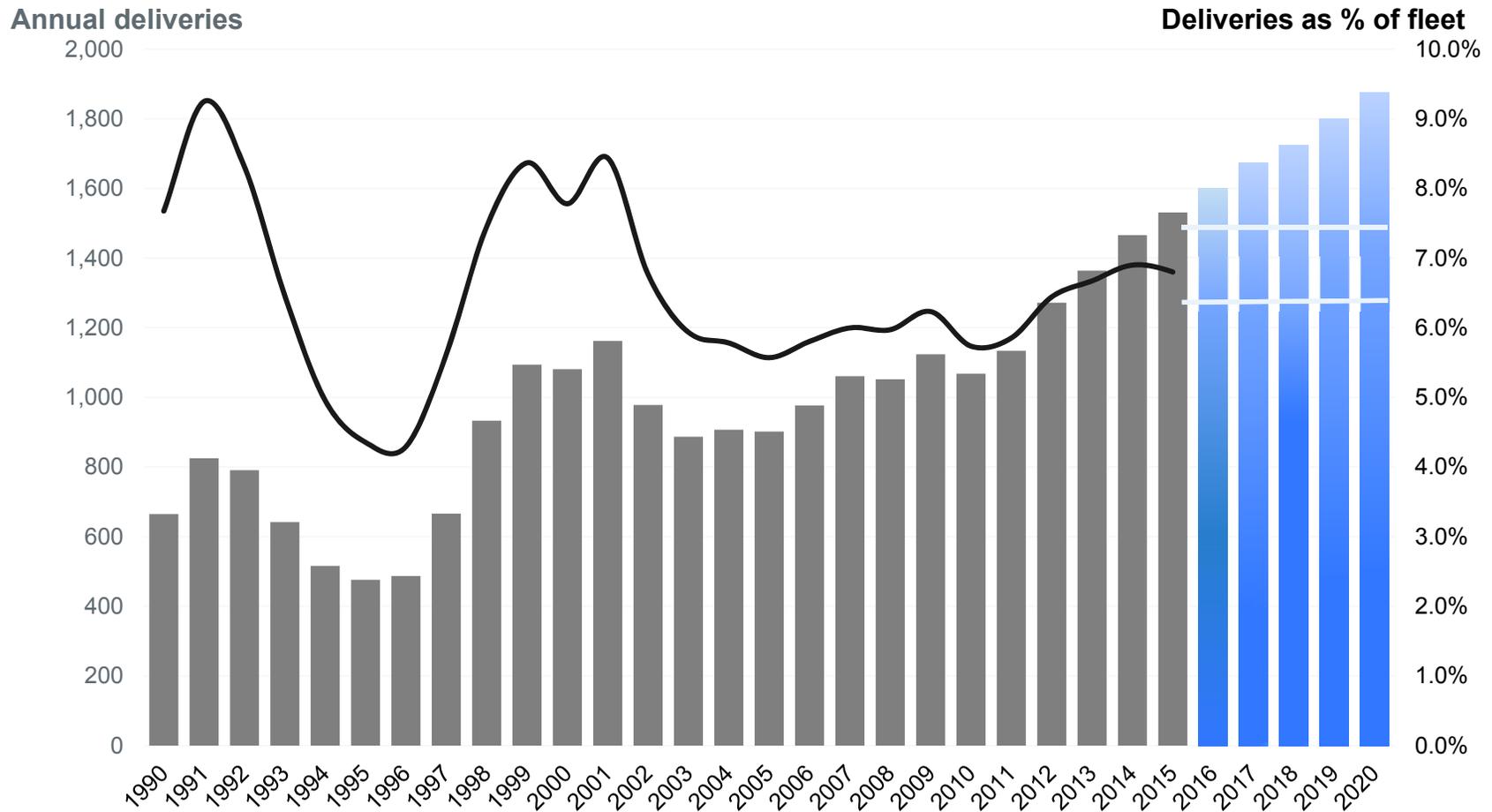




# Airplane trends

# Deliveries keeping up with replacement demand and growth

*Replacement of 2.5-3% plus Growth of 3.5-4%*



SOURCE: Ascend

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# Passenger fleet retirements rising as fleet grows

