



Outlook of Taoyuan International Airport



桃園國際機場股份有限公司
Taoyuan International Airport Corporation



Ver. Oct-1, 2011



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Brief introduction of Taiwan

- ▶ **Country**
 - ▶ Republic of China (Commonly known as Taiwan)
 - ▶ Capital city : Taipei

- ▶ **Geography**
 - ▶ Location : Pacific Ocean, 120 km (74.6 mi) off the coast of mainland China



- ▶ **Demographics**
 - ▶ Demonym : Taiwanese
 - ▶ Population : 23,061,689 (as of April 2011)
 - ▶ Density : 668/km² (1,730 /mile²)

Economy of Taiwan



- ▶ Ranked as the 19th largest in the world in GDP

Exports	\$274.6 billion (2010)
Export goods	Electronics, flat panels, machinery; metals; textiles, plastics, chemicals; optical, photographic, measuring, and medical instruments (2009)
Main export partners	China 26.64%, Hong Kong 14.46%, US 11.59%, Japan 7.12%, Singapore 4.23% (2009)
Imports	251.4 billion (2010)
Import goods	Electronics, machinery, crude petroleum, precision instruments, organic chemicals, metals (2009)
Main import partners	Japan 20.77%, China 14.01%, US 10.49%, South Korea 6.03%, Saudi Arabia 4.97% (2009)

Economic outlook in Taiwan

► Real GDP Growth

- The external sector is expected to lose some of its vigor while domestic demand is also expected to cool slightly.
- Despite the deceleration of both growth drivers mentioned above, real GDP growth for 2011 is forecast at a solid 4.81%.

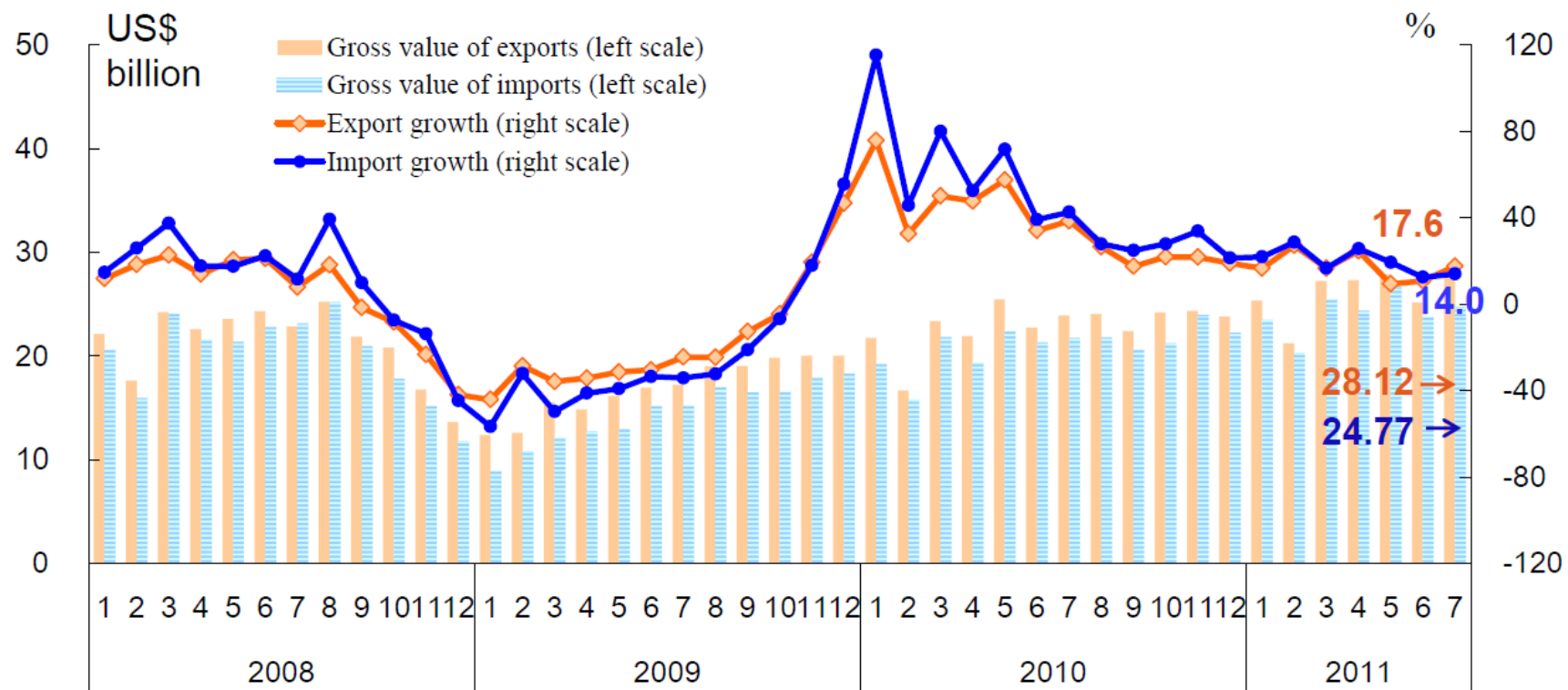


Source: Directorate-General of Budget, Accounting, and Statistics (DGBAS), August 2011

Economic outlook in Taiwan

► Foreign trade

- In July 2011, the foreign trade balance amounted to US\$3.3 billion in Taiwan's favor.

