

INDUSTRY REPORT

by the



**GENERAL AVIATION
MANUFACTURERS
ASSOCIATION**

before the

**NEW YORK SOCIETY OF
SECURITY ANALYSTS**

New York City
January 16, 1981

Edward W. Stimpson

President, GAMA

Edward B. Moore, Chairman, GAMA Board of Directors

President, Edo-Aire Division, Edo Corporation

Russell W. Meyer, Jr., Vice Chairman, GAMA Board of Directors

Chairman and President, Cessna Aircraft Company



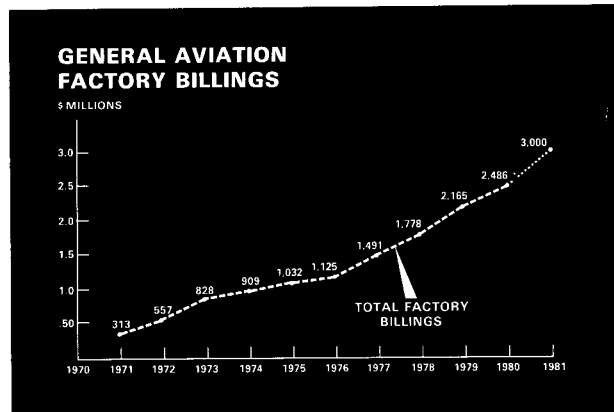
**General Aviation
Manufacturers Association**

**REMARKS OF
EDWARD W. STIMPSON, PRESIDENT
General Aviation Manufacturers Association
Before The
New York Society of Security Analysts
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January 16, 1981**

The General Aviation Manufacturers Association is again pleased to appear before the New York Society of Security Analysts. This has become our annual event for releasing our year-end results, presenting our forecasts for the new year and discussing significant factors and trends in the marketplace.

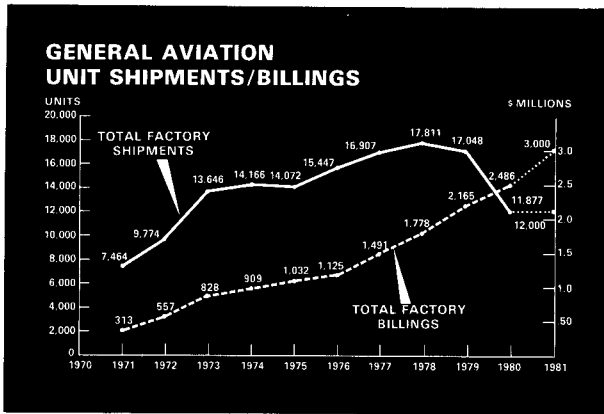
Today, our presentation will be in three parts. I will present the year-end results and forecasts. Russell Meyer, Chairman and President of Cessna Aircraft and Vice Chairman of GAMA for 1981, will discuss some of the significant factors of the marketplace. Edward Moore, President of Edo-Aire Division of Edo Corporation and GAMA Chairman for 1981, will discuss developments in aviation safety, a matter of continuing concern to all of us.

The economic factors of 1980 produced a mixed year. On the positive side, the industry posted record aircraft billings of \$2,486 billion, up 15 percent from 1979 with December's record billings totaling \$258 million, also an all-time high. Overall, this was the eighth consecutive year of record industry billings.



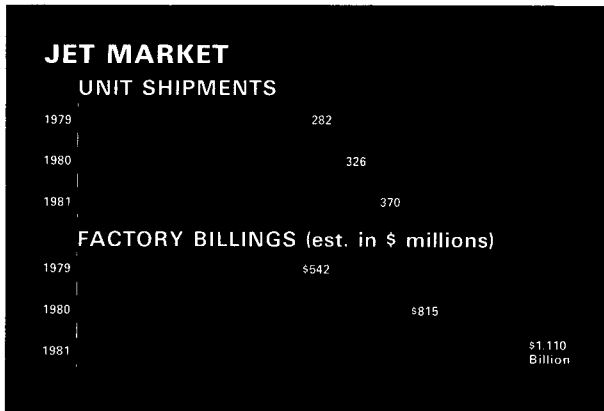
The industry also produced a record number of jet and turboprop aircraft, exceeding industry forecasts for both billings and units. But we did not meet the forecasts for the year in all categories. The shipments of multi-engine piston and single-engine aircraft were below forecasts as brutal interest rates, tight credit

restrictions, recession, inflation and rising energy costs impacted the lower end of the line. Total unit deliveries for 1980 were 11,877, significantly below our overall forecast of 15,000 units for the year.



