

GRUAIRPORT AEROPORTO
INTERNACIONAL
DE SÃO PAULO



LATIN AMERICA

PANAMA CITY, MAY 14, 2024



GRU AIRPORT KEY FIGURES

INDISPUTABLE LEADER IN BRAZIL AND A KEY PLAYER TO CONNECT SOUTH AMERICA WITH THE REST OF THE WORLD



NO. 1 CARGO AIRPORT IN BRAZIL
644,5 KTON & **56%** MARKET SHARE



145 K SQM WAREHOUSE AREA
EXPANSION TO **> 300 K SQM** BY 2025
(USD 120 MM INVESTMENT)



33 K CBM WAREHOUSE VOLUME
24 COLD ROOMS RANGING **FROM**
-18°C TO +25°C

169 DIRECT ROUTES IN 2023



CLOSE TO **60 REGULAR**
DOMESTIC DESTINATIONS

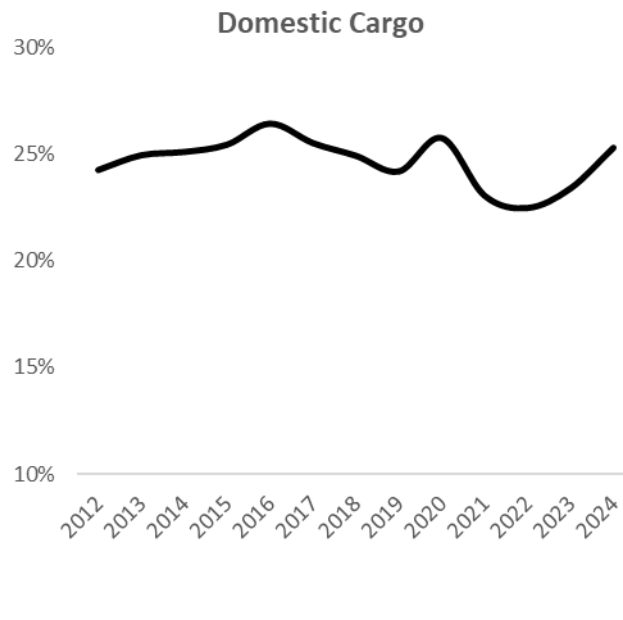
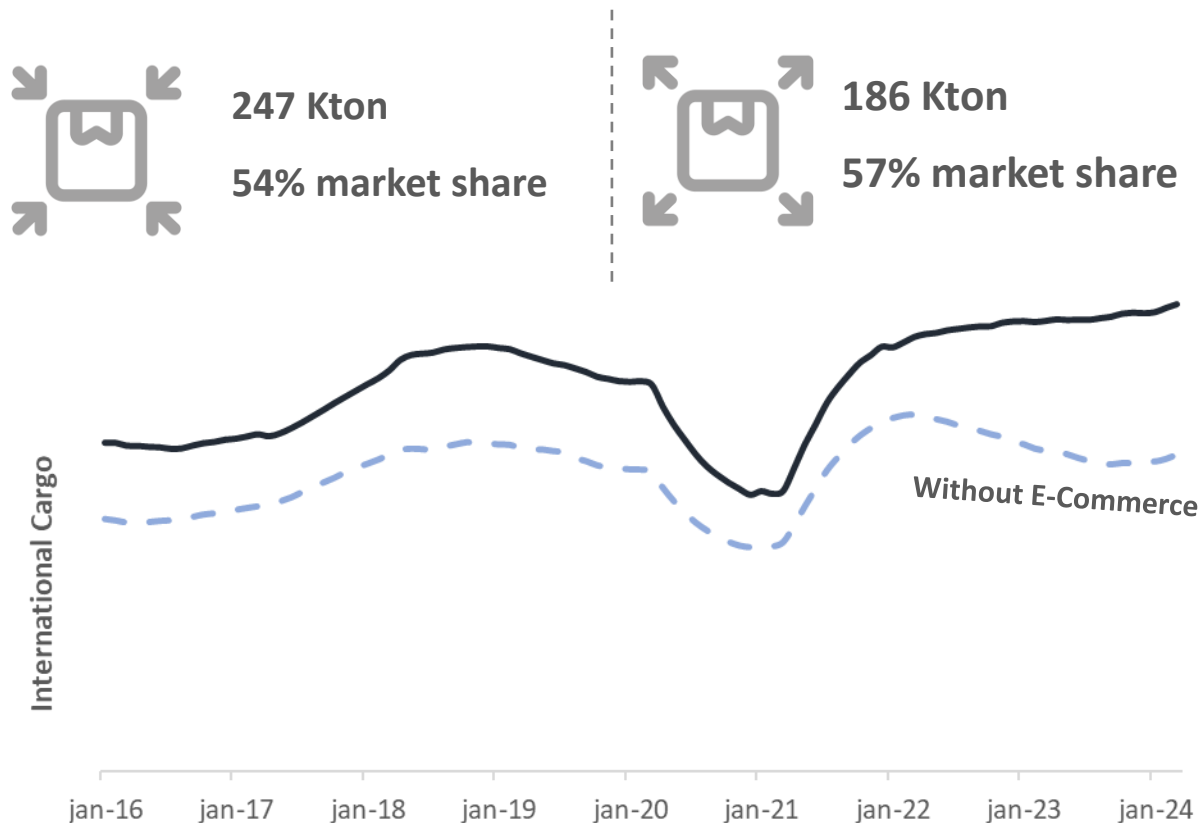


