ICAO

ECONOMIC DEVELOPMENT

SEP 2021: Air Transport Monthly Monitor

World Results and Analyses for JUL 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

JUL 2021
(versus JUL 2019)

RPK ▼ -53.1% **ASK** ▼ -45.2% **FTK** ▲ 8.6% **LF**: 69.6% ▼-12.6%

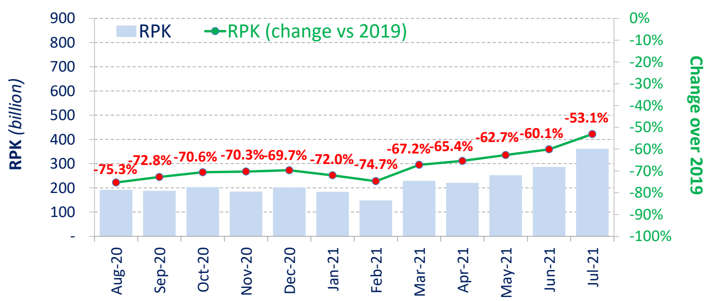
OUTLOOK* - AUG 2021
(versus AUG 2019)

ASK ▼ -45.3% * Source OAG

PASSENGER TRAFFIC

Revenue Passenger-Kilometres - RPK

World passenger traffic fell by -53.1% in July 2021 (compared to 2019), +7.0 percentage points up from the decline in the previous month. The rebound of air travel was attributed to a combination of factors such as the traditional peak northern hemisphere summer travel, pent-up holiday travel demand and progress in vaccine rollout globally. Nevertheless, the rapid spread of new variant poses risks to reversing the recovery trend. Domestic traffic continued to lead the recovery chart, with key domestic markets returning to above or close to pre-pandemic levels.



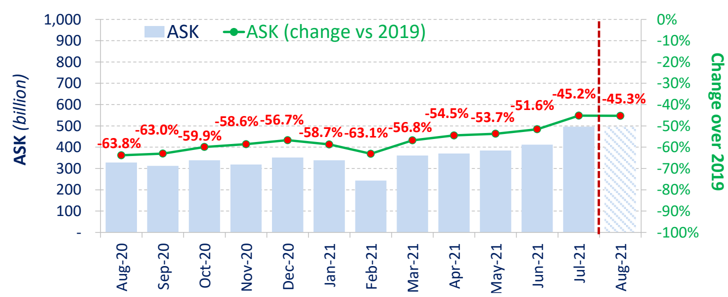
(Source: ICAO, IATA, OAG)

CAPACITY

Available Seat-Kilometres - ASK

Capacity worldwide fell by -45.2% in July 2021 (compared to 2019), +6.4 percentage points up from the decline in the previous month (**-51.6%**).

Amidst the growing spread of the new virus variant, capacity is expected to maintain a similar level in August 2021 at **-45.3%** down from the 2019 levels.

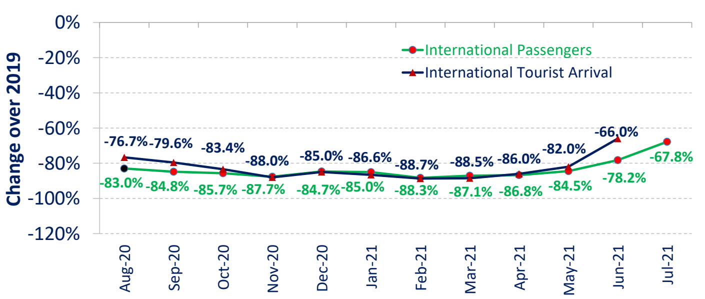


(Source: ICAO, IATA, OAG)

International Passengers vs. Tourist Arrivals

International passenger numbers fell by -67.8% in July 2021 (compared to 2019), +10.4 percentage points up from the decline in the previous month. International traffic rebounded across almost all key regions, particularly in Europe owing to the reopening of intra Europe travel.