I would now like to review the individual market segments as to the final results for 1980 and our forecasts for 1981.

Jet: In the jet market, the industry delivered 326 jets, up 16 percent from 1979 and exceeding original forecasts for 1980, as industry sales approximated \$815 million.



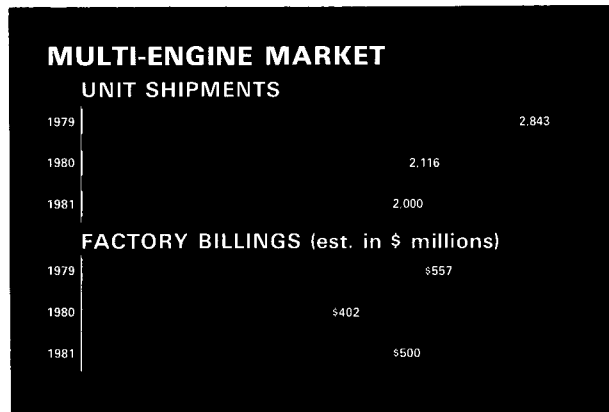
In 1981, the industry will deliver better than one business jet every calendar day, 370 in all for the year. Worth more than \$1.1 billion, this production represents an increase of 14 percent or 44 units over 1980.

Turboprop: The industry also exceeded its original 1980 forecast for turboprop deliveries, which totaled 795 units, up 25 percent from 1979. Billings approximated \$874 million.



For 1981, the turboprop market is forecast to be up significantly again. Billings will also exceed \$1 billion on the delivery of 910 aircraft, an increase of 115 aircraft from 1980.

Multi-Engine Piston: Although deliveries of heavy multi-engine aircraft to commuter airlines and businesses held up relatively well, current economic conditions impacted this market segment, particularly in the light twin area. In 1980, the industry delivered 2,116 multi-engine aircraft, down 26 percent from the 2,843 delivered in 1979.

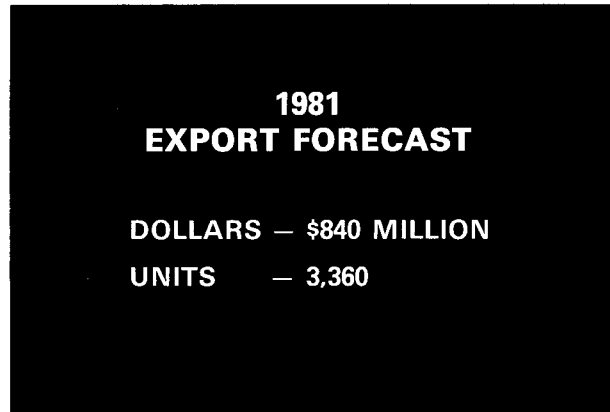


For 1981, we are forecasting delivery of about the same number of aircraft, but with a dollar volume of \$500 million. A recovery in the overall economy would assist sales in this segment of the market.

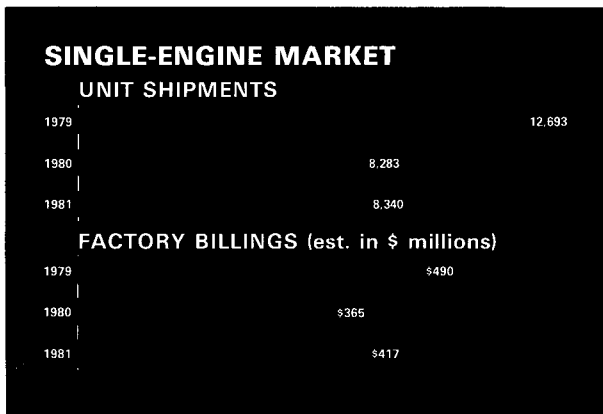
Agricultural: Because of economic conditions affecting purchases of agricultural capital goods, the ag market is still not showing great strength. The industry delivered 357 agricultural aircraft in 1980 worth \$25 million. In 1981, we anticipate little change and expect to deliver 380 aircraft with a dollar value of \$27 million.



