

# FROM CARTAGENA TO CALI: EXPLORING COLOMBIA'S AVIATION GROWTH STORY

WEDNESDAY 22 OCTOBER



WEBINAR

© 2025 OAG Aviation Worldwide Limited. All rights reserved



# SPEAKERS

CHIEF  
ANALYST



**John Grant**

Chief Analyst, OAG

With a wealth of experience across the global aviation industry, John provides expert commentary on market developments for OAG, making connections between what the data is telling us and the trends and events occurring in the sector.

GUEST  
SPEAKER



**Valeria Bucheli**

Senior Representative – Head of Aviation, PROCOLOMBIA

Valeria Bucheli is Senior Tourism Representative at PROCOLOMBIA and previously spent five years at Bogotá-based airline Avianca as Charter & New Routes Coordinator (Cargo) and Pricing Analyst (Cargo).

MODERATOR



**Deirdre Fulton**

Partner, MIDAS Aviation

Deirdre is a partner in an aviation consultancy providing meaningful insight and analysis to clients around the world. She works closely with OAG on their data analysis and publications.



**WEBINAR**

© 2025 OAG Aviation Worldwide Limited. All rights reserved

# TODAY'S DISCUSSION

In this webinar we'll be discussing aviation growth story of Colombia.

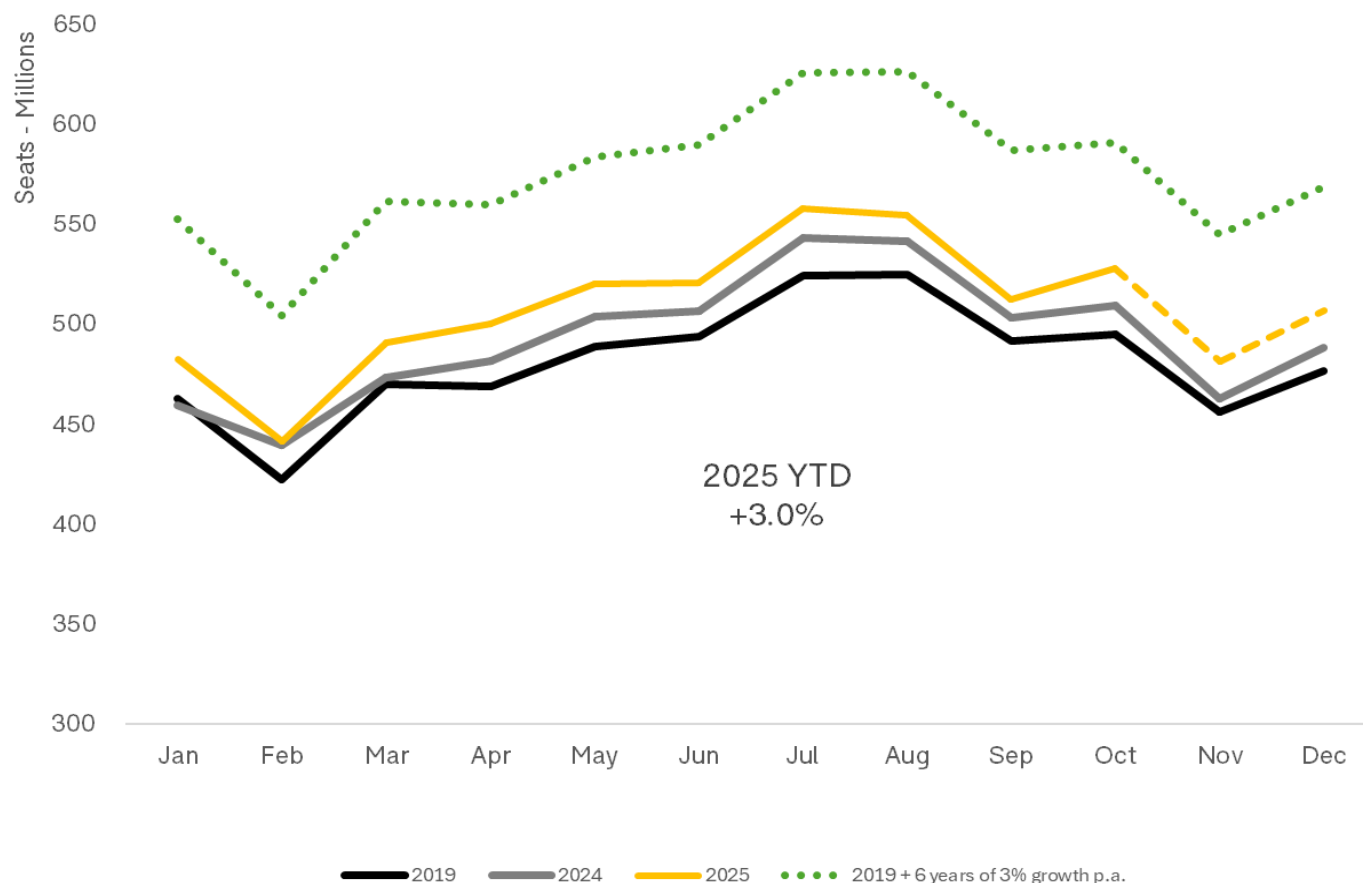
We'll be discussing the following:

