

ASIA - PACIFIC Market Overview

Global Market Forecast 2022-2041

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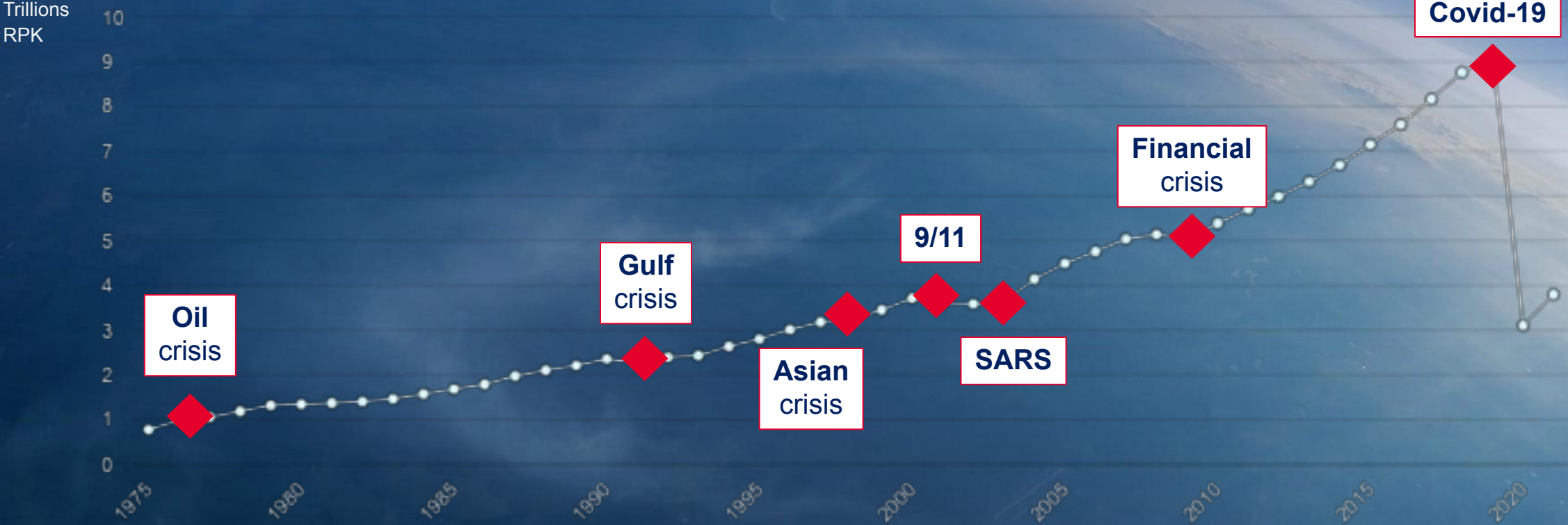
Fleet Forecast

1 Key Insights

Global Market Forecast

Air travel growth since 1975

RPK = Revenue Passenger Kilometre
Source: ICAO, Airbus GMF 2019
Full year IATA 2020 actuals



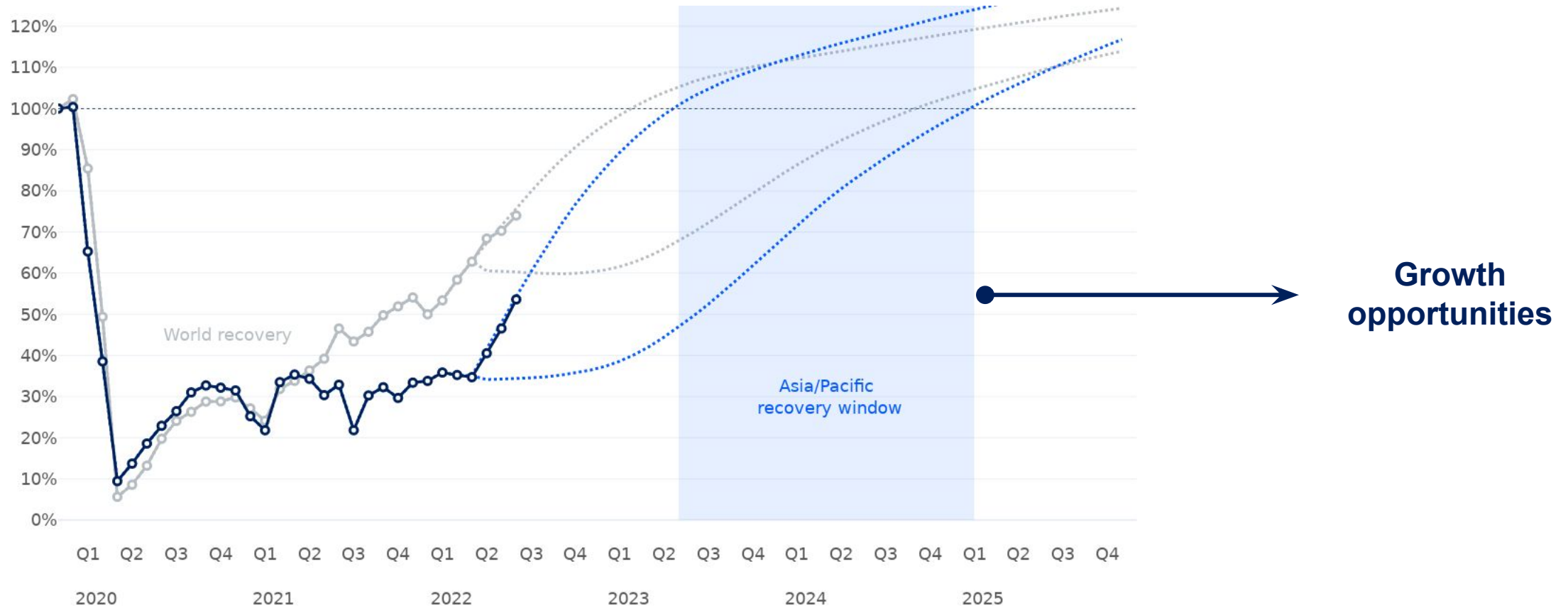
Air transport has always demonstrated its resilience to external shocks

Asia/Pacific air traffic recovery expected between Q2 2023 and Q1 2025

World air traffic recovery between mid 2023 and the end of 2024

Source: OAG, FR24, Sabre, IATA, Airbus GMF

Asia/Pacific air traffic - excl. Russia (RPK versus equivalent month in 2019)



