

Emirates
New for
2014



Presentation to British Airways



臺灣桃園
國際機場

Taiwan Taoyuan
International Airport



Contents

TTIA: The airport and TAIWAN Market Update Air Service Program





TTIA: The Airport and TAIWAN

About the Airport:

- 28 million passengers
- 24 hour operations
- Dual runway operations
- 146 International destinations
(44 Mainland China cities)

About Taiwan:

- Average GDP of \$38,500
(South Korea \$32,400)
- 23 million population
- 3.31% projected GDP in 2014
- A US visa-waiver state
- 6,000 in the UK
- 11,000 in France
- 926,000 in the US
- 32,000 in New York



臺灣桃園
國際機場

Taiwan Taoyuan
International Airport

Taiwan-London Yield Comparison (US\$)

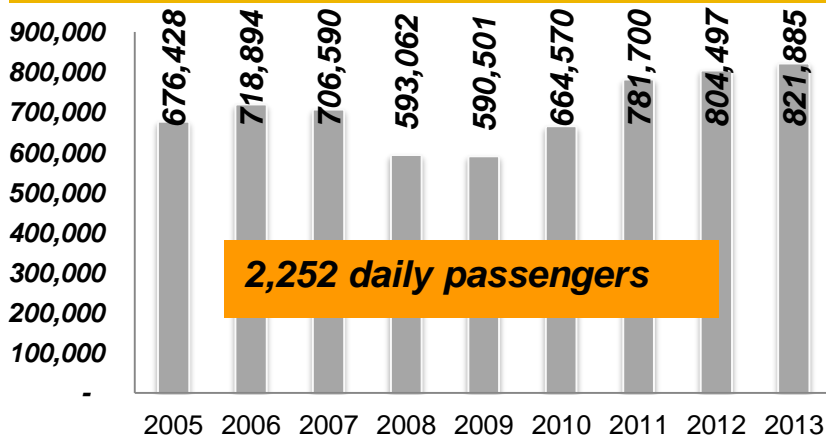
Market	Average Yield	BA Average	BA Premium
TPE	\$ 1,080	\$ 1,350	25%
HKG	\$ 1,313	\$ 1,605	22%
CAN	\$ 555	\$ 1,426	157%
KUL	\$ 921	\$ 1,311	42%
ICN	\$ 906	\$ 1,089	20%
BKK	\$ 498	\$ 740	49%

Airline Share of UK-Taiwan Traffic - 2013

Airline	UK Share
Cathay Pacific	28%
EVA Air	24%
KLM	13%
British Airways	7%
China Airlines	5%
Etihad	4%
Singapore Airlines	3%
Air China	3%
Vietnam Airlines	2%
Air New Zealand	2%
Others	9%

- Two airlines no longer offer HKG-LHR operations; NZ and QF.
- China airlines no longer operates direct – they had 9% share
- Emirates enters the TPE market in 2014
- Up to 43% mileage detour via SIN for connections
- US visa waiver started Nov 2012
- Europe traffic up 40% since 2009
- BA can extract a premium – it already does from TPE

Europe-Taiwan to June 2013 MIDT Data



TPE European Markets - 2013

Taiwan to:	2013 Traffic	Average Yield
UK/Ireland	100,987	\$ 1,040
Germany	174,609	\$ 909
France	137,675	\$ 963
Italy	62,530	\$ 912
Holland	62,974	\$ 1,002
Austria	51,109	\$ 1,106
Switzerland	28,848	\$ 1,065
Spain	26,536	\$ 857
Scandinavia	26,052	\$ 857

297daily UK/Irish passengers

Taiwan to:	Business class	% of market	Revenue/mile
Germany	24,885	14.25%	0.34
France	16,472	11.96%	0.36
UK	14,797	15.67%	0.36
Italy	9,935	15.89%	0.32
Holland	10,232	16.25%	0.34
Austria	8,960	17.53%	0.4
Switzerland	6,299	21.84%	0.35
Spain	2,899	10.92%	0.32
Scandinavia	3,303	12.68%	0.32

291daily business class passengers

- Some of Asia's cheapest airport charges
- Cheaper fuel than HKG, ICN, NRT, PEK and PVG
- Competitive ramp and passenger handling
- 24 hour operations
- Open skies to Thailand, Singapore and Japan
- 3 international airlines based in TPE
- 56% increase in business class traffic to Europe in 4 years

