



| ICAO UNITING AVIATION

THE 2ND ICAO WORLD AVIATION FORUM

AVIATION PARTNERSHIPS FOR SUSTAINABLE DEVELOPMENT

MONTRÉAL, CANADA | 26 SEPTEMBER 2016



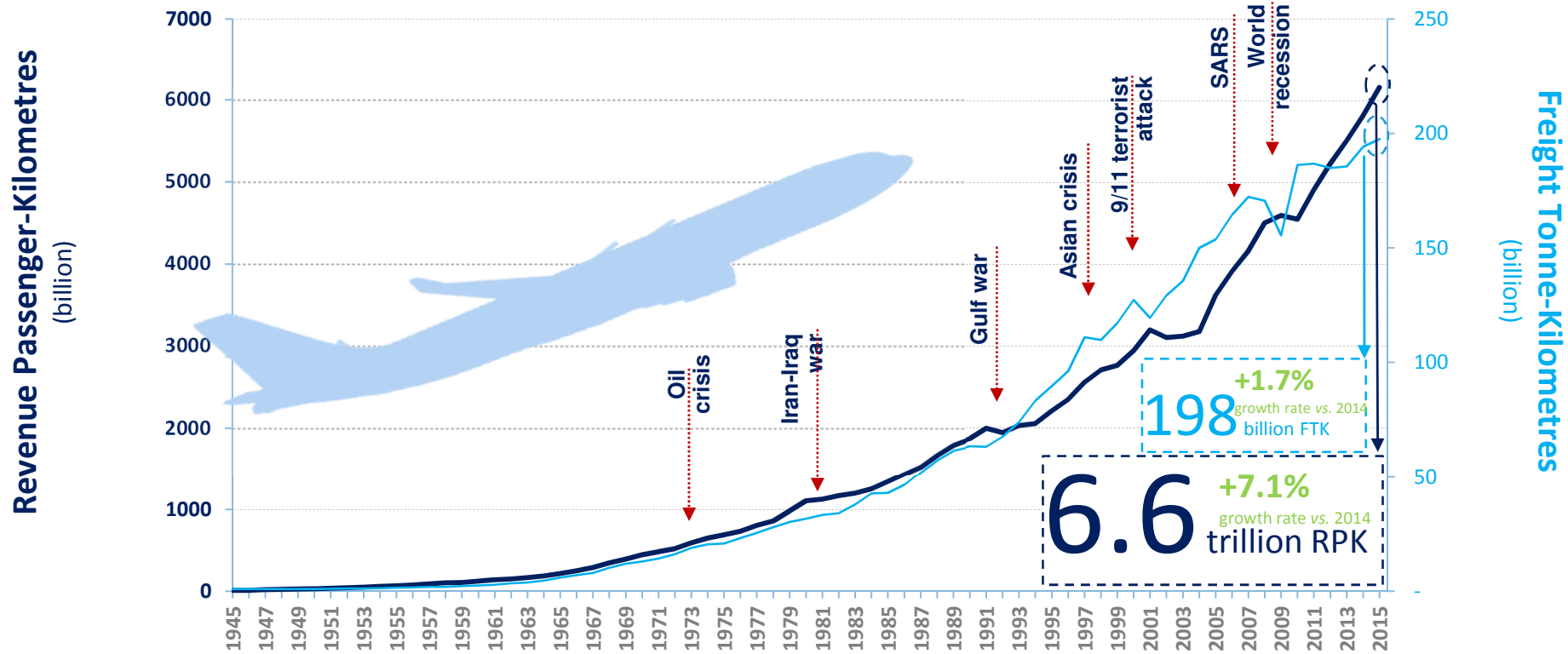
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Growth of air transport



Source: ICAO Annual Report of the Council

Scheduled commercial traffic
Total (international and domestic) services



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The size of aviation in 2015

- ✈ **40 million flights**
- ✈ **3.5 billion passengers**
- ✈ **51 million tonnes of freight**
- ✈ **Over 1 400 scheduled airlines**
- ✈ **More than 27 000 aircraft**
- ✈ **More than 4 130 airports**
- ✈ **173 air navigation centres**

