

Maintenance Program Opportunities for Newer Aircraft



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Demand

- MRO demand to grow at about 6% per annum

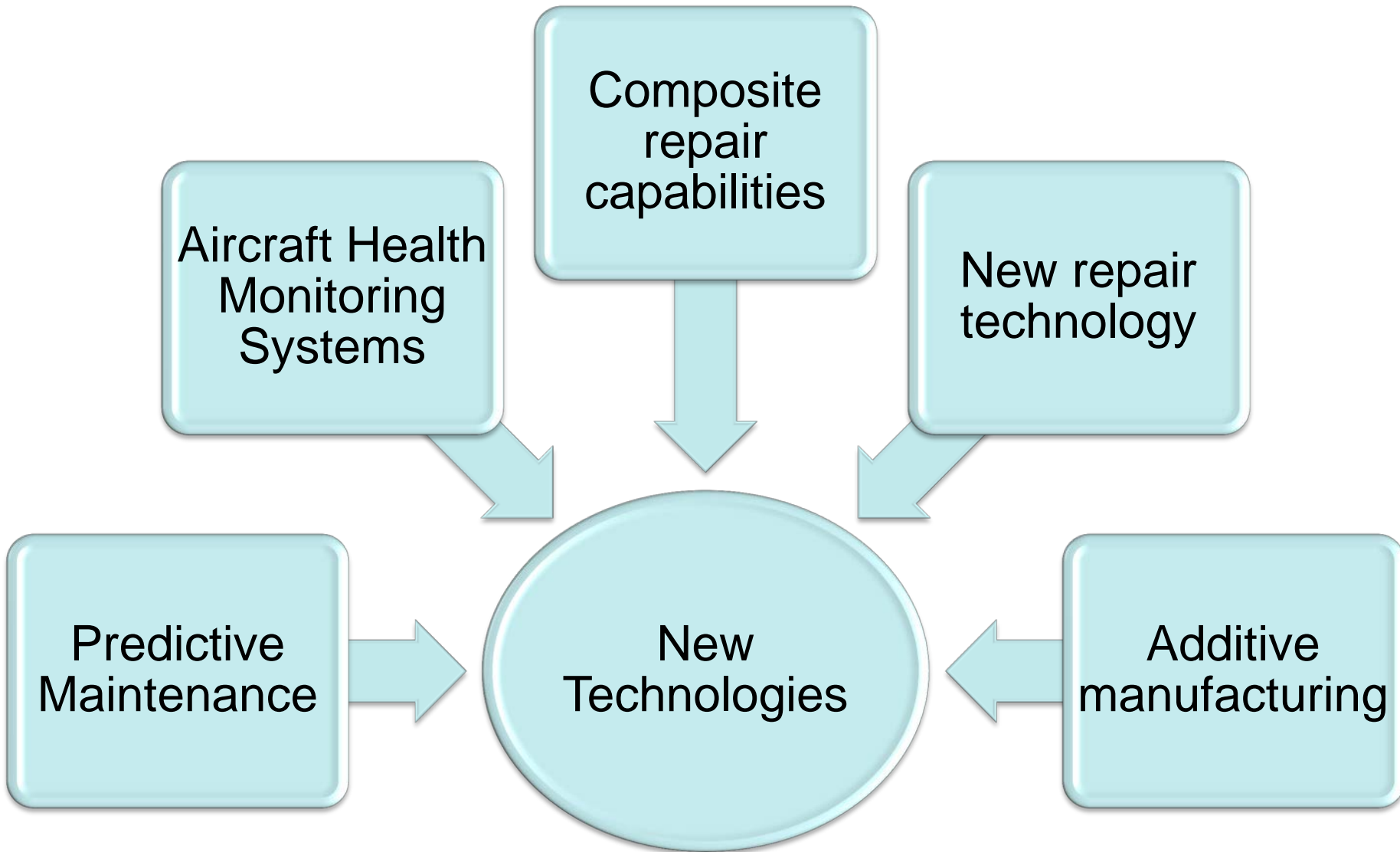
Size

- Market size to grow from ~\$18 B to \$35 B

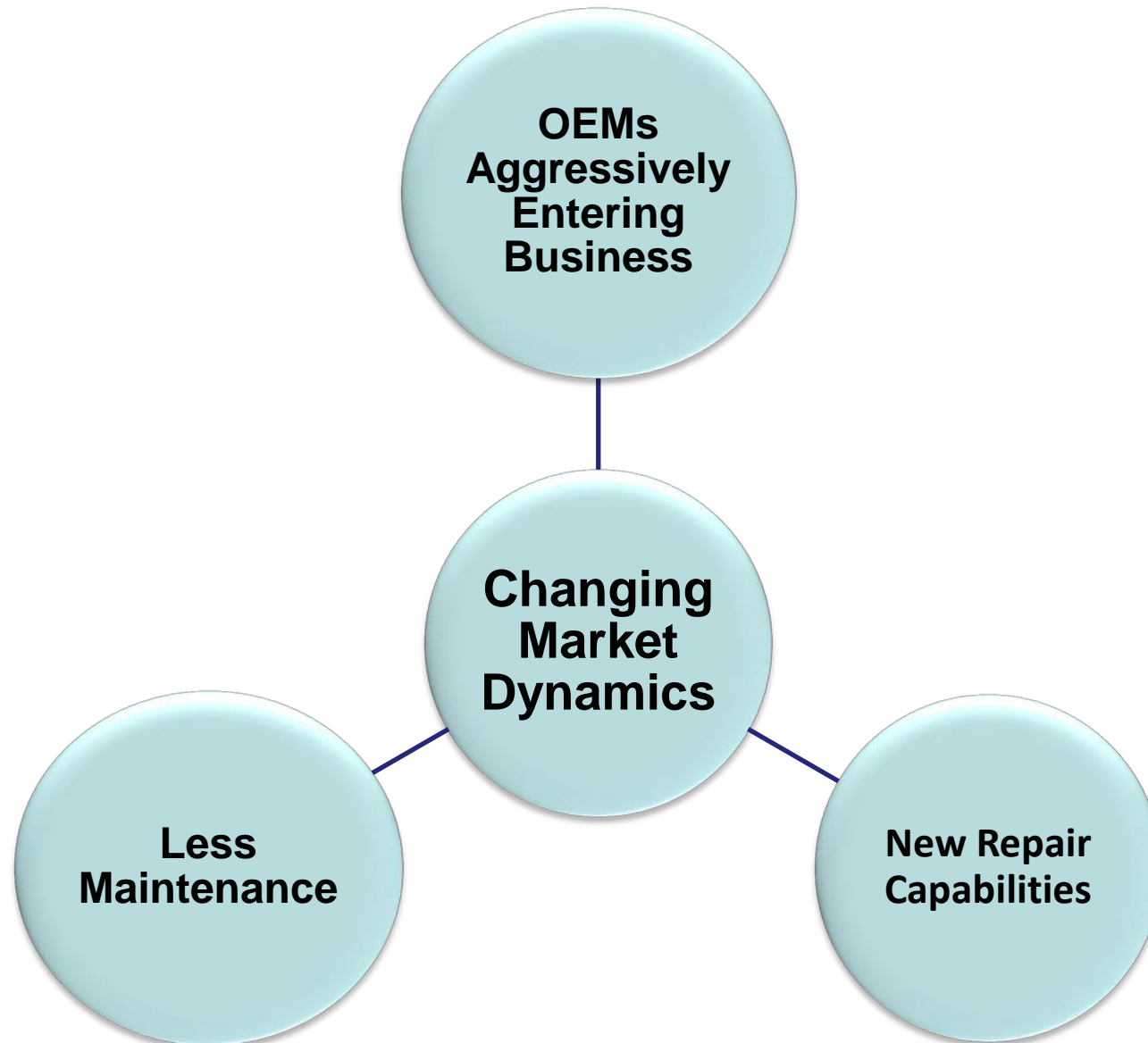
Aircraft

- 5235 Aircraft to be added to ~ current 6800
- APAC will account for 56% of the new aircraft

New Technologies



New Aircraft Will Disrupt MRO Market



Block to phase would mean frequent shorter duration maintenance events

Aircraft scheduling for maintenance will become a complex and challenging task

Aircraft has to visit the hangar more often now

Dynamic Maintenance planning – Data analytics

Optimizing maintenance programs based on in-service data – Regulatory approvals is a challenge

MRO spending could reduce by about 15%

This would redistribute \$10-12 B among current players or new entrants

Access and analysis of data is the key to predictive maintenance.

Integrated MRO solutions providers will be well positioned to meet the challenge

Key Success Factors

- Greater dispatch reliability
- Increased aircraft availability
- Lower maintenance cost
- Increased use of data analytics

Challenges For MROs

Skills

- Training
- Recruitment
- Licensing
- ***Manpower costs will go up***

Tools & Equipment

