

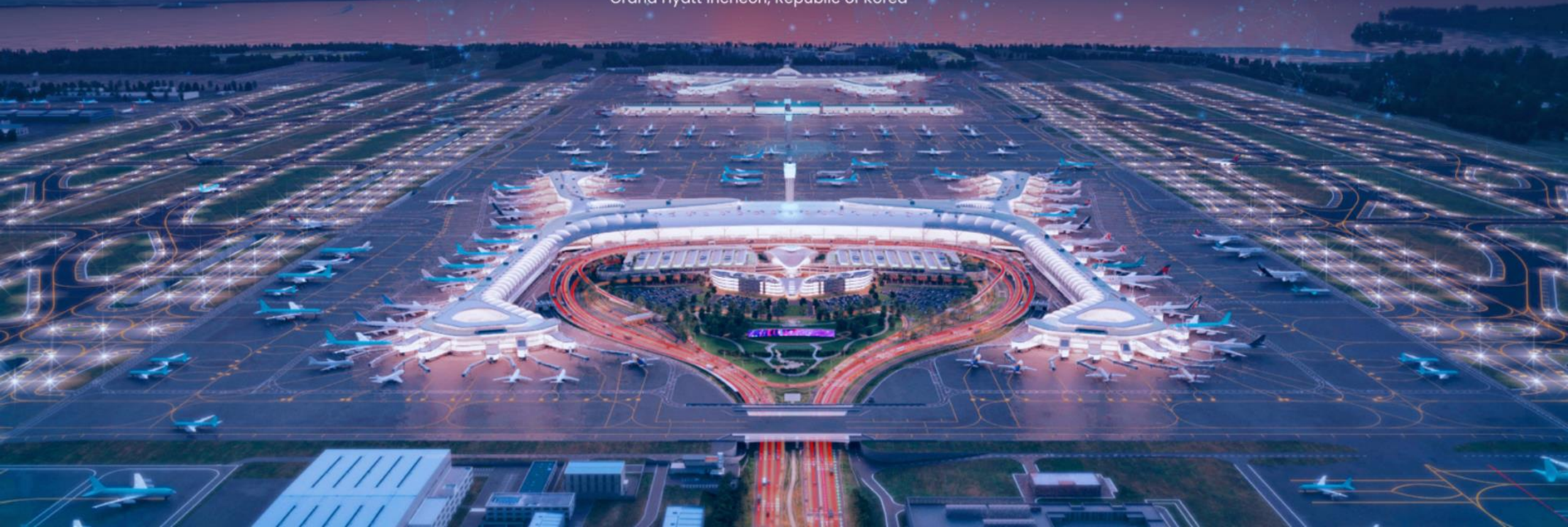
제8회 세계항공컨퍼런스

WORLD AVIATION CONFERENCE 2025

The Future of Aviation Industry: Advanced Tech and Sustainability

September 2(Tue) - 4(Thu), 2025

Grand Hyatt Incheon, Republic of Korea





AIRPORTS COUNCIL
INTERNATIONAL

STATE OF THE AIRPORT INDUSTRY

by Justin Erbacci Director General ACI World



Smarter Greener Central to global mobility

Airports are the heart of aviation's transformation — powered by tech and sustainability

WHERE WE ARE IN 2025

Passenger growth and resilience
Stable economy
Level fuel prices
Steady consumer confidence

VS

Two global conflicts
Aircraft delivery delays
Skilled labor shortages
Trade wars and recession fears

CONSUMER INDICATORS

(SOURCE: OECD)



