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The Power of Flight

79th AGM and World Air Transport Summit
Istanbul, Türkiye 4 – 6 June 2023

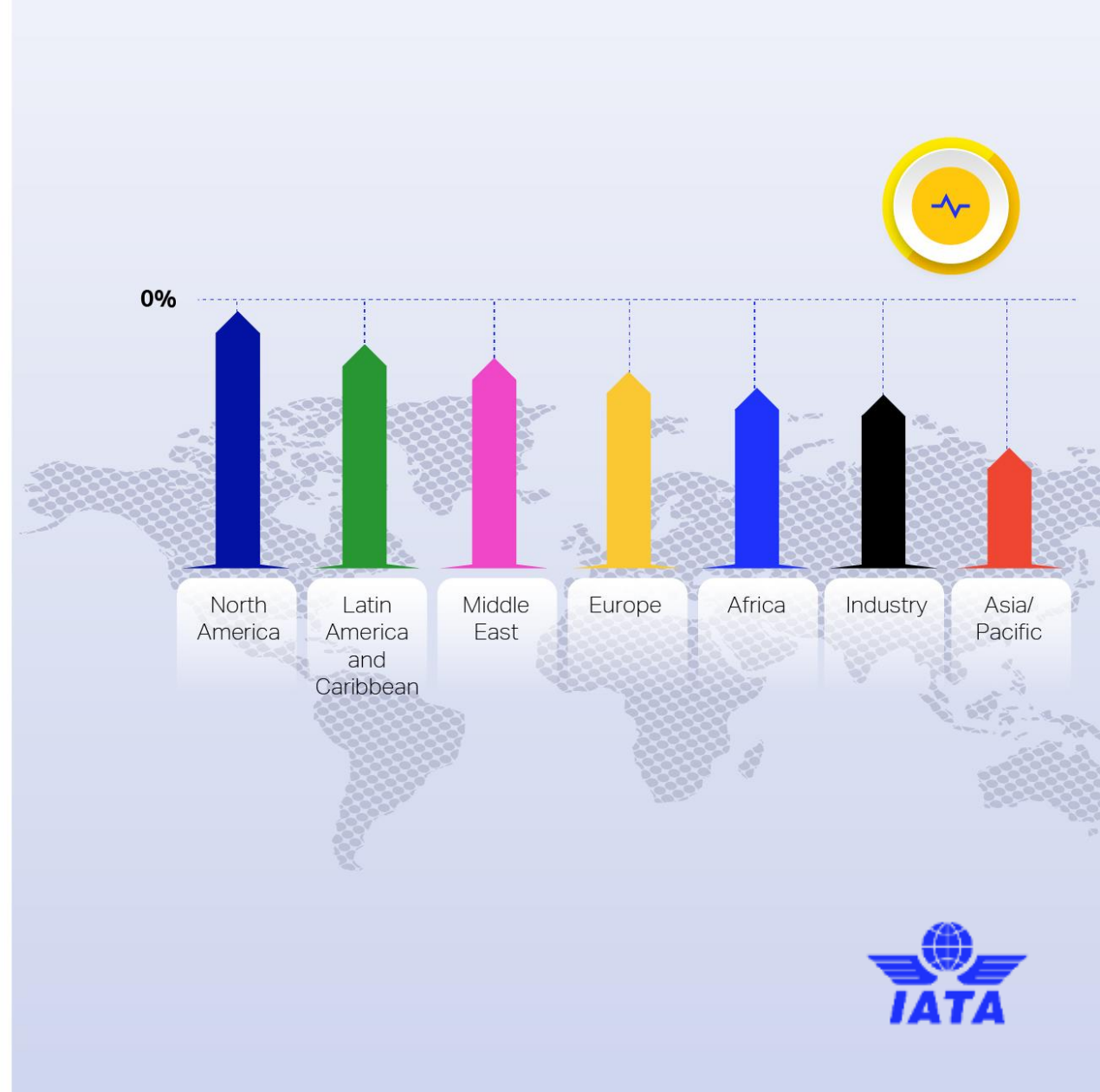
The Americas Regional Briefing

Peter Cerdá

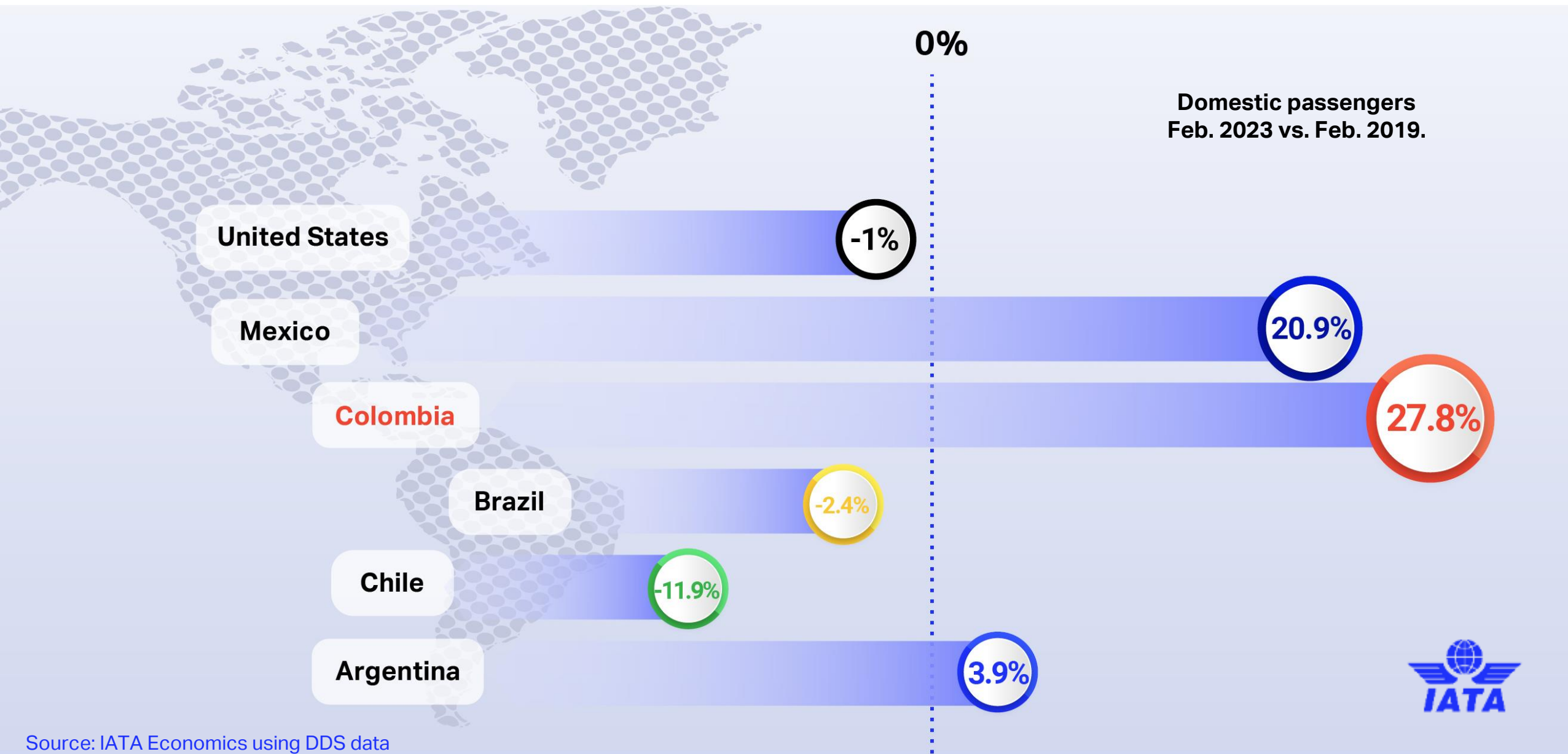
Regional Vice President - The Americas



Regional RPKs Recovery Mar. 2023

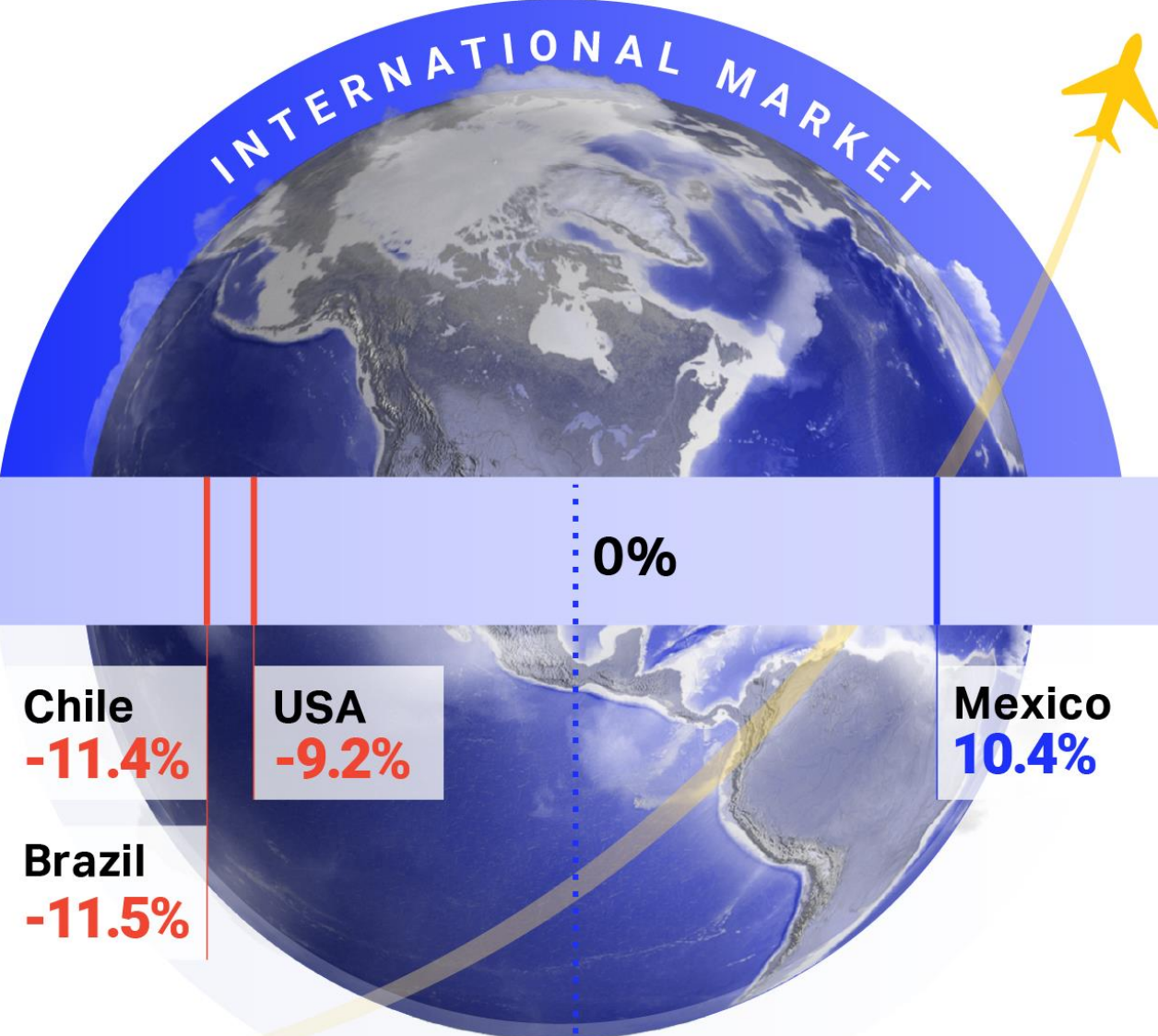


