

ADVANCED AIR MOBILITY

Conference 2024



ADVANCED AIR MOBILITY

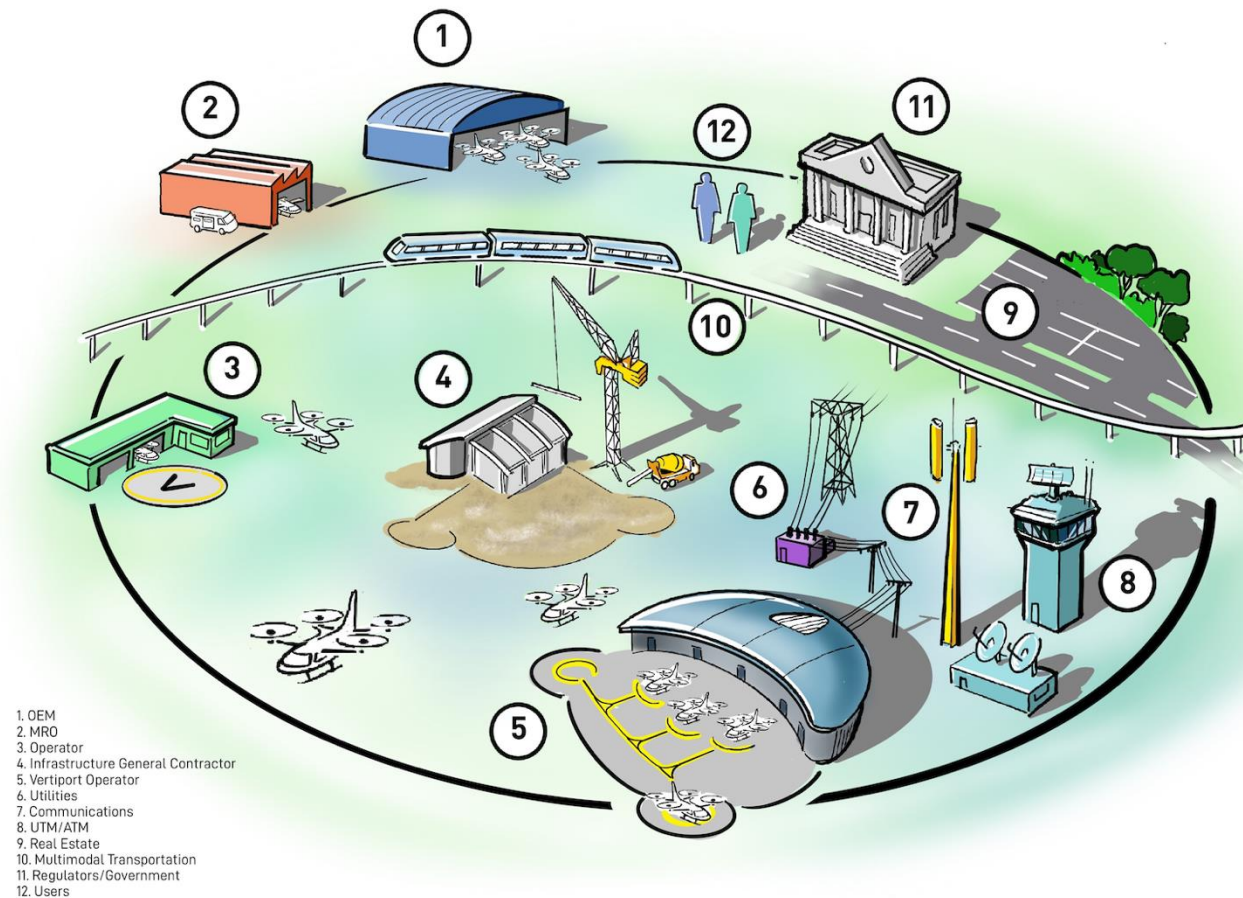
Conference 2024

Entry into Service –
Measuring Industry
Progress Across Key Use
Cases



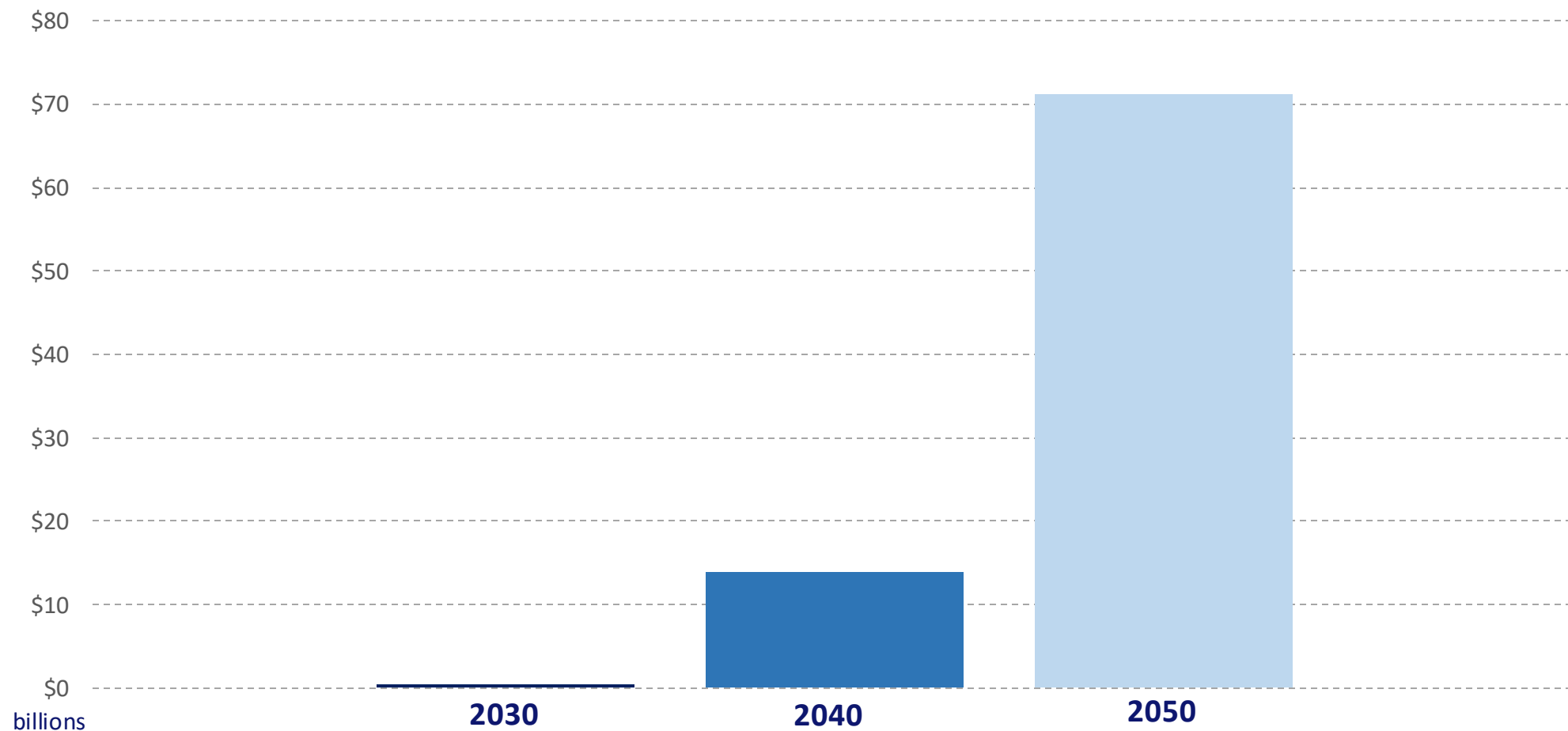


AAM Ecosystem





AAM Market in Brazil



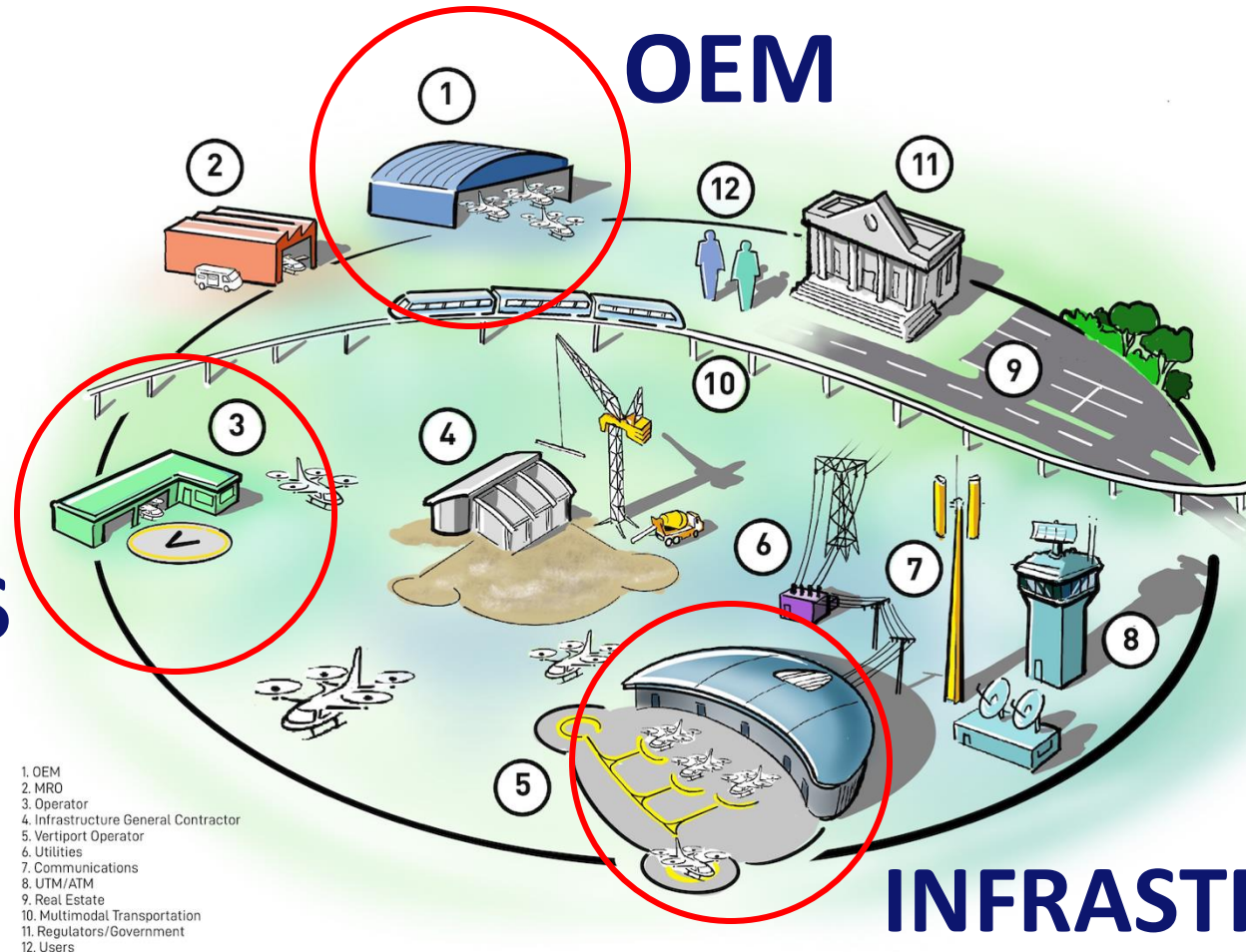


AAM Ecosystem

OEM

OPERATORS

INFRASTRUCTURE





AAM Reality Index

- FUNDING
- TEAM
- TECH PROGRESS
- CERT PROGRESS
- MANUFACTURING READINESS

OEM (stock ticker)	ARI	Funding (\$M)	Use Case	Vehicle Type	Propulsion	Operation	Vehicle	First Flight	EIS	Cert Regulator	Country
Volocopter	↔ 8.6	\$761.0*	Air Taxi	Multicopter / Lift + Cruise	Electric	Piloted	VoloCity / VoloRegion	2021 / 2022	2025 / 2026	EASA	Germany
Ehang (NASDAQ: EH)	↔ 8.5	\$240.0	Tourism, EMS, Firefighting, Air Taxi	Multicopter/Lift + Cruise	Electric	Autonomous	EH216-S/F / VT-30	2018 / 2021	2023 / -	CAAC	China
Beta Technologies	↔ 8.0	\$1,303.0*	Cargo, Regional, Air Taxi	Conventional / Lift + Cruise	Electric	Piloted	CX300 / Alia-250	2020 / 2022	2025 / 2026	FAA	USA
Joby Aviation (NYSE: JOBY)	↔ 7.9	\$2,482.9	Air Taxi	Vecored Thrust	Electric	Piloted	-	2018	2025	FAA	USA
Archer (NYSE: ACHR)	↔ 7.9	\$1,320.3	Air Taxi	Vecored Thrust	Electric	Piloted	Midnight	2023	2025	FAA	USA
AutoFlight	↔ 7.6	\$200.0*	Cargo, Air Taxi	Lift + Cruise	Electric	Piloted	Prosperity I	2022	>2026	CAAC	China
Aerofugia	↔ 7.4	\$52.0*	Air Taxi, Cargo, Tourism	Vecored Thrust	Electric	Piloted	AE200	2023	2026	CAAC	China
Wisk (Boeing)	↔ 7.4	Corporate backed	Air Taxi	Vecored Thrust	Electric	Autonomous	Generation 6	2025	-	FAA	USA
Airbus	↔ 7.4	Corporate backed	EMS, Tourism, Air Taxi	Lift + Cruise	Electric	Piloted	CityAirbus NextGen	2024	-	EASA	France
Eve Air Mobility (NYSE: EVEX)	↔ 7.2	\$611.7	Air Taxi	Lift + Cruise	Electric	Piloted	Eve	2025	2026	ANAC	Brazil
Vertical Aerospace (NYSE: EVTJ)	↔ 7.1	\$406.8	Air Taxi, Cargo, EMS	Vecored Thrust	Electric	Piloted	VX4	2023	2027	CAA	UK
Lilium (NASDAQ: LILM)	↔ 7.0	\$1,456.3	Regional, Cargo, Biz Av	Vecored Thrust	Electric	Piloted	Jet	2025	2026	EASA	Germany
SkyDrive	↔ 6.7	\$258.0	Air Taxi, Tourism, EMS	Multicopter	Electric	Piloted	SKYDRIVE	2024	2026	JCAB	Japan
Supernal	↔ 6.5	Corporate backed	Air Taxi, Cargo	Vecored Thrust	Electric	Piloted	S-A2	2024	2029	FAA	South Korea
Volant Aerotech	↔ 6.5	\$155.8	Air Taxi, EMS, Tourism	Lift + Cruise	Electric	Piloted	VE25	2023	2027	CAAC	China
Alaka'i Technologies	↔ 6.3	\$60.0	Air Taxi, Cargo, EMS	Multicopter	H2 Fuel Cell	Piloted	Skai	2022	2026	FAA	USA
Eviation	↔ 6.2	\$200.0	Regional, Cargo, Biz Av	Conventional	Electric	Piloted	Alice	2022	-	FAA	USA
Ascendence	↔ 6.2	\$71.3	Regional, Cargo	Lift + Cruise	Hybrid	Piloted	Alea	2025	2027	EASA	France
Overair	↔ 6.2	\$170.0	Air Taxi, Cargo, EMS, Tourism	Vecored Thrust	Electric	Piloted	Butterfly	2024	2028	FAA	USA
TCab Tech	↔ 6.2	\$44.7*	Air Taxi, Tourism	Vecored Thrust	Electric	Piloted	E20	2023	2027	CAAC	China
REGENT	↔ 6.1	\$90.0*	Regional	Augmented Lift	Electric	Piloted	Viceroy	2024	2026	US Coast Guard	USA
eAviation (Textron)	↔ 5.9	Corporate backed	EMS, Air Taxi, Cargo	Vecored Thrust	Electric	Piloted	Nexus	2025	2030	FAA	USA
