

100 years of flight

Annual Industry Review & 2003 Outlook



General Aviation Manufacturers Association





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The General Aviation Manufacturers Association (GAMA) represents approximately 50 of the world's leading manufacturers of fixed-wing general aviation airplanes, engines, avionics, and components. In addition to building nearly all the general aviation airplanes flying today, GAMA member companies also operate aircraft fleets, airport fixed-based operations, pilot training and maintenance technician training facilities worldwide.

- General aviation is a \$41 billion industry.
- Over 214,000 general aviation airplanes, ranging from two-seat training aircraft to intercontinental business jets, are flying in the U.S.
- In the U.S., general aviation aircraft fly over 29 million hours (nearly two times the airline flight hours), and carry 166 million passengers annually.
- Nearly 70 percent of all hours flown by general aviation aircraft are for business purposes.
- More than 5,000 communities rely exclusively on general aviation for their air transportation needs (scheduled airlines serve less than 500).
- General aviation is the primary training ground of most commercial airline pilots.

Headquartered in Washington, DC, GAMA represents the interests of its members before the United States Congress, the Department of Transportation, the Federal Aviation Administration, the National Aeronautics and Space Administration, the Transportation Security Administration, and other federal and state government agencies directly concerned with the air transportation system. It also maintains close working relationships with other associations representing various facets of the aviation community.

Through its public information and education programs, GAMA promotes better understanding of the air transportation environment and the important role general aviation plays in the national economy and in serving the transportation needs of companies and individuals worldwide.





GAMA 2003 AGENDA

Enhance GA Security

No group has a greater stake in ensuring general aviation security than the industry itself. With that in mind, GAMA will continue to build its relationship with security-related executive branch agencies, congressional committees of jurisdiction, and other aviation associations, to constantly develop and implement ideas that enhance general aviation security.

Preserve Access to Airports and Airspace

The importance of general aviation's access to airports and airspace became profoundly clear following the September 11 attacks on America. In order to make sure general aviation can continue to function as a vital link in our nation's transportation system and a dynamic engine for our economy, GAMA will work tirelessly to preserve GA access to airports and airspace.

Implement Commission Recommendations

The Final Report of the Commission on the Future of the U.S. Aerospace Industry offers a strong national aerospace vision and recommends specific steps for making that vision a reality. GAMA fully supports the work of the Commission and will actively promote its recommendations.

Accelerate Depreciation Deduction

In order to reinvigorate the U.S. economy, the President has proposed and Congress will consider significant changes to tax laws. During debate on these proposals, GAMA will advocate accelerating the depreciation of capital goods from 30 percent in the first year of ownership to 50 percent. This acceleration will stimulate airplane sales and create jobs in the aviation manufacturing sector.

Protect Aviation Funding

In 2000, the aviation community won a major legislative victory when Congress passed AIR-21, a three-year FAA reauthorization bill that substantially increased federal spending on airports, including general aviation and reliever airports. With the AIR-21 set to expire this fall, Congress will soon consider a new reauthorization bill. Keeping airport funding at levels established in AIR-21 and ensuring FAA has adequate funding for other programs will be a legislative priority for GAMA.

Expand Capacity

The FAA's Operational Evolution Plan (OEP) was created to expand the capacity of our nation's air transportation system to meet projected demand throughout the next decade. Through its Flight Operations Policy Committee, GAMA will work closely with the FAA on the refinement and implementation of the OEP, as well as the development of an air transportation plan for 2015 and beyond.

Promote Safety

Since its inception in 1970, GAMA has been a leader in improving general aviation safety. In 2003, our Safety Affairs Committee will work with the FAA and the NTSB on initiatives to thoroughly investigate accidents, identify negative trends, disseminate safety information, and develop and implement appropriate interventions.

