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APPROACHING THE END ZONE OF THE PANDEMIC?

The "light at the end of the tunnel" is only a glimmer for carriers caged by shuttered international borders and sudden shifts in quarantine rules

Orient aviation 27 YEARS

Leading Asia-Pacific airlines reveal ruin of COVID-19 on their bottom lines

China takes its time to approve the MAX's return to Mainland flying

Airbus reports profit pickup in final 2020 quarter

ORIENT AVIATION MEDIA GROUP
17/F Hang Wai Commercial Building,
231-233 Queen's Road East,
Wanchai, Hong Kong
Editorial: +852 2865 1013
E-mail: christine@orientaviation.com
Website: www.orientaviation.com

Publisher & Editor-in-Chief
Christine McGee
E-mail: christine@orientaviation.com

Associate Editor & Chief Correspondent
Tom Ballantyne
Tel: +61 2 8854 1458
M: +61 4 1463 8689
E-mail: tomball@ozemail.com.au

North Asia Correspondent
Geoffrey Tudor
Tel: +81 3 3373 8368
E-mail: tudorgeoffrey47@gmail.com

Photographers
Rob Finlayson, Graham Uden, Ryan Peters

Chief Designer
Chan Ping Kwan

Printing
Printing Station (2008)

ADMINISTRATION

General Manager
Shirley Ho
E-mail: shirley@orientaviation.com

ADVERTISING

Asia-Pacific, Europe & Middle East
Defne Alpay
Tel: +44 771 282 9859
E-mail: defne@orientaviation.com

The Americas / Canada
Barnes Media Associates
Ray Barnes
Tel: +1 434 770 4108
Fax: +1 434 927 5101
E-mail: ray@orientaviation.com

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CONTENTS

Volume **28**, Issue **1**

It's not over until it's over

It is a sad truth global harmonization, more often than not, has been a bridge too far for the aviation industry. The battle to persuade the governments of the world to agree on a universal standard for COVID-19 testing for travellers has been unsuccessful. The detailed strategy of the International Air Transport Association (IATA), Airports Council International (ACI) and several umbrella aerospace bodies to demonstrate to political and health policy makers that it is safe to fly has fallen on deaf ears.

Complicating the introduction of universal standardized virus testing is that the wheels of the World Health Organization (WHO) and the International Civil Aviation Organization (ICAO) turn very slowly. Winning approval from all of ICAO's 193 member States for a testing standard for the coronavirus will be nigh impossible.

So, with the pandemic still very much alive across the globe and more contagious strains of the virus complicating the delivery of vaccines worldwide, airline hopes for recovery have been dashed – at least for several months into 2021. For carriers in the Asia-Pacific, a region particularly vulnerable to the loss of long-haul and transit travel, the short-term future is more cash burn, more months of grounded fleets and more instant schedule revisions.

Unless there is another round of government aid, distributed either by direct funding or by backing airlines when they go to the market to raise cash, more industry bankruptcies are unavoidable. Singapore has shown the way by backing not just its airlines but the entire aerospace and airport sector. At press time, in its 2021 annual budget, the city's government extended salary support for the industry for another six months.

At a recent industry briefing, a senior IATA director said carriers were suffering "death by a thousand cuts". It is fair comment. The benefits of vaccine rollouts will take months to convert to new rules for travellers; that is removal of the patchwork of quarantine restrictions attached to international air travel.

In the meantime, it is generally agreed the industry faces a two-stage recovery. Already, first world nations are receiving a disproportionate allocation of vaccines. Air travel will open gradually in parts of the world well-served by vaccination supply while less affluent nations will remain in the hot zone.

And there is another problem that has particular relevance for long-haul dependent Asia-Pacific airlines. While the science dictates aircraft cabins are about the best place to stay safe from COVID-19 given the level of contagion and fatalities in Europe, the U.S. and South America, who will want to fly from this region to these high risk destinations unless the journey is absolutely essential? That question will be answered in coming months.

In general, the industry believes airlines will be cash positive in the second half of 2021, but given the uneven battle to conquer COVID-19 across the world, that optimism seems highly questionable. ■

TOM BALLANTYNE
Associate editor and chief correspondent
Orient Aviation Media Group

Qantas green-lights A380 return and ultra-long haul "Project Sunrise" launch

Qantas Group, unlike several other airlines, will return its A380s to service - when the time is right. The carrier's' fleet of 12 of the type is parked at Victorville in California's Mojave Desert.

Group CEO, Alan Joyce, said in an interview with Eurocontrol last month "an A380 fully or nearly fully written down, if it generates cash, will absolutely work".

"Airports with slot restrictions, like Heathrow, where slots are extremely expensive, work for an A380. And the similar scheduling windows that worked for Australia are unique. So we do believe there is a need for that fleet and we do believe it will generate cash. It's going to be all about cash when we start up international," he said.

Another scheduling window for Qantas is North America. "If you have been in Los Angeles between 10 o'clock and midnight, you will see six or seven Qantas aircraft departing to Australia. It is the only time that works with curfews," he said.

Instead of flying multiple frequencies right on top of each other [out of Los Angeles] it could be done differently with A380s, Joyce said.

He also fleshed out the time line for the introduction of "Project Sunrise", the group's planned ultra-long-haul flights from Australia's east coast to London and North America.

"Before COVID-19, we had done three test flights. They were an amazing experience and we used them as test-research flights. Testing how our frequent flyers would feel, looking at pilot fatigue issues. We were taking it unbelievably seriously. We had designed a product. We had selected the A350-1000 and were weeks away from ordering it," Joyce said.

"We want to revisit it at the end of 2021 with the potential of doing it in 2024 and onwards. We are still very keen on it. We think it is one of the big things that will change in the next decade and will allow us to have a sustainable competitive advantage that nobody else is probably going to introduce." ***By Tom Ballantyne*** ■

International Air Transport Association chief economist announces retirement

In the last 12 months, the International Air Transport Association's (IATA) duo of **director general, Alexandre de Juniac,** and **chief economist, Brian Pearce**, have had the demanding duty of detailing the impact of COVID-19 on the global economy. Their exhaustive virtual briefings, often held for several consecutive weeks at the peak of the crisis, provided the world with authoritative financial, political and public health policies intended to set airlines across the global on the road to recovery.

