

ACI WORLD UPDATE

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ACI-NA

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Important ACI World Economics and Statistics Publications

- **Annual World Airport Traffic Report**
- **ACI World Airport Traffic Forecast**
- **ACI World Economics & KPI Report**
- **ACI Policy Briefs**

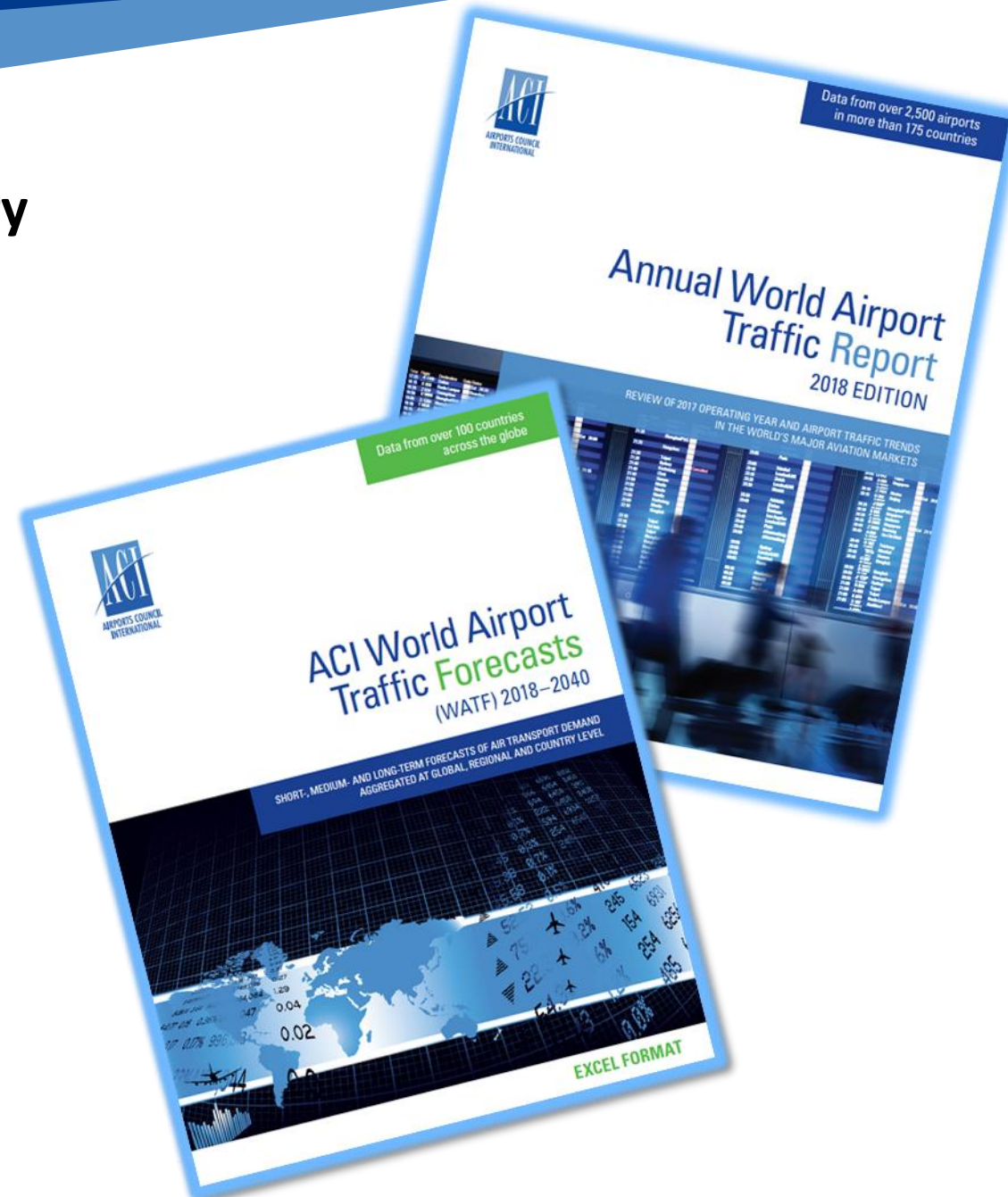
State of the airport industry

2018 preliminary results (*Global and regional*)

- Passenger traffic
- Air cargo
- Aircraft movements

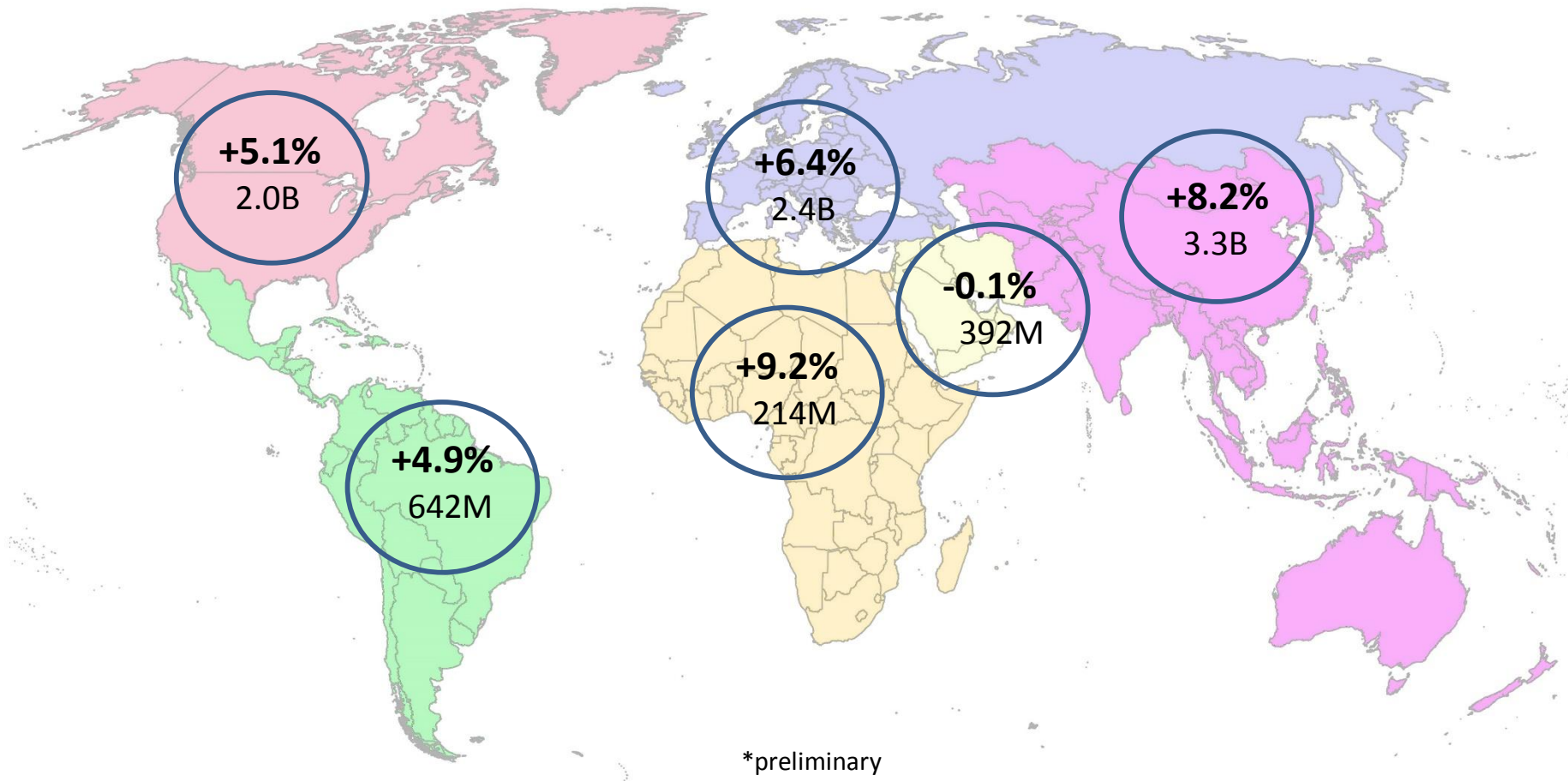
Where are we going? (*Global and regional*)

