



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

### GLOBAL KEY FIGURES

**JUN 2018**  
(versus JUN 2017)

**RPK** ▲ +7.8% **ASK** ▲ +6.5% **FTK** ▲ +2.7% **LF**: 82.8% ▲ +0.9 pt

**OUTLOOK\* - JUL 2018**  
(versus JUL 2017)

**ASK** ▲ +6.0% \* Source OAG

### PASSENGER TRAFFIC

#### Revenue Passenger-Kilometres - RPK

World passenger traffic grew by +7.8% YoY in June 2018, +1.7 percentage points up from the growth in the previous month. The YTD growth of the first half of the year remained solid albeit with slight moderation compared to last year, mainly due to the increase of oil price. Four regions, Africa, Asia/Pacific, the Middle East and North America, accelerated in traffic growth, with the most significant improvement observed in the Middle East. Domestic traffic demand in India and China continued to be strong, and both grew double-digitally.



(Source: ICAO, IATA, OAG)

### CAPACITY

#### Available Seat-Kilometres - ASK

Capacity worldwide increased by +6.0% YoY in June 2018, -0.5 percentage point lower than the growth in the previous month (+6.5%).

According to the airline schedules, the expansion of capacity is expected to be at +6.0% in July 2018.

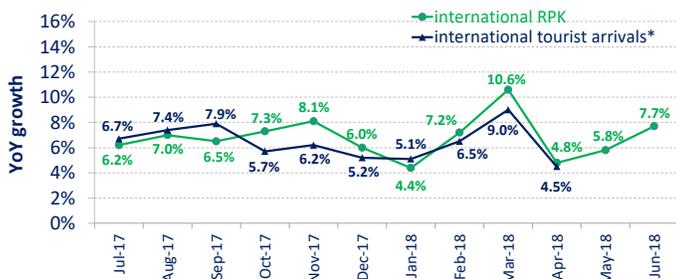


(Source: ICAO, IATA, OAG)

#### International Traffic vs. Tourist Arrivals

International passenger traffic grew by +7.7% YoY in June 2018, +1.9 percentage points higher from the growth in the previous month. Similar to total passenger traffic, the four regions accelerated in growth. Africa and the Middle East became the fastest growing regions and both grew double-digitally.

The growth of international tourist arrivals\* followed a similar monthly trend.



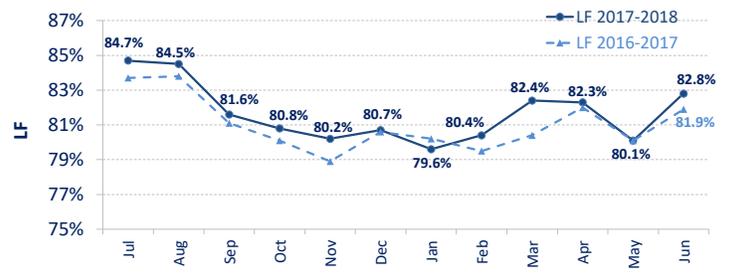
(Source: IATA, UNWTO)

\*UNWTO Definition

#### Load Factor - LF

The passenger Load Factor reached 82.8% in June 2018, +2.7 percentage points higher than the LF recorded in the previous month.

As traffic growth outpaced the capacity expansion, the June LF was +0.9 percentage points higher than the rate in the same period in 2017.

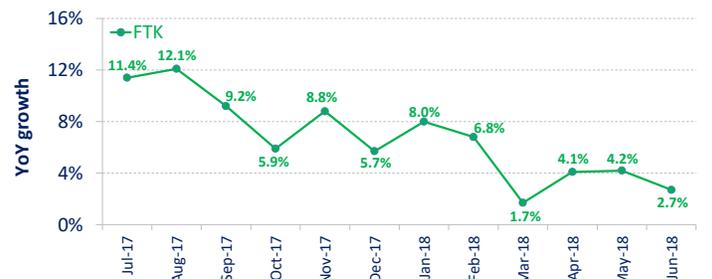


(Source: IATA)

### FREIGHT TRAFFIC

#### Freight Tonne-Kilometres - FTK

World freight traffic grew by +2.7% YoY in June 2018, -1.5 percentage points lower than the growth in the previous month. Traffic growth moderated partially impacted by the temporary flight suspension of Nippon Cargo Airlines. The overall growth of freight traffic in the first six months slowed down compared to last year. All regions, except for Europe and the Middle East, posted a deceleration in growth. Africa experienced the most significant slowdown and continued to be the only region with negative growth. Asia/Pacific, the largest region of freight traffic, posted a dampened growth, impacted by the rising trade tension. Latin America/Caribbean continued to be the fastest growing region albeit showing a major slow down.



