



# SETTING THE SCENE

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REGIONAL VICE PRESIDENT, THE AMERICAS

Our mission is to represent, lead and serve the airline industry. 

# THE 1<sup>ST</sup> SCHEDULED COMMERCIAL FLIGHT



TODAY...



# WHERE ARE WE NOW?



## Globally,



- We will carry 3.3 billion passengers
- 53 million tonnes of cargo
- 44% of the earth's population
- Aviation supports 58 million jobs
- Over 40,000 city pairs

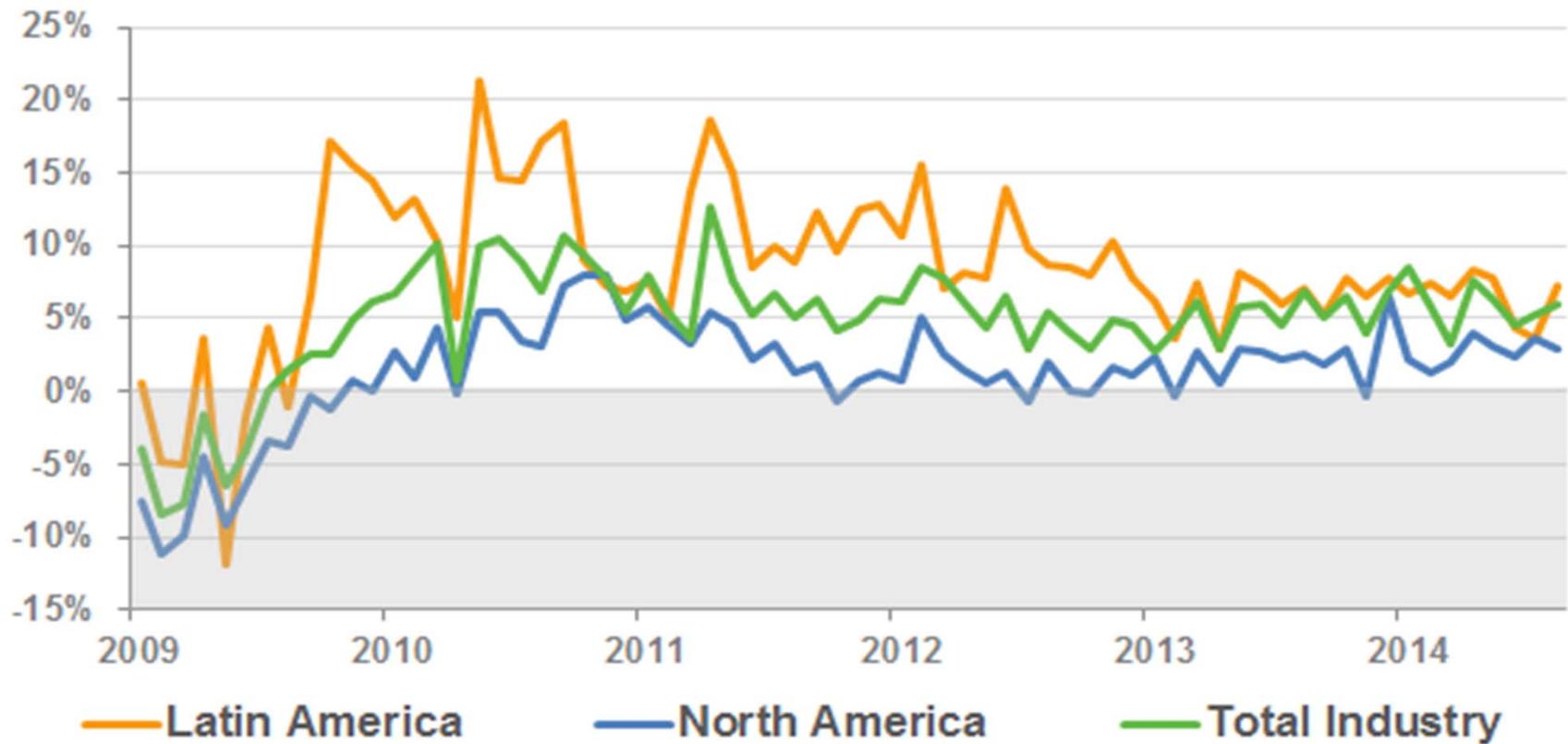


# PASSENGER VOLUMES



## Growth in air passenger volumes

RPKs, % Growth year-on-year

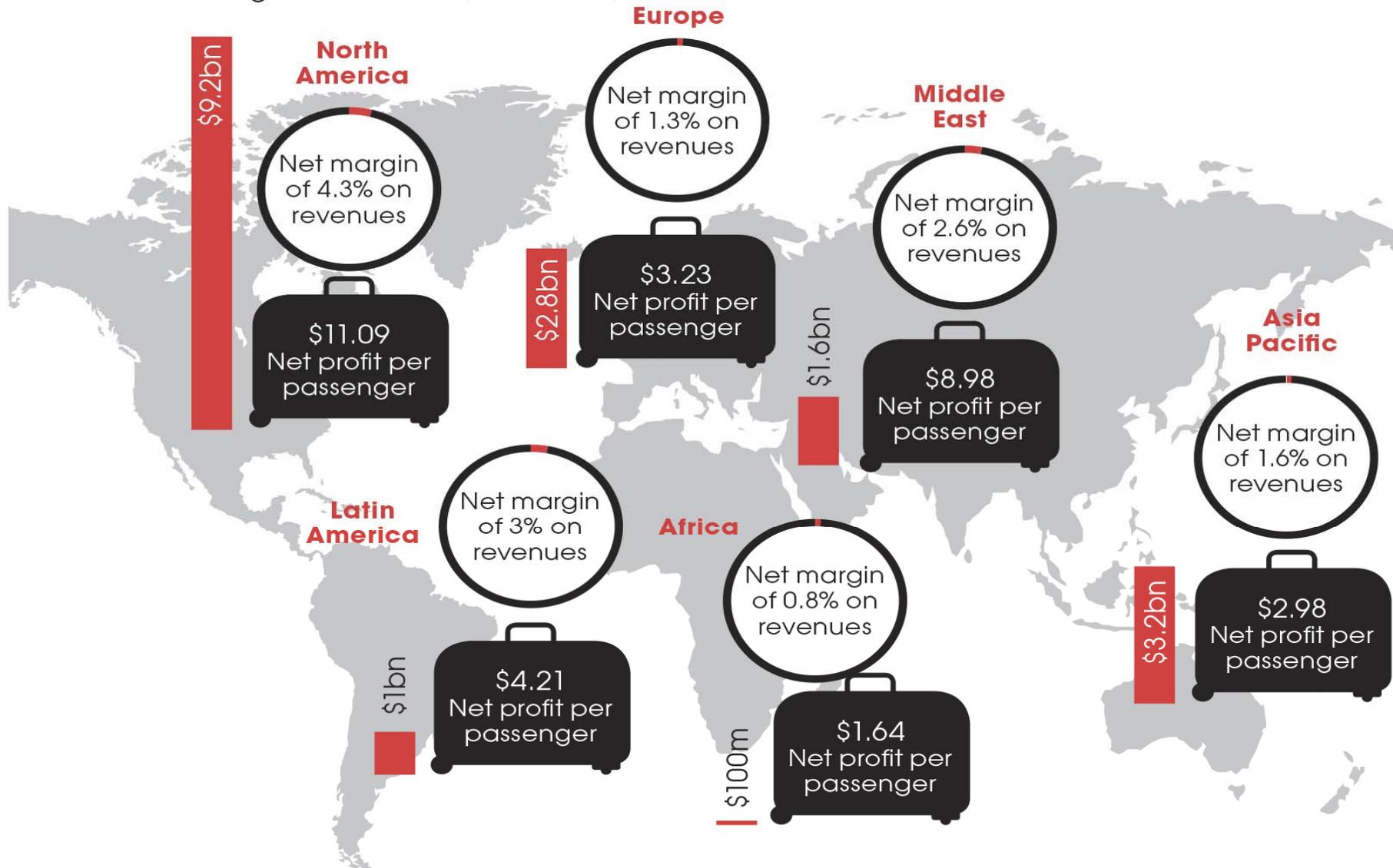


Source: IATA



## Regional profitability

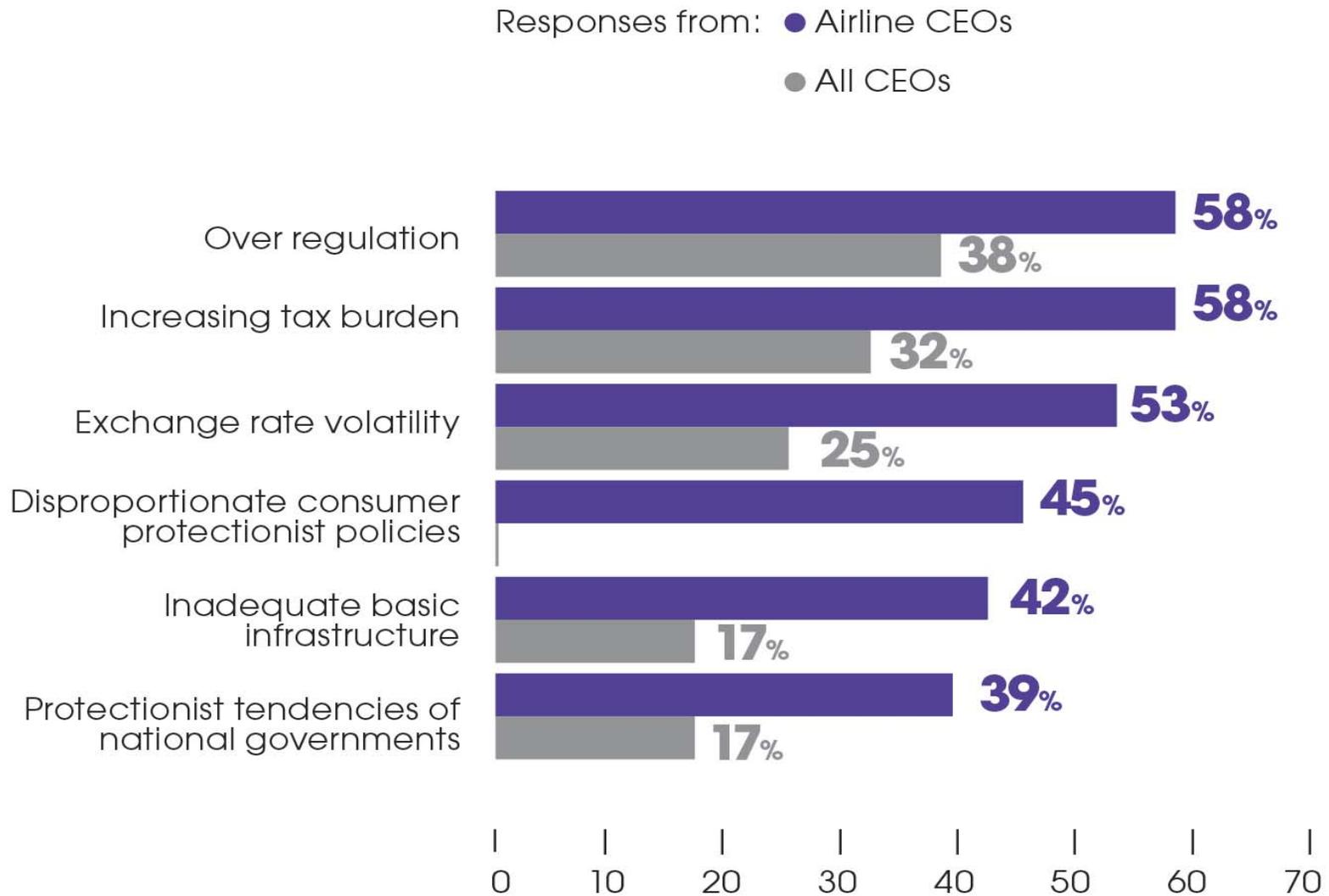
All regions are expected to see an improvement in profitability in 2014 over 2013. Local issues and economic conditions, however, mean that the improvement is not uniform. All figures are 2014 (estimated)



# GLOBAL & REGIONAL CHALLENGES



# What are the macro-economic threats to growth?



# AIRPORTS & ATM INFRASTRUCTURE



- Demand exceeds capacity
  - Infrastructure does not support today's needs
  
- Congested and inefficient airspace
  - PBN implementations is slow
  - Airspace redesign is lagging
  
- What's the regional NextGen?



