ICAO

ECONOMIC DEVELOPMENT

AUG 2022: Air Transport Monthly Monitor

World Results and Analyses for JUN 2022. Total scheduled services (domestic and international).

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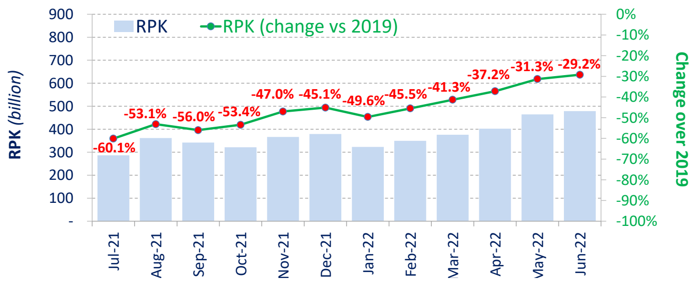
http://www.icao.int/sustainability/Pages/Air-Traffic-Monitor.aspx

GLOBAL KEY FIGURES	JUN 2022 (versus JUN 2019)	OUTLOOK* - JUL 2022 (versus JUL 2019)
	RPK ▼ -29.2% ASK ▼ -27.5% CTK ▲ 0.8% LF: 82.4% ▼ -2.0%	ASK ▼ -21.2% * Source OAG

PASSENGER TRAFFIC

Revenue Passenger-Kilometres - RPK

World passenger traffic in June 2022 was -29.2% below the 2019 level, +2.1 percentage points up from the decline in the previous month. Despite the high fuel prices and inflation, the lifting of COVID-19 curbs and pent-up travel demand continued to drive the recovery of air travel. After trending sideways for several months, domestic travel started to rebound, particularly in Asia/Pacific. The region became the main contributor to the improvement, owing to the surge in domestic traffic in China alongside the gradual ease of lockdowns and travel restrictions.

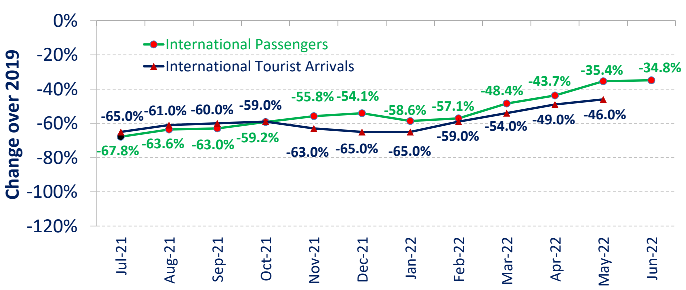


(Source: ICAO, IATA, OAG)

International Passengers vs. Tourist Arrivals

International passenger numbers in June 2022 was -34.8% below the 2019 level, +0.6 percentage points up from the decline in the previous month. All regions saw significant month-on-month improvements in international air travel. The recovery in Asia/Pacific picked up sharply and recorded the strongest increase over the previous month.

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



*UNWTO Definition

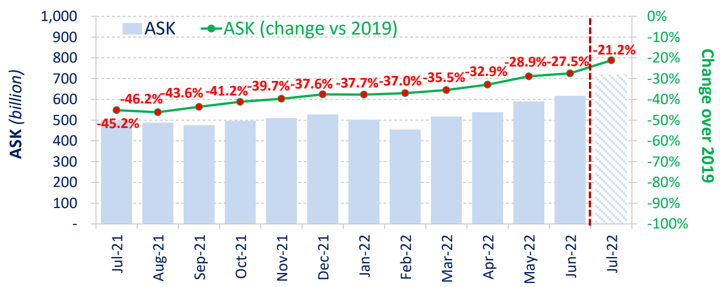
(Source: ICAO, UNWTO)

CAPACITY

Available Seat-Kilometres - ASK

Capacity worldwide in June 2022 was -27.5% below the 2019 level, +1.4 percentage points up from the decline in the previous month (**-28.9%**).

As air travel recovery continues, capacity offered in July is expected to improve to -21.2% down from the 2019 level.

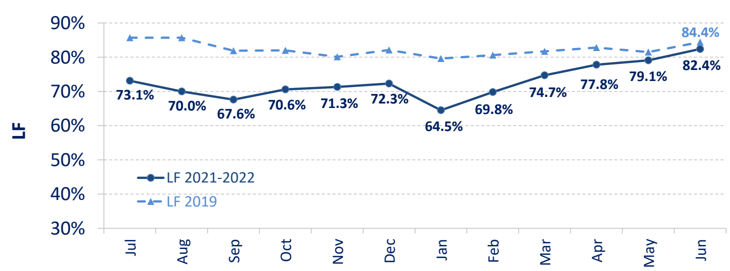


(Source: ICAO, IATA, OAG)

Load Factor - LF

The passenger Load Factor reached 82.4% in June 2022, +3.3 percentage points higher than the previous month.

The continued upward trend in load factor drove the June figure -2.0 percentage points down from the level saw in the same month of 2019.

