



# Benefits PMA Companies Bring to the Airlines Today

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*Director International Sales*

*15th Annual Gorham PMA-DER Conference*

*March 2013*

# *AGENDA*

- Today's Market
- PMA Benefits to Airlines



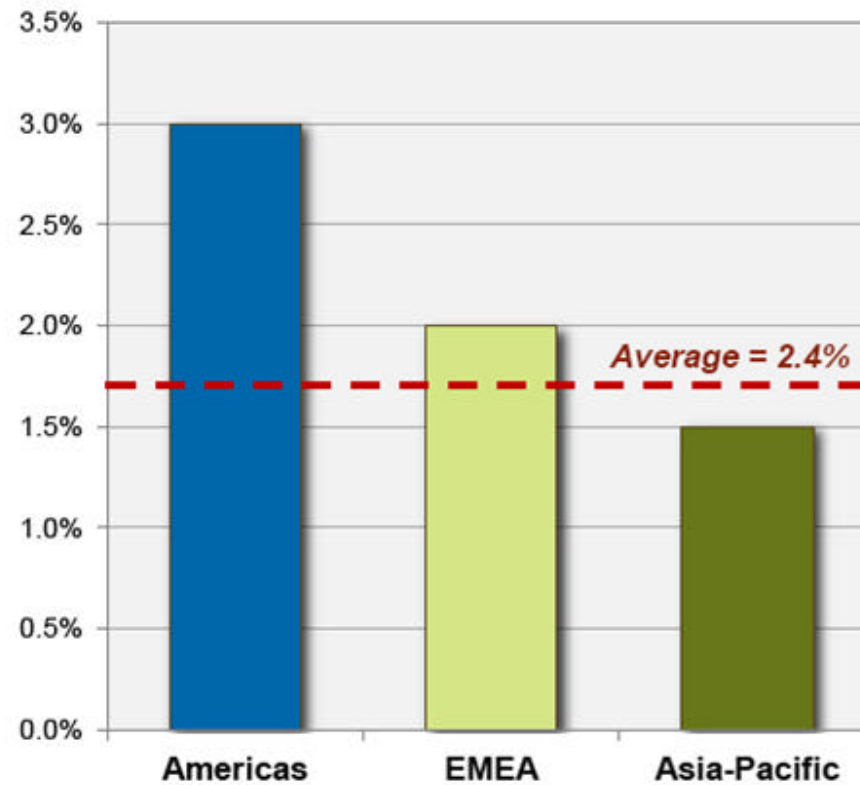
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# *TODAY'S MARKET*

- Market Trends
- Current OEM Behavior
- Airline Business Model Evolving
- Geographical Market Forces

# PMA MARKET TRENDS

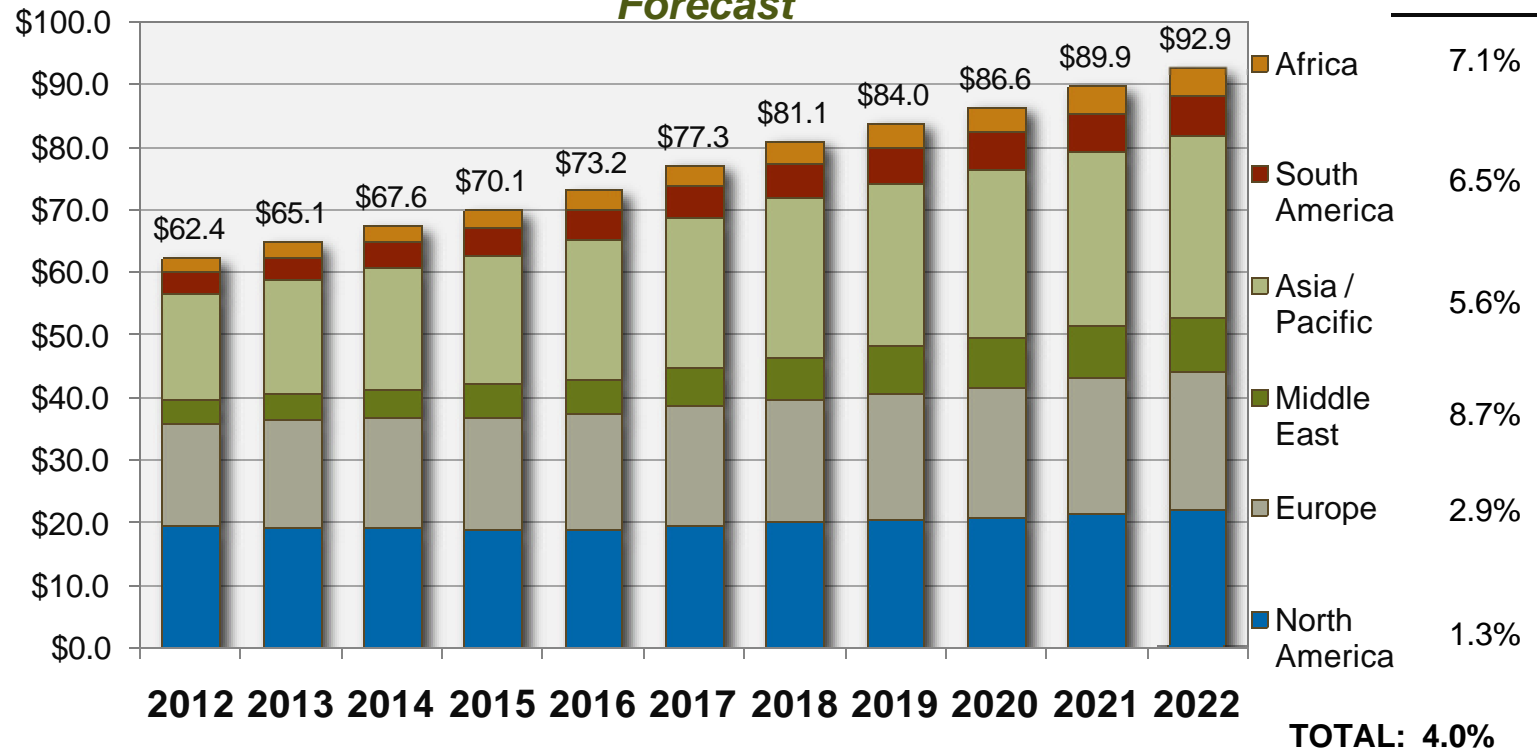
*Air Transport PMA Market Penetration By Region*



