



北美支线航空市场发展

Regional Aviation in North America

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美国支线航空公司概况 US Regional Airlines

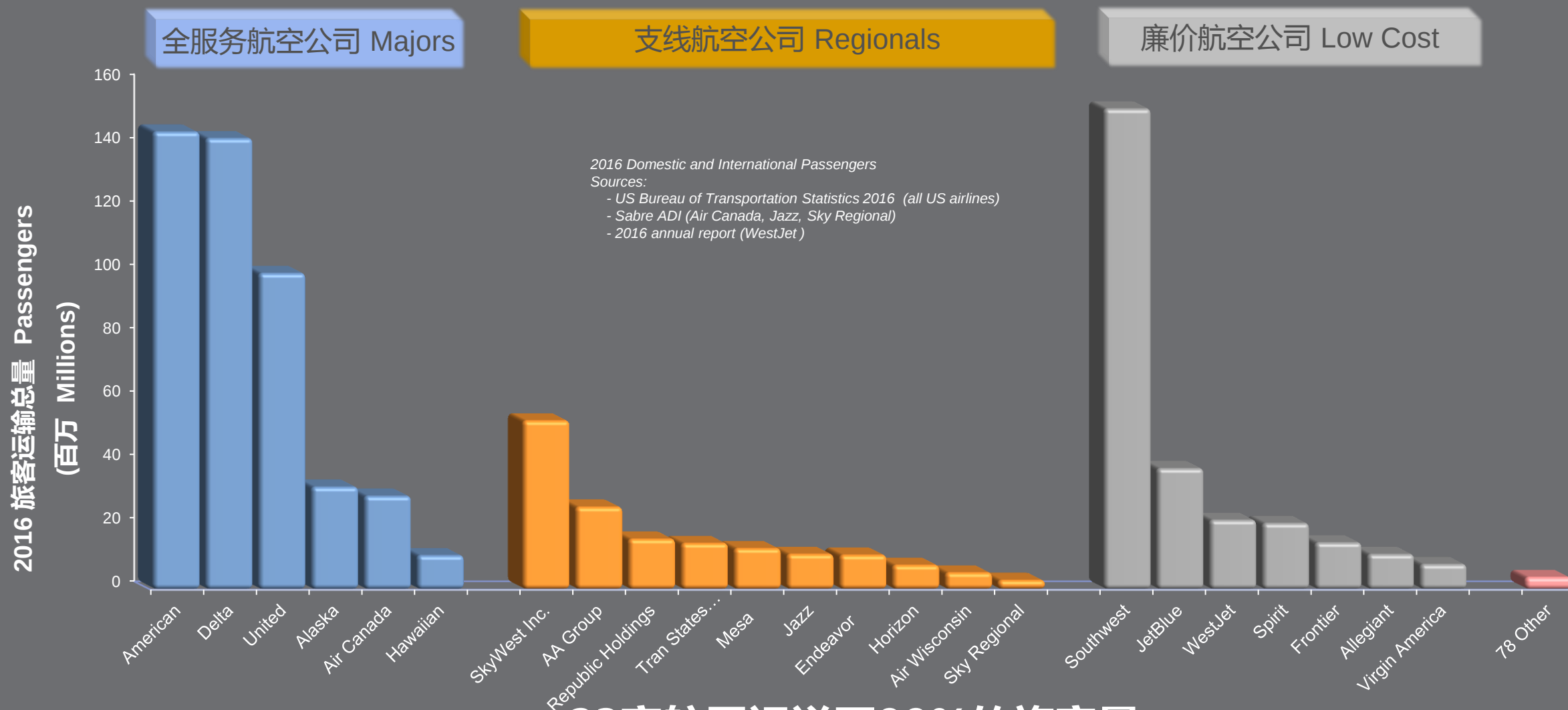
支线航空的重要性 Importance of Regional Segment

发展趋势和挑战 Trends and Challenges

观点总结 Observations

2016年北美各航空公司运送旅客分布

NORTH AMERICAN AIRLINES



23家航司运送了99%的旅客量
23 Airlines Carry Over 99% of Traffic

美国支线飞机机队数量

US REGIONAL FLEET

1,852



2017 支线喷气飞机
数量
regional jets

322

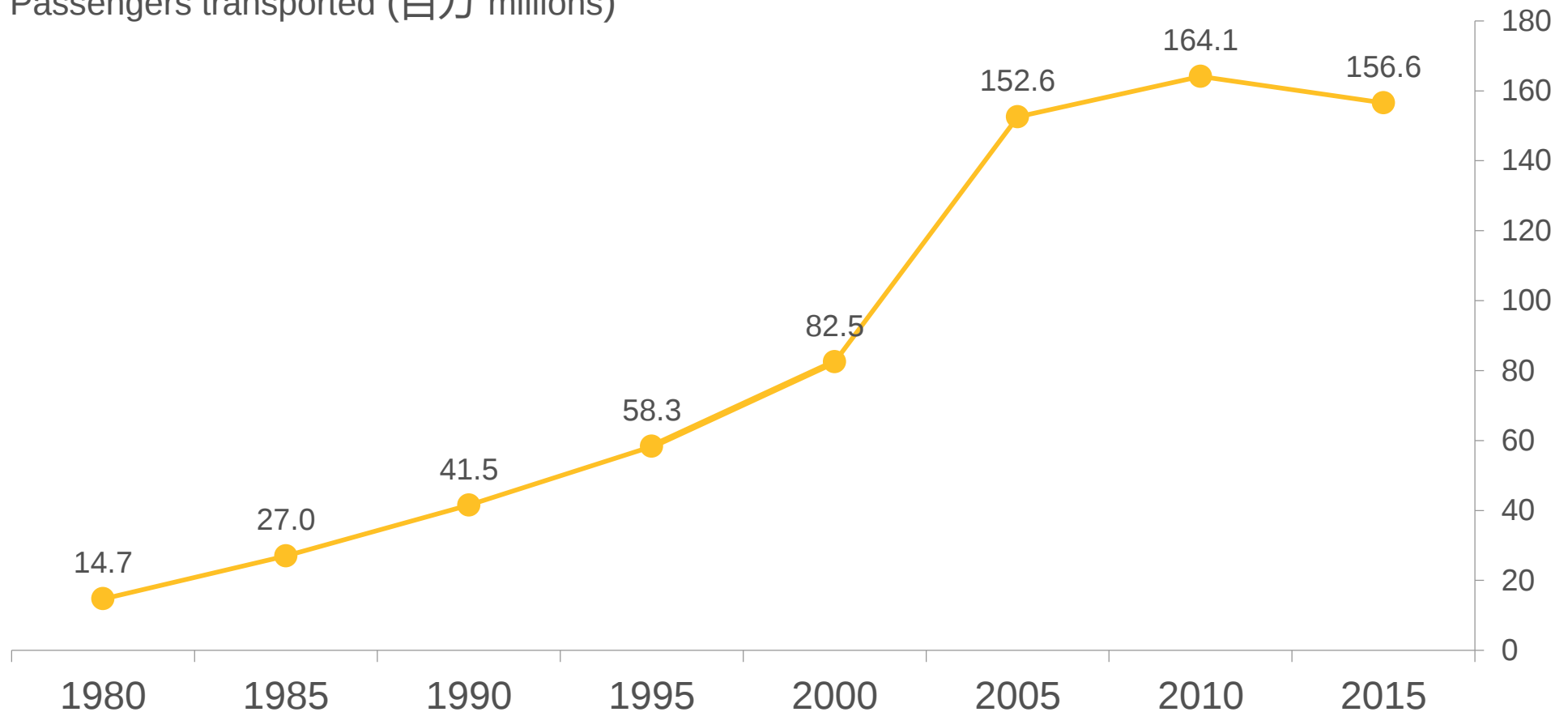


2017 支线螺旋桨飞机
数量
regional turboprops

美国支线航空旅客运输量迅猛增长

US REGIONAL AIRLINES TREMENDOUS GROWTH

旅客运输量 Passengers transported (百万 millions)



Sources
a) InterVISTaS analysis of US DOTForm 41
b) RAA Analysis of Bureau of Transportation Statistics

