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**Nineteenth Meeting of the Middle East Air
Navigation Planning and
Implementation Regional Group
(MIDANPIRG/19)**

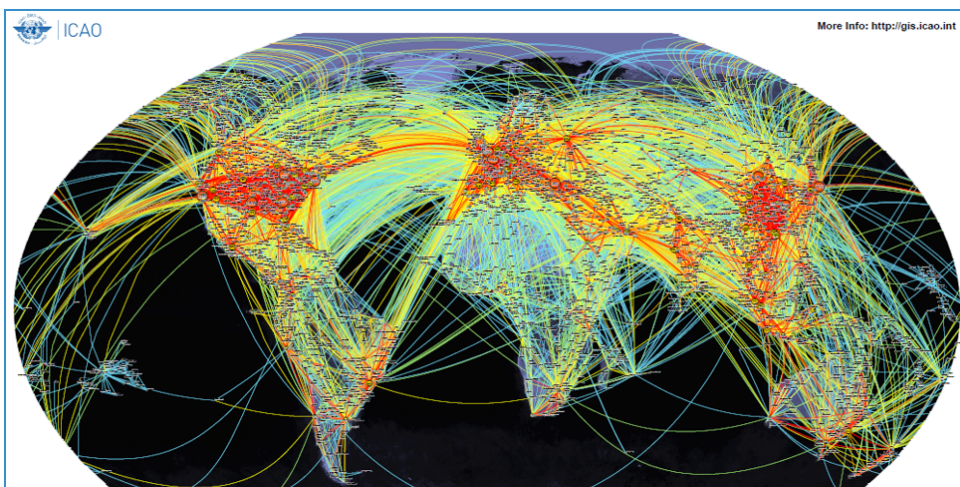
MID Region state of Air Transport

Riyadh, Saudi Arabia, 14-17 February 2022

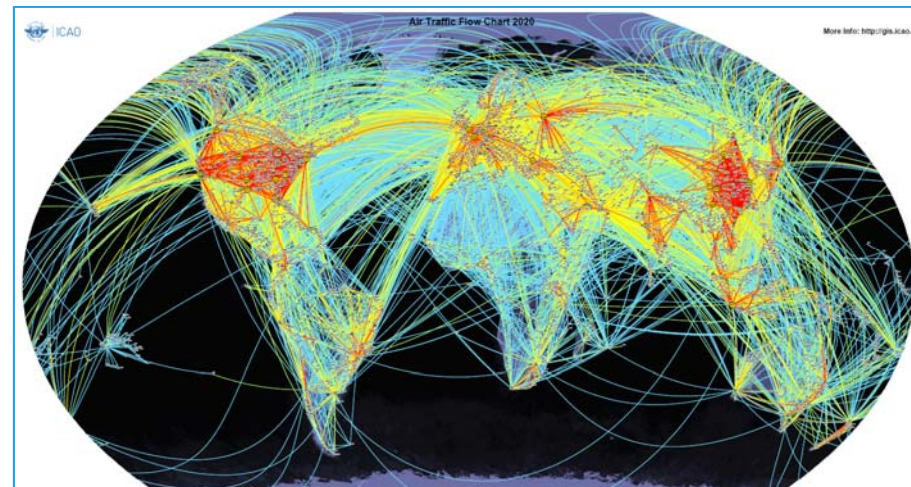




COVID-19 pandemic impacted air connectivity