Source: ICFI SH&E

# PMA MARKET TRENDS

## 2012 – 2022 Commercial MRO Demand Forecast



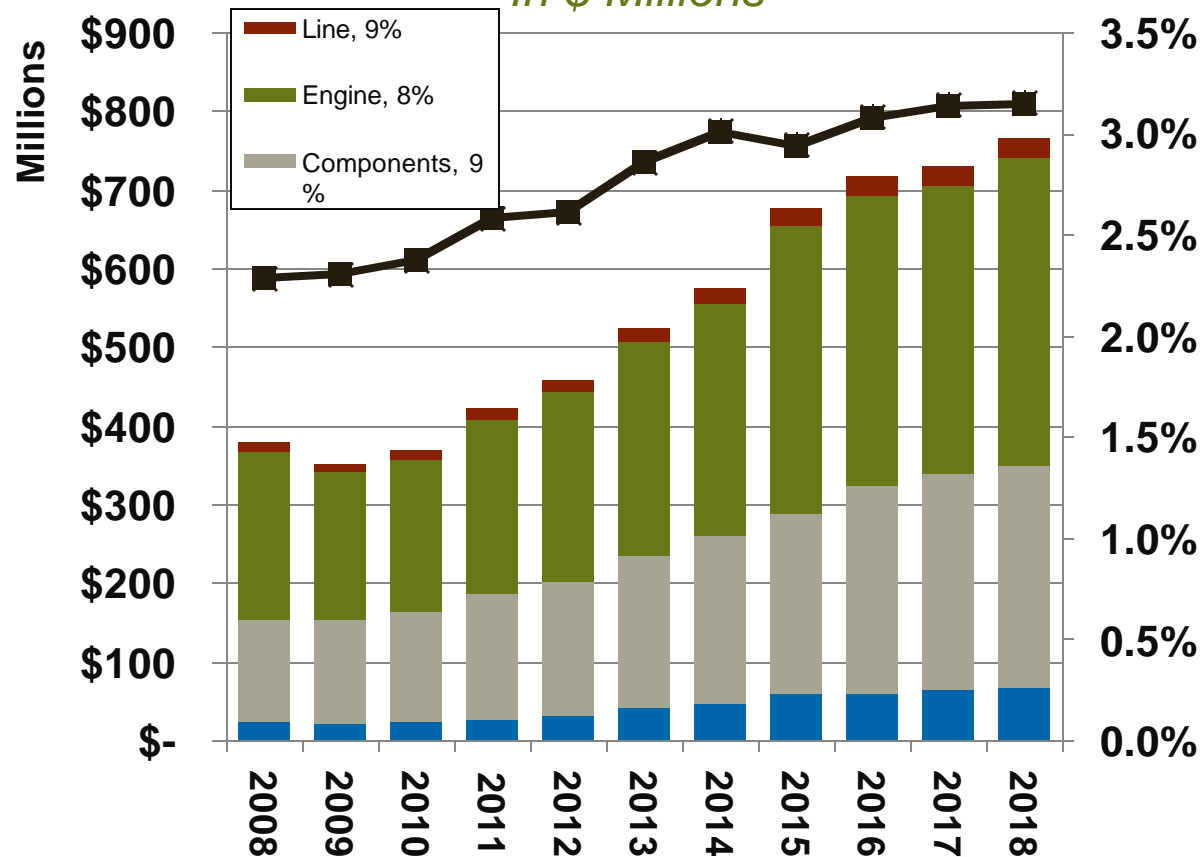
\*includes P2F Conversions and MRO Services: Engineering Services and Maintenance Management and Components Asset Management / Pooling

