

# ECONOMIC DEVELOPMENT

# JUL 2019: Air Transport Monthly Monitor

World Results and Analyses for MAY 2019. Total scheduled services (domestic and international).

http://www.icao.int/sustainability/Pages/Air-Traffic-Monitor.aspx								
GLOBAL KEY FIGURES	MAY 2019 (versus MAY 2018)				OUTLOOK* - JUN 2019 (versus JUN 2018)			
	<b>RPK ▲</b> +4.5%	<b>ASK ▲</b> +2.7%	<b>FTK ▼</b> -3.4%	<b>LF</b> : 81.5% ▼ -1.3 pt	ASK ▲ +3.5% * Source OAG			

## PASSENGER TRAFFIC

### **Revenue Passenger-Kilometres** - **RPK**

World passenger traffic grew by +4.5% YoY in May 2019, +0.2 percentage point higher than the growth in the previous month. Although there was a slight improvement, this growth remained to be one of the weakest performances in the last five years. Both Europe and the Middle East posted a slowdown, with the latter experiencing a negative growth, reflecting changes in the airline business in the region. Russian Federation recorded the fastest domestic traffic growth, followed by China and Japan.



#### **International Traffic vs. Tourist Arrivals**

International passenger traffic grew by +4.3% YoY in May 2019, -0.8 percentage point lower than the growth in the previous month. Latin America/Caribbean, Asia/Pacific, and Africa accelerated in traffic growth. Europe, however, experienced the biggest deceleration, followed by the Middle East which became the slowest growing region.

The growth of international tourist arrivals\* remained relatively stable.



# **FREIGHT TRAFFIC**

ACRONYMS

#### Freight Tonne-Kilometres - FTK

World freight traffic reported a decline of -3.4% YoY in May 2019, +1.3 percentage points higher than the growth in the previous month. Freight traffic started to trend downwards since the end of last year, except for a short-lived growth in March. All regions posted negative growth, except for Africa and Latin America/Caribbean. Africa outperformed other regions, followed by Latin America/Caribbean, albeit with a slight slowdown. Freight growth remained depressing, affected by the global trade tensions. The most significant fall was observed in the Middle East and Asia/Pacific, which together accounted for almost half of world air freight traffic volume.

# CAPACITY

#### Available Seat-Kilometres - ASK

**Capacity worldwide increased by +2.7% YoY in May 2019**, -0.9 percentage point lower than the growth in the previous month (+3.6%).

According to the airline schedules, capacity expansion is expected to rise up to +3.5% in June 2019.



#### Load Factor - LF

The passenger Load Factor reached 81.5% in May 2019, -1.3 percentage points lower than the LF recorded in the previous month.

As traffic growth outpaced the capacity expansion, the May LF was +1.4 percentage points higher compared to the rate in the same period of 2018.





ACI: Airports Council International; ASK: Available Seat-Kilometres; IATA: International Air Transport Association; FTK: Freight Tonne-Kilometres; LF: Passenger Load Factor; OAG: Official Airline Guide; RPK: Revenue Passenger-Kilometres; UNWTO: World Tourism Organization; YOY: Year-on-year; YTD: Year-to-date.



# JUL 2019: Air Transport Monthly Monitor

World Results and Analyses for May 2019. Total scheduled services (domestic and international)

