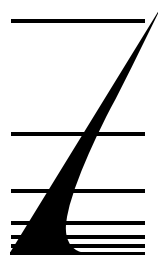


The Market for Military Fixed-Wing Trainer Aircraft

Product Code #F617

A Special Focused Market Segment Analysis by:



FORECAST INTERNATIONAL

Analysis 3

The Market for Military Fixed-Wing Trainer Aircraft 2010-2019

Table of Contents

Executive Summary	3
Introduction	3
Trends	4
Competitive Environment	7
Market Statistics	13
Table 1 - The Market for Military Fixed-Wing Trainer Aircraft Unit Production by Headquarters/Company/Program 2010 - 2019	16
Table 2 - The Market for Military Fixed-Wing Trainer Aircraft Value Statistics by Headquarters/Company/Program 2010 - 2019	19
Figure 1 - The Market for Military Fixed-Wing Trainer Aircraft Unit Production 2010-2019 (Bar Graph)	22
Figure 2 - The Market for Military Fixed-Wing Trainer Aircraft Value of Production 2010-2019 (Bar Graph)	22
Table 3 - The Market for Military Fixed-Wing Trainer Aircraft Unit Production % Market Share by Headquarters/Company 2010 - 2019	23
Table 4 - The Market for Military Fixed-Wing Trainer Aircraft Value Statistics % Market Share by Headquarters/Company 2010 - 2019	24
Figure 3 - The Market for Military Fixed-Wing Trainer Aircraft Unit Production % Market Share by Headquarters 2010-2019 (Pie Chart)	25
Figure 4 - The Market for Military Fixed-Wing Trainer Aircraft Value Statistics % Market Share by Headquarters 2010-2019 (Pie Chart)	25
Table 5 - The Market for Military Jet Trainer Aircraft Unit Production by Headquarters/Company/Program 2010 - 2019	26
Table 6 - The Market for Military Jet Trainer Aircraft Value Statistics by Headquarters/Company/Program 2010 - 2019	28
Figure 5 - The Market for Military Jet Trainer Aircraft Unit Production 2010-2019 (Bar Graph)	30
Figure 6 - The Market for Military Jet Trainer Aircraft Value of Production 2010-2019 (Bar Graph)	30

Analysis 3

Table 7 - The Market for Military Jet Trainer Aircraft
 Unit Production % Market Share by Headquarters/Company 2010 - 2019.....31

Table 8 - The Market for Military Jet Trainer Aircraft
 Value Statistics % Market Share by Headquarters/Company 2010 - 201932

Table 9 - The Market for Military Turboprop Trainer Aircraft
 Unit Production by Headquarters/Company/Program 2010 - 2019.....33

Table 10 - The Market for Military Turboprop Trainer Aircraft
 Value Statistics by Headquarters/Company/Program 2010 - 201935

Figure 7 - The Market for Military Turboprop Trainer Aircraft
 Unit Production 2010-2019 (Bar Graph).....37

Figure 8 - The Market for Military Turboprop Trainer Aircraft
 Value of Production 2010-2019 (Bar Graph)37

Table 11 - The Market for Military Turboprop Trainer Aircraft
 Unit Production % Market Share by Headquarters/Company 2010 - 2019.....38

Table 12 - The Market for Military Turboprop Trainer Aircraft
 Value Statistics % Market Share by Headquarters/Company 2010 - 2019.....39

Table 13 - The Market for Military Piston Trainer Aircraft
 Unit Production by Headquarters/Company/Program 2010 - 201940

Table 14 - The Market for Military Piston Trainer Aircraft
 Value Statistics by Headquarters/Company/Program 2010 - 2019.....40

Figure 9 - The Market for Military Piston Trainer Aircraft
 Unit Production 2010-2019 (Bar Graph).....41

Figure 10 - The Market for Military Piston Trainer Aircraft
 Value of Production 2010-2019 (Bar Graph)41

Conclusion42

* * *

PROGRAMS

The following reports are included in this section: (**Note:** a single report may cover several programs.)