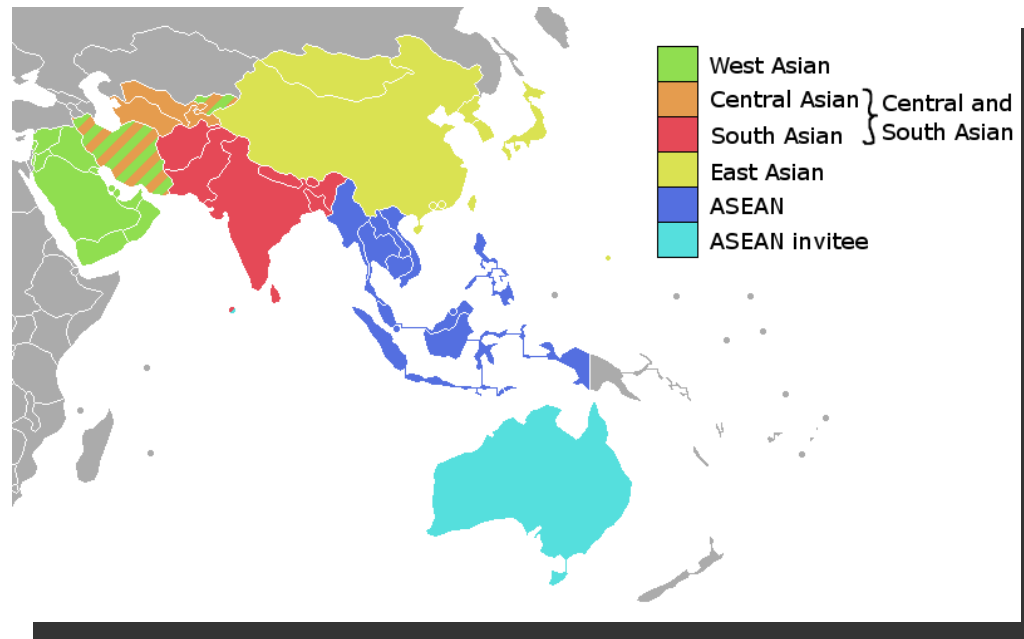


Note: Trade data are adjusted according to the United Nations IMTS Compilers Manual (2004). Total exports include “exports” and “re-exports,” and total imports include “imports” and “re-imports.”

Source: Ministry of Finance.

Economic outlook in Taiwan

- ▶ **Foreign trade-Major trade partners**
 - ▶ China (including Hong Kong) and ASEAN have become increasingly important trade partners to Taiwan since 2000.
 - ▶ Japan has remained Taiwan's largest supplier of imports, despite a narrowing share. Meanwhile, the higher cost of crude oil has increased the share of imports from the Middle East.



Economic outlook in Taiwan



- ▶ Prospects for 2011/2012
 - ▶ **Taiwan's economy shifting to moderate growth**
 - ▶ In the first half of 2011, Taiwan posted a year-on-year real GDP growth rate of 5.58%, higher than Singapore and South Korea but lower than Hong Kong.
 - ▶ **Export growth expected to continue (+6.18% in 2011)**
 - ▶ Cross-strait Economic Cooperation Framework Agreement (ECFA)
 - ▶ Rising demand for electronic and mechanical products in overseas market.



Economic outlook in Taiwan



- ▶ Prospects for 2011/2012
 - ▶ **Private consumption showing significant growth**
 - ▶ Consumer confidence and spending have been boosted.
 - ▶ Improving employment and rising incomes generated by the economic recovery.
 - ▶ Increasing flow of new consumer electronic products coming onto the market.



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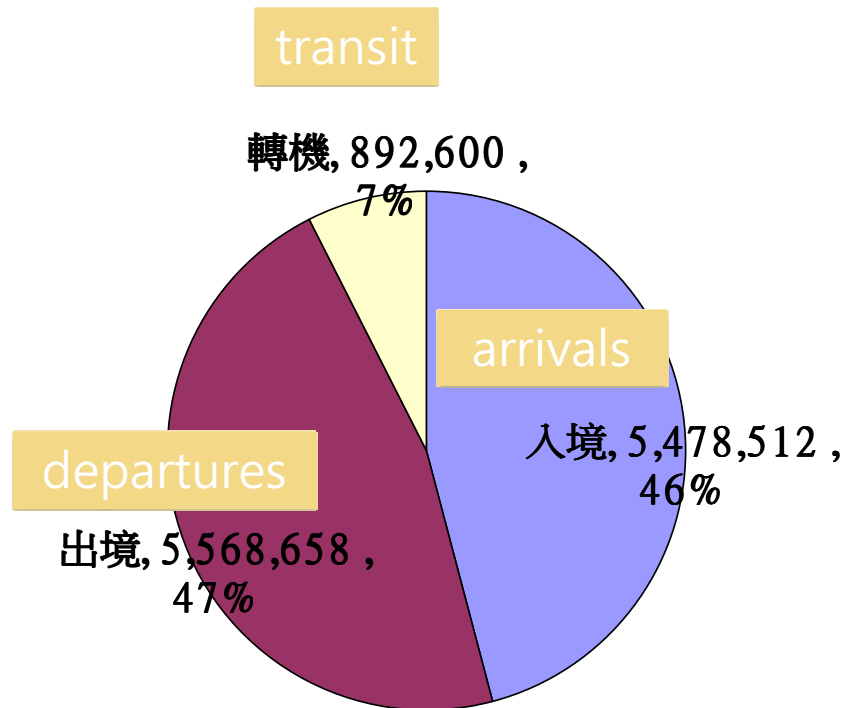
Incentive scheme