美国支线航空公司机队不断演化革新

US REGIONAL AIRLINERS

New aircraft size evolved

30 seat Brasilia



50 seat ERJ-145



70-76 seat E170/175

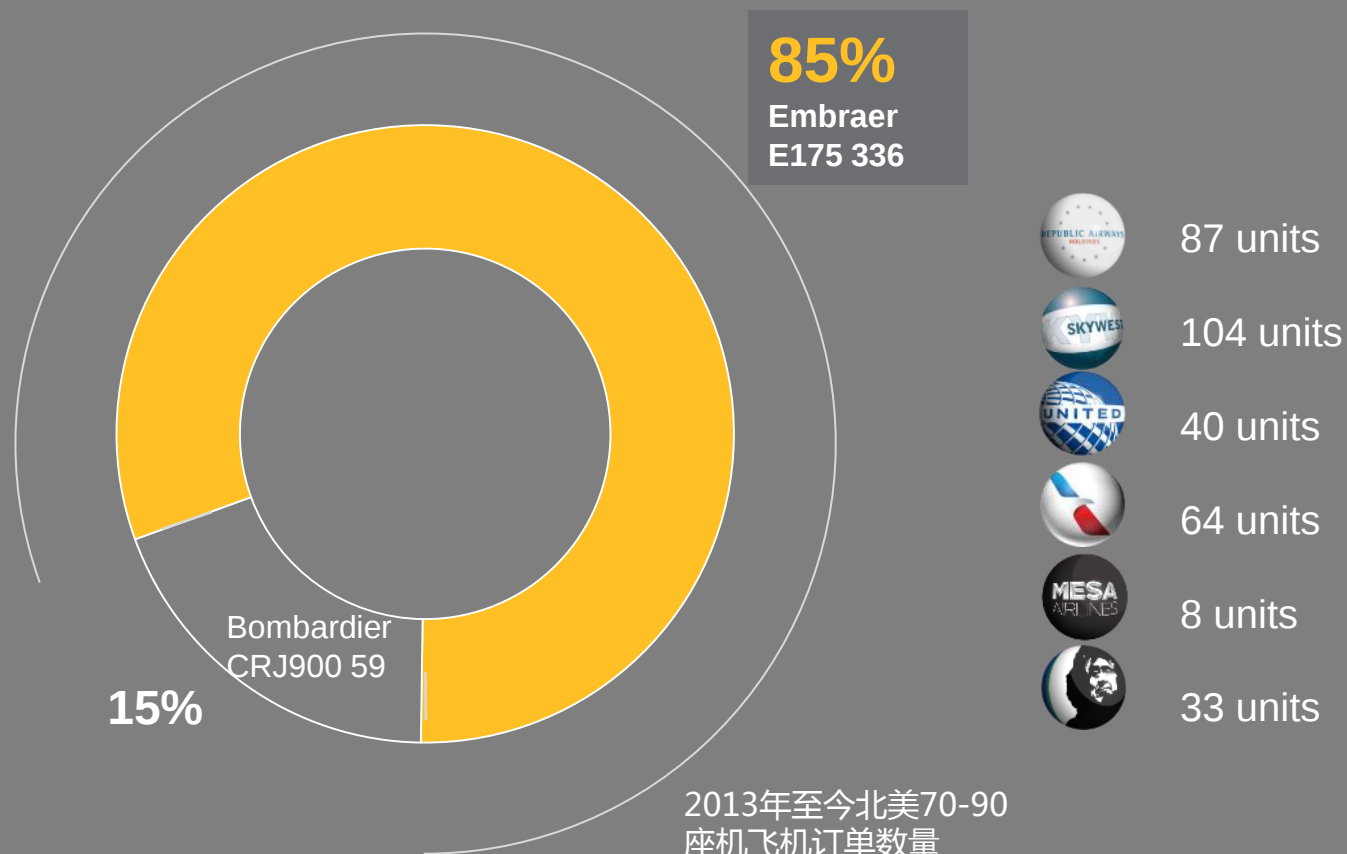


过去五年中美国支线航空公司新飞机订单

US REGIONAL AIRLINE ORDERS – LAST FIVE YEARS

几乎所有航空公司都选择了76座巴航工业公司E175飞机

All 76-seat and dominated by Embraer E175



70 TO 90-SEAT
SEGMENT ORDERS
IN NORTH AMERICA
SINCE 2013

Source: Embraer (Jan/13-Jun/16)

