2 - 4 November 2026

aac

الإتحاد العربي للنقل الجوي

arab air carriers' organization

الجمعية العامة التاسعة والخمسين

59TH AGM

Doha

State of The Industry حـــال الصنـــاعـــة

Abdul Wahab Teffaha
Secretary General

عبـد الوهـاب تفـاحة
الأميـن العـام



2 - 4 November 2026

aac

الإتحاد العربي للنقل الجوي

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59TH AGM

Doha



QATAR AIRWAYS القطرية





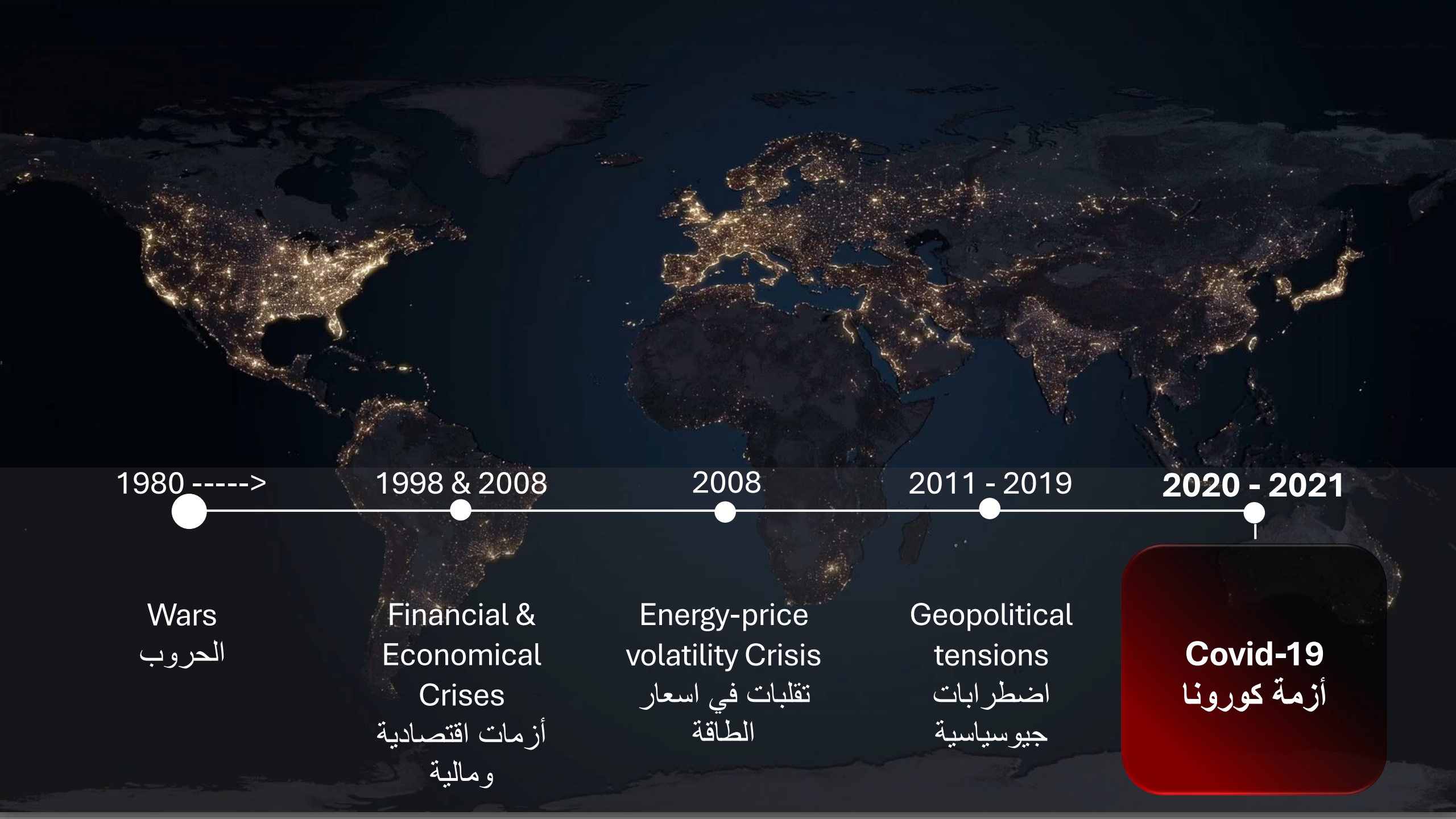



1980 ----->
Wars
الحروب

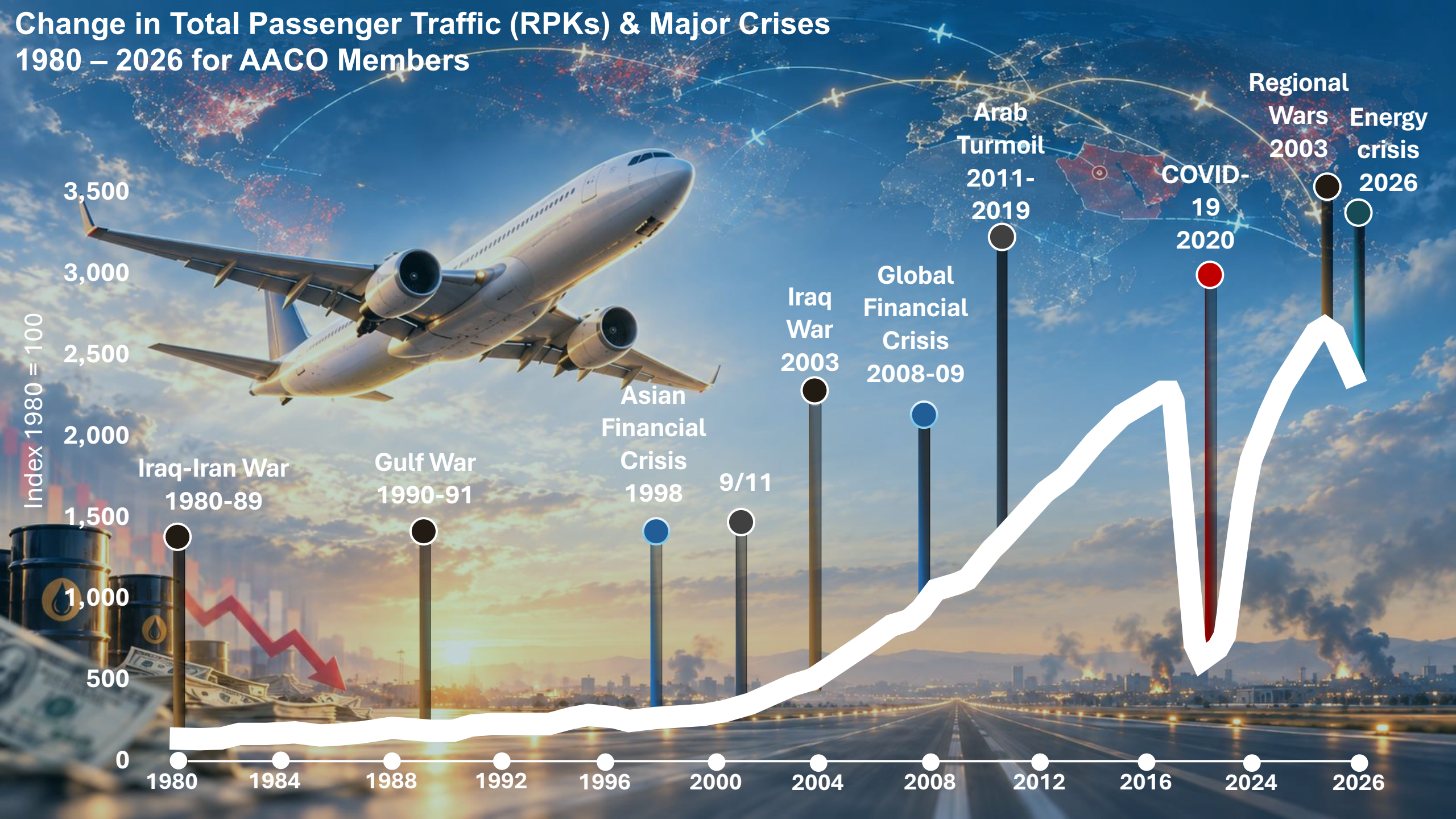

1980 ----->
1998 & 2008
Wars
الحروب
Financial & Economical Crises
أزمات اقتصادية ومالية


1980 ----->
1998 & 2008
2008
Wars
الحروب
Financial & Economical Crises
أزمات اقتصادية ومالية
Energy-price volatility
تقلبات في اسعار الطاقة


1980 ----->
1998 & 2008
2008
2011 - 2019
Wars
الحروب
Financial & Economical Crises
أزمات اقتصادية ومالية
Energy-price volatility
تقلبات في اسعار الطاقة
Geopolitical tensions
اضطرابات جيوسياسية


1980 -----> Wars الحروب
1998 & 2008 Financial & Economical Crises أزمات اقتصادية ومالية
2008 Energy-price volatility Crisis تقلبات في اسعار الطاقة
2011 - 2019 Geopolitical tensions اضطرابات جيوسياسية
2020 - 2021 Covid-19 أزمة كورونا

Change in Total Passenger Traffic (RPKs) & Major Crises 1980 – 2026 for AACO Members



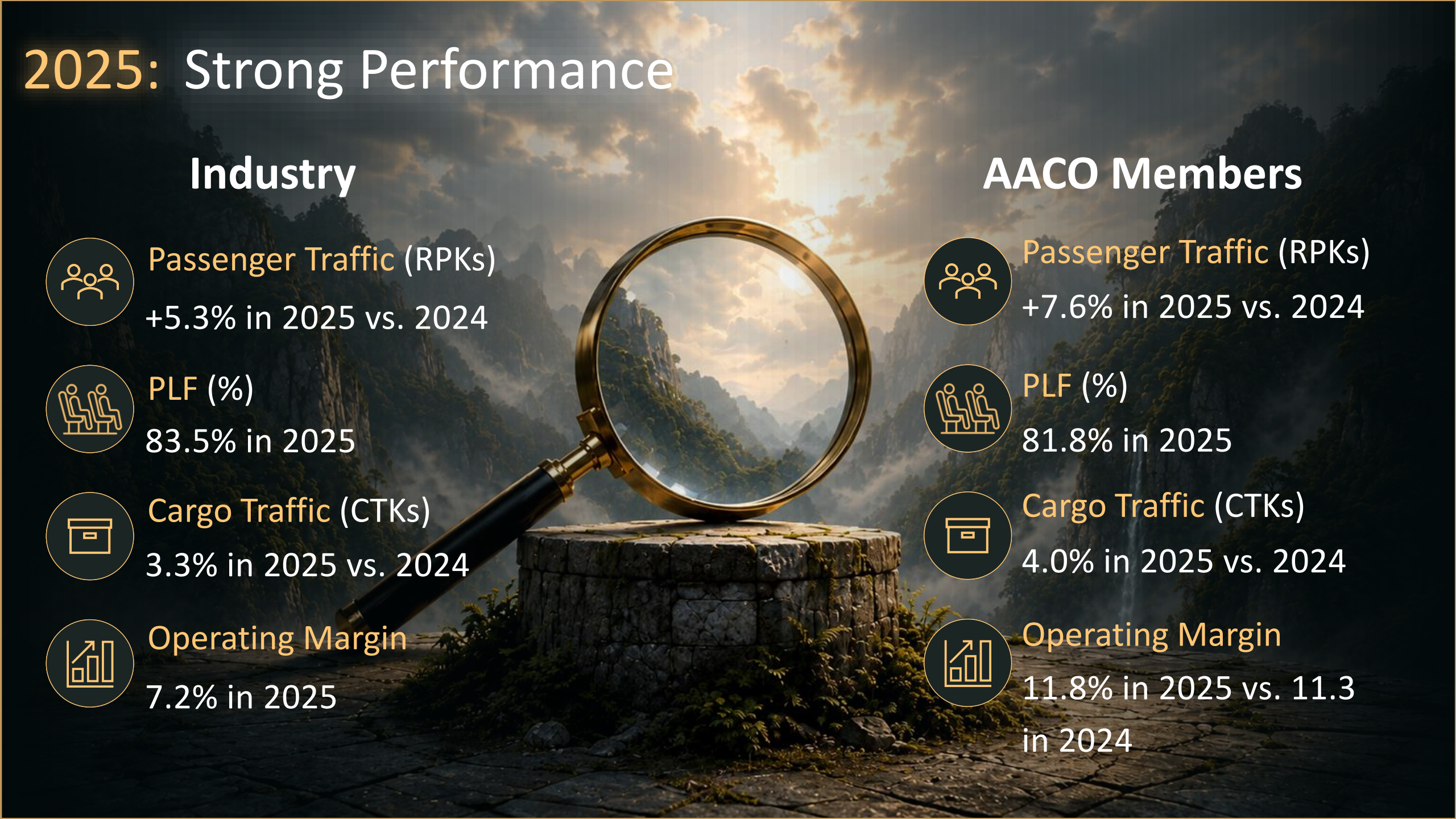



1980 vs. 2025
Arab Airlines Traffic Share
1980 vs. 2025
Operational Growth
1980 vs. 2025
Fleet Updates
2025
Strong Performance
2026
Weak Performance

