

# Annual Industry Review & 2004 Outlook



*General Aviation Manufacturers Association*





## General Aviation Manufacturers Association

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.

### GAMA Staff

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**Fulfillment Coordinator**  
AUBREE J. FORAN

- Over 211,000 general aviation airplanes, ranging from two-seat training aircraft to intercontinental business jets, are flying in the U.S.
- General aviation directly contributes more than \$41 billion annually to the U.S. economy.
- 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 general aviation and the important role it plays both in the national economy and in serving the transportation needs of companies and individuals worldwide.





## 2004 Agenda

### PROMOTE SAFETY

Safety is the foundation of our industry and our association. Through its Safety Affairs Committee, GAMA will work with the FAA and the NTSB to identify adverse trends, develop and implement appropriate interventions, and widely disseminate important safety information.

### ENHANCE GA SECURITY

Since 9-11, the general aviation community has worked tirelessly to prevent inappropriate use of general aviation aircraft. While many recommendations have already been implemented, continuous improvement is necessary. Through its Security Issues Committee, GAMA will continue to work with industry groups, independent experts, and the federal government to identify and develop practical and effective solutions for enhancing general aviation security.

### PRESERVE ACCESS TO AIRPORTS AND AIRSPACE

The ban on general aviation flights at Reagan National Airport and the proliferation of Temporary Flight Restrictions (TFRs) are clear reminders that general aviation's access to airports and airspace cannot be taken for granted. In order to ensure general aviation continues to function as a vital link in our nation's transportation system, and a dynamic engine for our economy, GAMA will work to preserve GA access to airports and airspace and enhance underutilized general aviation airports.

### EXTEND BONUS DEPRECIATION

Bonus depreciation, which allows companies to depreciate up to 50 percent of their new general aviation airplane in the first year of ownership, has proven to be a powerful incentive for airplane sales. Unfortunately, bonus depreciation will expire on January 1, 2005, unless Congress acts to extend it. GAMA's top legislative priority for the year will be an extension of the bonus depreciation deduction and the elimination of its placed-in-service requirement.

### EXPAND AIR TRANSPORTATION CAPACITY

In order for aviation to reach its full potential and provide maximum benefit to the U.S. economy, the air transportation system must have sufficient capacity to meet projected demand. Through its Flight Operations Committee, GAMA will assist the FAA in implementing its Operational Evolution Plan (OEP). GAMA will also ensure the OEP is consistently updated to reflect technological advances, including those generated by new aircraft, engine and avionics designs.

### IMPROVE CERTIFICATION PROCESS

Through its Technical Policy Committee and participation in industry/government working groups, GAMA will constantly improve and refine the processes and standards used to certify aviation products. Aircraft certification standards and processes should be uniformly accepted throughout the world.

### FACILITATE AVIATION RESEARCH

General aviation manufacturers invest heavily in research and development. However, some high-risk, pre-competitive research is simply beyond the capacity of commercial enterprises. The federal government has historically played an important role in advancing this type of aviation research, but that role has declined in recent years. GAMA will work to reverse this negative trend by encouraging and facilitating NASA and FAA research in areas where technology roadblocks keep innovative products from coming to the general aviation market. Where appropriate, research funding for high-risk aviation research may be shared by multiple nations.

### FOSTER INTERNATIONAL MARKETS

Through its International Affairs Committee, GAMA will shape international aviation and trade policies so they foster the manufacture, sales and operation of general aviation airplanes around the world.

### ASSIST JOINT PLANNING AND DEVELOPMENT OFFICE

Acting upon a recommendation of the Commission on the Future of the U.S. Aerospace Industry, the federal government has established a Joint Planning and Development Office (JPDO) to transform our air transportation system to meet long-term needs. Achieving this vision requires a strong industry/government partnership. GAMA strongly supports the mission of the JPDO and will assist the organization in meeting its mandate.

### ADVOCATE BENEFITS OF GA

Many people are not fully aware of the benefits general aviation brings to their lives, regardless of whether or not they ever fly in a GA airplane. Through its Communications Committee, GAMA will educate policy makers, opinion leaders and the general public about the vital role general aviation plays in our national economy and air transportation system.



