



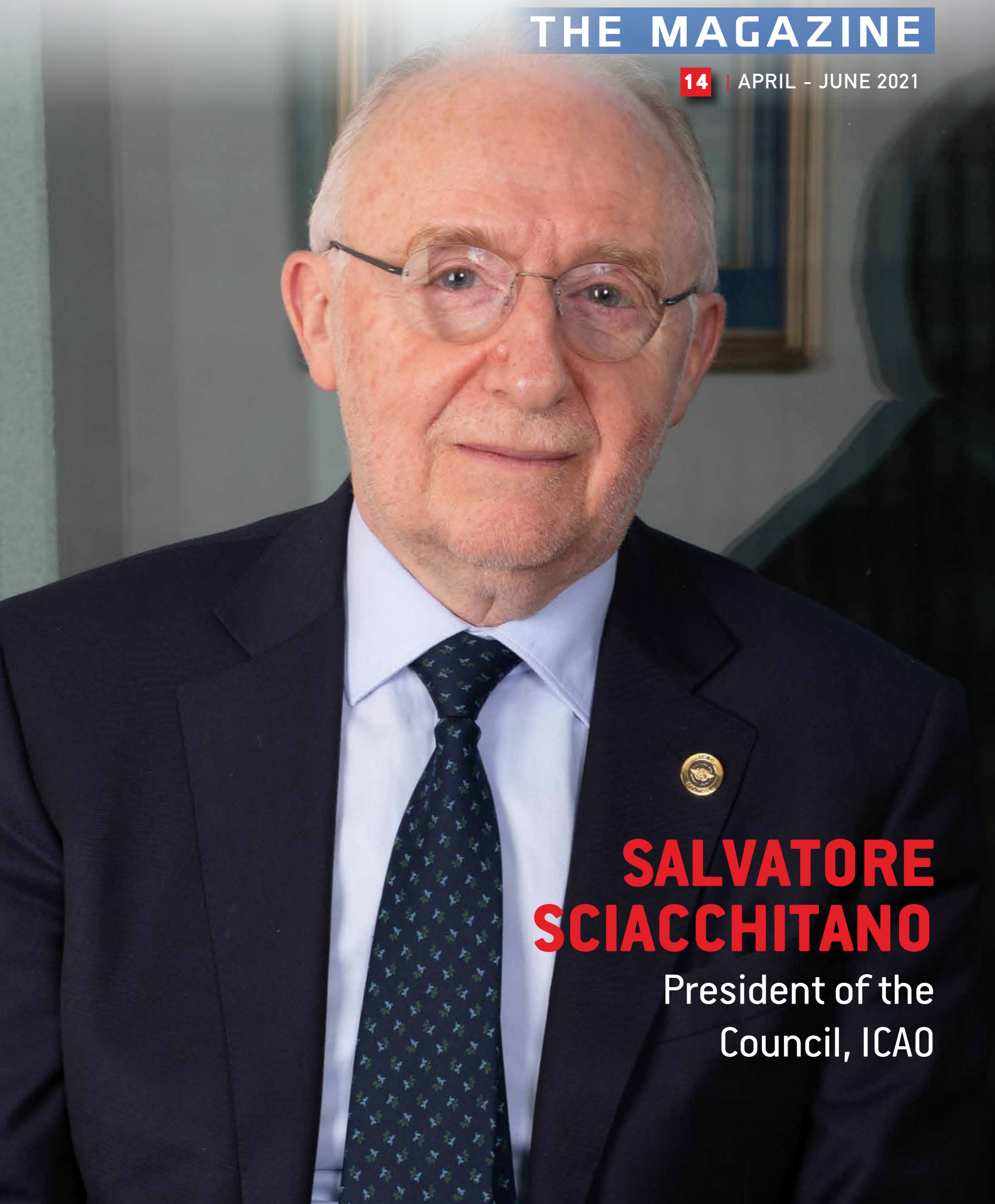
# HERMES

AIR TRANSPORT ORGANISATION

THE MAGAZINE

14

| APRIL - JUNE 2021



**SALVATORE  
SCIACCHITANO**

President of the  
Council, ICAO



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**Dr Kostas Iatrou**  
Director General,  
Hermes - Air Transport Organisation



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**April - June 2021**  
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# EDITORIAL



**Dr Kostas Iatrou**

Director General

Hermes - Air Transport Organisation

Dear Hermes member,

I am pleased to welcome you to our latest issue of The Magazine. After organising two events in Latin America and in Europe, Hermes in partnership with iPADIS organised on July 1st the last for this year virtual event focusing on the African region.

Hermes, despite the challenges the industry has been facing over the last 18 months, organised the 2021 Hermes AGM & Leaders Forum one of the first events with the physical presence of the participants.

During the event Hermes signed two MoUs, one with Airlines for America and one with the University of the Aegean.

Hermes also presented the recommendations for the 2021 in "Resilience and Efficiency Through Leadership and Cooperation"

Finally we have the pleasure to host an interview with Salvatore Sciacchitano, President of ICAO Council.

Enjoy reading,

*Kostas Iatrou*



01/04/2021

## WALSH TAKES THE HELM AT IATA

The International Air Transport Association (IATA) announced that Willie Walsh has officially taken on the role of Director General of the organization. He succeeds Alexandre de Juniac.

*"I am passionate about our industry and about the critical work that IATA does on behalf of its members, never more so than during the COVID-19 crisis. IATA has been at the forefront of efforts to restart global connectivity, including developing the IATA Travel Pass. Less visible but of equal importance, airlines continue to rely on IATA's financial settlement systems, Timatic and other vital services to support their day-to-day operations. I am grateful to Alexandre for leaving behind a strong organization and a motivated team. Together, the IATA team is absolutely focused on restoring the freedom of movement that airlines provide to billions of people around the world. That means your freedom to visit friends and family, to meet critical business partners, to secure and retain vital contracts, and to explore our wonderful planet"* said Walsh.

Source: IATA



01/04/2021

## FAA AWARDS \$627.7 MILLION IN AIRPORT IMPROVEMENT GRANTS

The U.S. Department of Transportation's Federal Aviation Administration (FAA) will award more than \$627.7 million in infrastructure and safety projects through the FY2021 Airport Improvement Program (AIP).

AIP projects promote safety, efficiency, environmental stewardship, infrastructure, and security at the nation's airports. Today's grant announcement includes 449 grants to 390 airports in 39 states, Puerto Rico and the Federated States of Micronesia.

05/04/2021

## AADVANTAGE CELEBRATES 40 YEARS OF LOYALTY INNOVATION

When American Airlines launched the AAdvantage® loyalty program in 1981, it was one of the airline industry's first frequent flyer programs to reward members for their travel. Forty years later, AAdvantage continues to lead the way with innovative new partnerships, providing members with more personalized choices in a program that's never been easier for members to use.

American Airlines  
**AAdvantage**

09/04/2021

## JOINT STATEMENT ON TRANSPORT COOPERATION BY THE DEPARTMENT OF TRANSPORTATION OF THE UNITED STATES OF AMERICA AND THE MINISTRY OF TRANSPORT OF SINGAPORE

Secretary of Transportation of the United States of America, Pete Buttigieg and Minister for Transport of the Republic of Singapore, Ong Ye Kung, held an introductory virtual meeting on April 8, 2021.

Secretary Buttigieg and Minister Ong both recognize the impact of transportation on climate change, as well as the critical role that transport plays in driving post-COVID-19 economic recovery, keeping goods and supply chains moving, facilitating people-to-people exchanges, and contributing to overall economic development.

Building on the excellent co-operation established over the years by the technical agencies and officials on both sides, they intend to strengthen and deepen bilateral exchanges between Singapore and the United States across all transport sectors, including:

- a. Exploring ways to revive international air travel safely amid the ongoing COVID-19 pandemic, and long-term post-pandemic recovery and resiliency, including discussions related to international use and interoperability of vaccination certificates, whether digital or otherwise;
- b. Continuing to co-operate on enhancing safety, security, and facilitation;
- c. Exchanging best practices on urban transport and intelligent transport systems; and
- d. Exploring opportunities to advance digitalization and to harness the potential of automation, including through well-designed regulation.

14/04/2021

## STATEMENT OF THE WISE PERSON GROUP ON THE FUTURE OF SINGLE EUROPEAN SKY

The Wise Persons Group therefore calls on the European institutions, Member States, all ATM stakeholders and the staff engaged in this process to:

Support the measures aimed towards the improvement of the provisions applicable today. In our view, the WPG report recommendations remain to provide a good high-level framework for what needs to be achieved to make the European ATM better.

- Constructively engage in the negotiations on SES2+ recast proposal fully noting the emphasis on sovereignty, security, defence and safety arguments as they are in the core of our aviation system, and will always be ensured whichever policy action is taken.
- Support effective social dialogue towards the Digital European Sky and make sure that training and licensing rules become adequate.
- Work together as a team Europe in order to ensure that European ATM network becomes more efficient, green and fit for the future. This will enable a sustainable and swift recovery of the whole aviation sector, and it will fulfil our obligations towards the traveling public.



14/04/2021

## ICAO NACC REGION UPDATED ON LATEST PANDEMIC PRIORITIES

At a virtual meeting with the region's aviation leaders, ICAO Secretary General Dr. Fang Liu joined the agency's North American, Central American, and Caribbean (NACC) Regional Director, Mr. Melvin Cintron, in highlighting how NACC States could become an example on how to optimize air travel and tourism in aid of wider regional recovery and growth objectives through enhanced coordination.

"While public health is, and must remain, the overriding priority for civil societies, the critical role played by air transport in crisis response and general economic recovery must not be under-estimated," she noted. "ICAO and its Member States clearly recognize that the COVID-19 pandemic is not only a health crisis – it is also an economic and financial crisis presenting governments with very difficult trade-offs in terms of the medical, economic, and social priorities concerned."



19/04/2021

## ICAO COUNCIL PRESIDENT HIGHLIGHTS CHALLENGES AND PATH FORWARD FOR POST-PANDEMIC AVIATION

ICAO Council President Salvatore Sciacchitano told Latin American civil aviation leaders today that the sector should expect to encounter a range of challenges as air travel begins its return to normal.

The President's comments were part of the Keynote remarks he provided to the Hermes Air Transport event on 'Resilience and efficiency through Leadership and Cooperation' in the post-COVID era for Latin American aviation.

"We are back to 2003 levels in terms of global seat capacity," President Sciacchitano commented, explaining that ICAO is projecting an overall global reduction in passengers of between forty-one and fifty percent for 2021, compared to the sixty per cent reduction it monitored for 2020.

"The significant downturns being withstood in global and regional air travel continue to present severe liquidity strains to companies and suppliers," he emphasized, "and across the full extent of the air transport and tourism value chains."



ICAO

20/04/2021

## ICAO CELEBRATES LATEST STEP IN AVIATION INNOVATION WITH CODE ASSIGNMENTS FOR WORLD-FIRST OFF-PLANET FLIGHT OPERATION

In support of its Organization-wide focus on innovation in aviation, ICAO presented NASA and the FAA with official ICAO flight designator and call-sign codes for the 'Ingenuity' helicopter flight conducted on Mars. The flight was operated using the 'IGY' three-letter designator, and call-sign 'INGENUITY', which has

been assigned to NASA in the ICAO's Designators for Aircraft Operating Agencies, Aeronautical Authorities and Services.

The location of the flight was ceremonially assigned ICAO location designator 'JZRO' for the Jezero Crater where the Mars operation took place.



Source: An illustration of NASA's Ingenuity Helicopter flying on Mars. Credits: NASA/JPL-Caltech.

21/04/2021

## ALASKA AIRLINES COMMITS TO CARBON, WASTE AND WATER GOALS FOR 2025, ANNOUNCES PATH TO NET ZERO BY 2040

Alaska Airlines today announced its commitment and roadmap to reduce the company's carbon emissions to net-zero by 2040, and commitments across carbon, waste, and water impacts by 2025. Today's announcement included the release of Alaska's 2020 LIFT Sustainability Report detailing the company's broader climate change strategy, including waste and water initiatives.

Alaska, together with its regional subsidiary Horizon Air, identified the reduction of greenhouse gas emissions as the company's most important opportunity for environmental action.





22/04/2021

**IATA WELCOMES WHO EMERGENCY COMMITTEE RISK MANAGEMENT RECOMMENDATIONS**

The International Air Transport Association (IATA) urged states to comply with recommendations on international travel from the World Health Organization's International Health Regulations (2005) Emergency Committee on testing and risk management during the COVID-19 pandemic. In particular, IATA highlighted the following recommendations for states:

*"Do not require proof of vaccination as a condition of entry."* IATA believes that the freedom to travel across borders should not be limited to those who are able to be vaccinated. It does, however, support governments opening borders to those who have been vaccinated and that testing should also play a key role where vaccination is not possible. Together—testing and vaccination—are key measures for states to safely reopen their borders and restore freedom of movement while managing the public health risks of COVID-19.

*"Implement coordinated, time-limited, risk-based, and evidence-based approaches for health measures in relation to international*



*traffic"* IATA strongly supports risk-based measures to safely manage international travel. Most scientists believe that COVID-19 will become endemic and that society will need to learn to live with the virus. The air transport industry manages multiple risks—technical, natural, geopolitical, etc.—to maintain safe operations. In line with this recommendation, IATA continues to call on governments to work with the industry to establish plans to safely reconnect their people and economies via air transport based on clear benchmarks for reopening and testing/vaccination protocols to manage risks.

*"Reduce the financial burden on international travelers for the measures such as testing, isolation/quarantine, and vaccination, in accordance with Article 40 of the International Health Regulations."* IATA firmly believes that government-mandated public

health measures to manage the risks of COVID-19 should not be a financial barrier to travel.

States agreed that the cost of mandatory measures such as testing should be borne by the government in Article 40 of the International Health Regulations. This should not be forgotten in a pandemic. With the cost of PCR testing at US\$100 at the low-end and the requirement for multiple tests for a single journey, this could easily make flying unaffordable for individuals and families – reversing decades of progress to make the freedom to travel more accessible.

The same applies to quarantine measures where mandated by governments.

*"Prioritize vaccination for seafarers and air crews."* IATA strongly supports the recommendation to prioritize air crew for vaccination. It will protect crew and underpin efficient operations. This is critically important during the crisis for global supply chains transporting vaccines, medicines and medical equipment required to combat the virus.

22/04/2021

**ACI WORLD DATA REVEALS COVID-19'S IMPACT ON WORLD'S BUSIEST AIRPORTS**

Airports Council International (ACI) World has today published its preliminary world airport traffic rankings – covering passenger traffic, cargo volumes, and aircraft movements for 2020 – showing the dramatic impact of COVID-19 on what are ordinarily the world's busiest airports.

Global passenger traffic at the world's top 10 busiest airports decreased by -45.7% in 2020. Overall, passenger traffic at the world's airports decreased by -64.6% which shows that the impact of the pandemic and the early stages of recovery in air travel has not been uniform around the world.

According to the preliminary data published today, Guangzhou Bai Yun International Airport in China recorded the most passenger traffic in 2020, with Atlanta Hartsfield-Jackson International Airport in the United States just behind.

►cont'd

22/04/2021

## ACI WORLD DATA REVEALS COVID-19'S IMPACT ON WORLD'S BUSIEST AIRPORTS ►cont'd

Seven of the top 10 airports for passenger traffic are in China with three in the United States. In most cases, domestic air travel is beginning a modest rebound while international air travel remains depressed because of on-going travel restrictions. For example, Hongqiao International Airport in China has moved from 46th position in 2019 to the 9th in 2020, illustrating the uneven nature of the impact of, and recovery from, the pandemic across the world.

PASSENGERS*					
2020	2019	AIRPORT	2020	2019	Percent change
1	11	GUANGZHOU, CN (CAN)	43 767 558	73 394 810	-40.4
2	1	ATLANTA GA, US (ATL)	42 918 685	110 531 300	-61.2
3	24	CHENGDU, CN (CTU)	40 741 509	55 858 552	-27.1
4	10	DALLAS/FORT WORTH TX, US (DFW)	39 364 990	75 066 956	-47.6
5	26	SHENZHEN, CN (SZX)	37 916 054	52 931 925	-28.4
6	48	CHONGQING, CN (CKG)	34 937 789	44 786 722	-22.0
7	2	BEIJING, CN (PEK)	34 513 827	100 013 642	-65.5
8	16	DENVER CO, US (DEN)	33 741 129	69 015 703	-51.1
9	37	KUNMING, CN (KMG)	32 990 805	48 076 238	-31.4
10	46	SHANGHAI, CN (SHA)	31 165 641	45 637 882	-31.7

22/04/2021

## AFRAA AND ACI AFRICA SIGN MOU FOR MUTUAL SUPPORT TO THE AIR TRANSPORT INDUSTRY IN AFRICA

The African Airline Association (AFRAA) and Airports Council International Africa (ACI Africa) have signed a memorandum of understanding (MoU) to materialise their cooperation. Under the framework of the MoU, AFRAA and ACI Africa will mutually support the development of the air transport industry in Africa through collaborative actions to address safe, secure, seamless, environmentally-friendly and affordable air travel, among others.

The MoU was signed by Abderahmane Berthé, AFRAA's Secretary General and Mr Ali Tounsi, ACI Africa's Secretary General. Under the MoU, AFRAA and ACI Africa will align their actions and work jointly on the following main areas:

- Promotion and sharing of best practices to foster constructive engagement between airport operators and air carriers.

- Safety enhancement initiatives in line with the Abuja Safety targets.
- Promotion and implementation of new technologies in air travel.
- Data and intelligence sharing.
- Affordable airfares in Africa using a holistic approach for the reduction of the cost of air travel.
- Focused Think Tank group, led by AFRAA and

ACI Africa and comprising subject-matter experts in airports and airlines, to exchange views, steer constructive dialogues and address matters of prime importance and interest for the air transport industry on Africa.

- Joint events (webinars, trainings, workshops, etc.) on how to render air travel more affordable in Africa.



22/04/2021

### INTERNATIONAL AIRLINES GROUP (IAG) HAS BECOME THE FIRST EUROPEAN AIRLINE GROUP TO COMMIT TO POWERING 10 PER CENT OF ITS FLIGHTS WITH SUSTAINABLE AVIATION FUEL BY 2030

The Group will purchase one million tonnes of sustainable jet fuel per year enabling it to cut its annual emissions by two million tonnes by 2030. This equates to removing one million cars from Europe's roads each year.

In addition, IAG will become the first airline group worldwide to extend its net zero commitment to its supply chain. The Group will be working with its suppliers to enable them to commit to achieving net zero emissions by 2050 for the products and services they provide to IAG.

23/04/2021

### UNWTO AND IATA COLLABORATE ON DESTINATION TRACKER TO RESTORE CONFIDENCE IN TRAVEL

The World Tourism Organization (UNWTO) and the International Air Transport Association (IATA) announce a Destination Tracker in preparation for the restart of international travel. It is the result of both organizations joining efforts to boost confidence and accelerate recovery of the tourism sector when borders reopen. The UNWTO-IATA Destination Tracker is a new free online tool for governments to provide information on COVID-19 requirements for travel and the measures in place at the destination.

The tool is available through the websites of both organizations and will provide information on:

- COVID-19 Indicators including infection rates, positivity rates, and vaccination roll out by destination/country.
- Air Travel Regulations, including test and quarantine requirements, provided by IATA's Timatic solution.
- Destination Measures, including general health and safety requirements such as use of masks, transit through a country, curfew, or regulations related to restaurants and attractions, provided by national tourism organizations.

26/04/2021

### EUROCONTROL AND THE EUROPEAN DEFENCE AGENCY SIGN JOINT WORK PROGRAMME 2021-22

EUROCONTROL and the European Defence Agency (EDA) have today signed an agreement updating their complementary activities in support of

the military in the context of the Single European Sky (SES) and SESAR.



**26/04/2021****EASA APPROVES THE FIRST VIRTUAL REALITY (VR) BASED FLIGHT SIMULATION TRAINING DEVICE**

The European Union Aviation Safety Agency (EASA) has granted the first certificate for a Virtual Reality (VR) based Flight Simulation Training Device (FSTD).

The device, for rotorcraft pilots, enhances safety by opening up the possibility of practising risky manoeuvres in a virtual environment. This addresses a key risk area in rotorcraft operations, where statistics show that around 20% of accidents occur during training flights. The device was developed and built by VRM Switzerland (VRMotion Ltd.).

**28/04/2021****ANA TO INSTALL WORLD'S FIRST HANDS-FREE LAVATORY DOORS ON 21 AIRCRAFTS**

All Nippon Airways (ANA) has partnered with JAMCO Corporation to develop the world's first hands-free door that allows easy access to lavatories on its aircraft. The innovative door was developed as part of the ANA Care Promise initiative, and will help limit potential vectors for the transmission of pathogens. The first hands-free doors will be introduced to domestic flights starting May 1.



Source: ANA

**29/04/2021****EU COVID-19 CERTIFICATE MUST FACILITATE FREE MOVEMENT WITHOUT DISCRIMINATION**

On Thursday, Parliament adopted its negotiating position on the proposal for a certificate to reaffirm the right to free movement in Europe during the pandemic. MEPs agreed that the new "EU COVID-19 certificate" - instead of Digital Green Certificate, as proposed by the Commission - should be in place for 12 months and not longer.

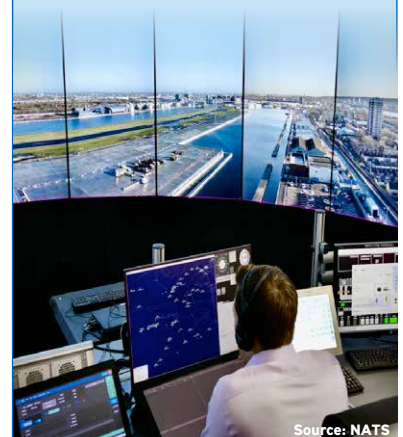
The document, which may be in digital or paper format, will attest that a person has been vaccinated against coronavirus or, alternatively, that they have a recent negative test result or have recovered from the infection. However, EU COVID-19 certificates will neither serve as travel document nor become a precondition to exercise the right to free movement, say MEPs.

**29/04/2021****AVIATION, TRAVEL & TOURISM APPLAUD EU PARLIAMENT VOTE ON "EU COVID-19 CERTIFICATES"**

Europe's aviation, travel and tourism sectors fully welcome yesterday's vote in the European Parliament on the EU's proposed Digital Green Certificate Regulation, setting trilogue negotiations between the Parliament, the Council and the European Commission into motion. Swift action and alignment among the institutions is now critical in order to make the certificates operational by June and ensure reciprocity with non-EU systems. Common, interoperable, secure and GDPR-compliant health certificates represent an essential tool to facilitate the free movement of people within the EU and reopen travel in a safe and responsible way through the easing, and ultimately lifting of current travel restrictions.

**30/04/2021****LONDON CITY IS FIRST MAJOR AIRPORT CONTROLLED BY REMOTE DIGITAL TOWER**

London City Airport has become the first major international airport in the world to be fully controlled by a remote digital air traffic control tower, following intensive testing and live trials of the revolutionary technology during lockdown.