54 INTERNATIONAL
DESTINATIONS (REGULAR)



GRU AIRPORT KEY FIGURES

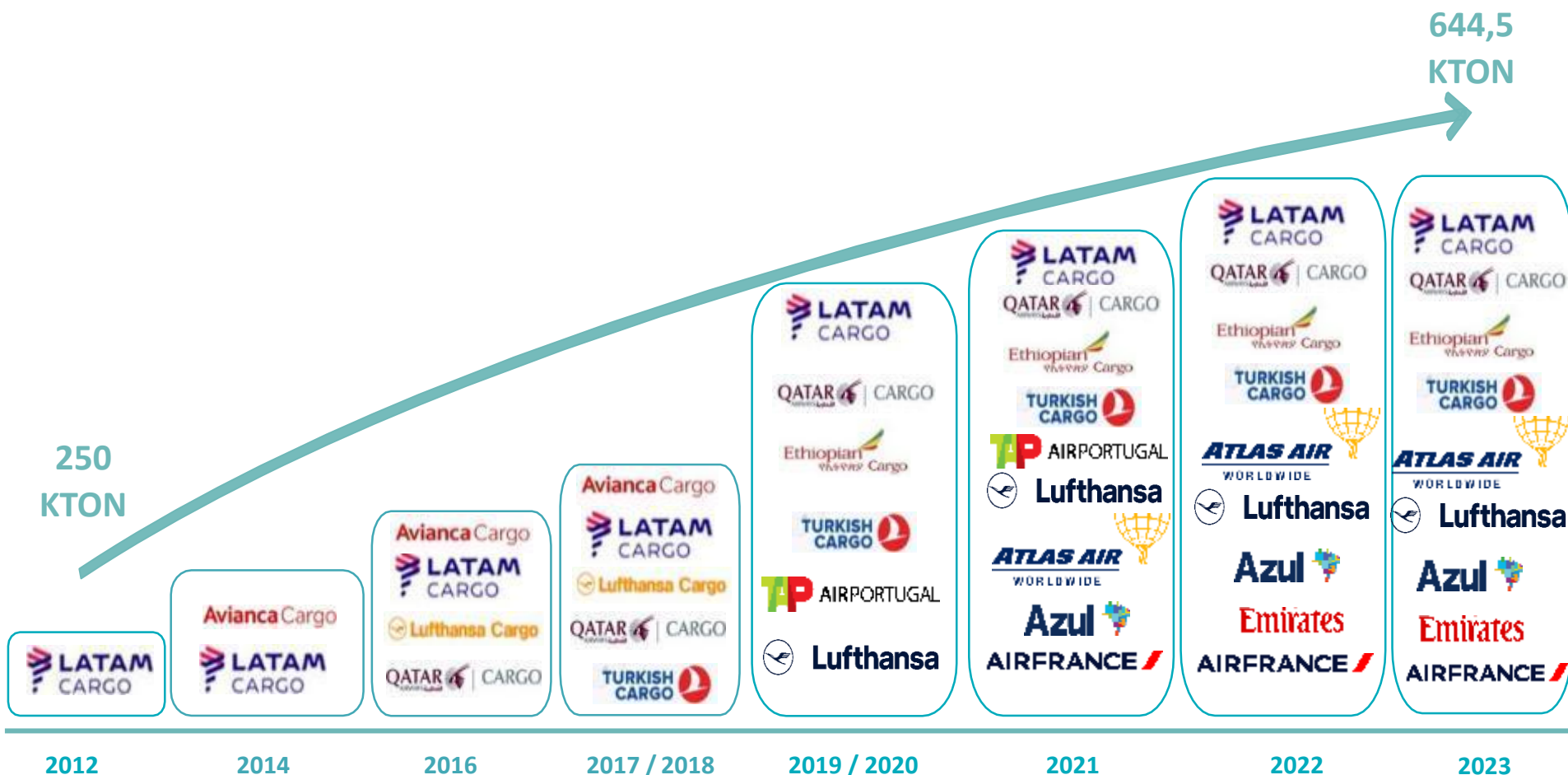
GRU IS A LEADER IN THE IMPORT, EXPORT AND DOMESTIC CARGO MARKET - INCLUDING E-COMMERCE