## 2003 Market Review

**ED BOLEN**  
*GAMA President & CEO*  
Washington, DC  
February 11, 2004

*"The reason the shipment numbers were able to remain constant in the face of declining billings was the strength of the piston-engine market."*

Those of you familiar with GAMA's Annual Industry Review and Outlook Briefing know that our format calls for me to review the key general aviation statistics from the year just ended. GAMA Chairman, Clay Jones, will then provide our outlook for the year ahead.

### Billings

Each year, we begin our review of the key statistics with a look at general aviation billings.

Total industry billings fell 15.5 percent in 2003 to \$9.99 billion.

Billings for only those general aviation airplanes manufactured in United States fell 16.7 percent to \$6.43 billion.

Although 2003 was the worst year for GA billings since 1998, it still ranks as the fifth best year for billings in the history of general aviation. That is a testament to the kind of growth this industry has experienced over the past decade.

### Shipments

Despite the nearly 16 percent drop in GA billings, total shipments of general aviation airplanes held steady at 2,686 units in 2003—down just one airplane from the previous year.

Shipments of U.S. manufactured general aviation airplanes fell 3.2 percent—from 2,207 planes in 2002 to 2,137 planes last year.

### Piston Shipments

The reason the shipment numbers were able to remain constant in the face of declining billings was the strength of the piston-engine market. Through the first three quarters of 2003, GAMA reported that piston shipments were only slightly ahead of 2002 totals. But with a very strong fourth quarter, piston shipments finished the year up a whopping 9.5 percent to a total of 1,896 airplanes.

Shipments of U.S. manufactured piston airplanes increased 6.3 percent to 1,590 units.

### Turboprop Shipments

Turboprop shipments were down 2.9 percent in 2003, to 272 units.

U.S. manufactured turboprops dropped 12.8 percent from 187 units in 2002 to 163 units in 2003.

### Business Jet Shipments

Business jet shipments fell substantially in 2003, down 23.4 percent to 518 units.

Shipments of U.S. manufactured jets were down 26.7 percent to 384 units.





The weakness in the business jet segment is the primary reason for the decline in GA billings.

In some respects, 2003 is almost the mirror opposite of 2001. You will recall that back then, a robust business jet market led to increased industry billings. But a weak piston airplane market caused total industry shipments to decline. This past year, just the opposite happened. Billings were down because of a weak business jet market, but total industry shipments were stable because of a strong piston market.

The lesson appears to be that business jets drive billings and piston airplanes drive shipments.

### Exports

Exports of U.S. manufactured general aviation airplanes fell again last year.

Billings for exported airplanes dropped 38.5 percent and the number of exported airplanes fell 9.7 percent.

For U.S. manufacturers, the export market accounted for 18.8 percent of their total billings and 15.7 percent of their total shipments.

### Employment

Although the economy continued to recover last year, job losses continued in

many industries. Unfortunately, general aviation was no exception. Employment at GAMA member companies fell in 2003, down 10.3 percent from their 2002 level.

### Used Airplane Market

The size of the used airplane market is a key gauge as to the strength of the general aviation market. The most concrete numbers available for used GA airplanes are those related to the turbine market.

According to statistics provided by AMSTAT, in December 2002 nearly 16 percent of the business jet fleet was on the market. In the spring, we saw the market balloon to about 18 percent before shrinking to about 15 percent by the end of the year. So the used market is now clearly moving in the right direction. However, it is still larger than its historical average of around 12 percent.

### Student Pilots

According to statistics provided by the FAA, student pilot population actually grew 1.5 percent in 2003. That is pretty impressive considering that in 2003 we had, among other things, a weak economy and war.

It seems Drew Steketee and his team at BE A PILOT are continuing to connect with prospective pilots with their great





*"...68 percent of the pilots hired by commercial airlines last year came from general aviation."*

ads on cable TV and seasonal promotions.

I would also point out that AIR, Inc. recently reported that 68 percent of the pilots hired by commercial airlines last year came from general aviation. So, the size of the student pilot population is not just important to the future of general aviation, but to our entire air transportation system.

### **Flight Activity**

Another encouraging statistic from 2003 comes in the area of flight activity.

Here again, the most concrete numbers the FAA has for 2003 are those related to business jet operations at the nation's large airports. In this category, flight activity was up approximately 1.2 percent.



### **Corporate Aircraft Operators**

According to statistics provided by AvData Inc., the total number of corporate operators worldwide increased approximately 4.3 percent last year. At the end of 2003 there were 14,555 corporate

operators in the world utilizing a fleet of 23,121 aircraft.

