



ICAO

INTERNATIONAL CIVIL AVIATION ORGANIZATION

A UN SPECIALIZED AGENCY



Updates on Air Transport

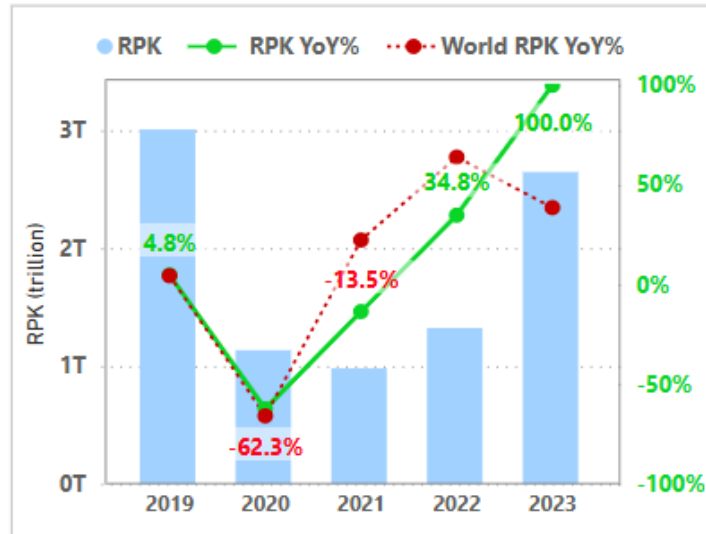
60th Conference of Directors General of Civil Aviation Asia and Pacific

*Sendai, Japan
28 July – 1 August 2025*

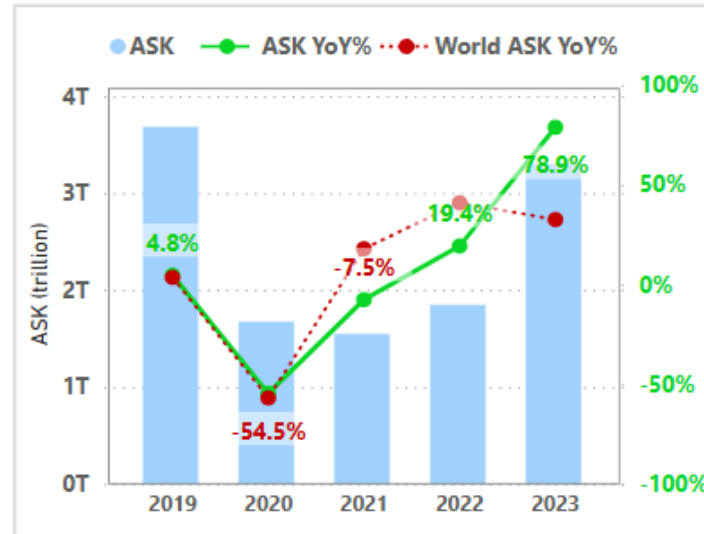
International Civil Aviation Organization (ICAO)

State of industry

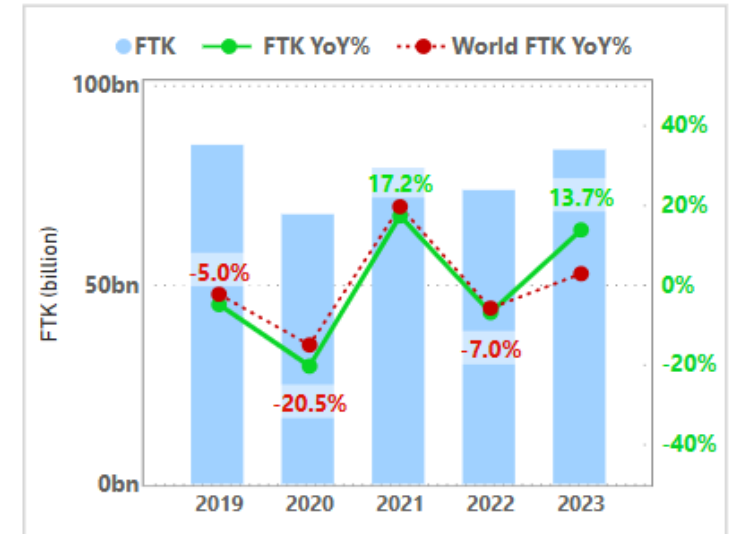
Asia/Pacific Traffic Trends



- Passenger traffic in Revenue Passenger-Kilometres (RPKs) increased by 100% in 2023.



