

**John Leahy**  
Chief Operating Officer, Customers

# Airbus Annual Press Conference

13 January 2014



# A year of new industry records

	2013 result	Previous records
Airbus orders	<b>1,619</b> gross	1,608 (Airbus 2011) 1,458 (Airbus 2007)
	<b>1,503</b> net	1,419 (Airbus 2011) 1,413 (Boeing 2007)
Airbus year-end backlog	<b>5,559</b> aircraft	4,682 (Airbus 2012)
Airbus Deliveries	<b>626</b> aircraft	648 (Boeing 2013)

## Airbus records

—  
**Orders**

**Deliveries**

**Backlog**

# 2013 Airbus firm orders

End November			1,408 gross	1,314 net
Dec 2	Undisclosed	A319/A320/A321(CEO and NEO)	60	
2	Undisclosed	A320 (CEO and NEO)	40	
4	Undisclosed	ACJ320	1	
10	United	A319/A320ceo		-12
17	Z/C Aviation Partners One LLC	A319	1	
18	Air Asia X	A330-300	25	
19	Undisclosed	A330-200	4	
20	Air Caraibes	A350-1000	3	
20	Undisclosed	A320neo	20	
23	Emirates	A380	50	
31	Turkish Airlines	A321neo	7	
31	Kingfisher	A350-800/A380		-10

End December

**1,619 gross**

**1,503 net**

## 2013 Airbus sales

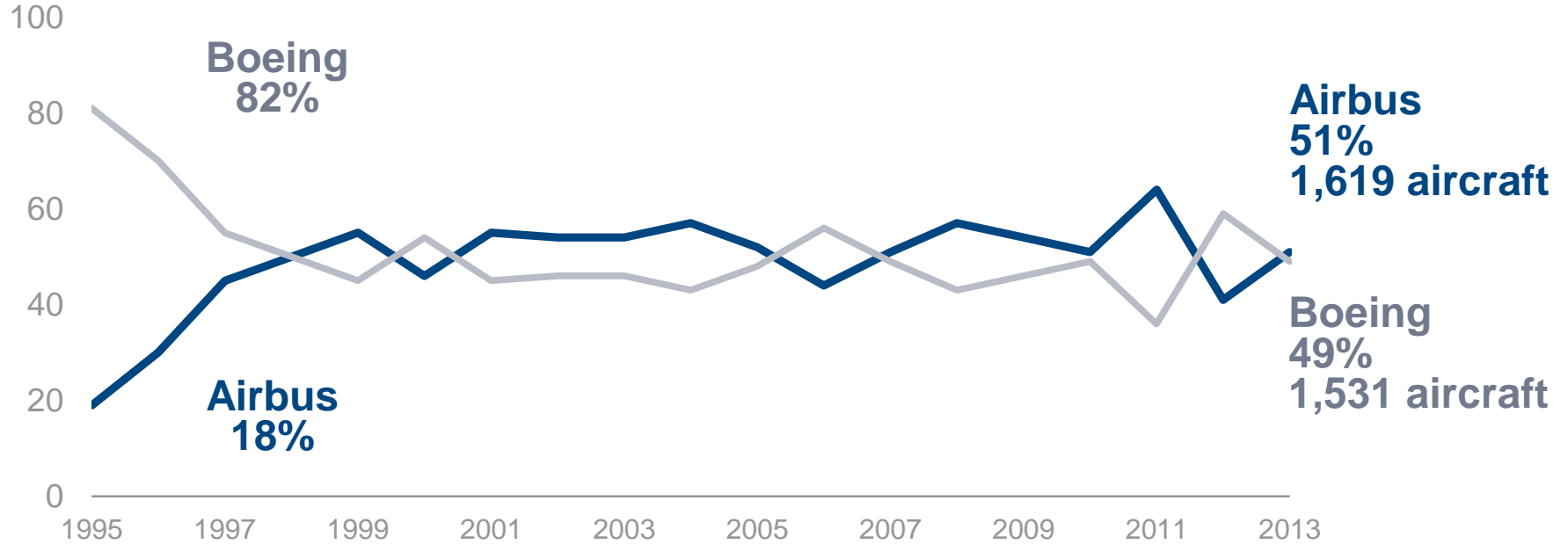
	<b>Gross</b>	<b>Net</b>
A320ceo	377	286
A320neo	876	876
A330-200 (incl Freighters)	18	10
A330-300	59	59
A350-900	180	179
A350-1000	59	59
A380	50	42
<b>TOTAL</b>	<b>1,619</b>	<b>1,503</b>