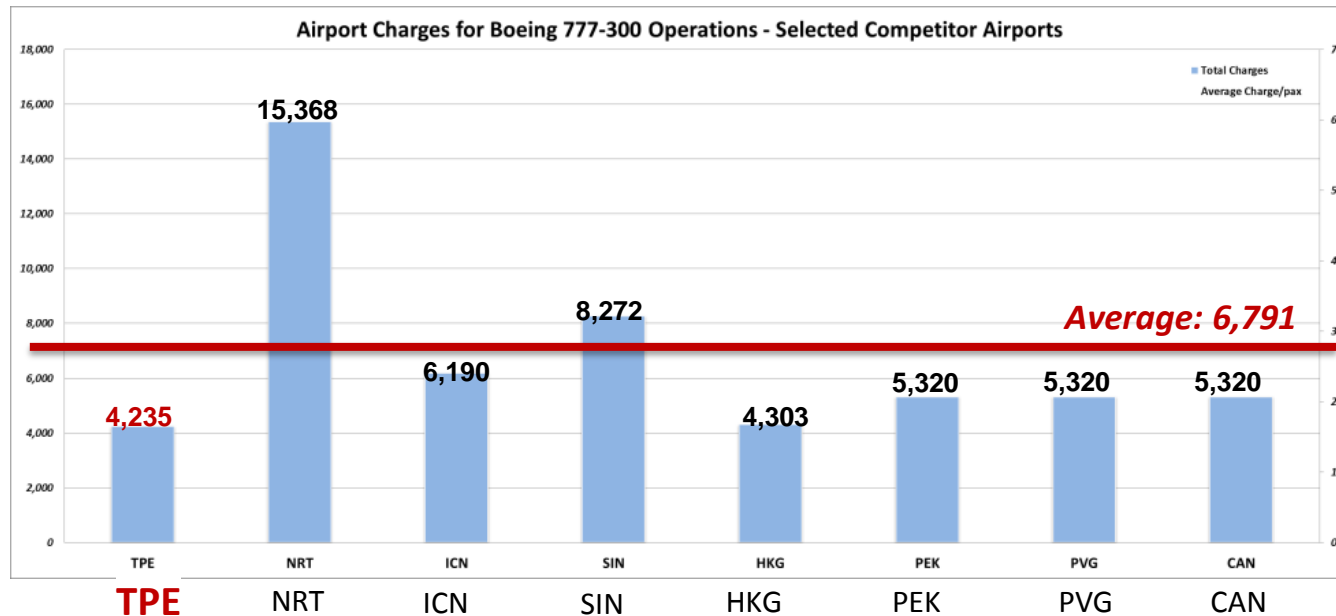


Cheapest cost in East Asia

**Airport charges in TPE,
38% below average in East Asia**

USD

*B773, 70% loading factor



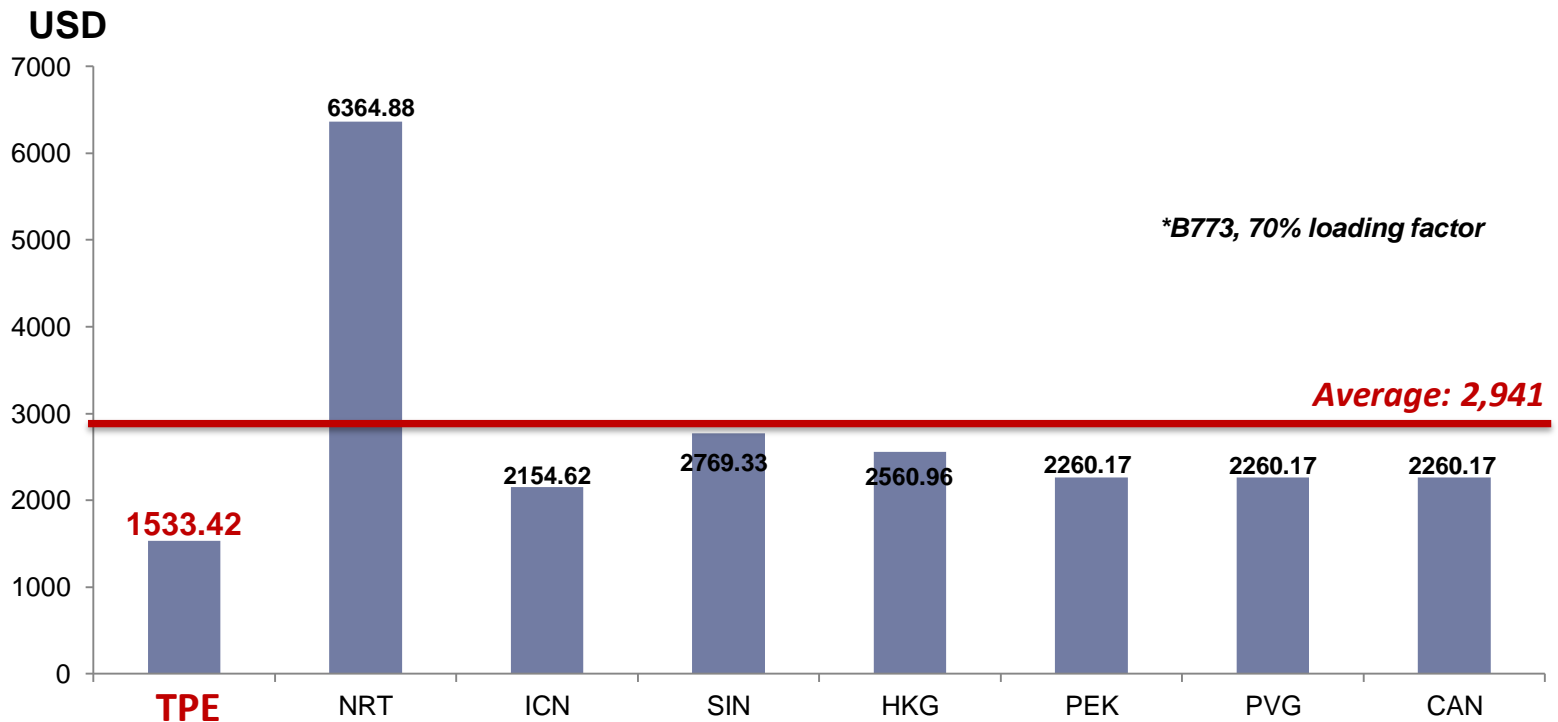
臺灣桃園
國際機場

Taiwan Taoyuan
International Airport



Cheapest cost in East Asia

