



22nd Transport Sector Coordinating Committee Meeting

16–17 June 2025 • Bishkek, Kyrgyz Republic

22-е заседание Координационного
комитета по транспортному сектору

16–17 июня 2025 года • Бишкек, Кыргызская Республика

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CAREC Aviation: Recent Developments and Market Opportunities

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CAREC international seat capacity growth by country (excluding PRC): Summer 2025 vs Summer 2024 and Summer 2019

***CAREC: the world's
fastest growing air
transport market***

Source: Sobie Aviation and OAG

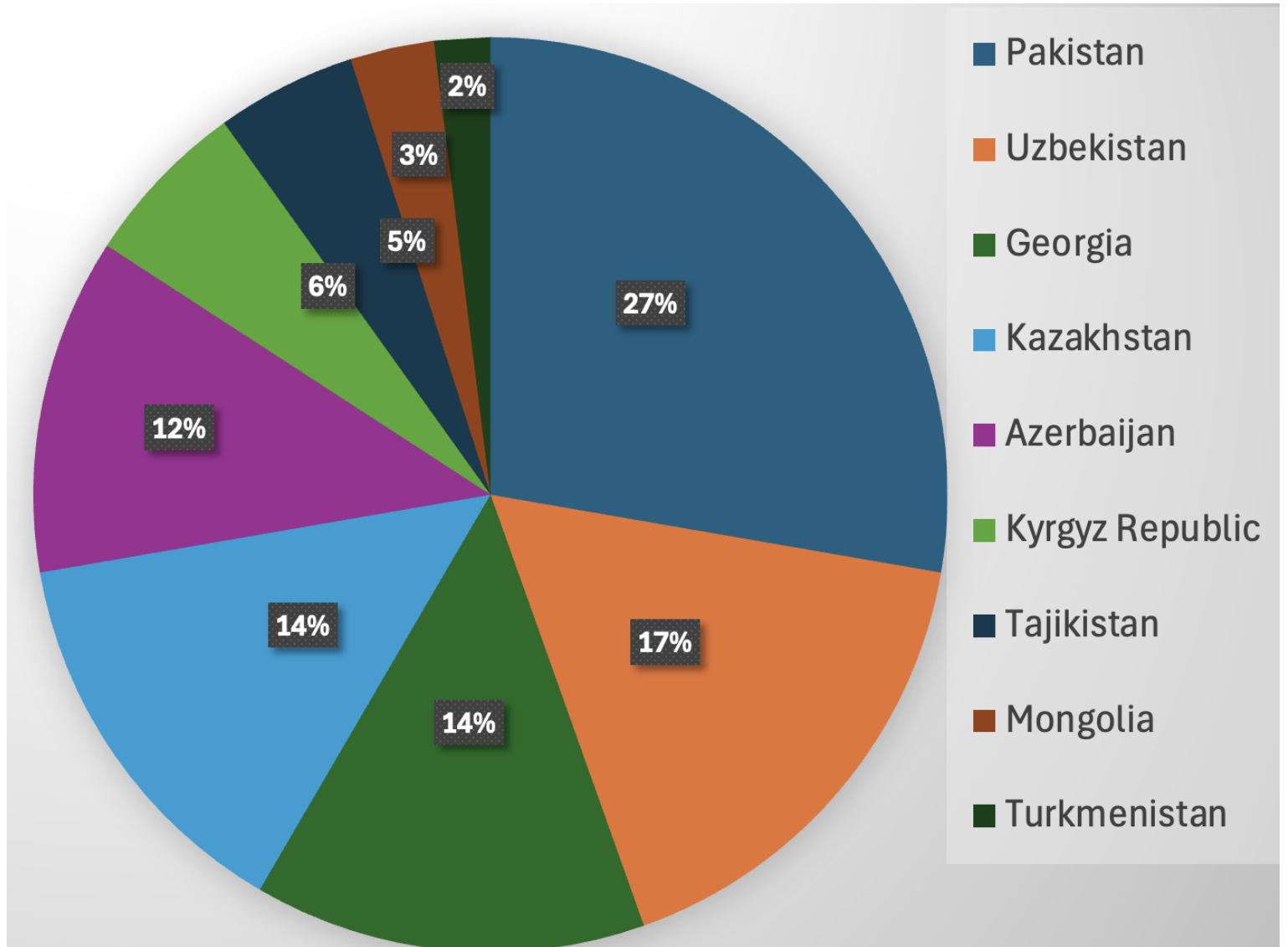
Note: Summer Schedule = 31 March to 26 October for 2024
and 2019 and 30 March to 25 October for 2025

