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Take your business to new heights *faster* at the

RTA AIRLINE CEO FORUM

Presented by  Raleigh-Durham
Airport Authority

Featuring **Pedro Heilbron**, CEO of Copa Airlines

CopaAirlines 

A STAR ALLIANCE MEMBER 

Friday, April 19 | The Umstead Hotel and Spa | **#COPAxRTAForum**





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Welcome

Jay Irby
First Citizens Bank
RTA Chair 2024

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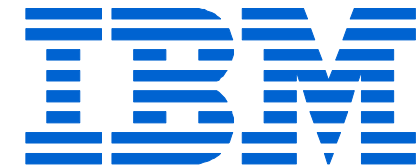
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Joe Milazzo II, PE
RTA Executive Director

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RTA Airline CEO Forum Agenda

- Welcome
- RTA overview
- RDU update and keynote introduction
- Feature presentation: Pedro Heilbron, CEO, Copa Airlines
- Interactive Q&A
- Final remarks and adjourn

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About the RTA

Voice of the regional business community on transportation since 2002.

RTA is a private-public partnership that drives consensus and action through focus and cooperation between the regional business community and our elected and transportation leaders.

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Accelerated Metropolitan Mobility strategy

1. Identify sustainable funding for RDU Airport
2. Advance enhanced regional transit system
3. Promote rapid relief freeway improvements
4. Support mobility innovations and pilots
5. Modernize revenues for highways and streets

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Shaylah Nunn-Jones

Shaylah Nunn-Jones

Novo Nordisk Pharmaceuticals Industries, LP
RTA Air Service and Infrastructure Chair

Accelerated Metropolitan Mobility strategy

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Shaylah Nunn-Jones

June 28, 2023

Hon. Pete Buttigieg
Secretary, U.S. Dept. of Transportation
1200 New Jersey Ave, SE
Washington, DC 20590

Dear Secretary Buttigieg:

I am writing to thank FAA for your leadership on aviation in America, and for your recent environmental approval for the replacement of the primary runway, 5L-23R, at Raleigh-Durham International Airport (RDU).

I am also writing to thank you for your recent federal funding support for the reconstruction of the primary runway at RDU, and to support a request from our partners at RDU for additional federal funding, up to \$400 million in total, to replace, relocate, and lengthen the primary commercial service runway, 5L-23R, at RDU.

As of July 2023, RDU is America's fastest growing airport, with the highest increase in seat capacity year-over-year among all major airports in the US. RDU has added 20 nonstop destinations since February 2023.

The Research Triangle region will grow by nearly one million people by 2040, and RDU's catchment area will increasingly serve all of them.

However, even with North Carolina's excellent state support for airports, our local and airport fee increases will not be sufficient to fund the airside capital infrastructure needed to support our region's air service demands.

We request that FAA provide a letter of intent for a 75% federal grant of the total \$500+ million runway cost so that RDU can continue to serve the national commercial aviation system and as a statewide economic engine.

Thank you for considering this request, and for your ongoing service to our nation.

Sincerely,
(your name, title, company)

cc:
Polly Trottenberg
Shannetta R. Griffin, P.E.

Shaylah Nunn-Jones



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RDU Airport Authority – update

Ellis Hankins

Chair, Raleigh-Durham Airport Authority

RDU Welcomes Copa Airlines



J.D. POWER RANKS

RDU TOP 5 LARGE AIRPORT

IN NORTH AMERICA
FOR 2023



Raleigh-Durham
International Airport

2023 Year in Review



NEW RECORD

RDU WELCOMED
14.5 MILLION
PASSENGERS IN 2023



4
New
Airlines



49
New
Routes



25
New
Destinations



Building for the Future

The Vision 2040 master plan for growth will transform the RDU airport campus with \$3 billion in projects over the next 10 years.



