Aeroporto di Bologna

CARGO PRESENTATION

2021

BLQ OVERVIEW

BLQ key facts

9.5 MILLION PASSENGERS (PRE-COVID)

CARGO: 56.132 TONS (PRE-COVID)

24H OPERATIONS

NO SLOT CONSTRAINTS

3 HANDLING AGENTS

32 APRONS

ILS 12:CAT III B
ILS 30:CAT I

DEDICATED GENERAL AVIATION TERMINAL

BENCHMARKING IN ITALY AND EUROPE: AN OUTSTANDING WEALTHY AREA

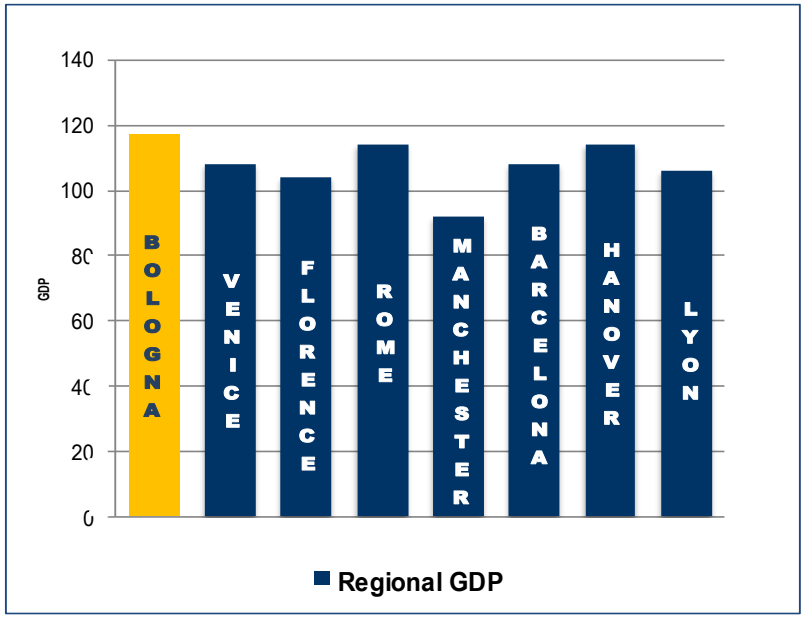
BOLOGNA IS LOCATED …

- **IN THE CENTRE OF ONE OF EUROPE'S MOST FLOURISHING MARKETS**:
  GDP PER CAPITA: Europe: USD 33.100 – Italy: USD 35.200 - Emilia Romagna (Bologna): USD 43.100

- **IN THE HEART OF ITALY'S MOST IMPORTANT AREA IN TERMIS OF SOCIO-ECONOMIC DEVELOPMENT**

BOLOGNA CATCHEMENT AREA

BOLOGNA HAS HIGHER GDP THAN NATIONAL LEVEL AND FOREIGN SIMILAR CITIES



Source: (GDP) Eurostat last release: 26 February 2016, referring to YEAR 2014, index EU28=100

- *Bologna is an opportunity to do business in comparison to similar areas in EU*
- *Home to numerous leading international companies (ceramics, motors, food and industrial machinery industries)*
- *Approx. 47,000 companies operating in key factors with export at €26.2 bn.s*

INDUSTRIAL DISTRICTS WHERE WORLDWIDE BRANDS LIVE

Barilla
CARPIGIANI
PARMIGIANO REGGIANO
parmalat
PARMA
Tetra Pak

roberto cavalli
sergio rossi
GUCCI
Salvatore Ferragamo
LA PERLA
TOD'S
LIU·JO
FURLA

MASERATI
Ferrari
LAMBORGHINI
DUCATI

IMA SPA
Sharing Passions
POZZI-GINORI
DATALOGIC
FAAC
FERRETTI YACHTS
TECHNOGYM
The Wellness Company™

