ICAO

ECONOMIC DEVELOPMENT

OCT 2021: Air Transport Monthly Monitor

World Results and Analyses for AUG 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

AUG 2021
(versus AUG 2019)

RPK ▼ -56.0% **ASK** ▼ -46.2% **FTK** ▲ 7.7% **LF**: 70.0% ▼ -15.7%

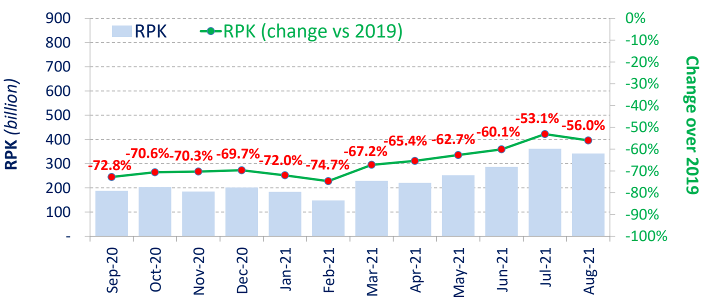
OUTLOOK* - SEP 2021
(versus SEP 2019)

ASK ▼ -43.2% * Source OAG

PASSENGER TRAFFIC

Revenue Passenger-Kilometres - RPK

World passenger traffic fell by -56.0% in August 2021 (compared to 2019), -2.9 percentage points down from the decline in the previous month. This deterioration was mainly attributed to the weakening in domestic markets, particular the Chinese domestic travel which plunged dramatically due to the new outbreaks and the more stringent travel restrictions. Some other major domestic markets also worsened. International travel, however, continued to improve in most of the regions, except for Asia/Pacific, where restrictions remain stricter than others.



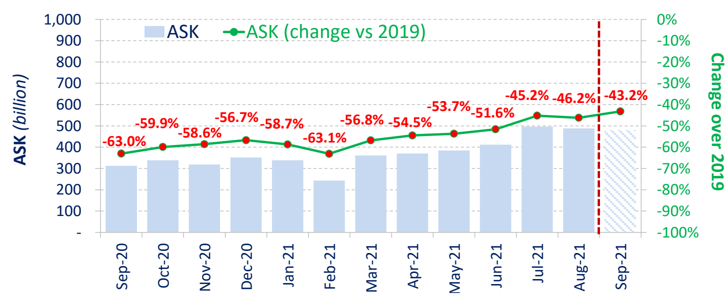
(Source: ICAO, IATA, OAG)

CAPACITY

Available Seat-Kilometres - ASK

Capacity worldwide fell by -46.2% in August 2021 (compared to 2019), -1.0 percentage point down from the decline in the previous month (**-45.2%**).

With signs of travel rebound towards the end of August, capacity is expected to increase moderately in September 2021 to **-43.2%** down from the 2019 levels.

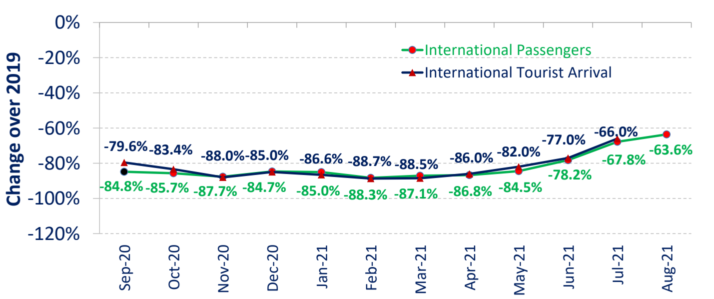


(Source: ICAO, IATA, OAG)

International Passengers vs. Tourist Arrivals

International passenger numbers fell by -63.6% in August 2021 (compared to 2019), +4.2 percentage points up from the decline in the previous month. Easing travel restrictions and progress in vaccination has supported the continued improvements in international travel. Significant rebound was recorded by intra-European travel.

The international tourist arrivals also picked up and followed a similar trend as international passenger traffic.