But soon both leaders will depart the association. De Juniac, who has delivered five years of distinguished and passionate leadership at IATA, is stepping down on March 31. He will be succeeded by industry firebrand and former IAG boss, Willie Walsh, on April 1. Earlier this month, Pearce announced he too will change direction and retire from the association in July. Brian has been "an amazing asset to IATA", said de Juniac. "He will leave IATA having set a very high bar for its trusted economic analysis." ■

Agreement expands North Asia corridor to accommodate exponential airline demand

Japan, **Korea** and **China** have signed an agreement that has expanded capacity along the heavily trafficked North Asia flight corridor, **AKARA**.

The airway is split between countries whose air traffic controllers operate on different frequencies. Traffic using the AKARA corridor between Japan and South Korea has soared from 36,000 a year in 1983 to 212,000 in 2019, dramatically raising the threat of collisions from difficulties in communications with pilots, and turbulence or bad weather.

The AKARA corridor is made up of Flight Information Regions (FIR) Fukuoka, Incheon, Taibei and Shanghai.

Operations urgently need to expand to cope with the resumption in traffic post the pandemic.

The three countries recently signed an agreement that allows South Korea to take over Japan's role and guide flights in and out of Shanghai on behalf of China. The countries also will establish an airway from Korea to Japan and extend it to the Mainland.

Apart from the three signatories to the new agreement, delayed from last April, the corridor mainly has been utilized by U.S. and Canadian aircraft. Seoul, Tokyo and Beijing signed the original AKARA agreement in 1983. At that time, flights through the 519 kms long by 93 kms wide zone, which stretches from China to South Korea's FIR, near Jeju Island, and Japan's Fukue Island, were in their dozens daily.

Approval for an expanded AKARA was the result of a working group set up in January 2019, with representatives from the three AKARA nations and the International Civil Aviation Organisation (ICAO). After consensus was reached between the parties, implementation of the new rules was set back by COVID-19. The second phase of the agreement is tentatively scheduled to commence on June 17 after Korea and China establish an air route for all sections of the corridor. ■

More Asia-Pacific carriers detail ruin of pandemic on their bottom lines

By Jordan Chong

Some of the Asia-Pacific's largest airlines are cautiously optimistic that market conditions will improve later this year. Such sentiments were evident in the latest financial results from Korean Air (KAL) and SIA Group, published this past month, although All Nippon Airways (ANA) and Japan Airlines (JAL) were more guarded in their outlooks.

Airlines remained mired in loss-making territory from the ongoing impact of the coronavirus pandemic, but there was hope the rollout of COVID-19 vaccines would allow the borders to reopen to stem the flow of red ink.

Given it has no domestic market, SIA Group - Singapore Airlines, SilkAir and Scoot - has been particularly hard hit by travel restrictions imposed to contain COVID-19.

Nonetheless, the group's three carriers improved passenger numbers by 26%, to 195,000 in the three months to December 31, 2020, from 155,000 in the quarter to September 30.

Despite the quarter-on-quarter growth passengers flown declined 98.1%, from 10.1 million a year earlier. The airline group had 64 passenger aircraft operating at the end of December 2020 with 24 of the fleet flying cargo-only services. One hundred and twenty three of the group's aircraft were parked.

"In line with Singapore's progressive re-opening, the group expects to see a measured expansion of the passenger network over the coming months," SIA Group said in its latest financial results, which revealed a net loss of S$141.8 million (US$107 million) for the three months to last December 31 compared with a net profit of S$314.8 million in the previous December.

"Based on our current schedules, as of end-April 2021, the group's total passenger capacity is expected to be 25% of pre-COVID levels. We expect to serve around 45% of the points we flew before the crisis," the airline said.

"We will continue to monitor the status of travel restrictions and adjust our capacity accordingly to meet the traffic demand."

For the three months to December 13, group capacity, measured by available seat kilometres (ASK), was 14.2% of the same quarter in 2019.

Five days after the release of its latest results, the company informed the Singapore Exchange (SGX) it had reached agreements with Airbus and Boeing to defer aircraft due to be delivered between 2021 and 2023 to later years.

Updated projections are that the company will outlay S$20 billion in capital expenditure in the five financial years to fiscal 2025, down 18% of its previous forecast of S$24.4 billion.

An order for 14 787-10s was converted to 11 777-9s in response to "changes in its projected long-term fleet needs" beyond the fiscal 2026 financial year, the airline group said.

The revised order book is 35 A320 family aircraft, 15 A350-900s, 31 737 MAXs, 20 787 family planes and 31 777-9s.

"The agreements with Airbus and Boeing are a key plank of our strategy to navigate the disruptions caused by the COVID-19 pandemic," SIA Group CEO, Goh Choon Phong, said in a statement.

"They allow us to defer capital expenditure and recalibrate the rate we add capacity, aligning both with the projected recovery trajectory for international air travel."

KOREAN AIR POSTS 2020 OPERATING PROFIT

In early February, Korean Air (KAL) announced an operating profit on earnings before interest and tax (EBIT), of 283.3 billion won (US$258 million) for calendar 2020, down 17% from 286 billion won a year ago.

The Seoul -headquartered carrier said the result was underpinned by the strong performance of its cargo business and efforts to cut costs amid the devastating impact of the coronavirus pandemic.

KAL president, Keehong Woo, said the SkyTeam alliance member boosted its 2020 cargo operations to meet demand for medical supplies, particularly COVID-19 test kits and masks.

Reduced global air freight capacity from the grounding of a large number of passenger aircraft coupled with cargo demand holding firm had led to strong air cargo rates.

"We increased cargo capacity by converting passenger jets into freighters. We've done well to keep our cargo network strong and active," Woo said.

KAL noted the fragile nature of passenger demand in its annual results presentation. Signs of recovery on Jeju routes had "rapidly declined" in December after the country's regulator strengthened social distancing rules.

More immediately, the passenger demand decline from COVID-19 continued, but it was hoped "demand would recover gradually after full-scale vaccination in the second half of 2021," the carrier said.

In March, KAL is scheduled to issue 3.3 trillion won in new shares to improve its balance sheet and boost liquidity as well as prepare for its planned takeover of Asiana Airlines.

Purchase of South Korea's second international carrier was "inevitable to enhance the market's competitiveness and minimise the injection of public funds", the airline said.

KAL's net loss narrowed to 228.1 billion won in calendar 2020, from a 568.7 billion won net loss in the earlier year.

JAPAN'S BIG TWO CARRIERS CAUTIOUS AS NEW STATE OF EMERGENCY PUT INTO FORCE

Japan Airlines (JAL) posted a net loss of 212.7 billion yen (US$2 billion) for the nine months to December 31, 2020, compared with net profit of 74.8 billion yen in the previous 12 months.

