Light Jets in the Mediterranean: The case of the Phenom

Roch Hennessy, Regional Sales Director

Malta - September, 13th 2013
FORWARD LOOKING STATEMENT

This presentation includes forward-looking statements or statements about events or circumstances which have not occurred. We have based these forward-looking statements largely on our current expectations and projections about future events and financial trends affecting our business and our future financial performance. These forward-looking statements are subject to risks, uncertainties and assumptions, including, among other things: general economic, political and business conditions, both in Brazil and in our market.

The words “believes,” “may,” “will,” “estimates,” “continues,” “anticipates,” “intends,” “expects” and similar words are intended to identify forward-looking statements. We undertake no obligations to update publicly or revise any forward-looking statements because of new information, future events or other factors. In light of these risks and uncertainties, the forward-looking events and circumstances discussed in this presentation might not occur. Our actual results could differ substantially from those anticipated in our forward-looking statements.
Content

This is BUSINESS aviation

Market Drivers

N10Y Market Forecast

Embraer Executive Jets
This is BUSINESS aviation
Business aviation, a productivity tool

**Productivity**
“Office in the sky”

**Privacy**
Choose who to travel with
Business aviation, a productivity tool

Flexibility
Customer decides where and when to go

Speed
Point-to-point operation
Business aviation, increasing shareholder value

“Our results confirm that companies using business aviation in the S&P 500 mitigated revenue losses and recovered more quickly than non-users”.

Source: Business Aviation - Maintaining Shareholder Value Through Turbulent Times. Nexa - fall 2012 report to NBAA.
Bizav market cycles: US economic driven market

- Fleet*
- Recession/slow growth periods in US
- # models

Sources: ACAS, GAMA, Jetnet, Embraer Forecast - 2013

*not including Personal Jets deliveries

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Business jet worldwide fleet is growing

North America & Caribbean
12,203 units (63%)  
US$ 115 Bi (55%)

Europe, Middle East & Africa
3,749 units (19%)  
US$ 57 Bi (28%)

Asia Pacific
701 units (4%)  
US$ 10 Bi (5%)

China
323 units (2%)  
US$ 10 Bi (5%)

Latin America
2,235 units (12%)  
US$ 15 Bi (7%)

Worldwide fleet
19,268 units  
US$ 208 Bi

* Based on fair market value e.c. 2013  
* Sources: Jetnet and Embraer analysis – August 19th, 2013  
* Some aircraft were still missing their region of operation until the release of this analysis
Market Drivers
Market drivers also affected by the “intangible”

- Willingness to invest
- Stock Markets
- Pre-Owned Market
- Business Aviation Traffic
- Finance availability
- Sales of New Business Jets
- Wealthy Pop.
- Corporate Profits
- Exchange Rate
- Airport Infra
- Regulat. Environ.
World GDP growth rates

Source: EIU – August 2013
Worldwide HNWIs population

New record level

Source: World Wealth Report

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Business Jet Traffic – Europe

Source: Eurocontrol – August 30th, 2013

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Business jets pre-owned market inventory

Source: Jetnet and Embraer Analysis, August 2013.
L12M bizjet fleet movement (pre-owned)

North America & Caribbean
Inflow: 377 units
Outflow: 331 units
Net: 46 units

Europe, Africa & Middle East
Inflow: 132 units
Outflow: 265 units
Net: -133 units

China
Inflow: 17 units
Outflow: 13 units
Net: 4 units

Latin America
Inflow: 196 units
Outflow: 128 units
Net: 68 units

Asia Pacific
Inflow: 56 units
Outflow: 41 units
Net: 15 units

Source: Jetnet and Embraer analysis – Jun 2012 to Jun 2013

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N10Y Market Forecast
Market recovery in slow motion

- **US Corporate profits at record levels**
- **HNWI at record levels**
- **World GDP growth is moderate**
- **Used market inventory leveled off**
- **Traffic recovery on track but slower than expected**
- **European markets still at risk; emerging countries slowing down**

Lack of confidence is holding the bizjet market turnaround

USA market will dictate the speed of recovery
Business jet market perspectives

US$ Billion (and Units)

- **2003-2012**
  - **US$ 168 Bi**
    - (8,100 jets)