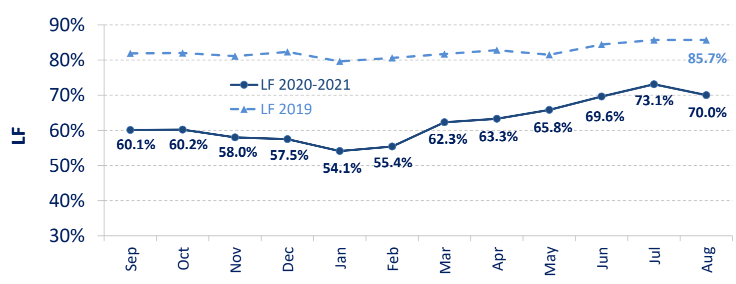
*UNWTO Definition

(Source: ICAO, UNWTO)

Load Factor - LF

The passenger Load Factor reached 70.0% in August 2021, -3.1 percentage points lower than the previous month. The worsened domestic travel also resulted in a lower domestic load factor.

As the recovery of capacity was faster than travel demand recovery, the August LF remained significantly below 2019 levels at -15.7 percentage points lower.

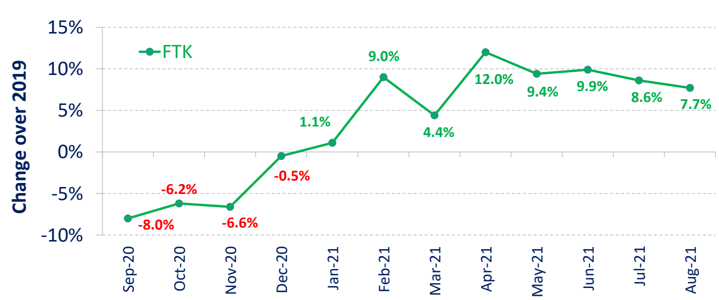


(Source: IATA)

FREIGHT TRAFFIC

Freight Tonne-Kilometres - FTK

World freight traffic reported a growth of +7.7% in August 2021 (compared to 2019), -0.9 percentage point lower than the growth in the previous month. The softening in air cargo growth reflected the slower expansion in export and manufacturing production. Nevertheless, the global demand for goods is expected to be supportive for air cargo growth in the coming months. Africa continued to outperform other regions, surpassing the 2019 levels at over +30%, albeit with the smallest share of world cargo traffic. North America and Middle East also rose double-digitally, while growth for Europe and Asia/Pacific airlines remained moderate. Latin America/Caribbean, the region with the second smallest share of world air cargo traffic, continued to be the only region posting contraction from 2019 levels.



(Source: IATA)

ACRONYMS: **ACI**: Airports Council International; **ASK**: Available Seat-Kilometres; **IATA**: International Air Transport Association; **FTK**: Freight 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)

AUG 2021: -11.9%, -28.0%, and +12.4% (vs. 2019) in terms of aircraft departures, passengers and freight for the Top 15

