



| ICAO

INTERNATIONAL CIVIL AVIATION ORGANIZATION

A UN SPECIALIZED AGENCY

Eleventh North American, Central American and Caribbean
Directors of Civil Aviation Meeting (NACC/DCA/11)

P/11 Agenda Item 6

Air Transport Updates

Presented by the Secretariat



Air Transport Updates

**The Eleventh North American, Central American and Caribbean
Directors of Civil Aviation Meeting (NACC/DCA/11)**

International Civil Aviation Organization (ICAO)

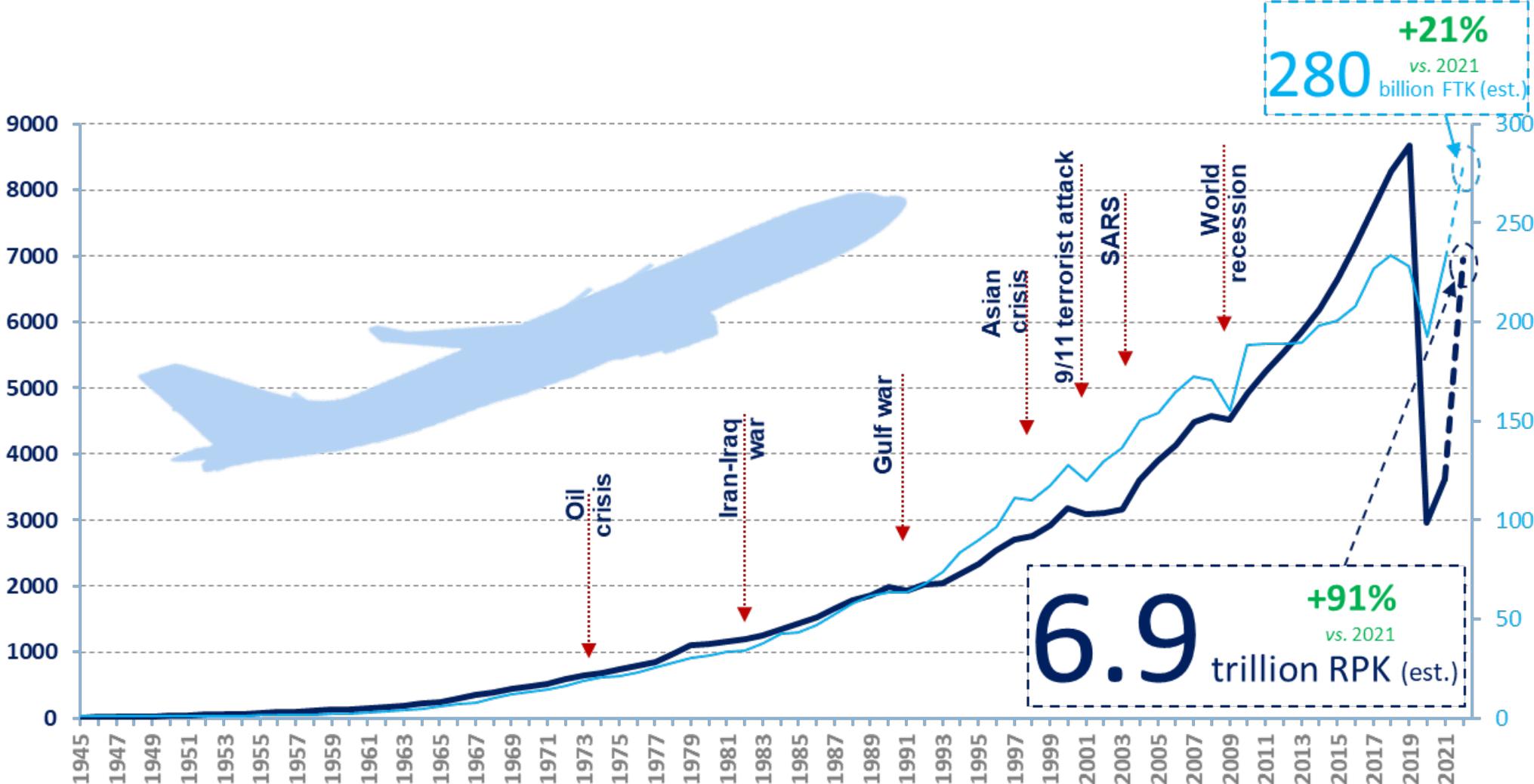
State of the Industry

Global traffic: A recovery from the pandemic shock



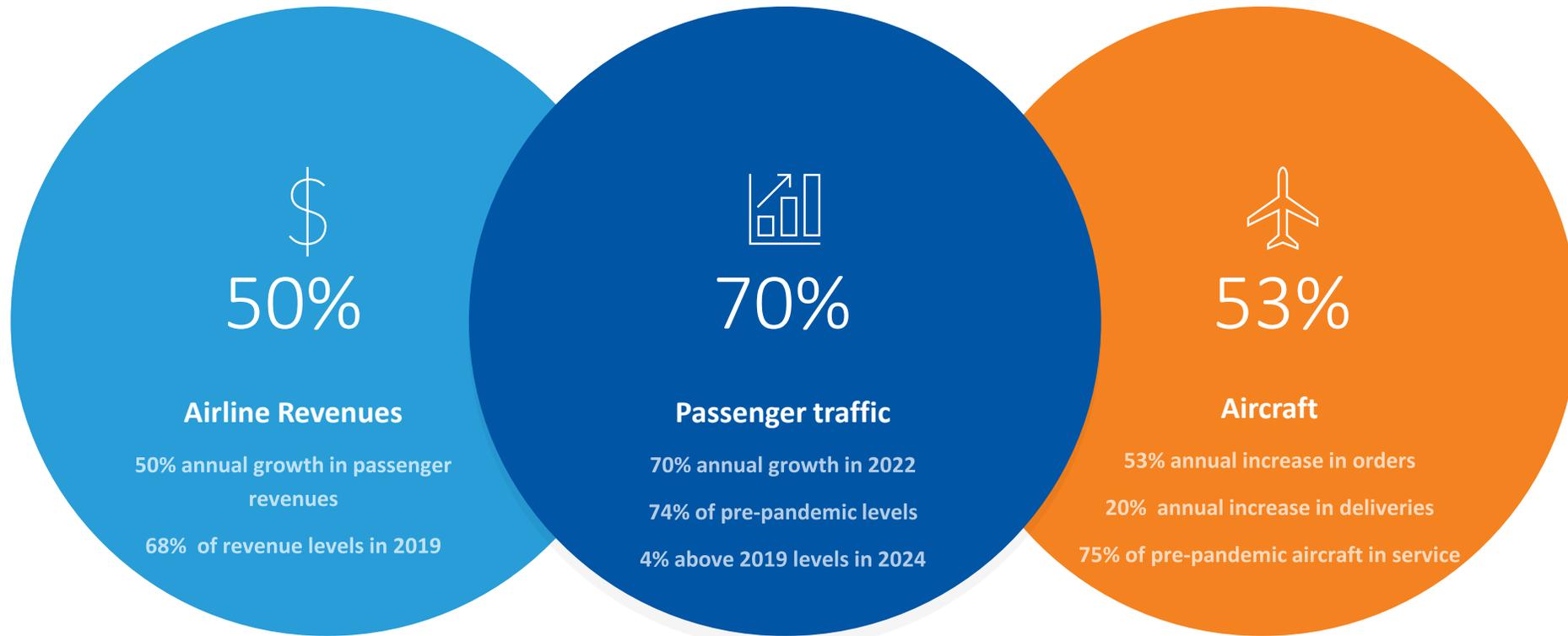
Revenue Passenger-Kilometres (billion)

Freight Tonne-Kilometres (billion)

