

WORLD AVIATION CONFERENCE

8th – 10th of September 2026

Future of Aviation

Luis Felipe de Oliveira

Executive Director & CEO



Main Industry Challenges



Slower global GDP growth



Regulatory Framework



Higher costs



Shifts in traffic



Political Instability



Sustainability





Fuel costs
affecting the industry



Supply chain
restrictions



Increase on the costs
to the airlines



More flight
restrictions

Slower Economic Growth

World economy
Expect to Growth
around

3%

2

Advanced economies 1.7%

US 2.3%

EU 0,9%

1

India 6.4%

Asia 5%

China 4.6%

3

Subsaharan Africa 4.3%

Latin America Caribbean 2.4%

Middle East 0.7%



The economic grow is attached with the propense to travel

Source IMF



Traffic 2026 YTD

+2.1%

Source IATA



RPK 2026 vs 2025
Passengers

5.1B

segment

4.4B

origin-destination



CAGR 2024-2044

3.3%

Airport Challenges



Keep the infrastructure
Investments



Use of the technology to enhance
revenues and customer Experience



Regulatory framework



Workforce and Robotics



Fuel and SAF supply



Insurance

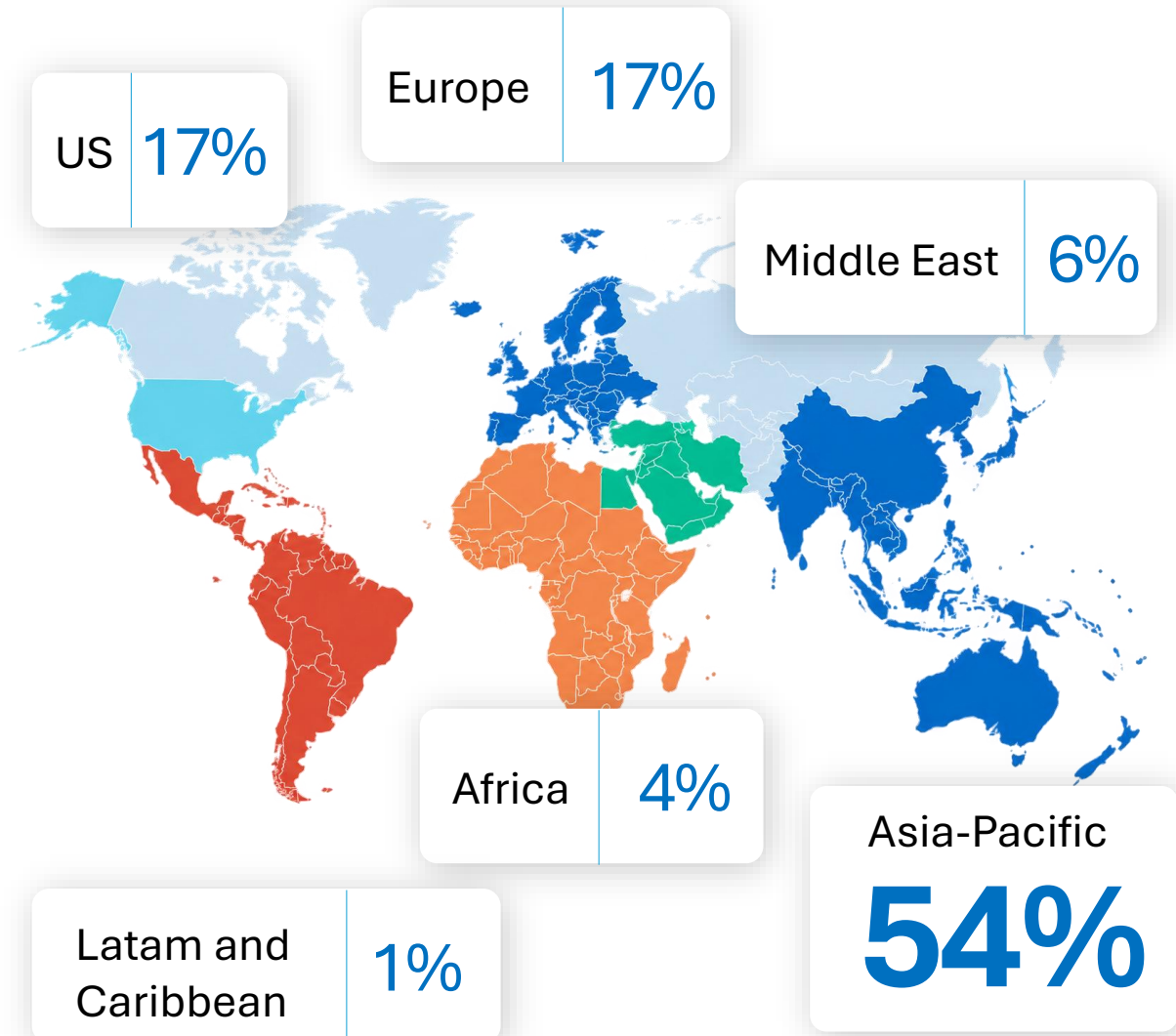




Airports will need

\$ 2.4 Trillion
USD

in Investments for
GREENFIELD & BROWNFIELD



BCG Survey 2030

According to BCG's latest aviation research, the biggest AI value pools are expected to come from:

1

Integrated
airport control
towers

2

Real-time
disruption
management

3

Dynamic
airline pricing
and retailing

4

Predictive
maintenance

5

Agentic
operational
workflows

6

Personalized
customer
journeys

7

Digital twins
for airports
and network

PREDICTIVE ANALYTICS



DELAY RISK
LOW
8% PROBABILITY



INTELLIGENT AUTOMATION



RUNWAY SUGGESTION
RWY 27L



TAXI ROUTE OPTIMIZED
REDUCING CONGESTION



SEPARATION ASSIST
MONITORING - ALERTS



WEATHER ADAPTATION
ADJUSTING OPERATIONS



EXHIBIT 02

How Ai Leaders Create Value Throughout The Ecosystem



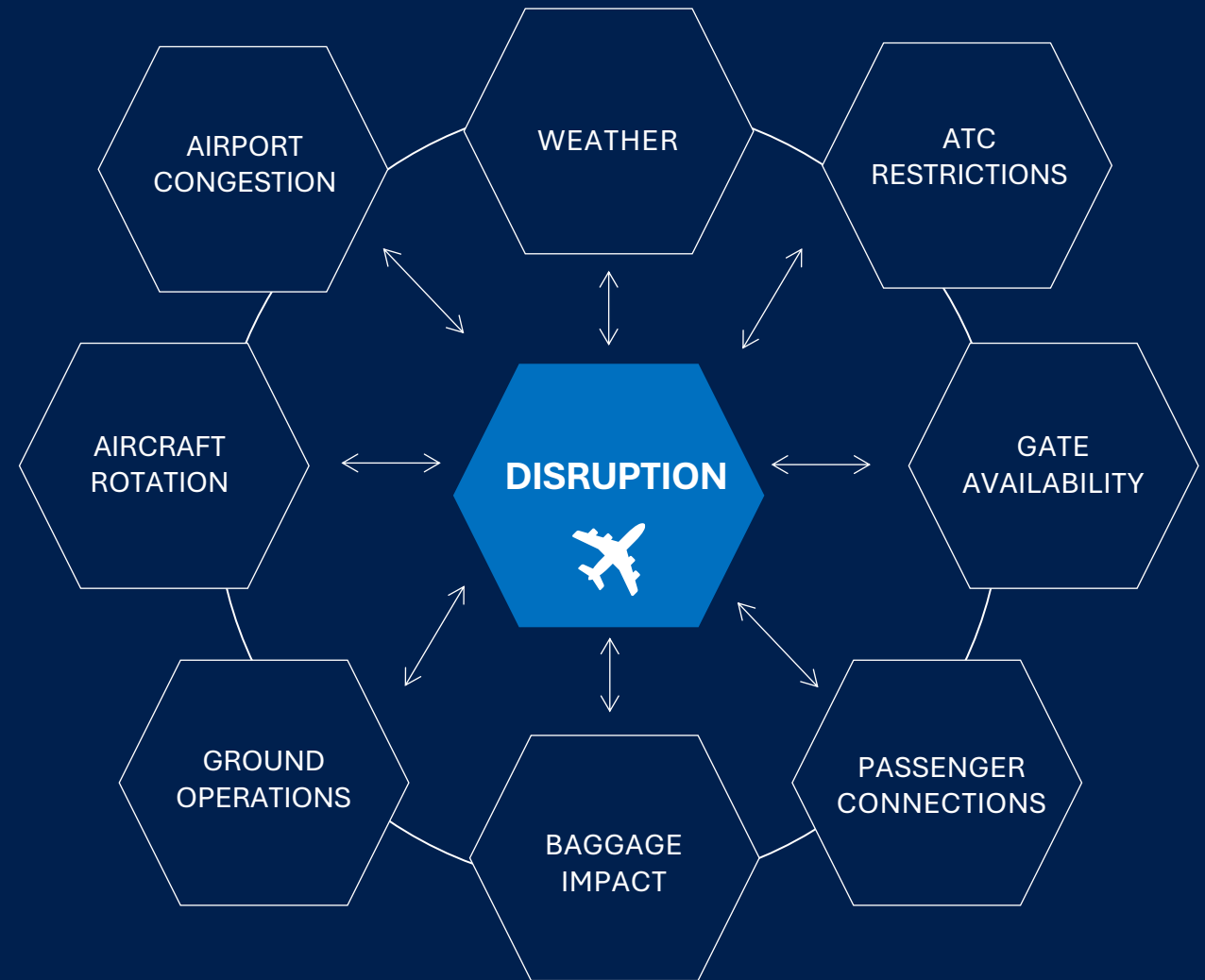
Sources: Airport And Airline Annual Reports; Exactly Analysis

