



<http://www.icao.int/sustainability/Pages/AT-MonthlyMonitor.aspx>

### GLOBAL KEY FIGURES

**AUG 2014**  
(versus AUG 2013)

**RPK** ▲+5.9%    **ASK** ▲+5.5%    **FTK** ▲+5.1%    **LF**: 83.9% ▲+0.5 pts

**OUTLOOK\* - SEP 2014**  
(versus SEP 2013)

**ASK** ▲+6.9%    \* Source OAG

### PASSENGER TRAFFIC

#### Revenue Passenger-Kilometres - RPK

World passenger traffic grew by +5.9% in August 2014 compared to August 2013. This growth is slightly higher than the growth recorded in July 2014 (+5.3%).

Air transport demand remains strong, supported by the improvements in emerging economies and stronger business conditions in the US. Growth of world passenger traffic is expected to continue in the following months.



(Source: ICAO, IATA, OAG)

### CAPACITY

#### Available Seat-Kilometres - ASK

Capacity worldwide increased by +5.5% in August 2014 year-on-year, representing +0.2 percentage points higher than the July capacity growth (+5.3%).

The expansion of capacity is expected to accelerate in September 2014, with an estimated growth rate of +6.9% year-on-year.



(Source: ICAO, IATA, OAG)

### International Traffic

International passenger markets grew strongly by +6.7% in August 2014 compared to the same period last year. This is +1.2 percentage points higher than the year-on-year growth registered in July 2014 (+5.5%).

International tourist arrivals are expected to follow a similar monthly growth trend.

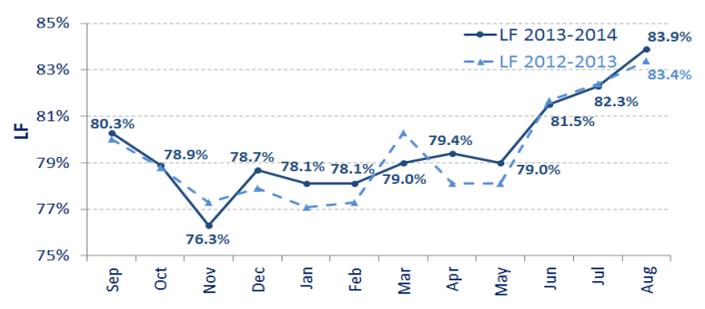


(Source: IATA, UNWTO)

### Load Factor - LF

The passenger Load Factor reached 83.9% in August 2014. This is 0.5 percentage points higher than the 83.4% recorded in August 2013.

LF improved +1.6 percentage points compared to the 82.3% in July 2014. The year-to-date LF for the first eight months of 2014 was 80.3%.



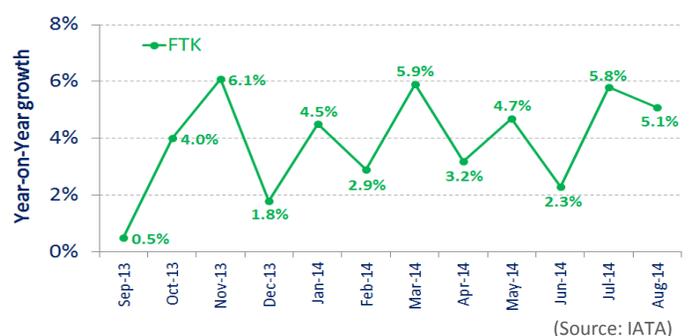
(Source: IATA)

### FREIGHT TRAFFIC

#### Freight Tonne-Kilometres - FTK

World freight traffic grew robustly by +5.1% in August 2014 compared to the same period a year ago, albeit slightly lower than the +5.8% growth recorded in July 2014. Freight Tonne-Kilometres grew at a faster pace than the freight capacity growth (+3.4%) in August 2014.

World freight traffic growth is expected to remain positive for the following months. Trade volumes in emerging markets and in the US have expanded compared to earlier this year, which should support the world air freight traffic growth ahead.