The airline group downgraded its full-year forecast in response to the latest booking data for the remaining months of its fiscal year. Japan declared a State of Emergency for the second time on January 8. JAL said the market had not improved as it had expected.

In a regulatory filing on February 1, JAL said it was in line to post a net loss of 300 billion yen for the 12 months to March 31, 2021, a decline from an October 2020 forecast of a 240 billion to 270 billion yen net loss.

"At present, it is difficult to foresee the recovery of demand while the global spread of COVID-19 shows no sign of slowdown," JAL said in its third quarter results.

"The recovery of international and domestic passenger demand will [likely] be affected by border closure and travel restrictions by governments. Uncertainty on our further business performances is expected to persist," JAL said.

Previously, JAL had forecast international passenger demand would recover to 30%-40% of pre-COVID-19 levels by year end. Instead, it is predicted to be about 5% of pre-pandemic levels.

Domestic demand is calculated to be about 20% of last year's levels to March 31, JAL said. In October, the oneworld alliance member was looking forward to a domestic market increasing to 80% of 2019 figures.

It was a similar story at ANA HOLDINGS INC, the parent

company of JAL's rival, All Nippon Airways (ANA). It posted a net loss of 309.6 billion yen (US$2.9 billion) for the nine months to December 31, compared with a net profit of 86.4 billion yen for the same months in 2019.

The company said In a regulatory filing on January 29, its financial forecasts were unchanged from October, with a net loss of 510 billion yen predicted for its full fiscal year, to March 31.

While its guidance remained unchanged, ANA HOLDINGS INC said there had been changes in the market response to the latest coronavirus developments.

"At the end of Q2, we expected passenger demand to recover to about 50% of pre-COVID-19 times on international routes and about 70% on domestic routes by the end of the fiscal year," it said.

"Now we believe it will be difficult to recover due to sluggish demand caused by the second declaration of a [Japan's] State of Emergency.

"However, load factors on domestic flights in October and November exceeded 60%, which confirmed demand would recover rapidly after the spread of COVID-19 subsides substantially."

Asia-Pacific aviation will learn more about the state of the market on February 25, when Air New Zealand and the Qantas Group announce their 2020-20/21 first half numbers followed by Cathay Pacific Group's results on March 10. ■

China takes its time to approve MAX's return to Mainland skies

It has been a long hard road – approaching two years – for Boeing's troubled B737 MAX but it is finally returning to the skies, if only gradually, after the toughest regulatory safety checks and modifications ever performed by aviation authorities around the world. Associate Editor and Chief Correspondent, Tom Ballantyne, reports.

The MAX is back. Almost. After the much-maligned latest B737 type was cleared by the U.S. Federal Aviation Administration (FAA) to return to commercial service in November last year, several other national regulatory authorities have followed suit. Brazil's National Civil Aviation Agency (ANAC) cleared the jet soon afterwards with Transport Canada (TC) issuing its own Airworthiness Directive reinstating the aircraft on January 18. The European Aviation Safety Agency (EASA) announced it would approve the recertification of the MAX by the end of January, allowing it to return to the skies of the European Union almost two years after its grounding.

At press time, Chinese regulators confirmed "there was no set timetable" for clearing the MAX to fly again.

The MAX was grounded in March 2019 following two fatal crashes in Indonesia and Ethiopia, respectively, that killed 346 passengers and crew. The Maneuvering Characteristics Augmentation System (MCAS), inherent to the aircraft, was found to be the main cause of both crashes. The first commercial flight carrying paying passengers since the ungrounding was operated by American Airlines, from Miami to New York, on December 29.

What is not clear is how long it will take regulatory authorities in Asia, including China, Japan and South Korea, to clear the jet to fly in their skies. China is of particular interest in its approach to approval as its carriers are the world's biggest group of MAX customers, operating 97 of the global fleet of 371. The country's largest airline, China Southern Airlines, has ordered 34 of the type.

The slow comeback of the jet has come with even more pain for Boeing. In January, the U.S. Department of Justice announced the aircraft manufacturer had agreed to pay more than $2.5 billion in fines to resolve a criminal charge related to a conspiracy to defraud regulators about the MAX crashes.

"The tragic crashes of Lion Air Flight 610 and Ethiopian Airlines Flight 302 exposed fraudulent and deceptive conduct by employees of one of the world's leading commercial airplane manufacturers," acting assistant attorney general of the department of Justice's criminal division, David P. Burns, said. "Boeing's employees chose the path of profit over candor by concealing material information from the FAA concerning the operation of its 737 MAX airplane and engaging in an effort to cover up their deception."

Boeing's $2.5 billion fine breakdown is: a criminal monetary penalty of $243.6 million, compensation payments to Boeing's 737 MAX airline customers of $1.77 billion and the establishment of a $500-million crash victim beneficiaries fund to compensate the heirs, relatives and legal beneficiaries of the 346 passengers killed in the crashes.

The thoroughness individual national regulatory bodies have demonstrated to ensure the MAX could return to the skies was exemplified in Transport Canada's statement reinstating its airworthiness certificate. It said as part of Transport Canada's independent review process, the department's civil aviation certification and flight safety experts were instrumental in guiding the aircraft design changes. Additionally, the department has introduced unique Canadian measures to further enhance the safety of the aircraft.

"In addition to all reviews, and to provide additional assurances that all measures are in place, an Interim Order that clearly indicates Transport Canada's expectations and requirements for additional training for crew members was issued for operators. It is complementary to the design and maintenance requirements of the Airworthiness Directive."

In 2020, 27 MAXs were delivered; all of them in December after the type received approval to return to service in the U.S. American Airlines took 10, United Airlines eight and lessor, CIT Leasing, four. The type won 112 new orders, including 25 from Virgin Australia (VA) in November, 75 from Ryanair and seven from undisclosed customers. It is not known, however, if the VA order will be adjusted now it has a new owner.

Overall, 737 orders took a massive hit in 2020. At the end of December 2019 Boeing had a backlog of backlog of 4,389. A year later, it had fallen away by 1,068 aircraft to 3,321. ■

APPROACHING END ZONE OF PANDEMIC?

International Air Transport Association sees "light at the end of the tunnel", but it's only a glimmer of hope for Asia-Pacific airlines caged by shuttered international borders and patchwork quarantine regulations. Associate editor and chief correspondent, Tom Ballantyne, reports.

