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INTERNATIONAL CIVIL AVIATION ORGANIZATION

A UN SPECIALIZED AGENCY



ICAO Airports and Air Navigation Services Charges Workshop

Doha, Qatar, 28-29 October 2024

STATE OF THE AIR TRANSPORT INDUSTRY

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Economic Regulatory Framework Section

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State of the Industry

Pre-COVID-19
Pandemic

Pandemic
impact

Recovery
overview

Long-term
outlook

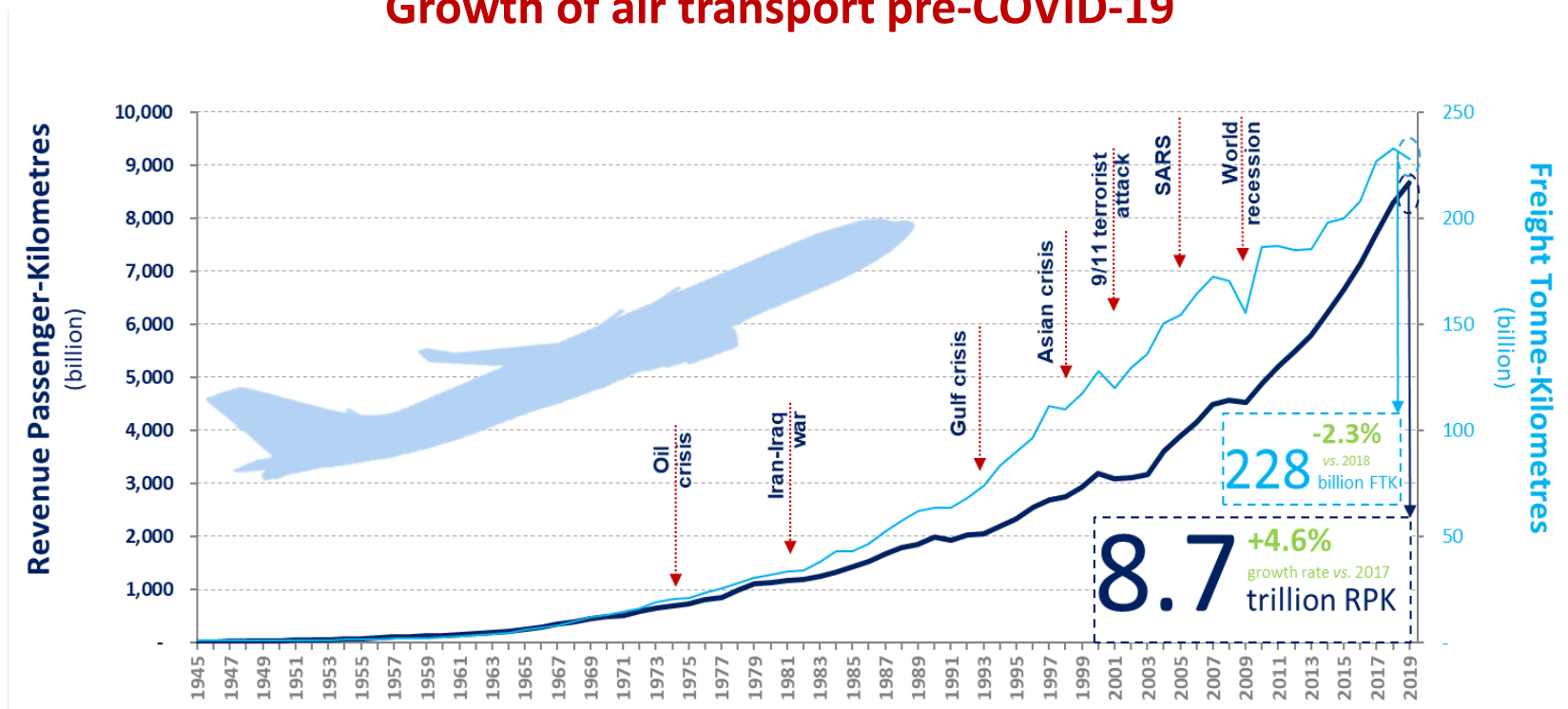


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State of Air Transport Industry - Pre-COVID-19

