



ICAO

The Free Route Airspace Implementation Workshop / 2

Bangkok, Thailand

13th Nov 2024

This event is jointly organised with



EU - Asia Aviation Partnership Projects (APP)

Airline Involvement in Regional FRA Initiatives

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Industry Status and Outlook

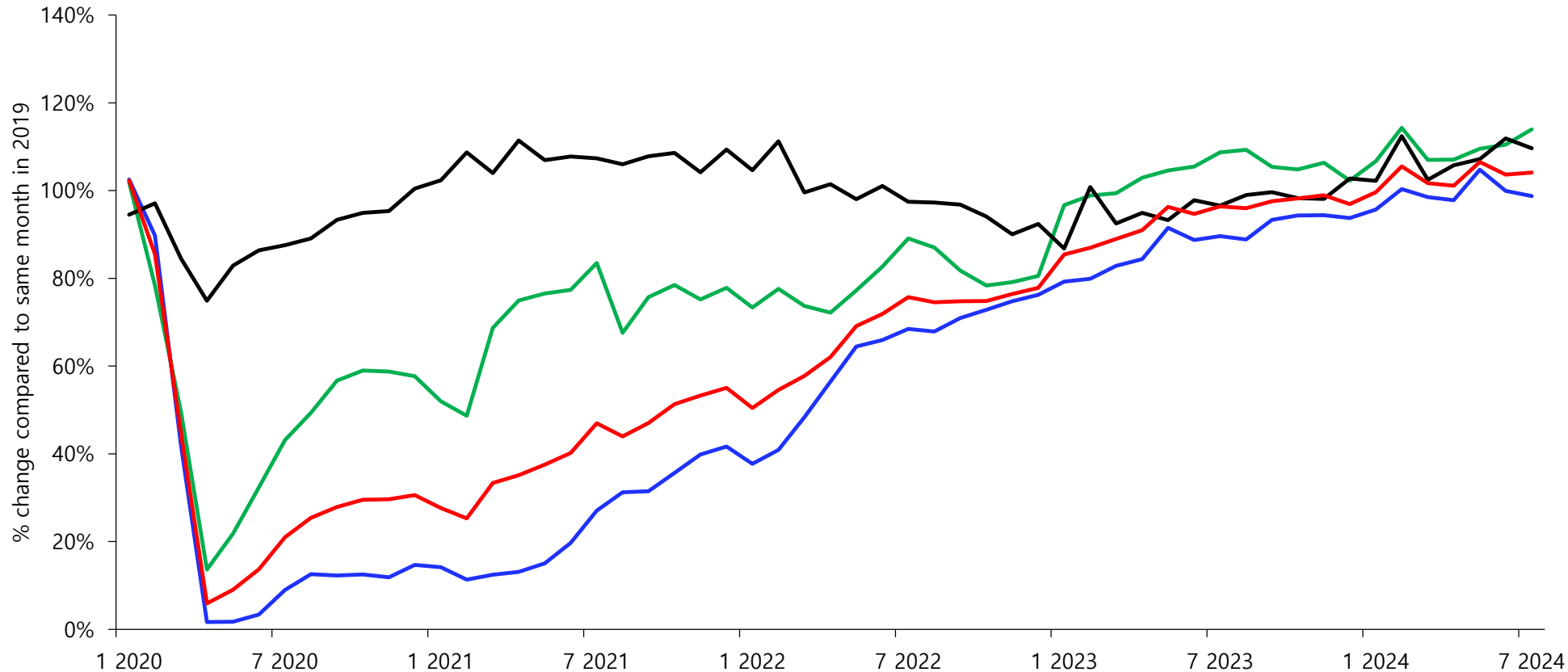


Global traffic has recovered

Total RPKs are currently at 104% of 2019 levels

July 2024 vs. July 2019

Global RPK and CTK growth



Domestic RPK 114%

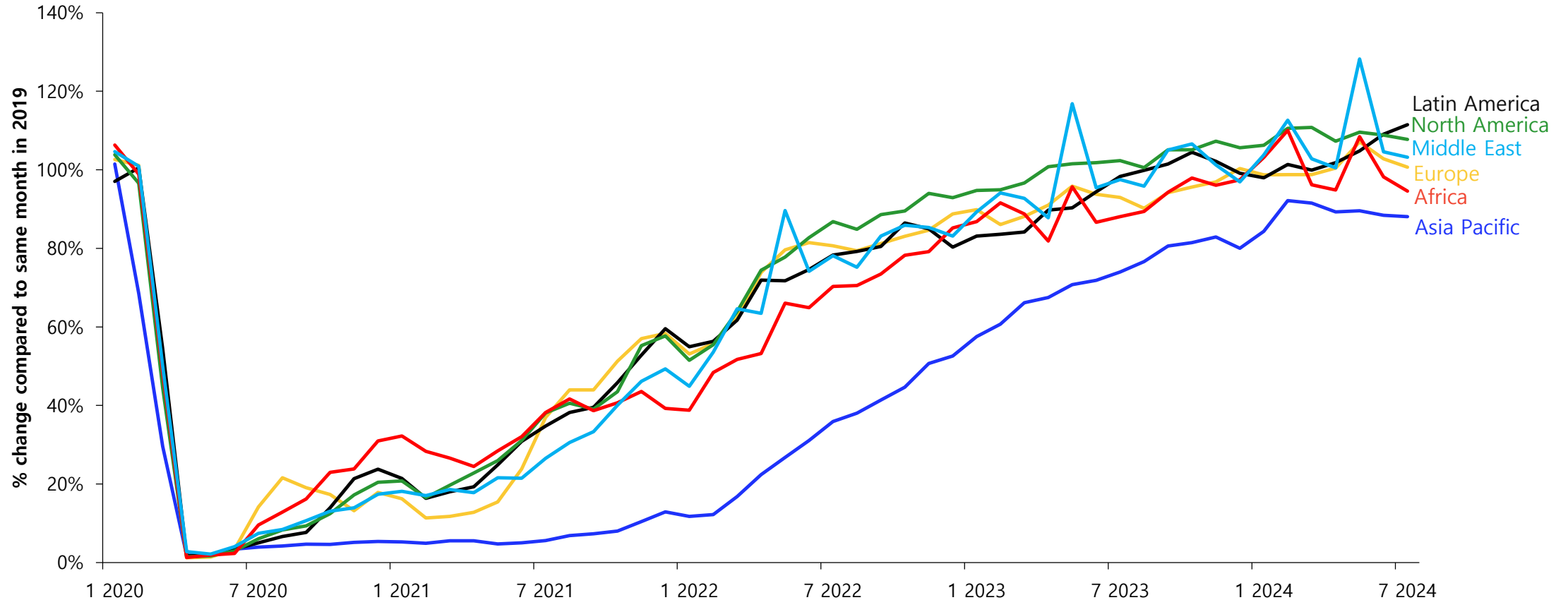
CTK 110%

Total RPK 104%

International RPK 99%

International traffic for all regions except Asia Pacific has recovered Asia Pacific traffic in July 2024 at 88% of pre-COVID levels

