



### GLOBAL KEY FIGURES

**SEP 2013**  
*(versus SEP 2012)*

**RPK** ▲ +5.5%    **ASK** ▲ +5.3%    **LF**: 80.3% ▲ +0.3 pts

**OUTLOOK - OCT 2013**  
*(versus OCT 2012)*

**ASK** ▲ +5.9%

### PASSENGER TRAFFIC

#### Revenue Passenger-Kilometres - RPK

World passenger traffic grew at +5.5% in September 2013 compared to September 2012. This monthly growth is 1.3 percentage points lower than the one registered last month (August traffic) but remains higher than the +5.0% average monthly growth posted since the beginning of the year.



(Source: ICAO, IATA, OAG, airlines websites)

### CAPACITY

#### Available Seat-Kilometres - ASK

Capacity worldwide increased by +5.3% in September 2013. September 2013 is the 5<sup>th</sup> consecutive month growth above 5%. Capacity is expected to increase by +5.9% in October 2013, which would become the highest capacity growth posted in the last 13 months.



(Source: ICAO, IATA, OAG, airlines websites)

### International traffic

International markets grew faster than domestic ones in September 2013, posting +5.7% year-on-year. However, this represents a -1.8 points decrease compared to August results.

International tourist arrivals is expected to follow the same month-on-month trend.



(Source: IATA, UNWTO)

\*Tourists by all modes of transport (air tourists account for 52% of the total in 2012)

### Load Factor - LF

The passenger Load Factor increased by 0.3 point in September 2013 compared to September 2012, reaching 80.3%. This monthly Load Factor is lower than the three last ones and marks the end of the Summer peak season.



(Source: IATA)

### OUTLOOK - OCT 2013

Based on OAG, a +5.9% growth rate in ASK is expected for October 2013.

Continued ►►



» Continued from page 1

### TOP 15 AIRPORTS

SEP 2013 -1.2% YoY in terms of departures for the Top 15

In term of departures, the Top 15 airports reported a decrease of -1.2% in September 2013 compared to September 2012. Only 3 airports out of 15 posted a positive year-on-year growth in August 2013.

Atlanta, after being relayed twice at the second rank, is back to the first rank in September, despite its -0.6% in departures. Atlanta remains the largest airport in term of passenger traffic (+1.5%).

9 airports out of 15 are in United States, 5 of them making the Top 5 of this Top 15. Only Charlotte (+3.3%) posted a positive growth, the other 8 decreased in term of departures.

Beijing, the only Asian airport in the Top 15, recorded the fastest growth of the Top 15 (+5.3%) and ranks 6<sup>th</sup> of the Top 15.

The 4 European airports of the Top 15 recorded negative growth, Paris having the largest decrease (-4.0%).

According to ACI, the world's airports reported an overall year-over-year gain of 4.1% in passenger traffic for the month of September. Accumulated traffic over a twelve month period from October 2012 to September 2013 increased by 3.1%. While overall growth has become relatively subdued as compared to 2012 and 2011 levels, air transport demand has remained resilient in the face of downside risks across the global economic landscape.

SEP 13				
Airports	Departures	YoY	Passengers*	YoY
Atlanta GA, US (ATL)	37,476	↓-0.6%	3,799,957	↑1.5%
Chicago IL, US (ORD)	36,781	↓-0.4%	2,774,335	↓-2.6%
Dallas/Fort Worth TX, US (DFW)	26,507	↓-1.3%	2,296,304	↓-3.9%
Denver CO, US (DEN)	24,928	↓-2.5%	2,189,525	↑0.8%
Los Angeles CA, US (LAX)	24,227	↓-2.2%	2,527,129	↑1.5%
Beijing, CN (PEK)	23,742	↑5.3%	3,544,701	↑4.1%
Las Vegas NV, US (LAS)	22,655	↓-2.9%	1,715,125	↓-3.0%
Charlotte NC, US (CLT)	21,668	↑3.3%	1,611,371	↑5.4%
Paris, FR (CDG)	21,481	↓-4.0%	2,762,796	↓-0.4%
Frankfurt, DE (FRA)	21,107	↓-0.7%	2,678,674	↑1.0%
London, GB (LHR)	19,920	↓-2.5%	3,175,262	↑0.6%
Houston TX, US (IAH)	19,498	↓-2.5%	1,478,355	↓-2.3%
Amsterdam, NL (AMS)	19,275	↓-1.8%	2,380,902	↑1.6%
Toronto ON, CA (YYZ)	18,310	↑0.4%	1,454,453	↑3.7%
Philadelphia PA, US (PHL)	18,143	↓-1.8%	1,210,116	↓-3.2%

