

ICAO GLOBAL AVIATION COOPERATION SYMPOSIUM

ANGELA GITTENS

2 OCTOBER 2014

DIRECTOR GENERAL

MONTREAL, CANADA

ACI WORLD



ICAO GLOBAL AVIATION COOPERATION SYMPOSIUM

2 OCTOBER 2014

MONTREAL, CANADA

ANGELA GITTENS

DIRECTOR GENERAL

ACI WORLD

- **CHALLENGE: SUSTAINABILITY**
- **OPPORTUNITY: EMERGING MARKETS**
- **HOW ACI HELPS**



Global indicators and analyses for over 680 airports, representing 70% of the world's passenger traffic

The background of the report cover is a blue-tinted image. The top portion shows a close-up of an airport terminal's roof structure with various architectural details and a date stamp '2013-08-22'. Below this, a dark blue rounded rectangle contains the title '2013 ACI Airport Economics Report' in white text. The bottom portion of the image shows a perspective view of an airport runway or taxiway stretching into the distance under a clear sky.

2013 ACI Airport Economics Report

Relevant statistics. Superior decision-making. Better airports.

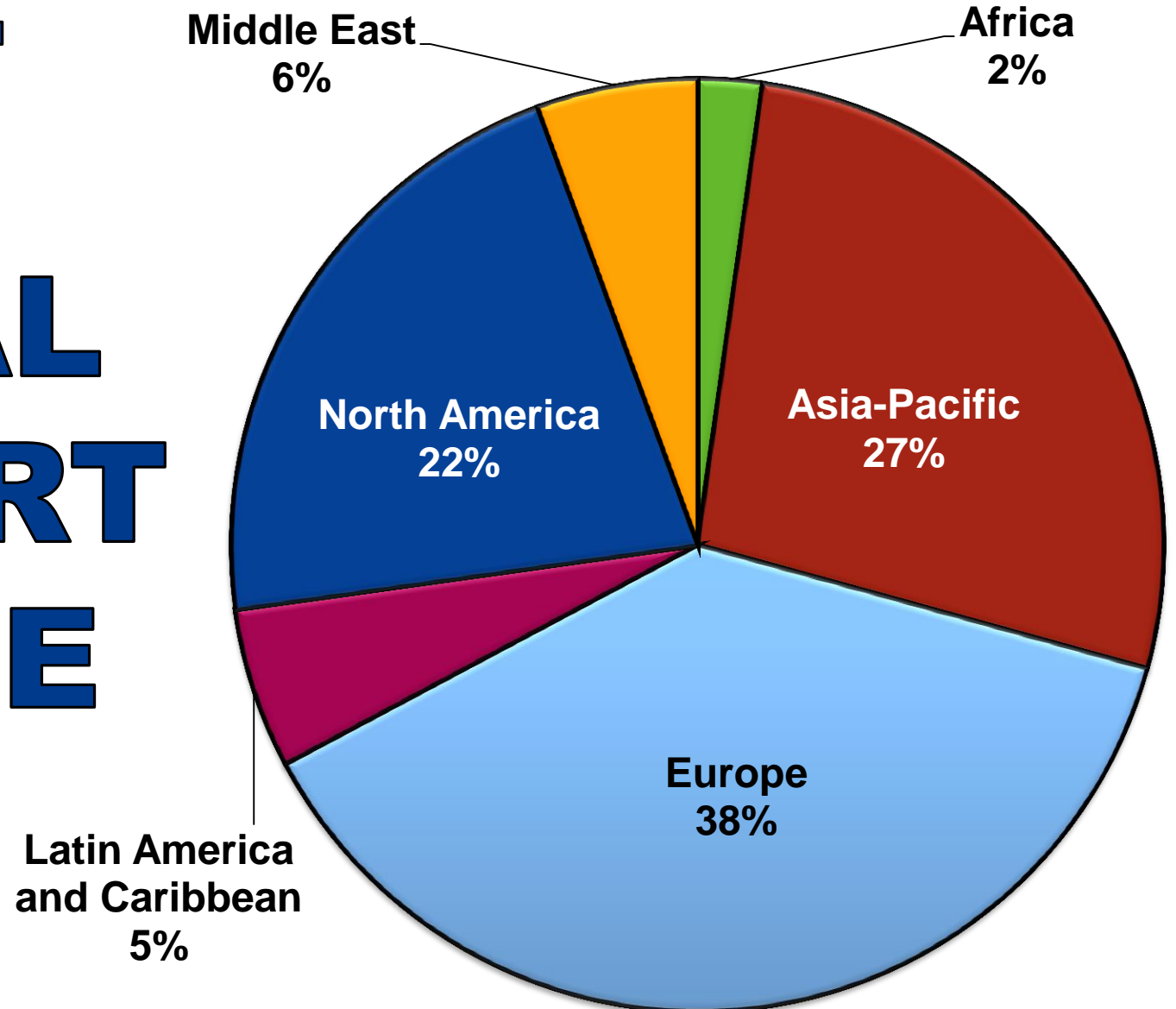
A COMPREHENSIVE VIEW OF THE INDUSTRY'S 2012/2013 FINANCIAL PERFORMANCE

683 airports

**3.99 billion
passengers**

**70% of
worldwide
passenger
traffic**

SHARE OF GLOBAL AIRPORT INCOME



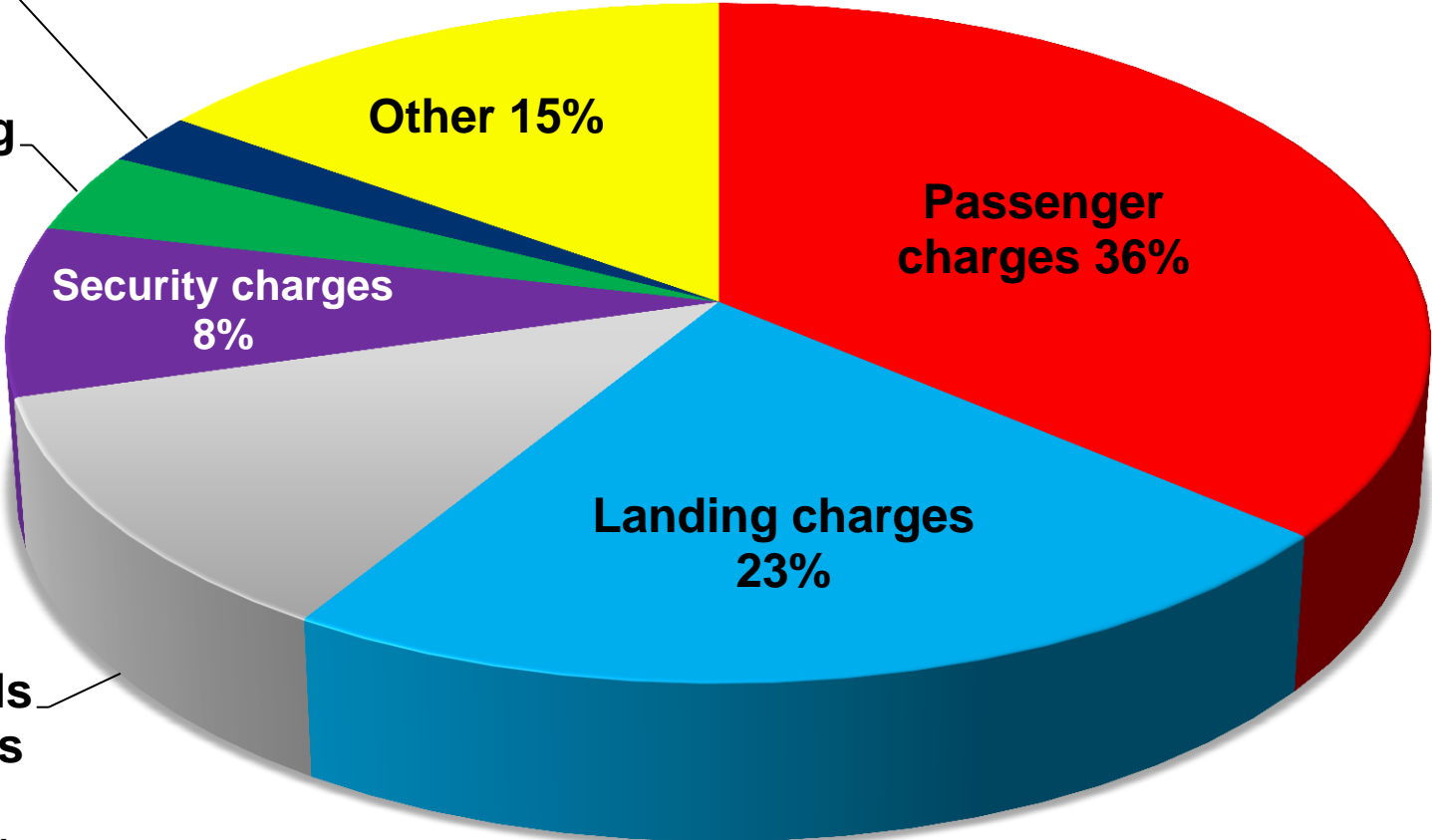
AERONAUTICAL INCOME BY SOURCE

Airport
improvement fees
(or Passenger
facility charge)
2%

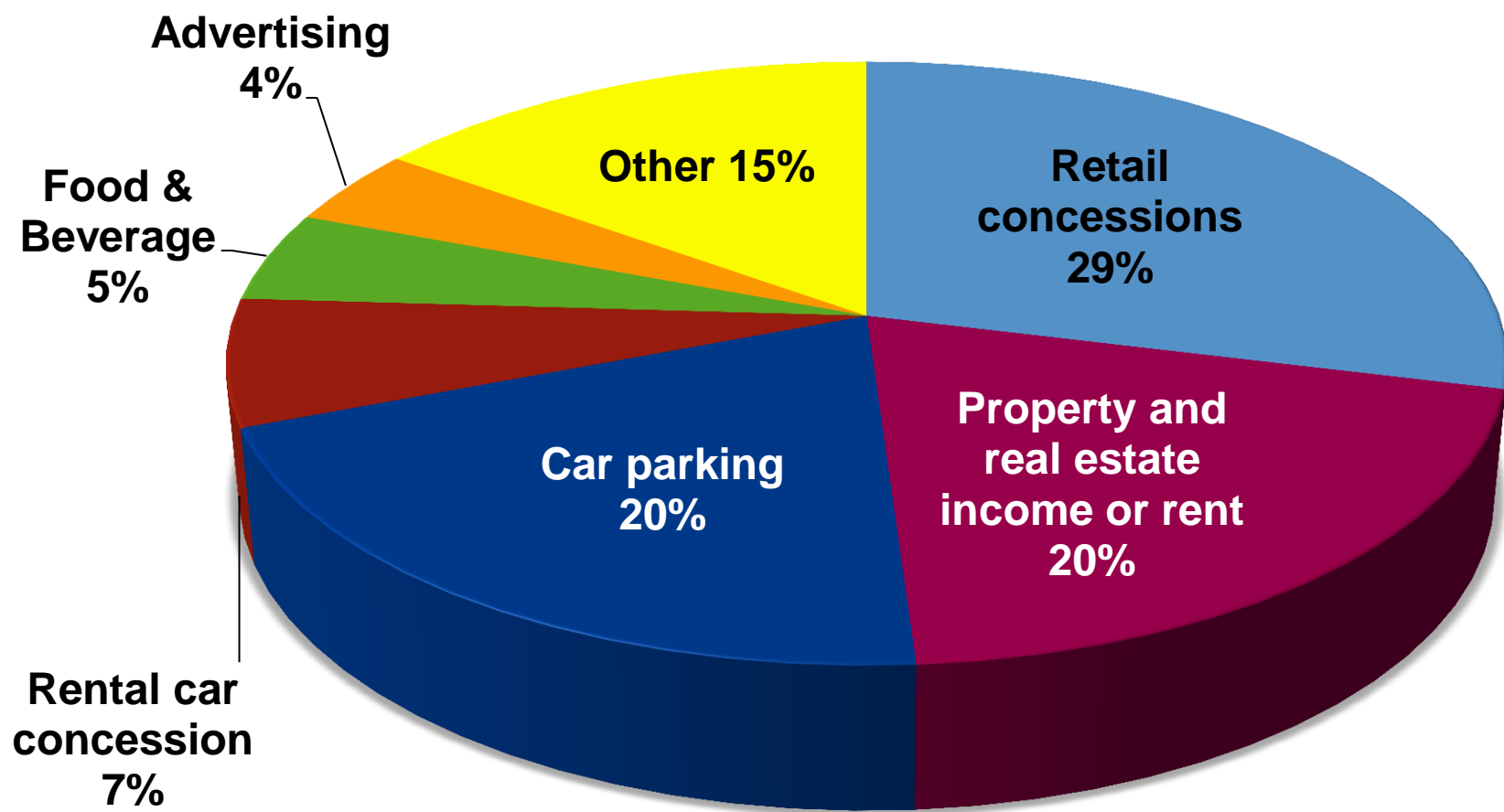
Ground handling
services
(excluding fuel
charges) 4%

