

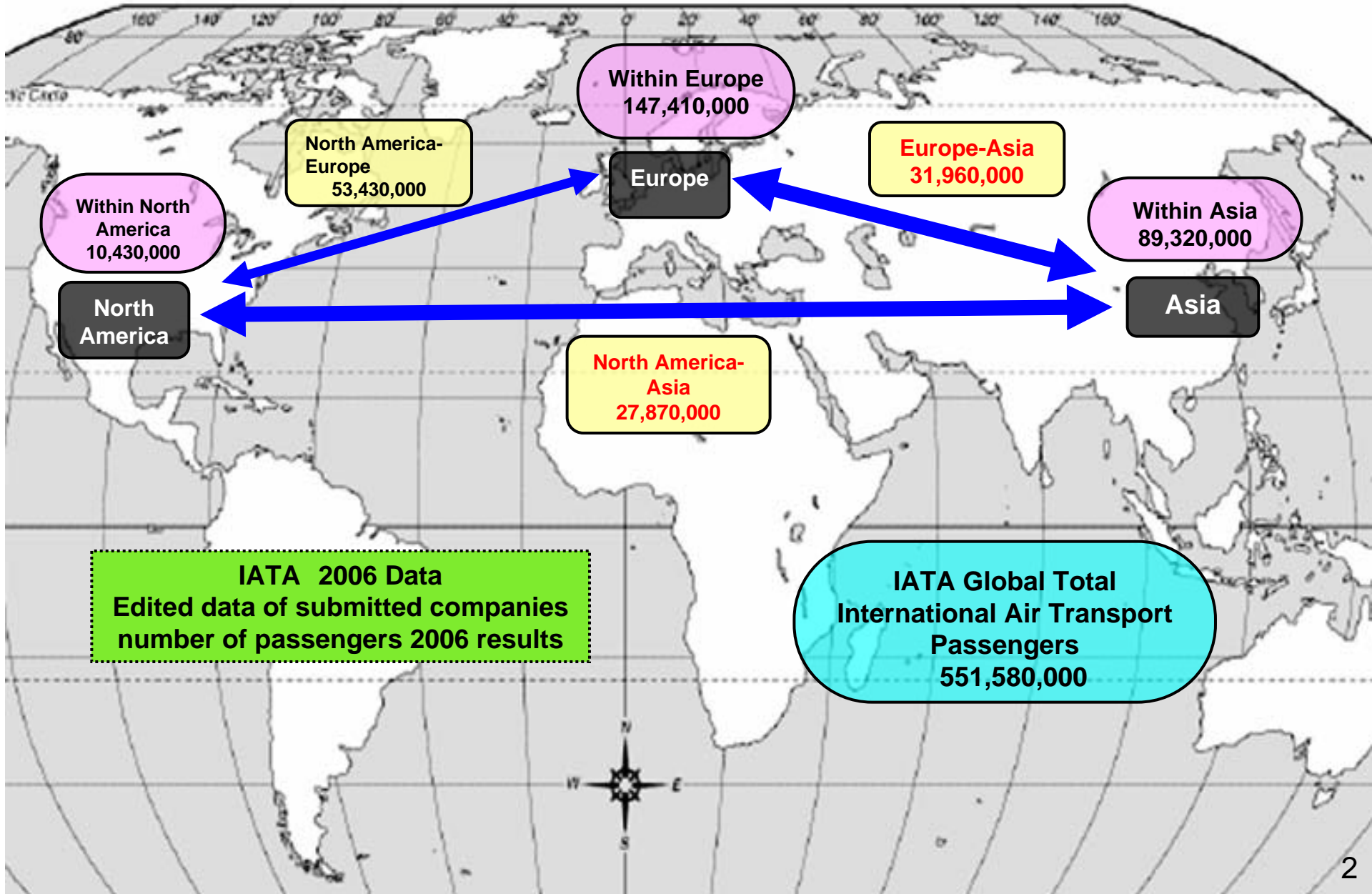
The Growing Asia and ANA

—The Role of ANA in Asia—

May 7, 2008

Hayao Hora All Nippon Airways Co., Ltd.