Glad to see the back of 2020, Asia-Pacific carriers now fear the coming year could be just as bad. Instead of a relaxation of border restrictions and quarantine rules, the opposite is happening, dampening hopes of a tentative recovery in international travel in coming months.

International Air Transport Association (IATA) senior vice president airport passenger cargo and security, Nick Careen, put it bluntly. Airlines are suffering "death by a thousand cuts. Things are not improving. Restrictions are going in the opposite direction", he said last month.

IATA colleague, chief economist, Brian Pearce, added the short-term outlook "has certainly darkened. The vaccine should make all the difference so the second half of the year should be different. We are hoping this is the darkness before the dawn. But it really depends on governments co-operating", Pearce said.

In a forecast critical for many of the Asia-Pacific's major airlines, Pearce said long-haul travel will not return to 2019 levels for another two to three years.

The analysis was delivered at a virtual industry briefing from Geneva last month at the same time COVID-19 was continuing its devastating sweep through the U.S., the UK, continental Europe, Africa and several Asian countries including Malaysia, Japan and Korea. In the northern hemisphere, case numbers and fatalities have risen to record levels with two new strains of the virus, far more contagious than the original version, spreading in the UK, South Africa, the U.S. and Brazil. At press time, it was being diagnosed in several other clusters worldwide and vaccine manufacturers were on the hunt for treatments to hold back a deluge of the new strains.

Governments have reacted quickly to the new COVID-19 threats. U.S. president Joe Biden has ordered all incoming international passengers landing in the country to quarantine. The UK has banned travellers from some 30 "hot spot" countries and introduced quarantine for the first time since the coronavirus became a pandemic. It has banned flights




from the United Arab Emirates, throwing a spanner in the operations of the big three Gulf carriers who have been providing flight links between the UK and the Asia-Pacific.

In a press statement, Etihad Airways said although flights from the UAE are banned, it would continue to operate for passengers permitted to depart the UK for travel to Sydney and Melbourne. "As a result, all flights from the UK remain unaffected and will operate as scheduled, keeping a vital link between Europe and Australia open for urgent travel," it said. Etihad did not explain how it could continue the services if the airline was banned from flying into the UK.

In Asia, quarantine and travel restrictions have been toughened in Korea and Japan has reintroduced a State of Emergency. In Australia, where COVID-19 is almost non-existent, the national government has told its citizens they should not expect to travel internationally until 2022 and that its 14-day hotel quarantine for arriving passengers was not going to be lifted any time soon.

Hong Kong extended its quarantine requirements from 14 days to 21 days in designated hotels just before Christmas and also announced it intended to implement 14-day hotel quarantine for Hong Kong-based cockpit and cabin crew plus a 7-day medical surveillance period.

Cathay Pacific Group chief customer and commercial officer, Ronald Lam, said in the final week of January "the new measures will have a significant impact on our ability to service our passenger and cargo markets".

"At this stage, our preliminary assessment is the new measure may result in a reduction of current passenger capacity by about 60%, a reduction in cargo capacity of around 25% and an increase in our cash burn of approximately HK$300 million-HK$400 million (US$38.7 million-US$51.61 million) per month on top of our current HK$1 billion-HK$1.5 billion levels," Lam said.

Cathay, which has no domestic operations, was already in dire straits. It carried 39,989 passengers in peak season December, a decrease of 98.7% compared with December 2019.

In China, where domestic airline capacity had returned to near normal levels, it was clear a nervous population was voting to remain on the ground as new strains of the virus emerged. Airline bookings made by January 19 for the February Lunar New Year holiday were 73.7% lower than for the same holiday period last year, reported travel analytics firm, ForwardKeys.

Beijing had reported no new COVID-19 diagnosis cases for 11 consecutive days, but nationwide case numbers, while tiny by the standards of most Western countries, are at 10-month highs. State media said many employees working for state-owned companies or government agencies were told not to travel without management approval.

In Japan, Japan Airlines (JAL) and All Nippon Airways (ANA) were moving towards a full domestic rebound as 2020 was drawing to a close. Both carriers were planning to

operate approximately 85% of their pre-COVID-19 schedule in December and increasing it to 90%-100% from December 25, 2020 to January 5, 2021. These estimates were progressively reduced as the latest spike worsened. Much more significant cuts were announced following the declaration of the second State of Emergency on January 8.

JAL reported domestic reservations for the holiday period were down by 52% from the previous year. ANA said it had carried 58% fewer domestic passengers during that period. International traffic also was hit. ANA announced it would suspend services on 16 international routes from late March due to falling travel demand from the coronavirus pandemic. It's most recent network changes have eliminated about 80% of its international flights from its previous plans.

Another casualty of the new pandemic surge has been bilateral travel "bubbles", widely regarded as a key plank in the recovery of international passenger traffic. In January, Australia promptly closed down its air corridor with New Zealand, where Australians where not allowed to fly to New Zealand but New Zealanders had been permitted to fly to Australia, after a case of the highly contagious UK coronavirus strain was confirmed in Auckland. Fortunately for trans-Tasman carriers, the bubble has been re-instated.

In the final days of last month, Singapore announced reciprocal arrangements with Malaysia, Germany and South Korea would be suspended for three months from February 1. Singapore's Ministry of Foreign Affairs said the decision was the result of a resurgence of COVID-19 cases worldwide. Its link with Malaysia had been operating since August, with Korea in September and Germany in October.

In its latest results statement, the SIA Group struck a positive note, despite the cancellation of Singapore travel bubbles. "The resurgence of COVID-19 infections, as well as the spread of more transmissible strains of the virus weighs on international travel, as border controls and travel restrictions continue to tighten in many countries," it said.

"Nonetheless in line with Singapore's progressive re-opening, the group expects to see a measured expansion of the passenger network over the coming months. We will continue to monitor the status of travel restrictions and adjust our capacity accordingly to meet demand."

In its preliminary traffic results for the 2020 calendar

year, the Association of Asia Pacific Airlines (AAPA) said 69 million passengers were transported by the region's airlines in 2020, which represented 18% of volumes recorded in 2019. The decline in the 12 months had "not be seen in the region's history of commercial aviation", the AAPA said. Offered seat capacity was similarly disastrous at 19% of levels recorded in 2019. International passenger load factor averaged 61% of already ravaged networks.