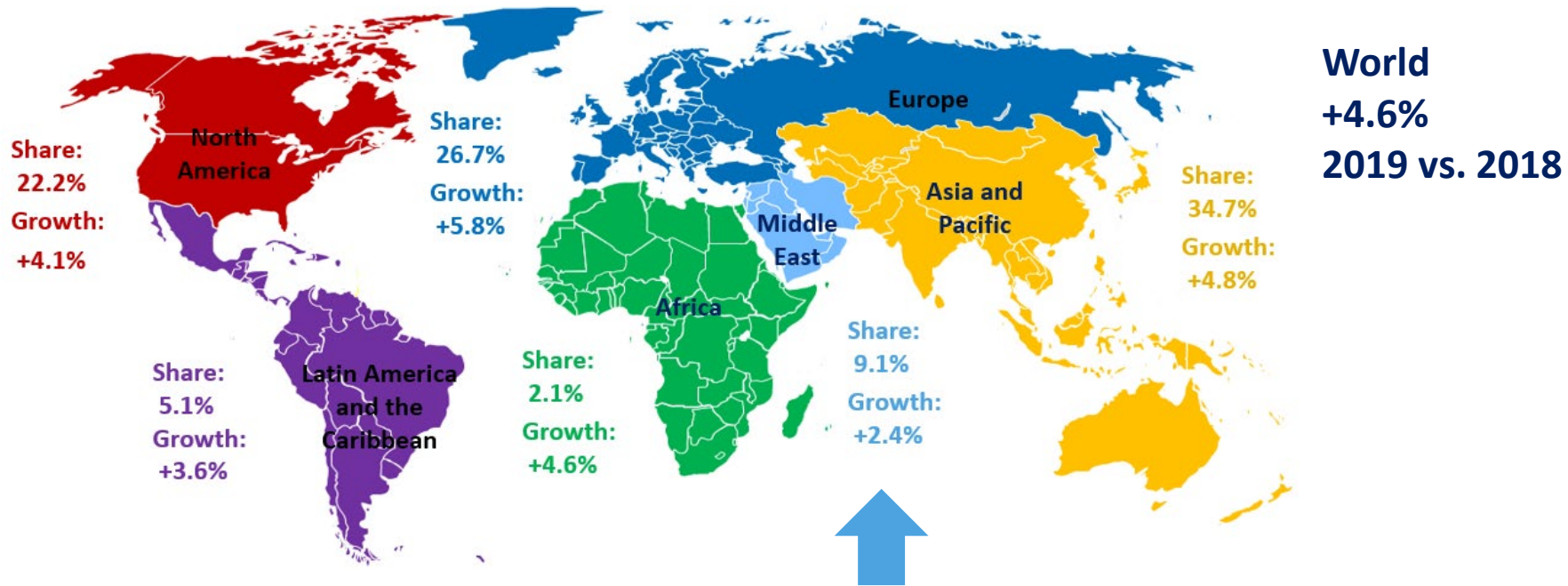
Growth of air transport pre-COVID-19



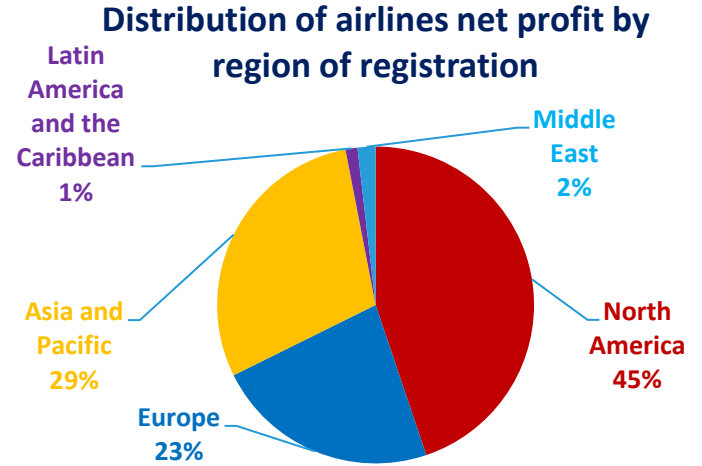
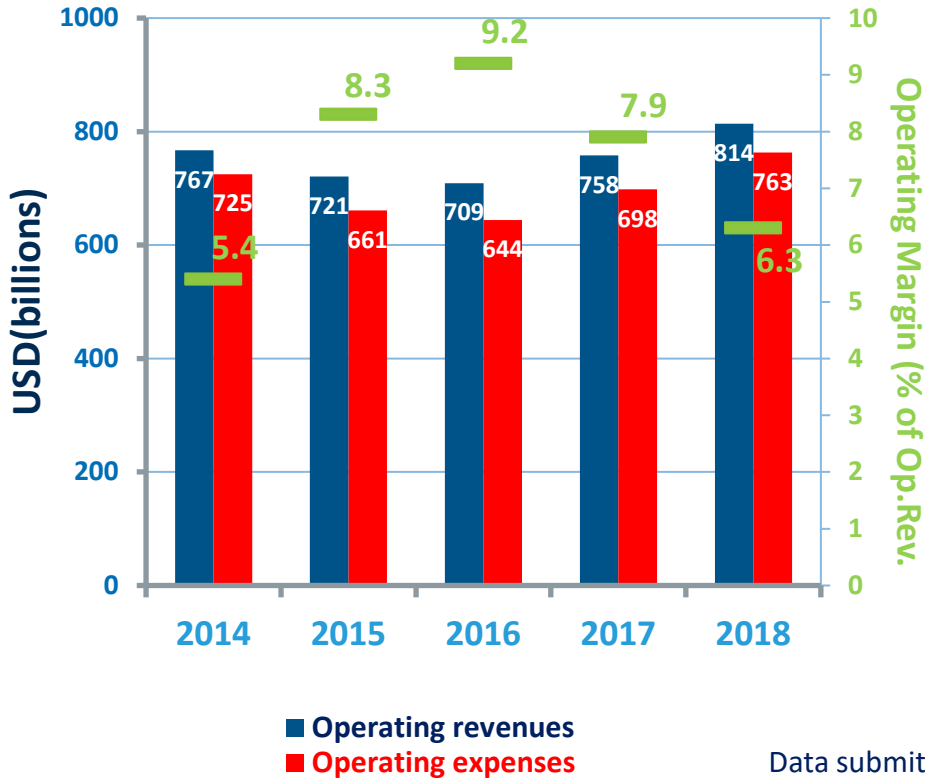


- **38 million aircraft departures**
- **4.5 billion passengers**
- **58 million freight tonnes carried**
- **Over 1 300 scheduled airlines**
- **More than 31 000 aircraft**
- **More than 3 700 airports**
- **170 air navigation centres**
- **360,000 pilots and 86,000 air traffic controllers**

Share of total scheduled RPKs by region (2019)



Airlines financial results (2019)



Mixed results at the regional level, with North American airlines concentrating 45% of the profits of the airline industry

Data submitted by States in accordance with Article 67 of the Chicago Convention



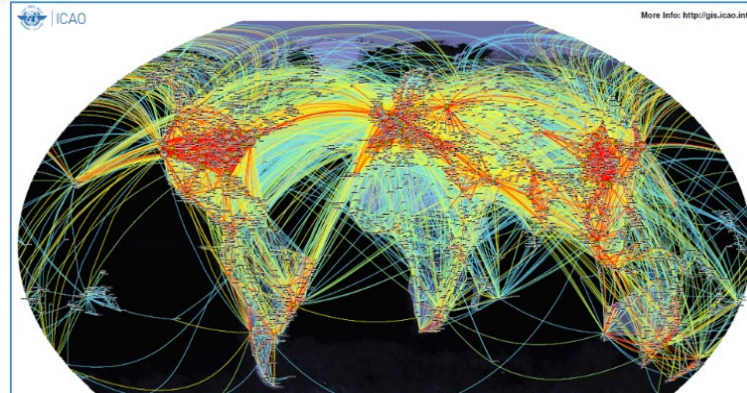
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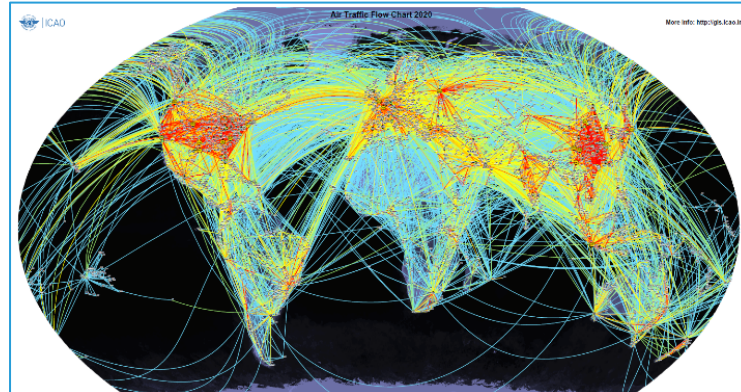
Economic Impact of COVID-19 Pandemic on Aviation