Firm orders

**2013**  
record year

# 2013 Airbus and Boeing world market share

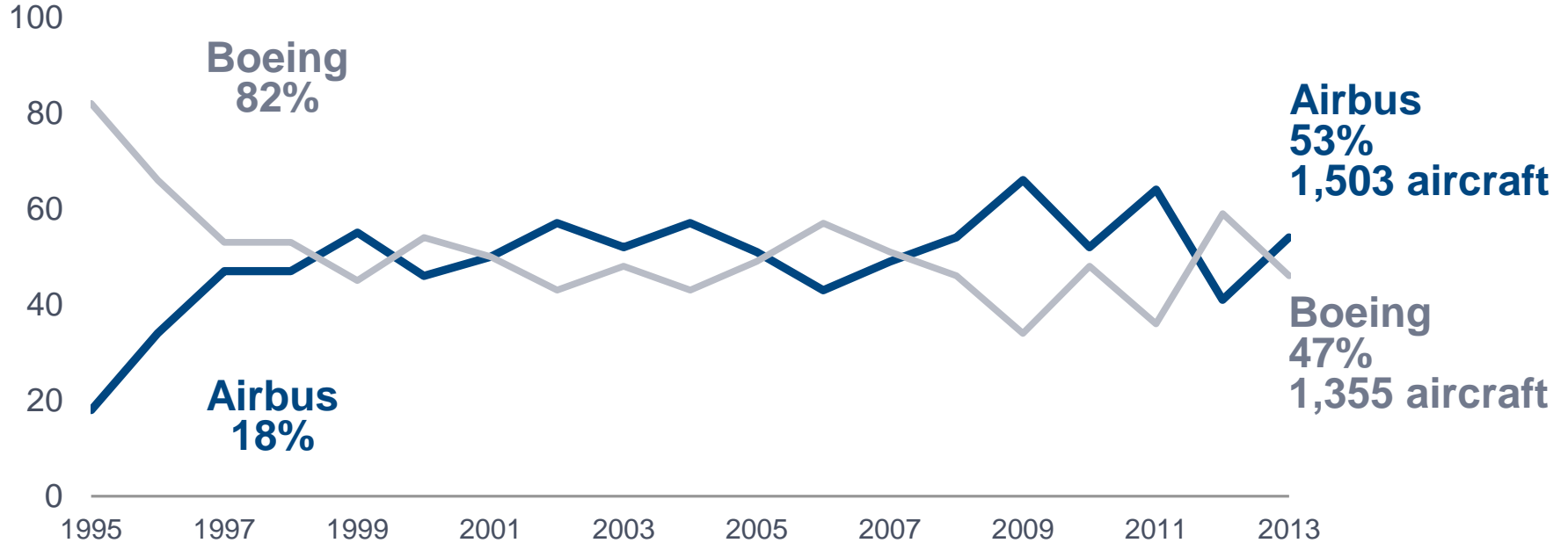
Gross order share since 1995



Data to end 2013

# 2013 Airbus and Boeing world market share

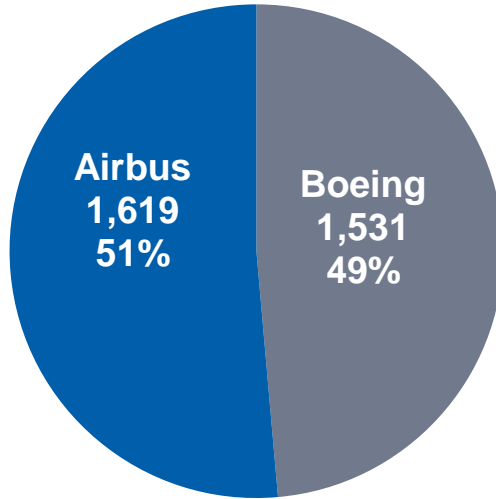
Net order share since 1995



Data to end 2013

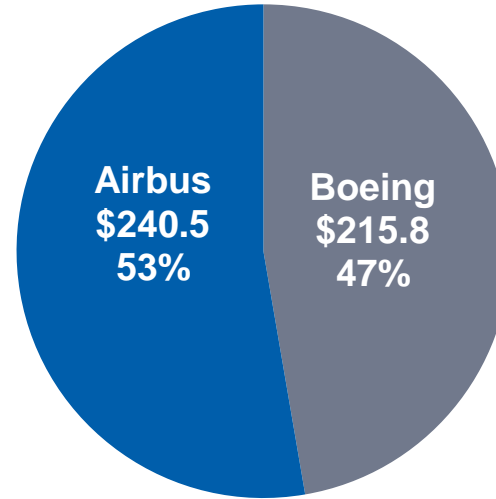
# 2013 gross market share

## Units



3,150 industry orders

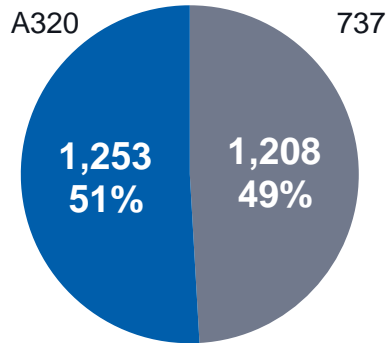
## Revenues



\$456.3bn industry

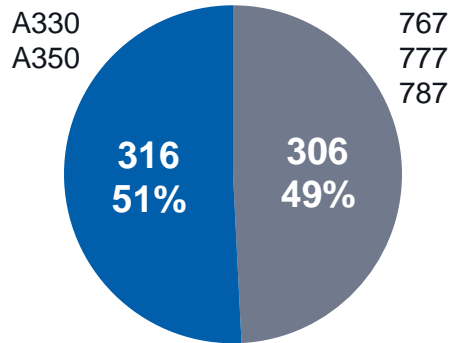
# 2013 market share by category - gross

**Single aisle**  
2,461 orders



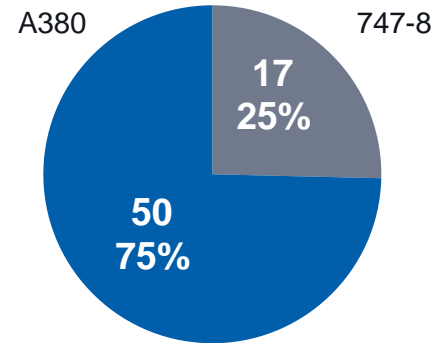
ACJ	4	57%
BBJ	3	43%
NEO	876	56%
MAX	699	44%

