



SAFE SKIES.
**SUSTAINABLE
FUTURE.**



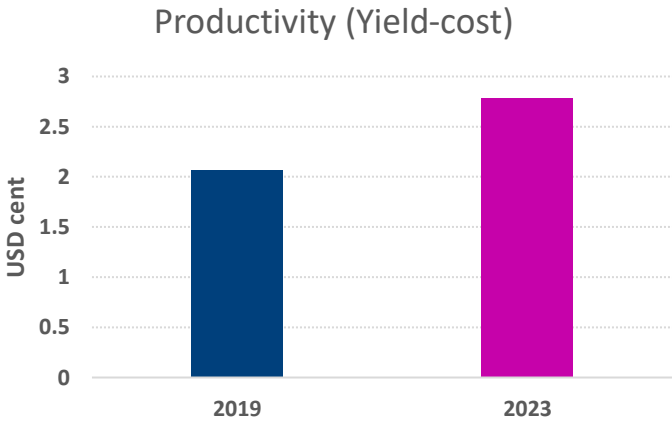
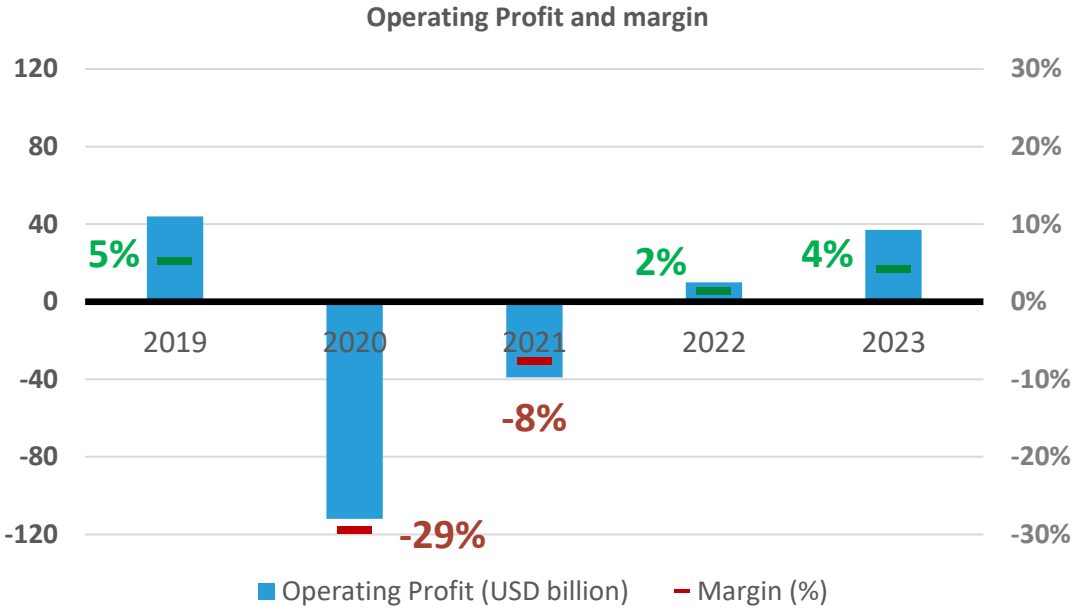
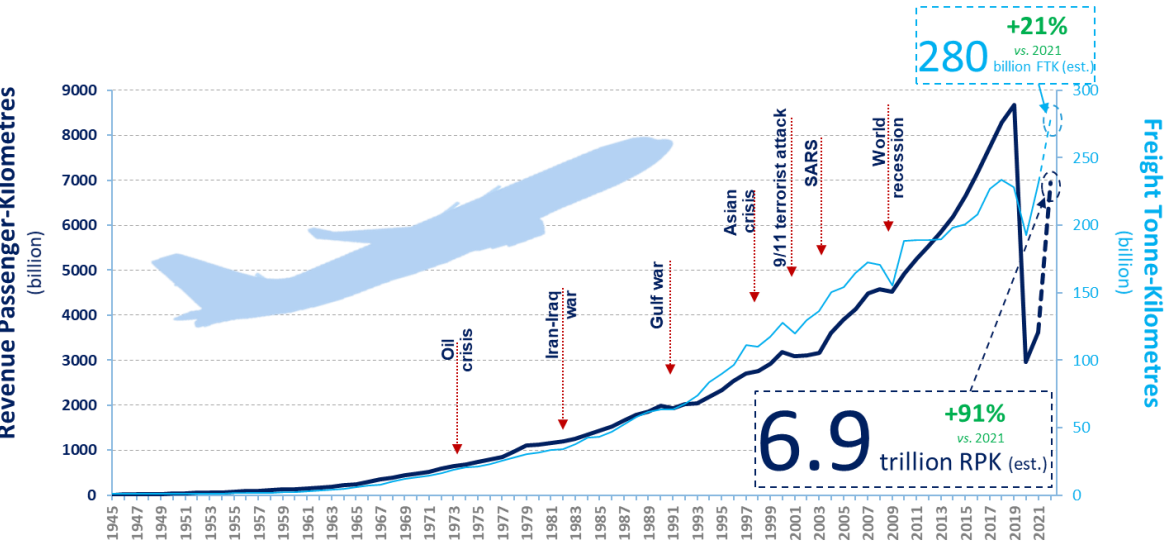
Setting the Scene

Sai Nayaran

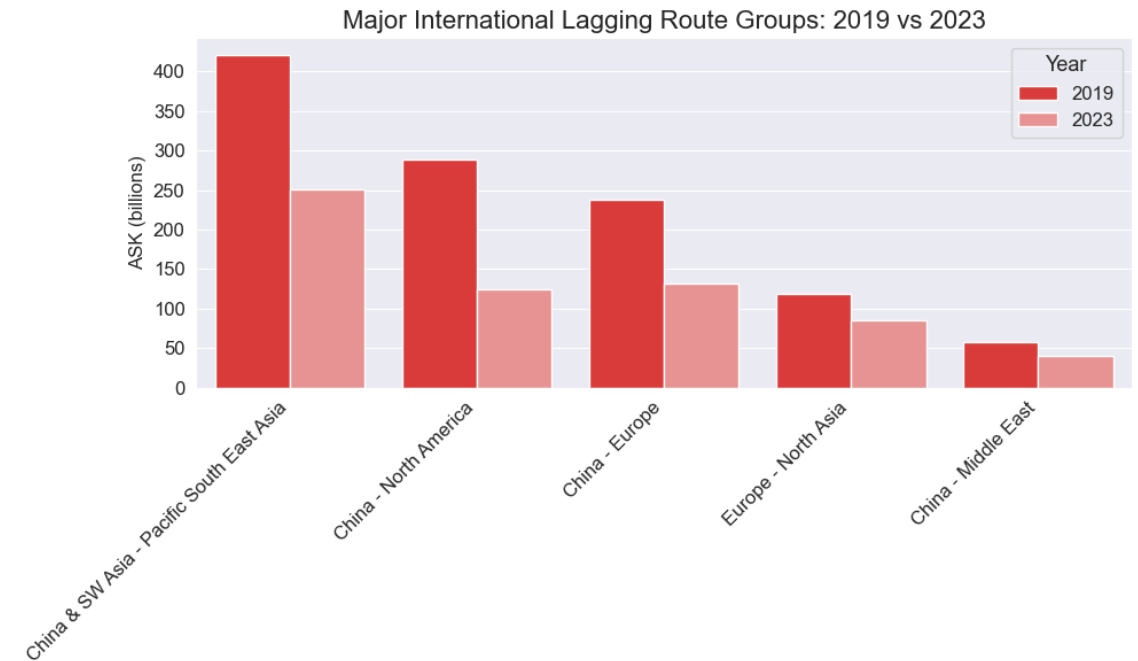
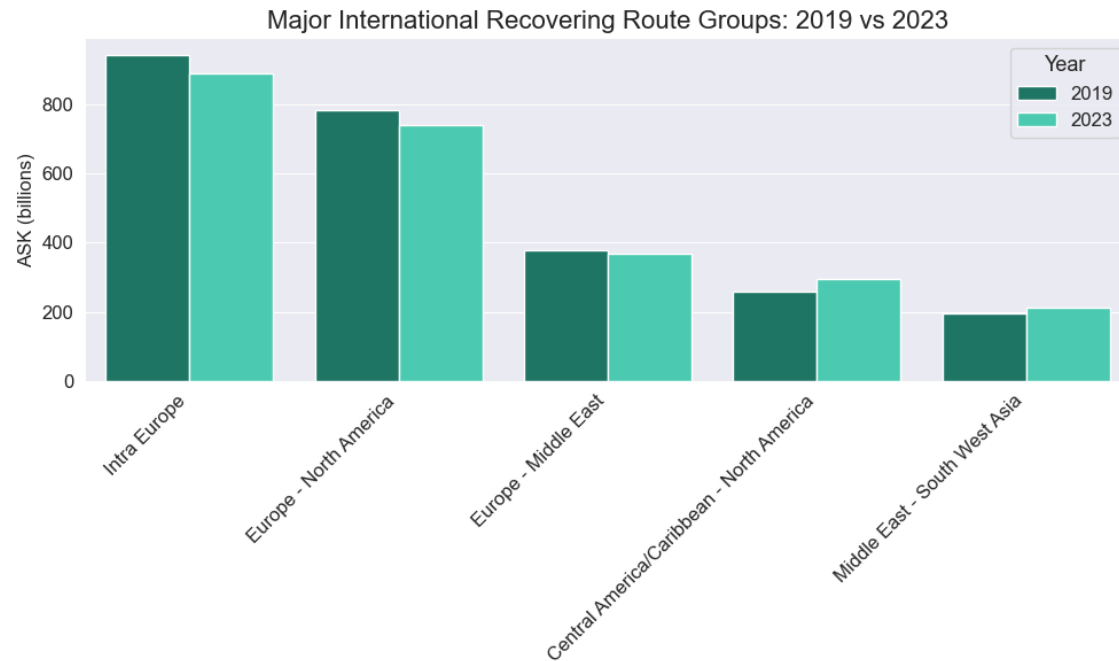
Chief ICAO/ATB/ADA