Pandemic Impact on Air Connectivity

Source:
ICAO GIS



2019



2020



World passenger traffic collapses with unprecedented decline in history

World passenger traffic evolution 1945 – 2023





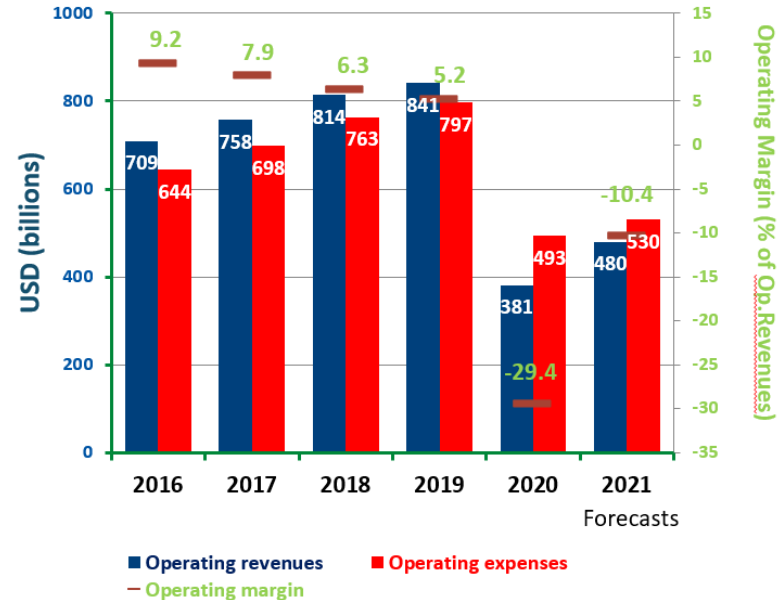
2020 vs. 2019:

- Overall reduction of **50% of seats offered by airlines**
- Overall reduction of **2.7 billion passengers (-60%)**
- Approx. **USD 372 billion loss** of gross passenger operating revenues of airlines

2021 vs. 2019:

- Overall reduction of **40% of seats offered by airlines**
- Overall reduction of **2.2 billion passengers (-49%)**
- Approx. **USD 324 billion loss** of gross passenger operating revenues of airlines

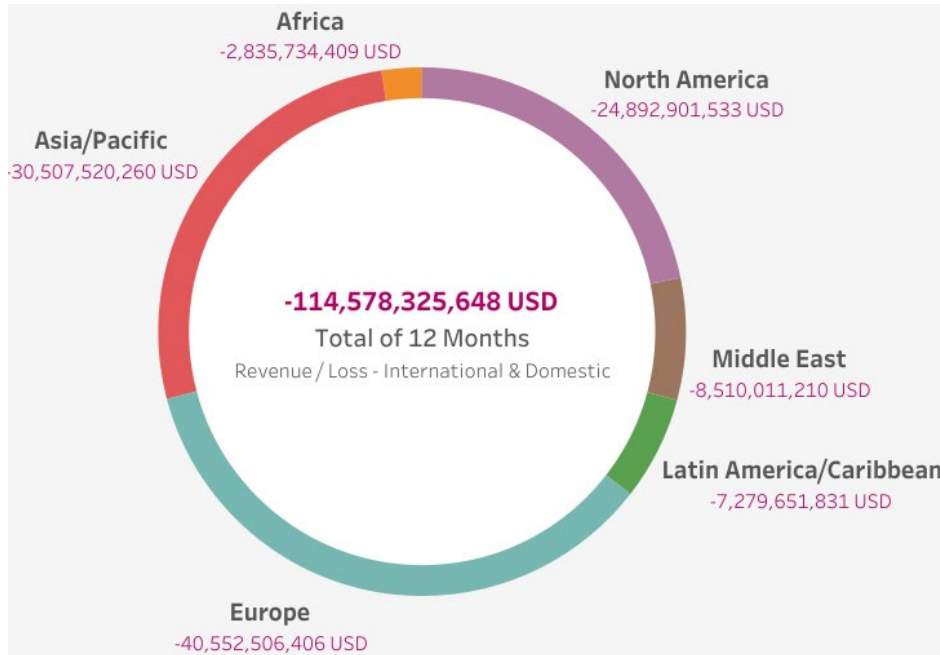
Unprecedented operating loss of USD 112 billion in 2020