Export Market: The export market was one of the bright spots of 1980. For the year, exports accounted for 30 percent of both dollars and units, with 3,555 aircraft being delivered with a dollar value of \$756 million. In view of the overall world economic condition, we forecast that 1981 exports will account for about 28 percent of industry shipment and dollars, or 3,360 aircraft for \$840 million.

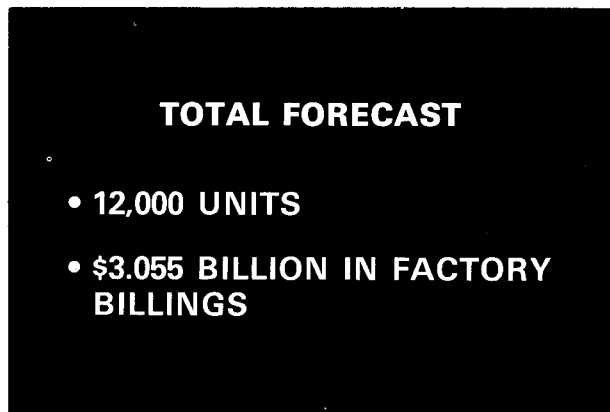


Single-Engine: The single-engine market was most greatly impacted by 1980's economic downturn. Single engine deliveries totaled 8,283, 35 percent less than 1979 and below GAMA's forecast of last year. In 1981, we are forecasting just a small increase in single-engine production to 8,340 units worth \$417 million. Improvement in the state of the economy would produce expected improvements in this sector also.



Total Forecast: For 1981, we are forecasting the industry's first \$3 billion year on the delivery of 12,000 aircraft. When you consider industry billings reached one billion in 1975, two billion in 1979, and will reach three billion in 1981, this represents a compound growth rate of 20 percent per year.

I would now like to call upon Russell Meyer to discuss some of the factors in the marketplace.



**REMARKS OF
RUSSELL W. MEYER, JR.**

Vice Chairman,

**General Aviation Manufacturers Association
Chairman and President, Cessna Aircraft Company**

As Ed indicated, we are pleased to meet with you this afternoon. We appreciate your continuing interest in General Aviation and we hope you share our enthusiasm for the future.

Compared with many other industries, General Aviation did reasonably well during a year which presented a number of major challenges. You have just heard the results for 1980, a year in which single-engine volume was impacted by a slowing economy, punishing interest rates, and restrictive credit policies.

Last year's results are now history. For all of 1980's problems and opportunities, General Aviation has emerged from the year in good shape. Now we confront the more pivotal issues—where do we go during the next several years and what are the major factors which should affect our market?

The Federal Aviation Administration is forecasting that aircraft operations during the eighties will expand one-and-a-half times as much as they did during the decade just past. And this outlook, I should add, assumes only a modest expansion in national economic activity.

We are willing to accept the FAA's activity projection as a reasonable point of reference. In our view it is neither best case nor worst case. But it does assume continued healthy growth for General Aviation business operations and we certainly agree with that assumption.

We must also take note of the fact that we are not only entering a new decade, but apparently a new—or at the very least, much different—political climate. As a candidate for President, Mr. Reagan spoke out very strongly in support of General Aviation. He indicated that he favors upgrading General Aviation airports as well as reliever airports in metropolitan areas. He said that he wants to accelerate use of the \$3.7 billion surplus which has accumulated in the Aviation Trust Fund to improve air navigation systems. He said we should consider expediting expenditures for airport development, and he promised to select people with meaningful aviation experience for the top jobs at both the FAA and the National Transportation Safety Board—people who are familiar with the problems of the system, as he put it, and who will therefore be best equipped to develop solutions.