(Source: IATA)

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

JUN 2018: +2.3%, +6.3%, and -0.2% YoY in terms of aircraft departures, passengers and freight for the Top 15

JUN 18

Airports (ranking by number of departures)	Departures	YoY	Airports (ranking by number of passengers)	Passengers*	YoY	Airports (ranking by tonnes of freight)	Freight**	YoY
Chicago IL, US (ORD)	39,185	↑ 3.7%	Atlanta GA, US (ATL)	4,779,678	↑ 1.5%	Hong Kong, CN (HKG)	416,000	↑ 1.4%
Atlanta GA, US (ATL)	38,856	↑ 0.4%	Beijing, CN (PEK)	4,088,717	↑ 7.1%	Memphis TN, US (MEM)	375,960	↑ 2.7%
Los Angeles CA, US (LAX)	30,573	↑ 1.5%	Los Angeles CA, US (LAX)	4,006,347	↑ 3.7%	Shanghai, CN (PVG)	306,667	↓ -2.3%
Dallas/Fort Worth TX, US (DFW)	29,368	↑ 4.8%	Chicago IL, US (ORD)	3,860,151	↑ 4.6%	Incheon, KR (ICN)	236,897	↑ 1.8%
Denver CO, US (DEN)	26,386	↑ 4.0%	London, GB (LHR)	3,563,534	↑ 5.4%	Anchorage AK, US (ANC)	231,890	↓ -2.5%
Beijing, CN (PEK)	24,899	↑ 3.2%	Dubai, AE (DXB)	3,397,746	↑ 11.7%	Dubai, AE (DXB)	214,612	↓ -0.5%
Amsterdam, NL (AMS)	22,639	↓ -0.8%	Tokyo, JP (HND)	3,335,094	↓ -0.7%	Louisville KY, US (SDF)	202,631	↓ -4.3%
Frankfurt, DE (FRA)	22,609	↑ 8.9%	Paris, FR (CDG)	3,248,735	↑ 6.3%	Taipei, CN (TPE)	192,068	↑ 3.1%
Charlotte NC, US (CLT)	22,520	↓ -5.5%	Dallas/Fort Worth TX, US (DFW)	3,233,496	↑ 7.2%	Los Angeles CA, US (LAX)	180,737	↓ -0.6%
Paris, FR (CDG)	21,349	↑ 1.6%	Amsterdam, NL (AMS)	3,192,869	↑ 3.8%	Tokyo, JP (NRT)	180,727	↓ -6.4%
Shanghai, CN (PVG)	20,864	↑ 3.7%	Frankfurt, DE (FRA)	3,182,877	↑ 9.8%	Doha, QA (DOH)	178,393	↑ 4.4%
Toronto ON, CA (YYZ)	20,707	↑ 2.1%	Shanghai, CN (PVG)	3,120,289	↑ 10.3%	Frankfurt, DE (FRA)	173,573	↓ -2.8%
San Francisco CA, US (SFO)	20,518	↑ 2.5%	Hong Kong, CN (HKG)	3,097,500	↑ 5.3%	Beijing, CN (PEK)	170,784	↑ 2.1%
London, GB (LHR)	20,257	↓ -0.3%	Denver CO, US (DEN)	2,952,515	↑ 4.5%	Singapore, SG (SIN)	170,500	↓ -0.9%
Jakarta, ID (CGK)	20,196	↑ 5.9%	Jakarta, ID (CGK)	2,936,646	↑ 22.6%	Paris, FR (CDG)	165,553	↓ -1.0%

Note: Total scheduled and non-scheduled services

(Source: ACI)

In terms of **aircraft departures**, the Top 15 airports reported a growth of **+2.3%** YoY. Twelve out of the Top 15 airports posted YoY increases. The strongest growth in operations was recorded by **Frankfurt** at **+8.9%**, followed by **Jakarta** (**+5.9%**). **Charlotte** posted the biggest decline of **-5.5%**, impacted by the flight cancellations of American Airlines.

In terms of **passengers**, the Top 15 airports reported a growth of **+6.3%** YoY. All the Top 15 airports posted YoY increases, except for **Tokyo** with a minor decline of **-0.7%**. Passenger traffic at **Dubai** and **Jakarta** topped the list in terms of YoY increase, owing to the impact of the Eid Al Fitr holiday. **Atlanta** retained the 1st position with a growth of **+1.5%**.

In terms of **freight**, the Top 15 airports reported a decline of **-0.2%** YoY. More than half of the Top 15 airports posted YoY declines, indicating a overall moderation in freight traffic growth. The most significant decrease was experienced by **Tokyo** (**-6.4%**), mainly due to the temporary ground of all Nippon Cargo aircraft.

