17th Annual
Turbine-powered, civilian helicopter purchase outlook

This analysis is based on Honeywell customer expectation surveys, an assessment of consensus forecasts, a review of factory delivery rates and analysis of future new helicopter introductions.

Global deliveries
Projected 10% to 22% improvement during 2015–2019 period.

<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>4,300</td>
<td>4,750–5,250</td>
</tr>
</tbody>
</table>

Global purchase plans rose 3 points - U.S. leads improvement

# Purchase plans by region
5-Year Survey respondent fleet replacement and expansion plan percentages

- North America: 18%
- Latin America: 28%
- Middle East & Africa: 25%
- Asia Pacific: 20%
- Europe: 32%

Middle East and Africa replacement and addition rates highest in the world.

# Purchase plans by size
Light Single-Engine and Twin-Engine models account for 67% of expected purchases.

- Light Single-Engine: 49%
- Light Twin-Engine: 18%
- Intermediate & Medium Twin-Engine: 31%
- Heavy Multi-Engine: 2%

Planned usage of new helicopters
Utility and Law Enforcement trend up.

- General Utility/Other/Incl. Tourism: 30%
- Emergency Medical Services/SAR: 18%
- Oil & Gas: 8%
- Corporate: 25%
- Law Enforcement: 18%
- News & Television: 1%

Dual-use or multi-purpose aircraft allocated to primary usage category.