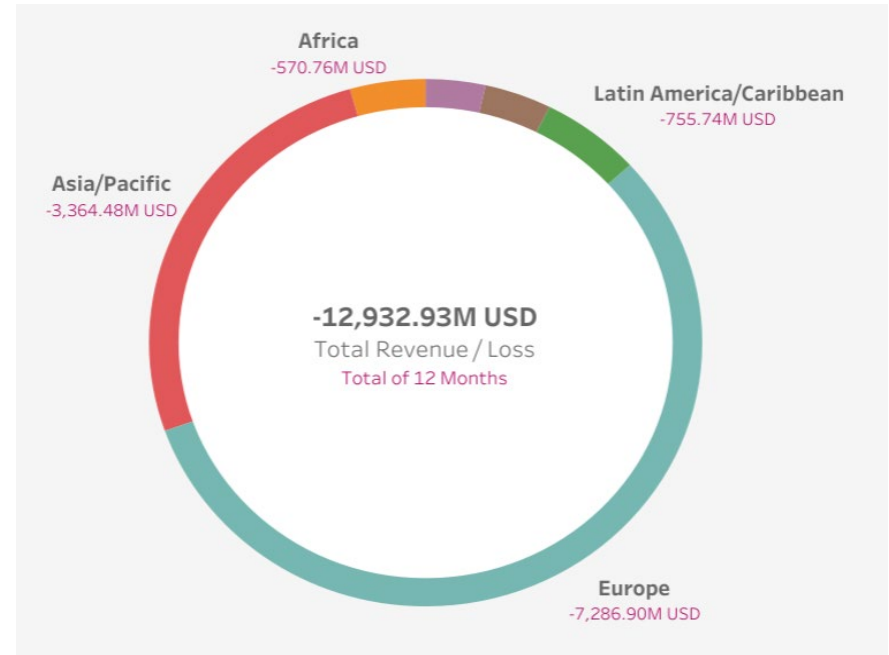


Airport and ANSP revenues were also severely impacted

Airport revenue loss in 2020



ANSP revenue loss in 2020



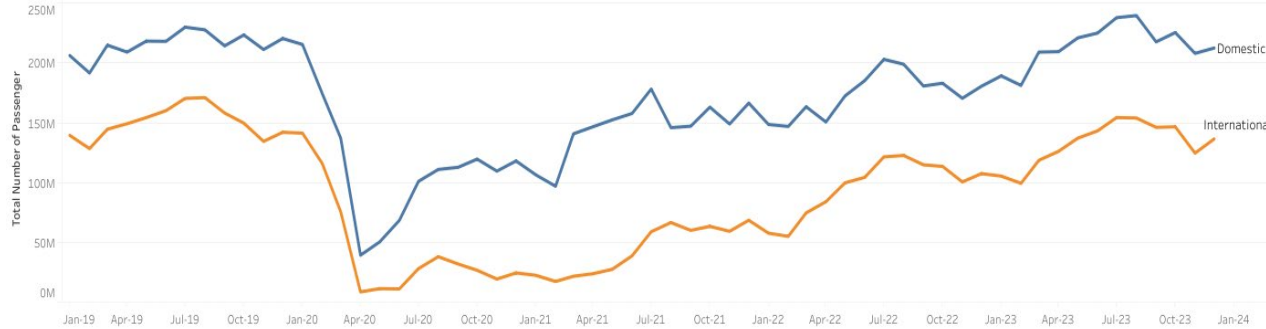


Recovery Overview



Global traffic recovering close to pre-pandemic levels

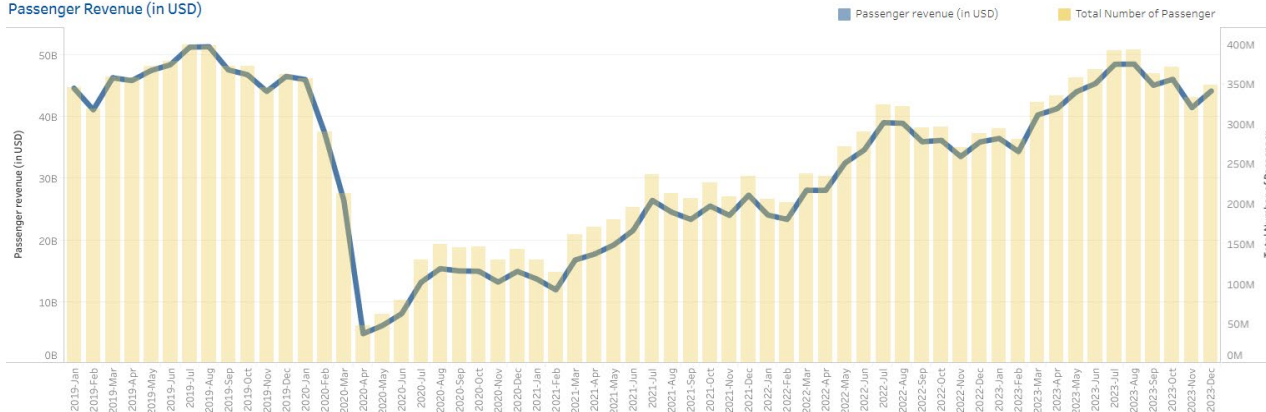
Overview of Passenger Evolution



Passenger traffic

ICAO's latest analyses reveal that air transport seat capacity and passenger totals globally have reached pre-pandemic levels in Q1 2024

Passenger Revenue (in USD)

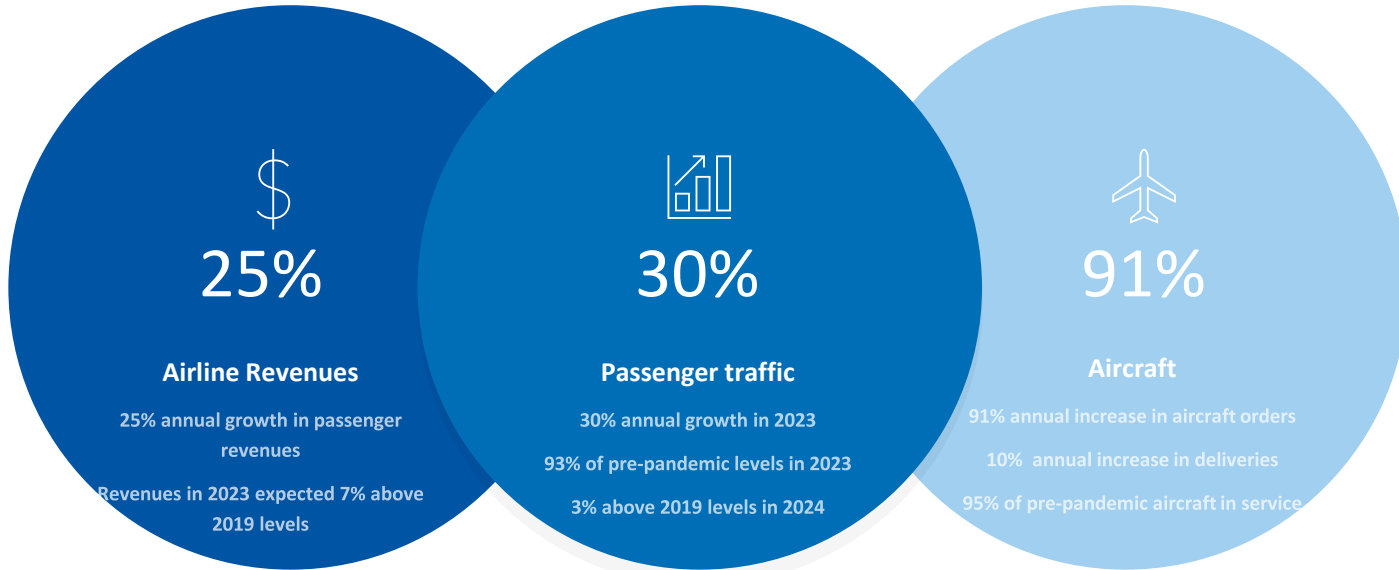


Passenger operating revenue

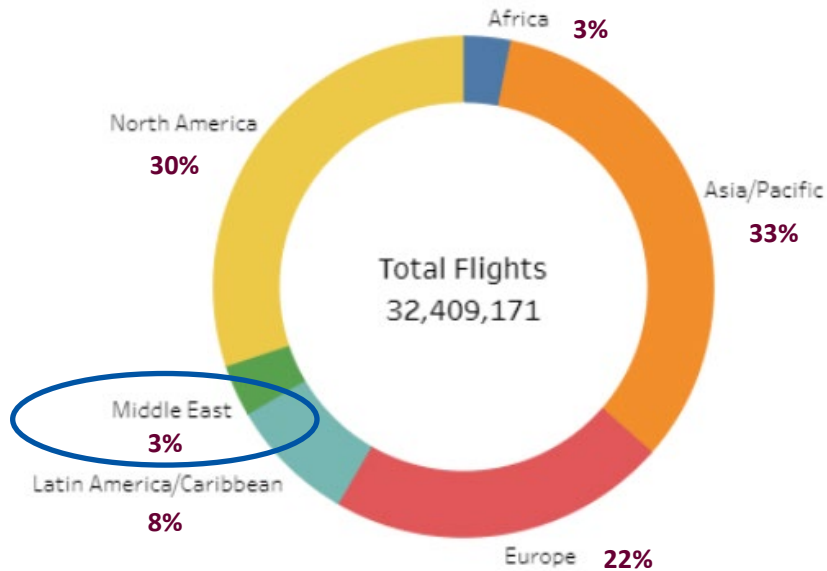
ICAO's latest analysis reveals that despite high fuel prices and economic uncertainties, airline total operating profits in 2023 are estimated at USD 516 billion, close to the 2019 levels



