



ICAO

INTERNATIONAL CIVIL AVIATION ORGANIZATION

A UN SPECIALIZED AGENCY

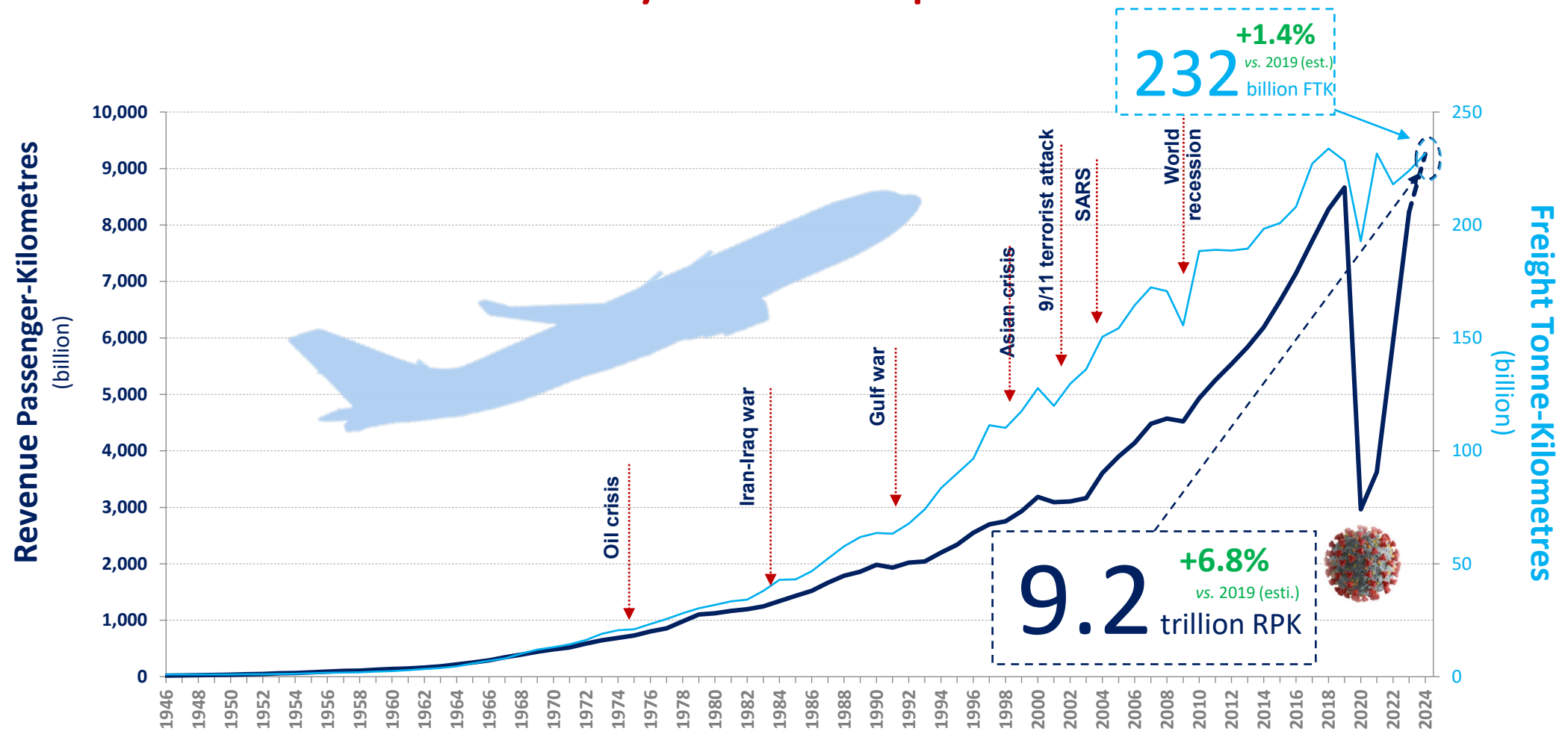
Thirteenth North American, Central American and Caribbean Directors of Civil Aviation Meeting
(NACC/DCA/13)

