

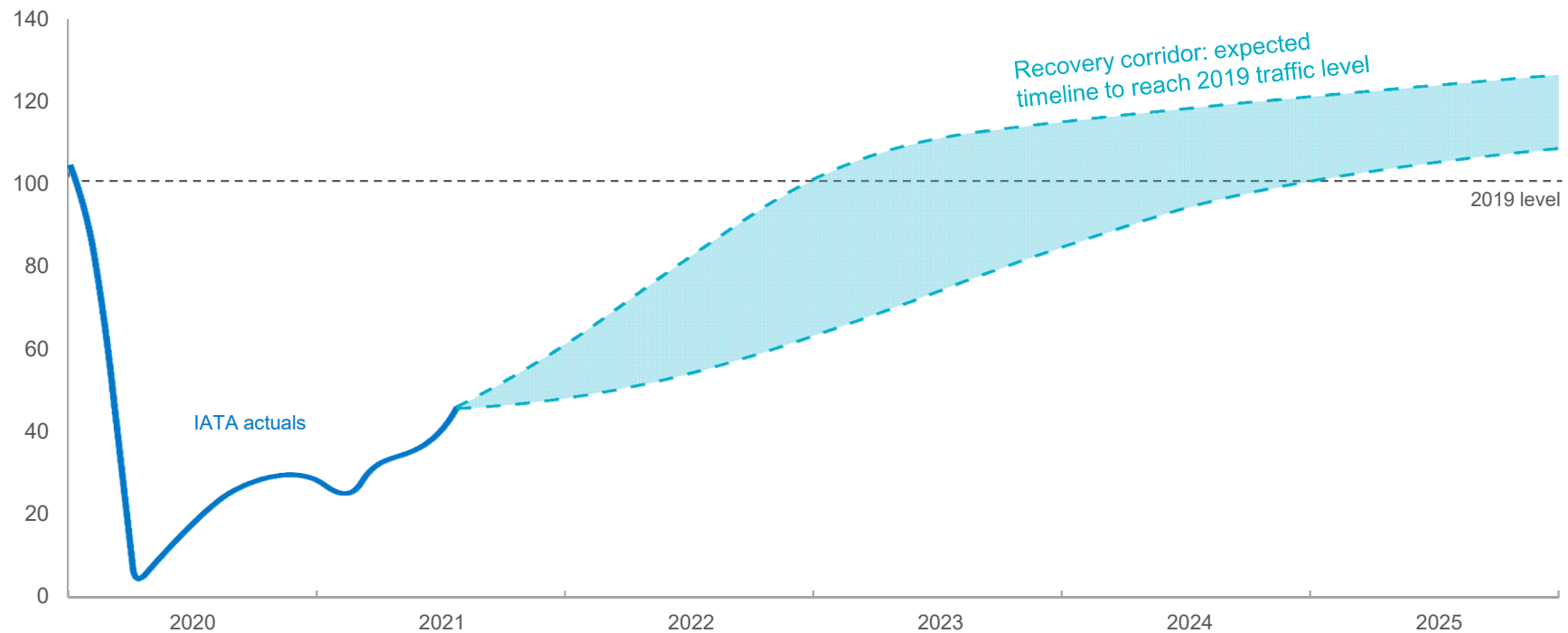
Aviation connects and unites us!
Airbus Global Market Forecast 2021

Dubai – Nov 13th

AIRBUS

Airbus expects a full recovery of air traffic between 2023 and 2025

Traffic (RPKs) base 100 compared to equivalent month in 2019



Source: OAG, FR24, SABRE, IATA, IHS Markit, OWID,
September 21 projection from Airbus GMF

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Aviation economic benefits extend beyond our industry