Source: NATS



03/05/2021

## EUROPEAN COMMISSION PROPOSES TO EASE RESTRICTIONS ON NON-ESSENTIAL TRAVEL TO THE EU WHILE ADDRESSING VARIANTS THROUGH NEW 'EMERGENCY BRAKE' MECHANISM

The Commission proposes to allow entry to the EU for non-essential reasons not only for all persons coming from countries with a good epidemiological situation but also all people who have received the last recommended dose of an EU-authorized vaccine. This could be extended to vaccines having completed the WHO emergency use listing process.

In addition, the Commission proposes to raise, in line with the evolution of the epidemiological situation in the EU, the threshold related to the number of new COVID-19 cases used to determine a list of countries from which all travel should be permitted. This should allow the Council to expand this list.

03/05/2021

## LUFTHANSA GROUP PUSHES AHEAD WITH FLEET MODERNIZATION AND PURCHASES 10 HIGHLY EFFICIENT LONG-HAUL AIRCRAFT

Lufthansa Group is accelerating the modernization of its fleet. New, highly cost and fuel-efficient aircraft are replacing older types on short, medium and long-haul routes. As a result, the Executive Board of Deutsche Lufthansa AG decided to buy ten long-haul aircraft: five Airbus A350-900s and five Boeing B787-9. The Supervisory Board approved the purchase today. These aircraft will be operated by Lufthansa Airline and strengthen the 5-star premium offer of the Group's core brand.

06/05/2021

## INTEGRATING SPACE-BASED ADS-B INTO EUROCONTROL'S NETWORK OPERATIONS SYSTEM BRINGS MAJOR PREDICTABILITY GAINS AND WILL UNLOCK FUTURE CAPACITY

In a major operational enhancement of the EUROCONTROL Network Manager's (NM) operational systems, real-time air traffic surveillance data derived from Aireon's space-based ADS-B system has now been integrated into NM's Enhanced Traffic Flow Management System (ETFMS). The new data will significantly boost air traffic predictability by up to 20%, improving operational efficiency and resilience while unlocking capacity for the future that will help reduce environmental impacts.

The new high-fidelity data, refreshed every 60 seconds, will cover not only air traffic across all 41 EUROCONTROL Member States as well as Israel and Morocco, EUROCONTROL's two Comprehensive Assessment States, but also peripheral zones stretching as far as the Middle East and North America. After processing the data, EUROCONTROL will work with air navigation service providers, airports and airlines to use the data to optimise flow management, which will play its part in improving the punctuality of arrivals and departures at European airports, benefitting passengers, staff and the environment.



Source: EUROCONTROL

11/05/2021

**ACI WORLD SHOWS ECONOMIC FUNDAMENTALS ARE THE BENCHMARK FOR RECOVERY**

Airports Council International (ACI) World has today published its 2021 Economics Report and industry Key Performance Indicators which explore the fundamentals of the industry as airports plan their long term recovery from the impact of the COVID-19 pandemic.

The report includes analysis for 2019 – the full year before the advent of the pandemic in 2020 – and includes data from more than 950 airports of all sizes and business models in all regions which represents 81% of worldwide air traffic. It provides a picture of a pre-COVID-19 industry therefore providing insight on the recovery pathway ahead.

In 2019, total airport revenue was \$180.9 billion, up from \$178.4 billion in 2018 (all figures in US Dollars). This 1.4% increase at the global level, howev-

er, is well below the 3.5% increase in air traffic over the same period, testifying to a real decrease in airport revenues on a per-traffic unit basis before the catastrophic loss in revenues brought on by the pandemic.

As airport competition has intensified, aeronautical revenue generated from airport charges per passenger remained stable, increasing at the same pace as global air transport demand.



11/05/2021

**LED BY T&I MEMBERS, BIPARTISAN GROUP INTRODUCES FAIR AND OPEN SKIES ACT**

Today, Chair of the House Committee on Transportation and Infrastructure Peter DeFazio (D-OR), Chair of the Subcommittee on Aviation Rick Larsen (D-WA), Vice Chair of the Committee Sharice Davids (D-KS), Vice Chair of the Subcommittee on Aviation Conor Lamb (D-PA), Representative Kaiali'i Kahele (D-HI), Ranking Member of the Subcommittee on Highways and Transit Rodney Davis (R-IL), and Representatives Drew Ferguson (R-GA), Bill Johnson (R-OH), Don Bacon (R-NE), and Jack Bergman (R-MI) introduced bipartisan legislation seeking to preclude new foreign airlines from operating to and from the United States when they exploit "flags of convenience" to avoid the regulations of their home

countries, or otherwise undermine labor standards. Specifically, this legislation requires the U.S. Department of Transportation (DOT) to ensure that any new foreign air carrier permit issued to a foreign airline that will fly between the United States and Europe under the U.S.-E.U.-Norway-Iceland Air Transport Agreement is consistent with the agreement's requirements regarding fair labor standards and fair competition. In addition, this legislation establishes that preventing entry into U.S. markets by foreign airlines exploiting flags of convenience or undermining labor standards is in the U.S. public interest, and it requires DOT to consider these factors before granting a future foreign air carrier permit.

12/05/2021

**AIRBUS RESUMES WORK ON MODERNISED A320 FAMILY FAL IN TOULOUSE**

Airbus has resumed work on the modernisation of its A320 Family industrial capabilities in Toulouse. This will provide Airbus with increased flexibility throughout its global industrial production system to respond to market recovery and future demand.

The modernised, digitally-enabled A320/A321 final assembly line (FAL) will replace one of the original Toulouse A320 FALs. It will be installed in the former A380 Lagardère facility and should be opera-

tional by end 2022. Initial plans to introduce A321 production capabilities in Toulouse were put on hold at the outset of the COVID-19 crisis, following the decision to reduce commercial aircraft production by around 40%. Now, with market recovery in sight and a potential return to pre-COVID production rates for single-aisle aircraft between 2023 and 2025, Airbus is resuming its activities for the project.



17/05/2021

## ICAO AND INTERNATIONAL CHAMBER OF COMMERCE ISSUE NEW JOINT STATEMENT ON PANDEMIC PUBLIC/PRIVATE COOPERATION PRIORITIES

Highlighting that efficient vaccine distribution and the sustainable recovery of air transport require extensive and global public-private cooperation, ICAO and the International Chamber of Commerce (ICC) have issued a new joint statement confirming several key areas of future cooperation on common priorities.

The new statement was formalized last week by the respective ICAO and ICC Secretaries General, Dr. Fang Liu and Mr. John W.H. Denton AO. It acknowledges the central role of international aviation in global economic and social development and international business, and stresses both parties' commitment to implement the ICAO Council Aviation Recovery Task Force's (CART) guidance and recommendations.

19/05/2021

## EASA PUBLISHES RESULTS OF FIRST EU STUDY ON CITIZENS' ACCEPTANCE OF URBAN AIR MOBILITY

The European Union Aviation Safety Agency (EASA) published results of the first study conducted in the European Union on Urban Air Mobility, showing that the majority of those questioned broadly welcome the prospect of services such as air taxis, air ambulances and drone deliveries but have concerns about potential issues such as safety, security, noise and the impact on wildlife.

Urban Air Mobility is a new air transportation system for passengers and cargo in and around urban environments. It is enabled by developments such as the enhancement of battery technologies and electric propulsion for vertical take-off and landing. It is expected to be deployed in Europe within three to five years, offering the potential to make urban mobility faster and greener.



20/05/2021

## EU DIGITAL COVID CERTIFICATE: PROVISIONAL DEAL BETWEEN PARLIAMENT AND COUNCIL

EP and Council negotiators reached on Thursday a provisional deal for an EU digital Covid certificate to facilitate free movement in Europe during the pandemic. The certificate will be available in either digital or paper format. It will attest that a person has been vaccinated against coronavirus or has a recent negative test result or has recovered from the infection. In practice, these will be three distinct certificates. A common EU framework will allow member states to issue certificates that will then be accepted in other EU countries.

The EU digital Covid Certificate regulation should be in place for 12 months. The certificate will not be a precondition to exercise the right to free movement and will not be considered a travel document.

20/05/2021

## ONEWORLD NAMES QATAR AIRWAYS GROUP CHIEF EXECUTIVE HIS EXCELLENCY MR AKBAR AL BAKER AS GOVERNING BOARD CHAIRMAN



Source: Qatar Airways

The Governing Board of the oneworld® Alliance has appointed Qatar Airways Group Chief Executive His Excellency Mr Akbar Al Baker as Chairman.

He succeeds Qantas Group CEO Alan Joyce, who had served in the role since September 2018.

As Chairman of the oneworld Governing Board, H.E. Mr Al Baker will oversee the alliance's governance, chair oneworld's Governing Board meetings and work closely with oneworld CEO Rob Gurney and the alliance's management team.

20/05/2021

## U.S. AIRLINES APPLAUD INTRODUCTION OF SUSTAINABLE SKIES ACT

Airlines for America (A4A), the industry trade organization representing the leading U.S. airlines, applauds the introduction of the Sustainable Skies Act by Reps. Brad Schneider (IL), Dan Kildee (MI) and Julia Brownley (CA). The legislation would establish a blender's tax credit for sustainable aviation fuel (SAF), which will spur the production of SAF and help the U.S. airline industry reach its goal of eliminating net carbon emissions by 2050 while also supporting U.S. jobs and energy security.

20/05/2021

## AIRPORT INDUSTRY RECONFIRMS AND ACCELERATES NET ZERO CO<sub>2</sub> TARGETS

At the second ACI EUROPE Aviation Sustainability Summit today, the airport trade body made a series of announcements reaffirming the commitment of Europe's airports to climate action and significantly raising their ambitions to achieve Net Zero CO<sub>2</sub> emissions – notwithstanding the on-going devastating impact of the COVID-19 pandemic:

- ACI EUROPE confirmed the commitment of the European airport industry to achieve Net Zero for CO<sub>2</sub> emissions under its control by 2050 at the latest.
- That commitment was initially launched in June 2019. Based

on Europe's airports 2019 traffic volumes and estimated carbon footprint, this Net Zero commitment will eliminate a total of 3.14 million tons of annual CO<sub>2</sub> emissions as of 2050.

- 235 airports run by 63 operators across 29 countries have now backed this industry commitment - thus individually committing to the same objective. In addition to all 211 airports that had done so before the COVID-19 crisis and that continue to stand by their pledge, a further 24 airports have joined the European airport industry commitment

to Net Zero today. These 235 airports accounted for 68% of European passenger traffic in 2019.

- Reflecting stepped up ambitions, 91 airports run by 16 operators are set to deliver on their Net Zero commitment already by 2030.



NET ZERO



**21/05/2021****NEW EUROCONTROL FOUR-YEAR FORECAST FINDS AIR TRAFFIC NOT EXPECTED TO REACH 2019 LEVELS UNTIL 2024 AT EARLIEST**

EUROCONTROL has issued a new forecast looking at the possible evolution of domestic and international air traffic in Europe over the coming four years taking into account the expected evolution of the COVID-19 pandemic. The report's key finding is that traffic is not expected to reach 2019 levels until 2024 at the earliest.

The first scenario foresees traffic returning to 2019 levels by 2024, assuming widespread vaccination take-up across the European network by summer 2021 coupled with a coordinated easing of travel

restraints, and the resumption of a few long-haul flows. This scenario is aligned with the airlines' plans for the summer months built on the pent-up demand effect, particularly for the VFR (Visiting Friends and Relatives) market. However, this first scenario is considered optimistic given the current state of vaccine rollout progress, with a coordinated approach across States less likely to be reached in the coming months. The second scenario remains most likely, whereby 2024 traffic recovers to 95% of the 2019 figure

based on widespread vaccination take-up across Europe and coordinated easing of travel restraints being reached by Q1 2022 between global regions, with more long-haul flows starting to return. The third, most pessimistic scenario assumes traffic in 2024 will only reach 74% of the 2019 figure, with a full recovery not before 2029. This scenario envisages persistent restrictions over the coming years owing to patchy vaccine uptakes and/or renewed outbreaks of new virus strains, with passenger confidence negatively impacted.

**25/05/2021****FEDERAL AVIATION ADMINISTRATION ANNOUNCES RESULTS OF MEXICO'S SAFETY ASSESSMENT**

The U.S. Department of Transportation's Federal Aviation Administration (FAA) today announced that the Government of Mexico does not meet International Civil Aviation Organization (ICAO) safety standards. Based on a reassessment of Mexico's civil aviation authority, the FAA has downgraded Mexico's rating to Category 2 from Category 1.

While the new rating allows Mexican air carriers to continue existing service to the United States, it prohibits any new service and routes. U.S. airlines will no longer be able to market and sell tickets with their names and designator codes on Mexican-operated flights. The FAA will increase its scrutiny of Mexican airline flights to the United States.

**26/05/2021****EASA COMPLETES FIRST CO<sub>2</sub> EMISSIONS CERTIFICATION FOR AIRBUS A330-900**

The European Union Aviation Safety Agency (EASA) has for the first time certified an aircraft for CO<sub>2</sub> emissions, applying a new process and methodology and so progressing towards its vision for an ever safer and greener civil aviation.

The new certification process provides an assessment of an air-

craft's fuel efficiency and therefore of the CO<sub>2</sub> it emits while in operation. In precise terms, the fuel efficiency in cruise flight is certified, which is influenced by the engines, but also by the aircraft's aerodynamic characteristics and weight. This certification is a key milestone on EASA's roadmap to establish, by 2022, an



environmental label for aviation. Amongst other values the label will use CO<sub>2</sub> emissions data to provide a comprehensive assessment of the environmental performance of an aircraft.

27/05/2021

### FAA: BOEING TO PAY AT LEAST \$17 MILLION TO SETTLE ENFORCEMENT CASES ON 737

The Boeing Company will pay at least \$17 million in penalties and undertake multiple corrective actions with its production under a settlement agreement (PDF) with the Federal Aviation Administration (FAA). The FAA found that the Chicago-based manufacturer installed equipment on 759 Boeing 737 MAX and NG aircraft containing sensors that were not approved for that equipment; submitted approximately 178 Boeing 737 MAX aircraft for airworthiness certification when the aircraft potentially had nonconforming slat tracks installed; and improperly marked those slat tracks.

01/06/2021

### EASA PROPOSES USE OF NEW TECHNOLOGIES TO SUPPORT ALL-WEATHER OPERATIONS

The European Union Aviation Safety Agency published a proposal to update the regulatory framework applicable to all-weather operations (AWOs) and flight crew training to allow the application of latest technological advancements. This proposal would increase the number of medium-sized aerodromes which are accessible for flight operations.

The concept of all-weather operations refers to the

ability of aircraft to take off and land in an airport under low visibility conditions. In such circumstances, technological support can ensure safe operations in situations that would otherwise pose safety challenges. While large aerodromes are, for the most part, already equipped for such operations, medium-size or regional airports had typically so far been unable to afford the investment required.

01/06/2021

### EU DIGITAL COVID CERTIFICATE: EU GATEWAY GOES LIVE WITH SEVEN COUNTRIES ONE MONTH AHEAD OF DEADLINE

Today, the EU Digital COVID Certificate has reached another important milestone with the go-live of the technical system at EU level, which allows to verify certificates in a secure and privacy-friendly way. The EU certificate was proposed by the Commission to resume safe travelling this summer. It will be free of charge, secure and accessible to all. Available in digital format or on paper, it will be a proof that a person has been vaccinated against COVID-19, tested negative, or recovered from an infection.



03/06/2021

## UNITED ADDING SUPERSONIC SPEEDS WITH NEW AGREEMENT TO BUY AIRCRAFT FROM BOOM SUPERSONIC

United Airlines today announced a commercial agreement with Denver-based aerospace company Boom Supersonic to add aircraft to its global fleet as well as a cooperative sustainability initiative – a move that facilitates a leap forward in returning supersonic speeds to aviation.

Under the terms of the agreement, United will purchase 15 of Boom's 'Overture' airliners, once Overture meets United's demanding safety, operating and sustainability requirements, with an option for an additional 35 aircraft. The companies will work together on meeting those requirements before delivery. Once operational, Overture is expected to be the first large commercial aircraft to be net-zero carbon from day one, optimized to run on 100% sustainable aviation fuel (SAF). It is slated to roll out in 2025, fly in 2026 and expected to carry passengers by 2029. United and Boom will also work together to accelerate production of greater supplies of SAF.



Source: United

03/06/2021

## EU TRANSPORT MINISTERS ADOPT POSITION ON SINGLE EUROPEAN SKY

Today's adoption by Transport Ministers of their EU Council position (General Approach) on the Single European Sky legislative package marks an important step towards a new regulatory frame-

work for the European air traffic management sector. Since the European Commission published its proposals last September, CANSO has seen this as an opportunity to enable our members,

Europe's air navigation services providers (ANSPs), to realise the digital transformation of aviation in order to build a smarter and more sustainable aviation system for many years to come.

03/06/2021

## EUROPEAN TRAVEL AND TOURISM SECTOR LAUNCHES “DESTINATION SUMMER” CAMPAIGN

As EU countries review the updated European Commission proposal to coordinate the easing of travel restrictions across Europe, Airlines For Europe (A4E), Airports Council International Europe (ACI EUROPE), the International Air Transport Association (IATA), and the European Travel Retail Confederation (ETRC) have together launched Destination Summer, with the goal of working with European Union and national policymakers to adopt a harmonised approach for the lifting of travel restrictions – enabling the safe and smooth resumption of free movement for European citizens.

Thanks to ongoing vaccination campaigns across Europe, growing scientific evidence around the efficacy of vaccines, increased testing capacities, and improvements in the epidemiological situation, the prerequisites are now in place to enable the reopening of travel and tourism in a coordinated manner

that is consistent with health measures and avoids unfair discrimination between vaccinated/non-vaccinated travellers. The coalition is calling for a common European approach based on:

- The restoration of freedom of movement in the EU, notably via the swift implementation of the EU Digital COVID Certificate;
- The roll-out of affordable, reliable and rapid EU testing capabilities, as needed, that allow for the end of blanket quarantines and make use of the growing availability of antigen tests;
- A push for a progressive resumption of non-essential international travel through a regular revision of the ‘EU White List’ -- and by allowing entry into the EU for travellers coming from third-countries with a good epidemiological situation, and for those inoculated with EU-authorised vaccines.

04/06/2021

## ASEAN AND THE EU CONCLUDE THE WORLD’S FIRST BLOC-TO-BLOC AIR TRANSPORT AGREEMENT

The Association of Southeast Asian Nations (ASEAN) and the European Union (EU) and its Member States have concluded the negotiations on the ASEAN-EU Comprehensive Air Transport Agreement (AE CATA) at the Extraordinary ASEAN-EU Senior Transport Officials Meeting held virtually on June 2.

The AE CATA is the world’s first bloc-to-bloc air transport agreement and will bolster connectiv-

ity and economic development among the 37 member states of ASEAN and the EU. Under the agreement, airlines of ASEAN and the EU will have greater opportunities to operate passenger and cargo services between and beyond both regions. Airlines of ASEAN and the EU will be able to fly any number of services between both regions. In addition, airlines will be able to fly up to 14 weekly passenger services, and

any number of cargo services via and beyond to any third country. The Agreement will help rebuild air connectivity between ASEAN and Europe which has been decimated by the COVID-19 pandemic and open up new growth opportunities for the aviation industry in both regions. Both parties expressed the intent to maintain close discussions and coordination to minimize disruptions to air services caused by the pandemic.



**ASSOCIATION  
OF SOUTHEAST  
ASIAN NATIONS**



08/06/2021

### NET ZERO BY 2050: ACI SETS GLOBAL LONG TERM CARBON GOAL FOR AIRPORTS

Airports Council International (ACI) World and the five ACI regions – in collaboration with members – have created a long-term carbon goal for their member airports:

*“ACI member airports at a global level commit to reach net zero carbon emissions by 2050 and urge governments to provide the necessary support in this endeavor.”*

Climate change is a global challenge requiring an urgent global response given the Intergovernmental Panel on Climate Change’s (IPCC) recent call to reach net zero carbon emissions by 2050. ACI’s long term carbon goal relates to the carbon emissions under the direct control of airport operators and will be a crucial component of the aviation industry’s contribution towards this global effort.

10/06/2021

### EASYJET PARTNER WRIGHT ELECTRIC ACHIEVES NEW MILESTONE WITH NEXT-GENERATION INVERTER TECHNOLOGY FOR ZERO-EMISSION AIRCRAFT

easyJet’s partner Wright Electric has revealed the latest milestone in its engine development programme which is working towards the development and certification of the first commercially viable, zero-emissions single-aisle aircraft.

Wright has now demonstrated the first inverter system of its kind for large zero-emissions aircraft.

Whether a future aeroplane is battery-electric or powered by a hydrogen fuel cell, an inverter is a key component in medium voltage aircraft electric systems. Its purpose is to convert the DC power from batteries to the AC power required by the propulsion system’s electric motors.

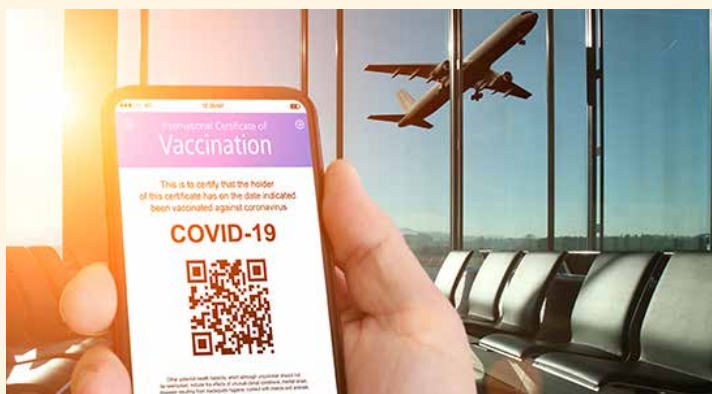
09/06/2021

### NEW ICAO VDS DELIVERS IMPORTANT BENEFITS FOR SECURE AND EFFICIENT COVID-19 TESTING AND VACCINATION VALIDATION

Delivering another important contribution to the international community’s efforts to realize a responsible and sustainable air transport recovery from the COVID-19 pandemic, ICAO has announced the publishing of new technical specifications for a Visible Digital Seal (VDS) for non-constrained environments.

The ICAO VDS stores datasets for test and vaccination certificates in a two-dimensional barcode which can be paper- or screen-based. Border control and other receiving parties can verify the data against established requirements efficiently and seamlessly, including through the use of traveller self-service kiosks and processes.

The VDS barcode is digitally signed for security, with the signature being based on the same public key cryptographic infrastructure principles already used to support ePassport issuance and authentication by more than 145 countries globally.



Source: easyJet

11/06/2021

**EASA PUBLISHES OPINION ON “MANAGEMENT OF INFORMATION SECURITY RISKS”**

The European Union Aviation Safety Agency published an Opinion on Management of Information Security Risks, aimed at safeguarding the entire civil aviation system against potential safety effects caused by cyberattacks. As information systems become more and more interconnected and are increasingly the target of malicious acts (whether directly or indirectly), the risks of such attacks, events and incidents in civil aviation are constantly increasing. The proposed new rules will make the aviation system more resilient to these information security events.

