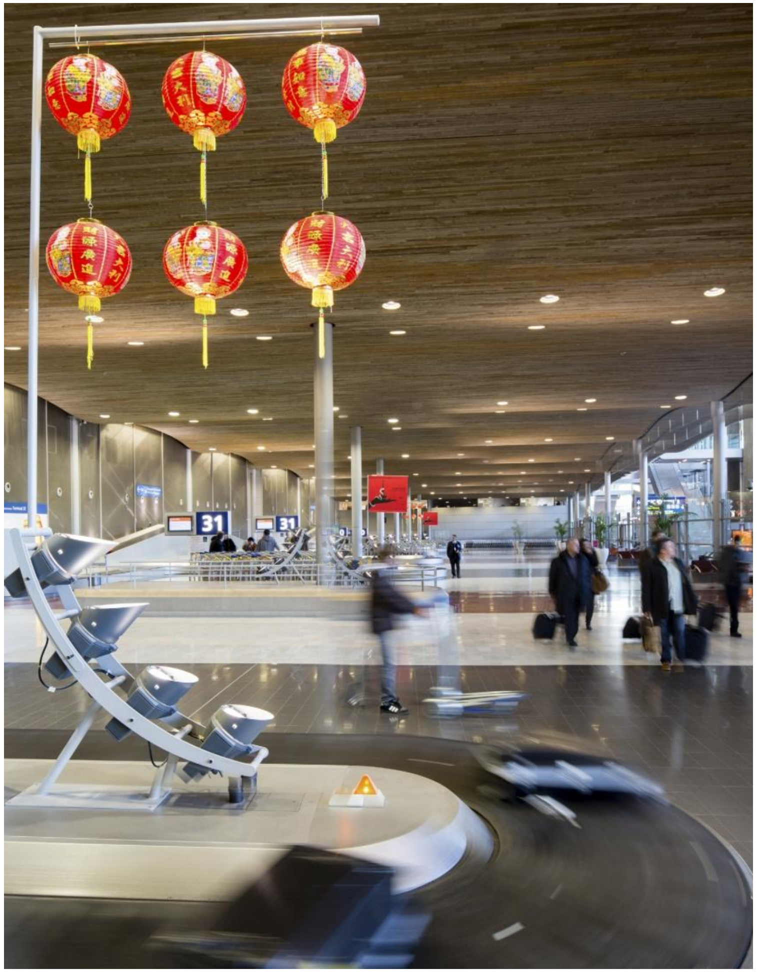

2013 Half-Year Results

29 August 2013

AÉROPORTS DE PARIS

Agenda

Introduction and strategic vision
Augustin de Romanet, *Chairman and CEO*

Financial results
Laurent Galzy, *CFO*

Conclusion and outlook
Augustin de Romanet, *Chairman and CEO*

Q&A

Introduction and strategic vision

Augustin de Romanet
Chairman and CEO

H1 results in line with 2013 forecasts

- Traffic in Paris up 0.5% with 43m passengers driven by **a positive mix of traffic** (international traffic +2.6%)

- **Dynamic trend in retail** (Sales/PAX* +8.5% at €17.6) and **in TAV Airports and TAV Construction** (contribution of €5m to the Operating Income from ordinary activities)

- **Increase in operating costs:** +5.4% and +1.5% excluding impacts of snowfall and scope effect linked to Nomadvance integration

- Operating Income from ordinary activities and net result attributable to the Group impacted by the strong increase in **depreciation and amortisation** and **income tax expense**

In €m	H1 2013	H1 2013 / H1 2012
Revenue	1,346	+6.2%
EBITDA	487	+4.1%
Operating Income from ordinary activities	286	0.0%
Net result attributable to the Group	125	-13.9%

** Sales/PAX= sales per departing passenger at airside shops*

NB : H1 2012 pro forma used in this slideshow are detailed in slide 24

A value creation strategy that relies on the "adjusted till"…

Regulated scope
Optimisation of value drivers

Progressive improvement of ROCE *(2015 target: 3.8% to 4.3% vs. 2.9% in 2012)* thanks to 4 value drivers:

- **Growth in traffic**: +0.5% in H1 2013
  2010-2015 assumption: +1.9% to 2.9% / year on average
- **Increase in tariffs**: +3% as at 1st April 2013
  2014 and 2015 caps: CPI+2.2%+QoS
- **Control over operating costs**: slowing down sharply in H1 2013
  Target: increase in operating charges limited to less than 3% per year on average between 2012-2015*
- **Control over capex**: -€150m reduction already decided over the 2013-2015 period
  Target: capex level in line with signed ERA

+

Non regulated scope
Continued dynamic of development

- **Retail:** *2015 target = Sales/PAX to €19.0 (€17.6 at H1 2013)*
  - **Retail areas**: to increase retail space by 5% (i.e. +2,800 sqm) by 2015 + prepare openings post 2015
  - **Adapted offering**: to position "Paris, capitale de la création"
  - **Passenger-traffic mix**: to capitalise on a traffic mix that is favourable to retail
- **Real estate**: *2011-2015 target: to develop 320 to 360,000 sqm of projects (~330,000 sqm secured in the pipeline at H1 2013)*
- **Airport investments:**
  - Developing synergies between ADP - ADPI - ADPM - TAV and between ADP - Schiphol
  - Applications to Rio and La Guardia

= **2015 Group EBITDA up by between 25 and 35% compared to 2009**

** Parent company*

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…that carries with it financial discipline…

Control over costs	**Capping the increase in operating costs*** *to less than 3% per year on average between 2012-2015:* ▪ Implementation of a cost-savings plan (effective in May 2013) **Downsizing*** *by 7% between 2010 and 2015 (vs. 1.2% between 2010 and 2012)* ▪ Benefiting from natural evolution: control over recruitment in progress ▪ Employment policy: opening negotiations aimed at implementing a voluntary departure scheme of 370 positions (starting 2014) in connection with a recruitment plan (passenger handling positions:120 employees and maintenance: 60 employees)
Control over capex plan	**Reduction of €150m* compared to the capex programme presented to the Board of Directors meeting in December 2012 thanks to:** ▪ The prioritisation of investments ▪ The improvement in the selection and optimisation of investment process
Discipline over future undertakings	**Selecting the most profitable internal and external projects** **Discipline in competitive bidding process:** example of cooperation with TAV Airports during the tender bid for the 3rd Istanbul airport

** For the parent company*

*** Intangible and tangible capex of the regulated and the non-regulated perimeter, in 2013 euros.*

…further development of retail…

Growth and optimisation of retail space

Increase in sqm:

- 2012-2015 : +2,800 sqm to reach a total of 58,800 sqm
- Over the LT: Orly South-West junction, BD junction and T4

Refurbishment and optimisation of the oldest retail spaces :

- 2013-2015 : 2A, 2C, 2F and 2E
- Over the LT : 2B, and CDG1 satellites

Refinement of the offering

Continued positioning on
“Paris, capitale de la création”

- 3 key product families : perfumes, luxury fashion and gastronomy
- Emblematic brands
- 3 Parisian concept stores: department store, multibrand and souvenirs

Broadening the product range
« affordable fashion »

Positive development in traffic mix

Strong growth expected in international traffic:

- CAGR $_{2012\text{-}2016e}$ BRICs: +5.6%
- Attractiveness of Paris and France that remains the world’s leading tourist destination

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…and a structural improvement of our organisation

For our customers	▪ Creation of a **customer department** dedicated to passengers and airlines ▪ Strengthening of **passenger handling positions** ▪ Priority to the **operational robustness** (maintenance, optimisation, …) ▪ **Policy of proximity** with the relocation of ADP headoffice
For our employees	▪ Improvement of **career paths and professional mobility** ▪ Improvement of **management drivers** to have a more effective pay policy
For our shareholders	▪ **Increasing the efficiency and preparing the basis for future growth:** – Making process and working methods: evolve towards greater efficiency (training policy, capex selection process, …) – Benefiting from synergies in engineering, in commercial prospection towards international, in the airport value chain

Our ambition for Aéroports de Paris

Optimisation of the Paris asset	▪ **Putting the customer back at the heart of our strategy:** provide our passengers with an "airport experience" and step up the dialogue with airlines ▪ **Capture world growth:** becoming the European reference in travel retail by focusing on the Paris brand and adapting our infrastructures and our services to the growth in international traffic ▪ **Ensuring operational robustness:** continuing optimisation and upgrade of our Paris airports
Focused external growth strategy	▪ **Furthering the integration of TAV Airports and TAV Construction:** strengthen the monitoring of the subsidiaries ▪ **Developing the "Group approach"** in commercial prospection and the setting up of consortium ▪ **Optimising the return on investment** thanks to a disciplined selection process and high standards

