

AAPA

BRUNEI DARUSSALAM 2024
68TH ASSEMBLY OF PRESIDENTS

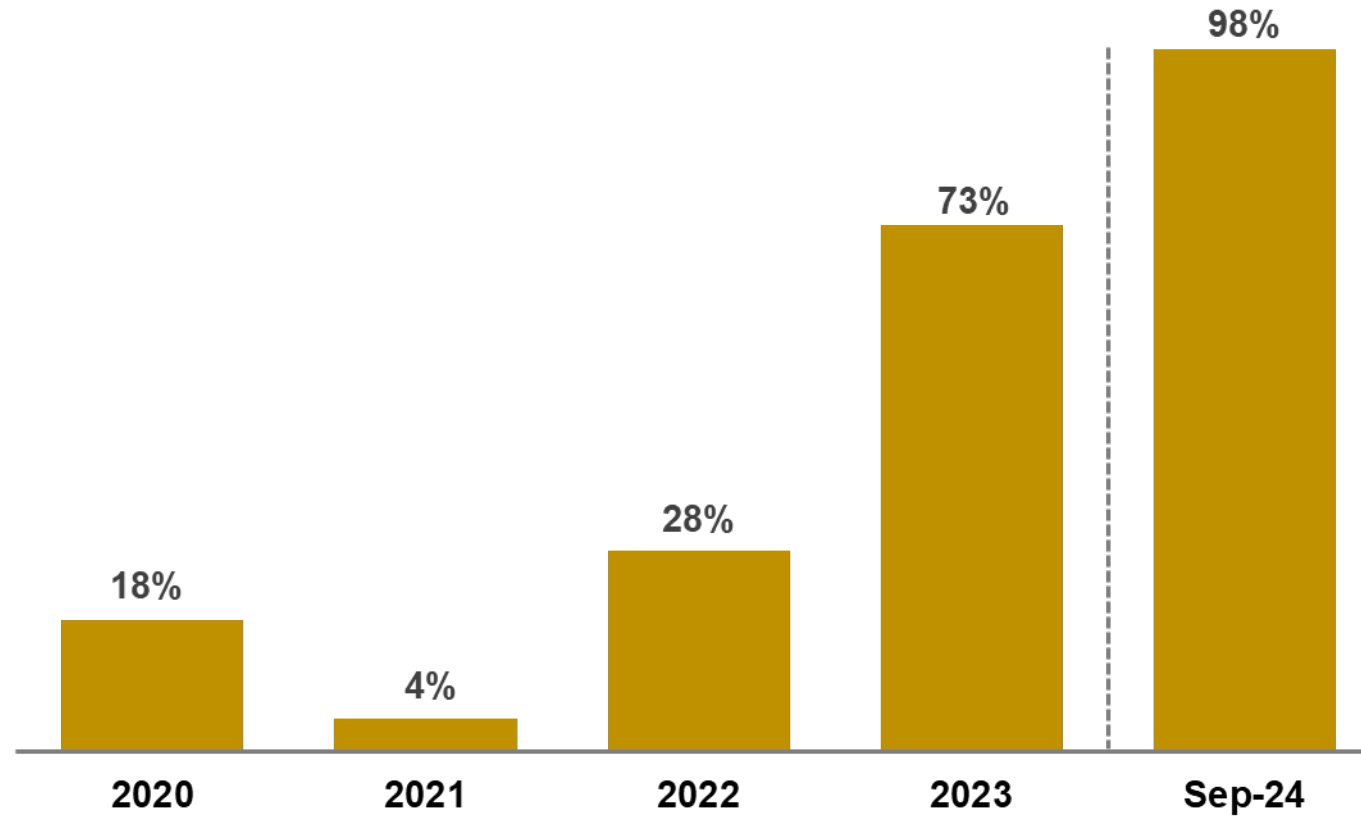
Introductory Remarks

Subhas Menon
Director General
Association of Asia Pacific Airlines

Asia Pacific international traffic nearly back to 2019

