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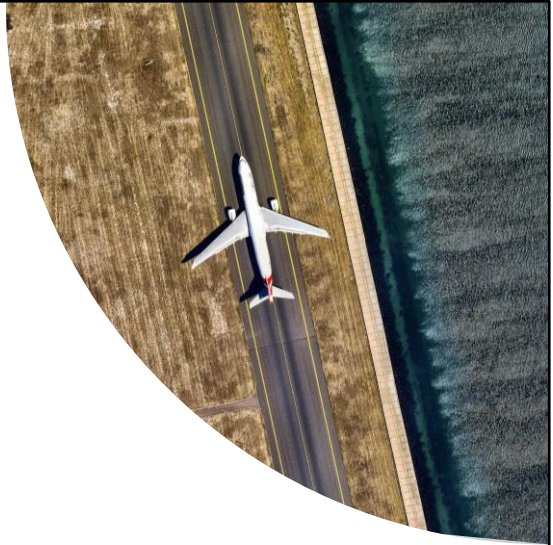
Asia-Pacific and North Asia Update

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Asia is Recovering

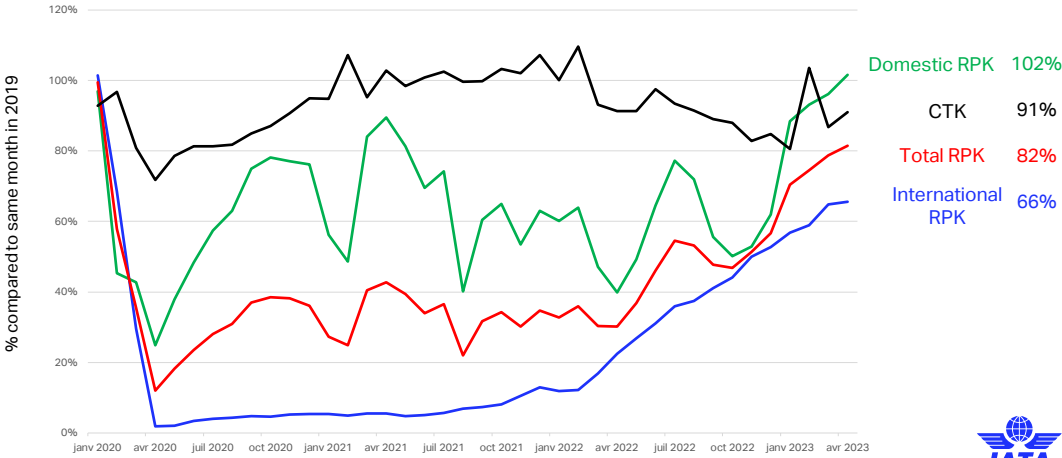


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Status of recovery in Asia Pacific

**Apr 2023
compared
to Apr 2019**



Source: IATA



Asia is Recovering

Asia leading in forward
booking data

+124%

vs 2022

*Jan to May 2023 bookings for May-Sep travel

Connectivity is at

62%

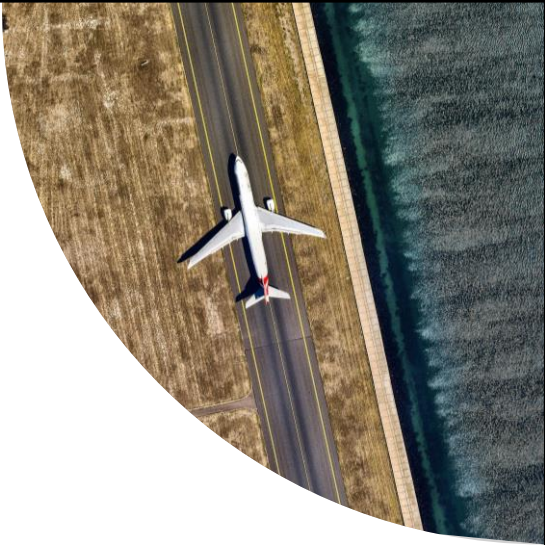
of 2019

*April 2023



Asia Pacific international: +127%

Priorities for Asia

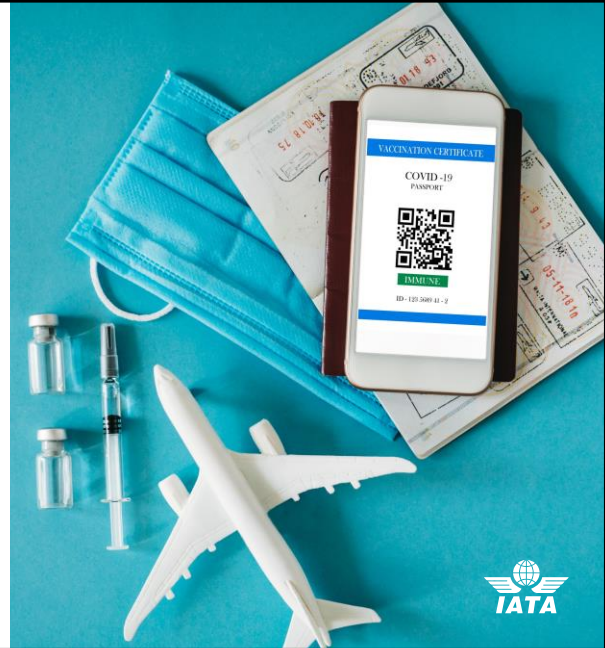


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Remove remaining COVID related requirements

- Some countries still have requirements for either vaccination or testing!