4TH LARGEST EXHIBITIONS' DISTRICT AREA IN EUROPE

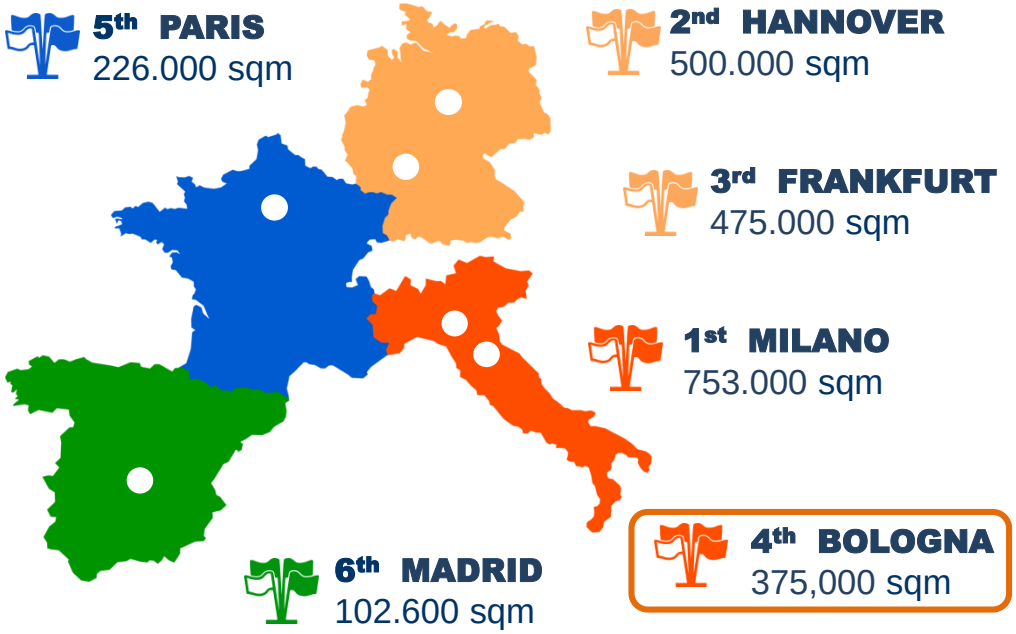
Bologna Fiere is the venue of 30 international exhibitions every year

Bologna Fiere

Italy's second largest Trade Fair Centre

- **1.700.000** visitors
- **13.337** exhibitors, over **36%** foreigners
- **375.000** sqm of total surface area
- **14.500** parking spaces

MAIN EUROPEAN FAIR CENTRES:



Source: http://www.bolognafiere.it/en/home

BOLOGNA, AT THE CENTRE OF THE SO CALLED “MOTOR VALLEY”

Motorbikes and supercars fan heaven is just close by

LAMBORGHINI FOLLOW ME CARS : THE NEW AMAZING VIDEO ON LINE

YouTube

LAMBORGHINI FOLLOW-ME CAR
the new amazing video!
65.000 CLICKS

https://www.youtube.com/watch?v=dSEpUEs-azg

PAGANI SUPERCAR FLIES FROM DUBAI TO BLQ

YouTube

Pagani Supercar flies to BLQ
80.000 CLICKS

https://www.youtube.com/watch?v=q7JJnCAzJx8

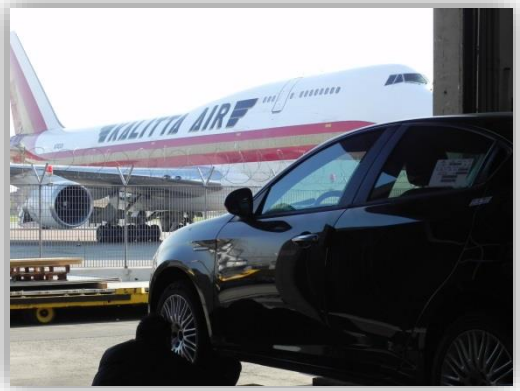
MOTO GP AND FERRARI PROTOTYPE TRANSFERS (2014)

MOTO GP MISANO:
INDIANAPOLIS-BOLOGNA: 4 B767 IN 24 HOURS MANAGED BY BLQ STAFF FOR EQUIPMENT AND SAFETY CARS

FERRARI MOTOR SPORT:
FERRARI AND RED BULL PROTOTYPES TRANSFERS FROM BLQ TO BAHRAIN FOR CHAMPIONSHIP FORMULA 1 TESTS (2014)