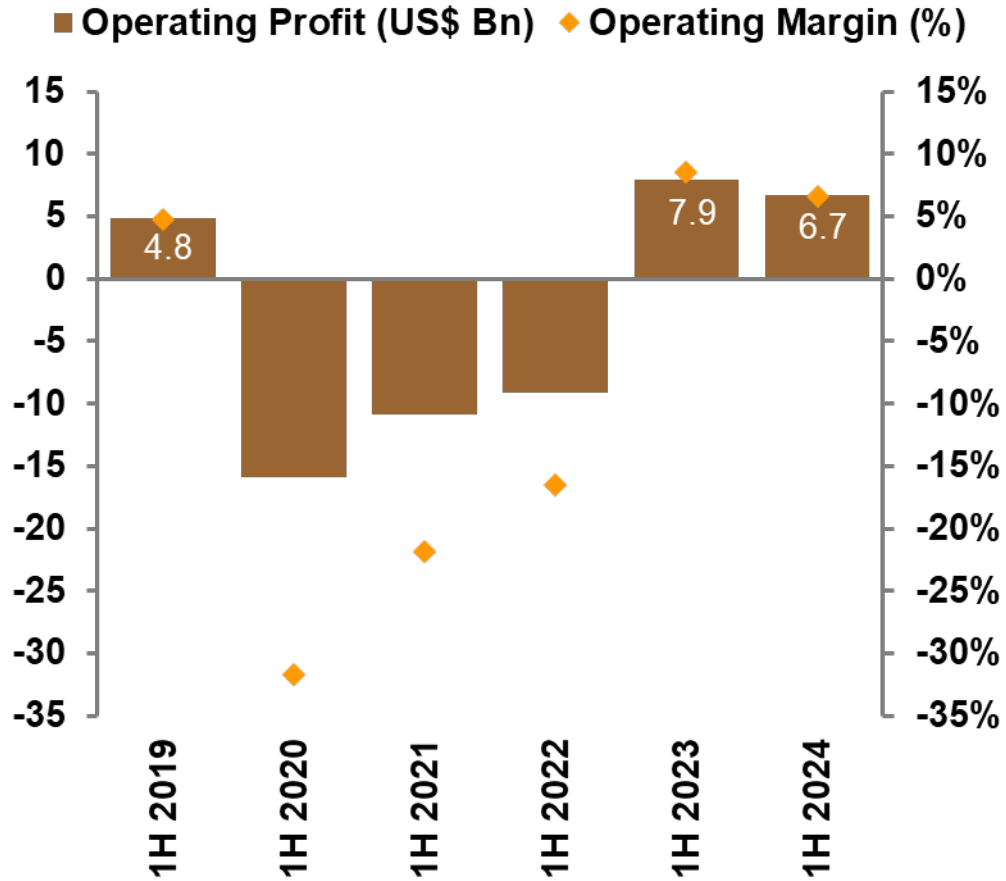
International Passenger Demand

Passenger Numbers as a % of Corresponding Period in 2019

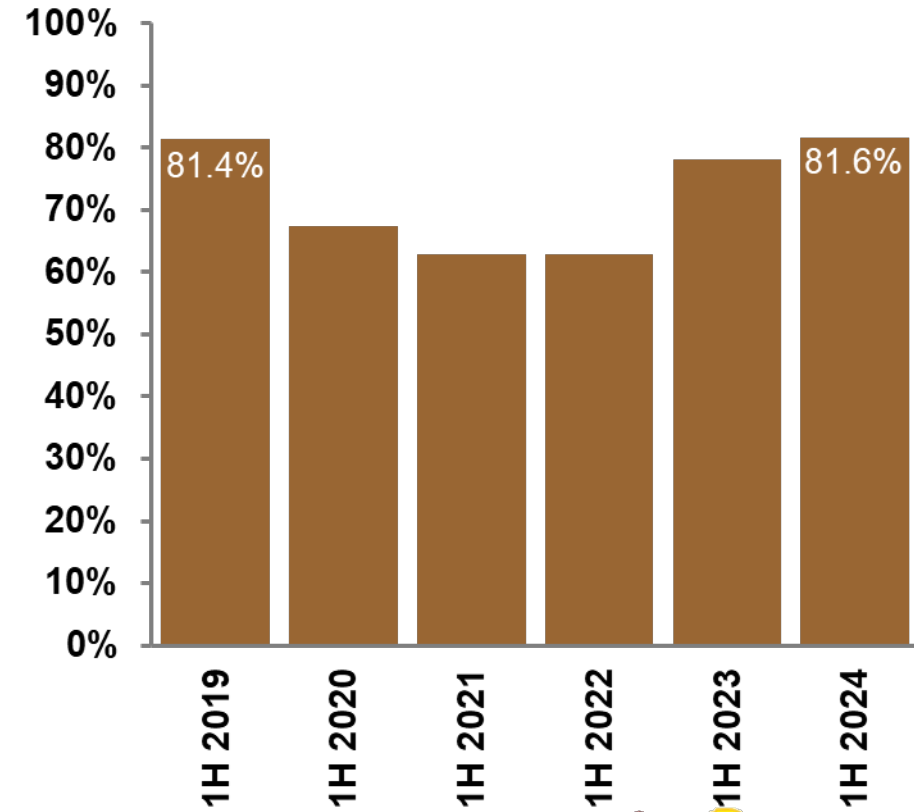


Financial performance and load factors at pre-pandemic levels