- A glimpse into the future of pax traffic



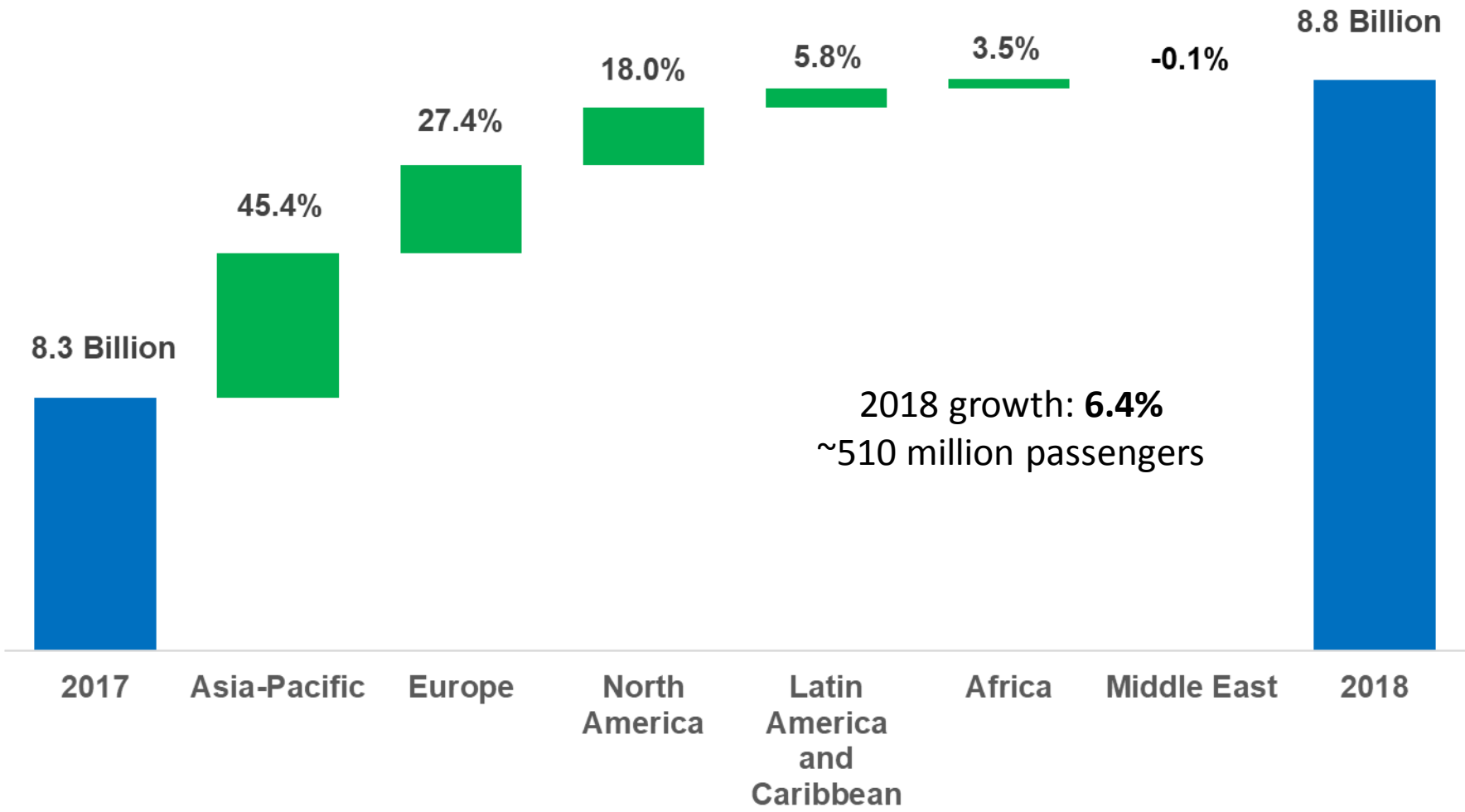
✓ **Pax: Where are we now?**

Global passenger traffic 2018*: 8.8B (+6.4%)

