

GENERAL AVIATION MANUFACTURERS ASSOCIATION

Before the

NEW YORK SOCIETY OF SECURITY ANALYSTS

New York City January 12, 1979

By
Edward W. Stimpson
President
GAMA

Clare I. Rice
Chairman of the Board
GAMA and
President
Avionics and Missiles Group
Rockwell International

Karen S. Coyle Mgr. TakeOff Program GAMA

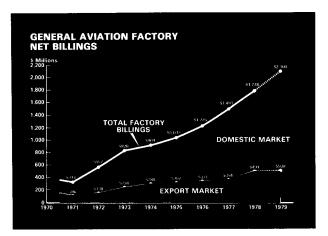


REMARKS BY EDWARD W. STIMPSON President, General Aviation Manufacturers Association

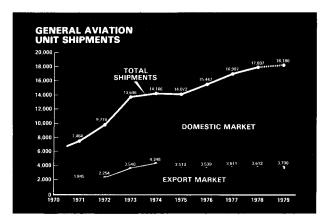
The appearance of the General Aviation Manufacturers Association before the New York Society of Security Analysts has become something of an annual tradition, and we are glad to be here again this year in your new headquarters. The tradition is the presentation of our industry's results for the year just ended, and the unveiling of GAMA forecasts for the year ahead.

General Aviation, as you know, is all flying except for the airlines and the military. According to FAA figures, there are almost 200,000 general aviation aircraft, which represent about 98.7% of the civil aircraft fleet. Our Association represents 37 companies who manufacture over 90% of the aircraft, engines, avionics and pilot supplies for the industry.

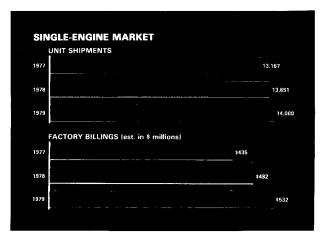
With me here today is Mr. Clare I. Rice, the President of Collins Avionics and our Association's chairman for 1979. Mr. Rice will discuss critical safety and airport issues, two topics of paramount concern to our industry. We will also hear from Miss Karen Coyle, Manager of GAMA's TakeOff Program, a nationwide initiative designed to increase the number of general aviation pilots. TakeOff is now in its third and final year, and Miss Coyle will supply a progress report on the results so far.



I am pleased to announce that 1978 marked the seventh consecutive year in which general aviation posted record aircraft billings. Further, in 1979 we are expecting another record year. We closed the year with \$1.78 billion in sales, which is up 19.2% from 1977 when billings were 1.5 billion. We also exceeded our forecast of more than a year ago by \$78 million. Shipments totalled 17,808, exceeding 1977 shipments by 901 units, and giving us deliveries virtually identical with our forecast.

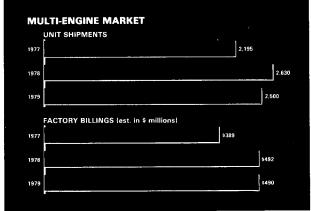


In December 1978, we also had a record month with deliveries topping \$204 million. This dollar value was based on the delivery of 281 multi-engine pistons, 65 turboprops and 30 jets. Now let's review by market segments what our industry accomplished during 1978 and what we are forecasting for 1979.

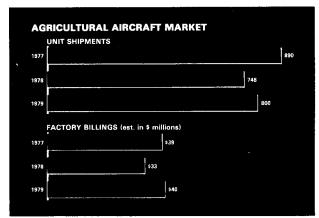


Single Engine: During 1978, our industry posted single engine factory net sales of \$482 million, up 10.8% from 1977, on deliveries of 13,651 units. In 1979, we expect the single engine market to produce factory net billings of \$532 million, up 10.4%.

That would represent shipments of 14,000 single engine airplanes. New training aircraft will continue to be introduced, and recently introduced high-performance single-engine aircraft—offering such features as pressurization and all-weather equipment—have contributed to the growth of this market segment. We expect this trend to continue.

