

## FBO Statistics

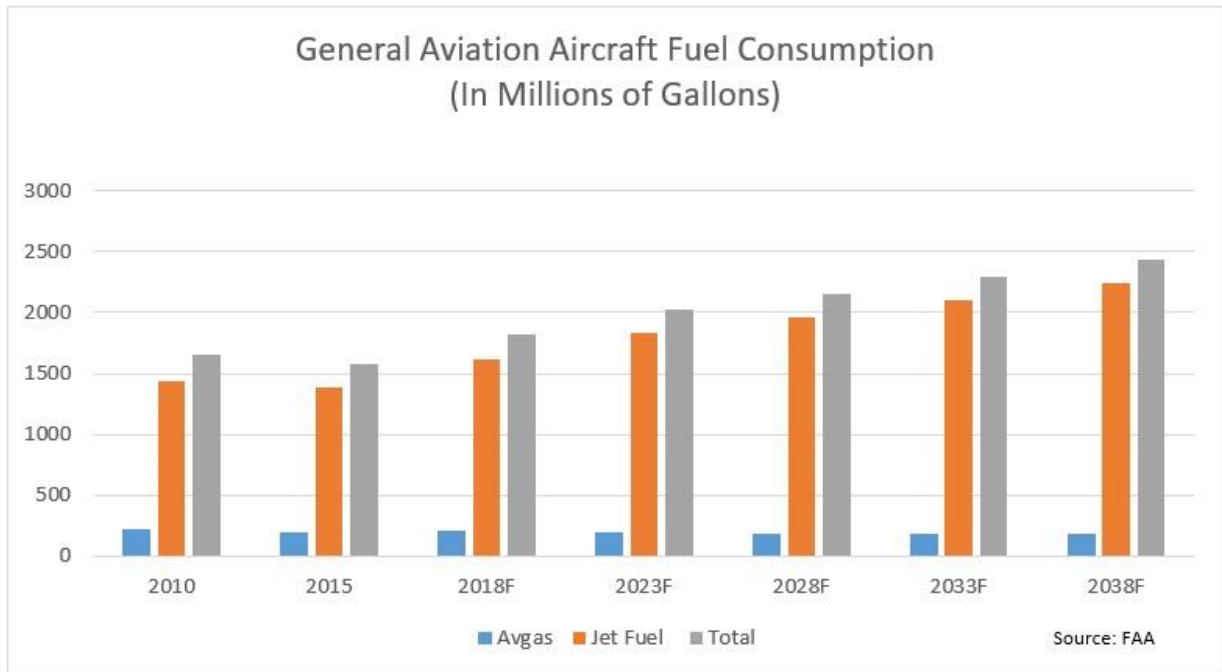
- 75% of public-use airports with a 3000' or greater paved runway have one FBO
- There are 3,534 public-use airports with a 3000' or greater paved runway, featuring 3,384 FBOs.
  - 789 of these FBOs only provide Avgas, 2,595 provide Avgas and Jet.
- There are 1,313 public-use airports with less than a 3000' paved runway.
  - Approximately 75% of these airports do not have any fuel and those remaining will primarily have Avgas only.

Data Source: Aviation Management Consulting Group (AMCG)



