



Where are the Opportunities ?

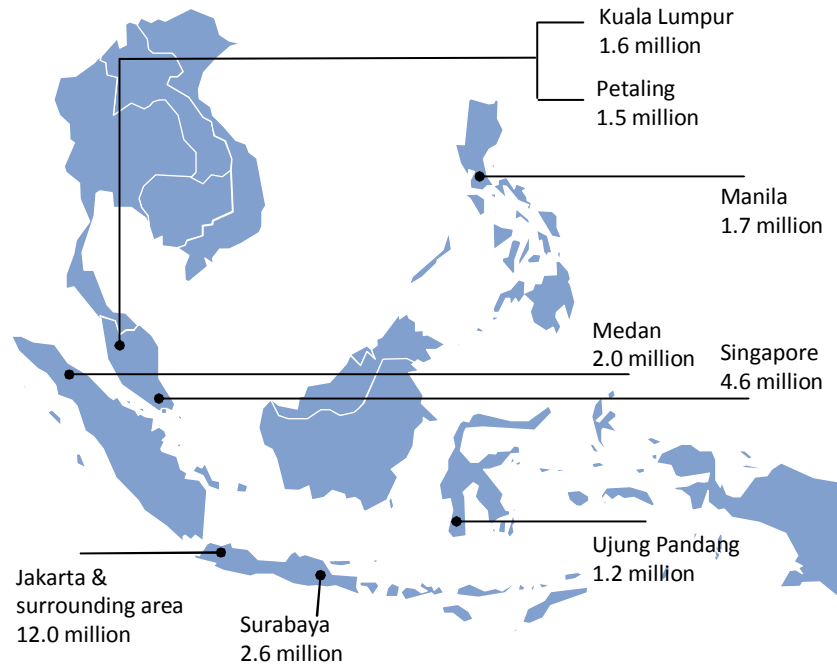
EMIRSYAH SATAR
President & CEO

CEO Plenary Session
European-Indonesia C Development
Jakarta, 29 November 2010

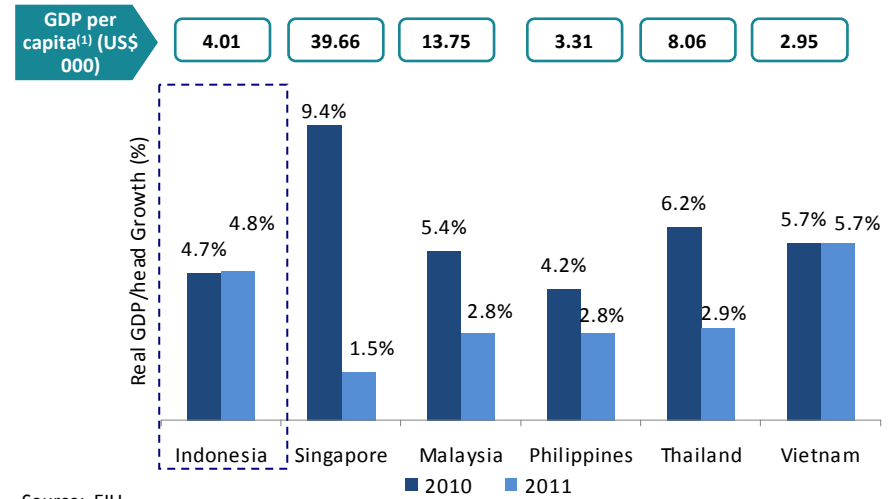
Indonesia : Unique opportunity within Asia

- ✓ Most populous country in the South East Asia (4th largest in the world) with people distributed across a number of medium - large cities and high density provinces
- ✓ Largest archipelago in the world lending greater importance to air travel; potential for taking market-share from land / sea travel
- ✓ High growth economy with GDP per capita showing a growth of 12.5% in the period 2000 – 2009

