

E系列飞机助飞低成本航空

E-Jets For Low Cost Carriers



ICAO/CAAC低成本航空运输研讨会

ICAO/CAAC Symposium on Low Cost Carriers



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November 2013

低成本航空运营的核心问题

Key Questions for Low Cost Carriers

低成本航空如何选择好的市场？

What are the good markets for LCC ?

针对这些市场如何选择合适的飞机？

What are the right aircraft for those markets?

如何为乘客提供有价值的服务？

How to bring value to customers ?

巴西蔚蓝航空的成长

The Journey of Azul

2008. 122 架 E195 开始服务 3 个城市
2 E195 covers 3 cities

2009. 08 搭乘第 1 百万位旅客，世界成长最快的航空公司
Carriers 1 millionth passenger, fastest growing
airline in the world
2010. 05 入选世界 30 最炙热品牌之一

One of 30 hottest brands

2012. 05 蔚蓝航空与旅途航空合并
Merge with Trip

2012. 09 搭乘第 2 千万位旅客
20 million passengers carried

2012. 12 选为世界最佳低成本航空公司 (by CAPA)
Best Low-Cost Airline in the world (by CAPA)

2013. 07 3 次获得拉美最佳低成本航空公司 (by Skytrax)
3 times Best Low-Cost Airline in the Latin America
(by Skytrax)



蔚蓝航空的成功经验 #1: 寻找“蓝海”市场

Azul Success Factor #1: Find the “blue sea”

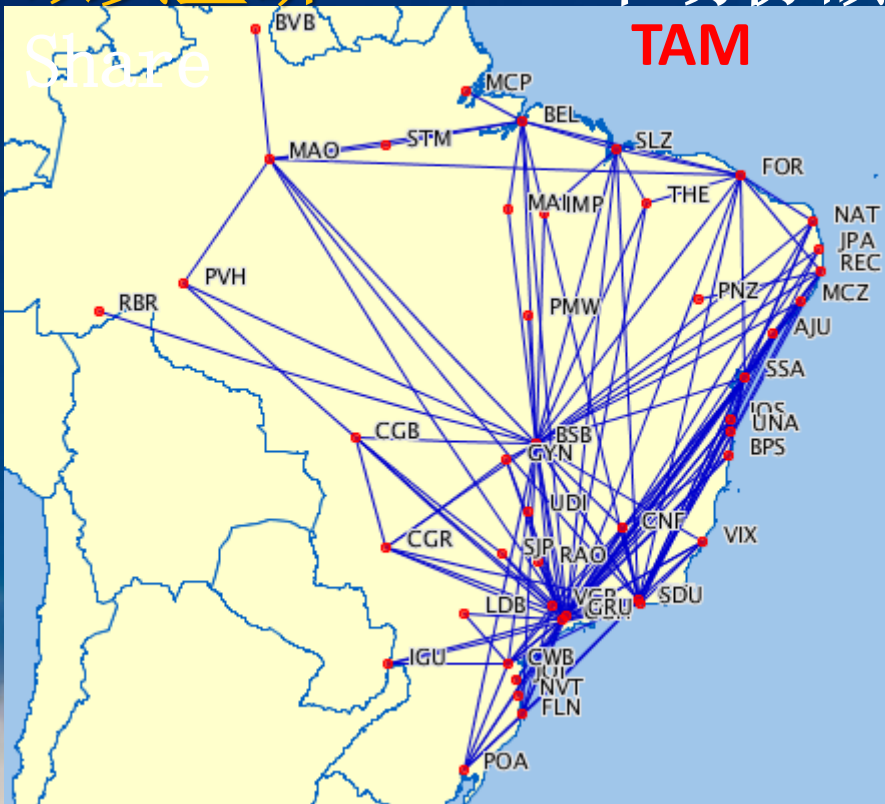
markets

- 开辟新市场

Develop new markets

- 通过差异化服务进入和刺激现有市场
- Compete in and stimulate existing markets using differentiated products

