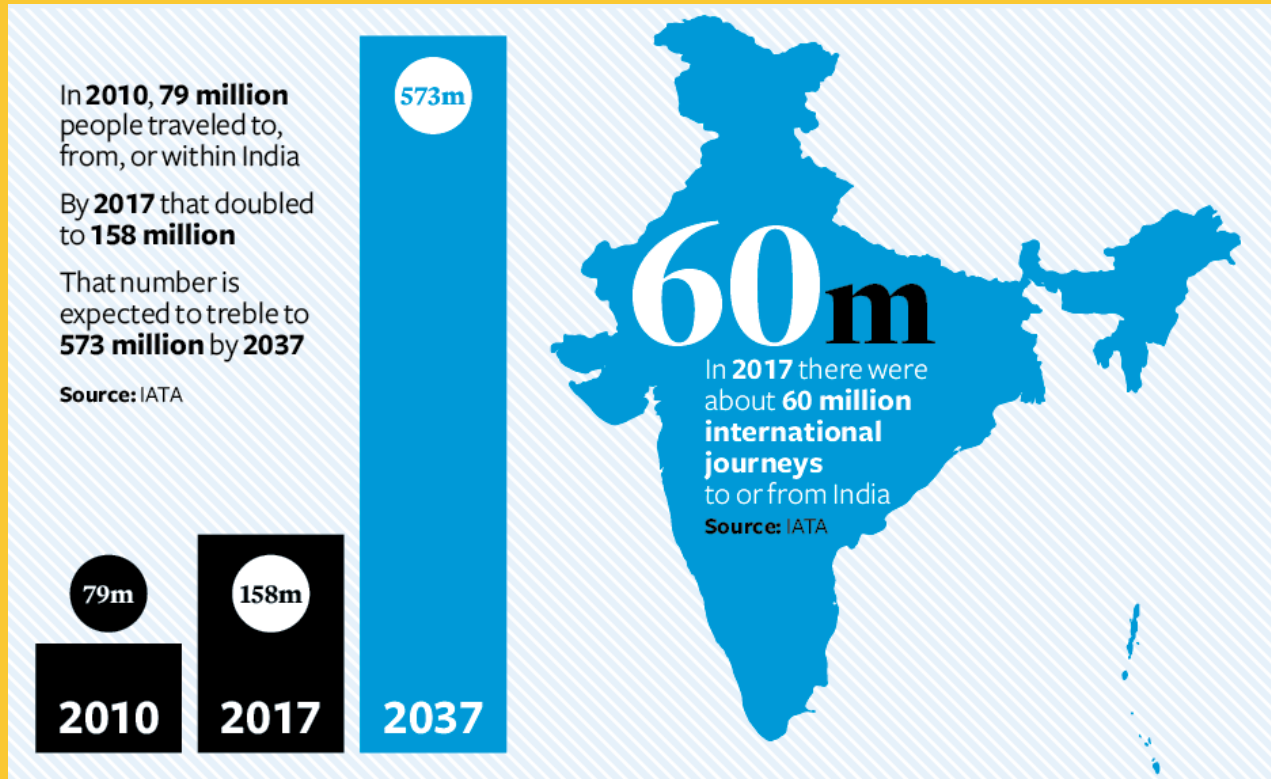


5th Annual Singapore Aviation Safety Seminar

Conrad Clifford
Regional Vice President
Asia Pacific

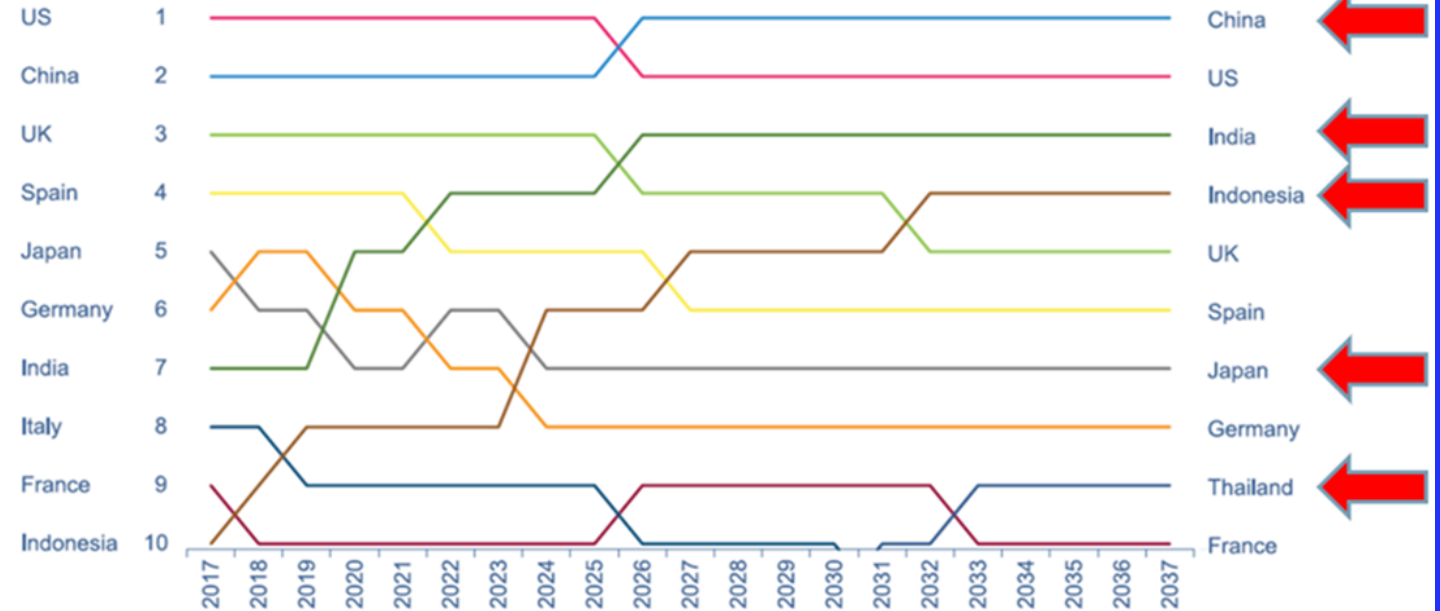


8.2 Billion Pax by 2037



Aviation's CoG Shifting Eastward

Top 10 air passenger markets 2017-37



ASPAC Airline Performance

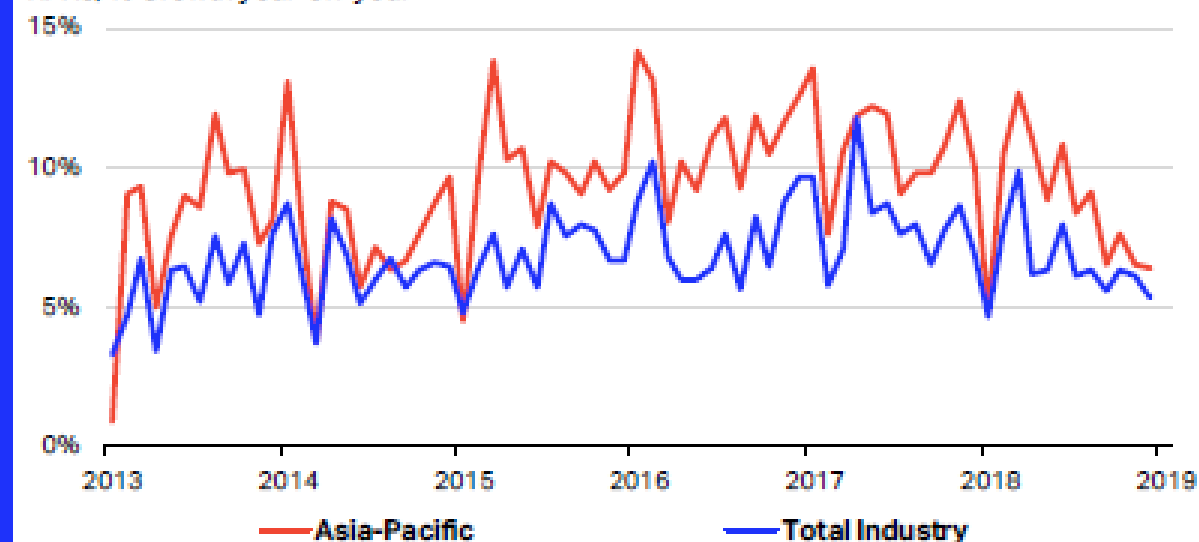


Revenue passenger kilometers (RPKs)

| % change on a yr ago | 2017 | Oct-18 | Nov-18 | Dec-18 |
|------------------------------------|------|--------|--------|--------|
| Region (registration basis) | | | | |
| Asia Pacific | 10.8 | 7.6 | 6.5 | 6.4 |
| World | 8.0 | 6.3 | 6.1 | 5.3 |
