

# **Top Operational Concerns LATAM – CARIBBEAN's**

*Second Meeting of the Regional Aviation Safety Group  
Bogotá, Colombia – November 05<sup>th</sup>, 2009*

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Executive Director

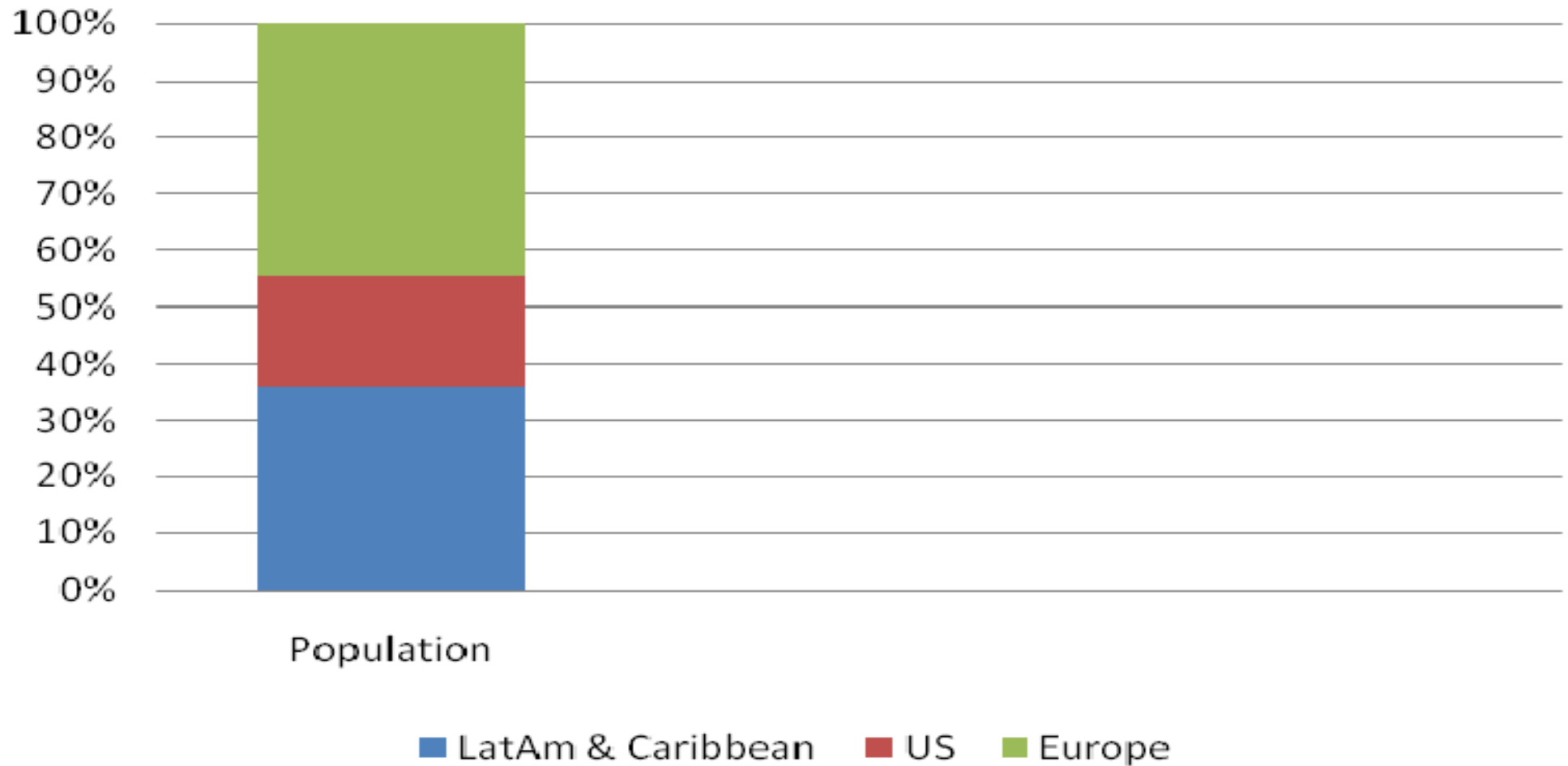


# The Region at a Glance

- Over 600 million people in 43 countries, 9% of world population
- 52% of population in Brazil and Mexico
- 6.2% of world traffic
- 95 airlines with over 1,000 aircraft