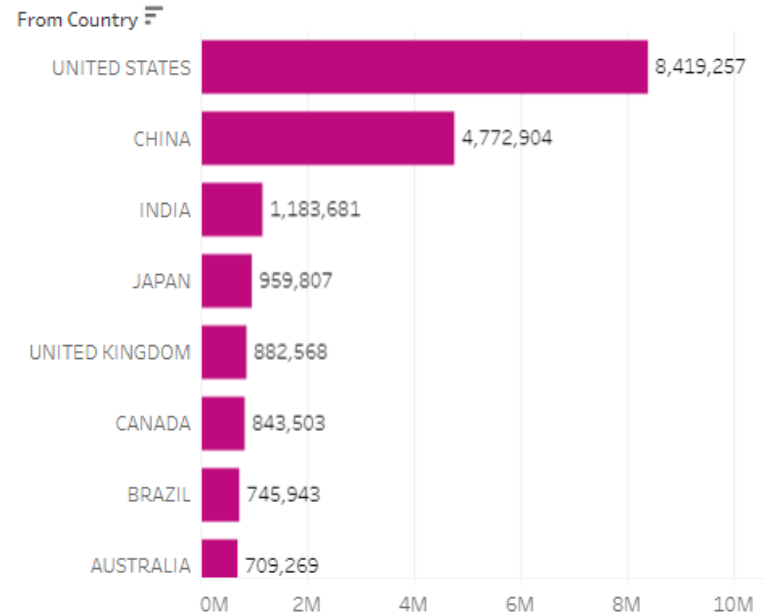
Global traffic in 2023: A recovery from the pandemic shock



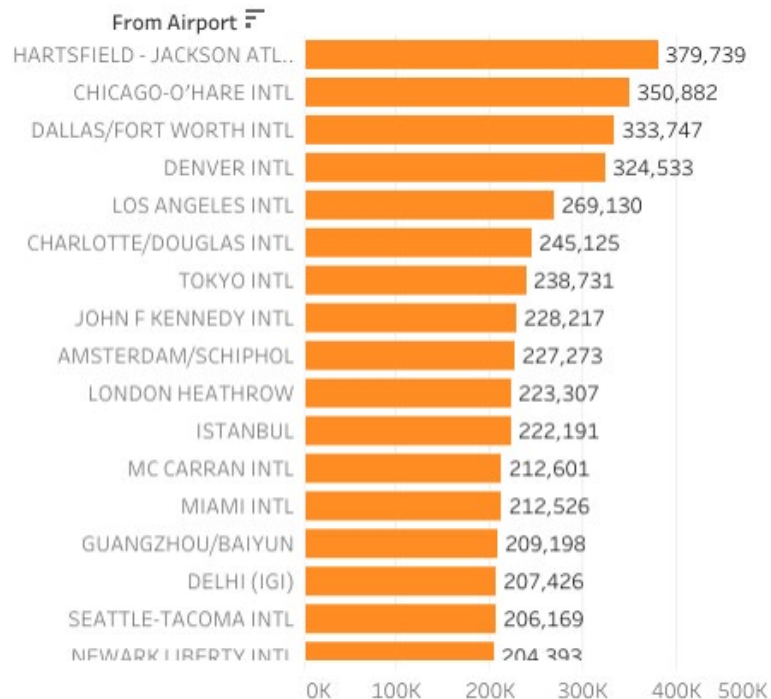
Number of flights by region (International and domestic, 2023)



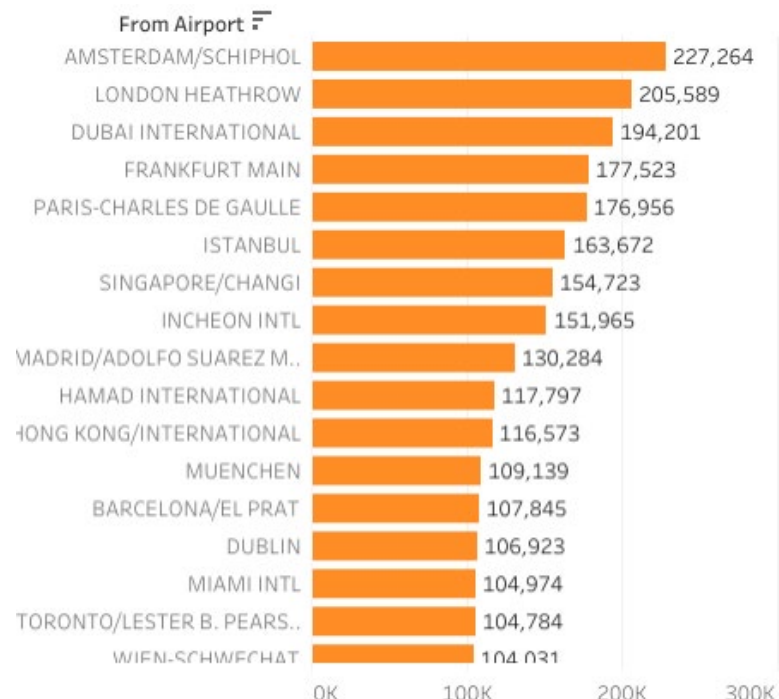
Number of flights by State (International and domestic, 2023)



Number of flights by airports (International and domestic, 2023)

