



| ICAO

INTERNATIONAL CIVIL AVIATION ORGANIZATION

A UN SPECIALIZED AGENCY



ICAO/LACAC Capacity Building Workshop on Air Transport Economic Regulation and Oversight

STATE OF THE AIR TRANSPORT INDUSTRY

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Economic Regulatory Framework Section

ICAO

THE CHICAGO CONVENTION



SAFE SKIES.
SUSTAINABLE
FUTURE.



Doc 7300/9



**Convention on
International Civil Aviation**

**Convention relative à
l'aviation civile internationale**

**Convenio sobre
Aviación Civil Internacional**

**Конвенция о международной
гражданской авиации**

This document supersedes Doc 7300/8.
Le présent document annule et remplace le Doc 7300/8.
Este documento reemplaza el Doc 7300/8.
Настоящий документ заменяет Doc 7300/8.

Ninth Edition – Neuvième édition – Novena edición – Издание девятое — 2006

International Civil Aviation Organization
Organisation de l'aviation civile internationale
Organización de Aviación Civil Internacional
Международная организация гражданской авиации

Preamble

THEREFORE, the undersigned governments having agreed on certain principles and arrangements in order that international civil aviation may be developed in a safe and orderly manner and that international air transport services may be established on the basis of equality of opportunity and operated soundly and economically

Article 44

d) Meet the needs of the peoples of the world for safe, regular, efficient and economical air transport.



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State of the Industry

Pre-COVID-19
Pandemic

Pandemic
impact

Recovery
overview

Long-term
outlook

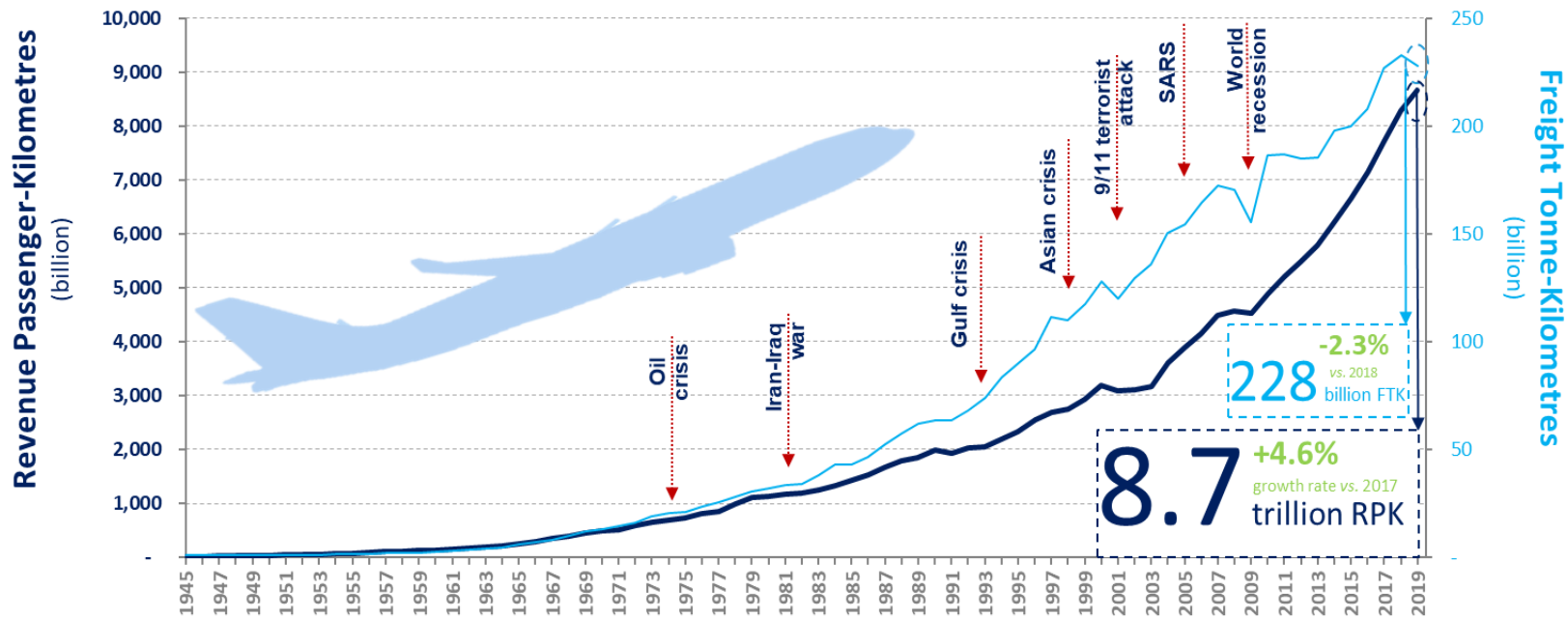


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State of Air Transport Industry - Pre-COVID-19