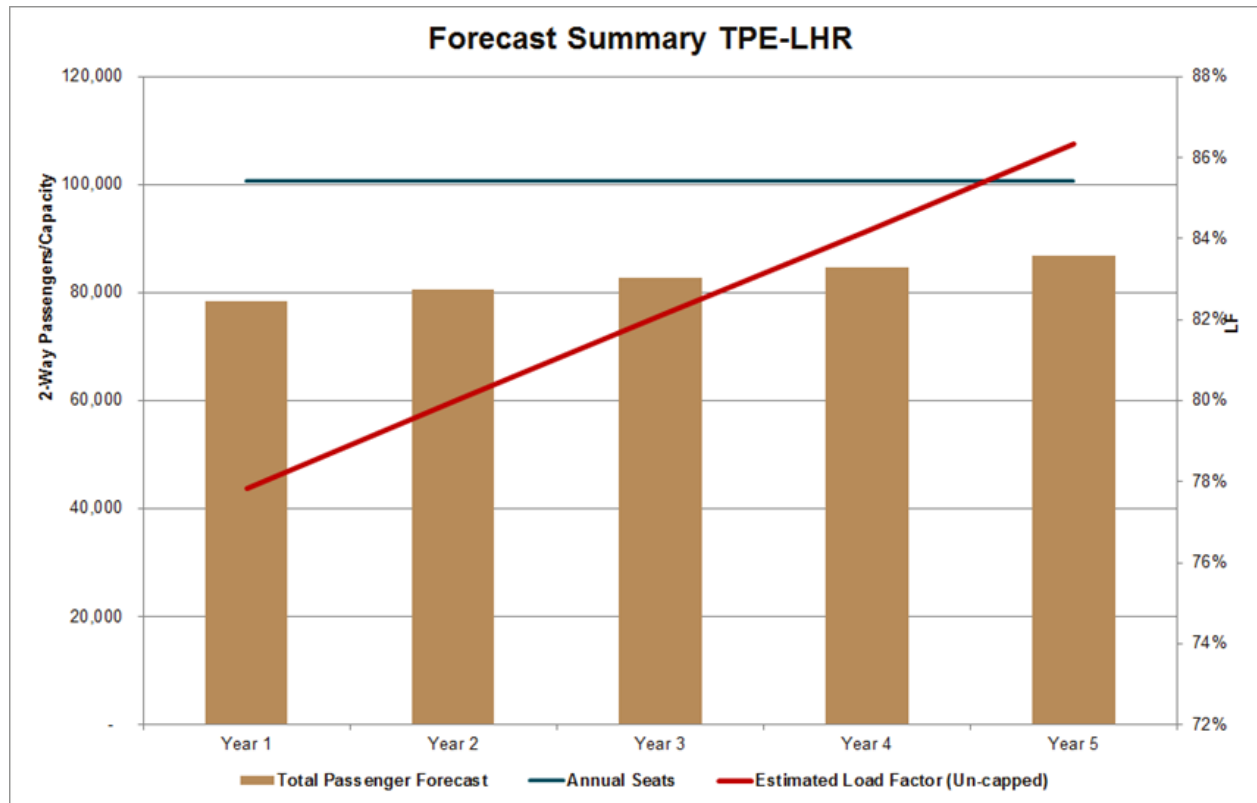
**Landing fee in TPE,
48% below average in East Asia**



臺灣桃園
國際機場

Taiwan Taoyuan
International Airport

British Airways Traffic Forecasts



- British Airways starts at 78% load factor.
- The route needs more capacity by Year 5.



