



Solution to Support Regional & General Aviation Flying

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ATR
PROPELLING THE NEXT CONNECTION



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Regional & General Aviation Flying**

A STRONG MANUFACTURER

- Established in 1981
- Equal partnership between 2 aerospace leaders

AIRBUS  **LEONARDO**

- \$ 1.8 bn turnover in 2017
- Final assembly line in **Toulouse**
- 1,300 people worldwide

1089
F-WWEB

WORLD WIDE SUCCESS



1500TH ATR DELIVERED !



ATR72-600 with JAC livery

Pilot Crisis : a global issue

- All continents, operators, OEMs

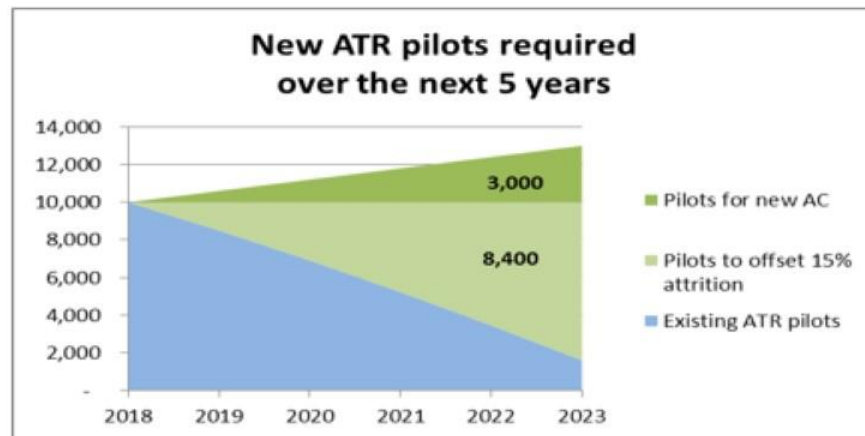
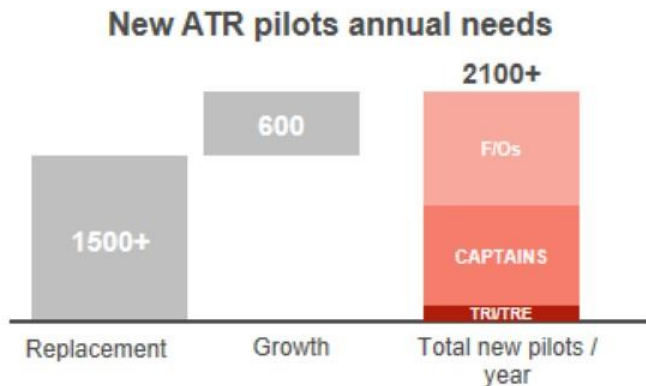
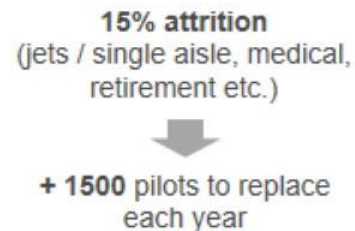
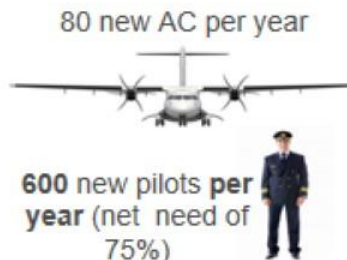
Challenges for Regional operators

- Scarcity of experienced pilots
- High attrition and turnover
- Lack of entry level skills
- Intense Flight Operations

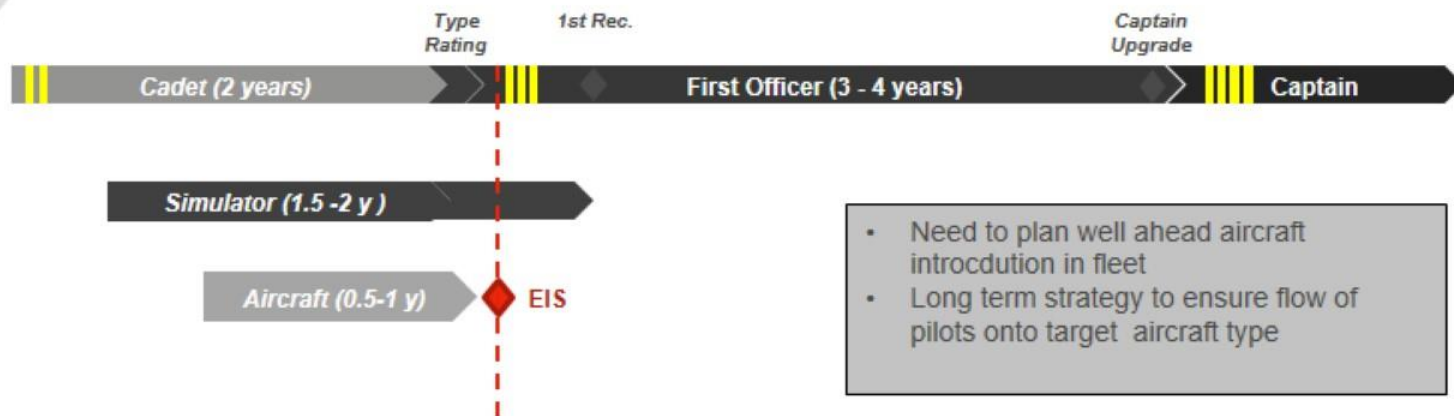


Regional aviation is nurturing pilots for the whole industry,
(as it does for new routes !)

