

# Media Release

## Passenger Traffic Posts Solid Gains as Air Freight is Revived in October

**Montréal, 9 December 2013** – Airports Council International announced traffic results showing that global passenger traffic continued along its growth path for the month of October increasing by 4.9% from the previous year. With global passenger growth in the realm of 3% year-over-year for the last twelve months, October represented a banner month for passenger traffic as airports in advanced economies bounced back with strong gains heading into the third quarter of 2013.

Since global commerce was very sluggish for most of 2013, the gains in air freight signal a marked improvement in certain markets. The world's airports reported an overall year-over-year gain of 4.1% in air freight traffic for the month of October. The rise in air freight volumes is consistent with the recent improvements in international trade volumes and overall business confidence.

### **Regional Markets: Passengers**

#### ***Africa:***

Africa was the only region to post a year-over-year decline for the month of October dropping by 5.2% in total passenger traffic. Egyptian airports continue to experience the brunt of political unrest. Cairo (CAI), North Africa's busiest airport and entry to major tourist destinations, experienced a decline of 10.8% in passenger numbers. Johannesburg (JNB), continental Africa's busiest airport, declined by 1% as compared to the previous year.

#### ***Asia-Pacific:***

With overall growth of 8% in passenger traffic for the month of October, virtually all of the major hubs in the Asia-Pacific region experienced robust growth rates. International passenger traffic was a driving force behind the gains for the region, growing by almost 10%. While economies such as China face a cyclical slowdown, passenger traffic at Chinese airports remained relatively strong. Seven of the major Chinese airports with over two million passengers for the month of October had a combined 9% increase in passenger traffic.

### ***Europe:***

The performance of air transport demand at European airports is beginning to gain momentum. Except for the peripheral countries of the Euro area, most of the major airports recovered from the weak traffic figures that persisted throughout the year. Of the top twenty airports, only Madrid (MAD), Spain's busiest airport, and Rome (FCO) saw traffic drop by 9.8% and 1.6% respectively in October. At the other end of the spectrum, Turkish airports posted robust growth figures. Both Istanbul (IST) posted growth rates of 9.1% for the month. The region, as a whole, posted gains of 4.3%.

### ***Latin America-Caribbean:***

Latin American airports continue to report buoyant growth in passenger traffic. In particular, the Sao Paulo airports (GRU and CGH) both posted double digit gains of over 10%. In addition to the leading Brazilian airports, Mexico City (MEX), which also serves a large domestic market, posted overall gains of 7.1% in passenger traffic for October.

### ***Middle East:***

The Middle East continues to achieve the highest growth among all regions month after month. For the month of October traffic increased by 10%. Double digit growth rates continue to persist for airports across the region. Dubai (DXB) and Abu Dhabi (AUH) grew by 15.1% and 15.8% respectively.

### ***North America:***

While growth in North America remains at relatively modest levels, passenger traffic posted a gain of 2.8% for month of October. This represents an above average month for North America since year-over-year growth for the last twelve months was in the vicinity of 1%. As compared to other major airports in the region, Los Angeles (LAX) continues to achieve impressive passenger increases as it recorded over 6% for the month of October.

## **Regional Markets: Air Freight**

### ***Africa:***

Johannesburg (JNB), the highest ranking airport in terms of air freight in Africa, had a drop of 13% in freight volumes. Given that the airport handles almost 20% of Africa's global freight volume on an annual basis, JNB's decline contributed to the overall continental decline of 8.1%.

### ***Asia-Pacific:***

The global air freight hubs of Hong Kong (HKG), Shanghai (PVG) and Incheon (ICN), which make up a considerable proportion of traffic in the Asia-Pacific region, had year-over-year increases of 6.1%, 10.7% and 2.5% respectively. This is in stark contrast to previous months where growth was much lower or even in negative territory. The major top ten airports posted gains in freight traffic. The region, as a whole, grew by 4.5% in air freight volumes for the month of October.

### ***Europe:***

European air freight markets posted the strongest gains since the beginning of 2013. While certain major airports continue to experience a decrease in air freight volumes, there was a net gain in volumes, which translated in an increase of 4.2% in air freight traffic. Frankfurt (FRA) led the pack in terms of air freight as volumes increased by 3.4%.

