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Effects of Novel Coronavirus (COVID-19) on Civil Aviation: Economic Impact Analysis

Montréal, Canada

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Air Transport Bureau



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Executive Summary: Economic Impact in Brief

Previous two (2) scenarios and six (6) different paths were restructured with new two (2) scenarios and four (4) different paths.

Figures and estimates herein are subject to substantial changes, and will be updated with the situation evolving and more information available.



The latest estimates indicate that the possible COVID-19 impact on world scheduled passenger traffic for the full year 2020, compared to Baseline (business as usual, originally-planned), would be:

- Overall reduction ranging from **40% to 53% of seats offered by airlines**
- Overall reduction of **2,247 to 2,915 million passengers**
- Approx. **USD 297 to 384 billion potential loss** of gross operating revenues of airlines

The impacts depend on duration and magnitude of the outbreak and containment measures, the degree of consumer confidence for air travel, and economic conditions, etc.

International passenger traffic for 2020, compared to Baseline

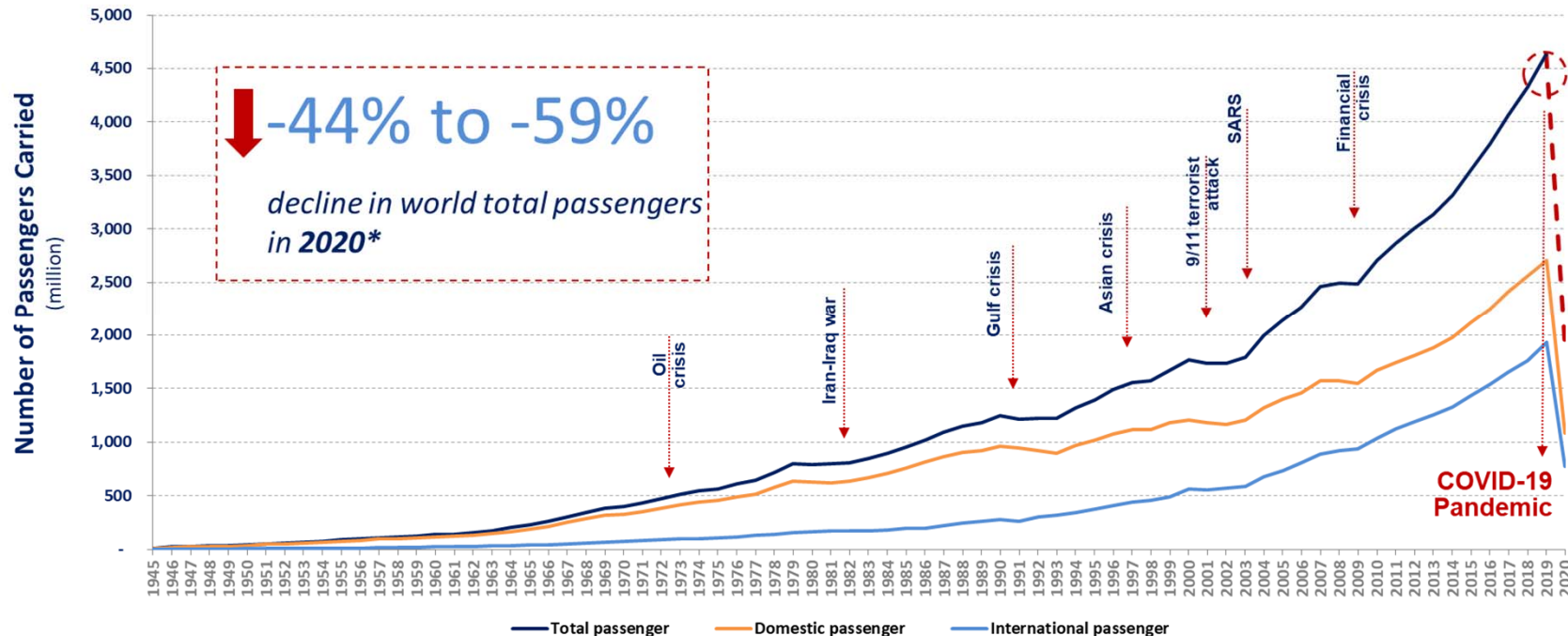
- Overall reduction ranging from **48% to 63% of seats offered by airlines**
- Overall reduction of **1,091 to 1,399 million passengers**
- Approx. **USD 193 to 248 billion potential loss** of gross operating revenues of airlines

Domestic passenger traffic for 2020, compared to Baseline

- Overall reduction ranging from **34% to 45% of seats offered by airlines**
- Overall reduction of **1,156 to 1,516 million passengers**
- Approx. **USD 104 to 136 billion potential loss** of gross operating revenues of airlines

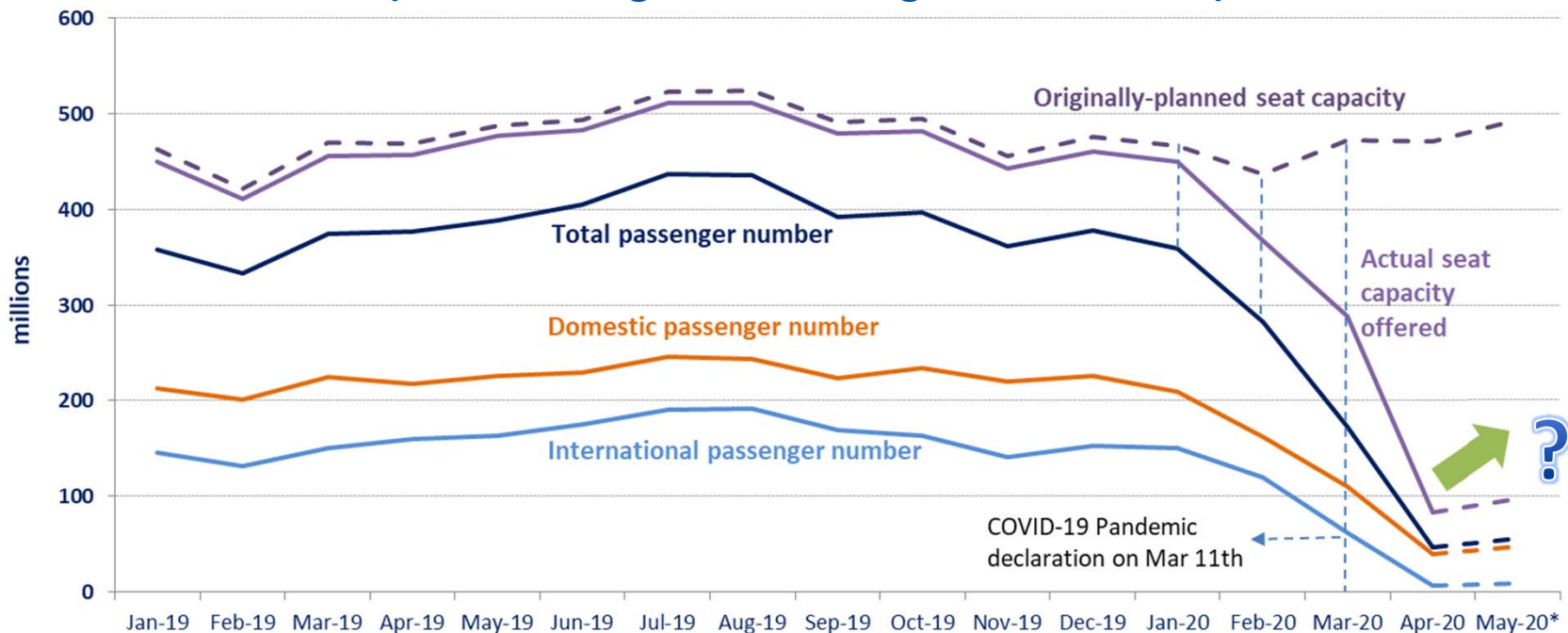
World passenger traffic collapses with unprecedented decline in history

World passenger traffic evolution 1945 – 2020*

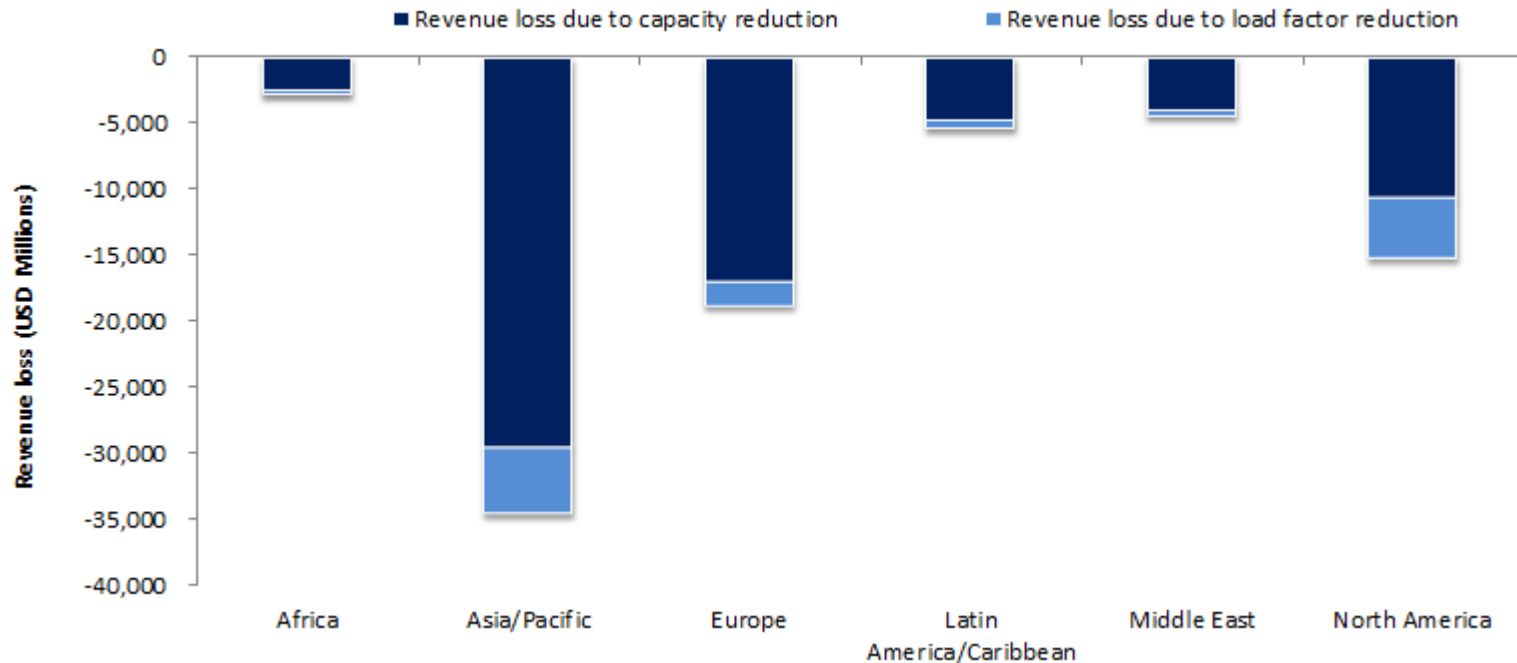


Drastic capacity cut along with dramatic drop in demand

Comparison of passenger numbers and capacity (A silver lining for bottoming out from June?)



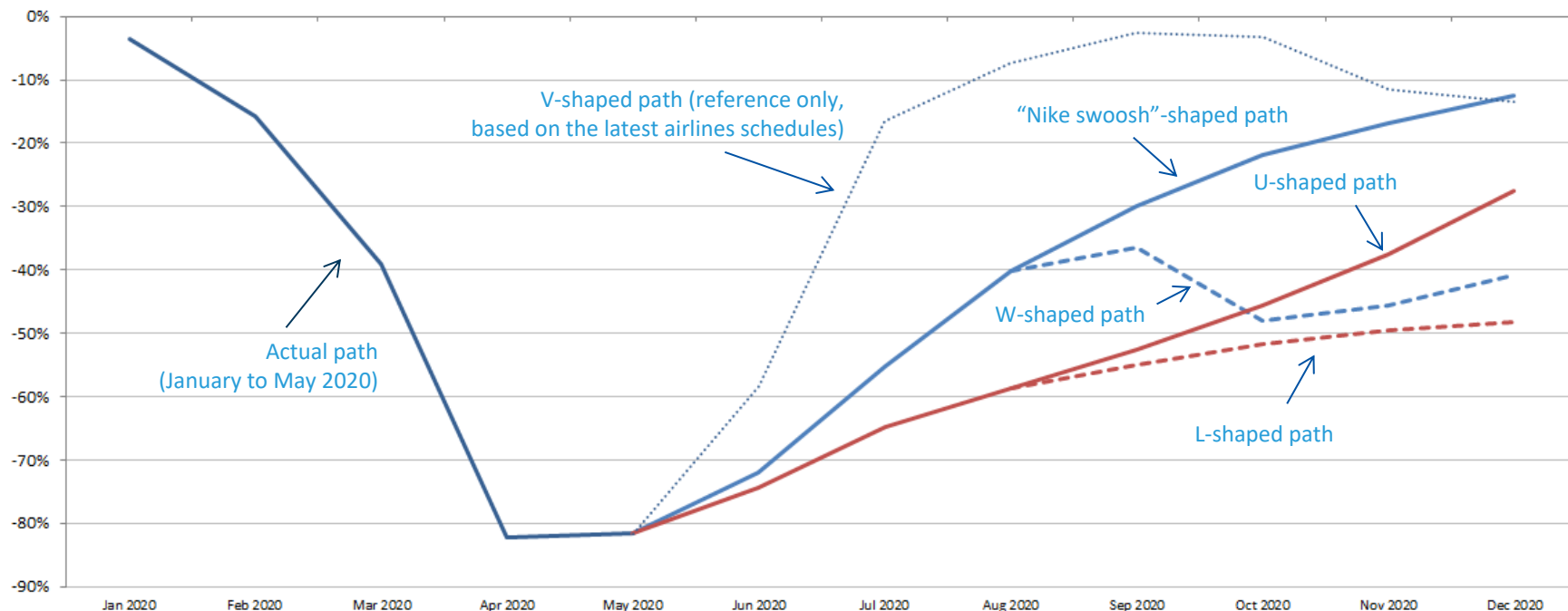
Approximately USD 81 billion passenger revenue loss from Jan to Apr 2020



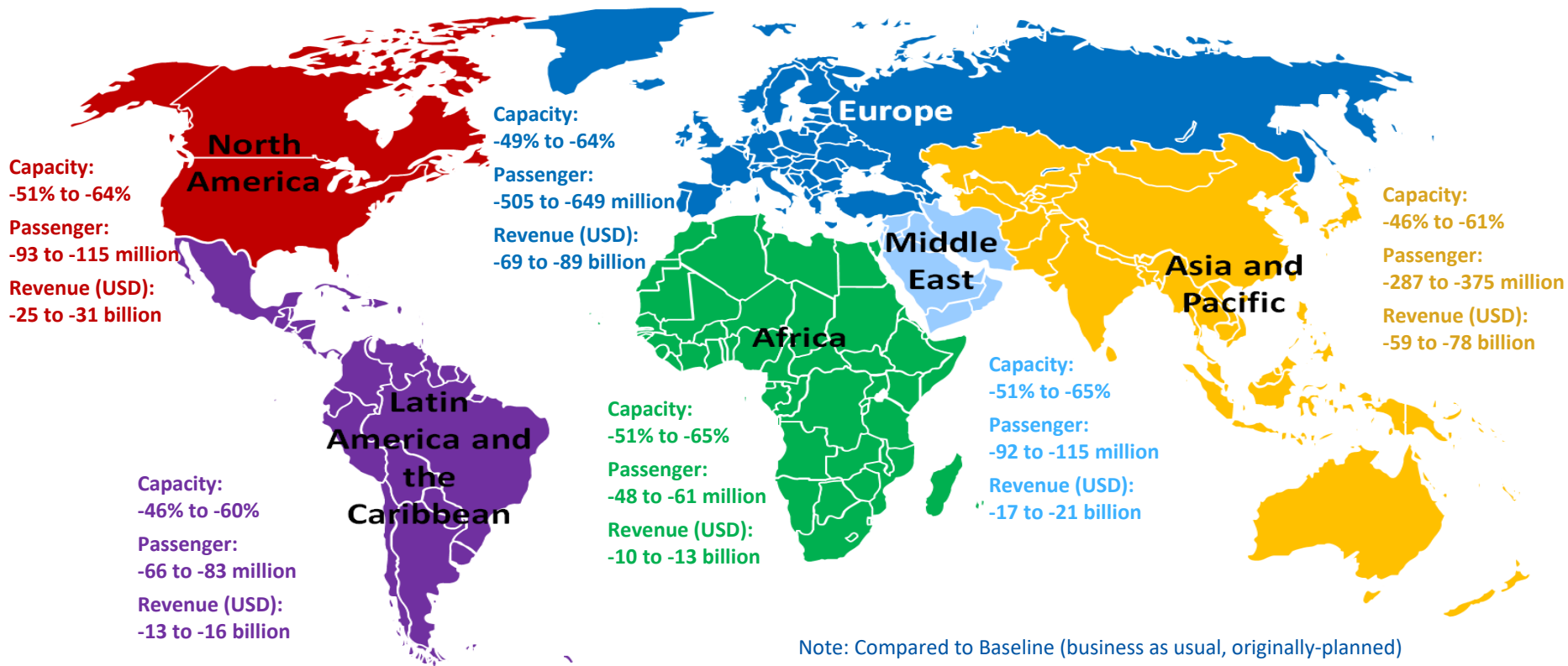
Note: Compared to Baseline (business as usual, originally-planned)

**Due to extreme uncertainty,
4 different paths are considered**

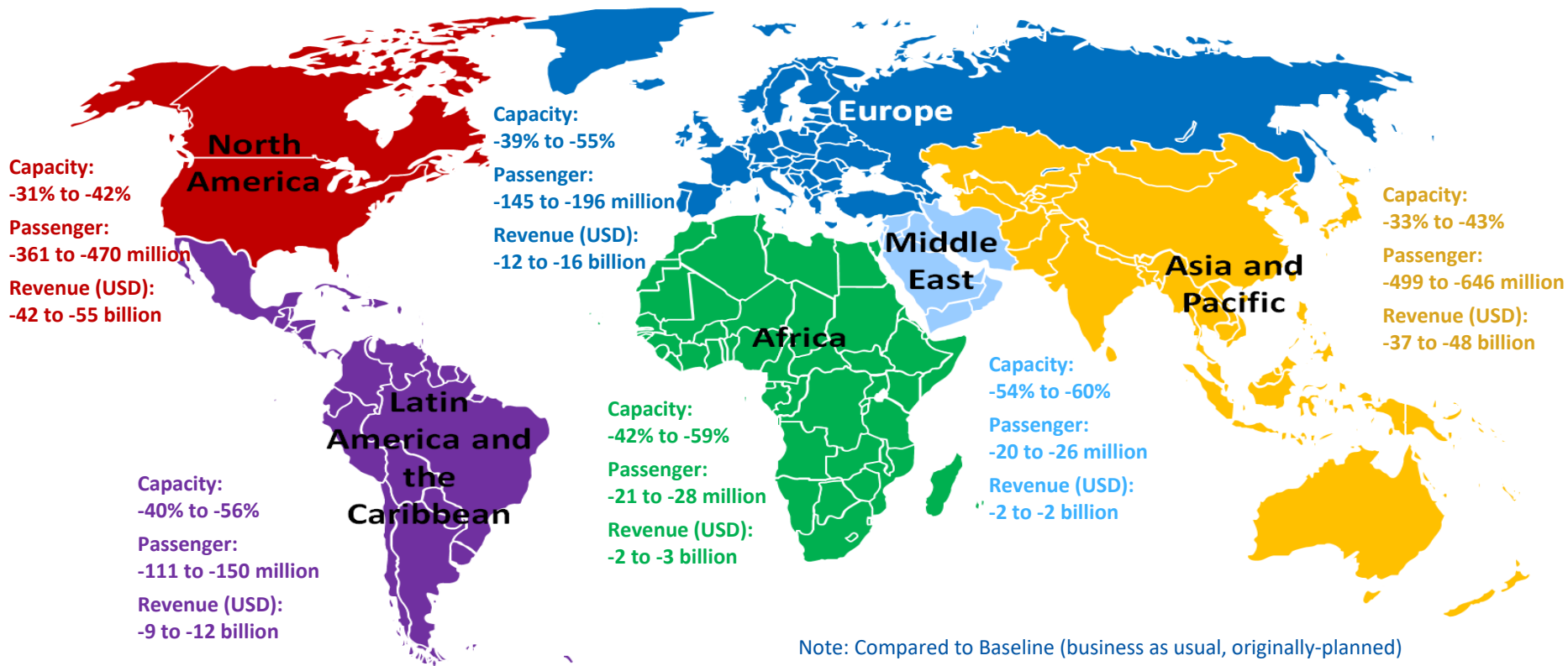
Scenarios for passenger seat capacity compared to Baseline (business as usual)



Estimated impact on international passenger traffic and revenues by region for 2020



Estimated impact on domestic passenger traffic and revenues by region for 2020





Global impact of COVID-19 on aviation, tourism, trade and economy

- **Air passenger traffic**: An overall reduction of air passengers (both international and domestic) ranging from 44% to 59% in 2020 compared to 2019 (by **ICAO**)
- **Airports**: An estimated loss of over 50% of passenger traffic and 57% or over USD 97 billion airport revenues in 2020 compared to business as usual (by **ACI**)
- **Airlines**: A 48% decline of revenue passenger kilometres (RPKs, both international and domestic) in 2020 compared to 2019 (by **IATA**)
- **Tourism**: A decline in international tourism receipts of between USD 910 to 1,170 billion in 2020, compared to the USD 1.5 trillion generated in 2019, with 96% of worldwide destinations having travel restrictions (by **UNWTO**)
- **Trade**: A fall of global merchandise trade volume by between 13% and 32% in 2020 compared to 2019 (by **WTO**)
- **Global economy**: A projected -3% contraction in world GDP in 2020, far worse than during the 2008–09 financial crisis (by **IMF**)



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Scenario Building

- Notwithstanding the elevated uncertainty surrounding the outlook, a scenario analysis could help gauge potential economic implications of the COVID-19 pandemic.
- Scenarios are **not forecasts** of what is most likely to happen. Given rapidly changing circumstances, they are merely indicative of **possible paths or consequential outcomes out of many**.
- The exact path (depth, length and shape) will depend upon various factors, inter alia, duration and magnitude of the outbreak and containment measures, availability of government assistance, consumer confidence, and economic conditions.
- With the situation evolving and more information available, scenarios will be adjusted as necessary.

Analytical Scope and Consideration

Scenarios focus on simultaneous supply shock and drop in demand:

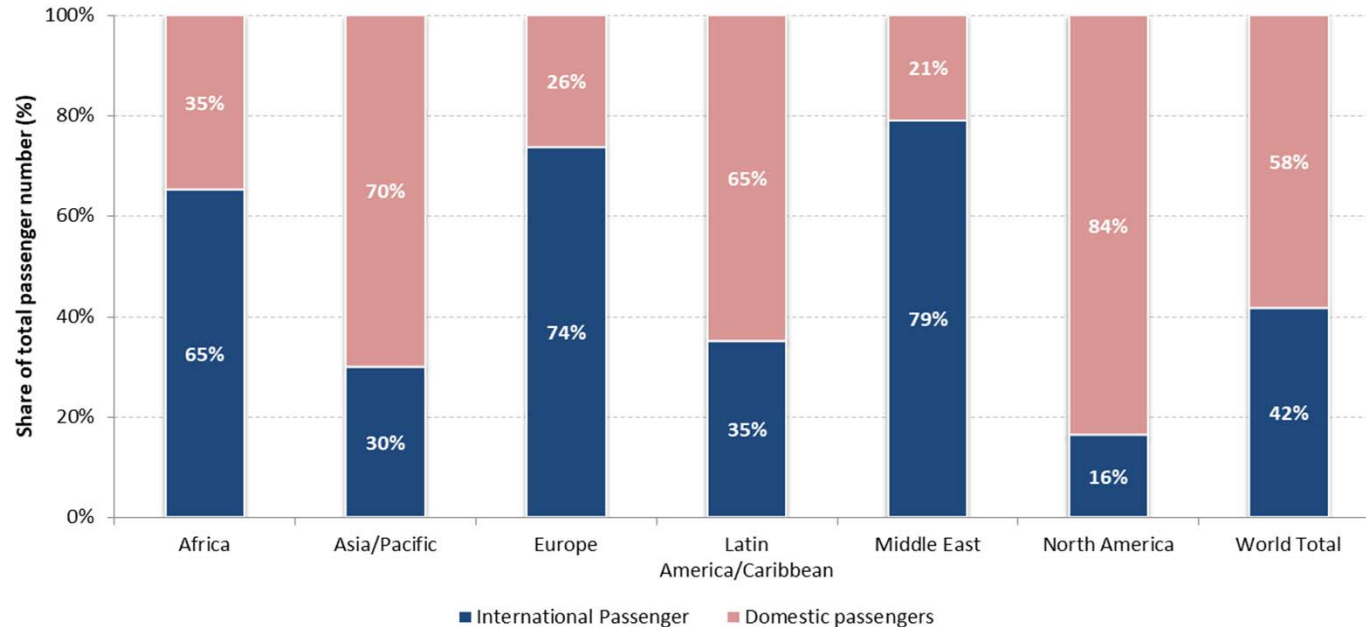
- in a near-term, i.e. monthly profile from **January to December 2020**
- in terms of scheduled **passenger** traffic worldwide

Taking into account the heterogeneity, distinction will be made:

- between International and domestic
- by six (6) geographical region and/or 50 route group used in ICAO's long-term traffic forecasts (LTF)

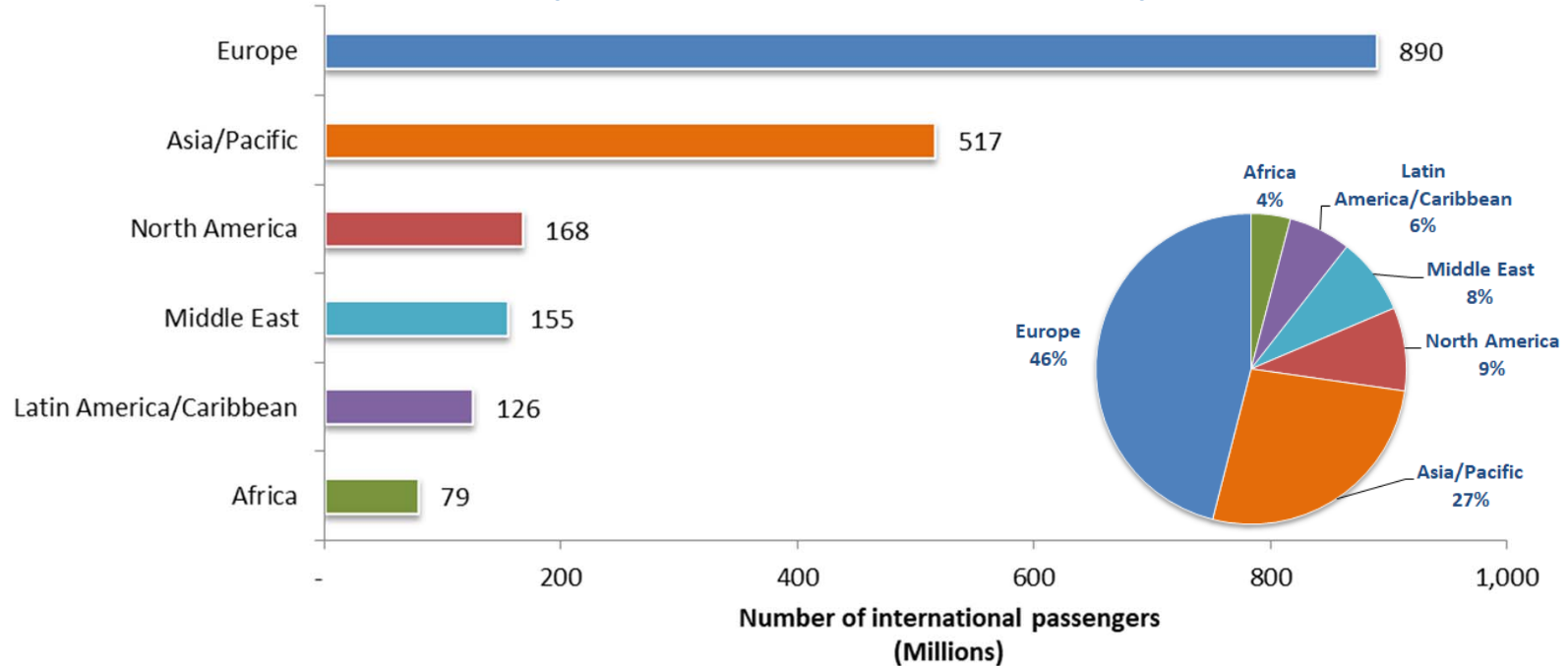
International-domestic passenger traffic mix exhibits significant geographical disparity

Share of domestic-international passenger traffic mix by region (2019)



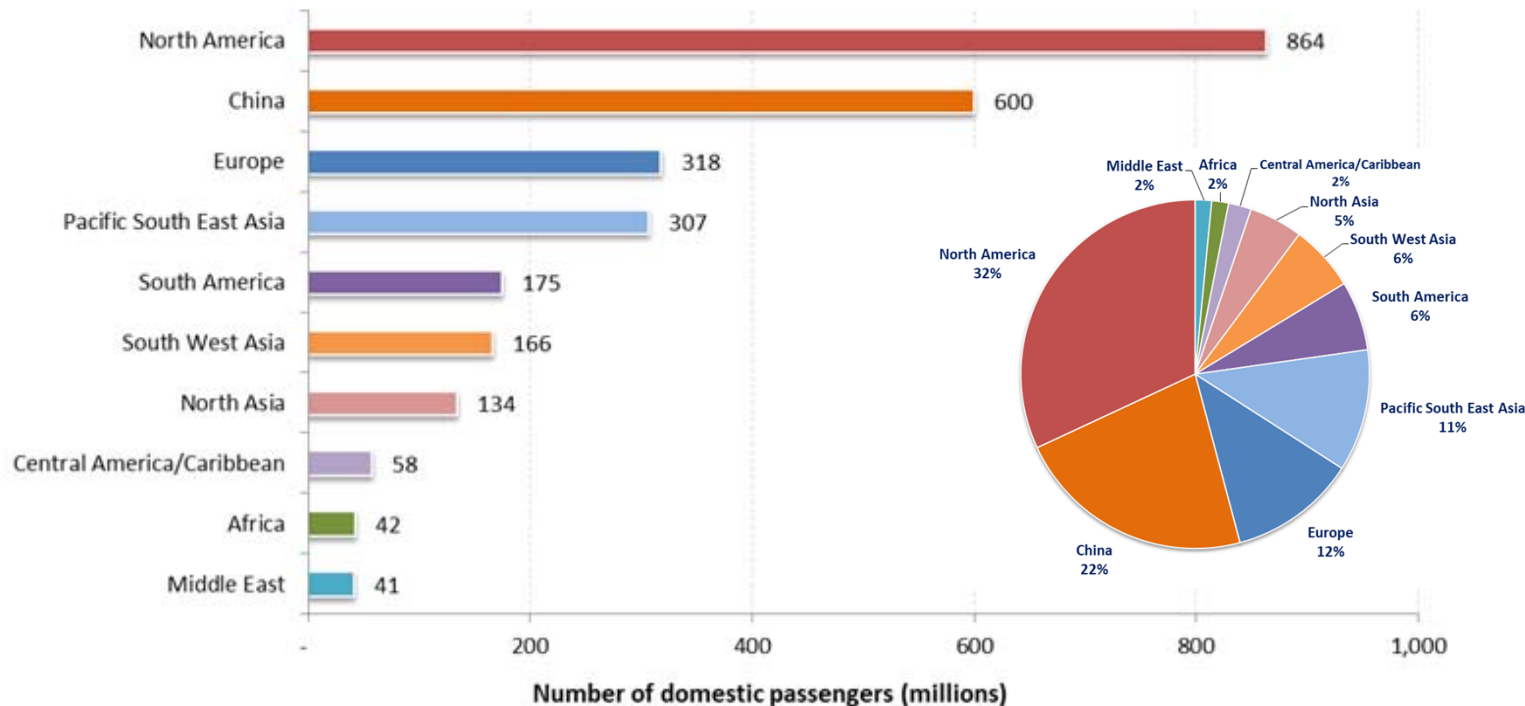
Europe and Asia/Pacific accounted for over 70% of the world international traffic pre-COVID-19

Number of International Passengers by Region (2019, based on from/to State)



North America and China account for over half of world domestic passenger traffic

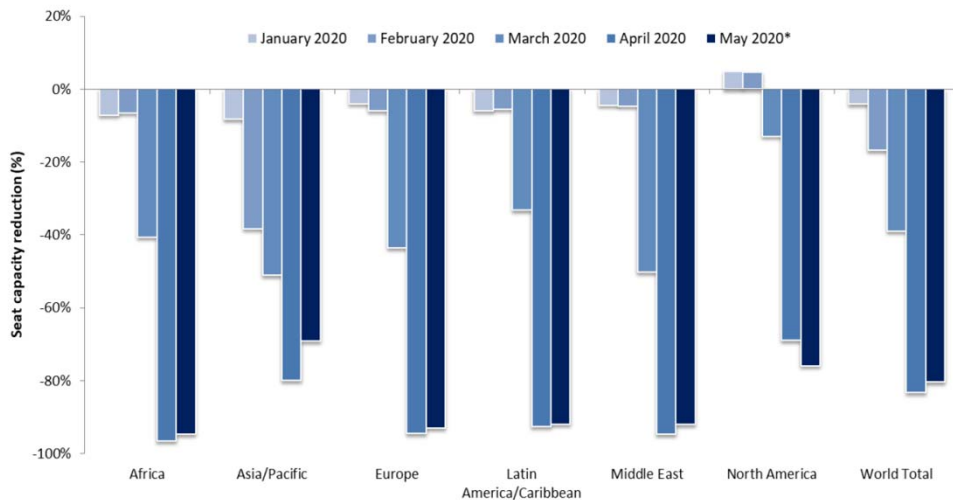
Number of Domestic Passengers by Route Group (2019)