CAREC Country	vs 2019	vs 2024
Uzbekistan	+124%	+16%
Tajikistan	+82%	+4%
Mongolia	+75%	+17%
Kyrgyz Republic	+69%	+5%
Georgia	+54%	+19%
Azerbaijan	+52%	+4%
Kazakhstan	+43%	+14%
Pakistan	+23%	+7%
Turkmenistan	+9%	+1%
CAREC total	+51%	+11%
Central Asia total	+72%	+11%
Global total	+8%	+6%

CAREC international seat capacity share by country (excluding PRC): Summer 2025

***CAREC: the world's
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Source: Sobie Aviation and OAG



Intra-CAREC international seat capacity growth by country: Summer 2025 vs Summer 2024 and Summer 2019

Improving Connectivity within CAREC

Source: Sobie Aviation and OAG
 Notes: Countries ranked by number of intra-CAREC routes in summer 2025
 Note: Summer Schedule = 31 March to 26 October for both 2024 and 2019 and 30 March to 25 October for 2025

CAREC Country	vs 2019	vs 2024	# routes (2019 & 2025)
PRC	+104%	+47%	10 → 53
Kazakhstan	+99%	+31%	21 → 44
Uzbekistan	+182%	+51%	10 → 27
Kyrgyz Republic	+58%	+30%	11 → 17
Georgia	+213%	+19%	8 → 17
Azerbaijan	+112%	+22%	9 → 15
Pakistan	+40%	+14%	5 → 13
Tajikistan	+85%	+15%	6 → 12
Mongolia	+58%	+43%	8 → 9
Turkmenistan	-60%	+1%	4 → 2
CAREC total	+105%	+34%	52 → 105

CAREC (excluding PRC) international seat capacity growth by market: Summer 2025 vs Summer 2024 and Summer 2019

Improving Connectivity

While intra-CAREC connectivity has improved it only accounts for a small share of the overall market and most intra-CAREC routes are not served daily

Market	vs 2019	vs 2024	Share (2025)
India	+233%	+19%	2%
Southeast Asia	+151%	+24%	2%
PRC	+107%	+41%	5%
Intra-CAREC	+105%	+31%	7%
Türkiye	+85%	+12%	14%
Republic of Korea	+79%	+24%	3%
Middle East	+40%	+7%	35%
Russian Federation	+36%	+1%	21%
Rest of Europe*	+9%	+15%	8%

Source: Sobie Aviation and OAG

Notes: *Rest of Europe is Europe excluding Russian Federation and Türkiye

Summer Schedule = 31 March to 26 October for both 2024 and 2019 and 30 March to 25 October for 2025

Annual passenger traffic for select CAREC airports: 2024 vs 2019 and 2023

CAREC: the world's fastest growing air transport market

Almaty is CAREC's biggest overall airport (including domestic and international traffic) but Tashkent is the biggest international airport

Total passenger traffic (includes domestic) across all airports in Kazakhstan reached 30.0 million in 2024 and 13.5 million in Uzbekistan

Airport	2024 traffic (in millions)	Vs 2019	Vs 2023
Almaty (ALA)	11.43	+78%	+20%
Tashkent (TAS)	8.72	+94%	+28%
Baku (GYD)	7.54	+60%	+33%
Islamabad (ISB)	6.17	+14%	+9%
Tbilisi (TBS)	4.75	+29%	+29%
Dushanbe (DYU)	2.34	+65%	+5%
Ulaanbaatar (UBN)	2.17	+37%	+25%
Kutaisi (KUT)	1.72	+97%	+3%
Samarkand (SKD)	1.38	+186%	+36%