Colombia leads recovery of the domestic market



Colombia also leads recovery of the international market

International passengers
Feb. 2023 vs. Feb. 2019



Argentina
-21.6%

Chile
-11.4%

Brazil
-11.5%

USA
-9.2%

Mexico
10.4%

Colombia
18.8%

0%

Source: IATA Economics using DDS data



Key Challenges across the Americas



**Consumer
Protection**

**Taxes and
Fees**

Infrastructure

Sustainability

**Value of
Aviation**



Consumer Protection

- Concerning proposals in Canada and the United States.
- Over 20 projects of law related to consumer protection in Latin America.
- Critical to consider entire value chain and hold players causing the delay accountable, not simply assign airlines as the culprits.



Taxes & Fees

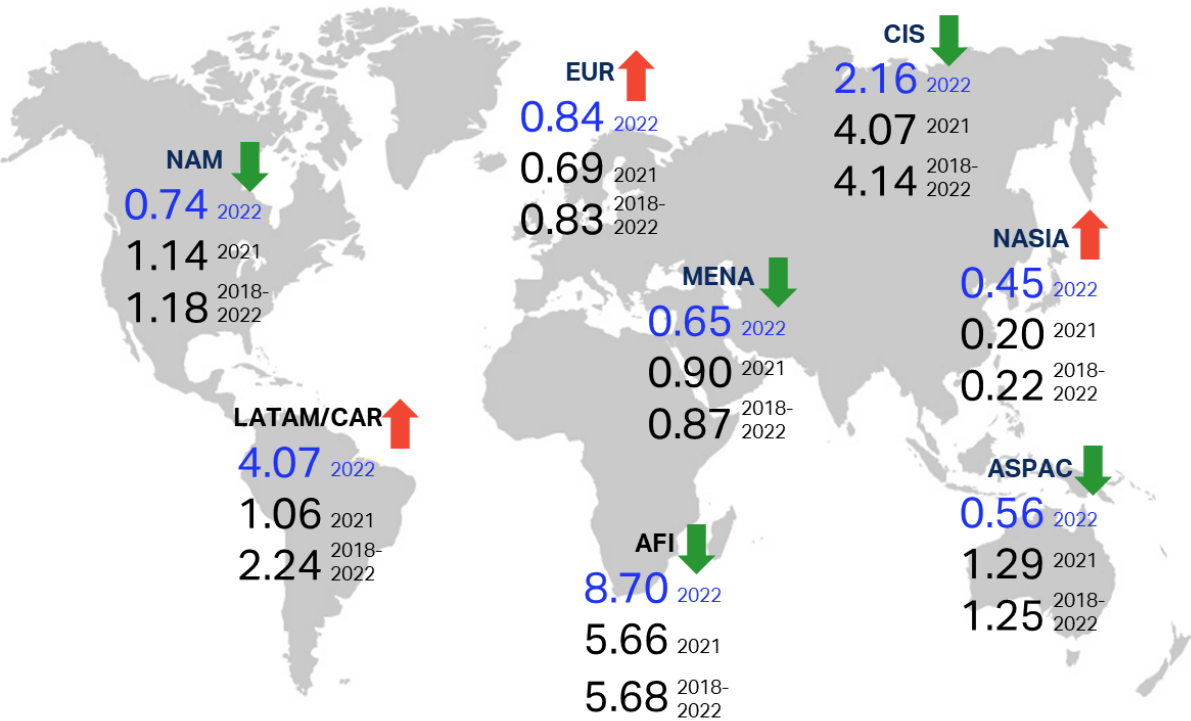
- Taxes and fees can easily make up 50% of the total ticket price.
 - Colombia re-imposed 19% level of VAT on airline tickets and jet fuel.
 - High taxes in Argentina and Mexico.
- Some countries view aviation as partners and lower taxes to increase country's competitiveness:
 - Ecuador: Reduction of tourism taxes
 - Barbados: Reduction of airport service charge for intra-regional travel
- Increase in ANSP fees:
 - NAV CANADA
 - Bahamas