P/04 Agenda Item 7
Air Transport Updates

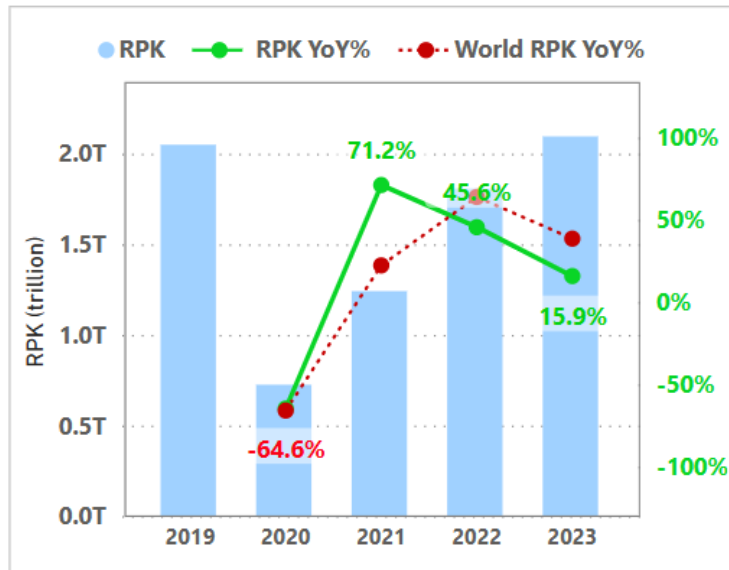
Presented by the Secretariat

State of industry

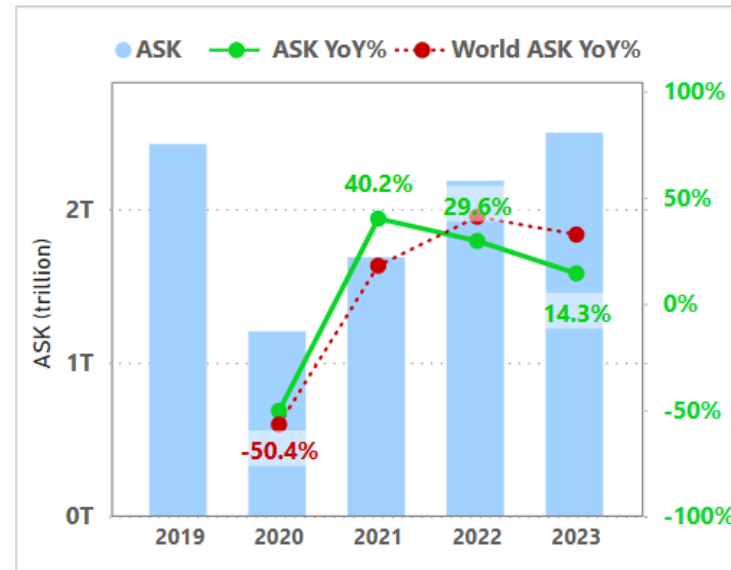
Global traffic: A recovery from the pandemic shock



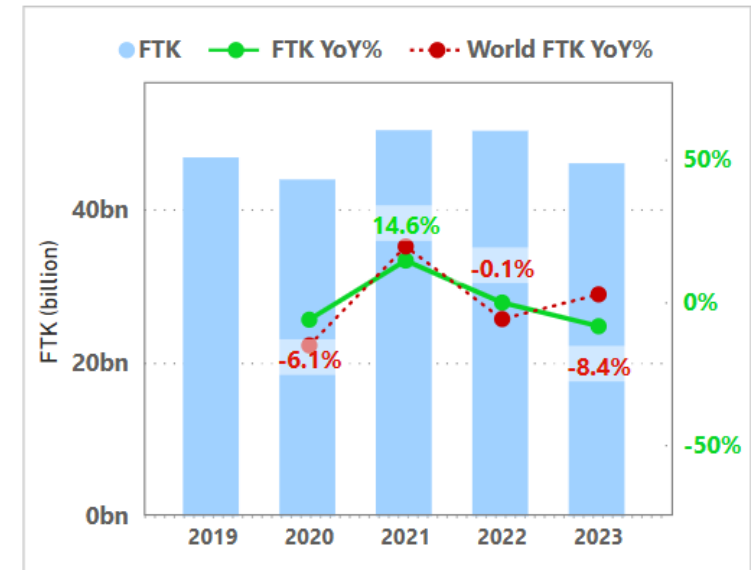
NACC Traffic Trends



- Passenger traffic in Revenue Passenger-Kilometres (RPKs) increased by +16% in 2023.



- Seat Capacity in Available Seat-Kilometres (ASKs) increased by +14% in 2023.