- Seat Capacity in Available Seat-Kilometres (ASKs) increased by 79% in 2023.

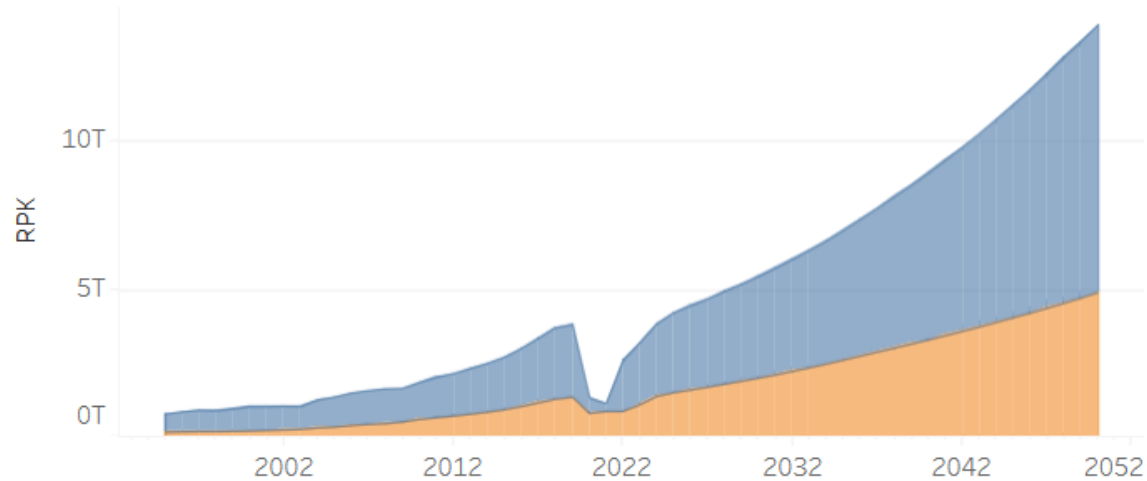


- Cargo traffic measures in Freight Tonnes-Kilometres (FTKs) increased by 14% in 2023.

Source: ICAO Air Transport Reporting Form A and AS (Official Statistics reported by Member States)

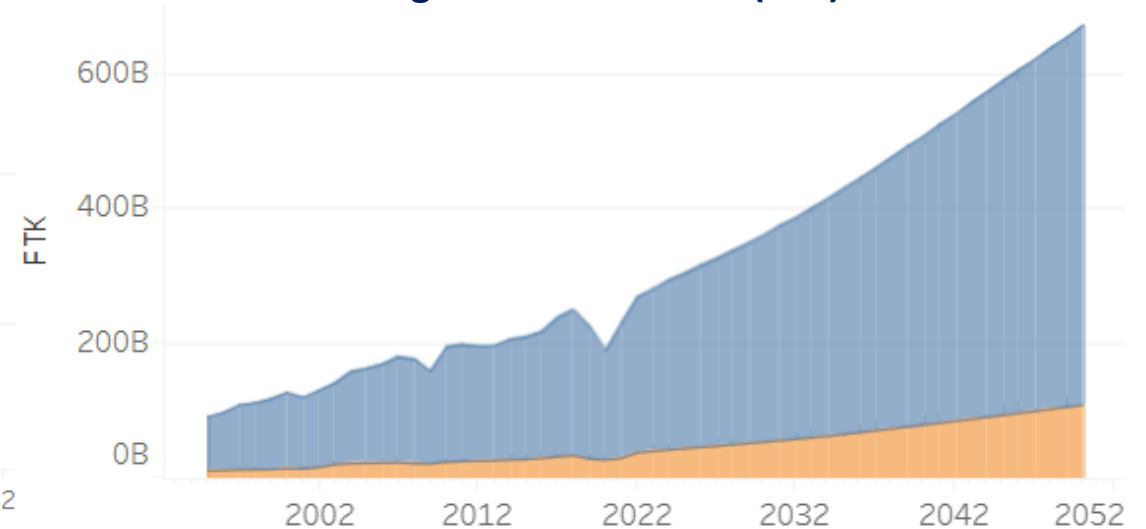
Long Term Traffic Forecasts (Asia/Pacific)

Passenger traffic forecast (RPK)



- Passenger traffic (RPK) CAGR* 2024-2050 forecast is 5.2%, 5.0% and 5.1% for international, domestic and total, respectively.

