

Presentation to Asia Pacific Gateway & Corridor Initiative – Toronto Workshop

Panel Discussion: Continental and Global Connections – Issues, Opportunities & Imperatives

June 18, 2010



Winner 2010 IATA Eagle Award

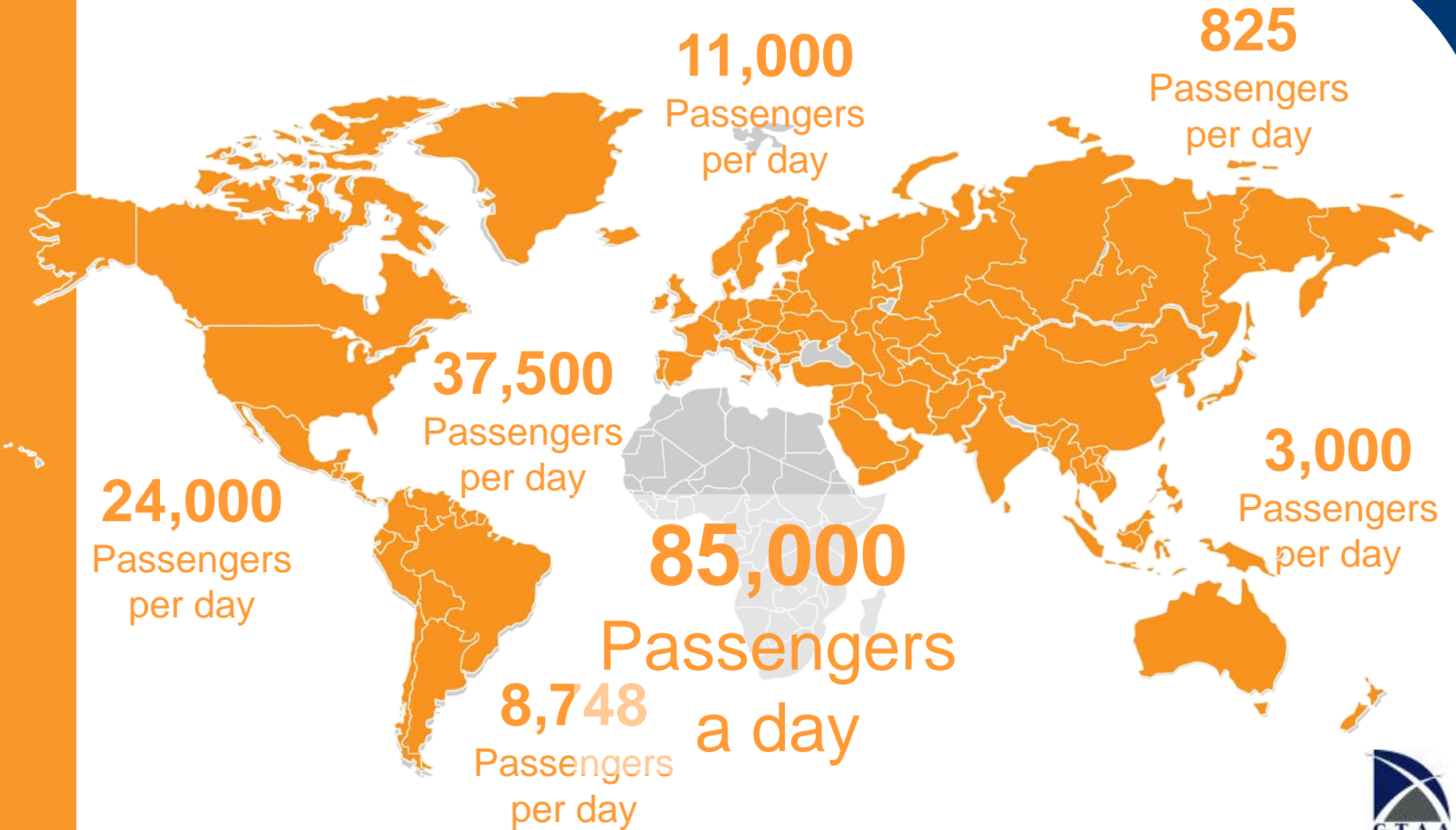


Toronto Pearson: The Gateway to North America

- Cultural/financial capital
- Culturally diverse
- Canada's economic engine



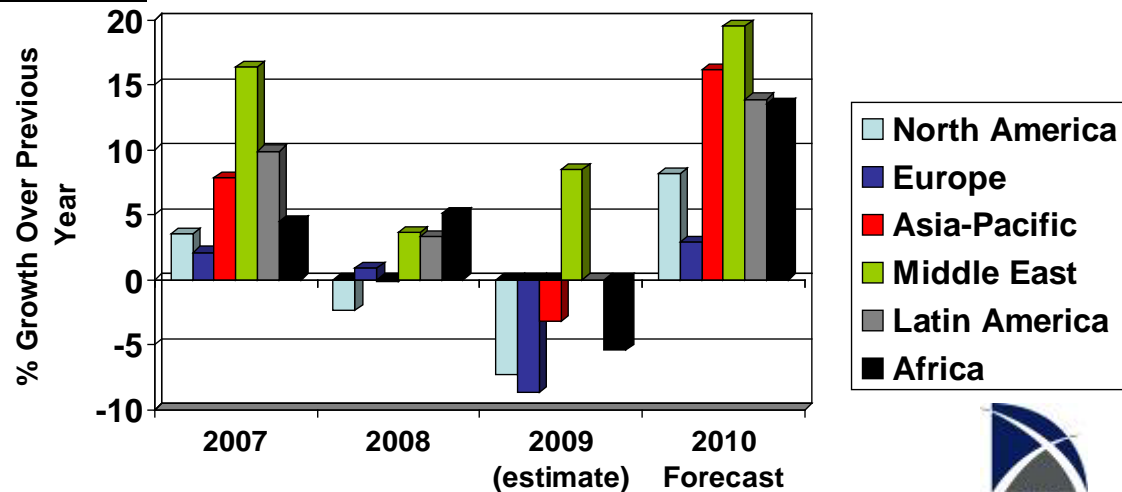
Where are people going everyday?



Asia Pacific Region: Looking Forward

City	Area	Rank	Total Passengers
Manila	Asia Pacific	1	102,241
Delhi	Asia Pacific	2	160,409
Tehran	Middle East	3	76,830
Mumbai	Asia Pacific	4	68,267
Georgetown	LAMCARIB	5	66,522
Cairo	Middle East	6	51,490
Budapest	LAMCARIB	7	39,452
Ho Chi Minh City	Asia Pacific	8	38,656
Belgrade	Europe	9	35,599
Taipei	Asia Pacific	10	35,067

IATA Traffic History And Forecast



Toronto is the premier choice for expanded Transpacific services between China & Canada

- Toronto outpaces Vancouver in all long haul international markets except Asia...
 - ...however, those dynamics are continuing to change as airlines recognize Pearson strengths
- Toronto's Chinese population is the largest in Canada and forecasted for continued growth

Comparison of Weekly Seats in Similar Nonstop Markets			
Jul-09	Toronto	Vancouver	Toronto Size Comparison to Vancouver
Asia	16,956	23,848	71%
Europe	63,235	16,221	390%
Latin America	21,007	2,170	968%
Total	105,730	45,266	234%

