ICAO

ECONOMIC DEVELOPMENT

JUL 2022: Air Transport Monthly Monitor

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

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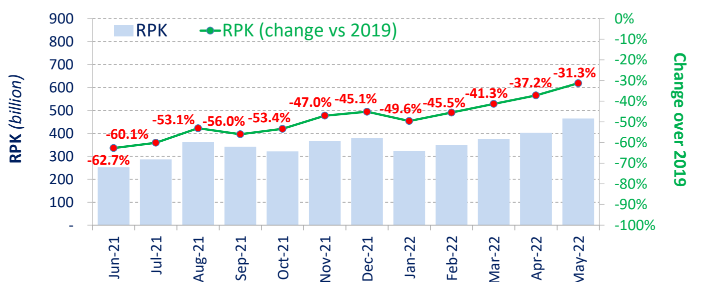
http://www.icao.int/sustainability/Pages/Air-Traffic-Monitor.aspx

GLOBAL KEY FIGURES	MAY 2022 (versus MAY 2019)	OUTLOOK* - JUN 2022 (versus JUN 2019)
	RPK ▼ -31.3% ASK ▼ -28.9% CTK ▼ -2.0% LF: 79.1% ▼ -2.4%	ASK ▼ -24.8% * Source OAG

PASSENGER TRAFFIC

Revenue Passenger-Kilometres - RPK

World passenger traffic in May 2022 was -31.3% below the 2019 level, +5.9 percentage points up from the decline in the previous month. Air travel recovery continued to accelerate, driven by the strong international travel rebound. The pent-up travel demand has been defying the challenging economic backdrop of high inflation and fuel prices. Domestic traffic recovery was moderate, affected by the decline in Chinese domestic market. All regions, except for North America, recorded traffic improvements compared to the previous month.



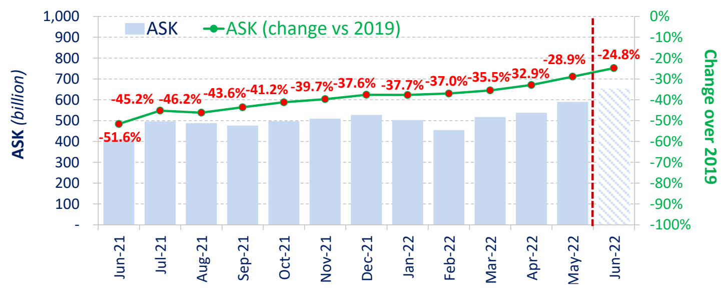
(Source: ICAO, IATA, OAG)

CAPACITY

Available Seat-Kilometres - ASK

Capacity worldwide in May 2022 was -28.9% below the 2019 level, +4.0 percentage points up from the decline in the previous month (**-32.9%**).

As air travel recovery continues, capacity offered in June is expected to increase to -24.8% down from the 2019 level.

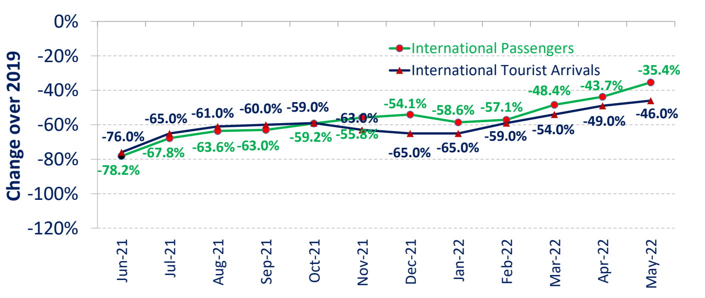


(Source: ICAO, IATA, OAG)

International Passengers vs. Tourist Arrivals

International passenger numbers in May 2022 was -35.4% below the 2019 level, +8.3 percentage points up from the decline in the previous month. International air travel recovery improved across all regions, except for Latina America/Caribbean. The Middle East registered the most significant month-on-month improvement.

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



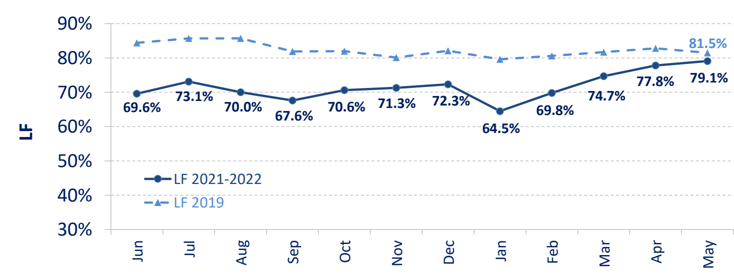
*UNWTO Definition

(Source: ICAO, UNWTO)

Load Factor - LF

The passenger Load Factor reached 79.1% in May 2022, +1.3 percentage points higher than the previous month.

Load factor climbed to pre-pandemic level, and the May level was merely -2.4 percentage points down compared to May 2019.

