

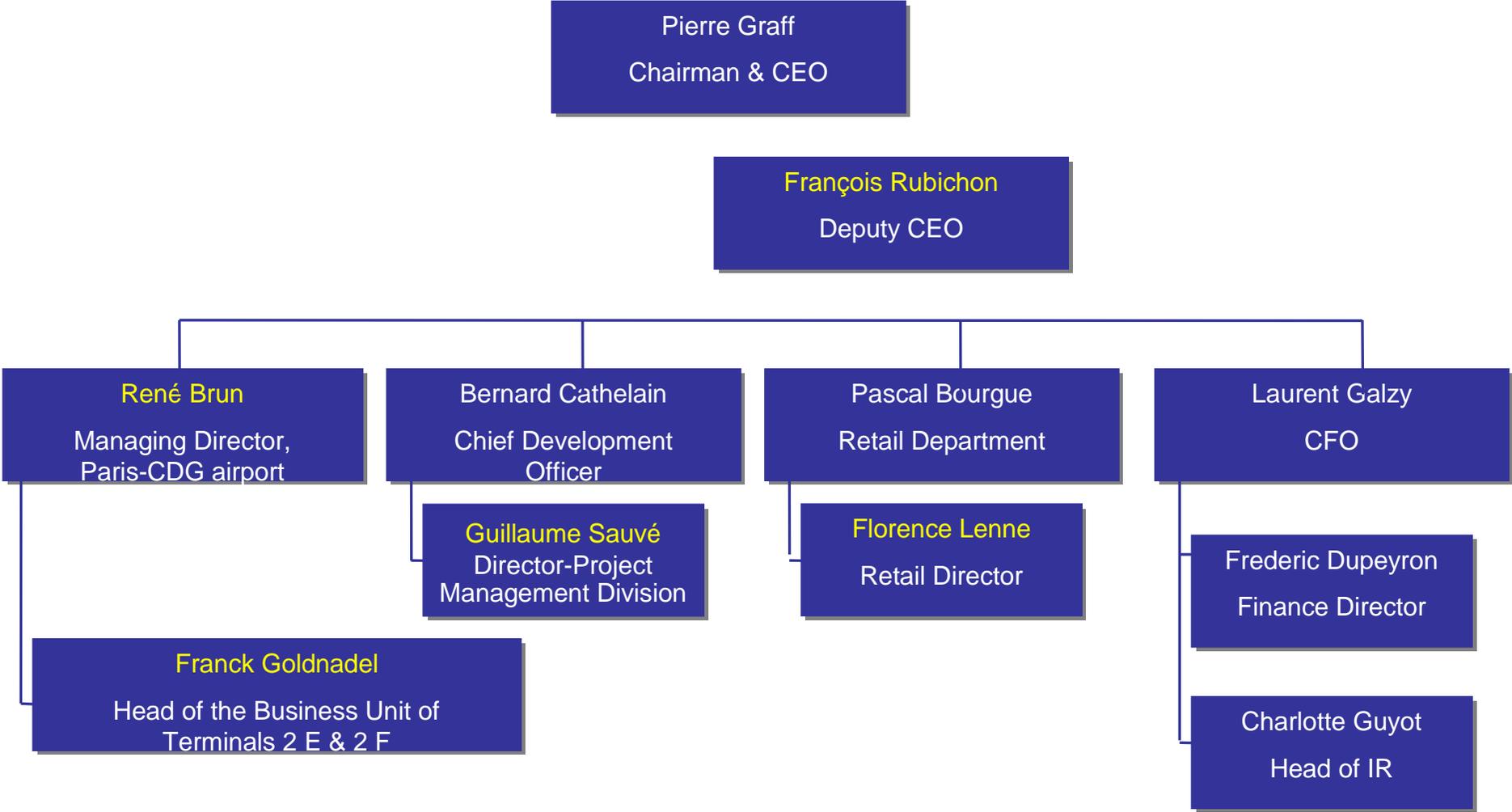
## Visit to the new Paris-Charles de Gaulle airport

*June 10, 2008*



**AÉROPORTS DE PARIS**

# The Paris-Charles de Gaulle airport team, with you today



# Traffic growth for the 4 first months of 2008

## New routes / New traffic at Paris-Charles de Gaulle

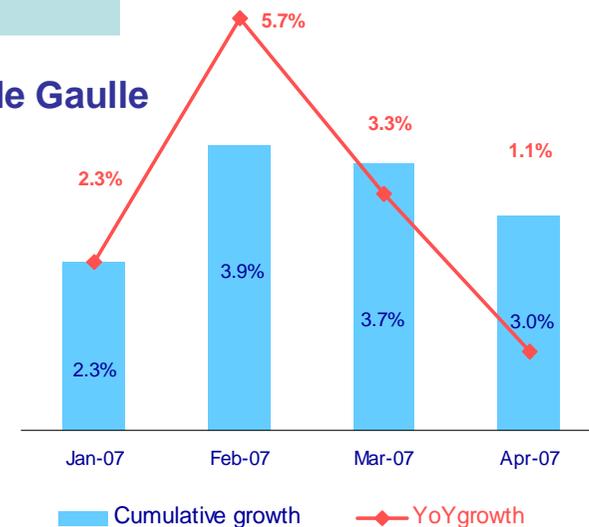
- 3 New flights just opened between Paris-CDG and Minneapolis (Northwest), Cleveland (Continental), and Salt Lake City (Delta)
- Easy Jet opened a new base in Paris-CDG, in February, with substantial margins for expansion