双头垄断 : 93% 市场份额



Duopoly : 93% Market

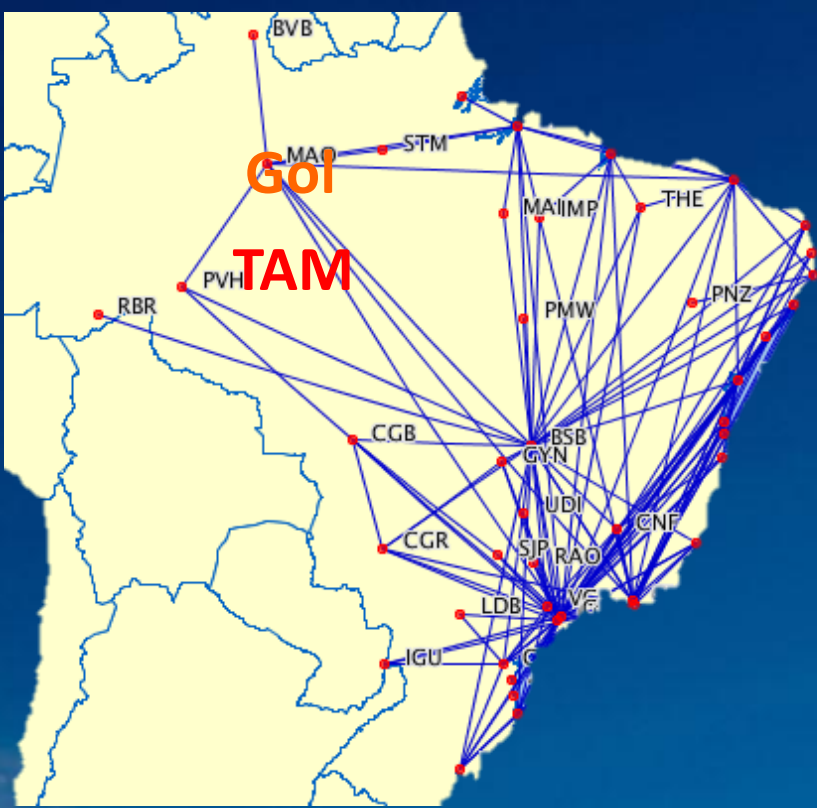


蔚蓝航空的成功经验 #1: 寻找“蓝海”市场

Azul Success Factor #1: Find the “blue sea” markets

蔚蓝航空成立前 Before Azul • 蔚蓝航空成立后 After Azul

45 个通航机场 Destinations 105 个通航机场 Destinations



寻找中国的蓝海市场

Find Chinese Blue Sea markets

50% 机场少于10个通航点
<10 Destinations Served

50% 机场每天少于4个航班
<4 flights per day

330

国内及区域国际未通航市场
Un-served domestic and regional international markets



总计185个民航机场中：
Within the total 185

- 通航城市 Destination Served <10
- 通航城市 Destination Served 11-40
- 通航城市 Destination Served 41-70
- 通航城市 Destination Served 71-100
- 通航城市 Destination Served >101

蔚蓝航空的成功经验 #2: 使用合适座级的飞机

Azul Success Factor #2: Use Right-sized Aircraft

- 用于开辟更多直达航线: 从2008年开航时的 **2条** 到2013年的 **120条**
- 把一个中型城市Campinas发展成一个枢纽 (Campinas 位于圣保罗北100公里)
- 支持航班量快速增长: 2009年 的 **23,000班**到2012年底的 **220,000班**
- 运力更好匹配需求: 巴西**85%**的国内航班客流量为 **60-119**
- 能够在中低流量的市场上获利, 竞争对手150-180座级机型太大了
- 能够提供多班次: 多过竞争对手班次, 吸引高收益旅客, 更好衔接枢纽
- 独占市场, 在受限制机场能享独家地位



蔚蓝航空的成功经验 #2: 使用合适座级的飞机

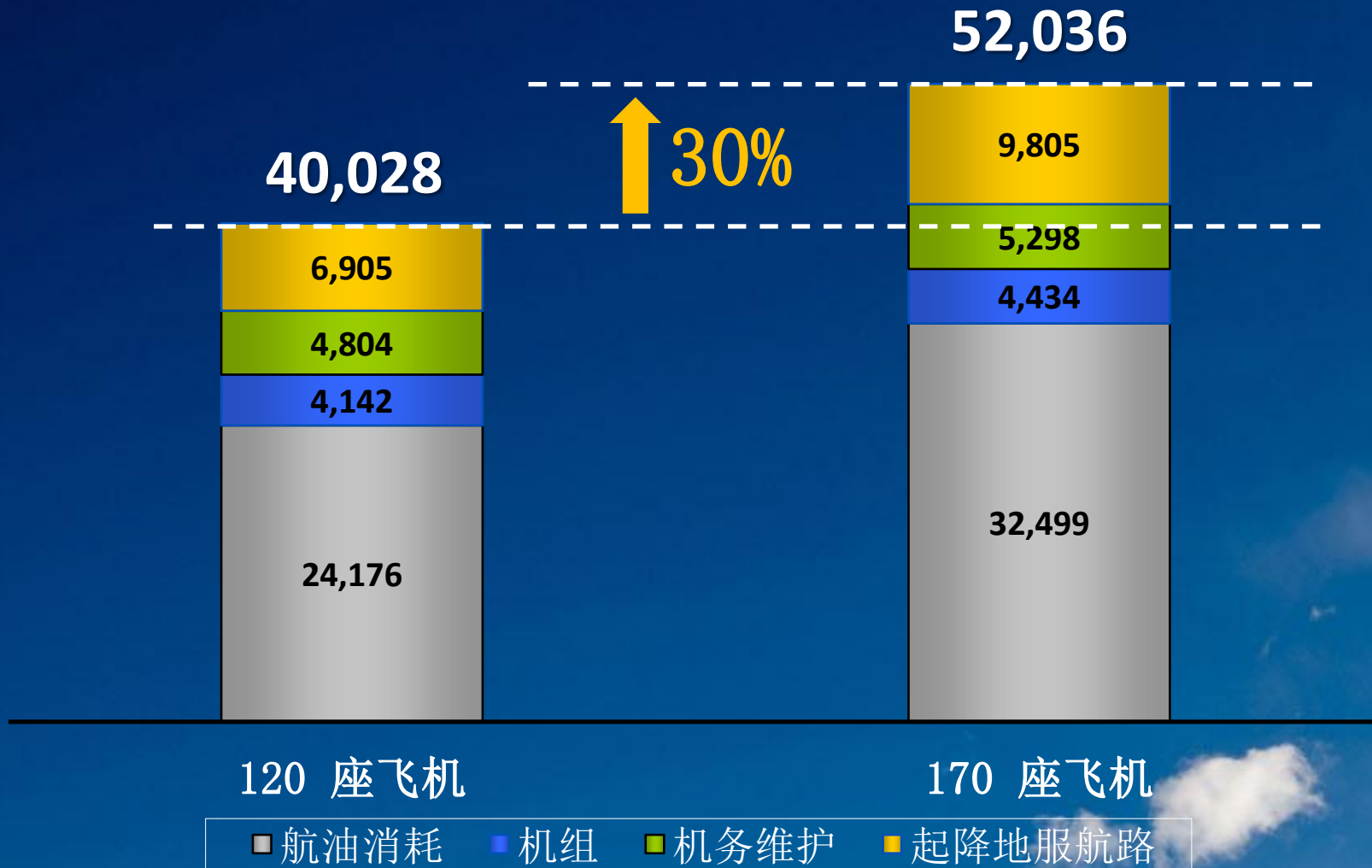
Azul Success Factor #2: Use Right-sized Aircraft