- **2014-2023**
  - **Mild Growth**
    - **US$ 250 Bi**
      - (9,244 jets)
  - **Another Downturn**
    - **US$ 218 Bi**
      - (8,350 jets)

Source: Embraer analysis – July 2013 – 2013 Economic conditions

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2014-2023 market forecast compared to 2012’s

8,350 to 9,244 jets → U$ 218 to U$ 250 bi over the next 10 years

New Jets Deliveries Values

2014-2023 Forecast

Mild Growth
9,244 units
US$ 250 billion

Another Downturn
8,350 units
US$ 218 billion
2014-2023 Market forecast by region

9,250 jets representing US$ 250 bi over the next 10 years

**North America**
- 4,530 a/c (49%)
- US$ 117 Bi (47%)

**EMEA**
- 2,330 a/c (25%)
- US$ 70 Bi (28%)

**Asia Pacific**
- 725 a/c (8%)
- US$ 21 Bi (8%)

**Latin America**
- 860 a/c (9%)
- US$ 15 Bi (6%)

**China**
- 805 a/c (9%)
- US$ 29 Bi (11%)

Source: Embraer Analysis

Note: Sum of regional numbers might differ from total numbers due to rounding

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# N10Y world deliveries forecast

## Category breakdown Slow Growth Scenario

### World

<table>
<thead>
<tr>
<th>Units</th>
<th>US$</th>
</tr>
</thead>
<tbody>
<tr>
<td>2%</td>
<td>7%</td>
</tr>
<tr>
<td>15%</td>
<td>33%</td>
</tr>
<tr>
<td>18%</td>
<td>26%</td>
</tr>
<tr>
<td>14%</td>
<td>12%</td>
</tr>
<tr>
<td>10%</td>
<td>12%</td>
</tr>
<tr>
<td>19%</td>
<td>7%</td>
</tr>
<tr>
<td>10%</td>
<td>6%</td>
</tr>
</tbody>
</table>

### Europe + CIS

<table>
<thead>
<tr>
<th>Units</th>
<th>US$</th>
</tr>
</thead>
<tbody>
<tr>
<td>2%</td>
<td>13%</td>
</tr>
<tr>
<td>6%</td>
<td>29%</td>
</tr>
<tr>
<td>13%</td>
<td>29%</td>
</tr>
<tr>
<td>21%</td>
<td>29%</td>
</tr>
<tr>
<td>9%</td>
<td>14%</td>
</tr>
<tr>
<td>16%</td>
<td>10%</td>
</tr>
<tr>
<td>17%</td>
<td>6%</td>
</tr>
<tr>
<td>16%</td>
<td>5%</td>
</tr>
<tr>
<td>5%</td>
<td>1%</td>
</tr>
</tbody>
</table>
Embraer S.A. today

COMMERCIAL AVIATION

EXECUTIVE AVIATION

EMBRAER DEFENSE AND SECURITY
Embraer S.A. net revenues

<table>
<thead>
<tr>
<th>Year</th>
<th>Net revenues (US$ Mi)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007</td>
<td>5,245</td>
</tr>
<tr>
<td>2008</td>
<td>6,335</td>
</tr>
<tr>
<td>2009</td>
<td>5,498</td>
</tr>
<tr>
<td>2010</td>
<td>5,364</td>
</tr>
<tr>
<td>2011</td>
<td>5,803</td>
</tr>
<tr>
<td>2012</td>
<td>6,178</td>
</tr>
<tr>
<td>6M13</td>
<td>2,643</td>
</tr>
</tbody>
</table>

Revenues per Segment 2012

- Commercial Aviation: 61%
- Executive Aviation: 21%
- Defense and Security: 17%
- Other: 1%

Source: Embraer institutional presentation – August 2013

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VISION:

To become a major player in the Business Aviation Market by 2015 through innovative and differentiating product and service solutions with added value to our customers and shareholders.
Embraer Executive Jets: Manufacturing plants

Global positioning: 4 countries and 7 sites
Expanding Service Center Global Network

- Nearly 70 service centers worldwide
- Legacy 500 authorized service center network under development, 17 with LOI signed
Customer Satisfaction – 2\textsuperscript{nd} position AIN Survey

![AIN 2013 Product Support Survey](image)

### Combined Overall Average Ratings of Newer and Older Aircraft

The chart below provides the overall average rating of each manufacturer when the newer and older aircraft scores are combined. This gives OEMs and readers a glimpse of a manufacturer’s overall support ratings for all its products. The chart is broken down by jets and turboprops, as the level of service and support can vary widely between the two segments.

