

# **ECONOMIC DEVELOPMENT**

## DEC 2020: Air Transport Monthly Monitor

World Results and Analyses for OCT 2020. Total scheduled services (domestic and international).

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

http://www.icao.int/sustainability/Pages/Air-Traffic-Monitor.aspx

**GLOBAL KEY FIGURES** 

OCT 2020 (versus OCT 2019)

RPK ▼ -70.6% ASK ▼ -59.9% FTK ▼ -6.2%

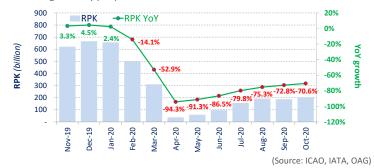
OUTLOOK\* - NOV 2020
(versus NOV 2019)

**ASK ▼** -58.1% \* Source OAG

### PASSENGER TRAFFIC

#### Revenue Passenger-Kilometres - RPK

World passenger traffic fell by -70.6% YoY in October 2020, +2.2 percentage points up from the decline in the previous month. The pace of recovery moderated further amid the resurgent epidemics and stricter containment measures. Europe was the main contributor to the moderation, being the only region with deteriorated traffic decline. On the contrary, Africa and Latin America/Caribbean have shown more resilience. Domestic travel in China demonstrated the best performance with traffic recovering to nearly pre-pandemic levels.



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

International passenger traffic fell by -87.8% YoY in October 2020, +1.0 percentage point up from the decline in the previous month. Improvements in international travel continued to be insignificant with subdued demand and ongoing cross-border travel restrictions across all regions.

The international tourist arrivals also remained stagnant and followed a similar trend as international passenger traffic.



### **CAPACITY**

#### Available Seat-Kilometres - ASK

**LF**: 60.2% ▲ +0.1 pt

Capacity worldwide fell by -59.9% YoY in October 2020, +3.1 percentage points up from the decline in the previous month (-63.0%).

In light of the renewed outbreaks, airlines' resumption of operations is likely to slow down, and the contraction in world capacity in November is expected to be at -58.1% YoY.



### Load Factor - LF

The passenger Load Factor reached 60.2% in October 2020, +0.1 percentage point higher than the previous month.

As the fall in air travel demand was still deeper than capacity cut, the October LF was -21.8 percentage points lower than the rate in the same period of 2019.



### (Source: IATA)

### FREIGHT TRAFFIC

### Freight Tonne-Kilometres - FTK

World freight traffic reported a decline of -6.2% YoY in October 2020, +1.8 percentage points up from the fall in the previous month. Demand in air cargo continued to recover significantly faster than air travel demand, despite at a slightly eased pace. The main cause of the overall moderation was the softening in North America and Africa, particularly in the latter. Nevertheless, the two regions remained as the strongest performing ones and have returned to pre-crisis levels since September. Moreover, the recovery in the Middle East stalled, affected by a weaker demand to/from Africa. Improvements were recorded by the remaining regions with a particularly brisk upswing in Latin America/Caribbean.





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

OCT 2020: -28.1%, -36.9%, and +6.2% YoY in terms of aircraft departures, passengers and freight for the Top 15

OCT 20

(Source: ACI)

Airports (ranking by number of departures)	Departures	YoY	Airports  (ranking by number of passengers)	Passengers*	YoY	Airports (ranking by tonnes of freight)	Freight**	YoY
Atlanta GA, US (ATL)	23,680	<b>↓</b> -38.1%	Guangzhou, CN (CAN)	2,473,198	<b>↓</b> -22.1%	Memphis TN, US (MEM)	410,851	<b>1</b> 8.9%
Dallas/Fort Worth TX, US (DFW)	22,750	<b>-26.8%</b>	Chengdu, CN (CTU)	2,405,190	<b>↓</b> -1.1%	Hong Kong SAR, CN (HKG)	400,000	<b>↓</b> -4.6%
Chicago IL, US (ORD)	21,919	<b>↓</b> -47.0%	Beijing, CN (PEK)	2,217,211	<b>-</b> 48.7%	Shanghai, CN (PVG)	331,799	<b>1</b> 3.2%
Denver CO, US (DEN)	19,756	<b>↓</b> -29.2%	Shenzhen, CN (SZX)	2,122,981	<b>↓</b> -7.9%	Anchorage AK, US (ANC)	302,452	<b>1</b> 26.4%
Guangzhou, CN (CAN)	19,460	<b>↓</b> -7.3%	Shanghai, CN (PVG)	1,950,355	<b>-37.9%</b>	Incheon, KR (ICN)	253,690	<b>1</b> 5.8%
Shanghai, CN (PVG)	17,824	<b>↓</b> -17.3%	Dallas/Fort Worth TX, US (DFW)	1,908,009	<b>-</b> 40.2%	Louisville KY, US (SDF)	249,513	<b>4</b> .9%
Charlotte NC, US (CLT)	17,280	<b>↓</b> -31.8%	Shanghai, CN (SHA)	1,889,753	-6.2%	Taipei, CN (TPE)	223,572	<b>1</b> 4.6%
Shenzhen, CN (SZX)	16,113	<b>1</b> 2.1%	Atlanta GA, US (ATL)	1,794,660	<b>↓</b> -62.3%	Doha, QA (DOH)	208,771	<b>6.1%</b>
Chengdu, CN (CTU)	16,089	<b>1</b> 3.0%	Xi'An, CN (XIY)	1,793,609	<b>-12.6%</b>	Los Angeles CA, US (LAX)	200,684	<b>1</b> 5.8%
Phoenix AZ, US (DVT)	15,843	<b>↓</b> -21.6%	Kunming, CN (KMG)	1,771,971	<b>-11.8%</b>	Chicago IL, US (ORD)	193,549	<b>1</b> 22.5%
Beijing, CN (PEK)	15,064	<b>-40.0%</b>	Hangzhou, CN (HGH)	1,675,790	<b>↓</b> -5.3%	Dubai, AE (DXB)	190,635	<b>↓</b> -13.4%
Los Angeles CA, US (LAX)	14,691	<b>4</b> -49.1%	Denver CO, US (DEN)	1,657,486	<b>-</b> 45.4%	Miami FL, US (MIA)	188,963	<b>1</b> 9.4%
Kunming, CN (KMG)	14,220	<b>↓</b> -4.0%	Charlotte NC, US (CLT)	1,384,095	<b>↓</b> -37.4%	Tokyo, JP (NRT)	182,426	<b>4.1%</b>
Phoenix AZ, US (AZA)	13,241	<b>↓</b> -23.4%	Tokyo, JP (HND)	1,333,129	<b>↓</b> -63.7%	Frankfurt, DE (FRA)	174,080	<b>1</b> 3.4%
Seattle WA, US (SEA)	13,188	<b>↓</b> -31.2%	Chicago IL, US (ORD)	1,277,707	<b>-66.1%</b>	Guangzhou, CN (CAN)	158,591	<b>-1.6</b> %

