Commercial update – Global Investor Forum

John Leahy, COO Customers, Airbus
London, 12th December 2013
Safe Harbour Statement

Disclaimer

This presentation includes forward-looking statements. Words such as “anticipates”, “believes”, “estimates”, “expects”, “intends”, “plans”, “projects”, “may” and similar expressions are used to identify these forward-looking statements. Examples of forward-looking statements include statements made about strategy, ramp-up and delivery schedules, introduction of new products and services and market expectations, as well as statements regarding future performance and outlook. By their nature, forward-looking statements involve risk and uncertainty because they relate to future events and circumstances and there are many factors that could cause actual results and developments to differ materially from those expressed or implied by these forward-looking statements.

These factors include but are not limited to:

- Changes in general economic, political or market conditions, including the cyclical nature of some of EADS’ businesses;
- Significant disruptions in air travel (including as a result of terrorist attacks);
- Currency exchange rate fluctuations, in particular between the Euro and the U.S. dollar;
- The successful execution of internal performance plans, including cost reduction and productivity efforts;
- Product performance risks, as well as programme development and management risks;
- Customer, supplier and subcontractor performance or contract negotiations, including financing issues;
- Competition and consolidation in the aerospace and defence industry;
- Significant collective bargaining labour disputes;
- The outcome of political and legal processes, including the availability of government financing for certain programmes and the size of defence and space procurement budgets;
- Research and development costs in connection with new products;
- Legal, financial and governmental risks related to international transactions;
- Legal and investigatory proceedings and other economic, political and technological risks and uncertainties.

As a result, EADS’ actual results may differ materially from the plans, goals and expectations set forth in such forward-looking statements. For a discussion of factors that could cause future results to differ from such forward-looking statements, see EADS “Registration Document” dated 3 April 2013. Any forward-looking statement contained in this presentation speaks as of the date of this presentation. EADS undertakes no obligation to publicly revise or update any forward-looking statements in light of new information, future events or otherwise.
2013 Airbus and Boeing world market share

Net order share since 1995

Boeing

Airbus

Data to end November 2013

Airbus
56%
1,314 aircraft

Boeing
44%
1,037 aircraft
2013 gross market share

Units

Airbus
1373
53%

Boeing
1212
47%

Revenues

Airbus
$196.0
53%

Boeing
$173.1
47%

2585 industry orders

$369.1bn industry
2013 market share by category - gross

**Single aisle**
- 2,030 orders
- A320: 1,089 (54%)
- 737: 941 (46%)

**Widebody**
- 545 orders
- A330/A350: 284 (52%)
- 767/777/787: 261 (48%)

**VLA**
- 10 orders
- A380: 10 (100%)

ACJ: 3 (50%)
BBJ: 3 (50%)
A350: 236 (59%)
787: 165 (41%)
Data to end November 2013
2013 net market share

**Units**

- **Airbus**: 1314 units, 56%
- **Boeing**: 1037 units, 44%

**Revenues**

- **Airbus**: $188.1bn, 55%
- **Boeing**: $155.0bn, 45%

2351 industry orders

$343.1bn industry
2013 market share by category - net

Single aisle
1825 orders

- A320: 1045 (57%)
- 737: 780 (43%)

Widebody
524 orders

- A330/A350: 272 (52%)
- 767/777/787: 252 (48%)

VLA
2 orders

- A380: -3
- 747-8: 5 (100%)

ACJ: 0
BBJ: 3 (100%)
A350: 232 (59%)
787: 164 (41%)

Data to end November 2013
Delivery comparison over the last 10 years

Annual deliveries

Most deliveries from 2003 to 2011

Data to end November 2013
## Backlogs

<table>
<thead>
<tr>
<th>Airbus</th>
<th></th>
<th>Boeing</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>A320ceo</td>
<td>1,706</td>
<td>737NG</td>
<td>1,817</td>
</tr>
<tr>
<td>A320neo</td>
<td>2,523</td>
<td>737 MAX</td>
<td>1,639</td>
</tr>
<tr>
<td>A330</td>
<td>251</td>
<td>767</td>
<td>48</td>
</tr>
<tr>
<td>A350</td>
<td>814</td>
<td>787</td>
<td>909</td>
</tr>
<tr>
<td>A380</td>
<td>140</td>
<td>777</td>
<td>363</td>
</tr>
<tr>
<td>Total</td>
<td>5,434</td>
<td>Total</td>
<td>4,830</td>
</tr>
</tbody>
</table>