**Widebody**  
622 orders



A350	239	57%
787	183	43%

**VLA**  
67 orders

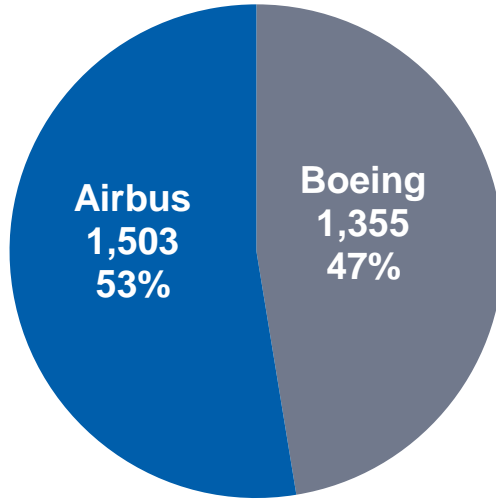


A380 pax	50	82%
747-8 pax	11	18%



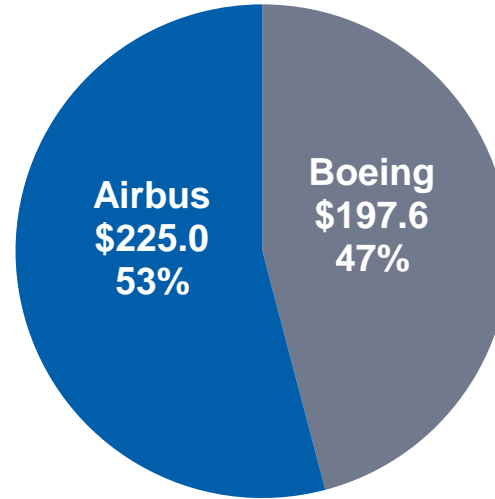
# 2013 net market share

## Units



2,858 industry orders

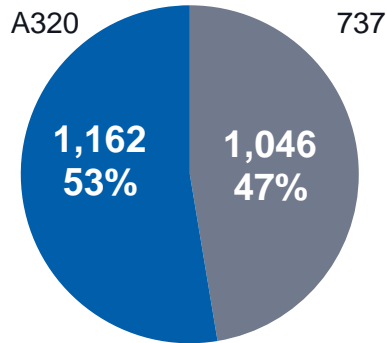
## Revenues



\$422.6bn industry

# 2013 market share by category - net

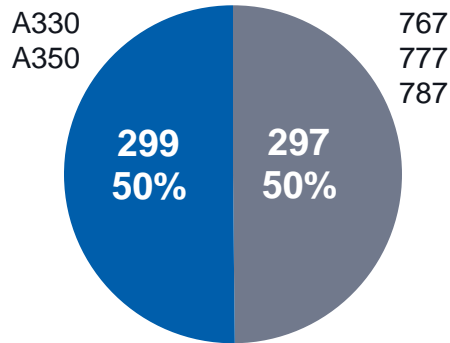
**Single aisle**  
2,208 orders



ACJ	1	25%
BBJ	3	75%

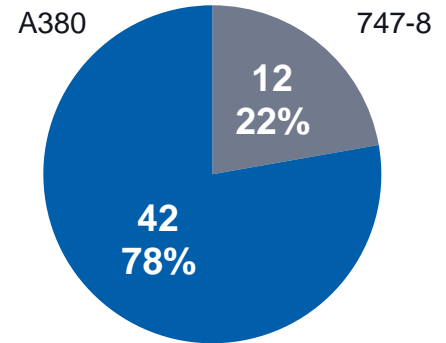
NEO	876	56%
MAX	699	44%

**Widebody**  
596 orders



A350	230	56%
787	182	44%

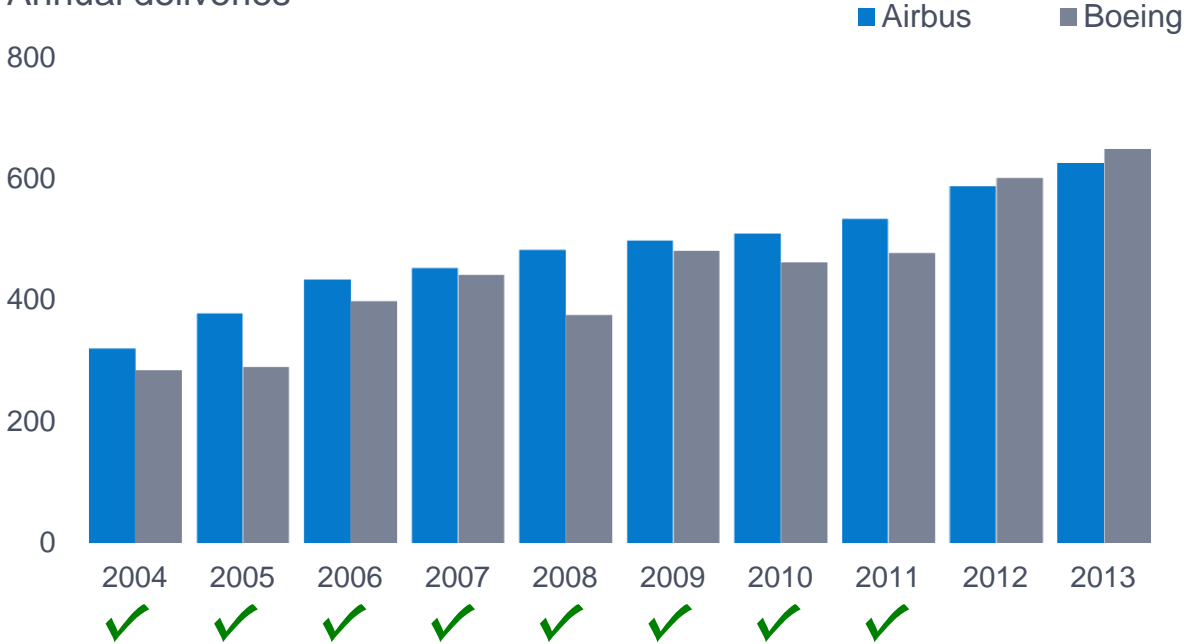
**VLA**  
54 orders



A380 pax	42	81%
747-8 pax	10	19%

# Delivery comparison over the last 10 years

Annual deliveries



2004-2011

**Airbus**  
delivered  
most aircraft

# Backlogs

	<b>Airbus</b>		<b>Boeing</b>
A320ceo	1,688	737NG	1,917
A320neo	2,610	737 MAX	1,763
A330	267	767	49
A350	812	787	916
		777 (incl 66 777X)	380
A380	182	747	55
<b>Total</b>	<b>5,559</b>	<b>Total</b>	<b>5,080</b>

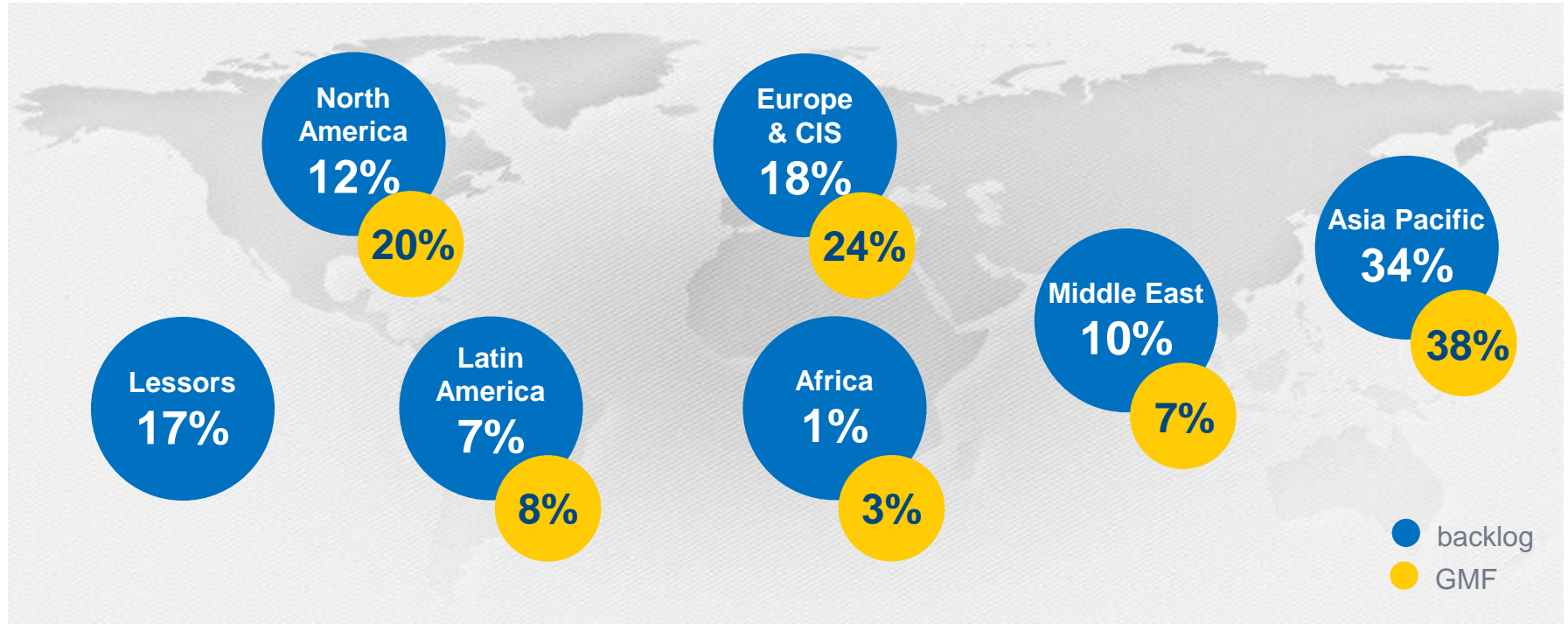
**Backlog**

**5,559**

**record  
industry  
backlog**

# 2013 Airbus order backlog by region

## Airbus backlog and GMF



Data to end 2013 . Corporate, MRTT less than 1%

1,253 new A320 Family orders in 2013. 876 A320neo, 377 A320ceo

**10,193**

**firm orders**

**5,895**

**deliveries**

**4,298**

**firm order  
backlog**

1,688 CEO  
2,610 NEO

**A320**

**Takes-off or lands  
every 2 seconds  
with 99.6%  
reliability**



# A320neo: Featuring new engines and Sharklets



## **A320neo**

**15% lower fuel  
burn, more range**

**Most comfortable  
single aisle**

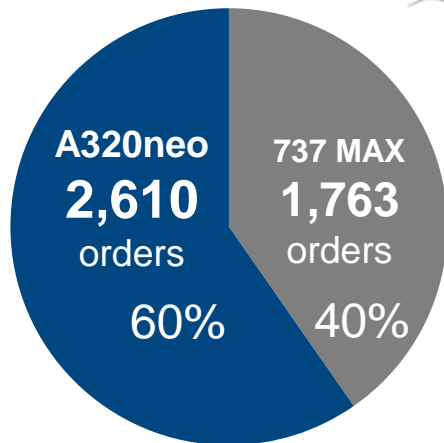
**High commonality  
with A320ceo**

# NEO leads the MAX in orders and customers



**48 customers\***

Including  
2 customers  
converting  
35 A320ceo



**22 identified  
customers**

Including  
9 customers  
converting  
159 737NG

**A320neo**

**60%**  
prefer  
A320neo



# A320neo is a better optimised aircraft

## 737NG

CFM56-7B

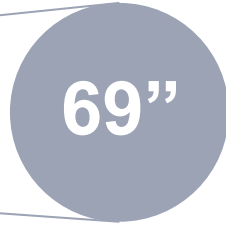


61"

## 737 MAX

Leap-1B

By pass ratio: 9



69"

OWE: +3.2 tonnes

## A320

CFM56-5B



68"

## A320neo

Leap-1A26 / PW1127G-JM

By pass ratio: 12



81"

OWE: +1.8 tonnes

**With equivalent specifications**

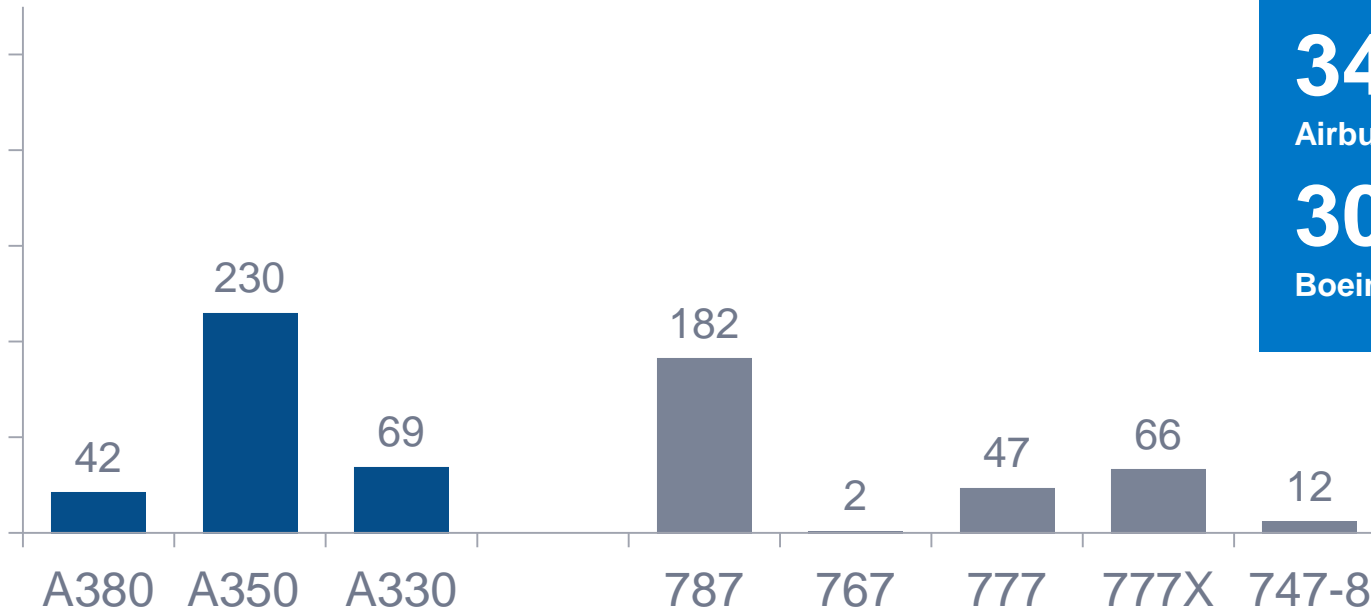
**A320 has the same OWE as 737-800W  
A320neo is 1.4 t lighter than 737 MAX 8**