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

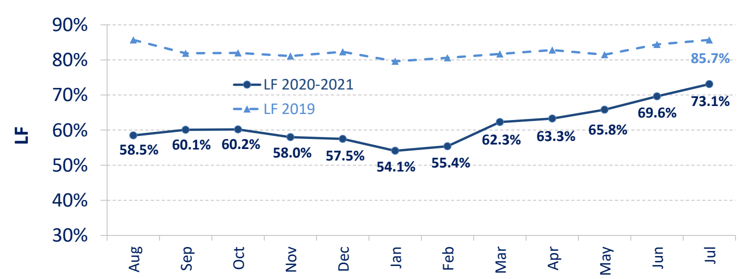


*UNWTO Definition (Source: ICAO, UNWTO)

Load Factor - LF

The passenger Load Factor reached 73.1% in July 2021, +3.5 percentage points higher than the previous month. Domestic load factor returned to the level of over 80%, outperforming the international load factor.

As the recovery of capacity was faster than travel demand recovery, the July LF remained significantly below 2019 levels at -12.6 percentage points lower.

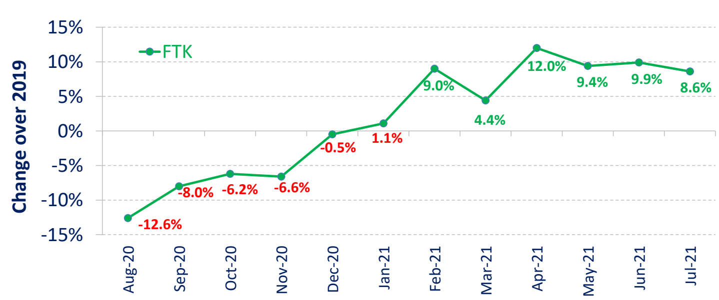


(Source: IATA)

FREIGHT TRAFFIC

Freight Tonne-Kilometres - FTK

World freight traffic reported a growth of +8.6% in July 2021 (compared to 2019), -1.3 percentage points lower than the growth in the previous month. Despite a slight slowdown, the growth trend of air cargo remained strong broadly. The current state of supply chains and demand for businesses to restock inventories remains highly supportive to air cargo. Regional performance continued to vary from each other. North America and the Middle East posted the strongest growth double-digitally; Growth in Europe was solid although relatively moderate. For Asia/Pacific, the growth momentum started to show a sign of softening, while Latin America/Caribbean continued to be the only region posting negative growth.



(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

SEP 2021: Air Transport Monthly Monitor

World Results and Analyses for JUL 2021. Total scheduled services (domestic and international).

Air Transport Bureau
E-mail: ecd@icao.int

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

JUL 2021: -10.0%, -20.3%, and +15.2% (vs. 2019) in terms of aircraft departures, passengers and freight for the Top 15

JUL 21

Airports (ranking by number of departures)	Departures	vs. 2019
Chicago IL, US (ORD)	35,552	-13.3%
Atlanta GA, US (ATL)	32,166	-20.2%
Dallas/Fort Worth TX, US (DFW)	31,045	-4.5%
Denver CO, US (DEN)	28,498	-3.2%
Los Angeles CA, US (LAX)	24,844	-19.9%
Charlotte NC, US (CLT)	23,840	-2.9%
Houston TX, US (IAH)	19,272	-6.7%
Phoenix AZ, US (PHX)	18,571	5.0%
Seattle WA, US (SEA)	18,426	-13.8%
Anchorage AK, US (ANC)	17,466	3.0%
Las Vegas NV, US (LAS)	17,398	-13.8%
Miami FL, US (MIA)	17,165	0.1%
Shanghai, CN (PVG)	16,894	-24.5%
Santa Ana CA, US (SNA)	15,999	16.3%
Guangzhou, CN (CAN)	15,827	-24.3%