2025

Strong Performance

2025: Strong Performance



Industry

Passenger Traffic (RPKs)
+5.3% in 2025 vs. 2024

PLF (%)
83.5% in 2025

Cargo Traffic (CTKs)
3.3% in 2025 vs. 2024

Operating Margin
7.2% in 2025

AACO Members

Passenger Traffic (RPKs)
+7.6% in 2025 vs. 2024

PLF (%)
81.8% in 2025

Cargo Traffic (CTKs)
4.0% in 2025 vs. 2024

Operating Margin
11.8% in 2025 vs. 11.3 in 2024

2026

Weak Performance

2026: Weak Performance



Industry

Passenger Traffic (RPKs)
+2.1% vs. 2025

Seat Capacity (ASKs)
+1.6% vs. 2025

PLF (%)
83.9% in 2026

Cargo Traffic (CTKs)
0.7% vs. 2025

Operating Margin
4.1% in 2026

AACO Members

Passenger Traffic (RPKs)
-10.3% vs. 2025

Seat Capacity (ASKs)
-4.7% vs. 2025

PLF (%)
77.0% in 2025

Cargo Traffic (CTKs)
-5.2% vs. 2025

Operating Margin
Strong surplus in 2025 to a deficit of -2.7%

1980 vs. 2025

Arab Airlines Traffic Share

1980 vs. 2025: Arab Airlines Growth

Arab Airlines Passenger Traffic as Share of the Industry



2% In 1980

10% In 2025

1980 vs. 2025

Operational Growth

1980 vs. 2025: Operational Growth

AACO Members

International Passenger Traffic

+1,645%

In 2025 vs. 1980

Cargo Traffic

+4,982%

In 2025 vs. 1980



Industry

International Passenger Traffic

+1,116%

In 2025 vs. 1980

Cargo Traffic

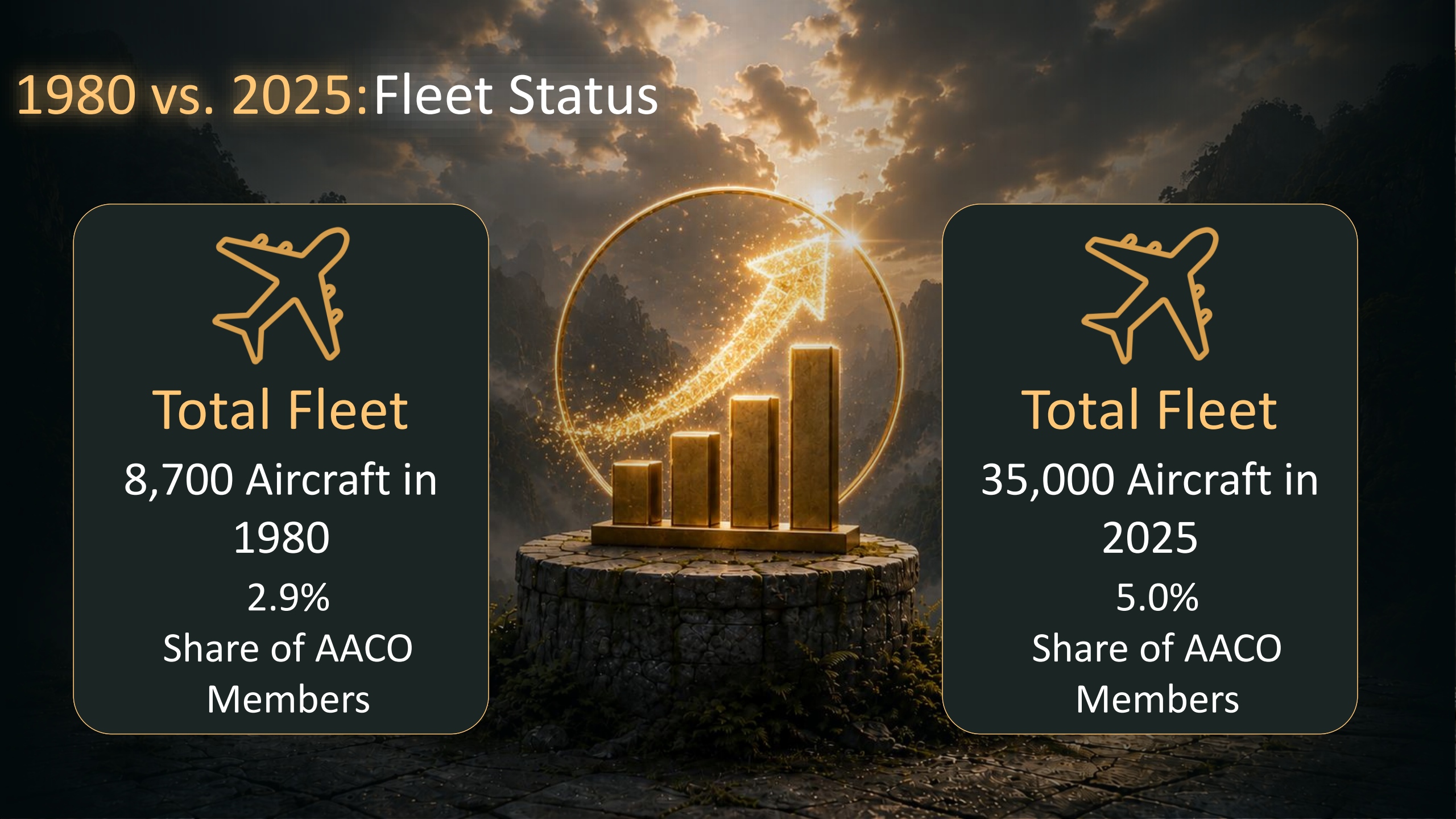
+1,128%

In 2025 vs. 1980

1980 vs. 2025

Fleet Updates

1980 vs. 2025: Fleet Status



Total Fleet

8,700 Aircraft in 1980

2.9%

Share of AACO Members

Total Fleet

35,000 Aircraft in 2025

5.0%

Share of AACO Members

نمو متواصل
Sustained Growth

الصمود أمام الأزمات
Resilience Through Crises

مكانة عالمية أقوى
Stronger Global Standing



RPKs 2 → 10 %

CTKs 3 → 13 %




الاستعداد للفرص يبدأ في قلب الأزمات
Preparing For Opportunities Begins At The Heart Of Crises



Travel and Tourism Contribution in the Arab Economy in 2025



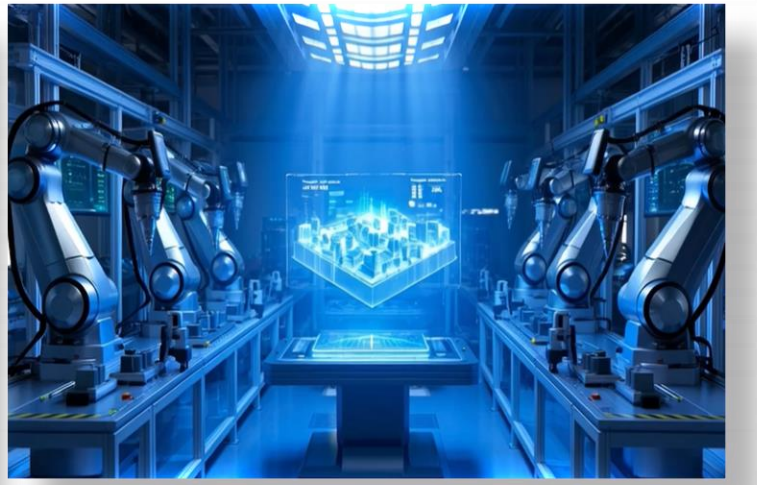
USD 411 Billion, 11.0%

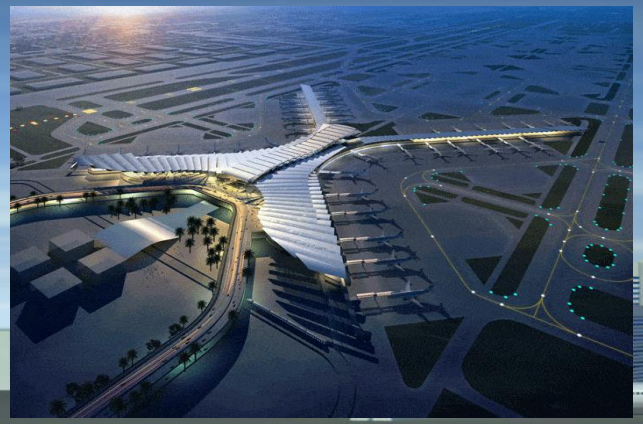
10.6 Million, 9.0%

136 Million Tourist Arrivals

USD 172 B Tourism Receipts



























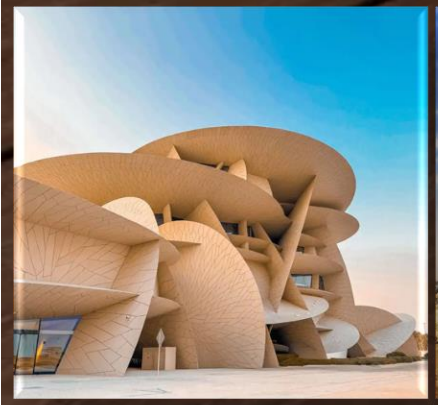
QATAR



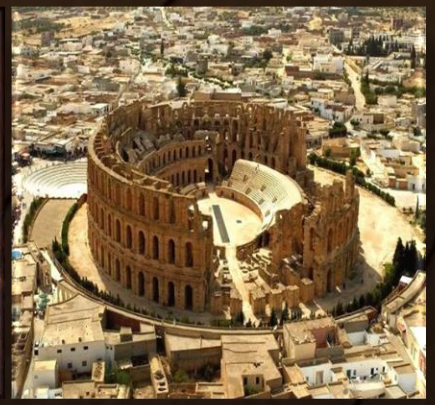






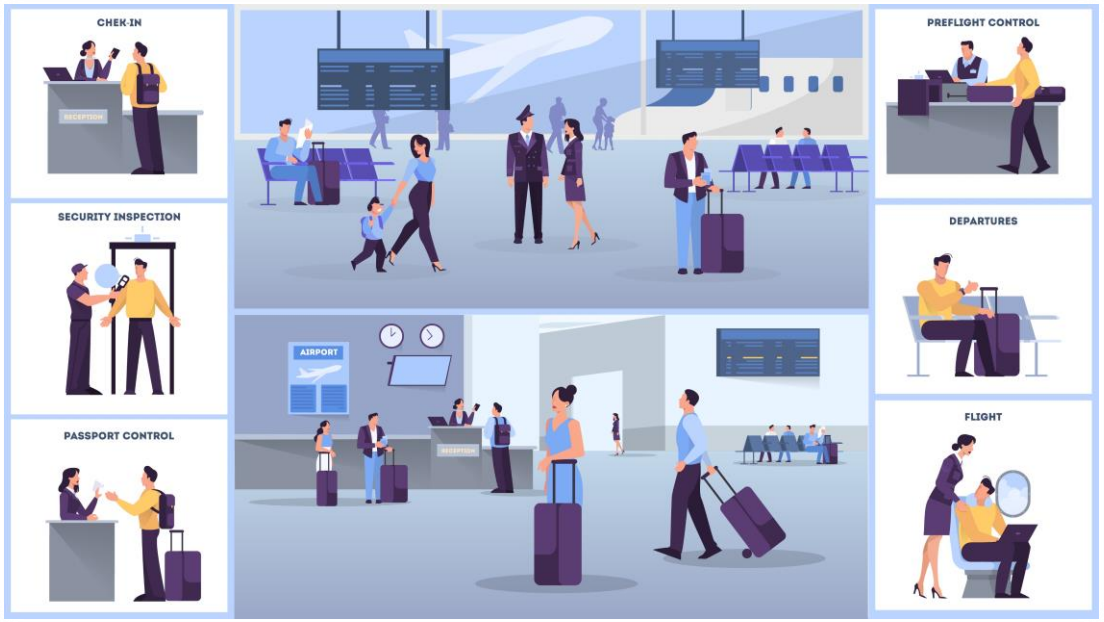









CHEK-IN
RECEPTION
SECURITY INSPECTION
PASSPORT CONTROL
PREFLIGHT CONTROL
DEPARTURES
FLIGHT
AIRPORT


A5

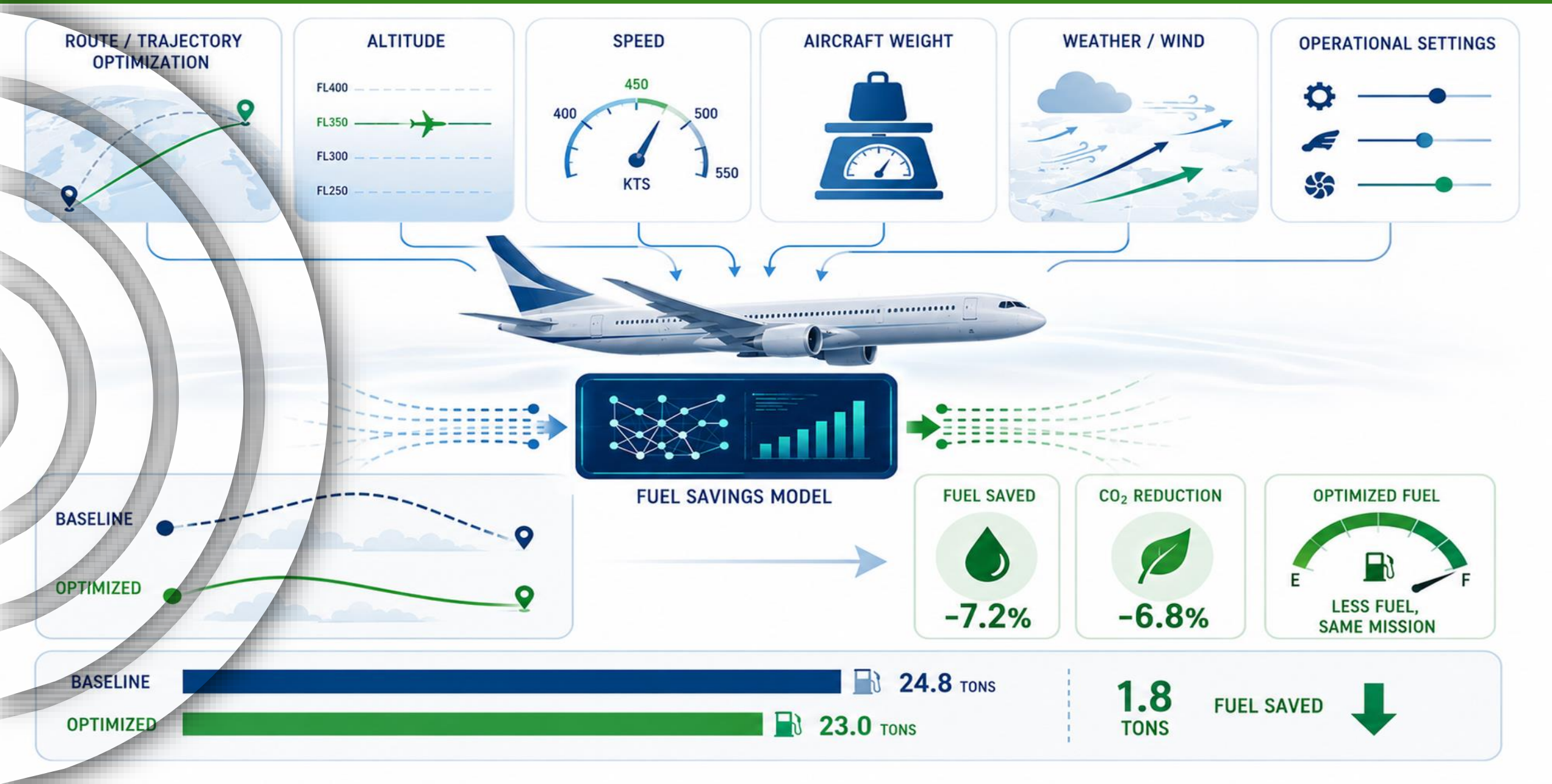

CARGO
A06


CO2


Net
Zero
Emission
By 2050
2
2020 | 2025 | 2030 | 2035 | 2040 | 2045 | 2050


إطار عالمي موحّد لوضع سقف
لانبعاثات النقل الجوي الدولي
A global framework to
cap international aviation
emissions
CORSIA
2050
الوصول الى صفر انبعاثات كربونية صافية
Achieving net zero CO2 emissions


