The global recession has likely bottomed out

Source: Global Insight (August 2009), Airbus
Chinese, Japanese and US manufacturing all expanded in August

Manufacturing PMI*

* Purchasing Manager Index: composite index based on five major indicators including new orders, inventory levels, production, supplier deliveries and employment.

PMI over 50 indicates that manufacturing is expanding

Source: CLSA, Nomura, ISM, Airbus
Still a two-speed world

Source: Global Insight (August 2009), Airbus
China and India leading world economic recovery

GDP growth 2008-2013

Source: Global Insight (August 2009), Airbus

Bubble size proportional to real GDP at PPP (Purchasing Power Parity) in US$billions in 2013
Passenger traffic recovery anticipated in 2010

<table>
<thead>
<tr>
<th>Traffic growth (Passenger-Miles)</th>
<th>Traffic growth (Passenger-Miles)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>2010</td>
</tr>
<tr>
<td>North America</td>
<td>-4.4%</td>
</tr>
<tr>
<td>Europe/CIS</td>
<td>-2.1%</td>
</tr>
<tr>
<td>P.R. China*</td>
<td>+3.6%</td>
</tr>
<tr>
<td>Asia/Pacific</td>
<td>-0.6%</td>
</tr>
<tr>
<td>Latin America</td>
<td>-1.9%</td>
</tr>
<tr>
<td>Middle East</td>
<td>+0.9%</td>
</tr>
<tr>
<td>Africa</td>
<td>+0.3%</td>
</tr>
<tr>
<td>World</td>
<td>-2.0%</td>
</tr>
</tbody>
</table>

Source: Airbus GMF, Revenue Passenger Mile % change over previous year

* Includes China Mainland + Hong Kong + Macao
Fourfold increase of Chinese private consumption over next 20 years

Chinese real Consumer Spending (Private Consumption - US$ billion)

AAGR* 1988-2008 +7.7%

AAGR* 2008-2028 +7.2%

Source: Global Insight (August 2009), Airbus

* Average Annual Growth Rate
Air travel has proven resilient to past external shocks

World annual traffic (RPKs - trillions) over the years:
- Oil Crisis
- Gulf Crisis
- Asian Crisis
- 9/11
- SARS

Source: ICAO, Airbus
Air travel remains a growth market

Air traffic will double in the next 15 years

Air traffic has doubled every 15 years

Source: ICAO, Airbus
Air transport is still an emerging industry for 84% of the world population.

<table>
<thead>
<tr>
<th>Expanding Regions</th>
<th>India</th>
<th>China</th>
<th>Eastern Europe</th>
<th>Middle East</th>
<th>CIS</th>
<th>Africa</th>
<th>Asia</th>
<th>Latin America</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>5.6 billion people</td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Developed Regions</td>
<td>Australasia</td>
<td>Western Europe</td>
<td>Japan</td>
<td>North America</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td></td>
<td>1 billion people</td>
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</tr>
</tbody>
</table>
Within the next decade Asia becomes the most significant region for air transportation

By 2028, around 40% of all passenger-miles will be flown in Asia

Asia overtakes North America and Europe to become the dominant region, in terms of:
- Passenger-miles flow
- Number of new aircraft needed for growth
- Average aircraft size
Intra Asia demand is concentrated – increasing demand for larger aircraft types

46% of passengers want to travel between these 11 cities

91% want to travel to or from one of these 11 cities

Source: IATA PaxIS, Airbus – Full year 2008
USA domestic traffic still forms the world’s biggest single market

US domestic traffic forms the largest and most mature single market world-wide. It will retain its dominant position through 2028
## 20 year demand forecast for new aircraft

<table>
<thead>
<tr>
<th>Passenger and cargo aircraft (units)</th>
<th>2007</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airbus</td>
<td>24,262</td>
<td>?</td>
</tr>
<tr>
<td>Boeing</td>
<td>24,900</td>
<td>26,900</td>
</tr>
</tbody>
</table>

Airbus’ complete 2009 GMF will be published on our website (airbus.com) in just three days time (Thursday 17th September)

Forecast excludes Regional Jets (RJs)
Airbus and Boeing - over 10 years of sales parity

% share of gross unit orders:
1997 – 2008

Airbus
Boeing
Airbus A300B MSN001 flew almost 37 years ago
The Fly-by-Wire family – from 100 to over 500 seats