Cargo traffic forecasts (FTK)



- Cargo traffic (FTK) CAGR 2024-2050 forecast is 3.7% for total.

Source: ICAO Long Term Forecasts (CAGR = Compound Annual Growth Rate)

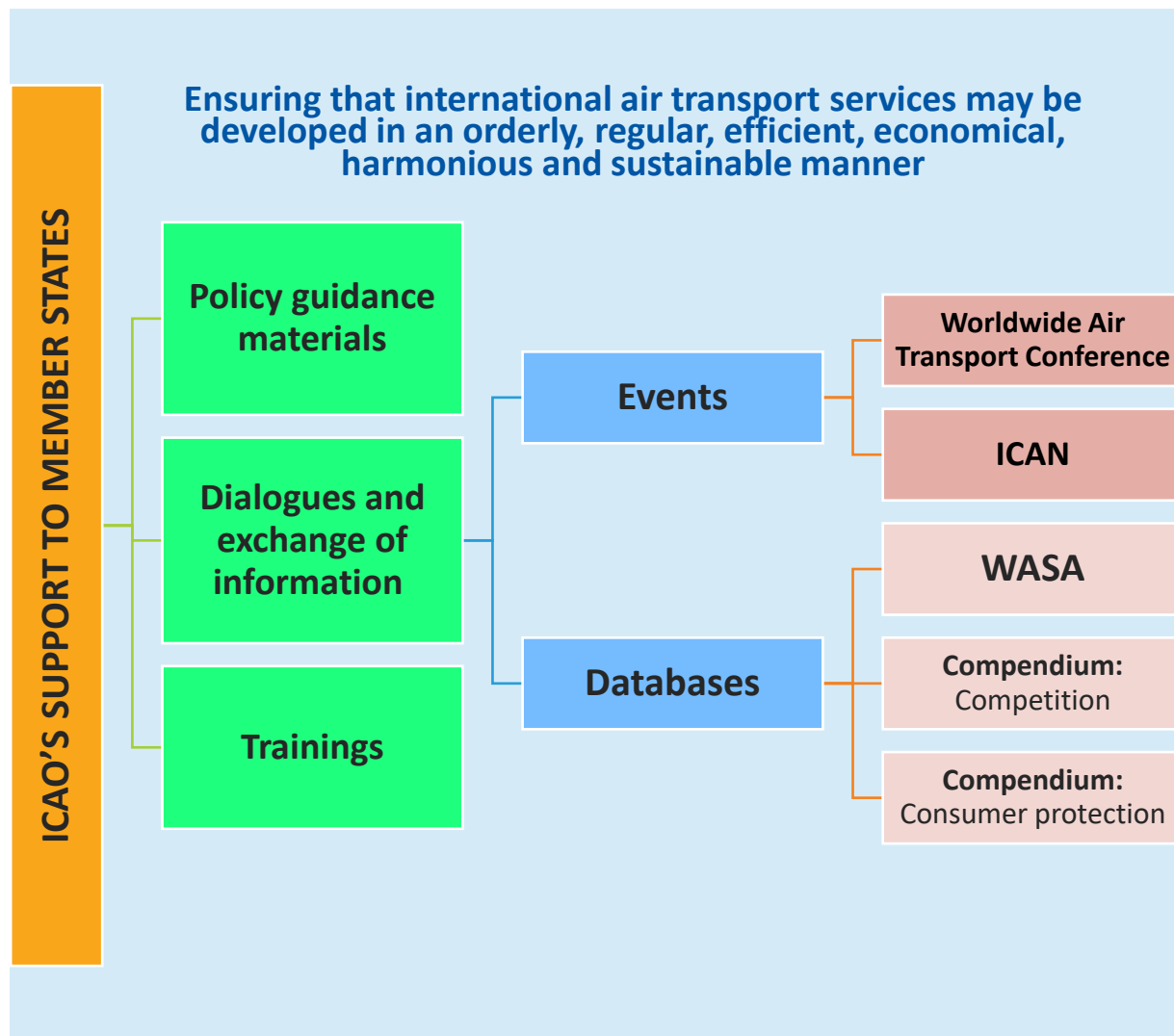


Air Transport Policy and Regulation

Air Transport Policy and Regulation

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ICAO's Long-term Vision for International Air Transport Liberalization



Doc 9587



Doc 9626



Doc 8632

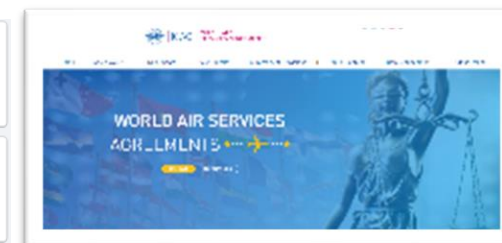
Air Transport Economics [ATE EN]: Online
Developed by International Civil Aviation Organization, Canada
English 6 Hours Online

Air Transport Economics for Airport Professionals [ATEAP EN]: Online
Developed by International Civil Aviation Organization, Canada
English 7 Hours Online

Air Transport Regulation [ATR EN]: Online