AI IN TRAVEL SERIES

IROPS: Where AI Really Makes a Difference

**Fragmented decisions →
cascading disruptions**

- Growing demand.
- Same infrastructure.
- More pressure.



PREDICT
Anticipate
disruptions

VISIBILITY
Anticipate bottlenecks
and reduce queues

OPTIMIZE
Turnaround and
resources

PRIORITIZE
Passengers and
decisions

The technology already exists. **What is still missing is ORCHESTRATION.**

Source Amadeus



Importance for
safety and security



The weight of regulatory
framework in the
industry costs



Lack of
harmonization



Slow adoption of
developments

Regulatory Framework

Few examples...

Infrastructure

Runway Lighting

from Manual/Visual
Inspections



**Automated
Monitoring Systems**



➔ **Regulatory framework**

➔ **Evolution to a data driven predictive maintenance**

From **Good** to

Bad examples



European
Single
Aviation
Market



Global
international
safety
standards



Not Having
a single
European
skies



Latin America
lack of
harmonization
on Aviation
sector

Hidden Challenges



Fuel and Sustainable Aviation Fuel



Total global consume

104

Billion AG / Year



Cost to the industry

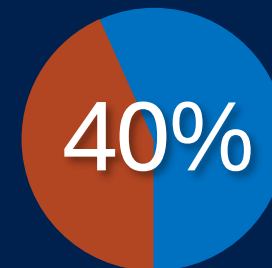
\$350

Billion USD a Year



+39%

than 2025



of an airline
cost



1 cent per gallon



1 billion dollars a year



SAF still representing less than 1% with around **3 times more in costs**

How **fuel Infrastructure** can play positive impact for Airports

- Single independent fuel farm
- Open access to fuel providers
- Variable numbers of ITP Services
- Expertise in Supply chain outside of airport fences
- Fuel Farm prepared to operate with SAF
- Hydrogen
- Batteries to storage energy



Advantages



Control over the fuel volumes at the airport



Manage the concession of the infrastructure with specialized companies



More competition on the fuel prices



More attractiveness with possible low fuel prices



More revenues via concession fix and variable income

Insurance

Global cost for the industry is around

8B

- Real **risk analysis**
- Comparative **offers**

Future airports will be totally different.

EVTOLs, Autonomous Vehicles, AI, Cyber Security...

Insurance companies are ready for airports of the future?

Robotics

How we can
replace human
functions with
robots

- We are already develop robots for information, delivering food, cleaning the airport...
- **But we need to go further:**
ground handling, cleaning toilets, some activities in F&B...

Technology



Costs



Efficiency



Human

감사합니다

Thank You