- What is driving the rapid growth of air services in Colombia?
- Who is travelling internationally and to where?
- Airline expansion strategies – examining the players, their approaches and the reasons behind them

We'll be taking questions as we go. Please use the chat function to ask your questions



# Global capacity growth remains steady at 3%

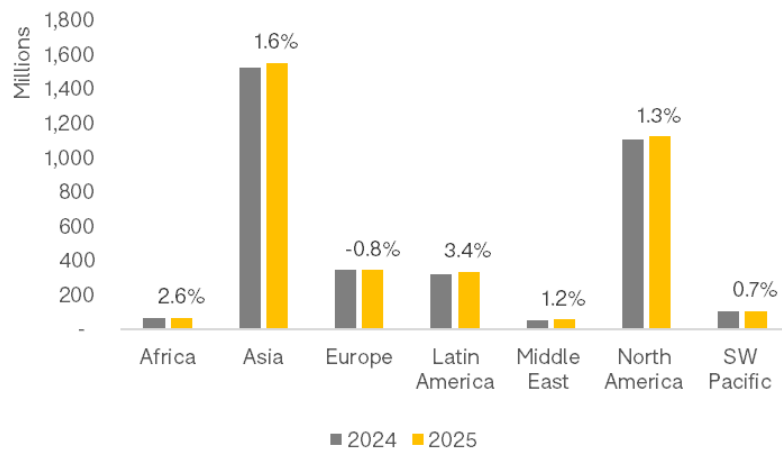


- Capacity growth for the year to date remains steady at 3% ahead of last year

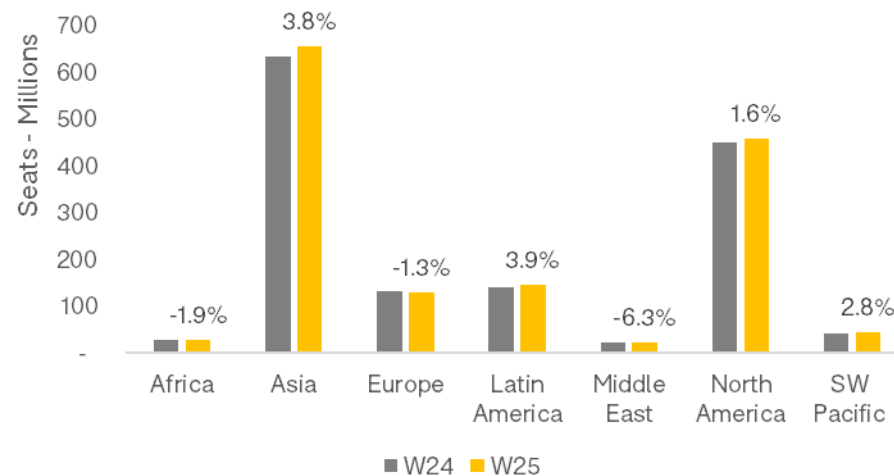


# What does the winter season hold?

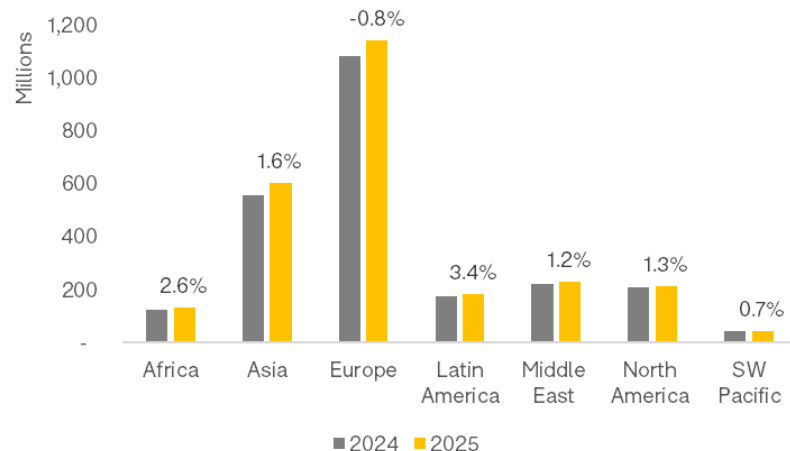
Annual Capacity by Region - Domestic



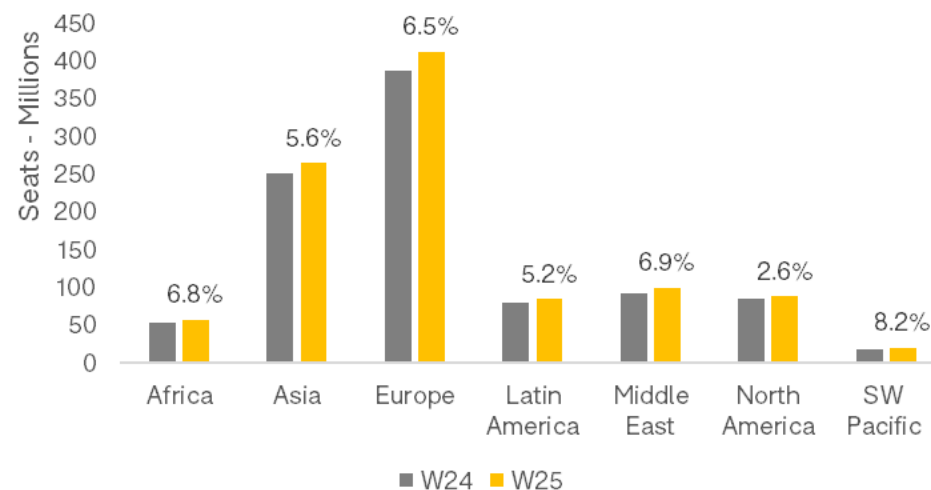
Winter Season Capacity by Region - Domestic