Overview of Recovery in 2023

Period	ASK	RPK	FTK
2023 versus 2019 levels	94%	93%	97%



Recovery by Route Group 2023

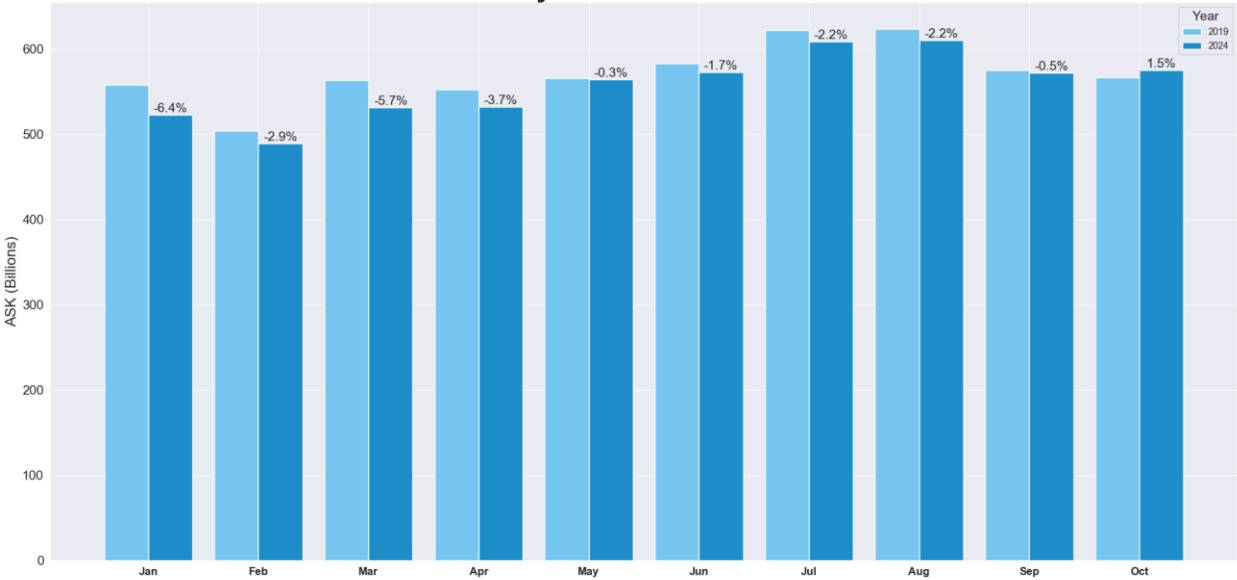


	Number of Route Groups	Proportion of Traffic in 2019	December 2023 vs 2019 levels
Recovering* Route Groups	38	82%	103%
Lagging Route Groups	12	18%	76%