Infrastructure

- Significant investments made at key US airports:
 - New York (LGA, JFK) and LAX
 - But airlines are asked to reduce capacity due to ATC and CBP staffing shortages.
- Long-term solutions needed to avoid capacity crunch at key airports.
 - Bogota
 - Buenos Aires (AEP/EZE)
 - Lima
 - Mexico City (MEX/NLU)
 - Sao Paulo (GRU)

All Accident Rate per Region of Operator



	Industry	IATA Members	
2022	1.21	0.49	  2022 vs 2021 accident rate
2021	1.13	0.61	
2018-2022 (Avg)	1.26	0.76	

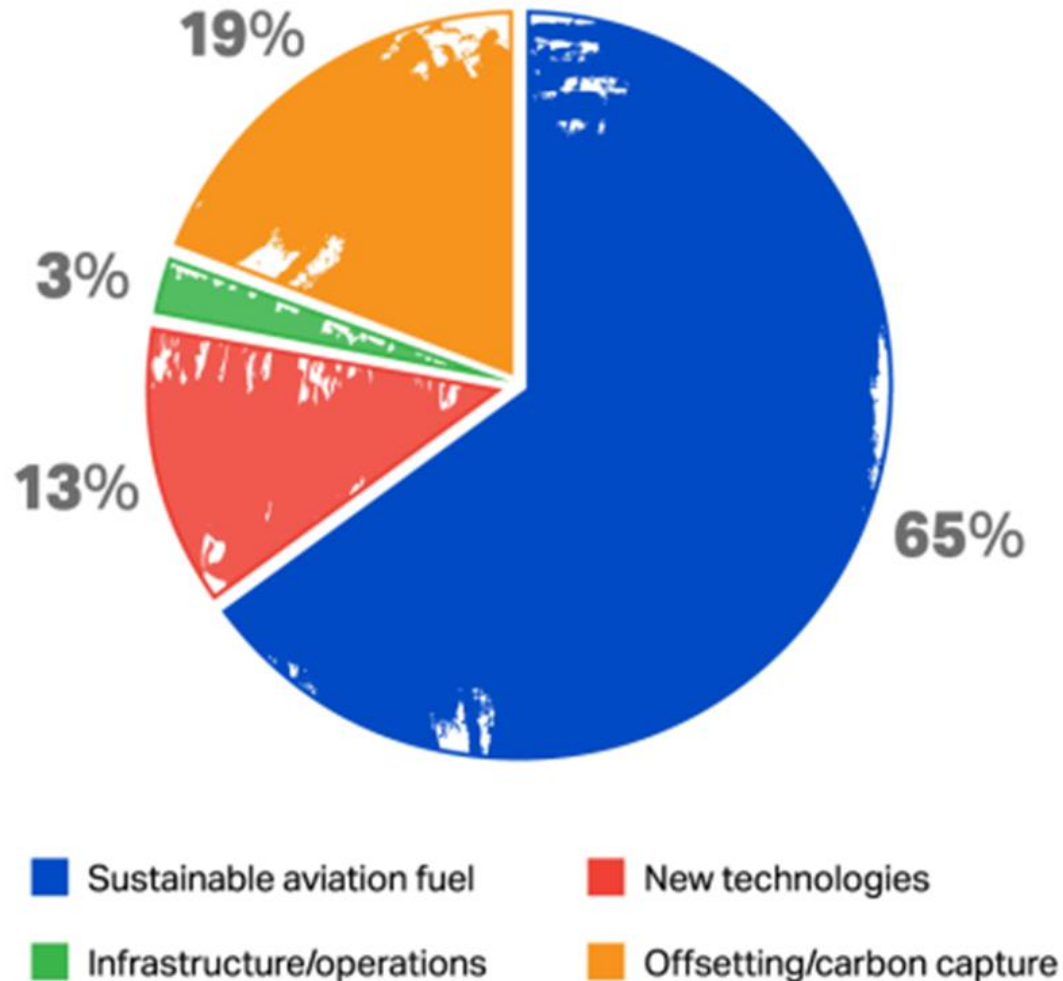
Safety

- Remains industry's # 1 priority.
- 130,000 flights take off and land without incident daily
- But we must not become complacent
- IATA is helping provide tools to enable state regulators and operators to support the adoption of safety best practices.