Operating Profit Trends



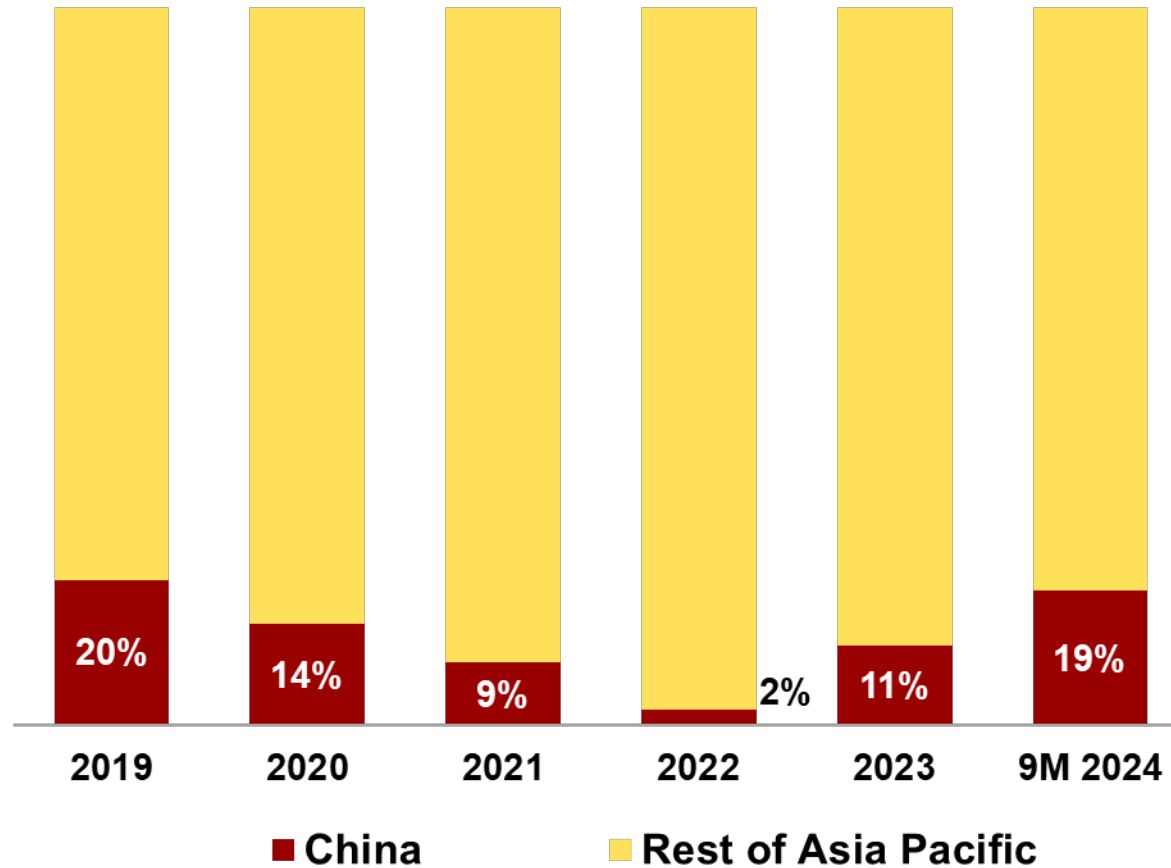
Systemwide Passenger Load Factor



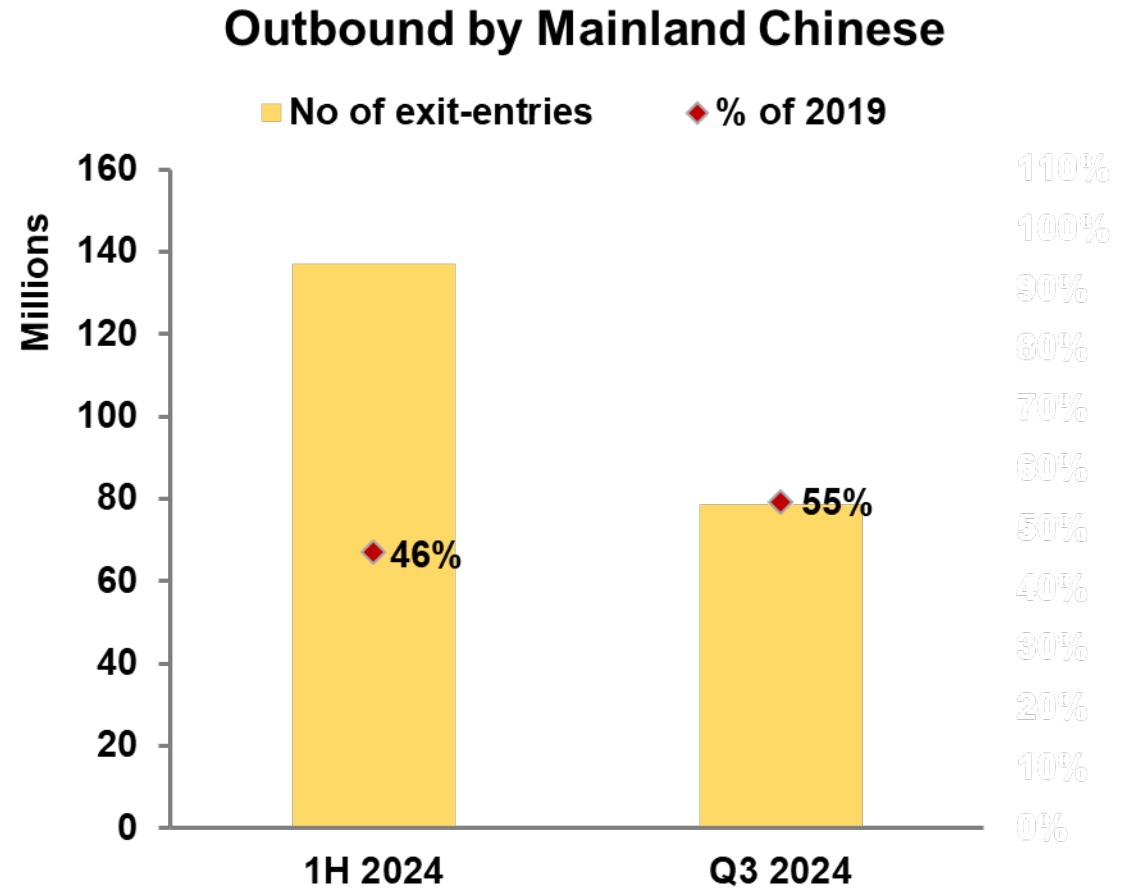
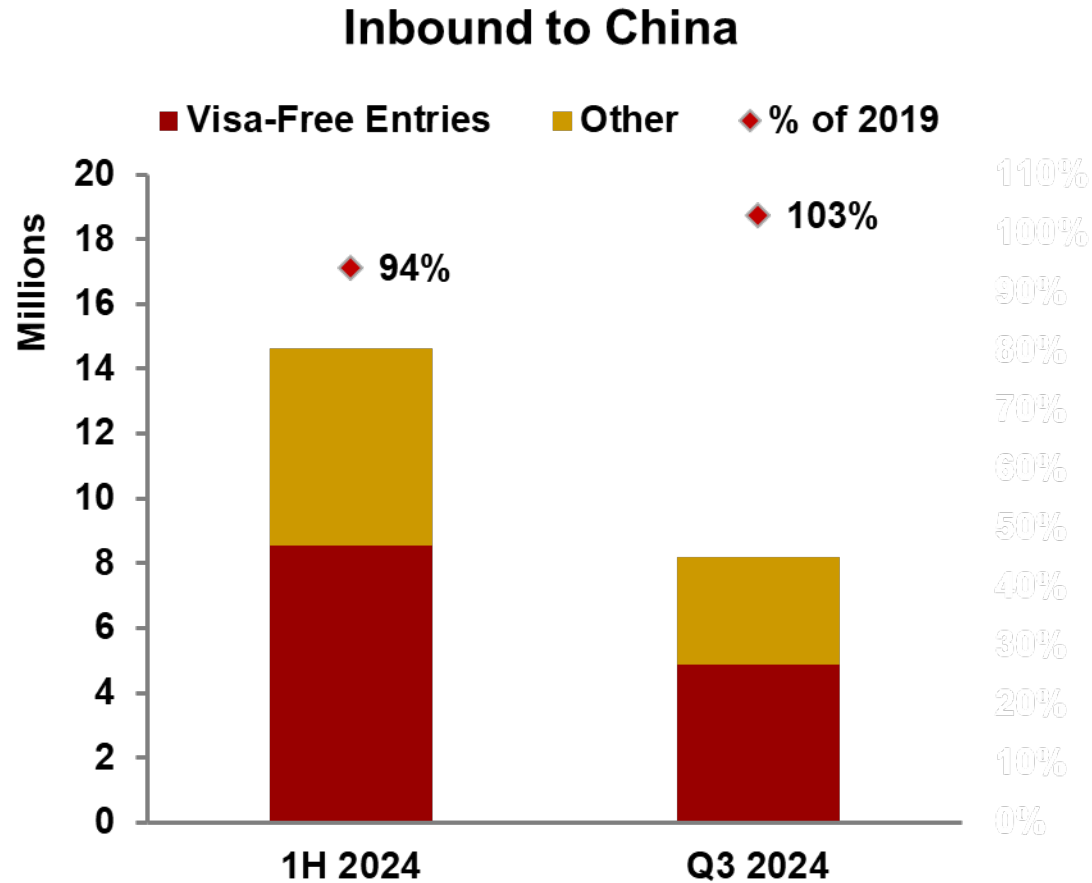
Note: Data consolidated from 27 Asia Pacific Airlines
Source: AAPA

