ICAO

ECONOMIC DEVELOPMENT

JUN 2022: Air Transport Monthly Monitor

World Results and Analyses for APR 2022. 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

APR 2022 (versus APR 2019)

RPK ▼ -37.2% **ASK** ▼ -32.9% **CTK** ▼ -1.0% **LF**: 77.8% ▼ -5.0%

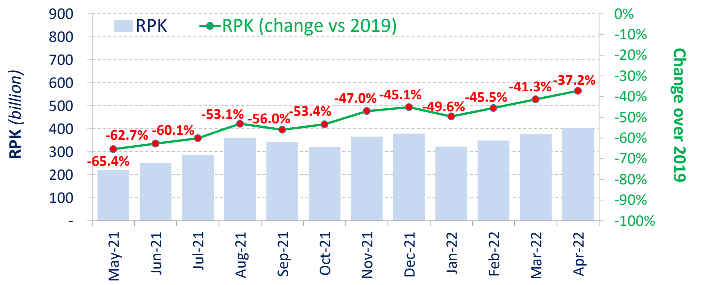
OUTLOOK* - MAY 2022 (versus MAY 2019)

ASK ▼ -27.0% * Source OAG

PASSENGER TRAFFIC

Revenue Passenger-Kilometres - RPK

World passenger traffic in April 2022 was -37.2% below the 2019 level, +4.1 percentage points up from the decline in the previous month. In spite of the pandemic, air travel recovery continued to gather momentum, supported by the ongoing ease of travel restrictions and pent-up travel demand across the globe. Europe demonstrated the fastest recovery owing to the strong rebound in international travel, while Asia/Pacific remained lagging behind other regions due to the stricter travel restrictions and the deterioration in Chinese domestic travel.



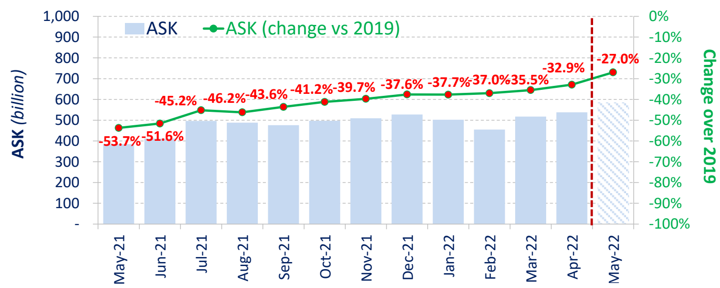
(Source: ICAO, IATA, OAG)

CAPACITY

Available Seat-Kilometres - ASK

Capacity worldwide in April 2022 was -32.9% below the 2019 level, +2.6 percentage points up from the decline in the previous month (**-35.5%**).

Industry capacity continued to ramp up in tandem with the pace of demand increase. The capacity in May is expected to improve to -27.0% down from the 2019 level.

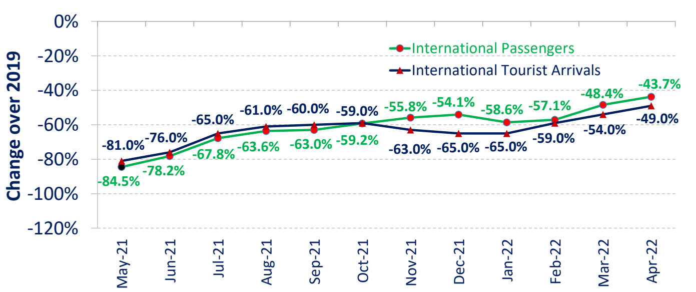


(Source: ICAO, IATA, OAG)

International Passengers vs. Tourist Arrivals

International passenger numbers in April 2022 was -43.7% below the 2019 level, +4.7 percentage points up from the decline in the previous month. International air travel recovery continued to accelerate as a result of the relaxation of border and travel restrictions.

The recovery in international tourist arrivals followed the similar trend as international passenger traffic.