Annual Capacity by Region - International

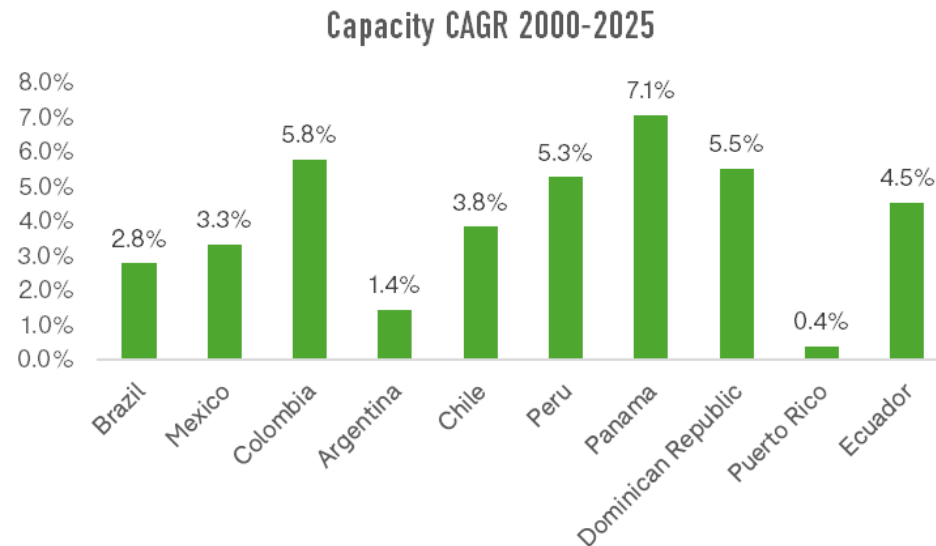


Winter Season Capacity by Region - International



# Context for Colombia

- This month, Colombia is the 23<sup>rd</sup> largest market in capacity terms globally, with 10.7m seats across both domestic and international markets.
- Only Brazil and Mexico are bigger in terms of Latin America competitors, driven by their much larger populations leading to very large domestic air markets.
- Over the last 25 years, Colombia has seen capacity grow at a CAGR rate of 5.8%, second only to Panama, amongst the top 10.

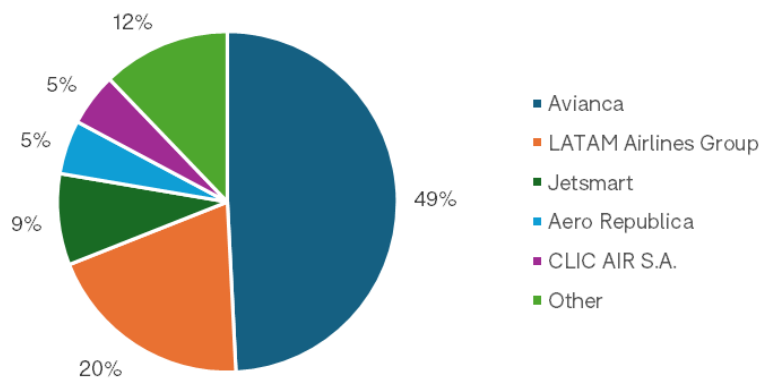


| Rank Oct 2025 | Country              | 2025-10     |
|---------------|----------------------|-------------|
| 1             | USA                  | 210,462,671 |
| 2             | China                | 159,239,253 |
| 3             | India                | 43,449,217  |
| 4             | Japan                | 35,417,154  |
| 5             | Spain                | 33,746,344  |
| 6             | United Kingdom       | 32,802,221  |
| 7             | Germany              | 26,583,877  |
| 8             | Turkiye              | 26,420,731  |
| 9             | Brazil               | 24,857,947  |
| 10            | Italy                | 24,821,596  |
| 11            | Indonesia            | 21,138,969  |
| 12            | France               | 20,328,533  |
| 13            | Australia            | 18,802,066  |
| 14            | Mexico               | 18,156,016  |
| 15            | Russian Federation   | 17,557,790  |
| 16            | Canada               | 17,202,604  |
| 17            | United Arab Emirates | 15,848,003  |
| 18            | Korea Republic of    | 15,418,758  |
| 19            | Thailand             | 15,205,075  |
| 20            | Saudi Arabia         | 14,510,230  |
| 21            | Viet Nam             | 11,827,588  |
| 22            | Malaysia             | 11,694,747  |
| 23            | Colombia             | 10,673,190  |
| 24            | Philippines          | 10,207,095  |
| 25            | Greece               | 9,282,520   |