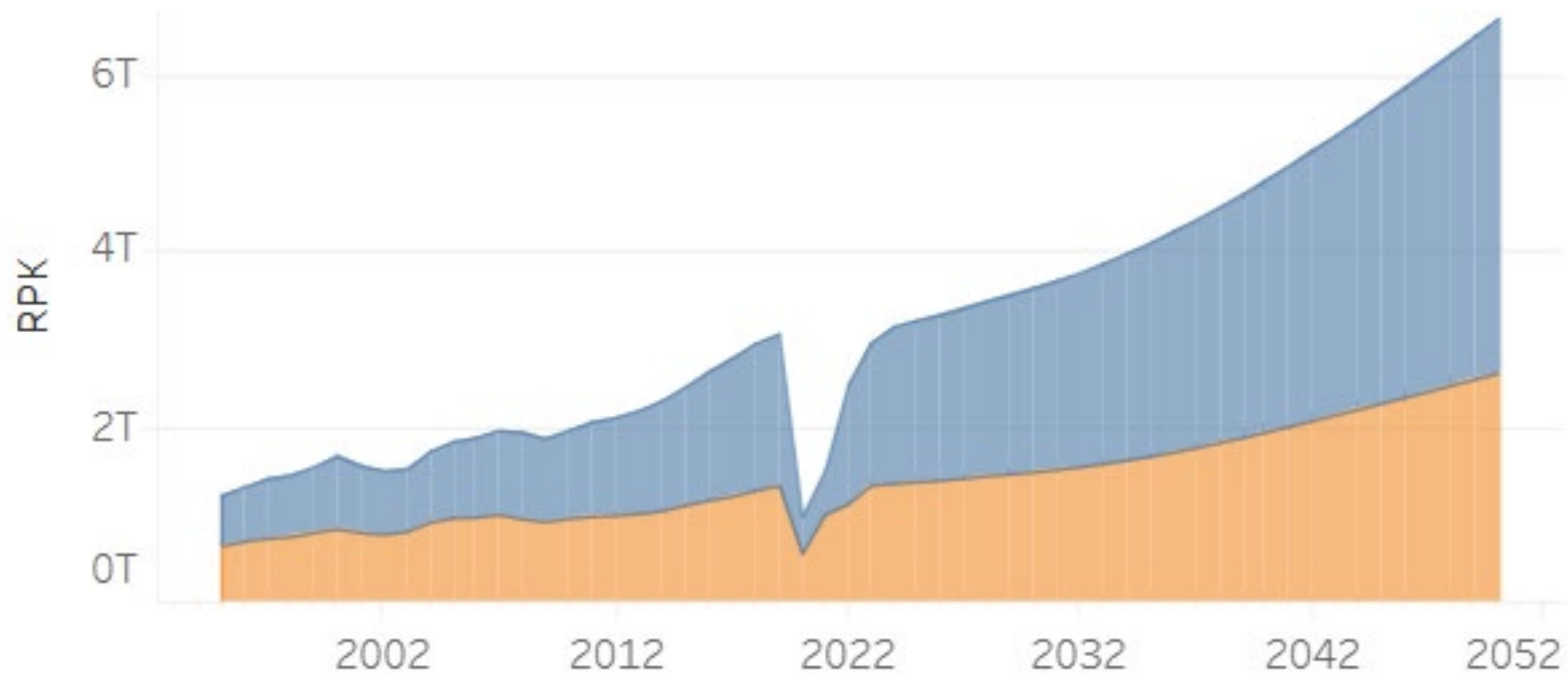


- Cargo traffic measures in Freight Tonnes-Kilometres (FTKs) decreased by -8% in 2023.

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

Long-Term Traffic Forecasts (NACC)

Passenger traffic forecast (RPK)