ICAO • OACI • ИКАО
国际民航组织 • ايكاو


ROUTE / TRAJECTORY OPTIMIZATION
ALTITUDE
FL400
FL350
FL300
FL250
SPEED
400
450
500
550
KTS
AIRCRAFT WEIGHT
WEATHER / WIND
OPERATIONAL SETTINGS
FUEL SAVINGS MODEL
BASELINE
OPTIMIZED
FUEL SAVED
-7.2%
CO2 REDUCTION
-6.8%
OPTIMIZED FUEL
E
F
LESS FUEL, SAME MISSION
BASELINE
24.8 TONS
OPTIMIZED
23.0 TONS
1.8 TONS
FUEL SAVED



AIRCRAFT & ENGINE MANUFACTURERS







ADVANCED AERODYNAMICS → LIGHTWEIGHT DESIGN → MORE EFFICIENT ENGINES → **LOWER FUEL CONSUMPTION**


SAF
SAF





Net
Zero
Emission
By 2050









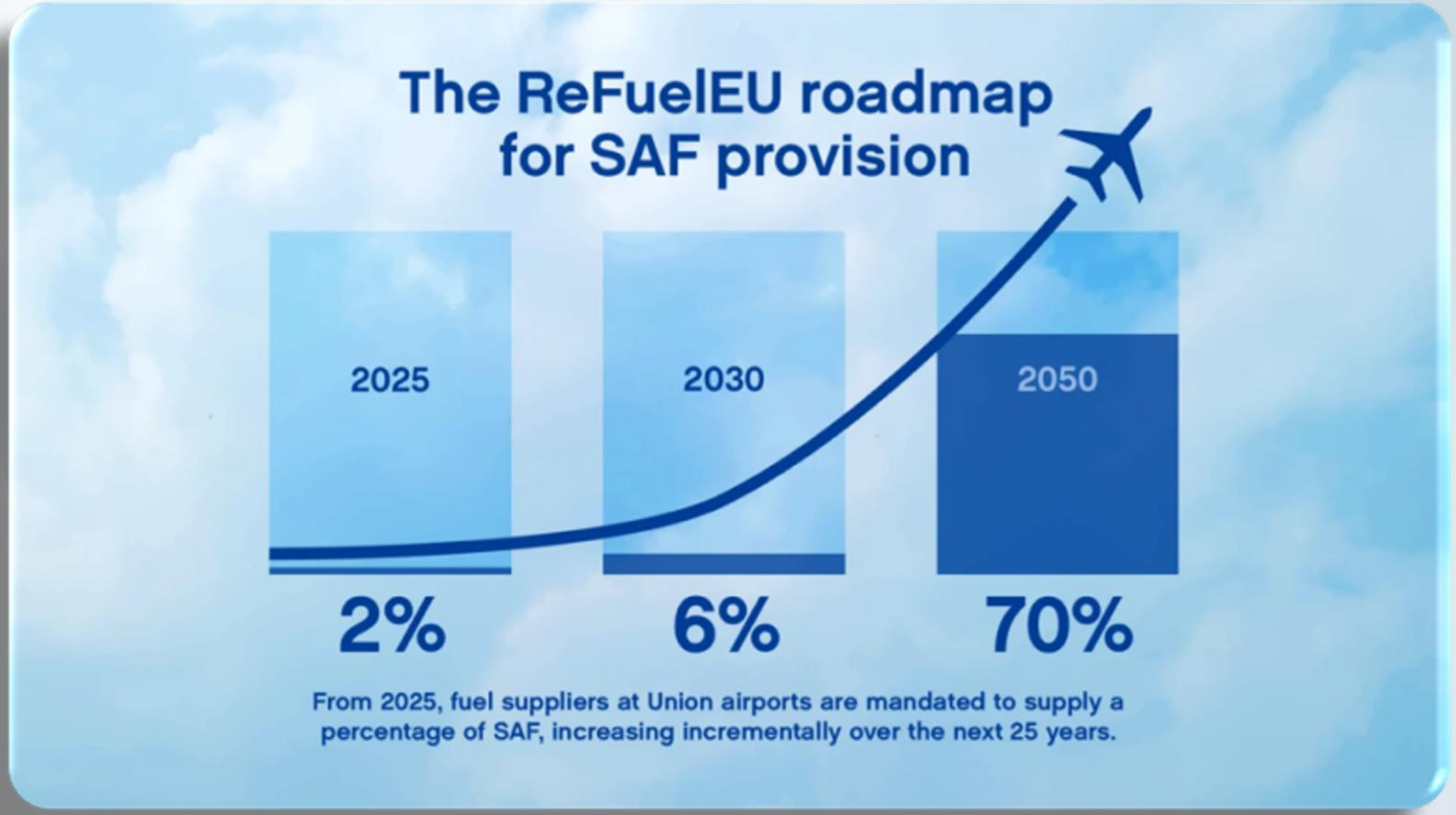

CO_2

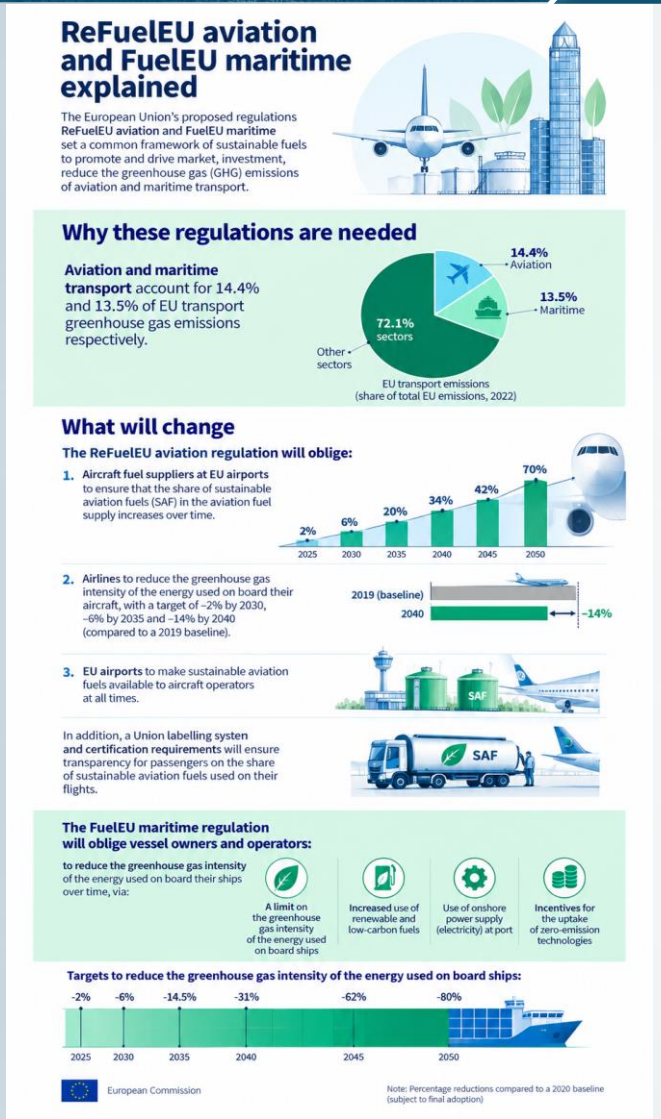
CORSIA

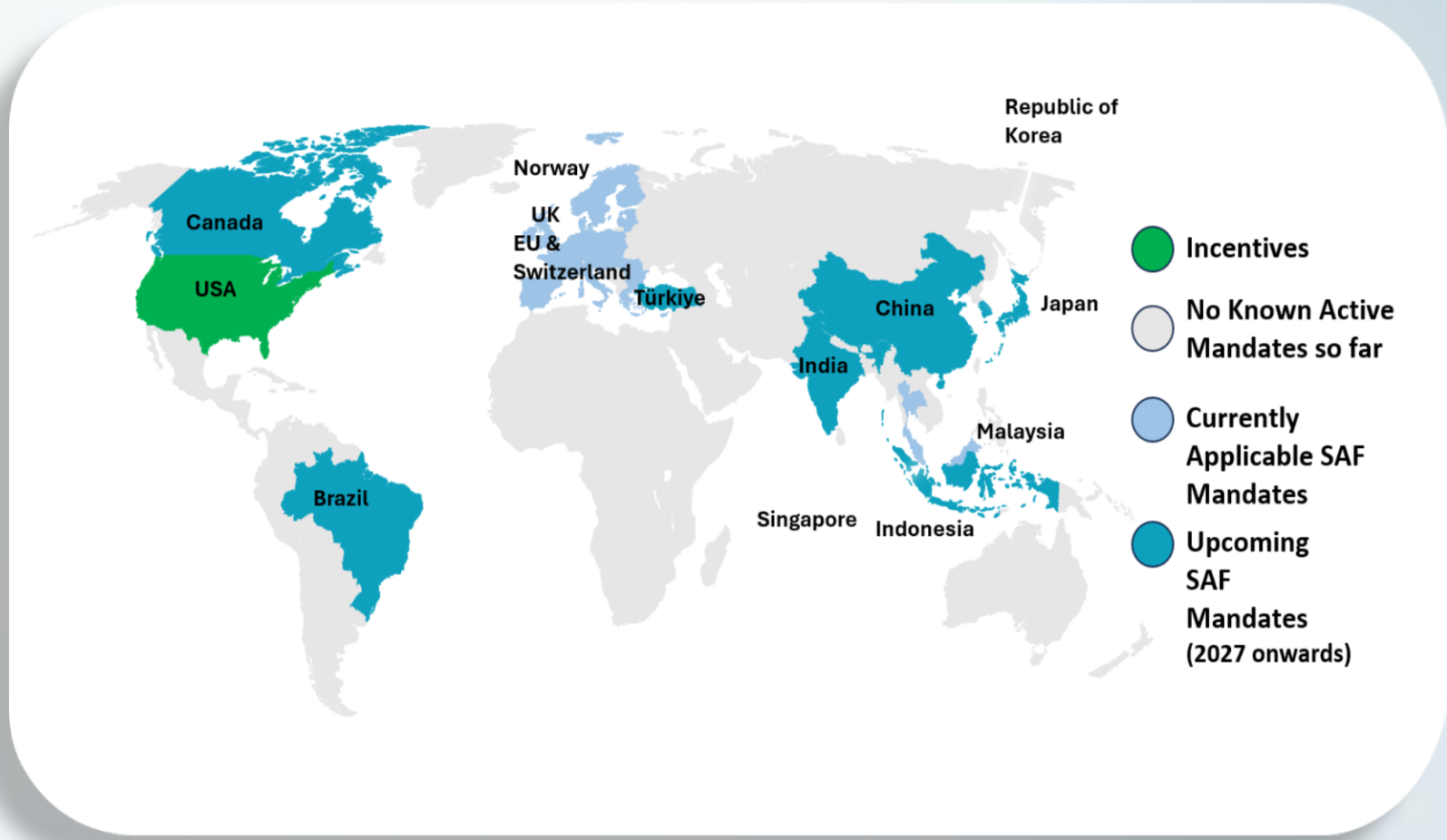



CO2
CO2
CO2
CO2
CO2
EU ETS
AVIATION
CO2 ALLOWANCE
100
50
100
EURO




The ReFuelEU roadmap for SAF provision
2025
2030
2050
2%
6%
70%
From 2025, fuel suppliers at Union airports are mandated to supply a percentage of SAF, increasing incrementally over the next 25 years.