Advanced European Jet Pilot Training Program
Aero L-159
Alenia Aermacchi M-346
BAE Systems Hawk
Boeing/BAE Systems T-45
EADS Mako
Embraer EMB-314 Super Tucano
Fuji T-5/T-7
Hawker Beechcraft T-6A Texan
Hindustan Aeronautics HJT-36
Hongdu/PAC K-8
Korea Aerospace Industries KT-1
Korea Aerospace Industries T-50/A-50/FA-50
LMAASA AT-63
Pilatus PC-9
Pilatus PC-21
Yakovlev Yak-130

Introduction

This analysis covers active programs within the fixed-wing military training market, including aircraft powered by jet, turboprop, and piston engines.

Several aircraft that are often used as trainers are not included within our market forecast because they do not train the "first and second seaters" who perform the pilot-in-command or copilot/weapons officer roles in military aircraft. Specialist mission training aircraft, such as the Boeing 737 (U.S. Navy T-43), a navigation trainer, are excluded. All the aircraft covered in this analysis provide training for fighter and attack aircraft pilots.

Forecasting military trainer demand and production entails analyzing military inventories by type of trainer and age. Each nation's military expenditures and research and development plans are evaluated. Future military budgets are examined and force structure assumptions made, and military equipment priorities are established that determine what types of and how many frontline combat and special-purpose military aircraft will be required. This major military aircraft demand scenario then helps determine the 10-year demand for trainer aircraft.

When the total trainer demand curve is established, each aircraft program is studied to ascertain competitive advantage and disadvantage and any political, societal, or economic factors that ultimately determine the marketing and sales success or defeat of a particular trainer family. This is obviously a subjective methodology and one that changes with our overall assessment of worldwide defense spending.

This analysis takes a broad look at the military fixed-wing trainer market as a whole. Detailed information and forecast rationales on each program are provided in the individual reports that cover the aircraft listed. The

following trainers and trainer programs were reviewed in preparing this analysis:

JET TRAINERS

Alenia Aermacchi M-346
Aero L-159
BAE Hawk
Boeing/BAE T-45
EADS Mako
HAL HJT-36
Hongdu/PAC K-8
Hongdu L-15
Korea Aerospace T/A-50
LMAASA AT-63
MiG-AT
Yak-130

TURBOPROP TRAINERS

Alenia Aermacchi SF.260TP
Embraer EMB-314 Super Tucano Series
Fuji Heavy Industries T-5/T-7
Hawker Beechcraft T-6A/B
Korea Aerospace KT-1
Pilatus PC-9
Pilatus PC-21

PISTON TRAINERS

Alenia Aermacchi SF.260

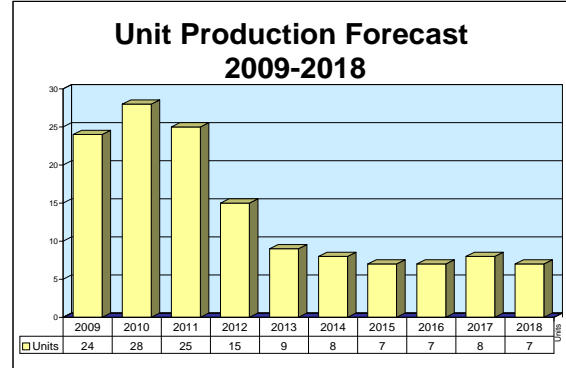
Projected military sales of light general aviation aircraft used by military customers in the primary training role are not included in this analysis. These types of piston trainers – the Cessna 172, for example – are produced at the same factories at which civilian aircraft are produced and are all but identical to their civilian counterparts. The limited number of light piston trainer aircraft that make their way into military inventories each year are reflected in Forecast International's *Civil Aircraft Forecast*.

* * *

Embraer EMB-314 Super Tucano

Outlook

- Embraer continues to build the Super Tucano order book
- More than 165 have now been sold
- Deliveries to the Colombian Air Force have been completed



Orientation

Description. Single-turboprop-powered military trainer and light attack aircraft. Produced in both two-seat and single-seat versions.

Sponsor. Brazilian Air Force.

