

# **ECONOMIC DEVELOPMENT**

# FEB 2022: Air Transport Monthly Monitor

World Results and Analyses for DEC 2021. 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** 

**DEC 2021** 

(versus DEC 2019)

**RPK ▼** -45.1% **ASK ▼** -37.6% **FTK** ▲ 8.9%

**LF**· 72.3% **V**-9.8%

**OUTLOOK\* - JAN 2022** 

(versus JAN 2019)

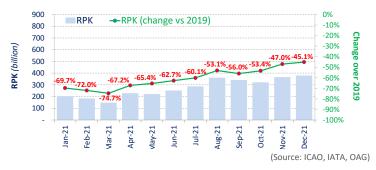
**ASK 7** -38.0%

\* Source OAG

## PASSENGER TRAFFIC

# Revenue Passenger-Kilometres - RPK

World passenger traffic fell by -45.1% in December 2021 (compared to 2019), +1.9 percentage points up from the decline in the previous month. Air travel recovery continued in spite of the Omicron disruptions, owing to the strong demand during the holiday season. The ever-changing restrictions and travel policies remained the biggest challenges and had a measurable impact on travel demand throughout the year. For 2021 as a whole, passenger traffic globally improved modestly, reaching only half of the 2019 level.



## **International Passengers vs. Tourist Arrivals**

International passenger numbers fell by -54.1% in December 2021 (compared to 2019), +1.7 percentage points up from the decline in the previous month. International travel recovery started to pick up gradually from summer, but number of international passengers in 2021 was still far below the 2019 level.

Recovery in international tourist arrivals followed a similar trend, however, it deteriorated towards the year end amid the Omicron outbreak.

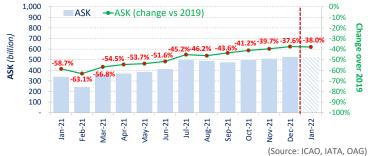


#### **CAPACITY**

#### Available Seat-Kilometres - ASK

Capacity worldwide fell by -37.6% in December 2021 (compared to 2019), +2.1 percentage points up from the decline in the previous month (-39.7%).

Due to reimposed travel bans amid the Omicron outbreak, the January capacity is expected to fall to -38.0% down from the 2019 level.



## Load Factor - LF

The passenger Load Factor reached 72.3% in December 2021, +1.0 percentage point higher than the previous month. Despite the improvement, the December LF was -9.8 percentage points below the 2019 level.

Compared to 2020, LF has improved significantly in 2021, however, the overall LF remained below 70%.



# (Source: IATA)

## FREIGHT TRAFFIC

# Freight Tonne-Kilometres - FTK

World freight traffic reported a growth of +8.9% in December 2021 (compared to 2019), +5.2 percentage points up from the growth in the previous month. After a temporary slowdown in November, air cargo growth rebounded to the trend saw in most of the months of the year. Air cargo has been growing strongly throughout the year, driven by the solid demand of goods as well as the supply chain congestion issues which has caused shifting of volume from surface to air. Overall in 2021, air cargo rose over +6.0%, outperforming the global trade rebound. North America, Africa and the Middle East were the main contributors to the robust growth. However, Latin America/Caribbean remained weak and was the only region with negative growth.



(Source: IATA)



# FEB 2022: Air Transport Monthly Monitor

World Results and Analyses for DEC 2021. Total scheduled services (domestic and international).

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

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

DEC 2021: -12.1%, -20.8%, and +15.3% (vs. 2019) in terms of aircraft departures, passengers and freight for the Top 15

DFC 21

(Source: ACI)