Improve Airplane Certification Standards and Procedures

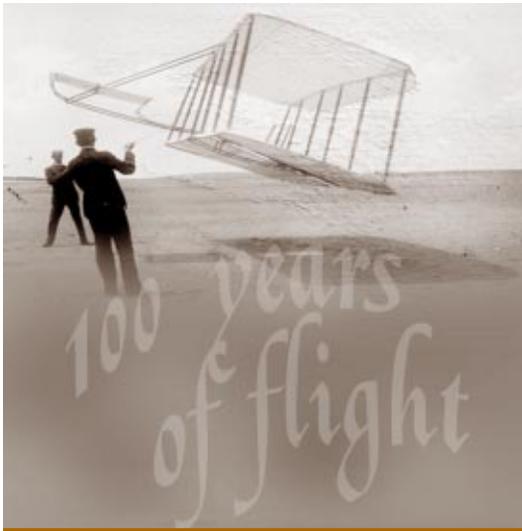
The FAA's certification standards and procedures need to be updated so that safe and innovative new technologies can be brought to the market in a timely manner. Through its Technical Policy Committee, GAMA will play a leadership role in facilitating certification improvements.

Expand International Markets

Through its International Affairs Committee, GAMA will strive to open new international markets, promote appropriate international standards and operating rules, and ensure a level international playing field for the sale of aviation products.

Facilitate Aviation Research

The federal government has historically played an important role in advanced aviation research, but that role has been declining in recent years. GAMA will work to reverse this negative trend and improve the safety and efficiency of general aviation by facilitating NASA and FAA research programs designed to bring innovative technologies to the general aviation market.



ANNUAL INDUSTRY REVIEW

EDWARD M. BOLEN
GAMA President and CEO
February 12, 2003



Welcome to the Ronald Reagan *International* Trade Center. I put particular emphasis on the word *International* because it was just last year, in this building, that GAMA announced its shipment and billing reports would become international in scope.

One year later, we are pleased to have with us tonight—not just as guests but as actual GAMA members—the leaders of those international companies who are now part of our shipment and billing reports.

I suspect that their presence here, in this the centennial year of flight, would please Orville and Wilbur Wright as it is yet further evidence of how aviation brings people and, in our case industry, closer together.

Those of you who have attended this industry press conference know that our format calls for me to share with you the key statistics from the year just ended. When I finish, our chairman, Bill Boisture, will then put these statistics in perspective and discuss some of the important challenges we will be facing in the year ahead.

Billings

For the first time in nearly a decade, total industry billings fell last year, from an all-time high of \$13.9 billion to \$11.9 billion. That is a 14.4 percent decrease.

The U.S. portion of industry billings fell from \$8.6 billion to \$7.8 billion—a 9.9 percent decrease.

Total Shipments

As you would expect from the billing numbers, shipments of general aviation airplanes fell from 2,994 in 2001 to 2,539 last year. That is a 15.2 percent decrease.

The U.S. portion of industry shipments fell from 2,634 in 2001 to 2,214 last year—a 15.9 percent drop.

Business Jet Shipments

Breaking down the shipment numbers into their component categories, we see that shipments of business jets were down 12.7 percent to 683 units last year.

Shipments of U.S.-produced jets were down 11.5 percent to 531 units.

This is the first time we have seen a drop in business jet shipments since 1996. Let me also point out that in each of the years from 1998 to 2001 the industry set a new all-time record for business jet shipments. This year's business jet shipments are still above 1999 levels.



Turboprop Shipments

Turboprops had the biggest drop of any of our airplane segments in 2002.

Turboprop shipments fell 33.5 percent to 280 units last year.

U.S.-produced turboprops dropped 38.9 percent from 306 units in 2001 to 187 units in 2002.

Piston Shipments

Total piston shipments were down for the second straight year, falling 12 percent to 1,576 units.

Shipments of U.S.-produced piston planes fell 13.4 percent to 1,496 units.

Exports

Exports of U.S.-produced airplanes were down last year.

Billings for exported airplanes dropped 16.8 percent as the number of exported airplanes fell 26.1 percent.

For U.S. manufacturers, the export market accounted for 25.4 percent of their total billings and 16.8 percent of their total shipments.

Employment

Not surprisingly, employment at GAMA member companies fell in 2002, down 12.4 percent from 2001 level.

Used Airplane Market

The used airplane market remained frustratingly large in 2002. The most concrete numbers available for used airplanes are those on the turbine market.

According to statistics provided by AMSTAT, about 17 percent of the total turbine fleet is currently on the market, well above the historical average of around 12 percent.

As one might expect in a buyer's market, the prices for used business jets are around 20 percent lower than they were in 2001.





