



Global Market Forecast

Latin America & the Caribbean

2019-2038

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AIRBUS



01

**Airbus in Latin
America &
Caribbean**

02

**Airbus Global
Market Forecast
for Latin
America &
Caribbean**

2000

2018

Airlines

90

73

Aircraft in operation

800

1487

Avg fleet age (yrs)

16.1

10.8

Aircraft in backlog

150

1008

RPK (billions)*

175

368

Regional evolution

Aircraft in operation increased by **86%**

x6 increase in the backlog

RPKs by **110%**

End December 2018
Source: Fleet Analyzer, OAG, SABRE

*From 2017/08 – 2018/07



Airbus presence

722 aircraft in service

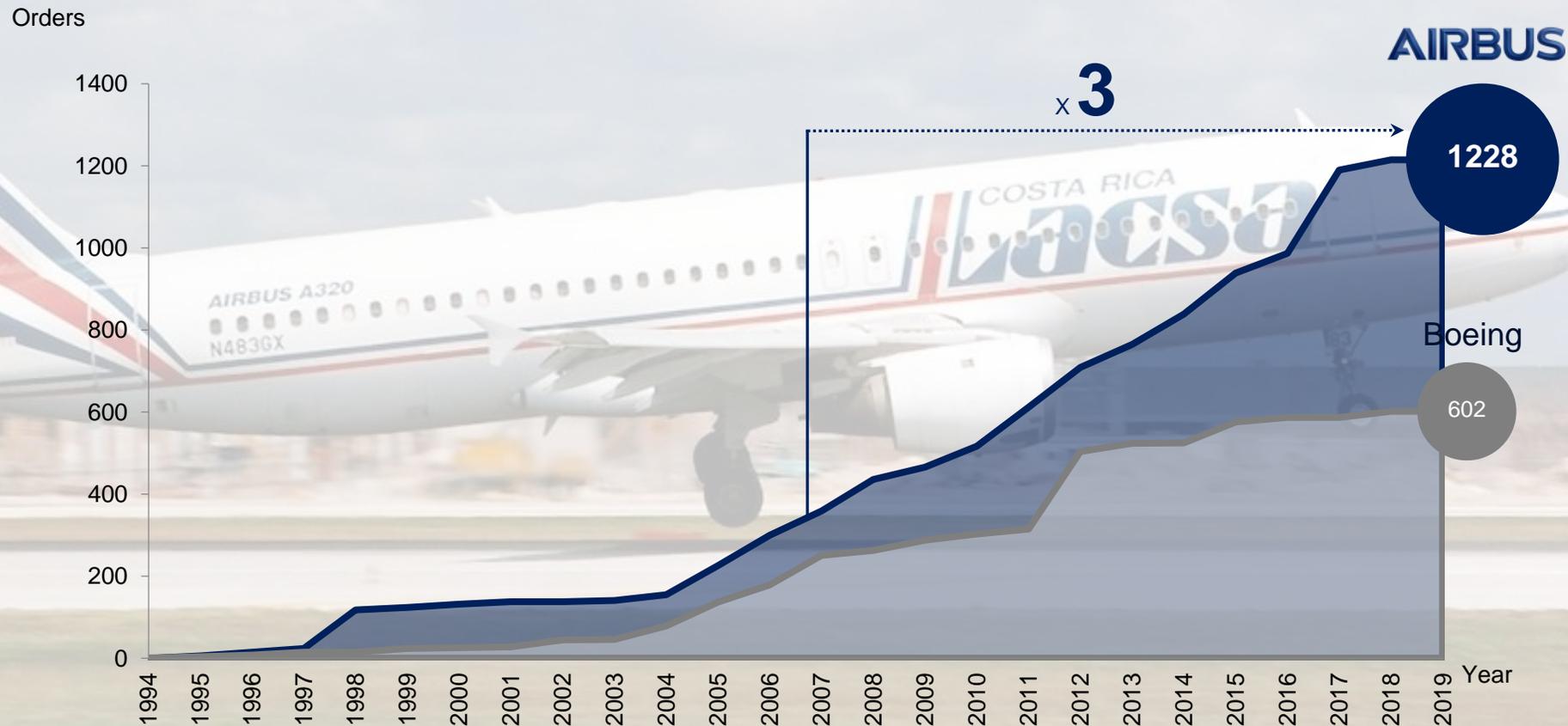
623 to be delivered

17 operators

End October 2019
Source: Airbus internal
Pax & Freighter a/c

Leased a/c included

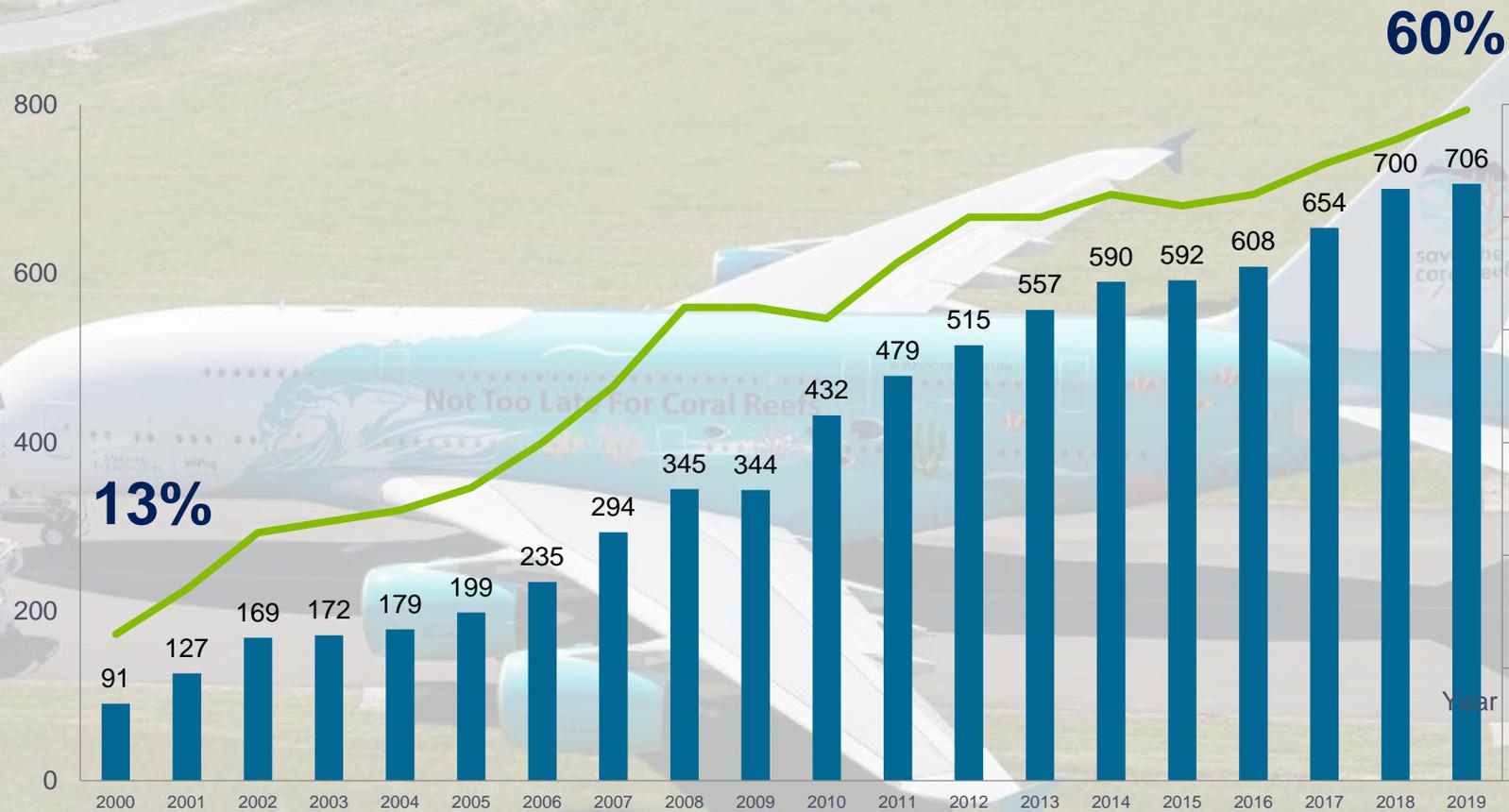
25 years of cumulative orders



Airbus has secured **67%** of net orders since 1994

End October 2019
Source: Airbus internal, Boeing

Aircraft in service



Airbus fleet in- service

623 to be
delivered

24 customers and
operators

End October 2019
Only pax a/c
Source: Airbus internal, Ascend

The undisputed aircraft of choice for Latin America



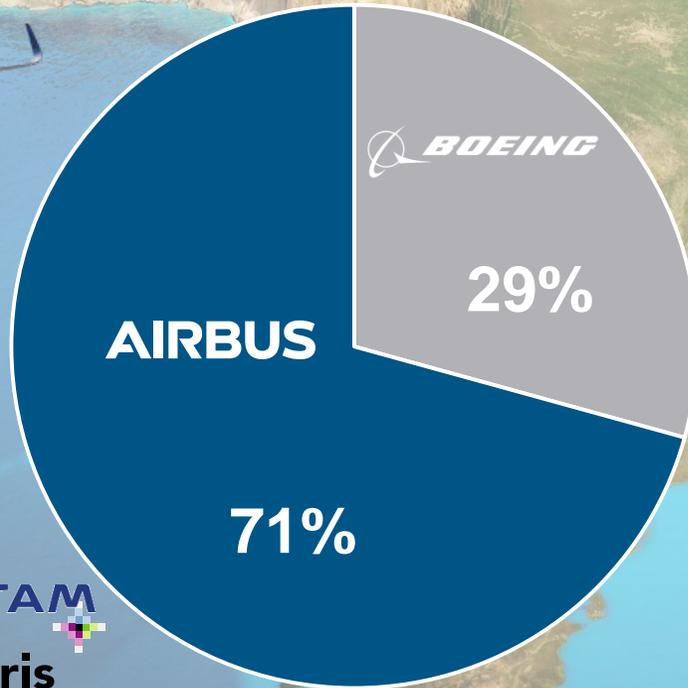
A320neo

11
Customers



MAX

6
Customers



A320neo

leads MAX

71% Orders

Market Share



End October 2019
Source: Airbus, Boeing
Leased a/c included

AIRBUS



Avianca

9 x A320neo CFM
2 x A321neo CFM



Azul

32 x A320neo CFM



Interjet

6 x A320neo CFM
8 x A321neo CFM



JetSmart

1 x A320neo PW



LATAM

11 x A320neo PW



Sky Airlines

12 x A320neo PW



VivaAerobus

16 x A320neo PW



Volaris

16 x A320neo PW
6 x A321neo PW

The neo is flying in Latin America

119 A320neo Family aircraft delivered

End October 2019
Source: Airbus
Leased a/c included

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Airbus Order Backlog

A320	1	Viva AIR
A320neo	428	Avianca Azul interjet JetSMART LATAM SYNERGY GROUP Viva AIR viva aerobus volaris
A321neo	163	Avianca Azul JetSMART LATAM viva aerobus volaris
A330neo	3	Azul
A350XWB	27	LATAM SYNERGY GROUP AIRCARAIBES