臺灣桃園
國際機場

Taiwan Taoyuan
International Airport

British Airways Revenue Projection

London to:	Annual Revenue
Hong Kong	\$251,865,830
Singapore	\$206,558,678
Tokyo Narita	\$147,264,805
<i>Taipei</i>	<i>\$84,184,399</i>
Beijing	\$75,393,262
Shanghai	\$63,456,750
Tokyo Haneda	\$59,365,096
Bangkok	\$52,042,468
Seoul	\$12,229,840

The projected TPE revenues are **HIGHER** than those in Beijing, Shanghai, Bangkok & Seoul.



臺灣桃園
國際機場

Taiwan Taoyuan
International Airport



Air Service Pack



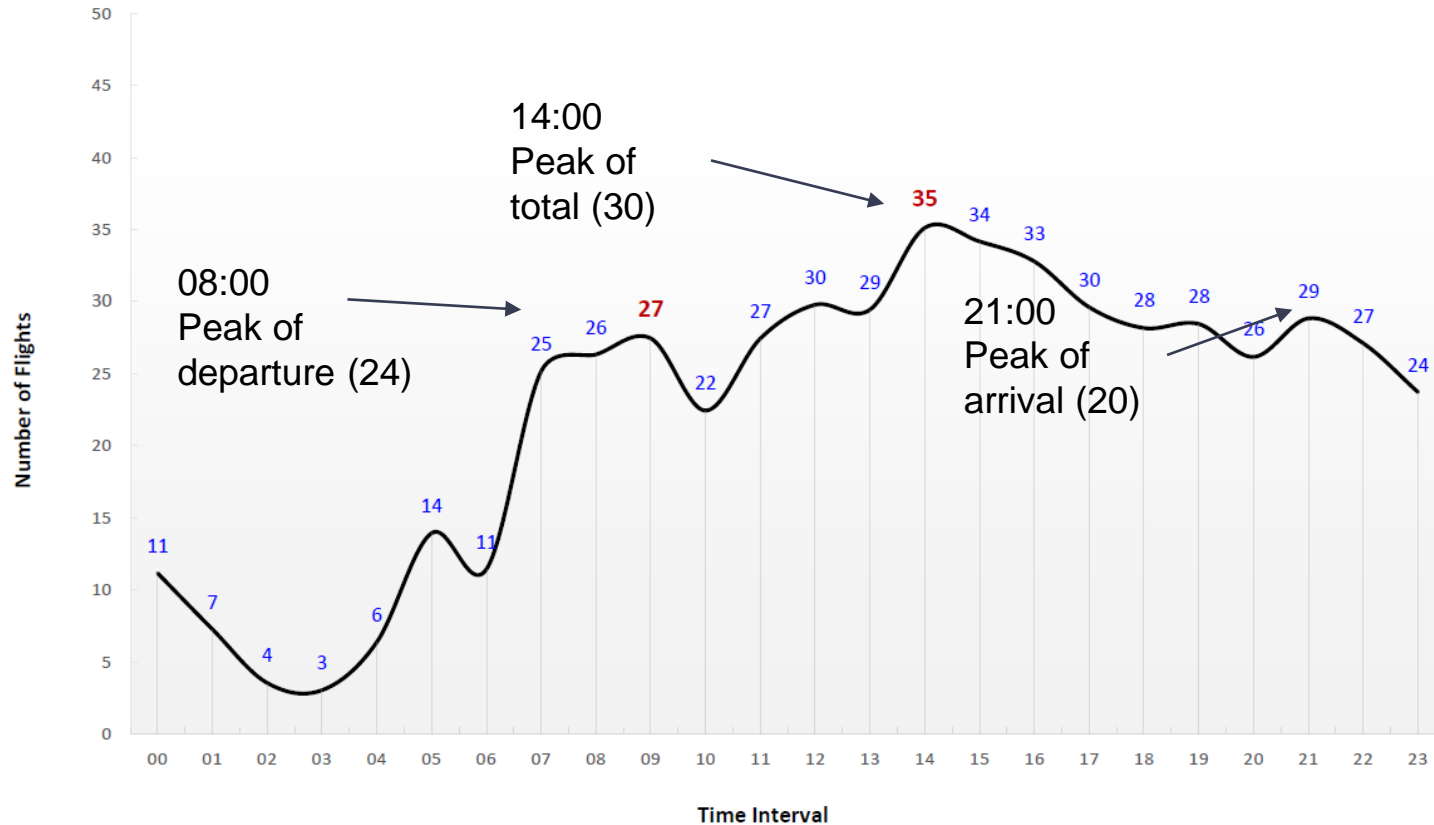
臺灣桃園
國際機場

Taiwan Taoyuan
International Airport