DECADE OF STRONG GROWTH



GROWTH SINCE THE PRIVATIZATION SHOWS HOW MUCH POTENTIAL WAS UP FOR GRABS AT AN AIRPORT OF THE SIZE AND RELEVANCE OF GRU



GRUAIRPORT AEROPORTO INTERNACIONAL DE SÃO PAULO

SOURCE: Data from 2023, unless otherwise noted

DECADE OF STRONG GROWTH



GROWTH SINCE THE PRIVATIZATION SHOWS HOW MUCH POTENTIAL WAS UP FOR GRABS AT AN AIRPORT OF THE SIZE AND RELEVANCE OF GRU



2012 2014 2016 2017 / 2018 2019 / 2020 2021 2022 2023

CHALLENGES IN LATIN AMERICA

STRATEGY IS BASED ON 4 CORE ELEMENTS – INFRASTRUCTURE, QUALITY OF SERVICE, REGULATORY ENVIRONMENT AND CARGO COMMUNITY

1

Infrastructure: During many decades LAC was lacking enough infrastructure to handle cargo.

2

Regulatory: Region is known for its challenging regulatory framework that reduces its attractiveness.

3

Fleet: Freighter availability is small, particularly for last-mile and secondary markets (NB fleets).

4

Unbalance & new types of cargo: Region very strong on perishables, imports, high-value goods and e-commerce.

5

Accessibility & last mile: Geography and distance demand a stronger network to connect smaller cities and regions.

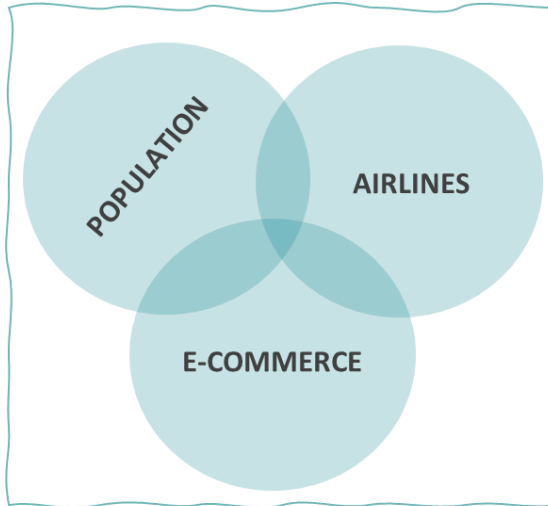
SO HOW TO HANDLE THE CHALLENGES?

STRATEGY IS BASED ON 4 CORE ELEMENTS – INFRASTRUCTURE, QUALITY OF SERVICE, REGULATORY ENVIRONMENT, AND CARGO COMMUNITY



INFRASTRUCTURE

AIRPORTS HAVE DIFFERENT NEEDS AND ARE NOT BETTER OR WORSE – JUST DIFFERENT. UNDERSTANDING THE POTENTIAL AND THE ECOSYSTEM IS VITAL.