End October 2019
Source: Airbus
Leased a/c included
Passenger a/c



01

**Airbus in Latin
America &
Caribbean**



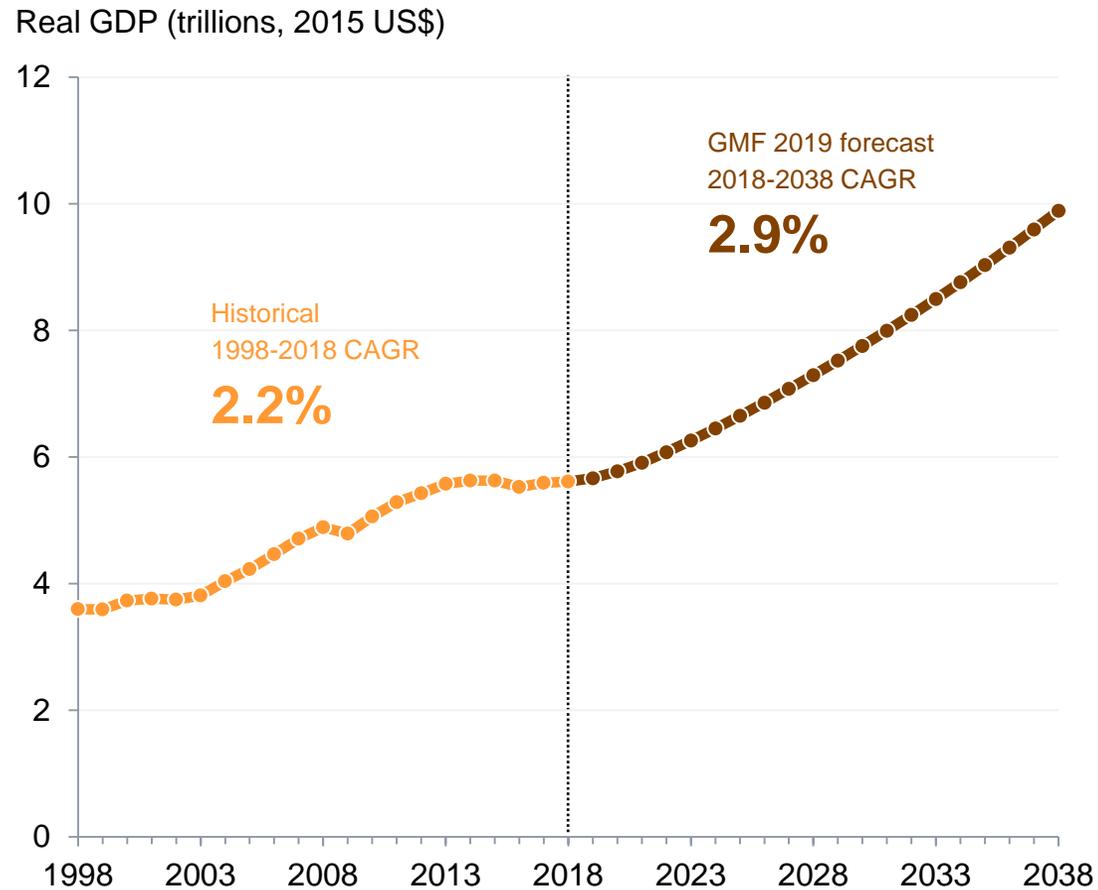
02

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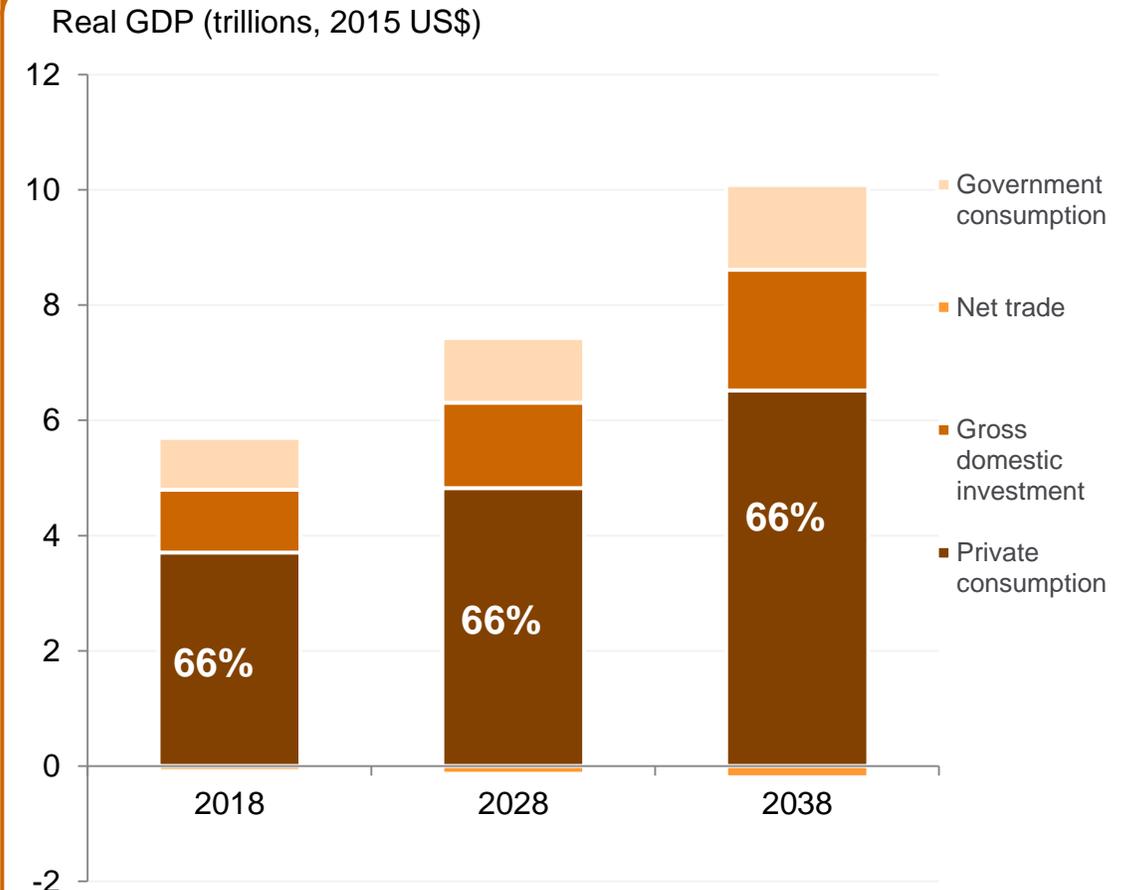