"The dismal numbers underline the severity of the pandemic's impact on the airline industry. The discovery of several effective vaccines towards the end of 2020 provided hope recovery was on the horizon as large-scale vaccinations of citizens were expected to give governments the confidence to allow admission of travellers from abroad without restrictions", AAPA director general, Subhas Menon, said.

"Looking ahead, many industry challenges remain as restrictions on cross border travel will continue to affect air travel demand in 2021. We encourage governments to step up coordination efforts on cross border risk mitigation measures and health protocols. The implementation of harmonized protocols, incorporating the ICAO CART Take-Off Guidance, is imperative for the safe resumption of travel. Asia-Pacific aviation is ready and willing to play its part in the successful restart and recovery in the region."

Despite being trapped by the crisis, IATA's consistent appeal for a harmonized global testing regime for travellers is being ignored by most governments. Political leaders, understandably, are focused on protecting the health of their citizens rather than opening borders. Careen said shutting down traffic is a widespread movement. "It's in the U.S., Canada and the UK and elsewhere," he said.

"We are not in a position to control how countries manage their borders, but we maintain there is a safe way to do it and manage international traffic. We can't simply be reliant on the vaccines to be the enabler. There has to be some measure of metrics. We need some leadership from the WHO (World Health Organization) and ICAO (International Civil Aviation Organization) in order to encourage States to agree a trigger to allow things to restart.

"We can't continue to operate like this. It does not take a rocket scientist to note the burning of cash that is happening and to see bigger issues that could be loss of operations, loss of schedules and increased costs. The impacts are enormous."

In the face of the deteriorating pandemic situation, IATA again has urged governments to produce a global framework for COVID-19 testing to enable smooth travel. "These last weeks have seen governments impose even more severe travel restrictions following the recent diagnosis of new COVID variants that have halted the little recovery that had been happening in air travel," said IATA director general and CEO, Alexandre de Juniac. The association supported the immediate exemption of vaccinated individuals from travel restrictions, he said.

A key element of IATA's strategy is a digital Travel Pass. The app will allow passengers to create a 'digital passport' to verify their pre-travel test or vaccination meets the requirements of their destination country. They also will be able to share the test and vaccination certificates with authorities and airlines to facilitate travel.

Emirates Airlines, Etihad Airways and Qatar Airways are the first carriers to trial the Travel Pass. "We are planning additional pilots, with more functionality, with British Airways and Singapore Airlines [this month], "Careen said. "With the results of those pilots, we will be onboarding additional pilots and tests with Qatar Airways, Emirates, Etihad and more to come." Air New Zealand will trial the app in coming weeks.

In February, at the release of the industry's full-year results, de Juniac said 2020 was a catastrophe for the industry. The first weeks of 2021 were no different. "In fact, it was worse over the year-end holiday period. While we still see airlines turning cash positive within the year, the near-term picture is bleak. Instead of a boost from the year-end holiday period, we had even more restrictions. Governments tightened borders in a knee-jerk response to a virus mutation. Canada, UK, Germany, Japan and others added testing to

> **Understanding government policy benchmarks and agreeing to global standards needed to support a return to normality in travel will ensure that air transport is well prepared and does not become a meaningful vector for reimportation. Airlines are ready to support governments in this task. But even as the crisis deepens, it is important to prepare for a resumption of flights when the epidemiological situation permits**
>
> **Alexandre de Juniac**
> IATA director general and CEO

> We can see the light at the end of the tunnel as vaccination programs roll out. Turning this vision into a safe and orderly re-start will require careful planning and coordination by governments and industry. This will be challenging as the priority for the weeks and months ahead will be containing the spread of new variants
>
> IATA February 2021

their COVID-19 measures without removing quarantine requirements. In other words, they have chosen policy measures that will shut down travel," he said.

"This tells us these governments are not interested in managing a balanced approach to the risks of COVID-19. They appear to be aiming for a zero-COVID-19 world. This is an impossible task that comes with severe consequences of which the full extent would be impossible to calculate. But with this approach, we know for sure that the travel and tourism economy will not recover. Jobs will continue to disappear and the lockdown's toll on people's mental health will continue to grow, particularly for those separated from loved ones."

IATA's grim forecast was mirrored by Airports Council International (ACI) World with a new report that said recovery in 2021 would be slow and uncertain and that without government policy support and assistance, the industry continues to face collapse.

ACI World's most recent COVID-19 impact analysis revealed the global airport industry had experienced a reduction of more than six billion passengers by the end of 2020, representing a decline of -64.2% in global passenger traffic, with a reduction in revenue of $111.8 billion.

Its newly published World Airport Traffic Forecast reveals over the next five years global passenger traffic worldwide is expected to grow at an annualized rate of +2.4%, affected negatively in the short term by the continuing effects of the pandemic. It said recovery is likely to be uneven across the world. While markets with significant domestic traffic are not expected to recover to pre-COVID-19 levels before 2023, markets with a significant share of international traffic will recover much more slowly.

ACI believes this slow recovery will only be possible if governments introduce a consistent approach to testing to promote travel and also do away with restrictive quarantine measures.

"The prospects for recovery in the aviation industry have taken a hit following the introduction of renewed travel restrictions and lockdowns in response to new variants of the COVID-19 virus emerging," ACI World director general, Luis Felipe de Oliveira, said.

"While ACI forecasts show there is a pathway for a long-term recovery, this can only be possible if a solid foundation can be laid in the short term with government policy support and direct assistance. The rapid deployment of vaccines is welcomed but there will be a considerable period before they are widely available so, in the meantime, there must be a proportionate approach to vaccination before travel balanced with a risk-based approach to testing."

In the Asia-Pacific, ACI Asia-Pacific director general, Stephano Baronci, forecast last month traffic at the region's airports would return to 2019 levels of 3.4 billion passengers a year by 2023.

In its latest statement, the AAPA stressed cargo remained a bright spot in the face of the pandemic. Asia-Pacific airlines account for more than a third of global air cargo traffic with strong networks and logistics expertise built up over the years. During the global pandemic, the region's carriers have played a vital role in transporting medical supplies including vaccines, personal protective equipment and other essential goods, even though capacity was severely restricted as a result of the wide-scale grounding of passenger aircraft. As global economic activity rebounded in the latter half of the year, the increase in export orders grew with the rising demand for the speedy delivery of merchandise by air.

Healthy cargo business was largely the source of Korean Air's (KAL) 2020 operating profit of US$219 million. International passenger demand declined by 75.6% over 2019 for the carrier and most of its flights are suspended. KAL has had its employees on rotating leave since last April.

