 2013

*From A319/A320 to A321 to end December 2013
Airbus widebody Family: matching market demand
Wide-body sales in 2013

Net passenger and freighter wide-body orders in 2013

341 Airbus vs. 309 Boeing widebody orders in 2013
Airbus leads Boeing in widebody sales

Net passenger and freighter wide-body orders since 2008
Includes commitments from Dubai Airshow not yet firm orders

1,056 Airbus vs. 1,042 Boeing widebody orders since 2008
It’s about serving a market

- Concentrated high passenger demand
- 42 aviation mega cities growing to 89 carrying 75% of long-haul traffic

- Thinner long-haul routes
- Develop new routes and grow existing
- Secondary markets

- Dense short-haul routes constrained by infrastructure
- Feeder routes
Passenger preferences vary

Passenger preferences and expectations move with the market

- Concentrated high passenger demand
- 42 aviation mega cities growing to 89 carrying 75% of long-haul traffic

- Thinner long-haul routes
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- Secondary markets

- Dense short-haul routes constrained by infrastructure
- Feeder routes
Match the right product to the market

Airbus wide-body family matches market demands

Optimised wide-body solution

Complex product offering

Cabin classes

Comfort

Schedule

Price

Reliability

Basic product offering

Demanded level of service

Market

Long Haul trunk routes

Long Haul developing routes

Regional routes

Airbus wide-body family matches market demands
The Airbus wide-body family offers market matched capacities.
Seat width makes a difference: long haul 18” standard

You’d never accept this.

So why would you accept this?
A330 Family – over 1,300 sales

1,313 firm orders
1,046 deliveries
267 backlog
97 customers
103 operators

A take-off or landing every 25 seconds, with 99.0% reliability

Data to end December 2013
Continued market momentum during 2013

<table>
<thead>
<tr>
<th>Operator</th>
<th>Model</th>
<th>Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Turkish Airlines</td>
<td>A330-300</td>
<td>5</td>
</tr>
<tr>
<td>Sri Lankan</td>
<td>A330-300</td>
<td>6</td>
</tr>
<tr>
<td>Delta</td>
<td>A330-300</td>
<td>10</td>
</tr>
<tr>
<td>Air China</td>
<td>A330-300</td>
<td>6</td>
</tr>
<tr>
<td>China Eastern</td>
<td>A330-200</td>
<td>7</td>
</tr>
<tr>
<td></td>
<td>A330-300</td>
<td>1</td>
</tr>
<tr>
<td>China Southern</td>
<td>A330-300</td>
<td>1</td>
</tr>
<tr>
<td>Hainan Airlines</td>
<td>A330-200</td>
<td>1</td>
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<tr>
<td></td>
<td>A330-300</td>
<td>1</td>
</tr>
<tr>
<td>Scandinavian</td>
<td>A330-300</td>
<td>4</td>
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<tr>
<td>Etihad</td>
<td>A330-200F</td>
<td>1</td>
</tr>
<tr>
<td>Qatar Airways</td>
<td>A330-200F</td>
<td>5</td>
</tr>
<tr>
<td>Undisclosed</td>
<td>A330-200</td>
<td>4</td>
</tr>
<tr>
<td>Air Asia X</td>
<td>A330-300</td>
<td>25</td>
</tr>
<tr>
<td>Air Algerie</td>
<td>A330-200</td>
<td>3</td>
</tr>
<tr>
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<td>(MOU)</td>
<td></td>
</tr>
</tbody>
</table>

88 orders & commitments from 13 operators

Data to end December 2013
840 A330s sold since 787 launch

A330 market continues to grow

As end of December 2013
A330 has over 100 operators

Operators by end December 2013. Includes non-commercial operators. 777 & 787 figures reflect publically announced operators with aircraft in-service & on order.
The A330 is *the* regional widebody.
A330 Regional – optimised for regional operations

- Optimized thrust engine: 64～68k
- Lower operational weights: MTOW 199t, other weights offered
- Cockpit optimized for high cycle operations: ROPS, HUD & RNP
- Up-to-date cabin tailored for shorter ranges: Lighter seats & 9-abreast Y

More passengers, lower weight, and lower thrust = Lower unit cost
The A330 serves the long-haul market

Data: OAG January 2014

% of frequencies

40% 60%

City pairs <2,000nm
City pairs >2,000nm
A330-300 242t offers additional capability

Delta orders 10 A330-300
- Deliveries from 2015
- 242t MTOW with >6,000nm range
- 293 seat 2-class configuration

Order placed 4th September, 2013, which also included 30 A321.
A330 & A350 Families are complementary

A350XWB: Primarily long-haul aircraft replacement

A330: Continued medium-haul & regional operations

Complete fleet solutions - matching network requirements today and tomorrow
A350 XWB – Shaping Efficiency

Flight test is on track: over 800 total cumulated flight hours

812 firm orders
39 customers
JAL orders 31 firm A350 XWB and 25 options
Strong customer commitment to A350 in 2013

Over 240 firm net orders and commitments in 2013

As at end December, 2013
Unrivalled A350-1000 efficiency – 25% lower fuel burn

The A350-1000 provides a step change in efficiency

6,500 nm mission, 350 passengers

777-300ER requires +40t higher MTOW (+20 t. Fuel burnt + 20 t. Structure)
777-9X is heavier than 777-300ER

- **777-9X**
- **777-300ER**
- **A350-1000**

**owe**

- +15 t*
- -20 t

**5th derivative**

- 4-frame stretch
- Frame sculpting
- Bigger wing featuring FWT**
- Engine upsize
- …

**Clean sheet design**

777-9X OWE is up to 35t heavier than A350-1000

(*) Airbus estimate

(**) Folding Wing Tips
777X is not enough to beat the A350-1000

A350-900 offers unmatched fuel efficiency today, A350-1000 will be one step further

A380: the answer to market growth

- 304 firm orders
- 19 customers
- 10 operators
- 182 backlog

50 new A380 orders in 2013
122 A380’s delivered to date

10 operators, a fleet that keeps growing

Data to end December 2013
A380 connects more than 70% of today's mega-cities

Handling more than 10,000 long haul passengers per day ...

At the heart of global air transport

>50 000 daily long-haul passengers
>20 000 daily long-haul passengers
>10 000 daily long-haul passengers

OAG Dec 2013
A380 operator base keeps growing

Qatar, Asiana, Skymark and Etihad to take delivery of their first A380s in 2014
The Airbus Family

The VLA market leader
122 delivered to 10 operators

Flight test program well underway
Strong market momentum & recognition

Demand-driven production at rate 10.
Continual improvements to match market needs

Over 10,000 sales
Continued CEO demand

At end December, 2013