Student Pilots

According to statistics provided by the FAA, the number of individuals holding student pilot certificates in 2002 held steady at just under 86,000. This stability comes despite a weak economy, continued layoffs at many of the commercial airlines, and security restrictions on foreign student pilots.

Clearly, Drew Steketee and his team at BE A PILOT are doing a good job stimulating interest with their promotional programs and cable TV advertising.

Flight Activity

One of the real bright spots from last year was the amount of flying by business jets in the U.S.

According to statistics supplied by the FAA, the number of IFR flights completed by business jets was approximately 13 percent higher in 2002 than it was in 2001.

Corporate Aircraft Operators

According to statistics provided by AvData Inc., the total number of corporate operators worldwide increased approximately 5 percent last year. At the end of 2002, there were approximately 13,958 corporate operators in the world utilizing a fleet of 22,576 aircraft.

In the United States alone, there were 10,191 operators utilizing a fleet of 15,569 aircraft at the end of last year.



Fractional Ownership Programs

Fractional ownership programs also appear to have grown in 2002. Again, using preliminary data provided by AvData, Inc., the number of individuals and companies in the United States that own a fractional share of an airplane increased approximately 20 percent in 2002, from 3,415 to 4,098.

The number of airplanes in fractional programs grew just over 11 percent in 2002, from 696 to 776.



GAMA member companies are reporting that approximately 15 percent of their total turbine deliveries last year went to fractional programs.

Safety

Although general aviation activity appears to have been up in 2002, general aviation accidents were down. In fact, the total number of general aviation accidents reached an historic low in 2002.

Security

Finally tonight, I'd like to talk about some of the things that have happened over the course of the last year in an area that is very important to all of us—security.

As many of you know, shortly after the September 11 attacks, GAMA, AOPA and NBAA hired a security expert to assess the vulnerability of the general aviation industry. Based on that assessment, we developed a list of 12 security recommendations that were subsequently endorsed by all of the general aviation associations and delivered to the federal government. For the past year, our industry has been working to turn these recommendations into reality.

Still, from time to time you can read in a newspaper or hear on television that “little has changed in the area of general aviation security since the September 11 attacks”.

In order to dispel this myth, I would like to share a couple of examples of how general aviation has changed since the attacks.

- Today, foreign registered general aviation aircraft must be approved by the Transportation Security Administration and submit a complete passenger manifest before they are allowed to enter the United States.
- Companies that finance the sale or purchase of a general aviation airplane must follow guidelines GAMA developed for the Treasury Department for identifying and reporting suspicious financial transactions.
- The federal government is combing the Airman and Aircraft registries for persons believed to be a security threat.
- New security procedures, including passenger screening, have been created for charter operations involving aircraft weighing over 12,500 pounds and will soon go operational.
- Pilots are now required to carry a government issued photo ID along with their pilot's license whenever they fly.
- Thanks to AOPA, Airport Watch programs have been established at general aviation airports complete with a toll-free, nationwide number for reporting suspicious behavior (1-866-GA-SECURE).
- All non-U.S. citizens seeking flight training in the United States on aircraft weighing over 12,500 pounds must undergo a Department of Justice background check.

So the next time you hear someone say “nothing has changed in the area of general aviation” I hope you will set them straight.

I will also point out that the general aviation industry intends to remain proactive in the security area.

Among the things we are still pushing for are improvements to the Airman and Aircraft registries. We would also like to find a way for general aviation to have access to the Computer Assisted Passenger Screening Systems the commercial airlines are using to identify potential security threats. And we are very interested in turning NBAA's Security Protocol—their TSAAP—into reality.

In short, we hope to be able to continually enhance general aviation security with effective, common sense security initiatives.

Conclusion

As we take a final look back at 2002, we see that our string of record-setting billings and business jet shipments has finally come to an end. In fact, shipments in all three categories of airplanes fell last year.

However, business jet flight activity was up, we set a new record for safety and a lot has been done to enhance the security of general aviation. So there are some positives we can build upon—and at GAMA we intend to do just that.





(L to R) A.L. Ueltschi, Chairman of FlightSafety International and Ed Bolen, President and CEO of GAMA, talk with Admiral James Loy, Under Secretary of Transportation for Security (TSA) at a GAMA Board meeting.



