



JAPAN AIRLINES

Japan Airlines Network Strategy

Kiyoto Morioka
December 5, 2019



1. JAL's History
2. JAL's Network & Fleet
3. Partnership between Airlines
4. Medium Term Management Plan
5. Network Plan for 2020
6. Future Plan in North America
7. New Long Haul LCC "ZIPAIR Tokyo"

JAL's History



- 1953** ● Established under the Japan Airlines Act (Act No. 154).
Obtained a license as the sole international scheduled air transportation company.
- 1954** ● Commenced the first scheduled international service, with launching of Tokyo – Honolulu – San Francisco route.
- 1983** ● World's number one passenger and cargo transportation performance according to IATA. (Maintains No.1 in the world for 5 years, until 1987)
- 1987** ● Became full privatization.
- 2004** ● Japan Airlines and Japan Air System changed trading names to Japan Airlines International and Japan Airlines Domestic.
- 2011** ● Changed trading name from Japan Airlines International to Japan Airlines.



JAL's Network



Number of JAL Group Destinations

Total

180

Number of
Domestic Routes

126

Number of
International Routes

54











JAL's Fleet



End of FY17

End of FY20

Total	Total 226 International 85 Domestic 141 (excl. Regional 174)	Total 231 International 92 Domestic 139 (excl. Regional 182)
Int'l	Large 24	Large
	Middle 51	Middle
	Small 10	Small
Domestic	Large 16	Large
	Middle 20	Middle
	Small 53	Small
	Regional 52	Regional
	 777  787 Continue to introduce and three 789s will be added in FY2017.  767  NEW A350 Introducing in FY2019  737 Continue to replace from 737-400 to 737-800  E190 Replace CRJ200 and Q400  NEW ATR42 Start to replace SAAB 340  Q400CC* Continue to replace from DHC8  E170  SAAB340  MRJ Will join FY21 and after	



A350-1000
Introducing in FY2023

Cabin Layout & Seat Product in 777-300ER



**First Class
(JAL SUITE)**



**Business Class
(JAL SKY SUITE)**



**Premium Economy Class
(JAL SKY PREMIUM)**



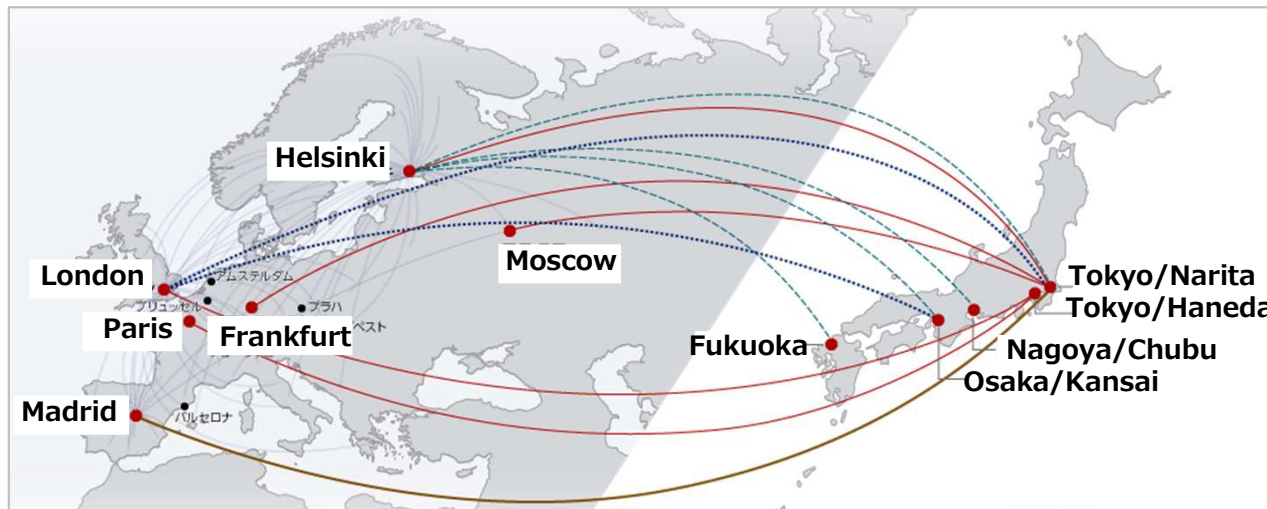
**Economy Class
(JAL SKY WIDER)**



Partnership Between Airlines



Pacific Joint Business



Siberian Joint Business



Now applying new joint business with Hawaiian Airlines to USDOT.



