

Aviation Infrastructure Challenges

Moderator: Sarah Kalmeta Director of International Business – South APAC,
Universal Weather & Aviation and AsBAA Board of Governor

Speakers:

John O'Meara, Aviation Concepts Technical Services Inc.

Maximilian Motschmann, International Jet Management Asia Ltd.

Abdul Charafeddin, UAS International Trip Support

Sheree Cheung, Hong Kong Business Aviation Centre

Aviation Infrastructure Challenges

- How do airports view business aviation?
- Will business jets always get crowded out?
- Why foreign director investors fly in on business jets



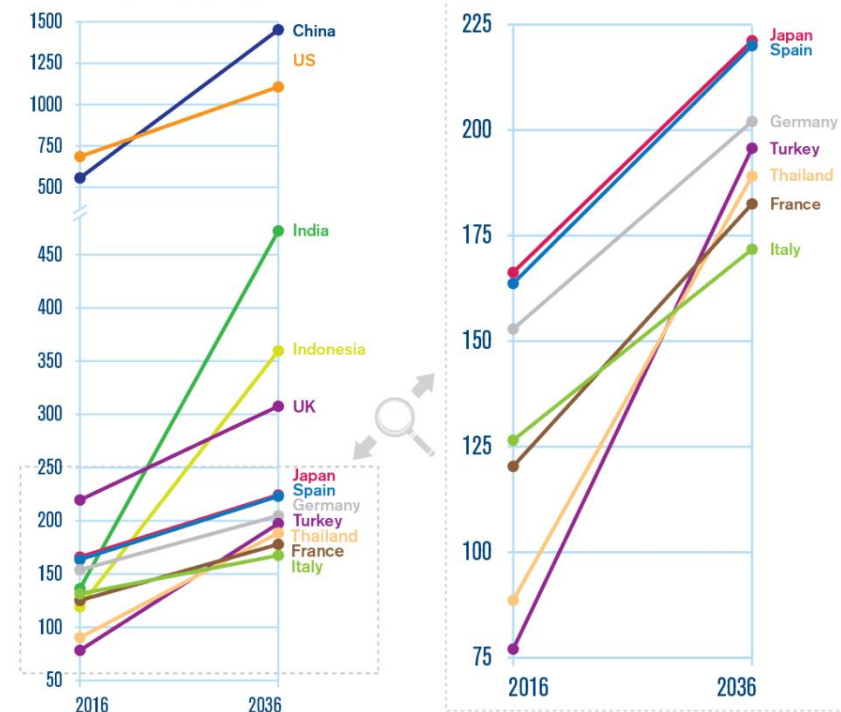
Infrastructure – A Dire Situation with Exponential Growth

IATA Code	Name	RUNWAYS			TERMINAL		
		2013 Aircraft Movements	2013 Growth Rate	Capacity limit reached	2013 Passengers in Millions	2013 Growth Rate	Capacity limit reached
PEK	Beijing Capital	567,759	1.9%	2019	83.7	2.2%	FULL
PVG	Shanghai	371,190	2.6%	2021	47.2	5.1%	2018
HKG	Hong Kong	382,782	5.7%	2016	59.6	6.3%	FULL
BOM	Mumbai	269,394	4.4%	2020	32.0	6.4%	2018
DEL	Delhi	309,074	1.3%	2022	36.7	7.3%	2021
CGK	Jakarta	398,985	4.9%	2021	60.1	4.1%	FULL
NRT	Narita	223,377	6.1%	2029	35.3	7.5%	2022
KUL	Kuala Lumpur	326,678	15.3%	2023	47.5	19.1%	2022
MNL	Manila	271,508	-0.6%	2019	32.9	3.1%	2015
SIN	Singapore	346,796	6.0%	2018	53.7	5.0%	2018
ICN	Incheon	273,866	6.8%	2022	41.7	6.4%	2015
BKK	Bangkok	301,747	-4.8%	2023	51.4	-3.1%	FULL
DXB	Dubai	369,953	7.5%	2019	66.4	15.2%	2016
HAN	Hanoi	89,835	6.6%	NO DATA	12.8	13.1%	FULL