## Passenger traffic growth (in %)

### Aéroports de Paris



### Paris-Charles de Gaulle

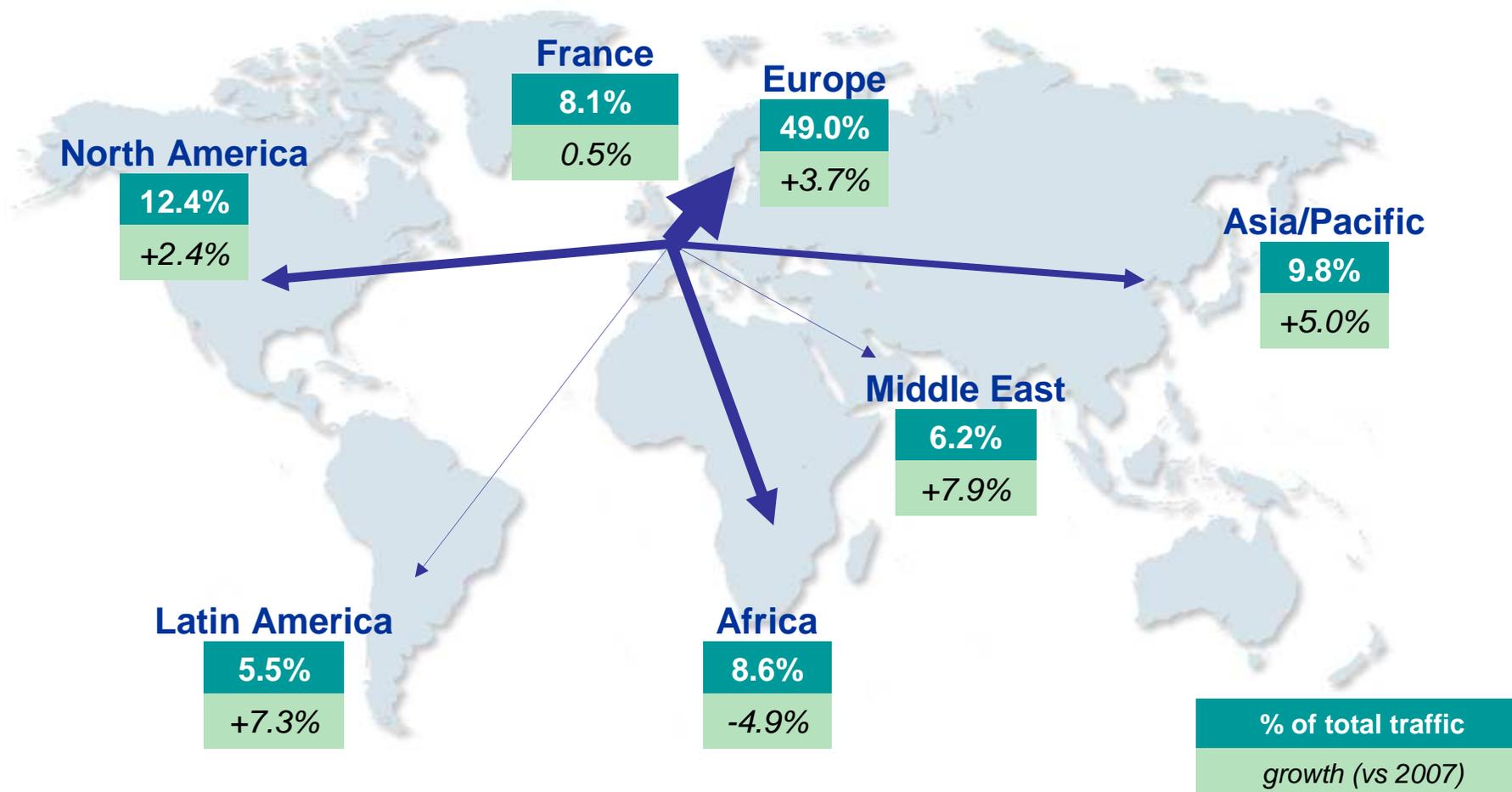


- Passenger traffic increased 2.0% in the 4 first months of 2008 to 27.1 m PAX: +3.0% at Paris-CDG and -0.1% at Paris-Orly
- Number of aircraft movements at CDG: +2.6% to 177,827
- Connecting passengers at CDG: 31.6% of total traffic (32.4% in the same period of 2007)