14/06/2021

**EU CLEARS WAY FOR THE EU DIGITAL COVID CERTIFICATE**

Today, the Presidents of the three EU institutions, the European Parliament, the Council of the EU and the European Commission attended the official signing ceremony for the Regulation on the EU Digital COVID Certificate, marking the end of the legislative process. On this occasion Presidents David Sassoli and Ursula von der Leyen and Prime Minister Antonio Costa said:

*“The EU Digital COVID Certificate is a symbol of what Europe stands for. Of a Europe that does not falter when put to the test. A Europe that unites and grows when faced with challenges. Our Union showed again that we work best when we work together. The EU Digital COVID Certificate Regulation was agreed between our institutions in the record time of 62 days. While we worked through the legislative process, we also built*



Source: EC

14/06/2021

**ACI EXTENDS GLOBAL AIRPORT HEALTH ACCREDITATION PROGRAMME**

Airports Council International (ACI) World has extended its Airport Health Accreditation programme which assists airports to demonstrate to passengers, regulators, and governments that they are prioritizing health and safety in a measurable, established manner.

The programme is supported by the International Civil Aviation Organization (ICAO) and, since it was launched in July 2020, more than 600 airports of all sizes have signed up to the programme. It has been updated this year and remains aligned with the latest ICAO Council Aviation Recovery Task Force (CART) Recommendations – and with the ACI EUROPE Guidelines for a Healthy Passenger Experience, which in turn are aligned with the EASA/ECDC Aviation Health Safety Protocol – and industry best practices. The guidelines are also aligned with the ACI's own updated Aviation Business Restart and Recovery publication. Accreditation is granted for 12 months and, as the first airports were accredited in August 2020, ACI has opened the programme for airports to be re-accredited for another 12 months.

*the technical backbone of the system, the EU gateway, which is live since 1 June.*

*We can be proud of this great achievement. The Europe that we all know and that we all want back is a Europe without barriers. The EU Certificate will again enable citizens to enjoy this most tangible and cherished of EU rights – the right to free movement. Signed into law today, it will enable us to travel more safely this summer. Today we reaffirm together that an open Europe prevails.”*

15/06/2021

**EU AND US TAKE DECISIVE STEP TO END AIRCRAFT DISPUTE**

European Commission Executive Vice-President Valdis Dombrovskis and US Trade Representative Katherine Tai reached an understanding relating to large civil aircraft, transforming almost 17 years of disputes into a forward-looking, collaborative platform to address bilateral issues as well as global challenges.

17/06/2021

**EASA/ECDC UPDATES AIR TRAVEL GUIDELINES TO FACTOR IN VACCINATION AND LATEST SCIENTIFIC EVIDENCE**

The European Union Aviation Safety Agency (EASA) and European Centre for Disease Prevention and Control (ECDC) today issued a new version of the Aviation Health Safety Protocol providing clear operational guidance and risk-based recommendations for health-safe air travel to complement the European Union's initiatives, such as the EU Digital COVID Certificates. The new version of the document takes into account new evidence and information such as the circulation

of variants of concern (VOCs) and the rollout of the COVID-19 vaccination programmes. The new version also emphasises the need to keep non-pharmaceutical measures in place – such as the wearing of medical face masks, hygiene measures and physical distancing. It is intended to provide support to national authorities in the Member States and to aviation stakeholders and is based on the latest scientific evidence, epidemiological situation and policy developments.



17/06/2021

**AVIATION SECTOR WELCOMES UPDATED EASA-ECDC AVIATION HEALTH SAFETY PROTOCOL CALLING FOR HARMONISED AND RISK-BASED COVID-19 TRAVEL MEASURES – MEMBER STATES MUST NOW IMPLEMENT**

- Report acknowledges positive epidemiological developments across Europe and low risk of virus spread during air travel.
- Risk-based approach will make travel easier for passengers by avoiding duplication of checks throughout the journey, including for transfer passengers.
- For first time ever, protocol supports the use of Rapid Antigen Tests and recognises potential capacity constraints at airport terminals due to continued physical distancing requirements.

18/06/2021

**BOEING COMPLETES SUCCESSFUL 737-10 FIRST FLIGHT**

Boeing's [NYSE: BA] 737-10, the largest airplane in the 737 MAX family, today completed a successful first flight. The airplane took off from Renton Field in Renton, Washington, at 10:07 a.m. and landed at 12:38 p.m. at Boeing Field in Seattle. *"The airplane performed beautifully,"* said 737 Chief Pilot Capt. Jennifer Henderson. *"The profile we flew allowed us to test the airplane's systems, flight controls and handling qualities, all of which checked out exactly as we expected."*

Today's flight was the start of a comprehensive test program for the 737-10. Boeing will work closely with regulators to certify the airplane prior to its scheduled entry into service in 2023.

(cont.'d ►)



18/06/2021

**BOEING COMPLETES SUCCESSFUL 737-10 FIRST FLIGHT** ▶ *cont.'d*

Source: Boeing

22/06/2021

**FAA PROVIDES \$8 BILLION IN AIRPORT RESCUE GRANTS**

The U.S. Department of Transportation's Federal Aviation Administration (FAA) will award \$8 billion in grants to keep U.S. airport workers employed, construction projects going and help U.S. airports recover from the impacts of the COVID-19 pandemic. The funding for the grants comes from the American Rescue Plan Act of 2021 President Biden signed into law on March 11, 2021.

28/06/2021

**ACI: INDUSTRY PARTNERSHIP DELIVERS SUPPORT FOR AIRPORTS IN FIGHTING WILDLIFE TRAFFICKING**

Airports Council International (ACI) World has today published guidance for airports in combatting the global illegal trade of protected species of wild animals and plants. The ACI Combatting Wildlife Trafficking Handbook has been developed with the support of

the USAID Reducing Opportunities for Unlawful Transport of Endangered Species (ROUTES) Partnership to assist airports in addressing this global crime. Elephants are often poached for their ivory and tigers for their skins and bones, for example, but

other species, such as rosewood, pangolins, birds, reptiles, rhinos and marine turtles, are also among commonly trafficked species. The illegal wildlife trade is estimated to have an annual value of up to \$23 billion (figures in US Dollars).

29/06/2021

**UNITED ADDS 270 BOEING AND AIRBUS AIRCRAFT TO FLEET, LARGEST ORDER IN AIRLINE'S HISTORY AND BIGGEST BY A SINGLE CARRIER IN A DECADE**

United Airlines today announced the purchase of 270 new Boeing and Airbus aircraft - the largest combined order in the airline's history and the biggest by an individual carrier in the last decade. The 'United Next' plan will have a transformational effect on the customer experience and is expected to increase the total number of available seats per domestic departure by almost 30%, significantly lower carbon emissions per seat and create tens of thousands of quality, unionized jobs by 2026, all efforts that will have a positive, ripple effect across the broader U.S. economy.

When combined with the current order book, United expects to introduce more than 500 new, narrow-body aircraft: 40 in 2022, 138 in 2023 and as

many as 350 in 2024 and beyond. That means in 2023 alone, United's fleet will, on average, add about one new narrow-body aircraft every three days.

United's new aircraft order - 50 737 MAX 8s, 150 737 MAX 10s and 70 A321neos - will come with a new signature interior that includes seat-back entertainment in every seat, larger overhead bins for every passenger's carry-on bag and the industry's fastest available in-flight WiFi, as well as a bright look-and-feel with LED lighting. The airline expects to fly the first 737 MAX 8 with the signature interior this summer and to begin flying the 737 MAX 10 and the Airbus A321neo in early 2023.



29/06/2021

## NEW DECISIONS AT ICAO COUNCIL'S 223RD SESSION SUPPORT AVIATION'S RECOVERY AND DEVELOPMENT

Responding to a variety of recent and emerging aerospace and geopolitical developments throughout its 223rd session, which concluded yesterday, the ICAO Council realized important progress towards facilitating the aviation sector's recovery from the impacts of the pandemic, towards enhancing the safety, security and sustainability of flight, and towards improving the governance of the UN's specialized agency for civil aviation.

The foundation of ICAO's COVID-19 recovery strategy is assuring the implementation of the recommendations of the ICAO Council Aviation Recovery Taskforce (CART). Prepared in cooperation with the

WHO and other UN and aviation bodies, its recommendations have been updated on a continuous basis throughout the pandemic in order to reflect the highly dynamic context, knowledge, and challenges.

This session, the Council reviewed the implementation of the most recent 'Phase III' guidance, which were adopted in March 2021, and discussed means by which to ramp up the momentum. The Council also addressed ICAO's preparations for its High Level Conference on COVID-19, which will take place in October. The Conference aims to promote and strengthen States' collective efforts, including through CART implementation.



Source: ICAO

30/06/2021

## FAA, EUROPEAN COMMISSION REAFFIRM COMMITMENT TO BUILD SAFER, MORE SUSTAINABLE AVIATION SYSTEM

The European Commission's Directorate-General for Mobility and Transport (DG MOVE) and the U.S. Department of Transportation's Federal Aviation Administration (FAA) affirmed their commitment to increasing aviation safety and building a more sustainable industry during a virtual meeting today with senior officials from both continents.

*"The EU-U.S. aviation partnership is a cornerstone of international aviation and has proven to be very*

*beneficial for both sides over the years," said Henrik Hololei, Director General of DG MOVE. "However, it is important to look ahead and continue to build on this strong, mutually beneficial, and future-oriented partnership. Today, we jointly confirmed our very close cooperation on aviation safety. Importantly, we also agreed that the reduction of emissions is the licence to grow for the aviation sector and shared our commitment for the decarbonization of air transport.*

(cont.'d ►)

30/06/2021

## FAA, EUROPEAN COMMISSION REAFFIRM COMMITMENT TO BUILD SAFER, MORE SUSTAINABLE AVIATION SYSTEM ▶ cont.'d

*Together, we will help the sector build back better."*

*"We've proven we can accomplish more, with better results, when we work together" said FAA Administrator Steve Dickson. "President Biden made this clear on his trip to Europe earlier this month. He reaffirmed the primacy of the U.S.-European alliance. The bonds we have forged through NATO and countless other areas continue to serve the interests of both sides. And nowhere is that more true than our relationship in aviation safety and sustainability."*

Officials discussed a wide range of initiatives during the European Union (EU) – U.S. Safe and Sustainable Aviation webinar. These included areas for further future safety cooperation, sustainable aviation fuels, more efficient operations, air traffic management modernization, quieter, more efficient aircraft and engine designs, and exploring breakthrough airframe and propulsion technologies that could accelerate the path to decarbonization.

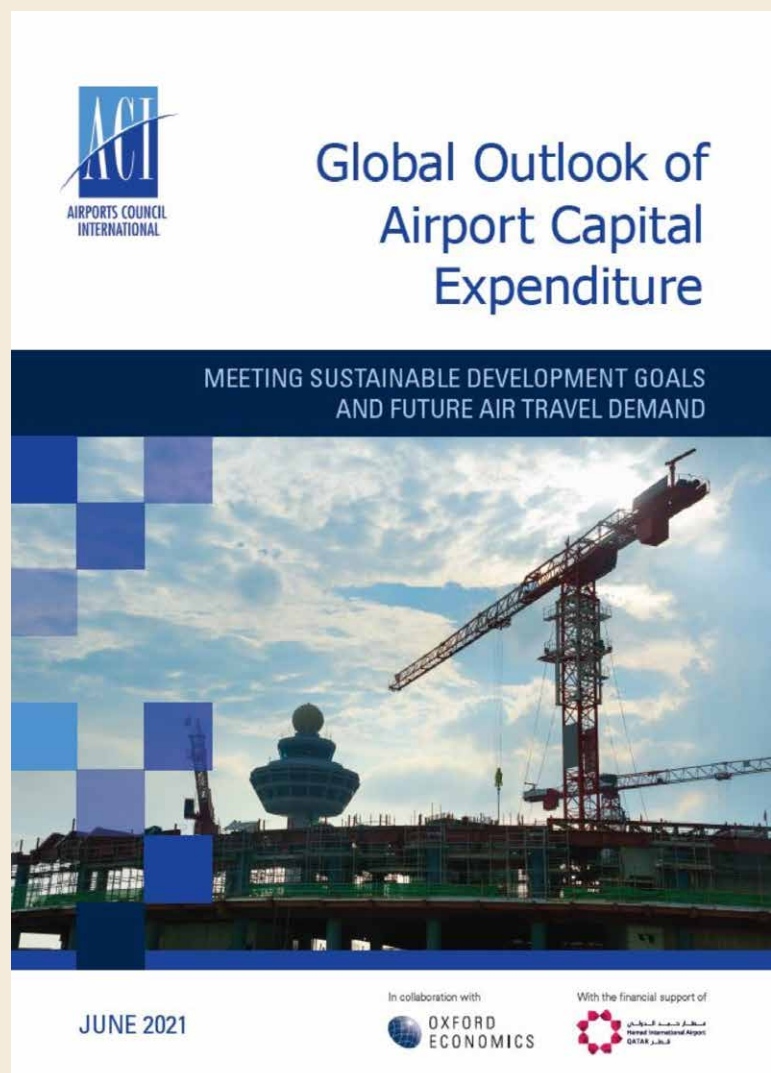
30/06/2021

## ACI WORLD REVEALS CAPITAL EXPENDITURE NEEDS FOR RECOVERY AND LONG TERM GROWTH

New Airports Council International (ACI) World forecasts for the global airport sector show that approximately \$2.4 trillion (figures in US Dollars) in airport total capital investments will be needed to address the long-term trend in passenger demand to 2040.

The Global Outlook of Airport Capital Expenditure – Meeting Sustainable Development Goals and Future Air Travel Demand, published today, shows that significant investment in new greenfield airports, as well as significant investment to expand and maintain existing airport infrastructure, is required. The study was supported by Hamad International Airport and developed in collaboration with Oxford Economics.

The estimated decline in capital expenditure between the pre-COVID-19 baseline year of 2019 and the depth of the global COVID-19 lockdown (2020) is 33% or about \$28 billion.





9 July

## *Air Transport Organisation Presents the Recommendations for 2021 Topic: "Resilience and Efficiency Through Leadership and Cooperation"*

**E**ffective leadership and cooperation among aviation stakeholders is essential to rebuilding the aviation industry from the COVID-19 pandemic. As a forum for industry thought leaders, Hermes Air Transport Organization has facilitated discussion on this topic. Briefs from 14 industry associations were received by Hermes, contributing to a report with recommendations for promoting leadership and collaboration.

As Dr. Kostas Iatrou, Director General of Hermes states, *"I am pleased that despite the challenges that commercial aviation faces we have the participation of 14 organizations. Now more than ever leadership plays a critical role for the relaunching of the industry. The recommendations will help all industry stakeholders to move forward."*

The industry associations are in strong agreement that leadership can be achieved under ICAO, and collaboration can take place at the regional and international levels. Specific recommendations in the Hermes report are the following:

- Develop ongoing cooperative research initiatives for risk assessment and risk abatement.
- Implement initiatives under leading organizations, most notably ICAO, to develop industry guidelines and protocols to enhance safety and efficiency and boost confidence and morale in the airline industry. These initiatives should include a robust Global Aviation Crisis Management Plan to ensure fast, effective responses to crises, such as global pandemics.
- Build back better. The aviation industry should further the cooperative initiatives developed during the pandemic to implement innovative technologies and procedures, both evolving and disrupting. These will facilitate aviation processes, contribute to safety and security, increase efficiency, and reduce the environmental footprint of the industry.

Professor Martin Dresner, who chaired the Hermes committee responsible for the report, notes that *"the pandemic, although devastating to the aviation industry and to society in general, represents an unprecedented opportunity for the industry to move forward. Although faced with many challenges, through cooperation and effective leadership, the industry believes that it can emerge stronger than ever."*





9 July

## Airlines for America (A4A) and Hermes Air Transport Organisation Announce New Memorandum of Understanding

**A**irlines for America (A4A) President and CEO **Nicholas E. Calio** and Hermes – Air Transport Organisation (Hermes) Director General **Dr Kostas Iatrou** met in Ekali, Greece to announce a Memorandum of Understanding (MOU) formalizing cooperation between the two organizations.

*"We are pleased to be strengthening our existing partnership with Hermes," said Calio. "We look forward to working collaboratively under the terms of the Memorandum to further promote the contribution of aviation to economies and communities around the globe."*

*"It is a great honour to sign this MoU with Airlines for America (A4A), the organisation that represents the North America airline industry, the major airlines of the world. Airlines for America has already contributed to our recommendations as it recognises the need for cooperation and exchange of ideas in the industry. This cooperation will deepen the relationship between the two organizations."* added Dr Iatrou.

The Memorandum went into effect on July 10, 2021.



Airlines for America®





9 July

## *University of the Aegean and the Hermes – Air Transport Organisation sign a Memorandum of Cooperation*



**O**n July 9, 2021, during the “2021 Hermes AGM & Leaders Forum” the University of the Aegean and the HERMES – Air Transport Organisation. signed a Memorandum of Cooperation. The main objective of the Memorandum is the development of actions, which will contribute to the liaison of the University with the aviation industry and the development of synergies. The main objective of the Memorandum is the development of actions, which will contribute to the liaison of the University with the aviation industry and the development of synergies.

- Designing market-driven educational programs and activities;
- Strengthening the scientific research in aviation in general and in emerging issues in particular;
- Generating new knowledge and developing innovative solutions to meet existing and emerged challenges;
- Addressing the gap between industry's requirements with respect to human resources and lack and/or mismatch of available skills and competences;
- Establishing a communication network for exchanging data, knowledge best, practices and hands-on experience in the field;
- Raising awareness in the field of education and training and creating synergies with other aviation industry stakeholders

The Rector of the University of the Aegean **Professor Dr Chrissi Vitsilaki** stated: *“The lack of specialized and properly trained staff is one of the contemporary challenges in the aviation industry. The University of the Aegean invests in the design and creation of new educational programs that meet the needs of the aviation industry. We design for industry, with industry”.*

**Professor Dr Andreas Papatheodorou**, Director of the Laboratory for Tourism Research and Studies

mentioned that *“This MoU is an excellent opportunity for the University of the Aegean to liaise with a very reputable international organization in the dynamic air transport sector and capitalize on the University's long tradition and brand recognition in tourism-related studies and research for the introduction of academic programmes in air transport”.*

**Jeff Poole**, President of Hermes – Air Transport Organisation said: *“As an organisation for leading personalities in the air transport sector, Hermes places a strong emphasis on training, education and development of aviation professionals. We are delighted to support this important strategic aim by entering this formal collaborative relationship with the University of the Aegean”.*

**Dr Kostas Iatrou**, Director General of Hermes – Air Transport Organisation said: *“I am pleased to sign this memorandum with the University of the Aegean, one of the most dynamic universities in Greece with an expertise in tourism and transport. The cooperation will put the basis for establishing an academic degree in the air transport sector”.*

The signing was witnessed by **H.E. Mr Harry Theoharis**, Greek Minister of Tourism.



## RESILIENCE AND EFFICIENCY THROUGH LEADERSHIP AND COOPERATION

### INTRODUCTION

*Last year will go down as the worst year ever in the history of international civil aviation.<sup>1</sup>*

*Just as aviation recovered from previous crises, the industry will recover again from this pandemic, but for this recovery to happen quickly, all stakeholders have to align as best possible.<sup>2</sup>*

*Leadership is everything.<sup>3</sup>*

The theme for this year's aviation discussion, initiated by Hermes Air Transport Organization, is "Resilience and Efficiency Through Leadership and Cooperation." Fourteen (14) briefs on this theme were received from various aviation organizations. This report attempts to distill the key observations from the briefs to arrive at recommendations for the aviation industry as it moves forward from the COVID-19 pandemic.

In soliciting the briefs from the aviation organizations, Hermes asked that three (3) major questions be considered as follows:

- What are the shared goals of the stakeholders in the aviation industry?
- Who should assume a leadership role in industry decision-making?
- Are there cooperative arrangements that could be put in place to guide individual state actions?

The responses to each of these questions are discussed, in turn.

### SHARED GOALS IN THE AVIATION INDUSTRY

As noted in the brief by AFRAA, since the COVID-19 pandemic was unanticipated by aviation organizations, it exposed weaknesses in industry leadership and the ability of aviation to coordinate an effective response to the pandemic. However, once these coordinated efforts were underway, there were goals shared by several industry and governmental associations. These included the following:

- Restore confidence in the safety of the aviation system. This involves taking measures to increase safety. The

AACO brief cites the safety of air travel and notes that 97.1% of infections are locally generated and that only 0.0000004% of infections occurred during air transport. It is paramount that the safety procedures implemented in the industry and the safety record of aviation be conveyed to the public and to policymakers.

- Conveyance and management of timely and relevant safety information. A key to the restoration of confidence in the aviation system is the transparent conveyance and management of information on aviation safety to the public.<sup>4</sup> For example, the ACAO brief states: *The path to establishing a more resilient aviation system is based on comprehensive communication, including the establishment of close, transparent and continuous communication between all stakeholders, as well as towards the public. Coordinated and clear information and an emphasis on safety, security and operational integrity of aviation systems will enhance compliance with actions taken to reduce risks and help develop resilience to crises while addressing recovery and demand growth.*
- Keep infected passengers away from flying. Although viral transmission may be rare during flights, the JAATO brief notes that aviation contributed to the COVID-19 pandemic by transporting infected passengers around the globe, thus leading to the spread of the virus. As a result, a shared goal of the industry is to keep infected passengers away from flying. There are several ways that this can be done; for example, through rapid testing or the use of "green passports". The proposed methods may vary across the different regions, but the overall goal of keeping infected passengers off airplanes is universal.<sup>5</sup>
- Coordinate safety initiatives. Some briefs received by Hermes expressed frustrations with unilateral state actions that closed borders and restricted air traffic. The AASA brief is illustrative of this sentiment, stating that during the pandemic, *"we have seen the most amazing display of the use of state authority to enforce regulations ... to impose restrictions and mea-*

*tures to control their citizens in ways not considered possible in an open society.”* The brief recommends that governments abide by internationally agreed plans or provide reasons why these plans are not embraced and/or supported.

- “Build back better” is a common goal mentioned in several of the briefs. The IFATSEA brief, for example, notes that the pandemic has created the opportunity for managers, companies, and employees to learn from the crisis. Quoting Winston Churchill, the European Commission discussion paper further intones, *“never let a good crisis go to waste.”* The briefs note that the pre-pandemic aviation system had significant problems; for example, the EUROCONTROL brief states that the aviation industry was already under tremendous pressure prior to the pandemic with flight delays and an aviation management system, *“struggling to deliver enough airspace capacity and cost-efficiency, and unable to advance on key dossiers, particularly regarding the slow pace of delivering the Single European Sky (SES).”* Other briefs cite the environmental record of the aviation industry. Along these lines, in his interview with Hermes Magazine, ICAO Council President Salvatore Sciacchitano states, *“The post-COVID period will no doubt provide aviation with a tremendous opportunity to build back better, to recover greener. This is an opportunity to accelerate the transition of the global air transport network toward its decarbonized future.”*
- Make better use of technology. Certainly, one way to build back better is to focus on the realization of technological advancements. For example, although privacy and fairness are major issues, using technology to increase the efficient and safe movement of passengers and cargo is a shared goal of the associations. Digitalization and the effective use of Artificial Intelligence were also extensively discussed in the 2020 Hermes report.