Status. Production of the Super Tucano. The basic Tucano is no longer in production.

Total Produced. Through 2008, Embraer had produced two new-build Super Tucano prototypes, 27

Super Tucano production aircraft, and 63 ALX aircraft. Of the original Tucano model, Embraer produced approximately 348 aircraft, Short Brothers delivered 158, and AOI assembled 124.

Application. Military training and light attack.

Price Range. Super Tucano, \$9.0 million in 2009 U.S. dollars.



Super Tucano

Source: Embraer

Embraer EMB-314 Super Tucano

Contractors

Prime

Embraer - Empresa Brasileira de Aeronáutica SA	http://www.embraer.com , Av Brigadeiro Faria Lima, 2170, São José dos Campos, 12227-901 São Paulo, Brazil, Tel: + 55 12 3927 1000, Prime
-------------------------------------------------------	-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Subcontractor

Hartzell Propeller Inc	One Propeller Pl, Piqua, OH 45356-2656 United States, Tel: + 1 (937) 778-4200, Fax: + 1 (937) 778-4321 (Five-Blade Propeller)
Martin-Baker Aircraft Co Ltd	http://www.martin-baker.com , Higher Denham, Near Uxbridge, UB9 5AJ Middlesex, United Kingdom, Tel: + 44 0 1895 832214, Fax: + 44 0 1895 832587, Email: information@martin-baker.co.uk (Mk 10LCX Ejection Seat)
Pratt & Whitney Canada	http://www.pwc.ca , 1000 Marie-Victorin Blvd, Longueuil, J4G 1A1 Quebec, Canada, Tel: + 1 (450) 677-9411, Fax: + 1 (450) 647-3620 (PT6A-68C Turboprop Engine)

Comprehensive information on Contractors can be found in Forecast International's "International Contractors" series. For a detailed description, go to www.forecastinternational.com (see Products & Samples/Governments & Industries) or call + 1 (203) 426-0800.

Contractors are invited to submit updated information to Editor, International Contractors, Forecast International, 22 Commerce Road, Newtown, CT 06470, USA; rich.pettibone@forecast1.com

Technical Data

(EMB-314)

Design Features. Cantilever low-wing monoplane with retractable tricycle landing gear, cantilever horizontal stabilizers, and a slightly swept vertical fin.

	<u>Metric</u>	<u>U.S.</u>
Dimensions		
Wingspan	11.14 m	36.55 ft
Length	11.38 m	37.33 ft
Height	3.97 m	13.0 ft
Weight		
Max takeoff weight	5,400 kg	11,905 lb
Performance		
Max level speed (clean)	590 km/h	320 kt
Cruise speed	520 km/h	280 kt
Service ceiling	10,665 m	35,000 ft
Ferry range (internal fuel)	1,445 km	780 nm
Ferry range (with external tanks)	2,855 km	1,540 nm

Propulsion

EMB-314	(1)	Pratt & Whitney Canada PT6A-68C turboprop engine rated 1,193 kW (1,600 shp).
EMB-312	(1)	Pratt & Whitney Canada PT6A-25C turboprop engine rated 559 kW (750 shp).
Shorts S312 (T1)	(1)	AlliedSignal Engines (Garrett) TPE331-12B-701A turboprop engine rated 820 kW (1,100 shp).

Armament

One 12.7mm machine gun is mounted on each wing. Five hardpoints exist, one on the fuselage centerline and four underwing. Maximum external load is 1,550 kilograms (3,420 lb). Among the armament capable of being carried are machine gun pods, bombs, rocket pods, and (on the two outboard stations) air-to-air missiles.

Embraer EMB-314 Super Tucano

Variants/Upgrades

EMB-314. Upgraded Tucano version; also called the Tucano H or the Super Tucano. Formerly called the EMB-312H. The Super Tucano features a 1.37-meter (4.49-ft) fuselage extension with the addition of sections fore and aft of the cockpit to restore its center of gravity and stability. Other features include a strengthened airframe and cockpit pressurization. The aircraft is powered by the Pratt & Whitney Canada PT6A-68C engine, rated 1,193 kW (1,600 shp).

