



CLAC/A24-NE/08
24/03/22

XXIV ASAMBLEA ORDINARIA DE LA CLAC
(Montevideo, Uruguay, 23 al 25 de marzo de 2022)

Cuestión 11 del
Orden del Día: Exposición sobre “Estadísticas de la Región”.

Presentación sobre estadísticas en la región

(Nota de Estudio presentada por - ALTA)

1. Se adjunta la presentación de ALTA.

Medidas propuestas

2. Tomar nota de la información presentada.



CLAC/A24-NE/08
ADJUNTO
24/03/22

Latin American and the Caribbean Air Transport Overview

José Ricardo Botelho, CEO ALTA
Latin American and Caribbean Air Transport Association
(ALTA)

LAC economies had a positive recovery in 2021



	GDP	
	Estimate	
	2020	2021
World Output	-3.1	5.9
Advanced Economies	-4.5	5.0
United States	-3.4	5.6
Euro Area	-6.4	5.2
Emerging Market and Developing Economies	-2.0	6.5
Latin America and the Caribbean	-6.0	6.8

Source: IMF, World Economic Outlook,
January 2022 Update. RPK: IATA y ALTA

However, this was not reflected in air transport

	GDP		RPK	
	2020	2021	2020	2021
		Estimate		
World	-3.1	5.9	-69.7%	81.2%
Advanced Economies	-4.5	5.0		
United States	-3.4	5.6		
Euro Area	-6.4	5.2		
Emerging Market and Developing Economies	-2.0	6.5		
Latin America and the Caribbean	-6.0	6.8	-59.7%	36.7%

Source: IMF, World Economic Outlook, January 2022
Update RPK: IATA y ALTA

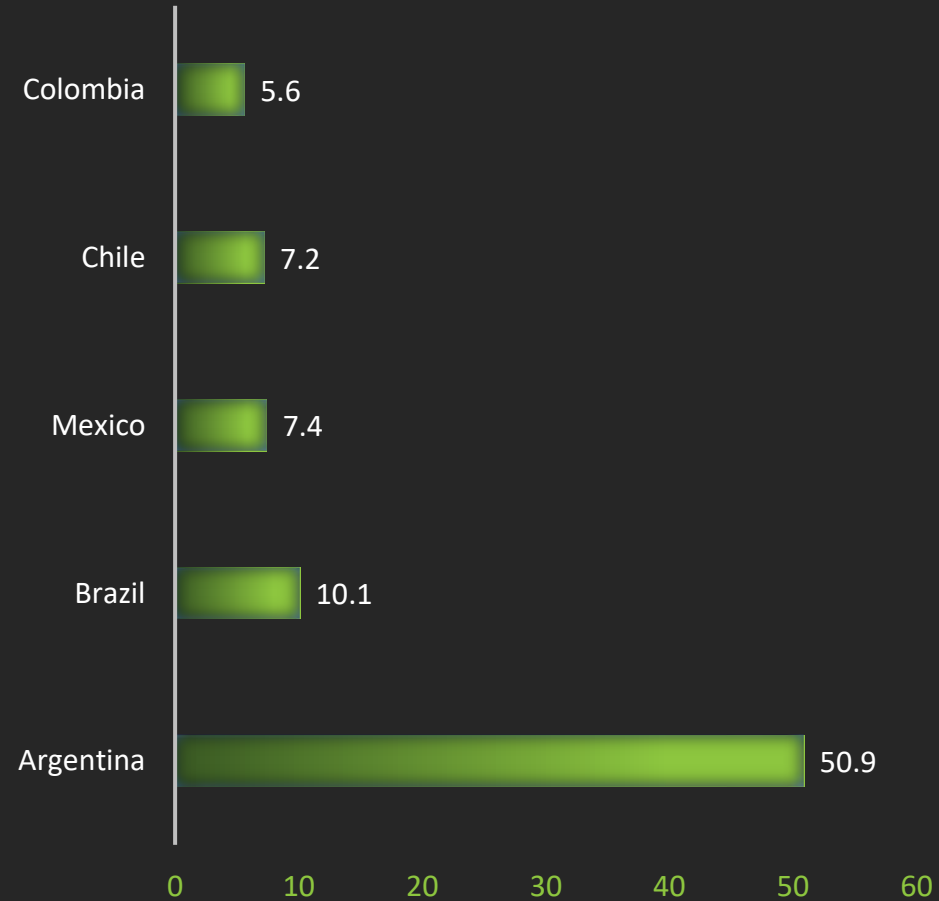
The open border policy has a strong impact on air transport, even if there is no clear relation between new cases and travel restrictions