In the United States alone, there were 10,661 operators utilizing a fleet of 15,870 aircraft at the end of last year.



### **Fractional Ownership Programs**

Fractional ownership continued to grow in 2003. 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 6.7 percent last year from 4,232 to 4,515.

The number of airplanes in fractional programs grew just over 6.1 percent in 2003, from 776 to 823.

GAMA member companies are reporting that approximately 10 percent of their total turbine deliveries last year went to fractional programs.

### **Safety**

The NTSB's preliminary 2003 statistics on the number of general aviation accidents indicate that GA accidents increased by about one half of one percent. Fatal accidents were up just under two percent.

Although the NTSB's accident rates were not available at press time, we believe some of the increase in total accidents could be attributed to increasing activity in some segments of GA, especially during the last quarter of 2003.

## Security

Security remains a top priority for general aviation and presumably every other industry in the United States.

In 2003, the Transportation Security Administration (TSA) asked GAMA to co-chair a diverse working group on GA airport security. The group was composed of just about every general aviation association plus a number of GA airport managers and state aviation officials. The goal was to develop a catalog of possible security improvements that airport owners, tenants and aircraft operators might find useful in assessing security at their airport. The working group completed its work and presented its final report to the TSA in November. Copies of the report are available on GAMA's website.

In addition to detailing possible security improvements, the report also describes the numerous security improvements general aviation has already instituted. These programs include a nationwide, 24-hour, toll-free phone number to report suspicious activity at any GA airport, a trial program developed by NBAA for vetting and training for corporate pilots at selected airports, new requirements for screening passengers on chartered aircraft, procedures for controlling student pilots' access to aircraft at flight schools and methods of securing agricultural aircraft.

Specifically, GAMA developed guidelines that aircraft sellers can use to identify suspicious aircraft purchases.

No GA aircraft has ever been used in a terrorist attack and the general aviation community is determined to keep it that way.

## Legislation

Finally tonight, since this is Washington, I thought it might be appropriate to include in our annual review a look at the general aviation legislation that was passed last year.


Indeed, 2003 was a significant legislative year for general aviation.

In May, The Job Creation and Worker Assistance Act was signed into law. It included a substantial increase in bonus depreciation which has proven to be a major sales incentive for manufacturers. In fact, some GAMA Directors are calling bonus depreciation the most helpful legislation for GA sales since the General Aviation Revitalization Act.

We also passed a major FAA reauthorization bill that was extremely positive for general aviation. You have all heard the litany of pro-GA provisions in the bill—everything from formation of the Joint Planning and Development Office recommended by the Aerospace Commission to the Meigs legacy language pushed by AOPA.

## Conclusion

Looking back on 2003, it was clearly a challenging year for manufacturers. Still, there were some real bright spots—like the substantial increase in piston shipments—which we hope will prove to be the building blocks of a better 2004. ●



*"No GA aircraft has ever been used in a terrorist attack and the general aviation community is determined to keep it that way."*



GAMA President & CEO Ed Bolen with Senator Trent Lott (R-MS) and FAA Administrator Marion Blakey at a press conference supporting FAA legislation.



GAMA President & CEO Ed Bolen welcomes House Aviation Chairman John Mica (R-FL) to Wichita for a tour of general aviation manufacturing facilities.



Congressman Todd Tiahrt (R-KS) and Raytheon Aircraft Company Chairman & CEO Jim Schuster.



Clay Jones, Chairman, President & CEO of Rockwell Collins, discusses aviation issues with FAA Administrator Marion Blakey at a GAMA luncheon.



Admiral James Loy, Deputy Secretary of Homeland Security, meets with GAMA President & CEO Ed Bolen on general aviation security.



Senate Intelligence Chairman Pat Roberts (R-KS) discusses security issues at a GAMA Board of Directors meeting.



GAMA President & CEO Ed Bolen and Air Transport Association (ATA) President Jim May testify before the Senate Subcommittee on Aviation.



Senate Aviation Chairman Trent Lott (R-MS) addresses the GAMA Board of Directors.



GAMA President & CEO Ed Bolen on C-SPAN 2 discussing the final report of the Commission on the Future of the U.S. Aerospace Industry.