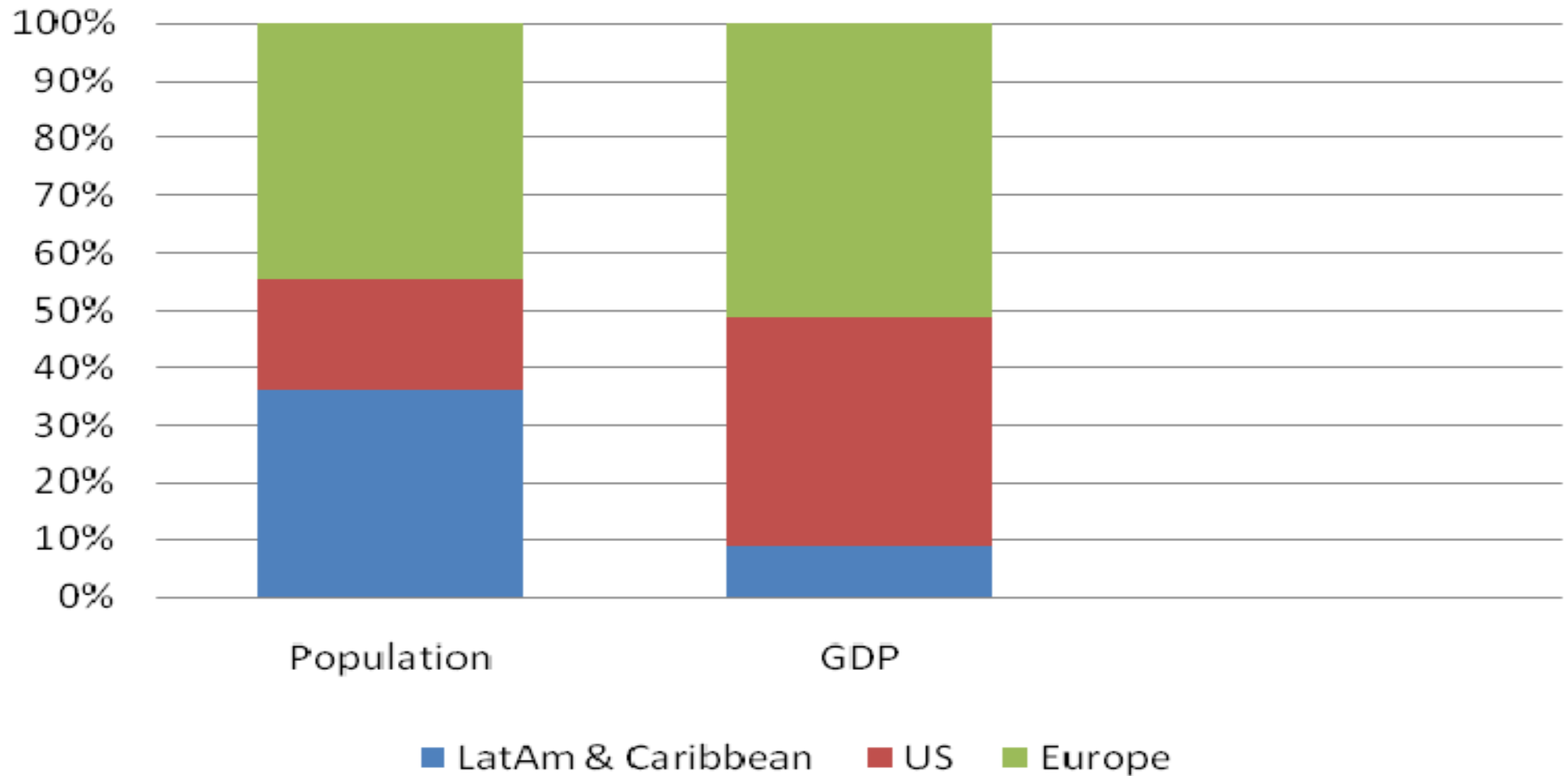
# The Region at a Glance

## In Perspective



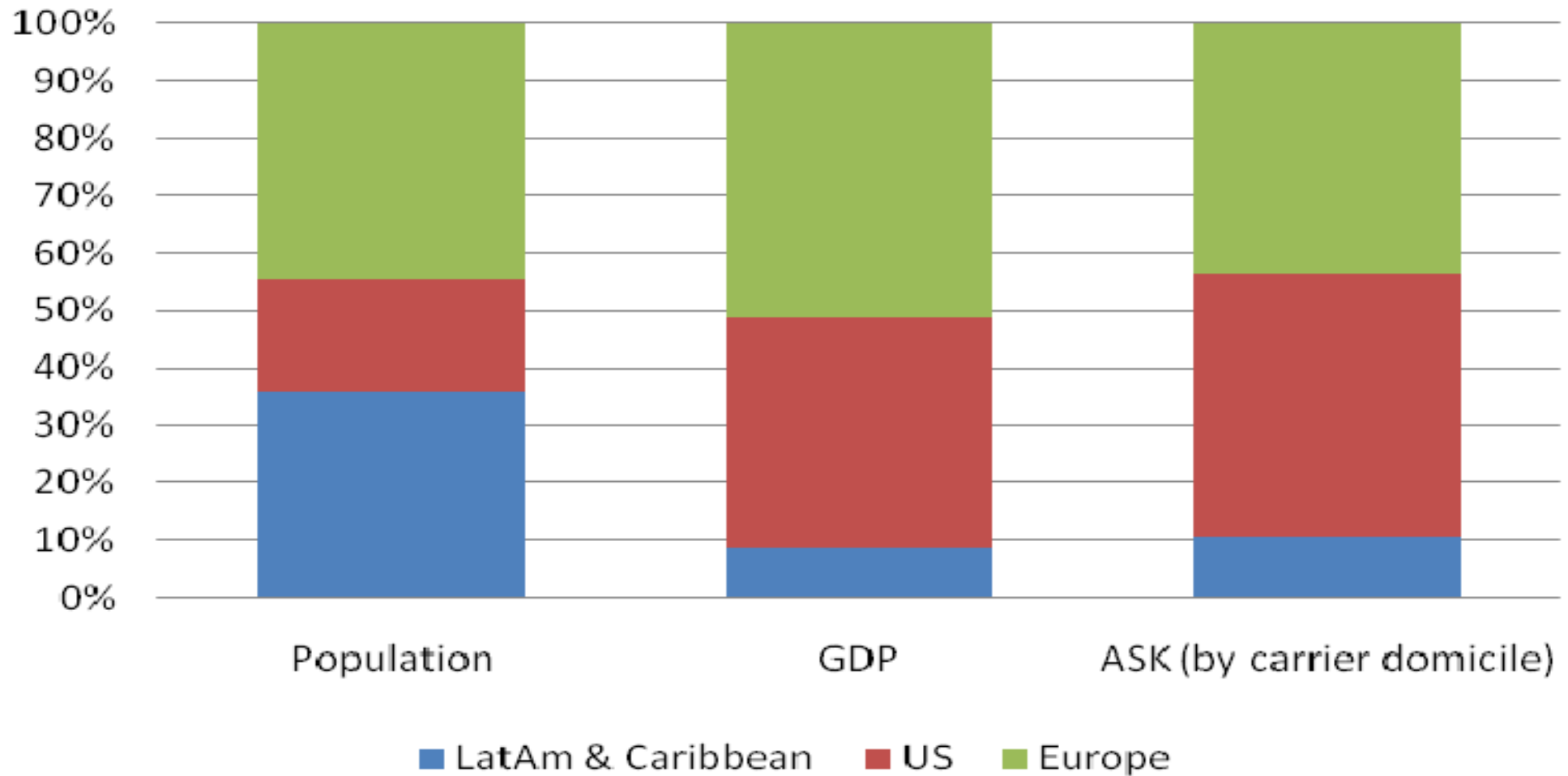
# The Region at a Glance

## In Perspective



# The Region at a Glance

## In Perspective



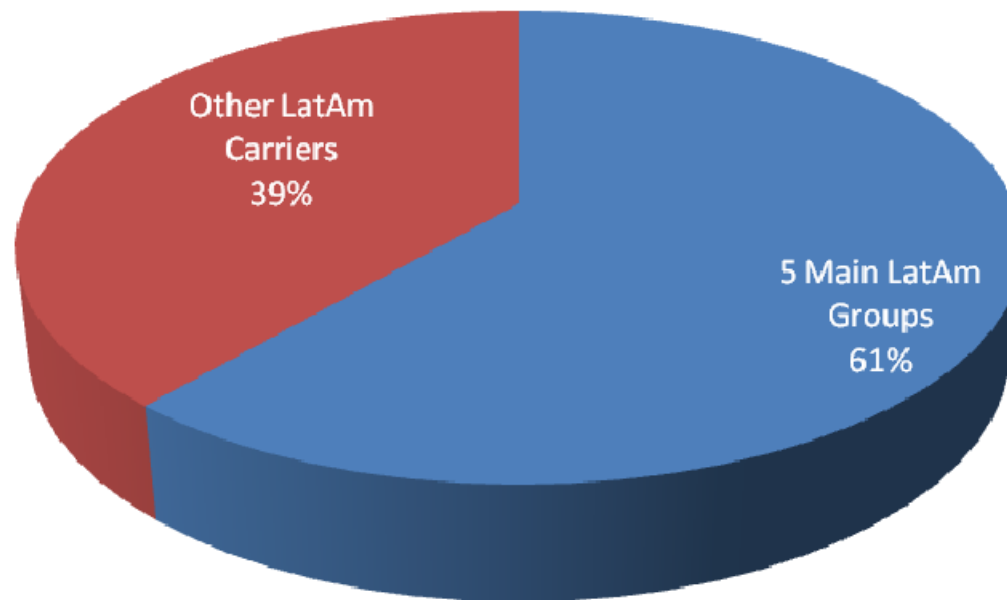
# The Region at a Glance

## Consolidation is Heating Up



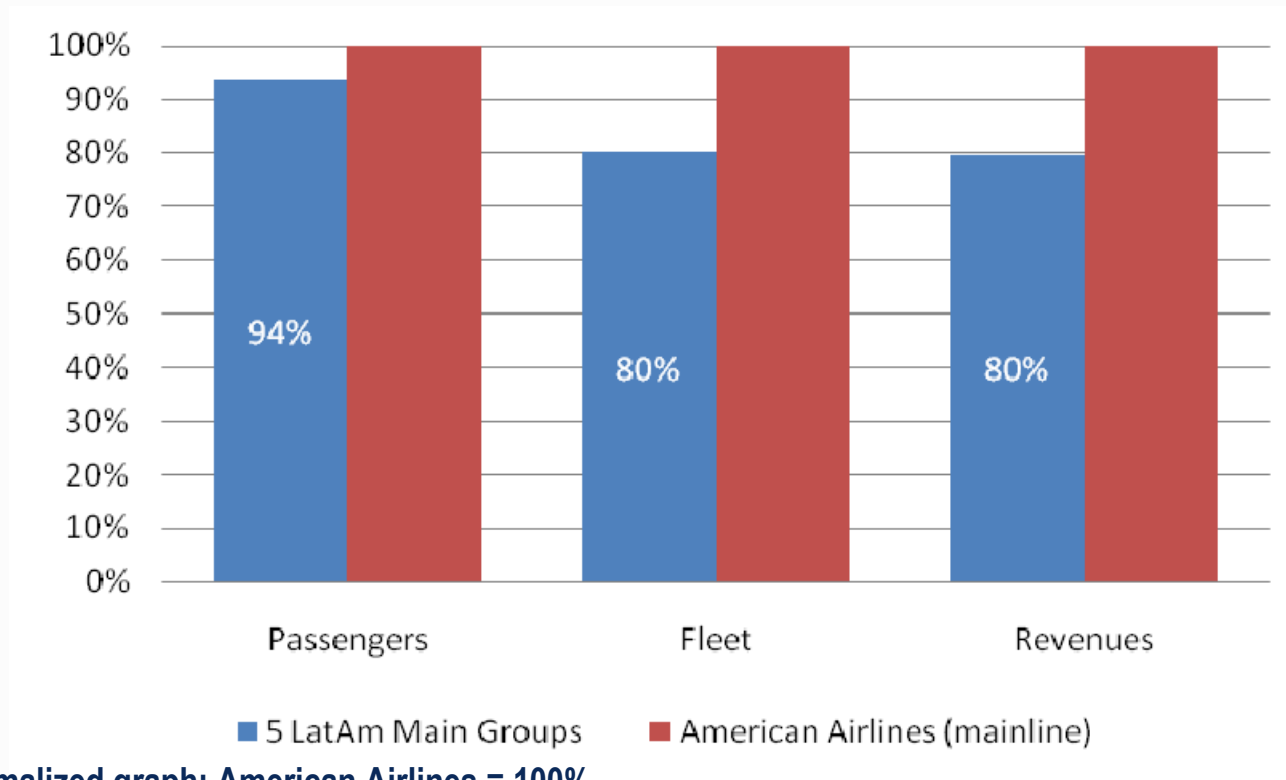
# The Region at a Glance

61% of ASKs Flown by 5 Main Groups