Highest CAGR in Emerging Markets

**JET PARTS**  
ENGINEERING INC.

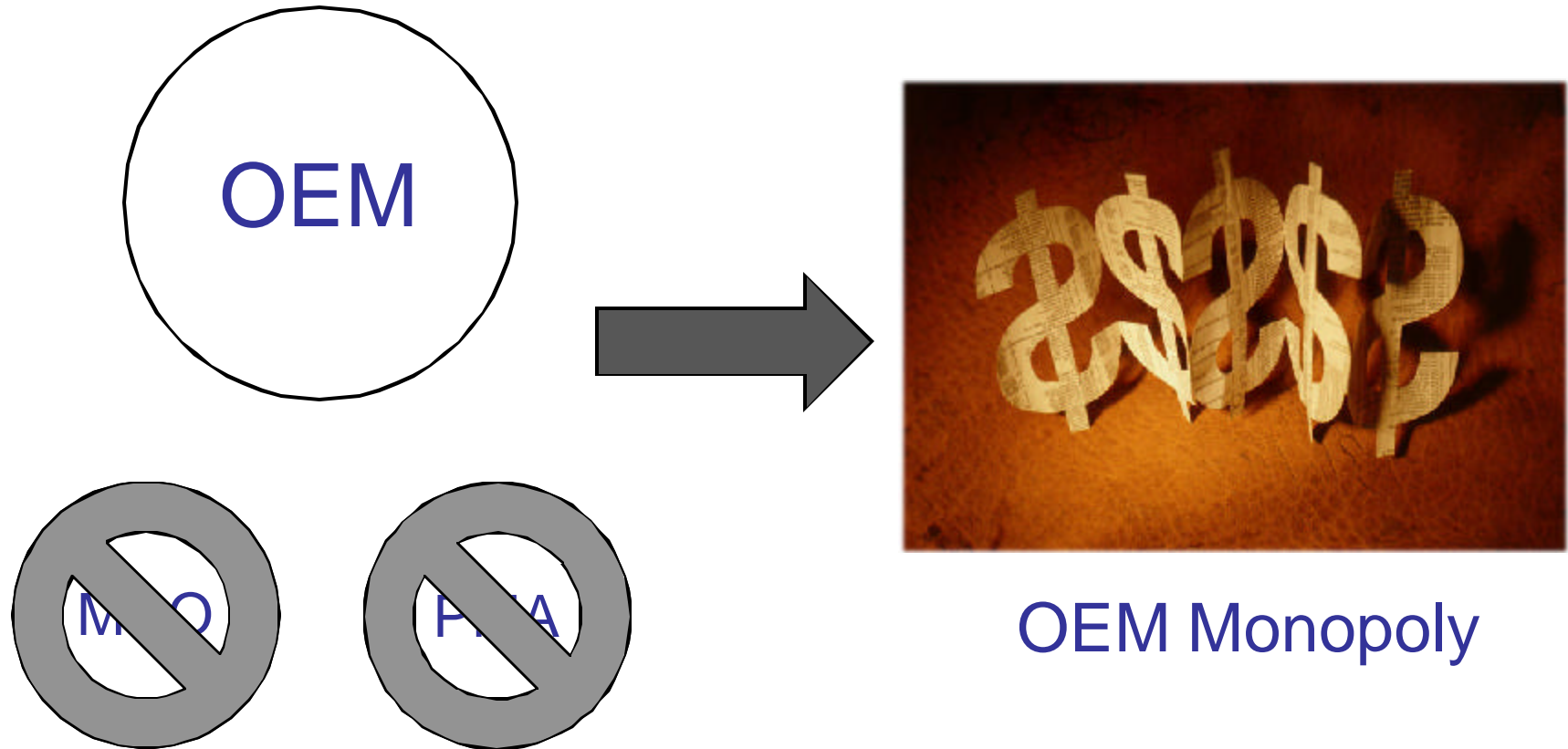
# PMA MARKET TRENDS

## Air Transport PMA Market Forecast In \$ Millions



Source: ICF SH&E analysis

# *CURRENT OEM BEHAVIOR*





# *AIRLINE BUSINESS MODEL*

Traditional Model



Ticket Sales  
Ramp Services  
Maintenance  
Catering  
Freight