Mainland Chinese carriers assert their presence

International Passenger Traffic Market Share
RPK as a % of Asia Pacific



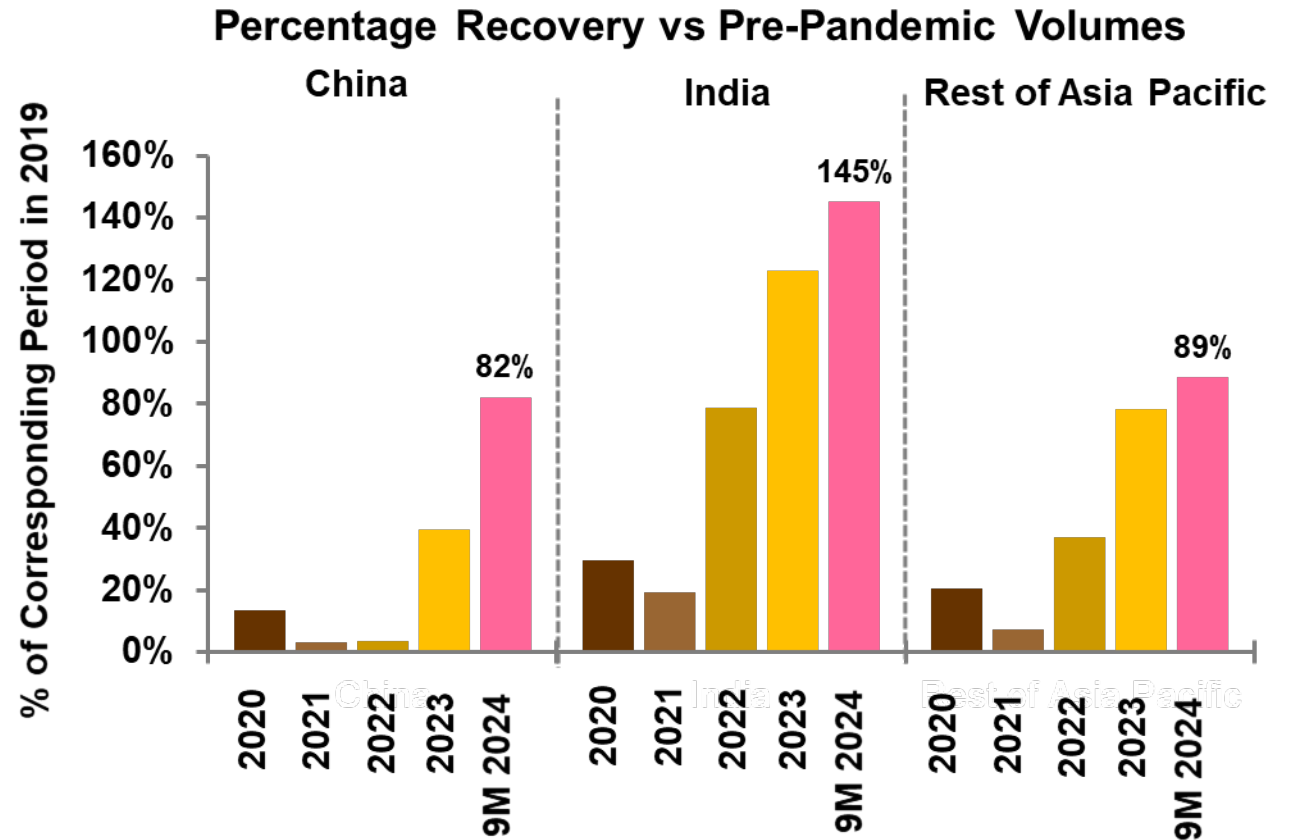
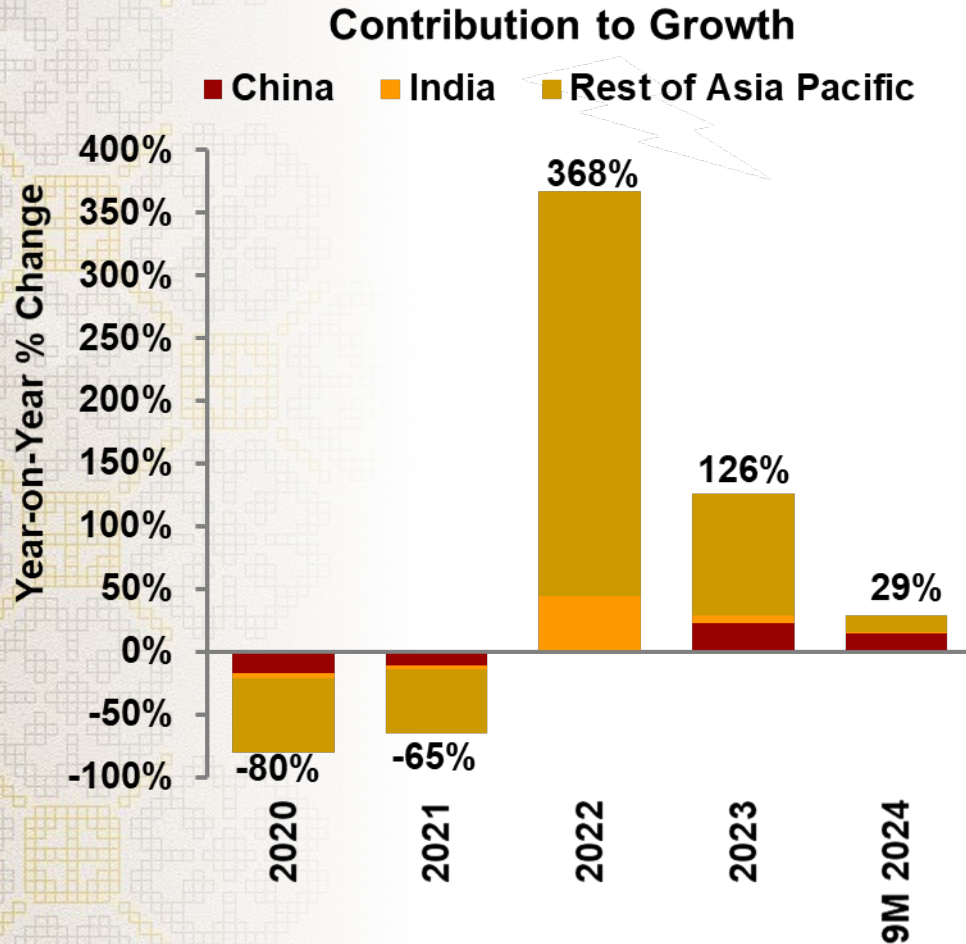
Travel to China compensating for weaker outbound



Note: Data refers to all ports of entry. Inbound traffic refers to foreigners only
Source: National Immigration Administration, China

Rest of Asia doing the heavy lifting

International Passenger Demand

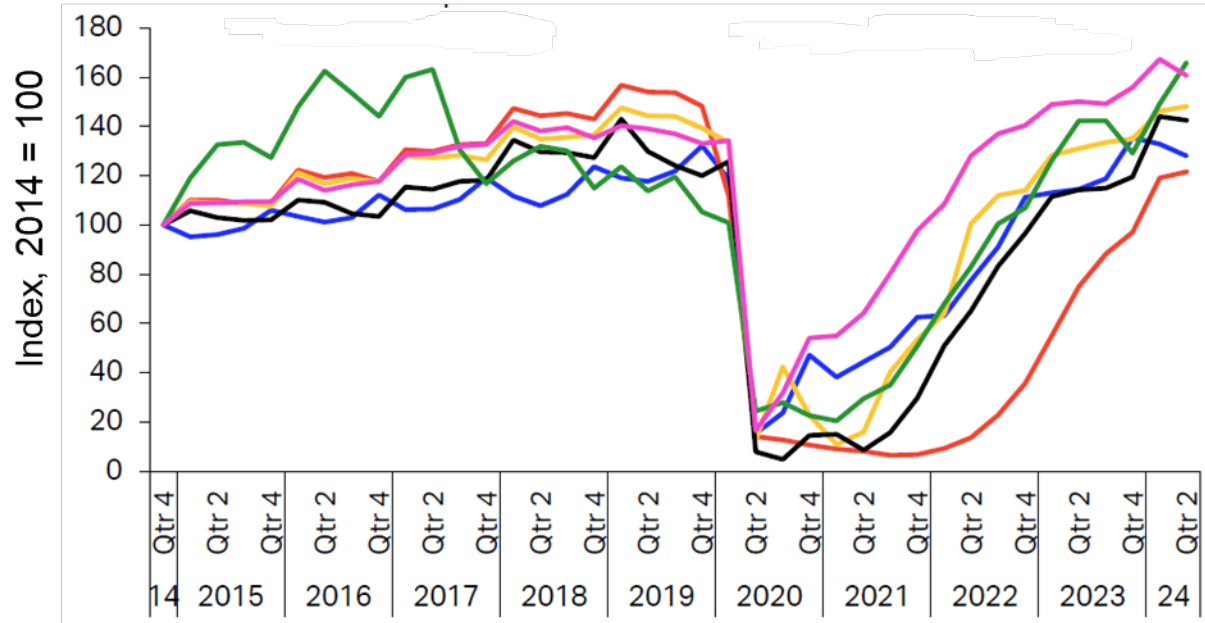


Note: Chart on the left shows Asia Pacific Airlines year-on-year % growth, and contributions to growth from mainland China carriers, Indian carriers and carriers based in the rest of the Asia Pacific

