



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

GLOBAL KEY FIGURES

JUN 2020
(versus JUN 2019)

RPK ▼ -86.5% **ASK** ▼ -80.1% **FTK** ▼ -17.6% **LF:** 57.6% ▲ +6.9 pt

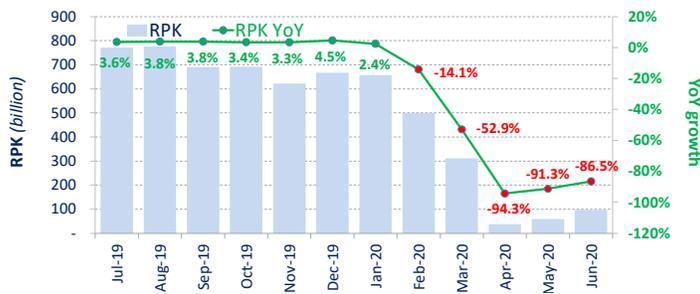
OUTLOOK* - JUL 2020
(versus JUL 2019)

ASK ▼ -66.1% * Source OAG

PASSENGER TRAFFIC

Revenue Passenger-Kilometres - RPK

World passenger traffic fell by -86.5% YoY in June 2020, +4.8 percentage points up from the decline in the previous month. Air travel continued to show recovery from the trough in April, albeit with modest improvements. More countries started to relax lockdowns and travel restrictions, however limited to domestic open up. Consequently, the small upturn was mostly driven by domestic traffic. Speed of recovery varies across regions, with Asia/Pacific showing the most resilient rebound supported by the restart of key domestic markets, especially China.



(Source: ICAO, IATA, OAG)

CAPACITY

Available Seat-Kilometres - ASK

Capacity worldwide fell by -80.1% YoY in June 2020, +5.9 percentage points up from the decline in the previous month (-86.0%).

With gradual opening of markets and rise in demand for domestic travel as well as the signs of pickup in international travel, world capacity is expected to increase in July to -66.1% down YoY.

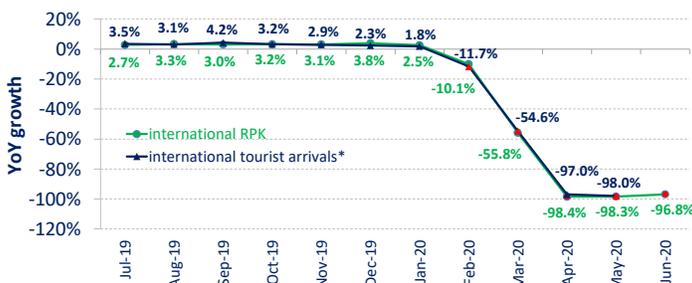


(Source: ICAO, IATA, OAG)

International Traffic vs. Tourist Arrivals

International passenger traffic fell by -96.8% YoY in June 2020, +1.6 percentage points up from the decline in the previous month. International air travel remained to be tightly restricted and was virtually shutdown amid the strict border closures and quarantine enforcements broadly.

The international tourist arrivals remained at halt and is expected to follow a similar trend as international passenger traffic.



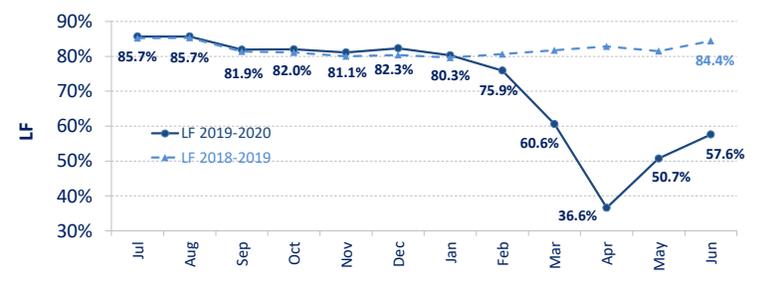
(Source: IATA, UNWTO)

*UNWTO Definition

Load Factor - LF

The passenger Load Factor reached 57.6% in June 2020, +6.9 percentage points higher than the previous month.

As decline in traffic was faster than capacity reduction, the June LF was -26.8 percentage points lower than the rate in the same period of 2019.

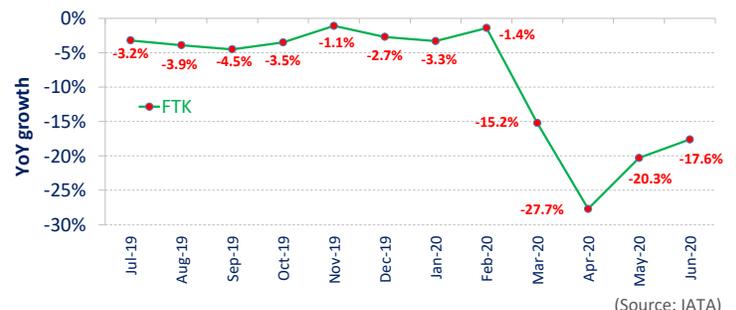


(Source: IATA)

FREIGHT TRAFFIC

Freight Tonne-Kilometres - FTK

World freight traffic reported a decline of -17.6% YoY in June 2020, +2.7 percentage points up from the fall in the previous month. Improvements in air cargo demand continued into June, however, the pace of rebound unwound compared to May. The primary driver for sustaining air cargo resilience amid the most strict global lockdowns, i.e. urgent need of speedy transportation of medical supplies and PPE, has softened alongside the easing of wide-scale shortage. More demand including those of consumption goods began to shift to slower but cheaper means of transportation such as shipping by sea or rail. The performance of recovery by region was a mixed with slight upturn in North America, Europe and the Middle East, while deterioration in Asia/Pacific, Africa and Latin America/Caribbean.