Now, of course, the aviation community waits to see if campaign rhetoric will be followed by substantive actions. Certainly the President has said the things that General Aviation hoped he would say. It is a positive sign for the future. Another good sign is the appointment of Drew Lewis as Secretary of Transportation. Mr. Lewis' background includes considerable experience in transportation. As he indicated during his confirmation hearings, he has been a pilot for many years and he is well aware of the challenges in upgrading the air transportation system.

Our future, like our past, is closely entwined with actions by the federal government.

For example, as part of its anti-inflation program, in 1980 the federal government imposed severe restrictions on credit. As a result of these restrictions and terribly high interest rates last spring, inflation persisted and sales of smaller airplanes and many other durable commodities were severely impacted.

Except for unexpected vigor in capital investments by American business last year, our industry's results would have been substantially worse. Fortunately, corporations now invest in airplanes just as they do with other types of business machinery. In 1980, these investments—largely in the high-performance segments of our product range—allowed General Aviation to achieve respectable results at a time when federal credit policy effectively discouraged the purchases of smaller aircraft.

It is not my objective at this meeting to criticize or defend the steps which government has taken to battle inflation. I am simply describing their impact on our industry. When credit became tight and interest rates ballooned, airplane sales shrank substantially. That is a matter of record.

It is also a matter of record that the Administration and Congress in 1980 allowed the Airport Development Aid Program to lapse. In our opinion, that was inexcusable. Everyone—in government and outside—recognizes the vital need to increase capacity and reduce congestion at our nation's airports. Yet the decision-makers in Washington couldn't make up their minds about certain details of the legislation which would continue the Aviation Trust Fund and renew airport assistance. The original Airport/Airways Bill was passed in 1970. It was renewed for five more years in 1975. Allowing this bill to lapse was a serious error.

You will hear more on this vital matter from Ed Moore. But I want to stress that a new ADAP bill ranks very high on General Aviation's list of priorities, and

we will waste no time bringing this to the attention of the Administration.

We will also be asking the new Administration to take a careful look at America's foreign trade policy. Far more than most industries, General Aviation has always had a very active international business, which accounted for 30 percent of our sales in 1980. When our major trading partners impose barriers that discourage or restrain these sales, it is obviously very detrimental to our growth.

Certain major nations want to sell their airplanes freely in this country while denying us the same access to their domestic markets. Some countries have imposed penalizing duties and tariffs on American-made aircraft in an effort to make us non-competitive. So far our government has not taken appropriate action to help create an environment of free worldwide trade. This subject will also be a high priority for the industry in our relations with the new Administration.

One final point regarding government and its influence on our business: despite airline deregulation, civil aviation remains a highly regulated activity. The products used in aviation, and the people who use them, are carefully scrutinized and monitored under government authority. We must exist in a regulatory environment. Therefore, we believe this environment should be as conducive as possible to the industry's growth and prosperity. Regulators can, by their understanding and perception, help the industry grow. Or they can constrain and stifle it. General Aviation is hopeful that the Reagan Administration will generate a regulatory climate of understanding and cooperation so our industry can reach its full potential in the nation's—in fact, in the world's—air transportation system.

Today, the business of General Aviation is business. Business flying is by far the dominant area of activity and the fastest growing segment of General Aviation. Aircraft purchases for business use continue to supply strong sales momentum. Aircraft sold for business aviation have been and will continue to be our industry's fastest sellers. Today, at least 90 percent of the industry's sales are for business purposes.

This does not mean that the industry has abandoned the small airplane. Quite the contrary, the single-engine airplane continues to be the base of our business. During the past year, sales of high performance single-engine aircraft held up relatively well as the major declines were in the light single-engine and training markets. The industry is vitally concerned about the single-engine line and its future. Student

starts, one indicator of future industry growth, are down by over 20 percent from the previous year. Consequently, the industry is now evaluating a major program to strengthen the entry of new students into flight training, similar to the highly successful TakeOff program conducted during 1976-1979.

1981 GAMA SHIPMENT FORECAST		
TYPE	UNITS	\$(M)
TJ.....	370	1,110
TP.....	910	1,001
ME.....	2,000	500
AG.....	380	27
SE.....	8,340	417
TOTAL	12,000	\$3.055 Billion

The key reasons behind business aviation's growth are the dispersal of the Nation's industrial base to smaller communities; the requirement for greater flexibility of travel schedules; the continuing impact of airline deregulation, which has resulted in a steady reduction of service to both large and small communities; and the fuel and cost efficiency of business aircraft as compared with other forms of transportation.