#### Air Transport Bureau E-mail: ecd@icao.int

#### >> Continued from page 1

## TOP 15 AIRPORTS (Ranked by aircraft departures, passengers and volume of freight)

#### MAY 2019: +2.9%, +3.2%, and -3.2% YoY in terms of aircraft departures, passengers and freight for the Top 15

Airports (ranking by number of departures)	Departures	ΥοΥ	Airports (ranking by number of passengers)	Passengers*	ΥοΥ	Airports (ranking by tonnes of freight)	Freight**	ΥοΥ
Atlanta GA, US (ATL)	39,423	1.3%	Atlanta GA, US (ATL)	4,944,960	3.7%	Hong Kong, CN (HKG)	396,000	-7.5%
Chicago IL, US (ORD)	39,309	2.8%	Beijing, CN (PEK)	4,115,961	-1.4%	Memphis TN, US (MEM)	379,192	-0.9%
Dallas/Fort Worth TX, US (DFW)	30,702	7.8%	Los Angeles CA, US (LAX)	3,806,725	1.9%	Shanghai, CN (PVG)	299,695	-6.1%
Los Angeles CA, US (LAX)	29,117	-4.0%	Chicago IL, US (ORD)	3,731,773	<b>1</b> 3.0%	Anchorage AK, US (ANC)	236,672	-2.5%
Denver CO, US (DEN)	26,821	7.2%	Tokyo, JP (HND)	3,483,952	-2.6%	Louisville KY, US (SDF)	226,884	8.5%
Charlotte NC, US (CLT)	24,607	2.8%	London, GB (LHR)	3,384,685	1.3%	Incheon, KR (ICN)	220,756	-8.1%
Beijing, CN (PEK)	24,392	-6.4%	Shanghai, CN (PVG)	3,282,392	<b>6</b> .7%	Dubai, AE (DXB)	194,082	🕹 -12.3%
Amsterdam, NL (AMS)	23,256	1.2%	Dallas/Fort Worth TX, US (DFW)	3,278,296	1.9%	Miami FL, US (MIA)	190,152	2.2%
Frankfurt, DE (FRA)	23,091	1.0%	Paris, FR (CDG)	3,230,426	6.2%	Doha, QA (DOH)	189,778	2.9%
Paris, FR (CDG)	21,927	1.9%	Amsterdam, NL (AMS)	3,220,737	1.6%	Taipei, CN (TPE)	182,784	-6.4%
Shanghai, CN (PVG)	21,912	2.7%	Frankfurt, DE (FRA)	3,112,863	1.5%	Frankfurt, DE (FRA)	174,849	1.6%
Las Vegas NV, US (LAS)	21,059	6.3%	Hong Kong, HK (HKG)	3,110,500	3.2%	Singapore, SG (SIN)	171,800	4.8%
London, GB (LHR)	20,868	1.0%	Denver CO, US (DEN)	3,020,928	1 9.6%	Los Angeles CA, US (LAX)	171,062	-6.2%
Houston TX, US (IAH)	20,174	<b>1</b> 5.3%	Incheon, KR (ICN)	2,911,455	6.8%	Beijing, CN (PEK)	167,587	-3.0%
Phoenix AZ, US (DVT)	20,166	17.6%	Guangzhou, CN (CAN)	2,880,808	2.0%	Paris, FR (CDG)	167,000	3.1%

Note: Total scheduled and non-scheduled services

In terms of aircraft departures, the Top 15 airports reported a growth of +2.9% YoY. Thirteen out of the Top 15 airports posted YoY increases. Atlanta remained at 1st with a modest growth of +1.3%. The strongest growth in operations was recorded by Phoenix at +17.6%, followed by Dallas/Fort Worth at +7.8%.

In terms of passengers, the Top 15 airports reported a growth of +3.2% YoY. All the Top 15 airports posted YoY increases, except for Beijing and Tokyo with a decline of -1.4% and -2.6%, respectively. Atlanta remained 1st with a growth of +3.7%. The highest growth was reported by Dallas/Fort Worth at +9.9%, followed by Denver at +9.6%

In terms of freight, the Top 15 airports reported a decline of -3.2% YoY. Ten out of the Top 15 airports posted YoY declines, mostly in Asia/Pacific and North America. The sharpest decrease was posted by Dubai (-12.3%), followed by Incheon (-8.1%) and Hong Kong (-7.5%). Louisville outperformed the other major freight hubs and was up by +8.5%.

# TOP 15 AIRLINE GROUPS (Ranked by RPK)

#### MAY 2019: +5.0% YoY in terms of RPK for the Top 15

In terms of RPK, the Top 15 airline groups accounted for 48.7% of world total RPK in May 2019 and grew by +5.0% YoY. This growth was +0.5 percentage point higher than the world average on scheduled services. Twelve out of the Top 15 airline groups posted YoY increases.

For the third consecutive time, Delta ranked 1st with a solid growth of +7.0%, followed by United, rising at +4.3% YoY. American continued to be 3rd with a marginal growth of +0.8%. Southwest slipped by -0.8% and remained at 10th.

Emirates continued to trend downwards with a negative growth of -9.5% and dropped by 2 positions to 8th. Qatar recorded the highest growth among the Top 15 airlines for the second time this year, at a staggering +18.6% albeit, remained at 13th.

Lufthansa and AF-KLM grew modestly by +5.8% and +4.8%, and remained 4th and 5th, respectively. IAG recorded a solid growth at +6.0% and elevated by 1 position to 6th. Ryanair posted the second-highest growth among the Top 15 at +12.5% albeit remained at 12th. Turkish Airlines remained unchanged and retained its position.

China Southern recorded a solid growth at +9.5% and ranked 1 position up to 7th. Air China, China Eastern and Singapore Airlines grew solidly by +8.4%, +11.4% and +8.0%, and remained at 9th, 11th and 15th, respectively.

#### CAPACITY BY REGION (ICAO Statistical Regions)

and Vueling ACRONYMS



Worldwide capacity expanded by +2.7% YoY in May 2019. All regions posted a slowdown in capacity expansion, except for minor acceleration in the Asia/Pacific. Despite the deceleration, Europe continued to be the fastest-growing region. For the second consecutive month. the Middle East was the only region posting negative capacity growth resulting in a unchanged YTD capacity expansion, the slowest among all regions.

Note: Total scheduled and non-scheduled services

(Source: ICAO, airlines' websites)

**MAY 19** 

(Source: ACI)

Airports Council International; ASK: Available Seat-Kilometres; IATA: International Air Transport Association; FTK: Freight Tonne-Kilometres; LF: Passenger Load Factor; OAG: Official Airline Guide: RPK: Revenue Passenger-Kilometres: UNWTO: World Tourism Organization: YoY: Year-on-vear: YTD: Year-to-date



