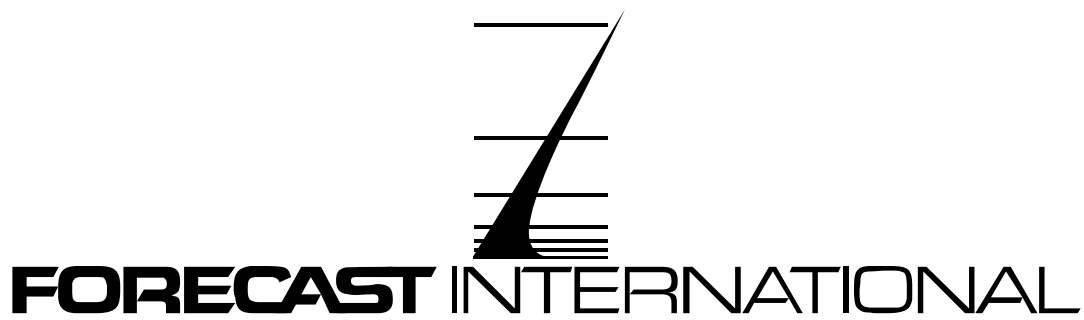


The Market for Military Fixed-Wing Trainer Aircraft

Product Code #F617

A Special Focused Market Segment Analysis by:



Analysis 3

The Market for Military Fixed-Wing Trainer Aircraft 2011-2020

Table of Contents

Executive Summary	3
Introduction	3
Trends	4
Competitive Environment	7
Market Statistics	12
Table 1 - The Market for Military Fixed-Wing Trainer Aircraft Unit Production by Headquarters/Company/Program 2011 - 2020	14
Table 2 - The Market for Military Fixed-Wing Trainer Aircraft Value Statistics by Headquarters/Company/Program 2011 - 2020	17
Figure 1 - The Market for Military Fixed-Wing Trainer Aircraft Unit Production 2011-2020 (Bar Graph)	20
Figure 2 - The Market for Military Fixed-Wing Trainer Aircraft Value of Production 2011-2020 (Bar Graph)	20
Table 3 - The Market for Military Fixed-Wing Trainer Aircraft Unit Production % Market Share by Headquarters/Company 2011 - 2020	21
Table 4 - The Market for Military Fixed-Wing Trainer Aircraft Value Statistics % Market Share by Headquarters/Company 2011 - 2020	22
Figure 3 - The Market for Military Fixed-Wing Trainer Aircraft Unit Production % Market Share 2011-2020 (Pie Chart)	23
Figure 4 - The Market for Military Fixed-Wing Trainer Aircraft Value Statistics % Market Share 2011-2020 (Pie Chart)	23
Table 5 - The Market for Military Jet Trainer Aircraft Unit Production by Headquarters/Company/Program 2011 - 2020	24
Table 6 - The Market for Military Jet Trainer Aircraft Value Statistics by Headquarters/Company/Program 2011 - 2020	26
Figure 5 - The Market for Military Jet Trainer Aircraft Unit Production 2011-2020 (Bar Graph)	28
Figure 6 - The Market for Military Jet Trainer Aircraft Value of Production 2011-2020 (Bar Graph)	28
Table 7 - The Market for Military Jet Trainer Aircraft Unit Production % Market Share by Headquarters/Company 2011 - 2020	29

Analysis 3

Table 8 - The Market for Military Jet Trainer Aircraft
Value Statistics % Market Share by Headquarters/Company 2011 - 202030

Table 9 - The Market for Military Turboprop Trainer Aircraft
Unit Production by Headquarters/Company/Program 2011 - 2020.....31

Table 10 - The Market for Military Turboprop Trainer Aircraft
Value Statistics by Headquarters/Company/Program 2011 - 2020.....32

Figure 7 - The Market for Military Turboprop Trainer Aircraft
Unit Production 2011-2020 (Bar Graph).....34

Figure 8 - The Market for Military Turboprop Trainer Aircraft
Value of Production 2011-2020 (Bar Graph).....34