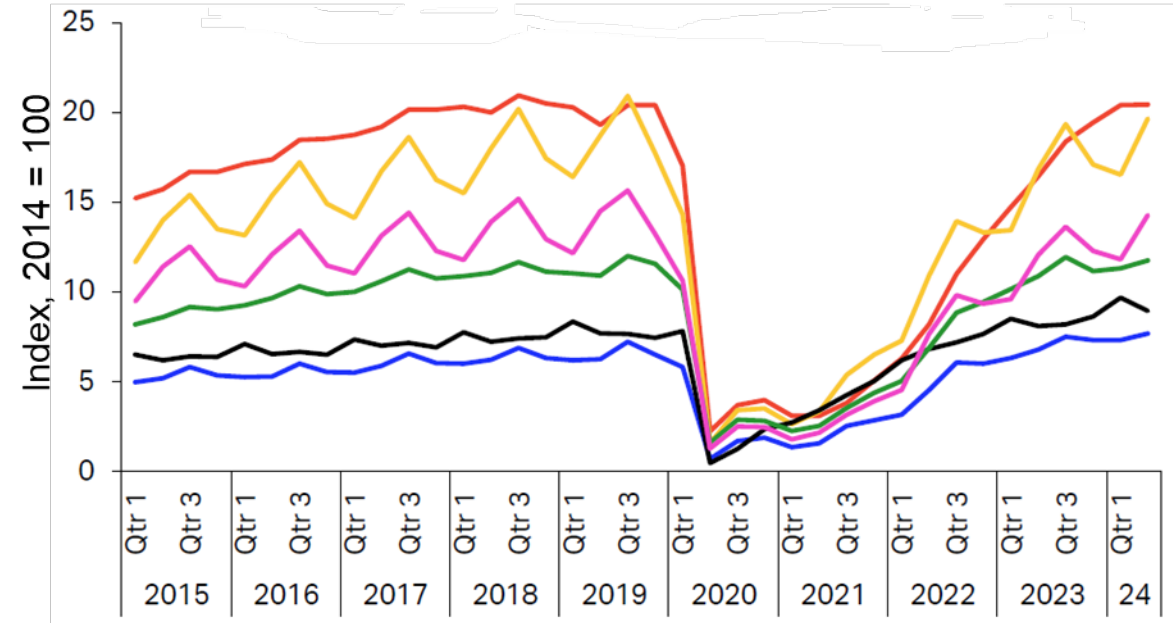
Source: CAAC, DGCA, © International Air Transport Association, 2019. All Rights Reserved