Financial results

Laurent GALZY
CFO

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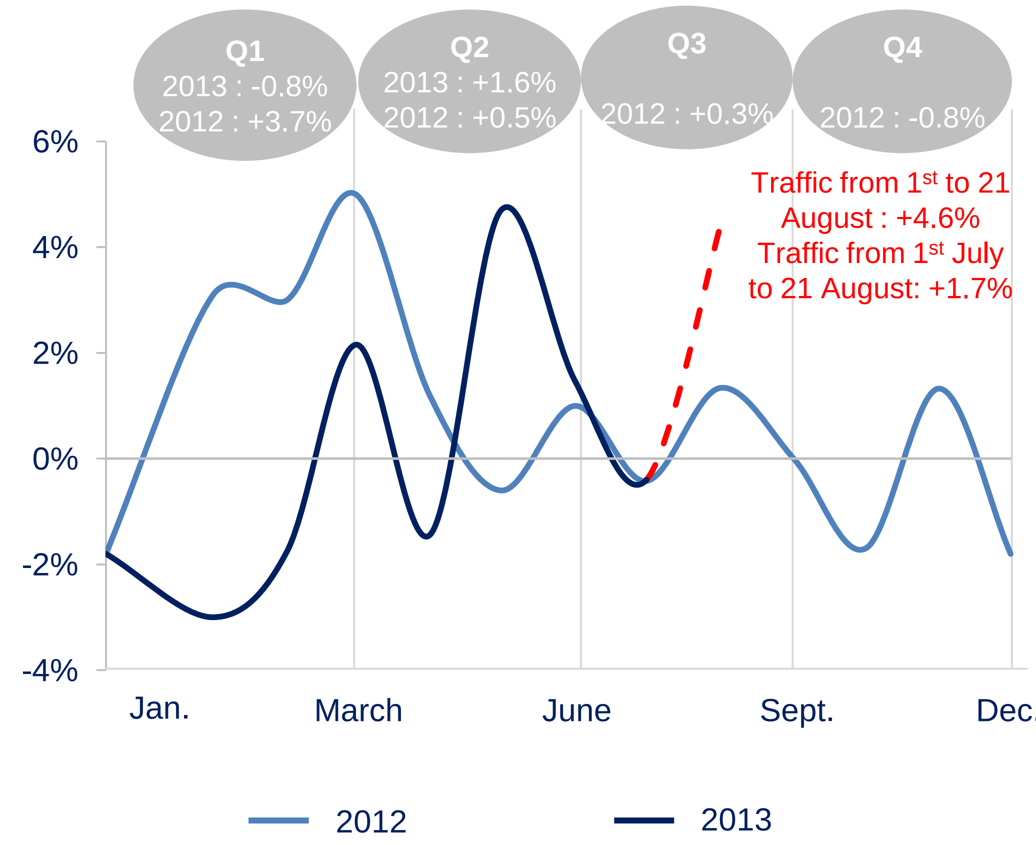
Dynamic trend in traffic for ADP group

ADP vs peers

	M pax	Var. H1 2013 / H1 2012
Paris - CDG+ORY	**43**	**+0.5%**
London - Heathrow	**34**	**+2.4%**
Frankfurt - Fraport	**27**	**-1.0%**
Amsterdam - Schiphol	**25**	**+3.0%**
Istanbul - Atatürk	**24**	**+18.0%**
Madrid - Barajas	**19**	**-14.7%**
ADP Group*	**60**	**+5.6%**
Incl. TAV Group @38%	*15*	*+24.2%*
Fraport Group*	**46**	**+3.2%**

Monthly change in ADP traffic



** Stake-weighted traffic*

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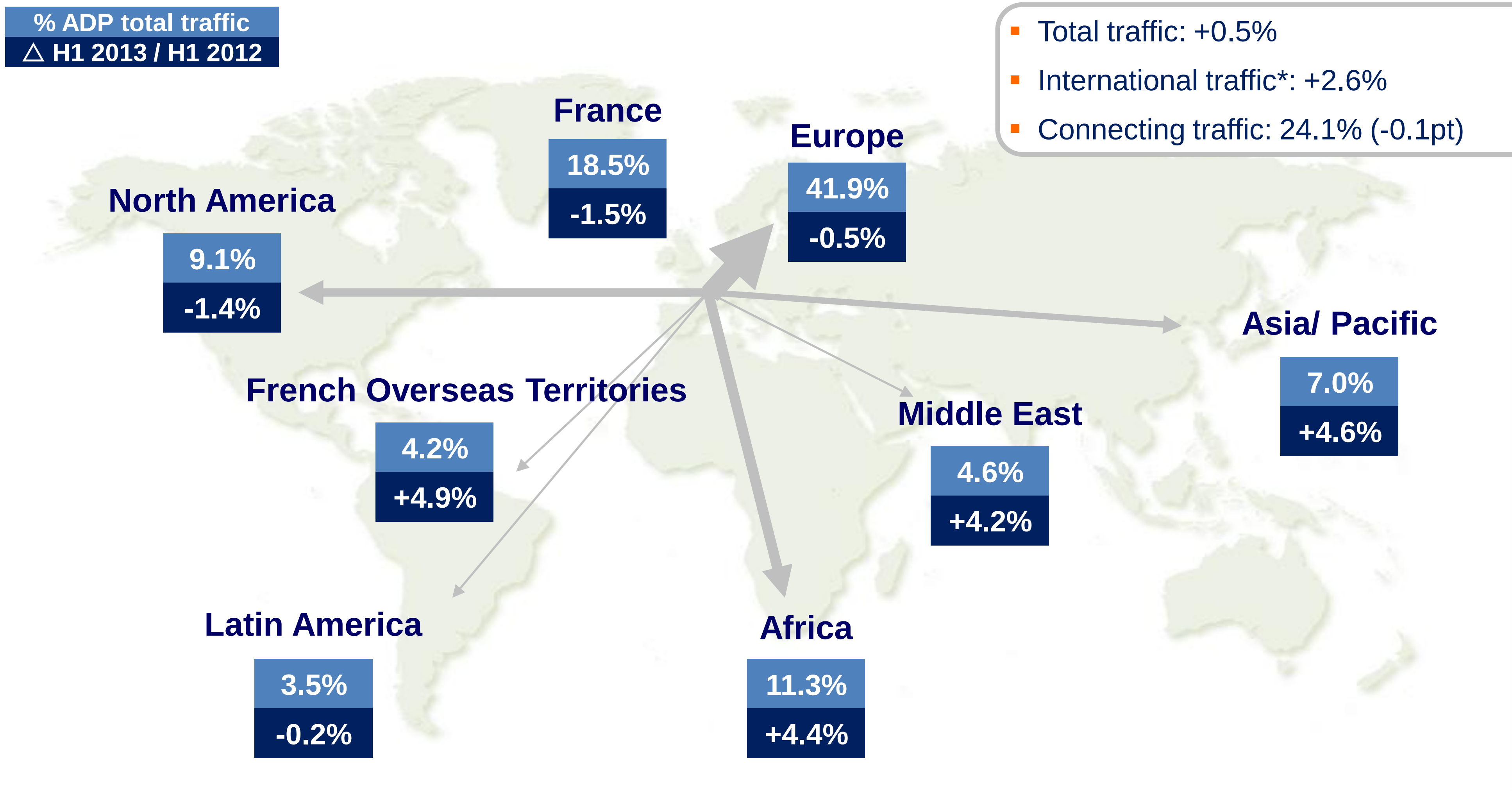
Positive passenger-traffic mix at Paris' airports

Growth driven by international traffic

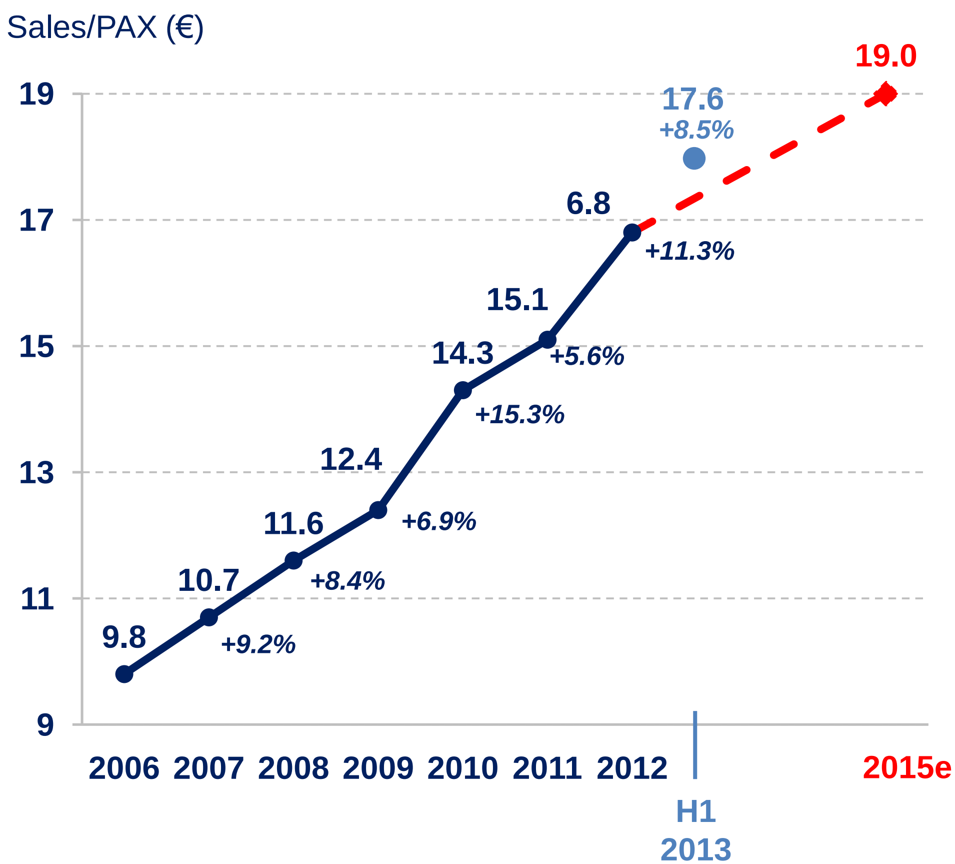
- Total traffic: +0.5%
- International traffic*: +2.6%
- Connecting traffic: 24.1% (-0.1pt)