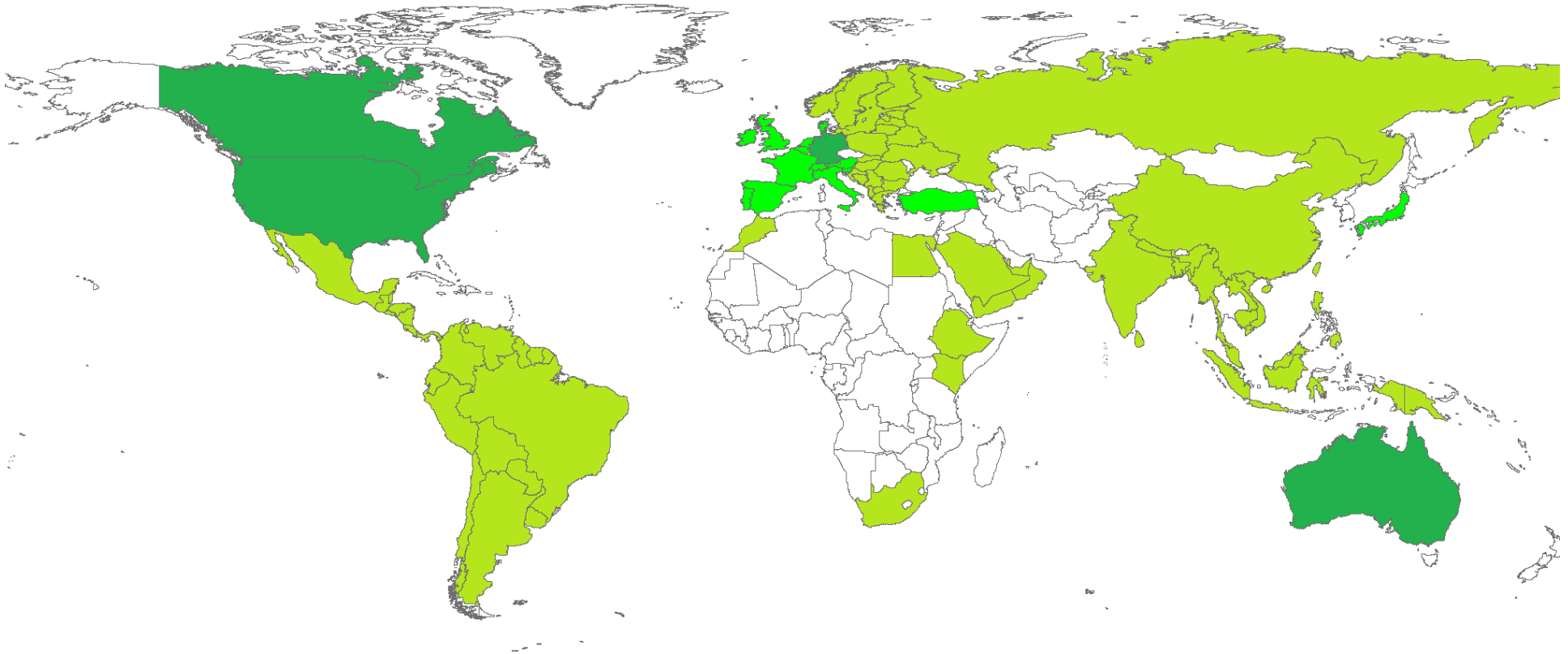
Evolving model



Butts in Seats



# *GEOGRAPHICAL EXPANSION*



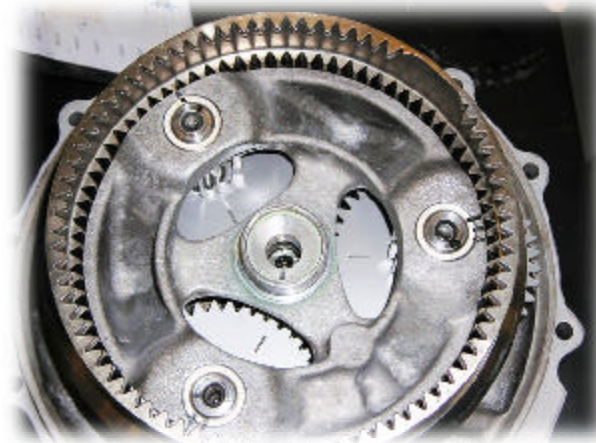
# *AGENDA*

- Today's Market
- PMA Benefits to Airlines



# *PMA BENEFITS TO AIRLINES*

- Constantly Evolving Market
- Working Together

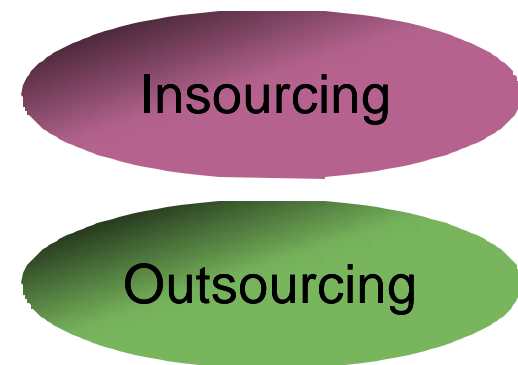
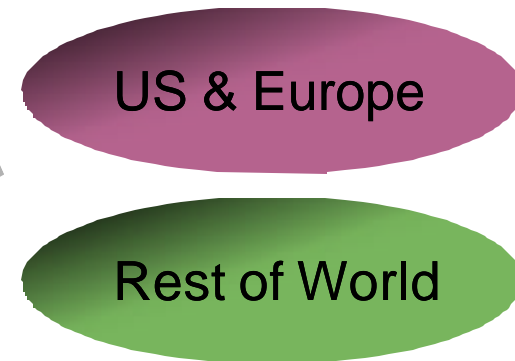


