Aviation connects and unites us!

Airbus Global Market Forecast 2021

Dubai – Nov 13th
Airbus expects a full recovery of air traffic between 2023 and 2025
Aviation economic benefits extend beyond our industry

- **$3.5 trillion contribution to annual global GDP (4%) and 87 million jobs**
- Support tourism industry, **over 10% of world GDP**, with many small countries over 25%
- **Connect small island** to essential business, education and health services overseas
- Carries **35% of World trade** in value

Source: ATAG, Airbus GMF 2021
GDP remains the fundamental long term driver for traffic growth

**World real GDP (billion 2015 USD)**

Source: IHS Markit, Airbus GMF
Traffic to reconnect to pre-crisis trend with 2 years shift

Annual RPK (billions)

Source: IHS, Airbus GMF
Strong industry track record on productivity improvement

- **Daily utilisation**: +2 hours/day
- **Average seats per flight**: +18 seats/flight
- **Load factor**: +13pp

Source: IATA, ICAO, Cirium, OAG, Airbus
Only 13% of 2019 fleet in service were new generation aircraft

Number of passenger aircraft in service*

<table>
<thead>
<tr>
<th>Year</th>
<th>1st generation** aircraft</th>
<th>2nd generation** aircraft</th>
<th>Previous generation** aircraft</th>
<th>1st + 2nd + previous generation** aircraft</th>
<th>New generation** aircraft</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>5,000</td>
<td>10,000</td>
<td>15,000</td>
<td>20,000</td>
<td>25,000</td>
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<tr>
<td>2005</td>
<td>6,000</td>
<td>12,000</td>
<td>18,000</td>
<td>24,000</td>
<td>30,000</td>
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<tr>
<td>2010</td>
<td>7,000</td>
<td>14,000</td>
<td>20,000</td>
<td>28,000</td>
<td>35,000</td>
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<tr>
<td>2015</td>
<td>8,000</td>
<td>16,000</td>
<td>22,000</td>
<td>32,000</td>
<td>40,000</td>
</tr>
<tr>
<td>2019</td>
<td>9,000</td>
<td>18,000</td>
<td>24,000</td>
<td>36,000</td>
<td>45,000</td>
</tr>
</tbody>
</table>

Source: Cirium, Airbus
* Western built passenger aircraft above 100 seats – pax aircraft only
**1st generation: A300, DC 9, DC10, 707, 727, 737, 747 / 2nd generation: A310, MD11, MD80, MD90,37, 747, 757, 767, 787, F100
Demand for some 39,000 aircraft over the next 20 years

Fleet in service (thousands)

Notes: Passenger aircraft (≥100 seats) & Freight (>10t) | Rounded figures to nearest 10
Source: Airbus GMF 2021
Out of the 2021-2040 demand, 76% is for small aircraft category

<table>
<thead>
<tr>
<th>SMALL</th>
<th>MEDIUM</th>
<th>LARGE</th>
</tr>
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<tbody>
<tr>
<td>29,690</td>
<td>5,340</td>
<td>3,990</td>
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<tr>
<td>76% share of total new del.</td>
<td>14% share of total new del.</td>
<td>10% share of total new del.</td>
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</table>

Jet Passenger aircraft >=100 seats and Freighter >=10 tons
Source: Airbus Market Forecasts
Note: demand for all commercial aircraft above 100 seats & freighters above 10t
The freighter fleet will reach almost 3,000 aircraft by 2040

Freighter fleet in service evolution

Note: Jet freighter aircraft, payload > 10ton
Source: Airbus GMF21
World demand for ~2,440 freighter aircraft 2021-2040

1,000 small freighters
900 mid size freighters
540 large freighters

Note: Jet freighter aircraft, payload > 10 ton
Source: Airbus GMF
39,000 deliveries
New gen aircraft with 25% lower carbon footprint

- **A320 FAMILY**
- **A330 neo**
- **A350-1000**
- **A220**
- **A321 XLR**
- **A350-900**

**SMALL** **MEDIUM** **LARGE**

AIRBUS