## LEADERSHIP IN INDUSTRY DECISION MAKING

To achieve the goals cited above, there must be cooperative initiatives in the aviation industry and these initiatives require leadership to be launched and to succeed. Several briefs note the leadership of ICAO during the pandemic, especially through the ICAO Council Aviation Recovery Task Force (CART), that provides a forum for determining risk management strategies for the industry. ICAO, in conjunction with other intergovernmental

organizations, such as the World Health Organization (WHO) and the United Nations World Tourism Organization (UNWTO), will undoubtedly continue to lead in determining how best to operate aviation safely, efficiently, and environmentally following the pandemic.

Other initiatives have taken place at the regional level. For example, the European Aviation Round Table (ART) developed industry proposals to facilitate aviation post-pandemic. The LACAC brief describes a roundtable, in which directors and representatives of the aeronautical authorities of Latin America and the Caribbean, with the support of the Aeronautical Authority of Singapore, discussed how to restart civil aviation and build resilience in the industry and its related business ecosystem.

The main shortcoming of the initiatives is not lack of leadership, but the failure of states to implement the guidelines and policies enunciated through these collaborative efforts, resulting in inconsistent, unpredictable policies, even within regions. EUROCONTROL writes: *“State actions during COVID have shown that different legislative frameworks across Europe create a patchwork of confusing and fragmented measures. Without coherent legislative frameworks, the airlines in particular but also the associated industry partners do not have the certainty and predictability that they need to return to profitability and then to grow in a sustainable manner.”* These views are echoed by ERA: *“The current patchwork of restrictions across Europe is still, one year later, causing confusion among Europe’s travel and tourism industries, its workers and passengers. Lack of predictability on these measures effectively impedes air transport connectivity, which puts employment at risk across the sector. Unilateral approaches implemented by the Member States inevitably risk harming the EU both economically and socially.”* A similar situation exists in Africa, as stated in the AFRAA brief: *“Travel restrictions by Governments in a bid to curb the spread of the pandemic negatively impacted demand for air travel and disrupted supply chains thus resulting in adverse consequences for the air transport industry. There seems to be over-reliance on States to decide for the industry with or without consultation.”*

Therefore, the way forward from the COVID-19 pandemic is not only to determine effective leaders – ICAO, industry associations, and regional organizations can certainly assume this mantle, but to better ensure that the guidelines put in place at forums initiated by these leaders are followed by the relevant authorities.



## COOPERATIVE AGREEMENTS

There is widespread sentiment among the industry and governmental groups that cooperative agreements need to be established to guide the industry in the post-pandemic world. Although there are debates over the content of these agreements, the associations recognize that the current “patchwork” system of regulations that have developed during the pandemic are inefficient, inequitable, and unsustainable. The U.S. airline trade group, A4A, for example, states the following:

*We believe that the continued recovery of aviation and increased resilience of global governance frameworks are dependent on two equally critical elements: 1) ongoing and frequent engagement by industry stakeholders; and 2) improved cooperation and collaboration between governments worldwide...*

*The inconsistent approach taken by each region throughout the COVID-19 pandemic has led to fragmented policies regarding travel restrictions and preventative measures. This patchwork not only adds costs that hamper recovery but also creates uncertainty for businesses and travelers throughout the world... It is critical that existing guidance, such as that produced by ICAO CART, is implemented by all participating nation states to allow for a more coordinated approach to the resumption of travel.*

As noted above, the major issue is having governments and other decision makers follow international guidelines. With this in mind, JAATO proposes a “future risk” research body that will support contingency planning and provide evidence-based solutions to potential industry problems, such as how the industry should respond to the next pandemic. Certainly, an independent organization that can proactively conduct research into risks assessment and mitigation for the industry could be useful when confronting governments contemplating unilateral actions in crisis management.

## RECOMMENDATIONS

Based on the briefs submitted to Hermes Air Transport Organization, it appears that the industry is quite unified in its shared goals to restore confidence in aviation and to build back a better industry. There is strong sentiment, as well, that intergovernmental and inter-industry associations should lead the post-pandemic recovery. Finally, cooperative initiatives are seen as key to developing guidelines for recovery.

**With these thoughts in mind, the following recommendations are proposed:**

- Develop ongoing cooperative research initiatives for risk assessment and risk abatement. Evidence-based research can be key to reducing threats to the industry from unilateral state initiatives in crisis management, as well as in providing important information to disseminate to the public, the policymakers and all other involved stakeholders.
- Continue industry initiatives under leading organizations, most notably ICAO, to develop industry guidelines and protocols to enhance safety and efficiency and boost confidence and morale in the airline industry.
- Build back better. Although the COVID-19 pandemic contributed an unprecedented blow to the aviation industry, it also represents an excellent opportunity to build back better. Therefore, the industry should further the cooperative initiatives developed during the pandemic to implement innovative technologies and procedures, both evolving and disrupting. These will facilitate aviation processes, contribute to safety and security, increase efficiency, and reduce the environmental footprint of the industry.

As climate change and the need for sustainable development moves up the political agenda, now more than ever we need to show that aviation is part of the solution, and not part of the problem. Such aggressive targets as the development of net zero carbon goals will help assure the right kind of conscientiousness from our industry.

## 2021 Hermes Report Committee

### Chair

**Professor Martin Dresner**

*University of Maryland & Chair, ATRS*

### Members

**- Dr Olumuyiwa Benard Aliu**

*Honorary Member, Hermes - Air Transport Organisation & founder and President of iPADIS*

**- Angela Gittens**

*Board Member, Hermes - Air Transport Organisation*

**- Professor Dr Andreas Papatheodorou**

*Editor-in-Chief, Journal of Air Transport Studies*

## REFERENCES

1. ACI World Position Paper: Resilience and Efficiency through Leadership and Cooperation.
2. ERA Position Paper: Resilience and Efficiency through Leadership and Cooperation.
3. AFRAA Position Paper: Resilience and Efficiency through Leadership and Cooperation.
4. The EUROCONTROL brief, for example, notes the provision of “think papers”, weekly assessments, dashboards and daily data tweets.
5. The AFCAC brief, noting the importance of safety measures in aviation, is quite adamant that proof of vaccine should not be a prerequisite for international travel.





**Italian Hipster smiles**  
**at Athens International Airport**  
Ceramic, 2019 A.D.

THE AUTHENTIC SMILES

**SALVATORE  
SCIACCHITANO**

President of the  
Council, ICAO



| ICAO



***What are the upcoming challenges of the recovery phase?***

The Council, through the work of its Council Aviation Recovery Task Force (CART) has identified three key areas which will require the continued coordination and commitments of States, UN agencies, international and regional organizations, and industry. The first of these is the planning of national risk management strategies to gradually reduce reliance on public health measures and reactivate economic activity.

The second area of key priority concerns the possibly profound implications for traditional air transport due to COVID-19, and whether in terms of its business models or operations.

The third key area the Council has identified concerns the priority for us to learn together from COVID-19 to improve overall air transport crisis preparedness, enhance economic and environmental sustainability, and enable smarter operations. To help countries explore the specifics of these and other challenges, and, in particular, to sensitize governments to make aviation the highest priority in their political agendas, the Council has approved a High-Level Conference on COVID-19 to be convened by ICAO this coming October.

Another priority is to move the work forward on aviation climate action. The post-COVID period will no doubt provide aviation with a tremendous opportunity to build back better, to

recover greener. This is an opportunity to accelerate the transition of the global air transport network toward its decarbonized future. ICAO will continue to support bold action in this regard. ICAO will lead the sector along this path for a green recovery. And ICAO will ensure that No Country is Left Behind.

***What lessons have we learned from this global crisis?***

It remains to be seen how the pandemic more specifically will affect the organization over the longer-term, but certainly we can expect that issues which every major company and organization are now facing will have impacts at ICAO as well. This would in-



clude ICAO meetings being able to be attended both in-person or virtually, and more ICAO staff working remotely. There will be a new normal on the way we work and the way we travel by air. Definitely a more digital, resilient and sustainable one.

The Council and Secretariat are continuously working to identify new efficiencies to help ICAO be more streamlined, inclusive and cost-effective for the countries it serves.

***What direction will ICAO take in a post-pandemic world? How will the Organization reinvent itself to become even more relevant and responsive to the needs of its member States and the air transport industry at large?***

ICAO was already in the process of modernizing itself before the pandemic struck, and primarily to help accelerate the safe and effective standardization and regulation of air transport innovations, given the speed at which these are arriving today.

This priority is only made more relevant given the current expectations that further innovations will be required for the new normal ahead, whether to make the sector more resilient to future communicable disease threats, more accessible to new types of aircraft and operations, or greener and more sustainable to address the international aviation effect on the global climate.

For this reason, the Council of ICAO has recently decided to establish a Consultative Forum with Industry on Innovation. This consultative forum between the Council of ICAO and Aviation Industry leaders aims at increasing ICAO awareness on technological innovation and exploring how ICAO can support its introduction.



***In light of the pandemic, are countries still on course to meet their CORSIA objectives?***

Their main priority is still on in-sector measures to reduce CO<sub>2</sub> emissions, including green aircraft technologies and innovations, operational improvements, and increasing use of sustainable fuels and clean energy. As the first global market-based measure for any industry sector, CORSIA plays a complementary role to ensure the achievement of ICAO Member States' collective goal of 2020 carbon-neutral growth for international aviation.

Today, CORSIA implementation is fully on track and ICAO has completed all necessary steps for the start of the CORSIA pilot phase on 1 January 2021. Despite the unique challenges associated with the COVID-19 pandemic, we have seen significant progress in States on the timely implementation of the CO<sub>2</sub> Monitoring, Reporting and Verification (MRV) procedures, thanks to the robust ICAO Assistance, Capac-

ity-building and Training programme for CORSIA (ACT-CORSIA).

***What role will the industry have to play with respect to ICAO post-pandemic? How can industry stakeholders better engage with ICAO in the future?***

The aviation industry is already well-represented through formal IATA, ACI, ICCAIA, IBAC, IFALPA and CANSO involvement with ICAO and now will also contribute through the ICAO Industry Consultative Forum highlighted above. Indeed, we've been very grateful to have the voice of the aviation industry advising us through every step of the CART process.

Under the current new circumstances, ICAO is adapting its processes to maintain engagement at a more strategic level. Additionally, we continue coordinating with all the stakeholders, elaborating the best practices and ensuring that no one is left behind.





# **The African Air Transport Sector in the Post COVID-19 Era: Resilience and Efficiency Through Leadership and Cooperation**

THURSDAY 1 JULY 2021

*Join Zoom Meeting*

*<https://aegean-gr.zoom.us/j/91019301466>*

Organizers



THURSDAY 1 JULY 2021

# The African Air Transport Sector in the Post COVID-19 Era: Resilience and Efficiency through Leadership and Cooperation

Media Partner



**Hermes – Air Transport Organisation and iPADIS co-organised an insightful online event regarding the issues, challenges and opportunities which may arise, in the African Air Transport market, in the post COVID-19 era. The panel consisted of several African aviation stakeholders, who shared their opinions regarding the needed actions which will provide resilience and efficiency to the industry through mutual efforts and initiatives.**

The event started with the warm welcome of Denis Chagnon, Board Member of IPADIS, who introduced the participants while Professor Andreas Papatheodorou from the University of the Aegean that sponsored the Zoom link for the event underlined the strong trade and tourism links between Greece and many African countries as well as the importance of leadership and cooperation for the resilience of the African and global aviation industry.

**Dr. Olumuyiwa Benard Aliu**, *President of IPADIS*, welcomed all the participants and highlighted the great impact of COVID-19 on the global aviation industry. He referred to the severe impact of the pandemic in the African continent while he pointed out







that IPADIS is determined to contribute to the resilience of the African tourism and air transport sector by providing guidelines, practical solutions, and long-term strategies.

Next, **Dr. Kostas Iatrou**, *Director General of Hermes – Air Transport Organisation*, highlighted the continuous collaboration between the Organisation and several African aviation stakeholders and presented the event contributors and panellists.

In the first keynote address **Salvatore Sciacchitano**, *President of the ICAO Council*, who demonstrated the great impact of the pandemic on the global aviation market as well as the even bigger effect on the African market, which suffered a decrease of 68%, compared to the 2019 capacity levels. However, he pointed out that the air freight sector displayed a steep increase and in 2020 the air cargo levels surpassed those of 2019. Moreover, Salvatore Sciacchitano indicated that ICAO projected a loss of more than USD 500 billion on operating revenues for the industry while USD 14 billion relate to the African aviation market. The President of the ICAO Council said that “Deterioration of the economic viability of the aviation sector affects the entire economic ecosystem”, underlining that the industry needs assistance from the governments to boost its financial position and mitigate the negative impacts of the pandemic. He

also mentioned the importance of preservation of air connectivity as well as the great impact of aviation on jobs. Moreover, there was a brief introduction of the upcoming ICAO Conference which will be dedicated to the impact of COVID-19 by focusing on the short and long-term Implications for aviation companies, the operational challenges, and the proposed policies for operations in the post COVID-19 era. Finally, Salvatore Sciacchitano focused on the need of standardisation of the procedures regarding the certification of vaccinations as well as the harmonisation and common visions by the policies which will assist a faster recovery. The President once again highlighted that ICAO would continue to provide support and guidelines for a safe, secure, and sustainable restart of the industry.

The second keynote speaker, **Luis Felipe de Oliveira**, *Director General of ACI* highlighted the several challenges the airport is currently facing. He identified the unequal distribution of the vaccines as a point of concern; however, he argued that the aviation industry seems to enter to a new phase projecting promising result. The Director General of ACI highlighted safety and security as the top priorities for all airports which will play important role on the recovery of the industry. Also, he mentioned that this global pandemic demands global collaboration between all industry stakeholders as well as government bodies. He recognised CART guidelines

as vital for the harmonisation of the processes among the industry while he introduced ACI's programme on establishing health protocols. He referred to both, local and global challenges, for the airports such as capacity issues, infrastructure, changing business models and regimes. Next, he focused on the African continent and the great potential of the market. He pointed out some of the issues which need to be addressed by the African countries; however, he remained confident that implementing the "no country left behind" vision as well as the establishment of African Open Skies the continent has a bright future.

The Leaders Panel addressed the impact of COVID-19 on the global aviation industry as well as its impact on the African continent. The Panel was moderated by **Jeff Poole**, *President of Hermes – Air Transport Organisation*, who referred to the slow vaccination processes and their impact on the recovery of the African air transport sector. He also pointed out that health considerations have damaged air transport despite the advocacy of industry's stakeholders and that in most cases there were bilateral and national approaches rather than a common strategy. Moreover, he indicated that there is a strong need to build back better and introduce new business models and development through sustainability. The President of Hermes underlined that leadership and cooperation are some of the tools which could restore the confidence of travellers, rebuild the industry, and finally bring resilience. At last, Jeff Poole identified that new measures need to be undertaken; new initiatives must be introduced and that there is a strong need for a change of the existing mind sets.

**Tefera Mekonnen Tefera**, *Secretary General of AFCAC* mentioned the unprecedented challenges which COVID-19 has brought to the African aviation industry. He focused his speech on the ways AFCAC is trying to address the challenges and align with the international guidelines. He also mentioned that a great part of this constant transformation includes strategies towards safety, security, sustainable and cooperative actions for the viability of the industry. Tefera Mekonnen Tefera introduced AFCAC's long term strategy plan, in collaboration with ICAO, to define the main strategies for the future of the organisation as well as its main business plan for the next three years. The Secretary General of

AFCAC said that the organisation is closely working with IATA to provide guidelines for African airlines on safety certification processes. At the same time, AFCAC established vital workshops to address ICAO policies on aeronautical charges and fees, which finally resulted to the harmonisation of several processes as well as the removal of several tariff barriers, thus the decrease of costs for the African airlines. Tefera Mekonnen TEFERA concluded by referring to the establishment of a Single African Air Transport market as well as to the strong collaboration between governmental bodies and industry stakeholders.

**Abdérachmane Berthe**, *Secretary General of African Airline Association – AFRAA* first highlighted the severe implications of COVID-19 for the African Airlines. He pointed out the major decrease on capacity, traffic as well as revenue losses which is in contrast with the major surge on cargo loads and revenues. Furthermore, he discussed the importance of air transport for the continent as well as the significance of standard procedures harmonisation to face the challenges. He also mentioned that low-speed vaccination processes become threat for the recovery of the industry, and that the expedition of vaccinations is the key to restart the industry. The Secretary General of African Airline Association identified that the future of the African air transport industry demands strong leadership and cooperation both on airline and continental stakeholder basis. The need for a commission to help airlines is as critical. He finalised his speech by suggesting several recommendations for the African airlines such as adoption and rethink of their current business models, operation of cargo flights, restructuring of their fleet and network planning and improvement of connectivity by codeshare agreements.

**Chris Zweigenthal**, *Chief Executive of the Airlines Association of Southern Africa – AASA*, focused his speech on the relation between airlines and governments. He admitted that governments applied several restrictions during the pandemic and falsely linked airlines with the spread of COVID-19. He pointed out the different phases on the relationship between governments and airlines on a pre, in and post COVID-19 era. His recommendation was the adoption of a true and strong relationship with the



decision making and regulatory bodies. The need for governments to understand the importance of aviation, and vice versa, seems essential. At last, he referred to the several and continuous lockdowns which did not give the opportunity to the airlines to project a stable and sustainable recovery.

**Ali Tounsi** *Secretary General, ACI Africa*, presented the situation on behalf of the African airports. He mentioned that there is a steep decline on capacity and revenues for the African airports while at the same time there is great uncertainty due to the lack of coordinated vaccination campaign. Ali Tounsi highlighted the continuous support of ACI towards African airports, by providing guidelines, recovery protocols for safety and efficiency as well as harmonised procedures for health protocols. Furthermore, the Secretary General underlined the role of airports in the establishment of a safe, secure, and sustainable future. Finally, he identified five major challenges, which the African aviation market needs to face to enter the new normality and finally start recovering:

- Need for a dialogue among African governments and aviation stakeholders in order to implement harmonised health and travel protocols
- Viable, Universal and Accessible Covid-19 testing facilities for travellers
- Boost of the vaccination processes
- Relaxation of travel restrictions for fully vaccinated and negative-tested travellers
- Adoption of digital vaccination certificate from all African countries

Next, Jeff Poole asked the participants about the actions which the air transport sector can undertake and the possible sources for leadership in the African region.

Ali Tounsi referred to the tangible actions that need to be followed and the continuous cooperation between the aviation stakeholders and governments. He identified that the ICAO CART guidelines are a great tool but not the solution to the problem. Boost of vaccination processes as well as harmonisation of the procedures are mandatory actions for the African continent. At last, he expressed his thoughts on the fact that slow vaccination processes could have a grave effect on the African region.

Chris Zweigenthal agreed on the fact that the complexity of the aviation sector has created communication problems and that all these stakeholders need to notify governments regarding the impact of their decisions. He expressed his belief that the existing leadership can assist the African aviation sector through standard procedures and proper communications.

Abdérhmane Berthe admitted the complexity of the various systems in the industry, which have brought limited results so far. He identified the need for a dialogue between stakeholders and national authorities, as vital for the future of the industry in the continent. He also recognised the importance of vaccination processes as key for the resilience of air transport sector. Last, he confessed that airlines have limited role on the formulation of the several decisions and asked for their greater cooperation.

Tefera Mekonnen TEFERA introduced the idea that “no country left behind” and asked from governments to support the African aviation market. The financial relief of airlines, airports and service providers is key for their financial viability. Moreover, he referred to the fact that CART guidelines are critical to be followed and he mentioned that the cooperation of the airlines and the reconsideration of their business models are essential for their future viability.

Finally, all participants agreed that stronger leadership and cooperation are the main factors that could ensure the resilience of the industry.

**In his concluding remarks**, Dr Olumuyiwa Benard Aliu, President of IPADIS, thanked all the participants and pointed out that COVID-19 had a great impact on the African region. He recognised the importance of the CART guidelines and directed all stakeholders towards harmonisation strategies with both the governmental and health authorities. He mentioned that this should be a joint effort which demands strong leadership and cooperation. Finally, he highlighted the significance of the connectivity within the continent, the restructuring of airlines’ business models, the need for the adoption of cargo operations and the promotion of intercontinental and domestic market access.



**HERMES**  
AIR TRANSPORT ORGANISATION



# 2021

## **HERMES AGM & LEADERS FORUM** Resilience and Efficiency Through Leadership and Cooperation

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## 2021 Hermes AGM & Leaders Forum

*On Friday 9th of July the Hermes Air Transport Organisation carried out the "Hermes AGM & Leaders Forum – Resilience and Efficiency Through Leadership and Cooperation" by hosting some of the most executive members of the global aviation industry.*

The event began with a welcome by **Dr. Kostas Iatrou**, *Director General of Hermes – Air Transport Organisation*, who summarised the three recent major industry events held by the Organisation. Next, Angela Gittens, 2021 Hermes Recommendation Committee Member & Hermes Board Member, referred to the great impact of COVID-19 on the global aviation industry. She stressed that a single voice for the industry is vital for its viability in the future and pointed out that the leading role of industry associations on the post COVID-19 era. **Angela Gittens** identified ICAO guidelines for safety

and security as important for the establishment of a secure aviation environment for the future, together with all stakeholders presenting a credible profile towards decision making parties as well as people, to regain their trust.

**Jeff Poole**, *President of Hermes – Air Transport Organisation* welcomed all participants and presented the values and priorities of the Organisation as an association of prominent leaders in air transport. He referred to 2020 as the "worst year for aviation" and highlighted the strategies needed to restore the





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confidence of governments and passengers to enable a quick recovery of the industry. He identified the present crisis as a great opportunity for aviation companies to cooperate in order to build a better and more sustainable future through new technologies and business processes. He addressed that resilience could be obtained through efficiency and common visions as well as that this Leaders Forum should present clear, deliverable recommendations to ensure the future of the aviation sector.

Next, **Luis Felipe de Oliveira**, *Director General of ACI & Hermes VP and Treasurer*, presented the great impact of the COVID-19 crisis on airlines and airports. He spoke about the financial struggle of the airports as well as the new phase of the pandemic after vaccinations became widespread and effective. He identified that the main target for the industry should be a safe and secure environment

for the passengers which will play an important role on the full recovery of aviation. Luis Felipe de Oliveira pointed out that collaboration of the bodies within the industry is vital. He recognised that the ICAO CART guidelines are important for the establishment of a secure and safe environment, so ACI is committed to follow the CART programme. Moreover, ACI recognises that strong sustainability policies and measures are key to reach the industry's goal of carbon neutrality.

His Excellency **Harry Theoharis**, *the Greek Minister of Tourism*, emphasised the importance of tourism and aviation for Greece as well as how COVID-19 has impacted the Greek tourism market. He addressed the role of the EU on the development of common strategies and decisions in order to face the pandemic, and he identified that at the moment all governments should force their strategies



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towards an e-certificate policy and digital transformation. He pointed out that mechanisms and knowhow are now available to successfully address another pandemic wave. Finally, he identified that the aviation brand has to be preserved when at the same time the issue of sustainability should be a high-priority on any decision-making process.

Hermes - Air Transport Organisation signed a Memorandum of Cooperation with the University of the Aegean and a Memorandum of Understanding with Airlines for America (A4A). From the counterparts' side, the former was signed by Professor Andreas Papatheodorou and the latter by the *President and CEO of Airlines for America (A4A) Nick Calio*.

