



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

GLOBAL KEY FIGURES

SEP 2020
(versus SEP 2019)

RPK ▼ -72.8% **ASK** ▼ -63.0% **FTK** ▼ -8.0% **LF:** 60.1% ▲ +1.6 pt

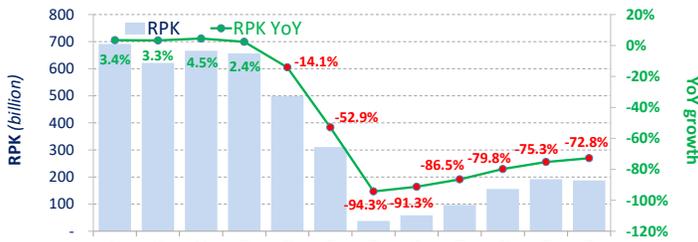
OUTLOOK* - OCT 2020
(versus OCT 2019)

ASK ▼ -63.0% * Source OAG

PASSENGER TRAFFIC

Revenue Passenger-Kilometres - RPK

World passenger traffic fell by -72.8% YoY in September 2020, +2.5 percentage points up from the decline in the previous month. All regions posted improvements except in Europe which was suppressed by the tightened travel restrictions due to the resurgence of outbreaks in the region. Asia/Pacific continued to lead the pace of recovery while Latin America/Caribbean also gained momentum from the domestic travel in Brazil. Among the major domestic markets, growth in Russian Federation remained positive, and the demand increase in China has been sharp.



(Source: ICAO, IATA, OAG)

International Traffic vs. Tourist Arrivals

International passenger traffic fell by -88.8% YoY in September 2020, -0.5 percentage point down from the decline in the previous month. International travel further weakened, as the main driver for international traffic recovery - Intra Europe travel demand - has softened amid the re-imposed lockdowns.

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



*UNWTO Definition

(Source: IATA, UNWTO)

FREIGHT TRAFFIC

Freight Tonne-Kilometres - FTK

World freight traffic reported a decline of -8.0% YoY in September 2020, +4.6 percentage points up from the fall in the previous month. Air cargo showed an expedited recovery with solid improvements in all regions. Africa and North America, in particular, have returned back to pre-pandemic levels and achieved a robust positive YoY growth of over +8%, outperforming other regions. The uptick was supported by the rebound in consumer spending on goods and services after the gradual economic re-opening. The Middle East was also resilient, closely approaching the 2019 level, while recovery in other regions was slower with Latin America/Caribbean showing the steepest YoY decline of over -20%.

CAPACITY

Available Seat-Kilometres - ASK

Capacity worldwide fell by -63.0% YoY in September 2020, +0.8 percentage point up from the decline in the previous month (-63.8%).

As some regions may see capacity cut in response to the stricter measures, overall fall of world capacity in October is expected to be unchanged.

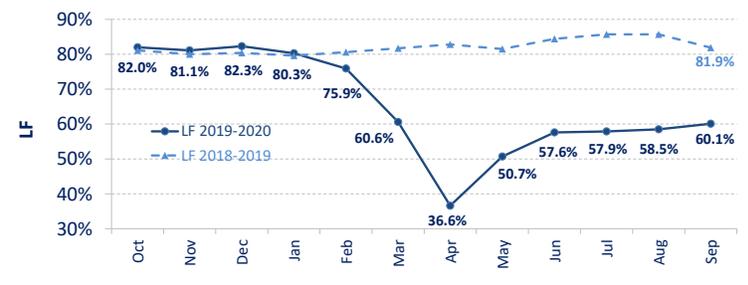


(Source: ICAO, IATA, OAG)

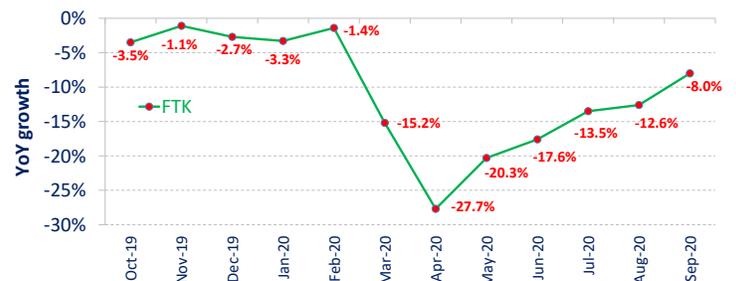
Load Factor - LF

The passenger Load Factor reached 60.1% in September 2020, +1.6 percentage points higher than the previous month.

The fall in travel demand was deeper than the capacity cut, as a result, the September LF was -21.8 percentage points lower than the rate in the same period of 2019.



