

CMANC Annual Winter Meeting

Seaport vs Airport...What's the Difference?



January 16, 2020

**The busiest commercial
airport in Los Angeles in
the 1930's was...**

...The Port of Los Angeles



Wilmington Catalina Airline

1931-1942; 38,000 flights; 200,000; passengers; zero accidents or injuries

- Deregulation/Rate “Freedom”
- Price Reduction
- Cost Cutting
- Transportation as a Commodity
- Consolidation
- Technology & Efficiencies of Scale
- Infrastructure Tries to Catch Up
- Growth & Escalating Demand
- Rinse & Repeat...

Lost Airlines of the USA













Los Angeles
World Airports

PLANNING & DEVELOPMENT GROUP

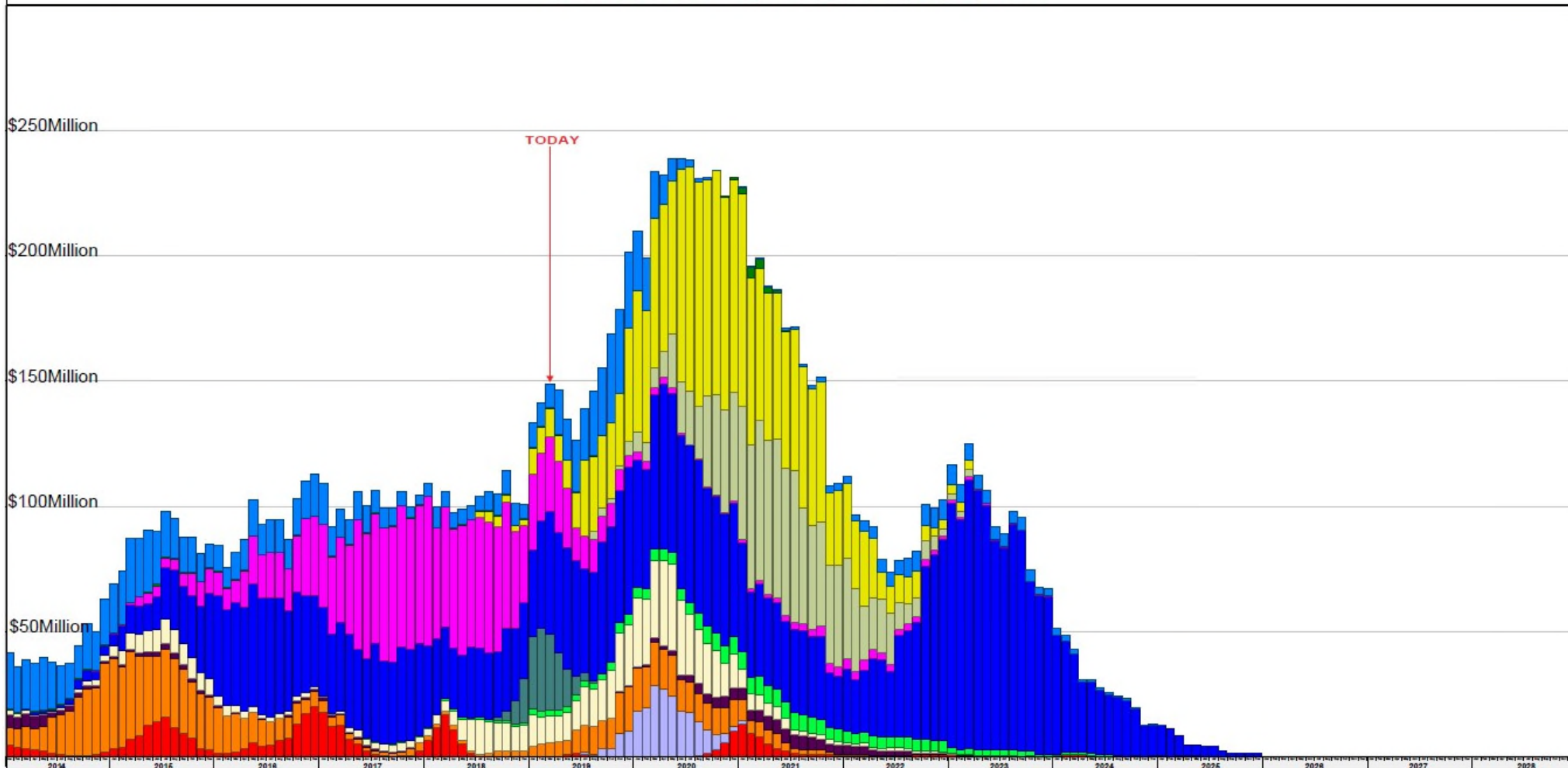






LAX PLANNING & DEVELOPMENT GROUP
LAX MONTHLY HISTOGRAM: PER DEFINED BELL CURVE DISTRIBUTION
BASED ON CONSTRUCTION COST - MARCH 2019

(INTERNAL DRAFT: FOR PLANNING PURPOSES ONLY)