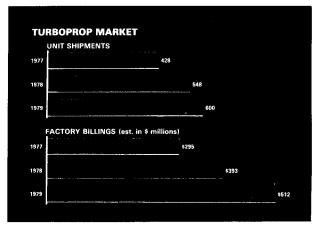


Multi-Engine Piston: In 1978, this market segment showed good gains over 1977. Shipments provided factory net billings of \$492 million, up 26.5%, and we delivered 2,630 new multi-engine piston powered aircraft in 1978, 230 more than forecast. We see dollar billings for 1979 of \$489 million in this category, with shipments at 2,500 new multi-engine aircraft. However, in view of the recent strong performance of multi-engine aircraft, and the introduction of new models, we believe our forecast could be conservative.

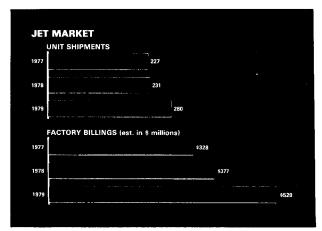


Agricultural Aircraft: In 1978 we ended the year below forecast with sales of \$33 million and 748 units delivered, down from \$37 million and 890 aircraft in

1977. For 1979, we are forecasting an increase in factory billings to \$40 million and 800 units in the agricultural category. The market condition reflects the continued depressed state of agricultural economics. But we still firmly believe this is an excellent market in the long term, since the potential of the agricultural airplane in worldwide food production is virtually unlimited. Just last month, while leading a U.S. Aviation trade delegation in Africa, I was made aware of the growing interest and tremendous potential by officials and private businessmen in several developing nations on that continent.



Turboprop: In 1978 turboprop aircraft accounted for \$393 million, up 33.2%, in factory net billings, with deliveries of 548 units. Our turboprop forecast for 1979 is for \$512 million, an increase of 30.3% on sales of 600 aircraft. Last year, four new turboprop models were introduced. We expect continued healthy sales from the business and commuter segments in this market.



Turbojet: Our 1978 turbojet sales totalled billings of \$377 million, up 14.9% in dollars from 1977 on 231 units. For 1979, we are predicting turbojet dollar billings of \$521 million, up 38.2% over 1978, with 280 shipments expected. Turbojet aircraft continue in heavy demand, reflecting the steadily growing reliance of U.S. and overseas business firms on their fleets of high speed, over-the-weather jets for reliable basic company transportation. The arrival of larger, even faster, and higher-flying aircraft on the scene in this market segment has resulted in a strong backlog of orders. I should note that we ended the year below our forecast on turbojets primarily because of production obstacles, not market conditions. As you can see from our forecasts for 1979, we expect those obstacles to be largely overcome.



1979 Industry Forecast: Putting it all together, our GAMA total industry forecast for 1979 is as follows: We expect factory billings to reach \$2.1 billion, an increase of 18.1% over 1978, on delivery of 18,180 new aircraft.

1979 GAMA SALES FORECAST
SINGLE-ENGINE PISTON
JET
TURBOPROP
MULTI-ENGINE PISTON \$490 Million
AGRICULTURAL \$ 40 Million
TOTAL \$2.1 Billion

1979 GAMA SHIPMENT FORECAST SINGLE-ENGINE PISTON. 14,000 MULTI-ENGINE PISTON. 2,500 AGRICULTURAL 800 TURBOPROP 600 JET 280

Key Factors Influencing 1979 Outlook: 1) The number of airports served by scheduled air carriers is dwindling. On October 24, 1978, only 385 points were served by the domestic airlines. Of those, 219 received service from just one carrier. The Civil Aeronautics Board has now tentatively identified 65 additional airports that may lose airline service as a result of the airline deregulation act. Already, the airlines have filed to drop 18 on this list. This trend is a major factor stimulating the growth of business aviation.

