MAXIMISING AVIATION'S ECONOMIC CONTRIBUTION

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Impact of technology improvements

- **Accidents**
  - Base 100 = 1969
  - Chart shows a decrease in accidents over time from 1960 to 1990.

- **Airport noise**
  - EPNdB, base: stage 3
  - Chart shows a decrease in airport noise over time from 1960 to 2000.

- **Fuel consumption**
  - Base 100 = 1959
  - Chart shows a decrease in fuel consumption over time from 1960 to 2000.

- **Yield**
  - Base 100 = 1965
  - Chart shows a decrease in yield over time from 1960 to 1990.
Air travel has grown ten-fold during the past 35 years

World annual traffic - trillion RPK


Oil Crisis

1971-1979: 11.5% p.a.

Gulf Crisis

1980-1990: 5.8% p.a.

Asian-WTC Crisis


Source: ICAO
World air travel will continue to grow strongly

Traffic - trillion RPK

Average annual RPK growth
2003-2023 = 5.3% p.a.

Source: ICAO, Global Insight
Travel growth will vary widely between different markets

Average annual RPK growth rate (% p.a.)
2003 - 2023

Top Ten markets

<table>
<thead>
<tr>
<th>Market</th>
<th>Average Growth Rate (% p.a.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>World average</td>
<td>5.3% p.a.</td>
</tr>
<tr>
<td>Domestic R.China</td>
<td>9.4%</td>
</tr>
<tr>
<td>Europe - South America</td>
<td>8.2%</td>
</tr>
<tr>
<td>Europe – Middle East</td>
<td>7.3%</td>
</tr>
<tr>
<td>Europe - USA</td>
<td>6.7%</td>
</tr>
<tr>
<td>Intra Europe</td>
<td>6.5%</td>
</tr>
<tr>
<td>Asia - USA</td>
<td>6.4%</td>
</tr>
<tr>
<td>Europe - Asia</td>
<td>5.8%</td>
</tr>
<tr>
<td>Domestic Europe</td>
<td>5.0%</td>
</tr>
<tr>
<td>Dom. USA</td>
<td>4.8%</td>
</tr>
</tbody>
</table>
Huge potential for future growth in air travel to, from & within the developing nations

1999 Real GDP per Capita (in 1997 US$)

Trips* per Capita - 1999

Sources: ICAO, Global Insight

* Passengers carried by airlines domiciled in the country
Modern aircraft are “good neighbours”

Noise footprint comparison (80 dBA)

A320

1970s 150-seat trijet

High Speed Train

Source: Lufthansa, AECMA
Mainline civil aircraft: a $1.9 trillion market

Total deliveries 2004-2023 = $1.9 trillion

Annual deliveries value* ($B)

<table>
<thead>
<tr>
<th>Category</th>
<th>2004</th>
<th>2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single-aisles &amp; small jet freighters</td>
<td>761</td>
<td></td>
</tr>
<tr>
<td>Small twin-aisles &amp; regional freighters</td>
<td>455</td>
<td></td>
</tr>
<tr>
<td>Intermediate twin-aisles &amp; long-range freighters</td>
<td>271</td>
<td></td>
</tr>
<tr>
<td>Large passenger aircraft &amp; freighters</td>
<td>416</td>
<td></td>
</tr>
</tbody>
</table>

*2004 catalogue prices