

Media Release

Airport traffic: flat growth in 2008 Industry destabilized by high oil and financial market meltdown

Geneva, 27 July 2009 – A record number of 1357 airports, representing approximately 98 percent of global airport traffic, contributed to the 2008 World Airport Traffic Report, released this week. The total number of arriving and departing passengers rose to 4.874 billion passengers, compared to 4.869 billion in 2007, for a marginal growth of 0.1 percent for the year. International passenger traffic, which accounts for 42 percent of global traffic, was up by 2.4 percent for the year as compared to a decline of 1.4 percent in domestic traffic.

ACI World Director General Angela Gittens comments, “With overall passenger numbers hovering at 4.8 billion in both 2007 and 2008, we are a long way from the dynamic 6.8 percent growth witnessed in 2007. The relentless climb of oil prices which spiked in July and the turbulent financial and economic climate, which emerged in the second half of 2008, countered positive results achieved in first two quarters of the year. These two key factors sparked a negative trend that has continued into 2009.”

Cargo results

Global industrial production began to contract in July 2008 followed by a sharp drop in global trade volumes in the last quarter leading to a collapse in global air freight peaking in December 2008. As a result cargo volumes worldwide fell by 3.7 percent in 2008. Domestic freight dropped more sharply by 5.4 percent whereas international freight suffered from a milder 2.4 percent contraction.

Looking at some key markets, for the year, the Asia Pacific region lost 25% of its previous year volume in December. The U.S. remained by far the largest air cargo market in the world accounting for a third of the global volume even though it shrank by 9.1 percent both in domestic and international freight. China (including Hong Kong) ranked second accounting for 13 percent of global air shipments. Total freight in China grew by 1.8 percent, with almost equal growth levels in the domestic and international markets.

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Gittens comments, "The downward spiral for cargo year-end has yet to be reversed, with cargo results tied down by the slow resurgence of global trade. Traffic results for the first half of 2009 show that freight remains strongly depressed relative to the first quarter of 2008, with only timid indications of market stabilization beginning to emerge."

Aircraft movements

Aircraft movements worldwide reached 77 million, which given the larger sample this year actually represents a decline of 2.1 percent compared to 2007. This figure includes cargo, military, general aviation, combi flights and passenger aircraft movements. Passenger/combi aircraft movements – a category of particular interest for commercial purposes – decreased by 0.5 percent to 55.8 million. That translates into 87.3 passengers per movement, which is actually an improvement of 0.7 percent over 2007.

The largest decrease of passenger/ combi aircraft movements was registered in the U.S., down by 4.2 percent. General Aviation and military flights in the U.S. were down by 10.7 percent.

2008 AIRPORT* TRAFFIC SUMMARY

ACI Stats by Region	Total Aircraft Movements	% Chg	Total Passengers	% Chg	Total Cargo	% Chg
Africa	2 734 308	3.0	148 472 213	4.9	2 126 122	5.7
Asia Pacific	11 225 784	2.5	1 163 899 072	1.2	29 068 256	(1.7)
Europe	20 900 662	(0.3)	1 509 352 088	1.2	17 516 425	(1.0)
Latin America-Caribbean	7 246 496	1.9	352 849 611	2.1	4 589 092	(4.2)
Middle East	1 636 053	4.5	152 590 727	5.8	4 267 979	1.6
North America	33 225 182	(6.0)	1 546 831 028	(3.1)	28 510 866	(8.4)
ACI total worldwide	76 968 485	(2.1)	4 873 994 739	0.1	86 078 739	(3.7)

* AIRPORTS PARTICIPATING IN THE ACI 2008 TRAFFIC STATISTICS COLLECTION

By region: Africa 172, Asia Pacific 185, Europe 486, Latin America & Caribbean 254, Middle East 50, North America 210

Passengers: total passengers enplaned and deplaned, passengers in transit counted once.

Cargo: loaded and unloaded freight and mail.

Aircraft Movements: landing and take-off of an aircraft.

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Regional analysis

The impact of crude oil prices on the industry and of the global financial economic recession on production and trade varied by geographical region. North America, particularly susceptible to high oil prices as oil is trading in US Dollars, suffered traffic declines as early as the close of the first quarter. Other regions registered declines later in the year – Asia Pacific starting in July, while Europe and Latin America followed in September. Africa had only two negative months during the year (September and December), whereas the Middle East sustained its growth trajectory during the 12 months.

Due to its early contraction in 2008, North America was the only region with negative overall result in 2008 (-3.1 percent). The Middle East was the region registering the largest growth at 5.8 percent followed by Africa at 4.8 percent.

The 5 fastest growing passenger airports in 2008 were Abu Dhabi (UAE), Istanbul (Turkey), Sharjah (UAE), Sharm El Sheikh (Egypt) and Bahrain (Bahrain). The top 25 includes airports from Brazil, China, Egypt, Indonesia, Italy, Mexico, New Zealand, Nigeria, Peru, Russian Federation, Spain, Turkey, Ukraine, Vietnam – a mixed list from large and small airports, developed and developing nations. See the table at the end of the release.

