

MRO

Europe prepares for a comeback

LRU Management

Shifting demands
for a changing market

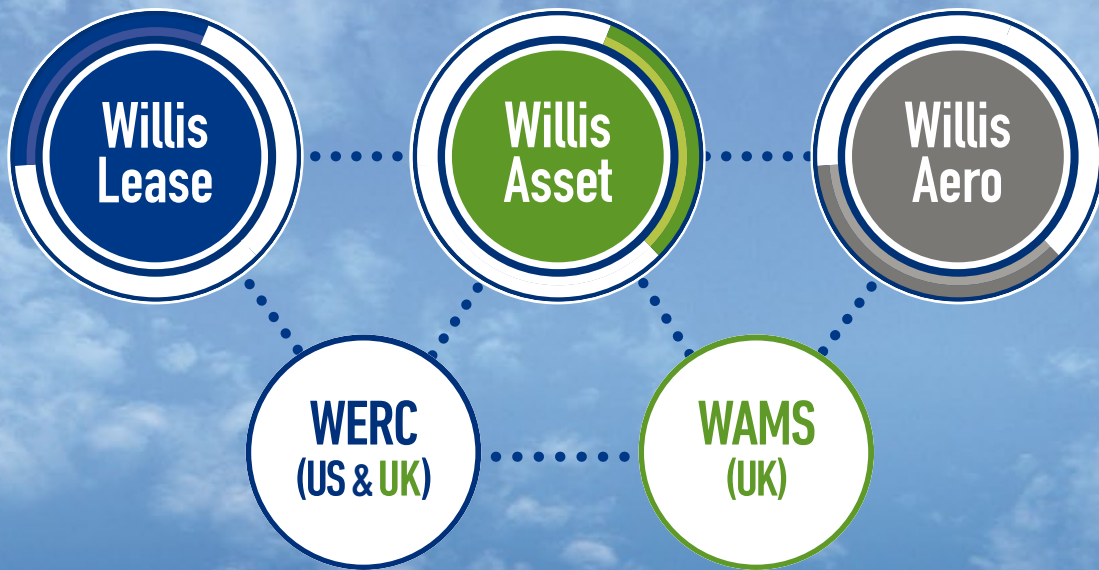
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Transatlantic travel begins to open, thankfully.

Delta is bringing back several European routes.

Photo: Delta

It's encouraging to see various routes between Europe and the U.S opening for those travelling for non-essential reasons, including leisure and business travellers. This is obviously some good news for the wider aviation services community.

In May, the European Commission proposed to allow entry to the EU for non-essential reasons not only for all persons coming from countries with a good epidemiological situation but also all people who have received the last recommended dose of an EU-authorized vaccine.

The Netherlands, Germany and Portugal have largely reopened to U.S. travellers and Italy has eliminated Covid-tested travel protocol which means fully vaccinated travellers can enter without significant additional requirements.

Delta has been at the forefront of reinstating its services across the pond bringing back operations to several points on its European network including Lisbon from JFK and boosting services to its hub in Amsterdam from across the U.S. Delta will also continue operating nonstop daily service between Atlanta and Frankfurt.

United Airlines also applauded Spain following its decision to reopen travel to vaccinated visitors from the beginning of June and this has reflected in the carrier's summer schedule which includes expanded services into Frankfurt, Munich and Brussels that provide broad connectivity throughout the region. The U.S. carrier says it will also be adding new routes to Dubrovnik, Croatia, Reykjavik, and Athens.

In the UK, the aviation community including the British Airline Pilots Association (BALPA) has been urging the British government to urgently introduce a robust, science-based approach to opening-up safe travel. The UK aviation industry has been the hardest hit in Europe by restrictions on international travel.

Keith Mwanalushi

Editor



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AJW Group signs power-by-the-hour contract with TUS Airways



TUS Airways Fokker 100 aircraft

Photo: AirTeamImages

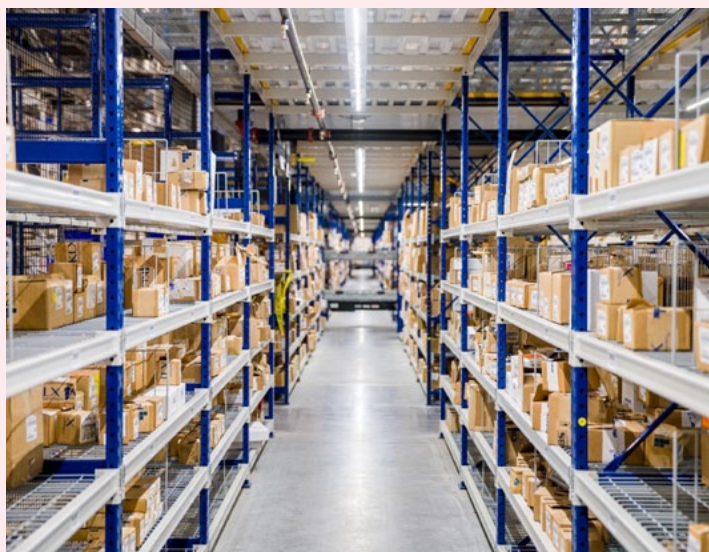
AJW Group has secured a new power-by-the-hour (PBH) support contract with Cypriot carrier TUS Airways. AJW ensured a flexible service launch for the A320 operator, initially with pool access, increasing to the full PBH service contract once operations stabilize beyond the pandemic. TUS Airways began commercial operations in 2016 with a fleet of Saab and Fokker aircraft, operating out of Larnaca International Airport in Cyprus, offering both charter and scheduled services. The multi-year PBH contract recognizes AJW's global reputation in the marketplace and the agility with which it comprehensively supports start-up airlines with complete supply chain solutions.

Next Level Aviation to support Pratt & Whitney CSA through consignment of used serviceable engine accessories

Pratt & Whitney CSA, the serviceable materials business unit of Pratt & Whitney, and Next Level Aviation, a leader in the global distribution of used serviceable materials (USM), have signed an agreement regarding the sale of USM for aircraft engines. This contract furthers Pratt & Whitney's commitment to providing its customers with cost-effective products at world-class lead times. It also further enhances Next Level Aviation's position as a leading global supplier of USM primarily supporting Boeing and Airbus aircraft platforms and associated jet engines. This agreement between Pratt & Whitney CSA and Next Level Aviation pairs the resources and technical expertise of Pratt & Whitney CSA with the sales, marketing and delivery expertise of Next Level Aviation. This powerful combination provides Next Level Aviation's global customer base of airlines, leasing companies and maintenance, repair, and overhaul (MRO) shops with significant value and cost savings.

