

Regional Aircraft Markets

Outlook – Dynamics to 2032

PNAA 2018 – Post Event



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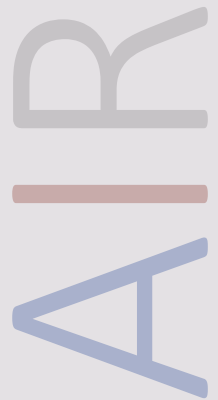
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Market in Perspective 2017-2032

USA: home to 70 percent of the world's regional jets under 100 seats

43% of all flights are regional aircraft

Two dominant airframes in the US:
CRJ and EJets

Alliances and Codeshares

\$270B Market to 2032

Scope Clauses

New Global Entrants

Aircraft sizes and capabilities moving upwards, still regionals?

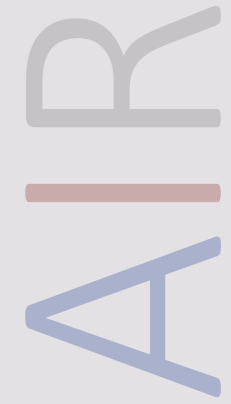
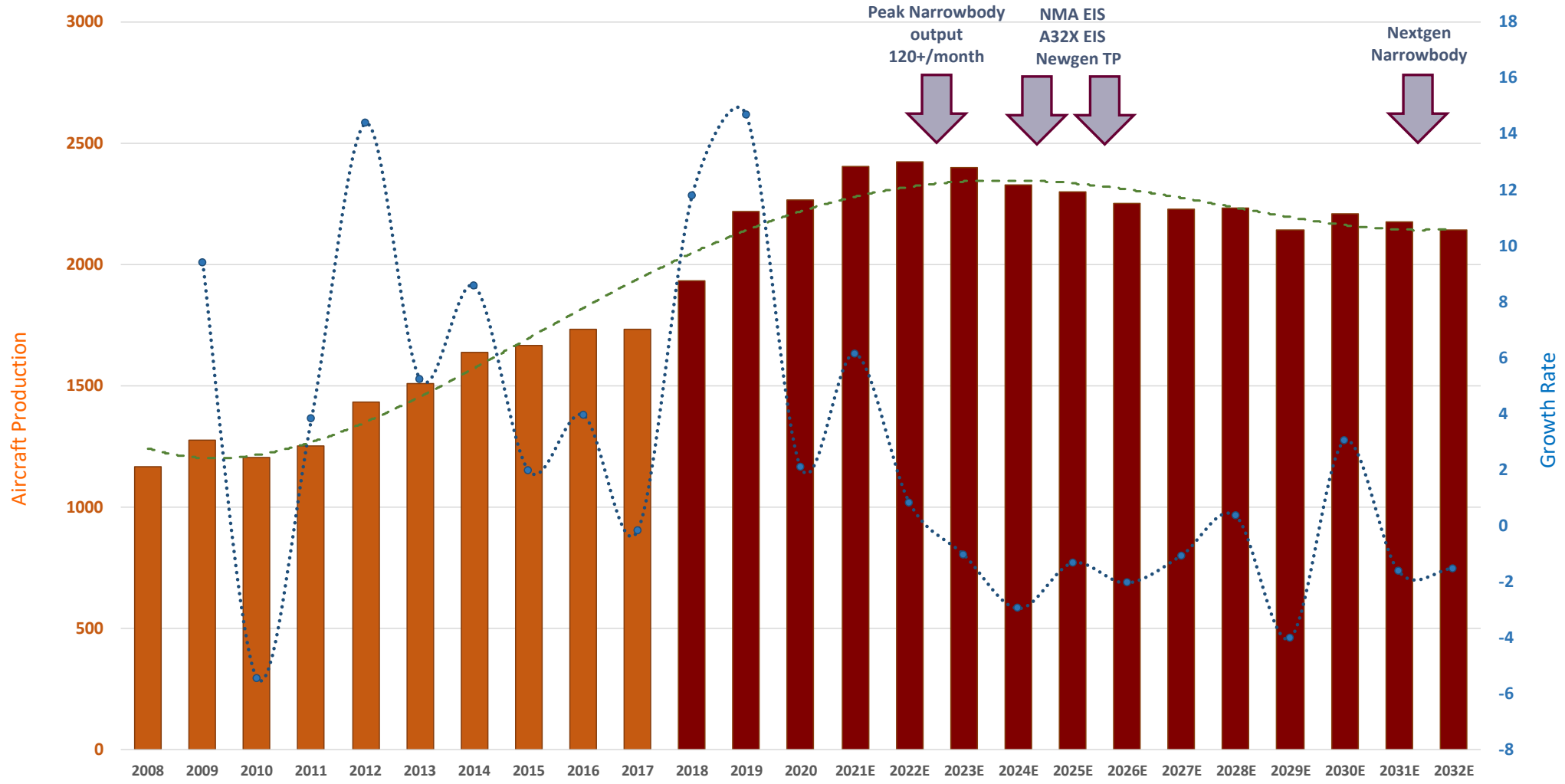
Propulsion Innovation

