ECONOMIC DEVELOPMENT

SEP 2022: Air Transport Monthly Monitor

World Results and Analyses for JUL 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

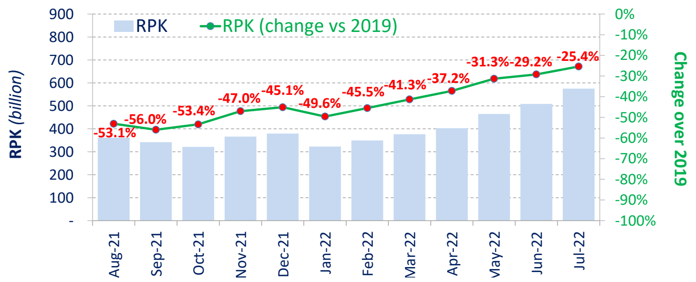
JUL 2022
(versus JUL 2019)
RPK ▼ -25.4% **ASK** ▼ -23.6% **CTK** ▼ -3.0% **LF**: 83.5% ▼ -2.2%

OUTLOOK* - AUG 2022
(versus AUG 2019)
ASK ▼ -21.2% * Source OAG

PASSENGER TRAFFIC

Revenue Passenger-Kilometres - RPK

World passenger traffic in July 2022 was -25.4% below the 2019 level, +3.8 percentage points up from the decline in the previous month. Relaxation of travel restrictions compounded by the strong travel demand led to the acceleration in traffic recovery. The main contributor to the improvement was Asia/Pacific, driven by the increase in Chinese domestic traffic. Nevertheless, recovery of the region still lags behind other regions. Overall, North America and Latin America/Caribbean were leading the recovery chart, approaching the pre-pandemic levels.

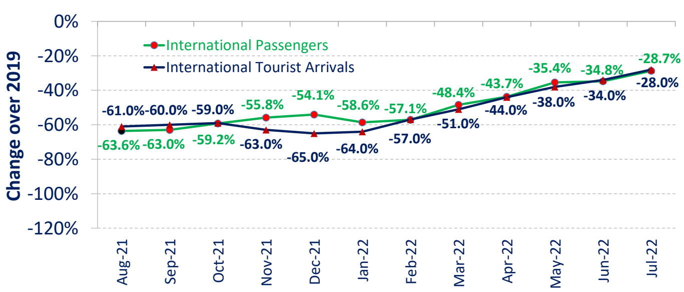


(Source: ICAO, IATA, OAG)

International Passengers vs. Tourist Arrivals

International passenger numbers in July 2022 was -28.7% below the 2019 level, +6.1 percentage points up from the decline in the previous month. All regions saw acceleration in international air travel recovery, particularly in Asia/Pacific, which recorded the strongest month-on-month increase.

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



*UNWTO Definition

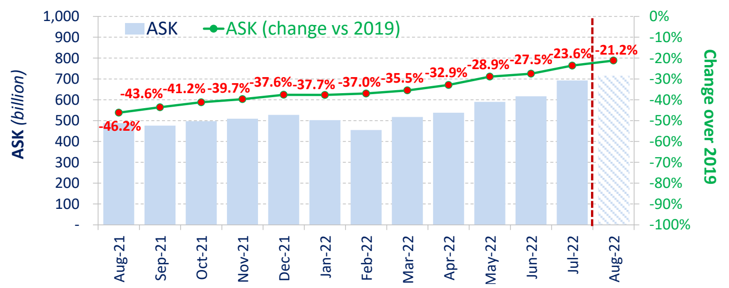
(Source: ICAO, UNWTO)

CAPACITY

Available Seat-Kilometres - ASK

Capacity worldwide in July 2022 was -23.6% below the 2019 level, +3.9 percentage points up from the decline in the previous month (**-27.5%**).

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

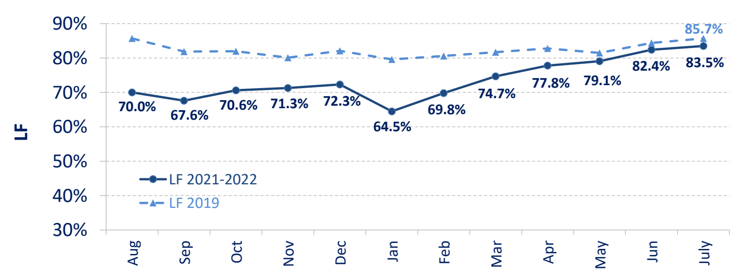


(Source: ICAO, IATA, OAG)

Load Factor - LF

The passenger Load Factor reached 83.5% in July 2022, +1.1 percentage points higher than the previous month.

With the continued improvement, load factor in July has recovered to only -2.2 percentage points below the level saw in the same month of 2019.