Source: Sobie Aviation and airport reports

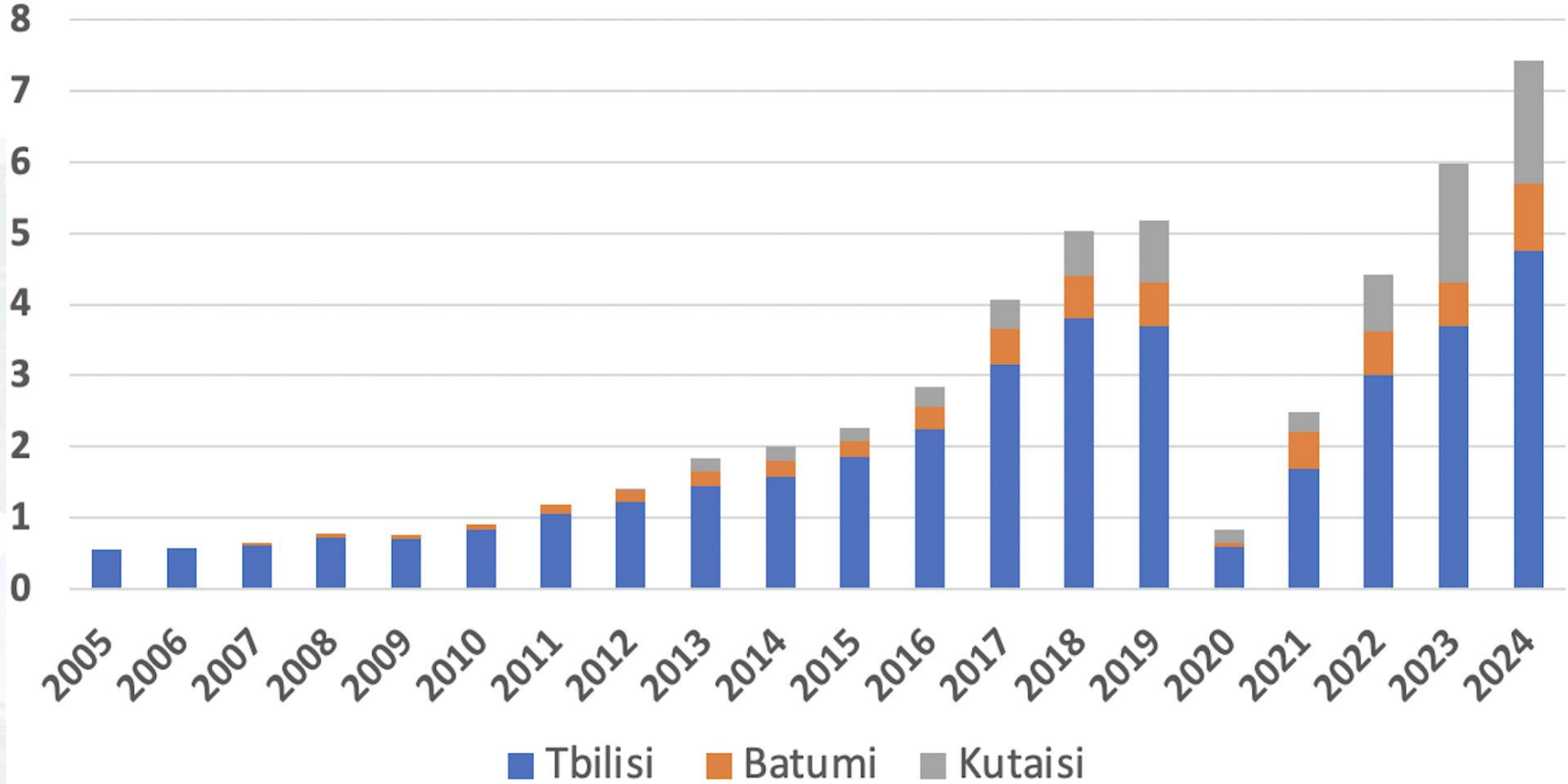


***ADB's role in
CAREC
Aviation:
Airports***

- Rapid traffic growth is putting pressure on airports across CAREC
- In response CAREC countries are planning major expansion of existing airports and development of new airports
- In Georgia, ADB supported an airport sector assessment study and is now supporting the potential new international airport outside Tbilisi, starting with a feasibility study
- The new airport at Vaziani will be developed on a 500-hectare site with the first phase expected to be completed by 2031 with initial capacity for 10 to 12 million passengers per annum

Georgia passenger traffic in millions: 2005 to 2024

ADB's role in CAREC Aviation: Airports



In the decade before COVID, passenger traffic grew from 750,000 in 2009 to 5.2 million in 2019 for an annual growth rate of 21%

***ADB's role in
CAREC
Aviation:
Airports***

- ADB assessed the potential feasibility of airport PPPs in Bishkek and Astana
- ADB reviewed airport tariff policies and funding mechanisms for smaller airports in Kazakhstan
- ADB is now assessing the state of digitalization at airports in Uzbekistan and Tajikistan