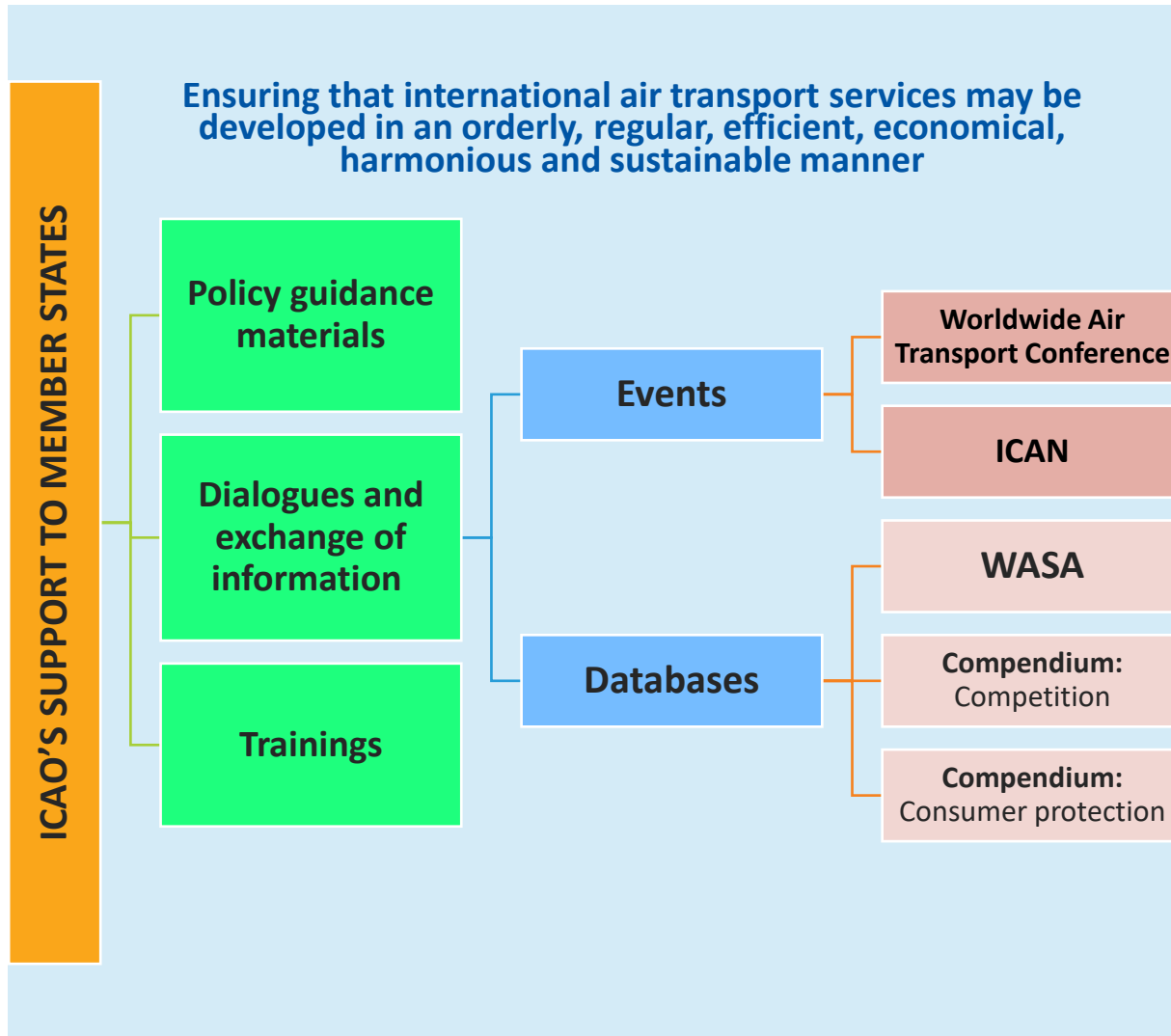
- Passenger traffic (RPK) CAGR* 2024-2050 forecast is 3.2%, 2.6% and 2.9% for international, domestic and total, respectively.

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

Air Transport Policy and Regulation

Air Transport Policy and Regulation

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



Doc 9587

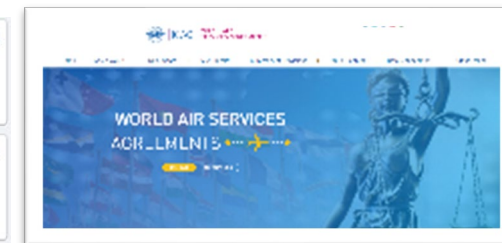


Doc 9626



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)

