

Impact of implementations in the Region

Marco Vidal

Assistant Director, The Americas



Agenda

- **Operations Overview + ASBU + ANP**
- **Industry Impact & Forecast**
- **Future Growth**
- **Challenges & Opportunities**
- **Q&A**

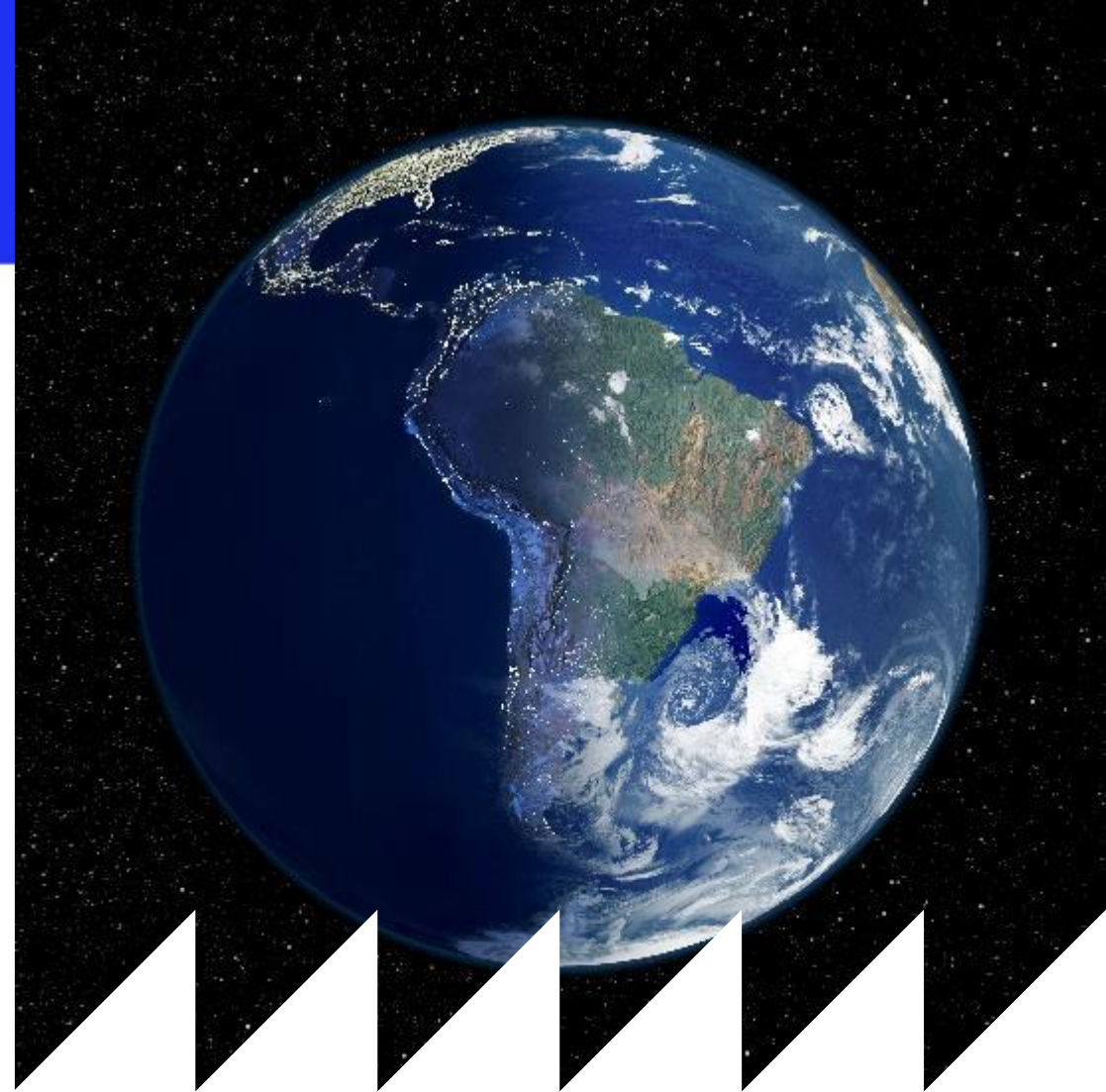


ASBU wish list for airlines?

- RNP ARs across the region?
- Most direct routes?
- ADS-B?
- Something else?

