



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

GLOBAL KEY FIGURES

AUG 2020

(versus AUG 2019)

RPK ▼ -75.3% ASK ▼ -63.8% FTK ▼ -12.6% LF: 58.5% ▲ +0.6 pt

OUTLOOK* - SEP 2020

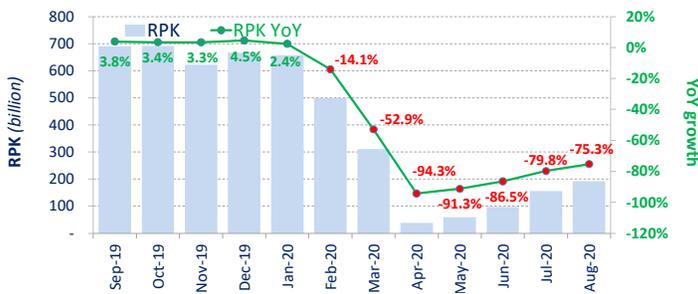
(versus SEP 2019)

ASK ▼ -60.7% * Source OAG

PASSENGER TRAFFIC

Revenue Passenger-Kilometres - RPK

World passenger traffic fell by -75.3% YoY in August 2020, +4.5 percentage points up from the decline in the previous month. Air travel demand in all regions improved modestly with Asia/Pacific showing the fastest recovery while the Middle East being the weakest performer due to the sluggish international traffic. Domestic travel remained as the main contributor to recovery globally with significant improvements in major markets, particularly China and Russia Federation; the latter also became the first to rebound back to pre-pandemic level.



(Source: ICAO, IATA, OAG)

CAPACITY

Available Seat-Kilometres - ASK

Capacity worldwide fell by -63.8% YoY in August 2020, +6.3 percentage points up from the decline in the previous month (-70.1%).

Contraction in world capacity is expected to ease in September to -60.7% down YoY, as airlines continue to resume more operations.



(Source: ICAO, IATA, OAG)

International Traffic vs. Tourist Arrivals

International passenger traffic fell by -88.3% YoY in August 2020, +3.6 percentage points up from the decline in the previous month. International air travel demand globally remained severely curtailed at less than 10% of the 2019 level, except for Europe which showed increases in intra-regional travel and recovered to around 20%.

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



*UNWTO Definition

(Source: IATA, UNWTO)

Load Factor - LF

The passenger Load Factor reached 58.5% in August 2020, +0.6 percentage point higher than the previous month.

As recovery in air travel demand was still slower than capacity rebound, the August LF was -27.2 percentage points lower than the rate in the same period of 2019.

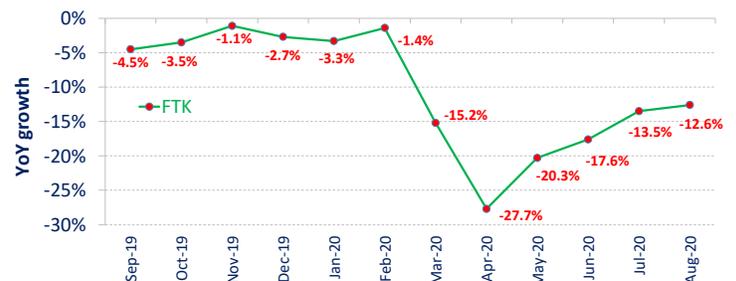


(Source: IATA)

FREIGHT TRAFFIC

Freight Tonne-Kilometres - FTK

World freight traffic reported a decline of -12.6% YoY in August 2020, +0.9 percentage point up from the fall in the previous month. For the first time since May, all regions posted improvements in air cargo recovery; however, the overall upward trend has eased slightly due to the slowdown in certain major markets. Pace of recovery by region differs at varying degrees, with Africa continued to demonstrate more resilience with stronger demand and became the only region recording positive growth. Significant upswing was seen in the Middle East while the recovery stalled in Asia/Pacific. Economic activities are expected to recover with stabilizing industrial production and export orders, which will support the recovery in air cargo demand in the coming months.



