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# RECONNECTING THE WORLD



## Nineteenth Meeting of the Middle East Air Navigation Planning and Implementation Regional Group (MIDANPIRG/20)

### MID Region state of Air Transport

Muscat, Oman, 14-18 May 2023





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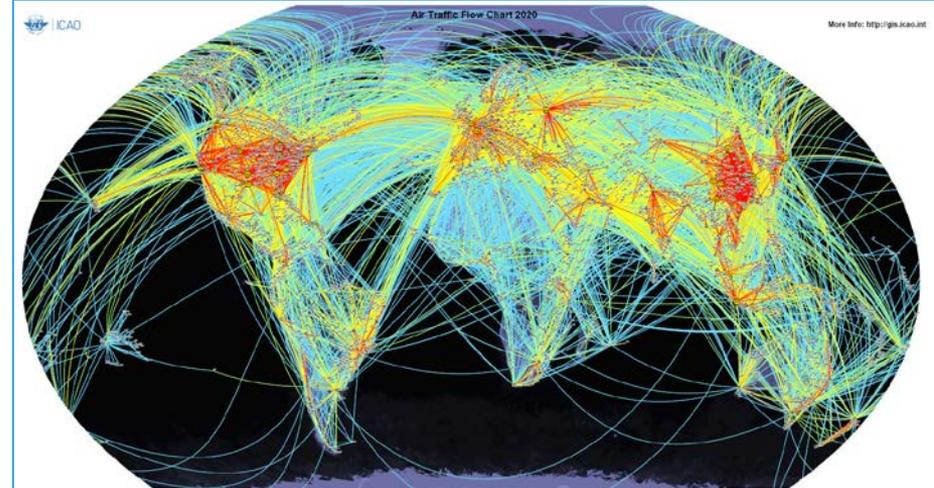
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## COVID-19 pandemic impacted air connectivity