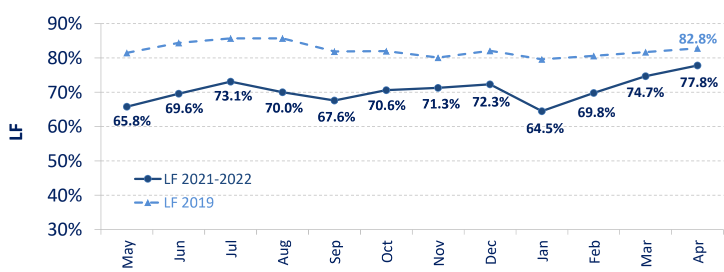
*UNWTO Definition

(Source: ICAO, UNWTO)

Load Factor - LF

The passenger Load Factor reached 77.8% in April 2022, +3.1 percentage points higher than the previous month.

Despite the improvement, the April LF remained -5.0 percentage points below the 2019 level.

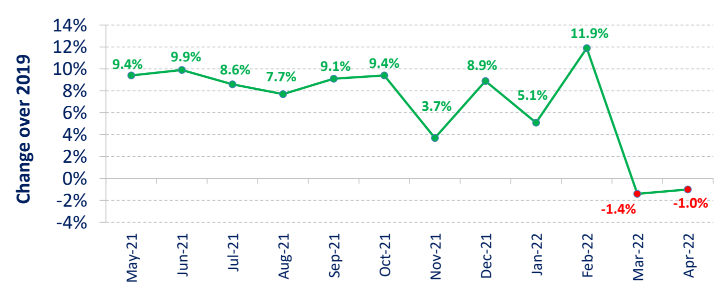


(Source: IATA)

CARGO TRAFFIC

Cargo Tonne-Kilometres - CTK

World freight traffic in April 2022 was -1.0% below the 2019 level, -0.4 percentage point up from the decline in the previous month. Air cargo growth started to face headwinds since March. Besides the impact of the pandemic restrictions, particularly the lockdown in China, the Ukraine-Russia war has caused further supply chain disruptions, which reduced global trade and overall economic activity. Performance by region was a mix. Asia/Pacific struggled the most with the largest contraction, followed by Europe and Latin America/Caribbean. On the other hand, North America continued to show resilience with double-digit growth, followed by Africa and the Middle East, both of which saw positive growth.



(Source: IATA)

ACRONYMS: **ACI**: Airports Council International; **ASK**: Available Seat-Kilometres; **IATA**: International Air Transport Association; **CTK**: Cargo 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.

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

APR 2022: -9.7%, -13.3%, and +13.3% (vs. 2019) in terms of aircraft movements, passengers and freight for the Top 15

APR 22

Airports (ranking by number of departures)	Movements	vs. 2019
Atlanta GA, US (ATL)	59,872	-20.9%
Chicago IL, US (ORD)	59,278	-20.4%
Dallas/Fort Worth TX, US (DFW)	54,615	-2.1%
Denver CO, US (DEN)	47,859	-3.1%
Las Vegas NV, US (LAS)	46,532	22.5%
Los Angeles CA, US (LAX)	46,064	-19.0%
Miami FL, US (MIA)	40,406	16.9%
Phoenix AZ, US (PHX)	35,936	-4.4%
New Delhi, IN (DEL)	35,633	0.4%
Amsterdam, NL (AMS)	35,529	-18.4%
New York NY, US (JFK)	34,850	-4.8%
Newark NJ, US (EWR)	33,929	-8.8%
Paris, FR (CDG)	33,683	-21.1%
London, GB (LHR)	32,852	-18.8%
Houston TX, US (IAH)	32,805	-16.4%