Jack Pelton, President & CEO of Cessna Aircraft Company (center) leads Congressmen Leonard Boswell (D-IA), Bill Shuster (R-PA), and Jerry Moran (R-KS) on a tour of the Cessna plant.

GAMA Chairman Clay Jones meets with President Bush at the White House.



Cirrus Design President & CEO Alan Klapmeier and Avidyne President Dan Schwinn show their products to Transportation Secretary Norm Mineta.



Congressman John Duncan (R-TN) and GAMA President & CEO Ed Bolen.



Bombardier Business Aircraft Vice President & General Manager Jim Ziegler, Congressman Jerry Moran (R-KS) and Bombardier Business Aircraft President Peter Edwards.



Congressman Norm Dicks (D-WA), GAMA President & CEO Ed Bolen, and U.S. Ambassador to ICAO Ed Stimpson.



Congressman Vernon Ehlers (R-MI) and Boeing Business Jet President Lee Monson.

GAMA President & CEO Ed Bolen and Transportation Secretary Norm Mineta host a meeting with manufacturers at AirVenture Oshkosh.



Wright Trophy recipients Al Ueltschi, Russ Meyer, Ed Stimpson and Sam Williams at a GAMA luncheon in their honor.



## 2003 Market Review

**CLAY JONES**

*GAMA Chairman*

Washington, DC

February 11, 2004

*"Manufacturers expect 2004 to be a year of stabilization that sets the stage for a period of sustained growth."*

The shipment and billing numbers just shared with you are hardly cause for celebration. But when you talk to the CEOs, you find they are generally upbeat and optimistic. Why?

Because we believe we are turning the corner on one of the most challenging market cycles in aviation history. Manufacturers expect 2004 to be a year of stabilization that sets the stage for a period of sustained growth. A number of factors support that belief.

### **Growing Economy**

The largest driver of general aviation sales has always been the economy—and the economy certainly appears to be on the rebound. Growth in the fourth quarter of '03 was particularly strong and most economists are projecting this year's growth rate to be around four percent.

Honeywell has studied the data and they have found empirical evidence showing airplane sales strengthen when the economy grows in excess of three percent over an extended period—roughly three consecutive quarters. If that model holds and the economy grows as expected, it certainly bodes well for our industry's prospects.

### **Increasing Orders**

Another reason for our optimism is that orders for new aircraft are already

picking up. We really began to see an up turn in orders last June when bonus depreciation was increased to 50 percent and we believe the incentive is continuing to stimulate sales.

The OEMs all have numerous examples of bonus depreciation causing customers to accelerate the timing of their purchase, to buy new rather than used, or in some cases, buy a larger model than they originally considered. Because bonus depreciation has had such a positive impact on sales, extending the incentive beyond the current year is GAMA's top legislative priority for the year.

### **Strong Piston Shipments**

It is also a very good sign that piston shipments are up. Pistons were the first segment of general aviation to feel the downturn in 2001. We believe the impressive strength of the piston segment in 2003 is an early indicator of a broader turnaround in all segments of general aviation.

### **Improving Used Market**

A reduction in the number of newer business jets available in the used market is also a positive indicator. In his presentation, Ed gave some statistics on the total used business jet market. But when OEMs look at the used market, they primarily focus on just the number







of relatively new aircraft for sale—those planes less than about 8 to 10 years old.

Either because of their high operating costs or the amount of money that would be required to update the older aircraft to meet current regulations like Reduced Vertical Separation Minima (RVSM), many of the older used aircraft are not really viewed as competition for new models. In fact, some of the older used aircraft are unlikely to ever return to the active fleet.

As of December, only about 20 percent of the used jet market was comprised of aircraft less than 10 years old—which is not too far out of line with historical figures. Moreover, the prices of these newer used jets have stabilized so the gap between used and new has narrowed and that is a positive development.

### Reasonable Alternative

The increased amount of time it takes to fly on commercial airlines is a macro trend that we believe will drive general aviation sales in the future. Traffic to and from congested airports, long check-in and/or security lines, reductions in flight frequencies and the elimination of service to many smaller communities are all combining to make it more difficult for people to rely on commercial airlines to meet their need for time-sensitive travel. We think general aviation offers these travelers a practical solution.

Many people also appreciate the inherent security attributes of general aviation, including the established relationships with fellow passengers.

