

The Market for Light Commercial Rotorcraft

Product Code #F604

A Special Focused Market Segment Analysis by:



Analysis 3

The Market for Light Commercial Rotorcraft 2010-2019

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PROGRAMS

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

AgustaWestland AW109
AgustaWestland AW119
AgustaWestland AW139/149
Bell 206
Bell 407
Bell 429
Bell MAPL
Bell UH-1/412
Enstrom 480/TH-28
Enstrom F-28/280
Eurocopter AS 350/550/EC 130
Eurocopter AS 355/555
Eurocopter AS 365/565/EC 155
Eurocopter EC 120
Eurocopter EC 135/EC 635
Eurocopter EC 175
Eurocopter/Kawasaki BK 117/EC 145
HAL Dhruv Advanced Light Helicopter (ALH)
Harbin Z-9
Kamov Ka-226
Kazan Ansat
MD Helicopters 500/H-6 Series
MD Helicopters MD600N
MD Helicopters MD900/902 Explorer
Mil Mi-34
Robinson R22/44
Robinson R66
Schweizer S-300
Schweizer S-333
Sikorsky S-76
Light Helicopter Design, Development, and Inactive Programs

Introduction

For the purpose of this analysis, Forecast International defines the light commercial rotorcraft market segment as including those rotorcraft that fall roughly under 6,804 kilograms (15,000 lb) in maximum gross weight. Rotorcraft with maximum gross weights above this line are covered in a separate analysis of medium/heavy commercial rotorcraft in this volume.

As part of its coverage of the rotorcraft market, FI prepares individual forecasts and reports on light helicopters produced by major manufacturers. We do not cover experimental models or those having no expected production during the forecast period. For the 2010-2019 forecast period, we have included forecasts for the following civil market rotorcraft (any military versions of these aircraft are covered in a separate military analysis):

Turbine-Powered

AgustaWestland AW109
 AgustaWestland AW119
 AgustaWestland AW139
 Bell 412
 Bell 206 Jet Ranger/LongRanger Series
 Bell 407
 Bell 429
 Bell MAPL Series
 Enstrom 480
 Eurocopter AS 350/EC 130/HB 350
 Eurocopter AS 355
 Eurocopter AS 365/EC 155
 Eurocopter EC 120
 Eurocopter EC 135

Eurocopter EC 145/Kawasaki BK 117
 Eurocopter Harbin/Harbin EC 175/Z15
 Harbin Aircraft H410A/H425
 Harbin Aircraft Z-9
 HAL Dhruv
 Kamov Ka-226
 Kawasaki BK 117C-2 (under license)
 Kazan Helicopters Ansat
 MD Helicopters MD600N
 MD Helicopters MD900/902 Explorer
 MD Helicopters 500 Series
 PZL Swidnik W-3 Sokol
 PZL Swidnik SW-4
 Robinson R66
 Schweizer S-333/S-434
 Sikorsky S-76C++/D

Piston-Powered

Helicopteres Guimbal Cabri G2
 Enstrom F-28/280FX
 Mil Mi-34
 Robinson R22/44
 Schweizer S-300C

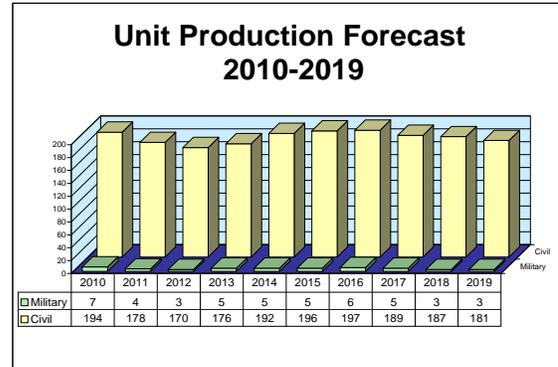
Many factors are considered for the individual forecast and market projections. Commercial demand is analyzed by market segment, i.e., emergency medical services (EMS), resource development, and law enforcement. We also consider the existing fleet, its age and performance characteristics, economic growth, and demographics. Finally, individual aircraft production forecasts are based on competitive technical and financial analyses.