- Entering new markets: 2 city pairs in 2008 to 120 city pairs in 2013
- Turning Campinas (100 km north of Sao Paulo) into a hub Airport
- Supporting rapid growth: 23,000 flights in 2009 to 220,000 flights in 2012
- Optimizing capacity: 85% Brazil domestic flights demand of 60-119 pax
- Profitably serving markets too small for competitors' 150-180 seaters
- Offering more frequencies than competitors: more flexibility and attractiveness to high yield customers; better connections at hubs
- Dominate the markets especially in restricted airports



变动成本对比

Variable Cost Comparison



Assumption 假设条件

典型航段距离 Typical Length 100km

航油价格 Fuel Price 7500 元 CNY /吨 Ton

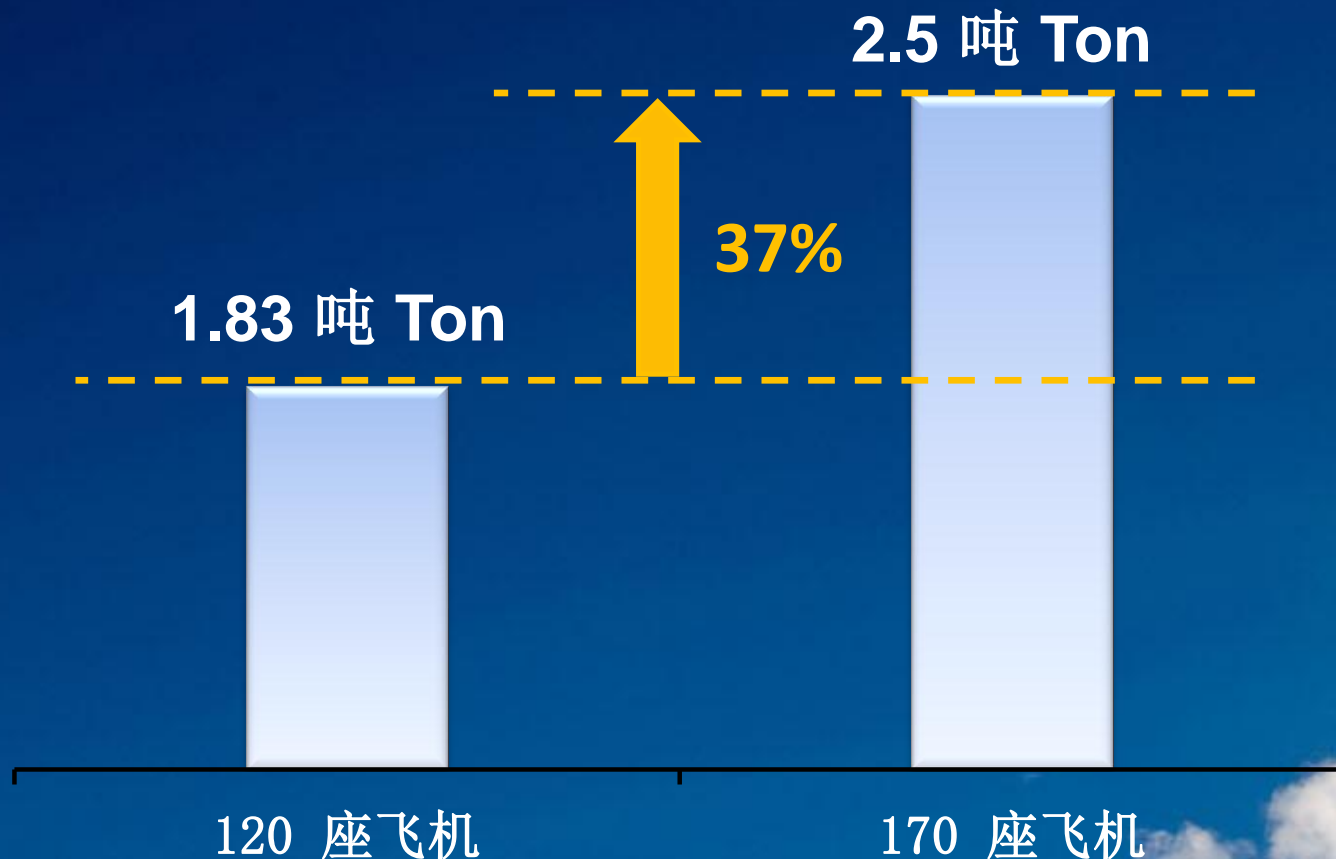
机组薪水 (机长/副驾驶/空乘) 120/40/12万元 *10,000 CNY