Next, **Professor Papatheodorou** moderated a two-part round table discussion with the participation of:

- **Henrik Hololei**, *Director-General-DG MOVE, European Commission & Hermes Board Member*
- **Nick Calio**, *President and CEO of A4A*
- **Montserrat Barriga**, *Director General of ERA*
- **Dr Rafael Echevarne**, *Director General of ACI LAC*
- **Jose Ricardo Botelho**, *Executive Director & CEO of ALTA*

In the first part, the participants expressed their opinions on the need for true leadership when the air transport industry enters to its recovery mode.

**Henrik Hololei**, *Director-General-DG MOVE, European Commission & Hermes Board Member*, pointed out the fact that the demand for flying remains high. However, he believes the aviation sector needs to regain travellers' confidence by ensuring a safe and secure environment.





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He added that the COVID-19 pandemic is an opportunity for the air transport sector to establish protocols and cooperative initiatives. He focused on the EU market and the need for the opening of the EU-US market and expressed his confidence that through cooperation the future of European aviation market will be better. Finally, he emphasised the importance of emerging sustainability strategies. Sustainable aviation fuels and technology could assist the aviation industry to achieve its carbon emission targets.

**Nick Calio**, *President and CEO of Airlines for America (A4A)*, talked about the competitive advantage of the Greek tourism market as well as the importance of the establishing common airline and passenger protocols for the safe and health flight operations. Nick Calio introduced the idea of a consortium for independent assessment of

the risk management which airlines need to implement in such times. He emphasised the complexity of mitigating all the layers of risks for the airlines, especially when the US market is open for many international flights. Nick Calio also identified the fragility of the aviation industry but acknowledged that the implementation of new and emerging technologies remains a great opportunity.

**Monserrat Barriga**, *Director General of ERA* introduced the main concerns of Europe's Regional Airlines during and after the pandemic. She summarised them as:

- Survival of the company/organisation
- Recovery of the aviation sector
- Protection of revenues
- Removal of travel restrictions





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- Effective restart of operations
- Grow through sustainability
- Debt management

She spoke about the impact of the COVID-19 crisis on the regional aviation market and the need to introduce new rules and regulations to face future challenges. However, she believes that regional airlines will continue to operate with the necessary investments and provide efficient intra-European air connectivity through new routes.

**Dr. Rafael Echevarne**, *Director General of ACI in the LAC*, mostly focused on the Latin American region, presenting the importance of aviation as well as the fact that several countries have not opened their borders yet. He referred

to the lack of cooperation between airlines and health authorities and to the major impact of the political decisions on the operations of both airlines and airports.

Moreover, he referred to the importance of ACI in Latin America and the great potential for aviation in the region. Dr. Rafael Echevarne identified sustainability as one of the top priorities for the ACI LAC and the fact that Latin American airports should invest in sustainability strategies. Finally, he emphasised that technology is the key for the future viability and evolution of the industry.

**Jose Ricardo Botelho**, *Executive Director and CEO of ALTA*, pointed out the fact that leadership demands responsibility. He identified the fact that standardised measures will bring stability to air transport operations, while recognising that the different needs of each country



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need to be addressed individually. Vaccination certificates as well as passport information are only a few of the tools available.

He added that the industry has the knowledge and the mechanisms to regain the confidence of the travellers and it needs a single, coordinated voice to the world. Jose Ricardo Botelho addressed the upcoming issue of the electric airplanes and expressed his thoughts over the operations of such aircraft in long distances.

In the SECOND PART of the discussion, all participants addressed the issue of realising the potential of new business models and stronger collaboration in the recovery of the air transport industry.

**Henrik Hololei** highlighted that air transport is one of the most affected sectors by COVID-19 and should be considered holistically along with others closely related. He mentioned the need for a change for both ICAO and IATA and he promoted a cooperation model. He addressed other risks that aviation industry is facing and pointed out that the industry should be ready for the next crisis. He presented five main pillars for the recovery of the industry at a European level, i.e.:

- Further consolidation
- More investment in infrastructure
- Sustainability
- New, smart solutions
- Digitalisation





## 2021 Hermes AGM & Leaders Forum

**Nick Calio** spoke about the economic and jobs contribution of airlines, while he identified technology as the way to make travels better. He added that airlines' prime objective is the construction of a survival plan and now more than ever airlines need to send a unified message to governments.

**Jose Ricardo Botelho**, once again highlighted the necessity of air connectivity for the Latin American Region while he also pointed out that the industry needs to approach the decision makers as well as to influence the international organisations.

**Last, Jeff Poole**, *President of Hermes*, provided a brief summary of the discussions and conclusions of the Leaders Forum.

Subsequently, the Hermes – Air Transport Organisation held its Annual General Meeting. Jeff Poole, President of Hermes, introduced and declared Dr. Fang Liu as Honorary Member. **Dr. Kostas Iatrou presented** the annual report of Hermes and all of Organisation's actions during the last year while Luis Felipe de Oliveira presented the financial statements for the fiscal year of 2021. The meeting continued with the election of the new Board of Members, with Eamonn Brennan replacing Robert Deillon. Finally, Dr. Kostas Iatrou and Jeff Poole presented certificates to three new members of Hermes (in alphabetical order):

- Jeff Peet
- Ioannis Stavlas
- Patricia Vercelli





## 2021 Hermes AGM & Leaders Forum





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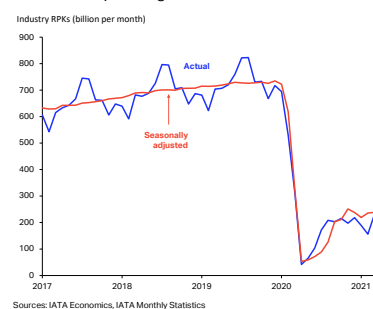


# STATISTICS

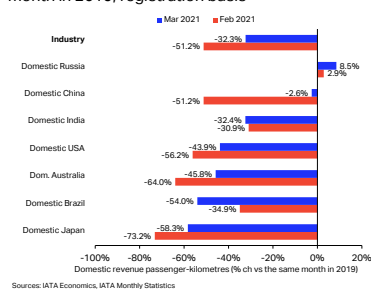


## MAR 2020: Air Passenger Market Analysis

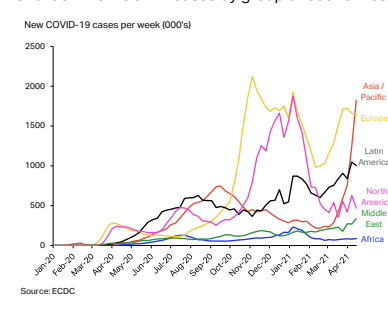
**Chart 1 – Air passenger volumes**



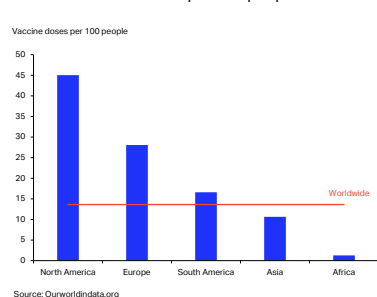
**Chart 2 – Domestic RPK growth versus the same month in 2019, registration basis**



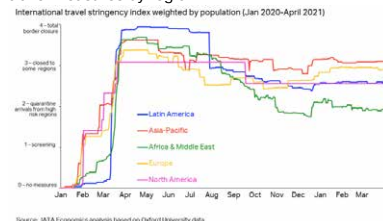
**Chart 3 – New COVID cases by group of economies**



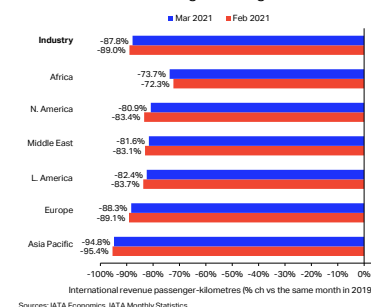
**Chart 4 – Vaccine doses per 100 people**



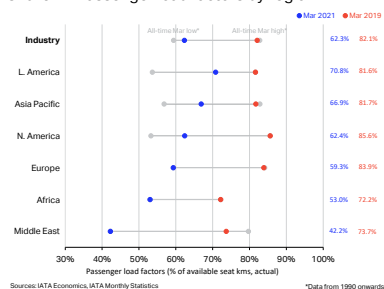
**Chart 5 – Stringency of government international air travel measures by region**



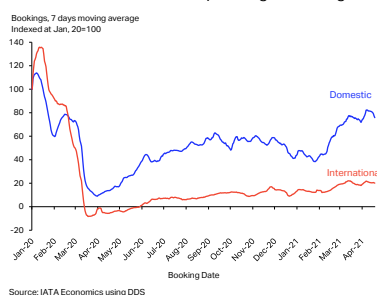
**Chart 6 – International RPK growth versus the same month in 2019 (airline region of registration basis)**



**Chart 7 – Passenger load factors by region**



**Chart 8 – Trends in forward passenger bookings**



### Air passenger market detail - March 2021

To aid understanding, the table includes both % comparisons with pre-crisis 2019 months and 2020 months.

	World share <sup>1</sup>	March 2021 (% ch vs the same month in 2019)				March 2021 (% year-on-year, 2020)			
		RPK	ASK	PLF (%-pt) <sup>2</sup>	PLF (level) <sup>3</sup>	RPK	ASK	PLF (%-pt) <sup>2</sup>	PLF (level) <sup>3</sup>
TOTAL MARKET	100.0%	-67.2%	-56.8%	-19.7%	62.3%	-26.3%	-29.7%	2.9%	62.3%
Africa	1.9%	-71.8%	-61.6%	-19.2%	53.0%	-41.0%	-36.9%	-3.6%	53.0%
Asia Pacific	38.6%	-60.4%	-51.6%	-14.8%	66.9%	11.8%	-5.0%	10.0%	66.9%
Europe	23.6%	-81.7%	-74.1%	-24.5%	59.3%	-62.0%	-56.4%	-8.8%	59.3%
Latin America	5.7%	-64.5%	-59.1%	-10.8%	70.8%	-40.7%	-43.0%	2.7%	70.8%
Middle East	7.4%	-80.3%	-65.6%	-31.4%	42.2%	-61.0%	-45.2%	-17.1%	42.2%
North America	22.7%	-57.2%	-41.3%	-23.2%	62.4%	-11.2%	-24.2%	9.2%	62.4%
International	45.7%	-87.8%	-77.4%	-37.2%	43.7%	-70.7%	-58.7%	-17.8%	43.7%
Africa	1.6%	-73.7%	-61.8%	-22.3%	49.0%	-45.7%	-38.2%	-6.8%	49.0%
Asia Pacific	11.0%	-94.8%	-87.0%	-48.6%	31.9%	-82.5%	-70.5%	-21.7%	31.9%
Europe	18.5%	-88.3%	-80.0%	-35.0%	49.4%	-74.4%	-64.4%	-19.4%	49.4%
Latin America	2.2%	-82.4%	-77.4%	-18.1%	63.6%	-67.5%	-66.0%	-3.0%	63.6%
Middle East	7.0%	-81.6%	-67.2%	-32.3%	41.3%	-63.6%	-47.7%	-18.0%	41.3%
North America	5.5%	-80.9%	-62.6%	-41.0%	42.9%	-56.7%	-39.2%	-17.4%	42.9%
Domestic	54.3%	-32.3%	-20.5%	-12.5%	71.6%	36.9%	8.3%	15.0%	71.6%
Dom. Australia <sup>4</sup>	0.7%	-45.8%	-34.7%	-13.5%	65.8%	-10.5%	-15.9%	3.9%	65.8%
Domestic Brazil <sup>4</sup>	1.6%	-54.0%	-44.2%	-14.3%	66.6%	-32.2%	-26.5%	-5.6%	66.6%
Dom. China P.R. <sup>4</sup>	19.9%	-2.6%	9.1%	-9.1%	75.9%	210.9%	148.2%	15.3%	75.9%
Domestic India <sup>4</sup>	2.1%	-32.4%	-14.0%	-18.5%	68.2%	0.8%	8.2%	-5.1%	68.2%
Domestic Japan <sup>4</sup>	1.5%	-58.3%	-45.7%	-17.6%	58.1%	-9.3%	-38.5%	18.7%	58.1%
Dom. Russian Fed. <sup>4</sup>	3.4%	8.5%	0.9%	6.1%	86.5%	28.3%	-4.1%	21.9%	86.5%
Domestic US <sup>4</sup>	16.6%	-43.9%	-28.5%	-18.6%	68.0%	12.6%	-16.9%	17.8%	68.0%

<sup>1</sup>% of industry RPKs in 2020

<sup>2</sup>Change in load factor vs same month in 2019

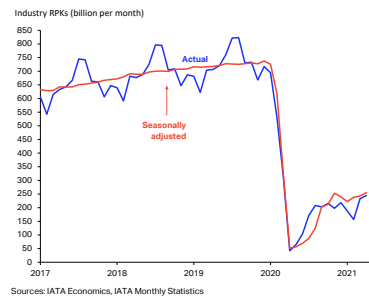
<sup>3</sup>Load factor level

<sup>4</sup>Note: the seven domestic passenger markets for which broken-down data are available account for approximately 46% of global total RPKs and 84% of total domestic RPKs

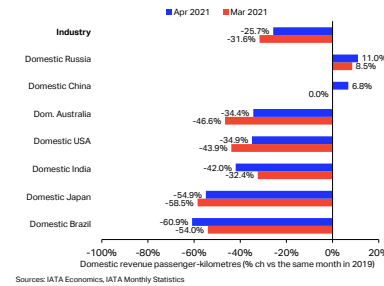


# APR 2021: Air Passenger Market Analysis

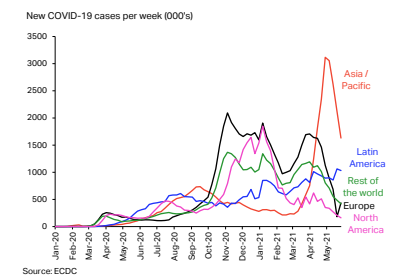
**Chart 1 – Air passenger volumes**



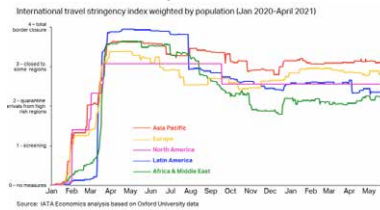
**Chart 2 – Domestic RPK growth versus the same month in 2019, registration basis**



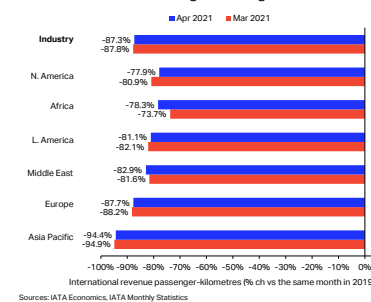
**Chart 3 – New COVID cases by group of economies**



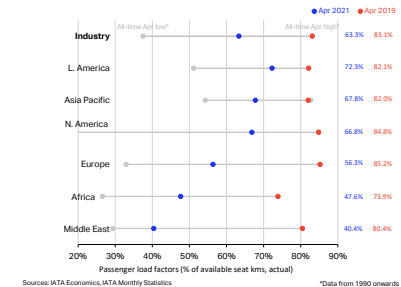
**Chart 4 – Stringency of government international air travel measures by region**



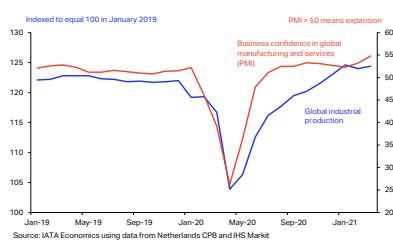
**Chart 5 – International RPK growth versus the same month in 2019 (airline region of registration basis)**



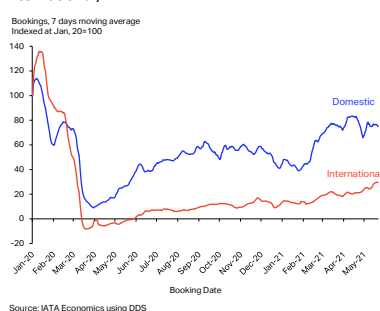
**Chart 6 – Passenger load factors by region**



**Chart 7 – Global industry production and business confidence**



**Chart 8 – Trends in passenger bookings (domestic vs international)**



## Air passenger market detail - April 2021

To aid understanding, the table includes both % comparisons with pre-crisis 2019 months and 2020 months.

	World share <sup>1</sup>	April 2021 (% ch vs the same month in 2019)				April 2021 (% year-on-year, 2020)			
		RPK	ASK	PLF (%-pt) <sup>2</sup>	PLF (level) <sup>3</sup>	RPK	ASK	PLF (%-pt) <sup>2</sup>	PLF (level) <sup>3</sup>
<b>TOTAL MARKET</b>	<b>100.0%</b>	<b>-65.4%</b>	<b>-54.5%</b>	<b>-19.8%</b>	<b>63.3%</b>	<b>483.9%</b>	<b>245.4%</b>	<b>25.9%</b>	<b>63.3%</b>
Africa	1.9%	-76.7%	-63.8%	-26.2%	47.6%	1190.1%	619.5%	21.1%	47.6%
Asia Pacific	38.6%	-57.2%	-48.3%	-14.2%	67.8%	255.4%	184.6%	13.5%	67.8%
Europe	23.7%	-81.5%	-72.0%	-28.9%	56.3%	780.2%	414.4%	23.4%	56.3%
Latin America	5.7%	-64.7%	-59.9%	-9.8%	72.3%	799.9%	536.5%	21.2%	72.3%
Middle East	7.4%	-81.7%	-63.4%	-40.1%	40.4%	550.0%	372.5%	11.0%	40.4%
North America	22.7%	-50.7%	-37.4%	-18.0%	66.8%	1407.7%	224.7%	52.4%	66.8%
<b>International</b>	<b>45.7%</b>	<b>-87.3%</b>	<b>-76.0%</b>	<b>-39.0%</b>	<b>43.8%</b>	<b>667.9%</b>	<b>407.9%</b>	<b>14.8%</b>	<b>43.8%</b>
Africa	1.6%	-78.3%	-64.0%	-29.1%	43.9%	1556.2%	678.8%	23.3%	43.9%
Asia Pacific	11.0%	-94.4%	-86.3%	-47.7%	33.5%	216.2%	178.8%	4.0%	33.5%
Europe	18.5%	-87.7%	-78.2%	-37.3%	48.4%	940.0%	546.7%	18.3%	48.4%
Latin America	2.2%	-81.1%	-75.8%	-18.0%	64.6%	984.1%	686.0%	17.8%	64.6%
Middle East	7.0%	-82.9%	-65.3%	-41.1%	39.6%	502.9%	339.1%	10.8%	39.6%
North America	5.5%	-77.9%	-59.3%	-37.8%	45.0%	1438.2%	702.1%	21.6%	45.0%
<b>Domestic</b>	<b>54.3%</b>	<b>-25.7%</b>	<b>-15.3%</b>	<b>-10.4%</b>	<b>73.4%</b>	<b>443.9%</b>	<b>196.5%</b>	<b>33.4%</b>	<b>73.4%</b>
Dom. Australia <sup>4</sup>	0.7%	-34.4%	-26.4%	-8.7%	72.0%	2332.1%	909.1%	42.1%	72.0%
Domestic Brazil <sup>4</sup>	1.6%	-60.9%	-58.7%	-4.2%	77.6%	465.4%	380.2%	11.7%	77.6%
Dom. China P.R. <sup>4</sup>	18.9%	6.8%	16.3%	-6.9%	78.2%	201.8%	156.5%	11.7%	78.2%
Domestic India <sup>4</sup>	2.1%	-42.0%	-15.1%	-27.3%	60.3%	N/A	N/A	N/A	60.3%
Domestic Japan <sup>4</sup>	1.5%	-54.9%	-32.6%	-22.8%	46.2%	244.9%	41.3%	27.3%	46.2%
Dom. Russian Fed. <sup>4</sup>	3.4%	11.0%	12.4%	-1.0%	79.9%	543.5%	198.9%	42.8%	79.9%
Domestic US <sup>4</sup>	16.6%	-34.9%	-24.0%	-12.4%	73.5%	1473.6%	181.4%	60.3%	73.5%

<sup>1</sup>% of industry RPKs in 2020

<sup>2</sup>Change in load factor vs same month in 2019

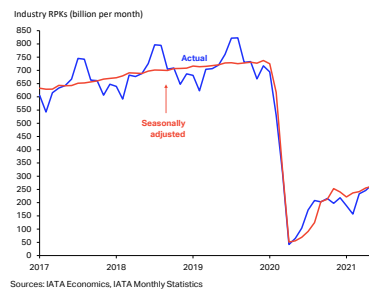
<sup>3</sup>Load factor level

<sup>4</sup>Note: the seven domestic passenger markets for which broken-down data are available account for approximately 46% of global total RPKs and 84% of total domestic RPKs

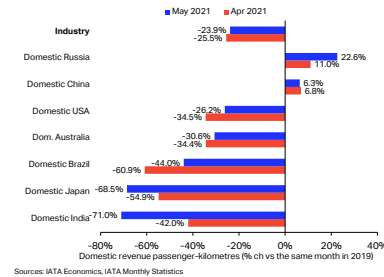


# MAY 2021: Air Passenger Market Analysis

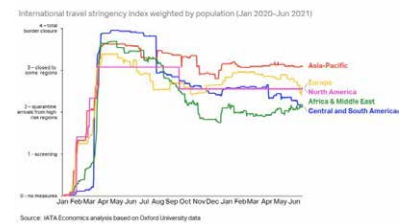
**Chart 1 – Air passenger volumes**



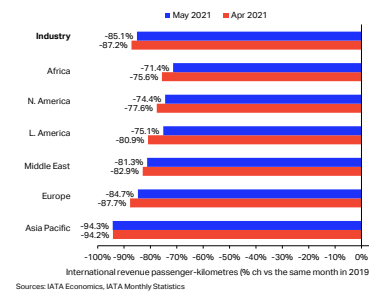
**Chart 2 – Domestic RPK growth versus the same month in 2019, registration basis**



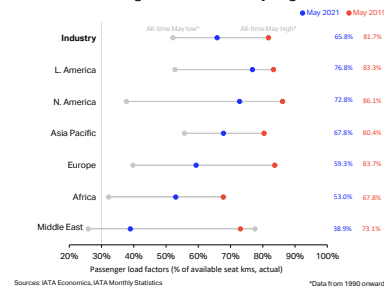
**Chart 3 – Stringency of government international air travel measures by region**



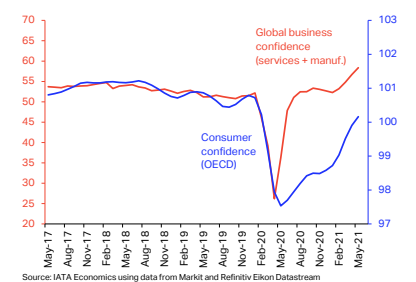
**Chart 4 – International RPK growth versus the same month in 2019 (airline region of registration basis)**



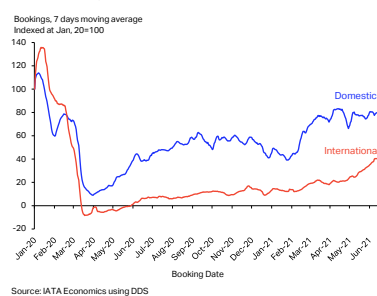
**Chart 5 – Passenger load factors by region**



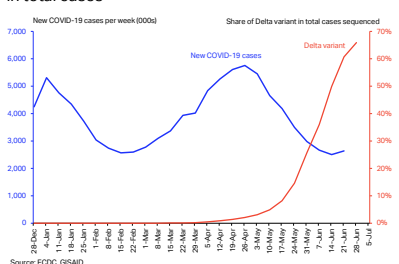
**Chart 6 – Business and consumer confidence indices**



**Chart 7 – Trends in passenger bookings (domestic vs international)**



**Chart 8 – New COVID cases vs share of Delta variant in total cases**



## Air passenger market detail - May 2021

To aid understanding, the table includes both % comparisons with pre-crisis 2019 months and 2020 months.