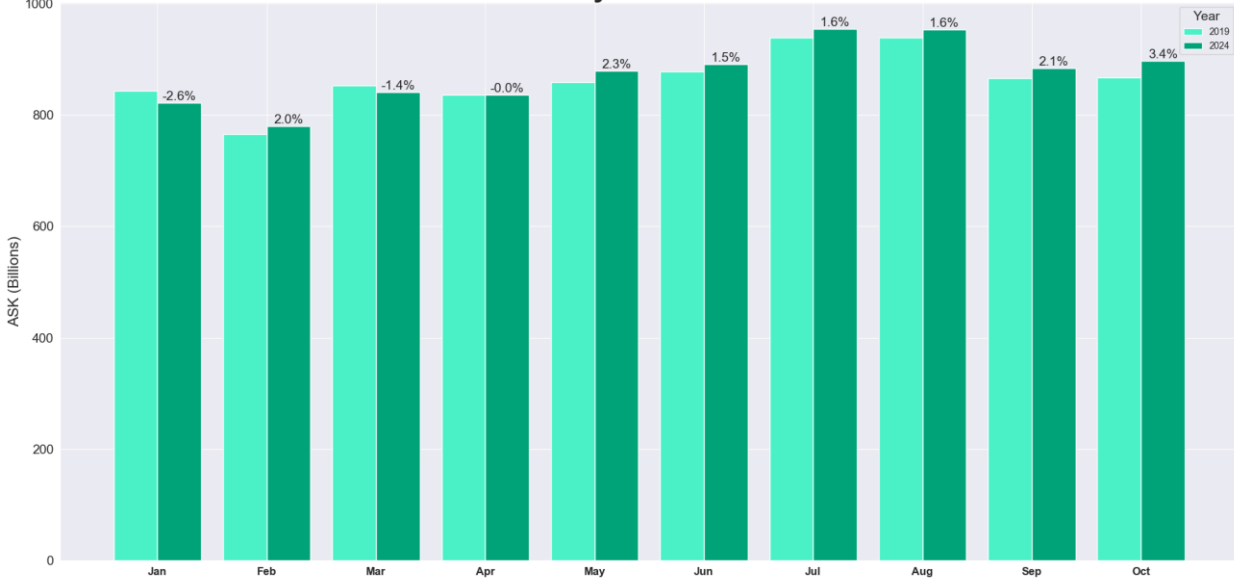
*2023 levels above 90% of 2019 levels

Global Recovery In 2024

ASK by Month - International

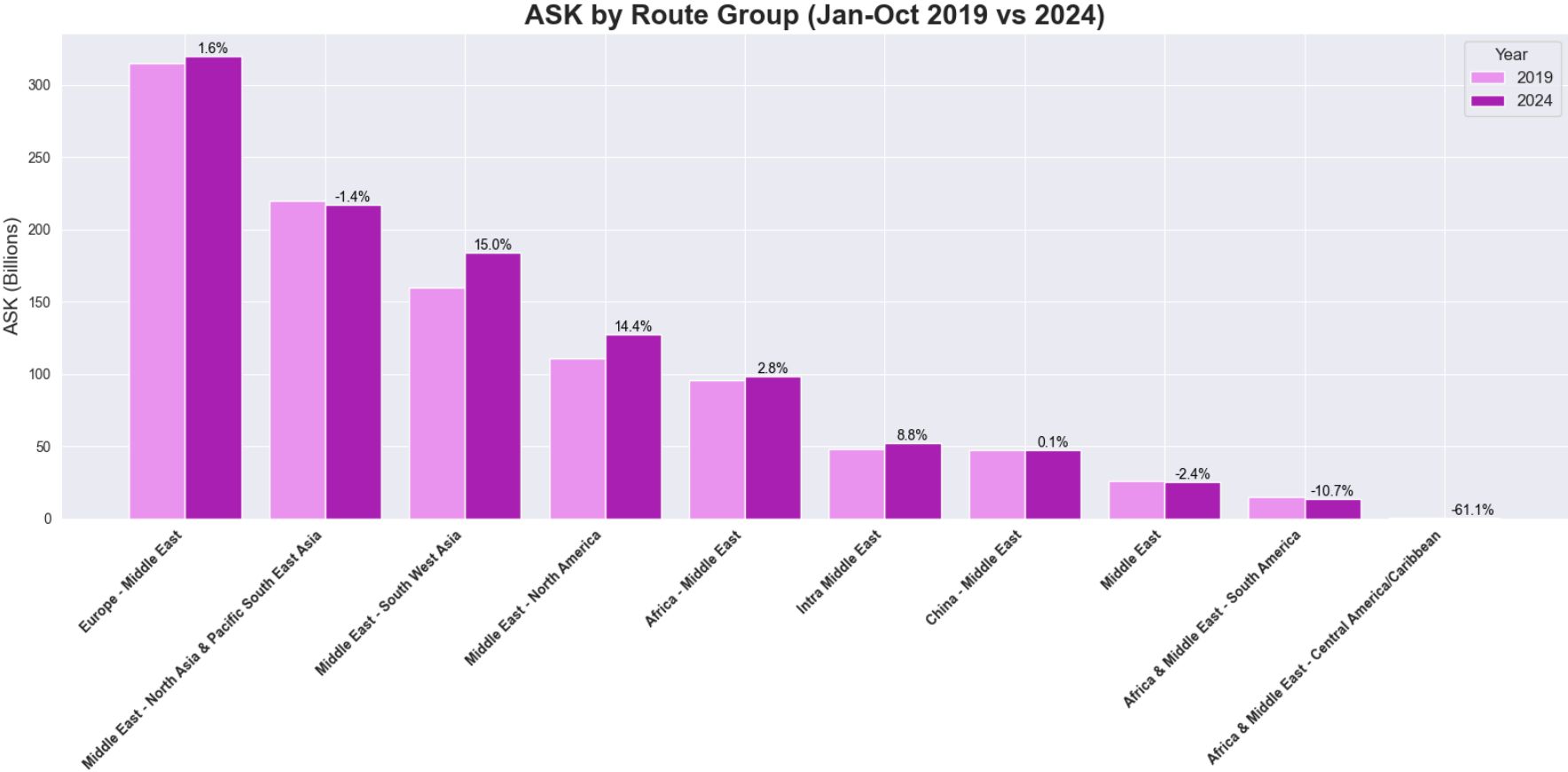


ASK by Month - Total



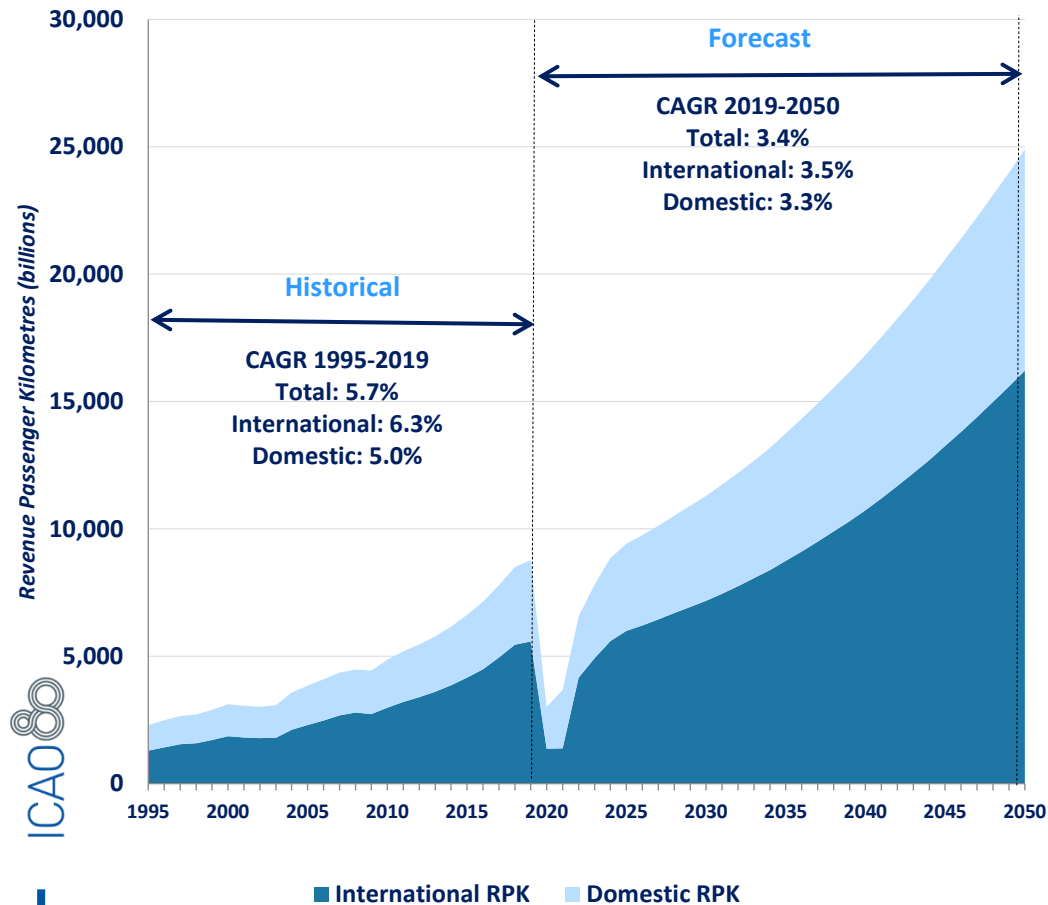
	International	Domestic	Total
Jan-Oct 2024 vs 2019	98%	108%	101%