* * *

Eurocopter AS 350/550/EC 130

Outlook

- Orders declined dramatically in 2009 for Ecureuil/Fennec series helicopters
- The AS 550C3 is a prime contender for the Indian military's revived light utility helicopter acquisition



Orientation

Description. Single-turboshaft-powered commercial and military utility helicopter.

Sponsor. The AS 350 Ecureuil was sponsored by Aerospatiale.

Status. Production of AS 350B2, AS 350B3, AS 550, and EC 130.

Total Produced. Through 2009, approximately 3,828 AS 350/550/EC 130s had been produced, including helicopters assembled in Brazil by Eurocopter subsidiary Helicopteros do Brasil SA (Helibras).

Application. Short-range scheduled and non-scheduled passenger transportation, border patrol, maritime patrol, corporate service, forestry and resource development, and pollution control; military missions include forward observation, artillery spotting, target acquisition, light ground attack, light anti-shipping, naval search-and-rescue, and pilot training.

Price Range. AS 350B2, \$2.323 million; AS 350B3, \$2.777 million; EC 130B4, \$3.08 million. All are estimates in 2010 U.S. dollars.

Contractors

Prime

Eurocopter	http://www.eurocopter.com , Aeroport Int'l Marseille Provence, Marignane, 13725 France, Tel: + 33 4 42 85 85 85, Fax: + 33 4 42 85 85 00, Prime
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Subcontractor

Turbomeca SA	http://www.turbomeca.com , Bordes, 64511 France, Tel: + 33 5 59 12 50 00, Fax: + 33 5 59 53 15 12 (Arriel Turboshaft)
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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

Eurocopter AS 350/550/EC 130

AS 350B3

Source: Eurocopter

Technical Data

(AS 350B3)

	<u>Metric</u>	<u>U.S.</u>
Dimensions		
Length overall, rotors turning	12.94 m	42.45 ft
Fuselage length	10.93 m	35.86 ft
Height overall	3.14 m	10.30 ft
Main rotor diameter	10.69 m	36.07 ft
Main rotor blade chord	350 mm	13.78 in
Tail rotor diameter	1.86 m	6.10 ft
Tail rotor blade chord	205 mm	8.07 in
Weight		
Weight empty	1,232 kg	2,716 lb
Maximum takeoff weight	2,250 kg	4,960 lb
Maximal sling load	1,400 kg	3,086 lb
Capacities		
Baggage volume	1.0 cu m	35.30 cu ft
Performance		
Maximum speed (at maximum gross weight)	287 km/h	155 kt
Fast cruise speed (at maximum gross weight)	258 km/h	140 kt
Range with maximum fuel, no reserves	652 km	352 nm

Eurocopter AS 350/550/EC 130

Propulsion

AS 350BA	(1)	Turbomeca Arriel 1B single-spool, axial-plus-centrifugal turboshaft engine rated 478 kW (641 shp).
AS 350B2	(1)	Turbomeca Arriel 1D1 turboshaft engine rated 546 kW (732 shp).
AS 350B3	(1)	Turbomeca Arriel 2B turboshaft engine rated 632 kW (847 shp), or Turbomeca Arriel 2B1 turboshaft engine rated 632 kW (847 shp).
AS 550C3	(1)	Turbomeca Arriel 2B turboshaft engine rated 632 kW (847 shp).
EC 130B4	(1)	Turbomeca Arriel 2B1 turboshaft engine rated 632 kW (847 shp).

Seating (AS 350)

Standard seating for six (seven seats maximum).

Armament (AS 550)

Provision for wide range of weapons, including 20mm Giat gun, 7.62mm machine gun pods, launchers for 68mm or 6.985-centimeter (2.75-in) rockets, and HELITOW anti-tank missile system.

Variants/Upgrades

AS 350C/D AStar. These versions were marketed to North American customers only and were powered by Textron Lycoming LTS 101-600 turboshaft engines.