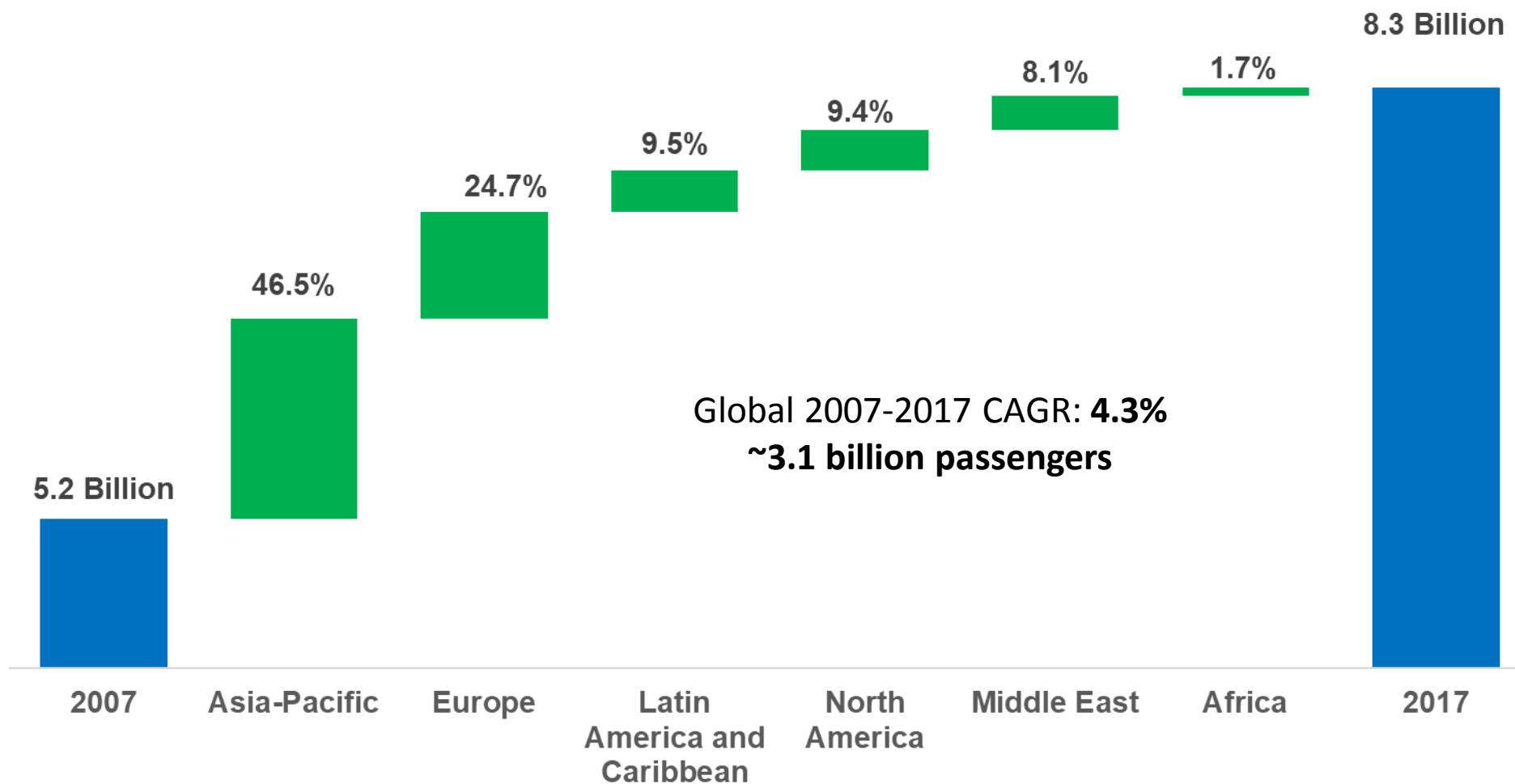


*preliminary

Regional contribution to global passenger traffic growth (2018)

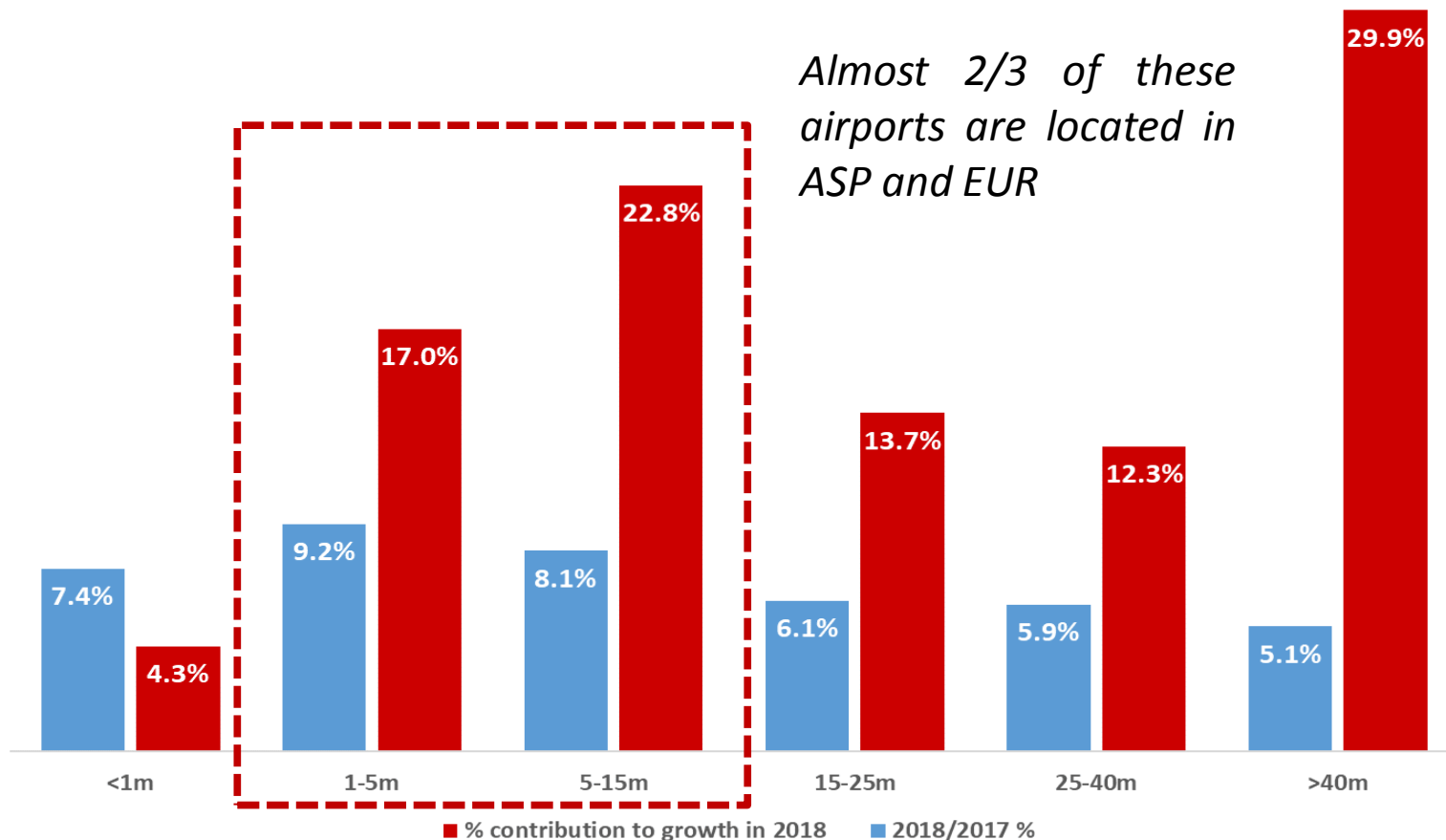


Contribution to global passenger traffic by regional share (2007-2017)



Growth in passenger traffic and share of contribution to growth by airport size (2018/2017)