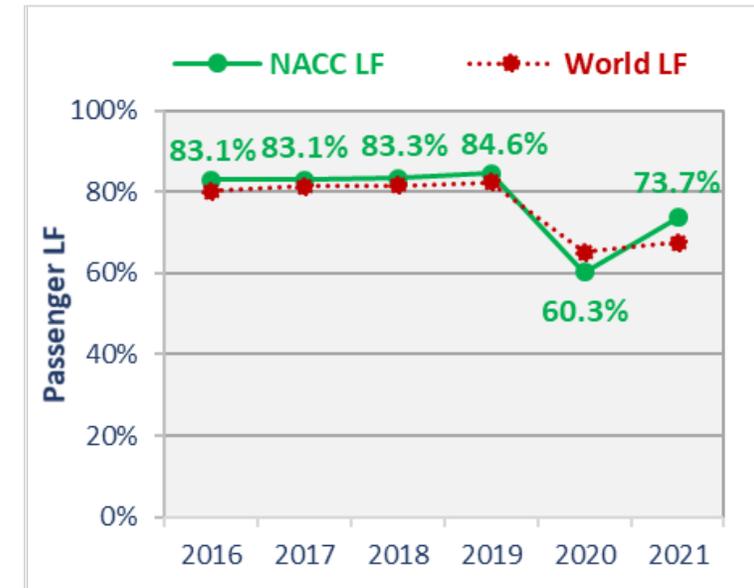
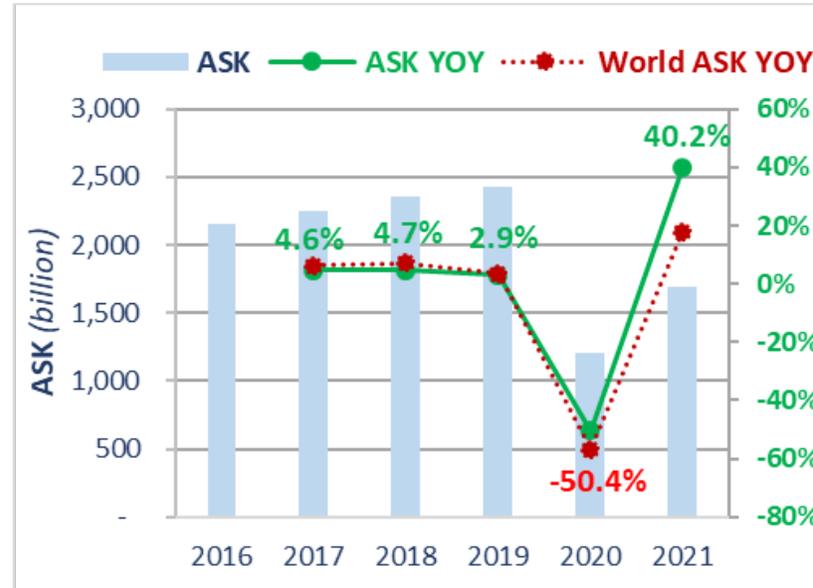
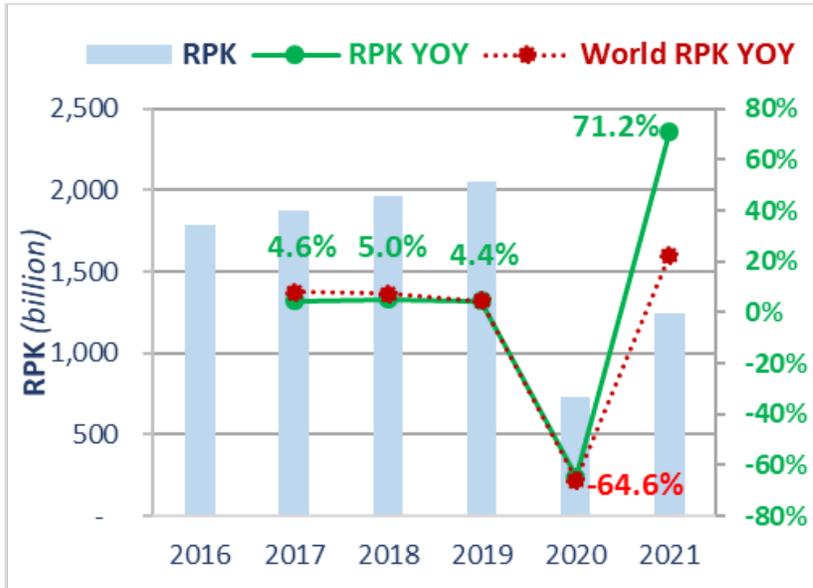


Scheduled commercial traffic

2022 Global Recovery overview



NACC Passenger Traffic



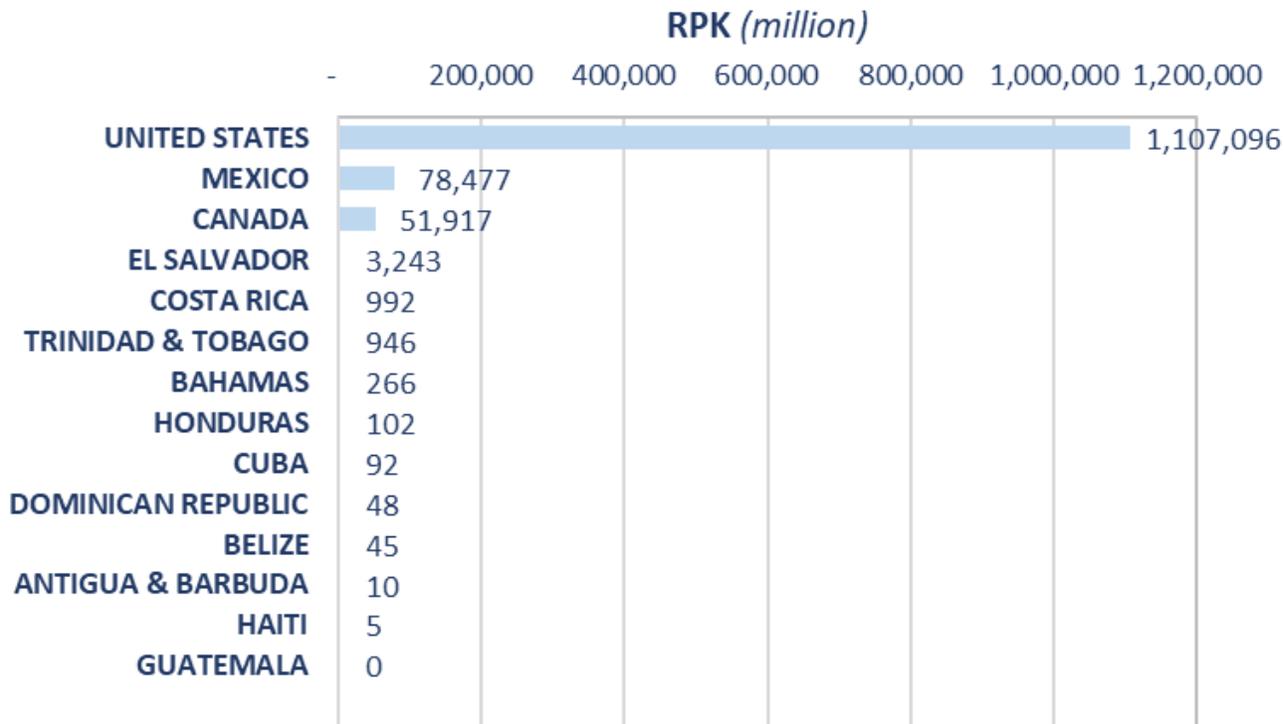
- Passenger traffic in RPKs recovered by 71.2% in 2021 after the declined by -64.6% in 2020.
- Passenger traffic recovered higher than the world average.

- Seat Capacity in Available Seat-Kilometres (ASKs) recovered by 40.2% in 2021 after the decline by -50.4%.
- Capacity recovered higher than world average.