Layout of Taoyuan International Airport

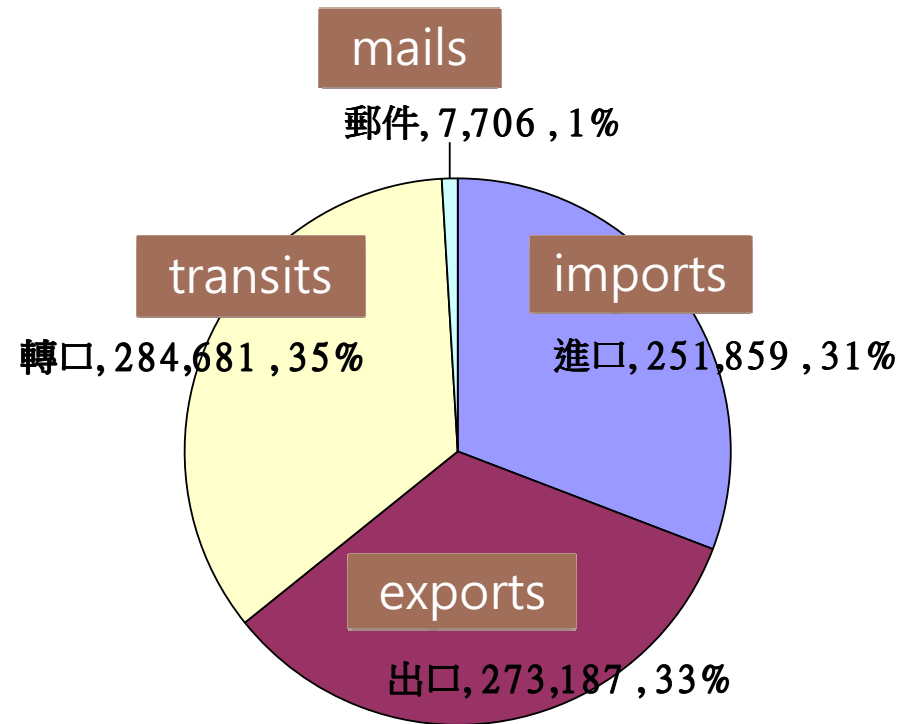


Jan~ Jun, 2011 Passenger analysis



16.56 millions in PAX
(25.11 millions / 2010)

Jan~ Jun, 2011 Cargo analysis

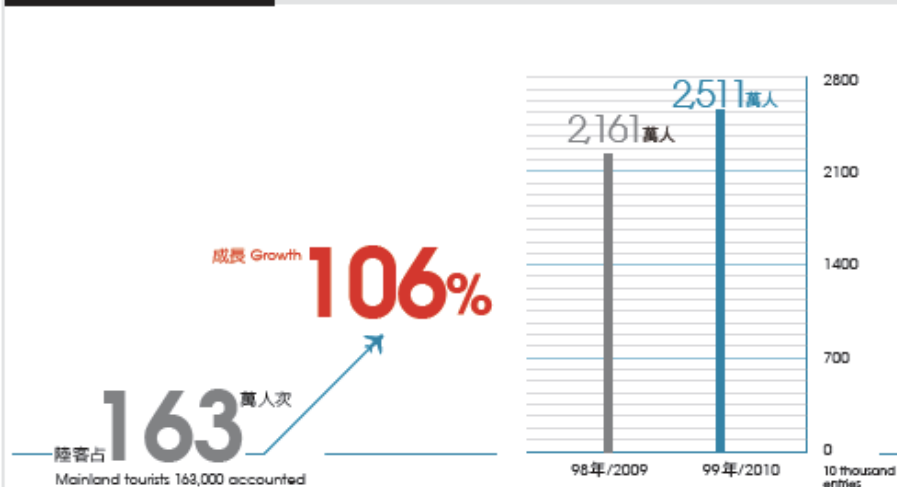


81.7 thousand in Cargo (tons)
(176.7 thousand / 2010)

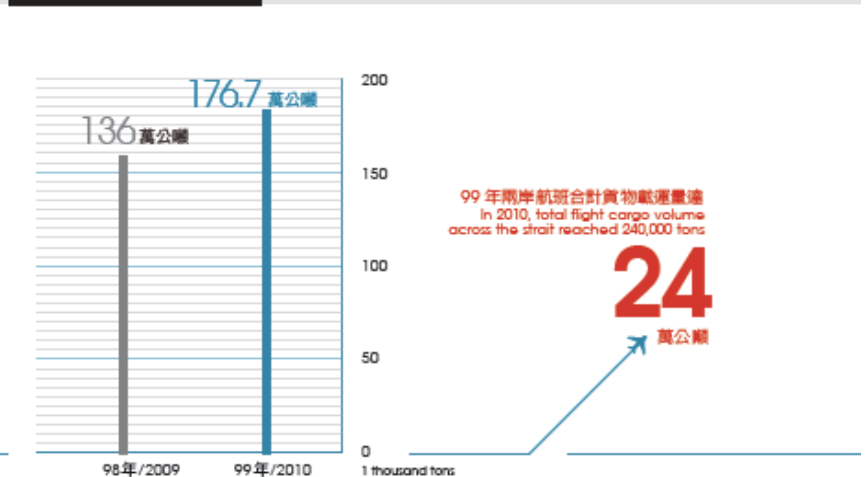
Magnificent Growth in PAX & CARGO 2011

- ▶ Direct cross-strait flights and tourism lead to record passenger volume.
- ▶ Cross-strait demand boosts air cargo hub formation.