Middle East Recovery In 2024

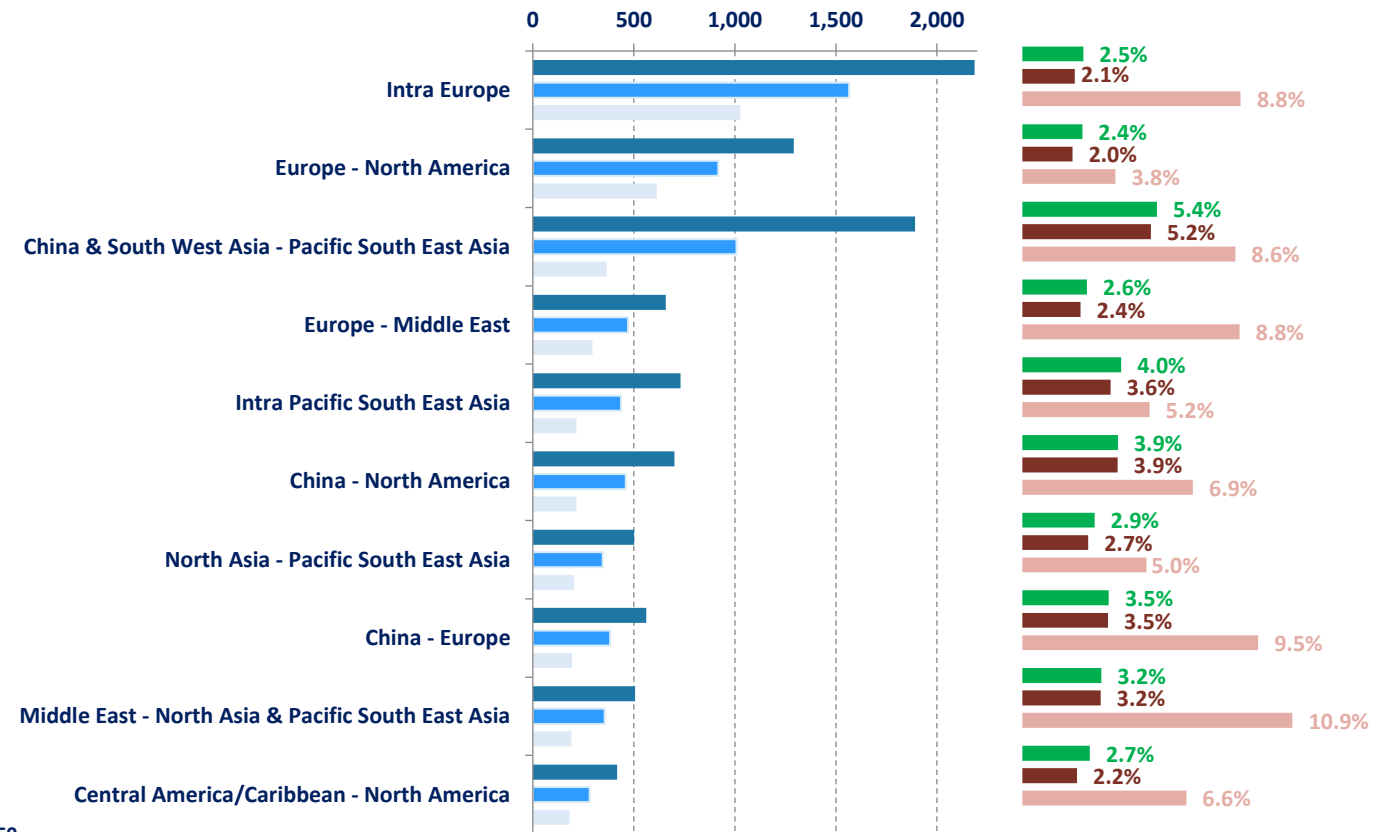


	International	Domestic	Total
Jan-Oct 2024 vs 2019	105%	98%	104%

ICAO LTF Passenger Forecasts



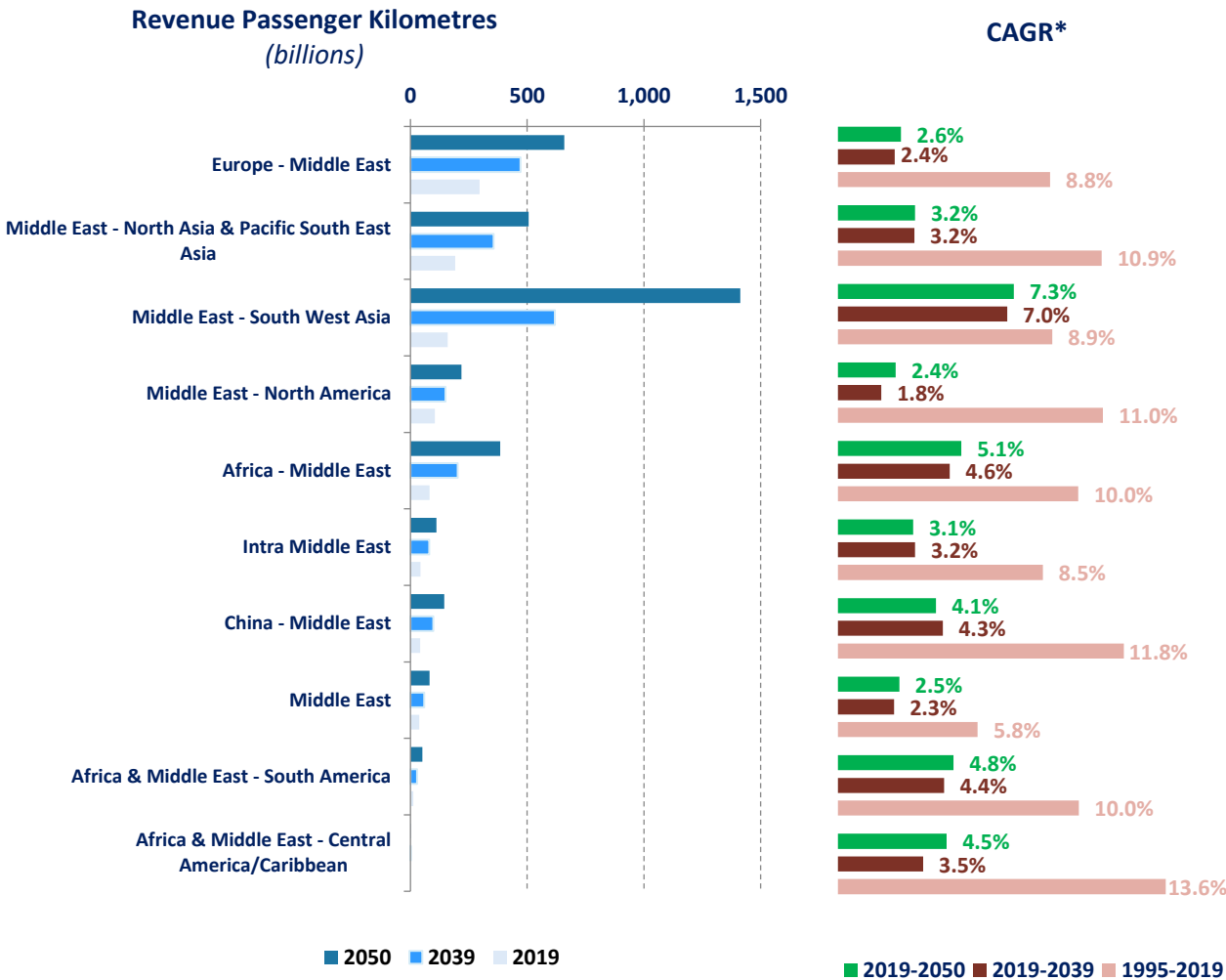
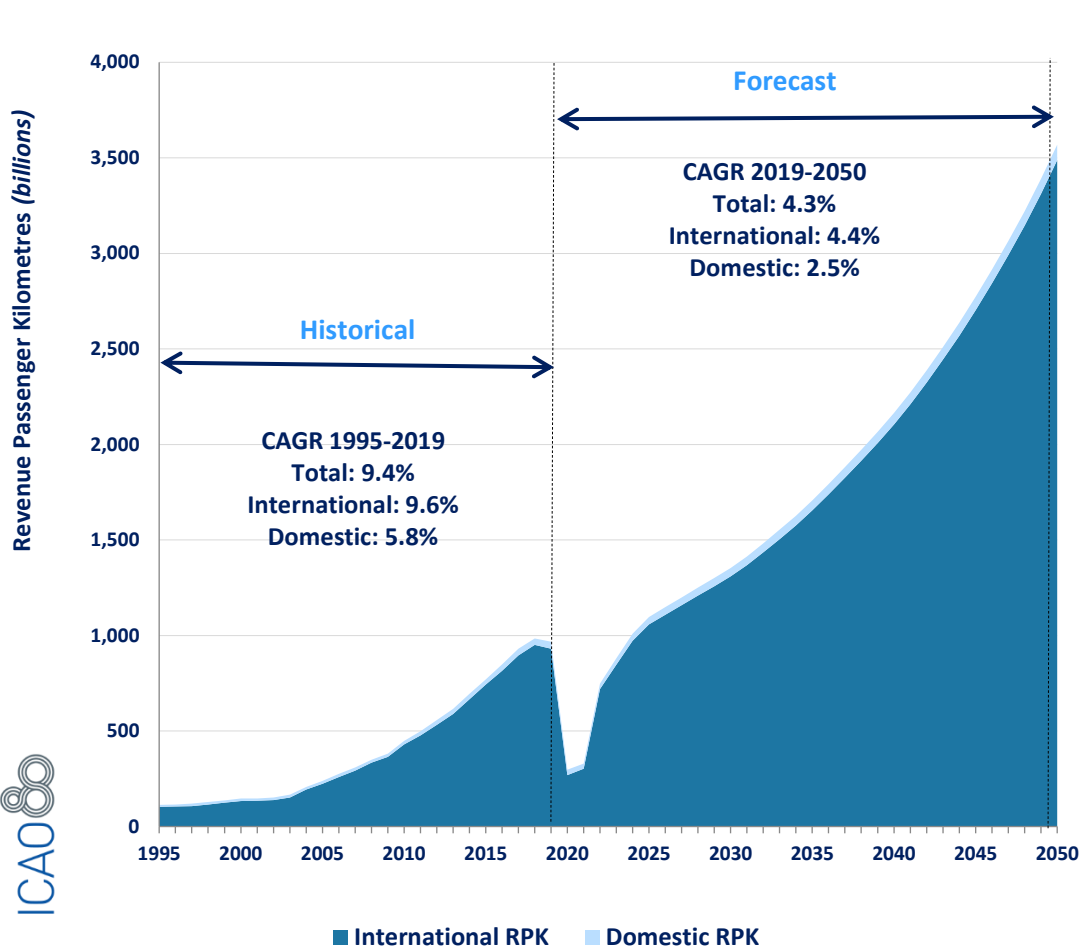
Top10 International Route-Groups by RPK (billions)