Note: Total scheduled and non-scheduled services

In terms of aircraft departures, the Top 15 airports reported a combined fall of -28.1% YoY. For the second consecutive month, positive growth was observed in the Top 15 with two airports in China, Shenzhen and Chengdu, increasing at +2.1% and +3.0%, respectively. Atlanta ranked 1st with -38.1% decline, followed by Chicago and Dallas/Fort Worth.

In terms of passengers, all the Top 15 airports posted a total fall of -36.9% YoY. Although YoY increase observed in the previous month disappeared, several Chinese airports have seen traffic returning closely to pre-crisis levels. Airports in China and US continue to dominate the Top 15 list with Guangzhou retaining the 1st place. Tokyo overtook Antalya and returned to the Top 15.

In terms of **freight**, the Top 15 airports reported a YoY increase of **+6.2%**. This was the fifth consecutive growth since June with majority of the Top 15 posting YoY increase. The strongest expansion was recorded by **Anchorage** (**+26.4%**) and **Chicago** (**+22.5%**). Three airports, **Hong Kong**, **Dubai** and **Guangzhou** were the only ones posting declines.

### **TOP 15 AIRLINE GROUPS (Ranked by RPK)**

### OCT 2020: -60.7% YoY in terms of RPK for the Top 15

In terms of RPK, the Top 15 airline groups accounted for 58.8% of the world's total RPK in October 2020 and declined by -60.7% YoY. This decline was 9.9 percentage points smaller than the fall in world's average RPK, with all airlines in the Top 15 posting contractions.

Same airlines as in the previous month claimed the Top 15 albeit with diverging recovery pace. All in all, airlines with larger domestic markets appeared to be more resilient.

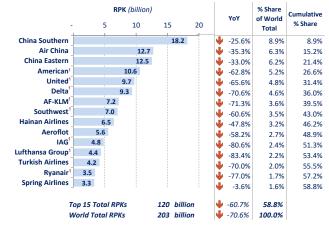
Chinese airlines continued to lead the chart and posted considerably smaller declines. China Southern, Air China, and China Eastern maintained the Top 3 with traffic returning to over 60% of 2019 levels. Two other airlines, Hainan Airlines and Spring Airlines, ranked at 9th and 15th, respectively; and the latter also recorded the fastest recovery among the Top 15 with a moderate decline of -3.6%.

Following the Top 3 Chinese airlines were the three major US airlines, i.e. **American**, **United** and **Delta** whose traffic declined ranging from -60 to -70%. **Southwest** improved two positions to **8th** with a slightly faster recovery among the US airlines.

Marginal improvements were recorded by airlines in Europe, nevertheless, **AF-KLM** climbed up two positions to **7th** outperforming other airlines in the region. In contrast, both **Aeroflot** and **Ryanair** were down two positions respectively to **10th** and **14th**, posting deteriorated declines, particularly for Aeroflot due to the slowdown in domestic traffic recovery.

-59.9% Yo

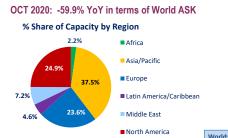
#### **OCT 20**



(Source: ICAO, airlines' websites)

<u>Note</u>: Total scheduled and non-scheduled services

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



(Source: ICAO, IATA, OAG) <u>Note</u>: Total scheduled services



# Worldwide capacity contracted by -59.9% YoY in October 2020.

Capacity were added in all regions with the exception in Europe which has seen further cut in response to the spike in COVID-19 cases and more restricted cross-border travel.

North America and Asia/Pacific showed the fastest recovery in capacity, while Latin America/Caribbean and Africa recorded the biggest improvements compared to the previous month.