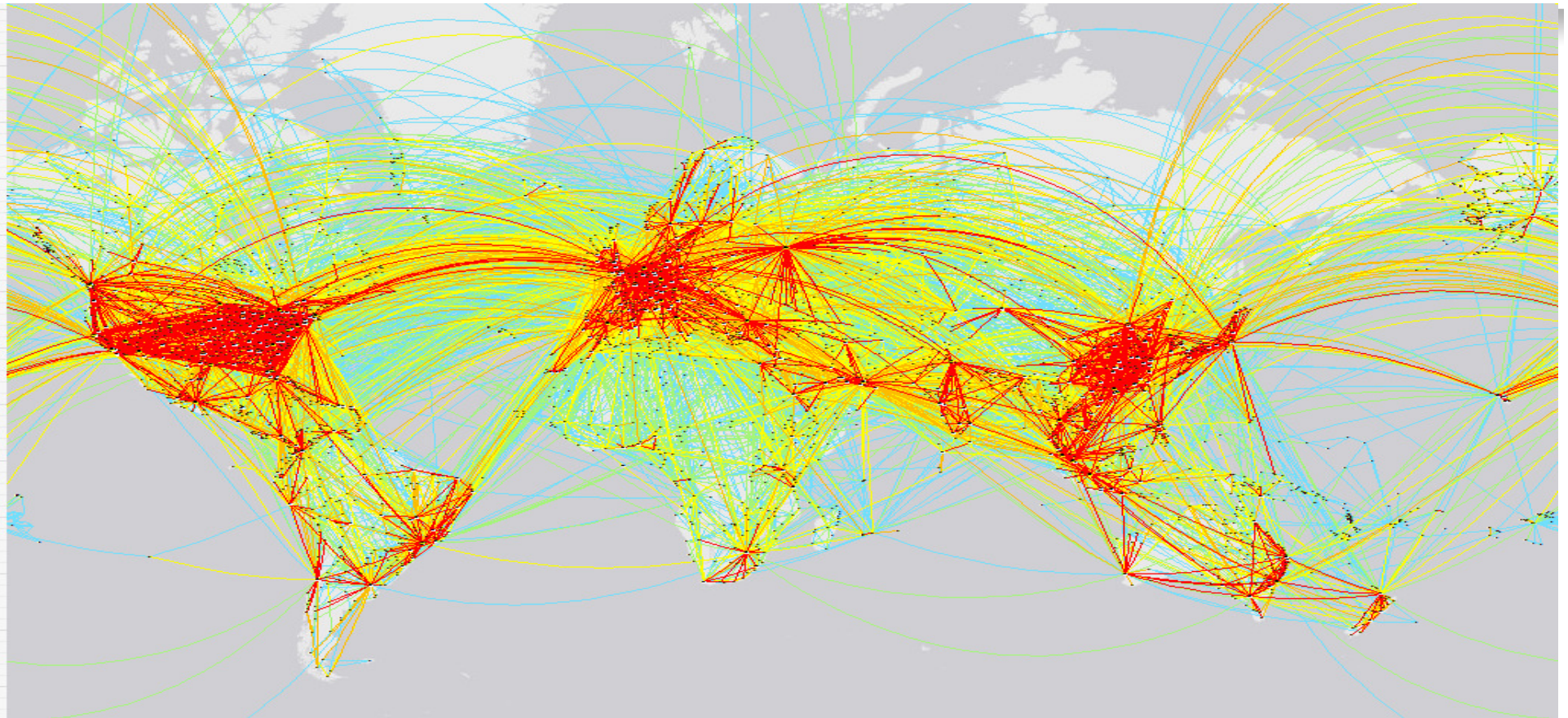
Traffic is for scheduled services



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Air route network 2015



Source: ICAO



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Economic benefits of aviation in 2015

