



# Global Networks, Global Citizens

## Global Market Forecast 2018-2037

Eric Schulz, Chief Commercial Officer

**AIRBUS**

# Agenda



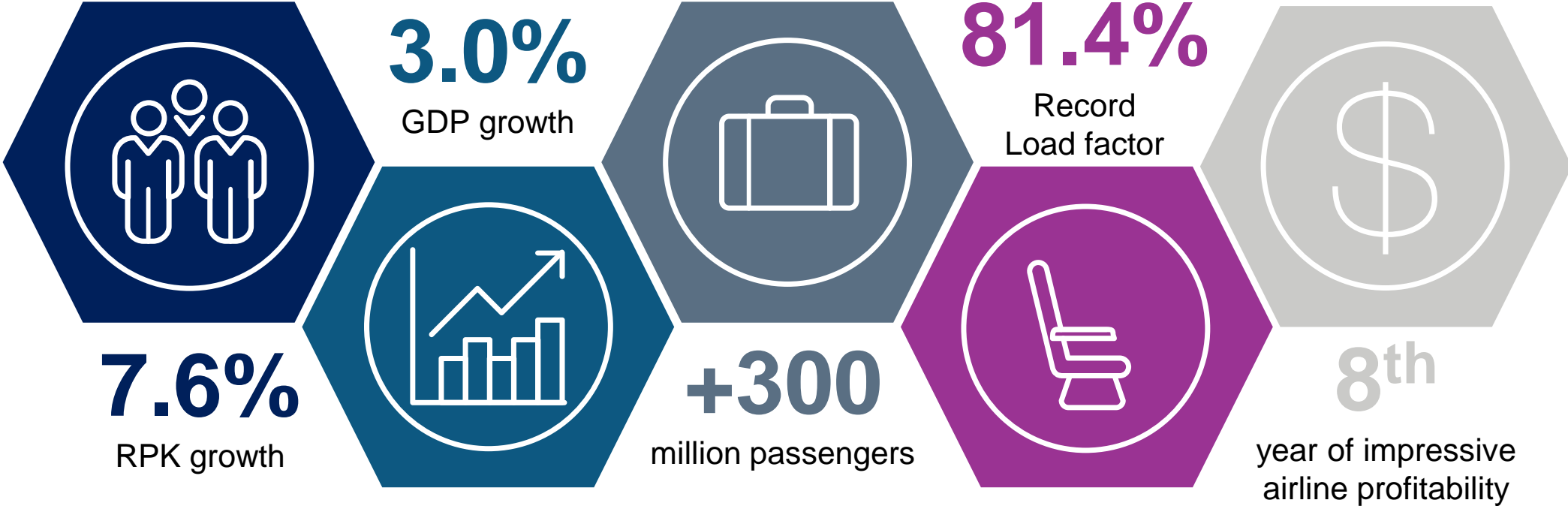
2017 in a nutshell

Growth drivers

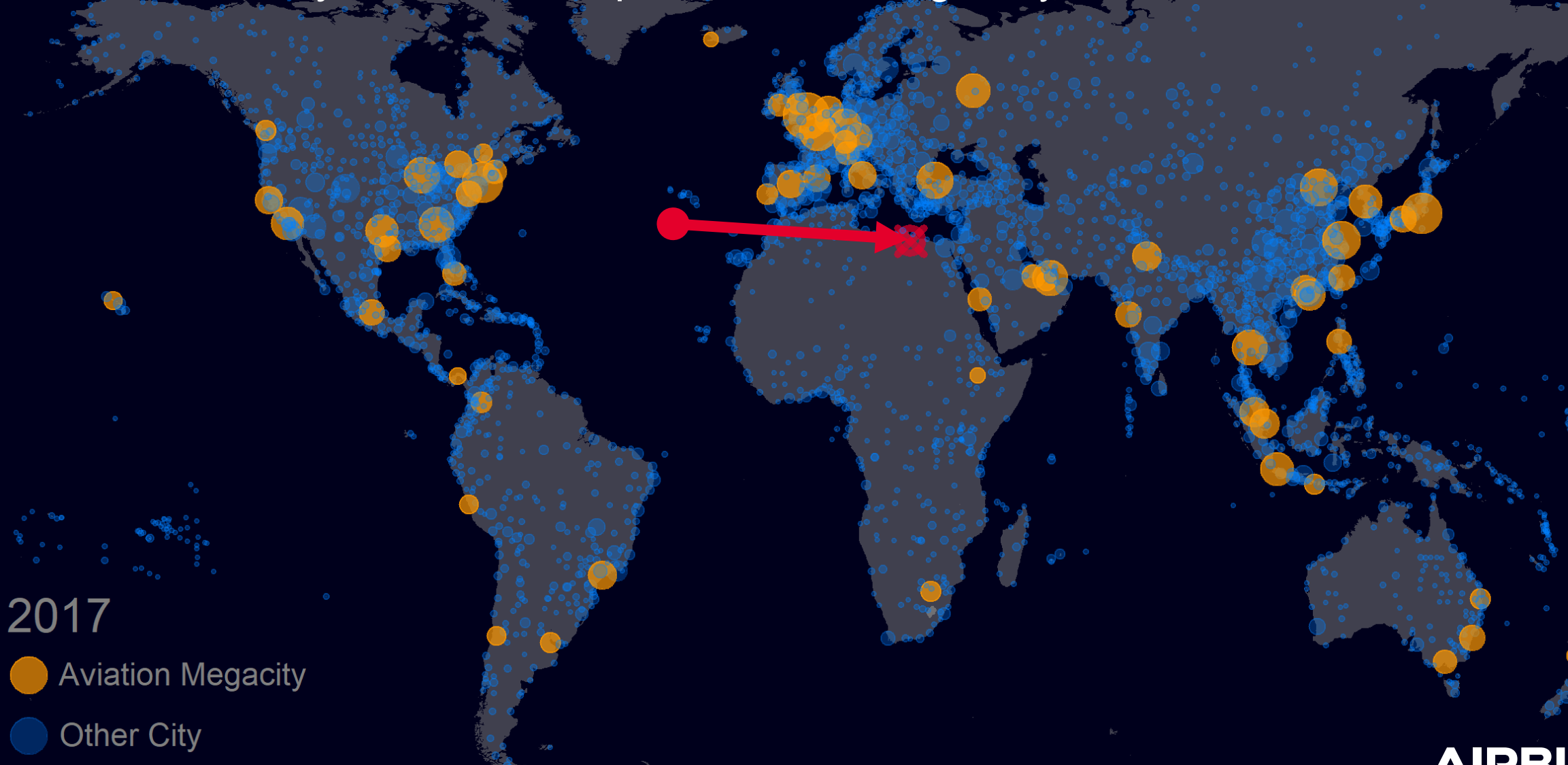
GMF 2018 results

Airbus product line

# 2017 in a nutshell...



Over the last 30 years, air transport's centre of gravity has moved south and east