- Investment in New Tools & Equipment
- Capital Expenditure goes up
- ***Return On Investment over a long term***

Data Analytics

- ***Control of Operating Data*** is critical to success in market participation for design and reliability improvement.
- ***Control of the Workscope*** is critical to success in driving parts choice and margins

Innovation is the Key

New business models – commercial practices

Will base and line maintenance be redefined ?

Identify new opportunities

Operators and MROs should collaborate to develop capabilities

Exploit Vs Explore : Opportunity for ***strategic relationship between MRO and Operators*** as against transactional

New competitors

GMR AERO TECHNIC LIMITED PROFILE



HANGARS:



- 1 Wide body Hangar for A330, B777
- 1 Narrow body hangar for B737, A320, ATR, Q400
- 1 Dedicated narrow body paint hangar
- Maintenance on 5 NB aircraft simultaneously

WORKSHOPS:



- NDT
- Structures
- Composite
- Seat
- Paint shop
- Heat Exchanger
- Carpet & upholstery
- Flight controls
- Oxygen
- Machine shop
- Cables & Pipes
- Heat Treatment
- Welding
- Battery
- Galley

CUSTOMERS:



FLY SMART



JET AIRWAYS

IndiGo



truJet

AirAsia

Golden Myanmar Airlines



flynas
طيران ناس

BRITISH AIRWAYS



طيران الخليج
Gulf Air



GE Capital
Aviation Services

AWAS

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THANK YOU