



*International Civil Aviation Organization*

**Middle East Air Navigation Planning and  
Implementation Regional Group**

**Sixteenth Meeting (MIDANPIRG/16)  
(Kuwait, 13 – 16 February 2017)**

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**Agenda Item 5.1: Air Navigation Strategy and Planning**

**MID REGION AVIATION STATISTICS AND FORECASTS**

*(Presented by the Secretariat)*

**SUMMARY**

This paper presents the MID Region Aviation Statistics and Forecasts to support regional air navigation planning and implementation processes.

Action by the meeting is at paragraph 5.

**REFERENCES**

- MIDANPIRG/15 Report
- MSG/5 Report

**1. INTRODUCTION**

1.1 The development of forecasts for major traffic flows from, to and within the MID Region that also includes Peak Period analysis and other planning analyses is necessary to support regional air navigation planning and implementation processes.

**2. STATE OF AIR TRANSPORT IN THE MID REGION**

2.1 Air carriers of the MID Region (the 15 Member States to which the MID Office is accredited) recorded the highest annual growth of of **10.2 per cent** in terms of Revenue Passenger-Kilometers (RPK) on total (i.e. domestic and international services combined) scheduled services in 2015, compared to 11.2 per cent growth in 2014. This robust growth was supported by the expansion of air carriers such as Emirates (+8.8%), Qatar Airways (+18.0%), Etihad Airways (+21.3%) and Oman Air (+29.7%), as well as the Low Cost Carriers (LCCs) Air Arabia (+8.9%) and flydubai (+30.0%). Those air carriers expanded their network and benefited from their excellent geographical position to link different cities with only one stop in their respective hubs. However, the growth was not homogeneous in the region as for instance Saudia Airlines, Egypt Air and Royal Jordanian showed a decrease of -4.4%, -3.0% and -10.5%, respectively. Airlines of the United Arab Emirates, Qatar and Saudi Arabia account for 85.3 per cent of the total passenger traffic of airlines of the MID Region.

2.2 With its combined economic strength and airline network expansion, International traffic on scheduled services of air carriers in the MID Region, which represents 95.3 per cent of the Region's total RPK, recorded **10.7 per cent** annual growth in 2015.

2.3 The airlines of the MID Region showed a stable growth in 2015 and in 2014 in terms of aircraft departures. The total number of scheduled commercial departures in 2015 grew at a pace of **4.8** per cent to reach about **1.32 million departures**, compared to a growth rate of 4.4 per cent recorded in 2014.

2.4 Seating capacity offered by the MID Region airlines in 2015 increased by **12.5 per cent** in the Middle East (9.9% growth compared to 2014). The average passenger load factor lost decreased in 2015. It reached **75.7%** compared to 77.3% in 2014. However, it is still below the world average (80.4%).

2.5 The States with a consequent domestic market are Saudi Arabia and the Islamic Republic of Iran. The domestic market of Saudi Arabia recorded a decrease of -3.0 per cent and the domestic market of the Islamic Republic of Iran increased by 2.2 per cent.

2.6 Cargo traffic performed by MID carriers recorded the highest annual growth of **11.9** per cent in 2015 in terms of freight tonne-kilometers (FTK), compared to 11.2 per cent in 2014. Air freight markets performed by MID carriers are almost exclusively international and the United Arab Emirates and Qatar, both accounting for 87.5 per cent of the total freight traffic, recorded annual growths of 7.2 per cent and 26.2 per cent, respectively, on total scheduled services.

### 3. TRAFFIC FORECASTS

3.1 According to the ICAO forecasts, the passenger traffic to, from and within the MID Region on the five major route groups concerned for the period **2012-2042** is expected to increase at an average annual rate of **5.2** per cent. In 2042, the **Middle East-Central South West Asia** Route Group is expected to become the largest traffic route group to/from Middle East with an average annual growth rate of **8.2 per cent** per annum, followed by Europe-Middle East, North Asia and Pacific South East Asia-Middle East, Africa-Middle East and North America-Middle East Route Groups with growth rates of **2.9** per cent, **3.5** per cent, **4.7** per cent and **3.4** per cent, respectively, for the period concerned.

### 4. ICAO AVIATION DATA ANALYSES SEMINAR

4.1 MIDANPIRG/15 was apprised of the outcome of the ICAO Aviation Data Analyses Seminar held in Cairo, Egypt, 27 – 29 October 2014. The main objectives of the Seminar were to focus on ways and means to improve the quality and quantity of statistics data sent to ICAO and the Civil Aviation Authorities, taking into consideration the Recommendations of the Tenth Session of the Statistics Division (STA/10) and the results of the First Meeting of the Aviation Data and Analyses Panel (ADAP/1). It was noted that as part of the Recommendations of the Seminar, States and ICAO were requested to continue to cooperate closely to overcome the difficulties related to the low level of reporting statistics data to ICAO in order to improve the coverage and quality of reporting on ICAO Air Transport Reporting Forms. The meeting supported the outcome of the MSG/4 and DGCA-MID/3 meetings regarding the need for another Seminar to be organized by ICAO in 2016 to further enhance the technical knowledge of States and address other subjects of relevance, which due to time constraints, have not been addressed in detail during the Seminar of 2014. Accordingly, the meeting agreed to the following Conclusion:

*CONCLUSION 15/9: AVIATION STATISTICS AND TRAFFIC FORECASTS*

*That,*

- a) States be urged to:*
  - i. nominate to ICAO Focal Points for aviation statistics;*
  - ii. provide the statistics required by ICAO in a timely manner and to the extent possible in an electronic format*
- b) ICAO organise a Second Aviation Data Analyses Seminar in 2016 to keep the momentum and further enhance the technical knowledge of States.*

4.2 As a follow-up action to the above Conclusion, State Letter Ref.: AT 5/3 – 16/120 was issued on 7 April 2016 urging States to provide the ICAO MID Office by 20 April 2016 with the contact details of their focal point for Aviation Statistics, as well as with the required statistics in an electronic format. Only Kuwait and Lebanon replied to the State Letter and provided the contact details of their focal point. Statistics were not received by the ICAO MID Office from any State.

4.3 The meeting may wish to note that the Second Aviation Data and Analysis Seminar is scheduled to be held in Tehran, Iran, 20-23 February 2017. The objective of the Seminar is to bring together all stakeholders, (Regulators, Air Navigation Service Providers (ANSPs), Aerodrome Operators, Aircraft Operators, International Organizations and Industry) to review the current situation and trends of aviation in the MID Region, including the synergies between aviation, tourism and trade; and the understanding of the challenges and needs of the different stakeholders, considering the cost effectiveness. The use of civil aviation data analysis for planning and decision making in ICAO, national administrations, airlines, airports and ANSPs will be also addressed. The Seminar will include also a number of discussion panels addressing interesting subjects such as: information systems to improve airline efficiency, economics of airports and ANSPs.

4.4 States and all Organizations are encouraged to participate actively in the Seminar.

## **5. ACTION BY THE MEETING**

5.1 The meeting is invited to:

- a) take into consideration the MID Region Aviation Statistics and Forecasts in the regional air navigation planning and implementation processes;
- b) urge States to implement the provisions of MIDANPIRG Conclusion 15/9 a);
- c) encourage States and stakeholders to attend and support the Aviation Data and Analysis Seminar (Tehran, Iran, 20-23 February 2017).