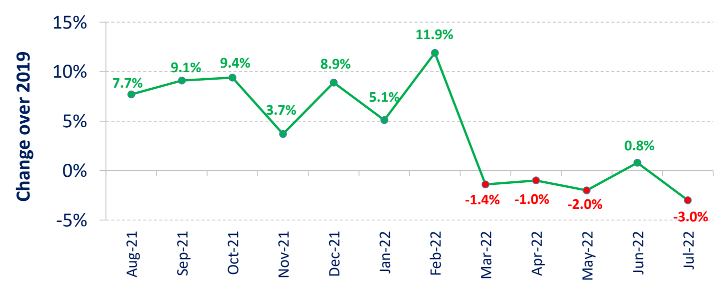


(Source: IATA)

CARGO TRAFFIC

Cargo Tonne-Kilometres - CTK

World cargo traffic in July 2022 was -3.0% below the 2019 level, -3.8 percentage points down from the decline in the previous month. After a short-lived positive growth, air cargo traffic posted a decline compared to the 2019 level. Headwinds such as the high inflation and rising interest rates have caused the weakening in air cargo demand. However, the ease of COVID-19 restrictions and supply chain disruption will likely support the global trade and air cargo demand in the months ahead. Performance has been a mix among regions. While North America continued to be significantly above the 2019 level, Europe remained the weakest performing region showing the largest contraction.



(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.

ICAO

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

JUL 2022: -9.7%, -15.3%, and +5.4% (vs. 2019) in terms of aircraft movements, passengers and freight for the Top 15

JUL 22

Airports (ranking by number of departures)	Movements	vs. 2019
Chicago IL, US (ORD)	63,498	-22.5%
Atlanta GA, US (ATL)	62,981	-21.8%
Dallas/Fort Worth TX, US (DFW)	59,085	-9.1%
Denver CO, US (DEN)	54,781	-7.0%
Las Vegas NV, US (LAS)	50,639	25.4%
Los Angeles CA, US (LAX)	49,970	-19.4%
Charlotte NC, US (CLT)	43,921	-10.5%
Istanbul, TR (IST)	41,932	5.3%
New York NY, US (JFK)	40,890	-0.7%
Paris, FR (CDG)	39,337	-16.2%
Amsterdam, NL (AMS)	38,544	-17.0%
Seattle WA, US (SEA)	38,052	-11.0%
Miami FL, US (MIA)	37,500	9.3%
New Delhi, IN (DEL)	35,638	-7.9%
Boston MA, US (BOS)	35,435	-8.3%

Airports (ranking by number of passengers)	Passengers*	vs.2019
Atlanta GA, US (ATL)	8,470,230	-17.1%
Dallas/Fort Worth TX, US (DFW)	6,992,526	-2.2%
Istanbul, TR (IST)	6,740,544	5.4%
Chicago IL, US (ORD)	6,623,567	-18.8%
Denver CO, US (DEN)	6,451,344	-4.2%
Los Angeles CA, US (LAX)	6,337,451	-25.2%
London, GB (LHR)	6,312,252	-18.6%
Dubai, AE (DXB)	6,245,155	-22.0%
Paris, FR (CDG)	6,017,614	-19.0%
New York NY, US (JFK)	5,398,311	-10.3%
Amsterdam, NL (AMS)	5,179,725	-23.0%
Frankfurt, DE (FRA)	5,022,720	-27.4%
Madrid, ES (MAD)	5,022,501	-15.5%
Antalya, TR (AYT)	5,005,510	-8.0%
New Delhi, IN (DEL)	4,908,062	-15.5%

Airports (ranking by tonnes of freight)	Freight**	vs. 2019
Hong Kong SAR, CN (HKG)	346,000	-11.7%
Memphis TN, US (MEM)	325,590	-6.2%
Anchorage AK, US (ANC)	293,676	11.7%
Shanghai, CN (PVG)	271,868	-10.2%
Incheon, KR (ICN)	230,313	3.4%
Louisville KY, US (SDF)	226,599	-2.8%
Taipei, CN (TPE)	211,299	17.4%
Tokyo, JP (NRT)	201,534	13.9%
Paris, FR (CDG)	197,826	19.2%
Los Angeles CA, US (LAX)	196,079	19.8%
Doha, QA (DOH)	195,746	6.4%
Miami FL, US (MIA)	187,512	15.4%
Singapore, SG (SIN)	163,300	-4.1%
Chicago IL, US (ORD)	160,759	15.1%
Cincinnati OH, US (CVG)	157,549	73.0%

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. Eleven out of the Top 15 airports were US airports. **Chicago** remained **1st**, with a decline of **-22.5%**. For the second consecutive month, three airports posted increases, i.e., **Las Vegas**, **Istanbul**, and **Miami**, with the former recording a robust growth of **+25.4%**.

In terms of **passengers**, the Top 15 airports posted a total fall of **-15.3%**, 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%**. **Frankfurt** recorded the largest contraction of **-27.4%**, followed by **Los Angeles** (**-25.2%**). **Istanbul** was the only airport within the Top 15 recording a positive growth, at **5.4%**.