主流航空公司机队中的小型窄体机 MAINLINE SMALL NARROWBODY

E190和E195也可以服务于一些支线市场
E190 and E195 can also serve some of the regional role

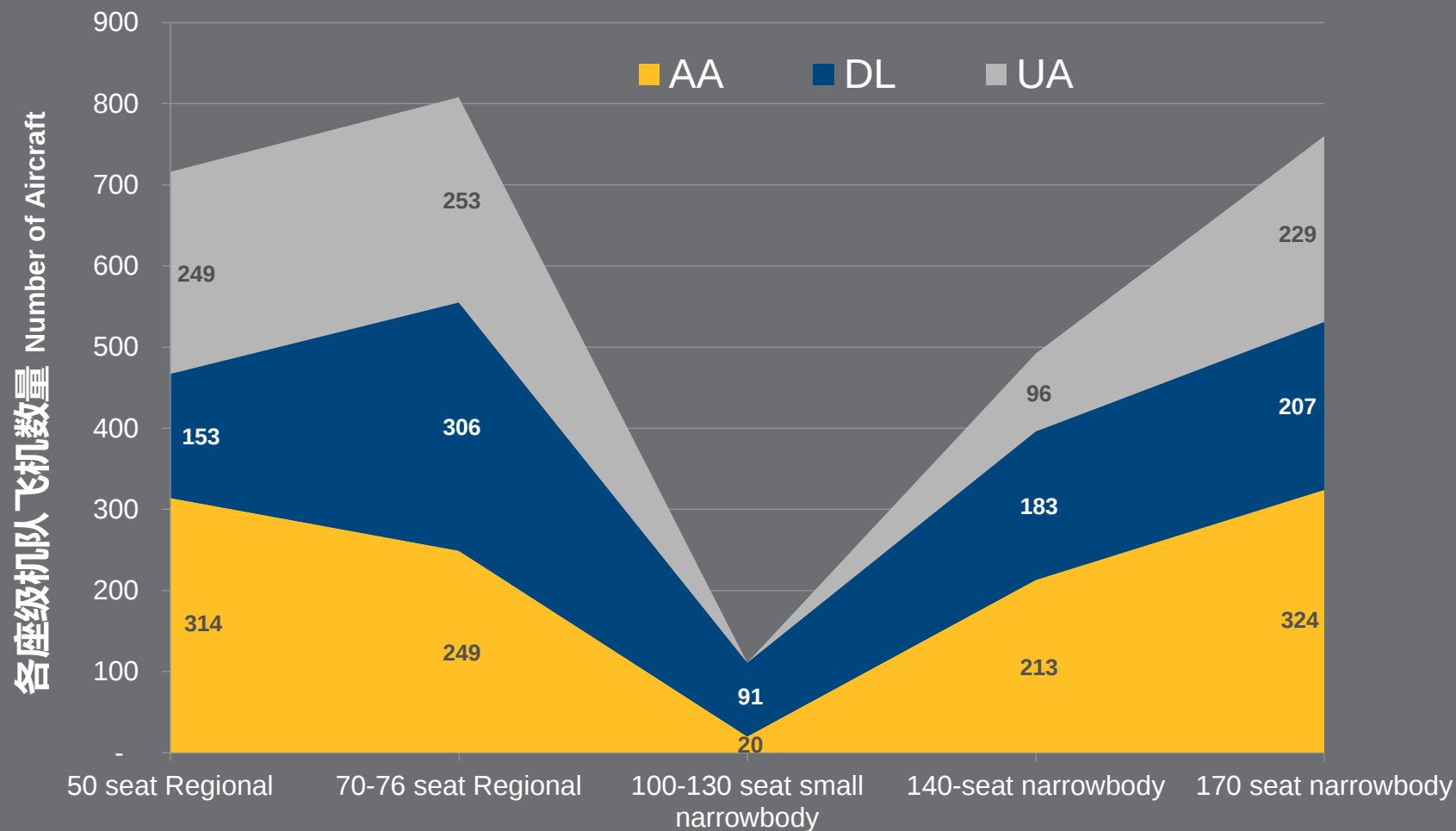
100-130 座位数
SEATS



美国航空公司机队座级分布不平衡

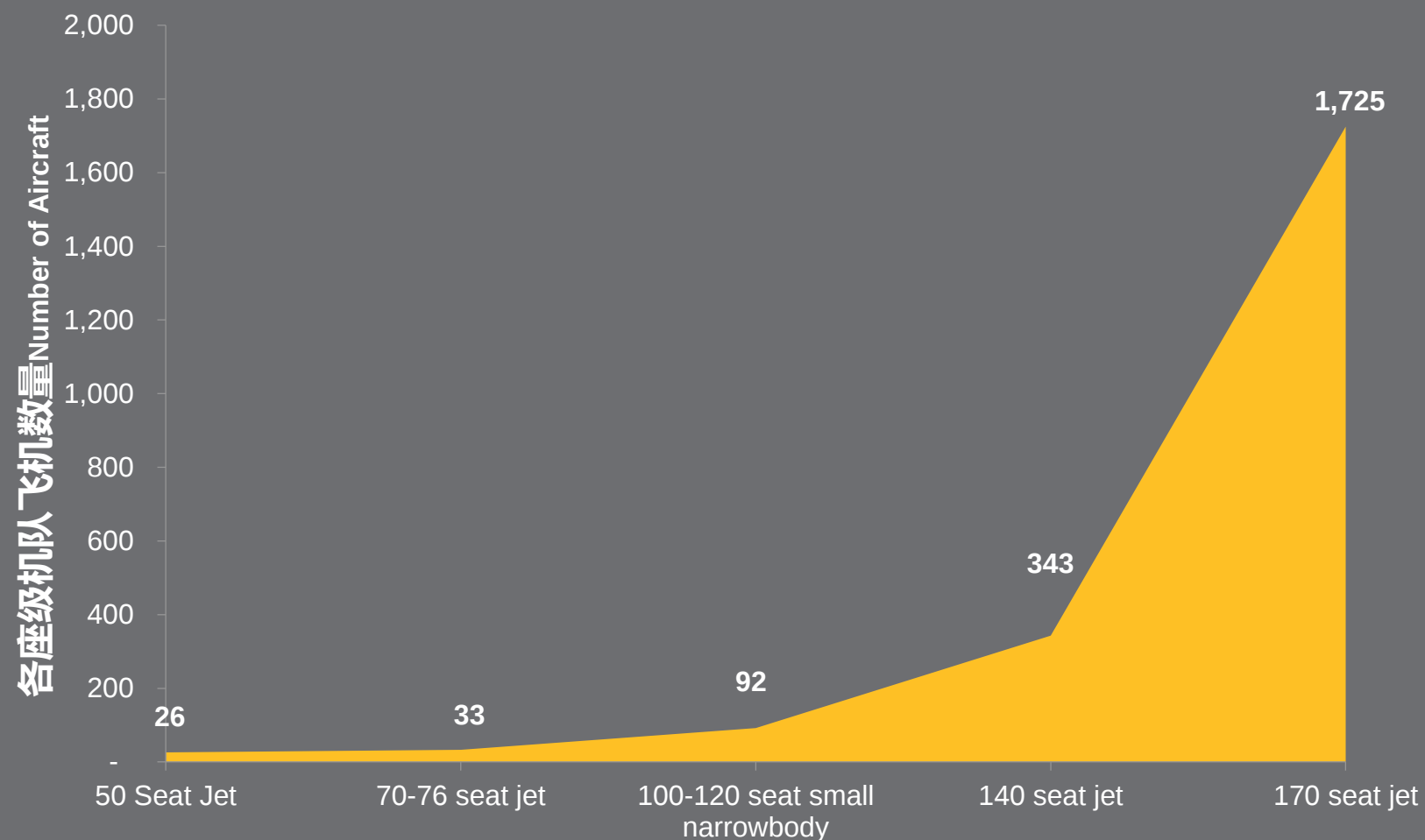
US DOMESTIC FLEET - UNBALANCED

美国三大主流航空公司 Big three US majors



中国航空公司机队组成也存在不平衡的现象

CHINA DOMESTIC FLEET ALSO UNBALANCED



美国支线航空网络成为国内航线网络组成中的重要一环

US REGIONAL AIRLINES ARE NOW PART OF LARGE NETWORKS

- **美国支线航空不再以所在地域来定义**

In the US, regionals are not defined geographically anymore

- **美国支线航空已成为各主流航空公司的合作伙伴，帮助其延伸国内航线网络至国内各个角落**

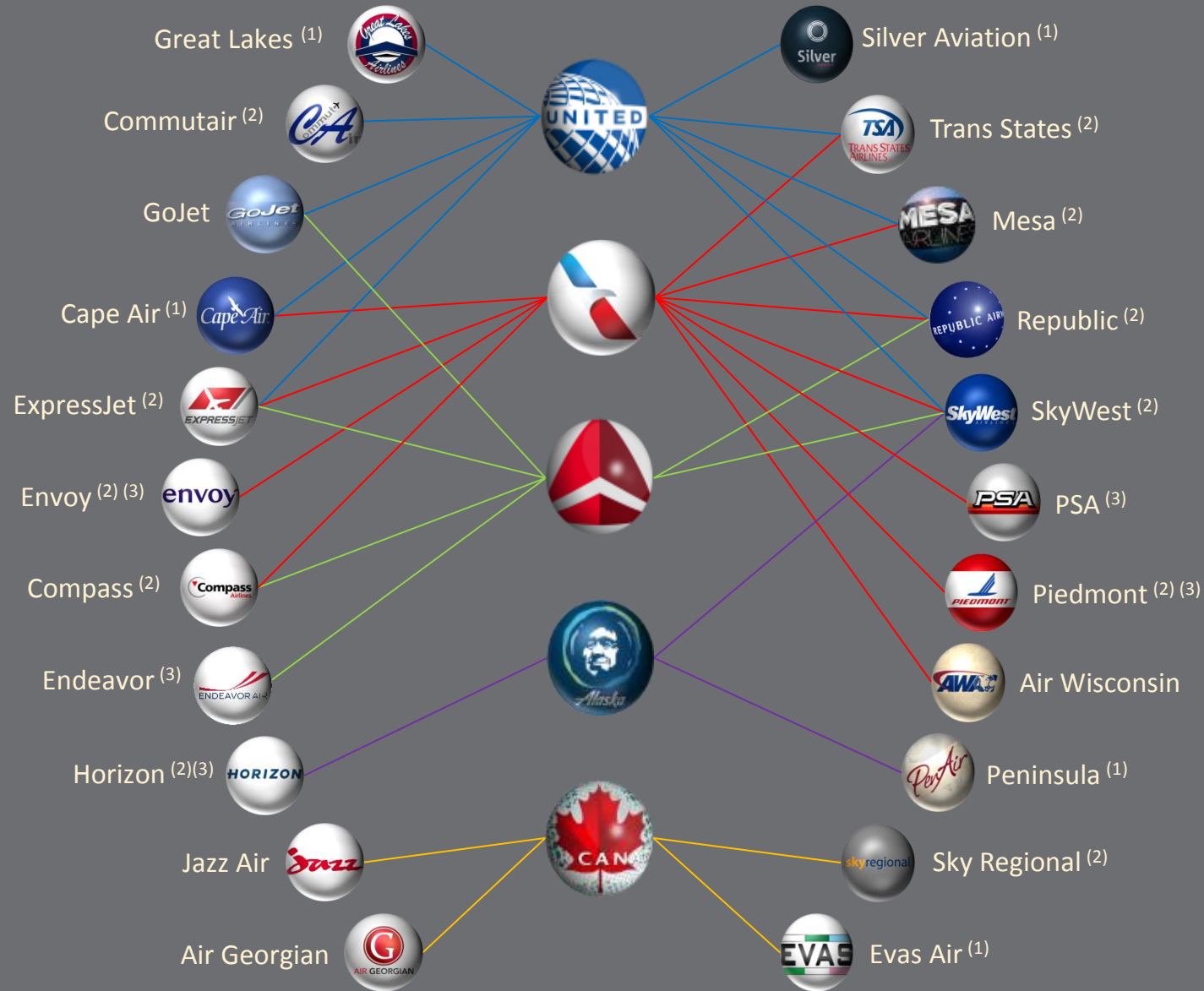
They have evolved, and are now major airline partners, extending the mainline network to smaller cities, and operating throughout the entire country

- **支线航空因此被称为“网络延伸者”**

Regionals should be called “Network Extender”

