ICAO

ECONOMIC DEVELOPMENT

APR 2022: Air Transport Monthly Monitor

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

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

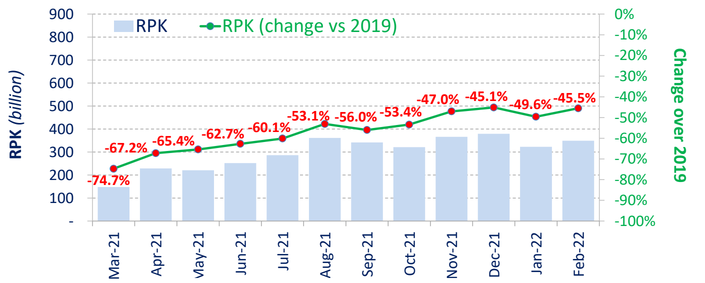
http://www.icao.int/sustainability/Pages/Air-Traffic-Monitor.aspx

GLOBAL KEY FIGURES	FEB 2022 (versus FEB 2019)	OUTLOOK* - MAR 2022 (versus MAR 2019)
	RPK ▼ -45.5% ASK ▼ -37.0% FTK ▲ 8.1% LF: 69.8% ▼ -10.8%	ASK ▼ -35.2% * Source OAG

PASSENGER TRAFFIC

Revenue Passenger-Kilometres - RPK

World passenger traffic fell by -45.5% in February 2022 (compared to 2019), +4.1 percentage points up from the decline in the previous month. Passenger traffic rebounded swiftly after trending sideways in January amid the proliferation of the Omicron variant. While the improvement in international air travel was broad-based, the performance of domestic travel was disparate across main markets. With signs of easing restrictions against Omicron, the positive recovery trend is likely to sustain in the following month.



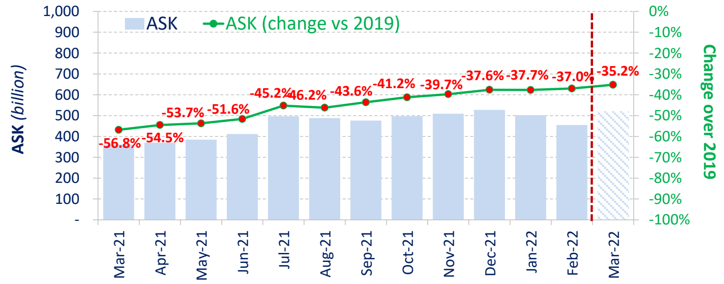
(Source: ICAO, IATA, OAG)

CAPACITY

Available Seat-Kilometres - ASK

Capacity worldwide fell by -37.0% in February 2022 (compared to 2019), +0.7 percentage point down from the decline in the previous month (**-37.7%**).

As Omicron related restrictions are being relaxed, the March capacity is expected to improve to -35.2% down from the 2019 level.

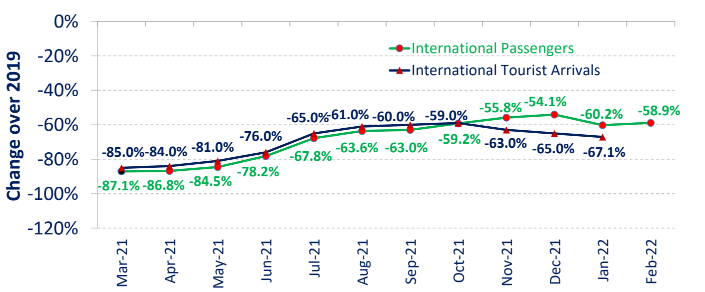


(Source: ICAO, IATA, OAG)

International Passengers vs. Tourist Arrivals

International passenger numbers fell by -58.9% in February 2022 (compared to 2019), +1.3 percentage points up from the decline in the previous month. All major regions, particularly Europe, demonstrated improvements.

The recovery in international tourist arrivals is expected to follow a similar trend as international air travel.



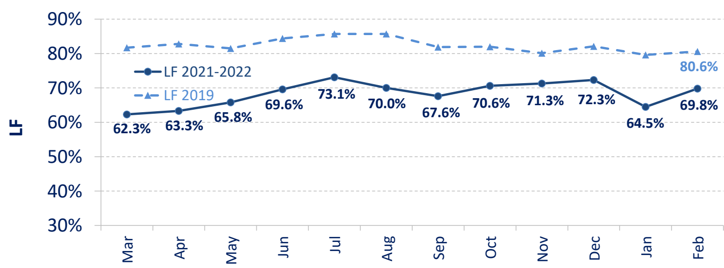
*UNWTO Definition

(Source: ICAO, UNWTO)

Load Factor - LF

The passenger Load Factor reached 69.8% in February 2022, +5.3 percentage points higher than the previous month.

Despite the improvement, the February LF remained -10.8 percentage points below the 2019 level.

