

حال الصناعة

State of The Industry

عبد الوهاب تفاحة
الأمين العام
Secretary General

عبد الوهاب تفاحة
الأمين العام

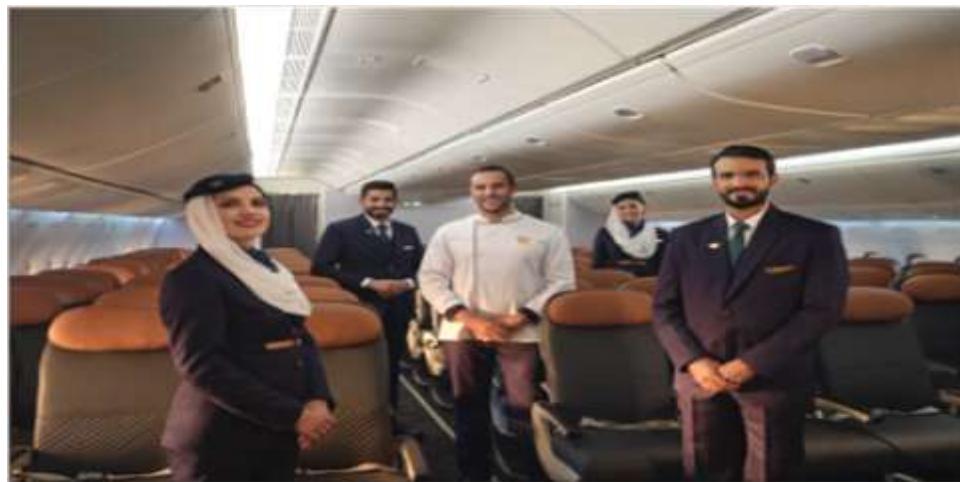


الاتحاد العربي للنقل الجوي
arab air carriers' organization
30 October - 01 November 2023 - Riyadh Saudi Arabia



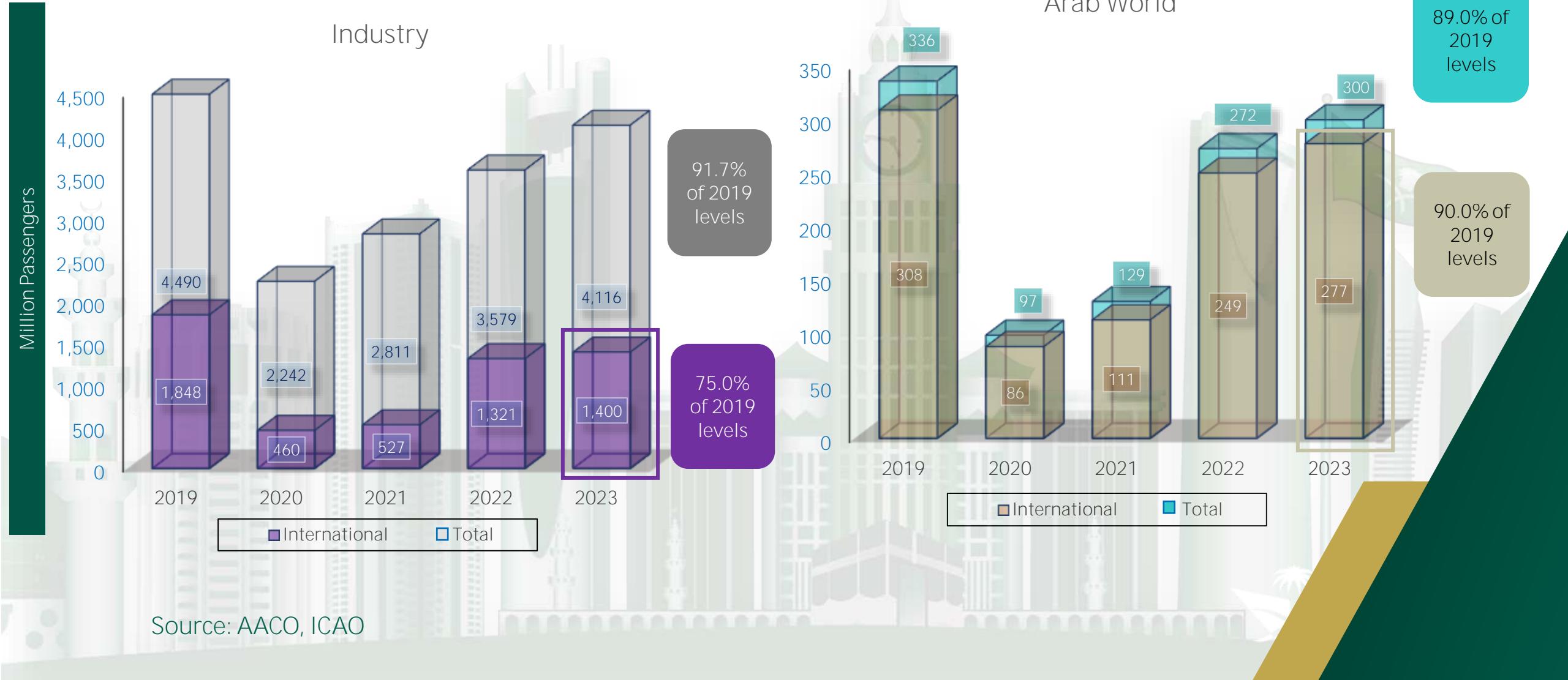
وزارة النقل والخدمات اللوجستية
Ministry of Transport and Logistic Services





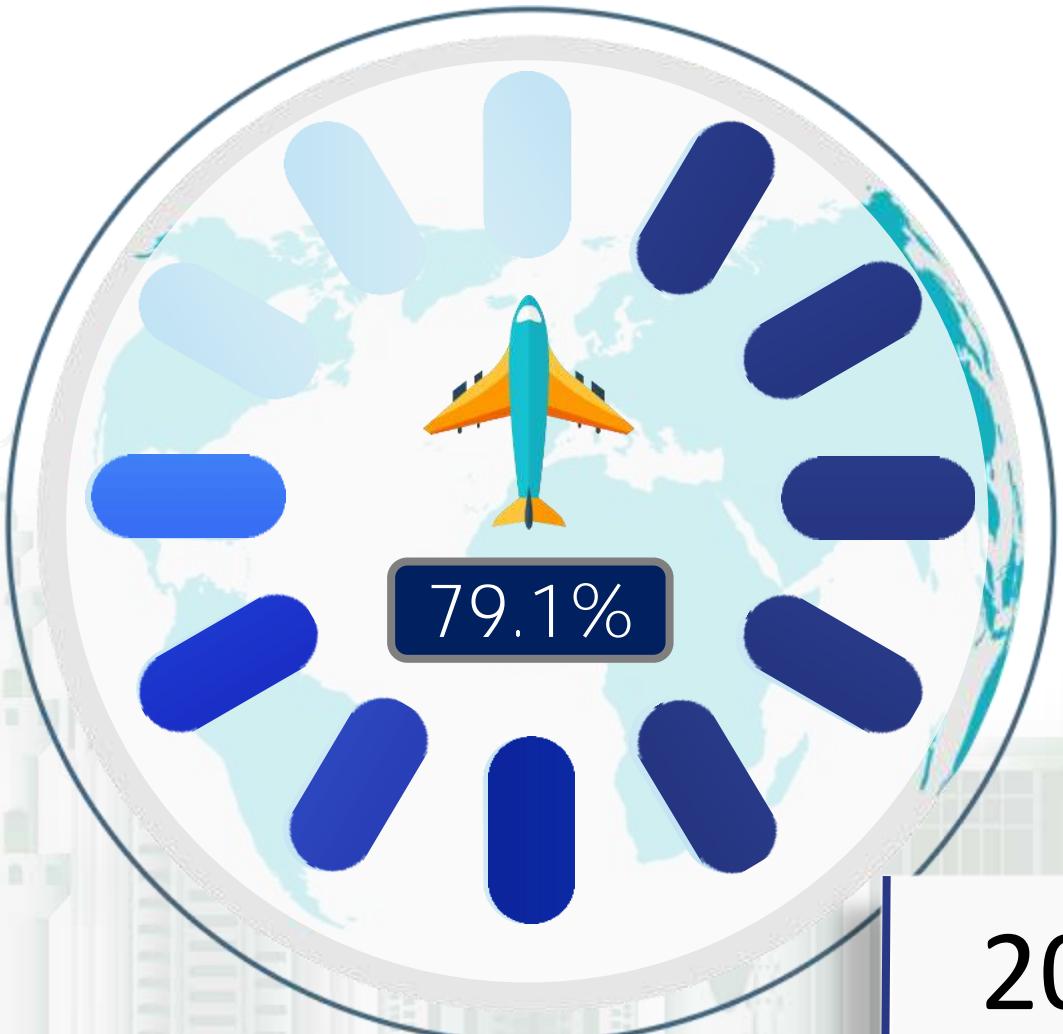
السعودية
Saudia

PASSENGER TRAFFIC DEVELOPMENT SINCE COVID-19 AND ESTIMATES FOR 2023



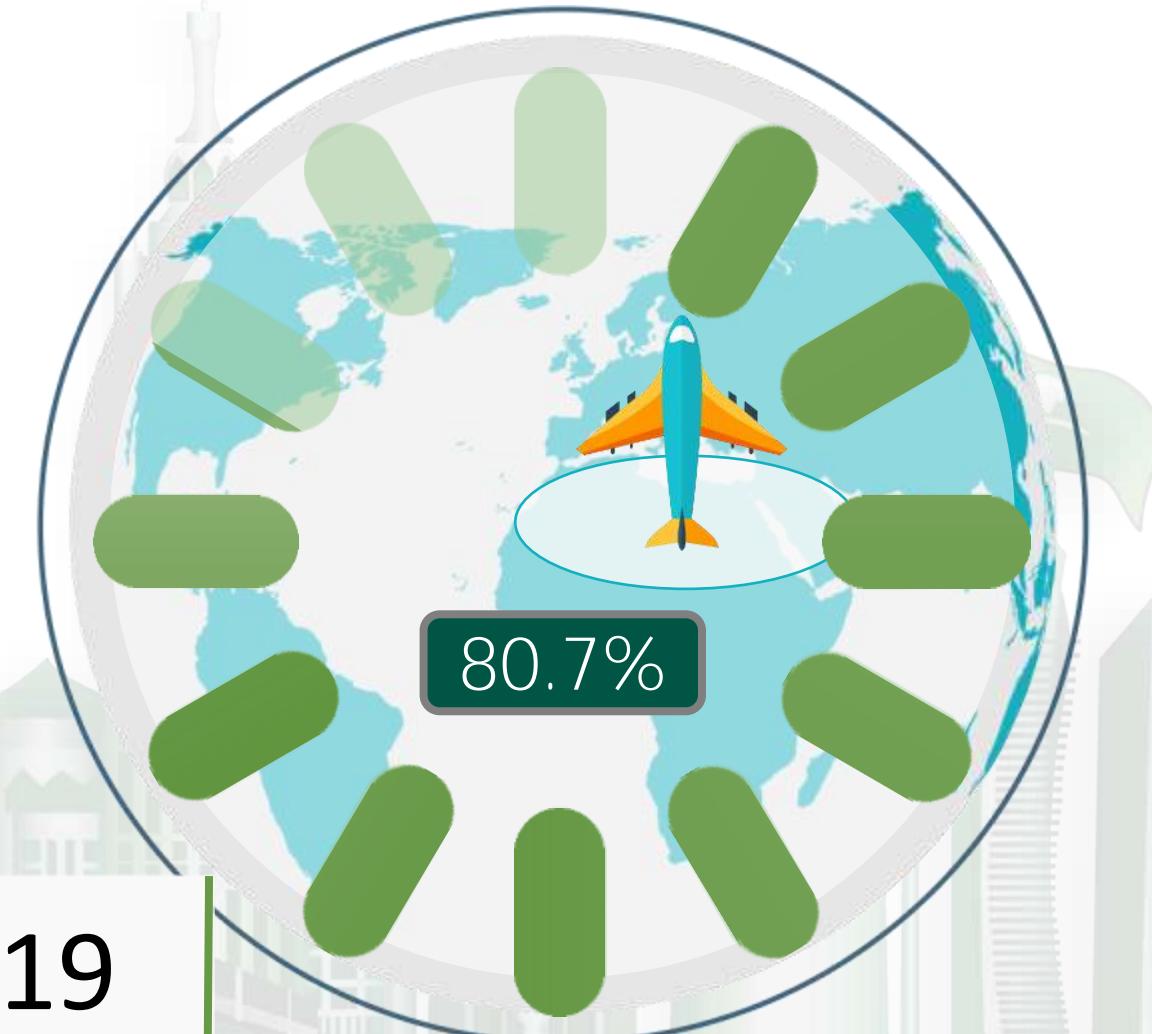
PASSENGER LOAD FACTOR IN Q1-2023 COMPARED TO Q1-2019