Andreas Schimm, ACI World's Director of Economics Director and editor of the report, says, "Historically, air traffic tends to outperform GDP, but that was not the case in 2008. This year there is a significant gap, with worldwide growth traffic at 0.1 percent, whereas worldwide GDP grew by 3.1 percent, thanks to a strong 6 percent rise in GDP in emerging/developing economies. With advanced economies generating about 75% of global traffic and sub-GDP traffic growth in some key emerging markets, the disparity was accentuated. In China, GDP rose by 9 percent, yet traffic was only up 3.8 percent; Brazil's GDP rose by 5.1 percent with traffic up by only 0.9 percent; India's GDP was up by 7.3 percent, with traffic down by 2.3 percent."

Notes to editors:

- Media representatives can contact Nancy Gautier at ngautier@aci.aero for the executive summary and top 100 rankings in each of five categories (world passenger traffic, world cargo traffic, aircraft movements, international passenger traffic, and international freight).

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- ACI, the only worldwide association of airports, is a non-profit organisation whose prime purpose is to represent the interests of airports and to promote professional excellence in airport management and operations. ACI has 597 members who operate 1679 airports in 177 countries and territories.
- The full 500-page report includes data for each participating airport. It is available in PDF or Excel format, and can be purchased on-line from ACI World website at www.aci.aero in the publication section.
- GDP values are from the IMF (International Monetary Fund)
- The WATR 2008 (over 600 pages) includes: summary analysis, country by country traffic data, market share for top 50, world rankings in five categories, data from each participating airport, and trend graphs.
- **2008 headline figures**
 - Total worldwide passenger growth of +0.1%
 - Fastest growing region was the Middle East at 5.8% followed by Africa (+4.9%) and Latin America Caribbean (+2.1%)
 - Asia Pacific and Europe grew by 1.2%
 - North America only region with decrease in traffic (-3.1%)

Total aircraft movements handled by airports was 77 billion, a decrease of 2.1%

Total cargo handled decreased by 3.7% to 86 million tonnes

51% of airports worldwide registered positive passenger growth in 2008, together these airports represent 49% of total passenger traffic

520 airports with more than 5 million passengers experienced a decrease in passengers compared to only 21 airports in 2007

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ADDITIONAL TABLES AND COMMENTARY

BUSIEST AIRPORTS – TOTAL PASSENGERS

WORLD AIRPORT RANKING BY TOTAL PASSENGERS				
RANK	CITY	CODE	TOTAL PASSENGERS	% CHG
1	ATLANTA GA	ATL	90 039 280	0.7
2	CHICAGO IL	ORD	69 353 876	(9.0)
3	LONDON	LHR	67 056 379	(1.5)
4	TOKYO	HND	66 754 829	(0.2)
5	PARIS	CDG	60 874 681	1.6
6	LOS ANGELES CA	LAX	59 497 539	(4.7)
7	DALLAS/FORT WORTH TX	DFW	57 093 187	(4.5)
8	BEIJING	PEK	55 937 289	4.4
9	FRANKFURT	FRA	53 467 450	(1.3)
10	DENVER CO	DEN	51 245 334	2.8

BUSIEST AIRPORTS – INTERNATIONAL PASSENGERS

WORLD AIRPORT* RANKING BY INTERNATIONAL PASSENGERS				
RANK	CITY	CODE	INTERNATIONAL PASSENGERS	% CHG
1	LONDON	LHR	61 345 549	(1.2)
2	PARIS	CDG	55 825 413	1.7
3	AMSTERDAM	AMS	47 349 392	(0.7)
4	HONG KONG	HKG	47 140 600	1.8
5	FRANKFURT	FRA	46 707 577	(0.8)
6	DUBAI	DXB	36 592 307	9.3
7	SINGAPORE	SIN	36 288 050	3.0
8	TOKYO	NRT	32 323 947	(5.6)
9	LONDON	LGW	30 433 937	(2.3)
10	BANGKOK	BKK	30 103 661	(4.8)

* includes only airports reporting international/domestic breakdown for 2008 and 2007.

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BUSIEST AIRPORTS – CARGO (FREIGHT AND MAIL)

WORLD AIRPORT RANKING BY TOTAL CARGO (in metric tonnes)				
RANK	CITY	CODE	TOTAL CARGO	% CHG
1	MEMPHIS TN	MEM	3 695 438	(3.8)
2	HONG KONG	HKG	3 660 901	(3.0)
3	SHANGHAI	PVG	2 602 916	1.7
4	INCHEON	ICN	2 423 717	(5.2)
5	ANCHORAGE AK*	ANC	2 339 831	(17.2)
6	PARIS	CDG	2 280 050	(0.8)
7	FRANKFURT	FRA	2 111 031	(2.7)
8	TOKYO	NRT	2 100 448	(6.8)
9	LOUISVILLE KY	SDF	1 974 276	(5.0)
10	SINGAPORE	SIN	1 883 894	(1.8)