Developed by International Civil Aviation Organization, Canada
English 8 Hours Online

Air Transport Regulations Issues [ATRI EN]: Online
Developed by International Civil Aviation Organization, Canada
English 6 Hours Online

Introduction to Air Cargo Economics [IACE EN]: Online
Developed by International Civil Aviation Organization, Canada
English 2 Hours Online



Ongoing works by the Air Transport Regulation Panel (ATRP)

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✈ Recommendations of the Eighteenth Meeting of the ATRP (ATRP/18)



**Article 15 of Chicago
Convention**



Market Access



**ICAO Template Air
Services
Agreements**



**Economic
Guidance on
International
Operations of
Unmanned
Aircraft Systems
(UAS)**



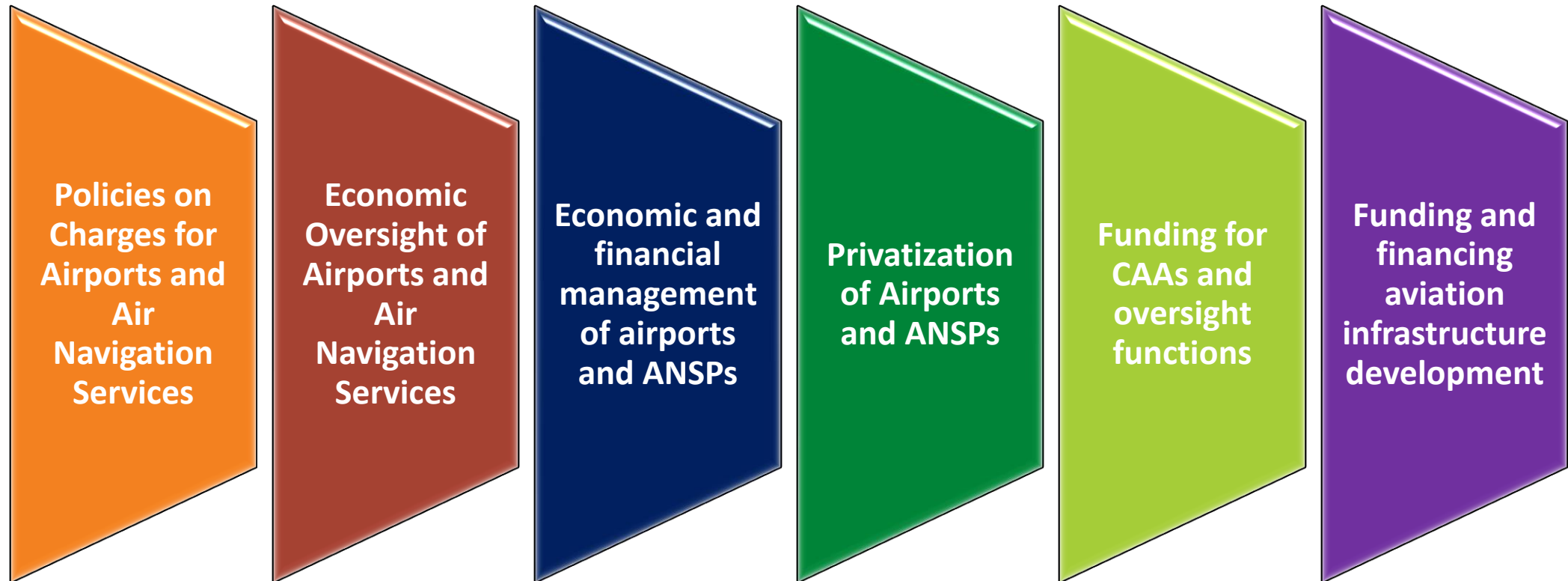
**Convening of the
Seventh
Worldwide Air
Transport
Conference
(ATConf/7)**