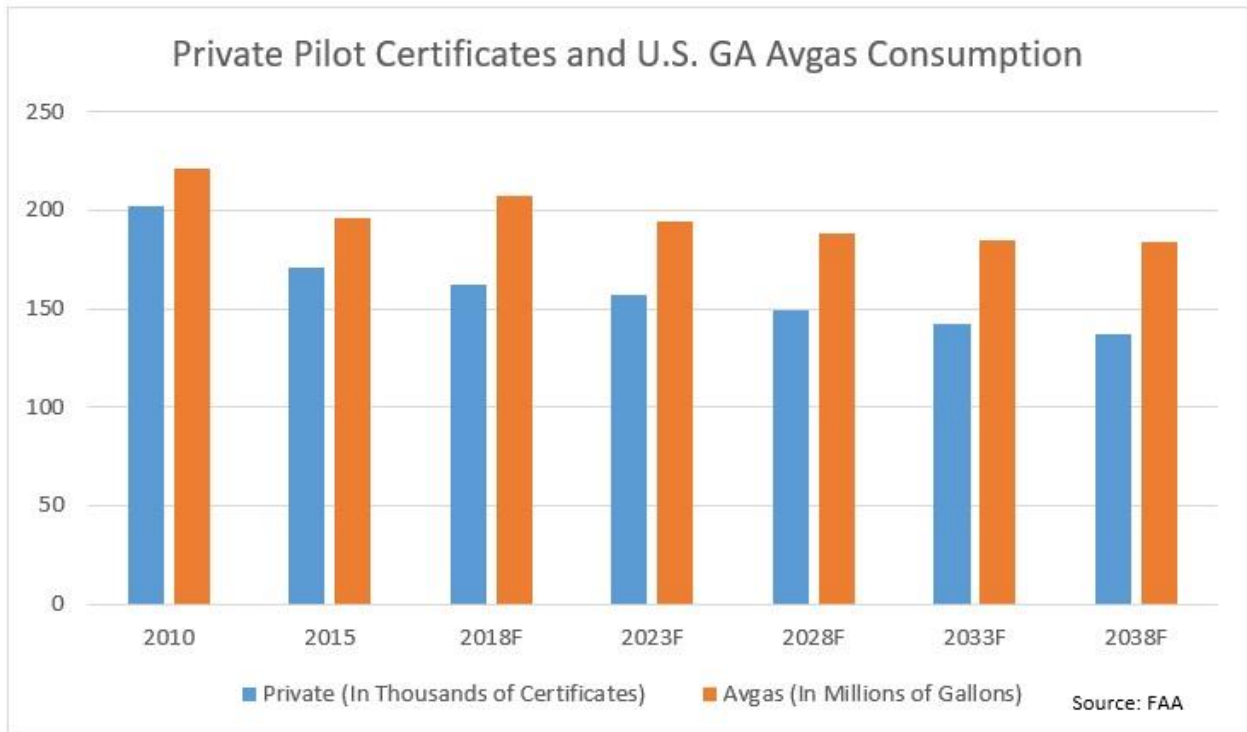
## Contemporary FBO Market in Relation to FBO Locations

- There are 3,537 public-use airports with a 3000' or greater paved runway featuring 3,384 FBOs, an increase of 2.5% between 1995 and 2015
- 75% of public-use airports with a 3000' or greater paved runway have one FBO
- Approximately 81.75% of those airports have one or two FBOs, compared to 80.75% of airports in 2010, 81.25% in 2005, 82% in 2000, and 81.25% in 1995
- This is a remarkably stable number given the changes we have seen in the general aviation industry during that same time



