

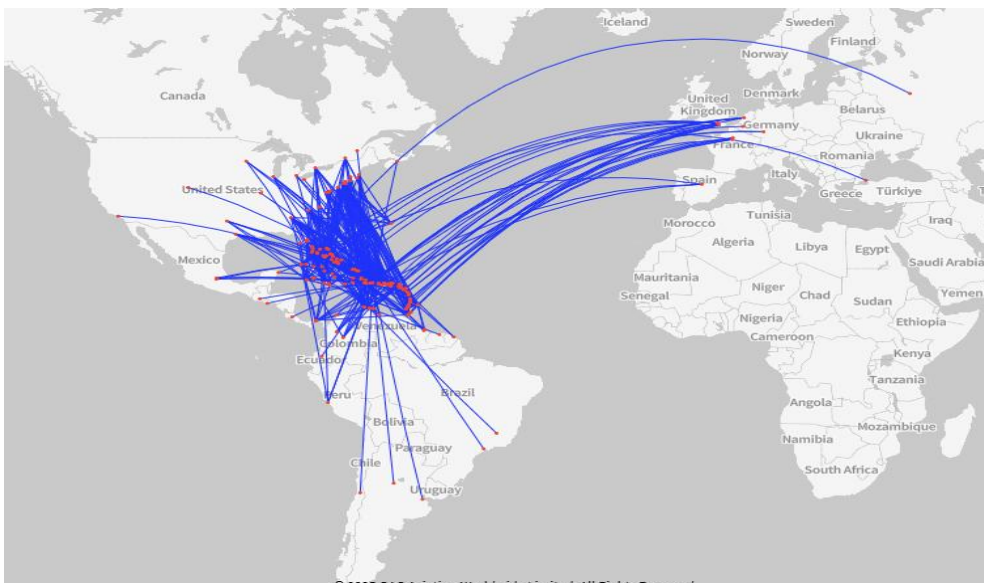
# Caribbean Aviation Outlook and IATA Local Office Presentation

July 30, 2025



# Connectivity Patterns for the Caribbean

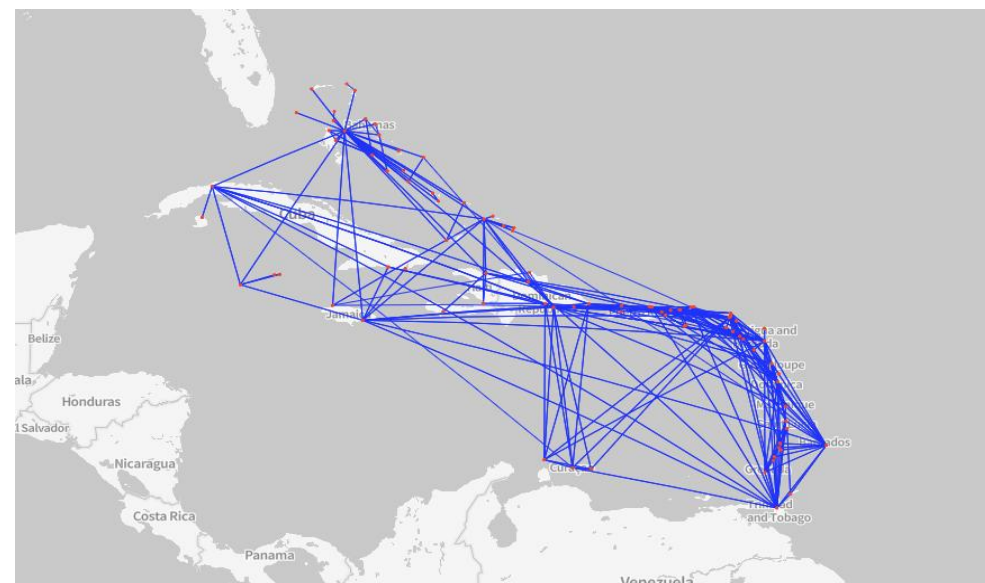
## To/From/Within Caribbean



### 1H - 2025

<b>1.055 Routes</b>	<b>-1.0% Routes vs 1H-2024</b>	<b>-0.4% Routes vs 1H-2015</b>
<b>258,206 Frequencies</b>	<b>+4,8% Frequencies vs 1H-2024</b>	<b>+9.3% Frequencies vs 1H-2015</b>
<b>22,268,108 Seats</b>	<b>+0.8% Seats vs 1H-2024</b>	<b>+24.3% Seats vs 1H-2015</b>