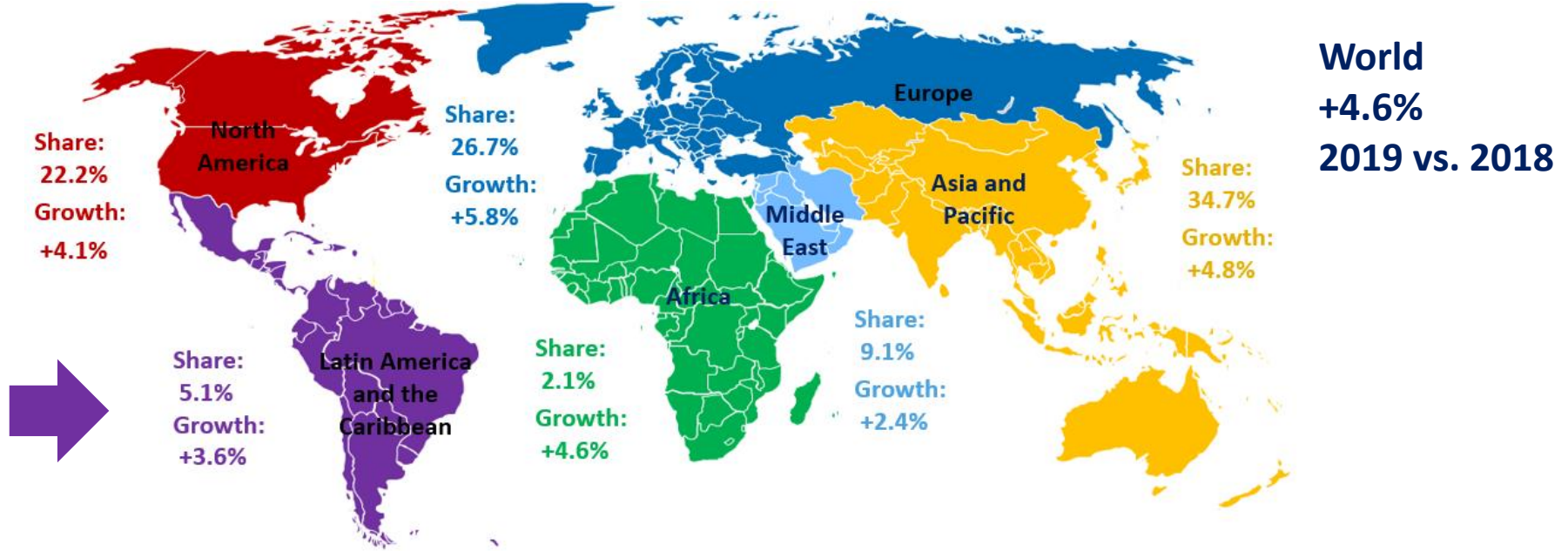
Growth of air transport pre-COVID-19



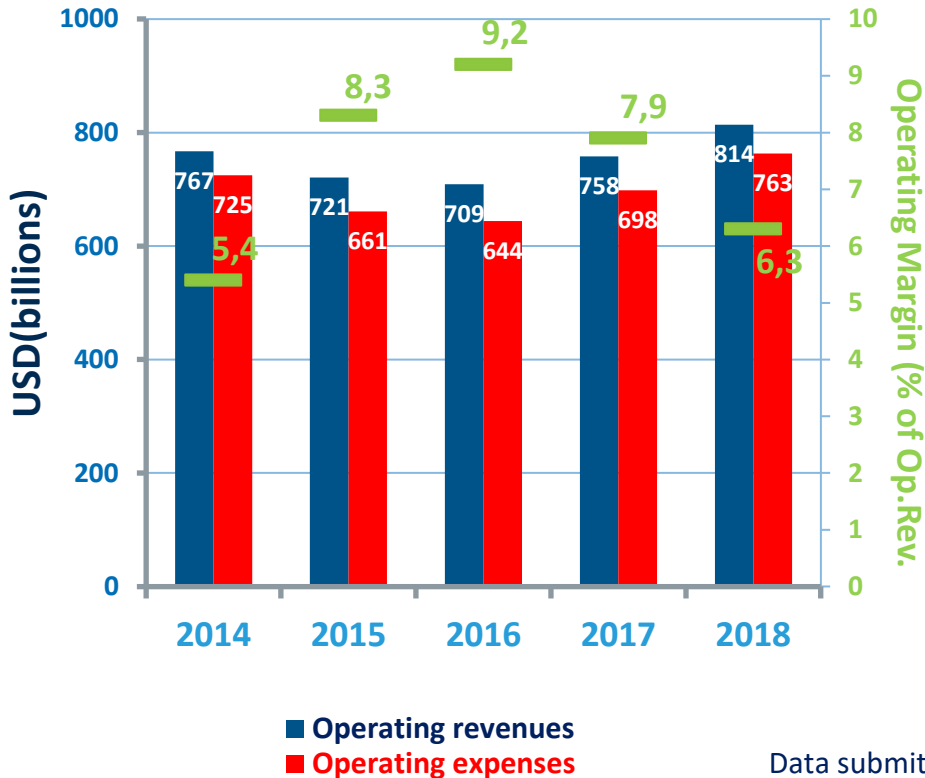


- **4.5 billion passengers**
- **38 million aircraft departures**
- **58 million freight tonnes carried**
- **Over 1 300 scheduled airlines**
- **More than 31 000 aircraft**
- **More than 3 700 airports**
- **170 air navigation centres**
- **360,000 pilots and 86,000 air traffic controllers**

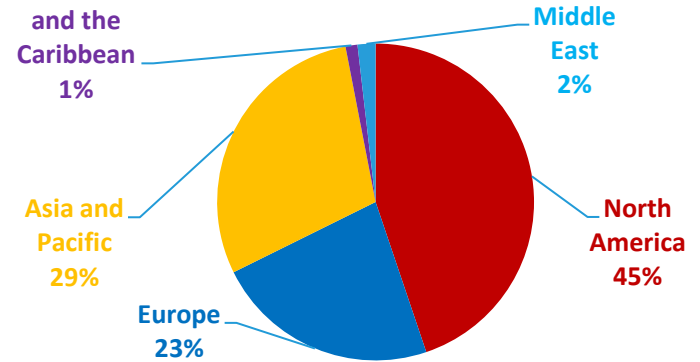
Share of total scheduled RPKs by region (2019)



Airlines financial results (2019)



Distribution of airlines net profit by region of registration



Mixed results at the regional level, with North American airlines concentrating 45% of the profits of the airline industry

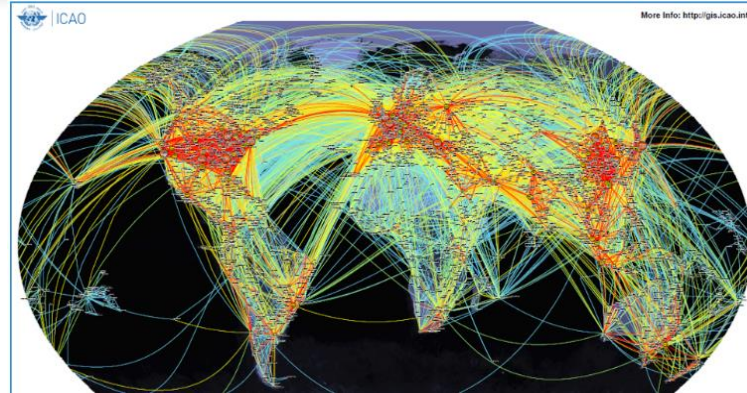
Data submitted by States in accordance with Article 67 of the Chicago Convention



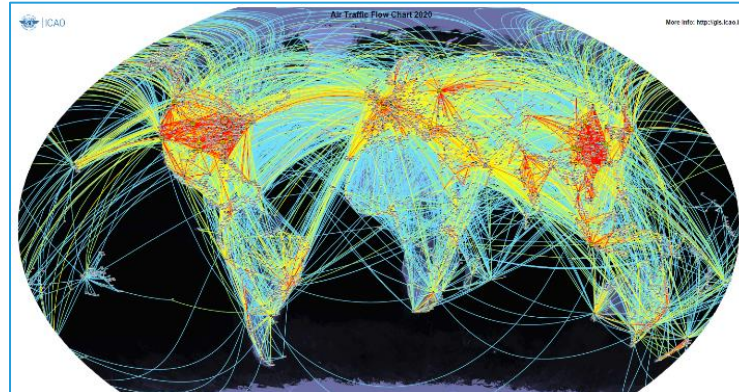
Economic Impact of COVID-19 Pandemic on Aviation