# International and European traffic drive Paris-Charles de Gaulle's traffic growth in the 4 first months of 2008

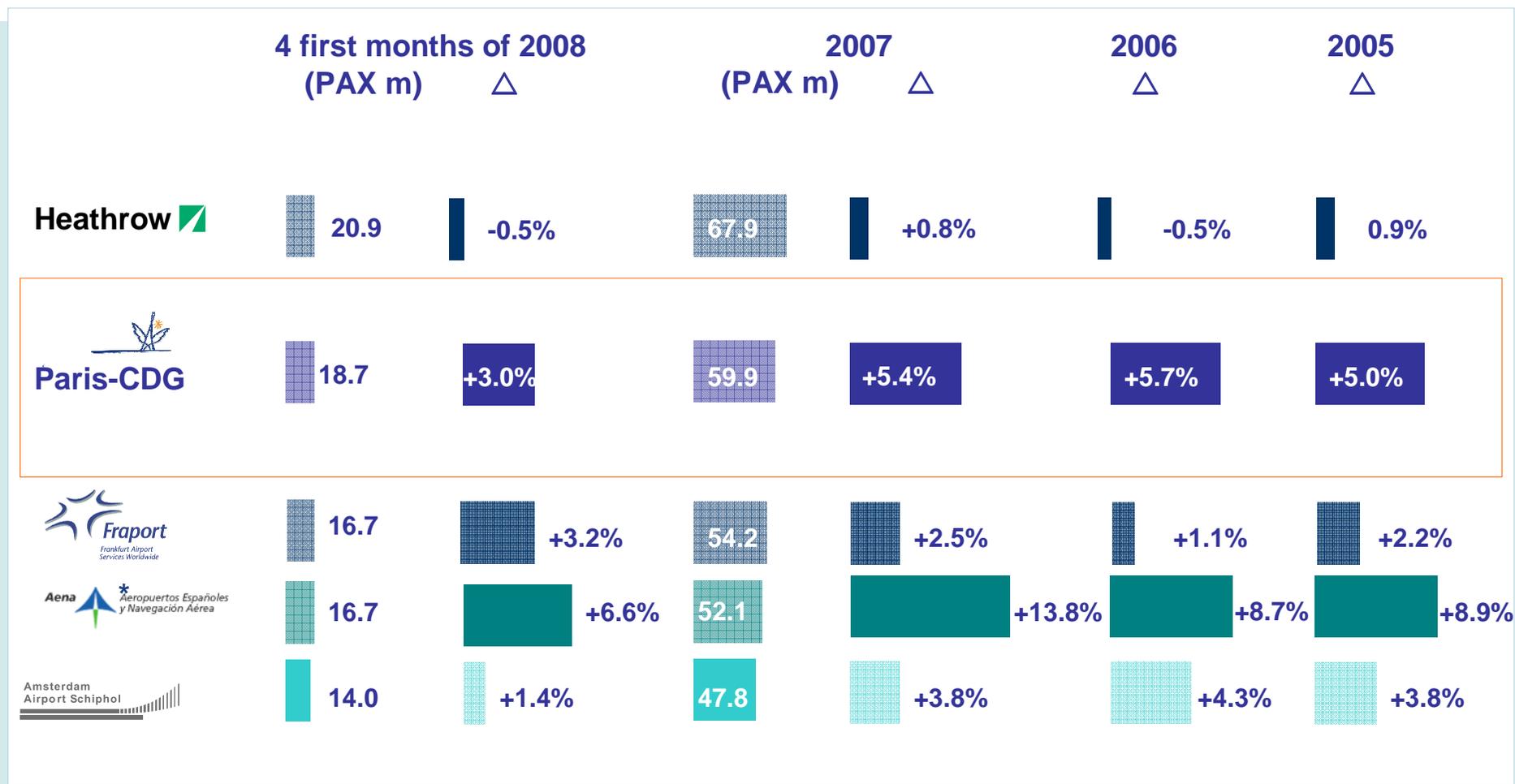
Total traffic: 18.7 m passengers, +3.0%

Excluding France & Europe: 10.7 m passengers, +3.7%



# Paris-Charles de Gaulle is one of the growth leaders in Europe

## Traffic growth at major European airports



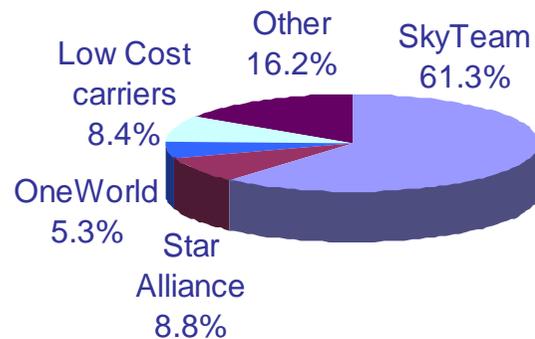
\*Madrid Barajas airport



## Paris-CDG, a leading airport in Europe

# Paris-Charles de Gaulle at a glance

## Strong alliances



## Top 10 Airlines 2007 (M pzx):

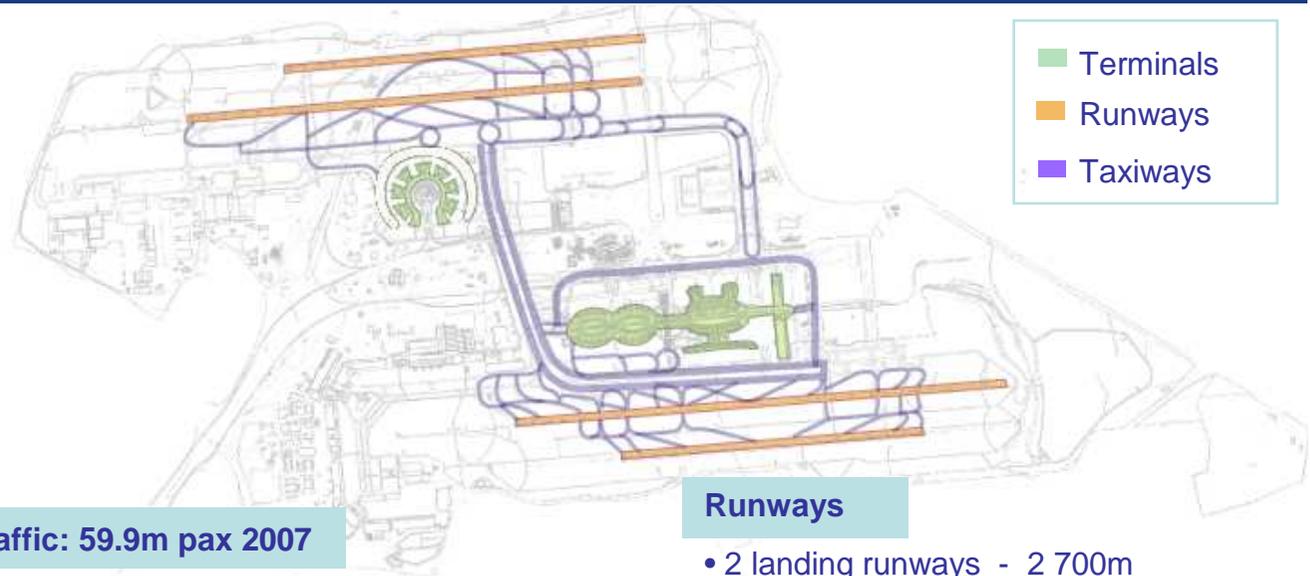
1. Air France	(32,8)
2. Lufthansa	(1,5)
3. EasyJet	(1,4)
4. Vueling Airlines	(1,2)
5. Alitalia	(1,1)
6. British Airways	(1,0)
7. XL Airways	(0,8)
8. American Airlines	(0,7)
9. Air Méditerranée	(0,6)
10. SAS	(0,6)

## Traffic: 59.9m pax 2007

- 164,000 pax/day on average
- 210,000 pax/day on a peak period
- 250,000 bags/day on a peak period
- 543,810 movements
- 2/3 Point to point ; 1/3 connection
- The major Hub for Air France-KLM

## Cargo: 2.3m tons of cargo including mail

- N°1 in Europe
- Cargo terminals: 500 000 sqm of warehouses



## Runways

- 2 landing runways - 2 700m
- 2 take-off runways - 4 200m

## Terminals

- Overall area of terminals 950,000 sqm\*
- 25,000 car park spaces

## Land

- Overall area of land reserves: 3,257 ha
- 136 ha of land available for real-estate development

**Airport Services Revenue\*\*:** €1,335.3m

\* SHON: Gross floor area excluding roofs, terraces, non-closed areas car parks, non-usable areas

\*\* Airport services segment only, excluding real estate, ground handling, and other activities



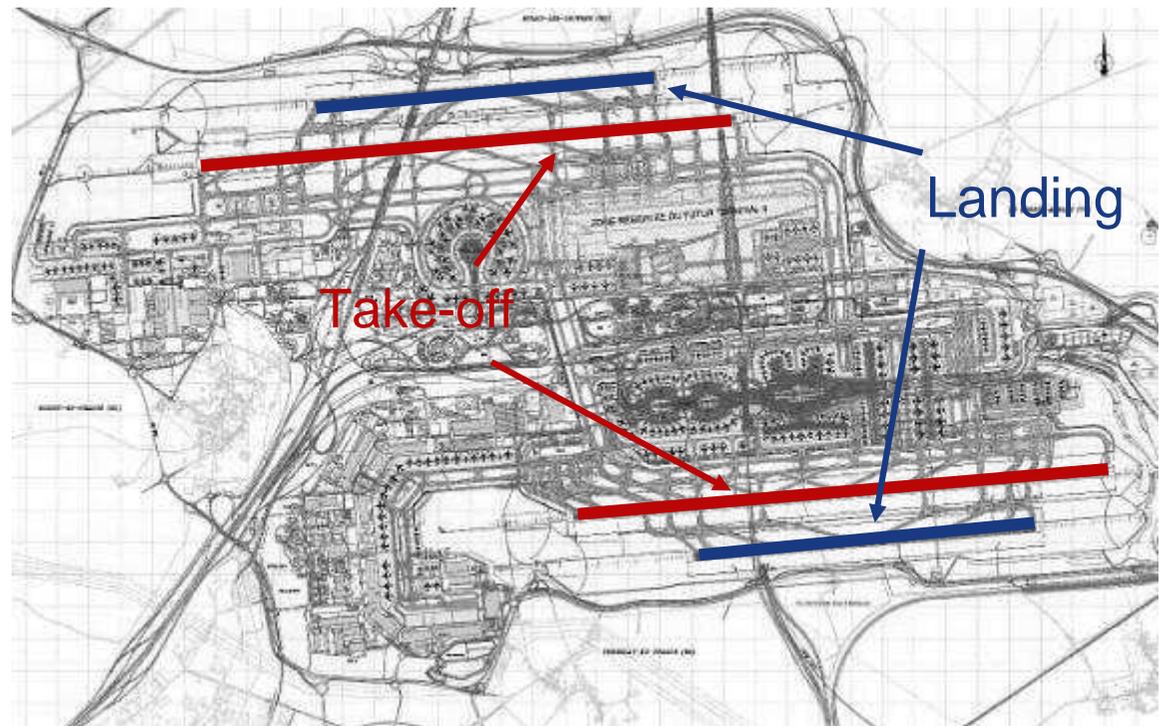
# A Good Location

- Only 22km away from Paris, but clear of urban limits



# The most efficient runway system in Europe

- 4 runways
  - Inner runways for take-offs
  - Outer runways (built 1997-2000 in support of the hub) for landings
- Peak hour capacity of extreme importance for hub competitiveness
  - 112 mvts/ hr current
  - 120 planned
    - With objective  
Aéroports de Paris: 2012