Peaks and non-Peaks



2013-July-Average



Daily movements : 600 flights in 2013

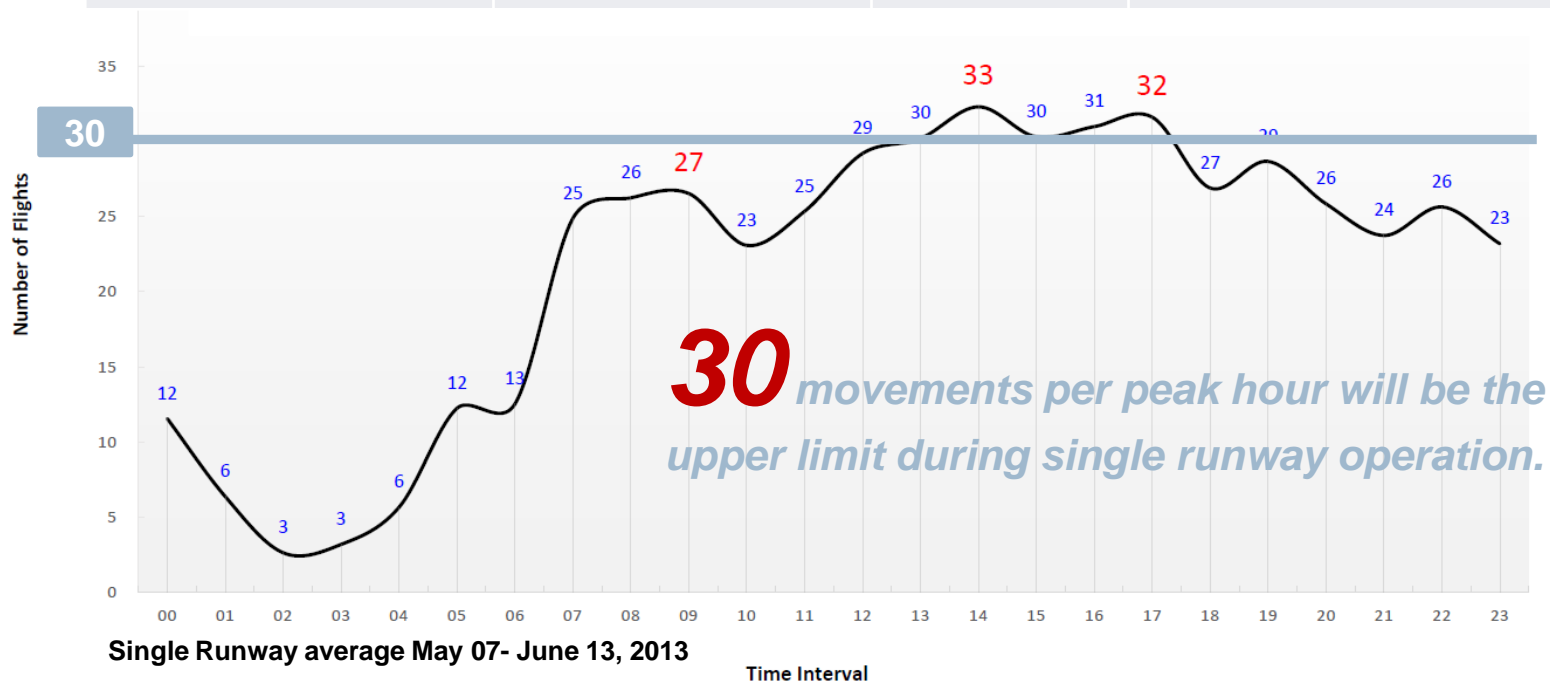


臺灣桃園
國際機場

Taiwan Taoyuan
International Airport

Single Runway Operation Notice (2013-2014) starting 27-Oct. 2013

	Starting date	Ending date	Remark
Period 1 Winter schedule 2013	10:00 27-Oct. 2013	18:00 20-Dec. 2013	Closing RY 05R/23L (closing 2 RYs 0100-0300)
Period 2 Summer + Winter schedule 2014	14-Feb. 2014	Sep. 2014	Closing RY 05R/23L (closing 2 RYs 0100-0300)



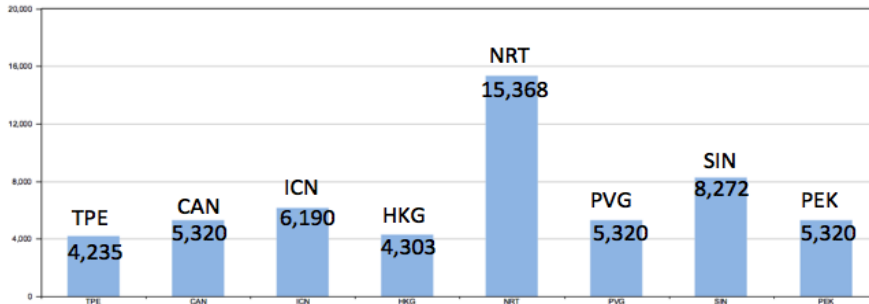


Costly choice, Best yield!