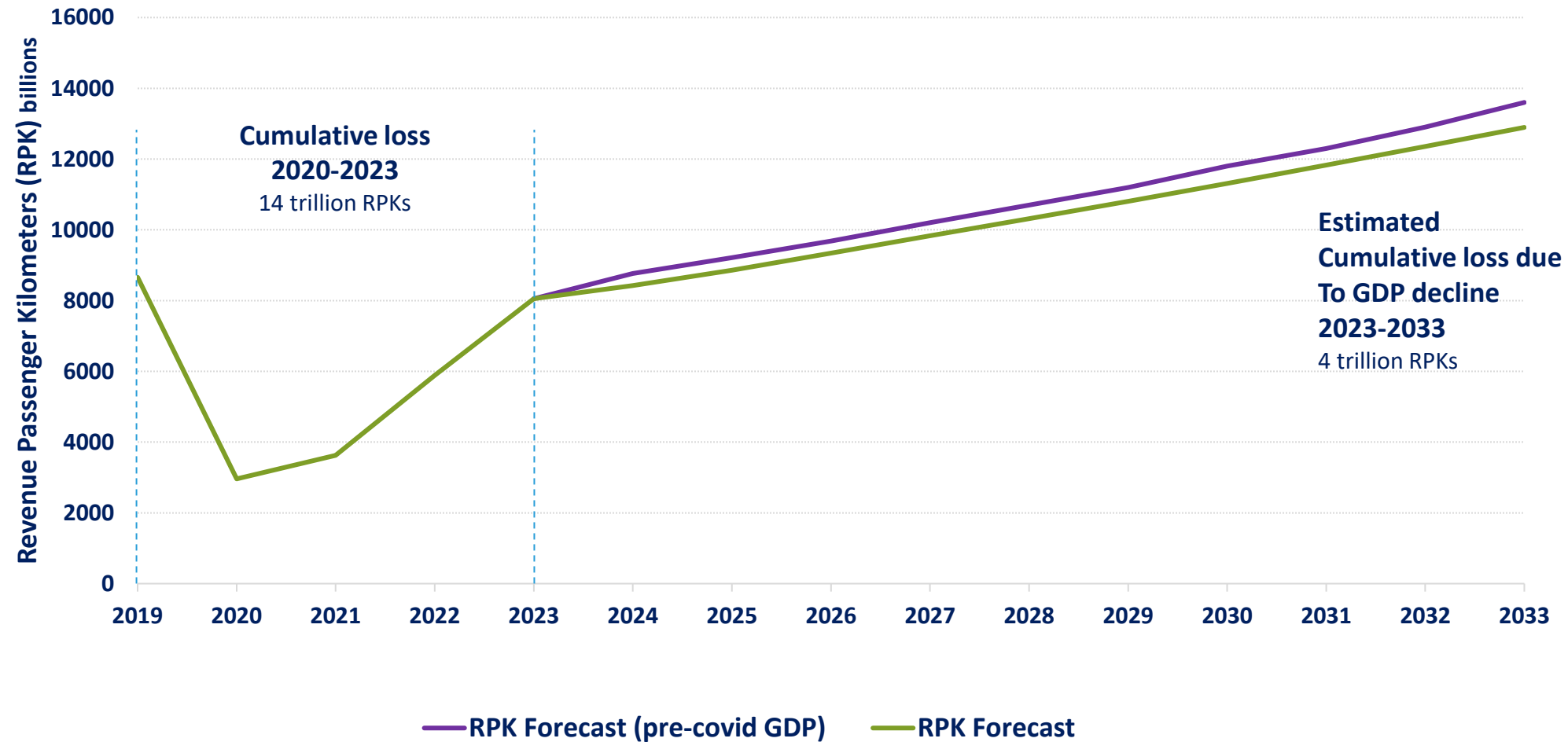
■ 2050 ■ 2039 ■ 2019

■ 2019-2050 ■ 2019-2039 ■ 1995-2019

ICAO LTF Passenger Forecasts Middle East

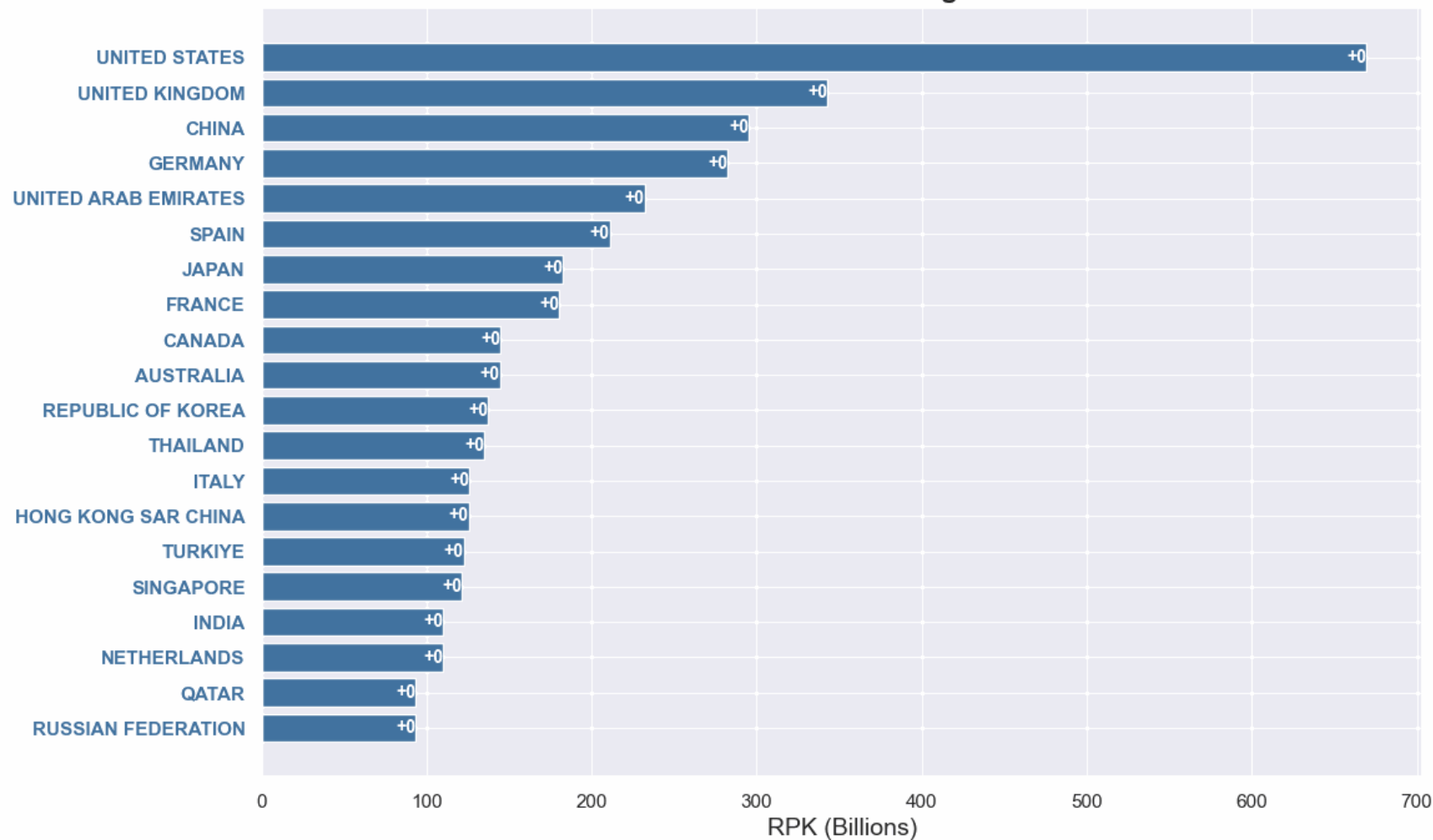


GDP decline impact on Traffic



Country Forecasts (RPK, International)

International RPK Rankings in 2019



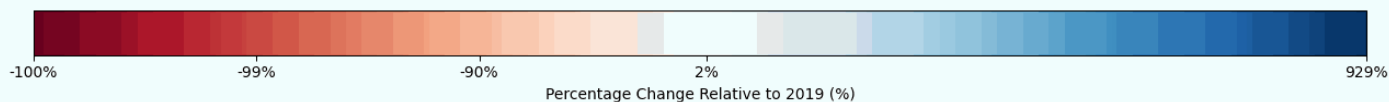
Country	Rank 2043	Rank 2019
UNITED STATES	1	1
CHINA	2	3
INDIA	3	17
UNITED KINGDOM	4	2
UNITED ARAB EMIRATES	5	5
GERMANY	6	4
THAILAND	7	12
SPAIN	8	6
AUSTRALIA	9	10
SINGAPORE	10	16
FRANCE	11	8
JAPAN	12	7
CANADA	13	9
TURKIYE	14	15
VIETNAM	15	22
INDONESIA	16	26
REPUBLIC OF KOREA	17	11
HONG KONG SAR CHINA	18	14
QATAR	19	19
MALAYSIA	20	23

Global Passenger Traffic Growth (RPK, International)

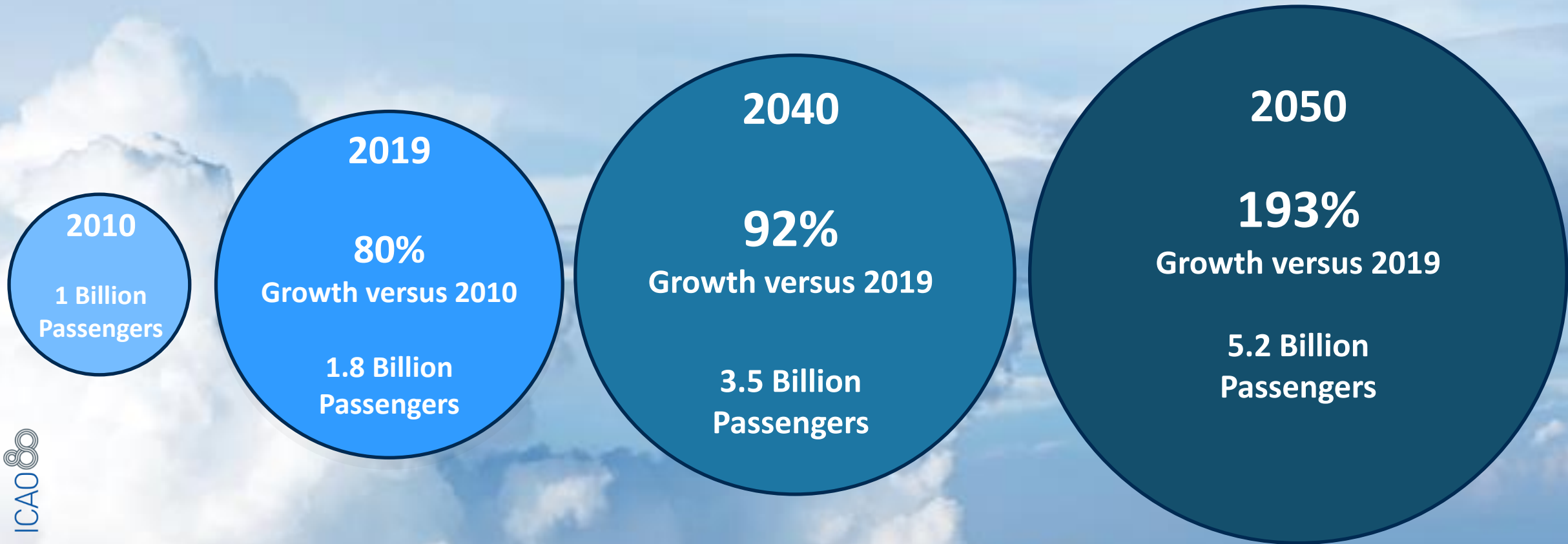
Percentage Change in Passengers Relative to 2019 - 2019