Asia-Pacific – Key insights

Economy

3.6% real GDP growth*

Above the 2.6% World yearly average

Traffic

5.0% pax traffic growth*

5.1% Intra-regional & Domestic

4.6% Inter-regional

Fleet

17,580 new deliveries**

14,560 typically Single-Aisle

3,020 typically WideBody

* 2019-2041 CAGR

** cumulative 20 years deliveries

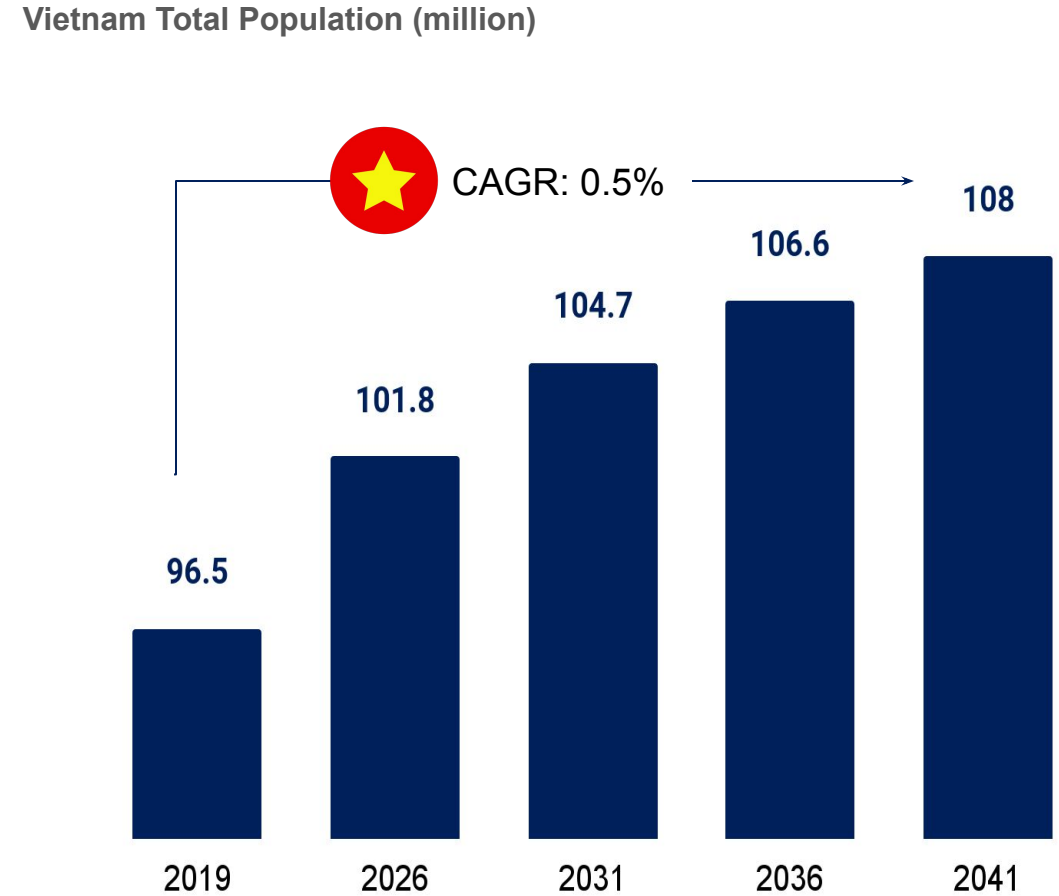
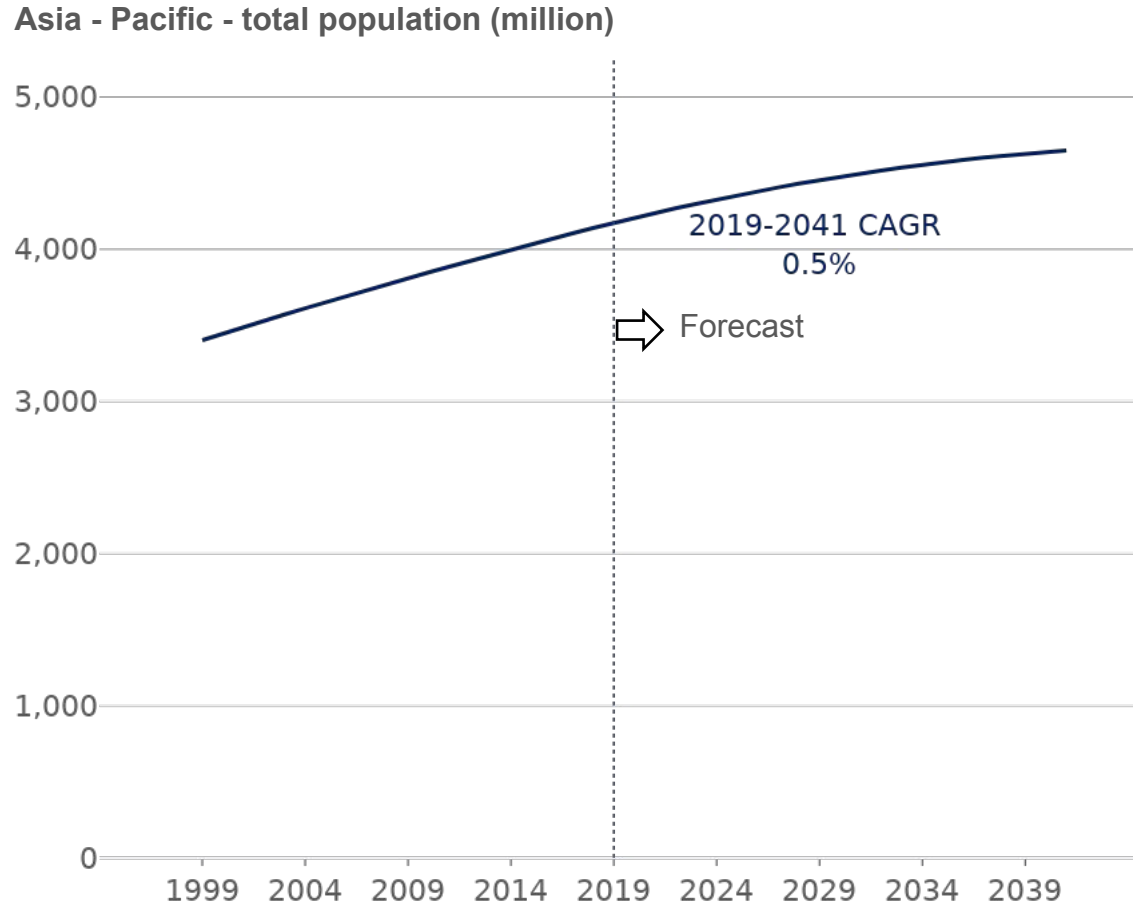
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Socio & Macro Economy

