ICAO

ECONOMIC DEVELOPMENT

NOV 2021: Air Transport Monthly Monitor

World Results and Analyses for SEP 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

SEP 2021 *(versus SEP 2019)*

RPK ▼ -53.4% **ASK** ▼ -43.6% **FTK** ▲ 9.1% **LF**: 67.6% ▼ -14.3%

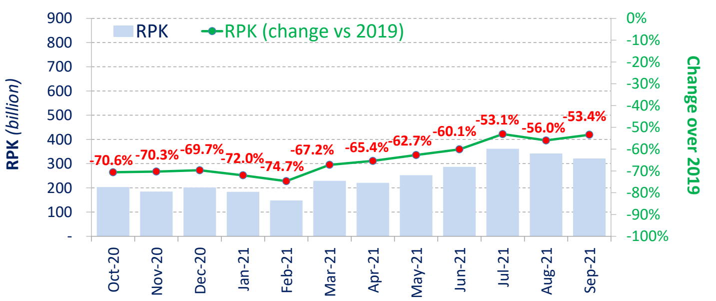
OUTLOOK* - OCT 2021 *(versus OCT 2019)*

ASK ▼ -40.3% * Source OAG

PASSENGER TRAFFIC

Revenue Passenger-Kilometres - RPK

World passenger traffic fell by -53.4% in September 2021 (compared to 2019), +2.6 percentage points up from the decline in the previous month. Air travel improved slightly from the deterioration in August, mainly owing to the uptick in domestic travel, particularly the rebound in Chinese domestic market. Conversely, the fall in traffic worsened in some regions such as Africa and Europe. The momentum of air travel recovery appeared to wane towards the end of the summer season, however, the positive vaccination progress is likely to support the recovery in the coming months.

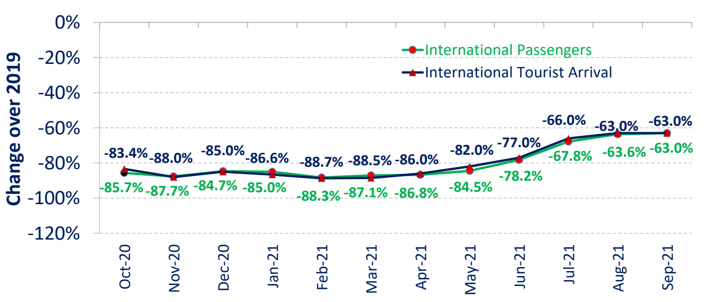


(Source: ICAO, IATA, OAG)

International Passengers vs. Tourist Arrivals

International passenger numbers fell by -63.0% in September 2021 (compared to 2019), +0.6 percentage point up from the decline in the previous month. International travel recovery has paused across all regions, partially attributed to the weaken demand in the less busy travel season.

The recovery in international tourist arrivals also stalled and followed a similar trend as international passenger traffic.



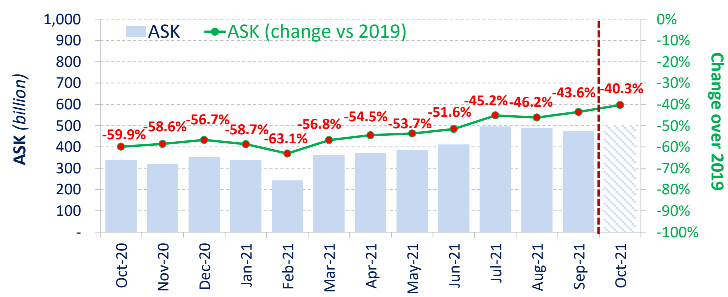
*UNWTO Definition (Source: ICAO, UNWTO)

CAPACITY

Available Seat-Kilometres - ASK

Capacity worldwide fell by -43.6% in September 2021 (compared to 2019), +2.6 percentage points up from the decline in the previous month (**-46.2%**).

With signs of easing restriction, airlines are gradually adding capacity back to the market. Thus, the September capacity is expected to improve to **-40.3%** down from the 2019 levels.

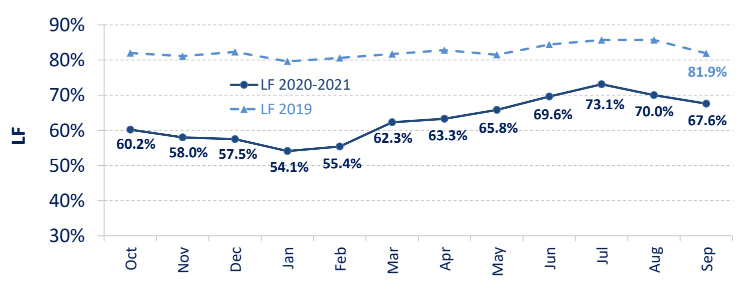


(Source: ICAO, IATA, OAG)

Load Factor - LF

The passenger Load Factor reached 67.6% in September 2021, -2.4 percentage points lower than the previous month. Load factor continues to trend downwards as the return of capacity was faster than the recovery of travel demand.

The September LF remained significantly below 2019 levels at -14.3 percentage points lower.

