

## Travel Catering Research Centre Quarterly Report

## Asia

## April - June 2006 Forecast



## Passenger Numbers by Route (millions)

	Jan-Mar '06	Jan-Mar '05	% change	Apr-Jun '05	Forecast
Domestic	16.23	16.83	-3.53%	16.63	16.09
Intercontinental	20.69	20.07	3.09%	19.59	20.19
Total	36.92	36.89	0.07%	36.22	36.25

Overall the passenger number of Domestic markets in the first and second quarter of 2006 show slightly decline compared to the corresponding period of last year. However, the International markets have continued growth of over 3% compared to the pervious quarter.

## Passenger Numbers by Seat Class (millions)

	Jan-Mar '06	Jan-Mar '05	% change	Apr-Jun '05	Forecast
First	2.41	2.42	-0.55%	2.37	2.34
Business	3.97	3.92	1.44%	3.83	3.89
Coach	30.54	30.55	-0.66%	30.02	30.01

The passenger number of First and business do not show a significant change compared to the same period of last year. Asia seems to be concentrating on the business rather than the business class; it might due to the most of airlines reduce the number of first class seats to enhance the service.

## Estimated Complimentary Meal Numbers by Route (millions)

	Jan-Mar '06	Jan-Mar '05	% change	Apr-Jun '05	Forecast
Domestic	8.12	8.41	-3.53%	8.32	8.02
Intercontinental	31.03	30.10	3.09%	29.38	30.29
Total	39.15	38.51	1.64%	37.10	38.32

Meal numbers reflect trends in passenger numbers. Compared to the previous quarter domestic market shows a slight decline, greater than intercontinental.

## Passenger Numbers by Carrier (millions)

	Jan-Mar '06	Jan-Mar '05	% change	Apr-Jun '05	Forecast
Cathay Pacific	4.02	3.63	10.77%	3.71	4.10
Japan Airlines	13.99	14.60	-4.19%	13.93	13.35
Malaysia Air	4.06	4.36	-6.93%	4.50	4.19
Qantas	5.90	6.08	-2.81%	5.87	5.70
Singapore Airways	4.27	3.89	9.69%	4.02	4.40
Thai Air	4.68	4.34	7.93%	4.20	4.54

Cathay Pacific, Singapore Airways and Thai Air show have continued to show slight growth in this quarter compared to the same period last year. While Malaysia Air Airlines has significant declined over 6% compare to the previous quarter.

## Travel Catering Research Centre Quarterly Report Headlines

### **EVA Air**

EVA Air has improved the convenience of the online service option that enables its passengers to order meals in advance of their flights. Not only can they now order 21 days in advance instead of the previous 14, but passengers can also choose from a mouth-watering array of brand-new menu items that include healthy choices. EVA's Super First, Business and Premium Laurel passengers can click on the airline's web site at [www.evaair.com](http://www.evaair.com) and choose from among the special main courses offered for flights corresponding to their bookings as late as 24 hours before the scheduled departure. The extended service became available on 30 March, 2006.

EVA's online menus give passengers more choices and ensure that they get what they want to eat. It also reduces the number of extra meals the airline needs to carry to satisfy passengers' preferences from among the main courses offered on the inflight menus.

To pre-select meals, ticketed passengers simply go to the EVA Air home page and click on the Meal Order option shown at the top. Additional choices available on flights worldwide are featured in the "Exclusive Meals" area.

<http://www.apn.btbtravel.com> Apr/11/2006

### **China Airlines**

China Airlines inaugurated the only Taiwan-Middle East passenger route in the market, launching a Taipei-Abu Dhabi-Vienna passenger service on April 25. An Airbus A330-300 aircraft is used for the new Taipei-Abu Dhabi-Vienna passenger service, with three flights per week. Flight CI 063 departs every Tuesday, Thursday and Saturday. Return flight CI 064 will leave Vienna every Wednesday, Friday and Sunday.

In order to welcome the summer peak season, China Airlines will provide three passenger services to Japan. These include resuming Taipei-Osaka, inaugurating Taipei-Sapporo on July 1, and Kaohsiung-Nagoya on July 2. The Taipei-Osaka route, with five flights per week, will use an A330-300 passenger jet. The Taipei-Sapporo route, with six weekly flights, and the Kaohsiung-Nagoya route, with two weekly flights, will both use B737-800 aircraft. In the future, passengers traveling to west, north and central Japan will enjoy greater flexibility and convenience. After launching these three new services, China Airlines will provide 70 scheduled flights each week, and offer the most scheduled destinations between Taiwan and Japan than any other airline.

<http://www.apn.btbtravel.com> Apr/ 25/2006

### **Malaysia Airlines**

Malaysia Airlines will restructure its domestic operations through 19 trunk routes. Each of these routes currently generate an annual average load of 15 000 international connecting passengers, and/or 13 000 front-end (Business/First Class) passengers. Applying these two dimensions, Malaysia Airlines will now operate seven routes between KL International Airport (KLIA) and Peninsular Malaysia cities, six routes between KLIA and Sabah/Sarawak, and six routes within Sabah and Sarawak. The government's vision is to establish two national champions in the international aviation sector - one in full service and the other in low cost

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### Tiger Airways

Tiger Airways, Singapore's low fare airline, launches its inaugural flight to Shenzhen on 27 April 2006. This followed its first flights to Guangzhou and Haikou on 25 April and 26 April 2006, respectively. The Shenzhen Baoan International Airport serves China's most developed area located in the Pearl River Delta.

"Tiger Airways will be the only low fares carrier flying to China from Singapore and we expect enthusiastic demand from savvy travelers for this service. The launch of Tiger Airways' Singapore-China flights are expected to give the tourism and hospitality industry of the two countries a shot in the arm and reinforce Singapore's position as a regional hub to Southeast Asia and Australia. It will also raise the profile of Tiger Airways as a safe and reliable Singapore-based low fares carrier in the huge Chinese market.

Tiger Airways is Singapore's largest and most popular low fare airline, serving 13 cities in seven countries (Singapore, Thailand, Vietnam, Macau SAR, the Philippines, Australia and Indonesia). Tiger Airways will serve 16 destinations with the addition of the Chinese cities of GuangZhou, Haikou and Shenzhen.

<http://www.apn.btctravel.com> Apr/ 27/2006

## Travel Catering Research Centre Quarterly Report

### **Explanations**

#### **Passenger Numbers by Route**

*The data in this table is derived from the area's major individual carrier's websites. These carriers include Cathay Pacific, Japan Airlines, Korean Airlines, Malaysia Air, Qantas, Singapore Airways and Thai Air.*

*% change - This compares the last full quarter of this year with the same quarter in the previous year.*

*Forecast - The forecast is based on the trend derived from the equivalent quarter of the previous year and the percentage change in the last full quarter.*

#### **Passenger Numbers by Seat Class**

*The data in this table is derived from data found on Euromonitor's web pages. The seat class data is defined by country and is then applied to the major carrier for that country. Two countries are not reported on and the average seat class ratio is applied to these.*

#### **Estimated Complimentary Meal Numbers and Type by Route**

*The data in this table is calculated by taking the total passenger numbers by route and applying a multiplier to provide an estimate of the total meals provided to passengers. The multipliers used are based upon consensus meal values agreed upon by a panel of experts and are subject to change on a monthly basis.*

*% change – Please see above.*

*Forecast – Please see above.*

#### **Passenger Numbers by Carrier**

*The data in this table is derived from the individual carrier's websites. The Association of Asia Pacific Airlines (AAPA) data is derived from Monthly International Statistics as found on their website.*

*% change – Please see above.*

*Forecast – Please see above.*