Global Market Forecast

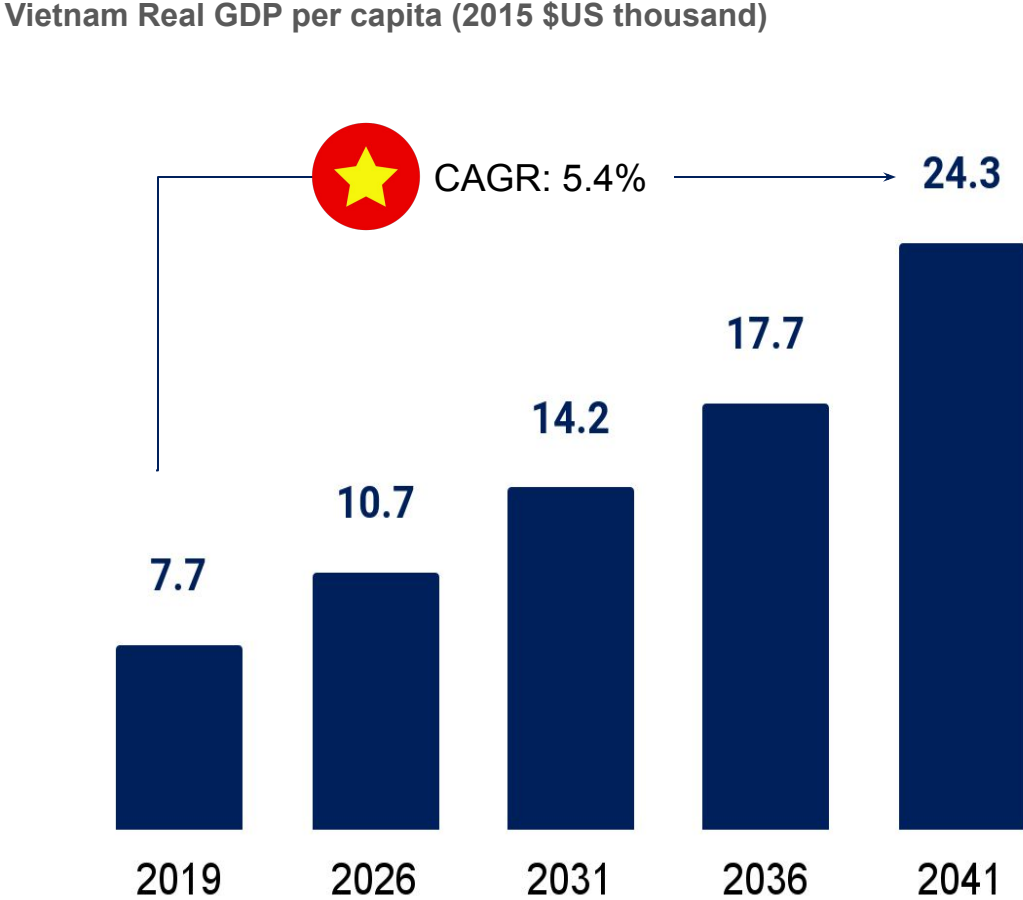
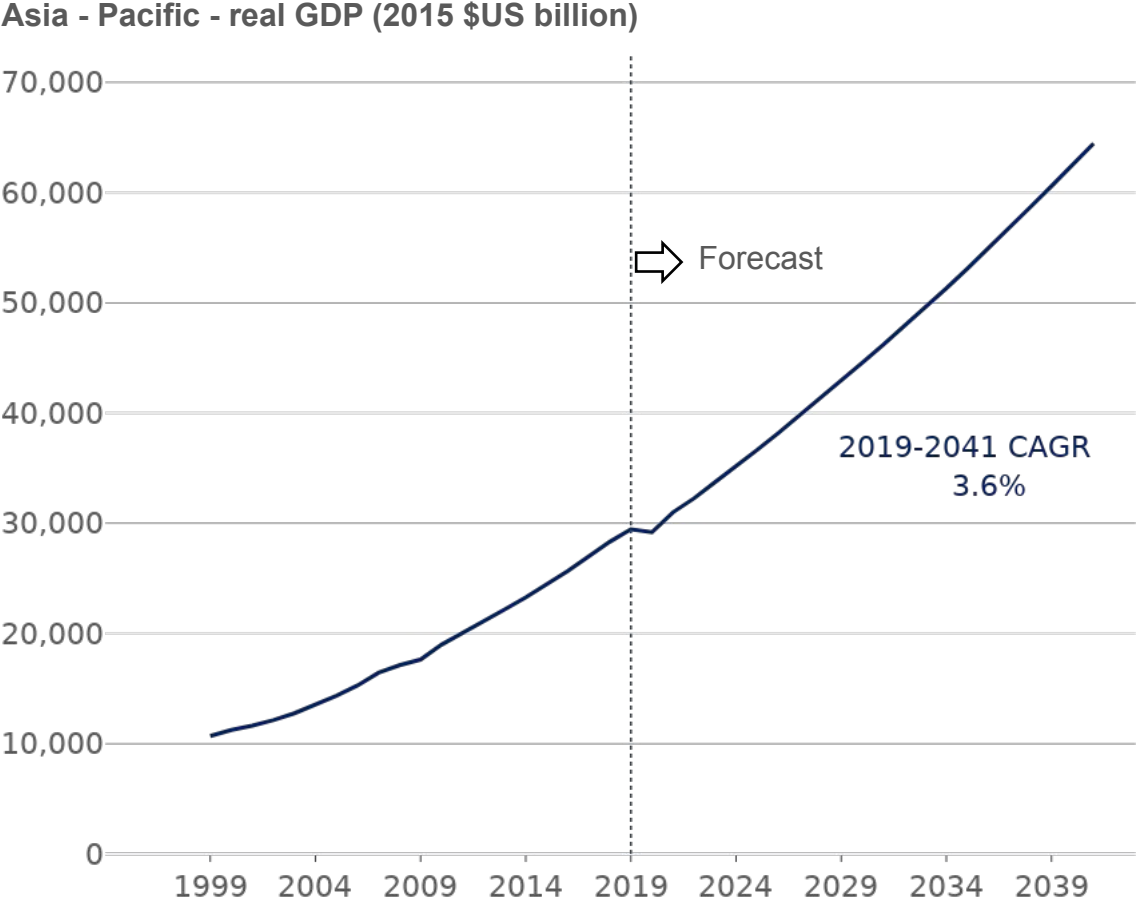
The population in Asia - Pacific to increase by 1.1 from 2019 to 2041