4.9%

UNEMPLOYMENT

**Labour market
remains strong**

3.9%

INFLATION^{G20}

**Easing but still
above target**

98.5

CONSUMER
CONFIDENCE

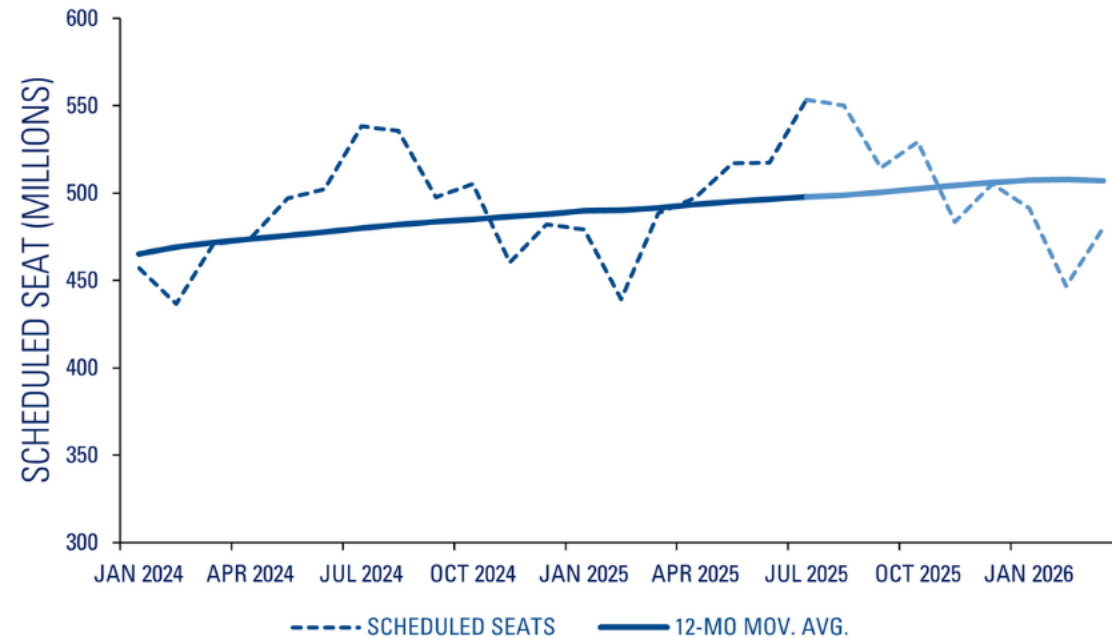
**Households
remain
cautious**

SEATS ARE GROWING

(SOURCE: CIRIUM DIIO MI)

