



Export Sales Opportunities for U.S. Aerospace and Defense Companies

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U.S. Commercial Service

The U.S. Commercial Service is part of the U.S. Department of Commerce, an agency of the United States government.

Trade specialists in over 100 U.S. cities and 83 countries worldwide

Our mission:

- ▶▶ To promote the export of goods & services from the United States, particularly by small- and medium-sized businesses
- ▶▶ To represent U.S. business interests internationally
- ▶▶ To help U.S. businesses find qualified international partners

Top U.S. Aerospace Export Markets

1. France
2. United Kingdom
3. China
4. Germany
5. Japan
6. Canada
7. Brazil
8. Singapore
9. Ireland
10. Korea
11. UAE
12. Qatar
13. Hong Kong
14. Indonesia
15. Turkey



France

- Over 70% of French Aerospace industry concentrated in civilian aircraft
- Main global companies Dassault Falcon Jet, Eurocopter and Airbus Aircraft
- French aerospace manufacturers seeking to subcontracting in dollar zone to better manage costs

February 3: Webinar - Becoming Part of the Airbus Supply Chain

Featuring David Williams, the new Head of the U.S. Sourcing Office for Airbus

Airbus is U.S. aerospace industries #1 export client purchasing \$10 billion a year from US companies

To Register go to: http://www.export.gov/eac/show_detail_trade_events.asp?EventID=31528&InputType=EVENT

June 20-26: Paris Air Show

Exhibition space at full capacity

U.S. Commercial Service opportunities for U.S. exhibitors and Visitors

- U.S. Ambassador's Reception
- Business-to-business meetings in offered in cooperation with BCI

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China



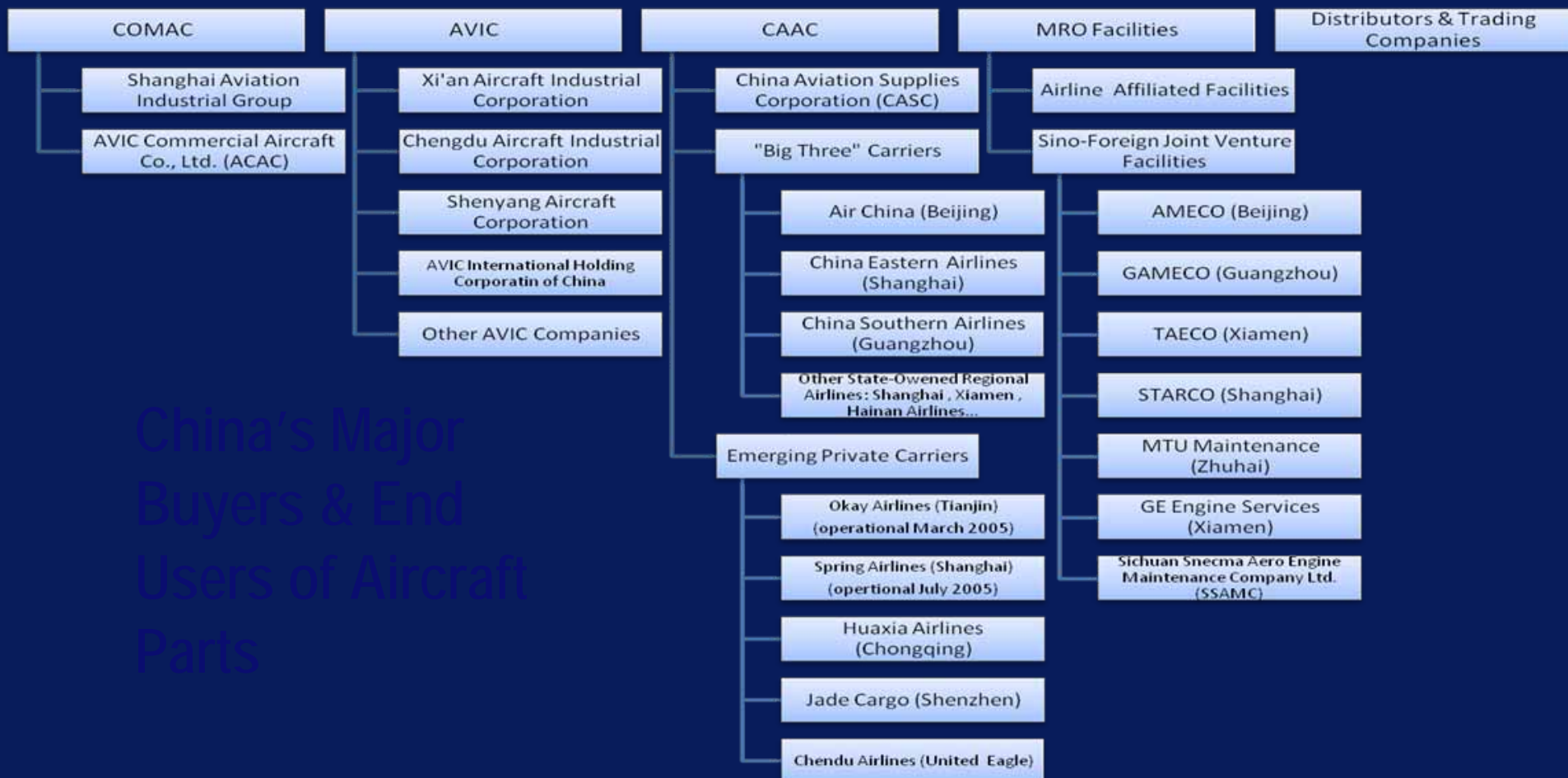
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- World's third largest civil aviation market
- Significant aircraft manufacturing supply chain and MRO sales opportunities
- Import market for aircraft parts and components is valued at more than \$1 billion, 4 fold increase over the past 10 years
- White House announced this past week \$19 billion Chinese purchase of for 200 Boeing airplanes.
- Air passenger volume expected to grow 8.3 percent annually
- Aircraft fleet expanding three to four times its present size ; by 2025, expected to reach 1500 commercial aircraft

