

<http://www.icao.int/sustainability/Documents/Monthly-Monitor.pdf>

Economic Analysis and Policy Section
E-mail: eap@icao.int

GLOBAL KEY FIGURES

JUN 2013 (versus JUN 2012)

RPK ▲ +6.0% ASK ▲ +5.6% LF ▲ +0.7 pts

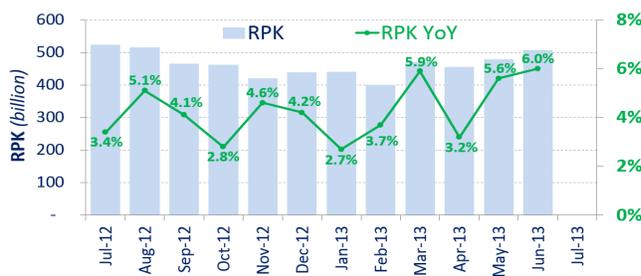
JUL 2013 (versus JUL 2012)

ASK ▲ +5.5%

GLOBAL PASSENGER TRAFFIC

Revenue Passenger-Kilometres

World passenger traffic grew at **+6.0%** in June 2013 compared to June 2012. This growth represents the highest year-on-year increase in the past twelve months. Along with improving economic stability in key advanced economies and global growth in the third quarter of 2013, global air travel is expected to expand at a similar rate as in June during the summer peak period.



(Source: IATA, OAG, airlines websites)

CAPACITY

Available Seat-Kilometres

Capacity increased by **+5.6%** in June 2013, the highest growth posted during the last 13 months. Capacity is expected to increase at **+5.5%** in July 2013, the third consecutive growth above 5%.



(Source: IATA, OAG, airlines websites)

International traffic

International markets grew slightly slower than domestic ones in June 2013, posting **+5.9%** year-on-year.

International tourist arrivals grew at a **comparable level** (+5.0%) in June 2013.



(Source: IATA, UNWTO)

Load Factor

The passenger Load Factor increased by **0.7 point** compared to June 2012, reaching **81.7%** in June 2013, the highest level registered in the last 10 months. June represents the beginning of a 3-months period (the summer peak period) that usually records the highest average Load Factors of the year.



(Source: IATA)

* Tourists by all modes of transport (air tourists account for 52% of the total in 2012)

OUTLOOK - AUG 2013

Based on OAG, a **+5.7% growth rate in ASK is expected for AUG 2013.**

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TOP 15 AIRPORTS

JUN 2013 -0.8% YoY in terms of departures for the Top 15

In terms of departures, the **Top 15 airports recorded a decrease of -0.8% compared to one year ago**. 7 airports out of 15 posted positive year-on-year growth in June 2013. **Dallas recorded the fastest growth (+5.2%)** and has performed the highest growth rates every month of the top 15 since January 2013. The **largest decreases were recorded by Denver and Paris** (-6.6% and -6.0%, respectively).

Departures from CDG airport were affected by the nationwide **air traffic controllers strike** between June 11 and 13. The French Civil Aviation Authority requested airlines to cut their flight schedules from CDG by half during the period. However, passengers embarked remained at the same level as last year.

Compared to June 2012, Los Angeles (+2.0%) and London (+0.8%) **moved one rank up over** Denver (-6.6%) and Paris (-6.0%), respectively. Detroit (-1.3%) lost two ranks compared to last year. **Minneapolis (+0.6%) and Amsterdam (+1.0%) entered the Top 15** while **Phoenix and Philadelphia moved it out**.

| Airports | Departures | YoY | Passengers* | YoY |
|--------------------------------|------------|---------|-------------|---------|
| Atlanta, GA US (ATL) | 39 087 | ↓ -3.1% | 4 220 068 | ↓ -3.7% |
| Chicago, IL US (ORD) | 38 334 | ↓ -0.8% | 3 069 960 | ↓ -1.1% |
| Dallas Fort Worth TX, US (DFW) | 29 033 | ↑ 5.2% | 2 765 827 | ↑ 6.9% |
| Los Angeles, CA, US (LAX) | 26 613 | ↑ 2.0% | 3 057 257 | ↑ 6.5% |
| Denver, CO US (DEN) | 25 243 | ↓ -6.6% | 2 358 155 | ↓ -2.1% |
| Charlotte NC, US (CLT) | 23 558 | ↑ 1.3% | 1 894 627 | ↑ 5.7% |
| Beijing, CN (PEK) | 23 120 | ↑ 1.3% | 3 438 000 | ↑ 1.4% |
| Las Vegas NV, US (LAS) | 22 282 | ↓ -0.9% | 1 845 760 | ↑ 2.5% |
| Houston TX, US (IAH) | 21 764 | ↓ -2.1% | 1 852 232 | ↓ -0.2% |
| Frankfurt, DE (FRA) | 21 066 | ↓ -1.4% | 2 702 596 | ↑ 0.7% |
| London, GB (LHR) | 20 007 | ↑ 0.8% | 3 265 967 | ↑ 4.6% |
| Paris, FR (CDG) | 19 900 | ↓ -6.0% | 2 766 779 | ↓ 0.0% |
| Minneapolis MN, US (MSP) | 18 976 | ↑ 0.6% | 1 561 123 | ↑ 4.1% |
| Amsterdam, NL (AMS) | 18 908 | ↑ 1.0% | 2 428 795 | ↑ 5.2% |
| Detroit MI, US (DTW) | 18 725 | ↓ -1.3% | 1 466 166 | ↓ -1.4% |