# *EVOLVING MARKETPLACE*

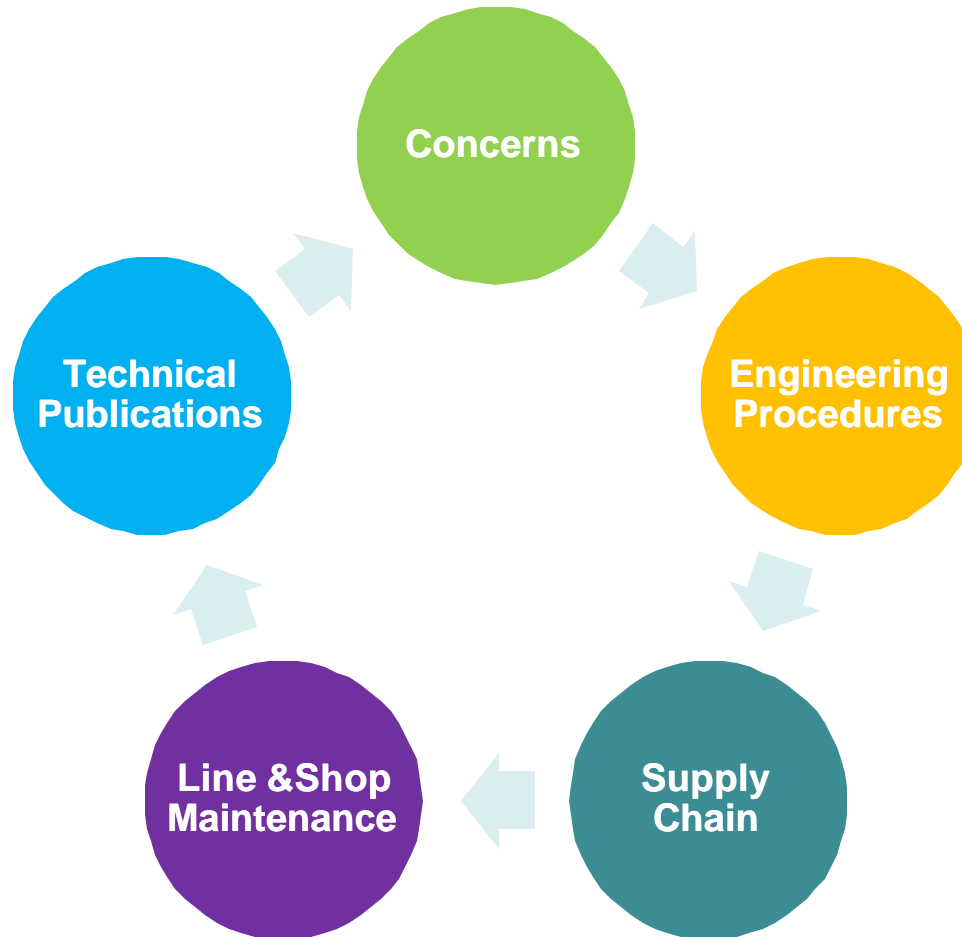
## Yesterday



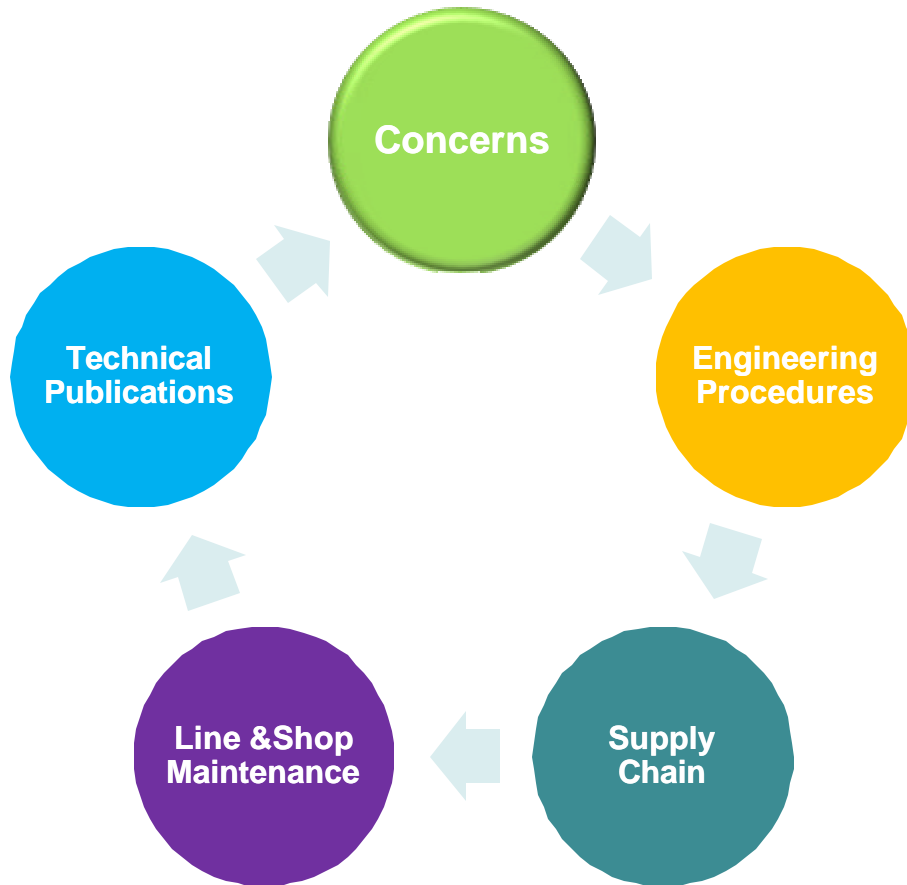
## Tomorrow



# *WORKING TOGETHER - INSOURCING*

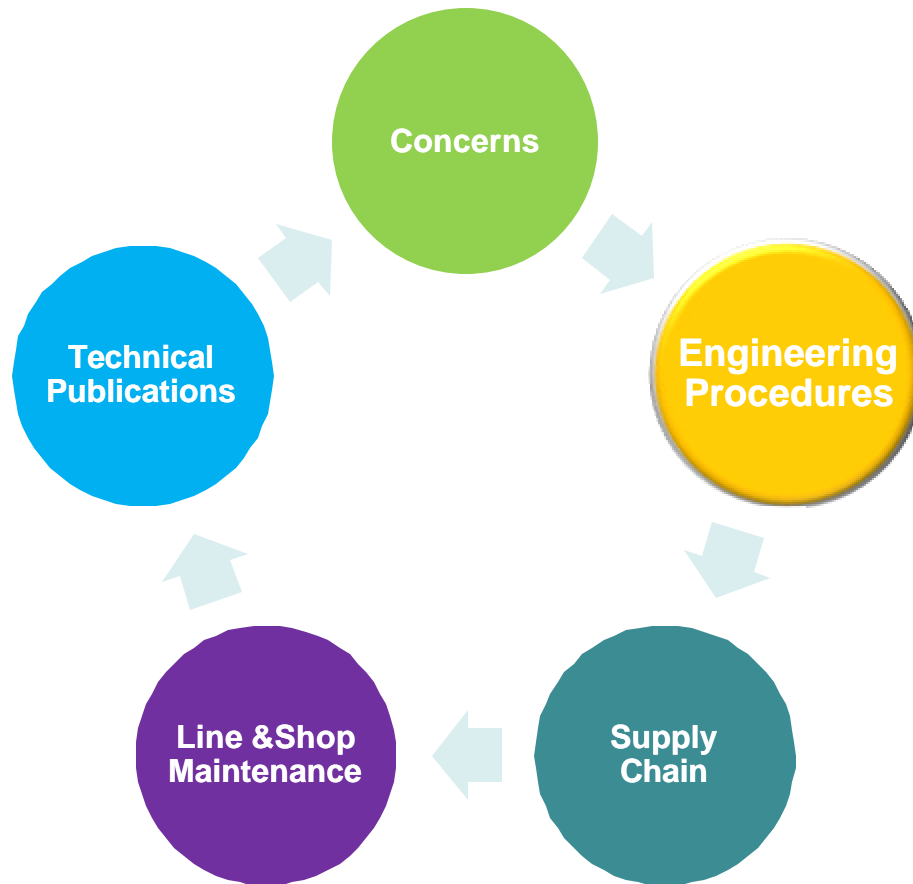


# WORKING TOGETHER - INSOURCING



- Liability Of Defective Parts
- Warranty
- Configuration Control
- Aviation Authorities Coordination
- ICAs
- TCH/OEM Claims