# TAXATION



Fuel as a percentage of airline costs

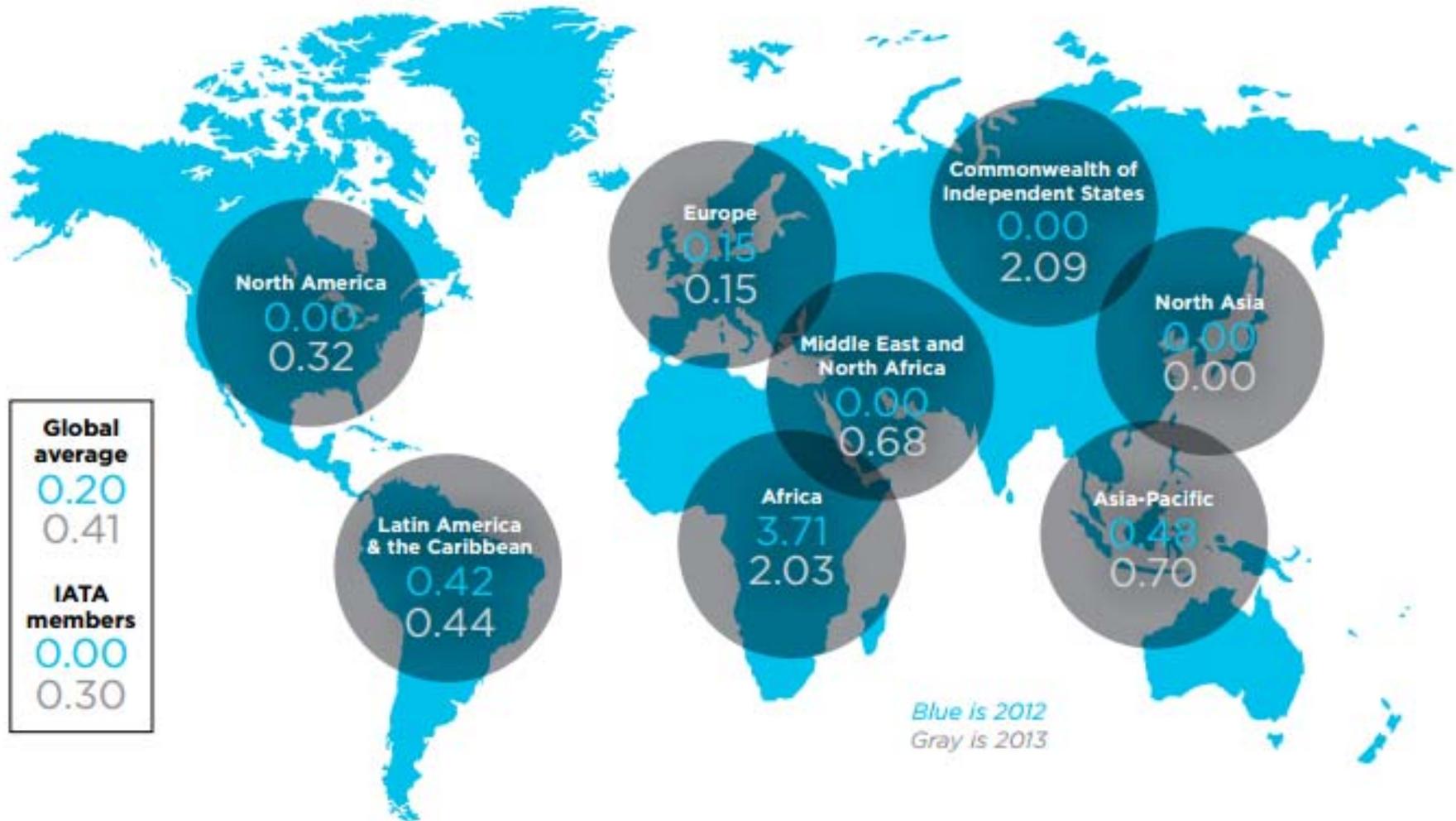
FUEL CHARGES



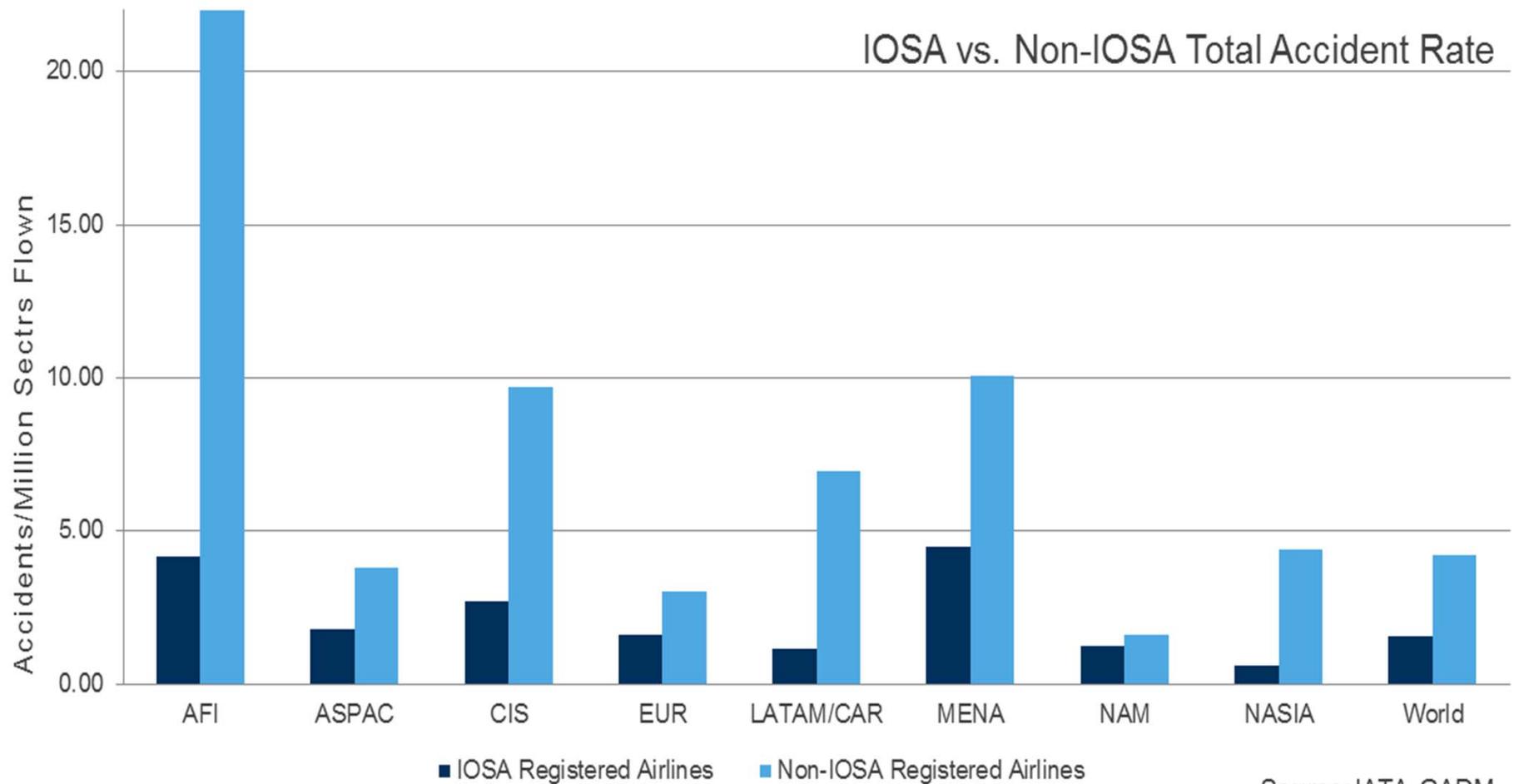
# SAFETY IS OUR NUMBER 1 PRIORITY



# WESTERN BUILT JET HULL LOSS RATE PER MILLION SECTORS



# IOSA VS. NON-IOSA TOTAL ACCIDENT RATE 2009 - 2013





WHAT'S NEXT?

“THE BEST WAY  
TO PREDICT THE FUTURE  
IS TO CREATE IT.”

Abraham Lincoln



# MIDDLE EAST AUGUST 2014



THANK YOU



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