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The State of the Aviation Industry

Webinar



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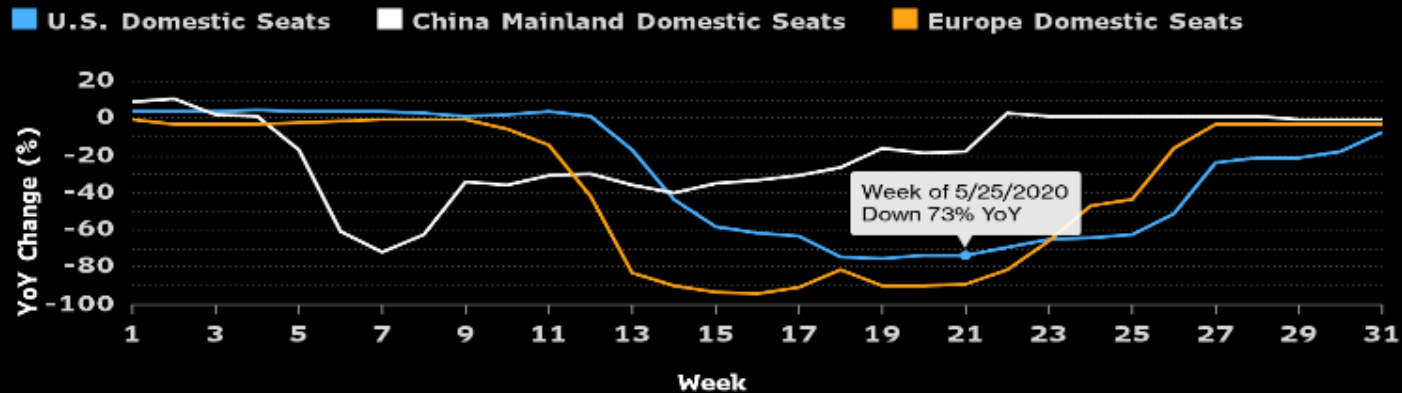


**Bloomberg
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Agenda

Welcome
The Current Impact
The Return
The New Norm
In the News
Questions

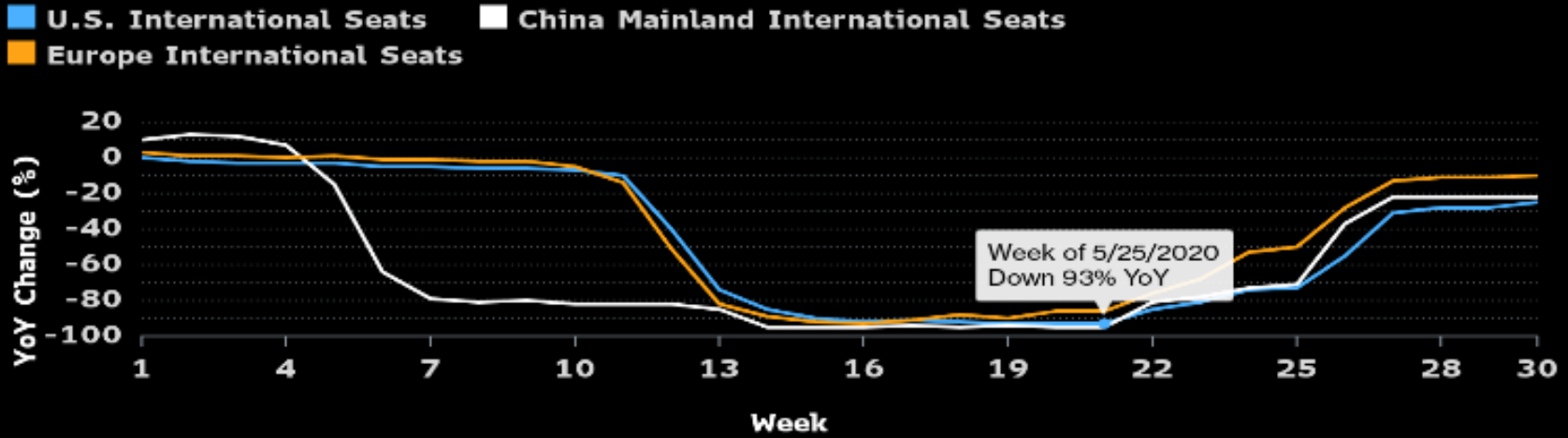
China Still Leads the Way, Load Factors Low



Capacity is measured in seats. Week 1 starts on Monday January 6th, 2020 and is compared to the week starting on Monday January 7th, 2019. Europe is defined as countries part of ECAA and similar. Diio data as of May 26, 2020 (corrected for easyJet most recent schedule on weeks 20 and 21)

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International Weaker on Restrictions



Capacity is measured in seats. Week 1 starts on Monday January 6th, 2020 and is compared to the week starting on Monday January 7th, 2019. Europe is defined as countries part of ECAA and similar. Only flights from/to each markets are considered. Diio data as of May 26, 2020.



Parked Fleet

Narrow-body Parked Fleet



Cirium data as of May 26, 2020
Only narrow-body and regional aircraft are considered. Data as of the last day of the month available.