RUN DATE: 15-March-19

LAX PROJECTS ONLY

EAC Construction Cost Shown for Active CIP Projects

Based on CALM LOGISTICAL COORDINATION SCHEDULE

Data Date of 3/15/19

- AIRSIDE
- LAMP - UTILITIES & ENABLING
- AUTOMATED PEOPLE MOVER
- ITF
- LAMP - ROADS
- FTSD
- TERMINALS
- TENANT - BUYBACK (CIP)
- TENANTS
- UTILITIES
- MIDFIELD SATELLITE CONCOURSE - DESIGN & CONST.
- CONSOLIDATED RENT-A-CAR (CONRAC) FACILITY
- LANDSIDE

* Total Project Cost Only

FOR DELIBERATIVE PURPOSES



STAR ALLIANCE
THE WAY THE EARTH CONNECTS



ADRIA

AEGEAN

AIR CANADA

AIR CHINA

AIR NEW ZEALAND

ANA

ASIANA AIRLINES

Austrian

Blue1

bmi

brussels airlines

Continental
Airlines

CROATIA AIRLINES

EGYPTAIR

LOT POLISH AIRLINES

Lufthansa

SAS Scandinavian Airlines

SHANGHAI AIRLINES

SINGAPORE AIRLINES

SOUTH AFRICAN AIRWAYS

Spanair

swiss SWISS

TAM

TAP TAP PORTUGAL

THAI

TURKISH AIRLINES

UNITED

U.S. AIRWAYS



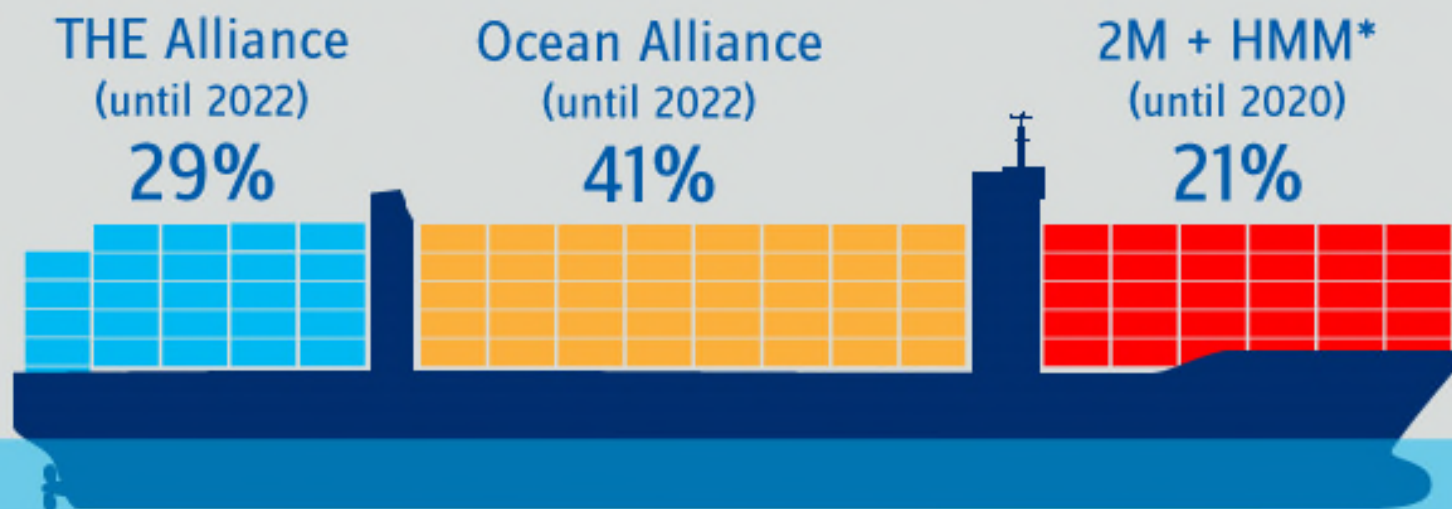
JAPAN AIRLINES





Ocean Alliance to dominate trans-Pacific trade

New alliances take effect in late April



* Original 2M deal between Maersk and MSC in place to 2025.
Final 2M + HMM network yet to be announced

Source: Alphaliner

Container-line consolidation has failed to increase freight rates

in International Shipping News 13/01/2020



The start of a new year is prime time to reflect upon not just the prior year, but the longer-term journey. In the container-shipping sector, a central question is: With all of the ownership consolidation and alliances, has the industry been able to charge more over time to move a container from port A to port B? The answer is no. Mergers may have cut liner costs, but they've yet to provide pricing power.

AIR FRANCE

RETIRES FIRST AIRBUS A380





Container Shipping: Ship Sizes Keep Increasing Despite Stagnant Volume Growth

in International Shipping News 17/09/2019



Global growth in container volumes has picked up slightly in the second quarter of the year, with growth in the first seven months reaching 1.2%, compared to the just 0.8% in the first quarter.

Seaport vs Airport...the Difference is...

***Seaport vs Airport...the Difference is...
...not as great as you might think!***

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Same world...slightly different window.

Best Wishes for Smooth Sailing in 2020!



Los Angeles World Airports