Security charges
8%

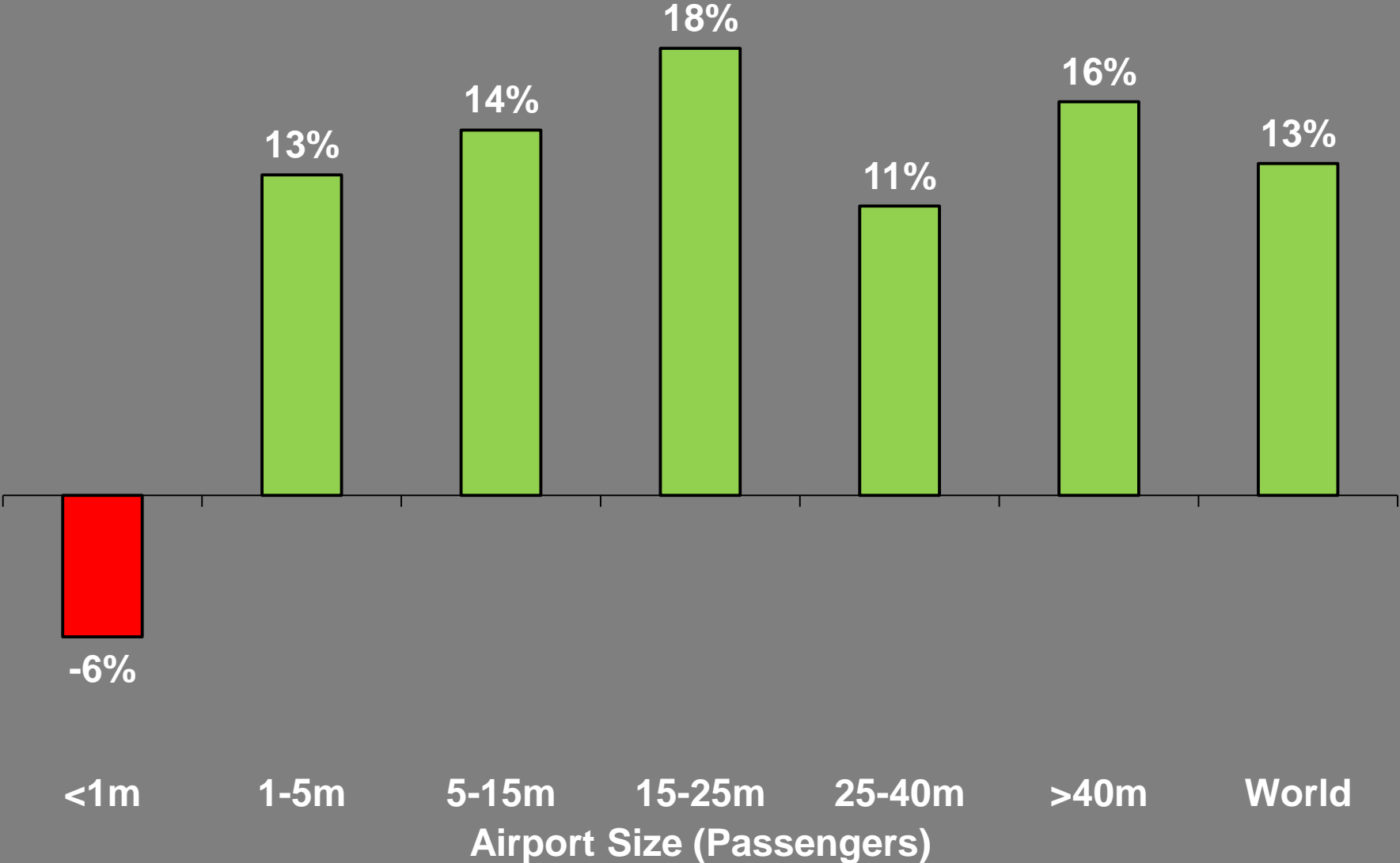
Terminal rentals
paid by airlines
for space
utilization 12%