客運分析 / Passenger Analysis

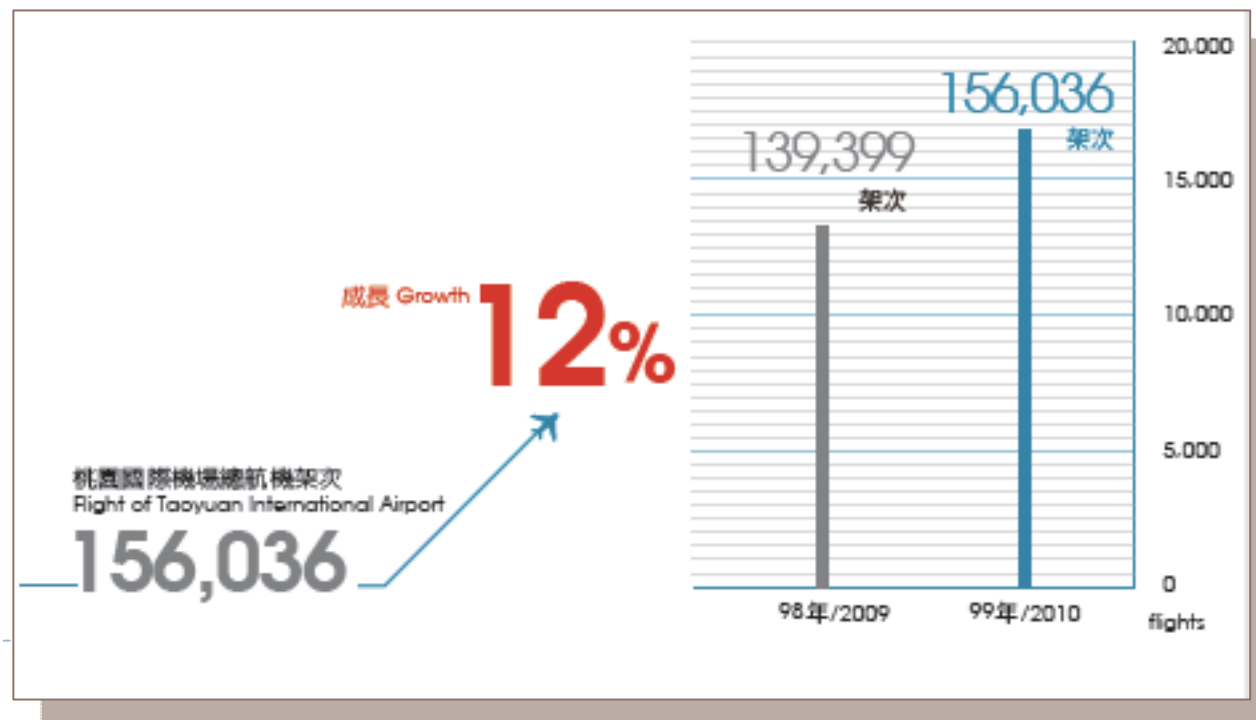


貨運量分析 / Cargo Analysis



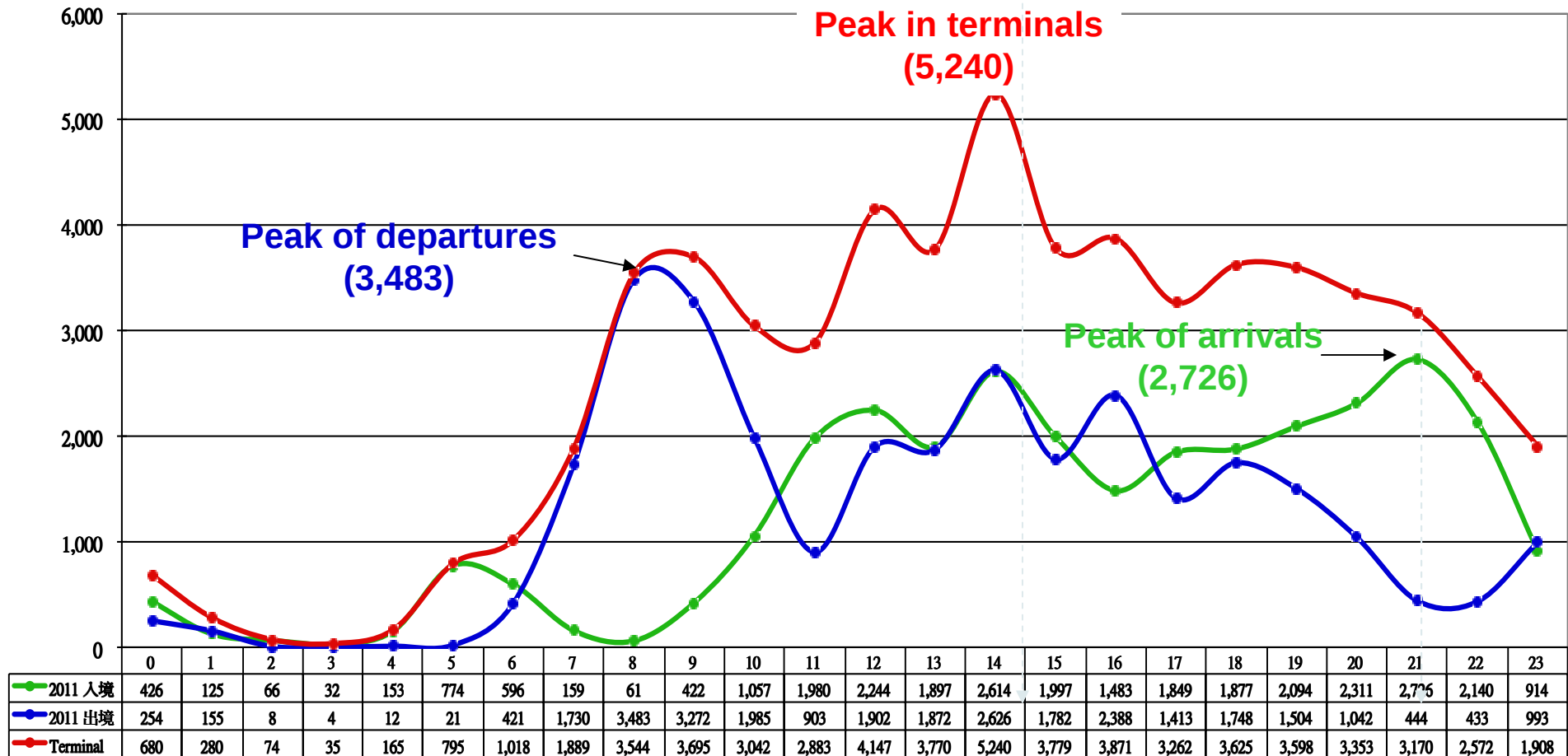
Demand Leads to Increased Flight Volume

- ▶ Cross-Taiwan Strait flights and the government promoting tourism in 2010 lead to a major increase in the number of destination in mainland China and around the world.
- ▶ The number of tourists visiting the island increased significantly. There were also cross-strait medical charters, non-profit business charters, and other services, resulting in higher passenger and cargo volume.