ALTA Openess Index (March 22, 2022)

	Covid test	Entry Restriction	Flight suspended	Quarantine	March 22, 2022	feb-22	oct-21	sep-21	ago-21
Mexico	No	No	No	No	100	100	100	100	100
Costa Rica	No	No	No	No	100	100	100	85	85
Salvador	No	No	No	No	100	100	90	90	90
Colombia	No, if vaccinated	No	No	No	95	95	100	100	100
Honduras	No, if vaccinated	No	No	No	95	95	90	85	85
Ecuador	No, if vaccinated	No	No	Risk of quaretine	92	92	85	85	85
Nicaragua	Yes	No	No	No	90	90	90	90	90
Haiti	Yes	No	No	No	90	90	90	90	90
Guatemala	Yes	No	No	No	90	30	20	20	20
Republica Dominicana	Yes	No	No	No, with exceptions	88	88	88	88	88
Brazil	Yes	No	No	No, with exceptions	88	88	88	50	50
Panama	Yes	No	No, with exceptions	Yes, with exception	88	85	85	85	85
Peru	No, if vaccinated	No	NO, with exceptions	Risk of quaretine	60	40	30	30	30
Cuba	Yes	No	No	yes, for unvaccinated	40	40	40	40	40
Venezuela	Yes	No	Yes, with exception	Yes, for arilines crew	35	35	38	20	20
Argentina	Yes, not apply for neighbouring countries,	No	No	Yes, for unvaccinated. Risk of quarentine	35	30	20	20	20
Bolivia	Yes	No	No	Yes, for unvaccinated	30	30	20	20	20
Chile	Yes	Yes, with exceptio	No	Yes	20	20	20	20	20
Uruguay	Yes	Yes	No	Yes	20	20	20	20	20

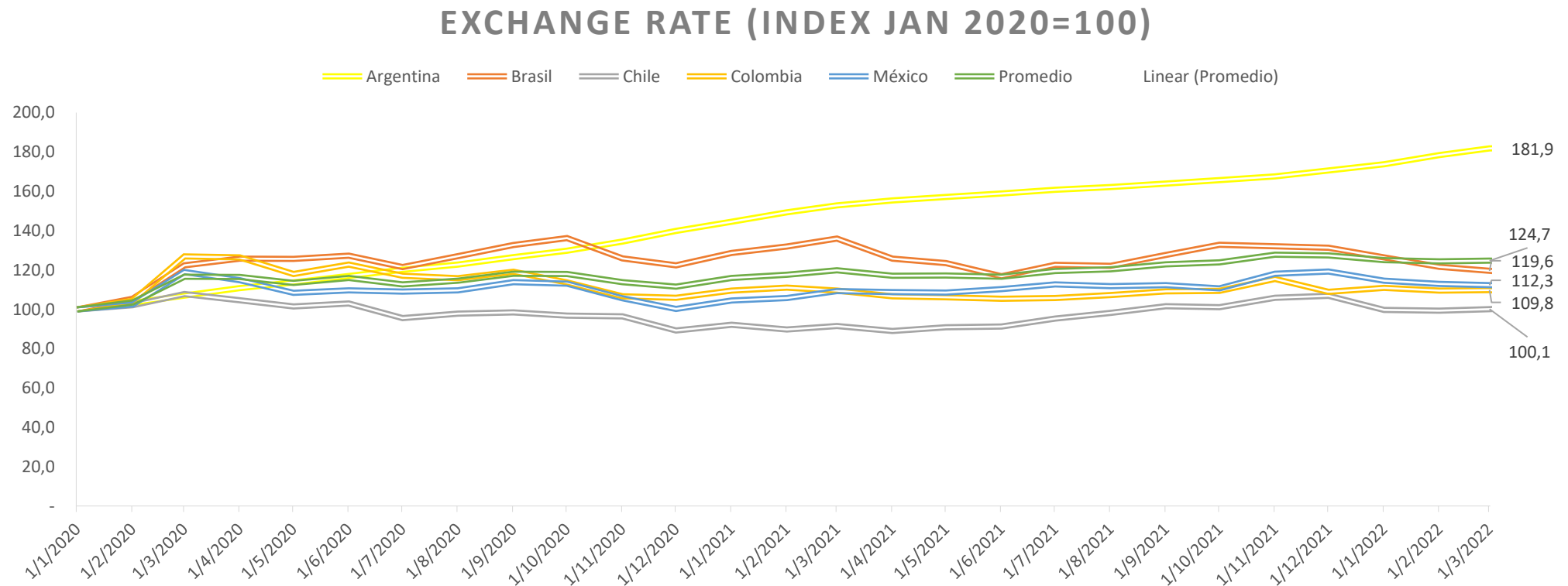
Our region is facing widespread inflation