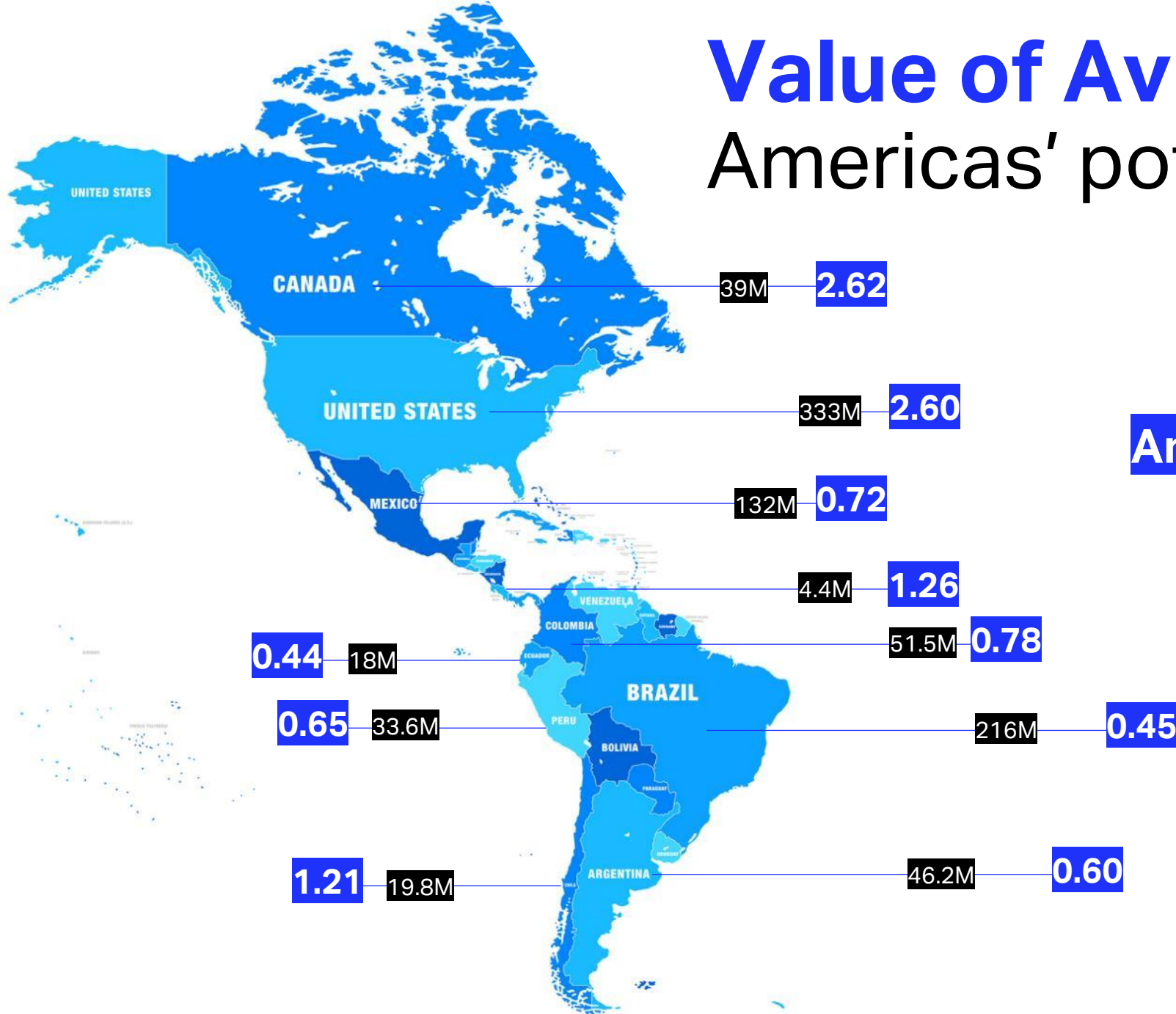
Sustainability

Contribution to achieving Net Zero Carbon in 2050



- Americas region has the potential to become one of the biggest SAF producers.
- Governments need to urgently facilitate and incentivize energy transformation process.
- Operational efficiency opportunities available today.

