



Challenges in Expanding the Network in the Asia-Pacific Region

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Executive Vice President

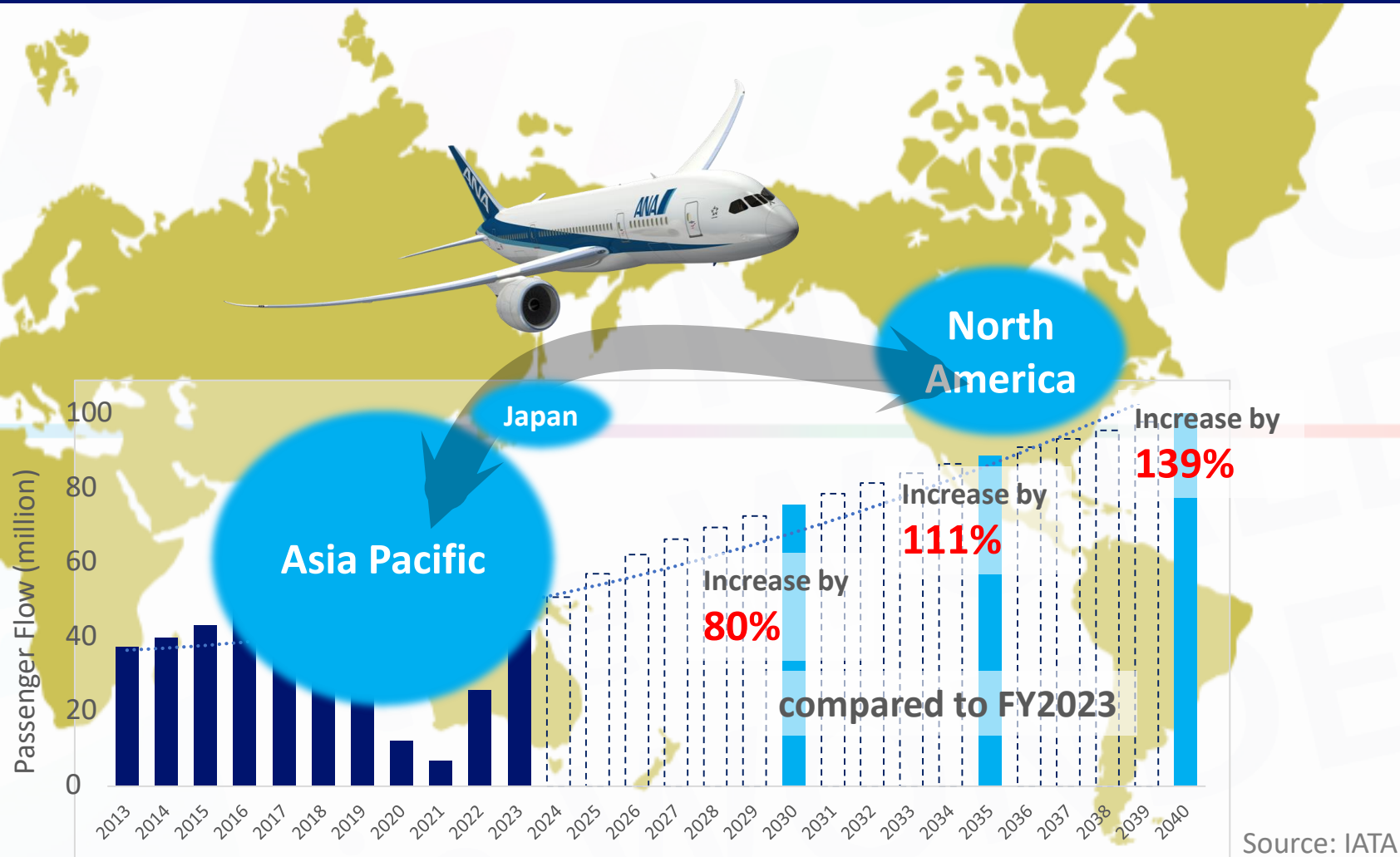
Industrial & Governmental Relations, GX

All Nippon Airways Co., Ltd

March 26th, 2025

Japan's strategic importance and the role of aviation

Aviation delivers substantial and widespread social benefits by providing connectivity.