ASBUs – Enablers to Operational Improvement

- Airlines do not need or want you to implement ASBUs [including PBN]...
- **UNLESS** the results
 - ... have achievable operational benefits
 - ... that deliver tangible cost offsets



MTC – MFT – MTT

ROUTE	MFT/R	MCT/R	MTT/R
OFF NO	7	8	9
FIN NO	327	327	327
FLT TIME	07:56	08:03	07:56
ETA	17:07	17:14	17:07
CRUISE	CI45	CI45	CI45
SAVINGS			
COSTS	24152	23228	24152
BURN OFF	84591	86012	84591
ALTN	KPBI	KPBI	KPBI
ALTNFUEL	3255	3255	3255
RESERVE	48	48	48
CONT			
ADD FUEL			
T/O FUEL	99526	101059	99526
EXTRA			
TTL FUEL	100496	102029	100496
LOAD	100000	100000	100000
MALTOW	408000	390741	408000
PLNTOW	380526	382059	380526
MALLW	326000	326000	326000
PLNLW	295935	296047	295935
MAXZFW	312300	312300	312300
PLNZFW	281000	281000	281000
ESTZFW	281000	281000	281000
DIST	3521	3602	3521
AVG WC	M010	M006	M010
MAX FL			



- Correct Cost Index usage
- Assign the expected SID / STAR / Approach for accurate fuel planning
- Planning according to a CDM plan to approach Flight Planning to Execution

**Why?
What else?**



Industry Impact & Forecast



1 ACFT several airspaces/airports

Beside lack of Interoperability & Harmonization.....



Every day in the airline industry...



BASED ON 2018 DATA



12

Million
passengers



104,400

Flights



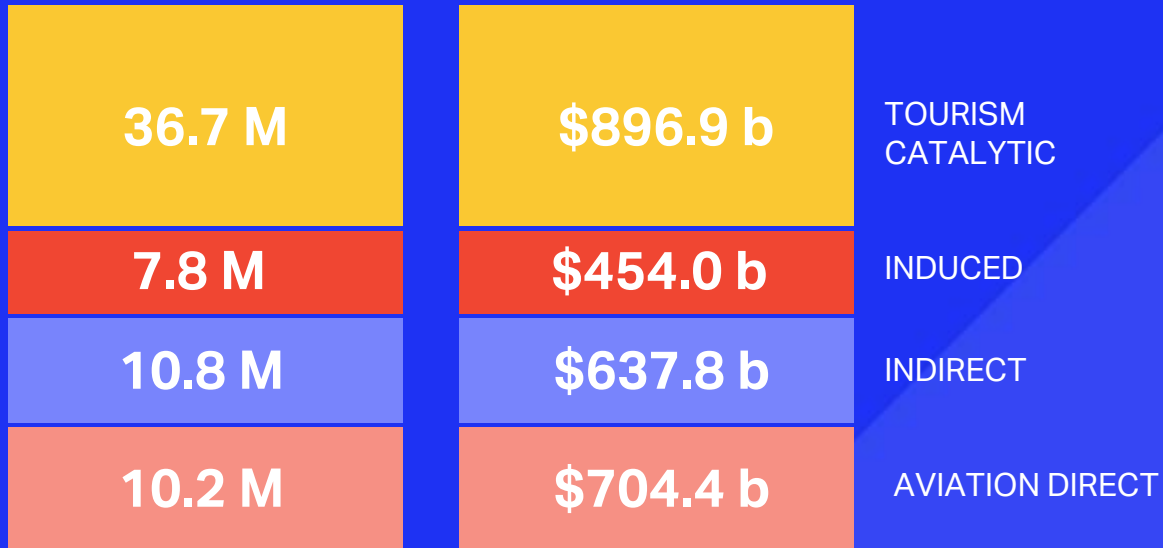
\$18.2

Billion worth of goods
carried

The global air transport industry

65.5 million

\$2.7 trillion



JOBS



GDP

Aviation's global employment and GDP impact



65.5 million

Jobs supported by aviation worldwide



\$2.7 trillion

Aviation's global economic impact (including direct, indirect, induced and tourism catalytic)



3.6%

Global GDP supported by aviation

In North America...

AIR TRANSPORT SUPPORTS...



7.3
million jobs



\$844
billion of GDP



In Latin America & the Caribbean...

AIR TRANSPORT SUPPORTS...