**Direct economic contribution
of the aviation sector**

10.0 million

***Direct jobs** supported by aviation worldwide*

\$718 billion

Direct** Global **economic impact

**Direct, indirect, induced and
tourism economic contribution of
the aviation sector**

63.5 million

***Jobs** supported by aviation worldwide*

\$2.7 trillion

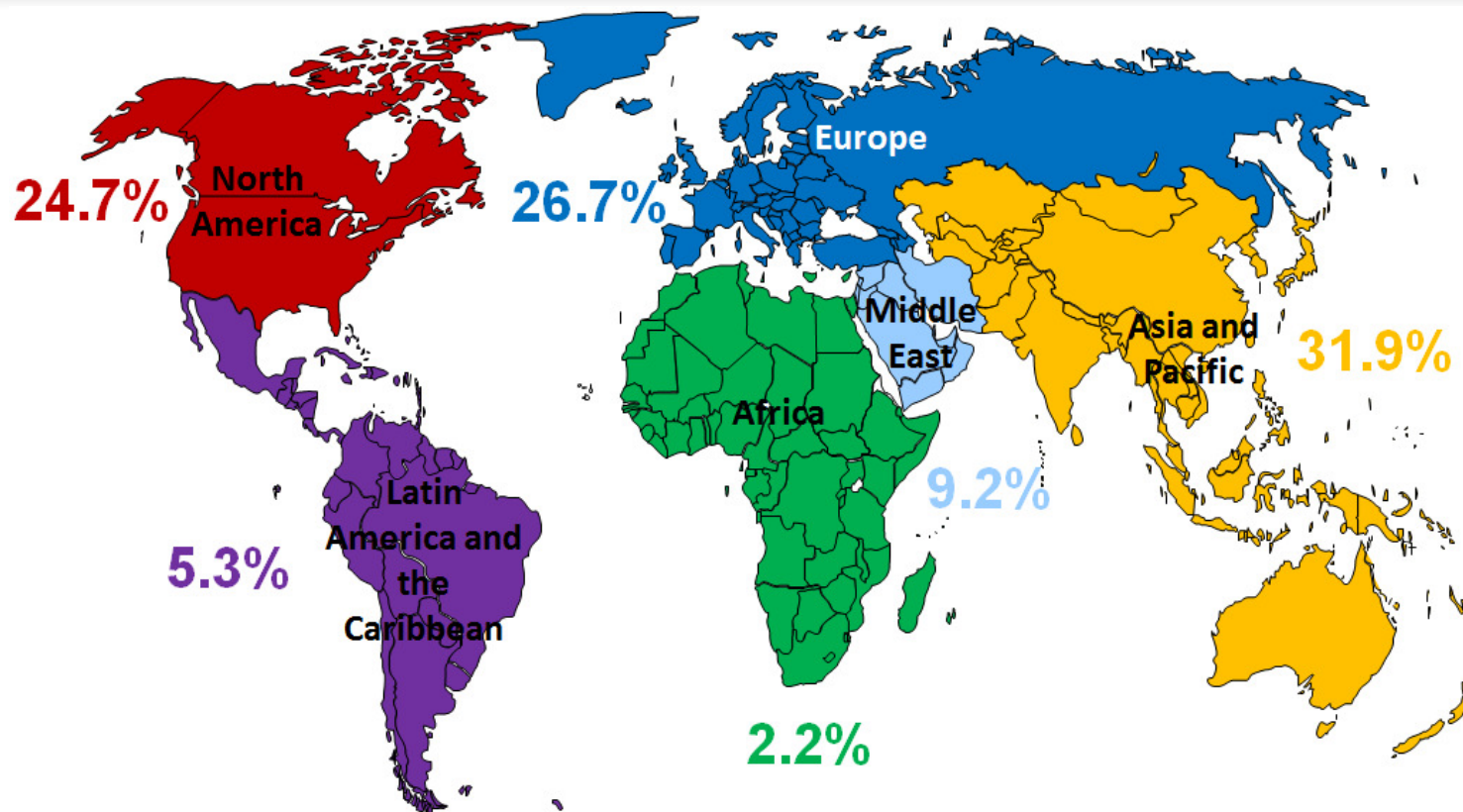
*Global **economic impact***



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Share of Revenue Passenger-Kilometres by region in 2015



Source: ICAO

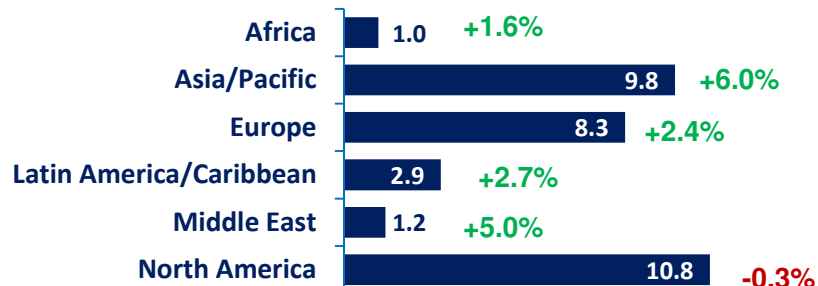


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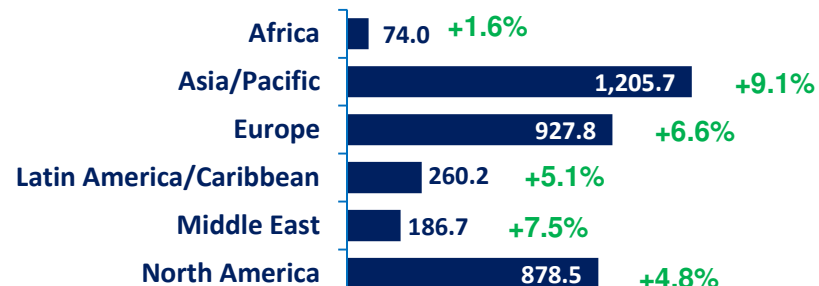
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Air transport by region in 2015

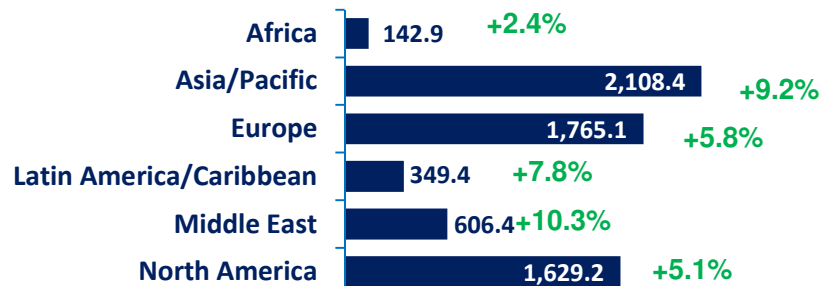
Aircraft departures (million)