### ***Latin America-Caribbean:***

Two of Latin America's largest air freight hubs, Sao Paulo (GRU) and Mexico City (MEX), contracted by 8.2% and 3.1% respectively. Many airports in the region saw their freight volumes decline in October. Of the ten major air freight airports in Latin-America, five of them were in decline for the month. The region's airports had a collective decline of 2.1%.

### ***Middle East:***

The Middle East posted moderate gains in air freight traffic at 3.3% growth for the month of October. Abu Dhabi, the third ranked airport in terms of freight volume, reported a gain of over 17.9% in freight traffic, whereas Dubai (DXB), the region's leading airport, grew by 3% for the month.

### ***North America:***

Of all regions, North America posted the strongest gains in air freight volumes for the month of October. Traffic grew by 5.1% for the region. Considering that growth in traffic was almost flat for most of 2013, the surge in volumes for the month of October points to a considerable improvement. Three of North America's leading air freight hubs all reported robust increases in freight volumes for the month of October. Memphis (MEM), home of FedEx and the world's second busiest air freight airport, showed a significant increase of 7.6%. Anchorage (ANC) and Louisville (SDF) increased by 5.7% and 6.5% respectively.

ACI World's Economics Director Rafael Echevarne commented, "Macroeconomic indicators point to a continuing recovery in the Euro area and the United States, which are interlinked with the aviation sector. While there is a revived sense of optimism based on the latest traffic figures, it is still early to adopt the view that we are completely out of the woods. Nevertheless, key emerging aviation markets such as Dubai, Istanbul and Sao Paulo continue to post strong gains in passenger traffic in spite of the downside risks. For the month of October, only three out of the top 30 airports reported having a decline in year-over-year passenger traffic."

**TABLE 1: SUMMARY WORLDWIDE TRAFFIC RESULTS, October 2013 (% CHANGE)**

	October 2013 Over October 2012	Year to date 2013	12-month rolling year
<i>PaxFlash</i>			
International passenger	5.9	5.1	4.9
Domestic passenger	4.0	2.2	1.7
Total passenger	4.9	3.6	3.2
<i>FreightFlash</i>			
International freight	4.1	0.1	0.2
Domestic freight	4.2	1.2	0.9
Total freight	4.1	0.4	0.4

+++++

**Notes for editors**

***Airports Council International (ACI), the only worldwide association of airports, has 573 member airport authorities, which operate over 1,751 airports in 174 countries. ACI's mission is to promote professional excellence in airport management and operations, and this mandate is carried out through the organization's multiple training opportunities, as well as the customer service benchmarking program, a wide range of conferences, industry statistical products and best practice publications.***

***PaxFlash and FreightFlash statistics are based on a significant sample of airports that provide regular monthly reports to ACI. They represent approximately 60% of total passenger traffic and 70% of total freight traffic worldwide. Commentary, tables and charts are based on preliminary data submitted by participating airports and are therefore subject to change.***

***Regional results and trend graphics are provided on the following pages.***

***For further information, contact James Roach [JRoach@aci.aero](mailto:JRoach@aci.aero)***

**TABLE 2: PaxFlash Summary – October 2013**

Regions	OCTOBER 2013 % YOY	YTD OCTOBER 2013 % YOY	YE thru OCTOBER 2013 % YOY
<b>International Passengers</b>			
Africa	-7.3	0.2	1.2
Asia-Pacific	9.7	8.7	8.0
Europe	4.7	3.4	3.3
Latin America-Caribbean	5.2	4.6	5.0
Middle East	10.1	11.0	10.7
North America	6.1	3.9	3.9
World	5.9	5.1	4.9
<b>Domestic Passengers</b>			
Africa	-2.7	-2.2	-2.8
Asia-Pacific	7.0	6.5	5.3
Europe	2.9	-1.4	-2.2
Latin America-Caribbean	7.1	3.5	3.3
Middle East			
North America	2.0	0.4	0.4
World	4.0	2.2	1.7
<b>Total Passengers</b>			
Africa	-5.2	0.0	0.4
Asia-Pacific	8.1	7.4	6.3
Europe	4.3	2.3	2.0
Latin America-Caribbean	6.2	3.6	3.6
Middle East	10.0	10.7	10.3
North America	2.8	1.1	1.1
World	4.9	3.6	3.2

