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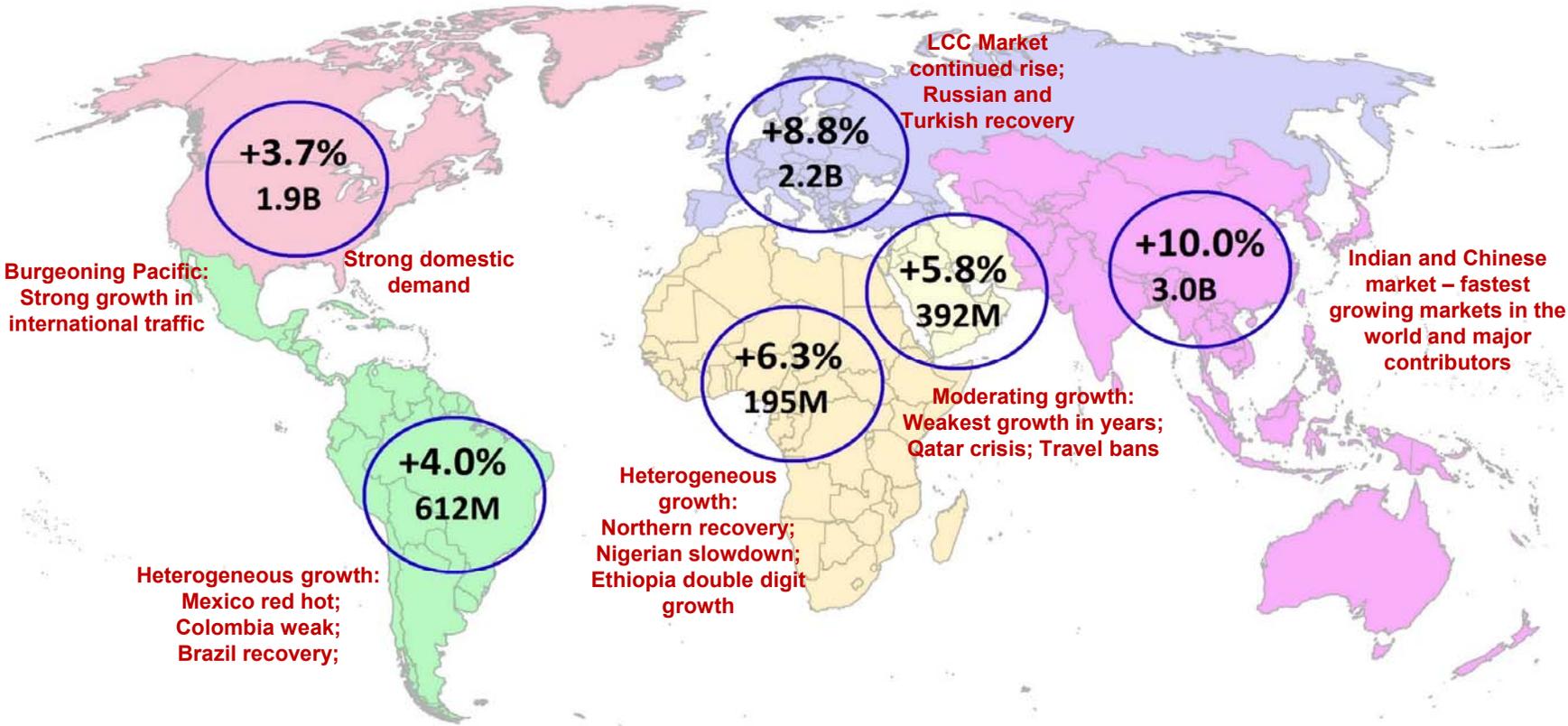
Airport & Air Navigation Charges Workshop (Rabat, Morocco 27-28 November 2018)

Outline

- 2017 passenger traffic volumes and growth rates
- Past and future contributions to growth in the MENA region.
- Medium and long-term forecasts
- Economic impact of the industry



