

Media Release

Passenger Traffic Grows by 4.1% for the Month of September

Montréal, 11 November 2013 – 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.

Air freight, on the other hand, was in negative territory for the month of September with volumes contracting by 1.1%. On an annualized basis, air freight traffic is almost flat with respect to year-over-year increases. The sluggishness of air freight is reflective of the wide-ranging loss in steam in the volume of exports and imports across the globe.

Regional Markets: Passengers

Africa

Egyptian airports continue to experience the repercussions of social and political unrest. Cairo (CAI), North Africa’s busiest airport and gateway to major tourist destinations, witnessed a decline of 17.5% for the month of September. Moving southward, Johannesburg (JNB), continental Africa’s largest airport, in terms of passenger traffic, was almost flat as compared to the previous year. On the whole, Africa endured a decline of over 7% in passenger traffic.

Asia-Pacific

The Asia-Pacific region continues to experience buoyant growth rates in international passenger traffic, with the region observing an increase of 11.2% for the month of September. Hong Kong (HKG), the region’s busiest airport in terms of international passenger traffic, observed a rise of 9.7% in international passenger numbers. Beijing (PEK), on the other hand, which serves a domestic market of over 66 million passengers on an annual basis, had almost no change in domestic passenger traffic numbers. Overall passenger traffic, which combines both domestic and international markets, grew by 8.6% for the Asia-Pacific region.

Europe

As the euro area endures a lacklustre recovery in economic output, growth in passenger traffic is restrained at European airports relative to other world regions. While results are mixed across airports, passenger traffic grew by 2.8% for Europe as a whole. Airports in economies that were gravely affected by the euro area crisis continue to experience year-over-year declines. Madrid (MAD), Spain's busiest airport, saw traffic drop by 11.5% in September. At the other end of the spectrum, Turkish airports posted robust growth figures, with Istanbul (IST) and Antalya (AYT) increasing by 8% for the month.

Latin America-Caribbean

Airports in Latin America continue to exhibit strong growth rates in passenger traffic. In September passenger figures grew by 6.3%. Over a twelve month period, growth was in the realm of 5% year-over-year. In addition to leading Brazilian airports, Mexico City (MEX) and Bogota (BOG) have burgeoning domestic markets with overall passenger traffic growing by 8.6% and 9% respectively for September.

Middle East

The Middle East achieved the highest growth among all regions for the month of September at 8.9%. Double digit growth rates continue to persist for airports across the region. Dubai (DXB), Tel-Aviv (TLV) and Abu Dhabi (AUH) grew by 13.1%, 12.4% and 10.1% respectively.

North America

Growth in North America remains at relatively modest levels. September passenger traffic rose by 1.6%, which was in line with overall forecasts and expectations. As compared to other major airports in the region, Los Angeles (LAX) has achieved relatively high growth of 5%. The airport has seen a sharp rise of passengers in transit (passengers who arrive at and depart from the airport on a flight bearing the same number). While transit passengers represent a small proportion of traffic, the airport experienced triple digit increases in this traffic for the month of September.

Regional Markets: Air Freight

Africa

Johannesburg (JNB), the highest ranking airport in terms of air freight in Africa, had a drop of almost 12% in freight volumes in September. Since 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 5.2%.

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 declines of 0.8%, 3.5% and 4.1% respectively. Among the major airports in Asia-Pacific, only the Japanese airports attained positive gains. Narita (NRT) and Haneda (HND), two airports serving Tokyo, had growth of 2.2% and 5.7% respectively.

Europe

Year-over-year growth results were relatively mixed across European airports. In summary, there was almost no change in volumes of freight as compared to September 2012. Frankfurt's (FRA) growth was almost flat. Whereas Charles De Gaulle-Paris (CDG) and Heathrow-London (LHR) were in decline at 7.4% and 4.6% respectively, Amsterdam (AMS) and Leipzig (LEJ) posted growth numbers of 3.9% and 2.8%.

Latin America-Caribbean

Many airports in the region saw their freight volumes in decline for the month of September. Of the ten major air freight airports in Latin-America, eight of them were in decline for the month, with Mexico City (MEX), one of the region's largest airports, dropping by 5.8%.

Middle East

The Middle East was the only region to post moderate gains in air freight traffic at 2.9% growth for the month of September. Abu Dhabi, the third ranked airport in terms of freight volume, reported a gain of over 27% in freight traffic for the month.

North America:

Three of North America's leading air freight hubs all reported a drop in freight volumes for the month of September. Memphis (MEM), home of FedEx and the world's second busiest air freight airport, showed a slight decline of 0.8%. Anchorage (ANC) and Louisville (SDF) decreased by 11.2% and 2.4% respectively.