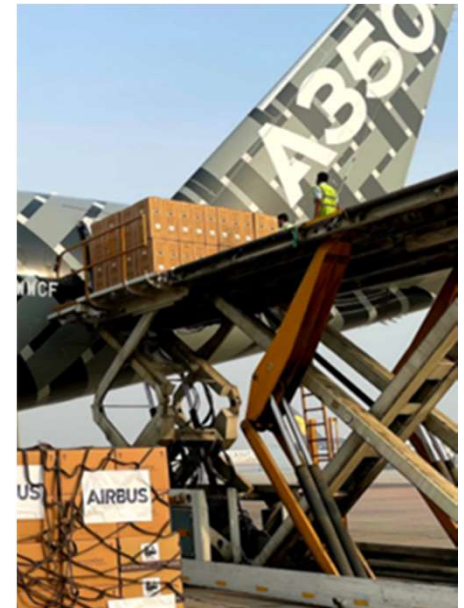
\$3.5 trillion contribution to annual global GDP (4%) and **87 million jobs**



Support tourism industry, **over 10% of world GDP**; with many small country over 25%



Connect small island to essential business, education and health services overseas



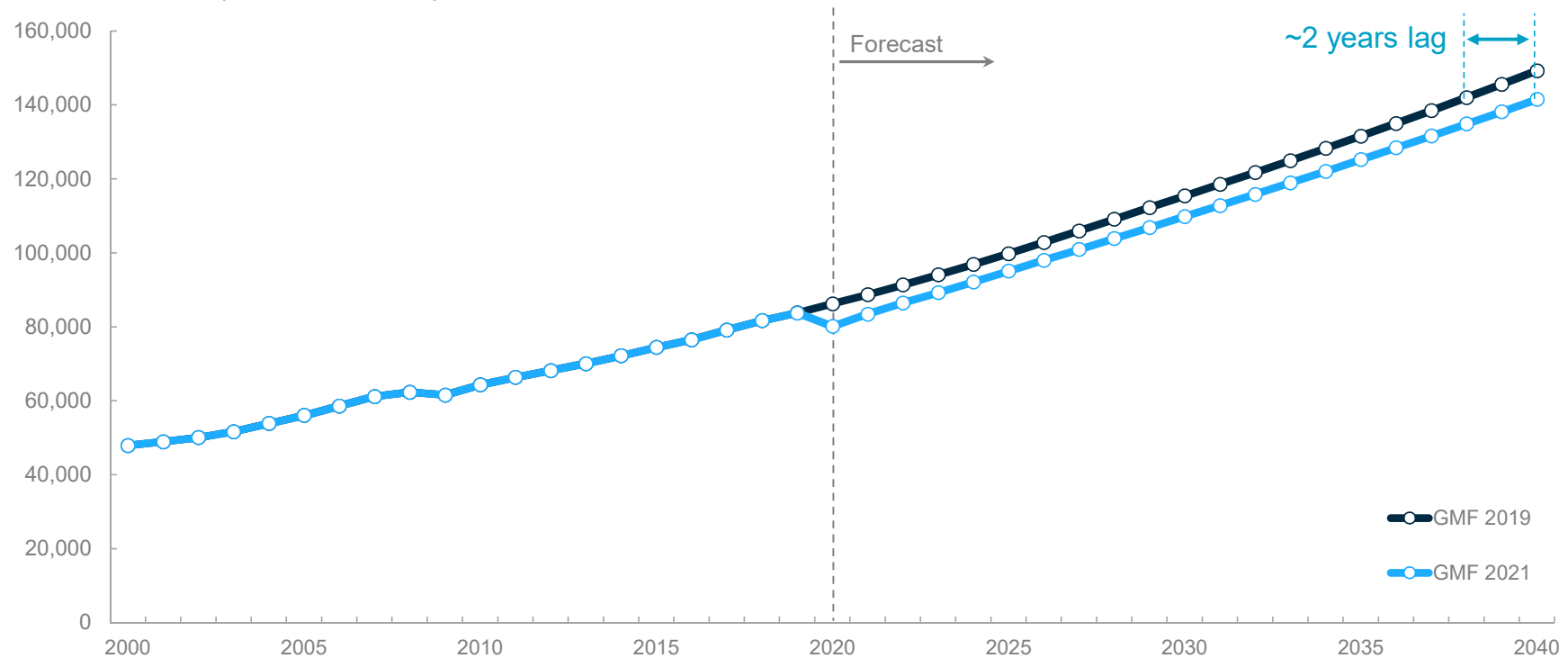
Carries **35% of World trade** in value

Source: ATAG, Airbus GMF 2021

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GDP remains the fundamental long term driver for traffic growth