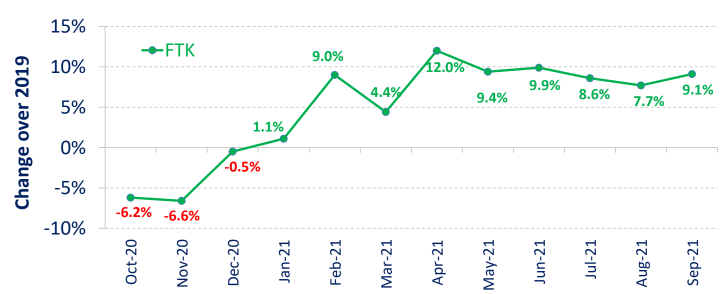


(Source: IATA)

FREIGHT TRAFFIC

Freight Tonne-Kilometres - FTK

World freight traffic reported a growth of +9.1% in September 2021 (compared to 2019), +1.4 percentage points up from the growth in the previous month. Air cargo has benefited from the global supply chain congestion as businesses have been shifting volume from ocean to air in order to avoid long delivery times and delays. The strong demand in goods and businesses restocking inventories to prepare for the upcoming peak consumer events, will continue to support air cargo growth in the months ahead. Performance by region was a mix. Whereas Africa, North America and the Middle East demonstrated robust growth, the other regions saw either no improvement or deterioration. Latin America/Caribbean remained the weakest performing region with a contraction of over -10% from 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)

AUG 2021: -10.8%, -23.7%, and +14.2% (vs. 2019) in terms of aircraft departures, passengers and freight for the Top 15

SEP 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)	33,389	-14.8%	Atlanta GA, US (ATL)	3,515,319	-19.5%	Hong Kong SAR, CN (HKG)	452,000	13.8%
Atlanta GA, US (ATL)	32,148	-11.3%	Denver CO, US (DEN)	2,732,441	-8.3%	Memphis TN, US (MEM)	379,234	14.9%
Dallas/Fort Worth TX, US (DFW)	28,129	-8.2%	Chicago IL, US (ORD)	2,696,151	-23.9%	Anchorage AK, US (ANC)	291,735	27.8%
Denver CO, US (DEN)	27,164	-1.0%	Dallas/Fort Worth TX, US (DFW)	2,691,133	-12.4%	Incheon, KR (ICN)	281,477	26.6%
Los Angeles CA, US (LAX)	23,290	-16.1%	Los Angeles CA, US (LAX)	2,186,039	-37.6%	Shanghai, CN (PVG)	249,503	-20.3%
Charlotte NC, US (CLT)	21,689	-9.7%	Istanbul, TR (IST)	2,030,510	-35.0%	Taipei, CN (TPE)	231,985	26.2%
Houston TX, US (IAH)	18,360	-1.9%	Antalya, TR (AYT)	1,908,802	-21.2%	Louisville KY, US (SDF)	231,421	11.1%
Las Vegas NV, US (LAS)	18,087	-10.8%	Las Vegas NV, US (LAS)	1,890,062	-12.9%	Tokyo, JP (NRT)	218,704	23.7%
Newark NJ, US (EWR)	17,825	-4.7%	Charlotte NC, US (CLT)	1,824,418	-9.2%	Doha, QA (DOH)	214,398	18.9%
Phoenix AZ, US (PHX)	17,426	2.5%	Guangzhou, CN (CAN)	1,775,077	-41.0%	Los Angeles CA, US (LAX)	211,687	32.6%
Seattle WA, US (SEA)	17,305	-9.2%	Moscow, RU (SVO)	1,755,011	-24.3%	Miami FL, US (MIA)	201,710	27.2%
Amsterdam, NL (AMS)	16,182	-29.3%	Seattle WA, US (SEA)	1,705,417	-23.5%	Dubai, AE (DXB)	197,932	-4.1%
Guangzhou, CN (CAN)	16,077	-21.5%	Shenzhen, CN (SZX)	1,688,167	-22.2%	Chicago IL, US (ORD)	181,340	24.7%
Salt Lake City UT, US (SLC)	15,094	8.1%	Phoenix AZ, US (PHX)	1,646,864	-4.6%	Frankfurt, DE (FRA)	181,087	9.9%
Istanbul, TR (IST)	14,875	-22.4%	New Delhi, IN (DEL)	1,610,236	-43.5%	Guangzhou, CN (CAN)	174,079	7.0%

Note: Total scheduled and non-scheduled services (Source: ACI)

In terms of **aircraft departures**, the Top 15 airports reported a combined fall of **-10.8**%, compared to 2019. All the Top 15 airports, except three, were US airports. **Chicago** remained **1st** with a decline of **-14.8%.** The three non-US airports posted the largest fall among the Top 15, i.e. **Amsterdam** (**-29.3%**), **Istanbul** (**-22.4%**) and **Guangzhou** (**-21.5%**).

In terms of **passengers**, the Top 15 airports posted a total fall of **-23.7%,** compared to 2019. The Top 15 list has a mix of airports from North America, Europe and Asia/Pacific. Owing to the improvements in domestic travel, **New Delhi**, **Guangzhou** and **Shenzhen** re-appeared in the Top 15. Three US airports, **Phoenix**, **Denver** and **Charlotte**, recorded the smallest fall of less than -10%.

