ECONOMIC DEVELOPMENT

DEC 2021: Air Transport Monthly Monitor

World Results and Analyses for OCT 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

OCT 2021 *(versus OCT 2019)*

RPK ▼ -49.4% **ASK** ▼ -41.2% **FTK** ▲ 9.4% **LF**: 70.6% ▼ -11.4%

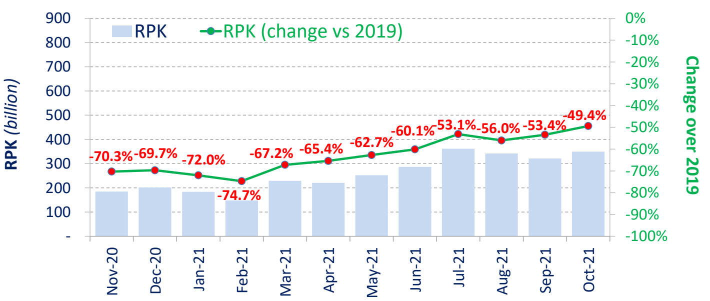
OUTLOOK* - NOV 2021 *(versus NOV 2019)*

ASK ▼ -41.0% * Source OAG

PASSENGER TRAFFIC

Revenue Passenger-Kilometres - RPK

World passenger traffic fell by -49.4% in October 2021 (compared to 2019), +4.0 percentage points up from the decline in the previous month. Recovery in air travel progressed slightly, supported by the rising vaccination rates and stabilization in new infections. Nonetheless, risk of outbreak resurgence remains and poses significant uncertainty to a steady recovery in the coming months. Domestic market of the Russian Federation demonstrated the most resilience, which has exceeded the pre-crisis levels since the beginning of the year.

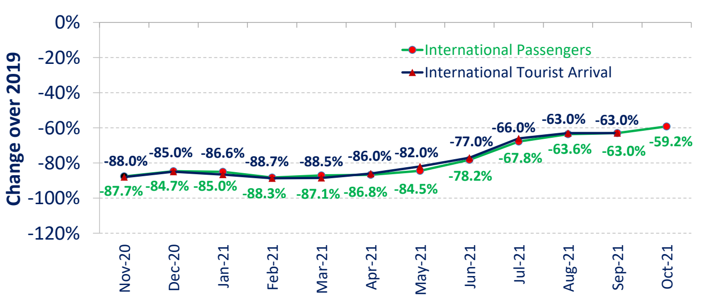


(Source: ICAO, IATA, OAG)

International Passengers vs. Tourist Arrivals

International passenger numbers fell by -59.2% in October 2021 (compared to 2019), +3.8 percentage points up from the decline in the previous month. Owing to the easing travel restrictions, international travel recovered in all regions, particularly in Europe and the Middle East.

The recovery in international tourist arrivals is expected to follow a similar trend as international passenger traffic.



*UNWTO Definition

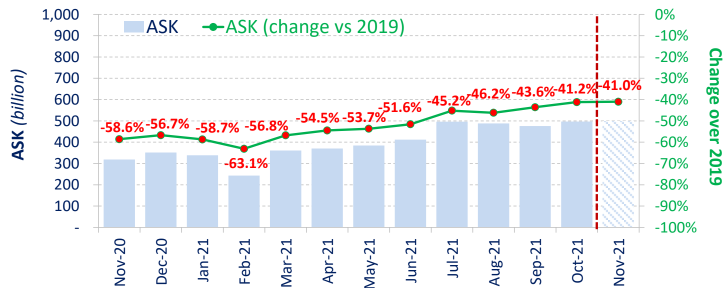
(Source: ICAO, UNWTO)

CAPACITY

Available Seat-Kilometres - ASK

Capacity worldwide fell by -41.2% in October 2021 (compared to 2019), +2.4 percentage points up from the decline in the previous month (**-43.6%**).

As airlines have been cautious in adding back capacity, the November capacity is expected to stay at -41.0% down from the 2019 levels.