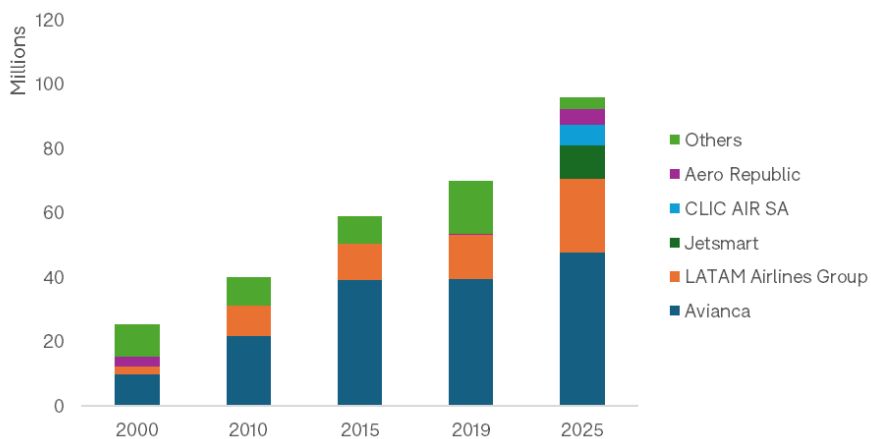


# Colombia's Airline Landscape

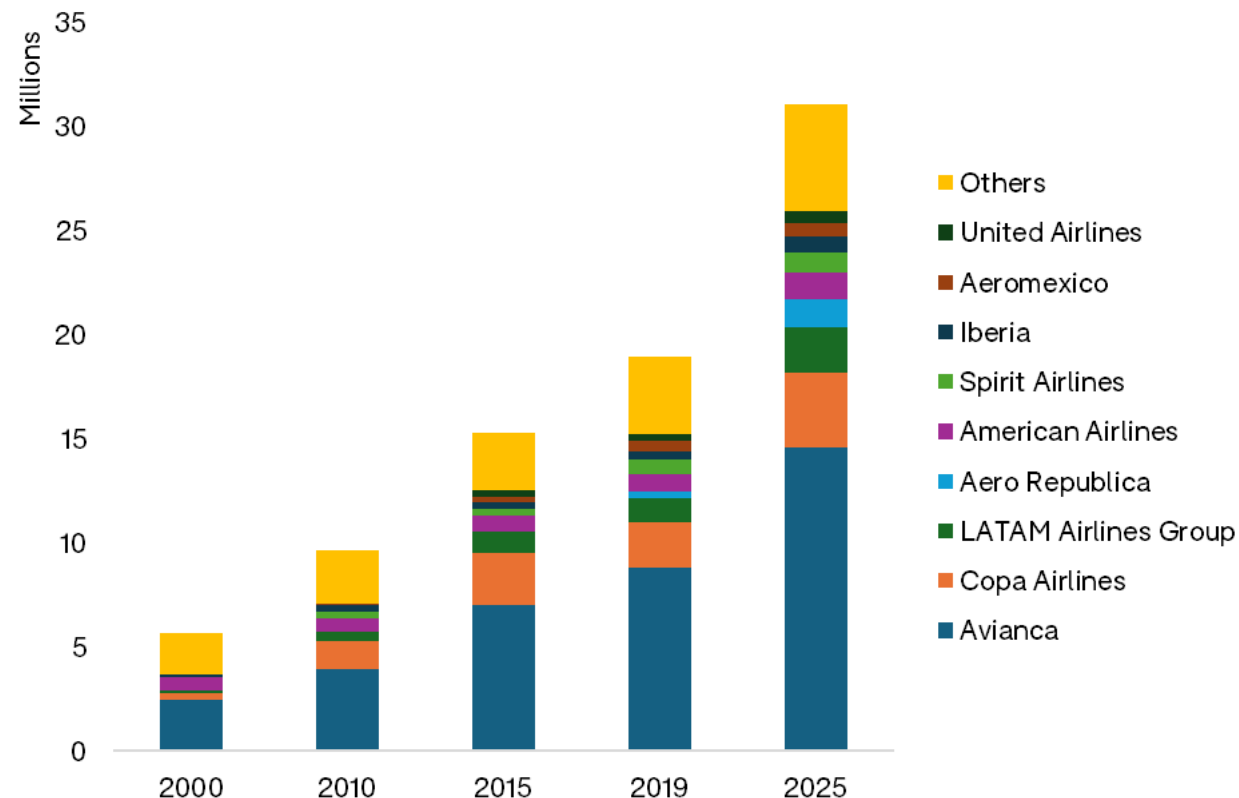
## Top 5 Airlines by 2025 Capacity

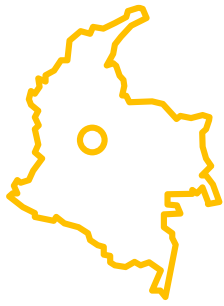


## Colombia's Domestic Capacity by Carrier



## Colombia's International Capacity by Carrier





# PROCOLOMBIA PROMOTES



**INTERNATIONAL  
TOURISM**



**FOREIGN DIRECT  
INVESTMENT**



**NON-TRADITIONAL  
EXPORTS**



**COLOMBIA**   
COUNTRY BRAND

Presence in **32 countries, 33 markets** and **24 regional offices**



**WEBINAR**



# THE COUNTRY OF BEAUTY

Located in the northernmost end of South America, 50 million Colombians are ready to welcome you!