* *Excluding France and Europe i.e. 39.6% of total ADP traffic*

Continued strong growth of sales/PAX: +8.5% at €17.6

Constant and sustained growth in sales/PAX since 2006



Strong contribution of new infrastructures and BRIC countries

Duty Free (international area) : +6.3% at €32.3

- Strong contribution of new retail spaces: satellite 4 (€42.4) and AC block (€40.6)
- Traffic from and to BRIC countries up by 5.6%
  - Russia: +14.0%
  - China: +8.9%
- Excellent performance of Fashion and Accessories (+29.1%) and Gastronomy (+20.5%)

Duty Paid (Schengen area): +7.4% at €6.5

- New offering in Fashion and Accessories of 2F
- Success of the diversification strategy of Relay towards snack food and souvenirs

Sales/PAX= sales per departing passenger at airside shops

H1 results in line with 2013 forecasts

Very good performance of retail and real estate

In €m / %		Revenue		EBITDA		Operating Income from operating activities		Net result attributable to the Group	
Aviation		791	*+4.0%*	145	*-0.9%*	8	*-69.9%*		
Retail and Services		472	*+7.4%*	261	*+5.6%*	213	*+5.0%*		
Real Estate		133	*+6.7%*	78	*+6.3%*	57	*+5.5%*		
Airport Investments		5	*-14.5%*	(2)	*N/A*	6	*-5.6%*		
Other activities		129	*+13.9%*	5	*N/A*	1	*N/A*		
TOTAL		**1,346 ***	***+6.2%***	**487**	***+4.1%***	**286**	***0.0%***	**125**	***-13.9%***

** Including inter segment eliminations of -€184m*

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EBITDA up by 4.1%

Revenue growth greater than the growth in operating costs

In €m	H1 2013	H1 2013 / H1 2012*
Revenue	**1 346**	**+6.2%**
Capitalised production	30	-5.2%
Operating costs	**(893)**	**+5.4%**
including:		
consumables used	(75)	+33.8%
external services	(336)	+1.8%
employee benefit costs	(378)	+5.9%
taxes other than income tax	(92)	-3.8%
other operating expenses	(13)	+38.8%
Other income and expenses	4	-75.0%
EBITDA	**487**	**+4.1%**
EBITDA/Revenue	*36.2%*	*-0.7pt*

- **Consumables used: +€19m**
  - Winter products: +€12m
  - Nomadvance scope effect: +€8m
- **Controlled external services (+€6m) despite the impact of the strengthening of winter operations: +€6m**
- **Employee benefit costs: +€21m**
  - ADP SA (+4.4%): +€13m
  - Subsidiaries (+13.4%): +€8m including Nomadvance scope effect (+€7m)
- **Other income and expenses:** favourable impacts in 2012 not renewed in 2013 for €12m

** See H1 2012 pro forma in slide 24*

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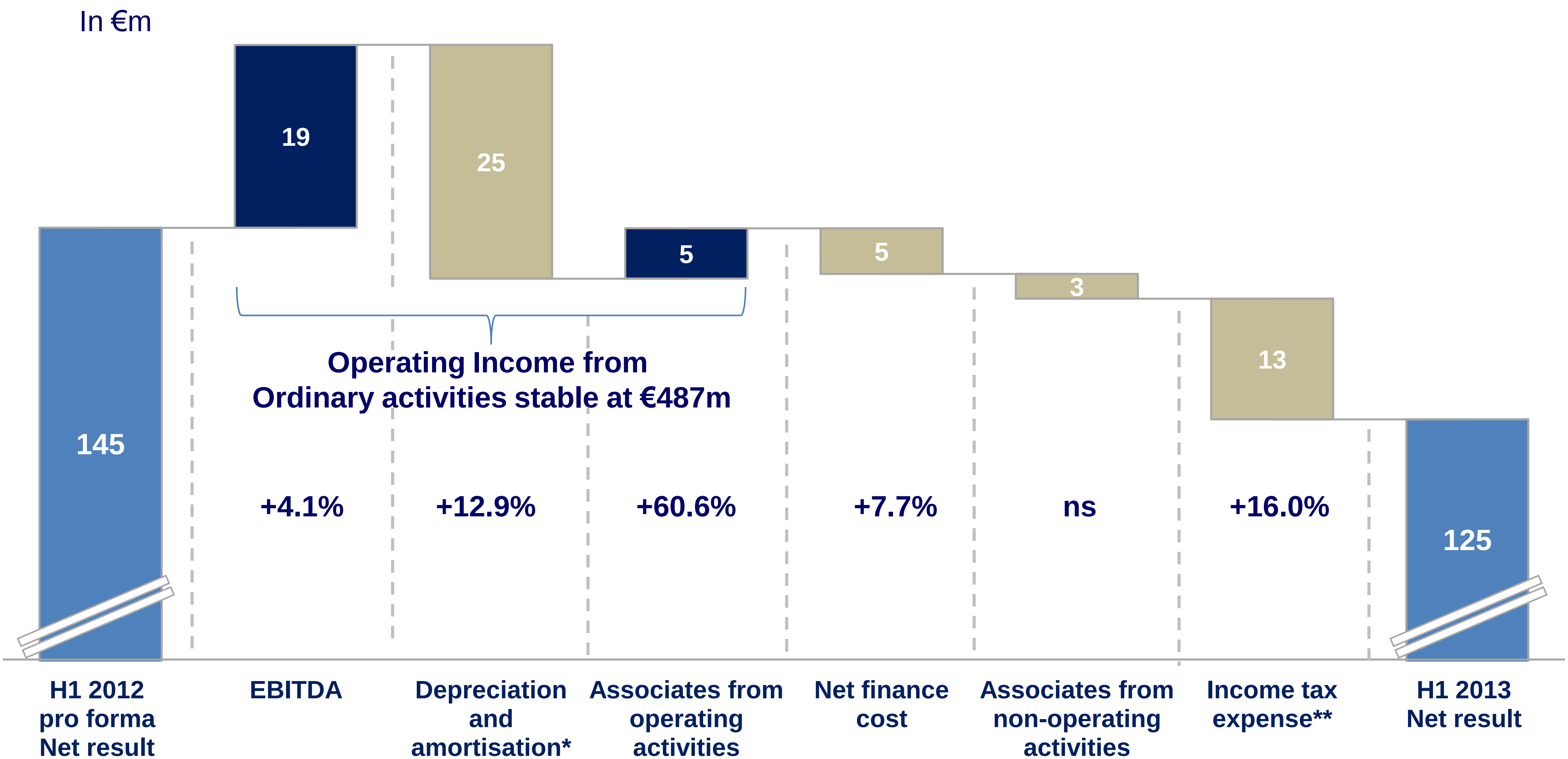
Net result attributable to the Group down by 13.9%

Increase in depreciation and amortisation and income tax expense



** Including an amortisation of €4m linked to disposal of aircraft stands*

*** Including a provision (€6m) related to a tax adjustment risk, the new 3% tax on dividends (€6m) and the capping of the deduction of net financial charges (€2m)*

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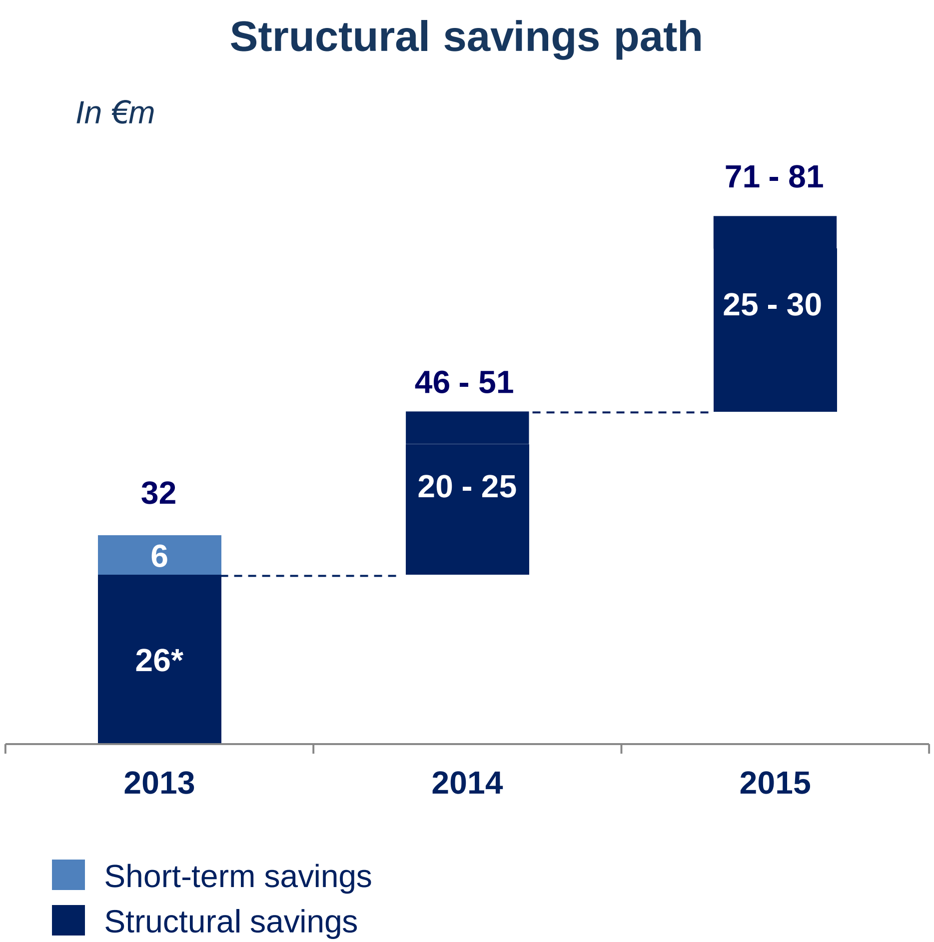
2013-2015 efficiency and modernisation plan

