

# Airport Capacity Constraints and Investment

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# TAV Portfolio of Airports



	Capacity (million Pax)					
Turkey	43.4	Istanbul (100%)	Ankara (100%)	Izmir (100%)	Gazipasa (100%)	
Georgia	3.4	Tbilisi (66%)	Batumi (66%)			
Tunisia	10.5	Monastir (100%)	Enfidha (100%)			
Macedonia	3.1	Skopje (100%)	Ohrid (100%)	Ship (100%)		
Latvia	15.0	Riga (50%)				
EPC (minor company)		Doha 24.0	Cairo T3 11.0	Tripoli 20.0	Sebha 2.5	Muscat 12.0
						Abu Dhabi* 30.0

\* shared

# Integrated Business Model



## Design and Construction

TAV Construction (a later company)



## Airport IT Systems



## Commercial Activities

- ATU (Duty Free)
- BTA (F&B)
- Airport Hotel
- Airline Lounges
- City Bus Service
- Advertisement
- Travel Agency
- Airport Parking



Operational Efficiency  
Customer Focus  
Commercial Focus  
Quick Execution

## Aviation Security

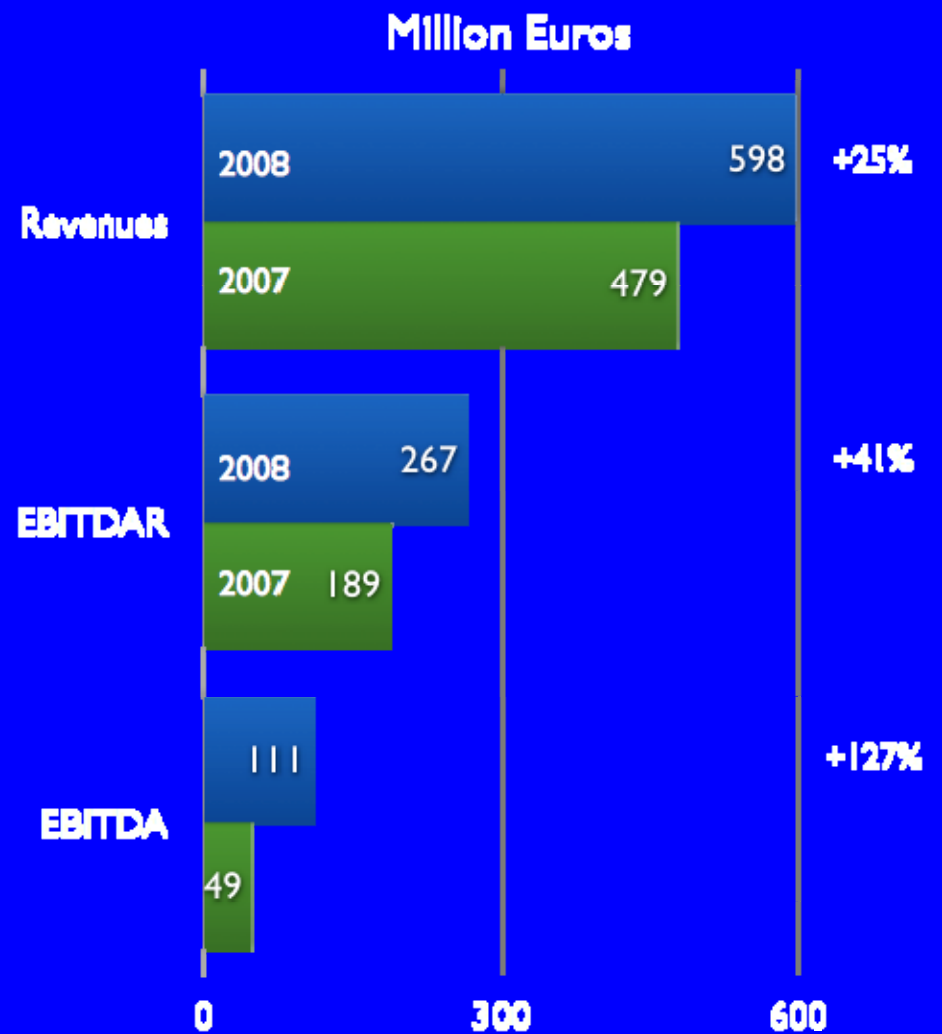
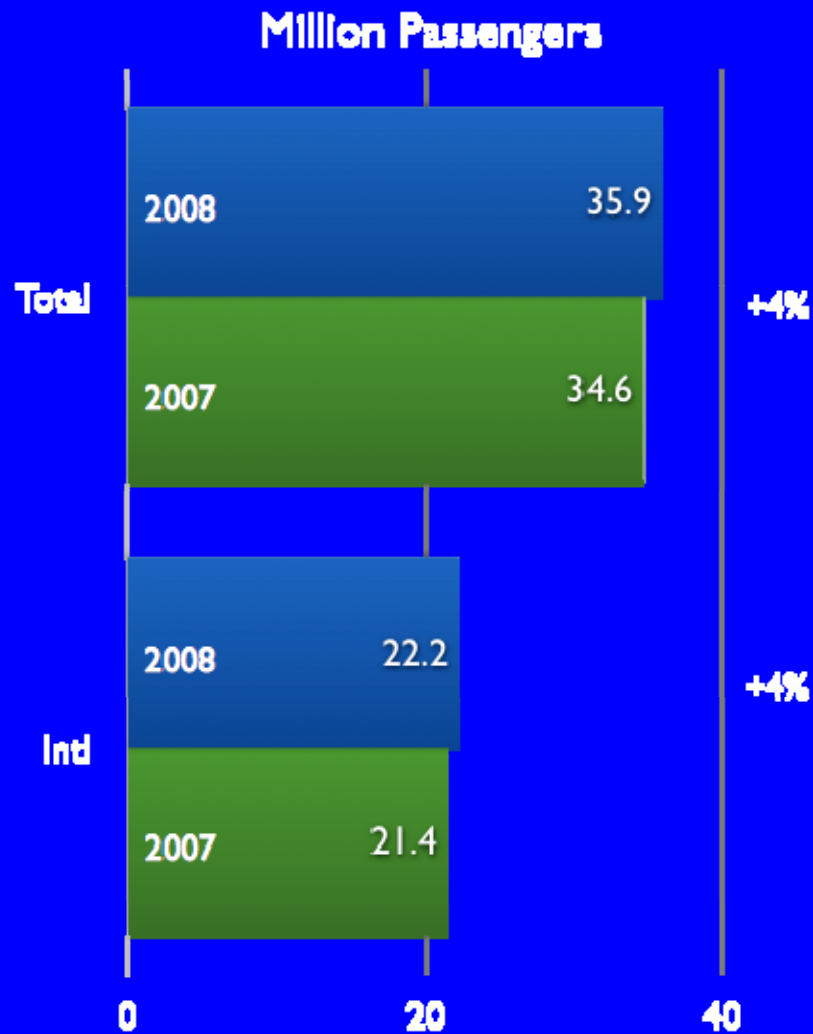


## Management and Operations

- Airports
- Heva (ground handling)
- City Terminal
- Facilities Management



# 2008 Results



# Airport Investments

ACI Europe (2006); Billion Euros

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	Investment
2000 - 2005	€ 7.5 p.a.
2006 - 2010	€ 8.1 p.a.
2011 - 2015	€ 8.5 p.a.
2000 - 2015	€ 120 total



## Challenges of Growth 2008

Summary Report



# Projected Capacity and Demand

million IFR flights per year



	2007 - 2030	Flights or Airports
<b>Capacity</b>	+41%	18.2 <i>to</i> 22.1
<b>Demand</b>	+70% <i>to</i> +120%	20.4 <i>to</i> 29.1
<b>Deficit</b>	11% <i>to</i> 25%	2.3 <i>to</i> 7.0
<b>No. Congested Airports</b> <i>8+ hours per day</i>		19 <i>to</i> 39

## By 2030 .....

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- 19 to 39 European airports will experience *Heathrow-like* congestion more than 8 hours every day.
- This will impact 6,300 to 19,200 daily flights, or 50% to 70% of all flights at those airports.
- Unaccommodated demand will double between 2025 and 2030.