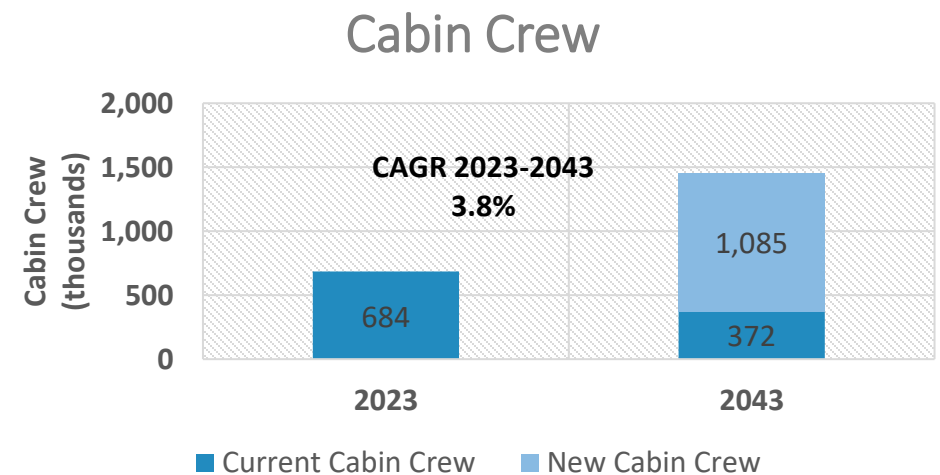
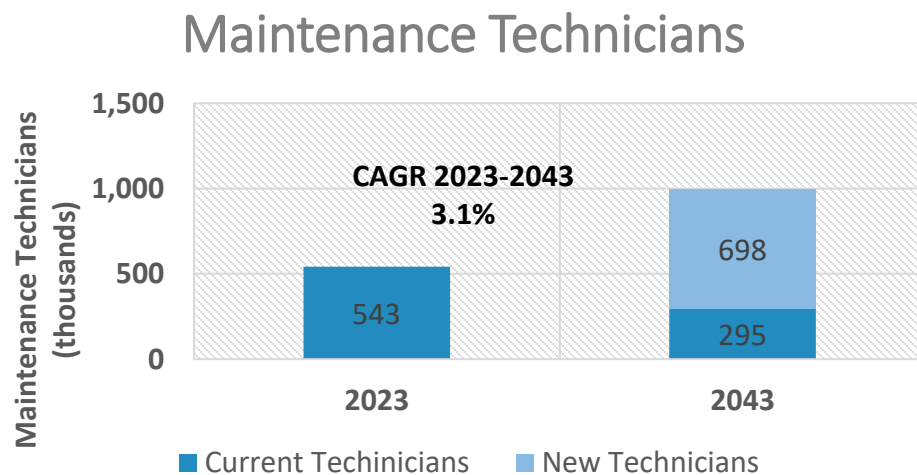
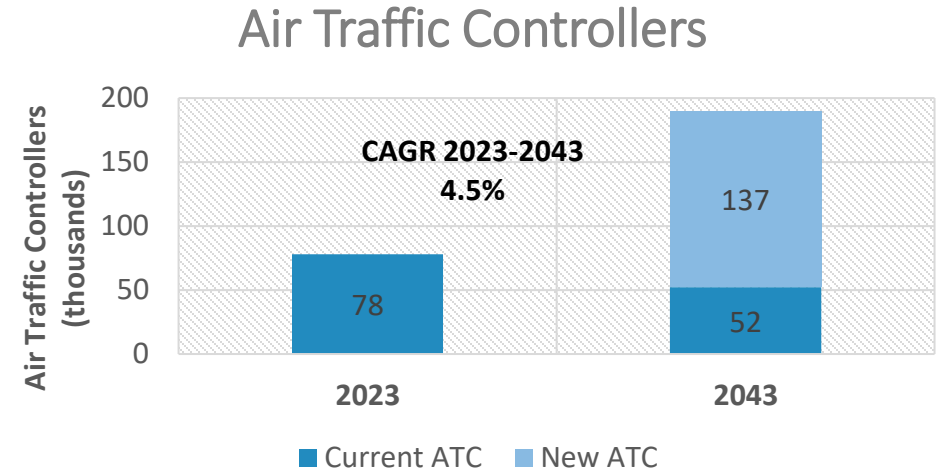
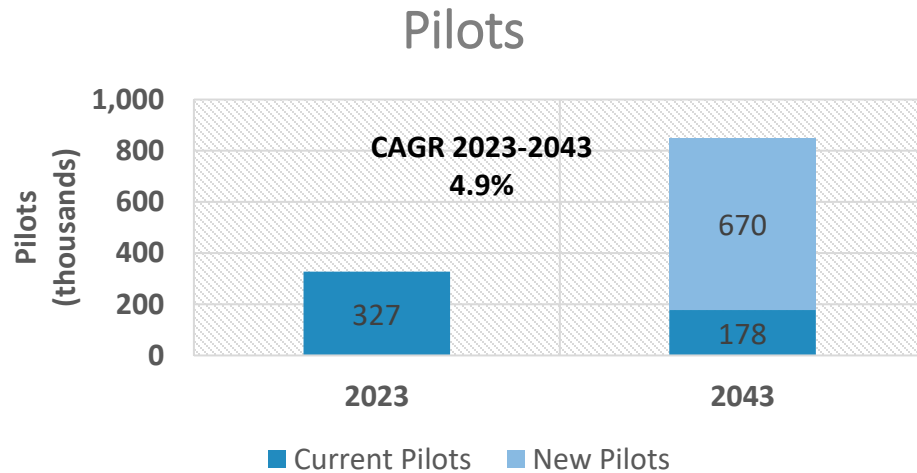
All countries are expected to see passenger's traffic growing



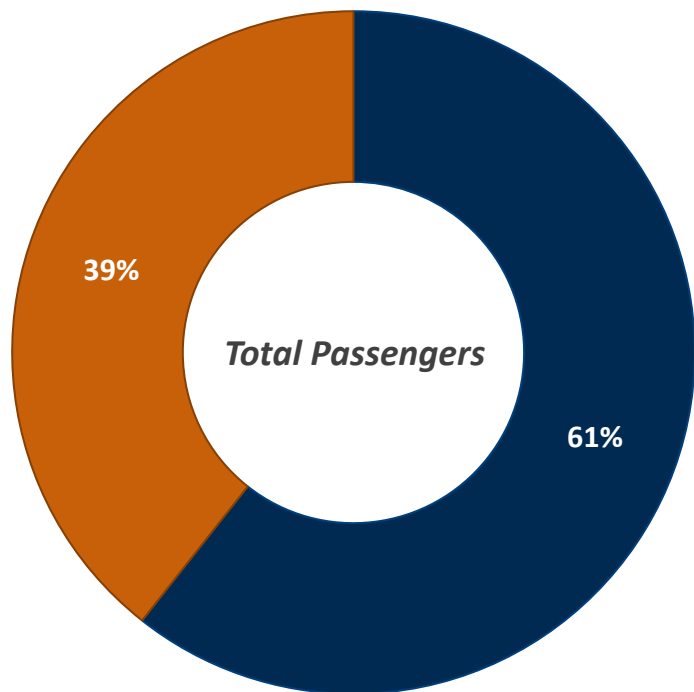
Global International Passenger Growth



Licensed Personnel and Cabin Crew requirements



Global Passengers 2023



■ Domestic ■ International

4.2 Billions

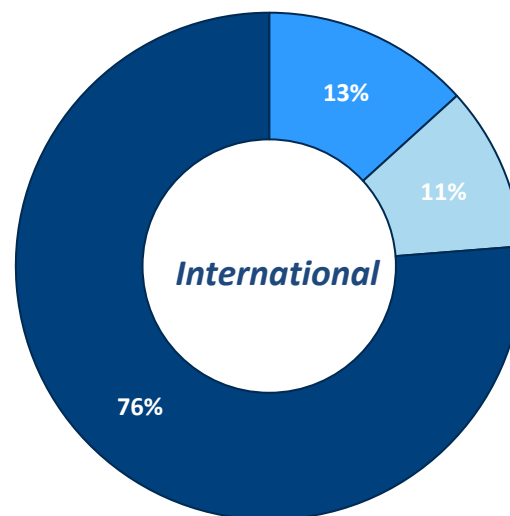
Total Traffic

2.6 Billions

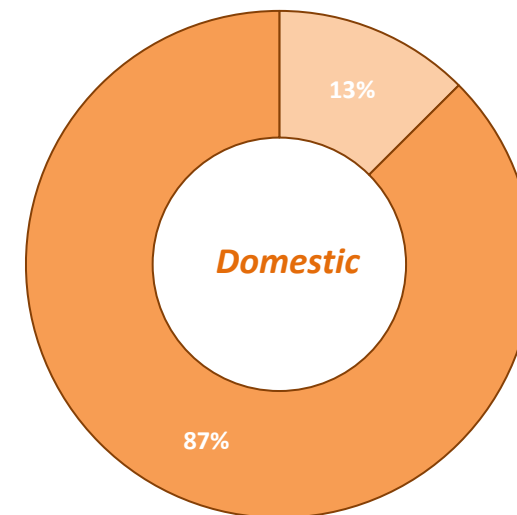
Total Domestic Traffic

1.6 Billions

Total International Traffic

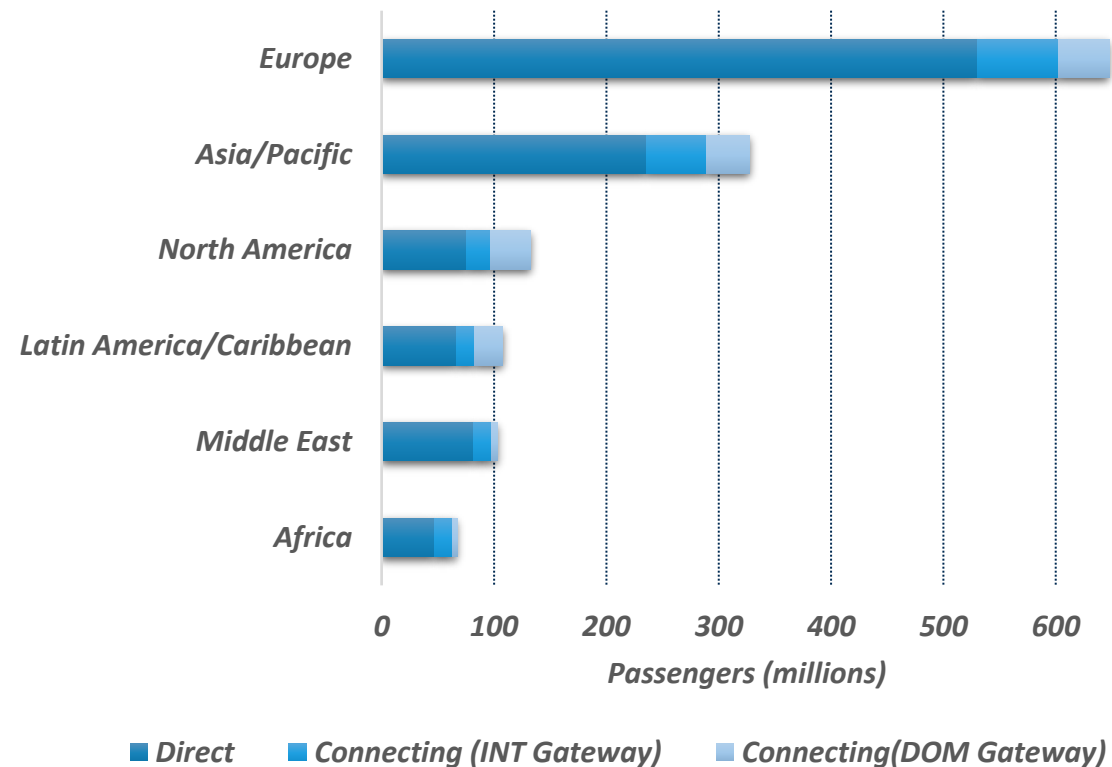
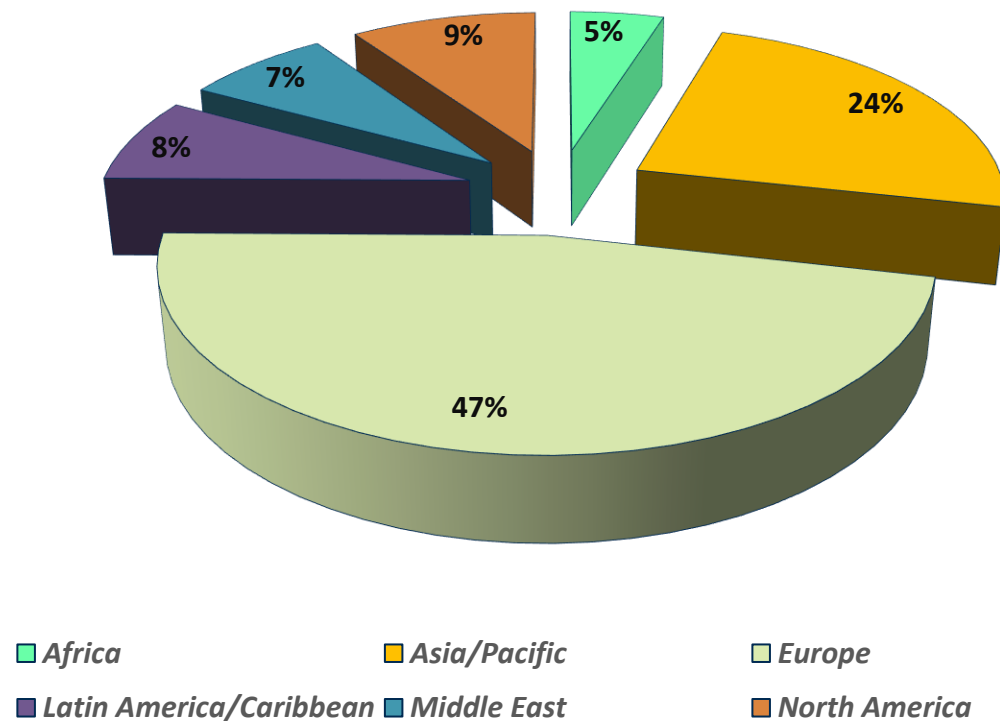


