

Drivers for growth

Global Market Forecast 2011 - 2030

Presented by
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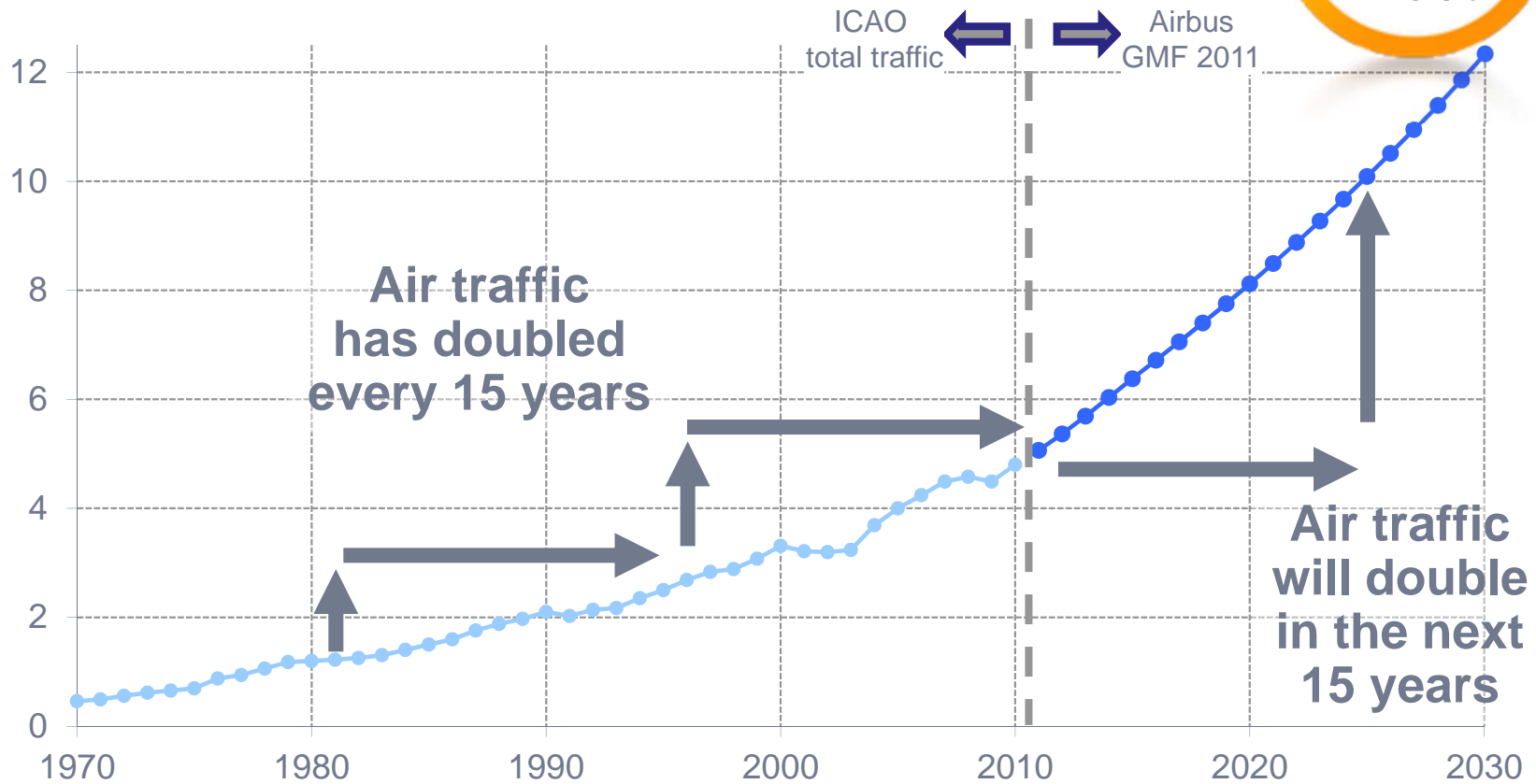
Head of Market Research and Forecasts



Air travel remains a growth market

20-year world annual traffic growth
4.8%

World annual traffic (RPKs - trillions)



Air transport has a role in most people's lives ...