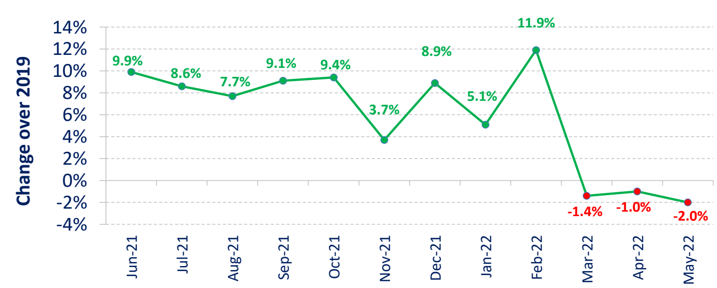


(Source: IATA)

CARGO TRAFFIC

Cargo Tonne-Kilometres - CTK

World cargo traffic in May 2022 was -2.0% below the 2019 level, -1.0 percentage point down from the decline in the previous month. Air cargo traffic remained on a sideways trend with a deterioration in the decline. The volatility in cargo traffic was attributed to multiple macroeconomic factors such as the softening in global trade and the ongoing disruptions on supply chain due to the war. Whereas Europe saw the most noticeable deterioration, Asia/Pacific was the only region recording month-on-month improvements, owing to the increasing manufacturing activities as the lockdown in China was eased. Despite the slowdown, North America and Africa continued to post positive growth over the pre-pandemic level.



(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.

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

MAY 2022: -9.4%, -11.4%, and +1.6% (vs. 2019) in terms of aircraft movements, passengers and freight for the Top 15

MAY 22

Airports (ranking by number of departures)	Movements	vs. 2019
Chicago IL, US (ORD)	62,287	-22.0%
Dallas/Fort Worth TX, US (DFW)	56,913	-7.3%
Atlanta GA, US (ATL)	56,891	-27.8%
Las Vegas NV, US (LAS)	51,487	22.2%
Denver CO, US (DEN)	50,614	-5.6%
Los Angeles CA, US (LAX)	48,721	-16.3%
Charlotte NC, US (CLT)	42,267	-14.1%
Miami FL, US (MIA)	40,885	17.8%
Amsterdam, NL (AMS)	40,691	-12.5%
New York NY, US (JFK)	38,516	-2.7%
Istanbul, TR (IST)	37,578	3.8%
Newark NJ, US (EWR)	37,497	-0.2%
Paris, FR (CDG)	37,104	-15.4%
New Delhi, IN (DEL)	37,076	-1.3%
Frankfurt, DE (FRA)	36,565	-20.8%

Airports (ranking by number of passengers)	Passengers*	vs.2019
Atlanta GA, US (ATL)	8,398,234	-15.1%
Dallas/Fort Worth TX, US (DFW)	6,637,523	1.2%
Chicago IL, US (ORD)	6,095,049	-20.3%
Denver CO, US (DEN)	5,982,477	-1.0%
Los Angeles CA, US (LAX)	5,835,467	-23.4%
Istanbul, TR (IST)	5,661,151	8.1%
London, GB (LHR)	5,341,644	-21.1%
New Delhi, IN (DEL)	5,238,965	-0.8%
Paris, FR (CDG)	5,227,412	-19.1%
Amsterdam, NL (AMS)	5,217,649	-19.0%
New York NY, US (JFK)	4,769,615	-14.6%
Dubai, AE (DXB)	4,724,229	-9.1%
Frankfurt, DE (FRA)	4,580,326	-26.4%
Las Vegas NV, US (LAS)	4,580,140	-0.5%
Miami FL, US (MIA)	4,455,699	17.6%

Airports (ranking by tonnes of freight)	Freight**	vs. 2019
Hong Kong SAR, CN (HKG)	363,000	-8.3%
Memphis TN, US (MEM)	329,489	-13.1%
Anchorage AK, US (ANC)	301,412	27.4%
Incheon, KR (ICN)	254,390	15.2%
Louisville KY, US (SDF)	230,907	1.8%
Taipei, CN (TPE)	221,850	21.4%
Los Angeles CA, US (LAX)	208,270	21.8%
Shanghai, CN (PVG)	197,996	-33.9%
Miami FL, US (MIA)	196,103	3.1%
Tokyo, JP (NRT)	194,948	18.9%
Paris, FR (CDG)	190,164	10.9%
Doha, QA (DOH)	190,088	0.2%
Chicago IL, US (ORD)	181,293	21.2%
Frankfurt, DE (FRA)	165,858	-5.1%
Singapore, SG (SIN)	153,400	-10.7%

__Note__: Total scheduled and non-scheduled services

(Source: ACI)

In terms of **aircraft movements**, the Top 15 airports reported a combined fall of **-9.4%**, compared to 2019. Ten out of the Top 15 airports were US airports. **Chicago** overtook Atlanta and ranked **1st,** albeit with a decline of **-22.0%**. **Atlanta** became **3rd** and recorded the largest decline of **-27.8%**. Three airports posted increases, i.e. **Las Vegas**, **Miami**, and **Istanbul**.