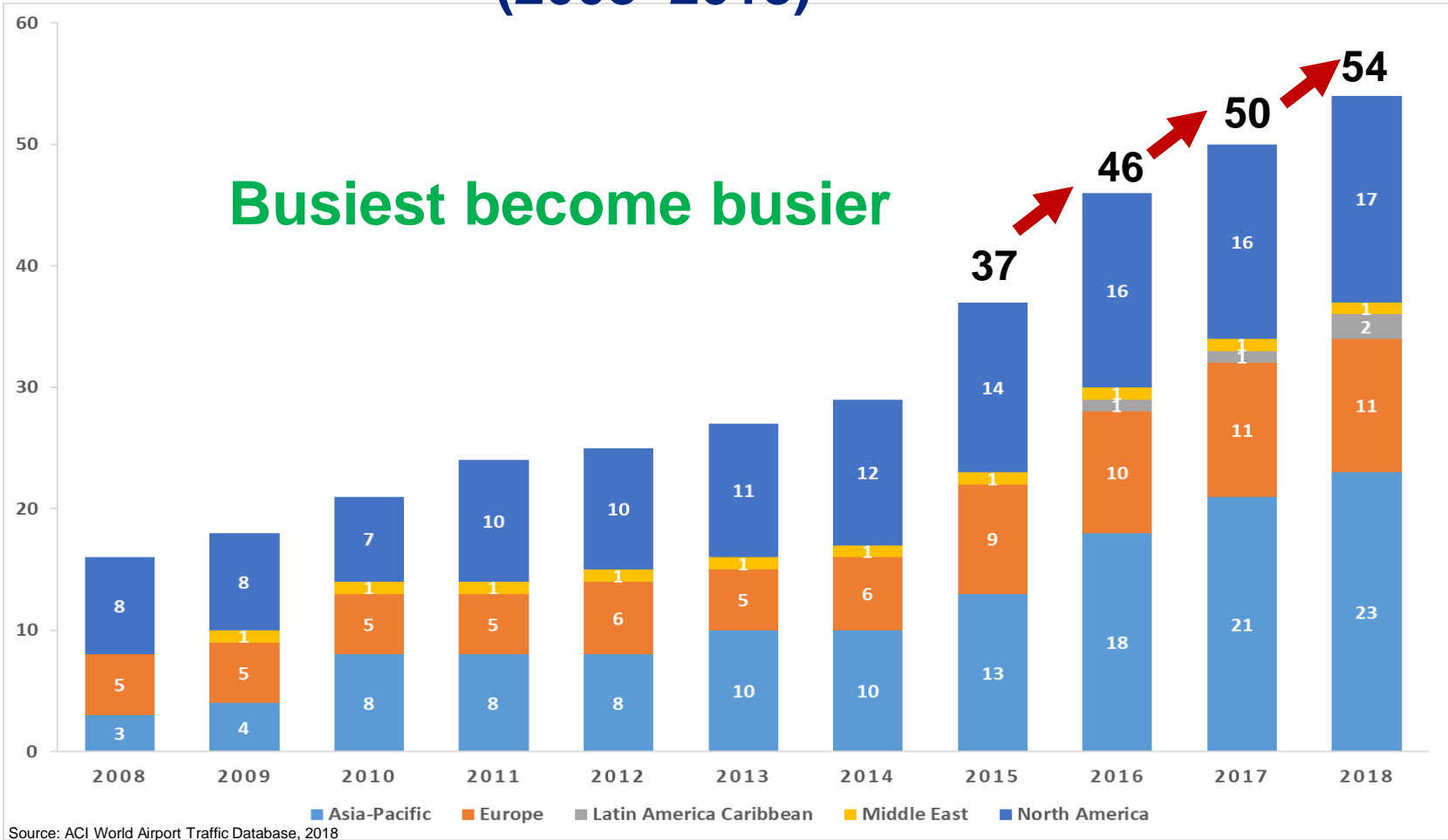
*These two categories of airports contributed **40% of the entire global traffic** increase from 2017 to 2018*



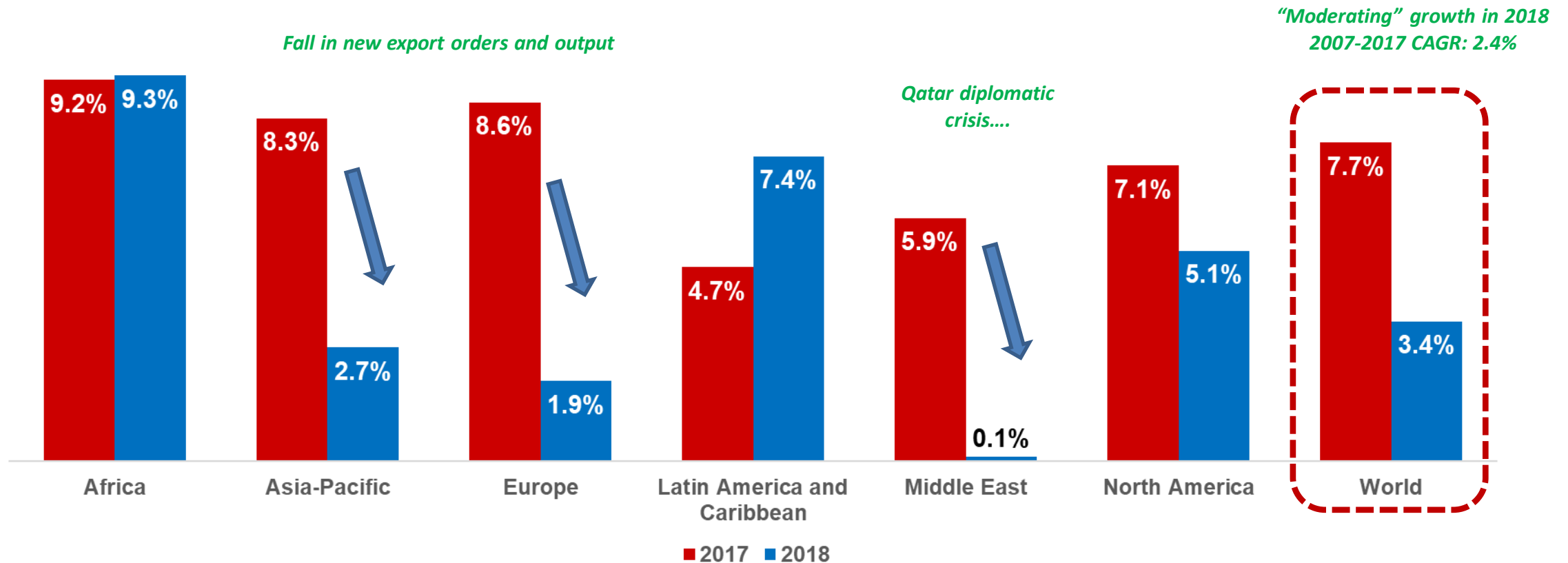
Number of airports with >40 mppa - world (2008–2018)

2018 new airports:

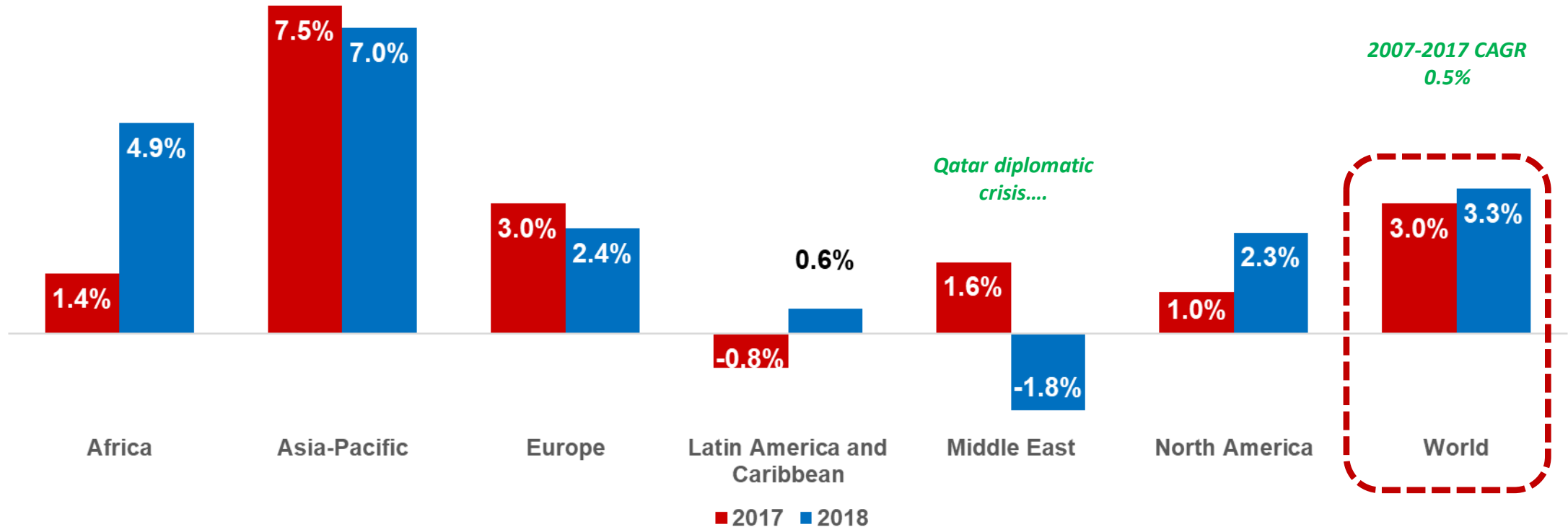
São Paulo (GRU)
Chongqing (CKG)
Boston (BOS)
Bangkok (DMK)



Air cargo growth by region 2018 versus 2017



Aircraft movement growth by region 2018 versus 2017

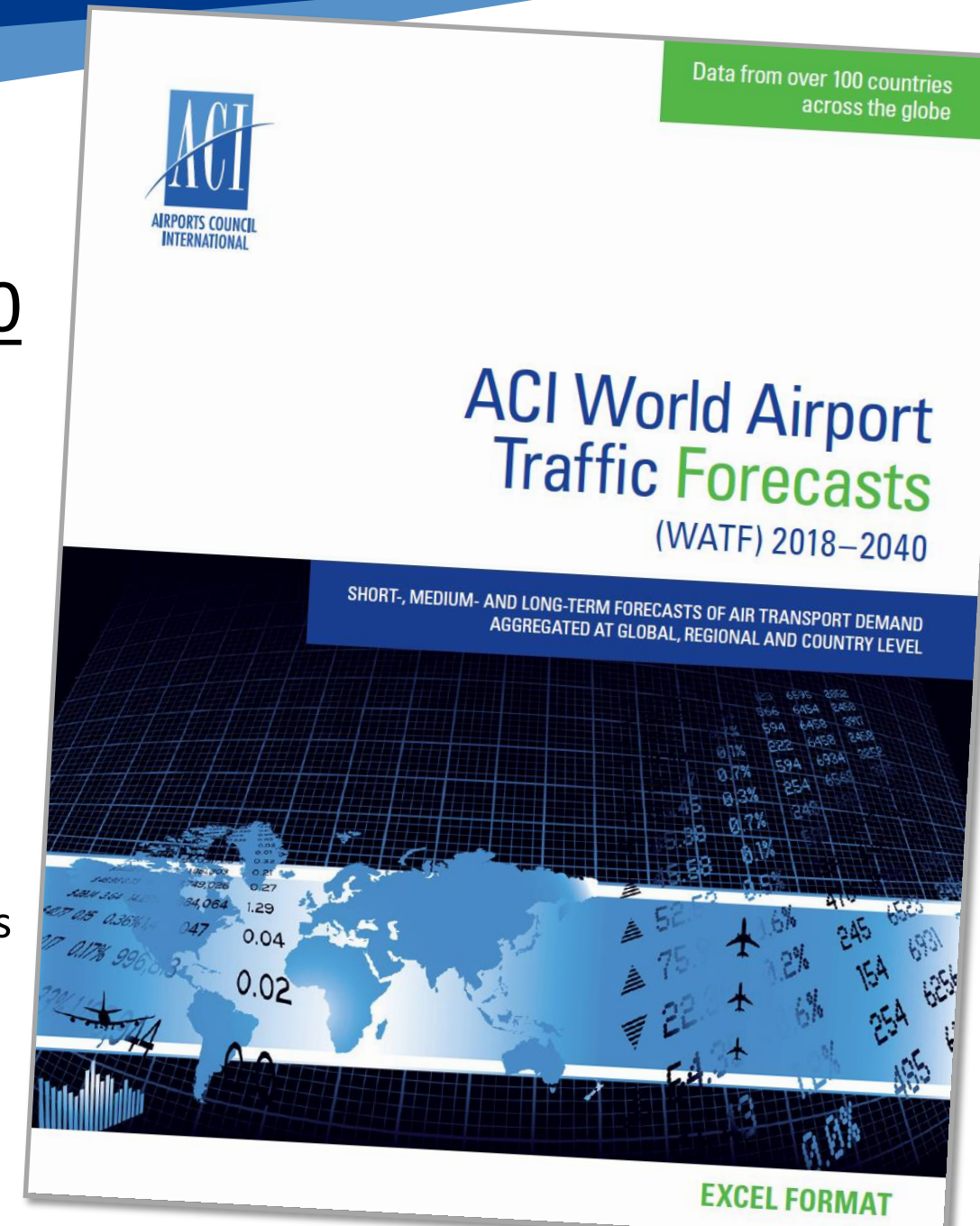


2018 traffic summary

- *Resilient industry despite political and economic turmoil;*
- *2018 preliminary growth rates; passengers (6.4%), cargo (3.4%), movements (3.3%);*
- *Largest contribution to 2018 growth from ASP (45.4%) and EUR (27.4%) ;*
- *Fastest growing airport groups by size: 1-5 m (9.2%) and 5-15 m (8.1%).*

