



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

### GLOBAL KEY FIGURES

**AUG 2018**  
(versus AUG 2017)

**RPK** ▲ +6.4%   **ASK** ▲ +5.5%   **FTK** ▲ +2.3%   **LF:** 85.3%   ▲ +0.8 pt

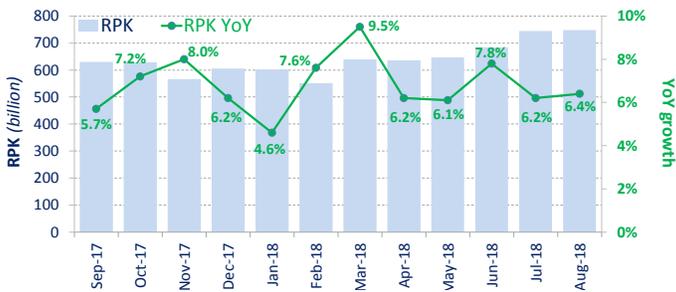
**OUTLOOK\* - SEP 2018**  
(versus SEP 2017)

**ASK** ▲ +5.8% \* Source OAG

### PASSENGER TRAFFIC

#### Revenue Passenger-Kilometres - RPK

World passenger traffic grew by +6.4% YoY in August 2018, +0.2 percentage points higher than the growth in the previous month. Global traffic growth responded to the peak period of passenger demand during the summer in the northern hemisphere. Europe posted the fastest growth rate, followed by the Middle East. A slowdown was observed in other regions. Albeit with the slowdown, Asia/Pacific recorded the fastest growth rate. India's domestic travel demand remained strong and recorded the quickest growth, followed by China and the Russian Federation.



(Source: ICAO, IATA, OAG)

### CAPACITY

#### Available Seat-Kilometres - ASK

Capacity worldwide increased by +5.5% YoY in August 2018, with no change compared to the growth in the previous month.

In response to the passenger traffic demand, the expansion of capacity is expected to be at +5.8% in September 2018.

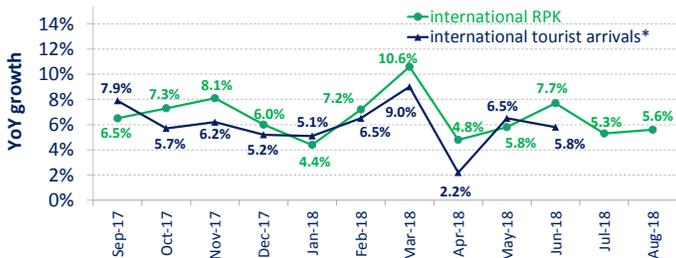


(Source: ICAO, IATA, OAG)

### International Traffic vs. Tourist Arrivals

International passenger traffic grew by +5.6% YoY in August 2018, +0.3 percentage points higher than the growth in the previous month. Similar to total passenger traffic, a mix of results were observed. Latin America/Caribbean experienced the most significant acceleration, followed by Europe and the Middle East. Africa and Asia/Pacific remained stable while North America posted a downward.

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



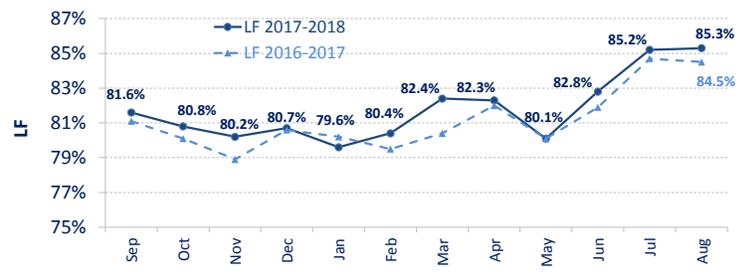
\*UNWTO Definition

(Source: IATA, UNWTO)

### Load Factor - LF

The passenger Load Factor reached 85.3% in August 2018, +0.1 percentage point higher than the LF recorded in the previous month. It has been the highest LF recorded in the last twelve months.

As traffic growth outpaced the capacity expansion, the August LF was +0.8 percentage point higher than the rate in the same period in 2017.

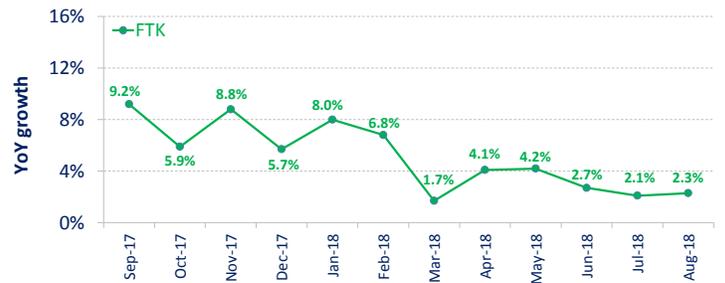


(Source: IATA)