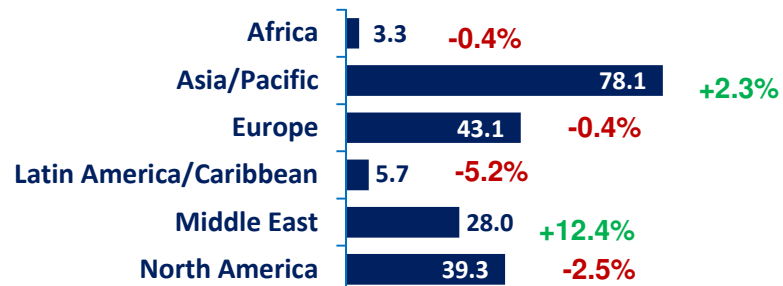
Passengers carried (million)



Revenue Passenger-Kilometres (billion)



Freight Tonne-Kilometres (billion)





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Traffic rankings in 2014-15

International Scheduled Revenue Tonne-Kilometres (RTK)

Rank	State of AOC	RTK 2014	RTK share (%)	Cumulative (%)
1	China (1)	62,661,657,151	11.76083%	11.76083%
2	United States	62,359,064,486	11.70404%	23.46486%
3	United Arab Emirates	46,892,720,885	8.80119%	32.26605%
4	United Kingdom	30,158,001,753	5.66029%	37.92634%
5	Germany	28,814,799,214	5.40819%	43.33453%
6	Republic of Korea	20,764,711,405	3.89728%	47.23181%
7	Singapore	18,511,391,369	3.47436%	50.70617%
8	France	17,732,411,000	3.32816%	54.03433%
9	Netherlands	15,962,395,348	2.99595%	57.03028%
10	Japan	14,581,032,148	2.73668%	59.76696%
11	Qatar	14,293,445,230	2.68271%	62.44967%
12	Turkey	13,771,403,581	2.58472%	65.03439%
13	Canada	11,983,608,812	2.24918%	67.28357%
14	Ireland	11,868,967,019	2.22766%	69.51123%
15	Russian Federation	11,802,890,290	2.21526%	71.72649%
16	Malaysia	9,593,485,831	1.80058%	73.52707%
17	Australia	8,855,781,434	1.66212%	75.18919%
18	Thailand	8,473,871,575	1.59044%	76.77963%
19	Spain	7,995,446,551	1.50065%	78.28028%
20	India	6,510,575,876	1.22196%	79.50223%

Rank	State of AOC	RTK 2015	RTK share (%)	Cumulative (%)
1	China (1)	70,403,245,196	12.42421%	12.42421%
2	United States	61,944,119,667	10.93141%	23.35562%
3	United Arab Emirates	52,100,507,516	9.19429%	32.54991%
4	United Kingdom	31,065,034,269	5.48211%	38.03203%
5	Germany	30,507,251,927	5.38368%	43.41571%
6	Republic of Korea	21,802,605,943	3.84755%	47.26326%
7	Singapore	18,615,753,428	3.28516%	50.54842%
8	France	18,295,414,100	3.22863%	53.77705%
9	Qatar	17,359,871,880	3.06353%	56.84059%
10	Netherlands	15,732,743,524	2.77639%	59.61698%
11	Turkey	15,587,345,360	2.75073%	62.36771%
12	Japan	15,527,311,664	2.74014%	65.10785%
13	Ireland	13,165,546,390	2.32335%	67.43120%
14	Canada	13,040,382,256	2.30126%	69.73246%
15	Russian Federation	11,635,019,200	2.05326%	71.78572%
16	Australia	9,368,848,020	1.65334%	73.43906%
17	Spain	9,215,837,003	1.62634%	75.06540%
18	Thailand	9,113,598,830	1.60830%	76.67370%
19	Malaysia	8,966,590,598	1.58235%	78.25605%
20	India	6,994,194,840	1.23428%	79.49033%



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Top 25 airports in 2015 passenger traffic

