



# Latin America Business Opportunities & Executive Leadership Roundtable

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Our objective is to contribute to the **economic and social growth** of the region through the development of a safer, more efficient and sustainable aviation in Latin American and the Caribbean.

ALTA, the association at the service of the industry, coordinates collaborative efforts across the entire value chain, from airlines to suppliers, with authorities, associations and industry stakeholders.

# Executive Committee



Luis Felipe de Oliveira



Executive Director & CEO



Pedro Heilbron



President



Andrés Conesa



Vice-presidents



Tracy Cooper



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# Full Members



# Associate Members



# Affiliate Members



accelya



AIRBUS



amadeus



BOMBARDIER



FlightGlobal



HEICO



Holland & Knight



SATAIR

SITA



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# ALTA Partners

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DI CIERO  
ADVOGADOS

# Committees and Working Groups



Fuel Committee



Aero Political and Regulatory Affairs



Safety and Emergency Response



Fraud Prevention



Environment

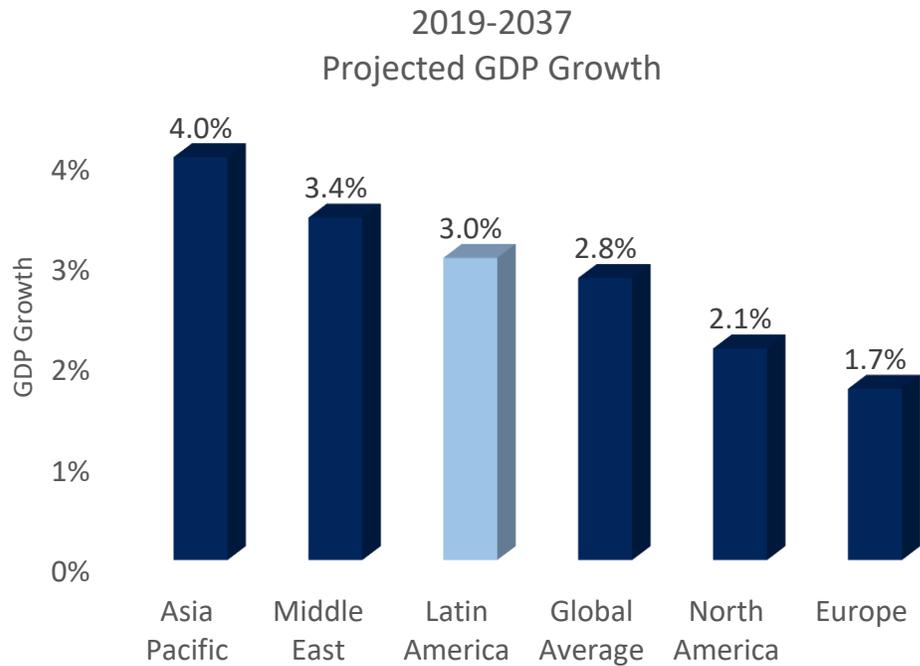


Maintenance and Procurement

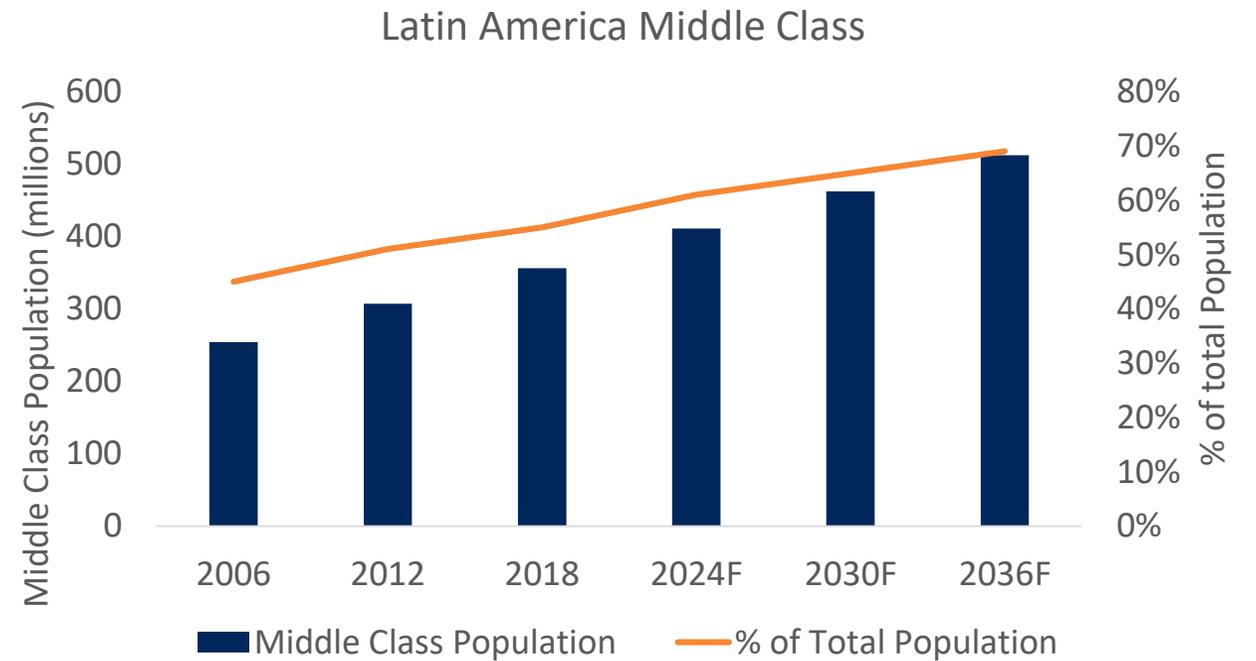


# Economic Outlook

## GROWTH IN LATIN AMERICA WILL BE ABOVE GLOBAL AVERAGE IN THE NEXT 20 YEARS



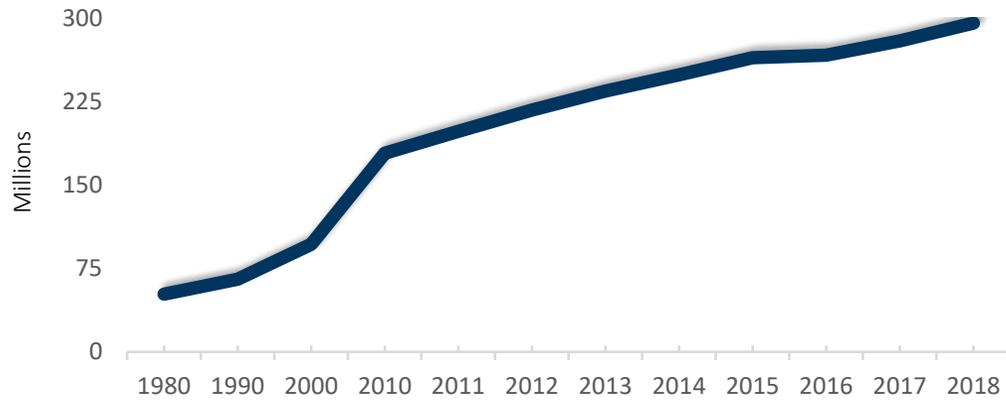
## EMERGING MIDDLE CLASS IN THE REGION REPRESENTS A BIG GROWTH POTENTIAL FOR THE AIR TRAVEL INDUSTRY



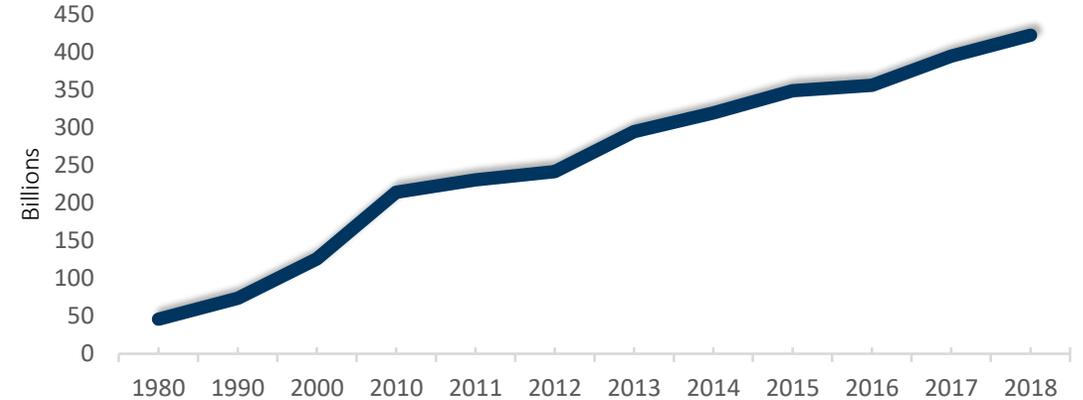
# LAC Airlines Continue to Set Multiple Traffic and Capacity Records