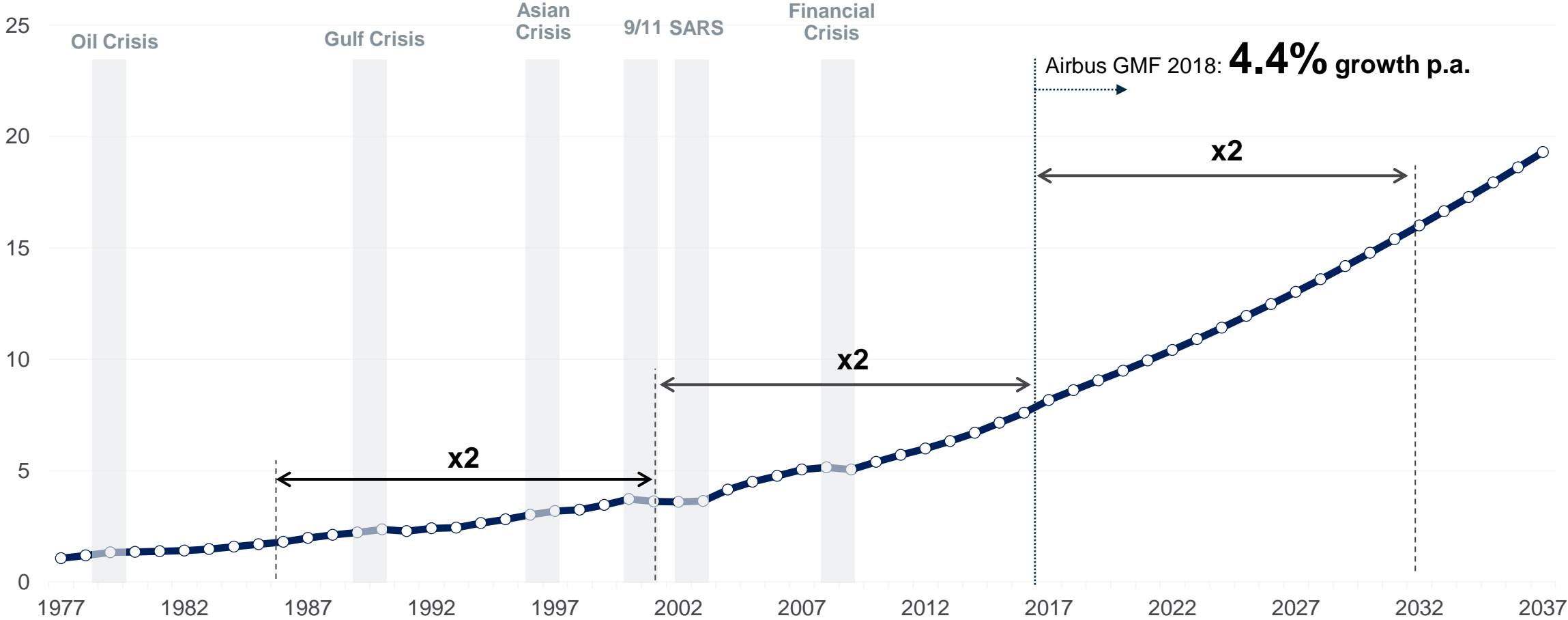
2017

- Aviation Megacity
- Other City

Source: Airbus GMF 2018

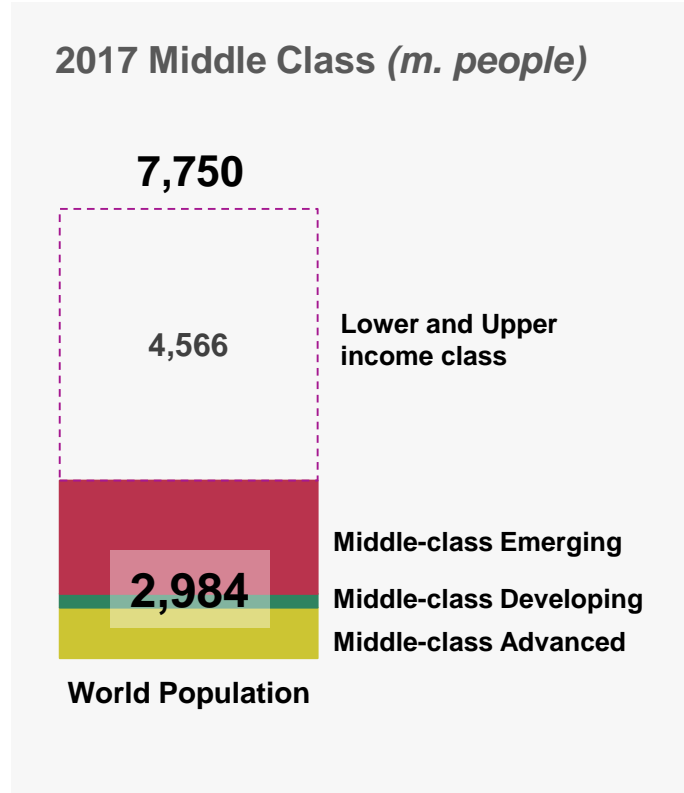
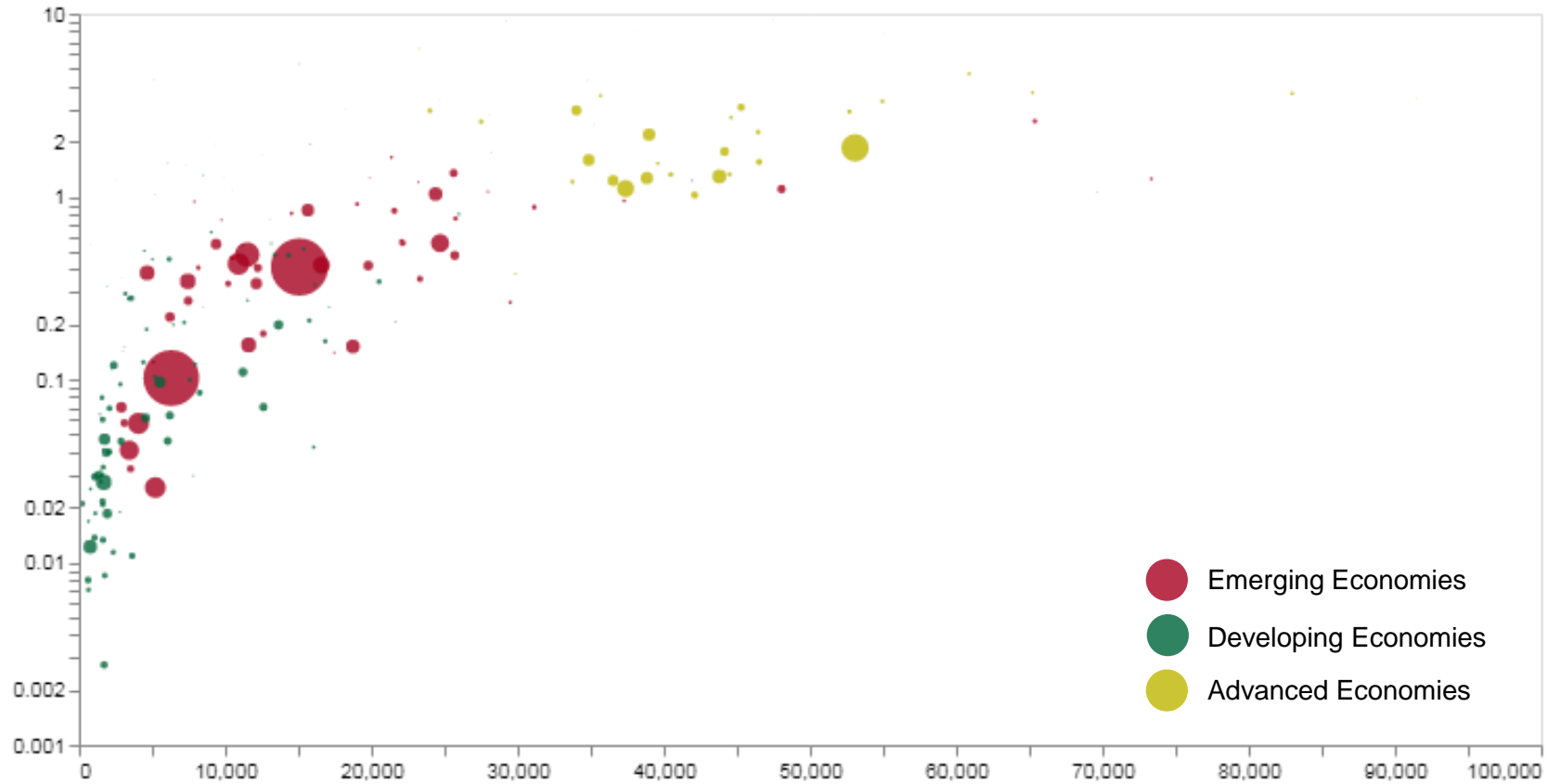
# Traffic has proven to be resilient to external shocks and doubles every 15 years