Industry



1.7 percentage points less
than 2019 levels

2019

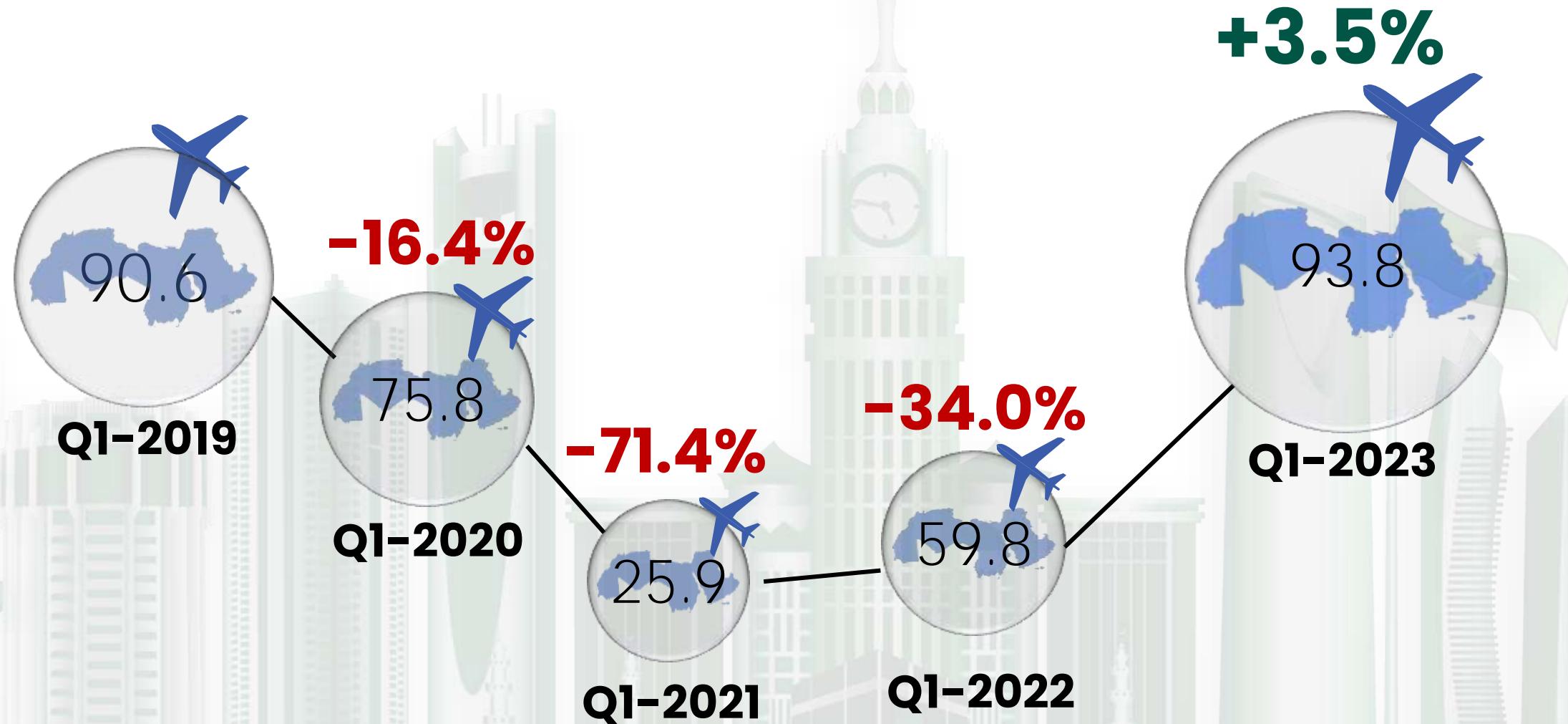


6.6 percentage points
above 2019 levels

AACO Members

Arab Airports Operations Quarterly Changes Compared To 2019

Million Passengers



Labels in red/green represent change compared to the same period in 2019

Source: AACO, ACI











السياسات العقلانية

Reasonable
Policy

تطوير البنية التحتية

Infrastructure
Development

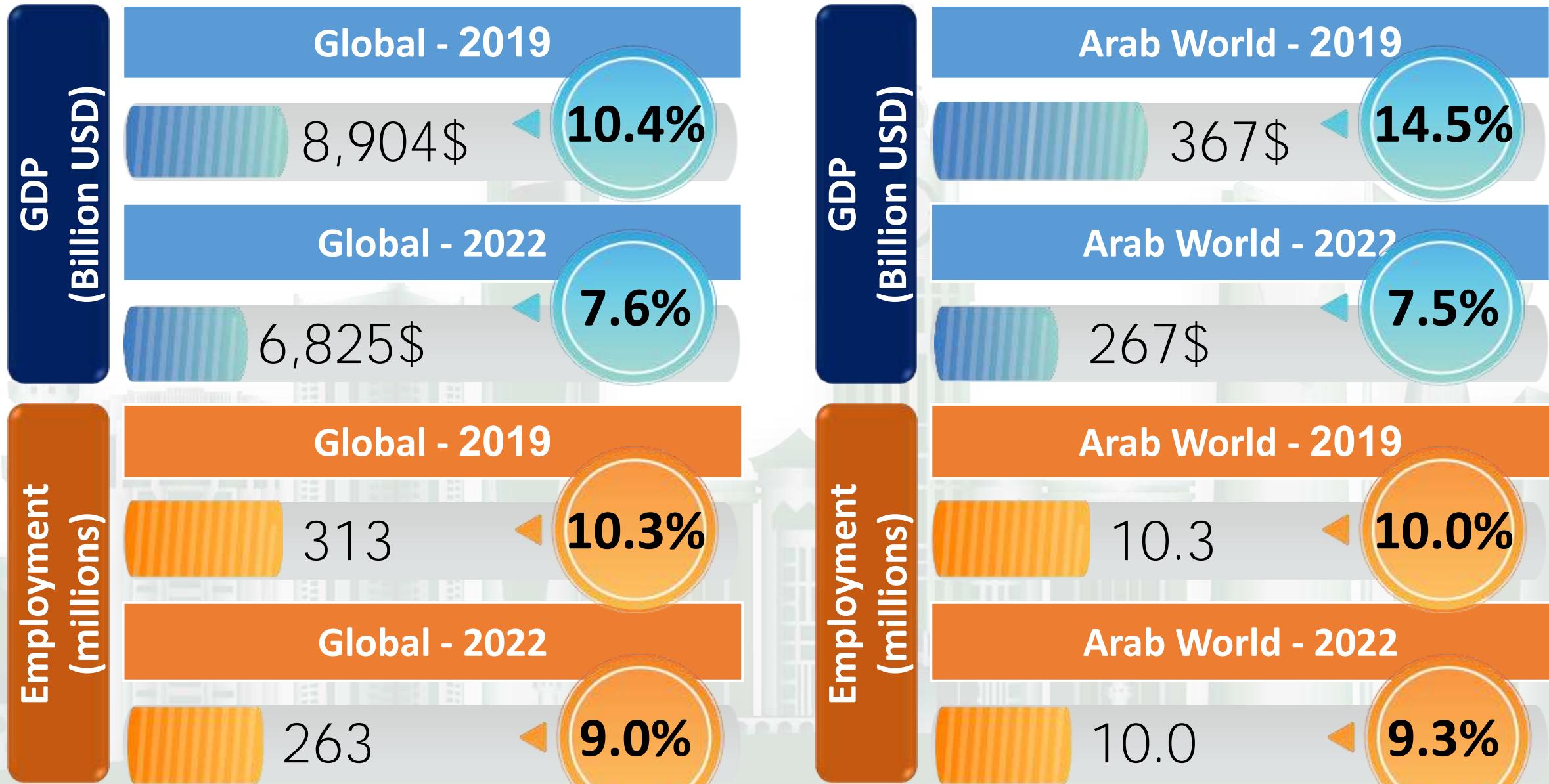
جودة الخدمات

Quality of
Service

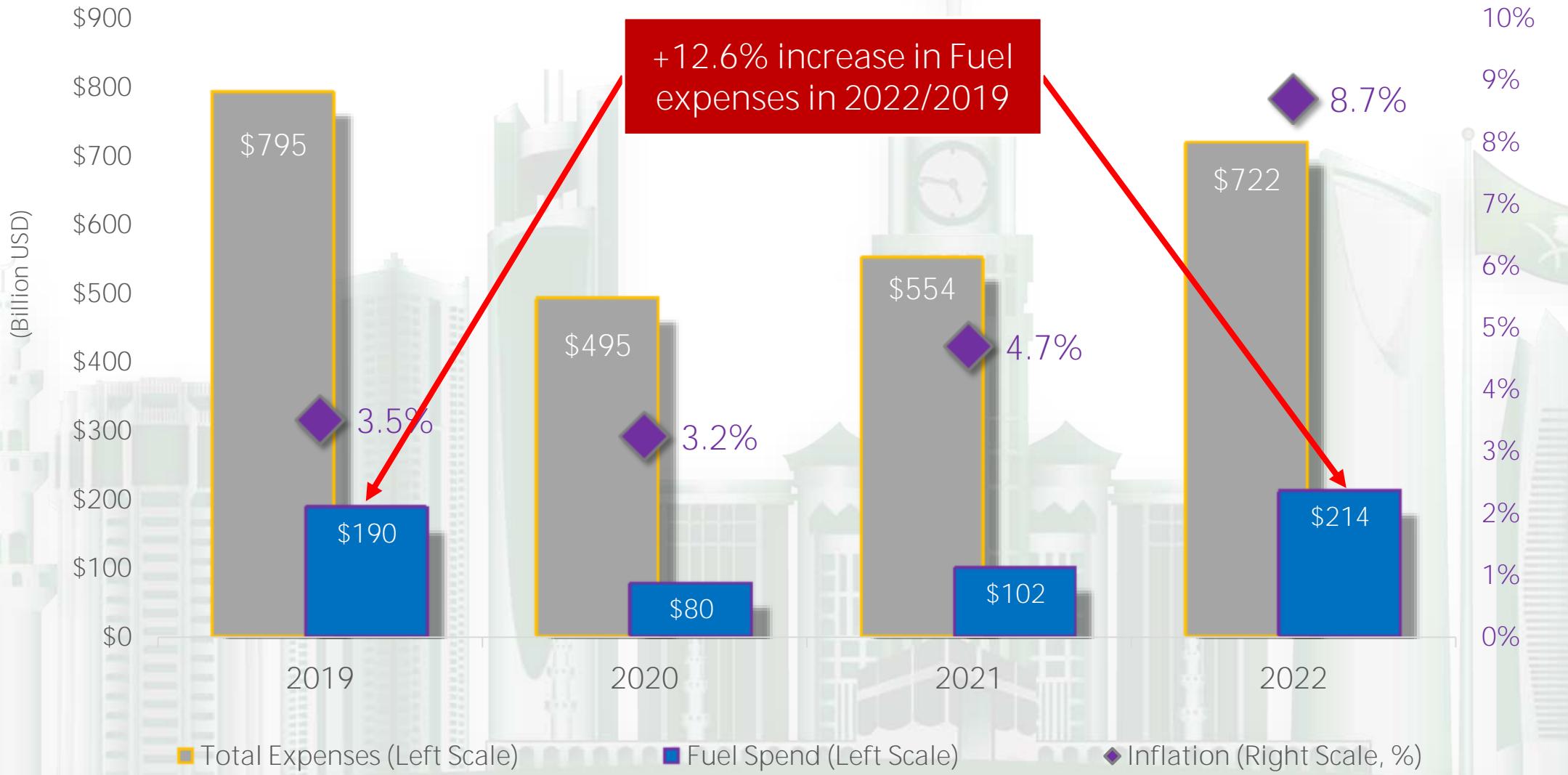
ادارة العلاقة مع
العملاء والشركاء

Customer &
Partners
Relationship

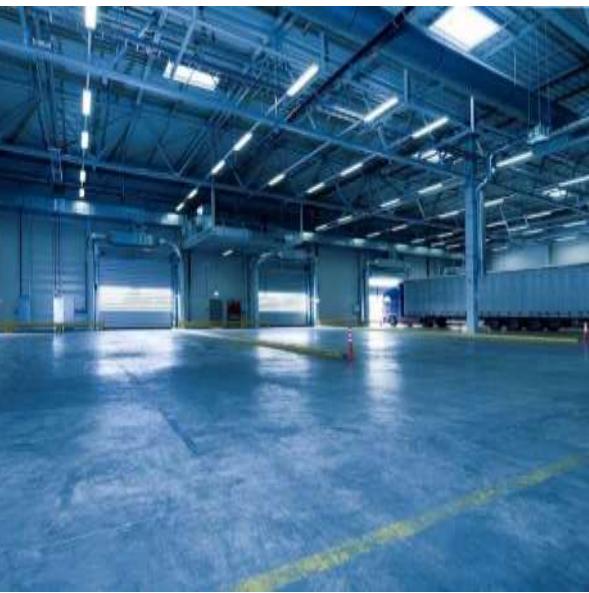
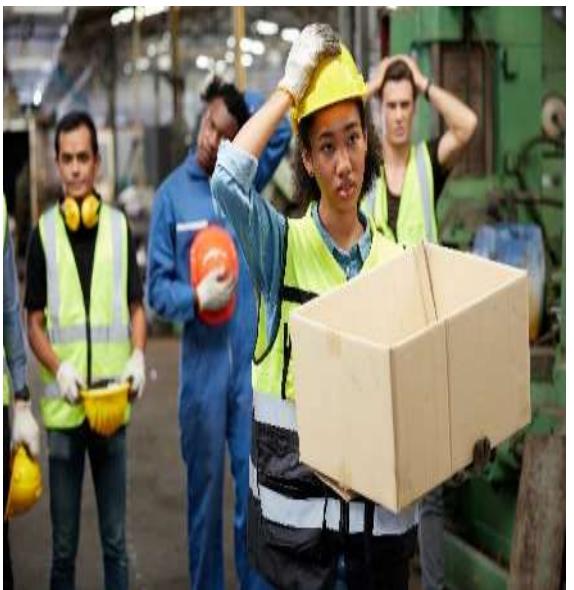
Travel & Tourism Contribution in GDP & Jobs Supported (2022 compared to 2019)