IPC, DIC 2021



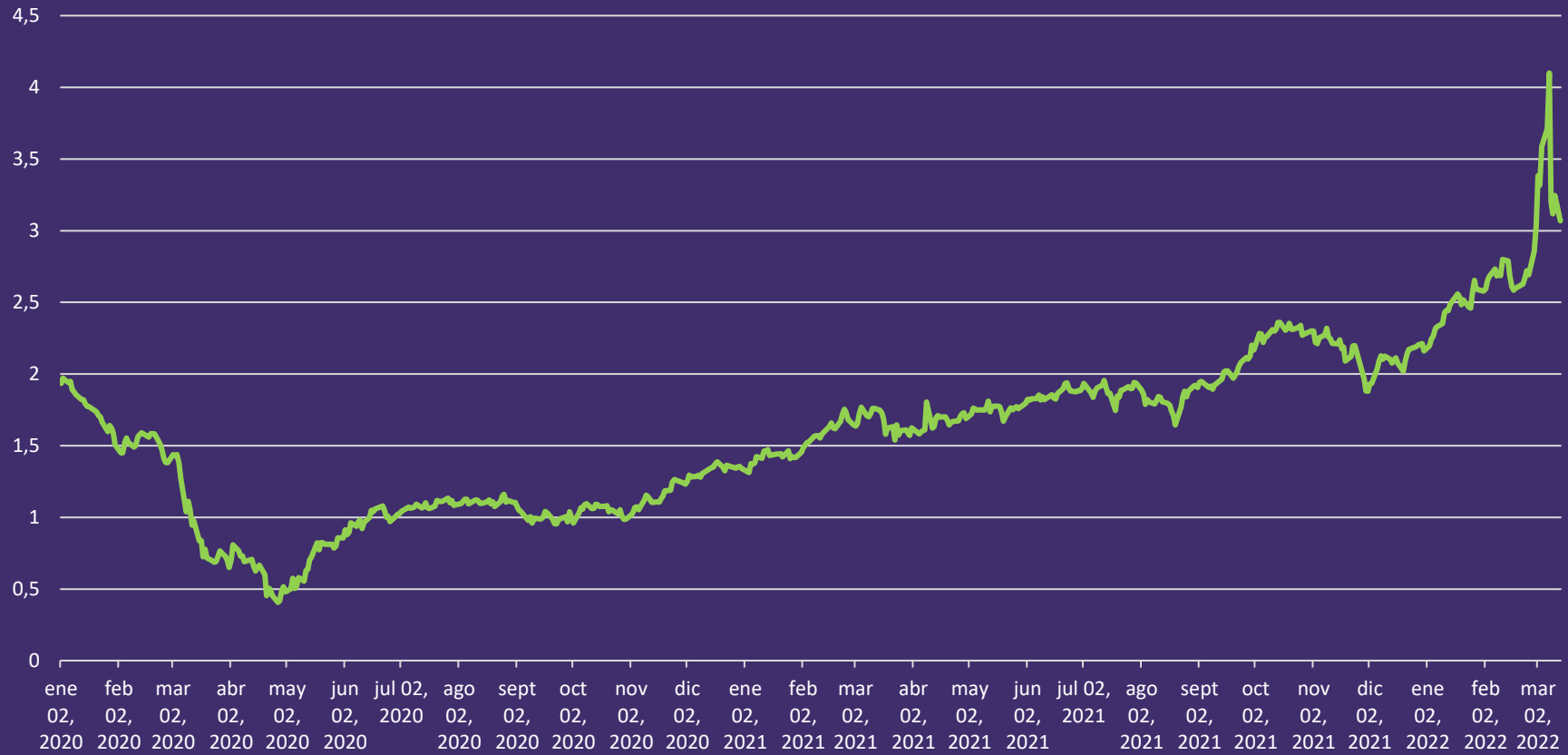
- ▶ Omicron
- ▶ Disruption in the supply chain
- ▶ Geopolitical reasons
- ▶ Climate

