



BRAZILIAN CIVIL AVIATION **OVERVIEW**

CIVIL AVIATION SECRETARIAT

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**MINISTÉRIO DOS
TRANSPORTES, PORTOS
E AVIAÇÃO CIVIL**



- BRAZILIAN CIVIL AVIATION - INSTITUTIONAL FRAMEWORK

MINISTRY OF TRANSPORT, PORTS AND CIVIL AVIATION

- Formulation of Public Policies; Planning and Guidelines
- Governmental Coordination
- Airport Concessions Plan
- Manager of the Brazilian Civil Aviation Fund (FNAC)

INFRAERO

- State-owned airport authority

ANAC

- Technical and Economic Regulation
- Monitoring and Enforcement

Independent Agency

MIN. OF DEFENSE

- Military Aviation
- Air Navigation Services Provider and Regulation

– NATIONAL AIRPORT AUTHORITIES COMMISSION –
CONAERO



MAJOR GAINS

- Improving Infrastructure Utilization
- Ease of communication
- Centralized consultation forum
- Coordinated Actions
- Information integration
- Integrated Planning

– MAIN REGULATORY MEASURES – TIMELINE

1990

1991

Extinction of regional monopolies with the beginning of the flexibilization of Brazilian air transportation

2000

2001

Domestic air fare freedom

2005

2006

ANAC is Created

2010

2010

Air fare freedom for international flights

2015

2017

Air transport general conditions reviewed.

2020

2018+

Increase foreign capital in airlines by 100%



2001: The 5th CONAC promoted the extinction of SITAR allowing new companies to emerge.