# The Region at a Glance

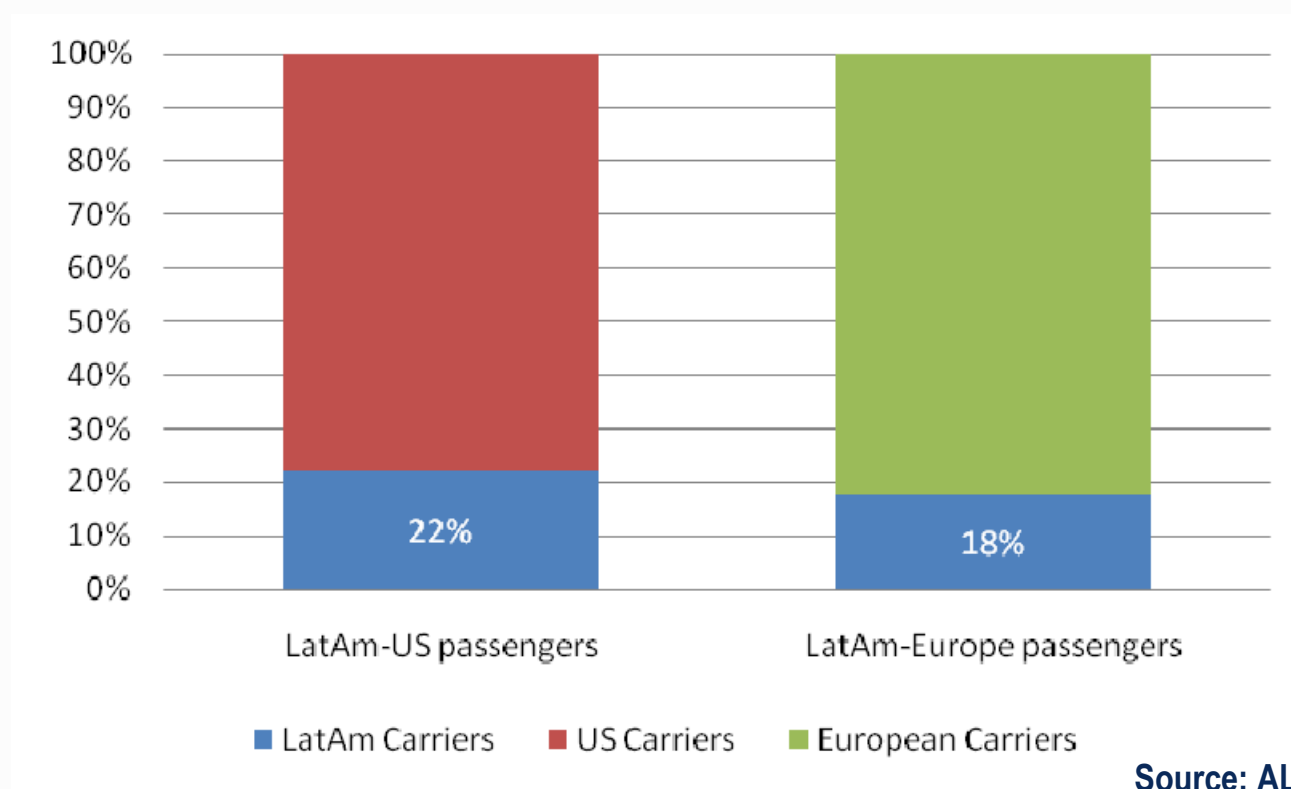
But Still Smaller Than 1 U.S. carrier





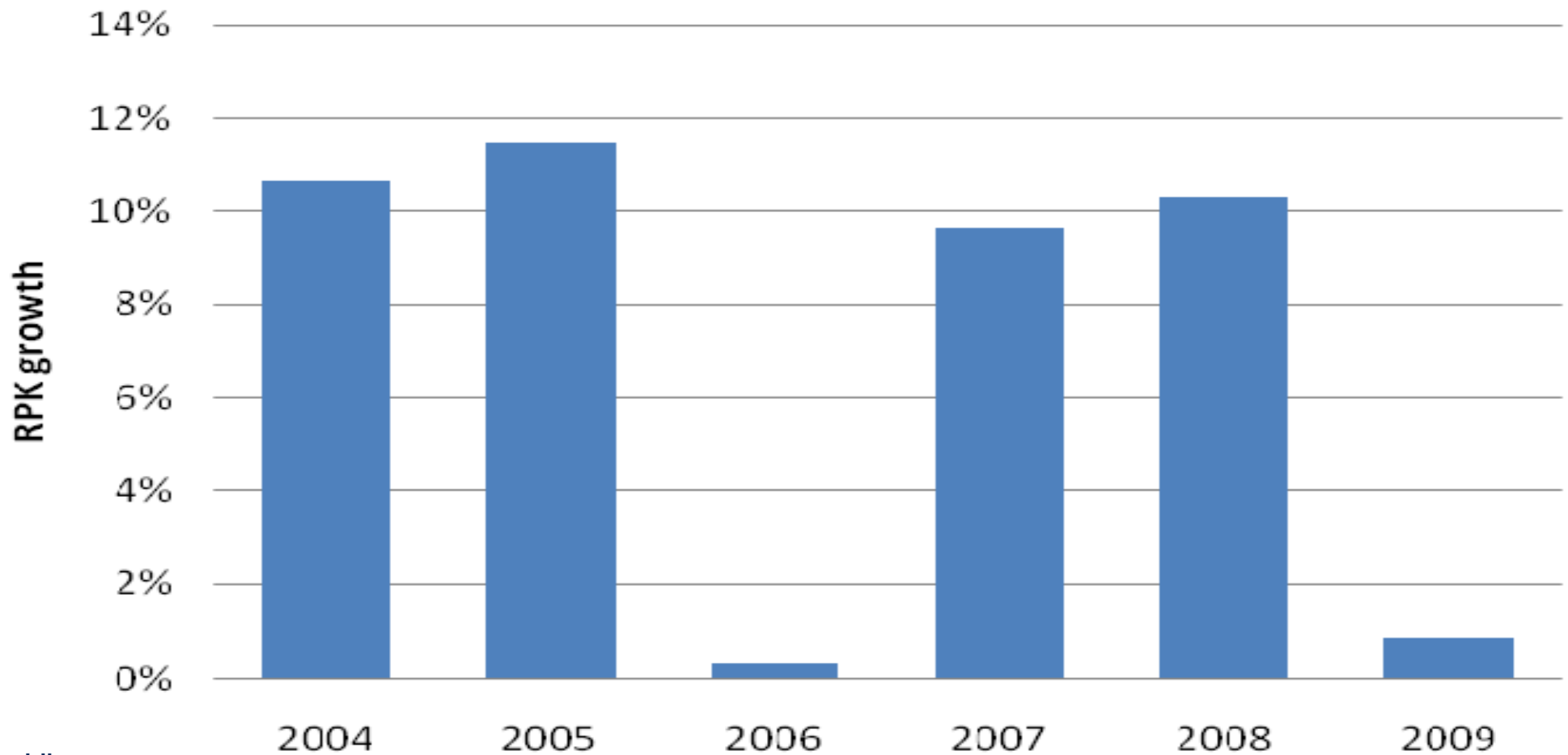
# The Region at a Glance

## Still Playing Catch Up



# The Region at a Glance

Low traffic share, but high traffic growth\*



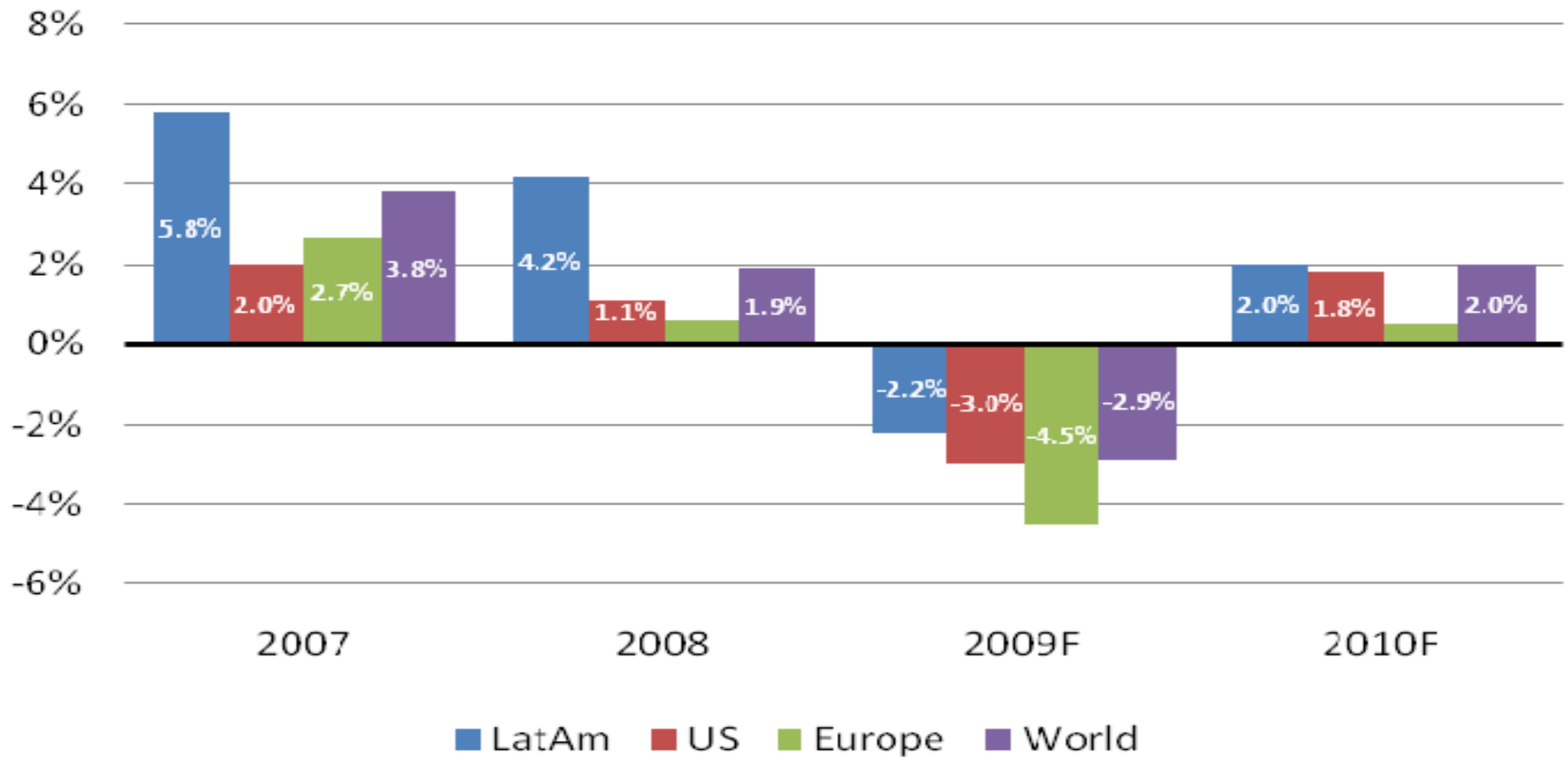
Notes: 2006 results affected by Varig crisis; 2009 partial results (Jan-Aug)

