

The Future of Civil Aviation in the Asia Pacific Region

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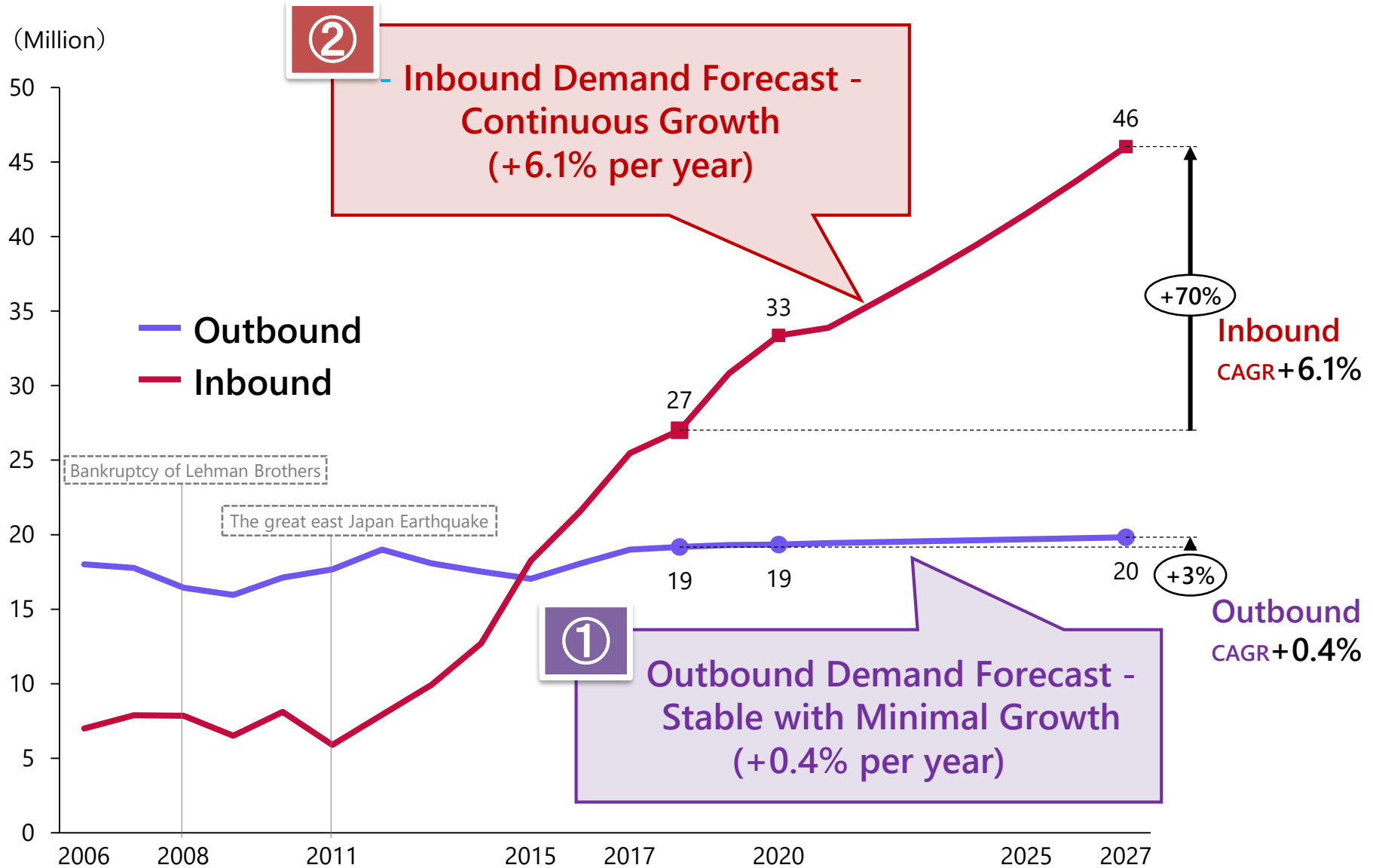


JAPAN AIRLINES

Air Passenger Traffic Demand in Japan Forecast to 2027



Air Passenger Traffic Demand in Japan



Air Passenger Traffic Demand between South East Asia and North America – Transit demand