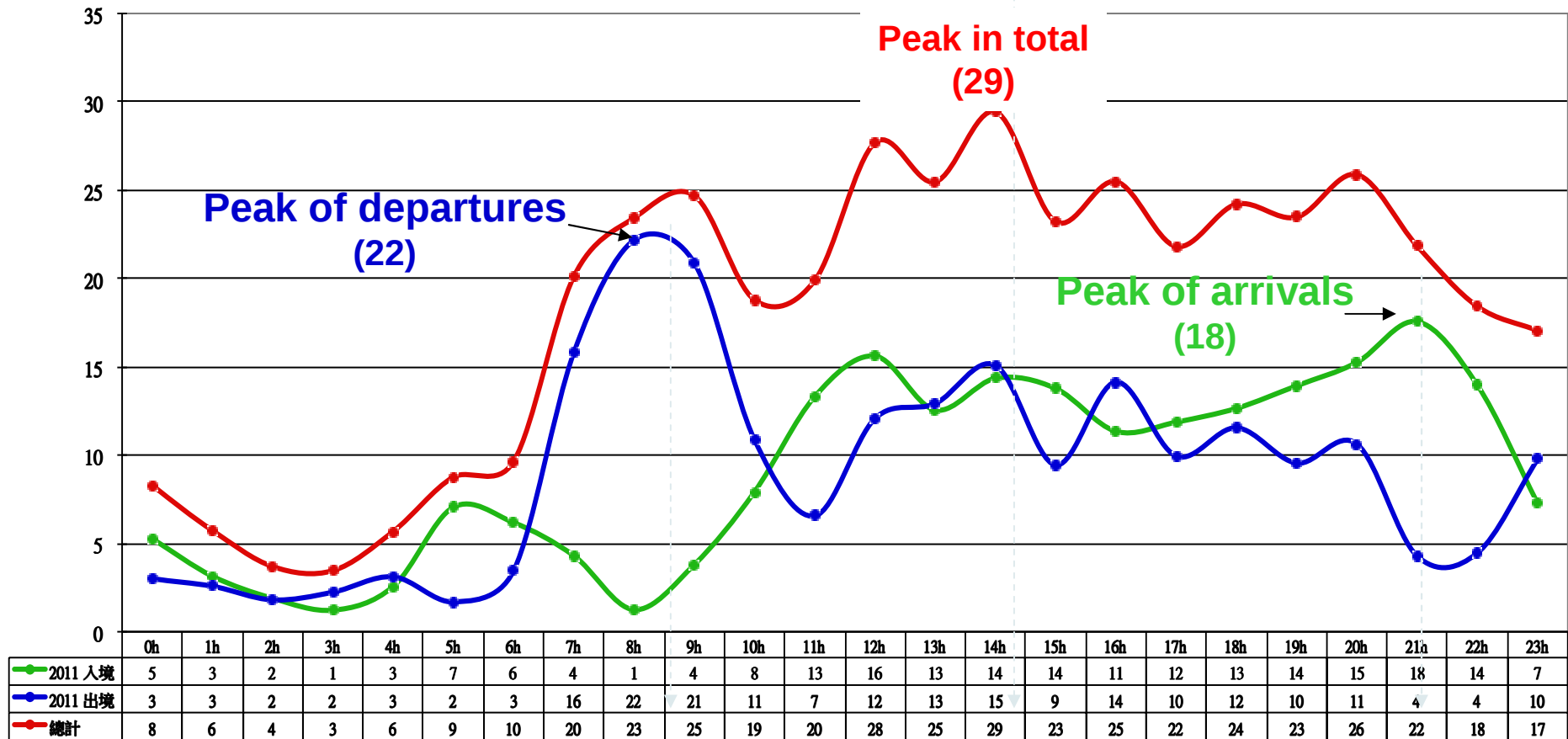
Average PAX per hour Jan~ Jun, 2011

Pax



Average Flights per hour Jan~ Jun, 2011

Flights



Daily movements : 450 flights

Aircraft Maintenance Services

- ▶ China Airlines Engineering and Maintenance Organization (CALEMO) and Evergreen Aviation Technologies (EGAC) both offers maintenance services at the airport.
- ▶ With its huge base, CALEMO, with a market share of over 75%, can offer maintenance service of 5 huge airliners.





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Air Route network



34 個大陸城市
mainland cities



大陸城市：上海浦東 Shanghai Pudong、貴陽 Guiyang、寧波 Ningbo、南京 Nanjing、長沙 Changsha、海口 Haikou、桂林 Guilin、鄭州 Zhengzhou、杭州 Hangchow、福州 Fuzhou、武漢 Wuhan、西安 Xi'an、昆明 Kunming、大連 Dalian、青島 Qingdao、瀋陽 Shenyang、成都 Chengdu、廈門 Xiamen、重慶 Chongqing、深圳 Shenzhen、北京 Beijing、廣州 Guangzhou、合肥 Hefei、天津 Tianjin、濟南 Jinan、哈爾濱 Harbin、南昌 Nanchang、太原 Taiyuan、煙臺 Yantai、南寧 Nanning、長春 Changchun、石家莊 Shijiazhuang、蕪安 Wu'an、米子市 Mizishi