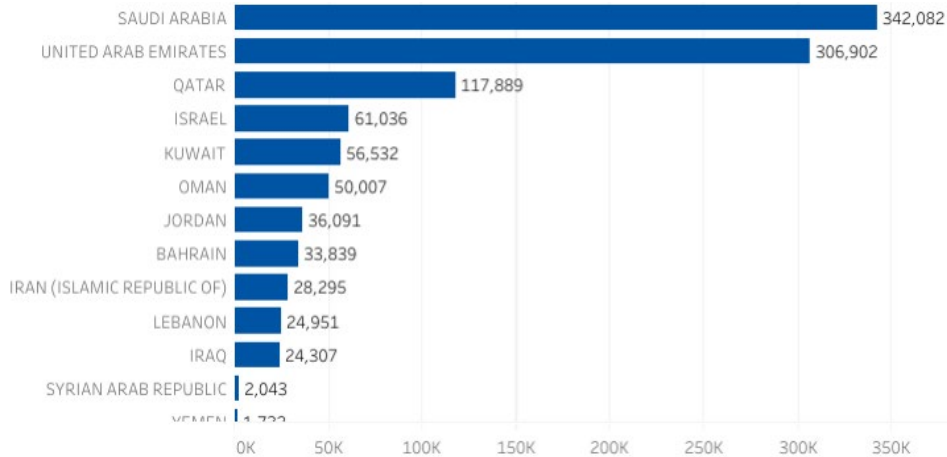


Number of flights by airports (International, 2023)

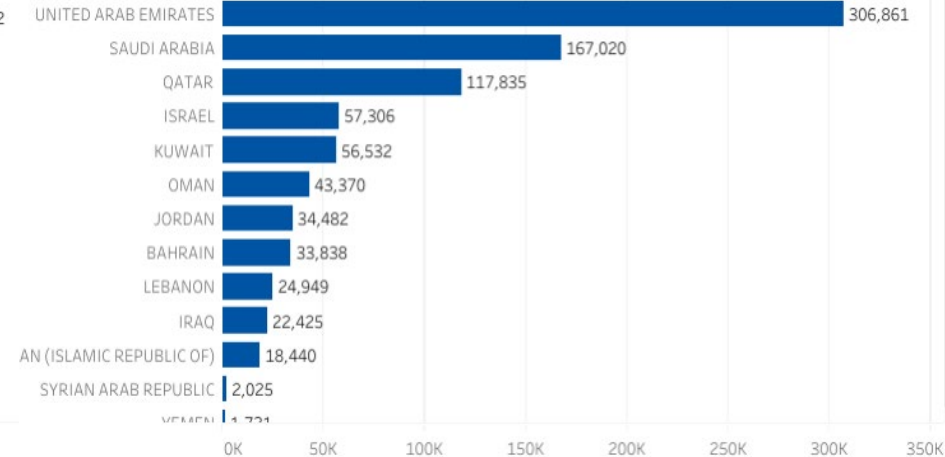




Number of flight by State
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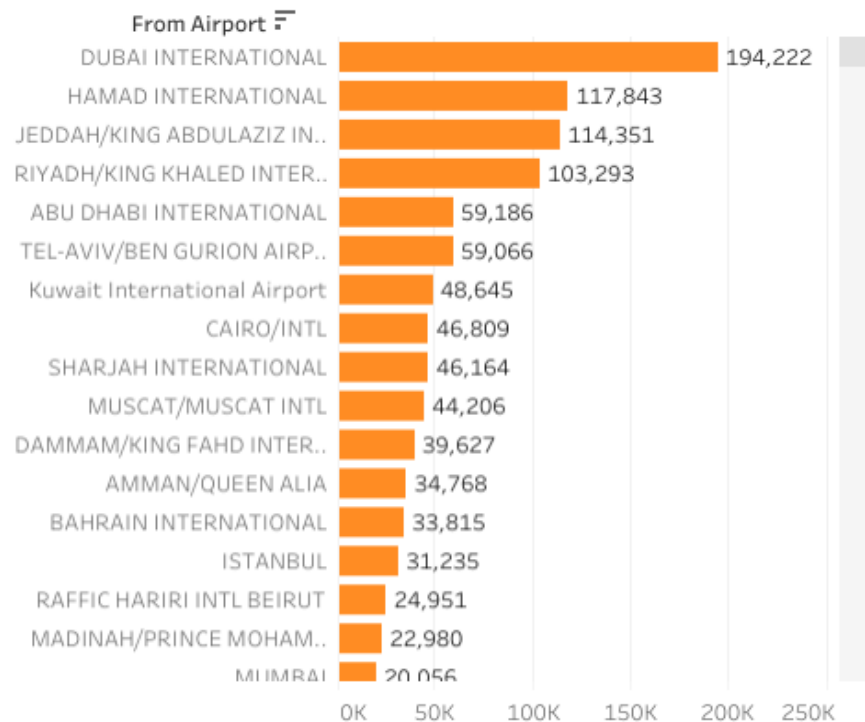


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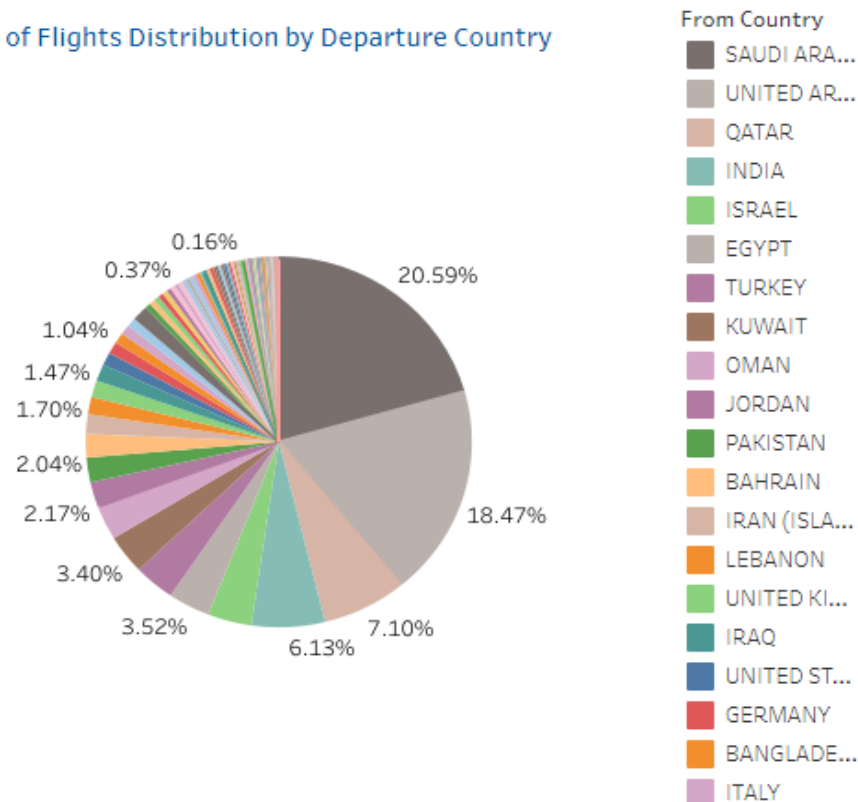