### FREIGHT TRAFFIC

#### Freight Tonne-Kilometres - FTK

World freight traffic grew by +2.3% YoY in August 2018, +0.2 percentage points higher than the growth in the previous month. Europe recorded the fastest growth, followed by Asia/Pacific and North America. This performance was driven by improving economic conditions in the United States and the transatlantic market. The Middle East and Latin America/Caribbean recorded a slowdown. The slowdown in the Latin America/Caribbean region was due to the deceleration of the intra-regional market, as well as the decrease in the international traffic in Brazil and Mexico. For the fourth consecutive month, Africa was the only region with a negative growth, 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)

AUG 2018: +2.0%, +3.6%, and +1.6% YoY in terms of aircraft departures, passengers and freight for the Top 15

AUG 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)	41,699	↑ 4.1%	Atlanta GA, US (ATL)	4,836,181	↑ 4.2%	Hong Kong, CN (HKG)	423,000	↑ 2.7%
Atlanta GA, US (ATL)	40,378	↑ 3.0%	Beijing, CN (PEK)	4,522,832	↑ 9.6%	Memphis TN, US (MEM)	391,274	↑ 4.3%
Los Angeles CA, US (LAX)	31,569	↑ 1.7%	Dubai, AE (DXB)	4,188,239	↑ 1.7%	Shanghai, CN (PVG)	308,356	↑ 0.2%
Dallas/Fort Worth TX, US (DFW)	30,040	↑ 3.3%	Los Angeles CA, US (LAX)	4,068,705	↑ 2.6%	Anchorage AK, US (ANC)	250,724	↑ 7.2%
Denver CO, US (DEN)	27,242	↑ 2.9%	Chicago IL, US (ORD)	3,991,000	↑ 4.3%	Incheon, KR (ICN)	234,815	↑ 1.8%
Beijing, CN (PEK)	26,171	↑ 3.7%	Tokyo, JP (HND)	3,976,469	↓ -3.9%	Dubai, AE (DXB)	219,629	↓ -2.3%
Charlotte NC, US (CLT)	24,318	↓ -0.4%	London, GB (LHR)	3,837,014	↑ 2.6%	Louisville KY, US (SDF)	213,711	↓ -1.5%
Amsterdam, NL (AMS)	23,548	↓ -2.4%	Paris, FR (CDG)	3,581,674	↑ 4.5%	Taipei, CN (TPE)	196,699	↑ 1.2%
Las Vegas NV, US (LAS)	23,513	↑ 4.6%	Amsterdam, NL (AMS)	3,422,126	↑ 0.7%	Los Angeles CA, US (LAX)	187,522	↑ 5.2%
Frankfurt, DE (FRA)	23,195	↑ 8.1%	Hong Kong, CN (HKG)	3,413,000	↑ 5.1%	Singapore, SG (SIN)	183,800	↑ 1.8%
Paris, FR (CDG)	22,917	↑ 2.4%	Frankfurt, DE (FRA)	3,399,028	↑ 8.1%	Doha, QA (DOH)	175,585	↑ 6.6%
Toronto ON, CA (YYZ)	21,880	↑ 1.1%	Istanbul, TR (IST)	3,340,403	↑ 0.6%	Beijing, CN (PEK)	175,213	↑ 3.7%
Istanbul, TR (IST)	21,453	↓ -2.5%	Shanghai, CN (PVG)	3,322,680	↑ 5.7%	Frankfurt, DE (FRA)	173,427	↑ 1.0%
San Francisco CA, US (SFO)	21,288	↓ -1.9%	Dallas/Fort Worth TX, US (DFW)	3,120,332	↑ 3.9%	Chicago IL, US (ORD)	172,094	↓ -0.1%
Shanghai, CN (PVG)	21,199	↑ 0.1%	Guangzhou, CN (CAN)	3,091,841	↑ 7.0%	Tokyo, JP (NRT)	170,058	↓ -10.3%

Note: Total scheduled and non-scheduled services

In terms of **aircraft departures**, the Top 15 airports reported a growth of **+2.0%** YoY. Eleven out of the Top 15 airports posted YoY increases. The strongest growth in operations was recorded by **Frankfurt** at **+8.1%**, owing to the positive performance in the European routes. **Istanbul** and **Amsterdam** posted the largest decline of **-2.5%** and **-2.4%**, respectively.

In terms of **passengers**, the Top 15 airports reported a growth of **+3.6%** YoY. Fourteen out of the Top 15 airports posted YoY increases, except for **Tokyo** with a decline of **-3.9%**, due to the flight disruption caused by the typhoon Shanshan. **Atlanta** retained the 1st position with a growth of **+4.2%**. **Beijing** recorded the fastest growth in passenger traffic by **+9.6%**, followed by **Frankfurt** (**+8.1%**).