- 2) More and more companies are using business aviation. Of the "Fortune 1000" companies, 514 now operate a fleet of 1,778 aircraft. This figure is up from 502 companies a year ago. More significantly, there has been a 26.5% increase from 1969 in the number of major firms that have purchased their own aircraft. In terms of net sales, assets, net income, stockholder equity, the corporations with aircraft perform significantly better than those without business aircraft.
- 3) There has been continued improvement of general aviation products across the board, from the single engine trainer to the business jet. This improvement has meant increased reliability, expanded fuel efficiency, more cost effectiveness, and better utilization, while at the same time providing improved environmental compatibility.
- 4) The growth of the commuter market has enhanced the outlook for our industry. The airline deregulation act placed heavy emphasis on the development of commuter services. Subsidies have been made available for the first time to commuter airlines, and government guaranteed loans for the purchase of aircraft are now available to commuter operators. In addition, the FAA has issued new standards increasing both the safety and the carrying

capacity of commuter aircraft. Last year commuter airlines carried 9.2 million passengers, up 17% from 1977, and cargo was up 28%. For 1979 the prospect is for a similar or improved increase. The legislation also gave the commuter airlines mandated joint fares which will substantially increase both revenues and profitability.

5) The international market place for general aviation offers both opportunities and obstacles. In 1978, exports accounted for 490 million dollars, or 27.6% of the dollars and 20.3% of the units.

Trade barriers erected by a number of countries continue to seriously hamper our export market. Brazil, Japan, Mexico, and the Philippines are the chief problems. If some of these barriers can be removed, through positive actions on the part of our own government, or through multi-lateral negotiations, it would have an extremely beneficial effect on U.S. general aviation exports. Also, it is difficult for us to understand why export licenses for our industry are delayed by the U.S. government—for human rights and other considerations-at a time when our nation faces record trade deficits. Such delays, imposed through the bureaucracy, threaten the growth of our industry abroad. But there is hope on the international scene. We see the possibility of multi-lateral negotiations resulting in the worldwide free trade of civil aircraft. This should mean zero tariffs on aircraft and the discouragement of non-tariff barriers throughout the free world.

This year, 1979, will be the industry's first 2-billion-dollar year. Only four years ago in 1975, we reached our first billion-dollar year. Consequently, you can see how far we have come in just four years.

To give you a program report on one of the active programs we have to insure our growth, Karen Coyle:

REMARKS BY KAREN COYLE MANAGER, GAMA TAKEOFF PROGRAM

The TakeOff program is the largest industry-wide flight training promotion ever undertaken by the general aviation industry. It was started on January 1, 1977, with a planned time span of three years. GAMA, as program sponsor, directed its efforts toward increasing the number of active pilots . . . a need demonstrated by the large number of forecast retirements from the scheduled airlines and corporate aviation, plus a plateau in the number of student pilots.

The student pilot marketplace had been static for the 10 years prior to TakeOff. New pilots entering the system, and older pilots who dropped out of flying for medical or other reasons, balanced out. The result was a plateau in the number of pilots, while the general aviation industry itself, in terms of aircraft sales and utilization, continued to grow.

To provide a healthy market base, and the pilots for future growth, GAMA launched TakeOff.

During the past 2 years of the program, TakeOff has become a nationwide byword in flight training. Every avenue of communications has been explored to promote flight instruction.

The results of this concentrated campaign are impressive. All factors indicate that TakeOff has made significant impact on the flight training marketplace. During 1977, we saw an increase of over 7% in the number of new student pilots. The conversion ratio of student to licensed private pilot increased from its traditional 40%, to 46%.

Calls for information about flight training, to a special nationally advertised toll-free number, exceeded our original forecast by over 200%.

1978 produced even better results. For example, the sale of student pilot instructional kits, sold individually to each new pilot, has consistently increased. At present, figures indicate an increase of over 7%.

Two surveys were conducted independently on the information service, recontacting people who had called the toll-free number. The results: Over 33% of the 70,000 persons who called TakeOff last year signed up for flight training. More importantly, the conversion ratio from student to private pilot has now topped 50%. The number of flight schools participating in the program has increased since 1977 by over 26% to a present total of 2,000.

TakeOff has proven that interest among Americans in learning to fly is immense.