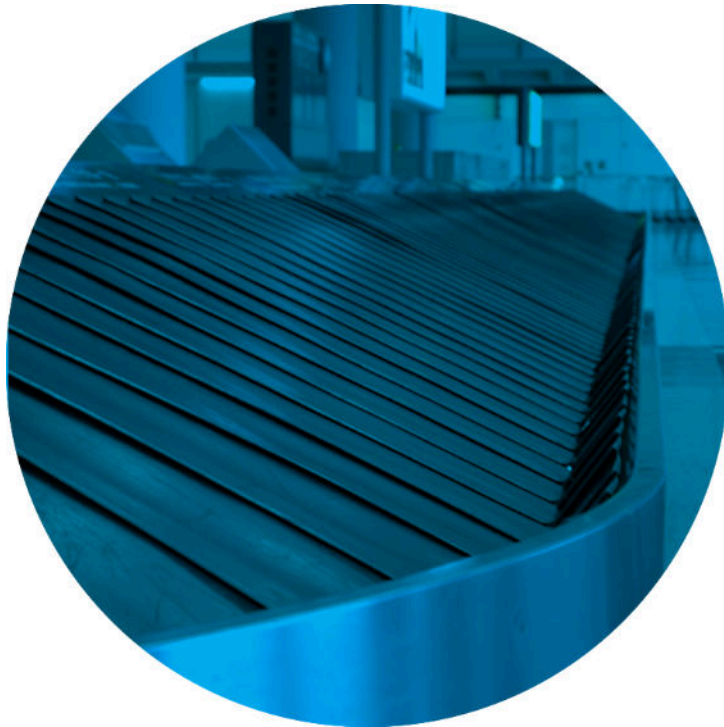


2009: Greater flexibility in civil aviation and private sector participation

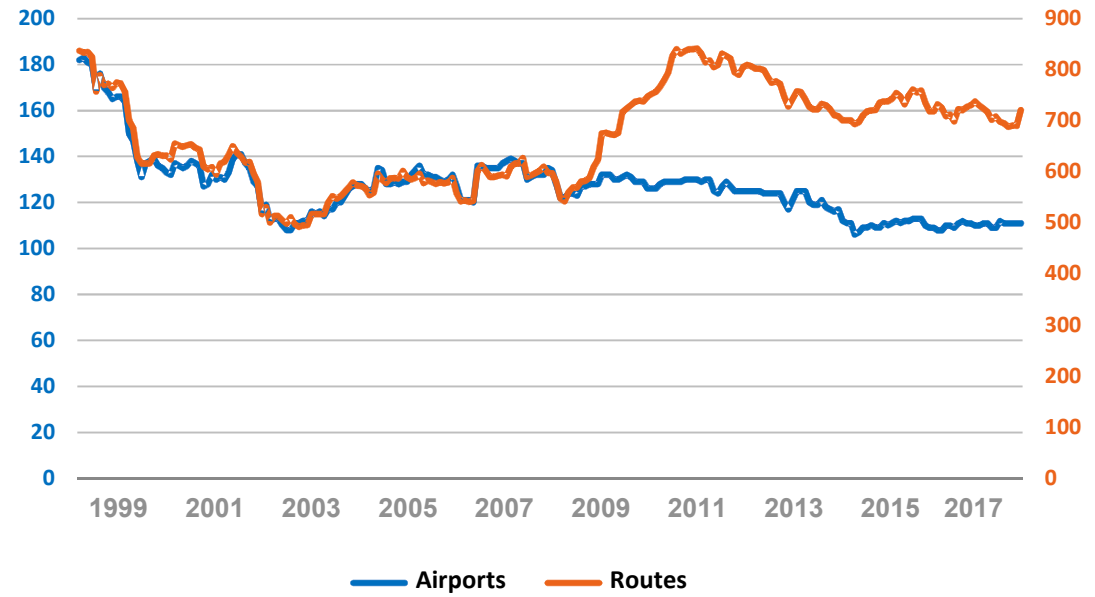


2017: Baggage allowances

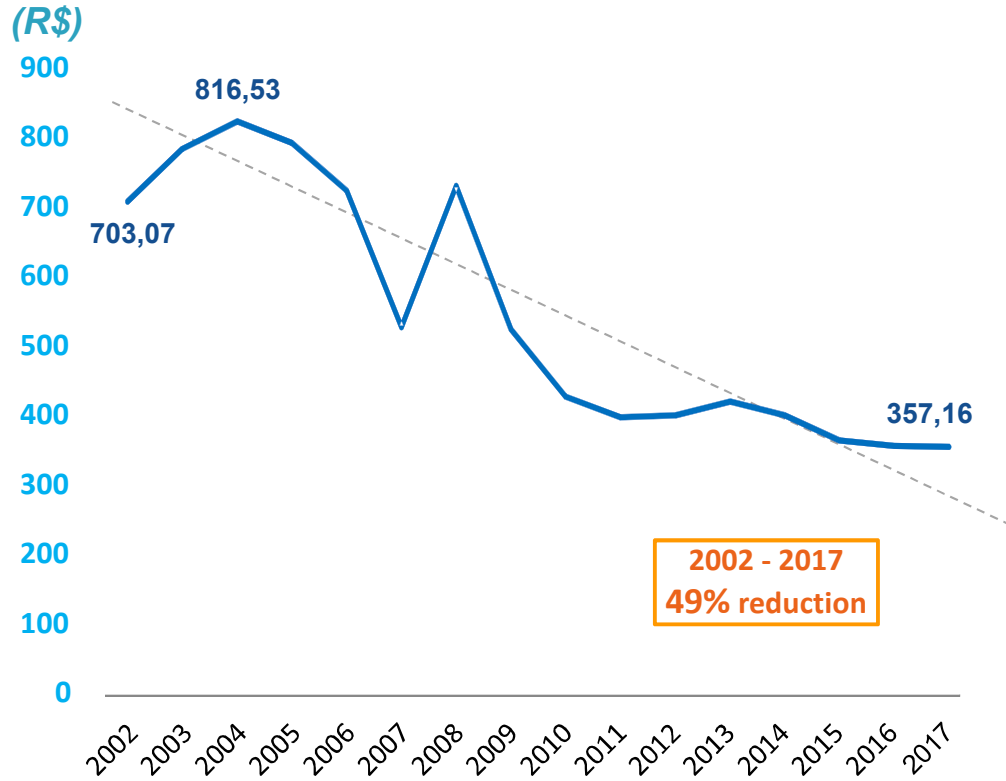
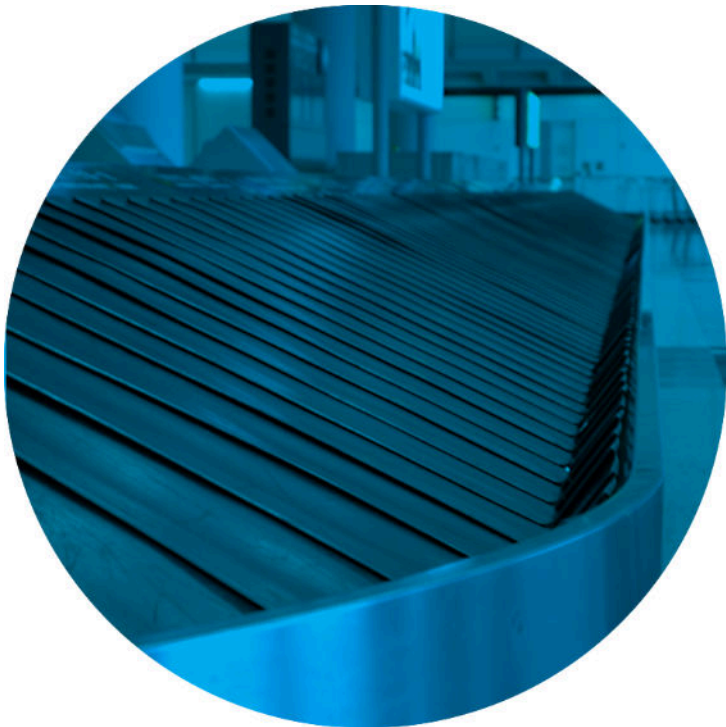
AIRPORTS X ROUTES



Number of airports and routes served by commercial flights



- EVOLUTION OF - DOMESTIC AIR FARES



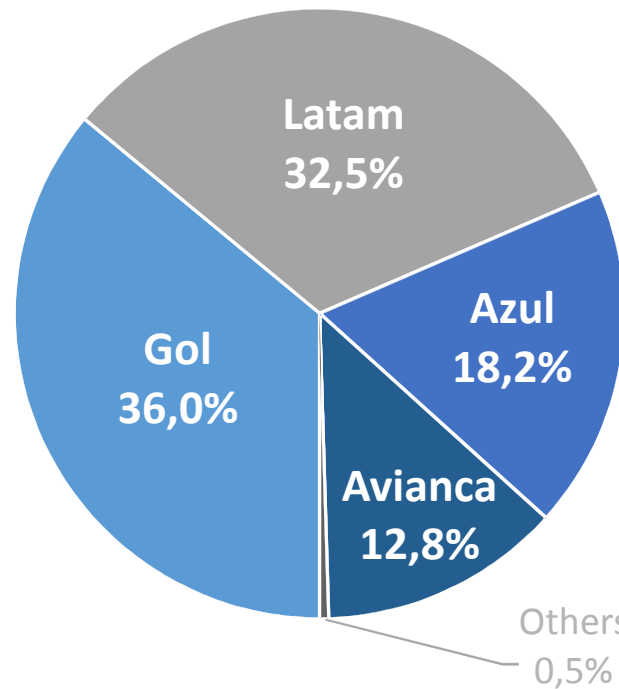
- MARKET AND INFRASTRUCTURE - BRAZILIAN AIR FLEET