Number of Flights Ranking by Departure Airport

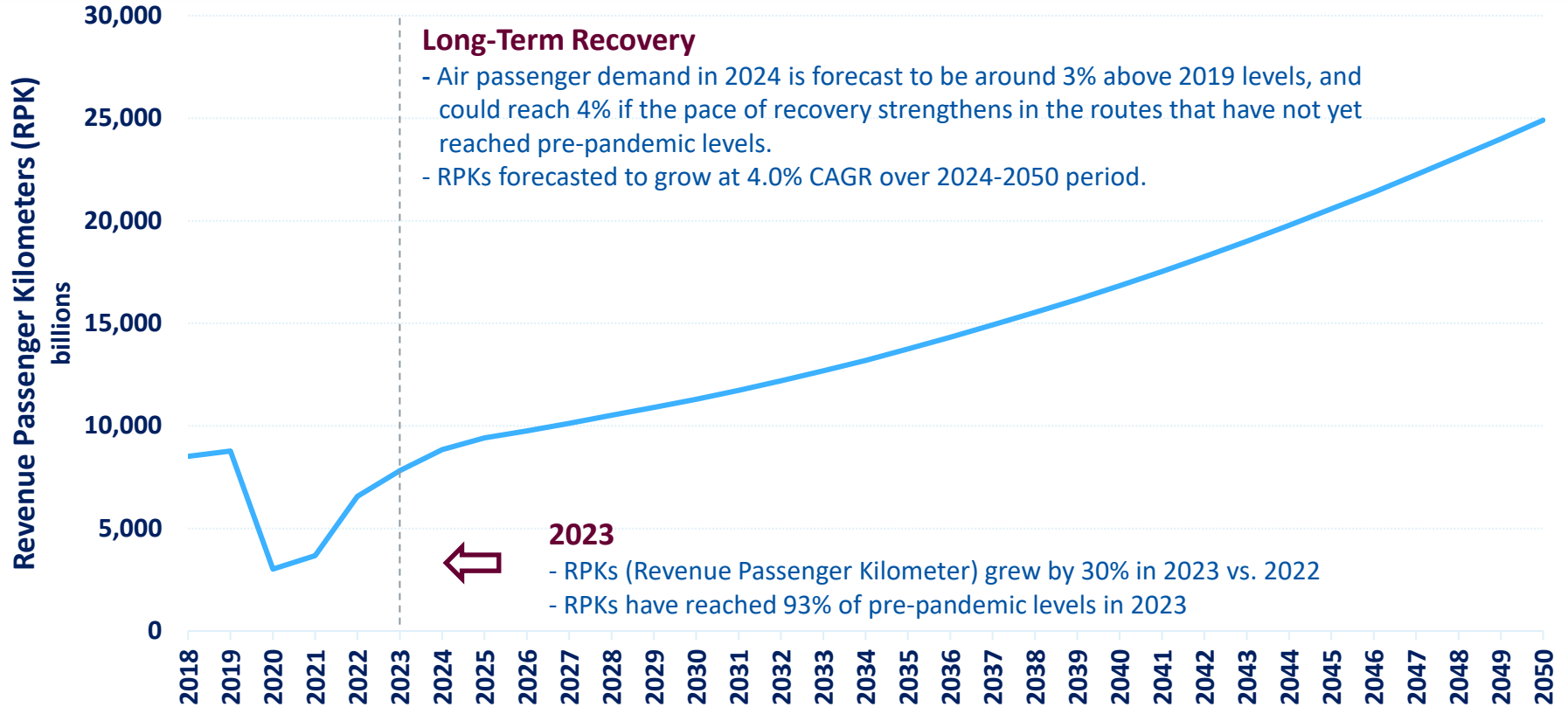


Number of Flights Distribution by Departure Country



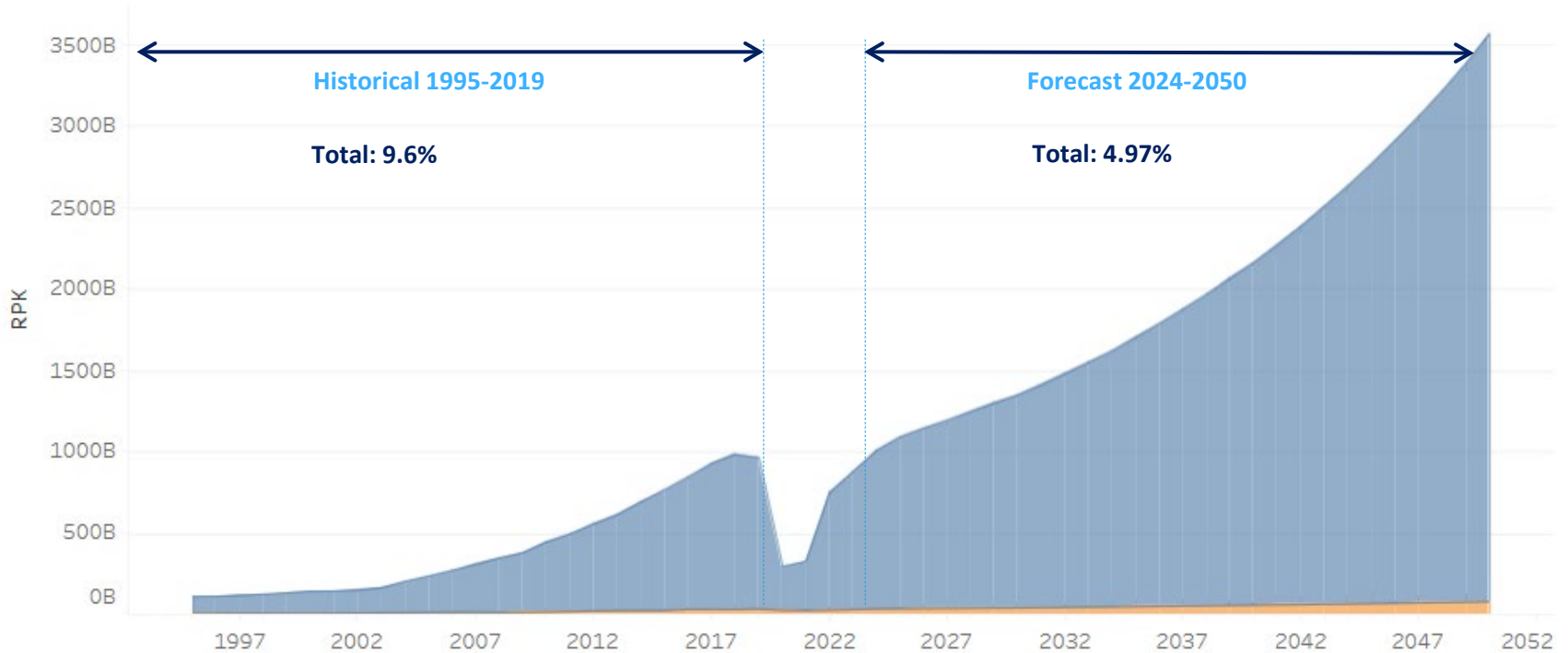


Long-term Traffic Forecasts





Revenue Passenger Kilometres (RPK)