In terms of **passengers**, the Top 15 airports posted a total fall of **-11.4%,** compared to 2019. Over half of the Top 15 airports were US airports. **Atlanta** remained **1st** with a decline of **-15.1%**. The largest fall was recorded by **Frankfurt** at **-26.4%**, followed by **Los Angeles** (**-23.4%**) and **London Heathrow** (**-21.1%**). Three airports posted increases, i.e. **Miami**, **Istanbul**, and **Dallas/Fort Worth**.

In terms of **freight**, the Top 15 airports reported an increase of **+1.6%**, compared to 2019. Ten out of the Top 15 airports posted increase, including seven with double-digital growth. **Anchorage** recorded the strongest growth at **+27.4%**, followed by **Los Angeles** at **+21.8%**. **Shanghai** recorded the largest fall of **-33.9%**, followed by **Memphis** at **-13.1%**.

TOP 15 AIRLINE GROUPS (Ranked by RPK)

MAY 2022: -15.3% (vs. 2019) in terms of RPK for the Top 15

In terms of RPK, the Top 15 airline groups accounted for 53.9% of the world's total RPK in May 2022 and declined by -15.3% compared to 2019. This decline was 16 percentage points smaller than the fall in world's average RPK.

With the continued ease of travel restrictions and pent-up demand, the Top 15 airlines saw smaller declines compared to the previous month. Due to the lingering lockdown, the major Chinese airlines were still out of the Top 15 list.

The U.S. airlines retained the Top 3 positions, with **American** at **1st**, followed by **United** and **Delta**. Rankings of **Southwest**, **Jetblue** and **Alaska**, however, dropped slightly.

Airlines in Europe continued to show improvements supported by the surge in international travel, especially the Within Europe traffic. Both **IAG** and **Lufthansa** moved up 1 position from **4th** to **5th**.

Performance of airlines in the Middle East were relatively stable. **Emirates** maintained the **8th** position, while **Qatar** dropped 1 position to **11th**.

Singapore Airlines re-appeared in the Top 15 for the first time since the pandemic and ranked **14th** with a decline of **-36.2%** in RPK from the 2019 level.

MAY 22

Airline group	RPK (billion)	Change over 2019	% Share of World Total	Cumulative % Share
American[1]	31.5	-4.0%	6.8%	6.8%
United[1]	30.7	-7.2%	6.6%	13.4%
Delta[1]	28.8	-14.9%	6.2%	19.6%
IAG[1]	18.7	-24.5%	4.0%	23.6%
Lufthansa Group[1]	17.7	-32.5%	3.8%	27.5%
Southwest[1]	17.6	-6.2%	3.8%	31.2%
Ryanair[1]	16.9	8.5%	3.6%	34.9%
Emirates	15.7	-22.0%	3.4%	38.3%
AF-KLM[1]	15.6	-40.5%	3.3%	41.6%
Turkish Airlines	14.1	15.8%	3.0%	44.6%
Qatar Airways	12.7	-1.3%	2.7%	47.4%
Air Canada[1]	8.1	-31.1%	1.8%	49.1%
Jetblue Airways[1]	7.6	2.5%	1.6%	50.8%
Singapore Airlines Group	7.5	-36.2%	1.6%	52.4%
Alaska Airlines[1]	7.0	-10.4%	1.5%	53.9%
Top 15 Total RPKs	*250 billion*	*-15.3%*	***53.9%***	
World Total RPKs	*464 billion*	*-31.3%*	***100.0%***	

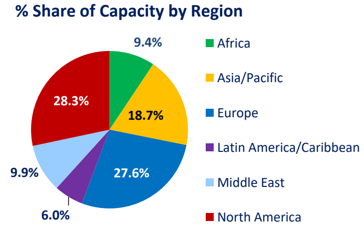
(Source: ICAO, airlines' websites)

__Note__: Total scheduled and non-scheduled services

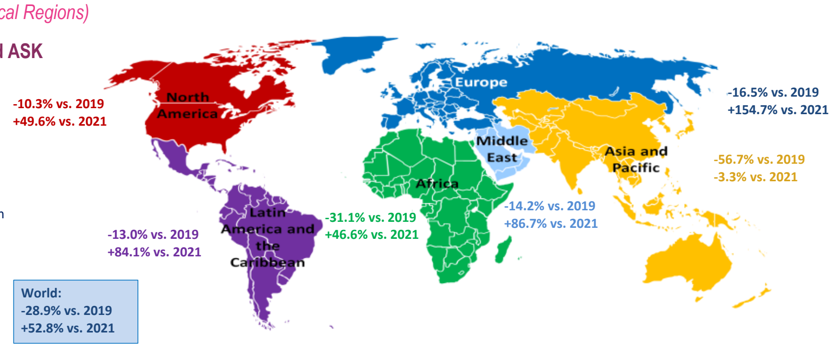
CAPACITY BY REGION *(ICAO Statistical Regions)*

MAY 2022: -28.9% (vs. 2019) in terms of World ASK

% Share of Capacity by Region



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



Worldwide capacity contracted by -28.9% in May 2022, compared to 2019. Airlines continued to increase capacity in tandem with the rebound in travel demand.

All regions posted smaller declines in capacity compared to the previous month. The most significant month-on-month improvement was recorded by the Middle East followed by Africa.

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

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