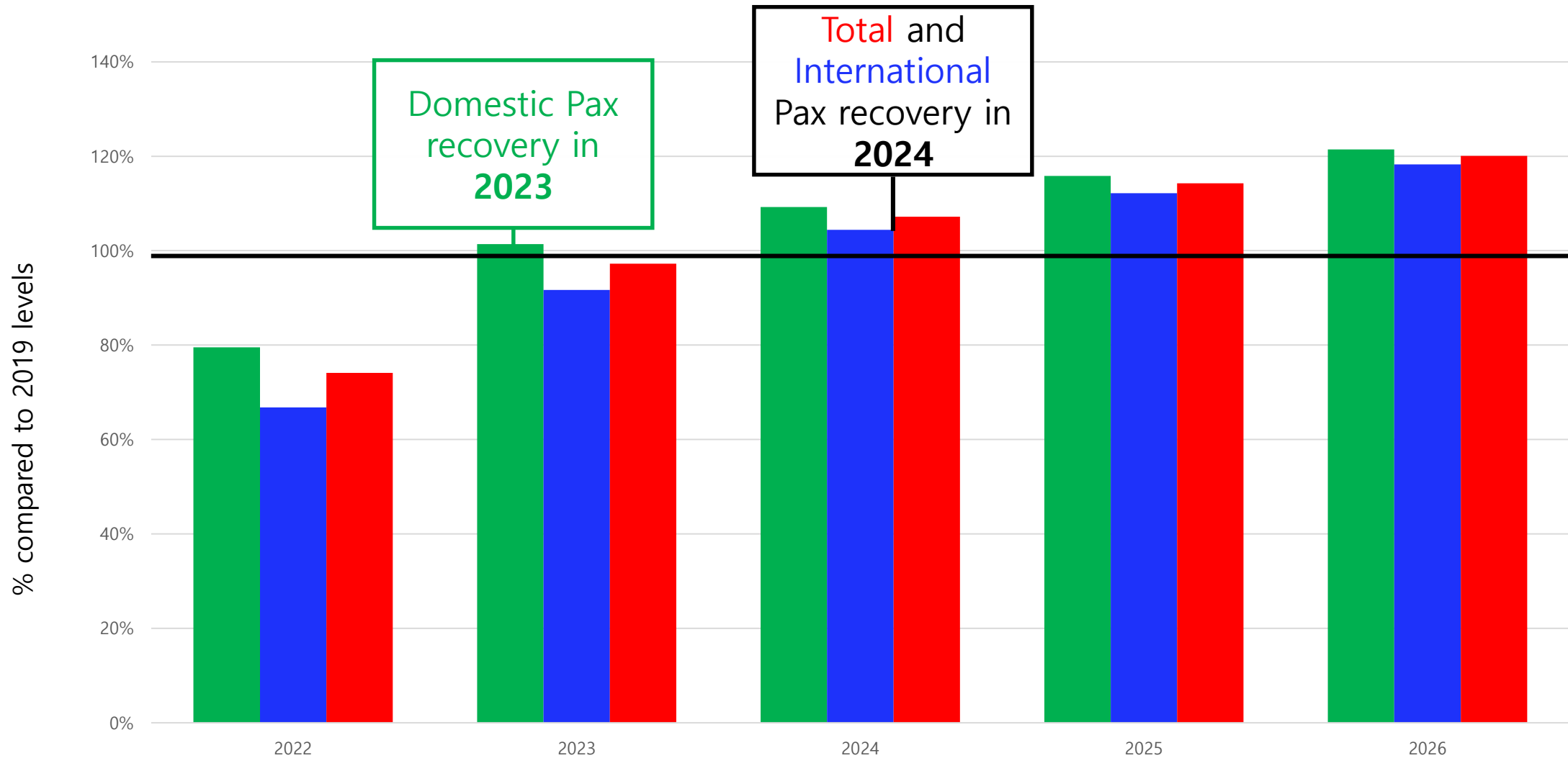
Growth in international air travel, RPKs by market