Latin America & the Caribbean economy expected to get back to growth

Economic growth will accelerate

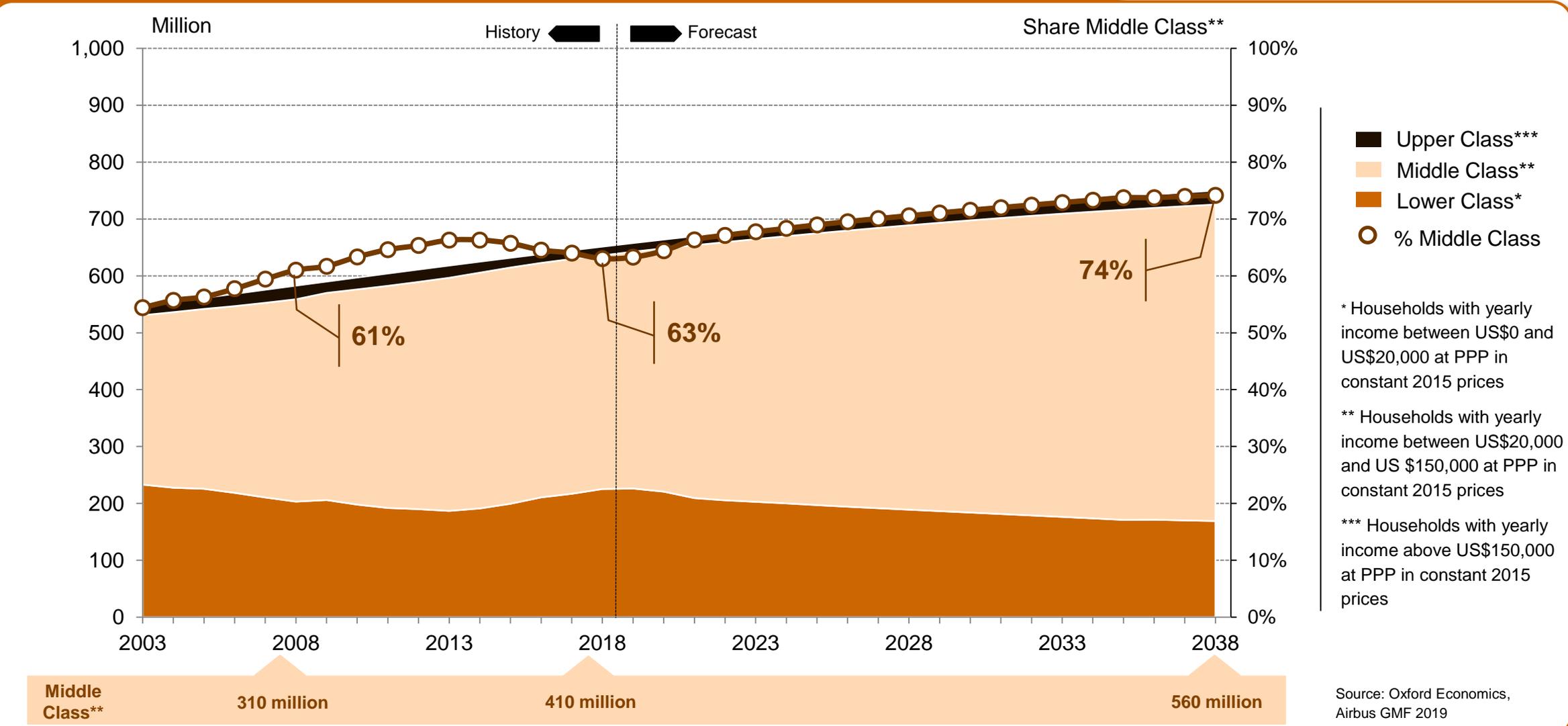


Economy mainly driven by private consumption

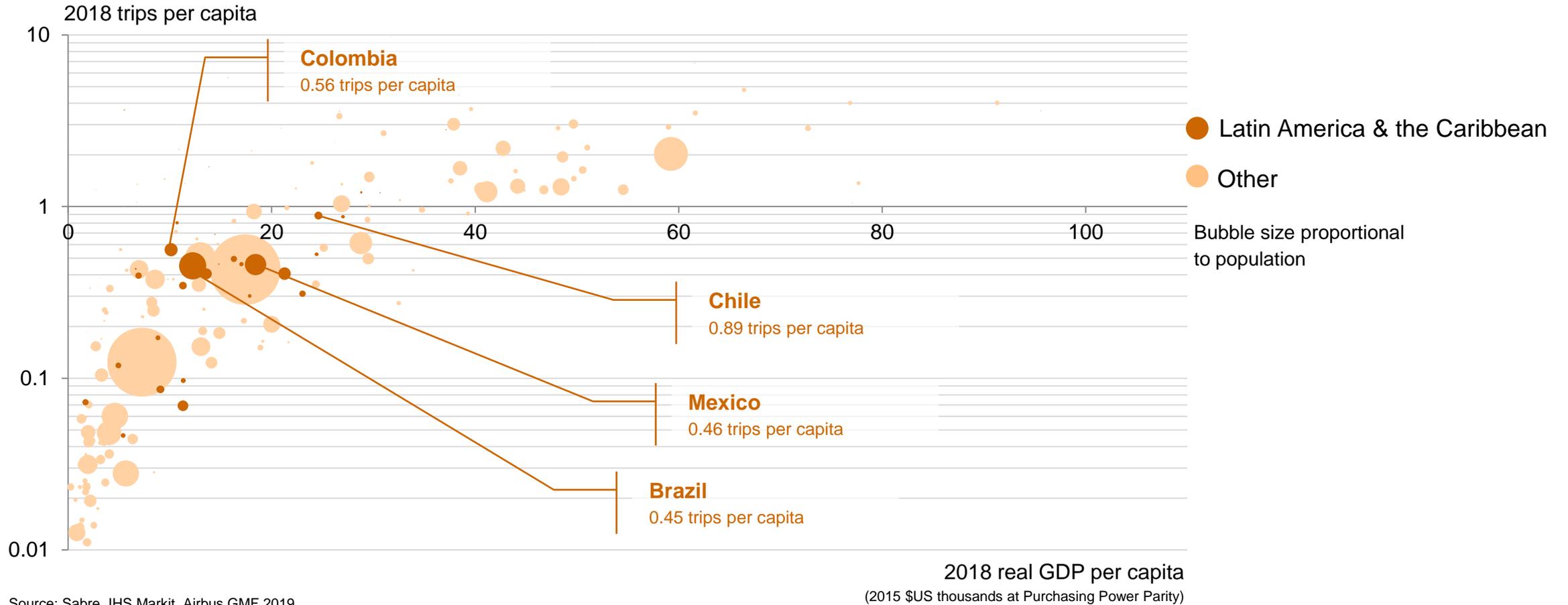


Middle class expected to grow from 410m people today, to 560m by 2038

Latin America & the Caribbean Middle Class** expected to represent 74% of the population by 2038