Defined structural savings



- **Cost-saving plan (consumables used and other intermediary comsumables):**
  - Mutualisation of security controls
  - Studies and research expenses
  - Other: telecommunication expenses, fuel purchases,…
- **Active management of employment:**
  - Opening negotiations aimed at implementing a voluntary departure scheme of 370 positions starting 2014 (set aside provision during H2 in non-operating costs)
  - Associated recruitment plan: 120 passenger handling positions and 60 maintenance trades

** Including around €10m of savings on security without EBITDA impact*

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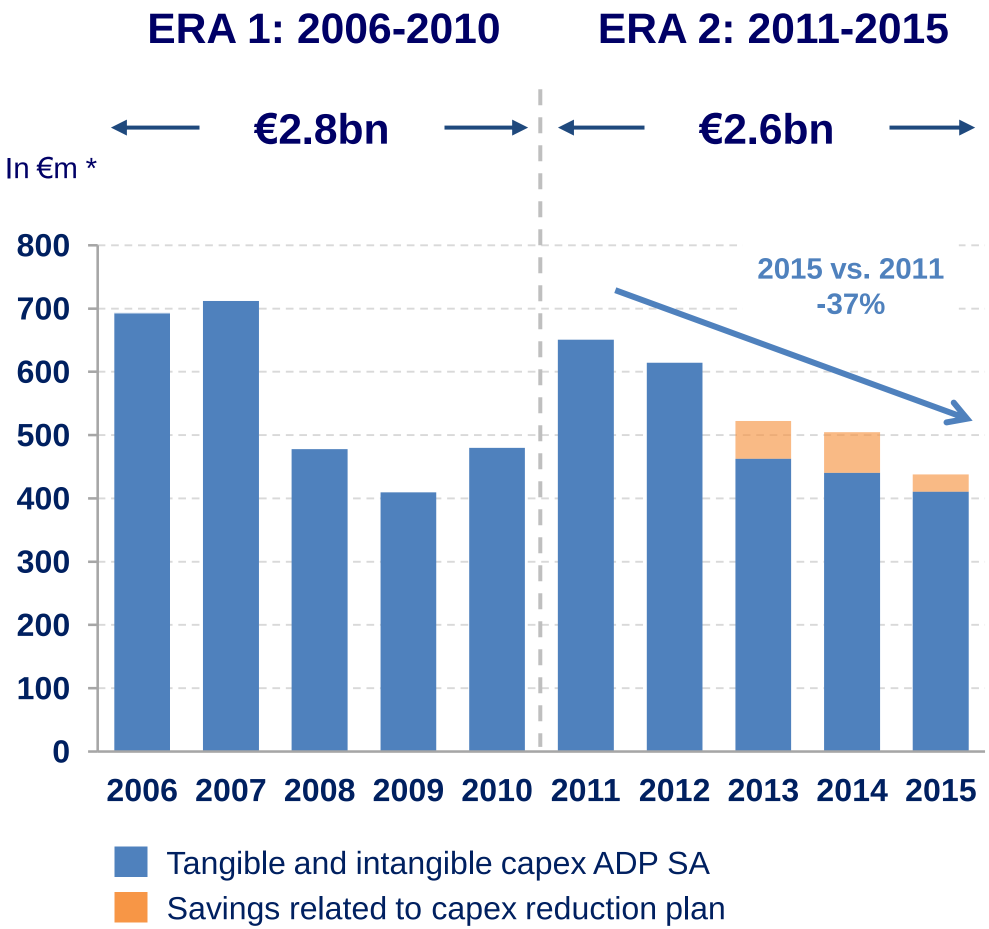
2013-2015: continued decrease in the capex cycle



Capex reduction plan aimed at going back the initial allocation of €2.6bn:

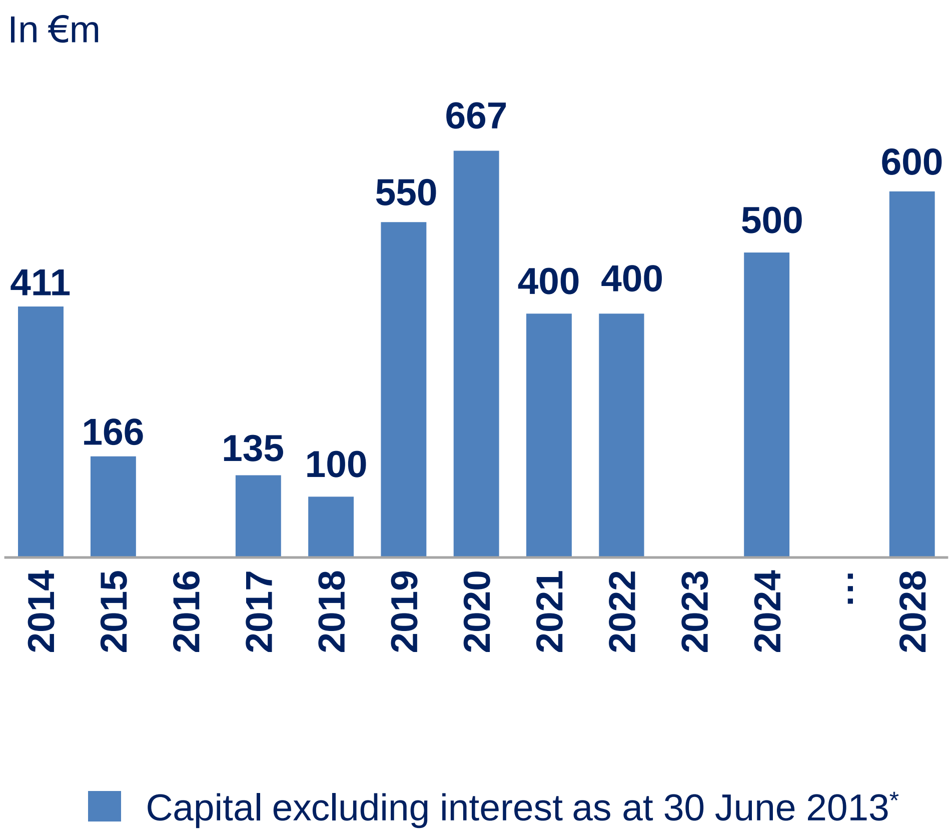
- Prioritisation of capex: full review of projects and trade-off
- Optimisation of investment costs: use of second opinion on projects
- Postponing of some projects made possible by the traffic situation: 2B terminal and BD junction

~ €150m of savings compared to the capex programme presented at the Board of Directors meeting in December 2012

** In constants euro terms, 2013 value since 2013*

A sound financial situation

Debt schedule



- Net debt: €3.2bn
  - 84% of debt at fixed rate**
  - Average maturity: 7.8 years
  - Average cost: 3.2%
  - Gearing: 87% vs 81% at the end of December 2012***
- Rating A+, negative outlook (S&P)
- 15-year bond issue of €600m in June 2013 bearing interest at 2.75%

* *Nominal value after currency swap*

** *After currency swap*

*** *Pro forma*

Conclusions and Outlook

Augustin de Romanet
Chairman and CEO

AÉROPORTS DE PARIS

Towards an optimisation of the value creation model

1. First half **in line with forecasts and targets confirmed**
2. **Potential for the creation of value in retail remains considerable**
3. **First results** of the reduction plan of OPEX/CAPEX in H1 2013
4. Continued **improvement of the organisation of the company**

Confirmation of 2013 forecasts and 2015 targets

2013	▪ **Revenue and EBITDA expected in slight growth,** assuming that traffic remains stable
2015	▪ **EBITDA up from 25 to 35% compared to 2009,** on the basis of an assumption of traffic growth of between 1.9 and 2.9% per year on average between 2010 and 2015 ▪ **Increase in operating charges of the parent company limited to less than 3% per year on average between 2012-2015**