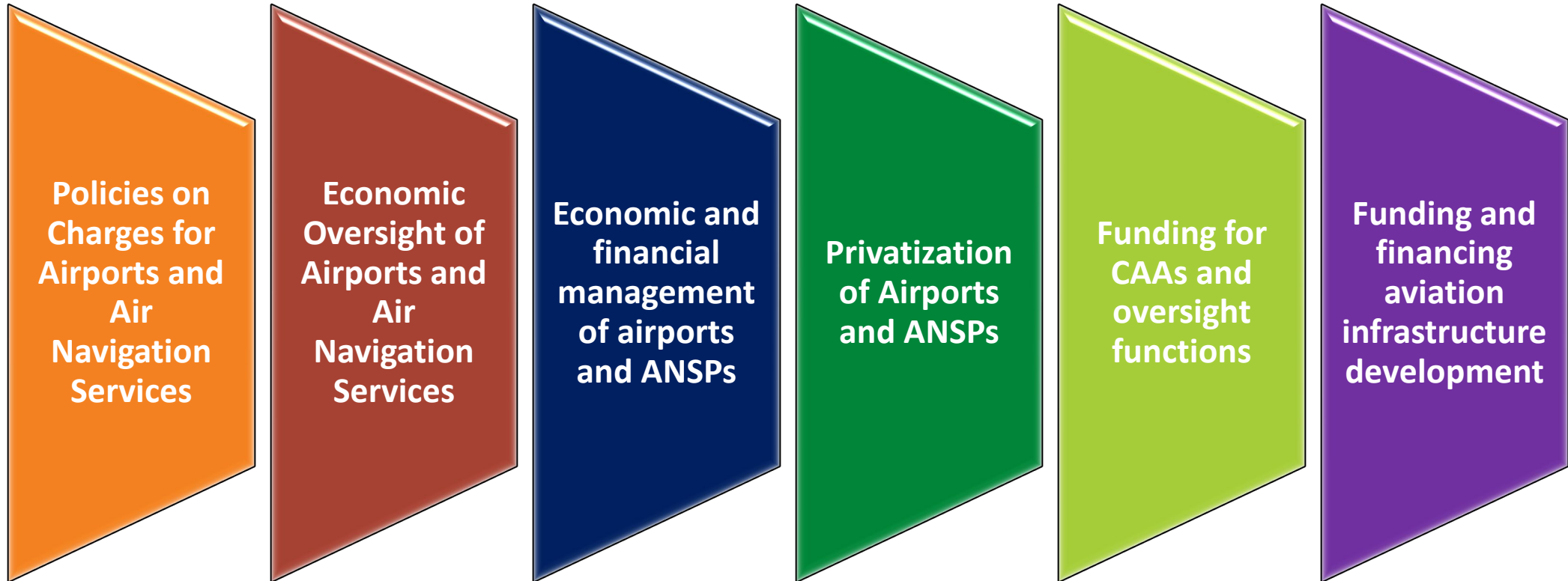
✈ Recommendations of the Eighteenth Meeting of the ATRP (ATRP/18)



Aviation Infrastructure Management

Aviation Infrastructure Management

Promoting the efficient development of aviation infrastructure



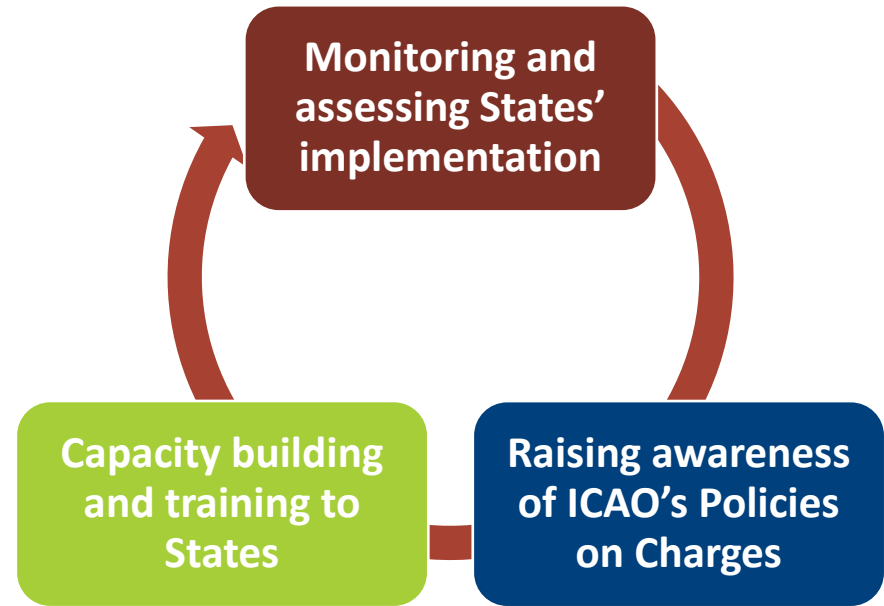
ICAO's policies and guidance on infrastructure management and implementation support