*Share time
with friends
and family*



*Discover new
horizons and
cultures*



*Increase
opportunities
and business*

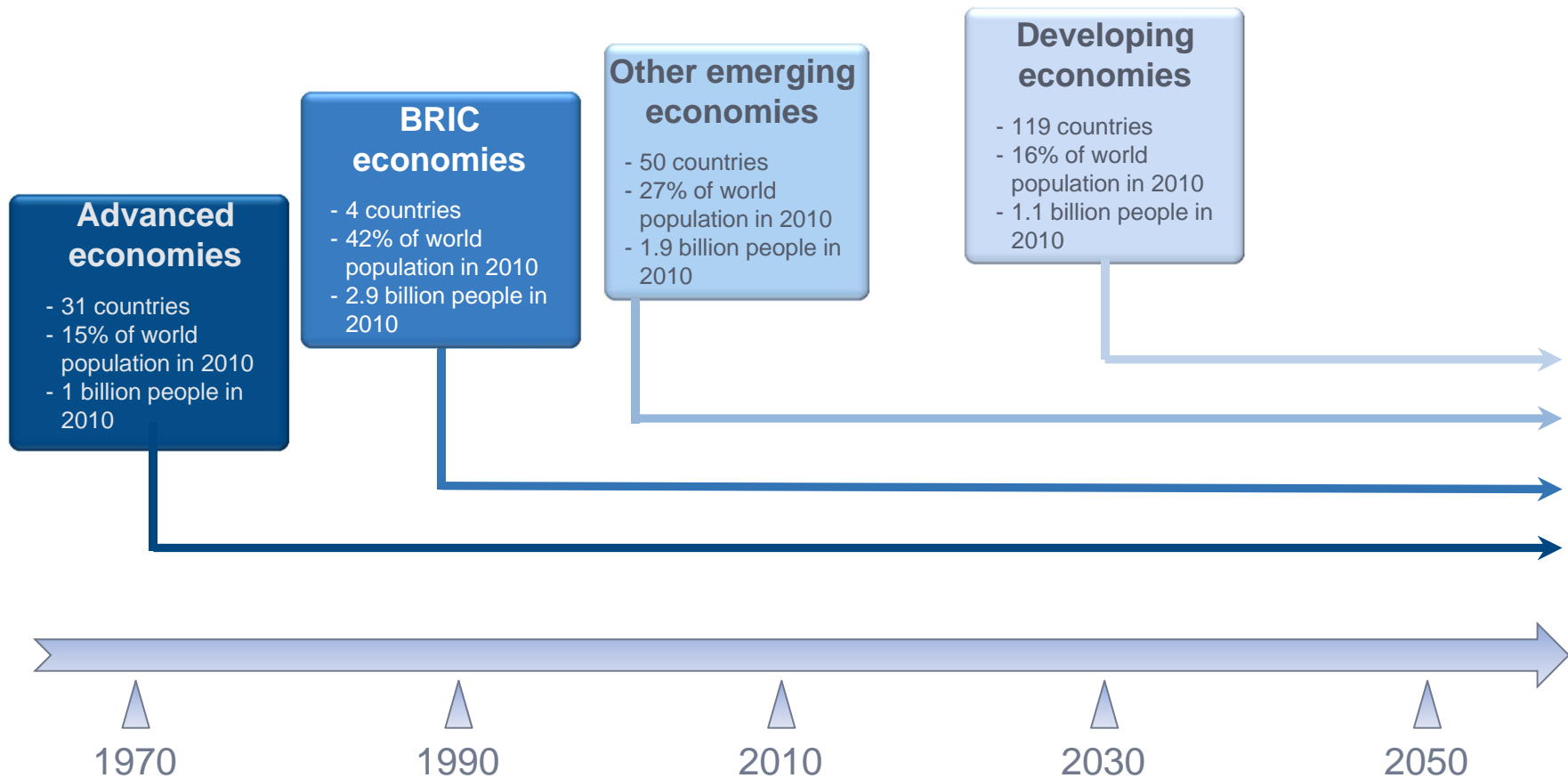


*Resolve