Table 11 - The Market for Military Turboprop Trainer Aircraft
Unit Production % Market Share by Headquarters/Company 2011 - 202035

Table 12 - The Market for Military Turboprop Trainer Aircraft
Value Statistics % Market Share by Headquarters/Company 2011 - 2020.....36

Conclusion37

* * *

PROGRAMS

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

Advanced European Jet Pilot Training Program
Alenia Aermacchi M-346
BAE Systems Hawk
Embraer EMB-314 Super Tucano
FAdeA AT-63
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
Pilatus PC-21
U.S. Air Force T-X
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
BAE Systems Hawk
EADS Mako
FAdeA AT-63
HAL HJT-36
Hongdu/PAC K-8
Hongdu L-15
Korea Aerospace T-50/A-50
Yak-130

TURBOPROP TRAINERS

Embraer EMB-314 Super Tucano Series
Fuji Heavy Industries T-5
Hawker Beechcraft T-6A/B
Korea Aerospace KT-1
Pilatus PC-21

PISTON TRAINERS

Alenia Aermacchi SF.260

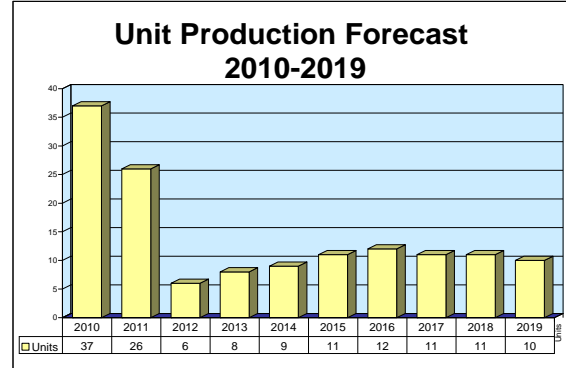
Projected military sales of light general aviation aircraft used by military customers in the primary training role are not included in this analysis. These types of piston trainers – the Cessna 172, for example – are produced at the same factories at which civilian aircraft are produced and are all 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

- Nearly 180 Super Tucanos had been sold as of mid-2010
- Further sales opportunities abound



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 2009, Embraer had produced two new-build Super Tucano prototypes, 32

Super Tucano production aircraft, and 77 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	http://www.hartzellprop.com , 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, UB9 5AJ Buckinghamshire, United Kingdom, Tel: + 44 1895 832214, Fax: + 44 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	36.53 ft
Length	11.38 m	37.33 ft
Height	3.97 m	13.01 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 .50-caliber machine gun is mounted in 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 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.

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 1996, Embraer selected the Israeli firm Elbit Systems to supply the mission avionics for the ALX. For this

contract, Elbit was chosen over 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, Egypt. Out of the original order of 120 aircraft, Egypt received 40 Tucanos, with the other 80 assembled for Iraq.

The first Egyptian-assembled Tucano was delivered in 1985. Egypt placed an order in 1989 for an additional 14 Tucanos.

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; the options were never exercised.

The Shorts-built S312 Tucano is powered by the upgraded AlliedSignal (Garrett) TPE331-12B turboprop, and is

Embraer EMB-314 Super Tucano

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 in 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 updated 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

First Dominican Deliveries – Embraer delivered two Super Tucano aircraft to the Dominican Republic in December 2009, the first of an order for eight aircraft. The Super Tucanos are to be operated by the Dominican Air Force on missions involving internal security, border patrol, and combating drug traffic.

"The use of the Super Tucano airplanes by the Dominican Air Force, beginning with these first two deliveries, will increase the readiness and solidity of the nation's defense system by performing patrol missions with the operational efficiency and precision that are already combat proven," said Orlando Jose Ferreira Neto, Embraer executive vice president for the defense market. (Embraer, 12/09)

Market Intelligence Service Subscribers: For additional news, go to the online E-Market Alert page located in the Intelligence Center at www.forecastinternational.com and click on the links to the products you subscribe to.