Within North America
10,430,000

North America

North America-Europe
53,430,000

Within Europe
147,410,000

Europe

Europe-Asia
31,960,000

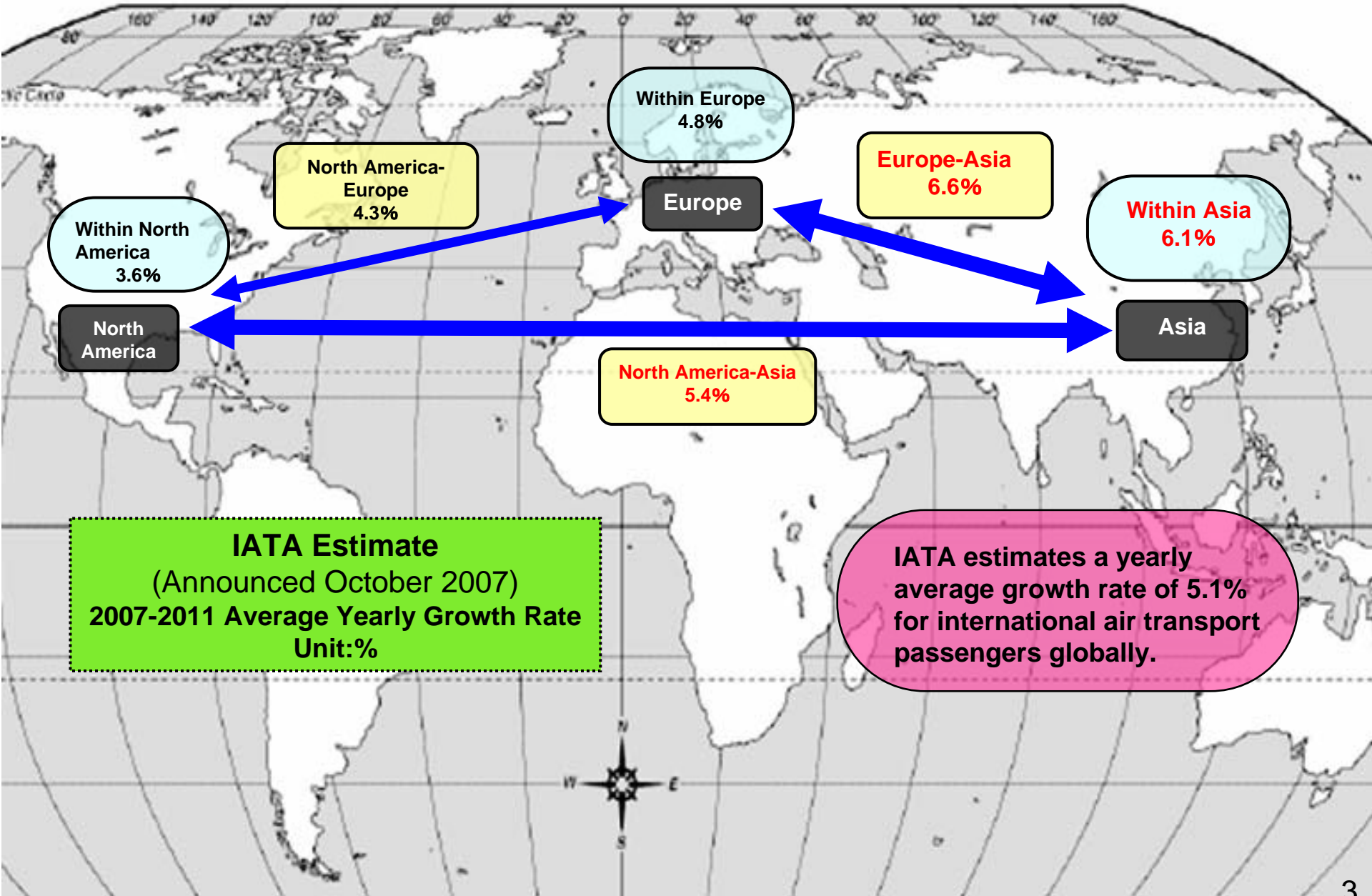
