CONNECTING THE FUTURE
Shaping the future of regional connectivity

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Vice President Marketing
A STRONG MANUFACTURER

- Established in 1981
- Equal partnership between 2 aerospace leaders
- $1.8 bn turnover in 2017
- Final assembly line in Toulouse
- 1,300 people worldwide
A UNIQUE FAMILY OF AIRCRAFT

One product, two models
Match capacity and demand

High commonality
• Single Type Rating ATR 42/72
• Same PW127M engines
• Same flight deck and propellers
• 90% of common spare parts
UNBEATABLE FUEL EFFICIENCY

Fuel burn per trip on average regional sector (230 Nm/ 426 Km)

<table>
<thead>
<tr>
<th>Model</th>
<th>Ref.</th>
<th>ATR 42-600</th>
<th>ATR 72-600</th>
<th>TP Competitor</th>
<th>70-Seat Jets</th>
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<tr>
<td>ATR 42-600</td>
<td></td>
<td>-10%</td>
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<td>ATR 72-600</td>
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<td>+40%</td>
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<tr>
<td>TP Competitor</td>
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<td>+85%</td>
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<td>70-Seat Jets</td>
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WORLD WIDE SUCCESS

200 operators
100 countries
Operator base as large as single aisle…

…and much higher than other regional A/C
REGIONAL MARKET IS ESSENTIAL
THE NEED FOR TURBOPROPS

Turboprops assure essential connectivity... ...and boost local economy
Regional Aircraft Firm Orders (2010-2017)

- Q400: 37%
- CRJ700/900
- MRJ
- E170/175

Turboprop Aircraft Firm Orders (2010-2017)

- Q400: 75%
- Jets: 37%
- Turboprops
ATR is the leader in this decade…

…while jets are important only in the USA
THE WORLD IS SHIFTING EAST AND SOUTH

New markets are yet to emerge … … and reinforce turboprops as the benchmark
30% of future traffic will be flown on routes which do not exist today

2,770 new routes to be created
TURBOPROP DEMAND FORECAST – BY REGION

- China: 300 deliveries
- Asia Pacific: 740 deliveries
- Africa-Middle East: 350 deliveries
- South Asia: 260 deliveries
- Central Europe & CIS: 250 deliveries
- Latin America & Caribbean: 420 deliveries
- North America: 350 deliveries
- Western Europe: 350 deliveries

**Airbus ATR Models**

- TP50
- TP70

**Seating Capacities**

- **TP50**: 40-60 seats
- **TP70**: 61-80 seats
Global e-commerce sales forecasted to grow by 19% per year over the next five years.
Turboprop freighter demand forecast

460
Freighters deliveries
How will ATR address this future market?
CONTINUOUS IMPROVEMENT

**ATR 42-300/320**
PW120 / PW121
1985
- 6 Blade Propeller
- Engine, Acoustic Treatment, Cabin

**ATR 42-500**
PW127E/M
1995
- Glass Cockpit, New Avionics Suite
- Engine, Cabin

**ATR 42-600**
PW127M
2012
- ATR 600

**ATR 72-200/210**
PW124B / PW127
1989

**ATR 72-500**
PW127F/M
1997

**ATR 72-600**
PW127M
2011

From 1st generation to Series -600
PRODUCT DEVELOPMENT AND INNOVATION
Create Customer value

Maintenance cost reduction

New Passenger Seat
Certified in June 2018

Clearvision™
Certification in H2 2019

ATR 42-600S (STOL)
EIS target mid-2021

Cabinstream®
EIS in 2018
DOUBLE DIGIT ADVANTAGE

ADVANTAGE OVER COMPETITOR:

TRIP FUEL & MAINTENANCE
40%

TRIP COST
20%

SEAT COST
10%
The ideal route opener

Cover short runway airports with ATR 42S

Serve thicker markets while benefiting from the lowest seat cost

The right aircraft family for **sustaining and growing** regional routes in Europe

High commonality
Thank you

http://www.atraircraft.com/turboprop-market-forecast.html
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