Global passenger traffic 2017 : 8.3B (+7.5%)



Source: ACI World, 2018



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MENA passenger traffic 2017: 464 M (+6.4%)

North Africa:
72 M, 9.2%

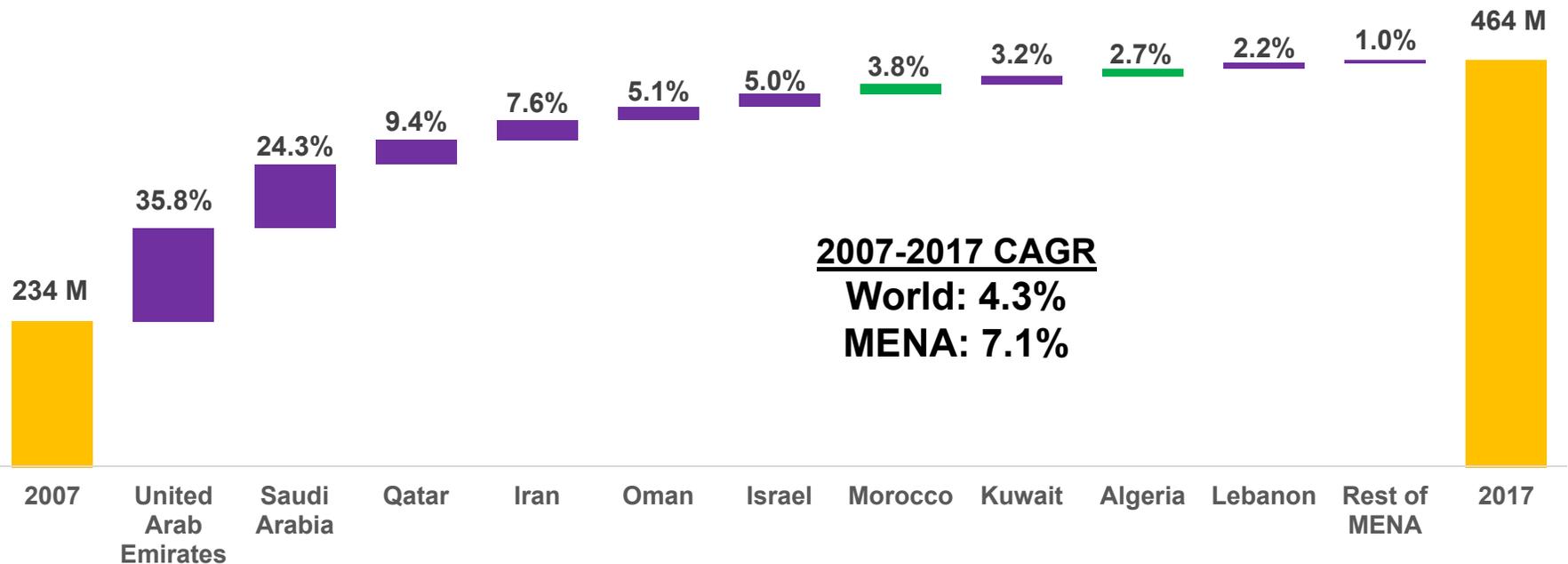


Middle East:
392 M, 5.8%

Rest of Africa:
123 M, 4.5%



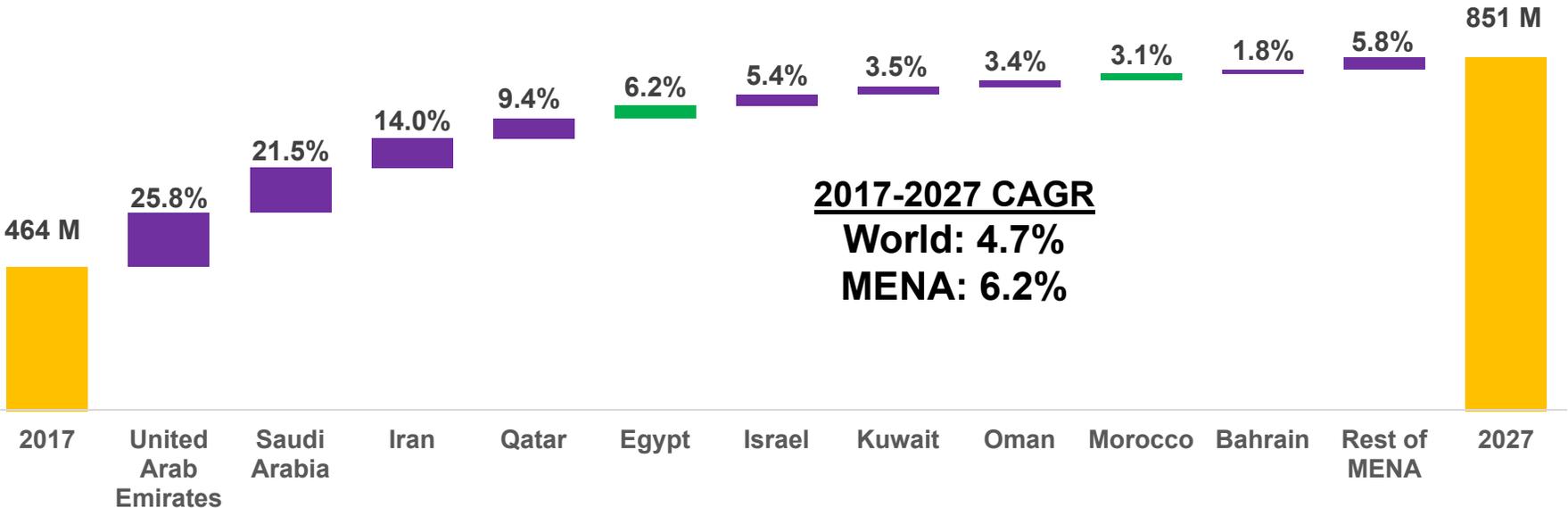
Contribution to MENA passenger traffic by major country share (2007-2017 compounded annual growth)





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Forecasted contribution to MENA passenger traffic by major country share (2017-2027 compounded annual growth)





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Medium-term and long-term forecasts for North Africa (NA) and the Middle East (ME) passenger traffic (CAGRs)

