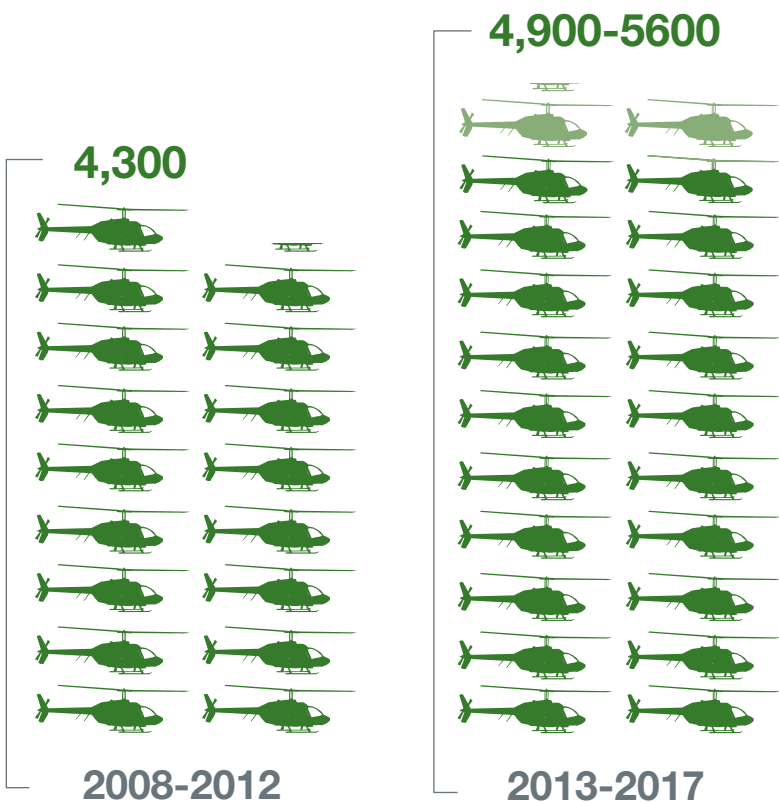


# TURBINE POWERED CIVILIAN HELICOPTER PURCHASE OUTLOOK

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

 =250 Helicopter deliveries

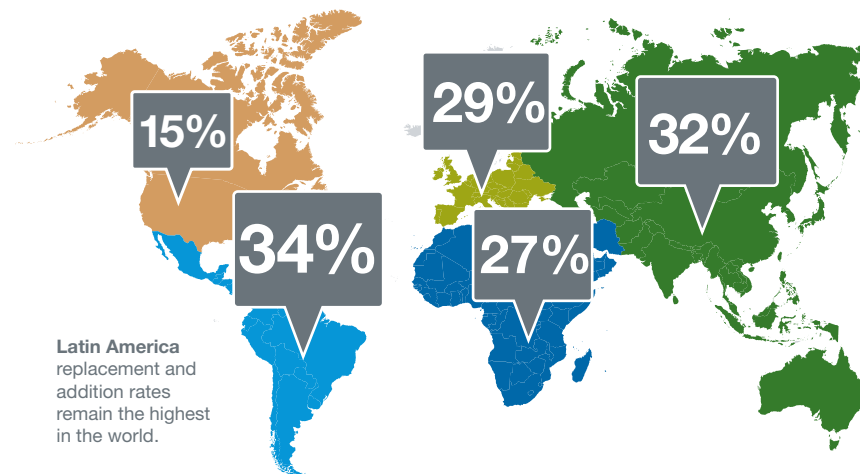


Projected 9% to 20% improvement during 2013-2017 period.

## Purchase Plans by Region

5-Year Survey respondent fleet replacement and expansion plan percentages

All Regions show improvement



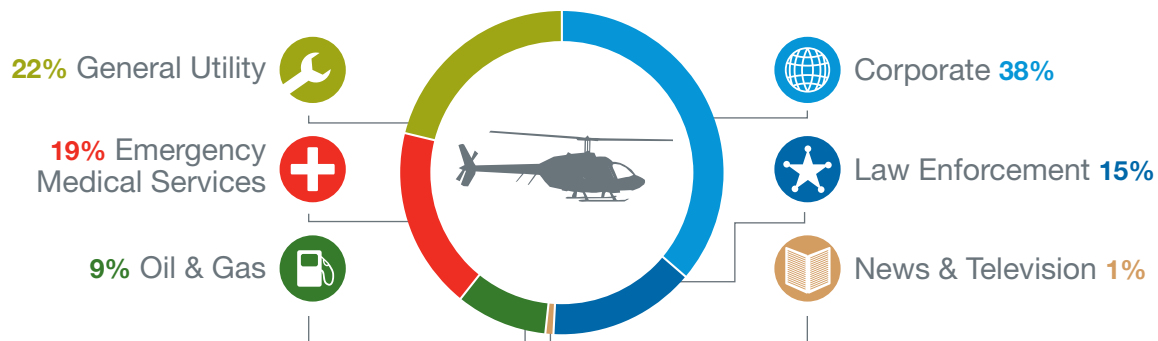
## Purchase Plans by Size

Light Single-Engine and Twin-Engine models account for 72% of expected purchases.



## Planned Usage of New Helicopters

Corporate, Utility, and EMS trending up; Law Enforcement and Oil & Gas usage sustained.



Total > 100% because some aircraft are dual-use or multi-purpose.