The exchange rate impacts the sector, international flights are dollarized...



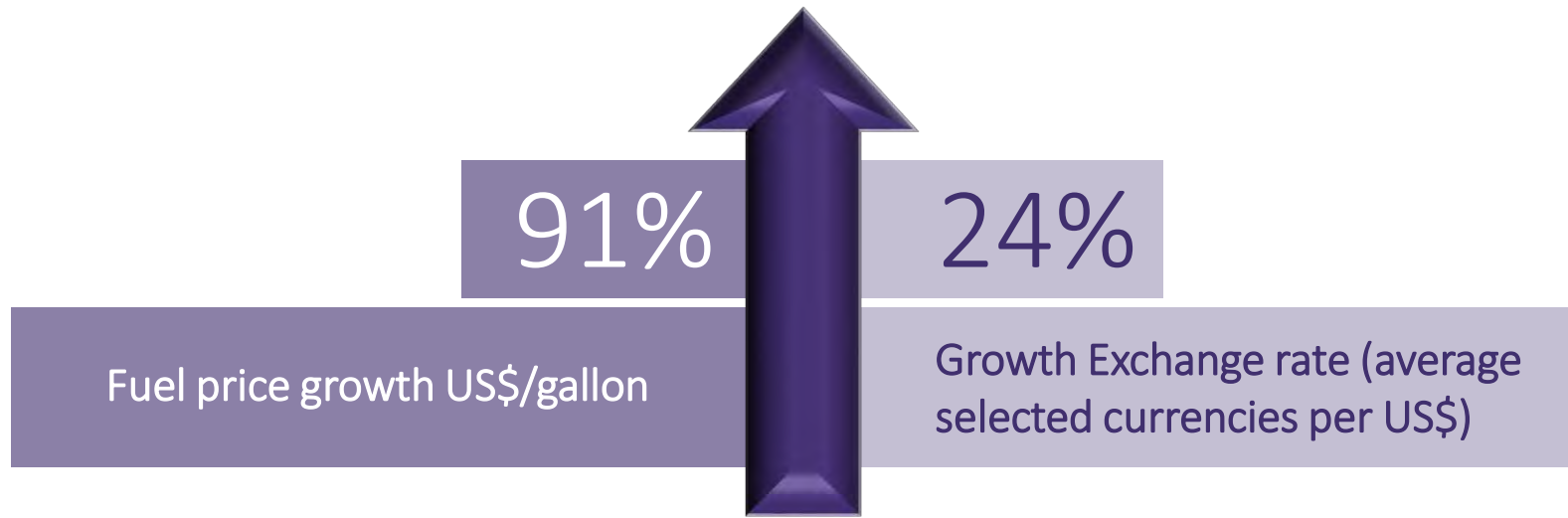
The input with the greatest weight in the cost structure has historically high prices

U.S. Gulf Coast Kerosene-Type Jet Fuel Spot Price FOB (Dollars per Gallon)

