

(Tentative translation)

Kansai Aircraft Industry Platform NEXT

Action plan to build a strong and stable aircraft industry in ten years' time (2024 business plan)

April 23, 2024

Kansai Economic Federation
The New Industry Research Organization
METI-Kansai

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0. About Us

This platform brings together major companies, medium-sized and small enterprises, industrial support organizations, financial institutions, research institutions, universities and local authorities in the Kansai region with the aim of making the aircraft industry one of the pillars of next-generation industry in the Kansai region.

METI-Kansai (the government), Kansai Economic Federation (the business community) and the New Industry Creation Research Organization (the support organization) act as the secretariat and work closely with major companies and SMEs in the Kansai region to support the maintenance and development of the aircraft industry.

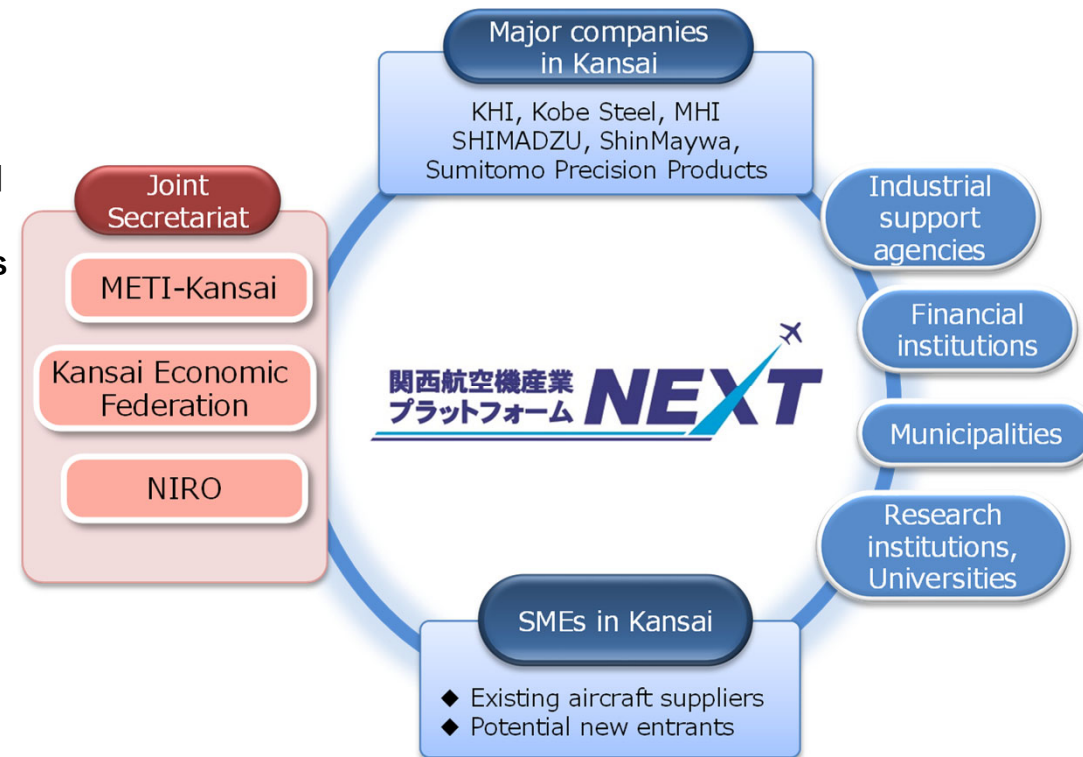
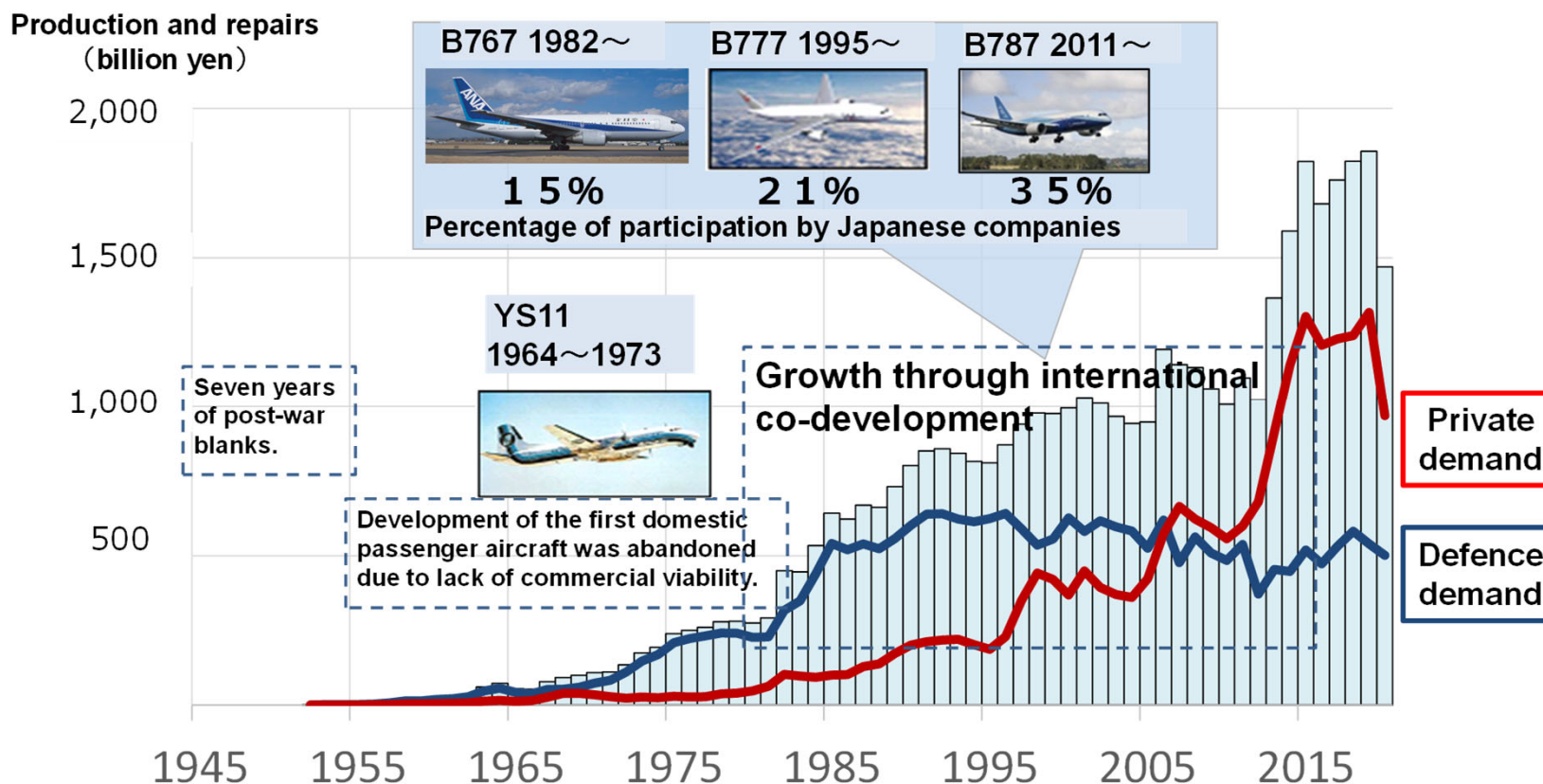