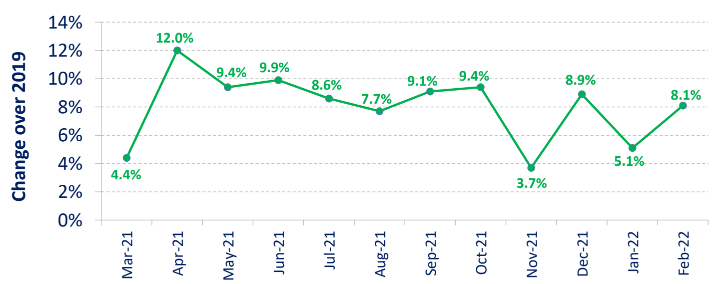


(Source: IATA)

FREIGHT TRAFFIC

Freight Tonne-Kilometres - FTK

World freight traffic reported a growth of +8.1% in February 2022 (compared to 2019), +3.0 percentage points up from the growth in the previous month. Air cargo continued to grow, owing to the reduced disruptions from Omicron variant and the rebound in activity exports post Chinese New Year. Nevertheless, the current economic situation and the conflict in Ukraine points to challenges to future air cargo growth. Performance of the regions was a mix. Africa and North America were leading the growth chart with double-digit growth, while the increases for Asia/Pacific, Europe and the Middle East were moderate. Latin America/Caribbean remained the only region posting declines compared to 2019.



(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

APR 2022: Air Transport Monthly Monitor

World Results and Analyses for FEB 2022. 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)

FEB 2022: -9.3%, -21.5%, and +17.3% (vs. 2019) in terms of aircraft departures, passengers and freight for the Top 15

FEB 22

Airports (ranking by number of departures)	Departures	vs. 2019
Atlanta GA, US (ATL)	28,446	-13.4%
Chicago IL, US (ORD)	25,238	-21.1%
Denver CO, US (DEN)	21,820	0.4%
Dallas/Fort Worth TX, US (DFW)	21,641	-14.7%
Los Angeles CA, US (LAX)	20,444	-19.8%
Las Vegas NV, US (LAS)	20,248	25.7%
Charlotte NC, US (CLT)	19,342	-10.4%
Miami FL, US (MIA)	18,945	7.2%
Phoenix AZ, US (PHX)	16,464	-3.5%
New York NY, US (JFK)	15,399	-7.0%
Guangzhou, CN (CAN)	15,256	-19.6%
Houston TX, US (IAH)	15,063	-16.0%
Shanghai, CN (PVG)	14,500	-27.4%
Long Beach CA, US (LGB)	14,446	23.6%
Seattle WA, US (SEA)	13,826	-7.9%

Airports (ranking by number of passengers)	Passengers*	vs.2019
Atlanta GA, US (ATL)	3,104,548	-18.7%
Denver CO, US (DEN)	2,296,980	0.1%
Dallas/Fort Worth TX, US (DFW)	2,141,675	-16.6%
Dubai, AE (DXB)	2,112,213	-38.3%
Los Angeles CA, US (LAX)	2,040,453	-32.6%
Chicago IL, US (ORD)	1,981,343	-26.9%
Miami FL, US (MIA)	1,921,120	2.9%
New Delhi, IN (DEL)	1,894,276	-29.5%
Orlando FL, US (MCO)	1,819,234	-7.4%
Istanbul, TR (IST)	1,774,216	-24.8%
Las Vegas NV, US (LAS)	1,672,542	-8.2%
Phoenix AZ, US (PHX)	1,643,737	-7.4%
Guangzhou, CN (CAN)	1,627,751	-44.7%
Charlotte NC, US (CLT)	1,574,259	-12.8%
New York NY, US (JFK)	1,543,022	-25.5%

Airports (ranking by tonnes of freight)	Freight**	vs. 2019
Memphis TN, US (MEM)	309,122	-9.0%
Hong Kong SAR, CN (HKG)	270,000	0.2%
Shanghai, CN (PVG)	261,984	35.9%
Anchorage AK, US (ANC)	245,512	54.9%
Incheon, KR (ICN)	234,248	32.8%
Louisville KY, US (SDF)	206,558	17.9%
Miami FL, US (MIA)	195,288	21.1%
Tokyo, JP (NRT)	195,134	37.6%
Taipei, CN (TPE)	190,195	52.3%
Los Angeles CA, US (LAX)	188,504	38.8%
Doha, QA (DOH)	179,754	16.6%
Dubai, AE (DXB)	161,292	-17.5%
Chicago IL, US (ORD)	159,176	37.8%
Frankfurt, DE (FRA)	158,297	4.1%
Paris, FR (CDG)	142,058	-4.2%

Note: Total scheduled and non-scheduled services

(Source: ACI)

In terms of **aircraft departures**, the Top 15 airports reported a combined fall of **-9.3%**, compared to 2019. All but two of the Top 15 airports were US airports. **Atlanta** remained **1st** with a decline of **-13.4%**. Four airports posted increases, i.e. **Denver**, **Las Vegas**, **Miami** and **Long Beach.** The two Chinese airports posted relatively large falls compared to the other Top 15.

