



GLOBAL AVIATION
STRATEGY SUMMIT
ICAO • World Bank • Routes



Long term Outlook

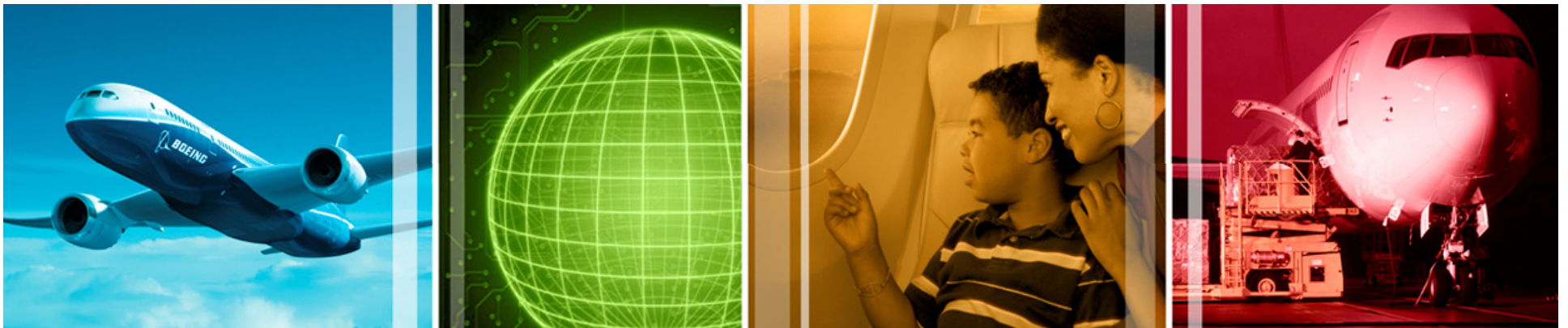
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Long-term outlook

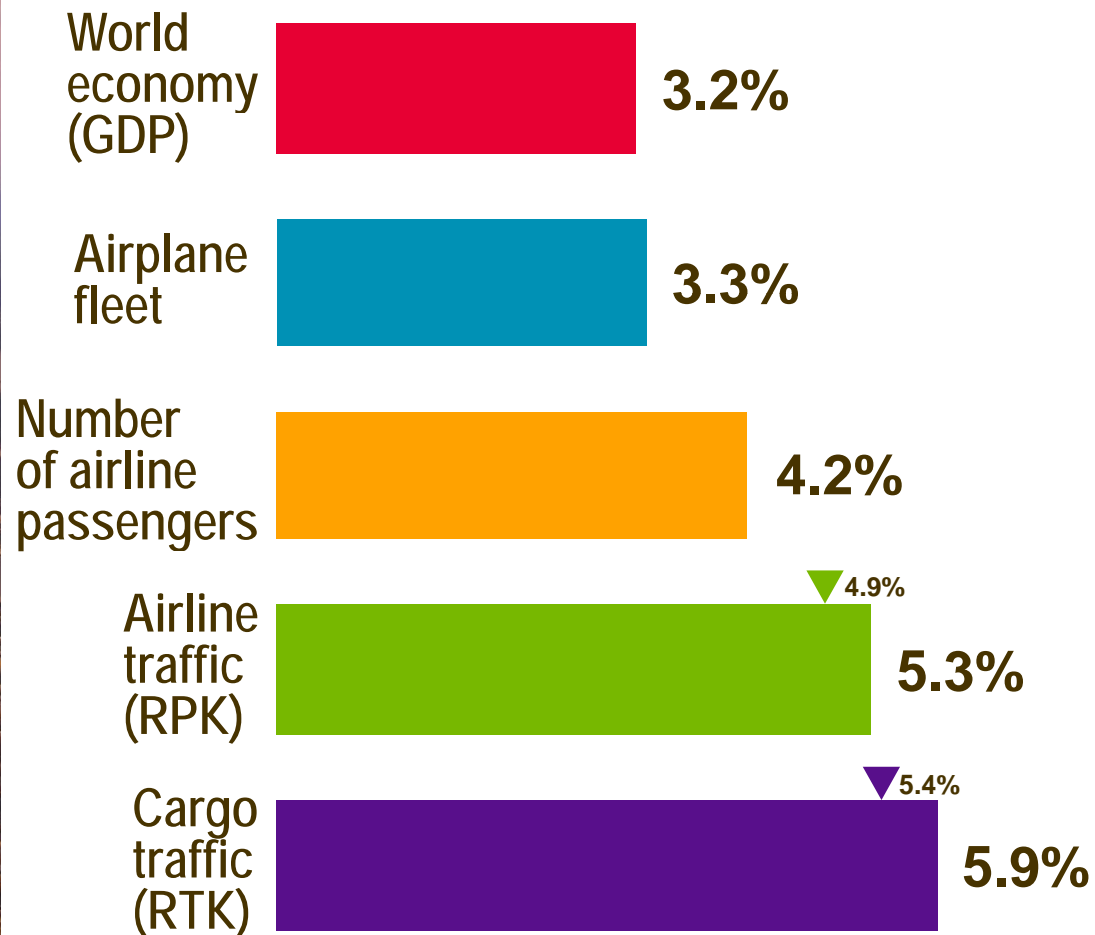
- Long-term air travel demand remains robust
 - Passenger air travel will grow at 5.3%, cargo at 5.9%
- Underlying fundamentals are in place:
 - Economic growth
 - World trade
 - Tourism and VFR
 - New airplane capabilities
 - Market liberalization
- Airlines will continue to adapt to market realities
 - Focusing on flexibility, profitability, consolidation, climate change,...
- To ensure growth, we need to set a proactive industry agenda in relation to ATM modernization, climate change challenges and security



20-year forecast: strong long-term growth



2009 to 2029

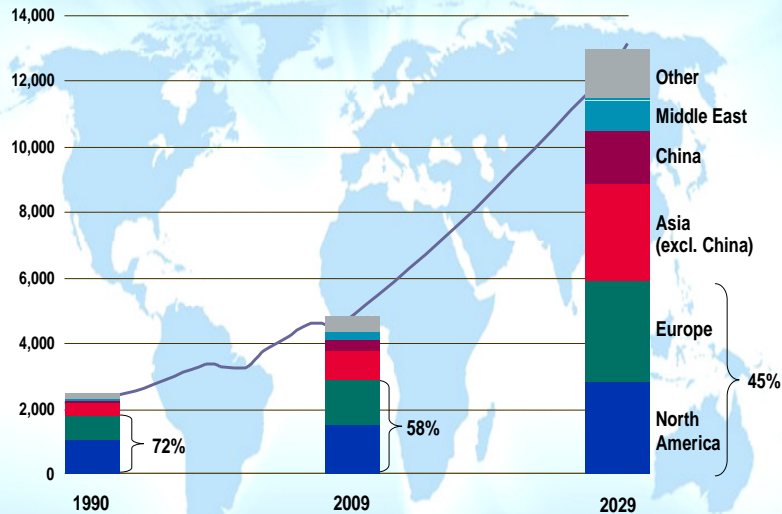


▽ 20-year traffic growth rates are higher than last year's forecast because they are calculated off a lower base year

Going forward.....

Air travel will become more diverse geographically

Air traffic, RPKs (billions)



Emerging business models will grow and gain market share

Air traffic, RPKs (billions)

