

2012 LSA Market Shares — Cubs & Surprises

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Our annual review of LSA Market Share brings our updated fleet chart and a second chart showing prior-year registrations. While sales of new SLSA remains below par, the market appears to be experiencing spotty but regular recovery from earlier low points. The first half the year foretold a better recovery but the last half of the year stalled somewhat. Regardless, based on traffic to this website, LSA interest is higher than ever. For January 2013, ByDanJohnson.com set all-time records in Unique Visitors and all other measuring criteria. Thank you for your support!

Special Light-Sport Aircraft Market Shares thru December 2012				
<i>only fixed wing airplanes given a rank</i>				
Rank	Manufacturer	Main Model	Number of Aircraft	Market Share
1	Flight Design	CTLSI *	351	14.2%
2	Cessna • (built in China)	Skycatcher	276	11.2%
3	CubCrafters •	CarbonCubSS*	232	9.4%
4	Czech Sport Aircraft	SportCruiser *	192	7.8%
5	American Legend •	Legend Cub	173	7.0%
6	Tecnam	Sierra *	146	5.9%
7	Remos	GX NXT *	118	4.8%
8	Jabiru US †	J-230 *	109	4.4%
9	Evektor	SportStar	93	3.8%
10	TL Ultralight (SportairUSA)	Sting S4 *	79	3.2%
11	Aeropro (Aerotrek in USA)	A240/A220	72	2.9%
12	LSA America •	Allegro	55	2.2%
13	Rans •	S-7 Courier *	40	1.6%
14	ICP (formerly Skykits †)	Savannah *	29	1.2%
15	FP&A † (Aeroprakt)	Valor A-22 *	25	1.0%
16	Aero SP (formerly Gobosh)	AT-4	24	1.0%
17	Magnaghi (formerly III)	Sky Arrow	22	0.9%
18	Zlin (SportairUSA)	Savage (iCub)	21	0.8%
19	Arion Aircraft •	LS-1	20	0.8%
20	Phoenix Air	Phoenix	13	0.5%
All other producers...			381	15.4%
TOTAL SLSA AIRPLANES **			2,471	100.0%

Notes: * Company has multiple models certified and counted here
 ** ELSA, Weight Shift, Powered Parachutes, Other types not counted
 • Designed or Manufactured in USA † Assembled in USA
 —FAA database research by Jan Fridrich of the Czech LAA—

2012 Market Share report — Nearby, we present our standard market share numbers. Our original chart remains consistent, illustrating the “installed base,” or “fleet size.” Because we know many of you seek recent-year information we are repeating the Calendar Year chart that debuted last year.

SLSA+ Registrations — Calendar Year 2012				
<i>only fixed wing airplanes given a rank</i>				
Rank	Manufacturer	Main Model	Aircraft Registered in Year	Share
1	Cessna • (built in China)	Skycatcher	94	36.3%
2	CubCrafters •	CarbonCubSS*	48	18.5%
3	Aeropro (Aerotrek)	A240/A220	13	5.0%
4T	Flight Design	CTLS *	11	4.2%
4T	American Legend •	Legend Cub *	11	4.2%
6T	Czech Sport Aircraft	SportCruiser *	10	3.9%
6T	Phoenix Air	Phoenix	10	3.9%
8	Pipistrel	Virus SW	7	2.7%
9	Tecnam	Sierra	6	2.3%
10	Jabiru US †	J-230 *	5	1.9%
All other producers...			44	17.0%
TOTAL SLSA AIRPLANES in 2011			259	100.0%

Notes: † SLSA are fully manufactured Special Light-Sport Aircraft
 * Company has multiple models certified and counted here
 • U.S. design and manufacturer † Assembled in USA
 —FAA database research by Jan Fridrich of the Czech LAA—

For the second year in a row Cessna lead in 2012 with an impressive 94 registrations though this is down 30% from 134 in 2011. While Cessna looked to set a new record with 76 registrations (152 annualized) in the first half of 2012, their pace slowed sharply in the second half, adding only 23, perhaps a result of their announcement about switching to Primary Category as a means of entering the European market. The Wichita giant is single-handedly restarting Primary Category with the first such application in nearly 20 years, a decision that may inspire other companies to go this route.

Perhaps the most noteworthy story in 2012 registrations is an even bet-



Cessna Skycatcher

ter performance by CubCrafters. The Washington State company added 48 new registrations, up 33% from 36 in 2011. Company marketing boss John Whitish reported 52 SLSA sales, which prompts us to ask that you read the notice at the end of this article. Congratulations to CubCrafters, clearly a company to keep watching.