Turkish Technic expands inventory with Boeing parts agreement

Boeing and Turkish Technic have renewed a tailored parts package agreement, extending the maintenance, repair, and overhaul (MRO) provider's current contract by three years. The contract will enable Turkish Technic to reinforce its efficiency, reliability, and access to a global network of parts and component services. Through this agreement, Turkish Technic will continue to streamline maintenance operations with price and availability benefits from the renewal agreement. This tailored parts package three-year renewal expands the companies' previous agreement with 9,000-part numbers. The parts include a range of Boeing and supplier parts sourced through both Boeing and partner entities. Turkish Technic is a leading aviation services provider, with comprehensive maintenance, repair, overhaul, modification, and reconfiguration services performed by a highly qualified workforce from around the world. Turkish Technic supports aircraft operators and owners globally with encompassing component pooling, design, certification, and production services.



Boeing Distribution Services warehouse in Miami, FL

Photo: Boeing

Fly Leasing shareholders approve acquisition by Carlyle Aviation

Fly Leasing Limited (FLY) has received shareholder approval to be acquired by an affiliate of Carlyle Aviation Partners (Carlyle Aviation), the commercial aviation investment and servicing arm within Carlyle's US\$59 billion global credit platform. Approximately 99.9% of the votes cast at the special general meeting of FLY's shareholders voted in favor of the transaction. Closing of the transaction remains subject to the satisfaction or waiver of customary closing conditions, including receipt of regulatory approvals. The transaction is expected to close prior to the end of July 2021. Upon closing, FLY shareholders will receive US\$17.05 per share in cash for each FLY share that they own. Following the closing of the transaction, FLY shares will no longer be listed on the New York Stock Exchange and the company will become part of Carlyle Aviation.

GA Telesis and Aero Staking sign distribution agreement

GA Telesis (GAT) has announced an agreement with Aero Staking, to become a global distributor of its extensive product line of aircraft tooling, bearings, and bearing testing equipment. This partnership represents GA Telesis' Tarmac Solutions commitment to supporting airlines and MROs in reducing their overall maintenance costs while finding those solutions all in one location. To date, the Tarmac Solutions division of the Flight Solutions Group (FSG) has expanded its portfolio of aftermarket supplier partnerships, providing greater overall tool and GSE options for its customers globally. "Aero Staking brings a unique product line to the industry, and we are delighted to partner with them as an exclusive distributor to support airlines and MROs with these critical tools," said Jason Reed, President of GA Telesis' Flight Solutions Group.

CSAT expands base maintenance certification for customers operating Airbus A320neo-family aircraft

Czech Airlines Technics (CSAT) has started to provide base maintenance to airlines and leasing companies operating Airbus A320neo-family aircraft. The first two overhauls were successfully completed by the base maintenance division at Václav Havel Airport Prague in recent weeks. The Swedish airline Novair became the first customer of CSAT within the segment. CSAT received its new authorization from the Civil Aviation Authority of the Czech Republic. In the first quarter of this year, the company also introduced Boeing 737 MAX aircraft base maintenance services. On the basis of a new signed agreement, maintenance of two Airbus A32neo aircraft, SE-RKA and SE-RKB registration, was performed for the Swedish carrier Novair. The aircraft returned to operation after the prescribed work was performed to continue to be flown under the "Apollo" brand.



Airbus A321neo aircraft

Photo: CSAT

Liebherr to supply cockpit static inverter for Airbus A320 and A330 families

Liebherr-Aerospace has been selected by Airbus to supply the cockpit static inverter for the Airbus A320 and A330 families. It is the first contract for the company in the segment of aircraft systems ATA Chapter 24 – Electrical Systems – and opens the door for Liebherr to deploy its know-how and latest stand-alone power electronics technologies in this high-potential business sector. Liebherr-Aerospace's cockpit static inverter will replace the current version. It offers a more reliable, lightweight, fully digital solution, and is based on wide band-gap technology together with enhanced connection functions. Two Liebherr companies have developed the cockpit static inverter: Liebherr-Elektronik GmbH and Liebherr-Aerospace Toulouse SAS, the former based in Lindau (Germany) which is Liebherr's center of excellence for electronics and a major player in its field, and which is also responsible for all activities regarding the hardware, including production, while the latter is Liebherr's center of excellence for air management systems in Toulouse (France), providing the inverter's software. Both companies have vast experience in power electronics and joined forces to offer Airbus the latest technology.

AJW Group and Arena Investors launch US\$100 million Dublin-based aviation asset JV

AJW Group (AJW) and Arena Investors, LP (Arena) have announced their joint venture which will focus on the selective acquisition of commercial aircraft, engines, and components. The JV will take advantage of AJW's global network and operational expertise, along with Arena's comprehensive experience in investments related to the aviation industry. The joint venture will be based in Dublin, Ireland, where AJW and Arena will jointly acquire a targeted portfolio of aircraft and engines to be managed and monetized through AJW's global network. The joint venture is to be funded with committed capital of up to US\$100 million. AJW has roughly 90 years of experience and is a world-leading independent specialist in the supply, lease, and repair of aircraft components and a supply chain solution provider to over 1,000 airlines. The joint venture will feed engines and components into AJW's global inventory utilising the extensive repair capabilities of AJW Technique, the Group's state-of-the-art, industry-leading maintenance hub based in Montreal. Vivek Nayar, Arena Investors, comments: "We are thrilled to be forming a partnership with AJW, one of the most storied and reputable firms in the aviation services industry, with its wide geographical reach and customer base. AJW's experience, combined with Arena's flexible capital solutions, are especially relevant at a time when there are great liquidity needs in the industry. We look forward to helping to solve those needs."

HAECO extends long-standing agreement with China Airlines

HAECO ITM, a member of the HAECO Group, has extended its long-standing agreement with China Airlines (CAL) to provide inventory technical management support to the airline's expanding Boeing 777 fleet. The new agreement will run until 2029 and includes the addition of six Boeing 777F aircraft, while the first two aircraft were delivered in December 2020 and all aircraft will be entering into service by 2023. The contract extension covers component MRO, repair management, component pooling, component engineering, consumable, and expendable parts support services, AOG support as well as onsite consignment stock in Taipei to all 16 of CAL's Boeing 777 passenger and freighter fleet.

Avianor and LATAM Cargo team-up for cargo modifications on three Boeing 767s

Montreal Mirabel International Airport-based Avianor, and LATAM Cargo, based in Santiago, Chile, have completed and certified temporary cargo modifications on three Boeing 767 aircraft. Avianor, an affiliate company of DRAKKAR Aerospace & Ground Transportation, was previously contracted through a mutual collaborator to perform cabin reconfiguration work on LATAM's 767 and 777 aircraft. Avianor's experience and familiarity of these aircraft, along with its turnkey temporary cargo conversation solution, encouraged LATAM Cargo to contact Avianor to repurpose the cabin interiors of its 767 aircraft. In May, LATAM Cargo announced that up to ten 767 will be permanently converted to cargo in the coming years. The implementation of Avianor's temporary cargo modification was a quick and efficient solution while they await its conversions. This trusted business relationship combined progressive thinking, agility, and expertise to propose an innovative response to keep LATAM's 767 aircraft flying and support the demand to transport valuable perishable supplies. Avianor's temporary cargo modification solution has supported airlines around the world, by allowing them to adapt their offering to the needs of the economy, support the influx of e-commerce demands and maximize the use of aircrafts during the pandemic. LATAM will operate these aircrafts with Avianor's Transport Canada Civil Aviation (TCCA) Supplemental Type Certificate (STC) while it gets validated by the Federal Aviation Administration (FAA). Aircraft were modified at the beginning of 2021 at LATAM's Santiago facilities. Avianor provided the materials and work instructions which were then completed with an official virtual walk through to confirm STC compliance.