Medium Term Management Plan (2017-2020)



JAPAN AIRLINES

JAL Vision

To customers worldwide, From region to society

Corporate Policy

JAL Vision

Medium Term
Management Plan



To realize the JAL Group Corporate Policy and become
“The world’s most valued and preferred airline”, everyone who supports JAL’s wings
will put in joint efforts to maintain flight safety and to;

1 Transform JAL
into a true global
airline

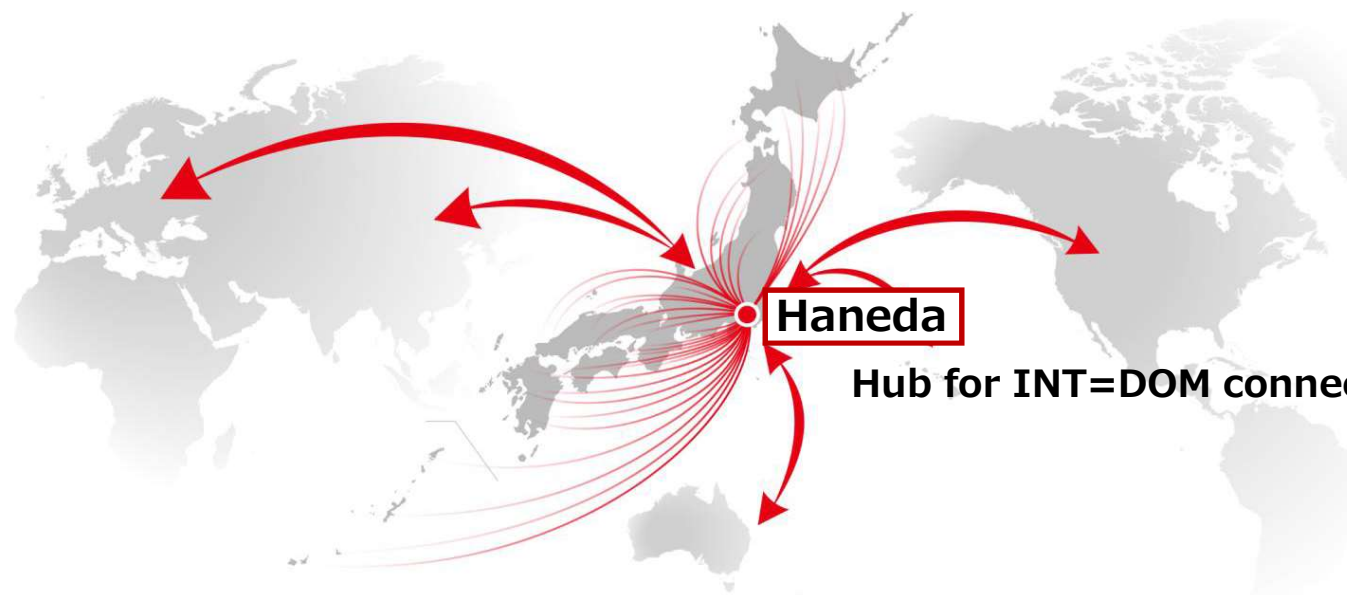


2 Create new values
one step ahead of
competitors



3 Continue
sustainable
growth

Haneda & Narita Dual Hub

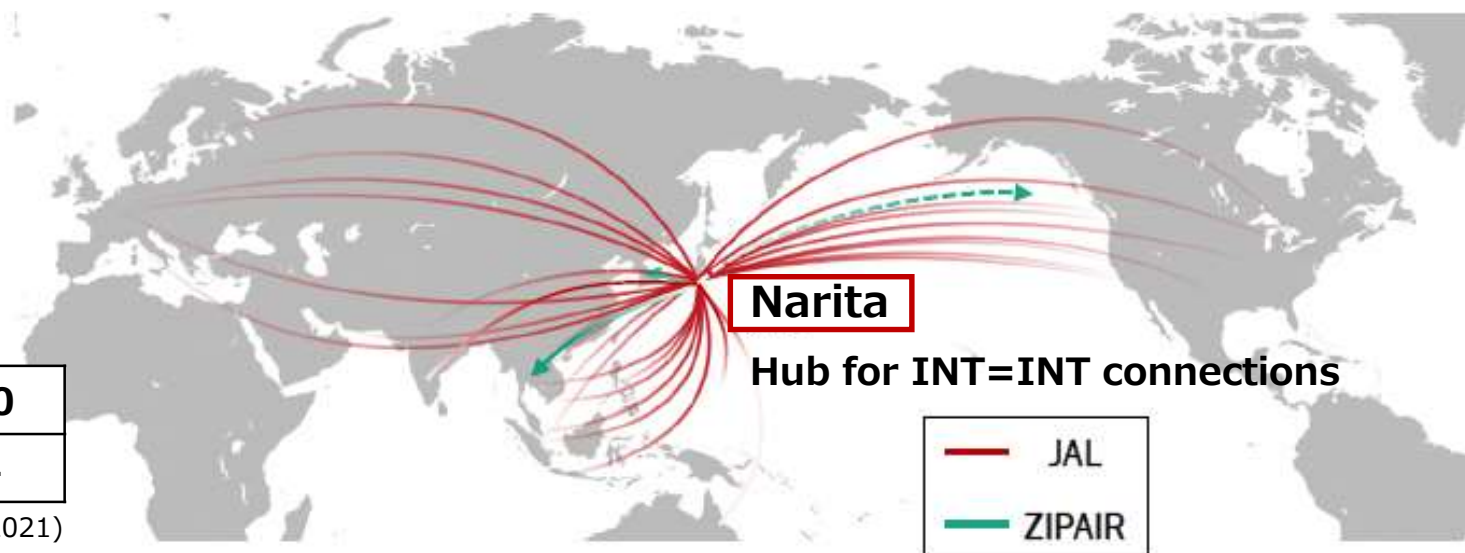


**JAL Destinations
from Haneda**

International	23
Domestic	33

(As of March 2021)

Hub for INT=DOM connections



**JAL Destinations
from Narita**

International	30
Domestic	4

(As of March 2021)

Narita

Hub for INT=INT connections



Haneda & Narita Network Expansion in 2020



Additional Services from 2020

Haneda		
Country	City	Start From
1 2 3 4 5 6 USA	Los Angeles	29MAR 2020
	Chicago	
	New York	
	Dallas	
	Honolulu	
	Honolulu	
7 8 China	Shanghai	
	Dalian	
9 Russia	Moscow	
10 Finland	Helsinki	
11 India	Delhi	
12 Australia	Sydney	

+

Narita		
Country	City	Start From
1 Russia	Vladivostok	28FEB 2020
2 USA	San Francisco	29MAR 2020
3 India	Bangalore	
4 USA	Guam	01JUL 2020
5 Thailand	Bangkok	14MAY 2020
6 Korea	Seoul	01JUL 2020
7 8 9 10	3~5 more flights per day (JAL & ZIPAIR)	