A proof-of-concept model (a converted EMB-312) flew in September 1991, powered by a PT6A-67R engine rated 1,193 kW (1,600 shp). A second prototype flew for the first time in May 1993, powered by a PT6A-68A engine rated 969 kW (1,300 shp). A third prototype flew in October 1993.

In December 2006, Embraer delivered the first five Super Tucanos to the Colombian Air Force out of an order for 25. Elbit Systems supplies various avionics for the Colombian Air Force Super Tucanos. In addition, FLIR Systems has engineered a flexible installation for the aircraft, which allows installation of either the company's BRITE Star or StarSAFIRE III thermal imaging systems.

ALX. Light attack version of the Super Tucano developed by Embraer for the Brazilian Air Force. The ALX is powered by a PT6A-68C engine rated 1,193 kW (1,600 shp), driving a Hartzell five-blade propeller. The aircraft has five hardpoints for external stores. Avionics include a navigation/attack system including a head-up display, multifunction displays, a central mission computer, an inertial reference system, and GPS equipment. The ALX has a Kevlar-based armored

cockpit, which is pressurized and fitted with zero-zero ejection seats. The cockpit is also night vision goggle (NVG) compatible.

In late 1996, Embraer selected the Israeli firm Elbit Systems to supply the mission avionics for the ALX. For this contract, Elbit defeated GEC-Marconi and Sextant Avionique. The Israeli company supplies such equipment as the mission computer, head-up displays, and navigation and stores management systems.

In August 1995, the Brazilian Ministry of Aeronautics awarded Embraer a \$50 million contract for ALX development. The two Super Tucano prototypes built in 1993 were modified to serve as ALX prototypes. These made their initial flights in their new configuration in 1996 and 1997, respectively. The initial flight of a production-configured ALX, further modified from one of the prototypes, occurred in June 1999.

In August 2001, Embraer signed a contract with the Brazilian Air Force for 76 ALXs, plus options for an additional 23 aircraft. Embraer delivered the initial ALX to the service in December 2003.

In 2005, the Air Force exercised the 23 options, converting them into firm orders. This action increased the service's ALX firm order total to 99 aircraft, including 49 single-seaters and 50 two-seaters.

The Air Force's single-seat ALX version is designated the A-29A, while the two-seat model is called the A-29B. The service plans to use 30 of its A-29Bs to replace aging EMB-326 Xavante advanced trainers, though it will retain some Xavantes for use as fighter lead-in trainers.

Program Review

Background. Embraer announced in January 1978 its intention to develop the PT6A-25C-powered EMB-312 for the Brazilian Air Force and export customers. The aircraft, designated T-27 in Brazilian service, is a low-wing, tandem-seat design incorporating retractable tricycle-type landing gear. It is used for primary, advanced, and aerobatic training at altitudes up to 9,150 meters (30,000 ft).

Weapons Trainer. As a weapons-delivery trainer, and for tactical use, the EMB-312 has four underwing hardpoints capable of carrying 1,000 kilograms (2,204 lb) of bombs, rockets, or machine guns.

Licensed Assembly Programs

Egyptian Program. Under the terms of a \$181 million contract signed in December 1983, Embraer delivered 10 Tucanos in flyaway condition to the Egyptian Air Force beginning in late 1984. An additional 110 aircraft were then supplied to the Arab Organization for Industrialization (AOI) in kit form for assembly at Heliopolis. Out of the original order of 120 aircraft, Egypt received 40 Tucanos, with the other 80 assembled for Iraq. The Egyptian contract also included options on another 60 units (40 for Egypt and 20 for Iraq). The first Egyptian-assembled Tucano was delivered in 1985. Egypt placed an order in 1989 for an additional 14 Tucanos.

Embraer EMB-314 Super Tucano

Embraer/Shorts and AST 412. The Brazilian manufacturer teamed with Short Brothers of Northern Ireland in May 1984 to promote the Tucano for the British Royal Air Force's AST 412 Jet Provost trainer replacement requirement. This design was subsequently selected in March 1985, and Shorts built 130 aircraft for the RAF (including 25 assembled from Embraer-supplied kits). The RAF also held options for another 15 units. These options were never exercised.