FAA Administrator Marion Blakey addresses the GAMA sponsored General Aviation Air Safety Investigators Advanced Technical Workshop.



Rockwell Collins Chairman, President and CEO Clay Jones talks with Senator Jim Inhofe (R-OK) at a GAMA reception.



GAMA President and CEO Ed Bolen and GAMA Chairman Ray Siegfried present Congressman Jim Hansen (R-UT) with a Distinguished Service Award for his support of the GA industry.



Senator John Breaux (D-LA) speaks to the GAMA Board of Directors.



(L to R) FAA Administrator Marion Blakey talks with Steve Loranger, COO of Textron, and Bill Boisture, President of Gulfstream Aerospace, at a GAMA reception.



Congressman Hal Rogers (R-KY), Chairman of the House Transportation Appropriations Subcommittee, speaks to the GAMA Board of Directors.



GAMA President and CEO Ed Bolen testifies before the House Subcommittee on Aviation.



(L to R) FAA Administrator Marion Blakey, GAMA President and CEO Ed Bolen and Under Secretary of Transportation for Security (TSA) James Loy, discuss GA issues.



Ed Bolen and other members of the Commission on the Future of the U.S. Aerospace Industry at the White House to present their final report to Vice President Dick Cheney.



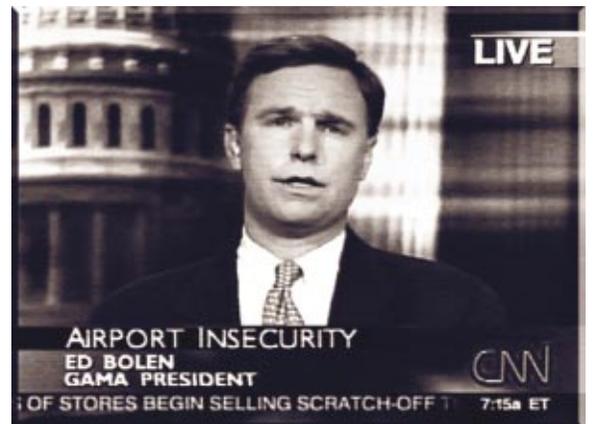
Representing aerospace stakeholders at a meeting with government officials are (L to R) John Douglass (AIA), Ed Bolen (GAMA), Carol Hallett (ATA) and John Carr (NATCA).



FAA Administrator Marion Blakey and acting NTSB Chairman Carol Carmody join Raytheon Chairman and CEO Jim Schuster on a tour of Raytheon's manufacturing facility.



Shelly Simi, Aero Club President and GAMA Vice President Communications, is joined by outgoing FAA Administrator Jane Garvey, Ambassador Ed Stimpson and incoming FAA Administrator Marion Blakey at a Washington luncheon.



GAMA President and CEO Ed Bolen discusses aviation security on CNN.

2003 MARKET OUTLOOK

W.W. BOISTURE, JR.
GAMA Chairman
February 12, 2003



I think the statistics that Ed shared with you beg a couple of fundamental questions: 1) just how serious is the current situation? and 2) what can we do about it?

How Serious?

When you are going through a tough time, it can feel pretty awful. But it often helps to put things in perspective.

This is not the biggest one year change our industry has ever experienced—it's not even close. In fact, if we were ranking the biggest one year change in billings and shipments, this year would not even be in the top five. So, we've been through a lot worse.

And keep in mind that our 2002 billings are higher than our 1999 billings which, at that time, were a new all-time record for us. Our industry today is three times the size it was just six years ago. So we are still flying at a pretty high altitude.

Finally, we are not some start-up industry trying to find its niche or some old-line industry struggling to remain relevant in today's society. General aviation is a \$41 billion industry that, by any objective measure, is an integral part of our nation's transportation system and economy. We sit at the heart of the capital equipment purchase statistics and we are fundamental to the way many companies do business today. In fact, the business model for many companies would not work but for the speed, flexibility and other benefits our products offer.

What Can Be Done?

Having said all that, we can't ignore the fact that this market is not where we want it to be. So what can we do to improve it?

The biggest single driver of new airplane sales is the economy. Nothing else comes anywhere close. And, this is a tough economy. This may not be the deepest trough in modern times but it is certainly one of the longest. Unfortunately, there is not a whole lot a single industry can do about the economy.

