



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

### GLOBAL KEY FIGURES

**SEP 2018**  
(versus SEP 2017)

**RPK** ▲ +5.5% **ASK** ▲ +5.8% **FTK** ▲ +2.0% **LF**: 81.4% ▼ -0.2 pt

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

**ASK** ▲ +6.1% \* Source OAG

### PASSENGER TRAFFIC

#### Revenue Passenger-Kilometres - RPK

World passenger traffic grew by +5.5% YoY in September 2018, -0.9 percentage point down from the growth in the previous month. This growth was the slowest in the last eight months, impacted by the flight disruptions due to the typhoon in Asia/Pacific and weaker performance in the Middle East. On the positive side, Latin America/Caribbean and North America recorded slight acceleration. India's domestic travel demand remained strong and recorded the fastest growth followed by China and the Russian Federation.



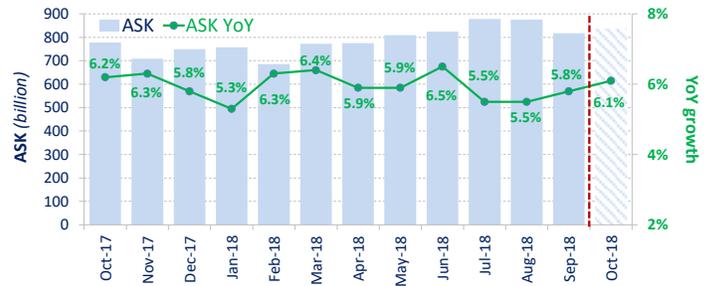
(Source: ICAO, IATA, OAG)

### CAPACITY

#### Available Seat-Kilometres - ASK

Capacity worldwide increased by +5.8% YoY in September 2018, +0.3 percentage point higher than the growth in the previous month (+5.5%).

In response to the passenger traffic demand, the expansion of capacity is expected to be at +6.1% in October 2018.



(Source: ICAO, IATA, OAG)

#### International Traffic vs. Tourist Arrivals

International passenger traffic grew by +4.9% YoY in September 2018, -0.7 percentage point lower than the growth in the previous month. The Performance by the region is similar to the total passenger traffic.

The growth of international tourist arrivals\* is expected to follow a similar monthly trend.



(Source: IATA, UNWTO)

\*UNWTO Definition

#### Load Factor - LF

The passenger Load Factor reached 81.4% in September 2018, -3.9 percentage points lower than the LF recorded in the previous month.

As capacity expansion outpaced the traffic growth, the September LF was -0.2 percentage point lower than the rate in the same period in 2017.



(Source: IATA)

### FREIGHT TRAFFIC

#### Freight Tonne-Kilometres - FTK

World freight traffic grew by +2.0% YoY in September 2018, -0.3 percentage point lower than the growth in the previous month. This slowdown reflects an overall weakening in world trade. The three largest regions of freight traffic, Asia/Pacific, Europe and North America, posted a deceleration with subdued growth of less than +2.0%, impacted by the recent trade tension. The Middle East recorded the highest growth among all regions, helped by improvements in the key markets to/from Europe and Asia. A slight improvement was also observed in Africa; however, the region remained as the only one with negative growth for the fifth consecutive month, reflecting weaker demand to/from the region.



(Source: IATA)

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

SEP 2018: +1.7%, +2.4%, and +1.0% YoY in terms of aircraft departures, passengers and freight for the Top 15