Pandemic Impact on Air Connectivity

Source:
ICAO GIS



2019

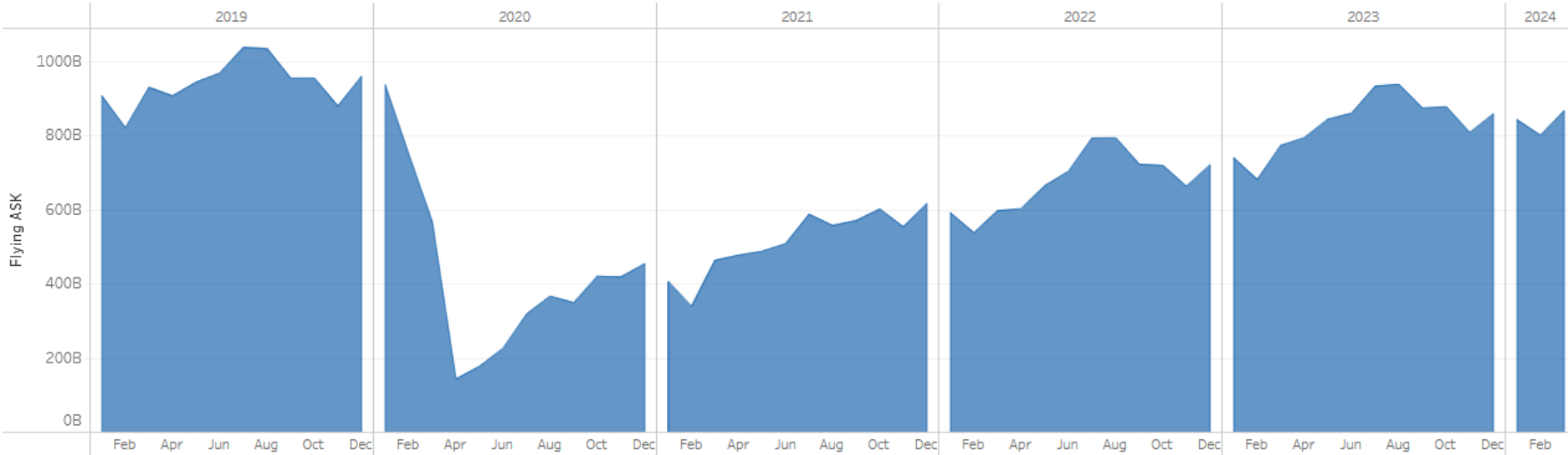


2020



World passenger traffic collapses with unprecedented decline in history

World passenger traffic evolution 1945 – 2023





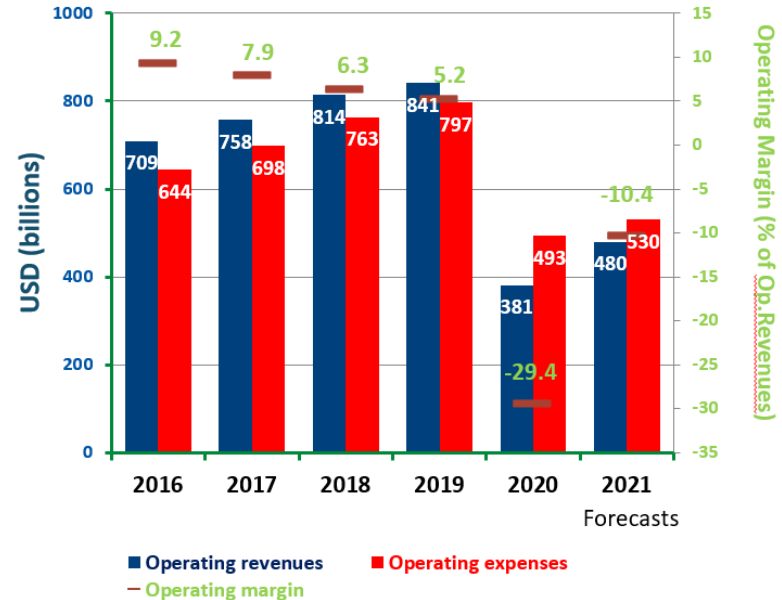
2020 vs. 2019:

- Overall reduction of **50% of seats offered by airlines**
- Overall reduction of **2.7 billion passengers (-60%)**
- Approx. **USD 372 billion loss** of gross passenger operating revenues of airlines

2021 vs. 2019:

- Overall reduction of **40% of seats offered by airlines**
- Overall reduction of **2.2 billion passengers (-49%)**
- Approx. **USD 324 billion loss** of gross passenger operating revenues of airlines

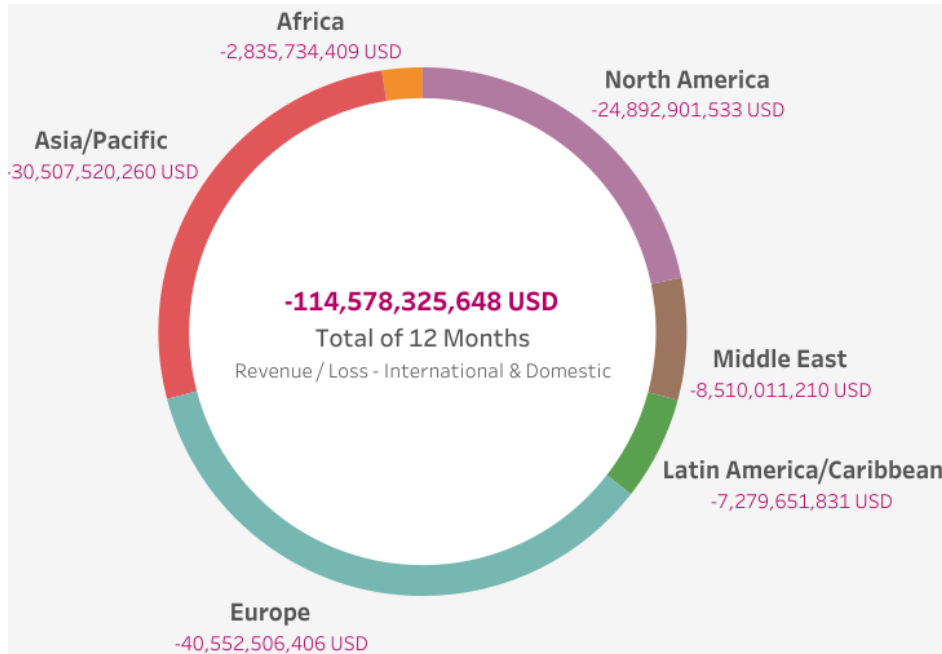
Unprecedented operating loss of USD 112 billion in 2020