Total Operating and Fuel Expenses Compared to Inflation between 2019 and 2022

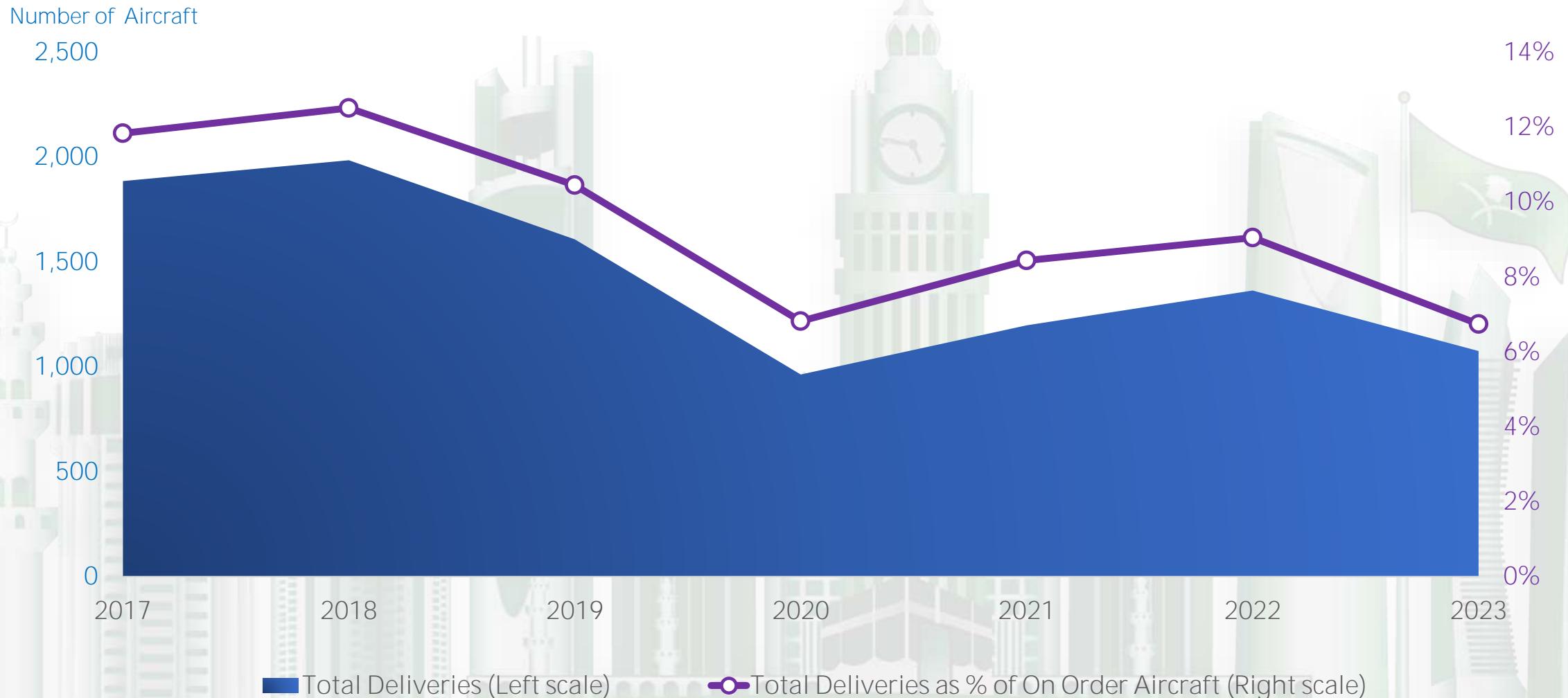


Source: AACO, IATA



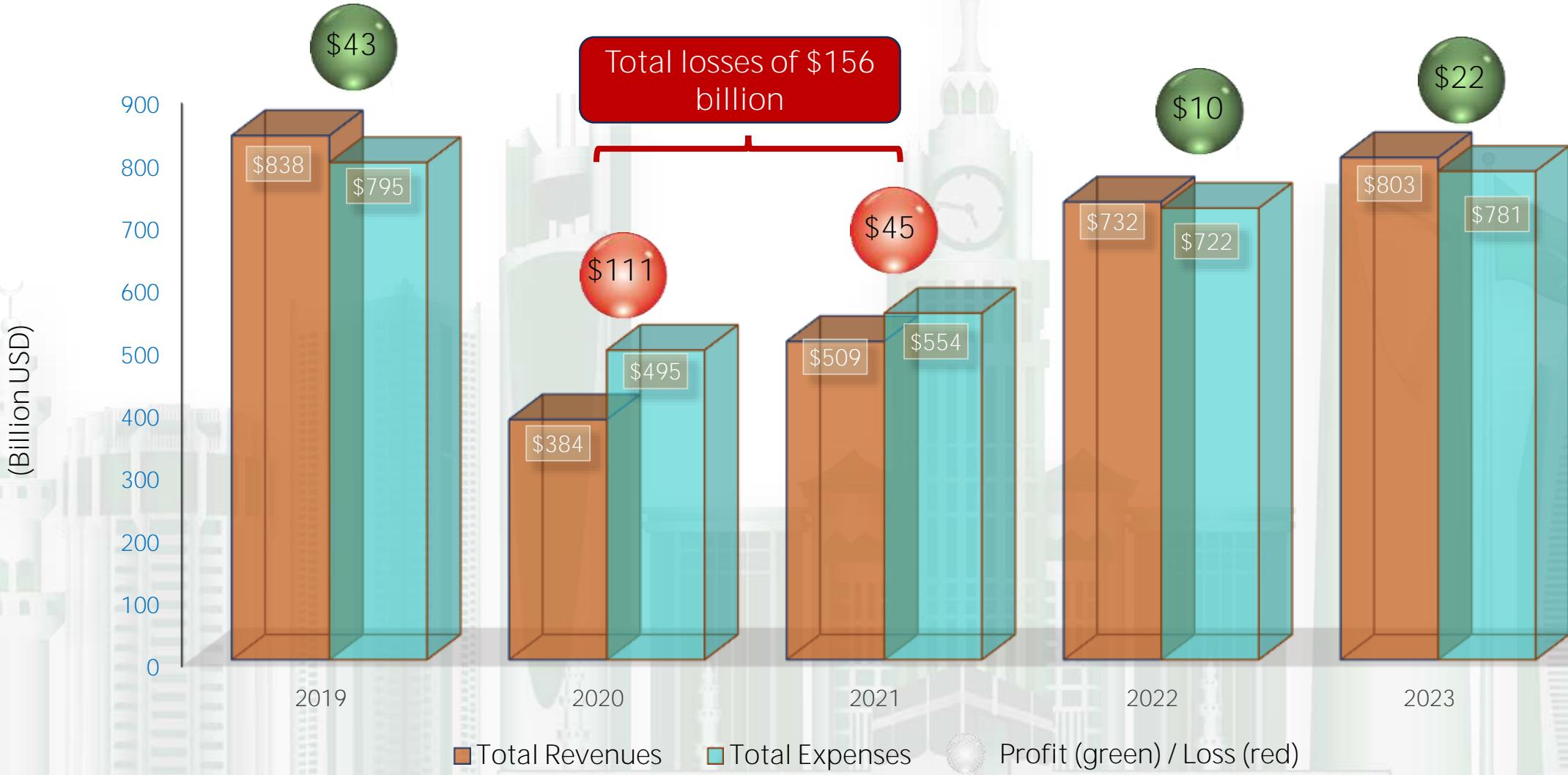
التأخير في تسليم الطائرات

Aircraft Deliveries' Trend between 2017 and 2023



Source: AACO, Cirium Fleets Analyzer

Industry's Financial Performance



Estimates start after 2022

Source: AACO, IATA

STAY CONNECTED
العالم الافتراضي



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العالم الحسّي









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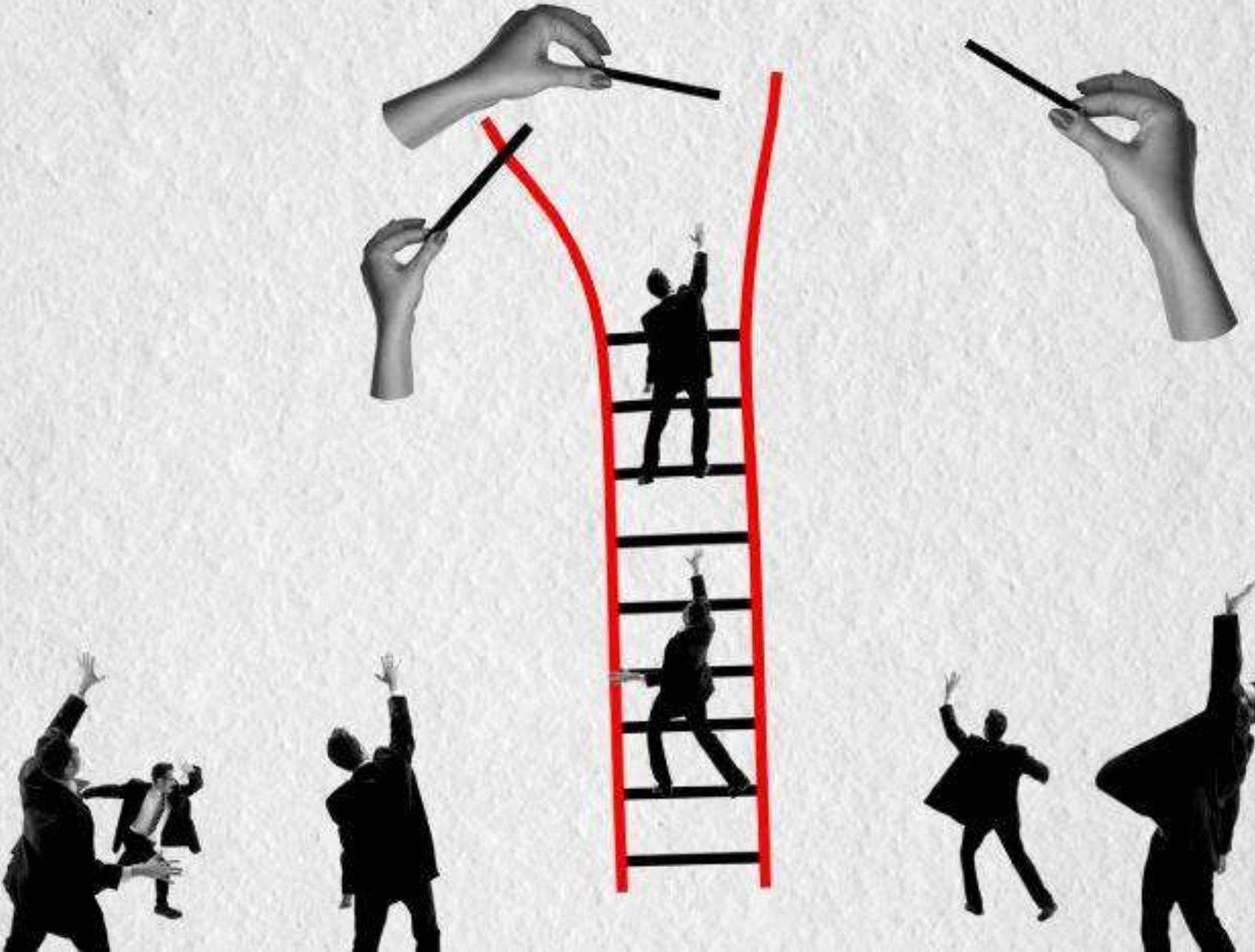






INFOMATION





الابداع
في المنتج



Product
Creativity

التكنولوجيا
المبتكرة



Innovative
Technologies

أفضل الأسعار



Best Prices

أفضل الخدمات



Best Services





CO₂

جعل السفر عملية سهلة
Seamless Travel



