ICAO

ECONOMIC DEVELOPMENT

AUG 2021: Air Transport Monthly Monitor

World Results and Analyses for JUN 2021. Total scheduled services (domestic and international).

Air Transport Bureau
E-mail: ecd@icao.int

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

GLOBAL KEY FIGURES

JUN 2021 *(versus JUN 2019)*

RPK ▼ -60.1% **ASK** ▼ -51.6% **FTK** ▲ +9.9% **LF**: 69.6% ▼ -14.8%

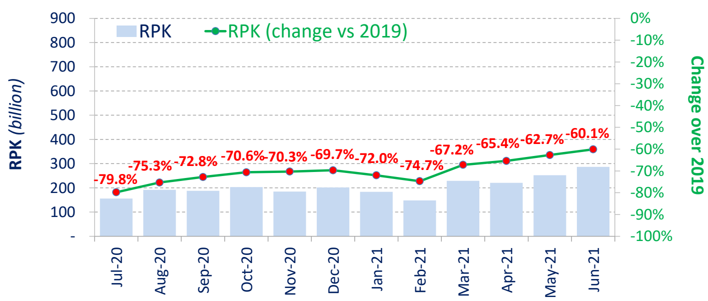
OUTLOOK* - JUL 2021 *(versus JUL 2019)*

ASK ▼ -46.8% * Source OAG

PASSENGER TRAFFIC

Revenue Passenger-Kilometres - RPK

World passenger traffic fell by -60.1% in June 2021 (compared to 2019), +2.6 percentage points up from the decline in the previous month. Although the traditional demand driver – economic activity – has been showing upward trend, air travel continued to be largely affected by the rising COVID-19 cases and strict travel restrictions amid the spread of new variants. Overall, for the first half of 2021, passenger traffic remained at more than -60% below the 2019 levels, with the Middle East and Europe recording the weakest performance.

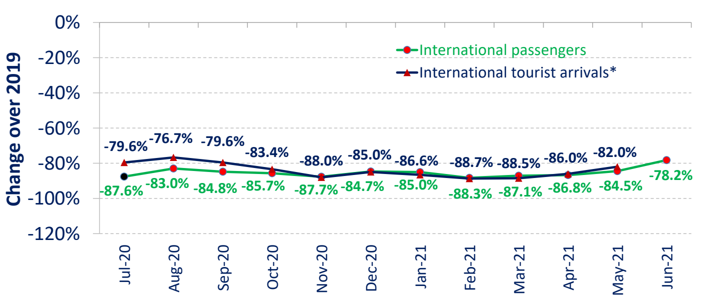


(Source: ICAO, IATA, OAG)

International Passengers vs. Tourist Arrivals

International passenger numbers fell by -78.2% in June 2021 (compared to 2019), +6.3 percentage points up from the decline in the previous month. Cross-border travel restrictions continued to weigh heavily on international travel demand. As a result, international traffic for the first half of 2021 was far below 2019 levels.

The international tourist arrivals also remained stagnant and followed a similar trend as international passenger traffic.



*UNWTO Definition

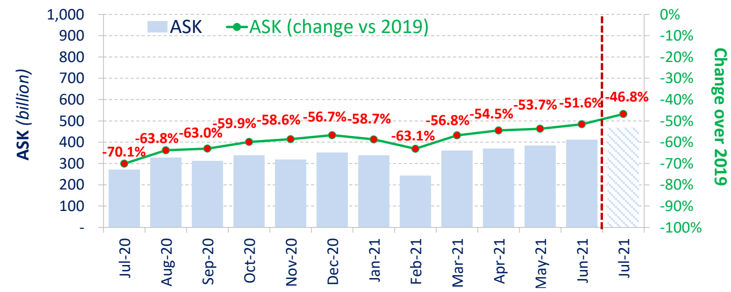
(Source: ICAO, UNWTO)

CAPACITY

Available Seat-Kilometres - ASK

Capacity worldwide fell by -51.6% in June 2021 (compared to 2019), +2.1 percentage points up from the decline in the previous month (-53.7%).