Air connectivity has bounced back

Inter-Regional Air Connectivity



Intra-Regional Air Connectivity

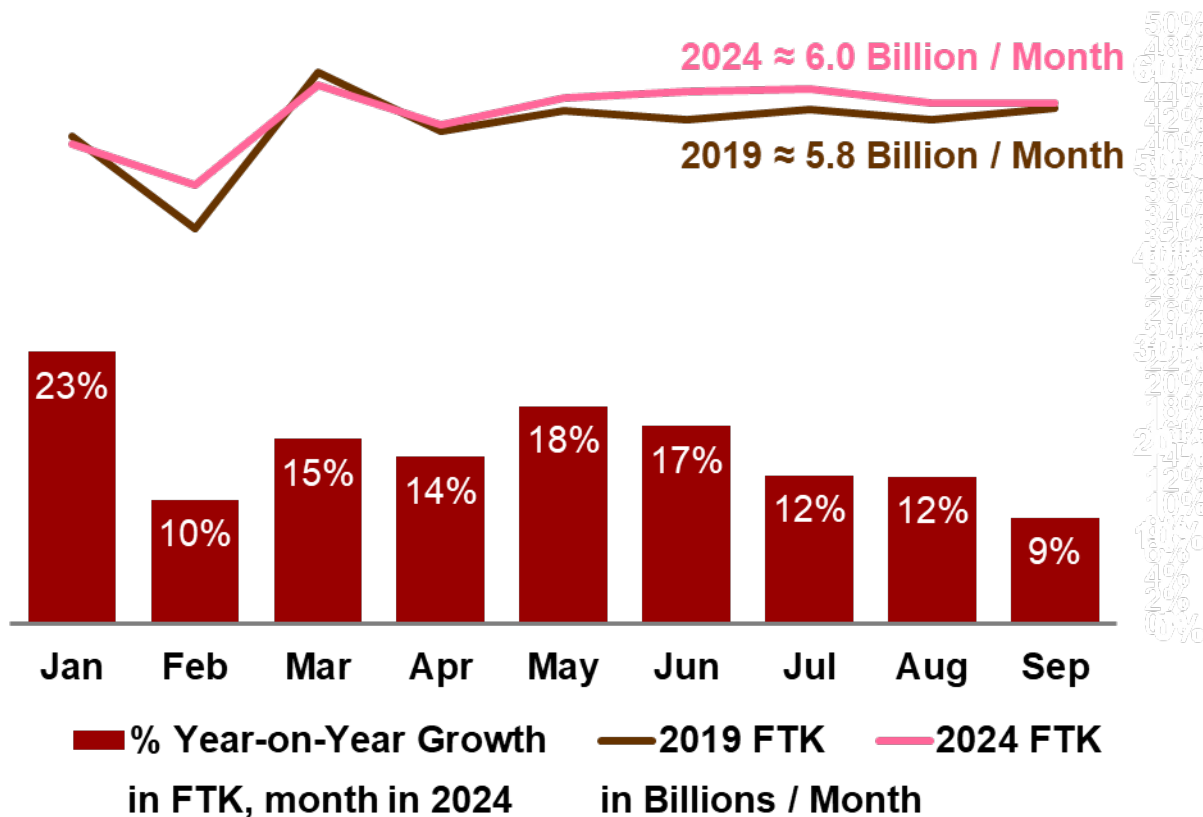


- Asia Pacific
- North America
- Latin America
- Europe
- Middle East
- Africa

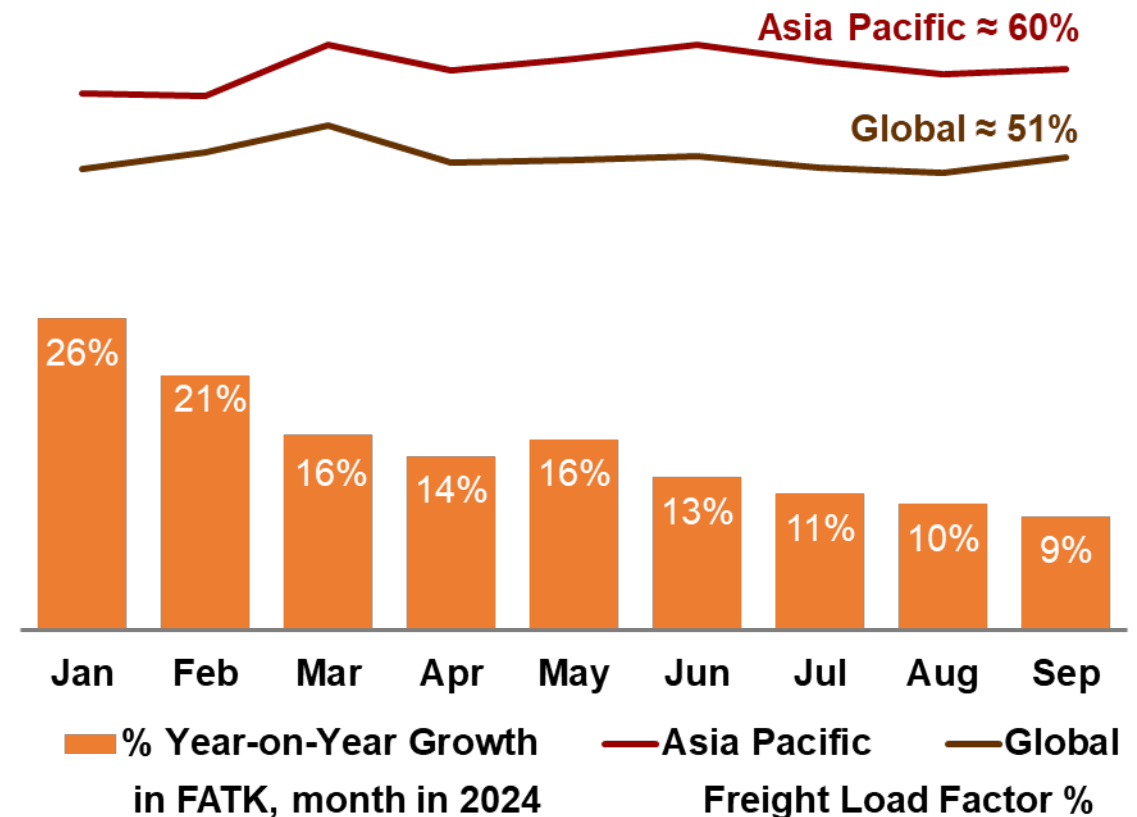


Air cargo markets up, after 2 years in decline

Strong air cargo demand



Freight load factors remain elevated

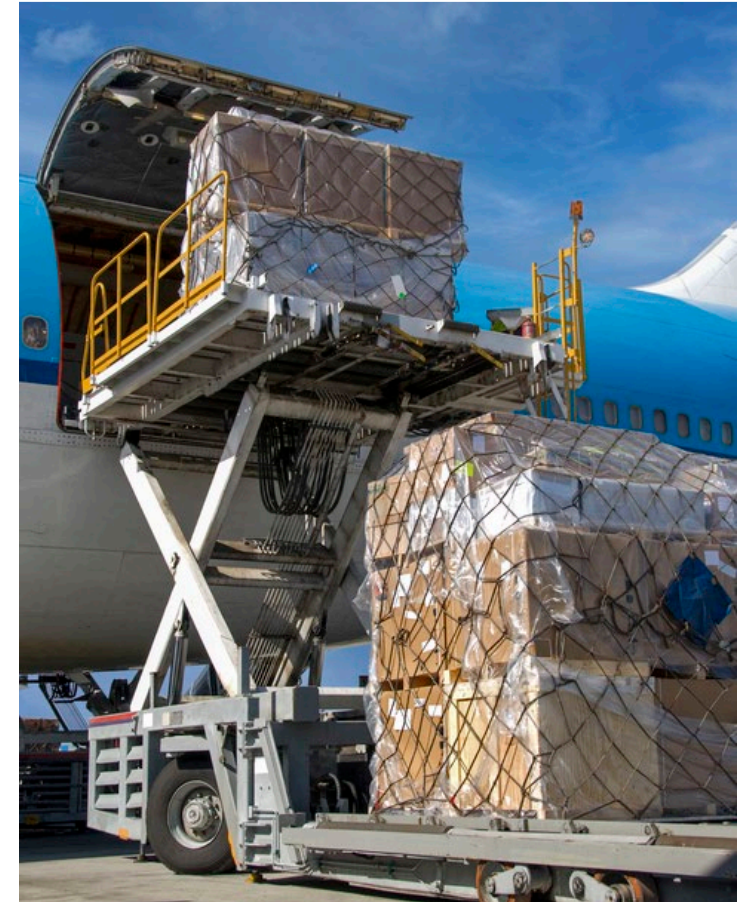
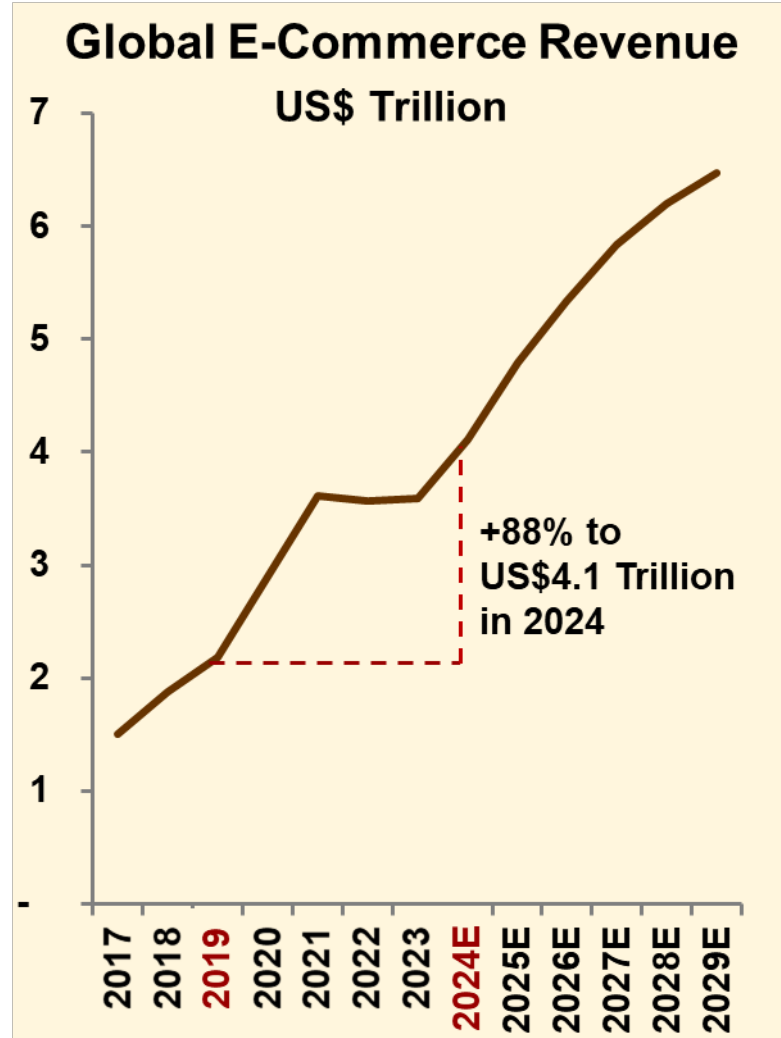


Note: Data refers to Asia Pacific airlines international air cargo operations

Source: AAPA, © International Air Transport Association, 2019. All Rights Reserved