Dufour Aerospace	↔ 5.7	\$11.0*	EMS, Regional	Vecored Thrust	Hybrid	Piloted	Aero3	-	-	EASA	Switzerland
Honda Motor Company	↔ 5.5	Corporate backed	Air Taxi	Lift + Cruise	Hybrid	Piloted	-	2024	2030	FAA	Japan
Electra	↔ 5.4	\$134.0*	Regional, Cargo	Augmented Lift	Hybrid	Piloted	EL-2 Goldfinch	2023	2028	FAA	USA
Heart Aerospace	↔ 5.1	\$149.7	Regional	Conventional	Electric/Hybrid	Piloted	ES-30	2025	2028	EASA	Sweden
Jaunt Air Mobility	↔ 4.4	\$3.1	Air Taxi, Cargo	Lift + Cruise	Electric	Piloted	Journey	2025	2028	Transport Canada	USA
Volkswagen	↔ 3.7	Corporate backed	Air Taxi	Lift + Cruise	Electric	Autonomous	V.MO	2023	2027	CAAC	Germany / China

The asterisk in the Funding column indicates additional undisclosed funds

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AAM Infrastructure Readiness Index

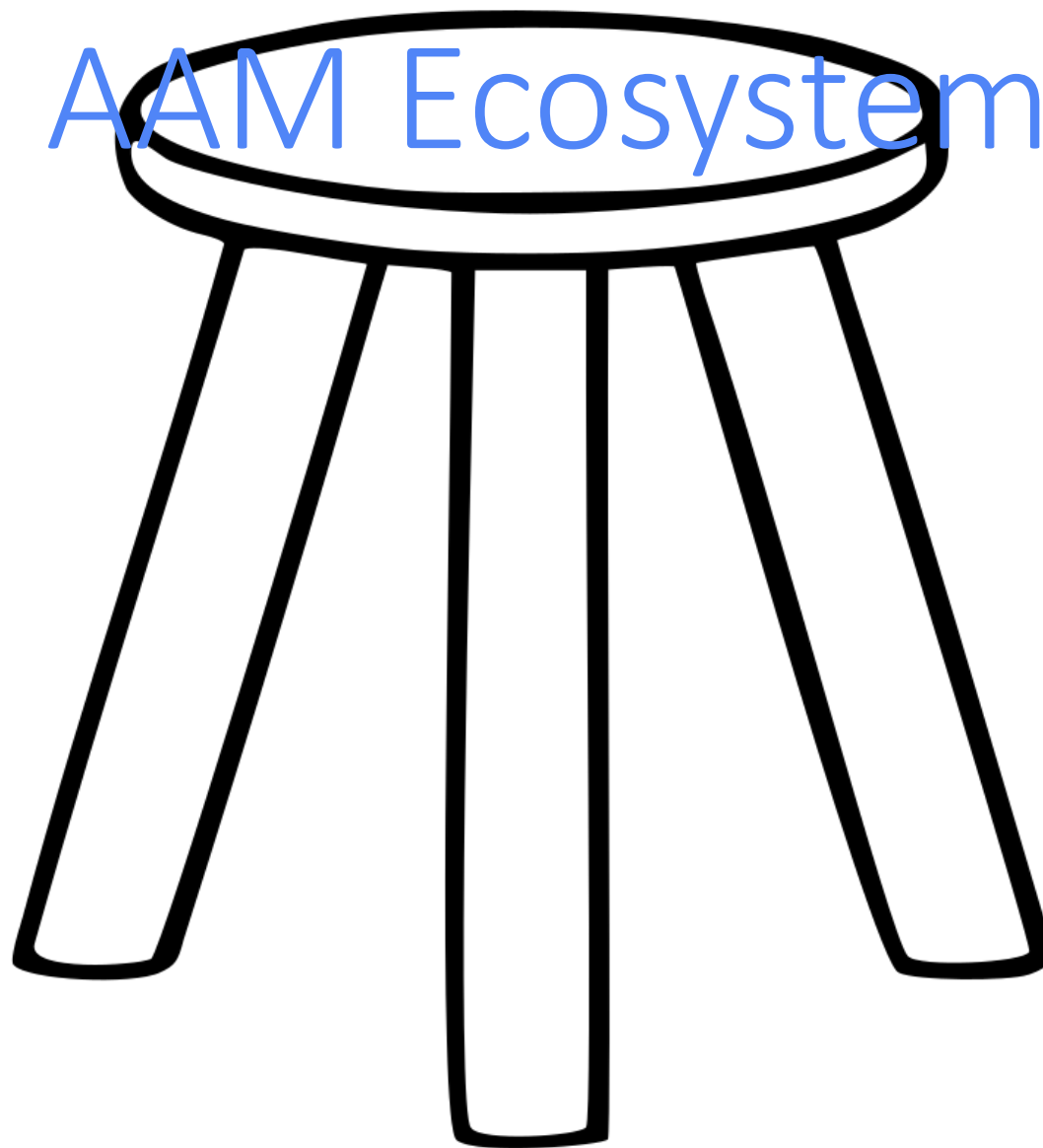
- FUNDING
- TEAM
- PARTNERSHIPS
- REGULATIONS
- DEPLOYMENT

Company		AIR	Funding (\$M)	Use Case	OEM Partners	EIS Cities	Vertiport Prototype	Vertiport EIS	Country
Skyports	↔	7.2	\$141.0	Air Taxi, Cargo	Archer, Beta Technologies, Eve Air Mobility, Joby Aviation, Lilium, Vertical Aerospace, Volocopter, Wisk	Dubai	2019	2025	UK
Beta Technologies	↔	7.1	\$1,303.0	Regional, Cargo	Archer, Beta Technologies	South Burlington, Plattsburgh	2019	2022	USA
Groupe ADP	↔	7.1	Corporate backed	Air Taxi	Eve Air Mobility, Lilium, Volocopter	Paris (5 locations)	2022	2024	France
UrbanV	↔	7.1	Corporate backed	Air Taxi, Tourism, Cargo	Ascendence, Lilium, Volocopter	Rome, Cote Azur, Venice, Bologna	2022	2024	Italy
Atlantic Aviation	↔	6.7	Corporate backed	EMS, Air Taxi, Cargo	Archer, Beta Technologies, Lilium	Northeast US, Los Angeles, San Francisco, Miami	-	2023	USA
BlueNest	↔	6.5	Corporate backed	Cargo, Tourism, Air Taxi	Crisalion, Ehang, Eve Air Mobility, Plana	Andalucia, Costa Rica, Portugal	2023	2025	Spain
Urban-Air Port	↔	6.5	\$38.1	Air Taxi, Cargo	Supernal	Sacramento, Los Angeles, Stephenville (NL)	2022	2024	UK
Ferrovial	↔	6.5	Corporate backed	Regional, Air Taxi	Eve Air Mobility, Lilium, Vertical Aerospace	Florida, New York	-	2026	Netherlands
Air Chateau	↔	6.1	\$27.2		Archer, Lilium	6 locations in the UAE, Maldives	-	2026	UAE
Clay Lacy Aviation	↔	6.1	Corporate backed	Air Taxi	Eviation, Joby Aviation, Overair, Supernal	Orange County (SNA), Van Nuys (VNY)	-	2025	USA
Munich Airport International	↔	5.9	Corporate backed	Regional, Air Taxi	Airbus, Lilium	Bavaria locations	-	2026	Germany
Signature Aviation	↔	5.7	Corporate backed	Air Taxi	Archer, Beta Technologies	Newark (EWR), Chicago O'Hare (ORD), Oakland (OAK)	-	2025	USA
Volatus Infrastructure & Energy Solutions	↔	5.6	TBD	Air Taxi, Cargo, EMS, Regional, Tourism	ACE VTOL, AIR, Crisalion, Eve Air Mobility, Leo Flight, LYTE Aviation, Plana, SkyDrive	Oshkosh, Bellefonte	-	2024	USA
Skyway	↔	4.7	\$3.0	Air Taxi, Regional, Cargo	Eve Air Mobility, Traverse Aero	Texas, California	-	2025	USA
Kookiejar	↔	3.7	\$1.1	Tourism, Cargo, Air Taxi	Crisalion, Eve Air Mobility, LYTE Aviation	Norkoping, Dubai, Monaco	2023	2024	Sweden
SkyScape	↔	2.7	\$0.5	Cargo, Air Taxi	Plana	-	2023	2025	Japan
Skyportz	↔	2.3	\$1.5	Regional, Air Taxi	Crisalion, Dufour Aerospace, Electra, FlyNow	Sydney, Melbourne, Brisbane	-	2024	Australia