Cabin Interiors Transformation

FCS and Avionics

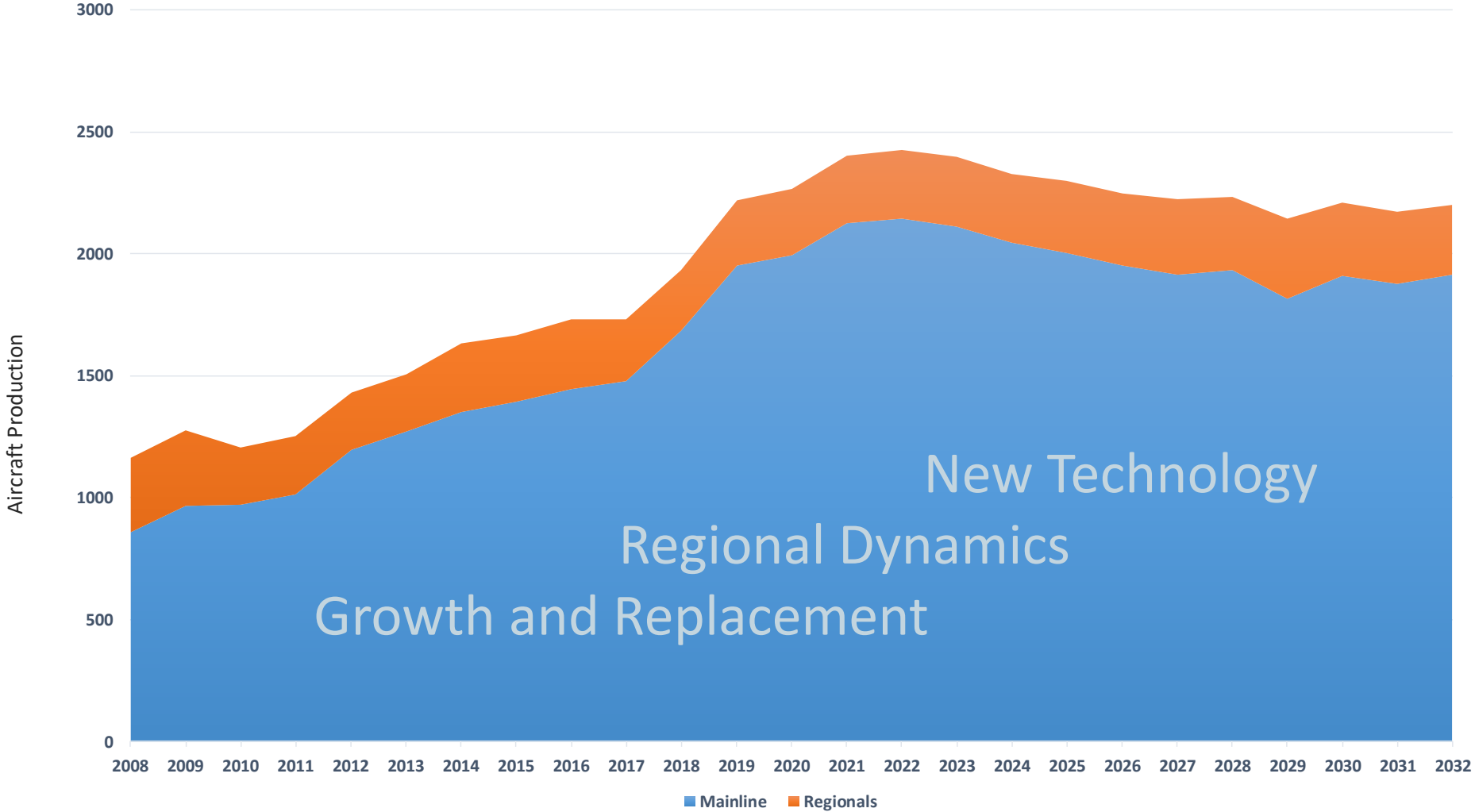
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Market in Perspective: Global Aircraft Outlook to 2032