AUG 21

Airports (ranking by number of departures)	Departures	vs. 2019	Airports (ranking by number of passengers)	Passengers*	vs.2019	Airports (ranking by tonnes of freight)	Freight**	vs. 2019
Chicago IL, US (ORD)	34,518	↓ -16.8%	Atlanta GA, US (ATL)	3,780,962	↓ -23.5%	Hong Kong SAR, CN (HKG)	426,000	↑ 12.6%
Atlanta GA, US (ATL)	33,664	↓ -16.9%	Denver CO, US (DEN)	2,971,337	↓ -7.9%	Memphis TN, US (MEM)	366,964	↑ 0.8%
Dallas/Fort Worth TX, US (DFW)	29,346	↓ -11.1%	Chicago IL, US (ORD)	2,946,368	↓ -26.2%	Anchorage AK, US (ANC)	321,543	↑ 41.8%
Denver CO, US (DEN)	27,614	↓ -5.3%	Dallas/Fort Worth TX, US (DFW)	2,885,071	↓ -16.0%	Shanghai, CN (PVG)	293,363	↑ 0.4%
Los Angeles CA, US (LAX)	24,855	↓ -19.6%	Los Angeles CA, US (LAX)	2,567,605	↓ -36.9%	Incheon, KR (ICN)	268,438	↑ 22.2%
Charlotte NC, US (CLT)	23,172	↓ -6.2%	Istanbul, TR (IST)	2,272,413	↓ -32.6%	Taipei, CN (TPE)	239,737	↑ 31.1%
Houston TX, US (IAH)	19,429	↓ -4.7%	Antalya, TR (AYT)	2,154,734	↓ -23.3%	Louisville KY, US (SDF)	227,469	↓ -2.6%
Seattle WA, US (SEA)	18,550	↓ -14.2%	Seattle WA, US (SEA)	2,059,163	↓ -22.0%	Los Angeles CA, US (LAX)	214,618	↑ 26.9%
Phoenix AZ, US (PHX)	18,166	↑ 2.9%	Moscow, RU (SVO)	2,006,595	↓ -23.9%	Doha, QA (DOH)	206,265	↑ 18.5%
Las Vegas NV, US (LAS)	17,531	↓ -14.1%	Charlotte NC, US (CLT)	1,967,621	↓ -8.7%	Miami FL, US (MIA)	200,803	↑ 22.4%
Anchorage AK, US (ANC)	17,191	↑ 2.3%	Las Vegas NV, US (LAS)	1,905,106	↓ -14.2%	Dubai, AE (DXB)	189,981	↓ -6.4%
Amsterdam, NL (AMS)	16,776	↓ -28.1%	Amsterdam, NL (AMS)	1,893,608	↓ -44.4%	Chicago IL, US (ORD)	184,549	↑ 26.3%
Miami FL, US (MIA)	16,097	↓ -5.1%	Paris, FR (CDG)	1,775,519	↓ -52.5%	Frankfurt, DE (FRA)	174,728	↑ 7.1%
Istanbul, TR (IST)	15,749	↓ -22.5%	Miami FL, US (MIA)	1,690,513	↓ -11.7%	Singapore, SG (SIN)	165,500	↓ -2.1%
Salt Lake City UT, US (SLC)	15,730	↑ 1.5%	Frankfurt, DE (FRA)	1,684,194	↓ -51.3%	Guangzhou, CN (CAN)	161,189	↑ 4.7%

__Note__: Total scheduled and non-scheduled services

(Source: ACI)

In terms of **aircraft departures**, the Top 15 airports reported a combined fall of **-11.9**%, compared to 2019. The Top 15 list remained dominated by US airports. Three airports, **Phoenix**, **Anchorage** and **Salt Lake city**, posted increases compared to 2019, albeit at a modest rate. **Chicago** remained **1st** with a decline of **-16.8%**. Amsterdam and Istanbul also ranked within the Top 15.

In terms of **passengers**, the Top 15 airports posted a total fall of **-28.0%,** compared to 2019. Unlike the previous months, the list is dominated by US and European airports. For the first time, both **Istanbul** and **Antalya** in Turkey ranked within Top 15. **Amsterdam**, **Paris** and **Frankfurt**, also re-appeared in Top 15 after over a year. **Atlanta** remained at **1st** with a decline of **-23.5%**.

In terms of **freight**, the Top 15 airports reported an increase of **+12.4%**, compared to 2019. **Hong Kong** retained the **1st** position with a solid growth of **+12.6%**. Several airports grew double-digitally, with **Anchorage** and **Taipei** recording the strongest increase by **+41.8%** and **+31.1%**, respectively. **Dubai** continued to post the largest contraction at **-6.4%**.

TOP 15 AIRLINE GROUPS (Ranked by RPK)

AUG 2021: -47.0% (vs. 2019) in terms of RPK for the Top 15

In terms of RPK, the Top 15 airline groups accounted for 53.4% of the world's total RPK in August 2021 and declined by -47.0% compared to 2019. This decline was 6.1 percentage points smaller than the fall in world's average RPK.

Two major factors affected significantly the August rankings. On one side, the Chinese domestic travel fell drastically impacted by the renewed outbreaks; on the other side, the international travel in Europe picked up rapidly.