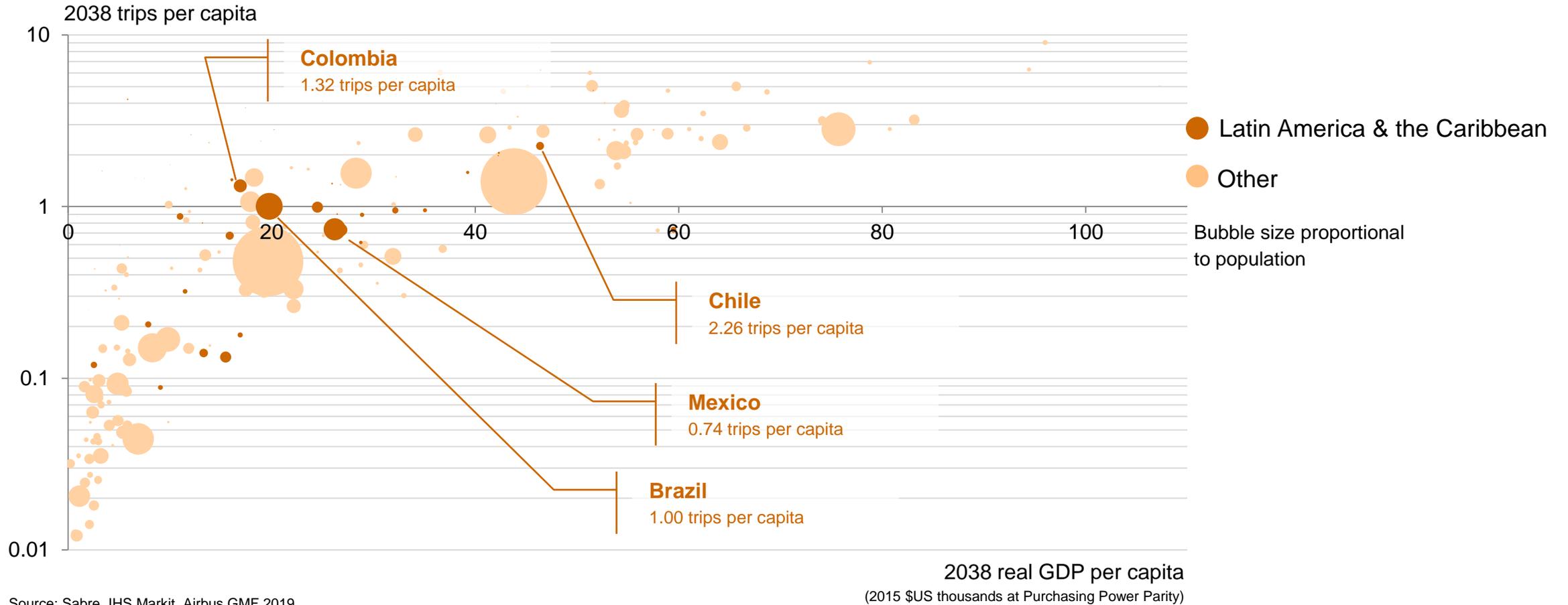
In 2018, there were ~0.43 trips per capita for Latin American & the Caribbean countries



Source: Sabre, IHS Markit, Airbus GMF 2019
Equivalent amount of passengers flying from/to/within the country

2018 real GDP per capita
(2015 \$US thousands at Purchasing Power Parity)

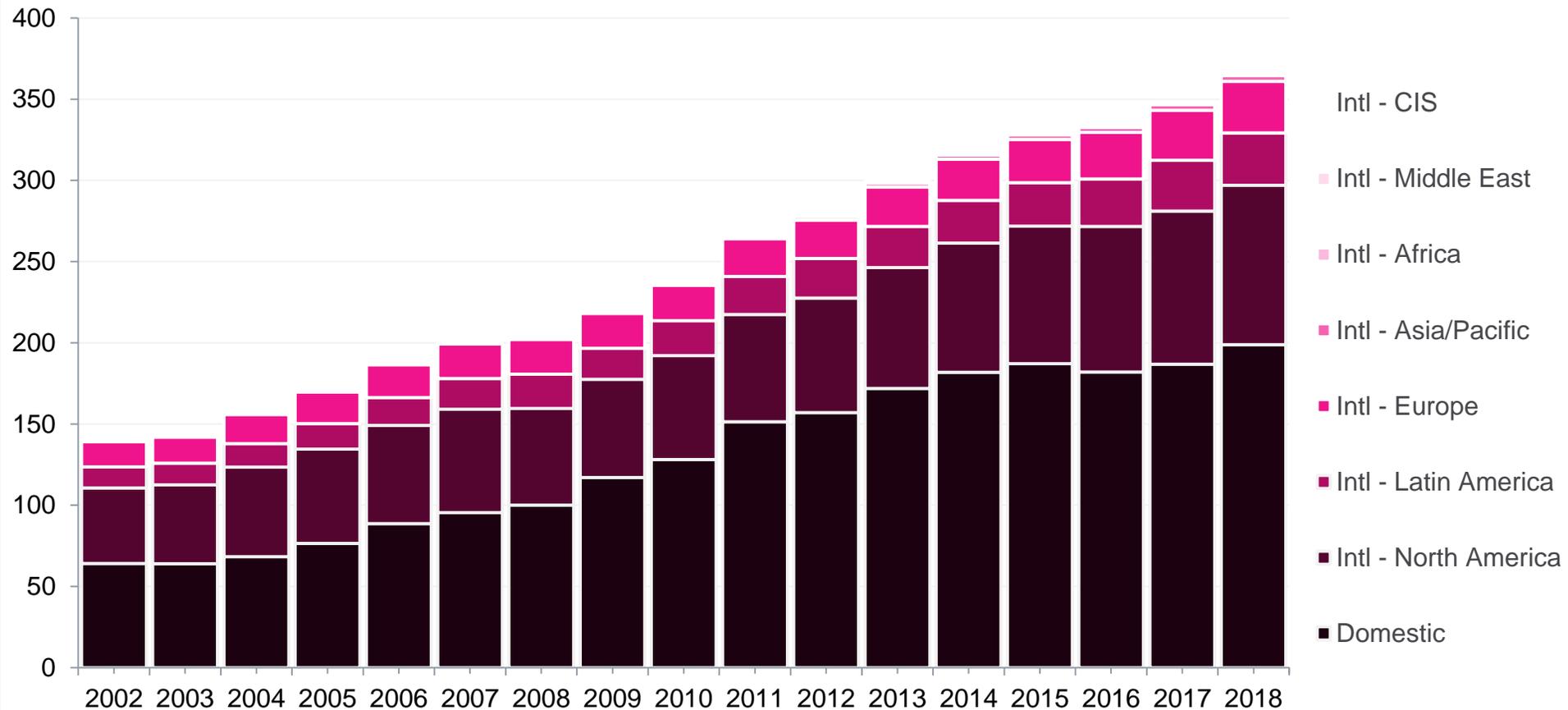
By 2038, Latin America & the Caribbean trips per capita will double (~0.86)