7.2
million jobs



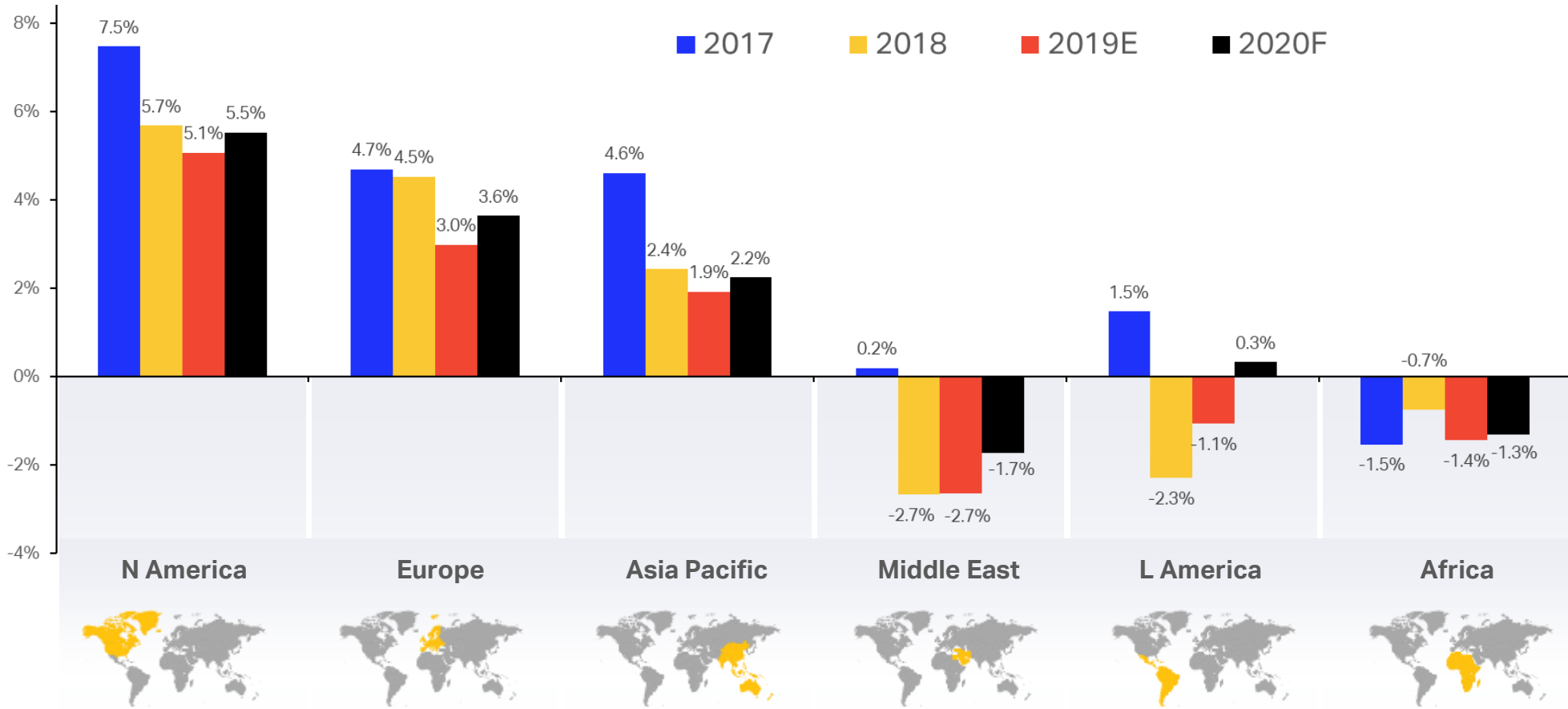
\$156
billion of GDP



Regional profitability remains very uneven



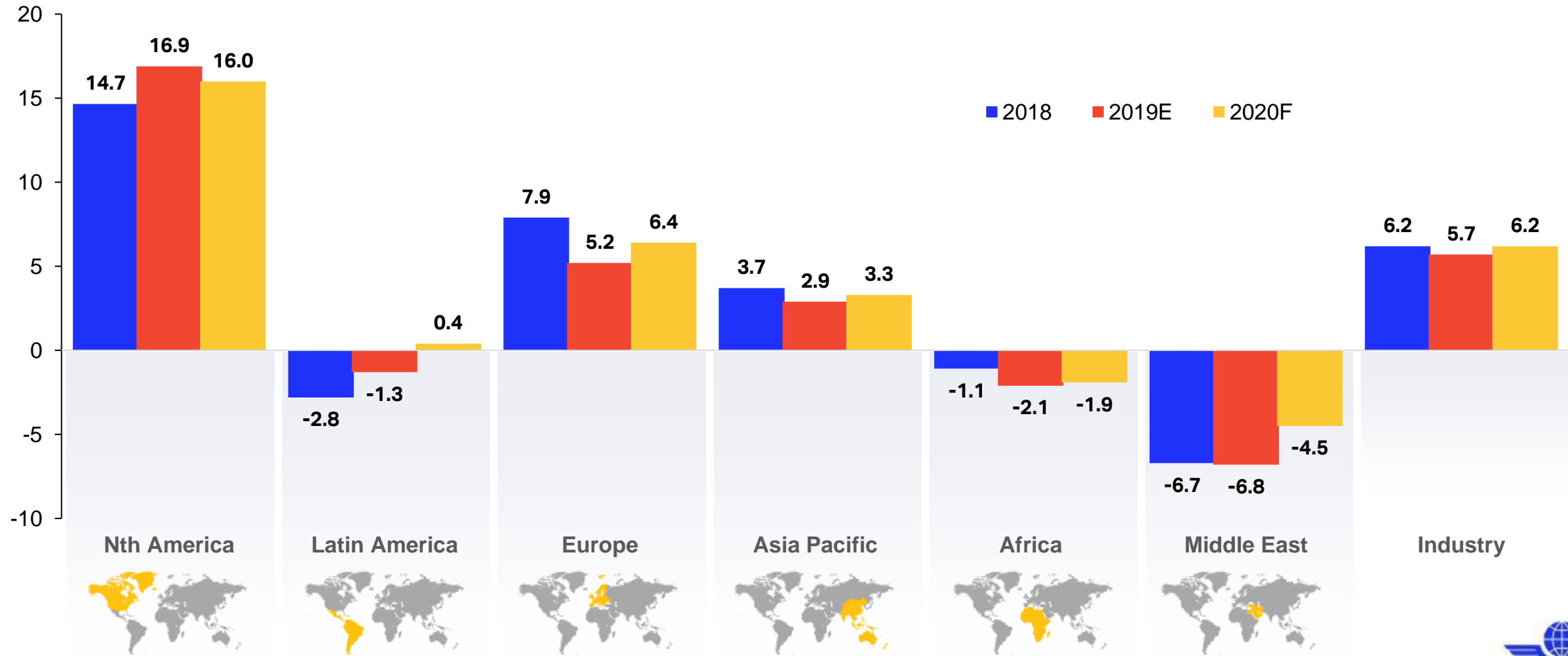