Source: IHS Markit, Airbus GMF 2022



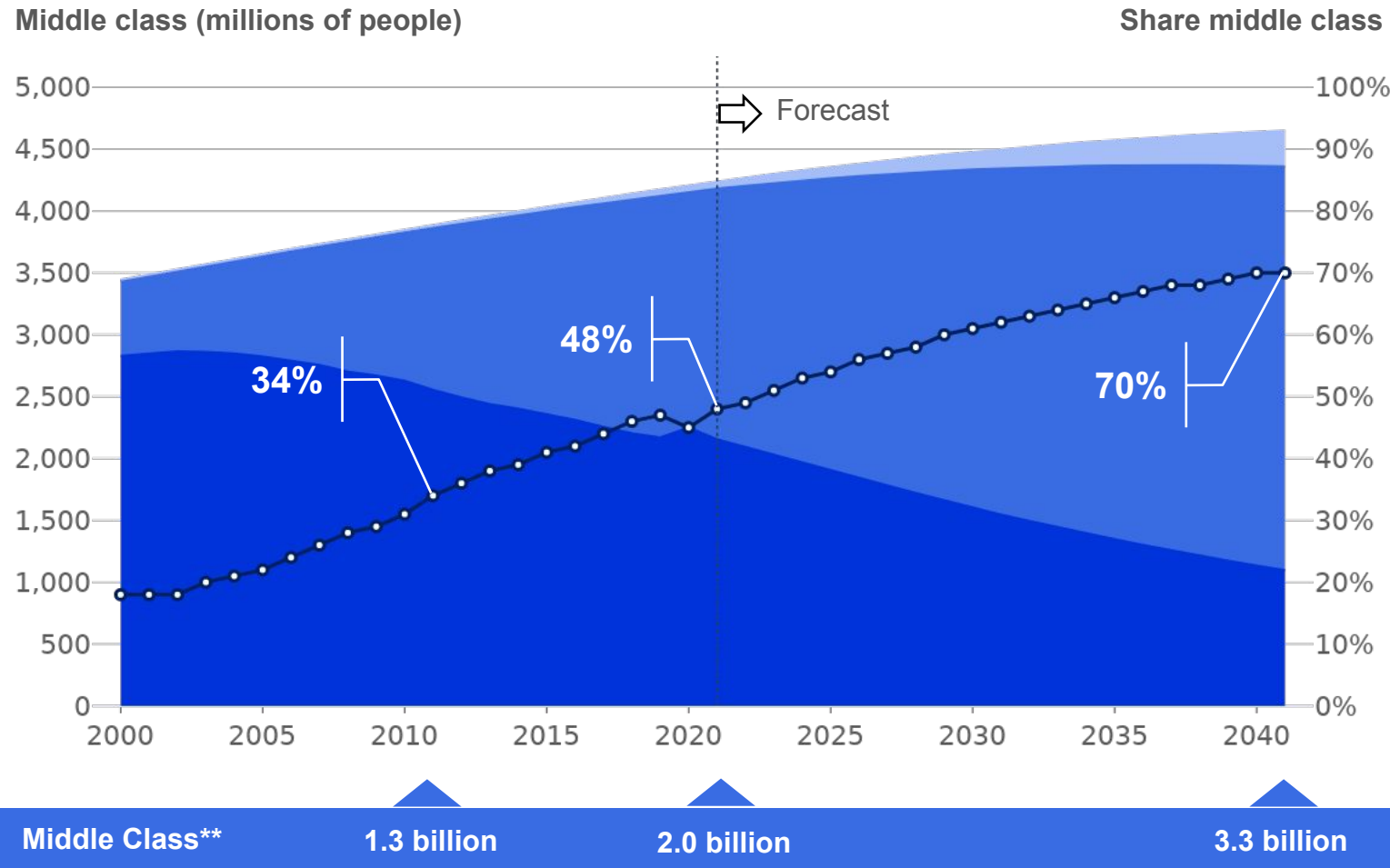
GDP in Asia - Pacific to increase by 2.2 from 2019 to 2041

Source: IHS Markit, Airbus GMF 2022



Asia - Pacific middle class expected to grow to 3.3 billion people by 2041

Source: Oxford Economics, Airbus



Asia - Pacific Middle Class expected to represent 70% of the population by 2041

- Upper Class***
- Middle Class**
- Lower Class*
- % Middle Class

* Households with yearly income between \$0 and \$20,000 at PPP in constant 2015 prices

