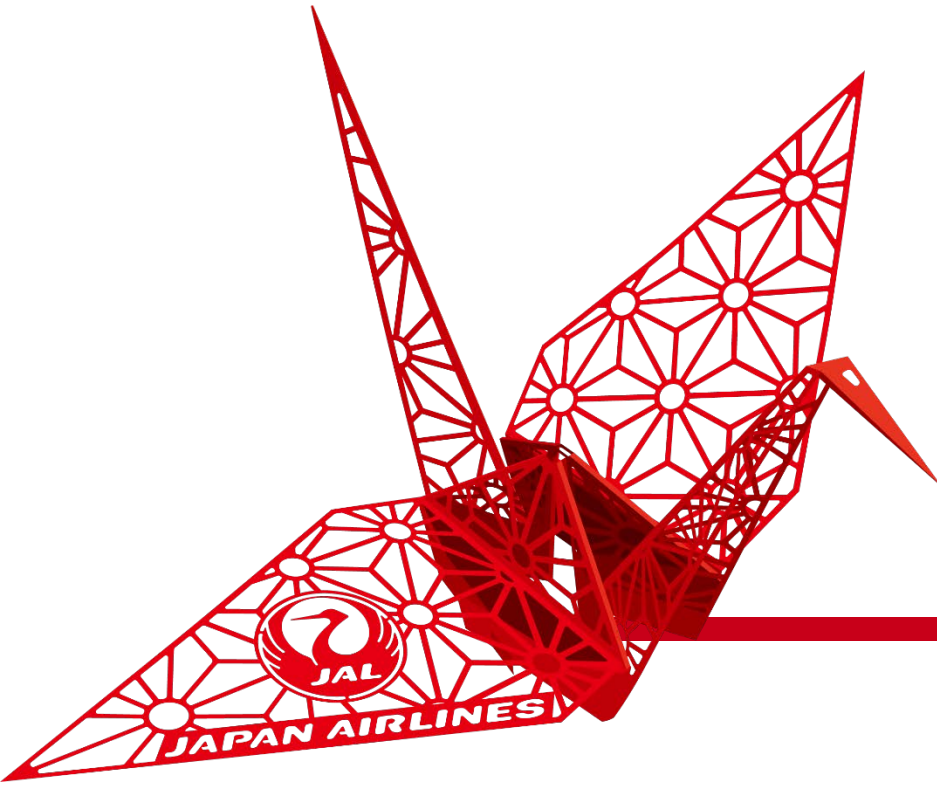




The Future of Civil Aviation in the Asia Pacific Region

October 8th, 2019