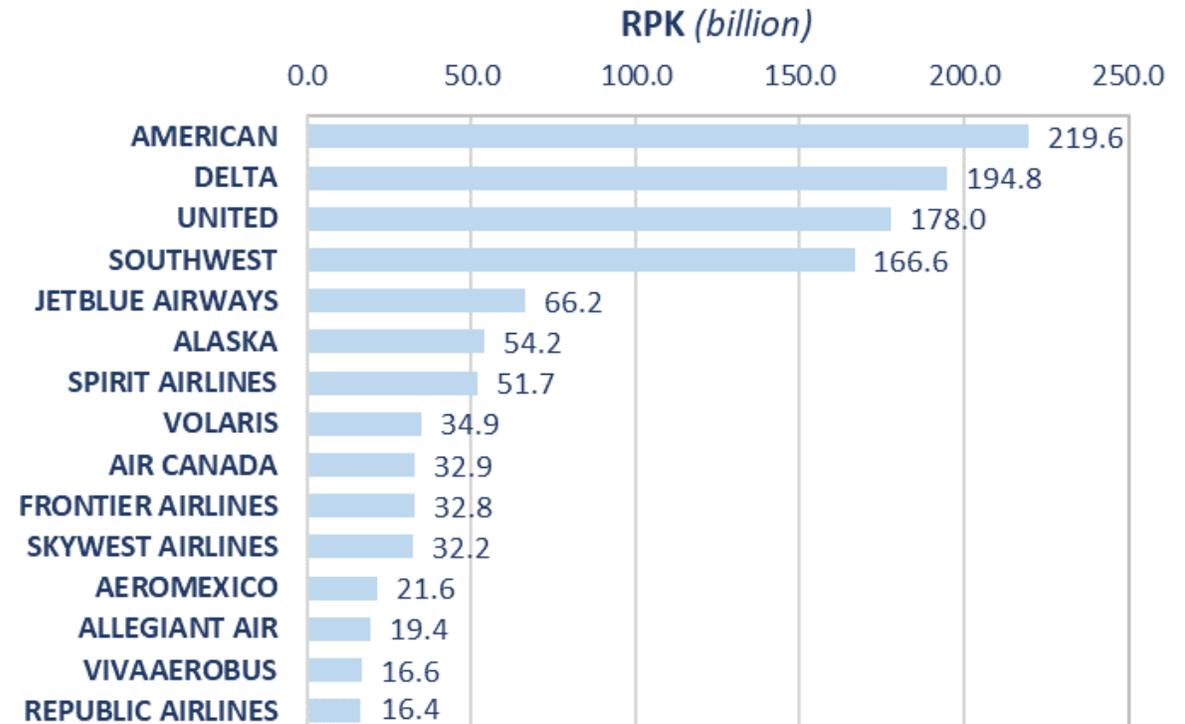
- Passenger load factor declined to 73.7% in 2021.
- Passenger load factor is higher the world average.

NACC Passenger Traffic

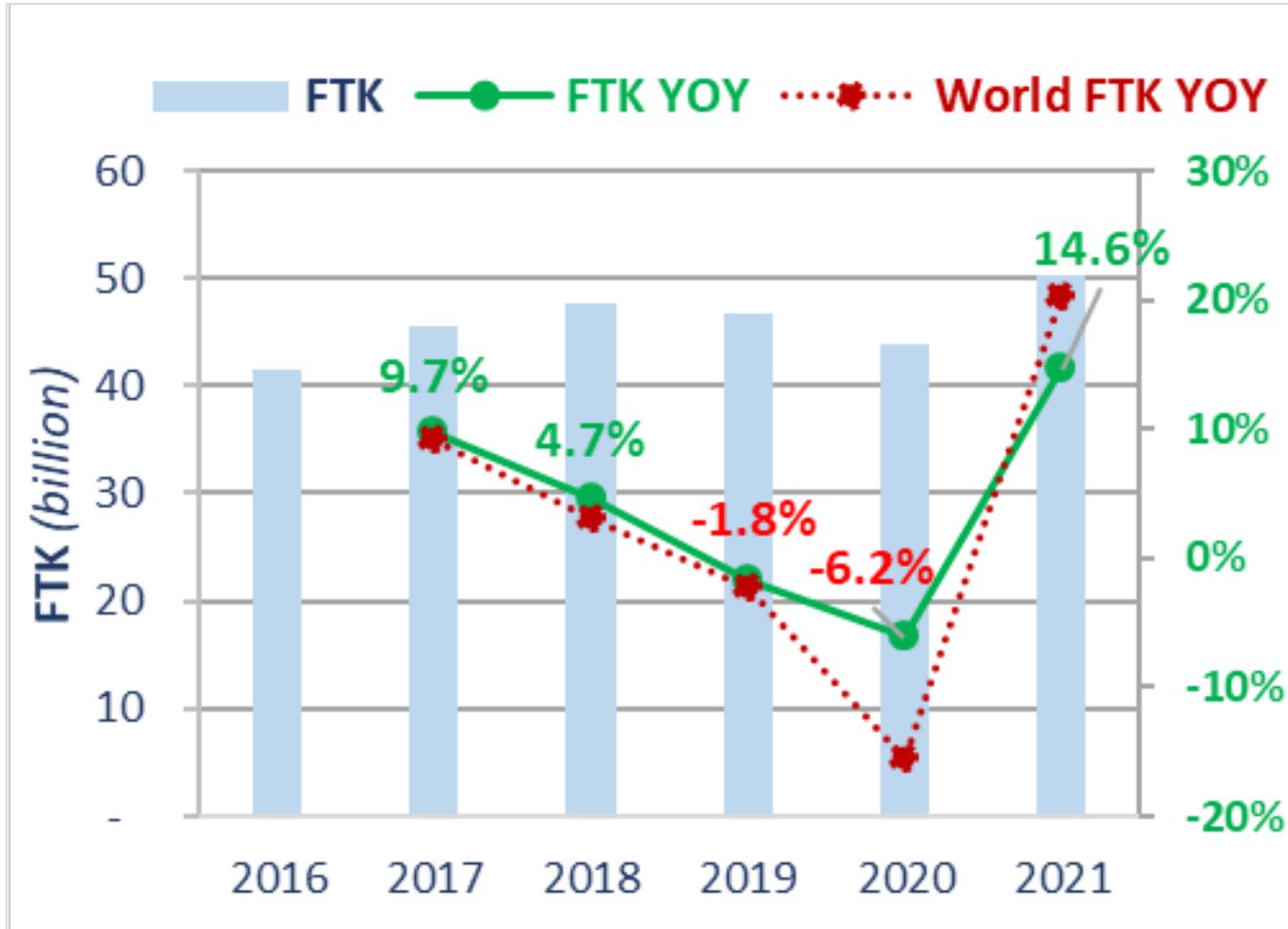
State ranking by Revenue Passenger-Kilometres