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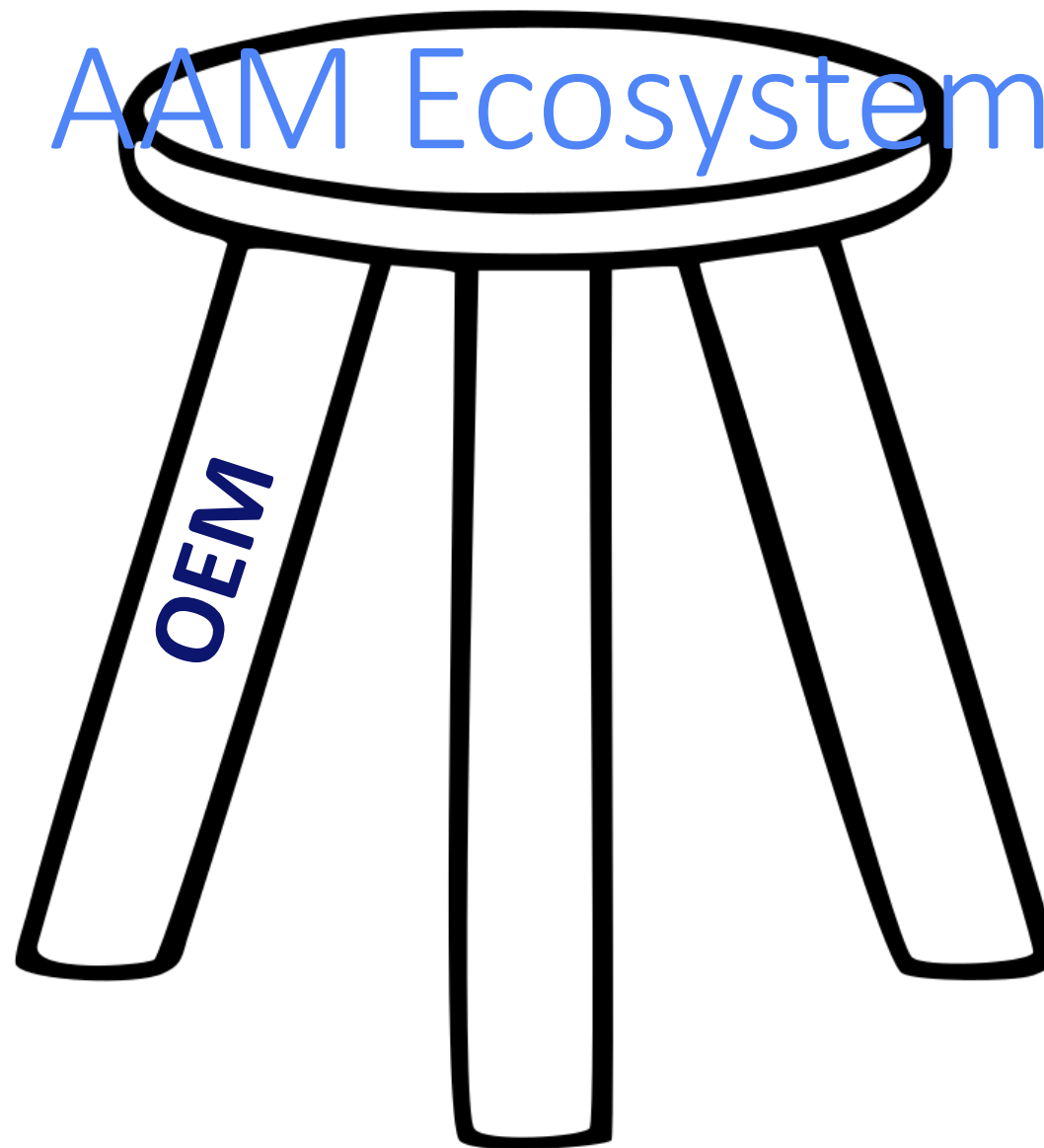


AAM Ecosystem



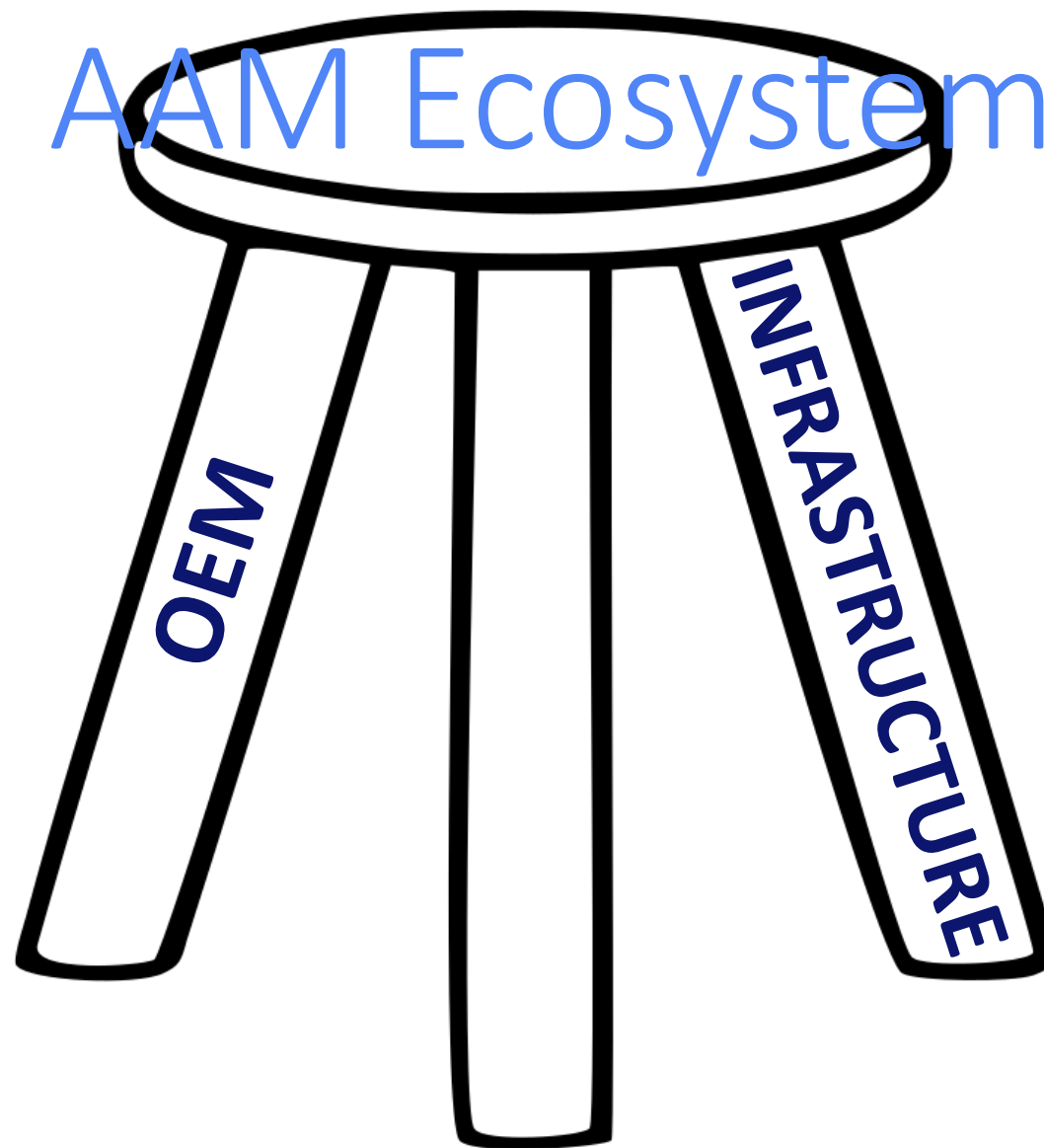


AAM Ecosystem



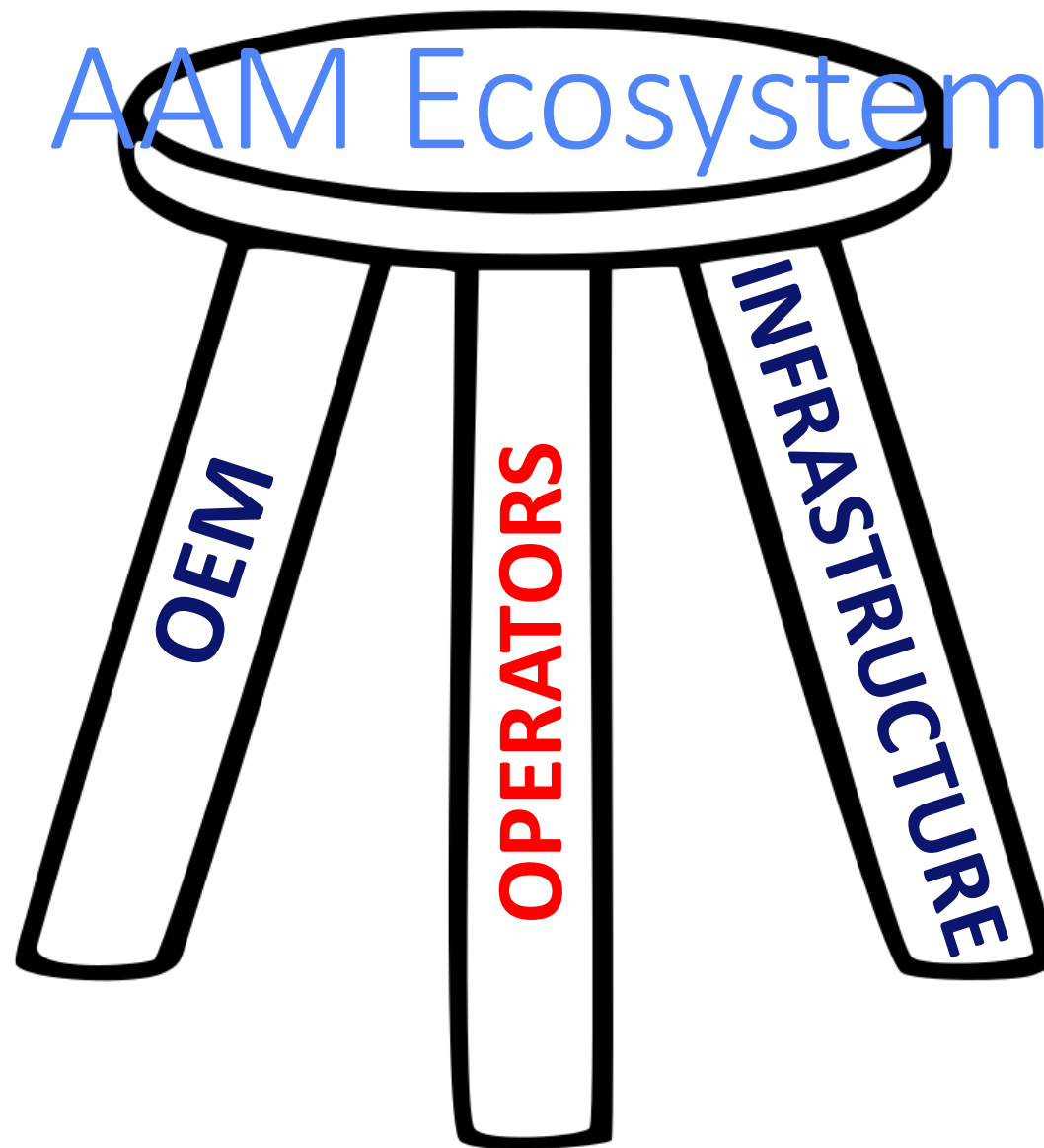


AAM Ecosystem





AAM Ecosystem





Use Cases

UAM

RAM

EMS/PUBLIC SERVICES

CARGO

TOURISM/SIGHTSEEING

MILITARY



One INDEX for all operators?