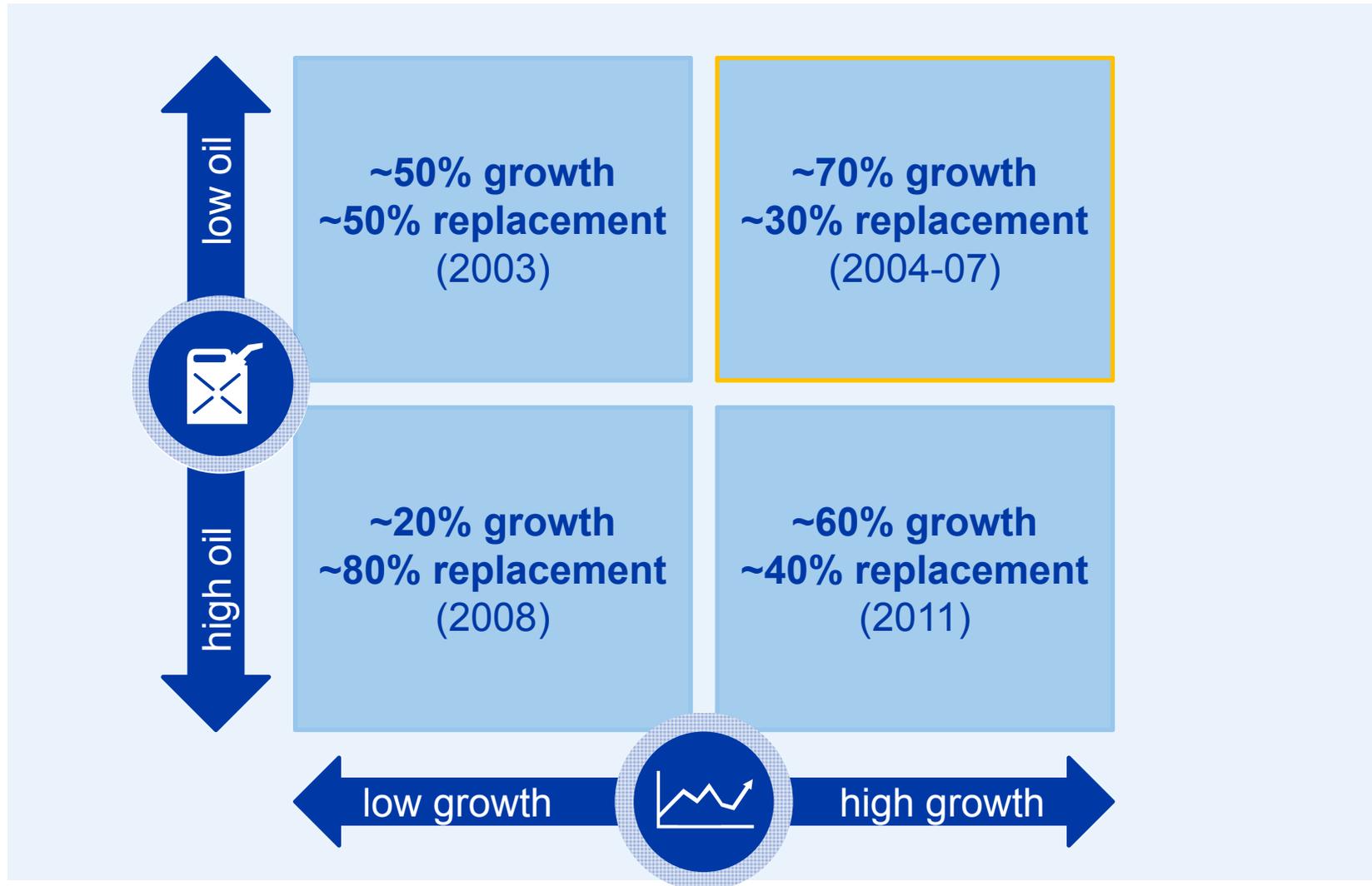
All Manufacturers

Units



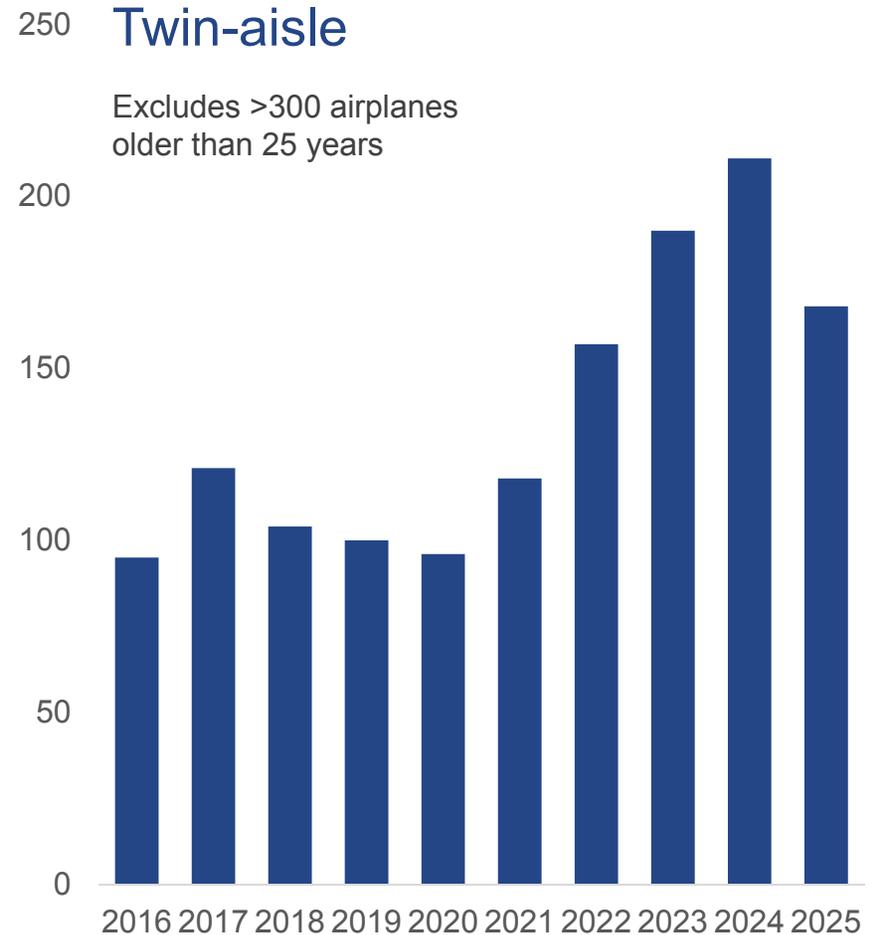