## 2018 marked the 15th consecutive year of traffic growth...

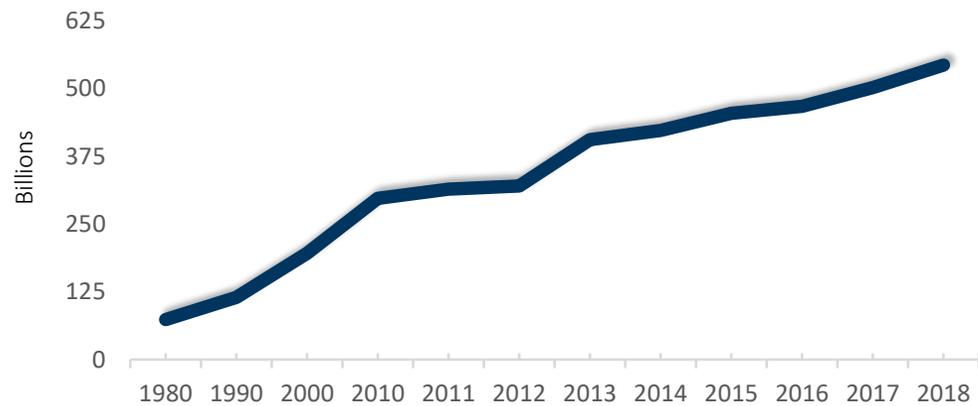
### Passengers Carried



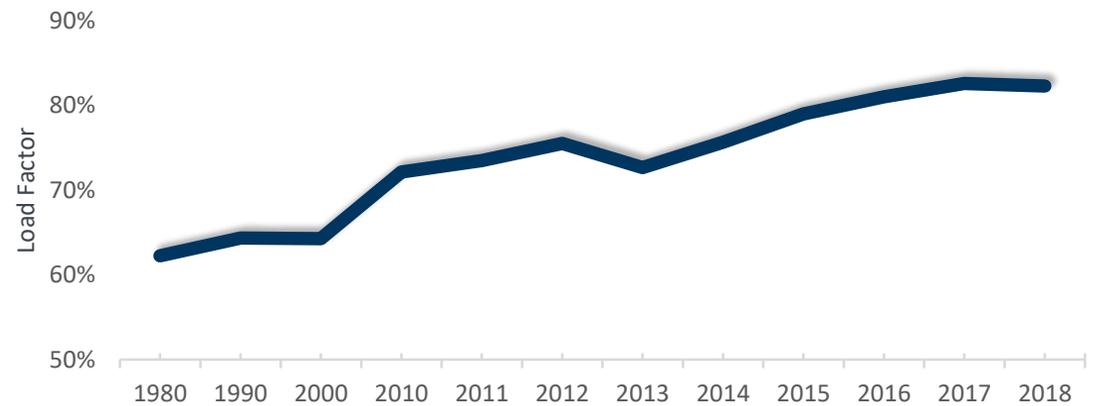
### RPK's



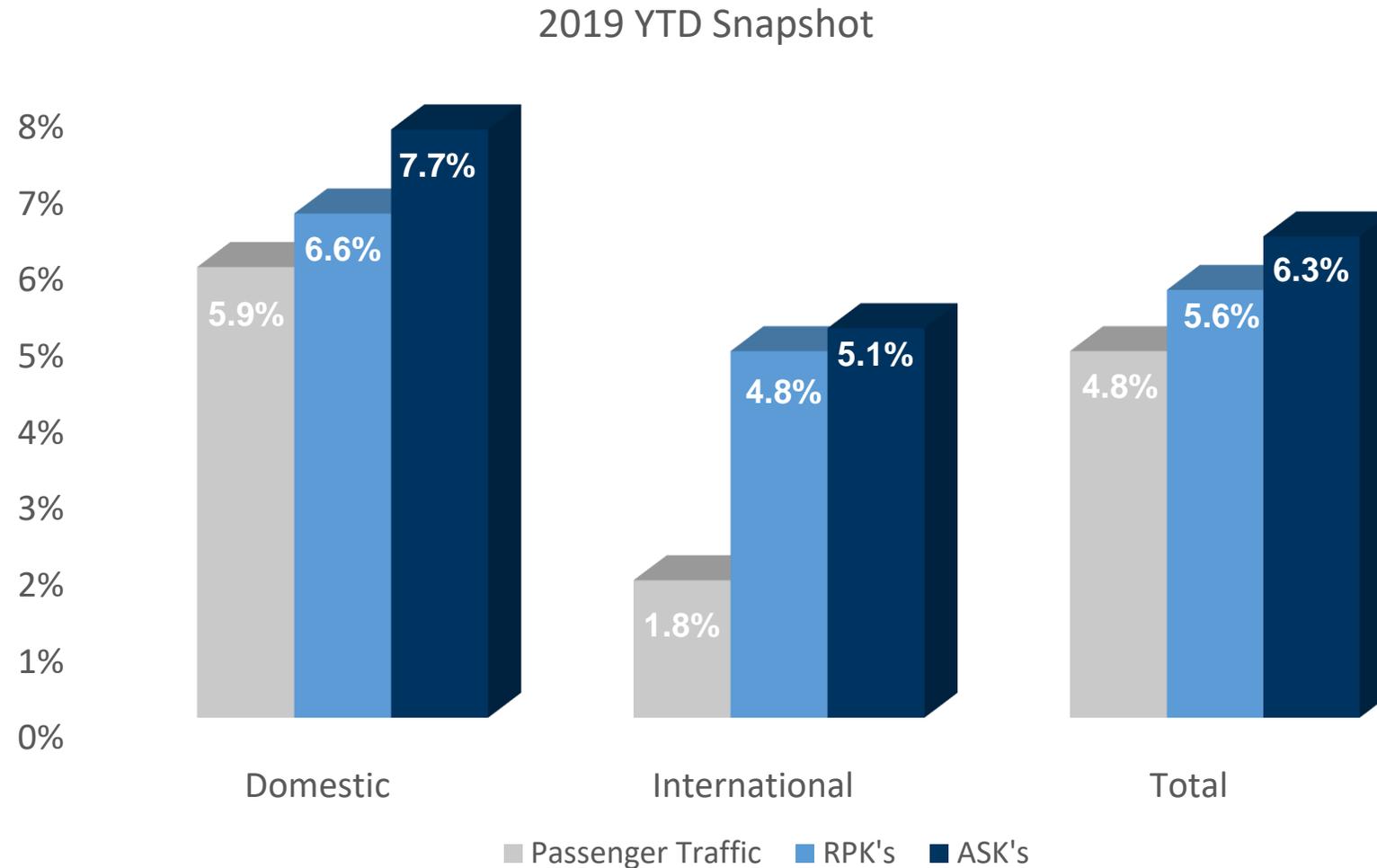
### ASK's



### Load Factor



# ...and 2019 is heading to be the 16th year of consecutive traffic growth for LAC