Tadao NISHIO

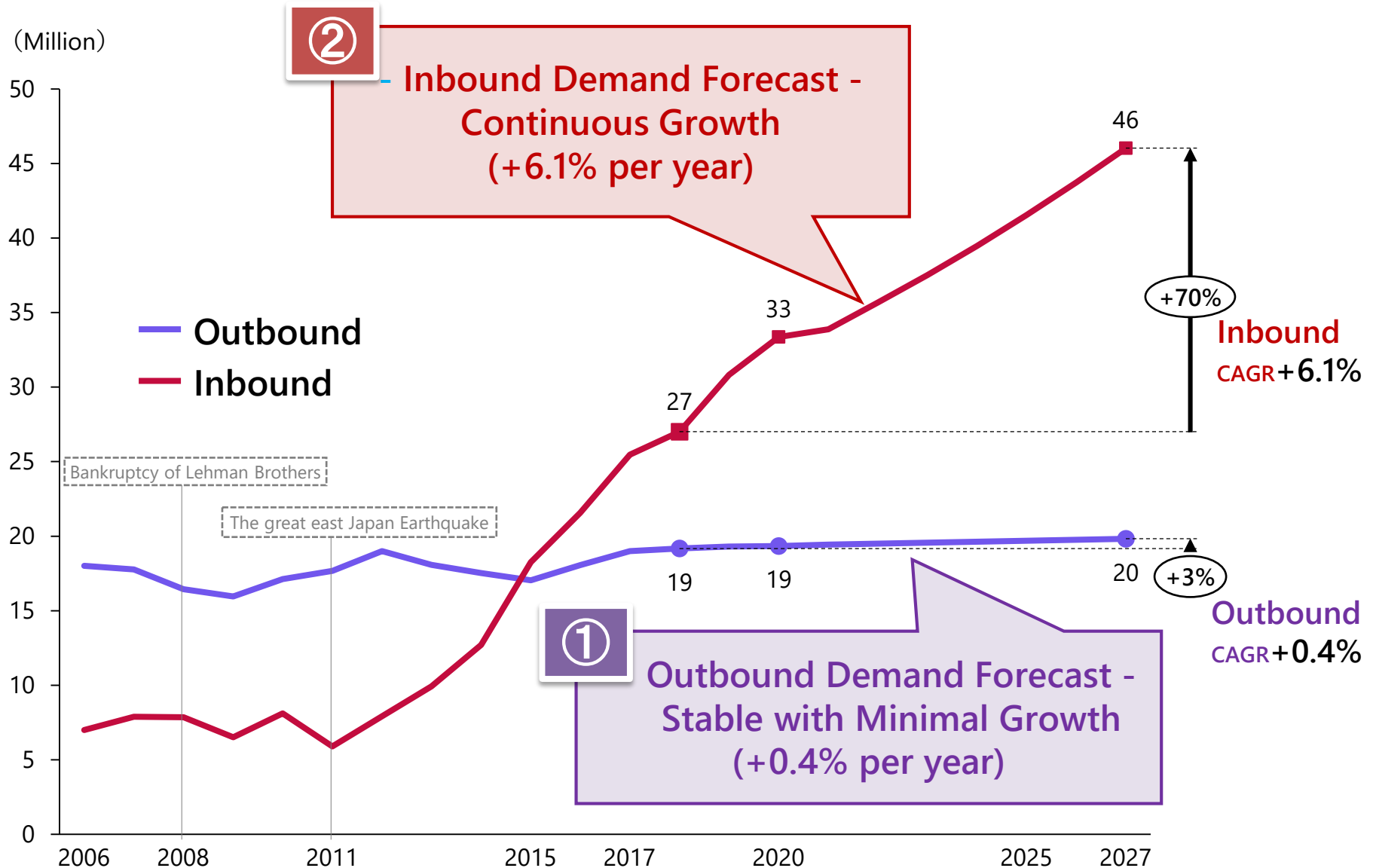
Managing Executive Officer
Corporate Strategy & Planning