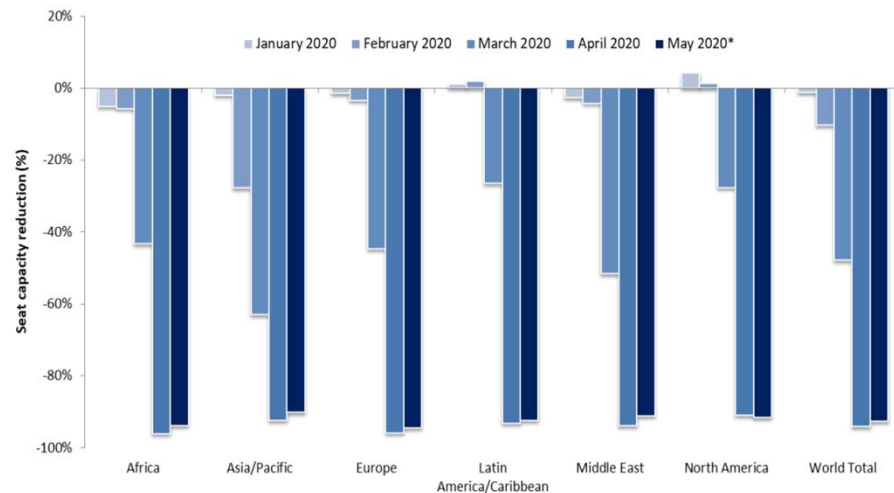
Domestic passenger traffic may be more resilient than international in some markets

Asia/Pacific and North America have experienced 20% to 25% less decline in domestic passenger traffic than international

**Domestic seat capacity reduction
(compared to baseline)**



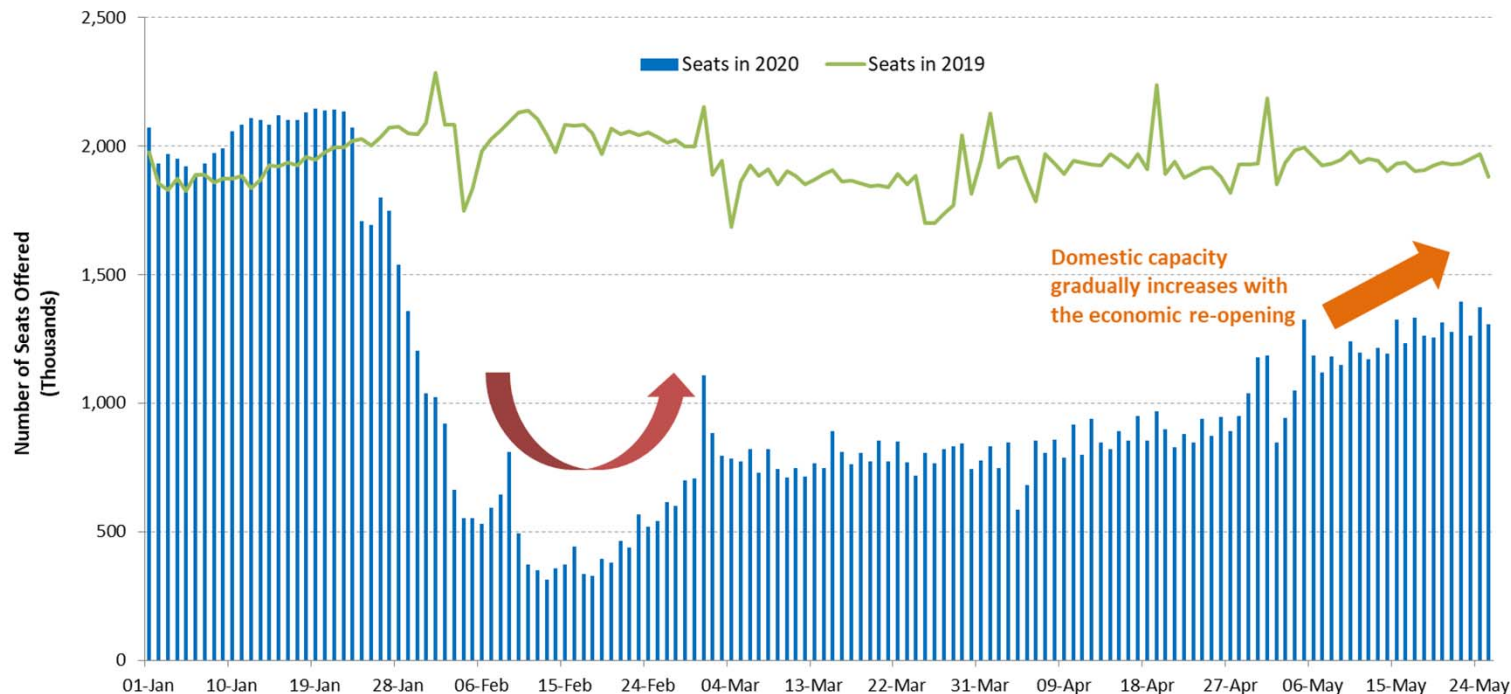
**International seat capacity reduction
(compared to baseline)**



Note: May is estimates (middle range)

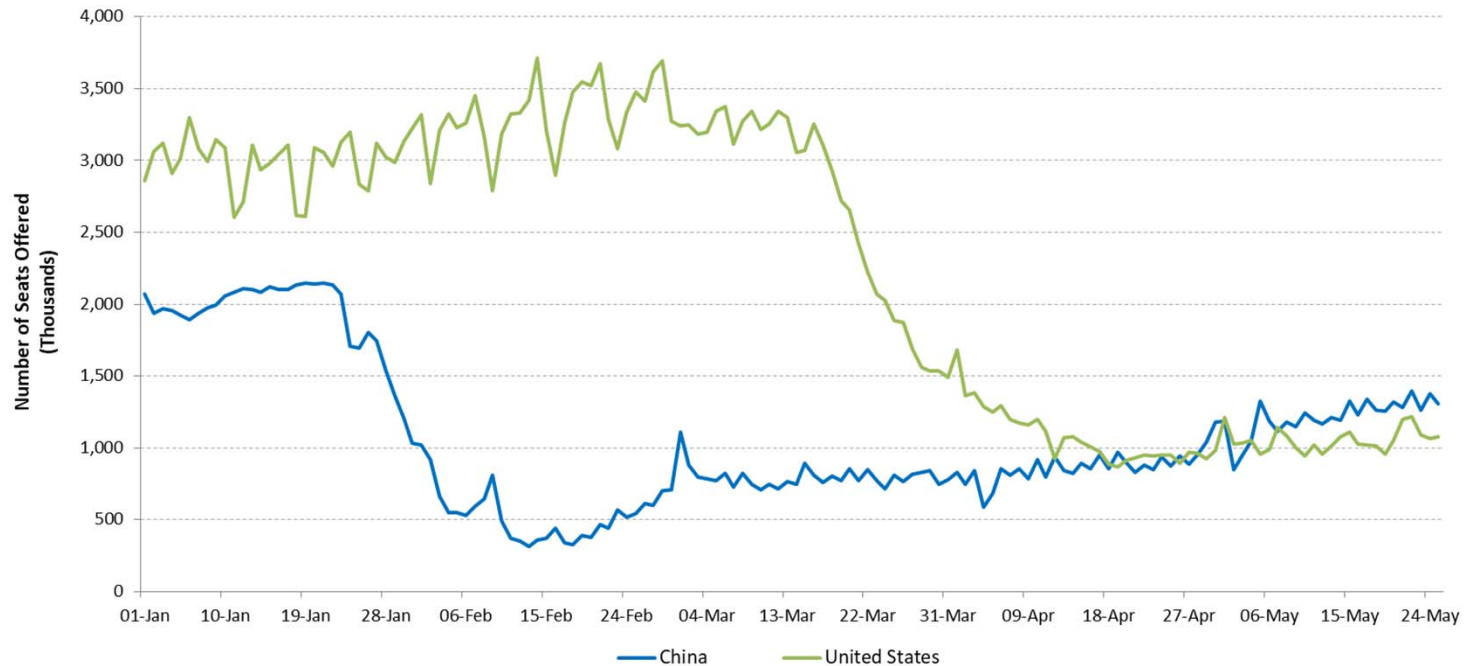
Domestic passenger traffic may recover ahead of international

Domestic passenger traffic in China already bottomed out in mid-February, followed by the slow pace of recovery



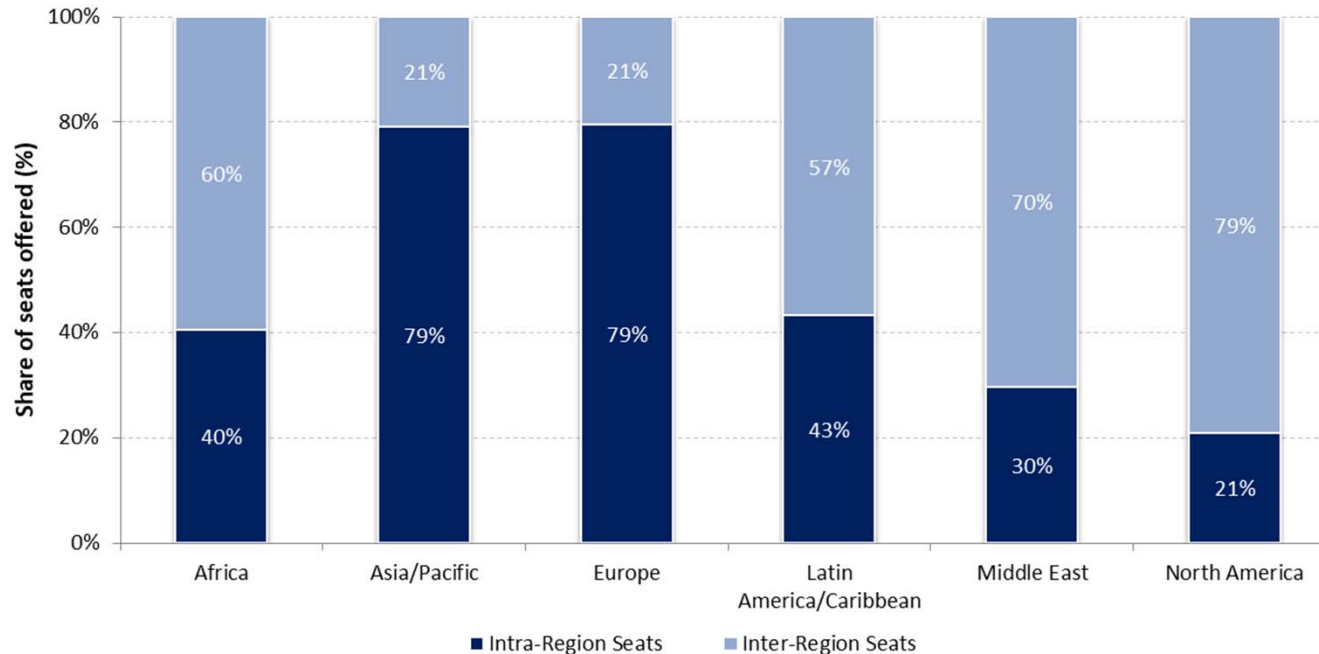
The outbreak timing impacts when traffic would bottom out in each region

Capacity evolution of two largest domestic markets China and United States since January 2020



Regions with higher share of intra-region traffic are expected to recover faster

Almost 80% of international seats offered in Asia/Pacific and Europe were for intra-regional traffic (2019)



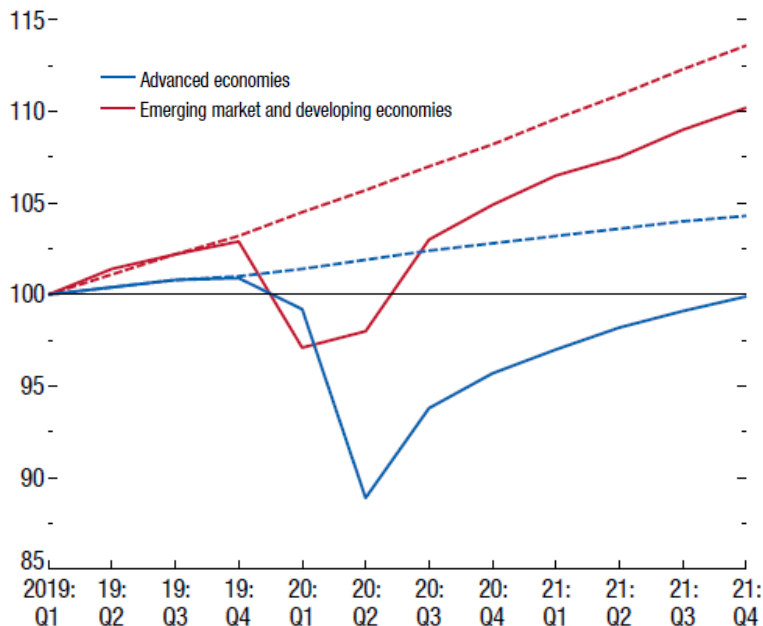
Shapes of Economic Recession and Recovery

Informal classification to describe different types of recessions:

- **V-shaped**: normal shape for recession, a brief period of sharp economic decline followed by quick/smooth recovery
- **U-shaped**: prolonged contraction and muted recovery to trend line growth
- **L-shaped (depression)**: long-term downturn in economic activity, steep drop followed by a flat line with possibility of not returning to trend line growth
- **W-shaped**: a double-dip recession, “down up down up” pattern before full recovery
- **“Nike swoosh”-shaped***: bounce back sharply but blunt quickly (* Brookings Institution/WEF)

What “recession shape” can be assumed given uncertainties surrounding the outlook?

World's GDP Projections (by IMF)



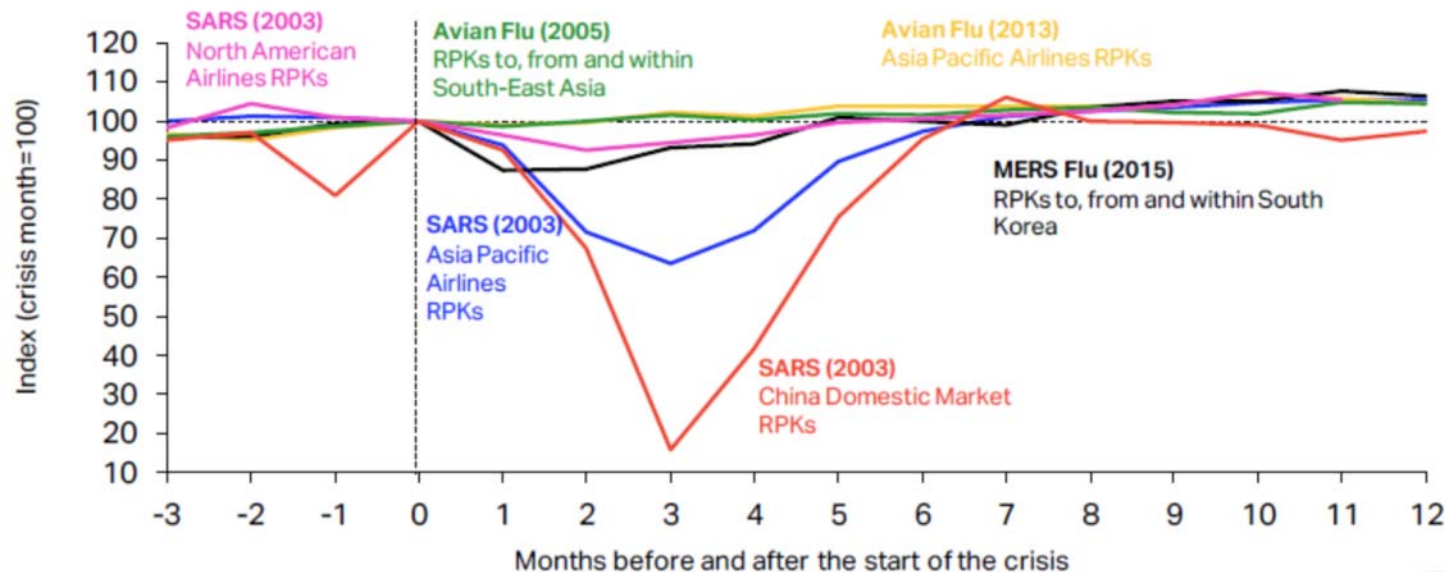
(2019:Q1 = 100; dashed lines indicate estimates from January 2020 World Economic Outlook Update)

<https://www.imf.org/en/Publications/WEO/Issues/2020/04/14/weo-april-2020>

- How long will the pandemic last and what will be the severity levels?
- How deep and how long will the global recession be?
- How long will lockdowns and travel restrictions continue?
- How fast will consumer confidence in air travel be restored?
- Will there be a structural shift in industry and consumers' behaviors?
- How long can the air transport industry withstand the financial adversity?

Previous outbreaks/pandemics had a V-shaped impact on air transport in Asia/Pacific

Impact of past disease outbreaks on aviation



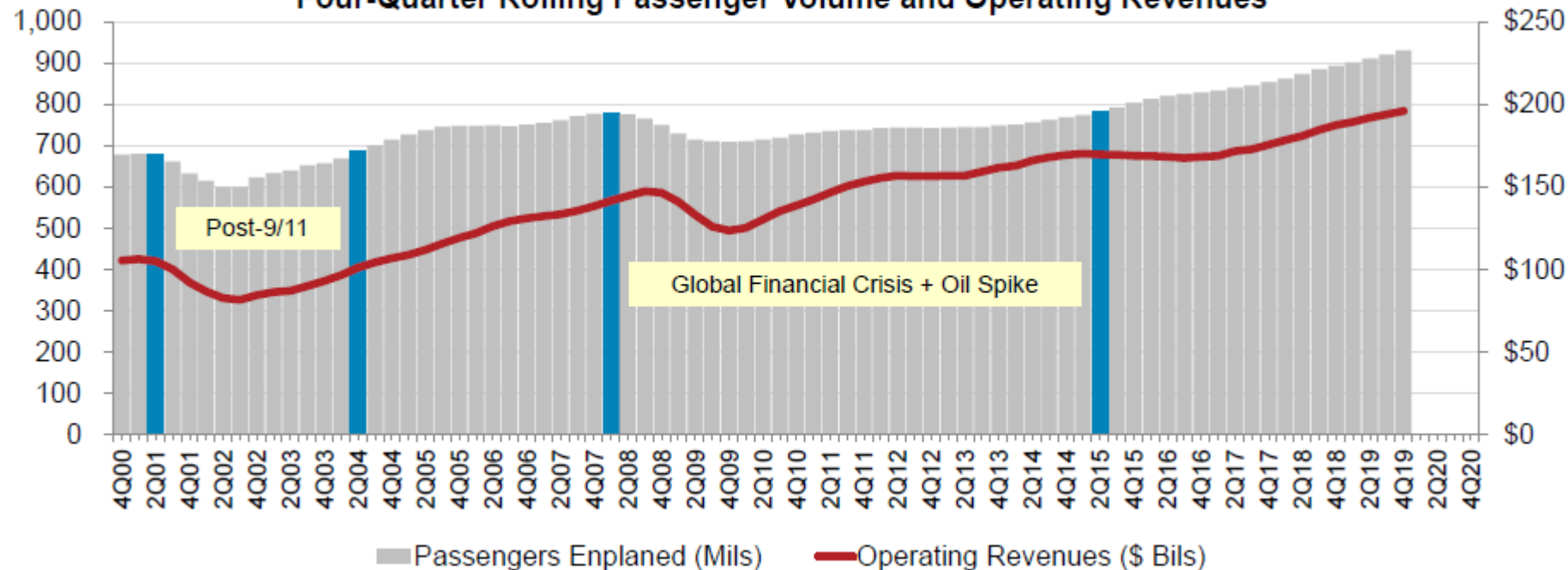
The impact of COVID-19 has already surpassed the 2003 SARS outbreak which had resulted in reduction of annual RPKs by 8% and USD 6 billion revenues for Asia/Pacific airlines. **The 6-month recovery path of SARS might not apply to today's situation.**

Source: IATA Economics using data from IATA Statistics

<https://www.iata.org/en/iata-repository/publications/economic-reports/third-impact-assessment/>

9/11 and global financial crisis had a U/L-shaped impact on air transport in United States

Four-Quarter Rolling Passenger Volume and Operating Revenues



* Passengers enplaned systemwide on U.S. airlines in scheduled and nonscheduled services

Source: A4A Passenger Airline Cost Index and Bureau of Transportation Statistics (Form 41 Schedule T1)

<https://www.airlines.org/dataset/impact-of-covid19-data-updates/>

Indicative Scenarios and Paths Forward

As overall severity and duration of the COVID-19 pandemic are still uncertain, four (4) different recovery paths under two (2) indicative scenarios are developed:

- **Baseline:** counterfactual scenario, in which the COVID-19 pandemic does not occur, that is, **originally-planned** or **business as usual**
- **Scenario 1:** two (2) different paths (similar to **Nike swoosh- and W-shaped**)
- **Scenario 2:** two (2) different paths (similar to **U- and L-shaped**)
- **Reference:** based on latest airline schedules (similar to **V-shaped**)

- Separate scenarios/paths are developed for international and domestic traffic
 - Each of the 2 scenarios has 2 different paths, which are differentiated in terms of supply (output) and demand (spending), mainly: a) the scale of seat capacity decline and timing of recovery and b) the degree of consumer confidence in air travel that can be translated into demand or load factor as a proxy
 - In the following analysis, international and domestic scenarios having the same path number are linked with each other, although different combination of scenarios/paths would be possible
- Scenario assumptions (**Appendix B**) include:
 - Different timing and speed of recovery by region, international/domestic, and intra-/inter-region
 - Impact of global economic contraction on air passenger demand
- No consideration is made to social distancing requirements on aircraft, etc.

- **Baseline (counterfactual, no COVID-19 pandemic)**
 - Originally-planned or business as usual: trend line growth from 2019 level
- **Scenario 1 (“Nike swoosh”- and W-shaped)**
 - **Path 1:** Smooth capacity recovery to 80% of Baseline level by December with pent-up demand
 - **Path 1a:** Capacity to start with smooth recovery but then turn back down due to over-capacity
- **Scenario 2 (U- and L-shaped)**
 - **Path 2:** Slow progression of capacity recovery to 60%, picking up more demand in 4Q
 - **Path 2a:** Recovery to 40% at diminishing speed due to respite and continuous demand slump
- **Reference (V-shaped, based on the latest airlines schedules)**
 - **Currently-planned:** Weekly changes (some airlines have not yet filed 4Q schedules)

- **Baseline (counterfactual, no COVID-19 pandemic)**
 - Originally-planned or business as usual: trend line growth from 2019 level
- **Scenario 1 (“Nike swoosh”- and W-shaped)**
 - **Path 1:** Swift capacity rebound to 93% of Baseline by December pushed by pent-up demand
 - **Path 1a:** Capacity to start with smooth recovery but then turn back down due to over-capacity
- **Scenario 2 (U- and L-shaped)**
 - **Path 2:** Gradual capacity recovery to 80%, picking up more demand in 4Q
 - **Path 2a:** Capacity recovery to 60% at diminishing speed due to sluggish demand growth
- **Reference (V-shaped, based on the latest schedules filed by airlines)**
 - **Currently-planned:** Weekly changes (some airlines have not yet filed 4Q schedules)

Scenario Analysis

Previous two (2) scenarios and six (6) different paths were restructured with new two (2) scenarios and four (4) different paths.

Figures and estimates herein are subject to substantial changes, and will be updated with the situation evolving and more information available.

- Three (3) key impact indicators under four (4) paths of two (2) scenarios:
 - Impact on passenger seat capacity (supply, % change)
 - Impact on passenger numbers (demand)
 - Impact on gross passenger operating revenues of airlines
- Comparison to:
 - Baseline scenario
 - 2019 level (year-on-year)
 - Reference scenario
- Break-down by:
 - International and domestic
 - Six (6) geographical regions

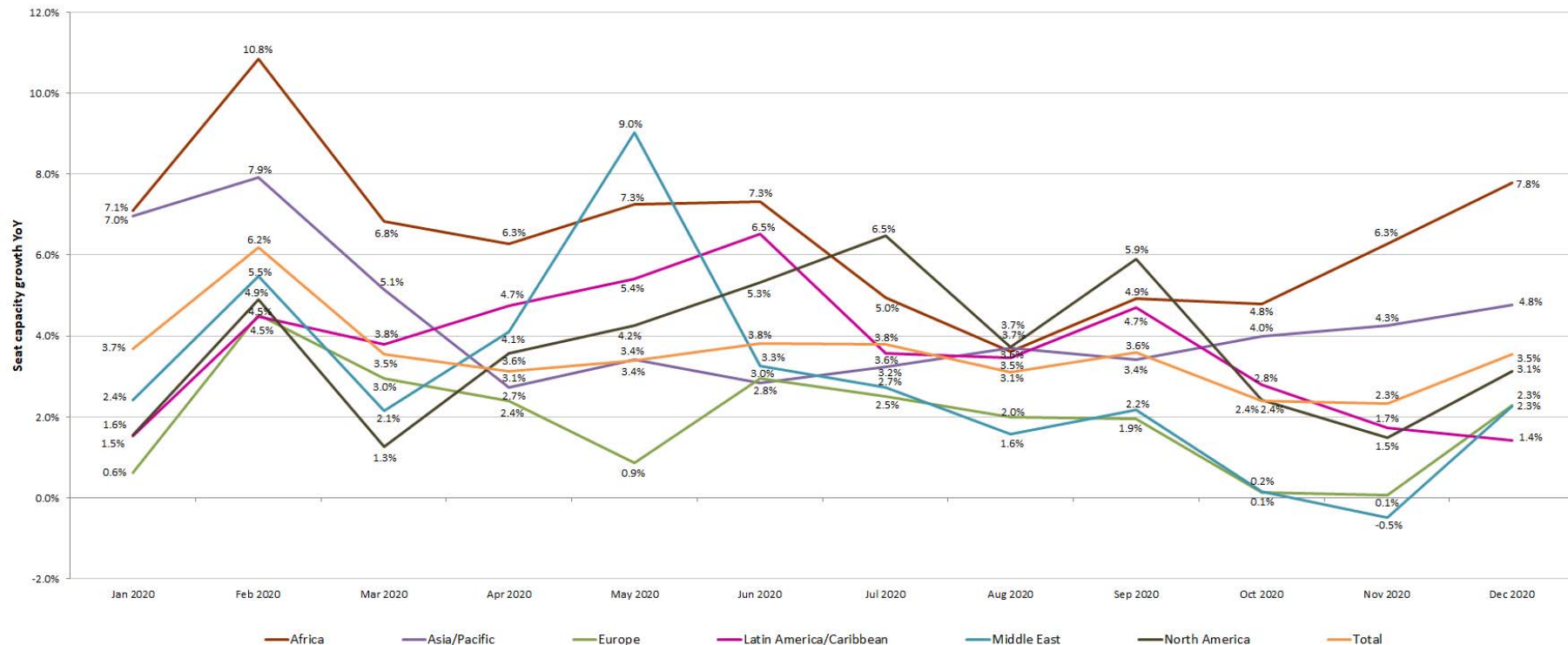
Estimated actual results are used for the key impact indicators from January to May 2020.

Appendix C details the key impact indicators while **Appendix D** presents the estimated actual results by route group.

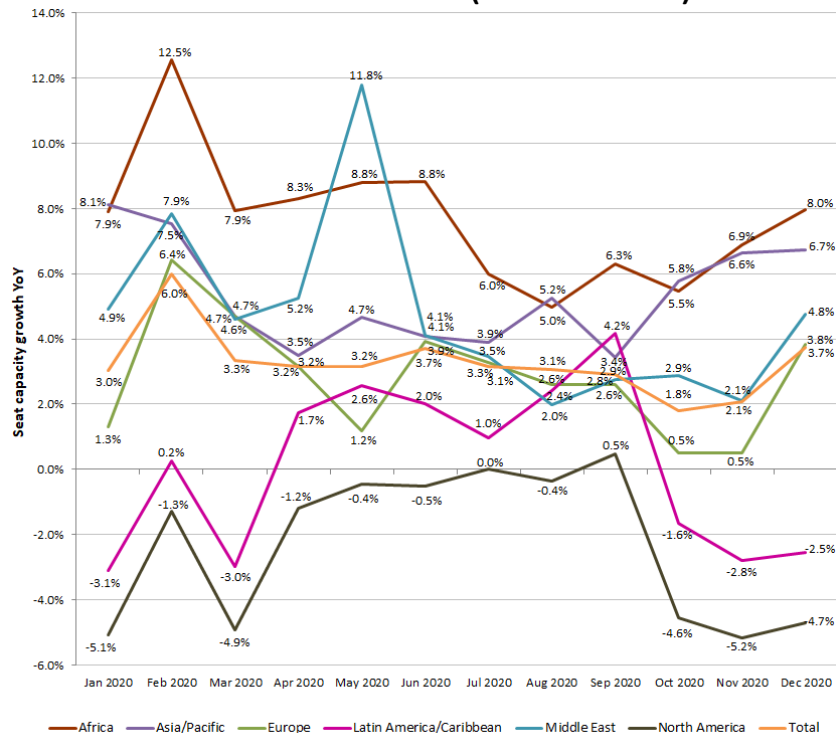
Impact on Passenger Seat Capacity (Supply)

- Prior to the outbreak, airlines had planned to increase seat capacity in 2020 by **3.5%** (international by **3.2%** and domestic by **3.7%**), compared to 2019.
- According to the latest estimates, passenger seat capacity could instead drop from the above Baseline by **40% to 53%** (international by **48% to 63%** and domestic by **34% to 45%**).
- This capacity level would be **38% to 51%** (international **46% to 62%** and domestic **31% to 43%**) below the 2019 level.
- Biggest capacity reduction (%) is expected to be in Middle East, followed by Africa and Europe.