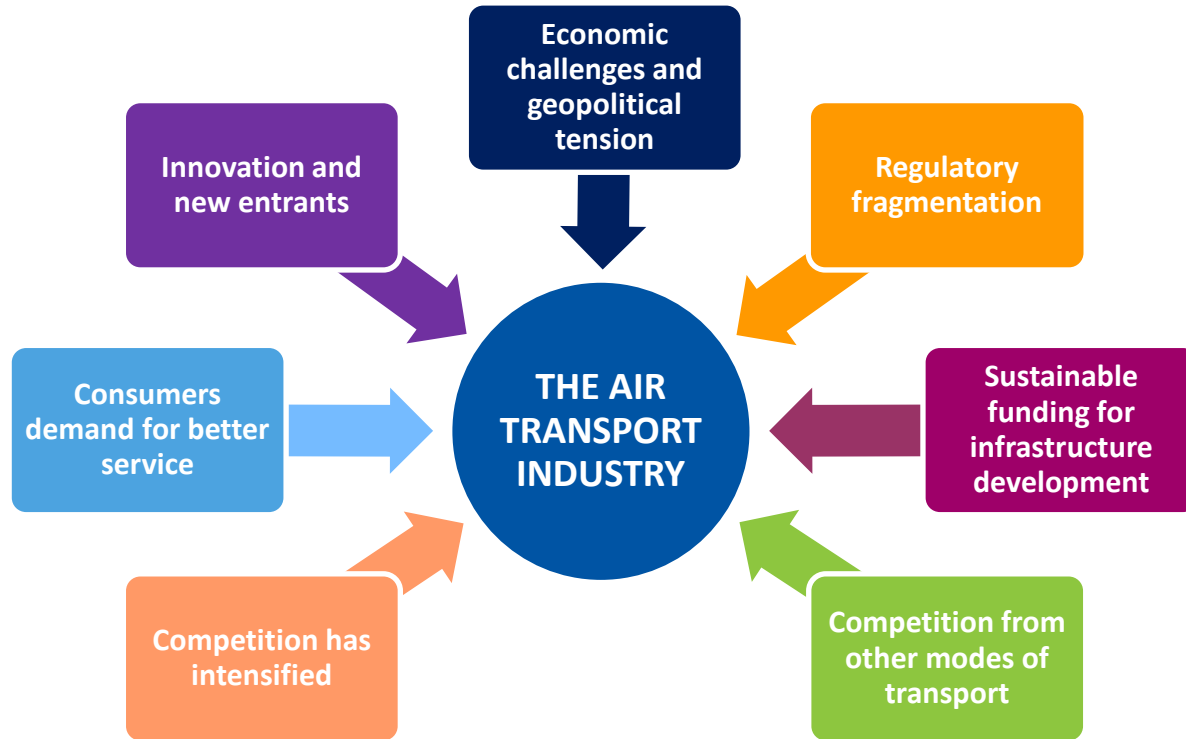


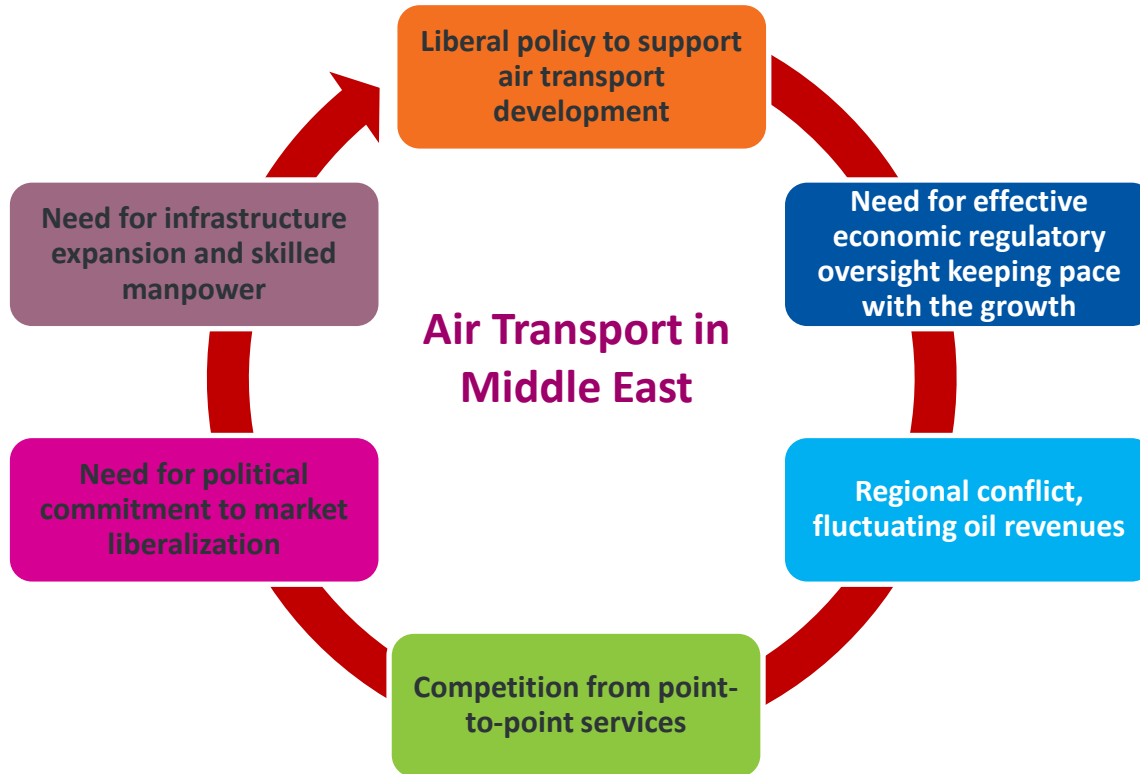


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Air Transport Development







Thank You!

