



Route Development process in OMA
 Grupo Aeroportuario Centro Norte (OMA)

November 2008



Our Airports

OMA operates and manages 13 airports in 9 different States of Mexico. Our airports are divided in 4 categories depending on their traffic type: Metropolitan, Touristic, Regional and Border.

METROPOLITAN	Monterrey
Passengers 44%	
TOURISTIC	Acapulco Ixtapa-Zihuatanejo Mazatlán
Passengers 21%	
REGIONAL	Chihuahua Culiacán Durango San Luis Potosí Tampico Torreón Zacatecas
Passengers 29%	
BORDER	Ciudad Juárez Reynosa
Passengers 7%	

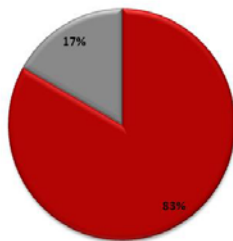




Aéroports de Paris Management (ADPM) is a branch of ADP, it is responsible for the operation of Orly and Charles de Gaulle Airports in Paris. ADPM is the most important airport operator in the Continental Europe, handles 82 million passengers and 1.9 million tons of cargo.

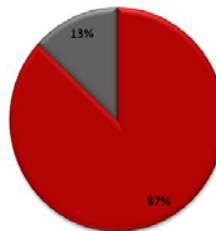


Dedicated to infrastructure development, construction and operation. ICA has become the largest construction company in Mexico. It is a major infrastructure operator, manages and operates municipal services, expressways among other important projects with an outstanding background in airport construction.



Total passengers 15,141,241

Total operations 424,057



■ National ■ International

Route development



Phase I

- › Analysis of potential markets, passengers from Sabre (MIDT) and IATA. (hard data)
- › Analysis of the main drivers that determines the demand for air travel. (economic, touristic, etc.)
- › Airline and aircraft type knowledge. (traditional, LCC, regional)
- › Understanding of the airline industry.
- › Selecting the airline that best meets your passengers type.
- › Bilateral agreements.

Phase II

- › Presentation to the airline has to be clear and to prove there is a potential market. (tailor made)
- › Passengers characteristics should be highlighted. (High or low yield)
- › Recommendations of a schedule most of the times are welcome.
- › An incentive package should be given.
- › Sometimes best results are achieved by working with the local government, the touristic entity and the airport.

RESULTS

Route development



- › Routes that have been develop together with airlines or that received an incentive during 2007 and 2008.



Route development



› There are 140 passengers daily each way (PDEW) between Monterrey and Latin America.

RANK	CIUDAD	2007	2008	VAR (%)	PDEW
1	Buenos Aires	9,325	9,386	1%	22
2	Guatemala	3,640	6,832	88%	16
3	Sao Paulo	5,928	6,129	3%	14
4	Caracas	5,707	5,692	0%	13
5	Bogota	4,341	5,123	18%	12
6	Costa Rica	4,121	4,884	19%	11
7	Santiago	3,818	4,011	5%	9
8	Panamá	2,528	3,958	57%	9
9	Managua	1,905	2,766	45%	6
10	Lima	2,059	2,743	33%	6
11	San Salvador	1,764	2,157	22%	5
12	San Pedro Sula	824	1,652	100%	4
13	Río de Janeiro	814	907	11%	2
14	Quito	912	818	-10%	2
15	Guayaquil	589	614	4%	1
16	Medellín	499	546	9%	1
17	Beilo Horizonte	355	471	33%	1
18	Cali	322	395	23%	1
19	Tegucigalpa	323	387	20%	1
20	Porto Alegre	217	317	46%	1
TOTAL		49,991	59,788	20%	140

Fuente: IATA

Route: Monterrey – Panamá
 Airline: COPA Airlines
 Equipment: B737-700 (124 asientos), ERJ-190 (94 asientos)



Route development



“Network Latin America” Monterrey, December 2007

Network Latin America
 Bringing airlines and airports together

› OMA was the first airport group to establish the “Network Latin America” event together with the Flight Group. This event was held in Monterrey, Mexico during the 3rd and 4th of December 2007.

› “Network Latin America” is the first route planning event in the region bringing airlines and airports together. The main purpose of this event is to present to airlines business cases and to meet airline planners.

› This year the venue will be in Aruba during the first weekend of December.





Thank you



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