COMMUNITY



OPERATIONAL
COMPLEXITY

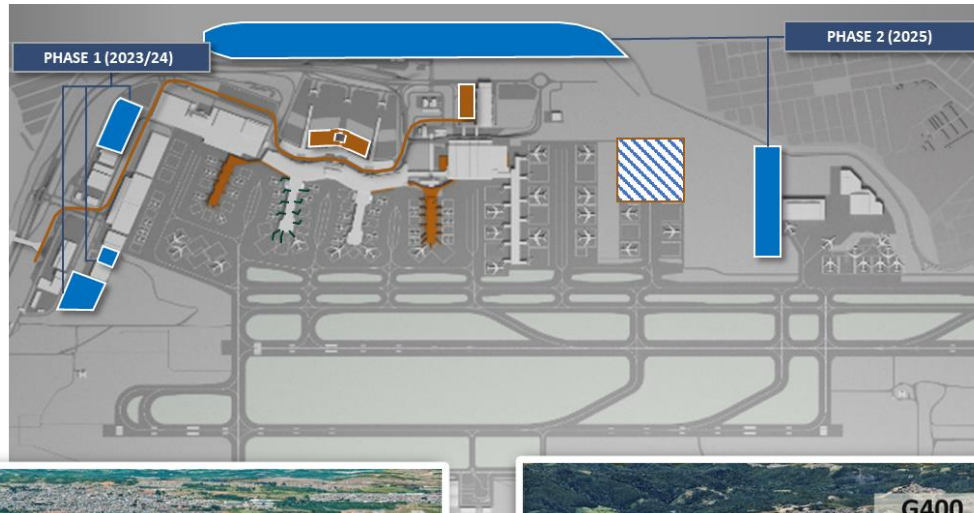
STAKEHOLDER ENGAGEMENT

CONNECTIVITY

INFRASTRUCTURE



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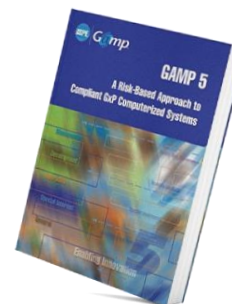


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QUALITY OF SERVICE



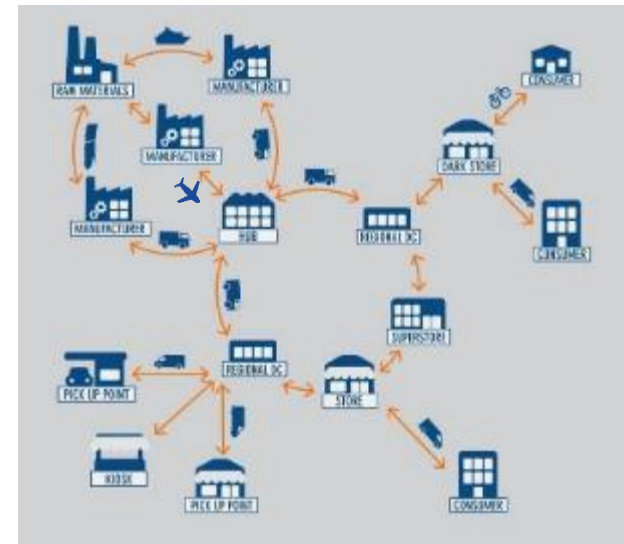
BASED ON THE STRATEGY AND FOCUS THERE ARE MANY THINGS TO DO AND TO PURSUE ... AGAIN NOT A ONE-SIZE-FITS-ALL APPROACH HERE.



