

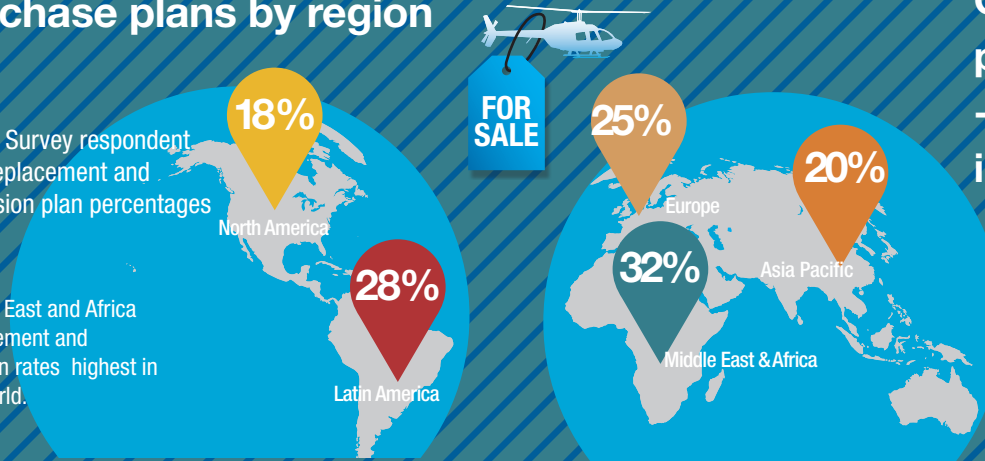
# Turbine-powered, civilian helicopter purchase outlook

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.

## Purchase plans by region

5-Year Survey respondent fleet replacement and expansion plan percentages

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



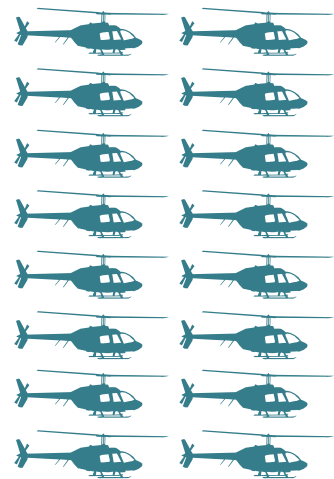
Global purchase plans rose 3 points - U.S. leads improvement

2015

## Global deliveries

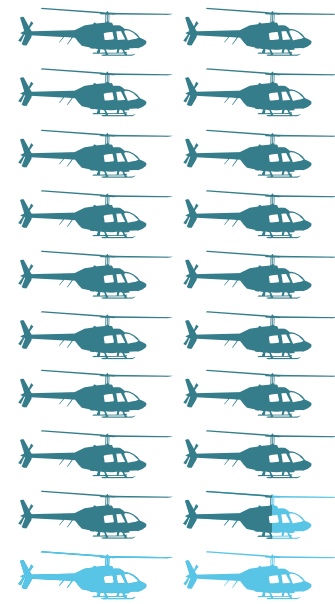
Projected 10% to 22% improvement during 2015–2019 period.

2010–2014



4,300

2015–2019

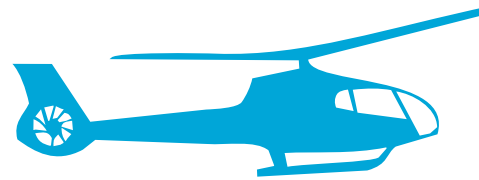


4,750–5,250

= 275 Helicopter deliveries

## Purchase plans by size

Light Single-Engine and Twin-Engine models account for 67% of expected purchases.



49% Light Single-Engine



18% Light Twin-Engine



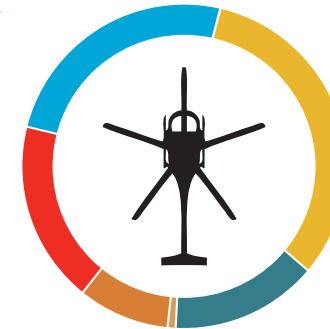
31% Intermediate & Medium Twin-Engine



2% Heavy Multi-Engine

## Planned usage of new helicopters

Utility and Law Enforcement trend up.



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

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