CubCrafters CarbonCub SS

A remarkably steady climber is Aerotrek, which took the #3 slot for 2012 registrations, a notable improvement from their #5 spot in 2011. Despite some reports that all SLSA are expensive, Aerotrek has a very attractive price point and an impressively built, folding wing aircraft available in tailwheel or tricycle. Aerotrek consistently replies to our listings, with the goal of making our FAA registrations report more precise. This happens, for example, when sales occur to Canada with no N-number assigned or when a SLSA drops down to ELSA perhaps as the owner wants to make design changes (which is allowed as is owner maintenance). Other companies also

see differences explained by deregistration, accidents that remove the aircraft from the registry, or simple errors in data entry after a sale. Regardless of the variables in counting registrations versus sales, bravo to Aerotrek! Based on their faithful feedback we have been able to improve our accuracy.



Aerotrek A240

Other top guns in 2012 include perennial leaders like Flight Design, which remains convincingly atop the overall fleet and added 11 more registrations during the year and American Legend which revived from a sluggish 2011 to add 11 SLSA in 2012. SportCruiser importer US Sport Aircraft fulfilled the last of the PiperSport orders and rewrote their distributor agreement with Czech Sport Aircraft; they added another 10 SLSA in 2012. In a pleasant but unexpected turn, importer Phoenix Air USA added an impressive 10 SLSA registrations of their extremely lovely motorglider. Congratulations to all these leaders.

A member of the exclusive Over-100 Club listing only eight SLSA pro

ducers is Tecnam. The Italian company showed renewed vigor logging six registrations in the second half of the year. They also successfully completed an FAA audit in Italy. Among their five SLSA models, four are high-wing models yet their low wing Sierra has 51 units flying in America, more than any other Tecnam model. Another European producer with facilities in Italy is Pipistrel, which overcame regulatory hurdles in mid-year and has begun delivering SLSA to Americans. They also logged six in the last half of the year. Both Tecnam and Pipistrel report active sales outside the USA.



American Legend Cub

Unfortunately, one former high flyer, Remos, lost its U.S representative and has become very quiet though earlier this year, their CEO said they had recovered from the previous CEO's high-spending ways.

We are watching a few companies not on our fleet chart. One new entry to the SLSA scene is Bristell, in a new partnership with fractional ownership provider, AAP. They join some other companies that have not been active long enough to get on the fleet chart, but nonetheless deserve attention. These companies include World Aircraft Co., which is bringing all production to their Paris, Tennessee facility. Breezer is now established on the Sun 'n Fun campus and more is expected from them. Sky Arrow producer Magnaghi has new life and may resurge. Aero's AT-4 (formerly known as Gobosh) is back with new representation. Just Aircraft got rave reviews on their SuperSTOL model and this mostly kit company is enjoying a solid run of business something like 100% kit producers Zenith Aircraft and Sonex. While mentioning kit builders (not on our SLSA list), we must include Van's Aircraft, which has seen registration of 203 RV-12 kits.



Phoenix Air Phoenix Motorglider
photo by James Lawrence

We are also watching the pulse on seaplanes lead this year by Progres-

sive Aerodyne, which earned SLSA approval even as FAA increased their oversight via highly detailed audits. Congratulations to the SeaRey team for this significant accomplishment.

This brief look at the LSA market is not complete. One observation is that the "All other producers" category is now the largest percentage, indicating small producers continue to develop sales. Some companies not reflected in our Top-20 and Top-10 charts may emerge into these lists in the future. Others that have been in the Top-20 but which are no longer producing new aircraft were omitted. However, all SLSA models are covered in our SPLOG reports and you may also examine our Featured Aircraft (right column of most pages) for more exciting Light-Sport Aircraft and other aircraft Sport Pilots can fly.



Czech Sport Aircraft SportCruiser
photo by Jim Raeder

As I have said for years, a loud shout-out is owed to Jan Fridrich of the Czech LAA for the LSA Market Share report. Jan is also head of LAMA Europe and a tireless worker

for the advancement of Light-Sport aviation. He invests many hours to analyze data for each report. Thanks, Jan, on behalf of all ByDanJohnson.com readers. During 2013, we will work to solicit comments from producers to evaluate the sales versus registration numbers. This is not an easy task and no promises are made yet the effort seems worthwhile in the pursuit of better information.

Notice: As always, we observe for you that all numbers here are derived from FAA's N-number registration database and are subject to data entry errors. Figures presented are not identical to sales recorded by the companies though over time the numbers draw closer.



UPDATE 2/13/13:
GAMA held a press conference today where they

released their industry numbers. Get more on GAMA here, but this is where their figures relate to the Light-Sport market. Piston aircraft, singles and twins, suffered a minor drop, only 1.9% down; GAMA did list some LSA in their report but did not use them in summary tables. Turbines were up and GAMA added agricultural crop-spraying planes to their membership; many ag planes are turbine powered. Jets were down slightly more at minus 3.4%. Like the Light-Sport industry, GAMA is hoping for improvement in 2013 and they announced some.