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
	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

Embraer EMB-314 Super Tucano

Worldwide Distribution/Inventories

The geographic distribution of Tucanos and Super Tucanos as of July 2010 is as follows:

Angola	11	EMB-312
Argentina	22	EMB-312
Brazil	124	EMB-312
	86	ALX
Chile	12	EMB-314
Colombia	14	EMB-312
	25	EMB-314
Dominican Republic	2	EMB-314
Ecuador	8	EMB-314
Egypt	54	EMB-312
France	20	EMB-312
Honduras	9	EMB-312
Iran	15	EMB-312
Kenya	11	EMB-312
Kuwait	16	EMB-312
Paraguay	3	EMB-312
Peru	18	EMB-312
United Kingdom	67	EMB-312
United States	1	EMB-314
Venezuela	21	EMB-312

Forecast Rationale

The Super Tucano has become a popular item in the past couple of years. As of June 2010, Embraer had accumulated orders for 178 Super Tucanos, of which 135 had been delivered. The order backlog at that time totaled 43 aircraft: 12 for Brazil, 16 for Ecuador, six for the Dominican Republic, and nine for a pair of undisclosed customers. Based on current production plans, these orders extend Super Tucano production well into 2011.

Deliveries of 12 Super Tucanos to the Chilean Air Force began in December 2009 and were completed in the first half of 2010. The service utilizes the Super Tucano as a basic trainer.

Embraer's Super Tucano order book includes 99 ALXs for the Brazilian Air Force. By mid-2010, Embraer had delivered 87 of the aircraft to the service.

Embraer delivered two Super Tucanos to the Dominican Republic in December 2009. The aircraft were the first of a Dominican order for eight of the type.

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 began in February 2010 and, by the middle of the year, eight Super Tucanos had been delivered to the service.

In June 2010, however, the Ecuadorian Defense Ministry announced plans for a reduction of six aircraft in the Air Force's Super Tucano order, reducing the total acquisition to only 18 aircraft. The resultant savings are intended to be used to acquire 12 secondhand fighter aircraft, deemed to be a high priority for the service.

Embraer EMB-314 Super Tucano

Worldwide Interest

Sales competitors to the Super Tucano on the world market include other turboprop-powered aircraft such as the Hawker Beechcraft T-6, the Korea Aerospace Industries (KAI) KT-1, and the Pilatus PC-21. The jet-powered Alenia Aermacchi M-311 trainer also provides some competition to the Embraer aircraft.

Although Super Tucano sales have so far been largely concentrated in Latin America, considerable interest in the aircraft has become evident in other regions of the world as well. Particularly promising regional markets for the type include Asia and Africa.

Embraer has engaged in discussions with at least five countries in the Asia/Pacific region regarding acquisition of the Super Tucano. The Indonesian Air Force intends to order eight Super Tucanos for use in the light attack role. However, this plan has not yet received approval from the Indonesian Defense Ministry, and the KT-1 remains a contender for the buy.

In January 2010, the Indian Defense Ministry issued a Request for Proposals (RFP) regarding an Indian Air Force acquisition of 75 basic trainers. The Super Tucano is one of the contenders for this contract, as are the KT-1, the T-6, the Pilatus PC-7 or PC-21, the Grob G 120TP, the EADS PZL Warszawa-Okecie PZL-130, and possibly others.

The 75-aircraft buy is part of a larger Air Force requirement for 181 basic trainers. The remaining 106 aircraft might be built under license by Hindustan Aeronautics Ltd (HAL).

Latin America also provides considerable opportunity for further Super Tucano sales. Indeed, the Brazilian Air Force itself has an emerging requirement to replace its EMB-312 Tucanos, and the Super Tucano would appear to be the ideal candidate for such a buy.

The Paraguayan Air Force intends to acquire six Super Tucanos, as does the Guatemalan Air Force. The Peruvian Air Force wants at least four Super Tucanos. 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.

Sales opportunities also exist in other parts of the world. The Super Tucano is a possible candidate for a Royal Australian Air Force requirement for up to 50 aircraft to replace 65 Pilatus PC-9/As from 2012.

The Super Tucano is also a 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 fleet of 67 Shorts Tucanos.