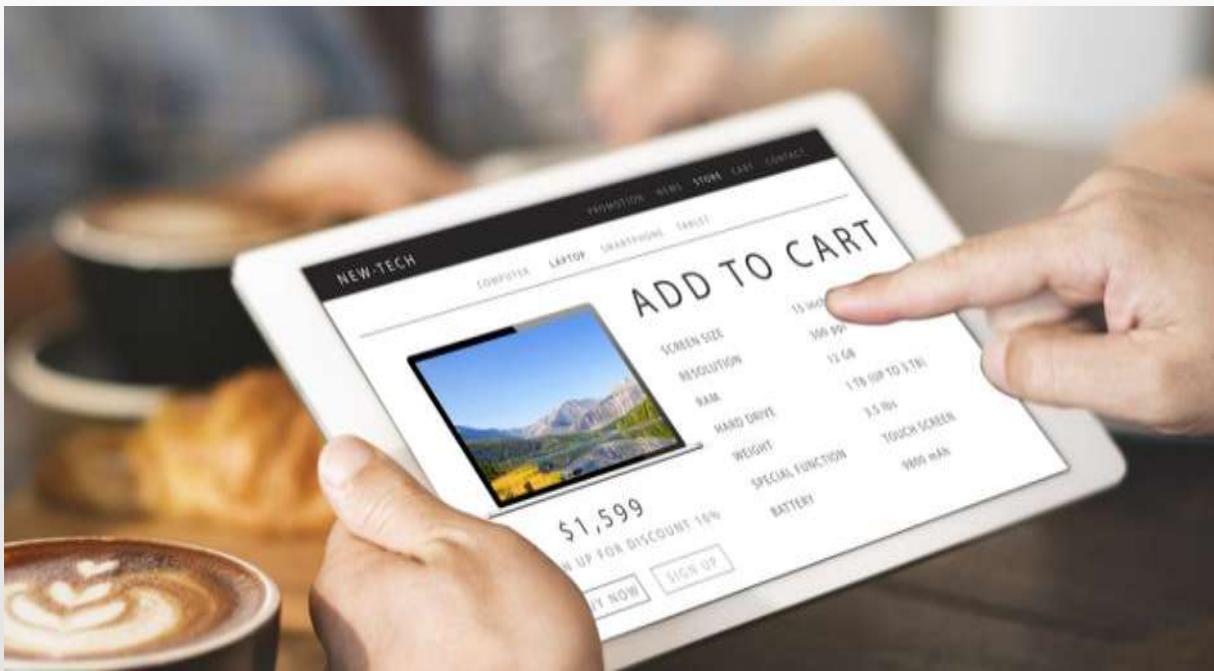
Two Principal
Duties

تخفيف الأثر البيئي وإزالته للسفر
Reduce & Eradicate
Environmental Footprint

التعامل مع الجمهور الحالي
والمستقبلي للمسافرين

To address the aspirations
of the current and future
travelling public

واجبين
رئيسيين



الحكومات
Governments



المسافر
Passengers



شركات الطيران
Airlines



المطارات
Airports



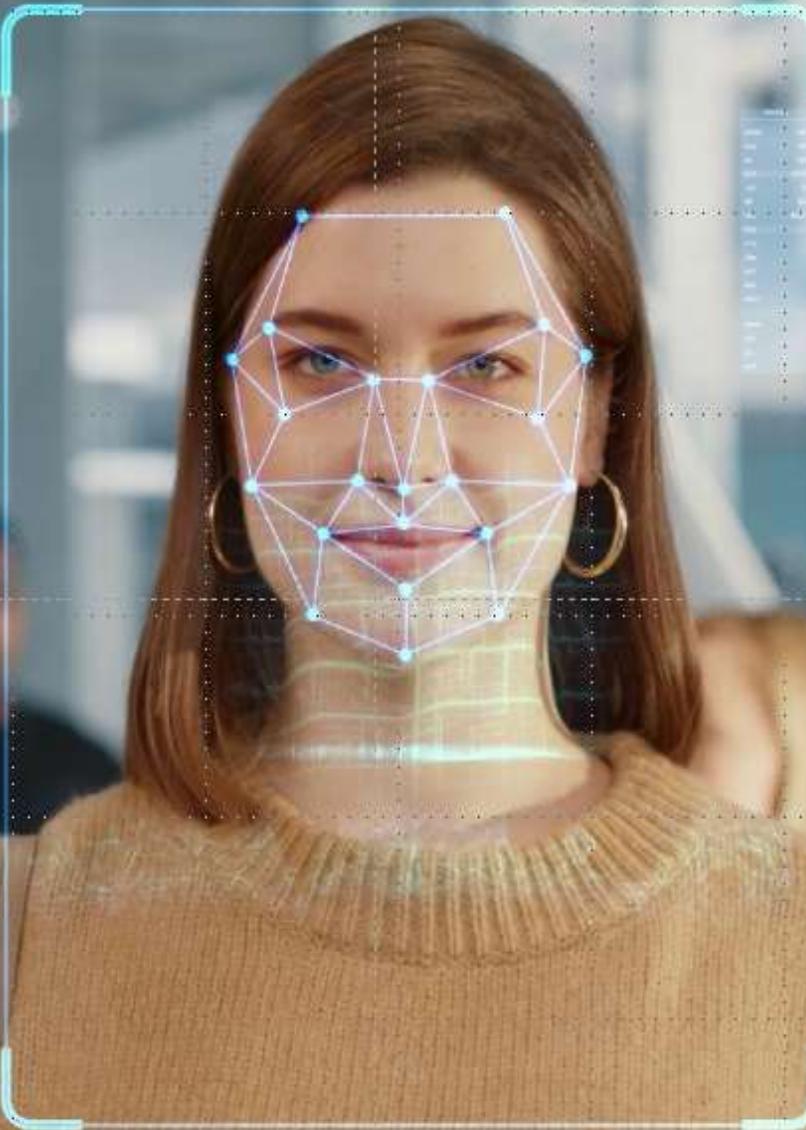
Digital Transformation with Practical Solutions





AF-S
OFF

A



FPS60

00:07:43:13





CO₂

MIN

MAX

100

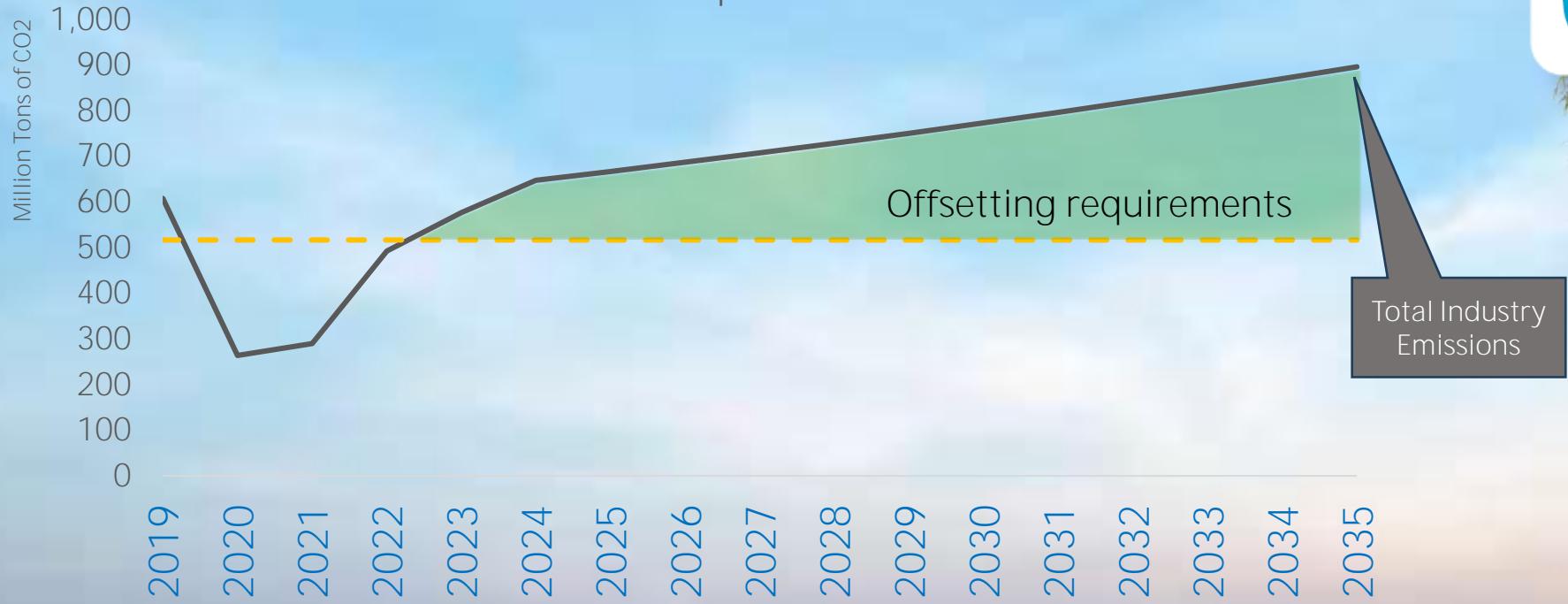


The logo consists of the word "CORSIA" in a large, bold, blue sans-serif font. A stylized green globe with a white airplane icon is integrated into the letter "O". The entire logo is set against a white rounded rectangular background.