HONG KONG:

- International air traffic hub with 90 airlines operating extensive flight connections to 150 destinations
- 10 major aircraft components and parts distributors MRO market and airlines in China and other Asian countries

Chinese Buyers and Major End Users of Aircraft Parts



China's Major
Buyers & End
Users of Aircraft
Parts

US manufacturers will supply COMAC



SYSTEM	SUPPLIER / PARTNERSHIP
Avionics System	GE aviation and COMAC and AVIC, Rockwell Collins and CECT, Honeywell and CAIC Electronics
Engine	CFM International and AVIC Commercial Aircraft Engine Co., Ltd
Electrical Power Supply	Xiamen Hansheng Qinling Aero Co., Ltd (Hamilton partnership)
Hydraulic System	Eaton Corp and COMAC Shanghai Aircraft Manufacture Co., Ltd
Water Supply and Treatment	Envirovac Inc (Zodiac) and Wuhan Hangda Aero Science & Technology Development Co., Ltd
APU	Honewell and AVIC Harbin Dongan Engine (Group) Corporation Ltd
Fire Proof and Alarm	Kidde Aerospace & Defense and B/E Aerospace Inc
Lingting System	Eaton and AVIC Shanghai Aero-electrical Appliance; Goodrich and Jiangsu Tongming Auto Lamp
Fueling System	Parker and AVIC Systems Co., Ltd
Deicing System	Goodrich and COMAC
Flight Control System	Honeywell and AVIC Flight Automatic Control Research Institute, Parker, HS, Moog and AVIC Qingan
Carbin Core System	Rockwell Collins and Shanghai Shiju Electronic Co., Ltd (No. 633 Institution)



Platforms for Entering the China Market

Asian Aerospace 2011 – A U.S. Department of Commerce Certified Trade Show

March 8 – March 10 in Hong Kong

- Commercial aerospace and civil aviation sectors. including MRO and engineering, air frame, avionics, aircraft interiors, airport technologies, air traffic control equipment, and business jets.
- Opportunities for U.S. Companies – Exhibit in US Pavilion, join Trade Mission for pre-arranged business meetings, and/or display your company information in the Aerospace Product Literature Center
- For Details and Registration: <http://www.buyusa.gov/hongkong/en/asianaerospace2011.html>

