

Doc 9915



Asia/Pacific Area Traffic Forecasts 2008–2025

**Report of the Fourteenth Meeting
of the Asia/Pacific Area Traffic
Forecasting Group (APA TFG)**

Bangkok, 22–29 September 2008

**Approved by the APA TFG and published
by authority of the Secretary General**

International Civil Aviation Organization

Published in English by the
INTERNATIONAL CIVIL AVIATION ORGANIZATION
999 University Street, Montréal, Quebec, Canada H3C 5H7

For ordering information and for a complete listing of sales agents
and booksellers, please go to the ICAO website at www.icao.int

ICAO Doc 9915, *Asia/Pacific Area Traffic Forecasts, 2008–2025*
Order Number: 9915-CD
ISBN [978-92-9231-228-2](https://www.isbn-international.org/number/978-92-9231-228-2)

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**REPORT OF THE
ASIA/PACIFIC AREA TRAFFIC FORECASTING GROUP
(APA TFG)
FOURTEENTH MEETING
BANGKOK, 22 TO 29 SEPTEMBER 2008**

Includes:

- Forecasts of Transpacific and Intra-Asia/Pacific Traffic to the Year 2025
- Forecasts for Major City-Pairs of Intra-Asia/Pacific and Transpacific to the Year 2012
- Analysis of FIR Data

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SUMMARY

1. The ICAO Pacific Area Traffic Forecasting Group was formed in 1991 with the primary objective of developing forecasts of civil aviation activity in the Transpacific market to support air navigation systems planning activity for ICAO and its Contracting States. The scope of the Group was subsequently broadened to include Intra-Asia/Pacific which is reflected in the current designation as Asia/Pacific Area Traffic Forecasting Group (APA TFG). The Group maintains close relationships with and provides essential data for regional meetings as well as groups charged with air navigation planning and implementation in North America (NA) and Asia/Pacific (AP). This report contains forecasts produced by the Group at its fourteenth meeting held on 22-29 September 2008 in the premises of the ICAO Regional Office in Bangkok.
2. During the period 1980 to 2007, Gross Domestic Product (GDP), measured in real terms, grew at average annual growth rates of about 3.5 per cent, 2.8 per cent and 4.7 per cent for the world, the North American and Asia/Pacific regions, respectively. In the aggregate, GDP in the Transpacific area grew at 3.7 per cent (Table 2).
3. The average revenue yield, measured in real terms, of the world's airlines total scheduled passenger traffic decreased at an average annual rate of 2.7 per cent during the same period. It is estimated that the Transpacific yields for the period declined at an average annual rate of about 2 per cent (Table 2).
4. During the same period, international passenger traffic in the Transpacific market increased from 6.4 million to 29.5 million passengers, at an average annual growth rate of 5.8 per cent (Table 1). The comparable world international passenger traffic increased by 6.2 per cent per year over the same period. However, the Transpacific traffic experienced a decline of some 10 per cent both in 2001 and 2003 and about 2.1 per cent in 2002. It rebounded in 2004 and increased by over 19 per cent and continued to grow by over 6 per cent in 2005. It continued to expand in 2006 and 2007 albeit at more modest growth rates (by some 1.1 and 3.3 per cent, respectively).
5. For the period 2007-2015, the GDP for the North American and Asia/Pacific regions is expected to increase at average annual rates of 2.5 per cent and 4.7 per cent, respectively, and for the period 2015-2025, at 2.4 per cent and 4.0 per cent per annum, respectively. In the aggregate, the most likely scenario (baseline) GDP average annual growth rate for the Transpacific area is projected at 3.5 per cent for the forecast horizon 2007-2025 (Table 3).
6. Average Transpacific airline passenger yield is expected to increase in real terms by 0.3 per cent per annum for the period 2007-2015 and to decline at about 0.5 per cent annually during the period 2015-2025 (Table 3). Average Intra-Asia/Pacific yield is expected to decline only marginally over the forecast horizon, at a rate similar to that for Transpacific yield.

7. Based on these "most likely" GDP and yield projections, Transpacific traffic is forecast to increase at an average annual rate of 5.6 per cent for the period 2007-2015, reaching some 45.7 million passengers in the year 2015. A growth rate of 5.6 per cent per annum is also expected for the period 2015-2025 resulting in a forecast of about 78.6 million passengers by the year 2025 (Table 4).

8. Consistent with the forecasts of passenger traffic growth, future expectations of load factors and average aircraft size (Table 5), total aircraft (including cargo) movements across the Pacific are expected to increase from an estimated 150 thousand in 2007 to 211 thousand in the year 2015, at an average annual growth rate of 4.4 per cent. For the whole period 2007-2025, these aircraft movements are expected to increase at an annual growth rate of 4.3 per cent, and reach 321 thousand aircraft movements by the year 2025 (Table 6).

9. Intra-Asia/Pacific passenger traffic is expected to increase at a "most likely" average annual rate of 5.8 per cent during 2007-2015, reaching some 174.1 million passengers in the year 2015. An average annual growth rate of 5.2 per cent is forecast for the period 2015-2025, resulting in almost 290 million passengers by the year 2025 (Table 9).

10. Intra-Asia passenger aircraft movements are forecast to increase from 950.3 thousand in 2007 to some 1 388 thousand in 2015, at an average annual growth rate of 4.8 per cent. For the period 2007 to 2025, aircraft movements are forecast to increase at an average annual growth rate of 4.4 per cent and reach some 2 078 thousand by 2025 (Table 11).

11. The selected top 45 city-pairs in terms of numbers of passengers in the Asia/Pacific and Transpacific are expected to show traffic increases in aggregate terms of passenger flow at an average annual growth rate of 4.5 per cent from 2007 to 2012. This growth will result in an increase in passenger traffic on the routes concerned from some 53.3 million passengers in 2007 to some 66.4 million passengers in the year 2012 (Table 12).