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1-(1). Review of the History of the Aircraft Industry and Initiatives in the Kansai Region

JAPAN



Source: METI-Kansai data from Aerospace Industry Subcommittee

KANSAI

1.0

Kansai International Aircraft Market Entry Support Project (2009-2015) - Towards the acquisition of new SCs - Exploring integrated production models to meet growing demand and to secure new players.

2.0

Kansai Aircraft Industry Platform (2016-2018) - Focused on strengthening of Supply Chain capacity building - To strengthen core company and core SC focus by joining forces with Tier 1.

3.0

Kansai Aircraft Industry Platform NEXT (2019-) - Increase the number of change- and challenge-oriented companies. - Update on aircraft component companies that will still be strong and stable SCs in ten years' time.

1-(2). Our Mission



- Mission 2022-202X -

Companies that are resilient to change and tirelessly take on challenges, aiming to become centers of excellence for new technologies and supporting strong and stable SCs in ten years' time.

In order to increase the number of such companies, Kansai Aircraft Industry Platform NEXT delivers information, provides opportunities to take challenges, and connects challengers.

1-(3). Thoughts on the Mission



- Mission 2022-202X -

The aircraft industry is a growth industry. This is undeniable, and indeed the commercial aircraft market has expanded significantly in the last decade. This growth industry has also been exposed to business risks due to the COVID-19 pandemic.

In the medium to long term, demand for aircraft is expected to increase further. It is important for Japan to continue to enjoy the fruits of this growth and make the aircraft industry stronger and broader.

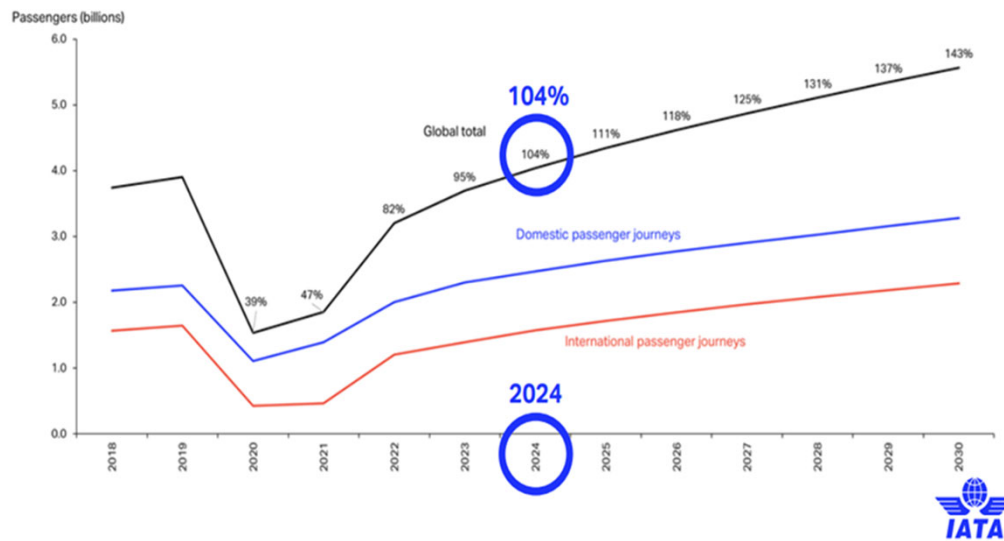
The Kansai Aircraft Industry Platform NEXT wants to support the sustainable growth and challenges of each and every company in the supply chain. The public and private sectors will work together with this in mind to promote initiatives.

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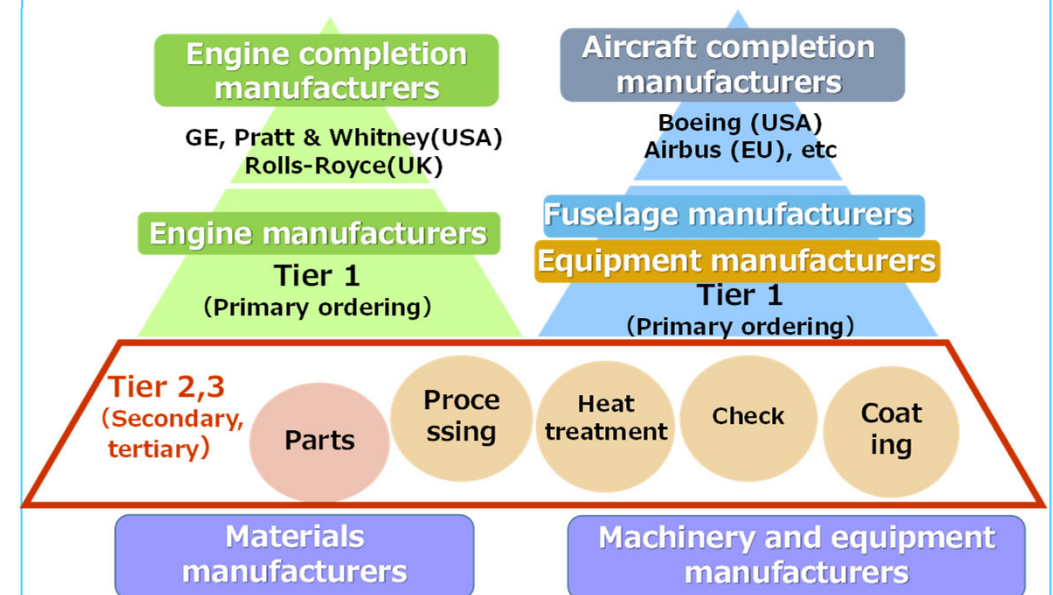
2-(1). Direction for the Year 2024