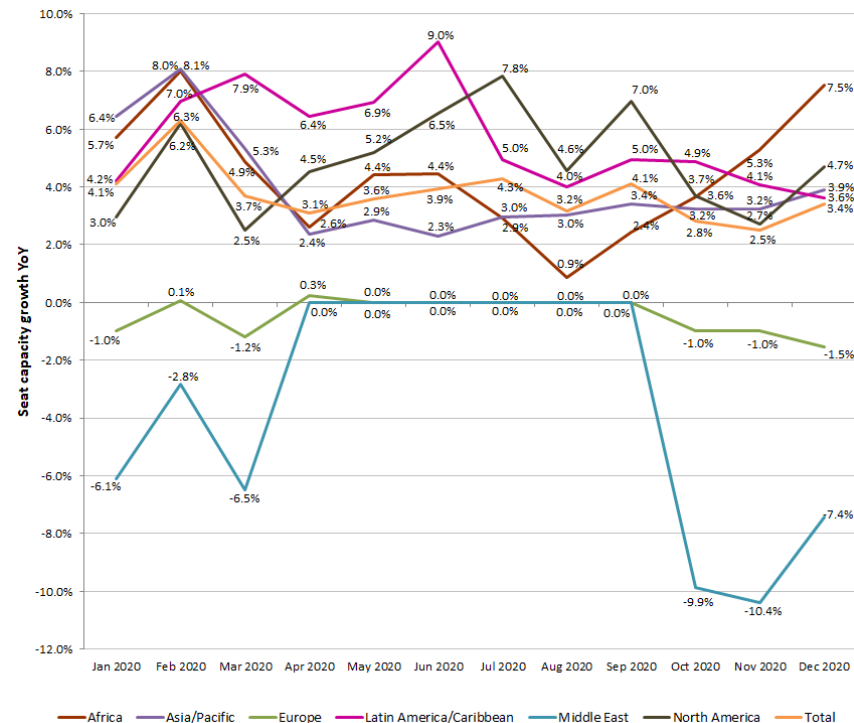
International + Domestic (+3.5% YoY)



International (+3.2% YoY)

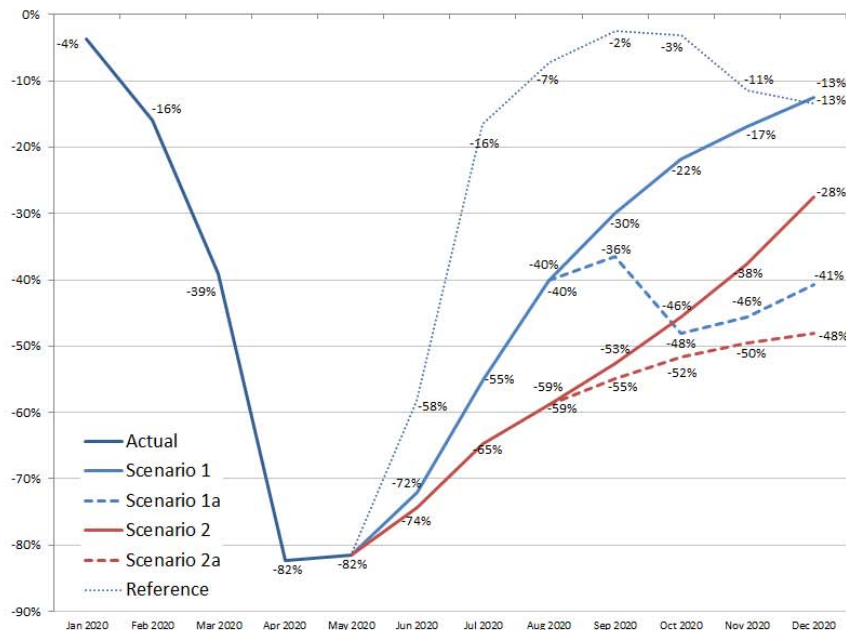


Domestic (+3.7% YoY)

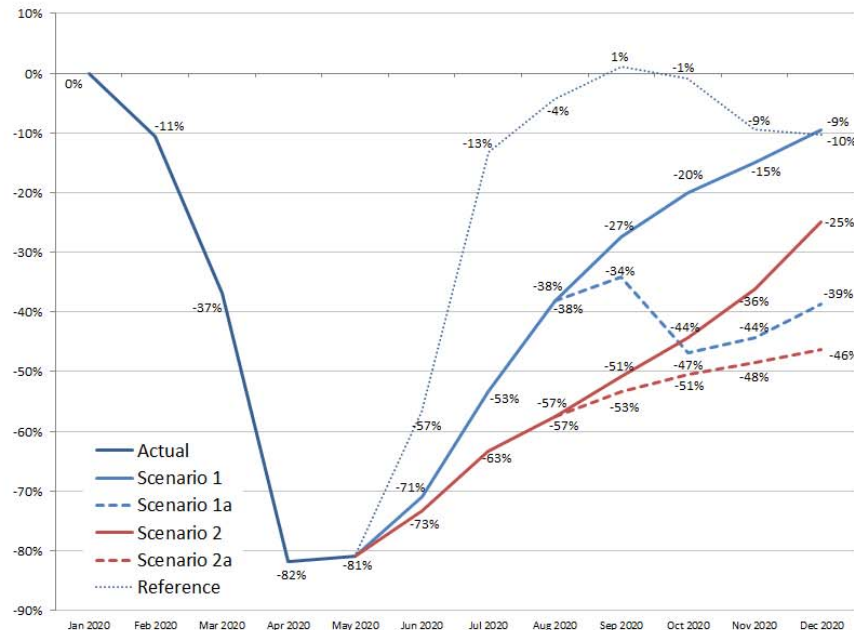


Scenarios 1 & 2 (World total): Seat capacity change compared to Baseline & 2019

International + Domestic (-40% to -53% from Baseline)

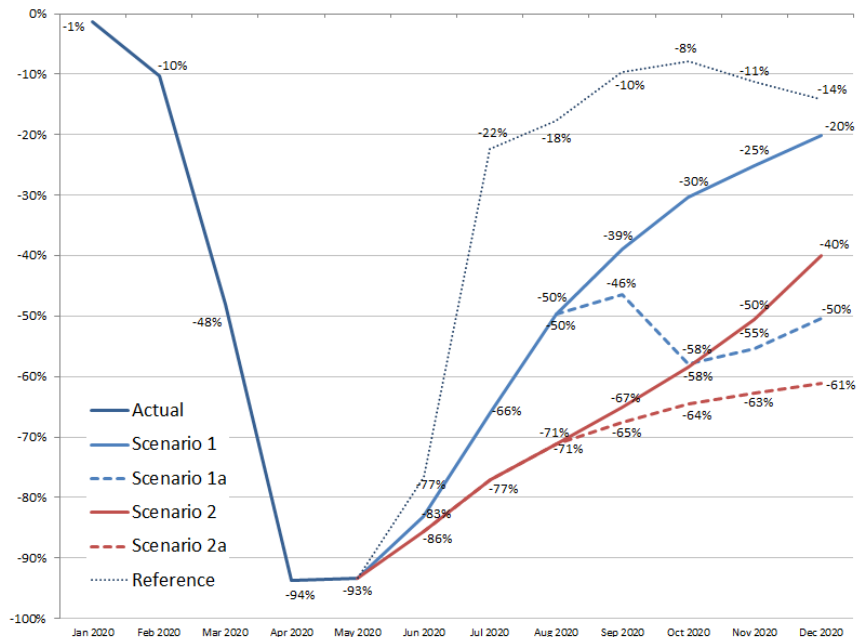


International + Domestic (-38% to -51% YoY from 2019)

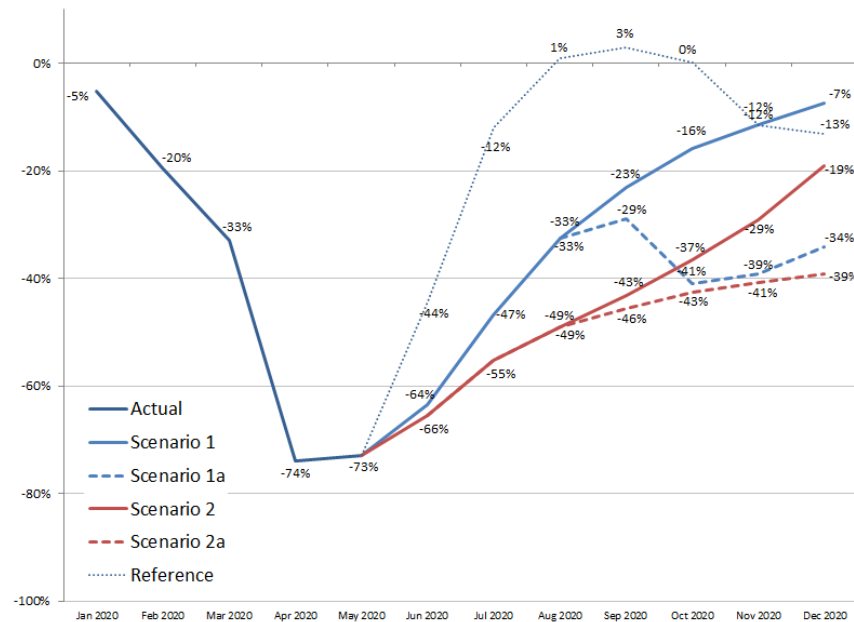


Scenarios 1 & 2 (World total): Seat capacity change compared to Baseline

International (-48% to -63%)

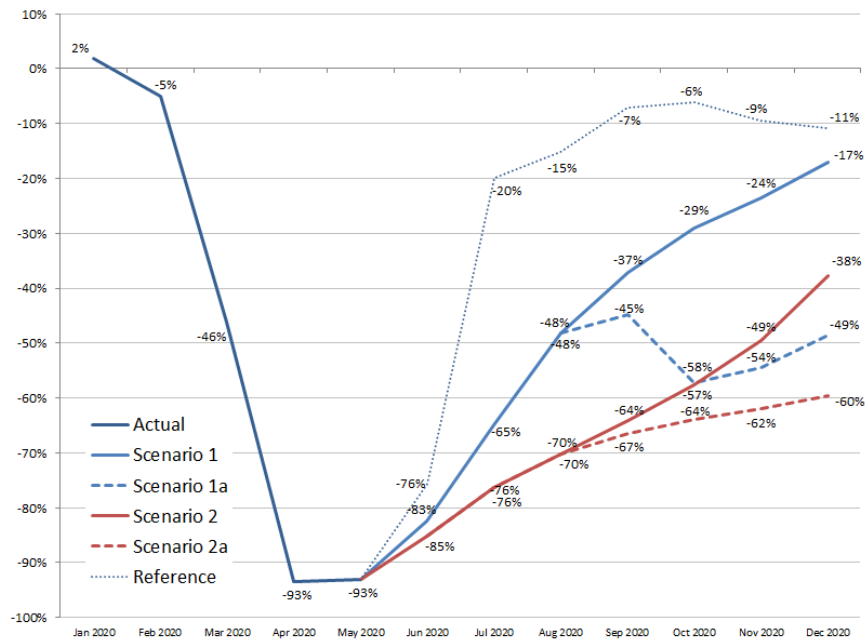


Domestic (-34% to -45%)

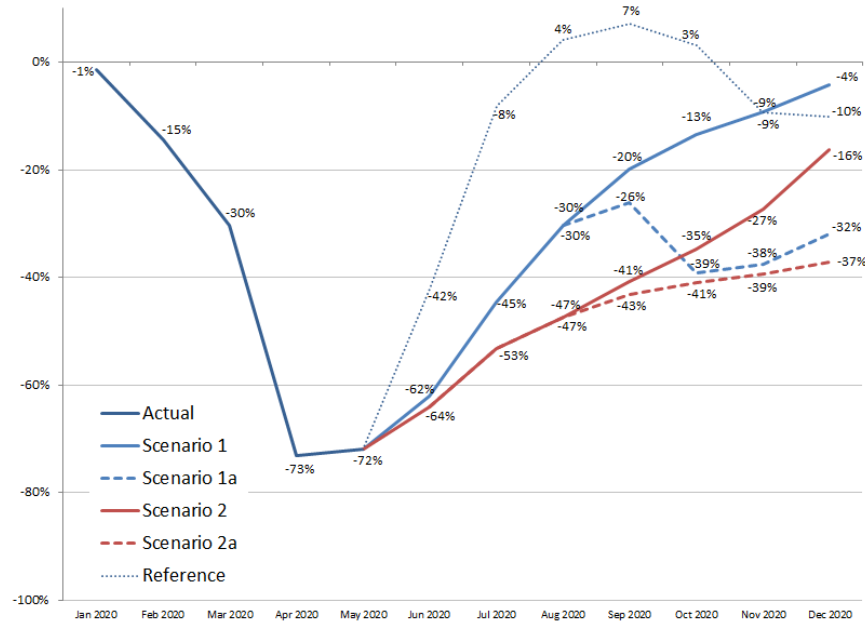


Scenarios 1 & 2 (World total): Seat capacity change compared to 2019

International (-46% to -62% YoY)

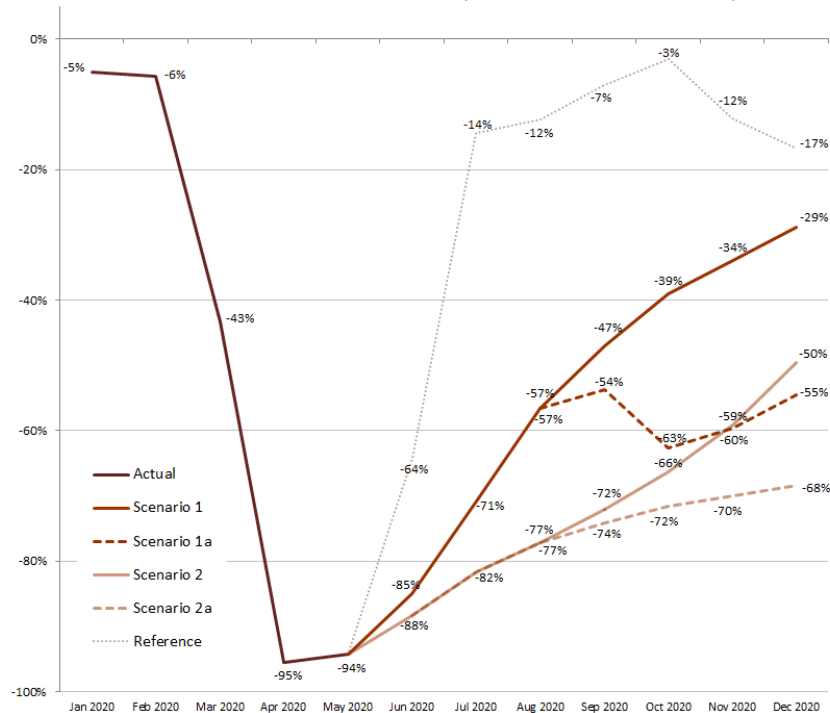


Domestic (-31% to -43% YoY)

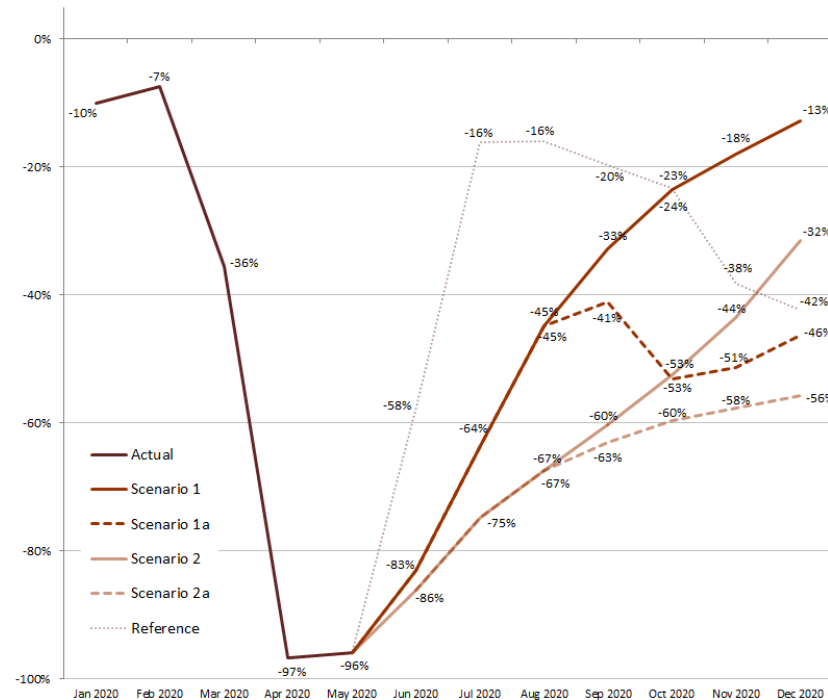


Scenarios 1 & 2 (Africa): Seat capacity change compared to Baseline

International (-51% to -65%)

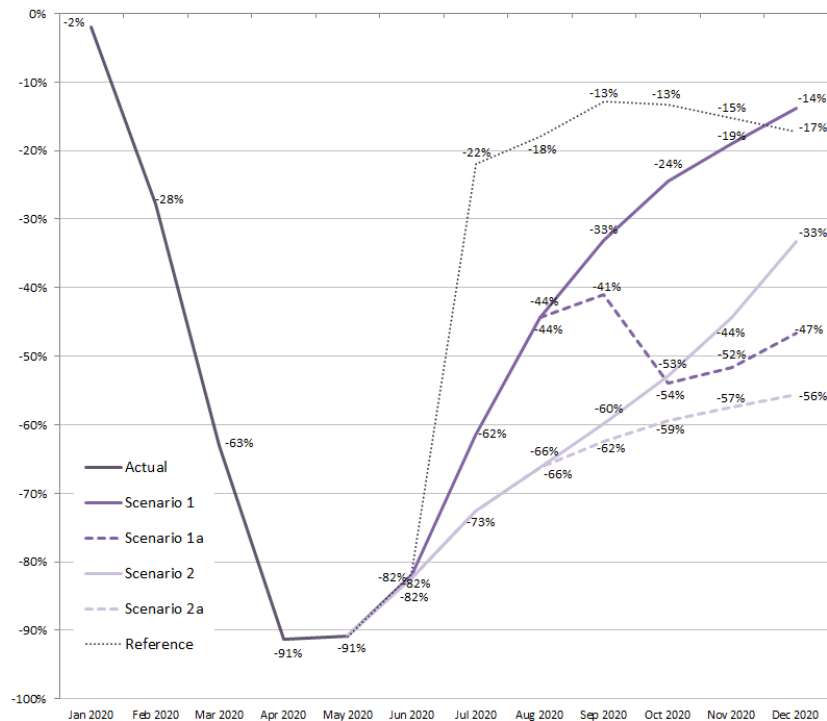


Domestic (-42% to -59%)

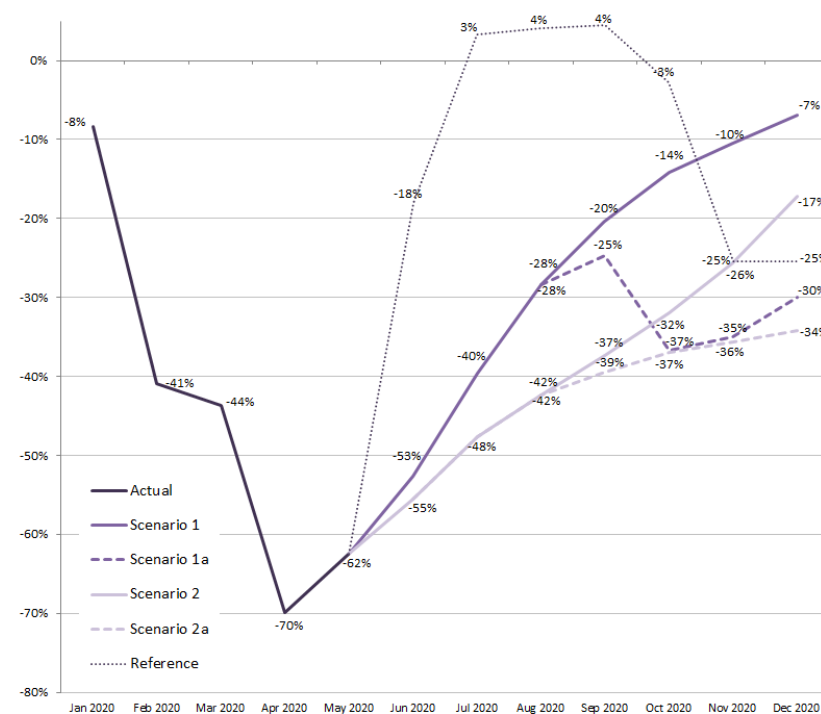


Scenarios 1 & 2 (Asia/Pacific): Seat capacity change compared to Baseline

International (-46% to -61%)

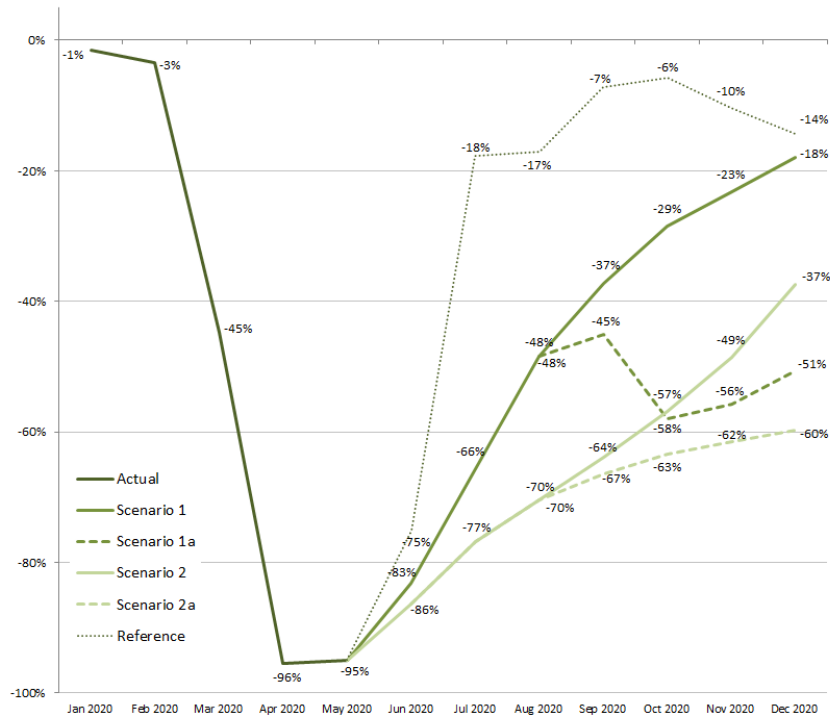


Domestic (-33% to -43%)

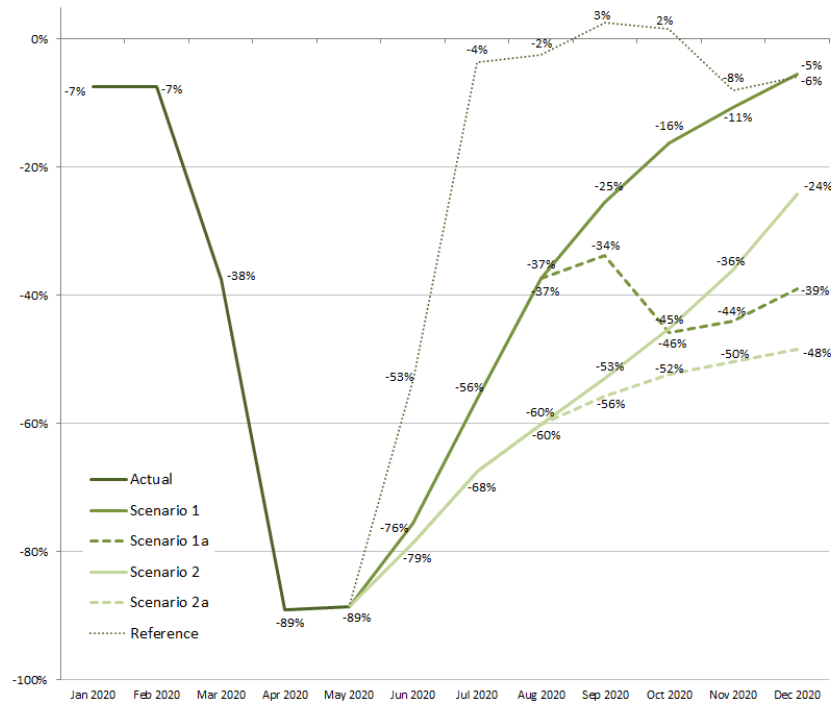


Scenarios 1 & 2 (Europe): Seat capacity change compared to Baseline

International (-49% to -64%)

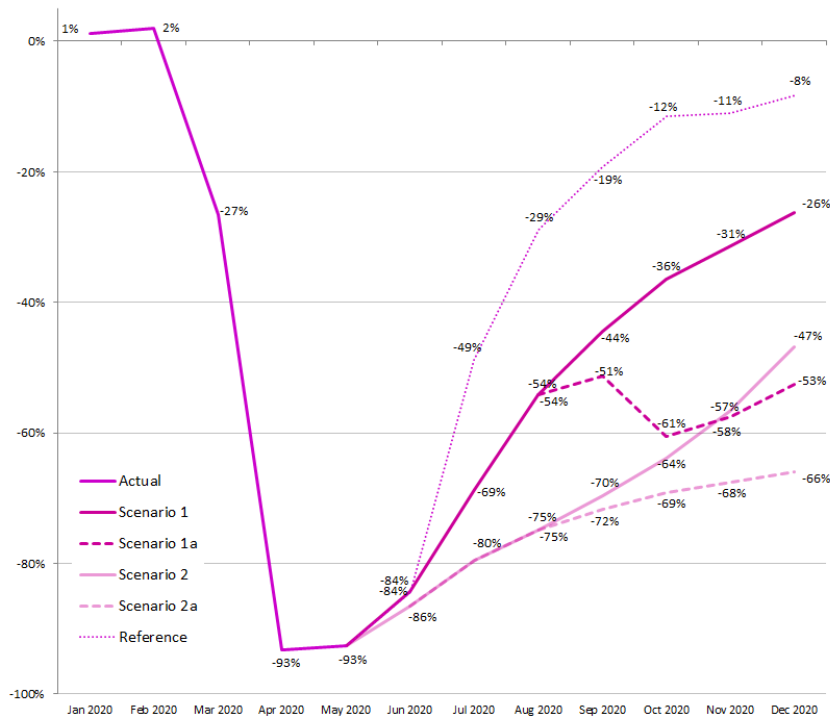


Domestic (-39% to -55%)

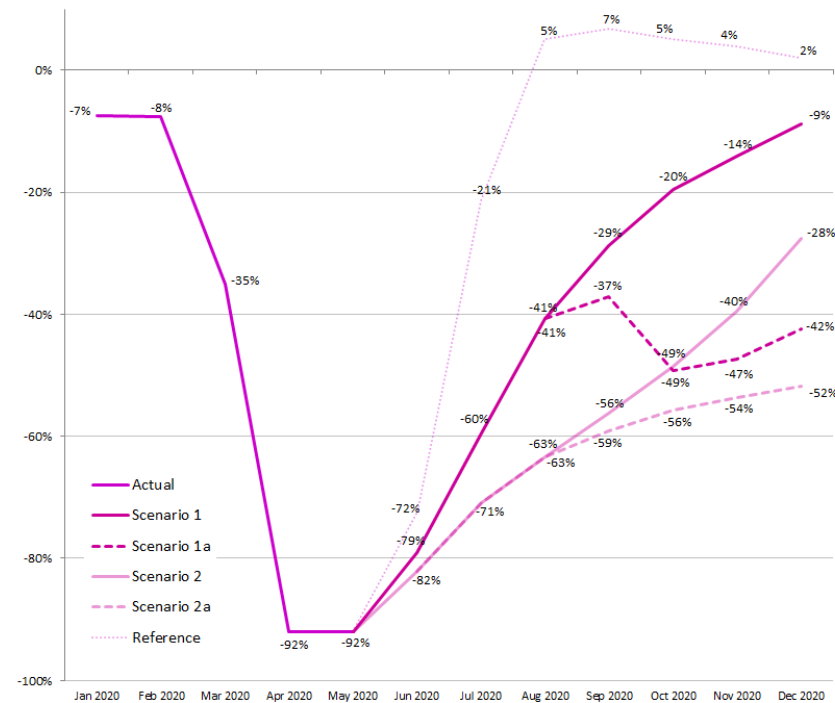


Scenarios 1 & 2 (Latina America/Caribbean): Seat capacity change compared to Baseline

International (-46% to -60%)

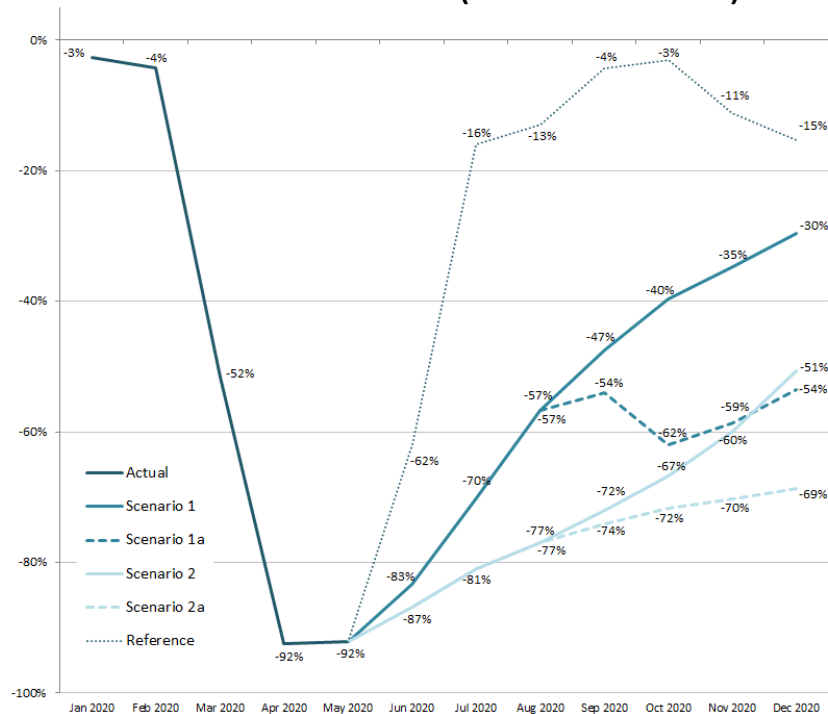


Domestic (-40% to -56%)

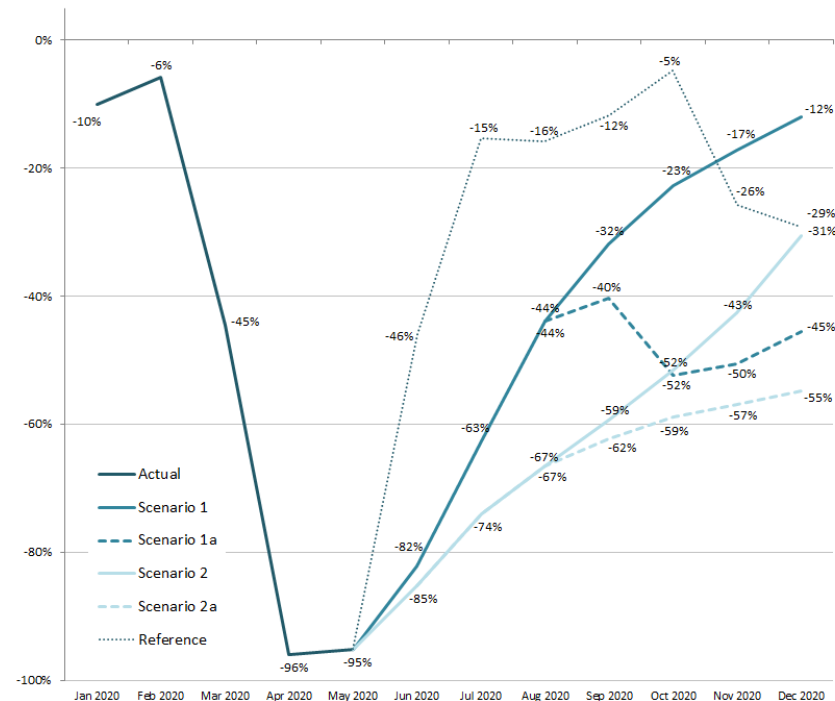


Scenarios 1 & 2 (Middle East): Seat capacity change compared to Baseline

International (-51% to -65%)

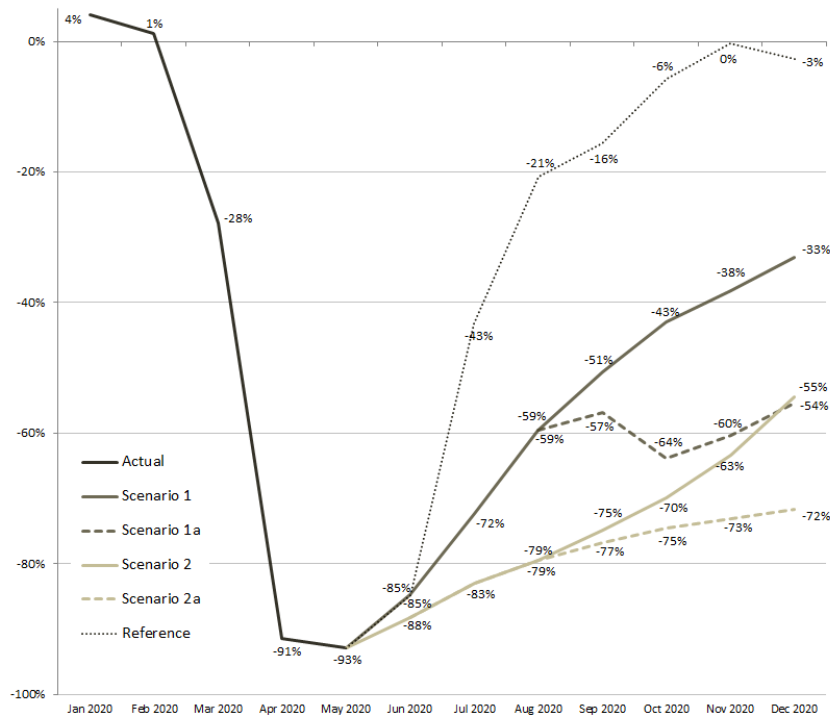


Domestic (-45% to -60%)

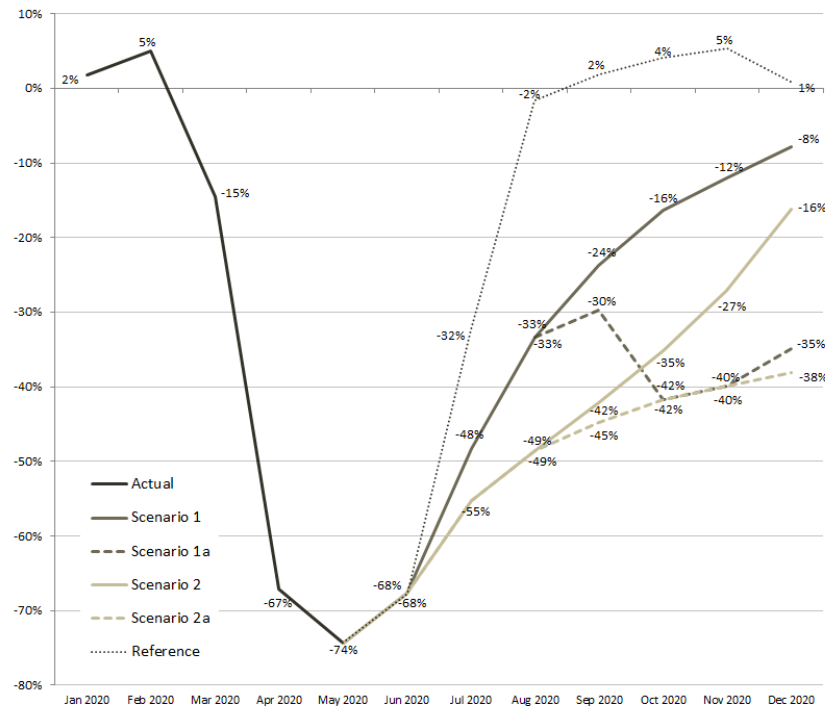


Scenarios 1 & 2 (North America): Seat capacity change compared to Baseline

International (-51% to -64%)



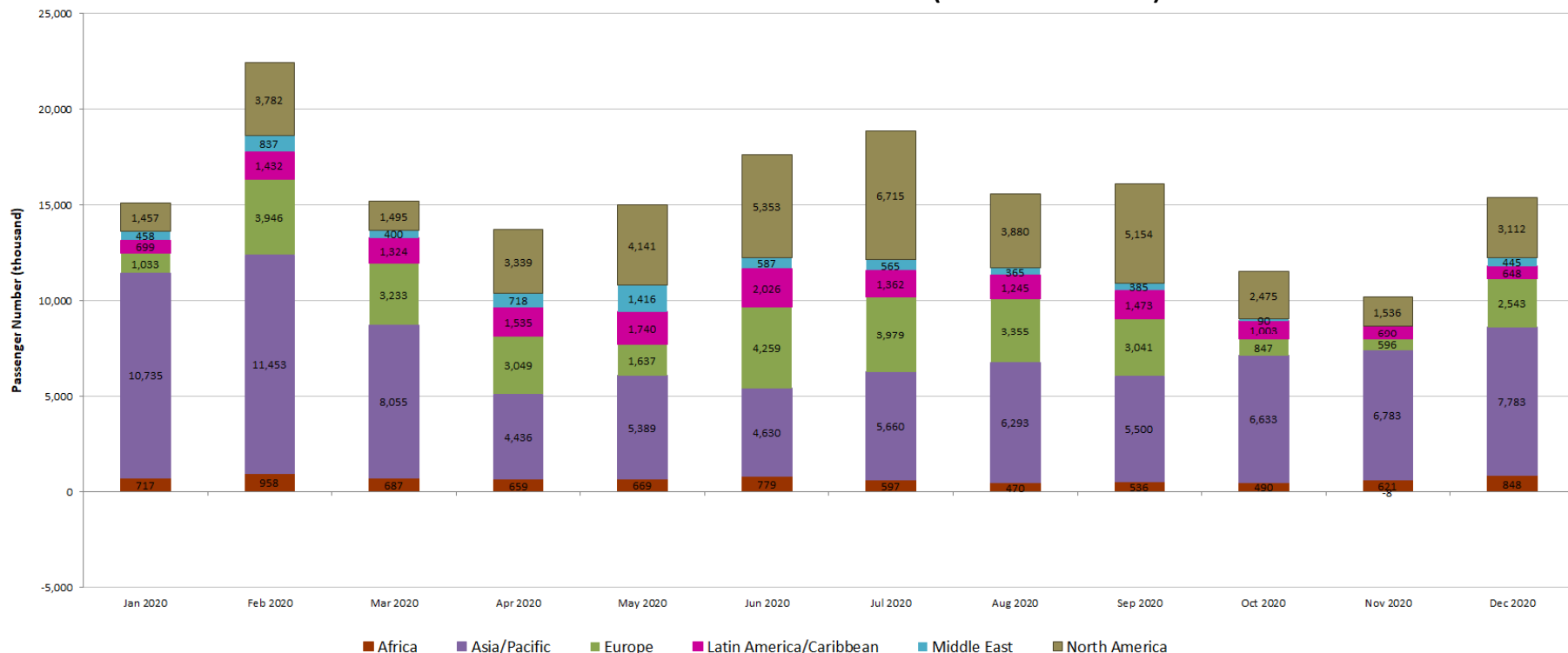
Domestic (-31% to -42%)



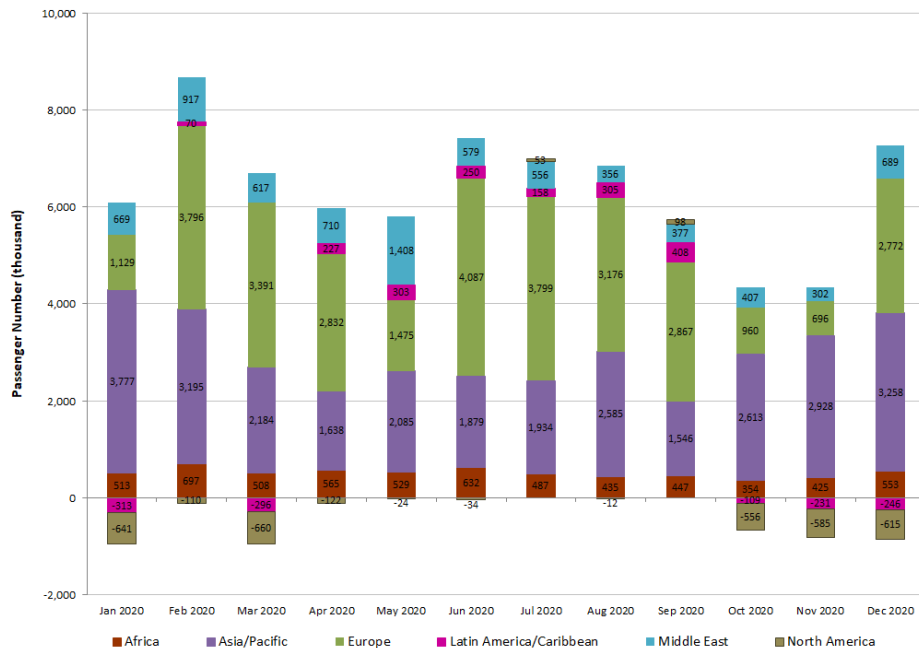
Impact on Passenger Numbers (Demand)

- Given the originally-planned seat capacity, passenger demand could have increased **187 million** for 2020 (international **72 million** and domestic **115 million**), compared to 2019.
- According to the latest estimates, passenger demand could instead drop from the above Baseline by **2,247 to 2,915 million** (international by **1,091 to 1,399 million** and domestic by **1,156 to 1,516 million**).
- This demand level would be **2,061 to 2,728 million** (international by **1,019 to 1,327 million** and domestic by **1,041 to 1,401 million**) below the 2019 level.
- The most substantial demand reduction (in total number) is expected to be in Asia/Pacific, followed by Europe, hitting its summer travel peak season.