Airports (ranking by number of passengers)	Passengers*	vs.2019
Atlanta GA, US (ATL)	4,034,486	-21.0%
Dallas/Fort Worth TX, US (DFW)	3,433,398	-4.0%
Denver CO, US (DEN)	3,184,075	-5.4%
Chicago IL, US (ORD)	2,982,601	-26.9%
Los Angeles CA, US (LAX)	2,780,870	-34.3%
Charlotte NC, US (CLT)	2,194,465	-0.8%
Seattle WA, US (SEA)	2,140,882	-18.9%
Istanbul, TR (IST)	2,087,941	-34.7%
Las Vegas NV, US (LAS)	2,077,266	-8.2%
Orlando FL, US (MCO)	2,074,375	-7.6%
Xi'an, CN (XIY)	1,948,458	-9.3%
Chengdu, CN (CTU)	1,940,692	-20.0%
Miami FL, US (MIA)	1,905,336	-5.3%
Houston TX, US (IAH)	1,891,973	-3.4%
Beijing, CN (PEK)	1,862,059	-57.6%

Airports (ranking by tonnes of freight)	Freight**	vs. 2019
Hong Kong SAR, CN (HKG)	416,000	6.1%
Memphis TN, US (MEM)	373,989	7.8%
Shanghai, CN (PVG)	353,029	16.6%
Anchorage AK, US (ANC)	321,109	22.2%
Incheon, KR (ICN)	280,660	25.9%
Taipei, CN (TPE)	243,982	35.6%
Louisville KY, US (SDF)	237,890	2.0%
Tokyo, JP (NRT)	222,290	25.6%
Los Angeles CA, US (LAX)	217,827	33.1%
Doha, QA (DOH)	213,431	16.0%
Chicago IL, US (ORD)	202,499	45.0%
Miami FL, US (MIA)	200,325	23.3%
Dubai, AE (DXB)	194,059	-10.8%
Frankfurt, DE (FRA)	188,703	11.8%
Singapore, SG (SIN)	163,600	-3.9%

***Note**: Total scheduled and non-scheduled services*

(Source: ACI)

In terms of **aircraft departures**, the Top 15 airports reported a combined fall of **-10.0**%, compared to 2019. The Top 15 list consists mostly of US airports with two Chinese airports (Shanghai and Guangzhou). **Chicago** remained **1st** with a decline of **-13.3%**. A few airports posted increases compared to 2019, with **Santa Ana** posting a double-digit growth of **+16.3%**.

In terms of **passengers**, the Top 15 airports posted a total fall of **-20.3%,** compared to 2019. Similar to departures, the list is dominated by US and Chinese airports. **Istanbul**, for the first time of the year also ranked within Top 15. **Atlanta** remained at **1st** with a decline of **-21.0%**, followed by **Dallas/Fort Worth** (**-4.0%**). The largest contraction was recorded by **Beijing** at **-57.6%**.

In terms of **freight**, the Top 15 airports reported an increase of **+15.2%**, compared to 2019. **Dubai** and **Singapore** were the only airports posting decline, at **-10.8%** and **-3.9%**, respectively. With an increase of **+6.1%**, **Hong Kong** retained the **1st** position. For the sixth consecutive month, **Chicago** recorded the strongest increase at **+45.0%**.

TOP 15 AIRLINE GROUPS (Ranked by RPK)

JUL 2021: -40.1% (vs. 2019) in terms of RPK for the Top 15

In terms of RPK, the Top 15 airline groups accounted for 73.5% of the world's total RPK in July 2021 and declined by -40.1% compared to 2019. This decline was 20.0 percentage points smaller than the fall in world's average RPK. Airlines with large domestic markets continued to lead the growth chart.

US airlines retained the Top 4 positions, and continued to improve, owing to the traditional northern hemisphere summer peak travel and also the busy July 4 long holiday weekend. **American** maintained **1st** with a decline of **-19.5%** compared to 2019. **Delta**, **United** and **Southwest** kept at **2nd**, **3rd** and **4th**, respectively.