Most populated cities in the region

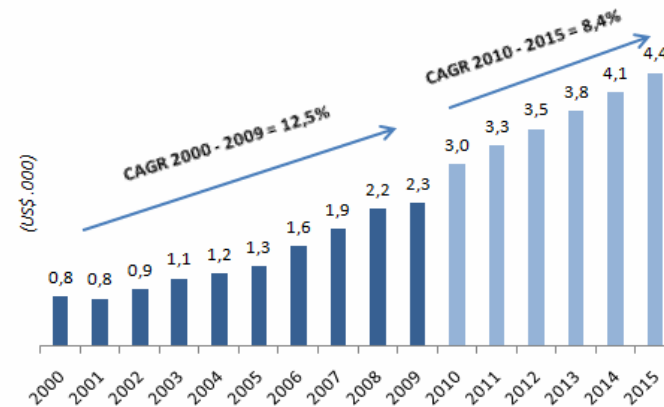


South East Asia GDP Forecasts



Source: EIU

Indonesia: GDP per capita



Source: IMF, World Economic Outlook (WEO), 2010

Airline demand is driven by GDP growth

- ❖ Growth in passenger and freight markets in the past has largely been driven by broader trends in GDP growth and world trade flows. Passenger traffic has grown at around 1.5-2 times the rate of GDP growth.
- ❖ Freight has generally grown at a similar rate to world trade, although in recent years a shift in market share to surface transport has meant that air freight traffic growth has been slower than trade growth.



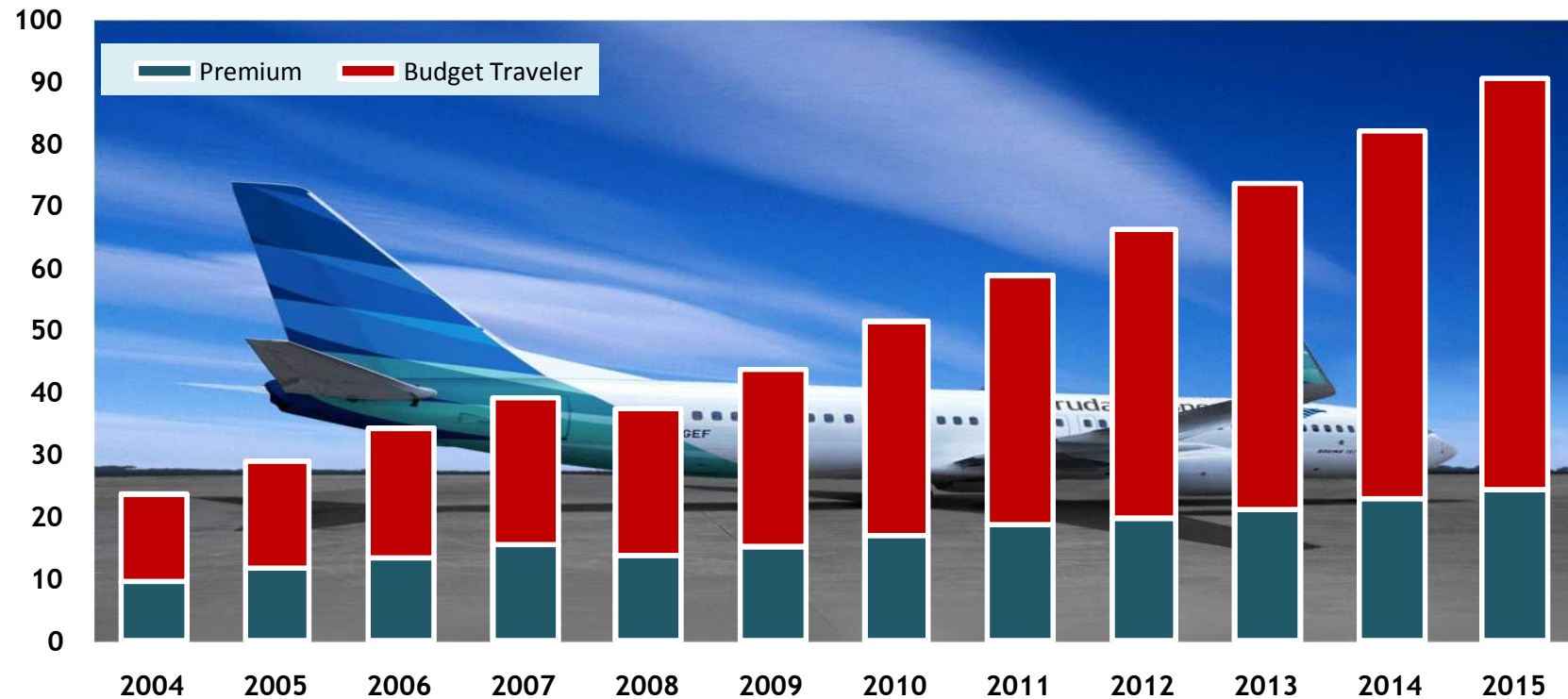
Source: ICAO, IATA, EIU

Aviation Business Chain



Indonesia Traffic Growth of Domestic Market

Market Size (mio)