carriers

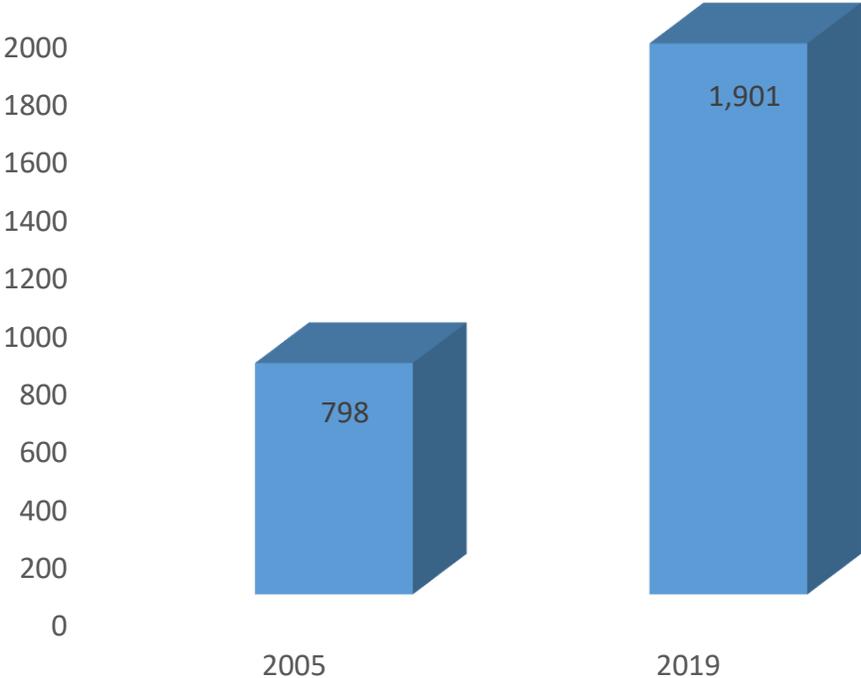


# Main Aviation Markets in the Region

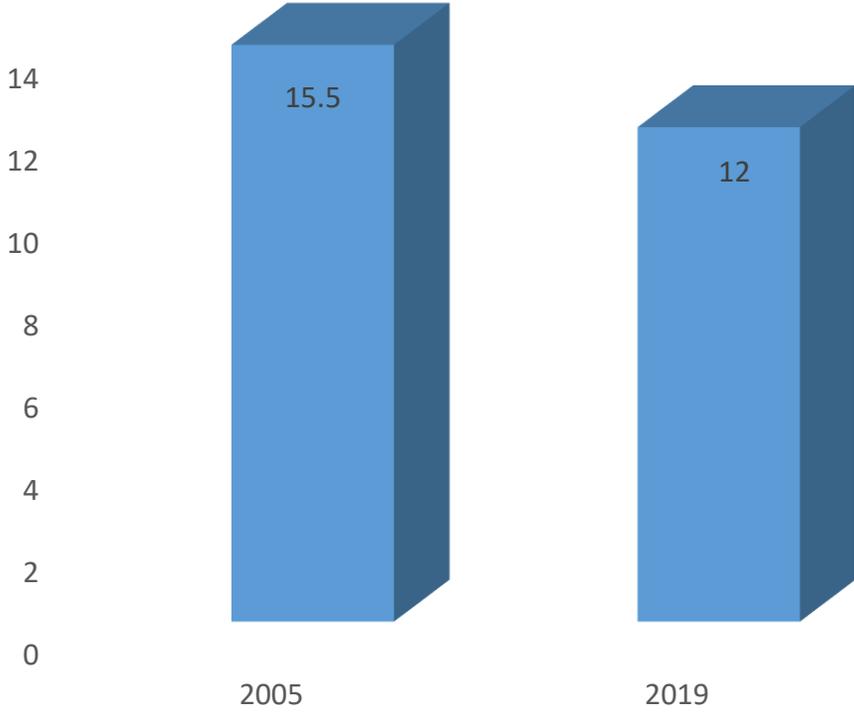
	Domestic % Growth	International % Growth	Total Pax Traffic 2018
	+3.3%	+10.1%	117.6 M
	+9.5%	+5%	96.4 M
	+3.9%	+9.4%	41.7 M
	+12.6%	+2.2%	29.2 M
	+8.3%	+8.6%	24.6 M
	+16%	+3.4%	24.5 M
	-7%	+6.1%	16.8 M