Emissions Forecast Compared to CORSIA Baseline for International Operations





517 MtCO₂





الهدف البيئي الطموح الطويل الأجل

Long-Term Aspirational Goal



تخفيض الى صفر انبعاثات كربونية صافية

Achieving net zero CO₂ emissions

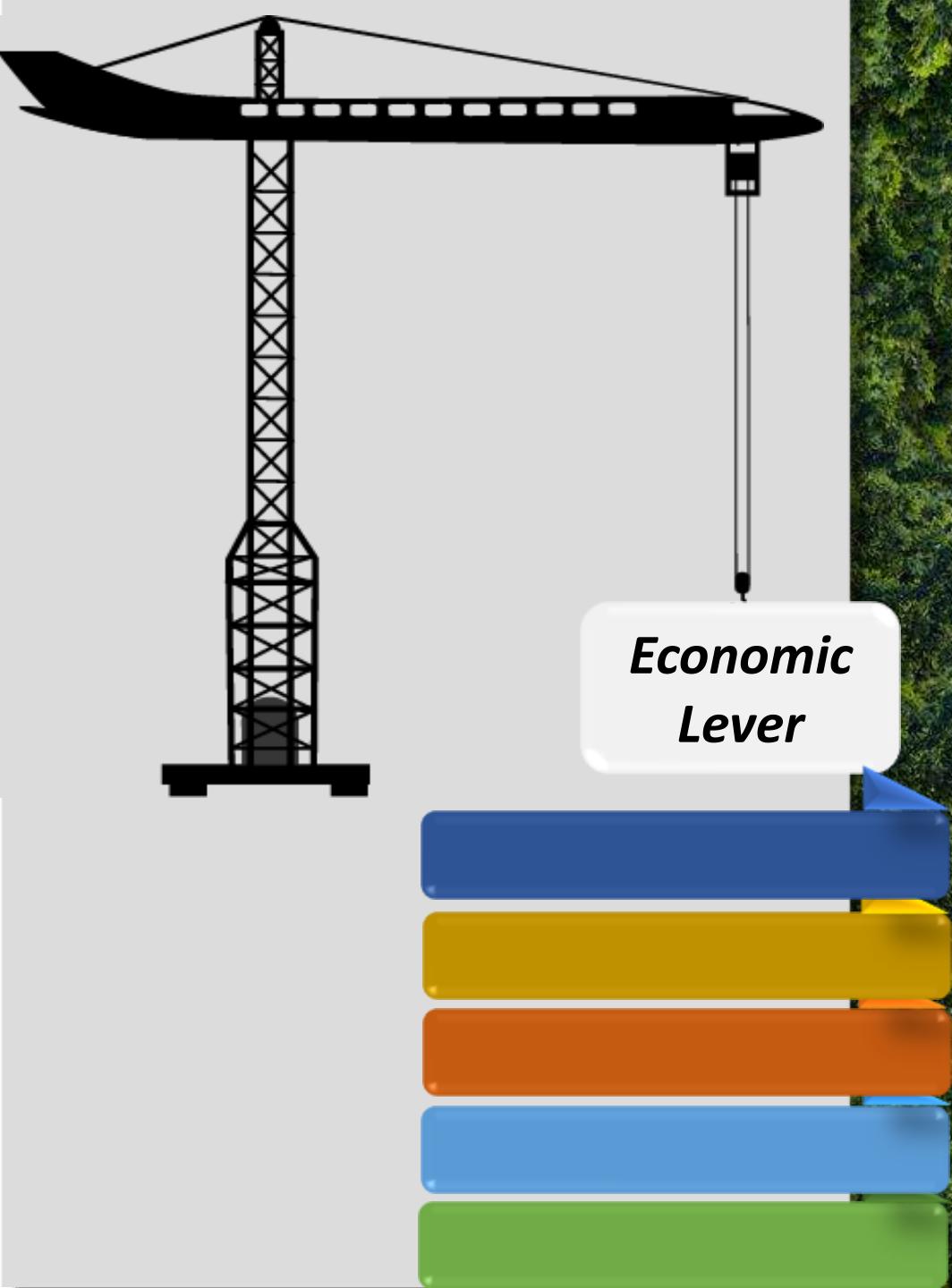
A photograph of a single, mature tree standing in a field of tall, golden grass under a bright blue sky with scattered white clouds.

CO₂



2





ICAO Member States Agreed

Carbon Neutral Growth from 2020 and beyond through CORSIA

2020

2040

2050

2035

The only measures for AVIATION

Long Term Aspirational Goal of Net Zero Carbon Emissions





Resolution A48-20: Consolidated statement of continuing ICAO policies and practices related to environmental protection – Climate change

Wherever ICAO and its Member States recognize the critical importance of providing continuous leadership to international civil aviation in facilitating or reducing its emissions that contribute to global climate change.

Reaffirming the vital role which international aviation plays in global economic and social development and the need to ensure that international aviation continues to develop in a sustainable manner;

Acknowledging that the work of the Organisation on the environment contributes to 5% of the 17 United Nations Sustainable Development Goals (SDGs), including SDG 13 “Take urgent action to combat climate change and its impacts”;

Wherever a comprehensive assessment of aviation's impacts on the atmosphere is contained in the special report on *Aviation and the Global Atmosphere*, published in 1999, which was prepared at ICAO's request by the Intergovernmental Panel on Climate Change (IPCC);

Wherever the IPCC special report indicated that the effects of some types of aircraft emissions are well understood, but the effects of other types of aircraft emissions are not well understood, in any area of scientific uncertainty that limit the ability to project aviation's full impacts on climate and where the Organisation will update the information contained in the IPCC special report;

Acknowledging that international aviation emissions continue to account for less than 2 per cent of total global CO₂ emissions and they are projected to increase as a result of the continued growth of air transport, unless action for emissions reduction is taken;

Wherever the ultimate objective of the United Nations Framework Convention on Climate Change (UNFCCC) is to achieve stabilization of greenhouse gas (GHG) concentrations in the atmosphere at a level that would prevent dangerous anthropogenic interference with the climate system;

Wherever the Kyoto Protocol, which was adopted by the Conference of the Parties to the UNFCCC in December 1997 and entered into force on 16 February 2005, calls for developed countries (Annex I Parties) to participate in reduction of greenhouse gases from “aviation bunker fuels” (international aviation) through ICAND (Article 22);

Wherever the Paris Agreement, which was adopted by the Conference of the Parties to the UNFCCC in December 2015, reinforces the objectives of the UNFCCC, including its objective, and aims to strengthen the global response to the threat of climate change, in the context of sustainable development and efforts to eradicate poverty, including by holding the increase in the global average temperature to well below 2°C above pre-industrial levels and pursuing efforts to limit the temperature increase to 1.5°C above pre-industrial levels, recognizing that this would significantly reduce the risks and impacts of climate change; and the Paris Agreement. The Paris Agreement finds the impacts of climate change will be much lower at the temperature increase of 1.5°C compared with 2°C and resolves to pursue efforts to limit the temperature increase to 1.5°C;

Resolution A48-19: Consolidated statement of continuing ICAO policies and practices related to environmental protection – Carbon Offsetting and Reduction Scheme for International Aviation (COPRI)

Wherever Assembly Resolution A48-17 invited to develop a global environmental measure (GEM) scheme for international aviation, as directed by the 97th Session of the Assembly;

Recalling that Assembly Resolution A48-10 requested the Council, with the support of Member States, to clarify the scope, issues and problems, including the Member States, and make a recommendation on a COPRI scheme that appropriately addresses them and very design elements, including the role of the ICAO and the role and responsibilities of the Member States, and the mechanism for the implementation of the scheme from ICAO as part of a global framework which clarifies techniques, operational improvements, and sustainable aviation fuels to achieve ICAO's global environmental goals;

Wherever Assembly Resolution A48-17 invited to implement a GEM scheme in the form of the Carbon Offsetting and Reduction Scheme for International Aviation (COPRI) as part of a set of measures which include aircraft technologies, operational improvements, and sustainable aviation fuels to achieve ICAO's global environmental goals;

Recalling that ICAO is the appropriate forum to address emissions from international aviation, and the significant extent of work undertaken by the Council, an Advisory Group on COPRI, IACG, Technical Advisory Study (TAS) and ICAO Committee on Aviation International Protection (CIAP) in respect of implementation of COPRI;

Recalling the adoption of the first edition of Annex 16 – Environment Protection, Volume IV – Criteria for the promotion of aircraft noise Monitoring, Reporting and Verification (MRV) procedures for COPRI;

After consulting the publication of the first edition of Environmental Technical Manual (ETM), Doc 9701, Volume IV – Procedures for demonstrating compliance with the COPRI;

Following the progress made for the development of ICAO COPRI Implementation Elements, which are reflected in ICAO MRV documents directly referenced in Annex 16, ICAO MRV, containing materials that are approved by the Council, and are intended for the implementation of COPRI;

After reviewing the contribution for the Union of the Nations of African States (U.N.A.S.) with its members to consider recommendations to the Council on the COPRI slight revision notice;

Recalling the importance of a coordinated approach for capacity building activities by ICAO and its Member States, to cooperate with the aviation industry, to support the implementation of COPRI, in particular through the ICAN Assessment, Capacity Building and Training in COPRI (ICB&T) COPRI, and the ICAO COPRI Performance Monitoring System;

Recognizing the increasing number of assessments by Member States of their intention to voluntarily provide data to COPRI as the pilot phase from 2021;

Recalling that strong capacity building activities can facilitate the success of Member States in advancing participation in COPRI;