(Source: IATA)

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

AUG 2020: -28.8%, -41.5%, and +1.9% YoY in terms of aircraft departures, passengers and freight for the Top 15

AUG 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)	23,696	↓ -41.5%	Guangzhou, CN (CAN)	2,304,846	↓ -30.0%	Memphis TN, US (MEM)	380,582	↑ 4.6%
Chicago IL, US (ORD)	23,000	↓ -44.6%	Chengdu, CN (CTU)	2,190,914	↓ -13.3%	Hong Kong SAR, CN (HKG)	370,000	↓ -2.2%
Dallas/Fort Worth TX, US (DFW)	22,401	↓ -32.1%	Shenzhen, CN (SZX)	1,999,460	↓ -14.8%	Shanghai, CN (PVG)	298,310	↑ 2.1%
Denver CO, US (DEN)	19,934	↓ -31.6%	Kunming, CN (KMG)	1,916,054	↓ -12.7%	Anchorage AK, US (ANC)	284,367	↑ 25.4%
Guangzhou, CN (CAN)	18,593	↓ -12.1%	Xi'an, CN (XIY)	1,783,064	↓ -18.9%	Louisville KY, US (SDF)	230,031	↓ -1.5%
Charlotte NC, US (CLT)	16,464	↓ -33.4%	Beijing, CN (PEK)	1,777,309	↓ -60.6%	Incheon, KR (ICN)	225,124	↑ 2.5%
Shanghai, CN (PVG)	16,347	↓ -23.0%	Shanghai, CN (PVG)	1,698,382	↓ -49.4%	Taipei, CN (TPE)	206,414	↑ 12.9%
Shenzhen, CN (SZX)	15,723	↓ -0.5%	Shanghai, CN (SHA)	1,680,578	↓ -12.8%	Los Angeles CA, US (LAX)	184,436	↑ 9.1%
Chengdu, CN (CTU)	15,193	↓ -4.0%	Dallas/Fort Worth TX, US (DFW)	1,633,377	↓ -52.5%	Doha, QA (DOH)	183,828	↑ 5.6%
Kunming, CN (KMG)	15,006	↓ -5.4%	Hangzhou, CN (HGH)	1,576,986	↓ -11.5%	Miami FL, US (MIA)	183,361	↑ 11.8%
Long Beach CA, US (LGB)	14,857	↓ -2.9%	Atlanta GA, US (ATL)	1,497,570	↓ -69.7%	Chicago IL, US (ORD)	168,976	↑ 15.7%
Beijing, CN (PEK)	14,772	↓ -42.8%	Denver CO, US (DEN)	1,492,841	↓ -53.8%	Frankfurt, DE (FRA)	152,835	↓ -6.4%
Los Angeles CA, US (LAX)	14,291	↓ -53.7%	Jeju, KR (CJU)	1,163,549	↓ -20.0%	Tokyo, JP (NRT)	149,954	↓ -10.9%
Xi'an, CN (XIY)	14,085	↓ -8.4%	Moscow, RU (DME)	1,147,752	↓ -27.4%	Guangzhou, CN (CAN)	146,352	↓ -4.9%
Anchorage AK, US (ANC)	13,919	↓ -17.2%	Chicago IL, US (ORD)	1,140,739	↓ -71.4%	Dubai, AE (DXB)	135,384	↓ -33.3%

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 **-28.8%** YoY. The list was comprised of eight US and seven Chinese airports. **Atlanta** ranked **1st** followed by Chicago and Dallas/Fort Worth. Most Chinese airports in the Top 15 held median positions and showed smaller declines, with **Shenzhen** recording the smallest decline of **-0.5%**.

In terms of **passengers**, all the Top 15 airports posted declines with a total fall of **-41.5%** YoY. The list continued to be dominated by Chinese and US airports. The Top 8 were only Chinese airports with **Guangzhou** retaining the **1st** position. Similar to departures, overall smaller declines were observed in Chinese airports. **Moscow** made it to the Top 15 owing to the bullish domestic traffic growth.

In terms of **freight**, the Top 15 airports reported a YoY increase of **+1.9%**. This was the third consecutive growth since June, and over half of the Top 15 posted YoY increase with the strongest growth recorded by **Anchorage (+25.4%)**. **Memphis** remained at **1st** growing at **+4.6%**, followed by **Hong Kong (-2.2%)** and **Shanghai (+2.1%)**.