**Traffic table definitions:**
**PASSENGER TRAFFIC:** departing + arriving passengers (000s)

**INTERNATIONAL:** traffic performed between the designated airport and an airport in another country/territory

**DOMESTIC:** traffic performed between two airports located in the same country/territory

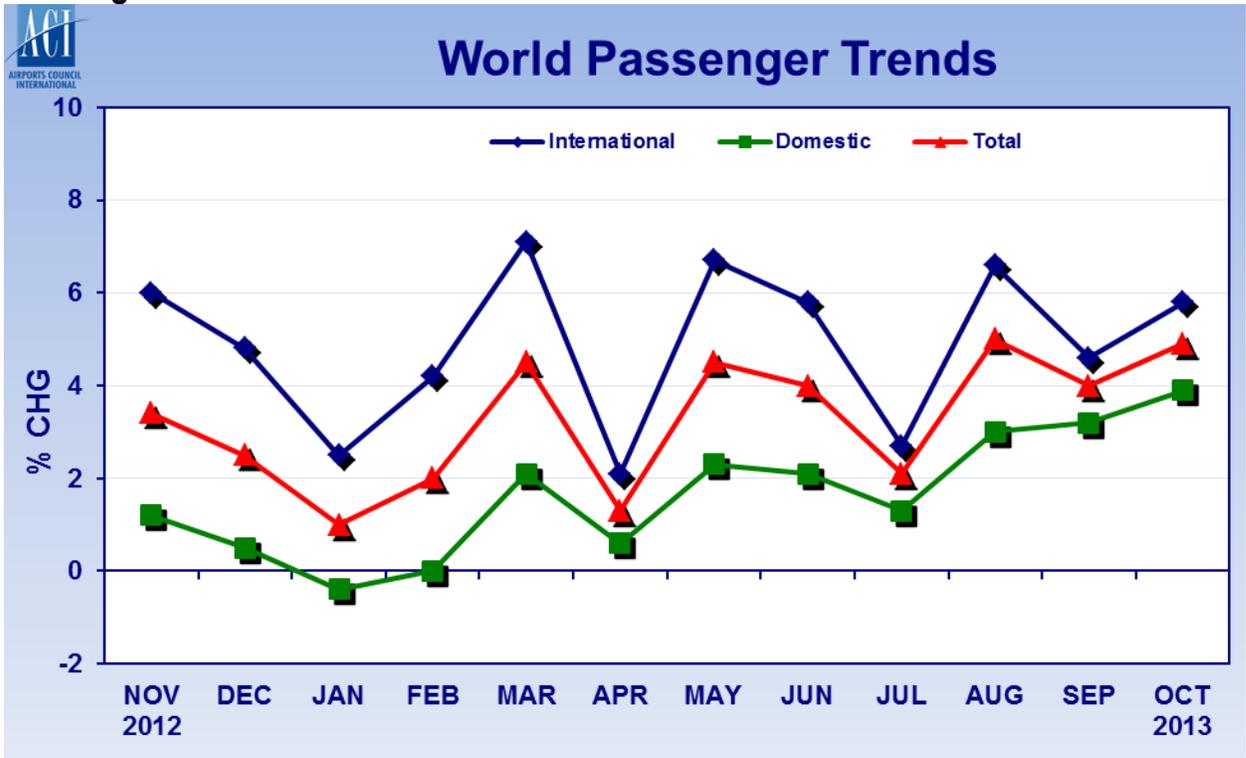
**TOTAL:** international + domestic passengers + direct transit passengers counted once (when breakdown is available)

*Year-over-year percentage changes (% YOY) are calculated from a representative sample.*
**YOY** Year over year same month comparison

**YTD** Year to date, starting January 2013 to October 2013, compared to same period previous year

**YE** Year end, based on rolling 12 month period, compared to same prior 12 month period

## Passenger Traffic Growth Trends



*Month by month comparison with same month previous year*

**TABLE 3: FreightFlash Summary – October 2013**

Regions	OCTOBER 2013 % YOY	YTD OCTOBER 2013 % YOY	YE thru OCTOBER 2013 % YOY
<b>International Freight</b>			
Africa	-10.1	-3.6	-2.9
Asia-Pacific	4.2	-0.9	-0.6
Europe	4.2	0.0	-0.3
Latin America-Caribbean	-0.2	-2.0	-1.9
Middle East	3.3	4.8	4.4
North America	6.7	1.2	1.9
World	4.1	0.1	0.2
<b>Domestic Freight</b>			
Africa	5.3	-5.9	-1.8
Asia-Pacific	5.6	3.2	2.8
Europe	5.6	-0.2	-0.4
Latin America-Caribbean	-5.7	3.5	3.1
Middle East			
North America	4.2	0.1	-0.1
World	4.2	1.2	0.9
<b>Total Freight</b>			
Africa	-8.1	-3.1	-2.4
Asia-Pacific	4.5	0.1	0.3
Europe	4.2	0.0	-0.3
Latin America-Caribbean	-2.1	-0.3	-0.4
Middle East	3.3	4.8	4.3
North America	5.1	0.5	0.6
World	4.1	0.4	0.4