■ Connecting (INT Gateway)
 ■ Connecting (DOM Gateway)
 ■ Direct



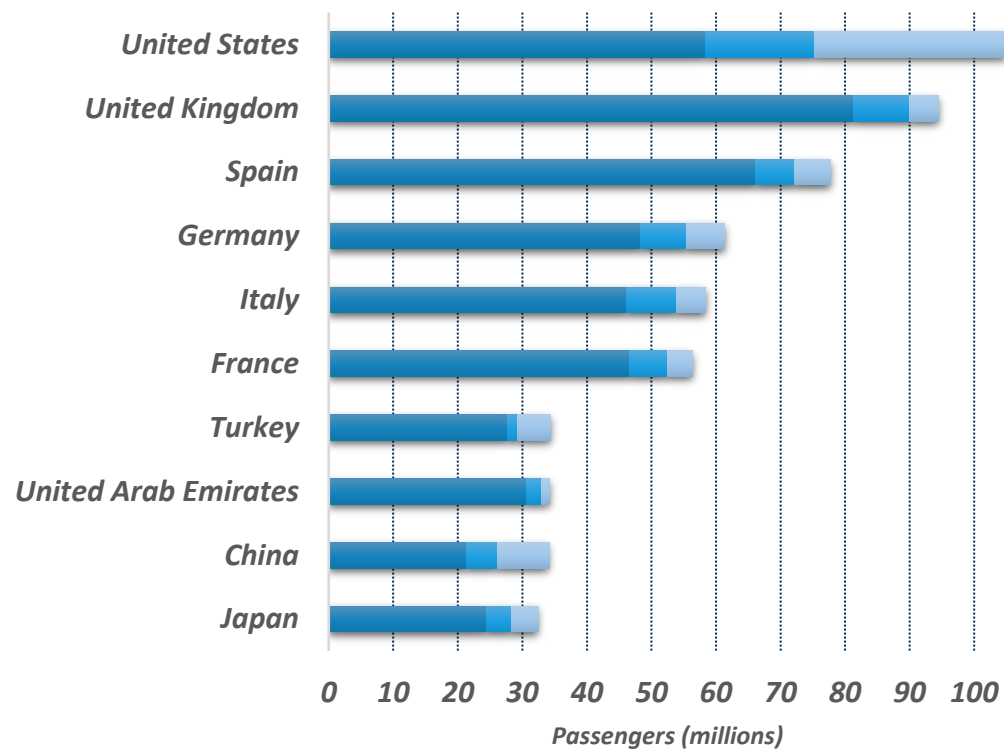
■ Connecting ■ Direct

International Traffic by True Origin Region 2023



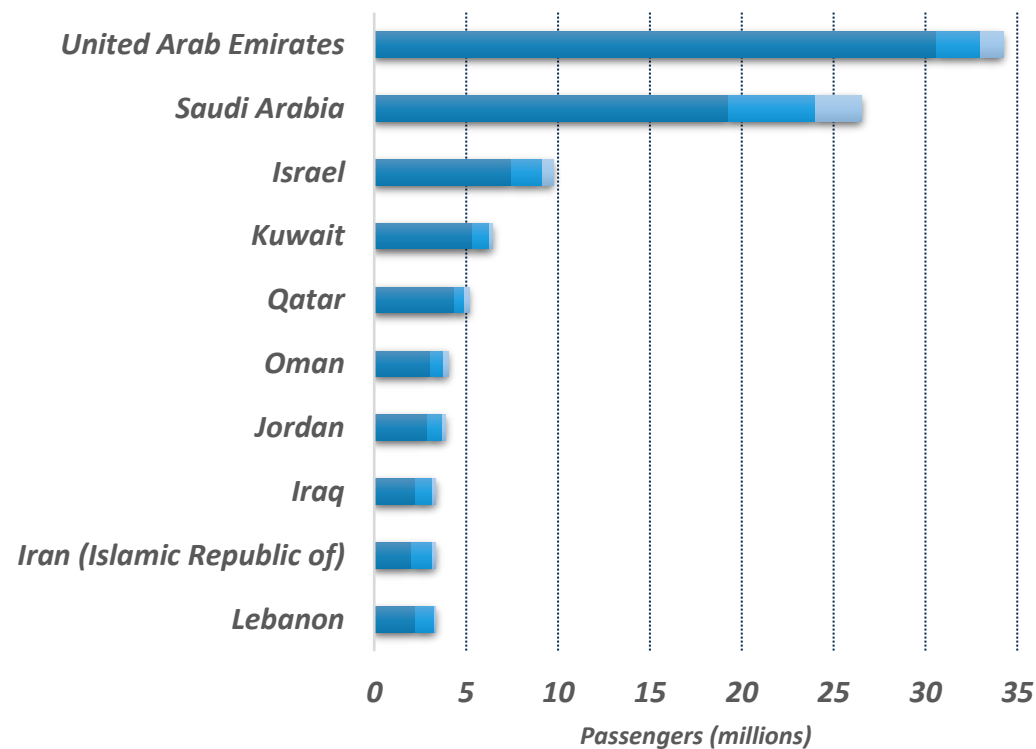
International Traffic by True Origin Country

Global Origins



■ Direct ■ Connecting (INT Gateway) ■ Connecting (DOM Gateway)

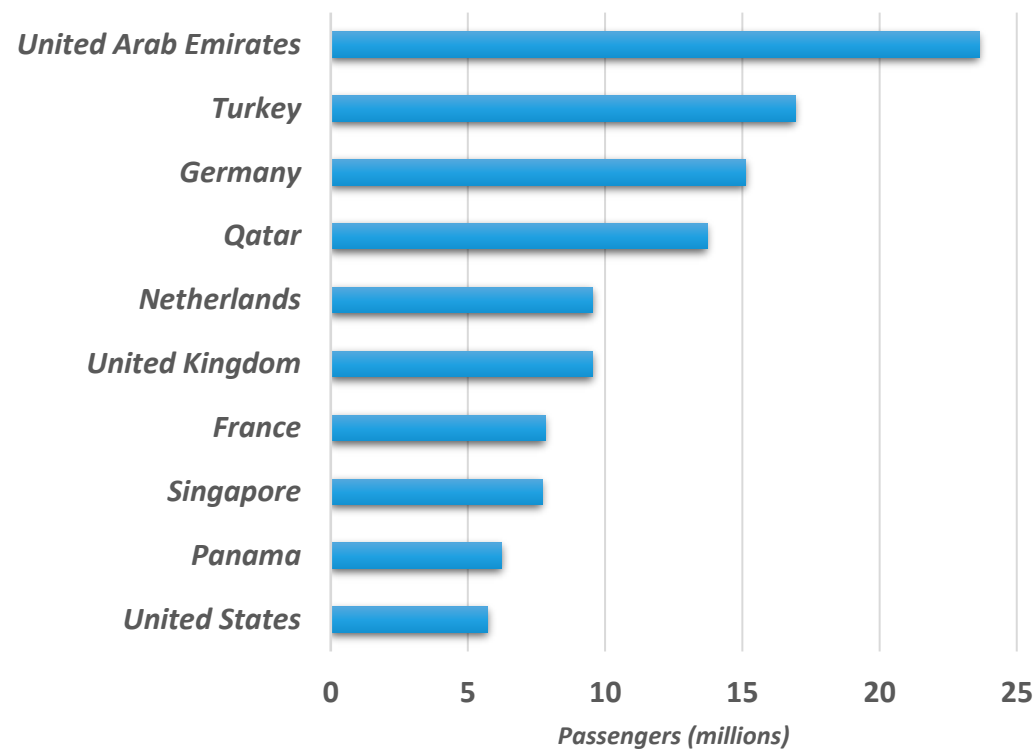
Middle Eastern Origins



■ Direct ■ Connecting (INT Gateway) ■ Connecting (DOM Gateway)