LATAM Cargo

Photo: AirTeamImages

JORAMCO and VD Gulf (UAE) sign framework agreement for cooperation

JORAMCO and VD Gulf (UAE) have signed a framework agreement on MRO cooperation. Under the agreement, both independent MROs aim to expand their existing capabilities, capacity and optimize their synergies for a one-stop-shop upscaled customer experience, in addition to encouraging and promoting sustainable development for both organizations. Jeff Wilkinson, JORAMCO CEO commented, "We are excited to work hand in hand with VD Gulf to extend our support and commitment to our valued customers across the globe. This successful collaboration shows that Joramco and VD Gulf are both trusted MRO companies and will form the future of the MRO industry in the region to adapt to customers' needs". Mikhail Khoroshaev, Executive President VDT & Accountable Manager VD Gulf said, "As we enter a new era following



JORAMCO, VD Gulf MoU signing
Photo: JORAMCO

the COVID-19 pandemic, it is prudent that MROs across the globe endeavor to work jointly as witnessed in other industries. With their complimentary resources, such cooperation will open new frontiers globally for the two

MROs." The agreement was signed by Wilkinson and Khoroshaev during the MRO Middle East 2021, the Gulf region's leading annual conference and exhibition for commercial aviation maintenance.

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 A photograph of a male technician wearing a black AerFin beanie, safety glasses, and blue gloves, working on a large aircraft engine. The technician is looking up at the engine with a focused expression. The background is a blurred industrial setting.

Shining a Lite on new engine solutions

AerFin is looking at three initial engines for MRO Lite.
Photo: AerFin

AerFin recently launched a new suite of engine maintenance solutions aimed at cost reduction and flexibility in work scope. **Keith Mwanalushi** sat with senior management to get more insight into the new MRO Lite services.

Fresh off the heels of gaining approved repair stations accreditation by the Federal Aviation Administration (FAR 145) at its facility in Caerphilly, Wales, AerFin has launched its engine MRO Lite Service.

Launching the new product offering in May, the aviation MRO and aftermarket specialists, who specialise in providing efficient and sustainable solutions, said this new service offers a range of in-house and off-wing engine maintenance solutions, including quick-turn services, hospital shop repairs and engine transitions across CF34-8, CFM56-5 and 7 and RB211-524 engine platforms.

"The more we talked to customers the more we recognised there was demand for a bespoke or flexible offering that is much more about cost avoidance versus an engine overhaul slot and

the expense that goes with it," James Bennett, Commercial Director at AerFin tells *AviTrader MRO*. Bennett explains that having airlines, MROs and lessors as the key customer segmentation, and especially with the effects of Covid, all the indications pointed to a requirement to look at minimising cost reduction, maximising asset value wherever they could and extending fleet life and age where possible, all tailored neatly to what AerFin is looking to offer with MRO Lite.

"As we come out of this pandemic, there is going to be another surge in MRO capacity as a consequence of deferred maintenance, and as we head towards 2023 [and a gradual return to 2019 activity levels], I sense we are going to find that the big MROs will not have the slots available to accommodate this type of work scope. They will be looking

for the \$4-5million engine overhauls for obvious reasons. And yet you have a situation where the airlines are looking to reduce cost, and the MROs are looking to potentially, where they can, offload more minor work scope activity," Bennett states.

Certainly, in the current environment, airlines and aircraft operators will likely turn to engine hospital visits rather than full engine inductions but MRO Lite was not a direct response to the challenges caused by the pandemic but was in development well before the onset of Covid. "These questions were already being asked of us pre-pandemic, that is the key to this, Bennett stresses. "What has happened is, the demand for it has now accelerated."

Director of Operations, Simon Bayliss, comments that the scope of work will

include both scheduled and unscheduled engine services. "A lot of this was based on some of our own engines as well. Pre-pandemic, we had a sizeable lease portfolio and we see MRO Lite as being a good enabler for both reducing our own cost base and controlling the time in which we do them."

Bennett adds: "Prior to the pandemic you had this bottleneck at the MROs that you don't have now but once we get into 2022 -23 and you are approaching 2019 levels that type of flexible minimal work scope approach is not what the major MROs are going to want for obvious reasons."

The AerFin MRO facility, which recently achieved FAR 145 accreditation is complete with OEM engine line tooling, a 10-tonne gantry overhead crane and has the capacity to store up-to 55 fan engines – "We have invested in our infrastructure and our tooling and put our staff through all the regulatory training to bring them up to the correct standard," comments Bayliss in response to the investment put into the new suite of services.

Looking at the three initial engine choices for MRO Lite, Bennett reckons the residual values for those engines are positive. He gives the CF34-8 as an example which sees 75% of the operator base on the E-170s in the North America market – "that domestic market is strong and those are efficient aircraft targeted at the 75-passenger segment which has seen good uplift even through the whole pandemic."

With the CFM56-5B and 7Bs Bennett points out that currently, some 50% of those engines are yet to have their first shop visit and the maintenance plans for those engines still look strong. "We have been careful to focus on narrowbody and regional jets. - with their strong maintenance forecast and predictable engine activity, at least as predictable as we can be right now. When we talk to our origination team any firming up of pricing that they are seeing, has been in the engine market on those platforms. Such investment gives us renewed confidence in customer demand moving forward."



Simon Bayliss, Director of Operations, AerFin

Another interesting engine choice is the RB211-524 clearly aimed at the Boeing 747-400 freighter market. Since the peak of the Covid crisis in May last year, some 200 aircraft of various types have joined the global freighter fleet according to aviation advisory firm, IBA. Boeing forecasts 1,500 freighter conversions will be needed over the next 20 years to meet growing demand.

"Looking at the performance of those cargo operators over the pandemic they have all been posting stellar profits during the period, there doesn't look like there'll be a let up in that cargo demand, especially in the short term and then you've got the P2F conversions which is also expected to increase significantly, all of which points to confidence in not just the 524 platform but also the CFM56-7B."

Bennett continues saying the suite of product lines that MRO Lite has started with will not necessarily be the only ones, but the three initial engine types are more likely to get off to a flying start.

“As we come out of this pandemic, there is going to be another surge in MRO capacity as a consequence of deferred maintenance.”

James Bennett, Commercial Director at AerFin



James Bennett, Commercial Director, AerFin

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L3Harris and Intersky signing at MRO Americas.
Photos: L3Harris

Recently, L3Harris announced two new distributor partnerships as part of a new aftermarket offering. **AviTrader MRO** caught up with Adrian Paull, VP Customer Excellence, Commercial Aerospace Solutions to learn more.