However, there are some very real steps general aviation manufacturers are taking to navigate through the current rough patch, stimulate some sales and position ourselves for future growth.

Navigating the Rough Patch

First, we are cutting our costs.

Almost all of GAMA's airframers have been forced to lay off workers since the economy softened. We don't like it. It's not fun. But there really isn't any choice in the matter.

Second, we are supporting our customers.

If you look at the service programs OEMs have established over the past few years you'll see that, as an industry, we have implemented training programs and utilized the internet to take product support to a whole new level.

Third, we are working to preserve the utility of our products.

Companies and individuals buy general aviation airplanes to safely, securely, quickly and flexibly get where they want to go. If they can't get into the airspace necessary to fly direct routes or if they can't land at the destinations where they want to go, they're not going to have much use for our products.

After 9-11, we learned the hard way that we can't take access to airspace and airports for granted.

Thanks to some good work by GAMA and some of the other associations, we are now back to pretty close—not quite—but pretty close to the same access we had before 9-11. We need to make sure that doesn't change as TSA and the Department of Homeland Security become an increasing factor in our lives and those of our customers.

One way to help ensure our continued access to airspace and airports is to make certain that our industry is as secure as possible and to make sure that the general public perceives us to be secure. That is why I think some of the proactive things our industry has done to enhance security—those things Ed outlined—are so important.

Stimulating New Sales

Among the things manufacturers can do to stimulate sales in a soft economy is to create incentives for individuals and companies to buy now.

Last year, GAMA lobbied for a provision that ultimately became law which allows accelerated depreciation to companies that buy airplanes before September 11, 2004. With a new tax bill now being debated in Congress, we are hoping to provide an even greater incentive for new airplane purchases.

Another great way to stimulate airplane sales is with new products and, in that respect, help is on the way. We are expecting several new airplane models to come to the market over the next couple of years from among others, Bombardier, Cessna, Dassault, Gulfstream and Raytheon.

I think the fact that so many companies are moving forward on development projects in a down economy speaks volumes about how manufacturers view the long-term prospects of this industry. It's clear we believe the future looks good.



Positioning for Future Growth

Over the course of the next year, GAMA is going to be spending a lot of time encouraging the federal government to do what it can to ensure that a bright future is realized.

Most of those things that need to be done are clearly set forth in the Final Report of the Commission on the Future of the U.S. Aerospace Industry. At its very foundation, the Commission Report asks our federal government to start making aerospace the national priority it deserves to be.

When Will the Recovery Begin?

Having just heard me say that the future looks good probably has some of you wondering when that future begins.

Well, we still see things being pretty flat in 2003. We have all established our production schedules and they are likely to only slightly increase, even if the economy immediately starts to grow at a healthy rate.

Historically, it takes about 9 to 12 months of economic growth before we start seeing a significant upturn in airplane sales. So, I don't think the 2003 numbers are going to look any better than the ones we are seeing tonight.

In addition to the economy improving, some of the used aircraft on the market need to be absorbed for there to be a significant increase in new aircraft sales. Increased absorption of used aircraft is always a key indicator of new aircraft sales.

As we look for growth, I also think people need to keep fractional ownership programs in perspective. These programs grew rapidly as the economy expanded and they, in essence, created a market that did not previously exist. But people need to understand that the fractional market is subject to the same forces as the rest of the basic aircraft market.

This means that fractional programs cannot be expected to grow in a soft economy at the same rate they did when the economy was strong. We simply need to keep expectations for fractional programs in line with market realities.



Strong Fundamentals

Despite today's challenges, manufacturers' optimism about the future is grounded in some key fundamentals. Among them is the fact that strong, well-capitalized companies are keeping their airplanes. As I mentioned earlier, general aviation airplanes have become integral to the management and communications strategies of many of our nation's most successful companies.

In addition, I would point out that most of the companies that own airplanes are flying them as much or more in the current environment as they ever have before. Ed mentioned that business jet activity was up last year and high utilization rates are a harbinger of future sales.

The global marketplace continues to generate a need for international travel. What we are seeing is that people and companies are increasingly concerned about security, particularly in international operations, and that concern is stimulating interest in business jets.

We are all aware that the deteriorating financial picture for many airlines is causing cuts in both service and frequency. These cuts are causing businesses to explore alternatives. For many companies, general aviation is likely to be their best option.