<table>
<thead>
<tr>
<th>Manufacturer</th>
<th>Overall Average 2013</th>
<th>Overall Average 2012</th>
<th>Rating Change from 2012-2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gulfstream (G11-GV, G300-G650)</td>
<td>8.3</td>
<td>8.2</td>
<td>0.1</td>
</tr>
<tr>
<td>Embraer (Phenom, Legacy, Lineage)</td>
<td>8.2</td>
<td>8.1</td>
<td>0.1</td>
</tr>
<tr>
<td>Bombardier (Learjet)</td>
<td>7.9</td>
<td>7.4</td>
<td>0.5</td>
</tr>
<tr>
<td>Cessna (Citation)</td>
<td>7.8</td>
<td>7.7</td>
<td>0.1</td>
</tr>
<tr>
<td>Gulfstream (Astra, G100-G280)</td>
<td>7.7</td>
<td>7.5</td>
<td>0.2</td>
</tr>
<tr>
<td>Bombardier (Challenger)</td>
<td>7.6</td>
<td>7.7</td>
<td>0.1</td>
</tr>
<tr>
<td>Bombardier (Global)</td>
<td>7.6</td>
<td>7.4</td>
<td>0.2</td>
</tr>
<tr>
<td>Dassault (Falcon)</td>
<td>7.5</td>
<td>7.6</td>
<td>0.1</td>
</tr>
<tr>
<td>Hawker Beechcraft (Diamond, Premier, Beechjet 400/400A, Hawker 400XP)</td>
<td>6.9</td>
<td>7.2</td>
<td>0.3</td>
</tr>
<tr>
<td>Hawker Beechcraft (Hawker)</td>
<td>6.9</td>
<td>7.1</td>
<td>0.2</td>
</tr>
</tbody>
</table>

Source: AIN, August 2013
We are innovative

Robb Report’s 25th Anniversary special issue

Source: Robb Report, August 2013

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Embraer Executive Jets Global Presence

Phenom 300: 130+
Phenom 100: 275+
Legacy 600/650: 200+
Lineage 1000: 10+

630+ executive jets in service in more than 50 countries
## 2013 Guidance

<table>
<thead>
<tr>
<th>Executive jets</th>
<th>Deliveries 2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Light jets</td>
<td>80 to 90</td>
</tr>
<tr>
<td>Larger jets</td>
<td>25 to 30</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>105 to 120</strong></td>
</tr>
</tbody>
</table>

PRODUCT HIGHLIGHTS

- **Premium comfort**
  - Intelligent design – BMW DesignworksUSA
  - Roomiest cabin in its class – Oval Lite® solution
  - Largest baggage capacity in class – up to 71 ft³ (2,010 ℓ)

- **Docile flying characteristics**
  - Single-pilot workload philosophy

- **Low operating costs**
  - Lower mission costs than competitors, including turboprops
  - Designed for High Utilization and availability

- **Optimized performance**
  - 390 ktas High Speed Cruise
  - 1,178 nm range with 4 occupants @ LRC

- **Next generation technology**
  - State-of-the-art Prodigy® Flight Deck 100

- **Robb's Report's Best of the Best award recipient**
EXTERNAL DIMENSIONS

- Clean sheet design
- Straight wings
- Low approach speeds

17 ft 6 in
(5.34 m)

42 ft 1 in
(12.82 m)

14 ft 3 in
(4.35 m)

40 ft 4 in
(12.30 m)
* Crystal interior theme

INDEX
**INTERNAL DIMENSIONS**

**OVERVIEW | INTERIOR | PERFORMANCE | SYSTEMS | ECONOMICS | UNIQUE FEATURES | COMPETITIVE ANALYSIS | CUSTOMER SUPPORT | ANNOUNCEMENTS**