NET POST-TAX PROFIT MARGINS



Per passenger (net) profit shows wide regional variation



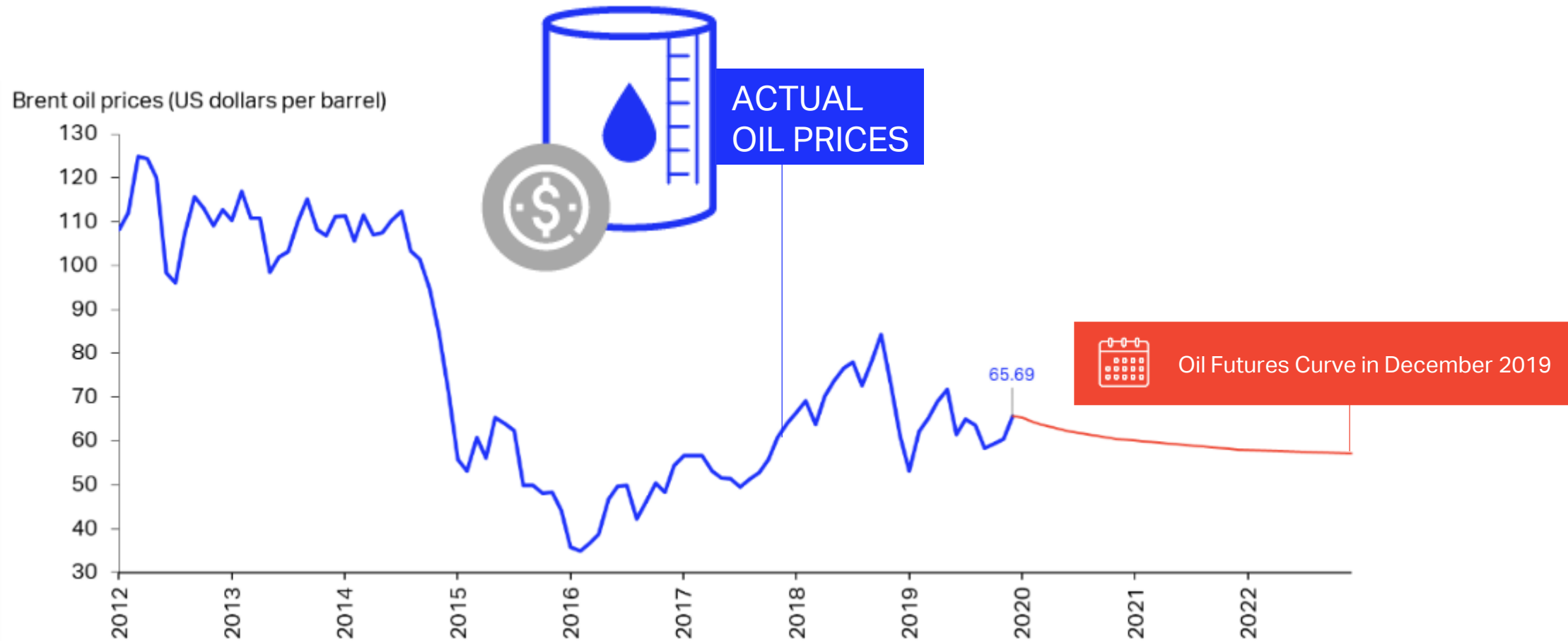
PROFIT PER PASSENGER (US\$)