Within Asia
89,320,000

Asia

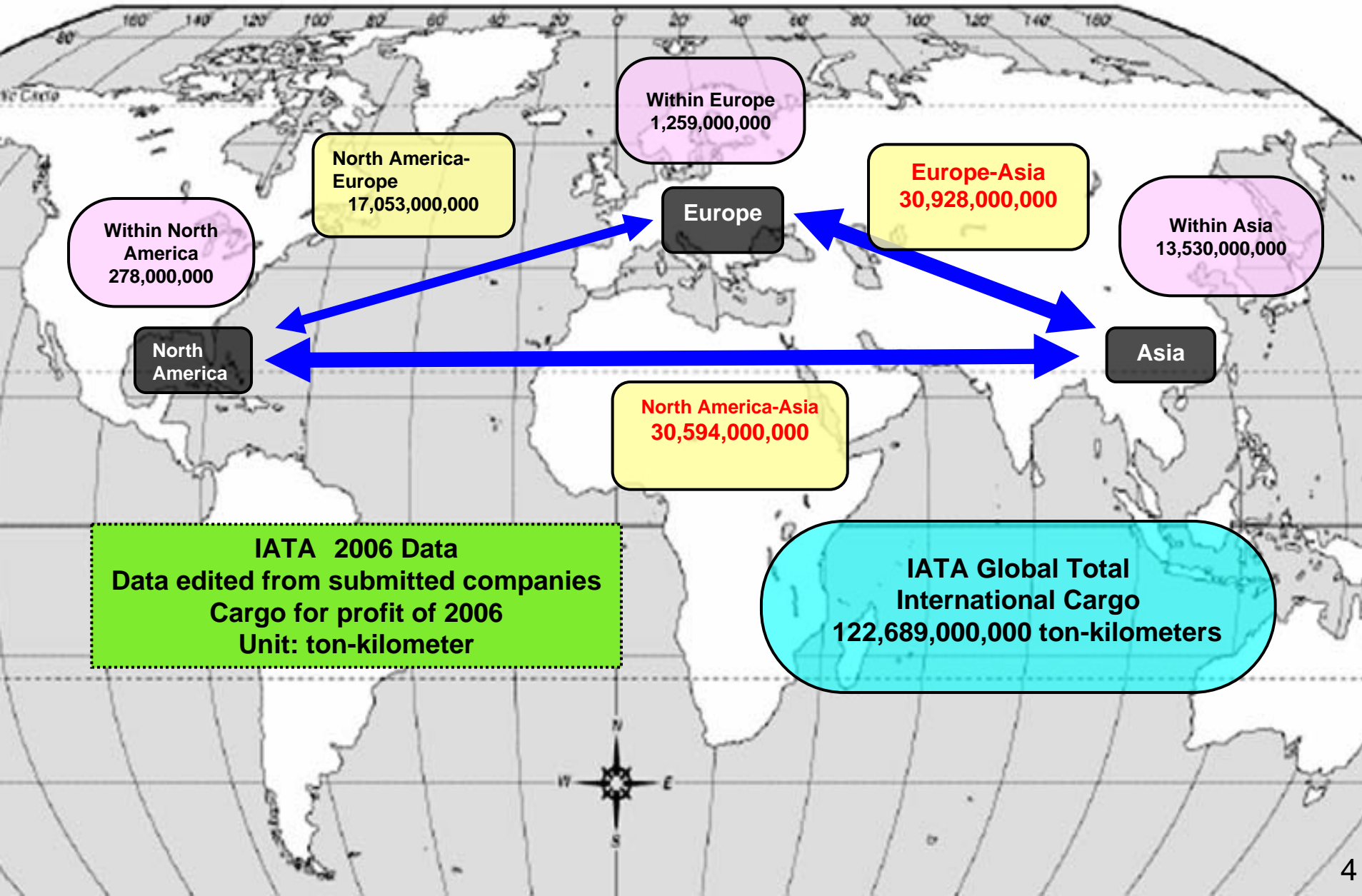
North America-Asia
27,870,000

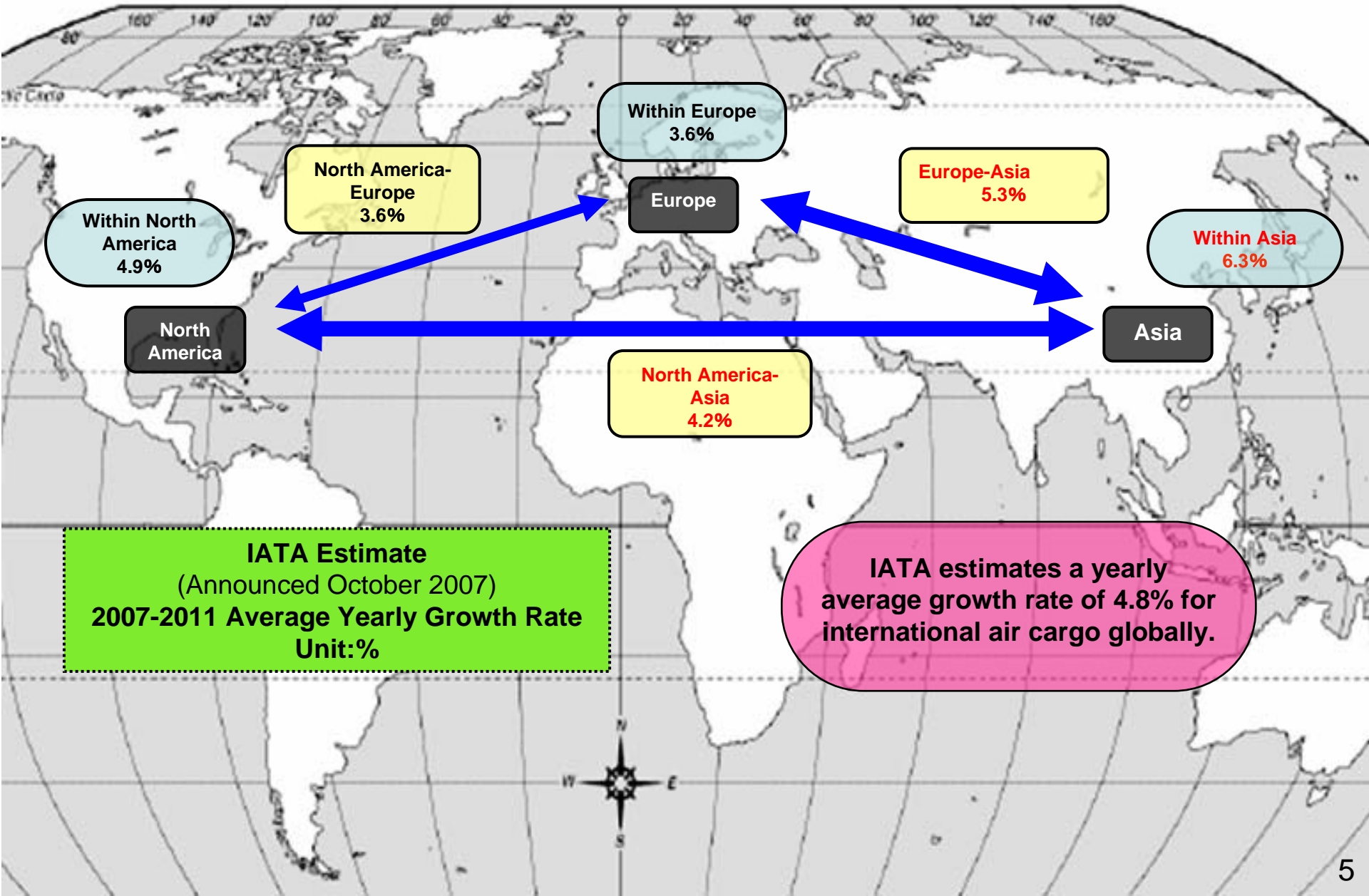
IATA 2006 Data