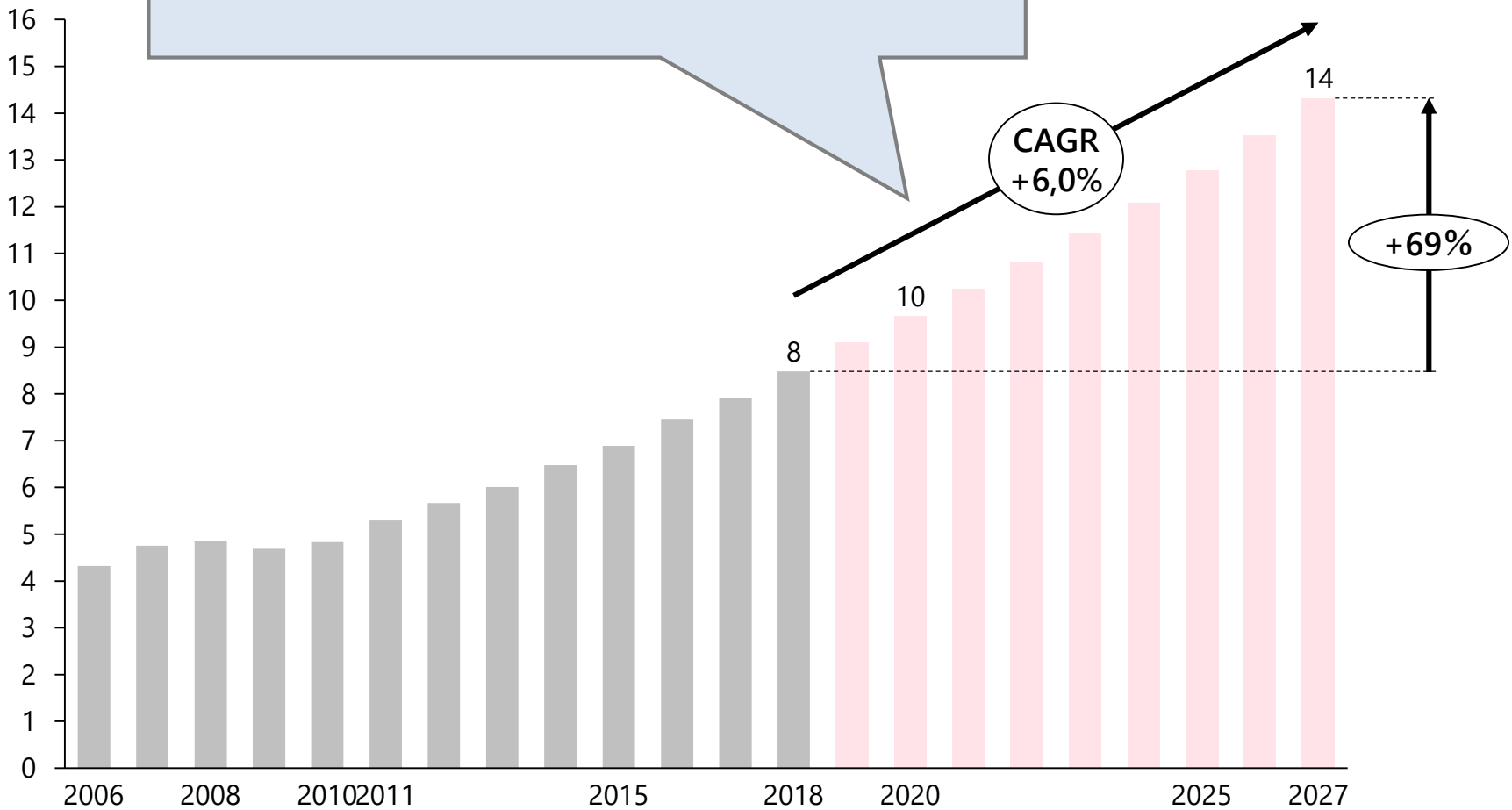


JAPAN AIRLINES

③

Total demand between South East Asia and North America will grow significantly.

