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# Second ICAO Meeting on Air Cargo Development in Africa

## Session 1

Briefing on the 39<sup>th</sup> Session of the ICAO Assembly & Global Challenges for Air Cargo

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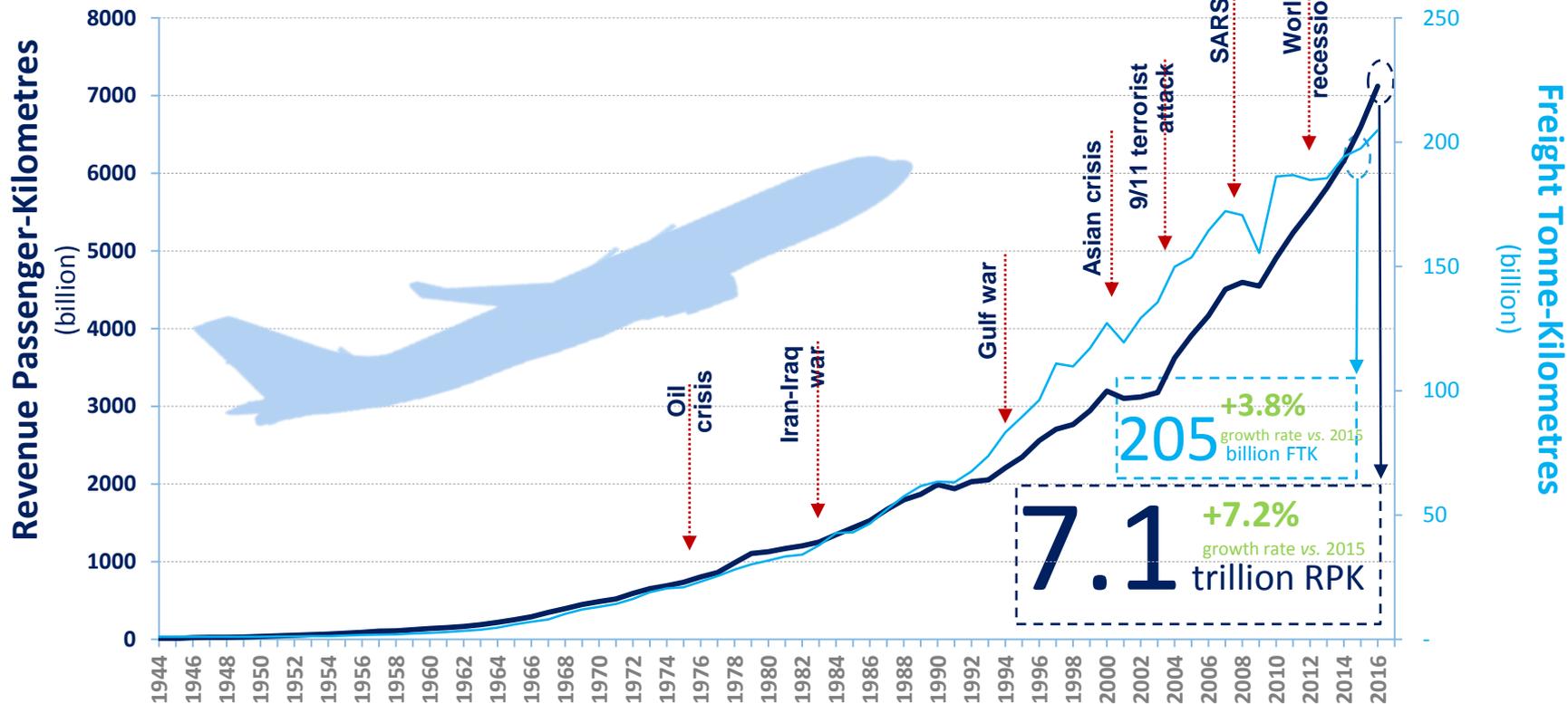
**Value of Aviation**

**A39 Outcomes**

**Sustainable Development Agenda**



# Growth of air transport





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## The size of the industry 2016

- 3.8 billion passengers
- 35 million aircraft departures
- 53 million tonnes of freight
- Over 1 400 scheduled airlines
- More than 27 000 aircraft
- More than 4 130 airports
- 173 air navigation centres