Edited data of submitted companies
number of passengers 2006 results

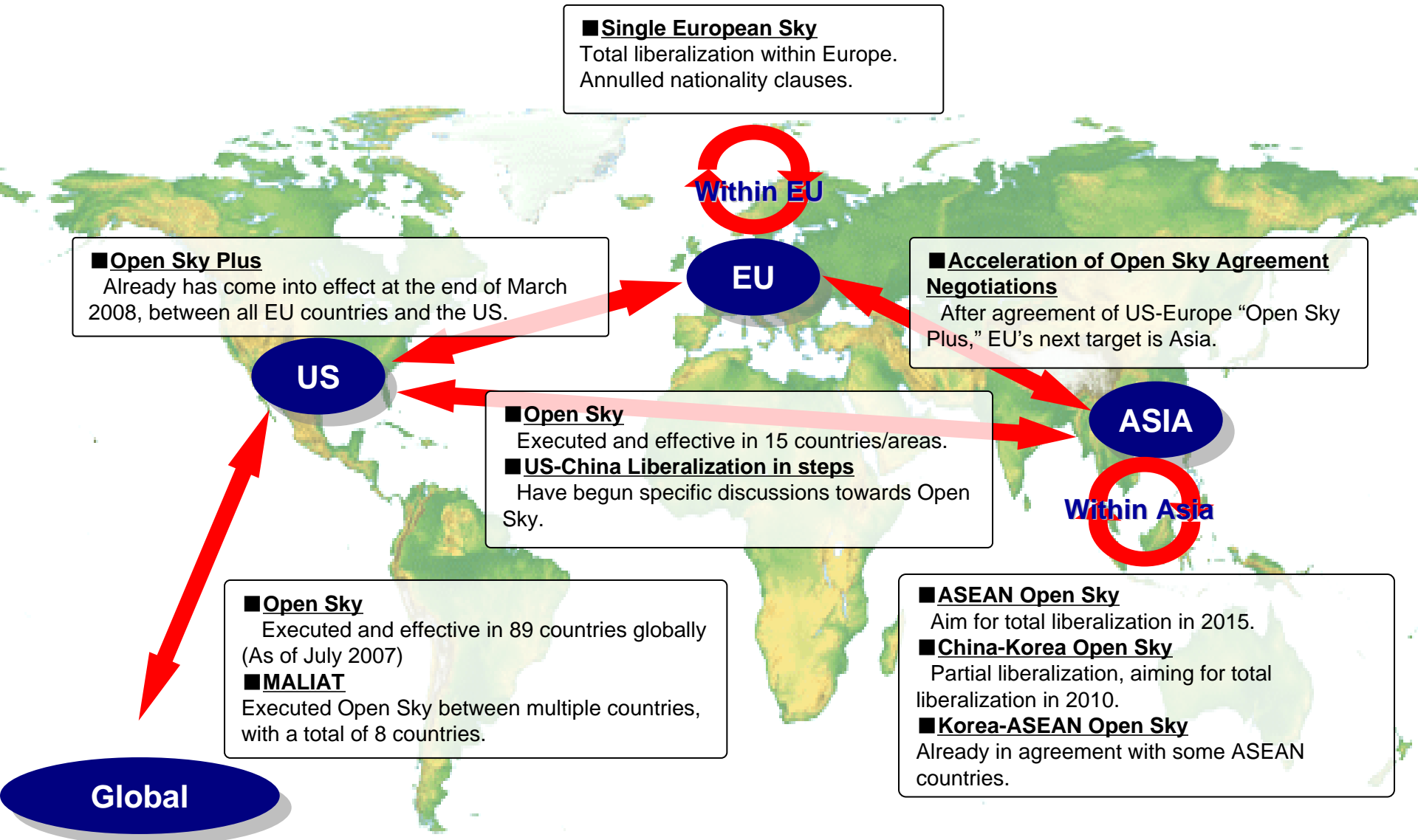
IATA Global Total
International Air Transport
Passengers
551,580,000