Airline ranking by Revenue Passenger-Kilometres



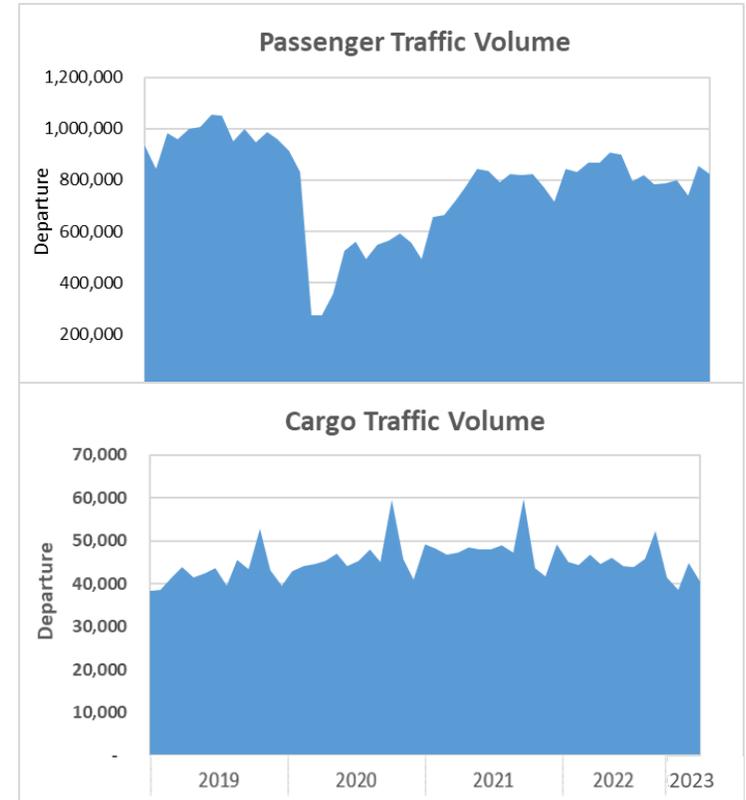
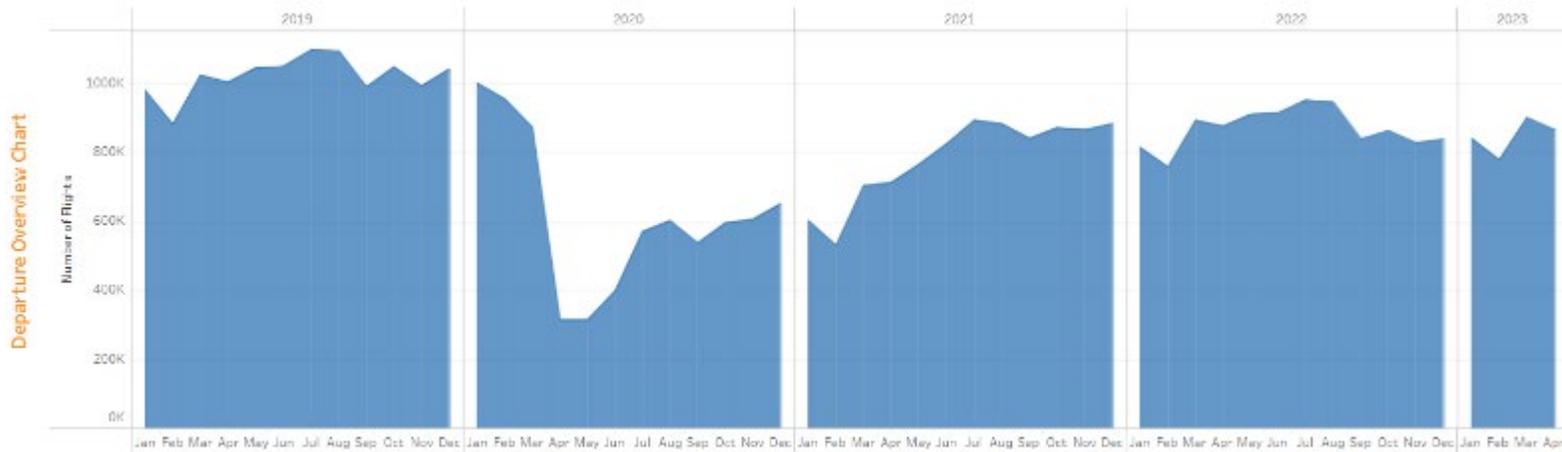
NACC Cargo Traffic



- Cargo traffic measures in Freight Tonnes-Kilometres (FTKs) recovered by 14.6% in 2021, surpassing the 2018-2019 results.
- FTK YOY rate is below the world average