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Q&A

APPENDIX

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Pro forma H1 2012

Impact of the application of the amendments of IAS 19:

In €m	H1 2012 as published	H1 2012 pro forma	Change	
Revenue	1,267	1,267	-	
EBITDA	464	468	+4	Employee benefit costs: -€3m (IAS 19 revised), +€7m (change of presentation)
Operating Income from Ordinary Activities	282	286	+4	
Operating Income	282	286	+4	
Net financial income/expense	(56)	(63)	-7	Financial expenses: -7 m€ (change of presentation)
Income tax expense	(80)	(79)	+1	Impact of revised IAS 19
Net result attributable to the Group	147	145	-2	

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Scope and main guidelines of 2011-2015 ERA

	Aeronautical activities	Non-aeronautical activities
Regulated	▪ **Aeronautical fees** (passenger, landing, parking) ▪ **Ancillary fees** (check-in desks, luggage sorting systems, de-icing, …)	▪ **Car parks** ▪ **Industrial services** ▪ **Rental revenue** ▪ **Airport real estate**
Non-regulated	▪ **Airport security tax**	▪ **Commercial activities** ▪ **Diversificative real estate** ▪ **Subsidiaries and associates**

Main guidelines of the agreement signed on 23 July 2010

- €2.1bn* of capex on the regulated scope
- Tariffs: inflation + 1.38% on average per year

Traffic outlook

- Assumption of traffic growth of between 1.9 and 2.9% per year on average between 2010 and 2015 **
- An adjustment mechanism related to traffic reviewed in depth in order to be less volatile and less contra-cyclical

10 indicators linked to quality of service

- 3 categories of indicators with a greater weight given to customer satisfaction indicators
- Impact of +/- 0.1% per indicator on the cap of the increase in fees

** In euros 2013*
*** Revised in December 2012*

ERA II regulated scope (adjusted till) as at 31 Decembre 2012

In €m (unless stated otherwise)	**2012**	**Change 12 / 11**
Regulated Operating Income*	233	-9.2%**
Regulated Asset Base	5,059	+4.1%
RoRAB	2.9%	-0.6pt

RoRAB down by 0.6 point to 2.9 % mainly because of:

- the decrease in regulated operating income impacted by the increase of costs and of depreciation and amortisation
- and the increase in the regulated asset base following the opening of satellite 4 and A-C junction

** EBIT – capital losses on asset disposals – employee's share of income*
*** % change base on the pro forma 2011 regulated operating income to €257m*

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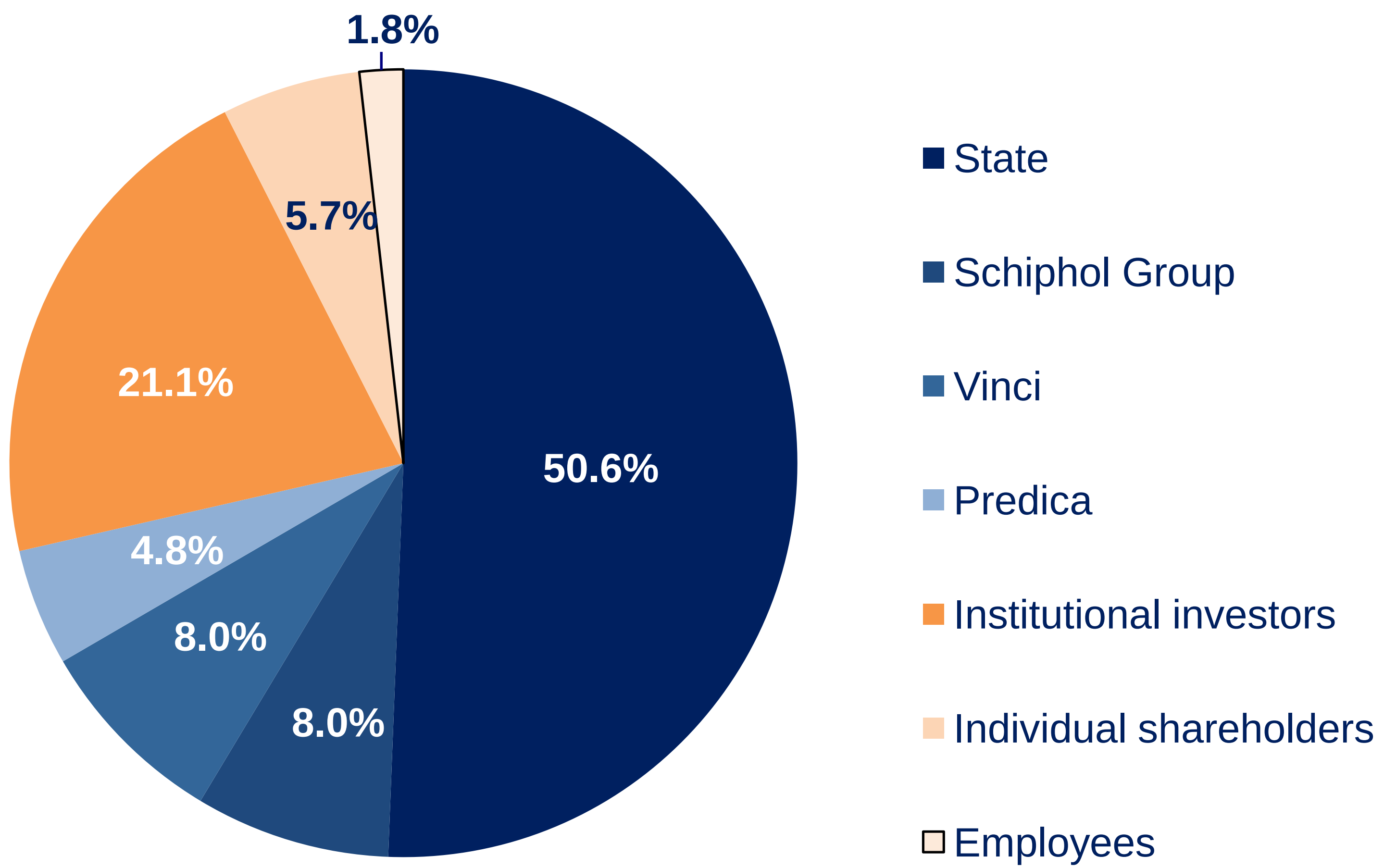
Shareholding structure (as of 5 July 2013)



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H1 results in line with 2013 forecasts

In €m (unless stated otherwise)	**H1 2012 pro forma**	**H1 2013**	**Change H1 2013 / H1 2012**
ADP passengers (in m)	42.8	43.0	+0.5%
Revenue	1,267	1,346	+6.2%
EBITDA	468	487	+4.1%
Profit/loss of associates from operating activities	*9*	*14*	*+60.6%*
Operating income from Ordinary Activities	286	286	0.0%
Operating income	286	286	0.0%
Net financial cost	*(63)*	*(67)*	*+7.7%*
Income tax expense	*(79)*	*(92)*	*+16.0%*
Net income share of the Group	145	125	-13.9%

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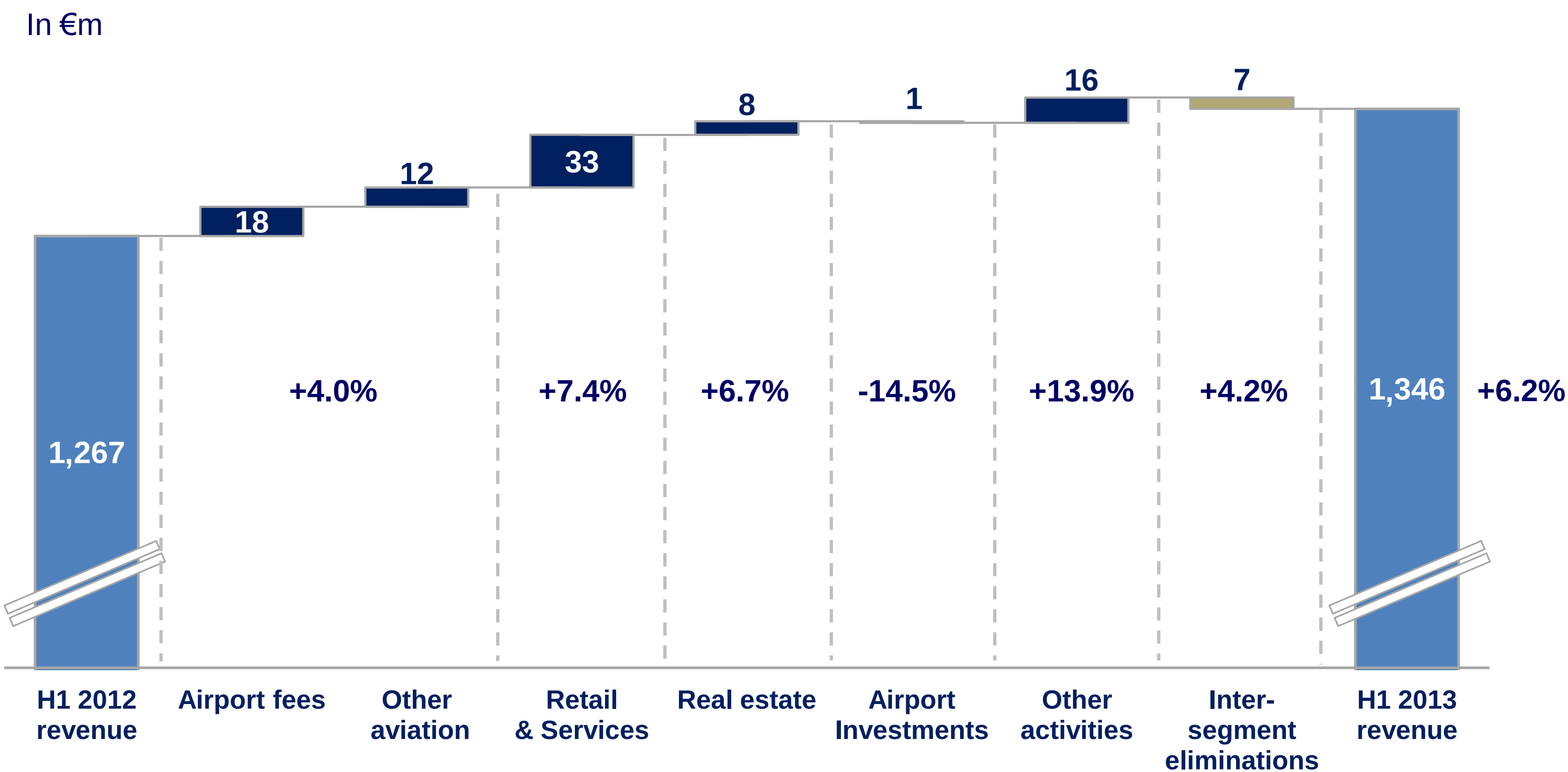
Revenue up by 6.2%