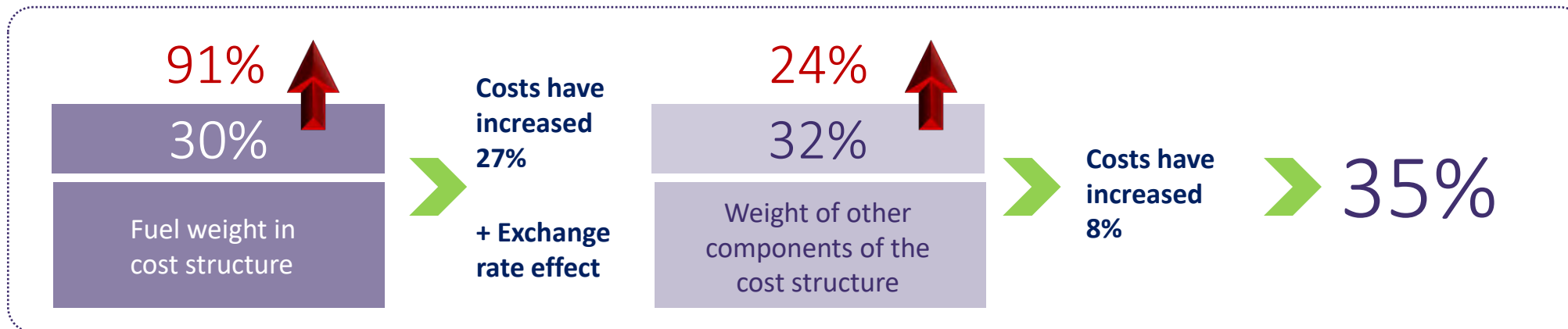


91%
(Jan 2020
vs March
2022)

Effect of fuel and exchange rate



Net effect on cost structure



Signs that we are getting closer to normal...

INTERNACIONAL Febrero 17 De 2022 - 04:36 P.M.

Primer ministro israelí anuncia el fin del pase sanitario por covid-19

Israel fue uno de los primeros países en lanzar una campaña de vacunación, en diciembre de 2020, tras un acuerdo con la farmacéutica Pfizer.

Facebook
Twitter
Linked In
Enviar
GUARDAR

UP TO 70% OFF



Naftali Bennett, primer ministro de Israel.
ATEF SAFADI. EFE

MÁS CONTENIDO

En 2021, más de 227 mil familias se volvieron propietarias de vivienda

El año pasado, cada 2 minutos y medio, una familia colombiana cumplió el sueño de comprar su vivienda propia.



Lo más leído

1. El 95% de planta administrativos de Bancolombia inicia trabajo híbrido

VIAJANDO Colombia

DESTINOS TIPS COLOMBIA ESCAPADAS EXPERIENCIAS HOTELES CORPORATE VER MÁS Seguirnos

UNA FORMA MÁS SEGURA DE VIAJAR.
Hemos elevado los estándares recomendados por la CDC y OMS para mantenerse seguro y tranquilo. Cuando esté listo para volar, sabrá que estamos listos para cuidar de usted.