Traffic from/to/within Latin American & the Caribbean countries has been multiplied by 2.6 since 2002

O&D traffic has grown by 6.2% per year since 2002

O&D passengers per year, from/to/within Latin America & the Caribbean (millions)



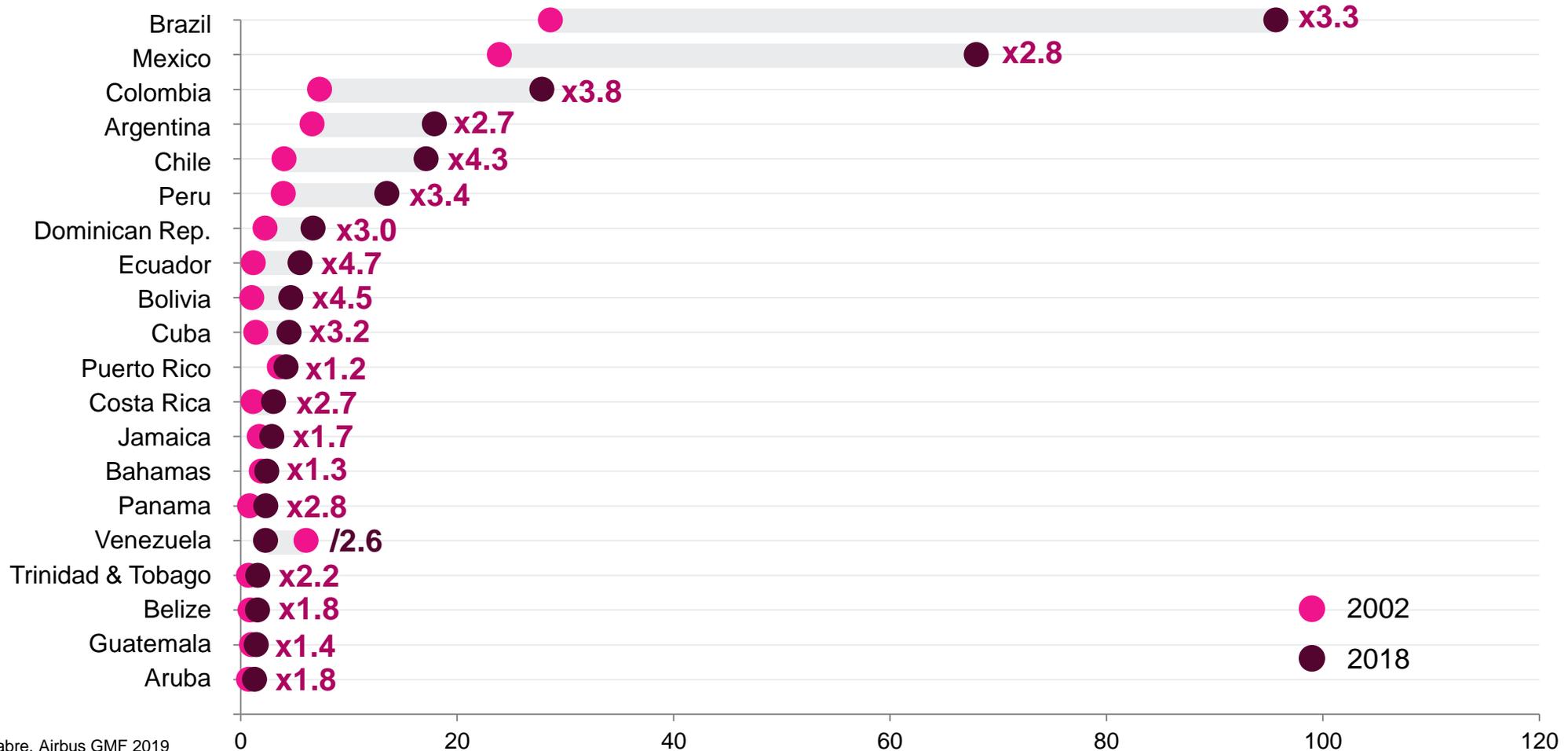
2018 vs. 2002
x10.2
x7.2
x3.2
x4.0
x2.0
x2.5
x2.1
x3.1

Source: Sabre, Airbus GMF 2019

Brazil, Mexico and Colombia leading Latin America and the Caribbean passenger traffic growth

71% of the additional traffic generated since 2002 is from Brazil, Mexico and Colombia

Top 20 O&D passengers by origin Latin America & the Caribbean countries (millions)