	World share <sup>1</sup>	May 2021 (% ch vs the same month in 2019)				May 2021 (% year-on-year, 2020)			
		RPK	ASK	PLF (%-pt) <sup>2</sup>	PLF (level) <sup>3</sup>	RPK	ASK	PLF (%-pt) <sup>2</sup>	PLF (level) <sup>3</sup>
TOTAL MARKET	100.0%	-62.7%	-53.7%	-15.9%	65.8%	312.4%	228.6%	13.7%	65.8%
Africa	1.9%	-69.4%	-60.9%	-14.8%	53.0%	1258.9%	725.1%	20.8%	53.0%
Asia Pacific	38.6%	-59.5%	-52.0%	-12.6%	67.8%	122.5%	106.1%	5.0%	67.8%
Europe	23.7%	-77.9%	-68.8%	-24.4%	59.3%	838.2%	528.6%	19.6%	59.3%
Latin America	5.7%	-57.4%	-53.8%	-6.5%	76.8%	821.0%	648.2%	14.4%	76.8%
Middle East	7.4%	-79.6%	-61.6%	-34.1%	38.9%	797.7%	496.9%	13.0%	38.9%
North America	22.7%	-44.0%	-33.8%	-13.3%	72.8%	643.2%	284.9%	35.1%	72.8%
International	45.7%	-85.1%	-74.6%	-33.2%	47.3%	776.0%	487.5%	15.6%	47.3%
Africa	1.6%	-71.4%	-61.8%	-16.9%	50.2%	1391.9%	721.0%	22.6%	50.2%
Asia Pacific	11.0%	-94.3%	-86.4%	-45.5%	33.2%	198.8%	193.9%	0.5%	33.2%
Europe	18.5%	-84.7%	-75.7%	-31.3%	52.9%	1014.2%	681.5%	15.8%	52.9%
Latin America	2.2%	-75.1%	-69.9%	-14.6%	69.5%	1239.8%	785.7%	23.5%	69.5%
Middle East	7.0%	-81.3%	-63.7%	-35.3%	37.7%	766.9%	462.1%	13.2%	37.7%
North America	5.5%	-74.4%	-58.5%	-32.2%	51.7%	1399.3%	691.0%	24.4%	51.7%
Domestic	54.3%	-23.9%	-15.7%	-8.1%	75.9%	249.6%	162.9%	18.8%	75.9%
Dom. Australia <sup>4</sup>	0.7%	-30.6%	-22.8%	-7.7%	68.4%	2150.7%	1305.2%	25.7%	68.4%
Domestic Brazil <sup>4</sup>	1.6%	-44.0%	-44.2%	0.4%	82.1%	528.6%	445.0%	10.9%	82.1%
Dom. China P.R. <sup>4</sup>	19.9%	6.3%	12.7%	-4.7%	79.3%	97.9%	71.7%	10.5%	79.3%
Domestic India <sup>4</sup>	2.1%	-71.0%	-50.1%	-37.7%	52.3%	1142.9%	1117.9%	1.1%	52.3%
Domestic Japan <sup>4</sup>	1.5%	-68.5%	-44.0%	-32.0%	41.1%	238.6%	121.2%	14.3%	41.1%
Dom. Russian Fed. <sup>4</sup>	3.4%	22.6%	28.2%	-3.5%	76.4%	609.7%	290.1%	34.4%	76.4%
Domestic US <sup>4</sup>	16.6%	-26.2%	-18.3%	-8.4%	79.1%	593.0%	240.8%	40.2%	79.1%

<sup>1</sup>% of industry RPKs in 2020

<sup>2</sup>Change in load factor vs same month in 2019

<sup>3</sup>Load factor level

<sup>4</sup>Note: the seven domestic passenger markets for which broken-down data are available account for approximately 46% of global total RPKs and 84% of total domestic RPKs



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

#### GLOBAL KEY FIGURES

**JAN 2021**  
(versus JAN 2020)

**RPK** ▼ -72.5% **ASK** ▼ -59.3% **FTK** ▼ 6.1%

**LF**: 54.1% ▼ -3.4 pt

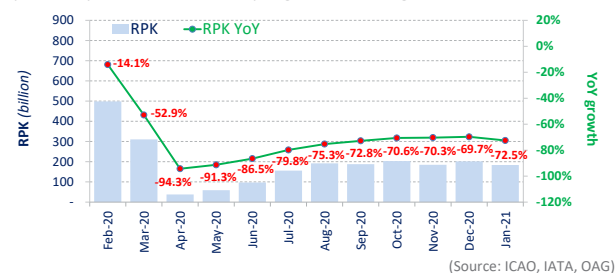
**OUTLOOK\* - FEB 2021**  
(versus FEB 2020)

**ASK** ▼ -57.7% \* Source OAG

#### PASSENGER TRAFFIC

##### Revenue Passenger-Kilometres - RPK

World passenger traffic fell by -72.5% YoY in January 2021, -2.8 percentage points lower than the decline in the previous month. Entering into the new year, the pandemic intensified across the globe, with emergence of more contagious virus variants and imposition of stricter control measures. Consequently, 2021 started with a worsening decline in passenger traffic, the first deterioration since bottoming out from the lowest point of the crisis in April. Domestic traffic was mostly impacted, particularly in China where traffic plunged due to the tightened travel restrictions.

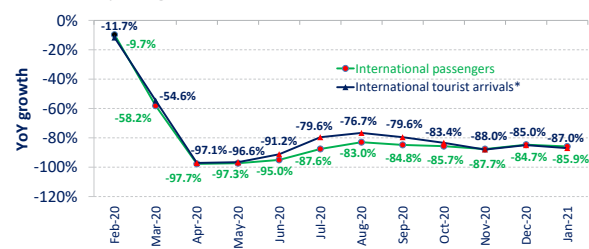


(Source: ICAO, IATA, OAG)

##### International Passengers vs. Tourist Arrivals

International passenger numbers fell by -85.9% YoY in January 2021, -1.2 percentage points down from the decline in the previous month. International traffic remained muted across all regions and further weakened, affected by the pandemic acceleration and new lockdowns.

The international tourist arrivals also remained stagnant and followed a similar trend as international passenger traffic.



\* UNWTO Definition

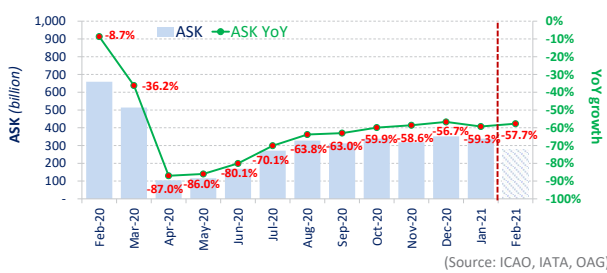
(Source: ICAO, UNWTO)

#### CAPACITY

##### Available Seat-Kilometres - ASK

Capacity worldwide fell by -59.3% YoY in January 2021, -2.6 percentage points down from the decline in the previous month (-56.7%).

Amid the surge of new COVID-19 cases and increasing travel restrictions, capacity is likely to stay at the similar level as in February 2021 with a decline of -57.7% YoY.

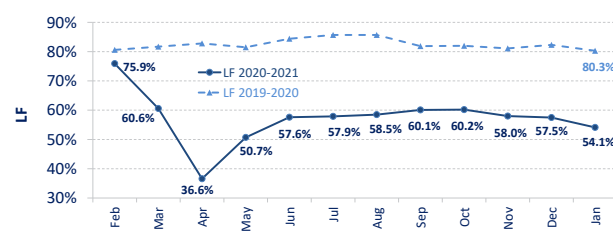


(Source: ICAO, IATA, OAG)

##### Load Factor - LF

The passenger Load Factor reached 54.1% in January 2021, -3.4 percentage points lower than the previous month.

As air travel demand fell faster than capacity, the January LF deteriorated to the lowest level since May 2020, and was -26.2 percentage points lower than the rate in the same period of 2020.

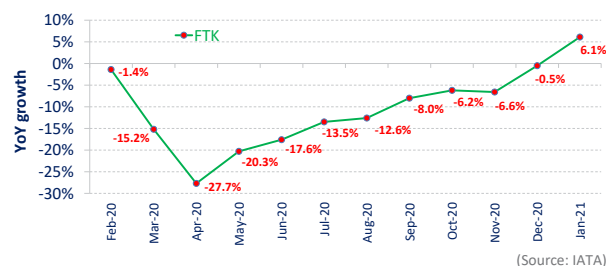


(Source: IATA)

#### FREIGHT TRAFFIC

##### Freight Tonne-Kilometres - FTK

World freight traffic reported a growth of +6.1% YoY in January 2021, +6.6 percentage points up from the fall in the previous month. After experiencing 21-month of continuous YoY decline since April 2019, freight traffic finally saw positive growth and exceeded the 2019 levels. Despite the renewed outbreaks, air cargo demand remained robust supported by the recovery in economic activities, and strengthening in manufacturing and goods trade. Air cargo demand improved in all regions, particularly in Africa and North America where traffic has expanded double-digitally. The Middle East also grew solidly, while Latin America/Caribbean posted the weakest performance and was the only region recording negative growth.



(Source: IATA)

**ACRONYMS:** **ACI:** Airports Council International; **ASK:** Available Seat-Kilometres; **IATA:** International Air Transport Association; **FTK:** Freight Tonne-Kilometres; **LF:** Passenger Load Factor; **OAG:** Official Airline Guide; **RPK:** Revenue Passenger-Kilometres; **UNWTO:** World Tourism Organization; **YoY:** Year-on-year; **YTD:** Year-to-date.



ICAO

# ECONOMIC DEVELOPMENT

## JAN 2021: Air Transport Monthly Monitor

World Results and Analyses. Total scheduled services  
(Domestic and international)

### TOP 15 AIRPORTS (Ranked by aircraft departures, passengers and volume of freight)

JAN 2021: -30.4%, -49.2%, and +21.0% YoY in terms of aircraft departures, passengers and freight for the Top 15

JAN 21

Airports (ranking by number of departures)	Departures	YoY	Airports (ranking by number of passengers)	Passengers*	YoY	Airports (ranking by tonnes of freight)	Freight**	YoY
Atlanta GA, US (ATL)	25,391	-30.9%	Atlanta GA, US (ATL)	1,677,439	-59.6%	Hong Kong SAR, CN (HKG)	407,000	15.8%
Dallas/Fort Worth TX, US (DFW)	23,532	-18.5%	Guangzhou, CN (CAN)	1,623,486	-43.9%	Memphis TN, US (MEM)	393,332	15.3%
Chicago IL, US (ORD)	19,119	-46.5%	Dallas/Fort Worth TX, US (DFW)	1,540,593	-46.7%	Shanghai, CN (PVG)	352,240	35.0%
Denver CO, US (DEN)	19,048	-25.4%	New Delhi, IN (DEL)	1,534,822	-49.7%	Anchorage AK, US (ANC)	284,232	49.8%
Charlotte NC, US (CLT)	17,098	-31.2%	Chengdu, CN (CTU)	1,459,066	-35.5%	Incheon, KR (ICN)	255,867	27.7%
Guangzhou, CN (CAN)	16,075	-23.6%	Denver CO, US (DEN)	1,414,643	-45.6%	Taipei, CN (TPE)	222,502	33.7%
Los Angeles CA, US (LAX)	15,729	-43.6%	Shenzhen, CN (SZX)	1,397,300	-33.7%	Louisville KY, US (SDF)	212,893	0.0%
Phoenix AZ, US (DVT)	14,355	-32.6%	Kunming, CN (KMG)	1,306,502	-28.2%	Doha, QA (DOH)	201,250	14.2%
New Delhi, IN (DEL)	14,044	-32.3%	Shanghai, CN (SHA)	1,154,099	-29.1%	Los Angeles CA, US (LAX)	193,063	32.6%
Phoenix AZ, US (PHX)	13,884	-29.2%	São Paulo, BR (GRU)	1,143,387	-46.2%	Tokyo, JP (NRT)	192,395	31.2%
Shenzhen, CN (SZX)	13,427	-15.6%	Charlotte NC, US (CLT)	1,065,513	-49.1%	Miami FL, US (MIA)	186,198	6.5%
Shanghai, CN (PVG)	13,043	-39.1%	Mexico City, MX (MEX)	1,037,921	-50.7%	Dubai, AE (DXB)	175,621	-7.5%
Salt Lake City UT, US (SLC)	12,937	-12.3%	Dubai, AE (DXB)	1,023,001	-74.6%	Frankfurt, DE (FRA)	169,067	21.2%
Miami FL, US (MIA)	12,759	-33.1%	Hangzhou, CN (HGH)	1,010,737	-29.4%	Guangzhou, CN (CAN)	163,123	19.5%
Chengdu, CN (CTU)	12,669	-19.4%	Chicago IL, US (ORD)	986,062	-66.5%	Chicago IL, US (ORD)	159,025	35.9%

Note: Total scheduled and non-scheduled services

(Source: ACI)

In terms of aircraft departures, the Top 15 airports reported a combined fall of -30.4% YoY. US airports continued to be at top of the chart followed by Chinese airports. Atlanta retained the 1st position with -30.9% decline, followed by Dallas/Fort Worth (-18.5%). Salt Lake City reported the smallest fall at -12.3%, followed by Shenzhen (-15.6%).

In terms of passengers, the Top 15 airports posted a total fall of -49.2% YoY. While Chinese and US airports continued to dominant Top15, few airports from Latin America/Caribbean and the Middle East also appeared in the list. Atlanta overtook Guangzhou became 1st, albeit with the third largest YoY decline. The smallest contraction was posted by Kunming (-28.2%) and Shanghai (-29.1%).

In terms of freight, the Top 15 airports reported a YoY increase of +21.0%. Unlike passenger traffic, air freight rose sharply with all Top 15 recording YoY growth, except for Dubai which posted a decline of -7.5%. Hong Kong retained the 1st position with a solid increase of +15.8%. The strongest contraction was recorded by Anchorage at +49.8%.

### TOP 15 AIRLINE GROUPS (Ranked by RPK)

JAN 2021: -67.7% YoY in terms of RPK for the Top 15

In terms of RPK, the Top 15 airline groups accounted for 52.3% of the world's total RPK in January 2021 and declined by -67.7% YoY. This decline was 4.8 percentage points smaller than the fall in world's average RPK, with all airlines in the Top 15 posting contractions.

Airlines in the two largest domestic markets, US and China, continued to lead the recovery chart. However, their rankings changed significantly being hampered by virus resurgence at varying degrees.

For the first time since April 2020, the three major US airlines overtook Chinese airlines and became Top 3. This was mainly due to the sudden traffic fall in China. American ranked 1st with a similar decline as in December, followed by Delta and United. Southwest dropped one position to 8th.

All the three major Chinese airlines, China Southern, China Eastern, and Air China, posted noticeable deterioration in traffic as domestic travel was strictly controlled in response to the new outbreaks. Compared to December, traffic of China Southern was down 40% from 15.6 billion to 9.3 billion RPKs, and the latter two showed approximately 30% less traffic.

Airlines in Europe maintained the similar decline as in the previous month. While AF-KLM climbed up one position to 7th, recovery of Lufthansa and IAG slowed down and recorded the second and third largest YoY decline among the Top 15.

Traffic of both Emirates and LATAM trended sideways slightly, and ranked 11th and 14th, respectively.

JAN 21

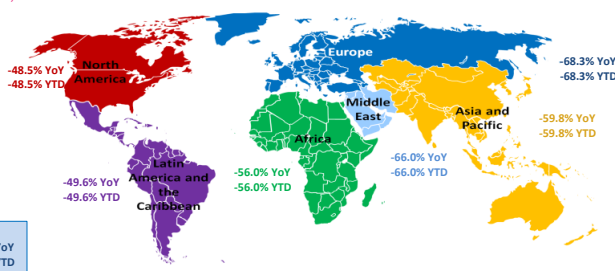
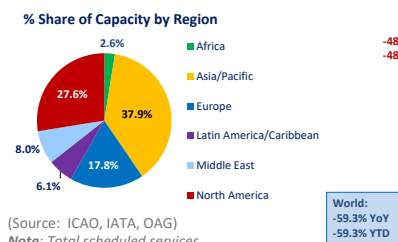
	RPK (billion)	YoY	% Share of World Total	Cumulative % Share
American	10.3	-64.7%	5.6%	5.6%
Delta	9.7	-65.8%	5.3%	10.8%
United	9.4	-66.7%	5.1%	16.0%
China Southern	9.3	-59.1%	5.0%	21.0%
China Eastern	7.1	-60.6%	3.9%	24.9%
Air China	7.1	-62.5%	3.8%	28.7%
AF-KLM	7.0	-69.1%	3.8%	32.6%
Southwest	6.1	-61.0%	3.3%	35.9%
Hainan Airlines	5.1	-42.0%	2.8%	38.6%
Aeroflot	4.9	-56.0%	2.7%	41.3%
Emirates	4.3	-84.0%	2.3%	43.6%
IAG	4.2	-80.2%	2.3%	45.9%
Turkish Airlines	4.1	-67.5%	2.2%	48.1%
LATAM Airlines Group	3.8	-67.2%	2.1%	50.2%
Lufthansa Group	3.8	-82.5%	2.1%	52.3%
Top 15 Total RPKs	96 billion	-67.7%	52.3%	
World Total RPKs	184 billion	-72.5%	100.0%	

(Source: ICAO, airlines' websites)

Note: Total scheduled and non-scheduled services

### CAPACITY BY REGION (ICAO Statistical Regions)

JAN 2021: -59.3% YoY in terms of World ASK



Worldwide capacity contracted by -59.3% YoY in January 2021. All regions registered smaller capacity than in December, except for marginal increases in the Middle East and Latin America/Caribbean. The most noticeable decrease was seen in Asia/Pacific, affected by the new outbreaks.

Capacity in North America recovered the fastest, whereas Europe posted the largest capacity decline among all regions.

\* Embarked Passengers \*\* Loaded and Unloaded Freight in Tonnes 1. ICAO estimates

ACRONYMS: ACI: Airports Council International; ASK: Available Seat-Kilometres; IATA: International Air Transport Association; FTK: Freight Tonne-Kilometres; LF: Passenger Load Factor; OAG: Official Airline Guide; RPK: Revenue Passenger-Kilometres; UNWTO: World Tourism Organization; YoY: Year-on-year; YTD: Year-to-date.



ICAO

# ECONOMIC DEVELOPMENT

## FEB 2021: Air Transport Monthly Monitor

World Results and Analyses. Total scheduled services  
(Domestic and international)

Air Transport Bureau  
E-mail: [ecd@icao.int](mailto:ecd@icao.int)

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

### GLOBAL KEY FIGURES

**FEB 2021**  
(versus FEB 2019)

RPK ▼ -74.7% ASK ▼ -63.1% FTK ▲ +9.0% LF: 55.4% ▼ -25.2 pt

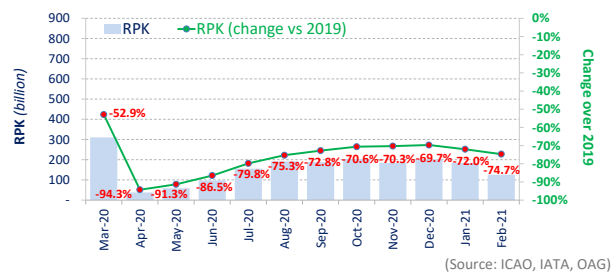
**OUTLOOK\* - MAR 2021**  
(versus MAR 2019)

ASK ▼ -56.2% \* Source OAG

### PASSENGER TRAFFIC

#### Revenue Passenger-Kilometres - RPK

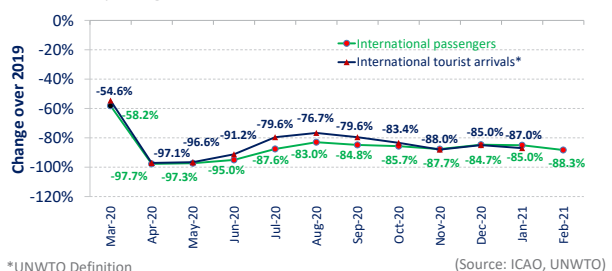
World passenger traffic fell by -74.7% in February 2021 (compared to 2019), -2.7 percentage points lower than the decline in the previous month. Surging new COVID-19 cases along with stringent travel restrictions have caused further deterioration in both international and domestic traffic. All regions contributed to the global weakness, with Asia/Pacific and Europe recording the largest slowdown. While improvements were observed in domestic Australia and US, most major domestic markets trended downward, particularly domestic China which marked a slump.



#### International Passengers vs. Tourist Arrivals

International passenger numbers fell by -88.3% in February 2021 (compared to 2019), -3.3 percentage points down from the decline in the previous month. Travel restrictions remained strict, and international traffic worsened for all regions, particularly Europe and Latin America/Caribbean.

The international tourist arrivals also remained stagnant and followed a similar trend as international passenger traffic.

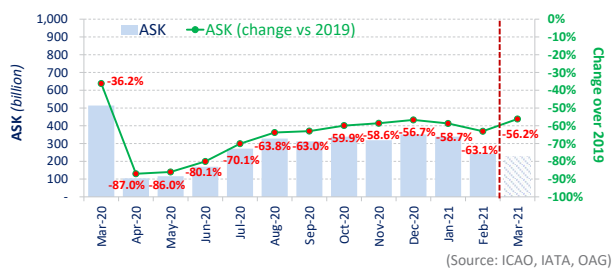


### CAPACITY

#### Available Seat-Kilometres - ASK

Capacity worldwide fell by -63.1% in February 2021 (compared to 2019), -4.4 percentage points down from the decline in the previous month (-58.7%).

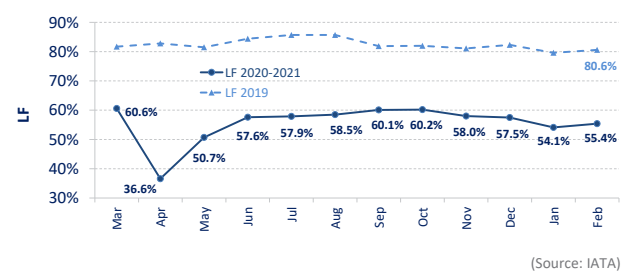
With signs of easing pressure on domestic travel, capacity is likely to be restored in March 2021 reaching a fall of -56.2% from the 2019 level.



#### Load Factor - LF

The passenger Load Factor reached 55.4% in February 2021, +1.3 percentage points higher than the previous month.