Product Strategy & Sales Engineering

---

**Cross section – Oval Lite®**

- Highest and widest cross section in the category
- More legroom and more headroom
- A result of Embraer and BMW DesignworksUSA commitment to ergonomics aspects

*Dimensions may vary with interior configuration.*

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Intelligent design: Luxury, space and comfort
Two floor plan layouts available

**Layout 1**
6 Occupants configuration (basic configuration)

- Wardrobe / Refreshment Center*
- Foldable Tables
- Lavatory
- Storage Area (half height cabinet)

**Layout 2**
8 Occupants configuration (included optional belted toilet and optional 5th seat*)

- Optional 5th seat
- Foldable Tables
- Optional belted lavatory
- Storage Area (half height cabinet)

* Optional item subject to availability
Cabin Temperature

- Phenom 100 offers 2 distinct temperature zones (Cockpit and Pax Cabin), allowing better pilot and passenger comfort
- With the VIP Panel (opt.), the passengers are able to control the temperature from the cabin
- Electronically controlled thermostat ensures precise temperature control

* Some items are optional.
Baggage capacity

- Largest baggage capacity in class

Total capacity of 71 ft³ (2,010 ℓ)

- AFT baggage compartment
  “Best in class”

<table>
<thead>
<tr>
<th>Capacity</th>
<th>Volume</th>
<th>Weight</th>
</tr>
</thead>
<tbody>
<tr>
<td>7 ft³</td>
<td>198 ℓ</td>
<td>66 lb</td>
</tr>
<tr>
<td>6 ft³</td>
<td>170 ℓ</td>
<td>66 lb</td>
</tr>
<tr>
<td>5 ft³</td>
<td>141 ℓ</td>
<td>33 lb</td>
</tr>
<tr>
<td>53 ft³</td>
<td>1,501 ℓ</td>
<td>353 lb</td>
</tr>
</tbody>
</table>

Source: B&CA May 2013
Winter baggage/Summer baggage

2 Pairs of Skis - 72.8 in x 5 in (1.85 m x 0.125 m)

4 Golf Bags - 9 in Diameter x 46 in (0.23 m x 1.17 m)

4 garment bags
21 in x 23 in x 8 in (0.53 m x 0.58 m x 0.2 m)

4 roll-on bags
22 in x 14 in x 10 in (0.56 m x 0.36 m x 0.25 m)

4 laptop bags
16.5 in x 13.5 in x 4 in (0.42 m x 0.34 m x 0.10 m)
COCKPIT and PERFORMANCE
**Design Drivers**

- Single pilot operation
- Human factors
- Enhanced situational awareness
- Glass cockpit with large displays
- State-of-the-art avionics
Assumptions

- 4 Occupants @ 90.7 kg
- LRC Cruise speed
- ISA temperature enroute
- Takeoff at 85% annual temperature
- 85% annual winds
- 3% airways allowance
- EU OPS-1 Reserves
  - 100nm alternate airport
  - 30 min holding at 1,500 ft overhead alternate
  - 5% Trip Fuel
- Baseline EASA Operating Empty Weight
Assumptions

- 4 Occupants @ 90.7 kg
- LRC Cruise speed
- ISA temperature enroute
- Takeoff at 85% annual temperature
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- 3% airways allowance
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OVERVIEW | INTERIOR | PERFORMANCE | SYSTEMS | ECONOMICS | UNIQUE FEATURES | COMPETITIVE ANALYSIS | CUSTOMER SUPPORT | ANNOUNCEMENTS

THE INFORMATION HEREIN IS SUBJECT TO THE DISCLAIMER PRESENTED IN THE LAST PAGE OF THIS DOCUMENT.
## DOC breakdown (Conklin & de Decker 2013 Volume I)

<table>
<thead>
<tr>
<th>Cost Item</th>
<th>US$ per Flight Hour (FH)</th>
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</thead>
<tbody>
<tr>
<td>Fuel (@ US$ 7.38 /gal)</td>
<td>811.80</td>
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<tr>
<td>Airframe Maint. Labor</td>
<td>51.30</td>
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<tr>
<td>Airframe Maint. Parts</td>
<td>54.98</td>
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<tr>
<td>Engine Maintenance</td>
<td>227.31</td>
</tr>
<tr>
<td>Miscellaneous Expenses</td>
<td>74.54</td>
</tr>
<tr>
<td><strong>DOC Total</strong></td>
<td><strong>1,219.98</strong></td>
</tr>
</tbody>
</table>