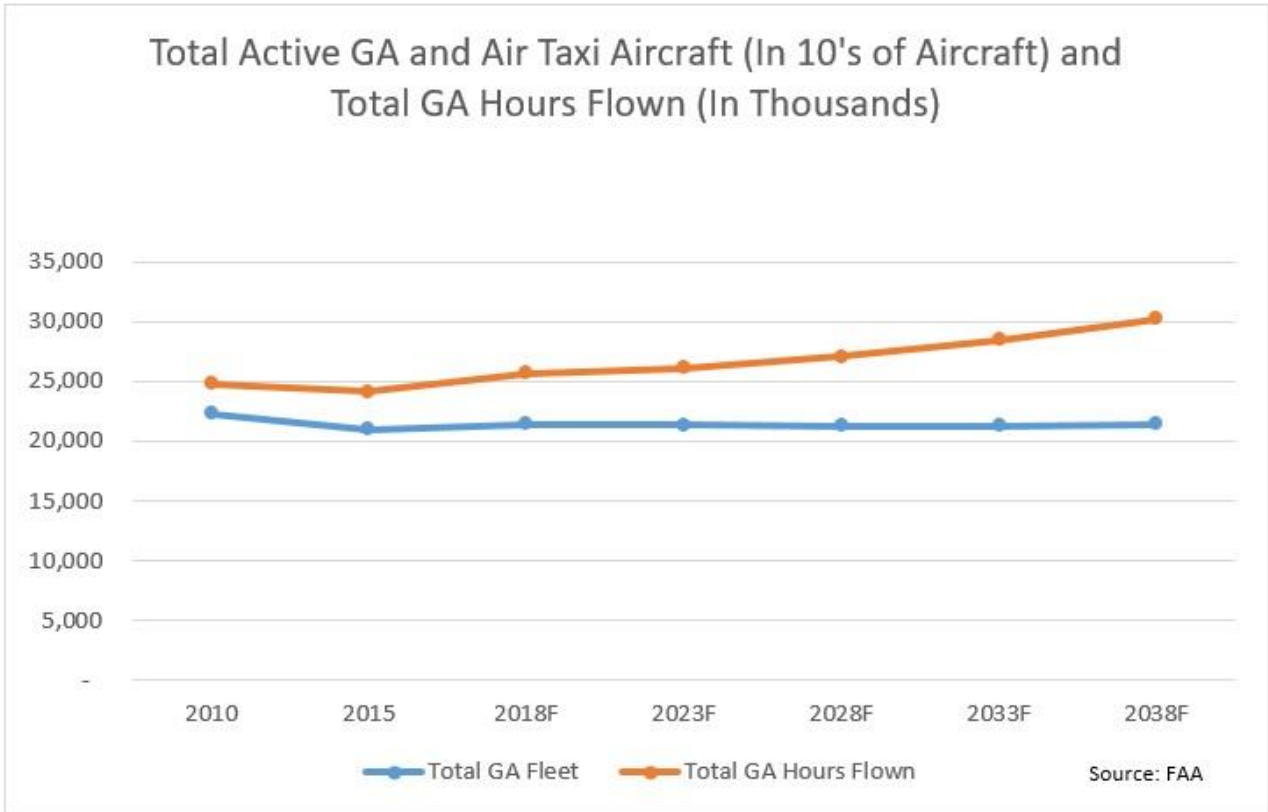
### General Aviation Aircraft Fuel Consumption from 2010 to the forecasted consumption of avgas in 2038

- Derived from the *FAA APO Estimates*.
- The forecasted consumption of avgas is projected to decrease by 0.6% each year from 2018-2038 versus the projected growth per annum of 1.7% for jet fuel and a projected growth per annum of 1.4% for total fuel consumed.
  - The data includes:
    - Fixed wing piston single engine and fixed wing piston multi-engine
    - Fixed wing turbine turbo-prop and fixed wing turbine turbo-jet
    - Rotorcraft piston and rotorcraft turbine
    - Experimental/other
    - Light Sport



### Trend of Private Pilot Certificates and U.S. General Aviation Avgas Consumption

- Derived from *FAA data*
- The forecasted number of private pilot certificates is projected to decrease by 0.9% each year from 2018-2038 versus the projected decline per annum of 0.6% for avgas