Finally, we are beginning to see tangible progress in key Asian markets like China. For years we have talked about the huge potential of Asia in general and China in particular. However, government policies have, to date, prevented general aviation from taking root in that part of the world. We still have a long, long way to go in China but there are strong indications that the government freeze on general aviation may be starting to thaw.



Conclusion

So, we have our challenges today. No doubt about it. But we also have opportunities. I am excited about being chairman of GAMA at this particular point in the history of our industry.

I also feel fortunate to have a very strong executive committee to help me direct GAMA's capable staff. Our Executive Committee includes my Vice Chairman, Clay Jones, who as most of you know, is the Chairman, President, and CEO of Rockwell Collins. It also includes the following committee chairs:

Lee Monson, President of Boeing Business Jets, is the chair of GAMA's International Affairs Committee. Dean Flatt, President and CEO of Honeywell Aerospace Electronic Systems, is the chair of our Flight Operations Policy Committee. Chuck Suma, President and CEO of The New Piper Aircraft, Inc., chairs our Legal Issues Committee. Jack DeCrane, CEO of DeCrane Aircraft Holdings, chairs our Public Affairs Committee. Mike Wolf, President of Lycoming Engines, chairs the Safety Affairs Committee. Gilles Ouimet, Chairman of Pratt & Whitney Canada, chairs the Technical Policy Committee. And finally, Jim Schuster, Chairman and CEO of Raytheon Aircraft Company, is the chairman of GAMA's newly formed Security Committee.

I think you'll agree with me that this is a pretty good team to take on the challenges we face as we count down to the 100 year anniversary of the Wright Brothers' flight at Kitty Hawk.

I have no doubt that by the time that anniversary arrives we, like the Wright Brothers before us, will be on our way to success.





GAMA 2002 STATISTICS

AIRPLANE SHIPMENTS BY TYPE: MANUFACTURED WORLDWIDE

| | 2001 | 2002 | Change |
|-----------------------------|---------|---------|--------|
| Single-Engine Piston | 1,644 | 1,446 | -12.0% |
| Multi-Engine Piston | 147 | 130 | -11.6% |
| Turboprops | 421 | 280 | -33.5% |
| Business Jets | 782 | 683 | -12.7% |
| Total Shipments | 2,994 | 2,539 | -15.2% |
| Total Billings | \$13.9B | \$11.9B | -14.4% |

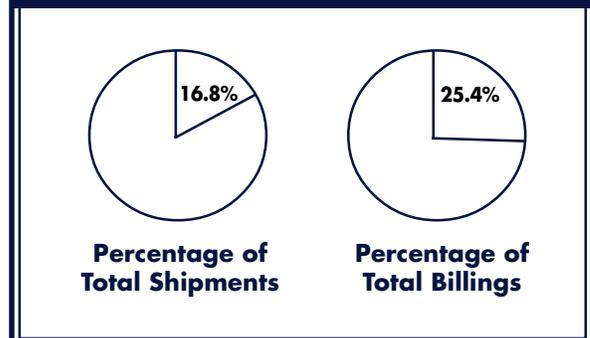
AIRPLANE SHIPMENTS BY TYPE: MANUFACTURED IN U.S.

| | 2001 | 2002 | Change |
|-----------------------------|--------|--------|--------|
| Single-Engine Piston | 1,581 | 1,366 | -13.6% |
| Multi-Engine Piston | 147 | 130 | -11.6% |
| Turboprops | 306 | 187 | -38.9% |
| Business Jets | 600 | 531 | -11.5% |
| Total Shipments | 2,634 | 2,214 | -15.9% |
| Total Billings | \$8.6B | \$7.8B | -9.9% |

EXPORTS

| | 2001 | 2002 | Change |
|------------------|--------|--------|---------|
| Shipments | 505 | 373 | - 26.1% |
| Billings | \$2.4B | \$2.0B | -16.8% |

INDUSTRY EXPORTS



Note: Airplanes are considered to be manufactured in the U.S. if they are produced under a FAA production certificate
Note: Exports reflect U.S. manufactured airplanes shipped outside the U.S.



GAMA MEMBER COMPANIES

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www.cessna.textron.com

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