ReFuelEU aviation and FuelEU maritime explained
The European Union's proposed regulations ReFuelEU aviation and FuelEU maritime set a common framework of sustainable fuels to promote and drive market, investment, reduce the greenhouse gas (GHG) emissions of aviation and maritime transport.
Why these regulations are needed
Aviation and maritime transport account for 14.4% and 13.5% of EU transport greenhouse gas emissions respectively.
14.4% Aviation
13.5% Maritime
72.1% Other sectors
EU transport emissions (share of total EU emissions, 2022)
What will change
The ReFuelEU aviation regulation will oblige:
1. Aircraft fuel suppliers at EU airports to ensure that the share of sustainable aviation fuels (SAF) in the aviation fuel supply increases over time.
2% 6% 20% 34% 42% 70%
2025 2030 2035 2040 2045 2050
2. Airlines to reduce the greenhouse gas intensity of the energy used on board their aircraft, with a target of –2% by 2030, –6% by 2035 and –14% by 2040 (compared to a 2019 baseline).
2019 (baseline)
2040
–14%
3. EU airports to make sustainable aviation fuels available to aircraft operators at all times.
SAF
In addition, a Union labelling system and certification requirements will ensure transparency for passengers on the share of sustainable aviation fuels used on their flights.
SAF
The FuelEU maritime regulation will oblige vessel owners and operators:
to reduce the greenhouse gas intensity of the energy used on board their ships over time, via:
A limit on the greenhouse gas intensity of the energy used on board ships
Increased use of renewable and low-carbon fuels
Use of onshore power supply (electricity) at port
Incentives for the uptake of zero-emission technologies
Targets to reduce the greenhouse gas intensity of the energy used on board ships:
-2% -6% -14.5% -31% -62% -80%
2025 2030 2035 2040 2045 2050
European Commission
Note: Percentage reductions compared to a 2020 baseline (subject to final adoption)


Republic of Korea
Norway
UK
EU & Switzerland
Canada
USA
Türkiye
China
Japan
India
Malaysia
Singapore
Indonesia
Brazil
Incentives
No Known Active Mandates so far
Currently Applicable SAF Mandates
Upcoming SAF Mandates (2027 onwards)





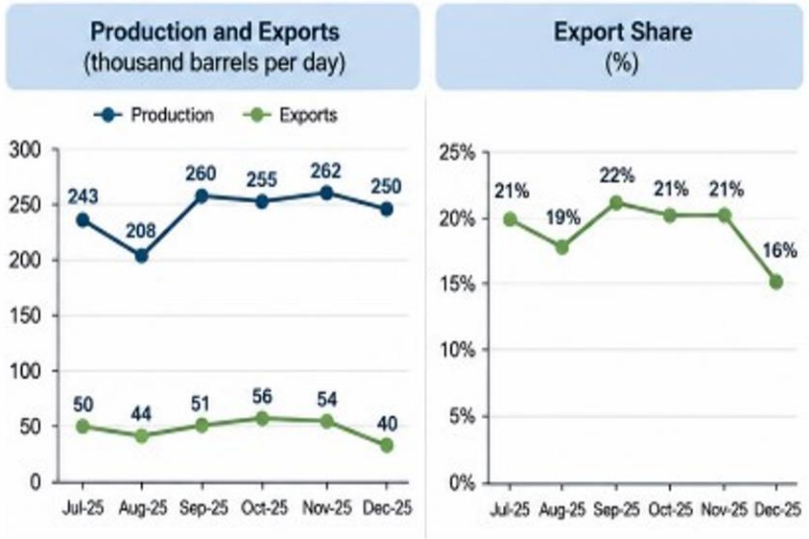




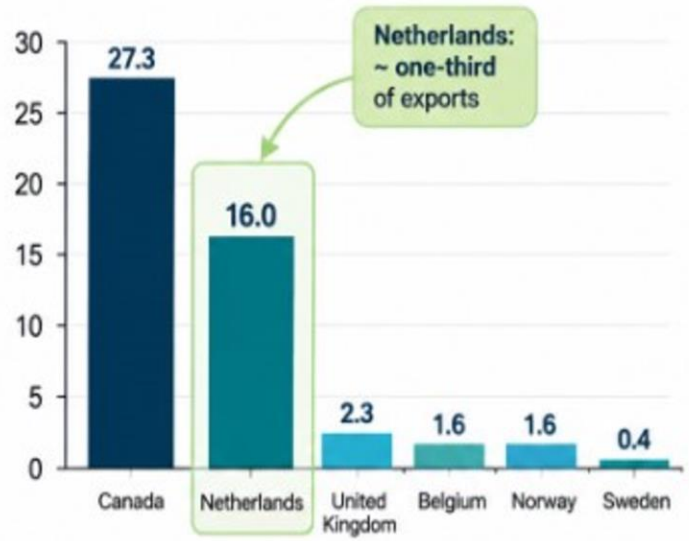
U.S. Renewable Fuel Exports

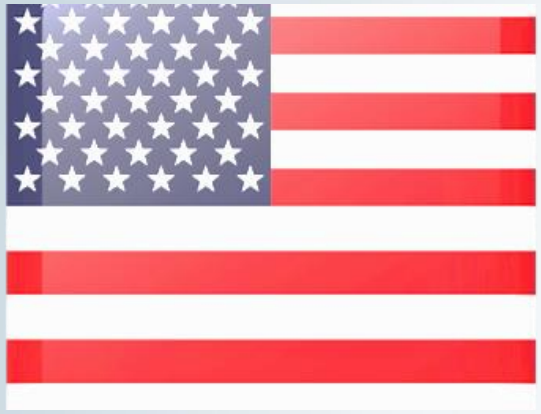
July–December 2025 | thousand barrels per day

U.S. renewable biofuels (SAF & diesel production vs. exports)



Exports of renewable biofuels by country

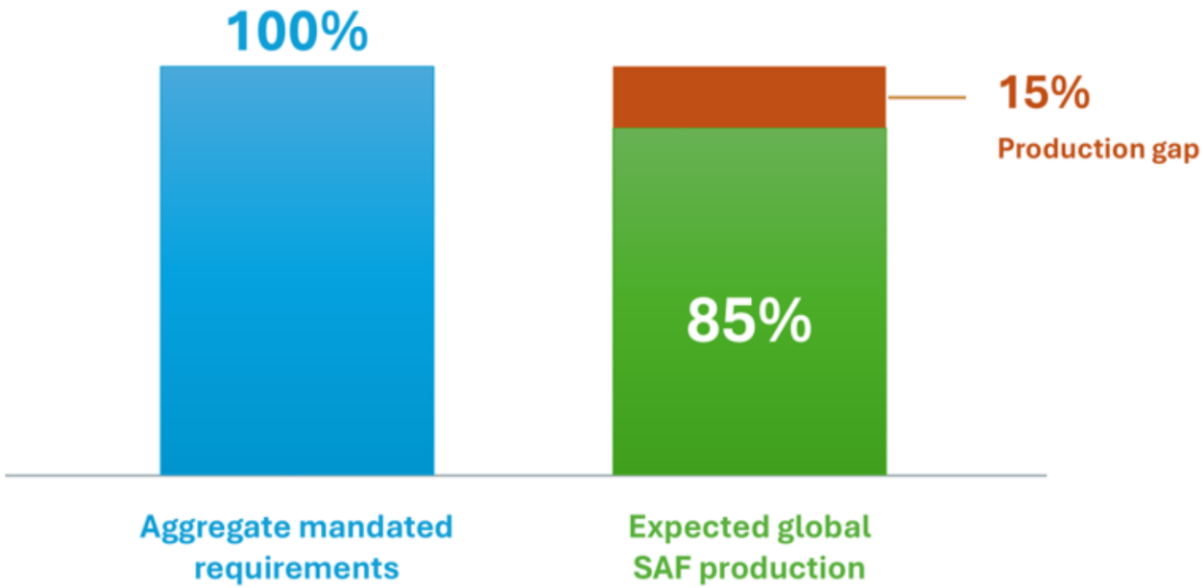






2026 Global SAF Production vs. Mandated Requirements

Projected production relative to aggregate SAF mandate requirements



%?



Different Sustainability standards, different SAF eligibility

More production does not automatically satisfy every market's requirements

SAF examples	EU	CORSIA	Other market
EU	✓	✗	✗
CORSIA	✗	✓	✗
Others	✗	✗	✓



2030: Expanding SAF Mandates, Persistent Supply Gap

Projected global production covers 63% of aggregate mandated quantities

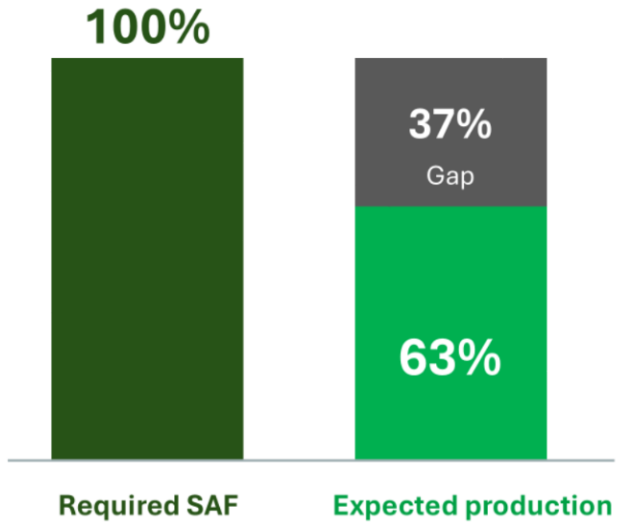
SAF mandates in 2030

EU
6%
EU SAF requirement

UK
10%
UK SAF requirement

Other
Additional
Individual mandates

Production versus aggregate mandated quantities



Mandates Expand Faster Than The Supply Available To Meet Them


CO2

10%


Current Problem:
Fragmented European Airspace
Fragmented FIRs
Multiple handoffs
Less direct routing