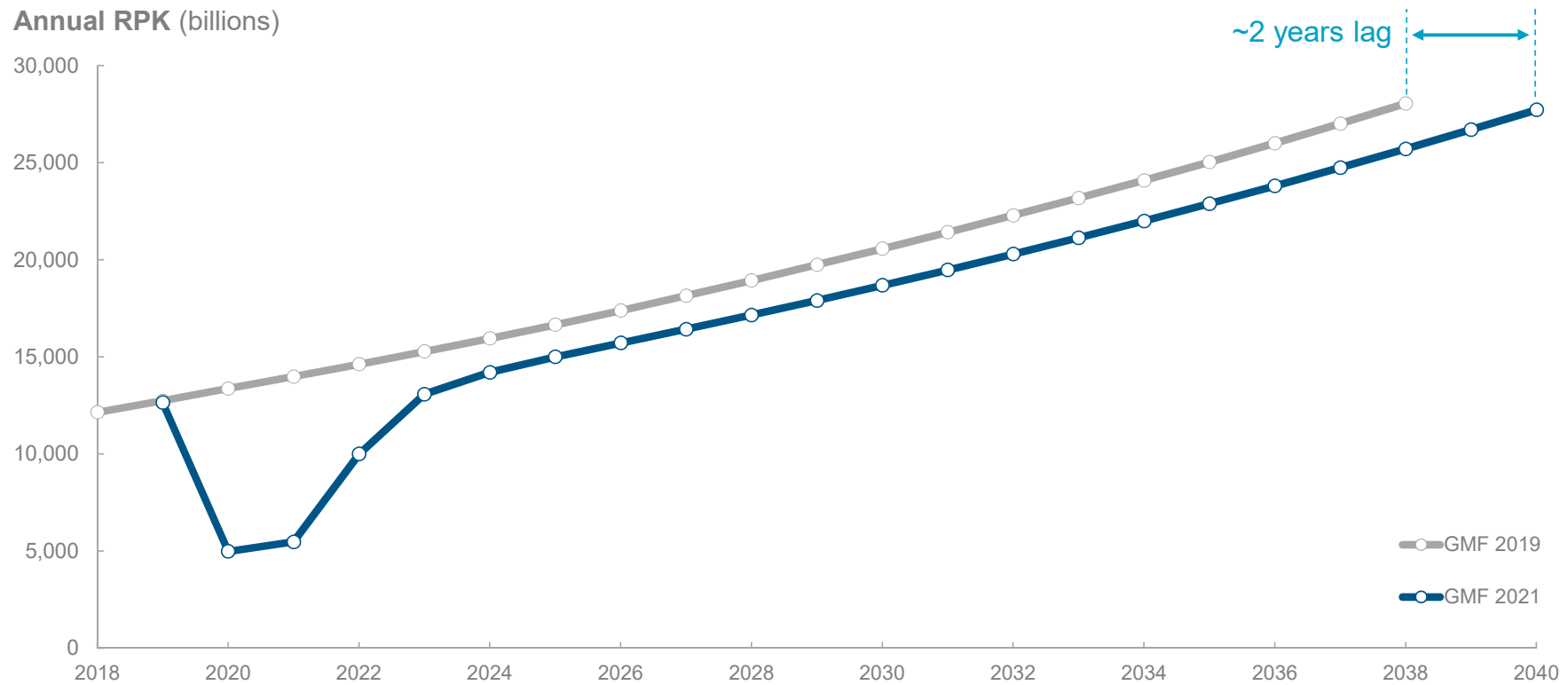
World real GDP (billion 2015 USD)



Source: IHS Markit, Airbus GMF

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Traffic to reconnect to pre-crisis trend with 2 years shift