As air travel continues to recover, capacity is expected to increase in July 2021 to -46.8% down from the 2019 levels.

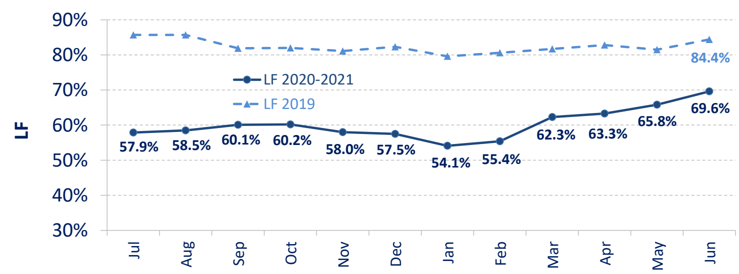


(Source: ICAO, IATA, OAG)

Load Factor - LF

The passenger Load Factor reached 69.6% in June 2021, +3.8 percentage points higher than the previous month. Domestic load factor continued to show solid performance and returned to a little less than 80%.

As the recovery of capacity was faster than travel demand recovery, the June LF remained significantly below 2019 levels at -14.8 percentage points lower.

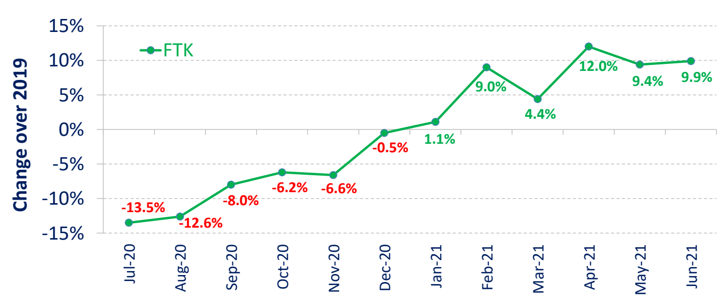


(Source: IATA)

FREIGHT TRAFFIC

Freight Tonne-Kilometres - FTK

World freight traffic reported a growth of +9.9% in June 2021 (compared to 2019), +0.5 percentage point higher than the growth in the previous month. Air cargo sustained its strong growth supported by the continued increase in trade and manufacturing. Demand for air cargo is likely to further grow underpinned by the global economic recovery. Performance was mixed across regions. All regions, except for Latin America/Caribbean, have returned to pre-pandemic traffic levels. While Africa, North America and the Middle East have shown double-digit growth, Asia/Pacific and Europe grew modestly. Overall, for the first half of 2021, air cargo was +8.0% above the 2019 levels.



(Source: IATA)

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.

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

JUN 2021: -10.6%, -23.5%, and +16.0% (vs. 2019) in terms of aircraft departures, passengers and freight for the Top 15