Source: IATA Monthly Statistics; traffic by airline region of registration

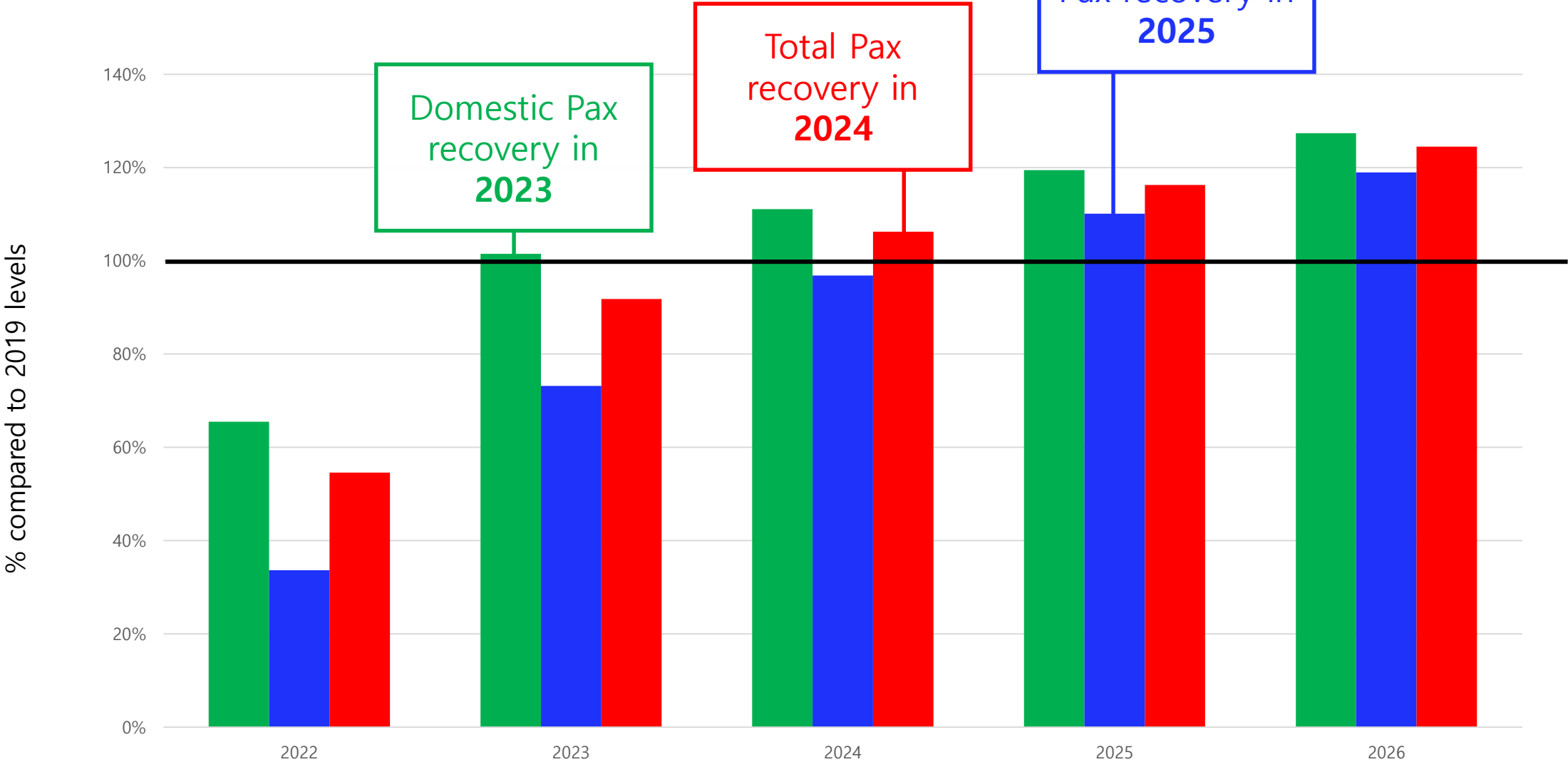


Global Passenger Forecast



Source: IATA; Tourism Economics. May 2024

Asia Pacific Passenger Forecast

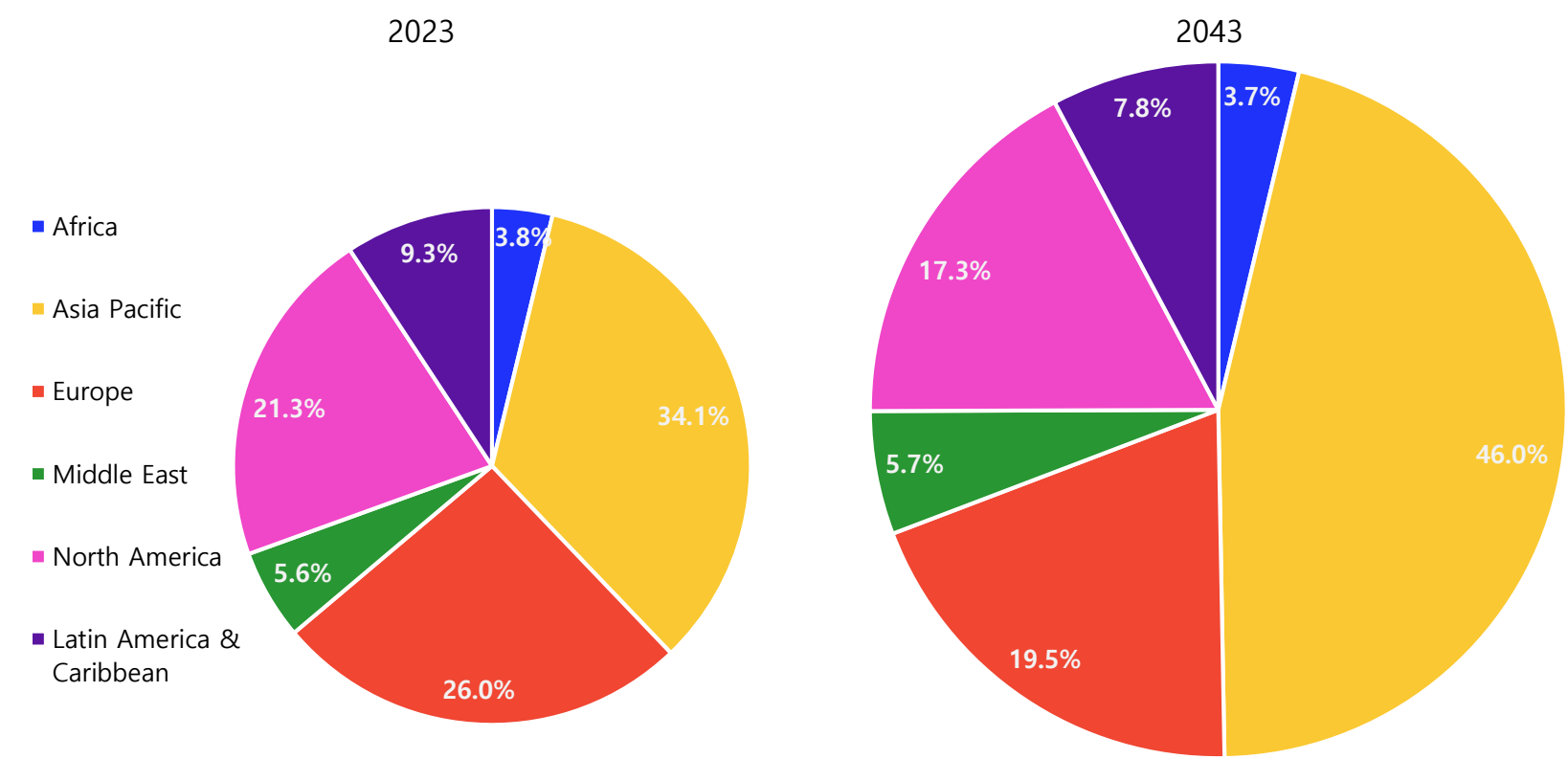


Source: IATA; Tourism Economics. May 2024



Global passengers to increase 2.1x by 2043 and grow 3.8% on average annually