AS 350B Ecureuil. AS 350 version powered by the Arriel 1B engine. In 1991, Eurocopter received French certification for the AS 350BA Ecureuil Plus variant. The BA was powered by a Turbomeca Arriel 1B engine rated at 478 kW (641 shp) and had a maximum takeoff weight of 2,100 kilograms (4,630 lb).

AS 350B1/B2 Ecureuil. Two "hot and high" derivatives, the first was powered by the Arriel 1D engine, and the second, introduced in 1989, is equipped with the 732-shp Arriel 1D1. The B1 had an uprated transmission, with a gearbox rated at 440 kW (590 shp). It featured wide-chord, new section main and tail rotor blades originally developed for Aerospatiale's Ecureuil 2/TwinStar twin-engine model. It became available in late 1986. The B1 provided a 500-pound increase in maximum TOW.

The B2 provides improved performance compared with the B1, including increased speed. The civil B2 weighs in at 2,250 kilograms (4,960 lb) maximum takeoff weight. The B2 was named the SuperStar by Aerospatiale.

AS 550U/A/C/M/S1 Fennec. All military-configured AS 350s carry the designation AS 550. Eurocopter used capital letters to differentiate between individual versions. The letters were U for utility, A for armed, C for missile-armed, M for unarmed naval, and S for armed naval. The military model first flew in 1985 and had a taller landing gear, sliding doors, an extended instrument panel, and airframe reinforcements for the mounting of armament.

AS 550U/A/C/M/S2 Fennec. Improved version of the AS 550 with an uprated Turbomeca Arriel 1D1 turboshaft.

AS 350B3. New derivative that incorporates an increased-chord tail rotor from the AS 355N Twin Ecureuil, new avionics, the Arriel 2B or 2B1 powerplant, and a new interior. It can sling-lift loads up to 1,400 kilograms (3,086 lb).

The AS 350B3 was awarded VFR certification by the French civil aviation authority, the DGAC, in December 1997. The first production AS 350B3 was delivered in January 1998 to Osterman Helicopter AB of Sweden.

AS 355/555 Twin Ecureuil/Twin Fennec. Twin-engine derivative announced in January 1979. Not covered in this report. (There is a separate Forecast International report on the AS 355/555.)

EC 130B4. In February 2001, Eurocopter launched a new version of the Ecureuil called the EC 130B4. This new model is designed mainly for the air taxi market. It was developed to comply with new helicopter noise regulations, particularly the U.S. "Grand Canyon" standard. The EC 130B4 provides 23 percent more cabin space than earlier AS 350s. It can be configured for eight seats in a medium-density configuration.

The EC 130B4 incorporates components from Eurocopter's EC 120B, including the windshield and doors. It has a shrouded Fenestron tail rotor identical to that of the EC 135. The EC 130B4 is powered by the 847-shp Arriel 2B1 engine.

The initial EC 130 made its first flight in June 1999. U.S. FAA and European JAA certification were awarded in December 2000. The initial delivery of an EC 130 occurred in February 2001 to Blue Hawaiian Helicopters.

Eurocopter AS 350/550/EC 130

Program Review

Background. Aerospatiale Helicopter Division (later merged into Eurocopter) launched the AS 350 program in 1973, and flew prototype AS 350C and AS 350B models in 1974 and 1975, respectively. The B and C received French and U.S. certification late in 1977. Deliveries began in early 1978. In August of that year, the AS 350C was replaced by the updated AS 350D derivative, which incorporated a redesigned Starflex rotor head constructed of fiberglass with elastomeric spherical stops and oleo-elastic frequency matchers.

Two Markets

Market Differentiation. The French manufacturer originally sold two versions of the same helicopter for two distinct markets. The LTS 101-powered AStar was designed specifically for North America, and the Arriel-powered Ecureuil (Squirrel) was marketed in all other geographical areas. Aerospatiale Helicopter Corp, now known as American Eurocopter, began marketing the Lycoming-powered AS 350C AStar in late 1977, but switched to the AS 350D AStar when that model became available in August 1978. The Arriel-powered AS 350B2 and AS 350B3 models, however, are now sold in the North American market.