(Million)



JAL Strategy

Strategy of Airports in Tokyo (HND/NRT)



Haneda

Narita

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 Flights
- ② Strengthen Transit between South East Asia and North America
- ③ Increase Inbound passenger utilizing Jetstar Japan domestic route
- ④ Establish Long haul LCC

ZIPAIR
Tokyo

2027 JAL Target

Number of Destinations

402 Cities → 500 Cities

Ratio of non-Japanese Passengers

Passenger 46% (FY2018) → 60% (in 10 years)

Domestic Cities Serviced in NRT

Jetstar Japan Narita Network



14 Destinations

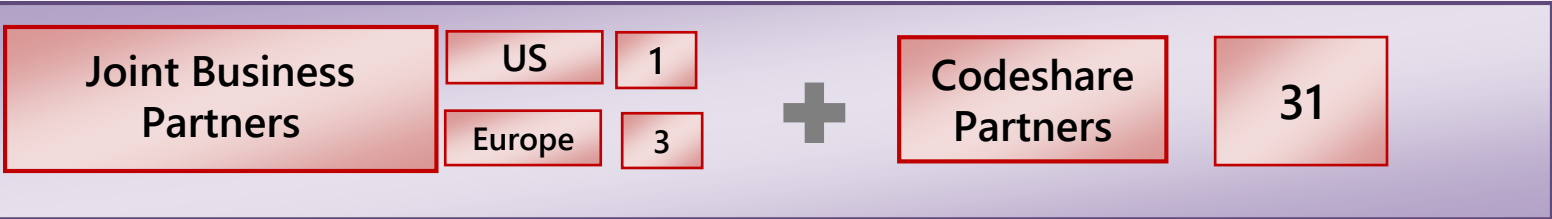
43 Flights/Day

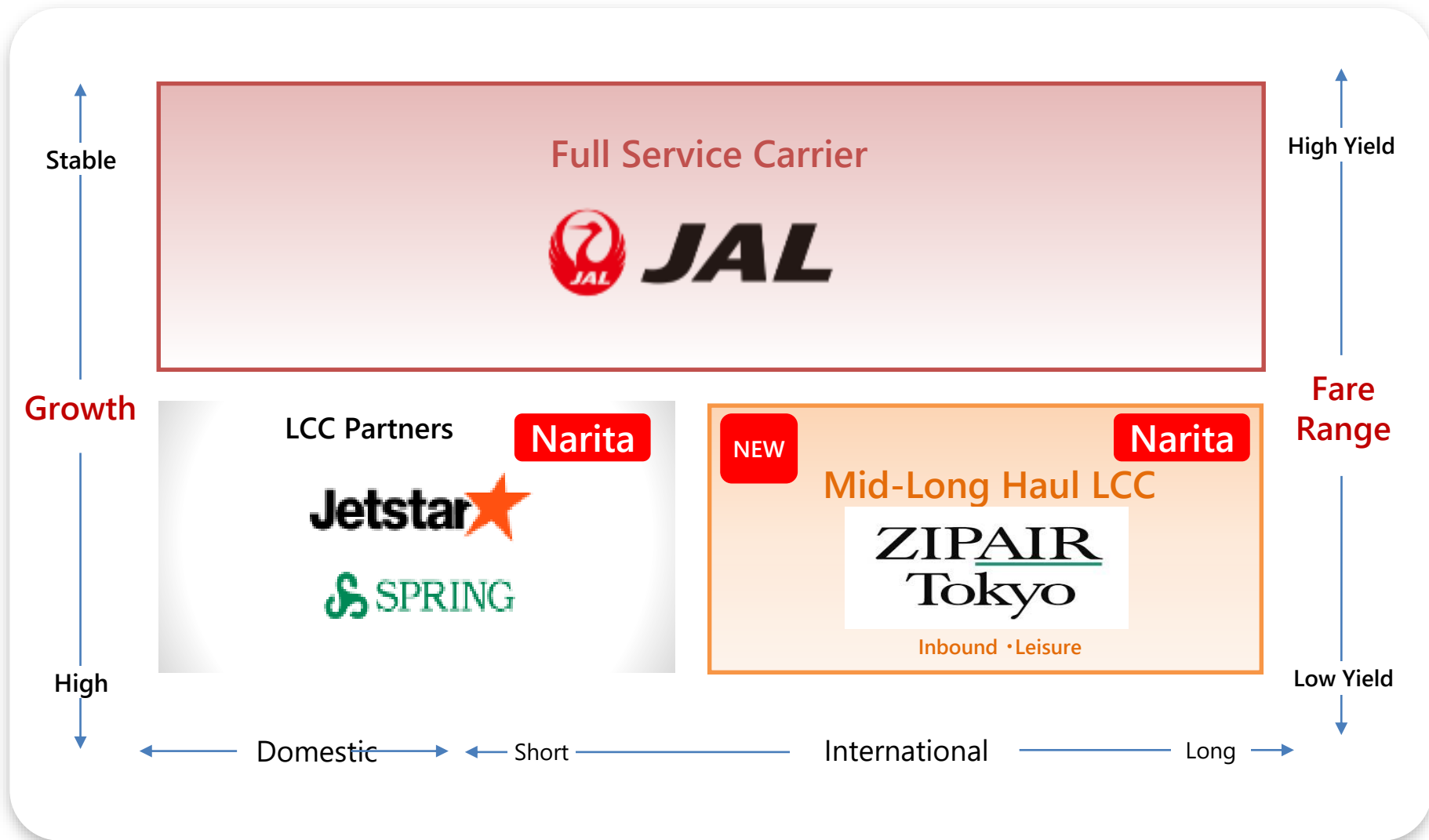


Number of Flights (2019 Summer Schedule)

