



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

GLOBAL KEY FIGURES

APR 2021
(versus APR 2019)

RPK ▼ -65.4% **ASK** ▼ -54.5% **FTK** ▲ +12.0% **LF:** 63.3% ▼ -19.5 pt

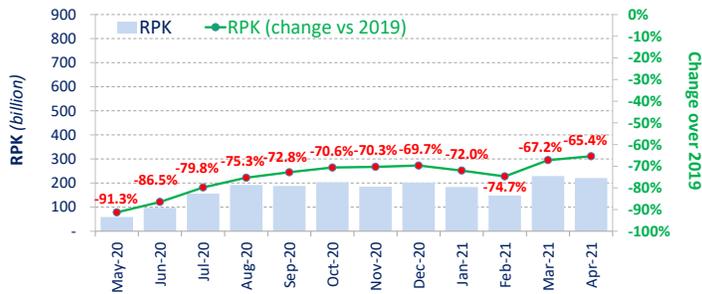
OUTLOOK* - MAY 2021
(versus MAY 2019)

ASK ▼ -52.1% * Source OAG

PASSENGER TRAFFIC

Revenue Passenger-Kilometres - RPK

World passenger traffic fell by -65.4% in April 2021 (compared to 2019), +1.8 percentage points up from the decline in the previous month. Recovery in air travel continued alongside the decline in new COVID-19 cases at the global level. Nevertheless, wide disparities exist between regions as a result of the varying pandemic situation and travel restrictions, particularly the emergence of new variants in certain parts of the world. Domestic travel remained the driving force for recovery with both domestic traffic of China and Russia Federation surpassing the 2019 levels.



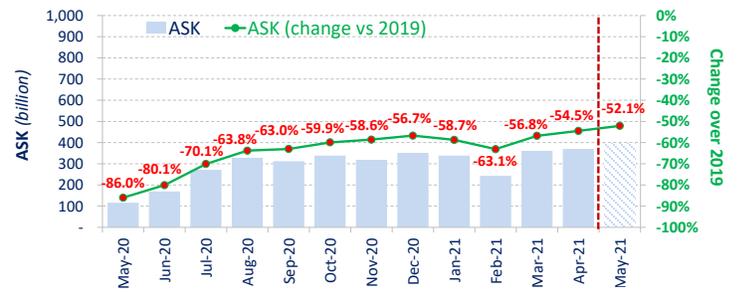
(Source: ICAO, IATA, OAG)

CAPACITY

Available Seat-Kilometres - ASK

Capacity worldwide fell by -54.5% in April 2021 (compared to 2019), +2.3 percentage points up from the decline in the previous month (-56.8%).

With the ongoing improvements, capacity is expected to increase in May 2021 to -52.1% down from the 2019 level.

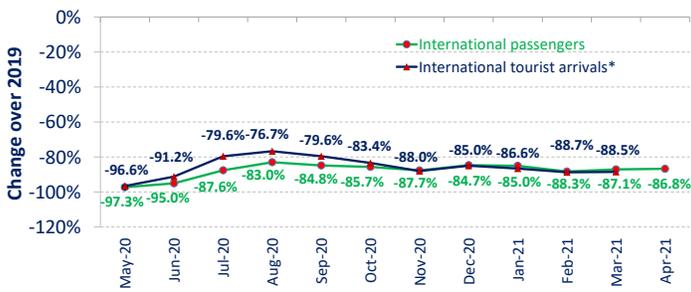


(Source: ICAO, IATA, OAG)

International Passengers vs. Tourist Arrivals

International passenger numbers fell by -86.8% in April 2021 (compared to 2019), +0.3 percentage point up from the decline in the previous month. International travel remained unchanged with strict border restrictions due to the concern of surging new variants. Asia/Pacific and Europe were the slowest recovering regions.

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



*UNWTO Definition

(Source: ICAO, UNWTO)

Load Factor - LF

The passenger Load Factor reached 63.3% in April 2021, +1.0 percentage point higher than the previous month. Domestic load factor picked up notably and reached above 70%.

As air travel demand fell faster than capacity, the April LF was -19.5 percentage points lower than the rate in the same period of 2019.