(Source: IATA)

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

JUN 2020: -41.4%, -57.3%, and +1.8% YoY in terms of aircraft departures, passengers and freight for the Top 15

JUN 20

Airports (ranking by number of departures)	Departures	YoY	Airports (ranking by number of passengers)	Passengers*	YoY	Airports (ranking by tonnes of freight)	Freight**	YoY
Phoenix AZ, US (DVT)	16,021	↓ -15.1%	Chengdu, CN (CTU)	1,618,588	↓ -27.3%	Memphis TN, US (MEM)	393,994	↑ 13.3%
Dallas/Fort Worth TX, US (DFW)	15,226	↓ -50.4%	Guangzhou, CN (CAN)	1,552,025	↓ -46.0%	Hong Kong SAR, CN (HKG)	354,000	↓ -6.6%
Guangzhou, CN (CAN)	14,595	↓ -25.7%	Shenzhen, CN (SZX)	1,479,063	↓ -28.5%	Shanghai, CN (PVG)	302,642	↑ 3.5%
Shenzhen, CN (SZX)	13,670	↓ -6.5%	Xi'an, CN (XIY)	1,310,400	↓ -31.7%	Anchorage AK, US (ANC)	280,870	↑ 17.9%
Chengdu, CN (CTU)	13,482	↓ -9.8%	Shanghai, CN (SHA)	1,212,542	↓ -35.2%	Louisville KY, US (SDF)	234,357	↑ 6.0%
Shanghai, CN (PVG)	12,374	↓ -41.9%	Hangzhou, CN (HGH)	1,136,183	↓ -30.6%	Incheon, KR (ICN)	209,542	↓ -4.9%
Denver CO, US (DEN)	12,288	↓ -55.8%	Dallas/Fort Worth TX, US (DFW)	1,106,722	↓ -67.6%	Taipei, CN (TPE)	183,054	↑ 5.6%
Atlanta GA, US (ATL)	12,229	↓ -68.8%	Shanghai, CN (PVG)	960,057	↓ -70.4%	Los Angeles CA, US (LAX)	182,376	↑ 9.7%
Chicago IL, US (ORD)	12,184	↓ -69.8%	Jeju, KR (CJU)	892,808	↓ -33.5%	Miami FL, US (MIA)	166,441	↓ -1.5%
Long Beach CA, US (LGB)	11,480	↓ -16.5%	Denver CO, US (DEN)	875,184	↓ -72.6%	Chicago IL, US (ORD)	157,229	↑ 3.6%
Charlotte NC, US (CLT)	11,395	↓ -52.7%	Atlanta GA, US (ATL)	791,750	↓ -84.1%	Doha, QA (DOH)	154,429	↓ -10.9%
Anchorage AK, US (ANC)	11,356	↓ -29.9%	Charlotte NC, US (CLT)	784,213	↓ -63.7%	Cincinnati OH, USA (CVG)	145,163	↑ 60.6%
Xi'an, CN (XIY)	11,152	↓ -20.8%	Beijing, CN (PEK)	752,902	↓ -81.4%	Guangzhou, CN (CAN)	144,960	↑ 1.2%
Phoenix AZ, US (AZA)	10,080	↓ -21.3%	Nanjing, CN (NKG)	744,733	↓ -40.6%	Tokyo, JP (NRT)	140,640	↓ -19.2%
Hangzhou, CN (HGH)	9,939	↓ -16.2%	Seoul, KR (GMP)	722,242	↓ -33.6%	Dubai, AE (DXB)	139,962	↓ -27.2%

Note: Total scheduled and non-scheduled services

(Source: ACI)

In terms of **aircraft departures**, all the Top 15 airports reported declines with a combined fall of **-41.4%** YoY. The Top 15 list comprised of only US and Chinese airports with **Phoenix (Deer Valley)** continuing to be **1st**. **Chicago** recorded the most significant decline of **-69.8%**, followed by **Atlanta**. Two Chinese airports posted the smallest declines with less than **-10%** YoY.

In terms of **passengers**, the Top 15 airports posted a staggering fall of **-57.3%** YoY. Eleven out of the Top 15 airports were in Asia/Pacific and mostly in China, owing to the gradual pickup of domestic traffic. **Chengdu** remained **1st** with the smallest contraction of **-27.3%**, followed by **Guangzhou**. Beside Chinese airports, two Korean and US airports also ranked within the Top 15.