ACI World's Economics Director Rafael Echevarne commented, "With the slowdown in economic growth in both advanced economies and emerging markets, particularly with respect to China, it's not surprising to see the uniform slowdown in air freight in these markets. Conversely, passenger traffic, has demonstrated a greater level of immunity to the downside risk exposure in the global economy and emerging markets. Although certain markets continue to operate in an environment of persistent economic uncertainty, particularly with regards to the Euro area and North America, the budding middle class in many emerging markets acts to offset the slowdown in these other economies."

TABLE 1: SUMMARY WORLDWIDE TRAFFIC RESULTS, September 2013 (% CHANGE)			
	September 2013 over September 2012	Year to Date 2013	12-Month Rolling Year
<i>PaxFlash</i>			
International passenger	4.8	5.0	4.7
Domestic passenger	3.3	2.2	1.6
Total passenger	4.1	3.5	3.1
<i>FreightFlash</i>			
International freight	-0.6	-0.4	-0.3
Domestic freight	-2.2	0.2	0.2
Total freight	-1.1	-0.2	-0.2

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Notes for editors

1. 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.

2. 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.

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

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TABLE 2: PaxFlash Summary – September 2013

Regions	SEPTEMBER 2013 % YOY	YTD SEPTEMBER 2013 % YOY	YE thru SEPTEMBER 2013 % YOY
International Passengers			
Africa	-10.7	1.1	2.3
Asia-Pacific	11.2	8.5	7.6
Europe	3.2	3.3	3.0
Latin America-Caribbean	5.4	4.0	4.6
Middle East	9.3	11.2	11.0
North America	3.3	3.6	3.6
World	4.8	5.0	4.7
Domestic Passengers			
Africa	-2.7	-1.8	-2.6
Asia-Pacific	7.0	6.3	4.7
Europe	1.4	-1.9	-2.7
Latin America-Caribbean	7.1	5.5	5.7
Middle East			
North America	1.0	0.2	0.2
World	3.3	2.2	1.6
Total Passengers			
Africa	-7.2	0.8	1.2
Asia-Pacific	8.6	7.2	5.9
Europe	2.8	2.1	1.7
Latin America-Caribbean	6.3	4.7	5.0
Middle East	8.9	10.8	10.6
North America	1.6	0.9	0.9
World	4.1	3.5	3.1

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

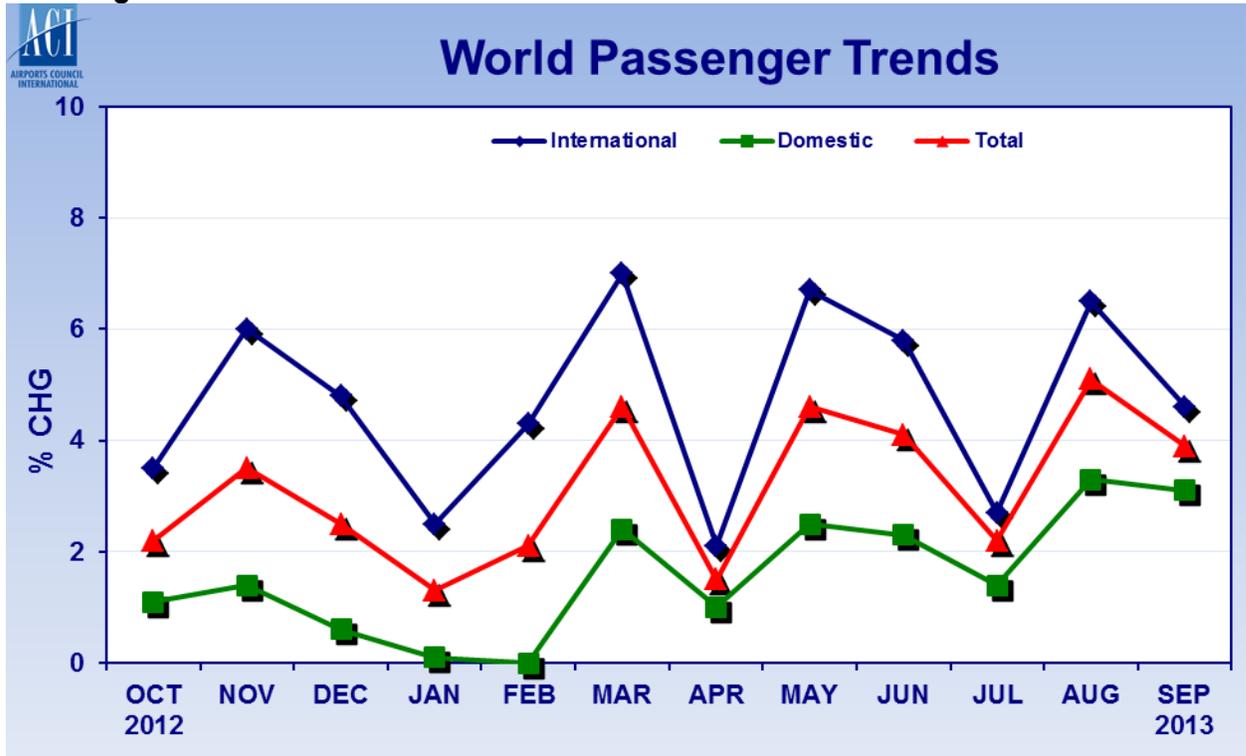
TOTAL: international + domestic passengers + direct transit passengers counted once (when breakdown is available)