Our strategic location gives us a great catchment area:

- Colombia: 50,3 M
- South America: 425 M
- Mexico + Central America + Caribbean: 170 M
- North America: 360 M

## GENERAL INFORMATION

Official Language: Spanish

Currency: Colombian Peso



Colombia, the country of beauty

# OUR TOURISM REGIONS

✓ **SIX DIFFERENT TOURIST  
REGIONS THAT OFFER THEIR  
OWN MAGIC AND BEAUTY.**

✓ **FROM SOFT SANDY  
BEACHES, REEFS, COLORFUL  
VILLAGES AND INDIGENOUS  
COMMUNITIES, TO JUNGLES  
AND PERPETUAL SNOW  
MAKE UP COLOMBIA'S  
TOURIST OFFER.**



DISCOVER **6 REGIONS**  
WITH UNIQUE CHARM

## GREATER COLOMBIAN CARIBBEAN

MUCH MORE THAN SUN AND SEA



## COLOMBIAN PACIFIC

FLAVORS OF FOREST AND SEA



## WESTERN COLOMBIAN ANDES

MOUNTAINS OF COFFEE AND FLOWERS



## EASTERN COLOMBIAN ANDES

LEGENDARY MOORS AND VALLEYS



## THE COLOMBIAN AMAZON-ORINOCO

SACRED RAINFORESTS AND PLAINS

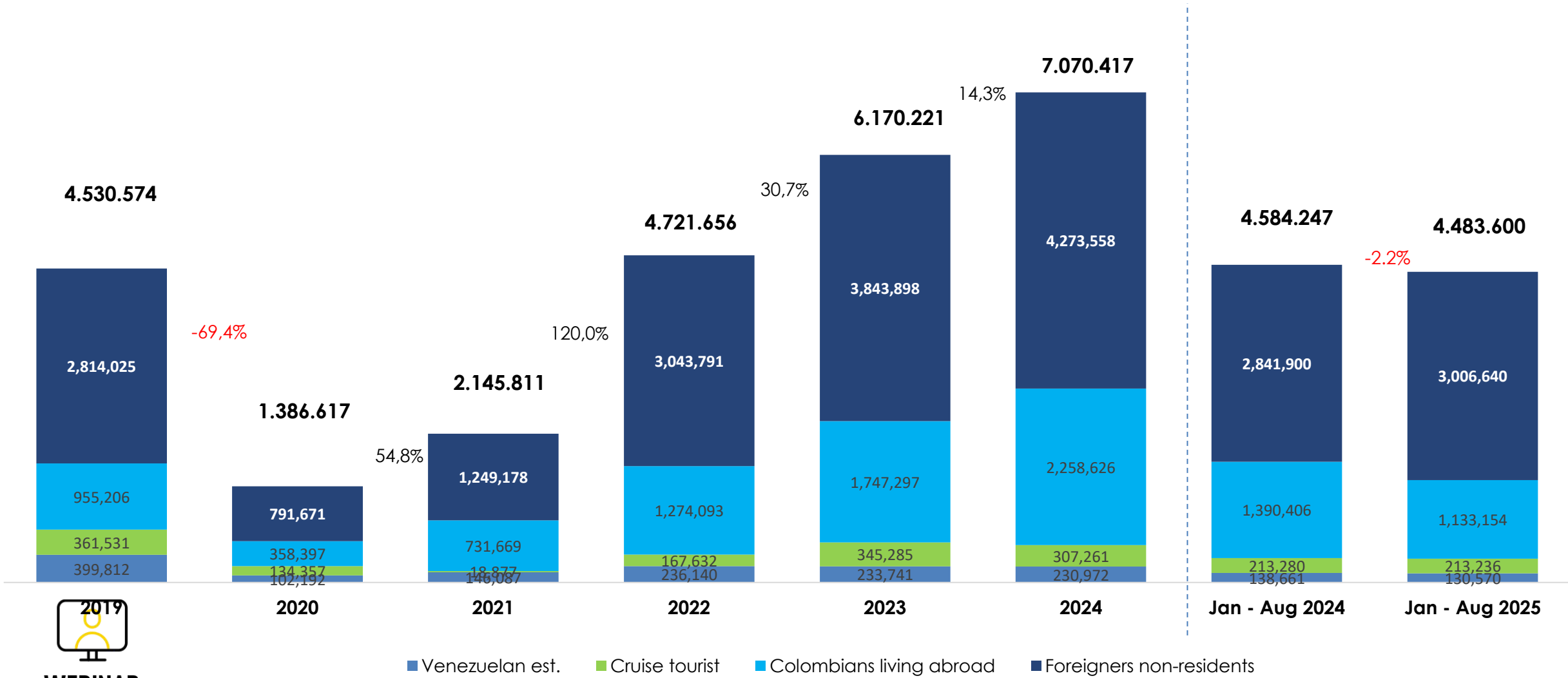


## THE COLOMBIAN MASSIF

ANCESTRAL ORIGINS



# INTERNATIONAL TRAVELERS TO COLOMBIA



Source: MinCIT, Migracion Colombia (provisional figures), ProColombia calculations