global issues*

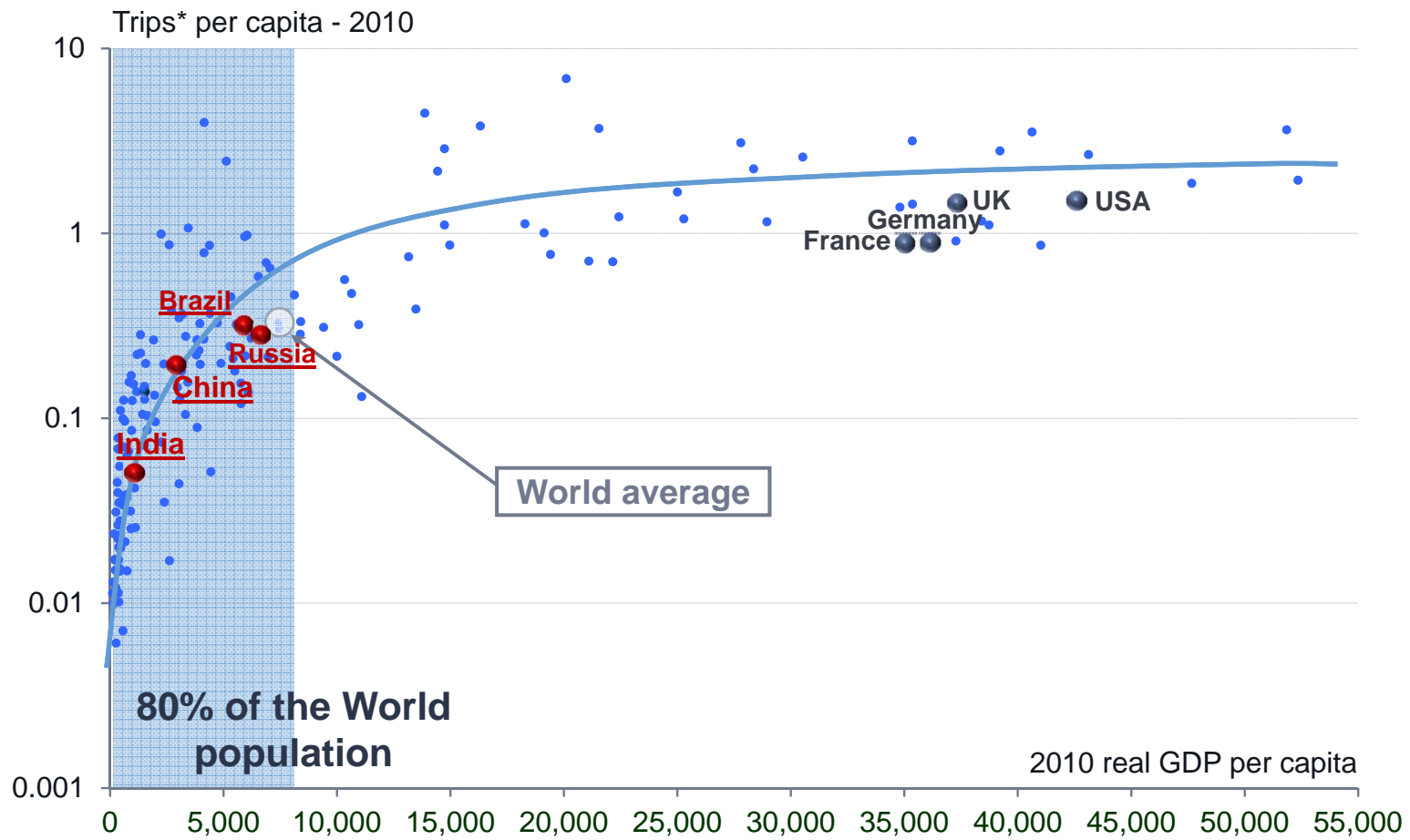
... people need to fly

The percentage of the world population that has access to air travel is continually growing