Aviation Infrastructure Management

Aviation Infrastructure Management

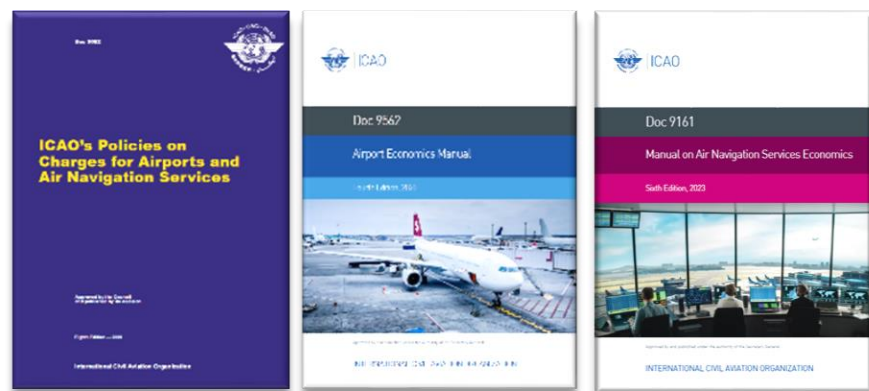
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Promoting the efficient development of aviation infrastructure



ICAO's policies and guidance on infrastructure management and implementation support

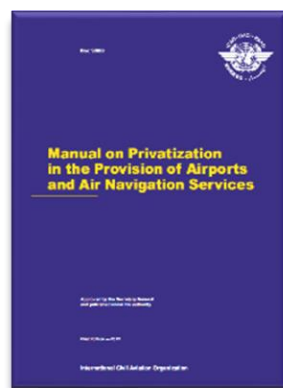
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Doc 9082