KALITTA FLIGHTS FROM BLQ TO NEW YORK

IN 2011 WE MANAGED HANDLING SERVICE FOR CARS EXPORT TO USA: 14 B747 IN 7 MONTHS, 20 CARS IN EXPORT PER FLIGHT (FERRARI E ALFA ROMEO), FOR A TOTAL AMOUNT OF 400.000 KG



GUMBALL 3000: A ROAD TRIP RALLY …

…DEDICATED TO THE CELEBRITIES WITH A PASSION FOR LUXURY CARS

2018: GUMBALL 3000 AT BLQ
It's the 20th Gumball 3000 Rally from 4 - 12 August 2018

Started in 1999, the Gumball 3000 Rally is an annual luxury automotive road trip taking place every year and travelling a different 3000 mile route. Drive through capital cities in front of hundreds of thousands of fans and photographers as Gumball shuts down famous landmarks in each city where spectacular static car displays are hosted and documented by the world's press. Check into the most exclusive hotels before you're whisked off to one of the infamous Gumball parties.

Every year we open the grid for new entrants to drive alongside VIP celebrities, alumni and international royalty. For your chance to become part of Gumball history, use the form below.

GUMBALL 3000: 4-12 AUGUST 2018

IN 2018 FROM LONDON TO OSAKA VIA MARANELLO…..

GUMBALL JAPAN PROMO V3.mp4

BOLOGNA AIRPORT HAS HOSTED THE PASSENGERS EVENT AND HANDLED ALL THE CARS TO OSAKA….

GUMBALLmp4

SPECIAL CARGO AT BLQ: SMOOTH AND FAST OPERATIONS

2017 : EXPORT OPERATIONS DEDICATED TO IQOS PRODUCTS (PHILIP MORRIS)

4.9 TONS OF IQOS : 32 WOODEN SKEDS (IQOS)*– 3/4 TIMES A WEEK (5PMC POSITIONS)

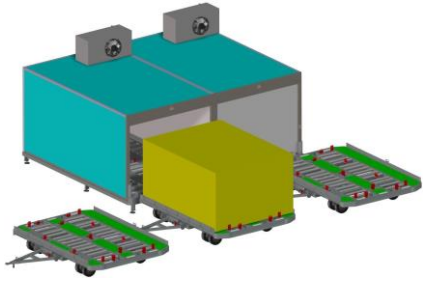
**IQOS: PHILIPP MORRIS SMOKELESS CIGARETTES*

2 LUXURY CARS - EVERY DAY (4 PMC POSITIONS) WITH EMIRATES SKY CARGO AND LH

(250 LUXURY CARS EVERY YEAR, ON AVERAGE)

FASHION IMPORT AND PARFUMS EXPORT

PERISHABLES *(2.2 TONS EVERY YEAR, ON AVERAGE)*:
Temperature controlled storage and variable temperature (+4 °to -20 °)



2020: 110 ALL CARGO FLIGHT OPERATIONS

IMPORT OPERATIONS FOR PANDEMIC NEEDS (3.3 TONS)

4 TH-RANKED ITALIAN CARGO AIRPORT FOR VOLUMES IN 2020 AND 3-RD in JAN-JUNE 2021

The Italian market in 2020 decreases more than BLQ: -23.3% vs -11.2%

CARGO 2020											
N.	AIRPORT	CARGO AVIATION	%	CARGO BY TRUCK	%	CARGO	%	MAIL	%	CARGO AND MAIL	%
1	Milano Malpensa	511.292	-6,2	n/a	n/a	511.292	-6,2	5.447	-59,7	516.740	-7,5
2	Roma Fiumicino	70.908	-62,0	n/a	n/a	70.908	-62,0	5.359	-33,3	76.266	-60,8
3	Bergamo	51.531	-56,7	12	-32,8	51.543	-56,7	0	n/a	51.543	-56,7
4	**Bologna**	**34.674**	**-8,8**	**8.704**	**-19,3**	**43.378**	**-11,1**	**0**	**-98,7**	**43.378**	**-11,2**
5	Venezia	37.120	-36,9	3.988	-21,2	41.108	-35,7	26	-53,7	41.135	-35,7
6	Brescia	7.953	156,1	1.236	-78,1	9.189	5,0	30.045	36,9	39.234	27,8
7	Roma Ciampino	19.324	5,0	n/a	n/a	19.324	5,0	64	62,2	19.388	5,1
8	Pisa	12.811	1,0	153	-40,1	12.964	0,2	32	-47,8	12.996	-0,1
9	Napoli	7.257	-16,1	801	-55,5	8.057	-22,9	1.396	7,3	9.454	-19,5
10	Ancona	5.571	-19,8	11	-85,9	5.581	-20,5	0	n/a	5.581	-20,5
	OTHERS	*10.106*	*- 46,50*	*2.272*	*-65,4*	*12.378*	*-51,4*	*13.809*	*15,6*	*26.187*	*-30,0*
	TOT. ITALIAN APT	***768.547***	***-24,4***	***17.177***	***-43,0***	***785.724***	***-24,9***	***56.178***	***-1,3***	***841.902***	***-23,7***

