Global purchase plans remain steady; demand for larger jets continues to build.

Regional demand

- **North America**: 59% (↓ 2%)
- **Latin America**: 17% (↓ 1%)
- **Middle East & Africa**: 18% (↓ 1%)
- **Europe**: 18% (↑ 6%)
- **Asia Pacific**: 3% (↓ 2%)

Aircraft deliveries

- 9,450 aircraft projected through 2024
- Worth $280 billion valuation
- 650-675 projected 2014 deliveries

Purchase plans by aircraft class

- **Big Cabin**: 46% (75% total valuation (Super midsized through business liner))
- **Midsize**: 28% (17% total valuation (Light-medium, medium))
- **Small Cabin**: 26% (8% total valuation)

“We will continue to expect moderate growth in 2014–2015 on the strength of new model introductions and incremental gains in economic growth, but patterns of demand are shifting in the short term.”

Brian Sill, President, Honeywell Business and General Aviation
Survey highlights

- **46%** of new purchase plans will be large cabin jets.
- **23%** of survey fleet replaced or added to new jets within the next 5 years.
- **7–8%** increase from 2013 in value of forecasted deliveries.
- **19%** of planned purchases to be completed by close of 2015, (similar proportion planning for 2014 and 2015 purchase).
- **59%** of worldwide sales originate in North America.

Regional spotlight

**Europe:**
Rebound in European purchase plans leads all regions despite softness in Russia.
- 31% of fleets planned for replacement with new jet in next 5 years.
- 19% of new purchases planned by end of 2015.

**Latin America:**
Continues near double digit fleet growth over the last 5 years.
- 47% of Latin America purchases expected before 2016.
- 49% Brazil still leads all areas in new jet purchase plans.

Industry insights

**Operator needs**
Continuing focus on large cabin jets with:
- Modern high tech avionics
- Faster cruise Mach .85
- Extended range in every class

**Operator concerns**
Lower fuel burn
Cabin Amenities
Productivity
Aircraft support, reliability, maintainability

**Fractional ownerships**
25% 25% 25% 25%
Stronger delivery performance is expected in developed economies in 2014/2015

Find out more about Honeywell Business Aviation at aerospace.honeywell.com