GROUND BREAKING CEREMONY
RUNWAY 5L/23R
October 2023



GROUND BREAKING CEREMONY
RUNWAY 5L/23R
October 2023



GROUND BREAKING CEREMONY
RUNWAY 5L/23R
October 2023



RDU Welcomes Copa Airlines



RDU Airport Authority – update and keynote introduction

Michael Landguth
President and CEO
Raleigh-Durham Airport Authority

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Keynote presentation

Pedro Heilbron
Copa Airlines
CEO



June 2024

 Raleigh-Durham

 Florianópolis

 Tulum



Copa Airlines

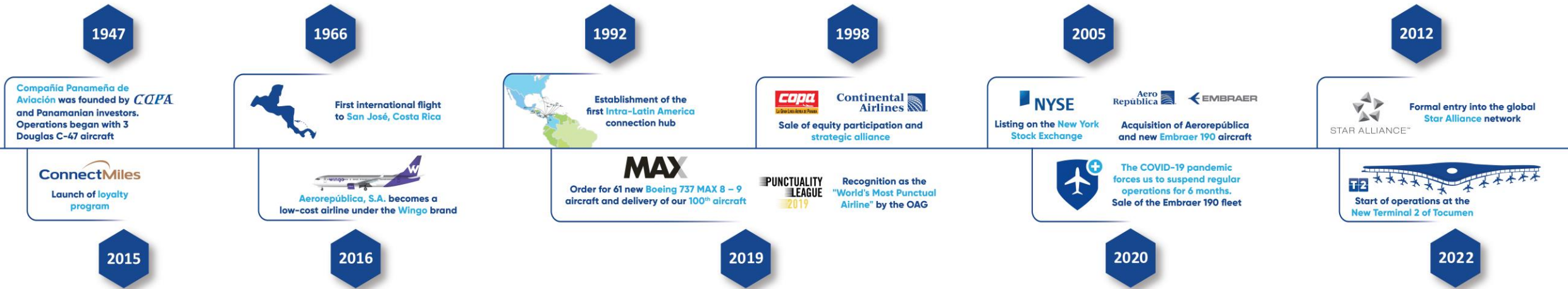
The RTA Airline CEO Forum

April 19, 2024



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Historic Evolution



Copa Holdings

- **+400 daily flights**
- **Fleet of 117 aircraft**
 - 77 Boeing 737NG
 - 40 Boeing 737 MAX
- **Hub of the Americas® based in Panama City, Panama**
 - 85 destinations in 32 countries
- **Transitioned Colombia business unit to branded low-cost model: Wingo**
 - Since December 1, 2016
 - 9 Boeing 737-800NG densified
 - Point to point service
 - Focused on ultra low-cost market and direct sale

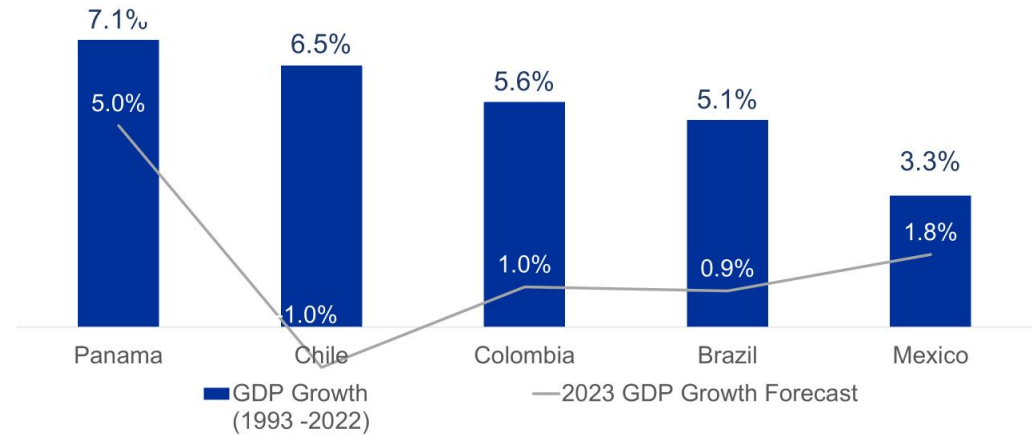


Panama: International business hub and high growth rates

GDP growth in 2023 exceeded that of other countries in the region

- Logistic and Business regional hub
 - Largest container ports in Latin America
 - Free Trade Zones
- Strong private and public investments
 - Expansion of the metro transportation system
 - 4th bridge over the Panama Canal
 - New terminal at Tocumen International Airport (T2)
 - New cruise terminal in the Pacific
- Regional hub for multinational corporations (+170) and international organizations

GDP estimated growth for selected Latinamerican countries



Copa's Business Model



Best Geographic Position

~80% markets with less than 20 PPDEWs

Markets that need a hub



Right infrastructure



World Class Product

Best geographic position

The Panama hub serves the highest number of non-stop international destinations in the region