2019



2020

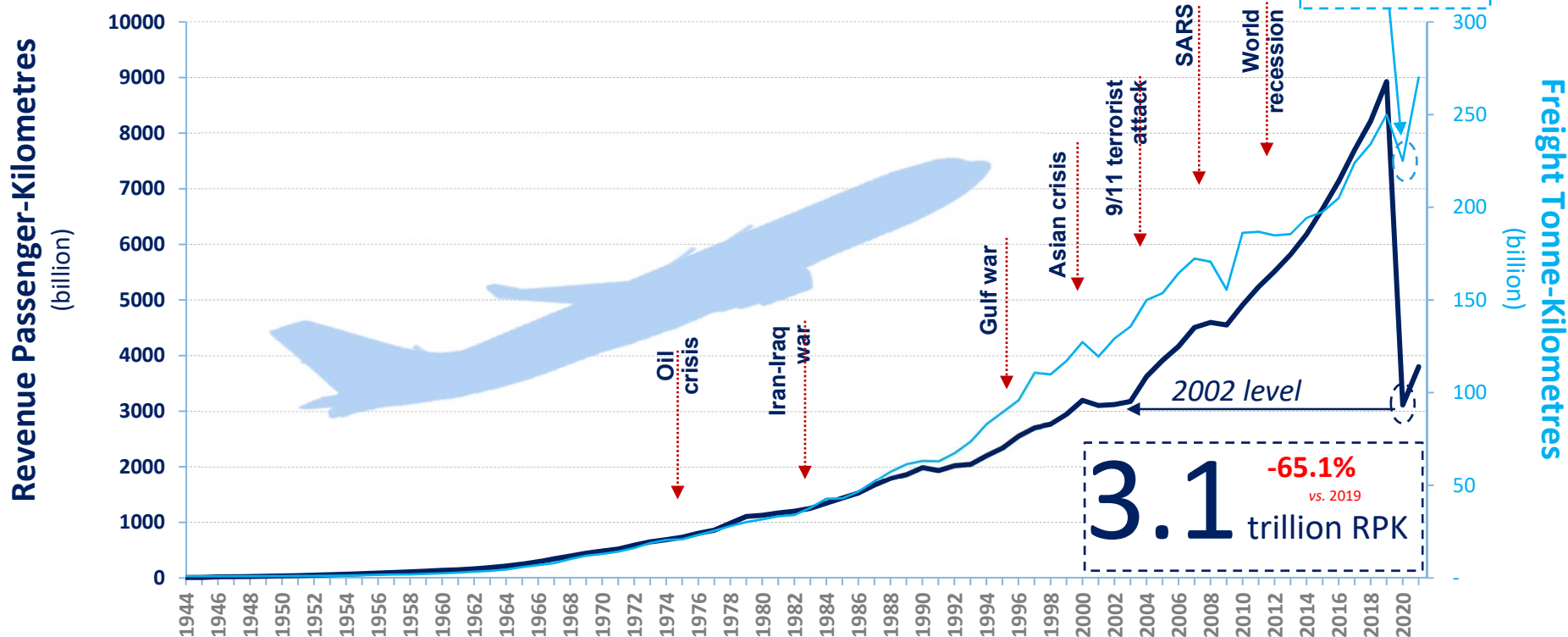


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Global traffic: A sharp traffic decline in 2020



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

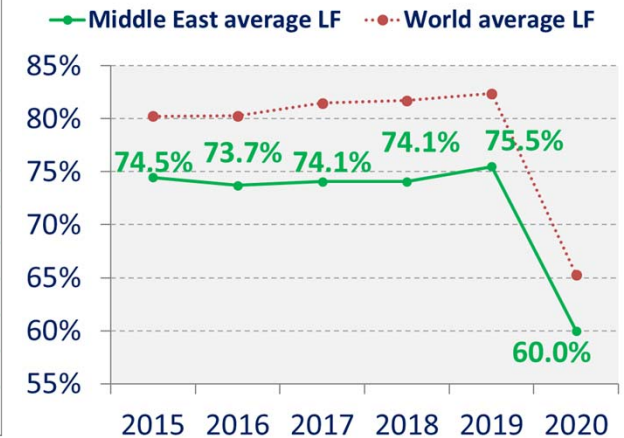
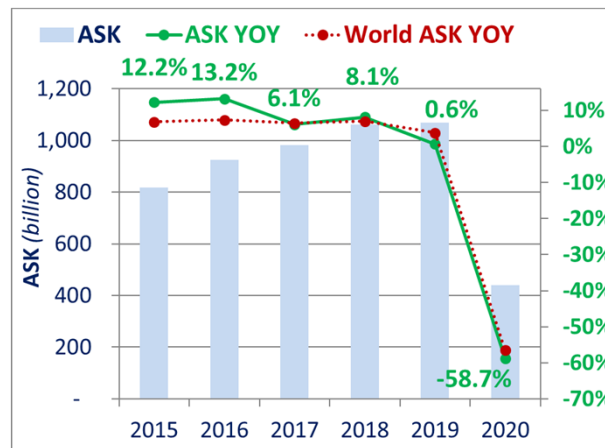
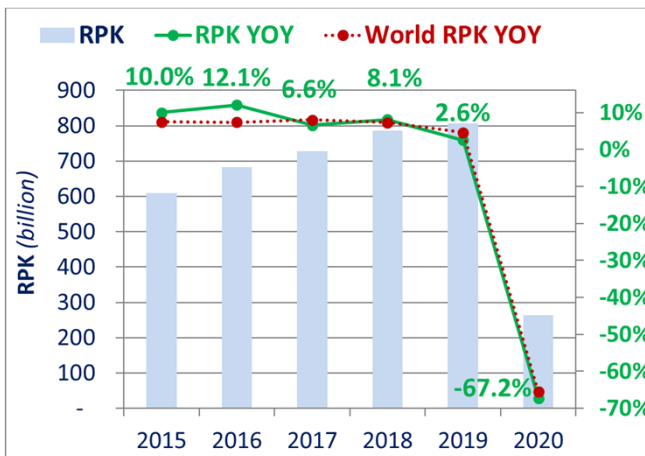