The environment surrounding the industry has continued to change even after the mission of the Kansai Aircraft Industry Platform NEXT was redefined in 2022. Passenger demand, which bottomed out after the COVID-19 pandemic, is expected to return to pre-COVID-19 levels in 2024, and aircraft demand is also recovering, particularly for small and medium-sized aircraft. In addition, further opportunities to meet the challenges of carbon neutrality, synergies with flying cars and space-related industries, and the expansion of business in other countries driven by the revitalization of international traffic are expected to increase.



Passenger traffic forecast by IATA
Source: Economic Outlook: Air Transport in Times of Turbulence

In order for companies in the aircraft industry to seize such opportunities and enjoy the fruits of growth, the key is to improve production capacity through the recruitment and development of human resources throughout the supply chain and thus establish core competence. Therefore, in FY2024, the Platform will actively disseminate information through trade fairs while also focusing on the new theme of human resource development and exchange.



Supply chain structure of the aircraft industry
Source: NIRO

2-(2). Action Plan – Insight (Dissemination of Information) -

Insight

Timely information on administrative measures that can be utilized by the industry through seminars on the latest trends in the aircraft industry.

Dissemination of information on administrative measures

Information on company support measures and exhibitions implemented by METI is disseminated on a regular basis. Briefing sessions are organized to inform participants about measures of particular note in an easy-to-understand manner.

Latest trends seminars

Seminars covering aircraft-related technologies towards carbon neutrality, the latest trends in hydrogen aircraft and air mobility, and DX.

Exhibiting at trade shows (New!)

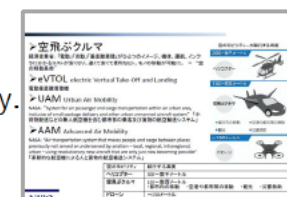
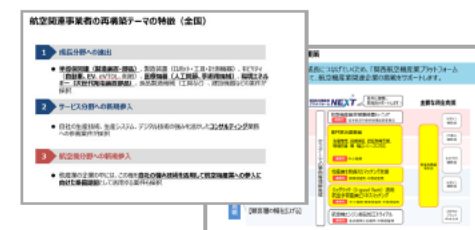
Booths at the Engine Forum Kobe, the International Frontier Industry Messe and the International Aerospace Exhibition, as well as participation in the accompanying events, will strengthen the supply chain in the Kansai region and disseminate the latest policy information.

Dissemination of information on non-destructive testing

In cooperation with Aviation Industry Non-Destructive Testing Training Centre and NANDTB-Japan, case studies and course information from companies that have taken courses on non-destructive testing in the aircraft industry will be presented.

Dissemination of industry information

Regular emails are sent out giving the latest information on the aircraft industry. Expert reports are sent out for community members.



2-(4). Action Plan - Connect (Promotion of Exchange) -

Connect

While connecting companies that strongly support the aircraft industry, we provide more industry-specific information, disseminate company information on our website, and provide opportunities for study sessions and self-improvement.

Kansai Aircraft Industry Community

The community, which was newly established in FY2022, provides companies in the aircraft industry with more core information sharing and matching opportunities, such as delivering comprehensive information on government policies, distributing as appropriate industry trend reports created by staff with long industry experience, and organizing cross-regional exchange seminars among members.



Other regional exchanges

Exchange meetings will be held in a pilot community (ATOTSUGI no Kai) launched in FY2022 to provide opportunities for the creation of cross-regional horizontal links and learning for the future for managers and executive candidates who will lead Japan's aircraft industry in ten years' time.



Disseminating useful information from the website

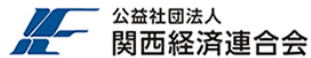
The Kansai Aircraft Industry Platform NEXT website provides useful information for everyone, including seminars.



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