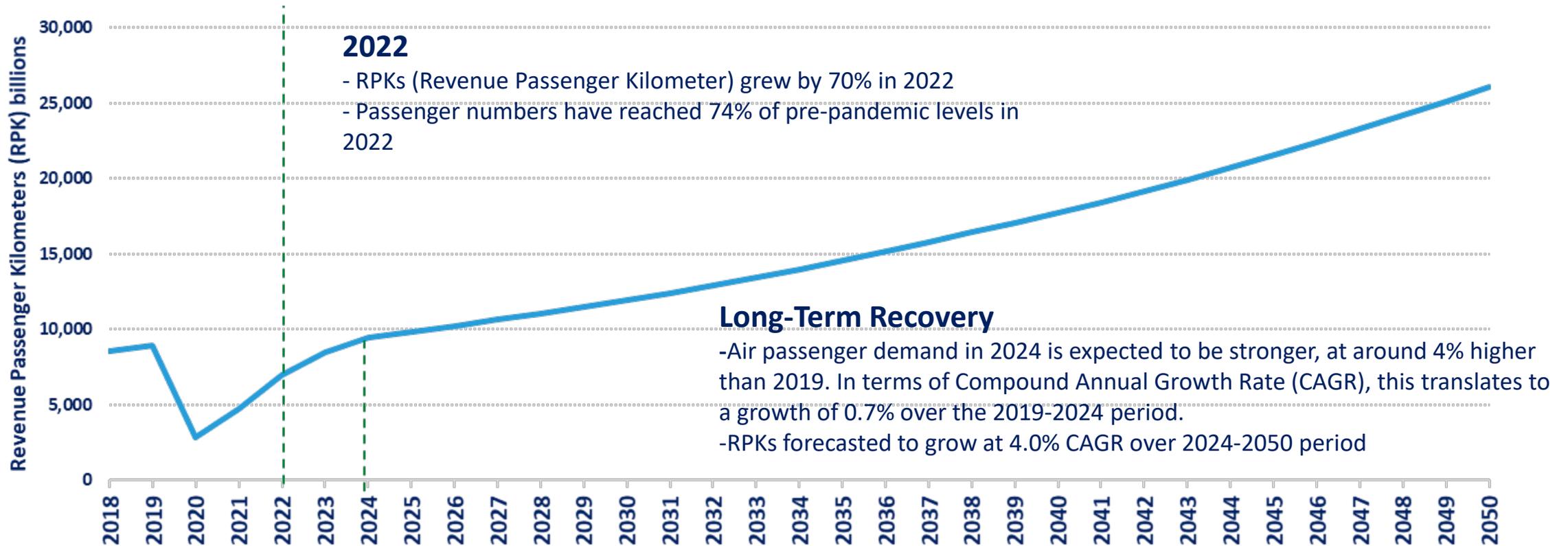
NACC Evolution of traffic

Total Traffic Volume



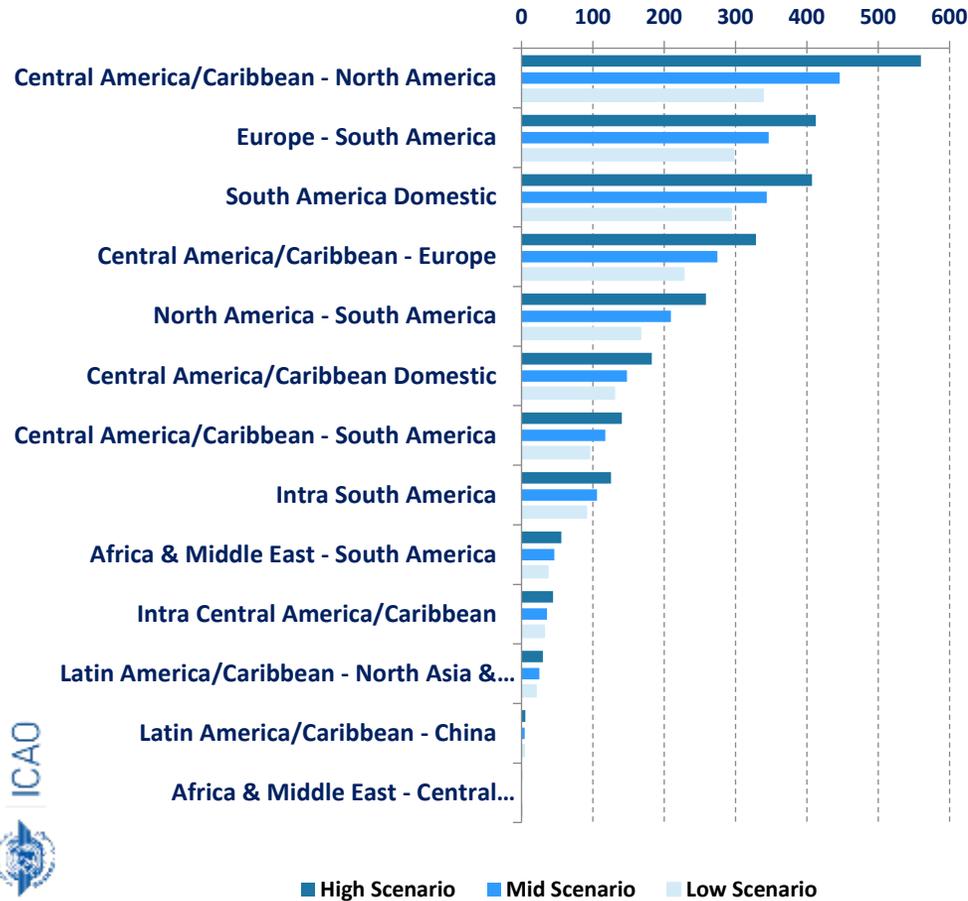
- Passenger traffic in NACC region in departure volume shows constant recovery since the pandemic shock in 2020.
- Scheduled passenger departure volume in 2022 recovered by 84% compared with 2019.
- Scheduled cargo departure volume, on the other hand, shows a slight decreasing phase after the pandemic.

Long Term Traffic Forecast (RPKs)

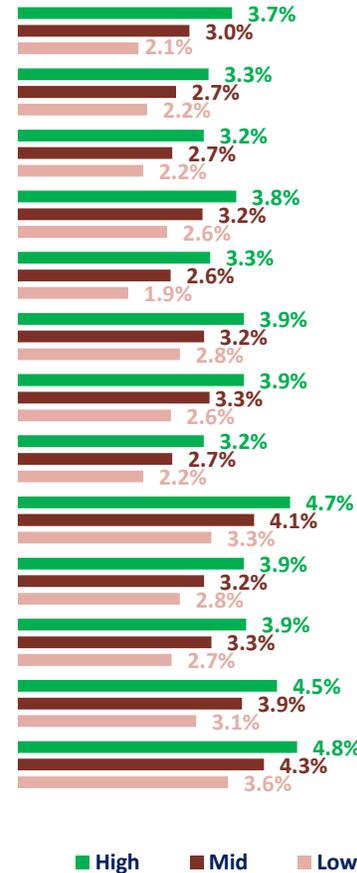


Latin America/ Caribbean

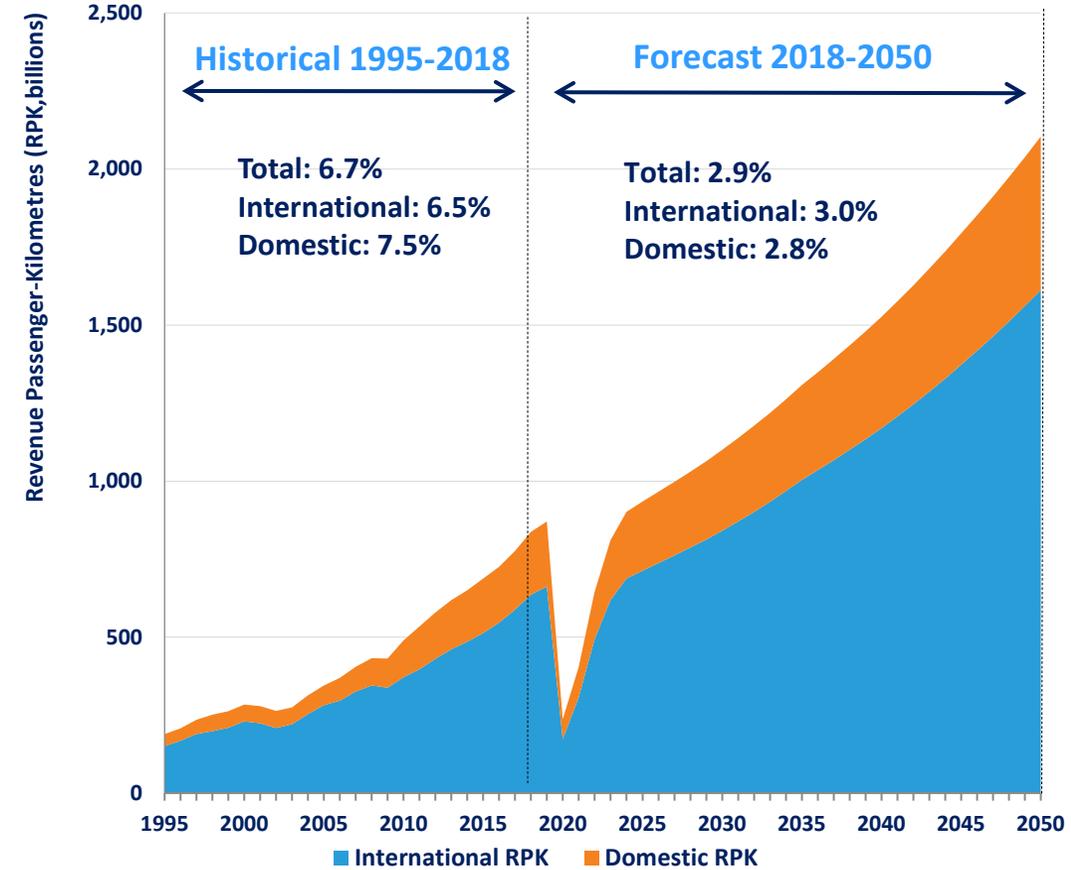
Revenue Passenger-Kilometres, 2050 (RPK, billions)