KAL's full-year international cargo business declined by 11.8% over the same months in 2019. Despite a sharp drop in freight capacity, KAL president, Keehong Woo, said the airline "fully utilized its 23 freighters, increasing its operation rate by 25% compared with previous 12 months".

"Almost 24% of global cargo capacity disappeared last year when airlines suspended most international flights because of COVID-19. At Korean Air, we boosted our cargo operations by operating extra/charter freighters to meet demand for medical supplies

such as COVID-19 test kits and masks. We also increased capacity by converting passenger jets into freighters," Woo said.

In its third quarter results announced on February 4, the SIA Group made clear it expected cargo demand to improve in coming months.

"Airfreight capacity remains constrained due to the steep reduction in passenger flights and this has affected belly hold capacity worldwide. While cargo demand has tapered off after the traditional year-end period, strong fundamentals and healthy Purchasing Managers' Index readings across key export economies will continue to support cargo demand in coming months," it said.

"Furthermore, as the production of COVID-19 vaccines ramps up, SIA Cargo is looking to capture its share of the traffic to Asia and the Southwest Pacific."

Last December, air cargo demand improved in freight tonne kilometres (FTK), recording only a single digit year on-year decline of 6.4%. For the calendar year, international air cargo demand fell by 15.5%, while offered freight capacity plunged by 24.4%. The average international freight load factor rose significantly, by 7 percentage points, to 66.4%, in 2020, with cargo yields offering a welcome boost to operating revenue, although airlines continued to face an existential crisis with commercial passenger operations at a standstill, the AAPA said. ■

IATA boss reveals carnage of COVID-19 on industry

We already knew it, but now it is official. Last year was the worst 12 months in the history of global aviation.

The International Air Transport Association's (IATA) 2020 full-year global passenger traffic results documented demand, or Revenue Passenger Kilometers (RPKs), declined by 65.9% compared with full-year 2019. International passenger demand was 75.6% below results for the previous 12 months. Capacity measured in Available Seat Kilometers (ASK) declined 68.1% and load factor was down by 19.2 percentage points, to 62.8%. Domestic demand for the year, although better performing than the international sector, was 48.8% lower than in 2019.

"Last year was a catastrophe. There is no other way to describe it," said IATA director general and CEO, Alexandre de Juniac. "What recovery there was during the northern hemisphere summer season stalled in autumn. It became dramatically worse over the year-end holiday season when governments imposed more severe restrictions on travel following the emergence of new strains and fresh outbreaks of COVID-19.

The airline association said bookings made in January for future travel were 70% lower than in January last year, a situation that was putting increased pressure on airline cash positions and potentially impacting the beginnings of recovery.

In the Asia-Pacific, full-year traffic at airlines plunged 80.3% compared with 2019, the deepest decline for any region worldwide. In December alone, traffic collapsed by 94.7% amid stricter lockdowns and was little changed from a 95% decline in November. Full-year capacity tumbled by 74.1% against a year earlier and load factor tracked downward to 61.4%. China's domestic passenger traffic, one of the few countries in the region to benefit from a recovering domestic market, was 30.8% lower in 2020 compared with the previous year.

Air cargo was a bright spot for the industry in the reported period. Air freight traffic decreased by 10.6%, but the sector still recorded the largest drop in year-on-year demand since IATA began monitoring cargo performance 30 years ago.

Asia-Pacific carriers reported a cargo demand decline of 15.2% for the year over 2019. There was a 13.2% fall off in international operations, an overall capacity reduction of 27.4% and a 26.2% decline in international operations. After a Q3 pause in recovery, demand has been improving, largely driven by a rebound in manufacturing and export orders from China and South Korea.

In the Asia-Pacific and also the Middle East, the path to recovery will be "slow and uncertain" with "a diverse demand recovery pattern", said ACI Asia-Pacific director general, Stefano Baronci, last month.

However, in the next two decades, the regions will be the fastest growing the world with Asia-Pacific passenger travel to increase by 4.7% a year.

"This forecast is based on the assumption an effective vaccine is distributed in 2021 and broader population vaccination is largely accomplished by early 2022," Baronci said. "Limited vaccine supply and slow distribution combined with a prolonged economic downturn risks postponing the recovery of the whole region to 2024."

The airport association said the region's fastest growing markets in the next 20 years will be Indonesia, India, Vietnam, The Philippines and China. The top three markets in the Middle East will be Saudi Arabia, the United Arab Emirates and Iran, it predicted.

"For the aviation industry to continue providing vital services and supporting the global vaccine distribution undertakings, ACI Asia-Pacific urges the inclusion of all aviation workers and airport staff as essential workers as part of the World Health Organisation's Strategic Advisory Group of Experts on Immunisation recommendations and national vaccine plans," the association said.

Airbus and Boeing trim production rates as airlines put off purchase commitments

The global pandemic played havoc with the order books and delivery schedules of aircraft manufacturers in 2020. Will 2021 be much better? Associate editor and chief correspondent, Tom Ballantyne, reports.

It is promising to be another tough year for plane makers as airlines continue to park huge numbers of their fleets because several nations are maintaining or increasing severe restrictions on travel, including costly and lengthy quarantine rules that deter a return to flying.

At the end of last year, aviation data consultancy, IBA, said there was a marked difference in the aircraft orders, cancellation and delivery positions of the world's two largest aircraft manufacturers. Airbus topped the table of net orders, followed by Sukhoi and China's COMAC. For the first time, Boeing finished last. It had a large negative net order total as a result of cancellations, mainly for the 737 MAX, which dwarfed its 2020 orders.

Airbus will deliver above 550 aircraft this year, of which three quarters will be from the A320neo family. Boeing is forecast to deliver 455 aircraft. The MAX will account for 75% of the commitments, up significantly from its provisional 2020 total of 83 aircraft predicted because of the ungrounding of the type in several market markets, IBA forecast.

Storage levels for most aircraft types are around 30%, which is twice pre-COVID-19 levels, but considerably less than the 60% of aircraft parked during the first peak of the pandemic. Fuel efficient, next generation narrow-bodies are returning to service fastest with only 20% of the fleet in storage. Demand for wide-bodies is predicted to be the slowest to recover.

IBA has adjusted its aircraft market values since its last update in July 2020. In the narrow-body segment, the values of the A321neo, A220-300 and 737 MAX 9 are holding steady, whereas the A320ceo has been adjusted downwards by 13%. In the wide-body aircraft sector, A350-1000 and A330-900 market values remain in line with the second half of 2020. But the 777-300ER has been adjusted downwards by 9% and the A380-800 by an average of 36%.