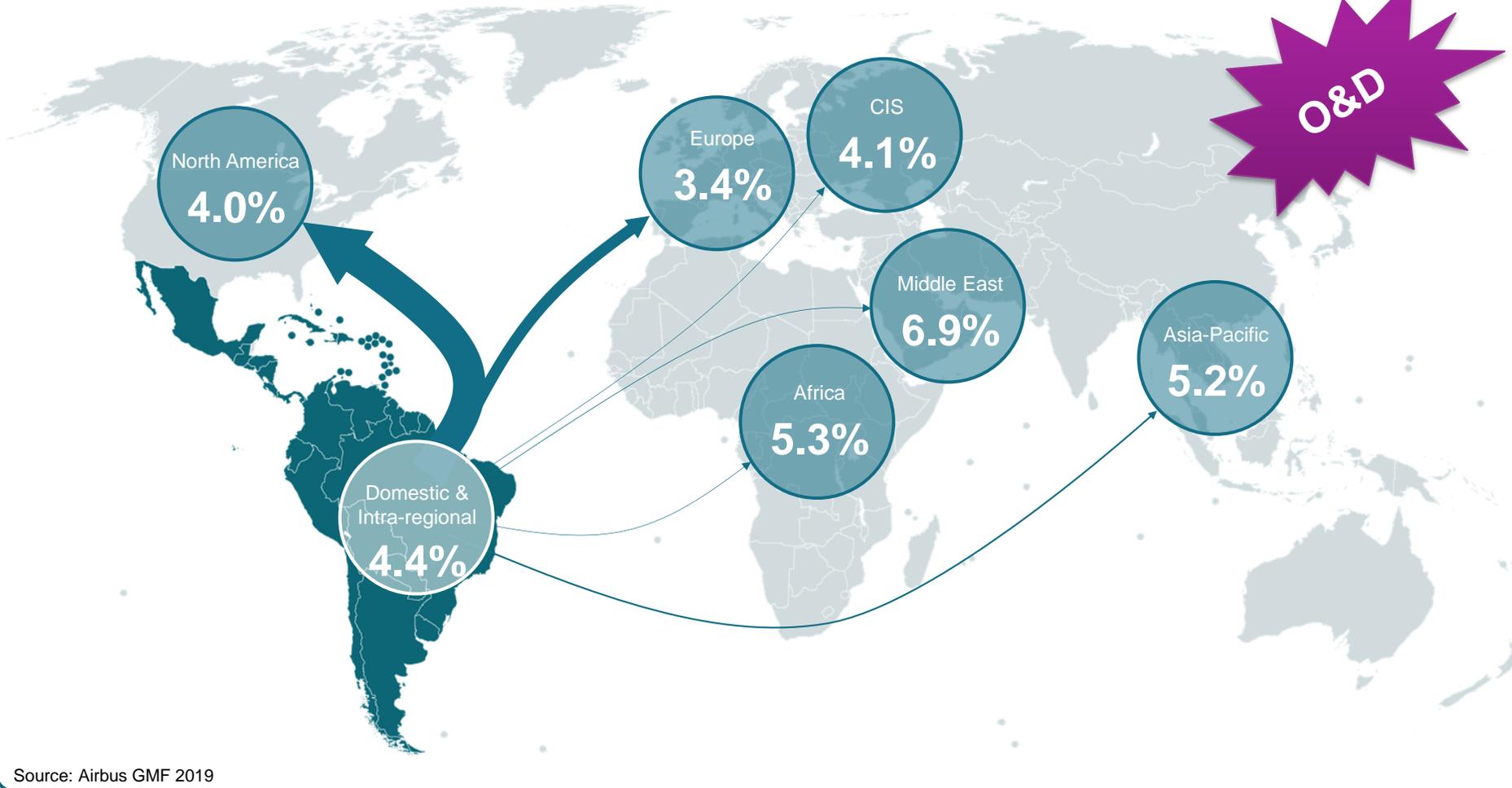


Source: Sabre, Airbus GMF 2019

Latin America & the Caribbean O&D traffic expected to grow strongly over the next 20 years

O&D traffic from/to/within Latin America & the Caribbean forecast to grow at 4.2% per year

O&D traffic forecast – 2018-2038 CAGR



Domestic & Intra-regional
Latin America & the
Caribbean
4.4%

Latin America & the
Caribbean - Rest of World
3.9%

Total
4.2%

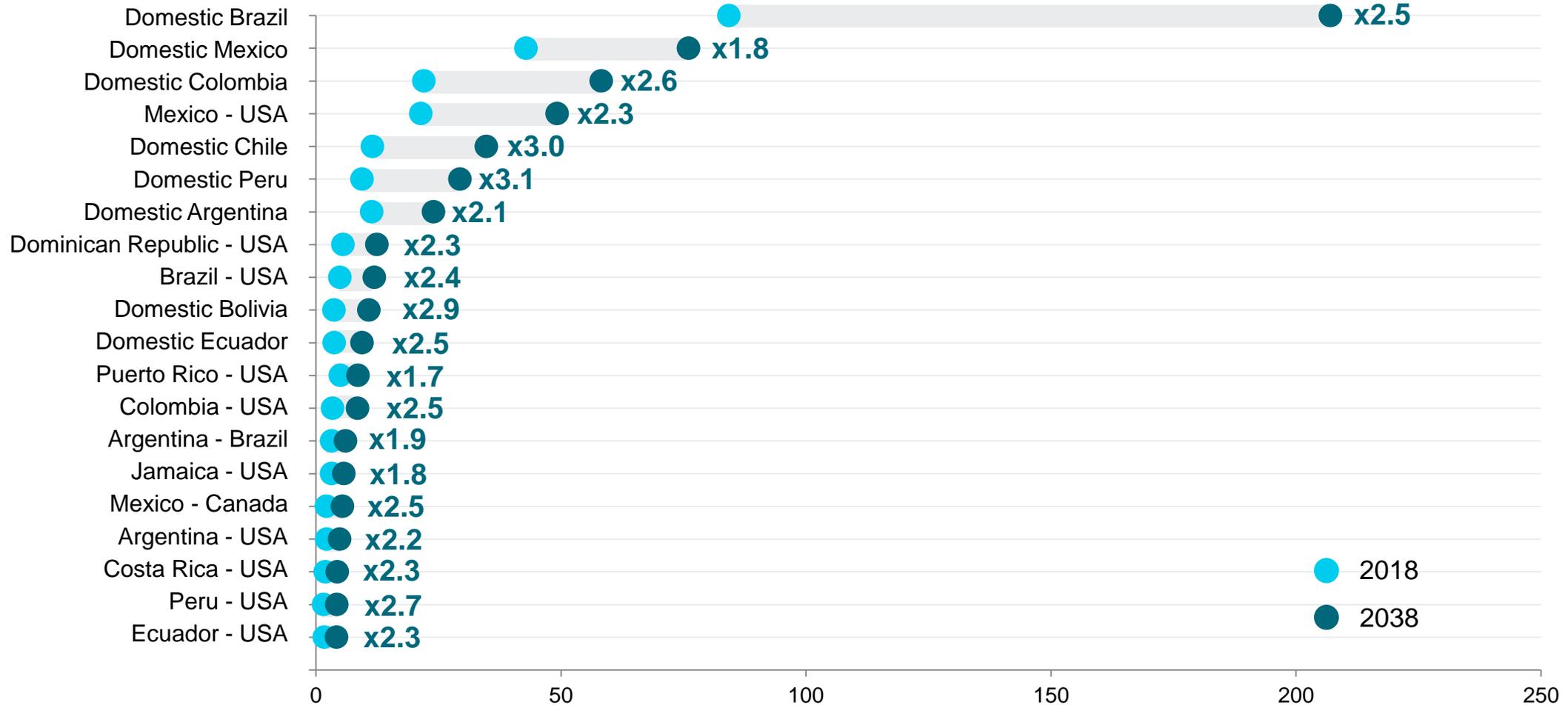
Source: Airbus GMF 2019

| Traffic forecast

By 2038, 62% of additional traffic driven by Domestic markets

Traffic from/to/within Latin America & the Caribbean forecast to multiply by 2.3 by 2038