CARGO JANUARY-JUNE 2021											
N.	AIRPORT	primo sem	%	CARGO BY TRUCK	%	CARGO	%	MAIL	%	CARGO AND MAIL	%
1	Milano Malpensa	356.786	61,1	0	n/a	356.786	61,1	2.690	-3,9	359.476	60,3
2	Roma Fiumicino	44.259	21,6	0	n/a	44.259	21,6	2.941	9,9	47.201	20,8
3	**Bologna**	**18.444**	**17,4**	**5.377**	**25,8**	**23.821**	**19,2**	**0**	**-100**	**23.821**	**19,2**
4	Venezia	17.945	-2,8	1.760	-10,5	19.705	-3,5	8	-69	19.713	-3,6
5	Brescia	7.014	389,5	0	-100,0	7.014	162,8	12.282	-5,3	19.296	23,4
6	Bergamo	13.737	-58,8	7	-25,9	13.744	-58,8	0	n/a	13.744	-58,8
7	Roma Ciampino	8.100	-7,9	0	n/a	8.100	-7,9	67	170,6	8.166	-7,4
8	Pisa	6.986	16,5	74	-22,6	7.060	15,9	0	-99,9	7.060	15,7
9	Napoli	4.437	35,4	344	-17,3	4.781	29,5	695	4,9	5.477	25,7
10	Catania	1.759	209,3	0	n/a	1.759	209,3	1.539	-13,8	3.297	40,1
11	Ancona	3.239	30,7	2	-80,8	3.241	30,3	0	n/a	3.241	30,3
	OTHERS	5.244		1.288		6.532		4.865		11.397	
	TOTAL ITALIAN APT	**487.949**	***38,2***	**8.851**	***-9,9***	**496.801**	***36,9***	**25.087**	***-1,3***	**521.888**	***34,4***

BREAK DOWN BY PLAYERS AND SHARES IN 2020

Thanks to EK, the combi flights share at BLQ grows from 15% to 18% in 2017

…IN 2020 COVID CHANGED THE BLQ CARGO OVERVIEW

COMBI FLIGHTS

5%

Pax and Cargo

-72%

2019-2020

Lufthansa, TAP Portugal, Iberia, Alitalia, Air France, SAS, British Airways, Royal Air Maroc, brussels airlines, Turkish Airlines, Emirates

ALL CARGO

10%

+600%

2019-2020

NCA Nippon Cargo Airlines 日本貨物航空株式会社, time:matters A company of Lufthansa Cargo, cargolux, Atlas Air Worldwide Holdings

