



The Lufthansa Group – The Way Forward



The Lufthansa Group today

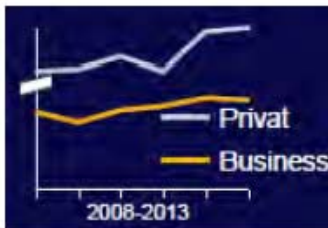


Our action areas

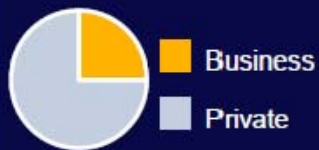


Substantial growth potential in the private travel segment

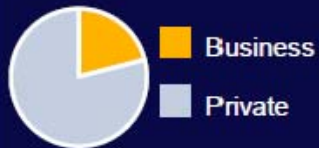
The attractive market segment of private travel from Germany



Private travel is growing faster than the business travel segment



75% of all intercontinental air travel is for private reasons



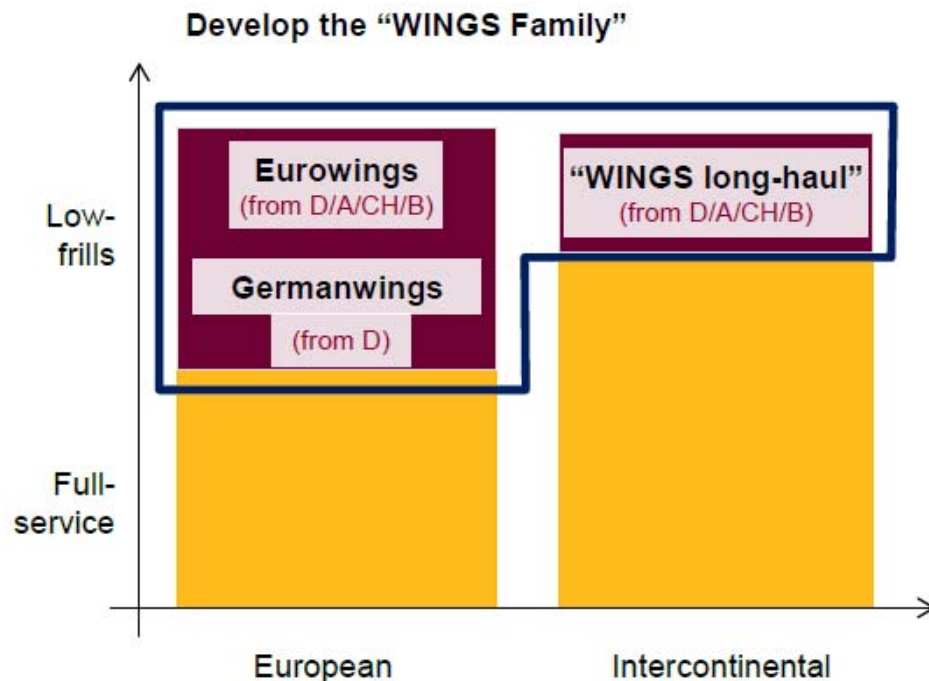
79% of all continental European air travel is for private reasons



Private travel is a highly dynamic segment in both the intercontinental and the European air travel markets. By developing competitive new products and platforms, we aim to gain a greater share of it.

Expanded product for the private travel segment

Market segments from Europe and our product offer



"WINGS" multi-platform for LH Group home markets

Germanwings

- Complete the transfer of non-hub Lufthansa routes as planned by spring 2015
- Expand fleet to up to 60 aircraft

Eurowings ex-Germany

- Replace Bombardier CRJs with 23 Airbus A320s
- Services to begin in spring 2015

Eurowings ex-Austria, Switzerland & Belgium

- First base in Basel with two to four Airbus A320s, with services to begin in early 2015
- Further locations being studied

"WINGS long-haul"

- Low-frills airline under a new brand name
- **Seven Boeing 767s/Airbus A330s** in initial phase
- Services to begin at the end of 2015



Lufthansa is bundling its point-to-point business initiatives and expanding them with the addition of a new low-frills intercontinental carrier.