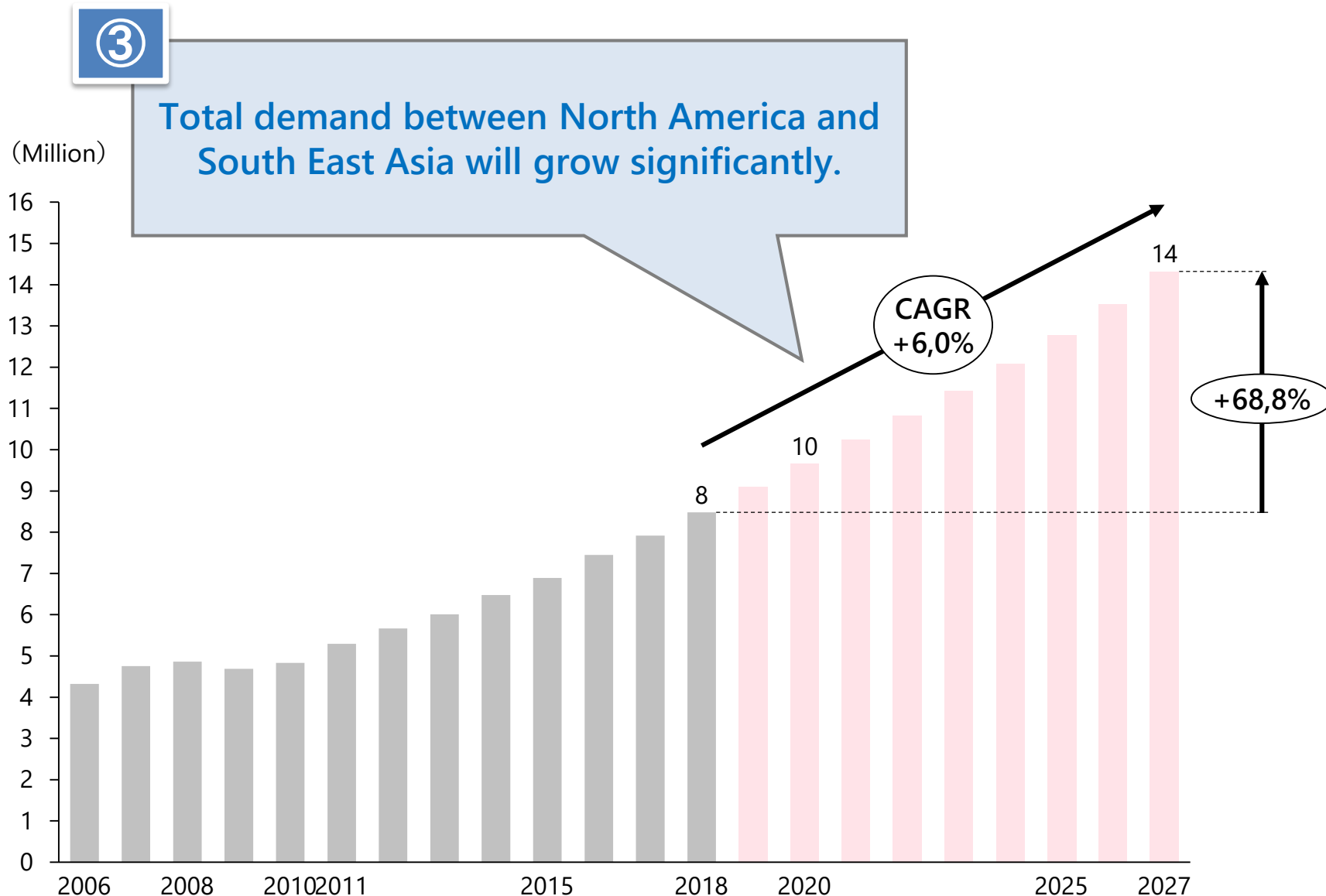
JAPAN AIRLINES

Air Passenger Traffic Demand in Japan

Air Passenger Traffic Demand in Japan



Forecasting Air Passenger Traffic Demand between South East Asia and North America



JAL Strategy

- ① Haneda & Narita Airport
- ② Global Network
- ③ Corporate Portfolio
- ④ Narita Airport Hub

① Haneda & Narita

Strategy of Airports in Tokyo (HND/NRT)



Haneda

Narita

Slot Growth

+50FLT/DAY

TTL+100FLT/DAY

+50FLT/DAY

Network Strategy

- ① Business Demand (High Yield)
- ② Point to Point Service
- ③ Inbound Passenger to Japan Domestic Areas 200Flights/DAY

- ① Strengthen Network Strategy through partnerships and JL Operated Flights
- ② Transit between South East Asia and North America
- ③ Increase Inbound Demand utilizing Jetstar Japan
- ④ Loung haul LCC

2027 JAL Target

Number of Destinations

402 Cities → 500 Cities

Ratio of International Passengers

Passenger

46%
(FY2018)

60%
(in 10 years)

Revenue

36%
(FY2018)

50%
(in 10 years)

② Network

Inbound Demand - Domestic Cities Serviced by Jetstar Japan



JAPAN AIRLINES

Jetstar Japan Narita Network

Jetstar 

14 Destinations

43 Flights/Day



Number of Flights via Narita (2019 Summer Schedule)

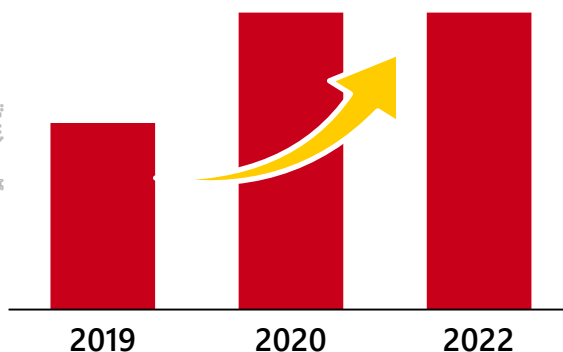
	Route	Flights/Day
Major	Sapporo	8
	Fukuoka	8
	Kansai	4
	Okinawa	4
Shikoku	Takamatsu	3
	Matsuyama	3
	Kochi	1
	Oita	2
Kyushu	Nagasaki	1
	Kumamoto	3
	Miyazaki	2
	Kagoshima	2
	Shimoji-shima	1
	Shonai	1