## Intra - Caribbean

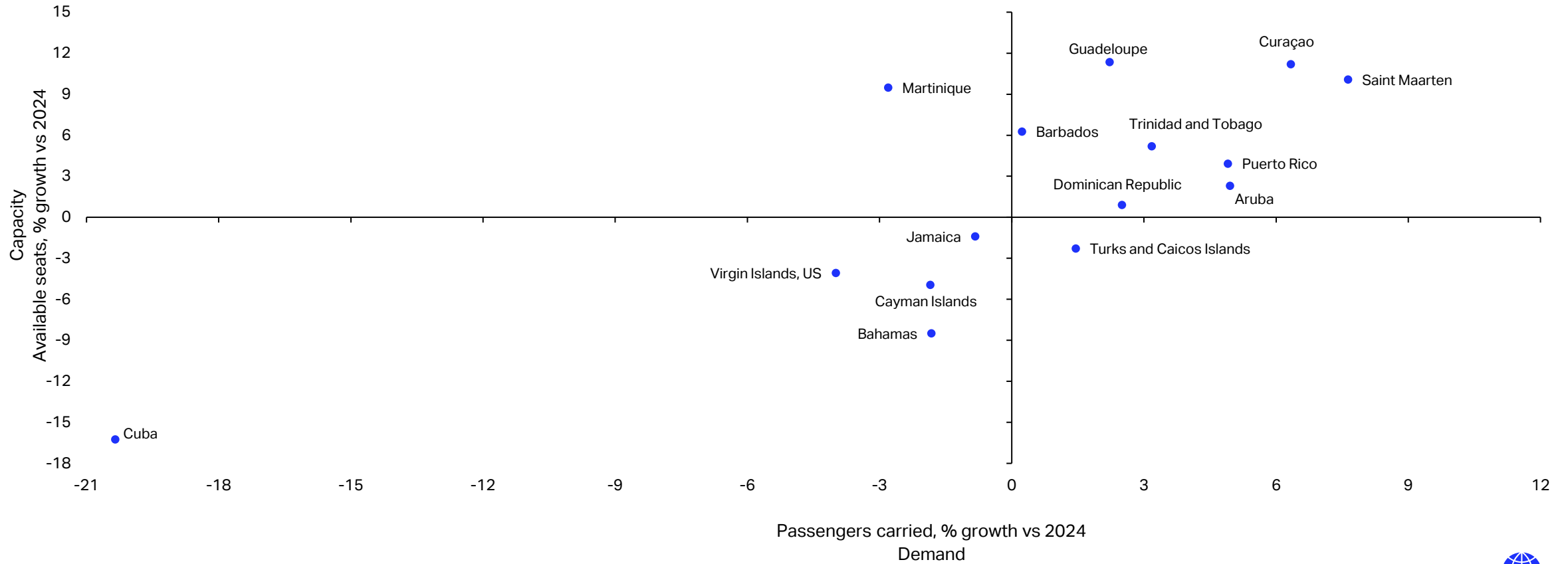


### 1H - 2025

<b>435 Routes</b>	<b>+0.2% Routes vs 1H-2024</b>	<b>-5.0% Routes vs 1H-2015</b>
<b>159,924 Frequencies</b>	<b>+8.0% Frequencies vs 1H-2024</b>	<b>-0.4% Frequencies vs 1H-2015</b>
<b>6,055,653 Seats</b>	<b>+4.5% Seats vs 1H-2024</b>	<b>-4.5% Seats vs 1H-2015</b>

# Seat capacity increasing to allocate growing demand in the Caribbean.

Total available seats and passengers for the top 15 markets in the Caribbean (1H-2025 vs 1H-2024)



Source: IATA Sustainability and Economics based on data from OAG and DDS



# 2025 estimated Net post-tax profit per passenger USD 7.2

**Middle East: USD 27.2**

**N. America: USD 11.1**

**Europe: USD 8.9**

**Lat. Am./Car: USD 3.4**

**Asia Pacific: USD 2.6**

**Africa: USD 1.3**



Caffè Latte

Grande 16 fl oz



Subtotal..... \$5.25

Tax..... \$0.37

**Total..... \$5.62**

# The International Air Transport Association

- **Trade** association for the world's airlines
- 350 **members**, representing 80% of total air traffic
- **Mission**: to represent, lead, and serve the airline industry
- **Executive** Office: Geneva, Switzerland
- **Head** Office: Montreal, Canada
- 5 **Regional** Offices: Miami, Madrid, Amman, Beijing and Singapore
- **Local** Offices strategically located

