

AIRLINE BUSINESS DAILY

BRINGING YOU THE NEWS FROM THE ALTA AIRLINE LEADERS' FORUM 2008 IN CANCUN, NOVEMBER

Caribbean CEOs speak out

Yesterday's Caribbean panel featured, from left to right front, LIAT's Mark Darby, Bruce Nobles of Air Jamaica, Gilles Filiatreault of Cayman Airways and Philip Saunders of Caribbean Airlines, and was moderated by Olivier Hourri, president of Global Transportation at Unisys.

■ For full story see p8



Hazy seeking to buy back ILFC

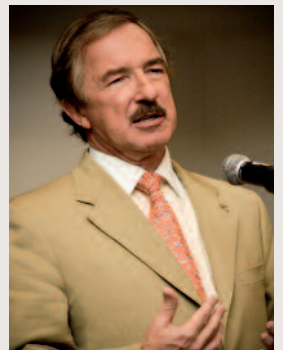
ILFC founder and chairman Steven Udvar-Hazy (pictured) took time out from a hectic schedule of global road shows to address ALTA yesterday.

His goal is to put together a "sophisticated investment group" to buy out the huge aircraft lessor from current owner American Investment Group, which was rescued by the US government in September.

"We are doing road shows meeting with large sovereign wealth funds, institutional investors and others from Europe, the Middle East and Asia," says Hazy, who founded ILFC 35 years ago and sold it to AIG in 1990 for \$1.3 billion. ILFC management will also take part in the financing group he is seeking to establish.

While the credit crash has made raising funds difficult, Hazy says the appetite for the deal is good. "There are a lot of solid, sophisticated investors that we are talking to, but I can't predict the outcome," he says.

"We are looking to close on the deal by March 2009," he says. ■



ALTA TO CARTAGENA - KRIETE TO TOP JOB

BY MIKE MILLER/BRENDAN SOBIE

ALTA airline members had a productive final day of the 2008 Airline Leaders Forum, securing a breakthrough commitment from the region's transportation secretaries, appointing a new president and selecting a new venue for the 2009 forum.

Grupo TACA chief executive Roberto Kriete was selected by his peers to assume the presidency of ALTA from Copa chief executive Pedro Heilbron. ALTA members also voted to move the forum to South America for the first time, selecting the Colombian city of Cartagena for 2009. Cancun has hosted the forum the last three years and the first two years it was held at ALTA's hometown of Miami.

In the morning ALTA airline



Humberto Treviño Landois

CEOs had a power breakfast with 20 senior government officials representing 15 countries. ALTA executive director Alex de Gunten and Mexico deputy secretary of transportation Humberto Treviño Landois said the meeting was extremely productive and although nothing specific was agreed to, the two sides pledged to meet again in

the near future to discuss various efficiency improvements.

"There are a lot of things we want and are willing to do," Landois told the *Airline Business Daily* after making the closing speech for this year's forum. "I think everyone needs to work together. Obviously there's lots of room for improvement."

Landois says improving the management of Latin America's airspace and airports was discussed on a general level yesterday morning and "we now need to come up with more specific plans on how it will work".

While no specific improvements were committed to, the meeting left Latin America's airlines confident

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LatAm CEOs say its time to lie low

Airlines in the region expect no growth and sensible cost-cutting to highlight next year's plan

BY MARK PILLING

The Latin carrier bosses on ALTA's executive committee gave out a unified message yesterday to cope with the industry crisis: keep your heads down.

Pedro Heilbron, Copa's head, set the tone: "Right now it is the time to lay low and let the bullets fly by." Although it is virtually impossible to tell how tough next year is going to be, carriers are cutting back on their growth and preparing for a rough 2009, say the airline chiefs.

"Airlines will be responsible and careful and flexible," says Roberto Kriete, chief executive of TACA. "We have lots of flexibility in our fleet where half of it is leased. This gives us the option of renewing leases if we want to grow, or we can return aircraft as contracts end." TACA is planning zero capacity growth in 2009 at present.

Avianca chief Fabio Villegas says the Colombian carrier will continue its fleet renewal programme and it will add some capacity as Airbus A330s replace Boeing 767s. This process will greatly assist in its efficiency drive. It will take some capacity out in 2009 as it retires its fleet of 16 MD-80s, he says.