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 September 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 – September 2013

Regions	SEPTEMBER 2013 % YOY	YTD SEPTEMBER 2013 % YOY	YE thru SEPTEMBER 2013 % YOY
International Freight			
Africa	-6.2	-1.5	-0.8
Asia-Pacific	-2.1	-1.5	-1.1
Europe	0.3	-0.4	-1.0
Latin America-Caribbean	-3.5	-2.6	-2.7
Middle East	2.9	4.8	3.9
North America	0.8	0.6	1.3
World	-0.6	-0.4	-0.3
Domestic Freight			
Africa	0.1	-7.1	-3.8
Asia-Pacific	-0.6	1.8	1.4
Europe	2.5	-0.8	-0.6
Latin America-Caribbean	-3.1	-1.2	0.9
Middle East			
North America	-3.3	-0.4	-0.3
World	-2.2	0.2	0.2
Total Freight			
Africa	-5.2	-1.4	-0.7
Asia-Pacific	-1.7	-0.8	-0.5
Europe	0.4	-0.5	-0.9
Latin America-Caribbean	-3.4	-2.2	-1.7
Middle East	2.9	4.8	3.9
North America	-1.6	0.0	0.3
World	-1.1	-0.2	-0.2

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)

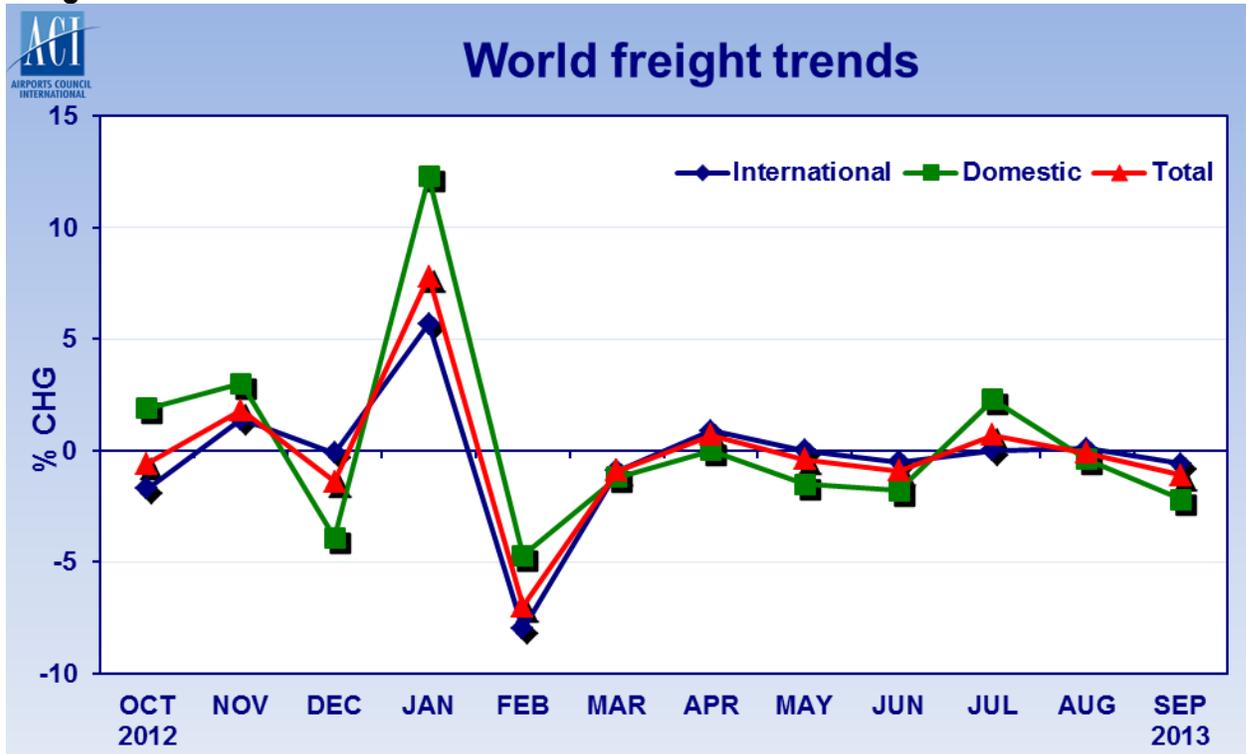
Note: No domestic freight traffic is reported by airports in the Middle East region.

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 September 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

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