Future Growth



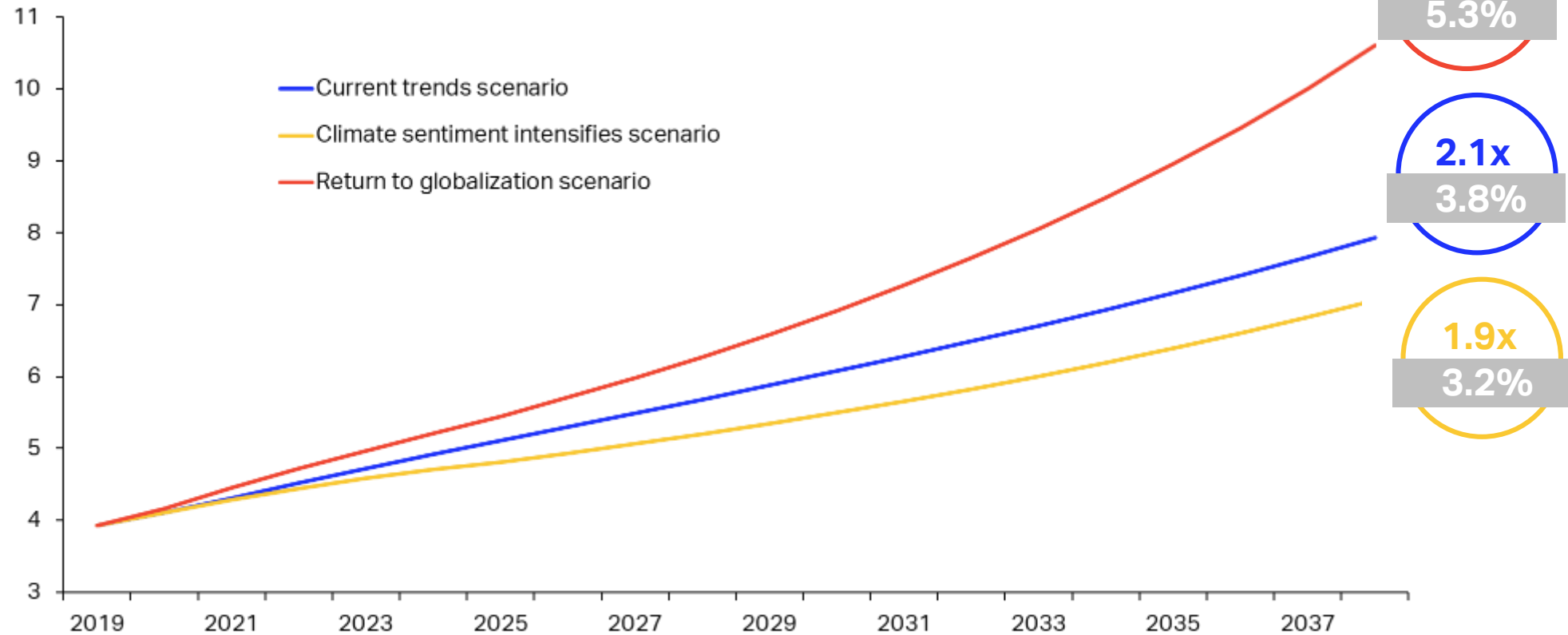
Oil prices are expected to ease somewhat