LTA airlines  
y



# The Region at a Glance

## Real and Expected GDP Growth



# The Region at a Glance

Airbus predicts considerable growth...

Traffic by airline domicile

RPKs (billions)

0 500 1,000 1,500 2,000 2,500 3,000 3,500

Asia

2008 traffic

2009-2029 growth

Europe

North America

Middle East

Latin America

CIS

Africa

20-year  
growth

% of 2028  
World RPKs

6.0%

33%

4.3%

26%

2.4%

20%

6.9%

8%

5.8%

6%

5.9%

4%

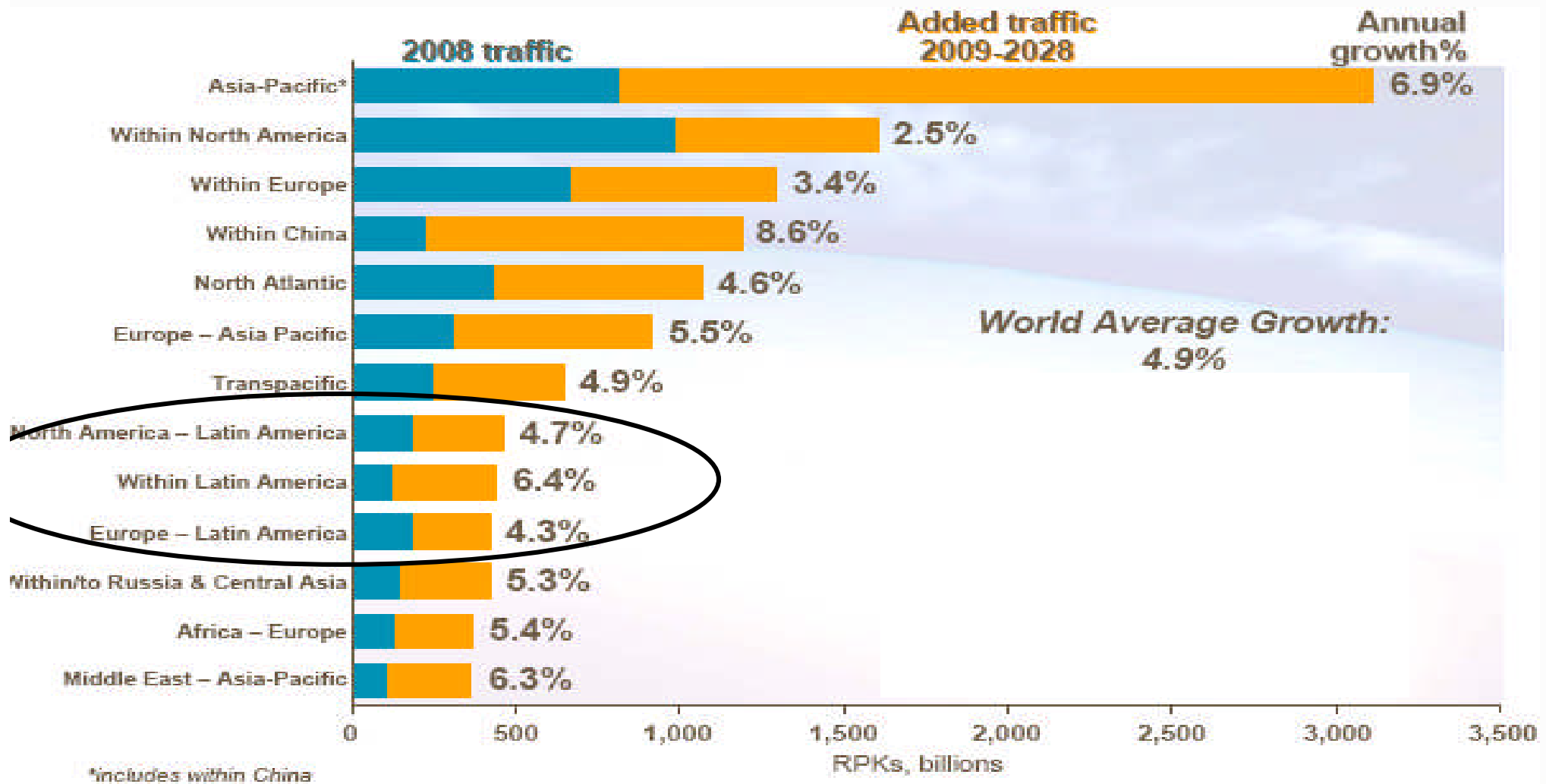
5.2%

3%



# The Region at a Glance

...and Boeing does as well



# The Region at a Glance

..... with Declining Yields

- LatAm real yields **down 1%** per year in last decade
- Fueled by
  - Mexico: over 15% decline in last 3 years
  - Brazil: over 20% decline in last decade