International Air Cargo, Results







■ **Single European Sky**
Total liberalization within Europe.
Annulled nationality clauses.



EU

■ **Open Sky Plus**
Already has come into effect at the end of March 2008, between all EU countries and the US.

■ **Acceleration of Open Sky Agreement Negotiations**
After agreement of US-Europe "Open Sky Plus," EU's next target is Asia.

US

■ **Open Sky**
Executed and effective in 15 countries/areas.
■ **US-China Liberalization in steps**
Have begun specific discussions towards Open Sky.

ASIA



■ **Open Sky**
Executed and effective in 89 countries globally (As of July 2007)
■ **MALIAT**
Executed Open Sky between multiple countries, with a total of 8 countries.

■ **ASEAN Open Sky**
Aim for total liberalization in 2015.
■ **China-Korea Open Sky**
Partial liberalization, aiming for total liberalization in 2010.
■ **Korea-ASEAN Open Sky**
Already in agreement with some ASEAN countries.

Global



Asian Gateway Initiative

Aiming to make Japan a bridge for the flow of people, things, funds, culture and information, in order to bring in growth and activity from overseas, especially Asia.

<Building a Strategic International Air Transport Network by Liberalization of Air Transport (Asian Open Sky)>

- Building international air transport networks with Asian countries is important for activating local economy and improving consumers' convenience.
- Make a big change in Air Transport policy, and strategically promote Asian Open Sky with speed.

<Specific Plan>

- Promote KIX and NGO liberalization with negotiations.
- Accelerate liberalization of local airports, actual notification, active use of international charter flights.
- Strategic use of airports in capital, expand future capacity.
- Promote liberalization negotiations with Asian countries

<Further Internationalization of Haneda, International Airports in Big Cities Open 24 hours>