World annual traffic (trillion RPKs)



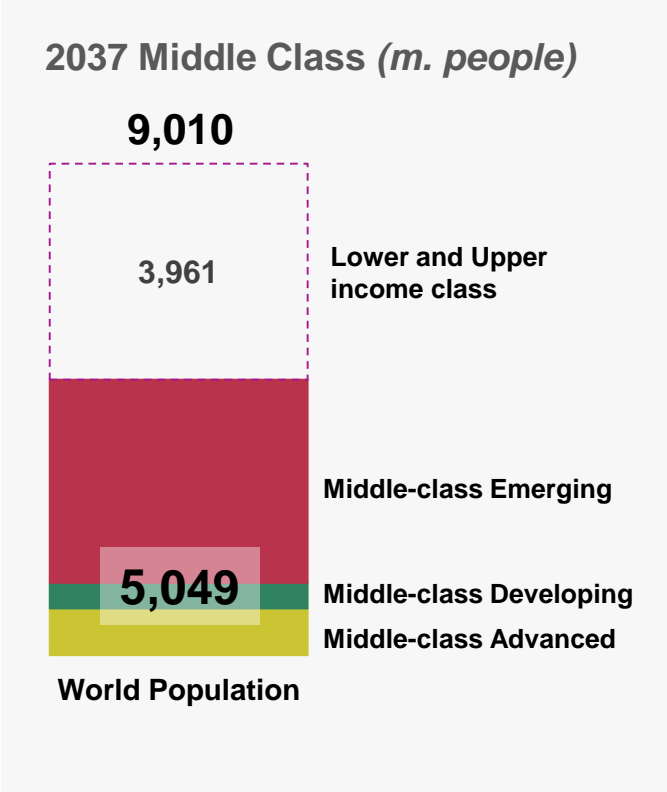
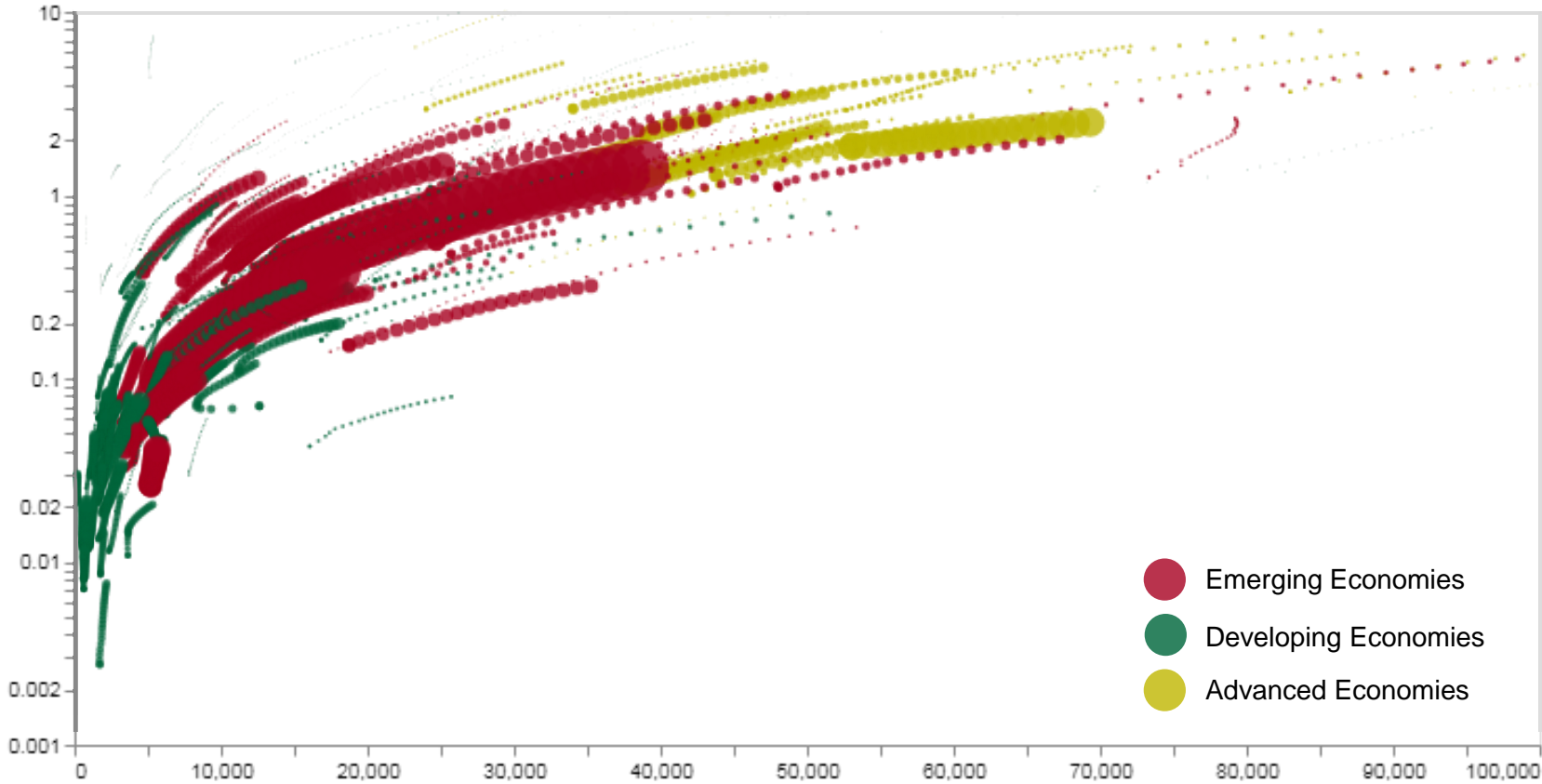
# In 2017, 30% of emerging country populations took a flight