.TTIA has **competitive** & **reasonable** Cost, Fees & Charges compared to other airports in East Asia.

Cheapest cost in East Asia (E.g. B773)

Airport Charges for Boeing 777-300 Operations - Selected Competitor Airports



Taiwan Yield Comparison (US\$)

To LAX from	Average Yield	Revenue/km
Hong Kong	\$ 1,269	0.11
Taipei	\$ 1,104	0.10
Osaka	\$ 1,048	0.10
Seoul	\$ 931	0.10
Guangzhou	\$ 873	0.07
Shanghai	\$ 834	0.08



臺灣桃園
國際機場

Taiwan Taoyuan
International Airport



How to start your operation in TTIA?

1 Decide to operate in TTIA

Contact CAA for official permission of operation in Taiwan (see next slide)

2 Apply for and get below document :

- Air route certificate
- Permission of the branch (if you decide to have a branch)

Contact TIAC for operation in Taoyuan Airport

3 Confirm below issues:

- which terminal?
- Check-in counter arrangement
- Boarding gate arrangement
- IT & communication system
- Office rent
- Other administration affairs

Any questions please contact:

Mr. Tony Yu

TEL:+886-3-398-3541

FAX:+886-3-398-3790

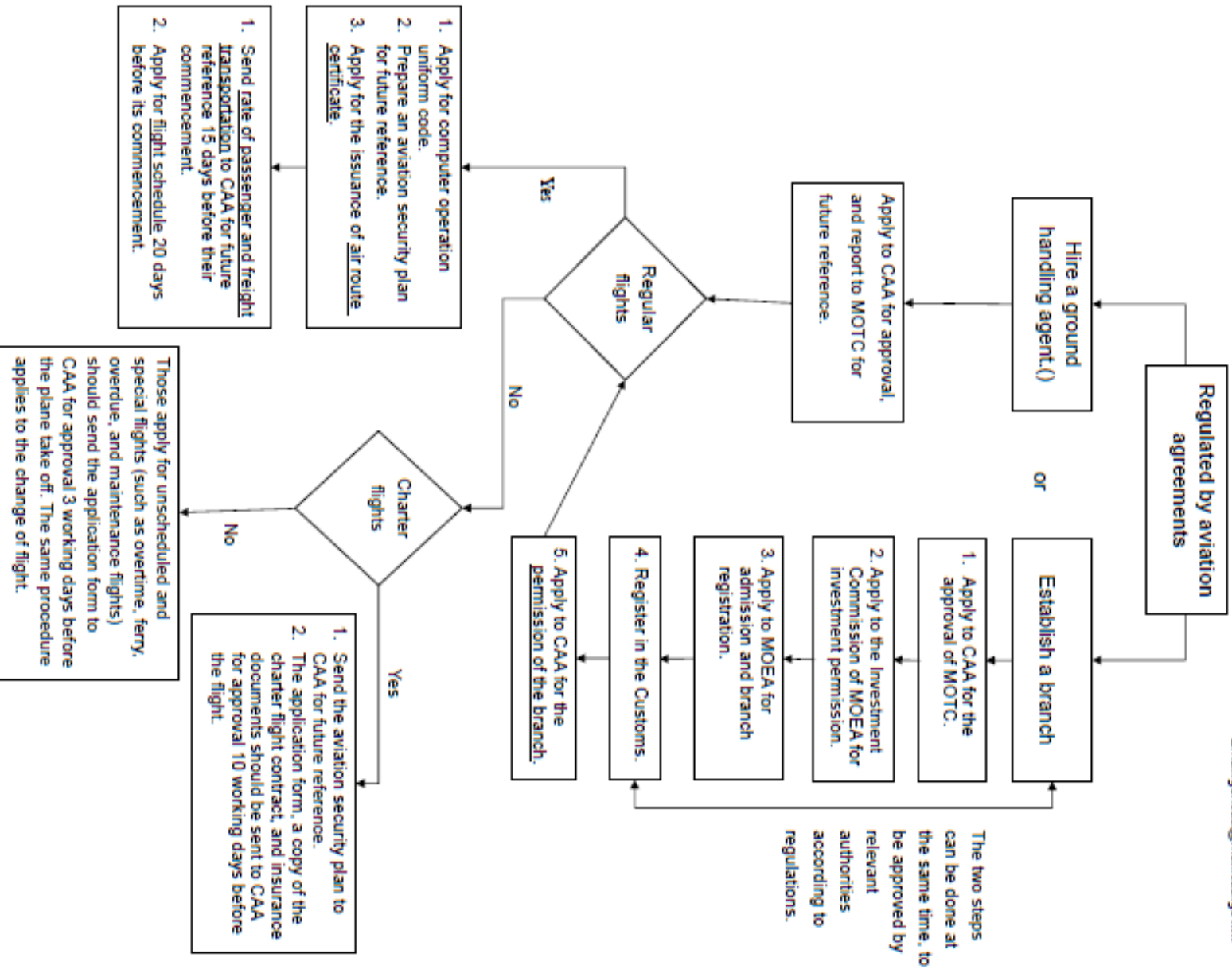
Email: tonyyu@mail.taoyuan-airport.com

Taoyuan International Airport Corporation Ltd.(TIAC)