Traffic is for scheduled services



# Air route network 2015





## Direct economic contribution of the aviation sector

10.5 million

**Direct jobs** supported by aviation worldwide

\$718 billion

**Direct** Global economic impact

## Direct, indirect, induced and tourism economic contribution of the aviation sector

67.3 million

**Jobs** supported by aviation worldwide

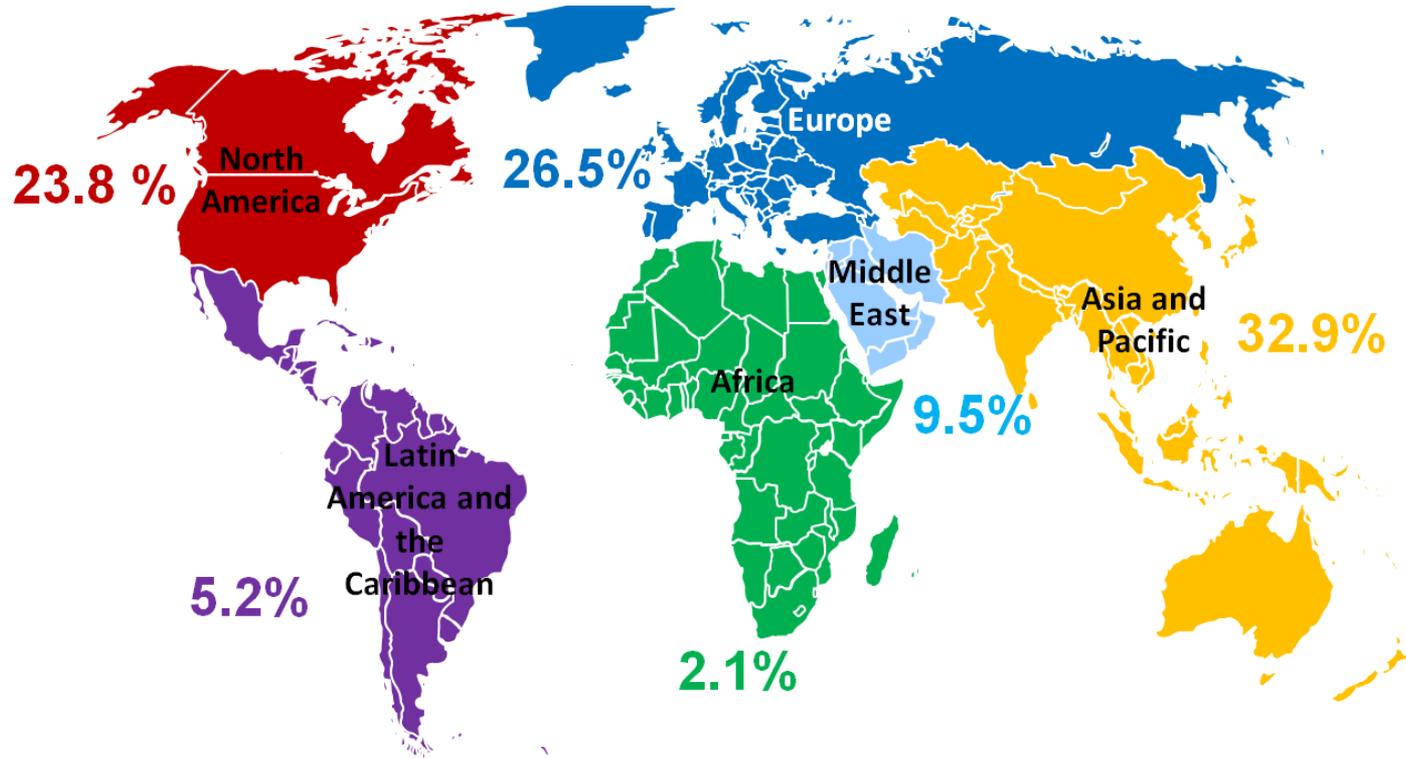
\$2.7 trillion

Global economic impact

In collaboration with the United Nations, States and international organizations, ICAO is developing a universally-accepted methodology to measure aviation's gross domestic product (GDP) relative to overall economic activity, to better showcase the economic benefits of aviation to the public.

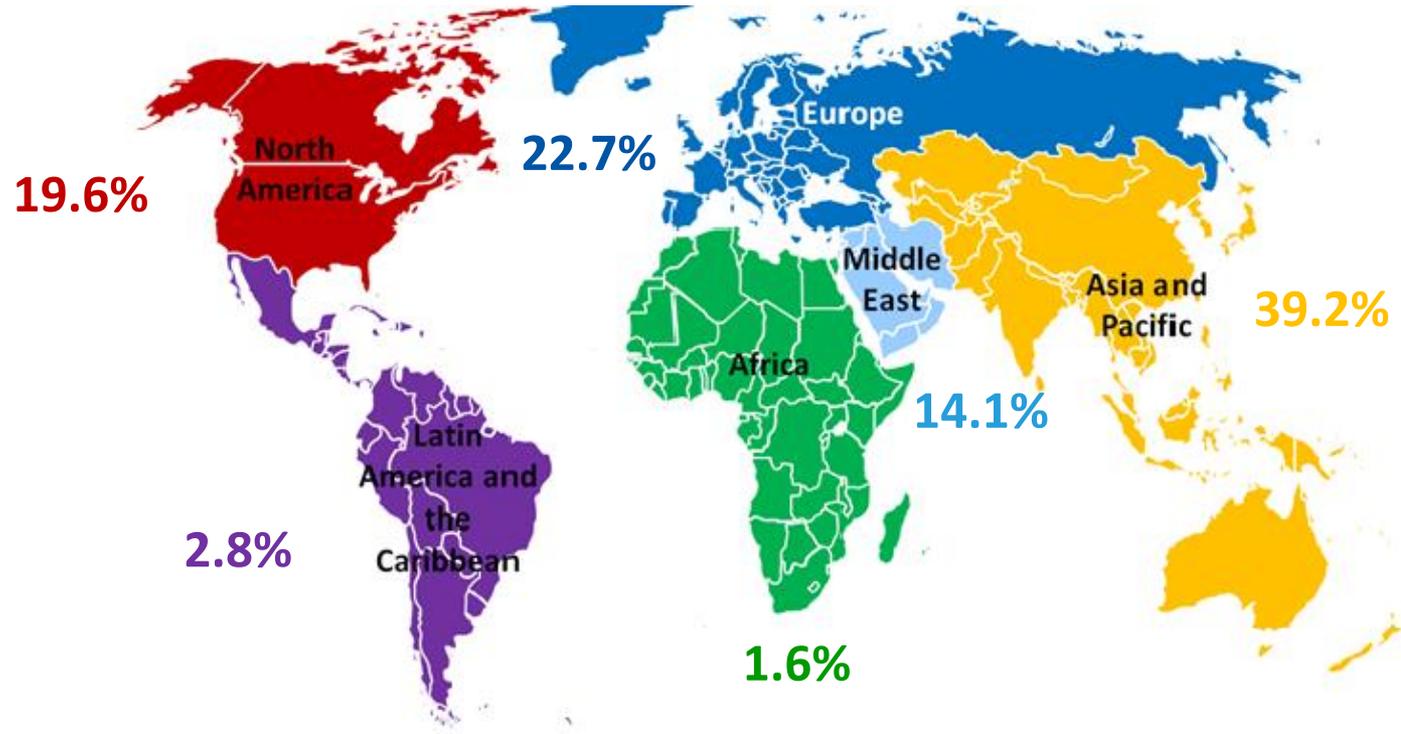


# Share of Revenue Passenger-Kilometres by region in 2016





# Share of Freight Tonne-Kilometres by region in 2016

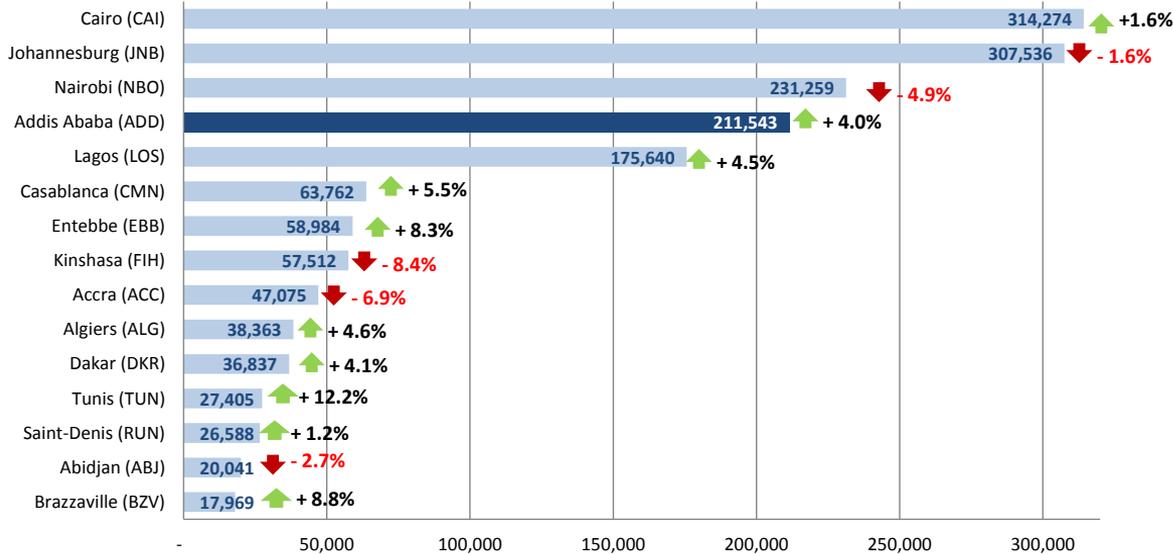




# Ranking of African Airports Total Freight Traffic, 2016

## Total freight traffic, 2016

in tonnes



In 2016:

- The total freight moved in worldwide airports grew up: **3.7%**
- The total freight moved through the African airports reached **1.8** million tonnes.