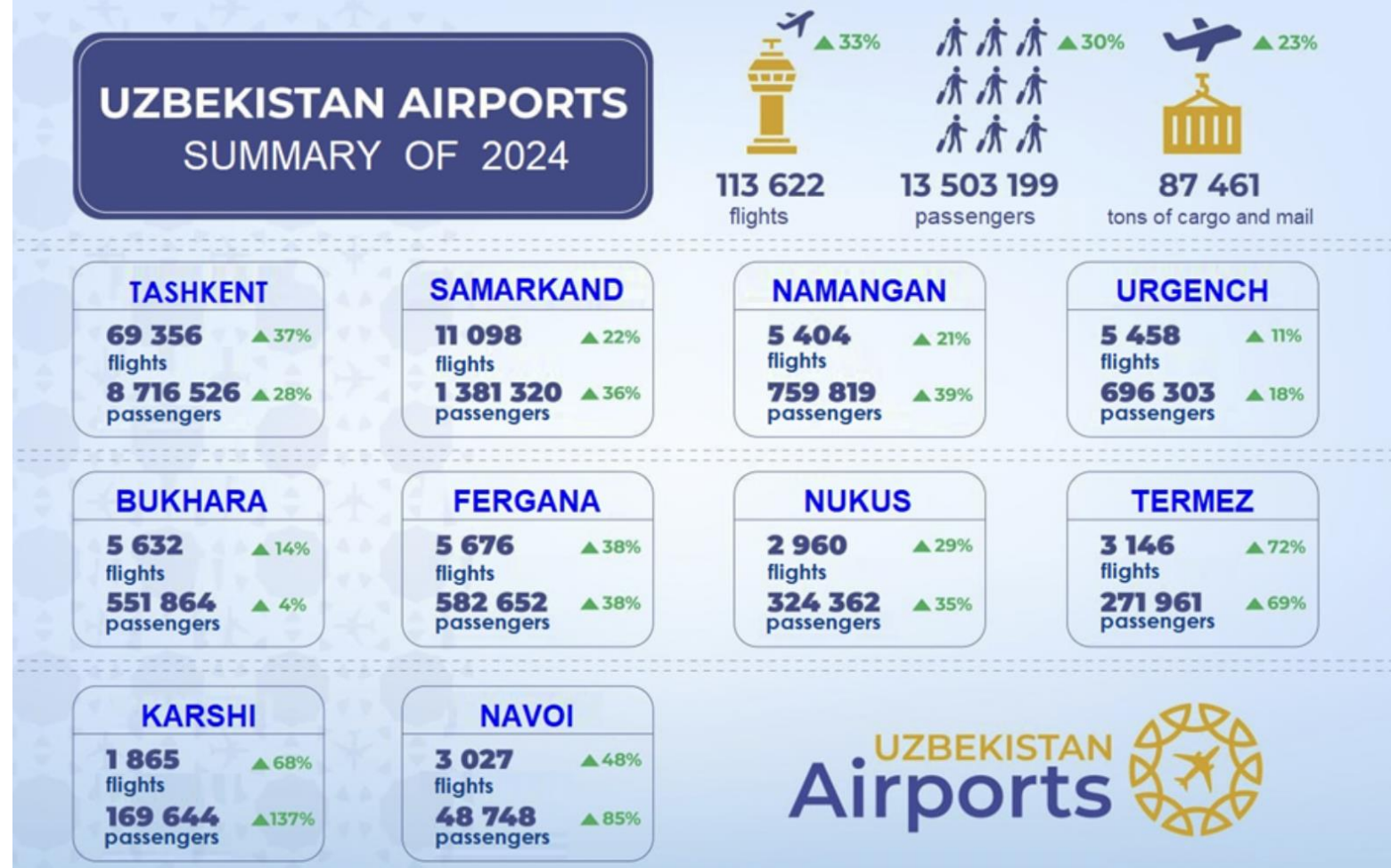




ADB's role in CAREC Aviation: Digitalization

- Uzbekistan's Ministry of Transport requested in 2024 technical assistance from ADB to support the development of a comprehensive digitalization strategy and roadmap that enhances the performance of five transport subsectors including aviation
- The aviation subsector assessment was conducted from 3 June 2025 to 12 June 2025 with stakeholder consultations with all eight Uzbek passenger airline as well as foreign airlines, Uzbekistan Airports, the Civil Aviation Authority, the Ministry of Transport and UZAeroNavigation