JUN 21

Airports (ranking by number of departures)	Departures	vs. 2019	Airports (ranking by number of passengers)	Passengers*	vs.2019	Airports (ranking by tonnes of freight)	Freight**	vs. 2019
Chicago IL, US (ORD)	31,472	-21.9%	Atlanta GA, US (ATL)	3,727,163	-25.0%	Hong Kong SAR, CN (HKG)	396,000	4.5%
Atlanta GA, US (ATL)	30,953	-20.9%	Dallas/Fort Worth TX, US (DFW)	3,174,904	-7.2%	Memphis TN, US (MEM)	374,904	7.9%
Dallas/Fort Worth TX, US (DFW)	29,595	-3.6%	Denver CO, US (DEN)	2,857,674	-10.5%	Shanghai, CN (PVG)	359,739	23.0%
Denver CO, US (DEN)	26,409	-4.9%	Chicago IL, US (ORD)	2,674,431	-32.3%	Anchorage AK, US (ANC)	307,678	29.2%
Charlotte NC, US (CLT)	23,228	-3.6%	Los Angeles CA, US (LAX)	2,443,847	-39.2%	Incheon, KR (ICN)	271,513	23.2%
Los Angeles CA, US (LAX)	23,009	-22.2%	Chengdu, CN (CTU)	2,094,746	-5.9%	Louisville KY, US (SDF)	241,749	9.4%
Houston TX, US (IAH)	17,450	-12.1%	Charlotte NC, US (CLT)	2,093,605	-3.0%	Taipei, CN (TPE)	221,534	27.9%
Seattle WA, US (SEA)	17,377	-13.6%	Orlando FL, US (MCO)	1,910,929	-10.7%	Los Angeles CA, US (LAX)	216,236	30.1%
Las Vegas NV, US (LAS)	17,331	-12.6%	Las Vegas NV, US (LAS)	1,905,746	-14.7%	Doha, QA (DOH)	214,908	24.0%
Phoenix AZ, US (PHX)	17,204	-0.4%	Seattle WA, US (SEA)	1,903,679	-22.4%	Tokyo, JP (NRT)	209,170	20.2%
Shanghai, CN (PVG)	16,952	-20.4%	Phoenix AZ, US (PHX)	1,819,490	-5.0%	Chicago IL, US (ORD)	202,605	33.5%
Miami FL, US (MIA)	16,406	-1.2%	Shanghai, CN (PVG)	1,775,344	-45.2%	Miami FL, US (MIA)	187,311	10.9%
Anchorage AK, US (ANC)	16,403	1.2%	Miami FL, US (MIA)	1,750,691	-7.6%	Dubai, AE (DXB)	186,346	-3.1%
Long Beach CA, US (LGB)	15,367	11.7%	Xi'An, CN (XIY)	1,726,563	-10.0%	Frankfurt, DE (FRA)	183,204	10.9%
Salt Lake City UT, US (SLC)	15,111	1.3%	Beijing, CN (PEK)	1,646,400	-59.3%	Paris, FR (CDG)	165,400	3.8%

__Note__: Total scheduled and non-scheduled services

(Source: ACI)

In terms of **aircraft departures**, the Top 15 airports reported a combined fall of **-10.6**%, compared to 2019. The Top 15 list consists mostly of US airports with only one Chinese airport (Shanghai). **Chicago** overtook Atlanta and became **1st** with a decline of **-21.9%**. Three airports, **Long Beach**, **Salt Lake City** and **Anchorage** posted increases compared to 2019.

In terms of **passengers**, the Top 15 airports posted a total fall of **-23.5%,** compared to 2019. The list was dominated exclusively by US (11) and Chinese (4) airports. **Atlanta** remained at **1st** with **-25.0%** decline, followed by **Dallas/Fort Worth**. Two Chinese airports, **Beijing** and **Shanghai**, recorded the largest fall at **-59.3%** and **-45.2%**, respectively.

In terms of **freight**, the Top 15 airports reported an increase of **+16.0%**, compared to 2019. **Dubai** continued to be the only airport posting decline (**-3.1%**). With an increase of **+4.5%**, **Hong Kong** retained the **1st** position followed by **Memphis**. With a robust **+33.5%**, **Chicago** recorded the strongest increase for the fifth time in a row.

TOP 15 AIRLINE GROUPS (Ranked by RPK)

JUN 2021: -46.5% (vs. 2019) in terms of RPK for the Top 15

In terms of RPK, the Top 15 airline groups accounted for 60.5% of the world's total RPK in June 2021 and declined by -46.5% compared to 2019. This decline was 13.6 percentage points smaller than the fall in world's average RPK. Airlines with large domestic markets continued to lead the growth chart.

US airlines improved significantly and reclaimed the top positions. **American** maintained at **1st** with a decline of **-23.8%** compared to 2019. **Delta** and **United** improved 1 position to **2nd** and **3rd**, albeit recovering at a slower pace than other US airlines in the Top 15. For the first time of the year, **Southwest** ranked **4th**, 3 positions up from the previous month.