Doc 9562

Doc 9161

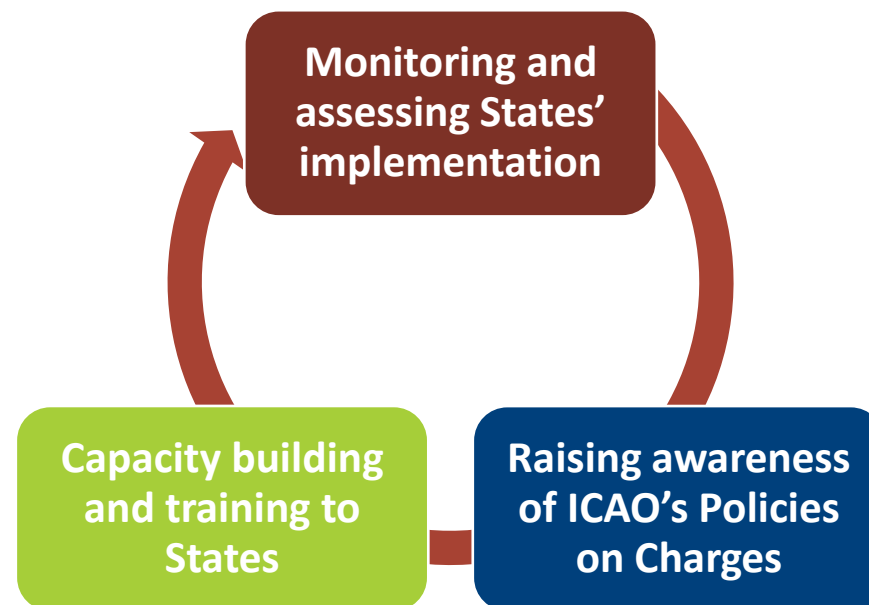


Doc 9980



Doc 10170

Implementation
Support



- **Doc 9082** – ICAO's Policies on Charges for Airports and Air Navigation Services
- **Doc 9562** – Airport Economics Manual
- **Doc 9161** – Manual on Air Navigation Services Economics
- **Doc 9980** – Manual on Privatization in the Provision of Airports and Air Navigation Services
- **Doc 10170** – Manual on Economic and Financial Analyses for Aviation Infrastructure Projects

Ongoing Activities of the Airport Economics Panel and the Air Navigation Services Economics Panel (AEP-ANSEP)

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Recommendations of the Tenth Joint Meeting of the Panels (AEP-ANSEP/10)

Invoicing practices for aeronautical charges and development of a minimum level of details in invoices

Development of policies and guidance on airport and air navigation services economics

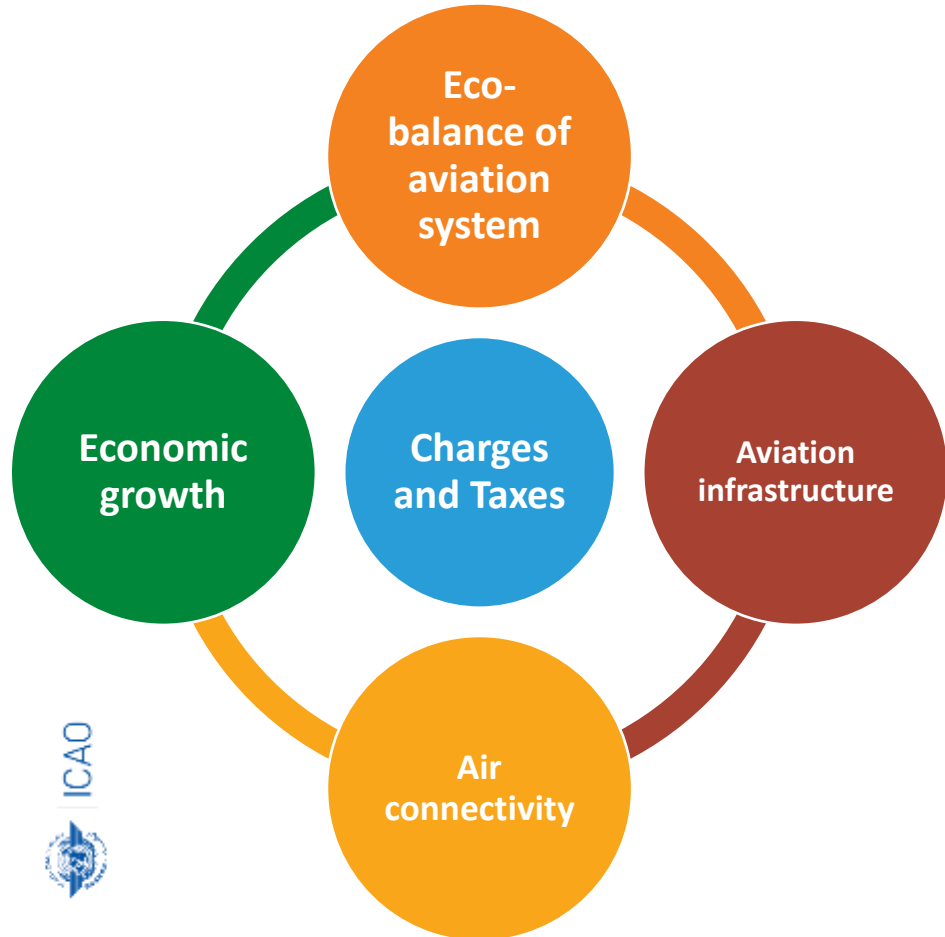
Sustainable funding for civil aviation authorities (CAAs) and States' oversight functions