美国各支线航空和主流航空公司的合作关系网络

US REGIONAL/MAINLINE RELATIONSHIPS



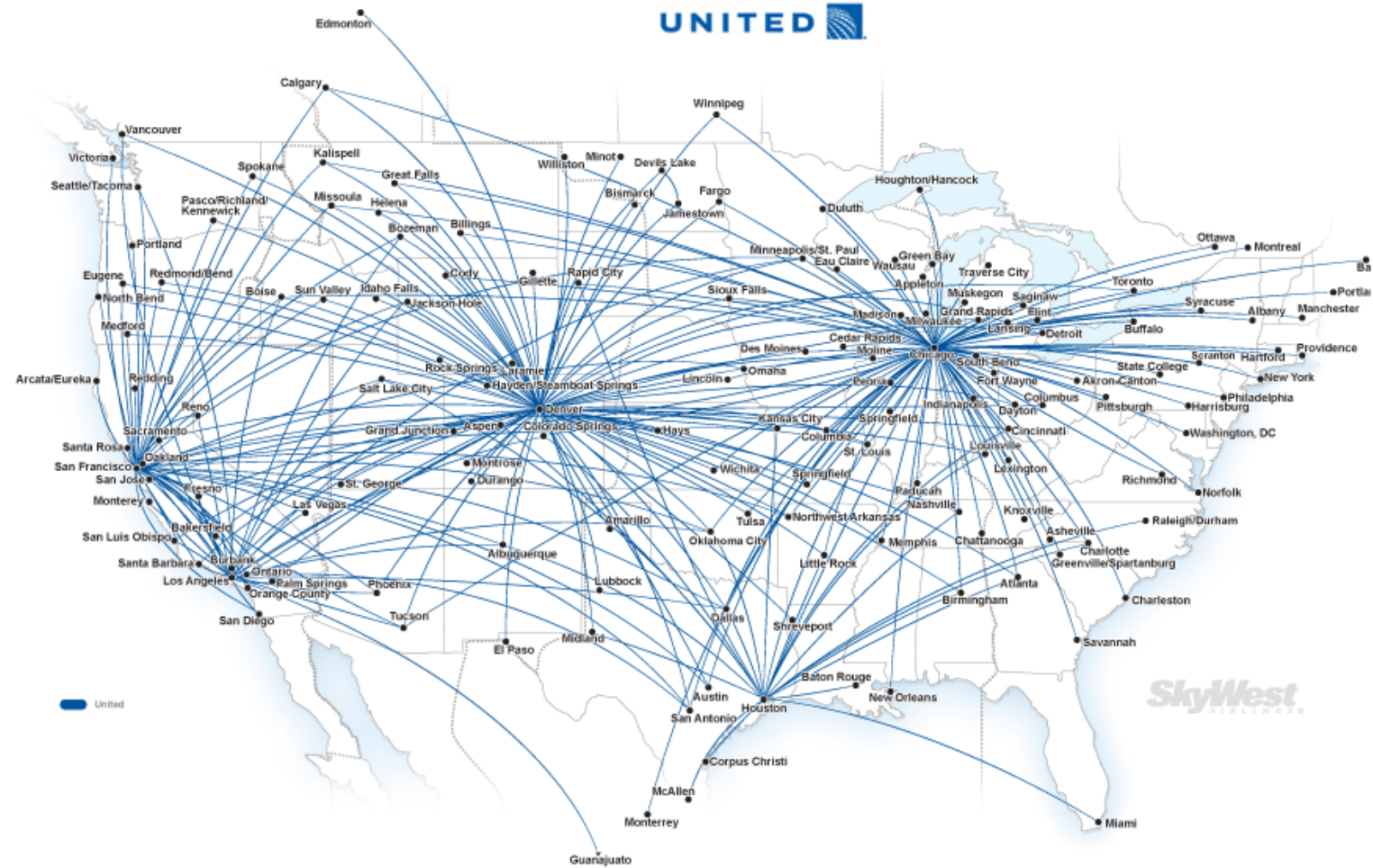
(1) Turboprop only

(2) Embraer operator

(3) Wholly owned subsidiary

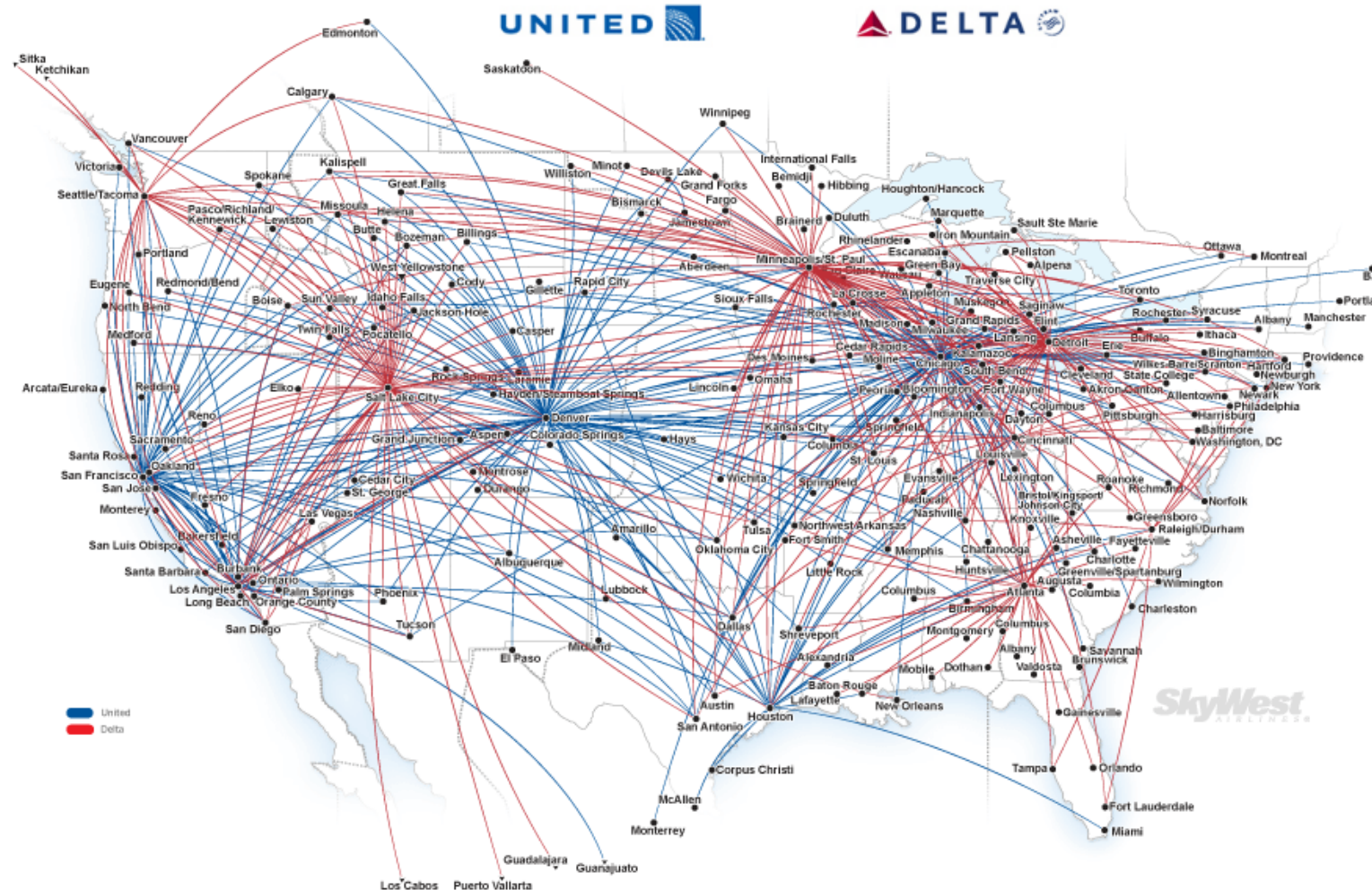
美国天西航空公司 SKYWEST AIRLINES

美国联合航空航线网络的延伸 United Network Extension



美国天西航空公司 SKYWEST AIRLINES

美国联合航空/达美航空航线网络的延伸 United / Delta Network Extension



美国天西航空公司 SKYWEST AIRLINES

美国联合航空/达美航空/美国航空/阿拉斯加航空航线网络的延伸 United / Delta / America / Alaska Network Extension



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Service at U.S. Airports

Regional
airlines provide
service to **95%**



of U.S. airports with
scheduled passenger
service

Regional airlines
provide **EXCLUSIVE**
service to **65%**



of U.S. airports with
scheduled passengers
service

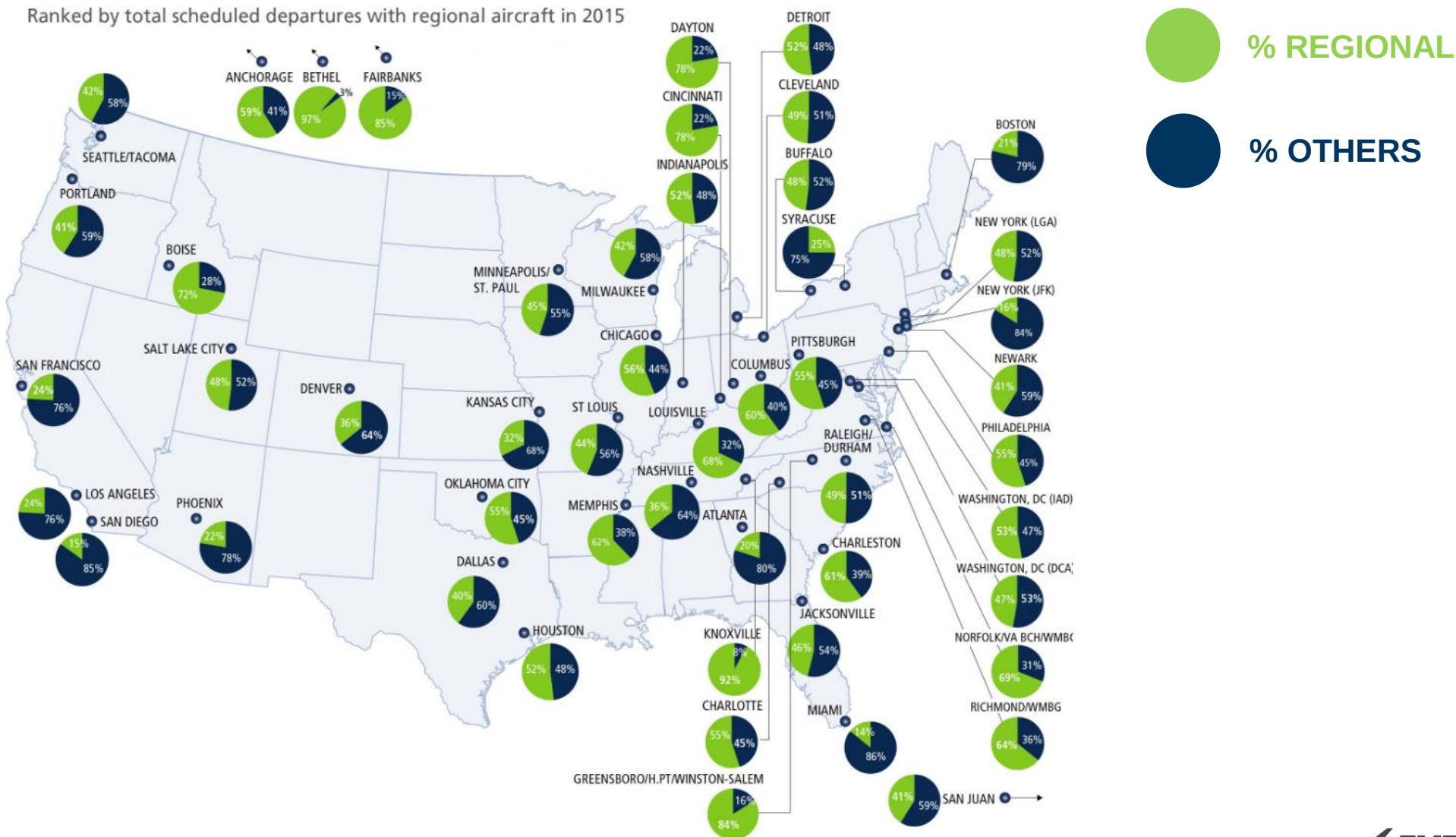
Regional airlines
operated **44%**



of all U.S. scheduled
passenger departures
in 2015

2015年支线飞机定期航班量排名前50的机场

TOP 50 US AIRPORTS



Source: RAA analysis of 2015 OAG schedules via PlaneStats online portal

中国国土面积比美国本土大

A COUNTRY BIGGER THAN CONTINENTAL USA...