There is another way to put it—business aviation makes good economic sense.

For example, it costs my company \$1,524 to put three people on a scheduled airliner in Wichita for the round-trip to New York—but they can make the trip in a pressurized single-engine aircraft for \$1,056, a savings of 31 percent.

Another example. IBM may need to dispatch a three-man sales team from its assembly plant in Burlington, Vermont, to call on a new customer in Iron Mountain, Michigan. On the airlines the only way to reach Iron Mountain from Burlington is by way of Chicago. The trip, including a two-hour layover at O'Hare, consumes almost six hours. You cannot leave Iron Mountain until noon the next day. On the way home, there are layovers in Green Bay and Chicago. That trip spans eight hours, and the total bill for airline fares alone comes to \$1,428.

The same IBM crew in a high performance single-engine aircraft could make the trip in four hours and 11 minutes. In other words, they could reach Iron Mountain by noon, spend half a day there, and still get home before midnight. The cost would be \$502, a savings of almost 200 percent.

These are routine examples of General Aviation benefits drawn from real world transportation requirements and today's cost of that transportation. Business aviation can save a company money and a tremendous amount of time. This is a highly compelling sales message.

In summary, the future of General Aviation looks good. Our products are very well regarded in the marketplace. There is increasing demand in business aviation. We enjoy a well-established export trade. And by and large, government policy tends to support the growth of the national air transportation system.

We do confront our share of challenges, such as airport congestion, foreign competition and economic uncertainties. We believe we can meet these challenges satisfactorily, just as we've done in the past.

Maintaining a consistent record of sales improvement will not be easy—but it is clearly achievable. It will require the industry's continued best efforts and a reasonable measure of government understanding. However, the most significant factor in evaluating future growth is customer demand. As you know, there is strong demand today for business transportation, and for all the reasons we've reviewed today, we believe it will continue to grow in the future.

**REMARKS OF
EDWARD B. MOORE
Chairman, General Aviation
Manufacturers Association
President Edo-Aire Division, Edo Corporation**

Thank you, Russ. Safety is of prime concern to our industry. It always has been. It is one of the reasons why we grow. Today I'd like to discuss some of the progress that has been made in this area and how it relates to the health of the industry.

Safety is no accident. Safety is pre-eminent in our thinking, engineering and building of aircraft every working day. Over the last several years, the General Aviation accident rate has dropped consistently. A lot of work has gone into making General Aviation one of the safest ways to travel—including industry-wide efforts in two areas, training and technology. Industry and government have cooperated to promote and teach safe flying procedures and to encourage proficiency training among students and experienced pilots alike. At the same time, technical developments in simulators, new avionics packages, and in General Aviation products overall have together contributed importantly to the entire scope of air safety.

Training: Pilots undergo comprehensive training which enables them to meet strict requirements for knowledge and technique set down by the Federal Aviation Administration.

To aid in the instruction and licensing process, our industry took the initiative in developing a standardized flight curriculum in the early seventies. The integrated flight training system was a real departure from flight training prior to that time. Because of the efforts of our manufacturers and companies involved in aviation education, more and more flight schools around the country adopted a disciplined, organized, systems approach to flight instruction. Today, over 50 percent of students are trained in this kind of program. We found that statistics on first time passes and FAA exam grades show significantly better results from students who follow the standardized curriculum.

The General Aviation pilot of today, then, is in the main a product of an improved training experience. However, for today's pilot, the need for training is continuous . . . for flying is a skill that diminishes unless you work at it. As in most endeavors, *proficiency* is the key to achievement and staying on top is a matter of training. Recurrent instruction offered by industry and

government sources help keep good pilots safety sharp.

A major source of such continuing pilot education is the FAA Accident Prevention Program begun in 1971. The program features safety seminars and clinics in thousands of locations across the country to promote and teach safe flying techniques. The industry contribution to this effort also includes national promotional support by GAMA and others.

