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Big Delta order for Bombardier jets, likely next week, will be thorn in Boeing's side

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Steve Wilhelm
Staff Writer
Puget Sound Business Journal

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BOMBARDIER IMAGE

Delta Air Lines may be trying to build its relationships with customers in the Puget Sound area, but late next week the Atlanta company could drop a bomb that will be hardly friendly to hometown jet builder Boeing (NYSE: BA).

Delta (NYSE: DAL) is expected to announce on April 28 or 29 that it will order 75 Bombardier C Series jets, with options for 50 more, which would in effect breach the duopoly Airbus and Boeing have maintained in the all-important narrow-body sector.

“A mere 125 aircraft order shouldn’t mean much,” wrote Ernest Arvai, in [an AirInsight report](#). “But the C Series, entering service in 2016, has much more updated technology than the 737, first introduced in 1967, and the A320, first introduced in

1988.”

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While such an order would be tiny compared to Boeing’s order book for 4,380 model 737s, it’s still something Boeing is likely watching.

As the second-largest U.S. air carrier, Delta’s voice is powerful, and a purchase would give Canada’s Bombardier its first significant inroad among major carriers.

“It’s really bad news for Boeing, especially for the 737-700 and Max 7,” said [Michel Merluzeau](#), managing partner for Frost and Sullivan. “When an airline like Delta takes on a new system like this, it brings the program to an entirely different level.”

Boeing and Airbus have been driving down their own narrow body jet pricing, partly to fend off orders for the Bombardier jet.

The Bombardier jet features wings and fuselage made largely of carbon composites, reducing weight compared to the 737’s aluminum. The Bombardier jet also features advanced Pratt and Whitney geared turbofan engines similar to those Airbus offers on its A320neo. Boeing offers a comparable LEAP 1-B engine on the 737 Max series.

Analysts estimate the Bombardier jets may burn slightly less fuel than the Boeing jet, although that would be offset by the other expenses of incorporating a new model.

“It’s slightly more efficient than the Max,” said Scott Hamilton, president of [Leeham LLC., about the Bombardier jet](#).

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