It said there will be half the number of new leases in 2020 compared with the previous year. Rates for a four-year-old B787-8 have been reduced by 14%, an A350-900 of a similar age by 10% and a 12-year-old A330-300 by 15%.

The damage done to major manufacturers last year is evidenced in their annual announcements on orders and deliveries. Last month, Boeing said it had recorded 157 deliveries and 184 gross orders in 2020, but an avalanche of cancelations resulted in -1,026 net orders. The 2020 year compared with 380 deliveries, 246 gross orders, and -87 net orders in 2019. There were five B787-8 deliveries in 2020. Additional to its MAX global grounding, quality issues and inspections on various composite fuselage and tailplane segments forced Boeing to suspend all Dreamliner deliveries after October.

"While limiting our 787 deliveries for the quarter, these comprehensive inspections represent our focus on safety, quality and transparency, and we're confident we're taking the right steps for our customers and for the long term health of the 787 program", said chief financial officer, Greg Smith, in a media statement.

Only four 777-300ERs came off Boeing's Everett production line last year, but the B777F was more popular including a commitment for six from DHL. The cargo, package and courier airline also ordered eight additional freighters out of the thirteen added to the book. At the turn of the year, Boeing had a gross backlog of 4,997 aircraft.

Airbus said its 2020 deliveries demonstrated resilience in the face of the pandemic, with 566 commercial aircraft, 34% fewer than in 2019. It took 383 new aircraft orders, 268 net orders and has a backlog of 7,184 aircraft.

"Working hand-in-hand with our customers allowed us to navigate a difficult year," said Airbus CEO, Guillaume Faury. "The Airbus teams, customers and suppliers truly pulled together in the face of adversity to deliver this result. We also thank our partners and governments for their strong support of the sector. Based on our 2020 deliveries, we are cautiously optimistic as we look into 2021, although challenges and uncertainties remain high in the short term."

Last month, Airbus announced it had slowed a planned ramp up in aircraft production after a global surge in coronavirus cases dealt a fresh blow to demand. Output of the A320 series narrow-body, Airbus's best-selling model, will increase gradually to 45 per month through the fourth quarter. Airbus had previously targeted a faster jump, to 47 monthly by July.

The decision marked a retreat from the optimism of last October, when Airbus told suppliers to prepare for a sharp increase in narrow-body rates in the second half of 2021. Since then, fast-spreading variants of the corona virus have sent case counts soaring, despite the start of vaccine rollouts. The developments are raising concerns an anticipated air travel rebound in the northern hemisphere Summer might be delayed.

Airbus aims to produce 43 A320 series jets per month, an increase from 40 currently, before the rate changes again. The manufacturer will hold off on a potential increase in production of the A350 wide-body this year. As planned, output of the A220, Airbus's smallest model, will rise by one to five per month from March 31. ■

> There have been 33 airline failures with another 11 carriers seeking protection. The failure rate in 2020 would have been far greater were it not for unprecedented government support packages that far exceeded $150 billion.
> With aid uneven, airlines that should have failed have been able to struggle on. Initial bail-out packages are long gone and lessors, governments and financiers will be faced with more difficult decisions in their dealings with airlines. Most government support is expected to be removed in 2021, but not without an additional boost. Albeit, alternative solutions to more debt are necessary
>
> IBA consultancy 2021

Toulouse predicts 2021 aircraft deliveries will mirror 2020 numbers

Airbus CEO, Guillaume Faury, when announcing the conglomerate's annual results for 2020 earlier this month, said: "the decrease in the value of the commercial aircraft backlog reflects the higher number of deliveries compared with order intake, the weakening of the US dollar and an assessment of the backlog's recoverability".

Airbus has posted a calendar 2020 net loss of 1.13 billion Euros (US$1.36 billion) on a revenue decline of 29%.

Customers accepted 566 Airbus planes in the 12 months, down 34% from 863 in 2019. The 2020 commercial deliveries were 38 A220s, 446 A320 family, 19 330s, 59 A350s and four A380s.

"During the fourth quarter of 2020, 225 commercial aircraft were delivered, including 89 last December," the results statement said.

Net commercial aircraft orders were 268 (786 in 2019) with the order backlog at 7,184 commercial aircraft at December 31 last year, Airbus said.

"As the basis for its 2021 guidance, the company assumes no further disruptions to the world economy, air traffic, the

company's internal operations and its ability to deliver products and services," it said.

"On that basis, the company targets at least to achieve the same number of commercial aircraft deliveries in 2021 as in 2020."

In the final quarter of last year, Airbus earned a profit of 1.55 billion Euros compared with a net loss of 3.55 billion Euros in the same months in 2019. Its net cash flow position at the close of the year was 4.3 billion Euros compared with 12.534 billion Euros a year earlier. ■

Papua New Guinea's PNG Air to the rescue of country's remote communities

By Tom Ballantyne

The struggle to defeat the pandemic is tough enough in the Asia-Pacific's developed countries. Their population centres are well connected by air, road and rail links and their populations served by sophisticated medical facilities. But there are some parts of the region that are hard to reach and where combatting the virus is a major challenge.

This is precisely the case in Papua New Guinea (PNG) where many people live in remote communities across the country's mountainous, densely forested terrain where there is limited road and sea ferry infrastructure to provide essential services and supplies. In many cases, the only access they have is by air, provided by operators landing at small and often dangerous airstrips.

It cannot be said the pandemic is rampant in PNG. At press time, 833 cases and nine deaths had been reported, but as remote as they are, small communities in the country's West New Britain and New Ireland have not been immune to COVID-19 and this is where local airline, PNG Air, has proved to be an invaluable ally in PNG's fight against the virus outbreak.

The airline has seven Pratt & Whitney powered ATR 72-600s and seven Pratt & Whitney powered De Havilland Canada Dash 8-100s. One of the Dash 8-100s has been converted to a dedicated freighter that transports medical supplies, building materials and perishable goods to communities isolated in mountainous terrain.

"We have been transporting personal protective equipment (PPE), medicine, test kits and pathology samples throughout the country," PNG Air general manager MRO, William Kalipa, said.

"We also have ferried defense force personnel who are helping to prevent the spread of the virus at our borders with Indonesia, Solomon Islands and Australia. This is important because PNG has numerous traditional border crossings."