**Traffic table definitions:**

**FREIGHT TRAFFIC:** loaded and unloaded freight; data in metric tonnes

**INTERNATIONAL:** traffic performed between the designated airport and an airport in another country/territory

**DOMESTIC:** traffic performed between two airports located in the same country/territory

**TOTAL:** international + domestic freight (when breakdown is available)

Note: No domestic freight traffic is reported by airports in the Middle East region.

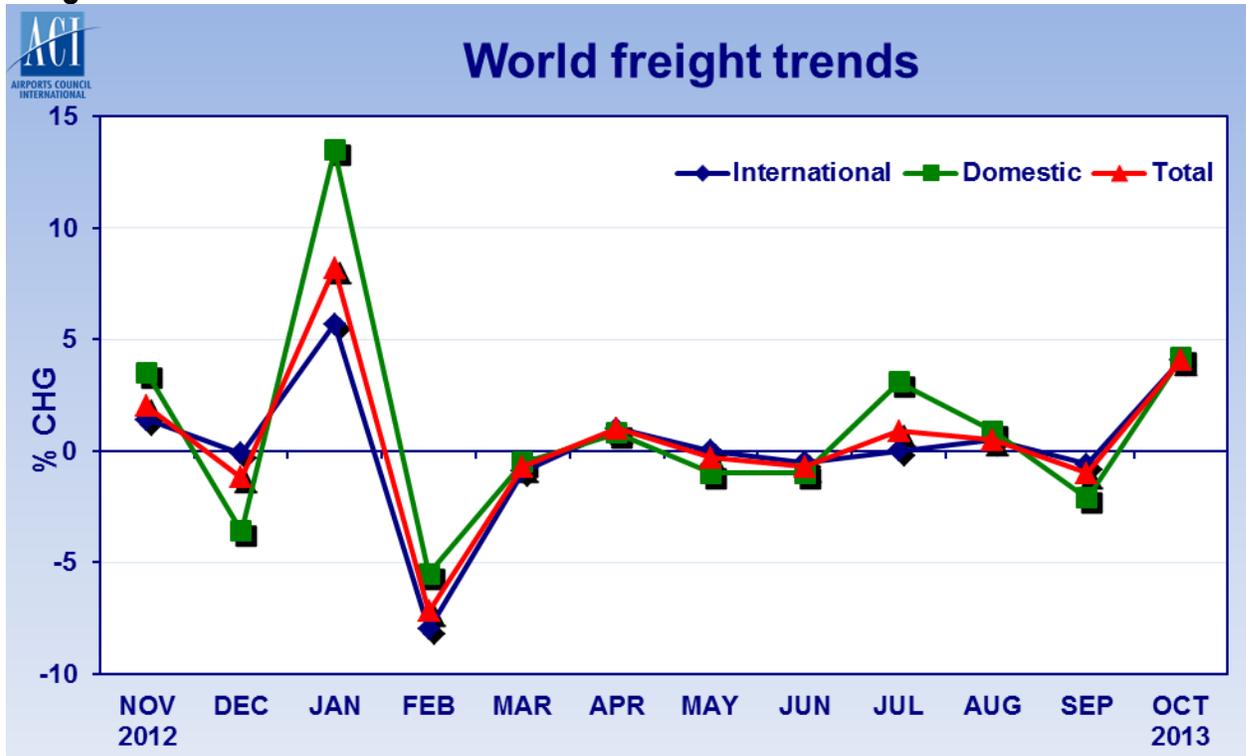
*Year-over-year percentage changes (% YOY) are calculated from a representative sample.*

YOY Year over year same month comparison

YTD Year to date, starting January 2013 to October 2013, compared to same period previous year

YE Year end, based on rolling 12 month period, compared to same prior 12 month period

### Freight Traffic Growth Trends



Month by month comparison with same month previous year

- ENDS -