### International Development

General aviation will also be helped by the push for economic development in emerging countries. China is a good example. The Chinese government has said that it would like to promote the economic development of Western China. The problem they face is that Western China does not have a strong highway or railroad system.

In this situation it makes sense for the Chinese to look to aviation for economic development. Building airports is faster and less expensive than developing extensive highway and rail systems, and the Chinese understand this. In fact, they have announced plans to dramatically expand their airport infrastructure by building nearly 100 new airports over the next six years.

General aviation is not going to boom overnight in Asia, but it will grow and it will ultimately grow significantly. The benefits associated with general aviation are simply too great for countries like China to ignore over the long haul.

### Meeting Customer Needs

Finally, of all the fundamentals that point toward a bright future for general aviation, the one that I am the most excited about is the way this industry is rapidly adapting to meet the changing needs and expectations of our customers.

You know, it wasn't that long ago that the full spectrum of general aviation aircraft was fairly narrow. Ten years ago we were not a "one-size fits all industry" but we were pretty limited in our offerings. There were pistons, turboprops and only



about three categories of business jets. And there were just a couple of production models in each of these categories. Things are different today.

## New Technologies

In the piston market, for example, there are not just new models of aircraft but new companies building them. We are also seeing new materials and dramatically improved avionics including glass cockpits and PFDs. Today's piston planes have more CNS capability than some of the jetliners did ten years ago.

In the business jet market, the spectrum of airplanes has been pulled at both ends; with new entry level jets on one side and ultra long range aircraft and bizliners on the other.

That spectrum is going to get stretched even more in 2006 when the so-called microjets begin coming to the market.

The product spectrum has also filled-in significantly, with new categories squeezing between existing ones.

## Utilization Options

When you combine this wide range of aircraft with evolving ownership and utilization options like fractional programs and jet cards or even the innovative shared-ownership programs that are developing for piston planes, you begin to see an industry that can offer its customers options that are more tailored to their particular needs.

By providing people more customized solutions to their travel needs, we believe general aviation is becoming a more practical and relevant form of transportation to an even broader section of the general population.

That is great news for everyone. General aviation enables greater individual mobility—and greater individual mobility means more economic development, better communications, and stronger relationships.

## Challenges

Of course, the future growth of general aviation cannot be taken for granted—good things don't happen without effort and vigilance. We need only look as far as Reagan National Airport or the Washington Air Defense Identification Zone (ADIZ) to see just how threatened our access to airports and airspace is. If the ban on general aviation at Reagan Nation Airport or restrictions in the Washington ADIZ begin to multiply, they could really decimate this industry.

## Conclusion

Challenges like these underscore why it is imperative for general aviation to have a strong and effective lobby. I am pleased that this year, in addition to GAMA's talented professional staff, I will be working with an outstanding executive committee that is committed to improving the overall health of the industry.

And as you all know, GAMA is not alone in its efforts to promote aviation. I am encouraged by the superb working relationships GAMA has with the other aviation associations in the General Aviation Coalition and the Aviation and Space Stakeholders Coalition. We have the presidents of some of those associations with us tonight and I want to assure them of our continued support and cooperation as we work together to promote aviation in the United States and around the world. ●

*"By providing people more customized solutions to their travel needs, we believe general aviation is becoming a more practical and relevant form of transportation to an even broader section of the general population."*







## 2004 Committee Chairs



**CLAYTON M. JONES**  
*Chairman*  
Chairman, President and CEO  
Rockwell Collins, Inc.



**JAMES E. SCHUSTER**  
*Vice Chairman & Security Issues Committee*  
Chairman and CEO  
Raytheon Aircraft Company



**JOHN G. ROSANVALLON**  
*Communications Committee*  
President and CEO  
Dassault Falcon Jet Corporation



**DEAN M. FLATT**  
*Flight Operations Policy Committee*  
President  
Honeywell Aerospace Electronic Systems



**LEE D. MONSON**  
*International Affairs Committee*  
President  
Boeing Business Jets



**CHARLES M. SUMA**  
*Product Liability & Legal Issues Committee*  
President and CEO  
The New Piper Aircraft, Inc.



**ROBERT A. BARRETT**  
*Safety Affairs Committee*  
President  
PerkinElmer Fluid Sciences



**PETER G. EDWARDS**  
*Technical Policy Committee*  
President  
Bombardier Business Aircraft



## GAMA Statistics

### AIRPLANE SHIPMENTS BY TYPE: MANUFACTURED WORLDWIDE

	<u>2002</u>	<u>2003</u>	<u>Change</u>
<b>Single-Engine Piston</b>	1,601	1,825	14.0%
<b>Multi-Engine Piston</b>	130	71	-45.4%
<b>Turboprops</b>	280	272	-2.9%
<b>Business Jets</b>	676	518	-23.4%
<b>Total Shipments</b>	2,687	2,686	0.0%
<b>Total Billings</b>	\$11.82B	\$9.99B	-15.5%