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

Network Strategy through Partnerships





Strategy for Transit demand

Narita Connection as a HUB

Narita Connection as a HUB Strategy for Transit demand

Products /Services

Full-flat Business Class Seats

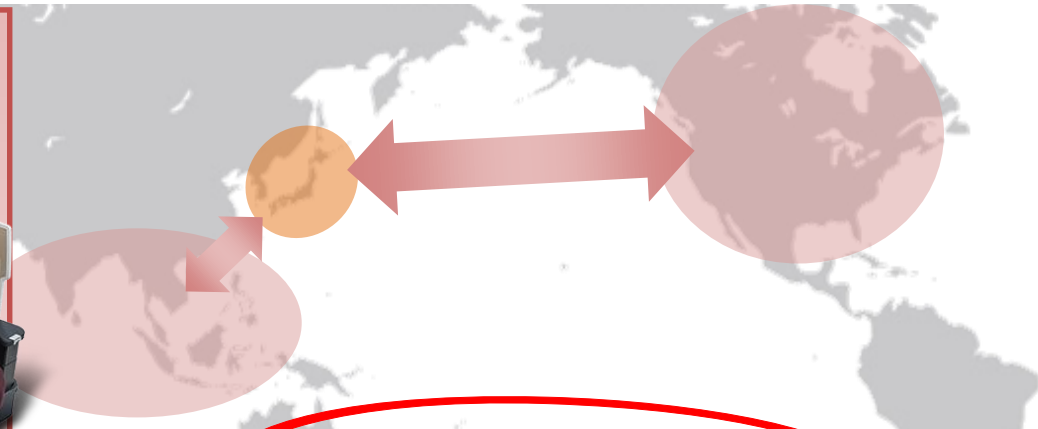


Lounge Services



Renewed
Lounges at
NRT

5 Lounges
1300 seats
at NRT



IT Infrastructure

Passenger Service System

Smartphone+Application

amadeus



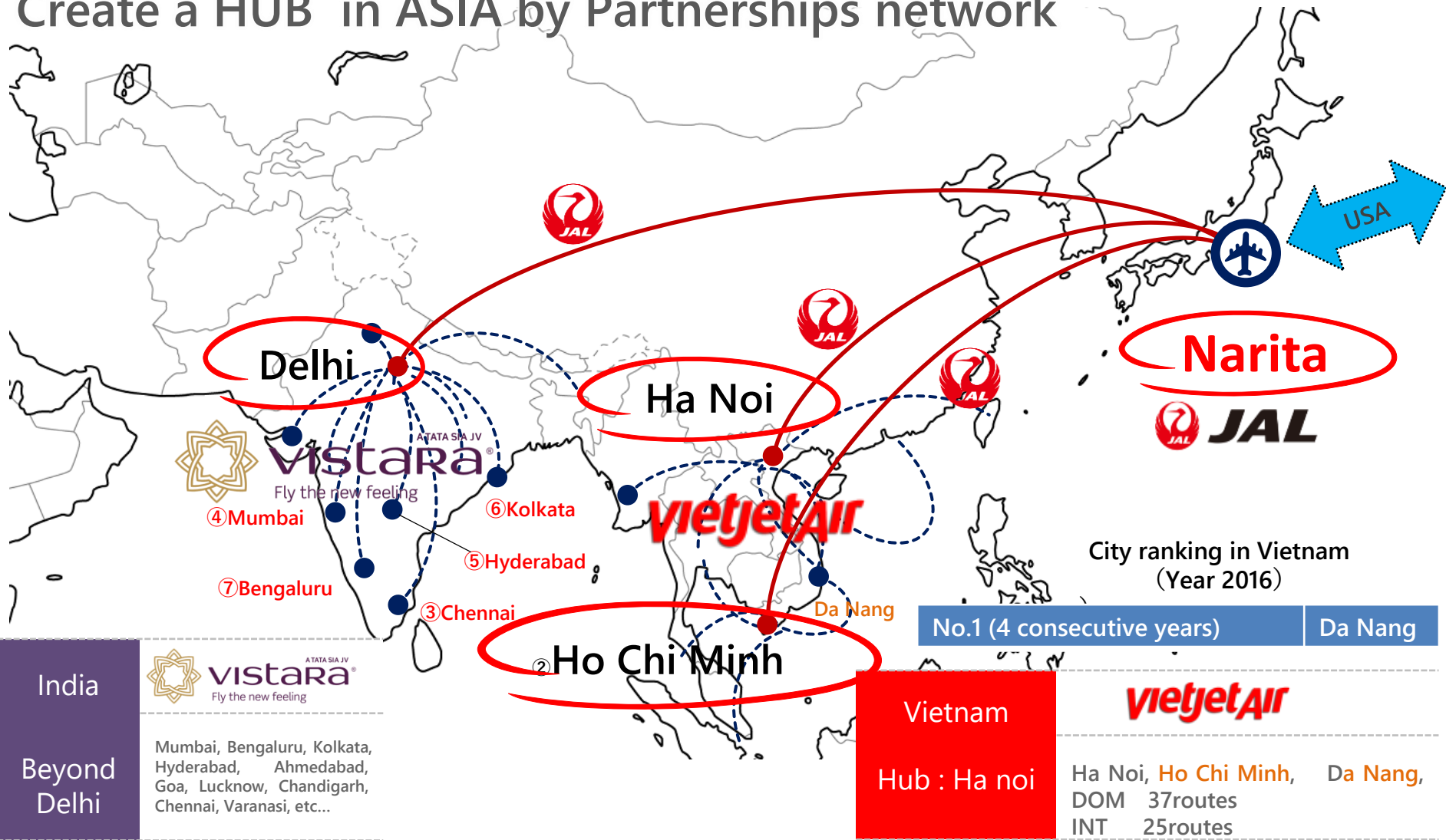