# Airbus Widebody Family: matching market demand



# Wide-body sales in 2013

Net passenger and freighter wide-body orders in 2013



2013 orders

341

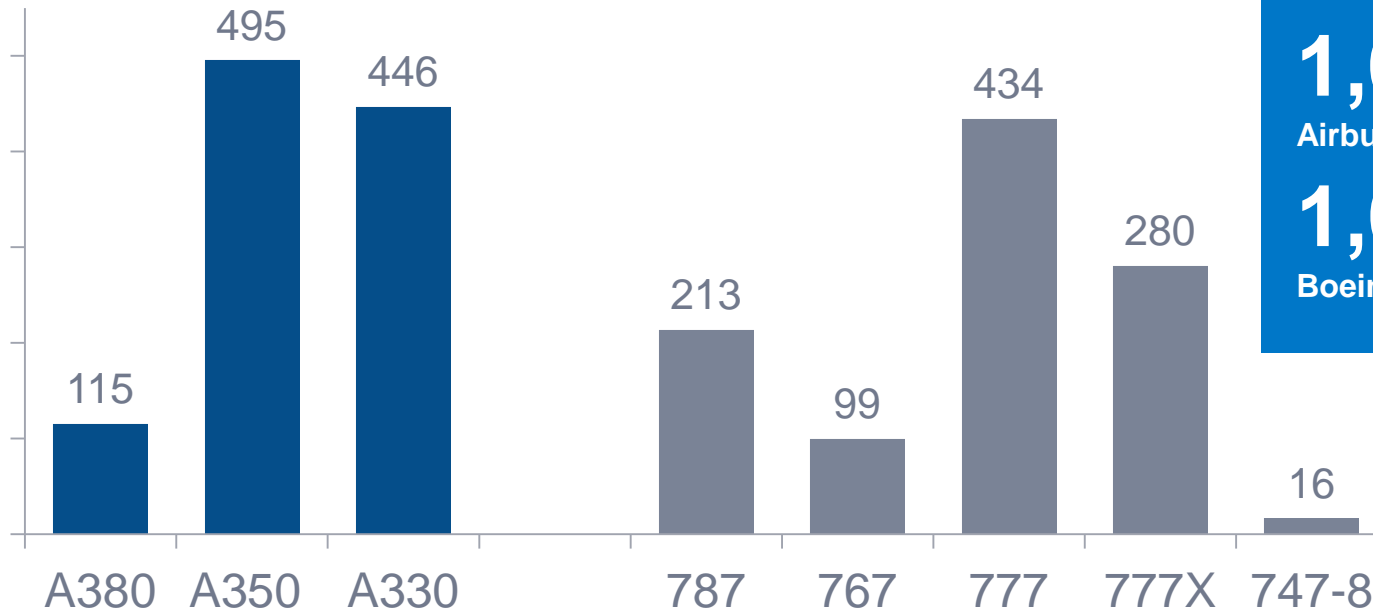
Airbus wide-body

309

Boeing wide-body

# Airbus leads Boeing in wide-body sales

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



**Orders since 2008**

---

**1,056**  
Airbus wide-body

**1,042**  
Boeing wide-body

Net orders from Jan 2008 to end 2013

# 77 new A330 Family orders in 2013

1,313

firm orders

1,046

deliveries

267

backlog

A330

Takes-off or lands  
every 22 seconds  
with 99.0%  
reliability



Commercial data to end 2013 In-Service data August 2013

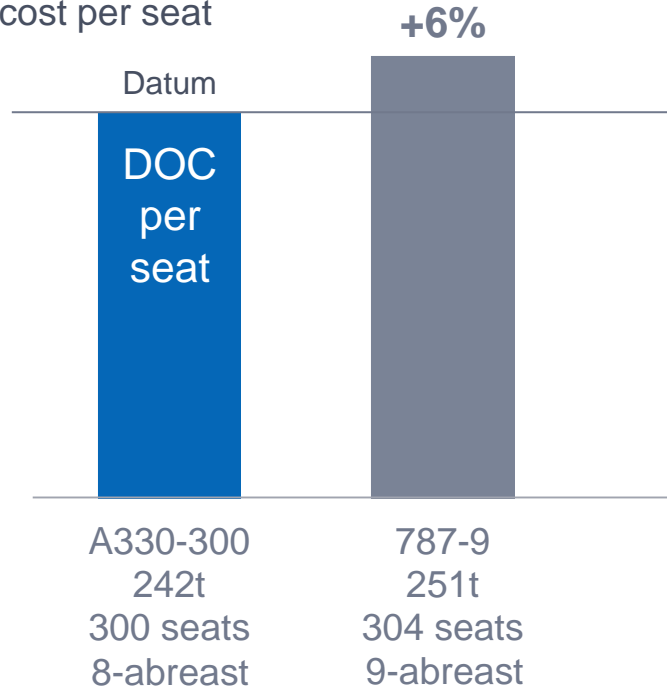
242 tonne A330-300



# A330 cost efficiency in long range configuration

2,000 nm sector

Direct operating cost per seat



A330 242 tonnes

**Lower  
cost than  
the 787**

Assumptions. All layouts to equivalent comfort standard. 2000nm sector, JAR 3%, 200nm diversion, fuel price 3 US\$/Usg. Engine thrust for A330-300 at 199t = 68k – GE powered. Same delta improvement on engine re-rate assumed on 787-9 as A330-300