# Caribbean Office

caribbeanall@iata.org

27  
Islands

Miami  
Based

3  
Team  
Members

**Annaleen Lord**  
Area Manager, Caribbean  
[bobba@iata.org](mailto:bobba@iata.org)



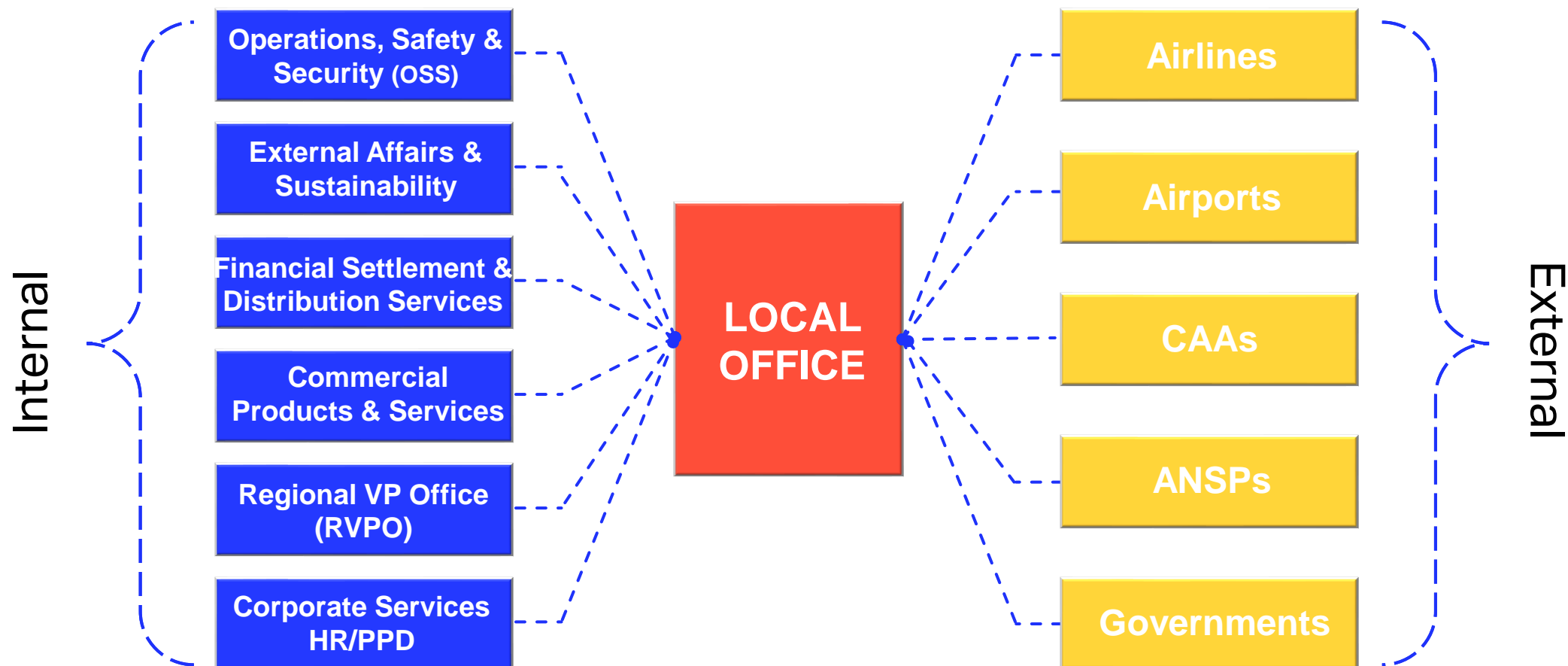
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# Role of the Local Offices at IATA



# Local Office Priorities

Guided by Member Airlines operating in the Market



- **Taxes, fees and charges (TFCs):** Airport charges, Air Navigation charges, tourism taxes, etc.
- **Airport Infrastructure:** New terminals, PPPs/Concessions, capacity constraints, ATM/ATS projects, etc.
- **Facilitation initiatives:** API/PNR, electronic E/D cards, automated border controls, etc.

# Making the most of our partnership

- Full adherence to ICAO principles
- Consider the broader aviation ecosystem
- Maintain channels of communication open
- We'll gladly put you in contact with the appropriate airline personnel
- Help us, help you!

Thank You  
[caribbeanall@iata.org](mailto:caribbeanall@iata.org)