# Latin America and Caribbean Fleet Evolution

Fleet Count

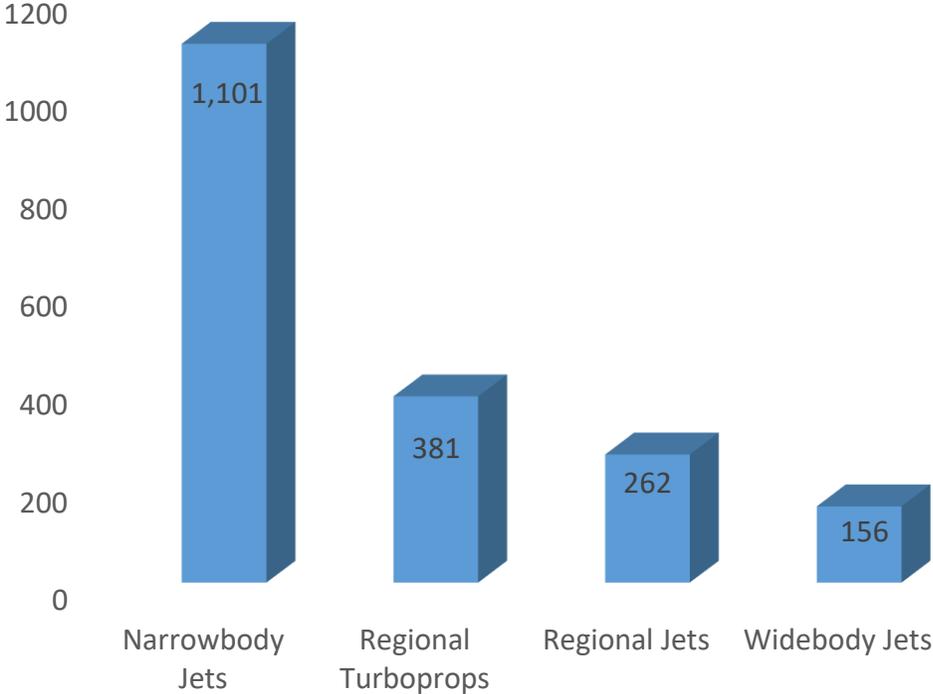


Average Age

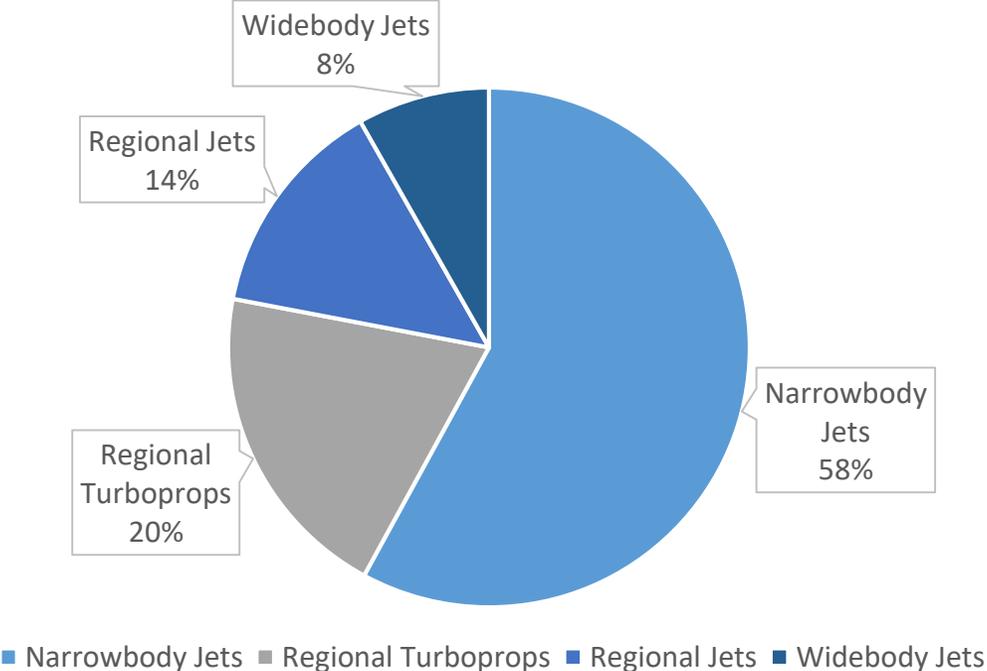


# Latin America Fleet by Market Class

Total Aircraft by Market Class