Rank No.	City and airport code	Passenger (thousand)		2015/2014 (%)	Movements (thousand)		2015/2014 (%)
		2015	2014		2015	2014	
1	Atlanta (ATL)	101,491	96,179	5.5	882	868	1.7
2	Beijing (PEK)	89,939	86,128	4.4	590	582	1.4
3	Dubai (DXB)	78,015	70,476	10.7	407	357	13.9
4	Chicago (ORD)	76,950	69,999	9.9	875	882	-0.8
5	Tokyo (HND)	75,573	72,827	3.8	439	426	2.9
6	London (LHR)	74,990	73,408	2.2	474	473	0.2
7	Los Angeles (LAX)	74,937	70,663	6.0	656	637	2.9
8	Hong Kong (HKG)	68,488	63,122	8.5	406	391	3.8
9	Paris (CDG)	65,767	63,814	3.1	476	471	1.0
10	Dallas/Fort Worth (DFW)	64,174	63,554	1.0	681	680	0.2
11	Istanbul (IST)	61,323	56,716	8.1	447	440	1.6
12	Frankfurt (FRA)	61,032	59,566	2.5	468	469	-0.2
13	Shanghai (PVG)	60,098	51,688	16.3	449	402	11.7
14	Amsterdam (AMS)	58,285	54,978	6.0	466	453	2.8
15	New York (JFK)	56,827	53,255	6.7	439	422	4.0
16	Singapore (SIN)	55,449	54,093	2.5	351	347	1.2
17	Guangzhou (CAN)	55,202	54,780	0.8	410	412	-0.6
18	Jakarta (CGK)	54,054	57,221	-5.5	380	391	-2.8
19	Denver (DEN)	54,015	53,473	1.0	548	566	-3.2
20	Bangkok (BKK)	52,384	46,423	12.8	320	294	8.8
21	San Francisco (SFO)	50,058	47,115	6.2	430	432	-0.5
22	Incheon (ICN)	49,413	45,662	8.2	308	293	5.2
23	Kuala Lumpur (KUL)	48,929	48,930	0.0	353	341	3.6
24	Madrid (MAD)	46,780	41,834	11.8	367	343	7.0
25	New Delhi (DEL)	45,982	39,753	15.7	349	324	7.9

Source: ICAO Annual Report of the Council, ACI

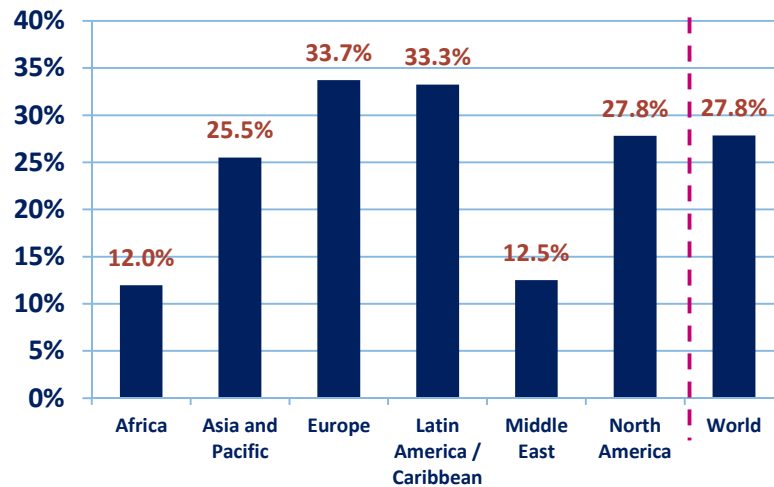


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Low-cost carriers (LCCs) stimulating traffic

Share of passengers carried by LCCs in 2015



Passenger number growth for LCCs and other carriers

	2014	2015
LCCs	9.8%	10.3%
Others	4.2%	5.5%
Total	5.7%	6.8%

LCCs growth has been consistently twice as
much as other carriers' growth



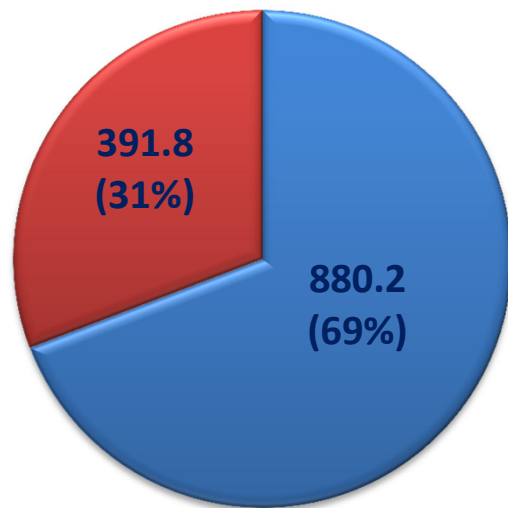
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Passenger Flow: Direct vs indirect flights