| Routes (segment basis) | | | | |
| India domestic | 17.5 | 15.2 | 13.2 | 10.0 |
| Japan domestic | 5.8 | 1.7 | 2.7 | 4.7 |
| Australia domestic | 0.4 | 1.3 | -0.7 | -1.8 |
| Asia - Europe | 10.5 | 7.5 | 7.6 | 6.7 |
| Within Asia | 11.4 | 6.3 | 6.1 | 6.2 |
| Asia - Nth America | 7.2 | 1.7 | 3.4 | 2.2 |
| Asia - Middle East | 7.0 | 5.9 | 4.7 | 1.4 |
| S/w Pacific - N/S America | 6.5 | 7.1 | 8.4 | 9.1 |
| Asia - Africa | 3.7 | 5.8 | 10.0 | 9.7 |

Source: IATA Statistics Note: historical data may be subject to revision

RPKs, % Growth year-on-year



Source: IATA Statistics

ASPAC Airline Performance



Airline operating (EBIT) margins*

| <i>% revenues</i> | 2016 | 2017 | 2017Q4 | 2018Q4 |
|-------------------|------|------|--------|--------|
| Asia Pacific | 7.4 | 5.5 | 11.6 | 9.5 |
| Industry | 8.5 | 7.5 | 9.4 | 8.2 |

Source: Airline Analyst * constant sample basis, not seasonally adjusted

Airline operating (EBIT) margins*

| <i>% revenues</i> | 2016 | 2017 | 2017Q4 | 2018Q4 |
|-------------------|------|------|--------|--------|
| Asia Pacific | 7.4 | 5.5 | 11.6 | 9.5 |
| Industry | 8.5 | 7.5 | 9.4 | 8.2 |

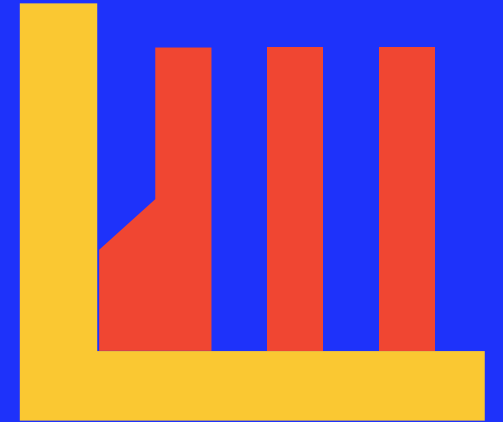
Source: Airline Analyst * constant sample basis, not seasonally adjusted