Air travel demand capture



Emerging economies drive strong travel growth

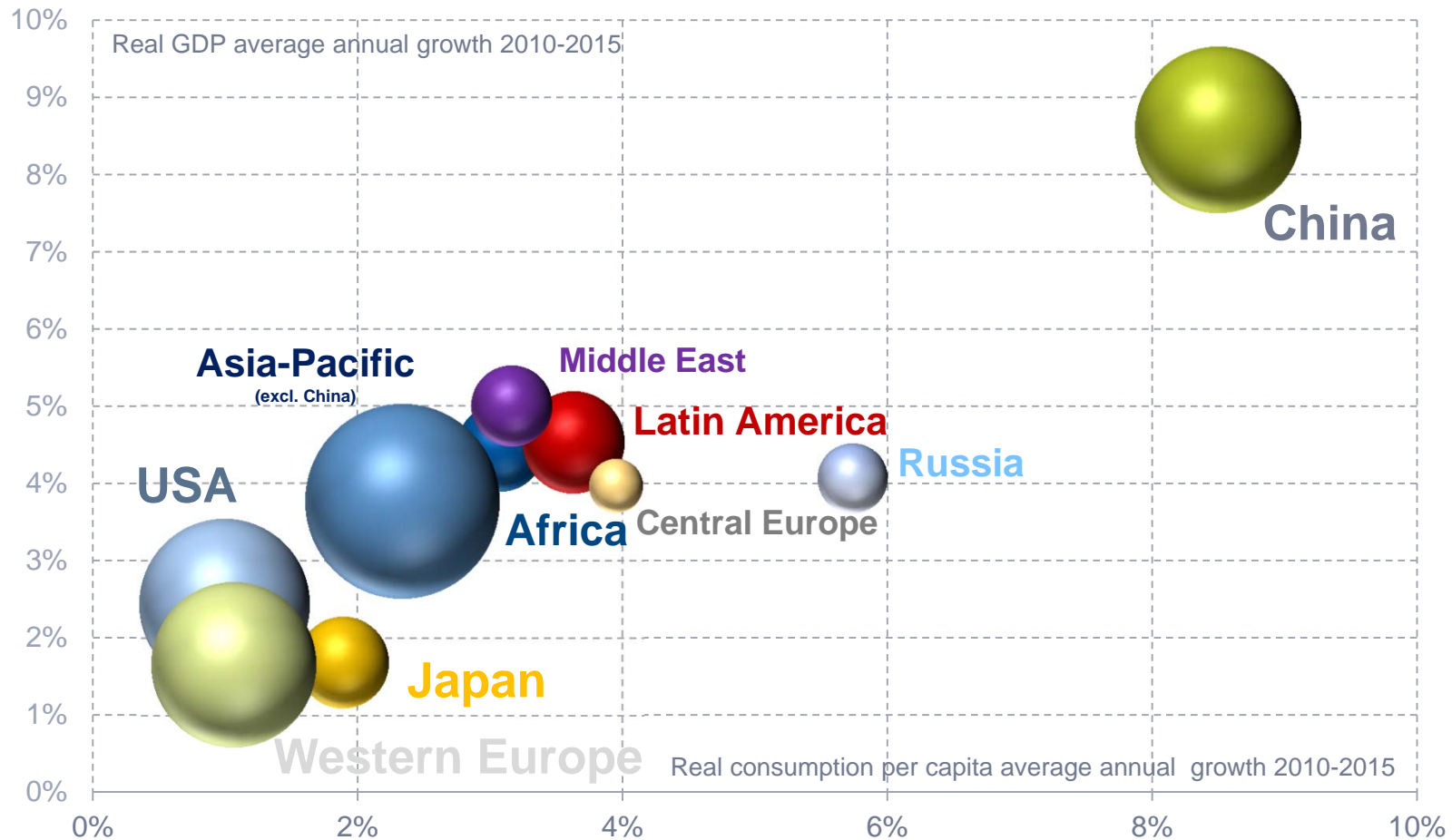


* Passengers originating from respective country

Note: GDP in US\$2005

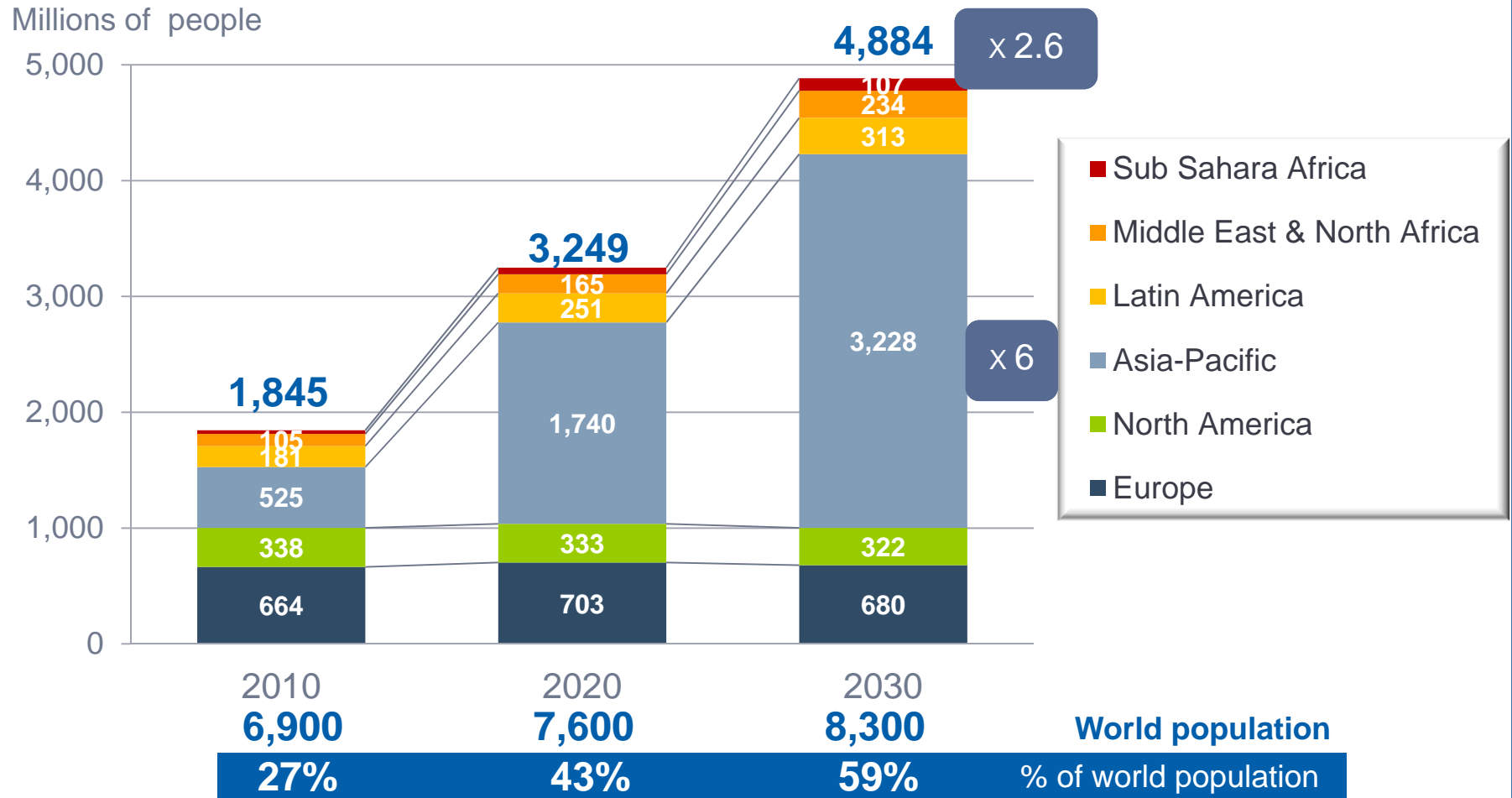
Continued slow growth in consumer spending and GDP over the next five years

Growth of real GDP at consumer spending 2010-2015 per global region



Bubble diameter proportional to *real GDP at PPP (Purchasing Power Parity)* in bn. US\$ in 2015