Back in April during the MRO Americas event in Dallas, Texas, technology company L3Harris announced two new distributor partnerships with OEMservices and Intersky. The service aims to add value to L3Harris' product development offering, capitalising on the shift of airlines' fleet of management strategies due to Covid.

OEMServices will maintain strategic inventory, provide critical logistics services and act as the first point of contact for around the clock support. With corporate headquarters in France, OEMServices has more than 100 strategic global service centres that provide localised on-demand inventory, repair management solutions, engineering services and AOG logistics support.

When looking at AOG support services during the pandemic and what efficiencies can be derived with the partnership, Adrian Paull says, initially, the demand shock caused by Covid-19 brought them closer to customers. "Many customers have significantly reduced their inventory holdings and are discovering enhanced cost efficiencies through more comprehensive support agreements with suppliers. To align with these changes, we are currently expanding our global footprint and creating regional support options for our customers so they can quickly access our service and support."

Paull reminds that the unprecedented pressure brought upon the industry by the pandemic has caused all parties to re-examine their core objectives and partner to achieve these in the most efficient manner. "As a result, through our relationship with OEMServices, we will have more product distributed and held globally, positioned to respond to our customers' urgent needs."

InterSky will maintain strategic inventory for TCAS, transponders, SATCOM, cockpit voice and flight data recorders, ground support equipment, standbys and associated components supporting these products. InterSky will list all the L3Harris products online for easier customer access and ordering.

L3Harris are seeing that there are more demands in retrofit-ready products which align with current regional mandates and technology evolution. Paull says being able to partner with regionalised logistics and supplier firms enable operators to meet these new mandated requirements quickly and more cost efficiently. "InterSky's well-known reputation as a third-party aftermarket provider and clear focus on positive customer relations brings value and reduces time and costs for our customer service centres."

InterSky is in Memphis, Tennessee and provides products,

component repair, engineering services and maintenance, repair and overhaul services.

Looking ahead, the industry will keep an eye on any significant changes to the aviation aftermarket sector post Covid in order to implement change strategies where and when necessary. Clearly airlines are seeking more strategic partners for aircraft maintenance and operational efficiency by leveraging localised partners' strengths.

"Outsourcing premium services can provide enhanced expertise and global knowledge while lowering total lifetime costs for key products and operations," highlights Paull. However, he says data availability and analysis will continue to help change the aftermarket services.

For many airlines, he says their travel destinations are constantly being refined considering shifting demand. One tool that assists with the management of this is the L3Harris flight data services for FDM/FOQA reporting. This web-based tool enables immediate review for each flight by the airline for quick implementation of safety, maintenance, and training changes to augment best-practices and efficiency.

Paull explains that this programme ties into the Flight Data eXchange programme which is a collaborative aerospace data sharing programme between IATA and airlines which allows GADM participants to analyse and identify safety risks by comparing their own flight data against the aggregated de-identified global FDX database. "This airline specific and global flight database access enables airlines to review new and existing routes using real de-identified global flight data. This analysis enables flight operations to enhance their training programming for the pilots embarking on new routes, as well as identify repetitive safety alerts," states Paull.

Adrian Paull,
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LRU fuel pump inspection.
Photo: AFI KLM E&M

LRUs: shifting demands and shifting solutions

The need for LRU services decreased dramatically over the past year as airlines operated reduced flying schedules. **Keith Mwanalushi** speaks to industry experts to see how the pandemic affected the management of these components.

The MRO industry has seen some significant changes with the management of Line Replaceable Units (LRUs) during the pandemic. From an aftermarket perspective several different scenarios are playing out. On the airframe LRU side of the industry, Jason Reed, President, Flight Solutions Group (a division of GA Telesis) says there was a dramatic drop in purchasing from the airlines and a shift towards "AOG only" purchasing or a "repair only" mentality. "Some airlines informed us that their purchasing dropped 80% on those LRU types. For engine LRUs, those items still had a lesser but continuous flow since maintenance shops continued running at about 50% of routine restorations."

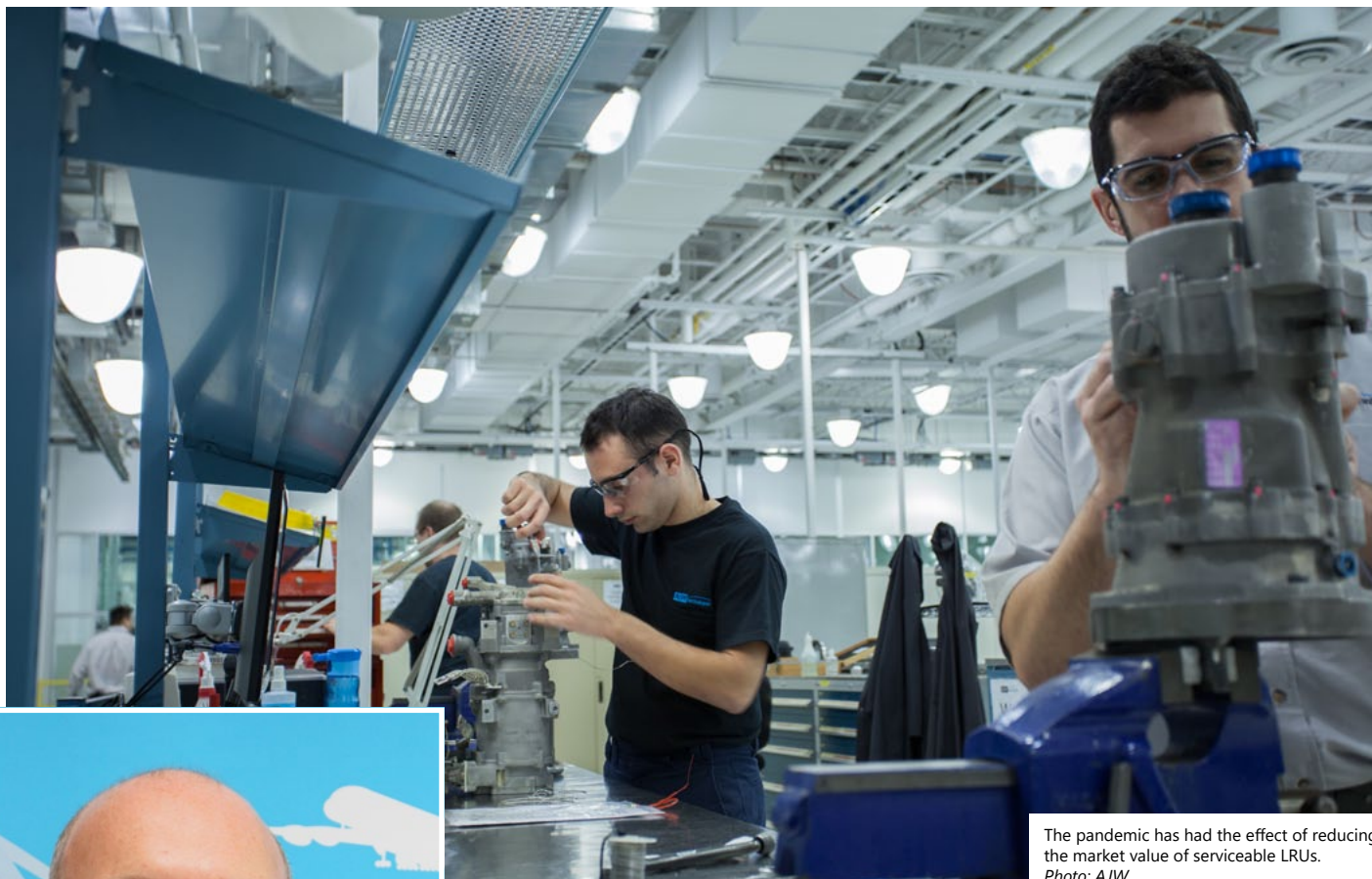
In a different light, many Power-by-Hour (PBH) providers had to manage