LAN boss Enrique Cueto says

his carrier is taking sensible cost-cutting measures like postponing the construction of a new headquarters building and putting in a hiring freeze. Cueto is one of several CEOs who believe further consolidation among Latin carriers is inevitable.

Mexicana chief executive Manuel Borja Chico says that in

"Right now it is the time to lay low and let the bullets fly by"

Pedro Heilbron
CEO, Copa Airlines



Avianca chief Fabio Villegas

his country the number of players has dwindled from 14 to 8. "Consolidation is unavoidable in the next few years, but it will take due time." In Mexico he sees one network carrier and two low-cost players surviving, as well as some regional airlines.

Overall, Heilbron believes the region's carriers are "highly focused on obtaining the flexibility they need while not losing the focus on quality and cost

which have always been the pillars of our business."

"It's very clear the region is in very good hands," summed up session moderator, Michael Bell of Spencer Stuart. ■



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FLYHT spells savings a different way

BY MIKE MILLER

When every minute counts, one company believes greater efficiencies can save Latin carriers 3.5 minutes every flight.

AeroMechanical Services, which works with 32 airlines, sees airline saving from aircraft data collection that can instantly tell whether a decision or flight is out of the ordinary. "Serious flight incidents are reported in 18 seconds," says Richard Hayden, company president.

Savings comes from accurate operational reporting, identifying errors more quickly, and tracking

crew and maintenance issues more efficiently. One airline customer has discovered a 5% fuel burn savings from AeroMechanical's FLYHT product, which competes with ACARS as a piece off cockpit reporting technology.

Airlines also are using the system to challenge overflight fee invoices, since the system can identify airspace used. Hayden says Latin carriers also can improve efficiencies by spotting aircraft operational procedures - such as single engine taxi - and tracking whether the crew onboard is actually following the fuel-saving processes the airline wants to use. ■

AIRLINE BUSINESS DAILY

PUBLISHED BY AIRLINE BUSINESS IN ASSOCIATION WITH AEROCOMM

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Advertisement sales

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Printed by

Pixel Press,
Cancun

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MUSIC TO HER EARS...

The lucky winner of the 'business card draw' for an iPod Nano - presented by Air Transport Intelligence (ATI) - is Mirja Nissen, Lufthansa Consulting's director of sales for the Americas. All entrants who dropped their business cards off at ATI's booth are also entitled to receive a free trial of ATI's on-line information service, the leading source for the global air transport industry.



Volaris plans first US route for 2009

Mexican carriers will operate to 10 US airports as Southwest deal comes to fruition

BY BRENDAN SOBIE

Mexican low-cost carrier Volaris plans to launch its first route to the US by the end of next year and operate to at least 10 US airports by 2015.

Volaris chief executive Enrique Beltranena say the carrier, which earlier this month announced a codeshare agreement with Southwest Airlines covering new transborder flights, will begin serving its first US airport in the fourth quarter of next year. He says Volaris' new international operation will begin small but rapidly grow as it takes delivery of additional Airbus A320 aircraft.

"We're targeting in the next three to five years at least 10 to 12 markets," Beltranena said yesterday during a press conference at

the ALTA airline leaders' forum to announce the purchase of V2500 Select One engines from IAE.

He says Volaris' memorandum of understanding with Southwest prohibits Volaris from identifying any specific US airports it is targeting, but he says they are "the most dense airports Southwest is utilizing". Airports with large Southwest operations include Phoenix, Las Vegas, Baltimore, Orlando and Fort Lauderdale.

On the Mexico side, Beltranena says Volaris plans to operate US

"We're targeting in the next three to five years at least 10 to 12 markets"

Enrique Beltranena
chief executive, Volaris



Steve Pattison (left) and Enrique Beltranena

flights from several gateways in addition to its base at Toluca outside Mexico City.

Beltranena says Volaris and Southwest plan to select by the end of February which transborder routes they will serve.

He says Volaris has already begun working on a marketing plan to raise awareness of its brand in the US ahead of the launch of sales. "It's part of our plan," he says. "It will be a total failure if we don't do it."