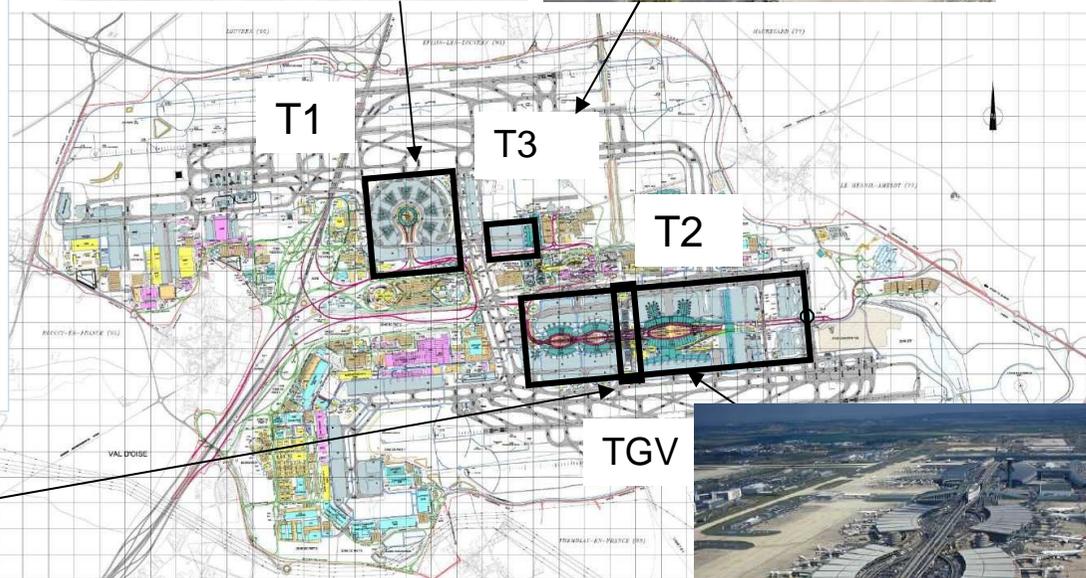
# Terminals adapted to airlines and passengers needs

Overall nominal capacity:

Dec-07 61.6m pax

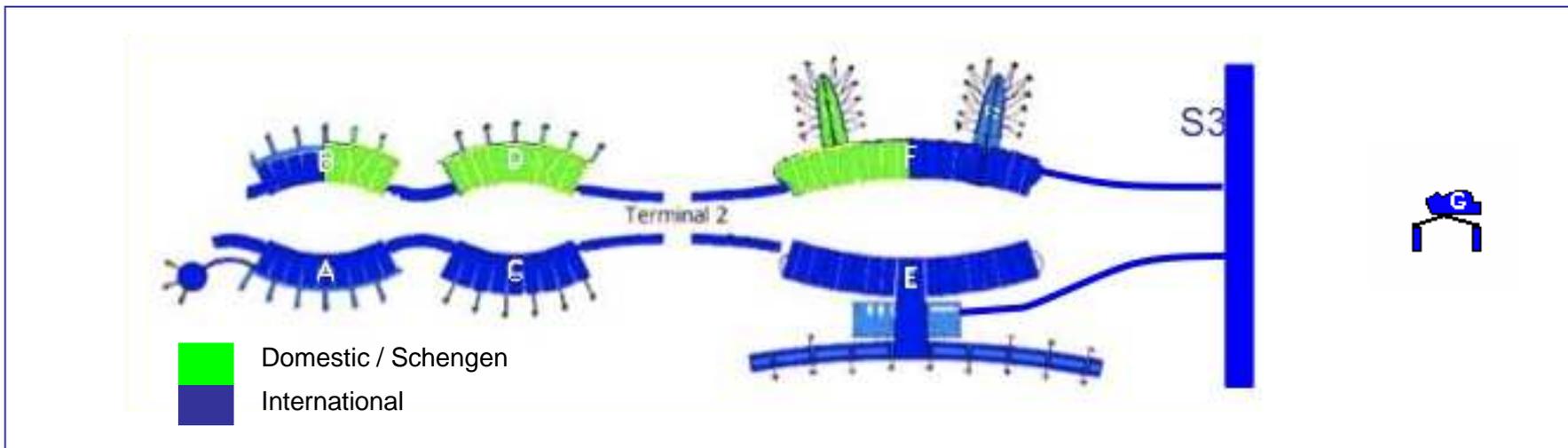
April-08 65.0m pax

- **Passenger terminals**
  - T1 (Star Alliance...)
    - 8.6 Mpax in 2007
  - T2 (Skyteam, One world, Easy Jet...)
    - 45.4 Mpax in 2007
  - T3 (Charters, LCCs)
    - 5.7Mpax in 2007
- **High-speed train station**
  - 3.0Mpax in 2007



# Focus on Terminal 2

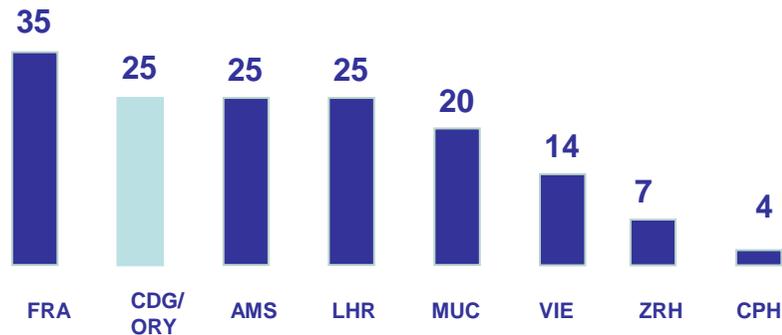
- Terminals 2A and B: OneWorld, Easy Jet...
- Terminals 2 CDEF and S3: the core of SkyTeam's hub



# Why is Paris-Charles de Gaulle a leading airport and hub?

## Catchment area

(millions of inhabitants living within 200 km of the airport)



## Cities within a two-hour flight of Paris



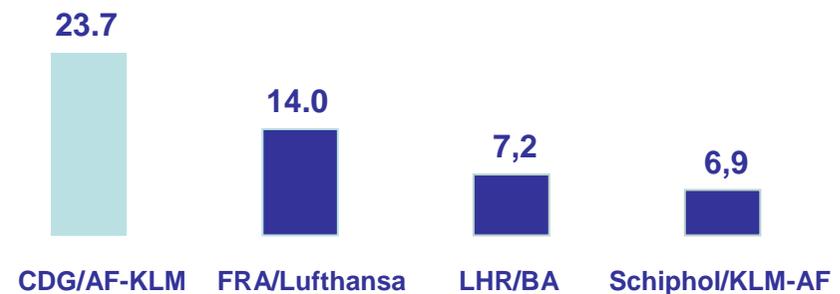
## Solid Origin/Destination traffic

(pax m - 2007)



## A unique offer in terms of connecting flights

(Opportunities for connecting flights within 2 hours, in thousands of connecting flights per week in summer 2008)