In terms of **passengers**, the Top 15 airports posted a total fall of **-21.5%,** compared to 2019. US airports continued to dominant the list, with 11 in the Top 15. **Atlanta** remained **1st** with a decline of **-18.7%**. **Guangzhou** record the largest fall of **-44.7%**, followed by **Dubai** at **-38.3%**. On the positive side, two airports, i.e. **Denver** and **Miami**, posted growth over 2019.

In terms of **freight**, the Top 15 airports reported an increase of **+17.3%**, compared to 2019. Majority of the Top 15 airports grew double-digitally, with **Anchorage** recording the strongest growth at a robust **+54.9%**. Despite the decline of **-9.0%**, **Memphis** overtook **Hong Kong** became **1st**. For the six consecutive month, **Dubai** posted the largest fall.

TOP 15 AIRLINE GROUPS (Ranked by RPK)

FEB 2022: -37.5% (vs. 2019) in terms of RPK for the Top 15

FEB 22

In terms of RPK, the Top 15 airline groups accounted for 45.2% of the world's total RPK in February 2022 and declined by -37.5% compared to 2019. This decline was 7.6 percentage points smaller than the fall in world's average RPK.

February rankings fluctuated, particularly amongst the European airlines.

The U.S. airlines retained the Top 4 positions, with **American** at **1st**, followed by **United, Delta** and **Southwest**. All of the four airlines also posted smaller declines compared to December 2021.

The Chinese domestic traffic improved slightly due to the timing of the Chinese New Year. As a result, **Air China** re-appeared in the Top 15 at **14th**. **China Southern** and **China Eastern** improved respectively 1 and 2 positions to **5th** and **13th**.

Rankings of the European airlines fluctuated notably, impacted by a combination of easing travel restrictions and the conflict in Ukraine. While **AF-KLM** and **Lufthansa** dropped 2 and 3 positions, **IAG** climbed 5 positions.

Performance of airlines in the Middle East was consistent, with **Emirates** and **Qatar** maintaining similar positions as the previous month.

Airline group	RPK (billion)	Change over 2019	% Share of World Total	Cumulative % Share
American[1]	20.4	-20.6%	5.4%	5.4%
United[1]	19.2	-22.7%	5.1%	10.4%
Delta[1]	17.0	-30.0%	4.5%	14.9%
Southwest[1]	13.2	-12.7%	3.5%	18.4%
China Southern	11.8	-47.8%	3.1%	21.5%
Emirates	10.9	-50.6%	2.9%	24.4%
AF-KLM[1]	10.8	-46.6%	2.8%	27.2%
IAG[1]	10.3	-44.2%	2.7%	29.9%
Ryanair[1]	10.3	-17.1%	2.7%	32.6%
Qatar Airways	9.3	-25.0%	2.4%	35.1%
Lufthansa Group[1]	8.7	-53.6%	2.3%	37.4%
Turkish Airlines	8.3	-21.8%	2.2%	39.6%
China Eastern	8.1	-55.5%	2.1%	41.7%
Air China	6.8	-63.6%	1.8%	43.5%
Aeroflot	6.5	-36.7%	1.7%	45.2%
Top 15 Total RPKs	*171 billion*	*-37.5%*	***45.2%***	
World Total RPKs	*379 billion*	*-45.1%*	***100.0%***	

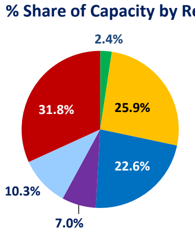
(Source: ICAO, airlines' websites)

Note: Total scheduled and non-scheduled services

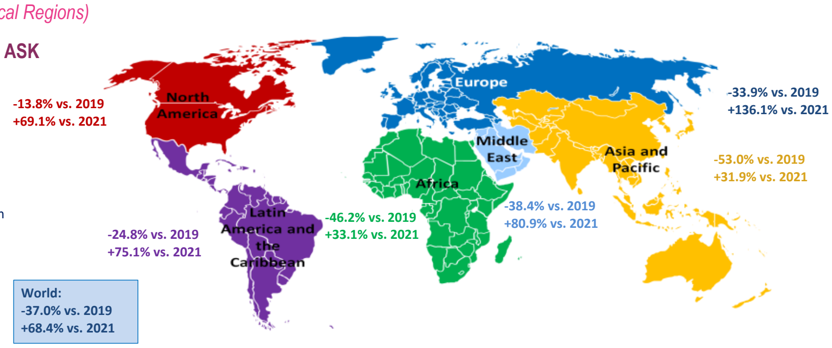
CAPACITY BY REGION *(ICAO Statistical Regions)*

FEB 2022: -37.0% (vs. 2019) in terms of World ASK

% Share of Capacity by Region



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



Worldwide capacity contracted by -37.0% in February 2022, compared to 2019. Following a marginal impact from the Omicron disruption in January, passenger capacity rebounded.

North America demonstrated the most resilience with capacity close to the level saw pre-crisis. Asia/Pacific continued to be the slowest recovering region.

* 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.