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MID passenger traffic



- Passenger traffic in Revenue Passenger-Kilometres declined by -67.2% in 2020
- Passenger traffic decline below the world average

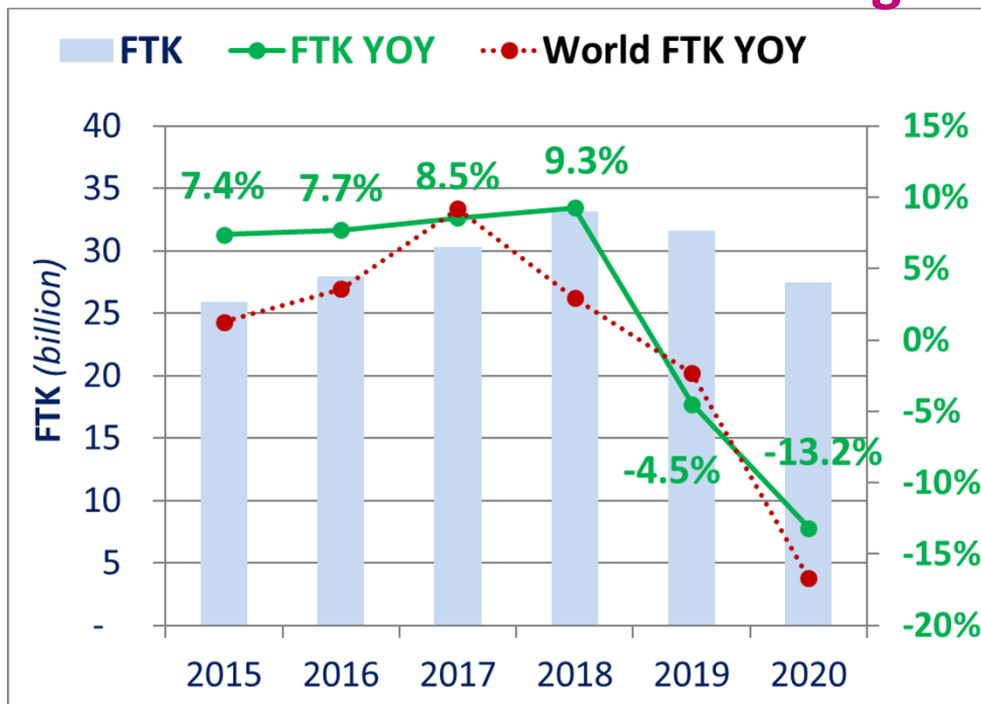
- Seat Capacity in Available Seat-Kilometres declined by -58.7% in 2020
- Capacity decline below the world average

- Passenger load factor declined to 60.0% in 2020, below the world average.
- Passenger load factor is below the world average