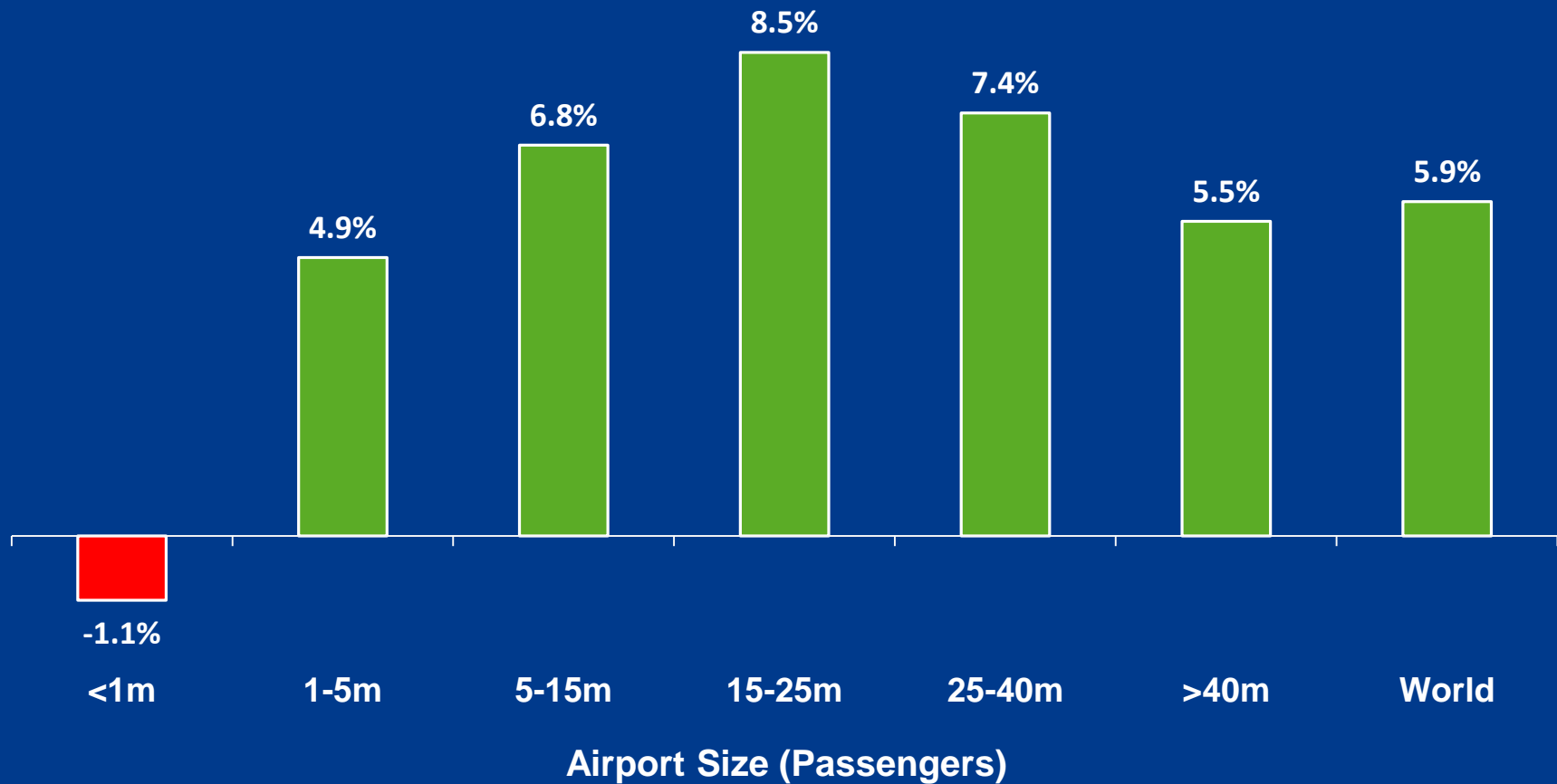
NON-AERONAUTICAL INCOME BY SOURCE



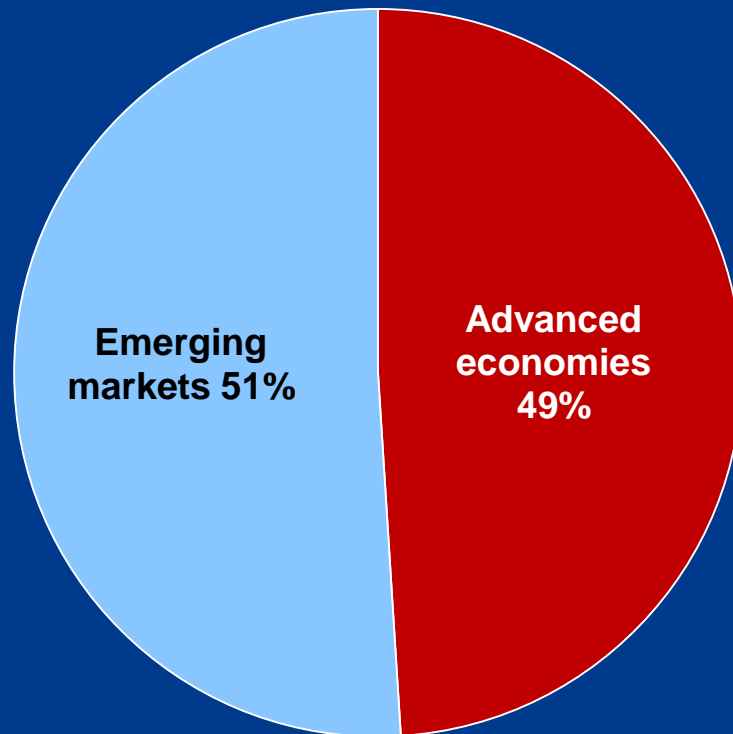
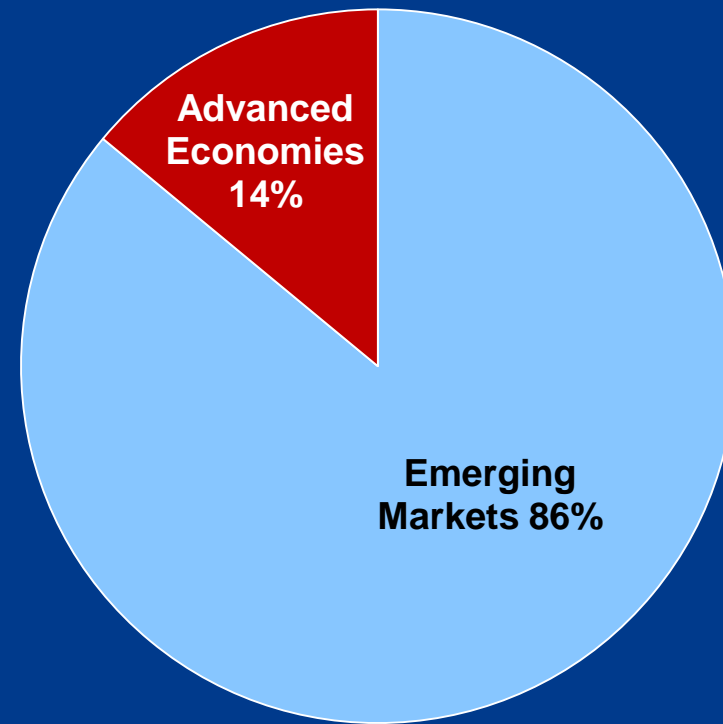
NET PROFIT MARGINS (2012)