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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)	38,333	↑ 4.2%	Atlanta GA, US (ATL)	4,189,418	↑ 6.4%	Hong Kong, CN (HKG)	423,000	↓ -1.2%
Atlanta GA, US (ATL)	35,969	↑ 4.1%	Beijing, CN (PEK)	4,102,362	↓ -0.8%	Memphis TN, US (MEM)	373,042	↑ 4.5%
Los Angeles CA, US (LAX)	28,206	↑ 0.6%	Dubai, AE (DXB)	3,598,933	↓ -0.2%	Shanghai, CN (PVG)	312,624	↓ -4.2%
Dallas/Fort Worth TX, US (DFW)	26,736	↑ 0.6%	Chicago IL, US (ORD)	3,538,212	↑ 3.0%	Incheon, KR (ICN)	247,062	↓ -0.9%
Denver CO, US (DEN)	24,969	↑ 6.0%	London, GB (LHR)	3,491,731	↑ 0.8%	Anchorage AK, US (ANC)	227,142	↓ -3.4%
Beijing, CN (PEK)	24,671	↓ -4.7%	Tokyo, JP (HND)	3,446,867	↓ -3.2%	Dubai, AE (DXB)	221,213	↑ 1.9%
Frankfurt, DE (FRA)	22,975	↑ 5.7%	Los Angeles CA, US (LAX)	3,441,197	↑ 1.4%	Louisville KY, US (SDF)	198,828	↓ -3.3%
Amsterdam, NL (AMS)	22,893	↓ -0.2%	Frankfurt, DE (FRA)	3,312,379	↑ 6.4%	Taipei, CN (TPE)	196,975	↑ 0.7%
Charlotte NC, US (CLT)	22,536	↑ 2.8%	Paris, FR (CDG)	3,252,686	↑ 4.9%	Tokyo, JP (NRT)	192,972	↓ -2.6%
Paris, FR (CDG)	21,670	↑ 2.1%	Amsterdam, NL (AMS)	3,201,974	↑ 2.2%	Singapore, SG (SIN)	184,700	↑ 0.6%
Shanghai, CN (PVG)	20,718	↓ -0.3%	Istanbul, TR (IST)	3,064,381	↑ 1.1%	Beijing, CN (PEK)	183,908	↓ -1.2%
London, GB (LHR)	20,314	↓ -0.3%	Shanghai, CN (PVG)	3,005,808	↑ 3.6%	Doha, QA (DOH)	181,322	↑ 14.4%
Istanbul, TR (IST)	20,283	↓ -2.6%	New Delhi, IN (DEL)	2,820,579	↑ 10.7%	Los Angeles CA, US (LAX)	180,948	↑ 5.8%
Toronto ON, CA (YYZ)	20,230	↑ 0.2%	Hong Kong, CN (HKG)	2,786,500	↓ -0.2%	Frankfurt, DE (FRA)	175,295	↓ -1.2%
New Delhi, IN (DEL)	19,821	↑ 6.2%	Guangzhou, CN (CAN)	2,774,202	↑ 3.0%	Miami FL, US (MIA)	165,076	↑ 16.0%

Note: Total scheduled and non-scheduled services

(Source: ACI)

In terms of **aircraft departures**, the Top 15 airports reported a growth of **+1.7%** YoY. Ten out of the Top 15 airports posted YoY increases. The strongest growth in operations was recorded by **New Delhi** at **+6.2%**, owing to its strong domestic travel. **Beijing** and **Istanbul** posted a decline of **-4.7%** and **-2.6%**, respectively.

In terms of **passengers**, the Top 15 airports reported a growth of **+2.4%** YoY. Eleven out of the Top 15 airports posted YoY increases. **Tokyo** reported a significant decline at **-3.2%** due to the severe weather conditions. **New Delhi** recorded the fastest growth in passenger traffic by **+10.7%**, followed by **Atlanta** and **Frankfurt**, both at **+6.4%**.

In terms of **freight**, the top 15 airports reported a growth of **+1.0%**. Only seven out of the Top 15 reported a growth. The strongest growth was recorded by **Miami FL** at **+16.0%**, and **Doha** **+14.4%**. **Shanghai** posted the biggest decline of **-4.2%**, due to weaker conditions for manufacturing exporters in Asia/Pacific.