In next 5 years, industry shall produce more ATR pilots than what exists today



Pilot development is a **multi year** journey



- Need to plan well ahead aircraft introduction in fleet
- Long term strategy to ensure flow of pilots onto target aircraft type

- Regional operators are mainly lacking
 - **Captains** & Flight Instructors
 - F/Os with Captain potential
- **Cost of training** remains high 150 k\$ for a full ATPL + type rating
 - Majority of self-sponsored pilot prefer Jet/ Single Aisle carriers (faster payback, prestige)
 - Flag carriers now planning ahead (AF, American, LH, Emirates, Quantas)

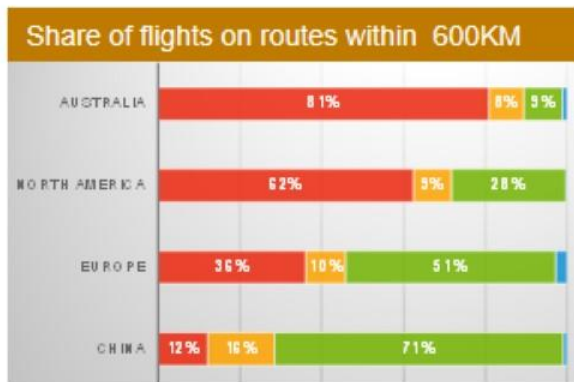
Where will our next ATR pilots come from ?

- **1000+ new ATR First Officers / year**
 - Large majority will be ab-initio pilots fresh out of flying schools.
 - Main carriers now willing to plan ahead, launching cadet programs. ATR operators yet to do the same
 - Risk to see cadet streams further absorbed by jet/single aisle career paths
- **ATR is structuring end-to-end cadet solutions with partners for its operators.**
 - ATR/ENAC “Ready to Fly” program now available with local training options in Europe, Asia and USA.
 - Address **B2C segment and target individual self-sponsored pilots** as well.
 - Funding & financial warranty solutions as key decision factor for candidates
- **Promote ATR flying/training** within flying schools, Universities to attract new generations
 - « ATR for Pilots » communication strategy
 - Institutional partnerships, open-doors events, training material sharing/licensing.
 - Women (3% of aviation pilots) represent a real opportunity for the industry & for regional in particular



ATR

REGIONAL AVIATION CHALLENGES IN CHINA



■ Wide Body
■ Single Aisle
■ 100 seater above
■ Regional 30-99 seater



■ Wide Body
■ Single Aisle
■ 100 seater above
■ Regional 30-99 seater

China Total Fleet number: **3500+**

100 Seater below in China	No.
ARJ21-700	8
CRJ-900	38
MA60	25

A potential for 300+ additional regional aircraft is required in China.

THE 100 SMALLEST AIRPORTS ONLY ACCOUNT FOR 1.5% OF TOTAL



THE 100 SMALLEST AIRPORTS ONLY ACCOUNT FOR 1.5% OF TOTAL

- 100 seater above jet largely used on short routes in China
- Small regional aircraft (90 seater below) only a small percentage in total fleet
- Nearly no connectivity among small cities

GA MARKET--- STRONG GOVERNMENT SUPPORT

中国民用航空局
Civil Aviation Administration of China

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国务院办公厅关于促进通用航空业发展的指导意见

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China to boost development of general aviation industry

(Xinhua)

Updated: 2016-05-17 21:13

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BEIJING - China is set to boost development of its general aviation industry to create a market worth more than one trillion yuan (\$153.8 billion) by 2020.

The country will build new general aviation airports, bringing the total number to more than 500 by 2020. China will also support the opening of low-altitude airspace and promote research and manufacturing in the sector, according to a guideline issued by the State Council, China's

CHINA'S NPC APPROVES 13TH FIVE-YEAR PLAN

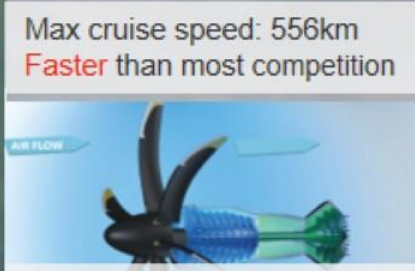


"developing the general aviation industry is conducive to improving the overall transportation system, nurturing new economic growth points, expanding employment and promoting upgrades in the service industry." -China Premier Minister Li Keqiang

According to the National 13th Five-year-plan:

	2015	2020
GA airports:	300	500
GA aircraft:	1874	5000
Annual FH:	732,000	2 million

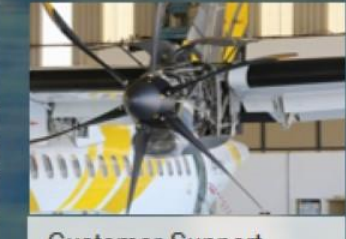
Total Investment in GA sector: **153.8 billion USD**



30名乘客 + 800kg 货物

3.4t Payload, **Highest** compared with competition

ATR42: THE BEST ANSWER TO CHINA'S FAST-GROWING GENERAL AVIATION MARKET



WHY GENERAL AVIATION TRANSPORTATION SERVICE?



Transport passenger to hubs for connection



Increase connections in remote regions and stimulate local economy



Increase activity at under-utilized airports



Provide convenient and affordable air service, No GA airspace limit



Reduce subsidies of local government compared with RJs



Best gateway for pilot training career path

多谢



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