The Shorts-built S312 Tucano is powered by the uprated AlliedSignal (Garrett) TPE331-12B turboprop, and is fitted with a fuselage-mounted ventral airbrake and a two-piece canopy with a birdproof windshield. The aircraft incorporates other changes as well, including a Hawk-type cockpit layout, small wingtip strakes, and a structural reinforcement for increased speed, maneuver loads, and a required 12,000-hour fatigue life.

The first Garrett-powered Tucano flew in Brazil in February 1986, and was subsequently shipped to Shorts in Belfast. The first Shorts-assembled aircraft was formally rolled out in January 1987, but delays in the program slipped initial deliveries into September 1988.

EMB-312F. In October 1991, the French Air Force formalized an order for up to 80 EMB-312F Tucanos. Two pre-series aircraft were delivered in 1993, and 48 aircraft were delivered over the period 1995-1997. France also held options for an additional 30 EMB-312F Tucanos. These options were never exercised.

The EMB-312F differs from the standard Tucano in that it features a 10,000-hour fatigue life airframe, a speedbrake, an angle-of-attack indicator, propeller and canopy de-icing, repositioned refueling and jacking points, and a French-supplied avionics package.

Super Tucano

JPATS Candidate. In August 1993, Embraer and the U.S. company Northrop (now known as Northrop Grumman) announced that they had finalized a cooperation agreement for joint participation in an effort to compete for the U.S. Air Force/U.S. Navy Joint Primary Aircraft Training System (JPATS) program. (Embraer and Northrop had signed a preliminary agreement in May 1991.) The two companies unsuccessfully bid the uprated EMB-312H Super Tucano version, now called the EMB-314. The JPATS program involves the procurement of over 700 aircraft for the two U.S. services.

Development of the Super Tucano began in January 1991, and a proof-of-concept prototype flew for the first time in September 1991. This aircraft, which was a converted EMB-312, was powered by a PT6A-67R engine. In 1993, two new-build prototypes were completed. These aircraft were powered by the PT6A-68A powerplant. In August 1994, the Super Tucano received a provisional type certificate from the CTA, the Brazilian certification authority.

Related News

100th Super Tucano Delivered – Embraer delivered the 100th Super Tucano in May 2009. The Brazilian Air Force (FAB), which had established the technical and operational requirements for the Super Tucano, and which has ordered 99 of the aircraft (in the ALX variant), received the milestone unit.

The Super Tucano entered service with the FAB in December 2003. "We are proud to deliver the 100th aircraft specifically to the FAB, which was the first to operate the Super Tucano," said Orlando Jose Ferreira Neto, Embraer executive vice president for the defense market. "The FAB's ability to establish challenging requisites that reflect real operating conditions was of paramount importance to our development of such a successful airplane." (Embraer, 5/09)

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Timetable

<u>Month</u>	<u>Year</u>	<u>Major Development</u>
Jan	1978	EMB-312 design work begun
Dec	1978	Embraer awarded development contract
Aug	1980	Prototype first flight
Sep	1983	Initial production deliveries
May	1984	Agreement with Shorts announced
Mar	1985	Tucano selected as AST 412 winner

Embraer EMB-314 Super Tucano

<u>Month</u>	<u>Year</u>	<u>Major Development</u>
	1985	First flight of Egyptian-assembled Tucano
Feb	1986	First flight of Garrett-powered Tucano
Sep	1988	First Shorts-built T1 delivered to RAF
Sep	1991	First flight of EMB-312H proof-of-concept aircraft
May	1993	Initial flight of first Super Tucano prototype
Oct	1993	Initial flight of second Super Tucano prototype

Worldwide Distribution/Inventories

The geographic distribution of Tucanos and Super Tucanos as of July 2009 is as follows:

Angola	5
Argentina	22
Brazil	186
Colombia	39
Egypt	54
France	47
Honduras	9
Iran	15
Kenya	11
Kuwait	16
Paraguay	3
Peru	18
United Kingdom	67
United States	2
Venezuela	21

Forecast Rationale

Worldwide interest in the Super Tucano has really taken off in the past two years. The aircraft has become quite popular among air forces in its home region of Latin America, while operators outside the region are starting to show significant interest in the type.