EU ETS



Refuel EU











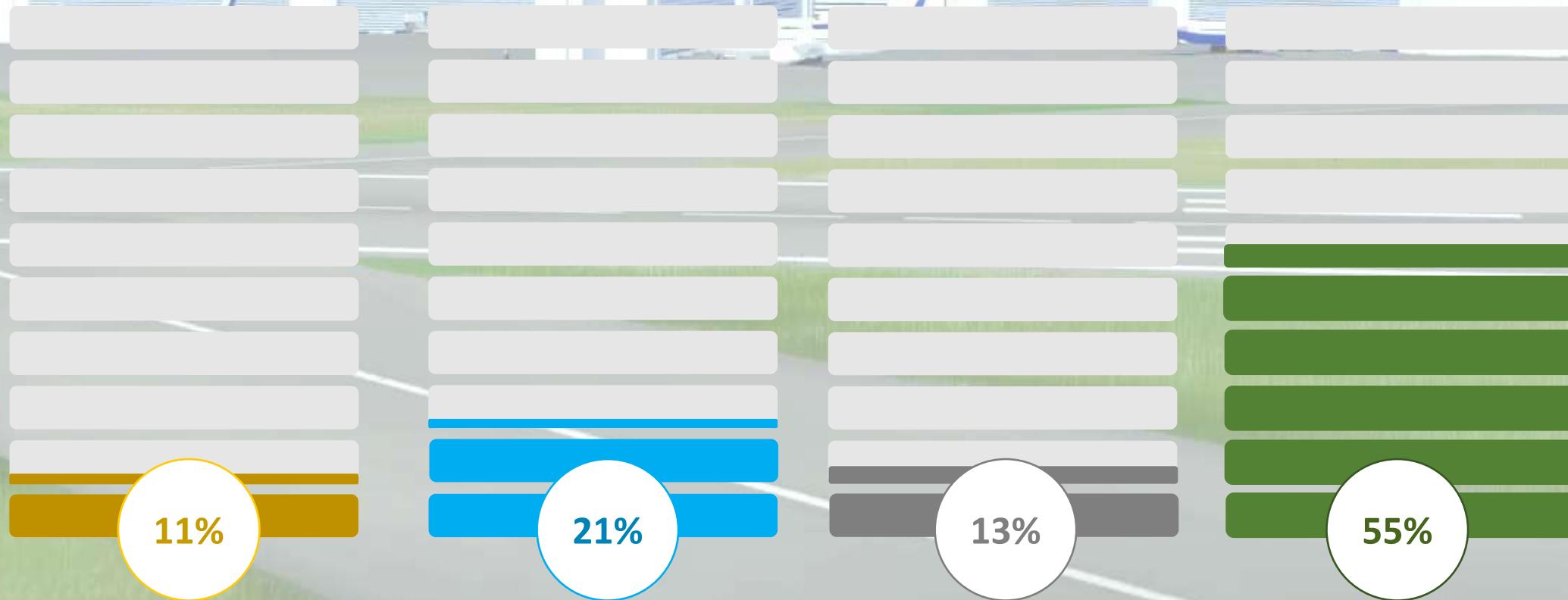


Infrastructure and Operational Efficiencies

Technology

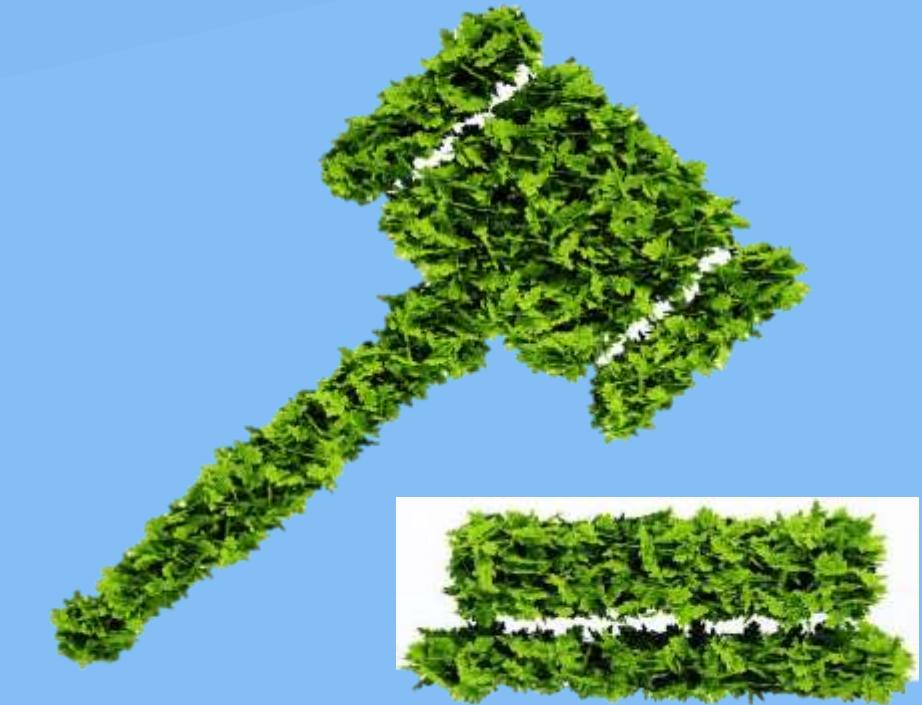
Offsets/Residuals

SAF/LCAF





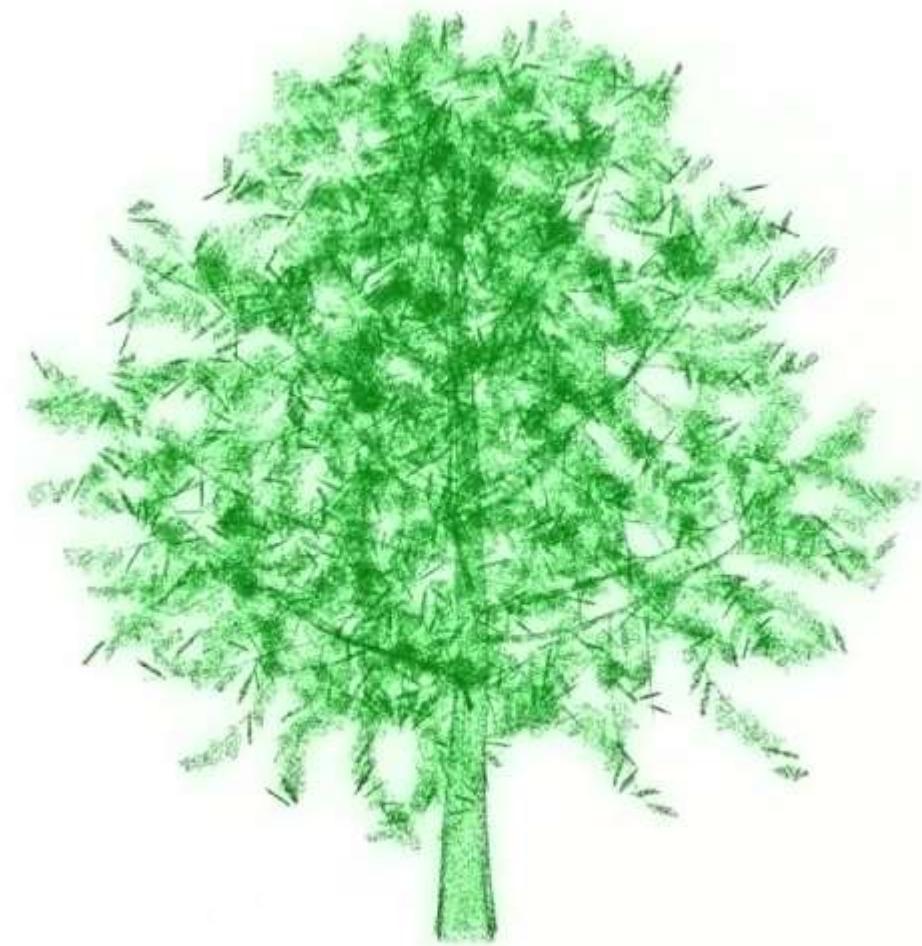








COT





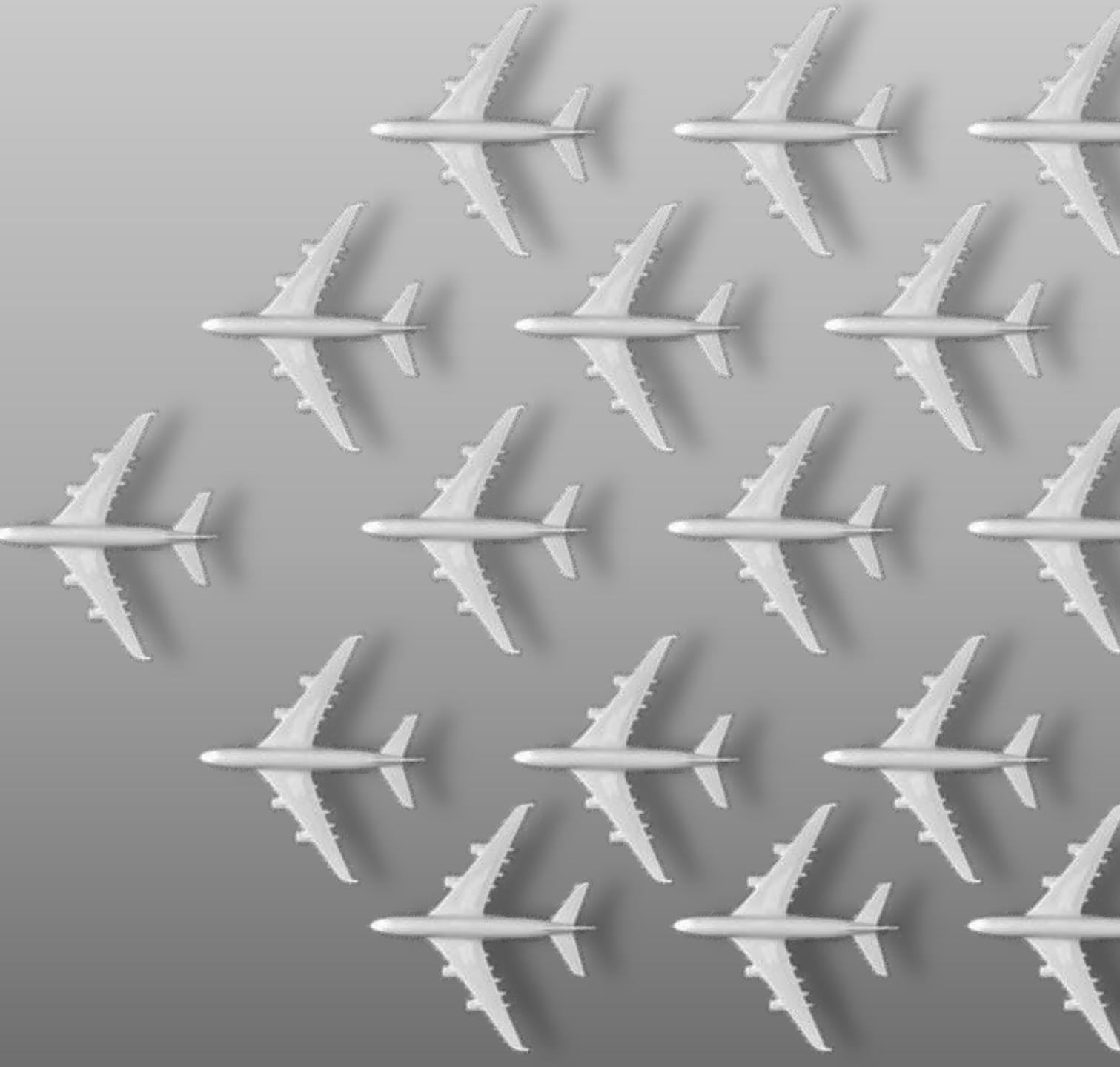


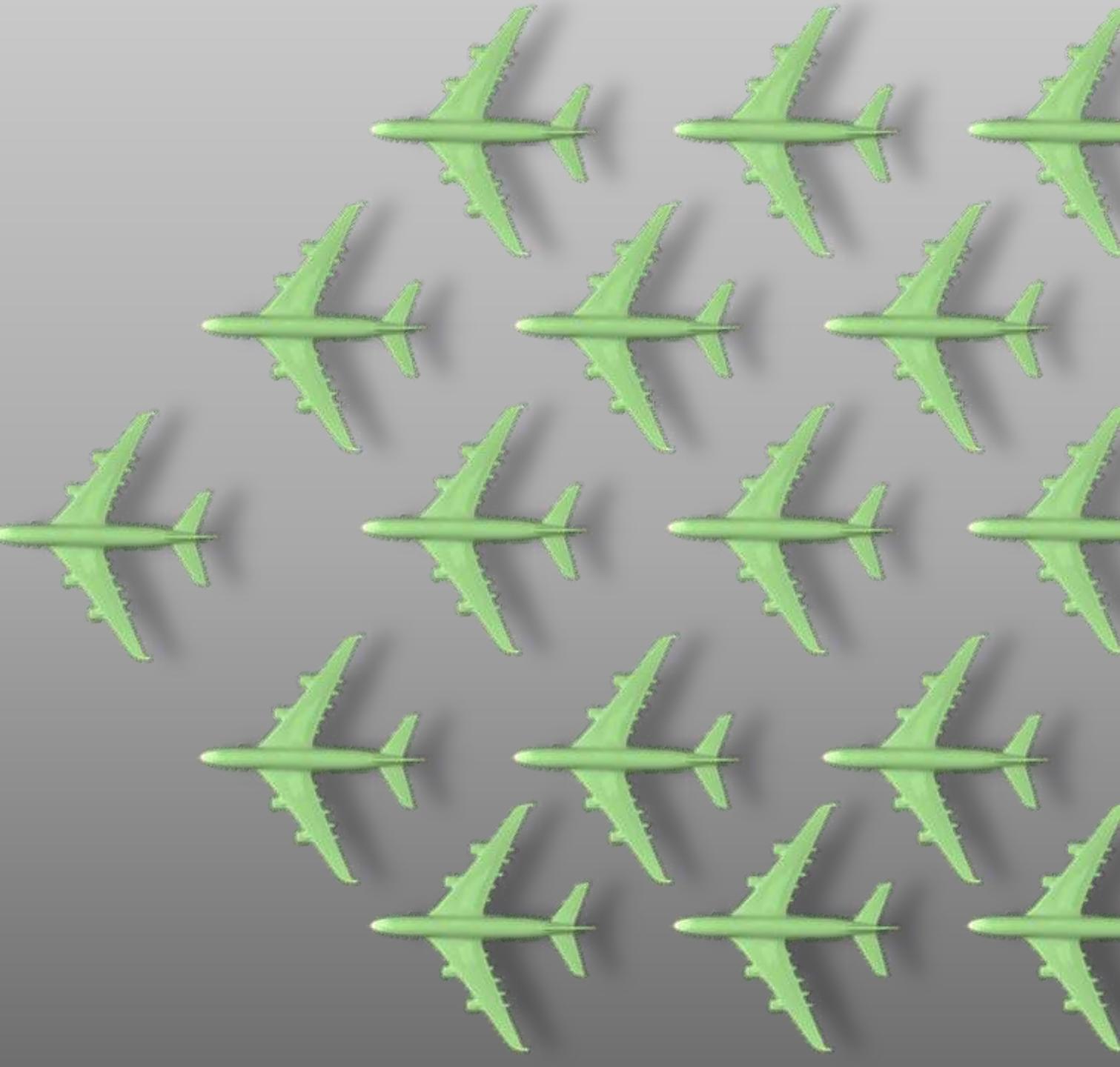


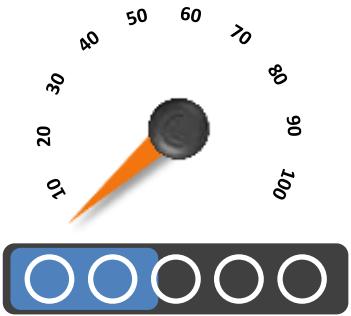
ZERO EMISSIONS



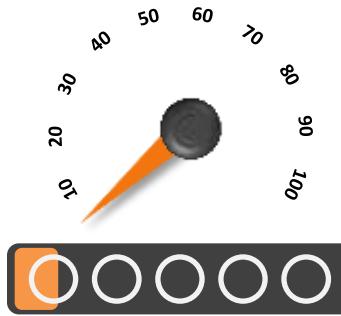
CORSIA



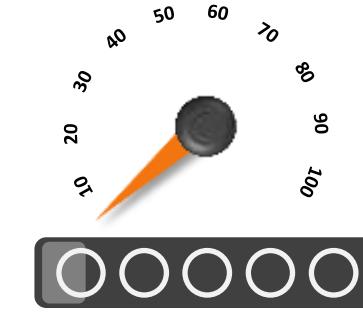




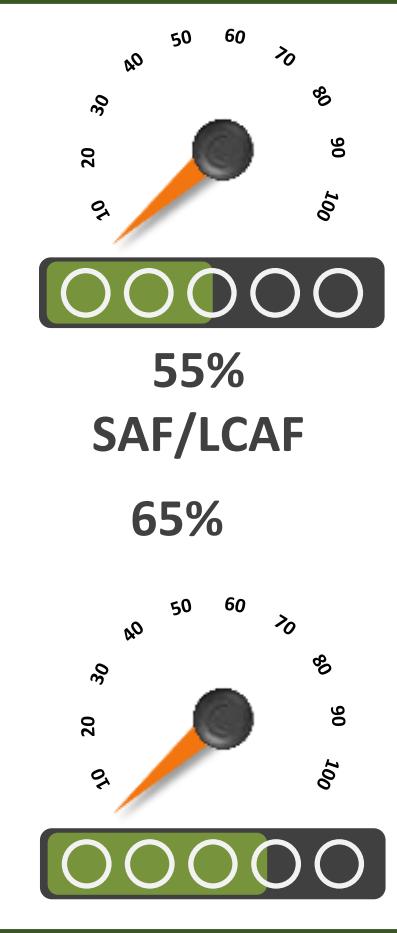
21%
Technology



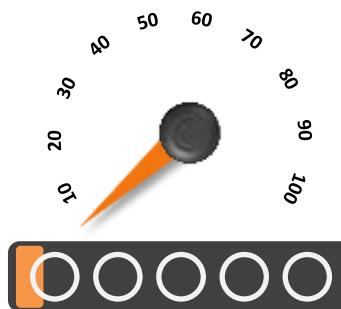
11%
Infrastructure



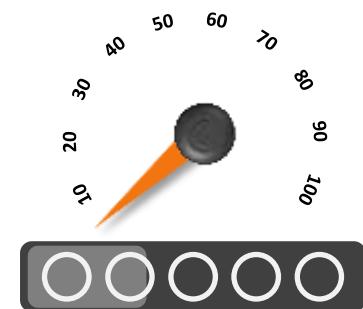
13%
Offsets/Residuals



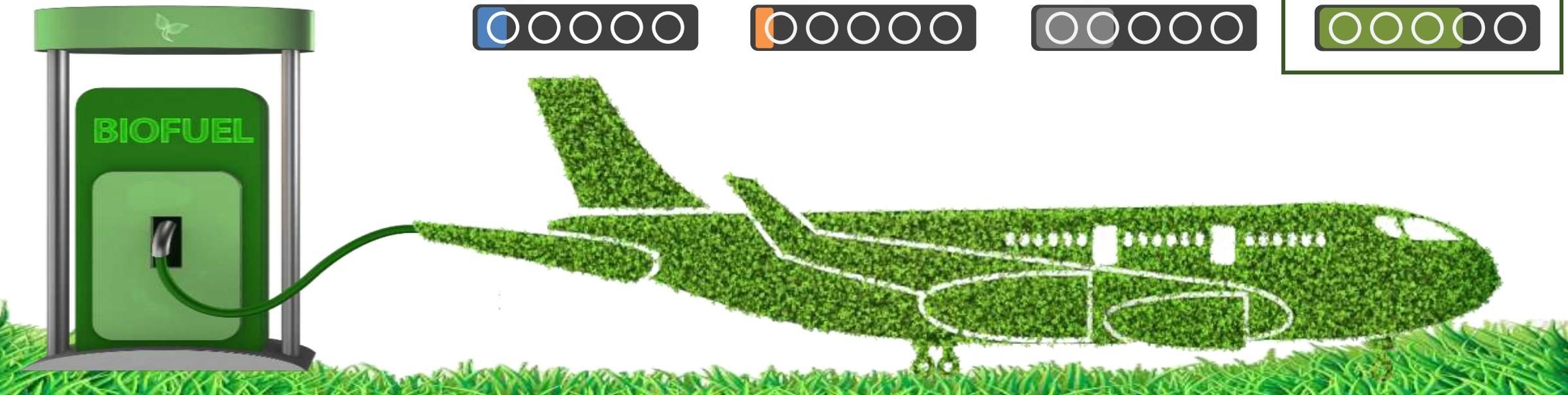
13%



3%



19%



BIO

وضع محفّزات
Incentives



BIO



وضع تكاليفات
Mandates











المؤتمر الثالث للايكاو حول وقود الطيران المستدام

ICAO's Third CAAF / 3 Conference



لتعزيز انتاج الطاقة الأكثـر نظافة للطيران

To produce cleaner energies

تبني سياسات داعمة لإنتاج واستخدام وقود الطيران المستدام والمنخفض الكربون تكون مبنية على الحوافز، بدلاً من فرض ضرائب أو عقوبات مالية أو فرض تكاليف تحديد نسب استخدام وقود الطيران المستدام