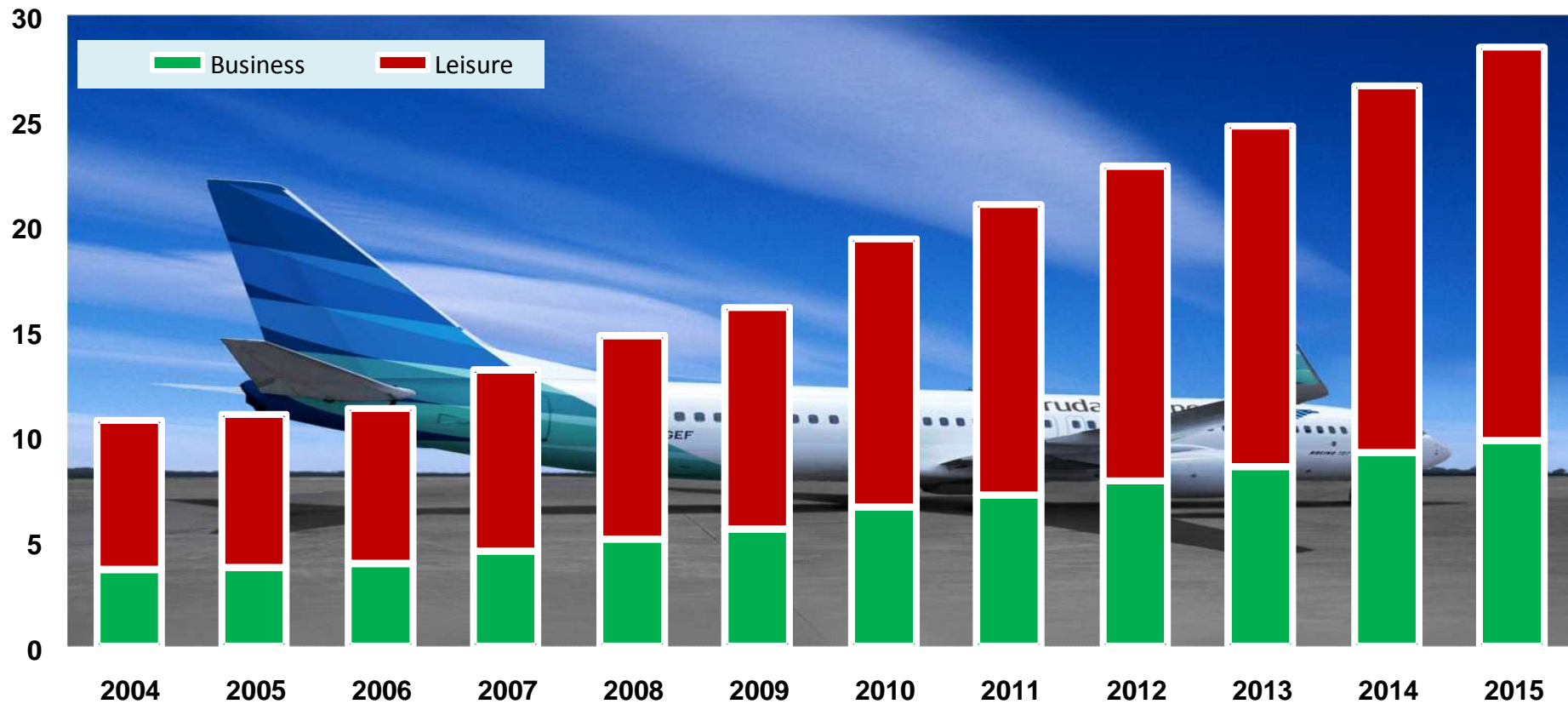


- Domestic market in 2010 increased by 17%. Garuda projects market growth of 12% CAGR (2010 – 2015), the upturn periods.