AStar Engine Retrofit. The LTS 101-powered helicopter became the victim of that engine's troubles in other airframes, most notably the Bell 222. Marketing of the AStar became ever more difficult as the reputation of the Textron Lycoming product soured. Sales declined, and the Arriel-powered versions are now sold in North America. Several hundred LTS 101-powered AStars remained in North American service.

To protect customers and forestall a major sell-off of those assets, Turbomeca (with the approval of Aerospatiale) launched an Arriel re-engining program for LTS 101-powered AS 350C/D models operating in North America. The program was launched in 1985. Turbomeca booked orders for over 100 engine retrofits.

Brazilian Assembly. In February 1978, Aerospatiale concluded an agreement with Brazil's Industrial Development Council providing for the licensed assembly of 200 HB 350B (AS 350B) Esquilo and 30 SA 315B Lama helicopters. A new company, Helicopteros do Brasil SA (Helibras), was established in 1977 to handle this program, with Aerospatiale initially holding a 45 percent share. In March 1980, Helibras inaugurated a new facility for the production of HB 350B Esquilo and SA 315 Lama helicopters.

Eurocopter has since increased its shareholding in Helibras to 85.65 percent.

DHFS. In 1996, the British Ministry of Defence selected the company FBS to supply 47 helicopters (38 AS 350s and nine Bell 412s) and personnel for the newly established Defence Helicopter Flying School (DHFS). FBS is a joint venture of FR Aviation, Bristow Helicopters, and Serco. The DHFS provides instruction to British Army, Royal Navy, and Royal Air Force helicopter pilots. FBS signed a contract with Eurocopter for the 38 AS 350s. Deliveries began in November 1996 and have since been completed.

The AS 350s delivered to FBS are called AS 350BBs. The AS 350BB is a version of the AS 350B2 and is powered by the Arriel 1D1 engine.

Related News

CBP to Add Six More AS 350B3s – In February 2010, U.S. Customs and Border Protection (CBP) entered into the first option year on the Light Enforcement Helicopter (LEH) contract and placed an order for six AS 350B3s. This order is the second on the LEH contract, which had been awarded to American Eurocopter by the U.S. Department of Homeland Security in 2008.

"The AS 350B3 has proven that it is well-suited for the CBP's surveillance missions and security patrol," said Marc Paganini, American Eurocopter president and CEO. "It provides a cost-effective, durable, and high-performance solution to meet their varied mission objectives."

The LEH contract is a multiyear contract and could ultimately result in orders for a total of 50 AS 350B3s. To date, 14 AS 350B3s have been delivered. The helicopters are produced at American Eurocopter's facilities in Columbus, Mississippi.

CBP has more than 270 aircraft in its fleet, including 53 AS 350s. (Eurocopter, 2/10).

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Eurocopter AS 350/550/EC 130

Timetable

<u>Month</u>	<u>Year</u>	<u>Major Development</u>
Mar	1973	AS 350 program launched
Jun	1974	AS 350C prototype flown
Feb	1975	AS 350B prototype flown
Oct	1977	AS 350B obtains French certification
Dec	1977	AS 350C obtains FAA certification
Early	1978	Initial deliveries
Jul	1978	Updated AS 350D certified by FAA
Aug	1978	AS 350C dropped; AS 350D deliveries begin
Early	1980	Initial Helibras-assembled units delivered
Early	1985	AS 350D Mk III initial deliveries
	1985	AS 550L1 first flight
Apr	1989	AS 350B2 certificated
	1991	French VFR certification of AS 350BA
Jun	1995	AS 350B3 introduced at Paris Air Show
Dec	1997	French VFR certification of AS 350B3
Jan	1998	Initial delivery of AS 350B3
Beyond	2010	Production to continue

Worldwide Distribution/Inventories

Military/Government Operators

(As of June 2010)