2017 trips per capita (each bubble is a country)



# As middle-class develops, more people will access air travel...

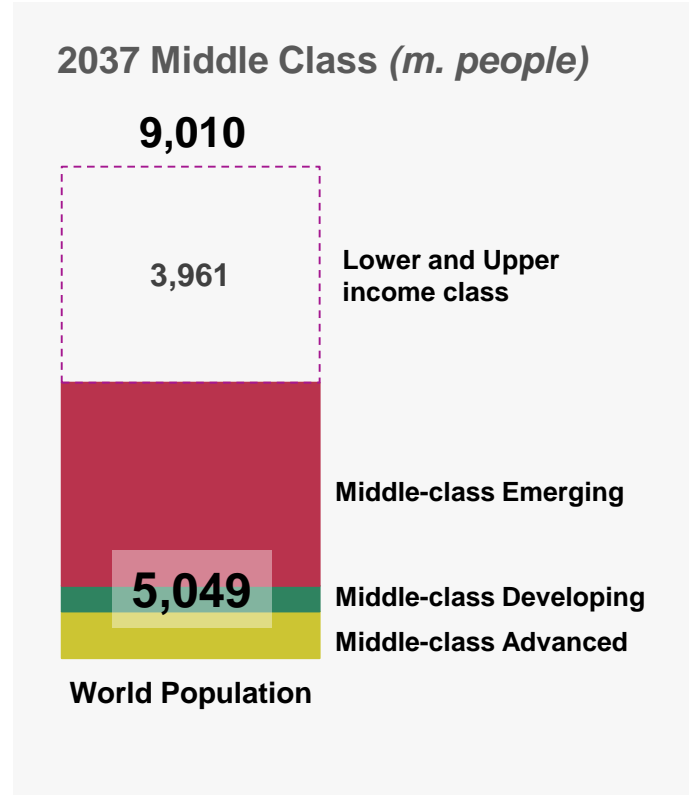
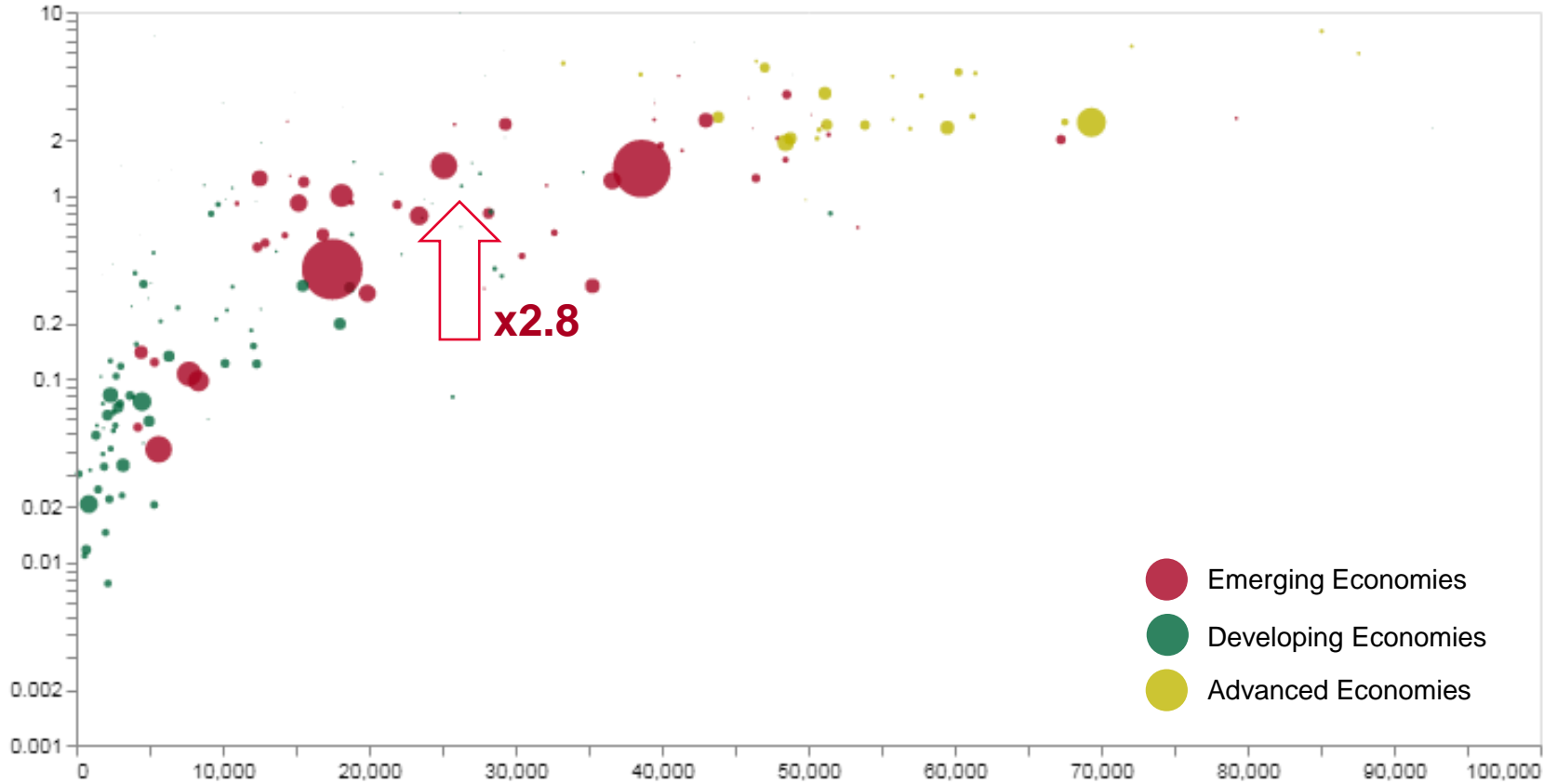
2017-2037 trips per capita (each bubble is a country)



real GDP per capita  
(2010 \$US at Purchasing Power Parity)