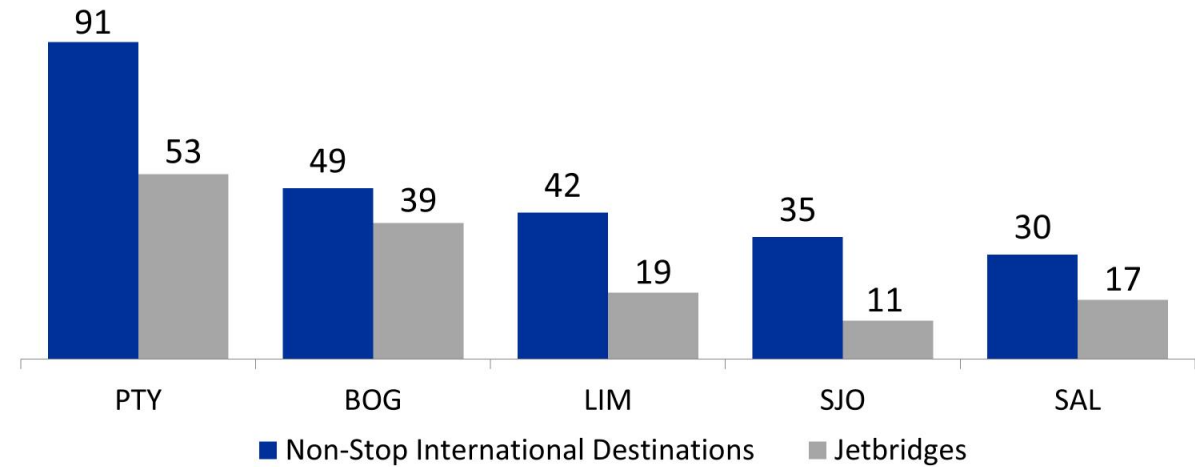
- Due to its geographical location, Tocumen International Airport in Panama City serves as a natural hub connecting the Americas.
- Copa has capitalized on Panama's advantageous geographical position by developing the Hub of the Americas[®], offering the highest number of flights and international destinations in the region.
- The connectivity provided by Panama from Tocumen International Airport has been a driving force behind regional integration



Right Infrastructure – Hub of the Americas®

In 2022, Tocumen Airport inaugurated its second terminal with 20 additional boarding gates, which will support capacity growth

- 2 sea-level runways
- More international boarding bridges than competing hubs
- The only airport in Central America with connection to the city's Metro system



World Class Product

9th year as the most punctual airline in Latin America according to Cirium

World Class Service

- Winners of “Skytrax World Airline Awards” for the 8th time
- APEX 5 Star Airlines
- 15th in Conde Nast's 2023 Reader Choice Award



On time Performance Leadership

- 2023 'Most punctual airline in Latin America' by Cirium
- 2023 OAG winners of the Latin America Punctuality League



DREAMS Business Class product that enhances the experience on long-haul flights

Star Alliance – Global premium alliance

Source: Skytrax, Cirium and Copa

Copa Airlines: On-time Performance within 14 mins of scheduled arrival time

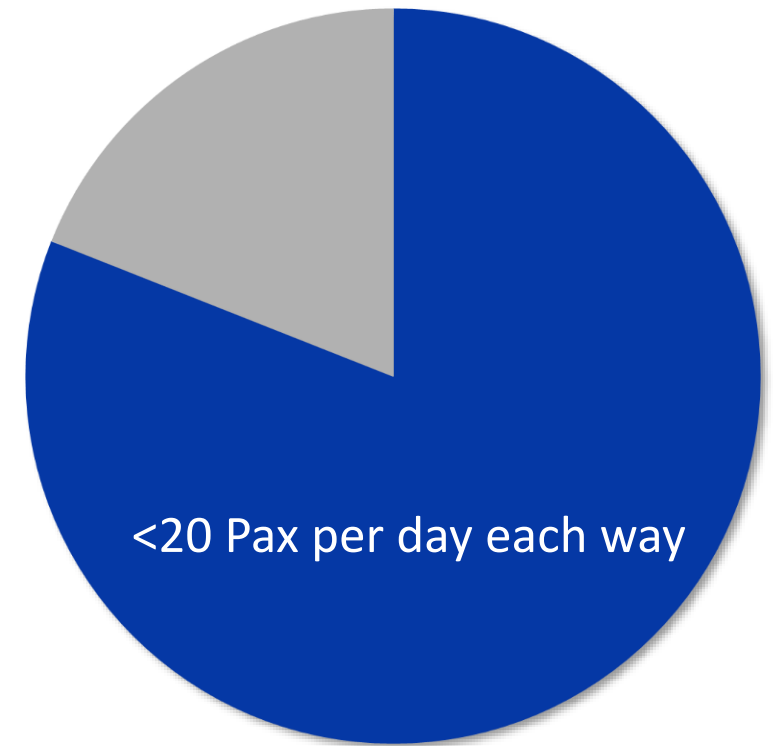
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Markets that need a hub

~80% of the markets we serve have fewer than 20 passengers per day in each direction

- The network of connections serves multiple small markets with limited connectivity in the region.
- Most city pairs in Latin America cannot sustain point-to-point service.
- Copa's extensive network is, in many cases, the most convenient option



The Hub of the Americas®

Offers the best connectivity in the region



Hub of the Americas®

85 Destinations
32 Countries
364 Daily flights

* June 2024

Source: Copa Airlines - Planning

Why Raleigh-Durham?