(Source: ACI)

Note: Total scheduled and non-scheduled services

### TOP 15 AIRLINES

SEP 2013 +5.2% YoY in terms of RPK for the Top 15

In terms of RPK, all the airlines of the Top 15 posted a positive growth in September 2013 compared to one year ago.

The highest growths of the Top 15 were recorded by Turkish Airlines (+18.1%), followed by Emirates (+14.9%) and by Air China (+11.5%).

This month, Emirates ranks 4<sup>th</sup> of the Top 15, moving up one ranking over American. The Top 3 did not changed compared to last month: United remains 1<sup>st</sup>, Delta is 2<sup>nd</sup> and AF-KLM is 3<sup>rd</sup>.

Ryanair posted a +8.6% year-on-year growth, Lufthansa grew at +5.9%, British Airways grew at +2.4%, while AF-KLM (+0.7%) recorded the lowest growth among the European airlines of the top 15.

Cathay Pacific posted a +3.6% year-on-year increase, the forth month of consecutive positive growth in 2013, coming after 4 quarters of negative growth (Q3 2012 to Q2 2013). LATAM (LAN and TAM)

LATAM (+1.9%) is back in the Top 15, and is the only airline from Latin America/Caribbean.

SEP 13	RPK (billion)				YoY
	5	10	15	20	
United	23.3				↑0.5%
Delta	23.0				↑2.3%
AF-KLM	19.8				↑0.7%
Emirates**	17.8				↑14.9%
American	16.2				↑1.2%
Lufthansa	14.3				↑5.9%
China Southern	12.7				↑9.3%
Southwest	12.6				↑1.3%
Air China	12.3				↑11.5%
British Airways	11.6				↑2.4%
China Eastern	10.3				↑9.7%
Ryanair**	10.3				↑8.6%
Cathay Pacific group	8.4				↑3.6%
Turkish Airlines	8.4				↑18.1%

(Source: ICAO, airlines websites)

Note: Total scheduled and non-scheduled services

### CAPACITY BY REGION (ICAO Statistical Regions)

SEP 2013

All regions showed positive growth in September 2013 compared to one year ago, with a +5.3% increase in capacity worldwide.

The airlines of the Middle East recorded once more the highest growth in September, with a +12.5% growth compared to last year.

Asia/Pacific, the largest region in terms of ASK with 31% of the worldwide capacity, recorded the second highest capacity increase with +8.4% year-on-year.

The worldwide results of September (+5.3%) are better than the year-to-date one (+4.4%) by +0.9 point. With the exception of Latin America/Caribbean, all the regions posted higher growth than their respective year-to-date growth: Asia/Pacific having the more significant difference with +1.8 points.

	SEP 13			YTD		
	ASK (billion)	%	YoY	ASK (billion)	%	YoY
ASIA/PACIFIC	190	31%	↑8.4%	1,694	31%	↑6.6%
EUROPE	174	29%	↑3.2%	1,450	27%	↑2.2%
NORTH AMERICA	144	24%	↑1.8%	1,355	25%	↑1.6%
MIDDLE EAST	53	9%	↑12.5%	477	9%	↑11.5%
LATIN AMERICA/CARIBBEAN	32	5%	↑4.0%	291	5%	↑4.8%
AFRICA	16	3%	↑6.0%	146	3%	↑5.2%
World	608	100%	↑5.3%	5,412	100%	↑4.4%

(Source: ICAO, IATA, OAG)

Note: Total scheduled services

\* Embarked Passengers \*\*Source: OAG and ICAO estimates

ACRONYMS: RPK: Revenue Passenger-Kilometres; ASK: Available Seat-Kilometres; LF: Passenger Load Factor; YoY: Year-on-year; YTD: Year-to-date; OAG: Official Airline Guide; IATA: International Air Transport Association; ACI: Airports Council International; UNWTO: United Nations World Tourism Organization