** Households with yearly income between \$20,000 and \$150,000 at PPP in constant 2015 prices

*** Households with yearly income above \$150,000 at PPP in constant 2015 prices

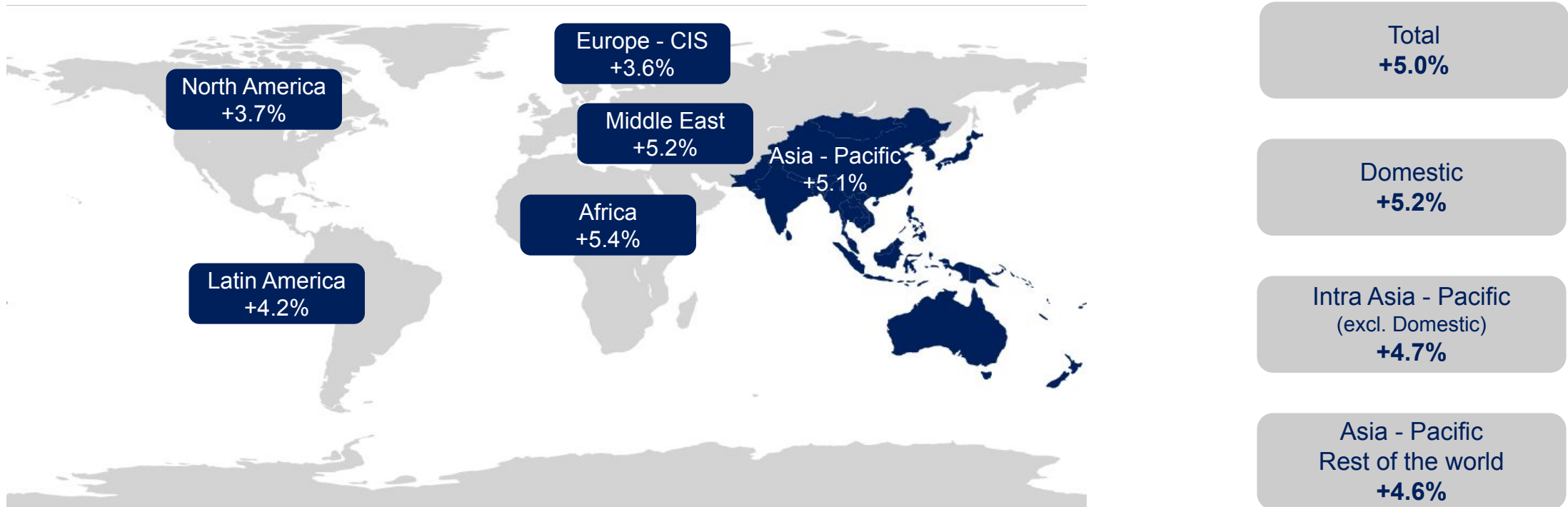
3 Traffic Forecast

Global Market Forecast

O&D* Passenger Traffic in Asia - Pacific to increase by 2.9 over 2019-2041

*Origin Destination
Source: Airbus GMF 2022

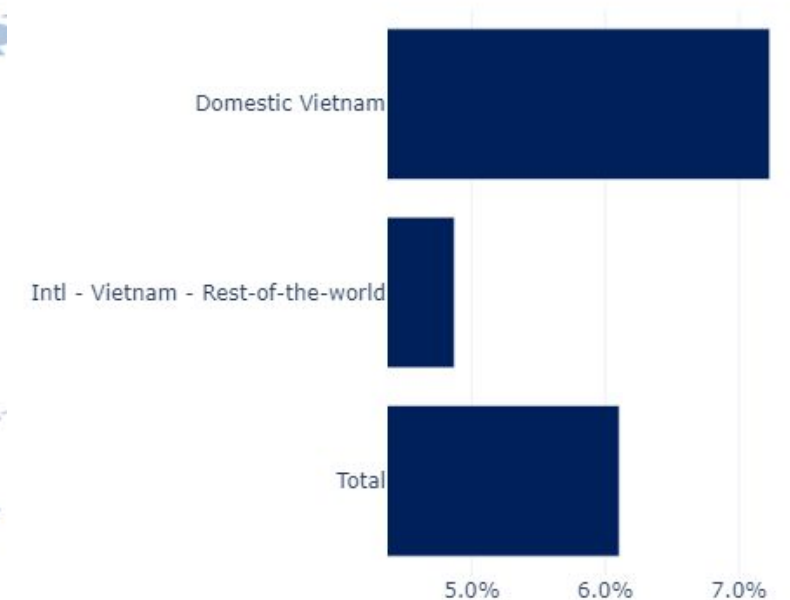
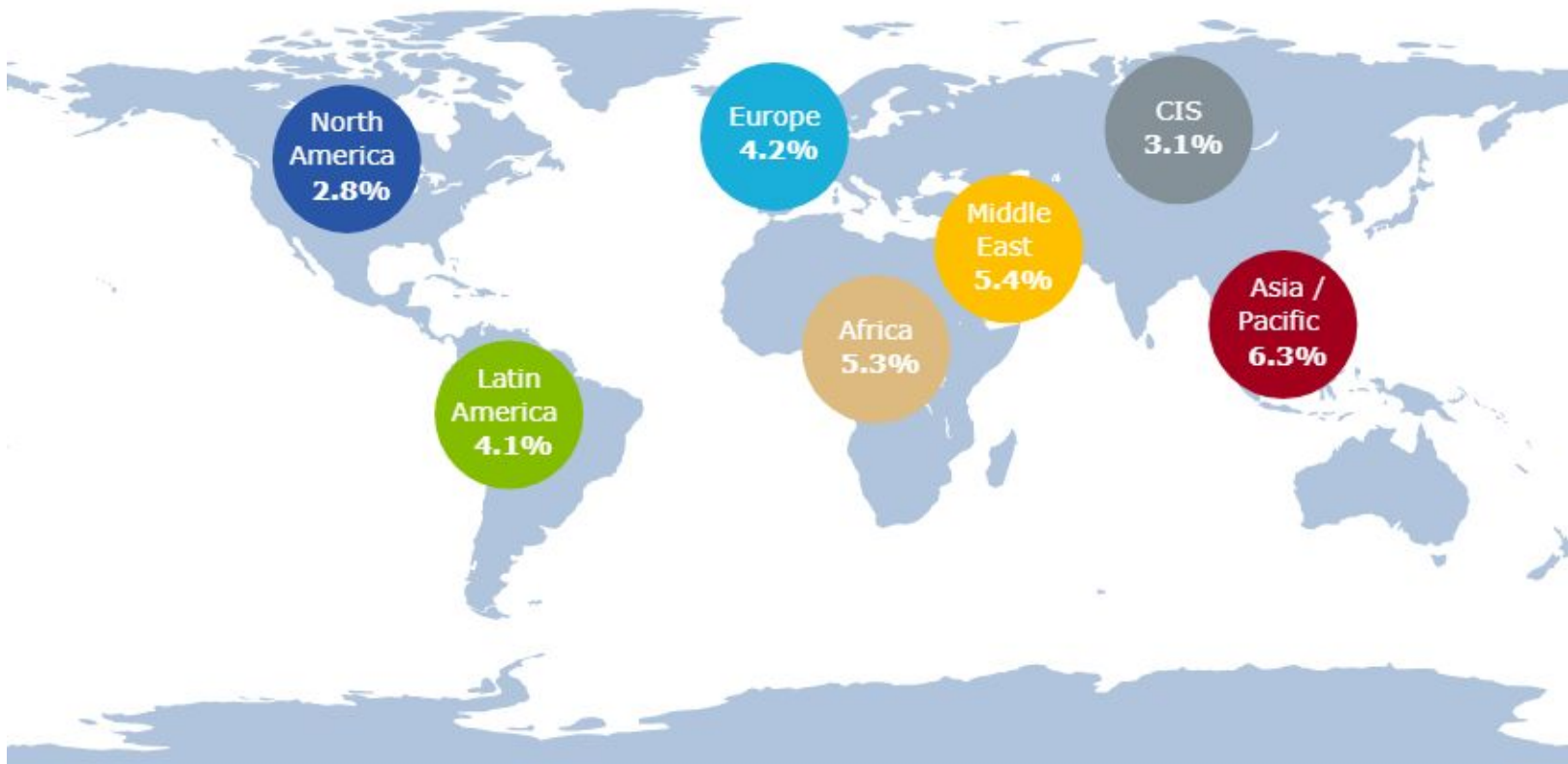
Origin-Destination passenger traffic forecast from/to/within Asia - Pacific - 2019-2041 CAGR