Crew Wage (CAP/FO/FA)



油耗对比

Fuel Burn Comparison

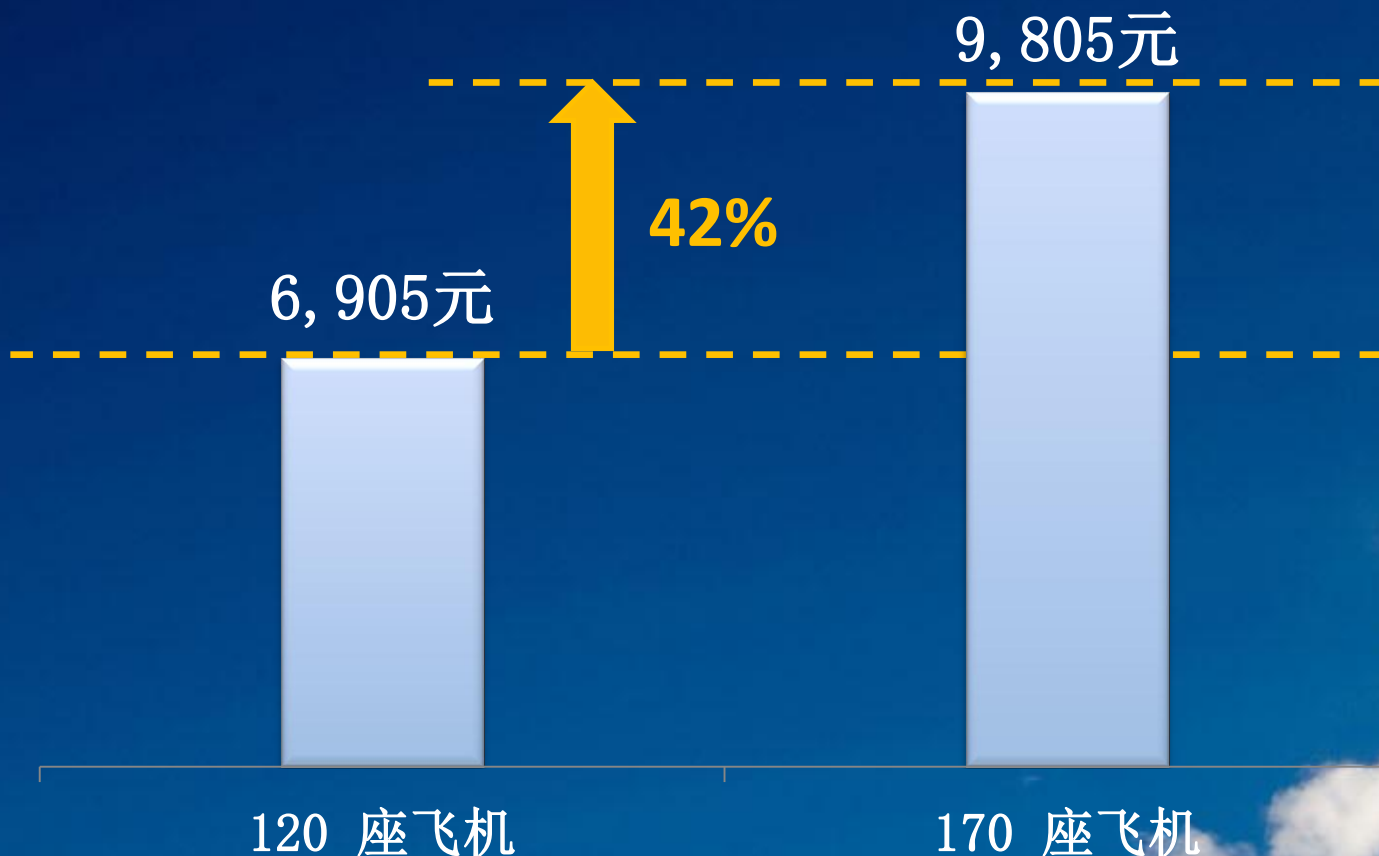


典型航段 Typical Length 1100km,
每轮挡小时油耗 Fuel burn per block
hour



起降地服航路费对比

Airport & Navigation Fees Comparison



按二类机场，客座率 75% 测算
CATII, Load factor 75%



利用率能更高

Higher Utilization

过站时间小于20分钟

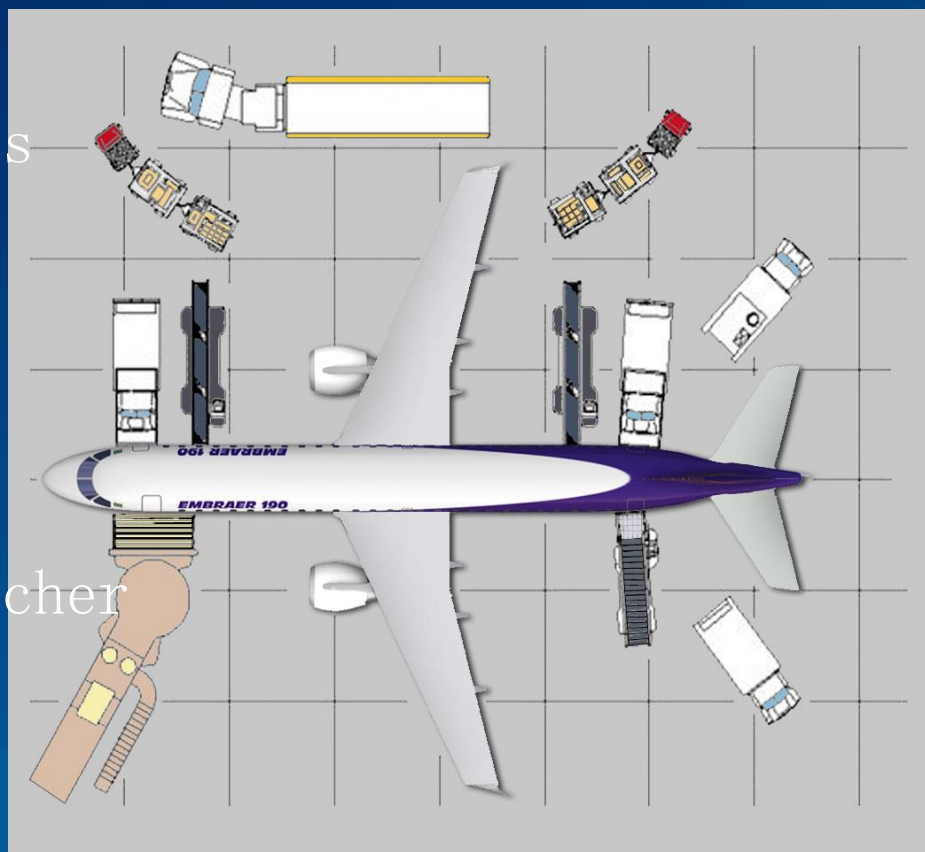
Turn time less than 20 minutes

维修间隔更长