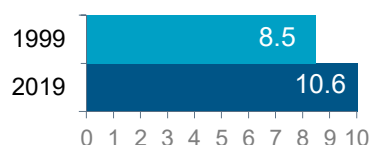
Source: IHS, Airbus GMF

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Strong industry track record on productivity improvement



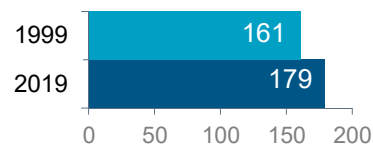
Daily
utilisation



+2
hours/day



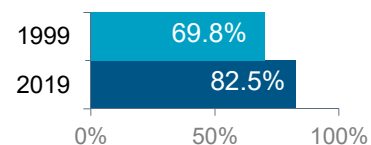
Average
seats per
flight



+18
seats/flight



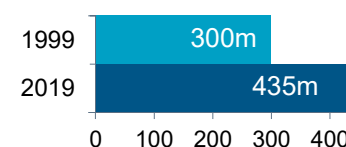
Load
factor



+13pp



RPK (m)
per a/c



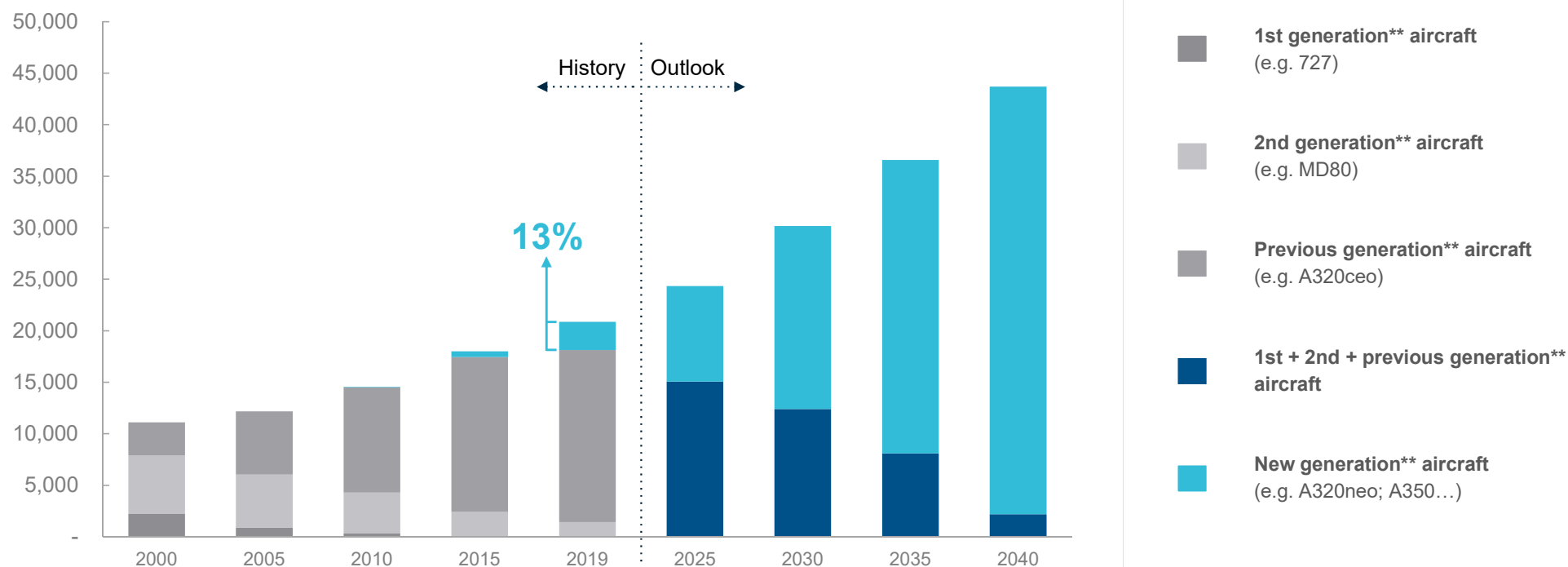
+45%

Source: IATA, ICAO, Cirium, OAG, Airbus

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Only 13% of 2019 fleet in service were new generation aircraft