Each new student pilot contributes an estimated \$1,500 to \$2,000 toward the flight training industry which presently is grossing some \$200 million annually.

During the final year of TakeOff, we will continue with our efforts through the mass media and through the 2,000 flight schools participating. We expect to end 1979 with an even more significant increase in licensed pilots, ensuring the continuity of the air transport system and also its healthy growth.

REMARKS BY CLARE I. RICE CHAIRMAN OF THE BOARD, GAMA

Karen and Ed have given you an excellent overview of the state of the general aviation industry as it stands right now.

However, our industry is aggressively dealing with a major issue which has been rather harshly illuminated by the tragic collision at San Diego.

The issue is called safety . . . but in fact the real issue is not safety, but the public perception of aviation safety.

Safety in the air is an endeavour so worthwhile that it should always be pursued for its own sake and therefore should always remain an issue. Safety is the keystone to the success of general aviation as a viable and growing means of transportation. After all, general aviation transports more than 110 million people every year. Both general aviation and the airlines are extremely safe transportation modes . . . and all in the industry generally recognize this . . . far better than the public recognizes this fact. The two modes are compatible and complementary . . . the existence and activities of each benefit the other. And both benefit the public, and our social and economic system, in innumerable ways.

But, as the aftermath of the San Diego tragedy sadly reminds us, if the public perceives flying as unsafe . . . the potential impact on our industry is the same as if we really were unsafe, and that's the issue we're dealing with at the present time.

Subsequent to the San Diego tragedy, the public has been legitimately concerned about safety in the air. Obviously, the FAA has felt considerable pressure to do something . . . anything . . . to prevent another midair collision.

So, the FAA has announced a multi-faceted program dealing with the problems illuminated by San Diego.

The proposal includes several measures purported to reduce the potential for mid-air collisions . . . Among these are:

- Increasing the amount of airspace under positive control by ground-based controllers.
- Creating more terminal radar service areas and terminal control areas.
- And installing 24 new instrument landing systems at reliever airports near hub airports.

Only the last measure is a direct attack on the problems and conditions which led to the collision at San Diego. The others will do little to reduce the risk of a San Diego-type air collision in terminal areas. The president of the Air Line Pilots Association has publicly stated that even if the FAA proposals had been implemented prior to the San Diego collision, they would not have prevented the accident . . . and FAA officials have confirmed this.

It is my impression that this is a hastily conceived proposal that doesn't solve existing problems. If the government wants to take rapid effective action, there is something that can be done immediately.

The core of the real problem is airport capacity and congestion around the major airports. Airport congestion stems from two factors . . . First, is the growth of air travel in both general and commercial aviation.

Compounding the impact of this growth is the second factor . . . Airlines are serving fewer airports. And this trend will continue as the impact of airline deregulation spreads and as the airlines further concentrate their service in the mass travel markets.

The result . . . more traffic at major hub airports with an increasing dependence of trunk and regional air carriers on commuter airlines and general aviation to deliver passengers to these hubs.

This leads to many airports operating with overloaded runway and terminal airspace capacity.

So what we need immediately is not more restriction and control of travel between airports . . . the problem is not there. . .

We need more general aviation runways at hub airports ... we need upgraded facilities at existing reliever airports — like Teterboro and Republic are to La Guardia, Newark and JFK — as well as new reliever airports. And we need access to under-utilized military fields. These steps would contribute to immediate relief of the congestion which is the real problem ... and, in fact, a safety hazard which the FAA proposal nearly ignores.

It is extremely ironic that the core problem — airport capacity — is not being dealt with when more than two billion unspent and uncommitted dollars are available now to alleviate that problem.

Since 1970, the Airport/Airways Trust Fund ... collected in the form of user charges paid by the airlines, air travelers and general aviation aircraft operators ... has amassed this huge surplus of two billion dollars. If this money had been spent for its stated purpose over the past eight years, it would have created facilities which would have by now alleviated much of the present congestion problem and its attendant collision hazard.