...and in 2037, ~85% of emerging country populations will fly

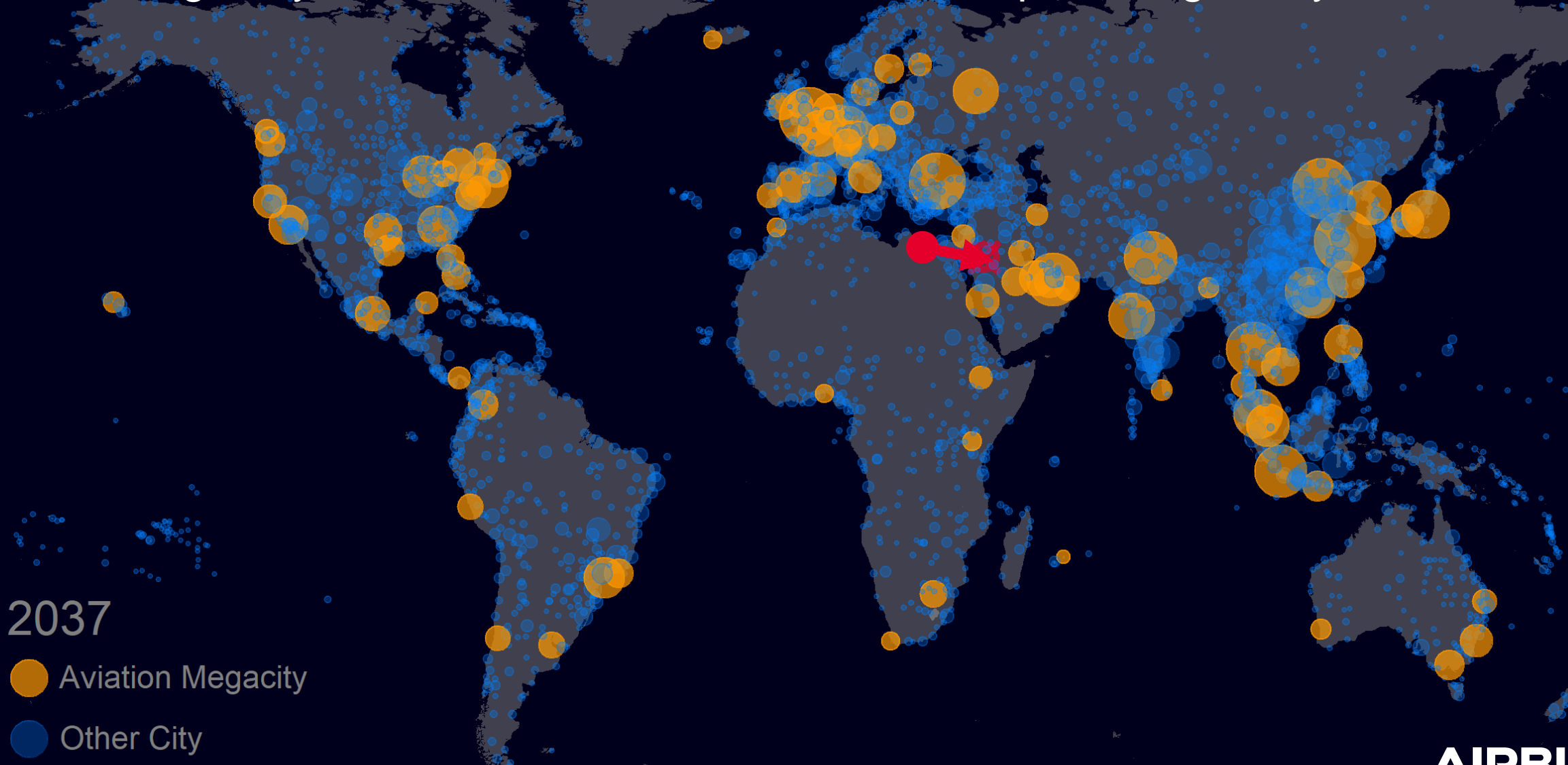
2037 trips per capita (each bubble is a country)



2037 real GDP per capita  
(2010 \$US at Purchasing Power Parity)