ASPAC Airline Performance

Passenger yields (US\$, excl. surcharges & ancillaries)

| <i>% change on a yr ago</i> | 2017 | Oct-18 | Nov-18 | Dec-18 |
|-----------------------------|------|--------|--------|--------|
| India domestic | -2.3 | -8.8 | -1.0 | 5.5 |
| Australia domestic | 5.5 | 4.0 | 2.0 | 2.0 |
| Asia - Europe | 1.9 | -2.7 | -1.0 | -3.4 |
| Within Asia | -5.6 | -3.3 | -4.5 | -6.2 |
| Asia - Nth America | -3.2 | 4.1 | 4.4 | 3.9 |
| Asia - Middle East | -3.5 | -4.9 | -1.9 | 1.5 |
| Asia - Sth America | -4.2 | -3.0 | -3.0 | -2.1 |
| Asia - Africa | -0.1 | 1.7 | 0.8 | -1.8 |

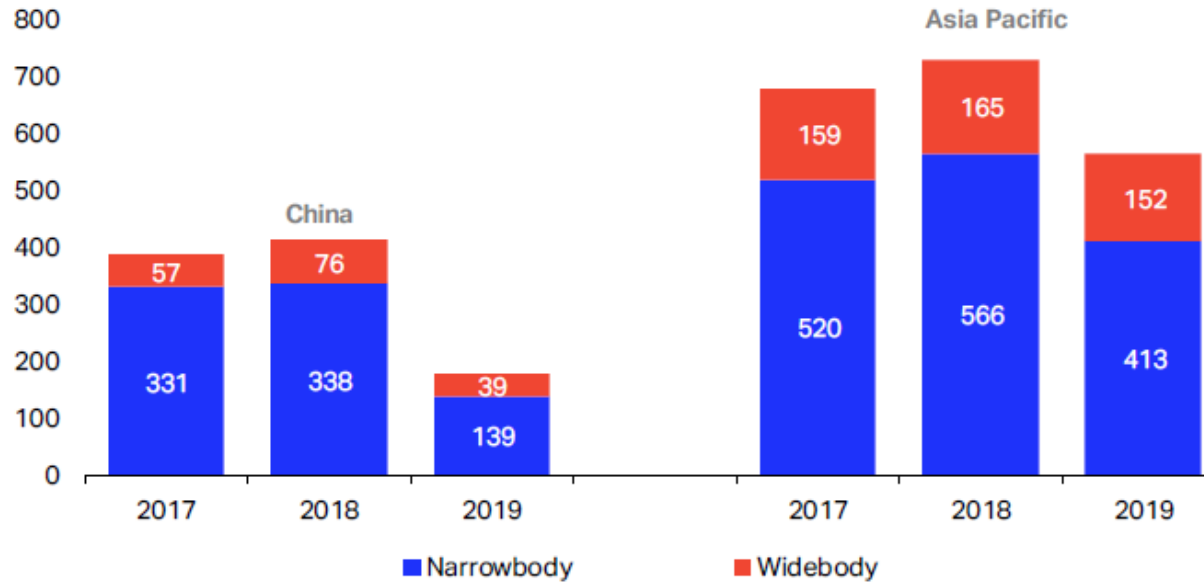
Source: IATA PaxIS Note: historical data may be subject to revision



ASPAC Airline Performance

Aircraft deliveries to China & the Asia Pacific (1Q19 data)