Beltranena reveals the deal with Southwest appoints Volaris as the exclusive operator on all Mexico-US routes, meaning Southwest will not operate any of its own aircraft into Mexico at least for the foreseeable future. But Southwest will be able to sell tickets on Volaris'

transborder flights as well as on connecting domestic flights in Mexico while Volaris will be able to sell tickets on connecting Southwest-operated domestic flights in the US.

Beltranena expects 78% of the passengers flying on Volaris' new transborder services will be point-point with the other 22% connecting onto domestic flights in Mexico or the US.

The deal with IAE announced yesterday makes Volaris the third Latin carrier to go with the upgraded V2500 Select One engine after TAM and TACA. Volaris is already a V2500 customer and IAE vice-president of the Americas Steve Pattison says the new engine will reduce Volaris' fuel burn by 1% and time on wing by 20%. ■

Downturn sees TACA cut capacity

BY BRENDAN SOBIE

Central American airline group TACA has decided to return several Airbus A320s to lessors and cut capacity on North American flights in response to falling demand due to the current economic downturn.

TACA CEO Roberto Kriete told reporters yesterday during a press conference at the ALTA airline leaders' forum in Cancun that the carrier will cut capacity on Central America-North America routes by 10% next year and return five or six Airbus A320s to lessors.

But Kriete says the El Salvador-based carrier has kept intact plans to grow capacity by about 10% on routes within Latin America and to the Caribbean, as these



markets continue to hold up despite the downturn.

As a result, TACA's overall capacity will be flat next year, with the delivery of seven new Embraer E-190s in 2009 offsetting the planned return of five or six A320s.

Last year TACA ordered 11 E-190s, the first four of which Kriete says will be delivered by the end of this year. Kriete says the 10% capacity cut on North American routes "is in line with what everyone else is doing", pointing out US carriers have made similar cuts on their Central American routes.

Most Latin carriers have not yet matched the capacity cuts made by their US and European counterparts because the region's

economies remain relatively strong. For example Central America's other large carrier, Panama-based Copa, last week said it still planned to grow capacity by 13% next year.

NORTHERN EXPOSURE

But Kriete says TACA is more dependent on the US market than Copa and other Latin carriers. "We have a lot more exposure to US and North American markets than any of them," he says.

He says TACA has been able to reduce its dependence on the US market over the last three years from 60% to 45% and is continuing to focus more on routes within Central America and to South America and the Caribbean. But he adds: "You can't do it all at once."

Kriete says TACA had the flexibility to cut capacity on North American routes because the leases on five or six of its A320s are sched-

uled to expire 2009. If there wasn't a downturn TACA would have opted to extend some or all of these. TACA currently operates 33 A320 family aircraft and has 15 on order.

Kriete says privately-owned TACA is on pace to generate \$1.1 billion in revenues in 2008 and a modest profit. But given the economic downturn, particularly in the US, he says it will be difficult to stay profitable in 2009 and revenues will likely again be around \$1.1 billion.

"I think 2009 will be a difficult year," Kriete says, adding the carrier is now trying to reduce costs where it can. For example to save costs it elected recently not to acquire an E-190 simulator.

"It's difficult to plan right now because the fog is on the ground," he adds. "2009 is difficult to forecast but we'll try our best to be very profitable." ■

Continued from Page 1

that long desired improvements in airspace and airports could finally be achieved. This in turn could generate significant cost savings just as the industry enters a downturn.

"There was a commitment from both sides to work together to solve issues facing the region," de Gunten says. "We had a good conversation."

ALTA's new board, led by Kriete and Avianca CEO Fabio Villegas as vice president, is sure to make an improved relationship with Latin America's civil aviation authorities a top priority. Besides Kriete and Villegas, the new board comprises of Heilbron, LAN CEO Enrique Cueto and TAM president David Barioni Neto.

Kriete, during his closing remarks, called on ALTA member airlines to have a "very special approach to our employees" this year during the global economic downturn. ALTA vows to treat its members and affiliate members as "customers" and thanked them for the vital role they play in the financing of ALTA activities. ■

Pluna to get \$50m more

Biggest challenge ahead is closing deal with Uruguay government

BY BRENDAN SOBIE

Germany-based investment firm Leadgate, which last year became the majority owner of Uruguay's Pluna, expects to forge a new deal with the government over the next few weeks and pump another \$50 million into the carrier.