**DOC per nm**

| US$ 3.79 per nm |

### Assumptions:
- 543 FH / year. Utilization of 175,000 nm / year of utilization and 600 nm of average stage length.
- Block fuel and block time calculated at 600 nm. (Conklin includes 15% Fuel consumption addition).
- 10 years utilization.
- Labor rate of US$ 90 per hour.
- Engine costs are enclosed in the Maintenance numbers and are C&dD estimates.
### COMPARISON WITH TURBOPROP

**OVERVIEW | INTERIOR | PERFORMANCE | SYSTEMS | ECONOMICS | UNIQUE FEATURES | COMPETITIVE ANALYSIS | CUSTOMER SUPPORT | ANNOUNCEMENTS**

Operational costs vs. Flight time (B&CA 2012)

<table>
<thead>
<tr>
<th>Mission</th>
<th>Phenom 100</th>
<th>Turboprop</th>
<th>Phenom 100 savings</th>
</tr>
</thead>
<tbody>
<tr>
<td>300 nm mission</td>
<td>56</td>
<td>74</td>
<td>24%</td>
</tr>
<tr>
<td>Flight time (min)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cost (US$)</td>
<td>871</td>
<td>1,013</td>
<td>14%</td>
</tr>
<tr>
<td>600 nm mission</td>
<td>110</td>
<td>142</td>
<td>23%</td>
</tr>
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<td>Flight time (min)</td>
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<tr>
<td>Cost (US$)</td>
<td>1,486</td>
<td>1,871</td>
<td>21%</td>
</tr>
<tr>
<td>1,000 nm mission</td>
<td>184</td>
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<td>22%</td>
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<td></td>
<td></td>
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<tr>
<td>Cost (US$)</td>
<td>2,341</td>
<td>2,868</td>
<td>18%</td>
</tr>
</tbody>
</table>

* B&CA does not include engine expenses.

**Speed of a jet, better economics than a turboprop**

- **Phenom 100**: Speed of a jet, better economics than a turboprop
- **Turboprop**:

  - Speed of a jet, better economics than a turboprop

  **Phenom 100 savings**

<table>
<thead>
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PRODUCT OVERVIEW

OVERVIEW | INTERIOR | PERFORMANCE | SYSTEMS | ECONOMICS | UNIQUE FEATURES | COMPETITIVE ANALYSIS | CUSTOMER SUPPORT | ANNOUNCEMENTS

PRODUCT OVERVIEW

- A true clean sheet design - the first in over a decade
- "Intelligent luxury" concept - BMW DesignWorksUSA
- Exclusive Oval Lite® cabin
- New generation avionics - Prodigy Flight Deck 300®
- Top class speed, climb and field performance
- Truly designed for high utilization - airliner DNA
- Equipped with features only available in larger jets
- Low operating costs
- Impressive ramp presence - swept back wings with winglets
- 2010's most delivered light jet in the world
- Robb's Report's Best of the Best 2011 and 2012 award recipient
- FLYING Magazine Editor's Choice Award winner
EXTERNAL DIMENSIONS

- **Clean sheet design**
- **Swept wings**

**EXTERNAL DIMENSIONS**

- **16 ft 9 in** (5.1 m)
- **51 ft 4 in** (15.6 m)
- **19 ft 7 in** (6.0 m)
- **52 ft 2 in** (15.9 m)
Is it just a stretched Phenom 100?

No, it is a lot more than that!