# Centre of gravity movement will slow as air traffic equalises globally



2037

- Aviation Megacity
- Other City

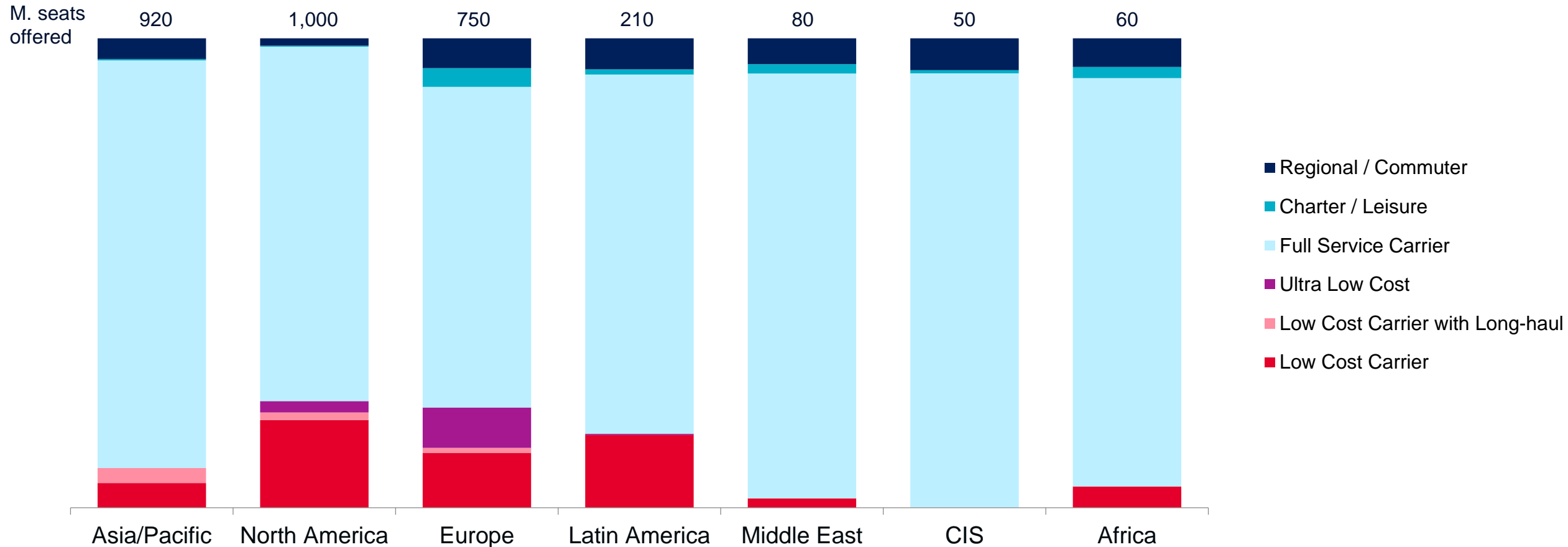
Source: Airbus GMF 2018



# Business models are evolving...

Share of each business model on Domestic and Intra-regional flights

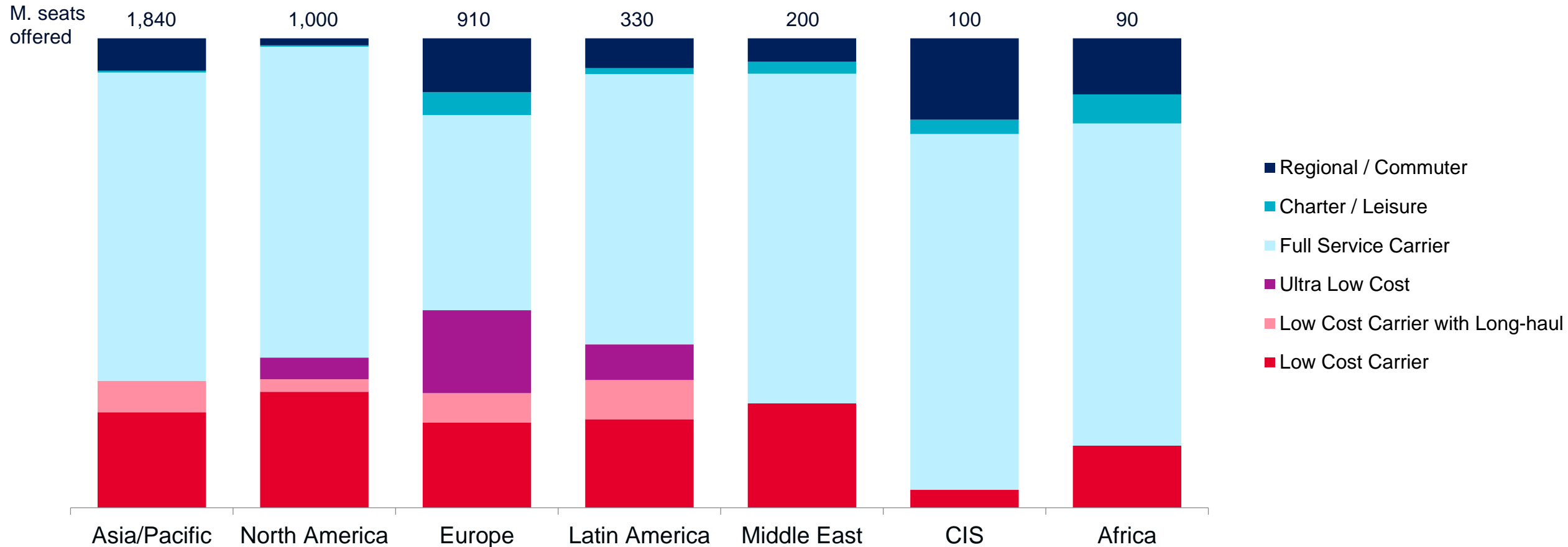
2007



# Business models are evolving...


Share of each business model on Domestic and Intra-regional flights

2017




... so are market segments

**S**



Capacity up to  
**230 seats**  
Range up to  
**3,000nm**

**M**



Capacity up to  
**300 seats**  
Range up to  
**5,000nm**

**L**



Capacity **up to**  
**350 seats**  
Range up to  
**10,000nm**

**XL**

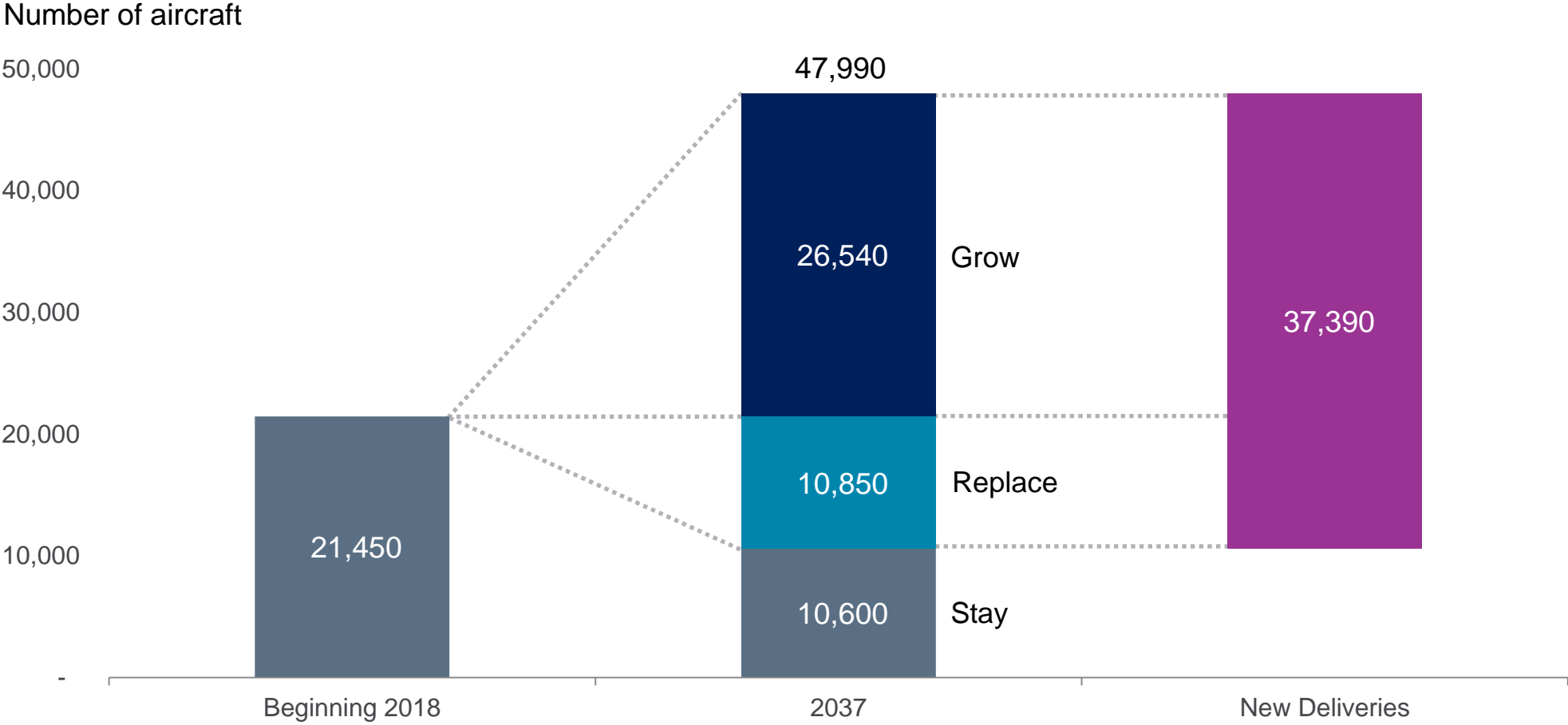


Capacity **above**  
**350 seats**  
Range up to  
**10,000nm**

# GMF18 anticipates an additional 2,500 new aircraft deliveries over 20 years

	GMF17	GMF18	
<b>GDP</b> 20-year avg. growth	2.8%	2.8%	+US\$ 2.9 trillion <i>at end of period</i>
<b>RPK</b> 20-year avg. growth	4.4%	4.4%	+2.4 trillion RPK <i>at end of period</i>
start <b>FLEET</b>	20,500	21,500	+1,000
end <b>FLEET</b>	42,530	47,990	+5,460
20-year NEW <b>DELIVERIES</b>	34,900	37,400	+2,500