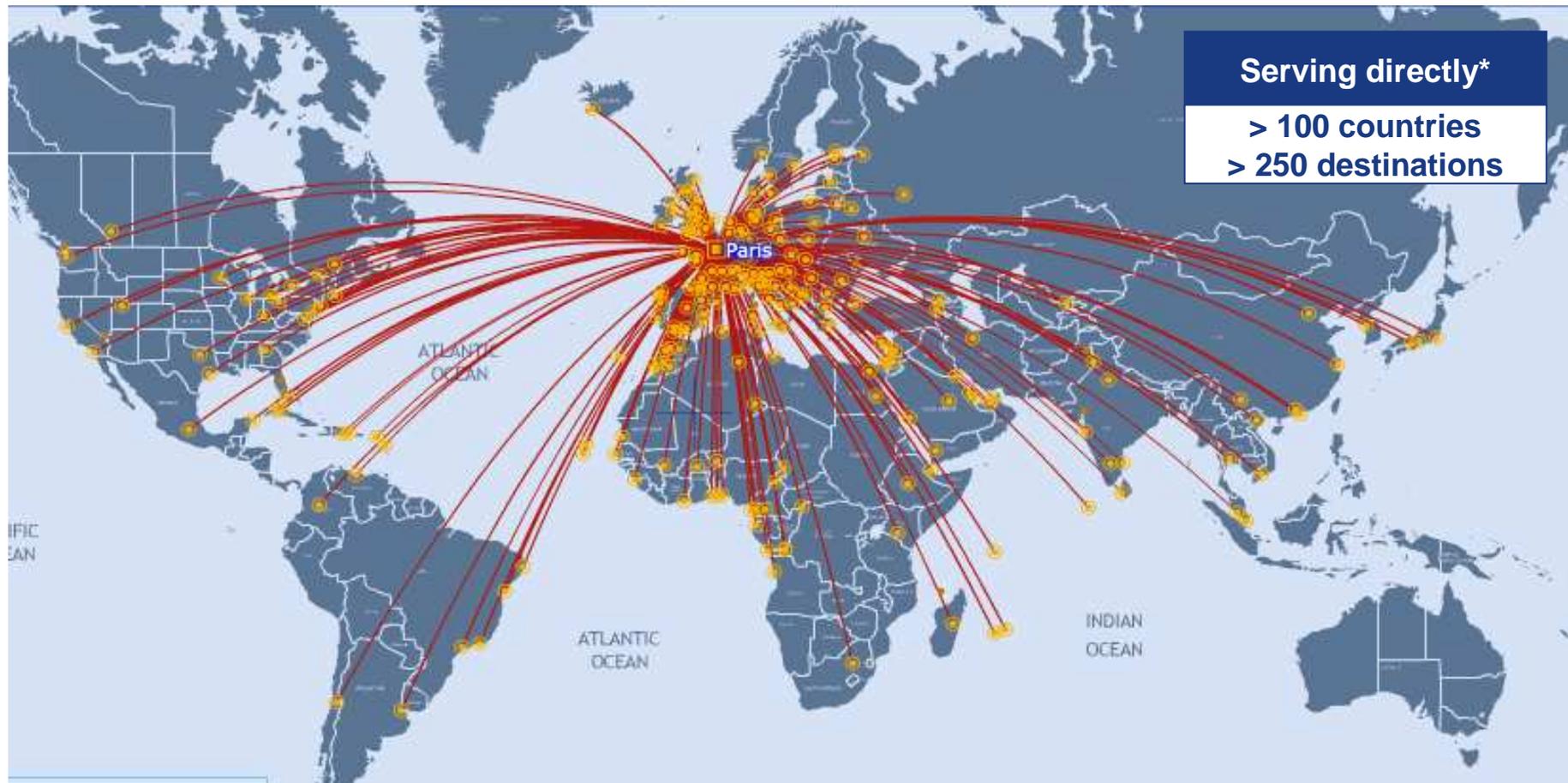


Source : Air France-KLM

(1) Aéroports de Paris estimate  
 (2) Frankfurt-main + Hahn.

# A strong international network of served destinations\*

## Paris – Charles de Gaulle



Sources : Données INNOVATA

\*Directly served international destinations in a week of summer season 2008



**Extensive modernisation of facilities:**

**Welcome to the  
New Paris-Charles de Gaulle!**

# Extensive modernisation of facilities



# Aéroports de Paris now has sufficient capacity to meet demand for numerous years

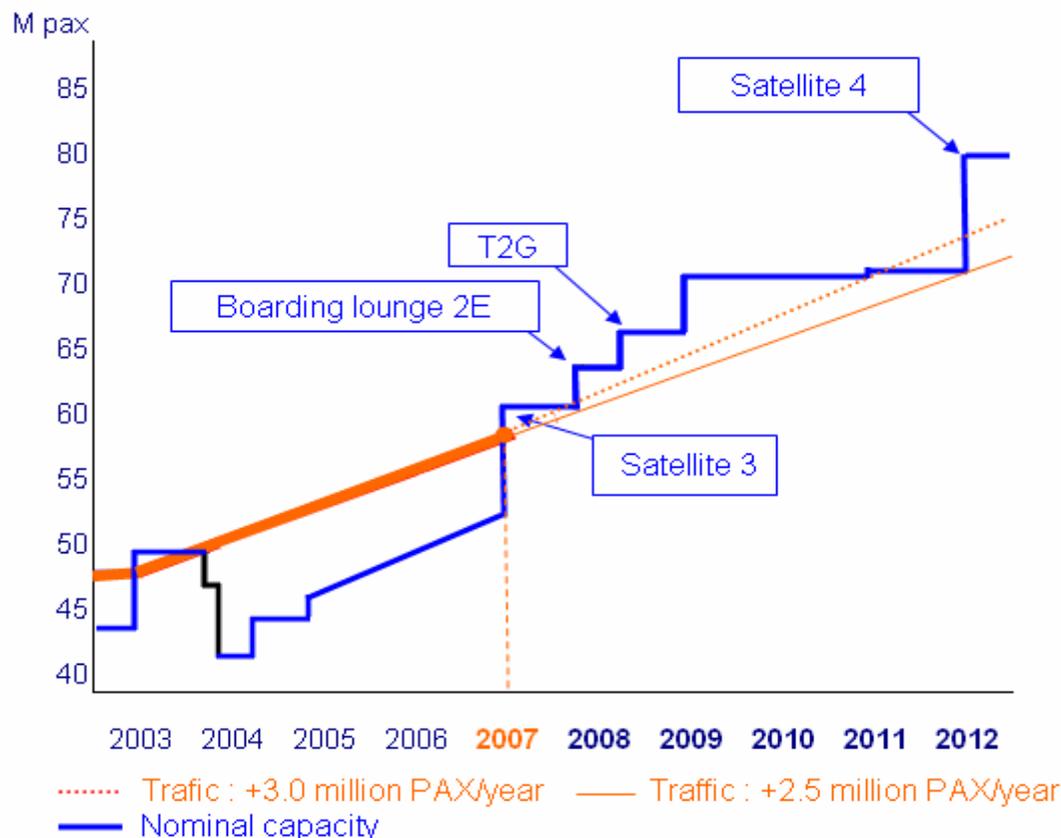
- Target: boost passenger capacity by 19.4m PAX between end 2005 and 2010
- Nominal passenger capacity in **2012: 81 million PAX**

↔ Rapid development of passenger capacity: mid-2007 to March 2009

➔ Next development phase: Satellite 4 in 2012



Nominal capacity in adequation with passenger traffic at Paris-CDG



# La Galerie Parisienne



- **Satellite S3 is an additional boarding room for terminals 2E and 2F**
- **Additional passenger capacity**
- **Improvement of quality of passengers accommodation**
- **26 aircraft stands**
- **Opened June 27, 2007**