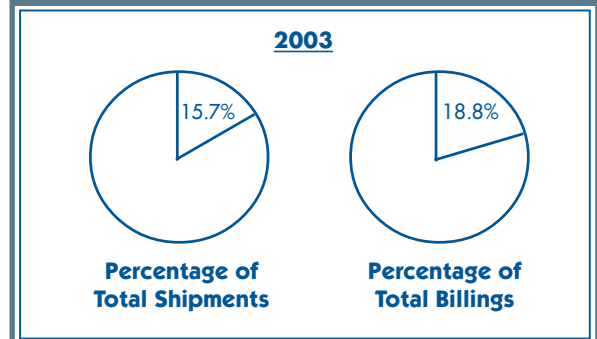
### AIRPLANE SHIPMENTS BY TYPE: MANUFACTURED IN U.S.

	<u>2002</u>	<u>2003</u>	<u>Change</u>
<b>Single-Engine Piston</b>	1,366	1,519	11.2%
<b>Multi-Engine Piston</b>	130	71	-45.4%
<b>Turboprops</b>	187	163	-12.8%
<b>Business Jets</b>	524	384	-26.7%
<b>Total Shipments</b>	2,207	2,137	-3.2%
<b>Total Billings</b>	\$7.72B	\$6.43B	-16.7%

### EXPORTS

	<u>2002</u>	<u>2003</u>	<u>Change</u>
<b>Shipments</b>	372	336	- 9.7%
<b>Billings</b>	\$1.98B	\$1.22B	-38.5%

### 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.*





## Member Companies

### Aircraft Technical Publishers

101 South Hill Drive  
Brisbane, CA 94005-1203  
(415) 330-9500  
www.atp.com

### Airtechnics, Inc.

3851 North Webb Road  
Wichita, KS 67226  
(800) 544-4070  
www.airtechnics.com

### Argo-Tech Corporation

23555 Euclid Avenue  
Cleveland, OH 44117-1795  
(216) 692-6227  
www.argo-tech.com

### Avidyne Corporation

55 Old Bedford Road  
Lincoln, MA 01773  
(781) 402-7400  
www.avidyne.com

### B/E Aerospace, Inc.

4000 N.W. 36 Avenue  
Miami, FL 33142  
(305) 633-6817  
www.beaerospace.com

### Boeing Business Jets

P.O. Box 3707, M/S 1E-77  
Seattle, WA 98124-2207  
(206) 655-9800  
www.boeing.com/commercial/bbj/

### Bombardier Aerospace

P.O. Box 6087  
Station Centre-ville  
Montreal, Quebec  
CANADA H3C 3G9  
(514) 855-7977  
www.aerospace.bombardier.com

### CAE SimuFlite

2929 West Airfield Drive  
P.O. Box 619119  
DFW Airport, TX 75261  
(800) 527-2463  
www.simuflite.com

### Century Flight Systems, Inc.

Municipal Airport  
P.O. Box 610  
Mineral Wells, TX 76068  
(940) 325-2517  
www.centuryflight.com

### Cessna Aircraft Company

P.O. Box 7706  
Wichita, KS 67277-7706  
(316) 517-6000  
www.cessna.com

### Cirrus Design Corporation

4515 Taylor Circle  
Duluth, MN 55811  
(218) 727-2737  
www.cirrusdesign.com

### Crane Aerospace & Electronics

3000 Winona Avenue  
Burbank, CA 91504  
(818) 526-2600  
www.crane-aerospace.com

### Dassault Falcon Jet Corporation

P.O. Box 2000  
South Hackensack, NJ 07606  
(201) 440-6700  
www.falconjet.com

### Diamond Aircraft Industries

1560 Crumlin Sideroad  
London, Ontario  
CANADA N5V 1S2  
(519) 457-4000  
www.diamondair.com

### DeCrane Aircraft Holdings, Inc.

2361 Rosecrans Avenue, Suite 180  
El Segundo, CA 90245  
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### FlightSafety International, Inc.