The users include you and everybody who flies. Every time you spend 100 dollars for an airline ticket, eight of those dollars goes into the trust fund. Multiply that figure by the millions of airline tickets purchased each year — plus the money contributed by the Airlines and general aviation — and you can see why the Airport/Airways trust fund surplus has passed the two billion dollar figure within eight years.

For the safety of the American traveling public ... we need those reliever airports ... we need them equipped with instrument landing systems ... we have needed them since 1970 when the trust fund was set up ... and we need them now.

But, since 1970, only five new airports have been constructed to reduce light aircraft traffic at major airports. And currently, only 147 airports are classified as reliever airports.

Of these 147 airports, only 29 are equipped with instrument landing systems, which would make them usable in adverse weather, and for instrument flight training.

The FAA has proposed to add only 24 more ILS installations. These systems cost only about \$250,000 installed. Which means that every reliever airport in the country could be so equipped without even making a dent in the uncommitted trust fund surplus.

To put this in a different perspective . . . the annual interest earned on this surplus would pay for nearly one thousand ILS systems.

This industry must set top priority on working to see that this two billion dollar trust fund surplus is spent as it was meant to be spent ... and to demand that the federal and state and local organizations responsible for operating our nation's airways and airports focus their energies on solving real problems that exist now. And we at GAMA are not alone ... other interested and informed associations concur that the FAA proposal does not deal with the problem as it really exists.

What concerns us is that a hasty and not very well thought out solution may be adopted and turn out not to be a solution at all in the emotional climate surrounding a tragedy.

True, in the wake of San Diego there is a heated emotional climate, public concern and demands for action. But reasonable men reasoning together ... working together ... can and will produce sound solutions that will stand the harsh test of operational implementation. That is, even greater safety for all users of our nation's airspace.

We certainly support the idea of providing more radar service for the protection of airline passengers — and general aviation passengers — and we believe this can be done without imposing the restrictive rules proposed by the FAA. We will make counter-proposals to the FAA which will accomplish this purpose without restricting the use of general aviation airplanes. We want a balanced program that deals with the total safety problem, rather than a poorly conceived program aimed at the problem of the moment.

To reach the goals that the aviation industry and the public both want, we must not yield to the temptation to over-react to uninformed public opinion. We do object — and object strongly — to quick reactions which are not really solutions. The national transportation system and its beneficiaries will be best served in both the short and long terms by a more rational approach to the real, fundamental problems than those we have seen to date.

The challenge exists, and we're working vigorously to meet it. The General Aviation Manufacturers Association intends to pursue the issue of safety in the air with sound, sensible, achievable solutions . . . while continuing to supply the needs of general aviation with the world's finest aircraft and equipment. I know that next year's report will have the same success story we have brought to you in the past several years.



EDWARD W. STIMPSON

Edward W. Stimpson is president and a board member of the General Aviation Manufacturers Association (GAMA), headquartered in Washington, D.C. He joined the association when it was formed on January 1, 1970, and was elected president in November of that year.

Mr. Stimpson served with the Federal Aviation Administration in Washington from December of 1962 until he joined GAMA. He was named FAA's assistant administrator for congressional liaison in July, 1965.

In 1977, he was named "General Aviation Man of the Year." He also received the U.S. Department of Transportation Meritorious Achievement Award, FAA's Meritorious Service Award, and its Decoration for Exceptional Service in recognition of his performance.

Before his federal government service, Mr. Stimpson was acting director of the Pacific Science Center Foundation at Seattle, Washington, where he developed and administered a program to convert the U.S. Science Pavilion at the Seattle World's Fair into a permanent Science Center.

Mr. Stimpson was born on June 18, 1934 in Bellingham, Washington, and was graduated Cum Laude from Harvard College in 1956. He is a private pilot.



KAREN S. COYLE

Karen Coyle is a veteran pilot at 22, active flight instructor, and manager of a national program to generate interest in learning to fly. In fact, the scope of the program she runs is unprecedented in the history of general aviation. Karen's job keeps her flying about 10 days a month — but she'd prefer even more flight time as she works toward her air transport rating. Spare time, however, is hard to find.