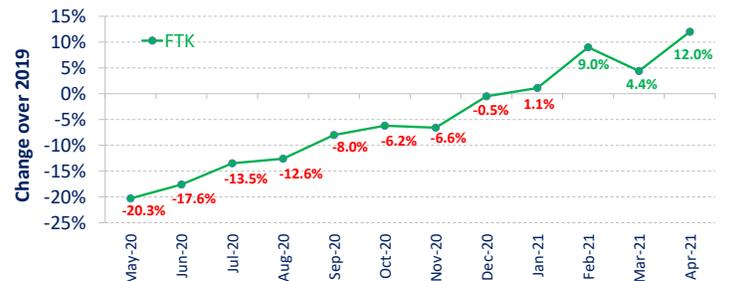


(Source: IATA)

FREIGHT TRAFFIC

Freight Tonne-Kilometres - FTK

World freight traffic reported a growth of +12.0% in April 2021 (compared to 2019), +7.6 percentage points higher than the growth in the previous month. After one month of moderation, freight traffic rose sharply with double-digit growth. Several factors have been contributing to the strong air cargo demand such as the strengthening in global economic activity, trade, and rise in consumer spending including e-commerce. All regions showed improvements in freight traffic, except for Latin America/Caribbean which was the only region remained below 2019 levels and further deteriorated in April. Africa and North America continued to lead the growth chart, expanding at over +30% and +20%, respectively.



(Source: IATA)



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

APR 2021: -15.2%, -27.7%, and +20.7% (vs. 2019) in terms of aircraft departures, passengers and freight for the Top 15

APR 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
Atlanta GA, US (ATL)	28,987	↓ -23.4%	Guangzhou, CN (CAN)	2,572,212	↓ -11.5%	Memphis TN, US (MEM)	394,102	↑ 10.0%
Dallas/Fort Worth TX, US (DFW)	25,945	↓ -7.0%	Atlanta GA, US (ATL)	2,459,167	↓ -46.7%	Hong Kong SAR, CN (HKG)	386,000	↑ 0.3%
Chicago IL, US (ORD)	23,124	↓ -37.9%	Dallas/Fort Worth TX, US (DFW)	2,364,643	↓ -21.0%	Shanghai, CN (PVG)	369,348	↑ 28.0%
Charlotte NC, US (CLT)	22,527	↓ -4.5%	Chengdu, CN (CTU)	2,329,002	↑ 4.6%	Anchorage AK, US (ANC)	296,747	↑ 34.7%
Denver CO, US (DEN)	22,233	↓ -10.0%	Denver CO, US (DEN)	2,182,807	↓ -18.0%	Incheon, KR (ICN)	274,906	↑ 25.2%
Guangzhou, CN (CAN)	19,588	↑ 0.5%	Beijing, CN (PEK)	2,061,124	↓ -48.4%	Louisville KY, US (SDF)	240,047	↑ 16.3%
Shanghai, CN (PVG)	18,856	↓ -10.6%	Shenzhen, CN (SZX)	2,055,444	↓ -1.3%	Taipei, CN (TPE)	238,926	↑ 37.3%
Los Angeles CA, US (LAX)	17,912	↓ -37.0%	Shanghai, CN (PVG)	1,994,315	↓ -37.2%	Chicago IL, US (ORD)	229,189	↑ 61.0%
Phoenix AZ, US (PHX)	16,442	↓ -12.5%	Charlotte NC, US (CLT)	1,889,407	↓ -8.9%	Miami FL, US (MIA)	223,015	↑ 22.5%
Miami FL, US (MIA)	15,962	↓ -7.6%	Shanghai, CN (SHA)	1,863,172	↓ -1.3%	Doha, QA (DOH)	222,339	↑ 26.3%
Beijing, CN (PEK)	15,863	↓ -31.6%	Chicago IL, US (ORD)	1,768,126	↓ -48.6%	Los Angeles CA, US (LAX)	218,740	↑ 33.8%
Chengdu, CN (CTU)	15,819	↑ 7.7%	Hangzhou, CN (HGH)	1,669,198	↑ 2.3%	Tokyo, JP (NRT)	217,540	↑ 26.4%
Shenzhen, CN (SZX)	15,568	↑ 6.9%	Orlando FL, US (MCO)	1,637,822	↓ -24.6%	Dubai, AE (DXB)	198,251	↓ -1.4%
Long Beach CA, US (LGB)	15,488	↑ 20.7%	Phoenix AZ, US (PHX)	1,585,007	↓ -20.7%	Frankfurt, DE (FRA)	194,942	↑ 16.3%
Houston TX, US (IAH)	15,109	↓ -23.0%	Los Angeles CA, US (LAX)	1,537,468	↓ -57.5%	Paris, FR (CDG)	173,118	↑ 12.1%

Note: Total scheduled and non-scheduled services

(Source: ACI)

In terms of **aircraft departures**, the Top 15 airports reported a combined fall of **-15.2%**, compared to 2019. The Top 15 list consists of ten US and five Chinese airports. **Atlanta** remained 1st with a decline of **-23.4%**. **Long Beach** continued to increase double-digitally, followed by **Chengdu** (+7.7%) and **Shenzhen** (+6.9%), respectively.