Source: AIR Analysis – Study IF6

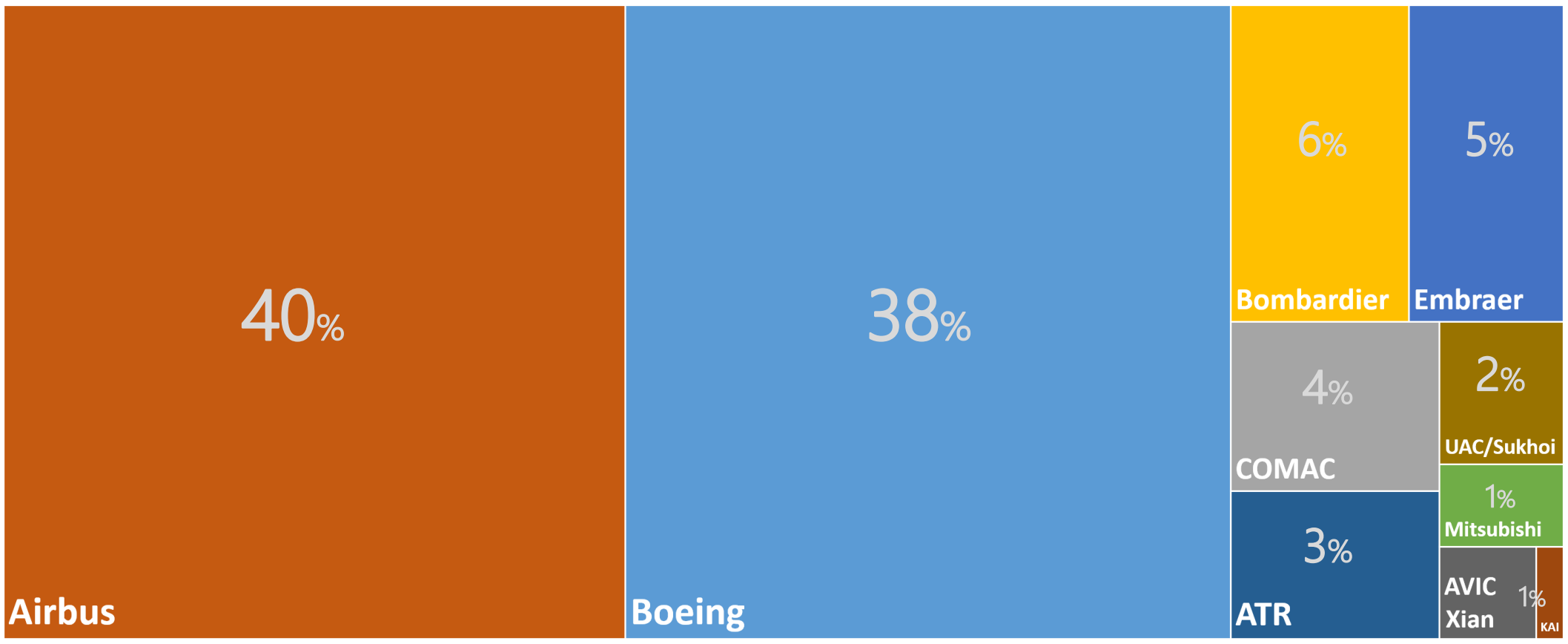
Market in Perspective: Regional Aircraft (Units 2008-2032)



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Source: AIR Analysis – Study IF6

Total OEM Production shares (2008-2032)



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Source: AIR Analysis – Study IF6

Programmes to 2032



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Source: AIR Analysis

Confidence Level

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Defense and Aerospace Strategic Advisory

Data Driven Actionable Results

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