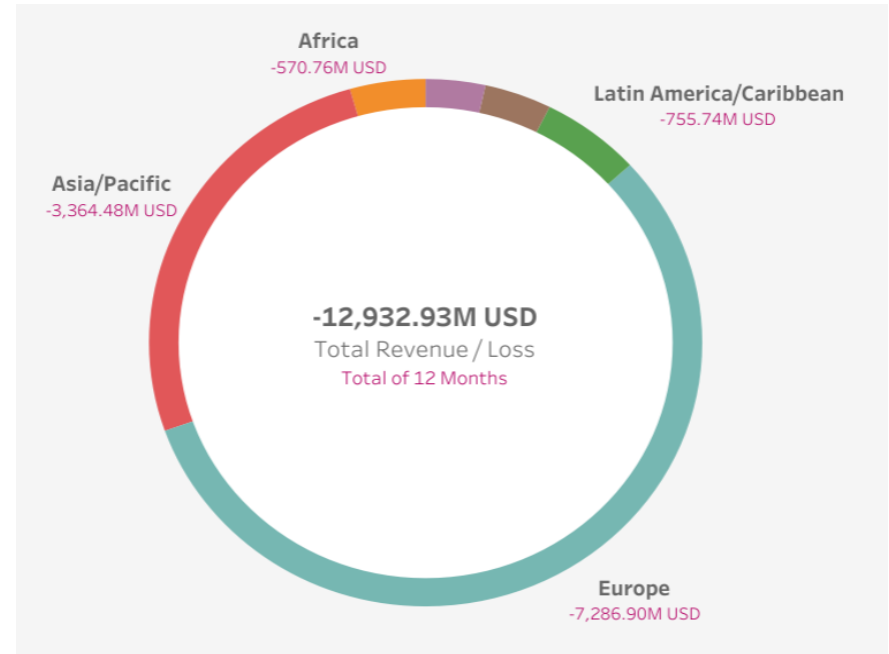


Airport and ANSP revenues were also severely impacted

Airport revenue loss in 2020



ANSP revenue loss in 2020



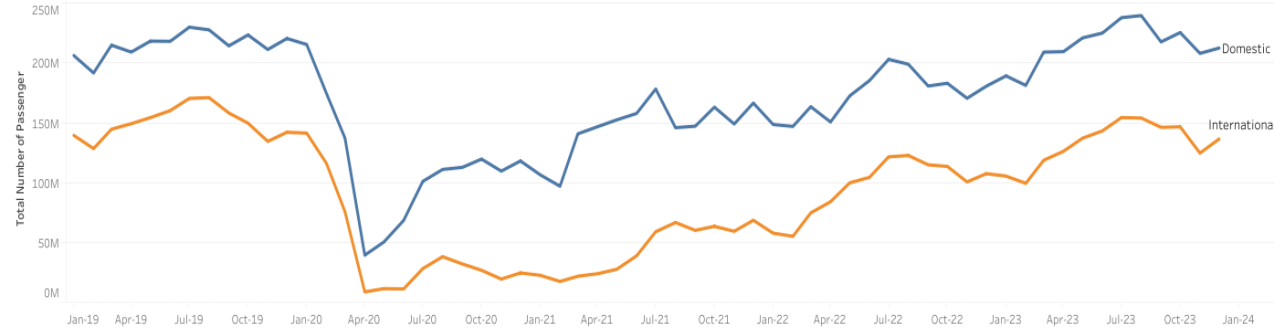


Recovery Overview



Global traffic recovering close to pre-pandemic levels

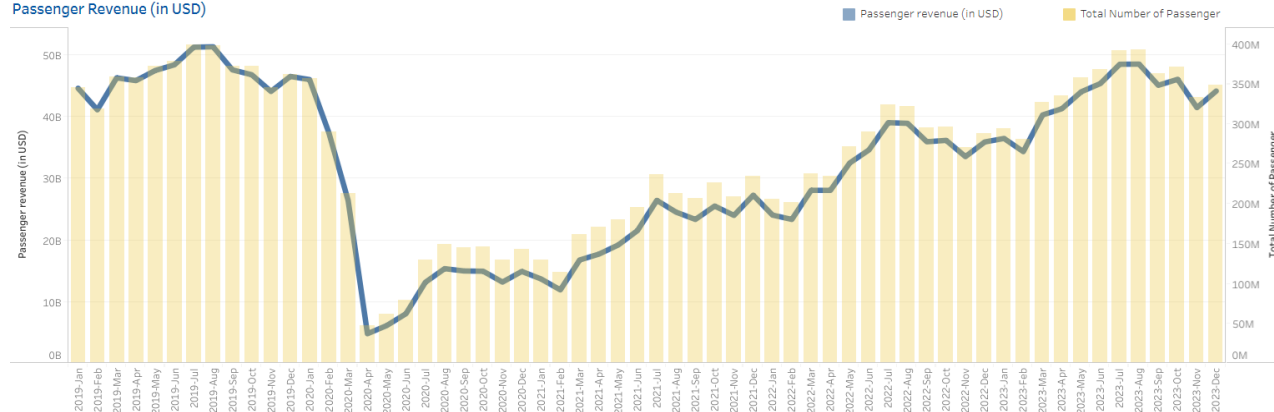
Overview of Passenger Evolution



Passenger traffic

ICAO's latest analyses reveal that air transport seat capacity and passenger totals globally have reached pre-pandemic levels in Q1 2024

Passenger Revenue (in USD)