Number of passenger aircraft in service*



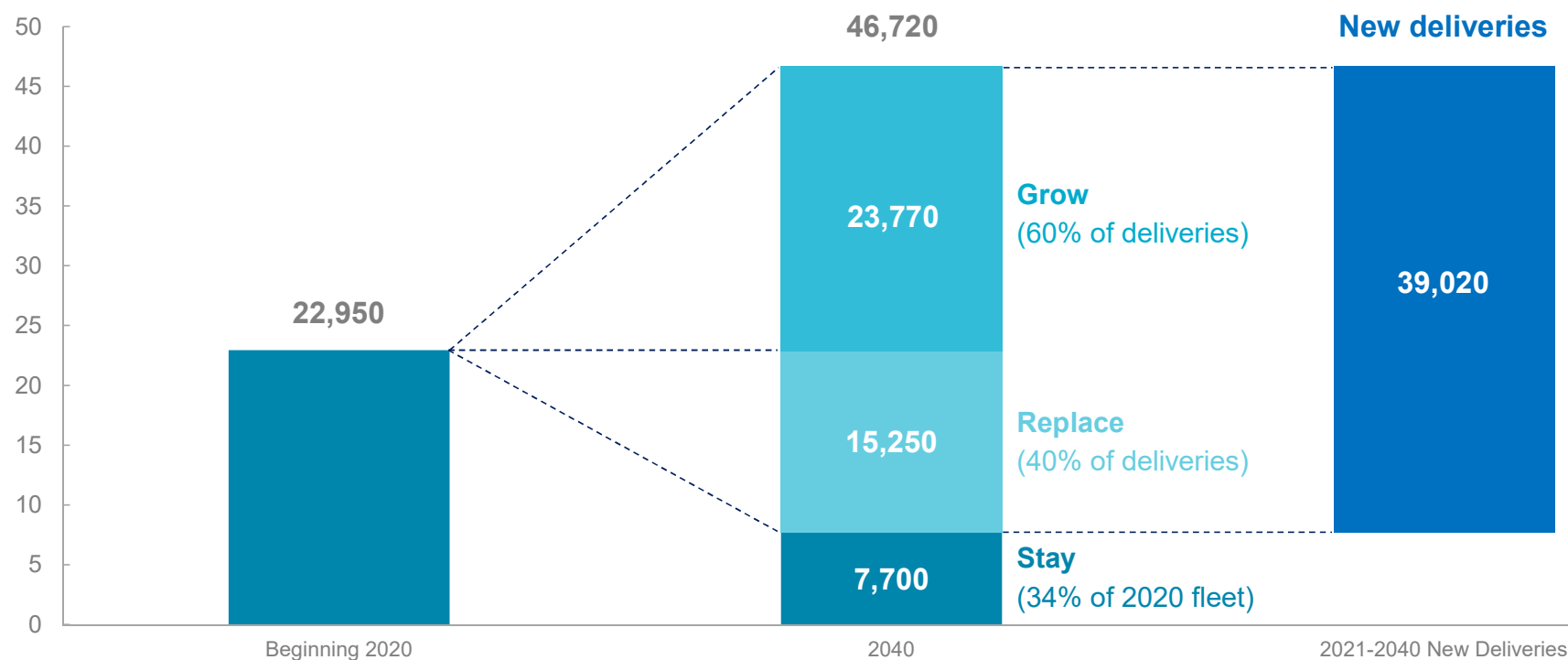
Source: Cirium, Airbus

* 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, 737, 747, 757, 767, F100
Previous generation: A320 Fam., A330, A340, 717, 737NG, 747, 777 / New generation: A220, A320neo Fam., A330neo, A350, A380, 737Max, 777X, 787 & new programs

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Demand for some 39,000 aircraft over the next 20 years

Fleet in service (thousands)



Notes: Passenger aircraft (≥100seats) & Freight (>10t) | Rounded figures to nearest 10
Source: Airbus GMF 2021

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Out of the 2021-2040 demand, 76% is for small aircraft category

SMALL

29,690 aircraft

76% share of total new del.

