

From recovery to takeoff:

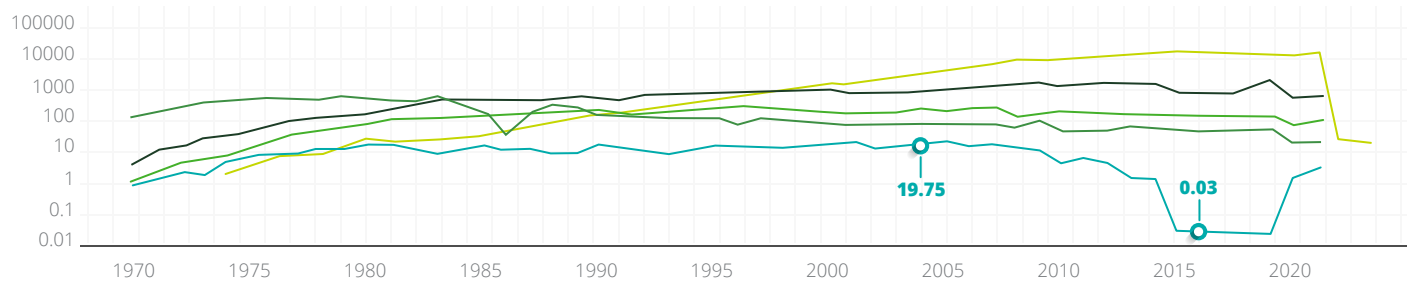
Structuring the
development of Syria's
aviation sector

The Syrian aviation sector appears to be gradually reopening after a period of restricted activities, with international passenger carriers returning to the market as sanctions lift.¹ Emirates, Etihad, and Qatar have all stated their intent to operate services to Damascus,^{2,3,4} after airspace was reopened in June 2025.⁵ Intermittent disruption in the region has caused some subsequent service cancellations, and other international operators still seem reluctant to re-enter the market.

Despite this, Syrian air passenger and freight throughput volumes are showing

signs of an increase (Figure 1 and Figure 2). Throughput may not have yet reached historic highs, but there have been significant signs of confidence in the market—not only from airlines, but also from foreign governments and investors. Qatar-based UCC Holding and US-based Assets Investments have been reported to have agreed on making multi-billion-dollar investments in Damascus International Airport’s redevelopment.^{6,7} These are not just limited to the airport, but extend to purchasing narrow-body planes, showing a commitment to the sector as a whole.

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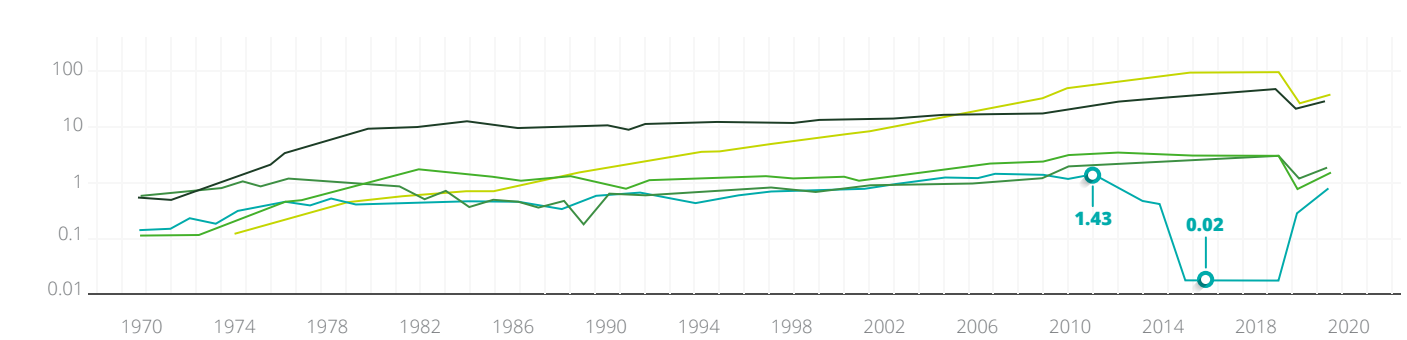