Longer maintenance intervals

无需跟机放行

No transit maintenance dispatcher

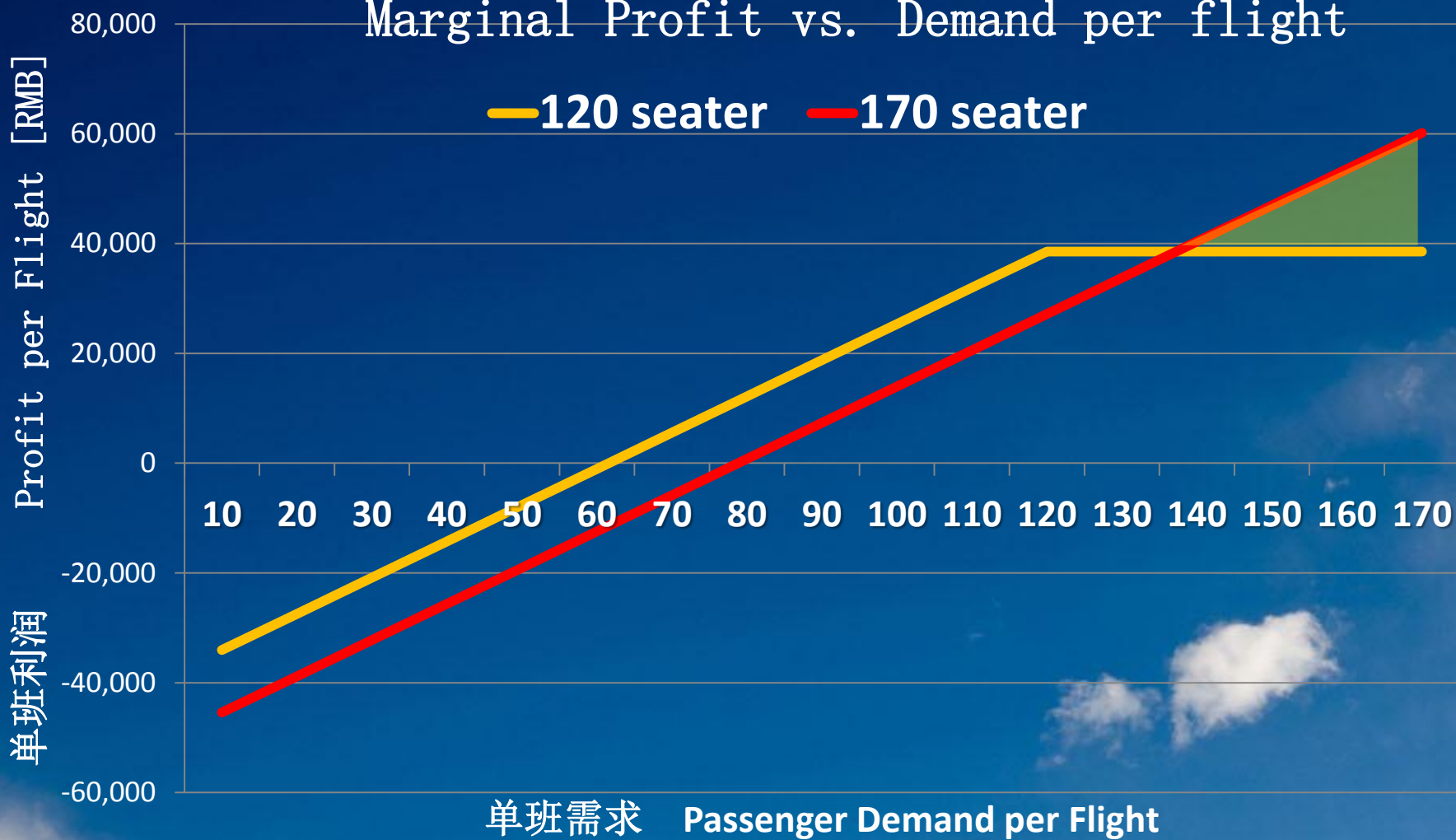


每旅客成本更低

Cost per Passenger is Lower

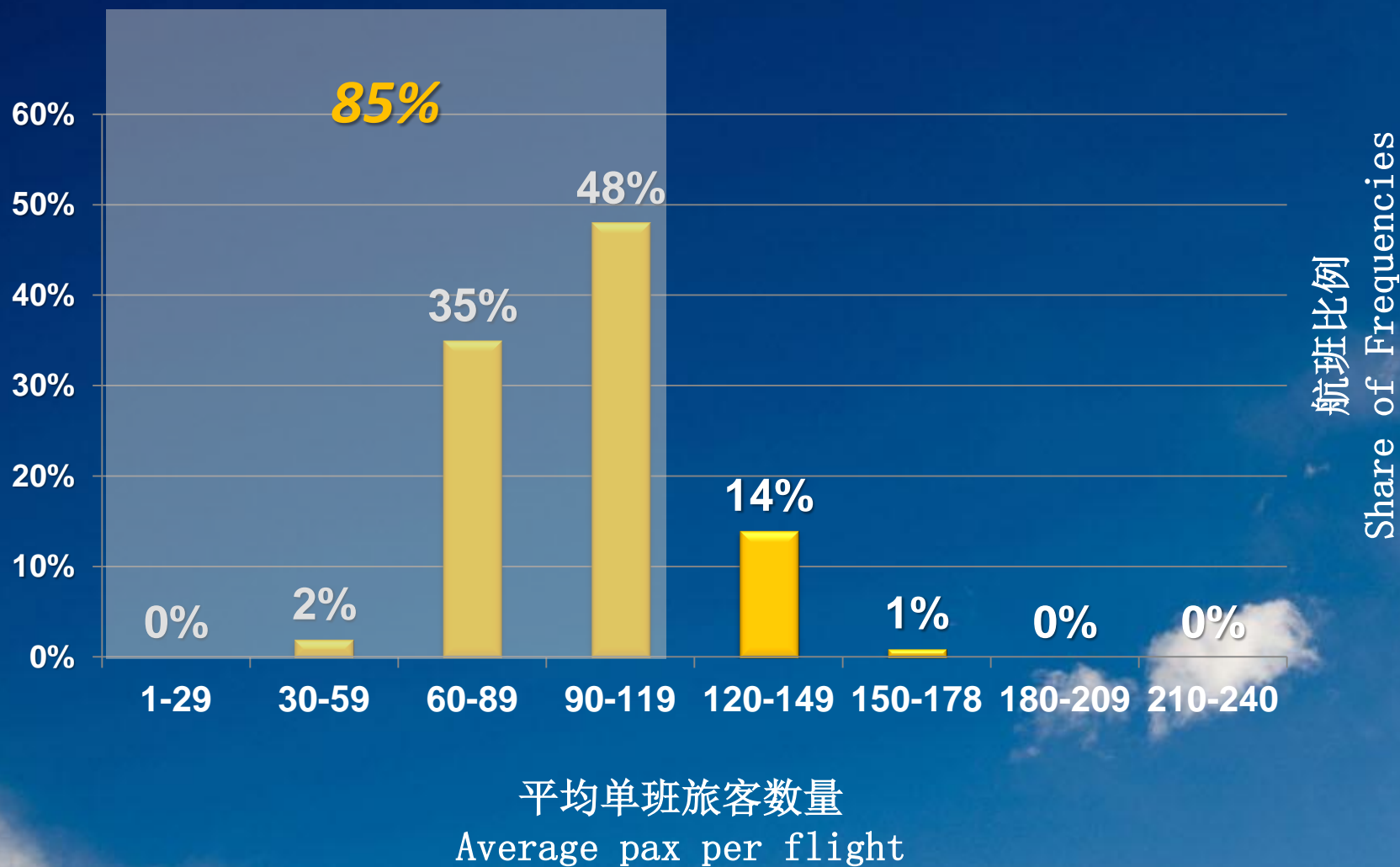
边际利润 vs. 单班需求

Marginal Profit vs. Demand per flight



85%的巴西国内航班乘客不足120

85% flights in Brazilian domestic are less than 120 passengers

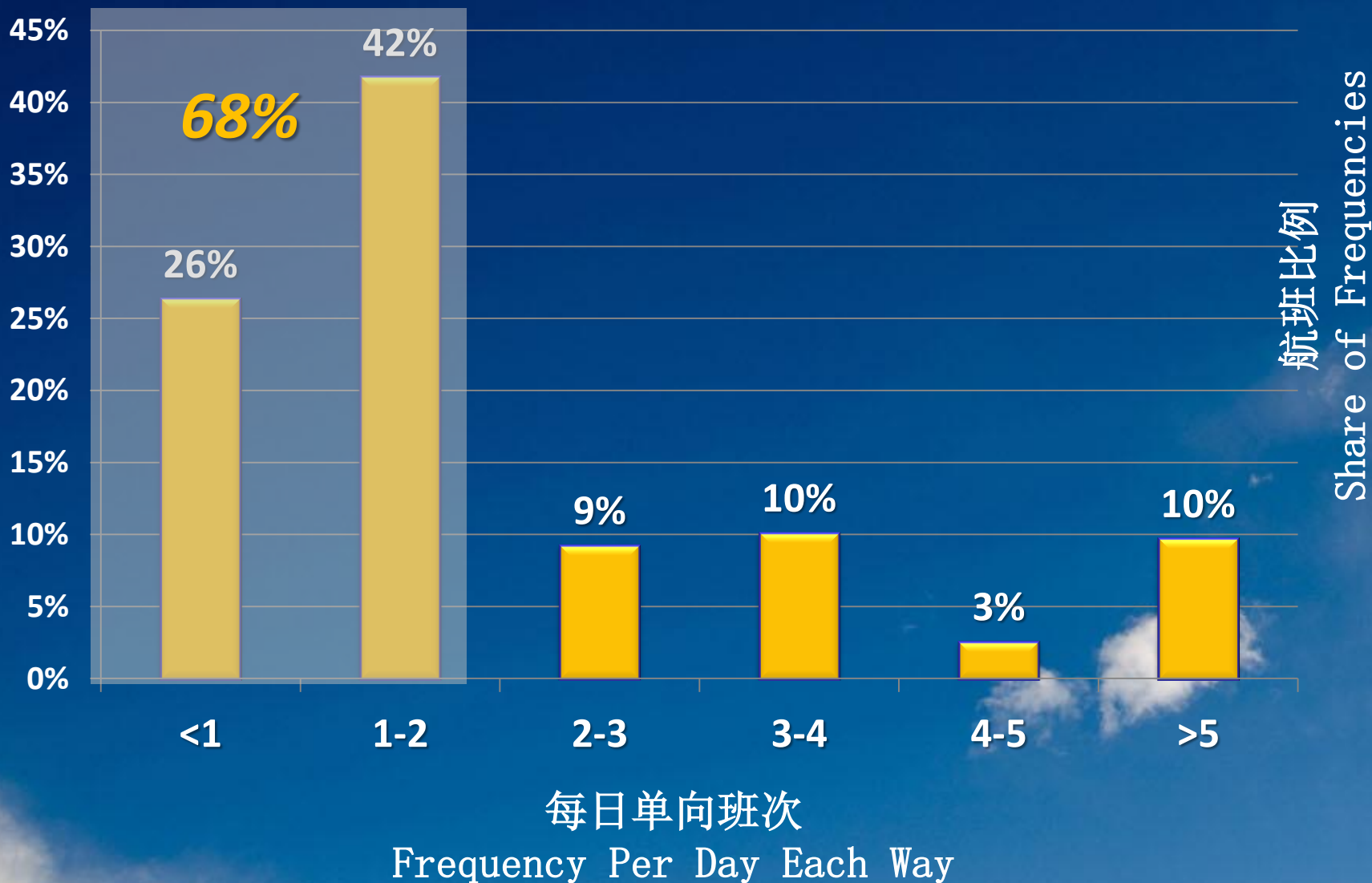