Leadgate's relationship with Pluna soured in August after Pluna's Leadgate-appointed management team decided to axe the carrier's only long-haul route. The two have since been arguing over recapitalisation and an unpaid fuel bill with Uruguay's national petrol company.

But speaking to *Airline Business Daily*, Pluna CEO Matias Campiani says Leadgate is close to completing a new deal with the Uruguay government. The deal will settle the unpaid fuel bill, mainly through the government taking back ownership of a hotel that Leadgate took as part of the original deal.

Campiani says Leadgate also has agreed to put another \$50 million into the airline.

"We're negotiating with them to

settle everything," Campiani says.

After taking over the carrier in July 2007 Leadgate put about \$180 million into the airline. It has since restructured Pluna, changing its fleet and network and reducing its costs. Campiani says November or December will be Pluna's first break even month.

"Our biggest challenge now is closing the deal with the government and entering into an agreement with both unions," he says.

"These are three big challenges

that will need to be solved in the next few weeks."

Pluna's two unions have been threatening in recent weeks to strike the carrier. The unions, one of which covers the pilots and the other the flight attendants and ground handling workers, combined represent nearly all 600 of Pluna's employees.

Campiani says Pluna can't afford to give the unions salary increases but is confident a deal can be reached with both unions before the end of the year. ■



Close to a new deal: Pluna CEO Matias Campiani

'No panicking' from Caribbean carriers

BY BRENDAN SOBIE

Caribbean carriers have not yet noticed a drop in demand and remain confident they can weather the current storm.

LIAT chief executive Mark Darby says the Antigua-based regional carrier "had its first profitable October ever" and has not yet noticed any sign of a downturn. "What we're not doing is panicking," Darby told the forum yesterday.

Speaking on the same panel, Caribbean Airlines chief executive Philip Saunders agreed: "We've seen no reduction in demand. In fact it's been exactly the opposite. We've seen robust growth."

Cayman Airways chief executive Gilles Filiatreault says bookings remain solid through Christmas and

in response to high peak season demand the carrier is resuming services to Chicago and launching services to Washington in December. But he acknowledges "there is a concern beyond that".

While there has been little to no impact yet on bookings, the region's carriers are prepared to quickly react should the downturn start to impact their businesses next year. For example, Filiatreault says Cayman is looking at potentially leasing out some of its capacity for the 2009 off peak summer season, something it has never done.

Saunders says Caribbean is not "naïve" about the future and points out that when Caribbean added an aircraft earlier this

month it opted for a wet lease to give it the flexibility to quickly return the aircraft should there be a downturn.

Darby says unlike in past downturns, when LIAT would refuse to cut capacity, the carrier this time is willing to make cuts. "We have to be prepared to put aircraft on the ground and ride it out," Darby says.

STIMULUS NEEDED

To combat a potential downturn, Air Jamaica chief executive Bruce Nobles says the carrier is now working with Jamaica's hotels to try to stimulate the island's tourism market. "We need to give people stimulus and reason to come to Jamaica. We're doing

everything we can, working with Jamaican authorities, but it will be a challenging year."

So far promotions have helped keep Air Jamaica's bookings from sinking significantly but Nobles says "what we're seeing is people are clearly taking longer to decide".

Air Jamaica is now going through a major restructuring, with Nobles trying to cut costs while Jamaica's government looks to sell the flag carrier. Nobles says the carrier is now talking to a number of potential investors from both inside and outside the industry. "It's a very time to go through this process but sometimes bad times are good times to make an investment," he says. ■

NCR sees revolution in Latin check-in

New generation technology set to speed things up

BY MIKE MILLER

Latin American carriers could generate oodles of extra money and speed check-in for passengers at the same time by implementing new-generation self-service kiosks and paperless mobile check-in processes.

NCR, which works with airlines worldwide, including Aeromexico, Copa Airlines and TACA in LatAm, says one airline customer recently has generated more than \$100 million in non-ticket revenue in less than two years via cross-selling at the point of check-in. This includes kiosk-based upgrades, paid stand-by, change fees and other choices.