2019

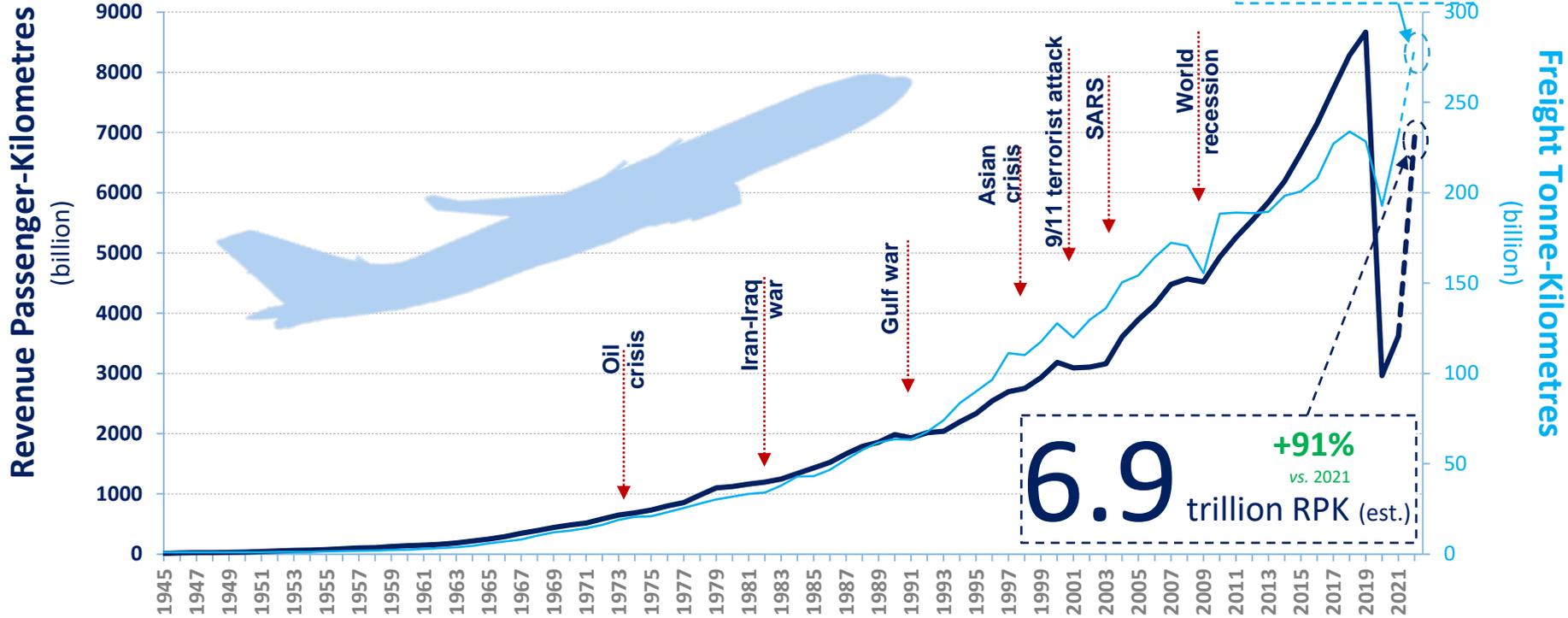


2020



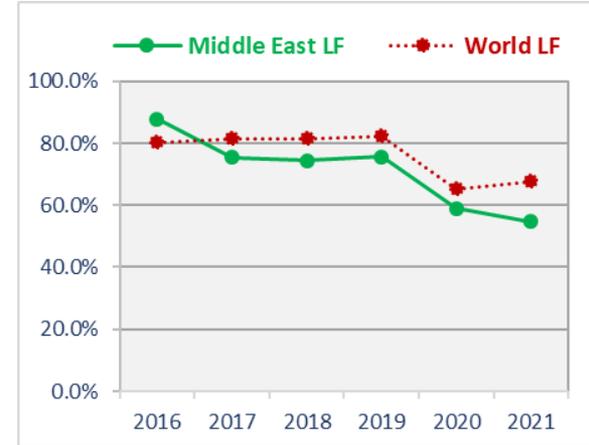
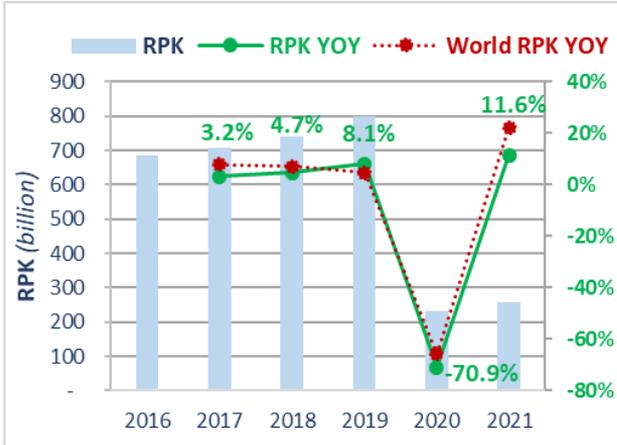
## Global traffic: A recovery from the pandemic shock

**+21%**  
vs. 2021  
**280** billion FTK (est.)





## MID passenger traffic



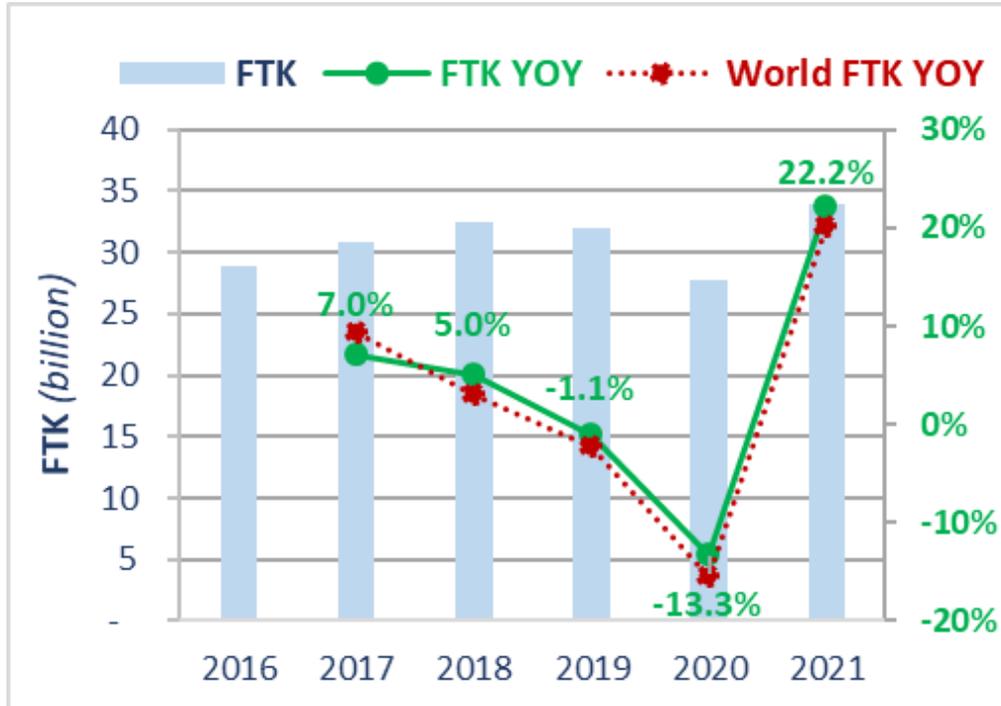
- Passenger traffic in RPKs recovered by 11.6% in 2021 after the declined by -70.9% in 2020.
- Passenger traffic recovers below the world average.