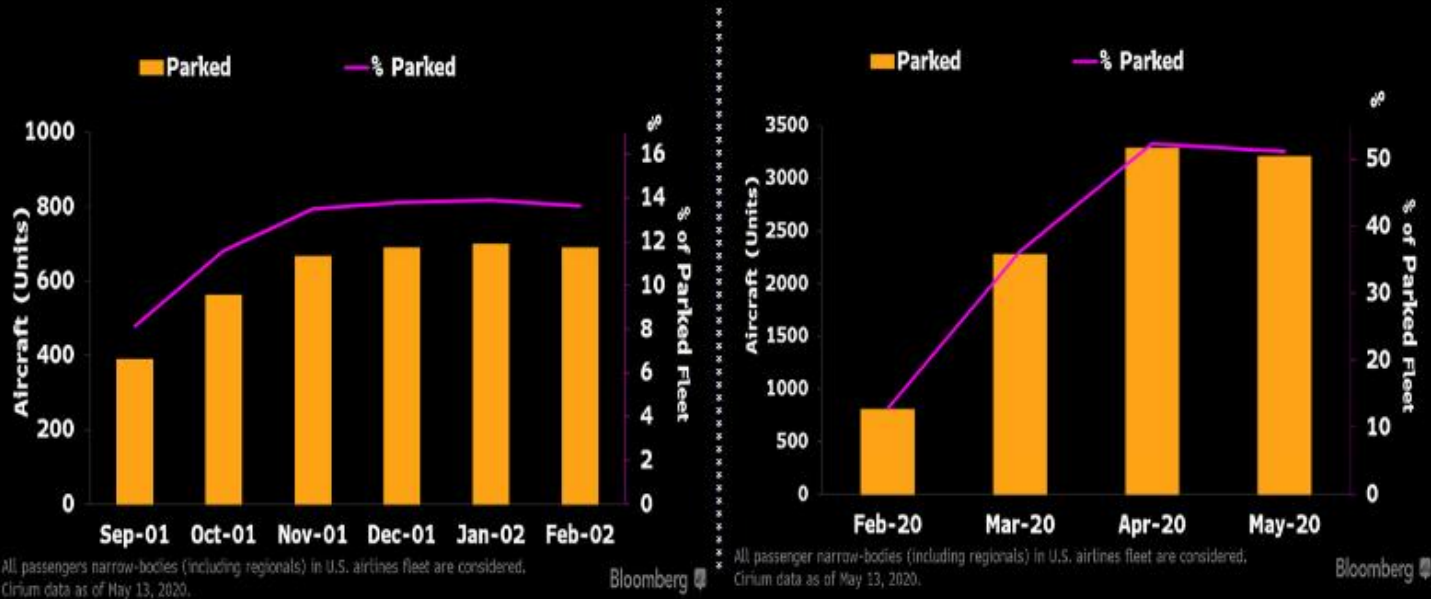
Wide-body Parked Fleet



Cirium data as of May 26, 2020
Only commercial passenger wide-body aircraft are considered. Data are as of the last available day of the month.



Current Environment Much Worse than 9/11



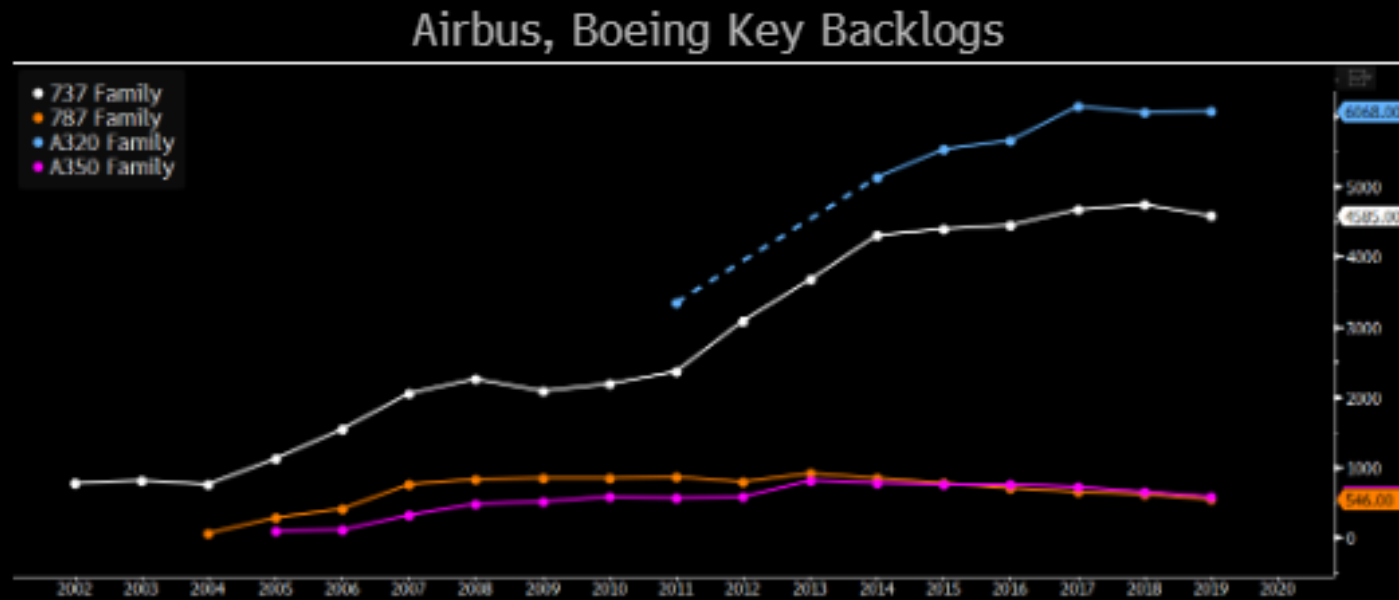
Recovery 2025?



U.S. Bureau of Transportation, Bloomberg Intelligence
Compiled data by BTS from 74 U.S. carriers as of April 6, 2020.

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Where is the backlog going?



Source: Bloomberg Intelligence

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Questions



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