As manager of the TakeOff program for the General Aviation Manufacturers Association, she directs a \$300,000 sweepstakes for new pilots that is awarding six new airplanes worth \$50,000 each during a three-year period that ends Dec. 31, 1979. By that time, the general aviation industry hopes there will be 300,000 more licensed pilots in the U.S. and Canada, many of whom are needed for aviation duties in business, industry and government.



CLARE 1. RICE

Clare I. Rice is President of the Avionics and Missiles Group of Rockwell International. This includes the Collins General Aviation Division, which manufacturers communication, navigation and flight control systems for general aviation aircraft. He is the senior Rockwell executive in Cedar Rapids, Iowa, where 10,000 Rockwell employees are located.

Mr. Rice holds a Bachelor of Science degree in Electrical Engineering from the University of Wisconsin, and a law degree from the Saint Paul College of Law. He is a registered professional engineer in Minnesota and the District of Columbia. He began his aviation career with the U.S. Navy during World War II and is a retired Lieutenant-Commander in the U.S. Naval Air Reserve. He has extensive experience in aviation electronics, having held engineering, marketing, and general management positions with Northwest Airlines, Aeronautical Radio, Inc., and the Bendix Corporation.

He joined Collins in 1968, was appointed Vice President-Aviation Marketing in 1969. In 1972 he was named Vice President and General Manager of the Collins Avionics Division. In 1977 he was appointed President of the newly formed Collins Avionics Group, and later in the year President of the expanded Avionics and Missiles Group of Rockwell International.

U.S. GENERAL AVIATION PRODUCTION

units				DOLLARS (Millions)		
Year	Total	Exports	Percent	Total	Exports	Percent
1949	3,405	488	14.3%	\$ 17.1	\$ 2.2	12.4%
1950	3,386	415	12.3%	19.1	2.3	12.0%
1951	2,302	433	18.8%	16.8	3.1	18.5%
1951	3,058	354	11.6%	26.8	3.0	11.2%
1953	3,788	579	15.3%	34.4	4.6	13.4%
1954	3,071	496	16.2%	43.4	7.1	16.4%
1955	4,434	640	14.3%	68.2	7.5	11.0%
1956	6,738	965	14.3%	103.7	12.5	12.1%
1957	6,118	1,131	18.5%	99.6	17.4	17.5%
1958	6,414	865	13.5%	101.9	12.0	11.8%
1959	7,689	962	12.5%	129.8	14.6	11.2%
1960	7,588	1,481	19.5%	151.2	27.3	18.1%
1961	6,778	1,583	23.4%	124.3	29.8	24.0%
1962	6,697	1,458	21.8%	136.8	30.9	22.6%
1963	7,569	1,579	20.9%	153.4	35.1	22.9%
1964	9,336	1,775	19.0%	198.8	44.1	22.2%
1965	11,852	2,325	19.6%	318.2	61.2	19.2%
1966	15,768	3,903	18.4%	444.9	75.4	16.9%
1967	13,577	3,035	22.4%	359.6	76.5	21.3%
1968	13,698	2,803	20.5%	425.6	91.5	21.5%
1969	12,591	2,623	20.8%	638.8	107.1	16.8%
1970	7,402	2,170	29.3%	364.1	98.9	27.2%
1971	7,464	1,854	24.8%	313.1	95.6	30.5%
1972	9,774	2,254	23.1%	557.1	137.9	24.7%
1973	13,646	3,530	25.9%	828.2	230.2	27.8%
1974	14,167	4,248	30.0%	909.4	287.5	31.6%
1975	14,057	3,512	25.0%	1,032.6	308.1	30.0%
1976	15,447	3,539	22.9%	1,228.8	331.3	27.0%
1977	16,907	3,611	21.4%	1,491.0	354.5	23.8%
1978	17,808	3,613	20.3%	1,777.8	490.6	27.6%
1979	18,180	3,700	20.4%	2,100.0	500.0	23.8%

^{*}Forecast as of 1/1/79

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