The Super Tucano is expected to vie with the AT-6 version of Hawker Beechcraft's T-6 for a contract to supply the Afghanistan National Army Air Corps with six to 20 light attack aircraft. The U.S. Air Force is conducting this competition.

Meanwhile, the USAF itself intends to request funding for 15 light attack aircraft in its FY12 budget request. The aircraft would be used to train and assist developing air forces of partner nations. The Super Tucano and the AT-6 are expected to compete for this acquisition as well.

Ten-Year Outlook

ESTIMATED CALENDAR YEAR UNIT PRODUCTION												
Designation or Program	High Confidence					Good Confidence			Speculative			Total
	Thru 2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	
Embraer - Empresa Brasileira de Aeronáutica SA												
ALX <> PT6 A -68												
	77	15	7	0	0	0	0	0	0	0	0	22
Super Tucano <> PT6 A -68												
Note: Does not include the proof-of-concept aircraft, which was a converted EMB-312.												
	34	22	19	6	8	9	11	12	11	11	10	119
Subtotal	111	37	26	6	8	9	11	12	11	11	10	141
Total	111	37	26	6	8	9	11	12	11	11	10	141

FORECAST INTERNATIONAL

ORDER FORM FOR PROPER SHIPPING, PLEASE PROVIDE ALL OF THE FOLLOWING INFORMATION.

Name _____ Title _____

Company _____

Street Address _____

City _____ State/Prov. _____ Country _____ Zip _____




Phone _____ Fax _____

E-Mail _____

Cardholder Name _____

Card# _____ Exp. _____ csc# _____

Billing Address (if different from above) _____

- Check Enclosed
- Bill Company
(Purchase Order # and Signature Required)
- Quotation Requested
- VISA  MasterCard 
- American Express 

Name of Product/Service	Code	E-Mail Address	Qty.	Price

Please include your e-mail address to receive twice-weekly E-Market Alert Newsletters.



Subtotal _____
 Shipping _____
 In Connecticut add 6% sales tax _____
 Grand Total _____

SHIPPING AND HANDLING RATES

	U.S.	World		U.S.	World		U.S.	World
Market Intelligence Services			Market Intelligence Libraries			Governments & Industries		
Binder	\$45	\$85	Complete Library			Binder	\$540	\$1,020
DVD	\$50	\$95	(Civil/Commercial & Military)			DVD	\$50	\$95
Binder & DVD	\$95	\$180	Binder	\$1,575	\$2,975	International Military Markets		
Binder & RT	\$45	\$85	DVD	\$50	\$95	(A Subset of G&I above)		
Worldwide Inventories			Military Market Library			Binder	\$270	\$510
Aerospace Systems			Binder	\$1,440	\$2,720	DVD	\$50	\$95
CD	\$50	\$95	DVD	\$50	\$95	Naval		
Weapons Systems			Civil/Commercial Library			Binder	\$90	\$170
Hard Copy	\$45	\$85	Binder	\$360	\$680	DVD	\$50	\$95
CD	\$50	\$95	DVD	\$50	\$95	Power		
Power Systems			Market Intelligence Group Libraries			Binder	\$90	\$170
Hard Copy	\$45	\$85	Aerospace			DVD	\$50	\$95
Focused Market Segment Analyses			Binder	\$360	\$680	Weapons		
Hard Copy	\$25	\$45	DVD	\$50	\$95	Binder	\$180	\$340
			Electronics			DVD	\$50	\$95
			Binder	\$360	\$680	<small>NOTE: No charge for Real-Time format.</small>		
			DVD	\$50	\$95	2011 Historic Art Calendar		
							\$5.95	\$12.95

NOTE: ORDERS CAN TAKE UP TO 5 BUSINESS DAYS TO SHIP.

WORLDWIDE SALES OFFICES

HEADQUARTERS USA

FORECAST INTERNATIONAL INC.