(Source: IATA)

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

AUG 2014: +0.1%, +4.6%, and +4.3% YoY in terms of aircraft departures, passengers and freight for the Top 15

AUG 14

Airports (ranking by number of departures)			Airports (ranking by number of passengers)			Airports (ranking by tonnes of freight)		
Airports	Departures	YoY	Airports	Passengers*	YoY	Airports	Freight**	YoY
Chicago IL, US (ORD)	40,281	↓ -0.4%	Atlanta GA, US (ATL)	4,283,367	↑ 2.6%	Hong Kong, HK (HKG)	366,000	↑ 8.6%
Atlanta GA, US (ATL)	37,624	↓ -6.4%	Beijing, CN (PEK)	3,910,363	↑ 0.7%	Memphis TN, US (MEM)	355,520	↓ -1.4%
Dallas/Fort Worth TX, US (DFW)	29,549	↓ -1.7%	Tokyo, JP (HND)	3,615,991	↑ 6.0%	Shanghai, CN (PVG)	266,049	↑ 12.9%
Los Angeles CA, US (LAX)	28,342	↑ 1.9%	London, GB (LHR)	3,527,049	↑ 1.3%	Anchorage AK, US (ANC)	214,923	↑ 2.5%
Denver CO, US (DEN)	25,460	↓ -1.4%	Los Angeles CA, US (LAX)	3,358,787	↑ 6.1%	Incheon, KR (ICN)	202,343	↑ 4.1%
Beijing, CN (PEK)	25,270	↑ 1.2%	Dubai, AE (DXB)	3,324,029	↑ 10.8%	Dubai, AE (DXB)	192,902	↑ 4.3%
Charlotte NC, US (CLT)	23,601	↓ -2.1%	Chicago IL, US (ORD)	3,311,500	↑ 4.4%	Louisville KY, US (SDF)	180,699	↓ -1.4%
Las Vegas NV, US (LAS)	23,459	↑ 3.0%	Paris, FR (CDG)	3,257,278	↑ 6.2%	Tokyo, JP (NRT)	174,678	↑ 6.0%
Paris, FR (CDG)	22,011	↑ 1.8%	Frankfurt, DE (FRA)	3,056,948	↑ 5.4%	Frankfurt, DE (FRA)	170,979	↑ 3.5%
Houston TX, US (IAH)	21,930	↑ 1.7%	Dallas/Fort Worth TX, US (DFW)	2,893,519	↑ 6.3%	Miami FL, US (MIA)	160,030	↑ 6.8%
Frankfurt, DE (FRA)	21,342	↑ 0.6%	Hong Kong, HK (HKG)	2,885,000	↑ 3.3%	Singapore, SG (SIN)	156,100	↑ 4.2%
Amsterdam, NL (AMS)	21,263	↑ 3.5%	Amsterdam, NL (AMS)	2,809,859	↑ 5.3%	Beijing, CN (PEK)	155,882	↑ 0.0%
London, GB (LHR)	20,698	↓ -0.4%	Istanbul, TR (IST)	2,760,270	↑ 11.0%	Paris, FR (CDG)	150,303	↑ 2.3%
New York NY, US (JFK)	20,527	↑ 7.2%	New York NY, US (JFK)	2,746,952	↑ 8.0%	Los Angeles CA, US (LAX)	148,072	↑ 4.8%
Toronto ON, CA (YYZ)	20,048	↑ 1.3%	Jakarta, ID (CGK)	2,640,275	↓ -4.7%	Taipei, TW (TPE)	139,757	↑ 8.6%

Note: Total scheduled and non-scheduled services

(Source: ACI)

In terms of **aircraft departures**, the Top 15 airports reported a growth of **+0.1%** year-on-year. **Chicago** ranked first, albeit with a decrease of **-0.4%**. **New York** recorded the highest year-on-year growth within the Top 15 by **+7.2%**, followed by **Amsterdam (+3.5%)**, while **Atlanta** posted the largest decrease of **-6.4%**.

In terms of **passengers**, the Top 15 airports reported a growth of **+4.6%** year-on-year. All airports in the Top 15, except for **Jakarta**, posted a year-on-year growth. **Atlanta** ranked first with **+2.6%** increase over August 2013. **Istanbul** recorded the highest growth of the Top 15 by **+11.0%**, followed by **Dubai (+10.8%)**.

In terms of **freight**, the Top 15 airports reported a strong growth of **+4.3%** year-on-year. **Hong Kong** ranked first with a strong year-on-year growth of **+8.6%**. **Shanghai** recorded the highest growth of the Top 15 by **+12.9%**. Two airports in the US, **Memphis** and **Louisville**, posted a decrease of **-1.4%** respectively.