110 ALL CARGO FLIGHTS IN 2020, thanks to 3.2 Mil. KG of goods for pandemic needs

TRUCK

20%

-19%

2019-2020

COURIER

-3%

2019-2020

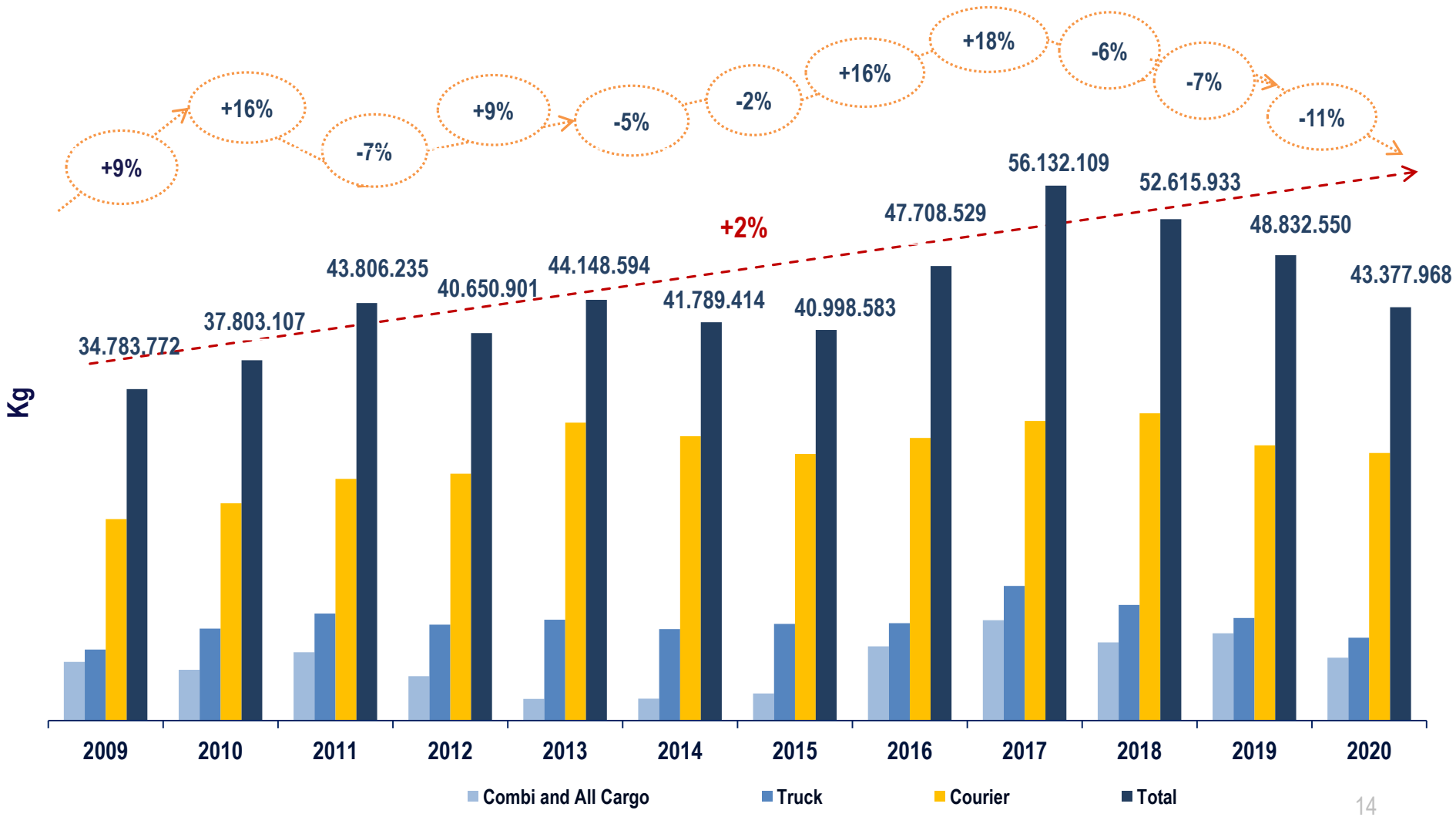
65%

TNT sure we can, UPS, DHL Express

***NOTE**: ALL THE COURIERS ARE IN SELF SERVICE IN BLQ*

BLQ CARGO TRAFFIC 2009-2020: +2% MEDIUM ANNUAL GROWTH vs -11.2% YOY

LEGENDA: CAGR = Compounded Annual Growth rate , indicates Medium Annual Growth



A NEW TERMINAL CARGO IN 10 YEARS, WITH ALL THE FACILITIES

Dedicated road for handling services, Customs pass and security gate

AS IS

Terminal Cargo in the East area of the airport

Courier area in the West side of the airport

TO BE

THE NEW CARGO CITY

All the operators will be in the same area: couriers, freighters, customs, freight forwarders