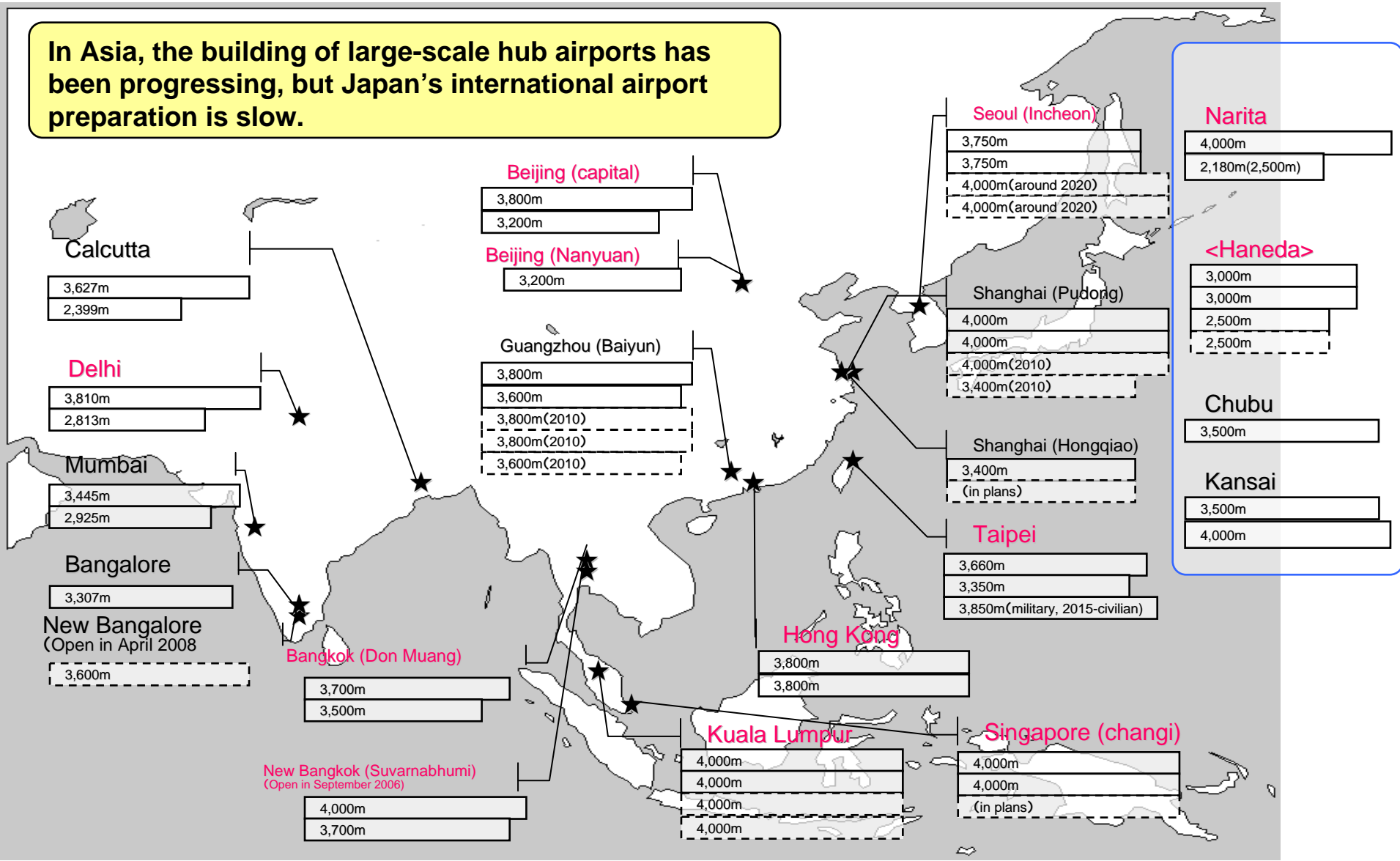
- International airports in big cities are important points for connecting domestic air networks to overseas.
- Promote internationalization, even before the re-expansion of Haneda.

<Specific Plan>

- Active promotion of late-night and early-morning charter flights.
- Begin discussion for international charter flights of special time zones.
- Expand slots during the day and expand international charter flights. Actualize charter flights with Shanghai Hongqiao Airport and special international charter flights during the Beijing Olympics.
- Strategic/all-in-one use of international slots at re-expansion.
- 30 thousand international commissions at the start of offering of service. Regarding route, consider a close one from appropriate routes for Haneda.
- Consider measures for capacity expansion of airports in the capital, as much as possible.



In Asia, the building of large-scale hub airports has been progressing, but Japan's international airport preparation is slow.





Narita Airport

March 2010

Parallel Runway (2500m), plans for completing expansion

国土地理院承認 平13総機 第367号

40 mile
(64 km)

Downtown

10 mile
(16 km)