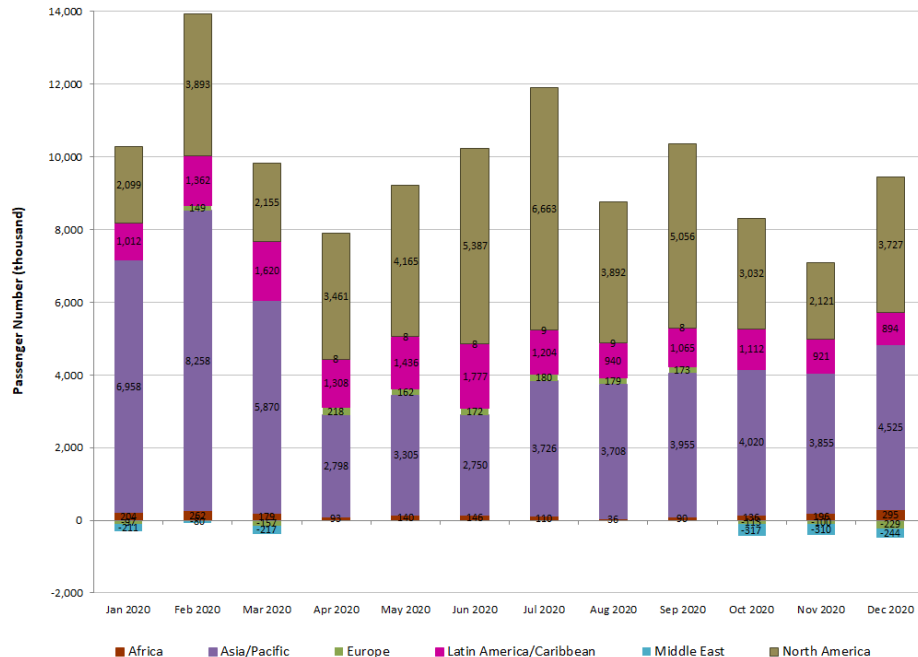
International + Domestic (+187 million)



International (+72 million)



Domestic (+115 million)

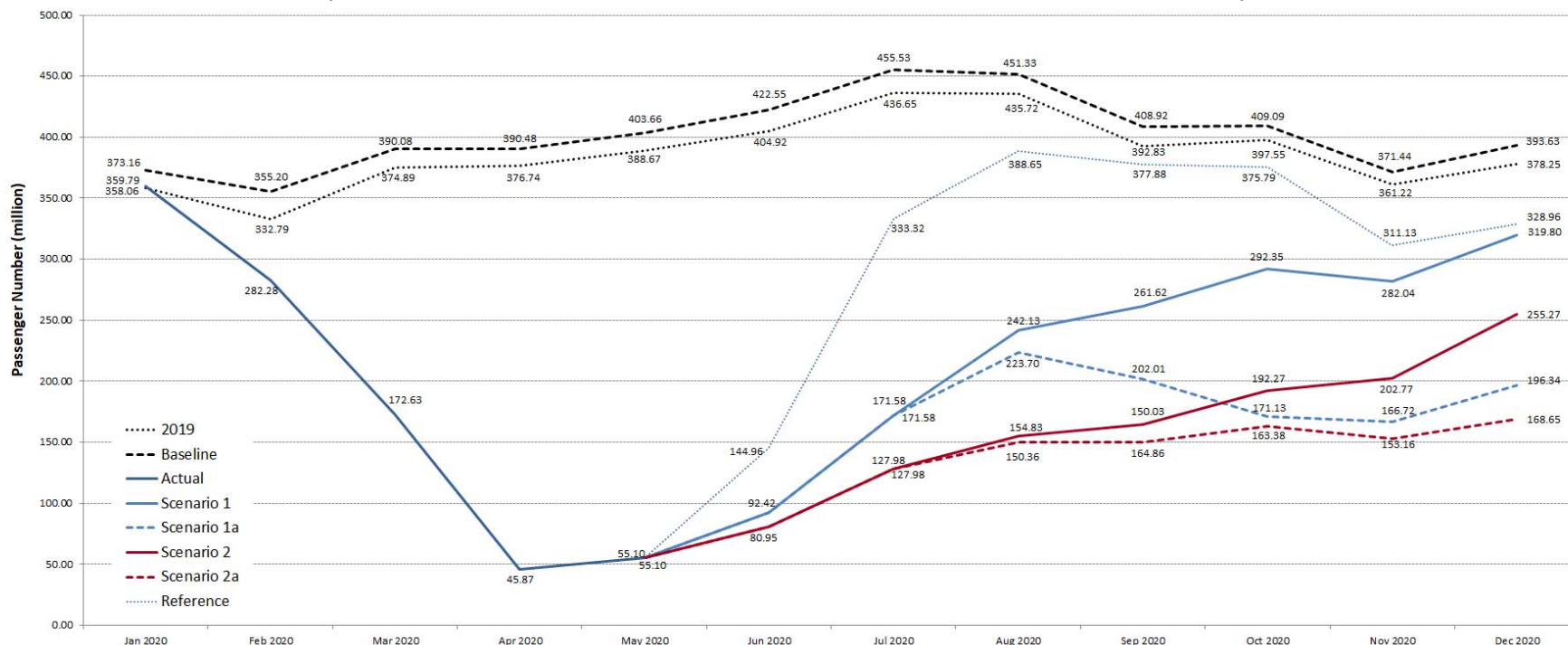


Note: Number of international passengers departing from each country and territory, which are aggregated at the regional level to avoid double counting

Scenarios 1 & 2 (World total): Passenger numbers compared to Baseline & 2019

International + Domestic

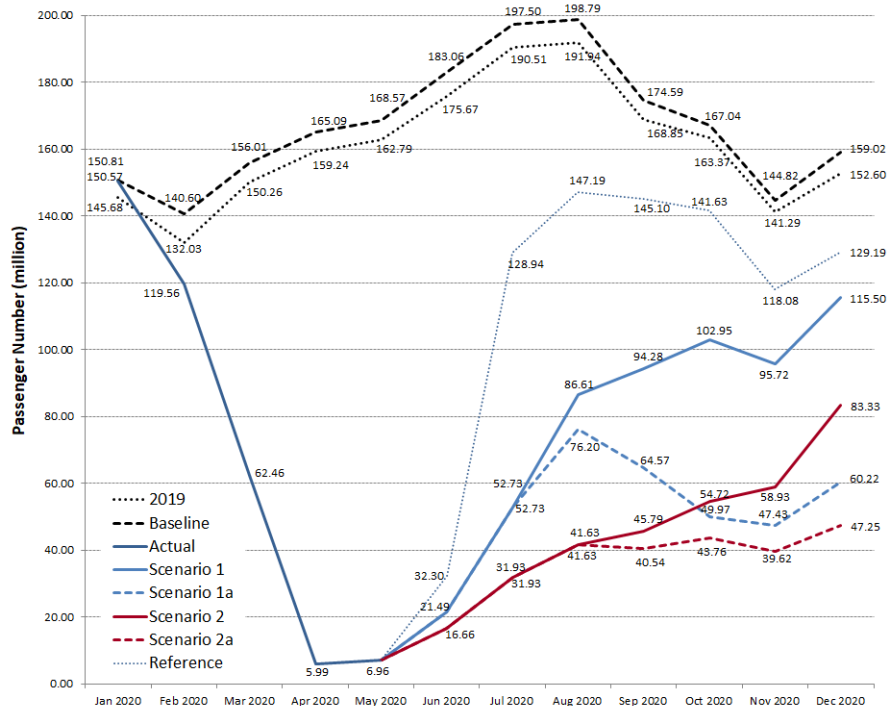
(-2,247 to -2,915 million from Baseline and -2,061 to -2,728 million from 2019)



Scenarios 1 & 2 (World total): Passenger numbers compared to Baseline & 2019

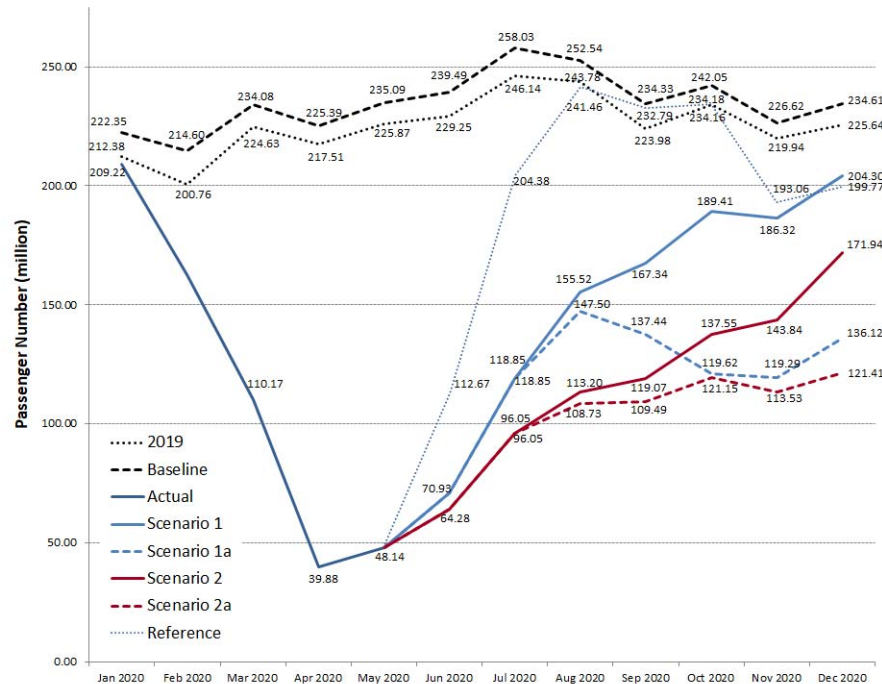
International

(-1,091 to -1,399 million from Baseline and -1,019 to -1,327 million from 2019)



Domestic

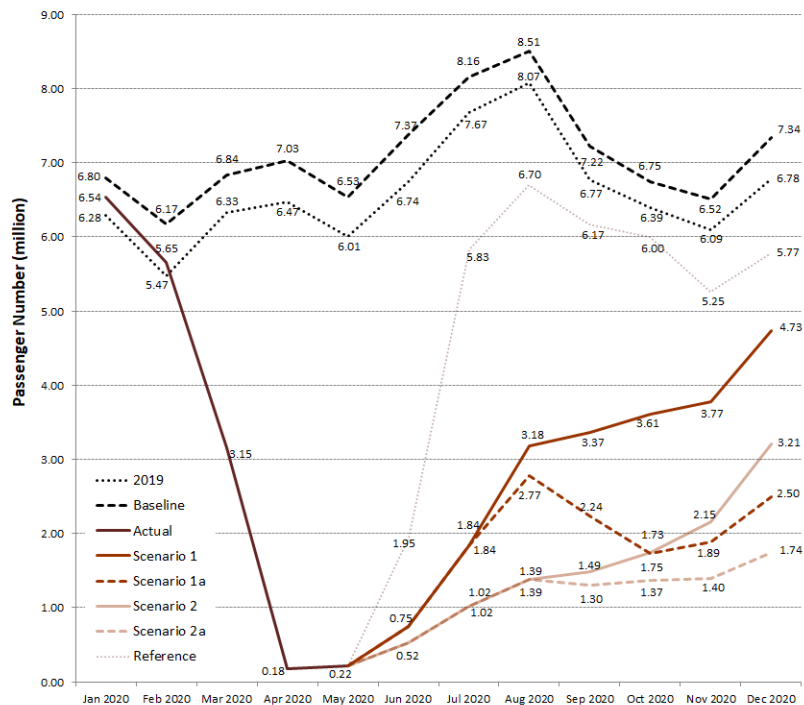
(-1,156 to -1,516 million from Baseline and -1,041 to -1,401 million from 2019)



Scenarios 1 & 2 (Africa): Passenger numbers compared to Baseline & 2019

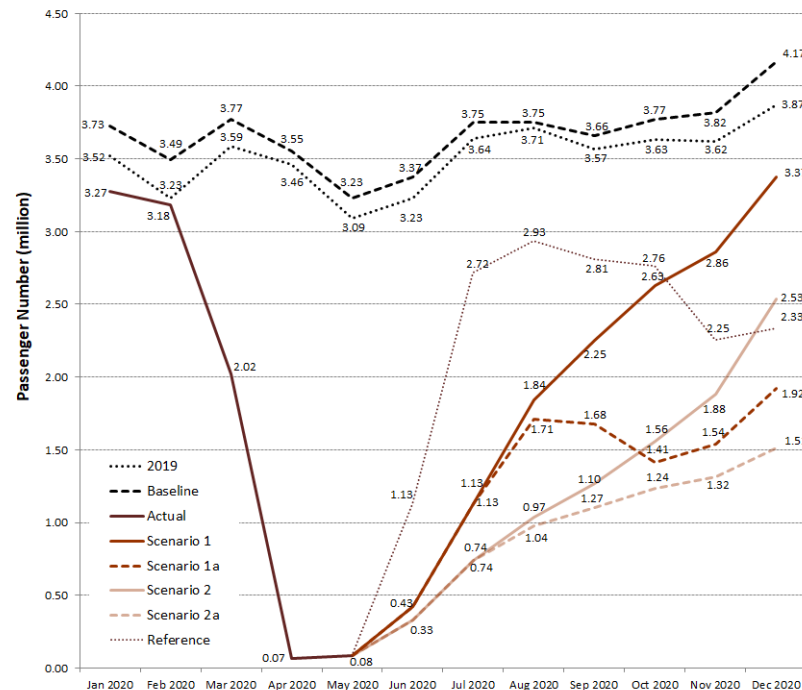
International

(-48 to -61 million from Baseline and -42 to -55 million from 2019)



Domestic

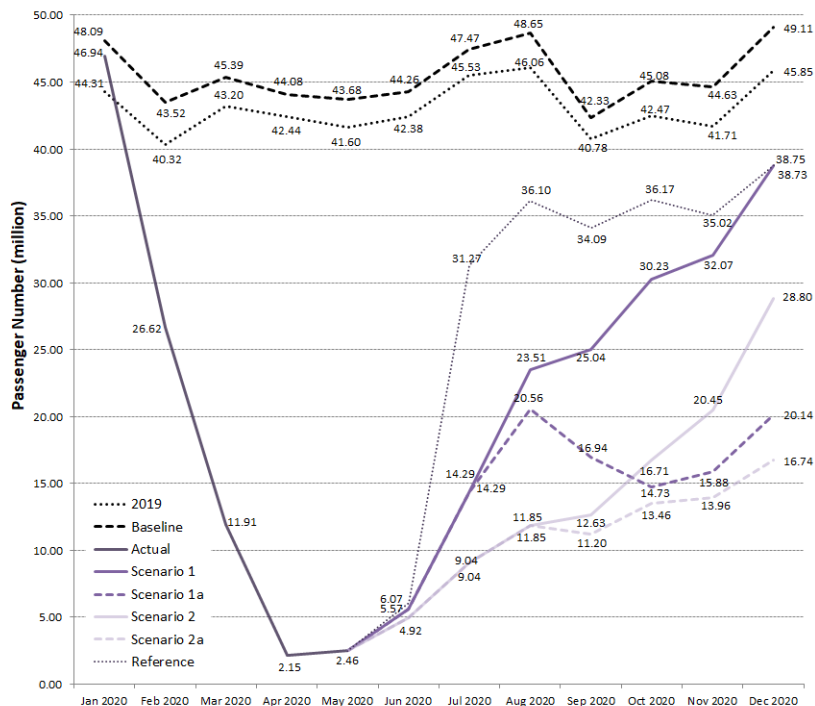
(-21 to -28 million from Baseline and -19 to -26 million from 2019)



Scenarios 1 & 2 (Asia/Pacific): Passenger numbers compared to Baseline & 2019

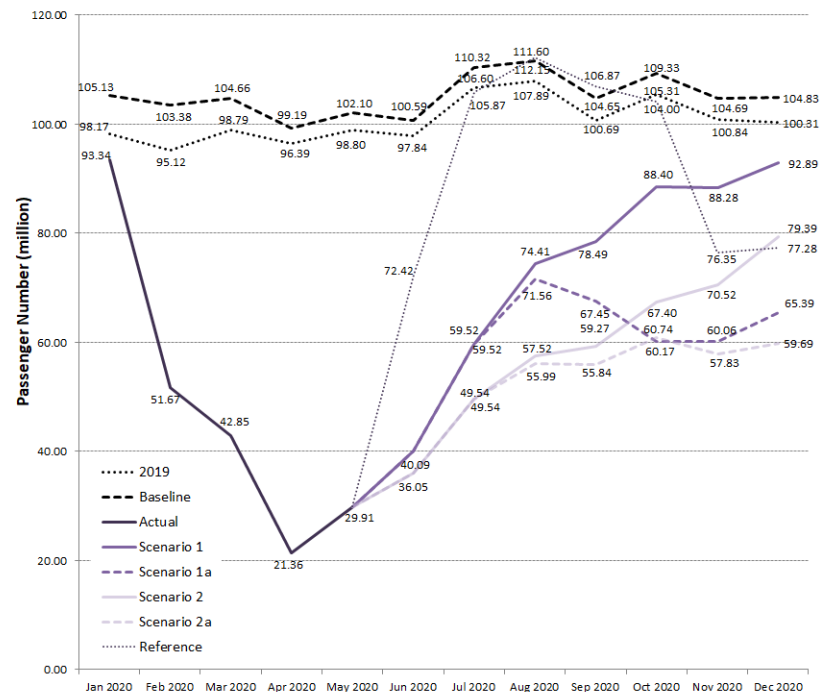
International

(-287 to -375 million from Baseline and -257 to -345 million from 2019)



Domestic

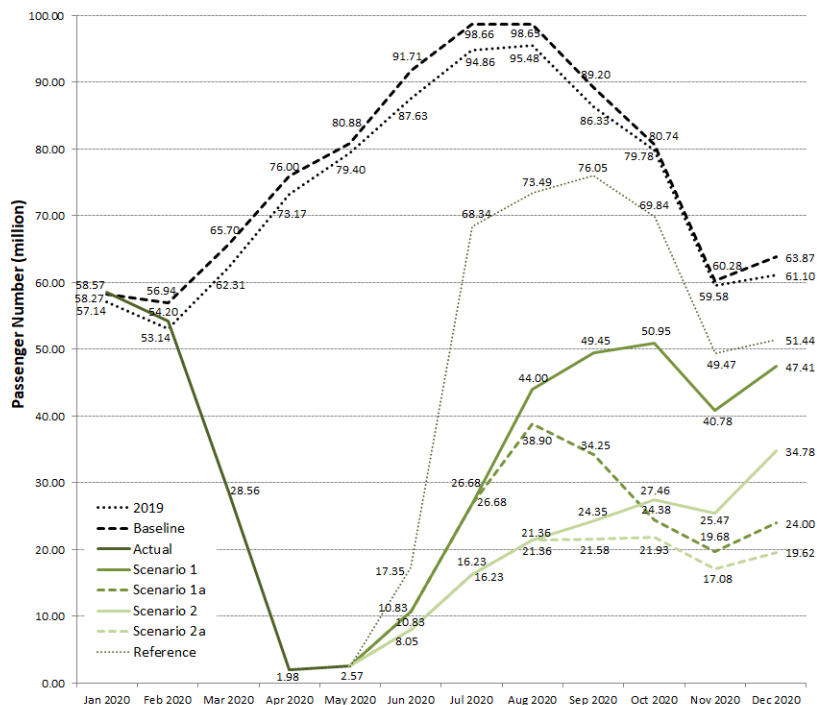
(-499 to -646 million from Baseline and -446 to -592 million from 2019)



Scenarios 1 & 2 (Europe): Passenger numbers compared to Baseline & 2019

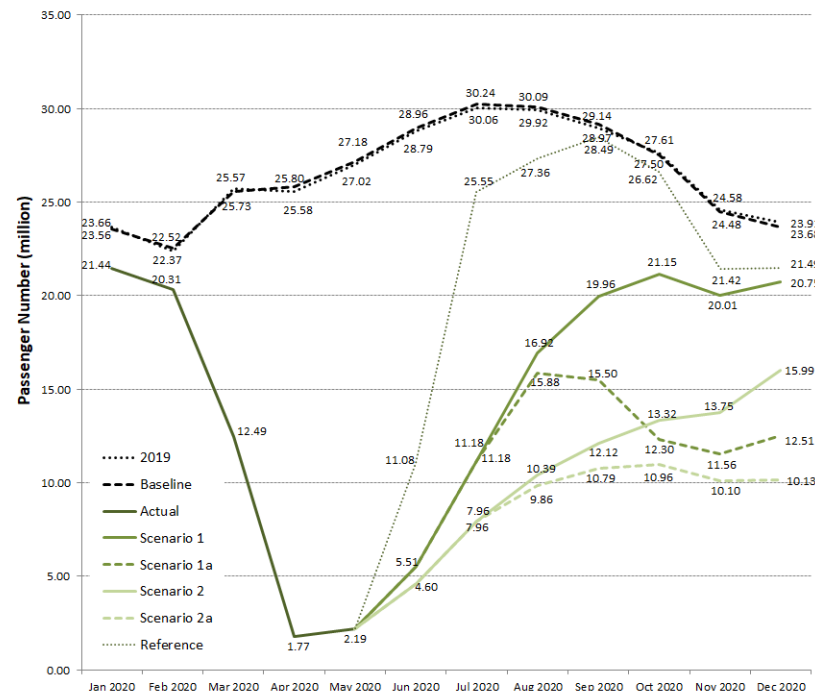
International

(-505 to -649 million from Baseline and -474 to -618 million from 2019)



Domestic

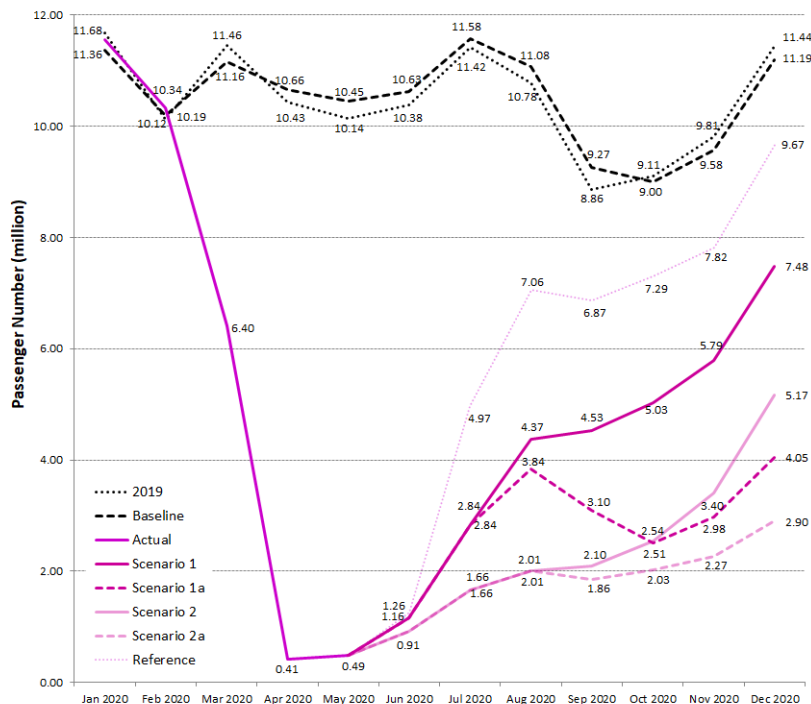
(-145 to -196 million from Baseline and -144 to -196 million from 2019)



Scenarios 1 & 2 (Latina America/Caribbean): Passenger numbers compared to Baseline & 2019

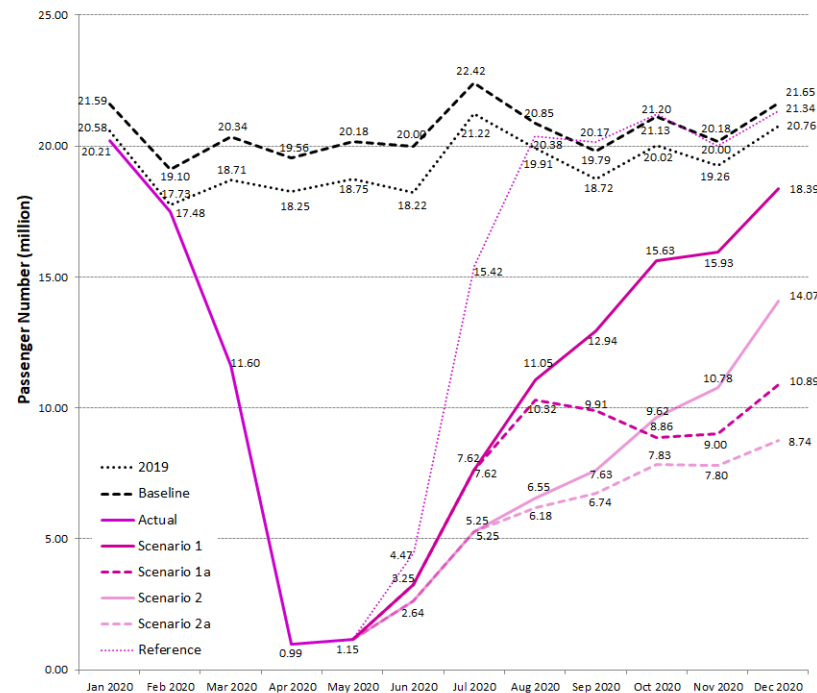
International

(-66 to -83 million from Baseline and -65 to -83 million from 2019)



Domestic

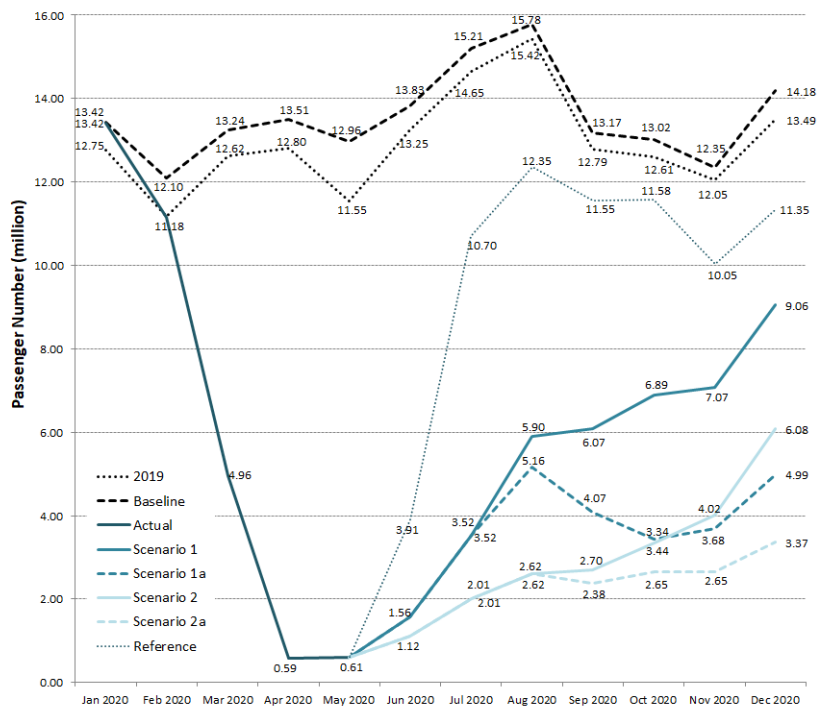
(-111 to -150 million from Baseline and -96 to -136 million from 2019)



Scenarios 1 & 2 (Middle East): Passenger numbers compared to Baseline & 2019

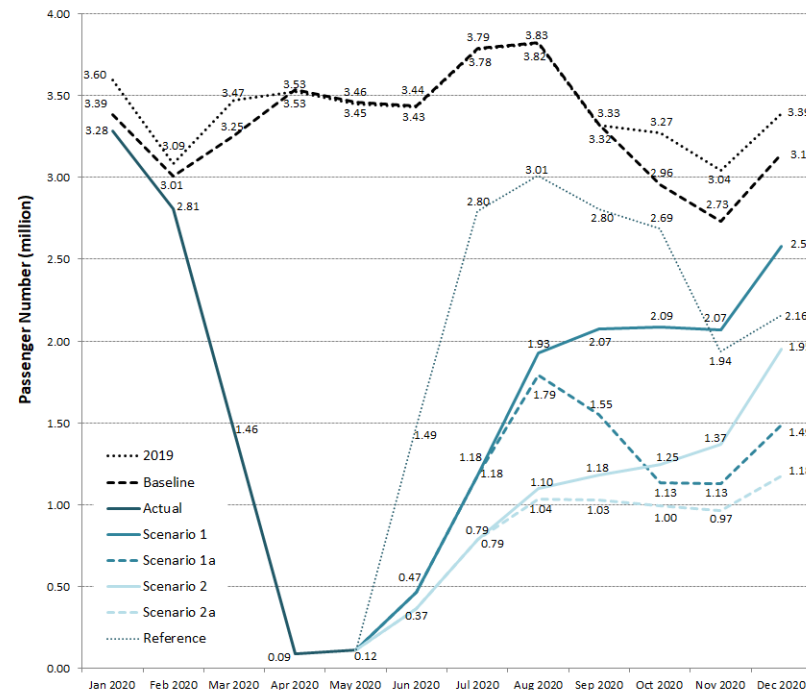
International

(-92 to -115 million from Baseline and -84 to -108 million from 2019)



Domestic

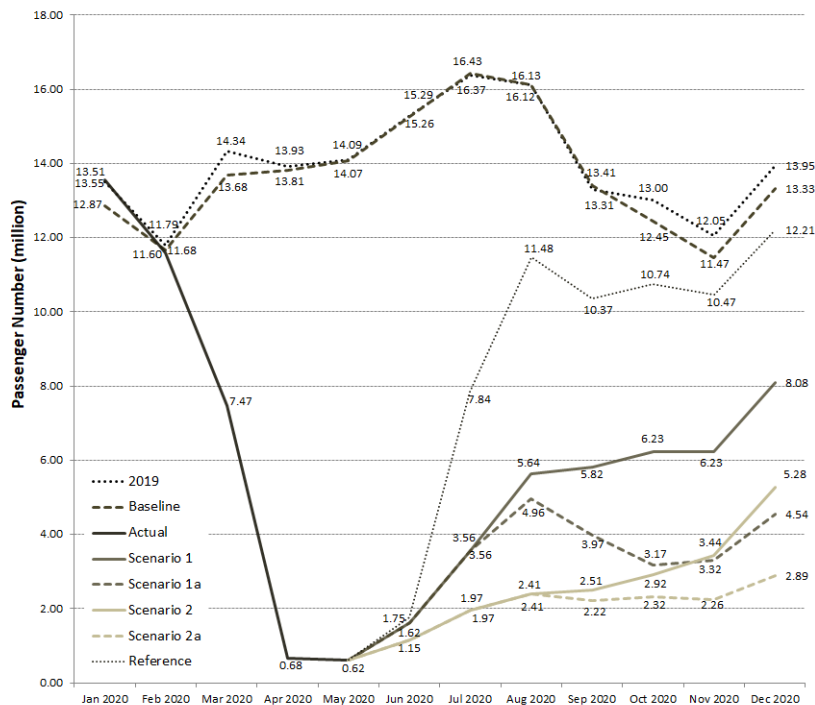
(-20 to -26 million from Baseline and -21 to -27 million from 2019)