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

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SEP 2018: +6.0% YoY in terms of RPK for the Top 15

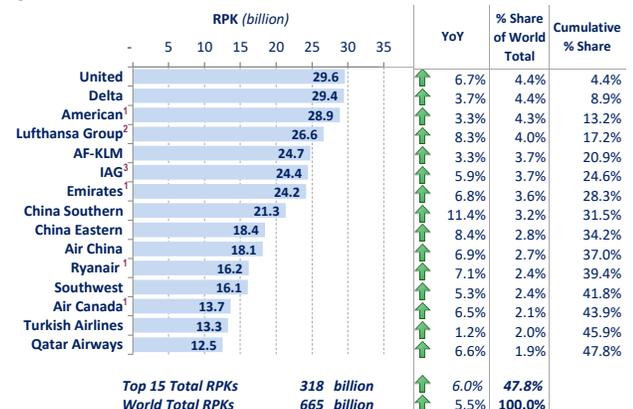
In terms of RPK, the Top 15 airline groups accounted for 47.8% of world total RPK in September 2018 and grew by **+6.0%** YoY. This growth was 0.5 percentage point higher than the world average on scheduled services. All the Top 15 airline groups posted YoY increases.

**United** ranked 1st with a strong growth of **+6.7%**, competing strongly with **Delta** which grew at **+3.7%** while dropping by 1 position to the 2nd. **American** remained at 3rd with a growth of **+3.3%**. **Southwest** dropped by 2 positions to 12th and was up by **+5.3%**. **Air Canada** held its position at 13th with a growth of **+6.5%**.

**Emirates** posted a growth of **6.8%** and remained 7th. **Qatar Airways** dropped by 1 position to 15th with a slowdown in growth at **+6.6%**.

**Lufthansa** posted a strong growth of **+8.3%** and remained at 4th, followed by **AF-KLM** and **IAG** with slightly slower growth of **+3.3%** and **5.9%**, respectively. **Turkish Airlines** ranked 1 position up to 14th albeit with the weakest growth among the Top 15 at **+1.2%**. **Ryanair** posted growth of **+7.1%** and ranked 1 position up to 11th.

Major airlines in **Asia/Pacific** continued to grow robustly, with **China Southern** recording the fastest growth by **+11.4%** and ranked 8th. **China Eastern** grew strongly by **+8.4%** and ranked 2 positions up to 9th. **Air China** grew by **+6.9%** and dropped by 1 position to 10th.



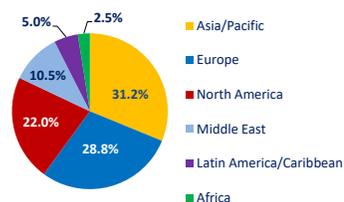
(Source: ICAO, airlines' websites)

Note: Total scheduled and non-scheduled services

### CAPACITY BY REGION (ICAO Statistical Regions)

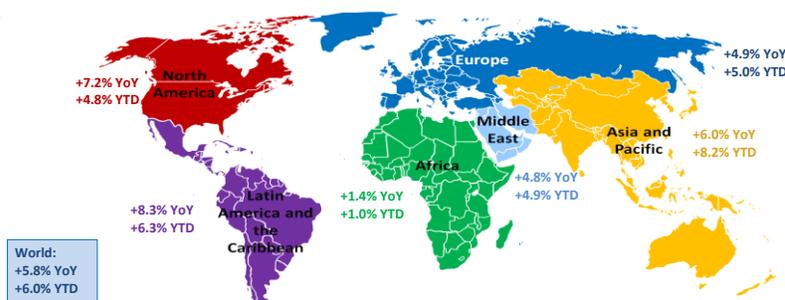
SEP 2018: +5.8% YoY in terms of World ASK

% Share of Capacity by Region



(Source: ICAO, IATA, OAG)

Note: Total scheduled services



Worldwide capacity expanded by **+5.8%** YoY in September 2018. **Latin America/Caribbean** posted the fastest expansion followed by **North America** and **Asia/Pacific**. The other regions, **Europe**, the **Middle East** and **Africa** posted slower growth compared to world average.

**Asia/Pacific** and the **Middle East** experienced a deceleration in capacity increase compared to the previous month.

\* 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