US airlines retained the Top 4 positions wit **American** ranked **1st** followed by **Delta**, **United** and **Southwest**. **Jetblue Airways** also ranked in the Top 15 supported by the solid domestic demand. Among all Top 15 airlines, **Southwest** posted the smallest decline compared to 2019 levels.

Chinese domestic travel demand worsened again with far worse deterioration than the previous ones, and all Chinese airlines experienced drastic fall in traffic. As a result, only **China Southern** and **Air China** ranked within Top15, at merely **12th** and **15th**.

Supported by the pick up of intra-European travel, airlines in Europe moved up their rankings after the US airlines from 5th to 10th. **Lufthansa** and **AF-KLM** improved 4 and 2 positions to **5th** and **6th**, respectively.

Qatar Airways and **Emirates** ranked **11th** and **14th**, with the latter recording the largest contraction from 2019 levels.

AUG 21

Airline	RPK *(billion)*	Change over 2019	% Share of World Total	Cumulative % Share
American[1]	26.9	↓ -25.6%	7.4%	7.4%
Delta[1]	22.8	↓ -39.8%	6.3%	13.7%
United[1]	22.3	↓ -38.0%	6.2%	19.9%
Southwest[1]	17.3	↓ -3.0%	4.8%	24.7%
Lufthansa Group[1]	13.0	↓ -55.7%	3.6%	28.3%
AF-KLM[1]	12.9	↓ -54.1%	3.6%	31.8%
Aeroflot	12.3	↓ -24.6%	3.4%	35.2%
Turkish Airlines	10.8	↓ -28.8%	3.0%	38.2%
Ryanair[1]	10.3	↓ -42.5%	2.8%	41.1%
IAG	9.9	↓ -65.0%	2.7%	43.8%
Qatar Airways	8.4	↓ -50.3%	2.3%	46.1%
China Southern	7.4	↓ -72.7%	2.0%	48.2%
Jetblue Airways[1]	7.2	↓ -8.6%	2.0%	50.2%
Emirates	6.6	↓ -76.8%	1.8%	52.0%
Air China	5.1	↓ -76.3%	1.4%	53.4%
Top 15 Total RPKs	*193 billion*	↓ *-47.0%*	***53.4%***	
World Total RPKs	*362 billion*	↓ *-53.1%*	***100.0%***	

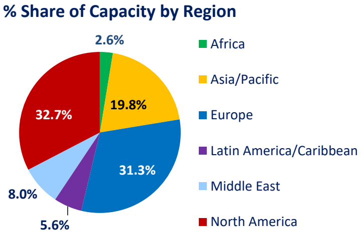
(Source: ICAO, airlines' websites)

__Note__: Total scheduled and non-scheduled services

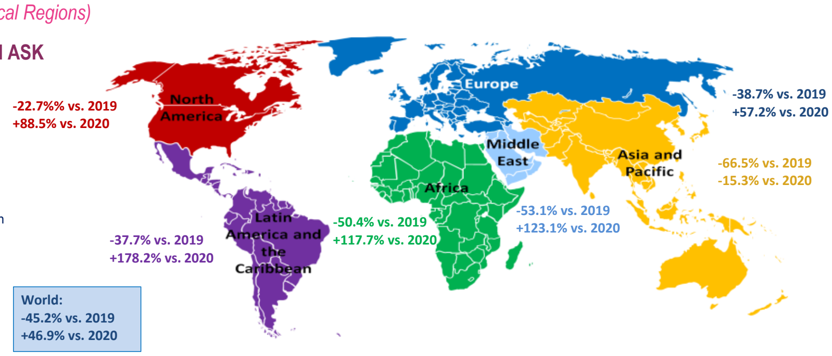
CAPACITY BY REGION *(ICAO Statistical Regions)*

AUG 2021: -46.2% (vs. 2019) in terms of World ASK

% Share of Capacity by Region



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



Worldwide capacity contracted by -46.2% in August 2021, compared to 2019. This indicated a slight deterioration from July, due to the capacity cut in Asia/Pacific, mainly in Chinese domestic market.

All other regions posted smaller fall in capacity, with the strongest improvements in Europe the Middle East, mostly owing to the expansion in international capacity.

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

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