① Haneda & Narita

Changes in Number of Flights (Forecast)

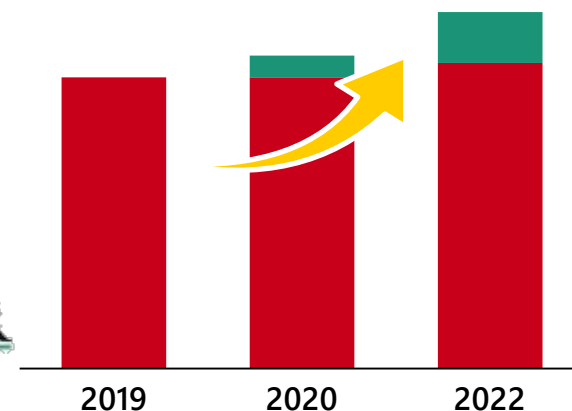
International

Haneda

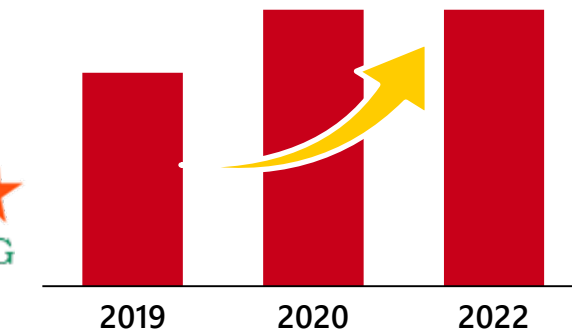
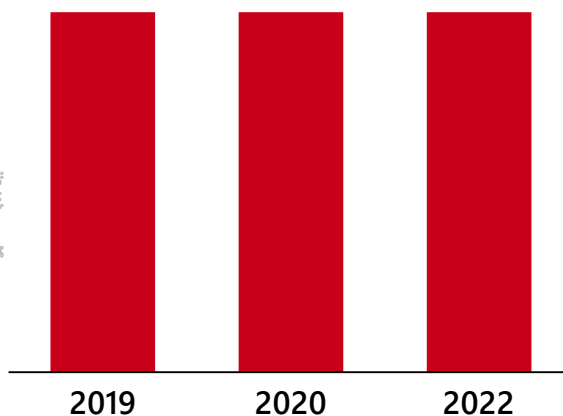