76%的中国航班乘客不足120

76% flights in China carry less than 120 passengers



航班频次不足 Insufficient frequency



务

Azul Success Factor #3: Offer more value to

customers

更舒适的座舱体验：没有中间座位，间距更长，座椅更宽

More comfortable cabin experience: No middle seats, more pitch, wider

乘务提供零食和饮料；空乘训练有素，轻松、活泼

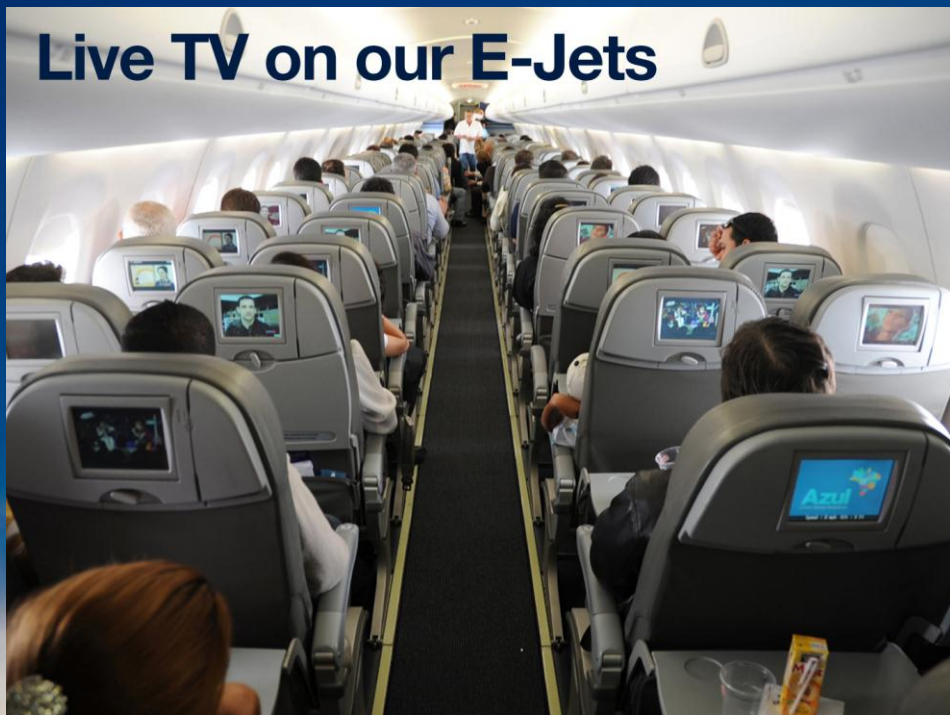
Generous snacks and beverages; empowered, well-trained crews, Informal service style