Happily, over the ten years of the program's existence, more and more pilots have attended these refresher meetings each year. Over the same period, FAA figures show a continued downward trend in General Aviation accidents. That's great news, of course, but we're still not satisfied. Our objective—and that of our government colleagues—is to keep that trend going. And to see that it does, we're following up this year with another nationwide proficiency program entitled SAFE PILOT '81.

Just as importantly, improvements in simulator training have helped immensely to improve General Aviation's safety track record. The FAA has continued to modify its regulations to encourage more required training to be done in simulators. Use of a simulator permits training for airborne emergencies without risk. As the cost of fuel has increased, so have the advantages of simulator training. All GAMA jet manufacturers use simulators, and piston engine aircraft manufacturers are doing the same. FlightSafety International, a GAMA company, estimates that simulator training saved its customers over 26 million gallons of jet fuel in 1980, a savings of more than \$40 million in their training budgets.

Technology: New avionics packages and improvements in General Aviation products overall also have contributed to safety. The reliability of avionics has increased significantly in the past ten years due to the advent of solid state circuitry including microprocessor technology. And weather radar has also become more readily available in smaller, single-engine aircraft. A few years ago it wasn't available in anything smaller than the heavier twins.

And while dual navigation and communications equipment, full instrument landing systems and complex flight directors are commonplace on today's General Aviation aircraft, advanced new navigation systems, displaying constant readouts of the aircraft's position over the earth, are now being introduced. In fact, some systems are in operation aboard General Aviation aircraft before their introduction into airline service.

New advances in aircraft design will accelerate this gain in aircraft utility and efficiency. New airfoil technology will reduce drag and thus increase fuel efficiency and speed at the same time. And we're even seeing the first of new construction materials—various graphite, boron and fiberglass composites—that will revolutionize the industry with strong but lightweight airframes, propellers and landing gear for even better performance from a gallon of fuel.

Government Action: But there is another ingredient to increased safety and utility of General Aviation: the passage in the 97th Congress of the Airport Development Aid Program, or ADAP. The defeat of this long-standing funding for airport capacity and safety ended a successful ten year period during which the modern ADAP program delivered more than \$2.5 billion for more airport runways, taxiways and parking ramps, and more approach aids and other airport safety and security improvements.

On September 30 of last year, Congress allowed this highly successful and helpful program to lapse with more than \$3.7 billion in aviation user taxes withheld in surplus. GAMA and other aviation groups have formulated renewal legislation for the Airport/Airway program. We *fervently* hope that Congress will turn its attention to renewing this necessary program early in its first session. Renewal would bring about essential safety and capacity support programs for the benefit of all of air transportation.

But one of its most important benefits would be funding of badly needed improvements at reliever airports, those fields surrounding major hubs which help ease the pressure on the airspace and ground facilities at those hubs. General Aviation can be well served at many of these locations if they are adequately equipped. But some of them are not. Instrument landing systems and other navigational aids are needed at many relievers, even those which have scheduled commuter service and a heavy flight training role. In fact, you may be surprised to learn that two-thirds of the 361 airports served by commuters exclusively lack precision instrument approach facilities.

The issue of reliever airport development is so vital to our industry's growth that several aviation groups have banded together to start a new nationwide Reliever Airport Program. It's a joint civic effort of GAMA, the National Business Aircraft Association (NBAA) and the Air Transport Association (ATA). This landmark coalition marks the first specific cooperative effort by airlines and General Aviation in such a project.

With beginnings such as this, we are optimistic that

joint efforts by the aviation community, renewal of ADAP by Congress and advancing General Aviation technology and training can keep the world's most personal and flexible transportation system safe, efficient and economically sound.

On behalf of GAMA, let me thank you all for attending today.



U.S. GENERAL AVIATION PRODUCTION

Year	UNITS			DOLLARS (Millions)		
	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%
1952	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	14.4%	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	2,903	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%	838.2	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	17,811	3,612	20.3%	1,777.8	486.4	27.4%
1979	17,048	3,995	23.4%	2,164.9	600.9	27.7%
1980	11,877	3,555	30.0%	2,486.2	756.4	29.9%
*1981	12,000	3,360	28.0%	3,055.0	840.0	28.0%

*Forecast as of 1/1/81



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.