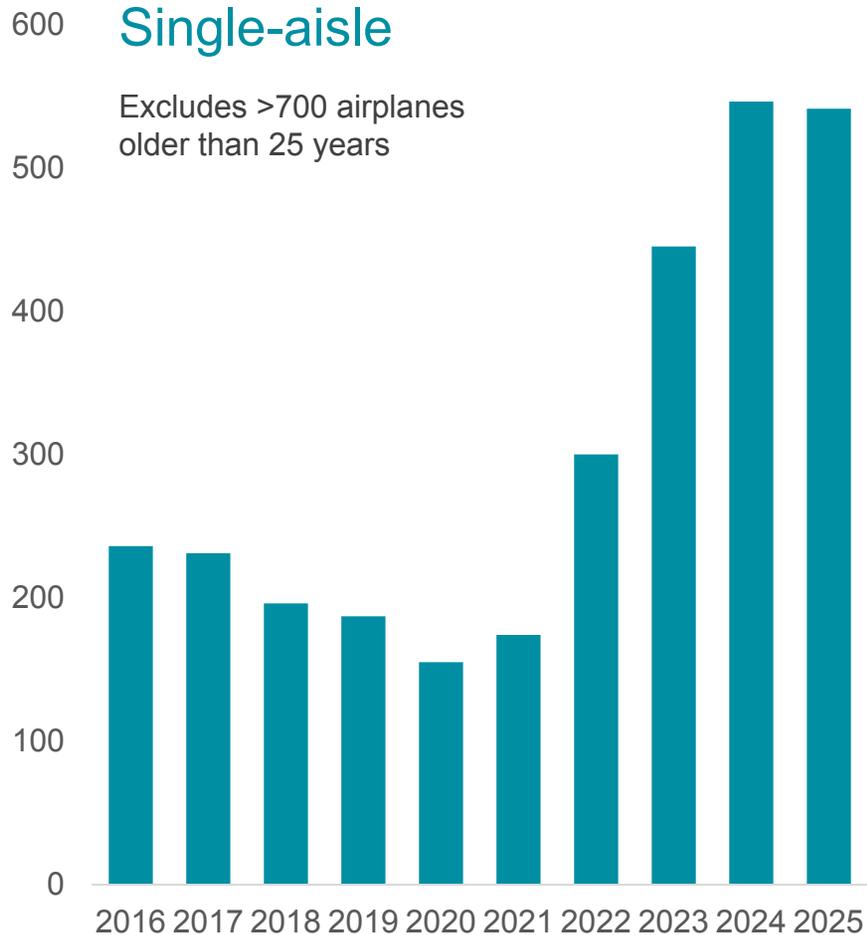
# Airlines adjust fleet to market conditions