Collaboration with the meteorological Panel (METP)

Cost recovery mechanisms for the operations of unmanned aircraft systems (UAS) and new entrants

Impact of charges and taxes on air transport development

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Charges

Implementation of ICAO's Policies on Charges for Airports and Air Navigation Services (Doc 9082)

Key charging principles: Non-discrimination, cost-relatedness, transparency and consultation with users

Balance between the interests of airports, ANSPs, airlines and passengers

Taxes

Implementation of ICAO's Policies on Taxation on International Air Transport (Doc 8632)

Consider the implication of taxes on the industry's contributions to national economy

Aviation Data and Analysis

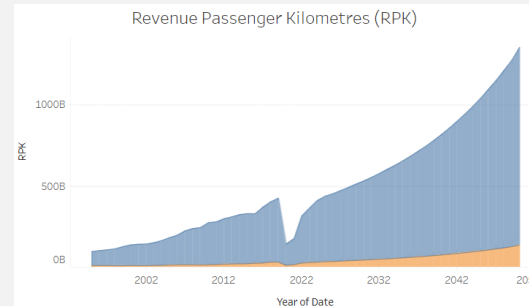
The work on Aviation Data and Analysis

Official aviation statistics with big data sources



A high-quality analytical foundation and enabling granular, timely insights into global aviation activity.

Long-term traffic forecast



A strategic tool for long-term planning, capacity building, and investment prioritization.

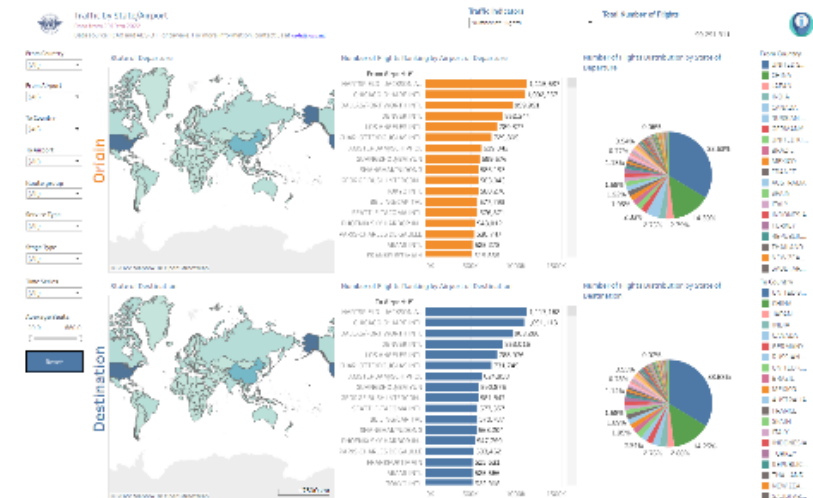
Analysis of aviation personnel by gender



To raise awareness of the still significant aviation gender gap, which will lead to better policy making.

ICAO Traffic and Economic Dashboards

- ✈ Interactive dashboards developed using Tableau platform, which provide **visualization** and **customized querying capabilities**.
- ✈ Covering a **wide array of analytics**:
 - Operations;
 - Fleet usage;
 - Long-term forecast;
 - Flight Information Region (FIR) traffic;
 - Revenue impact on airlines, airports and air navigation services providers (ANSPs) at different levels of granularity.
- ✈ Each Member State has been provided with a free license.



ICAO's support to States

ICAO's capacity building support to States

Online training

Air Transport Regulation online course

Air Transport Regulation Issues online course

Air Transport Economics online course

Air Transport Economics for Airport Professionals online course

Introduction to Air Cargo Economics

In-person/Virtual training

Joint ICAO-ACI training on Airport User Charges

Regional workshop/seminar

Trainings for Member States

Seventh Worldwide Air Transport Conference (ATConf/7)

Seventh Worldwide Air Transport Conference (ATConf/7)

Laying the Foundation of Global Aviation Sustainability

16-20 November 2026

Premier global forum that provides a vital platform for dialogue, cooperation, and policy development among Member States, industry stakeholders, and international organizations.





Thank You!