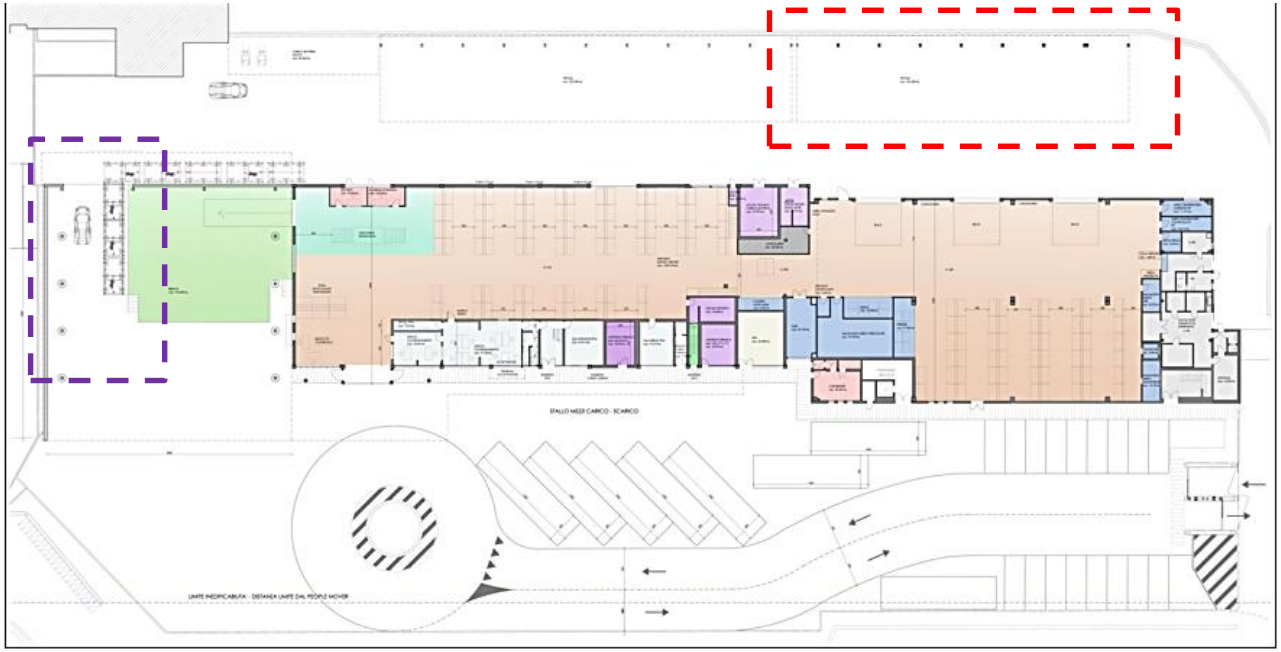
SHORT TIME: the new terminal cargo layout

- ✓ AN UNIQUE GATE FOR IMPORT AND EXPORT GOODS
- ✓ A NEW STORAGE AREA IN AIRSIDE
- ✓ STORAGE AREA MAXIMIZATION
- ✓ SECONDARY FUNCTIONS AT THE SECOND FLOOR