Doc 9082

Doc 9562

Doc 9161



Doc 9980

Doc 10170

- **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)

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

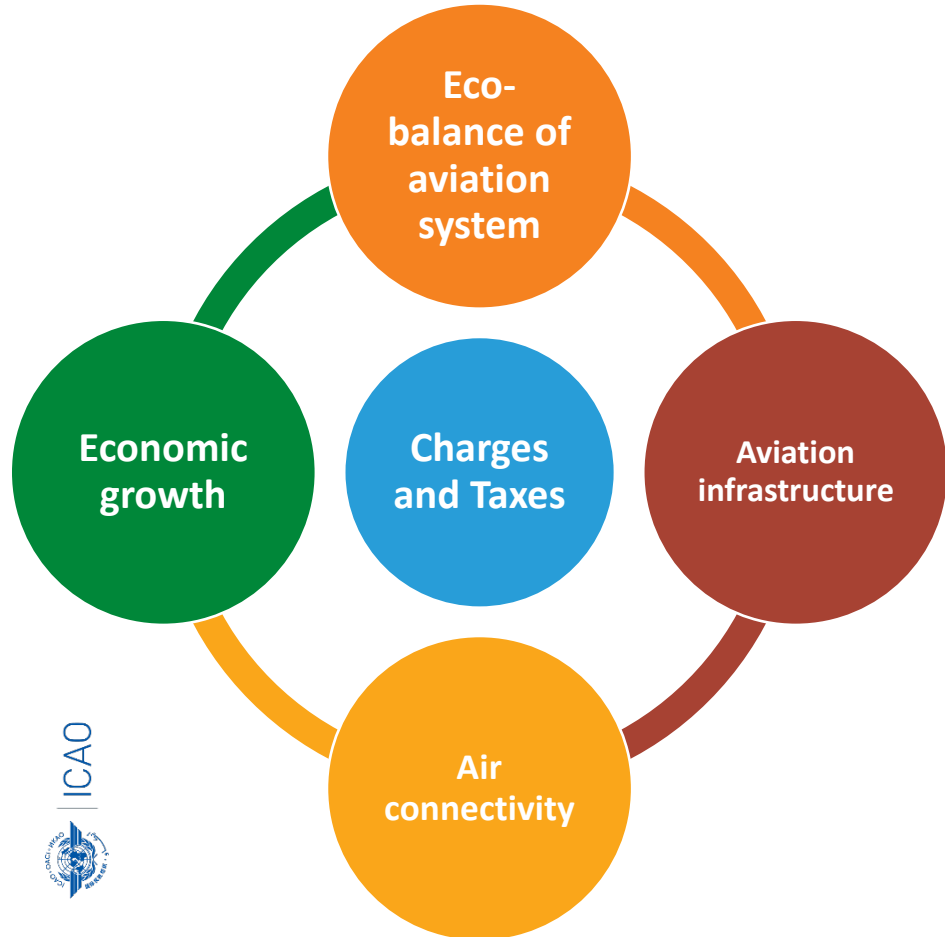
Sustainable funding for civil aviation authorities (CAAs) and States' oversight functions

Collaboration with the meteorological Panel (METP)

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

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

Impact of charges and taxes on air transport development



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

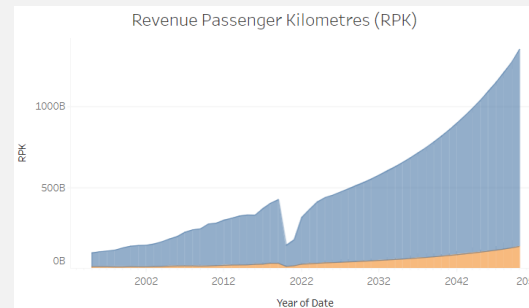
The work on Aviation Data and Analysis

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.