Complement to the multi-hub and multi-brand product

Combination



Positioning

Uniform management

- Based on Germanwings' success

Complementary

- Complements the existing multi-hub and multi-brand product

Independent

- Separate multi-platform focusing on price-sensitive private travellers

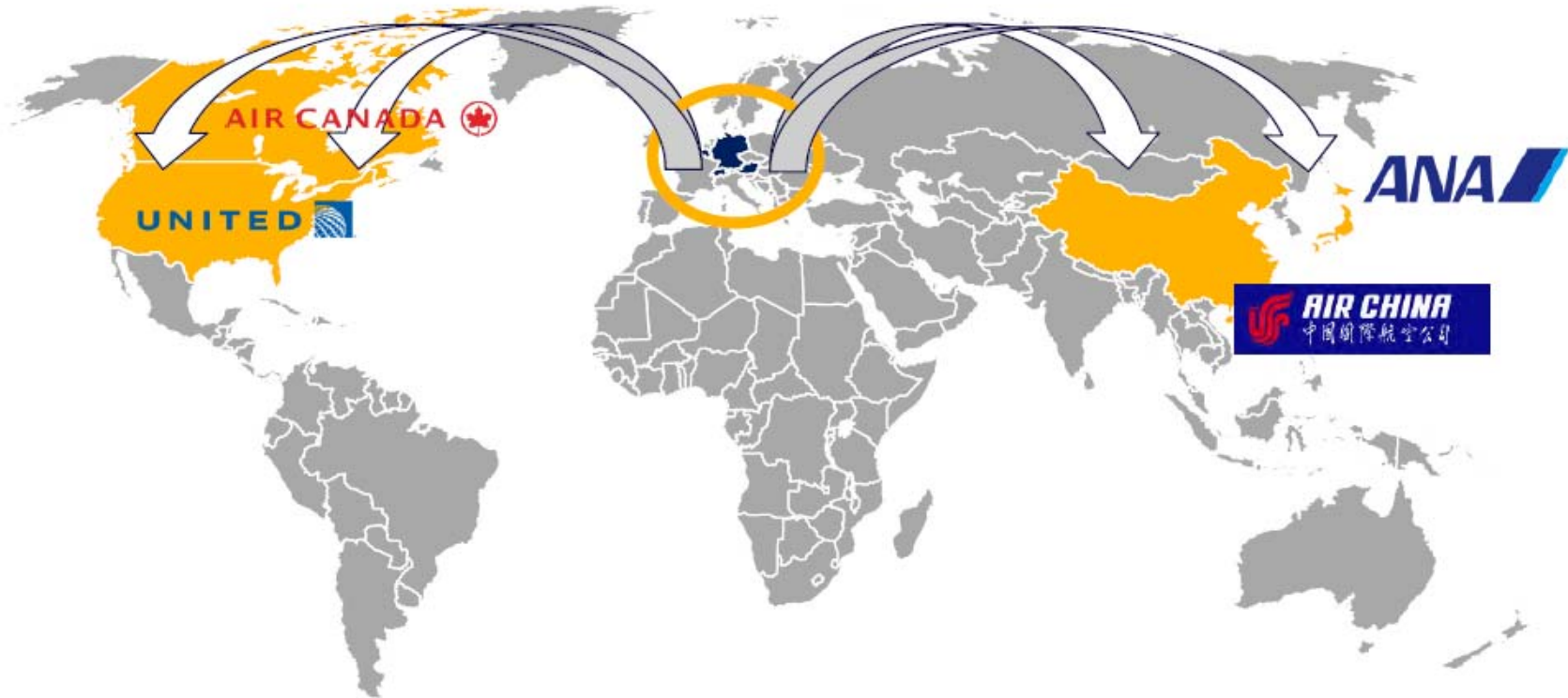


Combination of hub-based and point-to-point products creates omnidirectional service offer from all Lufthansa Group home markets. This will enable us to offer competitive products with which we can play a stronger role in the attractive private travel market.

New concepts
for growth

Intensified joint-venture partnerships with leading airlines

Sharing in the growth of the world's biggest economies



Our joint ventures enable us to **participate in growth beyond our European home markets, exploit synergies** and offer our customers an even **better service** and even **better quality**