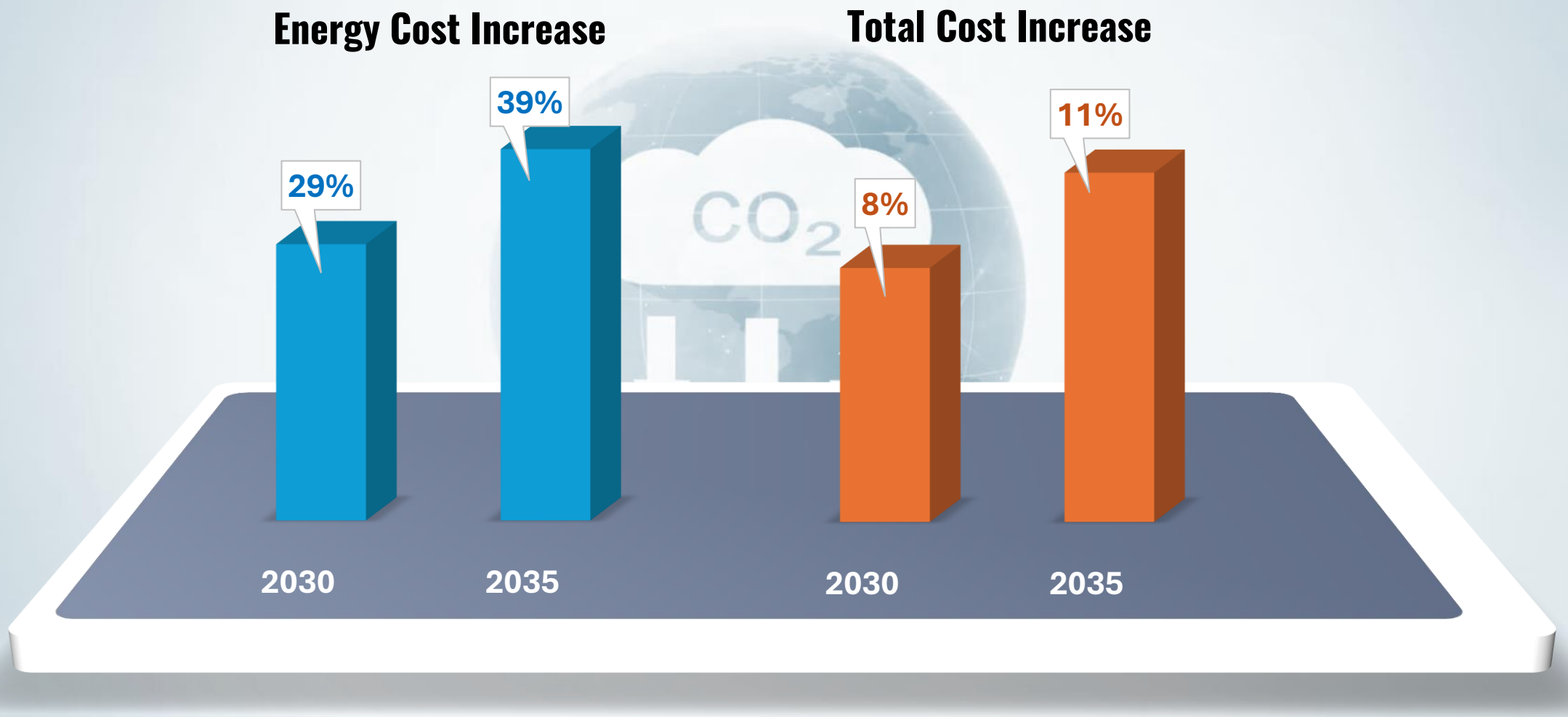

SESAR
One Unified European FIR
Single integrated airspace
More direct routing

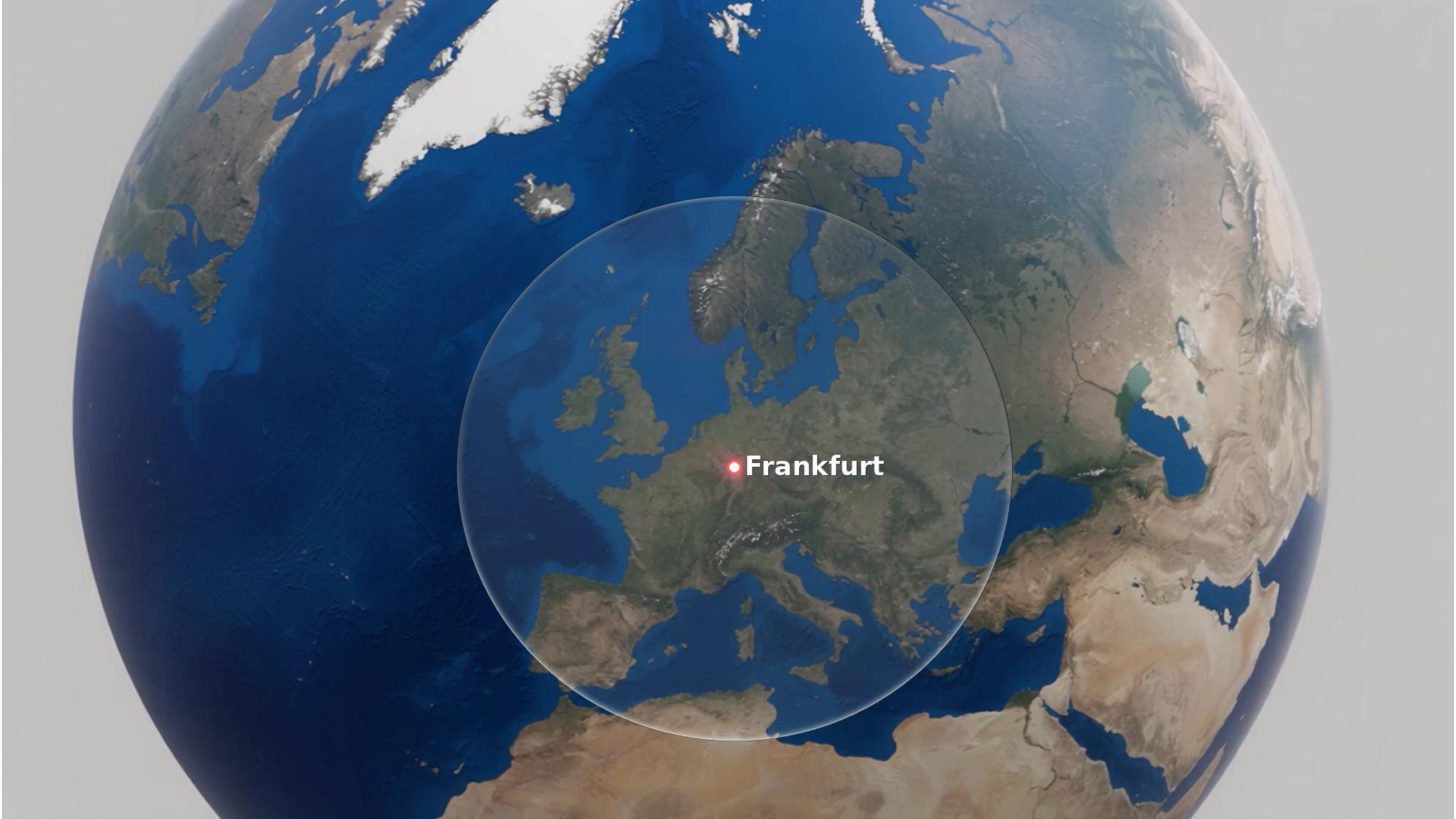

CO_2


AVAILABLE SUPPLY
LIMITED


CORSIA
SAF
Limited supply
Infrastructure
no progress
Verified CORSIA Eligible Offset Certificate

EU ETS | Refuel EU | Mandates | CORSIA | Incentive Scheme | US SAF Production | US SAF Production | Sustainability Criteria | SAF Production | SESAR




Frankfurt

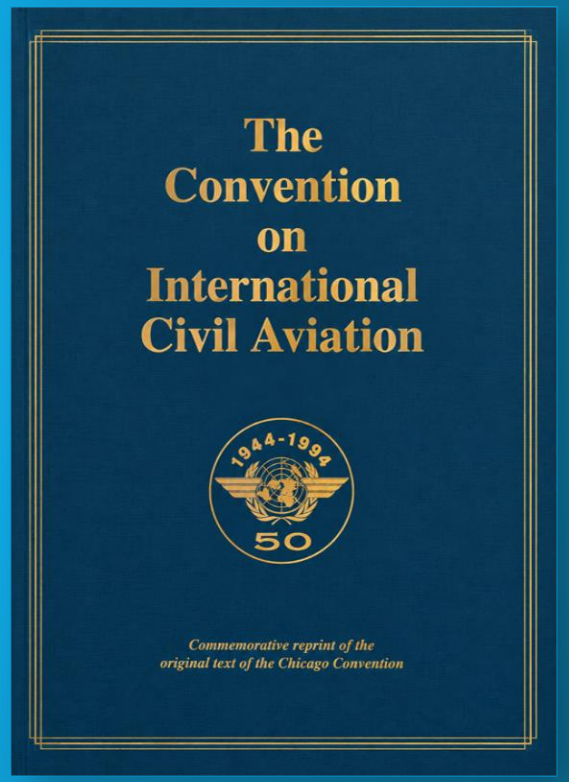
أسئلة حول توسيع البرنامج الاوروبي

Questions About The EU ETS Expansion









أسئلة حول توسيع البرنامج الاوروبي

Questions About The EU ETS Expansion



٥٠٠٠ كيلومتر؟

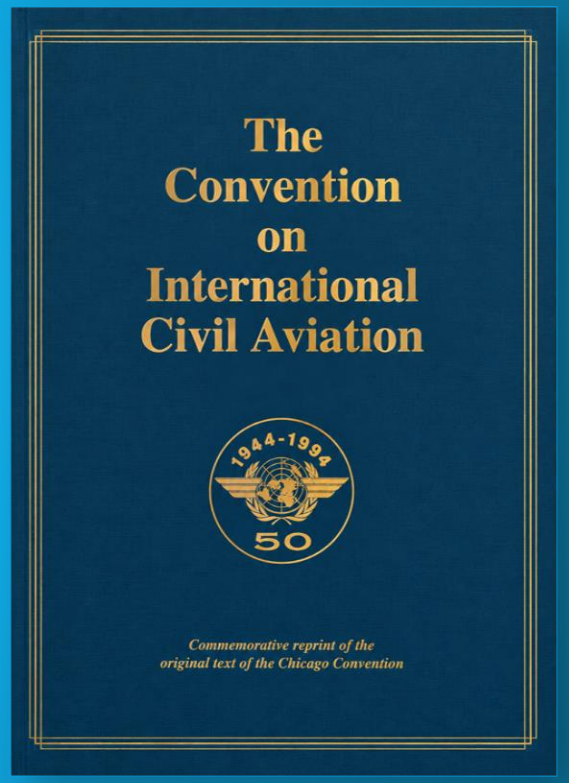
لماذا هذا الشعاع
وليس غيره؟

5,000 km?

Why this radius and not another?







أسئلة حول توسيع البرنامج الاوروبي

Questions About The EU ETS Expansion



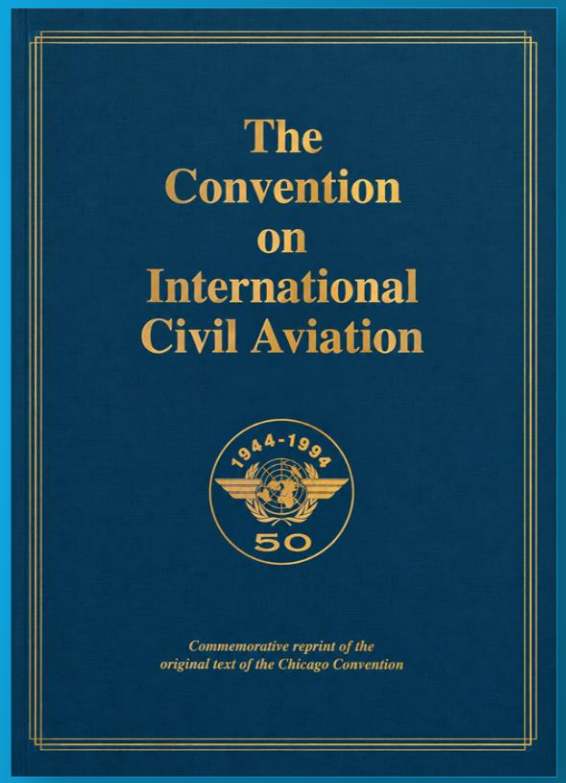
السلطة الرقابية

بأي حق تُطبّق سلطة
إجراءاتها في أجواء دول أخرى
وتمنح نفسها الرقابة
والمرجعية؟

Regulatory Authority

By what right does an authority regulate other states' airspace?





أسئلة حول توسيع البرنامج الاوروبي

Questions About The EU ETS Expansion



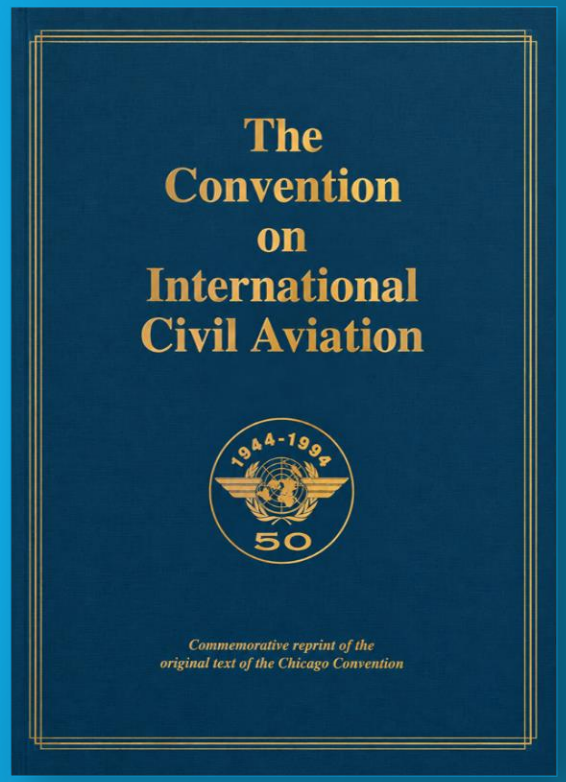


المعاملة بالمثل

هل يقبل الاتحاد الأوروبي
تشريعات دول أخرى
على شركاته وأجوائه؟

Reciprocity

Would the EU accept
foreign rules on its
airlines and airspace?



أسئلة حول توسيع البرنامج الاوروبي

Questions About The EU ETS Expansion







معاهدة شيكاغو

ماذا يبقى من المعاهدة
ومن سيادة الدول
على أجوائها؟

Chicago Convention

What remains of the Convention and airspace sovereignty?

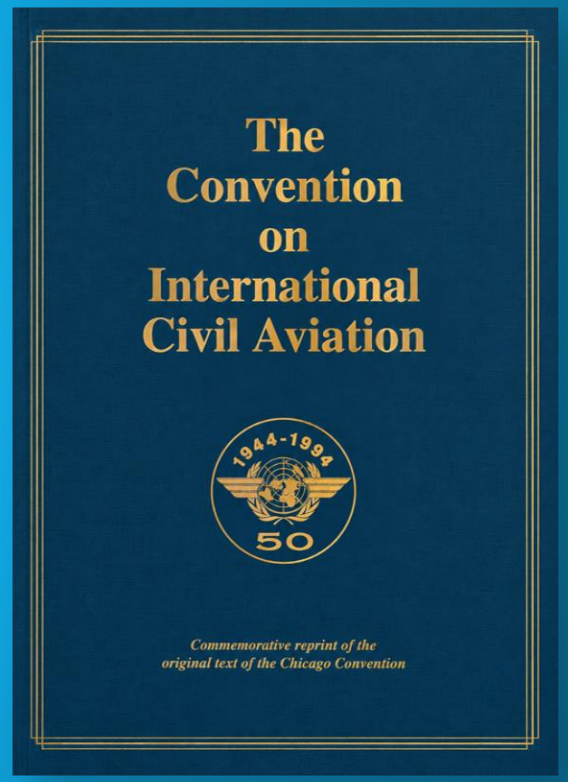
أسئلة حول توسيع البرنامج الاوروبي

Questions About The EU ETS Expansion










EU ETS
EXPANSION
APPROVED
The Convention on International Civil Aviation
1944-1994
50
Commemorative reprint of the original text of the Chicago Convention


NATIONAL LAWS
SOVEREIGNTY
REGULATIONS


EU
EU SAF STANDARDS
EU VERIFIED CARBON CREDITS STANDARDS
SAF
ICAO
ICAO (GLOBAL)
CORSIA SAF STANDARDS
CORSIA VERIFIED CARBON CREDITS STANDARDS
SAF
SAF STANDARDS
VERIFIED CARBON CREDITS STANDARDS
SAF STANDARDS
VERIFIED CARBON CREDITS STANDARDS





EU
SAF

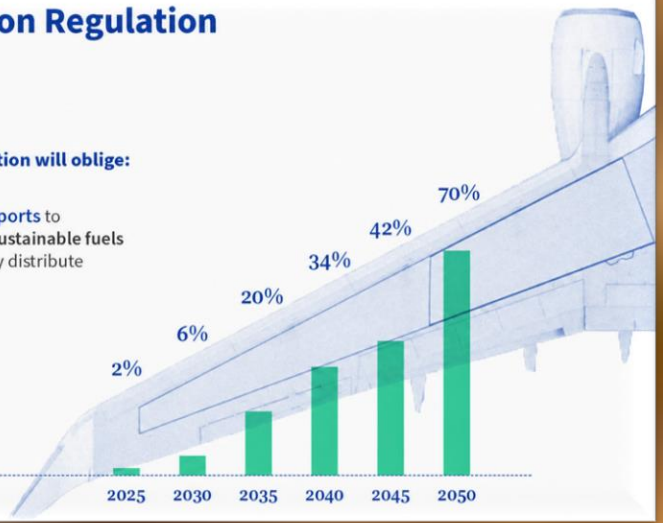
CO_2

Refuel EU Aviation Regulation

The ReFuelEU aviation regulation will oblige:

aircraft fuel suppliers at EU airports to gradually **increase the share of sustainable fuels** (notably synthetic fuels) that they distribute