O&D* Passenger Traffic in Vietnam growing faster than APAC average

*Origin Destination
Source: Airbus GMF 2022

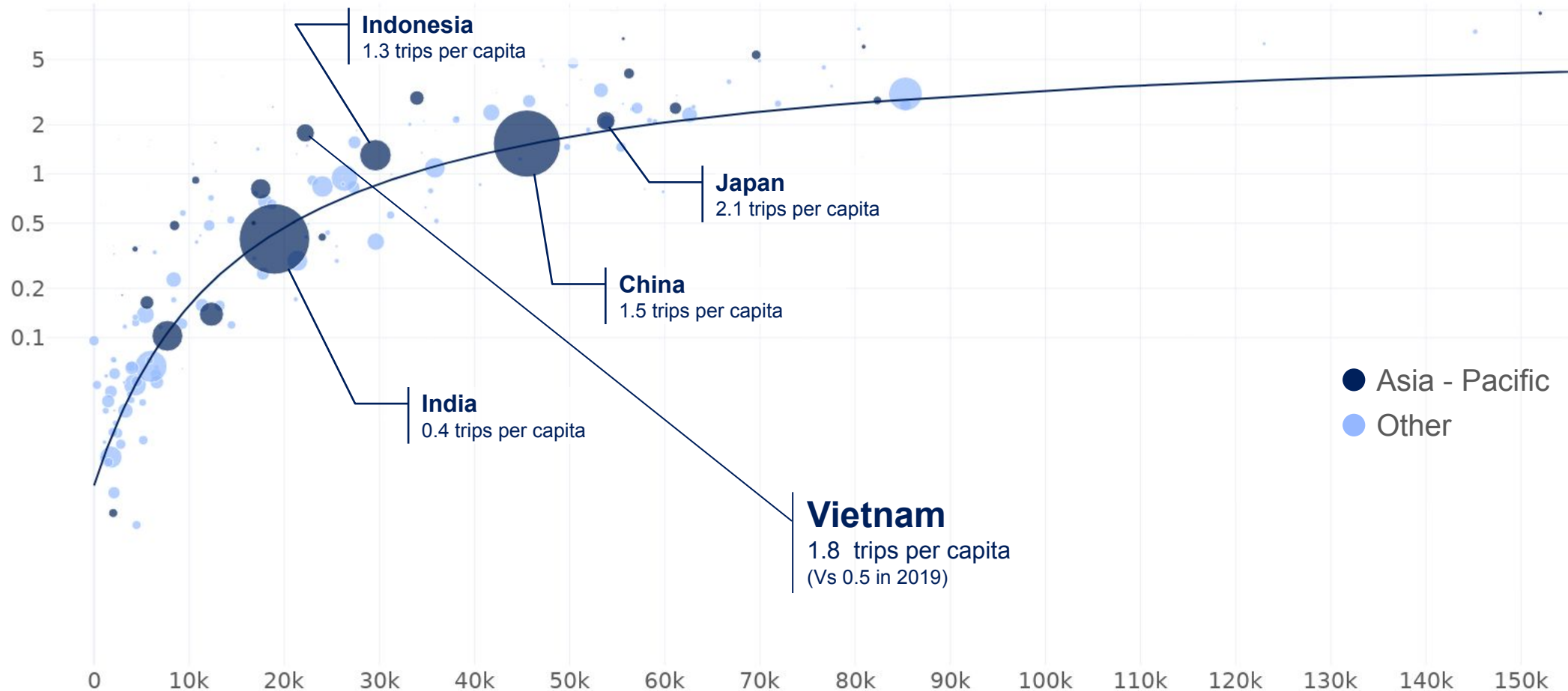
Origin-Destination passenger traffic forecast from/to/within Vietnam by big region 2019-2041 CAGR



In 2041, 1.04 yearly trips per capita are expected in Asia - Pacific countries VS 0.39 yearly trips in 2019

Source: Airbus GMF 2022

2041 yearly trips vs GDP per capita (2015 \$US at Purchasing Power Parity) (bubble size proportional to country size)