Marine Air Terminal  
LaGuardia Airport  
New York, NY 11371-1061  
(718) 565-4100  
www.flightsafety.com

### GARMIN International, Inc.

1200 East 151st Street  
Olathe, KS 66062  
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### Hartzell Propeller Inc.

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P.O. Box 21111  
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Montgomery, AL 36116  
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### L-3 Communications

**Avionics Systems**  
5353 52nd St. SE  
Grand Rapids, MI 94512  
(616) 949-6600  
www.L-3com.com/as

### Lycoming Engines

652 Oliver Street  
Williamsport, PA 17701  
(570) 323-6181  
www.lycoming.textron.com

### Meggitt Avionics/S-TEC

One S-TEC Way  
Mineral Wells, TX 76067-9236  
(940) 325-9406  
www.s-tec.com

### Mooney Aerospace Group, Ltd.

Louis Schreiner Field  
Kernville, TX 78028  
(830) 896-6000  
www.mooney.com

### The NORDAM Group

510 S. Lansing  
Tulsa, OK 74120  
(918) 587-4105  
www.nordam.com

### Parker Hannifin Corporation

14300 Alton Parkway  
Irvine, CA 92618-1898  
(949) 833-3000  
www.parker.com

### PerkinElmer Fluid Sciences

11642 Old Baltimore Pike  
Beltsville, MD 20705  
(301) 937-8811  
www.perkinelmer.com

### Piaggio Aero Industries S.p.A.

1515 Perimeter Road  
West Palm Beach, FL 33406  
(561) 253-0104  
www.piaggioaero.com

### The New Piper Aircraft, Inc.

2926 Piper Drive  
Vero Beach, FL 32960  
(561) 567-4361  
www.newpiper.com

### PPG Aerospace

P.O. Box 1800  
Glendale, CA 91209  
(818) 240-2060  
www.ppg.com

### Pratt & Whitney Canada

1000 Marie-Victorin Boulevard  
Longueuil, Quebec  
CANADA J4G 1A1  
(450) 677-9411  
www.pwc.ca

### Precision Aerospace Corporation

1100 Carillon Point  
Kirkland, WA 98033  
(425) 739-9997  
www.prec-aero.com

### Raytheon Aircraft Company

P.O. Box 85  
Wichita, KS 67201-0085  
(316) 676-7111  
www.raytheonaircraft.com

### Rockwell Collins, Inc.

400 Collins Road NE  
Cedar Rapids, IA 52498-0001  
(319) 295-1000  
www.rockwellcollins.com

### Rolls-Royce North America

14850 Conference Center Drive  
Suite 100  
Chantilly, VA 20151  
(703) 834-1800  
www.rolls-royce.com/northamerica/

### Sabreliner Corporation

Pierre Laclede Center  
7733 Forsyth Boulevard  
Suite 1500  
St. Louis, MO 63105-1821  
(314) 863-6880  
www.sabreliner.com

### Safe Flight Instrument Corporation

20 New King Street  
White Plains, NY 10604-1206  
(914) 946-9500  
www.safeflight.com

### Smiths Aerospace Actuation Systems - Yakima

P.O. Box 9907  
Yakima, WA 98909-0907  
(509) 248-5000  
www.smiths-aerospace.com

### Teledyne Continental Motors

P.O. Box 90  
Mobile, AL 36601-0090  
(251) 438-3411  
www.tcmlink.com

### Teledyne Controls

12333 West Olympic Boulevard  
Los Angeles, CA 90064  
(310) 820-4616  
www.teledyne-controls.com

### Unison Industries

7575 Baymeadows Way  
Jacksonville, FL 32256  
(904) 739-4000  
www.unisonindustries.com

### Universal Avionics Systems Corp.

3260 East Universal Way  
Tucson, AZ 85706  
(520) 295-2300  
www.uasc.com

### Williams International

P.O. Box 200  
Walled Lake, MI 48390-0200  
(248) 624-5200  
www.williams-int.com

### Woodward Governor Company

P.O. Box 7001  
Rockford, IL 61125-7001  
(815) 877-7442  
www.woodward.com