Strong growth in aviation, retail and real estate



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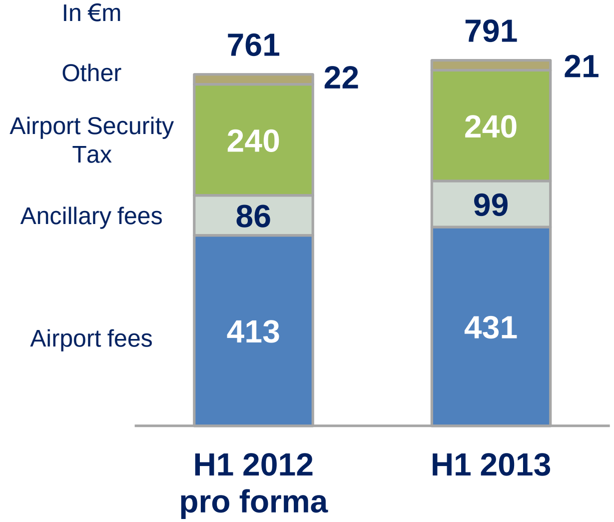
Aviation

P&L

Revenue: +4.0%



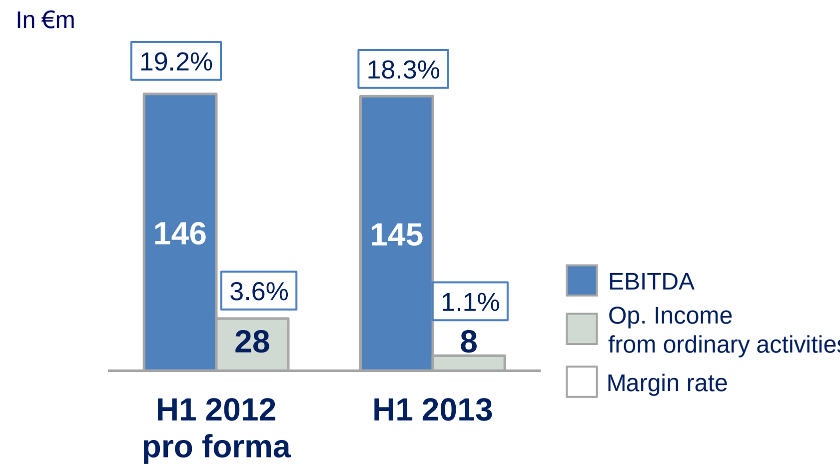
Airport fees (+4.4%) : +€18m

- Tariffs: +€13m
- Traffic (incl. Mix effect): +€6m
- Tariff incentive: -€1m

Ancillary fees (+14.9%) : +€13m

- De-icing fee: +€11m

EBITDA: -0.9% / Operating Income from ordinary activities: -69.9%



EBITDA and Operating Income from Ordinary activities down:

- Operating costs (+4.6%): winter operations (purchase of winter products +€12m, sub-contracting +€6m then EBITDA impact -€7m including the increase in de-icing fee)
- Depreciation and amortisation (+15.2%): impact of new infrastructures (satellite 4 and A-C junction) and amortisation linked to the disposal of aircraft stands (€4m)

EBITDA/Revenue (%) : -0.9 pt

Aviation

Group traffic by airport

		ADP stake[1]	Stake-weighted traffic (m pax)	Change H1 2013 / H1 2012
ADP	Paris (CDG + Orly)	@ 100%	43.0	+0.5%
	Regional Airports Mexico	@ 25.5%[2]	1.6	+5.1%
	Jeddah - Hajj	@ 5%	0.2	-4.2%
	Amman	@ 9.5%	0.3	+4.7%
	Mauritius	@ 10%	0.1	+1.8%
	Conakry	@ 29%	0.0	-9.7%
TAV	Istanbul Atatürk	@ 38%	9.3	+18.0%
	Ankara Esenboga	@ 38%	2.0	+16.0%
	Izmir	@ 38%	1.8	+10.4%
	Other airports	@ 38%	1.8	+128.1%
	Total Group (stake-weighted)		**60.2**	+5.6%
	Management contracts		5.4	+16.4%

1) *Direct or indirect*
2) *Of SETA, which owns 16.7% of GACN controlling 13 airports in Mexico*
3) *Madinah (since July 2012), Tunisia, Georgia and Macedonia. Like for like, including Madinah 2012 first-half traffic, traffic at TAV's other airports would have been up 10.3% for the period from January to end of June 2013 compared to the same period in 2012.*
4) *Algiers, Phnom Penh and Siem Reap*

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Aviation
Airport fees

In €m	H1 2013	Change H1 2013 / H1 2012
Airport fees	**431**	**+4.4%**
Landing	275	+4.4%
Parking	94	+1.9%
Passenger	62	+8.5%

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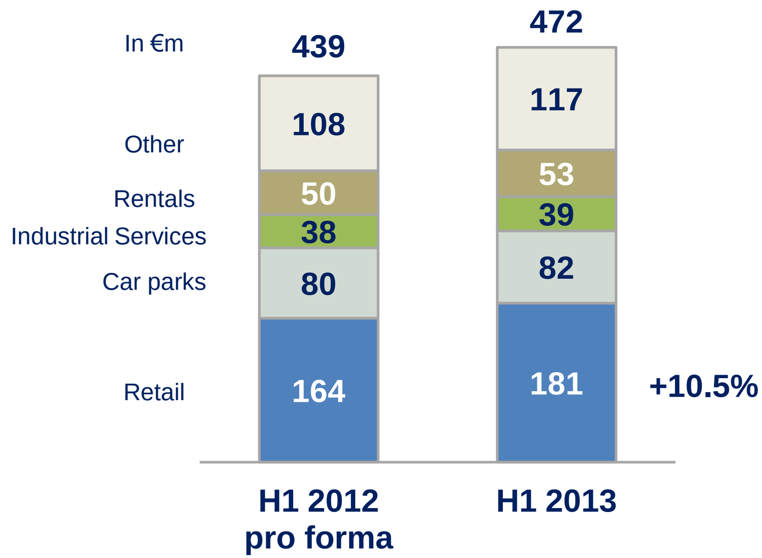
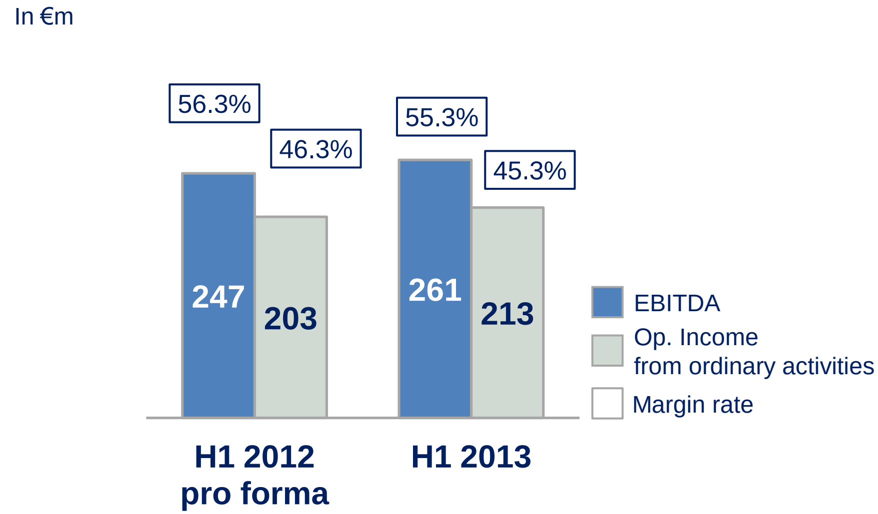
Retail and Services