TOP 15 AIRLINE GROUPS (Ranked by RPK)

AUG 2020: -66.9% YoY in terms of RPK for the Top 15

In terms of RPK, the Top 15 airline groups accounted for **58.1%** of the world's total RPK in August 2020 and declined by **-66.9%** YoY. This decline was 8.4 percentage points smaller than the fall in world's average RPK, with all airlines in the Top 15 posting contractions.

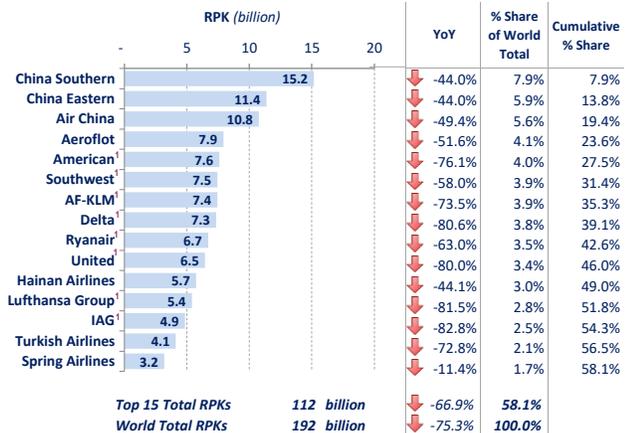
The Top 15 list was the same as the previous month, dominated by airlines in China, US and Europe, with few movements in the rankings due to the diverging recovery pace by country.

China Southern, China Eastern and **Air China** remained at Top 3, with traffic recovered to over 50% of the 2019 level. Two other Chinese airlines, **Hainan Airlines** and **Spring Airlines** have slipped down the list to **11th** and **15th**, respectively, as major airlines in other regions continued to recover. Nevertheless, Spring Airlines recorded the fastest recovery with traffic returning to 88.6% of the 2019 level.

Both **American** and **Southwest** fell 1 position to **5th** and **6th**, overtaken by **Aeroflot**. **Delta** and **United** continued to record relatively slower recovery with traffic at around merely 20% of the 2019 level, and ranked **8th** and **10th**, respectively.

Airlines in Europe recorded gradual improvements with more noticeable increase recorded by **Aeroflot**, which ranked 2 positions up to **4th** and recovered to almost 50% of the 2019 traffic level. **AF-KLM** and **Ryanair** went up to **7th** and **9th**, respectively. Other airlines in the Top 15 improved modestly.

AUG 20

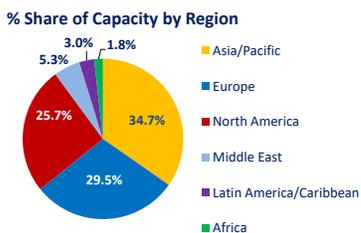


(Source: ICAO, airlines' websites)

Note: Total scheduled and non-scheduled services

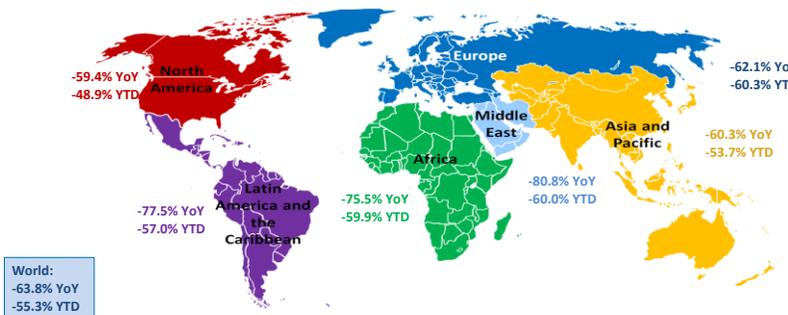
CAPACITY BY REGION (ICAO Statistical Regions)

AUG 2020: -63.8% YoY in terms of World ASK



(Source: ICAO, IATA, OAG)

Note: Total scheduled services



Worldwide capacity contracted by **-63.8%** YoY in August 2020.

Capacity improvements were observed in all regions with a relatively stronger increase in Europe where lockdowns and cross-border travel restrictions eased during the summer period.

North America and Asia/Pacific posted the fastest recovery in capacity, at around 60% below the pre-COVID-19 level.

* 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.