然而大部分人口集中在东部和南部区域人口是美国的4倍，集中在国土的半边

... WITH 4 TIMES THE POPULATION CONCENTRATED IN HALF OF ITS LAND AREA*



7,670,343 sq km

(9,147,643 sq km including Alaska)

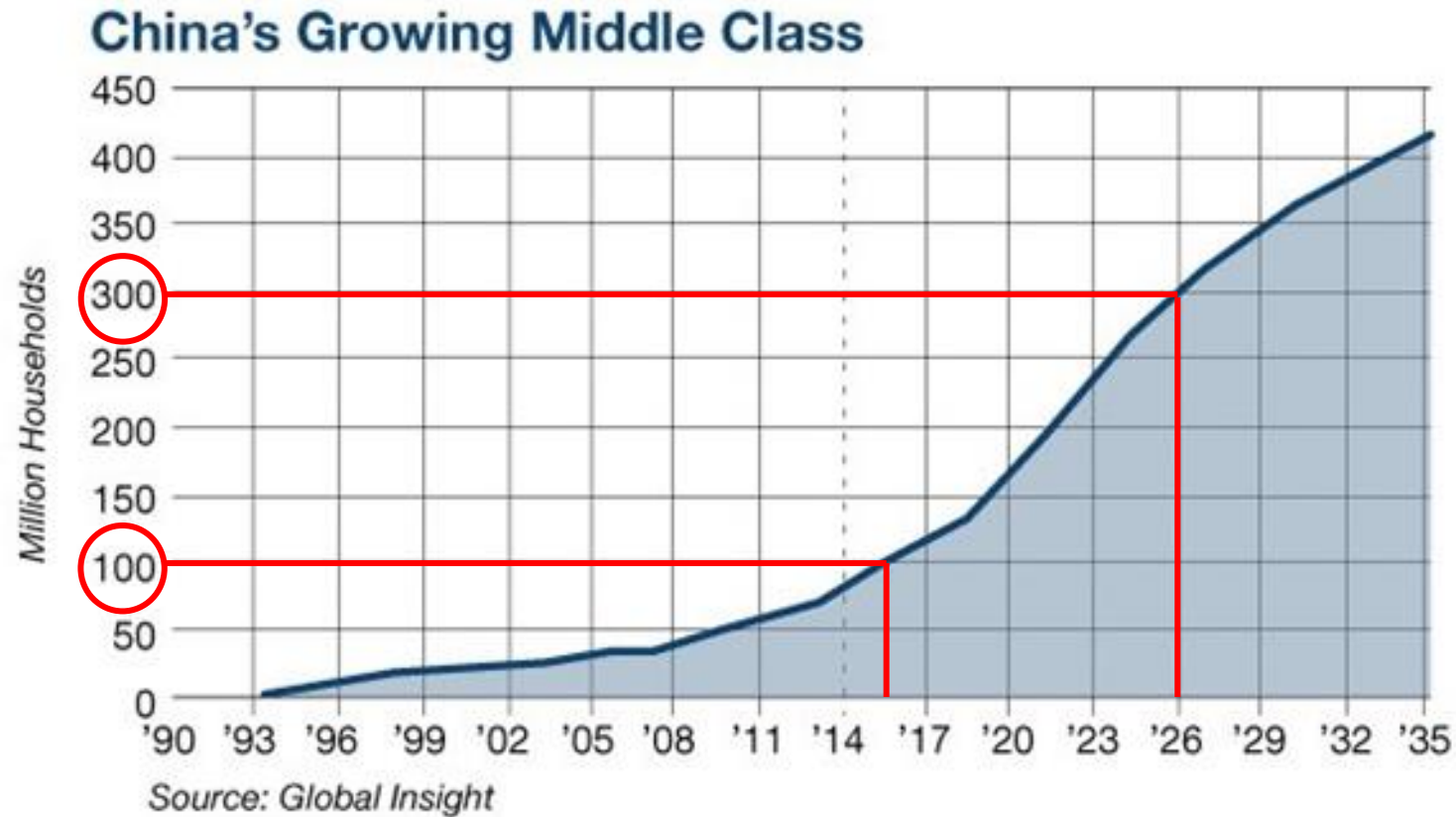
*excludes lakes and rivers



9,326,410 sq km

中国中产阶级在未来10年将增长3倍

CHINA'S MIDDLE CLASS TO GROW 3X IN THE NEXT 10 YEARS



未来十年间将从1亿个家庭增长到3亿个，并且大部分来自二、三线城市

From 100 million to 300 million families

Growth driven by secondary and tertiary cities

十三五发展规划将会兴建64个商用机场

THE 13TH 5 YEARS PLAN FOR AIRPORT CONSTRUCTION

图2 民用运输机场规划布局示意图（2030年）



以2、3线和中西部城市为主，
与不断增长的中产阶层相匹配

Tier 2 and Tier 3 and Inland cities
are pillar, in line with middle class
expansion region

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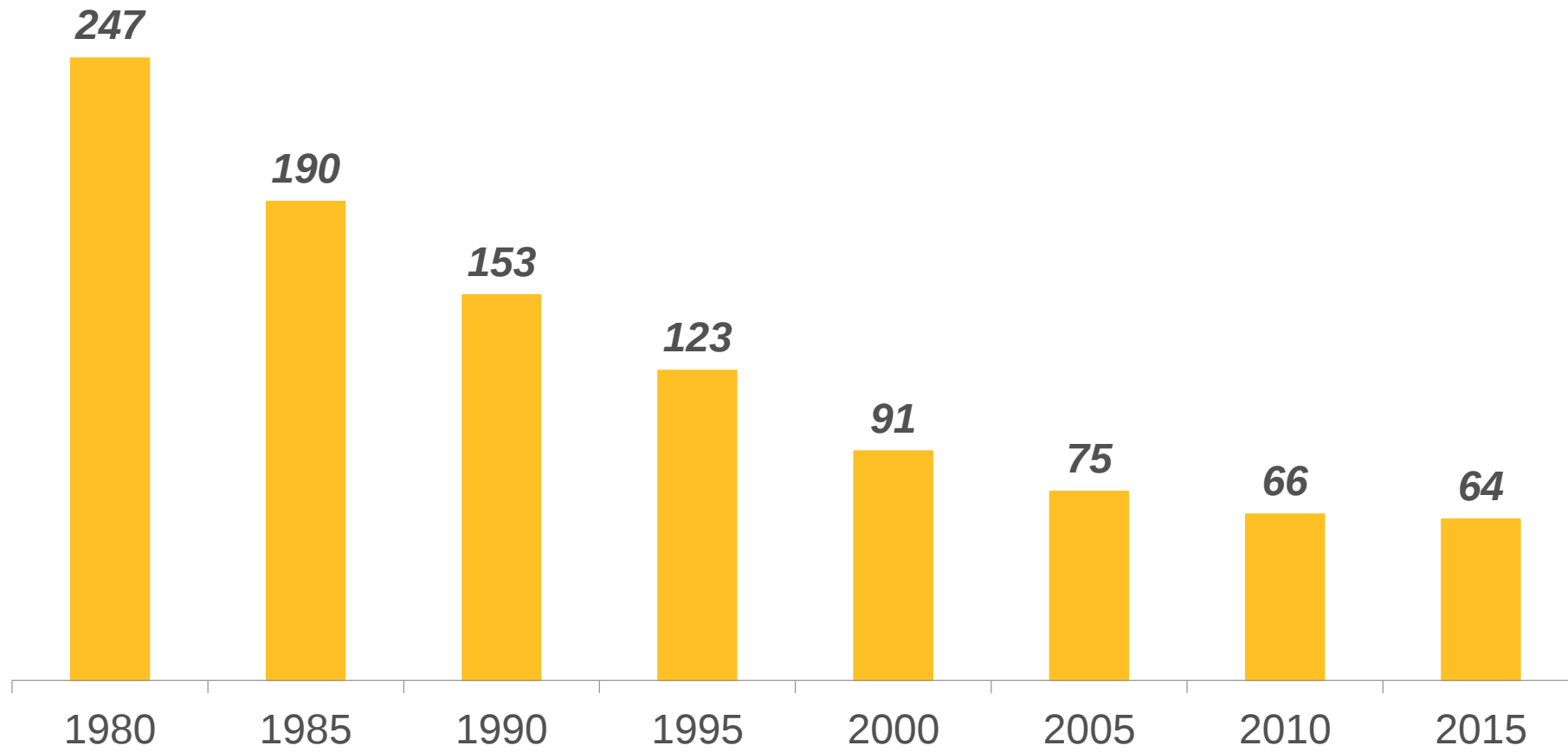
发展趋势和挑战 Trends and Challenges