479

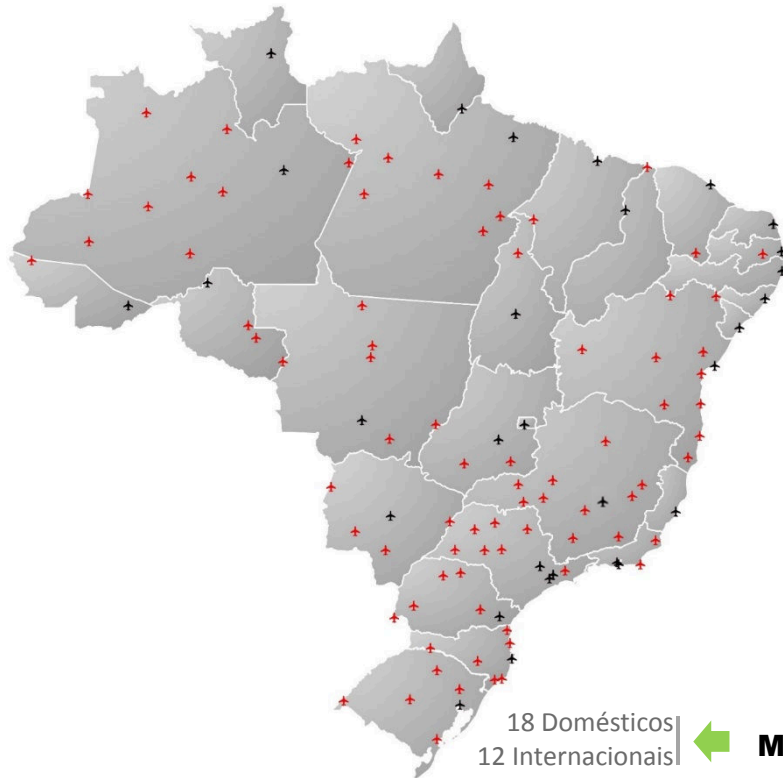
Schedule Flights
Airplanes

14.891

Airplanes with
Brazilian Registration
in airworthy condition



- MARKET AND INFRASTRUCTURE - BRAZILIAN AIRPORTS



1,961
PRIVATE OWNED

605
PUBLIC AIRPORTS

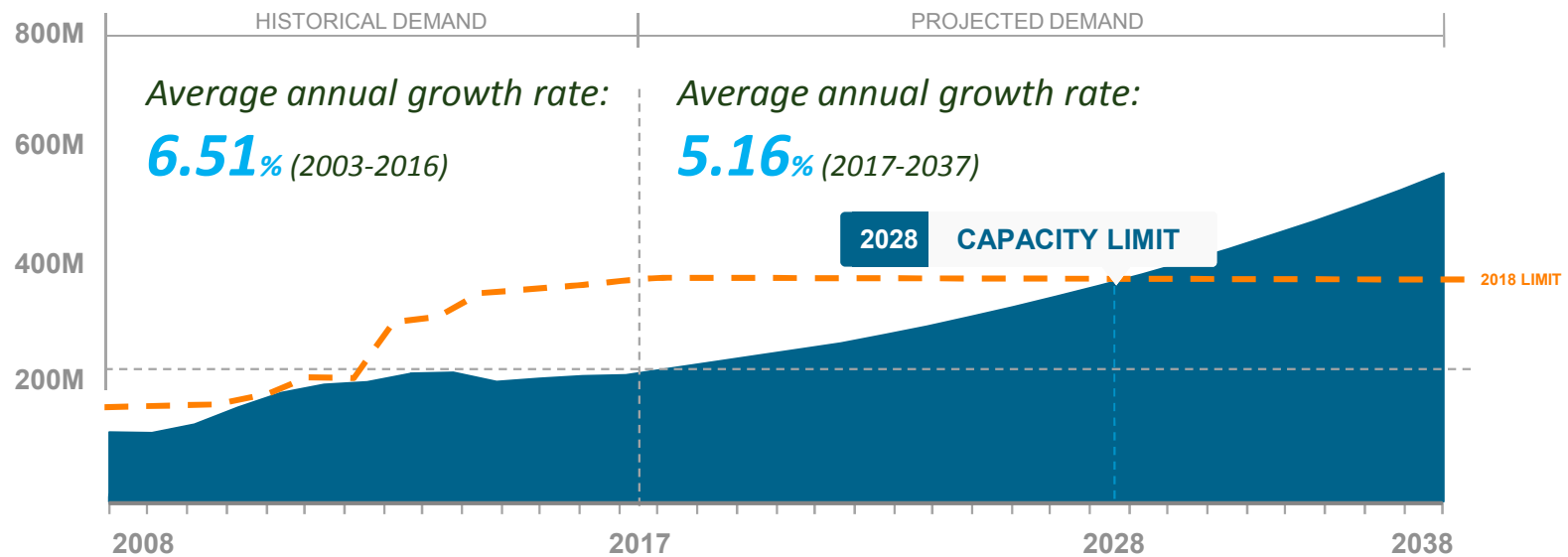


111
Receiving Schedule Flights

30
METROPOLITAN

81
REGIONAL

- BRAZILIAN REGULAR PASSENGERS - 20 AIRPORTS RESPONSIBLE FOR 90% OF DEMAND



	2018	2023	2028	2038
CAPACITY LIMIT	272,8	272,8	272,8	272,8
DEMAND FORECASTING	182,3M	220,6M	282,8M	401,0M

**CAPACITY
X
INVESTMENTS**



**National Air
Planning - PAN**



Objectives
Civil Aviation
Sector

NATIONAL AIR PLANNING

Objectives related - Airports net

ACCESSIBILITY

- Population up to 60min
- Population up to 120min
- Amazon Region
- Touristic Places