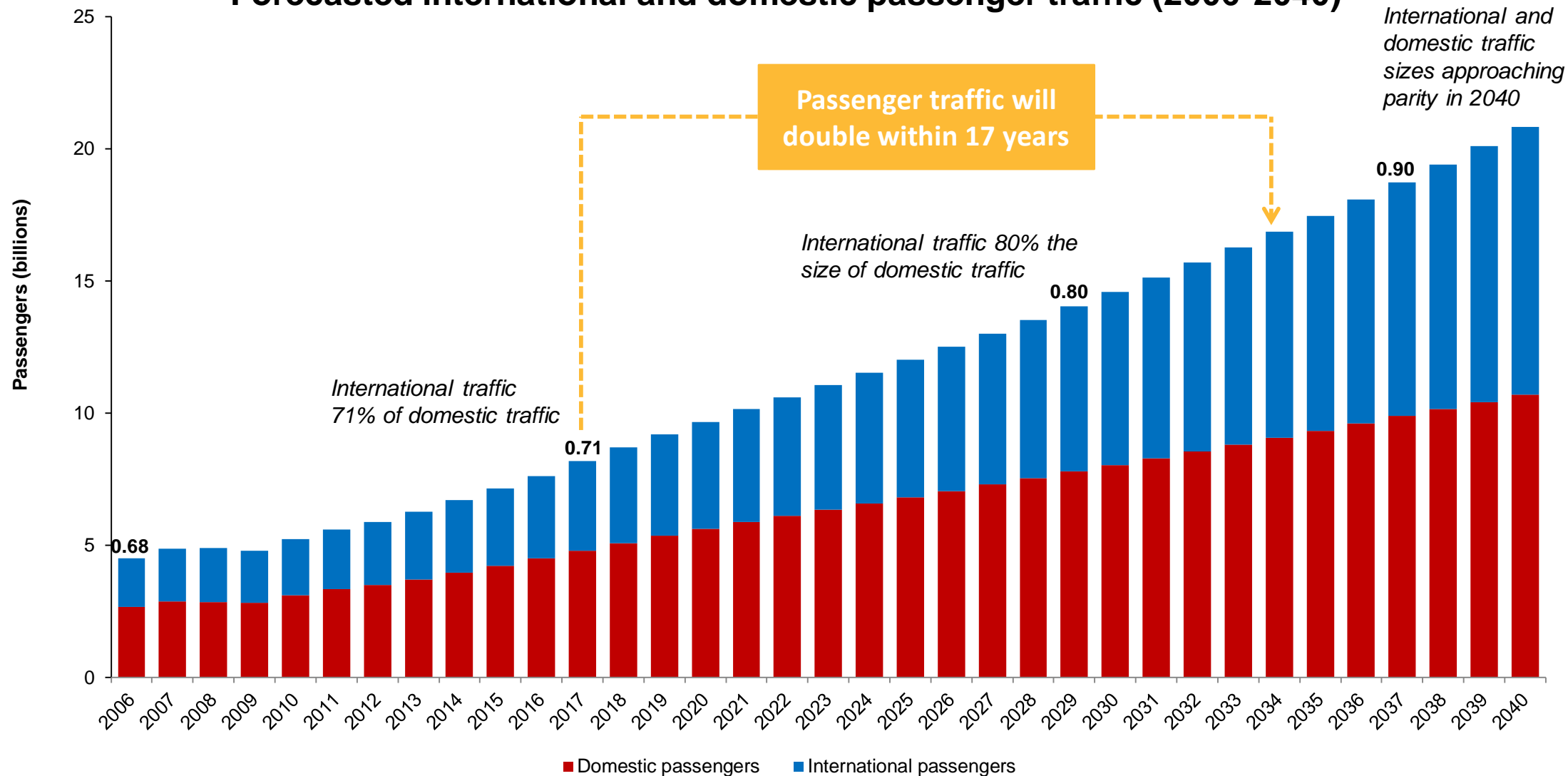
World Airport Traffic Forecasts 2018–2040

- Covers the 2018 to 2040 period, using 2017 as reference year
- Features traffic *volumes*, *growth rates*, *market shares* and *contribution to growth* for...
 - Total passengers, broken down into international and domestic
 - Total air cargo
 - Total aircraft movements
- Presented at global, regional and national levels with over 110 countries
- Includes analyses, summary tables, predicted rankings, various charts/graphs and the full dataset of forecasts



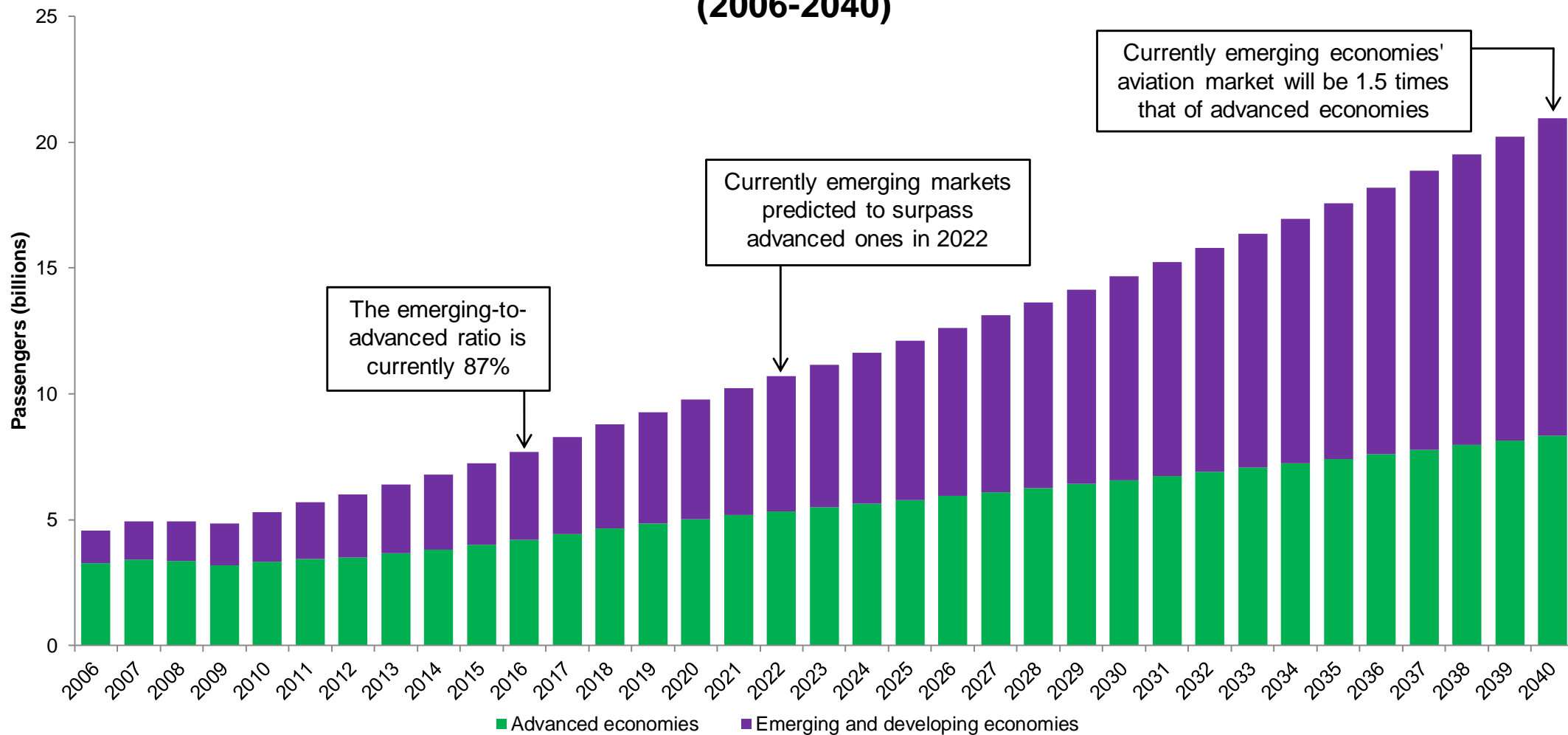
Traffic double within 17 years

Forecasted international and domestic passenger traffic (2006-2040)