Passenger Use Cases

UAM

2 – 60 miles

All electric

RAM

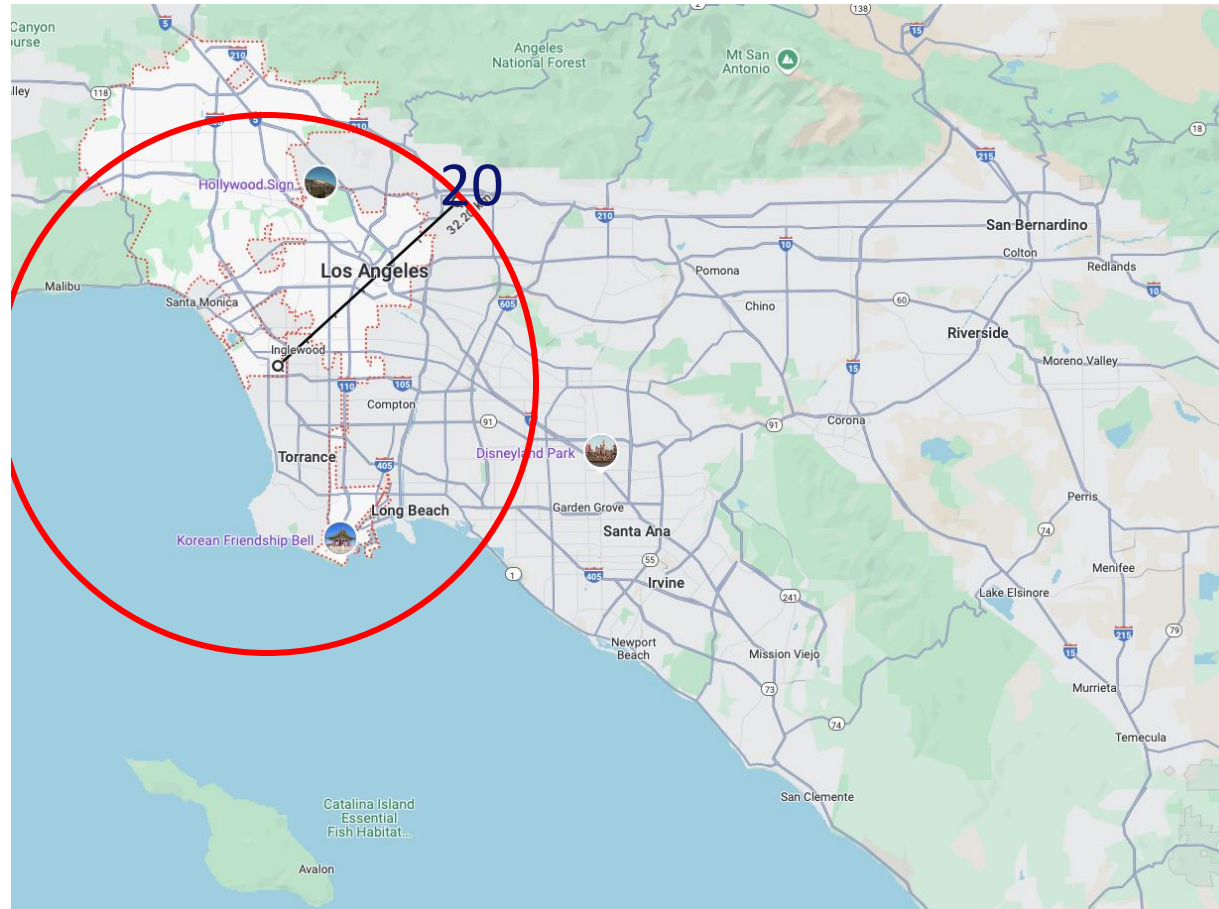
100 – 300 miles

Hybrid



Passenger Use Cases - UAM

Uber Elevate
reference
UAM mission

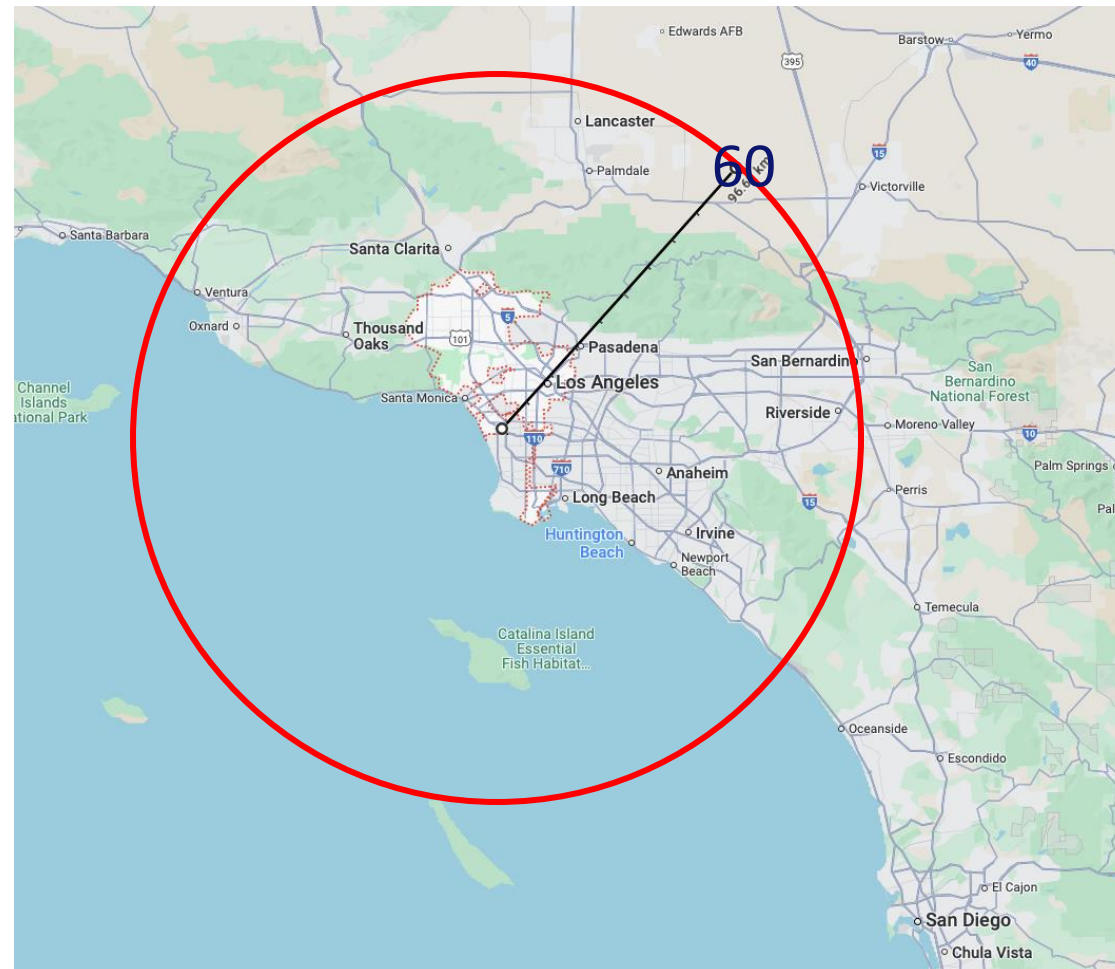


All distances measured in miles (mi)



Passenger Use Cases - UAM

Uber Elevate
Max
UAM mission

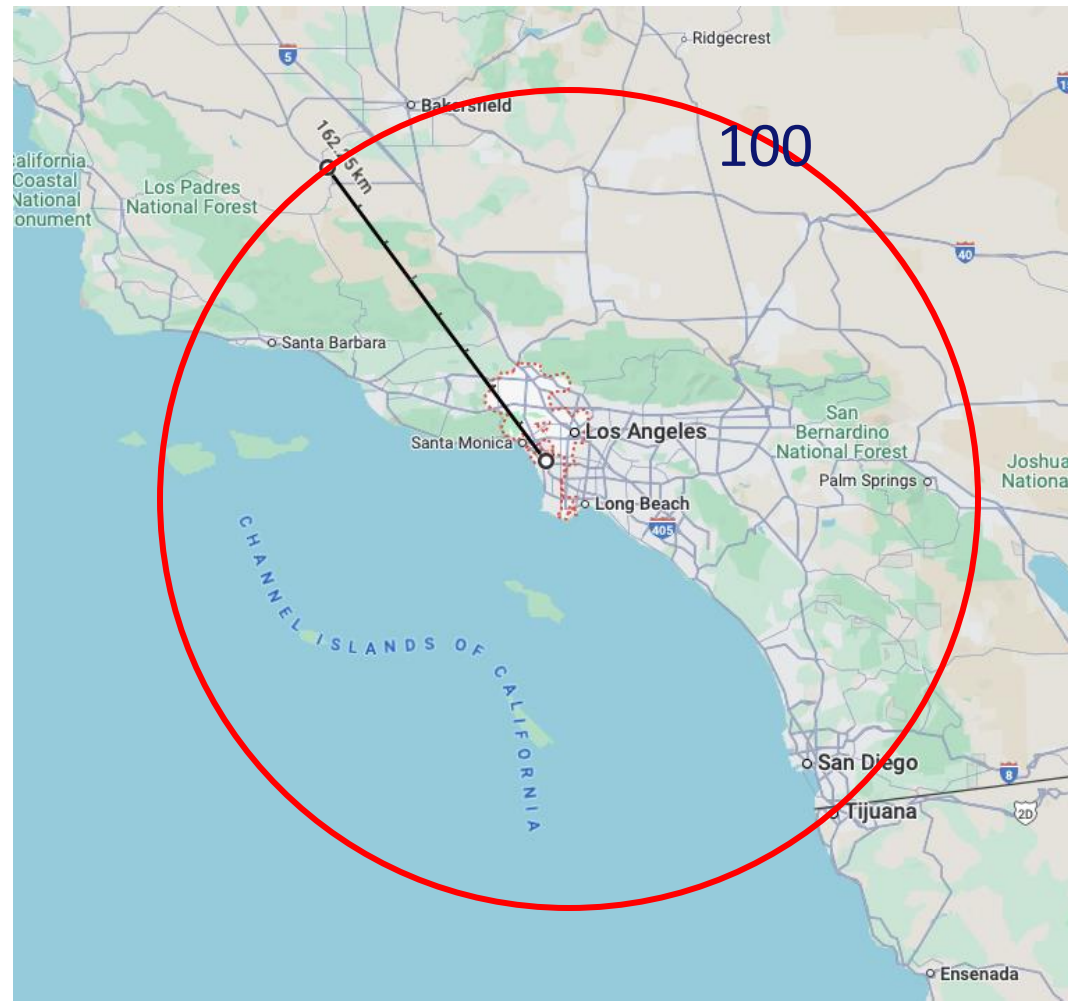


All distances measured in miles (mi)