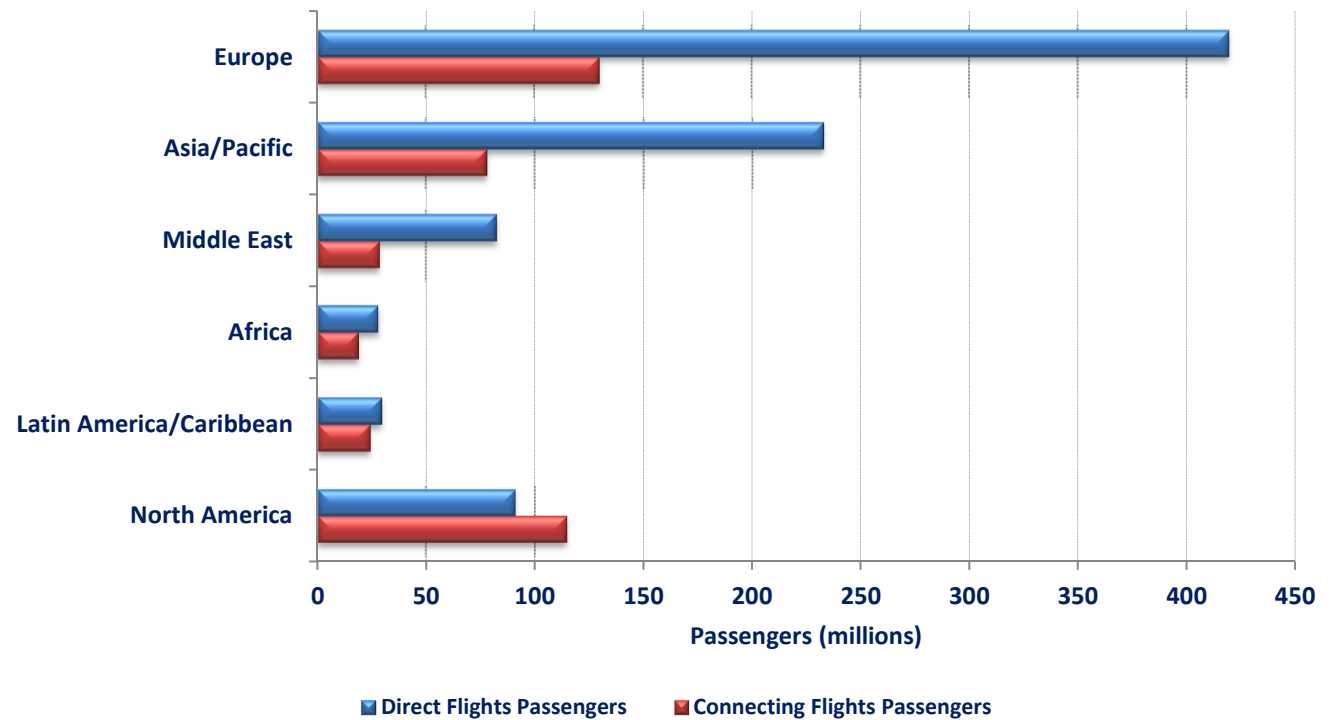
International Passenger
Flow 2015 (In millions)

Total Passengers: 1271.9



■ Direct Flights Passengers
 ■ Connecting Flights Passengers

Passengers Flow by Region of Departure 2015

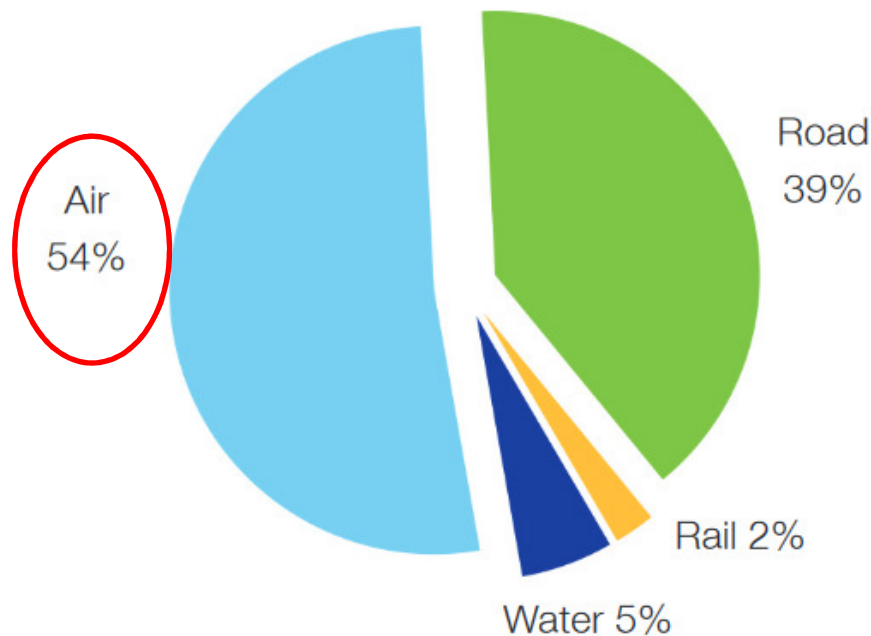




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More than half of international tourists arrive by air



- Tourism expansion relies heavily on air transport, providing substantial economic benefits for anyone involved in the value chain of tourism
- Separate sectorial policies on air transport and tourism result in a fundamental, and too often even conflicting disconnect which constitutes a severe constraint on the development of travel and tourism

Inbound tourism by mode of transport in 2014

Source: World Tourism Organization (UNWTO)