The rise of emerging and developing economies

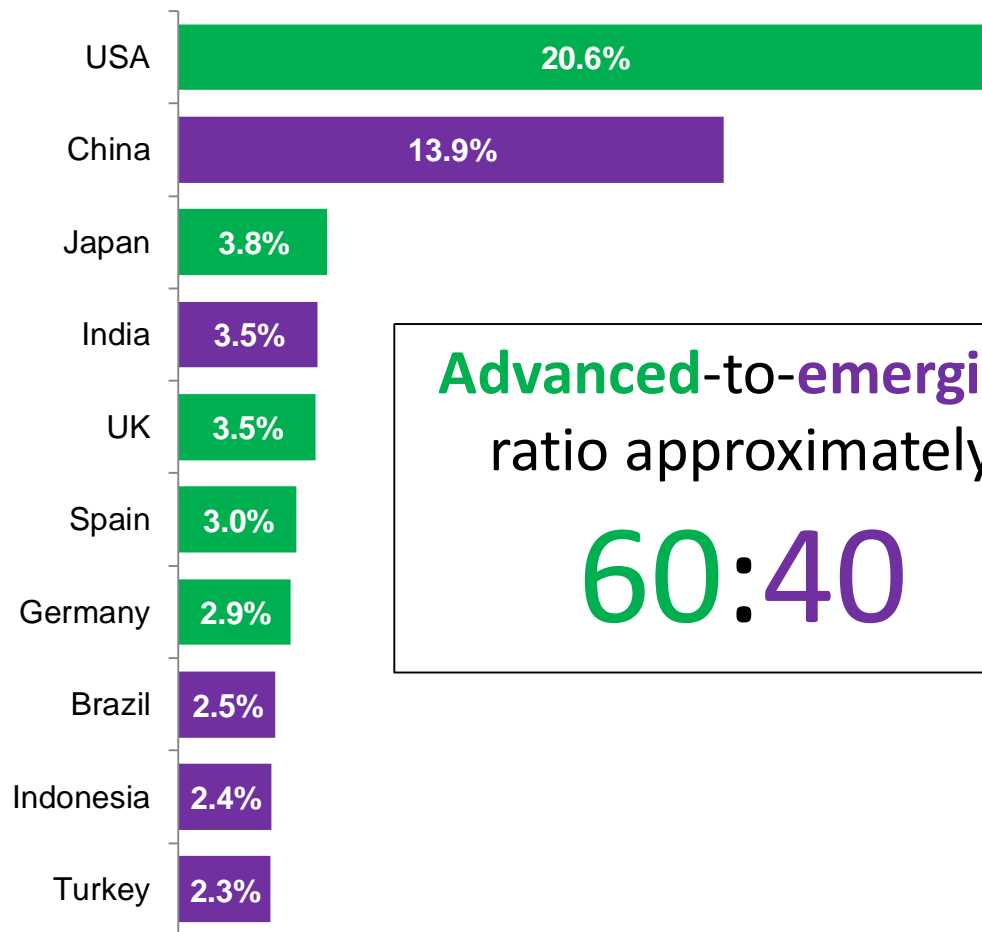
Forecasted passenger traffic—emerging versus advanced economies (2006-2040)



The rise of emerging and developing economies

Top 10 country markets by passenger traffic

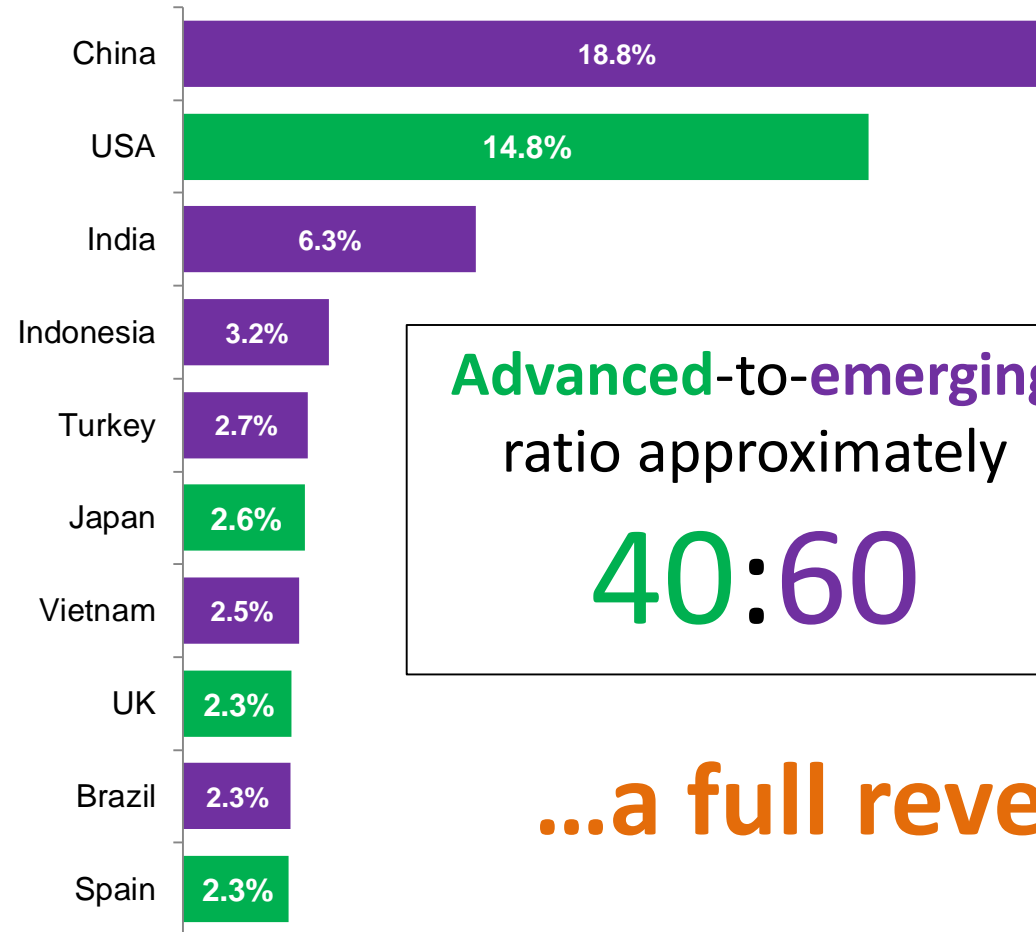
2017



Advanced-to-emerging
ratio approximately

60:40

2040



Advanced-to-emerging
ratio approximately

40:60

...a full reversal!