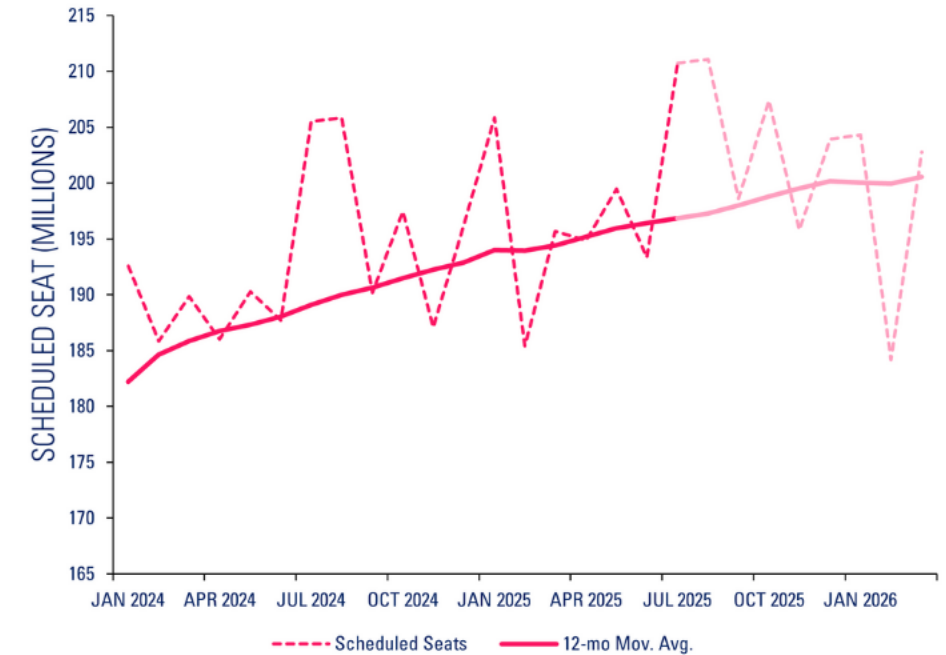
Scheduled seats, global

JAN 2024 - MAR 2026



Scheduled seats, to/ from Asia-Pacific

JAN 2024 - MAR 2026



GLOBAL PASSENGER TRAFFIC

2024
9.4B

PASSENGERS

+8.4% vs 2023
+2.7% vs 2019

2025
9.8B

PASSENGERS*

+3.7% YoY

INTERNATIONAL VS DOMESTIC

INTERNATIONAL IN 2024

3.8B

PASSENGERS

INTERNATIONAL IN 2025

+5.4%

FORECASTED

DOMESTIC IN 2024

5B

PASSENGERS

DOMESTIC IN 2025

+2.5%

FORECASTED

ASIA-PACIFIC IS A POWERHOUSE OF GLOBAL AVIATION GROWTH

2024

3.4B
PASSENGERS

+12.5 YoY

2025

3.6B
PASSENGERS

+5.6 YoY

**East Asia outlook is
tempered by:**

**Overcapacity
Tariff tensions
Policy uncertainty
Demographic decline**

TOP 20 BUSIEST AIRPORTS

2024

AIRPORT

2023

1	Atlanta ATL
2	Dubai DXB
3	Dallas/Fort Worth DXB
4	Tokyo HND
5	London LHR
6	Denver DEN
7	Istanbul IST
8	Chicago ORD
9	New Delhi DEL
10	Shanghai PVG
11	Los Angeles LAX
12	Guangzhou CAN
13	Incheon ICN
14	Paris CDG
15	Singapore SIN
16	Beijing PEK
17	Amsterdam AMS
18	Madrid MAD
19	New York JFK
20	Bangkok BKK

1
2
3
5
4
6
7
9
10
21
8
12
20
11
17
23
14
15
13
26

**Incheon Airport
jumped from 99th in
2022 → 20th in 2023 →
13th in 2024.**

**Also, Incheon Airport is
3rd in international
passengers in 2024.**

AIR CARGO: STRONG REBOUND IN 2024

+9.9%

GLOBAL
VOLUMES
YOY

RECORD-HIGH
126.5M

METRIC
TONNES

+12.6%

INTERNATIONAL
FREIGHT

+4%

DOMESTIC
FREIGHT

+4.8% YoY

GROWTH IN ASIA-PACIFIC
IN Q1 2025

Growth driven by

Improved global trade conditions

Shift to air due to Red Sea disruptions

Rising demand for time-sensitive shipments

AIRPORT REVENUE LAGS BEHIND PASSENGER GROWTH



US\$ 146B

GLOBAL AIRPORT REVENUE 2023

-11%

BELOW 2019

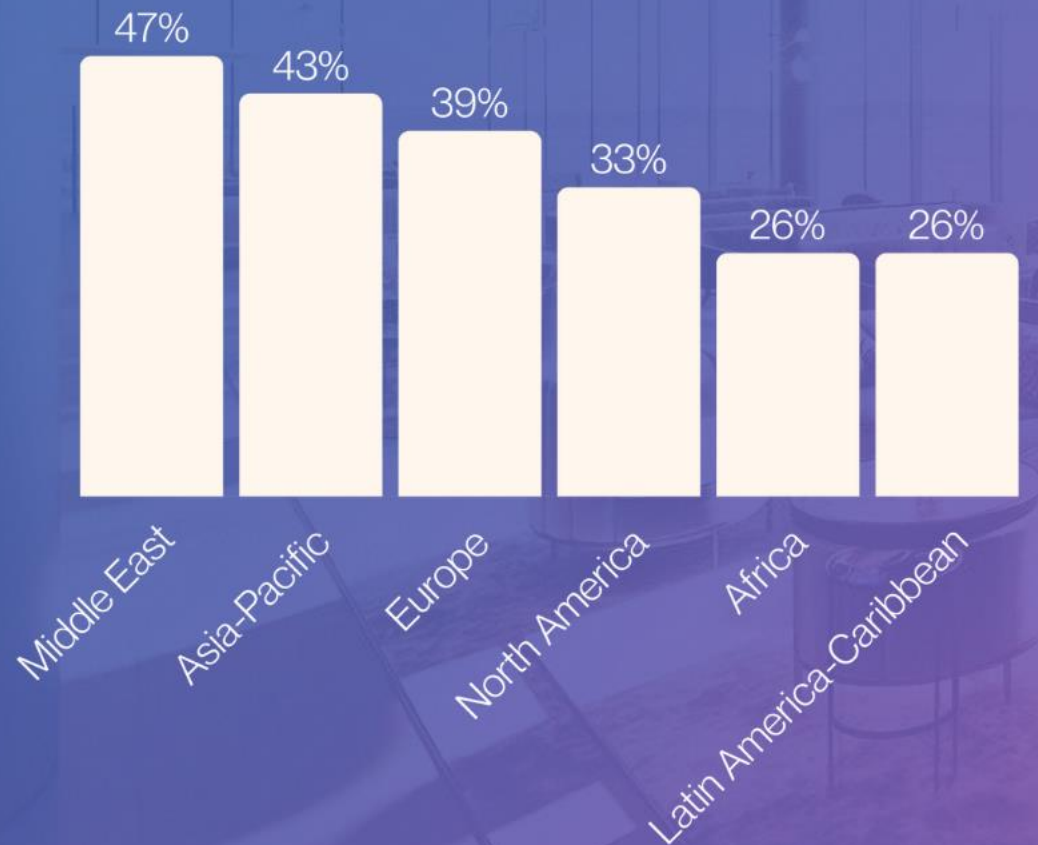
-14%

AERONAUTICAL (VS 2019)