The region continues to grow:

- ↑ +0.1% in all-cargo and mail movements
- ↑ +0.2% in total freight traffic
- ↑ +7.1% in total mail

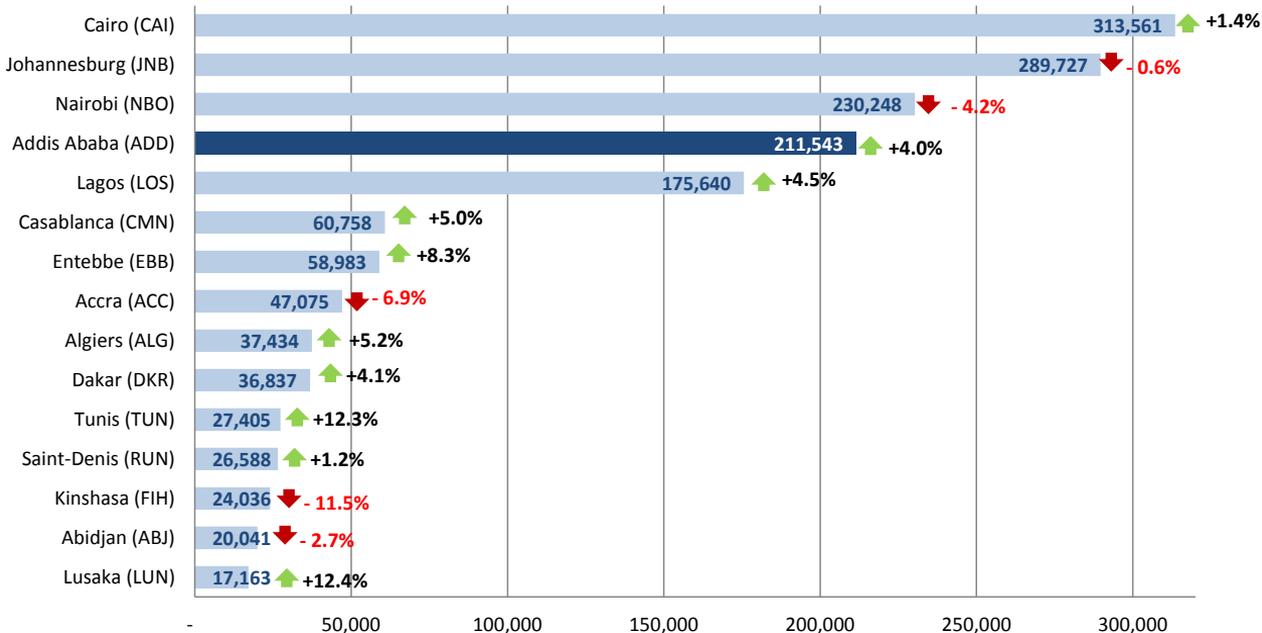
The top 15 African airports:

- ↓ -1.0% in all-cargo and mail movements
- ↑ +0.6% in total freight traffic
- ↑ +8.2% in total mail

- ✓ ADD focus the **11%** of the total freight in Africa
- ✓ The share of the top 15 airports in Africa total freight is **89%**
- ✓ The share of top 15 airports in world total freight is **1.7%**
- ✓ For 2016 the ranking welcomes: Maya-Maya, International Airport of Brazzaville

# Ranking of African Airports International Freight Traffic, 2016

International freight traffic, 2016



The region continues to grow:

↑ + 0.4% in international freight traffic

The top 15 African airports:

↑ + 1.1% in international freight traffic

- ✓ ADD focused the **12.1%** of the international freight in Africa
- ✓ The share of international freight in Africa region is **90.4%**
- ✓ The share of top 15 airports in world international freight is **2.4%**
- ✓ For 2016 the ranking welcomes: Lusaka International Airport

In 2016:

- The total freight moved in worldwide airports grew up: **4.4%**
- The total freight moved through the African airports reached **1.7** million tonnes.

## International Scheduled Revenue Tonne-Kilometres (RTK)

Rank	State of AOC	RTK 2015	RTK Share (%)	Cumulative (%)
1	China (1)	70,319,264,613	12.3565%	12.3565%
2	United States	61,944,635,087	10.8849%	23.2415%
3	United Arab Emirates	52,018,798,574	9.1408%	32.3822%
4	United Kingdom	32,040,780,039	5.6302%	38.0124%
5	Germany	30,924,097,384	5.4340%	43.4464%
6	Republic of Korea	21,802,605,943	3.8312%	47.2776%
7	Singapore	18,647,388,313	3.2767%	50.5543%
8	France	18,295,414,100	3.2149%	53.7692%
9	Qatar	17,359,871,880	3.0505%	56.8197%
10	Netherlands	15,732,743,524	2.7646%	59.5842%
11	Turkey	15,618,938,360	2.7446%	62.3288%
12	Japan	15,495,072,148	2.7228%	65.0516%
13	Ireland	13,238,242,781	2.3262%	67.3778%
14	Canada	13,040,382,256	2.2915%	69.6693%
15	Russian Federation	11,635,019,200	2.0445%	71.7138%
16	Australia	9,375,936,670	1.6475%	73.3613%
17	Thailand	9,263,914,735	1.6279%	74.9892%
18	Spain	9,145,732,692	1.6071%	76.5963%
19	Malaysia	8,983,623,373	1.5786%	78.1749%
20	India	6,994,194,840	1.2290%	79.4039%