6.5% MENA - CAGR
5.2% World - CAGR

5.5% MENA - CAGR
4.1% World - CAGR



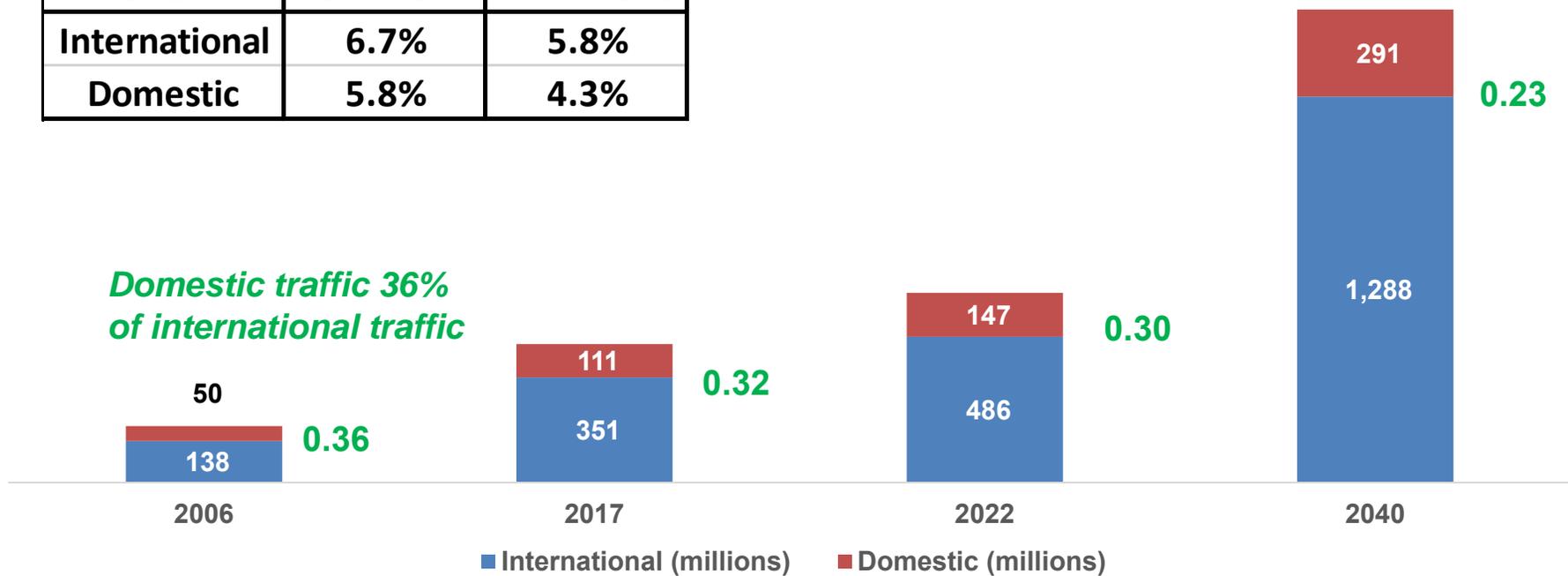
2017-2022 (medium term)

2017-2040 (long term)

■ NA ■ ME

MENA: domestic to international pax ratio