# Making the A330 a successful Regional aircraft



## Lower operational weight

**MTOW - 199t**

other weights offered



## Optimized thrust

Engine rated at 68k lbs



## Up-to-date cabin

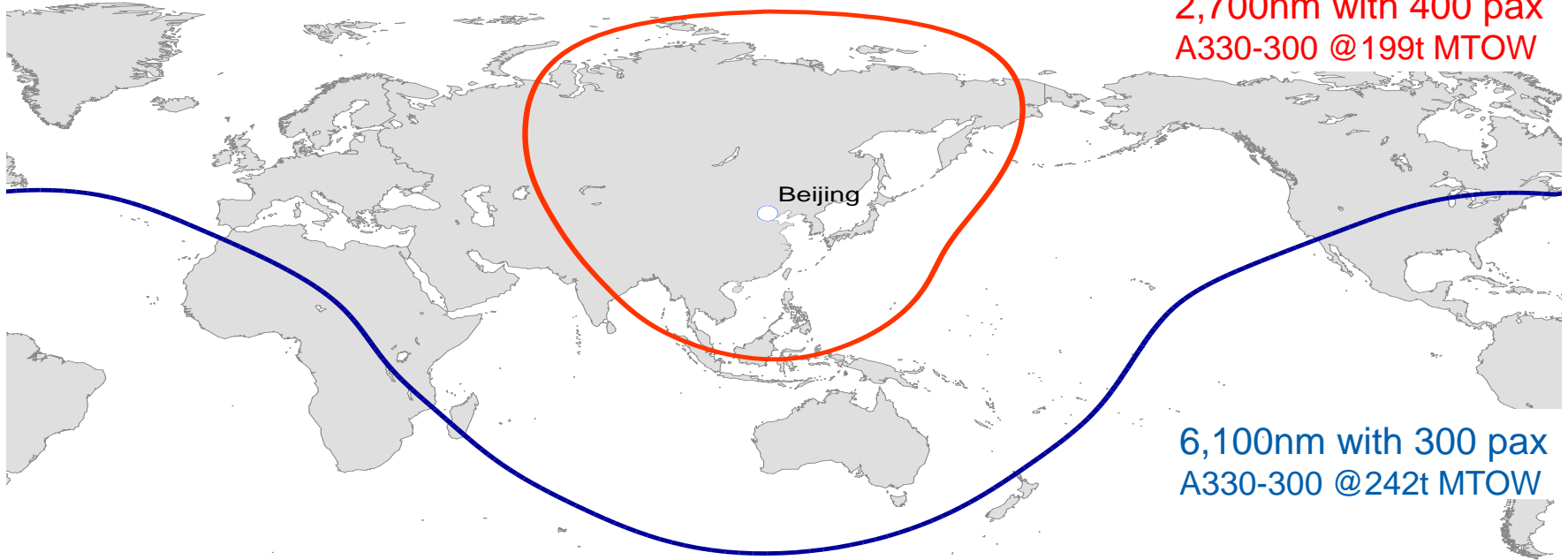
Tailored for shorter ranges

**A330 Regional**

**Lowest**  
cost per seat  
regional  
aircraft



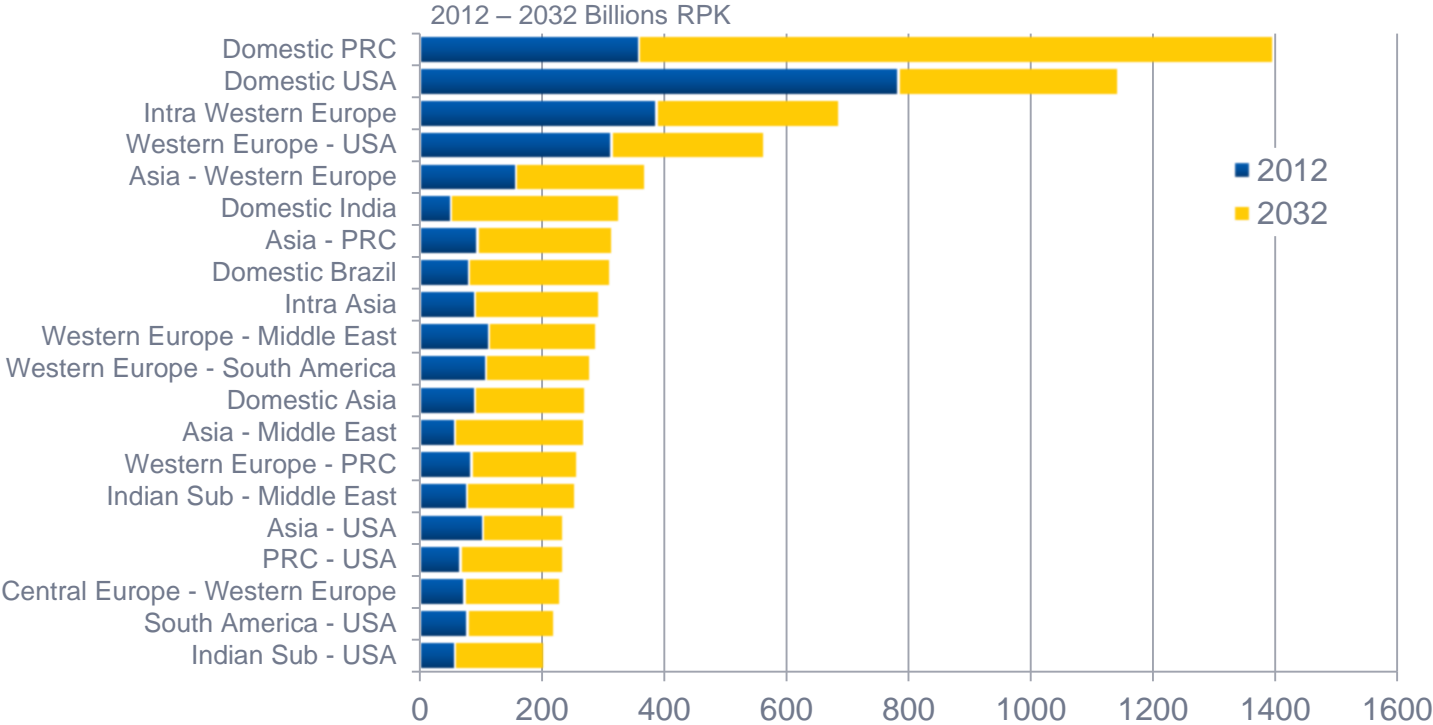
## A330 serving Asia's domestic and regional markets



## A330 versatility from long-haul to short-haul

Assumptions: JAR 3%, 200nm diversion. 85% annual reliability winds, 3% track allowance

# Domestic PRC will be the largest flow in 2032

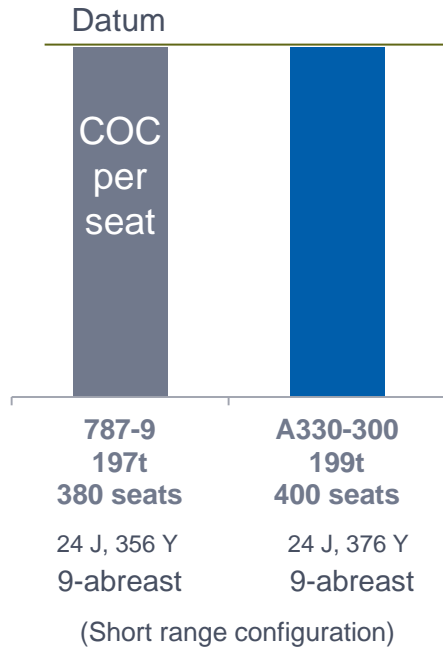


20-year CAGR
7.0%
1.9%
2.9%
3.0%
4.3%
9.8%
6.2%
7.0%
6.1%
4.8%
4.8%
5.7%
8.0%
5.7%
6.1%
4.2%
6.5%
5.9%
5.3%
6.6%

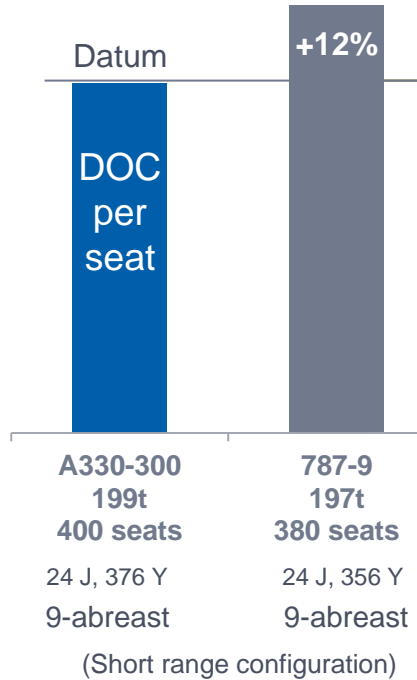
# A330-300 Regional: lowest cost per seat

2,000 nm sector

Cash operating cost per seat



Direct operating cost per seat



**A330 Regional**

**Lower  
cost than  
the 787**

Assumptions. All layouts to equivalent comfort standard. 2000nm sector, JAR 3%, 200nm diversion, fuel price 3 US\$/Usg, Airbus Standard Economic rules

Lease rates: 787-9 - \$1.25m A330-300 - \$900k

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# 239 new A350 XWB orders in 2013