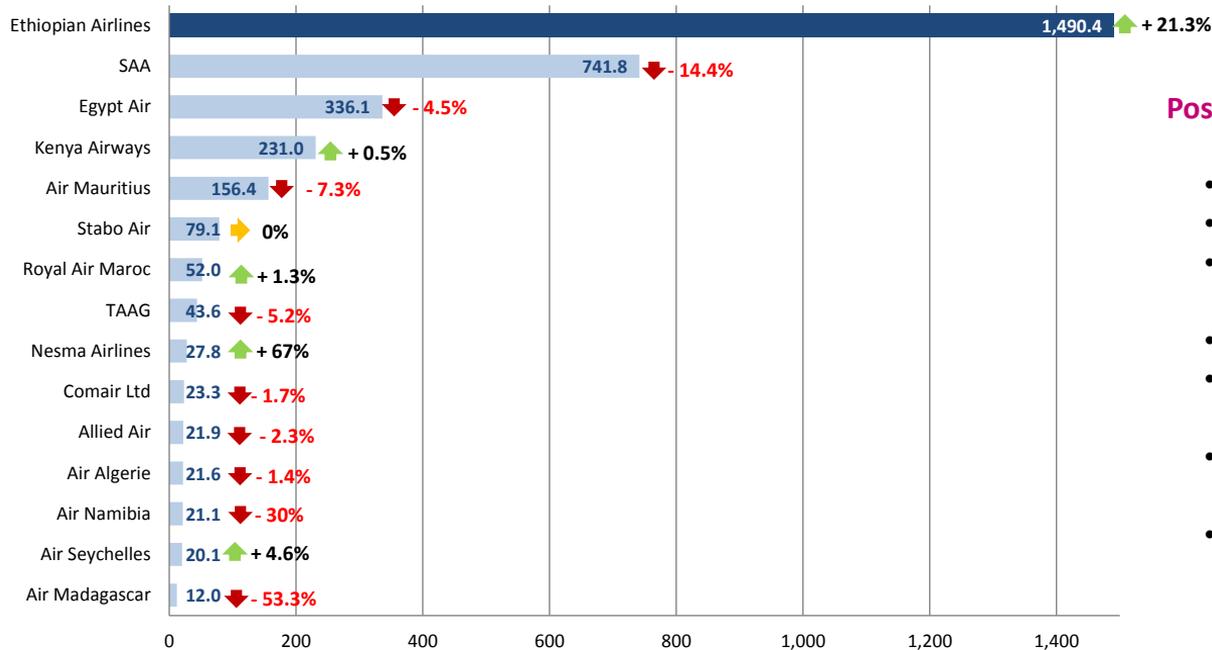
Rank	State of AOC	RTK 2016	RTK Share (%)	Cumulative (%)
1	China (1)	76,648,972,221	12.6858%	12.6858%
2	United States	62,335,143,245	10.3168%	23.0026%
3	United Arab Emirates	55,157,365,092	9.1289%	32.1315%
4	United Kingdom	33,549,700,718	5.5527%	37.6842%
5	Germany	31,833,586,740	5.2686%	42.9528%
6	Republic of Korea	22,778,325,269	3.7699%	46.7227%
7	Qatar	21,672,038,650	3.5868%	50.3096%
8	Singapore	19,217,589,225	3.1806%	53.4902%
9	France	18,128,411,400	3.0004%	56.4905%
10	Turkey	17,180,661,359	2.8435%	59.3340%
11	Japan	16,990,015,370	2.8119%	62.1460%
12	Netherlands	15,793,797,175	2.6140%	64.7599%
13	Canada	14,756,948,312	2.4424%	67.2023%
14	Ireland	14,428,167,318	2.3879%	69.5902%
15	Russian Federation	12,201,634,090	2.0194%	71.6097%
16	Spain	9,864,004,663	1.6325%	73.2422%
17	Thailand	9,697,340,540	1.6050%	74.8472%
18	Australia	9,684,340,250	1.6028%	76.4500%
19	Malaysia	8,280,258,118	1.3704%	77.8204%
20	Scandinavia (2)	8,188,829,017	1.3553%	79.1757%

(1) Including: Hong Kong SAR, Macao SAR and Taiwan Province of China

(2) Including: Denmark, Norway and Sweden



## Total Scheduled Freight Tonne-Kilometres (FTK)

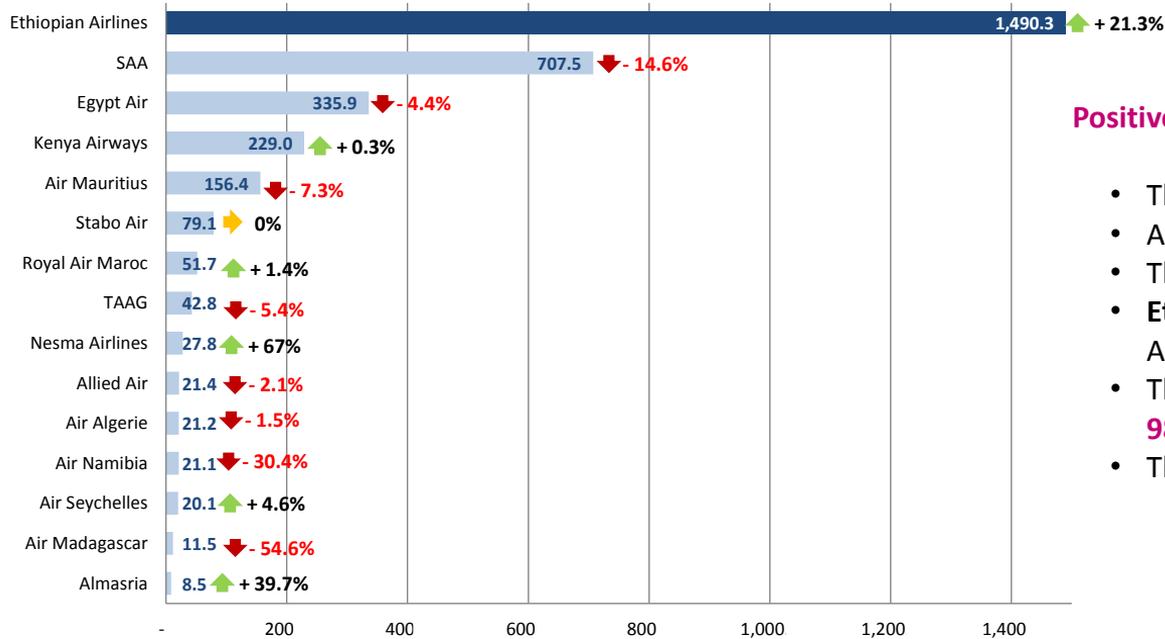


### Positive growth rates were the trend in 2016

- The world grew up **+ 3.7%** in total FTK
- Africa region grew up **+ 2.8%** in total FTK
- The **98%** of FTK performed by African airlines is in international services
- The top 15 African airlines **+3.0%** in total FTK
- **Ethiopian Airlines** focus the **44.5%** of the total FTK in Africa
- The share of the top 15 airlines in Africa total FTK is **97.9%**
- The share of top 15 airlines in world total FTK is **1.1%**