In terms of **freight**, the Top 15 airports reported an increase of **+14.2%**, compared to 2019. **Hong Kong** retained the **1st** position with a solid growth of **+13.8%**. The majority of the Top 15 airports grew double-digitally, with the strongest increase in **Los Angeles** at **+32.6%**. For the first time of the year, **Shanghai** posted a significant decline at **-20.3%**.

TOP 15 AIRLINE GROUPS (Ranked by RPK)

SEP 2021: -46.1% (vs. 2019) in terms of RPK for the Top 15

In terms of RPK, the Top 15 airline groups accounted for 52.7% of the world's total RPK in September 2021 and declined by -46.1% compared to 2019. This decline was 9.9 percentage points smaller than the fall in world's average RPK.

Top 15 ranking changed dramatically again compared to August, due to the rebound of the Chinese domestic travel after the weakness and the pause in recovery in some other regions.

The performance of the US airlines has been relatively stable. The Top 4 positions were maintained by **American, Delta, United** and **Southwest**. **American** and **Southwest** posted much smaller declines from 2019 levels.

After experiencing the temporary dip, domestic passenger traffic in China picked up. Consequently, ranking of the Chinese airlines improved, with **China Southern** and **Air China** up by 7 and 3 positions to **5th** and **12th**, respectively. **China Eastern** returned to the Top 15 and ranked **13th**.

As the positive impetus from the peak summer travel demand started to diminish, traffic recovery in Europe weakened. Except Aeroflot, rankings of all other European airlines within the Top 15 dropped. **Lufthansa** ranked 1 position down to **6th**, after China Southern.

Qatar Airways and **Emirates** moved down to **14th** and **15th**, respectively. The latter has also recorded the largest contraction from 2019 levels, among all the Top 15 airlines.

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	RPK (billion)	Change over 2019	% Share of World Total	Cumulative % Share
American[1]	22.8	-17.6%	6.7%	6.7%
Delta[1]	19.6	-37.7%	5.7%	12.4%
United[1]	18.6	-31.5%	5.4%	17.8%
Southwest[1]	14.3	-10.4%	4.2%	22.0%
China Southern	12.7	-46.1%	3.7%	25.8%
Lufthansa Group[1]	12.2	-60.1%	3.6%	29.3%
Aeroflot	10.8	-25.9%	3.2%	32.5%
AF-KLM[1]	10.5	-58.8%	3.1%	35.6%
IAG[1]	10.1	-65.8%	3.0%	38.5%
Turkish Airlines	9.3	-32.8%	2.7%	41.2%
Ryanair[1]	9.1	-49.0%	2.6%	43.9%
Air China	8.5	-55.6%	2.5%	46.4%
China Eastern	8.4	-53.3%	2.5%	48.8%
Qatar Airways	7.4	-48.4%	2.2%	51.0%
Emirates	5.9	-76.6%	1.7%	52.7%
Top 15 Total RPKs	*180 billion*	*-46.1%*	*52.7%*	
World Total RPKs	*342 billion*	*-56.0%*	*100.0%*	

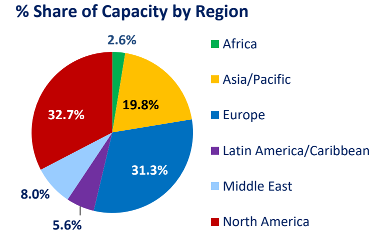
(Source: ICAO, airlines' websites)

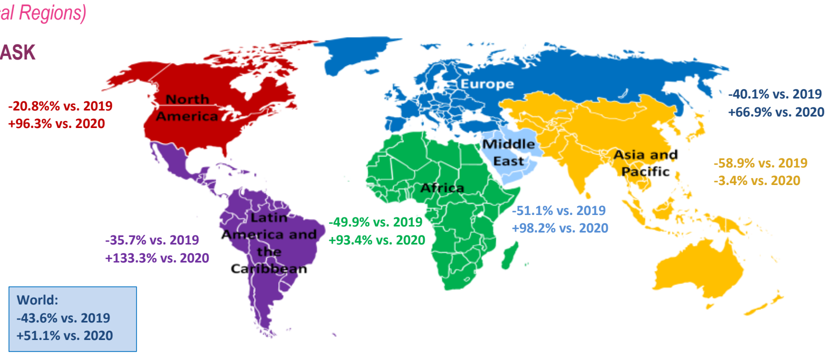
Note: Total scheduled and non-scheduled services

CAPACITY BY REGION *(ICAO Statistical Regions)*

SEP 2021: -43.6% (vs. 2019) in terms of World ASK

% Share of Capacity by Region





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

Worldwide capacity contracted by -43.6% in September 2021, compared to 2019, a moderate improvement from the contraction in August. This rebound was mostly attributed to the increase in Asia/Pacific, in particular the Chinese domestic capacity.

Capacity contraction eased in all other regions, except for Europe which posted a slightly larger fall.

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

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