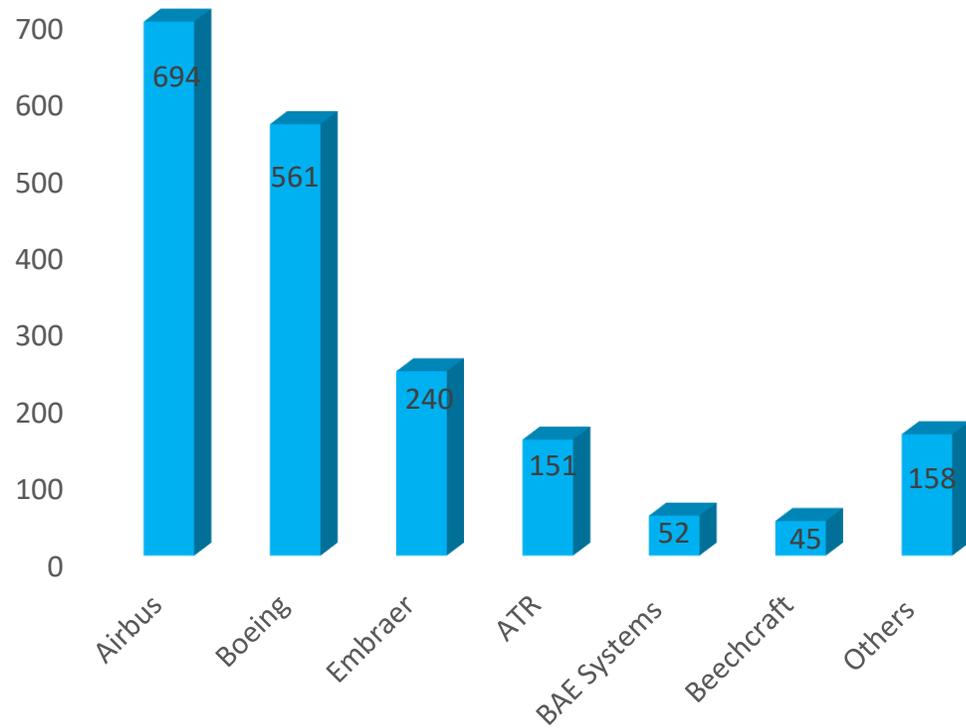


Discrimination by Market Class

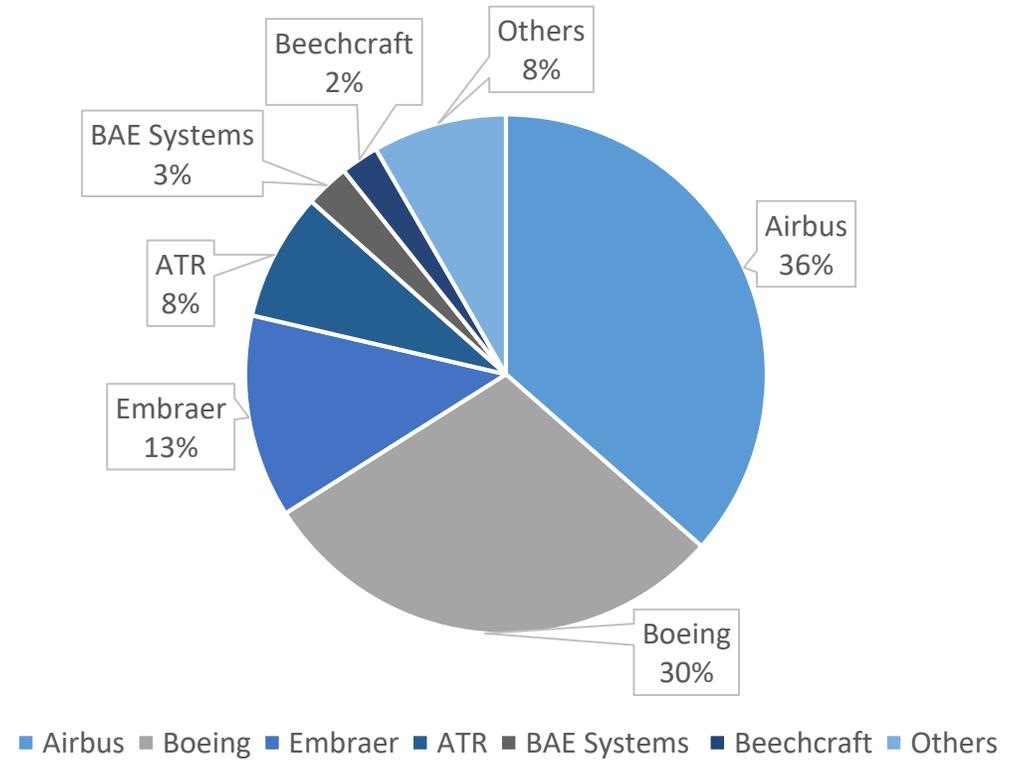


# Latin America Fleet by Manufacturer

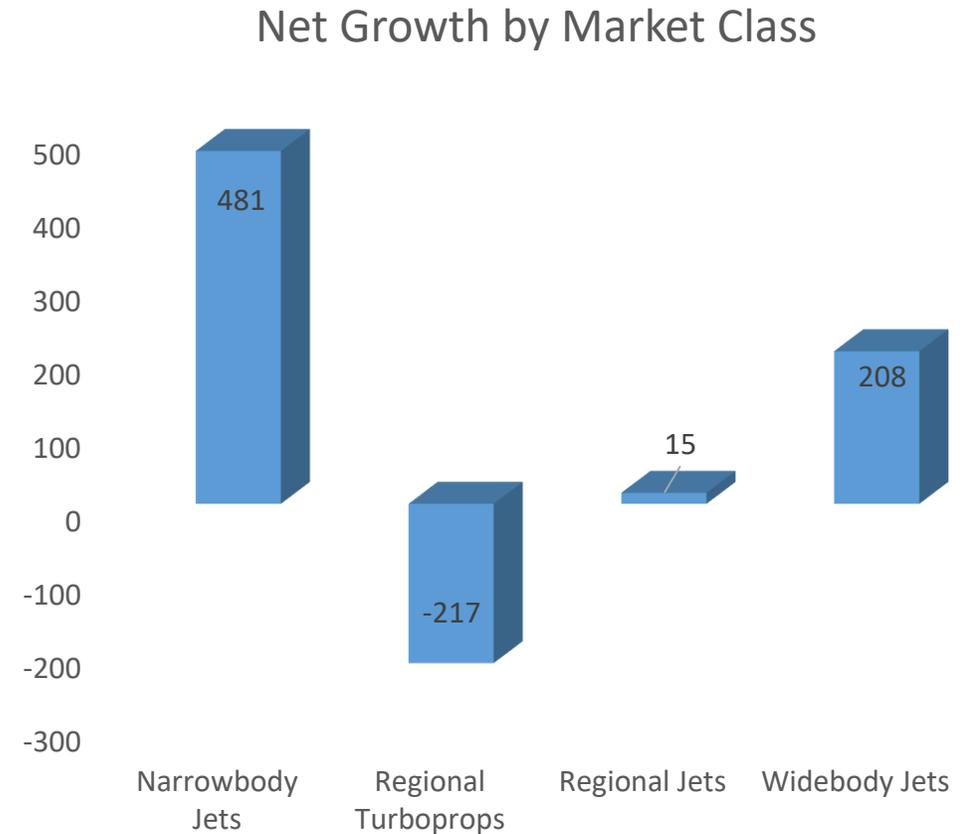
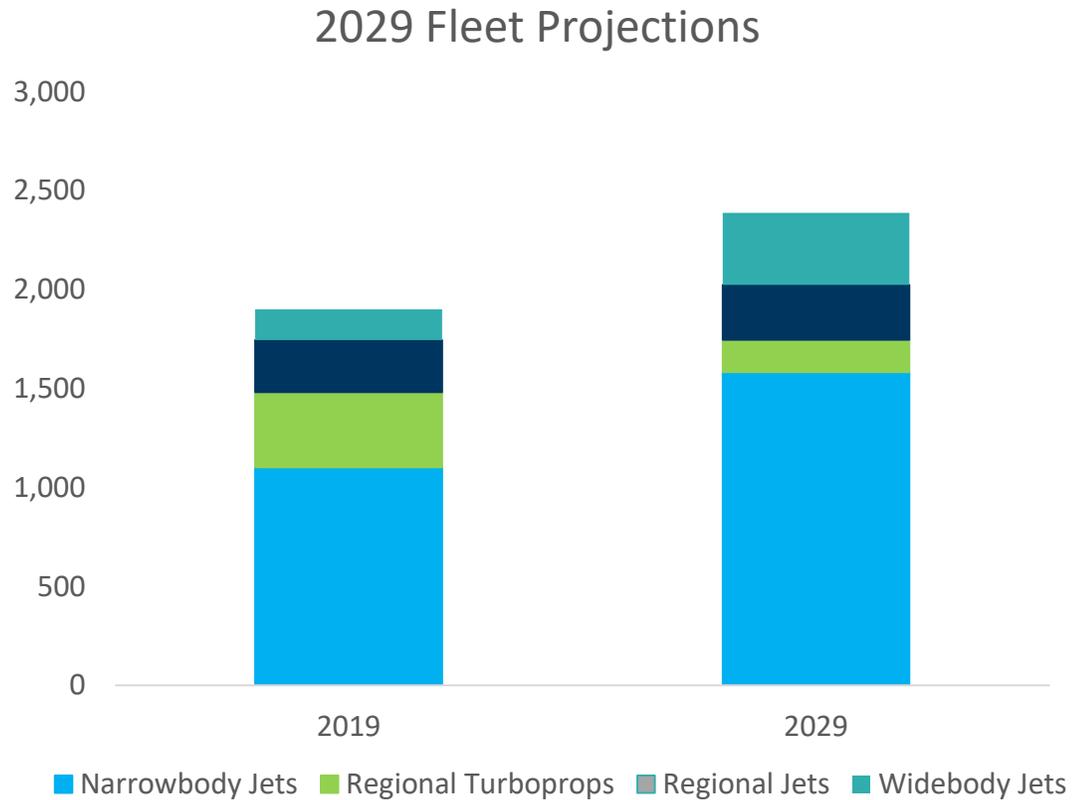