In the past 12 months, Embraer has announced sales of the Super Tucano to three export customers in Latin America, thereby expanding the Super Tucano order book by 44 aircraft. In August 2008, the company signed a contract with the Chilean Air Force for 12 Super Tucanos. The Super Tucano, which will be used by the service as a basic trainer, was selected for the award over the Pilatus PC-21. Deliveries are slated to start in the second half of 2009.

In late 2008, Embraer finalized a contract for the sale of eight Super Tucanos to the Dominican Republic. The aircraft are to be used to perform internal security and border patrol missions. This deal was likely particularly satisfying for Embraer. The firm had signed a contract back in 2001 to supply 10 Super Tucanos to the Dominican Republic, but that contract was later canceled.

Finally, in March 2009, Embraer announced a deal to supply 24 Super Tucanos to the Ecuadorian Air Force for use in border patrol missions and pilot training. Though not announced until 2009, the contract had actually been finalized sometime in 2008. Deliveries are scheduled to begin in late 2009.

Embraer EMB-314 Super Tucano

In February 2008, Embraer delivered a Super Tucano to EP Aviation, a subsidiary of the U.S.-based private security firm Blackwater Worldwide. The aircraft is not fitted with weaponry, and is being used for training purposes in the U.S.

In August 2008, Embraer completed delivery of 25 Super Tucanos to the Colombian Air Force. Meanwhile, deliveries are continuing of 99 ALXs to the Brazilian Air Force. By the end of 2008, the service had taken delivery of 63 of the 99 aircraft.

In March 2009, Capt. Mark Mullins, deputy director of the U.S. Navy's Irregular Warfare Office, said that the Navy has leased, tested, and armed at least one Super Tucano. The aircraft underwent a year of testing. The aim of the effort is to provide an aircraft that can support U.S. Special Operations Forces. The Navy intends to deploy four Super Tucanos in combat operations as soon as possible; the service is hoping to fund this phase of the program in conjunction with the U.S. Air Force and the U.S. Marine Corps.

Continuing Export Interest

Besides the PC-21, other sales competitors to the Super Tucano include the Hawker Beechcraft T-6 and the Korea Aerospace Industries (KAI) KT-1. Like the Super Tucano, these aircraft are all turboprop-powered. Though jet-powered, the Alenia Aermacchi M-311 trainer provides some competition to the Super Tucano as well.

Further export sales are likely for the Super Tucano, with perhaps the best opportunities for such sales continuing to be found in Latin America. Indeed, the Bolivian Air Force is planning to acquire an unspecified number of Super Tucanos to replace its fleet of 11 Pilatus PC-7s. The service utilizes the PC-7s in the counterinsurgency role. The Guatemalan Air Force, meanwhile, has shown interest in acquiring six Super Tucanos.

Beyond Latin America, the Super Tucano is a candidate to fill requirements for basic trainers in Australia, the

Philippines, Thailand, the United Arab Emirates, and the U.K. The Australian requirement is for up to 50 aircraft, to replace 65 Pilatus PC-9/As from 2012.

The UAE Air Force intends to acquire up to 40 basic trainers to replace its PC-7 fleet. The Super Tucano was shortlisted in February 2007 for this acquisition along with the M-311 and the PC-21. Various press reports appeared in late 2007 claiming that the Super Tucano had been eliminated from the contest. However, Embraer says that it has received no notification of such an action. The current status of the Super Tucano in the UAE contest thus remains uncertain.

The Super Tucano is a potential candidate for the U.K.'s new Military Flying Training System (MFTS) program. Under the MFTS, a fleet of 40-50 basic trainers is to be acquired to replace the Royal Air Force's fleet of 67 Shorts Tucanos. As a low-cost alternative to acquiring new-build aircraft, however, Shorts and Marshall Aerospace have teamed to propose an upgrade and service life extension program for the 67 existing Tucanos. The upgrade would involve various aerodynamic improvements as well as installation of a CMC Electronics glass cockpit and mission computers. In addition, engine power would be increased by 10 percent. Shorts and Marshall say that the upgrade could be provided for 10-15 percent of the cost of a new-build aircraft, and would enable the Tucanos to continue in service for more than 20 years.