CONNECTIVITY

- Existing routes
- Potential routes

EFFICIENCY

- Travel time
- Investments/
pax

DEVELOPMENT

- Sustainability
- Market profitability
- Potential demand

Strategic Objectives

SAFETY/SECURITY

OPERATIONAL
EFFICIENCY

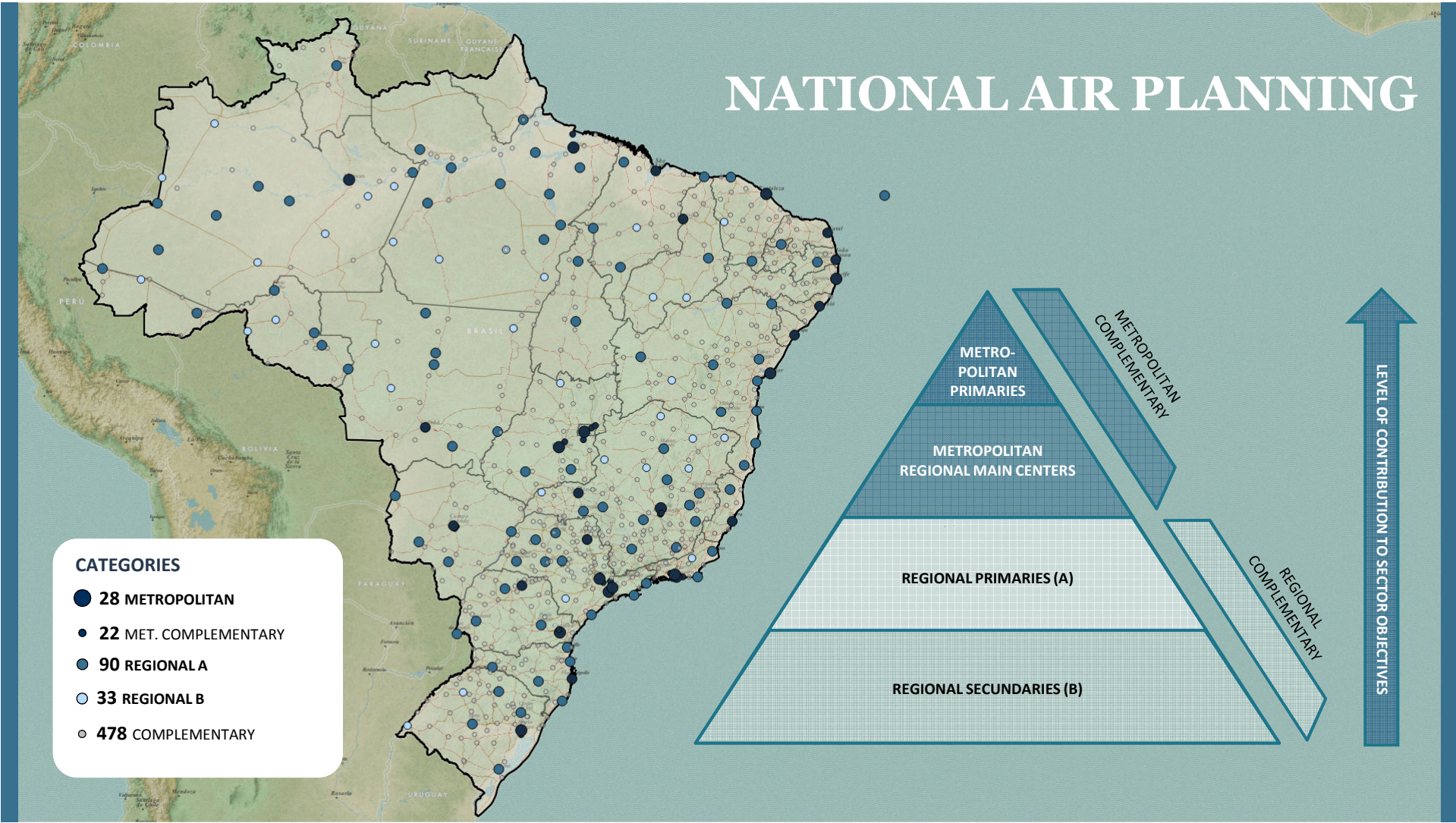
PASSENGER RIGHTS
RESPECTED

QUALITY & FACILITY

ENVIRONMENTAL
PROTECTION

TECHNICAL
IMPROVEMENTS

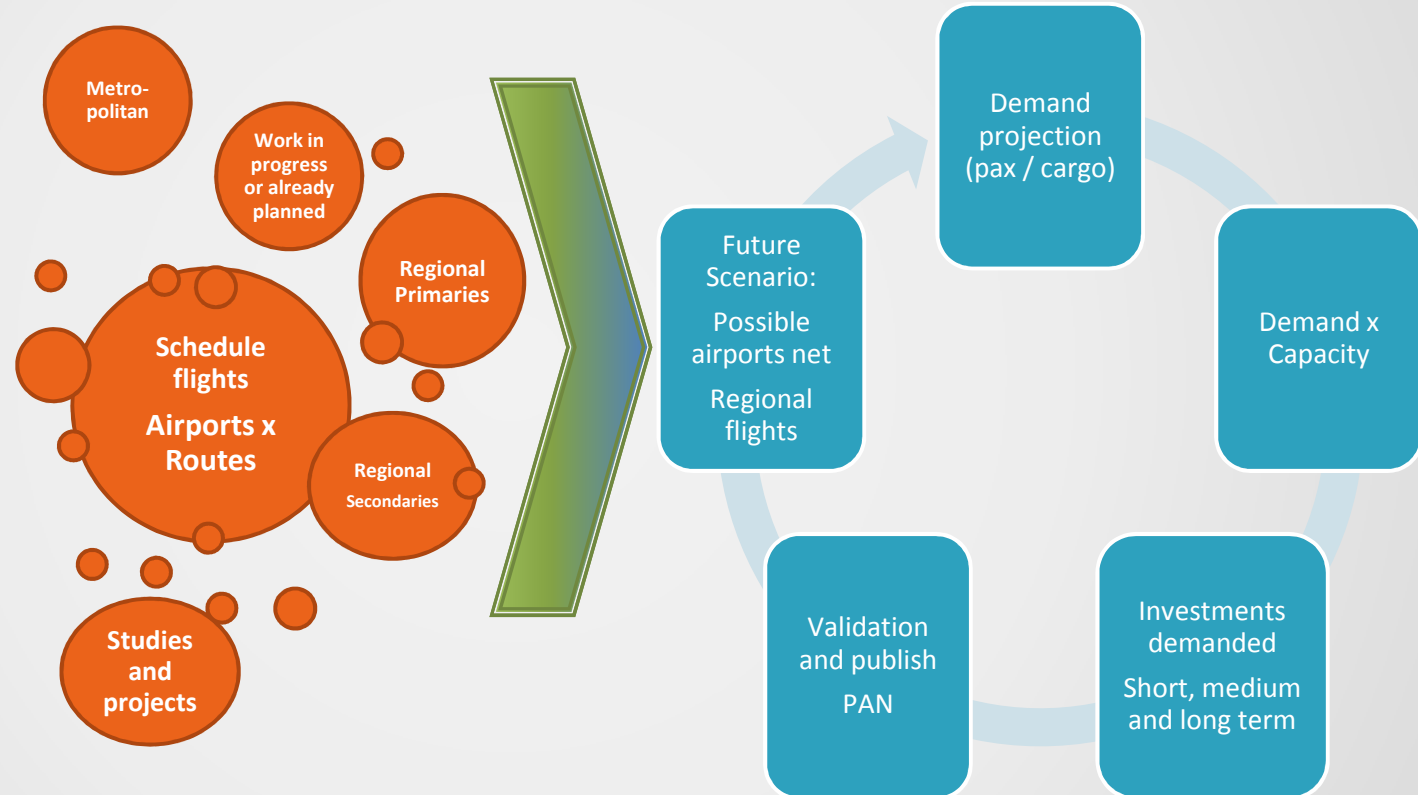
NATIONAL AIR PLANNING



– AIRPORT INFRASTRUCTURE – NATIONAL AIR PLANNING



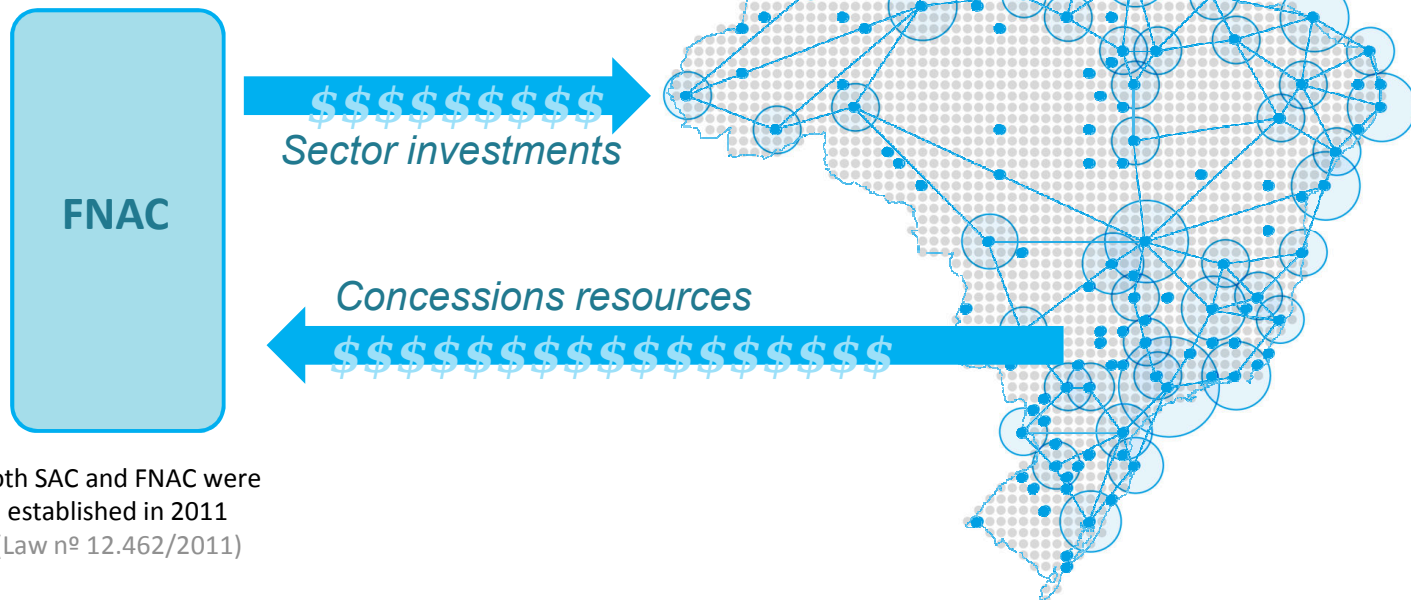
*Next steps:
simulation of
development
scenarios*



- FINANCING INVESTMENTS - BRAZILIAN CIVIL AVIATION FUND

PURPOSE OF RESOURCES

*development and promotion of the civil aviation
sector and civil airport infrastructures*



Both SAC and FNAC were
established in 2011
(Law nº 12.462/2011)