DELTA | SIN MASCARILLA | RESERVA MÁS >

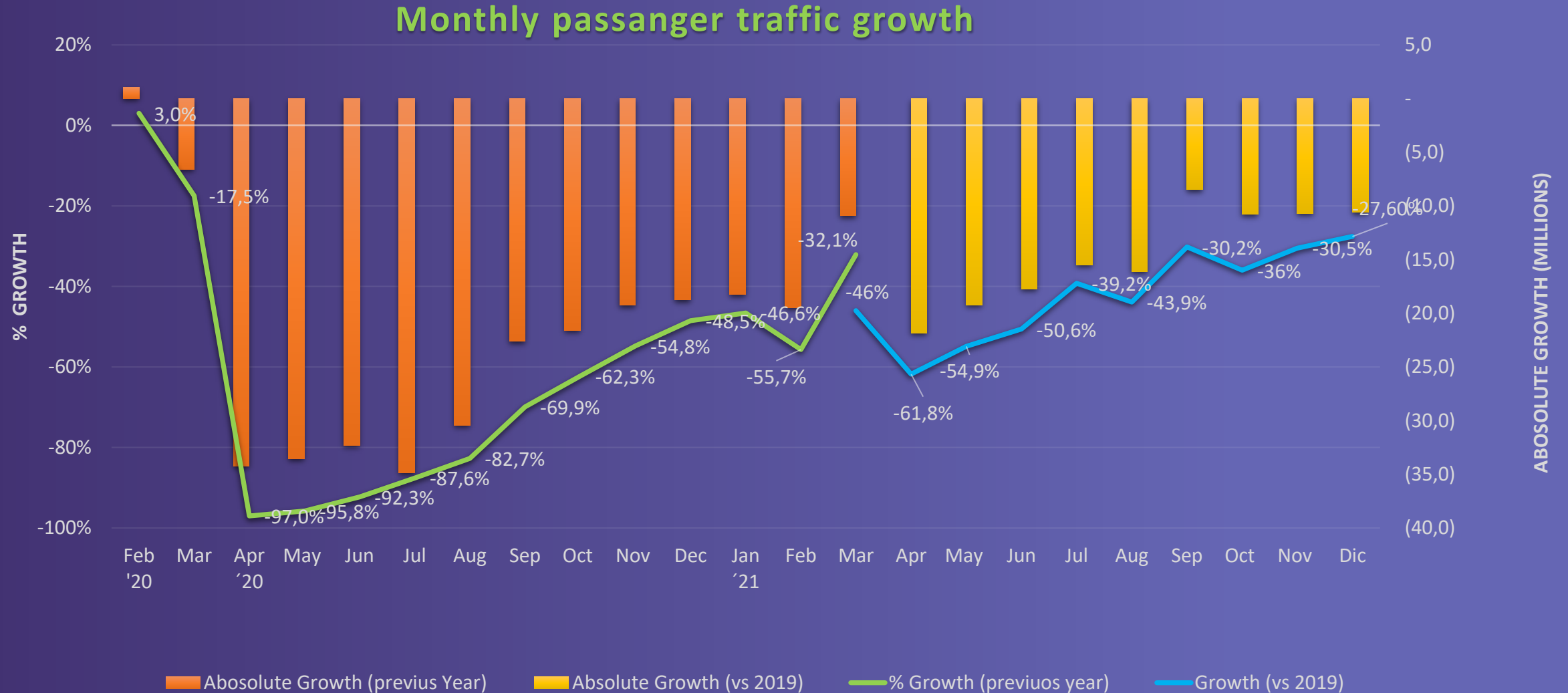
f FLEXIBILIZACIÓN

Walt Disney World: el uso de mascarillas no es obligatorio

Walt Disney World Resort anunció que ya no es obligatorio el uso de mascarillas en personas vacunadas dentro de los parques. Conoce las excepciones que aplican.