22 Commerce Road, Newtown, CT 06470 USA
Phone: 203.426.0800 Fax: 203.426.1964

SALES/CUSTOMER SERVICE/MARKETING

Phone: 203.270.0633 Worldwide
Toll-Free: 800.451.4975 U.S. & Canada
Fax: 203.426.0223

E-Mail: sales@forecast1.com

E-Mail: info@forecast1.com

E-Mail: customerservice@forecast1.com

PROPRIETARY RESEARCH & CONSULTING

Phone: 203.426.0299 Fax: 203.426.1964
E-Mail: consulting@forecast1.com

EDITORIAL

Phone: 203.270.0111 Fax: 203.426.4262

E-Mail: queries@forecast1.com

TECHNICAL SUPPORT

Phone: 203.270.0629 Fax: 203.426.0223

E-Mail: support@forecast1.com

WEBSITE ADDRESSES

www.forecastinternational.com

www.fiplatinum.com

HEADQUARTERS EUROPE

(INCLUDING RUSSIA)

HAWK ASSOCIATES LTD.

UNITED KINGDOM

Templehurst House
New Street, Chipping Norton
Oxon, OX7 5LJ, U.K.

Phone: (44) 1608 643281

Fax: (44) 1608 641159

E-Mail: support@hawkinformation.com

Website: www.hawkinformation.com

Contact: Mr. Michael Hobbs

HAWK ASSOCIATES LTD.

FRANCE

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

CHINA AND SOUTHEAST ASIA

CHINA NATIONAL PUBLICATIONS

I & E GROUP CORPORATION

PO Box 88
16 Gongti East Road
Chaoyang Beijing 100020 CHINA
Phone: (86) 10 6506 6688 ext. 8307
Fax: (86) 10 6586 6970
E-Mail: xiaoxiao0640@hotmail.com
Contact: Mr. Xiaoxiao Zhang

JAPAN

AVIATION RESEARCH INSTITUTE

1-427-2 Takano
Misato City Saitama Pref
Tokyo 341-0035 JAPAN
Phone: (81) 489 71 5040
Fax: (81) 489 55 7151
E-Mail: max@arijapan.com
Website: www.arijapan.com/forecast
Contact: Mr. Kenichi Oyama

REPUBLIC OF KOREA

PAMANONG TRADING COMPANY

275-2 Yangjae Dong
Seocho-Gu Seoul 137-722 KOREA
Phone: (82) 2 572 4349 or (82) 2 572 4371
Fax: (82) 2 572 4370
E-Mail: nhk@forecast1.com
Website: www.forecast1.co.kr
Contact: Ms. Nam Hee Kim

TERMS AND CONDITIONS

DISCOUNT PRICING

Discount Pricing – Codes prefaced by CH, RH, Z, P or RTPS, and multi-user subscriptions, include a discount that is reflected in the marketed cost.

BOOKSELLER DISCOUNTS

For information, call 203.270.0633 or 800.451.4975 (Toll-Free U.S. & Canada).
E Mail: info@forecast1.com.

NEW CLIENTS

Payment in full is required with the initial order.

TERMS

Net 30 days. For overdue accounts we reserve the right to assess interest of 12% annually, and add collection fees.

PURCHASE ORDER

If company requires, please submit a purchase order to ensure timely delivery.

RETURNS OR REFUNDS

Due to the nature of our products, no returns are accepted and no refunds are provided.

FORMS OF PAYMENT

We accept VISA, MasterCard, American Express, or a company check drawn on a U.S. bank in U.S. dollars. Wire Transfer Details: Contact customerservice@forecast1.com or call 203.270.0633.

Please ensure bank charges are not deducted from the total amount due. Note: Include the quotation or invoice number with your payment.

DATA USAGE

Photocopy/Copyright Permission: Forecast International observes all Copyright laws. Reproduction and distribution of any product is prohibited by law. To obtain a release, please call 203.270.0633 or contact customerservice@forecast1.com.

ELECTRONIC DATA LICENSING

All products provided on DVD or CD, or in Real-Time, are sold and licensed for single-site, single-user applications. Multi-site, multi-user licensing is available. Call 203.270.0633 or contact sales@forecast1.com to discuss your requirements.