Demand for air travel to double over the next 20 years



Passenger departures
(billion, O-D basis)



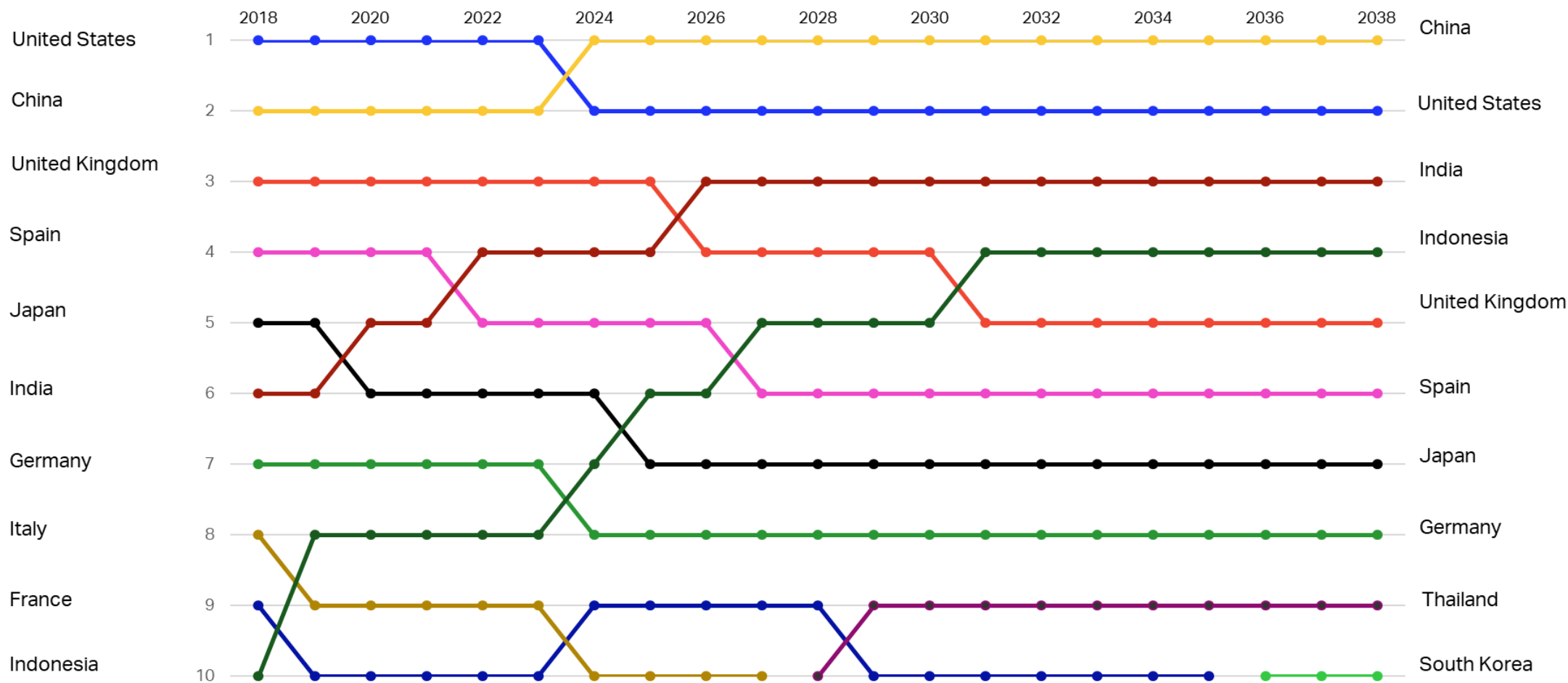
Top 10 int'l air pax markets 2018-38



Ranking based on the number of passenger journeys to, from and within each market