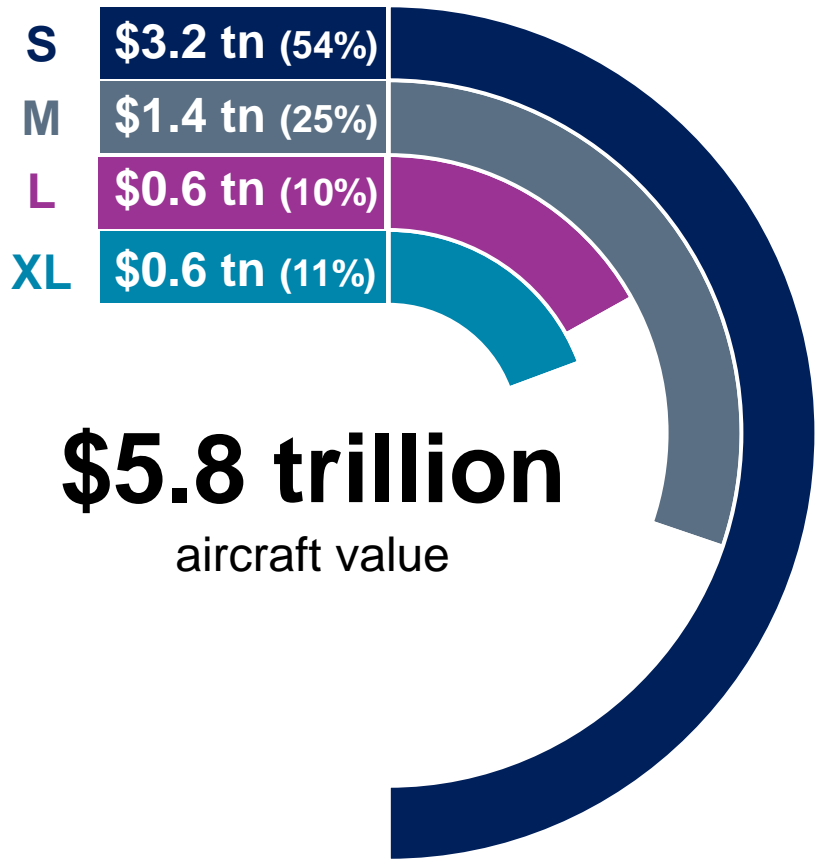
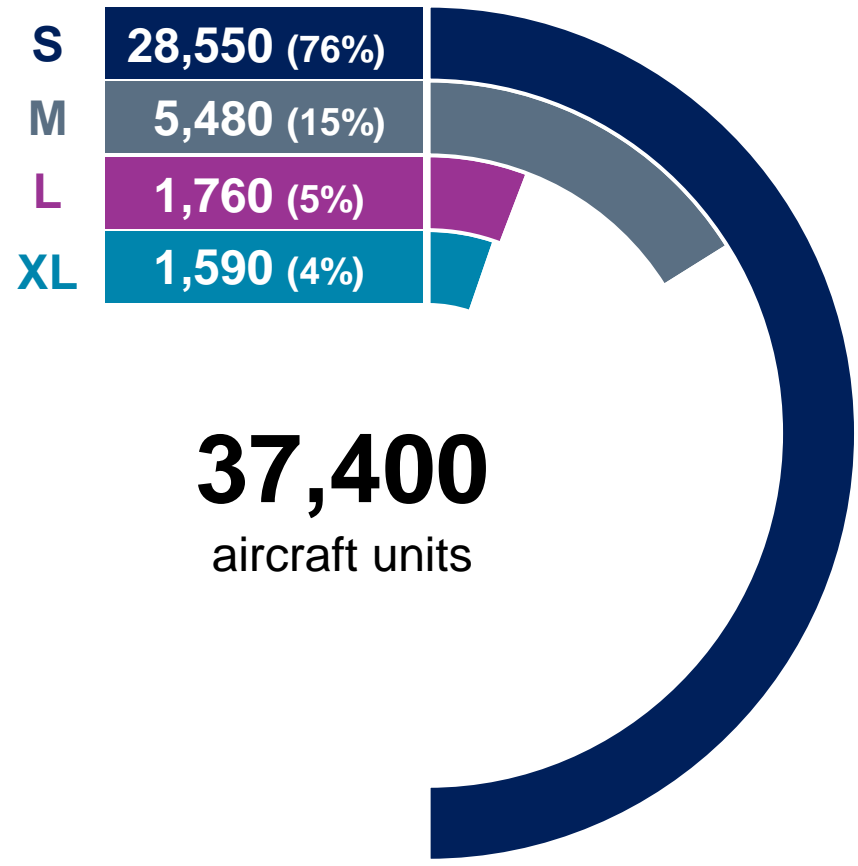
# The world fleet will more than double over the next 20 years



Notes: Passenger aircraft (≥ 100 seats) | Jet freight aircraft (>10 tonnes), Rounded figures to the nearest 10  
\* Assuming same rules as today  
Source: Airbus GMF 2018

# Around 37,400 aircraft will be required over the next 20 years


2018-2037 new deliveries



Notes: Passenger aircraft (≥ 100 seats) | Jet freight aircraft (>10 tons)  
Source: Airbus GMF 2018