Narita

ZIPAIR
JAL



Domestic



Network Strategy through Partnerships



US

1



Codeshare Partners

31



FINNAIR

BRITISH AIRWAYS

IBERIA

Europe

Asia

Hawaii

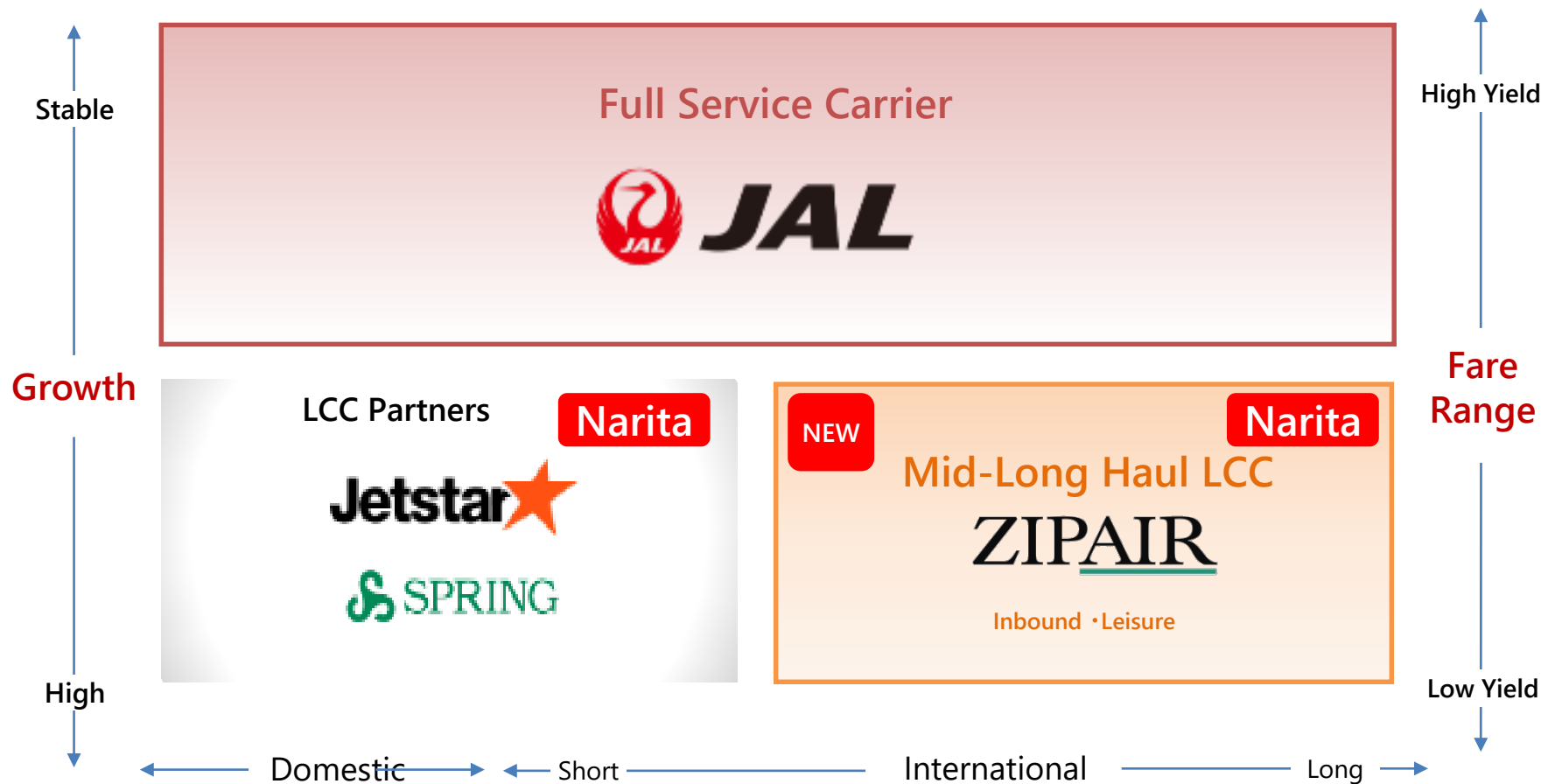
Pacific JB

America

Oceania

③ Corporate Portfolio

JAL Group Strategy



④ Narita Connection

Strategy for South East Asia and North America

Products /Services

Full-flat Business Class Seats