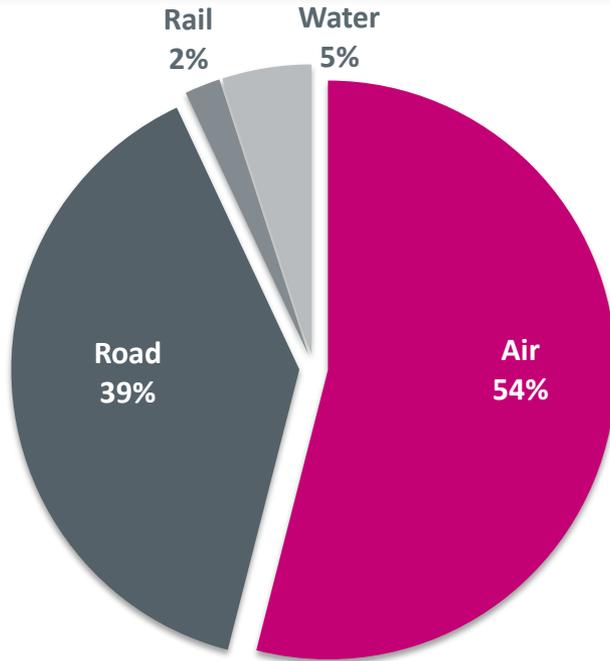


## International Scheduled Freight Tonne-Kilometres (FTK)



### Positive growth rates were the trend in 2016

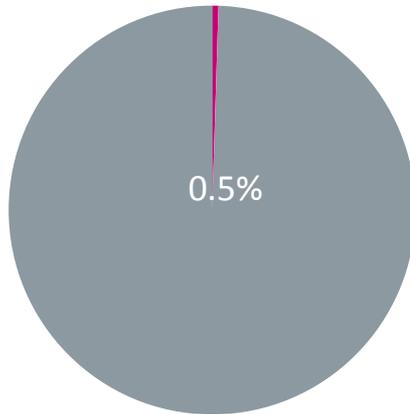
- The world grew up **+ 3.4%** in international FTK
- Africa region grew up **+ 3.1%** in international FTK
- The top 15 African airlines **+3.3%** in international FTK
- **Ethiopian Airlines** focus the **46%** of the total FTK in Africa
- The share of the top 15 airlines in Africa total FTK is **98%**
- The share of top 15 airlines in world total FTK is **1.4%**



More than **half** of international inbound tourist arrived by air in 2015

## Volume of world international cargo shipment

Aviation

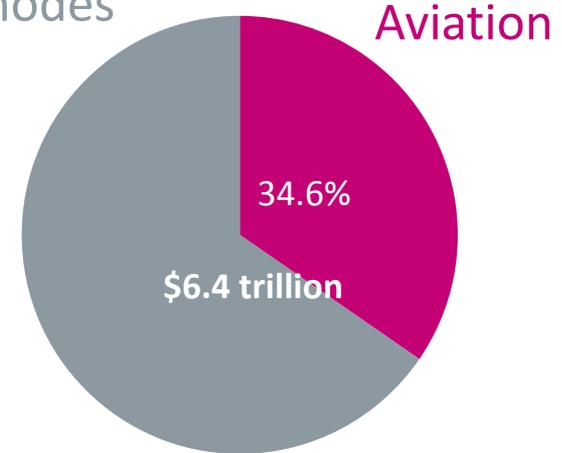


Surface modes

**One third of the value of world trade is shipped by air**

## Value of world international cargo shipment

Surface modes





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# E-Commerce

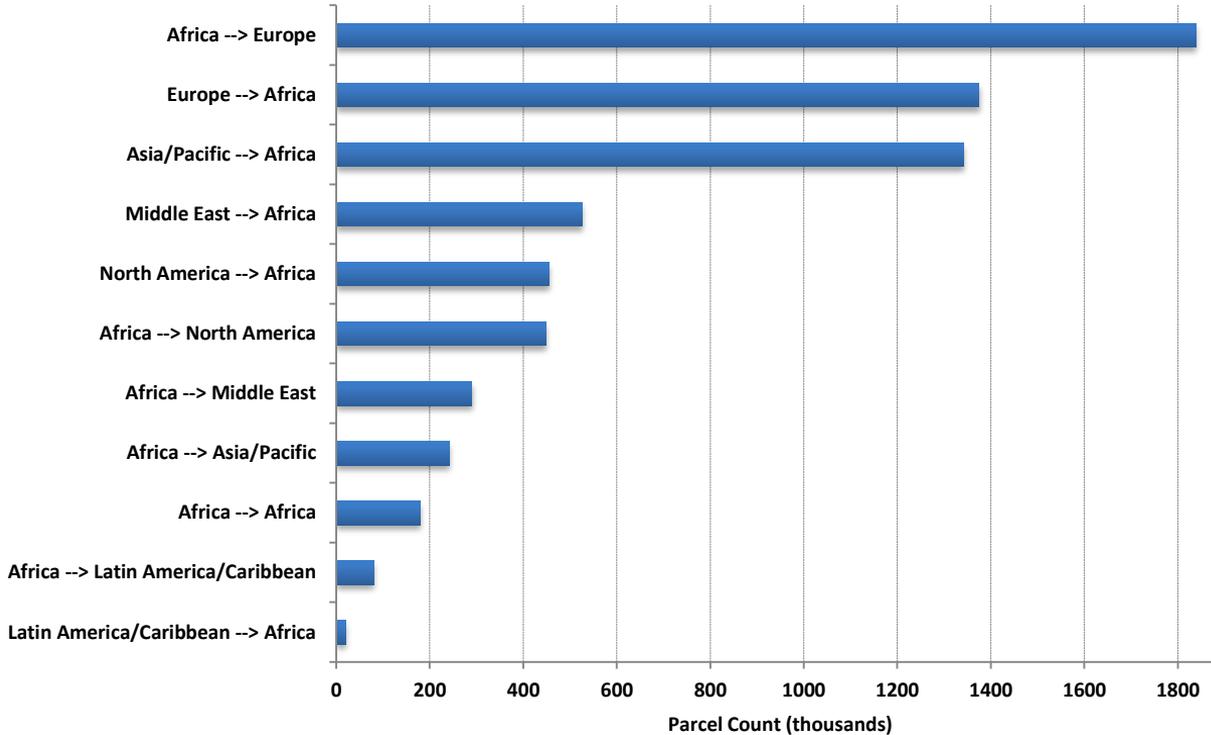


**Electronic commerce (e-commerce)** refers to “the production, advertising, sale and distribution of products via telecommunications networks” (World Trade Organization, WTO)

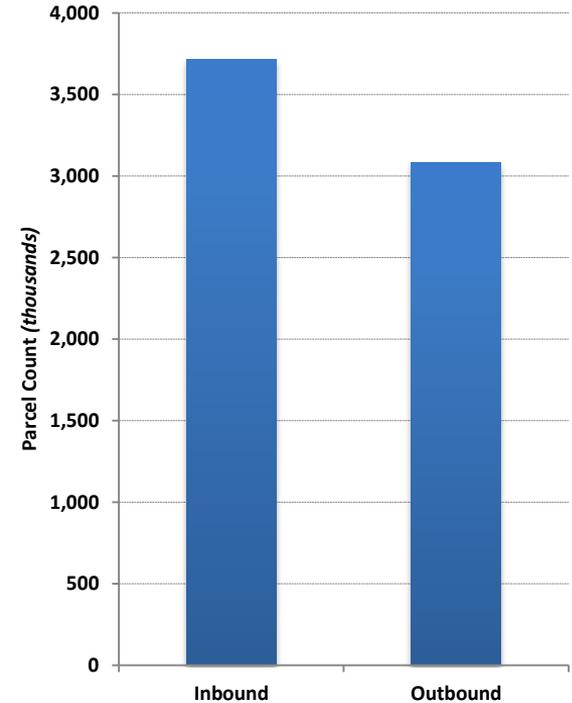
**Electronic shopping (e-shopping)** refers to “the advertising, sales, payment and delivery of products and services via the Internet, covering the whole supply chain from the seller to the buyer” (Universal Postal Union, UPU)