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



MID cargo traffic



- Cargo traffic measures in Freight Tonnes-Kilometres declined by -13.2% in 2020
- To be noted the FTK growth in Qatar and Iran
- FTK declined less than world average



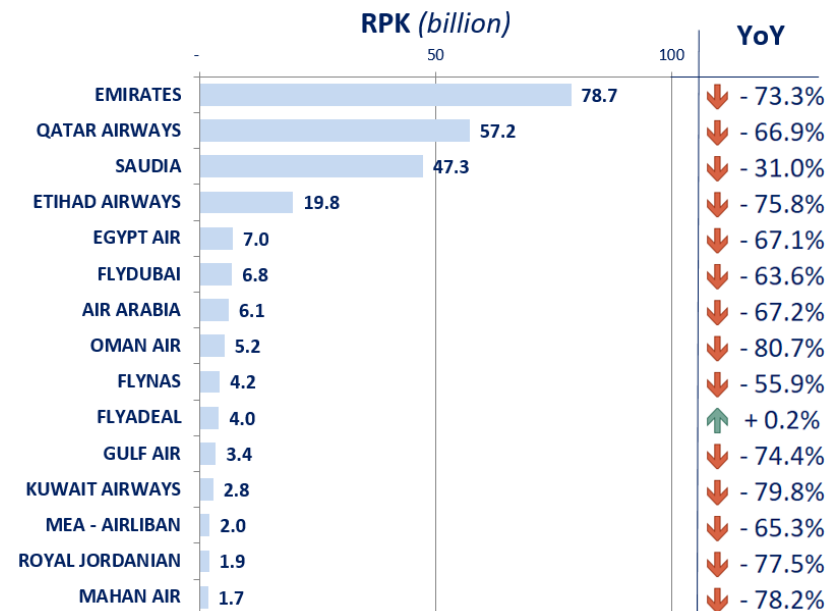
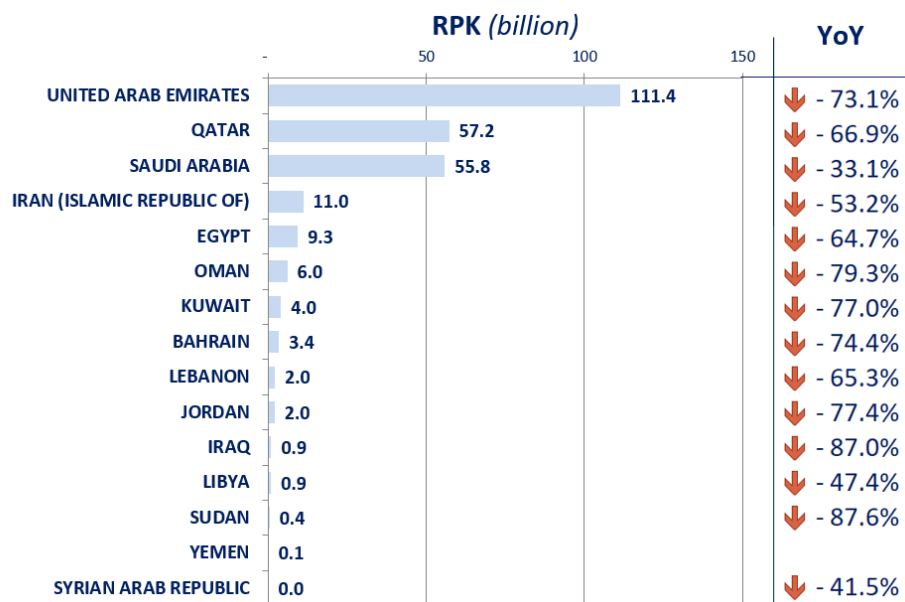
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State ranking by Revenue Passenger-Kilometres