Flexibility adds to industry stability



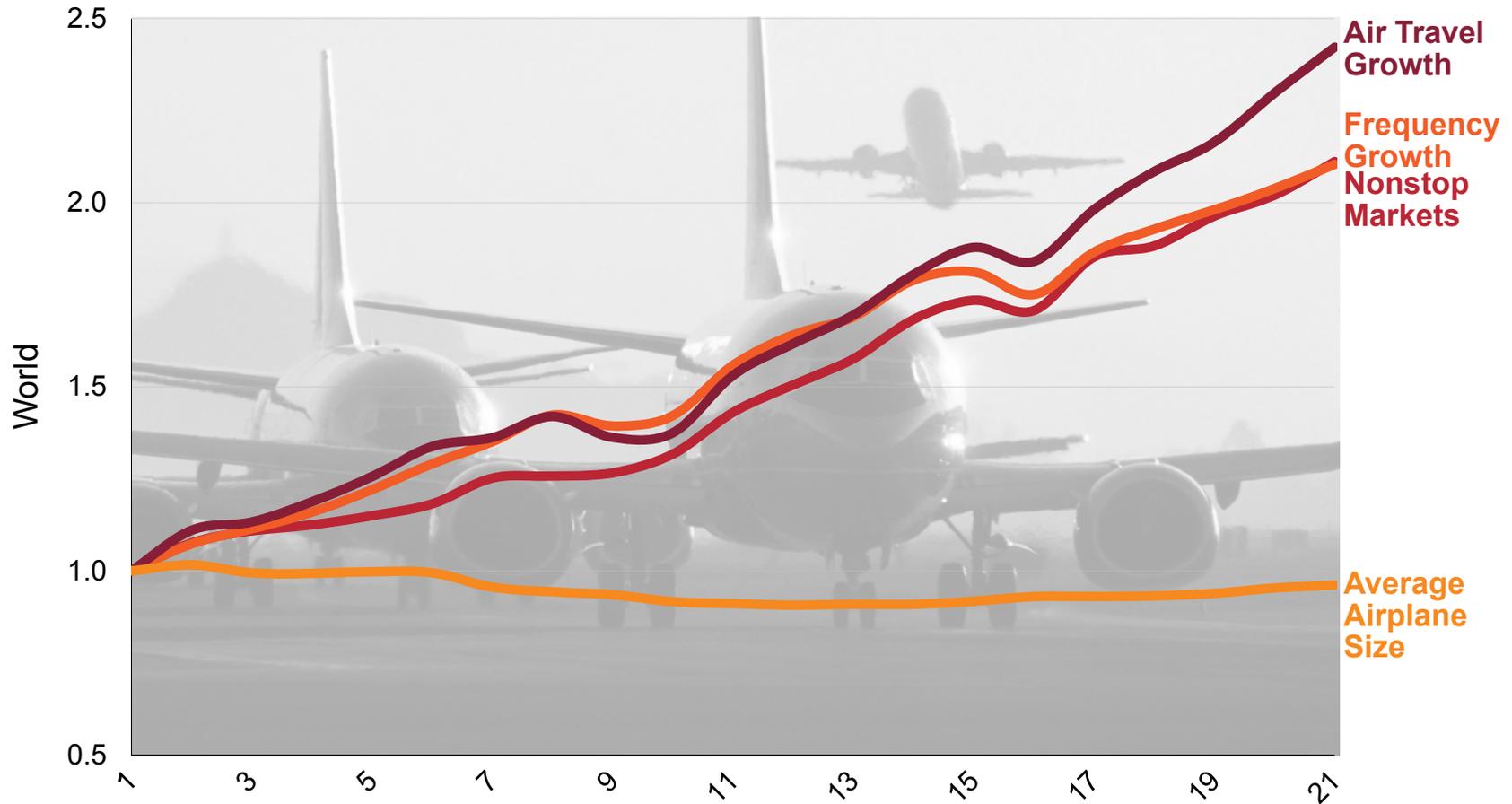
# Replacement demand increasing

Airplanes turning 25 years old



# Air travel growth has been met by increased frequencies and nonstops

Market fragmentation drives growth

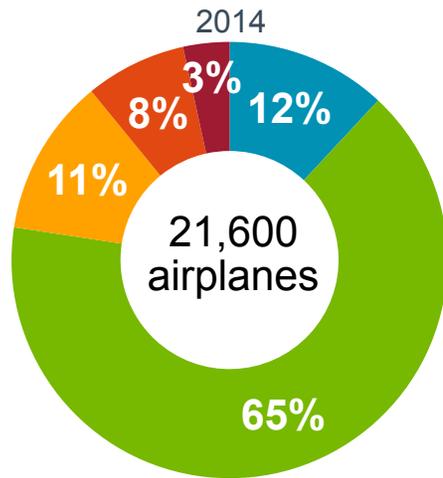


SOURCE: August OAG  
Index 1994=1.00

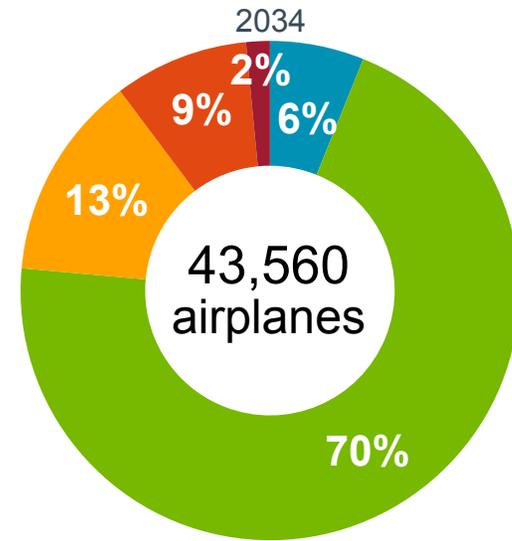
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# Fleet composition shifting



- Regional jet
- Single-aisle
- Small wide-body
- Medium wide-body
- Large wide-body



SOURCE: Ascend & Boeing CMO

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# Global fleet will double

Retirements averaging 800 units/per year