Minimum share of supply of sustainable aviation fuels (in %)




EU
ICAO
ICAO
(GLOBAL)
CORSIA
SAF
VERIFIED
CORSIA CARBON CERTIFICATE
Carbon Offsetting and Reduction Scheme for International Aviation
ABC International Airlines
125,000 tCO2
CORSIA
CO2
EU
SAF
EU Recognized



بسبب اختلاف المعايير نقوم بتسديد ثمن الانبعاثات مرتين

Differences in standards result in double payment for the same emissions



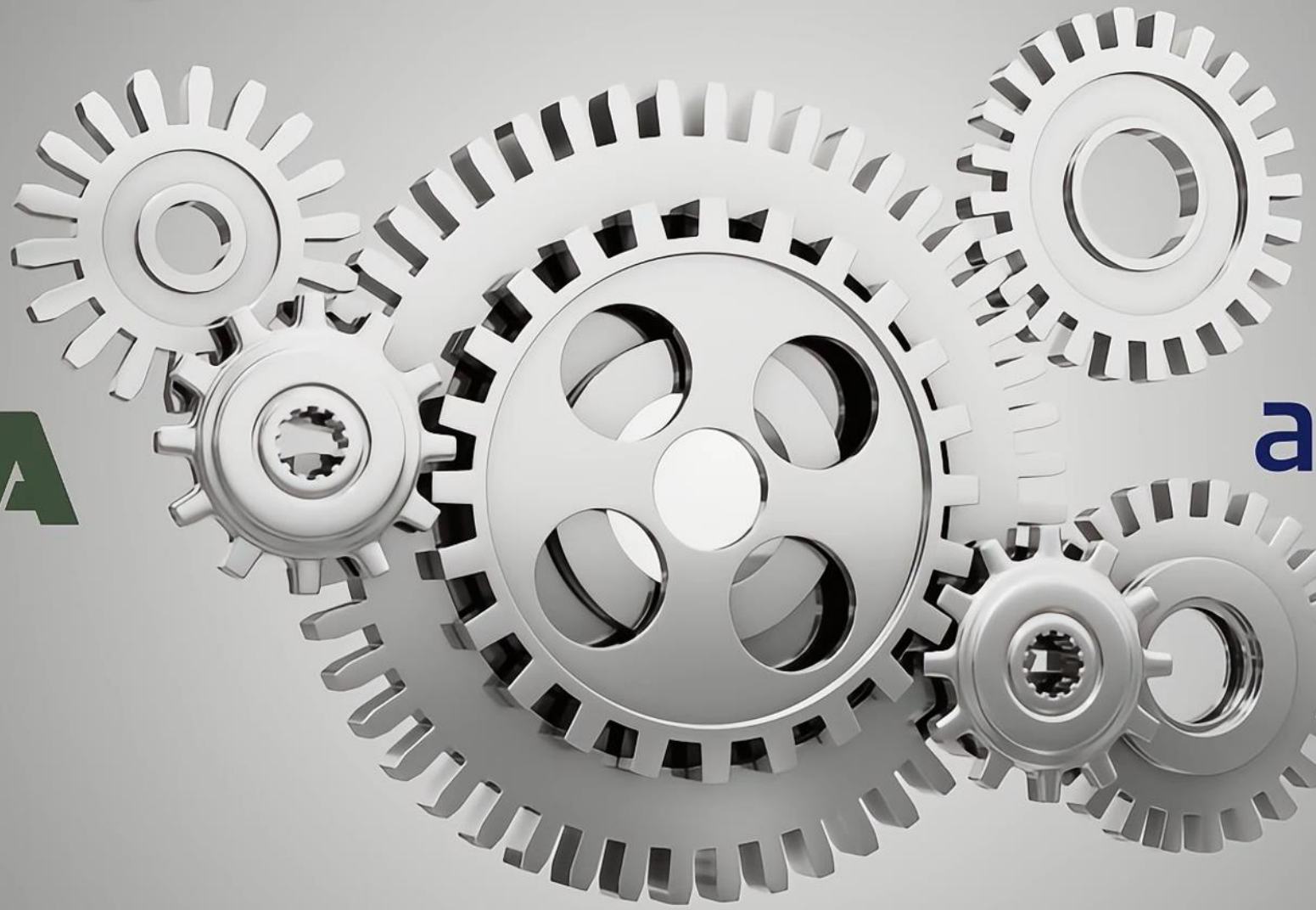



CO_2
STANDARDS


CORSIA
YEAR 2030
USD
103
MILLION
Projected
Duplication Cost
YEAR 2035
USD
315
MILLION
Projected
Duplication Cost


CORSIA
RECOGNIZED VERIFIED EMISSION REDUCTIONS
IN CORSIA CALCULATIONS
CO_2
NATIONAL
CORSIA
IMPLEMENTATION
LEGISLATION AND REGULATIONS
ICAO • OACI • ИКАО
国际民航组织 • ايكاو
ACAO

Digital Transformation Task Force



SITA

amadeus

REPORTING PERIOD
180 DAYS LEFT

2024

PLANNING

OPERATIONS

REPORTS

DATA

ACCOUNT

JET FUEL		SAF COST		TAXES CHARGES & LEVIES		OFFSETS & CREDITS		PENALITIES		INCENTIVES		TOTAL (YTD)
$1.8 m	+	$2.6 m	+	$2.1 m	+	$2.6 m	+	$0.1 m	-	$0.3 m	=	$10.1m
PLAN $2.7m -$0.1		PLAN $2.7m -$0.1		PLAN $2.7m -$0.1		PLAN $3.1m +$0.3 m		PLAN $0.15mm +$0.05m		PLAN $0.15m +$0.05		PLAN $6.5m -$0.3m

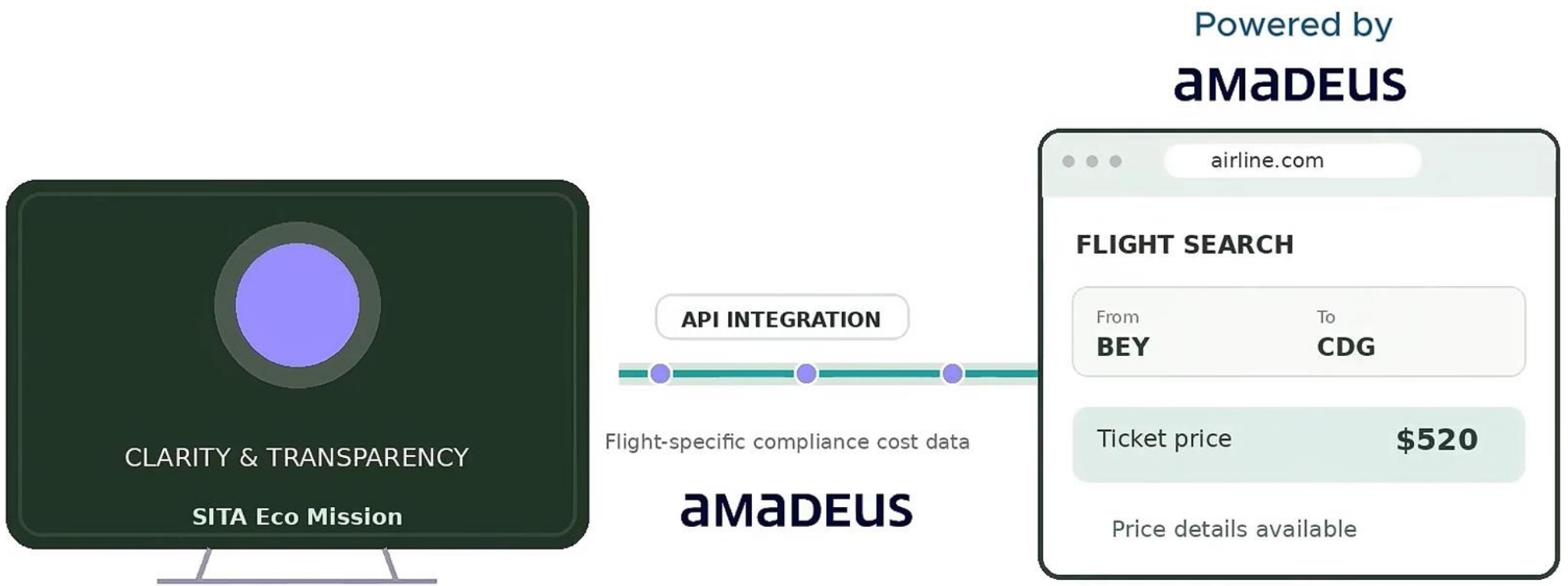


- ALL 39
- CORSIA 4
- EU ETS 12
- UK ETS 1
- SAF 1

2023	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEP	OCT	NOV	DEC	TOTAL
Plan	$ 1.6 m	$ 1.6 m	$ 1.6 m	$ 1.6 m	$ 1.6 m	$ 1.6 m	$ 1.6 m	$ 1.6 m	$ 1.6 m	$ 1.6 m	$ 1.6 m	$ 1.6 m	$ 19.2 m
Actual	$ 1.6 m	$ 1.6 m	$ 1.6 m	$ 1.6 m	$ 1.6 m	$ 1.6 m	$ 1.6 m	$ 1.6 m	$ 1.6 m	$ 1.6 m	$ 1.6 m	$ 1.6 m	$ 18.6 m

SITA

ENVIRONMENTAL COST DATA



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airline.com

FLIGHT SEARCH

From
BEY

→

To
CDG

Ticket price **$520**

PRICE DETAILS

Base fare	**$420**
Taxes & charges	**$75**
Environmental compliance cost	**$25**

Included in the $520 total — not an additional fee


AIRCRAFT DELIVERY DELAYS
Extended lead times impact fleet growth plans.
SPARE PARTS BACKLOG
Critical components facing prolonged supply delays.
ENGINE SHORTAGES
High demand and long overhaul lead times.
AVIATION SUPPLY CHAIN CRISIS
FLEETS | ENGINES | PARTS | OPERATIONS AT RISK

TRAVEL RECOVERED.
SUPPLY CHAINS DID NOT.

Aircraft • Engines • Spare Parts



Fleet Average Age Globally and for AACO Members & Current Global Aircraft Backlog