- Only non stop Service to Central/South America from fast growing and centrally located research triangle area
- Convenient – gate to gate - connections at Copa’s Hub of the Americas® to 65 cities in Central, South America and the Caribbean
- RDU is the 16th destination served by Copa in the US. Strong and growing Latin American community
- Important academic hub for Latin American region
- Daytime Schedule to better serve The Triangle and surrounding cities and towns

Copa's plan is to continue growing in daily flights and passengers...

Daily Flights

2023

We surpassed the number of passengers compared to 2019

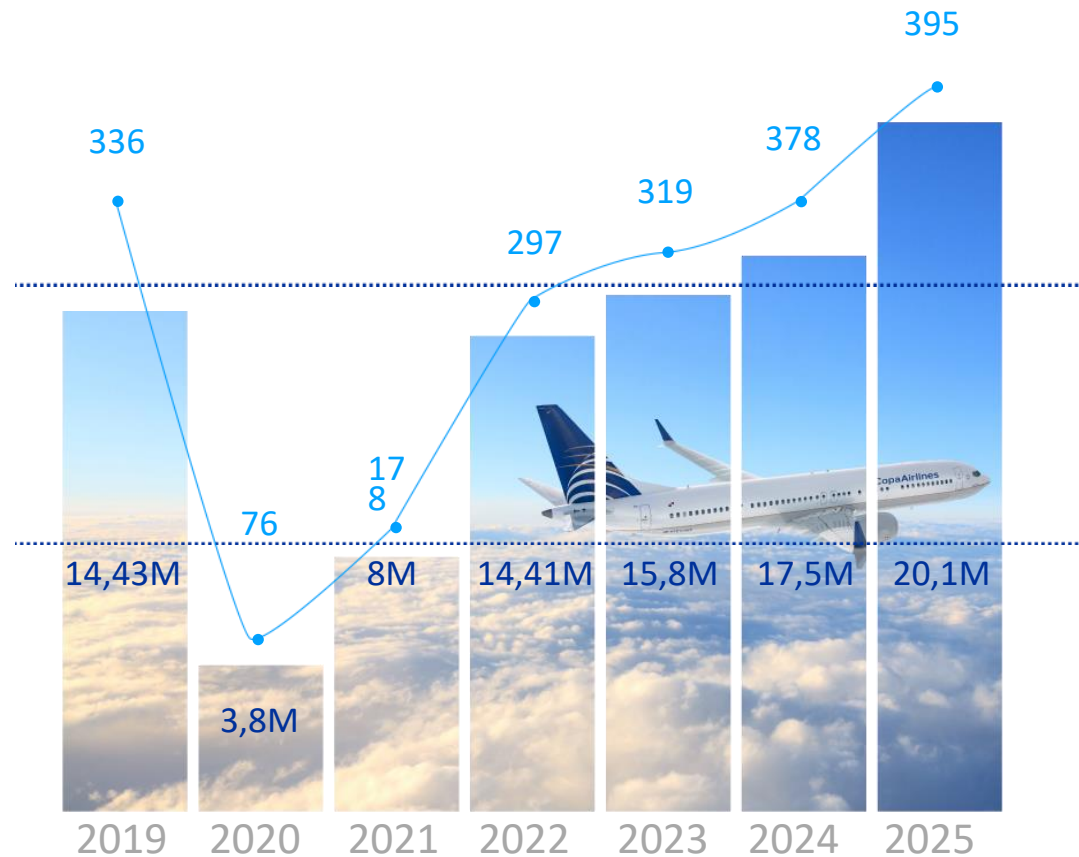
2024

We now have more daily flights vs 2019

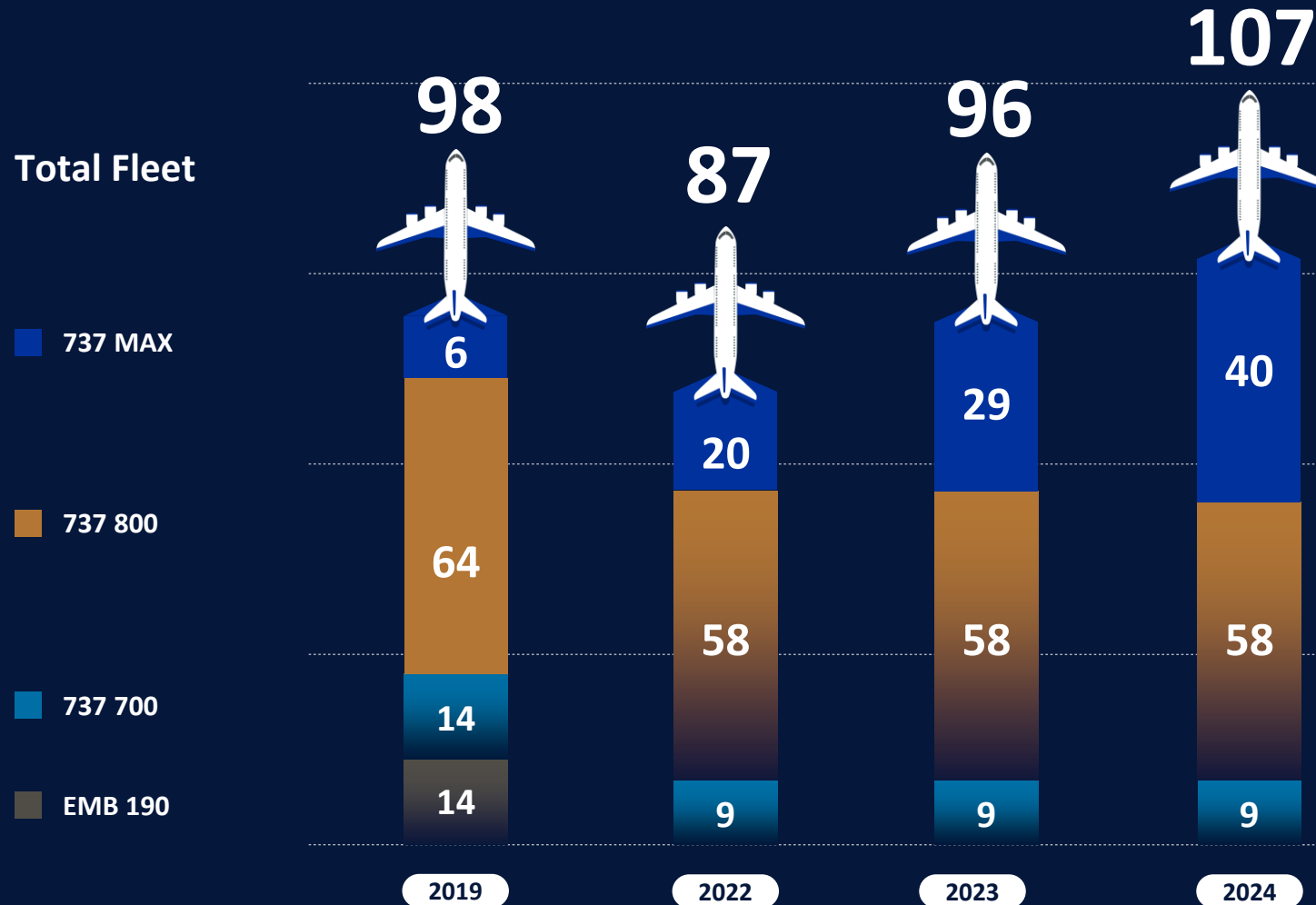
2025

27% more passengers and 11% more daily flights vs 2023

Passengers



...while investing in fleet growth



2023 – 2028: Order of Boeing aircraft with an average of 12 new deliveries per year with an annual investment (at list price) of \$1.7 billion.

Going Forward

- The Hub of the Americas® and Copa Airlines have a significant impact on Panama's economy, a country that benefits from international connectivity.
- Copa is committed to continue its investment in new aircraft and international connectivity to maintain Panama's leadership in the region, creating more jobs and greater opportunities for the country's economy.
- The new RDU flight fits Copa's purpose, connecting this very dynamic and fast growing region with Panama and the rest of Latin America

**We invite you to enjoy the wonders of
Panama...**



Thank you.



Keynote presentation

Pedro Heilbron
Copa Airlines
CEO

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Closing remarks

Jay Irby

First Citizens Bank

RTA Chair 2024

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Next event: RTA 2024 Transportation Brunch – August 6, 2024

www.letsgetmoving.org/brunch

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