Scenarios 1 & 2 (North America): Passenger numbers compared to Baseline & 2019

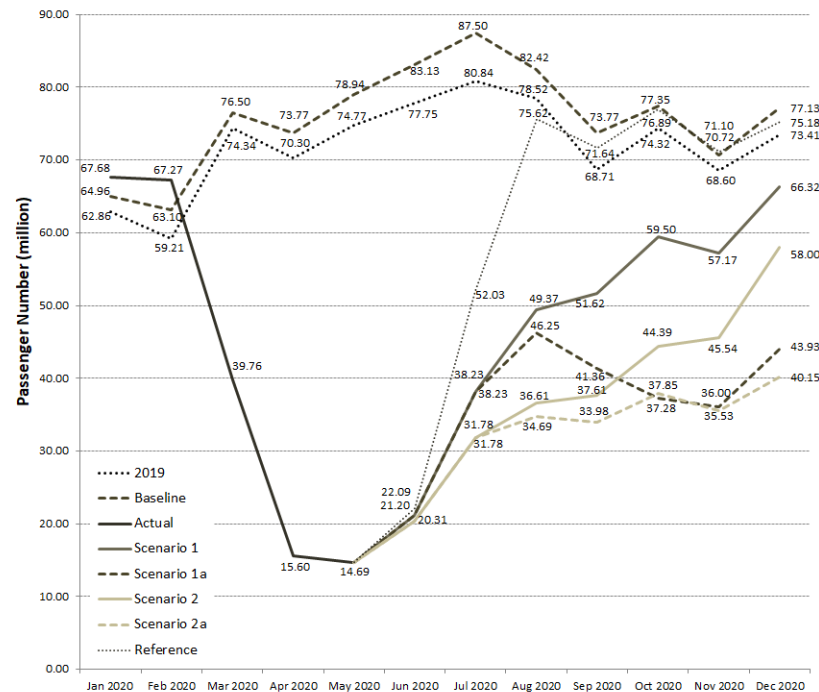
International

(-93 to -115 million from Baseline and -97 to -119 million from 2019)



Domestic

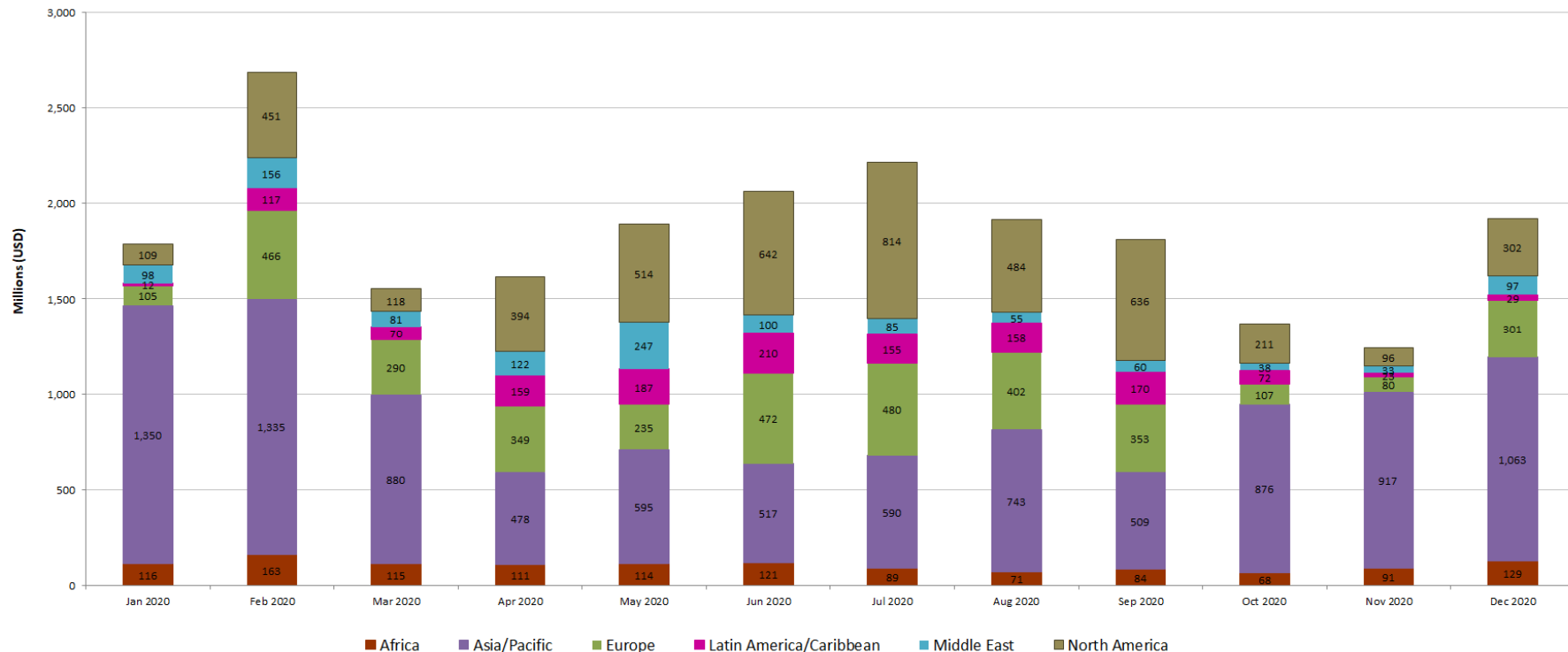
(-361 to -470 million from Baseline and -315 to -424 million from 2019)



Impact on Gross Passenger Operating Revenues of Airlines

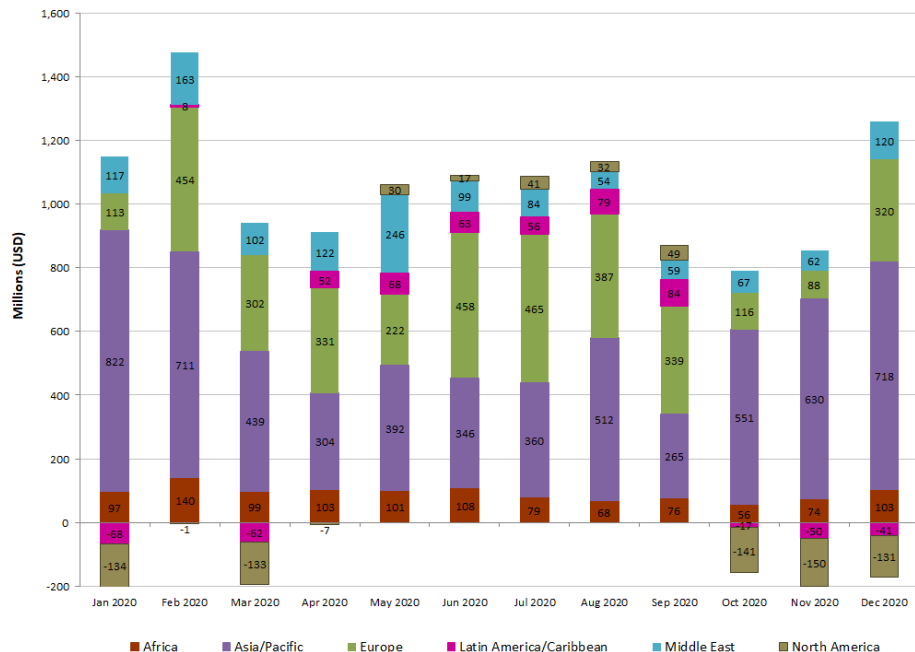
- With the originally-planned seat capacity and trend line growth of demand, airlines' gross passenger operating revenues could have increased **USD 22 billion** for 2020 (**USD 12 billion** from international and **USD 10 billion** from domestic), compared to 2019.
- According to the latest estimates, airlines' revenues could instead plummet **USD 297 to 384 billion** (international **USD 193 to 248 billion** and domestic **USD 104 to 136 billion**) below the Baseline, or **USD 275 to 362 billion** (international **USD 181 to 236 billion** and domestic **USD 93 to 125 billion**) below the 2019 level.
- Approximately 60% of revenue loss would be recorded by Asia/Pacific and Europe.

International + Domestic (+22 billion USD)

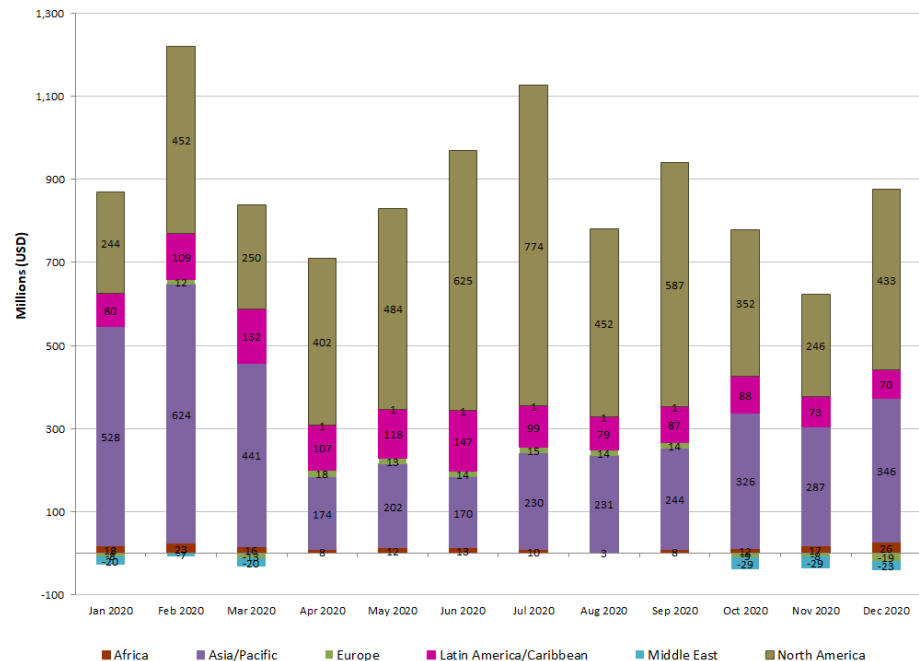


Baseline passenger revenues compared to 2019

International (+12 billion USD)



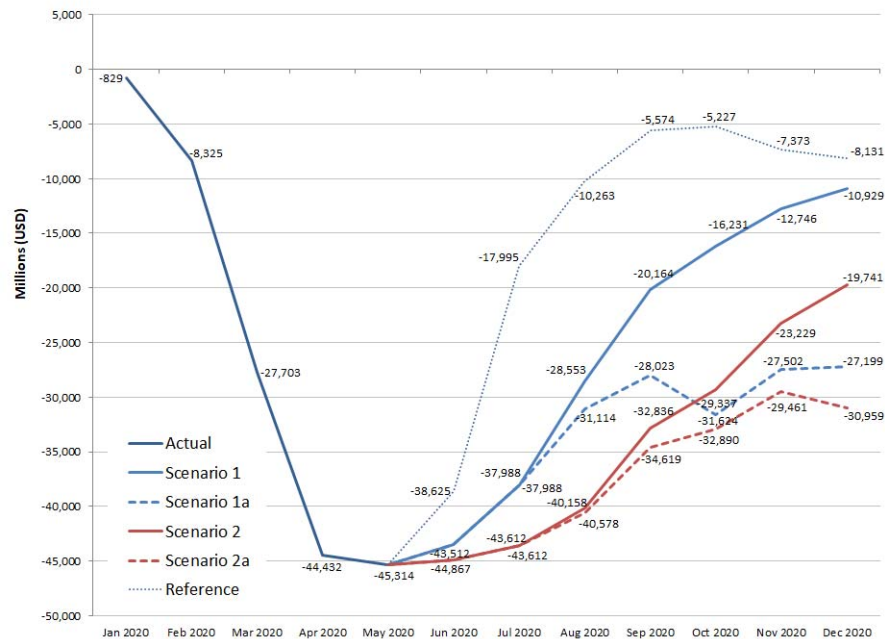
Domestic (+10 billion USD)



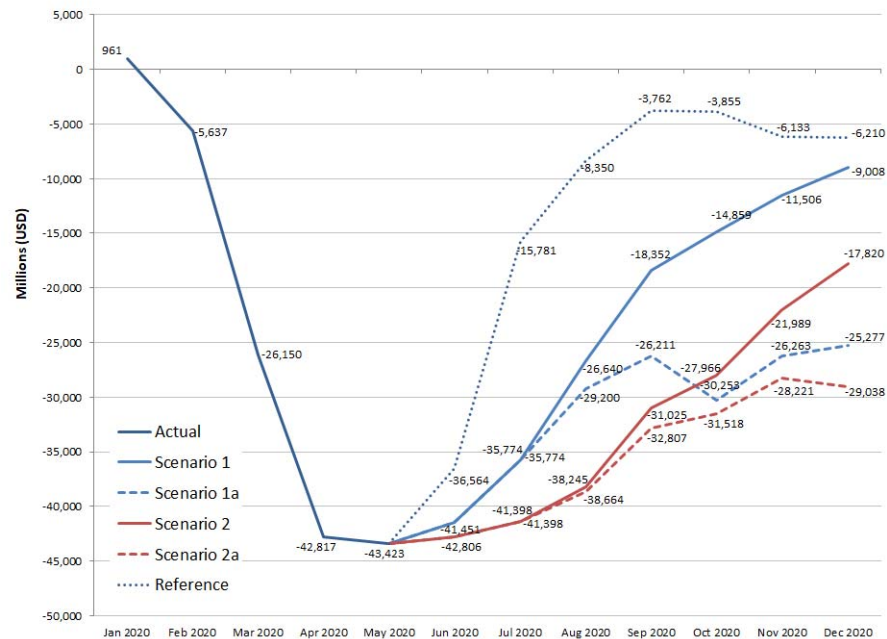
Note: The international revenues are gross passenger operating revenues of all airlines serving international routes from each country and territory, which are aggregated at the regional level (revenues of international routes to each country and territory were removed to avoid double counting).

Scenarios 1 & 2 (World total): Passenger revenues compared to Baseline & 2019

International + Domestic (-297 to -384 billion USD from Baseline)

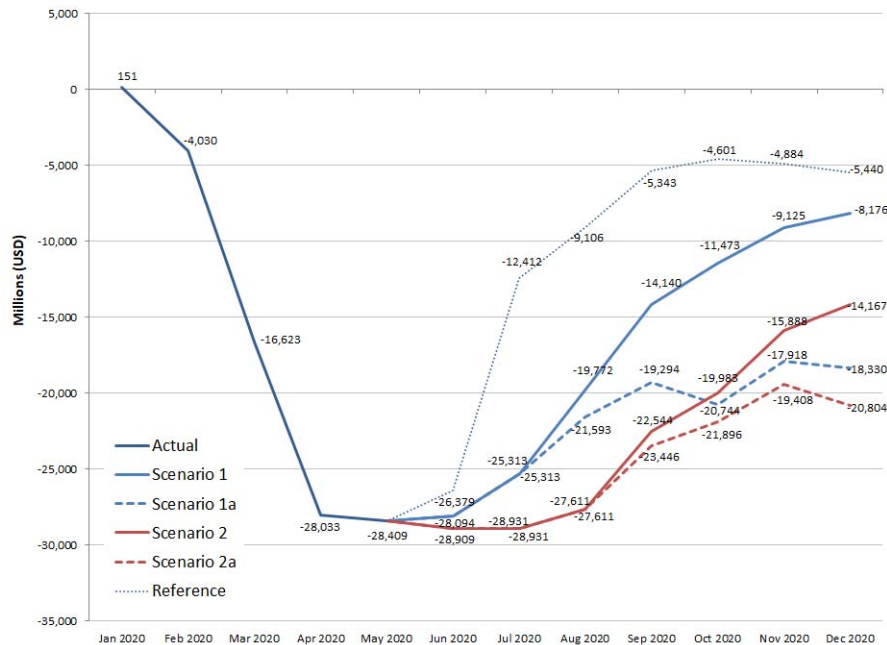


International + Domestic (-275 to -362 billion USD from 2019)

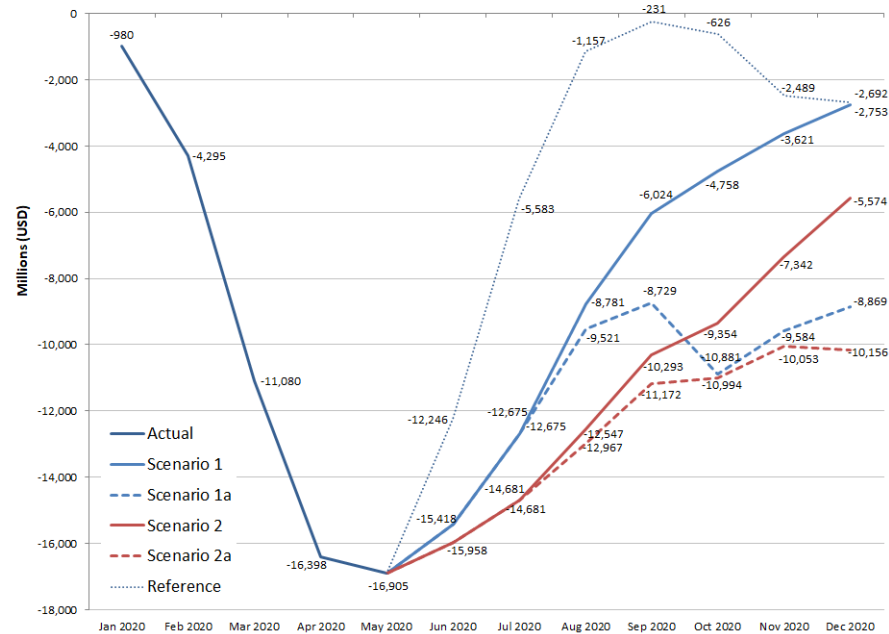


Scenarios 1 & 2 (World total): Passenger revenues compared to Baseline

International (-193 to -248 billion USD)

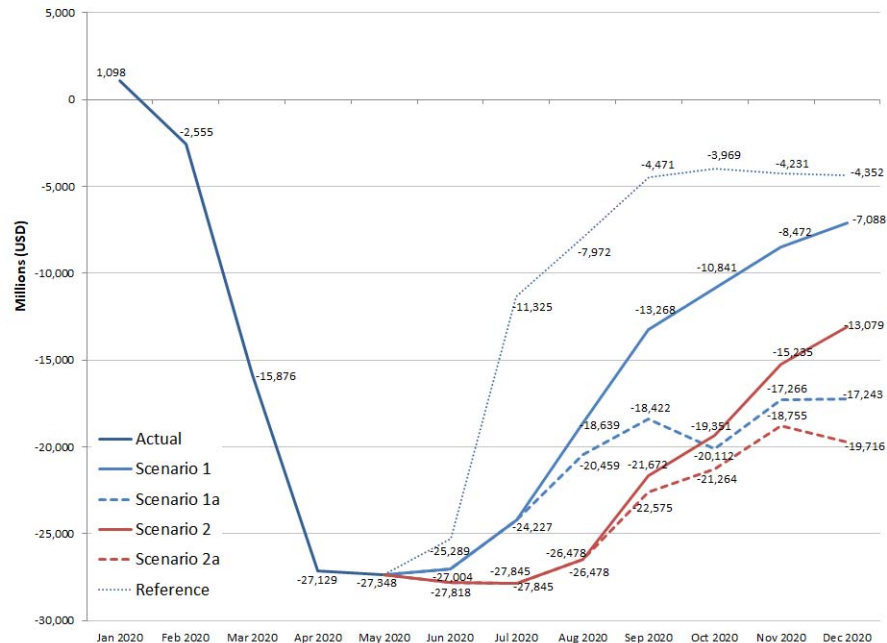


Domestic (-104 to -136 billion USD)

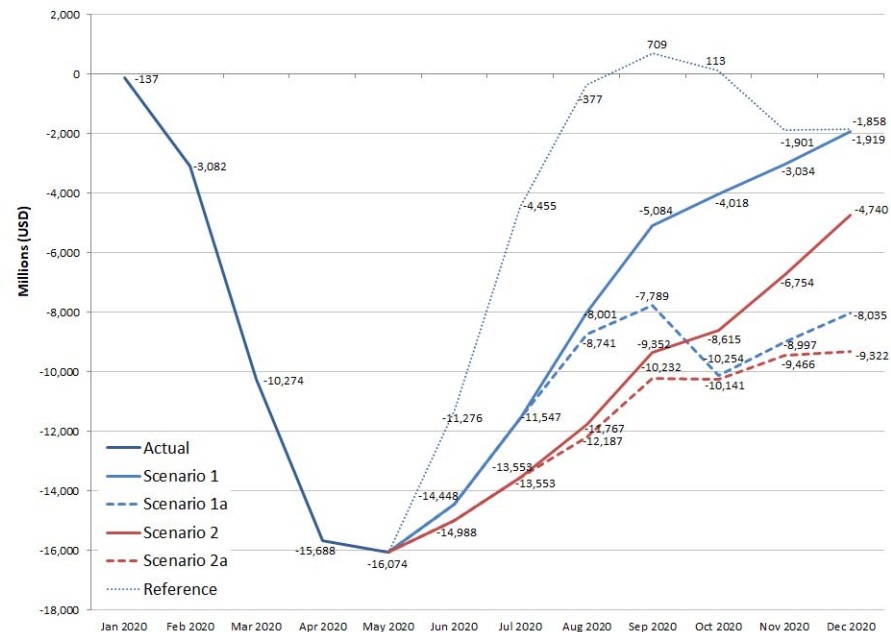


Scenarios 1 & 2 (World total): Passenger revenues compared to 2019

International (-181 to -236 billion USD)

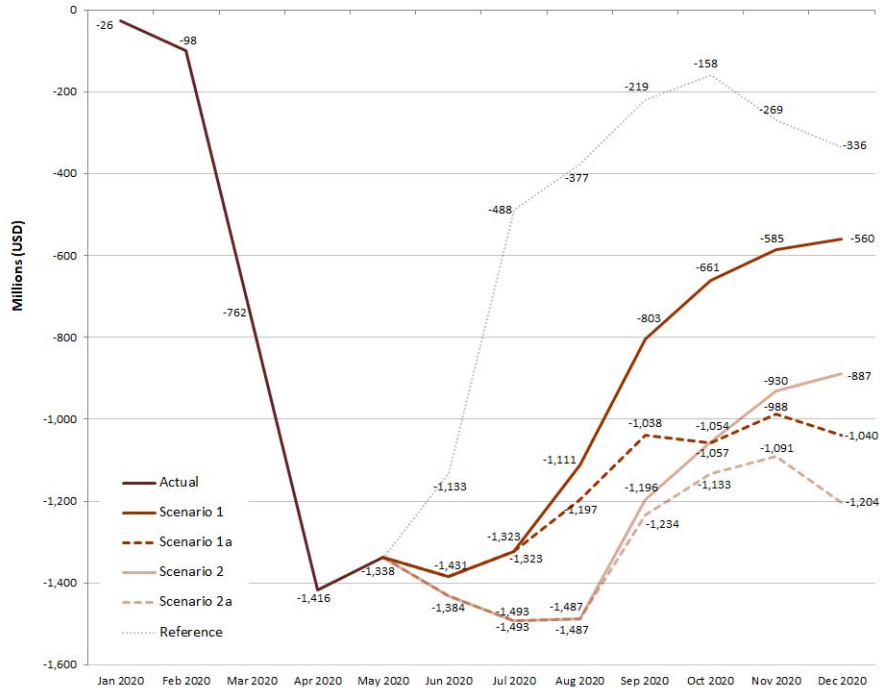


Domestic (-93 to -125 billion USD)

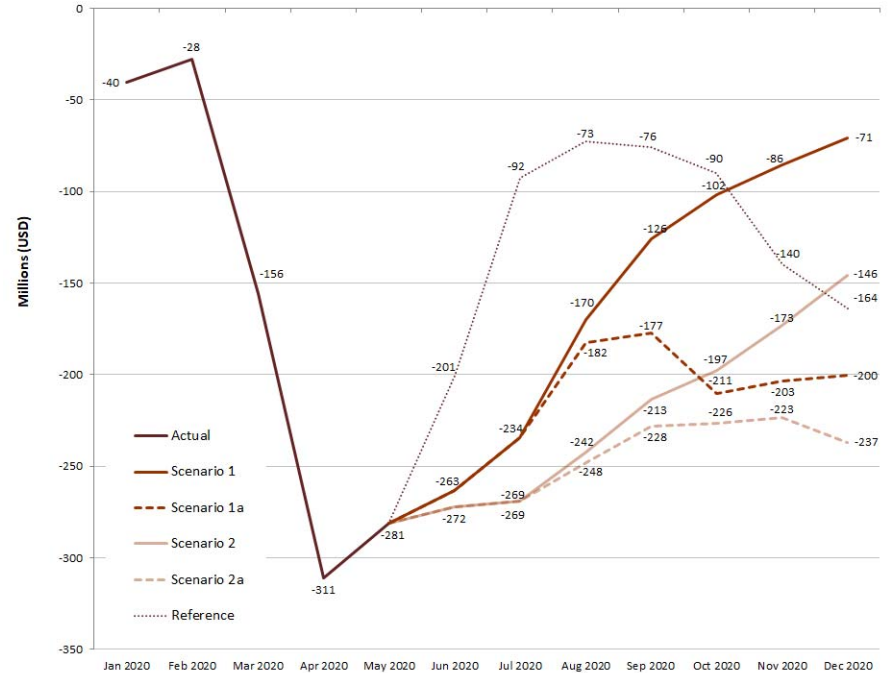


Scenarios 1 & 2 (Africa): Passenger revenues compared to Baseline

International (-10 to -13 billion USD)

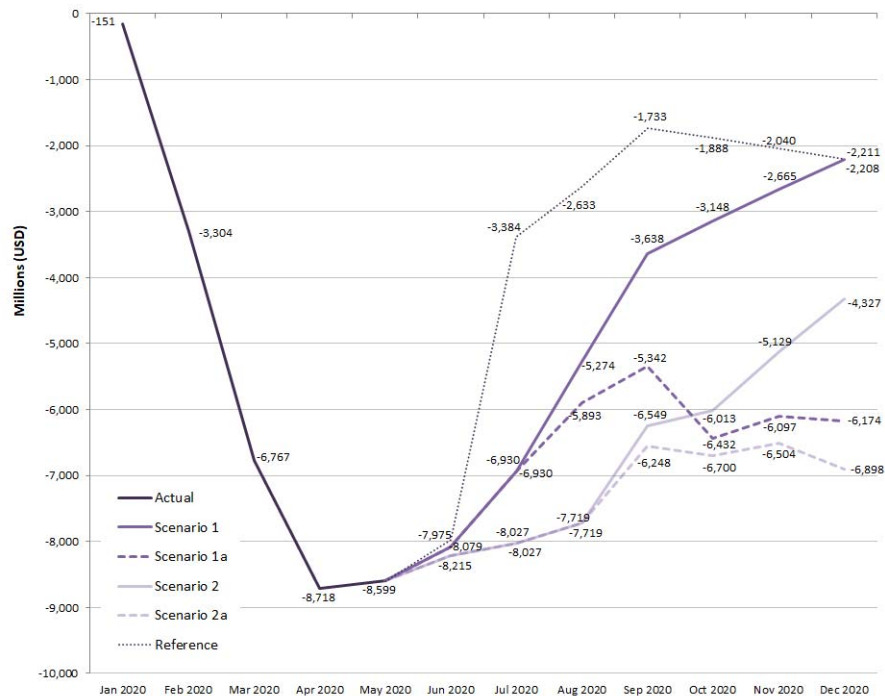


Domestic (-2 to -3 billion USD)

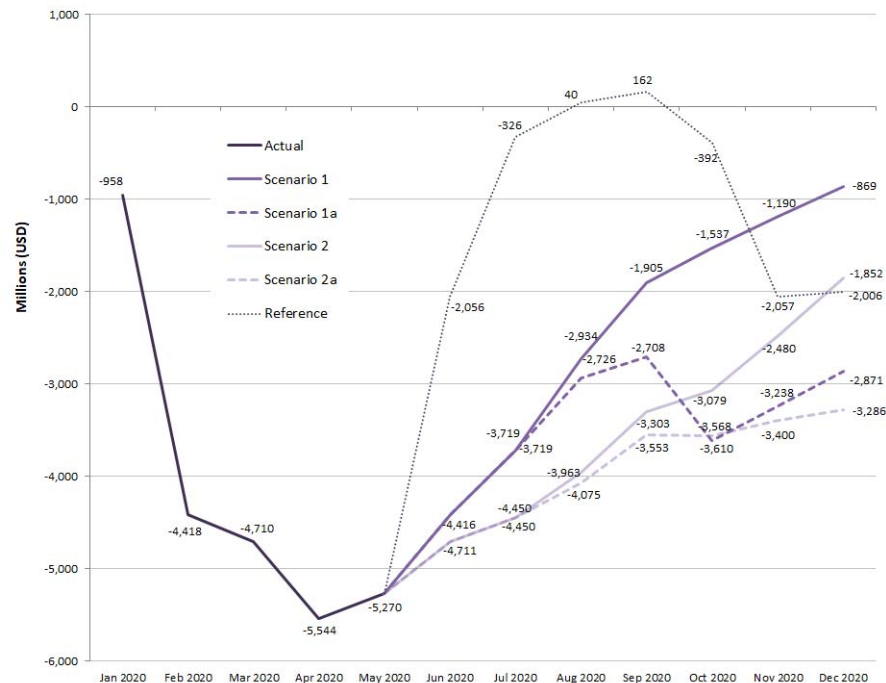


Scenarios 1 & 2 (Asia/Pacific): Passenger revenues compared to Baseline

International (-59 to -78 billion USD)

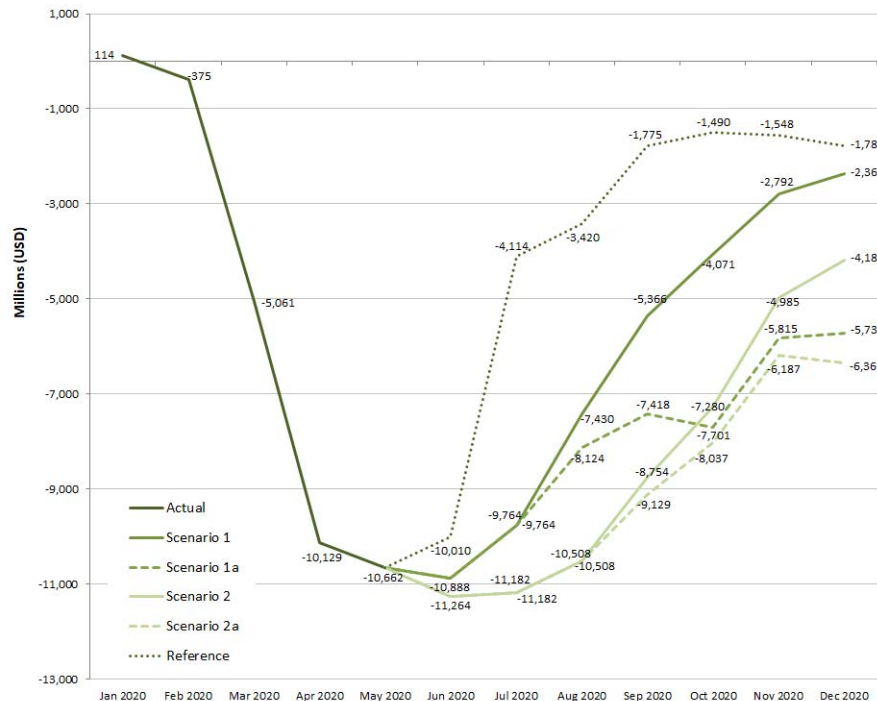


Domestic (-37 to -48 billion USD)

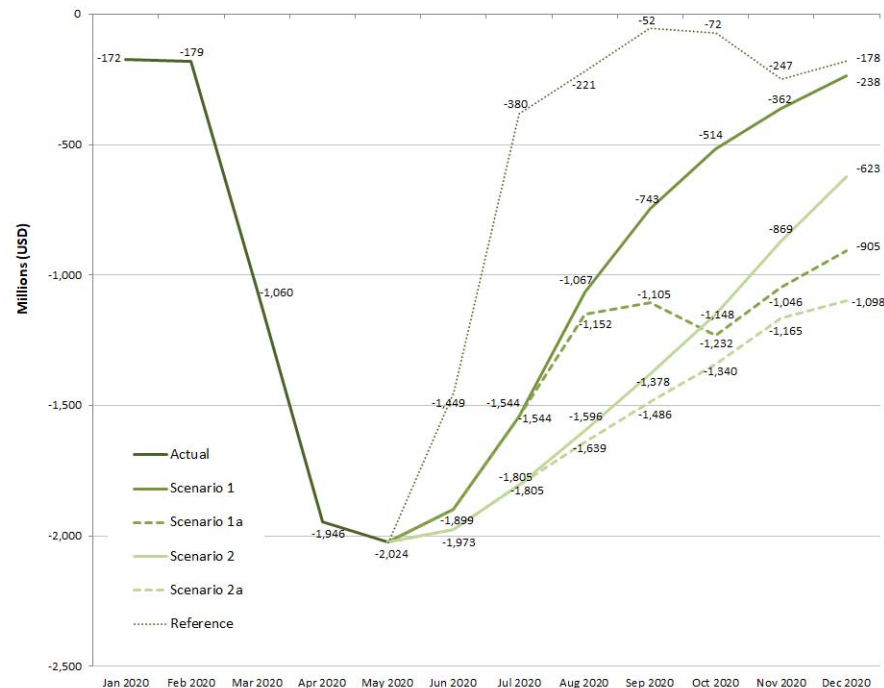


Scenarios 1 & 2 (Europe): Passenger revenues compared to Baseline

International (-69 to -89 billion USD)