Embraer designed the Super Tucano from the outset with light attack capability. Incorporation of this capability broadens the market appeal of the aircraft. In its sales and marketing campaigns, Embraer emphasizes the Super Tucano's utility in the counterinsurgency (COIN) or dual COIN/training role.

Embraer is currently engaged in discussions concerning a possible sale of eight Super Tucanos for use by the Iraqi Air Force in the COIN role. Other contenders for this sale, which is being conducted by the U.S. Air Force, include the KT-1 as well as the armed AT-6 version of the T-6.

Embraer EMB-314 Super Tucano

Ten-Year Outlook

ESTIMATED CALENDAR YEAR UNIT PRODUCTION												
Designation or Program	High Confidence					Good Confidence			Speculative			Total
	Thru 2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	
Embraer - Empresa Brasileira de Aeronáutica SA												
ALX <> PT6 A -68												
	63	10	10	10	6	0	0	0	0	0	0	36
Super Tucano <> PT6 A -68												
Note: Does not include the proof-of-concept aircraft, which was a converted EMB-312.												
	29	14	18	15	9	9	8	7	7	8	7	102
Subtotal	92	24	28	25	15	9	8	7	7	8	7	138
Total	92	24	28	25	15	9	8	7	7	8	7	138

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Worldwide Inventories			Basic Military Library			International Military Markets (A Subset of G&I above)		
Aerospace Systems (Pages 12-13)			Binder	\$315	\$595	Binder	\$270	\$510
CD	\$50	\$95	DVD	\$50	\$95	DVD	\$50	\$95
Weapons Systems (Page 22)			Binder & DVD	\$365	\$690	Binder & DVD	\$320	\$605
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CD	\$50	\$95	Civil/Commercial Library			Naval		
Power Systems (Page 25)			Binder	\$360	\$680	Binder	\$90	\$170
Hard Copy	\$45	\$85	DVD	\$50	\$95	DVD	\$50	\$95
Focused Market Segment Analyses (Pages 30-34)			Binder & DVD	\$410	\$775	Binder & DVD	\$140	\$265
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Market Intelligence Libraries (Pages 26-27)			Market Intelligence Group Libraries (Pages 28-29)			Power		
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DVD	\$50	\$95	Binder & DVD	\$410	\$775	Binder & DVD	\$140	\$265
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Binder & RT	\$1,575	\$2,975	Electronics			Weapons		
Complete Military Library			Binder	\$360	\$680	Binder	\$180	\$340
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DVD	\$50	\$95	Binder & DVD	\$410	\$775	Binder & DVD	\$230	\$435
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Phone: (44) 1608 643281

Fax: (44) 1608 641159

E-Mail: support@hawkinformation.com

Website: www.hawkinformation.com

Contact: Mr. Michael Hobbs

FRANCE

HAWK ASSOCIATES LTD.

6 Rue de Levis, Paris 75017 FRANCE

Phone: (33) 1 4294 0693

Fax: (33) 1 4294 0433

E-Mail: france@hawkinformation.com

Contact: Mr. Edward Hobbs

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Fax: (86)10 6586 6970

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Contact: Mr. Billy Bai

JAPAN

AVIATION RESEARCH INSTITUTE

3-4-2 Mukojima

Sumida-ku

Tokyo 131-0033 JAPAN

Phone: (81) 3 5819 3491

Fax: (81) 3 5819 2973

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Website: www.forecast1.co.kr

Contact: Ms. Nam Hee Kim

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Block 18, Knowledge Village

PO Box 502221

Dubai, UNITED ARAB EMIRATES

Phone: (971) 4 364 4521

Fax: (971) 4 360 4726

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Website: www.act-institute.com

Contact: Mr. Amir Khalaf

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