Surge in e-commerce driving air cargo demand



Aviation – A key driver of socio-economic well-being

Job Creation

87.7 million
jobs supported

Economic Impact

US\$3.5 Trillion
in GDP

Trade Facilitation

35% of world
trade by value

Connectivity

24,400
airport pairs

Tourism

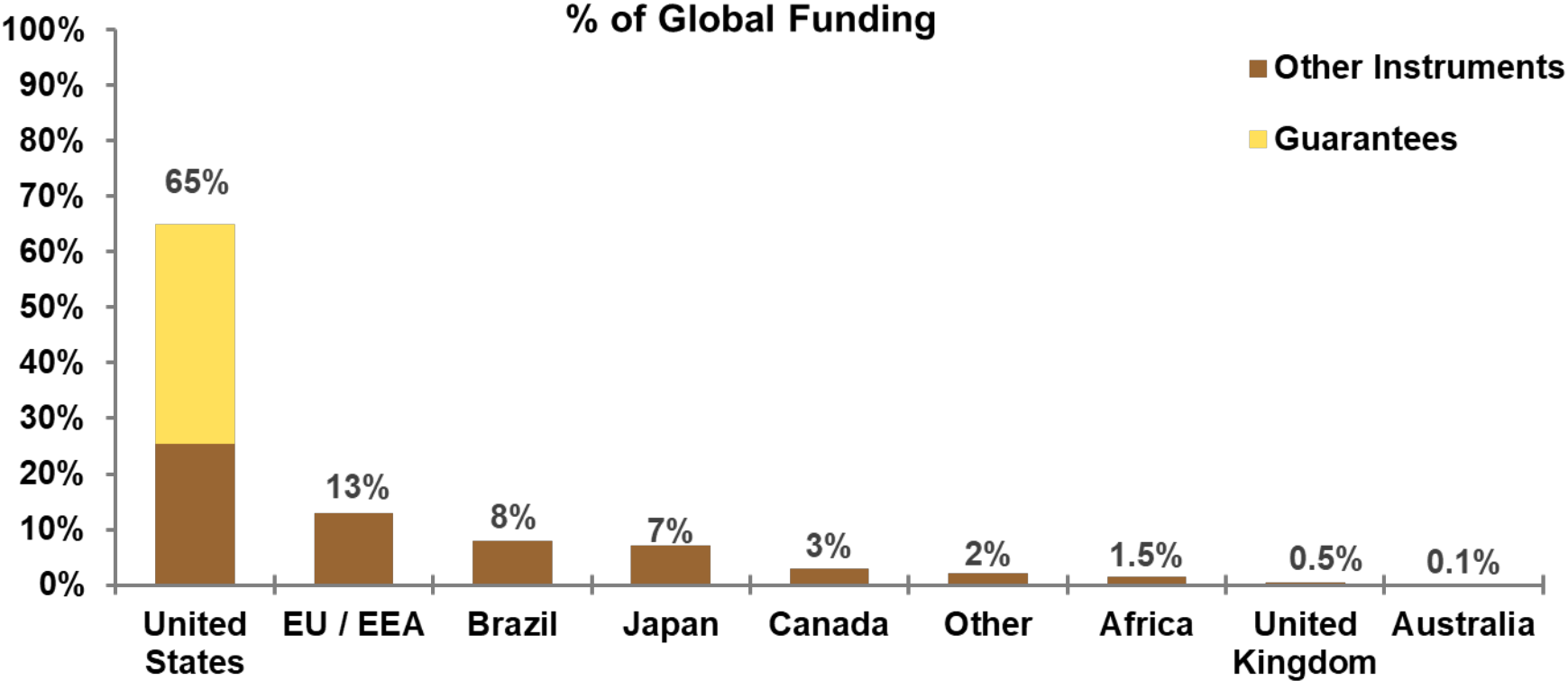
1.5 billion
tourist arrivals

Humanitarian Aid

325,000
humanitarian flights

Net-zero with more supportive government policies

Public Funding Available for Advanced Biofuels, including SAF, by Region (2024 – 2025)



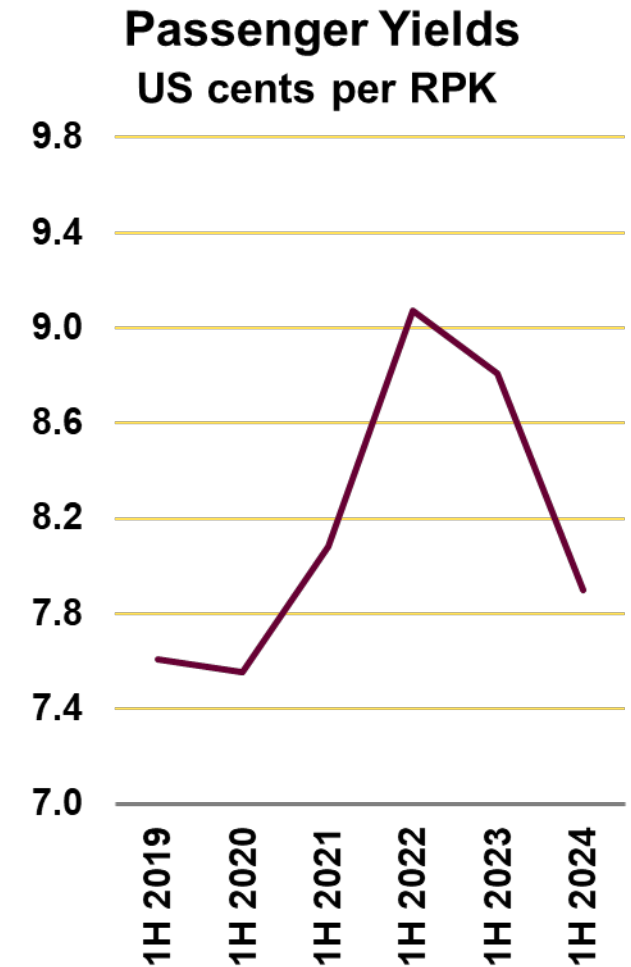
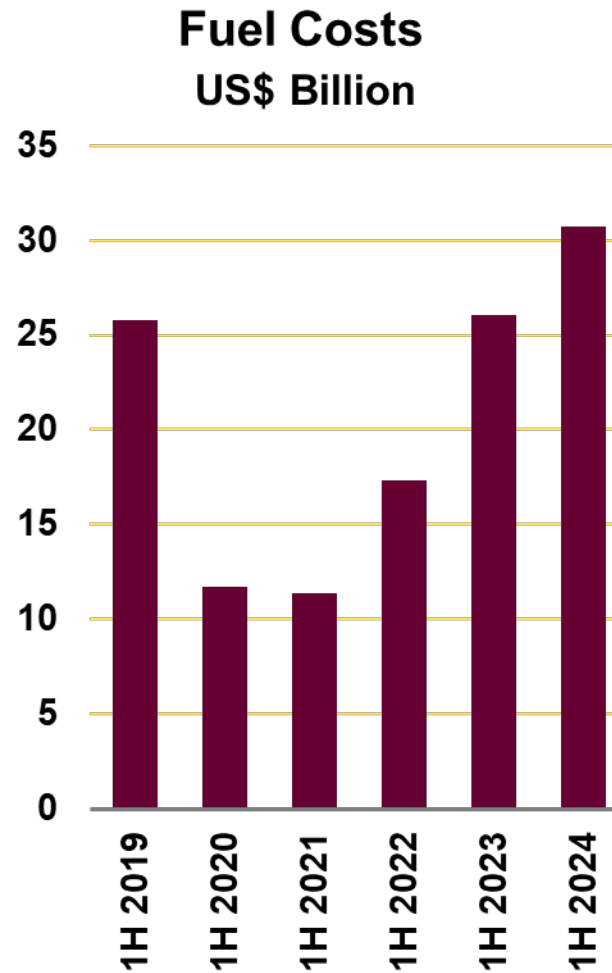
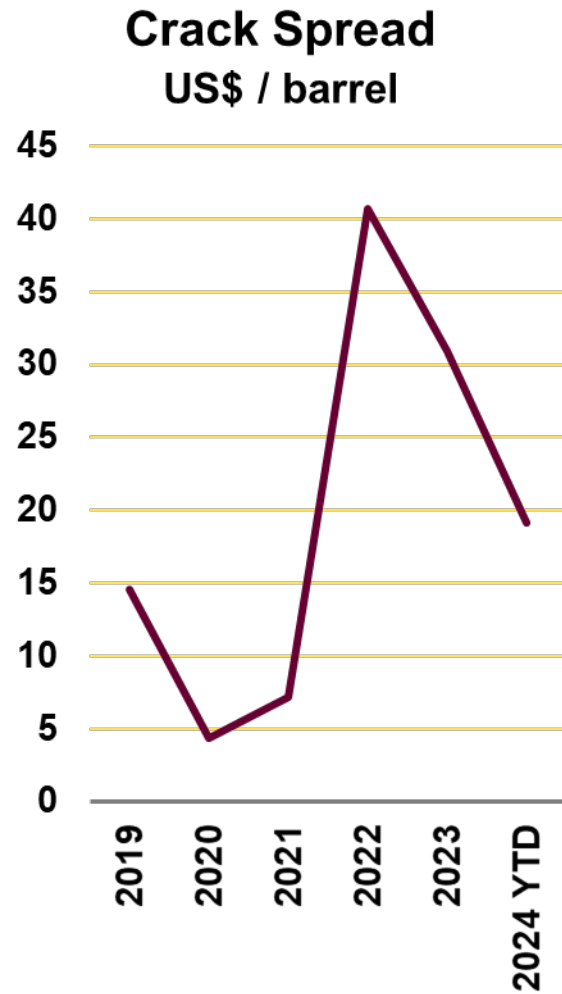
United States accounts for 65% of global public funding made available

