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Foley Forecast

Business Jet Fuel Demand Outlook

(Sample Format)

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Background/Challenges

Study Background

- For a variety of reasons, it has always been difficult to estimate yearly worldwide consumption of Jet-A by business jets
- Therefore, estimate fuel usage by worldwide region and cabin class
- Develop a 10 year forecast by region and class
- Provide a general snapshot of the operator self-fueling trends

Barriers to Previous Attempts

- Lack of cooperation in the industry due to proprietary data concerns
- Difficulty in accounting for ongoing aircraft retirements and improving fuel efficiencies of new deliveries
- Challenge in forecasting future deliveries of aircraft by region



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The First Findings Estimate Current Worldwide Bizjet Fuel Volumes by Region and Cabin size

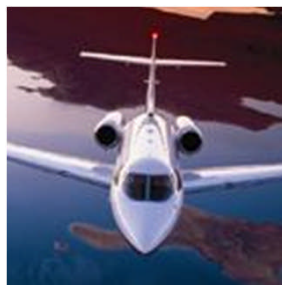
Objectives

- Estimate today's yearly fuel volume by worldwide region and business jet cabin class



Key Questions

- What is current population of business jets by model in each world region (Asia, North America, Europe, Africa, Central America, Oceania South America and Middle East)?
- What is average hourly fuel burn of each model?
- What is the typical yearly utilization by model?
- Knowing model populations, utilization and associated fuel burns, what are the total yearly fuel volumes in each region by cabin class?



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The Next Findings Forecast Future Jet Deliveries and Retirements In Each Region

Objectives

- Estimate future business jet population and makeup by worldwide region
- Account for both new deliveries and retirements



Key Questions

- Over the next 10 years how many business jets by model will be delivered?
- What region of the world will each unit be delivered to?
- What will be the likely fuel burns of these future models?
- Which business jets will be retired over the next 10 years and from which regions?



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Based on The Previous Objectives Future Worldwide Fuel Demand Is Estimated

Objectives

- Estimate total yearly business jet fuel burn by worldwide region and cabin class 2010-2019
- Determine growth (CAGR) of fuel volume growth to understand future areas of opportunity



Key Questions

- What is estimated worldwide yearly business jet fuel burn for the next 10 years?
- Are growth rates expected to vary in each region?
- What is the Compound Annual Growth Rates (CAGRs) of these regions?
- How does the small aircraft market size and growth compare to the medium, large and bizliner aircraft segments?



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The Side-Topic of Self-Fueling Trends in North America Is Investigated

Objectives

- Describe recent activities involving fuel farms and other self-fueling schemes in N. America
- Attempt to quantify the scale of the self-fueling segment
- Provide a point-of-view on future trends and scale in this area



Key Questions

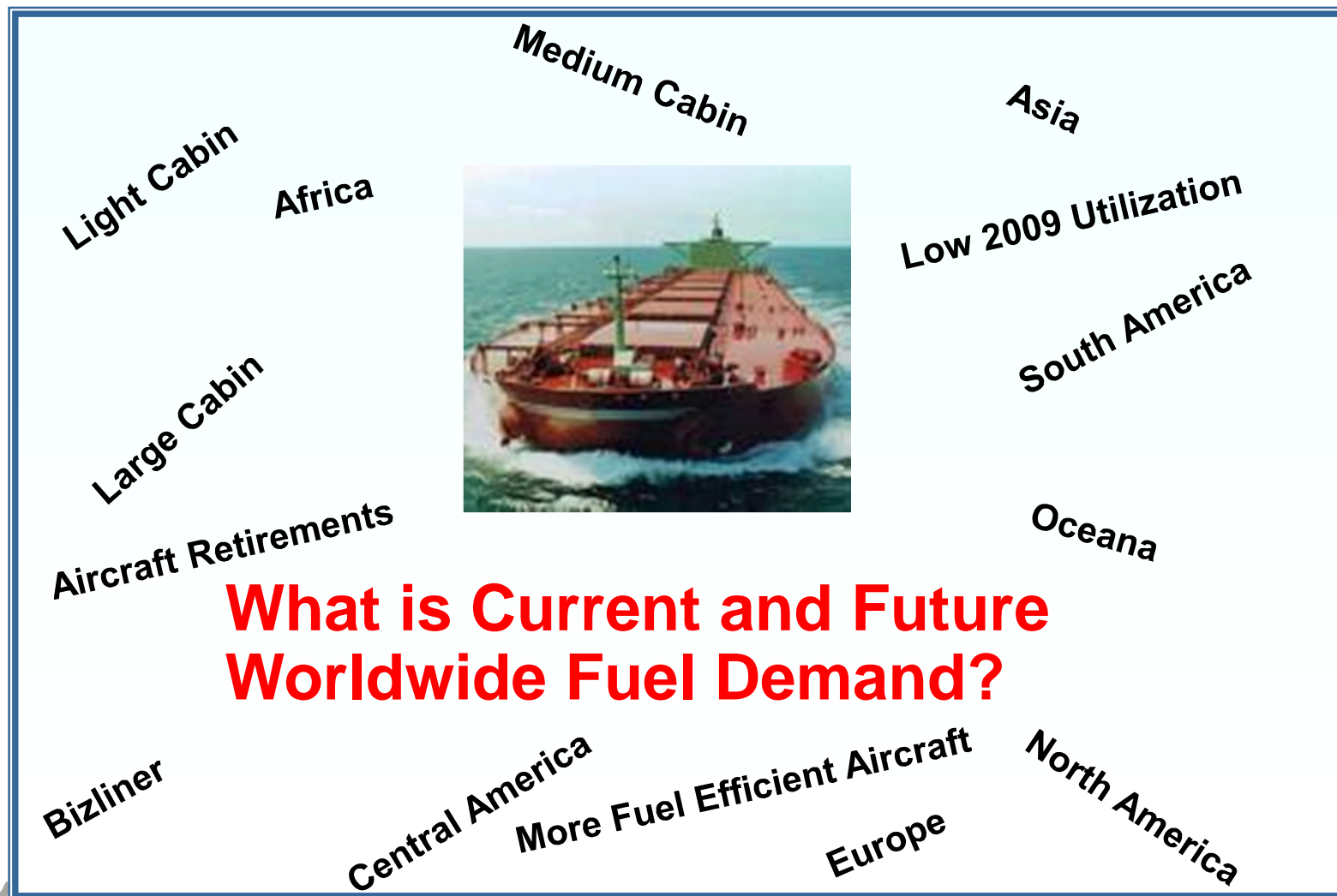
- What have been the recent trends in self-fueling in North America?
- Is this a knee-jerk reaction to recent high fuel costs and the economy or a long-term trend?
- What is the approximate scale of self-fueling in North America?
- What will be the likely trend of this segment in the future?
- How will the scale of self-fueling change in the future?



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Estimates For Current and Future Worldwide Demand For Business Jet Fuel Are Derived



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Foley 10-Year Business Jet Fuel Demand Forecast

Key Findings

- **2009 business jet fuel usage estimate by cabin class, model and continent**
- **Relative fuel burns by cabin class and region**
- **Worldwide business jet distribution and 10-year delivery forecast by model**
- **Business jet delivery and retirement forecast by cabin class and region**
- **10-year business jet fuel usage forecast by cabin class and continent**
- **Worldwide business jet fuel usage CAGR by year, cabin class, region**
- **Bonus: Analysis of self-fuelling fuel farm trends**



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