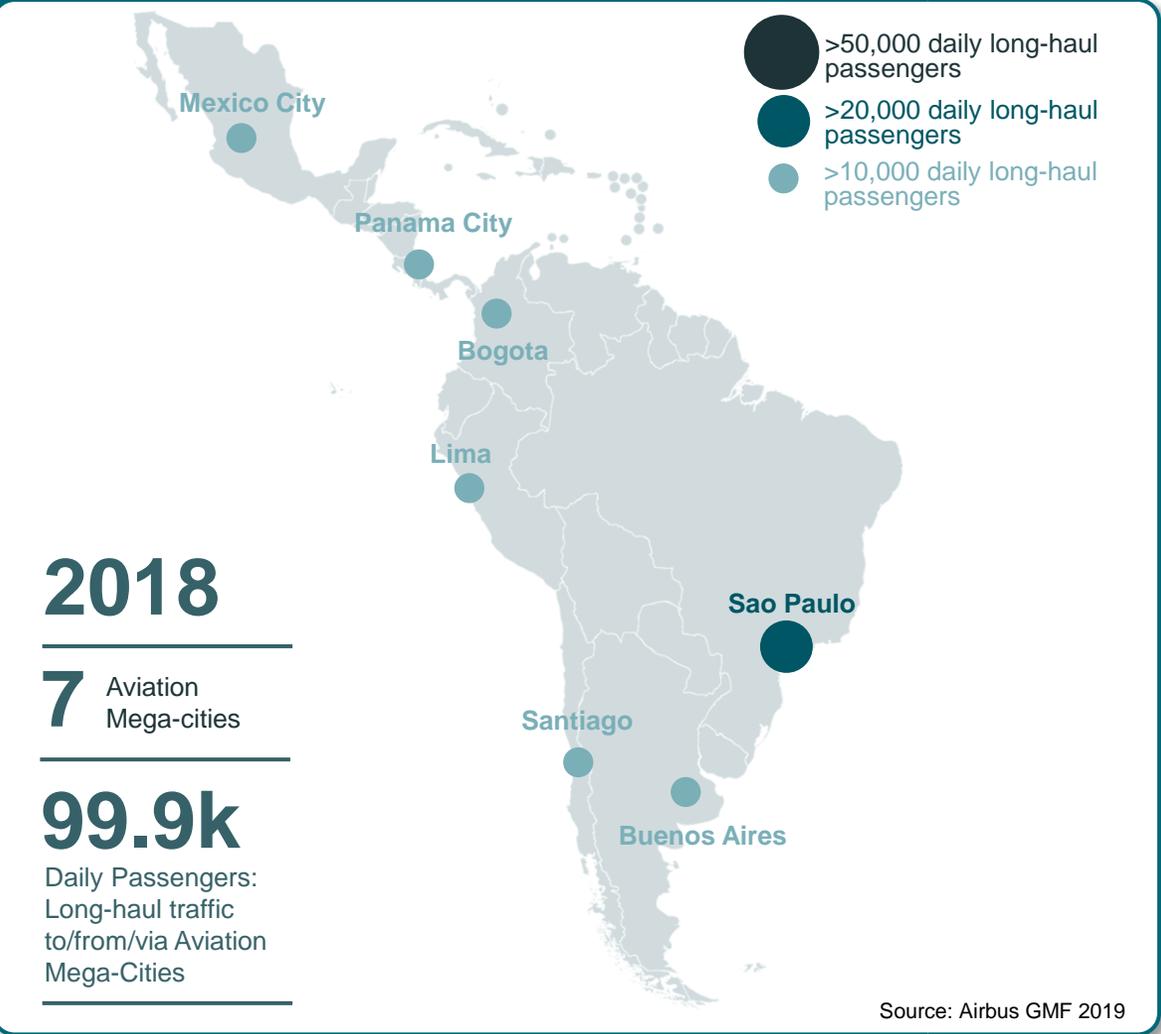
O&D passengers on TOP20 country-pairs from/to/within Latin America & the Caribbean (millions)