- Seat Capacity in Available Seat-Kilometres (ASKs) recovered by 20.4% in 2021 after the decline by -62.7%.
- Capacity recovers below the world average.

- Passenger load factor declined to 54.6% in 2021, below the world average.
- Passenger load factor is below the world average.



## MID cargo traffic



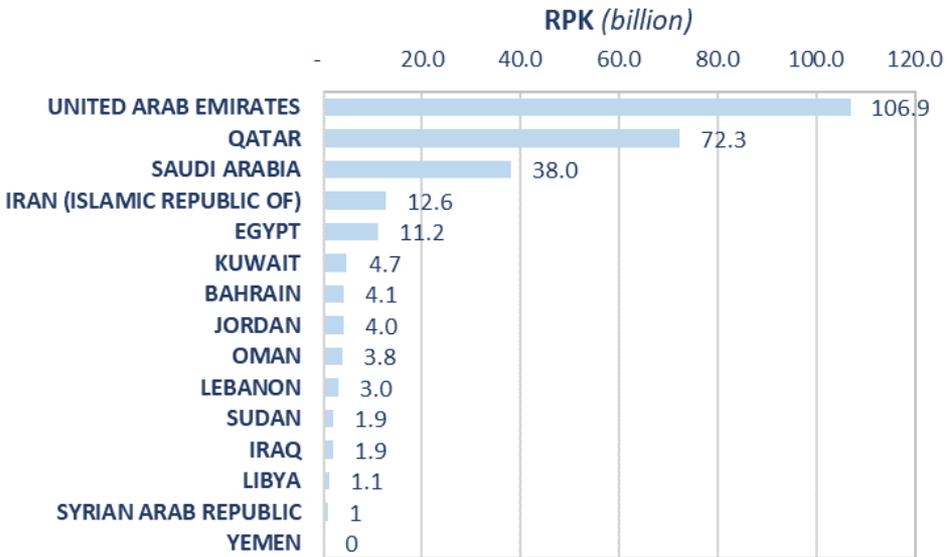
- Cargo traffic measures in Freight Tonnes-Kilometres (FTKs) recovered by 22.2% in 2021, surpassing the 2019 result.
- FTK increased more than world average



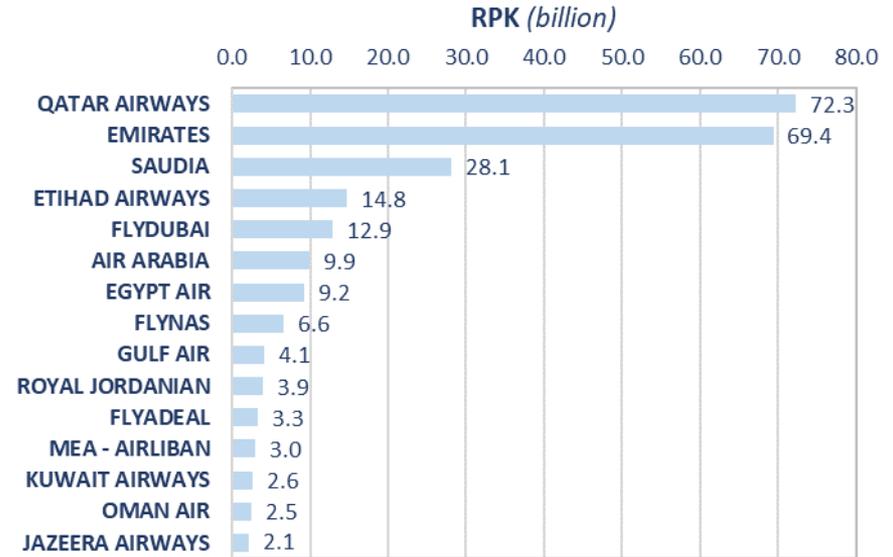
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## State ranking by Revenue Passenger-Kilometres