MEDIUM

5,340 aircraft

14% share of total new del.

LARGE

3,990 aircraft

10% share of total new del

Jet Passenger aircraft ≥ 100 seats and Freighter ≥ 10 tons

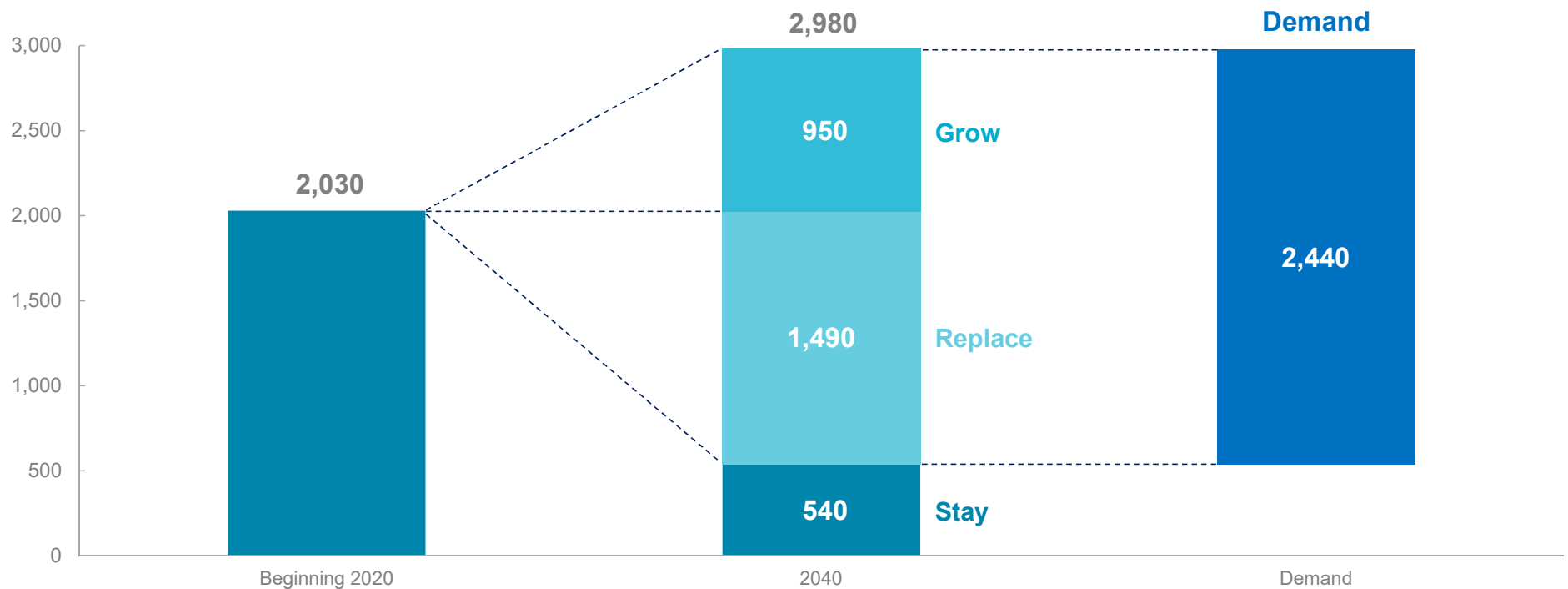
Source: Airbus Market Forecasts

Note: demand for all commercial aircraft above 100 seats & freighters above 10t

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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

Small (10t - 40t)



1,000 small
freighters

Mid-size (40t - 80t)



900 mid size
freighters

Large (> 80t)



540 large
freighters

Note: Jet freighter aircraft, payload > 10ton
Source: Airbus GMF

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39,000 deliveries

New gen aircraft with **25%** lower carbon footprint

A320 FAMILY



A220

SMALL

A330neo



A321XLR

MEDIUM

A350-1000



A350-900

LARGE

AIRBUS