To adopt policies supporting the production and the use of SAF and LCAF, built upon incentives, instead of taxes, penalties, or mandates.



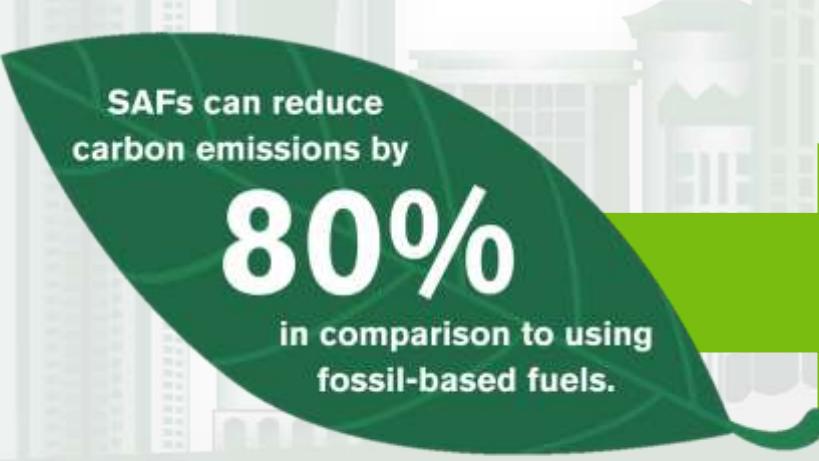
Policies Be Built Upon
Incentives

Instead of



إن أي تخفيف في الانبعاثات ينتج عن استخدام شركات الطيران لوقود طيران مستدام أو منخفض الكربون يجب أن يسجل لتلك الشركات لرحلاتها ضمن أي برنامج، إن كان كورسيا أو غيره، مع تفادي احتساب هذا التخفيف أكثر من مرة.

Any reduction in emissions from the use of SAF and LCAF needs to be credited to the airlines in whichever program they are operating under, while avoiding double counting.



SAFs can reduce carbon emissions by
80% in comparison to using fossil-based fuels.



إنشاء آلية عالمية لاحتساب وقود الطيران المستدام يسمح لشركات الطيران بشراء هذا الوقود من مكانٍ ما لاستخدام شهادات تخفيضه للانبعاثات في مكانٍ آخر

To create an international mechanism of accounting for the use of SAF to enable SAF to be purchased by any airline anywhere in the world



الاتفاق على توحيد معايير شهادات وقود الطيران المستدام من أجل تسهيل إجراءات الاعتراف بتحفيض الانبعاثات عند استخدام شركات الطيران لوقود الطيران المستدام أو الوقود المنخفض الكربون ضمن أي برنامج.