### Africa E-Commerce\* Activity 2015 (one Way)

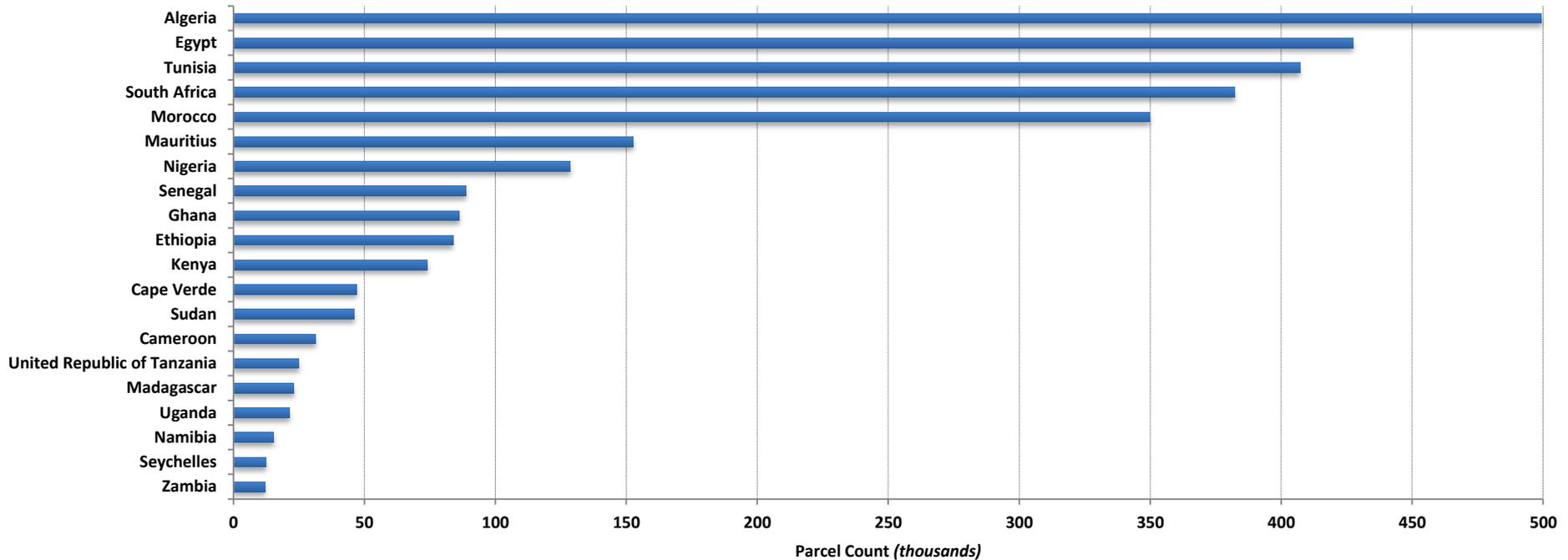


### Africa Overall E-commerce Activity 2015



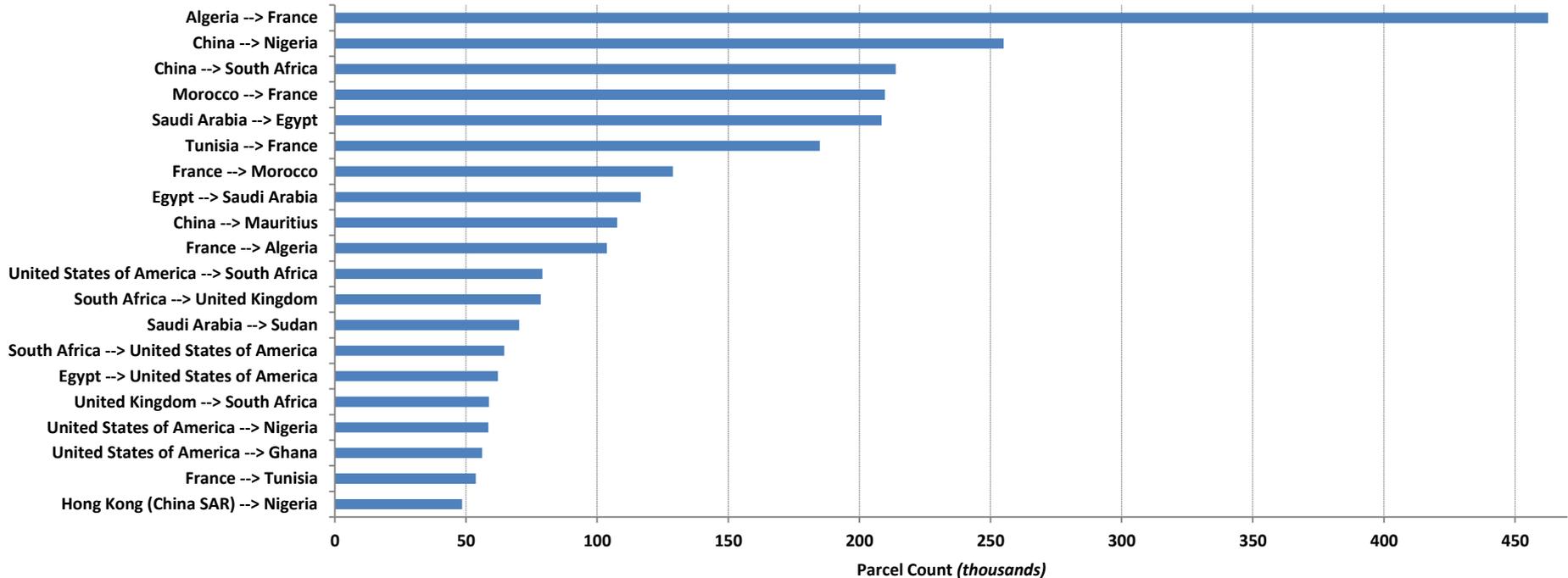


### Africa E-commerce Activity Top 20 African Countries (Departure basis, Number of Parcels)





## Africa E-Commerce Activity Top 20 Country-Pairs (One Way, Number of Parcels)



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## Organizational Structure of the eTrade for All Initiative

### Partners

All Partners contribute to eTrade for All in the following ways:

- Providing relevant information about their technical assistance programmes and projects under the specified areas
- Responding to requests for assistance
- Engaging in collaborative projects as appropriate
- Fostering innovative thinking and idea generation
- Furthering rigorous analysis of e-commerce development
- Discussing and defining common goals
- Representing eTrade for All as and when required, for instance, at meetings and conferences
- Agreeing on an annual work programme for eTrade for All, including overall strategies and proposals built around the core objectives of the initiative
- Forming as appropriate and on a volunteer basis task groups to prepare for or undertake specific joint activities in line with the overall objectives of eTrade for All
- Contributing inputs to a formal end of year report with relevant information on activities undertaken in the context of eTrade for All
- Reviewing applications by potential Partners to join eTrade for All