To end November 2013
2013 Airbus order backlog by region

Airbus backlog and GMF

North America: 13% (20%)
Europe & CIS: 19% (24%)
Middle East: 8% (7%)
Asia Pacific: 33% (38%)
Latin America: 7% (8%)
Africa: 1% (3%)
Lessors: 18%
### Global Market Forecast 2013: Highlights

GMF 2013 key numbers and 20-year change

<table>
<thead>
<tr>
<th>World Fleet Forecast</th>
<th>2012</th>
<th>2032</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>RPK (trillions)</td>
<td>5.5</td>
<td>13.9</td>
<td>151%</td>
</tr>
<tr>
<td>Passenger aircraft fleet</td>
<td>16,094</td>
<td>33,651</td>
<td>109%</td>
</tr>
<tr>
<td>New passenger aircraft deliveries</td>
<td>28,355</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dedicated freighters</td>
<td>1,645</td>
<td>2,905</td>
<td>77%</td>
</tr>
<tr>
<td>New freighter aircraft deliveries</td>
<td>871</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**20 year forecast: 29,226 new aircraft, market value $4.4 trillion**

Source: Airbus 2013 GMF, Passenger aircraft (≥ 100 seats), Jet freight aircraft (>10 tons)
20-year demand for 29,226 new passenger and freight aircraft

- **20,242** single-aisles (+724)
- **7,273** twin-aisles (+299)
- **1,711** very large aircraft (+5)
- **29,226** new aircraft (+1,028)

Market value of $4.4 trillion

Source: Airbus 2013 GMF, Passenger aircraft (≥ 100 seats), Jet freight aircraft (>10 tons)
Traffic will double in the next 15 years

Air traffic has doubled every 15 years

Air traffic will double in the next 15 years
Global Investor Forum 2013

Global Middle Class to more than double

Global Middle Class* (Millions of people)

<table>
<thead>
<tr>
<th>Year</th>
<th>Asia-Pacific &amp; other</th>
<th>Europe &amp; CIS</th>
<th>North America</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>1,288</td>
<td>675</td>
<td>265</td>
<td>2,228</td>
</tr>
<tr>
<td>2022</td>
<td>2,616</td>
<td>698</td>
<td>262</td>
<td>3,576</td>
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<tr>
<td>2032</td>
<td>4,283</td>
<td>675</td>
<td>253</td>
<td>5,211</td>
</tr>
</tbody>
</table>

Source: Kharas and Gertz (OECD), Airbus: * Households with daily expenditures between $10 and $100 per person (at PPP)
Asia-Pacific to lead in world traffic by 2032

RPK traffic by airline domicile (billions)

<table>
<thead>
<tr>
<th>Region</th>
<th>2012 traffic</th>
<th>2012-2032 traffic</th>
<th>% of 2012 world RPK</th>
<th>20-year growth</th>
<th>% of 2032 world RPK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asia-Pacific</td>
<td></td>
<td></td>
<td>29%</td>
<td>5.5%</td>
<td>34%</td>
</tr>
<tr>
<td>Europe</td>
<td></td>
<td></td>
<td>26%</td>
<td>3.8%</td>
<td>22%</td>
</tr>
<tr>
<td>North America</td>
<td></td>
<td></td>
<td>25%</td>
<td>3.0%</td>
<td>18%</td>
</tr>
<tr>
<td>Middle East</td>
<td></td>
<td></td>
<td>8%</td>
<td>7.1%</td>
<td>12%</td>
</tr>
<tr>
<td>Latin America</td>
<td></td>
<td></td>
<td>5%</td>
<td>6.0%</td>
<td>7%</td>
</tr>
<tr>
<td>CIS</td>
<td></td>
<td></td>
<td>4%</td>
<td>5.8%</td>
<td>4%</td>
</tr>
<tr>
<td>Africa</td>
<td></td>
<td></td>
<td>3%</td>
<td>5.1%</td>
<td>3%</td>
</tr>
</tbody>
</table>

20-year world annual traffic growth: 4.7%
Domestic PRC will be the largest flow in 2032

2012 – 2032 Billions RPK

- Domestic PRC
- Domestic USA
- Intra Western Europe
- Western Europe - USA
- Asia - Western Europe
- Domestic India
- Asia - PRC
- Domestic Brazil
- Intra Asia
- Western Europe - Middle East
- Western Europe - South America
- Domestic Asia
- Asia - Middle East
- Western Europe - PRC
- Indian Sub - Middle East
- Asia - USA
- PRC - USA
- Central Europe - Western Europe
- South America - USA
- Indian Sub - USA