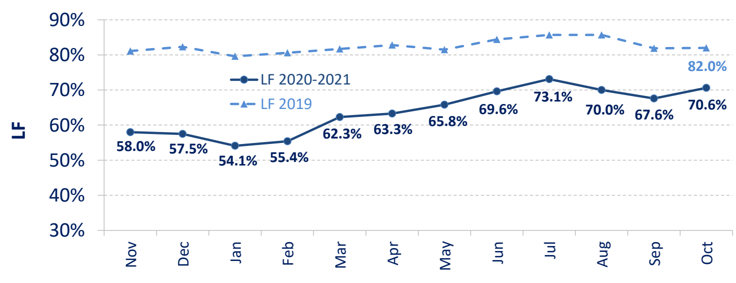


(Source: ICAO, IATA, OAG)

Load Factor - LF

The passenger Load Factor reached 70.6% in October 2021, +3.0 percentage points higher than the previous month. Load factor of the month improved as the air travel demand increased more than the capacity.

Despite the improvement, the October LF remained -11.4 percentage points below the 2019 levels.

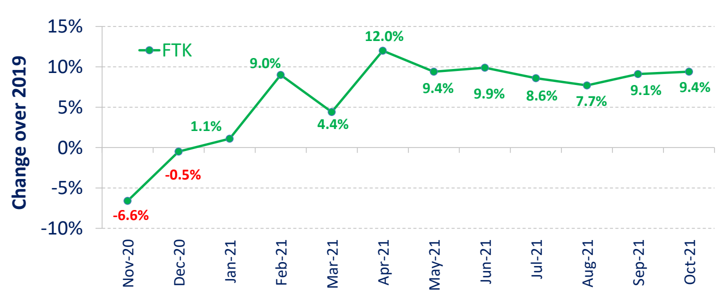


(Source: IATA)

FREIGHT TRAFFIC

Freight Tonne-Kilometres - FTK

World freight traffic reported a growth of +9.4% in October 2021 (compared to 2019), +0.3 percentage points up from the growth in the previous month. Air cargo continued to benefit from the the supply chain congestion which has caused temporary shift of freight from sea to air. To meet the strong demand of the upcoming major year-end consumer events, businesses and shippers are likely to favor air cargo over other modes of air transport. Performance diverged across regions. While Asia/Pacific and Europe were the main contributors to the improvement of this month, traffic in Africa and the Middle East deteriorated. Latin America/Caribbean improved significantly, however, it remained the only region posting contraction from the 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.

ICAO

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

OCT 2021: -12.9%, -19.1%, and +13.2% (vs. 2019) in terms of aircraft departures, passengers and freight for the Top 15

OCT 21

Airports (ranking by number of departures)	Departures	vs. 2019
Chicago IL, US (ORD)	34,150	↓ -17.4%
Atlanta GA, US (ATL)	33,672	↓ -12.0%
Dallas/Fort Worth TX, US (DFW)	28,550	↓ -8.2%
Denver CO, US (DEN)	26,246	↓ -5.9%
Los Angeles CA, US (LAX)	24,220	↓ -16.1%
Charlotte NC, US (CLT)	23,378	↓ -7.7%
Houston TX, US (IAH)	19,021	↓ -7.0%
Phoenix AZ, US (PHX)	18,451	↓ -1.6%
Las Vegas NV, US (LAS)	18,200	↓ -14.6%
Guangzhou, CN (CAN)	17,405	↓ -17.1%
Shanghai, CN (PVG)	17,096	↓ -20.7%
Seattle WA, US (SEA)	16,930	↓ -11.7%
Amsterdam, NL (AMS)	16,736	↓ -27.5%
Miami FL, US (MIA)	16,661	↑ 2.5%
New Delhi, IN (DEL)	16,276	↓ -23.0%