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美国支线航空公司不断整合壮大

US REGIONAL AIRLINE CONSOLIDATION

支线航空公司数量变化 Number of Regional Airlines

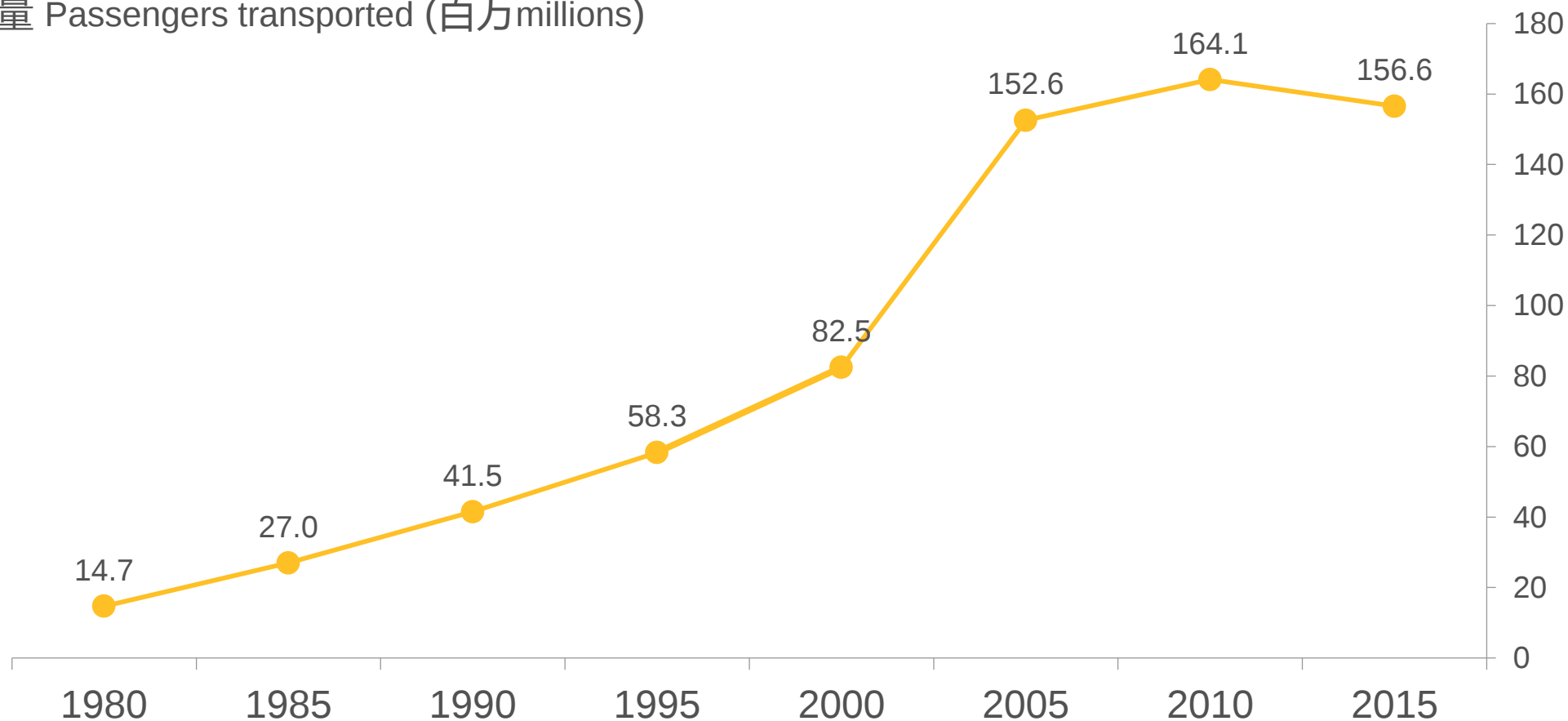


Sources
a) InterVISTaS analysis of US DOT Form 41
b) RAA Analysis of Bureau of Transportation Statistics

美国支线航空市场不断成熟

US REGIONAL AIRLINES MATURE MARKET

旅客运输量 Passengers transported (百万millions)



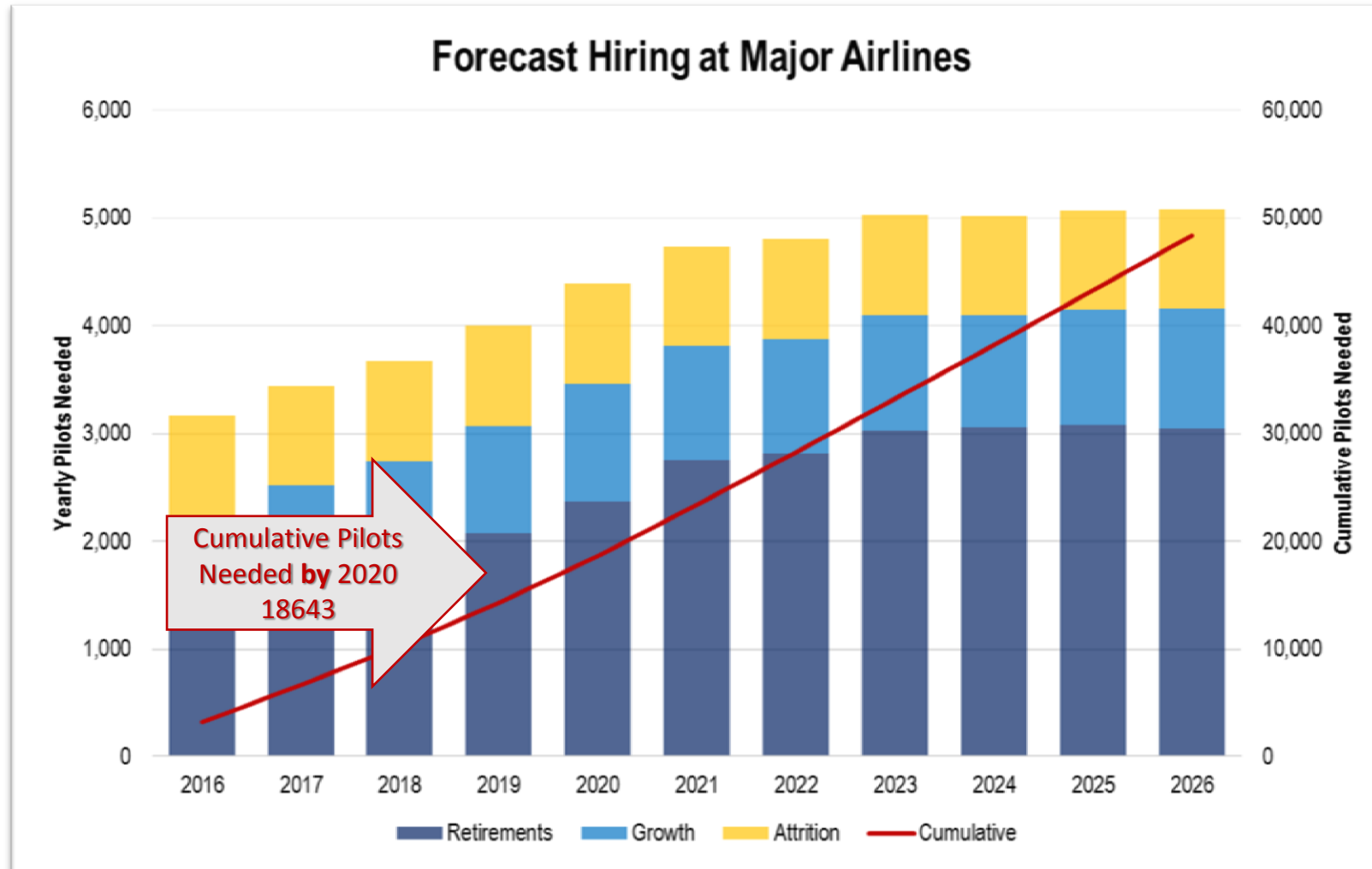
Sources
a) InterVISTaS analysis of US DOTForm 41
b) RAA Analysis of Bureau of Transportation Statistics