Key headings

UAE Jordan Syrian Arab Republic Lebanon Saudi Arabia

Figure 1: Air freight carried per year (million ton-km)

Source: Civil Aviation Statistics of the World, International Civil Aviation Organization (ICAO)



Key headings

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Figure 2: Air passengers carried per year (million)

Source: Civil Aviation Statistics of the World, International Civil Aviation Organization (ICAO)

This show of confidence is likely rooted not only in foreign interests’ desire to promote regional stability, but also in their recognition in Syria’s potential for growth. Syria’s recent GDP figures (Figure 3) unsurprisingly describe a lower national productivity than its historic highs; it remains to be seen, however, when and if it will return to its historic norms.

As these promised investments come into the country, both state and private entities must carefully balance their short- and long-term objectives. State entities should aspire for lasting and broad benefits to the populace, and private investors must consider what returns are reasonable to cover their costs and risks. Investing in aviation can be fruitful if done carefully, but there are some wider infrastructural requirements that need to be considered beforehand. ➤

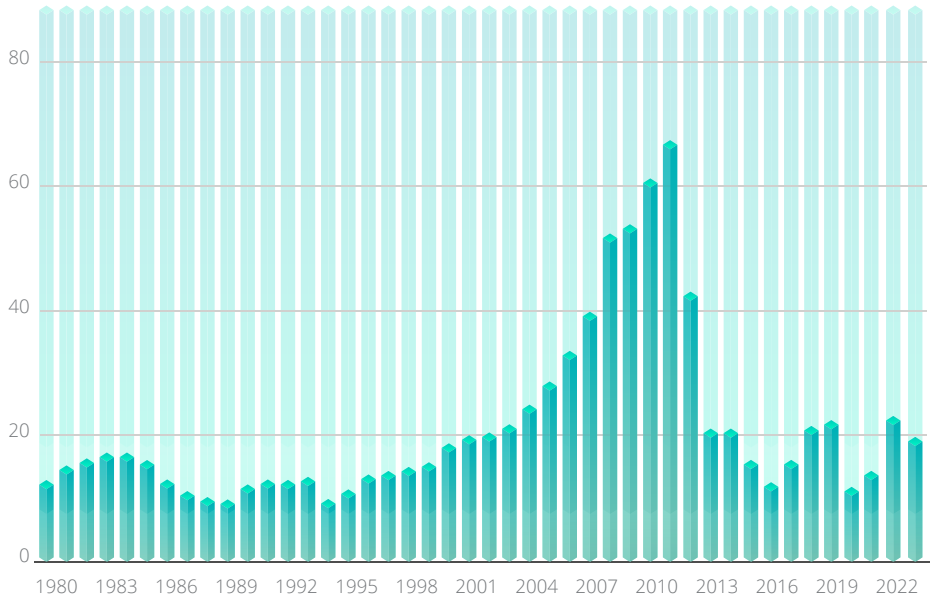
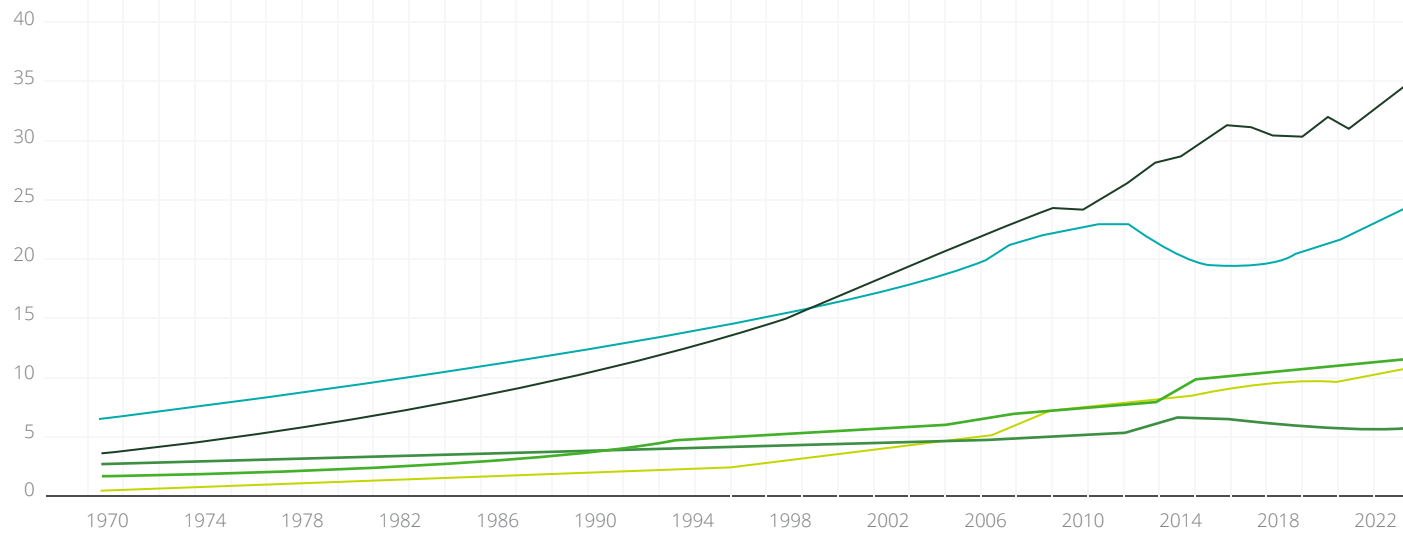