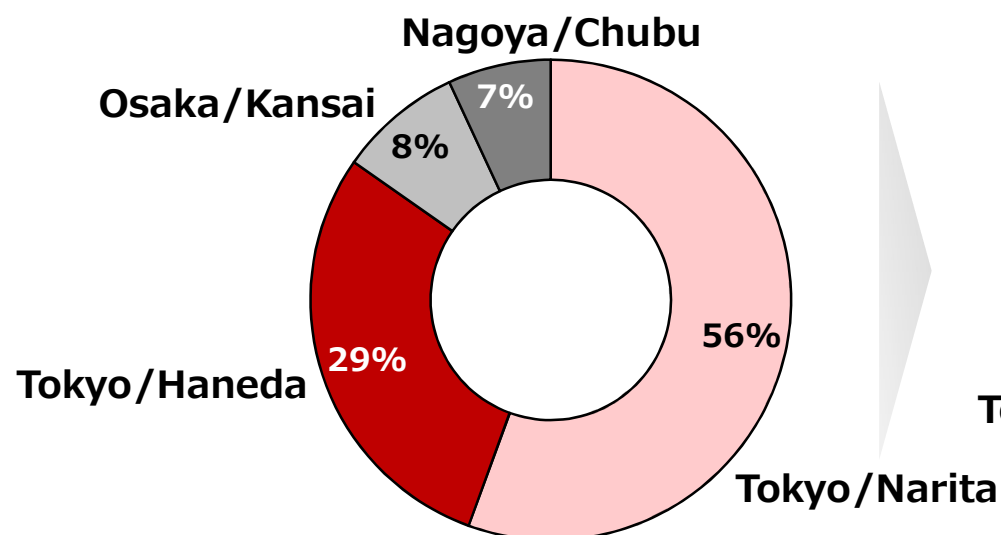
ZIPAIR

Share Change After Network Expansion in 2020



JAPAN AIRLINES

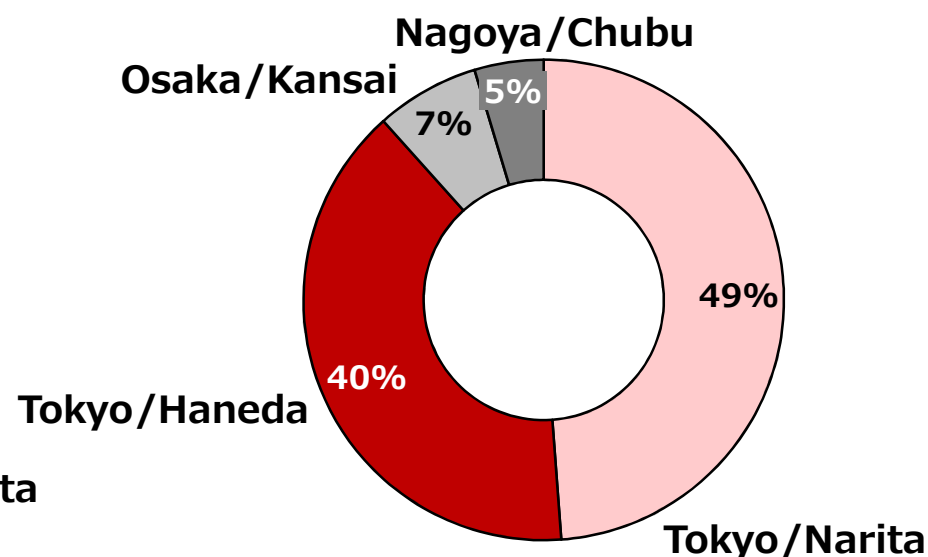
JAL International Flight Number Share in 2019