EDWARD B. MOORE

Edward B. Moore, chairman of the General Aviation Manufacturers Association (GAMA), is vice president and director of the Edo Corporation and president of its Edo-Aire Division.

He was born in Ho-Ho-Kus, New Jersey in 1922 and received his M.E. degree from Stevens Institute of Technology in 1944. He received further education in the Navy Electronics Officers' School at Bowdoin College and MIT.

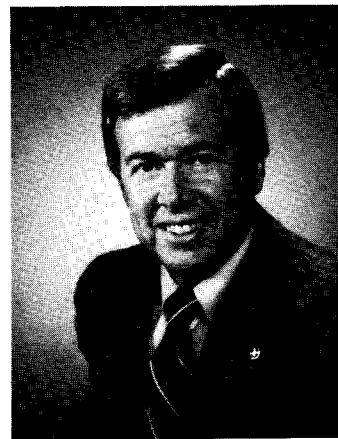
He served as Electronics Officer in 1945 and 1946 on the aircraft carrier U.S.S. Randolph.

From 1946 to 1954 he was associated with ITT Federal Division during which time he participated in the development of a variety of aircraft navigation and instrument landing equipment.

He joined Aircraft Radio Corporation (ARC) in 1954 and served as Vice President and Chief Engineer from 1960 to 1968.

Mr. Moore joined the Edo Corporation in 1968 at the time the Edo-Aire Division was formed.

He is past chairman of GAMA's Airport/Airways and Operations Committee and Safety Affairs Committee.



RUSSELL W. MEYER, JR.

Russell W. Meyer, Jr., vice chairman of the General Aviation Manufacturers Association, was elected chairman of the board and chief executive officer of Cessna Aircraft Company in June, 1975.

Prior to his election as chairman, Meyer served as executive vice-president of Cessna, a post he assumed in June, 1974.

From 1966-1974, Meyer, a native of Davenport, Iowa, was president and chief executive officer of Grumman American Aviation Corporation, Cleveland, Ohio.

From 1961-1966, he was an attorney with the firm of Arter & Hadden in Cleveland.

Meyer was graduated from Yale University with a B.A. degree in 1954, and earned his doctor of law degree at Harvard Law School in 1961.

He served with the U.S. Air Force as a pilot from 1955-1958, and was also a pilot with the U.S. Marine Corps Reserve from 1958-1961.

A commercial pilot with instrument rating, he has logged more than 5,000 flight hours.

He is a member of the Board of Directors of the General Aviation Manufacturers Association.

Meyer is married and has five children.

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- King Radio Corporation
400 North Rogers Road
Olathe, Kansas 60061
(913) 782-0400
- *McCreary Tire
& Rubber Company
1600 Washington Street
Indiana, Pennsylvania 15701
(412) 357-6600
- Mooney Aircraft Corporation
P.O. Box 72
Louis Schreiner Field
Kerrville, Texas 78028
(512) 896-6000
- NARCO Avionics
Commerce Drive
Fort Washington,
Pennsylvania 19034
(215) 643-2900
- *Oberdorfer Foundries, Inc.
P.O. Box 1125
Syracuse, New York 13201
(315) 437-0361
- *Pacific Scientific Company
1346 S. State College Blvd.
Anaheim, California 92803
(213) 927-5217
- Parker Hannifin Corporation
Parker Berteau Aerospace
Group
17325 Euclid Avenue
Cleveland, Ohio 44112
(216) 531-3000
- Piper Aircraft Company
Lock Haven, Pennsylvania
17745
(717) 748-6711
- Rockwell International
Saberliner Division
6161 Aviation Drive
St. Louis, Missouri 63134
(314) 731-2260
- Sperry Corporation
Flight Systems Division
Box 2111
Phoenix, Arizona 85036
(602) 869-2311
- Teledyne Continental Motors
Aircraft Products Division
Box 90
Mobile, Alabama 36601
(205) 438-3411
- United Technologies
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Pratt & Whitney of Canada,
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