ICAO

ECONOMIC DEVELOPMENT

MAY 2022: Air Transport Monthly Monitor

World Results and Analyses for MAR 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

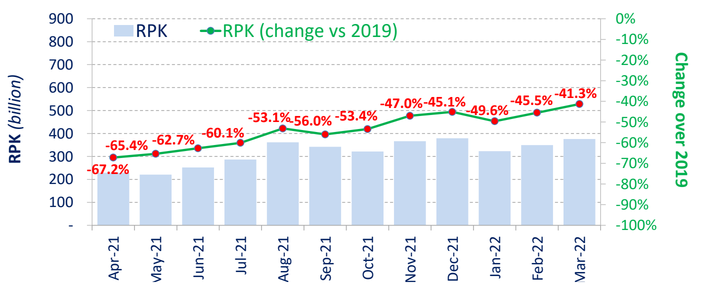
MAR 2022
(versus MAR 2019)
RPK ▼ -41.3% **ASK** ▼ -35.5% **FTK** ▼ -1.4% **LF**: 74.7% ▼ -7.0%

OUTLOOK* - APR 2022
(versus APR 2019)
ASK ▼ -31.9% * Source OAG

PASSENGER TRAFFIC

Revenue Passenger-Kilometres - RPK

World passenger traffic fell by -41.3% in March 2022 (compared to 2019), +4.2 percentage points up from the decline in the previous month. The upward trend in air travel recovery since February was the result of the relaxation of restrictions against Omicron and the solid travel demand. The improvement in domestic air travel however weakened, mainly due to the significant fall in China's domestic travel, impacted by the new lockdown and tightened travel restrictions. As the COVID-19 related restrictions are being eased, global air travel recovery is expected to continue.

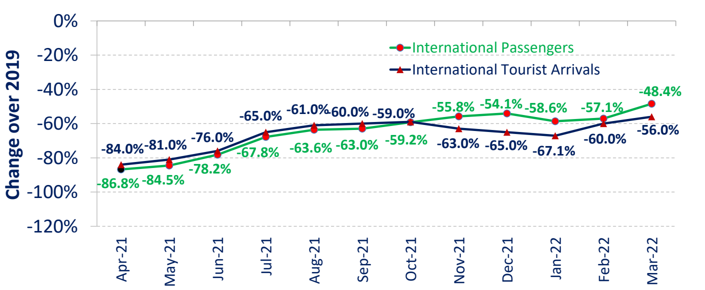


(Source: ICAO, IATA, OAG)

International Passengers vs. Tourist Arrivals

International passenger numbers fell by -48.4% in March 2022 (compared to 2019), +8.7 percentage points up from the decline in the previous month. International air travel recovery accelerated in all regions including Asia/Pacific, albeit at a slower pace. The strongest improvement was recorded by Europe, followed by the Middle East.

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



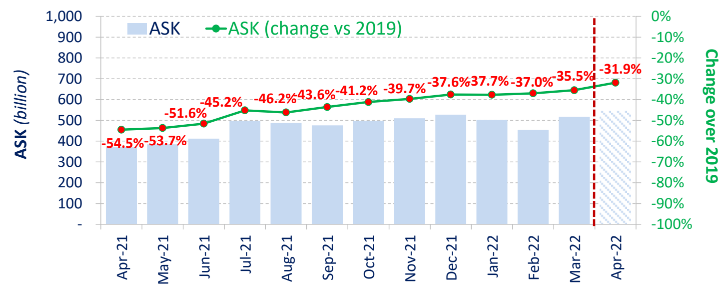
*UNWTO Definition (Source: ICAO, UNWTO)

CAPACITY

Available Seat-Kilometres - ASK

Capacity worldwide fell by -35.5% in March 2022 (compared to 2019), +1.5 percentage point down from the decline in the previous month (**-37.0%**).

As load factor races to reach pre-pandemic levels, the capacity in April is expected to improve to -31.9% down from the 2019 level.

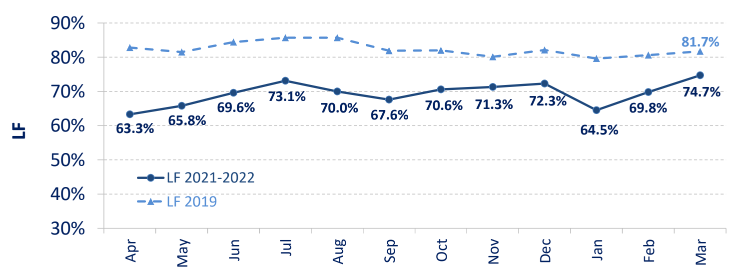


(Source: ICAO, IATA, OAG)

Load Factor - LF

The passenger Load Factor reached 74.7% in March 2022, +4.9 percentage points higher than the previous month.

Despite the improvement, the March LF remained -7.0 percentage points below the 2019 level.