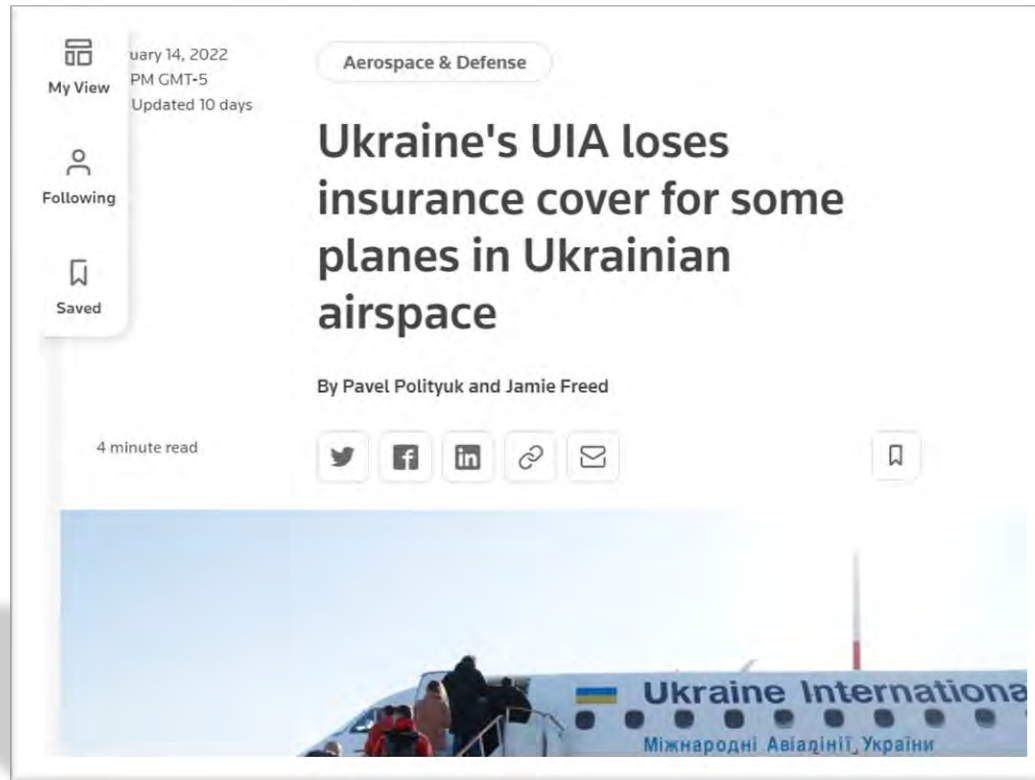
16 DE FEBRERO DE 2022

Expectations are buoyed by recovery.....although we are still ¾ below 2019 levels



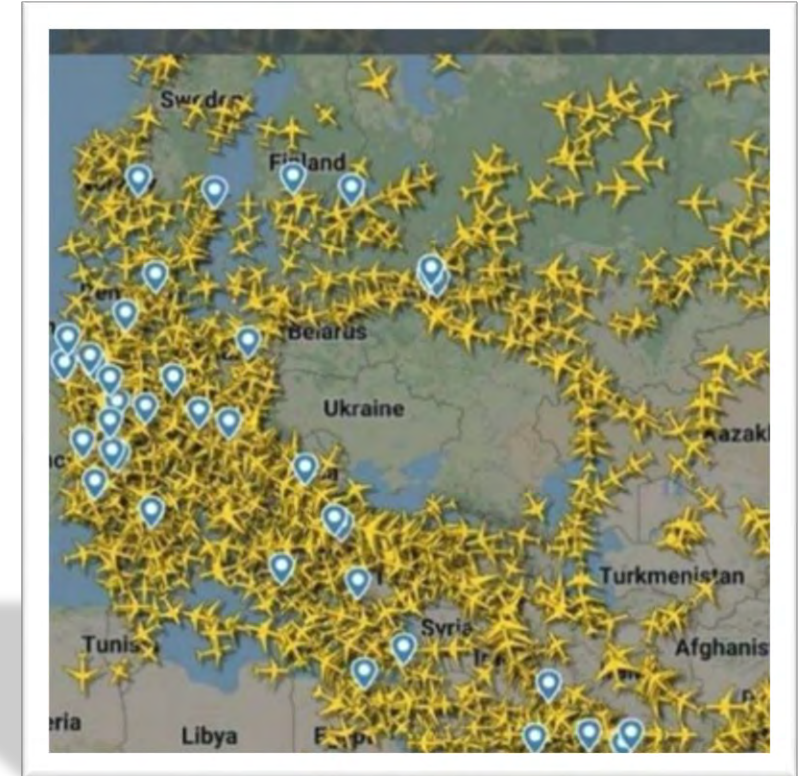
	December			Growth		Year (January-December)			Growth	
	2019	2020	2021	2020/2019	2021/2019	2019	2020	2021	2020/2019	2021/2019
PAX	38.705.589	19.928.715	28.018.919	-48.5%	-27.6%	434.083.264	177.299.730	218.596.781	-59.2%	-49.6%
Domestic	21.862.820	12.700.682	19.845.421	-41.9%	-9.2%	242.222.445	109.077.591	159.664.227	-55.0%	-34.1%
Intra-LAC	4.487.821	1.160.564	2.496.977	-74.1%	-44.4%	51.771.728	14.723.685	16.026.193	-71.6%	-69.0%
Extra-LAC	12.354.948	6.067.469	5.676.521	-50.9%	-54.1%	140.089.092	53.498.455	42.906.361	-61.8%	-69.4%
RPK (millions)	82.077	36.393	64.656	-55.7%	-21.2%	914.849	348.888	350.464	-61.9%	-61.7%
Domestic	19.847	12.850	19.094	-35.3%	-3.8%	217.032	105.618	153.929	-51.3%	-29.1%
Intra-LAC	8.496	2.096	4.822	-75.3%	-43.2%	100.322	27.763	29.682	-72.3%	-70.4%
Extra-LAC	53.734	21.447	40.313	-60.1%	-25.0%	597.495	215.507	166.302	-63.9%	-72.2%
ASK (millions)	100.583	51.200	78.886	-49.1%	-21.6%	1.105.690	489.478	479.919	-55.7%	-56.6%
Domestic	23.729	16.060	23.296	-32.3%	-1.8%	262.765	141.511	204.877	-46.1%	-22.0%
Intra-LAC	10.662	2.972	5.793	-72.1%	-45.7%	122.563	39.215	41.030	-68.0%	-66.5%
Extra-LAC	66.192	32.168	49.798	-51.4%	-24.8%	720.363	308.752	234.011	-57.1%	-67.5%
Load Factor	81,6%	71,1%	81,8%	-10.5 pts	0.2 pts	82,7%	71,3%	73,0%	-11.4 pts	-9.7 pts
Domestic	83,6%	80,0%	82,0%	-3.6 pts	-1.6 pts	82,6%	74,6%	75,1%	-8 pts	-7.5 pts
Intra-LAC	79,7%	70,5%	83,2%	-9.2 pts	3.5 pts	81,9%	70,8%	72,3%	-11.1 pts	-9.6 pts
Extra-LAC	81,2%	66,7%	81,0%	-14.5 pts	-0.2 pts	82,9%	69,8%	71,1%	-13.1 pts	-11.8 pts