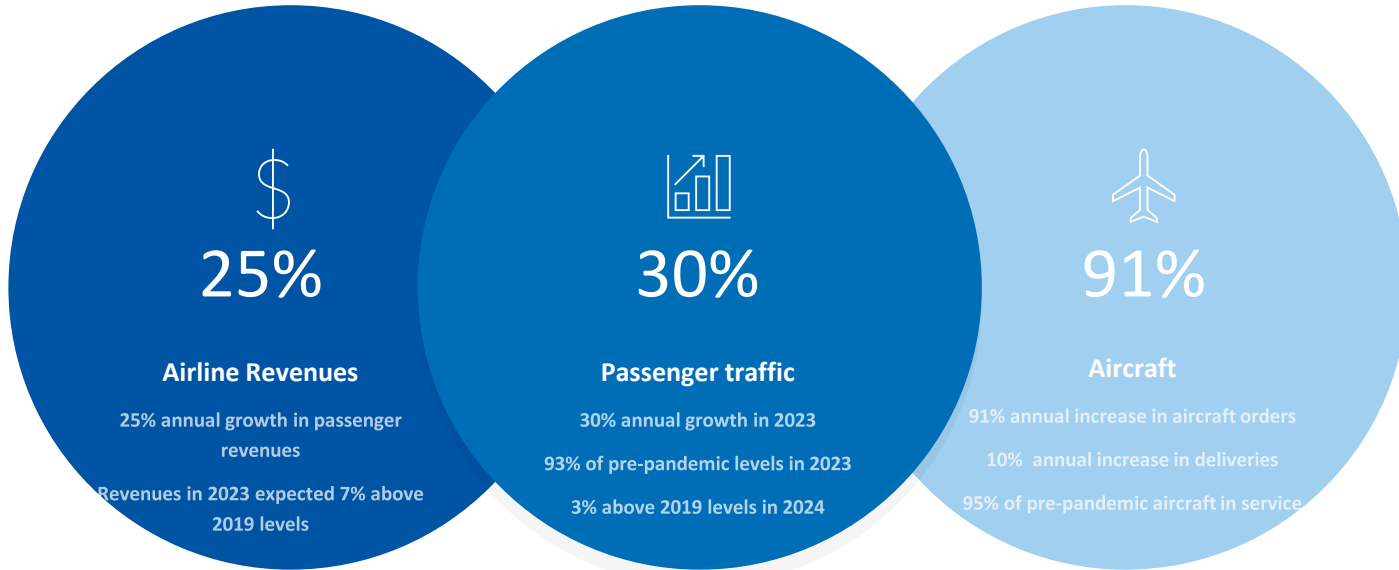


Passenger operating revenue

ICAO's latest analysis reveals that despite high fuel prices and economic uncertainties, airline total operating profits in 2023 are estimated at USD 516 billion, close to the 2019 levels

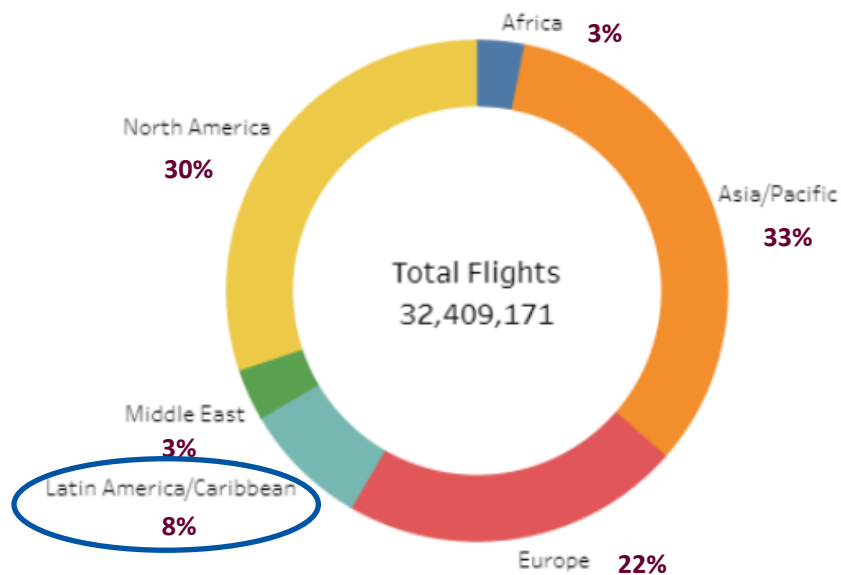


Global traffic in 2023: A recovery from the pandemic shock

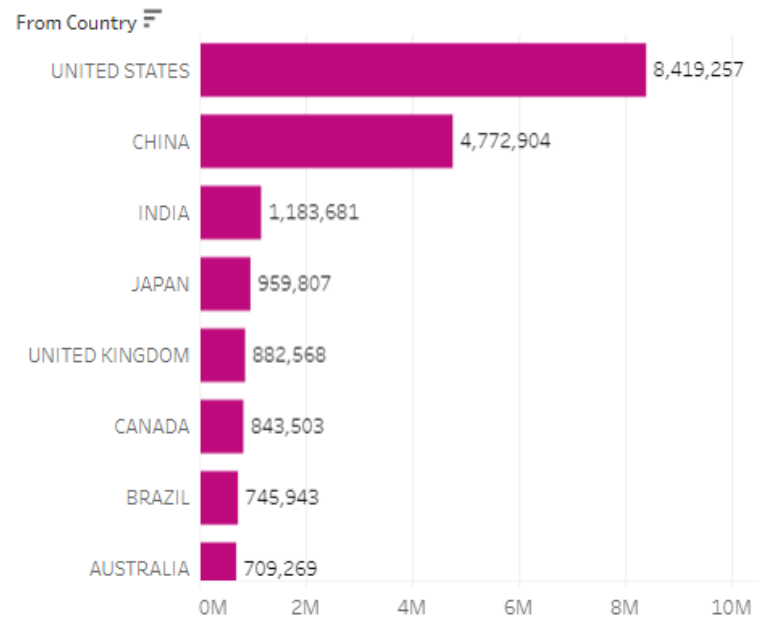




Number of flights by region (International and domestic, 2023)

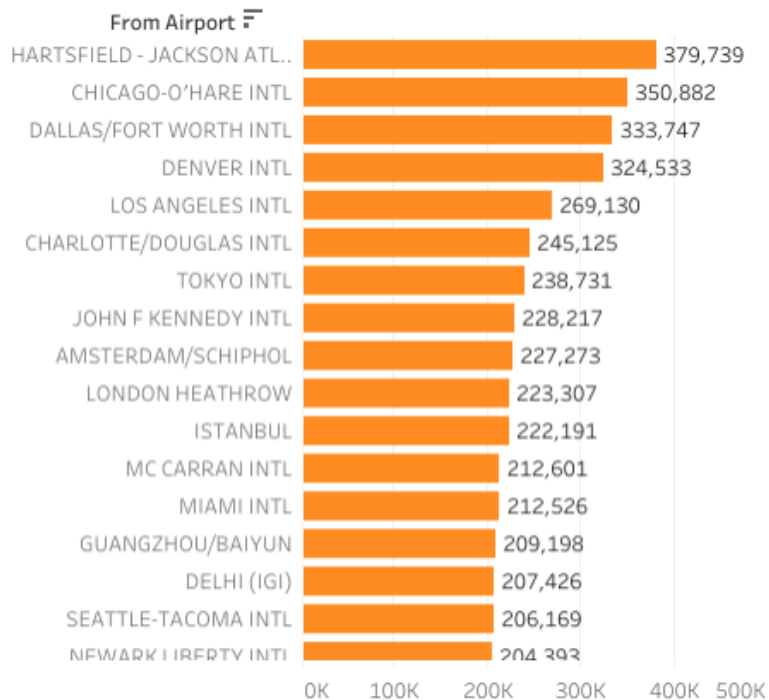


Number of flights by State (International and domestic, 2023)