their pools in a vastly different manner knowing that airlines wanted rate reductions due to the lack of flying hours, Reed states. "In that light, many providers put a full stop to all LRUs going out for repair to avoid costs and maximise the profitability of their programmes."

Many operators, service providers, MROs and stockists have been seeking to reduce their costs to the absolute minimum. The conditions facing airlines created the need for flexibility and pragmatism in an aftermarket that was suddenly heavily disrupted. Chas Richardson, Commercial Manager, AJW Group explains that with many operators seeking suspensions, amendments and even terminations of their aftermarket support contracts, AJW has seized the opportunity to offer solutions that are



Chas Richardson, Commercial Manager at AJW Group



The pandemic has had the effect of reducing the market value of serviceable LRUs.
Photo: AJW



Allan Pennycuik, VP Operations at AJW Technique

flexible and fair. "Offering short-term contract suspensions, 'pay-as-you-go' stop-gap solutions and the opportunity to evolve the commercial framework of the service provision as flying resumes has been particularly successful for AJW."

In the component MRO world, Allan Pennycuik, VP Operations at AJW Technique saw that the immediate change was to put a hold on component

maintenance, and only send LRUs for repair in line with operational requirements. "Many airlines, with a proportion of their fleet parked, elect to take LRUs from non-flying aircraft, in effect delaying the maintenance on unserviceable components," he adds.

As airlines then restart flying and ramp up their flying schedules, AJW Technique have seen a significant increase in volumes from certain customers, in support of aircraft resuming more regular operations. "We have been able to adjust skills and capacity in response to these changing requirements, ensuring we are able to support our customers with optimal turnaround times in active cells," says Pennycuik.

The pandemic has had the effect of reducing the market value of serviceable LRUs, so again AJW have seen an increase in the number of LRUs declared BER (Beyond Economical Repair). Pennycuik expects values to

bounce back at some point, but in the meantime, AJW is being flexible and support operators with exchange units at attractive prices.

At Spairliners, they are currently seeing a counterbalance between moderate restart of airline activity and therefore still reduced demand for components, as well as the challenges of returning to a smooth and efficient supply chain, mainly due to the reduced transportation opportunities.

"The intra-Europe travel is currently at a plateau, which allows for some additional time for the supply chain to get back on track, in-line with the slowly recovering demand for components," observes Benoît Rollier, Managing Director and CFO at Spairliners.

Rollier anticipates a higher availability on the Used Serviceable Material (USM) market with surplus coming from activities such as teardowns from retired aircraft which is lowering the prices for such components globally. "For us as a

component support provider, we find increasing attractiveness in replacing unserviceable parts instead of repairing them. Hence, we can now leverage a range of options, such as repair or parking the unserviceable unit for the time being. Also, scrap and replace for each LRU on a case-by-case basis in order to optimise costs. This makes the management of LRUs globally an exciting and innovative business."

Clearly, airlines and MROs are still focused on liquidity preservation and reduction of working capital requirements, such that they are holding far less inventory than prior to the Covid-19 pandemic. "This is especially true with high value LRU components," mentions Daniel Moreno, Senior Airframe Manager at Kellstrom Aerospace. For distributors of factory new condition LRUs, Moreno reckons it is more important than ever to have material available from stock because the quantity of AOG and critical requirements is greater than ever, and customers simply cannot wait for factory lead times. "With respect to USM component leasing, this has increased in popularity; although leasing is typically synonymous with whole aircraft, engines, and landing gears. Component leasing allows for more liquidity for an airline operation whilst having access to a larger pool of options to cover both planned and unplanned line maintenance," says Moreno.

Exchange activity is on the increase versus outright purchase as operators are forced to continually reduce inventory holding, notes Mark Shimizu, Head of Inventory and Sales at AerFin. "LRU exchanges provide the operators



Benoît Rollier, Managing Director and CFO, Spairliners

with immediate access to low-cost inventory available off the shelf and defer the repair cost until the core unit is returned to the vendor and processed through the MRO workshop."

Shimizu adds that whilst there is a high volume of serviceable components currently held by numerous parts suppliers, the reduction in component demand has put a pause on many suppliers speculatively launching unserviceable components for recertification. AerFin are continually investing in additional components to be launched for repair and overhaul from high-quality reputable repair vendors



“Component leasing allows for more liquidity for an airline operation whilst having access to a larger pool of options.”

Daniel Moreno,
Kellstrom
Aerospace

to ensure there is maximum coverage to operators of their core platforms.

Optimise LRU maintenance to minimise spares inventory

AFI KLM E&M say in order to reduce the stock of spare parts and LRUs, it is important to share this stock as much as possible with all the customers for whom they provide LRU maintenance. "From a technical point of view, it is also important to have a common maintenance policy for all the LRUs we manage," comments Mario Fernandes Abade, AFI KLM E&M Engine Accessories Unit Manager. He says it is necessary to minimise the return time of unusable LRUs back to the repair shop.

An obvious solution is to pool stocks with other operators through a pool service such as the one AFI KLM E&M offers its customer. "In addition to the proximity to the operator and therefore the speed with which we can respond to a request, this solution not only reduces inventory costs but also allows our

customers to benefit from our expertise as an airline-MRO in areas such as pool sizing, optimisation of technical standards, repair management and sourcing," Fernandes Abade continues.



Mike Cazaz, CEO at Werner Aero Services

Mike Cazaz, CEO at Werner Aero Services agrees that the best solution for an operator is to sign up with a pooling provider to access its pool. "With a pool option the need to hold inventory on hand is minimal and hence the upfront capital expense is limited. A pooling option provides the operator the ability to better predict operating costs, reduced overhead expense, management of the risk of the supply chain vulnerability and improved cash flow."

At the Flight Solutions Group they see the European market as the region that tends to maximise cost management of LRUs as a whole. Reed says that market is exchange driven with minor costs on exchange fees plus repair costs as a way forward to optimisation. "Many other regions continue purchasing high dollar LRUs, ending up with higher stock values. Having those higher stock values is a significant risk due to asset values and associated part values dropping dramatically over the last 18 months. We saw some LRUs which were previously

near \$400K in value daily now only selling for under \$200K at best. With heavy teardowns scheduled over the next three years, those inventory values will not come back anytime soon; thus, exchanges are the way to go."