# Colombia's Key International Tourism Markets



26,5%



**MX 8,1%**  
365.560



**EC 7,7%**  
348.535



**PE 4,7%**  
212.085



**PA 4,5%**  
203.890



**CL 4,5%**  
200.731

**United States** is the main issuing market with  
1.194.690 foreigner's **non-resident** in 2024

These source  
markets  
continue to  
show the  
same trend **for  
2025.**



WEBINAR

# Main Colombian Destinations 2024-25

## Bogotá



**37,1%**  
1.673.115

## Medellín



**23,3%**  
1.048.471

## Cartagena



**18,9%**  
851.087



**WEBINAR**

# COLOMBIA'S AIR CONNECTIVITY



# COLOMBIA

## A competitive country for the aviation industry



**2<sup>nd</sup> in the region for active air bookings**

between August 2025 and January 2026.

ForwardKeys, AUG 2025



**El Dorado Airport** became **Latin America's busiest airport**, handling **45.4 million** passengers.

OAG, JAN 2025



Colombia ranks **3<sup>rd</sup> in Latin America** for **air capacity**, with **73.7 million seats** in 2024.

OAG, 2025



**July** had the **highest air capacity ever**, with **1.5 million seats** and almost **8,000 flights**.

OAG, JAN-AUG 2025



More than **56,5 million passengers** traveled to/from the country in 2024, **+14,3%** vs 2023.

AEROCIVIL, 2025



In Jan-Jul 2025, **32,6 million passengers** traveled across the country, a growth of **7,9%** over the ones that arrived in 2024.

AERONAUTICA CIVIL, 2025



Colombia had an **11,2% increase in the arrival of foreigner's non-resident** in the country in 2024 vs. 2023.

MIGRACION COLOMBIA, 2025



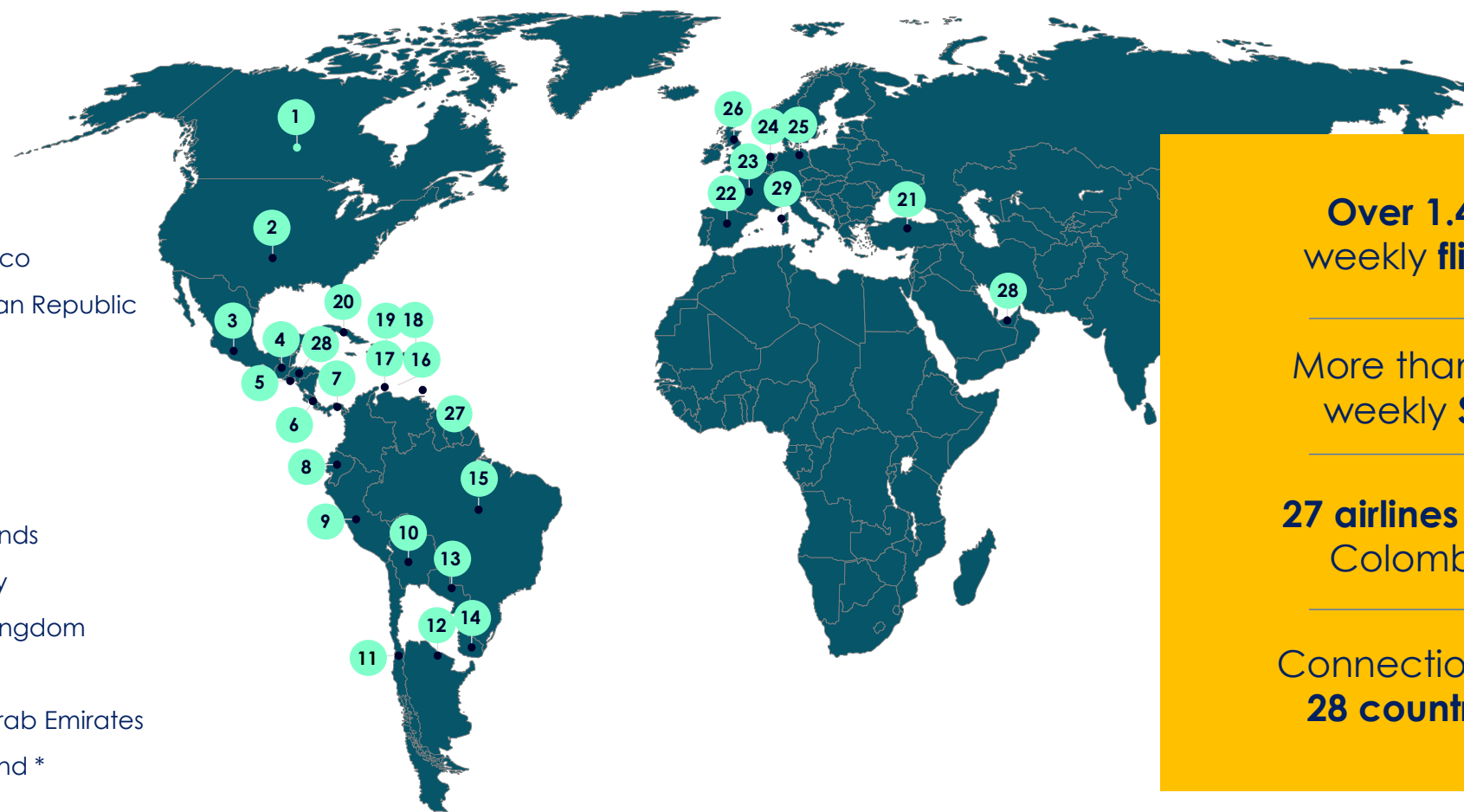
**U.S.A., Mexico, Ecuador, Peru, Panamá and Chile** are the main countries issuing travelers to Colombia.