Asia Pacific to account for 2/3 of additional passengers

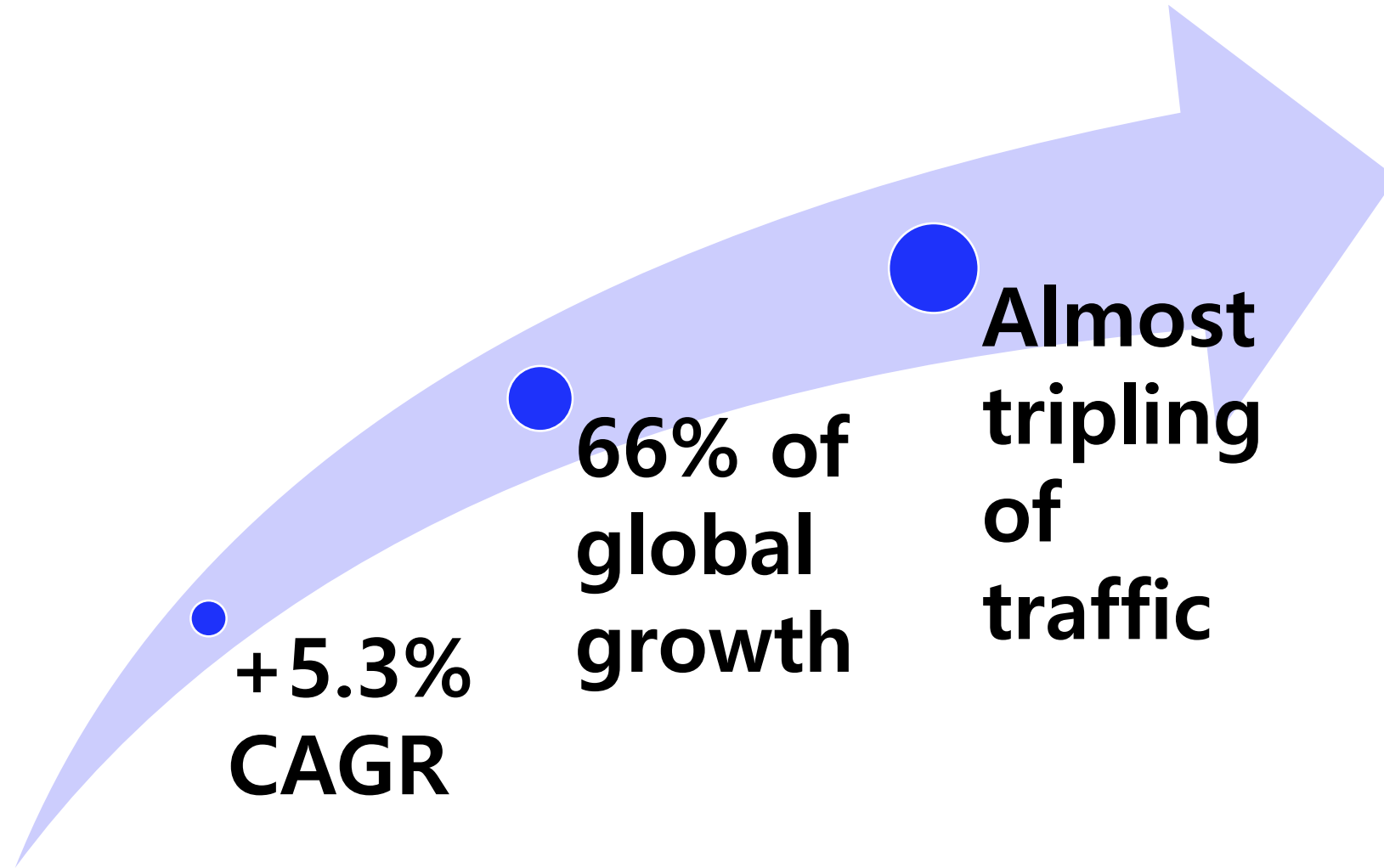


Region	CAGR (2023 - 2043)	Additional passengers by 2043, million)
Africa	3.7%	179
Asia Pacific	5.3%	2,750
Europe	2.3%	656
Middle East	3.9%	282
North America	2.7%	659
Latin America & Caribbean	2.9%	311
World	3.8%	4,154

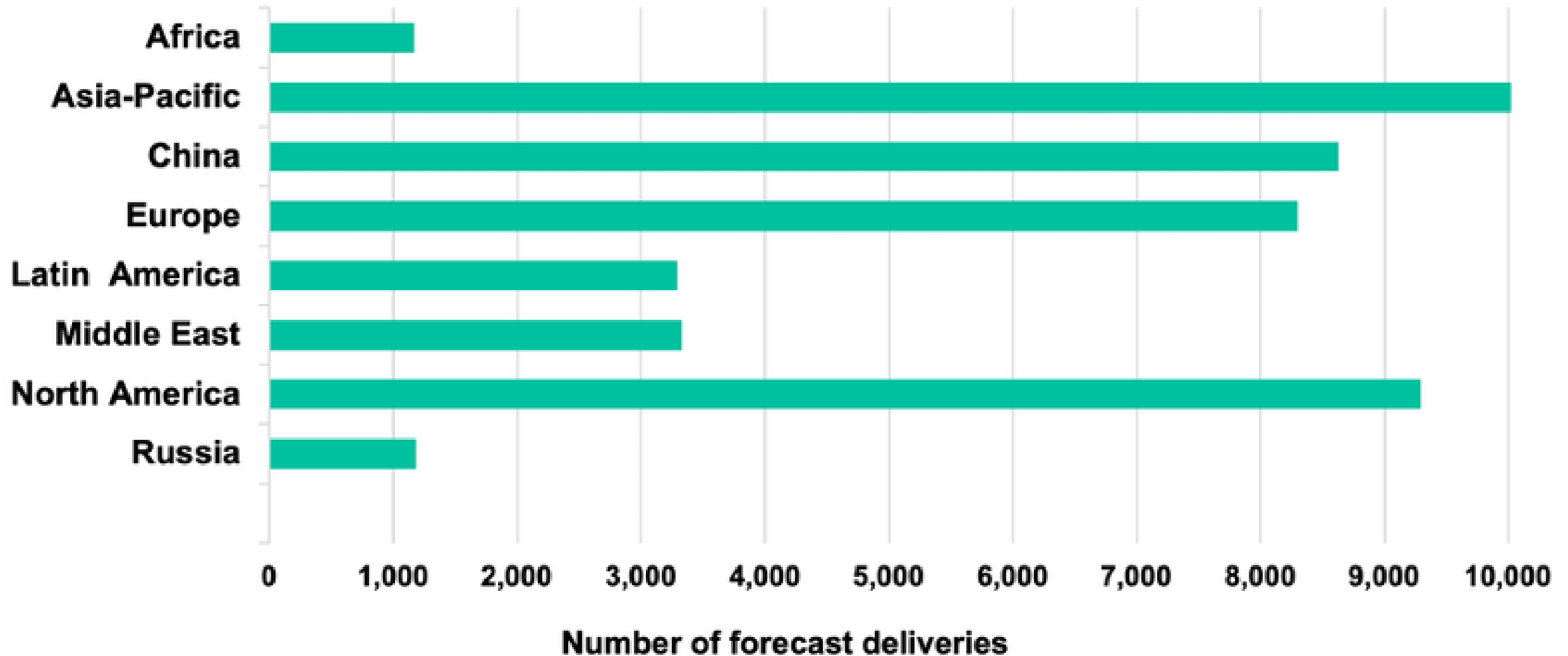
Source: Air Passenger Forecast – February 2024 update