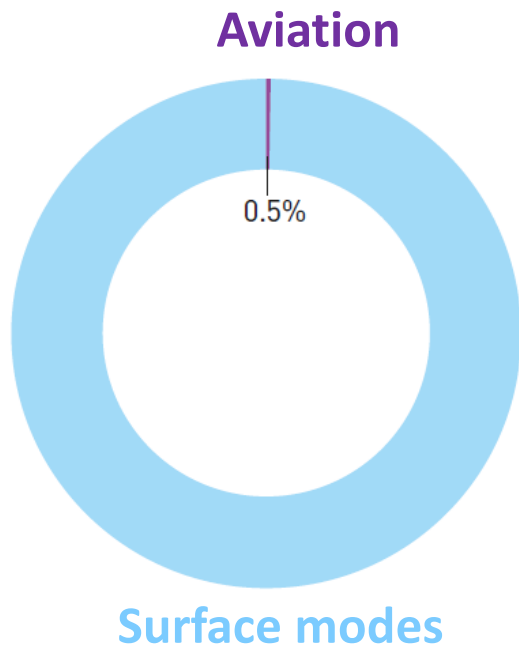


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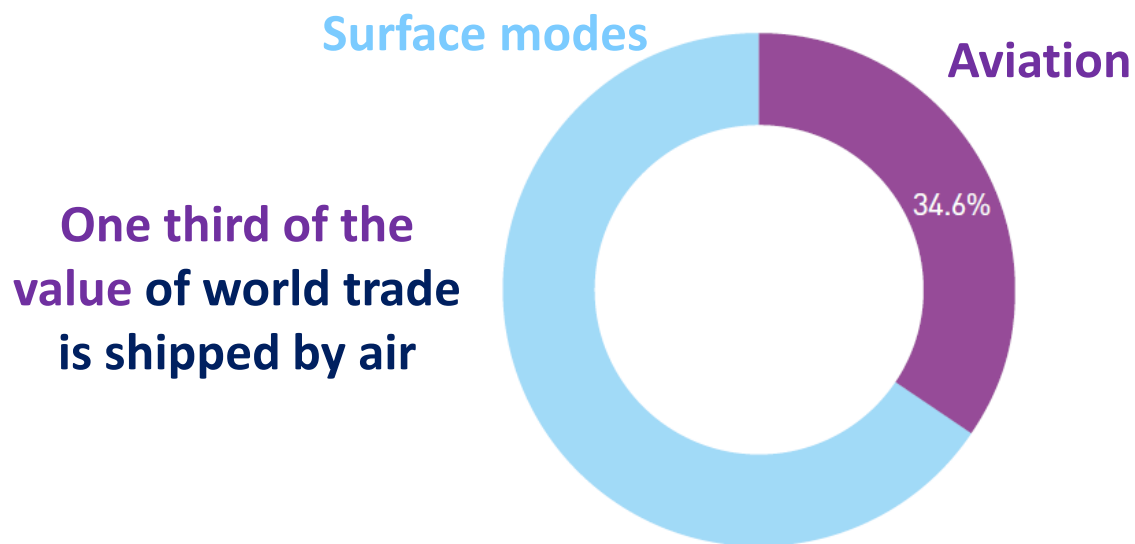
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International cargo shipment