After the substantial deterioration in June, Chinese domestic travel demand regained the growth momentum as travel restrictions were eased gradually. All Chinese airlines in the Top 15 showed smaller fall. **China Southern, China Eastern** maintained the position of **5th** and **6th**, while **Air China** improved 1 position to **7th**.

Airlines in Europe demonstrated stronger recovery compared to the previous month, supported by the pick up of intra-European travel. Nevertheless, the three major airline groups, **AF-KLM**, **Lufthansa** and **IAG** recorded the largest contractions among the Top 15. **Aeroflot** and **Turkish Airlines** showed better performance owing to their domestic demand.

Qatar Airways returned to the Top 15 and ranked **14th**, albeit posting a large decline of **-56.5%**.

JUL 21

	RPK (billion)	Change over 2019	% Share of World Total	Cumulative % Share
American[1]	28.8	-19.5%	10.0%	10.0%
Delta[1]	23.8	-37.7%	8.3%	18.4%
United[1]	23.7	-37.1%	8.3%	26.6%
Southwest[1]	18.0	-9.0%	6.3%	32.9%
China Southern	17.6	-32.2%	6.1%	39.0%
China Eastern	12.2	-37.9%	4.3%	43.3%
Air China	11.9	-41.9%	4.1%	47.4%
AF-KLM[1]	11.8	-57.8%	4.1%	51.5%
Lufthansa Group[1]	11.8	-59.9%	4.1%	55.6%
Aeroflot	11.6	-29.3%	4.0%	59.7%
Turkish Airlines	9.9	-31.1%	3.5%	63.1%
IAG[1]	8.1	-70.9%	2.8%	66.0%
Jetblue Airways[1]	7.3	-9.8%	2.5%	68.5%
Qatar Airways	7.2	-56.5%	2.5%	71.0%
Hainan Airlines	7.1	-48.1%	2.5%	73.5%
Top 15 Total RPKs	*211 billion*	*-40.1%*	***73.5%***	
World Total RPKs	*287 billion*	*-60.1%*	***100.0%***	

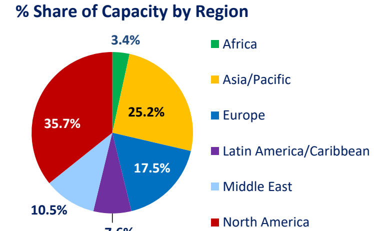
(Source: ICAO, airlines' websites)

***Note**: Total scheduled and non-scheduled services*

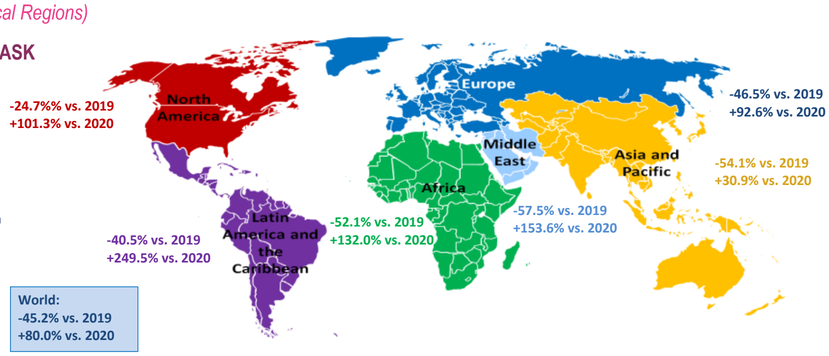
CAPACITY BY REGION *(ICAO Statistical Regions)*

JUL 2021: -45.2% (vs. 2019) in terms of World ASK

% Share of Capacity by Region



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



Worldwide capacity contracted by -45.2% in July 2021, compared to 2019. In line with the rising travel demand, seat capacity trended higher in all regions. The most significant increase was recorded by Europe as travel rebounded within Europe, both domestically and internationally. The Middle East also showed increase benefiting from the slowly improving international travel demand.

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

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.