Passenger Use Cases - UAM

Max range
UAM eVTOLs

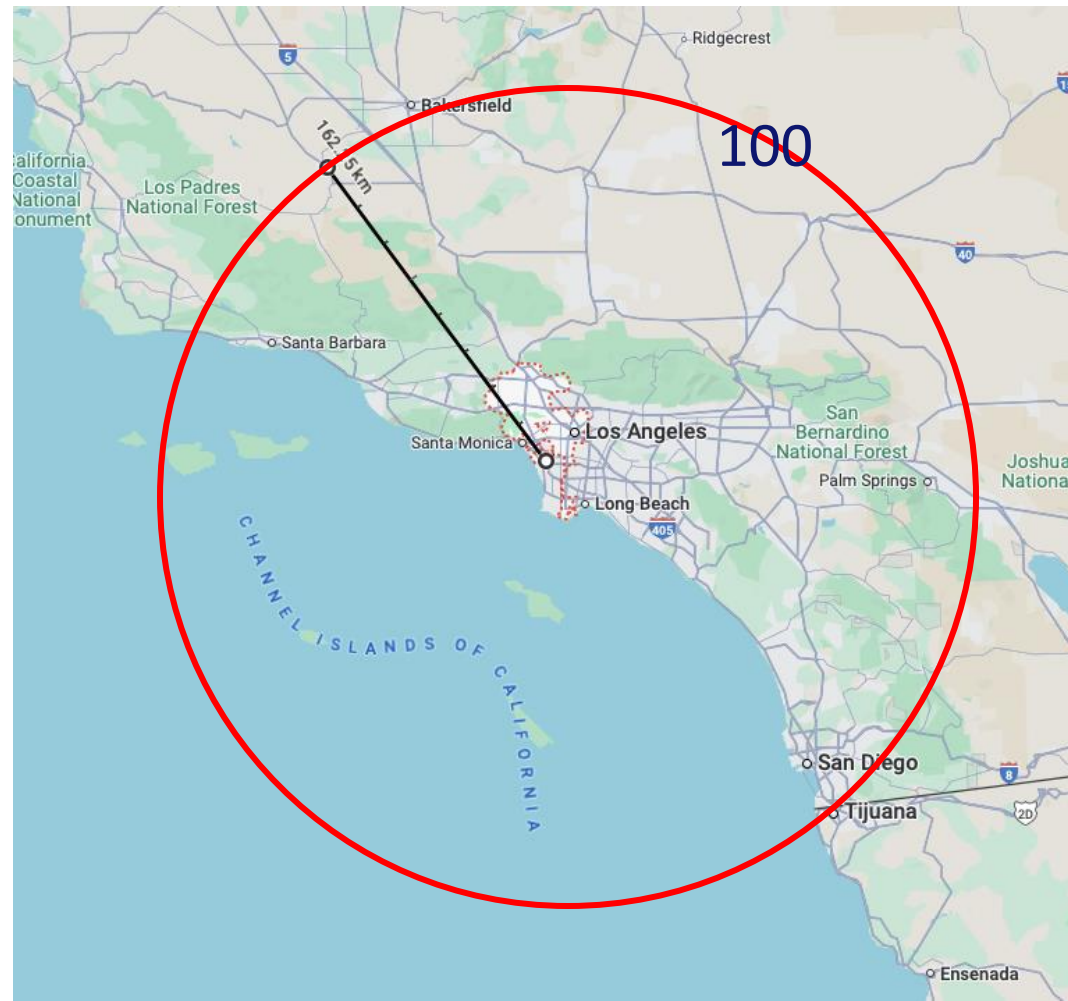


All distances measured in miles (mi)



Passenger Use Cases - RAM

Min
RAM mission

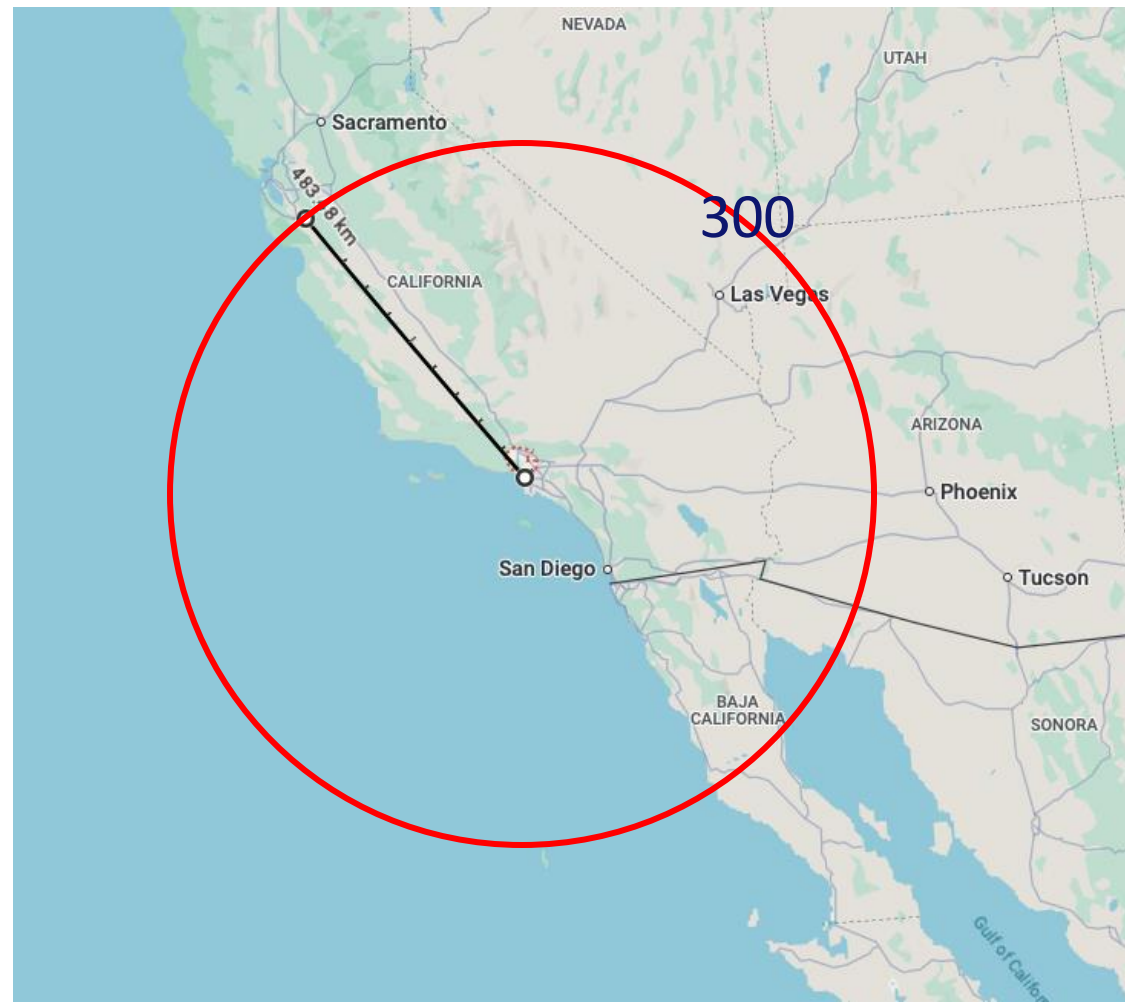


All distances measured in miles (mi)



Passenger Use Cases - UAM

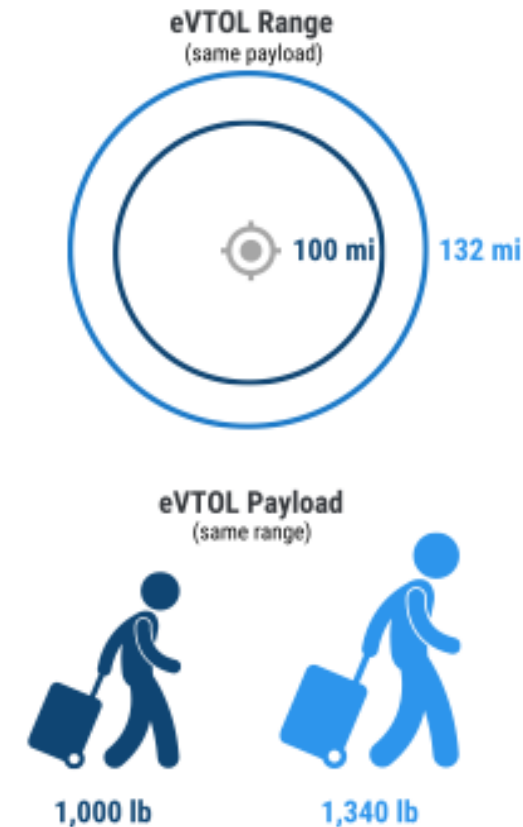
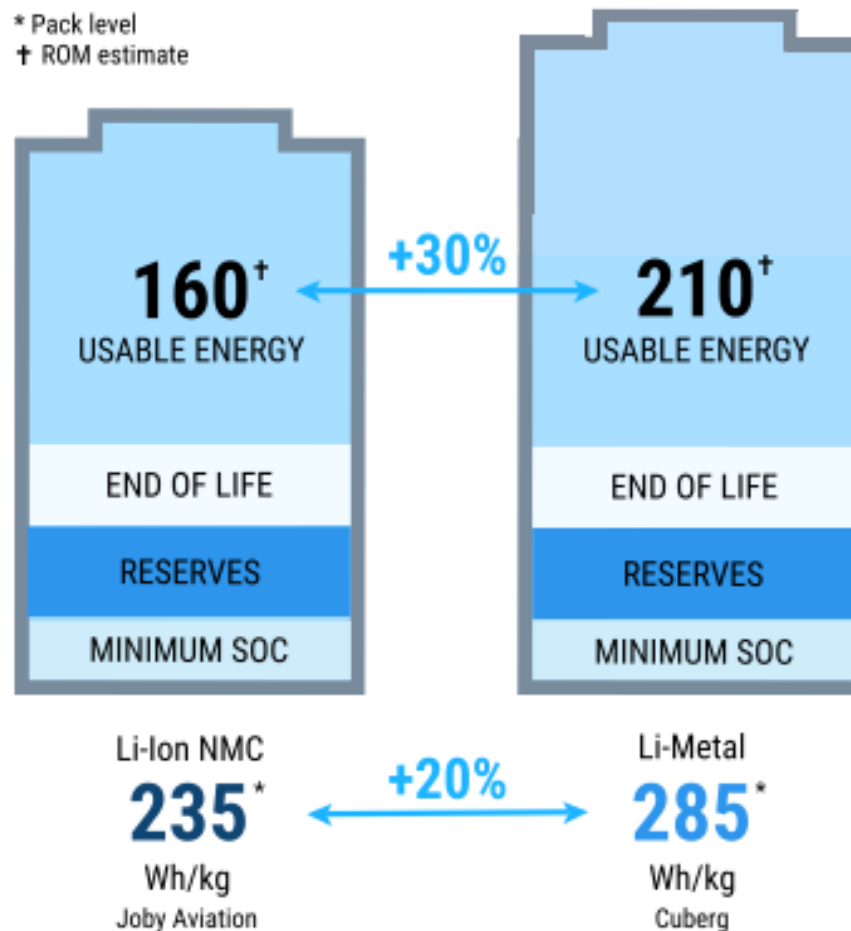
Max
RAM mission