<JAL Flight Number per week>

Tokyo/Narita	280
Tokyo/Haneda	154
Osaka/Kansai	42
Nagoya/Chubu	35
Total	511

JAL+ZIP International Flight Number Share in 2020





<JAL+ZIP Flight Number per week>

Tokyo/Narita	294
Tokyo/Haneda	238
Osaka/Kansai	42
Nagoya/Chubu	28
Total	602

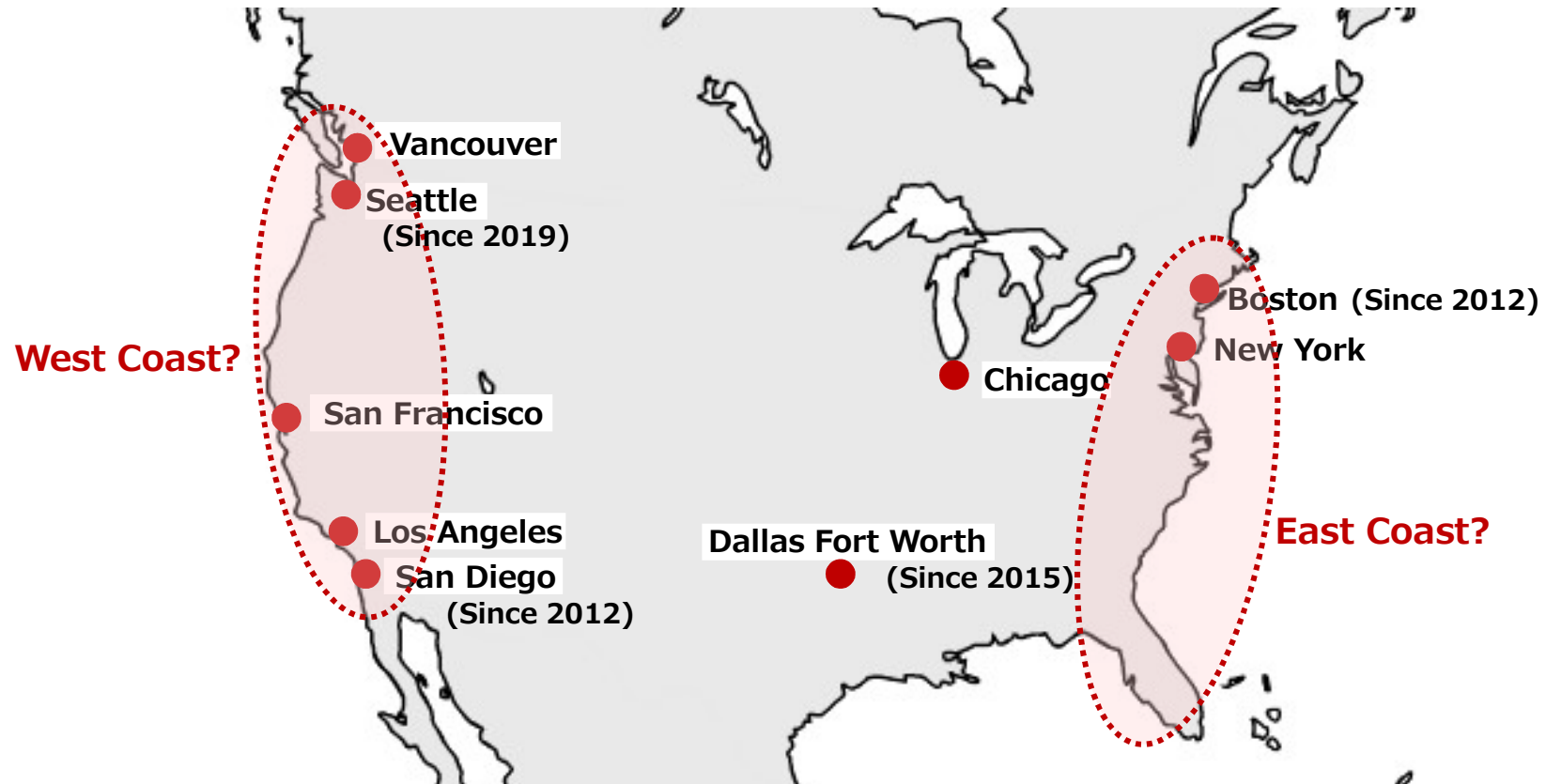
Network to/from USA & Canada



In 2021, Japan Airlines and American Airlines will operate 27 daily services to/from USA & Canada.

	US & CA	Japan	Aircraft		US & CA	Japan	Aircraft
1	New York	Tokyo/HND	777-300ER		15	Boston	Tokyo/NRT
2		Tokyo/HND	777-300ER		16	San Diego	Tokyo/NRT
3	Chicago	Tokyo/HND	777-300ER		17	Seattle	Tokyo/NRT
4		Tokyo/NRT	787-9	15FEB2021-	18	Vancouver	Tokyo/NRT
5	Dallas 	Tokyo/HND	787-9		19	Honolulu	Tokyo/HND
6		Tokyo/HND	777-200ER		20		Tokyo/HND
7		Tokyo/NRT	777-200ER		21		Tokyo/NRT
8	Los Angeles 	Tokyo/HND	777-300ER	29MAR2020-	22		Tokyo/NRT
9		Tokyo/HND	787-8		23		Osaka/KIX
10		Tokyo/HND	787-8	29MAR2020-	24		Nagoya/NGO
11		Tokyo/NRT	787-8		25	Kona	Tokyo/NRT
12	San Francisco	Osaka/KIX	787-9		26	Guam	Tokyo/NRT
13		Tokyo/HND	777-300ER		27		Tokyo/NRT
14		Tokyo/NRT	787-8	29MAR2020-			

Future Plan in North America



- a. Market size to/from Japan
- b. Market size to/from Asia and opportunity to connect via Japan
- c. Behind network by partner airlines

New Long Haul LCC “ZIPAIR Tokyo”



Provide new travel experience with low price and high quality

ZIPAIR



New Long Haul LCC “ZIPAIR Tokyo”



Capital	100% Subsidiary of Japan Airlines
Base	Tokyo/Narita
Aircraft	787-8 (increasing 2 aircrafts per year)
Seat Number	290
Route	Tokyo – Bangkok (from May 2020) Tokyo – Seoul (from July 2020)
Corporate Color	Harmony Gray and Trust Green

Recent Topic

Japan Airlines has received new A350-900 recently this year. The aircraft is deployed to Japan domestic routes such as Tokyo/Haneda – Fukuoka.



Thank you!



JAPAN AIRLINES