China Aerospace Manufacturing Supply Chain Development Trade Mission

- October 2010 US Commercial Service Assistant Secretary led 10 companies to meet with key Chinese OEMs and 1st tier supplier and to visit Zhuhai Air Show



Canada Market Trends

World's fifth largest aerospace market with \$24.1 billion in revenues

- Manufacturing leader in regional aircraft, commercial helicopters, turbine engines, flight simulators and in a range of aircraft systems and equipment; OEMS include Bombardier, Pratt & Whitney Canada, Rolls Royce Canada, Bell Helicopter Textron, Boeing Canada, Lockheed Martin Canada.
- 80 % of industry is located in Quebec (51%) and Ontario (29%)
- 83% of the industry is in civil aircraft manufacturing; 17% is in military/defense manufacturing
- Over 80% of Canadian aerospace production is exported; Over 50% of imports are from the USA

Leading Opportunities

- Bell Helicopter Textron's new Bell 429 Helicopter
- Canadian Companies with F-35 Joint Strike Fighter Major Contracts (valued at over 160 million)
- Boeing Dreamliner 787 and other Boeing Programs (valued at over \$1 billion)
- Bombardier C Series and other Bombardier Programs (valued at over \$1 billion)



U.S. Aerospace Supplier and Investment Mission, Montreal, Canada May 2-4, 2011

- Pre qualified meetings with Canadian aerospace procurement and engineering representatives
- We will promote your company to all Canadian aerospace companies nationally through our website
- Industry briefings by experts on opportunities in Canada's aerospace market
- Networking activities with Canadian aerospace industry and government representatives
- Special site visits to key Canadian aerospace companies
- Seminars on exporting and doing business in Canada
- Participate in an online seminar on How to Do Business with Bombardier and other OEMs prior to the trade mission

For details and application:

<http://www.buyusa.gov/canada/en/usaerospacesuppliermission2011.html>

Singapore



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- Singapore leads the rest of Asia in aircraft maintenance, engine repair, component repair and overhaul capabilities.
- By 2018, Singapore's aerospace output is expected to double to \$9.0 billion, according to projections by the Singapore Economic Development Board.
- Growth will be fuelled by the expansion of low-cost carriers and MRO servicing demands for new aircraft such as the Boeing 787 and Airbus 380.

Singapore Airshow 2012, February 14-19

U.S. Commercial Service Aerospace Executive Service provides:

- Shared promotion space on trade show floor
- Pre-arranged business and government meetings with Singaporean and regional business partners
- High visibility networking opportunities





Korea

- 6th largest military force and key strategic defense ally of the United States in maintaining peace and stability in north-east Asia
- Korean defense industry will be part of the country's economic stimulus with targets to increase Korean exports of defense systems to reach USD 1 billion in 2010.
- Strong push for technology transfer and offsets in international partnerships to reach these goals and strengthen domestic defense production capacity
- Approximately USD 26 billion spending plan for 2010 defense budget.
- Korea's major defense programs continue to be the K-2 Black Panther main battle tank, the T-50 supersonic fighter trainer, the K-9 Howitzer and the K11 air burst rifle.
- 50% of world shipbuilding industry concentrated in Korea with 10 leading world companies
- Maritime Defense Electronics and Systems opportunities - scheduled deployment of 9 2,500 ton class frigates by 2018



Seoul Aerospace & Defense Expo (ADEX) October 18 -23, 2011

- 300 companies exhibiting from 30 countries
- US Commercial Service Korea support for U.S. companies attending and exhibiting

Marine Week 2011: International Shipbuilding, Marine Equipment and Defense Exhibition. Oct. 26-29, 2011-Busan, Korea

Korea's leading exhibition with over 800 companies from 30 countries and 40,000 qualified trade visitors. Consists of 3 sections:

Kormarine 2011 (Marine Equipment) – first time USA Pavilion with extensive services for U.S. companies to meet Korean distributors

Naval & Defence 2011(Defense)

Sea-Port 2011(Shipbuilding)



UAE

- Military and major commercial airlines are currently in process of expanding aircraft fleets over the next several years.
- Defense authorities continue to launch new programs and push for modernizing the capabilities of the land, air, and naval forces.
- The market for small and medium-sized business jets in the Middle East continues to expand at a rapid pace, emerging as a key growth area in the region's aviation sector.
- UAE has focused on the development of its own aircraft and missile systems.

International Defense Exhibition & Conference 2011 - February 20-24 in Abu Dhabi

Dubai Air show – November 13-17 in Dubai

Turkey



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- Military expenditure of US\$13.7 billion in 2010, focused on the defense industry and is expected to grow 4.90% by 2015.
- 2nd largest NATO Army and 2nd largest F16 Fleet
- Increasing efforts to upgrade and modernize its military hardware.

U.S. Commercial Service hosted Turkish Defense Market Webinar Briefing – July 2010
Proceedings featuring US Embassy (CS and ODC), MOD and private industry available at:
http://www.buyusa.gov/eme/turkey_defense.html

IDEF Tradeshow: May 10-14 in Istanbul, Turkey

- More than 500 companies from 50 countries are expected to exhibit their product.
- U.S. Certified Trade Show

Aerospace & Defense Trade Mission to Turkey (tentatively late 2011)



India

Civilian Aviation:

- India ranks fourth after US, China and Japan in terms of domestic traffic.
- Domestic airlines in India currently operate 336 aircrafts with another 293 to be delivered by 2014.

Defense Aviation: Largest Global Buyer, \$ 60 Billion over Next 5-7 Years

- Russia is historic supplier (70% of market); offsets are important considerations

U.S. –India defense relationship on upswing. Few recent U.S. ‘wins’ include:

- -Boeing’s P8I worth \$ 2.1 billion
- -Lockheed Martin C-130J worth \$ 1 Billion

\$ 25 billion major aerospace programs where U.S. companies are currently competing include:

- \$ 11 billion MMRCA, \$ 4 billion transport aircrafts, \$ 4 billion Jaguar and LCA engines,
- \$ 3 billion heavy lift and attack helicopters, \$ 2 billion in maritime-reconnaissance aircrafts
- \$ 1 billion trainer aircrafts



Recent India Aerospace & Defense Business Deals

- Announced in conjunction with President Obama's November 2010 India trip were significant U.S. aerospace export transactions including by: Boeing of C17 transport aircraft and GE sale of engines for light combat aircraft
- November 2009 US Commercial Service Aerospace Supplier Development Trade Mission to India
- Aero India 2011, February 9-13





Maximize Your visit to International Trade Shows

At many shows: US Embassy – US Commercial Service offices provide complimentary:

- US company promotion to industry players throughout Europe prior to show
- Embassy briefings and on-site counseling assistance and market research expertise

Gold Key – before or during trade show where we provide:

- Pre-screened appointment schedule arranged for you before you travel overseas
- Customized pre- and post-visit market and industry briefings with our local trade specialists
- Help with travel, accommodations, interpreter service, and clerical support





Foreign Military Sales

- Foreign Military Sales (FMS) represented \$38 billion in new sales opportunities for U.S. companies during 2009.
- The FMS program allows approved foreign governments and international organizations to enter into contractual agreements with the US Department of Defense to provide defense articles, defense services and defense training.
- Featured presentations by US Department of Defense's Defense Security Cooperation Agency, Canadian Embassy's lead defense procurement expert ,and by U.S. companies successful in winning FMS business for programs worldwide.
- Archived Webinar (held February 2010) available for download only until March 1, 2011.
- To access, register at:
<https://emenuapps.ita.doc.gov/ePublic/newWebinarRegistration.jsp?SmartCode=0Q6X>



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Listing of U.S. Contacts

And More...