P&L

Revenue: +7.4%



EBITDA: +5.6% / Operating Income from ordinary activities: +5.0%



Retail (+10.5%): +€17m

- Airside shops (+10.1%): +€12m
- Sales/PAX: +8.5% to €17.6
- Advertising (+18.7%): +€2m

Rentals (+6.8%): +€3m

- New desks in satellite 4

Car parks (+2.8%): +€2m

Growth in EBITDA and Operating Income from ordinary activities impacted by the increase in operating charges and depreciation and amortisation

- Depreciation and amortisation: +8.3%
- P&L of associates from operating activities (JVs with Lagardère and JCDecaux): +10.4% to €3m

EBITDA/Revenue (%): -1.0 pt

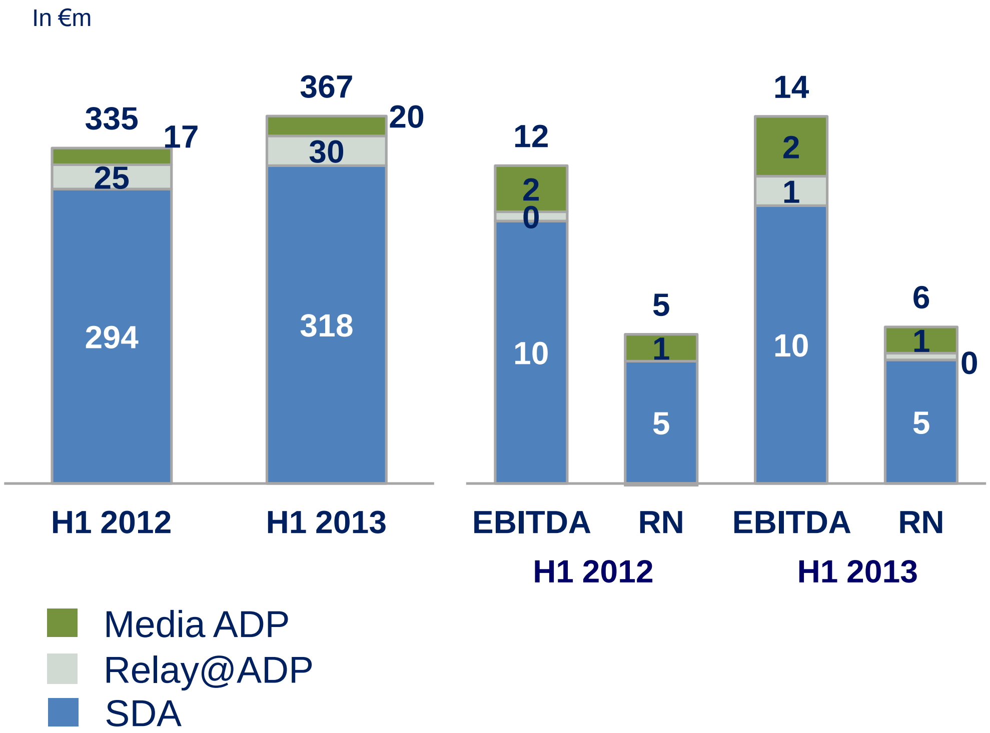
Retail and Services

Focus on commercial joint ventures

Continued growth of revenue and EBITDA…

Revenue: +9.5%

EBITDA: +15.5%
Net result: +6.7%



…essentially driven by the opening of satellite 4 and A-C junction

SDA (retailing JV with Lagardère):

- Revenue up by 8.0% thanks to Fashion and Accessories:
  - Opening of satellite 4 and A-C junction
  - Increase in sales/PAX
  - Improvement of the mix of traffic

Relay

- Revenue up by 21.1% thanks to the success of the diversification strategy of Relay towards snack food and souvenirs

Media ADP:

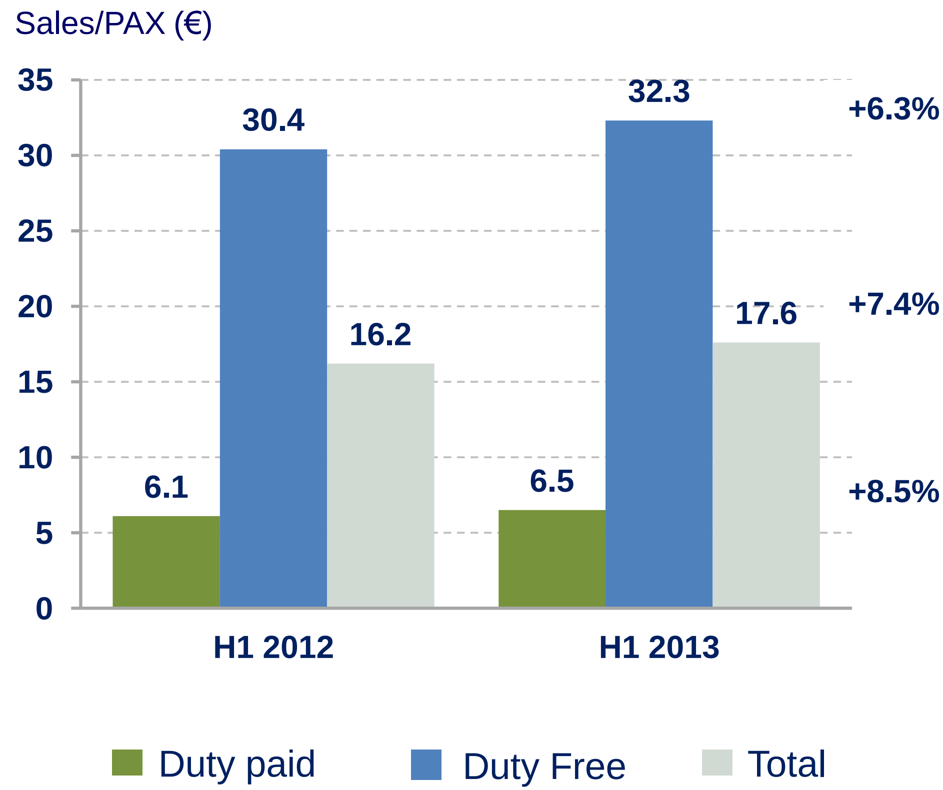
- Revenue up by 18.3% thanks to digital activity

Retail and Services

Detail of commercial rents and sales/pax

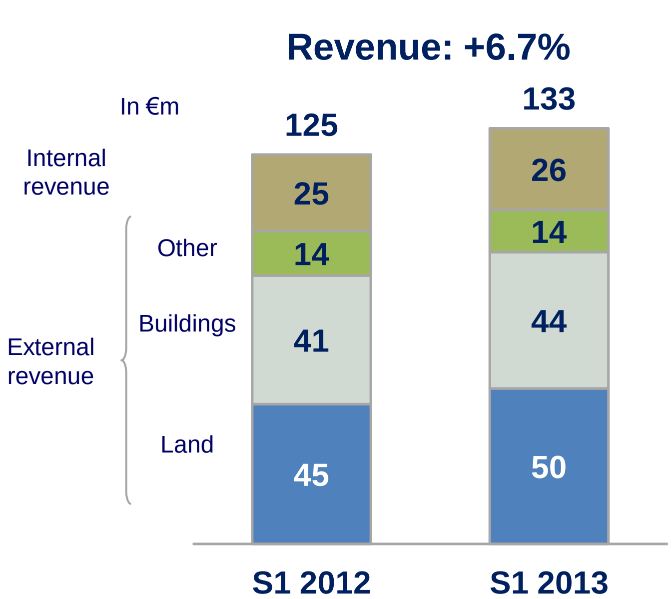
Retail: +10.5%

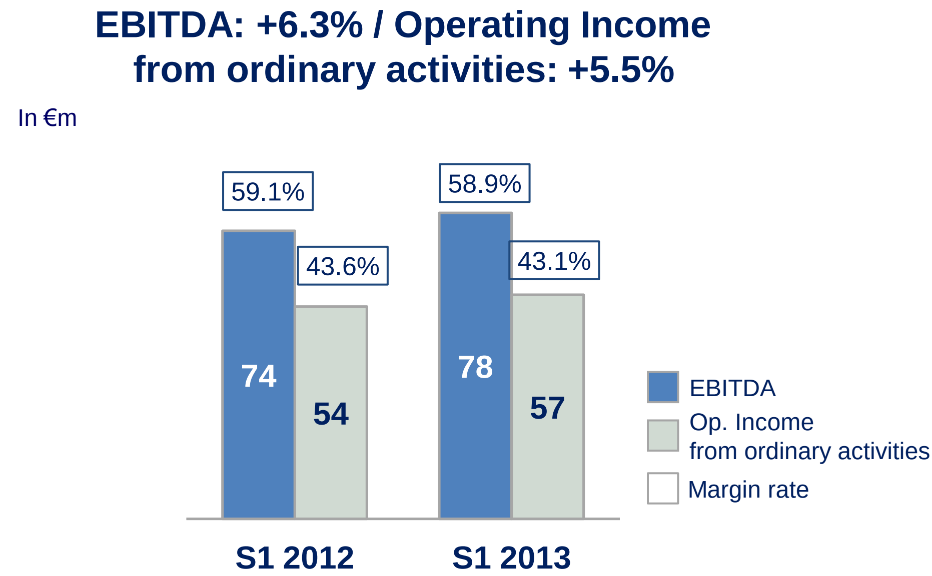
Sales/PAX H1 2013 : +8.5% to €17.6



AÉROPORTS DE PARIS

Real estate
P&L





External revenue (+6.7%) : +€7m

- Rent indexing: +€4m
- New occupations: +€3m
- Terminations: -€3m
- Other effects: +€3m