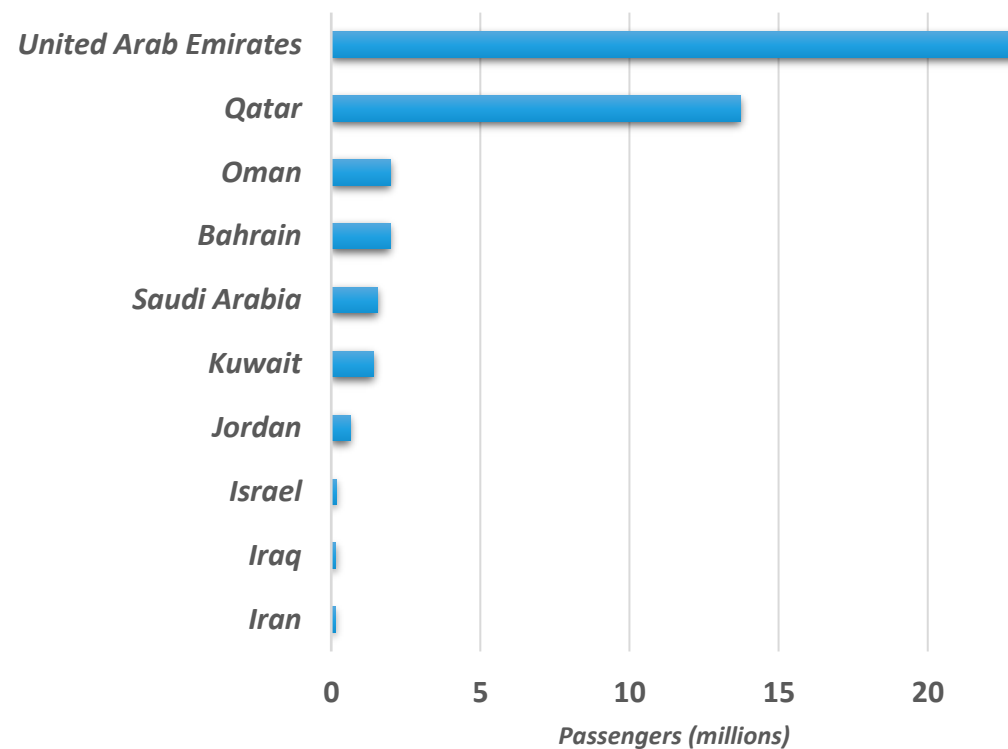
International Traffic by Hub Country

Global Hubs



■ Connecting (INT Gateway)

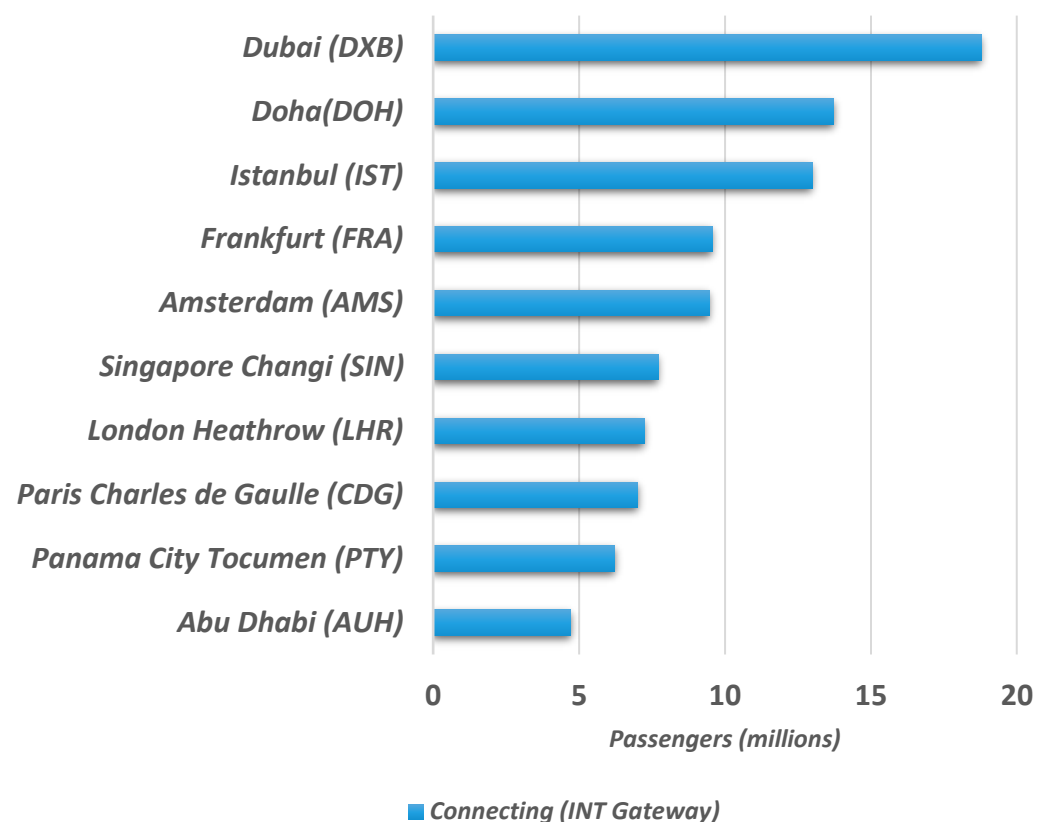
Middle Eastern Hubs



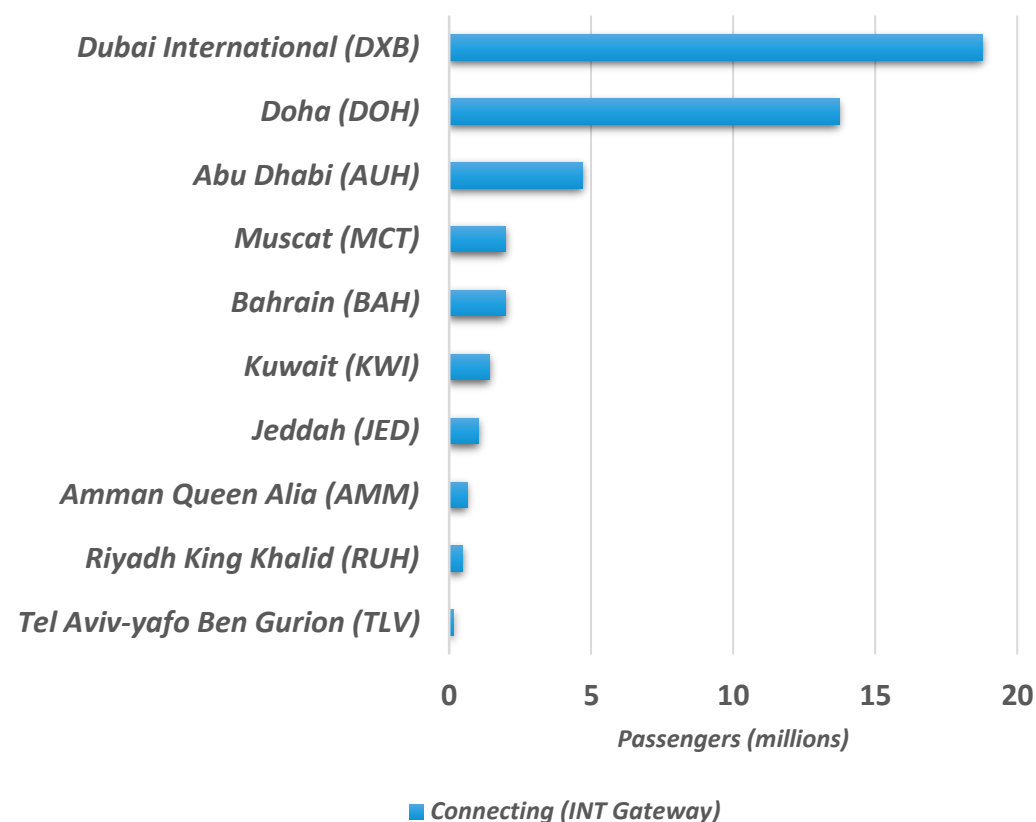
■ Connecting (INT Gateway)

International Traffic by Hub Airport

Global Hubs



Middle Eastern Hubs



Conclusion

- **Strong Growth with Diverse Routes:** The industry has demonstrated strong growth, with routes that experienced growth significantly outpacing those that lagged.
- **Increased Productivity:** Yields outpacing unit costs leading to higher productivity gains, this trend could accelerate with increasing adaptation of Artificial intelligence and other technologies.
- **Decreased Price Sensitivity:** Indicators show a decrease in price sensitivity, suggesting potential shifts in market dynamics and business models.
- **Anticipated Shifts in Demand:** the coming decade will see significant shifts in air traffic demand and infrastructure needs in Member States
- **Decade of Sustainable and Resilient Growth:** Despite challenges, the coming decade is anticipated to be characterized by sustainable and resilient growth, marking a strong recovery post-pandemic.

Thank You