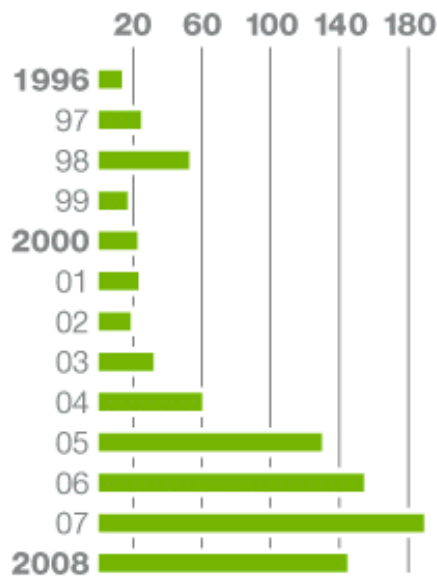
Source: Bain



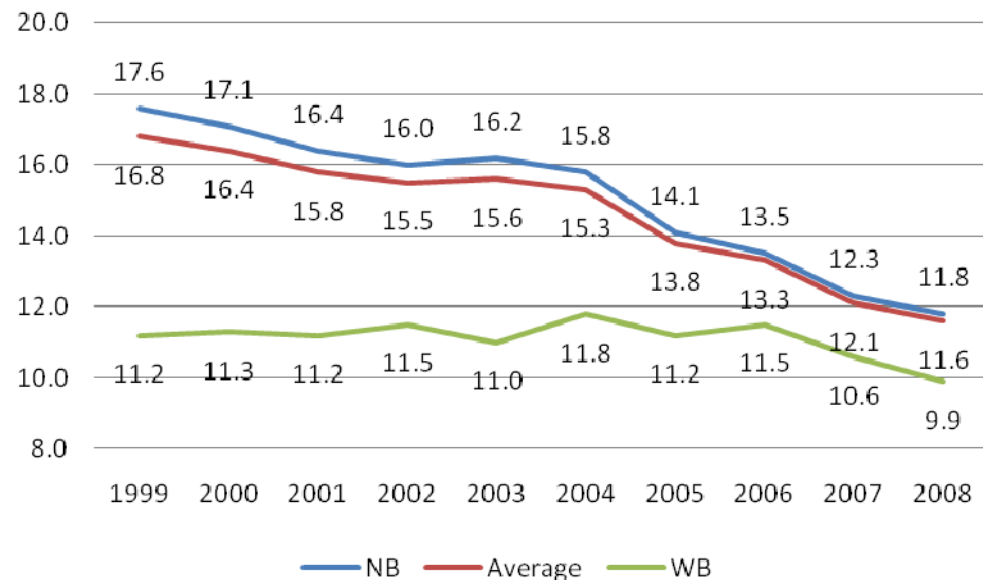
# The Region at a Glance

## ....and Big Investments

### New Aircraft Orders



### Fleet Age (Narrow, Wide Body)



**The region has great potential...**

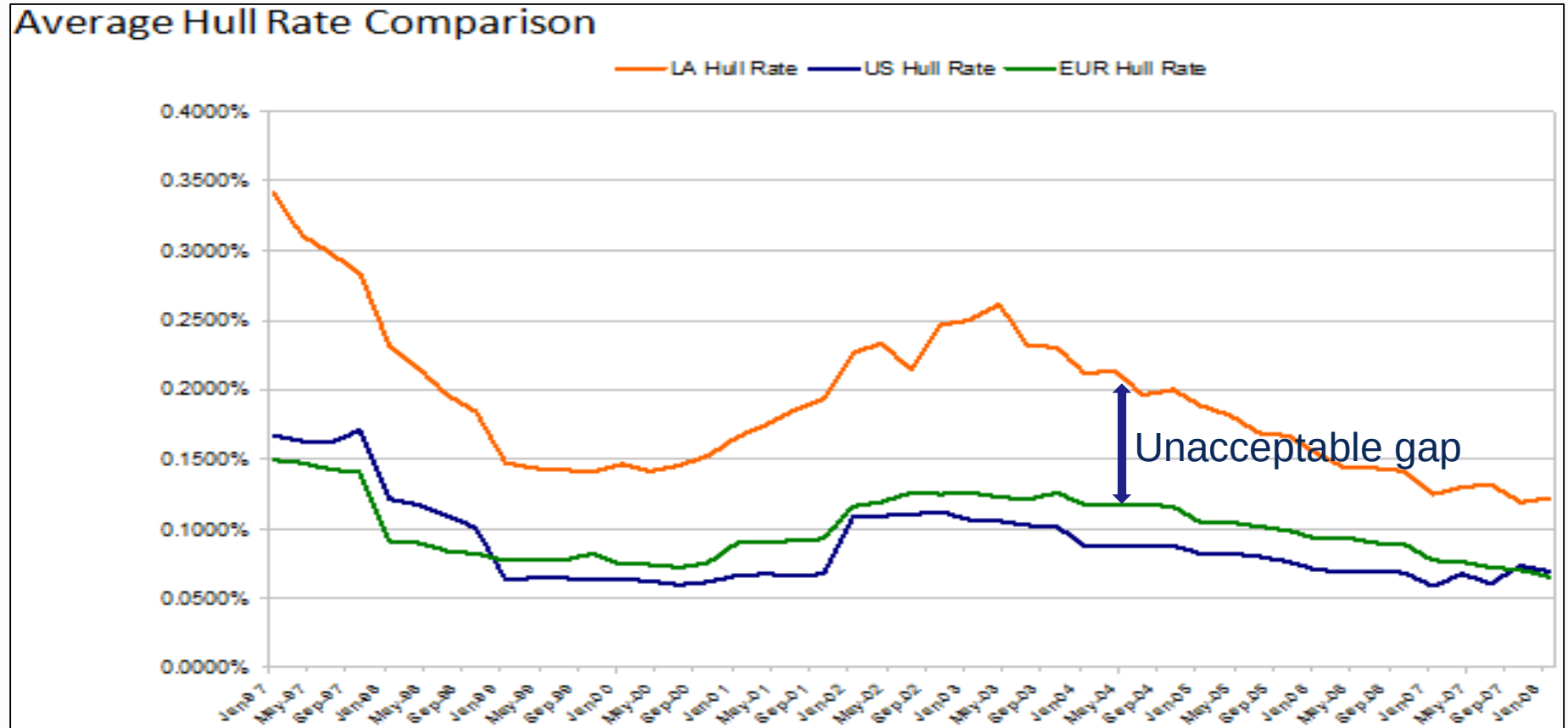
**but there are still some key challenges**