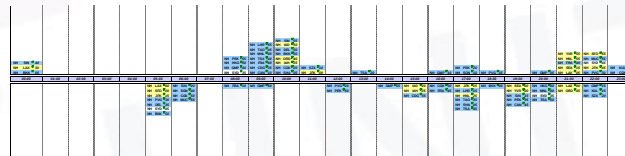
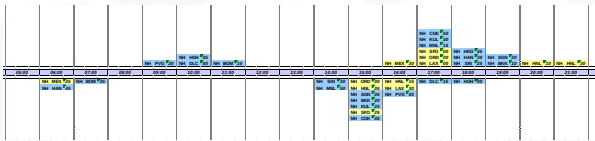
**Further growth opportunities
between Asia Pacific & North America**

Global Hub Airports & Global Hub Airline

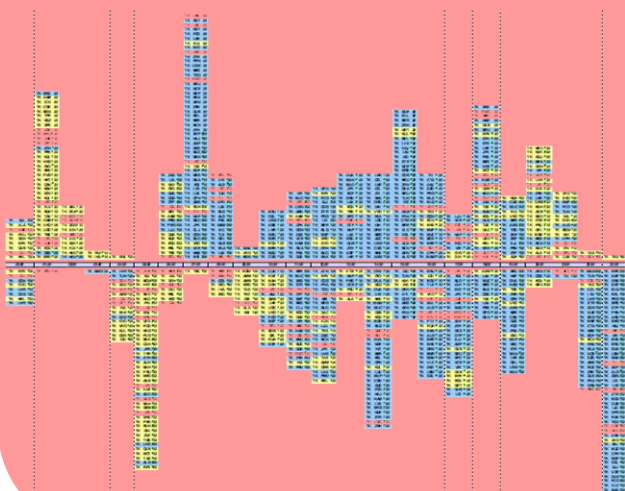
ANA aims to become “Global Hub Airline”



HANEDA
Japan Airport Terminal

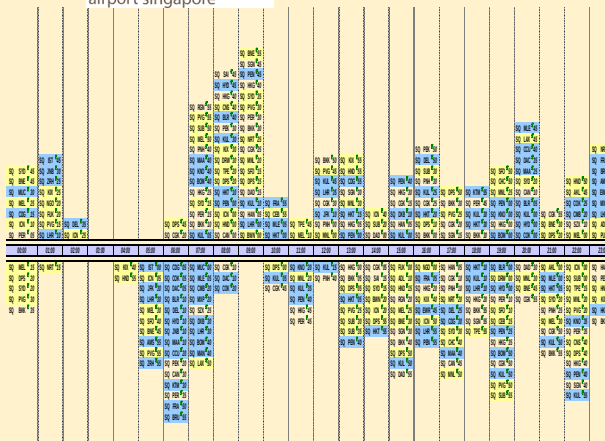


Istanbul Airport   **TURKISH AIRLINES**



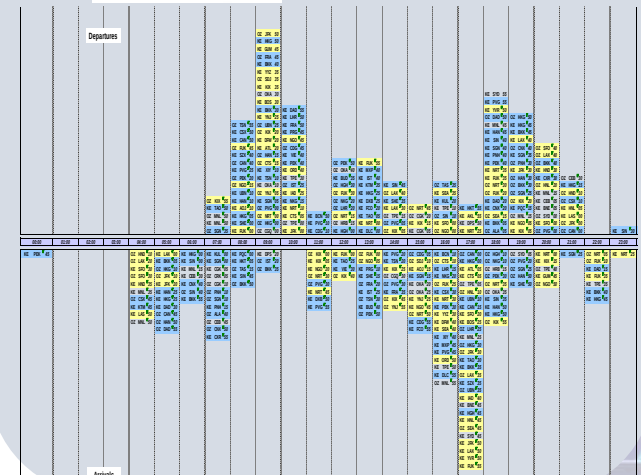

CHANGI
airport singapore

SINGAPORE AIRLINES




Incheon Airport

 **KOREAN AIR**
 **ASIANA AIRLINES**

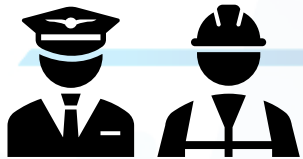


Triple Barriers to growth in Japan's airline industry



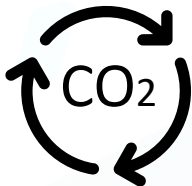
Aircraft

On-time delivery of aircraft in an unstable supply chain environment



Shortage of aviation personnel

17 % less working population expected in Japan in 2040 / **Mass retirement** of pilots and mechanics in 10 years



Level playing field for Decarbonization

Double burden on flights subject to CORSIA due to **EU SAF Mandate** / Potential application of the EU-ETS to international flights after 2026

Current actions and expectations for further collaborative initiatives

Aircraft

- ✓ **77 new aircrafts** to expand international network

B787-9



- ✓ U.S. Government Support for a Safe, Stable, and Strong Aircraft Manufacturing Industry
- ✓ International cooperation for supply chain recovery

Shortage of aviation personnel

- ✓ Process **automation by new technologies**



- ✓ Collaboration on DX and new technology development
- ✓ Sharing of best practices
- ✓ Maximizing the Potential of Senior Pilots in International Aviation

Decarbonization

- ✓ Leadership role to **reduce carbon footprints**



- ✓ Single set of international aviation decarbonization rules under ICAO
- ✓ Promotion of diverse low-carbon fuel options (e.g., LCAF)