美国飞行员数量短缺

US PILOT SHORTAGE

EXTERNAL THREATS

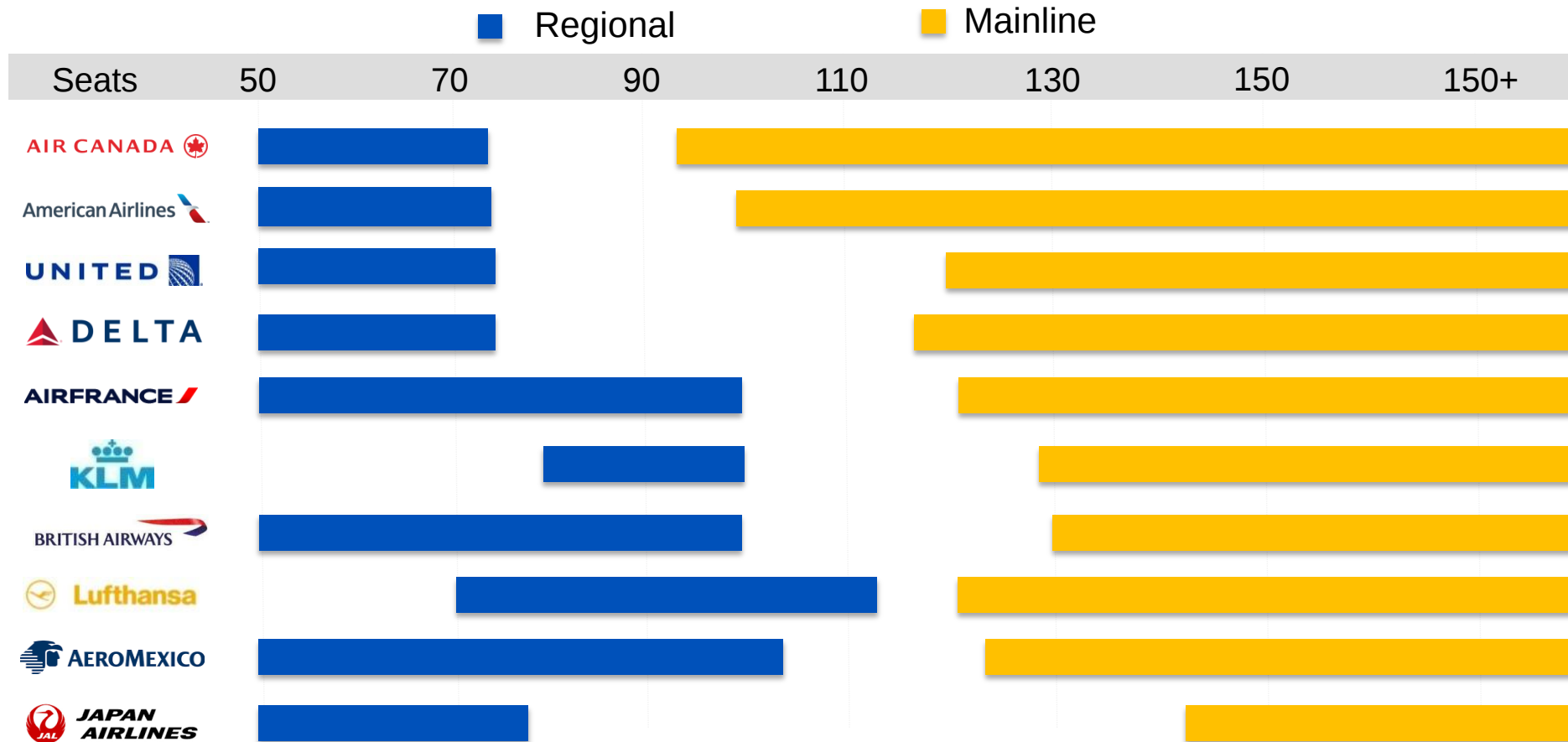
飞行员供应预测 Pilot Supply Forecast



各航空公司座级条款限制

SCOPE CLAUSE RESTRICTIONS

各航空公司内部对支线航空和干线航空区别的定义 Mainline/Regional Relationship



座级条款对航空公司造成不必要的限制并导致运行效率降低

Scope clauses are a bad idea
Create artificial barriers and inefficiencies

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总结

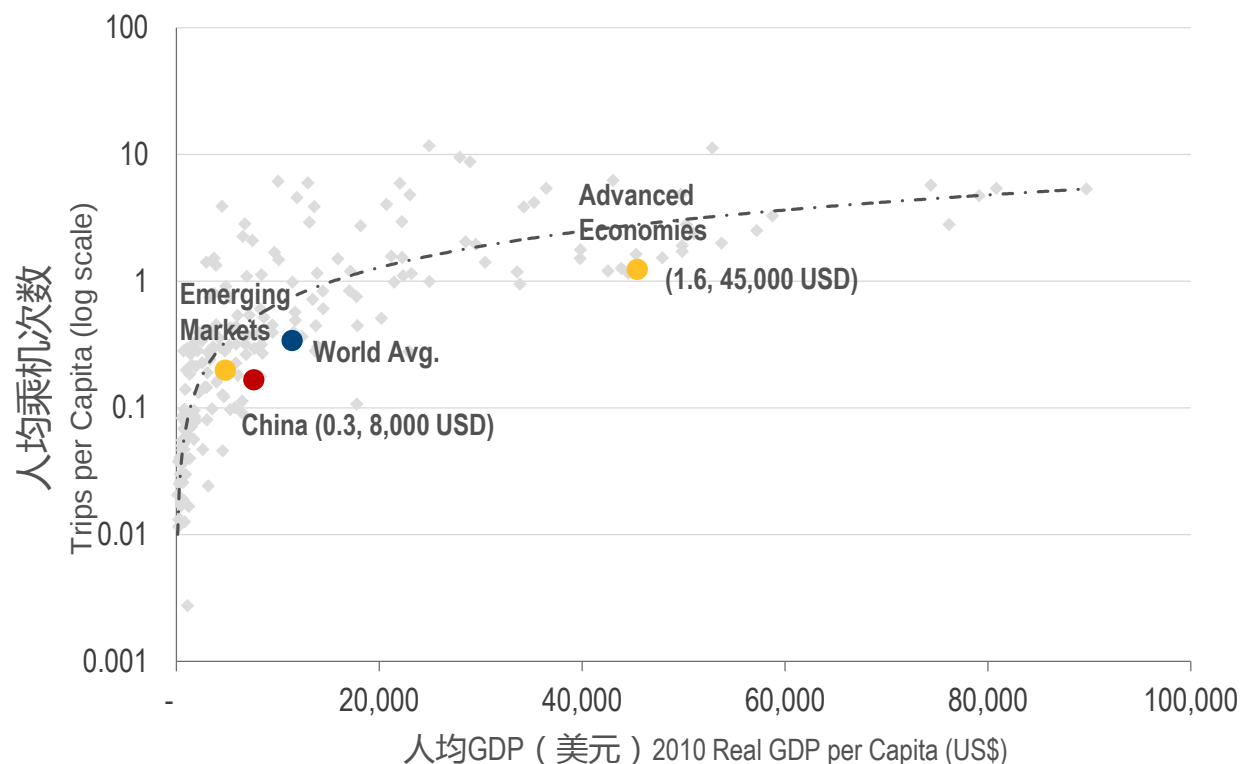
CONCLUSIONS

1. 中国民航增长潜力巨大

Huge potential for aviation growth in China

中国仍是新兴经济体中经济和航空市场高速增长的国家

CHINA IS STILL EMERGING WITH HIGH GROWTH OF ECONOMY AND AIR TRAFFIC



经济增长使得航空出行更易实现

Economic output makes air travel more accessible

中产阶级的崛起激发新一轮的出行需求

More and more people entering the middle class with new demands

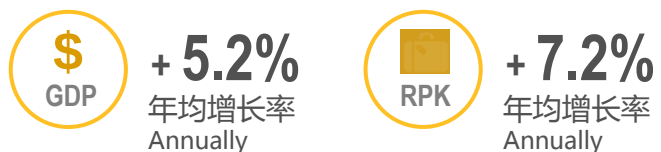
经济增长将给新兴市场的航空运输带来更大驱动力

Air traffic in emerging markets tends to be highly leveraged by economy

中国航空客运量保持高速增长

CHINA MAINTAINS RAPID GROWTH RATE

关键指标 Key Figures (2017-2036 增长率 Growth Rate)



1,070

70-130座级的新交付飞机
J70-130+ New Deliveries

迅速崛起的中产阶级将成为包括航空出行消费在内的消费性支出的主要支柱

Fast-growing middle class to become the main pillar of consumer spending, including air travel.

国内航空公司与其在现有市场形成竞争关系，不如转为开辟新的市场空间和寻求尚未开发的机会市场

Chinese carriers need to shift focus from competing to creating new market space and seeking out untapped opportunities.

70-130座级飞机能解决机队结构不平衡的问题，同时提升航空公司定位以更好应对高铁带来的竞争

70-130-seat jets can solve the imbalance of the fleet, and improve airlines position to complement and compete with High Speed Rail.