The partners include the [African Development Bank \(AfDB\)](#), [Consumers International \(CI\)](#), the [Enhanced Integrated Framework \(EIF\)](#), [E-residency \(Estonia\)](#), the [International Association of Prosecutors \(IAP\)](#)/Global Prosecutors Network (GPen), [the International Civil Society Aviation Organization \(ICAO\)](#), the [Internet Society \(ISOC\)](#), the [International Islamic Trade Finance Corporation \(ITFC\)](#), the [International Trade Center \(ITC\)](#), the [International Telecommunication Union \(ITU\)](#), the [United Nations Conference on Trade and Development \(UNCTAD\)](#), the [United Nations Economic Commission for Africa \(UNECA\)](#), the [United Nations Economic Commission for Europe \(UNECE\)](#), the [United Nations Economic Commission for Latin America and the Caribbean \(UNECLAC\)](#), the [United Nations Economic and Social Commission for Asia and the Pacific \(UNESCAP\)](#), the [United Nations Economic and Social Commission for West Africa \(UNESCAWA\)](#), the [United Nations Social Impact Fund](#), the [Universal Postal Union \(UPU\)](#), the [World Bank Group](#), the [World Customs Organization \(WCO\)](#), and the [World Trade Organization \(WTO\)](#).

### Business for eTrade Development Council

To ensure effective public-private dialogue, eTrade for All works in close partnership with the Business for eTrade Development Council, established and managed independently by the private sector. Regular meetings of the Council will be convened and ideas emanating from these meetings will serve as inputs into discussions and meetings of eTrade for All. For countries and partners engaged in eTrade for All, interaction with the Advisory Council may serve as a mechanism to engage the private sector when discussing observed problems related to e-commerce and possible solutions.

The partners include: Alibaba Group, African Alliance for Ecommerce, the Bangladesh Association of Software and Information Services,

### The eTrade for All Initiative

- [About the Initiative](#)
- [Principles](#)
- [Policy Areas](#)
- **[Partners](#)**

### Featured Publication



Information Economy Report 2015: Unlocking the Potential of E-commerce for Developing Countries

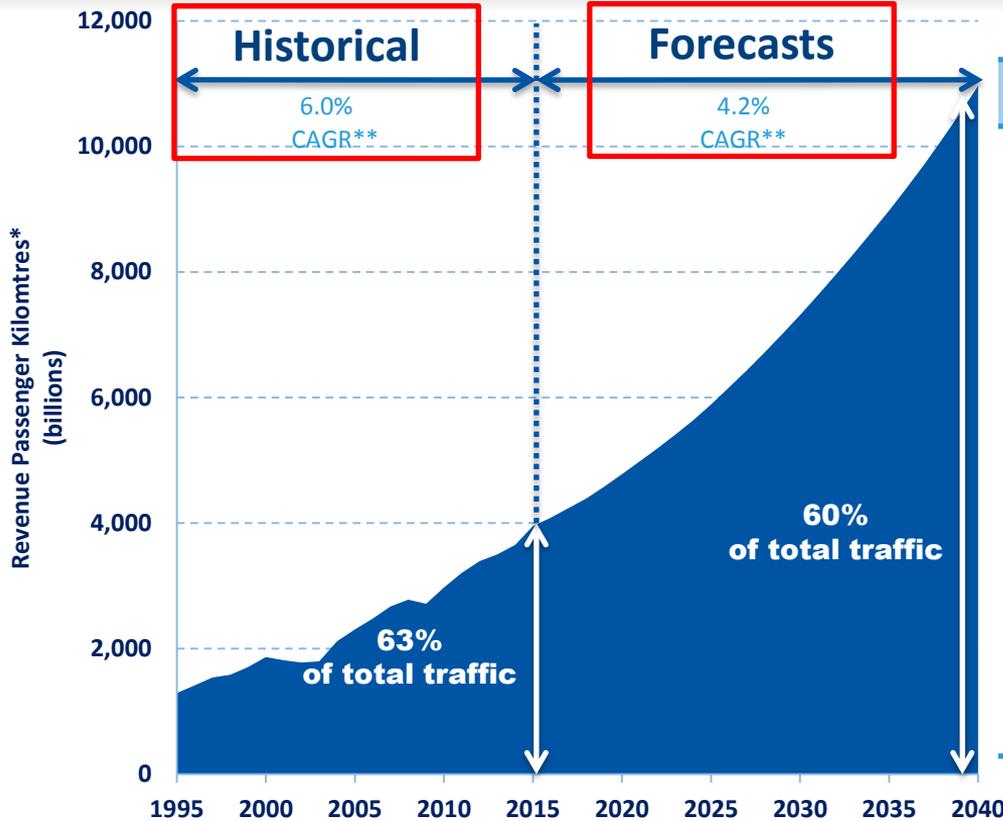
### Related Events

- Official launch of eTrade for All at UNCTAD 14
- UNCTAD E-Commerce Week 2016



# Long-term air traffic forecasts

## Scheduled international passenger traffic

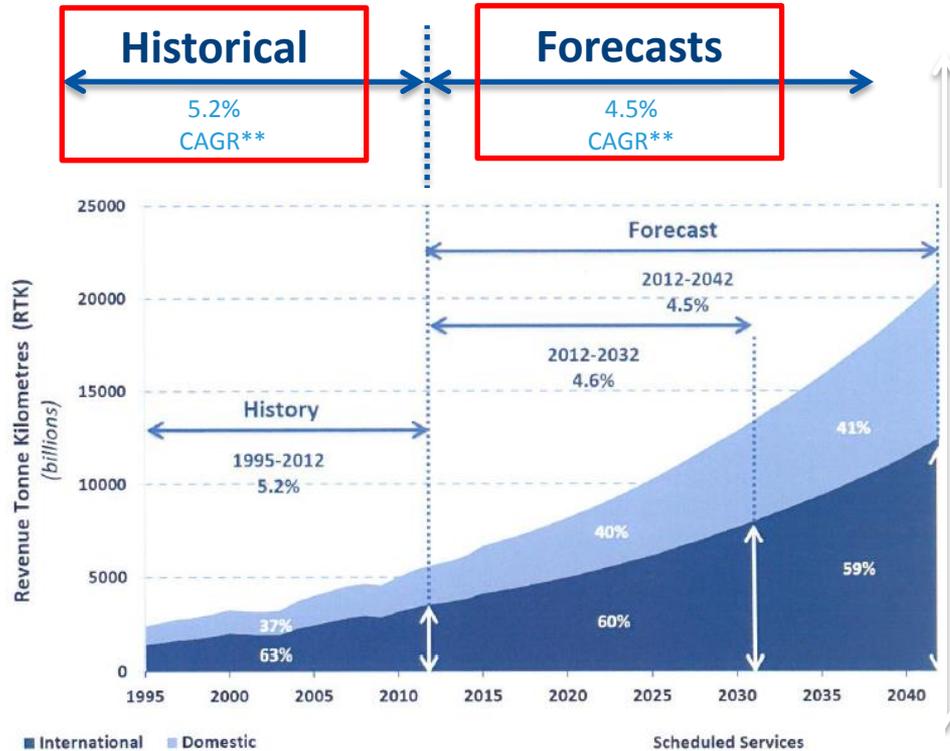


Projected Top 10 Routes 2040

Rank 2040	Rank 2015	Long Term Forecast Route Group	Share 2040	Share 2015
1	4	Central Southwest Asia - Pacific South East Asia	11.9%	5.4%
2	1	Intra Europe	11.5%	15.8%
3	8	Central Southwest Asia - Middle East	11.3%	3.9%
4	2	Europe - North America	9.0%	11.8%
5	3	Central Southwest Asia - Europe	7.3%	5.8%
6	5	Intra Pacific South East Asia	6.1%	4.5%
7	7	Central Southwest Asia - North America	5.9%	4.1%
8	18	Central Southwest Asia- North Asia	4.6%	1.9%
9	6	Europe - Middle East	3.6%	4.5%
10	9	Europe - Pacific South East Asia	3.5%	3.6%

