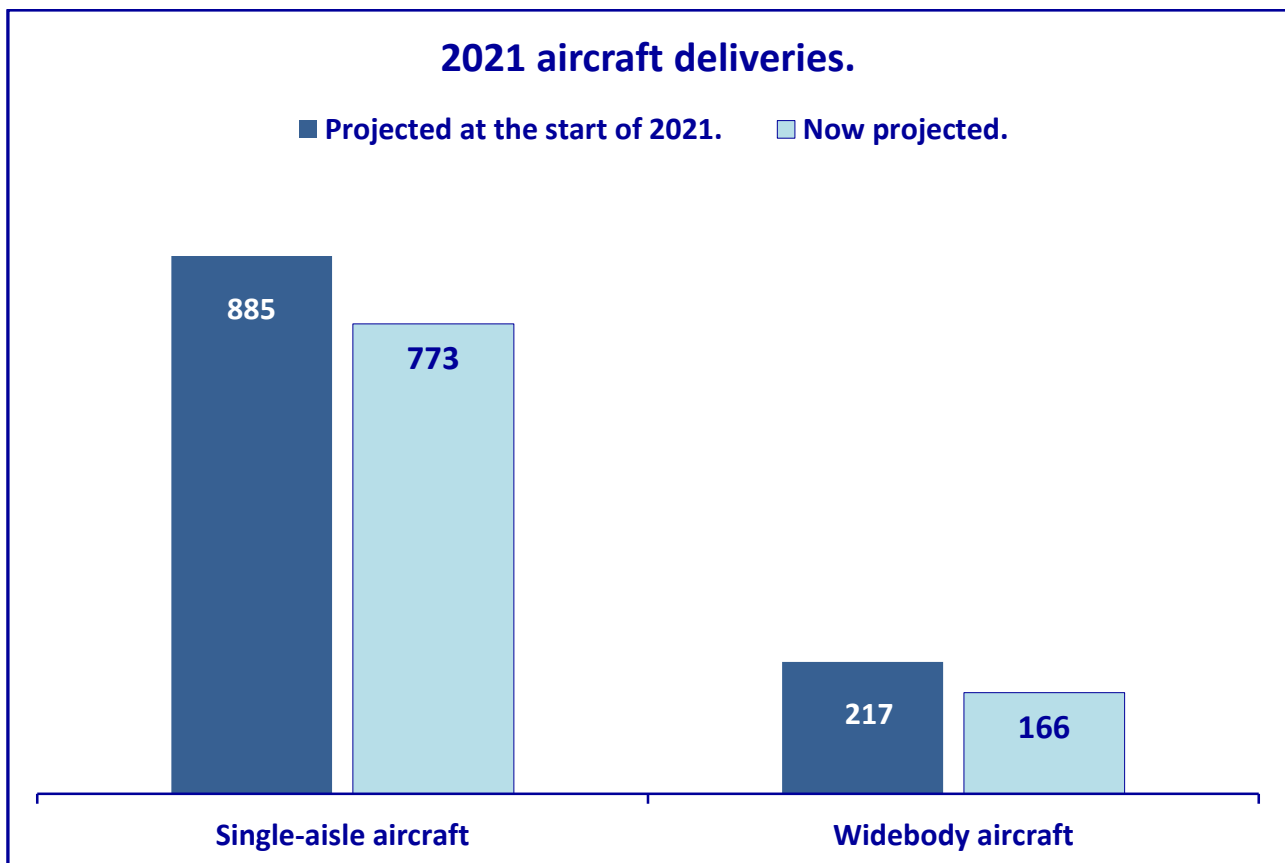


Aerospace Market News

September 2021

There are likely to be far fewer aircraft deliveries this year than originally projected.



At the start of this year the manufacturers' projections and guidelines pointed to about 1,100 large commercial jet aircraft deliveries. To achieve this now would mean over 500 deliveries in the last four months of this year, i.e. a massive hike in monthly delivery numbers. A more probable year-end total is about 939 aircraft deliveries which is over 200 more than in 2020.

See pages 6 and 30.

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Industry Overview : 6

There will be fewer deliveries than originally expected this year.

At the start of this year the manufacturers' projections and guidelines suggested just over 1,100 aircraft deliveries by the end of 2021. There have been 590 so far. To reach that 1,100 figure means 510 deliveries in the last four months of this year which is unrealistic. A more probable year-end total is for about 939 aircraft deliveries.

The Large Commercial Jet Aircraft Backlog : 7

The backlog went up by 60 aircraft in August.

The backlog went up in August, for the second time this year. Airbus and Boeing both had gains and for Airbus it was the first backlog increase since January last year. The European manufacturer does still have fewer aircraft on backlog than at the start of this year but with a current share of nearly 54% of the total backlog, a smaller backlog is not really an issue. Boeing has a larger backlog than at the start of the year but the company's gain in August amounted to just one aircraft.

Single-aisle and Widebody Aircraft Backlogs. 13

Orders for Large Commercial Jets : 19

Airbus just had the best month since January last year.

There were orders for 155 aircraft in August, not an especially large number but the third largest monthly intake this year and the largest for the month of August since 2016. Two things stand out about this intake however. One is that the Airbus intake of 102 aircraft was the largest for a single month since January last year and the other is that a number of customers, rather than just a few, placed the orders.

Deliveries of Large Commercial Jets : 24

There have been fewer widebody deliveries than at this time last year.

So far this year there have been 493 single-aisle and 97 widebody deliveries. The single-aisle total is 230 aircraft larger than by the end of August last year but the widebody total is 11 fewer. Airbus has so far delivered 384 new aircraft, 100 more than by the end of August last year and Boeing has delivered 206 aircraft this year, 119 more than at the same time last year. Boeing's numbers have been boosted by 141 737 MAX deliveries – there were none by the end August last year.

Deliveries – the change from Jan-July last year. 27

Current Production Rates : 30

Aircraft Engines : 32

There have now been 446 more engine installs than by the end of August last year.

The August install total of 124 engines was lower than expected but it did take the total number of installs this year to over 440 more than by the end of August last year. There have now been 460 more single-aisle engine installs but 14 fewer widebody engine installs. All the single-aisle engine programs have had more installs this year but three widebody engine programs have had fewer.

The Firm Jet Engine Order Book. 34

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