In terms of **freight**, the Top 15 airports reported a growth of **+1.6%**. Eleven out of the Top 15 posted a YoY increases. The strongest growth was recorded by **Anchorage** (**+7.2%**) and **Doha** (**+6.6%**). **Tokyo** experienced the biggest decline of **-10.3%** due to weaker conditions for manufacturing exporters in Asia/Pacific, a drop in the international transit cargo and the meteorological impacts.

(Source: ACI)

## TOP 15 AIRLINE GROUPS (Ranked by RPK)

AUG 18

AUG 2018: +6.1% YoY in terms of RPK for the Top 15

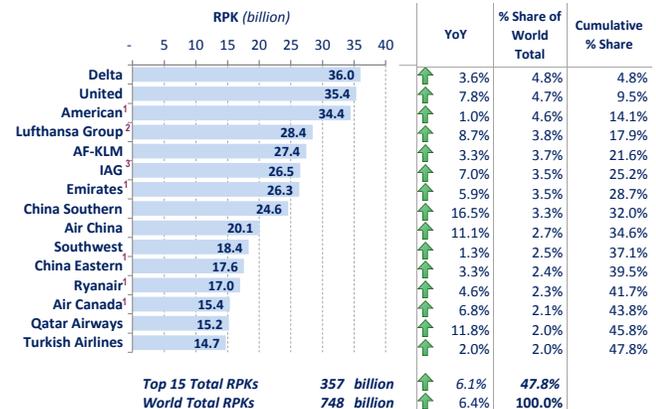
In terms of RPK, the Top 15 airline groups accounted for **47.8%** of world total RPK in August 2018, and grew by **+6.1%** YoY. This growth was **-0.3** percentage point lower than the world average on scheduled services. All the Top 15 airline groups posted YoY increases.

**Delta** ranked in **1st** place for the second time during the year with a growth of **+3.6%**. This was followed by **United** at **2nd** and grew at **+7.8%**. **American** ranked at **3rd** with a modest growth of **+1.0%**. **Southwest** dropped at **10th** and was up **+1.3%** YoY. **Air Canada** ranked 2 positions up to **13th** with an increase of **+6.8%** YoY.

**Emirates** dropped 1 position to **7th** with a growth of **+5.9%**. **Qatar** recorded the second strongest growth among the Top 15 by **+11.8%**, but dropped 1 position down to **14th**.

**Lufthansa** remained at **4th** and rose by **+8.7%** YoY. **AF-KLM** posted a growth of **+3.3%** and remained at **5th**. **IAG** improved 1 position to **6th**. **Turkish Airlines** posted a modest growth rate of **+2.0%** and ranked at **15th**. **Ryanair** grew **+4.6%** and remained at **12th**.

Major airlines in Asia/Pacific continued to grow robustly, with **China Southern** recording the fastest growth by **+16.5%**, and remained ranked at **8th**. **Air China** grew by **+11.1%** and improved 1 position up to **9th**. **China Eastern** grew modestly at **+3.3%** and ranked at **11th**, this being the same as the previous month.



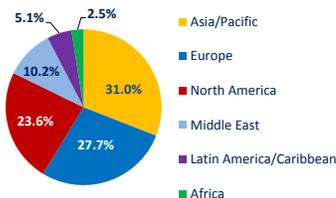
(Source: ICAO, airlines' websites)

Note: Total scheduled and non-scheduled services

## CAPACITY BY REGION (ICAO Statistical Regions)

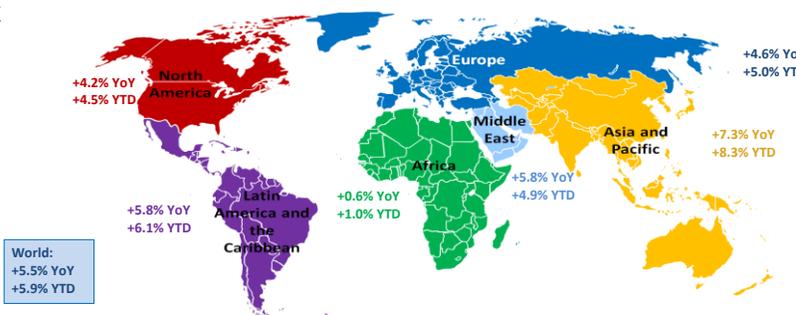
AUG 2018: +5.5% YoY in terms of World ASK

% Share of Capacity by Region



(Source: ICAO, IATA, OAG)

Note: Total scheduled services



Worldwide capacity expanded by **+5.5%** YoY in August 2018. **North America** and **Europe** posted growth, compared to the previous month. The rest of the regions experienced a deceleration in the capacity increase. **Asia/Pacific**, **Latin America/Caribbean** and the **Middle East** recorded a faster growth than the world average. **Africa** slowed slightly the pace during the 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, Aer Lingus, Iberia, and Vueling