(Source: airports websites)

TOP 15 AIRLINES

JUL 2013 +4.0% YoY in terms of RPK for the Top 15

In terms of RPK, **13 airlines** out of 15 posted a **positive growth in July 2013** compared to one year ago. **The highest growth of the Top 15** was recorded by **China Eastern** with a **+15.5%** year-on-year increase, followed by Emirates and the two other Chinese carriers. **Cathay Pacific posted a +4.9%** year-on-year increase, its **highest** traffic growth since January 2013, however somewhat swollen by the effect of severe typhoon Vicente in July 2012.

United and Southwest are the only carriers in the Top 15 to record a **decrease in July 2013**.

Delta airlines moved one rank up over United to become the largest carrier of the Top 15 for the first time since the merger of United and Continental in early 2012.

Every European airline of the Top 15 recorded positive but lower year-on-year growth than in the previous month. **British Airways**, by recording the **same level of RPK as last year**, lost one rank against Air China compared to one year ago in July.

LATAM, the only Latin American carrier in the top 15, grew at a modest rate of **+2.0% compared to the average of +4.0% of the Top 15**.

| | RPK (billion) | | | | | YoY |
|----------------------|---------------|----|------|----|------|---------|
| | 5 | 10 | 15 | 20 | 25 | |
| Delta | | | | | 28.0 | ↑ 2.8% |
| United | | | | | 27.7 | ↓ -1.1% |
| AF-KLM | | | 21.9 | | | ↑ 1.8% |
| American | | | 19.6 | | | ↑ 2.4% |
| Emirates** | | | 18.7 | | | ↑ 13.9% |
| Southwest | | | 16.0 | | | ↓ -0.7% |
| Lufthansa | | | 15.4 | | | ↑ 0.9% |
| China Southern | | | 13.7 | | | ↑ 8.4% |
| Air China | | | 12.9 | | | ↑ 7.9% |
| British Airways | | | 12.0 | | | ↑ 0.0% |
| Ryanair** | | | 11.3 | | | ↑ 5.9% |
| China Eastern | | | 11.3 | | | ↑ 15.5% |
| US Airways | | | 10.3 | | | ↑ 6.8% |
| LATAM (LAN and TAM) | | | 9.7 | | | ↑ 2.0% |
| Cathay Pacific group | | | 9.4 | | | ↑ 4.9% |

(Source: ICAO, airlines websites)

CAPACITY BY REGION (ICAO Statistical Regions)

JUL 2013

All regions showed positive growth in July 2013 compared to one year ago, with a **+5.5% increase in capacity worldwide**. The airlines of the **Middle East recorded the highest growth in July** and in the first half of 2013, despite the on-going Syrian conflict that impact the Region. However, the largest players continue to post double digit capacity increase in July 2013.

Asia/Pacific, the largest region in terms of ASK, recorded the second highest capacity increase with +9.0% year-on-year. Among the largest contributors, China, India, Malaysia and Thailand recorded double digits growth in July 2013.

Latin America/Caribbean and Africa grew at a rate just **above the month world average of +5.5%** while **Europe and North America** showed growth rates **below** the average.

| | Jul-13 | | | YTD | | |
|-------------------------|---------------|-------------|---------------|---------------|-------------|---------------|
| | ASK (billion) | % | YoY | ASK (billion) | % | YoY |
| ASIA/PACIFIC | 197 | 30% | ↑ 9.0% | 1277 | 31% | ↑ 5.7% |
| EUROPE | 192 | 29% | ↑ 3.7% | 1125 | 27% | ↑ 1.7% |
| NORTH AMERICA | 169 | 25% | ↑ 2.4% | 1061 | 26% | ↑ 1.1% |
| MIDDLE EAST | 55 | 8% | ↑ 9.9% | 354 | 9% | ↑ 9.2% |
| LATIN AMERICA/CARIBBEAN | 34 | 5% | ↑ 6.0% | 224 | 5% | ↑ 5.8% |
| AFRICA | 19 | 3% | ↑ 5.6% | 116 | 3% | ↑ 2.8% |
| World | 665 | 100% | ↑ 5.5% | 4157 | 100% | ↑ 3.6% |

(Source: OAG, airlines websites)

* Embarked Passengers **Source: OAG and ICAO estimates