Note: IATA reviewed approximately 140 public financial aid programs supporting sustainable technologies such as advanced biofuels. IATA’s analysis is drawn from 30 of these funds that include SAF development. Data based on estimates

Source: © International Air Transport Association, 2019. Chart of the Week. All Rights Reserved

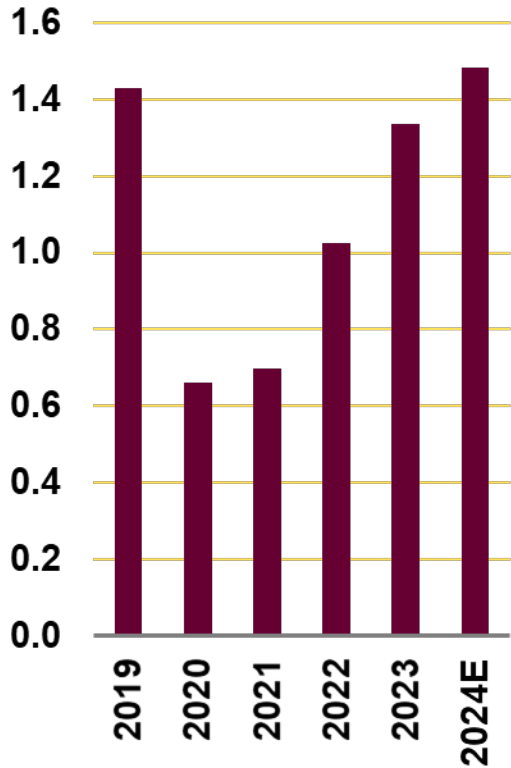


Rising costs and declining yields squeezing bottom-lines

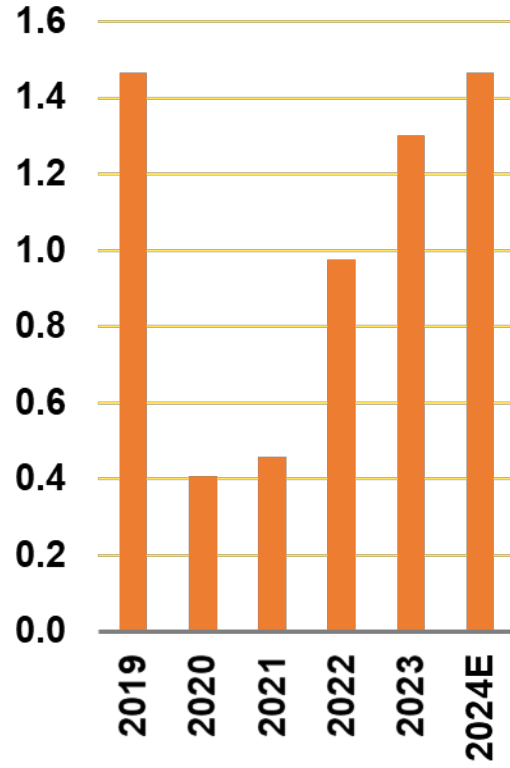


An optimistic future

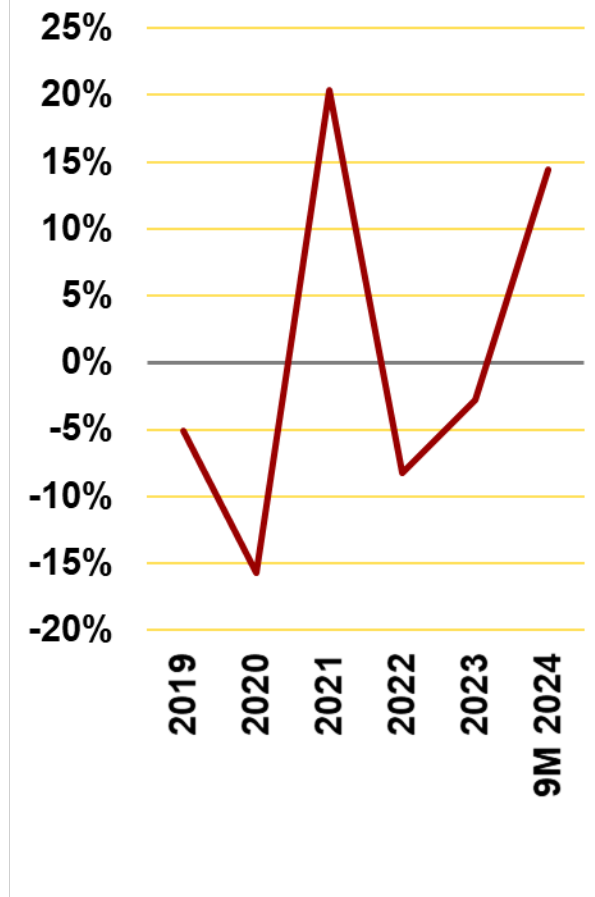
Business Travel Spend
US\$ Trillion



International Tourist Arrivals
Millions



Air Cargo Demand
Year-on-Year % Growth



GDP Growth
Annual % Change