Airline ranking by Revenue Passenger-Kilometres



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

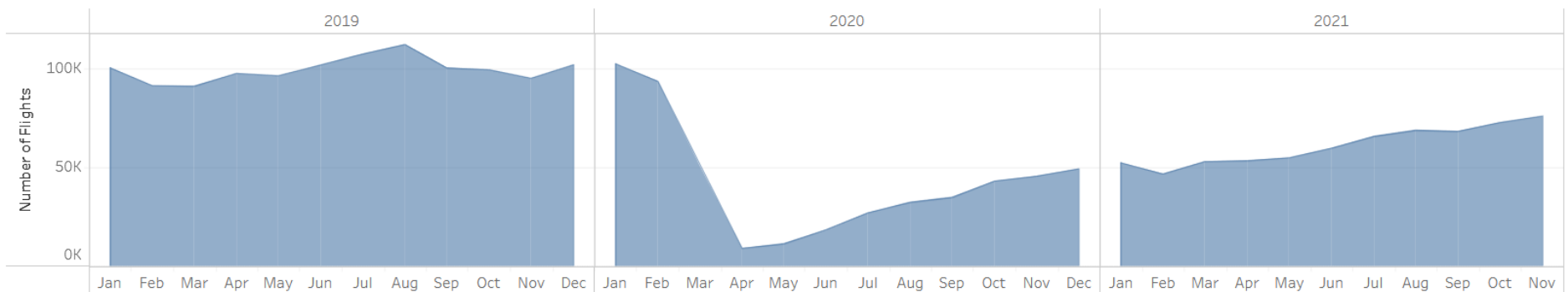


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Total Number of flights from MID States 2019-2020-2021



- **Recovery status of flights is underway, and already above 2019 levels for cargo flights:**
- Total number of flights in November 2021 reached 80% of November 2019 level
- Number of cargo flights in November 2021 is 14% higher than November 2019

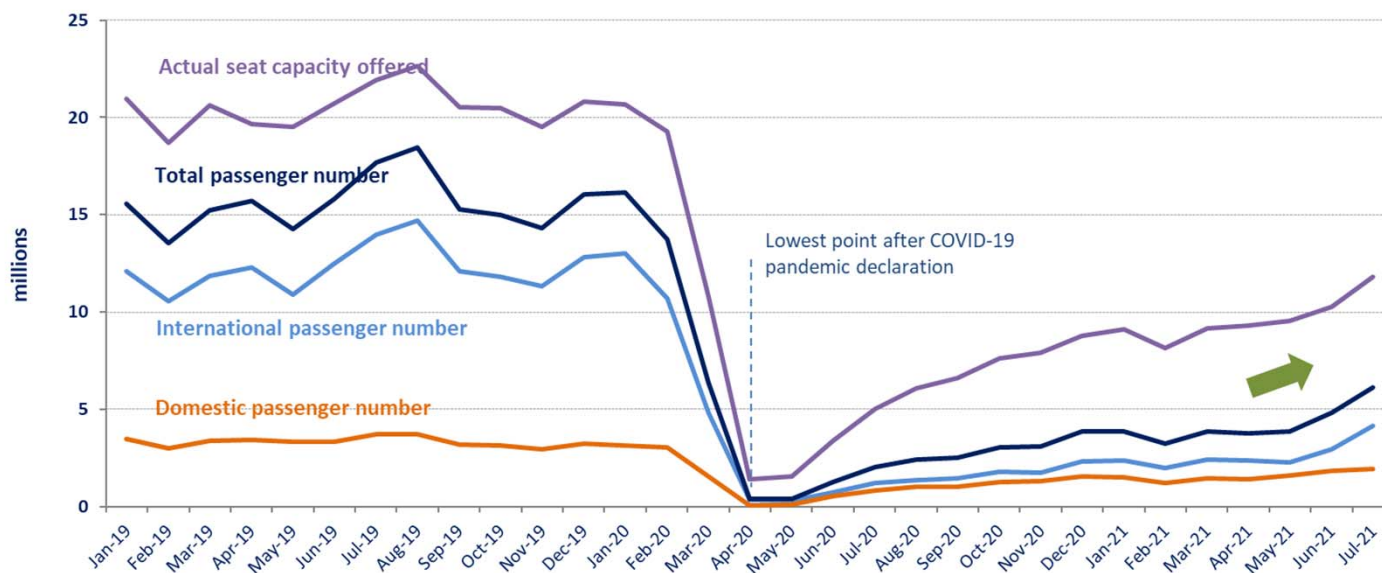
- **Revenue loss in the Middle East Region by sector in 2020:**
- Airlines: USD 28 billion
- Airports: USD 8.5 billion
- ANSP: USD 500 million