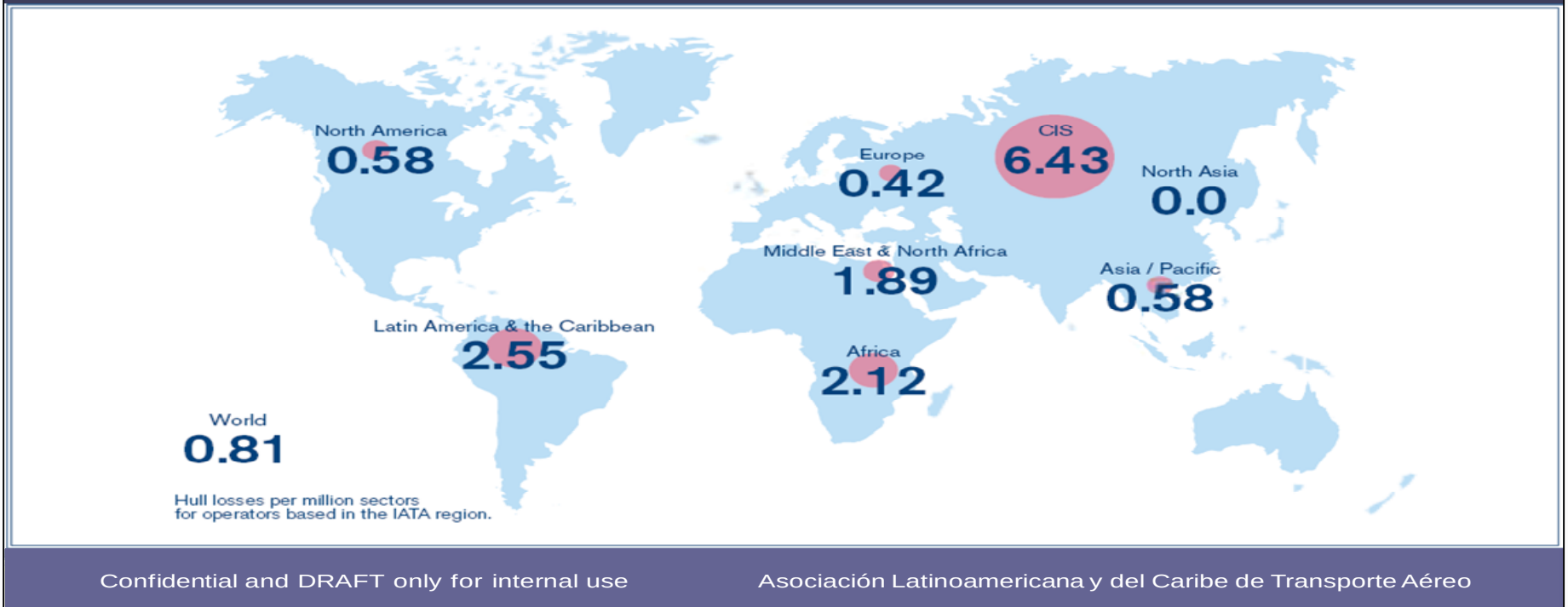
# SAFETY #1 Priority

The trend in the region has been positive over the last decade,



however, global statistics positions Latin America and the Caribbean as **the second worst region in accident rates during 2008**, falling even below Africa:

# 2008 Western-built Jet Hull Loss Rate by Region



Source: IATA Safety Report 2008.

And, even though the trend in the first half of 2009 for **LATAM** is 0.00 (\*)

# ALTA's SAFETY OBJECTIVES

The presidents and members of ALTA have set up the following OBJECTIVES for its members:

- To help develop safer air transport in the region by decreasing western built jet hull losses to US levels by 2014
- To support the creation and implementation of a unique safety oversight entity in Central America