20-year CAGR

<table>
<thead>
<tr>
<th>Region Pair</th>
<th>2012 CAGR</th>
<th>2032 CAGR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic PRC</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>Domestic USA</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>Intra Western Europe</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>Western Europe - USA</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>Asia - Western Europe</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>Domestic India</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>Asia - PRC</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>Domestic Brazil</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>Intra Asia</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>Western Europe - Middle East</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>Western Europe - South America</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>Domestic Asia</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>Asia - Middle East</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>Western Europe - PRC</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>Indian Sub - Middle East</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>Asia - USA</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>PRC - USA</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>Central Europe - Western Europe</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>South America - USA</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>Indian Sub - USA</td>
<td>12%</td>
<td>10%</td>
</tr>
</tbody>
</table>
More new fliers from the emerging markets

Trips* per capita over GDP per capital –2012

Source: Sabre (annualized September 2012 data), IHS Global Insight, Airbus
* Passengers originating from respective country

2/3 People in emerging countries will take a trip a year in 2032
Over 10,000 A320 Family sales

10,076 firm orders
5,847 deliveries
4,229 firm order backlog

1,706 ceo
2,523 neo

A take-off or landing every 2 seconds, with 99.6% reliability
A320neo: Featuring new engines and Sharklets

15% lower fuel burn, more range
High commonality with A320ceo
The most comfortable single aisle
A320neo additional benefits

Annual fuel savings of 15% equate to: 1.4 m litres, the consumption of 1000 mid size cars

3,600 tonnes of CO2, the CO2 absorption of 240,000 trees

NOx emissions 50% below CAEP/6

500nm more range or 2 tonnes more payload

Aircraft noise up to 15dB below Stage IV

Significant environmental improvements
NEO leads the MAX in orders and customers

- A320neo: 2,523 orders (61%)
- 737 MAX: 1,639 orders (39%)

45 customers

21 identified customers plus unidentified customers

NEO is the preferred market option

Data to end November 2013
A320neo: Worldwide sales success

2,523 Firm orders from 45 customers
A320neo is a better optimised aircraft

737NG
CFM56-7B

737 MAX
Leap-1B
Fan diameter 69"

A320ceo
CFM56-5B

A320neo
Leap-1A26 / PW1127G-JM
Fan diameter 78”~81"

With apples-to-apples specifications the A320 and 737-800W have the same OWE

A320neo will be 1.4 tonnes lighter than the 737 MAX
Airbus widebody Family: matching market demands
Twin-aisles: 43% of value
Value of 20-year new deliveries of passenger and freighter aircraft (Millions)

Passenger aircraft (≥ 100 seats) and jet freight aircraft (>10 tons)
Source: Airbus GMF 2013
Airbus leads Boeing in widebody sales

Net passenger widebody orders since 2008
Including orders from Dubai Airshow

1004 Airbus orders

695 Boeing orders

Net orders from Jan 2008 to end November 2013.
Airbus leads Boeing in widebody sales

Net passenger widebody orders since 2008
Including orders and commitments from Dubai Airshow

1060 Airbus orders

909 Boeing orders

Net orders from Jan 2008 to end November 2013
Airbus leads Boeing in widebody sales

Net passenger and freighter widebody orders since 2008
Including orders and commitments from Dubai Airshow

1034 Airbus orders

990 Boeing orders
Global Investor Forum 2013

Dubai Air Show orders and commitments

152 firm aircraft with a total value of $42 billion

<table>
<thead>
<tr>
<th>Company</th>
<th>Aircraft Code</th>
<th>Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emirates</td>
<td>A380</td>
<td>50</td>
</tr>
<tr>
<td>Etihad</td>
<td>A350-900/1000</td>
<td>50</td>
</tr>
<tr>
<td></td>
<td>A321/A320neo</td>
<td>36</td>
</tr>
<tr>
<td></td>
<td>A330-200F</td>
<td>1</td>
</tr>
<tr>
<td>Qatar</td>
<td>A330-200F</td>
<td>5</td>
</tr>
<tr>
<td>Libyan Wings</td>
<td>A350-900</td>
<td>3</td>
</tr>
<tr>
<td>Air Algerie</td>
<td>A320neo</td>
<td>4</td>
</tr>
<tr>
<td></td>
<td>A330-200</td>
<td>3</td>
</tr>
</tbody>
</table>
A330 Family passes 1,000 deliveries

A take-off or landing every 22 seconds
99.0% reliability

1,284 firm orders
1,033 deliveries
251 backlog

To end November, 2013
242t A330-200 matches mature 787-8 range

Pax weight = 95kg, JAR 3% flight profile, LRC, 200nm diversion
787-8 227.9t MTOW, A330-200 242t MTOW
12 hours in a 16.9-inch wide, 9-abreast 787-8 seat