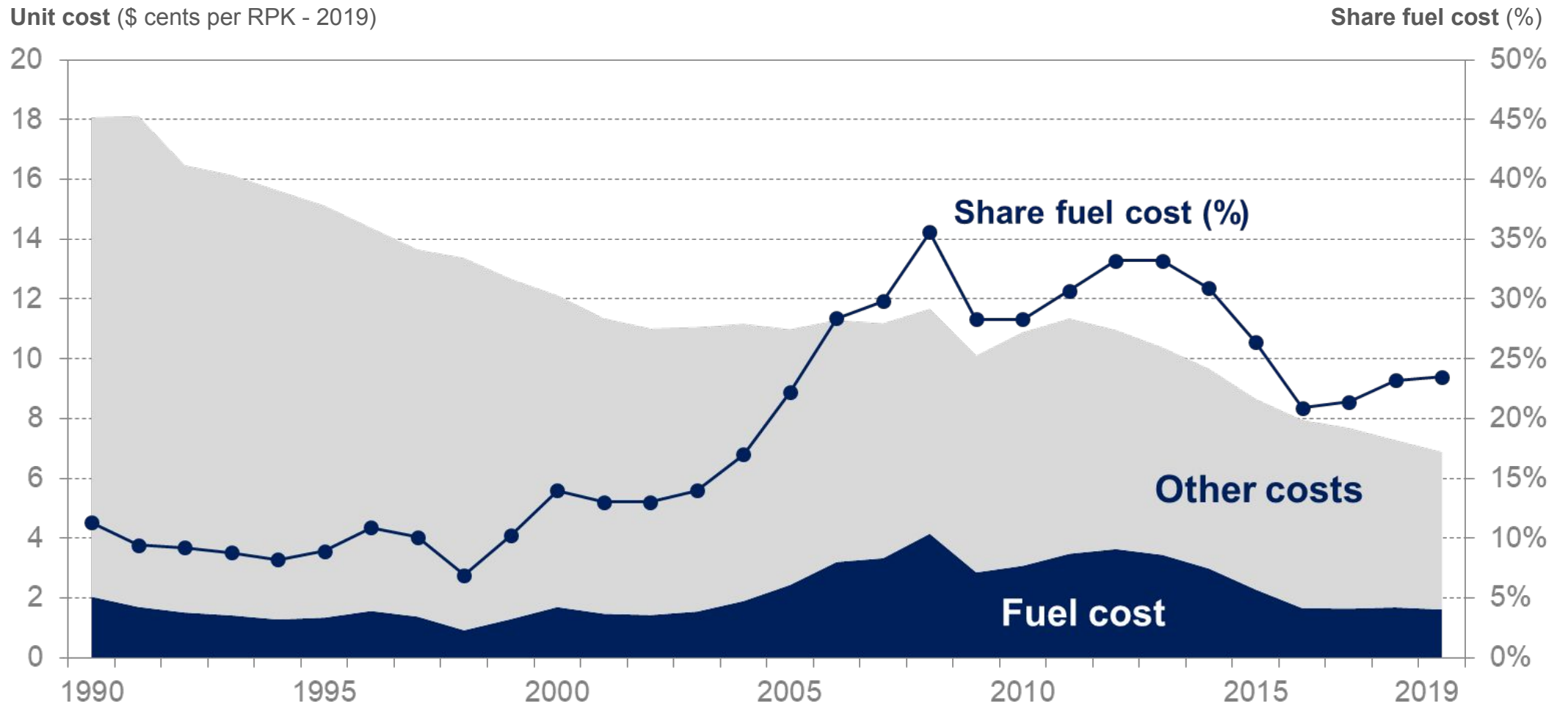


4 Fleet Forecast

Global Market Forecast

Share of energy cost in airline operating costs is growing

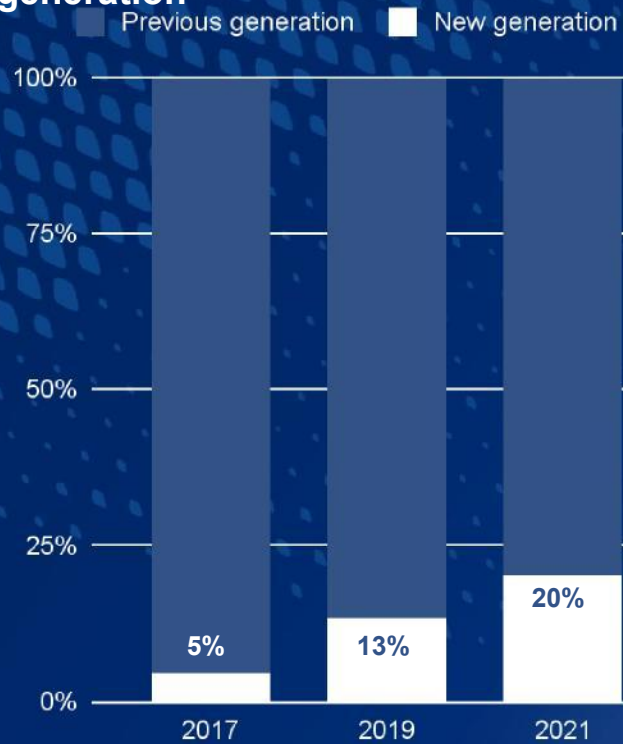
Source: IATA, Airbus GMF



Airlines require the latest, most efficient and lowest-emission aircraft

Global Market Forecast
2022

% of in-service fleet by aircraft generation



Fleet modernization:
A strategic hedge against high energy costs
80% of fleet not yet latest generation