# Long-term air traffic forecasts RTK and FTK

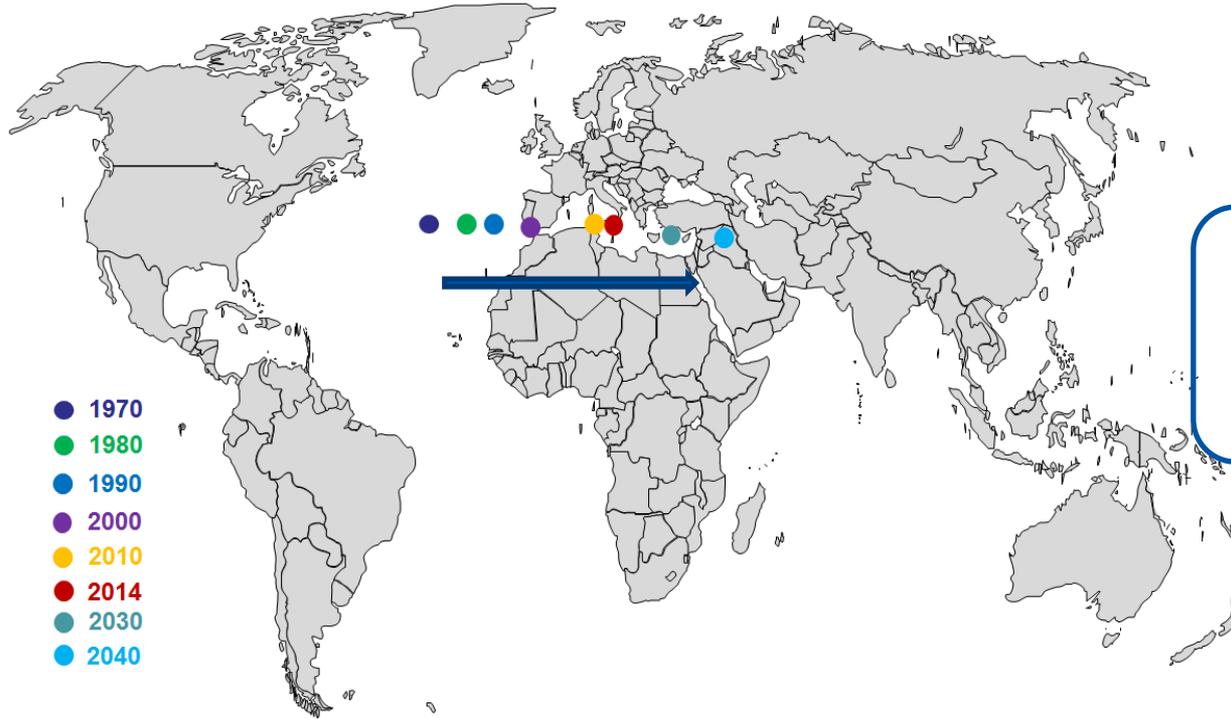
## Revenue Tonne Kilometre (RTK)



## Freight Tonne Kilometre (FTK)

Region	Service	CARG* 2012-2042
World	Total	4.2%
	Domestic	4.2%
	International	4.0%
Africa	Total	2.2%
	Domestic	2.2%
	International	0.1%

# Centre of gravity



The **centre of gravity** has been steadily moving from the **middle of North Atlantic** to the **middle of the Mediterranean sea** in the last four decades. It is expected to move further east by 2040.

Geographical centre of gravity of departing/arriving passengers



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**A39 Outcomes**

Sustainable Development Agenda



- Acknowledgement of need to consider a new ICAO Global Air Transport Plan.
- Endorsement of action plan for the finalization of the international agreements being developed by ICAO for the liberalization of market access, air cargo and air carrier ownership and control.
- Endorsement of the action plan for further customization of long term traffic forecasts for global and regional forecasts for aviation personnel (Doc 9956) to meet the requirements of the ICAO Next Generation Aviation Professional (NGAP) programme.



- Promote the strengthening of partnerships in the area of data sharing and analysis with the UN, its agencies, international, regional organizations and academia to increasing financing and investments for the development of air transport activities.
- Increased awareness and promotion of various updated policy guidance and tools.
- Increased awareness and promotion of the ICAO long-term vision for air transport liberalization and core principles on consumer protection.
- Increased awareness and promotion of various tools and analysis jointly developed by partners.



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A39 Outcomes

**Global Challenges for Air Cargo**



## ICAO Long-term Vision for Liberalization

(Assembly Resolution A39-15)

*“We, the Member States of the International Civil Aviation Organization, resolve to actively pursue the continuous liberalization of international air transport to the benefit of all stakeholders and the economy at large.*

*We will be guided by the need to ensure respect for the highest levels of safety and security and the principle of fair and equal opportunity for all States and their stakeholders”.*



- Development of “**soft infrastructure**” (cross-border transport laws, regulation related to border crossing, and organizational systems and resources)
- Implementing **ICAO’s Global Aviation Security Plan (GASeP)**
- Introduction of programmes for **Authorized Economic Operators**
- Submission of all the information required by public authorities, in connection with arrival, stay and departure of an aircraft and air cargo, to a single entry point (**Single Window**)



- States should integrate aviation and multi-modal transport strategies into their **national development plans**
- **PIDA** (Programme for Infrastructure Development in Africa) should support States in the development of “hard infrastructure” (such as airports, railways, cargo transshipment facilities, national border facilities)



- States should clearly identify where financing is required through **gap-analyses** between forecasted demand and capacity needed
- States should take pragmatic measures to build a **transparent, stable and predictable investment climate** to support aviation development (e.g. engaging multiple stakeholders, diversifying funding sources, and associating the private sector)



- States and financial institutions should contribute to the **ICAO/AFCAC Human Resources Development Fund (HRDF)**
- Sensitize States, as well as relevant international and regional organizations, on the **economic benefits** of enhanced connectivity for air cargo



- Convention for the Unification of Certain Rules for International Carriage by Air (**MC99**)
- Protocol To The Convention On International Interests In Mobile Equipment On Matters Specific To Aircraft Equipment (**Cape Town** on 16 November 2001)