Kalipa said the government had called in the airline to help because air travel is the only practical way to access remote PNG settlements. It is the only scheduled airline that flies to the southeastern islands of Misima and Kiriwina. Also, many of the airports it serves are unpaved requiring its ATRs and Dash 8s to be equipped with 3M aircraft belly protectors. Some of the airports, including those on the islands of islands of Lihir, Misima and Kiriwina, require the Dash 8-100 because of its shorter takeoff and landing capability.

"The Pratt & Whitney Canada PW120 on the Dash 8 and the PW127 on the ATR have great dispatch reliability. They have been easy to maintain and also to manage because they are a 'series engine'," Kalipa said. "Our engineers' licenses cover both the PW127 and PW120." He added PNG Air uses the engine data for predictive maintenance. "We download the data for engine condition trend monitoring."

PNG Air is continuing to receive requests from local governments to fly to more airstrips in remote PNG, which the carrier is considering. Risk assessments must be done on these runways. The airline relies on the authorities to develop and maintain them so its aircraft can land safely. ■

PEOPLE

AerCap announces Peter Anderson as successor to Philip Scruggs as chief commercial officer

New AerCap Holdings chief commercial officer (CCO), Peter Anderson, who has succeeded **Philip Scruggs** as the lessor's chief commercial officer, has several years of Asia-Pacific experience under his belt from time spent at ILFC, and then as head of Asia-Pacific during AerCap's acquisition of the Los Angeles-headquartered rival in 2014.

After 26 years at AerCap, culminating in the top roles of president and CCO of the New York-listed lessor, Scruggs will retire in March. At AerCap he managed a fleet of more than 1,000 aircraft, generating revenue of more than US$4 billion a year, and led the acquisition of above US$27 billion for new Airbus, Boeing and Embraer airliners. ■

Veteran of sustainable aviation joins U.S. Department of Transportation in new era of climate change policy

Lawyer **Annie Petsonk**, a tireless and exceptional advocate for the aviation industry's sustainable goals, is a new executive member of the U.S. Department of Transportation (DoT) following her appointment by President Joe Biden.

A regular and highly regarded member of aviation and environment panel discussions around the world, Petsonk's new position is principal deputy assistant secretary for aviation and international affairs.

Until her DoT appointment, Petsonk worked for **Environmental Defence Fund (EDF)**, based in Washington DC where she spent 25 years developing and promoting international climate change policy with a long-time emphasis on the climate impacts of international aviation.

"At EDF, Annie led our work on international aviation that included the adoption of a global airline cap on climate emissions from international flights, our push for stronger aircraft pollution limits and the wider use of sustainable aviation fuels," **EDF president, Fred Krupp**, said. ■

MRO AND COMPONENTS

Satair and Honeywell seal deal for commercial aircraft aftermarket

Airbus's Satair and **Honeywell Aerospace** in the U.S. have signed a multi-year exclusive commercial agreement for mechanical and air thermal components on 320, 330 and 380 airplanes. It includes the A350 on a non-exclusive basis. It is the first joint engagement in the global commercial aviation aftermarket for the two companies.

Satair CEO, Bart Reijnen, said: "Honeywell's range of electronic and electro-pneumatic systems for air and thermal management deliver highly reliable and efficient operations with lower total costs of ownership for aircraft operators."

"Honeywell's appointment of Satair is an expansion of our existing strong relationship. Already, we have two agreements with Satair: a distribution agreement for the ADBS –Out Upgrade Pilot Program and a non-exclusive global distributor agreement for Honeywell's JetWave satellite communications products," **Honeywell Aerospace vice president EMEAI, Anthony Florian**, said.

Satair, a 100% Airbus subsidiary, supports the complete life cycle of an aircraft. It has more than 1,100 employees at 10 sites worldwide. ■

COMMUNICATIONS & TECHNOLOGY

SITA launches secure health app for air travellers

Information Technology provider for the air transport industry, **SITA**, is trialling **Health Protect**, a technology solution to safely share vaccination and health information between passengers, airports, airlines and governments.

Small sample initial Health Protect trials have been conducted in the United Arab Emirates and SEA Milan Airports.

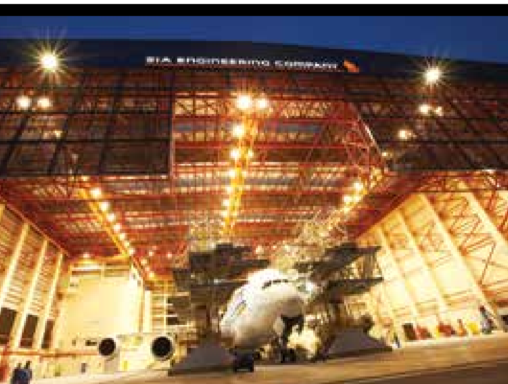
SITA also is working with the Australian government, airlines and airports to implement strong border controls demanded by the country's aggressive prevention against COVID-19 campaign. ■

Travelport strengthens Singapore sales team as recovery hopes rise

New Singapore-based head of agency sales for the Asia-Pacific for **Travelport**, **Chua Hui Wan**, is no stranger to the technology solutions company.

Chua has returned to Travelport after eight years outside the company at Hotelbeds Group APAC as regional director and CEO of ZUJI. Following confirmation of her appointment, acting head of agency sales Asia-Pacific, **Mark Meehan**, is concentrating on his role as global vice president and managing director global operations of the UK-headquartered Travelport. ■

Orient aviation

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AIRCRAFT LEASING IN THE ASIA-PACIFIC

JUNE-JULY

GLOBAL AIRLINES ADAPT TO THE NEW NORMAL POST COVID-19

AUGUST-SEPTEMBER

ASIA-PACIFIC AIRPORT EXPANSION

ASIA-PACIFIC MRO INDUSTRY REPORT

OCTOBER-NOVEMBER

SUSTAINABLE AVIATION IN THE ASIA-PACIFIC

ASIA-PACIFIC AIRLINES LEADERS DEBATE THE MAJOR ISSUES OF THEIR INDUSTRY

DECEMBER-JANUARY

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ADVERTISING ENQUIRIES TO ORIENT AVIATION MEDIA GROUP SALES DIRECTORS:

The Americas / Canada
RAY BARNES
E-mail: ray@orientaviation.com
T: +1 (434) 770 4108

Europe, the Middle East & the Asia-Pacific
DEFNE ALPAY
E-mail: defne@orientaviation.com
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