"A lot of airlines in Latin America are evaluating non-ticketing revenue, including international web check-in and more uses for mobile devices," says Alex Gonzalez-Mir, NCR's director Caribbean and Latin America.

Paperless boarding passes are being trialed by Delta Air Lines at New York LaGuardia Airport, and Gonzalez-Mir sees the day when passengers can travel without paper. "Mobile is the revolution. The ability to put bar codes on any mobile device will allow the passenger to check-in and receive an IATA-approved bar code, go through security, fly and check in paperlessly at hotels and rental car

companies.

"In Peru, and in some places in Mexico, you can go to a retail location and pay for your airline ticket," he says. "In certain [LatAm] countries, there's more access to phones than the internet."

"We want to change the way business is transacted" in aviation, says Eduardo Rozen, NCR airline and hospitality account executive, noting that Latin America is slowly moving away from getting a paper signature on a receipt with a logo or seal.



Alex Gonzalez-Mir

Cost savings is the other reason LatAm airlines are exploring more e-options. Internet check-in costs less than US\$0.14 per transaction, while kiosk check-in costs

\$0.14-0.32. But agent-based check-in costs \$3.02, according to Forrester Research, and those figures also apply to Latin America, Gonzalez-Mir says. "Latin carriers can save one [airport agent] for every four kiosks deployed," and with airport space at a premium in many LatAm airports, space efficiency is increasingly a factor. ■

Since we met last year at ALTA in Cancun these airlines have added or expanded service to Orlando International Airport:

	São Paulo - new daily service effective November 21, 2008
	Mexico City - new daily service effective December 1, 2008
	Bogotá - new daily service effective January 29, 2009 Nassau - new daily service effective February 1, 2009 Cancun - new daily service commenced March 13, 2008 Santo Domingo - new daily service commenced March 6, 2008
	Cancun - new weekly service commenced February 2, 2008
	Mexico City - expands to 14 weekly flights effective December 4, 2008
	Panama City - expands to double daily effective December 16, 2008

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REPORT | BRENDAN SOBIE

LEADING MEXICO'S "HIGH EFFICIENCY AIRLINE"

Interjet has moved fast to set up a large operation at Mexico City, says its CEO Jose Luis Garza

“Interjet may be one of Mexico’s four remaining low-cost carriers but chief executive Jose Luis Garza doesn’t like to use the term low-cost.

Interjet, Garza points out, offers a complete range of frills, has more legroom than any other Mexican carrier and now serves the country’s biggest and most important airport for business traffic. “I’m not a low-cost company. We’re inspired by the efficiency of low-cost companies. We prefer to be called a high efficiency airline rather than a low-cost carrier,” he says.

Garza says Interjet needs to offer a good product because it focuses on corporate traffic. Mexico’s other low-cost carriers, namely Volaris, Click and VivaAerobus now that ALMA and Avolar have ceased operations, are more focused on the leisure market.

While some of these carriers match Interjet in offering food, beverage and in-flight entertainment, Garza says the key differentiator is legroom. While Interjet only has one class, it configures its 13 Airbus A320s with only 150 seats, compared to the 180 typical for low-cost carriers. That translates into a generous 34in pitch. “We sacrificed 30 seats in the aircraft to have a good quality product,” Garza says.

Interjet’s biggest selling point these days, however, is its new network at Mexico City’s slot controlled downtown airport. The carrier launched services at Mexico City International in August after acquiring 50 slots from grounded carrier Aerocalifornia.

KEY DESTINATION

Interjet has long eyed access to Mexico City International as it is a key destination for its business passengers.

Garza says while costs are higher at Mexico City International compared to Toluca, Mexico City’s alternative airport where Interjet is based, yields are on average 15% to 20% higher. “The most important thing is revenues. The revenues are far better in Mexico City,” he says.

Gaining access to Mexico City was so critical to Interjet Garza says if it couldn’t get slots there it would have been forced to “drastically reduce its fleet and fixed costs in order to recover profitability for the rest of the year.” In



“We prefer to be called a high efficiency airline rather than a low-cost carrier”

Jose Luis Garza
chief executive, Interjet

fact Interjet was preparing to slash capacity by 40% and return six A320s until the opportunity to buy slots from Aerocalifornia suddenly became available.