中国市场70-130座喷气客机交付量预测 (2017-2036)

COMMERCIAL JETS DELIVERIES FORECAST FOR CHINA (2017-2036)

		在役机队数量 Fleet in Service	预计交付量 Delivery Forecast
		2016	2017-2036
70-90		21	320
90-130		116	750
70-130		137	1,070

数据源：Embraer

总结

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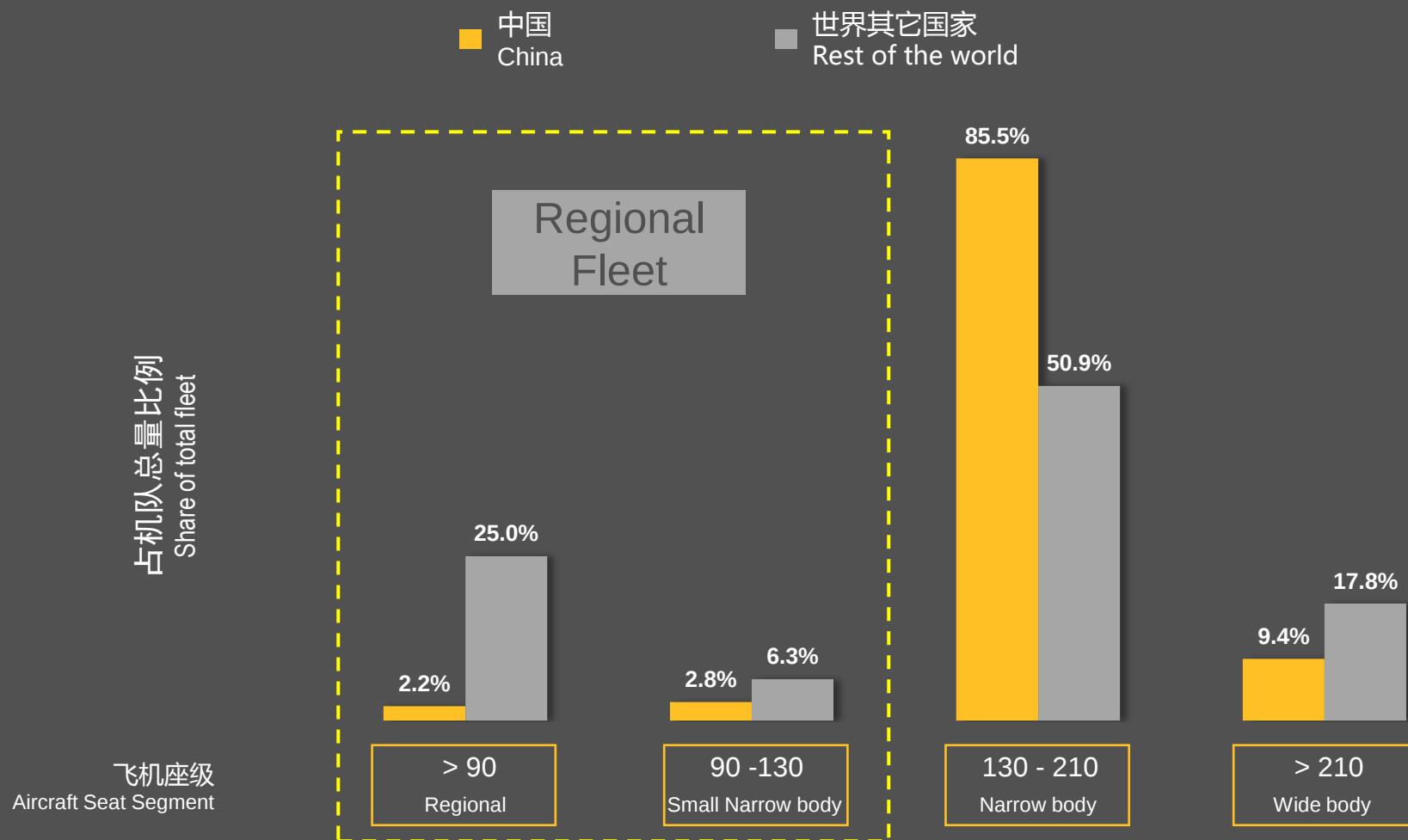
Huge potential for aviation growth in China

2. 需要更多的支线飞机 – 建议占总机队数量的25%-33% (相比现有的5%)

More regional aircraft are needed – guideline of 25%-33% of fleet (up from 5% today)

国内机队结构仍有很大优化空间

CHINA'S FLEET STRUCTURE HAS HUGE ROOM FOR OPTIMIZATION



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3. 开创更多的商业模式

Be open to various business models :

- 更多的小型窄体机执飞干线航线

More small narrow body flying at mainline

- 成立支线航空子公司专门运营支线市场 – 运营相同的航线网络

Regional subsidiary that specialize in regional flying - flying same network

- 共享代码和运力购买等商业模式 – 运营相同的航线网络

Code sharing and Capacity Purchase Agreements – flying same network

支线航空的不同商业模式在中国有很大的发展空间

MORE REGIONAL AVIATION BUSINESS MODELS CAN BE APPLIED IN CHINA

	美国 USA	欧洲 EUROPE	中国 CHINA
运力购买协议 CPA			
子公司 Subsidiary			
代码共享 Code share			
服务分摊协议 SPA			
独立航空公司 Independent regional airlines			



发展较好
Well developed



发展均衡
Medium



发展较弱
Under developed

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Code sharing and Capacity Purchase Agreements – flying same network

4. 巴航工业公司E2系列飞机完美定位于支持中国支线民航事业发展，与现有窄体机机队优势互补

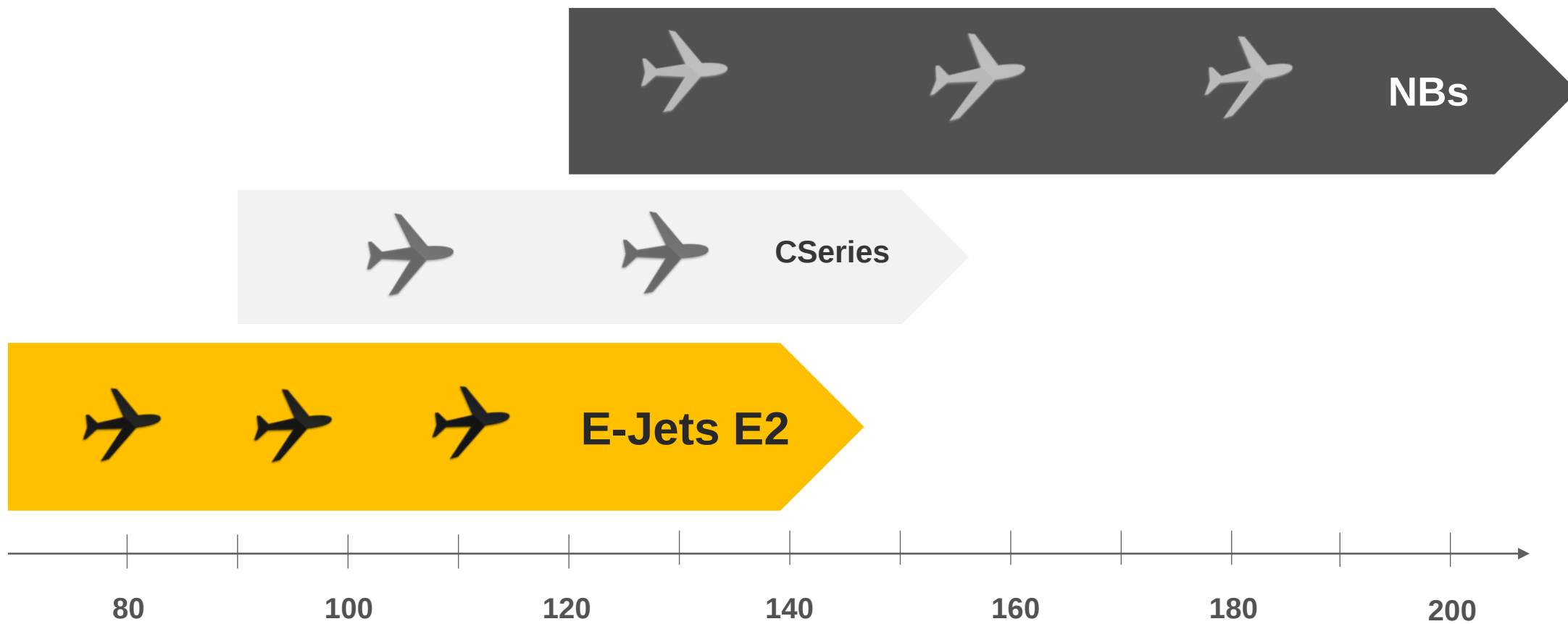
Embraer E2 family perfectly positioned to support China growth and to expand market, complementing the narrowbody

极具竞争力的机型

COMPETITIVE ENVIRONMENT

对传统窄体机队运行的完美补充

BEST COMPLEMENT TO NB OPERATION



双舱
Dual Class

EMBRAER E-JETS



A silhouette of an eagle in flight, wings spread wide, against a dramatic sunset sky. The sky is filled with soft, colorful clouds in shades of orange, yellow, and purple. In the background, a dark silhouette of a mountain range is visible. The overall mood is serene and majestic.

Thank you
谢谢