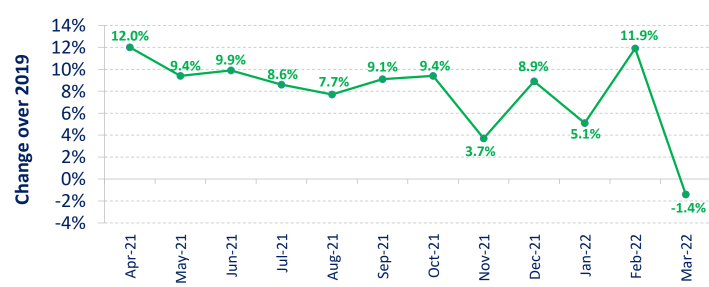


(Source: IATA)

CARGO TRAFFIC

Cargo Tonne-Kilometres - CTK

World freight traffic reported a decline of -1.4% in March 2022 (compared to 2019), -13.3 percentage points down from the growth in the previous month. For the first time since January 2021, air cargo recorded negative growth from the 2019 pre-crisis level. Unlike the passenger traffic, both the Omicron related restrictions, especially in Asia/Pacific, and the Ukraine-Russia conflict have strongly impacted the global trade which in turn dampened the air cargo demand. Europe recorded the largest decline compared to the 2019 levels, followed by Asia/Pacific, Latin America/Caribbean and the Middle East. While Africa and North America remained above the pre-crisis levels, their growth slowed down substantially compared to the previous month.



(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)

MAR 2022: -10.3%, -14.2%, and +7.7% (vs. 2019) in terms of aircraft movements, passengers and freight for the Top 15

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Airports (ranking by number of departures)	Movements	vs. 2019
Atlanta GA, US (ATL)	60,913	-22.0%
Chicago IL, US (ORD)	60,369	-20.9%
Dallas/Fort Worth TX, US (DFW)	54,298	-7.1%
Denver CO, US (DEN)	49,155	-1.0%
Las Vegas NV, US (LAS)	48,709	25.2%
Los Angeles CA, US (LAX)	46,816	-20.2%
Charlotte NC, US (CLT)	42,942	-13.3%
Miami FL, US (MIA)	42,088	11.2%
Phoenix AZ, US (PHX)	38,265	-5.6%
New Delhi, IN (DEL)	36,089	-4.3%
New York NY, US (JFK)	35,469	-9.0%
Houston TX, US (IAH)	34,880	-16.8%
Newark NJ, US (EWR)	33,583	-13.2%
Amsterdam, NL (AMS)	32,276	-21.8%
Seattle WA, US (SEA)	32,090	-10.3%

Airports (ranking by number of passengers)	Passengers*	vs.2019
Atlanta GA, US (ATL)	7,890,089	-18.0%
Dallas/Fort Worth TX, US (DFW)	5,935,624	-2.8%
Chicago IL, US (ORD)	5,677,533	-19.5%
Denver CO, US (DEN)	5,617,325	3.0%
Dubai, AE (DXB)	5,494,005	-27.0%
Los Angeles CA, US (LAX)	5,205,974	-29.4%
New Delhi, IN (DEL)	5,076,301	-7.4%
Miami FL, US (MIA)	4,663,909	10.8%
Orlando FL, US (MCO)	4,554,690	-4.6%
Istanbul, TR (IST)	4,355,403	-19.1%
Las Vegas NV, US (LAS)	4,273,324	-3.4%
Phoenix AZ, US (PHX)	4,263,828	-5.7%
New York NY, US (JFK)	4,212,363	-18.3%
London, GB (LHR)	4,197,239	-35.7%
Charlotte NC, US (CLT)	3,992,319	-7.7%

Airports (ranking by tonnes of freight)	Freight**	vs. 2019
Memphis TN, US (MEM)	376,400	-2.3%
Hong Kong SAR, CN (HKG)	349,000	-17.3%
Shanghai, CN (PVG)	308,293	-0.1%
Anchorage AK, US (ANC)	307,553	27.2%
Incheon, KR (ICN)	277,785	16.0%
Louisville KY, US (SDF)	248,179	21.8%
Taipei, CN (TPE)	236,842	26.3%
Tokyo, JP (NRT)	227,312	22.4%
Los Angeles CA, US (LAX)	223,715	25.0%
Miami FL, US (MIA)	218,055	24.1%
Doha, QA (DOH)	215,581	12.8%
Chicago IL, US (ORD)	189,899	24.5%
Dubai, AE (DXB)	188,941	-19.0%
Guangzhou, CN (CAN)	177,989	13.4%
Frankfurt, DE (FRA)	173,909	-8.9%

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

(Source: ACI)

In terms of **aircraft movements**, the Top 15 airports reported a combined fall of **-10.3%**, compared to 2019. All but two of the Top 15 airports were US airports. **Atlanta** remained **1st** with a decline of **-22.0%**. **New Delhi** and **Amsterdam** re-appeared in the Top 15, and the former posted the second smallest decline within the Top 15. Two airports posted increases, i.e. **Las Vegas** and **Miami.**

In terms of **passengers**, the Top 15 airports posted a total fall of **-14.2%,** compared to 2019. US airports continued to dominant the list, with 11 in the Top 15. **Atlanta** remained **1st** with a decline of **-18.0%**. **London** recorded the largest fall of **-35.7%**, followed by **Los Angeles** at **-29.4%**. For the second consecutive month, **Denver** and **Miami** posted positive growth over 2019.