RETURN ON INVESTED CAPITAL BY AIRPORT SIZE (2012)



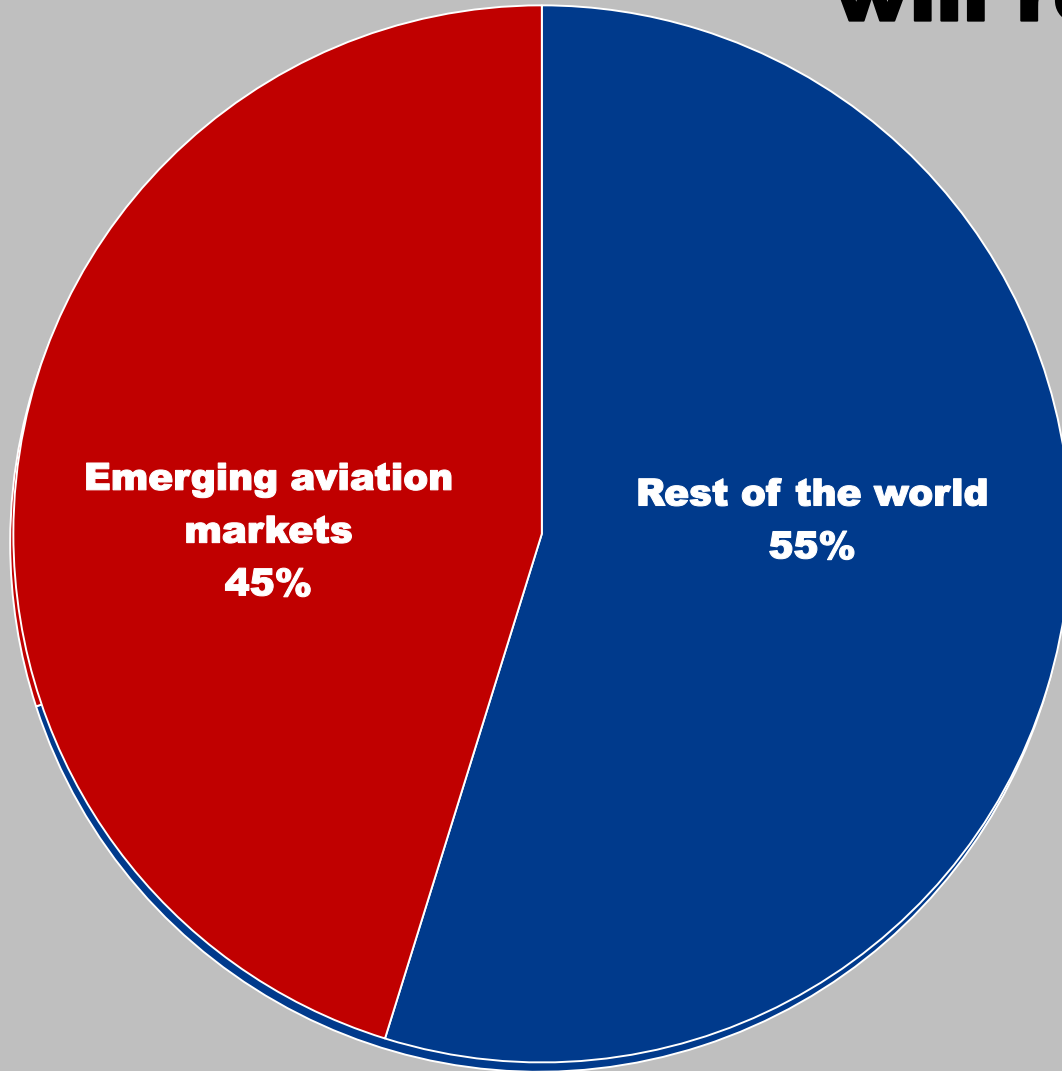
Proportion of global population by economic grouping (2012)



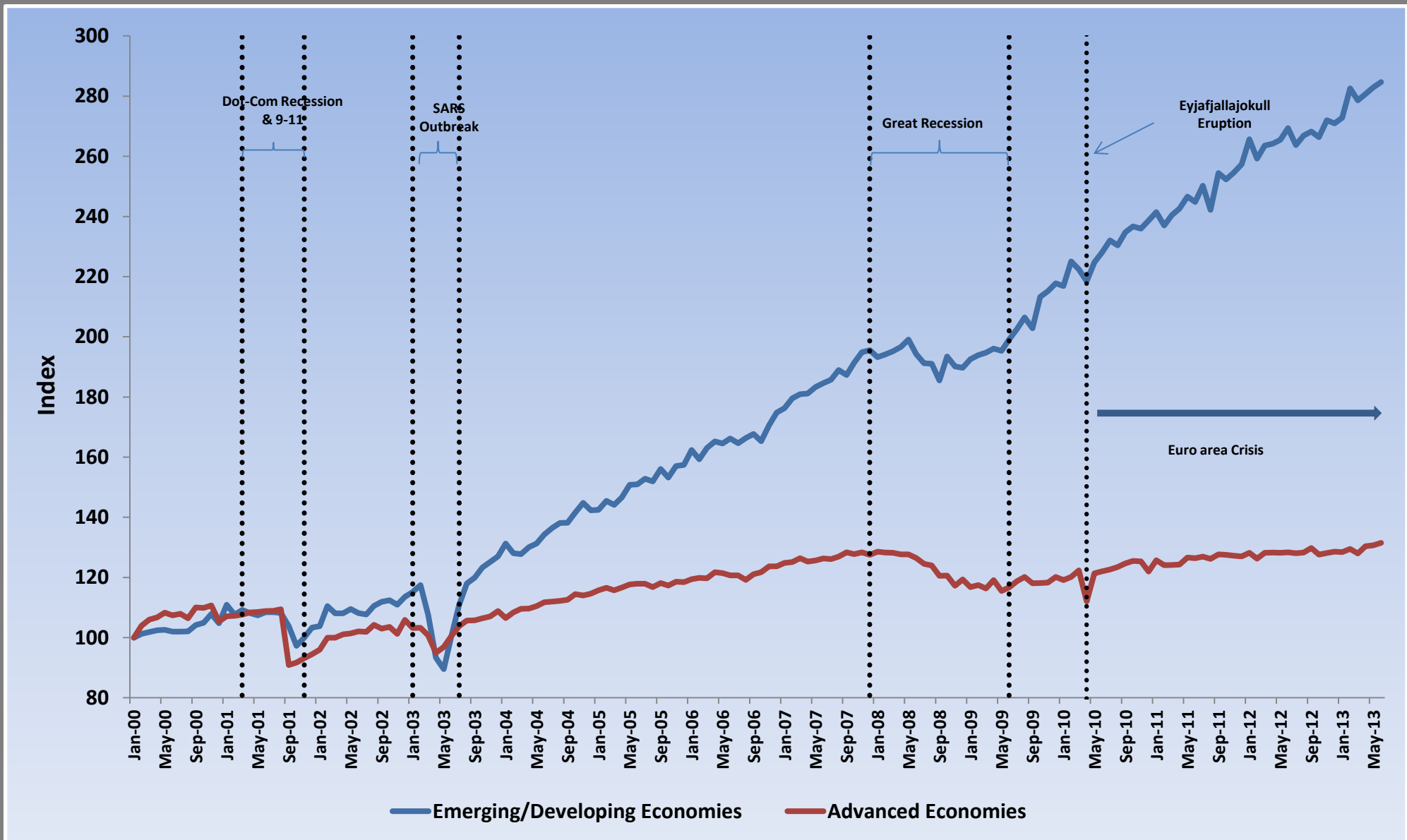
Proportion of global output by economic grouping (2012)