### TOP 15 AIRLINE GROUPS (Ranked by RPK)

AUG 2014: +4.6% YoY in terms of RPK for the Top 15

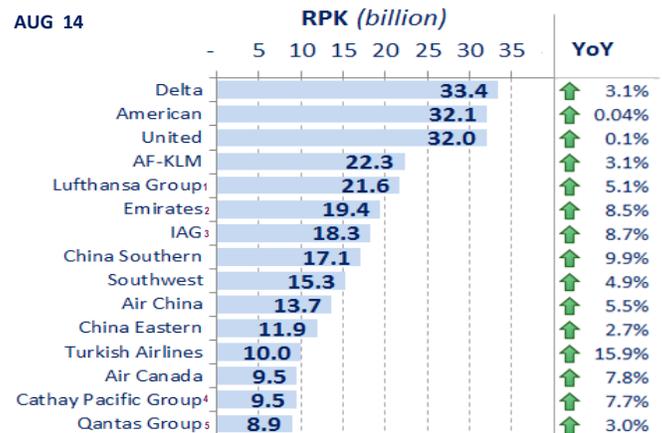
In terms of RPK, the Top 15 airline groups grew by **+4.6%** year-on-year in August 2014. This growth is **-1.3** percentage points lower than the world average on scheduled services. All airline groups in the Top 15 posted a positive growth in RPKs.

With **+3.1%** growth over August 2013, **Delta** ranked over **American** becoming the **first**. **American (+0.04%)** and **United (+0.1%)** ranked second and third, respectively.

For the eighth consecutive month, **Turkish Airlines** recorded the highest year-on-year growth rate of RPK in the Top 15 (**+15.9%**). **Emirates**, the only airline from the Middle East region ranked in the Top 15, grew strongly with by **+8.5%**.

The **Chinese airlines** in the Top 15 recorded a year-on-year growth in RPK. **China Southern** posted the second highest growth within the Top 15 of **+9.9%**. **Air China** and **China Eastern** grew strongly by **+5.5%** and **+2.7%**, respectively.

For the **European airline groups**, **IAG** grew by **+8.7%** year-on-year in RPK, followed by **Lufthansa Group (+5.1%)** and **AF-KLM (+3.1%)**.



(Source: ICAO, airlines' websites)

Note: Total scheduled and non-scheduled services

### CAPACITY BY REGION (ICAO Statistical Regions)

AUG 2014

All regions showed positive growth in capacity in August 2014 compared to last year, with a **+5.5%** increase in capacity worldwide.

**Middle East** recorded the highest capacity increase of **+10.0%** year-on-year. **Asia and Pacific**, the largest region with one third of the worldwide capacity, posted a year-on-year growth of **+7.1%**. **North America** posted the slowest growth of **+1.9%**.

The worldwide result of August 2014 (**+5.5%**) is slightly lower than the YTD 2014 result (**+5.6%**). All regions, except for **Asia and Pacific** and **North America**, posted a higher growth in August than their respective year-to-date growth. **Africa** recorded the most significant difference of **+2.0** percentage points.

#### AFRICAN REGION

**Ebola outbreak** has affected mostly **Guinea, Sierra Leone and Liberia** when airlines started to reduce flights to these States starting from the end of August. Seat capacity offered in and out of these States is expected to decrease by **-48%** in September year-on-year. The impact on global traffic overall is expected to be minimal.

	AUG 14			YTD		
	ASK (billion)	%	YoY	ASK (billion)	%	YoY
Asia and Pacific	219	31%	↑ 7.1%	1,623	32%	↑ 7.7%
Europe	202	29%	↑ 5.8%	1,375	27%	↑ 5.7%
North America	169	24%	↑ 1.9%	1,254	24%	↑ 2.2%
Middle East	62	9%	↑ 10.0%	463	9%	↑ 10.0%
Latin America and the Caribbean	35	5%	↑ 4.3%	270	5%	↑ 3.5%
Africa	19	3%	↑ 5.7%	135	3%	↑ 3.7%
<b>World</b>	<b>706</b>	<b>100%</b>	<b>↑ 5.5%</b>	<b>5,120</b>	<b>100%</b>	<b>↑ 5.6%</b>

(Source: ICAO, IATA, OAG)

Note: Total scheduled services

\* Embarked Passengers \*\* Loaded and Unloaded Freight in Tonnes 1. Lufthansa Group: Lufthansa Airlines, Germanwings, SWISS, Austrian Airlines, Brussels Airlines, Sun Express, and Lufthansa Cargo 2. ICAO estimates 3. IAG: British Airways, Iberia, and Vueling 4. Cathay Pacific Group: Cathay Pacific and Dragonair 5. Qantas Group: Qantas, QantasLink, Jetstar, and Jetstar Asia