812

firm orders

39

customers

812

backlog



# Japan Airlines places 31 firm orders, 25 options for the A350 XWB



**JAL**

**18 A350-900**  
**13 A350-1000**

**Order value \$9.5 bn**  
**replaces 777 fleet**

# A350 XWB strength in simplicity



**A350-1000**



**A350-900**



**A350-800**

Three models of  
latest generation aircraft

777-9  
777-300ER



777-8  
777-200LR



787-10



787-9



787-8



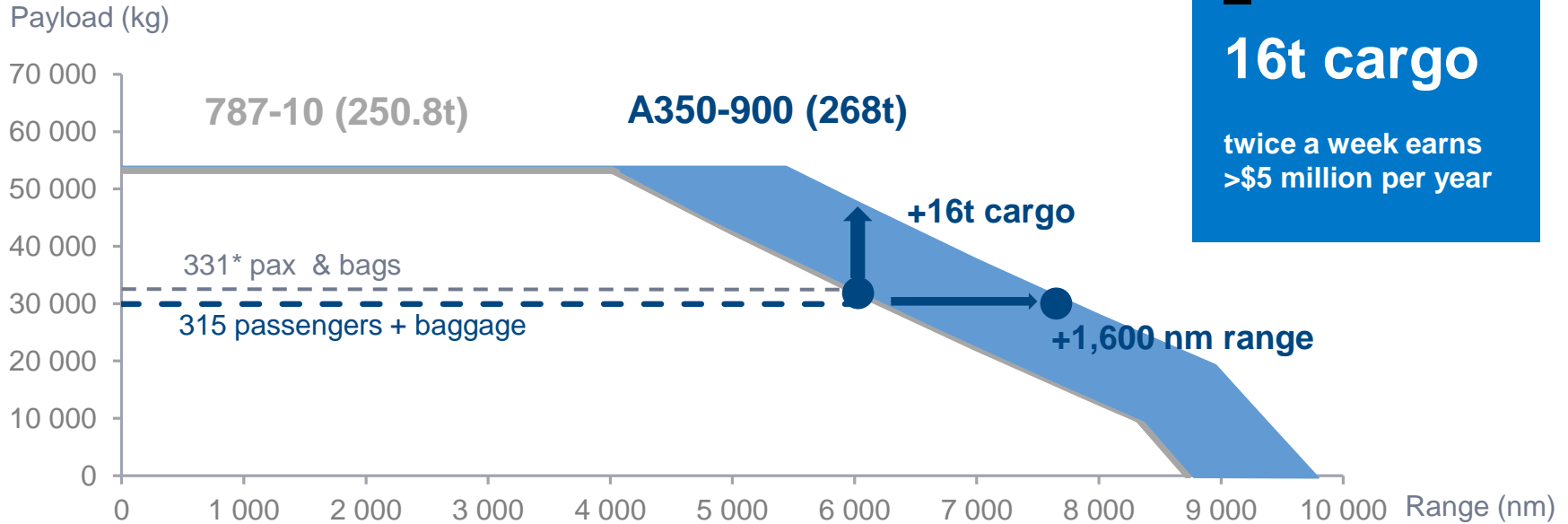
Seven models  
of different generations

**A350 XWB**

**Step ahead  
of 787**

**Generation  
beyond 777**

# A350-900 offers more revenue potential than 787-10



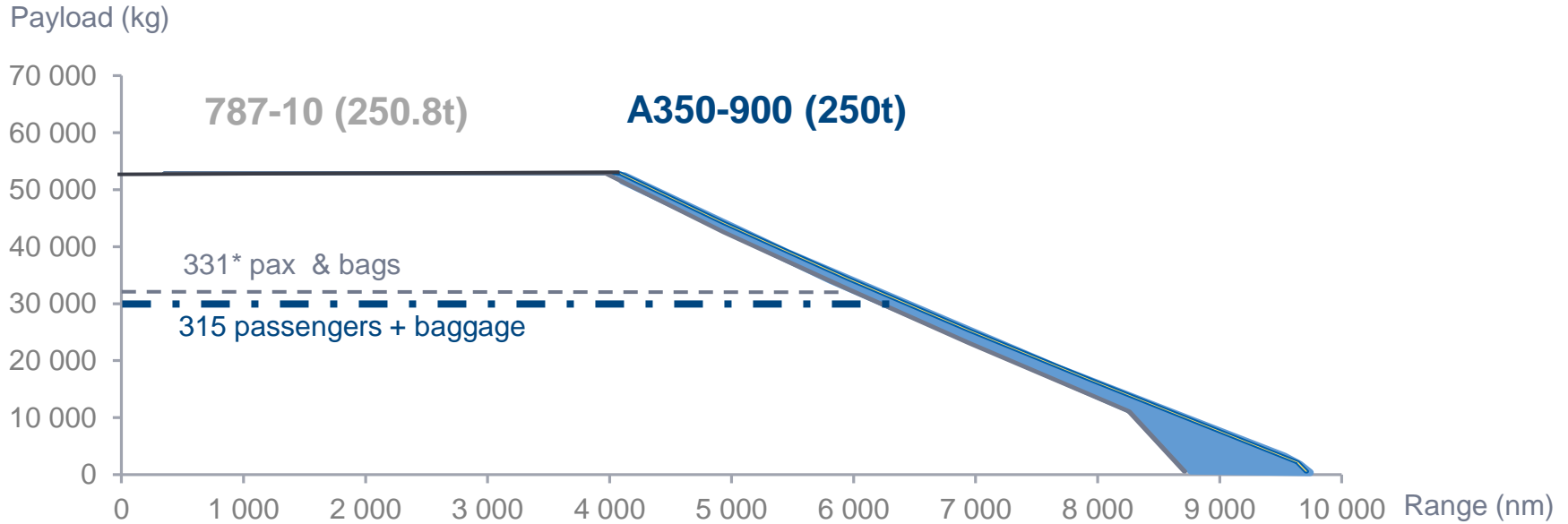
Long haul cargo

**16t cargo**

twice a week earns  
>\$5 million per year

Typical 2-class configurations with 48 J-class at 60-inch pitch, Typical airline flight profile and reserves, \* Airbus estimate

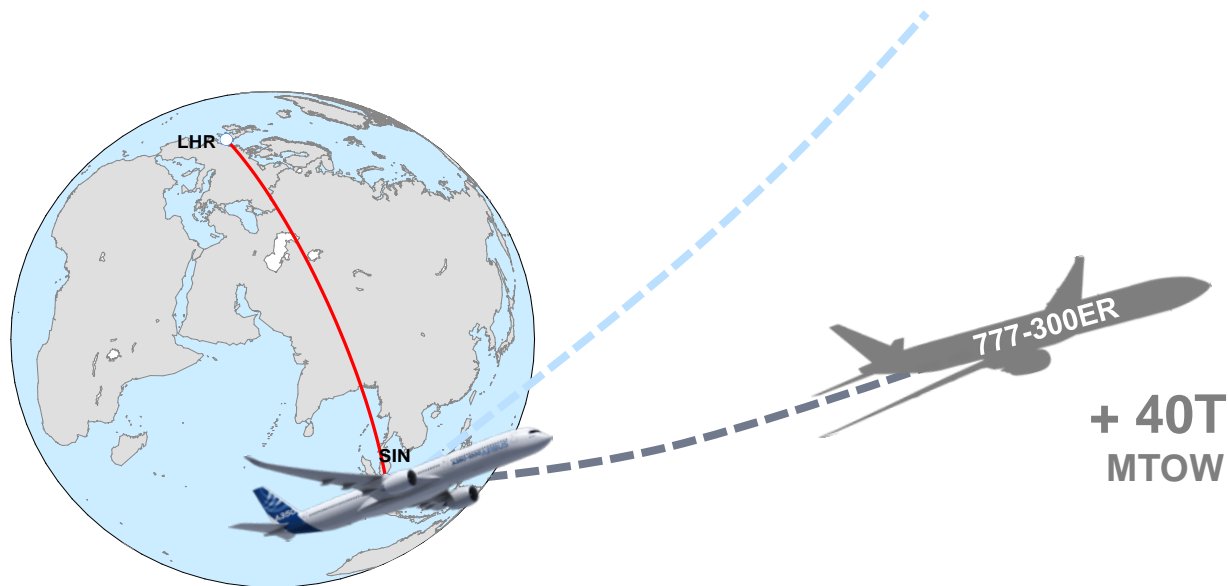
# A350-900 capability versus 787-10



Typical 2-class configurations with 48 J-class at 60-inch pitch, Typical airline flight profile and reserves, \* Airbus estimate



# Unrivalled A350-1000 efficiency – a step change in efficiency



**777-300ER**

**40t MTOW**

more than A350-1000

**20 t structure**  
**20 t fuel**

6,500 nm mission, 350 passengers

# A350-1000 vs. 777X.

777-9  
190t OWE



5<sup>th</sup> derivative

+15 t\*

777-300ER  
175t OWE



- 4-frame stretch
- Frame sculpting
- Bigger wing featuring Folding wings
- Engine upsize
- ...