“Global middle class” expected to rise to 4.9 billion people by 2030

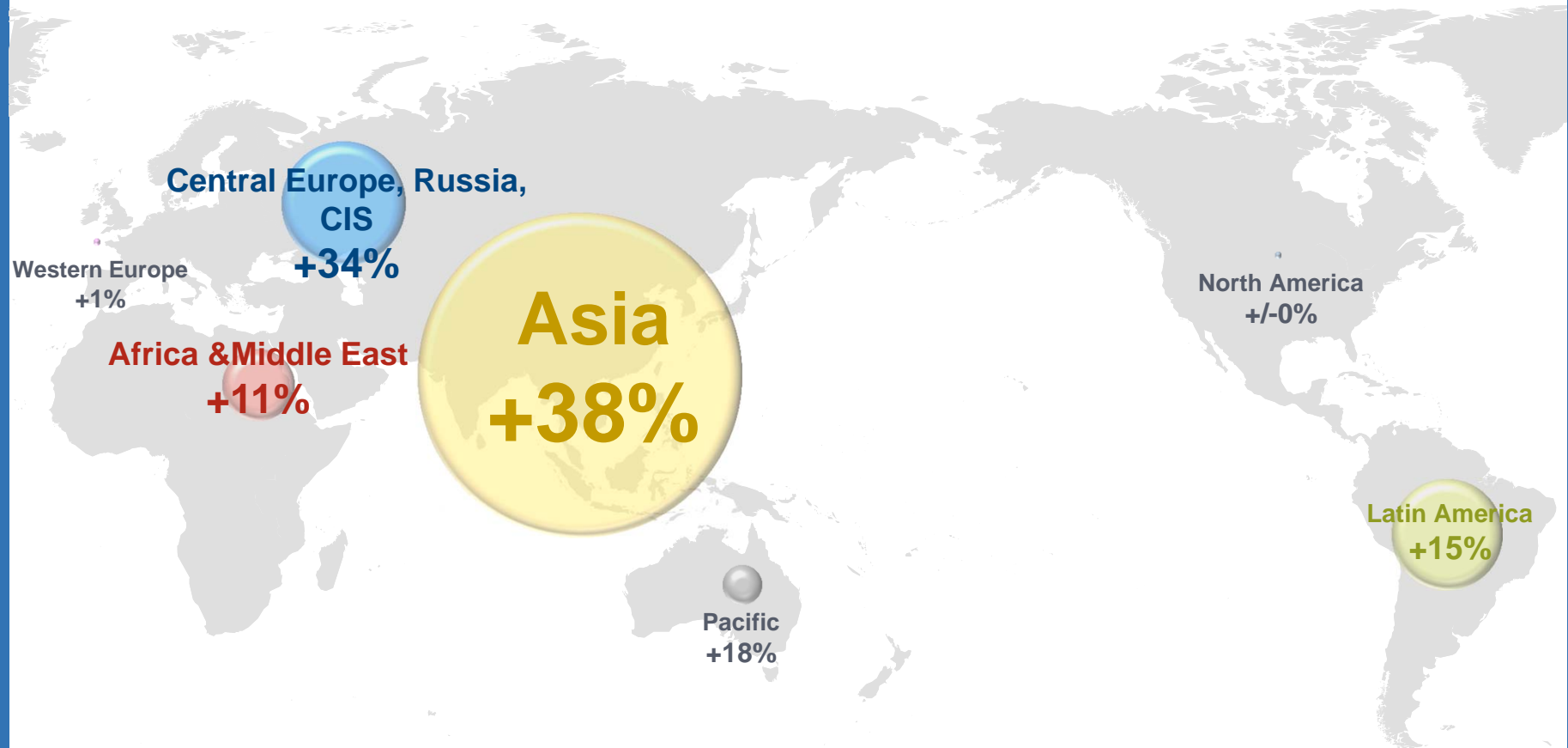


66% of the global middle class will be in Asia-Pacific in 2030

* Households with daily expenditures between \$10 and \$100 per person (at PPP)

Number of regularly served cities in emerging regions increased by 24%

Evolution of number of cities with more than 10.000 monthly departure passengers per region, 2010 vs. 2005*