## Total Aircraft by Manufacturer



## Discrimination by Manufacturer



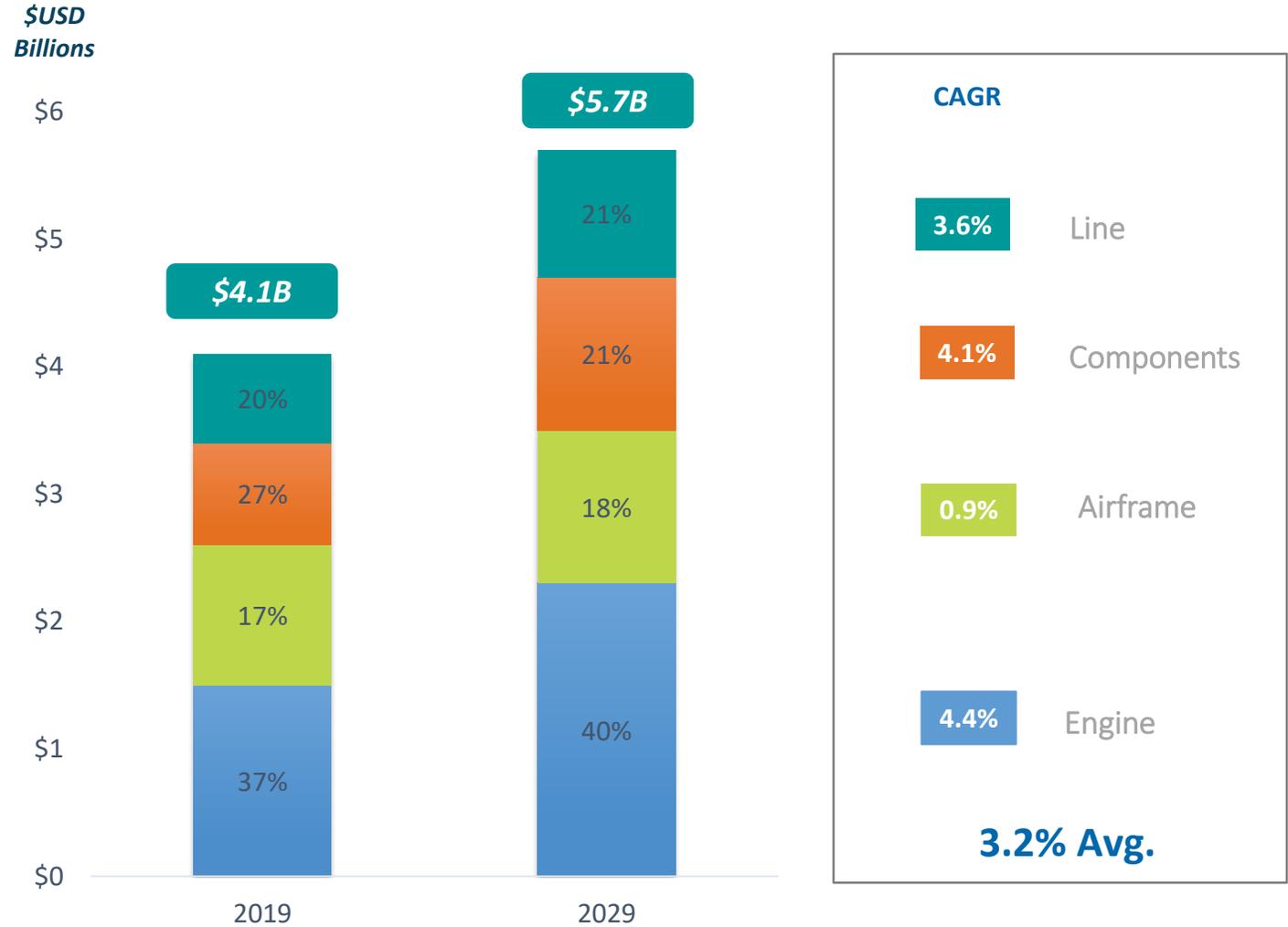
# Latin America Fleet Forecast: The combination of solid air travel demand and the need to replace maturing aircraft will drive fleet growth to an annual rate of 3%