Figure 3: Syrian Arab Republic GDP (Current USD bn)

Source: Country official statistics, National Statistical Organizations and/or Central Banks; National Accounts data files, Organization for Economic Co-operation and Development (OECD); Staff estimates, World Bank (WB)



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Figure 4: National population (million)

Source: United Nations (UN)

✈ Requirements for functional aviation

Functional regulation and legal frameworks

Aviation is a highly regulated sector, and members of the aviation ecosystem can be subject to intense scrutiny. Operators will want to ensure they can deliver safe services and trust that a fair and reliable legal framework is in place. Syria has demonstrated its awareness of this requirement and has taken steps to build market confidence by agreeing to work with the International Civil Aviation Organization (ICAO)⁸ to align with international standards. The return of foreign airlines to Syria shows that these steps have already helped restore confidence in the market.

Enabling infrastructure

The coupling of aviation activities to broader transport and logistics capacity is clear. Aside from having well-equipped airports, a country must have a developed and well-connected ground transportation network and logistics facilities to unlock greater value for both sector participants and all linked industries. Syria's Logistics Performance Index, a score indicating the health and reliability of the logistics sector in a country, has been volatile over the past few decades compared to its peers (Figure 5). For the aviation sector to develop to its potential, enabling infrastructure must also be prioritized in plans for growth.

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Human capital and ancillary services

The most critical part of the aviation sector is its people. The list of roles requiring highly qualified staff is long: pilots, engineers, cabin crew, air traffic controllers, ground handling staff, security staff, and inspectors are just some of the people involved in keeping planes, passengers, and cargo moving. Foreign entities have already shown Syria they are committed to helping it develop the sector: a memorandum of understanding between Syria's General Authority of Civil Aviation and Qatar's Civil Aviation Authority was signed earlier this year.⁹ The scope of this document is wide, but explicitly covers training and development.

Demand

The requirement underpinning everything, as always, is demand for services. Without the passengers or cargo to fill planes, the sector will not grow and the broader benefits to the economy will not be realized. The recent investments promised may give the sector some energy to attract new customers, but it will take time to see if these will pay off. Air passenger and freight throughput are moving in the right direction, but the data don't yet show a return to historic highs.

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A sector with potential
A further developed Syrian aviation sector would bring increased connectivity and have significant positive impacts to the country and its environs. Becoming better connected with both its neighbors and countries further afield would bring opportunities for improved trade, provide greater transport access for nationals and tourists, and ultimately contribute towards Syria restoring and improving on its historic productivity.