In terms of **freight**, the Top 15 airports reported a YoY increase of **+1.8%**. This was the first positive growth since March. Over half of the Top 15 posted YoY increase with the strongest growth being recorded by **Cincinnati (+60.6%)**, owing to a surge in cargo loads into the DHL system. **Memphis** remained at **1st**, followed by **Hong Kong** with a fall of **-6.6%**.

TOP 15 AIRLINE GROUPS (Ranked by RPK)

JUN 2020: -77.7% YoY in terms of RPK for the Top 15

In terms of RPK, the Top 15 airline groups accounted for **58.0%** of the world's total RPK in June 2020 and declined by **-77.7%** YoY. This decline was 8.8 percentage points less than the world's average on scheduled services, with contraction in traffic of all airlines in the Top 15. **Ranking of the Top 15 airlines continued to be distorted due to the different recovery pace by region and country, nonetheless the same airlines as in May maintained in the list.**

Chinese airlines dominated the chart supported by the sturdy recovery of domestic traffic in the country. **China Southern, Air China, and China Eastern** remained the **Top 3** with traffic down ranging from **-53%** to **-65%** YoY. **Hainan Airlines, Spring Airlines, Shandong Airlines and Junyao Airlines** ranked at similar positions as the previous month at **5th, 9th, 11th, 12th and 13th**, respectively. **Spring Airlines** has recorded the fastest improvement with traffic rebounded to **73.7%** of the 2019 level.

Among the US airlines in the Top 15, **American and Southwest** recovered slightly faster although the improvements were still modest, and ranked **4th and 6th**, respectively. While traffic level of **Delta and United** remained relatively unchanged compared to May. **Alaska Airlines** maintained the position of **15th**.

Performance of airlines in Europe stayed subdued. **Aeroflot** registered a faster recovery due to resumption of domestic flights, and ranked up to **8th**. **AF-KLM** further moved down to **14th** with marginal improvements.

JUN 20

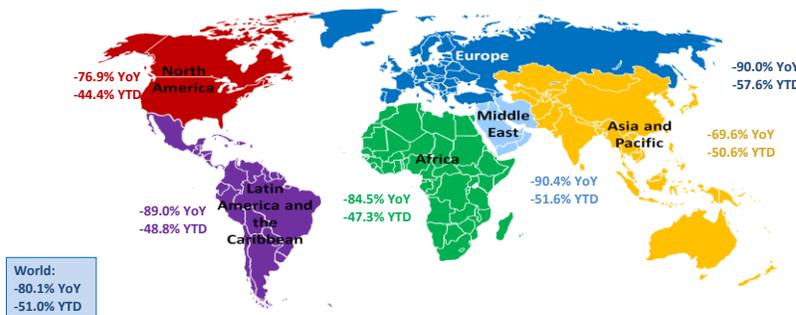
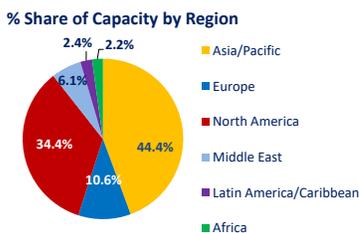
	RPK (billion)	YoY	% Share of World Total	Cumulative % Share
China Southern	10.6	↓ -53.3%	11.0%	11.0%
China Eastern	7.0	↓ -61.5%	7.2%	18.2%
Air China	6.6	↓ -64.7%	6.8%	25.0%
American	6.3	↓ -80.3%	6.5%	31.5%
Hainan Airlines	4.3	↓ -65.1%	4.5%	36.0%
Southwest	3.7	↓ -80.2%	3.8%	39.8%
Delta	2.8	↓ -92.3%	2.9%	42.7%
Aeroflot	2.4	↓ -83.6%	2.5%	45.2%
Spring Airlines	2.4	↓ -26.3%	2.5%	47.6%
United	2.1	↓ -93.6%	2.1%	49.8%
Sichuan Airlines	1.9	↓ -50.5%	2.0%	51.8%
Shandong Airlines	1.7	↓ -30.0%	1.7%	53.5%
Junyao Airlines	1.6	↓ -42.9%	1.7%	55.1%
AF-KLM	1.4	↓ -94.6%	1.5%	56.6%
Alaska Airlines	1.3	↓ -80.2%	1.4%	58.0%
Top 15 Total RPKs	56 billion	↓ -77.7%	58.0%	
World Total RPKs	97 billion	↓ -86.5%	100.0%	

(Source: ICAO, airlines' websites)

Note: Total scheduled and non-scheduled services

CAPACITY BY REGION (ICAO Statistical Regions)

JUN 2020: -80.1% YoY in terms of World ASK



Worldwide capacity contracted by -80.1% YoY in June 2020. As more flights being resumed compared to May, capacity decline of all regions eased slightly with the exception of Africa.

The most resilient recovery was recorded by Asia/Pacific with capacity returned to 30% of the 2019 level. The slowest improvements were observed in Europe and the Middle East.

(Source: ICAO, IATA, OAG)

Note: Total scheduled services

* Embarked Passengers ** Loaded and Unloaded Freight in Tonnes 1. ICAO estimates

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.