Airbus product line delivers 20 - 40% fuel burn reduction

End of April 2023

A320 FAMILY



Backlog:
6,034 aircraft



A220

Backlog:
523 aircraft

Single-Aisle

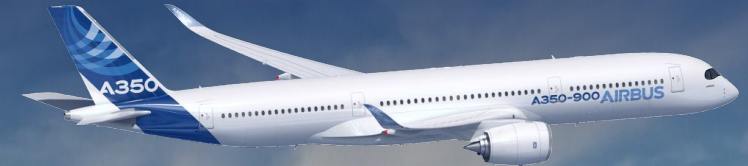
A350F



Backlog:
39 aircraft

Freighter

A350



Backlog:
398 aircraft

A330neo



Backlog: 190 aircraft

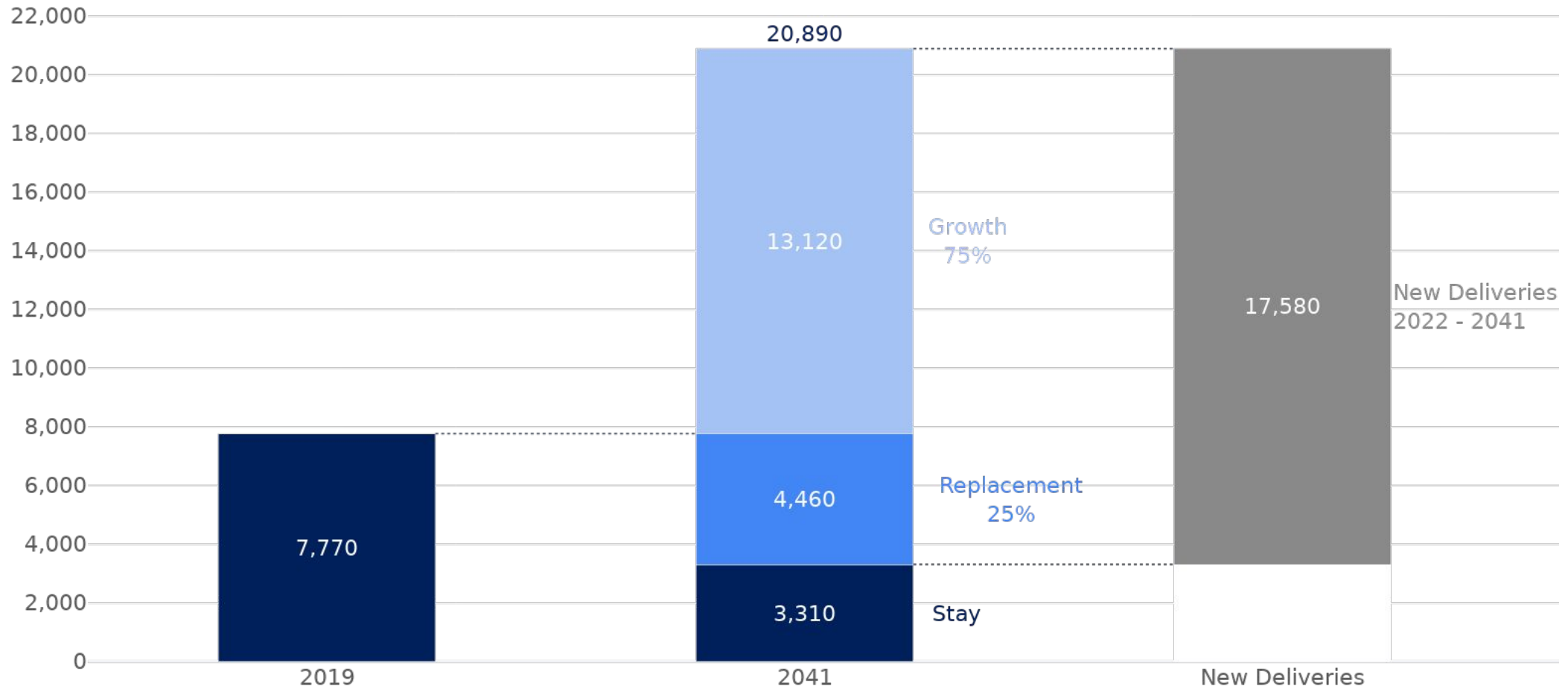
Widebody

AIRBUS

The Asia - Pacific airlines fleet to increase by 2.7 over 2019-2041

Source: Airbus GMF 2022 Passenger aircraft (≥ 100 seats) | Jet freight aircraft (>10 tons)

Asia - Pacific airlines – passenger and freighter aircraft – fleet in service

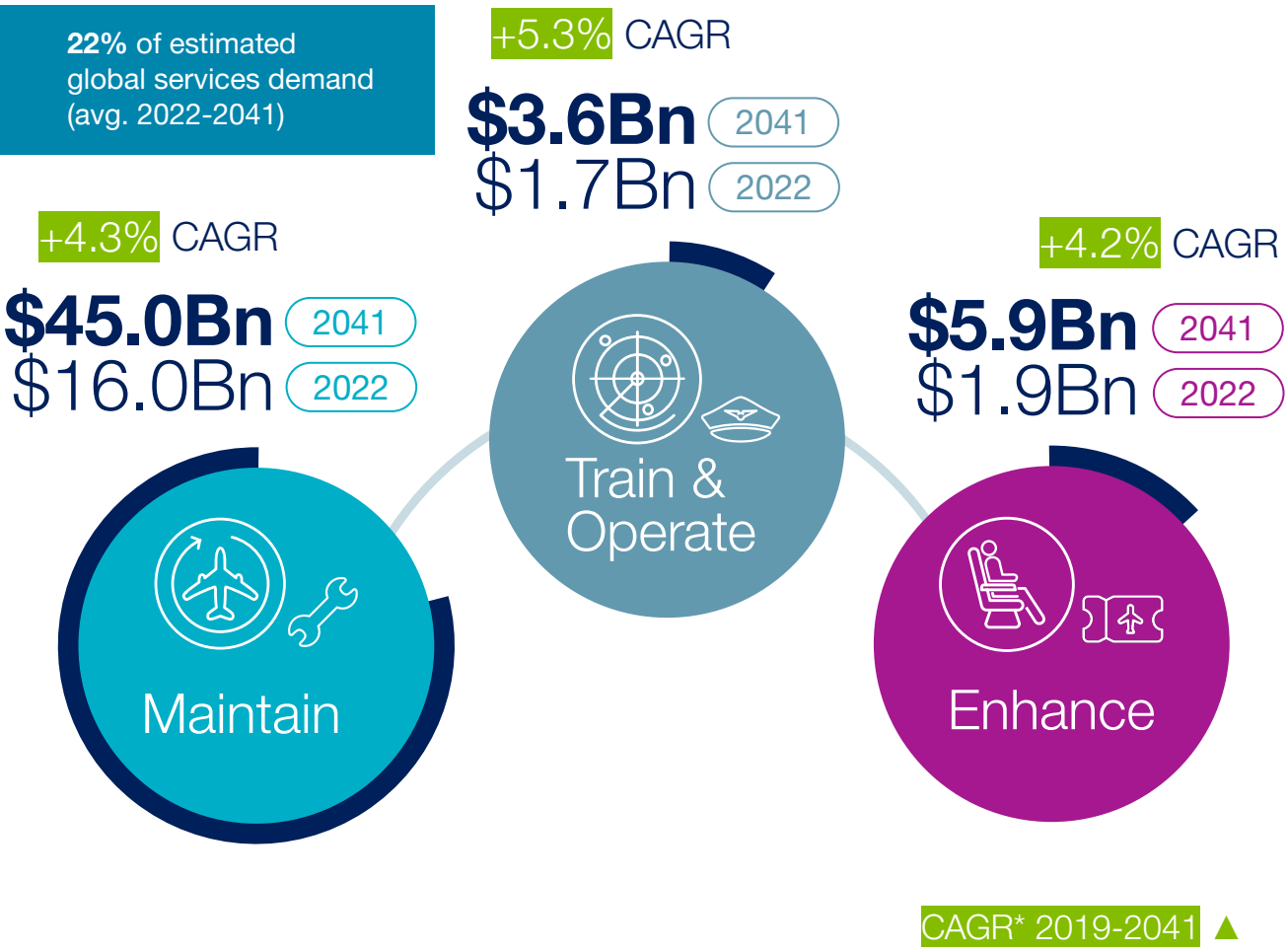


Asia-Pacific & South Asia**

GSF 2022 ▷ 2041

Regional Forecast

Asia-Pacific** showcases a robust growth, taking its position as the world's leading market for services



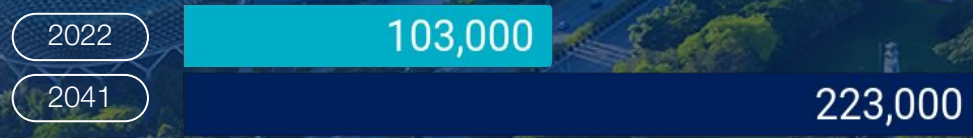
131,000
new pilots



144,000
new technicians



208,000
new cabin crews



*CAGR: Compound Annual Growth Rate
**APAC excluding China

Passenger aircraft above 100 seats & freighters with a payload above 10t

Thank you!

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