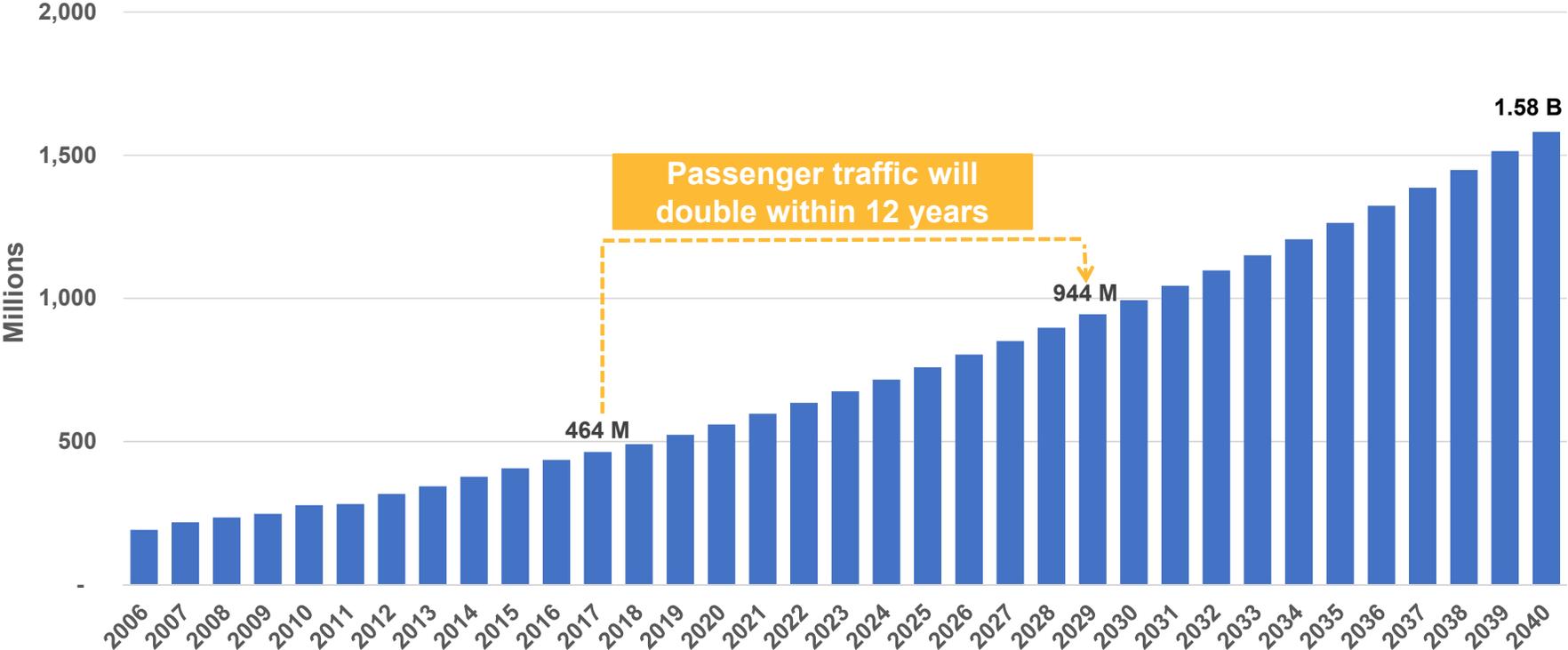
| CAGR | 2017-2022 | 2017-2040 |
|---------------|-----------|-----------|
| International | 6.7% | 5.8% |
| Domestic | 5.8% | 4.3% |