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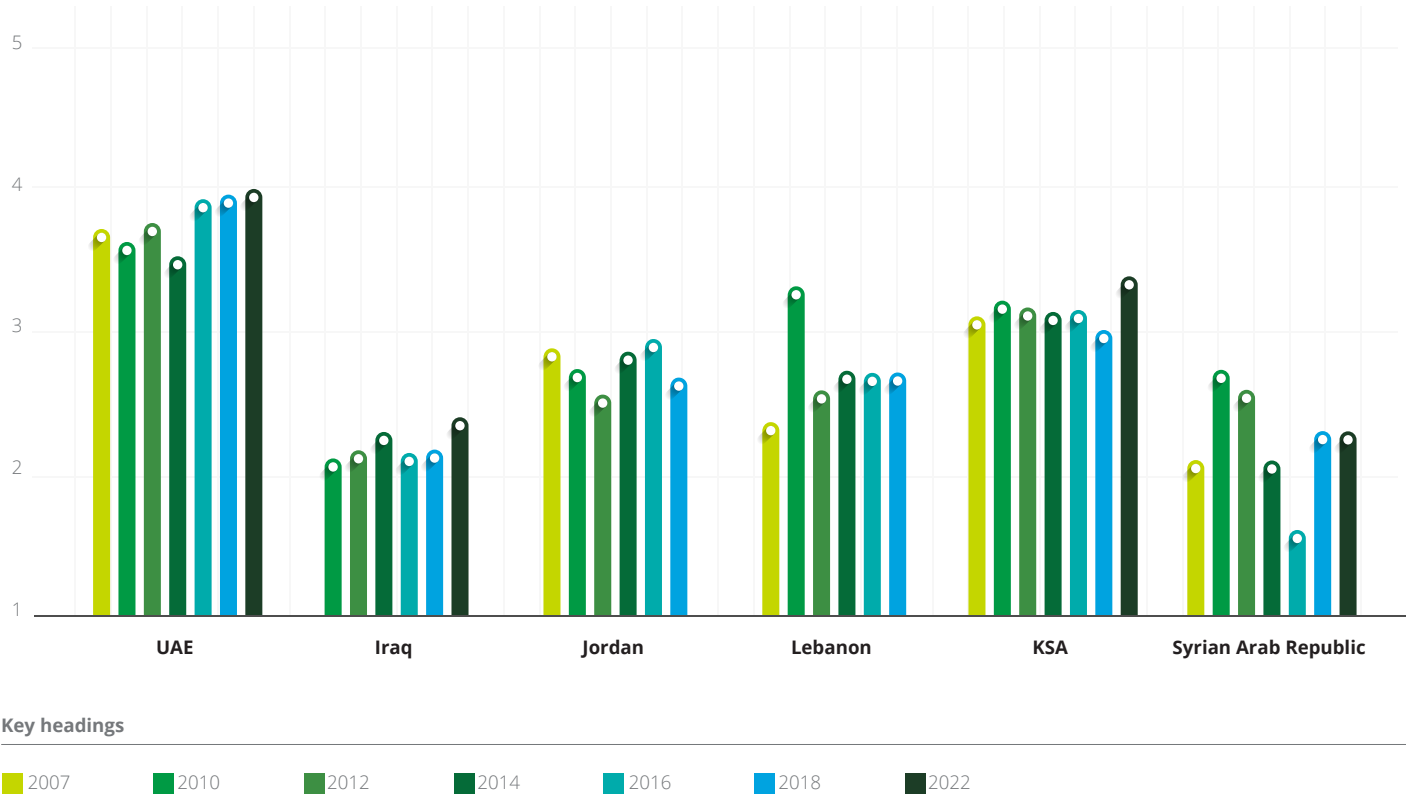


Figure 5: Logistics Performance Index of selected countries (1 = low, 5 = high)

Source: World Bank (WB)

Endnotes

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