MIGRACION COLOMBIA, 2025

# INTERNATIONAL CONNECTIVITY

- 01 Canada
- 02 United States
- 03 Mexico
- 04 Guatemala
- 05 El Salvador
- 06 Costa Rica
- 07 Panama
- 08 Ecuador
- 09 Peru
- 10 Bolivia
- 11 Chile
- 12 Argentina
- 13 Paraguay
- 14 Uruguay
- 15 Brazil
- 16 Curazao
- 17 Aruba

- 18 Puerto Rico
- 19 Dominican Republic
- 20 Cuba
- 21 Türkiye
- 22 Spain
- 23 France
- 24 Netherlands
- 25 Germany
- 26 United Kingdom
- 27 Guyana
- 28 United Arab Emirates
- 29 Switzerland \*



Over **1.430**  
weekly **flights**

More than **272 K**  
weekly **Seats**

**27 airlines** fly to  
Colombia

Connections to  
**28 countries**

Colombia has signed **76 air service agreements** with countries around the world

# AIRLINES

## THAT FLY TO THE COUNTRY OF BEAUTY



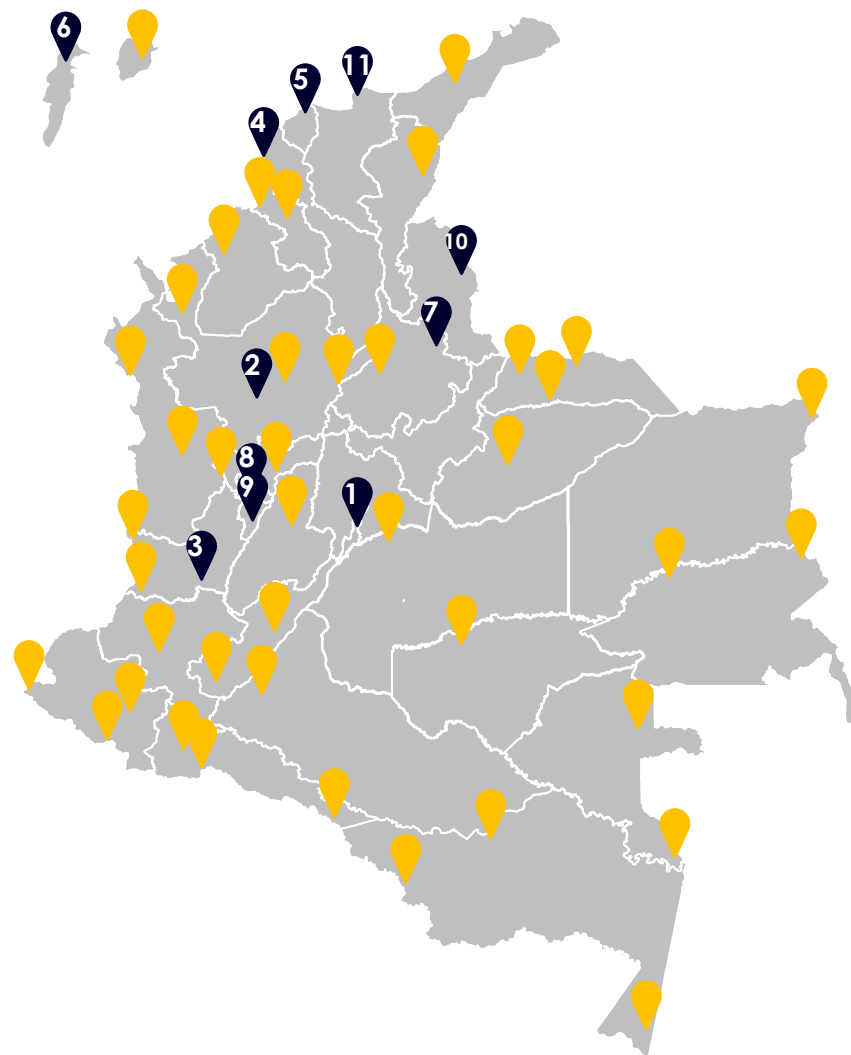
## DOMESTIC AIRLINES



# AIRPORTS

International airports

- 1 Bogotá
- 2 Medellín
- 3 Cali
- 4 Cartagena
- 5 Barranquilla
- 6 San Andrés
- 7 Bucaramanga
- 8 Pereira
- 9 Armenia
- 10 Cúcuta
- 11 Santa Marta