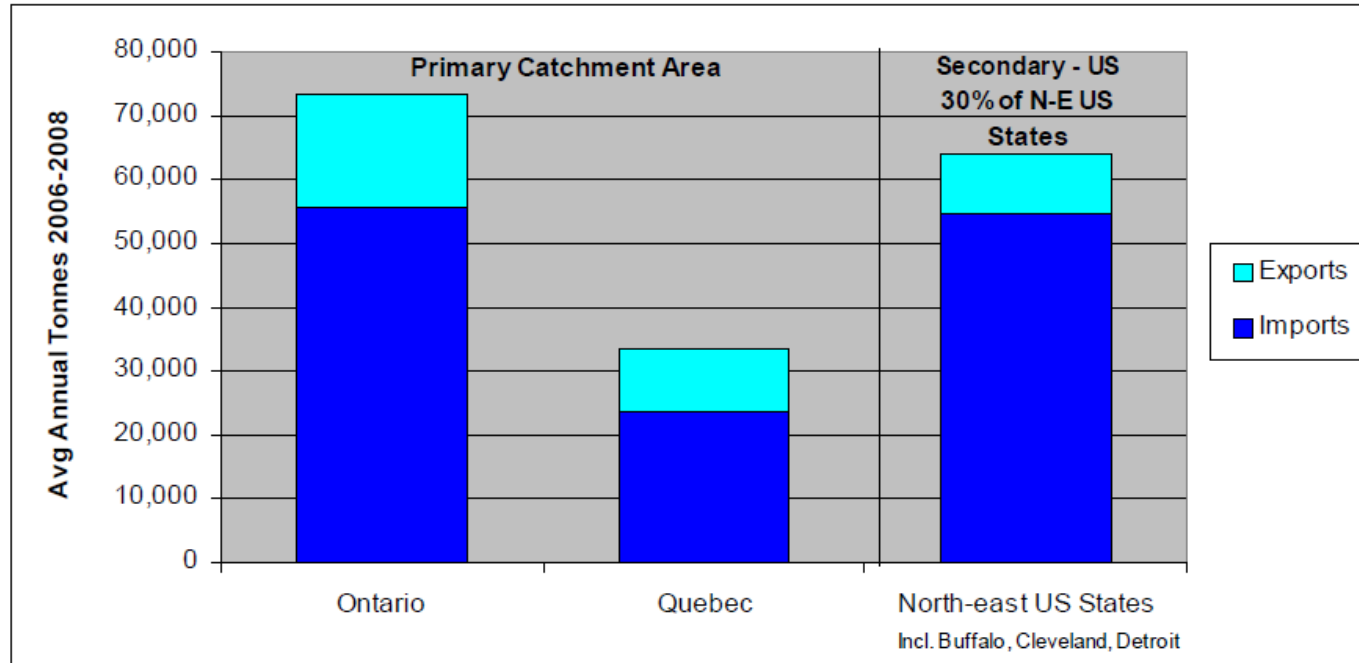
Nov-09	Toronto	Vancouver	Toronto Size Comparison to Vancouver
Asia	15,669	17,133	91%
Europe	39,105	8,003	489%
Latin America	26,491	2,748	964%
Total	84,958	30,532	278%

Chinese Populations		
	2006	2017
Toronto CMA	537,000	735,000
Vancouver CMA	402,000	591,000
Total Population in Canada	1,346,000	1,800,000

Great circle distance (miles)-Connecting Routes				
From/To	via Vancouver	via Toronto	via Chicago	via New York
Beijing-Sao Paulo	12162	11668	11816	11598
Hong Kong-Sao Paulo	13249	12887	13017	12820
Seoul-Sao Paulo	11965	11689	11775	11653
Tokyo-Sao Paulo	11531	11492	11497	11492

Air Trade with Asia

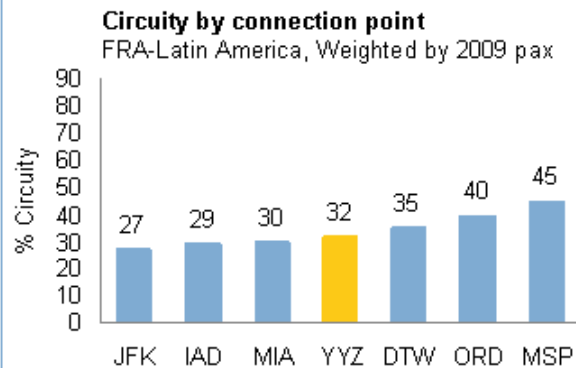
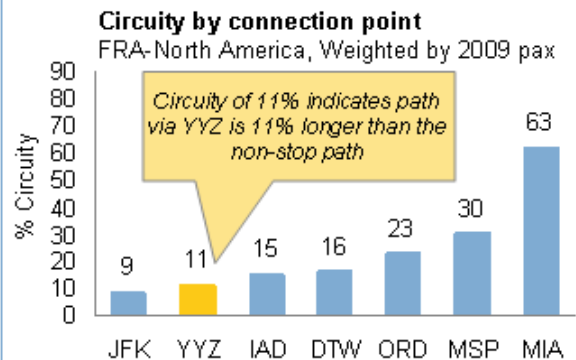
- Toronto Pearson's Catchment Area:



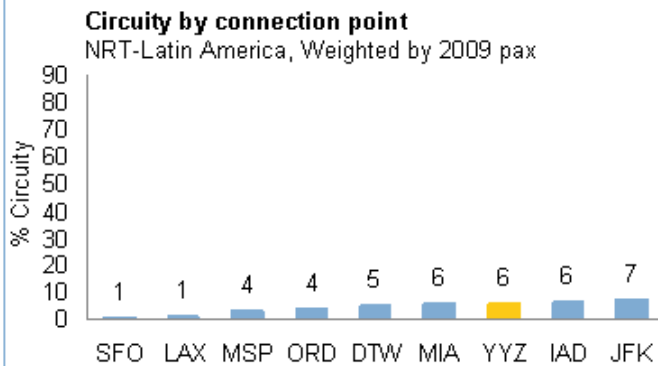
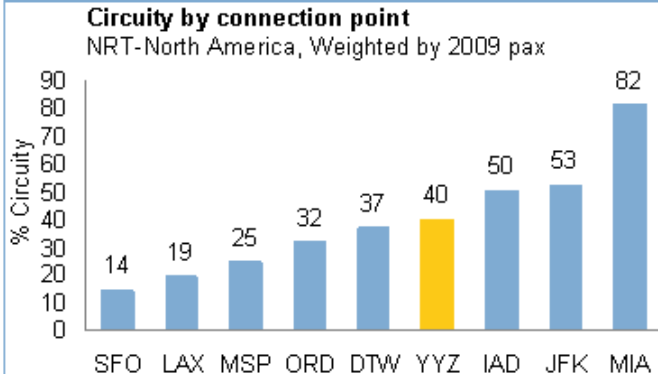
- Total of 107,000 tonnes of Asian air exports & imports from Primary catchment area
- Potential volumes from the North-east US (Buffalo, Detroit & Cleveland) is substantial - capturing 30% of this market would add another 64,000 tonnes of air cargo annually.

Connecting Potential: Toronto Pearson's Geographic Position

FRA to North / Latin America



NRT to North America / Latin America



From a connecting perspective, Toronto Pearson's location is a highly competitive connecting point for flows from Europe and Asia into the Americas

Competitive Advantage: Toronto Pearson

- Building on our existing strengths:
 - Facilities and Infrastructure
 - Operational Capabilities
 - Commercial Strength



Partnering with governments and stakeholder partners on:

1. Recognizing Gateway as Priority
2. Maximizing Capacity
3. Security
4. Passenger Facilitation



Departures | Départs
Terminal Aéroport 17:17

Destination	Time	Flight	Status	Gate
BUENOS AIRES	23:15	AC 092	On Time	178
CARACAS	22:35	AC 073	On Time	172
DELHI	18:40	AC 872	Delayed	171
FRANKFURT	17:10	AC 872	Delayed	170
FRANKFURT	17:30	LH 471	On Time	178
HONGKONG	15:30	AC 1616	On Time	178
LONDON-LHR	18:10	AC 856	Delayed	1710
LONDON-LHR	20:20	AC 849	On Time	178
LONDON-LHR	22:55	AC 856	On Time	173
MEXICO CITY	18:10	AC 991	On Time	179
MILAN	17:25	AZ 653	On Time	170
MONTEGO BAY	12:05	AC 982	Delayed	173
PARIS-CDG	18:40	AC 880	On Time	172
PORT OF SPAIN	22:35	AC 073	On Time	172
ROME	20:30	AC 890	Delayed	2100
SANTIAGO-CHILE	23:15	AC 092	On Time	178
SANTIAGO-CUBA	17:15	969 957	Delayed	1745
BAO PALLO	22:00	AC 080	On Time	173
TEL AVIV	17:00	AC 094	Delayed	1720
ZURICH	18:40	AC 876	Delayed	19:00





Questions?