



ICAO PREDICTS CONTINUED TRAFFIC GROWTH THROUGH 2015

MONTRÉAL, 16 July 2013 – World scheduled air passenger traffic grew by 4.9 per cent in 2012, reaching 5.4 trillion passenger-kilometres performed (PKPs) and is expected to increase by 4.8, 5.9 and 6.3 per cent in 2013, 2014 and 2015, respectively, according to the International Civil Aviation Organization (ICAO).

The 4.9 per cent growth in PKPs (international and domestic services combined) recorded by airlines of the 191 Member States of ICAO was significantly lower than the 6.6 per cent increase posted in 2011. The number of passengers grew by some 4.7 per cent to almost 3 billion, while departures were up 0.7 per cent to 31.2 million globally.

Short- and Medium-Term Forecasts Point to Continued Growth

ICAO expects world scheduled air traffic, in terms of PKPs, to grow by 4.8 per cent in 2013, close to the growth rate recorded in 2012.

Air Traffic Medium-Term Forecasts to 2015

*International and Domestic Traffic
Passenger-kilometres performed (PKPs)*

	Annual Growth Rates				
	History		Forecasts		
	2011	2012*	2013	2014	2015
Region of State's AOC Holders	(%)	(%)	(%)	(%)	(%)
Europe	9.5	3.9	4.4	5.5	6.2
Africa	0.9	4.2	5.2	5.7	6.0
Middle East	9.2	13.7	10.2	11.2	10.8
Asia/Pacific	7.1	6.4	5.5	6.4	6.8
North America	2.4	1.3	2.3	3.3	3.8
Latin America/Caribbean	11.1	8.6	7.6	8.7	8.0
World	6.6	4.9	4.8	5.9	6.3

*preliminary figures

According to IHS/Global Insight, a major economic forecasting organization, world Gross Domestic Product (GDP) at Purchasing Power Parity (PPP) in real terms will grow at 3.1 per cent during 2013, up from 3.0 per cent last year.

In the first half of 2013, the European Union (EU) remained mired in recession, while most other key economies grew at lower-than-expected rates. Results for the second half of the year should improve, given the impressive resilience of the US economy, the economic recovery in Japan and the stabilization of Eurozone financial markets.

Despite regional turmoil and a pessimistic short-term economic outlook, the airlines of the Middle East should continue to register the fastest traffic growth in terms of PKPs, with a 10.2 per cent increase over 2012. This forecast is based on the strong performance of its largest air carriers in gaining market share on international routes outside of the Region.

The airlines of Latin America/Caribbean, Asia/Pacific and African Regions are expected to grow at 7.6, 5.5 and 5.2 per cent in 2013, respectively. Scheduled passenger air traffic in Europe and North America should increase by 4.4 and 2.3 per cent in 2013, respectively, leading to a slightly higher share of world traffic for European carriers than for North American operators. The Asia/Pacific Region will remain the largest market.

Current expectations of a 4.0 (2014) and 4.5 (2015) per cent annual GDP at PPP growth rate for the world economy over 2014–2015 should translate into world air traffic growth of 5.9 and 6.3 per cent, respectively.

2012 Revisited

In terms of PKPs, the Asia/Pacific Region is the largest market with 30 per cent of world traffic. The airlines of this Region posted last year a 6.4 per cent increase over 2011. Airlines of the European and North American Regions, each representing 27 per cent of world traffic, grew at 3.9 and 1.3 per cent, respectively. The Middle East Region had the highest growth rate with 13.7 per cent and accounts for 8 per cent of world traffic. The Latin America/Caribbean Region, with 5 per cent of world traffic, grew at 8.6 per cent, while the African Region, with 2 per cent of world traffic, was up by 4.2 per cent.

International traffic in terms of PKPs increased by 5.4 per cent in 2012. The largest growth rate was registered by the airlines of the Middle East Region at 14.3 per cent, followed by those of the Latin America/Caribbean Region at 8.9 per cent, the Asia/Pacific Region at 4.6 per cent and Europe at 4.4 per cent. International traffic in the African and North American Regions grew by 4.2 and 2.0 per cent, respectively. The comparatively low growth figure for North America relates to a larger traffic base and still represents a significant increase in absolute terms.

In terms of domestic traffic, markets grew by 4.1 per cent overall. Growth rates of 0.1, 0.9 and 3.6 per cent in Europe, North America and the Middle East, respectively, were much lower than those achieved by the African, Latin America/Caribbean and Asia/Pacific Regions at 4.3, 8.4 and 8.6 per cent, respectively.

In the Asia/Pacific Region, the domestic market in China increased by 10.3 per cent. North America is still the largest domestic market with 47 per cent of the world domestic scheduled traffic, however, deceleration of traffic growth is confirming the maturity of this market.

A specialized agency of the United Nations, ICAO was created in 1944 to promote the safe and orderly development of international civil aviation throughout the world. It sets standards and regulations necessary for aviation safety, security, efficiency, capacity and environmental protection, amongst many other priorities. The Organization serves as the forum for cooperation in all fields of civil aviation among its 191 Member States.

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