Source: International Monetary Fund
*The term "emerging markets" is used throughout to refer to the IMF classification "emerging markets and developing economies."

By 2037, emerging aviation markets traffic will represent 45% of worldwide traffic (2013) passenger traffic



Total passengers: Emerging vs. advanced economies (2000–2013)



WORLDWIDE PASSENGER TRAFFIC RANKINGS (2013 VS. 2012 AND 2003)

| City, Country | Airport | 2013 PAX (millions) | % Chg | Rank 2013 | Rank 2012 | Rank 2003 |
|---|--|------------------------|-------|--------------|--------------|--------------|
| Atlanta GA, USA | Hartsfield-Jackson Atlanta International Airport | 94.4 m | -1.1 | 1 | 1 | 1 |
| Beijing, China (People's Republic of China) | Beijing Capital International Airport | 83.7 m | 2.2 | 2 | 2 | 32 |
| London, United Kingdom | Heathrow Airport | 72.4 m | 3.3 | 3 | 3 | 3 |
| Tokyo, Japan | Tokyo International (Haneda) Airport | 68.9 m | 3.2 | 4 | 4 | 4 |
| Chicago IL, USA | O'Hare International Airport | 66.8 m | 0.2 | 5 | 5 | 2 |
| Los Angeles CA, USA | Los Angeles International Airport | 66.7 m | 4.7 | 6 | 6 | 5 |
| Dubai, United Arab Emirates | Dubai International Airport | 66.4 m | 15.2 | 7 | 10 | 54 |
| Paris, France | Aéroport de Paris-Charles de Gaulle | 62.1 m | 0.7 | 8 | 7 | 8 |
| Dallas/Fort Worth TX, USA | Dallas/Ft Worth International Airport | 60.5 m | 3.2 | 9 | 8 | 6 |
| Jakarta, Indonesia | Soekarno-Hatta International Airport | 60.1 m | 4.1 | 10 | 9 | 45 |

WORLDWIDE PASSENGER TRAFFIC RANKINGS (2013 VS. 2012 AND 2003)

| City, Country | Airport | 2013 PAX (millions) | % Chg | Rank 2013 | Rank 2012 | Rank 2003 |
|---|--|------------------------|-------|--------------|--------------|--------------|
| Atlanta GA, USA | Hartsfield-Jackson Atlanta International Airport | 94.4 m | -1.1 | 1 | 1 | 1 |
| Beijing, China (People's Republic of China) | Beijing Capital International Airport | 83.7 m | 2.2 | 2 | 2 | 32 |
| London, United Kingdom | Heathrow Airport | 72.4 m | 3.3 | 3 | 3 | 3 |
| Tokyo, Japan | Tokyo International (Haneda) Airport | 68.9 m | 3.2 | 4 | 4 | 4 |
| Chicago IL, USA | O'Hare International Airport | 66.8 m | 0.2 | 5 | 5 | 2 |
| Los Angeles CA, USA | Los Angeles International Airport | 66.7 m | 4.7 | 6 | 6 | 5 |
| Dubai, United Arab Emirates | Dubai International Airport | 66.4 m | 15.2 | 7 | 10 | 54 |
| Paris, France | Aéroport de Paris-Charles de Gaulle | 62.1 m | 0.7 | 8 | 7 | 8 |
| Dallas/Fort Worth TX, USA | Dallas/Ft Worth International Airport | 60.5 m | 3.2 | 9 | 8 | 6 |
| Jakarta, Indonesia | Soekarno-Hatta International Airport | 60.1 m | 4.1 | 10 | 9 | 45 |

WORLDWIDE PASSENGER TRAFFIC RANKINGS (2013 VS. 2012 AND 2003)

| City, Country | Airport | 2013 PAX (millions) | % Chg | Rank 2013 | Rank 2012 | Rank 2003 |
|---|--|------------------------|-------|--------------|--------------|--------------|
| Atlanta GA, USA | Hartsfield-Jackson Atlanta International Airport | 94.4 m | -1.1 | 1 | 1 | 1 |
| Beijing, China (People's Republic of China) | Beijing Capital International Airport | 83.7 m | 2.2 | 2 | 2 | 32 |
| London, United Kingdom | Heathrow Airport | 72.4 m | 3.3 | 3 | 3 | 3 |
| Tokyo, Japan | Tokyo International (Haneda) Airport | 68.9 m | 3.2 | 4 | 4 | 4 |
| Chicago IL, USA | O'Hare International Airport | 66.8 m | 0.2 | 5 | 5 | 2 |
| Los Angeles CA, USA | Los Angeles International Airport | 66.7 m | 4.7 | 6 | 6 | 5 |
| Dubai, United Arab Emirates | Dubai International Airport | 66.4 m | 15.2 | 7 | 10 | 54 |
| Paris, France | Aéroport de Paris-Charles de Gaulle | 62.1 m | 0.7 | 8 | 7 | 8 |
| Dallas/Fort Worth TX, USA | Dallas/Ft Worth International Airport | 60.5 m | 3.2 | 9 | 8 | 6 |
| Jakarta, Indonesia | Soekarno-Hatta International Airport | 60.1 m | 4.1 | 10 | 9 | 45 |