In terms of **freight**, the Top 15 airports reported an increase of **+7.7%**, compared to 2019. Ten out of the Top 15 airports posted increase with double-digital growth. **Anchorage** recorded the strongest growth at **+27.2**%, followed by **Taipei** at **+26.3%**. The Top 3 airports, however, showed declines compared to the pre-pandemic levels.

TOP 15 AIRLINE GROUPS (Ranked by RPK)

MAR 2022: -30.0% (vs. 2019) in terms of RPK for the Top 15

In terms of RPK, the Top 15 airline groups accounted for 59.7% of the world's total RPK in March 2022 and declined by -30.0% compared to 2019. This decline was 19.6 percentage points smaller than the fall in world's average RPK.

Most airlines in the Top 15 showed smaller declines compared to February owing to the ease of travel restrictions.

The U.S. airlines retained the Top 4 positions, with **American** at **1st**, followed by **United, Delta** and **Southwest**. With the solid recovery in domestic traffic, both Jetblue and Alaska ranked in the Top 15.

Airlines in Europe continued to show improvements especially in international traffic as the restrictions in the region have been gradually relaxed. **IAG** improved most noticeably and moved up 3 positions from **8th** to **5th**.

The Chinese domestic traffic experienced a sharp decline, impacted by lockdowns and tightened travel restrictions to control the spread of the Omicron variant. As a result, out of the major Chinese airlines, only **China Southern** retained its position within the Top 15.

Performance of airlines in the Middle East also improved. While **Emirates** maintained the **6th** position, **Qatar** climbed 2 positions to **8th**.

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Airline group	RPK *(billion)*	Change over 2019	% Share of World Total	Cumulative % Share
American[1]	28.3	-11.9%	8.7%	8.7%
United[1]	26.7	-18.6%	8.3%	17.0%
Delta[1]	24.2	-24.7%	7.5%	24.5%
Southwest[1]	17.1	-10.0%	5.3%	29.8%
IAG	13.3	-40.2%	4.1%	33.9%
Emirates[1]	12.7	-48.6%	3.9%	37.9%
AF-KLM[1]	12.7	-45.4%	3.9%	41.8%
Qatar Airways[1]	11.9	-13.2%	3.7%	45.5%
Lufthansa Group[1]	11.8	-48.7%	3.7%	49.2%
Ryanair	11.6	-14.5%	3.6%	52.7%
Turkish Airlines[1]	10.4	-12.9%	3.2%	56.0%
Jetblue Airways	7.4	-2.5%	2.3%	58.3%
Alaska Airlines	6.5	-13.4%	2.0%	60.3%
LATAM Airlines Group	6.9	-33.5%	2.1%	62.4%
China Southern	6.4	-71.9%	2.0%	64.4%
Top 15 Total RPKs	*208 billion*	*-30.0%*	***64.4%***	
World Total RPKs	*323 billion*	*-49.6%*	***100.0%***	

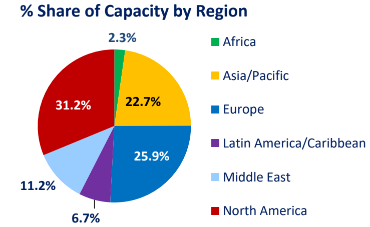
(Source: ICAO, airlines' websites)

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

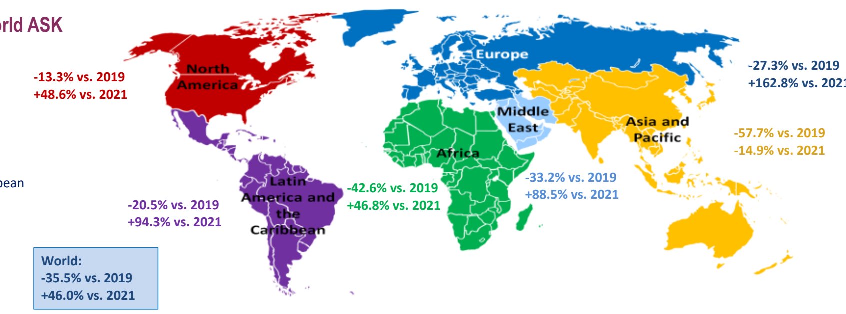
CAPACITY BY REGION *(ICAO Statistical Regions)*

MAR 2022: -35.5% (vs. 2019) in terms of World ASK

% Share of Capacity by Region



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



Worldwide capacity contracted by -35.5% in March 2022, compared to 2019. Passenger capacity continues to rebound as demand is returning along with the gradual ease of travel restrictions.

North America demonstrated the most resilience with capacity approaching the pre-crisis level. Asia/Pacific continued to be the slowest recovering region, and was the only region experiencing deterioration.

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

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