Value of Aviation: Americas' potential to grow



Annual Trips per Capita
Total Population

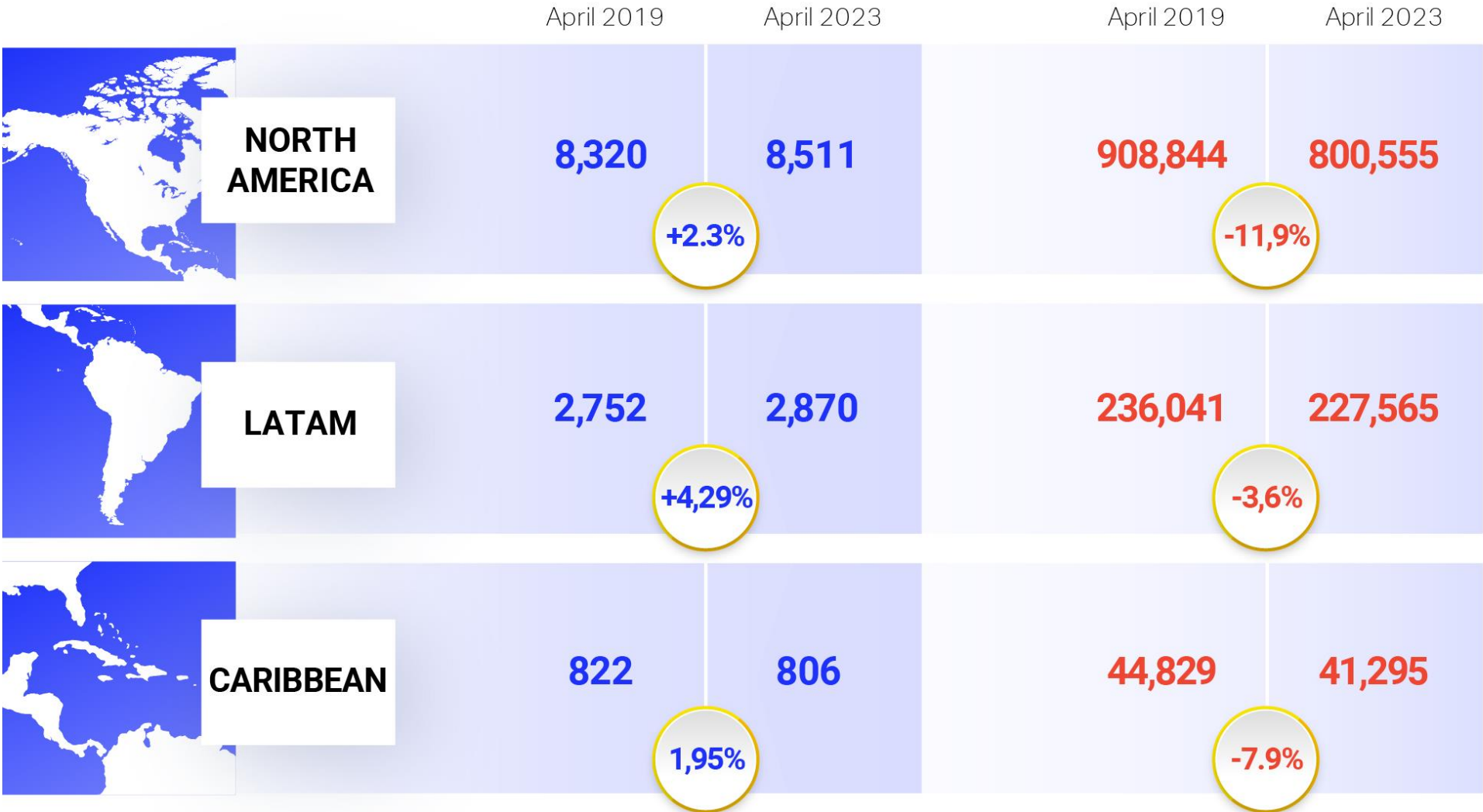


Collaboration between governments and industry key to region's socio-economic recovery.

Connectivity is slowing returning

ROUTES

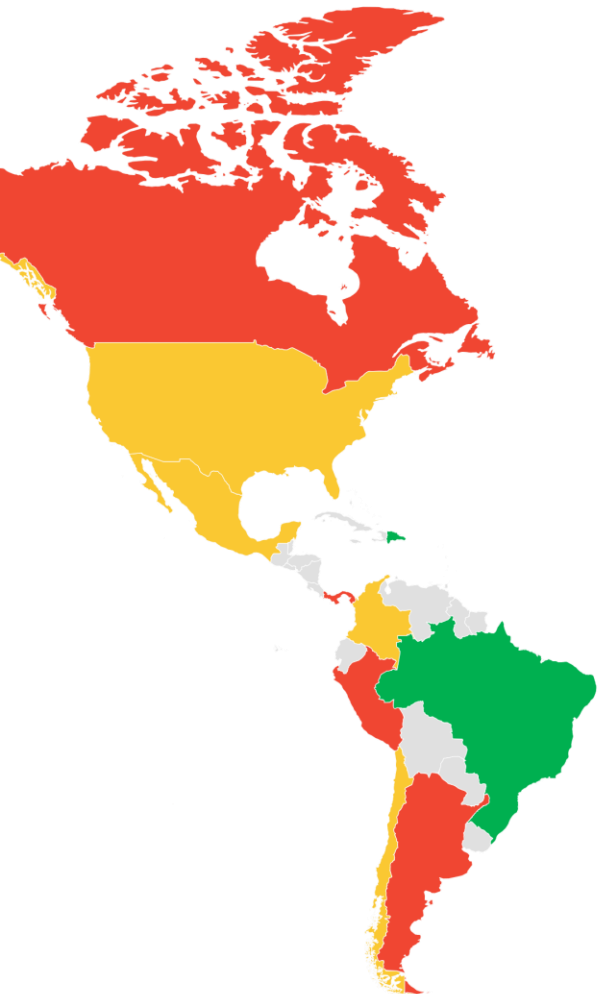
FREQUENCIES



Source: IATA Economics using DDS data








Recovery patterns in key markets across the region



 ROUTES

 FREQUENCIES






April 2019 April 2023

Country	April 2019	April 2023	Change (%)	April 2019	April 2023	Change (%)
	1,358	1,127	-17	95,524	74,166	-22.4
	6,959	7,381	+6	813,285	726,359	-10.7
	725	683	-5.8	55,332	54,418	-1.7
	113	119	+5.3	4,065	4,865	+19.7
	109	99	-9.1	6,567	5,692	-13.3

 ROUTES

 FREQUENCIES

April 2019 April 2023 April 2019 April 2023

Country	April 2019	April 2023	Change (%)	April 2019	April 2023	Change (%)
	262	303	+15.6	27,704	26,417	-4.6%
	683	851	+24.6	69,182	70,994	+2.6
	101	89	-11.8	13,871	10,757	-22.4
	107	112	+4.6	10,270	9,912	-3.5
	227	206	-9.2	14,620	13,449	-8