REGULATORY



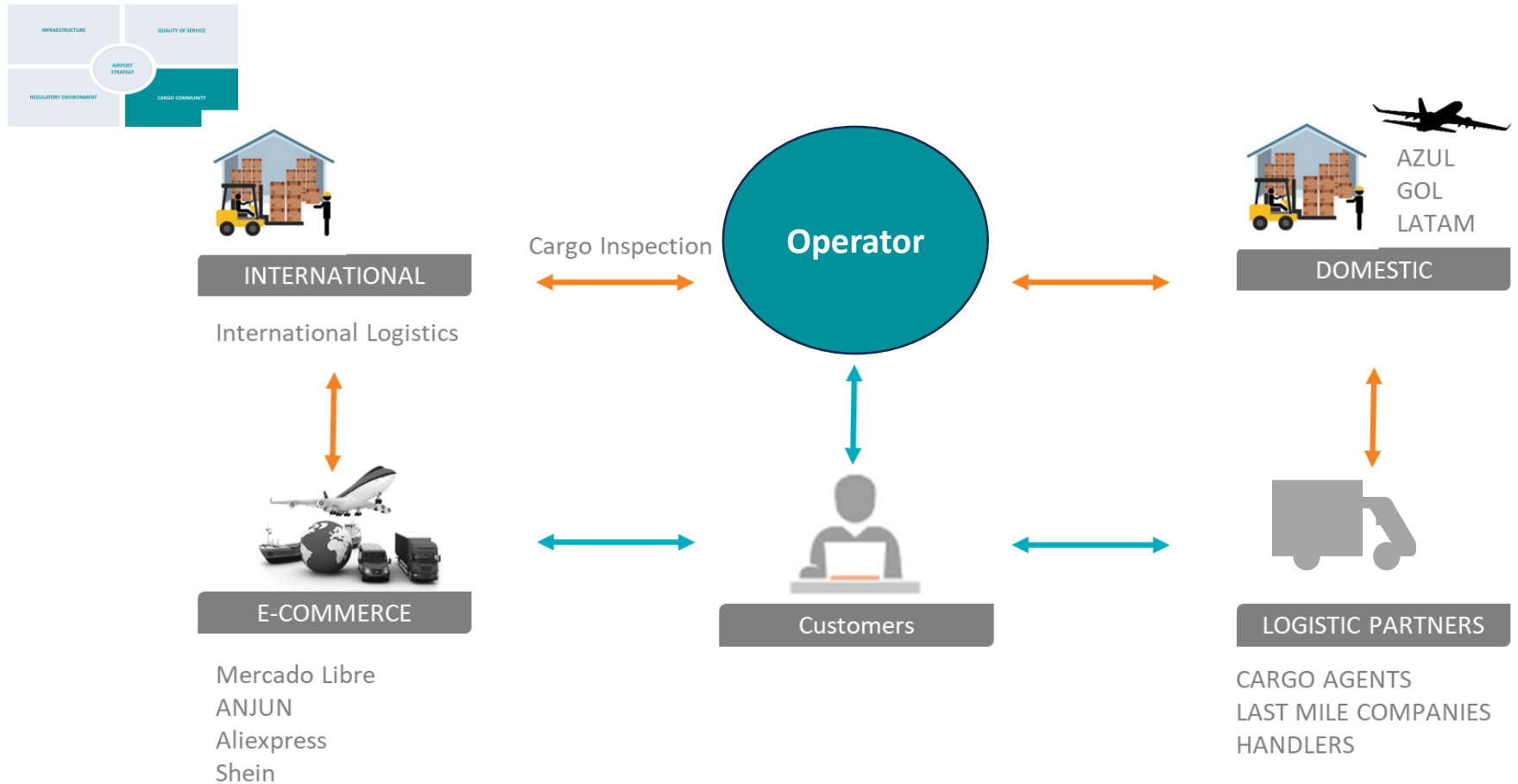
CARGO SECTOR NEEDS TO PUSH FOR AN EASIER, MORE PREDICTABLE, AND LESS BUREAUCRATIC SYSTEM THAT IS HAMPERING THE GROWTH POTENTIAL.