To agree on the standardization of SAF certificates in order to facilitate the recognition of reductions in emissions when SAF and LCAF are used by airlines



ISCC EU



ISCC GLOBAL



ISCC CORSIA



Executive Committee

Chairman

H.E. Eng. Ibrahim Al Omar



Eng. Yehia
Zakaria



Mr.
Antonoaldo
Neves



Mr. Bander
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Mr.
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H.E. Mr.
Akbar
Al Baker



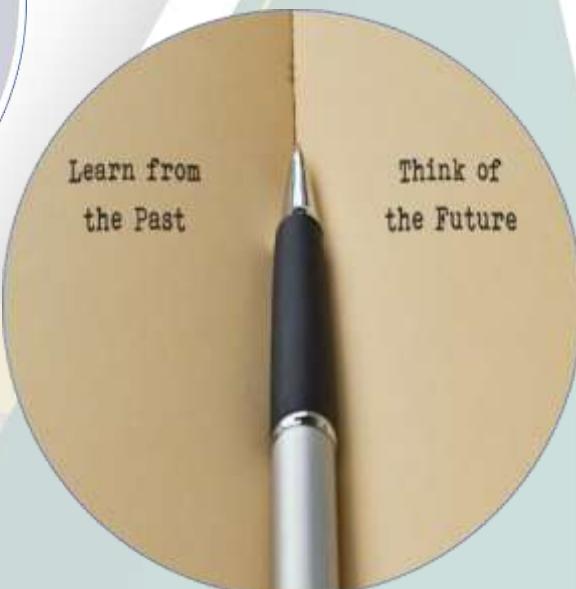
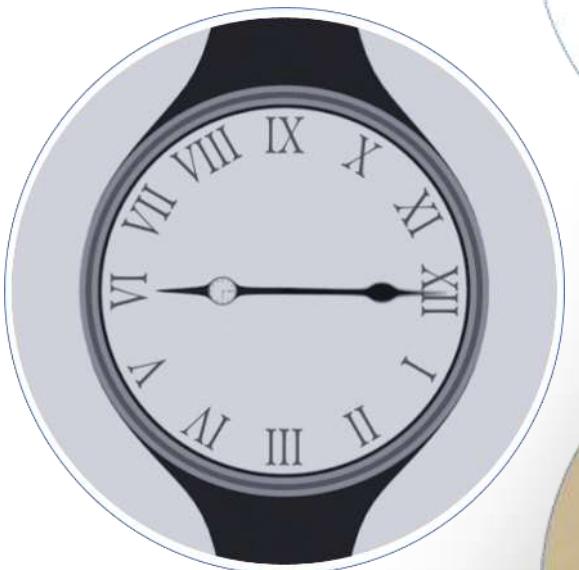
Mr.
Abdelhamid
Addou



Mr. Khaled
Chelly



Eng. Samer
Majali



رؤساء الشركات الأعضاء

CEOs of AACO Members



Partner Airlines

شركات الطيران الشريكة



A STAR ALLIANCE MEMBER

شركاء في الصناعة

Industry Partners



accelya

AIRBUS



ALTON
AVIATION CONSULTANCY

amADEUS

ARABIAN
AEROSPACE

ATN
AIR TRANSPORT NEWS

ATR

Bloomberg

BOC AVIATION

BOEING

CAPA
CENTRE FOR AVIATION

cfm
The Power of Flight

CIRIUM
aviation analytics

Collins Aerospace
An RTX Business

EMBRAER

elfc

FLIGHT
SAFETY
FOUNDATION

FL Y R

GE

HERMES
AIR TRANSPORT ORGANISATION

Hitit

ibsssoftware

JEPPESSEN
A BIZLIC COMPANY

KENYON
EMERGENCY SERVICES

IK KNIGHTHOOD
GLOBAL

Lufthansa
Consulting

Lufthansa Systems

MedAire.
An International SOS Company

minsait
An Indra company

OAG

PEATT & WHITNEY
GO BEYOND

ROLLS
ROYCE

Shell Aviation

SITA

SmartKargo

THALES
Building a future we can all trust

tpc

wtw

Zamna.

International & Regional Organizations



الإتحاد العربي للنقل الجوي
arab air carriers' organization



رافعة أساسية للاقتصاد



Economic lever

المنظّمات والاتّحادات الإقليميّة والدّوليّة

ومحفز لفرص العمل



Catalyst for Job
Creation

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الرّعَاة

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Sponsor of the Opening Dinner



RIYADH AIR
طيران الرياض



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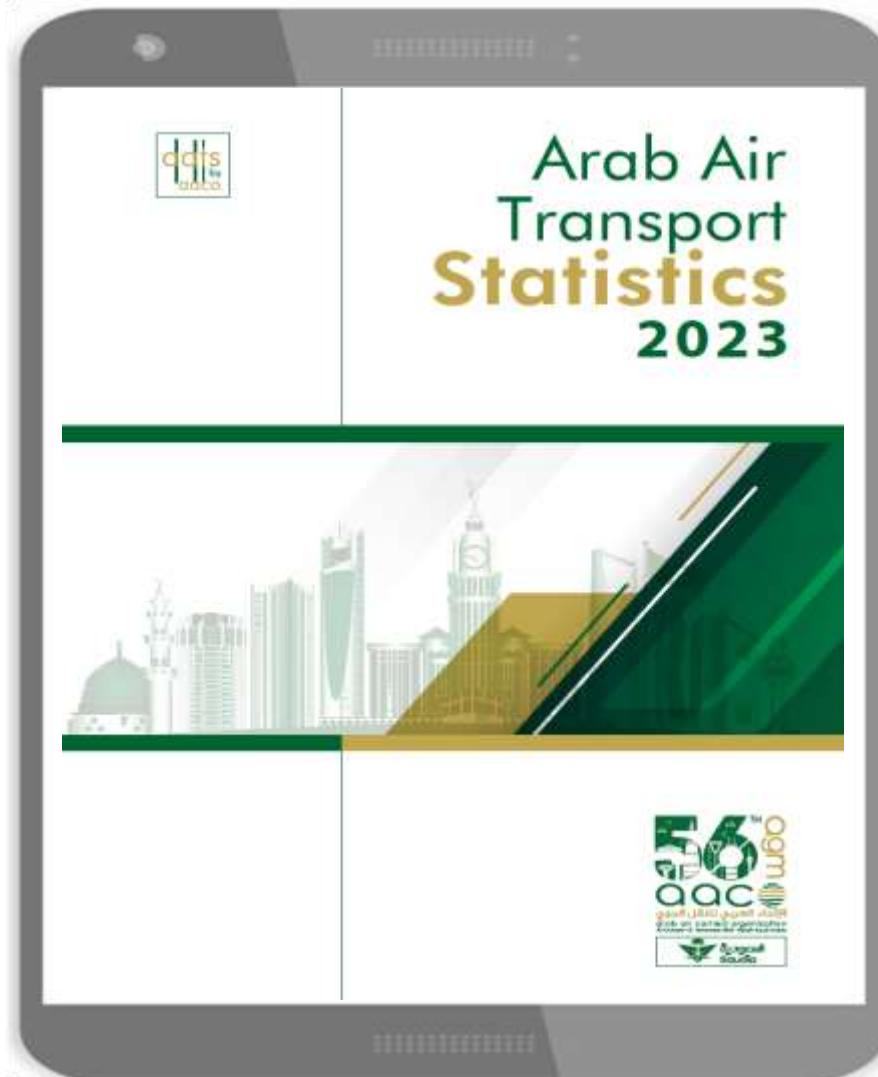
Bronze Sponsor



EMERGENCY SERVICES

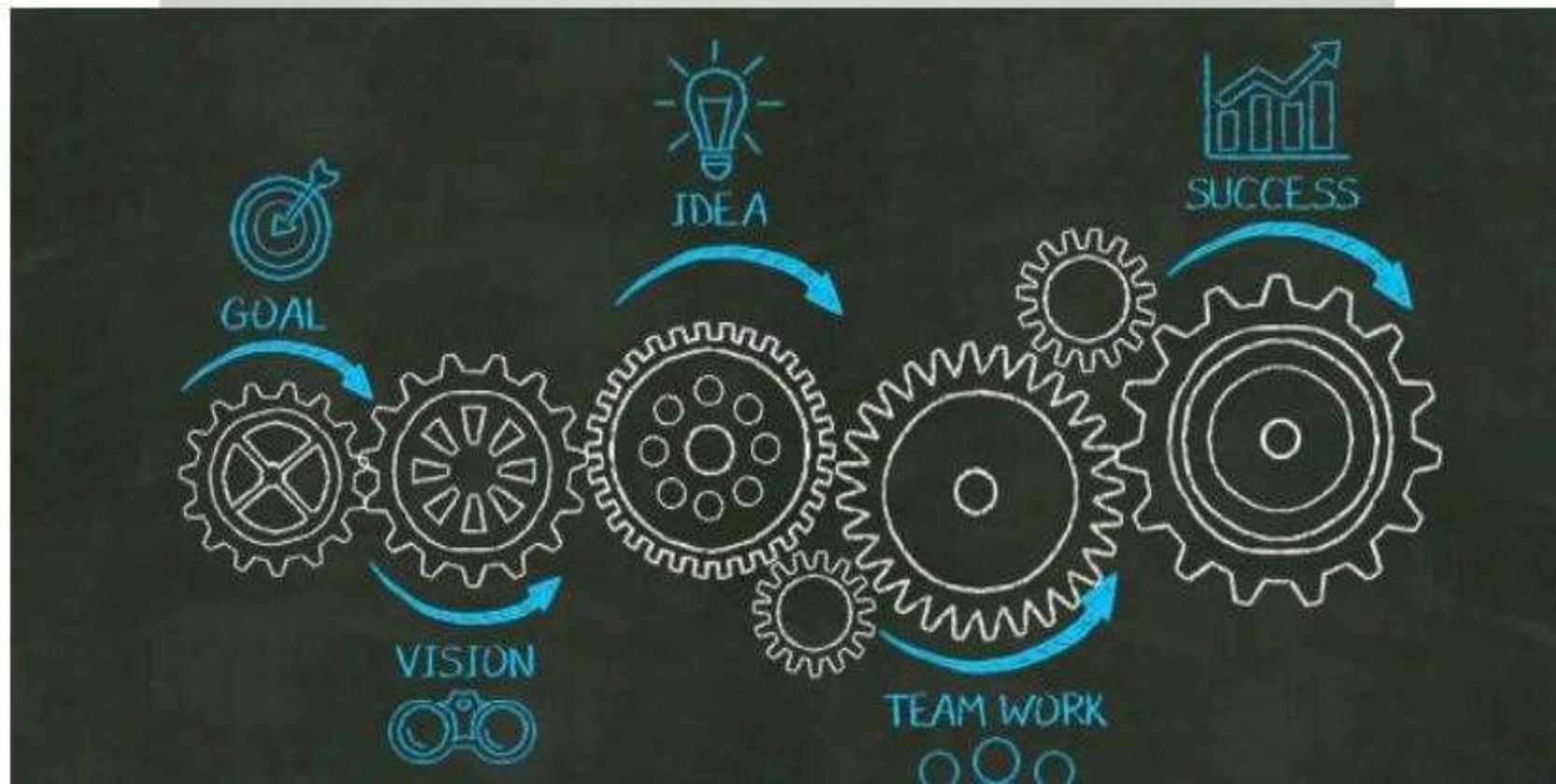
النشرة السنوية لـإحصاءات النقل الجوي
Arab Air Transport Statistics

التقرير السنوي للاتحاد
AACO Annual Report



نعتز دائمًا بخدمتكم

We are always proud to serve you





وشكراً
THANK YOU