deliveries made & due

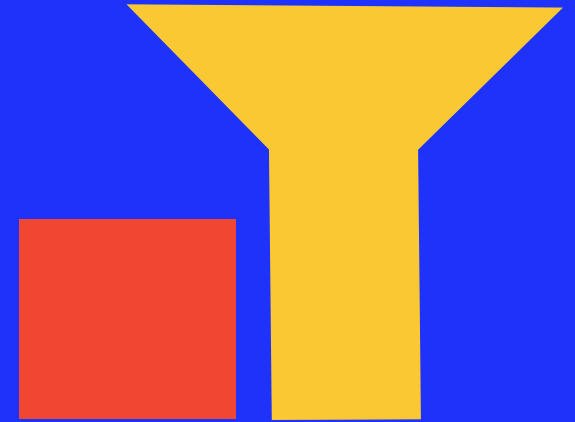
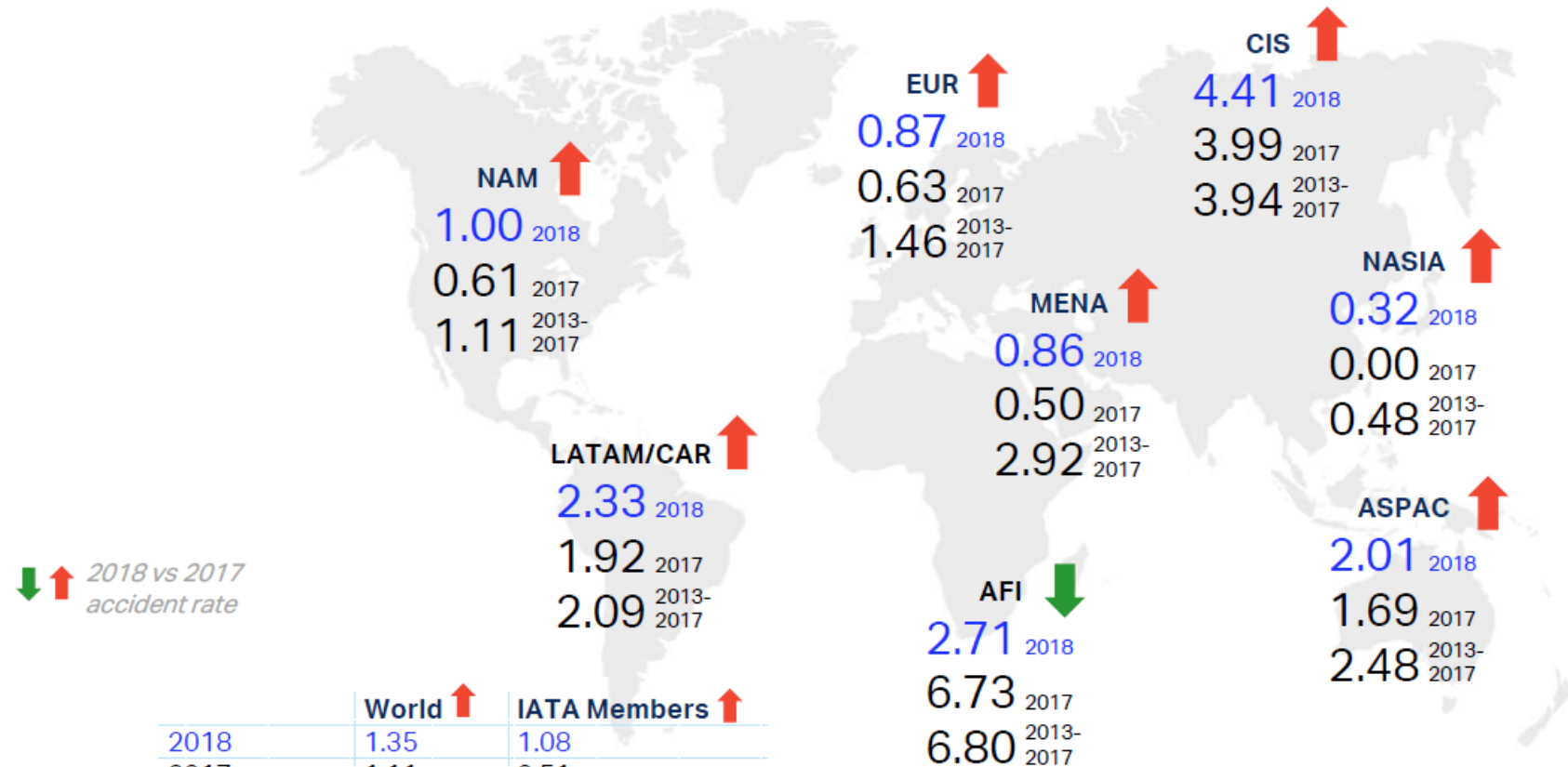


Source: Ascend



2018 Accident Rate

All Accident Rate per Region of Operator as 1st January 2019



Thank you

Conrad Clifford

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