CARGO COMMUNITY



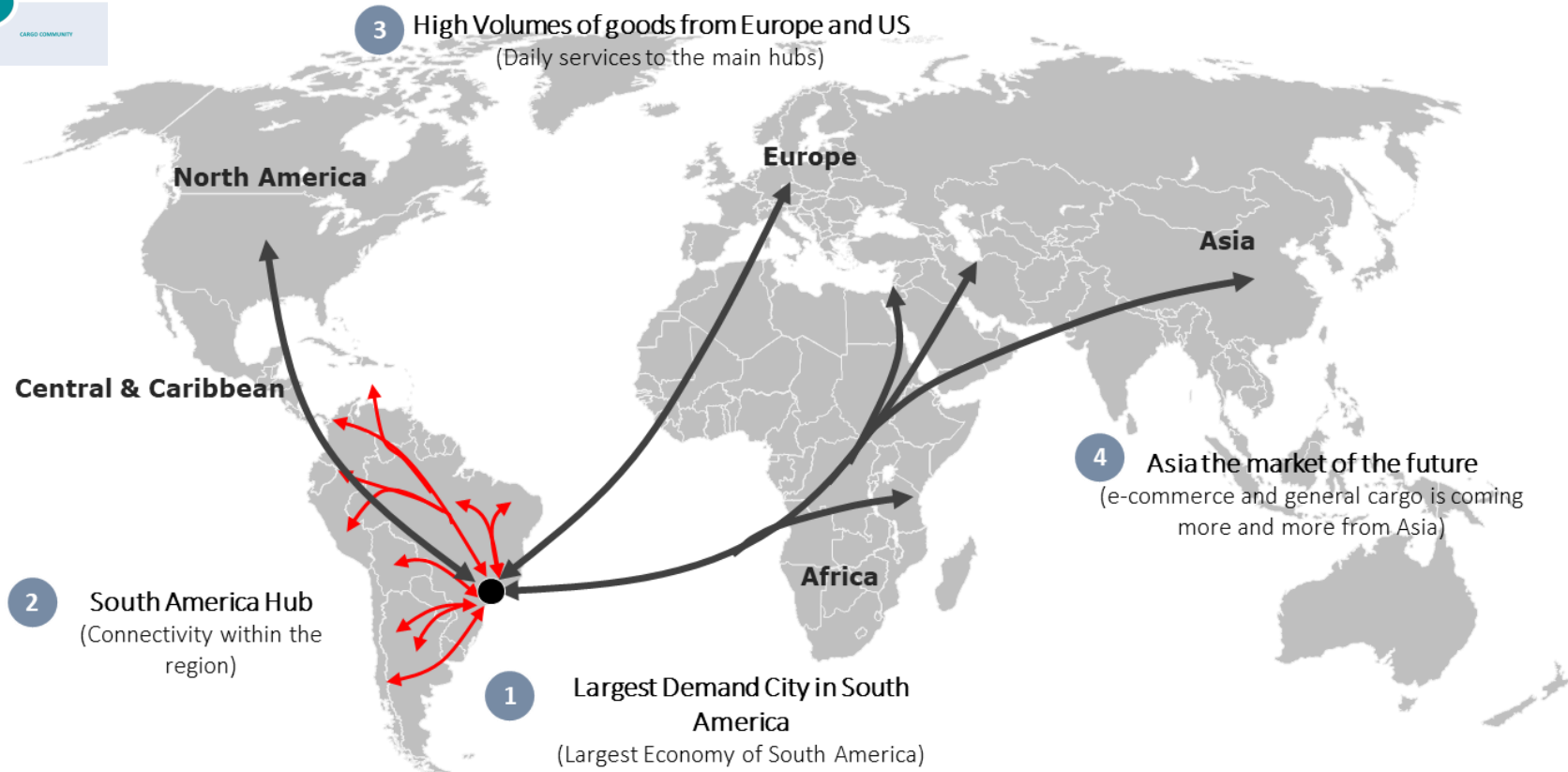
EVERYONE WITH THE SAME MINDSET – DISCUSSIONS ARE INEVITABLE BUT UNDERSTANDING THE COMMON GROUND MAKES IT EASIER AND FASTER.



THE AIRPORT STRATEGY



AIRPORTS HAVE THEIR STRATEGY AND THIS IS IMPORTANT – MORE INVESTMENT WILL COME IF THE STRATEGY IS CONSISTENT AND WITH A CLEAR VISION.



KEY MESSAGES



SOUTH AMERICA IS A UNIQUE PLACE FULL OF OPPORTUNITIES BUT ALSO UNIQUE CHALLENGES – ROBUSTNESS AND RESILIENCE ARE KEY.

REGION IS FULL OF OPPORTUNITIES

- There are no replacements to reach deep LAC than aviation.
- Wide, Narrow and Regional all have their share and their importance for the region.

DEFINE THE COMMON GROUND

- Cargo Communities are important elements to communicate, discuss and engage;
- Stronger industry leads to efficient processes;

ADAPT AND EVOLVE

- Markets change rapidly and so must the airports change – be flexible;
- E-commerce is 1 opportunity but the only opportunity;

KEEP THE CORE BUSINESS

- Understand the strong elements of your position and make them even stronger;



GRU AIRPORT

cargo