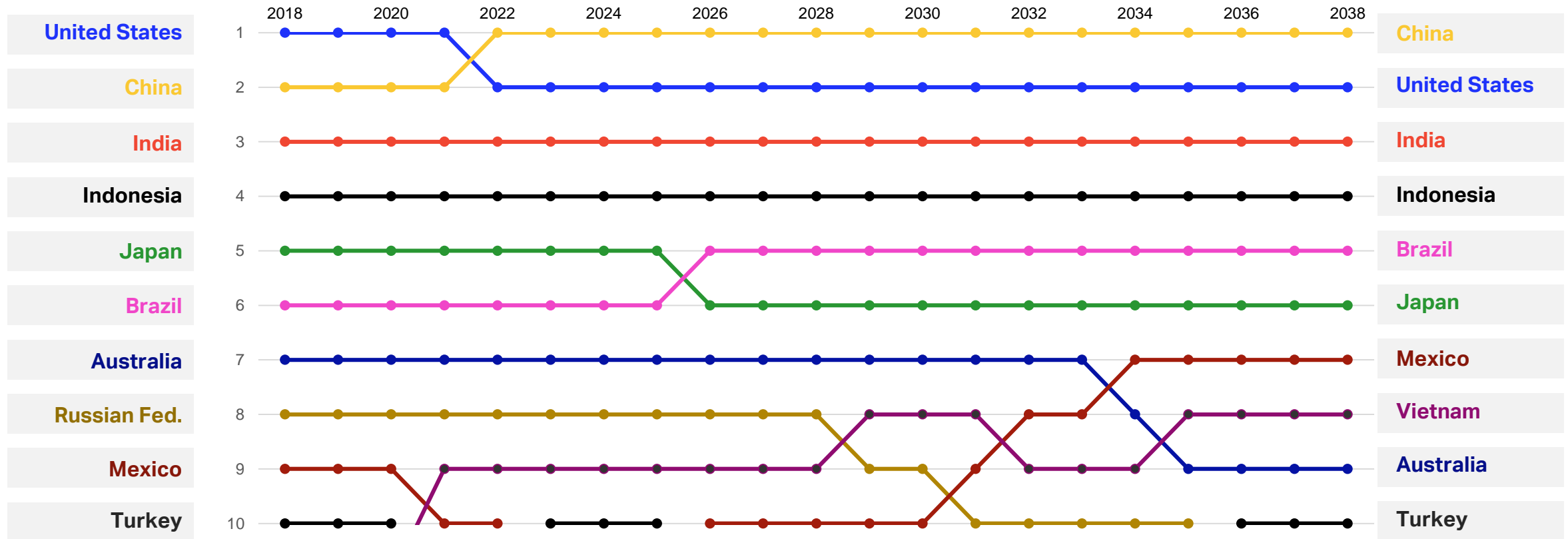
Top International Passenger Markets, ranked by Passenger Numbers



Top 10 domestic air pax markets 2018-38



Top domestic passenger markets, ranked by **passenger numbers**



Challenges & Opportunities



CUT HERE IN EMERGENCY



Regional Priorities

INFRASTRUCTURE



Capacity Constraints
Slots
Airspace
Optimization

TAXES & CHARGES



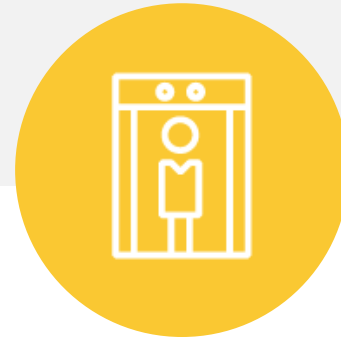
Cash Cow Industry
High Cost
Lack of Transparency

SMARTER REGULATIONS



Politically Motivated
Global Standards
Environment
Sustainability

SAFETY & SECURITY



#1 Industry Priority
Security Risks
Regional Plan

DISTRIBUTION



BSP
Fraud Concerns
NDC/ Agents

Country Challenges



INFRASTRUCTURE PROJECTS



TAXATION & CHARGES



REGULATORY HARMONIZATION

Environmental Sustainability in the Americas

Flight Shaming Movement Coming to the Americas

B Berkeleyside

Please don't fly in 2020: From Sweden to Berkeley, the 'flight shaming' movement takes off

The Swedish no-fly movement now has an American counterpart based in Berkeley. Air travel is a major contributor to global warming, and the ...
2 days ago



BBC News

Why 'flight shame' is making people swap planes for trains

The flight shame movement is about feeling accountable for your carbon footprint - but it is also about rediscovering the joy of slow travel, writes ...
1 month ago



N The Nation

Enough With the Flight Shaming, Already!