**11  
INTERNATIONAL  
AIRPORTS IN  
SERVICE**

**59  
DOMESTIC  
AIRPORTS**

**70 AIRPORTS IN TOTAL**

15 under concession and 55  
managed by Aerocivil

Source: Aerocivil

## Airports and Operators

are vital for connectivity



# PRESENCE IN ROUTE DEVELOPMENT EVENTS

## ROUTES WORLD

|      |                       |
|------|-----------------------|
| 2020 | Virtual - Reconnected |
| 2021 | Milan, Italy          |
| 2022 | Las Vegas, USA        |
| 2023 | Istanbul, Türkiye     |
| 2024 | Kingdom of Bahrain    |
| 2025 | Hong Kong             |

## ROUTES AMERICAS

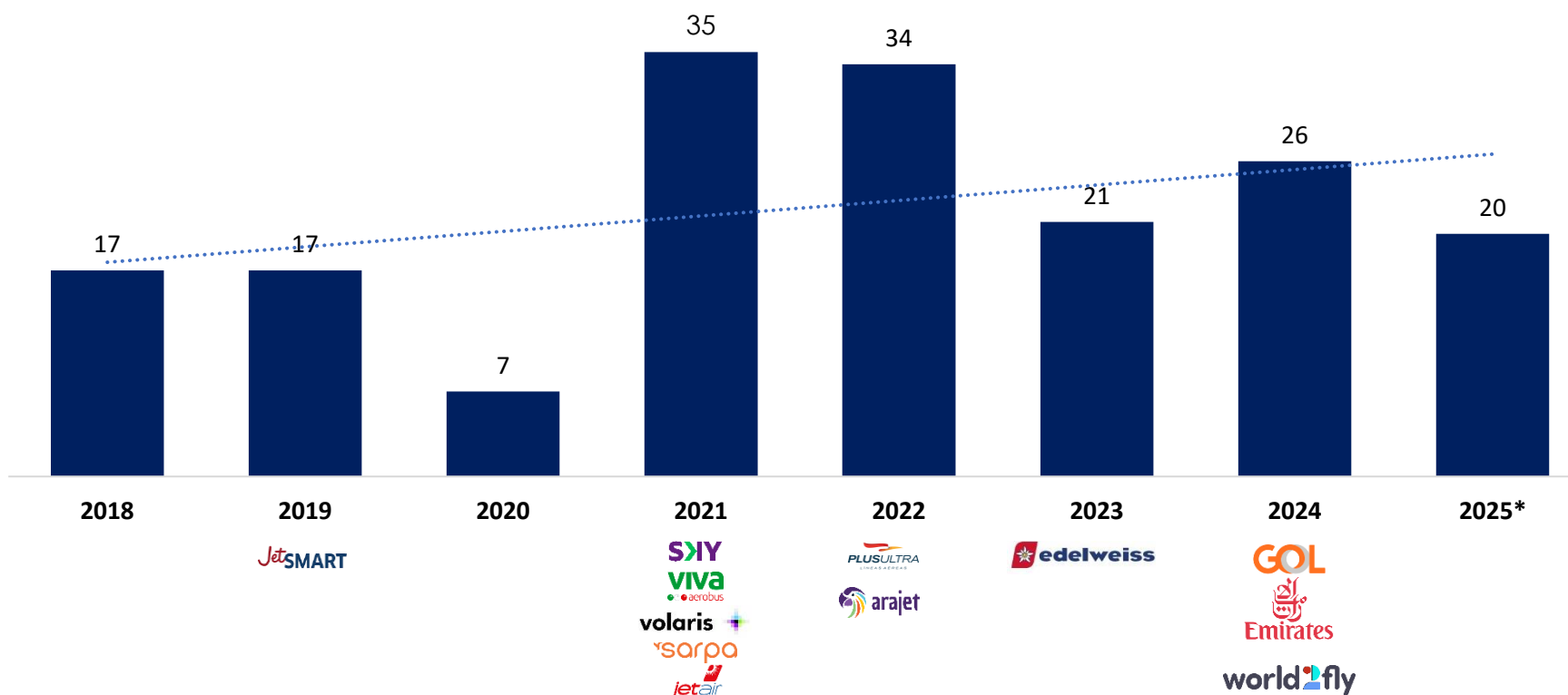
|             |                                   |
|-------------|-----------------------------------|
| 2020        | Indianapolis, USA                 |
| 2021        | Orlando, USA                      |
| 2022        | San Antonio, USA                  |
| 2023        | Chicago, USA                      |
| <b>2024</b> | <b>Bogotá, Colombia</b>           |
| 2025        | Nassau & Paradise Island, Bahamas |



2025 Atlanta, USA

# NEW ROUTES EVOLUTION

## 2018 – 2025\*



The 2025 announcements include:

**21 new routes**  
with **10 airlines**,  
from **10 countries**,  
from **17 international cities**,  
to **4 destinations** in  
**Colombia**

A new route is defined as **the combination of an airline with a route** that previously did not fly.

# PROCOLOMBIA SERVICES

PROMOTION DONE AS A WHOLE WITH ALL THE DESTINATION STAKEHOLDERS



**SEE YOU SOON IN  
COLOMBIA   
THE COUNTRY OF BEAUTY**

 @colombia.travel

 Colombia.travel

 Colombiatravel

 @Colombia\_travel

STAY INFORMED

SIGN UP TO OUR BLOG

<https://www.oag.com/insights>

Contact us via: [contactus@oag.com](mailto:contactus@oag.com) or  
visit [www.oag.com](http://www.oag.com)



WEBINAR