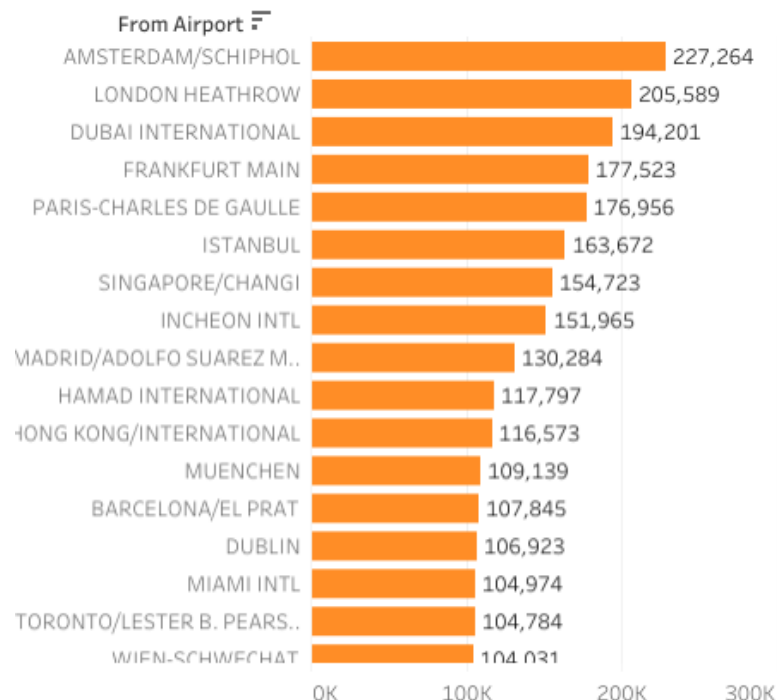




Number of flights by airports (International and domestic, 2023)

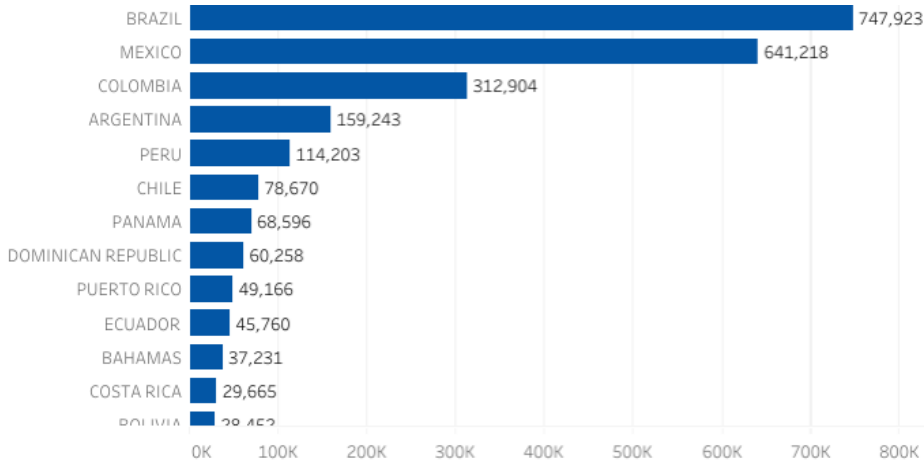


Number of flights by airports (International, 2023)

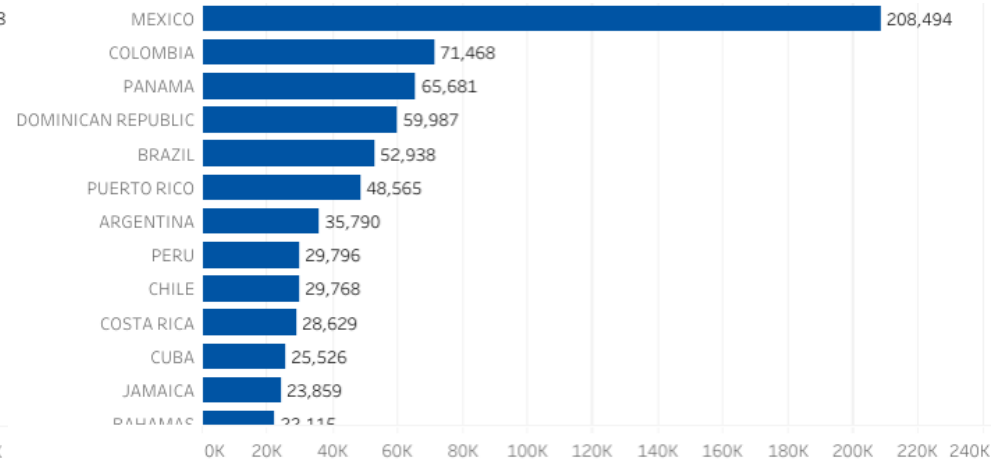




Number of flight by State
(International and domestic, 2023)

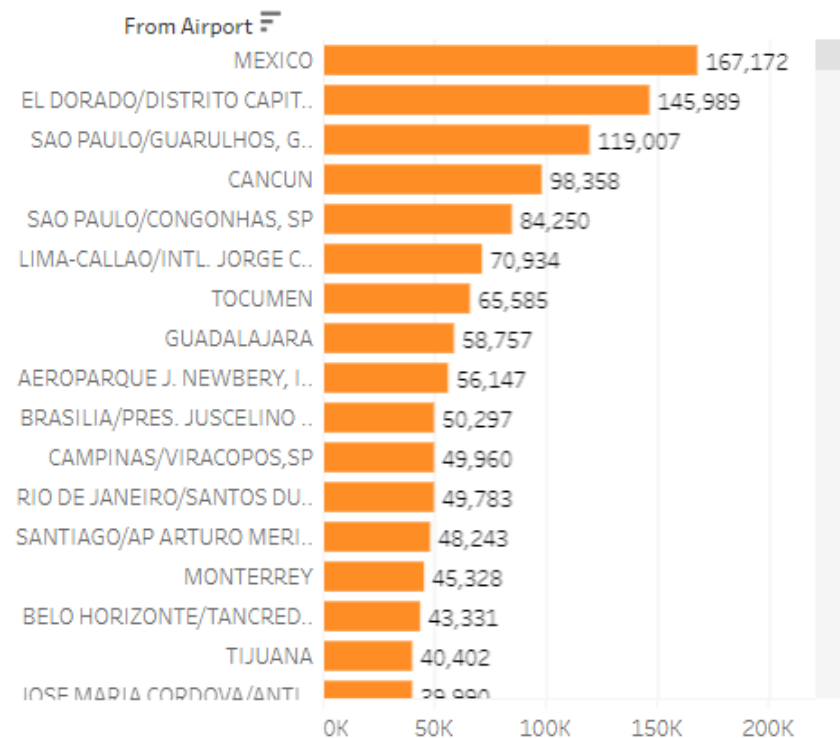


Number of flight by State
(International, 2023)