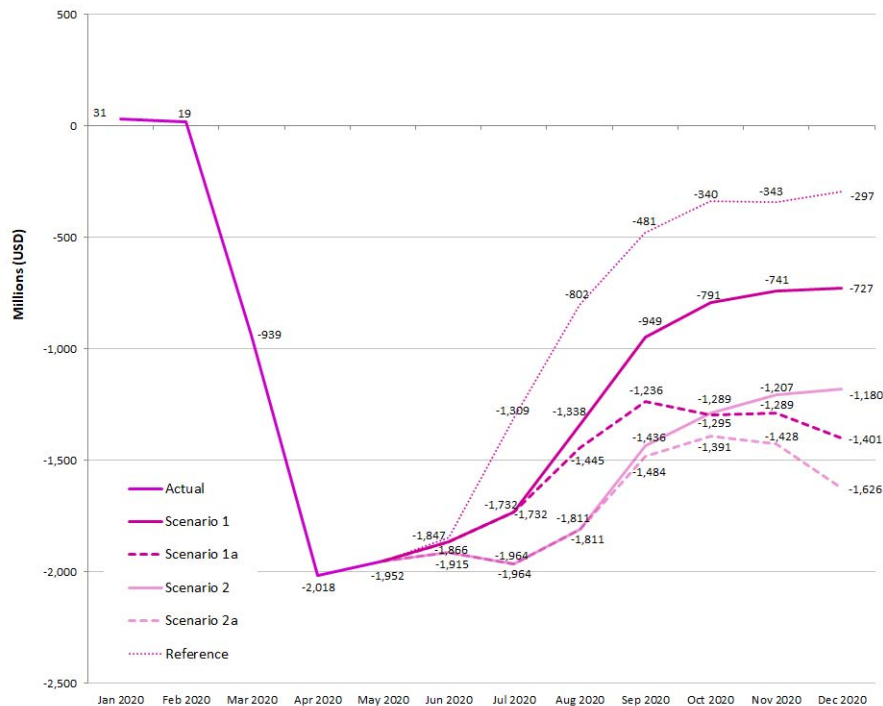


Domestic (-12 to -16 billion USD)

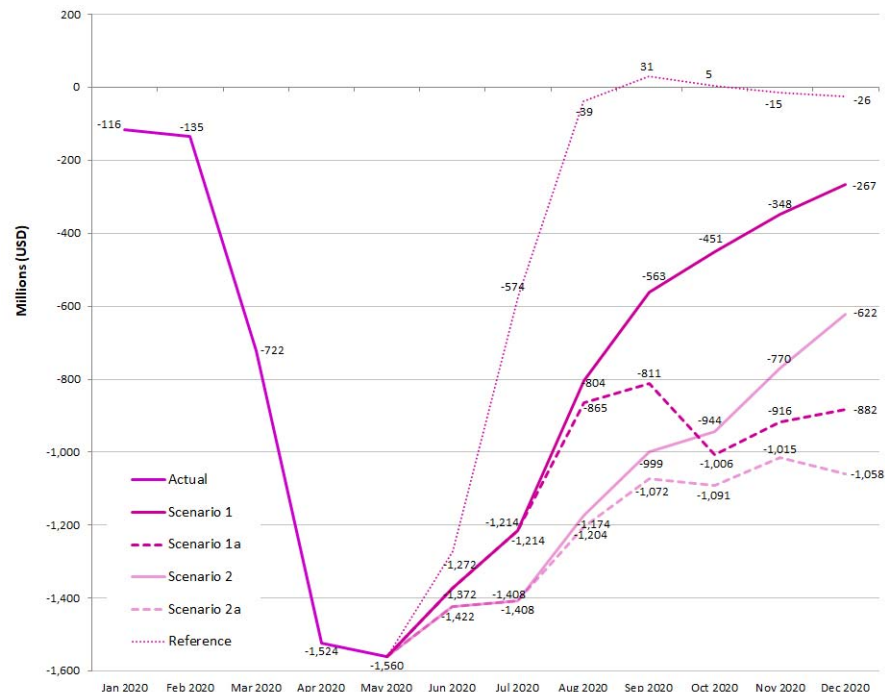


Scenarios 1 & 2 (Latin America/Caribbean): Passenger revenues compared to Baseline

International (-13 to -16 billion USD)

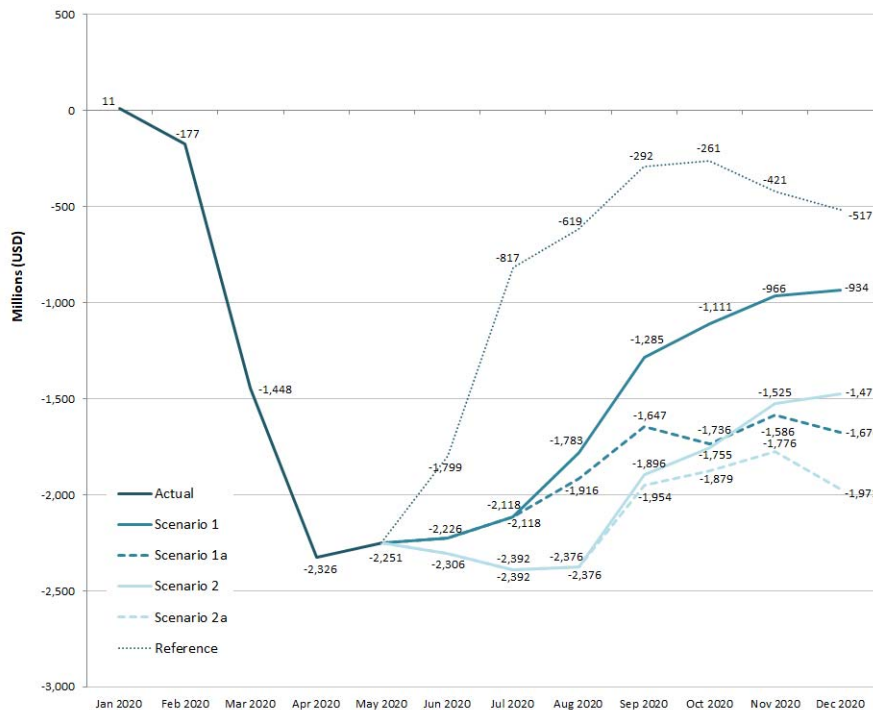


Domestic (-9 to -12 billion USD)

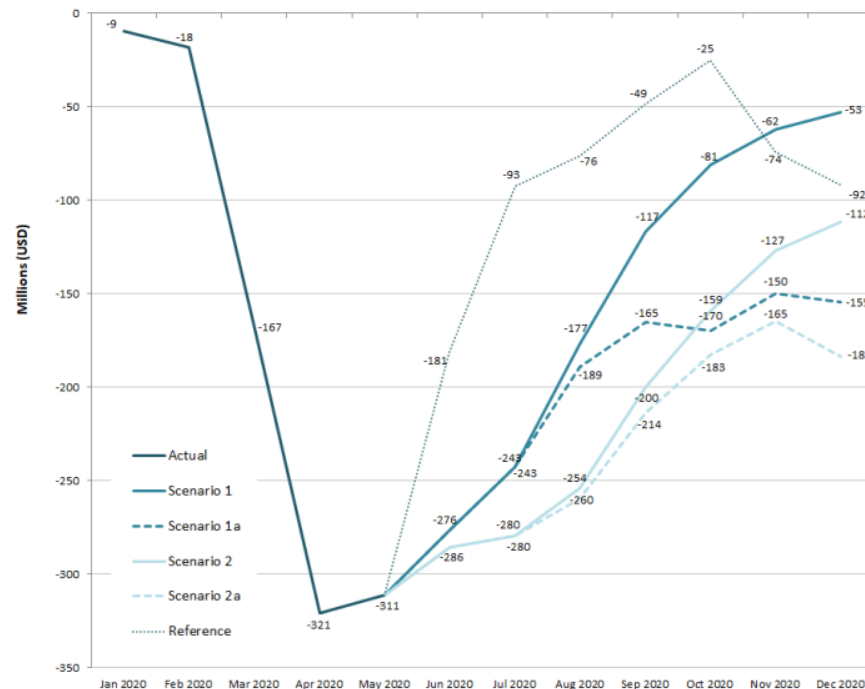


Scenarios 1 & 2 (Middle East): Passenger revenues compared to Baseline

International (-17 to -21 billion USD)

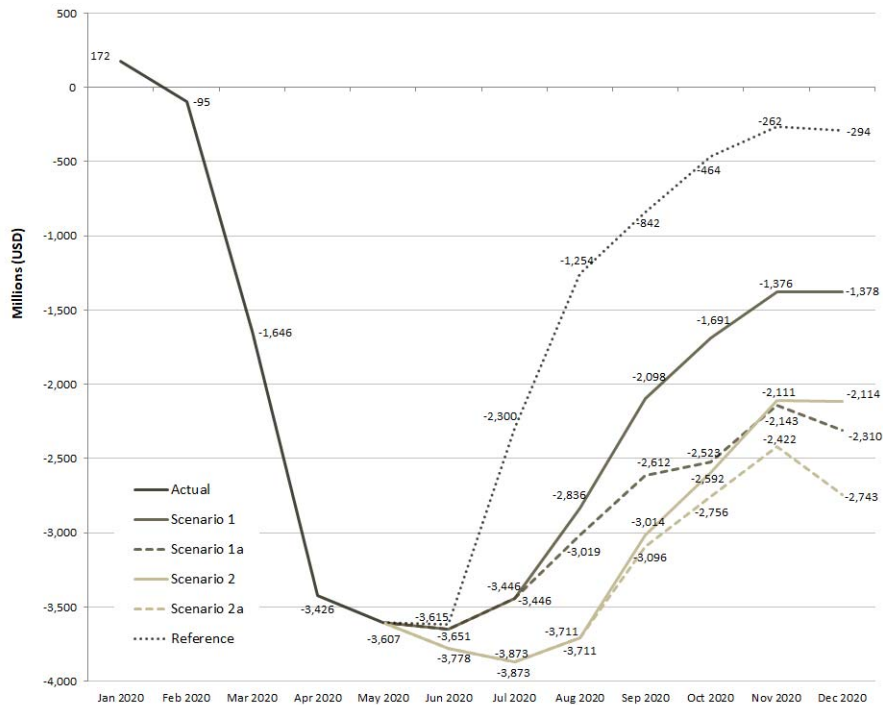


Domestic (-2 to -2 billion USD)

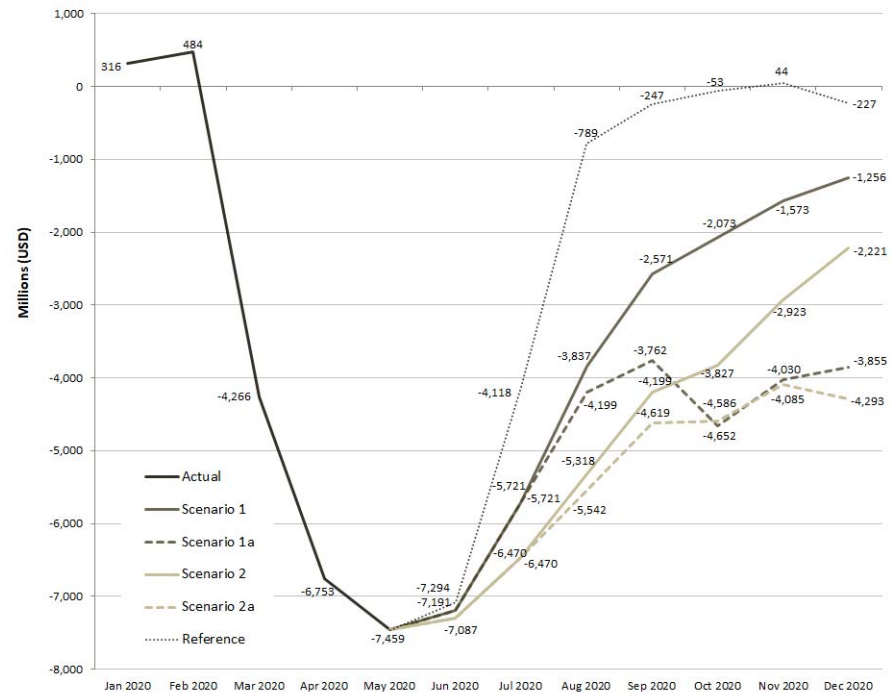


Scenarios 1 & 2 (North America): Passenger revenues compared to Baseline

International (-25 to -31 billion USD)



Domestic (-42 to -55 billion USD)





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Appendix A: Situation Overview



COVID-19 outbreak has impacted air traffic of China starting from late January 2020



Note: The above includes a) international from mainland China, Hong Kong SAR of China, Macao SAR of China, Taiwan, Province of China; b) domestic within mainland China, and c) regional between mainland China and Hong Kong SAR, Macao SAR and Taiwan Province

A surge of COVID-19 confirmed cases occurred in several States by late February 2020

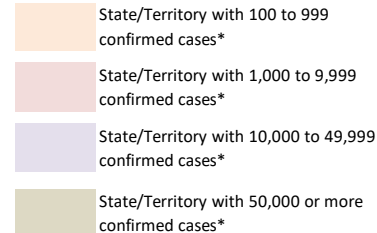
January 2020 International passenger seat capacity

Country/Territory	Capacity change from originally-planned	
Russian Federation	-89,778	-1%
Italy	-65,971	-1%
Turkey	-53,262	-1%
China	-45,484	0%
Morocco	-42,684	-2%
United Arab Emirates	-31,464	0%
Iraq	-29,326	-3%
Albania	-22,080	-7%
United Kingdom	-21,888	0%
South Africa	-21,476	-1%
Iran Islamic Republic of	-20,891	-2%
France	-19,537	0%
Poland	-18,154	0%
Romania	-17,493	-1%
Japan	-16,449	0%
United States	-13,067	0%
Indonesia	-12,114	0%
Bulgaria	-10,540	-1%
India	-10,342	0%
Cambodia	-10,158	-1%
Bahamas	-9,588	-2%
Denmark	-8,942	0%
Viet Nam	-8,489	0%
Malta	-7,372	-1%
Lebanon	-7,182	-1%
Bahrain	-7,123	-1%
Uzbekistan	-6,539	-1%
Tunisia	-6,362	-1%
Switzerland	-6,235	0%
Czechia	-5,642	0%

February 2020 International passenger seat capacity

Country/Territory	Capacity change from originally-planned	
China	-10,532,219	-61%
Hong Kong SAR of China (CN)	-2,363,320	-36%
Republic of Korea	-1,717,147	-19%
Japan	-1,592,429	-15%
Thailand	-1,452,478	-15%
Taiwan, Province of China (CN)	-1,446,686	-23%
Singapore	-807,608	-12%
Viet Nam	-731,936	-16%
Macao SAR of China (CN)	-721,489	-64%
Philippines	-646,104	-18%
United States	-620,296	-3%
Malaysia	-448,172	-8%
Indonesia	-426,102	-10%
Russian Federation	-317,890	-5%
Cambodia	-307,968	-4%
Turkey	-277,868	-21%
Italy	-268,846	-3%
United Arab Emirates	-253,548	-2%
Australia	-241,284	-5%
United Kingdom	-188,864	-1%
Iran Islamic Republic of	-169,782	-18%
France	-157,998	-1%
Myanmar	-147,487	-21%
Germany	-145,561	-1%
India	-116,823	-2%
Morocco	-108,186	-5%
Qatar	-99,338	-2%
Canada	-96,231	-1%
Lao People's Democratic Republic	-71,910	-21%
Finland	-71,413	-4%

In February 2020, international passenger capacity **reduced by 10%**, mainly related to traffic from/to States experiencing an early outbreak and States deeply interconnected to China.



*: Coronavirus Disease 2019 (COVID-19) Situation Report by WHO (29 February 2020)

COVID-19 Pandemic was declared and accelerating in March 2020

March 2020 International Passenger Capacity

Country/Territory	Capacity change from originally-planned	
China	-14,841,792	-82%
Italy	-6,860,837	-60%
Republic of Korea	-6,536,917	-70%
Japan	-5,837,894	-51%
Germany	-5,771,162	-31%
Hong Kong SAR of China (CN)	-5,352,855	-77%
United Kingdom	-4,965,296	-22%
United States	-4,950,969	-19%
Thailand	-4,587,421	-46%
Taiwan, Province of China (CN)	-4,074,431	-62%
Spain	-3,792,140	-26%
United Arab Emirates	-3,400,833	-26%
Singapore	-3,297,434	-45%
France	-3,216,482	-25%
Turkey	-2,879,271	-35%
Viet Nam	-2,599,336	-55%
Malaysia	-2,500,355	-42%
India	-2,077,578	-29%
Saudi Arabia	-1,747,385	-31%
Switzerland	-1,691,017	-28%

Country/Territory	Capacity change from originally-planned	
Philippines	-1,669,456	-45%
Indonesia	-1,466,518	-34%
Netherlands	-1,292,472	-17%
Canada	-1,218,383	-16%
Austria	-1,200,864	-30%
Russian Federation	-1,177,704	-19%
Australia	-1,119,345	-25%
Portugal	-1,118,941	-26%
Belgium	-1,060,572	-31%
Qatar	-1,041,439	-21%
Denmark	-980,211	-28%
Israel	-972,061	-44%
Poland	-967,520	-24%
Macao SAR of China (CN)	-954,453	-80%
Egypt	-818,043	-28%
Morocco	-762,145	-31%
Sweden	-761,425	-24%
Ireland	-733,678	-21%
Greece	-635,039	-34%
Czechia	-610,048	-37%

In March 2020, global international passenger capacity **reduced by 48%**, with significant reduction not only in States experiencing an early outbreak but also worldwide.

	State/Territory with 100 to 999 confirmed cases*
	State/Territory with 1,000 to 9,999 confirmed cases*
	State/Territory with 10,000 to 49,999 confirmed cases*
	State/Territory with 50,000 or more confirmed cases*

*: Coronavirus Disease 2019 (COVID-19) Situation Report by WHO (31 March 2020)

The world reached 3 million confirmed COVID-19 cases in April 2020

April 2020 International Passenger Capacity

Country/Territory	Capacity change from originally-planned	
United States	-22,976,621	-88%
United Kingdom	-22,345,210	-90%
Germany	-19,374,444	-92%
Spain	-18,041,897	-94%
China	-16,683,876	-95%
France	-13,480,021	-91%
Italy	-12,464,502	-94%
United Arab Emirates	-11,009,896	-89%
Japan	-9,501,833	-88%
Turkey	-8,798,224	-94%
Thailand	-8,441,105	-94%
Republic of Korea	-7,960,525	-86%
Hong Kong SAR of China (CN)	-7,122,206	-93%
Netherlands	-6,960,693	-89%
Singapore	-6,596,279	-93%
Canada	-6,288,656	-90%
India	-6,286,458	-89%
Switzerland	-5,990,424	-93%
Russian Federation	-5,747,918	-87%
Taiwan, Province of China (CN)	-5,400,277	-85%

Country/Territory	Capacity change from originally-planned	
Malaysia	-4,959,606	-85%
Portugal	-4,913,803	-95%
Saudi Arabia	-4,193,572	-77%
Australia	-4,115,805	-92%
Mexico	-4,104,882	-78%
Austria	-3,812,866	-91%
Qatar	-3,760,492	-80%
Indonesia	-3,723,583	-87%
Viet Nam	-3,681,731	-89%
Ireland	-3,595,318	-92%
Poland	-3,449,632	-79%
Denmark	-3,417,729	-93%
Belgium	-3,323,135	-87%
Greece	-3,078,774	-94%
Philippines	-2,993,741	-86%
Sweden	-2,941,579	-89%
Norway	-2,476,519	-90%
Egypt	-2,248,437	-78%
Brazil	-2,214,850	-92%
Israel	-2,196,238	-91%

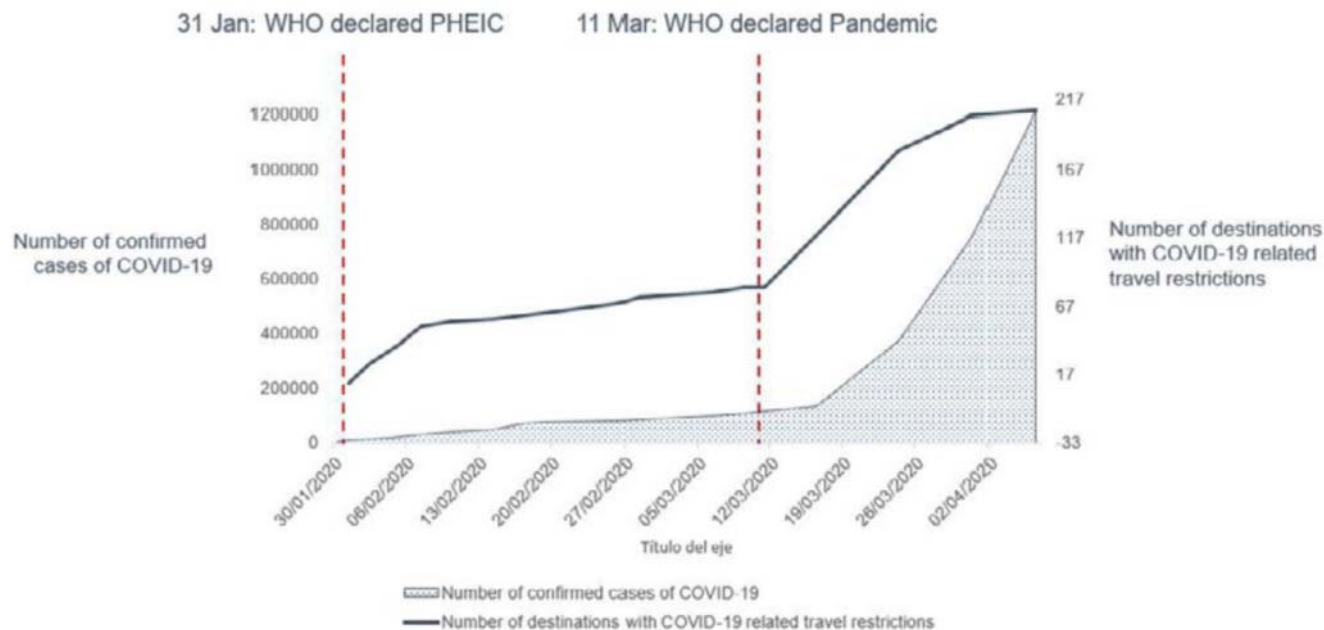
In April 2020, global international passenger capacity so far experienced by **unprecedented 94% reduction** (estimated)

	State/Territory with 100 to 999 confirmed cases*
	State/Territory with 1,000 to 9,999 confirmed cases*
	State/Territory with 10,000 to 49,999 confirmed cases*
	State/Territory with 50,000 or more confirmed cases*

*: Coronavirus Disease 2019 (COVID-19) Situation Report by WHO (30 April 2020)

Drastic reduction in passenger traffic amplified by travel restrictions

Number of confirmed cases and destinations with COVID-19-related travel restrictions



As of 6 April 2020, 96% of all world destinations have travel restrictions. About 90 destinations have completely or partially closed their borders for tourists, while another 44 destinations are closing their borders for specific countries of origin.

<https://www.unwto.org/news/covid-19-response-travel-restrictions>

In contrast to the fall in passenger traffic, cargo flights surged with the increased cargo-only operations using passenger aircraft





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Appendix B: Scenario Assumptions in Detail

(International and domestic)	Baseline (Originally-planned, business as usual)	
	Seat capacity	Passenger load factor
January 2020	Airlines' winter schedules filed with OAG as of 6 January 2020	Forecasted 2020 load factor by region/route group, based on ICAO long-term traffic forecasts (LTF), which was adjusted monthly by difference between 2019 actual monthly results (ICAO, IATA) and 2019 LTF forecasted load factor
February 2020		
March 2020		
April 2020	Maximum number of seats taken from airlines' summer schedules filed with OAG during the period from 6 January 2020 to 20 April 2020	
May 2020		
June 2020		
July 2020		
August 2020		
September 2020	Using 2019 winter schedule as the base, and applying the growth rate of 2019/2018	
October 2020		
November 2020		
December 2020		

(International and domestic)	Scenarios 1/1a, 2/2a and Reference	
	Seat capacity	Passenger load factor
January 2020	Actual capacity based on ICAO ADS-B data	Actual estimated results by region/route group
February 2020		
March 2020		
April 2020		
May 2020	Most recent airlines' schedules filed with OAG or world average of -93% (using regional average for each region monthly) from Baseline whichever is smaller	30 percentage points lower than Baseline with adjustment of GDP impact by region/route group
June 2020	Scenarios 1/1a & 2/2a: Application of monthly "base percentage" which incorporates impacts of intra-/inter-regional share difference (2019), or most recent airlines' schedules filed with OAG, whichever is smaller Reference: Most recent airlines' schedules filed with OAG	Application of "base percentage", which are subsequently adjusted by GDP impact by region/route group
July 2020		
August 2020		
September 2020		
October 2020		
November 2020		
December 2020		

International (world average)

Seat capacity	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Reference	-77%	-22%	-18%	-10%	-8%	-11%	-14%
Scenario 1	-83%	-66%	-50%	-39%	-30%	-25%	-20%
Scenario 1a	-83%	-66%	-50%	-46%	-58%	-55%	-50%
Scenario 2	-86%	-77%	-71%	-65%	-58%	-50%	-40%
Scenario 2a	-86%	-77%	-71%	-67%	-64%	-63%	-61%

Load factor	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Reference	-20%	-13%	-8%	-6%	-6%	-6%	-4%
Scenario 1	-25%	-18%	-11%	-9%	-9%	-9%	-7%
Scenario 1a	-25%	-18%	-20%	-25%	-23%	-21%	-19%
Scenario 2	-30%	-25%	-23%	-20%	-17%	-14%	-10%
Scenario 2a	-30%	-25%	-23%	-23%	-21%	-21%	-19%

Domestic (world average)

Seat capacity	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Reference	-44%	-12%	1%	3%	0%	-12%	-13%
Scenario 1	-64%	-47%	-33%	-23%	-16%	-12%	-7%
Scenario 1a	-64%	-47%	-33%	-29%	-41%	-39%	-34%
Scenario 2	-66%	-55%	-49%	-43%	-37%	-29%	-19%
Scenario 2a	-66%	-55%	-49%	-46%	-43%	-41%	-39%

Load factor	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Reference	-15%	-10%	-5%	-3%	-3%	-3%	-2%
Scenario 1	-18%	-13%	-8%	-6%	-6%	-6%	-5%
Scenario 1a	-18%	-13%	-13%	-16%	-14%	-12%	-10%
Scenario 2	-21%	-16%	-11%	-9%	-9%	-9%	-8%
Scenario 2a	-21%	-16%	-15%	-13%	-13%	-13%	-13%

- Base percentages of seat capacity already incorporate short-/long-haul impacts and will be applied to Baseline numbers
- Base percentages of load factor need to be adjusted by economic factor at first and then will be added to 2019 results

- **Seat capacity (Baseline):** OAG airlines schedule data; Route Online; and airline websites
- **Seat capacity (actual):** ICAO ADS-B operational data
- **Load factor:** ICAO long-term traffic forecasts (LTF); ICAO statistical reporting forms; IATA economics data; and airline news release
- **Historical passenger traffic:** ICO Annual Report of the Council; and ICAO statistical reporting forms
- **Yield:** ICAO revenue-cost analysis of airlines (RCA); and ICAO-ICM Marketing Information Data Transfer (MIDT passenger origin-destination)
- **Macroeconomic factors:** Income elasticity of demand estimated for ICAO LTF; and IMF economic outlook data

Note 1: A list of route group is shown in **Appendix D**.

Note 2: Average air fares (i.e. passenger yield multiplied by average trip distance) for each region/route group are used to estimate gross passenger operating revenues.

Appendix C: Summary of Key Impact Indicators

Figures and estimates herein are subject to substantial changes, and will be updated with the situation evolving and more information available.

Baseline

Compared to 2019
(year-on-year)

Baseline (Originally-planned or business as usual)			
Region	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)
Africa	6.4%	8.03	1.27
Asia/Pacific	4.3%	83.35	9.85
Europe	1.9%	31.52	3.64
Latin America/Caribbean	3.6%	15.18	1.36
Middle East	2.9%	6.26	1.17
North America	3.7%	42.44	4.77
Total	3.5%	186.77	22.07

Compared to 2019
(year-on-year)

Baseline (Originally-planned or business as usual)			
Month	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)
January 2020	3.7%	15.10	1.79
February 2020	6.2%	22.41	2.69
March 2020	3.5%	15.19	1.55
April 2020	3.1%	13.74	1.61
May 2020	3.4%	14.99	1.89
June 2020	3.8%	17.63	2.06
July 2020	3.8%	18.88	2.21
August 2020	3.1%	15.61	1.91
September 2020	3.6%	16.09	1.81
October 2020	2.4%	11.54	1.37
November 2020	2.3%	10.22	1.24
December 2020	3.5%	15.38	1.92
Total	3.5%	186.77	22.07

Reference

Reference (compared to Baseline)				Reference (compared to 2019)		
Region	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)
Africa	-33.2%	-50.31	-8.27	-29.0%	-42.28	-7.00
Asia/Pacific	-27.6%	-605.16	-76.94	-24.5%	-521.81	-67.08
Europe	-31.5%	-467.56	-58.24	-30.2%	-436.04	-54.60
Latin America/Caribbean	-28.5%	-124.38	-16.22	-25.9%	-109.21	-14.86
Middle East	-31.2%	-75.77	-12.33	-29.2%	-69.51	-11.16
North America	-22.6%	-325.52	-47.79	-19.8%	-283.08	-43.02
Total	-27.9%	-1,648.70	-219.79	-25.4%	-1,461.93	-197.72

Reference (compared to Baseline)				Reference (compared to 2019)		
Month	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)
January 2020	-3.6%	-13.37	-0.83	-0.1%	1.73	0.96
February 2020	-15.9%	-72.92	-8.32	-10.6%	-50.52	-5.64
March 2020	-39.0%	-217.46	-27.70	-36.9%	-202.26	-26.15
April 2020	-82.3%	-344.62	-44.43	-81.7%	-330.88	-42.82
May 2020	-81.6%	-348.56	-45.31	-80.9%	-333.57	-43.42
June 2020	-58.3%	-277.59	-38.63	-56.7%	-259.95	-36.56
July 2020	-16.5%	-122.20	-17.99	-13.3%	-103.33	-15.78
August 2020	-7.3%	-62.68	-10.26	-4.4%	-47.07	-8.35
September 2020	-2.5%	-31.04	-5.57	1.0%	-14.95	-3.76
October 2020	-3.1%	-33.30	-5.23	-0.8%	-21.76	-3.86
November 2020	-11.5%	-60.30	-7.37	-9.4%	-50.09	-6.13
December 2020	-13.5%	-64.67	-8.13	-10.4%	-49.29	-6.21
Total	-27.9%	-1,648.70	-219.79	-25.4%	-1,461.93	-197.72



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Estimated results: Scenario 1 (World total)

Compared to Baseline (business as usual)	Scenario 1 Path 1			Scenario 1 Path 1a		
Region	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)
Africa	-48.0%	-69.16	-11.93	-55.6%	-81.40	-13.95
Asia/Pacific	-36.8%	-786.03	-96.75	-43.8%	-945.21	-116.88
Europe	-46.2%	-649.94	-80.54	-54.2%	-772.39	-95.82
Latin America/Caribbean	-42.2%	-176.29	-22.08	-50.3%	-211.99	-26.25
Middle East	-49.6%	-111.68	-18.45	-56.2%	-128.96	-21.27
North America	-34.0%	-454.35	-66.98	-40.9%	-545.55	-79.40
Total	-39.9%	-2,247.45	-296.72	-47.2%	-2,685.49	-353.56

Compared to Baseline (business as usual)	Scenario 1 Path 1			Scenario 1 Path 1a		
Month	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)
January 2020	-3.6%	-13.37	-0.83	-3.6%	-13.37	-0.83
February 2020	-15.9%	-72.92	-8.32	-15.9%	-72.92	-8.32
March 2020	-39.0%	-217.46	-27.70	-39.0%	-217.46	-27.70
April 2020	-82.3%	-344.62	-44.43	-82.3%	-344.62	-44.43
May 2020	-81.6%	-348.56	-45.31	-81.6%	-348.56	-45.31
June 2020	-72.1%	-330.13	-43.51	-72.1%	-330.13	-43.51
July 2020	-55.1%	-283.95	-37.99	-55.1%	-283.95	-37.99
August 2020	-40.1%	-209.20	-28.55	-40.1%	-227.62	-31.11
September 2020	-29.9%	-147.30	-20.16	-36.5%	-206.91	-28.02
October 2020	-21.9%	-116.74	-16.23	-48.0%	-237.96	-31.62
November 2020	-17.0%	-89.40	-12.75	-45.6%	-204.72	-27.50
December 2020	-12.6%	-73.82	-10.93	-40.8%	-197.29	-27.20
Total	-39.9%	-2,247.45	-296.72	-47.2%	-2,685.49	-353.56

Compared to 2019 (year-on-year)	Scenario 1 Path 1			Scenario 1 Path 1a		
Region	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)
Africa	-44.7%	-61.13	-10.66	-52.8%	-73.37	-12.68
Asia/Pacific	-34.0%	-702.68	-86.89	-41.3%	-861.86	-107.03
Europe	-45.1%	-618.42	-76.90	-53.3%	-740.87	-92.18
Latin America/Caribbean	-40.1%	-161.11	-20.72	-48.4%	-196.81	-24.88
Middle East	-48.1%	-105.42	-17.28	-54.9%	-122.70	-20.10
North America	-31.6%	-411.91	-62.21	-38.7%	-503.11	-74.62
Total	-37.7%	-2,060.68	-274.66	-45.3%	-2,498.73	-331.50

Compared to 2019 (year-on-year)	Scenario 1 Path 1			Scenario 1 Path 1a		
Month	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)
January 2020	-0.1%	1.73	0.96	-0.1%	1.73	0.96
February 2020	-10.6%	-50.52	-5.64	-10.6%	-50.52	-5.64
March 2020	-36.9%	-202.26	-26.15	-36.9%	-202.26	-26.15
April 2020	-81.7%	-330.88	-42.82	-81.7%	-330.88	-42.82
May 2020	-80.9%	-333.57	-43.42	-80.9%	-333.57	-43.42
June 2020	-71.0%	-312.49	-41.45	-71.0%	-312.49	-41.45
July 2020	-53.4%	-265.07	-35.77	-53.4%	-265.07	-35.77
August 2020	-38.2%	-193.59	-26.64	-38.2%	-212.01	-29.20
September 2020	-27.4%	-131.21	-18.35	-34.2%	-190.82	-26.21
October 2020	-20.0%	-105.20	-14.86	-46.8%	-226.42	-30.25
November 2020	-15.0%	-79.18	-11.51	-44.3%	-194.50	-26.26
December 2020	-9.5%	-58.44	-9.01	-38.7%	-181.91	-25.28
Total	-37.7%	-2,060.68	-274.66	-45.3%	-2,498.73	-331.50