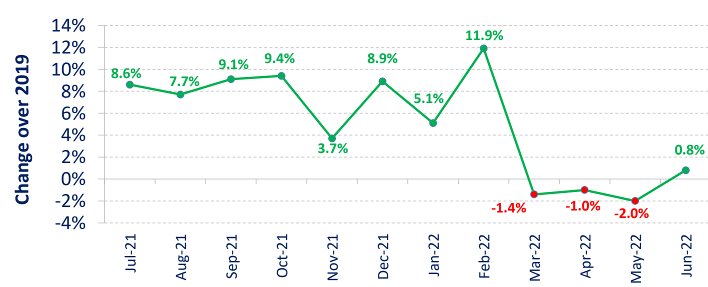


(Source: IATA)

CARGO TRAFFIC

Cargo Tonne-Kilometres - CTK

World cargo traffic in June 2022 was 0.8% above the 2019 level, +2.8 percentage points up from the decline in the previous month. Following three months of declines, air cargo traffic growth returned to a positive rate. Facing various headwinds at present, the growth of air cargo in the near term remains uncertain. Three regions, i.e. North America, Africa and the Middle East, posted gains compared to 2019, with the former two increased double-digitally. Europe was the weakest performing region, in part due to the impact of the war on Within Europe market. Asia/Pacific remained below 2019 level, however, it showed significant improvement month-on-month, owing to the ease of lockdown restrictions in China.



(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)

JUN 2022: -10.0%, -15.1%, and +7.9% (vs. 2019) in terms of aircraft movements, passengers and freight for the Top 15

JUN 22

Airports (ranking by number of departures)	Movements	vs. 2019
Chicago IL, US (ORD)	61,949	-23.1%
Atlanta GA, US (ATL)	60,989	-22.1%
Dallas/Fort Worth TX, US (DFW)	57,967	-5.6%
Denver CO, US (DEN)	53,047	-4.5%
Las Vegas NV, US (LAS)	48,019	21.1%
Los Angeles CA, US (LAX)	47,751	-19.2%
Charlotte NC, US (CLT)	44,065	-8.5%
Amsterdam, NL (AMS)	39,579	-12.5%
Istanbul, TR (IST)	38,852	2.2%
New York NY, US (JFK)	38,634	-2.2%
Paris, FR (CDG)	37,358	-15.5%
New Delhi, IN (DEL)	36,381	-2.5%
Frankfurt, DE (FRA)	35,883	-21.8%
Miami FL, US (MIA)	35,750	7.6%
Seattle WA, US (SEA)	35,251	-12.3%

Airports (ranking by number of passengers)	Passengers*	vs.2019
Atlanta GA, US (ATL)	8,239,522	-17.1%
Dallas/Fort Worth TX, US (DFW)	6,867,677	0.4%
Chicago IL, US (ORD)	6,489,509	-17.9%
Denver CO, US (DEN)	6,254,557	-2.1%
Los Angeles CA, US (LAX)	6,118,003	-23.9%
Istanbul, TR (IST)	5,996,071	0.8%
London, GB (LHR)	5,991,128	-17.3%
Paris, FR (CDG)	5,450,028	-21.2%
Amsterdam, NL (AMS)	5,232,957	-19.5%
New Delhi, IN (DEL)	5,126,045	-6.8%
Frankfurt, DE (FRA)	4,992,606	-24.1%
New York NY, US (JFK)	4,822,260	-15.6%
Las Vegas NV, US (LAS)	4,690,207	5.0%
Dubai, AE (DXB)	4,665,711	-34.1%
Madrid, ES (MAD)	4,536,555	-18.5%

Airports (ranking by tonnes of freight)	Freight**	vs. 2019
Hong Kong SAR, CN (HKG)	361,000	-4.7%
Memphis TN, US (MEM)	343,151	-1.3%
Anchorage AK, US (ANC)	307,658	29.2%
Shanghai, CN (PVG)	263,237	-10.0%
Incheon, KR (ICN)	243,165	10.4%
Louisville KY, US (SDF)	241,612	9.3%
Taipei, CN (TPE)	214,939	24.0%
Los Angeles CA, US (LAX)	206,770	24.4%
Tokyo, JP (NRT)	200,664	15.3%
Doha, QA (DOH)	194,984	12.5%
Chicago IL, US (ORD)	188,234	24.1%
Miami FL, US (MIA)	187,673	11.1%
Paris, FR (CDG)	169,000	6.1%
Singapore, SG (SIN)	163,300	0.9%
Frankfurt, DE (FRA)	160,649	-2.7%

__Note__: Total scheduled and non-scheduled services

(Source: ACI)

In terms of **aircraft movements**, the Top 15 airports reported a combined fall of **-10.0%** compared to 2019. Ten out of the Top 15 airports were US airports. **Chicago** remained **1st,** albeit recording the largest decline of **-23.1%**. Three airports posted increases, i.e., **Las Vegas**, **Istanbul**, and **Miami**. The former recorded a robust growth of **+21.1%**.