CAPACITY
X
INVESTMENTS

Investimentos estão
limitados a 4M PAX



*PAN
Schedule*

- Airports classification: **31/05**
- Scenarios – First internal validation: **22/06**
- Scenarios – Established to National Air Planning: **27/07**
- National Air Planning (formal text) - final internal validation: **28/09**
- Sector Seminar (public hearing): **26/10**
- Final version to public presentation: **23/11**
- Technical files (available on SAC website): **28/12**



**— REGIONAL AVIATION —
IMPROVEMENTS PROGRAM**

– REGIONAL AVIATION PROGRAM – MAIN TARGETS

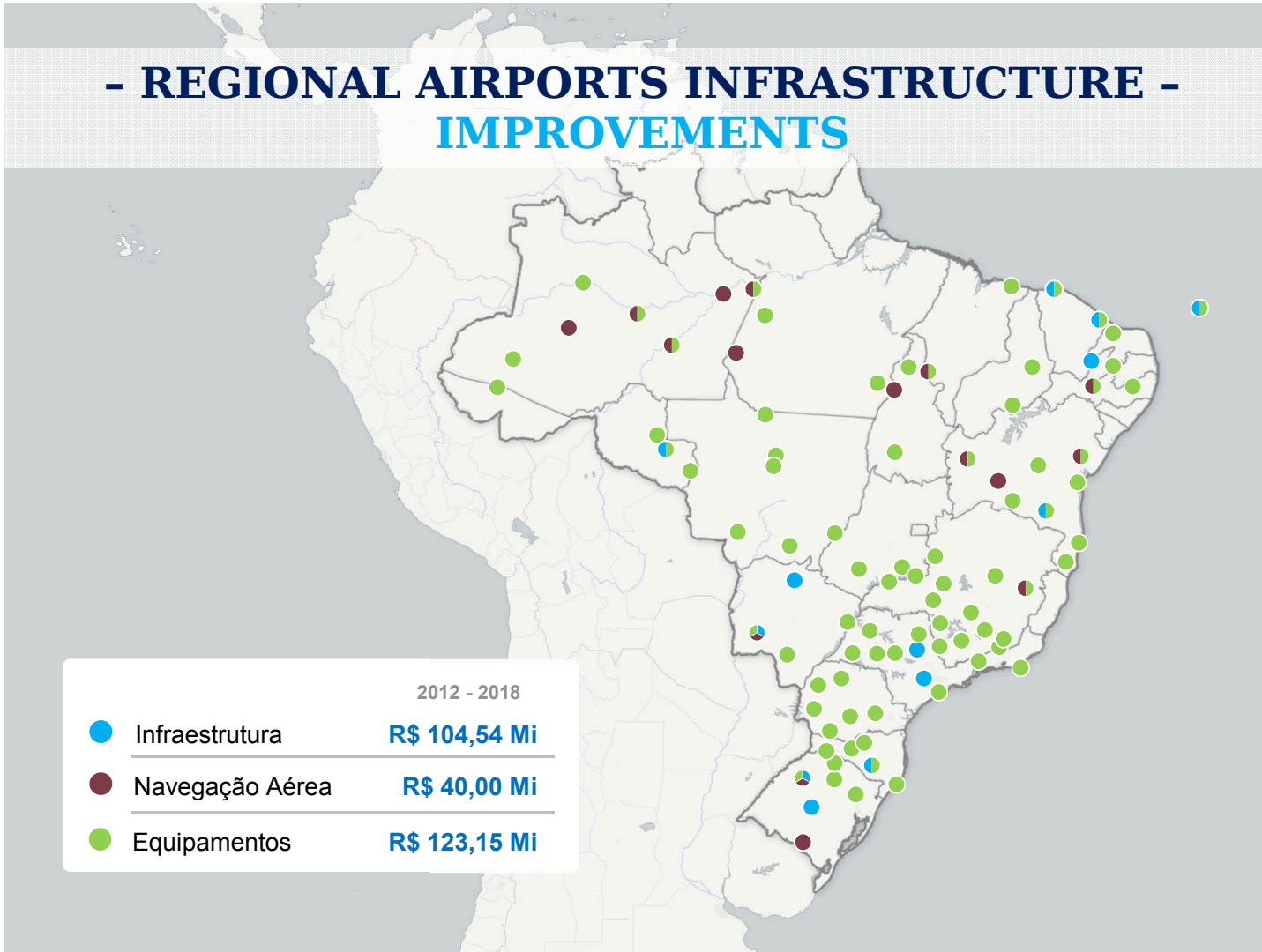
- 1 AIRPORT INFRASTRUCTURE INVESTMENTS**
 - Better terminals and increase passenger processing capacity
 - Increase air side capacity (both dimension and support) – runway, taxiway and apron
- 2 SAFETY & SECURITY BOTTLENECKS**

