A380 – Own the Sky

All around the world

- The most efficient way to grow
- Network optimiser, yield booster
- The best cabin in the sky
- Innovation for efficiency
A380 commercial figures

324 firm orders
128 deliveries
196 order backlog

157,000 revenue flights – 1.3m flight hours and ~55m passengers carried

Commercial data to end March 2014
The **A380** order-book

- **SINGAPORE AIRLINES**
- **BRITISH AIRWAYS**
- **QANTAS**
- **Emirates**
- **QATAR AIRWAYS**
- **AIRFRANCE**
- **KOREAN AIR**
- **ETIHAD AIRWAYS**
- **SKY AIRWAYS**
- **AIR AUSTRAL**
- **malaysia airlines**
- **Lufthansa**
- **virgin atlantic**
- **THAI**
- **ASIANA AIRLINES**
- **TRANSAERO**

- **Private Customer**
- **Undisclosed Customer**

- **324** Firm orders
- **20** Customers including 1 leasing company
- **3** Alliances represented

Data to end March 2014
Introducing the A380 lease solution with Amedeo

"Today’s signature with Airbus is a great day for aviation as we offer airlines a new, more flexible way to access the unique benefits of the A380 through our tailored leasing solutions."

Mark Lapidus, CEO, Amedeo
12th February 2014

New order of 20 A380s signed with Amedeo at Singapore Airshow
A380 is the new flagship

11 of the top 20 international carriers ordered 264 out of 324 A380s

Source: IATA World Air Transport Statistics (WATS) 2013
A380 gross orders since launch

Gross Orders

A consistent order intake from leading airlines
...and 8 uninterrupted years of reorders.

Data to end March 2014
A380 & A350 combination endorsed by the market

A380 & A350XWB

A380 / A350 is a highly efficient combination

Data at March 2014 – Commercial airlines only
128 A380s delivered to date

10 operators, a fleet that keeps growing

Data to end March 2014
A380 network as of March 2014

72 routes - 35 airports

An A380 takes off or lands every 5 minutes

*Subject to agreement by the government authorities and the positive outcome of talks with airport authorities.

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First **A380** for Asiana Airlines shines in full livery

Roll out of the paint shop for the first Asiana A380, to be delivered in Q2 2014
First **A380** for Skymark Airlines maiden flight

Skymark first A380 maiden flight, 8\textsuperscript{th} April 2014 – Delivery H2 2014
The most efficient way to grow

All around the world

The most efficient way to grow

Network optimiser, yield booster

The best cabin in the sky

Innovation for efficiency
The most efficient way to capture growth

**Air Traffic will more than double over 15 years**

**The long haul market is concentrated into mega-cities**

**70% of the 2032 Mega-cities are slot constrained TODAY***

A380 is the most efficient solution to capture growth in a highly concentrated and congested market

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*IATA World Slot Guidelines*

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2012: 42 mega-cities

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

Long-haul traffic is highly concentrated on mega-cities

Source: GMF 2013; Cities with more than 10,000 daily passengers

Long haul traffic: flight distance >2,000nm, excl. domestic traffic.
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

OAG Dec 2013
2032: 89 mega-cities

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

89
Aviation Mega-cities

2.2M
Daily Passengers: Long Haul traffic to/from/via Mega Cities

75%
of long-haul traffic on routes to/from 89 cities

99%
of long-haul traffic on routes to/from/via 89 cities

Source: GMF 2013; Cities with more than 10,000 daily passengers
Long haul traffic: flight distance >2,000nm, excl. domestic traffic;
Airport slots are a scarce resource today

- Of the 89 Mega-cities in 2032, 70% are already congested today
- Airport infrastructure cannot keep-up with traffic growth

IATA World Scheduling Guidelines: Level 2 & 3 at primary city airport
Slot value in congested airports

The A380 is the obvious way to leverage valuable and scarce slots

DID YOU KNOW?

Heathrow:
- Continental paid $200m for 4 daily slots
- Etihad paid $70m for 3 daily slots

More than 150 airports in the world have demand for runway and gate access that exceed their capacity.
Average aircraft size has continually increased over the last 20 years.

The average capacity per flight has grown by 30% in the last 20 years.

Source: OAG (September data), Airbus Market Research and Forecasts
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Network optimiser
yield booster

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Scheduling the right capacity at the right time

Deploy A380 capacity at times of highest demand and yield
Night flights: +8% yield premium

Source: OAG – September 2012 Schedules
Concentration of flights between mega-cities

Slot and time zone constraints drive frequency concentration
The A380 is the most efficient solution for growth

Source: OAG – December 2013 Schedules
Airlines know the pulling-power of the A380

A380 is the only aircraft highlighted in airline on-line booking systems

<table>
<thead>
<tr>
<th>From</th>
<th>To</th>
<th>Flight</th>
<th>Duration</th>
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<tr>
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<td>09:20 Toulouse</td>
<td>L9789</td>
<td>15h25</td>
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<td>23:53 Singapore 13:00 Munich</td>
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<tr>
<td>23:55 Singapore 16:30 Frankfurt</td>
<td>10:15 Toulouse</td>
<td>L9799</td>
<td>25h20</td>
</tr>
</tbody>
</table>
A380 – Own the Sky

The best cabin in the sky

All around the world
The most efficient way to grow
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Innovation for efficiency
### A380 – the best cabin in the sky

<table>
<thead>
<tr>
<th>Advanced temperature control</th>
<th>Comfortable cabin altitude</th>
<th>Low velocity cabin air</th>
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- **The quietest, smoothest cabin**
- **The widest ever Main Deck cabin**
- **Widebody comfort on Upper Deck**

Comfort for all classes, a universally acclaimed airline brand enhancer
A380 – Own the Sky

Innovation for efficiency

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Innovation for efficiency
A380 Continuous improvement

Principal improvements since EIS

- Improved SFC*
- New Design Weights
- +8t payload
- +500nm payload
- Aircraft weight reduction
- Wing twist -1%
- Fuel burn

Improving the passenger’s favourite airliner

SFC = Specific Fuel Consumption
A380 offers higher profitability
British Airways Case Study

New aircraft performing well

Example: Q4 2013 A380 flight vs. B747-400 flight LHRLAX

Cost per seat gain:
Total -17.7%
Fuel -18.4%

Seats +61% (469 vs. avg. 317)
Trip cost +22%

BA’s schedule will change to accommodate the extra capacity of the A380

LAX Summer 2013 daily schedule
LAX Summer 2014 daily schedule

Configuration:
+5% premium
-7% non-premium

Total seats per day -1% (richer mix)
Total trip cost per day -19%

Lower Unit costs
More Premium Seats
Higher Average Yield
Similar Total Capacity
Lower Operating Costs

Lower Cost & More Revenue per Day
And one slot freed to further develop the London Heathrow network
The A380 is the only aircraft capable of:

- Allowing lucrative growth at slot-constrained mega-city airports
- Capturing more high-yield traffic at times of peak demand
- Offering the best cabin in the sky