Internal revenue (+7.0%) : +€1m

Strong increase in EBITDA and Operating Income from ordinary activities

Stable EBITDA/Revenue

Real estate

Pipeline of projects as at 30 June: 330 000 sqm to be delivered by 2015

Platform	Segment	ADP Role	Operator	Projects	Opening	Surface (sqm)
Delivered projects						**132,600**
CDG	Diversification	Developer	IBIS	Hotel extension	2011	8,600
ORY	Diversification	Developer	Compass	Operation premises	2011	4,250
CDG	Diversification	Developer	Miscellaneous	Offices	2011	1,300
ORY	Diversification	Developer	Franprix	Logistics	2012	28,000
CDG	Aeronautical	Developer	Air France	Baggage storage	2012	11,700
CDG	Diversification	Developer/Investor	Servair/AF	Continental Square 3 Offices	2012	13,250
CDG	Diversification	Developer	Air France	Engine test bench	2012	5,500
ORY	Diversification	Developer	Miscellaneous	Logistics	2012	22,000
CDG	Aeronautical	Developer/Investor	Miscellaneous	Cargo station GB3	2012	18,000
CDG	Diversification	Developer	Aélia	Operation premises	2012	20,000
Projects in progress (to be operated before 2015)						**197,300**
CDG	Diversification	Developer	Unibail	Aéroville shopping center	2013	110,000
CDG	Aeronautical	Investor	Miscellaneous	Operation premises	2013	5,700
CDG	Diversification	Investor	Miscellaneous	Offices	2013	700
CDG	Aeronautical	Developer	Sodexi	Cargo	2014	9,000
CDG	Diversification	Developer	Citizen M	Hotel	2014	6,100
CDG	Diversification	Developer	Accor	3* Hotels	2014	27,000
CDG	Diversification	Developer	Miscellaneous	Warehouse	2014	1,000
CDG	Diversification	Developer	Miscellaneous	Industry	2015	19,000
ORY	Diversification	Developer	Miscellaneous	Logistics	2015	10,000
ORY	Diversification	Developer	Miscellaneous	Mailing	2015	8,800
Total projects delivered or in progress during ERA 2						**329,900**
Projects in progress (delivery after 2015)						**30,000**
CDG	Diversification	Developer	Miscellaneous	Offices and storage	2015/2016	30,000
Projects in preparation						**65,100**
ORY	Diversification	Developer/Investor	-	Cœur d'Orly	-	19,800
ORY/CDG	Div./Aero.	Developer/Investor	-	Miscellanous	-	45,300
						Guidance 2011-2015* : 320,000 – 360,000

** Surface area of building owned by Aéroports de Paris or third parties built on Aéroports de Paris' land between 2011 and 2015*

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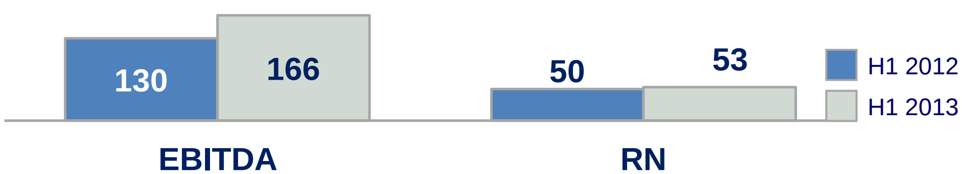
Airport investments
P&L

In €m	H1 2012	H1 2013
Operating Income from ordinary activities, incl.:	6	6
Schiphol (P&L of associates from op. activities)	*7*	*7*
*TAV Airports (P&L of associates from op. activities)**	-	*1*
ADPM	*-0*	*-0*
Other	*-0*	*-2*

TAV Airports at 100%

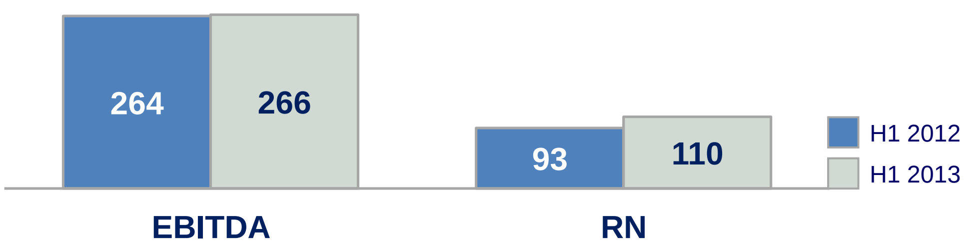


EBITDA: +28.0%

- Increase in traffic at all airports

Net Result: +7.0%

SCHIPHOL at 100%



EBITDA: +1.0%

- Increase in traffic and retail

Net Result: +18.9%

** Please note that TAV Airports was not consolidated in H1 2012*

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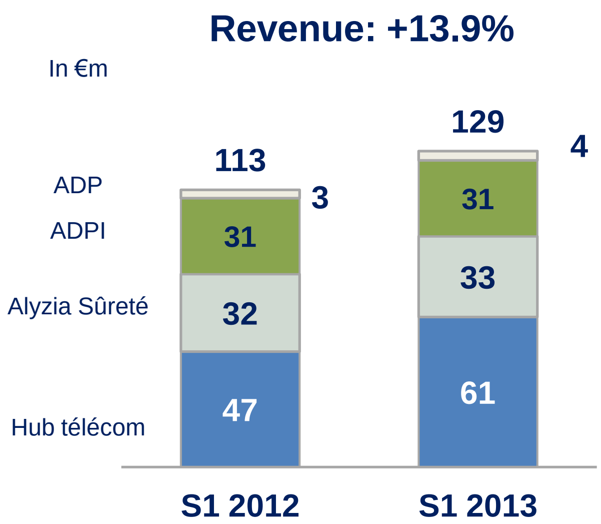
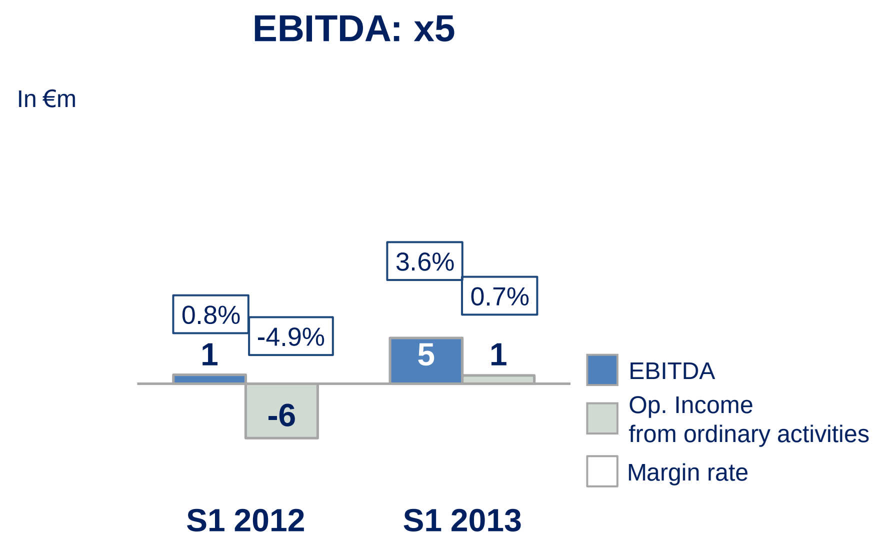
Other activities

P&L





Hub télécom (+30.0%): +€14m

- Nomadvance acquisition

Alyzia Sûreté (+3.9%): +€1m

ADPI stable

- Backlog: €75m

Operating Income from Ordinary activities: +7M€

- Hub télécom: -€2m to €1m
- Alyzia Sûreté: -€1m to -€1m
- ADPI: +€2m to -€2m
- TAV Construction: +€3m* to €3m
- Other: +€5m

** Please note that TAV Construction was not consolidated in H1 2012*

Disclaimer

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About Aéroports de Paris

Aéroports de Paris builds, develops and manages airports including Paris-Charles de Gaulle, Paris-Orly and Paris-Le Bourget. In 2012, Aéroports de Paris handled almost 89 million passengers, 2.3 million tonnes of freight and mail in Paris, and 40 million passengers at airports abroad.

Boasting an exceptional geographic location and a major catchment area, Aéroports de Paris Group is pursuing its strategy of adapting and modernising its terminal facilities and upgrading quality of services; the Group also intends to develop its retail and real estate businesses. In 2012, Group revenue stood at €2,640 million and net income at €341 million.

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