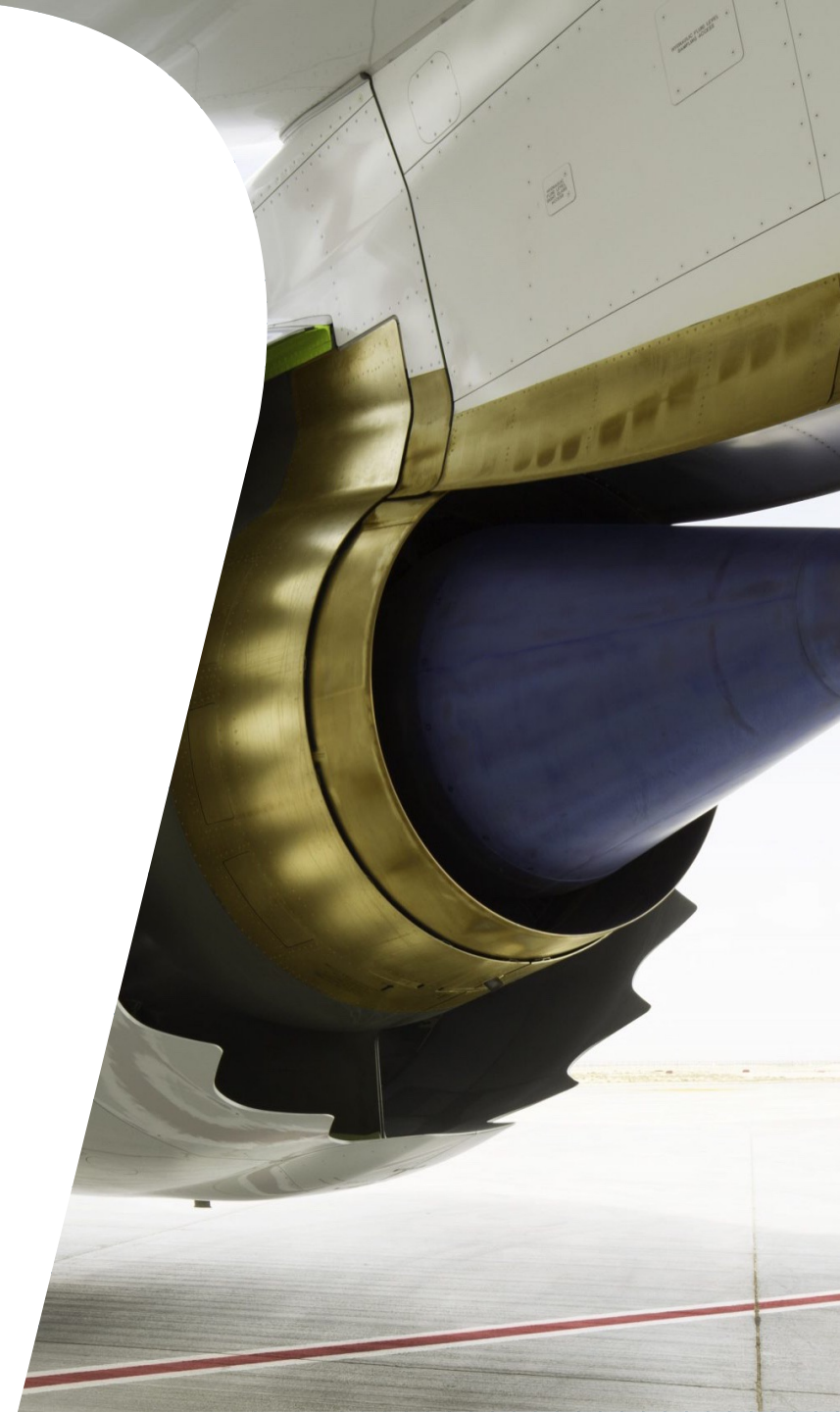


MRO Opportunities In China- Best Practices for Success

MRO Asia

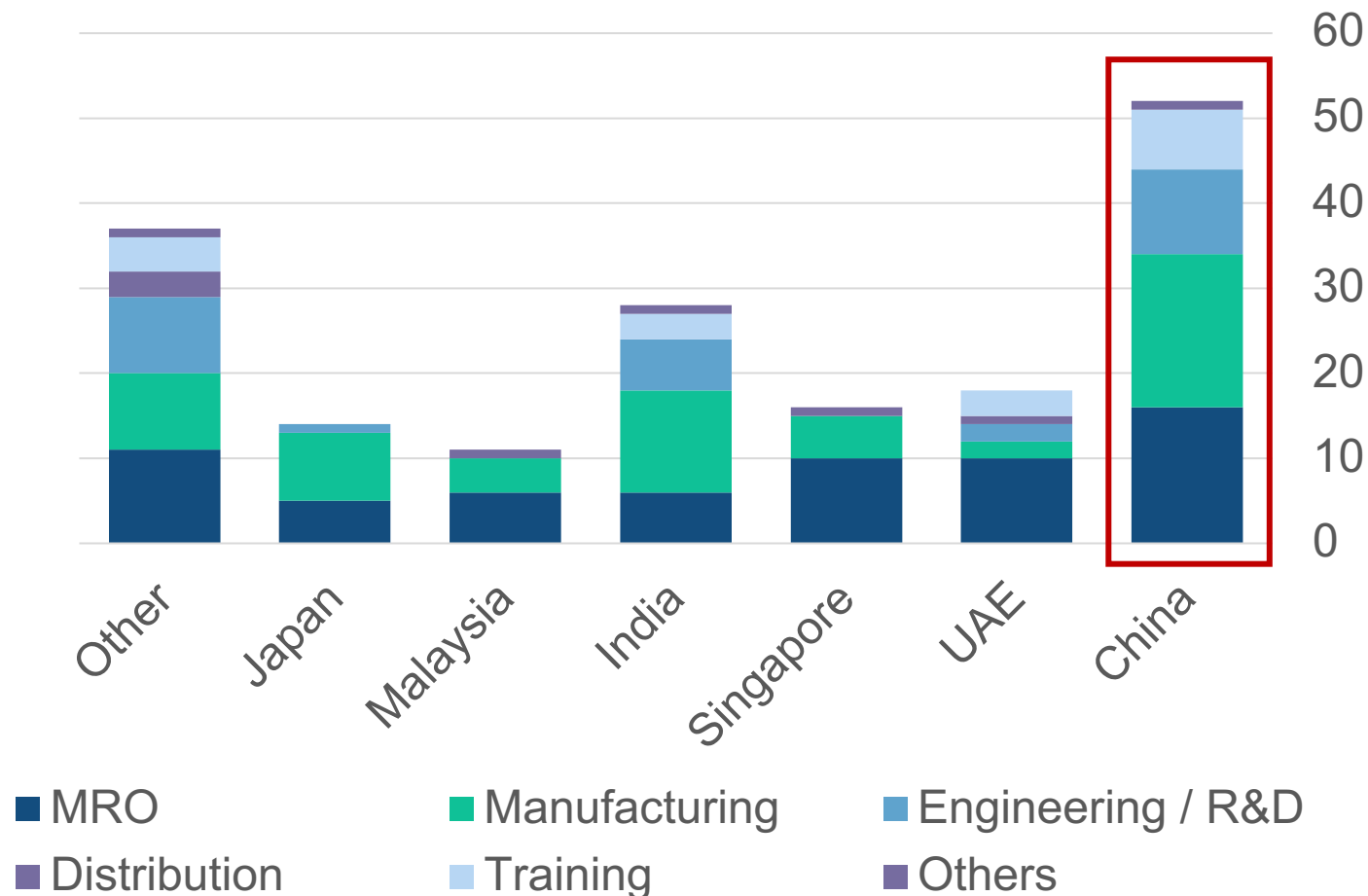
24 September 2024

PREPARED FOR



Chinese has been a center for aerospace investments over the past decade, including for MRO