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Forecasted passenger traffic – MENA (2006-2040)



Need for infrastructure investment

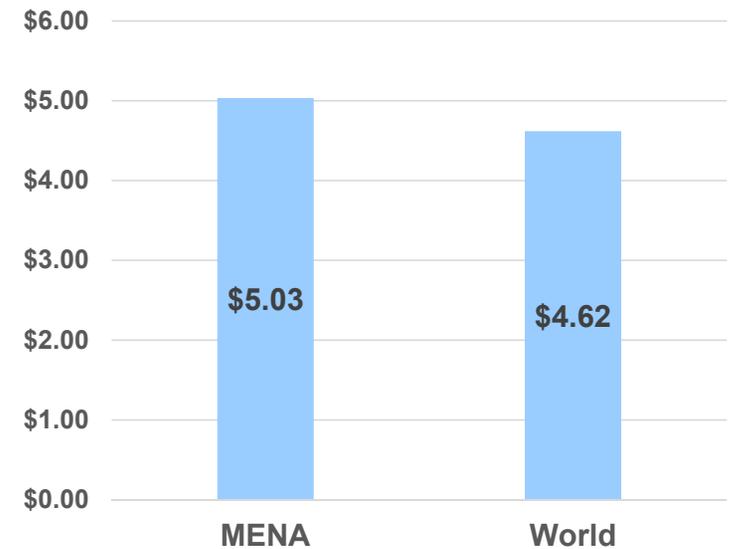
Airside projects:

- New runways or widening/lengthening existing ones
- Apron space to expand aircraft parking capacity

Landside Projects:

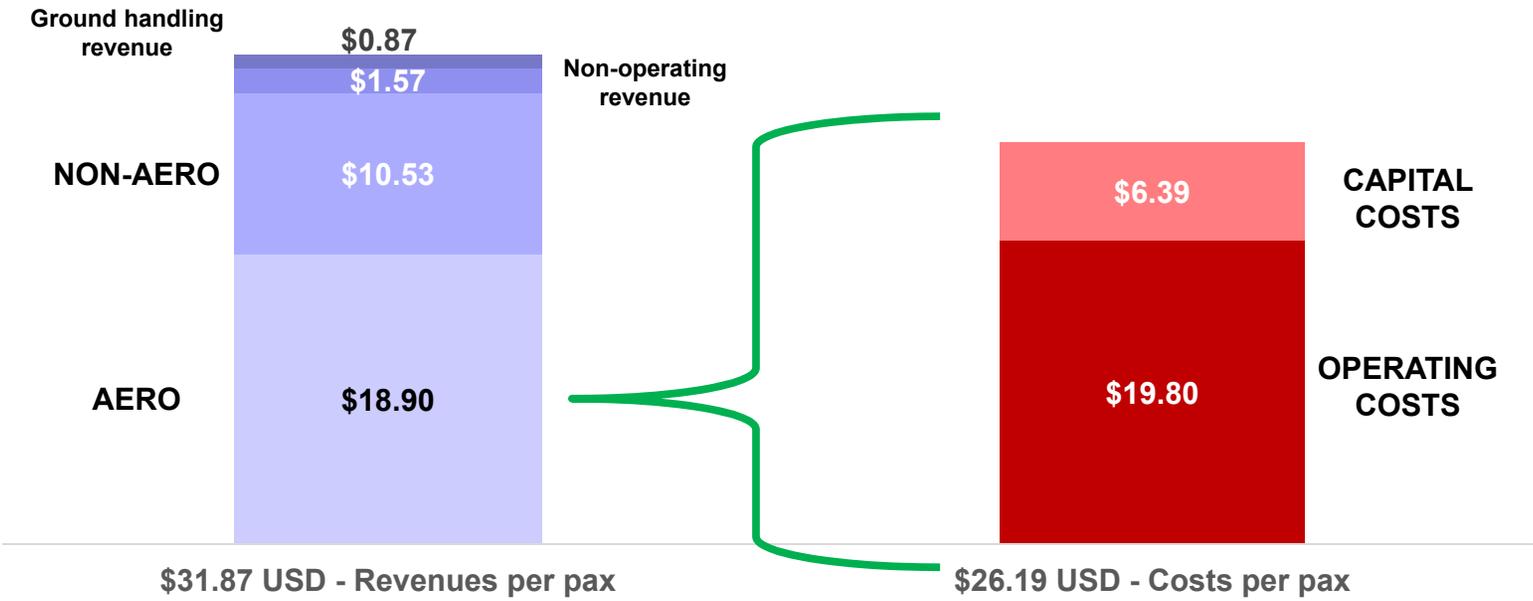
- Expanding capacity of passenger terminals
- Improving access to terminals through parking facilities or rail stations

Capital Expenditure per pax -
MENA versus World (2016)





Revenues and cost per pax in MENA (2016)

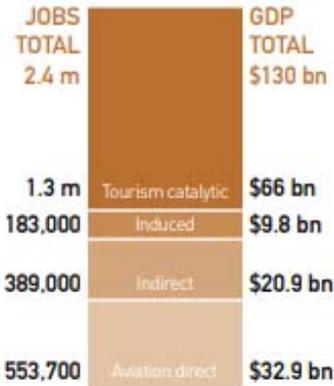




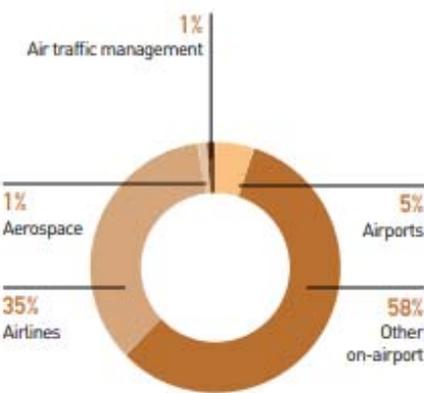
Economic contribution of the industry

- More than 400,000 jobs directly generated on airport sites in MENA
- The total GDP contribution of the industry reaches more than USD 23 Billion in the region

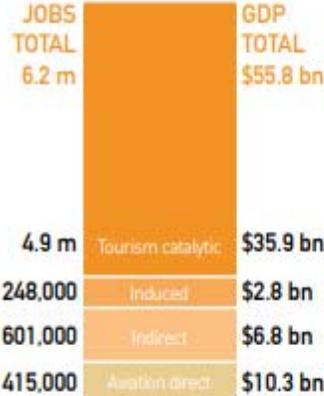
Total jobs and GDP supported by air transport in the Middle East