## Size

**750 m long,  
36 m wide**

## Capacity

**+8.6 m pax  
180,000 sqm**

## Retail areas

**4,600 sqm of which  
3,200 sqm of shops**

## A380

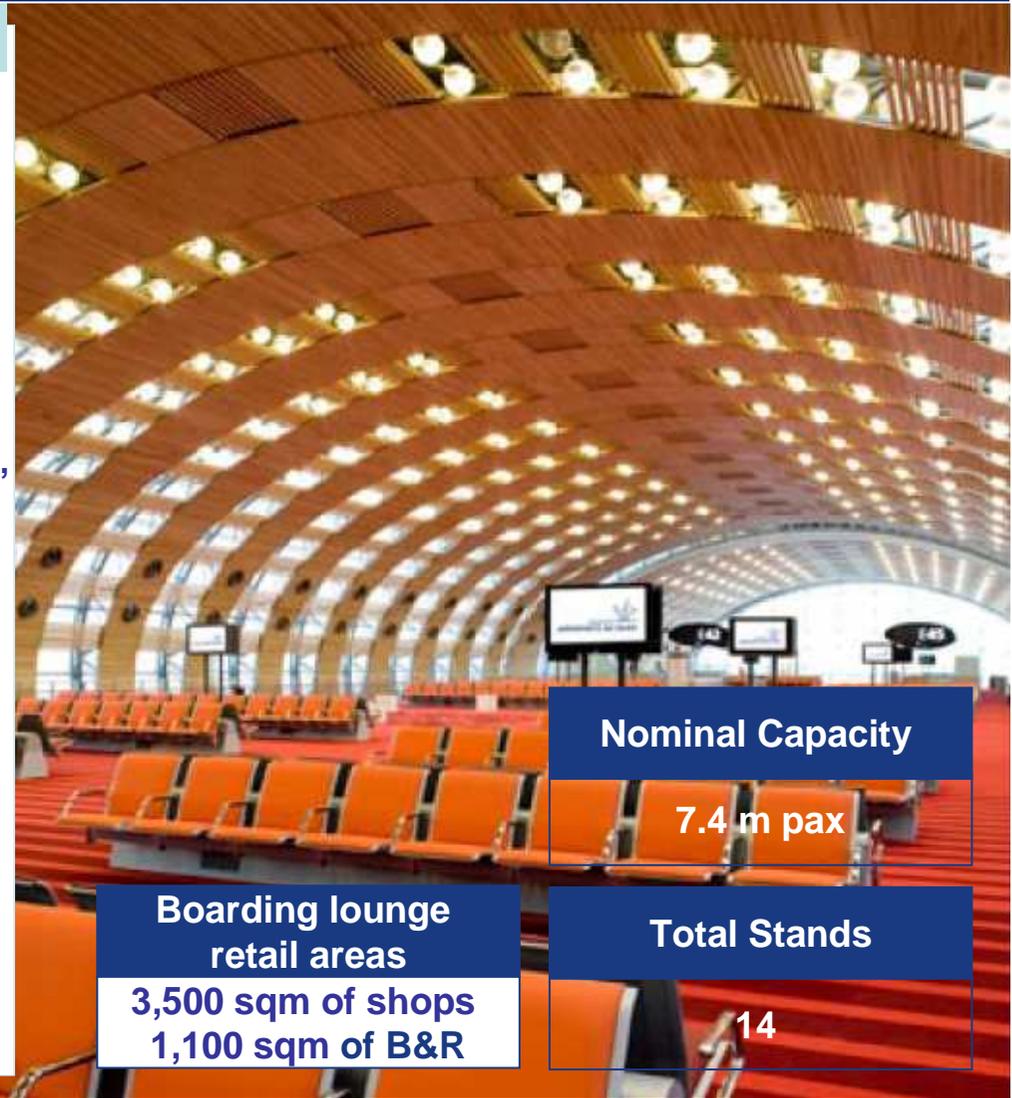
**6 stands,  
with upper deck access**



# March 30, 2008: Successful commissioning of CDG 2E's new boarding lounge

## A successful opening

- A much faster than expected ramp up:
  - Summer 2008 cruising regime reached a few weeks after opening
  - Successful cooperation with the hub operator AF-KLM
- Passengers
  - Terminal 2E, with its 2 new boarding satellites, la Galerie Parisienne and this new boarding lounge, will accommodate more than 40 000 passengers per day in summer 2008
  - Additional passenger capacity
  - Improvement in quality of passenger accommodation
- 14 Contact stands, contact rate improved
- A strong asset to consolidate the Paris-CDG hub as the N°1 entry point to Europe
- International traffic: USA, Asia, Africa, Latin America, Eastern Europe...



**Nominal Capacity**

**7.4 m pax**

**Boarding lounge  
retail areas**

**3,500 sqm of shops  
1,100 sqm of B&R**

**Total Stands**

**14**

# Coming up soon: Opening of new regional terminal 2G



## Capacity

3.0 m pax  
21,000 sqm

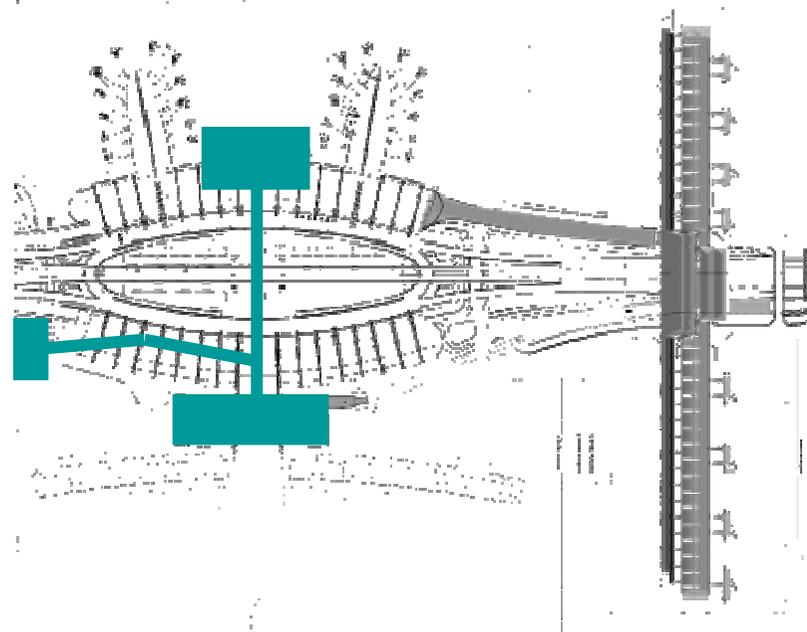
## Stands

26

- New regional terminal to complement existing infrastructures, dedicated to Schengen flights and medium size aircrafts (50 to 100 seats)
- Easy terminal, rapid passenger flows, connected to the hub
- 19 contact A/C stands + 7 remote stands
- Opening: September 2008

# TBE: the new automated baggage handling system

- Progressively taking over the origin/destination and connecting baggage of T2E, T2F and satellite S3
- Replaces ground vehicle movements and human handling by automated conveyors
- Objectives: better overall reliability, simpler logistics, includes full security screening





## 2008: The year of quality

# 2008: The year of quality

## Roadmap for 2008

- Priority on all forms of passenger service
- Roll out of **new way-finding system** at CDG and Orly (10,000 signs)
- **Special passenger service personnel** (additional reps)
- **Security screening areas:** new passenger handling guidelines
- July 2008: Aéroports de Paris takes responsibility for accommodating **persons with disabilities or reduced mobility**