(Source: IATA)



(Source: IATA)

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

SEP 2020: -24.5%, -37.0%, and +6.9% YoY in terms of aircraft departures, passengers and freight for the Top 15

SEP 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
Atlanta GA, US (ATL)	22,123	↓ -39.0%	Guangzhou, CN (CAN)	2,308,170	↓ -23.3%	Memphis TN, US (MEM)	387,737	↑ 17.5%
Chicago IL, US (ORD)	21,880	↓ -44.1%	Chengdu, CN (CTU)	2,282,135	↑ 0.6%	Hong Kong SAR, CN (HKG)	384,000	↓ -3.3%
Dallas/Fort Worth TX, US (DFW)	20,705	↓ -32.5%	Beijing, CN (PEK)	1,985,079	↓ -51.2%	Shanghai, CN (PVG)	319,462	↑ 2.1%
Guangzhou, CN (CAN)	18,021	↓ -12.0%	Shenzhen, CN (SZX)	1,964,196	↓ -9.5%	Anchorage AK, US (ANC)	291,186	↑ 27.6%
Denver CO, US (DEN)	17,715	↓ -35.4%	Shanghai, CN (PVG)	1,813,270	↓ -41.1%	Incheon, KR (ICN)	244,730	↑ 10.1%
Shanghai, CN (PVG)	16,912	↓ -20.1%	Xi'an, CN (XIY)	1,804,245	↓ -9.5%	Louisville KY, US (SDF)	241,883	↑ 16.1%
Charlotte NC, US (CLT)	16,127	↓ -32.9%	Shanghai, CN (SHA)	1,793,488	↓ -4.3%	Taipei, CN (TPE)	210,103	↑ 14.3%
Chengdu, CN (CTU)	15,599	↑ 2.9%	Kunming, CN (KMG)	1,790,713	↓ -7.8%	Los Angeles CA, US (LAX)	194,054	↑ 21.6%
Shenzhen, CN (SZX)	15,451	↑ 1.3%	Dallas/Fort Worth TX, US (DFW)	1,696,340	↓ -44.8%	Doha, QA (DOH)	188,362	↑ 4.4%
Beijing, CN (PEK)	14,773	↓ -40.4%	Hangzhou, CN (HGH)	1,581,494	↓ -6.5%	Miami FL, US (MIA)	188,339	↑ 18.8%
Phoenix AZ, US (DVT)	14,082	↓ -21.9%	Atlanta GA, US (ATL)	1,562,116	↓ -64.2%	Dubai, AE (DXB)	174,618	↓ -15.4%
Kunming, CN (KMG)	14,073	↓ -2.1%	Denver CO, US (DEN)	1,450,959	↓ -51.3%	Tokyo, JP (NRT)	162,704	↓ -8.0%
Xi'an, CN (XIY)	13,655	↓ -6.1%	Charlotte NC, US (CLT)	1,179,388	↓ -41.3%	Guangzhou, CN (CAN)	158,738	↓ -2.5%
Long Beach CA, US (LGB)	13,293	↓ -0.6%	Chicago IL, US (ORD)	1,165,818	↓ -67.1%	Frankfurt, DE (FRA)	157,923	↓ -4.1%
Phoenix AZ, US (AZA)	13,229	↑ 0.6%	Antalya, TR (AYT)	1,126,313	↓ -53.5%	Chicago IL, US (ORD)	157,195	↑ 8.1%

Note: Total scheduled and non-scheduled services

(Source: ACI)

In terms of **aircraft departures**, the Top 15 airports reported a combined fall of **-24.5%** YoY. For the first time since the pandemic, a few airports posted positive growth, i.e. **Chengdu (+2.9%)**, **Shenzhen (+1.3%)** and **Phoenix (+0.6%)**. The Top 15 list comprised of US and Chinese airports. **Atlanta** retained the **1st** position, followed by **Chicago** and **Dallas/Fort Worth**.

In terms of **passengers**, the Top 15 airports posted a total fall of **-37.0%** YoY. Similar to departures, YoY increase re-emerged in the list since March, albeit only in one airport, **Chengdu (+0.6%)**. Nine out of the Top 15 airports were Chinese airports, most of which also recorded smaller YoY declines. In addition, five US airports and one Turkish airport ranked within the Top 15.

In terms of **freight**, the Top 15 airports reported a YoY increase of **+6.9%**, indicating four consecutive monthly growth since June. Ten out of the Top 15 posted YoY increase with seven growing double-digitally. **Anchorage** and **Los Angeles** recorded the strongest growth at **+27.6%** and **+21.6%**, respectively. **Memphis** remained **1st** with an increase of **+17.5%**.