6,000 ft cabin altitude

Mood lighting

State-of-the art IFE

18-inch aisle
You’d never accept this…
So why would you accept this?
12 hours in an 18-inch wide, 8-abreast A330 seat

- Mood lighting
- 6,000 ft cabin altitude for over 9 hours
- State-of-the-art IFE
- 19-inch aisle
**A330-200: the lowest cost per seat**

2,000 nm sector
Cash operating cost per seat

<table>
<thead>
<tr>
<th></th>
<th>COC per seat</th>
<th>Datum</th>
<th>8-abreast</th>
<th>9-abreast</th>
</tr>
</thead>
<tbody>
<tr>
<td>A330-200</td>
<td>242t</td>
<td>246t</td>
<td>36 J, 210 Y</td>
<td>9-abreast</td>
</tr>
<tr>
<td>787-8</td>
<td>228t</td>
<td>246t</td>
<td>36 J, 210 Y</td>
<td>9-abreast</td>
</tr>
</tbody>
</table>

Direct operating cost per seat

<table>
<thead>
<tr>
<th></th>
<th>DOC per seat</th>
<th>Datum</th>
<th>8-abreast</th>
<th>9-abreast</th>
</tr>
</thead>
<tbody>
<tr>
<td>A330-200</td>
<td>242t</td>
<td>246t</td>
<td>36 J, 210 Y</td>
<td>9-abreast</td>
</tr>
<tr>
<td>787-8</td>
<td>228t</td>
<td>246t</td>
<td>36 J, 210 Y</td>
<td>9-abreast</td>
</tr>
</tbody>
</table>

~4% DOC advantage against 787-8

A330 Regional: the lowest cost per seat

- Lower operational weight (MTOW 199t – other weights offered)
- Optimized thrust engine (68k)
- Up-to-date cabin tailored for shorter ranges

The lowest cost per seat regional aircraft
A330 serving Asia’s domestic and regional markets

2,700nm with 400 pax
A330-300 @199t MTOW

6,100nm with 300 pax
A330-300 @242t MTOW

A330 versatility from long-haul to short-haul

Assumptions: JAR 3%, 200nm diversion, 85% annual reliability winds, 3% track allowance
A330-300 Regional: the lowest cost per seat

2,000 nm sector
Cash operating cost per seat

Datum

<table>
<thead>
<tr>
<th></th>
<th>COC per seat</th>
<th>DOC per seat</th>
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<tbody>
<tr>
<td><strong>787-9</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>197t</td>
<td>380 seats</td>
<td></td>
</tr>
<tr>
<td>24 J, 356 Y</td>
<td>9-abreast</td>
<td></td>
</tr>
<tr>
<td>(Short range configuration)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>A330-300</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>199t</td>
<td>400 seats</td>
<td></td>
</tr>
<tr>
<td>24 J, 376 Y</td>
<td>9-abreast</td>
<td></td>
</tr>
</tbody>
</table>

Direct operating cost per seat

Datum

<table>
<thead>
<tr>
<th></th>
<th>DOC per seat</th>
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</thead>
<tbody>
<tr>
<td><strong>A330-300</strong></td>
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<td>199t</td>
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</tr>
<tr>
<td>24 J, 376 Y</td>
<td>9-abreast</td>
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<tr>
<td>(Short range configuration)</td>
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<tr>
<td><strong>787-9</strong></td>
<td></td>
</tr>
<tr>
<td>197t</td>
<td>380 seats</td>
</tr>
<tr>
<td>24 J, 356 Y</td>
<td>9-abreast</td>
</tr>
</tbody>
</table>

 Lease rates
787-9 – $1.25m
A330-300 – $900k

A350 XWB

814 Firm orders
39 Customers
814 Backlog

A350-900 Entry Into Service second half 2014

To end November 2013
A350 XWB for Japan Airlines

31 firm orders and 25 options

18 A350-900 and 13 A350-1000
Replaces 777 fleet. Value: $9.5 billion
A350 XWB: A step ahead of the 787, a generation beyond the 777
A350-900 capability offers more revenue potential
16t more cargo, twice a week and earn >$5 million per year
A350-900 capability versus 787-10

A350-900 flies short, dense missions with long haul flexibility

Typical 2-class configurations with 48 J-class at 60-inch pitch
Typical airline flight profile and reserves, * Airbus estimate
Unrivalled A350-1000 efficiency – 25% lower fuel burn

The A350-1000 provides a step change in efficiency

6,500 nm mission, 350 passengers

777-300ER requires +40t higher MTOW
20 tonnes fuel + 20 tonnes structure
777-9X is heavier than 777-300ER

777-9X
190t

777-300ER
175t

A350-1000
155t

777-9X OWE is up to 35t heavier than A350-1000

5th derivative

-20 t

+15 t*

Clean sheet design

(*) Airbus estimate
(**) Folding Wing Tips
What Boeing and GE say about the 777X economics

The 777-9X, will have a 21% lower block fuel burn per seat than the 777-300ER and a 16% lower cash operating cost per seat.