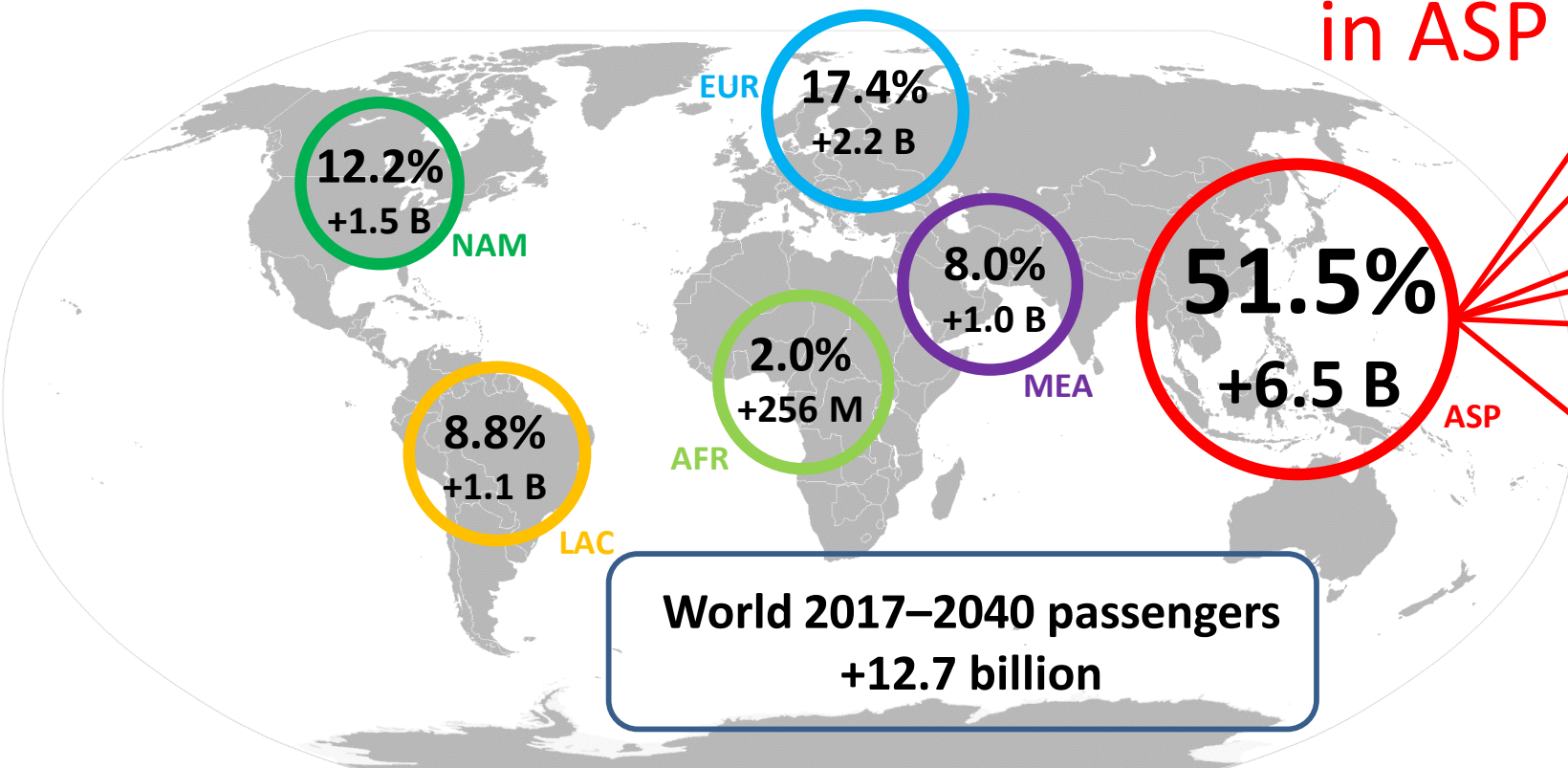
■ Advanced economies

■ Emerging and developing economies

Aviation's center of gravity moves eastward

Predicted regional contribution to passenger traffic growth 2017–2040

6/10
in ASP



TOP 10

FASTEST GROWING COUNTRIES
FOR PASSENGERS 2017–2040:
(Over 50 million passengers
per annum)

Vietnam	1	7.8%
India	2	6.8%
Saudi Arabia	3	6.2%
United Arab Emirates	4	5.7%
China	5	5.5%
Philippines	6	5.4%
Indonesia	7	5.4%
Colombia	8	5.4%
Mexico	9	5.4%
Malaysia	10	4.8%

All are emerging and
developing economies **16**

WATF 2018–2040 Summary

- *Aviation is shifting eastward;*
- *Passenger traffic doubles in 17 years;*
- *Majority of traffic in currently emerging economies by 2022;*
- *ASP major contributor to forecasted global growth.*

Airport economics and industry highlights (FY 2017)



**GLOBAL
INDUSTRY
REVENUES** **\$172.2** billion ^{*in US\$}



Airport Economics 2019 REPORT

A COMPREHENSIVE VIEW OF THE INDUSTRY'S
FINANCIAL PERFORMANCE



- **Airport Economics Report (AER)**
- **Airport Economics Key Performance Indicators (KPIs)**

Representing airport interests

ACI Economic policy oriented publications (data driven and evidence based to support policy makers):

- ACI Policy Brief on airport ownership, regulation and financial performance (March 2017)
- ACI Policy Brief on airport networks and the sustainability of small airports (Fall 2017)
- ACI Policy Brief creating fertile grounds for private investment in airports (June 2018)



Representing airport interests

Recent guidance material:

- Recommended practices on Transparency and consultations with airlines on setting airport charges

RECOMMENDED PRACTICES ON TRANSPARENCY AND CONSULTATIONS WITH AIRLINES ON SETTING AIRPORT CHARGES



Airports have become businesses in their own right. In an increasingly competitive environment which drives airports to sophisticate their services to the airlines and their end-users, the passengers, it is essential to build the right trust between airports and airlines, by ensuring the right level of transparency and that consultations are carried out in setting charges and capital planning in a structured and meaningful way.

Adequate airport infrastructure is a core enabler of air connectivity, passenger service quality and social and economic growth. As per the "user pays principle" this needs to be paid for via airport charges. It is therefore essential that airport charges properly reflect market

realities and deliver on the longer-term needs of the ultimate end-users. Any regulatory framework must facilitate and incentivise airport investors to continue to finance airport investments.

This document is meant to provide recommendations on the process for consultation between airports and airlines. Transparency, as it relates to consultation, is also addressed. However, this guide should not be used as limitation or constraint for airport operators and/or States to apply their own methodologies when circumstances, regulation, or other factors recommend it.

ACI World Economics and Statistics

<https://store.aci.aero/product-category/economics-statistics/>