Firefighting vehicles, Security inspection devices (x-ray and metal detectors) and Operational fence
- 3 INVESTMENTS TO IMPROVE AIR NAVIGATION EQUIPMENT**
- 4 ACCESSIBILITY TO REDUCED MOBILITY PEOPLE**

- REGIONAL AIRPORTS INFRASTRUCTURE - IMPROVEMENTS

2012 - 2018

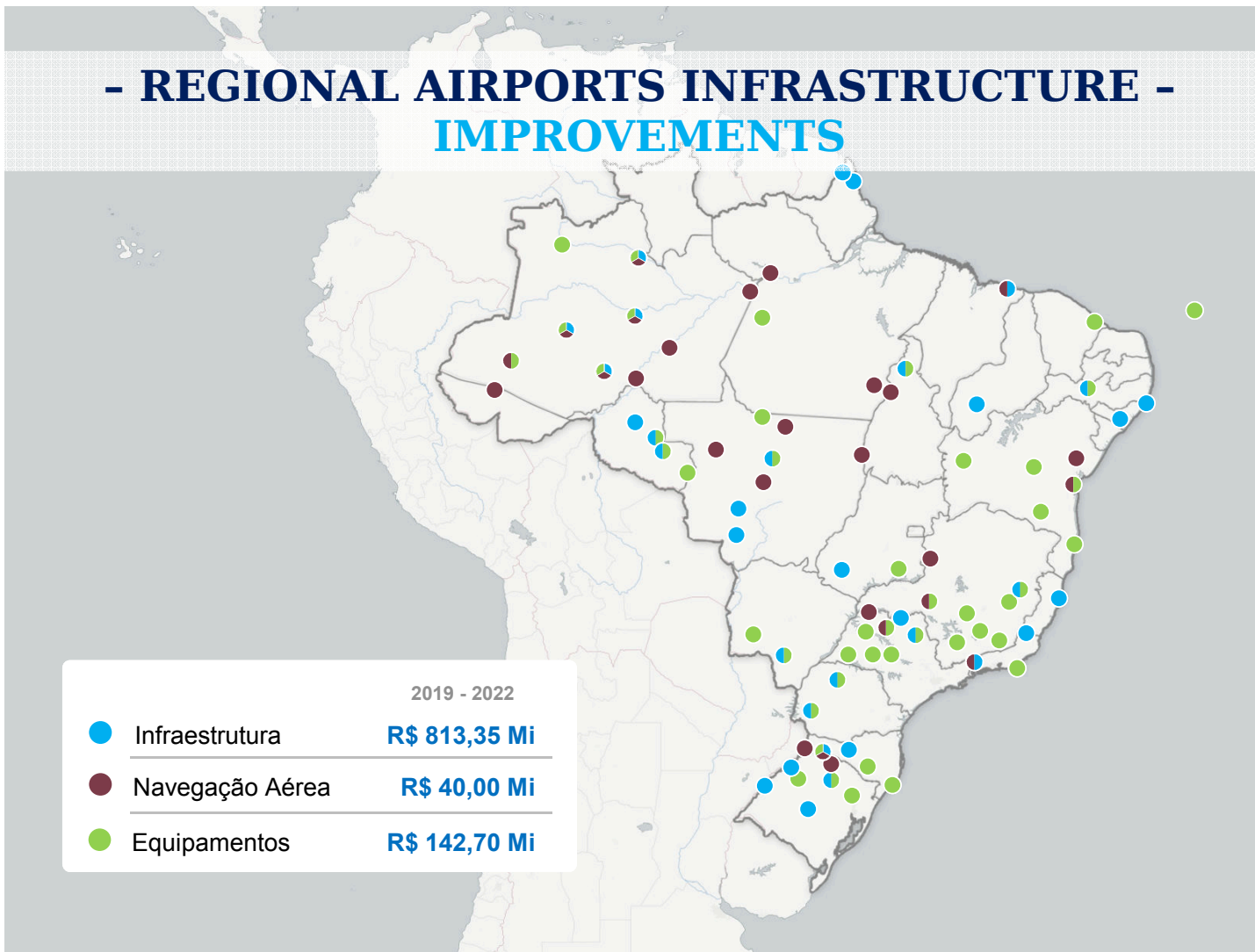
● Infraestrutura	R\$ 104,54 Mi
● Navegação Aérea	R\$ 40,00 Mi
● Equipamentos	R\$ 123,15 Mi