Repeated recently in Flightglobal’s 777X supplement, Nov 2013 and press reports

www.ge.com
A350 XWB and 777X competitive position

A350-900 unmatched fuel efficiency today
A350-1000 will be one step further

Relative fuel burn per seat

A350-800
A350-900
A350-1000

Relative fuel burn per trip

-20% -15% -10% -5% 0% 5% 10% 15% 20%

A350-900

A350-1000

777-8X*
777-9X*

777-300ER

Lufthansa

Comparable efficiencies
2.9l/pax/100km

Typical airline rules: A350-900 at 315 seats, A350-1000 at 369 seats, 777-9X at 405 seats (10 abreast), 777-8X at 342 seats (10 abreast), 777-300ER at 365 seats (9 abreast), (*) Airbus estimate
259 firm orders
20 customers
140 backlog

119 deliveries
140,000 revenue flights
Over 1 million flight hours
Over 50 million passengers
A take-off or landing every 5 minutes

To end November 2013
2012: 42 mega-cities

Handling more than 10,000 long haul passengers per day ...

Source: GMF 2013; Cities with more than 10,000 daily passengers
Long haul traffic: flight distance >2,000nm, excl. domestic traffic;

Long-haul traffic is concentrated on a few main aviation centres
2032: 89 mega-cities

Handling more than 10,000 long haul passengers per day …

Long-haul traffic is concentrated on a few main aviation centres

- 89
  Aviation Mega-cites
- 99%
  Of long-haul traffic on routes to/from/via 42 cities
- 2.2M
  Daily passengers: long-haul traffic to/from/via Mega cities

Source: GMF 2013; Cities with more than 10,000 daily passengers
Long haul traffic: flight distance >2,000nm, excl. domestic traffic;
A380 vs. 747-8 market share

Net orders passenger and VIP aircraft

A380 259 orders 85%

747-8 45 orders 15%

Data to end November 2013. Source: Airbus Orders & Deliveries, Boeing.com
Includes 9 747 VIP and 1 A380 VIP
A380 vs. 747-8 market share

Net orders passenger aircraft

A380
258 orders
88%

747-8
36 orders
12%

Data to end November 2013, Source: Airbus Orders & Deliveries, Boeing.com
The best cabin in the sky

A380, light, bright, roomier with wider economy seats
You’d never accept this...
So why would you accept this?
The origin of the 17” seat – over 50 years ago

Coach

Coach Lounge

United DC-8, 1958 : Prelinger archives
Load factors are up

In the 1960s, load factors were 60%, compared to ~80% today

- **1960**: 60% Load factor
- **1980**: 63% Load factor
- **2000**: 71% Load factor
- **2013**: 80% Load factor

In 1960 you were almost guaranteed to sit next to an empty seat next. Today most peak time flights are full.
## Seat width developments

<table>
<thead>
<tr>
<th>Year</th>
<th>Seat Width (inches)</th>
<th>Aircraft</th>
<th>Seats Abreast</th>
</tr>
</thead>
<tbody>
<tr>
<td>1958</td>
<td>16</td>
<td>707</td>
<td>8</td>
</tr>
<tr>
<td>1964</td>
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<td>18</td>
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<td>787</td>
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*Note: Abbreviations: A300, A320, A330, A340, A380, 767, 777, 787, 707, 737, 747, 727, 777, 737, 707, 727*
Boeing Dreamliner

Boeing air show material 2004

- More comfortable
  - Wider seats, wider aisles
- Biggest windows available
- Better cabin environment
- More convenient
  - Long range capability enables more non-stop travel
  - Faster cruise speed reduces trip time
Seats narrower than 17 inches allow 787s to be competitive
Boeing dream vs. Passenger reality

www.boeing.com

In economy class, 18.5-inch-wide seats, the widest in the industry …

http://www.boeing.com/boeing/commercial/777family/pf/pf_lrback.page

17 inch seats allow 777s to be competitive
17 inch seats allow 777s to be competitive and are the new standard on the 777X.
Seat width developments

“When it comes to flying long haul in economy, an inch makes a huge difference on passenger comfort”

Quote: Dr. Irshaad Ebrahim, The London Sleep Centre, 2013