GLOBAL FLEET AVERAGE AGE



11.8 YEARS 2019 → 13.5 YEARS 2026

+1.7 years

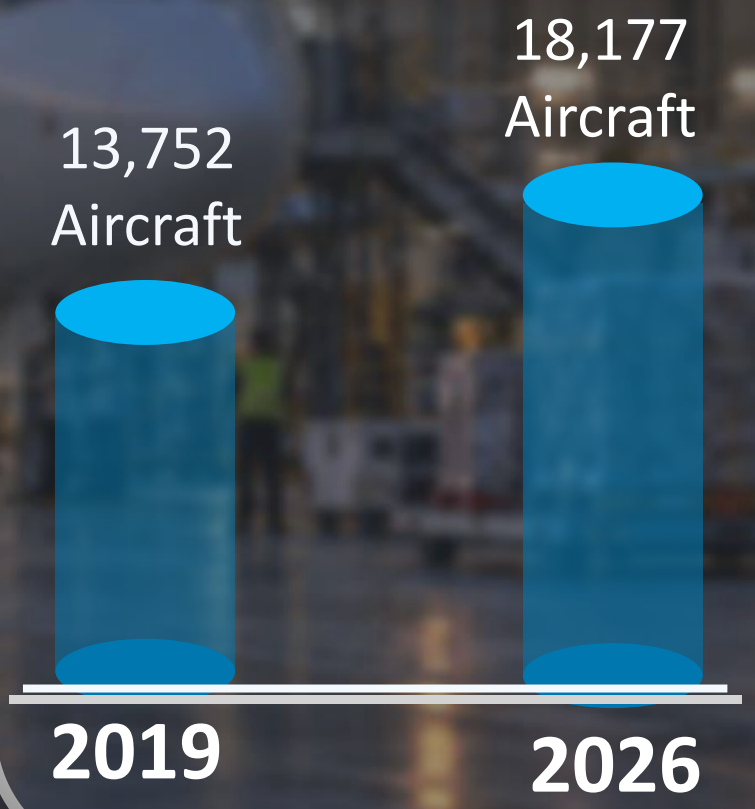
AAACO MEMBERS' FLEET AVERAGE AGE



7.5 YEARS 2019 → 10.1 YEARS 2026

+2.6 years

GLOBAL AIRCRAFT BACKLOG

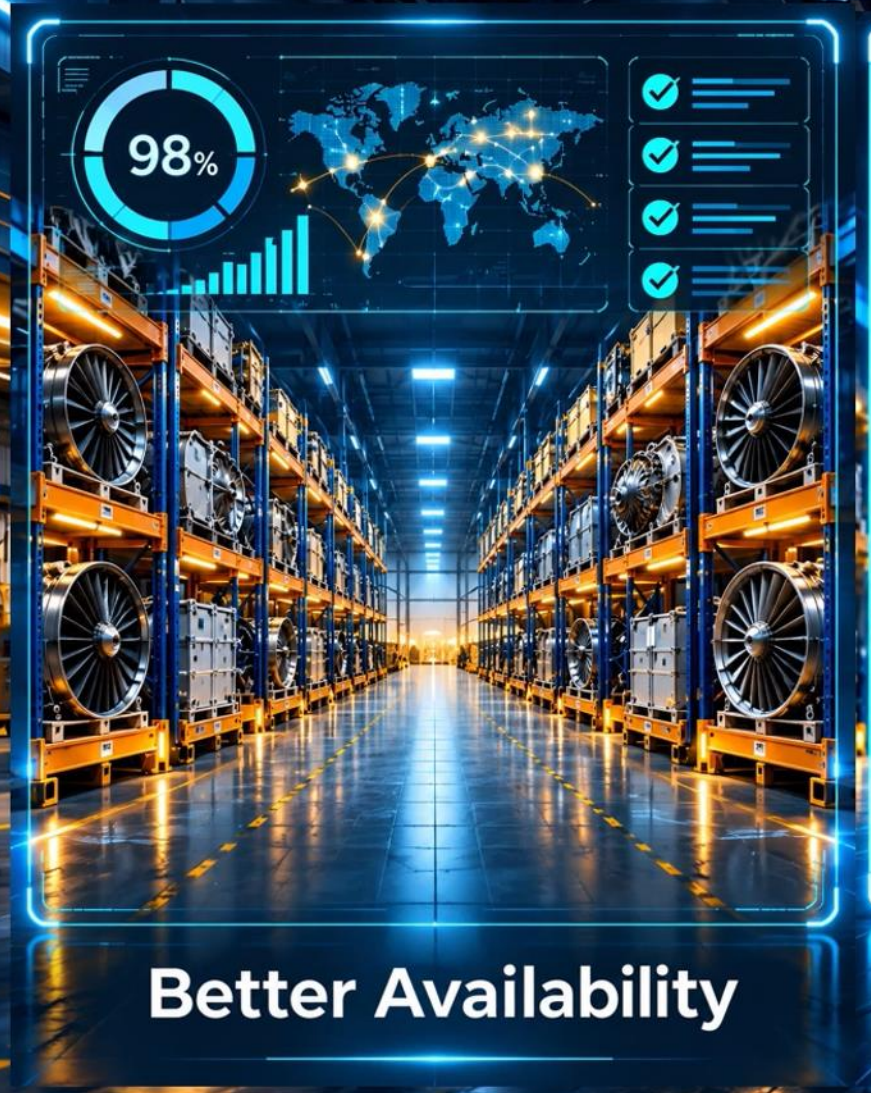



CO_2


AIRCRAFT ORDER BACKLOG
18,177
AIRCRAFT
DELAYED DELIVERIES
4,425
AIRCRAFT
ENGINE SUPPLY CONSTRAINTS



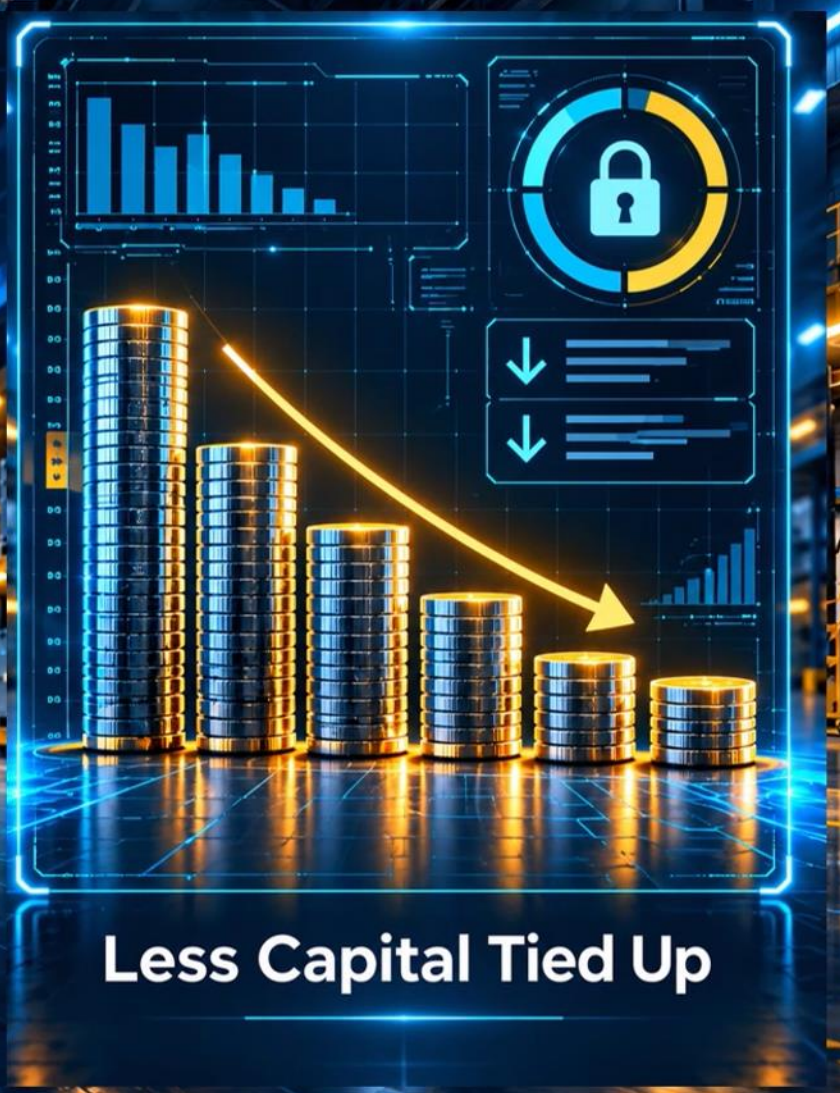




Better Availability



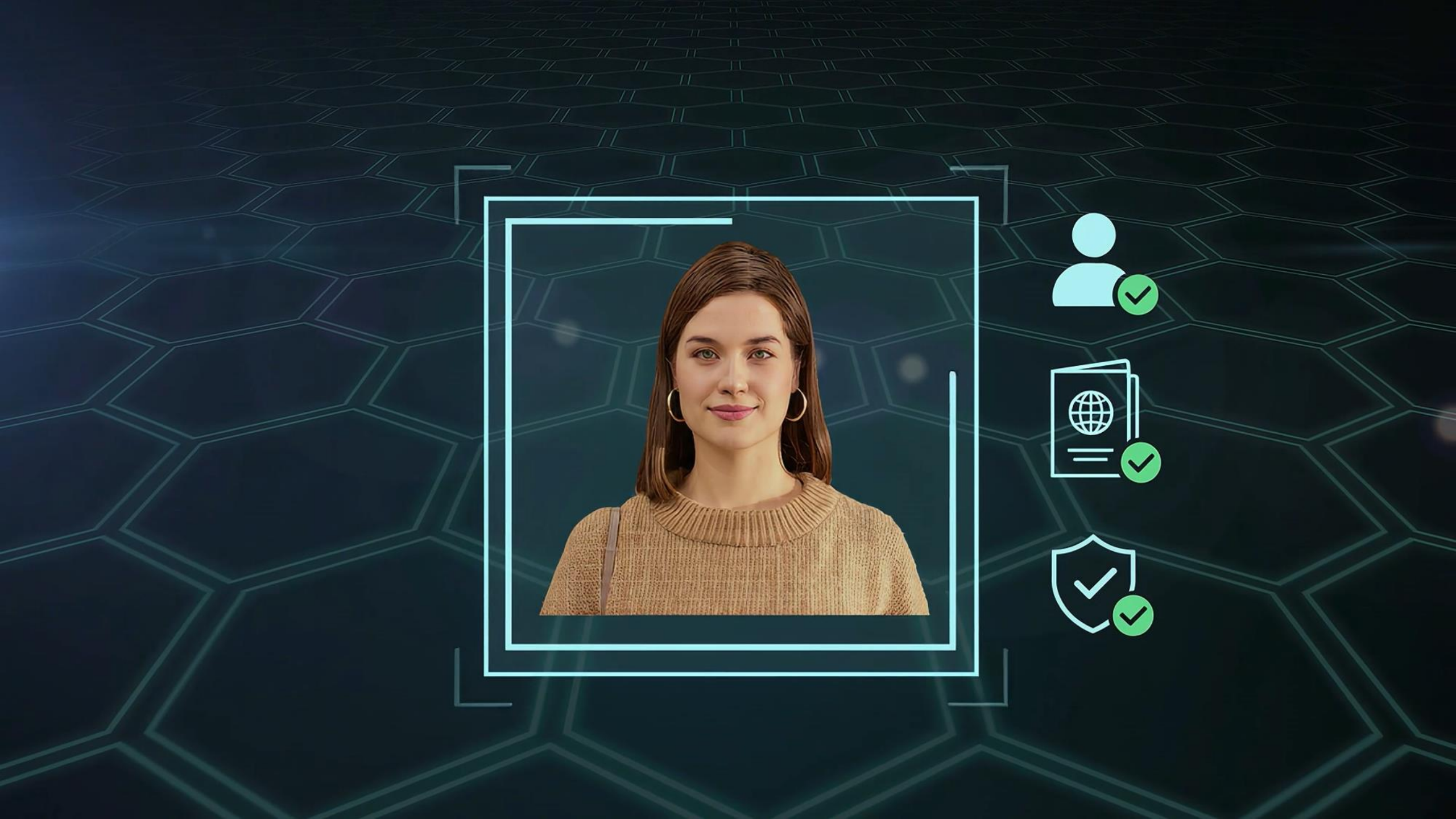
Lower Costs

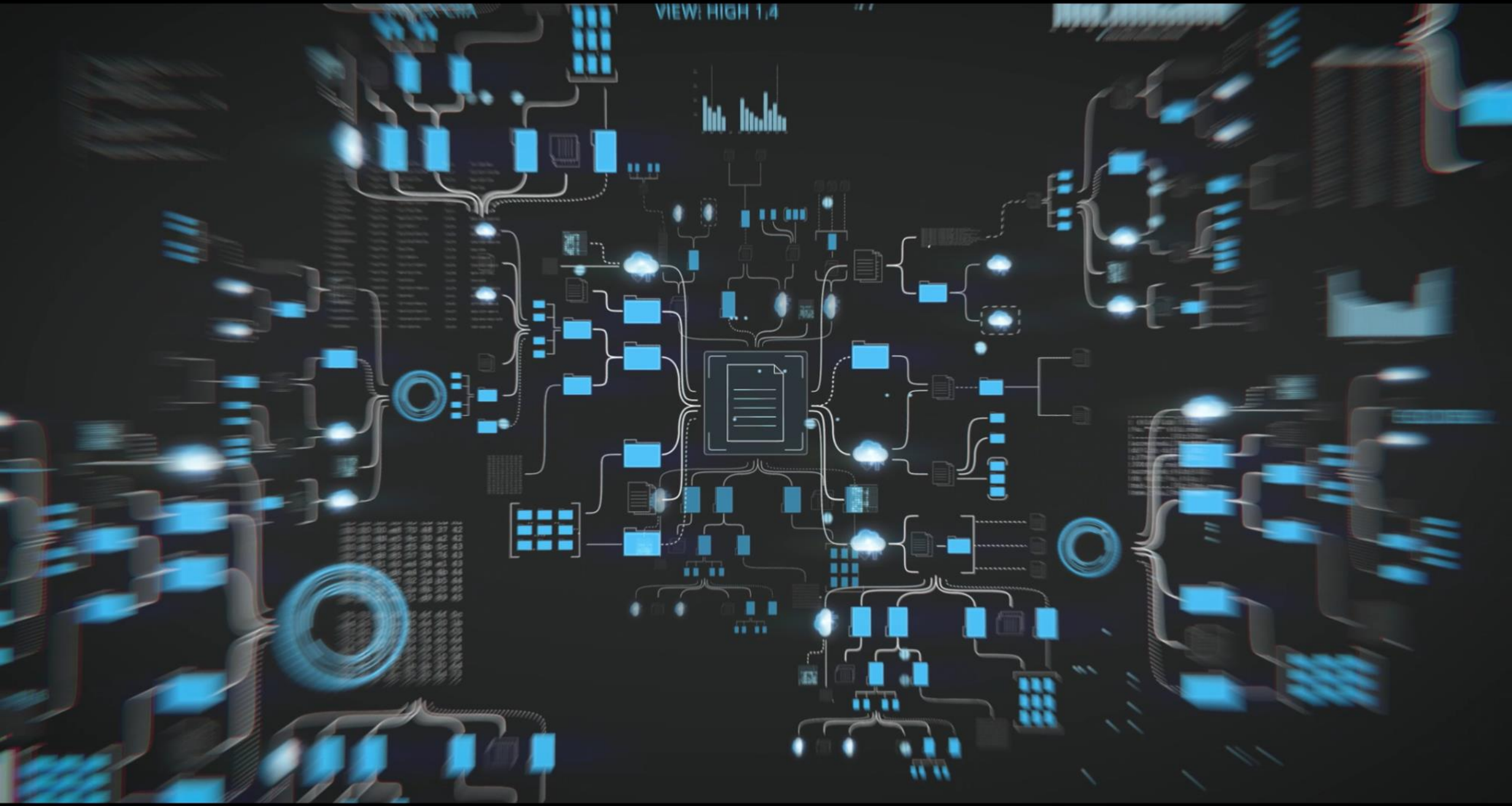


Less Capital Tied Up


فريق عمل ادارة مخزون قطع الغيار
Inventory Management Task Force
PURCHASE ORDER
Potential Joint Procurement
AACO Executive Committee – اللجنة التنفيذية للاتحاد


DIGITAL TRAVEL IDENTITY
Secure digital credential
Passenger-controlled verification
Identity verified
Travel document verified
Entry eligibility verified




VIEW: HIGH 1.4


Tromso
Bergen
Glasgow
Goteborg
St. Petersburg
Riga
London
Gdansk
Minsk
Kazan
Lyon
Budapest
Volgograd
Odessa
Rostov
Krasnodar
Astrakhan
Rabat
Cagliari
Tirana
Tunis
Ankara
Yerevan
Baku
Malatya
Tabriz
Iraklio
Aleppo
Mosul
Beirut
Kermanshah
Sakakah
Shiraz
Luxor
Hail
Buraydah
Ouagadougou
Yaounde
Addis Ababa
Okha
Ulaanbaatar
Pyongyang
Beijing
Urumqi
Bishkek
Kashi
Qarshi
ushanbe
Mary
Mashhad
Zhengzhou
Xian
Wenzhou
Changsha
Guangzhou
Nanning
Hanoi
Multan
Delhi
Karachi
Khulna
Mandalay
Bhilai
Rangoon
Bangkok
om Penh
Mumbai
Banda Aceh
ngapore