Airports	Departures	vs. 2019	Airports (ranking by number of passengers)	Passengers*	vs.2019	Airports	Freight**	vs. 2019
Chicago IL, US (ORD)	30,744	<b>-20.4%</b>	Atlanta GA, US (ATL)	3,649,312	<b>-19.7%</b>	Hong Kong SAR, CN (HKG)	473,000	<b>9.2%</b>
Atlanta GA, US (ATL)	29,965	<b>-19.2%</b>	Dallas/Fort Worth TX, US (DFW)	2,999,373	-6.2%	Memphis TN, US (MEM)	388,350	<b>11.1%</b>
Dallas/Fort Worth TX, US (DFW)	28,618	-6.9%	Denver CO, US (DEN)	2,683,804	<b>↓</b> -7.3%	Shanghai, CN (PVG)	326,546	-8.4%
Denver CO, US (DEN)	24,879	<b>↓</b> -7.7%	Chicago IL, US (ORD)	2,681,227	<b>-22.1%</b>	Louisville KY, US (SDF)	308,586	<b>f</b> 5.4%
Los Angeles CA, US (LAX)	23,989	<b>↓</b> -18.5%	Los Angeles CA, US (LAX)	2,597,443	<b>-30.5%</b>	Incheon, KR (ICN)	283,534	<b>1</b> 23.1%
Charlotte NC, US (CLT)	22,064	<b>-10.0%</b>	New Delhi, IN (DEL)	2,505,641	<b>-20.6%</b>	Anchorage AK, US (ANC)	280,168	<b>1</b> 22.9%
Miami FL, US (MIA)	21,574	<b>12.2%</b>	Miami FL, US (MIA)	2,285,413	<b>6.6%</b>	Taipei, CN (TPE)	247,263	<b>1</b> 22.0%
New Delhi, IN (DEL)	18,978	-8.9%	Dubai, AE (DXB)	2,246,381	<b>41.8%</b>	Miami FL, US (MIA)	245,397	<b>44.1%</b>
Phoenix AZ, US (PHX)	18,218	-8.2%	Orlando FL, US (MCO)	2,087,303	<b>-10.0%</b>	Tokyo, JP (NRT)	236,200	<b>1</b> 30.1%
Houston TX, US (IAH)	18,053	<b>↓</b> -12.5%	Mexico City, MX (MEX)	2,029,732	-9.9%	Los Angeles CA, US (LAX)	225,647	<b>1</b> 34.5%
Newark NJ, US (EWR)	17,264	-9.0%	Tokyo, JP (HND)	1,961,885	<b>45.3%</b>	Chicago IL, US (ORD)	219,360	<b>62.8%</b>
Las Vegas NV, US (LAS)	16,981	-8.3%	Istanbul, TR (IST)	1,951,556	<b>-29.0%</b>	Doha, QA (DOH)	218,616	<b>12.1%</b>
New York NY, US (JFK)	16,530	<b>↓</b> -12.6%	Las Vegas NV, US (LAS)	1,936,763	-9.1%	Dubai, AE (DXB)	203,461	<b>↓</b> -7.1%
Tokyo, JP (HND)	16,122	<b>-17.8%</b>	Charlotte NC, US (CLT)	1,921,662	<b>-11.4%</b>	Frankfurt, DE (FRA)	188,767	<b>1</b> 8.9%
Amsterdam, NL (AMS)	15,891	<b>-20.1%</b>	New York NY, US (JFK)	1,905,888	<b>-25.3%</b>	Singapore, SG (SIN)	183,800	<b>f</b> 5.2%

Note: Total scheduled and non-scheduled services

In terms of aircraft departures, the Top 15 airports reported a combined fall of -12.1%, compared to 2019. All but three of the Top 15 airports were US airports. Despite recording the largest fall of -20.4%, Chicago retained the 1st position. Tokyo re-appeared in the Top 15 for the first time in the past two years. Miami was the only airport posting increases.

In terms of passengers, the Top 15 airports posted a total fall of -20.8%, compared to 2019. US airports continued to dominant the list, with 10 in the Top 15. Atlanta remained 1st with a decline of -19.7%. In line with departures, Miami was the only airport posting positive growth, at +6.6%. Tokyo and Dubai recorded the largest fall of -45.3% and -41.8%, respectively.

In terms of **freight**, the Top 15 airports reported an increase of **+15.3%**, compared to 2019. Ten of the Top 15 airports grew double-digitally, with **Chicago** recording the strongest growth at a robust **+62.8%**. **Hong Kong** remained **1st** with a solid growth of **+9.2%**. **Shanghai** and **Dubai** continued to post

declines for the fourth consecutive month.

# TOP 15 AIRLINE GROUPS (Ranked by RPK)

# DEC 2021: -35.7% (vs. 2019) in terms of RPK for the Top 15

In terms of RPK, the Top 15 airline groups accounted for 62.0% of the world's total RPK in December 2021 and declined by -35.7% compared to 2019. This decline was 17.7 percentage points smaller than the fall in world's average RPK.

December rankings were relatively stable with changes mainly among the European airlines.

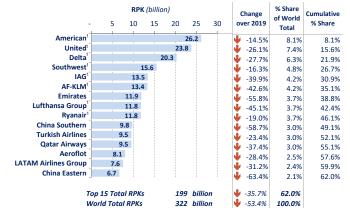
The Top 4 positions were retained by the U.S. airlines, with **American** at **1st**, followed by **United, Delta** and **Southwest**. They also demonstrated the most resilience among the Top 15.

As restrictions remain tight to limit the spread of the Omicrion variant, domestic passenger traffic in China stagnated, and as a result, only **China Southern** and **China Eastern** ranked in the Top 15, at **10th** and **15th**, respectively. Both airlines recorded the largest contractions compared to 2019.

Despite the Omicron outbreak, air travel in Europe continued, however, performance varied among the European airlines. While **IAG** ascended to **5th** and **Lufthansa** stayed at **8th**, the others fell between 1 to 3 positions.

Emirates climbed 2 positions to 7th owing to the steady improvement in international travel, whereas Qatar remained at 12th. With the gradual traffic pick up of Latin America/Caribbean, LATAM maintained the 14th position for the second consecutive month.

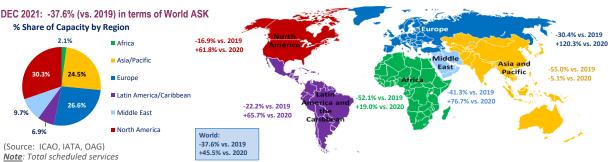
#### **DEC 21**



(Source: ICAO, airlines' websites)

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

# CAPACITY BY REGION (ICAO Statistical Regions)



Worldwide capacity contracted by -37.6% in December 2021, compared to 2019, smaller than the -39.7% fall in November. All regions saw improvements, except for Africa, which was impacted by the travel bans amid the Omicron outbreak.

Overall for 2022, global capacity recovered to around half of the pre-pandemic levels, with North America restoring the most capacity, ahead of other regions.