Marketing & Sales

Utilizing JB Partner's Sales Channels



Enhancing Narita as a Hub between South East Asia and North America

Create a HUB in ASIA by Partnerships network



India



vistara
Fly the new feeling

Mumbai, Bengaluru, Kolkata, Hyderabad, Ahmedabad, Goa, Lucknow, Chandigarh, Chennai, Varanasi, etc...

Beyond Delhi

Vietnam



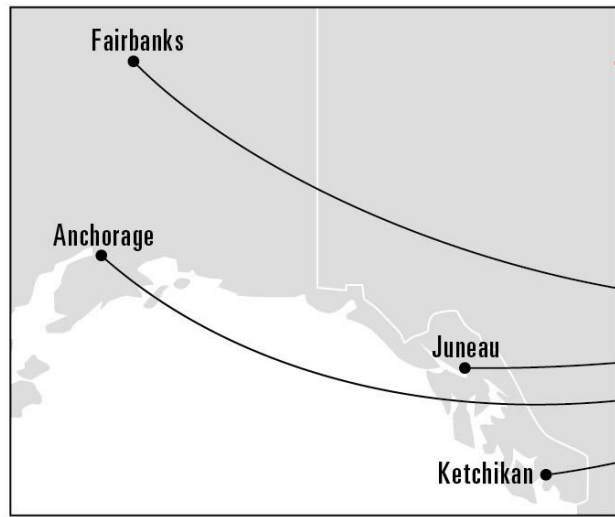
Hub : Ha noi

No.1 (4 consecutive years)	Da Nang
Ha Noi, Ho Chi Minh, Da Nang,	
DOM 37routes	
INT 25routes	