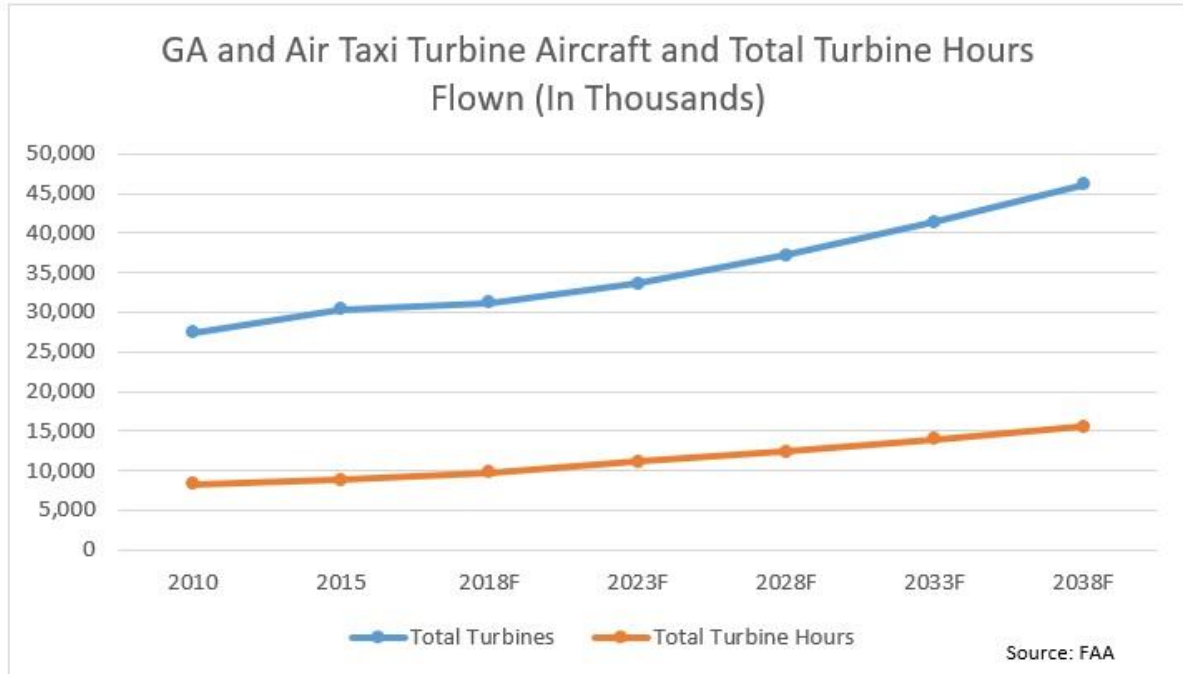
### GA Fleet and Hours Flown

- Source: 2001-2010, 2012-2016, FAA General Aviation and Air Taxi Activity (and Avionics) Surveys.
- Note: An active aircraft is one that has a current registration and was flown at least one hour during the calendar year.
- The forecasted total general aviation fleet is projected to be 0.0% each year from 2018-2038 versus the projected increase per annum of 0.8% for total general aviation hours.
- This graph illustrates the GA fleet size is forecasted to track stagnant while the total GA hours is forecasted for higher utilization.



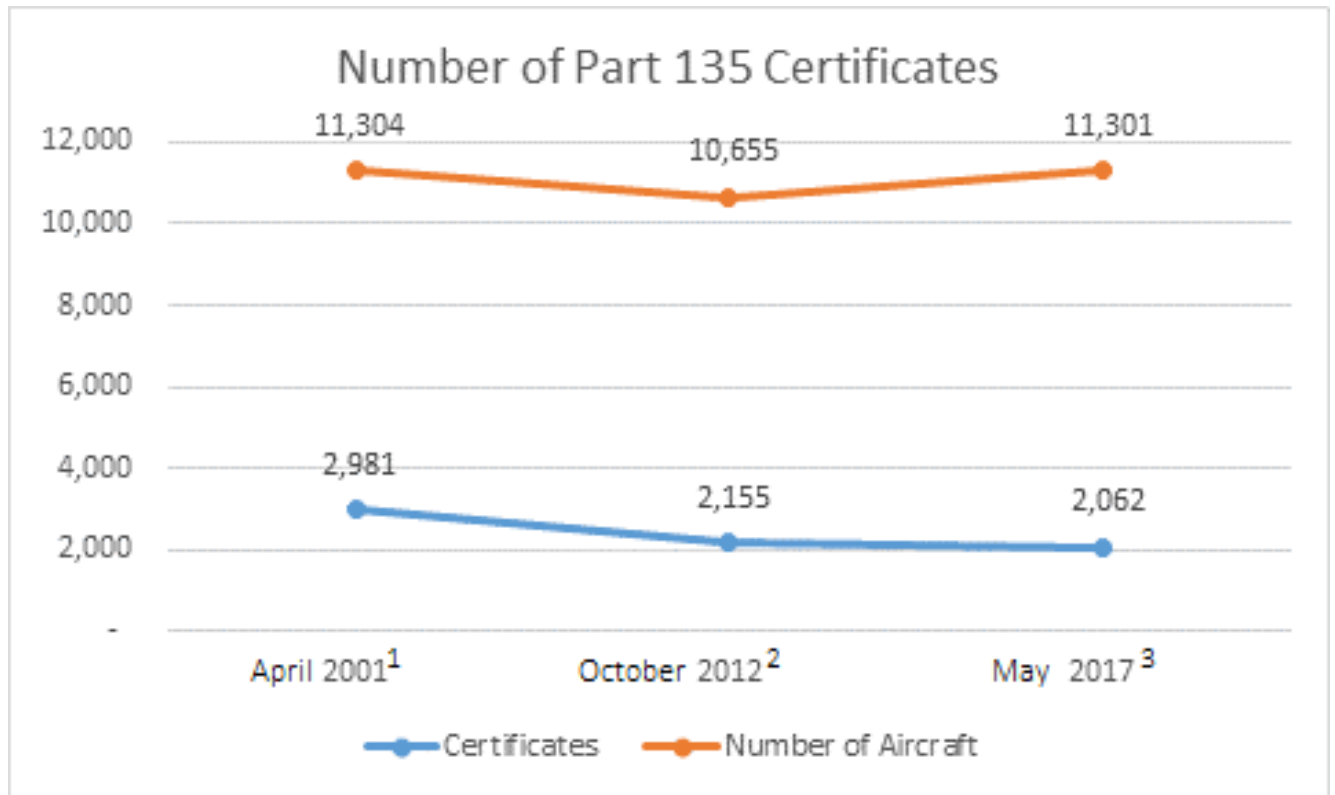
### Piston Aircraft and Total Piston Hours Flown