-20 t

A350-1000  
155t OWE



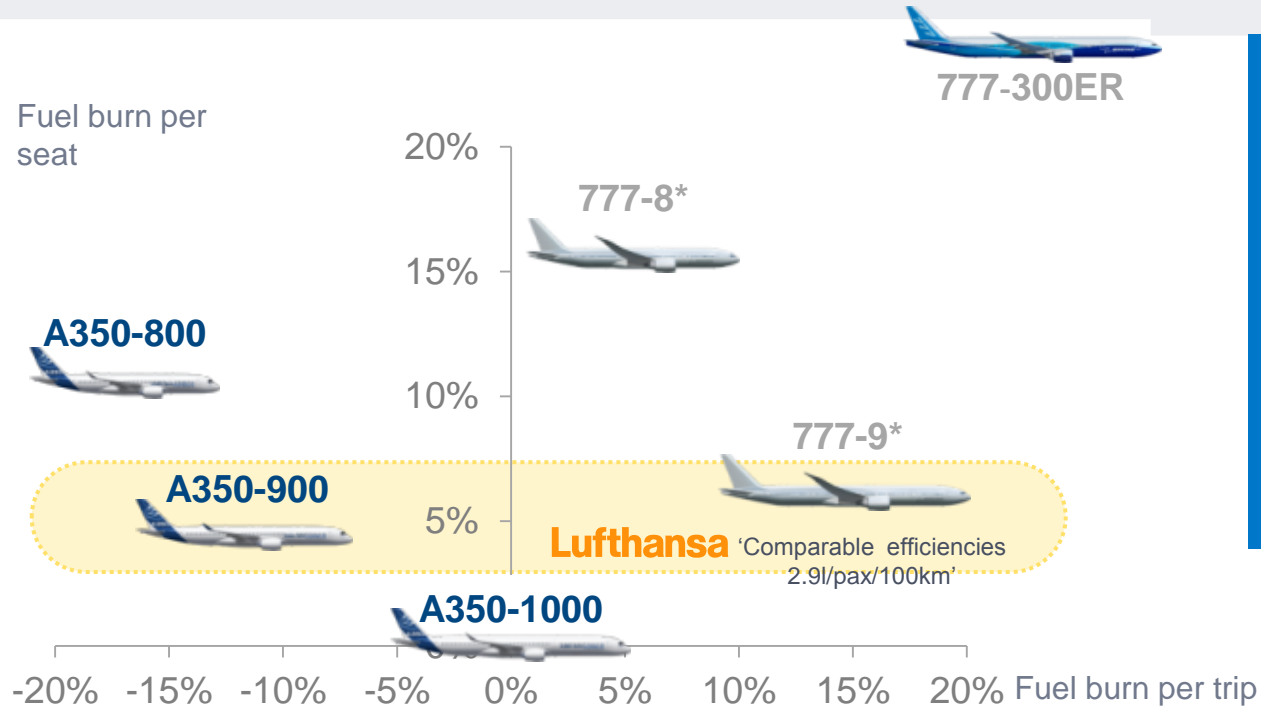
Clean sheet design

777-9 OWE

Up to 35t

heavier than a  
A350-1000 for  
35 more seats

# A350 XWB and 777 competitive position



Shaping efficiency

A350-900 unmatched fuel efficiency today

A350-1000 will be one step further

Typical airline rules : A350-900 at 315 seats, A350-1000 at 369 seats, 777-9X at 405 seats (10 abreast), 777-8X at 342 seats (10 abreast), 777-300ER at 365 seats (9 abreast), , (\*) Airbus estimate