Not only that, but Reed also continues saying for those that wish to maximise their cash flows, having pre-arranged agreements in the aftermarket is a better way to carry those parts. "If an airline typically predicts usage of 10 specific LRUs a year, they could rely on aftermarket providers to bulk purchase all 10 of those units in advance, and at a discount, in exchange for a guaranteed yearly buy commitment. This maximises cash flows for the airline yet satisfies their guaranteed demand at the same time."

AJW offer several supply chain support solutions to customers to facilitate optimal inventory management based on fleet and size of operation. For example, exchange solutions for smaller fleets where volumes do not justify extensive inventory ownership. "We also offer shared strategic customer pools, with multiple user access to a defined stock holding in a region or geographic zone. This allows a service-level guarantee of LRU availability, with the stock holding cost spread across several customers to achieve economies of scale," states Richardson.

Additionally, Pennycuik adds that AJW Technique offer specific programmes for time-controlled units, escape slides being a prime example. "Slides are time controlled on a calendar basis, so overhauling them before they are required for installation results in the burning of on-wing or green time. With several customers, we have established direct links with their planning teams and are able to provide overhauled slides 10 to 14 days ahead of the required aircraft installation date via a joint-forecast and fulfilment model. This enables our customers to maximise on-wing time and optimise inventory," he says.

Aircraft do not fare well while they are inactive, requiring daily, weekly, and monthly checks to keep them in airworthy condition. These checks can sometimes

lead to unscheduled replacement of LRUs and components while they are grounded prompting the operator to either replace company owned stock or rely on readily available components in the market. Kellstrom Aerospace indicated that they offer clients a variety of cost-saving options to optimise inventory including rotatable exchange pools and onsite consignment inventories.

Operators have further options to optimise maintenance of LRUs in order to minimise spare parts inventory, such as negotiating with various component workshops to repair and hold units sent to shop. "These LRU's can be called off as and when required, further improving cashflow by being invoiced only when the component is required," says Shimizu at AerFin.

There is also a growing demand for leasing of LRU's versus owning or further investing in own assets. Shimizu says AerFin offer cost effective leasing of fast turning inventory at multiple onsite locations worldwide to keep up front investment at a minimum for operators.



Jason Reed, President, Flight Solutions Group

He adds: "As operators are now experiencing such uncertainty in forecasting future flight hours, they have been seeking alternative solutions



“LRU exchanges provide the operators with immediate access to low-cost inventory.”

Mark Shimizu, AerFin

Mark Shimizu, Head of Inventory and Sales, AerFin

moving away from the more traditional Power by the Hour solution looking for more flexible programmes which accommodates unforeseen fluctuations in flight hours whilst protecting maximum coverage.”

OEM relationships

Airlines often face challenges where some LRUs are only available from OEMs, for instance some engine components. Operators will likely look for solutions to navigate around such complexities. The increased availability on the USM market creates a significant leverage for operators and third-party component suppliers, especially in times of lower demand and for mature aircraft types, suggests Rollier from Spairliners – “In addition to that, suppliers can apply innovative solutions to retrieve spare parts from scrapped units in order to repair others, thus again staying independent of the OEM and minimising costs.

“We are clearly in a virtuous cycle that fosters recycling concepts rather than

injecting new components into the loop during times of low activity. And even when activity picks up and returns to the high levels of the past, we are convinced that such good practices will survive, for better leverage on costs as well as improved sustainability.”

In order to maintain a certain dependence on these critical LRUs and to obtain the best price conditions for spare parts and repair of sub-assemblies, AFI KLM E&M works closely with OEMs to provide the best added value to its customers. Karim Daoud-Almadawar, Head of Costing and Pricing Components explains that this cooperation can take various shapes or forms, such as licence agreements, in-house repair developments and strategic partnerships. “One of the main advantages we offer is our capacity to integrate the full scope of the aircraft in order to streamline the component support. And finally, it is necessary to keep the momentum of developing DER repairs on major parts. This allows us to improve the renewal

rate and reduce the share of purchasing new parts.”

Cazaz at Werner Aero Services is of the view that airlines must get together and protest the monopoly and unfair trade that some OEMs have created, he says that is of course the long-term solution but in the short term the solution is to sign up to pool access with a pool provider who can guarantee TAT of LRUs.

At AJW they continue to work very closely with all the key OEMs to ensure they can support their products via licensing agreements, without compromising the OEM strategy. “This enables us to find win-win solutions to establish relevant capabilities in partnership with the OEMs, ensuring essential support on piece parts and technical data for AJW Technique. Furthermore, as a group, AJW have put significant focus on consolidating core spend into clear and sustainable OEM-centric contracts,” concludes Pennycuik.



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Europe: Picking up the pieces

Several carriers shut down during the pandemic.
Photos: Laudamotion

European MROs and aftermarket specialists have continuously adapted their business models in response to the severe challenges caused by the coronavirus. **Keith Mwanalushi** examines the outlook for the region as airlines rebuild their networks.

Unlike the United States, Europe was affected massively by the pandemic due to the absence of big domestic markets and the different travel restrictions between the different countries. The region suffered from several airline bankruptcies or with some carriers stopping flying entirely.

At Lufthansa Technik, they are currently seeing a slow ramp up in airline traffic with some confidence in the market for airline traffic to increase over the next months as the vaccination programmes gains pace. "The majority of airlines used the crisis for restructuring with a clear aim to bring the cost down and increase operational and financial flexibility," notes Georgios Ouzounidis, Senior Director Corporate Sales Europe at Lufthansa Technik. For the MRO market, he sees significant opportunities for the suppliers that can offer short term flexible solutions in accordance with the customer needs.

"However, in the mid to long term we see significant opportunities in the area of digitisation and automation as the major driver to reduce cost and increase efficiency substantially."



Adil Slimani, Head of Aftermarket Advisory at IBA Group

As the aviation sector looks to recover, aviation analysts at IBA have observed heavy maintenance costs for aircraft and engines being deferred, in line with many other cost and efficiency savings. "Entities that are able to support these strategies have the greatest potential for recovery," says Adil Slimani, Head of Aftermarket Advisory at the IBA Group. He adds that stockists have already begun making enquiries for airlines' surplus inventories.

Slimani foretells the backlog of engines and the expected increase in shop visit lead times from 45 to 120 days is expected to fuel the green time engine lease market. Similarly, the use of new technology to streamline supply chains will gain increased momentum. "The MRO sector has a long history of collaborative and competitive services with OEMs, which we predict will become more collaborative as operators seek to reduce unscheduled maintenance risk by taking up greater OEM aftermarket support."