# The Latin American MRO market is expected to grow to approx. \$5.7B by 2029, at 3.2% per year

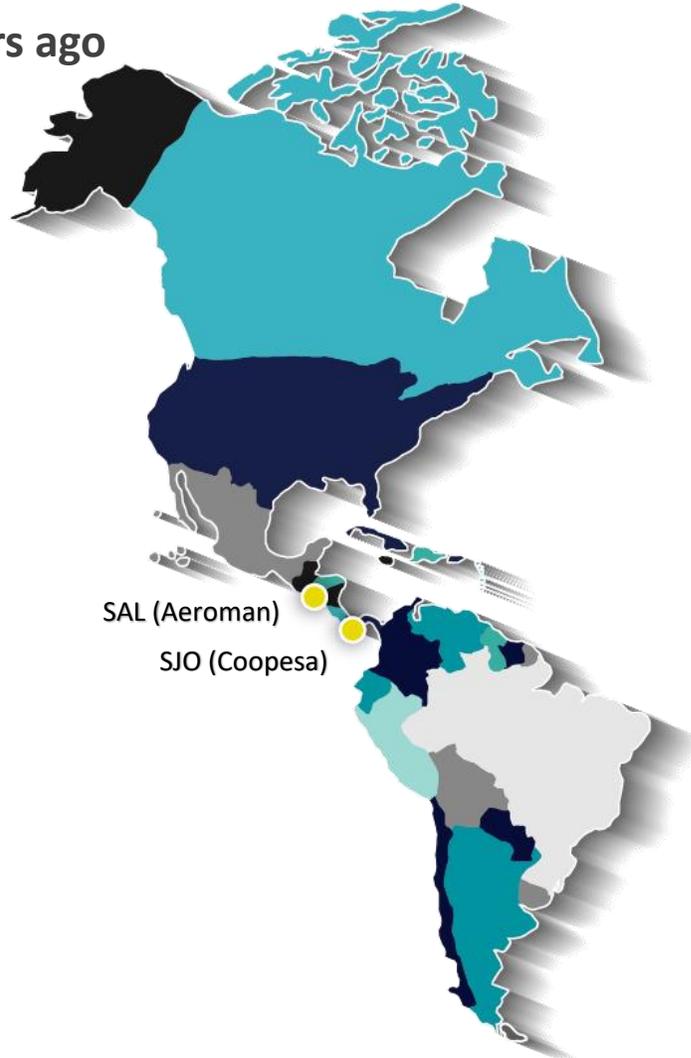
- Engines is the fastest growing MRO segment in Latin America
- MROs in Latin America continue to expand facilities; overall, region seeing further investment
- Lack of regional component maintenance is still a concern for carriers
- Some airline MROs are bringing work in-house, including engine CFM56-5B repair and widebody base maintenance.

## 10-Year Global Latin American MRO Demand Growth



# MROs in Latin America continue to expand facilities

20 years ago



Currently



## MRO Facilities

in Latin America and Caribbean

Source: ALTA

# Main Challenges and Opportunities in the Region

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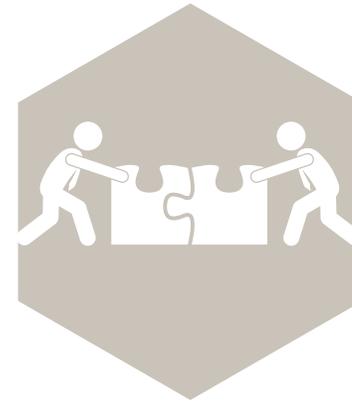
CUSTOMS  
BARRIERS



REGULATIONS  
(LARS)



MANDATORY  
AVIONICS  
MODIFICATIONS  
AND CONNECTIVITY



OEM  
CONSOLIDATION



HUMAN RESOURCES



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