Airports (ranking by number of passengers)	Passengers*	vs.2019
Atlanta GA, US (ATL)	3,818,470	↓ -19.7%
Dallas/Fort Worth TX, US (DFW)	2,975,084	↓ -6.7%
Chicago IL, US (ORD)	2,906,783	↓ -22.9%
Denver CO, US (DEN)	2,849,679	↓ -6.2%
Los Angeles CA, US (LAX)	2,423,807	↓ -32.6%
Istanbul, TR (IST)	2,180,393	↓ -29.6%
Las Vegas NV, US (LAS)	2,090,573	↓ -9.5%
Charlotte NC, US (CLT)	2,087,898	↓ -5.6%
New Delhi, IN (DEL)	2,032,665	↓ -32.4%
Guangzhou, CN (CAN)	1,978,035	↓ -37.7%
Antalya, TR (AYT)	1,932,105	↓ -7.4%
Phoenix AZ, US (PHX)	1,906,065	↓ -2.6%
Shenzhen, CN (SZX)	1,903,577	↓ -17.4%
Chengdu, CN (CTU)	1,864,987	↓ -23.3%
Orlando FL, US (MCO)	1,841,354	↓ -11.0%

Airports (ranking by tonnes of freight)	Freight**	vs. 2019
Hong Kong SAR, CN (HKG)	459,000	↑ 9.5%
Memphis TN, US (MEM)	382,041	↑ 1.3%
Shanghai, CN (PVG)	305,458	↓ -5.0%
Anchorage AK, US (ANC)	304,494	↑ 27.3%
Incheon, KR (ICN)	284,858	↑ 18.8%
Taipei, CN (TPE)	242,019	↑ 24.1%
Louisville KY, US (SDF)	238,239	↑ 0.1%
Tokyo, JP (NRT)	231,410	↑ 32.0%
Doha, QA (DOH)	226,422	↑ 15.0%
Los Angeles CA, US (LAX)	225,718	↑ 30.3%
Miami FL, US (MIA)	222,924	↑ 29.0%
Chicago IL, US (ORD)	212,402	↑ 34.5%
Dubai, AE (DXB)	206,963	↓ -6.0%
Frankfurt, DE (FRA)	192,240	↑ 14.1%
Paris, FR (CDG)	187,000	↑ 11.3%

__Note__: Total scheduled and non-scheduled services

(Source: ACI)

In terms of **aircraft departures**, the Top 15 airports reported a combined fall of **-12.9**%, compared to 2019. All but four of the Top 15 airports were US airports. **Chicago** remained **1st** with a decline of **-17.4%.** The largest fall was recorded by **Amsterdam** (**-27.5%**), followed by **New Delhi** (**-23.0%**) and **Shanghai** (**-20.7%**). **Miami** was the only airport posting a positive growth.

In terms of **passengers**, the Top 15 airports posted a total fall of **-19.1%,** compared to 2019. The Top 15 list was dominated by US airports and a few airports in Asia/Pacific and Europe. **Guangzhou** and **Los Angeles** recorded the largest fall of **-37.7%** and **-32.6%**, while **Phoenix** and **Charlotte** recorded the smallest fall of **-2.6%** and **-5.6%**, respectively.

In terms of **freight**, the Top 15 airports reported an increase of **+13.2%**, compared to 2019. Over half of the Top 15 airports grew double-digitally, with the strongest increase in **Chicago** (**+34.5%**) and **Tokyo** (**+32.0%**). **Hong Kong** retained the **1st** position with a solid growth of **+9.5%**. **Shanghai** and **Dubai** continued to post modest declines.

TOP 15 AIRLINE GROUPS (Ranked by RPK)

OCT 2021: -40.7% (vs. 2019) in terms of RPK for the Top 15

In terms of RPK, the Top 15 airline groups accounted for 60.7% of the world's total RPK in October 2021 and declined by -40.7% compared to 2019. This decline was 12.7 percentage points smaller than the fall in world's average RPK.

Compared to September, the Top 15 ranking was relatively stable with a small shift in positions, mostly among the European airlines.

US airlines retained the Top 4 positions with **American** ranked 1st, followed by **Delta**, **United** and **Southwest**. As it has been the case in the previous months, **American** and **Southwest** posted much smaller declines from 2019 levels.