<table>
<thead>
<tr>
<th></th>
<th>PHENOM 100</th>
<th>PHENOM 300</th>
</tr>
</thead>
<tbody>
<tr>
<td>CEILING</td>
<td>41,000 ft</td>
<td>45,000 ft</td>
</tr>
<tr>
<td>CABIN SEATS (STD)</td>
<td>4</td>
<td>6</td>
</tr>
<tr>
<td>RANGE</td>
<td>1,178 nm</td>
<td>1,971 nm</td>
</tr>
<tr>
<td>MMO</td>
<td>0.70</td>
<td>0.78</td>
</tr>
<tr>
<td>HIGH SPEED CRUISE</td>
<td>390 kts</td>
<td>453 kts</td>
</tr>
<tr>
<td>MAX CABIN ALTITUDE</td>
<td>8,000 ft</td>
<td>6,600 ft</td>
</tr>
<tr>
<td>THRUST</td>
<td>1,695 lb</td>
<td>3,360 lb</td>
</tr>
</tbody>
</table>
Cross section – Oval Lite®

- More legroom and more headroom
- A result of Embraer and BMW DesignworksUSA commitment to ergonomics aspects

The difference between the standard circular cross section to the Oval Lite® design
Cabin configurations

Cabin Volume – 325 ft³ (9.2 m³)

8 Occupants
Standard

10* Occupants
Optional

11* Occupants
Optional

(*) Including optional belted toilet

17 ft 2 in (5.23 m)

14 ft 9 in (4.50 m)
Summer baggage

**6 Golf Bags** - 9 in Diameter x 46 in (0.23 m x 1.17 m)

6 garment bags
21 in x 23 in x 8 in (0.53 m x 0.58 m x 0.2 m)

6 roll-on bags
22 in x 14 in x 10 in (0.56 m x 0.36 m x 0.25 m)

6 laptop bags
16.5 in x 13.5 in x 4 in (0.42 m x 0.34 m x 0.10 m)
Design Drivers
- Single Pilot Operation
- Human Factors
- Glass Cockpit with large displays
- State-of-the-art avionics
- Enhanced Situational Awareness
Design Drivers

- Single Pilot Operation
- Human Factors
- Glass Cockpit with large displays
- State-of-the-art avionics
- Enhanced Situational Awareness
- Touch-screen controlled glass flight deck
Assumptions

- 6 Occupants @ 90.7 kg
- LRC Cruise speed
- ISA temperature enroute
- Takeoff at 85% annual temperature
- 85% annual winds
- 3% airways allowance
- EU OPS-1 Reserves
  - 100nm alternate airport
  - 30 min holding at 1,500 ft overhead alternate
- 5% Trip Fuel
- Baseline EASA Operating Empty Weight
Assumptions

- 6 Occupants @ 90.7 kg
- LRC Cruise speed
- ISA temperature enroute
- Takeoff at 85% annual temperature
- 85% annual winds
- 3% airways allowance
- EU OPS-1 Reserves
  100nm alternate airport
  30 min holding at 1,500 ft overhead alternate
  5% Trip Fuel
- Baseline EASA Operating Empty Weight
## Direct Operating Costs (DOC) – Conklin & de Decker

<table>
<thead>
<tr>
<th>Costs Breakdown</th>
<th>Phenom 300 (US$/FH)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fuel (@ US$7.38/gal)</td>
<td>1,291.50</td>
</tr>
<tr>
<td>Airframe Maint. Labor and Parts</td>
<td>150.21</td>
</tr>
<tr>
<td>Engine Maintenance</td>
<td>288.36</td>
</tr>
<tr>
<td>Miscellaneous Expenses</td>
<td>123.60</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>1,853.67</strong></td>
</tr>
</tbody>
</table>

*Per Conklin & deDecker, 2013 vol I, assumptions*

**Assumptions**
- Approximately 438 FH/ year. Utilization of 175,000 nm/year and 600 nm of average stage length.
- FH / FC: approximately 1h 30min.
- Block fuel and block time calculated for a 600 nm mission. (Conklin includes 15% Fuel consumption addition).
- 10 years utilization.
- Fuel price of USD 7.38 per gallon.
- Labor rate of USD 90 per hour.
## Direct Operating Costs for a 600 nm mission

<table>
<thead>
<tr>
<th></th>
<th>Phenom 300</th>
<th>Turboprop</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flight time (min)</td>
<td>90</td>
<td>123</td>
<td>-26.8%</td>
</tr>
<tr>
<td>600 nm mission cost (US$)</td>
<td>1,843</td>
<td>1,921</td>
<td>-4.1%</td>
</tr>
</tbody>
</table>


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