ADB's role in CAREC Aviation: Digitalization



Digital technologies can help improve efficiency and service levels, resulting in better utilization of limited infrastructure. There are now 19 airports in Uzbekistan with scheduled commercial services, including 11 airports with international designation (Andijan recently reopened) and 8 small domestic airports that have opened or reopened over the last two years

ADB's potential role in CAREC Aviation: Domestic Market Sustainability

- In addition to Uzbekistan several small domestic airports have recently opened in Azerbaijan, Kyrgyz Republic and Tajikistan
- New domestic airlines have been launched in Kyrgyz Republic (Asman Airlines) and Uzbekistan (Silk Avia); Tajik Air has relaunched and there is also a proposal to launch a new domestic airline in Georgia
- CAREC could study strategies and policies for connecting smaller communities, including potential zero carbon small aircraft



ADB's potential role in CAREC Aviation: Domestic Market Sustainability

- Small electric and hybrid electric aircraft should be under evaluation given the increased focus on sustainable tourism and sustainable aviation
- Airlines in other parts of the world (Europe, North America, Australia/New Zealand) are actively engaged and have committed to electric aircraft
- A CAREC country could also be an ideal testing ground for small electric aircraft, potentially replacing the LET 410 (used in Georgia and Uzbekistan) and the An-28 (used in Tajikistan)



ADB's role in CAREC Aviation: Earlier Studies



AVIATION AND THE ROLE OF CAREC
A SCOPING STUDY

SEPTEMBER 2018



IMPACT OF COVID-19
ON CAREC AVIATION
AND TOURISM

FEBRUARY 2021



LOW-COST CARRIER OPPORTUNITIES,
AIR TRANSPORT LIBERALIZATION, AND
POST-PANDEMIC RECOVERY IN CAREC

MAY 2024



ADB's potential role in CAREC Aviation: Intra-CAREC Connectivity

- CAREC could also study opportunities and mechanisms for improving regional international connectivity within CAREC
- Several countries still do not have any connectivity with each other and many have very limited flights
- More routes and more flights on existing routes are critical to support trade, economic development and multi-country Silk Road itineraries
- Land border crossings also need to be significantly improved to support tourism/multi-country itineraries

Recommendations from draft CAREC study (August 2024):

- 1) CAREC countries should work on improving air connectivity within the region to facilitate multi-country itineraries, intra-CAREC tourism and economic ties.
- 2) Central Asian countries should work together to provide a better and faster service at border crossings for international tourists.
- 3) CAREC countries should consider constructing joint border crossing facilities

Intra-CAREC Connectivity: Land Borders



- Border crossings in CAREC are not tourist friendly and congested with no signs, services and amenities – and no digitalization
- Joint Border Crossing Facilities or One Stop Border Posts (OSBCs) are needed to improve service standards and avoid long unsheltered walks
- Green lanes for tour buses, staff training and better services are needed

ADB's potential role in CAREC Aviation: Intra-CAREC Connectivity

- There are now over 100 routes connecting CAREC countries, including over 50 CAREC-PRC routes
- But only 20% of these routes are served daily
- PRC and the five Central Asian countries have agreed to jointly develop the “Air Silk Road,” leading to several new recently launched PRC-Central Asia routes
- Several new intra-Central Asia routes have been launched this year or last year (Almaty-Tashkent and Bishkek-Tashkent also have new competitors)

New route	Airline	New route	Airline
Almaty-Issyk Kul	Asman Airlines, FlyArystan	Dushanbe-Astana	Somon Air
Almaty-Nukus	Uzbekistan Airways	Samarkand-Shymkent	Qazaq Air
Almaty-Osh	Air Astana	Tashkent-Atyrau	FlyArystan
Bishkek-Namangan	Centrum Air	Tashkent-Issyk-Kul	Centrum Air, Silk Avia
Bishkek-Khujand	Asman Airlines	Tashkent-Osh	Aero Nomad



***ADB's potential role
in CAREC Aviation:
Intra-CAREC
Connectivity and
Air Navigation***

- The 2024 “Air Silk Road” agreement with PRC and Kyrgyz Republic has led to plans for a new airspace corridor that is expected to open later this year from Kashgar to the border
- This will be only the second corridor between the two countries and will open opportunities for airlines to launch flights from Kashgar to Bishkek, Osh, Almaty, Tashkent and other cities
- There are opportunities for CAREC to support more new air corridors as well as digitalization of terrain maps/aeronautical charts and the implementation of Performance-based Navigation (PBN) – initiatives that can improve efficiency, reduce fuel burn and increase the viability of potential new routes

THANK YOU!



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