- Source: 2001-2010, 2012-2016, FAA General Aviation and Air Taxi Activity (and Avionics) Surveys.
- Note: An active aircraft is one that has a current registration and was flown at least one hour during the calendar year
- The forecasted total piston aircraft fleet is projected to decrease by 0.8% each year from 2018-2038 versus the projected decrease per annum of 0.8% for total piston aircraft hours flown.



#### Turbine Aircraft and Total Turbine Hours Flown

- Source: 2001-2010, 2012-2016, FAA General Aviation and Air Taxi Activity (and Avionics) Surveys.
- Note: An active aircraft is one that has a current registration and was flown at least one hour during the calendar year
- Note: Includes Turboprop and Turbojet Aircraft
- The forecasted total turbine aircraft fleet is projected to increase by 2.0% each year from 2018-2038 versus the projected increase per annum of 2.4% for total turbine aircraft hours flown.



#### Sources:

- <sup>1</sup> Report to Congress Under Section 735 of the Wendell H. Ford Aviation Investment and Reform Act for the 21st Century
- <sup>2</sup> Study of Operator Regulated Under Part 135, FAA Modernization and Reform Act of 2012
- <sup>3</sup> Download of data from FAA at [http://av-info.faa.gov/dd\\_sublevel.asp?Folder=%5CAirOperators](http://av-info.faa.gov/dd_sublevel.asp?Folder=%5CAirOperators) on May 30, 2017

#### Data Includes:

- On-Demand Passenger, Passenger & Cargo, Cargo Only Operators and Scheduled Part 135 Operators (“commuters”)
- Operators with dual 121/135 certification are excluded from 2001 and 2012 data, but included in other dates.

[April 2016 Study of Operators Regulated Under Part 135](#)

[Automatic Dependent Surveillance-Broadcast \(ADS-B\) Equipage](#)