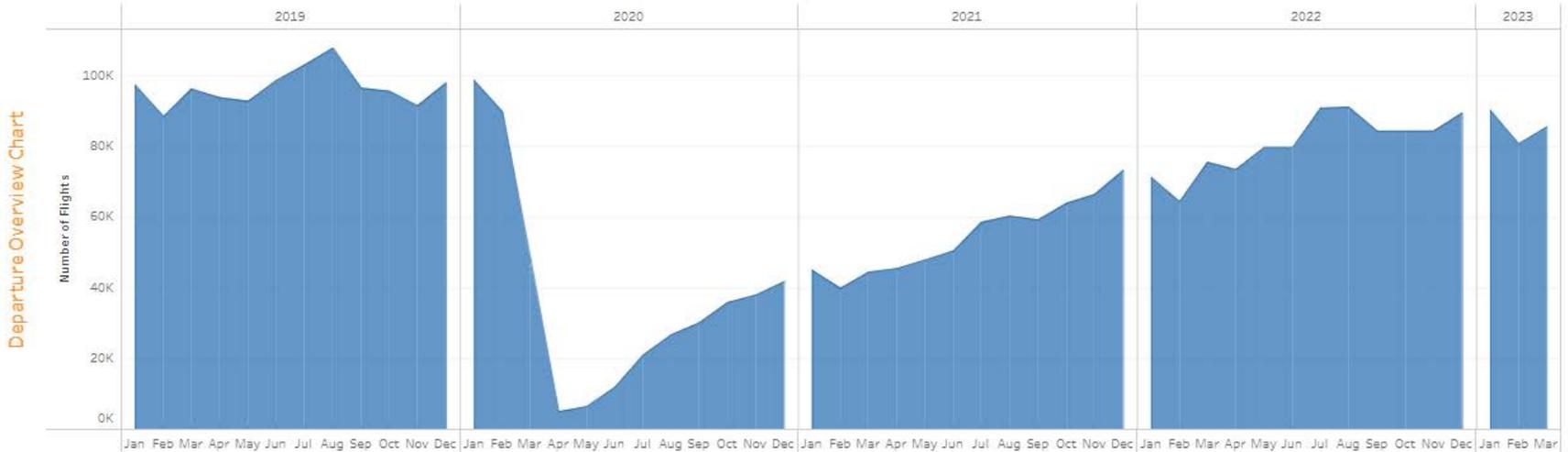


## Airline ranking by Revenue Passenger-Kilometres



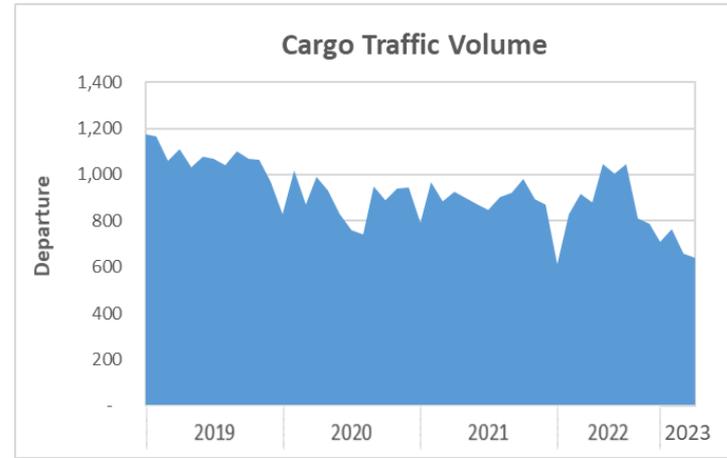
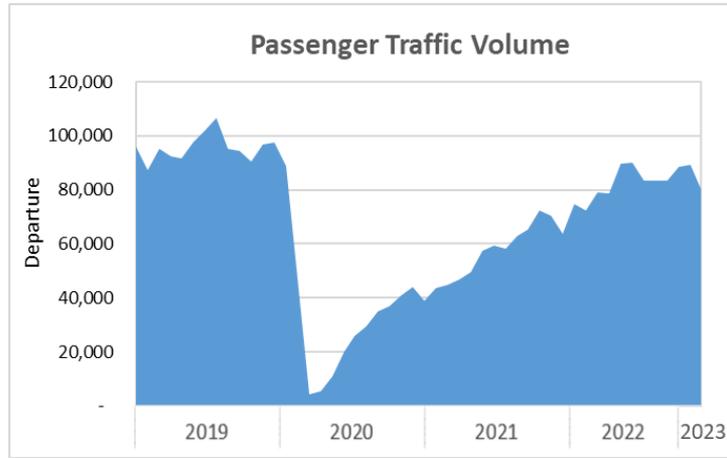