Airports (ranking by number of passengers)	Passengers*	vs.2019
Atlanta GA, US (ATL)	7,821,771	-15.3%
Dallas/Fort Worth TX, US (DFW)	6,071,554	1.4%
Chicago IL, US (ORD)	5,581,608	-18.8%
Denver CO, US (DEN)	5,458,016	2.6%
Los Angeles CA, US (LAX)	5,441,504	-24.8%
London, GB (LHR)	5,081,426	-25.3%
New Delhi, IN (DEL)	4,924,992	-0.9%
Dubai, AE (DXB)	4,851,610	-28.3%
Paris, FR (CDG)	4,599,895	-29.2%
New York NY, US (JFK)	4,490,989	-13.9%
Istanbul, TR (IST)	4,441,191	-0.4%
Amsterdam, NL (AMS)	4,434,587	-27.4%
Miami FL, US (MIA)	4,398,398	16.4%
Orlando FL, US (MCO)	4,308,332	-0.8%
Las Vegas NV, US (LAS)	4,256,812	-0.8%

Airports (ranking by tonnes of freight)	Freight**	vs. 2019
Hong Kong SAR, CN (HKG)	373,000	-3.1%
Memphis TN, US (MEM)	350,836	-2.1%
Anchorage AK, US (ANC)	287,838	30.7%
Incheon, KR (ICN)	257,682	17.4%
Louisville KY, US (SDF)	237,059	14.8%
Miami FL, US (MIA)	228,348	25.4%
Taipei, CN (TPE)	217,084	27.4%
Tokyo, JP (NRT)	204,858	19.1%
Los Angeles CA, US (LAX)	203,010	24.2%
Doha, QA (DOH)	201,333	14.4%
Chicago IL, US (ORD)	172,329	21.1%
Guangzhou, CN (CAN)	166,246	10.5%
Frankfurt, DE (FRA)	162,584	-3.0%
Paris, FR (CDG)	157,620	2.0%
New York NY, US (JFK)	145,145	42.6%

__Note__: Total scheduled and non-scheduled services

(Source: ACI)

In terms of **aircraft movements**, the Top 15 airports reported a combined fall of **-9.7%**, compared to 2019. All but four of the Top 15 airports were US airports. **Atlanta** remained **1st**, albeit with the second largest decline of **-20.9%**. Three airports posted increases, i.e., **Las Vegas**, **Miami**, and **New Delhi**, with the former recording the strongest growth of +**22.5%**.

In terms of **passengers**, the Top 15 airports posted a total fall of **-13.3%,** compared to 2019. US airports continued to dominant the list, with 9 in the Top 15. **Atlanta** remained **1st** with a decline of **-15.3%**. **Paris** recorded the largest fall of **-29.2%**, followed by **Dubai** at **-28.3%**. On the positive side, three airports posted growth over 2019, among which, **Miami** recorded a significant growth of **+16.4%**.

In terms of **freight**, the Top 15 airports reported an increase of **+13.3%**, compared to 2019. Eleven out of the Top 15 airports posted double-digital growth. **New York** stood out and grew robustly by **+42.6**%, followed by **Anchorage** at **+30.7%**. The top two airports, **Hong Kong** and **Memphis**, however, showed declines compared to the pre-pandemic levels.

TOP 15 AIRLINE GROUPS (Ranked by RPK)

APR 2022: -21.0% (vs. 2019) in terms of RPK for the Top 15

In terms of RPK, the Top 15 airline groups accounted for 56.1% of the world's total RPK in April 2022 and declined by -21.0% compared to 2019. This decline was substantially smaller than the fall in world's average RPK.

Most airlines in the Top 15 showed smaller declines compared to March owing to the ease of travel restrictions. Nevertheless, the Chinese domestic traffic experienced a sharp decline amid the lockdown, and as a result, the Chinese airlines did not rank within the Top 15.

The U.S. airlines retained the Top 4 positions, with **American** at **1st**, followed by **United, Delta** and **Southwest**. **Jetblue** and **Alaska** remained in the Top 15 supported by the strong domestic travel rebound.

