

2015 ICAO Air Services Negotiation Event Antalya Turkey 19-23 October

Connectivity, Regulatory Framework and
Economic Development of Air Transport and Tourism



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Economic Affairs

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ICAN2015



50,000+ City pairs

- Who is ACI? Airports Council International is *the* worldwide representative of airports. We are now headquartered in Montreal, Canada with 590 airport members, operating fully 1,850 airports in 173 countries, representing 95% of the world's passenger traffic.
- ACI consists of a World office—formerly in Geneva, now in Montreal—and five Regions: Africa; Asia-Pacific, which includes the Middle East; Europe; Latin America-Caribbean; and North America. *Our common location with ICAO and IATA provides important and frequent opportunities to cooperate and advance initiatives on behalf of the larger industry.*
- Initiatives such as APEX (Airport Excellence in Safety) and ASQ (Airport Service Quality) provide industry-leading services to airports worldwide

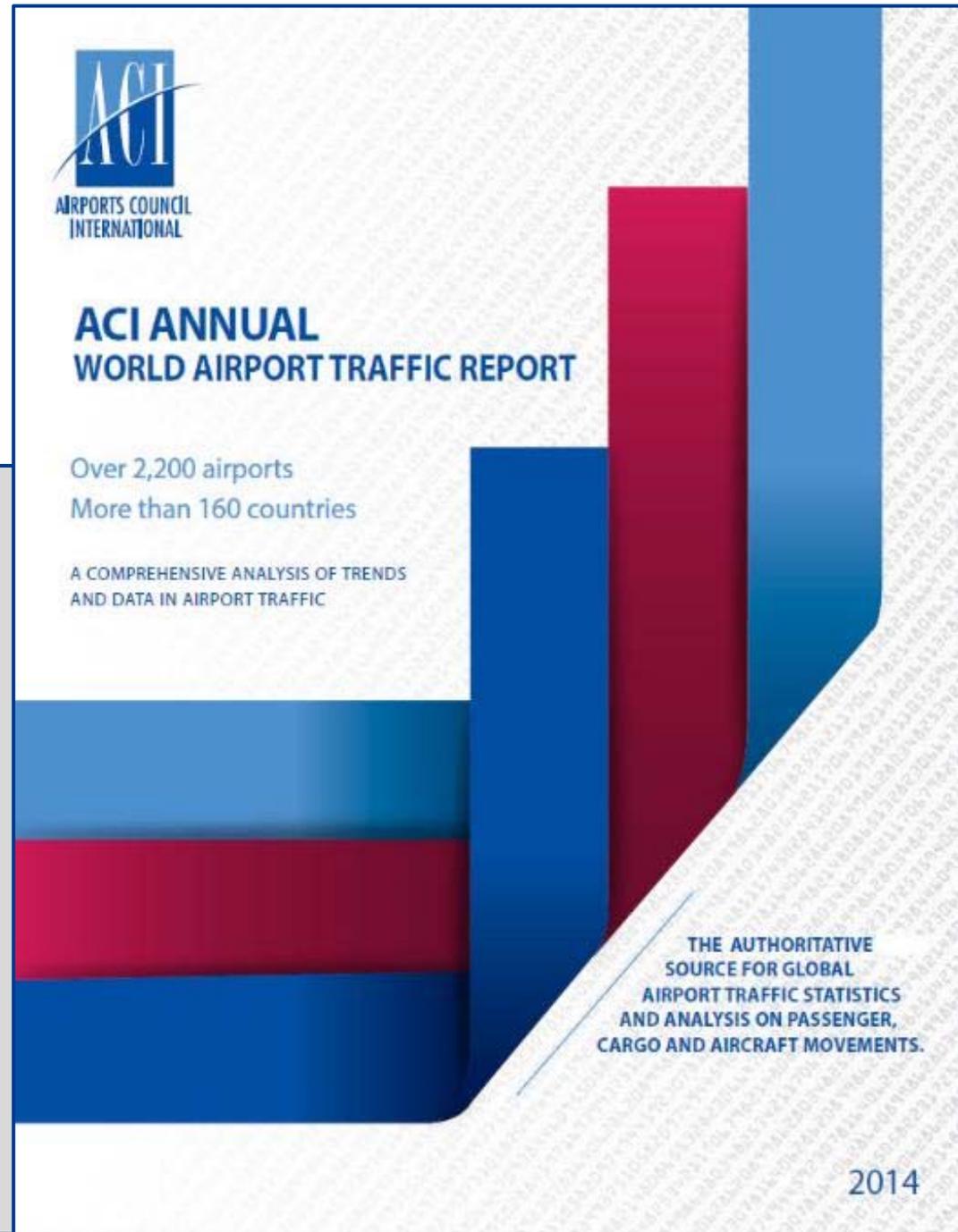


Traffic & Connectivity

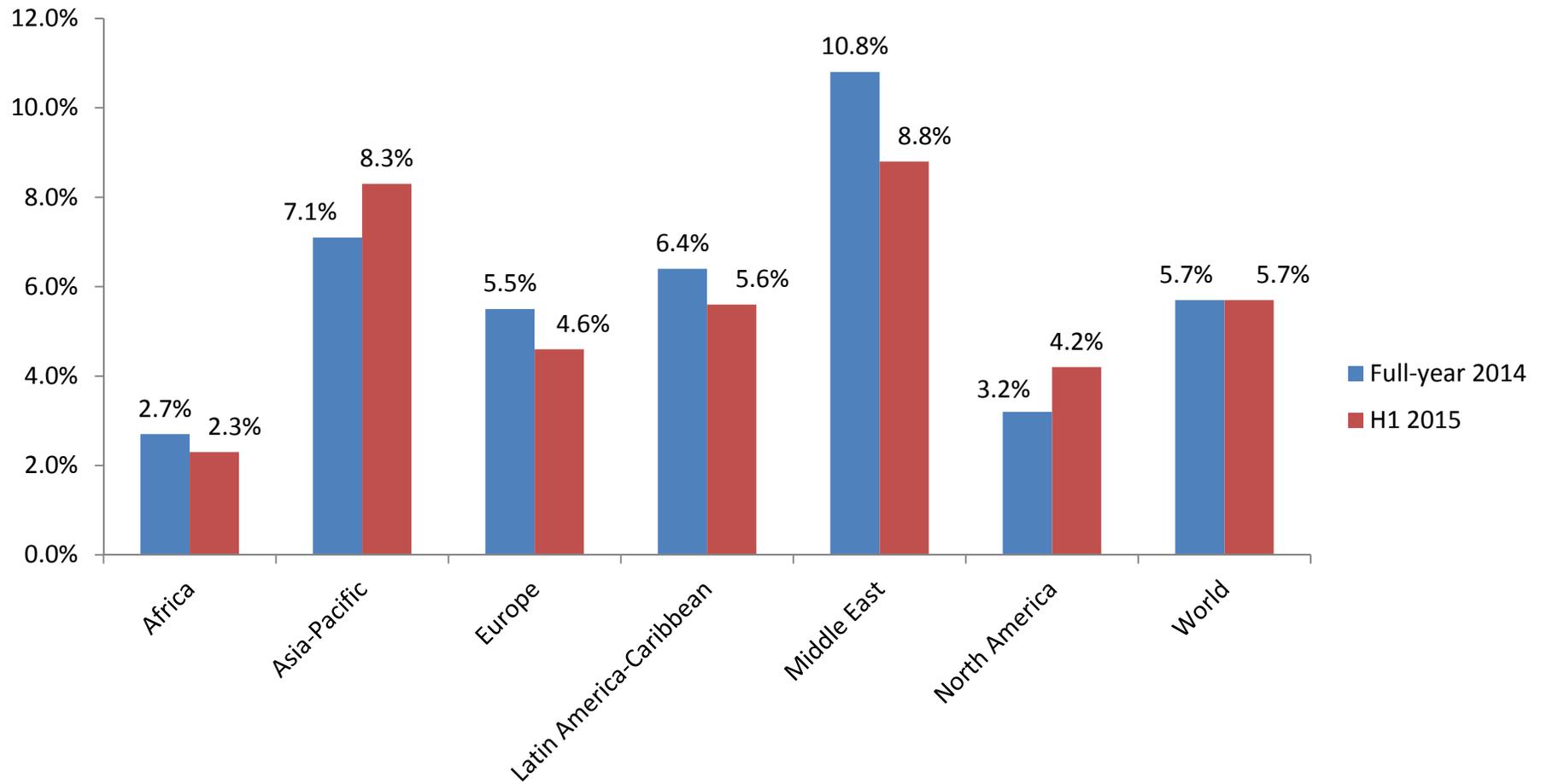
2,200 Airports

160+ Countries

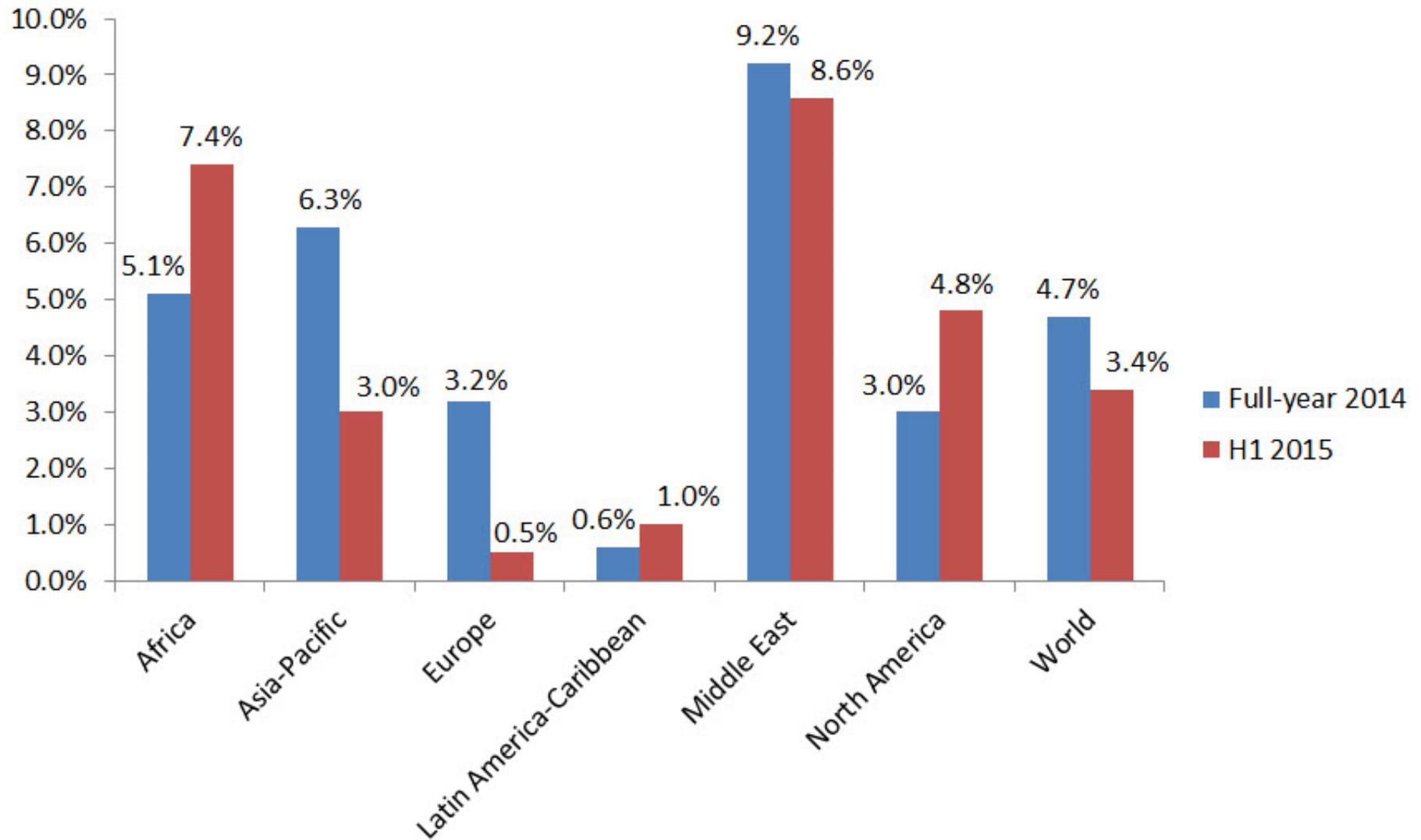
Passengers, Cargo
& Movements



Passenger traffic by region (FY 2014 vs. H1 2015)



Cargo traffic by region (FY 2014 vs. H1 2015)