STEPS to apply for operation in TW

*

Contact:
 Air Transport Division, CAA
 Phone: +886-2-2349-6280
 Email: gencaa@mail.caa.gov.tw



STEPS to apply for operation in TAIWAN



Notes

1. MOTC(Ministry of Transportation and Communications) 、 MOEA (Ministry of Economic Affairs).
2. Airlines landing in Taoyuan or Kaohsiung airports in Taiwan should attach slot time in their schedule or flight application materials.
3. Current ground handling agents in Taoyuan Airport:

- **China Airlines**

Ground Service Division

Phone:+886-3-398-7343

Email:peter.liu@china-airlines.com

- **Eva Airways**

Ground Handling Operation Management SEC1

Phone:+886-3-351-5696

Email:melodypeng@evaair.com

- **TransAsia Airways**

Ground Service Division

Phone:+886-2-8770-5290#27027

Email:cjackson@tna.com.tw

Contact:

Air Transport Division, CAA

Phone: +886-2-2349-6280

Email:gencaa@mail.caa.gov.tw



Appendix 1 Air Routes Analysis connecting to Taoyuan International Airport

Airlines and destinations (1/3)



Airlines	Destinations
Air Busan	Busan
Air China	Beijing-Capital, Chengdu, Chongqing, Hangzhou, Shanghai-Pudong, Wenzhou
Air Macau	Macau
Air Asia	Kota Kinabalu
AirAsia X	Kuala Lumpur
All Nippon Airways operated by Air Japan	Tokyo-Narita
Asiana Airlines	Seoul-Incheon
Cathay Pacific	Fukuoka, Hong Kong, Nagoya-Centrair, Osaka-Kansai, Seoul-Incheon, Tokyo-Narita
Cebu Pacific	Manila
China Airlines	Amsterdam, Bangkok-Suvarnabhumi, Chiang Mai, Delhi, Denpasar/Bali, Frankfurt, Hanoi, Ho Chi Minh City, Hong Kong, Jakarta-Soekarno-Hatta, Kaohsiung, Koror, Kuala Lumpur, Manila, Penang, Phnom Penh, Phuket, Rome-Fiumicino, Seoul-Incheon, Singapore, Surabaya, Vienna, Yangon
China Airlines	Auckland, Beijing-Capital, Brisbane, Chengdu, Dalian, Fukuoka, Guam, Guangzhou, Haikou, Hiroshima, Honolulu, Los Angeles, Miyazaki, Nagoya-Centrair, Naha, Nanchang, New York-JFK, Osaka-Kansai, Qingdao, San Francisco, Sanya, Sapporo-Chitose, Shanghai-Pudong, Shenzhen, Sydney, Tokyo-Narita, Vancouver, Wuhan, Xi'an, Kagoshima, Shimizu, Toyama



Airlines and destinations (2/3)

Airlines	Destinations
China Eastern Airlines	Hefei, Kunming, Nanchang, Nanjing, Ningbo, Qingdao, Shanghai-Pudong, Shijiazhuang, Taiyuan, Wuhan, Wuxi, Xi'an, Yancheng
China Southern Airlines	Changchun, Changsha, Dalian, Guangzhou, Guilin, Guiyang, Harbin, Nanning, Shanghai-Pudong, Shenyang, Shenzhen, Wuhan, Zhengzhou
Delta Air Lines	Tokyo-Narita
Dragonair	Hong Kong
EVA Air	Amsterdam, Bangkok-Suvarnabhumi, Beijing-Capital, Brisbane, Chengdu, Denpasar/Bali, Fukuoka, Guam, Guangzhou, Hakodate [begins 28 October 2012], Hangzhou, Hanoi, Harbin, Ho Chi Minh City, Hong Kong, Huangshan, Jakarta-Soekarno-Hatta, Jinan, Komatsu, Kuala Lumpur, London-Heathrow, Los Angeles, Macau, Manila, Nanjing, New York-JFK, Osaka-Kansai, Paris-Charles de Gaulle, Phnom Penh, San Francisco, Sapporo-Chitose, Seattle/Tacoma, Sendai, Seoul-Incheon, Shanghai-Pudong, Singapore, Surabaya, Sydney, Tianjin, Tokyo-Narita, Toronto-Pearson, Vancouver, Vienna, Yangon [begins 9 October 2012], Zhengzhou
EVA Air operated by Uni Air	Macau
Far Eastern Air Transport	Hefei [begins 28 October 2012] Charter: Da Nang
Garuda Indonesia	Jakarta-Soekarno-Hatta
Hainan Airlines	Beijing-Capital, Dalian, Guangzhou, Haikou, Lanzhou, Sanya, Xi'an
Hong Kong Airlines	Hong Kong
Japan Airlines	Nagoya-Centrair, Osaka-Kansai, Tokyo-Narita
Jetstar Asia Airways	Osaka-Kansai, Singapore