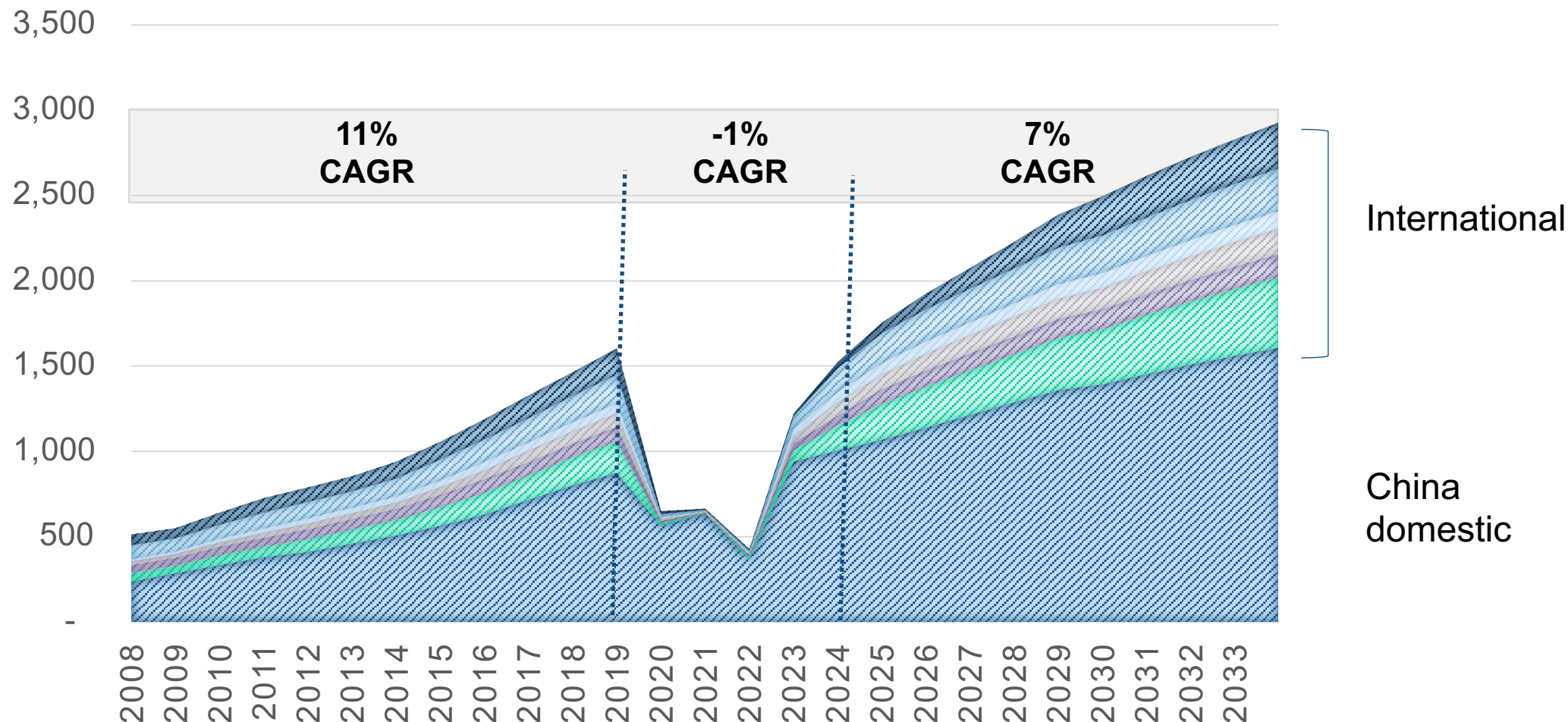
2013-2023 Major Aerospace Investments in Asia Pacific & Middle East*



- › Strong strategic ambition to build up aerospace industry in-country
- › Manufacturing is largest investment category
- › Also significant investments into MRO for
 - › Airframe
 - › Engine
 - › Components
- › Roughly half of investments are JVs between foreign and local parties