Operator	Designation	Quantity
Argentina Police	HB 350	2
Australia Army	AS 350B	18
Australia Government	AS 350B	1
Australia Navy	AS 350B	6
Benin Air Force	AS 350	1
Bolivia Air Force	AS 350B3	2
Botswana Air Force	AS 350B	9
Brazil Air Force	HB 350B	25
Brazil Army	AS 550A2	20
Brazil Army	HB 350-1	16
Brazil Navy	HB 350B	17
Burkina Faso Air Force	AS 350	1
Cambodia Government	AS 350B	2
Canada Police	AS 350B3	4
Central African Republic Air Force	AS 350B	1
Chad Air Force	AS 550	6
Chile Army	AS 350	3
Comoros Air Force	AS 350B	1
Denmark Army	AS 550	12

Eurocopter AS 350/550/EC 130

Operator	Designation	Quantity
Ecuador Army	AS 350B	2
France Securite Civile	AS 350B2	4
France Police	AS 350B	22
France Police	AS 350B1	4
France Police	AS 350BA	5
France Police	AS 550U2	1
Gabon Air Force	AS 350B	2
Guinea Air Force	AS 350	1
Iceland Coast Guard	AS 350B	1
Jordan Air Force	AS 350B	3
Malawi Air Force	AS 350	2
Mali Air Force	AS 350	1
Netherlands Police	AS 350B	2
Ontario Ministry of Natural Resources (Canada)	AS 350B2	2
Ontario Ministry of Natural Resources (Canada)	EC 130B4	4
Pakistan Army	AS 350B3	11
Paraguay Air Force	HB 350B	3
Paraguay Navy	HB 350B	2
South Africa Government	AS 350B	2
South Africa Police Service	AS 350	6
Thailand Government	AS 350B	11
Tunisia Air Force	AS 350	6
United Arab Emirates Air Force	AS 550C3	6
United States Customs and Border Protection	AS 350B2	39
United States Customs and Border Protection	AS 350B3	14

Forecast Rationale

Eurocopter recorded 103 orders for Ecureuil/Fennec series helicopters in 2009, a total that includes both single-engine and twin-engine models. The weak civil helicopter market severely impacted sales during the year, as the 103 orders represented a dramatic decrease of almost 70 percent from the 2008 order total of 340.

Prior to the large sales drop-off in 2009, order rates for the AS 350/550 series had been growing substantially since 2003. With recovery (however sluggish) already under way in the civil rotorcraft market, as well as in the general economy, series sales will rebound.

Single-engine Ecureuil/Fennec models currently in production include the AS 350B2, AS 350B3, and

EC 130B4 civil helicopters and the AS 550C3 military variant. These helicopters face a crowded field of competitors in the light single turbine market, contending against such helicopters as the AgustaWestland AW119, the Bell 206 and 407, the MD Helicopters MD 500 series and MD 600N, and the new Robinson R66.

This competition is formidable, and the new Robinson entrant could prove to be particularly potent, at least at the lower end of the market segment. However, the AS 350 has several features that have helped make this helicopter a quite popular item. Among these are good handling characteristics, low noise and vibration levels,

Eurocopter AS 350/550/EC 130

a roomy cabin, rugged airframe construction, and, perhaps above all, versatility and flexibility in mission adaptation. The AS 350 can be deployed in a wide variety of missions, ranging from the transport of high level business executives, to utility missions such as construction work, to specialized duties such as firefighting.

The AS 350B3 version is especially notable in this regard due to its high performance capabilities. The B3 even achieves a significant level of sales in Europe, unusual for a single-engine helicopter as European operating regulations can make the operation of singles problematic.

Eurocopter assembles most AS 350s in France, though a number are assembled each year at an American Eurocopter plant in Mississippi. In addition, Eurocopter subsidiary Helibras assembles AS 350s in Brazil under the HB 350 designation.

The EC 130B4 is the newest single-engine model in the Ecureuil series. More than 330 EC 130s have been delivered to date. Compared to the AS 350 models, the EC 130 is quieter, has 23 percent more cabin space, and can fit one or two more passengers. The external noise generated by the EC 130 is 8.5 decibels below the International Civil Aviation Organization (ICAO) standard.