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UNITING AVIATION

Estimated results: Scenario 2 (World total)

Compared to Baseline (business as usual)	Scenario 2 Path 2			Scenario 2 Path 2a		
Region	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)
Africa	-59.5%	-84.05	-14.45	-63.0%	-88.98	-15.23
Asia/Pacific	-45.2%	-953.46	-117.96	-48.3%	-1,020.68	-126.10
Europe	-58.0%	-799.71	-99.04	-61.4%	-845.32	-104.67
Latin America/Caribbean	-53.4%	-217.96	-27.05	-57.2%	-233.48	-28.80
Middle East	-60.7%	-134.26	-22.16	-63.8%	-140.99	-23.24
North America	-41.6%	-541.03	-79.72	-45.1%	-585.46	-85.55
Total	-49.4%	-2,730.47	-360.38	-52.7%	-2,914.90	-383.59

Compared to Baseline (business as usual)	Scenario 2 Path 2			Scenario 2 Path 2a		
Month	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)
January 2020	-3.6%	-13.37	-0.83	-3.6%	-13.37	-0.83
February 2020	-15.9%	-72.92	-8.32	-15.9%	-72.92	-8.32
March 2020	-39.0%	-217.46	-27.70	-39.0%	-217.46	-27.70
April 2020	-82.3%	-344.62	-44.43	-82.3%	-344.62	-44.43
May 2020	-81.6%	-348.56	-45.31	-81.6%	-348.56	-45.31
June 2020	-74.3%	-341.60	-44.87	-74.3%	-341.60	-44.87
July 2020	-64.7%	-327.55	-43.61	-64.7%	-327.55	-43.61
August 2020	-58.8%	-296.49	-40.16	-58.8%	-300.97	-40.58
September 2020	-52.6%	-244.06	-32.84	-55.0%	-258.90	-34.62
October 2020	-45.6%	-216.82	-29.34	-51.7%	-245.71	-32.89
November 2020	-37.6%	-168.67	-23.23	-49.6%	-218.28	-29.46
December 2020	-27.6%	-138.36	-19.74	-48.1%	-224.97	-30.96
Total	-49.4%	-2,730.47	-360.38	-52.7%	-2,914.90	-383.59

Compared to 2019 (year-on-year)	Scenario 2 Path 2			Scenario 2 Path 2a		
Region	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)
Africa	-56.9%	-76.02	-13.17	-60.6%	-80.95	-13.96
Asia/Pacific	-42.8%	-870.11	-108.10	-46.1%	-937.33	-116.24
Europe	-57.2%	-768.19	-95.40	-60.7%	-813.80	-101.03
Latin America/Caribbean	-51.7%	-202.79	-25.69	-55.6%	-218.30	-27.44
Middle East	-59.6%	-128.00	-20.99	-62.8%	-134.73	-22.07
North America	-39.5%	-498.59	-74.95	-43.1%	-543.02	-80.78
Total	-47.6%	-2,543.70	-338.31	-51.1%	-2,728.13	-361.52

Compared to 2019 (year-on-year)	Scenario 2 Path 2			Scenario 2 Path 2a		
Month	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)
January 2020	-0.1%	1.73	0.96	-0.1%	1.73	0.96
February 2020	-10.6%	-50.52	-5.64	-10.6%	-50.52	-5.64
March 2020	-36.9%	-202.26	-26.15	-36.9%	-202.26	-26.15
April 2020	-81.7%	-330.88	-42.82	-81.7%	-330.88	-42.82
May 2020	-80.9%	-333.57	-43.42	-80.9%	-333.57	-43.42
June 2020	-73.3%	-323.97	-42.81	-73.3%	-323.97	-42.81
July 2020	-63.4%	-308.67	-41.40	-63.4%	-308.67	-41.40
August 2020	-57.5%	-280.88	-38.24	-57.5%	-285.36	-38.66
September 2020	-50.9%	-227.97	-31.02	-53.3%	-242.81	-32.81
October 2020	-44.3%	-205.28	-27.97	-50.5%	-234.17	-31.52
November 2020	-36.1%	-158.45	-21.99	-48.4%	-208.07	-28.22
December 2020	-25.0%	-122.98	-17.82	-46.3%	-209.59	-29.04
Total	-47.6%	-2,543.70	-338.31	-51.1%	-2,728.13	-361.52

Baseline

Compared to 2019
(year-on-year)

Baseline (Originally-planned or business as usual)			
Region	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)
Africa	7.5%	6.14	1.10
Asia/Pacific	5.4%	29.62	6.05
Europe	2.8%	30.98	3.60
Latin America/Caribbean	0.0%	0.53	0.17
Middle East	4.6%	7.59	1.30
North America	-2.2%	-3.21	-0.53
Total	3.2%	71.65	11.69

Compared to 2019
(year-on-year)

Baseline (Originally-planned or business as usual)			
Month	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)
January 2020	3.0%	5.13	0.95
February 2020	6.0%	8.56	1.47
March 2020	3.3%	5.74	0.75
April 2020	3.2%	5.85	0.90
May 2020	3.2%	5.78	1.06
June 2020	3.7%	7.39	1.09
July 2020	3.1%	6.99	1.09
August 2020	3.1%	6.84	1.13
September 2020	2.9%	5.74	0.87
October 2020	1.8%	3.67	0.63
November 2020	2.1%	3.53	0.65
December 2020	3.7%	6.41	1.09
Total	3.2%	71.65	11.69

Reference

Region	Reference (compared to Baseline)			Reference (compared to 2019)		
	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)
Africa	-30.9%	-31.82	-6.62	-25.6%	-25.68	-5.52
Asia/Pacific	-37.4%	-238.75	-49.40	-34.0%	-209.13	-43.35
Europe	-33.7%	-369.05	-50.26	-31.9%	-338.07	-46.66
Latin America/Caribbean	-35.2%	-51.99	-10.28	-35.2%	-51.46	-10.11
Middle East	-30.5%	-60.56	-10.92	-27.3%	-52.97	-9.62
North America	-33.3%	-65.78	-17.63	-34.8%	-68.99	-18.16
Total	-34.4%	-817.94	-145.11	-32.3%	-746.30	-133.42

Month	Reference (compared to Baseline)			Reference (compared to 2019)		
	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)
January 2020	-1.2%	-0.24	0.15	1.8%	4.89	1.10
February 2020	-10.3%	-21.04	-4.03	-5.0%	-12.48	-2.55
March 2020	-48.0%	-93.55	-16.62	-46.2%	-87.81	-15.88
April 2020	-93.6%	-159.10	-28.03	-93.4%	-153.25	-27.13
May 2020	-93.3%	-161.61	-28.41	-93.1%	-155.83	-27.35
June 2020	-76.6%	-150.77	-26.38	-75.7%	-143.37	-25.29
July 2020	-22.4%	-68.56	-12.41	-20.0%	-61.57	-11.33
August 2020	-17.7%	-51.60	-9.11	-15.2%	-44.75	-7.97
September 2020	-9.7%	-29.49	-5.34	-7.1%	-23.75	-4.47
October 2020	-7.8%	-25.41	-4.60	-6.2%	-21.74	-3.97
November 2020	-11.3%	-26.74	-4.88	-9.5%	-23.21	-4.23
December 2020	-14.1%	-29.83	-5.44	-10.8%	-23.42	-4.35
Total	-34.4%	-817.94	-145.11	-32.3%	-746.30	-133.42



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UNITING AVIATION

Estimated results: Scenario 1 (International)

Compared to Baseline (business as usual)	Scenario 1 Path 1			Scenario 1 Path 1a		
Region	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)
Africa	-51.0%	-48.25	-10.07	-57.7%	-55.78	-11.67
Asia/Pacific	-45.6%	-286.77	-59.49	-54.3%	-348.10	-72.49
Europe	-48.6%	-504.91	-68.79	-56.5%	-596.30	-81.55
Latin America/Caribbean	-46.0%	-65.73	-13.00	-52.6%	-76.45	-15.12
Middle East	-50.8%	-91.96	-16.61	-57.0%	-105.61	-19.10
North America	-50.6%	-93.46	-25.08	-56.2%	-105.51	-28.31
Total	-48.1%	-1,091.08	-193.04	-55.7%	-1,287.75	-228.23

Compared to Baseline (business as usual)	Scenario 1 Path 1			Scenario 1 Path 1a		
Month	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)
January 2020	-1.2%	-0.24	0.15	-1.2%	-0.24	0.15
February 2020	-10.3%	-21.04	-4.03	-10.3%	-21.04	-4.03
March 2020	-48.0%	-93.55	-16.62	-48.0%	-93.55	-16.62
April 2020	-93.6%	-159.10	-28.03	-93.6%	-159.10	-28.03
May 2020	-93.3%	-161.61	-28.41	-93.3%	-161.61	-28.41
June 2020	-83.2%	-161.57	-28.09	-83.2%	-161.57	-28.09
July 2020	-65.9%	-144.77	-25.31	-65.9%	-144.77	-25.31
August 2020	-49.7%	-112.18	-19.77	-49.7%	-122.59	-21.59
September 2020	-38.9%	-80.31	-14.14	-46.4%	-110.02	-19.29
October 2020	-30.3%	-64.09	-11.47	-58.0%	-117.07	-20.74
November 2020	-25.2%	-49.10	-9.12	-55.4%	-97.39	-17.92
December 2020	-20.1%	-43.51	-8.18	-50.4%	-98.80	-18.33
Total	-48.1%	-1,091.08	-193.04	-55.7%	-1,287.75	-228.23

Compared to 2019 (year-on-year)	Scenario 1 Path 1			Scenario 1 Path 1a		
Region	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)
Africa	-47.3%	-42.10	-8.96	-54.5%	-49.64	-10.56
Asia/Pacific	-42.7%	-257.15	-53.43	-51.9%	-318.48	-66.44
Europe	-47.2%	-473.93	-65.19	-55.3%	-565.32	-77.96
Latin America/Caribbean	-46.0%	-65.20	-12.83	-52.6%	-75.93	-14.95
Middle East	-48.5%	-84.38	-15.32	-55.1%	-98.02	-17.80
North America	-51.7%	-96.67	-25.61	-57.1%	-108.72	-28.83
Total	-46.4%	-1,019.43	-181.35	-54.3%	-1,216.10	-216.54

Compared to 2019 (year-on-year)	Scenario 1 Path 1			Scenario 1 Path 1a		
Month	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)
January 2020	1.8%	4.89	1.10	1.8%	4.89	1.10
February 2020	-5.0%	-12.48	-2.55	-5.0%	-12.48	-2.55
March 2020	-46.2%	-87.81	-15.88	-46.2%	-87.81	-15.88
April 2020	-93.4%	-153.25	-27.13	-93.4%	-153.25	-27.13
May 2020	-93.1%	-155.83	-27.35	-93.1%	-155.83	-27.35
June 2020	-82.5%	-154.18	-27.00	-82.5%	-154.18	-27.00
July 2020	-64.9%	-137.78	-24.23	-64.9%	-137.78	-24.23
August 2020	-48.1%	-105.33	-18.64	-48.1%	-115.74	-20.46
September 2020	-37.1%	-74.56	-13.27	-44.8%	-104.28	-18.42
October 2020	-29.0%	-60.43	-10.84	-57.2%	-113.40	-20.11
November 2020	-23.6%	-45.57	-8.47	-54.5%	-93.86	-17.27
December 2020	-17.1%	-37.10	-7.09	-48.6%	-92.39	-17.24
Total	-46.4%	-1,019.43	-181.35	-54.3%	-1,216.10	-216.54



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Estimated results: Scenario 2 (International)

Compared to Baseline (business as usual)	Scenario 2 Path 2			Scenario 2 Path 2a		
Region	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)
Africa	-62.3%	-57.98	-12.12	-65.4%	-60.76	-12.71
Asia/Pacific	-56.9%	-351.81	-73.22	-60.7%	-375.03	-78.15
Europe	-60.5%	-617.32	-84.27	-63.8%	-649.19	-88.78
Latin America/Caribbean	-56.5%	-79.13	-15.66	-59.6%	-83.29	-16.48
Middle East	-61.9%	-110.16	-19.92	-64.8%	-115.25	-20.84
North America	-61.4%	-110.98	-29.80	-64.0%	-115.45	-30.98
Total	-59.5%	-1,327.37	-234.98	-62.8%	-1,398.97	-247.95

Compared to Baseline (business as usual)	Scenario 2 Path 2			Scenario 2 Path 2a		
Month	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)
January 2020	-1.2%	-0.24	0.15	-1.2%	-0.24	0.15
February 2020	-10.3%	-21.04	-4.03	-10.3%	-21.04	-4.03
March 2020	-48.0%	-93.55	-16.62	-48.0%	-93.55	-16.62
April 2020	-93.6%	-159.10	-28.03	-93.6%	-159.10	-28.03
May 2020	-93.3%	-161.61	-28.41	-93.3%	-161.61	-28.41
June 2020	-85.7%	-166.40	-28.91	-85.7%	-166.40	-28.91
July 2020	-77.0%	-165.57	-28.93	-77.0%	-165.57	-28.93
August 2020	-71.2%	-157.16	-27.61	-71.2%	-157.16	-27.61
September 2020	-65.1%	-128.80	-22.54	-67.5%	-134.05	-23.45
October 2020	-58.4%	-112.32	-19.98	-64.5%	-123.28	-21.90
November 2020	-50.5%	-85.89	-15.89	-62.8%	-105.20	-19.41
December 2020	-40.0%	-75.69	-14.17	-61.1%	-111.77	-20.80
Total	-59.5%	-1,327.37	-234.98	-62.8%	-1,398.97	-247.95

Compared to 2019 (year-on-year)	Scenario 2 Path 2			Scenario 2 Path 2a		
Region	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)
Africa	-59.5%	-51.83	-11.01	-62.8%	-54.62	-11.61
Asia/Pacific	-54.6%	-322.18	-67.17	-58.6%	-345.41	-72.10
Europe	-59.4%	-586.34	-80.67	-62.8%	-618.21	-85.19
Latin America/Caribbean	-56.5%	-78.61	-15.49	-59.6%	-82.76	-16.31
Middle East	-60.2%	-102.57	-18.62	-63.2%	-107.66	-19.55
North America	-62.3%	-114.19	-30.32	-64.8%	-118.66	-31.51
Total	-58.2%	-1,255.72	-223.29	-61.6%	-1,327.32	-236.26

Compared to 2019 (year-on-year)	Scenario 2 Path 2			Scenario 2 Path 2a		
Month	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)
January 2020	1.8%	4.89	1.10	1.8%	4.89	1.10
February 2020	-5.0%	-12.48	-2.55	-5.0%	-12.48	-2.55
March 2020	-46.2%	-87.81	-15.88	-46.2%	-87.81	-15.88
April 2020	-93.4%	-153.25	-27.13	-93.4%	-153.25	-27.13
May 2020	-93.1%	-155.83	-27.35	-93.1%	-155.83	-27.35
June 2020	-85.2%	-159.01	-27.82	-85.2%	-159.01	-27.82
July 2020	-76.2%	-158.58	-27.85	-76.2%	-158.58	-27.85
August 2020	-70.3%	-150.31	-26.48	-70.3%	-150.31	-26.48
September 2020	-64.0%	-123.06	-21.67	-66.5%	-128.31	-22.57
October 2020	-57.6%	-108.66	-19.35	-63.8%	-119.61	-21.26
November 2020	-49.5%	-82.35	-15.23	-62.0%	-101.66	-18.76
December 2020	-37.8%	-69.27	-13.08	-59.7%	-105.36	-19.72
Total	-58.2%	-1,255.72	-223.29	-61.6%	-1,327.32	-236.26

Baseline

Compared to 2019
(year-on-year)

Baseline (Originally-planned or business as usual)			
Region	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)
Africa	4.4%	1.89	0.17
Asia/Pacific	3.9%	53.73	3.80
Europe	-0.4%	0.54	0.04
Latin America/Caribbean	5.6%	14.65	1.19
Middle East	-3.5%	-1.33	-0.12
North America	4.9%	45.65	5.30
Total	3.7%	115.12	10.38

Compared to 2019
(year-on-year)

Baseline (Originally-planned or business as usual)			
Month	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)
January 2020	4.1%	9.96	0.84
February 2020	6.3%	13.84	1.21
March 2020	3.7%	9.45	0.81
April 2020	3.1%	7.89	0.71
May 2020	3.6%	9.22	0.83
June 2020	3.9%	10.24	0.97
July 2020	4.3%	11.89	1.13
August 2020	3.2%	8.76	0.78
September 2020	4.1%	10.35	0.94
October 2020	2.8%	7.87	0.74
November 2020	2.5%	6.68	0.59
December 2020	3.4%	8.97	0.83
Total	3.7%	115.12	10.38

Reference

Region	Reference (compared to Baseline)			Reference (compared to 2019)		
	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)
Africa	-37.6%	-18.49	-1.65	-34.8%	-16.60	-1.48
Asia/Pacific	-23.3%	-366.41	-27.53	-20.3%	-312.68	-23.73
Europe	-25.1%	-98.51	-7.98	-25.5%	-97.97	-7.94
Latin America/Caribbean	-25.1%	-72.40	-5.95	-20.9%	-57.74	-4.76
Middle East	-33.8%	-15.21	-1.42	-36.2%	-16.54	-1.54
North America	-20.6%	-259.74	-30.16	-16.7%	-214.09	-24.86
Total	-23.2%	-830.75	-74.68	-20.4%	-715.63	-64.30

Month	Reference (compared to Baseline)			Reference (compared to 2019)		
	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)
January 2020	-5.2%	-13.12	-0.98	-1.3%	-3.16	-0.14
February 2020	-19.6%	-51.88	-4.30	-14.5%	-38.04	-3.08
March 2020	-32.9%	-123.90	-11.08	-30.4%	-114.46	-10.27
April 2020	-74.0%	-185.52	-16.40	-73.2%	-177.63	-15.69
May 2020	-73.0%	-186.95	-16.90	-72.0%	-177.74	-16.07
June 2020	-44.3%	-126.82	-12.25	-42.1%	-116.58	-11.28
July 2020	-11.9%	-53.64	-5.58	-8.1%	-41.75	-4.46
August 2020	0.9%	-11.08	-1.16	4.1%	-2.32	-0.38
September 2020	2.9%	-1.54	-0.23	7.2%	8.81	0.71
October 2020	0.2%	-7.89	-0.63	3.0%	-0.02	0.11
November 2020	-11.6%	-33.56	-2.49	-9.4%	-26.88	-1.90
December 2020	-13.1%	-34.84	-2.69	-10.1%	-25.87	-1.86
Total	-23.2%	-830.75	-74.68	-20.4%	-715.63	-64.30



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Estimated results: Scenario 1 (Domestic)

Compared to Baseline (business as usual)	Scenario 1 Path 1			Scenario 1 Path 1a		
Region	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)
Africa	-42.4%	-20.91	-1.87	-51.8%	-25.61	-2.29
Asia/Pacific	-32.8%	-499.26	-37.26	-39.1%	-597.10	-44.40
Europe	-39.1%	-145.03	-11.75	-47.6%	-176.09	-14.26
Latin America/Caribbean	-40.2%	-110.56	-9.08	-49.1%	-135.53	-11.12
Middle East	-44.9%	-19.71	-1.84	-52.8%	-23.36	-2.17
North America	-30.9%	-360.90	-41.90	-38.0%	-440.04	-51.09
Total	-33.9%	-1,156.37	-103.69	-41.0%	-1,397.74	-125.33

Compared to Baseline (business as usual)	Scenario 1 Path 1			Scenario 1 Path 1a		
Month	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)
January 2020	-5.2%	-13.12	-0.98	-5.2%	-13.12	-0.98
February 2020	-19.6%	-51.88	-4.30	-19.6%	-51.88	-4.30
March 2020	-32.9%	-123.90	-11.08	-32.9%	-123.90	-11.08
April 2020	-74.0%	-185.52	-16.40	-74.0%	-185.52	-16.40
May 2020	-73.0%	-186.95	-16.90	-73.0%	-186.95	-16.90
June 2020	-63.6%	-168.55	-15.42	-63.6%	-168.55	-15.42
July 2020	-46.8%	-139.17	-12.67	-46.8%	-139.17	-12.67
August 2020	-32.6%	-97.02	-8.78	-32.6%	-105.04	-9.52
September 2020	-23.1%	-67.00	-6.02	-29.0%	-96.89	-8.73
October 2020	-15.8%	-52.64	-4.76	-40.9%	-120.89	-10.88
November 2020	-11.5%	-40.30	-3.62	-39.1%	-107.33	-9.58
December 2020	-7.4%	-30.31	-2.75	-34.1%	-98.49	-8.87
Total	-33.9%	-1,156.37	-103.69	-41.0%	-1,397.74	-125.33

Compared to 2019 (year-on-year)	Scenario 1 Path 1			Scenario 1 Path 1a		
Region	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)
Africa	-39.9%	-19.03	-1.70	-49.7%	-23.73	-2.12
Asia/Pacific	-30.2%	-445.53	-33.46	-36.7%	-543.38	-40.59
Europe	-39.4%	-144.49	-11.70	-47.8%	-175.56	-14.22
Latin America/Caribbean	-36.9%	-95.91	-7.89	-46.2%	-120.88	-9.93
Middle East	-46.8%	-21.04	-1.96	-54.5%	-24.69	-2.30
North America	-27.5%	-315.25	-36.60	-35.0%	-394.39	-45.79
Total	-31.5%	-1,041.25	-93.31	-38.8%	-1,282.62	-114.95

Compared to 2019 (year-on-year)	Scenario 1 Path 1			Scenario 1 Path 1a		
Month	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)
January 2020	-1.3%	-3.16	-0.14	-1.3%	-3.16	-0.14
February 2020	-14.5%	-38.04	-3.08	-14.5%	-38.04	-3.08
March 2020	-30.4%	-114.46	-10.27	-30.4%	-114.46	-10.27
April 2020	-73.2%	-177.63	-15.69	-73.2%	-177.63	-15.69
May 2020	-72.0%	-177.74	-16.07	-72.0%	-177.74	-16.07
June 2020	-62.1%	-158.31	-14.45	-62.1%	-158.31	-14.45
July 2020	-44.5%	-127.28	-11.55	-44.5%	-127.28	-11.55
August 2020	-30.4%	-88.26	-8.00	-30.4%	-96.27	-8.74
September 2020	-20.0%	-56.65	-5.08	-26.1%	-86.54	-7.79
October 2020	-13.5%	-44.77	-4.02	-39.3%	-113.02	-10.14
November 2020	-9.3%	-33.61	-3.03	-37.6%	-100.65	-9.00
December 2020	-4.3%	-21.34	-1.92	-31.9%	-89.52	-8.03
Total	-31.5%	-1,041.25	-93.31	-38.8%	-1,282.62	-114.95



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Estimated results: Scenario 2 (Domestic)

Compared to Baseline (business as usual)				Scenario 2 Path 2		
Region	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)
Africa	-54.3%	-26.08	-2.33	-58.7%	-28.22	-2.52
Asia/Pacific	-40.0%	-601.65	-44.74	-42.9%	-645.65	-47.94
Europe	-50.8%	-182.39	-14.77	-54.7%	-196.13	-15.89
Latin America/Caribbean	-51.8%	-138.83	-11.39	-55.9%	-150.19	-12.33
Middle East	-56.0%	-24.10	-2.24	-59.7%	-25.74	-2.40
North America	-37.9%	-430.05	-49.93	-41.5%	-470.01	-54.57
Total	-42.1%	-1,403.10	-125.41	-45.5%	-1,515.93	-135.64

Compared to Baseline (business as usual)				Scenario 2 Path 2		
Month	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)
January 2020	-5.2%	-13.12	-0.98	-5.2%	-13.12	-0.98
February 2020	-19.6%	-51.88	-4.30	-19.6%	-51.88	-4.30
March 2020	-32.9%	-123.90	-11.08	-32.9%	-123.90	-11.08
April 2020	-74.0%	-185.52	-16.40	-74.0%	-185.52	-16.40
May 2020	-73.0%	-186.95	-16.90	-73.0%	-186.95	-16.90
June 2020	-65.5%	-175.20	-15.96	-65.5%	-175.20	-15.96
July 2020	-55.3%	-161.98	-14.68	-55.3%	-161.98	-14.68
August 2020	-49.0%	-139.34	-12.55	-49.0%	-143.81	-12.97
September 2020	-43.1%	-115.26	-10.29	-45.5%	-124.84	-11.17
October 2020	-36.5%	-104.50	-9.35	-42.6%	-122.43	-10.99
November 2020	-29.0%	-82.78	-7.34	-40.9%	-113.08	-10.05
December 2020	-19.1%	-62.67	-5.57	-39.2%	-113.21	-10.16
Total	-42.1%	-1,403.10	-125.41	-45.5%	-1,515.93	-135.64

Compared to 2019 (year-on-year)				Scenario 2 Path 2		
Region	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)
Africa	-52.2%	-24.19	-2.16	-56.8%	-26.33	-2.35
Asia/Pacific	-37.7%	-547.93	-40.93	-40.6%	-591.93	-44.14
Europe	-51.0%	-181.85	-14.73	-54.9%	-195.59	-15.84
Latin America/Caribbean	-49.1%	-124.18	-10.20	-53.4%	-135.54	-11.14
Middle East	-57.6%	-25.43	-2.37	-61.1%	-27.07	-2.52
North America	-34.9%	-384.40	-44.63	-38.7%	-424.36	-49.27
Total	-39.9%	-1,287.98	-115.03	-43.4%	-1,400.81	-125.26

Compared to 2019 (year-on-year)				Scenario 2 Path 2		
Month	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)	Seat Capacity (%)	Passenger number (million)	Passenger revenue (USD, billion)
January 2020	-1.3%	-3.16	-0.14	-1.3%	-3.16	-0.14
February 2020	-14.5%	-38.04	-3.08	-14.5%	-38.04	-3.08
March 2020	-30.4%	-114.46	-10.27	-30.4%	-114.46	-10.27
April 2020	-73.2%	-177.63	-15.69	-73.2%	-177.63	-15.69
May 2020	-72.0%	-177.74	-16.07	-72.0%	-177.74	-16.07
June 2020	-64.2%	-164.96	-14.99	-64.2%	-164.96	-14.99
July 2020	-53.4%	-150.09	-13.55	-53.4%	-150.09	-13.55
August 2020	-47.4%	-130.57	-11.77	-47.4%	-135.05	-12.19
September 2020	-40.8%	-104.91	-9.35	-43.3%	-114.50	-10.23
October 2020	-34.8%	-96.63	-8.61	-40.9%	-114.56	-10.25
November 2020	-27.3%	-76.10	-6.75	-39.4%	-106.40	-9.47
December 2020	-16.3%	-53.70	-4.74	-37.2%	-104.24	-9.32
Total	-39.9%	-1,287.98	-115.03	-43.4%	-1,400.81	-125.26



Appendix D: Estimated Results at Route Group Level

The estimates will be updated with the situation evolving and more information available.

Estimated results by route group for Jan-Apr 2020 (compared to Baseline)

Route Group	DOM/INT	Seat capacity				Scheduled passenger (thousand)				Gross revenue (USD, million)			
		Jan 2020	Feb 2020	Mar 2020	Apr 2020	Jan 2020	Feb 2020	Mar 2020	Apr 2020	Jan 2020	Feb 2020	Mar 2020	Apr 2020
Africa	Domestic	-10.0%	-7.4%	-35.5%	-96.8%	-453	-310	-1,746	-3,483	-40	-28	-156	-311
Africa - Asia/Pacific	International	4.4%	-19.3%	-46.2%	-94.7%	16	-118	-247	-381	9	-65	-136	-211
Africa - Middle East	International	-5.9%	-6.5%	-56.1%	-96.0%	-87	-182	-1,622	-2,542	-19	-40	-355	-557
Africa - North America	International	-8.6%	-2.8%	-25.9%	-87.2%	-17	-9	-89	-182	-12	-6	-65	-134
Africa & Middle East - Central America/Caribbean	International					0	0	0	0	0	0	0	0
Africa & Middle East - South America	International	1.8%	4.7%	-22.9%	-83.8%	4	-8	-55	-115	1	-3	-23	-48
Central America/Caribbean	Domestic	-2.8%	-3.0%	-20.9%	-84.0%	-108	-158	-1,606	-4,609	-8	-12	-120	-346
Central America/Caribbean - Europe	International	-0.9%	0.5%	-19.3%	-94.6%	21	11	-540	-1,411	7	4	-184	-482
Central America/Caribbean - North America	International	4.7%	4.4%	-20.5%	-91.3%	446	318	-3,552	-7,722	70	50	-557	-1,212
Central America/Caribbean - South America	International	5.1%	9.8%	-26.2%	-96.6%	71	104	-485	-1,236	13	19	-89	-226
China	Domestic	-10.5%	-75.5%	-60.3%	-55.7%	-8,755	-47,168	-37,369	-32,255	-770	-4,151	-3,288	-2,838
China - Europe	International	1.8%	-52.1%	-74.1%	-93.1%	59	-929	-1,553	-2,019	18	-282	-471	-613
China - Middle East	International	5.2%	-56.5%	-76.6%	-91.8%	36	-335	-495	-576	9	-82	-121	-141
China - North America	International	2.9%	-45.0%	-66.4%	-92.4%	47	-680	-1,106	-1,520	19	-273	-444	-610
China & South West Asia - North Asia	International	-0.9%	-43.7%	-84.3%	-89.6%	-113	-3,485	-6,026	-5,814	-20	-620	-1,072	-1,034
China & South West Asia - Pacific South East Asia	International	-2.2%	-47.5%	-72.1%	-91.0%	-354	-5,734	-8,323	-9,223	-77	-1,241	-1,801	-1,996
Europe	Domestic	-7.4%	-7.4%	-37.5%	-89.2%	-2,124	-2,212	-13,081	-24,025	-172	-179	-1,060	-1,946
Europe - Middle East	International	0.8%	-0.5%	-43.9%	-89.8%	298	-9	-4,279	-7,405	55	-2	-787	-1,363

Estimated results by route group for Jan-Apr 2020 (compared to Baseline)

Route Group	DOM/INT	Seat capacity				Scheduled passenger (thousand)				Gross revenue (USD, million)			
		Jan 2020	Feb 2020	Mar 2020	Apr 2020	Jan 2020	Feb 2020	Mar 2020	Apr 2020	Jan 2020	Feb 2020	Mar 2020	Apr 2020
Europe - North Africa	International	-0.1%	0.9%	-41.0%	-97.8%	50	-5	-1,846	-4,107	7	-1	-272	-605
Europe - North America	International	5.0%	4.6%	-34.5%	-91.3%	431	249	-3,111	-7,233	135	78	-976	-2,270
Europe - North Asia	International	4.9%	4.5%	-42.1%	-89.7%	57	-11	-546	-1,074	27	-5	-256	-503
Europe - Pacific South East Asia	International	-3.3%	-0.6%	-14.4%	-91.6%	-37	-102	-576	-1,407	-18	-51	-288	-703
Europe - South America	International	-5.6%	-5.5%	-37.2%	-95.6%	-49	-69	-697	-1,359	-18	-25	-249	-486
Europe - South West Asia	International	1.1%	2.2%	-36.8%	-90.0%	44	-61	-988	-1,788	12	-16	-266	-482
Europe - Sub Saharan Africa	International	2.4%	2.6%	-26.9%	-90.4%	92	42	-765	-1,585	39	18	-324	-671
Intra Africa	International	-10.4%	-10.7%	-44.4%	-95.5%	-288	-381	-1,391	-2,438	-38	-50	-182	-318
Intra Central America/Caribbean	International	4.5%	3.6%	-27.5%	-89.8%	67	40	-595	-1,335	6	3	-50	-111
Intra China & South West Asia	International	-10.3%	-60.8%	-79.0%	-88.8%	-538	-3,067	-4,091	-4,524	-69	-390	-521	-576
Intra Europe	International	-2.3%	-3.7%	-46.5%	-96.4%	-180	-2,303	-29,696	-59,326	-18	-234	-3,023	-6,040
Intra Middle East	International	-6.1%	-6.0%	-68.2%	-94.8%	-73	-219	-2,734	-3,724	-8	-25	-313	-426
Intra North America	International	3.3%	2.7%	-23.6%	-93.4%	111	14	-1,295	-2,750	15	2	-173	-367
Intra North Asia	International	-2.2%	-2.7%	-78.8%	-96.4%	-34	-224	-1,094	-1,673	-2	-12	-59	-90
Intra Pacific South East Asia	International	-1.3%	-5.5%	-45.6%	-94.9%	-151	-1,639	-5,038	-7,820	-23	-244	-750	-1,164
Intra South America	International	-9.5%	-7.3%	-39.9%	-96.9%	-195	-144	-934	-1,702	-34	-25	-162	-296
Latin America/Caribbean - China	International	5.0%				0	0	0	0	0	0	0	0
Latin America/Caribbean - North Asia & Pacific South East Asia	International	2.9%	0.2%	-17.9%	-78.9%	2	-8	-30	-65	1	-5	-20	-44

Estimated results by route group for Jan-Apr 2020 (compared to Baseline)

Route Group	DOM/INT	Seat capacity				Scheduled passenger (thousand)				Gross revenue (USD, million)			
		Jan 2020	Feb 2020	Mar 2020	Apr 2020	Jan 2020	Feb 2020	Mar 2020	Apr 2020	Jan 2020	Feb 2020	Mar 2020	Apr 2020
Middle East	Domestic	-10.0%	-5.8%	-44.5%	-96.0%	-101	-198	-1,792	-3,445	-9	-18	-167	-321
Middle East - North America	International	2.0%	2.6%	-27.4%	-90.2%	42	20	-339	-731	20	10	-161	-348
Middle East - North Asia & Pacific South East Asia	International	-1.5%	-2.3%	-36.1%	-82.1%	-22	-331	-1,360	-2,220	-6	-89	-364	-595
Middle East - South West Asia	International	-3.1%	-1.6%	-44.1%	-96.6%	-132	-627	-2,951	-4,849	-21	-99	-466	-766
North America	Domestic	1.8%	5.0%	-14.5%	-67.1%	2,721	4,165	-36,740	-58,164	316	484	-4,266	-6,753
North America - North Asia	International	5.0%	5.1%	-25.1%	-85.1%	68	-89	-618	-1,290	21	-28	-195	-407
North America - Pacific South East Asia	International	4.1%	5.9%	-17.8%	-88.7%	31	-45	-295	-635	25	-36	-235	-507
North America - South America	International	4.9%	5.0%	-27.6%	-94.0%	79	59	-618	-1,265	31	23	-243	-498
North America - South West Asia	International	3.6%	4.8%	-28.3%	-92.0%	7	-13	-94	-181	5	-10	-69	-133
North Asia	Domestic	0.3%	-2.5%	-19.2%	-54.9%	174	-961	-6,791	-7,770	9	-48	-340	-389
North Asia - Pacific South East Asia	International	-0.2%	-7.6%	-63.6%	-89.1%	-47	-1,069	-3,478	-3,874	-12	-276	-899	-1,001
Pacific South East Asia	Domestic	-7.4%	-8.2%	-30.6%	-88.2%	-1,554	-2,646	-11,924	-24,195	-95	-162	-731	-1,483
South America	Domestic	-8.9%	-9.2%	-39.9%	-94.8%	-1,275	-1,462	-7,129	-13,960	-108	-123	-602	-1,178
South West Asia	Domestic	-10.0%	-4.3%	-30.9%	-98.8%	-1,650	-935	-5,728	-13,608	-101	-57	-351	-834
Domestic		-5.2%	-19.6%	-32.9%	-74.0%	-13,125	-51,883	-123,905	-185,516	-980	-4,295	-11,080	-16,398
International		-1.2%	-10.3%	-48.0%	-93.6%	-241	-21,041	-93,550	-159,099	151	-4,030	-16,623	-28,033
Total		-3.6%	-15.9%	-39.0%	-82.3%	-13,366	-72,924	-217,455	-344,615	-829	-8,325	-27,703	-44,432

*: April results are preliminary.