## Total Number of flights from MID States 2019-2023



- **+21% increase in departure from Jan-March 2023 compared to the same period in 2022.**
- **+98% increase in departure from Jan-March 2023 compared to the same period in 2021.**

## Evolution of traffic – Middle East

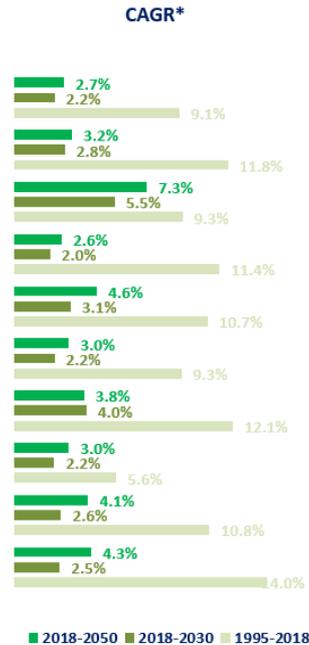
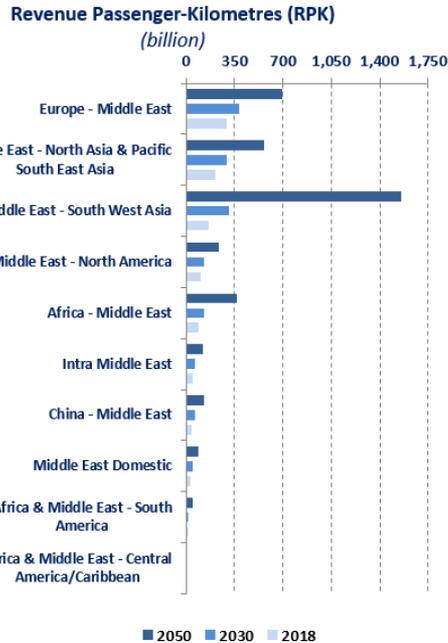


- **Passenger traffic in Middle East region in departure volume shows constant recovery since the pandemic shock in 2020.**
- **Scheduled passenger departure volume in 2022 recovered by 83.6% compared with 2019.**
- **Scheduled cargo departure volume, on the other hand, shows a slight decrease after the pandemic.**

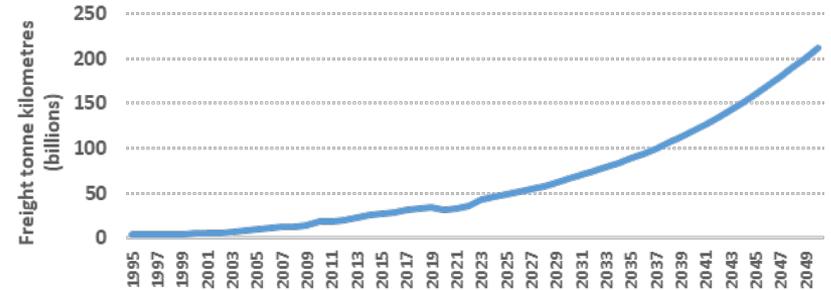


## Long term traffic forecasts - Middle East (2018 baseline)

### Passenger Traffic by route group to/from Middle East



### Cargo forecasts – Middle East



- Passenger traffic (RPK) CAGR 2018-2050 forecast is 4.4%, 3.0% and 4.3% for international, domestic and total, respectively
- Cargo traffic (FTK) CAGR 2018-2050 forecast is 6.0%, 2.3% and 6.0% for international, domestic and total, respectively



## Economic Impact Analysis of COVID-19:

<https://www.icao.int/sustainability/Pages/Economic-Impacts-of-COVID-19.aspx>

## COVID-19 Air Traffic Dashboards:

<https://www.icao.int/sustainability/Pages/COVID-19-Air-Traffic-Dashboard.aspx>

## Regional Personnel by Gender Analysis:

<https://public.tableau.com/app/profile/icaodataanalytics/viz/RegionalPersonnelByGenderAnalysis/PersonnelbyGender/>



Operational impact



Aircraft utilization



Country-pair traffic



Economic impact - Air carriers



ECONOMIC IMPACT - AIRPORTS



ECONOMIC IMPACT - ANSPS



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THANK YOU