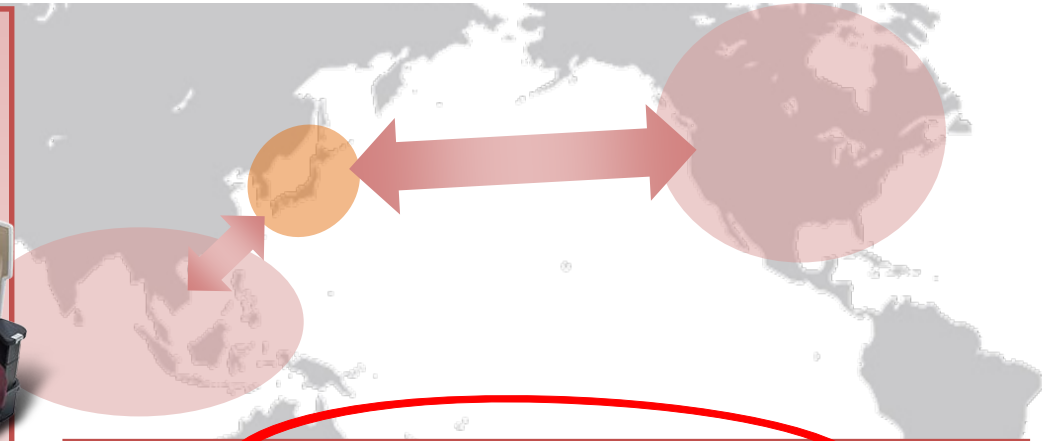


Lounge Services



Renewed
Lounges at
NRT

5 Lounges
1300 seats
at NRT

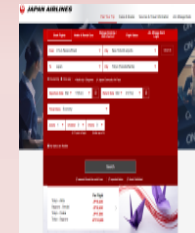


IT Infrastructure

Passenger Service
System

amadeus

Smartphone+Application



Marketing & Sales

Utilizing JB Partner's Sales Channels



④ Narita Connection

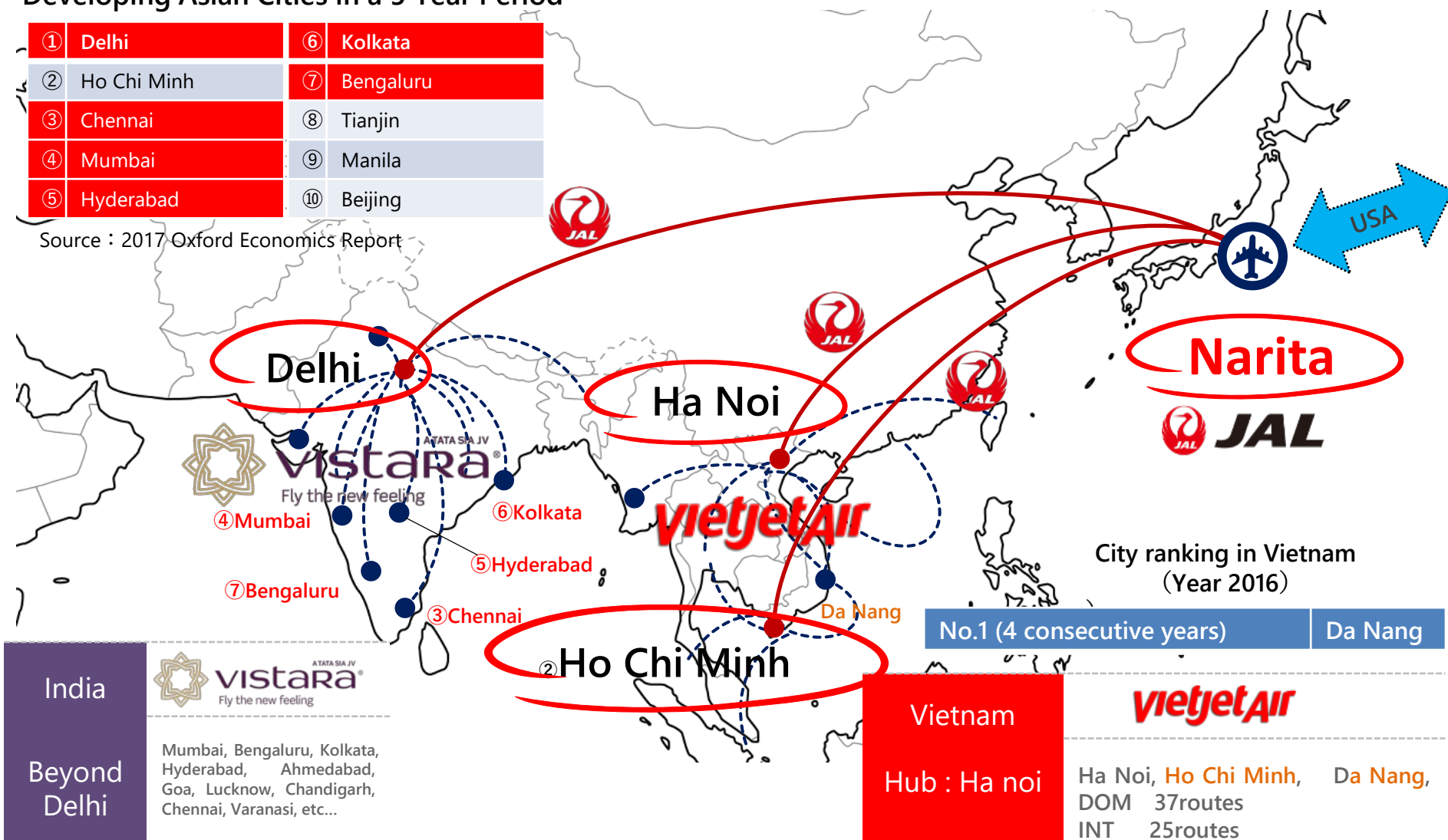
Enhancing Narita as a Hub between Asia and North America