-17%

NON-AERONAUTICAL
(VS 2019)

SHARE OF TOTAL AIRPORT REVENUE FROM NON-AERONAUTICAL SOURCES ⁽²⁰²³⁾



2025

AERONAUTICAL REVENUES
EXPECTED TO RECOVER TO
2019 LEVELS

2026

NON-AERONAUTICAL
REVENUES EXPECTED TO
RECOVER TO 2019 LEVELS

LONG-TERM GLOBAL PASSENGER FORECAST

ASIA PACIFIC – A Powerhouse of Global Aviation Growth

2043

7B Passengers

2053

9.2B Passengers

Largest
Global
Growth



MEETING THE DEMAND: WHAT IT WILL TAKE?



US\$2.4 trillion

INVESTMENT NEEDED 2021-2040

US\$1.3 trillion

INVESTMENT NEEDED IN ASIA-PACIFIC

to

Build new capacity

**Do more with existing
infrastructure**

**Enable airports to
operate like businesses**

Tackle funding challenges



AIRPORTS COUNCIL
INTERNATIONAL

How we grow is as
important as how much
we grow

AIRPORTS ARE LEADING THE WAY TO NET ZERO WITH REAL ACTIONS



Electrifying ground operations, hydrogen-powered systems



Expanding onsite renewables



Scaling Sustainable Aviation Fuels (SAF)



**The only institutionally
endorsed, global carbon
management standard for
airports**

645

AIRPORTS
ACCREDITED

55%

GLOBAL AIR
TRAFFIC COVERED

**Climate leadership
isn't solo work.**







Air connectivity fuels economies, tourism, and trade - but policy barriers hold it back.

86.5M
JOBS

3.9%
GLOBAL GDP

33%
WORLD TRADE

(DATA BY ATAG)

AIRPORTS NEED PRIORITY ACCESS TO RENEWABLE AND LOW-CARBON POWER



Airports step up by:

Investing in on-site renewables
Preparing for SAF and hydrogen
Aligning energy strategies with
regional goals

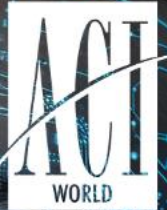


SECURITY SYSTEMS TESTING AND CERTIFICATION CAN'T HOLD US BACK

**Align global
testing to
speed
deployment**

**Promote
transparent
coordination**

**Work with industry
early so solutions
match real-world
operations**



AIRPORTS COUNCIL
INTERNATIONAL





AIRPORTS COUNCIL
INTERNATIONAL

Safe isn't enough — journey must be seamless

Passengers expect speed, ease,
and trust at every touchpoint

HOW DO WE MEASURE WHAT MATTERS TO PASSENGERS?



700K

ASQ SURVEYS
COMPLETED

50%

TRAVELLERS IN
ASQ-RATED
AIRPORTS

181

ASQ AWARDS IN
95 AIRPORTS

INCHEON SHOWS WHAT'S POSSIBLE WHEN CX CULTURE MEETS INNOVATION

An aerial photograph of the Incheon International Airport terminal, showing its large, curved, white roof and the surrounding tarmac with several aircraft parked at gates. The image is overlaid with a semi-transparent purple gradient.

1st globally

LEVEL 5 CUSTOMER EXPERIENCE ACCREDITATION

**ACI-Amadeus
Technology Innovation
Award Winner**

**Multiple-time
ASQ Award winner for
passenger satisfaction**

WE CHAMPION THE TRANSFORMATION OF AIRPORTS AND AVIATION WORLDWIDE

2181
AIRPORTS

170
COUNTRIES

95%
GLOBAL PASSENGER
TRAFFIC





**The future is
here — let's
lead it together**

제8회 세계항공컨퍼런스

WORLD AVIATION CONFERENCE 2025

The Future of Aviation Industry: Advanced Tech and Sustainability

September 2(Tue) - 4(Thu), 2025

Grand Hyatt Incheon, Republic of Korea

