

A blurred photograph of an airplane cockpit, showing the instrument panel, control yokes, and overhead panels. The image is dark and serves as a background for the title text.

Commercial Air Transport Avionics Market Analysis and Outlook December 2007



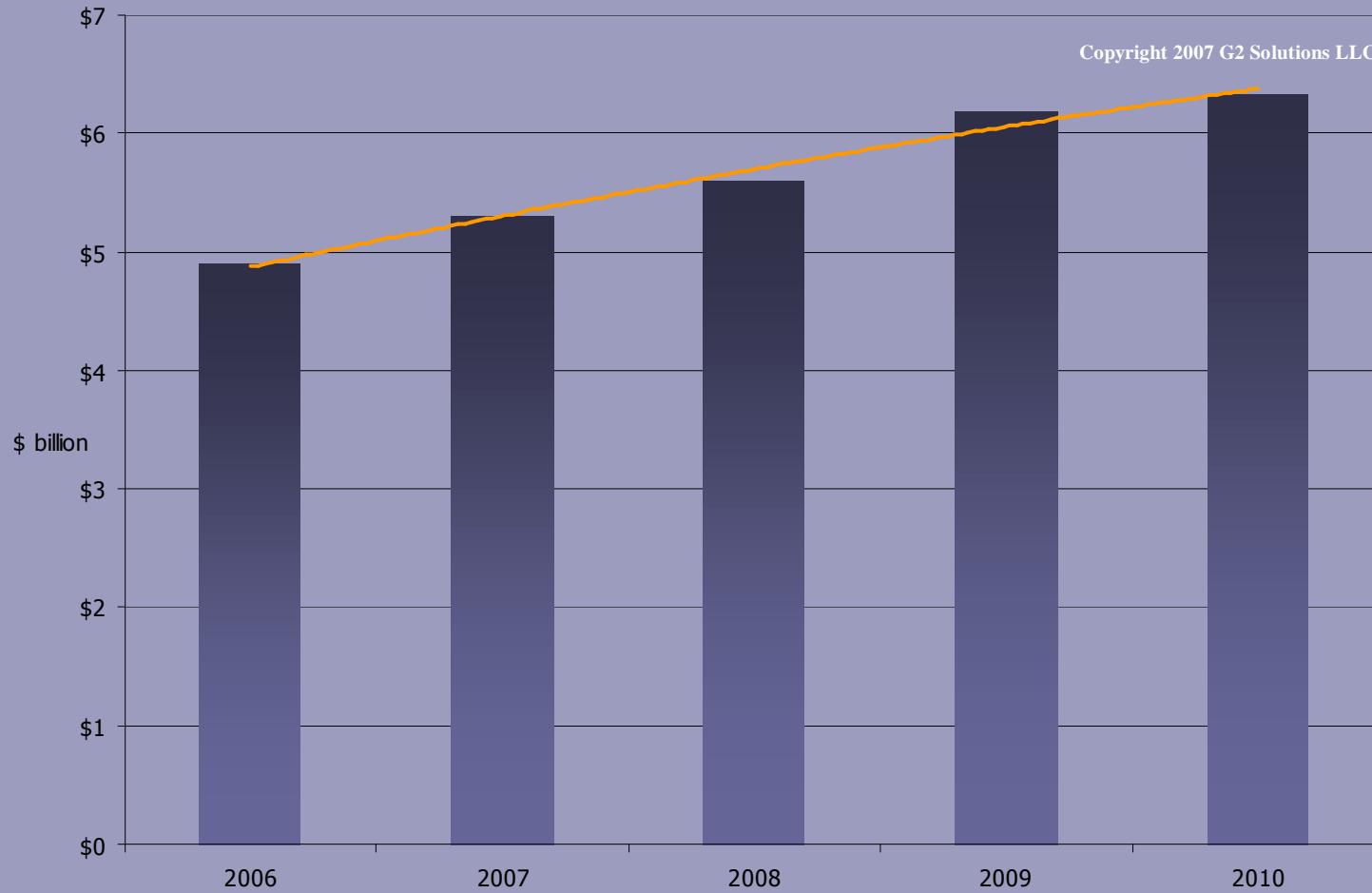
Executive Briefing

Outlook

- Demand throughout the forecast period will be robust with a temporary decline towards the later part
- There will be strong avionics upgrade opportunities in established markets such as the US and Europe until new narrowbody aircraft are introduced sometime next decade
- Near Term Outlook: average growth rate 2007-2010: 5.6%, Compound Annual Growth Rate 2006-2010: 4.6%
- Top three avionics OEM competitors control approximately 85% of the forward fit market, an increase over previous years
- Consolidation likely will continue with Tier 1 & 2 companies looking to augment their market role in the retrofit segment and make other acquisitions based on program or avionics technology-based opportunities. For example, General Electric's 2007 acquisition of Smith Industries has augmented GE's avionics footprint and aircraft shipset value significantly.
- Market vulnerable to a downturn in aircraft orders, however replacement cycles and need for more efficient aircraft will moderate such an impact.

Sample: Commercial Air Transport Avionics Market 2006-2010

Total Commercial Avionics Forward Fit Market (2006-2010)



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