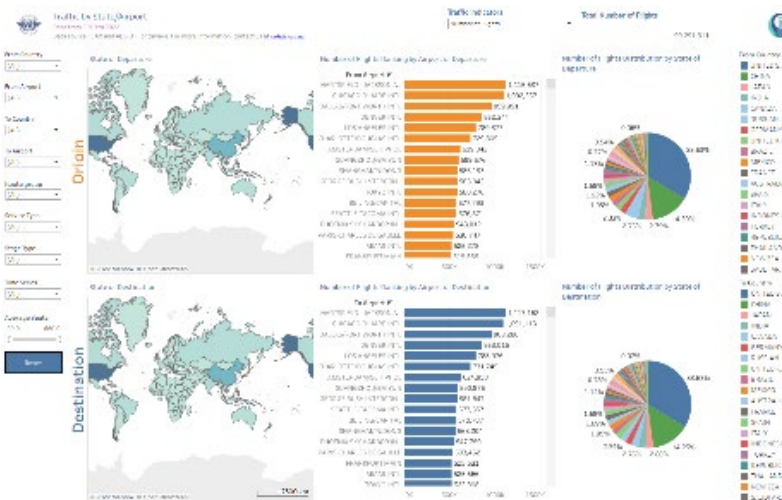
Analysis of aviation personnel by gender



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. For further information, please contact ada2@icao.int.



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

The Seventh Worldwide Air Transport Conference (ATConf/7)

The Worldwide Air Transport Conference (ATConf)

Background

Global forum for policy and decision making that determines measures to improve economic regulatory environment

Six such Conferences were organized in the past.

Latest: ATConf/6 - held in 2013

ATConf

Since ATConf/6, many significant changes have taken place within the international air transport industry

States and ICAO have an important role in creating a conducive economic environment

ATConf/7

Date

- 16 to 20 November 2026

Venue

- Montreal, Canada



ATConf/7: Expected outcomes

Theme: Laying the Foundation of Global Aviation Sustainability

Expected outcome from ATConf/7



Establishing a strategic foundation for global aviation economic sustainability



Modernizing and enhancing economic regulatory frameworks for key air transport issues



Navigating emerging trends in the global air transport industry through insights and policy guidance



Strengthening industry resilience to emerging and unforeseen challenges

Input from Member States

State letter will be issued to seek input from Member States on the Concept Note of ATConf/7

Concept Note outlining the proposed focus areas for the Conference and intended to serve as the guide for developing the meeting agenda and identifying key issues for discussion at the Conference

Input from Member States will be instrumental in ensuring that the Conference reflects the priorities and perspectives of all Member States

NACC Regional Office Updates on Economic Development of Air Transport

NACC Strategic Assistance Programme (SAP) ⁴

- ✓ Maintain the initiative in response to the ICAO “NO COUNTRY LEFT BEHIND” Campaign;
- ✓ Establish a **Political Commitment** through the establishment of the **Country Strategic Plan of Action (COSPA)** or other means of commitment with NACC ICAO;
- ✓ Assists States in implementing **ICAO SARPs**, also to resolve **Significant Concerns (SSCs and SSeCs)**.
- ✓ Cover **all areas of international civil aviation**;
- ✓ **Coordination, collaboration and synergy** of effort between all partners.
- ✓ Shift to a **strategic approach** in State assistance that still incorporates a **systemic evaluation of needs and feasibility**.



- ✈ NACC/DCA/12 meeting adopted its conclusion NACC/DCA/12/11 **IMPROVING AIR TRANSPORT ACTIONS IN THE CAR REGION**
- ✈ ICAO aviation forecasting, economic planning, and statistics and data sharing/information- ATRFs
- ✈ Foster Air Transport initiatives to enhance air liberalization implementation and the enhancement of air transport connectivity among CAR States
 - **1st Meeting of national civil aviation authorities of the Greater Caribbean and Airline representatives:**
 - **OAS Meeting**
 - **eFTU4All Pilot Project**
 - **Collaboration with UN and International organizations**
 - **ICAN 2025**

NACC Project Proposals toward enhancing Air Transport in the CAR Region

To improve air connectivity and air transport liberalization in the Central American and Caribbean States, these proposals include a comprehensive set of activities aimed at addressing infrastructure, regulatory frameworks, institutional capacity, and regional cooperation through the following modules in three phases for supporting all the CAR States:

Technical Assistance for enhancing Air Connectivity and Air Transport Liberalization in Central America

Technical Assistance for enhancing Air Connectivity and Air Transport Liberalization in the Eastern Caribbean/ CARICOM area



Thank You!