All distances measured in miles (mi)

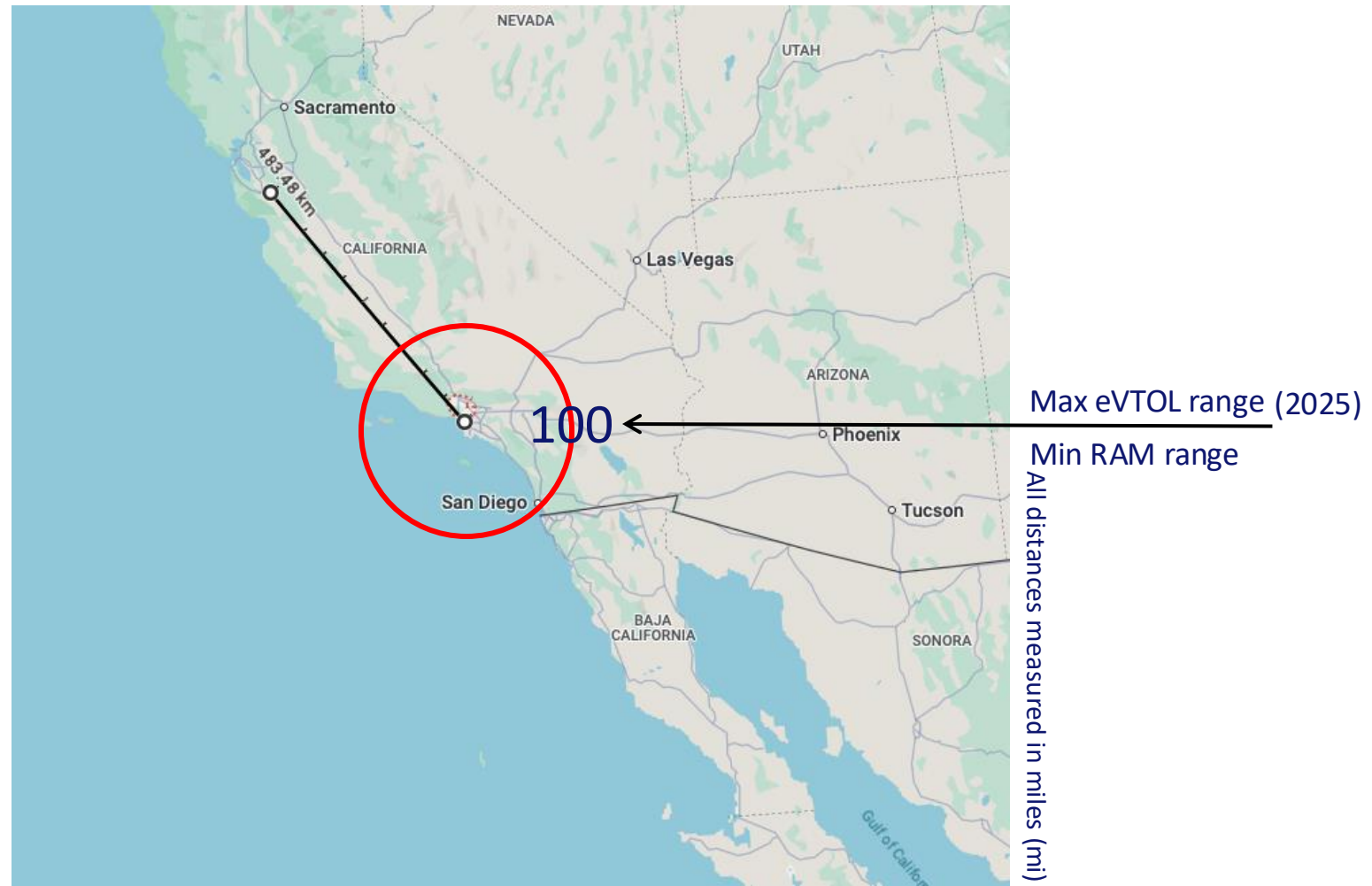


Introducing: Next Gen Batteries



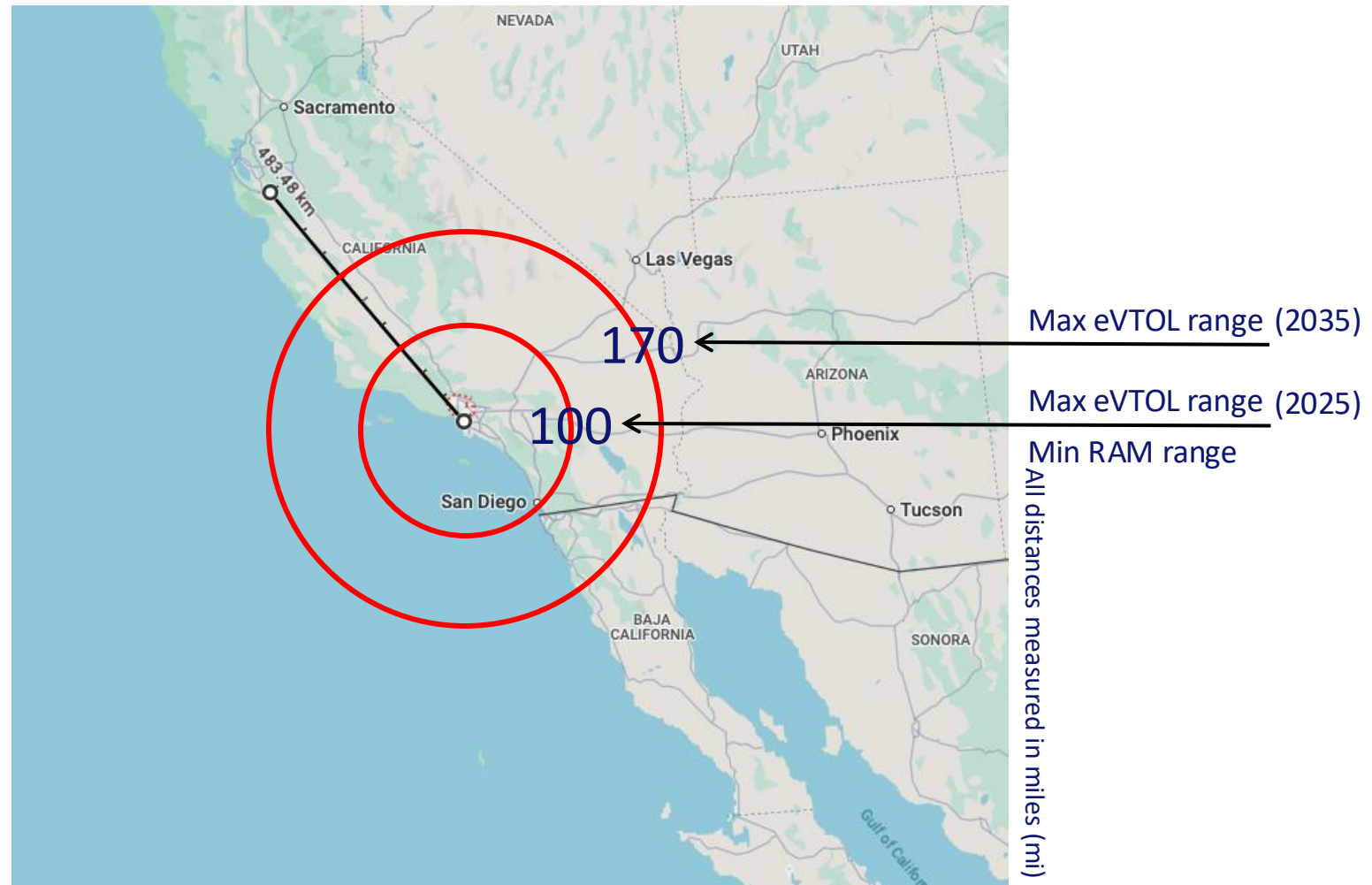


Passenger Use Cases – UAM/RAM



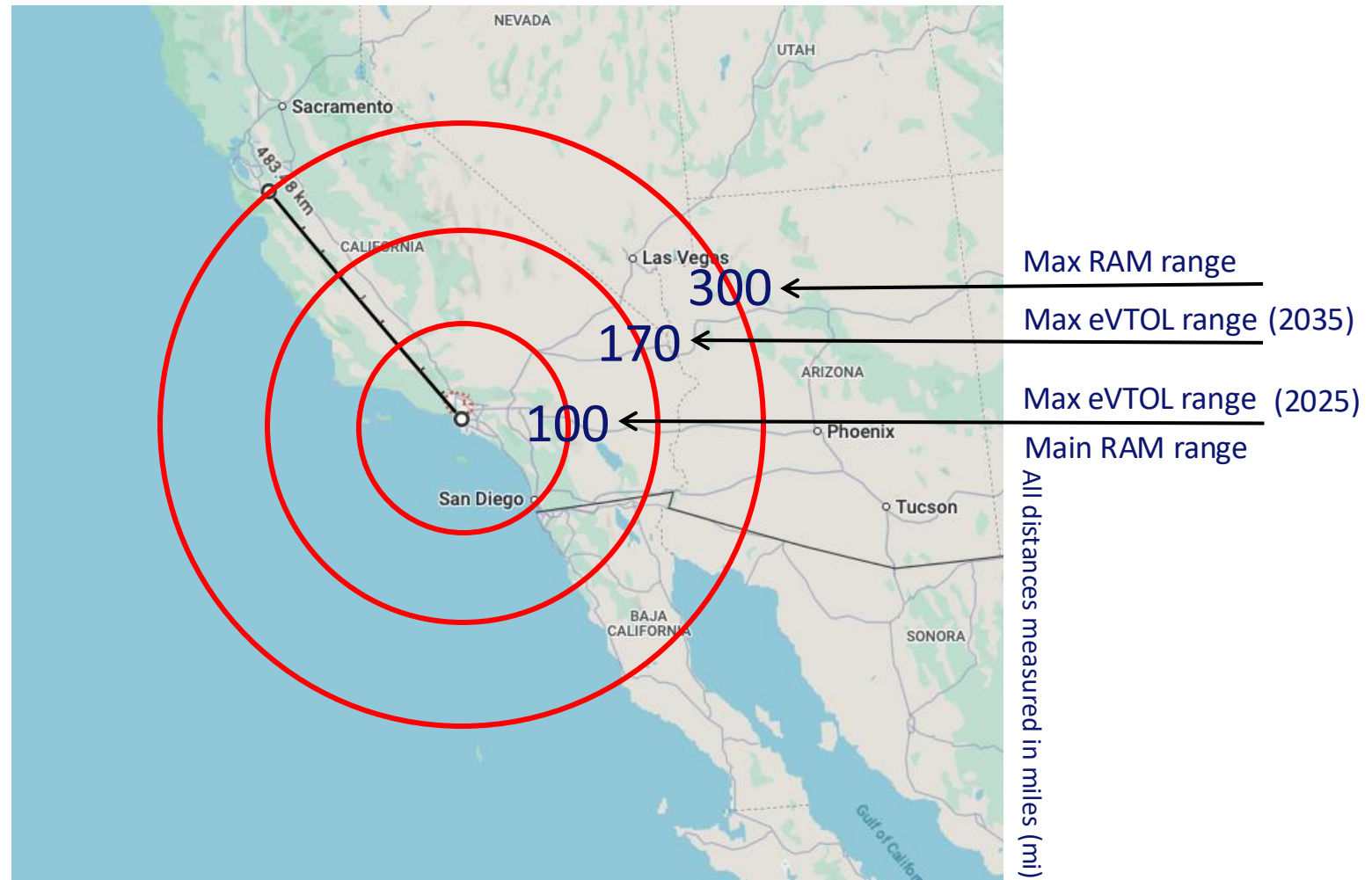


Passenger Use Cases – UAM/RAM