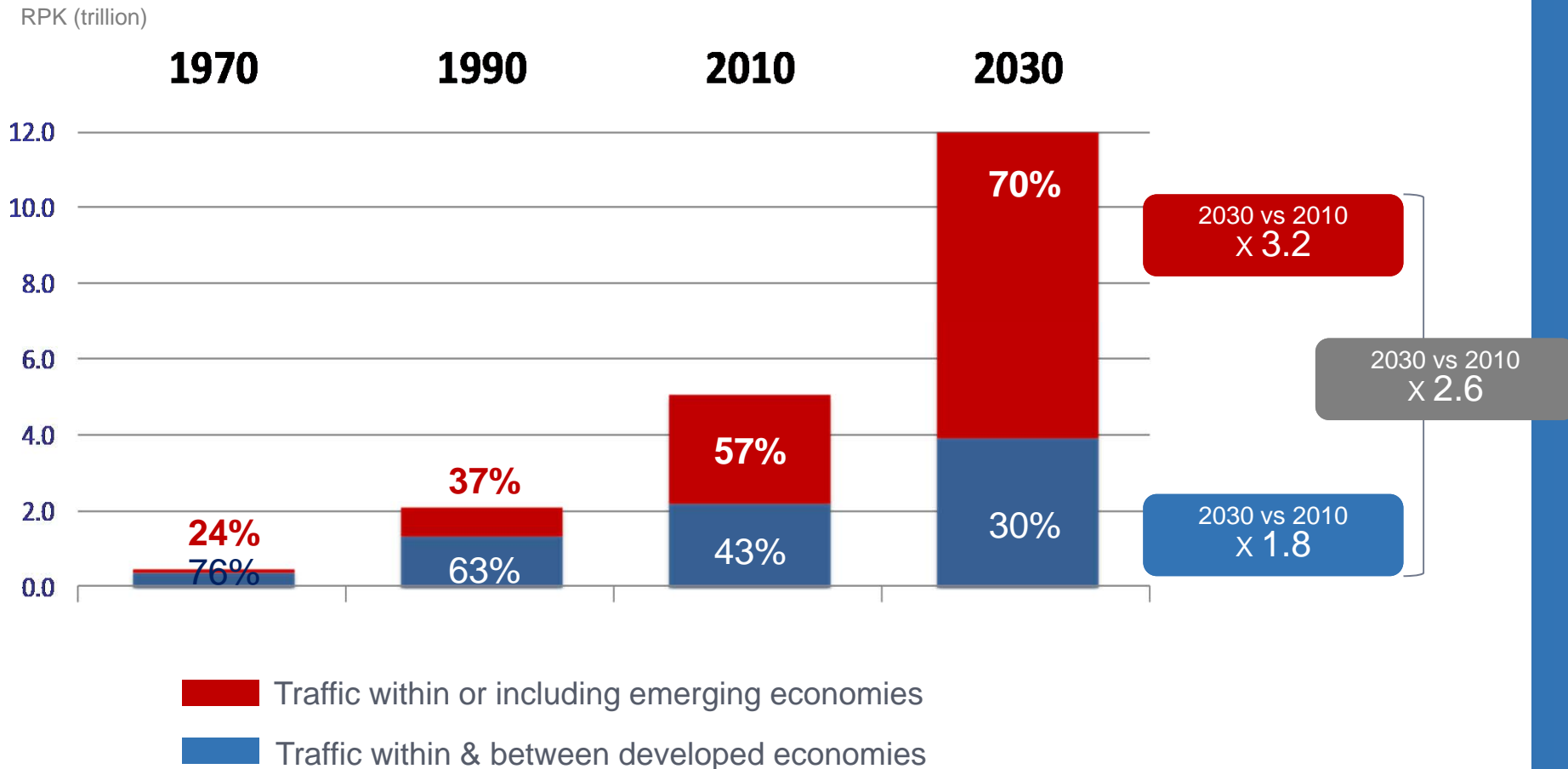
* Traffic as month of September;
Cities > 10,000 monthly departing PAX
Asia excl. Japan

Circle diameter approximately proportional
to number of additional cities
(~150 between 2005 and 2010)