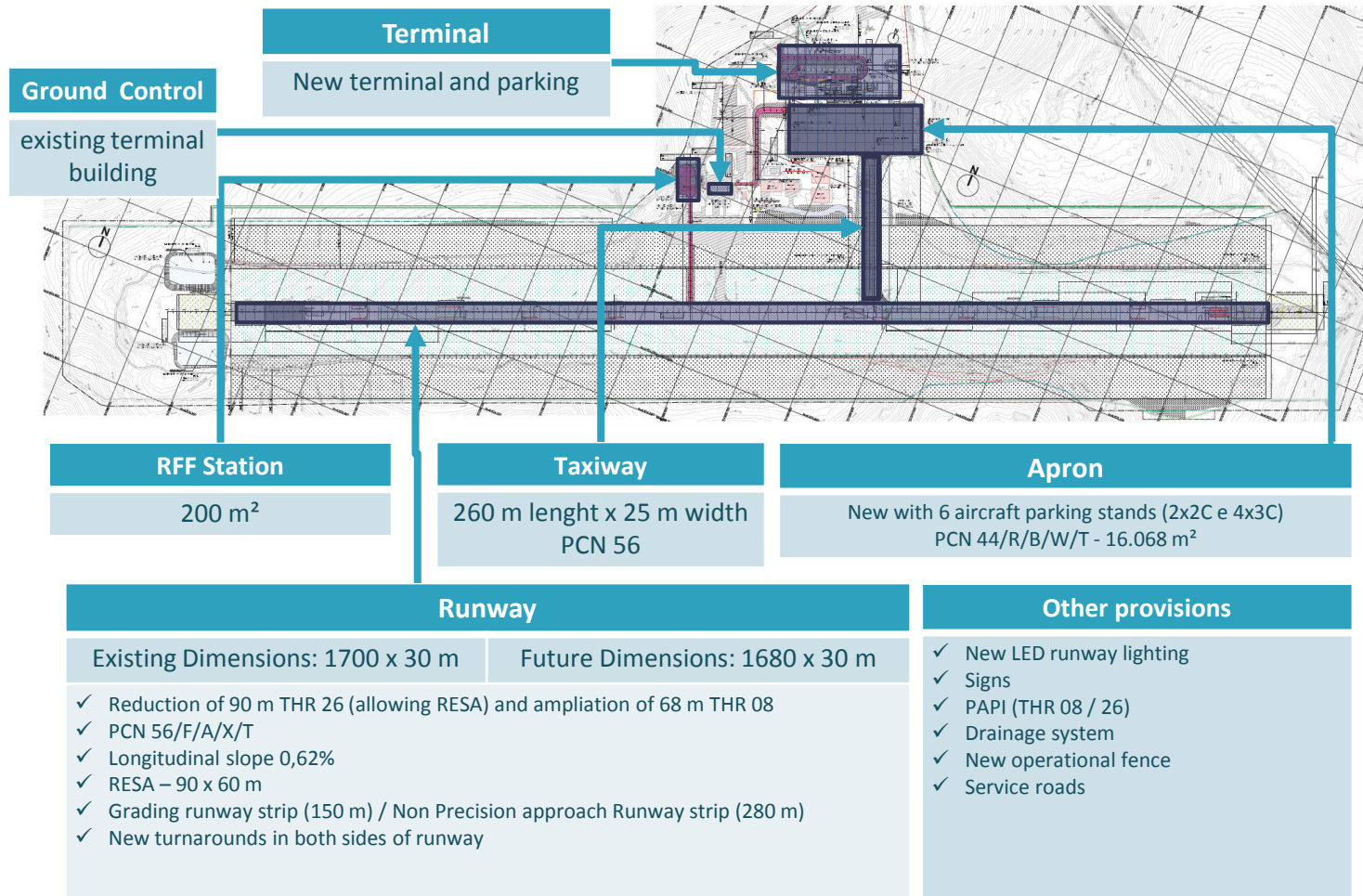
- REGIONAL AIRPORTS INFRASTRUCTURE - IMPROVEMENTS

2019 - 2022

● Infraestrutura	R\$ 813,35 Mi
● Navegação Aérea	R\$ 40,00 Mi
● Equipamentos	R\$ 142,70 Mi



Improvements - Passo Fundo Airport



– REGIONAL AIRPORT INFRASTRUCTURE – BOTTLENECKS (SAFETY & SECURITY)

Operational Fence

Installation and maintenance



X-Ray / Metal Detectors

33 airports



Fire fighting vehicles

89 firetrucks delivered



– REGIONAL AIRPORT INFRASTRUCTURE – ACCESSIBILITY

Buildings

All building designs embracing
Universal Accessibility Requirements



Airside

Av-Ramp at all regional airports with schedule operations



– REGIONAL AVIATION PROGRAM – OPERATIONAL TRAINING

COURSE	STUDENTS
Airport Firefighter and Fire Truck Driver	1042
Airport Managers (Basic)	321
Airport Managers (Intermediate)	129
Aircraf Rescue and Firefighting Management – ARFF	117
Airport Maintenance	79
Airport Operations	47
Ground Assistance	76
Airport Charges (<i>Online</i>)	29
Safety Planning Simulated Exercises – Airport Managers	11
Safety/Security/Operations Planning – Airport Managers	28
Pilot Scholarships	53
TOTAL	1.932
REGIONAL AIRPORTS SERVED:	180

TOTAL INVESTMENT

US\$ 6,4 MM

BETWEEN 2012-2017



**BRAZILIAN MAIN
AIRPORTS
CONCESSIONS X RESULTS**



– AIRPORT – BIG ONES – CONCESSIONS

2011

(ASGA) Natal

2012

(BSB) Brasília

(GRU) Guarulhos

(VCP) Viracopos

2014

(GIG) Galeão

(CNF) Confins

2017

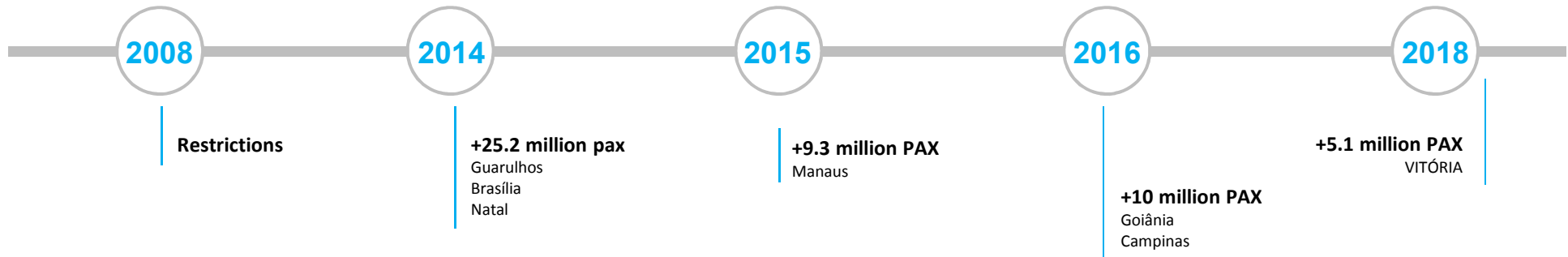
(FLN) Florianópolis

(FLZ) Fortaleza

(SSA) Salvador

(POA) Porto Alegre

- AIRPORT INFRASTRUCTURE - TIMELINE



2014: New Terminal in Guarulhos, Brasília and São Gonçalo do Amarante (Natal)

2015/16: New Terminals in Manaus, Campinas and Goiânia. Increased Brazilian capacity in more 20 million passengers per year

2017/18: New round - Four main airports starting improvements (Fortaleza, Salvador, Porto Alegre, Florianópolis). New Terminal and Apron in Vitória.