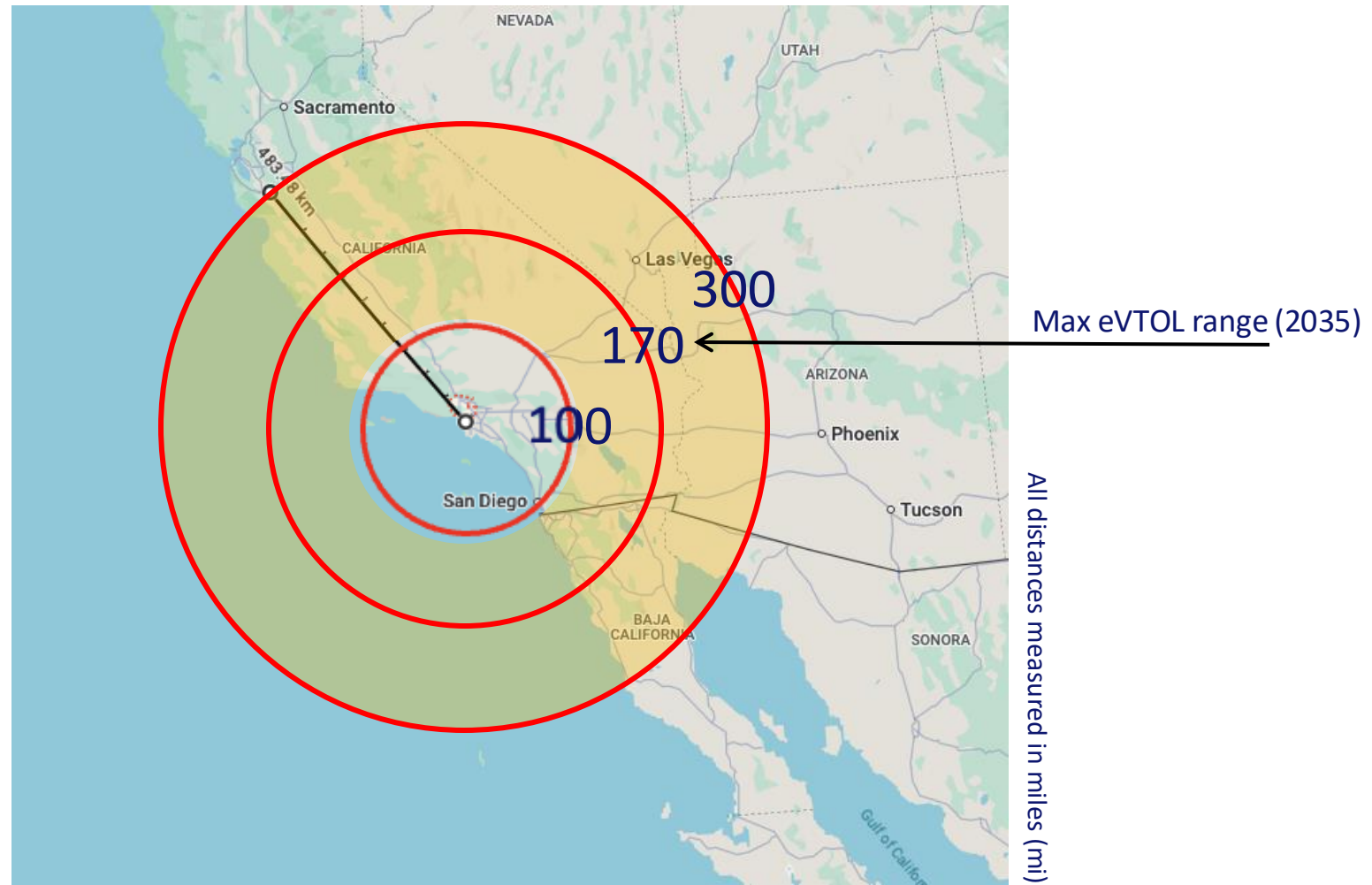


Passenger Use Cases – UAM/RAM



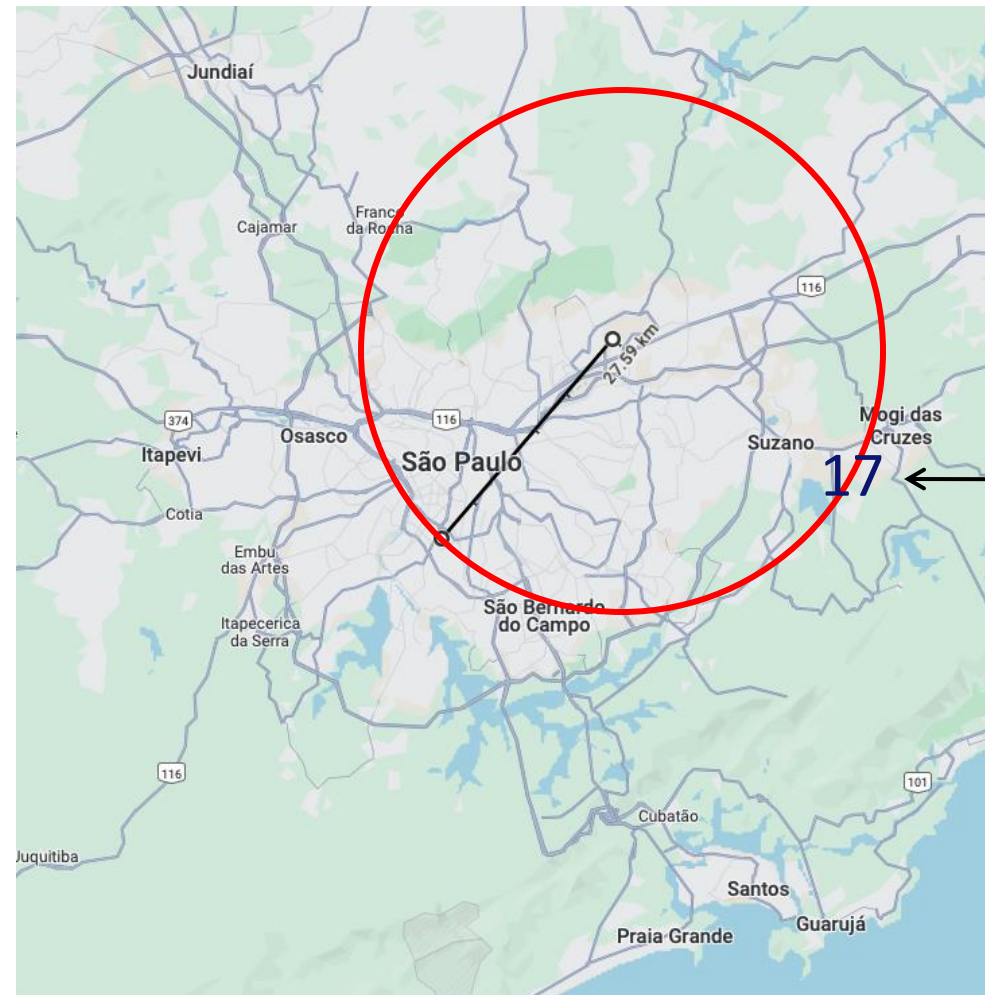


Passenger Use Cases – UAM/RAM





Passenger Use Cases – UAM

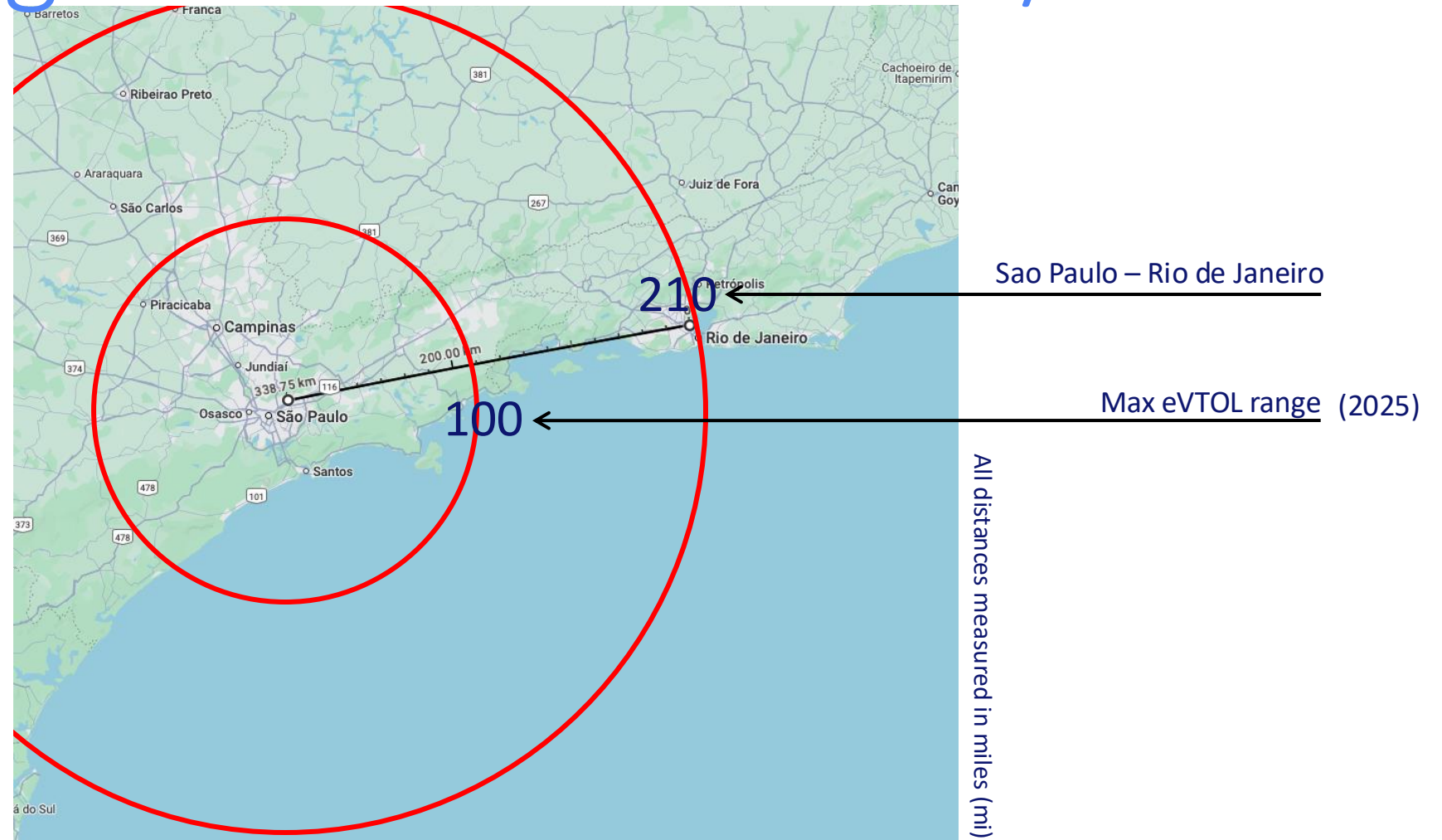


All distances measured in miles (mi)