In 2016, Malena Emman, an internationally known mezzo-soprano from Sweden, put her career on hold. She was concerned about the ...
1 week ago



Thomson Reuters Foundation

Flight shaming hits air travel as 'Greta effect' takes off

A survey shows one in five travellers is flying less as ...
2 weeks ago



Aviation industry's proactive stance

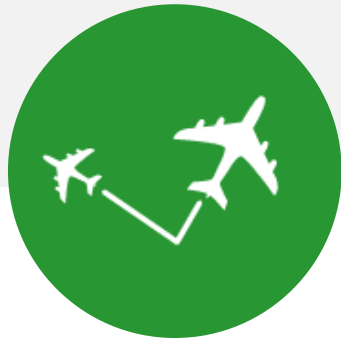
- ▶ Climate change is one of the fundamental challenges of our time.
- ▶ The aviation industry has united to reduce its impact upon the climate, in line with the Paris agreement.
- ▶ Under **CORSIA**, the first global sector-specific climate program, the aviation industry will spend over **\$40 billion on projects that cap the climate impact of flying.**
- ▶ By June 2019, more than **180,000 commercial flights using SAF** have been performed.

Efficiency improvements

Technology



ATM



IATA Liaison
Desk



Airports



Sustainable
Aviation Fuels



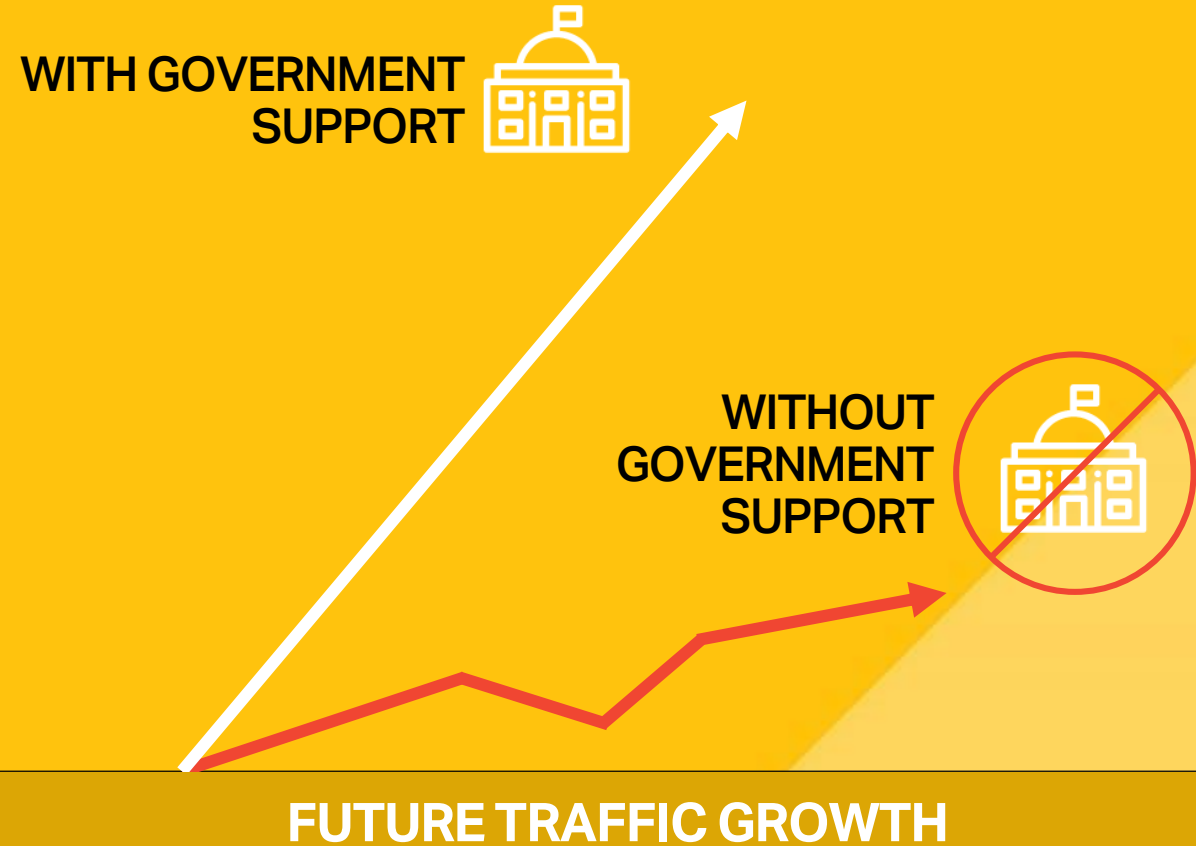
50%



A flight you take today produces 50% less CO2 than the same flight in 1990.

Overall government support needed

- ▶ **Efficient infrastructure and services**
- ▶ **Passenger rights & smarter regulation**
- ▶ **Competitive taxes & charges**
- ▶ **Harmonized regulatory framework**



Q&A



Thank you

Marco Vidal

Assistant Director, The Americas

vidalm@iata.org

www.iata.org