In terms of **freight**, the Top 15 airports reported an increase of **+5.4%**, compared to 2019. Over half of the Top 15 airports posted double-digital growth. **Cincinnati** recorded the most significant growth at **+73.0%**, followed by **Los Angeles** at **+19.8%**. Five airports posted declines, with **Hong Kong** recording the largest fall of **-11.7%**.

TOP 15 AIRLINE GROUPS (Ranked by RPK)

JUL 2022: -18.7% (vs. 2019) in terms of RPK for the Top 15

In terms of RPK, the Top 15 airline groups accounted for 50.5% of the world's total RPK in July 2022 and declined by -18.7% compared to 2019. This decline was 6.7 percentage points smaller than the fall in world's average RPK.

The US airlines retained the Top 3 positions, with **American** at **1st** and recovering faster than **United** and **Delta**, which ranked **2nd** and **3rd**. **Southwest** maintained the **8th** place and recovered to close to its 2019 traffic level.

Recovery pace of airlines in Europe accelerated, supported by the surge in international travel. **Lufthansa** and **IAG** kept the same positions while **AF-KLM** dropped 2 places. **Ryanair** and **Turkish Airlines** were the only two airlines recording positive growth over the pre-pandemic levels.

Two Middle Eastern airlines continued to recover steadily. **Emirates** improved 3 positions to **6th**, and **Qatar** remained at **11th**.

China Southern retained the **12th** position, however, the airline recorded the largest decline among the Top 15 group at **-45.6%**. **Singapore Airlines** maintained the **14th** position with a decline of **-28.6%**.

LATAM re-appeared in the Top 15 list owing to fast recovery in both domestic and international traffic.

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Airline group	RPK (billion)	Change over 2019	% Share of World Total	Cumulative % Share
American[1]	33.9	-5.2%	5.9%	5.9%
United[1]	33.6	-10.6%	5.8%	11.7%
Delta[1]	29.6	-22.5%	5.2%	16.9%
Lufthansa Group[1]	20.5	-30.1%	3.6%	20.4%
IAG[1]	19.7	-29.7%	3.4%	23.9%
Emirates	19.7	-30.8%	3.4%	27.3%
Ryanair[1]	19.7	13.5%	3.4%	30.7%
Southwest[1]	19.5	-1.4%	3.4%	34.1%
AF-KLM[1]	19.0	-32.1%	3.3%	37.4%
Turkish Airlines	17.7	22.8%	3.1%	40.5%
Qatar Airways	15.1	-8.9%	2.6%	43.1%
China Southern	14.1	-45.6%	2.5%	45.6%
Air Canada[1]	10.5	-24.6%	1.8%	47.4%
Singapore Airlines Group	9.3	-28.6%	1.6%	49.0%
LATAM Airlines Group	8.7	-22.2%	1.5%	50.5%
Top 15 Total RPKs	*291 billion*	*-18.7%*	***50.5%***	
World Total RPKs	*575 billion*	*-25.4%*	***100.0%***	

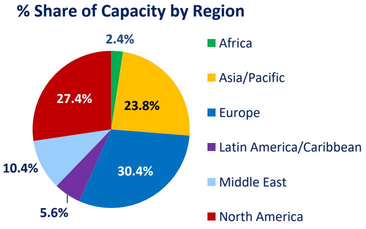
(Source: ICAO, airlines' websites)

Note: Total scheduled and non-scheduled services

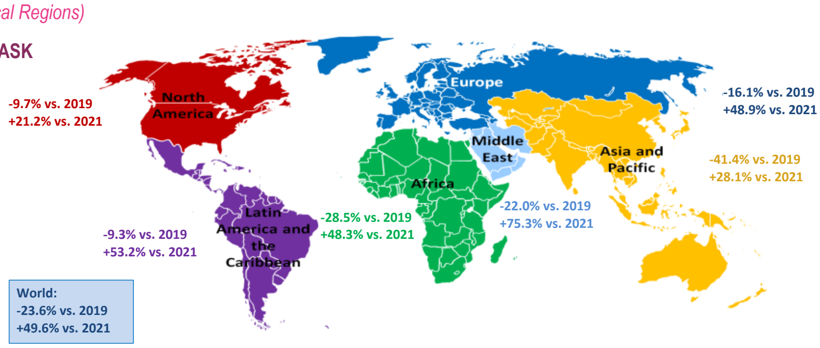
CAPACITY BY REGION *(ICAO Statistical Regions)*

JUL 2022: -23.6% (vs. 2019) in terms of World ASK

% Share of Capacity by Region



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



Worldwide capacity contracted by -23.6% in July 2022, compared to 2019. All regions posted improvements from the previous month, with the largest increase in Asia/Pacific, in line with the traffic recovery in the region.

Both North America and Latin America/Caribbean have recovered to less than 10% below their 2019 capacity levels.

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

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