“Fortunately that plan was never put into effect and we were able to get Aerocalifornia’s slots and fast entry into Mexico City,” Garza says. “Now it’s just the other way around and we’re anticipating accelerating our expansion.”

Garza is now looking for more A320s and more slots. Garza in particular is eyeing the slots held by Aviaca, a struggling legacy carrier which Interjet almost acquired early this year. Garza says he walked away from the potential deal with Aviaca because “the carrier was in the red and had high debt and the price was outrageous”. But he believes Aviaca remains weak and could become Mexico’s next airline casualty.

Securing any slots which become available may not be easy as Interjet is already fighting a legal challenge lodged by other carriers seeking to undo its slot transaction with Aerocalifornia. But Garza is confident Interjet will

prevail in the legal challenge.

“The slots at Mexico City are like a poker game. You need to get a seat at the table to understand how to play,” he says. “We’re now in position to play the game, despite them [legacy carriers] not liking us there.”

US APPROVAL

Interjet, which launched in late 2005 and expects to carry three million passengers this year, needs more slots at Mexico City to support domestic expansion as well as planned flights to the US. The carrier earlier this year secured US regulatory approval to launch services to Ontario, Houston and San Antonio from Toluca but Garza says there is better potential business for these new planned services if there are switched to Mexico City. He explains: “it’s easier for TSA security reasons” to operate to the US from Mexico City “and it’s much easier for marketing reasons” as US passengers are not familiar with Toluca.

While Interjet aims to eventually serve a few points in the US, Garza says its transborder operation will be a small side business. “Interjet is essentially a domestic carrier. Our international expansion will be limited except to routes where we have a competitive advantage, where we have a niche,” he says.

Although business passengers prefer Mexico City International because it is much closer to the downtown business district than Toluca and has longer operating hours, Garza says Interjet plans to restore some of the capacity it has taken out of Toluca to make room for the Mexico City operation. “We don’t want to abandon Toluca. We want to expand there. That’s why we need additional capacity,” Garza says. “If we leave some vacuum probably Volaris will take it.”

While 2008 has been a difficult year for all Mexican carriers, Garza says the new Mexico City operation should help Interjet break back into the black in 2009. He says Interjet needed a \$40 million capital injection back in April and its owners remain supportive with the expectation that an initial public offering will eventually be pursued.

“It’s always been in our business plan to go public in the future,” Garza says, adding there is no rush and when the IPO is done will depend on market conditions. ■



Going out with a bang: Drummers bring a rhythmic (and loud) end to the evening



And the winner is: Pedro Heilbron receives the Federico Bloch Award from Enrique Borgo Bustamante



PLANE TALKING

Pedro Heilbron, out-going ALTA president and the chief executive of Copa Airlines, took centre stage at Thursday night’s gala dinner as he received the Federico Bloch award for an outstanding contribution to the Latin aviation industry from Enrique Borgo Bustamante, former vice-president of El Salvador and ex-president of both ALTA and TACA.

Heilbron has led Copa for 20 years, building the Panamanian carrier into a strong and profitable force in Central America. In a note of congratulation, former Continental Airlines head Gordon Bethune, who was instrumental in the US carrier buying into Copa in 1998, said: “The bottom line is that Copa helped put Continental on the map in Latin America.”

The Captain Rodolfo Rolim Amaro award, that recognises outstanding customer service at airports or air navigation service providers, was not presented this year as no candidate met the criteria.

The sponsors of Thursday night’s dinner, Airbus, used the occasion to celebrate a remarkable collective deal to sell its aircraft to three critical Latin carriers. The so-called “three amigos” deal in 1998 saw LAN, TAM and TACA jointly placing a large order for Airbuses in what Barry Eccleston, chief executive of Airbus Americas, called a milestone for the manufacturer in the region. Based on the current order backlog, by the end of 2010 Airbus will have a 50% market share of the aircraft in service in the region. ■



Delegates enjoyed an evening of networking and celebrating the industry’s finest, or not, in the case of airports



■ The night’s music was sponsored by PowerJet – the JV between NPO Saturn and Snecma to power the Sukhoi Superjet 100 RJ

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