Volume of world international cargo shipment



Value of world international cargo shipment



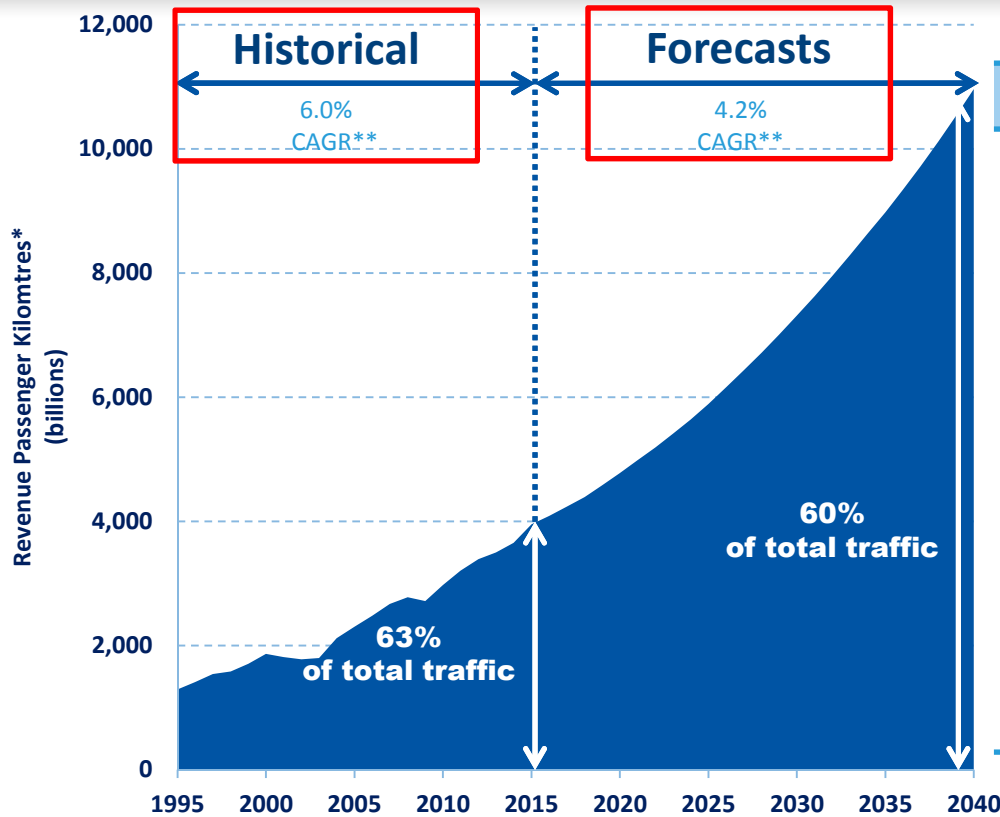


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Long-term air traffic forecasts

Scheduled international passenger traffic



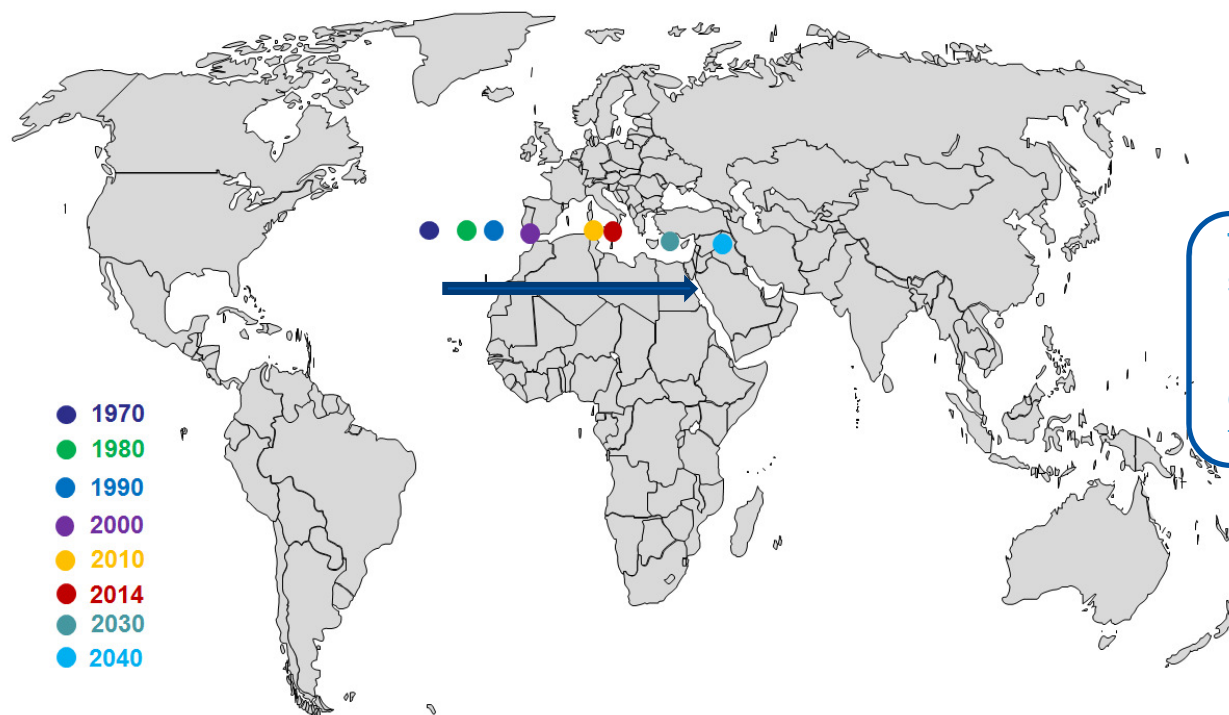
Projected Top 10 Routes 2040

Rank 2040	Rank 2015	Long Term Forecast Route Group	Share 2040	Share 2015
1	4	Central Southwest Asia - Pacific South East Asia	11.9%	5.4%
2	1	Intra Europe	11.5%	15.8%
3	8	Central Southwest Asia - Middle East	11.3%	3.9%
4	2	Europe - North America	9.0%	11.8%
5	3	Central Southwest Asia - Europe	7.3%	5.8%
6	5	Intra Pacific South East Asia	6.1%	4.5%
7	7	Central Southwest Asia - North America	5.9%	4.1%
8	18	Central Southwest Asia- North Asia	4.6%	1.9%
9	6	Europe - Middle East	3.6%	4.5%
10	9	Europe - Pacific South East Asia	3.5%	3.6%

*Scheduled Services **Compound Average Annual Growth Rate



Centre of gravity



The centre of gravity has been steadily moving from the middle of North Atlantic to the middle of the Mediterranean sea in the last four decades. It is expected to move further east by 2040.

Geographical centre of gravity of departing/arriving passengers