Narita
Airport

Haneda
Airport

Haneda Airport

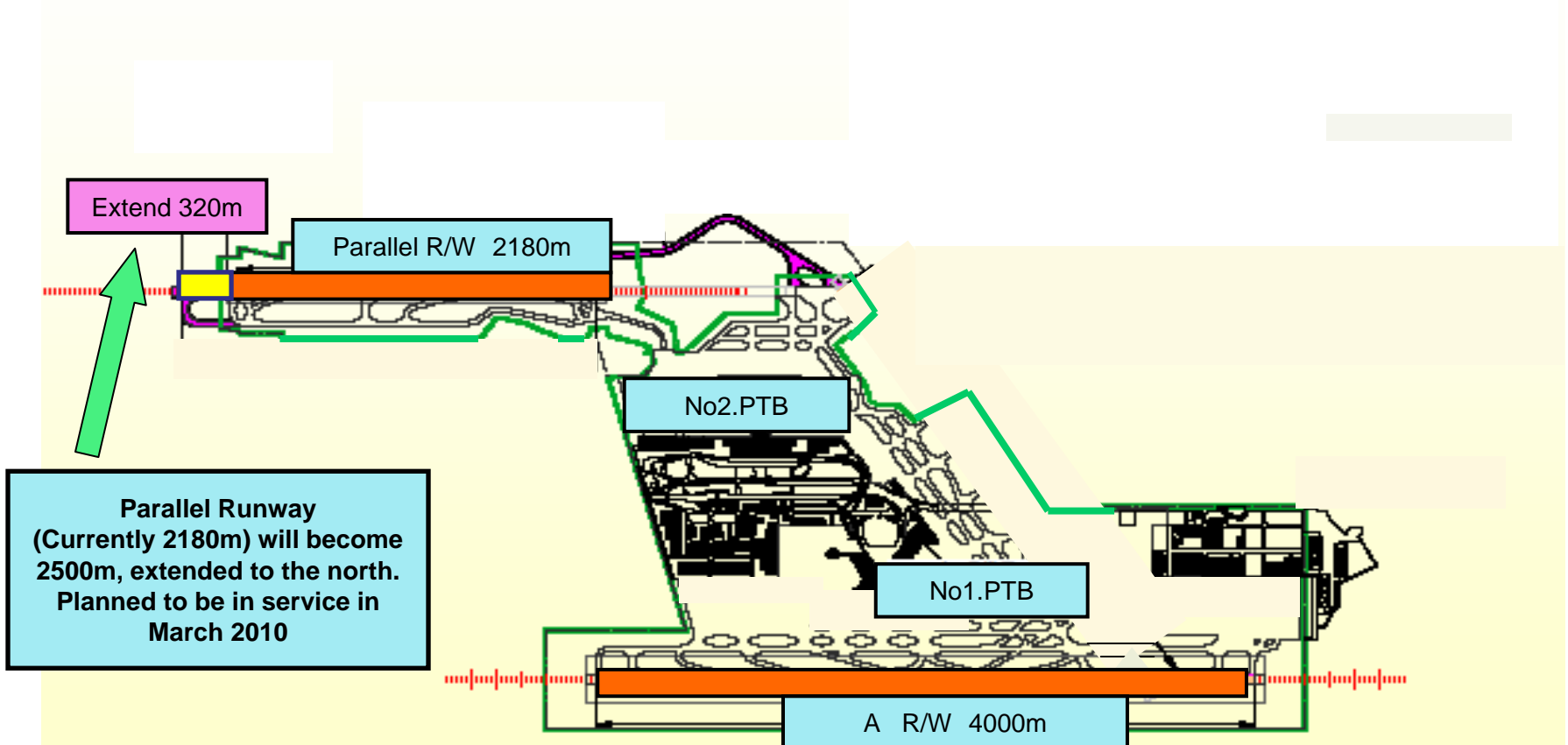
October
2010

D Runway (fourth), plans for preparing for service





- March 2010, the parallel runway will become 2500m, and large planes will be able to use it
- Maintenance of taxiways will be performed simultaneously, and the number of arrivals and departures will become 220,000 a year, with the consent of local residents. (An increase of 20,000).



Reference: November 2006, Ministry of Land, Infrastructure, Transport and Tourism;
2nd aviation section meeting on Council of Transport Policy