提供直播电视 Live TV

往来枢纽机场的免费穿梭巴士，远程办理值机

Free shuttle services at major hubs, remote Check-in.

Live TV on our E-Jets



蔚蓝航空的高速运量增长

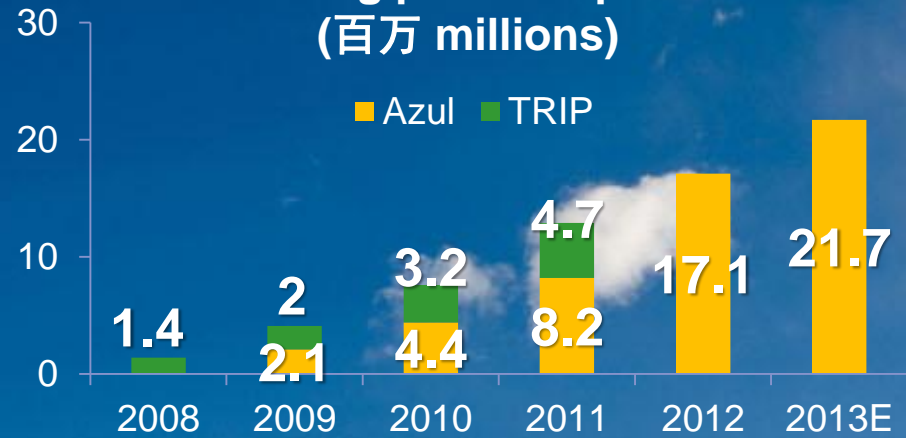
Azul High Traffic Growth



Growing ASKs (十亿 billions)



Growing pax transported (百万 millions)



蔚蓝航空的成就

Achievements of Azul

刺激需求

Demand Stimulated

运输量大增

Rapid traffic growth

增加市场份额

Market share increased

70个城市占主导，42个城市独飞

70 leading cities, sole operator
in 42 cities



蔚蓝经验值得借鉴

The Azul Experience



Blue skies ahead!



Muito obrigada!

E系列飞机助飞低成本航空

E-Jets for LCC Business models





Commercial Aviation

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April 2013

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