Economics

650 Airports

70% of Passenger Traffic

ACI
AIRPORTS COUNCIL
INTERNATIONAL

2014 ACI Airport Economics Report

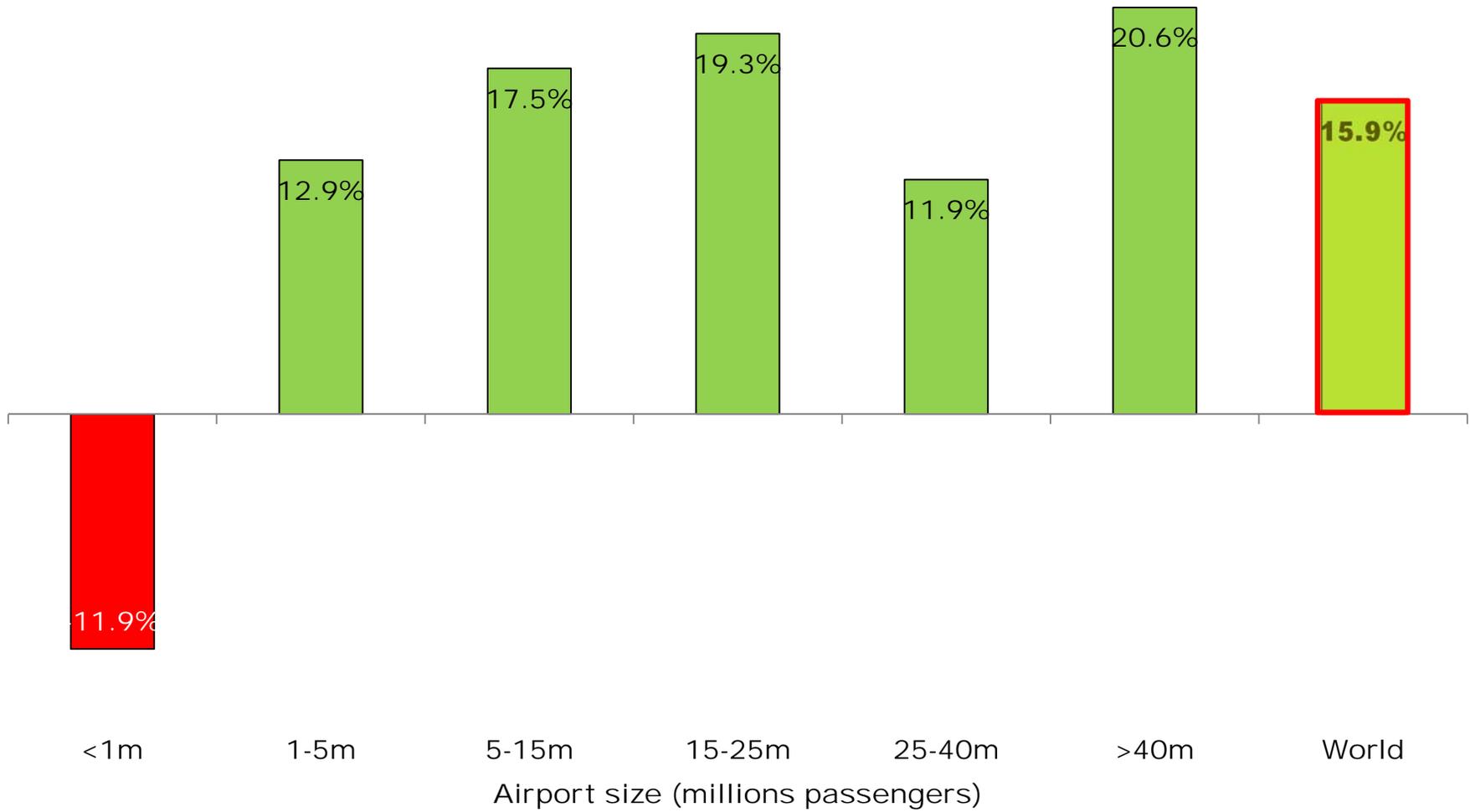
Global indicators and analyses for over 650 airports, representing 70% of the world's passenger traffic

Relevant statistics. Superior decision-making. Better airports.
A COMPREHENSIVE VIEW OF THE INDUSTRY'S 2013/2014 FINANCIAL PERFORMANCE

ESTIMATED INDUSTRY REVENUES (MILLIONS US\$)

	Total revenue	2013/2012 % change	Aeronautical revenue*	2013/2012 % change	Non-aeronautical revenue**	2013/2012 % change
Africa	2,900	3.9%	2,100	11.3%	800	-6.8%
Asia-Pacific	37,000	11.8%	18,800	12.9%	18,200	10.7%
Europe	49,800	2.3%	30,100	6.1%	19,700	-3.2%
Latin America-Caribbean	7,000	6.8%	4,400	5.5%	2,600	9.3%
Middle East	8,700	11.6%	4,400	5.7%	4,300	18.4%
North America	25,500	4.4%	13,900	0.6%	11,600	9.6%
World	130,900	5.4%	73,700	5.9%	57,200	4.9%

NET PROFIT MARGINS (2013)



Three thoughts related to connectivity, regulation and economic development:

1. We should continue to build on successful efforts where we clearly share common purpose (security, facilitation, A-CDM)
2. We should tackle the issues that challenge us collectively (GHGs/climate, competition, remote airports)
3. We should find new ways of addressing old division (liberalization/Open Skies, airport regulation)



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Economic Oversight
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2–4 December 2015

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