Developing Asian Cities in a 5 Year Period

① Delhi	⑥ Kolkata
② Ho Chi Minh	⑦ Bengaluru
③ Chennai	⑧ Tianjin
④ Mumbai	⑨ Manila
⑤ Hyderabad	⑩ Beijing

Source : 2017 Oxford Economics Report



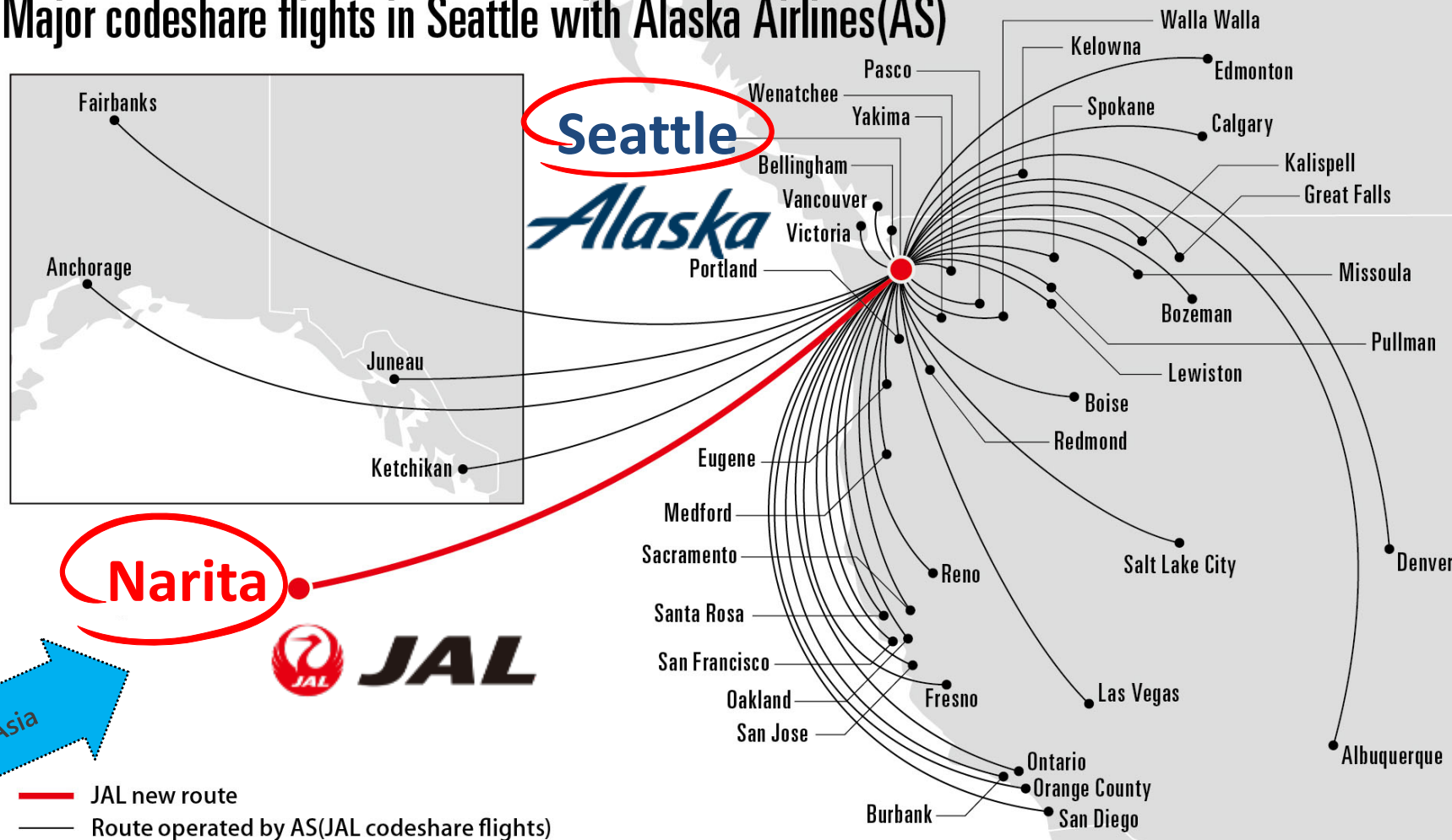
④ Narita Connection

Enhancing Network Strength via Codeshare Partners



JAPAN AIRLINES