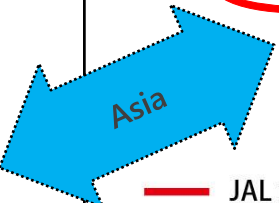
City ranking in Vietnam (Year 2016)

Enhancing Narita as a Hub between South East Asia and North America

Major codeshare flights in Seattle with Alaska Airlines(AS)

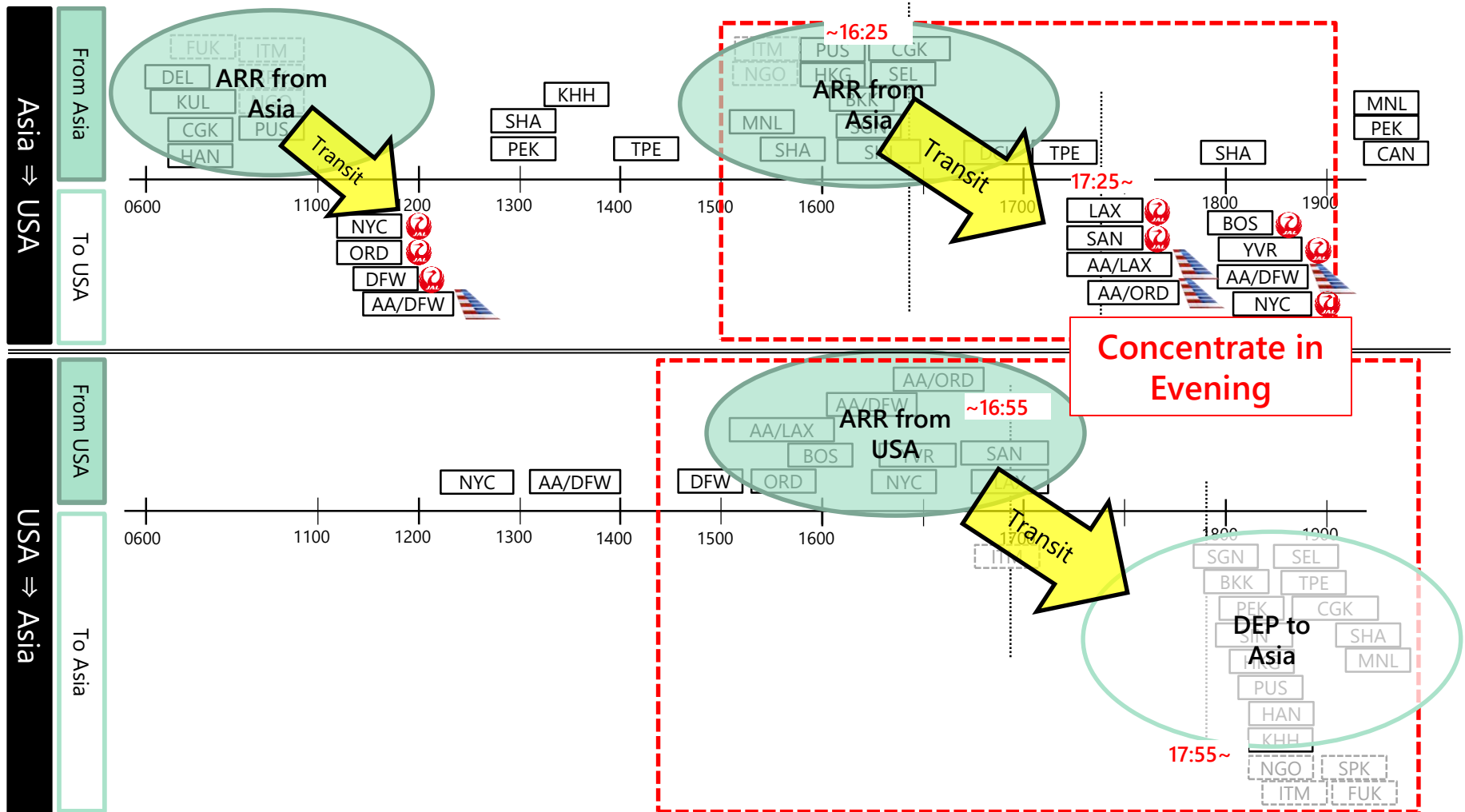


Narita



— JAL new route
— Route operated by AS(JAL codeshare flights)

2 frames are created for transit between Asia and North America



Thank you for your attention



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