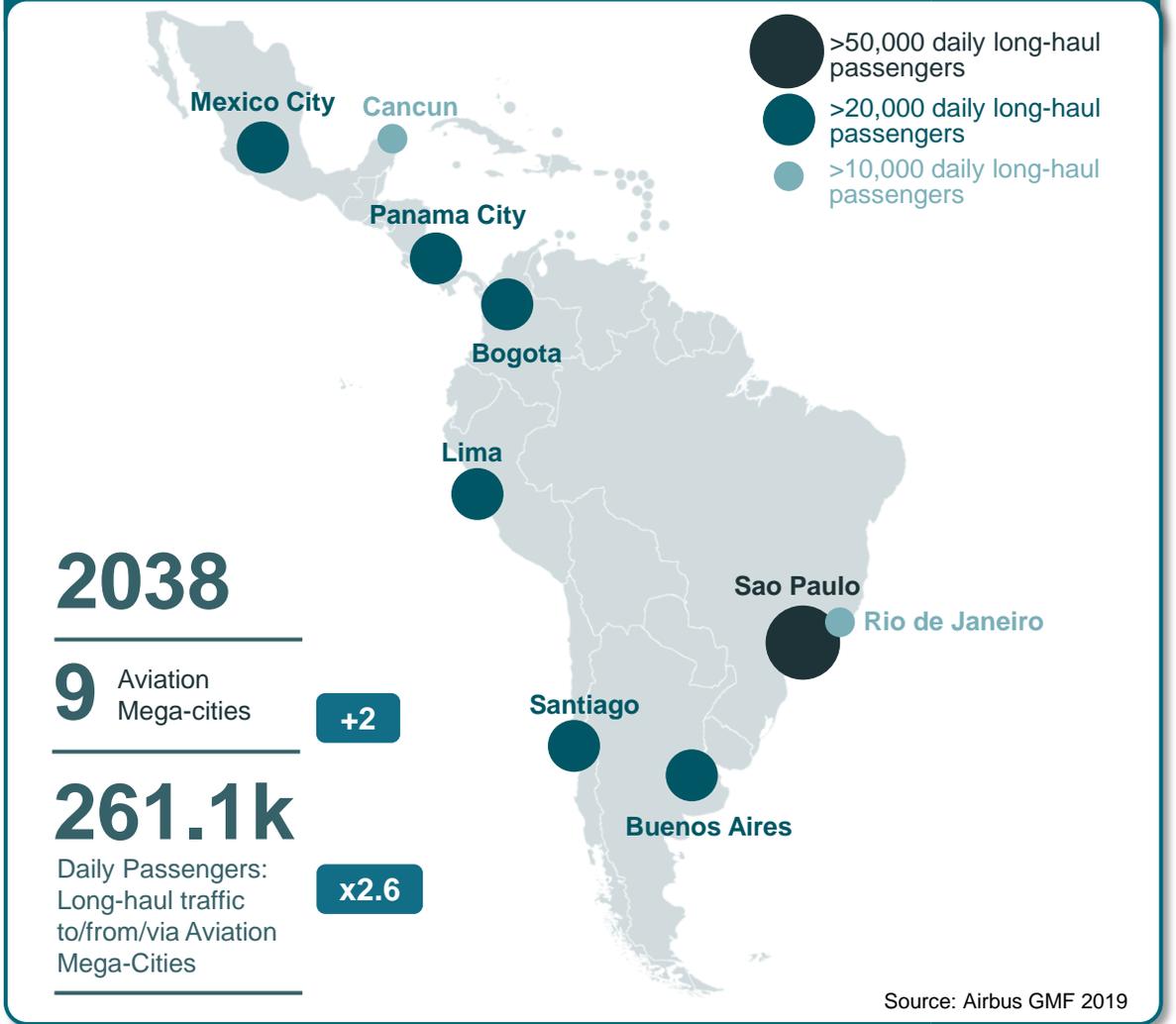
Source: Airbus GMF 2019

O&D traffic growth will boost Aviation Mega-Cities in the region

In 2018, Latin America & the Caribbean had 7 Aviation Mega-Cities

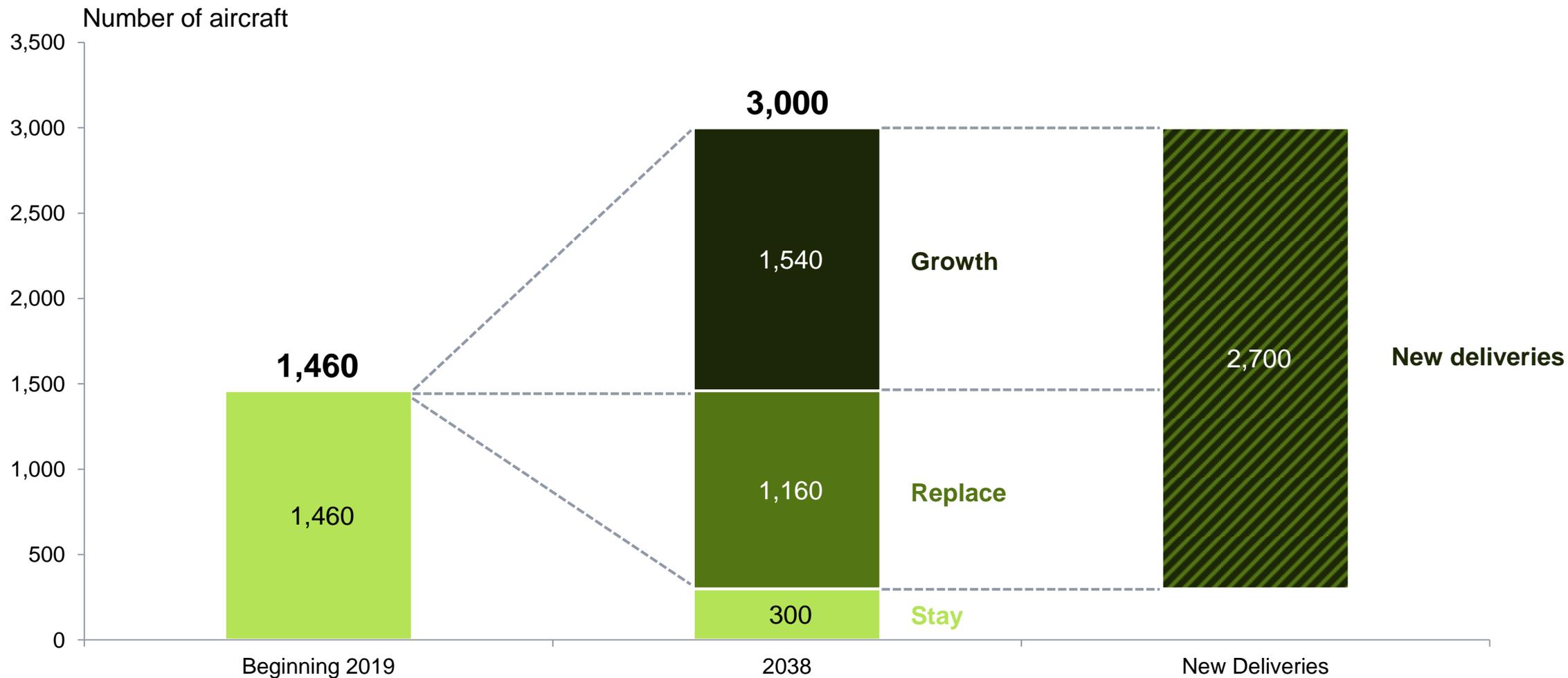


In 2038, Latin America & the Caribbean home to 9 Aviation Mega-Cities



Demand for some 2,700 new aircraft in Latin America & the Caribbean

Aircraft demand is split between growth (57%) and replacement (43%)



Notes: Passenger aircraft (≥ 100 seats) | Jet freight aircraft (>10 tons) | Figures rounded to nearest 10
Source: Airbus GMF 2019

Demand for some 2,700 new aircraft in Latin America & the Caribbean

SMALL

2,400 aircraft

89% share of total new del.

MEDIUM

200 aircraft

7% share of total new del.

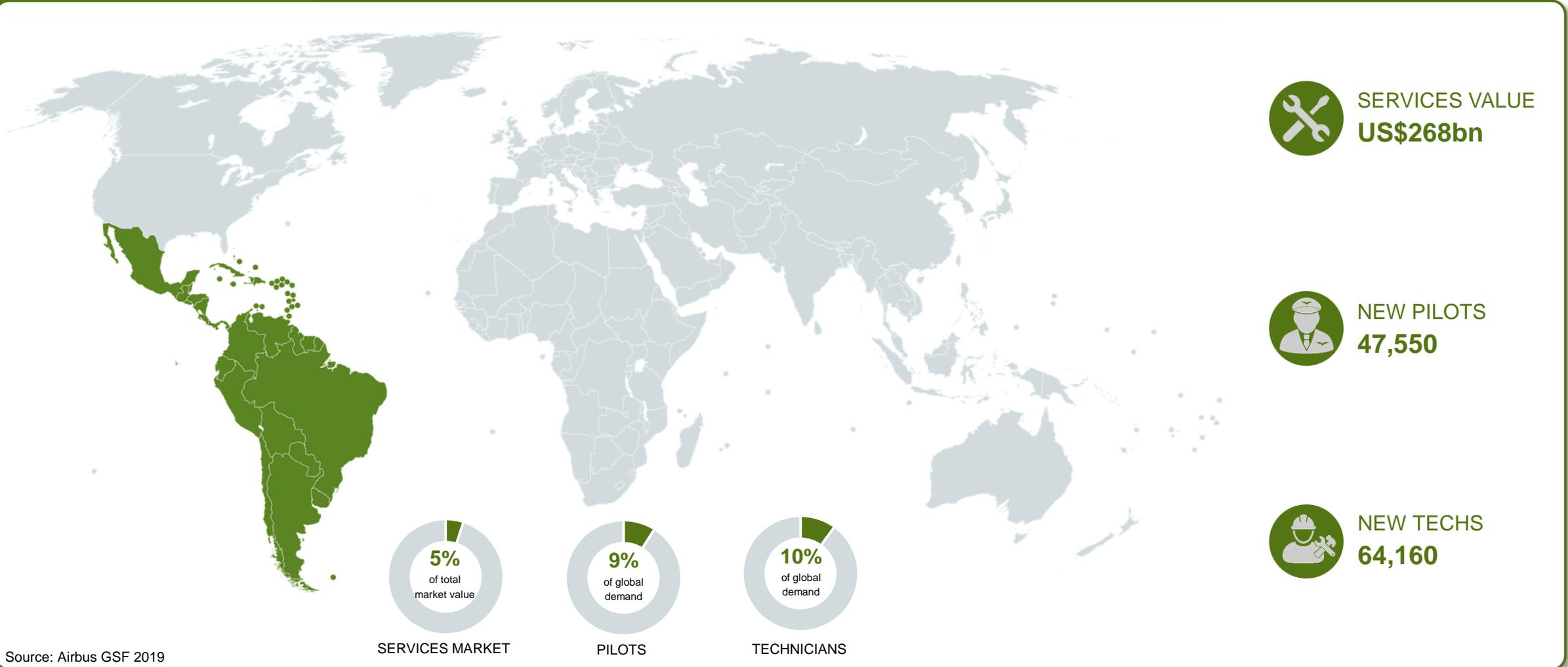
LARGE

100 aircraft

4% share of total new del

Services market in Latin America & the Caribbean worth a cumulative US\$268bn over the next 20 years

Services demand forecast



Source: Airbus GSF 2019

¡Muchas gracias!

Thank you!

Obrigado!



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