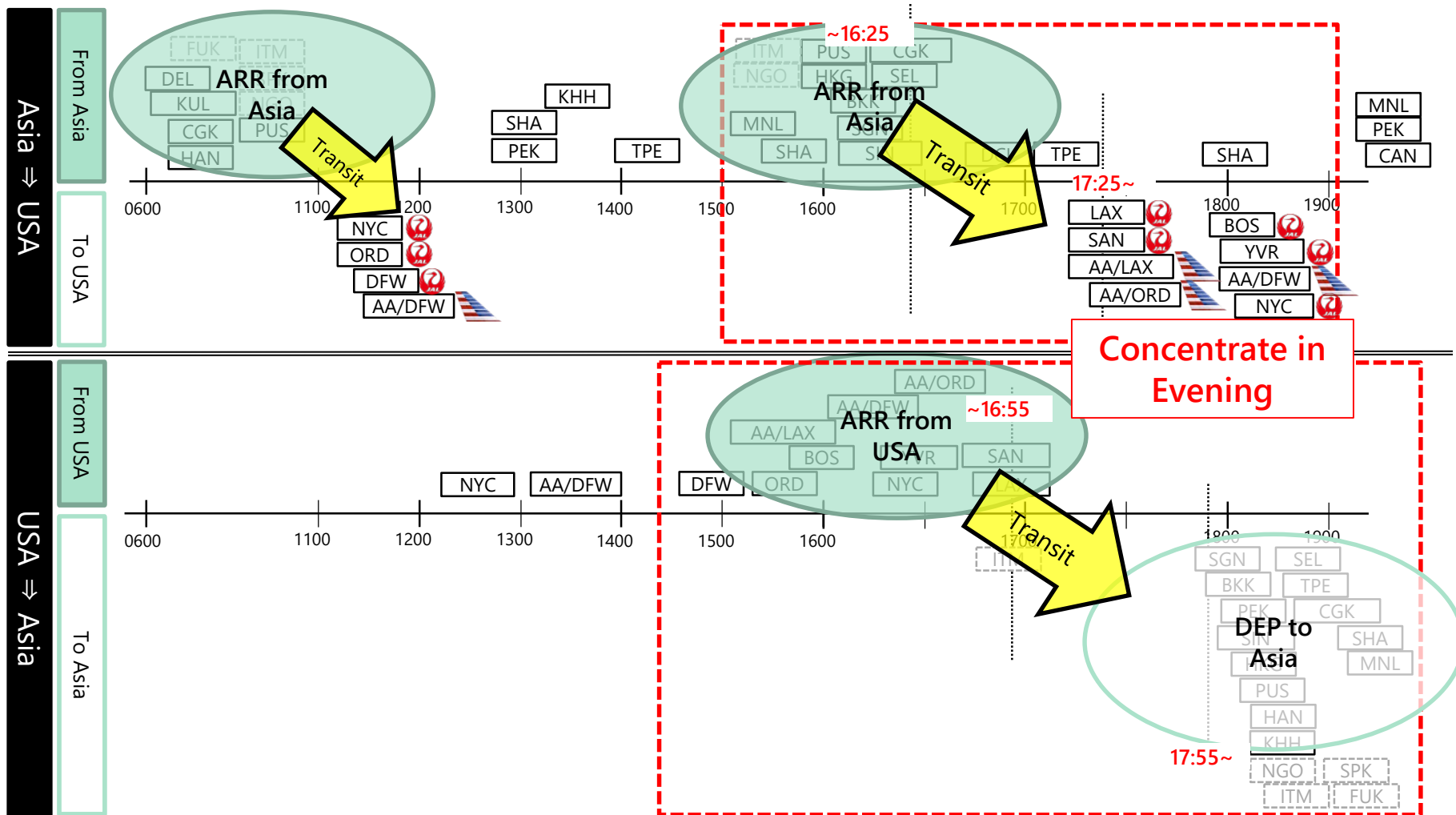
Major codeshare flights in Seattle with Alaska Airlines(AS)



④ Narita Connection

Structure of Time Schedule in Narita Airport

2 frames are created for transit passengers between Asia and North America



Thank you for your attention!



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