Country Specific Restrictions Still exist

Bangladesh: Vaccinated **OR** Pre-departure testing

India: Random on-arrival testing

Indonesia: Vaccination required for entry

Kiribati: Vaccination required for entry

Micronesia: Vaccination required for entry

Myanmar: Vaccinated **OR** Pre-departure testing

Nauru: Vaccination required for entry

Nepal: Vaccinated **OR** Pre-departure testing **OR** On-arrival testing

Pakistan: 1. Vaccinated **OR** Pre-departure testing 2. Random on-arrival testing (May 23)

Philippines: Vaccinated **OR** Pre-departure testing **OR** On-arrival testing

Timor Leste: Vaccinated **OR** Quarantine

Restore flight connectivity

- Readiness of the airports to handle traffic
- Return of airline capacity
- Lift flight restrictions



Asia-Pacific capacity for April 2023

- Total: 85.3% of 2019
- International 65.3% of 2019

US-China flights only at 6% of pre-COVID

Safety awareness of lithium battery cargo shipments

- Asia is the manufacturing hub for consumer devices which include lithium batteries
- Majority of lithium battery production is in Asia



Asia is the global manufacturing hub for many consumer devices which carry lithium batteries and the majority of lithium battery production is in Asia. A high portion of dangerous goods carried are lithium batteries.

Air cargo supply chain actors must be aware of lithium battery carriage risks and comply with dangerous goods regulations. Those involved in the supply chain are encouraged to enhance their competencies in handling lithium battery shipments and improve compliance with dangerous goods regulations through certification programs and digital tools. IATA developed CEIV lithium battery program and DG AutoCheck to support the industry in achieving this goal.

Maximizing operational and safety data

- Contribute to Global Aviation Data Management (GADM) database



IATA North Asia are currently engaging with some major operators in the region to invite them to join GADM

Number of GADM demo delivered or are planned to demonstrate the value of the IATA data program

20 North Asia operators are the member of IDX, 11 North Asia operators are the member of FDX.

Sustainable Aviation Fuel

- Positive developments across Asia
- Incentivize production, not mandate usage



Status in Asia

Most airlines and governments in the region are just starting out on their SAF journey.

IATA is working closely with stakeholders to collaboratively progress the SAF journey, including encouraging governments in the region to put in place SAF policies that would be conducive for the scale up in production and adoption of SAF.

There needs to be a massive scale up in SAF production for there to be sufficient supply of SAF for the industry to reach our net zero targets, which we estimate at 450 billion liters annually by 2050.

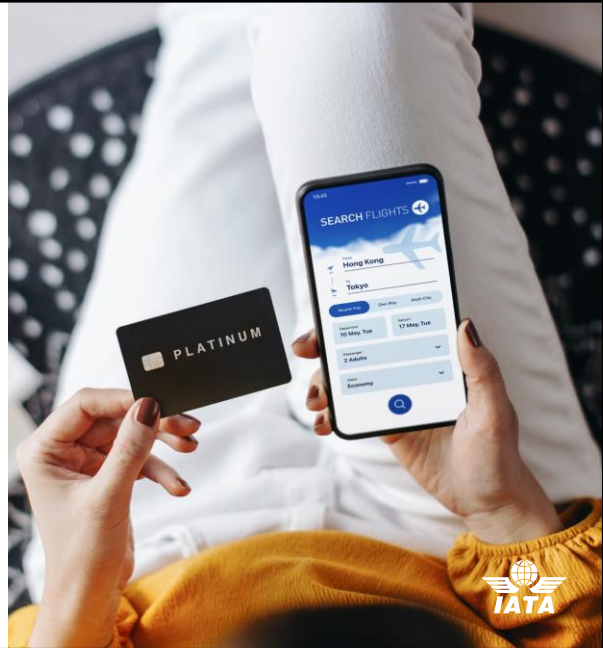
Support from governments and value-chain partners is crucial.

Government policies in particular play a pivotal role in encouraging the scaling-up of SAF production.

Mandates should only be used if they are part of a broader strategy to increase the production of SAF and complemented with incentive programs that facilitate innovation, scale-up and unit cost reduction.

Digital Transformation

- Distribution and payments
- Operational processes
 - Passenger facilitation
 - Air cargo



Modern Airline Retailing

- Aimed at transforming airline distribution into a world of “Offers and Orders”.
- NDC still relies on decade-old legacy processes, such as Passenger Name Records (PNRs), Electronic Tickets (ETs), and Electronic Miscellaneous Documents (EMDs) for the booking and payment
- There will be a need for a significant transformation of the IT infrastructure, but also the underlying processes, in order to move to a “Offers and Orders only” world.
- This will take time.
- A Consortium of advanced airline adopters have agreed to work together with IATA to accelerate the transition of our industry to Modern Airline Retailing.
- Airlines: American Airlines, Air France-KLM, British Airways, Emirates, Finnair, Iberia, Lufthansa Group, Oman Air, Singapore Airlines, Xiamen Airlines, LATAM, Qatar Airways and Turkish Airlines

OneID

- Asia Pacific passenger traffic has the potential to double over the next 20 years
- There isn't enough space or resources to double the size of airports to staff needed to handle passengers
- OneID will dramatically improve capacity at airports while enhancing customer experience, efficiency and while maintaining security of data and processes
- Ongoing trials show the technology works - we need regulators to move away from requiring paper and enabling digital processes
- India's Digiyatra is a leading example
- Other promising plans in Japan, Singapore, Australia, New Zealand

One Record

- The aim is to drive digital transformation of cargo with industry and relevant authorities.
- IATA is advocating for the removal of paper freight documents to improve the digital maturity of air cargo in each country.
- IATA's goal is to drive implementation of ONE Record worldwide by 1 January 2026.
- Given the multiple players in the cargo supply chain, this requires robust stakeholder engagement and IATA is providing support to pilots and adoption of ONE Record.
- ONE Record trials have been conducted – at least three in Hong Kong and one in Shenzhen

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