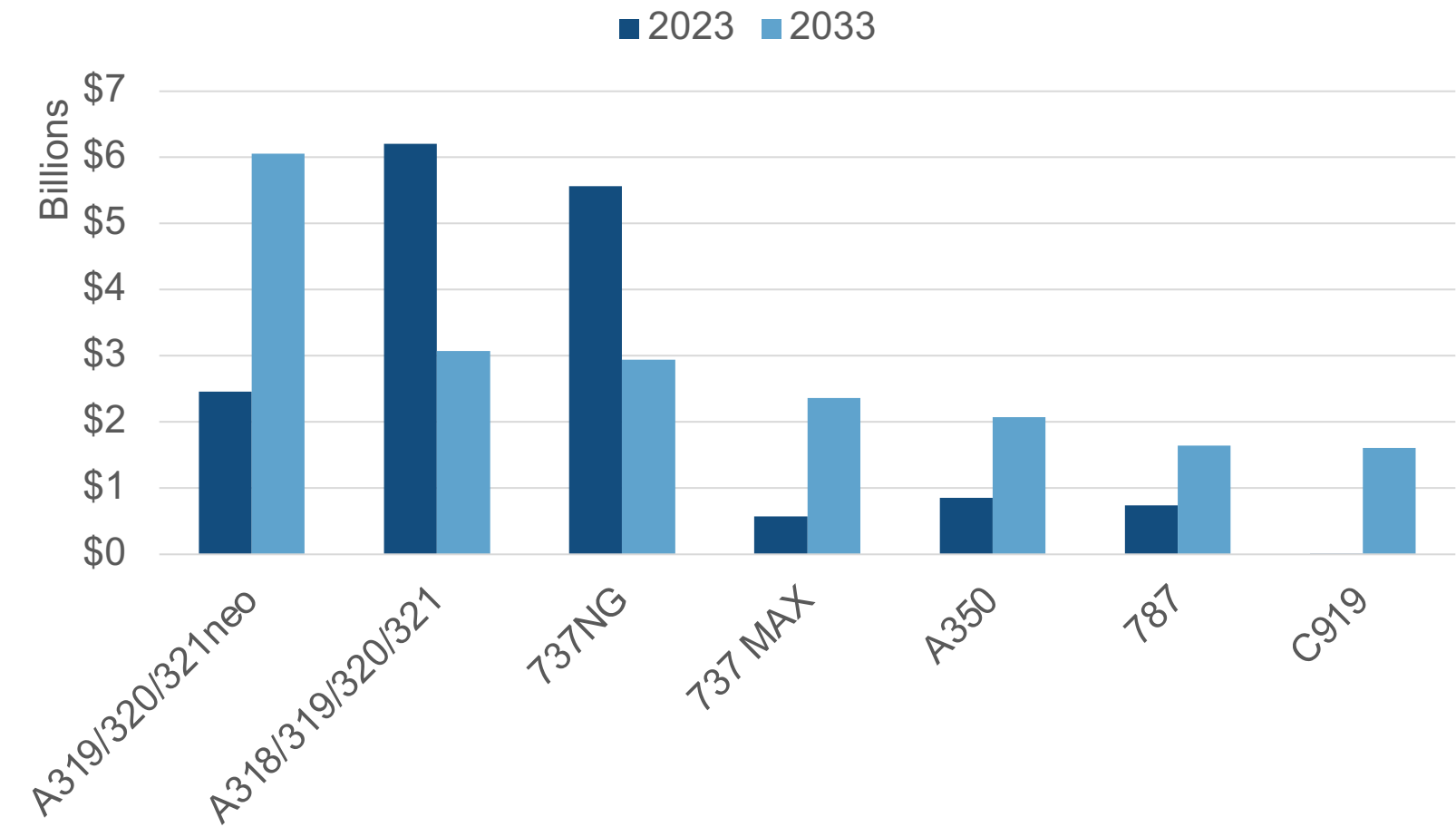
Chinese air traffic, which nearly tripled 2008-2019, is expected to continue growing the coming decade, albeit at a slightly lower rate

2008-2034 Actual and Projected Chinese Air Traffic (Revenue Passenger Kilometers, Billions)

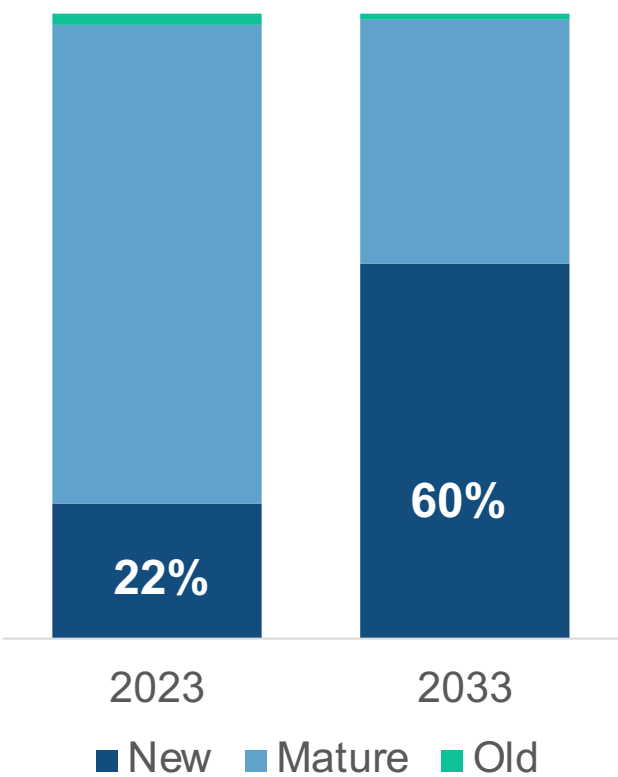


Chinese MRO faces a strong shift towards New Generation platforms – in 2033 60% of MRO will be New Generation

2023-2033 China Air Transport MRO Demand for Top 2033 Platforms



MRO Demand by Generation



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