At AFI KLM E&M, they foresee is a quick recovery, specifically for medium-haul (narrowbody) fleets. This, together with the re-entry into service of the Boeing 737MAX will probably lead to pressure on the MRO for these aircraft and engines, believes Olaf Hoftijzer, VP AFI KLM E&M Sales Europe and Key Accounts. "Several of our customers already indicated that they want to have full capacity available when the market demands this, and therefore asked to do engine overhaul earlier than in their current planning. At the same time, we do see a tendency for using green time engines, although there is some reluctance at operators for this, since they are not sure about the technical status of these engines and therefore prefer full shop visits. Recovery of the long-haul widebody fleet is dependent on the global vaccination programmes so varies based on the destinations that are served by customers."

Speaking from Alton Aviation Consultancy in New York, Managing Director Jonathan Berger feels as the industry recovery begins, specific opportunities in the European MRO market include continued focus on supporting the growth of air cargo operators which has accelerated as a result of e-commerce and customer demand for express freight delivery. "Look for companies like Amazon to seek



Jonathan Berger MD Alton Aviation Consultancy



“The majority of airlines used the crisis for restructuring with a clear aim to bring the cost down and increase operational and financial flexibility.”

**Georgios Ouzounidis,
Lufthansa Technik**

Georgios Ouzounidis, Senior Director Corporate Sales Europe at Lufthansa Technik

operators in Europe with the agility and speed to keep up with their growth. In addition, there should be opportunities for cabin interior modification specialists to take advantage of increased demand for cabin reconfigurations and upgraded Wi-Fi installations as aircraft are brought back to service from storage," Berger tells.

Since the UK left the European Union, the logistics between the UK and Europe may not see increased delays, since Authorized Economic Operator [AEO] status will be largely recognised in the foreseeable future, informs Slimani from IBA. "Those that are slow to achieve AEO status may hand some advantage to their competitors, but one must trust that in an international market, lobbyists on both sides will make it clear that any punitive measures will be counterproductive."

Aircraft parts are in tariff-free circulation within the EU and future taxation is key, Slimani states. He says the vast majority of rotatable aftermarket material is sourced from aircraft part outs, so it is unknown if tariff changes

will have an effect yet. "Operators have been foresighted enough to set up entities either side of the UK and the EU region in anticipation of Brexit turmoil. Similarly, operators have commercial pressures that outweigh national allegiance when it comes to expenditure on maintenance. We suspect predictive maintenance and 'just on time' service level agreements will be reviewed closely as this relationship stabilises, since reducing replenishment delays can reduce inventory volume held, to free up capital."

Dealing with bankruptcies and closures

During the pandemic around seven airlines ceased operations in Europe, many others reduced the fleet size significantly, so for MRO companies, a smaller fleet translates into less work. As a recent report by Oliver Wyman suggests, demand is expected to be 33% or \$60 billion, below combined pre-Covid projections for 2020 and 2021. While the market is beginning to recover, the report says the long-term MRO growth trend is now roughly half of

“Demand will come back into the market and with that, also the demand for MRO.”

Olaf Hoftijzer, AFI KLM E&M



Experts foresee a quick recovery, specifically for narrowbody fleets.
Photo: AFI KLM E&M

pre-Covid expectations.

Since almost a decade there is a continuous debate about consolidation of the airline industry in Europe. “Yes, some airlines ceased operations during the Covid pandemic, but we also see many start-up airlines that are about to enter the market without the burden of debts and expensive lease contracts,” says Ouzounidis from Lufthansa Technik. However, he points out that it will take a few years to get the traffic back up. He adds: “The MRO spend is currently around 40% lower compared to pre-pandemic resulting in an overcapacity on certain areas, for instance engines. We forecast some significant increase on MRO spend for 2022, but on an overall perspective it will take until 2024 to reach the pre-pandemic volume.”

Slimani at IBA reckons the typical consolidation in a down turning market has largely been prevented and many

investors appear to be on standby, seeking opportunities to support MRO growth or acquire distressed assets. He feels the yield volatility in supply and demand means timelines for returns on investment need to be flexible. The aftermarket and MRO are only a reflection of the utilisation and demand – “We know there is pent up demand for travel, which will be positive for the sector if consumers are still able to afford to do so.”

With some airlines having shut down, several MROs like AFI KLM E&M also see opportunities with the new start-ups. In general, Hoftijzer thinks demand will come back into the market and with that, also the demand for MRO. “We do expect a difference in recovery for narrowbody and widebody aircraft, depending on the pace of the global vaccinations and in consequence with the opening of borders.”

Fleet profiles have clearly changed; life cycles have accelerated, and with final retirement of older or costly aircraft (Boeing 747, Airbus A340 and A380). Some mid-aged aircraft have become relatively cheap (Airbus A330, Boeing 777) and may in the end last longer in service as they end up being cost efficient.

Innovation and technology to aid recovery

The pandemic has maximised the opportunities to innovate with technology and Hoftijzer says the health crisis and the constraints linked to this situation have only accelerated what they had already undertaken at AFI KLM E&M – “Predictive maintenance is one of them, which enables operators to anticipate maintenance, avoiding unscheduled maintenance and AOG’s.” The digital tools they have developed,

like Virtual Table Inspections (VTI) are now in production and show that they can make a difference. Besides that, AFI KLM E&M continues to develop tools like Virtual Reality (VR) and Augmented Reality (AR). Looking towards the future, Hoftijzer anticipates that VR and AR will enable them to offer greater support to outstations, avoiding delays and or unnecessary AOG's.

On the product side, Lufthansa Technik were able to support customers at short notice with the temporary adaptation of repurposed passenger aircraft for cargo flights. "Strategically interesting for us is also the use of the latest mobile communications standard 5G for industrial applications," notes Ouzounidis. One application supported by this technology, VTI in the business segment for engines, benefited greatly from this technology, especially during the crisis, as it allowed Lufthansa Technik customers to be directly involved in the respective repair processes with high-resolution live video without having to travel.

Another development in recent months is the increased interest of many airlines, and of OEMs, in digital solutions, Ouzounidis continues. "Airlines are increasingly focusing on the digitalisation of their flight operations in



MROs will rely on technical innovations to develop business.
Photo: Lufthansa Technik

order to achieve further operational cost reductions. Here, predictive maintenance and integrated flight operations optimisation can usher in the next wave of cost reductions. Existing digital

products such as the AVIATAR platform deliver enormous added value for airlines. We therefore continue to invest in them despite the crisis."



European operators like Ryanair have restarted taking new deliveries.
Photo: Ryanair

Celine Buchon General Manager, Regional One

IN THE HOT SEAT.....



What attracted you to this industry?

I would say it is a combination of passion and skills. Aviation has always fascinated me. I can remember being a kid and listening to my father talk about planes and aircraft parts for hours. It is a particularly challenging industry and constantly teaches you new skills and I enjoy new challenges. The amazing part of this industry is that even while sitting behind a desk, you get to talk to people from all over the world, from different countries, religions, traditions, and you build amazing relationships with people that you may never get to meet in person.

What does a typical day involve as GM?