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Estimated results by route group for Jan-Apr 2020 (compared to Jan-Apr 2019)

Route Group	DOM/INT	Seat capacity				Scheduled passenger (thousand)				Gross revenue (USD, million)			
		Jan 2020	Feb 2020	Mar 2020	Apr 2020	Jan 2020	Feb 2020	Mar 2020	Apr 2020	Jan 2020	Feb 2020	Mar 2020	Apr 2020
Africa	Domestic	-4.9%	0.0%	-32.4%	-96.7%	-249	-48	-1,567	-3,390	-22	-4	-140	-303
Africa - Asia/Pacific	International	18.1%	-1.2%	-37.9%	-94.0%	67	-47	-192	-336	37	-26	-106	-185
Africa - Middle East	International	7.2%	9.6%	-50.1%	-95.6%	248	169	-1,306	-2,290	54	37	-286	-502
Africa - North America	International	7.6%	22.2%	-13.0%	-86.0%	16	28	-57	-165	12	21	-42	-121
Africa & Middle East - Central America/Caribbean	International		-100.0%			0	0	0	0	0	0	0	0
Africa & Middle East - South America	International	-5.7%	1.9%	-26.8%	-81.8%	-7	-12	-62	-101	-3	-5	-26	-42
Central America/Caribbean	Domestic	9.2%	11.7%	-12.0%	-82.8%	452	461	-1,094	-4,257	34	35	-82	-319
Central America/Caribbean - Europe	International	-1.7%	2.6%	-21.0%	-94.4%	12	42	-568	-1,347	4	14	-194	-460
Central America/Caribbean - North America	International	0.0%	3.9%	-24.4%	-91.5%	95	318	-3,971	-7,802	15	50	-623	-1,224
Central America/Caribbean - South America	International	3.6%	8.4%	-28.4%	-96.4%	52	90	-522	-1,176	10	16	-95	-215
China	Domestic	-3.7%	-73.4%	-58.0%	-55.7%	-4,801	-42,509	-34,245	-32,074	-422	-3,741	-3,014	-2,823
China - Europe	International	4.0%	-49.0%	-73.1%	-93.1%	101	-821	-1,481	-2,017	31	-249	-449	-612
China - Middle East	International	6.4%	-56.4%	-77.1%	-91.8%	45	-332	-505	-577	11	-81	-124	-141
China - North America	International	-5.7%	-48.2%	-70.1%	-92.8%	-92	-761	-1,282	-1,598	-37	-306	-515	-642
China & South West Asia - North Asia	International	21.7%	-31.8%	-81.5%	-89.1%	1,237	-2,322	-4,988	-5,500	220	-413	-887	-978
China & South West Asia - Pacific South East Asia	International	6.7%	-45.6%	-71.3%	-91.0%	657	-5,325	-7,990	-9,137	142	-1,153	-1,729	-1,978
Europe	Domestic	-8.4%	-7.3%	-38.3%	-89.1%	-2,220	-2,063	-13,238	-23,808	-180	-167	-1,072	-1,928
Europe - Middle East	International	4.9%	6.1%	-42.6%	-89.6%	598	426	-4,090	-7,269	110	78	-753	-1,338

Estimated results by route group for Jan-Apr 2020 (compared to Jan-Apr 2019)

Route Group	DOM/INT	Seat capacity				Scheduled passenger (thousand)				Gross revenue (USD, million)			
		Jan 2020	Feb 2020	Mar 2020	Apr 2020	Jan 2020	Feb 2020	Mar 2020	Apr 2020	Jan 2020	Feb 2020	Mar 2020	Apr 2020
Europe - North Africa	International	-0.9%	5.6%	-42.3%	-97.7%	55	161	-1,892	-3,815	8	24	-279	-562
Europe - North America	International	-0.6%	4.1%	-36.2%	-91.3%	119	226	-3,280	-7,272	37	71	-1,029	-2,282
Europe - North Asia	International	4.3%	6.4%	-41.9%	-89.4%	53	7	-539	-1,032	25	3	-253	-484
Europe - Pacific South East Asia	International	5.5%	6.7%	-19.2%	-91.3%	120	17	-671	-1,354	60	8	-335	-676
Europe - South America	International	-2.7%	0.0%	-36.9%	-95.4%	-3	6	-686	-1,308	-1	2	-245	-468
Europe - South West Asia	International	-8.3%	-3.9%	-43.0%	-89.9%	-143	-168	-1,188	-1,761	-39	-45	-320	-475
Europe - Sub Saharan Africa	International	0.6%	5.2%	-27.5%	-90.4%	62	84	-779	-1,587	26	36	-330	-672
Intra Africa	International	1.5%	5.3%	-36.4%	-95.0%	29	-17	-1,054	-2,178	4	-2	-138	-284
Intra Central America/Caribbean	International	1.1%	3.9%	-30.3%	-90.0%	22	48	-647	-1,364	2	4	-54	-114
Intra China & South West Asia	International	-2.0%	-57.0%	-76.9%	-87.4%	-105	-2,643	-3,640	-3,975	-13	-336	-463	-506
Intra Europe	International	-0.6%	3.4%	-43.0%	-96.3%	946	1,062	-26,168	-56,807	96	108	-2,664	-5,784
Intra Middle East	International	-2.4%	-0.4%	-66.7%	-94.5%	91	-13	-2,559	-3,501	10	-2	-293	-401
Intra North America	International	-4.0%	-1.1%	-29.5%	-93.6%	-76	-67	-1,527	-2,822	-10	-9	-204	-377
Intra North Asia	International	-32.5%	-31.0%	-85.0%	-96.6%	-617	-709	-1,627	-1,756	-33	-38	-87	-94
Intra Pacific South East Asia	International	7.1%	2.0%	-42.7%	-94.7%	540	-1,063	-4,605	-7,490	80	-158	-686	-1,115
Intra South America	International	-9.5%	-3.7%	-37.3%	-96.5%	-183	-69	-851	-1,520	-32	-12	-148	-264
Latin America/Caribbean - China	International	-66.0%	-100.0%	-100.0%	-100.0%	-6	-8	-8	-10	-4	-6	-6	-8
Latin America/Caribbean - North Asia & Pacific South East Asia	International	2.9%	0.7%	-19.3%	-77.2%	2	-8	-31	-60	2	-5	-21	-40

Estimated results by route group for Jan-Apr 2020 (compared to Jan-Apr 2019)

Route Group	DOM/INT	Seat capacity				Scheduled passenger (thousand)				Gross revenue (USD, million)			
		Jan 2020	Feb 2020	Mar 2020	Apr 2020	Jan 2020	Feb 2020	Mar 2020	Apr 2020	Jan 2020	Feb 2020	Mar 2020	Apr 2020
Middle East	Domestic	-15.5%	-8.5%	-48.1%	-96.0%	-312	-278	-2,009	-3,437	-29	-26	-187	-320
Middle East - North America	International	4.8%	6.6%	-27.6%	-90.0%	63	46	-340	-713	30	22	-162	-339
Middle East - North Asia & Pacific South East Asia	International	-0.5%	2.8%	-36.0%	-81.4%	13	-208	-1,346	-2,117	3	-56	-361	-567
Middle East - South West Asia	International	2.9%	9.5%	-39.7%	-96.3%	184	-140	-2,570	-4,392	29	-22	-406	-694
North America	Domestic	4.8%	11.5%	-12.4%	-65.6%	4,820	8,058	-34,585	-54,703	560	936	-4,015	-6,351
North America - North Asia	International	3.5%	5.0%	-26.7%	-84.8%	51	-87	-642	-1,262	16	-27	-203	-398
North America - Pacific South East Asia	International	6.5%	13.0%	-18.2%	-88.8%	52	-1	-296	-641	41	-1	-236	-511
North America - South America	International	-8.0%	-2.8%	-34.1%	-94.1%	-115	-35	-744	-1,279	-45	-14	-293	-504
North America - South West Asia	International	20.4%	24.4%	-14.9%	-88.7%	35	15	-63	-125	26	11	-47	-92
North Asia	Domestic	3.1%	2.3%	-18.5%	-54.5%	542	-397	-6,581	-7,596	27	-20	-329	-380
North Asia - Pacific South East Asia	International	15.9%	8.6%	-59.9%	-88.9%	674	-365	-3,036	-3,793	174	-94	-784	-980
Pacific South East Asia	Domestic	-1.2%	0.5%	-26.2%	-87.5%	151	-470	-10,272	-22,602	9	-29	-629	-1,385
South America	Domestic	-7.2%	-5.1%	-35.7%	-94.5%	-823	-718	-6,020	-13,004	-69	-61	-508	-1,097
South West Asia	Domestic	-5.5%	0.5%	-27.4%	-98.7%	-720	-76	-4,844	-12,758	-44	-5	-297	-782
Domestic		-1.3%	-14.5%	-30.4%	-73.2%	-3,160	-38,039	-114,455	-177,629	-137	-3,082	-10,274	-15,688
International		1.8%	-5.0%	-46.2%	-93.4%	4,893	-12,477	-87,807	-153,250	1,098	-2,555	-15,876	-27,129
Total		-0.1%	-10.6%	-36.9%	-81.7%	1,732	-50,516	-202,262	-330,879	961	-5,637	-26,150	-42,817

*: April results are preliminary.



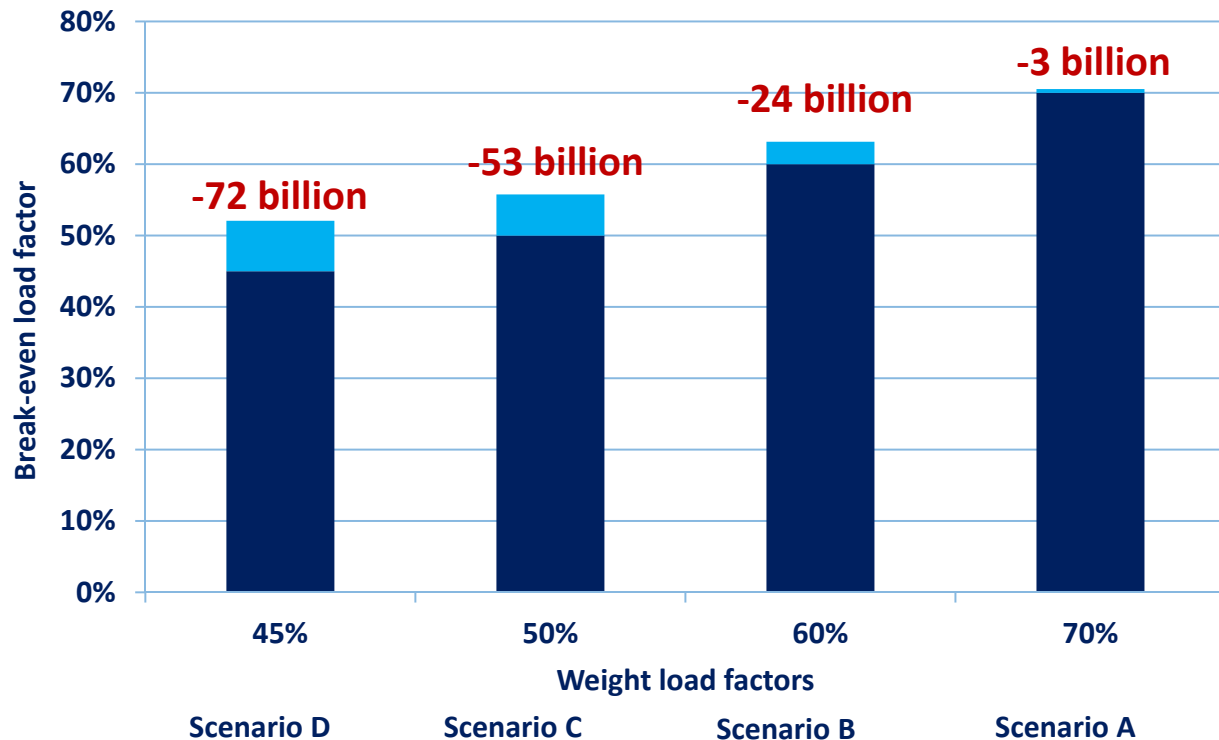
Appendix E: Airline Financial Analysis

Figures and estimates herein are subject to substantial changes, and will be updated with the situation evolving and more information available.

Scenarios are based on the assumption that air traffic, measured in Revenue Tonnes-Kilometres (RTKs, both international and domestic), will **decrease by 50% in 2020** compared to 2019

	Scenario A Weight load factor = 70%	Scenario B Weight load factor = 60%	Scenario C Weight load factor = 50%	Scenario D Weight load factor = 45%
	Load factor remains high, rebound of demand in Q3 and Q4 with severe capacity cuts	Load factor moderate-high and rebound during Q4, with capacity cuts in all regions	Low load factor and moderate return of normal capacity in Q3 and Q4	Low load factors (social distancing) and airlines increase capacity in Q2 2020
Total capacity reduction	-51%	-42%	-31%	-23%
Fuel costs (USD, billion) <i>Oil price: 49% decrease compared to 2019 levels</i>	46	54	65	72
Break-even weight load factor <i>(excluding depreciation and amortization costs)</i>	70.5%	63.1%	55.8%	52.1%

Airlines close to break even as load factor increases



Operating loss
Excluding
depreciation and
amortizations
costs

**Difference between
load factor and break-
even load factors in
each scenario**



Appendix F: Summary of Analysis by Other Organizations

ACI: Airport would lose USD 97.4 billion revenues in 2020

Region	Passenger number - both international and domestic for full year 2020		Airport revenue - both aeronautical and non-aeronautical for full year 2020	
	million and % change from 2020 "business as usual" baseline scenario		USD billion and % change from 2020 "business as usual" baseline scenario	
Africa	-114	-47.3%	-2.2	-51.2%
Asia/Pacific	-1,797	-52.9%	-29.4	-58.9%
Europe	-1,416	-57.1%	-37.1	-62.6%
Latin America/Caribbean	-289	-44.2%	-5.3	-50.5%
Middle East	-201	-46.9%	-7.0	-53.0%
North America	-859	-41.1%	-16.4	-47.3%
Total	-4,676	-50.4%	-97.4	-56.7%

<https://aci.aero/wp-content/uploads/2020/05/200505-Third-Economic-Impact-Bulletin-FINAL.pdf>



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IATA: Airlines would lose USD 314 billion revenues under “3-month lock-down + recession” scenario

The analytical difference between ICAO and IATA estimates:

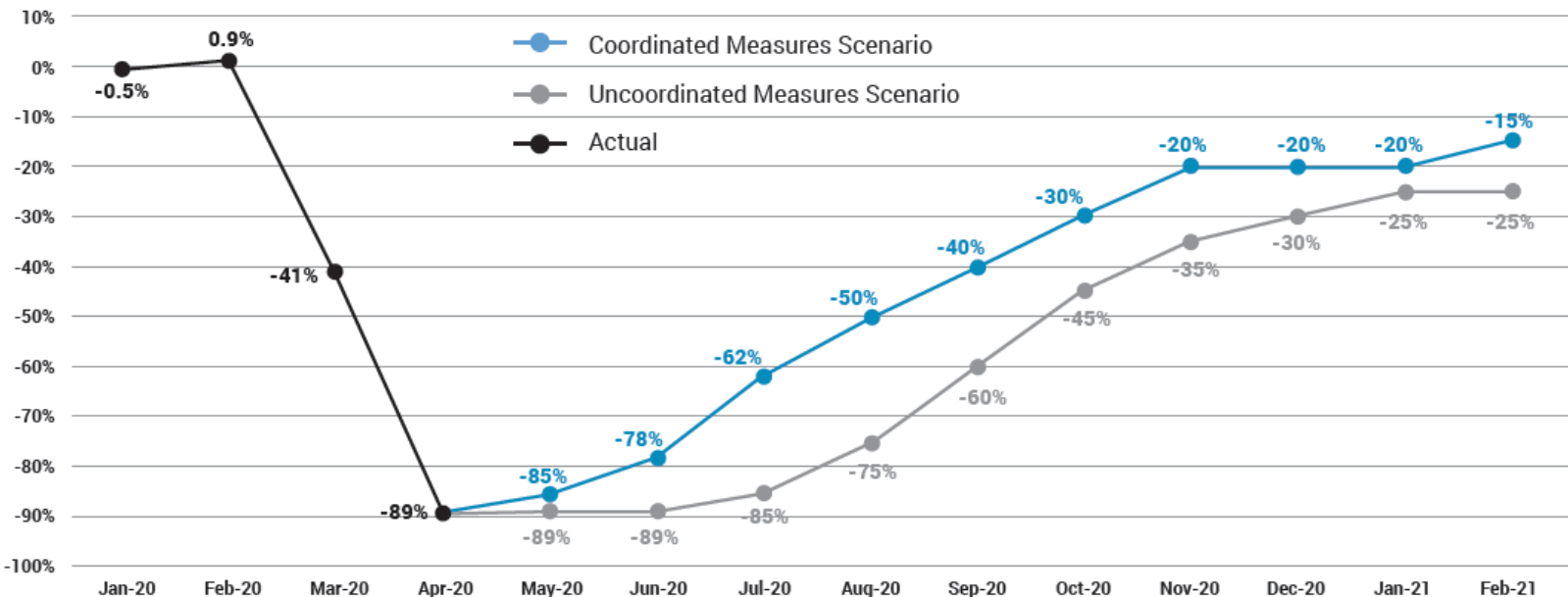
- **Regional break-down:** by all traffic from States in each region (ICAO) vs. region of airline registration (IATA)
- **Baseline:** originally-planned i.e. 2020 business as usual scenario (ICAO) vs. 2019 level with 2020 airline schedules (IATA)

Region of airline registration	Revenue Passenger Kilometres (RPKs) - both international and domestic for full year 2020	Gross passenger revenue - both international and domestic for full year 2020
	year-on-year % change from 2019 level	USD billion, compared to 2019 level
Africa	-51%	-6
Asia/Pacific	-50%	-113
Europe	-55%	-89
Latin America/Caribbean	-49%	-18
Middle East	-51%	-24
North America	-36%	-64
Total	-48%	-314

<https://www.iata.org/en/iata-repository/publications/economic-reports/covid-fourth-impact-assessment/>

EUOCONTROL: A loss of € 110 billion for airlines, airports and ANSPs in Europe in 2020

EUROCONTROL Draft Traffic Scenarios - 24 April 2020 (base year 2019)

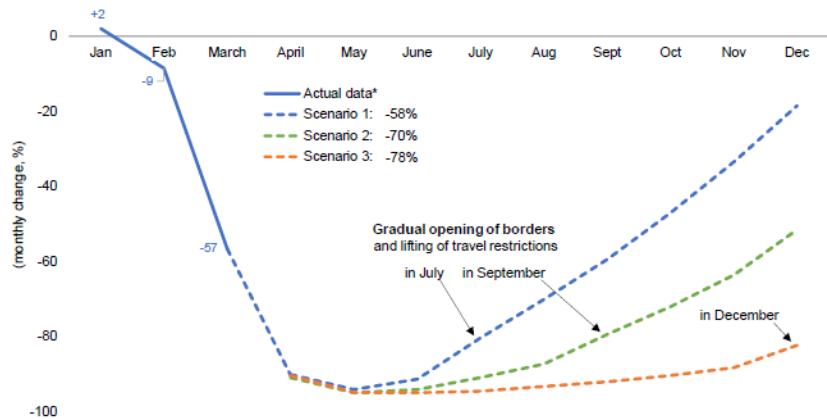


The Coordinated Measures Scenario envisages a loss of 45% of flights (5 million) in 2020, while the Uncoordinated Measures Scenario would result in the loss of 57% of flights (6.2 million).

<https://www.eurocontrol.int/covid19#traffic-scenarios>

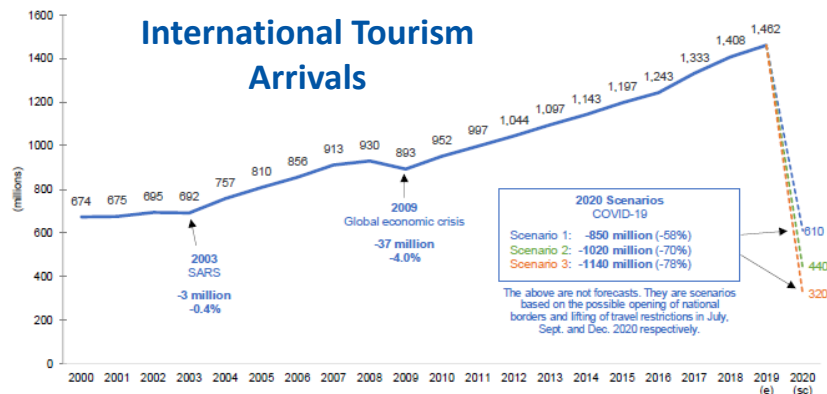
UNWTO: A loss of USD 910 to 1,170 billion in international tourism receipts in 2020

Three scenarios dependent upon re-opening of borders International Tourism Arrivals (year-on-year % change from 2019 level)

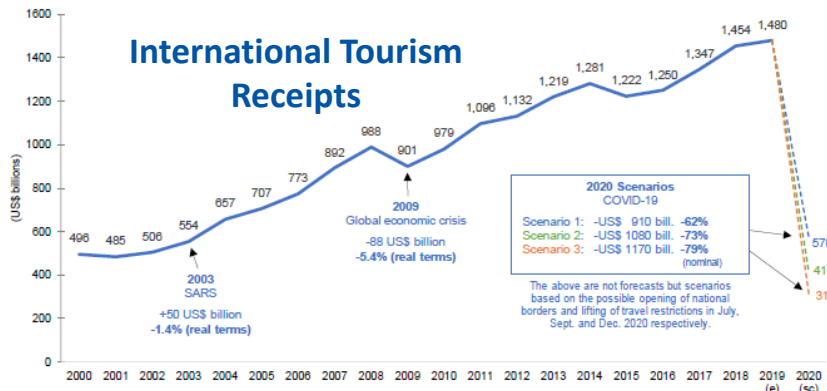


<https://webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2020-05/Barometer%20-%20May%202020%20-%20Short.pdf>

International Tourism Arrivals



International Tourism Receipts



WTTC: A loss of 100 million jobs in travel and tourism sector in 2020

2020 forecasts – COVID-19 impact on travel and tourism sector

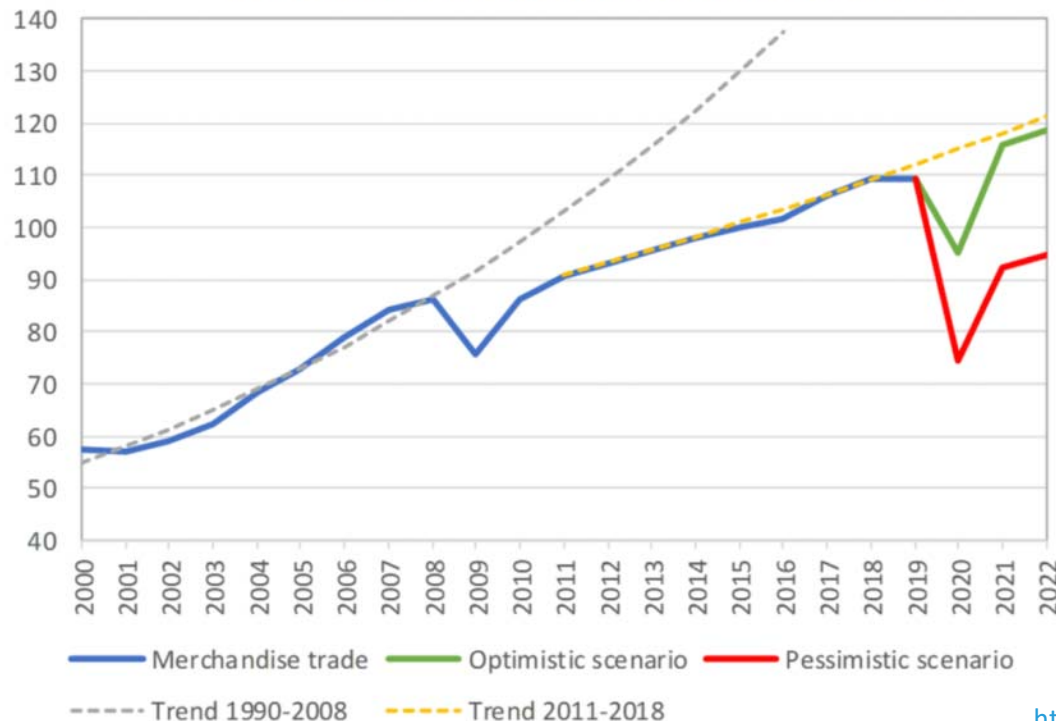
Region	Potential Total Job Losses (million)	Total GDP Loss (USD billion*)
Africa	-7.6	-52.8
Asia/Pacific	-63.4	-1,041.0
Europe	-13.0	-708.5
Latin America/Caribbean	-5.9	-110.2
Middle East	-2.6	-96.2
North America	-8.2	-680.7
Total	-100.8	-2689.4

* based on 2019 prices and exchange rates

<https://wtcc.org/About/News-Media/Press-Releases>

Index, 2015=100

World merchandise trade volume, 2000-2022



- World merchandise trade is set to plummet by between 13 and 32% in 2020 due to the COVID-19 pandemic.
- A 2021 recovery in trade is expected, but dependent on the duration of the outbreak and the effectiveness of the policy responses.
- Nearly all regions will suffer double-digit declines in trade volumes in 2020, with exports from North America and Asia hit hardest.

https://www.wto.org/english/news_e/pres20_e/pr855_e.htm

IMF: Global economy is projected to contract sharply by -3% in 2020

The Projections assume that the pandemic fades in the second half of 2020 and containment efforts can be gradually unwound

(real GDP, annual percent change)	2019	2020	2021
World Output	2.9	-3.0	5.8
Advanced Economies	1.7	-6.1	4.5
United States	2.3	-5.9	4.7
Euro Area	1.2	-7.5	4.7
Germany	0.6	-7.0	5.2
France	1.3	-7.2	4.5
Italy	0.3	-9.1	4.8
Spain	2.0	-8.0	4.3
Japan	0.7	-5.2	3.0
United Kingdom	1.4	-6.5	4.0
Canada	1.6	-6.2	4.2
Other Advanced Economies	1.7	-4.6	4.5

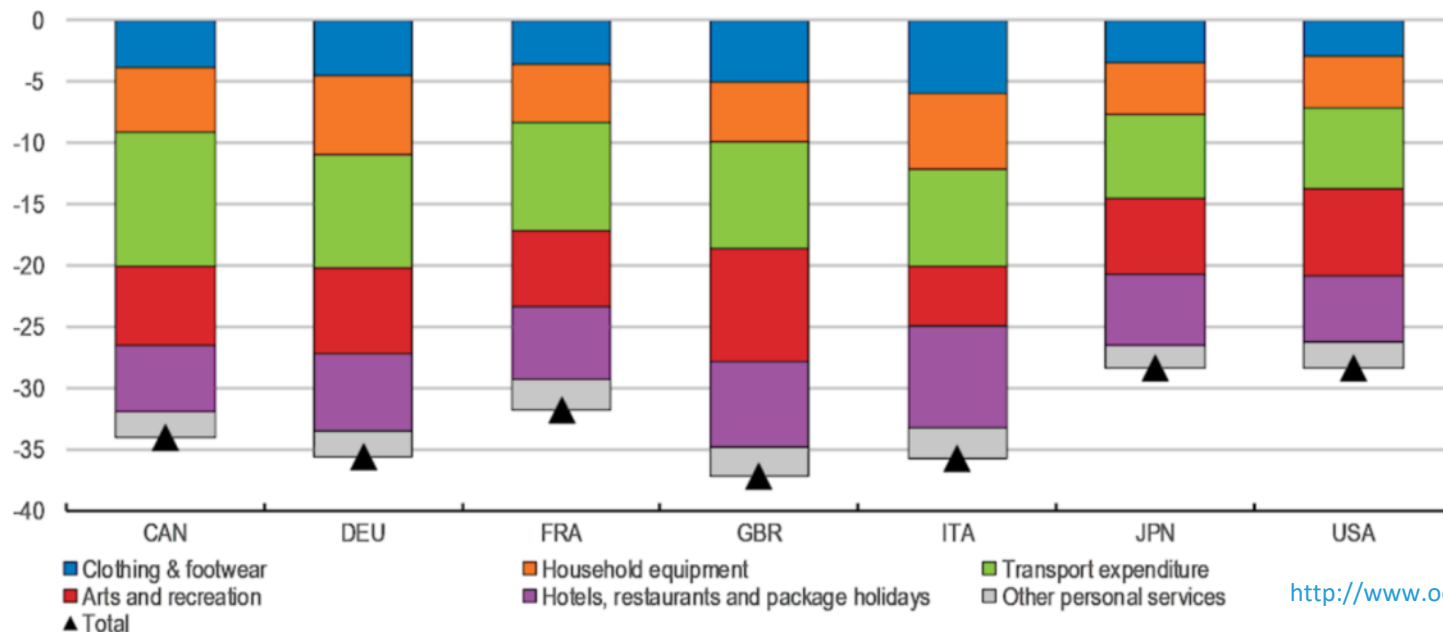
(real GDP, annual percent change)	2019	2020	2021
Emerging Markets and Developing Economies	3.7	-1.0	6.6
Emerging and Developing Asia	5.5	1.0	8.5
China	6.1	1.2	9.2
India	4.2	1.9	7.4
ASEAN-5	4.8	-0.6	7.8
Emerging and Developing Europe	2.1	-5.2	4.2
Russia	1.3	-5.5	3.5
Latin America and the Caribbean	0.1	-5.2	3.4
Brazil	1.1	-5.3	2.9
Mexico	-0.1	-6.6	3.0
Middle East and Central Asia	1.2	-2.8	4.0
Saudi Arabia	0.3	-2.3	2.9
Sub-Saharan Africa	3.1	-1.6	4.1
Nigeria	2.2	-3.4	2.4
South Africa	0.2	-5.8	4.0
Low-Income Developing Countries	5.1	0.4	5.6

<https://www.imf.org/en/Publications/WEO/Issues/2020/04/14/weo-april-2020>

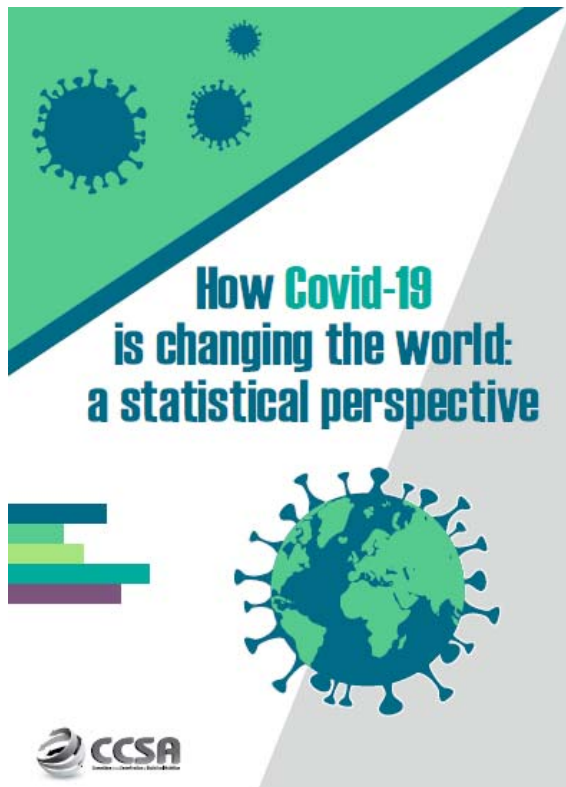
OECD: Sharp decrease in consumers' expenditures for air travel due to containment measures

The potential initial impact of partial or complete shutdowns on private consumption in the G7 economies

Per cent of total consumers' expenditure



<http://www.oecd.org/coronavirus/en/>



The new report will be published by the Committee for the Coordination of Statistical Activities (CCSA) under the auspice of the UN-DESA



Aviation industry facing deepest crisis ever in history

The aviation industry bears the weight of the consequences of the COVID-19 outbreak heavier than other industries as its "raison d'être" is the transport of people and goods all across the globe for travel, tourism, business and trade.

<https://unstats.un.org/unsd/ccsa/documents/covid19-report-ccsa.pdf>



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

<https://www.icao.int/Newsroom/Pages/Billion-fewer-international-air-travellers-this-year-according-to-latest-ICAO-forecast.aspx>

THANK YOU

<https://www.icao.int/Security/COVID-19/Pages/default.aspx>

<http://www.capsca.org/CoronaVirusRefs.html>

<https://www.icao.int/sustainability/Pages/Air-Traffic-Monitor.aspx>