Airport - Airport
Uber reference UAM
Mission

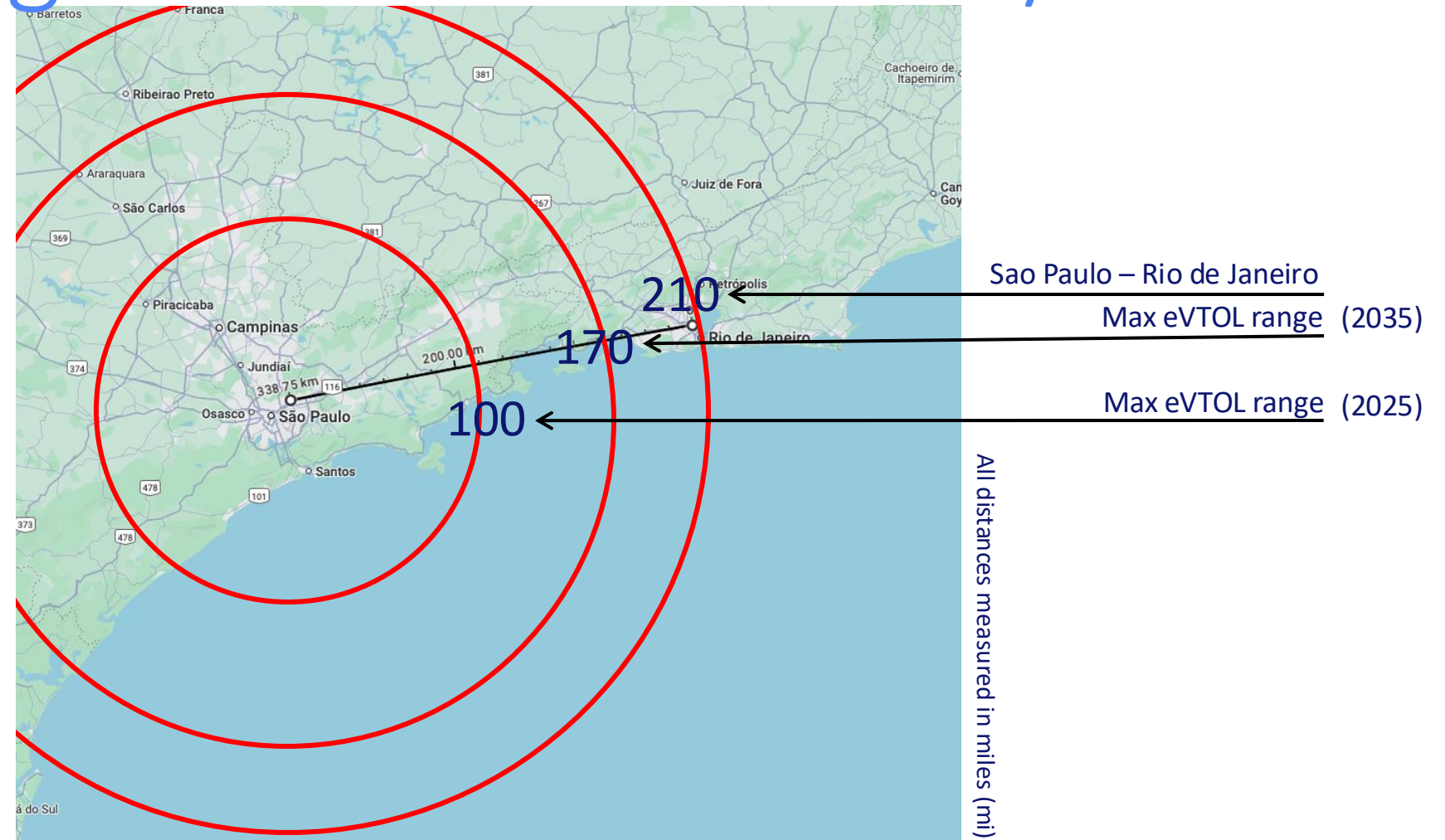


Passenger Use Cases – UAM/RAM



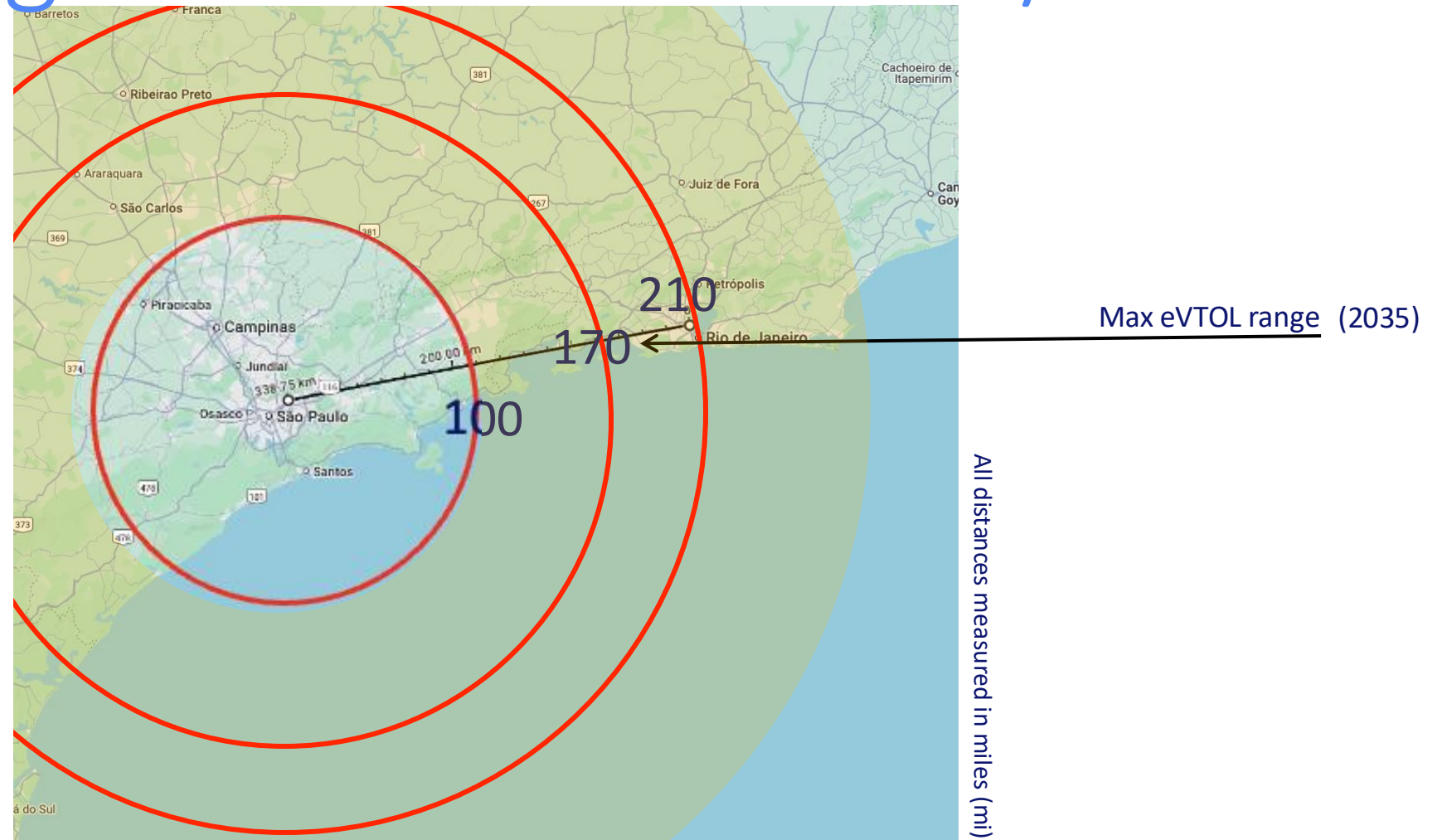


Passenger Use Cases – UAM/RAM





Passenger Use Cases – UAM/RAM





One INDEX for all operators





AAM Operators Capability Index

- FUNDING
- TEAM
- OPERATIONS READINESS
- TRAINING
- PARTNERSHIPS
- AAM SCALING

Company	AIR	Funding (\$M)	Use Case	OEM Partners	ES Cities	Vertiport Prototype	Vertiport ES	Country	
Skyports	--	7.2	\$141.0	Air Taxi, Cargo	Archer, Beta Technologies, Eve Air Mobility, Joby Aviation, Lilium, Vertical Aerospace, Volocopter, Volar	Dubai	2019	2025	UK
Beta Technologies	--	7.1	\$1,303.0	Regional, Cargo	Archer, Beta Technologies	South Burlington, Pittsburgh	2019	2022	USA
Groupe ADP	--	7.1	Corporate backed	Air Taxi	Eve Air Mobility, Lilium, Volocopter	Paris (5 locations)	2022	2024	France
UrbanV	--	7.1	Corporate backed	Air Taxi, Tourism, Cargo	Assendence, Lilium, Volocopter	Rome, Côte d'Azur, Venice, Bologna	2022	2024	Italy
Atlanta Aviation	--	6.7	Corporate backed	EMS, Air Taxi, Cargo	Archer, Beta Technologies, Lilium	Northeast US, Los Angeles, San Francisco, Miami	-	2023	USA
Bluebird	--	6.5	Corporate backed	Cargo, Tourism, Air Taxi	Crisation, Ehang, Eve Air Mobility, Pansa	Andalusia, Costa Rica, Portugal	2023	2025	Spain
Urban-Air Port	--	6.5	\$35.1	Air Taxi, Cargo	Supernal	Sacramento, Los Angeles, Stephenville (NL)	2022	2024	UK
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Clay Lacy Aviation	--	6.1	Corporate backed	Air Taxi	Eviation, Joby Aviation, Oneworld, Supernal	Orange County (BNA), Van Nuys (VNY)	-	2025	USA
Munich Airport International	--	5.9	Corporate backed	Regional, Air Taxi	Airbus, Lilium	Bavaria locations	-	2026	Germany
Signature Aviation	--	5.7	Corporate backed	Air Taxi	Archer, Beta Technologies	Newark (EWR), Chicago O'Hare (ORD), Oakland (OAK)	-	2025	USA
Volatus Infrastructure & Energy Solutions	--	5.6	TBD	Air Taxi, Cargo, EMS, Regional, Tourism	ACE VTOL, AIR, Crisation, Eve Air Mobility, Leo Flight, LYTE Aviation, Pansa, SkyDrive	Oakhosh, Bellefonte	-	2024	USA
Skyway	--	4.7	\$3.0	Air Taxi, Regional, Cargo	Eve Air Mobility, Traverse Aero	Texas, California	-	2025	USA
Kooker	--	3.7	\$1.1	Tourism, Cargo, Air Taxi	Crisation, Eve Air Mobility, LYTE Aviation	Norrköping, Dubai, Monaco	2023	2024	Sweden
SkyScape	--	2.7	\$0.5	Cargo, Air Taxi	Pansa	-	2023	2025	Japan
Skycorpz	--	2.3	\$1.5	Regional, Air Taxi	Crisation, Dufour Aerospace, Electro, FlyNow	Sydney, Melbourne, Brisbane	-	2024	Australia

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ANAC

NATIONAL CIVIL AVIATION
AGENCY - BRAZIL