# Latin America & the Caribbean

19 Accidents

IATA Members **21%**

Hull Losses **68%**

Fatal **26%**

 **84%**  
Passenger

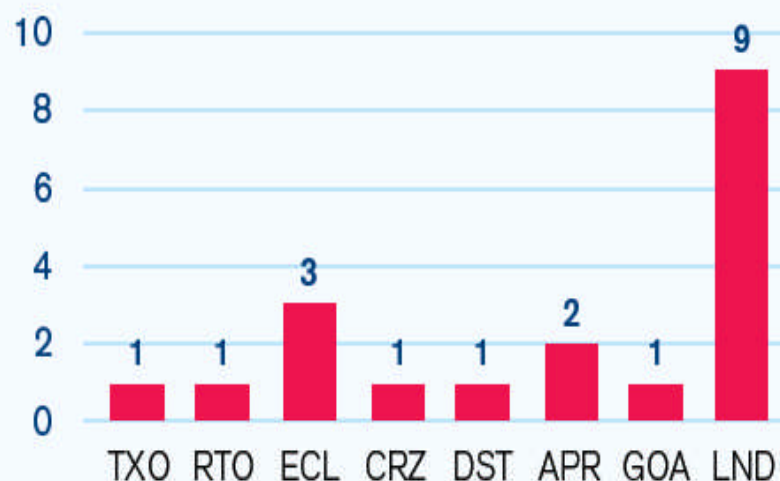
 **5%**  
Cargo

 **11%**  
Ferry

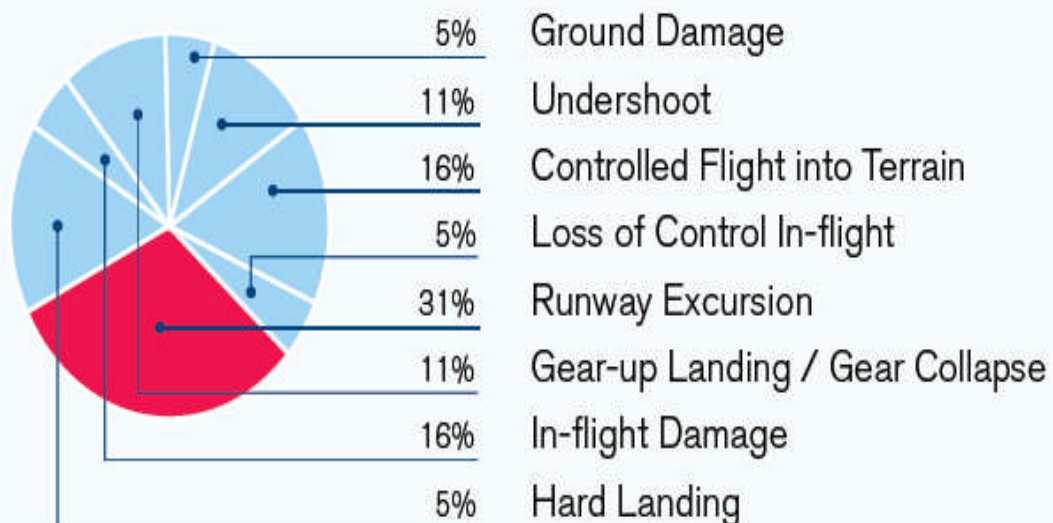
 **42%**  
Jet

 **58%**  
Turboprop

## Accidents per Phase of Flight\*



## Breakdown per Accident Category



Source: IATA Safety Report 2008.

# TOP - Frequent Errors (from FDA information)

## for ALTA members

|                                                                                                                                                                                                             |   |                                                                                                             |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|-------------------------------------------------------------------------------------------------------------|
| <p>The analysis of frequent errors expressed by ALTA members, allows to determine that it is important to prioritize the work towards</p> <p><b><u>UNSTABILIZED</u></b></p> <p><b><u>APPROACHES</u></b></p> | 1 | High speed in different configurations, surpass the speed limit (taxing, rotation, climb, <b>approach</b> ) |
|                                                                                                                                                                                                             | 2 | GPWS warning <b>during approach</b> (EGPWS, Glide Slope Visual Alerts, deviation below 500, 1000 ft)        |
|                                                                                                                                                                                                             | 3 | Long / short flares for landing                                                                             |
|                                                                                                                                                                                                             | 4 | <b>Unstabilized approaches</b>                                                                              |
|                                                                                                                                                                                                             | 5 | Speed limit exceedance in flaps operation (Wrong flight technique during Go Around)                         |

# TOP – Frequent Operational Concerns for ALTA members

## Latin America Region

|                                   |   |                                                                                                                                                                                                                                                                                      |
|-----------------------------------|---|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Airport<br>Infrastructure<br>Area | 1 | <b>Wildlife hazards</b> (impact of bird strike and wildlife prevention at airports)                                                                                                                                                                                                  |
|                                   | 2 | <b>Airport infrastructure</b> (Ground conditions: construction, apron space, signs, approach lighting, contaminated runways, obstacles; Damage to aircraft on apron; Aeronautical information: coverage and interference of communications, ease and reliability of weather reports) |
|                                   | 3 | <b>FOD's (<i>Foreign Object Damage</i>) on aprons</b> (trash, tools)                                                                                                                                                                                                                 |
| ATC –<br>TCAS (RA)<br>Area        | 4 | <b>TCAS – RA</b> (near mid air collisions and events)                                                                                                                                                                                                                                |
|                                   | 5 | <b>ATC</b> (training, phraseology, education and rotation of operations personnel)                                                                                                                                                                                                   |



# TOP – Frequent Operational Concerns for ALTA members

## Caribbean Region

|   |                                                                             |
|---|-----------------------------------------------------------------------------|
| 1 | <b>Infrastructure</b> (navigation aids, surveillance facilities, lighting ) |
| 2 | <b>TCAS</b> (non control airspace)                                          |
| 3 | <b>Bird strike</b>                                                          |
| 4 | <b>Runway procedures</b> (wet runway operations)                            |
| 5 | <b>Non precision approaches</b>                                             |

## Critical Airports - for ALTA members in LATAM

|                                                            | X                | First                  | STATE OF AIRPORTS / MAIN CONCERNS |           |     |  |  |
|------------------------------------------------------------|------------------|------------------------|-----------------------------------|-----------|-----|--|--|
|                                                            | X                | Second                 |                                   |           |     |  |  |
|                                                            | X                | Third                  |                                   |           |     |  |  |
|                                                            | X                | Also relevant          |                                   |           |     |  |  |
| Airports                                                   | Concerns         |                        |                                   |           |     |  |  |
|                                                            | 1                | 2                      | 3                                 | 4         | 5   |  |  |
|                                                            | Wildlife hazards | Airport infrastructure | FOD's on aprons                   | TCAS – RA | ATC |  |  |
| <b>Mexico City</b>                                         | X                | X                      | X                                 | X         | X   |  |  |
| <b>La Aurora</b> <i>(Guatemala)</i>                        |                  | X                      | X                                 | X         | X   |  |  |
| <b>Maiquetía Simón Bolívar</b> <i>(Caracas, Venezuela)</i> |                  | X                      |                                   | X         | X   |  |  |
| <b>Toncontin</b> <i>(Tegucigalpa, Honduras)</i>            | X                |                        |                                   |           |     |  |  |
| <b>John F. Kennedy</b> <i>(New York, USA)</i>              |                  |                        | X                                 |           |     |  |  |
| <b>Juan Santamaría</b> <i>(San José, Costa Rica)</i>       |                  |                        |                                   | X         |     |  |  |
| <b>Tocumen</b> <i>(Panamá)</i>                             | X                |                        |                                   | X         |     |  |  |
| <b>Galeão</b> <i>(Rio de Janeiro, Brasil)</i>              |                  |                        | X                                 |           |     |  |  |
| <b>Cancun</b> <i>(Quintana Roo, Mexico)</i>                |                  | X                      | X                                 |           | X   |  |  |



# A pragmatic approach:

Working as a team on manageable achievable tasks through the joint work with the Regional Aviation Safety Group - RASG-PA and all the key stake holders it represents, on the higher priority risks identified in the LATAM CAR region.

Requesting the Highest industry safety standards from our members: IOSA

Promoting the exchange of measures and best practices for improving safety processes. (1Q 2010 regional industry conference)

Avoiding duplication



# Thank you for your attention!



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**ALTA supports the creation and implementation of a unique regulator entity:**

## **Central American Aviation Regional Agency**

- **The agency will manage the uniformity of normative, including standards and several processes (regulations, organizations, personnel, runways and auxiliary services, etc), and the technical ability certification for all of the Central American operators.**
- **The agency will implement in an organized and global way the interstate relations.**