### TOP 15 AIRLINE GROUPS (Ranked by RPK)

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JUN 2018: +7.2% YoY in terms of RPK for the Top 15

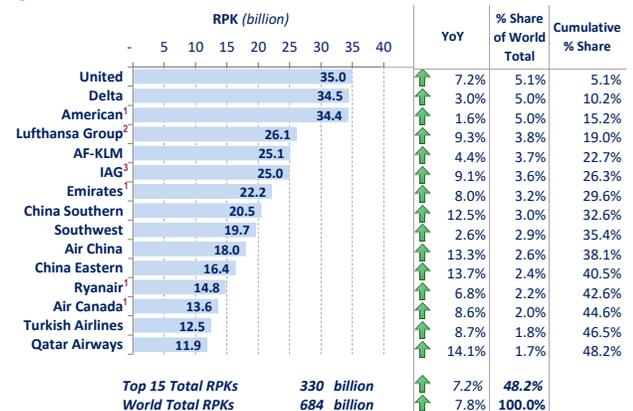
In terms of RPK, the Top 15 airline groups accounted for **48.2%** of world total RPK in June 2018, and grew by **+7.2%** YoY. This growth was **-0.6** percentage point lower than the world average on scheduled services. All the Top 15 airline groups posted YoY increases.

With a strong growth of **+7.2%**, **United** ranked **1st** for the first time of the year. **Delta** remained at **2nd** and grew moderately by **+3.0%**. **American**, continued to post the slowest growth among the Top 3 airlines and ranked 2 positions down to **3rd**. **Southwest** remained at **9th** with an increase of **+2.6%** YoY. **Air Canada** continued to record the strongest growth within the North American airlines in the Top 15, and improved 1 position to **13th**.

**Emirates** posted a recovery from the weak growth in the previous months and grew by **+8.0%** while remained at **7th**. **Qatar** recorded the strongest growth among the Top 15 and grew by **+14.1%**.

Three European airline groups, **Lufthansa**, **AF-KLM**, and **IAG** remained at **4th**, **5th**, and **6th**, respectively, and both Lufthansa and IAG grew strongly at above **+9.0%**. **Turkish Airlines** dropped 1 position to **14th** with a growth of **+8.7%**.

Major airlines in Asia/Pacific continued to grow robustly, with **China Southern**, **Air China** and **China Eastern** recording the fastest growth after Qatar, and ranked **8th**, **10th**, and **11th**, respectively.



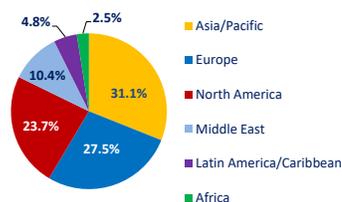
(Source: ICAO, airlines' websites)

Note: Total scheduled and non-scheduled services

### CAPACITY BY REGION (ICAO Statistical Regions)

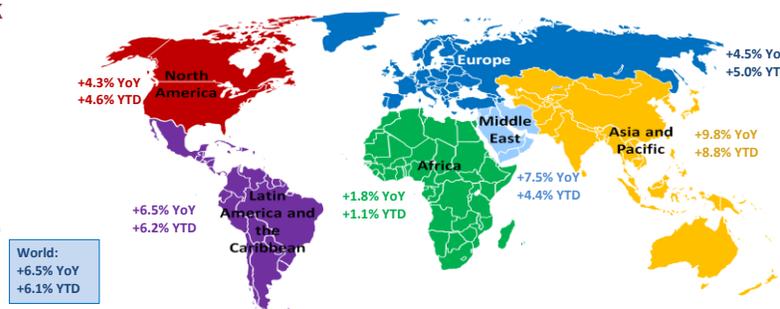
JUN 2018: +6.5% YoY in terms of World ASK

% Share of Capacity by Region



(Source: ICAO, IATA, OAG)

Note: Total scheduled services



Worldwide capacity expanded by **+6.5%** YoY in June 2018 with all regions posting capacity increase. Four regions, **Africa**, **Asia/Pacific**, **Latin America/Caribbean** and the **Middle East**, accelerated in capacity growth. The **Middle East** recorded the most significant improvement in capacity expansion and was the second fastest growing region after **Asia/Pacific**.

Both **Europe** and **North America** decelerated slightly in capacity increase.

\* Embarked Passengers \*\* Loaded and Unloaded Freight in Tonnes 1. ICAO estimates 2. Lufthansa Airlines, Eurowings, SWISS, Austrian Airlines, Brussels Airlines, Sun Express, and Lufthansa Cargo 3. British Airways, Iberia, and Vueling