Rusia-Ukraine



(A0576/22 NOTAMN
Q) UKXX/QAFXX/IV/NBO/E /000/999/4748N03112E999
A) UKBV UKDV UKFV UKLV UKOV B) 2202240156 C) 2202242359
E) FLIGHTS OF CIVIL ACFT WITHIN FIRS KYIV (UKBV)
DNIPRO (UKDV) LVIV (UKLV) ODESA (UKOV)
SIMFEROPOL FIR (UKFV) AND THE KYIV UIR (UKBU) ARE
RESTRICTED DUE TO POTENTIAL HAZARD FOR CIVIL
AVIATION.)

Feb 24



[Ukraine's UIA loses insurance cover for some planes in Ukrainian airspace](#)
| [Reuters](#)

ALTA will meet in-person in 2022



**CCMA & MRO
CONFERENCE**

MAY 15-17, 2022
CARTAGENA, COLOMBIA

ALTA

The banner features a background image of the Colombian flag waving in front of a city skyline under a blue sky with light clouds.

**11th PAN AMERICAN
AVIATION SAFETY
SUMMIT**

SAO PAULO
BRAZIL

2022
JUNE 6 - 8

The banner features a background image of a large commercial airplane on a tarmac, with colorful, flowing abstract shapes in orange, yellow, and green on the left side.

**ALTA AVIATION
LAW AMERICAS**

2022
SEPTEMBER 14-16
RIO DE JANEIRO, BRAZIL

ORGANIZED BY
ALTA

The banner features a background image of a scenic view of Rio de Janeiro, Brazil, showing the bay, mountains, and buildings.

**ALTA
AIRLINE
LEADERS
FORUM**

**BUENOS
AIRES**
ARGENTINA

2022
OCTOBER 16-18

The banner features a background image of a city skyline at night, with illuminated buildings and a bridge over water.



Aviation has demonstrated
to provide an **esencial**
service that brings people
and opportunities closer



ALTA_aero



ALTA Latin America and Caribbean Air Transport Assoc

www.alta.aero