In terms of **passengers**, the Top 15 airports posted a total fall of **-27.7%**, compared to 2019. Same as departures, only US (8) and Chinese (7) airports ranked within Top 15. **Guangzhou** retained the 1st position with **-11.5%** decline. Overall, Chinese airports showed smaller contractions with **Chengdu** and **Hangzhou** posting positive growth at **+4.6%** and **+2.3%**, respectively.

In terms of **freight**, the Top 15 airports reported an increase of **+20.7%**, compared to 2019. All Top 15 rose robustly, except for **Dubai** (-1.4%). **Memphis** remained 1st with a growth of **+10.0%** followed by **Hong Kong** (+0.3%). For the third consecutive month, **Chicago** recorded the strongest increase at **+61.0%**.

TOP 15 AIRLINE GROUPS (Ranked by RPK)

APR 2021: -54.9% (vs. 2019) in terms of RPK for the Top 15

In terms of RPK, the Top 15 airline groups accounted for 60.9% of the world's total RPK in April 2021 and declined by -54.9% compared to 2019. This decline was 10.5 percentage points smaller than the fall in world's average RPK.

While global passenger traffic improved, the recovery pace remained uneven among regions. Airlines in countries with large domestic markets continued to lead the growth chart.

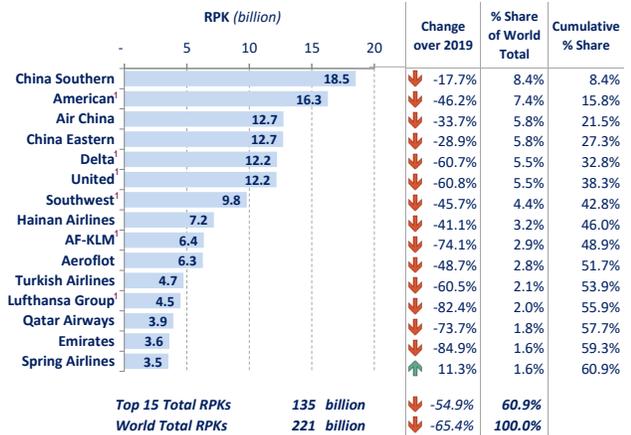
All Chinese airlines recorded faster recovery compared to other airlines in the Top 15. **China Southern** maintained the 1st position with RPKs at -17.7% below 2019 levels. **Air China** overtook **China Eastern** became 3rd, and **Hainan Airlines** kept the same position. **Spring Airlines** continued to be the only airline posting positive growth and expanded strongly at +11.3%.

US airlines demonstrated solid improvements. **American** and **Southwest** showed relatively faster recovery than other US airlines in the Top 15. **American** ranked 2nd and recovered to over half of the 2019 RPK levels. **Delta**, **United** and **Southwest** stayed at the same positions as in March.

Recovery of airlines in Europe has been weak. **Lufthansa** and **KLM** continued to post the second and third largest contraction from 2019 levels. **Aeroflot** and **Turkish Airlines** showed slightly better performance at -48.7% and -60.5%, respectively.

Airlines in the Middle East also experienced slow recovery with **Emirates** posting the largest contraction from 2019 levels, at -84.9%.

APR 21



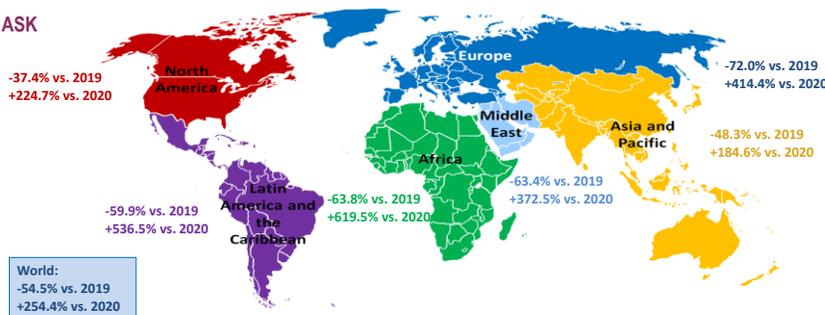
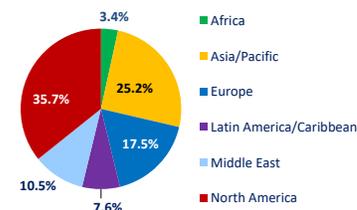
(Source: ICAO, airlines' websites)

Note: Total scheduled and non-scheduled services

CAPACITY BY REGION (ICAO Statistical Regions)

APR 2021: -54.5% (vs. 2019) in terms of World ASK

% Share of Capacity by Region



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

Worldwide capacity contracted by -54.5% in April 2021, compared to 2019. All regions saw slight improvements in capacity compared to the previous month, except for Africa and Latin America/Caribbean which experienced larger declines.

Capacity offered in North America and Asia/Pacific showed the smallest decline from 2019 levels, while Europe continued to record the slowest capacity recovery.

* 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.