– AIRPORT – NEW CONCESSIONS

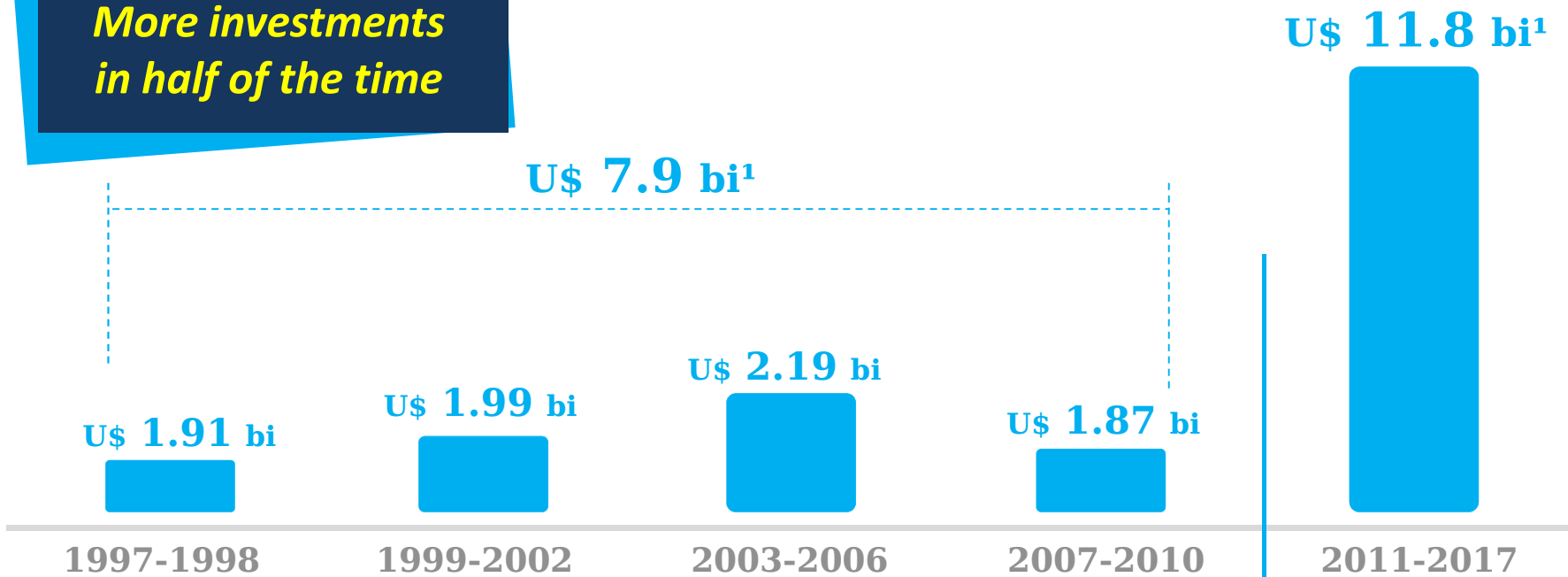


2018 Schedule

- ✓ 1st Quarter - Studies
- ✓ 2nd Quarter - Public Consultation
- ✓ 3rd Quarter - TCU and Notice
- ✓ 4th Quarter - Auction

- THE CIVIL AVIATION POLICY - GREAT RESULTS

**More investments
in half of the time**



2011

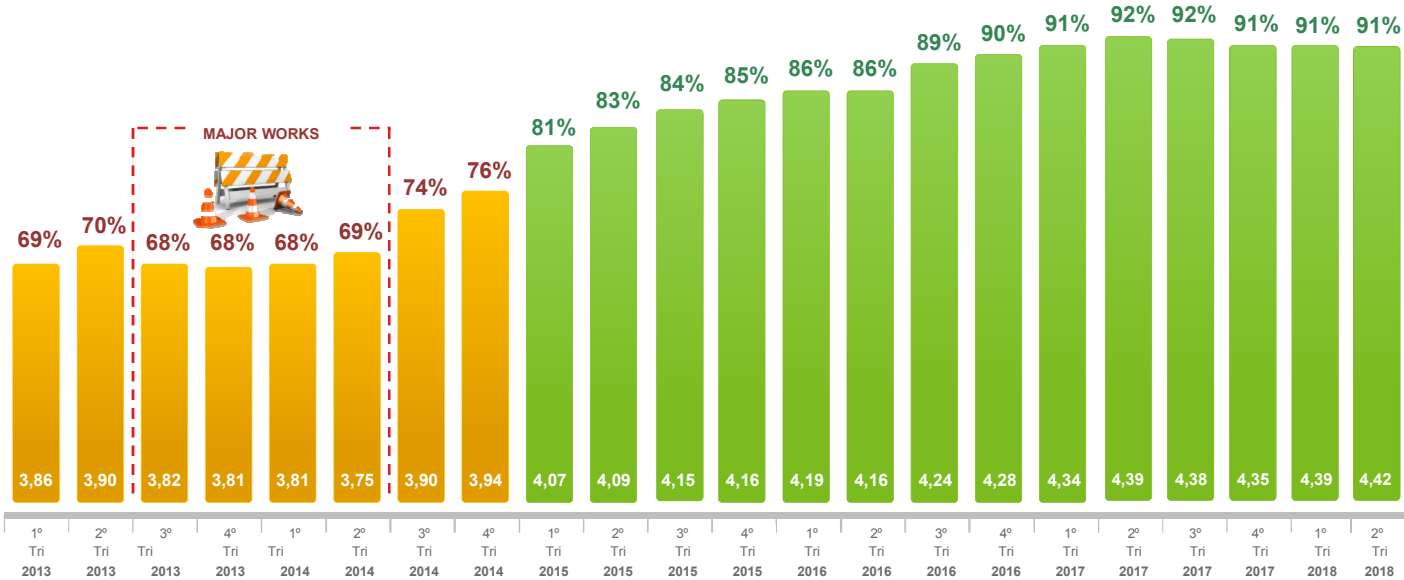
With private investment

¹ values updated by Brazilian inflation and the quotation of the dollar of the period.

- PASSENGER - SATISFACTION SURVEY

Passenger satisfaction growth per quarter and average grade

(Percent of 4 and 5 in 1 to 5 range grades)



- MORE INFORMATION ABOUT BRAZILIAN CIVIL AVIATION -
WWW.TRANSPORTES.GOV.BR/HORUS



MOVEMENT

Performance, ranking, evolution and comparison



HOTRAN

Graphs, indicators and infographic on authorized flights and routes



OPERATIONAL PERFORMANCE

Passenger satisfaction survey through graphics and infographics

AIRPORT AND MAP

Data of each aerodrome, such as cadastral information, indicators of operation, infrastructure and location





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