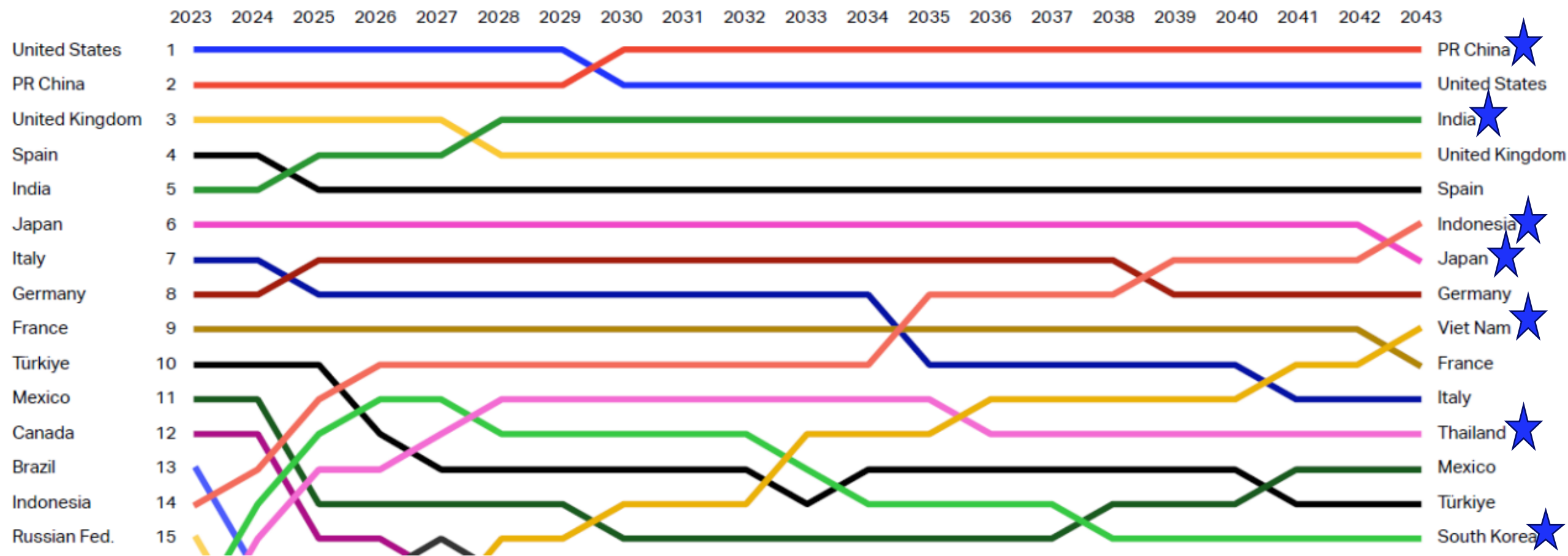
Asia Pacific growth 2023-2043



Aircraft Deliveries (2023-2042 forecast)



Top 15 air passenger markets over time



Ranking based on the number of passenger journeys to, from and within each market





Our commitment:

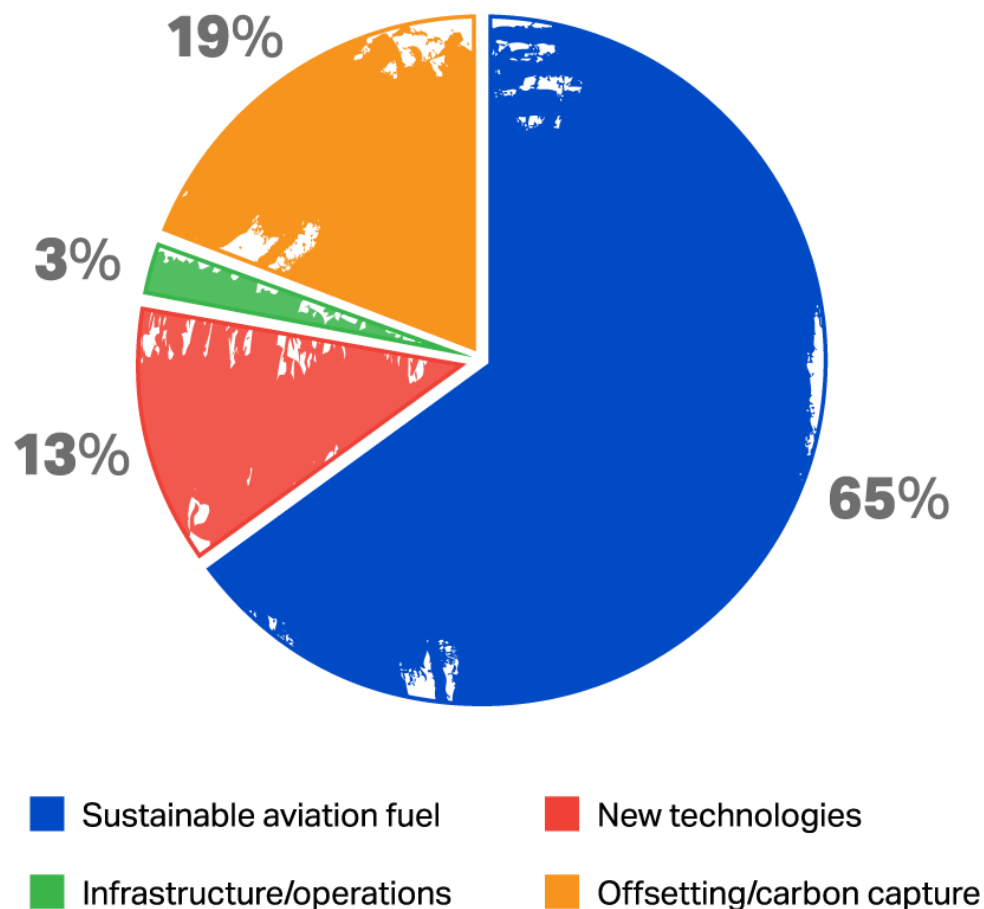
TO ACHIEVE NET ZERO CARBON EMISSIONS BY 2050

Target aligned with Paris Agreement goal to keep global warming under 1.5 °C

Aimed at keeping the benefit of global connectivity for future generations

Industry Net Zero 2050 Plan

Contribution to achieving Net Zero Carbon in 2050



Net Zero 2050 is achievable through:

Combination of measures

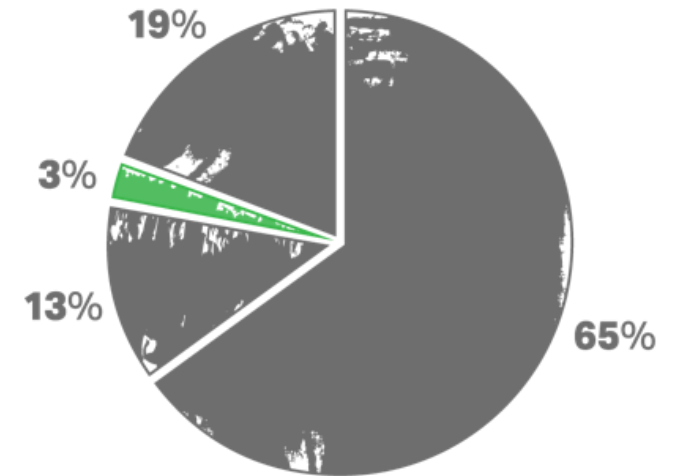
Sustainable Aviation Fuel, new technologies, operational and infrastructure improvements, and offsetting/carbon capture