## Way-finding

### Before



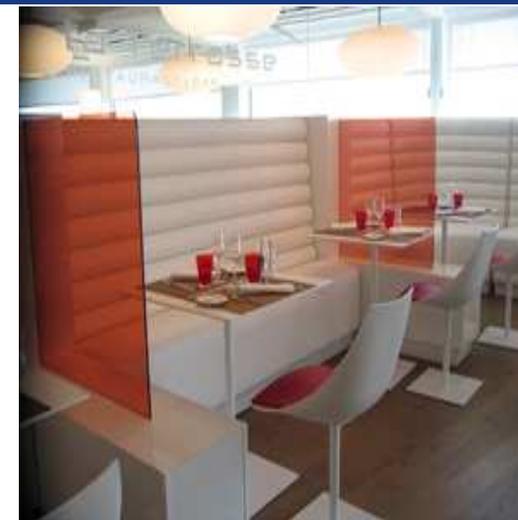
### After



# Passenger Information

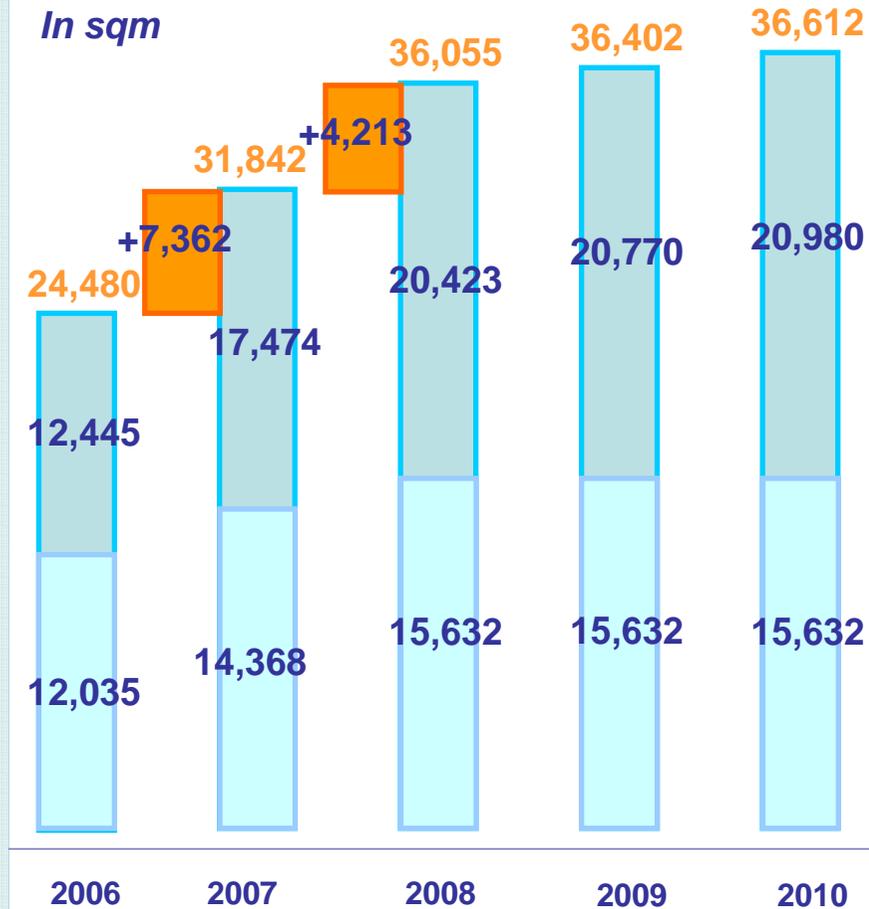


# Ambiance, comfort and services



# Rapid expansion of retail areas at Paris-CDG through 2010

## Retail expansion plans



## Rapid development

### •Main openings

	Shops	B&R
La Galerie Parisienne	3200	1400
New 2E boarding lounge	3500	1100
T2G	431	280



Shops



Bars &  
Restaurants



Annual growth  
of retail areas



AÉROPORTS DE PARIS

# Solid retail performances at “La Galerie Parisienne”

## ADP's shops receive travel retail industry awards

- The trade magazine *Duty Free News International* (15 Dec. 2007) gave its "best new shop" awards for beauty products, wine & spirits and tobacco to three shops in La Galerie Parisienne
- Beauty shop ahead of Hong Kong
- Liquor and wine / tobacco ahead of Copenhagen



# A unique retail and services offer at Paris-CDG 2E's new boarding lounge

**Boarding lounge  
retail areas**

**3,500 sqm of shops  
1,100 sqm of B&R**

**Total CDG 2E  
retail areas**

**3,900 sqm of shops  
2,500 sqm of B&R**



## A unique retail and services offer

- 32 shops & 8 bars and restaurants by the end of September (vastly completed by late June)
  - 50% monobrand shops
  - worldwide exclusive presence of 16 brands
- Already in the new boarding lounge:
  - Upscale shops: Hermes, Rolex, Cartier, Perfume and cosmetics, alcohol & tobacco...
  - An exclusive finger-food offer: Miyou by 2-star chef Guy Martin, Berts, Noura...
- Opening tomorrow: Van Cleef & Arpels, Chaumet
- Coming soon: Dior, Prada, and worldwide exclusive presence of YSL, new designer brands, Ladurée, La Maison du Chocolat...
- Satisfying passengers' top five requirements (natural light, colour, to see the aircrafts, a simple and easy airport, services adapted to their needs)
  - Comfortable rest and relax areas, kids and youth areas, work areas
  - Wi-Fi, power, shopping trolleys, information screens, accommodation of handicapped and disabled persons

*Bon voyage*

Thank you for your attention !