Indeed, the expanded cabin space and low noise of the EC 130 have led to this model finding much of its sales success in the air tourism market. Eurocopter, in fact, designed the EC 130 to be compliant with the stringent noise regulations around U.S. national parks. The largest EC 130 fleet in the world is owned by Nevada-based air tour operator Maverick Helicopters. Maverick flies more than 30 EC 130s on sightseeing tours of the Grand Canyon, Las Vegas, and the Phoenix/Scottsdale area, as well as in charter operations.

The EC 130 is not restricted to sightseeing work, however. The helicopter is also utilized by operators in such roles as corporate transport, law enforcement, EMS, and utility work. The Ministry of Natural Resources of the Canadian province of Ontario has a fleet of four EC 130s that is used for forest fire

management and various utility duties. Three more EC 130s are being acquired to add to this fleet.

Military Market

The sole dedicated military single-engine model in the Ecureuil/Fennec series currently in production is the AS 550C3 Fennec. In 2008, deliveries were completed of six AS 550C3s to the UAE Air Force.

Ten AS 550C3s are on order for the Pakistani Army. Eurocopter has so far completed at least two of these helicopters. As of mid-2010, though, deliveries had yet to begin to the Army, as changes are being made to the helicopters' equipment fit.

In 2007, the Indian Defence Ministry canceled a planned procurement of 197 AS 550C3 utility helicopters for the Indian Army, citing alleged discrepancies in the bid and evaluation process. The AS 550C3 had been selected for the award over the Bell 407.

In July 2008, a new Request for Proposals (RFP) was issued for the Indian program. The procurement quantity has remained at 197 helicopters, though 64 of these are now slated for the Indian Air Force, with the other 133 slated for the Army. The first 60 helicopters are to be delivered in flyaway condition by the selected manufacturer, while the remaining 137 are to be built under license by Hindustan Aeronautics Ltd (HAL).

Eurocopter has again bid the AS 550C3 for the renewed Indian acquisition, and is competing for the award against the AgustaWestland AW119 and the Kamov Ka-226. Bell chose not to compete this time around.

The AS 550C3 has to be seen as at least a slight favorite to win the Indian contract. However, the contest is a close enough call that we are not specifically forecasting the helicopter as the winner. Our AS 550 forecast does not include production of the helicopter for the Indian program.

Note: *Historical production data (through 2009) in the chart does not include models that are out of production. Production of these superseded models totaled 1,272 AS 350s and 188 AS 550s.*

Eurocopter AS 350/550/EC 130

Ten-Year Outlook

ESTIMATED CALENDAR YEAR CIVIL UNIT PRODUCTION												
Designation or Program	High Confidence					Good Confidence			Speculative			Total
	Thru 2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	
Eurocopter												
AS 350 B2 Civil <> Arriel 1D1												
	851	65	60	50	52	53	54	52	50	49	47	532
AS 350 B3 Civil <> Arriel 2B/2B1												
	845	80	77	80	82	91	93	96	97	98	98	892
EC 130 B4 Civil <> Arriel 2B1												
	335	44	37	37	38	44	45	45	38	37	34	399
Subtotal	2,031	189	174	167	172	188	192	193	185	184	179	1,823
Helibras												
HB 350 Civil <> Arriel 1B/1D1												
	200	5	4	3	4	4	4	4	4	3	2	37
Total	2,231	194	178	170	176	192	196	197	189	187	181	1,860
ESTIMATED CALENDAR YEAR MILITARY UNIT PRODUCTION												
Designation or Program	High Confidence					Good Confidence			Speculative			Total
	Thru 2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	
Eurocopter												
AS 550 C3 Military <> Arriel 2B												
	8	5	3	2	3	3	3	4	3	2	2	30
Helibras												
HB 350/HB 550 Military <> Arriel 1B/1D1												
	129	2	1	1	2	2	2	2	2	1	1	16
Total	137	7	4	3	5	5	5	6	5	3	3	46

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			Binder	\$360	\$680	<small>NOTE: No charge for Real-Time format.</small>		
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