



International Civil Aviation Organization

MIDANPIRG STEERING GROUP

Fifth Meeting (MSG/5)
(Cairo, Egypt, 18 - 20 April 2016)

Agenda Item 5: MID Region Air Navigation 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

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.

1.2 The final ICAO traffic numbers for 2015 will be available at the end of June 2016. However, some initial statistics are available.

2. STATE OF AIR TRANSPORT IN THE MID REGION

2.1 The Middle East Region moved **14 per cent** of world Revenue Passenger-Kilometers (RPK) and recorded the highest annual growth of **12.1 per cent** in 2015. Seating capacity offered by the MID Region airlines in 2015, increased by around **13.8 per cent** in the Middle East compared to 2014.

2.2 With its combined economic strength and airline network expansion, the MID Region also recorded the highest international passenger traffic growth rate: **13.4 per cent**. This figure, along with the equally impressive **11.3 %** growth registered in freight traffic, were each more than double the comparable rates seen anywhere else in the world.

2.3 The airlines of the MID Region showed a stable growth in terms of aircraft departures. The total number of scheduled commercial departures in 2015 grew at a pace of **6.1 per cent** to reach about **1.22 million** departures, compared to **1.15** recorded in 2014 (source iSTARS).

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 2010-2030 is expected to increase at an average annual rate of 9.1 per cent. The Middle East-Africa Route Group is expected to experience the highest average annual growth rate of 10.4 per cent per annum, followed by Intra Middle East, Asia/Pacific-Middle East, North America-Middle East and Europe-Middle East Route Groups with growth rates of 10.3 per cent, 9.2 per cent, 8.8 per cent and 7.3 per cent respectively for the period concerned. The total aircraft movements to, from and within the Middle East Region are estimated to increase to be slightly above **5.2 millions** in **2030** at an average annual growth rate of 8.7 per cent over the same period.

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 The meeting may wish to note that the Seminar is scheduled for the First Quarter of 2017. States and all Organizations are encouraged to participate actively in the 2017 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; and

- b) urge States to implement the provisions of MIDANPIRG Conclusion 15/9 a);
- c) encourage States to attend and support the Aviation Data Analyses Seminar in 2017;
and
- d) identify a volunteer State to host the above-mentioned Seminar.

- END -