CAGR 2018-2050



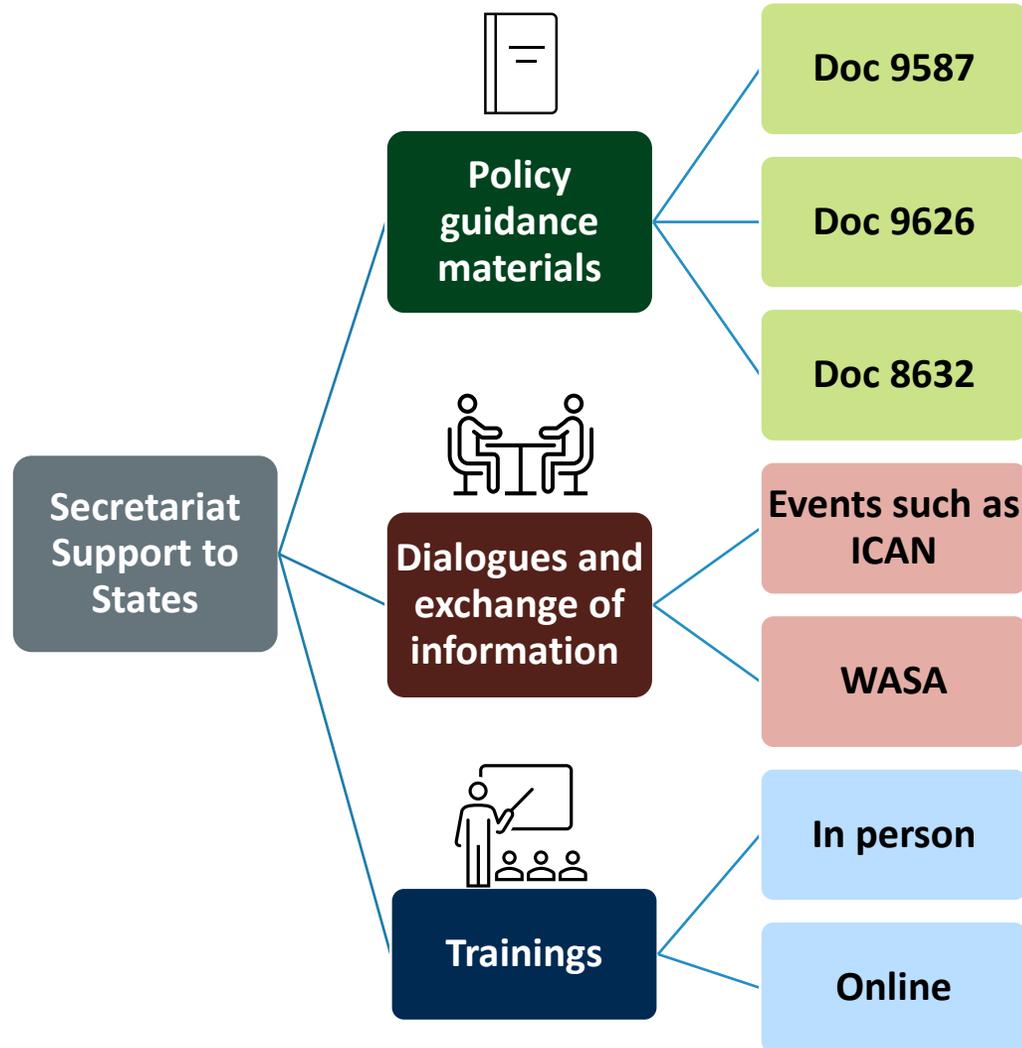
Latin America/Caribbean (Mid Scenario)



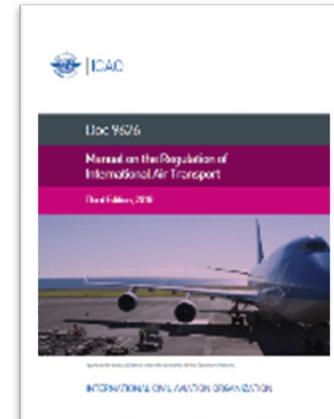
Air Transport Policy and Regulation

ICAO's Long-term Vision for International Air Transport Liberalization ¹³

✈️ A41 - "Urges all Member States to give regard to, and apply, the ICAO Long-term Vision for International Air Transport Liberalization in policy making and regulatory practices"



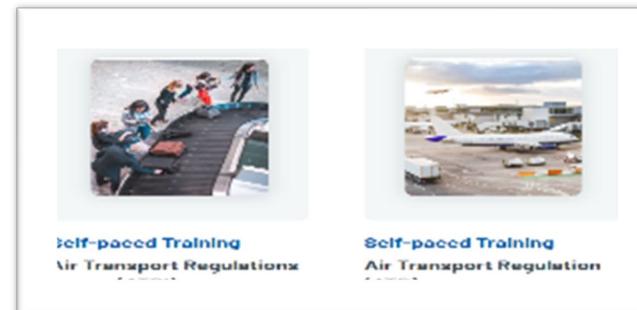
Doc 9587



Doc 9626



Doc 8632



Ongoing works by the Air Transport Regulation Panel (ATRP)

Airline ownership and control

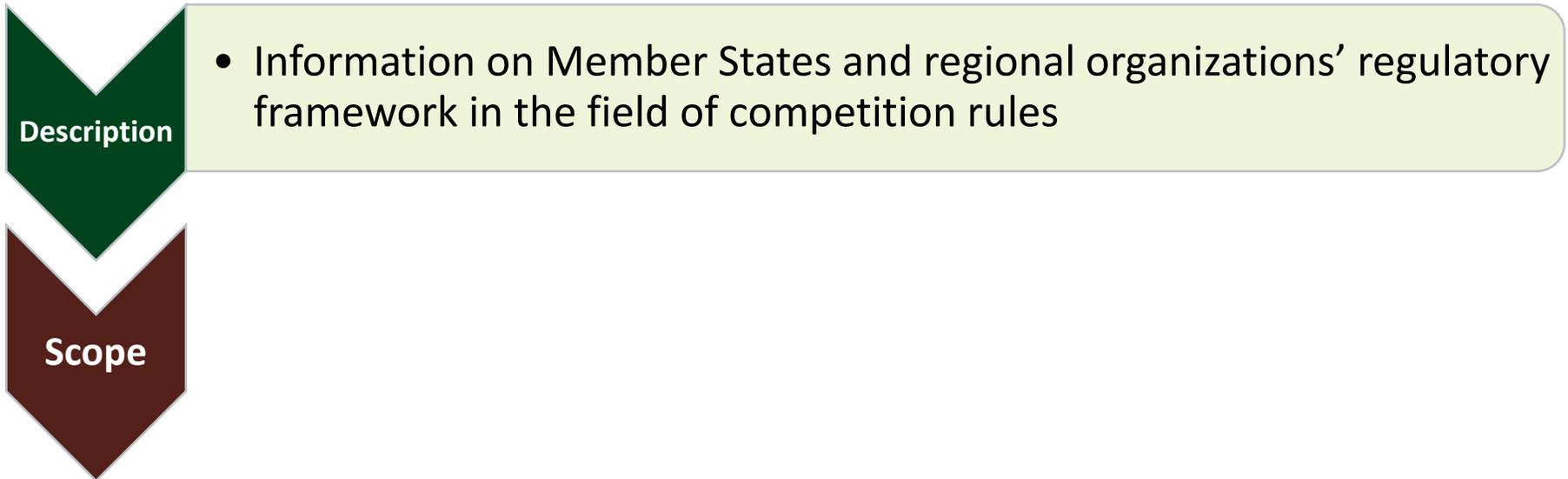
- Address the remaining issues of concern on draft Convention on Foreign Investment in Airlines

Liberalization of air cargo

- Examination of whether there is a need for a specific agreement to further liberalize air cargo services

Unmanned aircraft

Competition laws and policies



Consumer protection and Emergency Response Planning

Montréal Convention of 1999

- 139 Parties – **including 15 NACC States**

Aviation Data and Analysis

The fourth meeting of the Aviation Data and Analysis Panel ¹⁸ (ADAP/4)

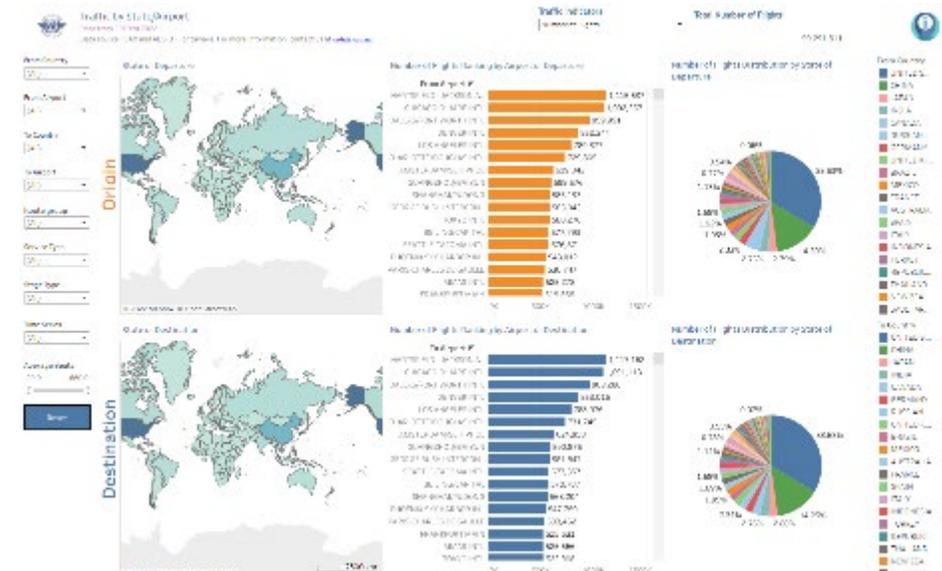
✈ At ICAO Headquarters in Montréal from 5 to 8 September 2023