WORLDWIDE PASSENGER TRAFFIC RANKINGS (2013 VS. 2012 AND 2003)

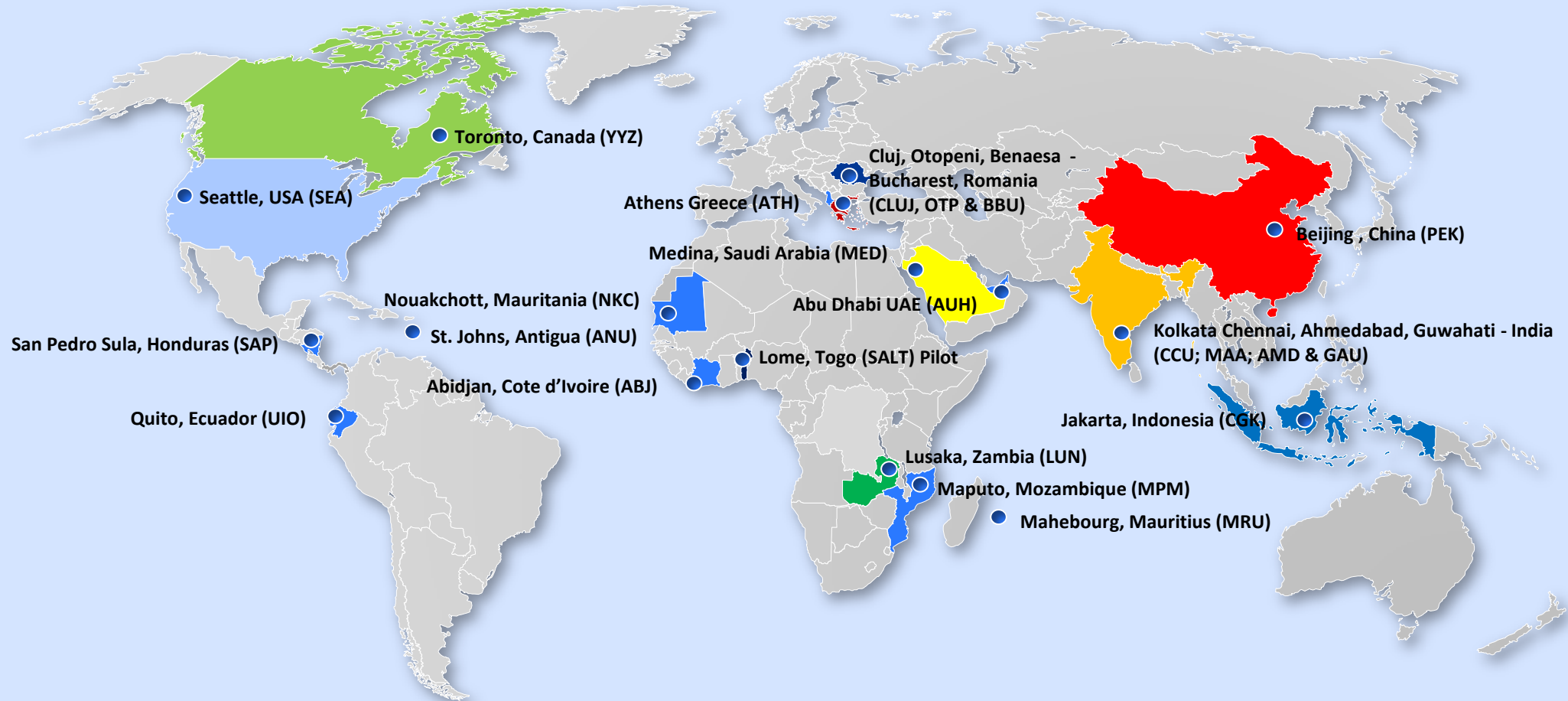
| City, Country | Airport | 2013 PAX (millions) | % Chg | Rank 2013 | Rank 2012 | Rank 2003 |
|---|--|------------------------|-------|--------------|--------------|--------------|
| Atlanta GA, USA | Hartsfield-Jackson Atlanta International Airport | 94.4 m | -1.1 | 1 | 1 | 1 |
| Beijing, China (People's Republic of China) | Beijing Capital International Airport | 83.7 m | 2.2 | 2 | 2 | 32 |
| London, United Kingdom | Heathrow Airport | 72.4 m | 3.3 | 3 | 3 | 3 |
| Tokyo, Japan | Tokyo International (Haneda) Airport | 68.9 m | 3.2 | 4 | 4 | 4 |
| Chicago IL, USA | O'Hare International Airport | 66.8 m | 0.2 | 5 | 5 | 2 |
| Los Angeles CA, USA | Los Angeles International Airport | 66.7 m | 4.7 | 6 | 6 | 5 |
| Dubai, United Arab Emirates | Dubai International Airport | 66.4 m | 15.2 | 7 | 10 | 54 |
| Paris, France | Aéroport de Paris-Charles de Gaulle | 62.1 m | 0.7 | 8 | 7 | 8 |
| Dallas/Fort Worth TX, USA | Dallas/Ft Worth International Airport | 60.5 m | 3.2 | 9 | 8 | 6 |
| Jakarta, Indonesia | Soekarno-Hatta International Airport | 60.1 m | 4.1 | 10 | 9 | 45 |