**Air transport address more communities
in the World**

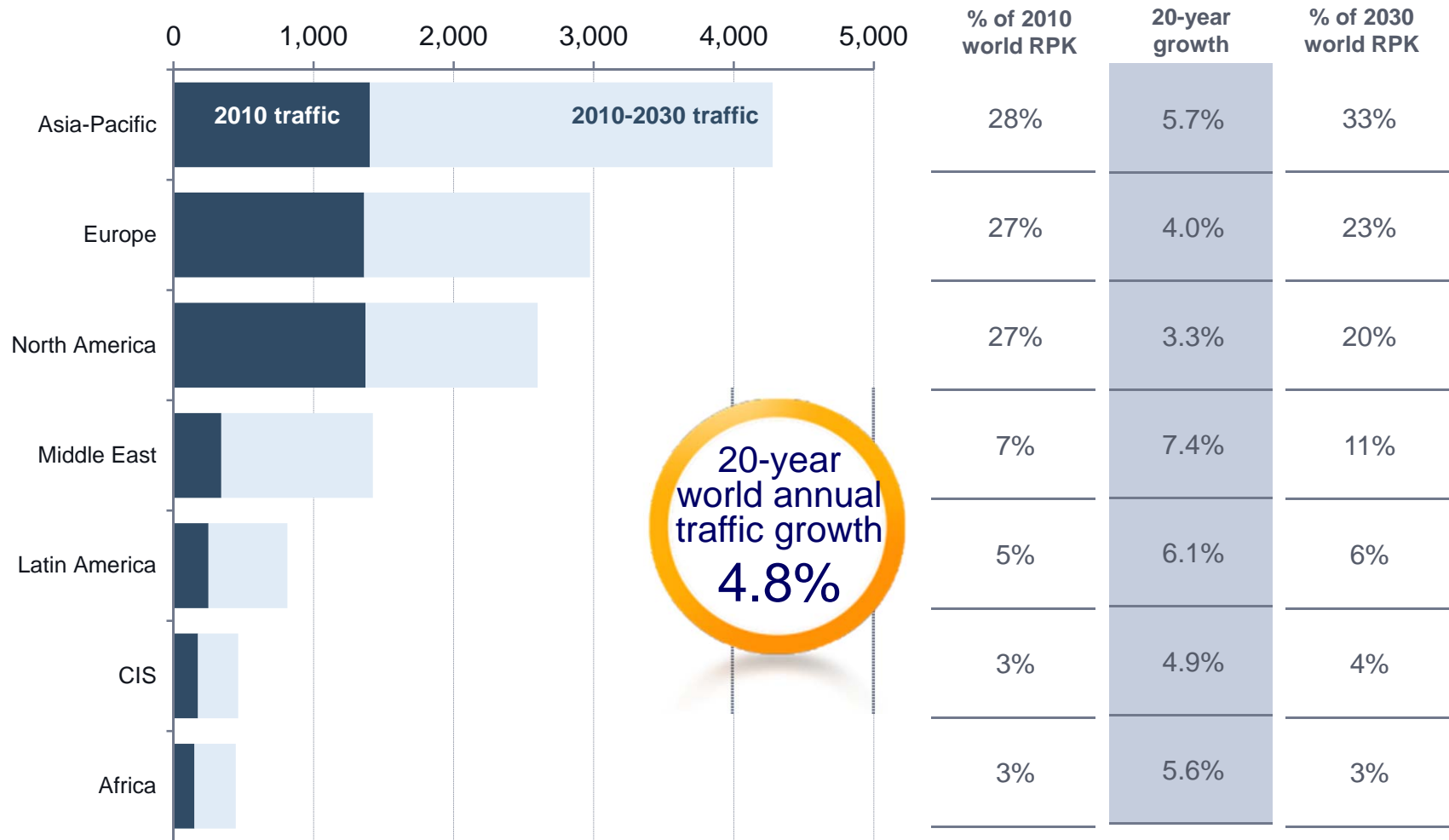
Traffic within and from/to emerging markets will more than triple in the next 20 years

Market share on total traffic, emerging vs. mature traffic flows



Asia-Pacific to lead in world traffic by 2030

World Traffic by airline domicile (RPK billions)



Continuous aircraft developments ensure lower travel costs



- A320neo : 15% fuel burn saving vs current A320



- A350-900 : 25% fuel burn saving vs current 777-200ER



- A380 : 20% fuel burn saving vs current 747-400

Main drivers for future growth

- **Dynamic growth in emerging markets – population and economics**
- **Expanding global middle class, especially in Asia**
- **Continued growth of LCCs**
- **Market liberalization – more to come**
- **Continuous aircraft developments ensure lower travel costs**