Agenda items:

1. Report on the outcome of the 41st Session of the Assembly
2. Report on the Eleventh Session of the Statistics Division (STA/11)
3. Presentation of the Aviation Satellite Account (ASA) methodological framework
4. Review the methodologies and reporting with respect to the ICAO statistics programme
5. Development of methodologies to collect, process and analyze Big Data
6. Update of the long-term traffic forecasts
7. Examination of a proposed Global Aviation Competitiveness Index
8. Report of the on-going collaboration with the Universal Postal Union (UPU)

ICAO Traffic and Economic dashboards

- ✈ Interactive dashboards developed using Tableau platform, which provide **visualization** and **customized querying capabilities**
- ✈ cover a **wide array of analytics** ranging from operations, fleet usage, passenger carried, Flight Information Region (FIR) traffic, and revenue impact on airlines, airports and air navigation services providers (ANSPs) at different levels of granularity
- ✈ Each Member States has been provided with a free license.
- ✈ **Regional Personnel by Gender Analysis** dashboard was released recently on the participation of licensed female aviation personnel in the workforce to tackle reducing the still significant aviation gender gap.



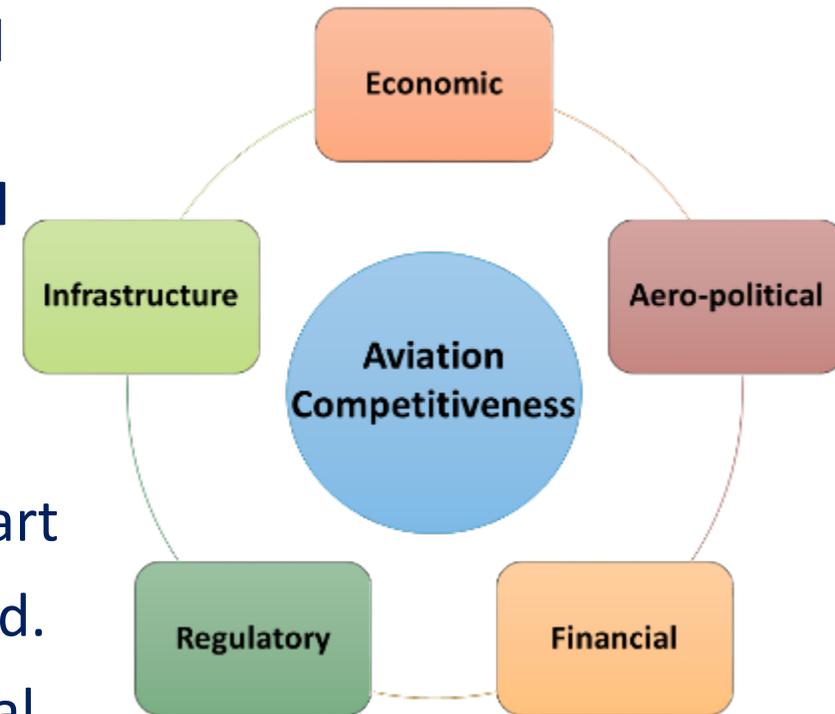
Development of Aviation Competitiveness Index

Objectives

- ✈ The ACWG commonly agreed that the objective of the competitiveness index is **to measure the performance of the aviation of a State and its ability to create and maintain value from the sector.**
- ✈ use a standardized methodology to measure **the level of competitiveness of the aviation sector.**

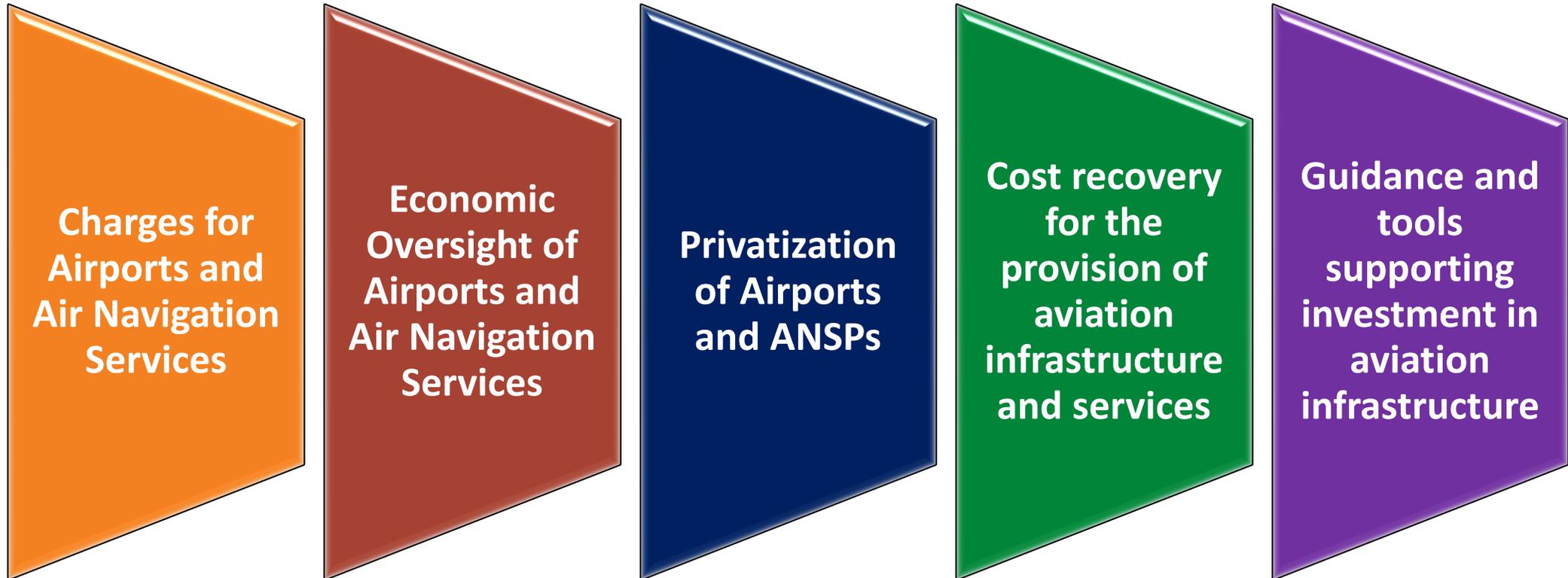
Progress

- ✈ **5 basic pillars** of the index were determined: right chart
- ✈ Detailed indicators and metrics are currently discussed.
- ✈ ADAP/4 in September will provide advice and technical recommendations on the activities.