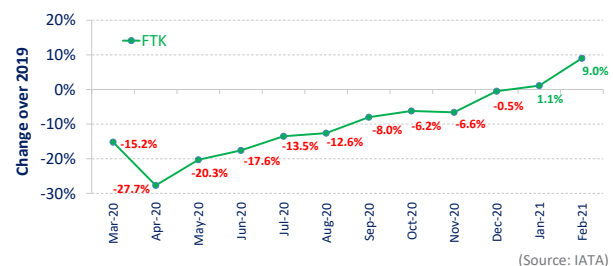
As air travel demand fell faster than capacity, the February LF was -25.2 percentage points lower than the rate in the same period of 2019.



### FREIGHT TRAFFIC

#### Freight Tonne-Kilometres - FTK

World freight traffic reported a growth of +9.0% in February 2021 (compared to 2019), +7.9 percentage points up from the growth in the previous month. In contrast to passenger traffic, freight traffic continued to rise sharply, despite the intensified pandemic situation. Air cargo demand remained strong, supported by the robust developments in manufacturing and goods trade during the global economic recovery. All regions, except for Latin America/Caribbean, showed expansion in freight traffic. Africa recorded the fastest growth and topped the growth chart, followed by North America, which also expanded double-digitally. Latin America/Caribbean continued to lag behind other regions, and was the only region with decline from 2019 level.



**ACRONYMS:** ACT: Airports Council International; ASK: Available Seat-Kilometres; IATA: International Air Transport Association; FTK: Freight Tonne-Kilometres; LF: Passenger Load Factor; OAG: Official Airline Guide; RPK: Revenue Passenger-Kilometres; UNWTO: World Tourism Organization; YoY: Year-on-year; YTD: Year-to-date.



► CONTINUED FROM PAGE 58



ICAO

## ECONOMIC DEVELOPMENT

## FEB 2021: Air Transport Monthly Monitor

World Results and Analyses. Total scheduled services  
(Domestic and international)

## TOP 15 AIRPORTS (Ranked by aircraft departures, passengers and volume of freight)

FEB 2021: -28.0%, -52.3%, and +19.6% (vs. 2019) in terms of aircraft departures, passengers and freight for the Top 15

FEB 21

Airports (ranking by number of departures)	Departures	YoY	Airports (ranking by number of passengers)	Passengers*	YoY	Airports (ranking by tonnes of freight)	Freight**	YoY
Atlanta GA, US (ATL)	22,769	↓ -30.7%	New Delhi, IN (DEL)	1,609,556	↓ -40.1%	Hong Kong SAR, CN (HKG)	307,000	↑ 14.0%
Chicago IL, US (ORD)	18,526	↓ -42.1%	Atlanta GA, US (ATL)	1,602,847	↓ -58.0%	Memphis TN, US (MEM)	288,967	↓ -14.9%
Dallas/Fort Worth TX, US (DFW)	18,396	↓ -27.4%	Denver CO, US (DEN)	1,397,648	↓ -39.1%	Shanghai, CN (PVG)	286,468	↑ 48.6%
Denver CO, US (DEN)	17,119	↓ -21.2%	Chengdu, CN (CTU)	1,310,361	↓ -44.5%	Incheon, KR (ICN)	233,383	↑ 32.3%
Charlotte NC, US (CLT)	15,425	↓ -28.6%	Dallas/Fort Worth TX, US (DFW)	1,264,576	↓ -50.8%	Anchorage AK, US (ANC)	230,647	↑ 45.6%
Phoenix AZ, US (DVT)	13,884	↓ -18.8%	Guangzhou, CN (CAN)	1,157,227	↓ -60.7%	Doha, QA (DOH)	198,862	↑ 29.0%
Los Angeles CA, US (LAX)	13,781	↓ -45.9%	Shenzhen, CN (SZX)	1,090,257	↓ -50.4%	Louisville KY, US (SDF)	194,454	↑ 11.0%
New Delhi, IN (DEL)	13,647	↓ -23.9%	Charlotte NC, US (CLT)	1,059,983	↓ -41.3%	Taipei, CN (TPE)	192,617	↑ 54.2%
Phoenix AZ, US (PHX)	12,649	↓ -25.8%	Kunming, CN (KMG)	1,012,342	↓ -51.0%	Chicago IL, US (ORD)	187,443	↑ 62.2%
Long Beach CA, US (LGB)	12,271	↑ 5.0%	Chicago IL, US (ORD)	995,419	↓ -63.3%	Tokyo, JP (NRT)	187,149	↑ 32.0%
Miami FL, US (MIA)	12,039	↓ -31.9%	Orlando FL, US (MCO)	994,378	↓ -49.4%	Los Angeles CA, US (LAX)	181,665	↑ 33.7%
Guangzhou, CN (CAN)	11,858	↓ -37.5%	Phoenix AZ, US (PHX)	896,292	↓ -49.5%	Miami FL, US (MIA)	179,964	↑ 11.6%
Salt Lake City UT, US (SLC)	11,845	↓ -7.5%	Mumbai, IN (BOM)	890,047	↓ -51.9%	Frankfurt, DE (FRA)	173,906	↑ 14.3%
Seattle WA, US (SEA)	11,441	↓ -23.8%	Jeju, KR (CJU)	870,140	↓ -24.8%	Dubai, AE (DXB)	168,086	↓ -14.0%
Daytona Beach FL, US (DAB)	11,403	↓ -19.8%	Dubai, AE (DXB)	835,172	↓ -75.6%	Paris, FR (CDG)	147,000	↓ -0.9%

Note: Total scheduled and non-scheduled services

(Source: ACI)

In terms of aircraft departures, the Top 15 airports reported a combined fall of -28.0%, compared to 2019. Unlike previous months, the Top 15 was dominated by mostly US airports with two airports in Asia/Pacific. Atlanta retained the 1st position with -30.7% decline. Long Beach was the only Top 15 airport recording positive increase of +5.0%.

In terms of passengers, the Top 15 airports posted a total fall of -52.3%, compared to 2019. Rankings changed significantly in February. In addition to the US and Chinese, a few airports in Asia/Pacific and Middle East also appeared in the list. For the first time, New Delhi became 1st, albeit with a large YoY decline. The smallest fall was posted by Jeju (-24.8%) and Denver (-39.1%).

In terms of freight, the Top 15 airports reported a YoY increase of +19.6%, compared to 2019. Freight traffic continued to expand strongly. All Top 15 recording YoY growth, except for Memphis (-14.9%), Dubai (-14.0%) and Paris (-0.9%). Hong Kong retained the 1st position, while the largest expansion was recorded by Chicago at +62.2%.

## TOP 15 AIRLINE GROUPS (Ranked by RPK)

FEB 2021: -70.2% (vs. 2019) in terms of RPK for the Top 15

FEB 21

In terms of RPK, the Top 15 airline groups accounted for 62.9% of the world's total RPK in February 2021 and declined by -70.2% compared to 2019. This decline was 4.5 percentage points smaller than the fall in world's average RPK, with all airlines in the Top 15 posting contractions.

February marked another month of deterioration in both international and domestic traffic. All airlines in the Top 15 recorded smaller RPKs compared to January, especially the Chinese airlines, due to the abrupt fall in domestic traffic.

For the second consecutive month, the three major US airlines maintained the Top 3 positions.

American ranked 1st, followed by Delta and United. Southwest improved one position to 7th. In average, all the US airlines in the Top 15 have recovered to around 35% of 2019 traffic levels.

The Chinese airlines in the Top 15, China Southern, China Eastern, Air China, and Hainan Airlines, posted sharp declines in traffic, driven by the limited travel during the Chinese New Year period. Compared to January, the Chinese airlines recorded 16-25% lower traffic. While the former three kept the same positions, the latter dropped one position to 10th.

Airlines in Europe further trended downward. AF-KLM went down to 8th, while Aeroflot and Turkish Airlines climbed up to 9th and 11th. Lufthansa ranked 15th and recorded the second largest fall.

Both Emirates and LATAM posted deeper decline and ranked 13th and 14th, respectively.

	RPK (billion)	Change over 2019	% Share of World Total	Cumulative % Share
American	9.8	↓ -61.7%	7.8%	7.8%
Delta	8.5	↓ -65.2%	6.7%	14.5%
United	7.9	↓ -68.1%	6.3%	20.8%
China Southern	7.8	↓ -65.4%	6.2%	27.0%
China Eastern	5.4	↓ -70.0%	4.3%	31.3%
Air China	5.3	↓ -71.7%	4.2%	35.5%
Southwest	5.3	↓ -65.0%	4.2%	39.7%
AF-KLM	5.2	↓ -74.1%	4.1%	43.8%
Aeroflot	4.6	↓ -55.3%	3.7%	47.5%
Hainan Airlines	3.9	↓ -68.8%	3.1%	50.6%
Turkish Airlines	3.7	↓ -64.9%	2.9%	53.5%
Qatar Airways	3.4	↓ -72.3%	2.7%	56.2%
Emirates	3.0	↓ -86.4%	2.4%	58.6%
LATAM Airlines Group	2.8	↓ -72.7%	2.2%	60.8%
Lufthansa Group	2.6	↓ -86.0%	2.1%	62.9%
Top 15 Total RPKs	79 billion	↓ -70.2%	62.9%	
World Total RPKs	126 billion	↓ -74.7%	100.0%	

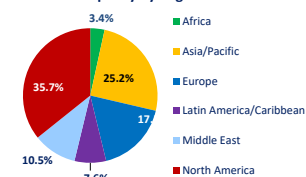
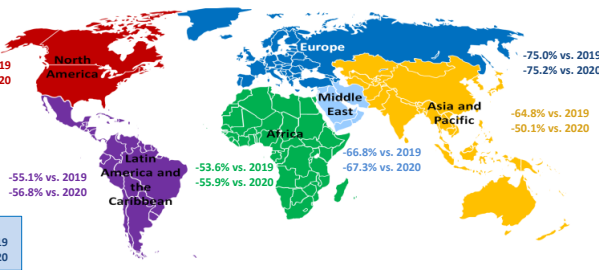
(Source: ICAO, airlines' websites)

Note: Total scheduled and non-scheduled services

## CAPACITY BY REGION (ICAO Statistical Regions)

FEB 2021: -63.1% (vs. 2019) in terms of World ASK

## % Share of Capacity by Region

(Source: ICAO, IATA, OAG)  
Note: Total scheduled services

Worldwide capacity contracted by -63.1% in February 2021, compared to 2019. Capacity offered in all regions was reduced, except for small increases in North America and Africa where travel restrictions eased slightly.

Europe continued to see the largest capacity decrease, followed by Asia/Pacific, mainly attributed to the fall in domestic China.

\* Embarked Passengers \*\* Loaded and Unloaded Freight in Tonnes 1. ICAO estimates

ACRONYMS: ACI: Airports Council International; ASK: Available Seat-Kilometres; IATA: International Air Transport Association; FTK: Freight Tonne-Kilometres; LF: Passenger Load Factor; OAG: Official Airline Guide; RPK: Revenue Passenger-Kilometres; UNWTO: World Tourism Organization; YoY: Year-on-year; YTD: Year-to-date.



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# ECONOMIC DEVELOPMENT

## MAR 2021: Air Transport Monthly Monitor

World Results and Analyses. Total scheduled services  
(Domestic and international)

Air Transport Bureau  
E-mail: [ecd@icao.int](mailto:ecd@icao.int)

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

### GLOBAL KEY FIGURES

**MAR 2021**  
(versus MAR 2019)

RPK ▼ -67.2% ASK ▼ -56.8% FTK ▲ +4.4% LF: 62.3% ▼ -19.7 pt

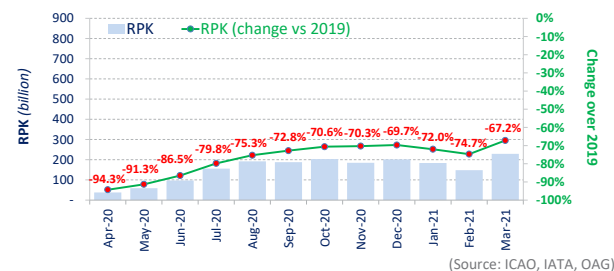
**OUTLOOK\* - APR 2021**  
(versus APR 2019)

ASK ▼ -54.4% \* Source OAG

### PASSENGER TRAFFIC

#### Revenue Passenger-Kilometres - RPK

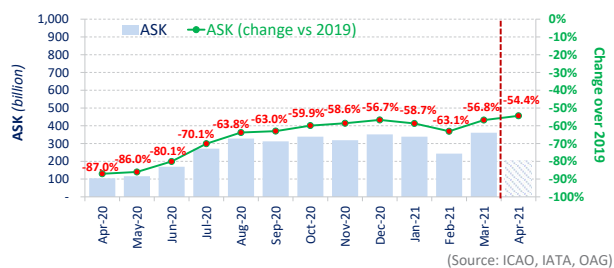
World passenger traffic fell by -67.2% in March 2021 (compared to 2019), +7.5 percentage points up from the decline in the previous month. After two consecutive months of deterioration, passenger traffic picked up, driven by the rebound in domestic demand, particularly in China where lockdowns and travel restrictions have eased. The pace of recovery diverged across regions. Whereas Africa and Latin America/Caribbean slowed down, the other regions showed improvements, especially in Asia/Pacific and North America.



### CAPACITY

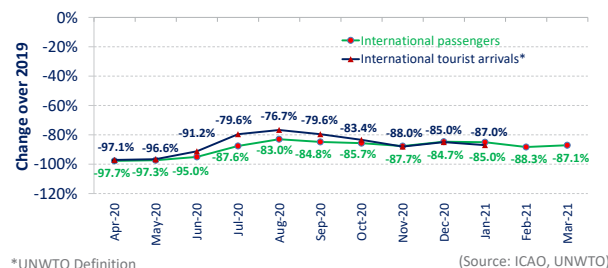
#### Available Seat-Kilometres - ASK

Capacity worldwide fell by -56.8% in March 2021 (compared to 2019), +6.3 percentage points up from the decline in the previous month (-63.1%). With progress in vaccine rollout, capacity is expected to increase in April 2021 to -54.4% down from the 2019 level.



#### International Passengers vs. Tourist Arrivals

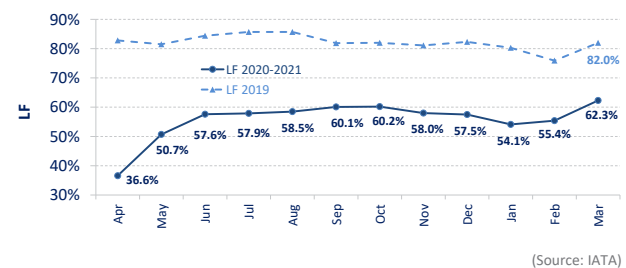
International passenger numbers fell by -87.1% in March 2021 (compared to 2019), +1.2 percentage points up from the decline in the previous month. International travel measures remained strict across all regions amid the emergence of new variants. Asia/Pacific was the slowest recovering region at merely 5% of 2019 traffic levels. The international tourist arrivals also remained stagnant and followed a similar trend as international passenger traffic.



\* UNWTO Definition

#### Load Factor - LF

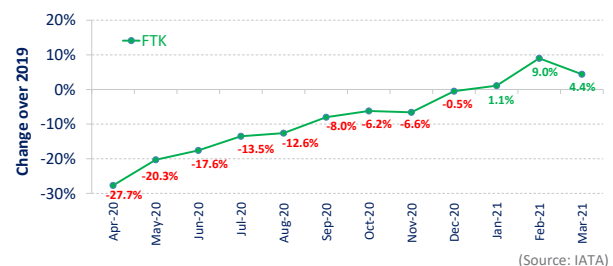
The passenger Load Factor reached 62.3% in March 2021, +6.9 percentage points higher than the previous month. Asia/Pacific and North America were the main contributors to the load factor improvements. As air travel demand fell faster than capacity, the March LF was -19.7 percentage points lower than the rate in the same period of 2019.



### FREIGHT TRAFFIC

#### Freight Tonne-Kilometres - FTK

World freight traffic reported a growth of +4.4% in March 2021 (compared to 2019), -4.6 percentage points lower than the growth in the previous month. Albeit with a softened growth rate, air cargo demand remained strong, supported by the gradual rebound in global economic activity and increase in export. All regions, except for the Middle East and North America, showed a moderation in freight traffic expansion, with noticeable slowdown in Africa and Asia/Pacific. Nevertheless, Africa still grew rose double-digitally and topped the growth chart, followed by North America. Asia/Pacific and Latin America/Caribbean were the only regions posting contractions from 2019 levels, with the latter recording the weakest performance.



**ACRONYMS:** ACI: Airports Council International; ASK: Available Seat-Kilometres; IATA: International Air Transport Association; FTK: Freight Tonne-Kilometres; LF: Passenger Load Factor; OAG: Official Airline Guide; RPK: Revenue Passenger-Kilometres; UNWTO: World Tourism Organization; YoY: Year-on-year; YTD: Year-to-date.



ICAO

# ECONOMIC DEVELOPMENT

## MAR 2021: Air Transport Monthly Monitor

World Results and Analyses. Total scheduled services  
(Domestic and international)

### TOP 15 AIRPORTS (Ranked by aircraft departures, passengers and volume of freight)

MAR 2021: -19.6%, -31.0%, and +14.1% (vs. 2019) in terms of aircraft departures, passengers and freight for the Top 15

MAR 21

Airports (ranking by number of departures)	Departures	vs. 2019	Airports (ranking by number of passengers)	Passengers*	vs. 2019	Airports (ranking by tonnes of freight)	Freight**	vs. 2019
Atlanta GA, US (ATL)	29,273	↓ -25.0%	Guangzhou, CN (CAN)	2,535,629	↓ -18.0%	Memphis TN, US (MEM)	397,589	↑ 3.2%
Dallas/Fort Worth TX, US (DFW)	26,852	↓ -8.1%	Atlanta GA, US (ATL)	2,309,590	↓ -52.0%	Hong Kong SAR, CN (HKG)	394,000	↓ -6.7%
Charlotte NC, US (CLT)	21,665	↓ -12.5%	Chengdu, CN (CTU)	2,280,367	↓ -0.2%	Shanghai, CN (PVG)	377,119	↑ 22.2%
Denver CO, US (DEN)	21,024	↓ -15.3%	Dallas/Fort Worth TX, US (DFW)	2,253,152	↓ -26.2%	Anchorage AK, US (ANC)	304,891	↑ 26.1%
Chicago IL, US (ORD)	20,413	↓ -46.5%	Shenzhen, CN (SZX)	2,059,731	↓ -6.2%	Incheon, KR (ICN)	282,428	↑ 17.9%
Guangzhou, CN (CAN)	19,889	↓ -3.6%	Denver CO, US (DEN)	1,959,727	↓ -28.1%	Taipei, CN (TPE)	247,769	↑ 32.2%
Shanghai, CN (PVG)	17,813	↓ -17.3%	Chongqing, CN (CKG)	1,819,343	n.a	Louisville KY, US (SDF)	241,465	↑ 18.5%
Los Angeles CA, US (LAX)	17,399	↓ -40.7%	Beijing, CN (PEK)	1,754,016	↓ -57.1%	Tokyo, JP (NRT)	234,129	↑ 26.0%
Phoenix AZ, US (PHX)	17,182	↓ -15.3%	Shanghai, CN (SHA)	1,747,122	↓ -7.2%	Chicago IL, US (ORD)	234,043	↑ 53.4%
Chengdu, CN (CTU)	16,241	↑ 5.3%	Shanghai, CN (PVG)	1,741,696	↓ -45.3%	Doha, QA (DOH)	232,193	↑ 21.4%
Shenzhen, CN (SZX)	15,884	↑ 2.7%	New Delhi, IN (DEL)	1,706,335	↓ -37.7%	Los Angeles CA, US (LAX)	230,439	↑ 28.8%
New Delhi, IN (DEL)	15,454	↓ -18.0%	Charlotte NC, US (CLT)	1,613,374	↓ -25.4%	Miami FL, US (MIA)	211,027	↑ 20.1%
Miami FL, US (MIA)	15,423	↓ -18.5%	Hangzhou, CN (HGH)	1,567,558	↓ -5.4%	Dubai, AE (DXB)	207,104	↓ -11.2%
Beijing, CN (PEK)	15,338	↓ -37.8%	Orlando FL, US (MCO)	1,564,126	↓ -34.5%	Frankfurt, DE (FRA)	200,751	↑ 5.2%
Long Beach CA, US (LGB)	14,877	↑ 14.3%	Phoenix AZ, US (PHX)	1,501,339	↓ -33.6%	Paris, FR (CDG)	165,540	↓ -5.6%

Note: Total scheduled and non-scheduled services

(Source: ACI)

In terms of **aircraft departures**, the Top 15 airports reported a combined fall of -19.6%, compared to 2019. A few airports posted positive growth, particularly **Long Beach** which increased double-digitally. Two Chinese airports, **Chengdu** and **Shenzhen** also rose +5.3% and +2.7%, respectively. **Atlanta** retained the 1st position with a decline of -25.0%.

In terms of **passengers**, the Top 15 airports posted a total fall of -31.0%, compared to 2019. Passenger traffic remained below 2019 levels for all Top 15 airports. Nevertheless, some Chinese airports showed faster recovery with **Chengdu** posting the smallest contraction at -0.2%. **Guangzhou** regained the 1st position with -18.0% decline, followed by **Atlanta**, albeit with a larger fall at -52.0%.

In terms of **freight**, the Top 15 airports reported an increase of +14.1%, compared to 2019. All Top 15 ticked up, except for **Hong Kong** (-6.7%), **Dubai** (-11.2%) and **Paris** (-5.6%). With a modest growth of +3.2%, **Memphis** overtook Hong Kong and became 1st. **Chicago** continued to record the largest increase at +53.4%.

### TOP 15 AIRLINE GROUPS (Ranked by RPK)

MAR 2021: -57.9% (vs. 2019) in terms of RPK for the Top 15

In terms of RPK, the Top 15 airline groups accounted for 55.2% of the world's total RPK in March 2021 and declined by -57.9% compared to 2019. This decline was 9.3 percentage points smaller than the fall in world's average RPK.

For the first time since April 2020, a positive growth from the pre-COVID-19 levels emerged among Top 15 airlines. Airlines in countries with large domestic markets continued to lead the growth chart.

Following two consecutive months of deterioration, the Chinese airlines rebounded sharply. **China Southern** surpassed **American** and ranked 1st. **China Eastern**, **Air China** and **Hainan Airlines** improved to 3rd, 4th, and 8th, respectively. All Chinese airlines recorded faster recovery compared to other airlines in the Top 15, with **Spring Airlines** being the only airline exceeding 2019 levels.

All US airlines posted improvements supported by rapid vaccination progress. **American** ranked 2nd, outpacing other US airlines in the Top 15. **Delta** and **United** moved down to 5th and 6th, while **Southwest** maintained the 7th position.

Airlines in Europe continued to show slower recovery. **Lufthansa** and **KLM** posted the second and third largest contraction and remained at over 70% and 80% below 2019 levels, respectively. **Aeroflot** and **Turkish Airlines** showed slightly better performance at 50-60% down from 2019.

Two airlines in the Middle East, **Qatar** and **Emirates** ranked 12th and 14th, respectively, while the latter posted the largest decline from 2019.