Collective effort

of the entire industry together with governments, oil producers and investors

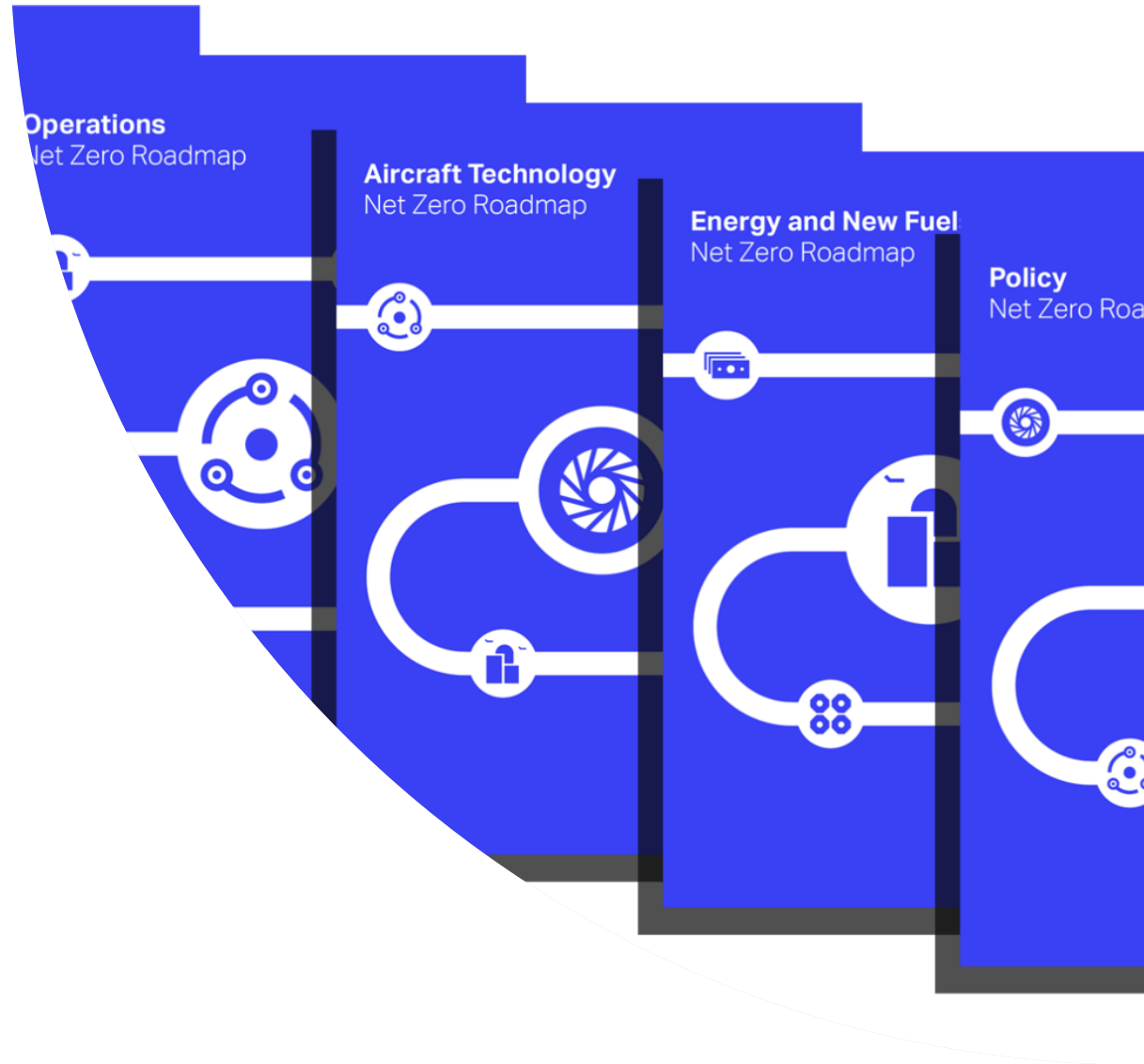
Operations/infrastructure improvements

- Operational efficiencies have resulted in a **55%** improvement in fuel burn per passenger km since 1990
- 3% contribution but this is **over and above** expected continuous improvements over this period, typically 1.5-2% per year.
- Can be implemented to deliver **immediate** emissions reductions

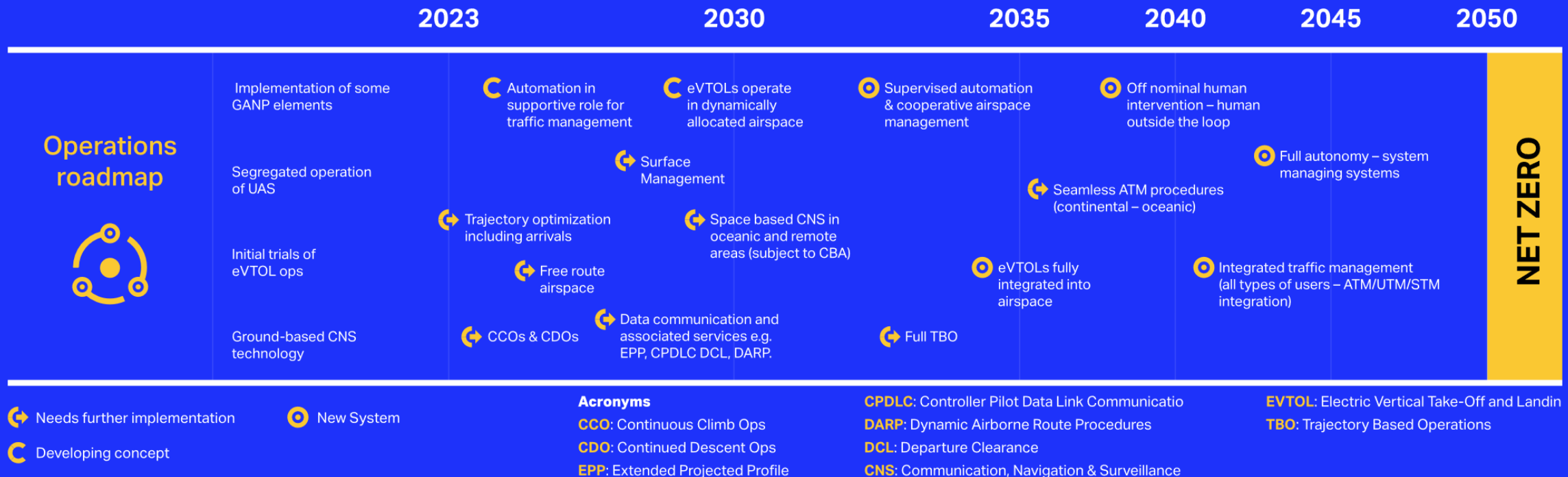


IATA Roadmaps:

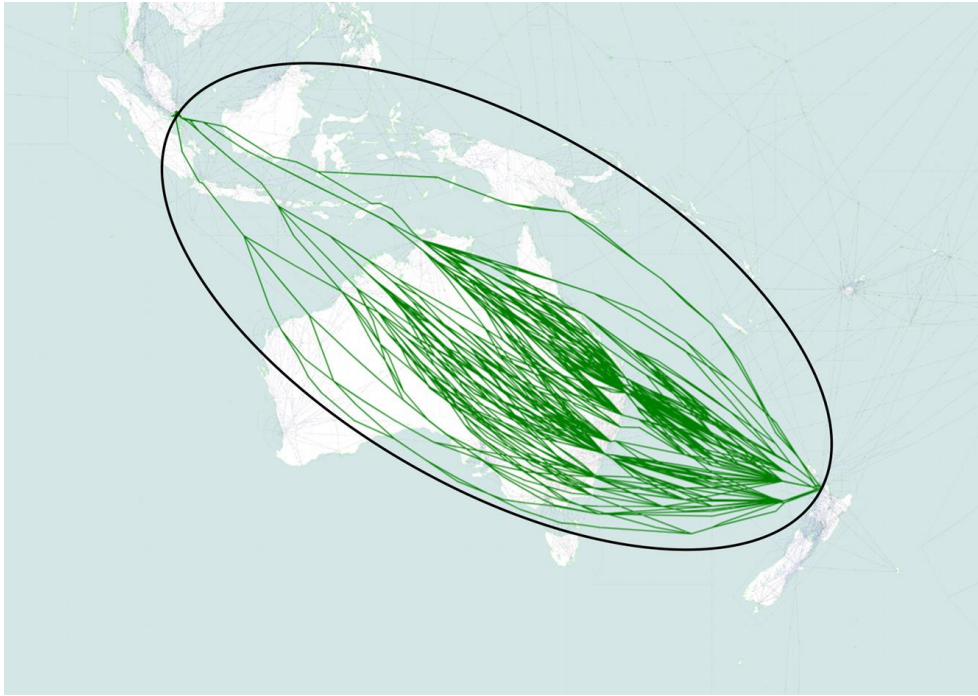
Providing a strategic vision to achieve Net Zero CO₂ emissions by 2050