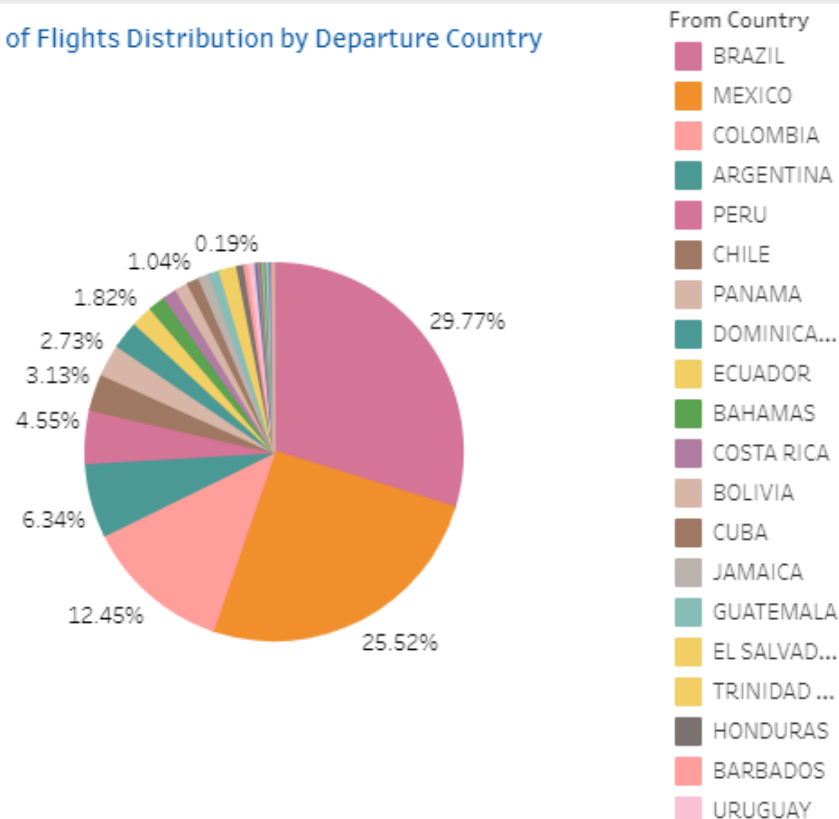




Number of Flights Ranking by Departure Airport

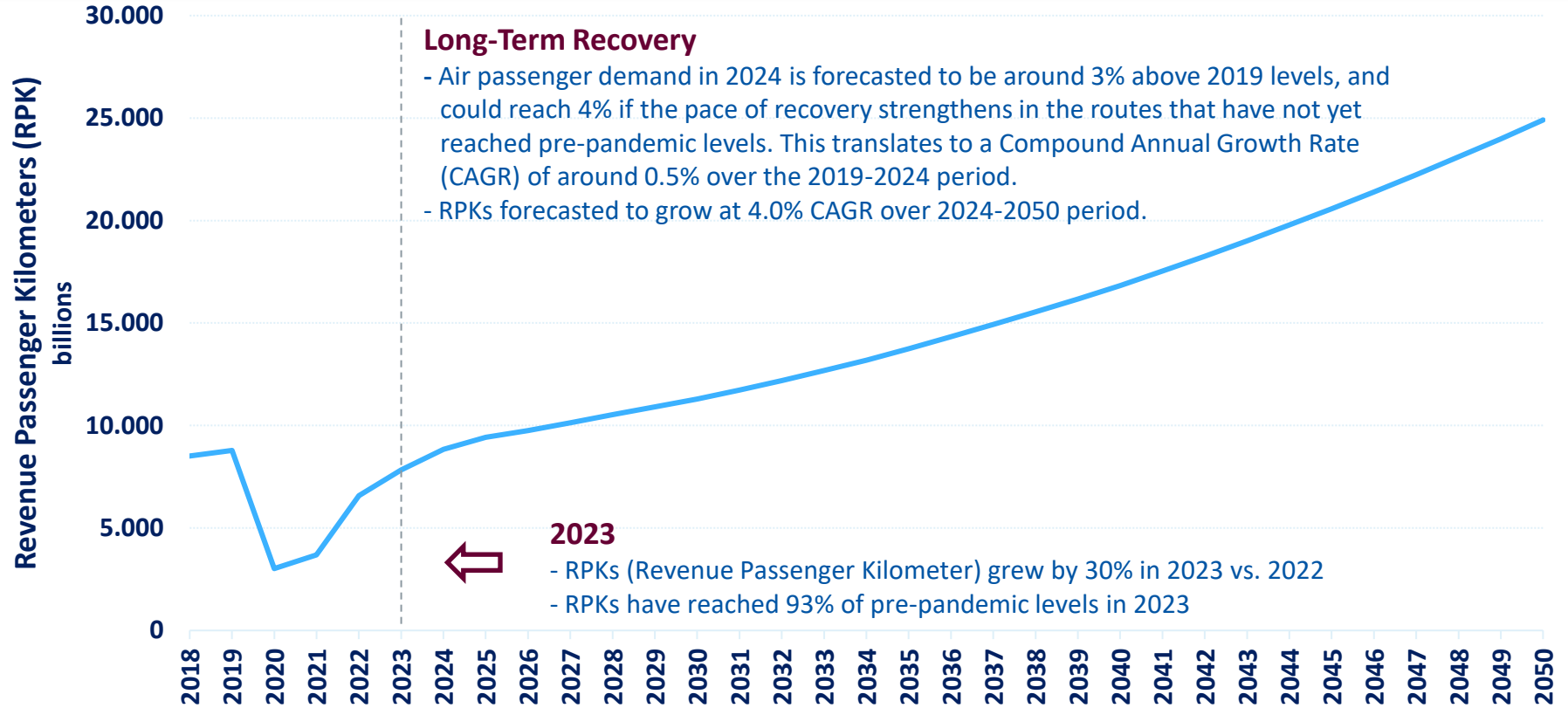


Number of Flights Distribution by Departure Country



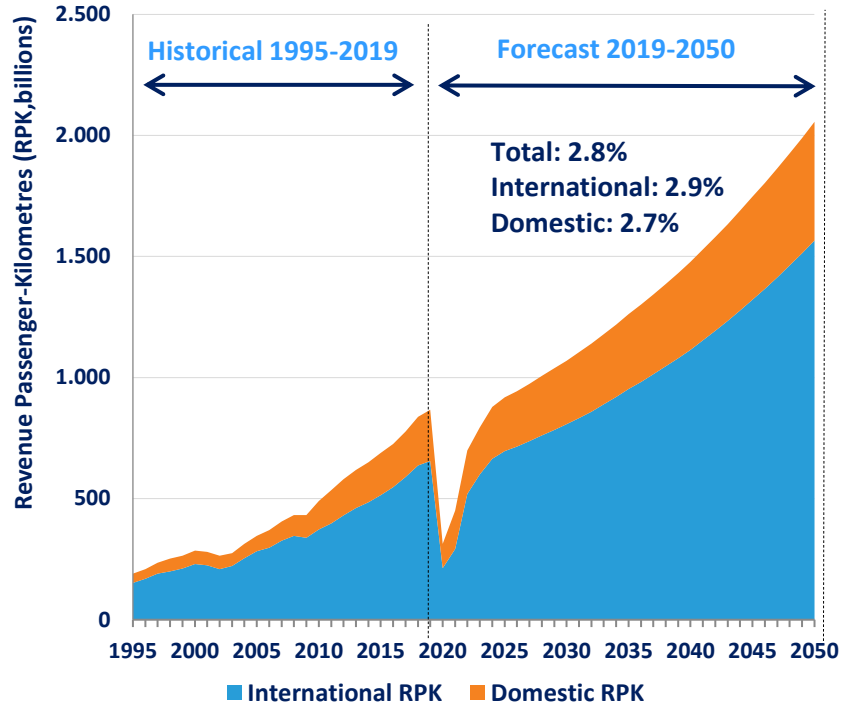


Long-term Traffic Forecasts





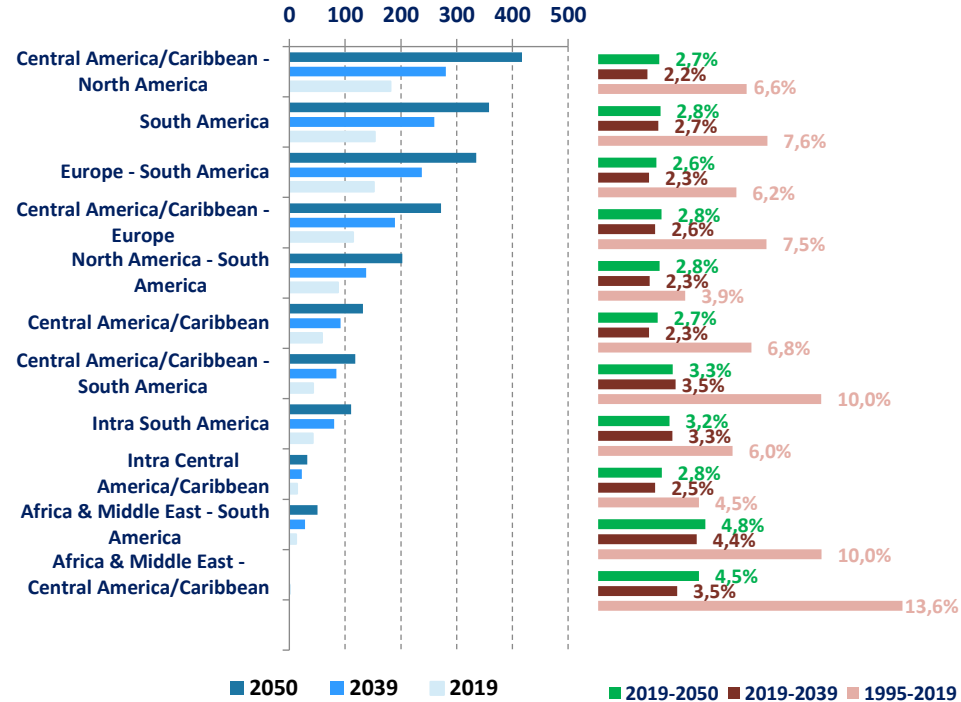
Long-term Passenger Forecasts: Latin America/Caribbean



Revenue Passenger-Kilometres (RPK)

(billion)

CAGR*

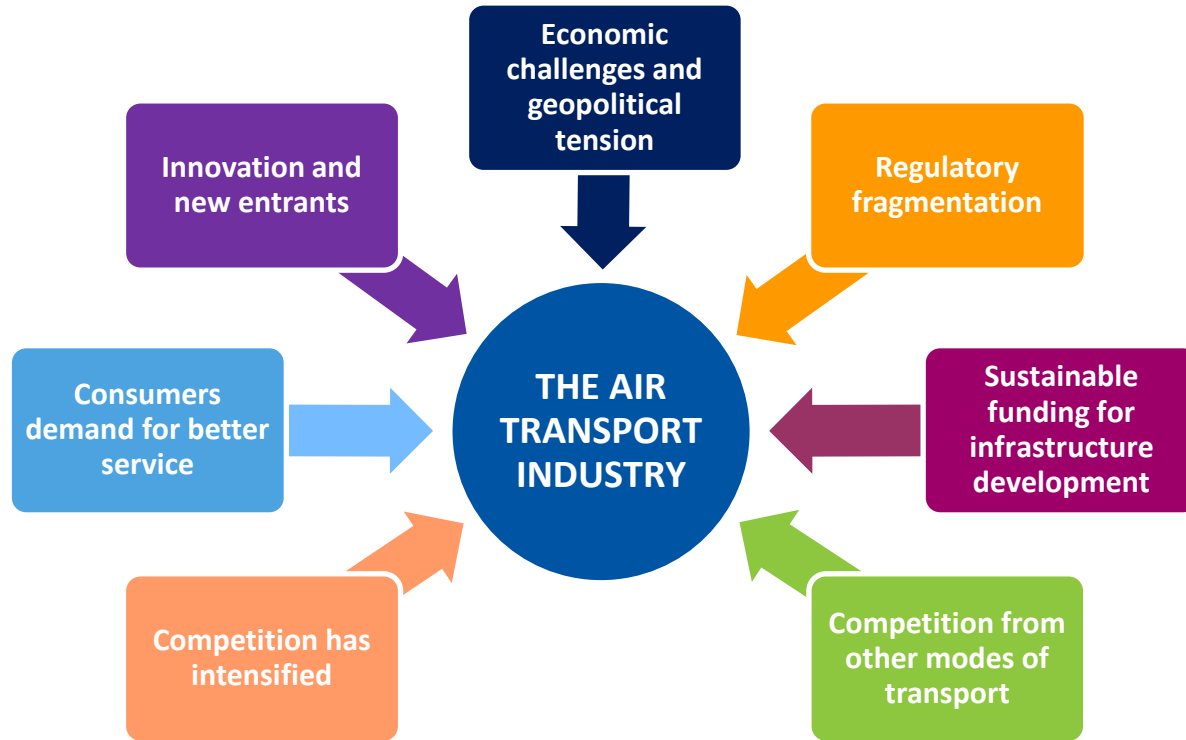




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Air Transport Development







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Paris

Asia and Pacific
(APAC) Sub-office
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Central African
(WACAF) Office
Dakar

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and Caribbean
(NACC) Office
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(SAM) Office
Lima

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Southern African
(ESAF) Office
Nairobi

Thank You!