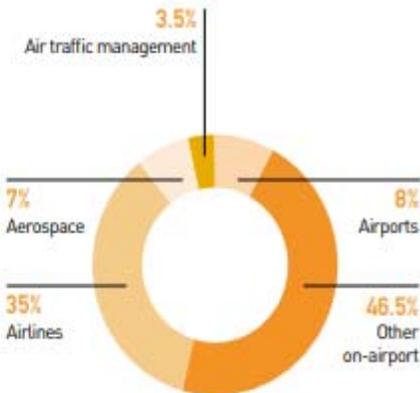
Direct jobs generated by air transport in the Middle East



Total jobs and GDP supported by air transport in Africa



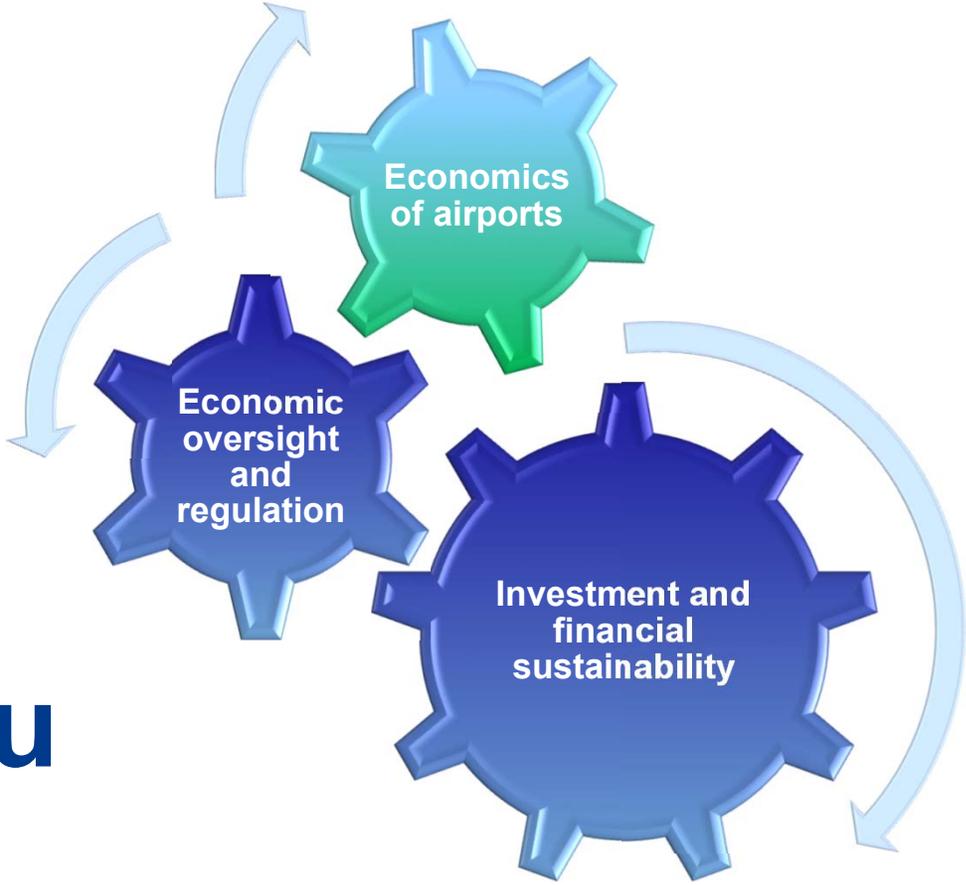
Direct jobs generated by air transport in Africa



Source: ATAG, *Aviation: Benefits Beyond Borders* (2018)



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Thank you