縱橫寰宇，全球航線交織臺灣天空

Unhindered Flying — Global Air Routes Spread Across Taiwan

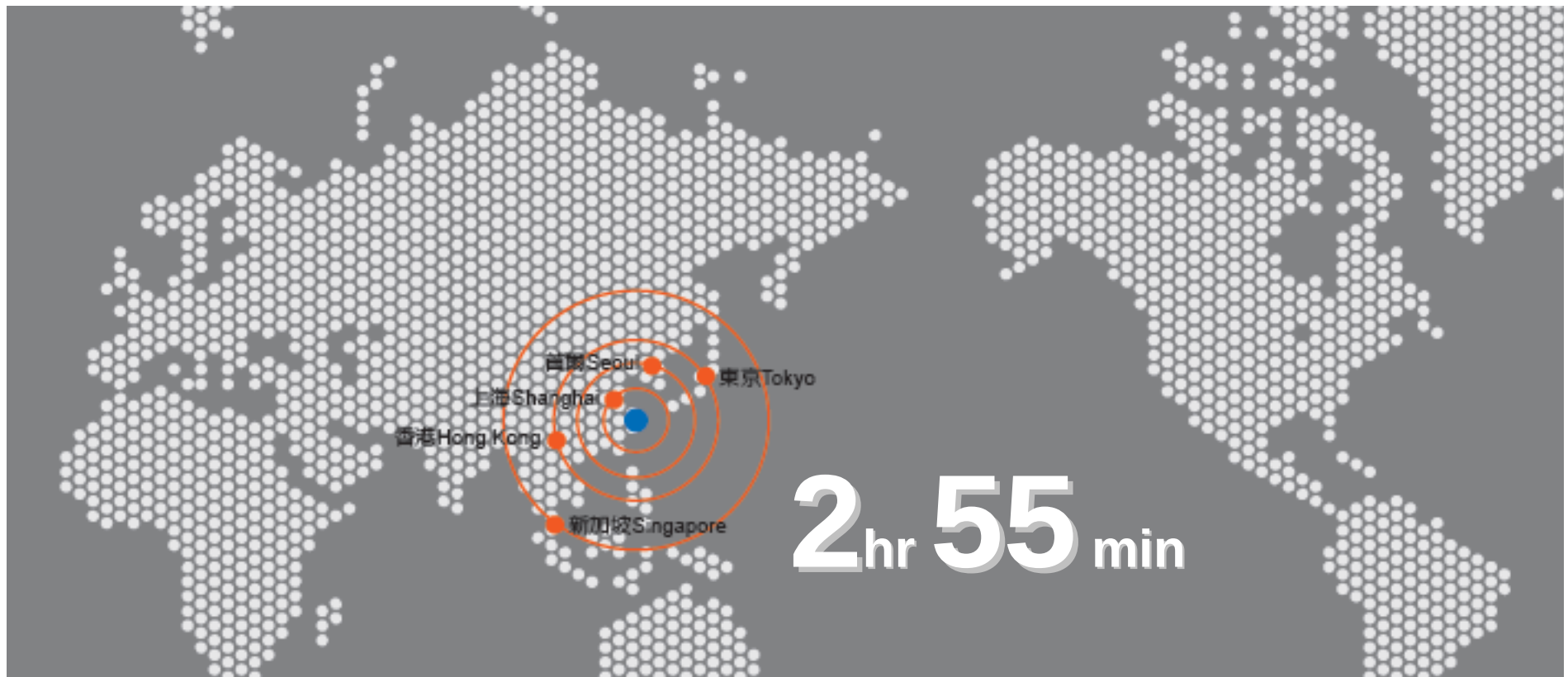


80 個國際航點
International destinations

51 家航空公司
Airlines

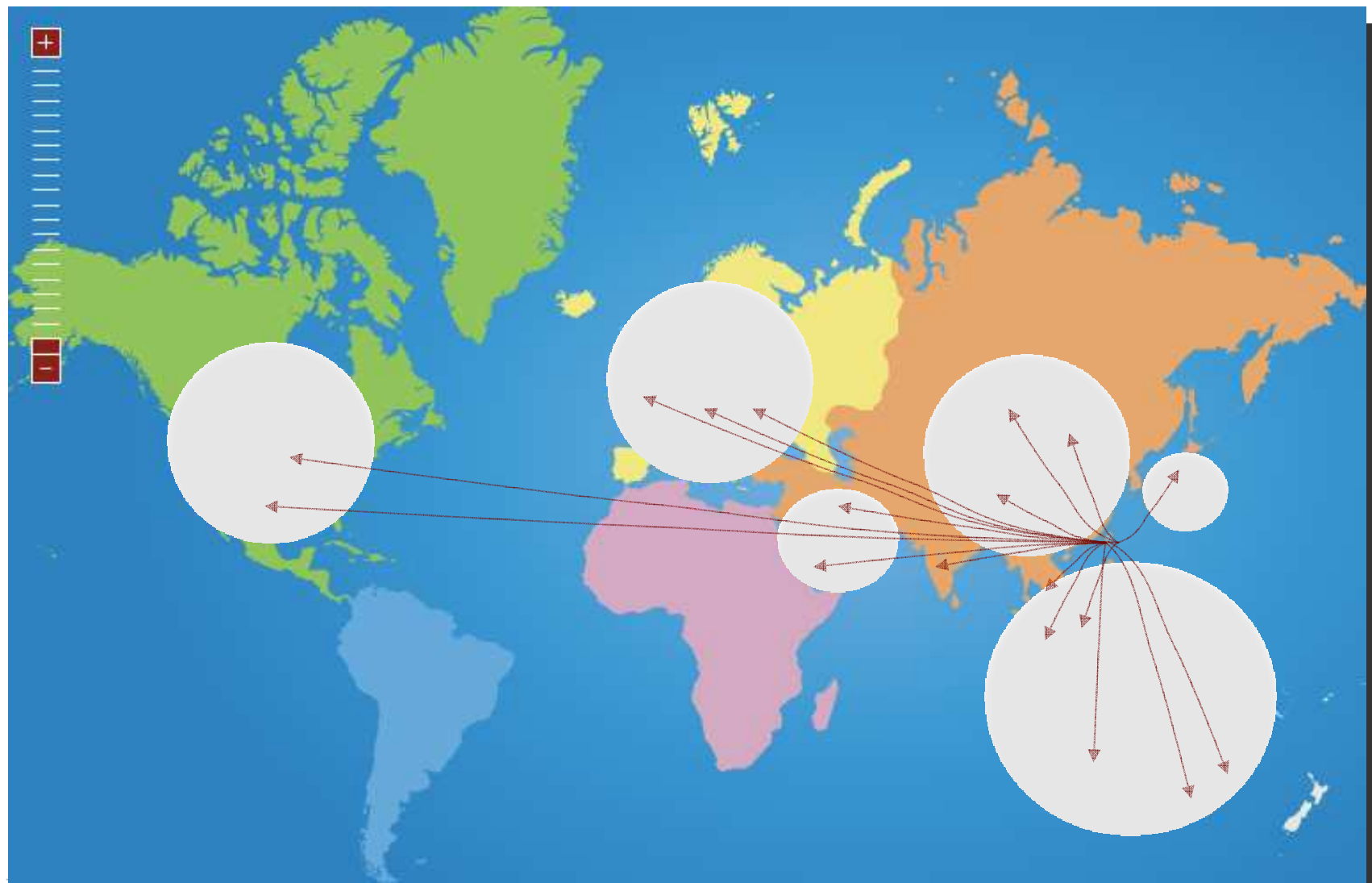


Average flying time to 5 largest cities in Asia



TOKYO SINGAPORE SEOUL SHANGHAI HONGKONG

Prospective Route Area in Future





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Incentive program

- ▶ According to Article 15 of
" Taiwan Taoyuan International Airport Rates and
Fee-charging Standards for the Use of Airfield Assets
and related Facilities" ,

"Taoyuan International airport corporation Ltd. may set
50% discount or 50% premium upon the Rates and
Fees based on specific conditions."

* Any incentive programs will be subject to specific conditions
with different airlines. Please arrange further discussion with us.