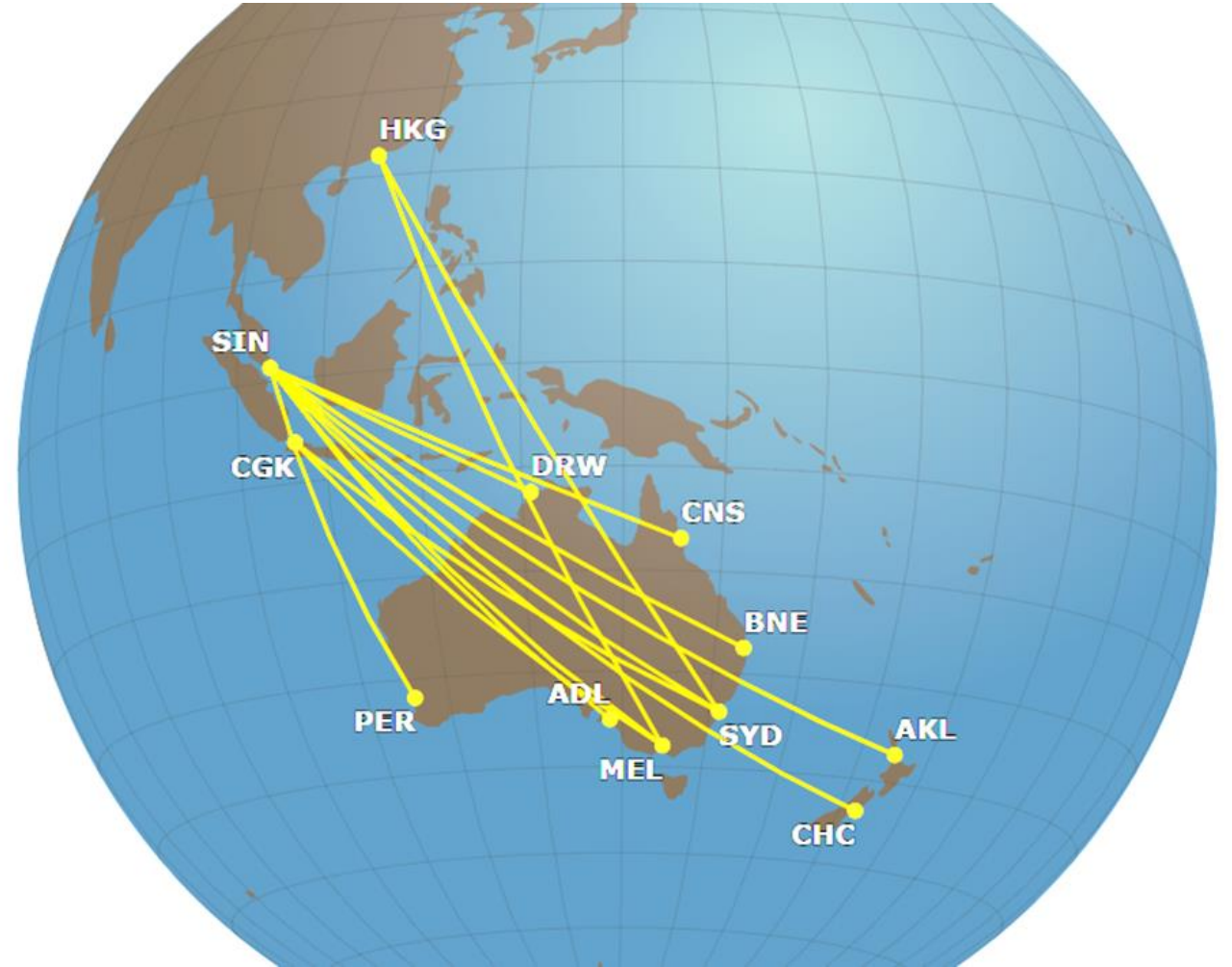
Operations Roadmap



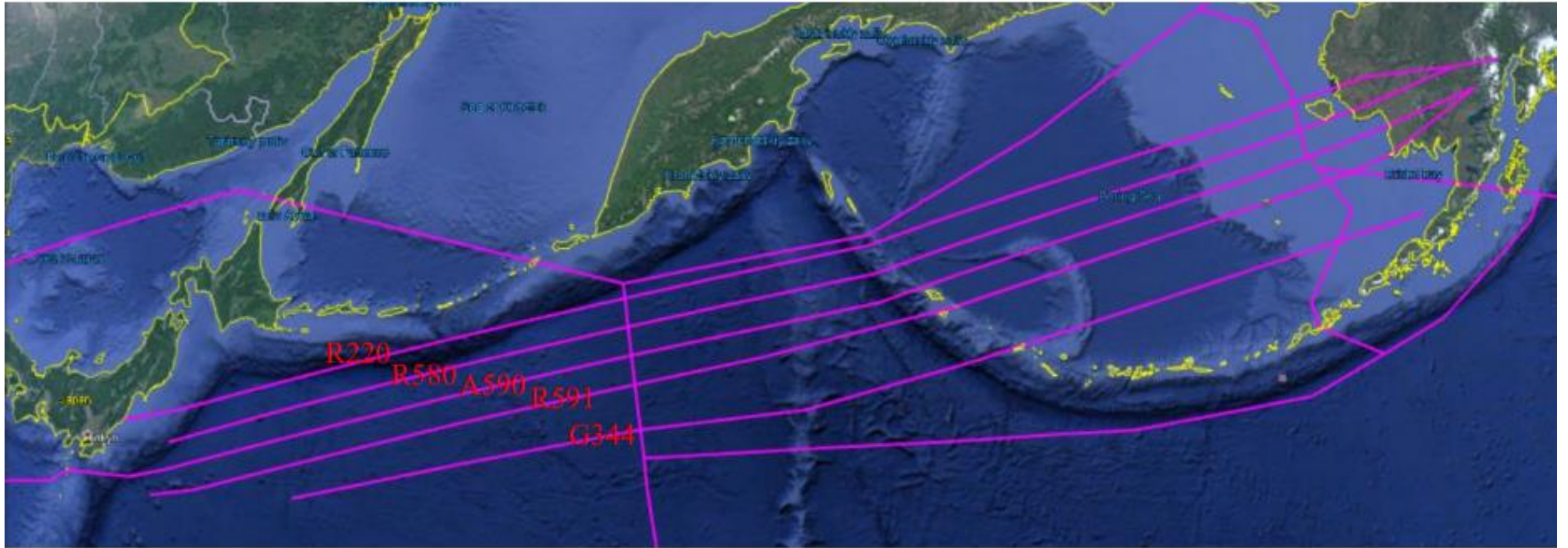
AAC WS4 SEA-Oceania FRTTO Project



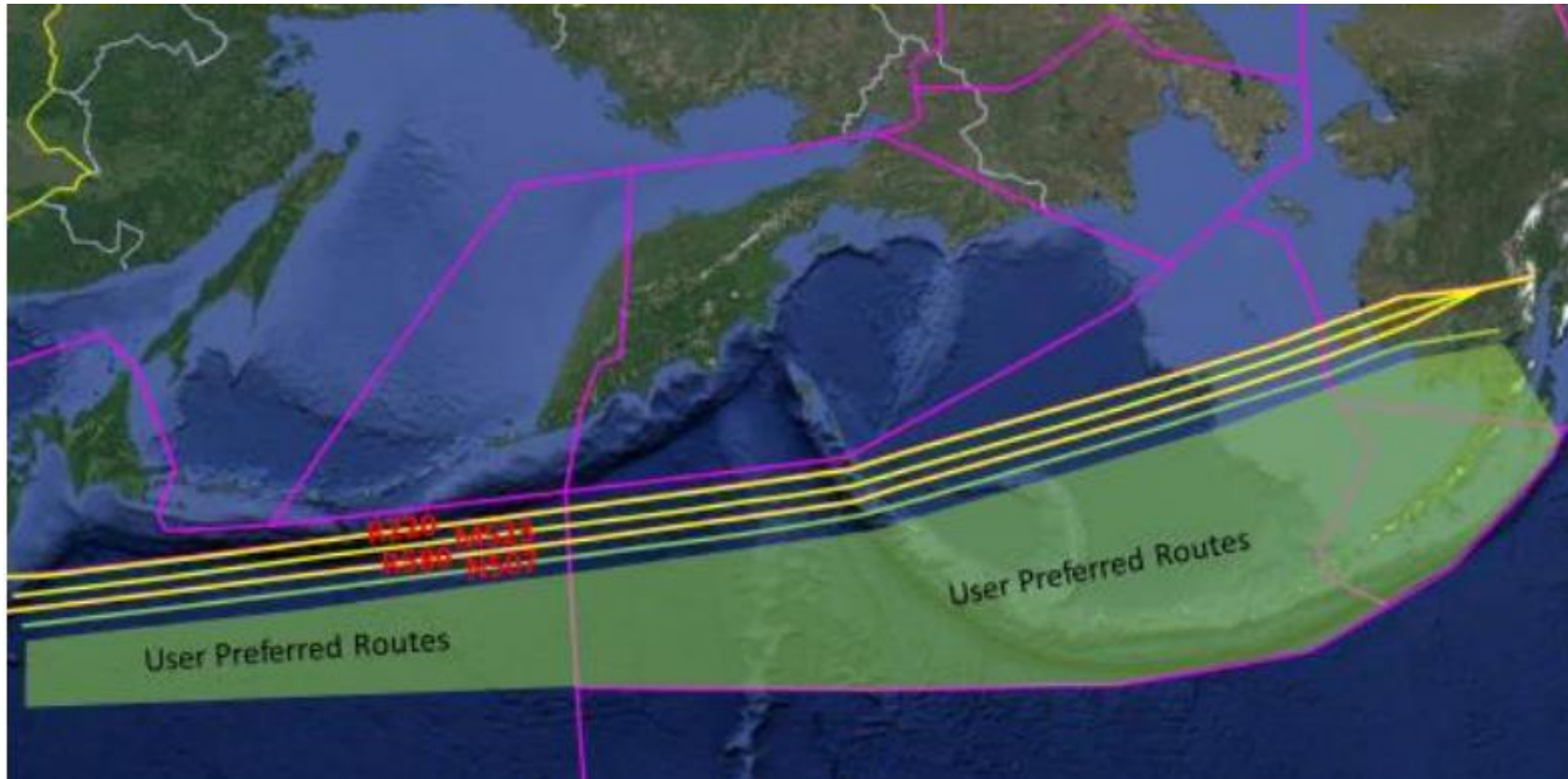
- Leveraging off existing bilateral initiatives
- Measured approach
- Conscious of workload management for all stakeholders
- Cumulative impact of many incremental improvements can be significant



Case Study – NOPAC Restructure



Case Study – NOPAC Restructure





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