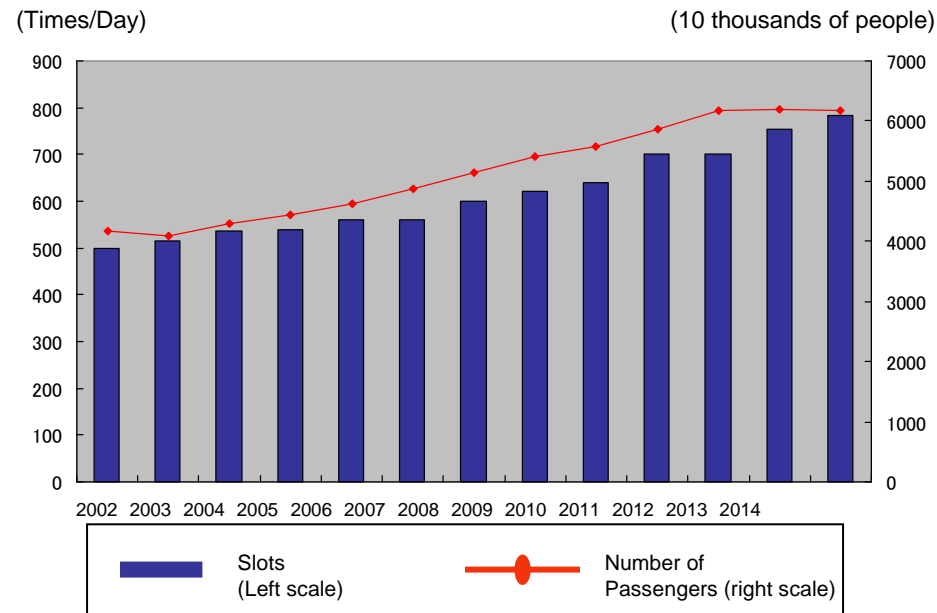
- Aiming for October 2010, planning to add a fourth D runway in Haneda
- Capacity will increase by 1.4 times of current state
- Commissions of international scheduled flights

Capacity will increase 1.4 times
 《An increase of 111,000 times a year (152 flights a day)》

<p>[Before re-expansion (October 1st 2005)] 30 flights an hour 296,000 flights a year 《405 flights a day (810 times)》</p>		<p>[After re-expansion] 40 flights an hour 407,000 times a year 《557 flights a day (1114 times)》</p>
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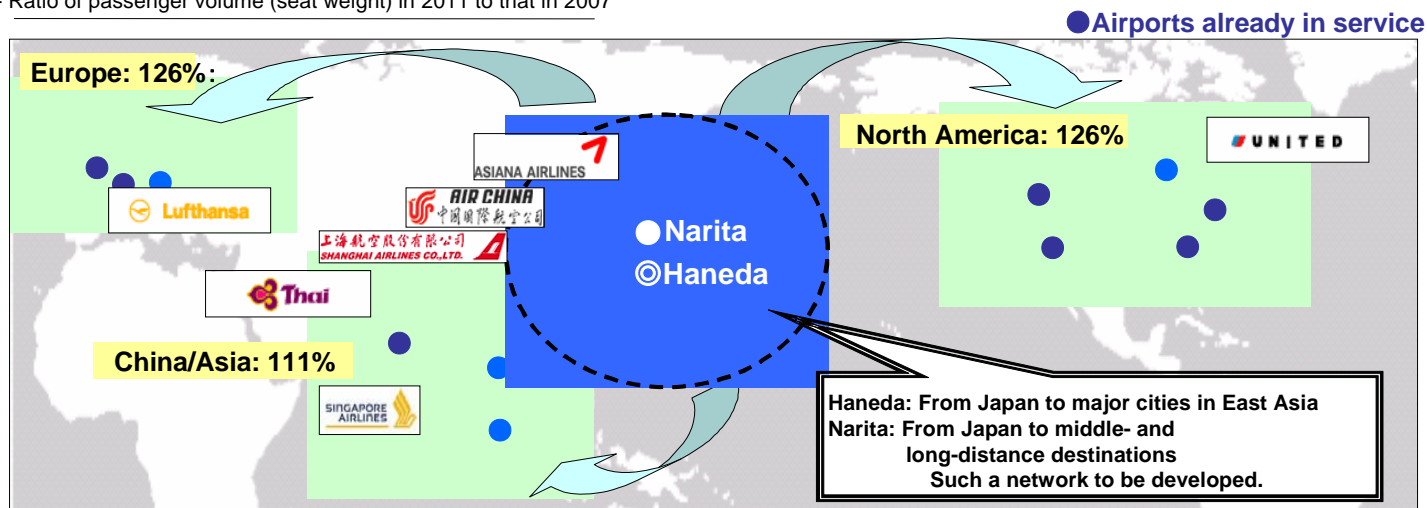
History of Haneda's Slots and Number of Passengers



ANA International Air Transport Passengers Business Strategy

Expansion of the network centered on Capital area for all destinations since 2010

- Ratio of passenger volume (seat weight) in 2011 to that in 2007



➤ Strengthening of the supply-demand adjustment for international airline service

- Airplanes for China are downsized and travel on a daily basis.
- Development of Fleet Assignment Model utilizing B787

- Fortification of the competitiveness of products and services
- Expansion of alliance and tie-up

From business scale expansion to profit growth

Thank you for your time.