The domestic passenger traffic in China picked up but at a slow pace, as travel restrictions remained strict. The three major Chinese airlines, **China Southern**, **Air China** and **China Eastern** maintained the same positions of **5th**, **12th** and **13th**.

International travel continued to be supportive to European airlines on the back of easing travel restrictions. **Lufthansa** kept the **6th** place, while **AF-KLM** and **IAG** improved 1 position to **7th** and **8th**, respectively.

Qatar Airways and **Emirates** maintained the last two positions within the Top 15, with the latter recording the largest contraction from 2019 levels.

OCT 21

Airline group	RPK (billion)	Change over 2019	% Share of World Total	Cumulative % Share
American[1]	23.7	↓ -16.8%	7.4%	7.4%
Delta[1]	21.3	↓ -33.0%	6.6%	14.0%
United[1]	20.1	↓ -28.8%	6.3%	20.3%
Southwest[1]	15.9	↓ -10.9%	4.9%	25.2%
China Southern	13.1	↓ -46.2%	4.1%	29.3%
Lufthansa Group[1]	13.1	↓ -50.6%	4.1%	33.4%
AF-KLM	11.7	↓ -53.7%	3.6%	37.0%
IAG[1]	11.0	↓ -55.9%	3.4%	40.4%
Aeroflot[1]	10.2	↓ -22.9%	3.2%	43.6%
Ryanair[1]	10.1	↓ -40.8%	3.1%	46.7%
Turkish Airlines	9.8	↓ -29.6%	3.0%	49.8%
Air China	9.7	↓ -50.6%	3.0%	52.8%
China Eastern	9.7	↓ -48.1%	3.0%	55.8%
Emirates	8.2	↓ -66.9%	2.6%	58.4%
Qatar Airways	7.5	↓ -46.7%	2.3%	60.7%
Top 15 Total RPKs	*195 billion*	↓ *-40.7%*	***60.7%***	
World Total RPKs	*322 billion*	↓ *-53.4%*	***100.0%***	

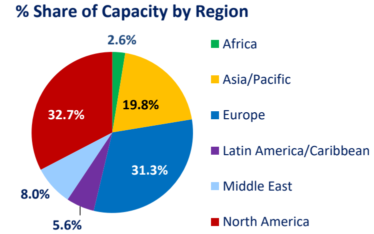
(Source: ICAO, airlines' websites)

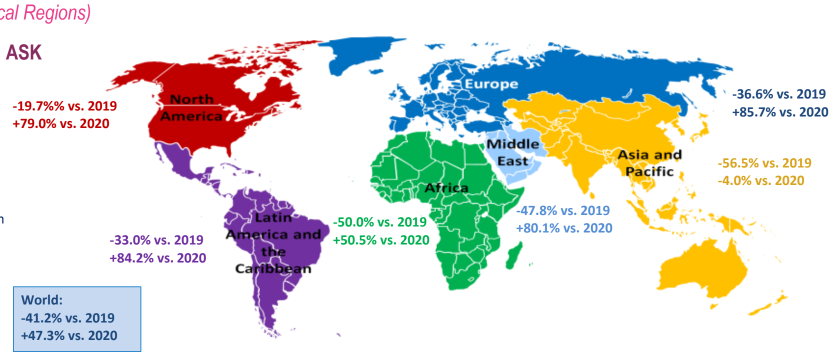
__Note__: Total scheduled and non-scheduled services

CAPACITY BY REGION *(ICAO Statistical Regions)*

OCT 2021: -41.2% (vs. 2019) in terms of World ASK

% Share of Capacity by Region





(Source: ICAO, IATA, OAG)

__Note__: Total scheduled services

Worldwide capacity contracted by -41.2% in October 2021, compared to 2019, a slight improvement from the contraction in October. All regions recorded smaller contraction compared to the previous month, especially Europe and the Middle East.

The largest contraction was recorded by Asia/Pacific, where capacity was even lower than the level in the same month of 2020.

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

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