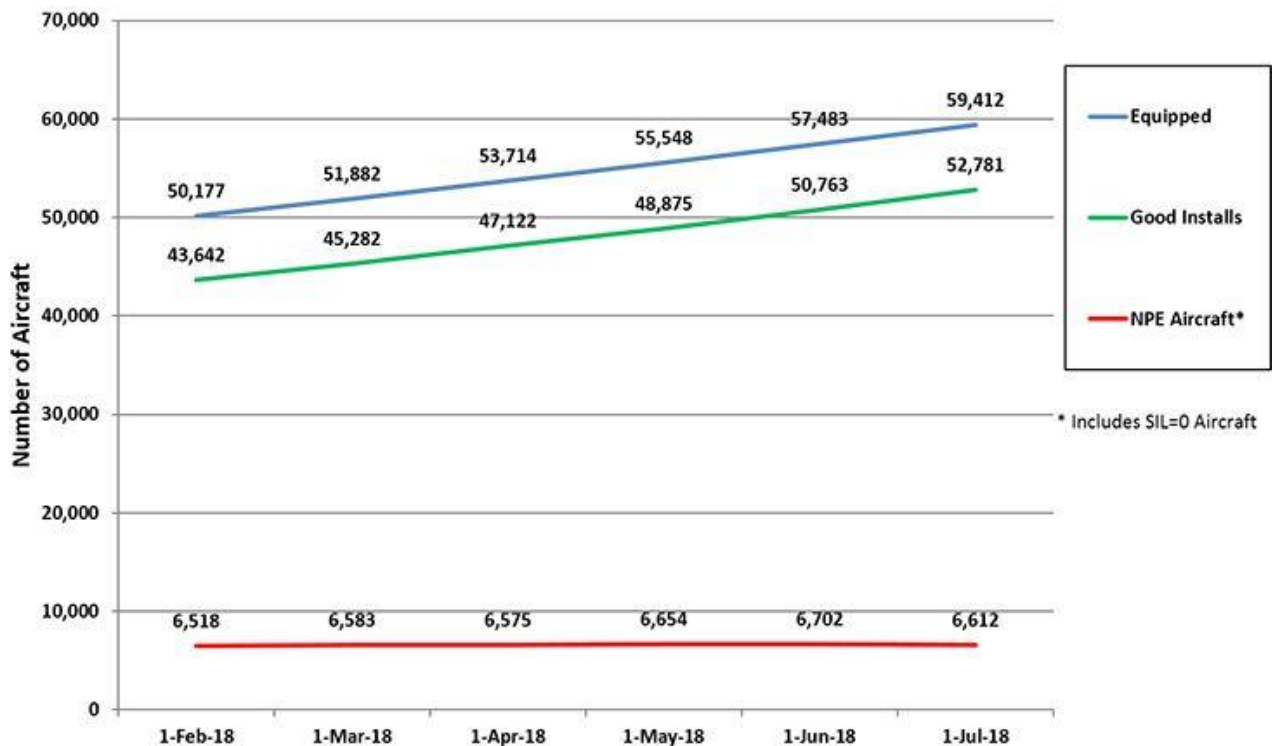
- Learn more at [Equip ADS-B](#)

- By January 1, 2020, aircraft operators must be equipped with ADS-B Out to fly in most controlled airspace. The FAA's [website](#) provides further information on the agency's [equipage rebate](#) program, Exemption 12555, links to federal regulations, articles and ACs, and FAQs
- [14 CFR 91.225](#) and [14 CFR 91.227](#) provides further information on ADS-B Out equipment, use, and performance requirements.

### Current ADS-B Industry Adoption

- As of July 1, 2018, roughly 52% of the business jets registered in the United States have not yet complied with the upcoming ADS-B mandate. That means that a little over 7,000 business jets do not yet have ADS-B Out capability.
- At the current rate of ADS-B adoption, which in July was roughly 203 aircraft per month, about 3,300 aircraft will still need ADS-B when the mandate goes into effect. Those aircraft, for all intents and purposes, will be grounded. For the entire fleet to be ADS-B compliant, 406 aircraft need to be updated every month from now until the mandate goes into effect.
- *This data was provided by Duncan Aviation. Duncan Aviation's data analytics team compiles ADS-B compliance information from several different sources, including the company's proprietary customer database and the FAA, to track ADS-B compliance in the U.S. business jet fleet. The data is updated every two months.*

### All US Aircraft Equipage & Avionics Performance





## **CBP General Aviation Airports**

[CBP General Aviation Airports as of October 1, 2019](#)