CHATBOTS

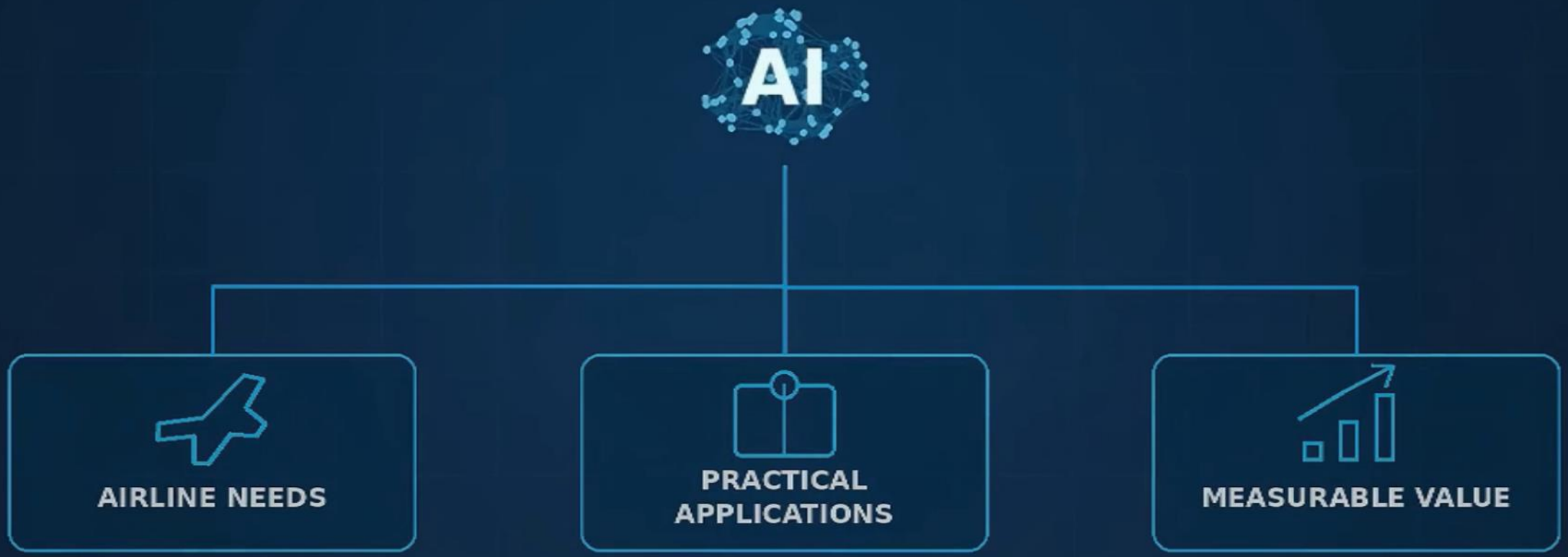
AUTOMATION



AI TOOLS

APPLICATIONS

WHERE AI CAN ADD VALUE



WHERE AI CAN ADD VALUE

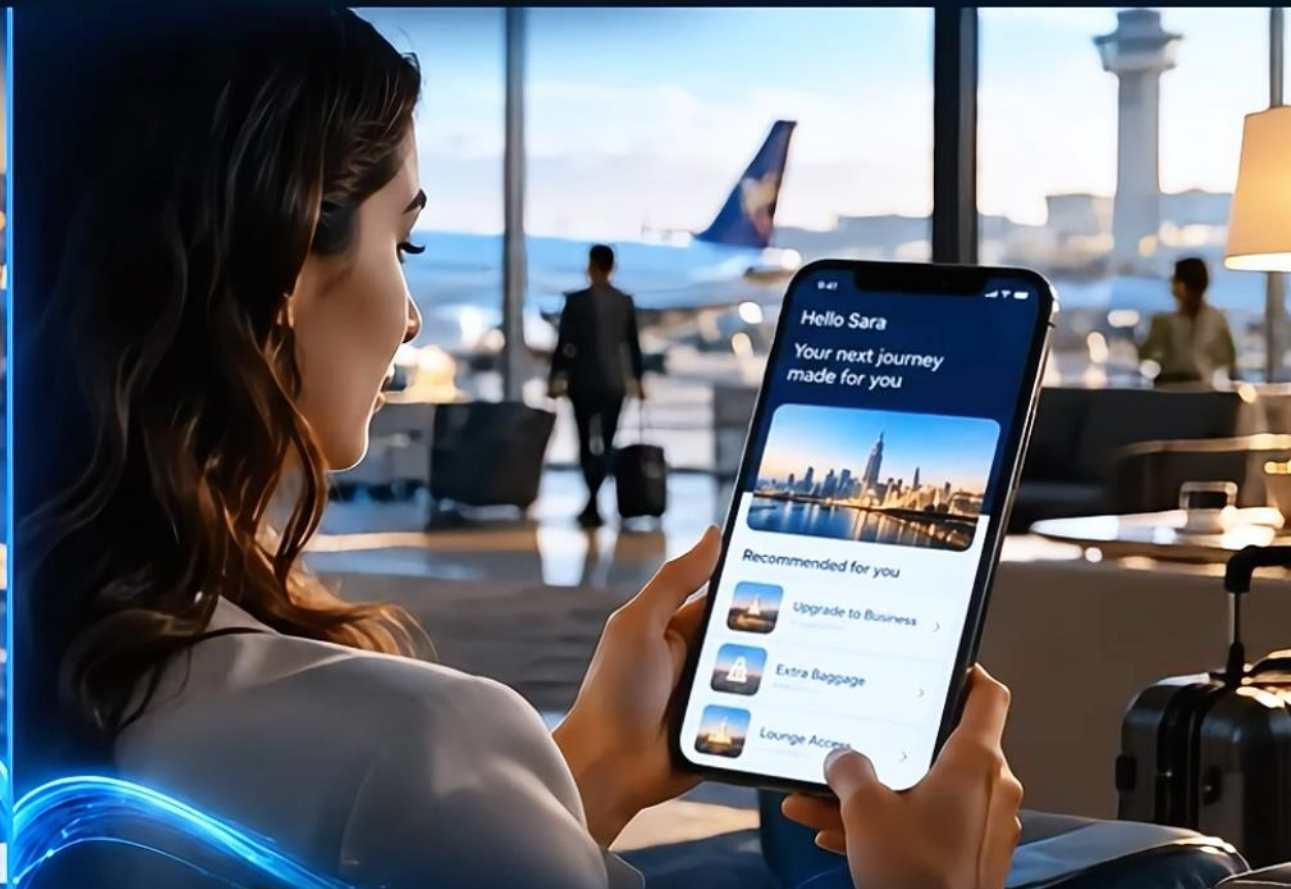


AI THAT DELIVERS REAL VALUE



IMPROVED
COMMERCIAL PERFORMANCE

Higher revenue. Better offers.
More efficient distribution.



ENHANCED
PASSENGER EXPERIENCE

More relevant offers. More responsive service.
A smoother journey.

aac
الإتحاد العربي للنقل الجوي
arab air carriers' organization





اللجنة التنفيذية

Executive Committee



Mr. Abdelhamid Addou
Chairman



Mr. Hamad Al-Khater



Capt. Ahmed Adel



H.E Eng. Ibrahim Al-Omar



Mr. Mohamad El-Hout





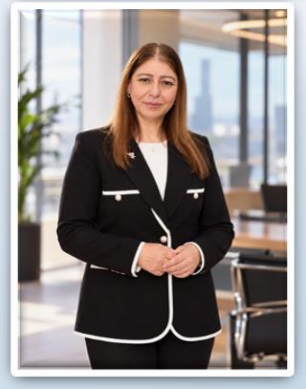
Mr. Antonoaldo Neves



Mr. Bander Almohanna



Capt. Anwar Akkad



Mrs. Halima Khouaja

Member Airlines

أعضاء الاتحاد













































































المجالس التوجيهية وفرق العمل
Steering Boards & Task Forces

المجلس التوجيهي لتنمية وتطوير الموارد البشرية
Human Resources Development Steering Board

المجلس التوجيهي للوقود
Fuel Steering Board

المجلس التوجيهي للصيانة والهندسة والتعمير
Engineering & Maintenance Steering Board

المجلس التوجيهي لإدارة تخطيط الطوارئ
Emergency Response Planning Steering Board

المجلس التوجيهي لمجموعة أماديوس
AACO Amadeus Steering Board

فريق عمل وقود الطائرات المستدام
Sustainable Fuel Aviation Task Force

فريق عمل التحول الرقمي
Digital Transformation Task Force

فريق عمل السياسات البيئية
Environmental Policy Group

الفريق الاستشاري لأمن الطيران
AVSEC Advisory Group

فريق عمل السياسات الجوية
AeroPolitical Watch Group

شركات الطيران الشريكة
Partner Airlines



شركاؤنا في الصناعة

Industry Partners



QATAR AIRWAYS القطرية

A WARM APPRECIATION TO OUR SPONSORS

2 - 4 November 2026
aac الإتحاد العربي للنقل الجوي
arab air carriers' organization
الجمعية العامة التاسعة والخمسين
59TH AGM Doha

PLATINUM

BOEING

GOLD

AIRBUS | SITA | visit QATAR

SILVER

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BRONZE

CHANGI airport group | D22 CAPITAL

النشرة السنوية لإحصاءات النقل الجوي
Arab Air Transport Statistics



التقرير السنوي للاتحاد
AACO Annual Report



2 - 4 November 2026

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الإتحاد العربي للنقل الجوي

arab air carriers' organization

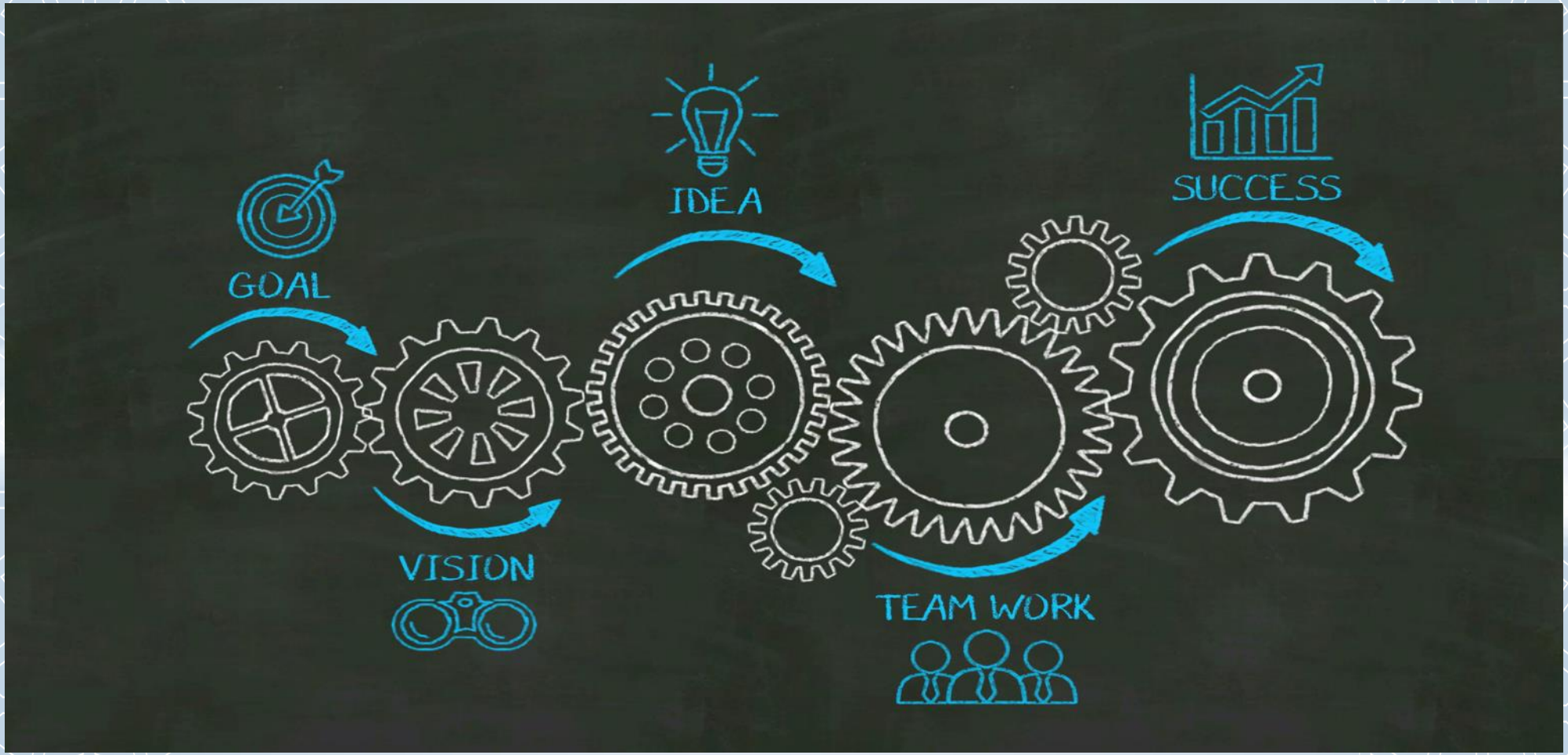
59TH AGM

الجمعية العامة التاسعة والخمسين

Doha







نعتز دائمًا بخدمتـــــكم

We are always proud to serve you



نعتز دائمًا بخدمتـــــكم

We are always proud to serve you

2 - 4 November 2026

aac

الإتحاد العربي للنقل الجوي

arab air carriers' organization

الجمعية العامة التاسعة والخمسين

59TH AGM

Doha

Thank You

وشكرًا