Appendix 1: Air Routes Analysis connecting to Taoyuan International Airport



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Airlines and destinations (1/3)



Airlines	Destinations
Air Busan	Busan
Air China	Beijing-Capital, Chengdu, Chongqing, Hangzhou, Shanghai-Pudong, Tianjin
Air Macau	Macau
AirAsia	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, Kuala Lumpur, London-Heathrow, Macau [begins 11 December], Manila, Penang, Phnom Penh, Phuket, Rome-Fiumicino, Seoul-Incheon, Singapore, Surabaya, Vienna, Yangon, Charter: Koror
China Airlines	Auckland, Beijing-Capital, Brisbane, Chengdu, Fukuoka, Guam, Guangzhou, Haikou [begins 31 October], Hiroshima, Honolulu, Los Angeles, Miyazaki, Nagoya-Centrair, Naha, New York-JFK, Osaka-Kansai, Qingdao, San Francisco, Sanya, Sapporo-Chitose, Shanghai-Pudong, Shenzhen, Sydney, Tokyo-Narita, Vancouver, Wuhan, Xi'an
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

Airlines and destinations (2/3)



Airlines	Destinations
EVA Air	Amsterdam, Bangkok-Suvarnabhumi, Beijing-Capital, Brisbane, Chengdu, Denpasar/Bali, Fukuoka, Guam, Guangzhou, Hangzhou, Hanoi, Ho Chi Minh City, Hong Kong, Jakarta-Soekarno-Hatta, Jinan, Komatsu, Kuala Lumpur, London-Heathrow, Los Angeles, Macau, Manila, Nagoya-Centrair, New York-JFK [resumes 31 October], Newark [ends 29 October], Osaka-Kansai, Paris-Charles de Gaulle, Phnom Penh, San Francisco, Sapporo-Chitose, Seattle/Tacoma, Sendai [resumes 31 October], Seoul-Incheon, Shanghai-Pudong, Singapore, Surabaya, Tianjin, Tokyo-Narita, Toronto-Pearson, Vancouver, Vienna, Zhengzhou
EVA Air operated by Uni Air	Macau
Fly Guam operated by Sky King, Inc.	Koror
Hainan Airlines	Beijing-Capital, Dalian, Guangzhou, Haikou, Xi'an
Hong Kong Airlines	Hong Kong
Japan Airlines	Nagoya-Centrair, Osaka-Kansai, Tokyo-Narita
Jetstar Asia Airways	Osaka-Kansai, Singapore
KLM	Amsterdam, Bangkok-Suvarnabhumi
Korean Air	Seoul-Incheon
Malaysia Airlines	Kota Kinabalu, Kuala Lumpur, Los Angeles

Airlines and destinations (3/3)



Airlines	Destinations
Mandarin Airlines	Kalibo
Mandarin Airlines	Changsha, Nanjing, Ningbo, Shenyang, Xiamen, Yancheng, Zhengzhou
Philippine Airlines	Manila
Shandong Airlines	Jinan, Qingdao, Yantai
Shanghai Airlines	Nanjing, Xuzhou
Shenzhen Airlines	Shenyang, Shenzhen, Wuxi, Zhengzhou
Sichuan Airlines	Kunming
Singapore Airlines	Singapore
Spirit of Manila Airlines	Clark
Tiger Airways	Singapore
Thai Airways International	Bangkok-Suvarnabhumi, Seoul-Incheon
TransAsia Airways	Busan, Changsha, Chiang Mai, Macau, Singapore, Shanghai-Pudong, Phuket, Xuzhou [begins 1 November] Charter : Hakodate, Kushiro, Koror
TonleSap Airlines	Siem Reap
Uni Air	Chongqing, Dalian, Fuzhou, Nanjing, Ningbo, Qingdao, Shenzhen
United Airlines	Tokyo-Narita
Vietnam Airlines	Hanoi, Ho Chi Minh City, Charter: Da Nang Seasonal: Can Tho
Xiamen Airlines	Changsha, Fuzhou, Hangzhou, 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
	Abu Dhabi, Amsterdam, Anchorage, Atlanta, Bangkok-Suvarnabhumi, Chicago-O'Hare, Dallas/Fort Worth, Delhi, Frankfurt, Fuzhou, Guangzhou, Hanoi, Hong Kong, Ho Chi Minh City, Houston-Intercontinental, Jakarta-Soekarno-Hatta, Kalibo, Kaohsiung, Kuala Lumpur, Los Angeles, Luxembourg, Manchester, Manila, Miami, Milan-Malpensa, Nanjing, New York-JFK, Osaka-Kansai, Penang, Prague, San Francisco, Seattle/Tacoma, Shanghai-Pudong, Singapore, Tokyo-Narita, Xiamen
China Airlines Cargo	
DHL Aviation operated by Air Hong Kong	Hong Kong
Emirates SkyCargo	Dubai
	Anchorage, Atlanta, Bangkok-Suvarnabhumi, Brussels, Chicago O'Hare, Dallas/Fort Worth, Delhi, Frankfurt, Guangzhou, Hanoi, Hong Kong, Houston-Intercontinental, Jakarta, London-Heathrow, Los Angeles, Macau, Manila, New York JFK, Osaka-Kansai, Penang, Seattle/Tacoma, Singapore, Vienna[25][26]
EVA Air Cargo	
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
Trai Thien Air Cargo	Hanoi
TransGlobal Airways	Clark
UPS Airlines	Anchorage, Clark, Cologne/Bonn, Dubai, Seoul-Incheon



Appendix 2: Taiwan Taoyuan International Airport Table of Rates and Fee-charging Standards for the Use of Airfield Assets and related Facilities



桃園國際機場股份有限公司

Taoyuan International Airport Corporation