TOP 15 AIRLINE GROUPS (Ranked by RPK)

SEP 2020: -60.6% YoY in terms of RPK for the Top 15

SEP 20

In terms of RPK, the Top 15 airline groups accounted for **63.7%** of the world's total RPK in September 2020 and declined by **-60.6%** YoY. This decline was 12.2 percentage points smaller than the fall in world's average RPK, with all airlines in the Top 15 posting contractions.

The distortion in Top 15 rankings reflects the uneven recovery across the globe. Countries with bigger domestic market have demonstrated more resilience.

Owing to the steady increase in domestic demand, Chinese airlines, **China Southern**, **Hainan Airlines**, **China Eastern** and **Air China** ranked Top 4, with traffic being recovered to over 60% of the 2019 level. Noticeable improvement was recorded by **Hainan Airlines** which climbed up 9 positions and made it to **2nd** for the first time. **Spring Airlines** kept the **15th** place, and recorded the fastest recovery with traffic returning to 96.0% of the 2019 level.

Recovery of US airlines has been modest. **American** stayed at **5th** while **Southwest** went down to **10th** surpassed by few other major airlines. **Delta** and **United** improved to **6th** and **7th**, respectively, posting gradual improvements.

After a short-lived summer recovery, the upward trend in European airlines stalled due to the new lockdown restrictions introduced in reaction to the second wave in the region. Except for **Aeroflot** which recovered to almost 50% of the 2019 level, the other airlines remained weak at below 70%.

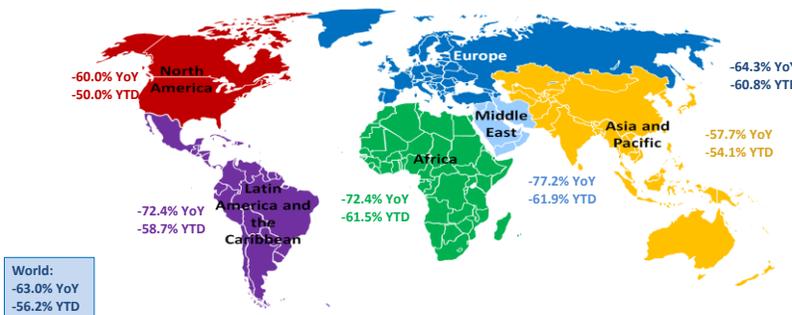
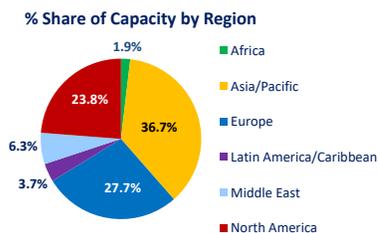
Airline	RPK (billion)				YoY	% Share of World Total	Cumulative % Share
	5	10	15	20			
China Southern			17.1		↓ -27.5%	9.1%	9.1%
Hainan Airlines		12.5			↓ -10.5%	6.6%	15.8%
China Eastern		12.2			↓ -32.2%	6.5%	22.3%
Air China		11.7			↓ -38.7%	6.2%	28.5%
American	9.3				↓ -66.3%	5.0%	33.5%
Delta	8.4				↓ -73.5%	4.5%	37.9%
United	7.7				↓ -71.6%	4.1%	42.0%
Aeroflot	7.1				↓ -51.2%	3.8%	45.8%
AF-KLM	7.0				↓ -72.6%	3.7%	49.5%
Southwest	6.2				↓ -61.3%	3.3%	52.8%
Lufthansa Group	4.8				↓ -82.5%	2.5%	55.4%
Ryanair	4.3				↓ -76.0%	2.3%	57.6%
IAG	4.2				↓ -82.8%	2.3%	59.9%
Turkish Airlines	4.0				↓ -71.0%	2.1%	62.0%
Spring Airlines	3.2				↓ -4.0%	1.7%	63.7%
Top 15 Total RPKs	120 billion				↓ -60.6%	63.7%	
World Total RPKs	188 billion				↓ -72.8%	100.0%	

(Source: ICAO, airlines' websites)

Note: Total scheduled and non-scheduled services

CAPACITY BY REGION (ICAO Statistical Regions)

SEP 2020: -63.0% YoY in terms of World ASK



Worldwide capacity contracted by

-63.0% YoY in September 2020.

Although this indicated a smaller fall compared to the previous month, improvements eased in two regions, i.e. Europe and North America, with more airlines further cutting capacity.

The biggest increase was observed in Latin America/Caribbean while Asia/Pacific showed the smallest YoY capacity decline.

(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.