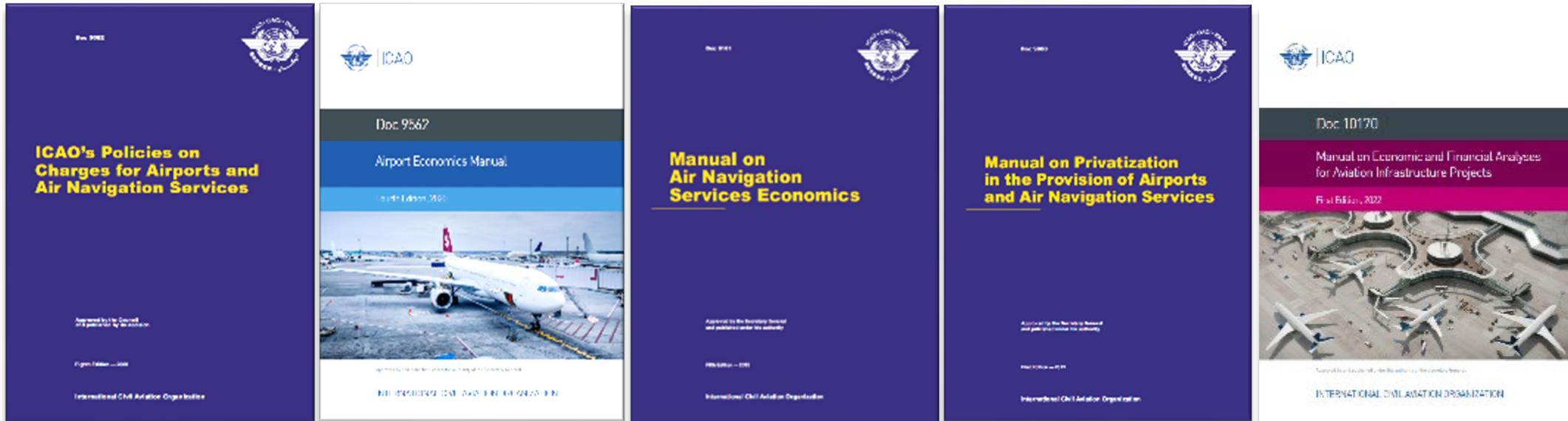


Infrastructure Management

Infrastructure Management



Harmonizing global regulatory framework by developing policies and guidance



Doc 9082

Doc 9562

Doc 9161

Doc 9980

Doc 10170

- **Doc 9082** – ICAO's Policies on Charges for Airports and Air Navigation Services
- **Doc 9562** – Airport Economics Manual
- **Doc 9161** – Manual on Air Navigation Services Economics

- **Doc 9980** – Manual on Privatization in the Provision of Airports and Air Navigation Services
- **Doc 10170** – Manual on Economic and Financial Analyses for Aviation Infrastructure Projects

Outcome of the Eighth Joint Meeting of the Airport Economics Panel and the Air Navigation Services Economics Panel (AEP-ANSEP/8)

- ✈ Virtual panel meeting held from 29 November to 3 December 2021 (AEP-ANSEP/9 will be held in October 2023).
- ✈ Review of ICAO's policies on charges for airports and air navigation services
- ✈ Economic impact of COVID-19 on airports and air navigation services
- ✈ Guidance on cost recovery for the provision of MET services and space weather information
- ✈ Potential funding and financing for supporting the UAS operations
- ✈ Sustainable funding for CAAs and oversight functions
- ✈ New guidance and tools to support investment decisions of financing aviation infrastructure

Opportunities

Solid recovery of air traffic from the COVID-19 pandemic

Continued traffic growth of the region

Ongoing liberalization efforts

Challenges

Infrastructure deficiencies

Excessive charges and taxes on air transport

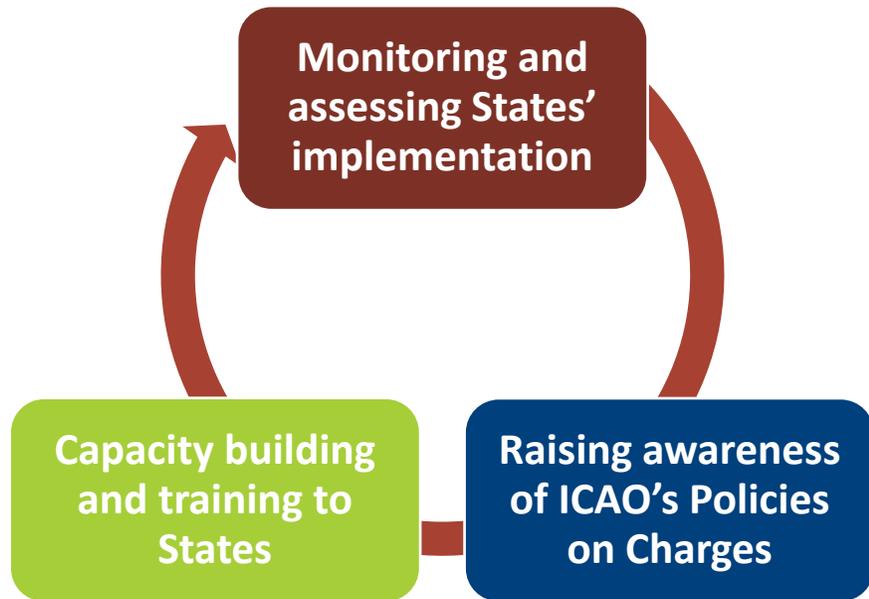
Proliferation of tourism taxes in the region

Economic contribution of aviation in Latin America/Caribbean

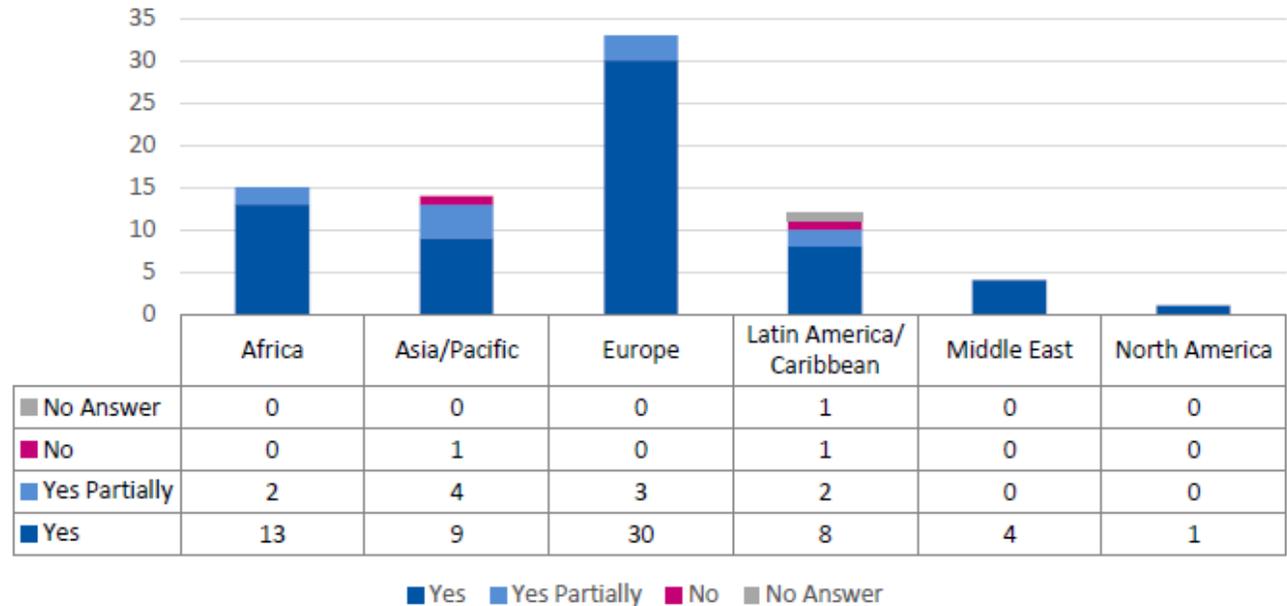


Implementation of ICAO's Policies

Enhancing the implementation of ICAO's policies on charges



States' implementation of ICAO's policies on charges for airports and air navigation services (2020)



ICAO's support to States

ICAO's capacity building support to States

Online training

Air Transport
Regulation online
course

Air Transport
Regulation Issues
online course

Air Transport
Economics online
course

Classroom/Virtual training

**Joint ICAO-ACI
training on Airport
User Charges**

Regional workshop/seminar

**Coordination with
the ICAO NACC and
SAM Office on a
regional workshop on
*Economic Oversight
of Air Transport***



Thank You!