Due to the tightened travel restrictions, Chinese domestic travel demand fell drastically, reversing the positive recovery trend. As a result, rankings of all Chinese airlines dropped. **China Southern, China Eastern** and **Air China** ranked down to **5th**, **6th** and **8th**, respectively.

Airlines in Europe started to pick up modestly as international restrictions remained strict despite the rapid vaccine rollouts. The three major airline groups, **AF-KLM**, **Lufthansa** and **IAG** recorded the largest contractions among the Top 15. **Aeroflot** and **Turkish Airlines** showed better performance owing to their domestic demand.

No airlines from the other regions, i.e. Africa, the Middle East and Latin America/Caribbean, ranked in the Top 15.

JUN 21

	RPK (billion)	Change over 2019	% Share of World Total	Cumulative % Share
American[1]	27.0	-23.8%	9.4%	9.4%
Delta[1]	21.4	-41.7%	7.5%	16.9%
United[1]	19.8	-46.1%	6.9%	23.8%
Southwest[1]	16.5	-14.7%	5.8%	29.5%
China Southern	13.2	-42.1%	4.6%	34.1%
China Eastern	10.9	-40.1%	3.8%	37.9%
Aeroflot	9.9	-32.0%	3.5%	41.4%
Air China	9.3	-50.6%	3.3%	44.7%
AF-KLM[1]	8.5	-67.6%	3.0%	47.6%
Lufthansa Group[1]	7.6	-72.3%	2.6%	50.3%
Turkish Airlines	6.8	-47.4%	2.4%	52.6%
Jetblue Airways[1]	6.6	-11.4%	2.3%	54.9%
Hainan Airlines	5.4	-56.3%	1.9%	56.8%
IAG[1]	5.3	-80.1%	1.8%	58.7%
Alaska Airlines[1]	5.2	-37.2%	1.8%	60.5%
Top 15 Total RPKs	*173 billion*	*-46.5%*	*60.5%*	
World Total RPKs	*287 billion*	*-60.1%*	*100.0%*	

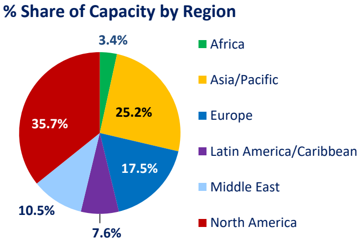
(Source: ICAO, airlines' websites)

__Note__: Total scheduled and non-scheduled services

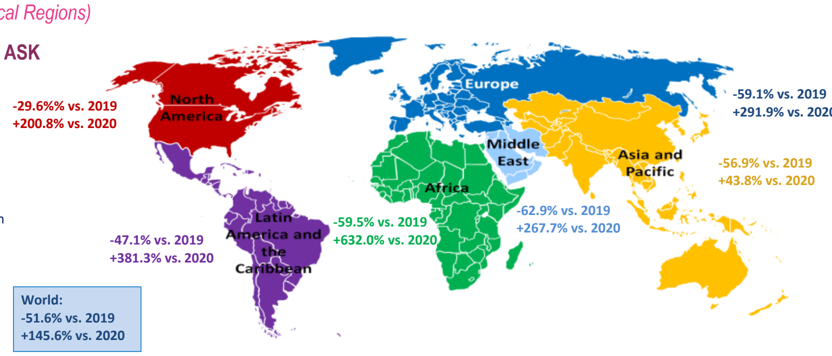
CAPACITY BY REGION *(ICAO Statistical Regions)*

JUN 2021: -51.6% (vs. 2019) in terms of World ASK

% Share of Capacity by Region



(Source: ICAO, IATA, OAG)
__Note__: Total scheduled services



Worldwide capacity contracted by -51.6% in June 2021, compared to 2019. All regions saw improvements in capacity compared to the previous month, except for Asia/Pacific and the Middle East. The fastest capacity recovery was recorded in North America, whereas the slowest pace was in the Middle East.

For the first half of 2021, capacity has recovered to -56.4% below the 2019 levels.

* Embarked Passengers ** Loaded and Unloaded Freight inTonnes 1. ICAO estimates

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