There is never a quiet day, and I would be worried if there was. Our business requires knowledge, experience, and fast response. I identify weakness and strategize to develop a stronger team and I review and negotiate deals and manage conflicts. The key word in being a successful team is communication, I am strong in coordinating all departments to build an efficient and effective team. I see the job of a GM as a coach with a vision and leadership skills to bring together many talented individuals and organise them to achieve better results. At the end of a busy week, I enjoy hopping on my Softail Heritage Classic HD to get some wind therapy.

Tell us about the key capabilities at Regional One?

Regional One is an asset management organisation; our strength resides in our ability to take quick actions to address market conditions and support operators with any of their regional aircraft needs. Whether it is parts, engines, or even complete aircraft, Regional One ensures we lead the market in providing competitive solutions to our operators.

How did Covid impact the aftermarket for regional aircraft?

With Covid affecting the aviation industry, it is natural the regional aviation market was also impacted. A large portion of the fleet was parked and stored. As a result, the demand for components, shop visits, speculative purchases, and trading opportunities heavily declined. Open purchase orders and new contracts were also placed on hold. To reduce spending, operators transitioned to creative solutions to keep their aircraft in the air without spending money. For example, operators would fill the need for spares by borrowing the

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INDUSTRY INTERVIEW



Members of the team at Regional One..

unit from a stored aircraft. When this option was not available, the airlines and MROs looked to the aftermarket for other solutions, i.e., exchange plus cost of repair purchases, loan purchases, loan to own purchases, and creative financing deals whereby we would provide either extended payment terms to our customers or even payment plans so that they could pay us monthly for a part until the cost of that purchase was paid down. These types of solutions worked very well for Regional One.

Providing creative support to current and even new customers we picked up during Covid and gave the customer an incentive to come to Regional. We immediately began to see a steady increase in business immediately after the shock to the industry of the initial Covid Shutdown. Customers came to us to assist them with planning for their future needs.

Covid also brought on a new trend for Regional One, we received requests for quotes on what we consider "Tier 3" parts or better known as parts that are slow movers and do not sell very often. These are the type of parts that pre-covid, most airlines, and shops would go directly to the OEM for, as it was more convenient. As a result, there would be less risk of downtime due to this type of part not being as reliable in SVC condition over the long term or not having the pedigree their quality may require on inbound. Additionally, because costs were now high in the industry, the airlines and shops began to look to the aftermarket to bring prices down, rather than going to the OEM's when they could go to the aftermarket and pay much less for the same part with a tag from an OEM or an approved MRO. This was a huge win not only for the airlines but as well for Regional One. Suddenly, we had a surge of part sales on parts that we would typically sell with less frequency. Further, because these parts were not rotatables and the repairs on these types of parts were typically lower cost repairs, we saw an increase in profit. This also helped keep the wheels turning at Regional One as we began to send parts out for repair to meet the new needs of our customers and kept business going with our partners.

Ultimately, Covid affected everyone globally, including Regional One. We are still fortunate to be a regional based business, which, as everyone knows, most airlines resorted to using their regional

planes during Covid due to fewer people travelling. As such, we continued to stay busy. Further, having talented and experienced staff helped to weather the storm.

How is Regional One preparing for recovery in the market?

We have done exceptionally well during this period and used the time to take advantage of key opportunities in the regional market. We have honed our portfolio of inventory to match specific aircraft types that have been identified as crucial to the recovery of our domestic and international airline industries. In many cases, this has meant investing in material or repairs where we see demand soon, such as on time-controlled items like propellers or landing gear where increased flying will have an immediate impact on the availability of assets.

What key trends are you seeing with aircraft redeliveries in the current environment?

With Regional One as a key player in the regional jet and turboprop market, redeliveries stabilised in fourth quarter 2020, and with domestic travel increasing - our demand for the lease of regional jet aircraft is on the rise and forecast to be encouraging in the third and fourth quarters of 2021.

What is your best tip for regional operators looking for cost effective inventory and component services?

New and mature operators alike should seek out the support of a flexible component services provider, like Regional One, who can customise a solution based on their specific circumstances. Asset management organisations like Regional One have the advantage of low inventory costs and the versatility to provide initial provisioning kits, leases, consignments, exchanges or cost-per-hour programmes that are uniquely tailored to the operator's fleet. Numerous variables come into play when determining the right component support package; fleet size, aircraft age, expected utilisation, dispatch availability, MEL restrictions and budget all have an impact on which setup is most effective and efficient. The best tip for operators is determine the right tool for the job with the backing of an unbiased inventory provider who can adapt quickly with the market and their fleet.



The regional jet and turboprop market is seeing a faster rebound.
Photo: ATR

»»»»→ on the move



Taco Stouten

Spairliners has welcomed two new members to its management team - **Taco Stouten** as Head of Sales & Marketing and René Popp assuming the role Head of Engineering, Asset & AOG-Desk. Taco Stouten joins the OEM-independent leader in component support for the Airbus A380 and the Embraer E-Jet family after 12-years with Airbus, where he held roles in the Sales and Marketing department as Manager for Cabin Market Insights and Airline Marketing Manager amongst others. As the new Head of Engineering, Asset & AOG-Desk, **René Popp** is bringing a wealth of industry knowledge and experience to Spairliners, after having worked at Airbus as well as SAFRAN.



René Popp



Sunitha Vegerla

Recaro Aircraft Seating (Recaro) has appointed **Sunitha Vegerla** as its new General Manager of Recaro Aircraft Seating Americas in Fort Worth, Texas, effective June 1, 2021. Vegerla is currently the Director of Quality and Process Management and a member of the Americas executive leadership team. After three years in the role, current General Manager

René Dankwerth will be transitioning into a new position as EVP Competence Center Composites at Recaro headquarters in Schwaebisch Hall, Germany. During his time as General Manager, Dankwerth ramped up the facility's production capabilities to double the sales volume in 2018-2019, while maintaining on-time delivery to customers. Vegerla has been with the seating company for nearly two decades and is responsible for helping build the program management department in the Americas.



Denise Holmes

Qatar Airways has appointed aviation industry veteran, **Denise Holmes**, as Key Account Manager for Scotland. She will be responsible for driving the airline's commercial priorities whilst building strong, sustainable relationships across the region. Denise has vast experience in the travel and aviation industry, spending almost 20 years with Thomas Cook in Scotland.



Bill Thompson

EirTrade Aviation, the aviation technical asset services and trading company, has opened a new facility in Dallas, Fort Worth, Texas. The 22,000 ft² facility will be headed by **Bill Thompson** who joined EirTrade in April 2021 and will complement EirTrade's existing operations in Europe and Asia. Despite having opened its doors only last month, EirTrade

shortly expects to receive its first CF6-80C2, RB211 and CFM56-7B engines into the facility.



Randy Miller

West Star Aviation has named **Randy Miller** as Technical Sales Manager for the Challenger/Global division at its Grand Junction, CO (GJT) location. Miller has over 25 years of aviation experience, previously working at StandardAero, Textron, Western Aircraft and West Star. He restores and flies antique aircraft, including a 1942 450hp Boeing Streamman and a 1946 Aeronca 7AC. He provides scenic rides and performs aerobatics via his personal Vintage Aviation business.



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