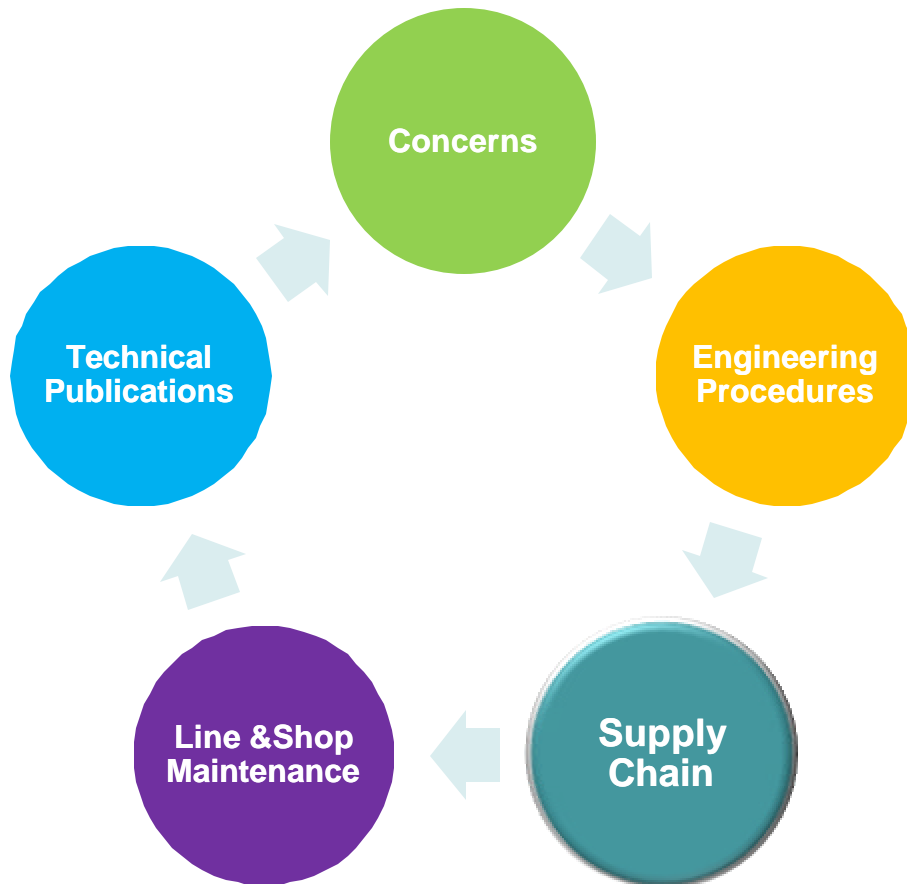
# WORKING TOGETHER - INSOURCING



➤ Airworthiness Determination

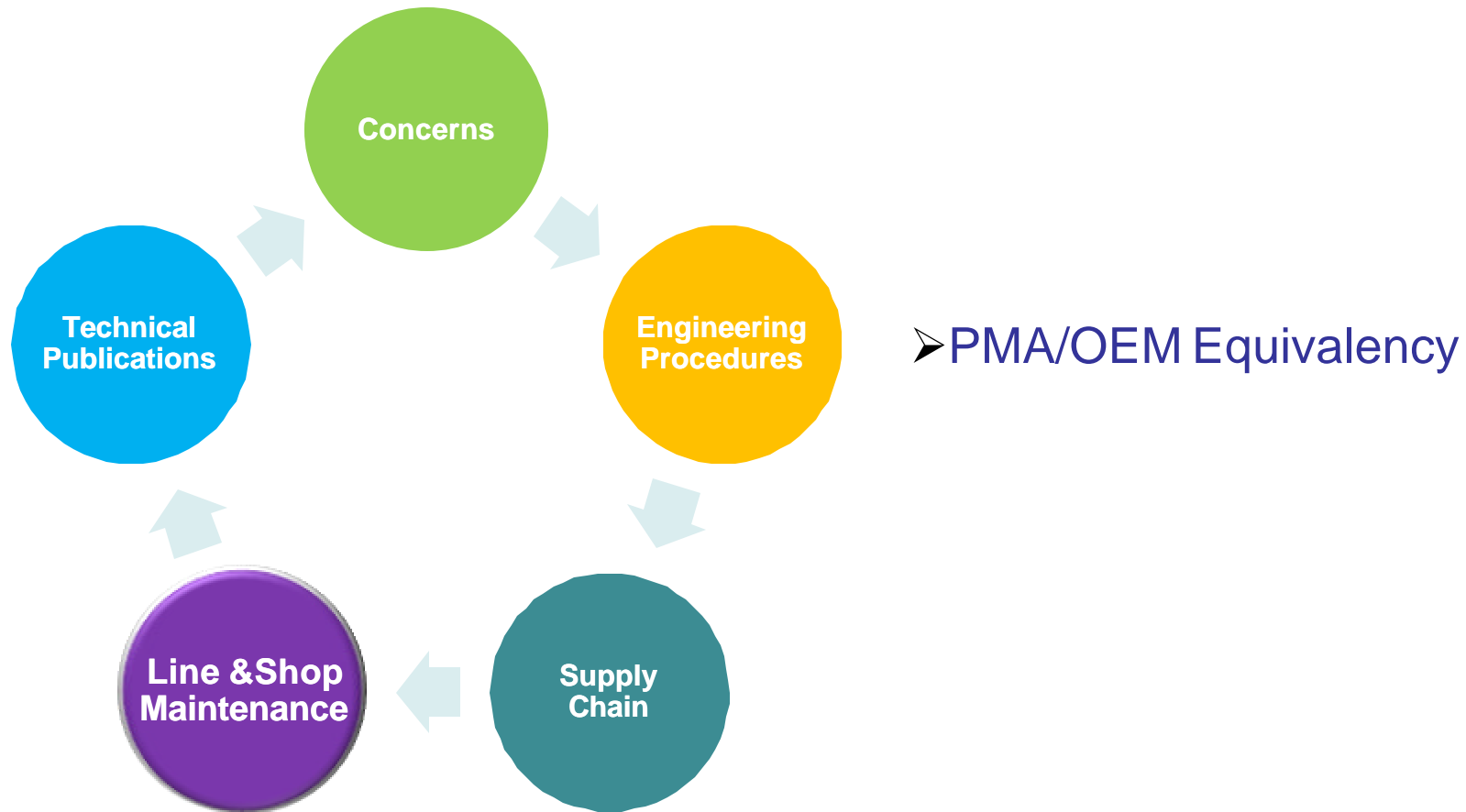


# WORKING TOGETHER - INSOURCING

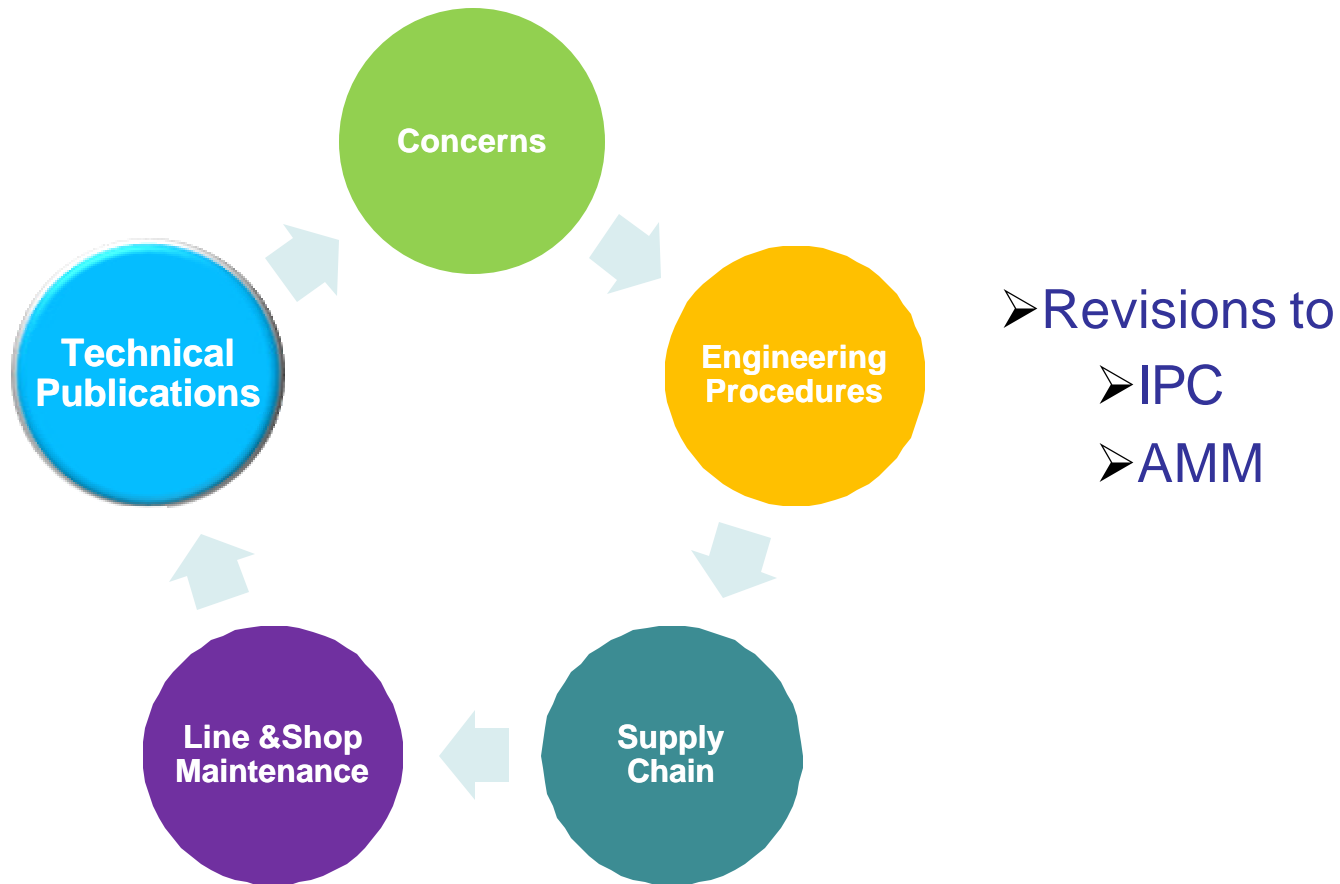


- Awareness of MRO Capabilities
- IT
- Information Exchange

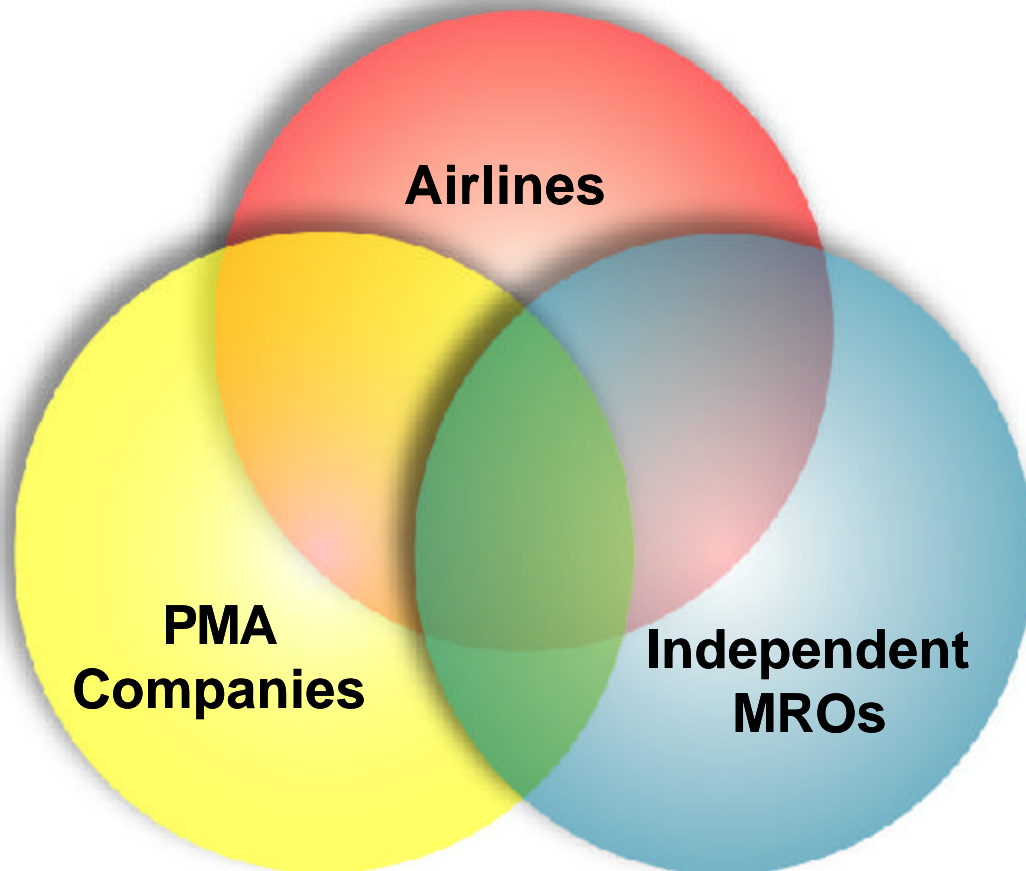
# *WORKING TOGETHER - INSOURCING*



# WORKING TOGETHER - INSOURCING



# WORKING TOGETHER - OUTSOURCING



- Outsourced Assemblies
- Material Cost Drivers
- Target Parts
- Approval & Ordering

# *WORKING TOGETHER - OTHER*



New PMA Development



In Service Support

SUPPORT AT ALL STAGES

# *ADDRESSING CHALLENGES*



Freedom from Monopoly

Leasing Companies Buy In

ICA Limitations

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# CONCLUSION

- PMA industry resources available
  - Traditional PMA users
  - Evolving business model operators
  - Operators expanded regions
- Please use our resources



“To be the **best** PMA  
provider at each of the  
**customers** we support”