In terms of **passengers**, the Top 15 airports posted a total fall of **-15.1%**, compared to 2019. The Top 15 list was dominated by airports in the US and Europe. **Atlanta** remained **1st** with a decline of **-17.1%**. **Dubai** recorded the largest fall of **-34.1%**, followed by **Frankfurt** (-24.1%) and **Los Angeles** (**-23.9%**). Three airports posted increases, i.e., **Dallas/Fort Worth**, **Istanbul**, and **Las Vegas**.

In terms of **freight**, the Top 15 airports reported an increase of **+7.9%**, compared to 2019. Over half of the Top 15 airports posted double-digital growth. **Anchorage** recorded the strongest growth at **+29.2%**, followed by **Los Angeles** at **+24.4%**. Four airports posted declines, with **Shanghai** recording the largest fall of **-10.0%**, followed by **Hong Kong** at **-4.7%**.

TOP 15 AIRLINE GROUPS (Ranked by RPK)

JUN 2022: -19.8% (vs. 2019) in terms of RPK for the Top 15

In terms of RPK, the Top 15 airline groups accounted for 55.9% of the world's total RPK in June 2022 and declined by -19.8% compared to 2019. This decline was 9.4 percentage points smaller than the fall in world's average RPK.

The Top 15 airlines continued to show fluctuation due to the diverse pace in recovery among regions.

The US airlines retained the Top 3 positions, with **American** at **1st**, followed by **United** and **Delta**. Rankings of **Southwest** and **Jetblue** dropped slightly, overtaken by airlines in Europe and Asia/Pacific.

Airlines in Europe continued to show improvements supported by the surge in international travel. **Lufthansa**, **IAG**, **Ryanair** and **AF-KLM** occupied the positions from **4th** to **7th**. **Turkish Airlines** maintained the **10th** place.

Performance of airlines in the Middle East were relatively stable. **Emirates** dropped 1 position to **9th**, while **Qatar** retained **11th**.

After disappearing from the Top 15 list for two months, **China Southern** re-appeared in the list and ranked **12th**, however, the airline recorded the largest decline among the Top 15 group at **-57.2%**. **Singapore Airlines** kept the **14th** position with a decline of **-31.1%**.

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Airline group	RPK (billion)	Change over 2019	% Share of World Total	Cumulative % Share
American[1]	32.4	-8.7%	6.8%	6.8%
United[1]	31.6	-14.0%	6.6%	13.4%
Delta[1]	28.0	-23.7%	5.8%	19.2%
Lufthansa Group	20.7	-24.7%	4.3%	23.5%
IAG[1]	19.8	-25.5%	4.1%	27.7%
Ryanair[1]	18.6	12.0%	3.9%	31.5%
AF-KLM[1]	18.1	-30.7%	3.8%	35.3%
Southwest[1]	17.6	-9.1%	3.7%	39.0%
Emirates	16.4	-34.3%	3.4%	42.4%
Turkish Airlines	15.7	21.6%	3.3%	45.7%
Qatar Airways	13.6	-3.7%	2.8%	48.5%
China Southern	9.7	-57.2%	2.0%	50.6%
Air Canada[1]	9.4	-33.2%	2.0%	52.5%
Singapore Airlines Group	8.7	-31.1%	1.8%	54.4%
Jetblue Airways[1]	7.5	1.2%	1.6%	55.9%
Top 15 Total RPKs	*268 billion*	*-19.8%*	***55.9%***	
World Total RPKs	*479 billion*	*-29.2%*	***100.0%***	

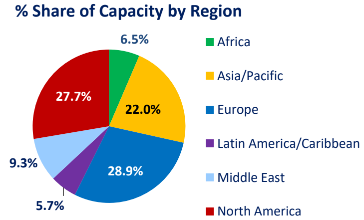
(Source: ICAO, airlines' websites)

__Note__: Total scheduled and non-scheduled services

CAPACITY BY REGION *(ICAO Statistical Regions)*

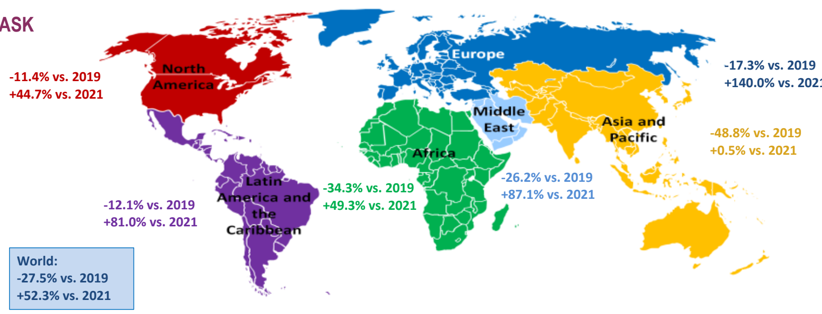
JUN 2022: -27.5% (vs. 2019) in terms of World ASK

% Share of Capacity by Region



(Source: ICAO, IATA, OAG)

__Note__: Total scheduled services



Worldwide capacity contracted by -27.5% in June 2022, compared to 2019. Capacity offered by airlines posted slight improvements over the previous month, with only Asia/Pacific and Latin America/Caribbean recording smaller declines.

The other regions posted modest month-on-month decline, excepted for Middle East, which saw a decline by over 10 percentage points.

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

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