# 50 new A380 orders in 2013

**304**

**firm orders**

**19**

**customers**

**182**

**backlog**

**A380**

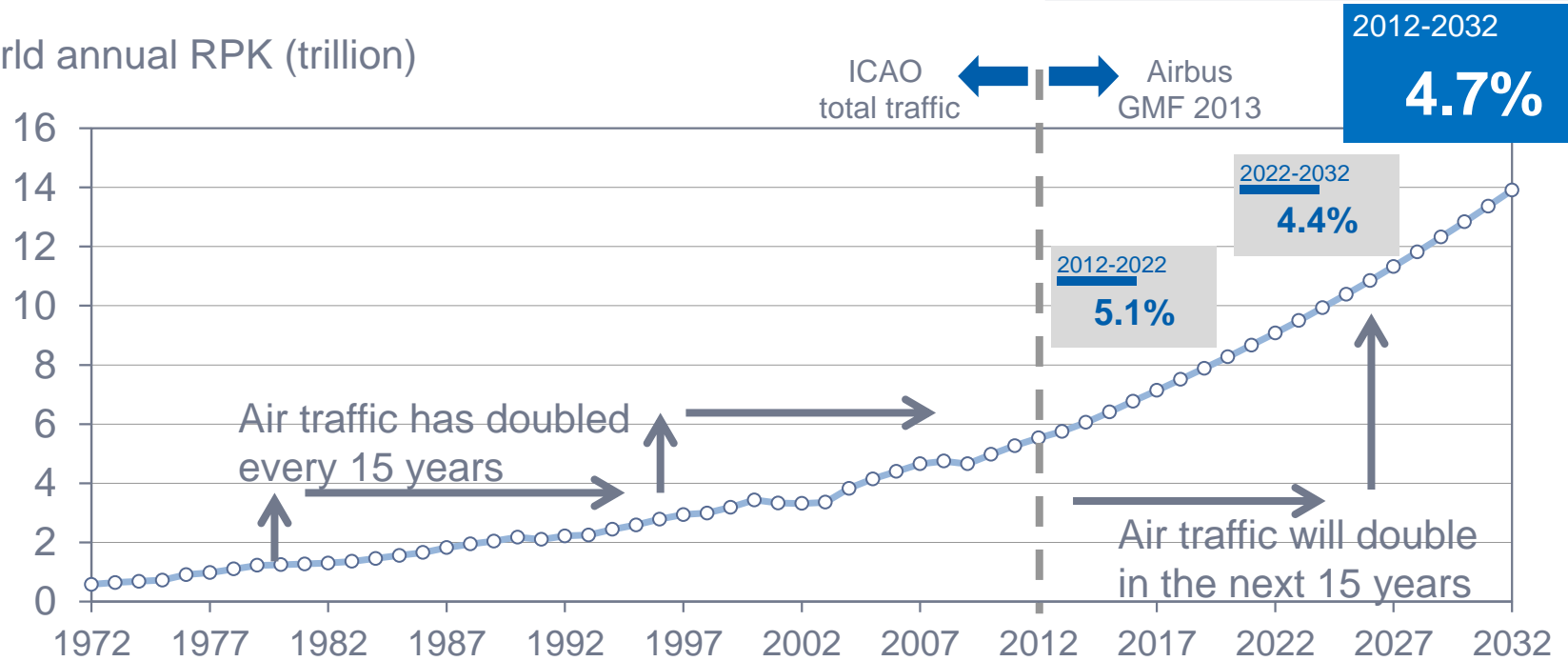
**25 deliveries  
in 2013**

**Over 1.2M flight  
hours and 50M  
passengers  
to date**



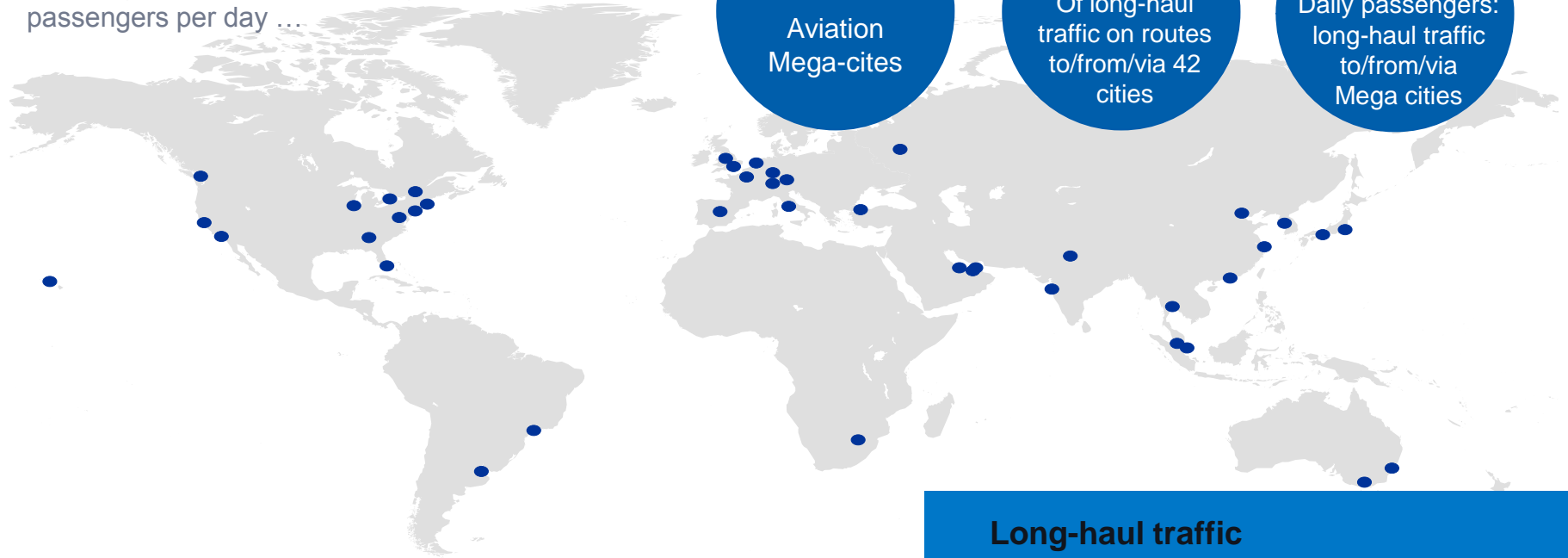
# Traffic will double in the next 15 years

World annual RPK (trillion)



# 2012: 42 mega-cities

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



**42**  
Aviation  
Mega-cities

**93%**  
Of long-haul  
traffic on routes  
to/from/via 42  
cities

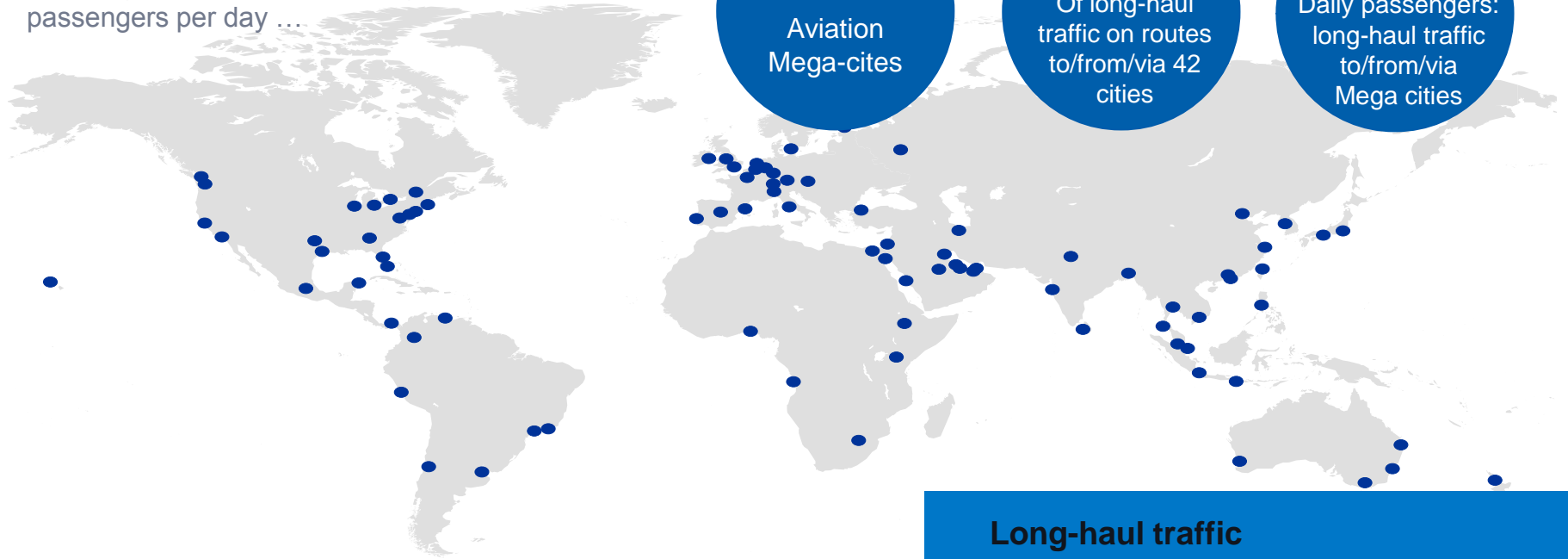
**0.8M**  
Daily passengers:  
long-haul traffic  
to/from/via  
Mega cities

**Long-haul traffic**  
**Concentrated on a few main centres**

Source: GMF 2013; Cities with more than 10,000 daily passengers, Long haul traffic: flight distance >2,000nm, excl. domestic traffic;

# 2032: 89 mega-cities

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



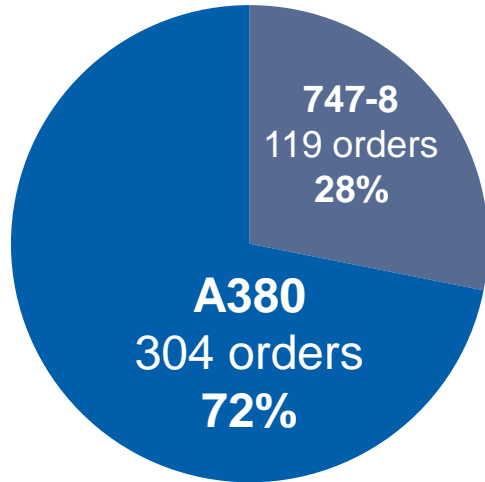
**Long-haul traffic**

**Concentrated on a few main centres**

Source: GMF 2013; Cities with more than 10,000 daily passengers, Long haul traffic: flight distance >2,000nm, excl. domestic traffic;

# A380: The large aircraft of choice

Net orders passenger and freighter  
and VIP aircraft



A380

72%  
market share

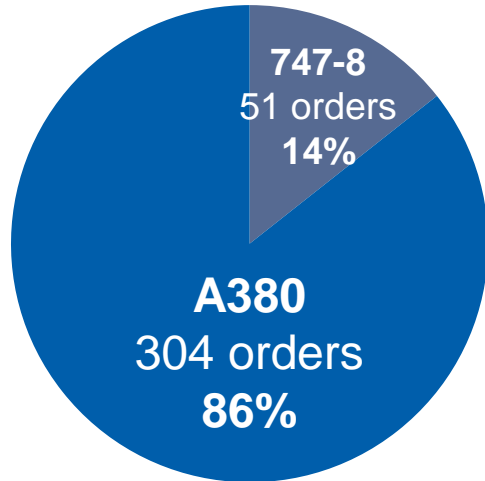


Data to end 2013, Source: Airbus Orders & Deliveries, Boeing includes 9 747 VIP and 1 A380 VIP



# A380: The large aircraft of choice

Net orders passenger  
and VIP aircraft



**A380**

**86%**

**market share**

**Takes-off or lands  
every 2 seconds**



Data to end 2013, Source: Airbus Orders & Deliveries, Boeing includes 9 747 VIP and 1 A380 VIP





RUNWAY AHEAD

30L CAT I K14

K15