Source: ICAO Big Data



Significant decline in traffic with marginal improvements

Evolution of traffic – Middle East

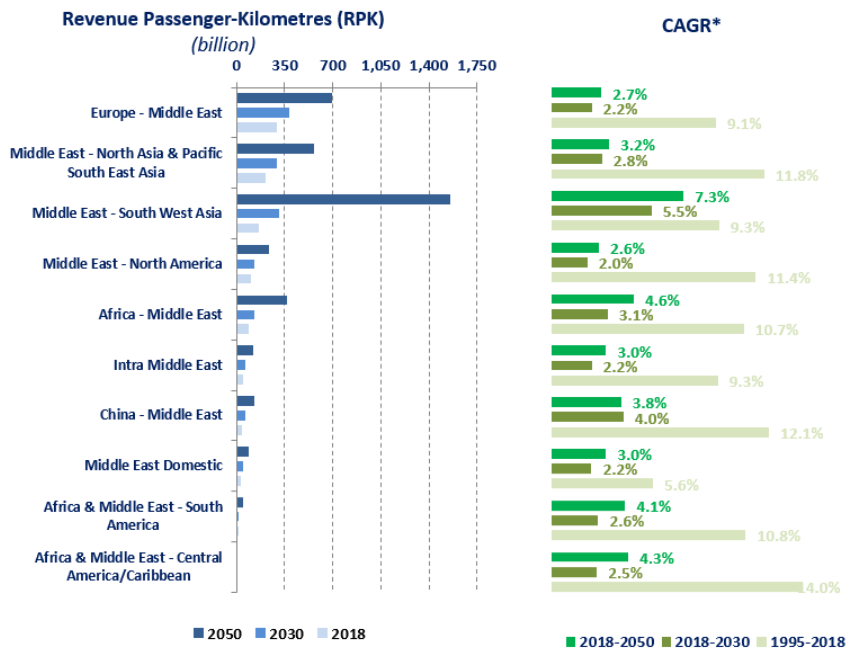


- Passengers numbers in April 2020 fell 97%.
- Over 70% decline in passenger numbers from 187 million in 2019 to 55 million in 2020.
- International passengers declined by 73%.

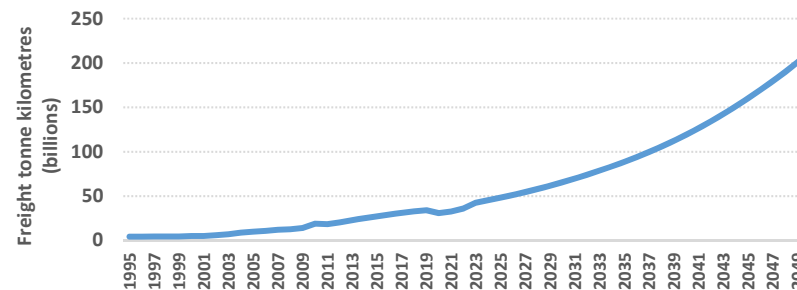


Long term traffic forecasts - Middle East (2018 baseline)

Passenger Traffic by route group to/from Middle East



Cargo forecasts – Middle East



- Passenger traffic (RPK) CAGR 2018-2050 forecast is 4.4%, 3.0% and 4.3% for international, domestic and total, respectively
- Cargo traffic (FTK) CAGR 2018-2050 forecast is 6.0%, 2.3% and 6.0% for international, domestic and total, respectively

*CAGR : Compound Annual Growth Rate



Economic Impact Analysis of COVID-19:

<https://www.icao.int/sustainability/Pages/Economic-Impacts-of-COVID-19.aspx>



COVID-19 Air Traffic Dashboards:

<https://www.icao.int/sustainability/Pages/COVID-19-Air-Traffic-Dashboard.aspx>





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