STORAGE AREA:
FROM 460 sqm
TO 1550 sqm

4 years

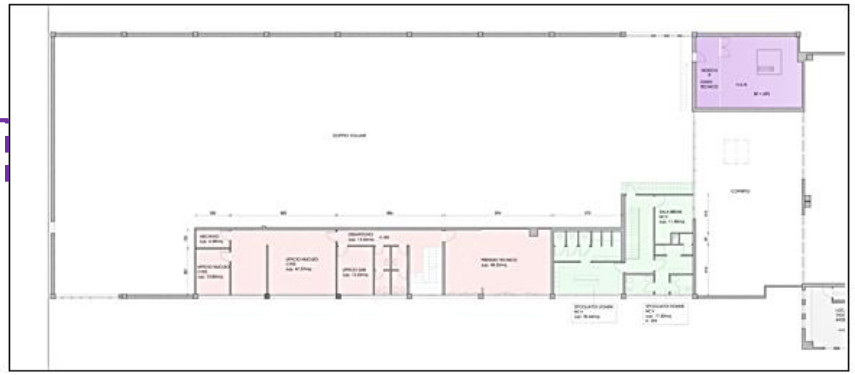
ESTIMATED END: 02/2023



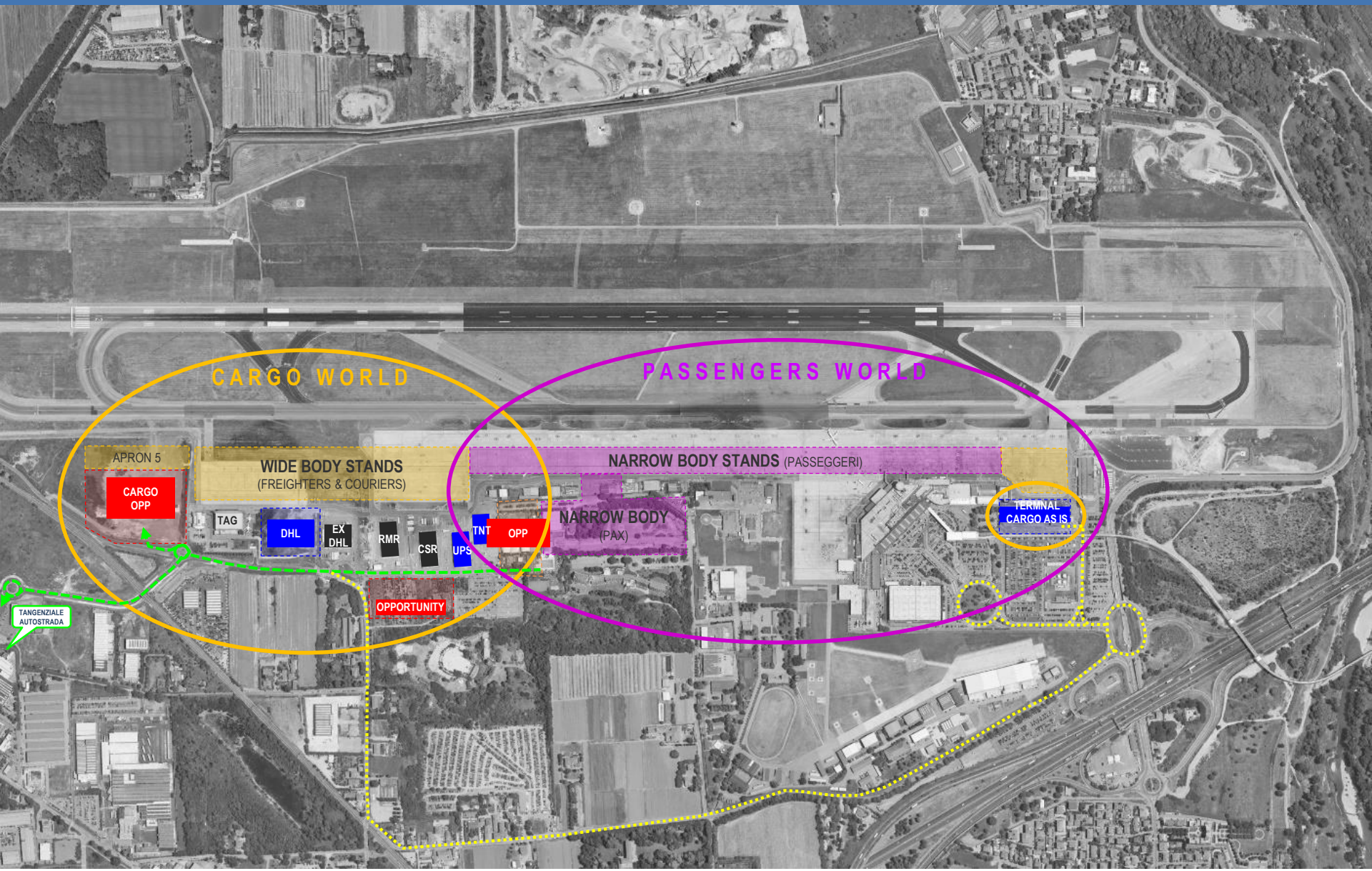
PRIORITIES

1. AN UNIQUE CUSTOMS WHAREEHOUSE
2. A NEW STORAGE AREA IN AIRSIDE

1. END: 12/2022
2. END: 09/2021



CARGO MEDIUM TERM OPPORTUNITIES



LEGENDA: STAND CARGO | STAND PASSENGERS | CARGO AS IS | CARGO OPPORTUNITY | OTHERS | ACTUALCARGO VIABILITY | FUTURE CARGO VIABILITY

THANKS FOR YOUR ATTENTION

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