MAR 21

	RPK (billion)	Change over 2019	% Share of World Total	Cumulative % Share
China Southern	17.3	↓ -24.1%	7.6%	7.6%
American <sup>1</sup>	15.7	↓ -51.0%	6.9%	14.4%
China Eastern	11.9	↓ -33.3%	5.2%	19.6%
Air China	11.6	↓ -39.5%	5.1%	24.7%
Delta <sup>1</sup>	10.9	↓ -66.0%	4.8%	29.5%
United <sup>1</sup>	10.4	↓ -68.2%	4.6%	34.0%
Southwest <sup>1</sup>	9.4	↓ -50.9%	4.1%	38.1%
Hainan Airlines	6.7	↓ -45.0%	2.9%	41.0%
AF-KLM <sup>1</sup>	6.6	↓ -71.4%	2.9%	43.9%
Aeroflot <sup>1</sup>	5.8	↓ -52.2%	2.5%	46.4%
Turkish Airlines	4.9	↓ -59.2%	2.1%	48.6%
Qatar Airways	4.3	↓ -69.1%	1.9%	50.4%
Lufthansa Group <sup>1</sup>	3.7	↓ -83.8%	1.6%	52.1%
Emirates	3.7	↓ -84.9%	1.6%	53.7%
Spring Airlines	3.3	↑ 5.3%	1.5%	55.2%
Top 15 Total RPKs	126 billion	↓ -57.9%	55.2%	
World Total RPKs	229 billion	↓ -67.2%	100.0%	

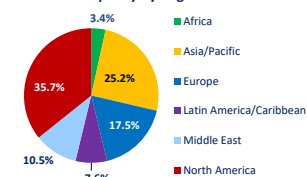
(Source: ICAO, airlines' websites)

Note: Total scheduled and non-scheduled services

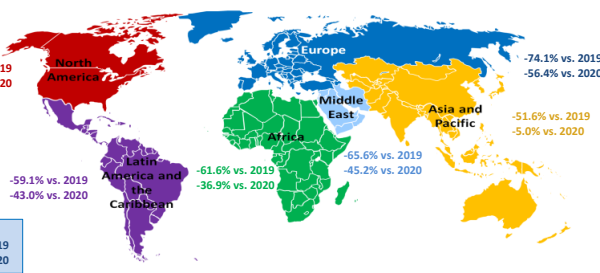
### CAPACITY BY REGION (ICAO Statistical Regions)

MAR 2021: -56.8% (vs. 2019) in terms of World ASK

% Share of Capacity by Region



(Source: ICAO, IATA, OAG)  
Note: Total scheduled services



Worldwide capacity contracted by -56.8% in March 2021, compared to 2019. All regions, except for Africa and Latin America/Caribbean, saw smaller declines in capacity compared to the previous month.

The most noticeable increase was recorded in Asia/Pacific, owing to the rebound of China domestic demand. Capacity offered in Europe continued to be far below 2019 levels.

\* Embarked Passengers \*\* Loaded and Unloaded Freight in Tonnes 1. ICAO estimates

ACRONYMS: ACI: Airports Council International; ASK: Available Seat-Kilometres; IATA: International Air Transport Association; FTK: Freight Tonne-Kilometres; LF: Passenger Load Factor; OAG: Official Airline Guide; RPK: Revenue Passenger-Kilometres; UNWTO: World Tourism Organization; YoY: Year-on-year; YTD: Year-to-date.





ICAO

# ECONOMIC DEVELOPMENT

## APR 2021: Air Transport Monthly Monitor

World Results and Analyses. Total scheduled services  
(Domestic and international)

Air Transport Bureau  
E-mail: [ecd@icao.int](mailto:ecd@icao.int)

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

### GLOBAL KEY FIGURES

APR 2021  
(versus APR 2019)

RPK ▼ -65.4% ASK ▼ -54.5% FTK ▲ +12.0% LF: 63.3% ▼ -19.5 pt

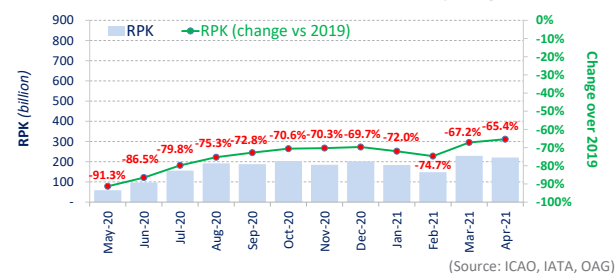
OUTLOOK\* - MAY 2021  
(versus MAY 2019)

ASK ▼ -52.1% \* Source OAG

### PASSENGER TRAFFIC

#### Revenue Passenger-Kilometres - RPK

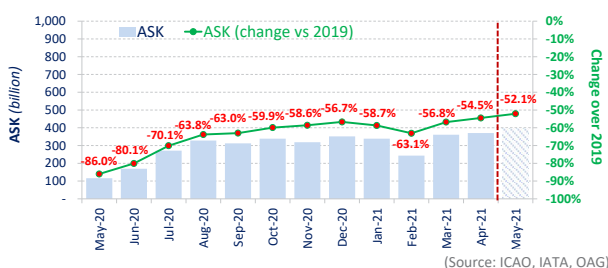
World passenger traffic fell by -65.4% in April 2021 (compared to 2019), +1.8 percentage points up from the decline in the previous month. Recovery in air travel continued alongside the decline in new COVID-19 cases at the global level. Nevertheless, wide disparities exist between regions as a result of the varying pandemic situation and travel restrictions, particularly the emergence of new variants in certain parts of the world. Domestic travel remained the driving force for recovery with both domestic traffic of China and Russia Federation surpassing the 2019 levels.



### CAPACITY

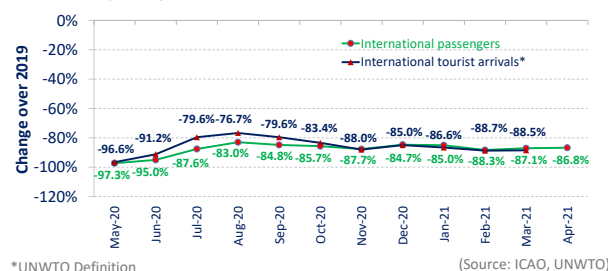
#### Available Seat-Kilometres - ASK

Capacity worldwide fell by -54.5% in April 2021 (compared to 2019), +2.3 percentage points up from the decline in the previous month (-56.8%). With the ongoing improvements, capacity is expected to increase in May 2021 to -52.1% down from the 2019 level.



#### International Passengers vs. Tourist Arrivals

International passenger numbers fell by -86.8% in April 2021 (compared to 2019), +0.3 percentage point up from the decline in the previous month. International travel remained unchanged with strict border restrictions due to the concern of surging new variants. Asia/Pacific and Europe were the slowest recovering regions. The international tourist arrivals also remained stagnant and followed a similar trend as international passenger traffic.

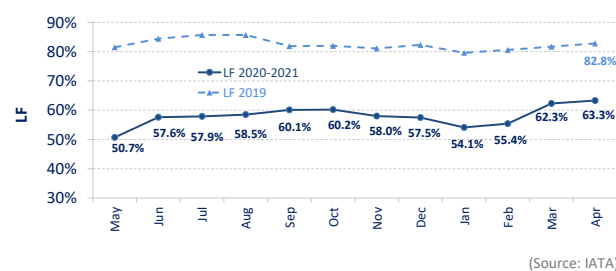


\* UNWTO Definition

#### Load Factor - LF

The passenger Load Factor reached 63.3% in April 2021, +1.0 percentage point higher than the previous month. Domestic load factor picked up notably and reached above 70%.

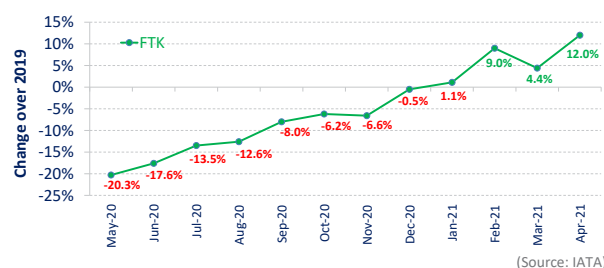
As air travel demand fell faster than capacity, the April LF was -19.5 percentage points lower than the rate in the same period of 2019.



### FREIGHT TRAFFIC

#### Freight Tonne-Kilometres - FTK

World freight traffic reported a growth of +12.0% in April 2021 (compared to 2019), +7.6 percentage points higher than the growth in the previous month. After one month of moderation, freight traffic rose sharply with double-digit growth. Several factors have been contributing to the strong air cargo demand such as the strengthening in global economic activity, trade, and rise in consumer spending including e-commerce. All regions showed improvements in freight traffic, except for Latin America/Caribbean which was the only region remained below 2019 levels and further deteriorated in April. Africa and North America continued to lead the growth chart, expanding at over +30% and +20%, respectively.



ACRONYMS: ACI: Airports Council International; ASK: Available Seat-Kilometres; IATA: International Air Transport Association; FTK: Freight Tonne-Kilometres; LF: Passenger Load Factor; OAG: Official Airline Guide; RPK: Revenue Passenger-Kilometres; UNWTO: World Tourism Organization; YoY: Year-on-year; YTD: Year-to-date.

► CONTINUED FROM PAGE 62



ICAO

# ECONOMIC DEVELOPMENT

APR 2021: Air Transport Monthly Monitor

World Results and Analyses. Total scheduled services  
(Domestic and international)

## TOP 15 AIRPORTS (Ranked by aircraft departures, passengers and volume of freight)

APR 2021: -15.2%, -27.7%, and +20.7% (vs. 2019) in terms of aircraft departures, passengers and freight for the Top 15

APR 21

Airports (ranking by number of departures)	Departures	vs. 2019	Airports (ranking by number of passengers)	Passengers*	vs. 2019	Airports (ranking by tonnes of freight)	Freight**	vs. 2019
Atlanta GA, US (ATL)	28,987	↓ -23.4%	Guangzhou, CN (CAN)	2,572,212	↓ -11.5%	Memphis TN, US (MEM)	394,102	↑ 10.0%
Dallas/Fort Worth TX, US (DFW)	25,945	↓ -7.0%	Atlanta GA, US (ATL)	2,459,167	↓ -46.7%	Hong Kong SAR, CN (HKG)	386,000	↑ 0.3%
Chicago IL, US (ORD)	23,124	↓ -37.9%	Dallas/Fort Worth TX, US (DFW)	2,364,643	↓ -21.0%	Shanghai, CN (PVG)	369,348	↑ 28.0%
Charlotte NC, US (CLT)	22,527	↓ -4.5%	Chengdu, CN (CTU)	2,329,002	↑ 4.6%	Anchorage AK, US (ANC)	296,747	↑ 34.7%
Denver CO, US (DEN)	22,233	↓ -10.0%	Denver CO, US (DEN)	2,182,807	↓ -18.0%	Incheon, KR (ICN)	274,906	↑ 25.2%
Guangzhou, CN (CAN)	19,588	↑ 0.5%	Beijing, CN (PEK)	2,061,124	↓ -48.4%	Louisville KY, US (SDF)	240,047	↑ 16.3%
Shanghai, CN (PVG)	18,856	↓ -10.6%	Shenzhen, CN (SZX)	2,055,444	↓ -1.3%	Taipei, CN (TPE)	233,926	↑ 37.3%
Los Angeles CA, US (LAX)	17,912	↓ -37.0%	Shanghai, CN (PVG)	1,994,315	↓ -37.2%	Chicago IL, US (ORD)	229,189	↑ 61.0%
Phoenix AZ, US (PHX)	16,442	↓ -12.5%	Charlotte NC, US (CLT)	1,889,407	↓ -8.9%	Miami FL, US (MIA)	223,015	↑ 22.5%
Miami FL, US (MIA)	15,962	↓ -7.6%	Shanghai, CN (SHA)	1,863,172	↓ -1.3%	Doha, QA (DOH)	222,339	↑ 26.3%
Beijing, CN (PEK)	15,863	↓ -31.6%	Chicago IL, US (ORD)	1,768,126	↓ -48.6%	Los Angeles CA, US (LAX)	218,740	↑ 33.8%
Chengdu, CN (CTU)	15,819	↑ 7.7%	Hangzhou, CN (HGH)	1,669,198	↑ 2.3%	Tokyo, JP (NRT)	217,540	↑ 26.4%
Shenzhen, CN (SZX)	15,568	↑ 6.9%	Orlando FL, US (MCO)	1,637,822	↓ -24.6%	Dubai, AE (DXB)	198,251	↓ -1.4%
Long Beach CA, US (LGB)	15,488	↑ 20.7%	Phoenix AZ, US (PHX)	1,585,007	↓ -20.7%	Frankfurt, DE (FRA)	194,942	↑ 16.3%
Houston TX, US (IAH)	15,109	↓ -23.0%	Los Angeles CA, US (LAX)	1,537,468	↓ -57.5%	Paris, FR (CDG)	173,118	↑ 12.1%

Note: Total scheduled and non-scheduled services

(Source: ACI)

In terms of **aircraft departures**, the Top 15 airports reported a combined fall of **-15.2%**, compared to 2019. The Top 15 list consists of ten US and five Chinese airports. **Atlanta** remained **1st** with a decline of **-23.4%**. **Long Beach** continued to increase double-digitally, followed by **Chengdu** (+7.7%) and **Shenzhen** (+6.9%), respectively.

In terms of **passengers**, the Top 15 airports posted a total fall of **-27.7%**, compared to 2019. Same as departures, only US (8) and Chinese (7) airports ranked within Top 15. **Guangzhou** retained the **1st** position with **-11.5%** decline. Overall, Chinese airports showed smaller contractions with **Chengdu** and **Hangzhou** posting positive growth at **+4.6%** and **+2.3%**, respectively.

In terms of **freight**, the Top 15 airports reported an increase of **+20.7%**, compared to 2019. All Top 15 rose robustly, except for **Dubai** (-1.4%). **Memphis** remained **1st** with a growth of **+10.0%** followed by **Hong Kong** (+0.3%). For the third consecutive month, **Chicago** recorded the strongest increase at **+61.0%**.

## TOP 15 AIRLINE GROUPS (Ranked by RPK)

APR 2021: -54.9% (vs. 2019) in terms of RPK for the Top 15

In terms of RPK, the Top 15 airline groups accounted for 60.9% of the world's total RPK in April 2021 and declined by -54.9% compared to 2019. This decline was 10.5 percentage points smaller than the fall in world's average RPK.

While global passenger traffic improved, the recovery pace remained uneven among regions. Airlines in countries with large domestic markets continued to lead the growth chart.

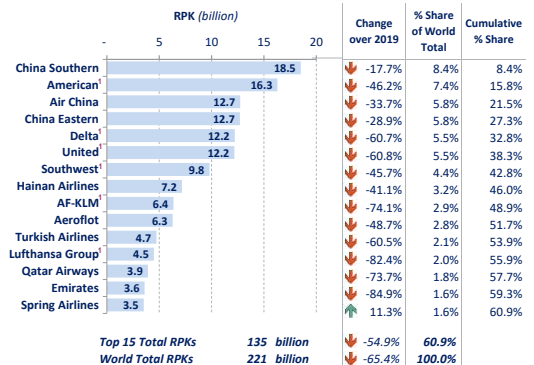
All Chinese airlines recorded faster recovery compared to other airlines in the Top 15. **China Southern** maintained the **1st** position with RPKs at **-17.7%** below 2019 levels. **Air China** overtook **China Eastern** became **3rd**, and **Hainan Airlines** kept the same position. **Spring Airlines** continued to be the only airline posting positive growth and expanded strongly at **+11.3%**.

US airlines demonstrated solid improvements. **American** and **Southwest** showed relatively faster recovery than other US airlines in the Top 15. **American** ranked **2nd** and recovered to over half of the 2019 RPK levels. **Delta**, **United** and **Southwest** stayed at the same positions as in March.

Recovery of airlines in Europe has been weak. **Lufthansa** and **KLM** continued to post the second and third largest contraction from 2019 levels. **Aeroflot** and **Turkish Airlines** showed slightly better performance at **-48.7%** and **-60.5%**, respectively.

Airlines in the Middle East also experienced slow recovery with **Emirates** posting the largest contraction from 2019 levels, at **-84.9%**.

APR 21



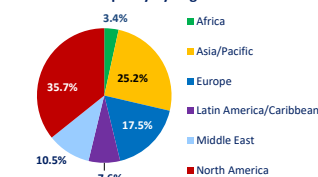
(Source: ICAO, airlines' websites)

Note: Total scheduled and non-scheduled services

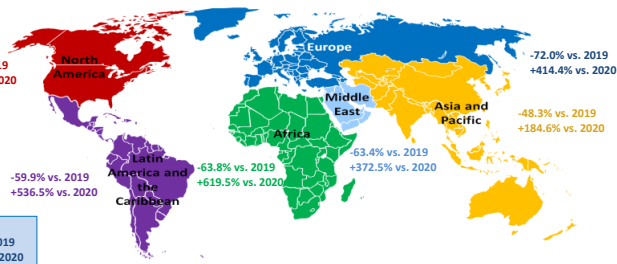
## CAPACITY BY REGION (ICAO Statistical Regions)

APR 2021: -54.5% (vs. 2019) in terms of World ASK

% Share of Capacity by Region



(Source: ICAO, IATA, OAG)  
Note: Total scheduled services



Worldwide capacity contracted by **-54.5%** in April 2021, compared to 2019. All regions saw slight improvements in capacity compared to the previous month, except for Africa and Latin America/Caribbean which experienced larger declines.

Capacity offered in North America and Asia/Pacific showed the smallest decline from 2019 levels, while Europe continued to record the slowest capacity recovery.

\* Embarked Passengers \*\* Loaded and Unloaded Freight in Tonnes 1. ICAO estimates

ACRONYMS: ACI: Airports Council International; ASK: Available Seat-Kilometres; IATA: International Air Transport Association; FTK: Freight Tonne-Kilometres; LF: Passenger Load Factor; OAG: Official Airline Guide; RPK: Revenue Passenger-Kilometres; UNWTO: World Tourism Organization; YoY: Year-on-year; YTD: Year-to-date.

# Worldwide Traffic Results

## COVID-19's Impact on World's Busiest Airports

### Passenger traffic/Freight volumes

(Summary)

PASSENGERS*					
2020	2019	AIRPORT	2020	2019	Percent change
1	11	GUANGZHOU, CN (CAN)	43 767 558	73 394 810	-40.4
2	1	ATLANTA GA, US (ATL)	42 918 685	110 531 300	-61.2
3	24	CHENGDU, CN (CTU)	40 741 509	55 858 552	-27.1
4	10	DALLAS/FORT WORTH TX, US (DFW)	39 364 990	75 066 956	-47.6
5	26	SHENZHEN, CN (SZX)	37 916 054	52 931 925	-28.4
6	48	CHONGQING, CN (CKG)	34 937 789	44 786 722	-22.0
7	2	BEIJING, CN (PEK)	34 513 827	100 013 642	-65.5
8	16	DENVER CO, US (DEN)	33 741 129	69 015 703	-51.1
9	37	KUNMING, CN (KMG)	32 990 805	48 076 238	-31.4
10	46	SHANGHAI, CN (SHA)	31 165 641	45 637 882	-31.7

🔗 Total passengers enplaned and deplaned, passengers in transit counted once

INTL PASSENGERS*					
2020	2019	AIRPORT	2020	2019	Percent change
1	1	DUBAI, AE (DXB)	25 831 363	86 328 896	-70.1
2	3	AMSTERDAM, NL (AMS)	20 880 990	71 679 691	-70.9
3	2	LONDON, GB (LHR)	20 650 473	76 043 973	-72.8
4	6	PARIS, FR (CDG)	19 057 856	69 841 276	-72.7
5	8	FRANKFURT, DE (FRA)	16 837 104	63 067 739	-73.3
6	14	ISTANBUL, TR (IST)	15 945 340	39 580 735	-59.7
7	15	DOHA, QA (DOH)	12 522 288	38 786 566	-67.7
8	5	INCHEON, KR (ICN)	11 955 756	70 578 050	-83.1
9	7	SINGAPORE, SG (SIN)	11 635 000	67 601 000	-82.8
10	11	MADRID, ES (MAD)	11 052 157	44 919 124	-75.4

🔗 International passengers enplaned and deplaned



► CONTINUED FROM PAGE 64



## Worldwide Traffic Results

### COVID-19's Impact on World's Busiest Airports

#### Passenger traffic/Freight volumes

(Summary)

#### CARGO (METRIC TONNES)\*

2020	2019	AIRPORT	2020	2019	Percent change
1	2	MEMPHIS TN, US (MEM)	4 613 431	4 322 740	6.7
2	1	HONG KONG SAR, HK (HKG)	4 468 089	4 809 485	-7.1
3	3	SHANGHAI, CN (PVG)	3 686 627	3 634 230	1.4
4	6	ANCHORAGE AK, US (ANC)	3 157 682	2 745 348	15.0
5	4	LOUISVILLE KY, US (SDF)	2 917 243	2 790 109	4.6
6	5	INCHEON, KR (ICN)	2 822 370	2 764 369	2.1
7	9	CHINESE TAIPEI (TPE)	2 342 714	2 182 342	7.4
8	13	LOS ANGELES CA, US (LAX)	2 229 476	2 092 003	6.6
9	8	DOHA, QA (DOH)	2 175 292	2 215 804	-1.8
10	12	MIAMI FL, US (MIA)	2 137 699	2 092 472	2.2

► Cargo: loaded and unloaded freight and mail in metric tonnes

#### INTL FREIGHT (METRIC TONNES)\*

2020	2019	AIRPORT	2020	2019	Percent change
1	1	HONG KONG SAR, HK (HKG)	4 420 312	4 703 589	-6.0
2	2	SHANGHAI, CN (PVG)	2 952 602	2 825 009	4.5
3	3	INCHEON, KR (ICN)	2 759 467	2 664 005	3.6
4	6	CHINESE TAIPEI (TPE)	2 323 412	2 165 216	7.3
5	10	ANCHORAGE AK, US (ANC)	2 221 804	1 942 554	14.4
6	5	DOHA, QA (DOH)	2 145 076	2 173 371	-1.3
7	7	TOKYO, JP (NRT)	1 958 505	2 039 905	-4.0
8	4	DUBAI, AE (DXB)	1 932 022	2 514 918	-23.2
9	9	FRANKFURT, DE (FRA)	1 818 748	1 961 460	-7.3
10	12	MIAMI FL, US (MIA)	1 730 859	1 706 064	1.5

► International freight loaded and unloaded in metric tonnes

#### AIRCRAFT MOVEMENTS\*

2020	2019	AIRPORT	2020	2019	Percent change
1	2	ATLANTA GA, US (ATL)	548 016	904 301	-39.4
2	1	CHICAGO IL, US (ORD)	538 211	919 704	-41.5
3	3	DALLAS/FORT WORTH TX, US (DFW)	514 702	720 007	-28.5
4	5	DENVER CO, US (DEN)	436 971	631 955	-30.9
5	20	PHOENIX AZ, US (DVT)	402 444	456 790	-11.9
6	7	CHARLOTTE NC, US (CLT)	397 983	578 263	-31.2
7	4	LOS ANGELES CA, US (LAX)	379 364	691 257	-45.1
8	12	GUANGZHOU, CN (CAN)	373 421	491 249	-24.0
9	11	SHANGHAI, CN (PVG)	325 678	511 846	-36.4
10	8	LAS VEGAS NV, US (LAS)	323 422	552 962	-41.5

► Movements: landings and takeoffs