WORLDWIDE PASSENGER TRAFFIC RANKINGS (2013 VS. 2012 AND 2003)

| City, Country | Airport | 2013 PAX (millions) | % Chg | Rank 2013 | Rank 2012 | Rank 2003 |
|------------------------|--|------------------------|-------|--------------|--------------|--------------|
| Hong Kong, China | Hong Kong International Airport | 59.6 m | 6.3% | 11 | 12 | 24 |
| Frankfurt, Germany | Frankfurt International Airport | 58 m | 0.9% | 12 | 11 | 7 |
| Singapore | Changi International Airport | 53.7 m | 5.0% | 13 | 15 | 30 |
| Amsterdam, Netherlands | Schiphol International Airport | 52.6 m | 3.0% | 14 | 16 | 9 |
| Denver CO, USA | Denver International Airport | 52.5 m | -1.1% | 15 | 13 | 10 |
| Guangzhou, China | Guangzhou Baiyun International Airport | 52.4 m | 8.6% | 16 | 18 | 70 |
| Bangkok, Thailand | Suvarnabhumi International Airport | 51.4 m | -3.1% | 17 | 14 | 18 |
| Istanbul, Turkey | Istanbul Ataturk International Airport | 51.3 m | 13.7% | 18 | 20 | 77 |
| New York NY, USA | John F. Kennedy International Airport | 50.4 m | 2.3% | 19 | 17 | 17 |
| Kuala Lumpur, Malaysia | Kuala Lumpur International Airport | 47.5 m | 19.1% | 20 | 27 | 59 |



APEX IN SAFETY REVIEWS





**SECURITY ACCESS AND SECURITY (SAE) PROJECT
HARMONIZATION OF ACI AND IATA GUIDANCE ON
GROUND OPERATIONS (ACI AIRSIDE SAFETY HANDBOOK
AND IATA GROUND OPERATIONS MANUAL)
AUTOMATED BORDER CONTROL**

**COOPERATION ON THE DEVELOPMENT AND MAINTENANCE OF
SIGNING OF MOU WITH IATA
TECHNICAL SPECIFICATIONS FOR DATA EXCHANGE**

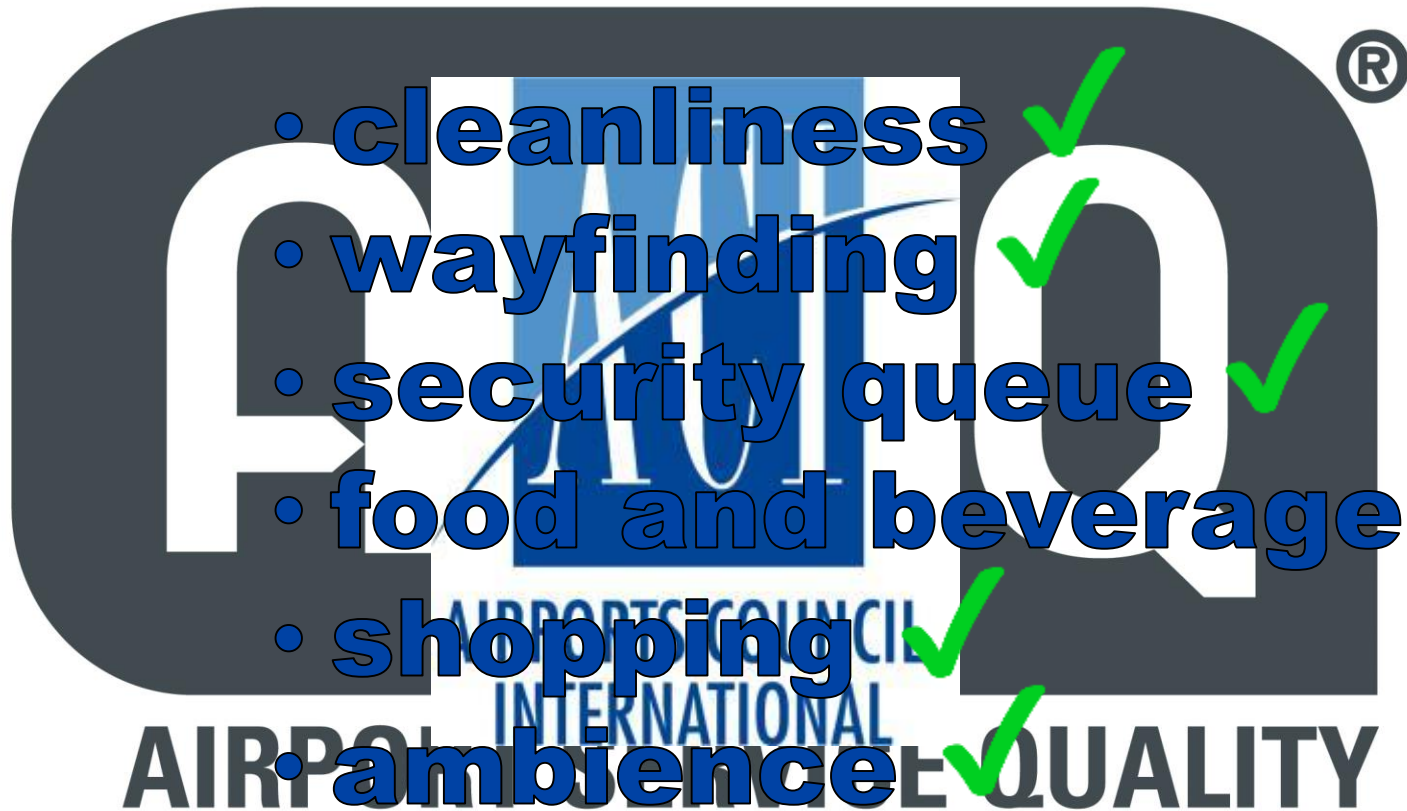
**CARBON-
NEUTRAL
GROWTH
BY
2020**





airport carbon accreditation

MAPPING | REDUCTION | OPTIMISATION | NEUTRALITY



- **cleanliness** ✓
- **wayfinding** ✓
- **security queue** ✓
- **food and beverage** ✓
- **shopping** ✓
- **ambience** ✓

AIRPORTS COUNCIL INTERNATIONAL QUALITY




2013 ASQ WINNERS

Passengers

YOUR AIRPORT.YOUR NEEDS.





- AELP** Airport Executive Leadership Programme
- AMPAP** Global ACI - ICAO Airport Management Professional Accreditation Programme 
- GSN** Global Safety Network Diploma Programme
- AODP** Airport Operations Diploma Programme



DNA ASSISTANCE PROGRAMME



AMPAP GRADUATION, MAY 2014



The
voice of the
world's
airports



Leading, representing and serving the global airport community

www.aci.aero