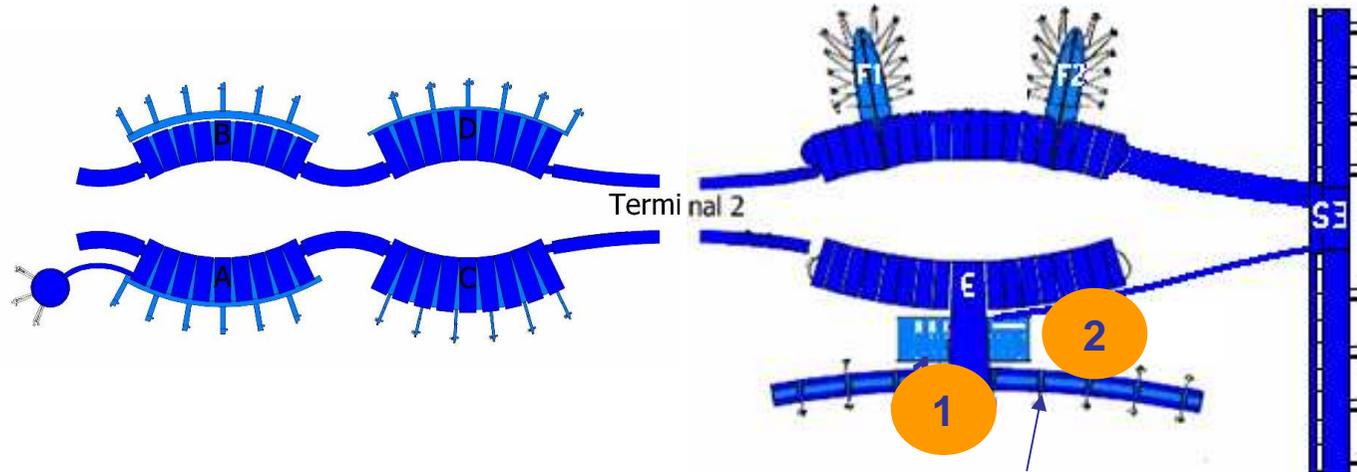


**AÉROPORTS DE PARIS**

# APPENDIX



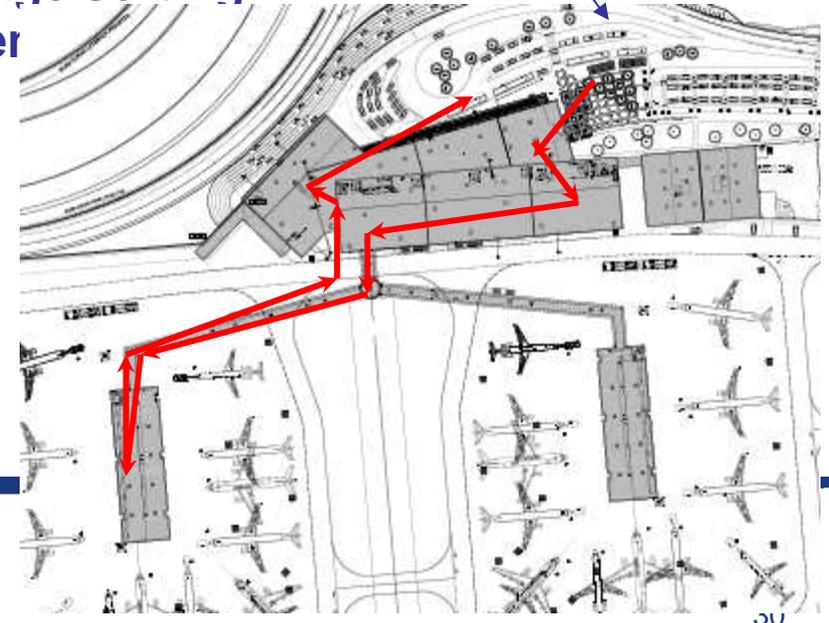
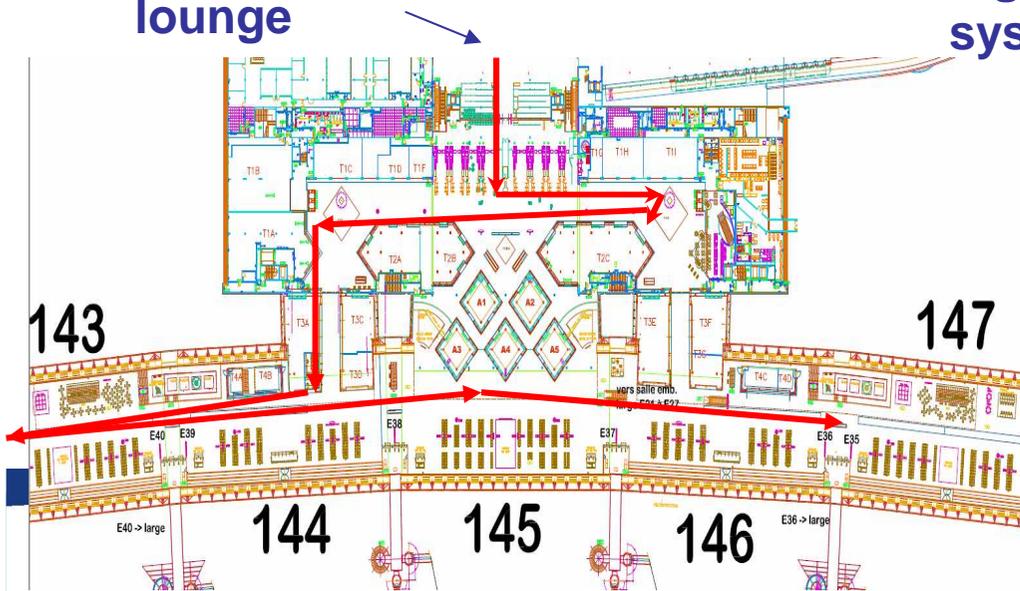
# Today's visit



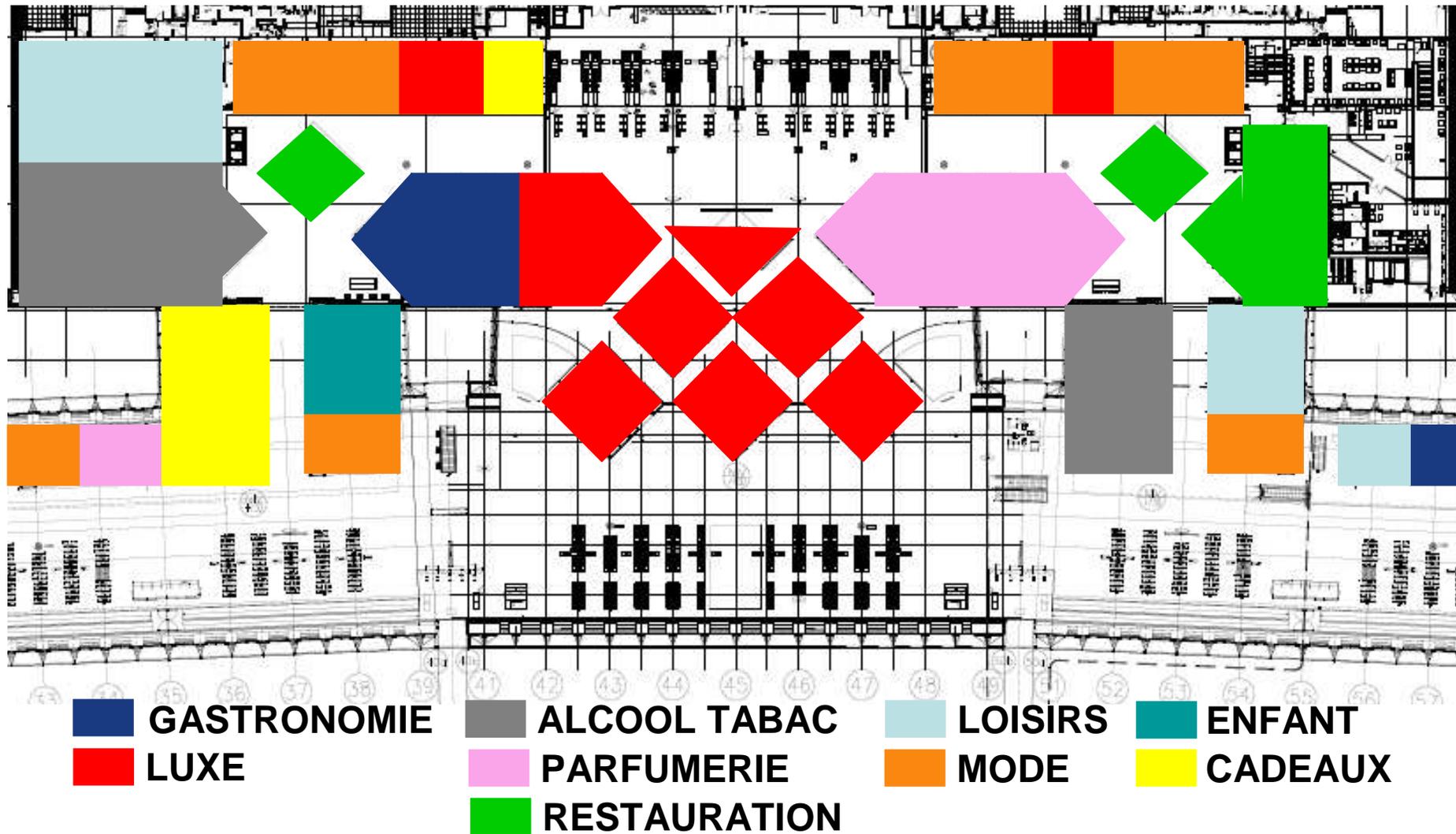
1. Visit to Terminal 2E and its new boarding lounge

2. Visit to the East luggage sorting system

3. Visit to the future Terminal 2G (work in progress)



# An optimized new retail area at CDG 2E



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