Source: IATA/ACI

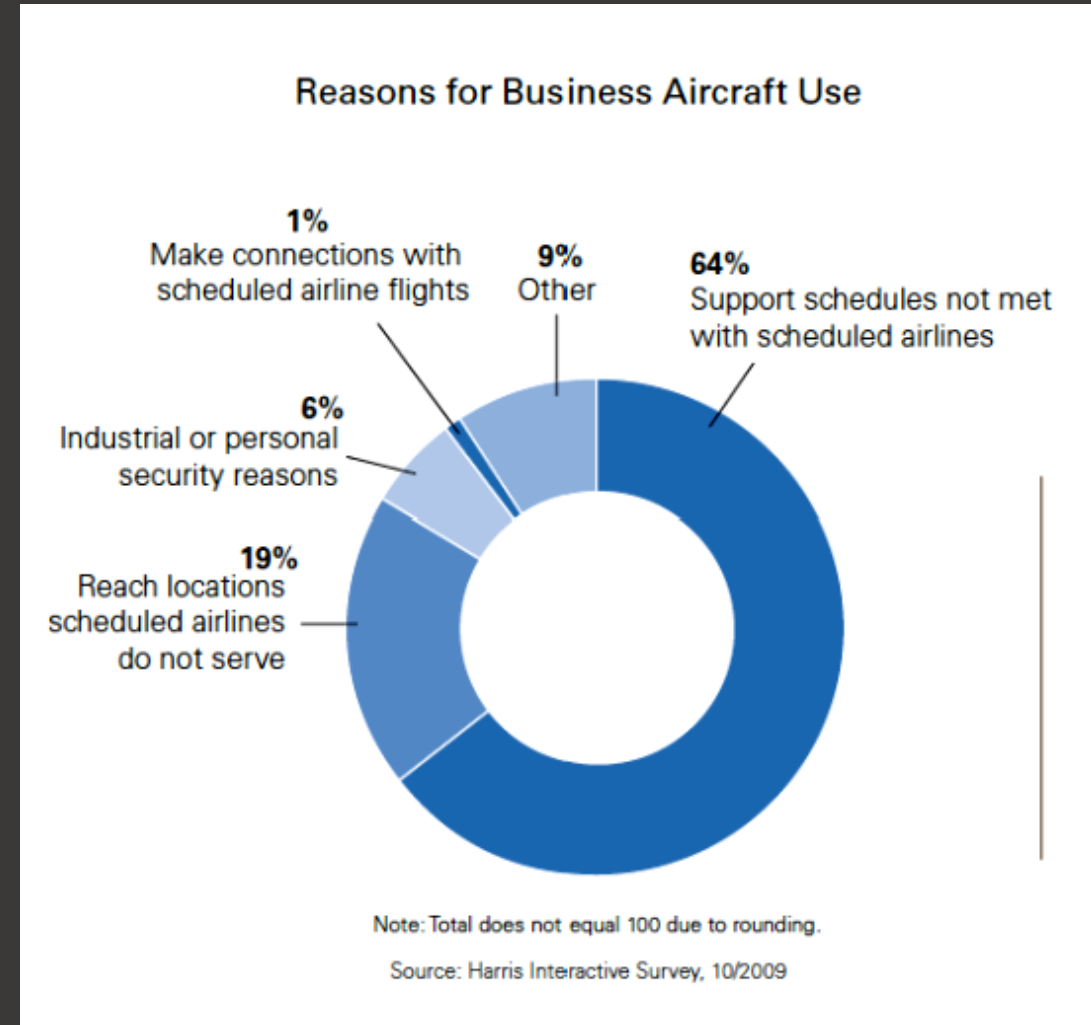
Major Domestic Markets

Million O-D passenger journeys (to, from and within)



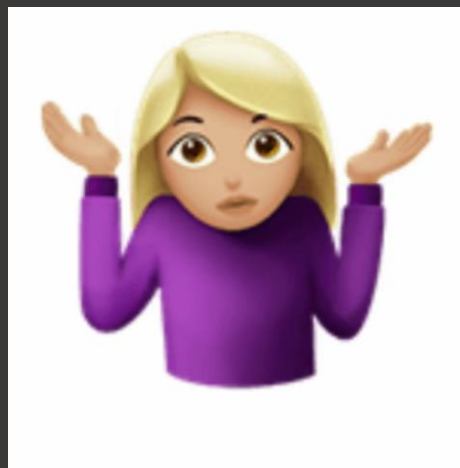
BizAv Operating Challenges vs Why We Fly

- Slot Competition
- Ramp Space
- Curfews
- Noise
- Worldwide, 204 airports are now designated as Level 3 slot-coordinated facilities, meaning they are effectively at full capacity for runway and parking availability.
- **The Asia-Pacific region has about 20 percent of the worlds slot coordinated airports, with 21 in China alone**



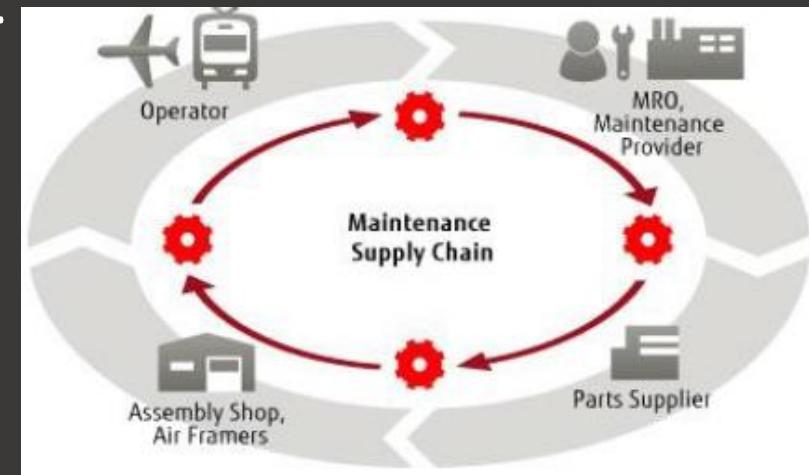
CHALLENGES, A simple sample with a lot of headaches

On a Thursday evening, you decide that you want to fly with your G550 from Hong Kong to Bangkok for a business dinner on a Friday afternoon, stay overnight in BKK and return to Hong Kong, leaving BKK at lunchtime. Ramp Space *What could go wrong?*



How do airports view business aviation?

- Connectivity is crucial for the strategic growth of every city
 - In Hong Kong, BA is covering more destinations from existing commercial network.
- At least 65/100 top listed HK companies utilize business aviation.
 - Capital, Technology, Ideas, Entrepreneurship, Jobs, Assets
- BA, is an important, albeit small, contributor to Local Economy.
 - Leasing & Financing, Charter Broker, MRO, Parts etc...



NO WAY that Airport do not like BA

The situation begs the question

Are business jets to be blamed for airport chaos, or is it scapegoating ?

What does the Future hold?



“Asia’s Smaller Hub Airports Are Spending \$1 Trillion on Tune-Ups”

*Story by Angus Whitley and Kyunghee Park,
Bloomberg - Jul 29, 2017*