Despite the Ukraine-Russian war, international air travel of Europe continued to expand attributed to the ease of travel restrictions and strong pent-up demand. **Lufthansa, AF-KLM** and **Ryanair** improved 3, 2 and 3 positions, respectively.

Airlines in the Middle East showed solid performance, however, both **Emirates** and **Qatar** dropped 2 positions to **8th** and **10th**, respectively.

For the first time since the pandemic, **Air Canada** returned to the Top 15 ranking, albeit with a slower recovery compared to the U.S. airlines.

APR 22

Airline group	RPK (billion)	Change over 2019	% Share of World Total	Cumulative % Share
American[1]	28.0	-7.7%	6.9%	6.9%
United[1]	27.6	-11.2%	6.9%	13.8%
Delta[1]	24.3	-22.0%	6.0%	19.8%
Southwest[1]	17.3	-4.1%	4.3%	24.1%
IAG[1]	17.1	-27.2%	4.2%	28.4%
Lufthansa Group[1]	16.3	-36.1%	4.1%	32.4%
Ryanair[1]	15.6	5.2%	3.9%	36.3%
Emirates	14.4	-39.6%	3.6%	39.9%
AF-KLM[1]	14.3	-41.8%	3.5%	43.4%
Qatar Airways	11.5	-22.6%	2.9%	46.3%
Turkish Airlines	11.5	-4.1%	2.9%	49.1%
Jetblue Airways[1]	7.2	-1.8%	1.8%	50.9%
Air Canada[1]	7.2	-39.5%	1.8%	52.7%
Alaska Airlines[1]	6.9	-7.6%	1.7%	54.4%
LATAM Airlines Group	6.7	-30.6%	1.7%	56.1%
Top 15 Total RPKs	*226 billion*	*-21.0%*	***56.1%***	
World Total RPKs	*403 billion*	*-37.2%*	***100.0%***	

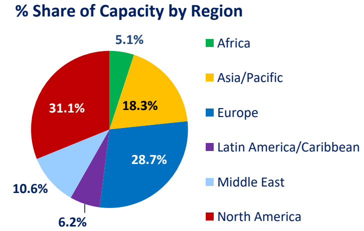
(Source: ICAO, airlines' websites)

__Note__: Total scheduled and non-scheduled services

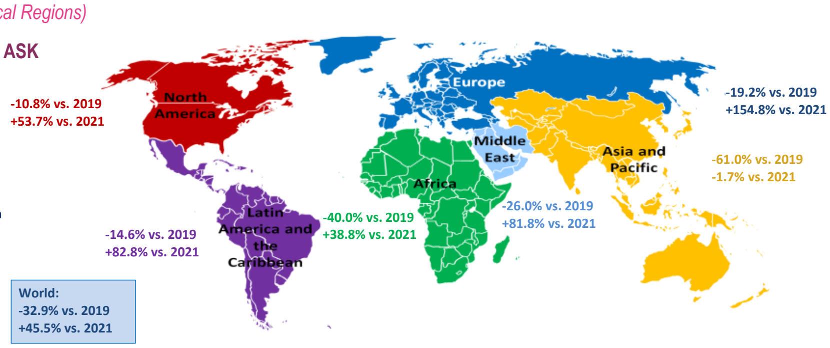
CAPACITY BY REGION *(ICAO Statistical Regions)*

APR 2022: -32.9% (vs. 2019) in terms of World ASK

% Share of Capacity by Region



(Source: ICAO, IATA, OAG)
__Note__: Total scheduled services



Worldwide capacity contracted by -32.9% in April 2022, compared to 2019. Airlines continued to ramp up capacity to meet the growing travel demand as a result of the gradual ease of travel restrictions.

All regions but Asia/Pacific posted smaller declines in capacity compared to the previous month. North America recorded the smallest decline, followed by Europe and Latin America/ Caribbean.

* Total Passengers ** Loaded and Unloaded Freight inTonnes 1. ICAO estimates

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