Note: GA Pax Include Citilink, S-100 seater & Alliance
Sources : Dephub, PT. AP I & II, Garuda Forecast

Indonesia Traffic Growth of International Market

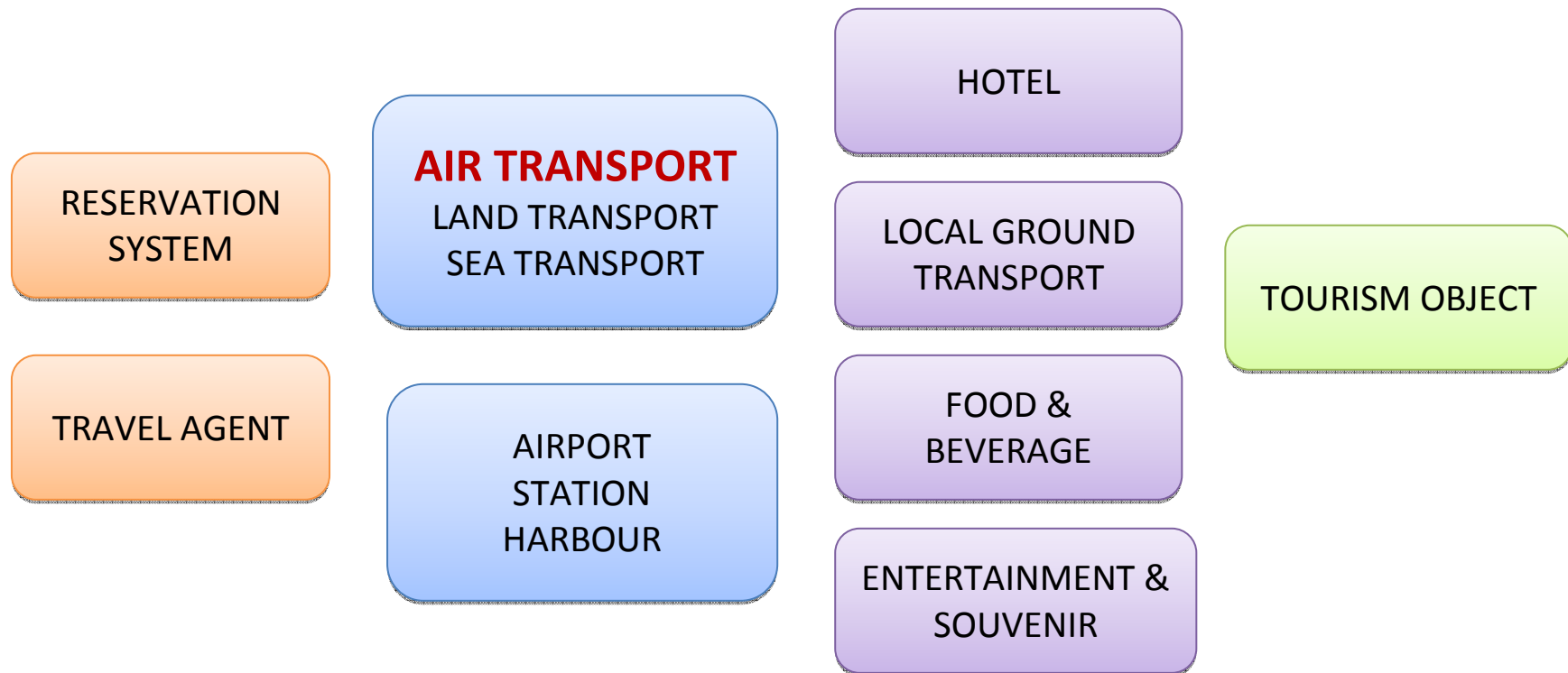
Market Size (mio)



- Traffic growth of International market increased by 20% in 2010. Projected CAGR traffic growth is 8% from 2010 - 2015

Note: GA Pax Include Citilink S-100 seater & Alliance
Sources : IATA, PT. AP, PATA, Garuda Forecast

Tourism Related Business Chain



Figures of Indonesia Tourism

Tourism	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Arrivals	5,002	5,094	5,459	6,231	6,278	6,574	6,931	7,352	7,809	8,307
Outbound	5,423	5,902	6,213	6,168	6,275	6,389	6,513	6,646	6,789	6,942
Domestic	198,359	204,553	222,389	225,042	229,950	241,160	249,527	257,894	266,261	274,628

Air Travel	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Arrivals	2,889	3,058	3,300	3,759	3,804	4,001	4,239	4,517	4,822	5,155
Outbound	3,415	3,813	4,036	4,158	4,226	4,296	4,371	4,452	4,538	4,629
Domestic	28,992	34,016	39,162	37,465	43,808	51,431	60,585	70,279	80,821	92,136

Source: Euromonitor International, CAPA, Depbudpar

Thank you