# Airbus meeting market requirements

**S**



Capacity up to  
**230 seats**  
Range up to  
**3,000nm**

**M**



Capacity up to  
**300 seats**  
Range up to  
**5,000nm**

**L**



Capacity **up to**  
**350 seats**  
Range up to  
**10,000nm**

**XL**



Capacity **above**  
**350 seats**  
Range up to  
**10,000nm**

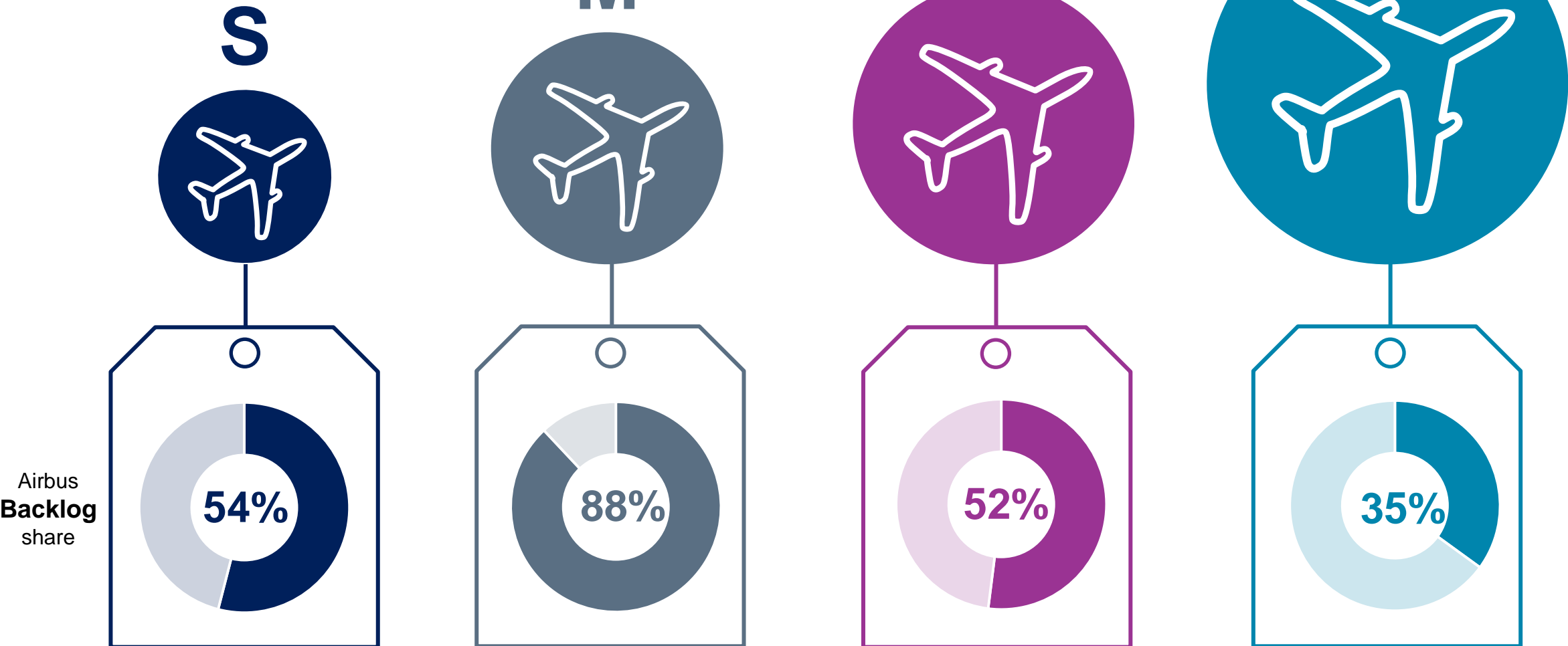








# Airbus Backlog share is 54% overall



Airbus Backlog share

# Our growing Single-Aisle Family

S



## EFFICIENCY

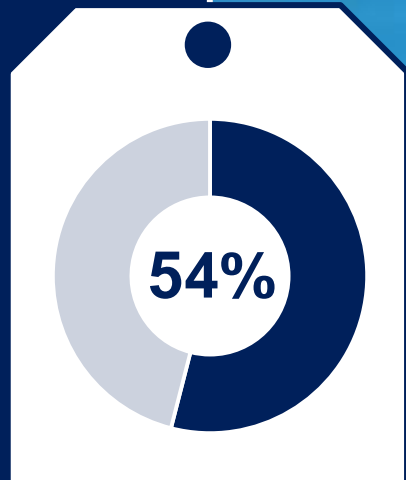
Full market coverage from 100 to 240 seats and up to 4,000nm

## COMFORT

The most Spacious and Innovative cabins in their market segments with 18"+ wide seats

## PROFITABILITY

20% Lower Fuel burn - Latest technologies embodied with further innovation cross-fertilization opportunities



Airbus  
Backlog  
share

# A321LR & A330neo commonality benefits

M



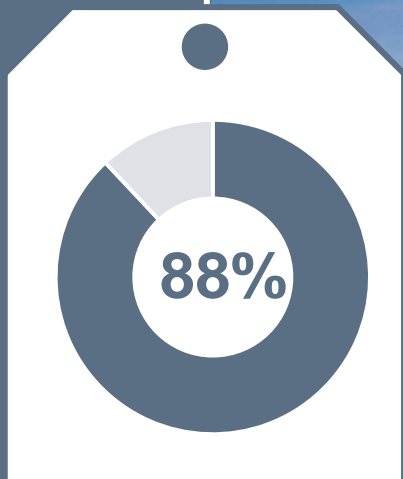
Unique Airbus Family commonality ~ 48 airlines operate already A321 & A330

Future proof new generation technology

25-30% lower fuel burn than previous generation

Airspace passenger experience

Airbus Backlog share



# Shaping the future of air travel

# A350XWB



Airbus  
Backlog  
share

A flexible, high-value Family



Airspace: Perfect place for passengers and airlines



All-new design delivering unrivalled levels of efficiency



**AIRBUS**

# A380 & A350-1000 the best aircraft to capture growing traffic

## XL



Air traffic **doubles** every **15** years

**90%+** of long-haul passengers travel through **65** cities



# Agenda



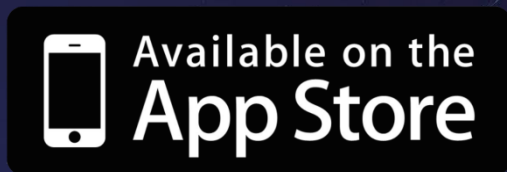
2017 in a nutshell

Growth drivers

GMF 2018 results

Airbus product line

# The Airbus Global Market Forecast App



© **AIRBUS** (Airbus S.A.S., Airbus Operations S.A.S., Airbus Operations GmbH, Airbus Operations LDT, Airbus Opeartions SL, Airbus China LTD, Airbus (Tianjin) Final Assembly Company LTD, Airbus (Tianjin) Delivery Centre LTD). All rights reserved. Confidential and proprietary document. This document and all information contained herein is the sole property of AIRBUS. No intellectual property rights are granted by the delivery of this document or the disclosure of its content. This document shall not be reproduced or disclosed to a third party without the express written consent of AIRBUS S.A.S. This document and its content shall not be used for any purpose other than that for which it is supplied. The statements made herein do not constitute an offer. They are based on the mentioned assumptions and are expressed in good faith. Where the supporting grounds for these statements are not shown, AIRBUS S.A.S. will be pleased to explain the basis thereof. AIRBUS, its logo, A300, A310, A318, A319, A320, A321, A330, A340, A350, A380, A400M are registered trademarks.