Airlines and destinations (3/3)

Airlines	Destinations
Jin Air	Jeju
KLM	Amsterdam
Korean Air	Seoul-Incheon
Malaysia Airlines	Kota Kinabalu, Kuala Lumpur
Mandarin Airlines	Kalibo
Mandarin Airlines	Changsha, Nanjing, Ningbo, Shenyang, Xiamen, Yancheng, Zhengzhou
Palau Airways	Koror
Peach	Osaka-Kansai [begins 16 October 2012]
Philippine Airlines	Manila
Scoot	Singapore
Shandong Airlines	Jinan, Qingdao, Yantai
Shanghai Airlines	Nanjing, Xuzhou
Shenzhen Airlines	Nanning, Shenyang, Shenzhen, Wuxi, Zhengzhou
Sichuan Airlines	Kunming
Singapore Airlines	Singapore
Tiger Airways	Singapore
Thai Airways International	Bangkok-Suvarnabhumi, Phuket [begins 28 October 2012], Hong Kong [resumes 28 October 2012], Seoul-Incheon
TransAsia Airways	Asahikawa, Busan, Changsha, Chiang Mai, Jeju, Hakodate, Kushiro, Macau, Naha, Osaka-Kansai, Singapore, Shanghai-Pudong, Phuket, Sanya, Sapporo-Chitose, Tokachi-Obihiro, Xuzhou Charter : Da Nang, Koror
TonleSap Airlines	Siem Reap
Uni Air	Chongqing, Dalian, Fuzhou, Nanjing, Ningbo, Qingdao, Shenyang, Shenzhen, Xian
United Airlines	San Francisco [begins 9 April 2013], ^[28] Tokyo-Narita [ends 27 October 2012]
Vietnam Airlines	Hanoi, Ho Chi Minh City Seasonal: Can Tho
Xiamen Airlines	Changsha, Fuzhou, Hangzhou, Quanzhou, Xiamen
Zest Airways	Kalibo



Cargo destinations

Airlines	Destinations
Air Hong Kong	Hong Kong
Air Macau	Macau
ANA Cargo	Osaka-Kansai, Tokyo-Narita
Cargolux	Bangkok-Suvarnabhumi, Baku, Beirut, Budapest, Kuwait, Luxembourg
Cathay Pacific Cargo	Hong Kong
China Airlines Cargo	Abu Dhabi, Amsterdam, Anchorage, Atlanta, Bangkok-Suvarnabhumi, Chennai, Chicago-O'Hare, Dallas/Fort Worth, Frankfurt, Guangzhou, Hanoi, Hong Kong, Ho Chi Minh City, Houston-Intercontinental, Jakarta-Soekarno-Hatta, Kalibo, Kaohsiung, Kuala Lumpur, Los Angeles, Luxembourg, Manchester, Manila, Miami, Nanjing, New York-JFK, Osaka-Kansai, Penang, Prague, San Francisco, Seattle/Tacoma, Shanghai-Pudong, Singapore, Tokyo-Narita, Xiamen
China Cargo Airlines	Shanghai-Pudong, Xiamen
DHL Aviation operated by Air Hong Kong	Hong Kong
Emirates SkyCargo	Dubai
EVA Air Cargo	Anchorage, Atlanta, Bangkok-Suvarnabhumi, Brussels, Chicago O'Hare, Dallas/Fort Worth, Delhi, Frankfurt, Guangzhou, Hanoi, Hong Kong, Houston-Intercontinental, Seoul-Incheon, Jakarta-Soekarno-Hatta, London-Heathrow, Los Angeles, Macau, Manila, New York-JFK, Osaka-Kansai, Penang, Seattle/Tacoma, Singapore, Vancouver, Vienna
FedEx Express	Anchorage, Osaka-Kansai, Tokyo-Narita
MASKargo	Kuala Lumpur
Nippon Cargo Airlines	Tokyo-Narita
Pacific East Asia Cargo Airlines	Clark
Singapore Airlines Cargo	Singapore, Tokyo-Narita
Thai Cargo	Bangkok-Suvarnabhumi, Tokyo-Narita
Trai Thien Air Cargo	Hanoi
TransGlobal Airways	Clark
UPS Airlines	Anchorage, Clark , Cologne/Bonn , Dubai , Seoul-Incheon



Appendix 2

Table of Rates and Fee-charging Standards for the Use of Airfield Assets and related Facilities

