

# The Trusted Partner in Global MRO

SIAEC AGM

19 July 2019

# Recap – MRO Landscape

## Challenges

Technological Advancements in New-Generation Fleet



Phasing out of Older Aircraft & Engines



Increased Hangar Capacity in the Region



OEM Competition in the Aftermarket

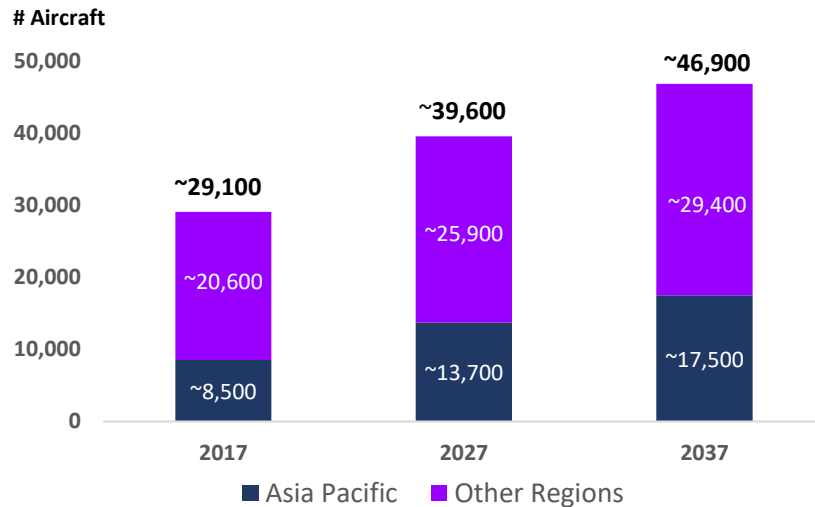


## Opportunities

Global fleet growth is projected to increase by 3.1% per annum

5.0% fleet growth per annum in Asia Pacific

20 Year Global Air Transport Fleet Growth



Source: ICF

# Recap – Company Initiatives



**Innovation and Technology**

**Transformation**

**Strategic Partnerships**

# Innovation & Technology

## Developed an Operations & Technology Capability (OTCR) Roadmap

### Digital Collaboration

Improve information accessibility and enhance connectivity on the go

### Machine Vision

Enable automated inspection, analysis and continuous monitoring;  
Video analytics for safety, security and surveillance

### Smart Control Centre

Industry 4.0: Improve visibility of work processes

### Automation and Robotics

Strengthen ability to optimise operations and conduct all-weather operations

Enhancing Quality  
and Safety



Increasing  
Efficiency



Developing New Products  
and Capabilities



# Transformation

2018

2019

2020

2021

## Transforming for the Future

- Upgrade toolings, facilities and equipment (\$90M)
- Prepare for digital economy (72 percent of total staff completed the SkillsFuture for Digital Workplace training)
- Optimise manpower utilisation and improve turnaround time
- Generate productivity gains and create capacity for growth

# Strengthening Strategic Partnerships

## Forming new partnerships



**nok**scoot

JV incorporated on 10 Jul 2019

- Line Maintenance JV based in Thailand



GE Aviation

- Brilliant Factory to perform engine MRO services for GE90 and GE9X engines

JV pending incorporation

## Developing existing partnerships

**BOEING ASIA PACIFIC  
AVIATION SERVICES**  
PTZ. LTD.

**HMS**  
**HMS SERVICES**  
by SIAEC and AIRBUS

  
**ADDITIVE FLIGHT  
SOLUTIONS**

**MOOG**  
**AIRCRAFT SERVICES ASIA**

SIA ENGINEERING (JAPAN)



New JVs in their gestation period

# JV - Portfolio Overview

## Airframe and Line Maintenance

|  |   |
|--|---|
| SIA Engineering (Japan) (SIAEJ)                        | Heavy Maintenance Singapore Services (HMSS)   |
| Pan Asia Pacific Aviation Services (PAPAS)             | Boeing Asia Pacific Aviation Services (BAPAS) |
| Aviation Partnership (Philippines) (APPC)              | SIA Engineering (Philippines) (SIAEP)         |
| SIA Engineering (USA) (SEUS)                           | Singapore Aero Support Services (SASS)        |
| Southern Airports Aircraft Maintenance Services (SAAM) | PT JAS Aero-Engineering Services (PT JAE)     |
| Line Maintenance Partnership (Thailand) (LMPT)         |   |

## Engine and Component

|  |   |  |   |
|--|---|--|---|
| Component Aerospace Singapore (CAS)    | Turbine Coating Services (TCS)                    | JAMCO Aero Design & Engineering (JADE)             | Fuel Accessory Service Technologies (FAST)          |
| Singapore Aero Engine Services (SAESL) | Asian Surface Technologies (AST)                  | Panasonic Avionics Services Singapore (PACSS)      | Goodrich Aerostructures Service Center-Asia (GASCA) |
| Eagle Services Asia (ESA)              | Safran Landing Systems Services Singapore (SLSSS) | Safran Electronics and Defense Services Asia (SEA) | Aerospace Component Engineering Services (ACES)     |
| Joint venture with GE for GE90/ GE9X   |   | Additive Flight Solutions (AFS)                    | Moog Aircraft Services Asia (MASA)                  |

**25 JVs in 8 countries**  
**Total Revenue in FY18/19: S\$4.62B**

# SIAEC Group

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- SIAEC Group consist of the Company and 25 Joint Ventures
- Operating out of 35 airports in 8 countries
- Total revenue of S\$5.49B in FY18/19



**Thank You**