A380

A350 Family

A340 Family

A330 Family

A320 Family

8,500 Airbus fly-by-wire aircraft sold and 5,000 delivered
From 2005-2008, Airbus sold 4,293 aircraft

# Airbus aircraft sold (gross)

2009 orders through end August

2009 YTD
Airbus/Boeing both estimate around 480 deliveries each in 2009
Airbus and Boeing – current order backlog

7,000

(split 50/50)
Airbus has a robust, well-managed order book

Order cancellations are rare, even in 2001 and 2002

Data at end December 2008
A320 Family

- 6,418 firm orders
- 221 customers

(August 2009)
Operating to every continent since 2007

AUSTRALIAN ANTARCTIC DIVISION

Scheduled (seasonal) route: Hobart, Tasmania to Wilkins Ice Runway, Antarctica
A320 Family: the best keeps getting better

New Cabin with bigger bins, lower weight, less noise

Improved avionics & navigation systems

Longer maintenance intervals

Extended Service Goal for greater profit potential

Fuel burn improvements from drag and engine improvements

Winglet research for lower drag and fuel burn

Higher MTOW for greater Range

€100M per year investment – to enhance long-term value
In the downturn, airlines continue to use the A320

Aircraft in short or long-term storage

Older less efficient aircraft are grounded, many of which do not return to service

Source CASE (Aug 09)
A320 Family = 3,848
737 Classic + MD80/90 = 3,292
A320 Family – versatility breeds success

2011
5000\textsuperscript{th} delivery

2016 / 2017
7000\textsuperscript{th} delivery

2018 / 2020
8000\textsuperscript{th} delivery?

7,000 to 8,000 A320 Family deliveries likely.
A320 Family is just now at product mid-life.
A330/A340 Family

- 1,413 firm orders
- 102 customers

(August 2009)
A330 Family sales passed the 1,000 mark in 2008

1,029 firm A330 orders since launch
A350 XWB

493 orders
31 customers
(August 2009)
A350 XWB – the complete long-range family

Three A350 XWB family members launched and ordered
A350 XWB – Airbus® Intelligent Airframe

A350 XWB puts the right material in the right place

A350-900 XWB Material Breakdown (%)

- **Composite**: 53%
- **Titanium**: 14%
- **Al/Al-Li**: 19%
- **Steel**: 6%
- **Misc.**: 8%

Including Landing Gear

**CFRP**
- Wings
- Centre wing box and keel beam
- Tail cone (Section 19)
- Skin panels
- Frames and stringers
- Doors (Passenger & Cargo)

**Titanium**
- High load frames
- Door surroundings
- Landing gear
- Pylons
18m / 60 ft long fuselage section demonstrator
A350 development Schedule

**A350 XWB Family Targets / Milestones**

**2007**
- Design Freeze
- Programme Launch

**2008**
- Detailed Definition Freeze

**2009**
- Final assembly start

**2010**
- First flight

**2011**
- EIS -900

**2012**
- Flight Tests 15 months

**2013**
- EIS -800

**2014**
- Programme on track

**2015**
- EIS -1000

**Design**

**Development to maturity**

**Ramp-up**

Manufacturing & Assembly 3 years

Programme on track
A380 New generation New experience

- 200 firm orders
- 16 customers

(August 2009)
The A380 is the new flagship

Top 20 IATA carriers – 2008 international RPKs (million)

11 of the world’s top 20 international carriers are A380 customers
Substantial demand for very large passenger aircraft

Existing order book and open demand to 2026 for Very Large Aircraft

20-year demand for 1,280 aircraft
Today’s A380 customers will need over 600 VLAs alone

Source: Airbus GMF
The A380 network is growing
19 A380s delighting passengers around the world

Over 65,000 revenue flight hours in over 6,800 revenue flights
(as of 26th Aug.)

Additional airline announced routes for 2009/10 shown dotted

Over 2.5 million passengers have already enjoyed the A380 experience
“Singapore Airlines flew more than 1.6 million passengers on the A380 […], filling more than **80 percent of seats on average**. In contrast, the carrier packed an average 71.6 percent of total available seats in the quarter ended in June.”

Nicholas Ionides
SIA VP Public Affairs
September 8th, 2009
Airbus GMF publishes on Thursday 17 September. Visit [www.airbus.com](http://www.airbus.com) to download your copy.