BUSIEST AIRPORTS – INTERNATIONAL FREIGHT (MAIL NOT INCLUDED)

WORLD AIRPORT* RANKING BY INTERNATIONAL FREIGHT (in metric tonnes)				
RANK	CITY (AIRPORT)	CODE	INTERNATIONAL FREIGHT	% CHG
1	HONG KONG	HKG	3 627 225	(3.1)
2	INCHEON	ICN	2 386 472	(5.4)
3	TOKYO	NRT	2 058 633	(6.9)
4	PARIS	CDG	2 010 070	0.8
5	FRANKFURT	FRA	1 962 706	(3.3)
6	SHANGHAI	PVG	1 915 864	5.0
7	SINGAPORE	SIN	1 856 939	(2.0)
8	DUBAI	DXB	1 740 575	9.4
9	AMSTERDAM	AMS	1 567 712	(2.6)
10	MIAMI FL	MIA	1 543 602	(4.2)

* includes only airports with international/domestic breakdown for 2008 and 2007.

** includes transit freight

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BUSIEST AIRPORTS – AIRCRAFT MOVEMENTS

WORLD AIRPORT* RANKING BY AIR TRANSPORT MOVEMENTS				
RANK	CITY	CODE	AIR TRANSPORT MOVEMENTS	% CHG
1	ATLANTA GA	ATL	981 402	1.6
2	CHICAGO IL	ORD	828 663	(2.3)
3	DALLAS/FORT WORTH TX	DFW	679 092	(2.0)
4	DENVER CO	DEN	584 507	3.4
5	PARIS	CDG	543 810	2.0
6	LAS VEGAS NV	LAS	527 496	(2.0)
7	HOUSTON TX	IAH	527 422	0.3
8	LOS ANGELES CA	LAX	512 805	0.2
9	CHARLOTTE NC	CLT	488 817	2.9
10	FRANKFURT	FRA	485 915	0.7

* includes only airports with passenger and combi/ all-cargo aircraft movements breakdown for 2008 and 2007.

SIZE CATEGORIES PASSENGER TRAFFIC GROWTH

- Airports with over 40 million passengers declined by 1.6 percent
- Airports with 25-40 million passengers increased marginally by 0.3 percent
- Airports with 15 -25 million passengers declined 1.1 percent
- Airports with 5-15 million passengers increased by 1.2 percent
- Airports with less than 15 million passengers increased by just over 1%

Commentary

Airports in the top three categories (airports with over 15 million passengers) account for 56% of global traffic.

The airports in the over 40 million category are located in North America (8), Europe (5) and Asia Pacific (3). In this category, only Beijing, Paris and Denver had notable growth.

Istanbul is the only new airport to move into the category between 25 and 40 million, with a growth of 23%. Both Dubai (+9%) and Guangzhou (+8%) reported solid growth.

For airports with 15-25 million passengers, U.S. airports contributed most critically to the overall decline of the category as they lost 5.2 percent of traffic.

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The 5-15 million category remains by far the largest in terms of passengers handled (1.2 billion). This category has grown by 5% in Asia Pacific where performance is dominated by Chinese airports. The Asia Pacific region also comprises the most airports and most passengers for this category. Increases in Europe and Latin America Caribbean were more moderate at around 1.5%, whereas this category declined in the U.S. by 5 percent. Abu Dhabi is leading this category in terms of growth as it jumped by 30 percent followed by Sharjah (+22%).

There are 1134 airports with less than 5 million passengers. Airports in this category represent 82 percent of the whole sample, yet they only account for 19 percent of global traffic with an average size of 813,000 passengers.

TOP 25 FASTEST GROWING AIRPORTS 2008				
RANK	CITY/COUNTRY/CODE	CODE	Passengers	% CHG
1	ABU DHABI, UNITED ARAB EMIRATES	AUH	9 016 900	30.2
2	ISTANBUL, TURKEY	IST	28 625 269	23.0
3	SHARJAH, UNITED ARAB EMIRATES	SHJ	5 280 445	22.1
4	SHARM EL SHEIKH, EGYPT	SSH	7 747 422	20.8
5	BAHRAIN, BAHRAIN	BAH	8 758 068	19.6
6	ZHENGZHOU, CHINA	CGO	5 887 598	17.7
7	KIEV, UKRAINE	KBP	6 664 949	17.5
8	MOSCOW, RUSSIAN FEDERATION	VKO	7 922 416	16.7
9	LAGOS, NIGERIA	LOS	5 184 354	16.1
10	ST PETERSBURG, RUSSIAN FEDERATION	LED	7 071 537	15.2
11	ANKARA, TURKEY	ESB	5 801 970	14.6
12	CAIRO, EGYPT	CAI	14 360 029	14.2
13	HO CHI MINH CITY, VIETNAM	SGN	11 725 833	14.0
14	DENPASAR BALI, INDONESIA	DPS	6 691 639	13.6
15	GIRONA, SPAIN	GRO	5 488 911	13.6
16	HURGHADA, EGYPT	HRG	6 741 017	13.4
17	HAIKOU, CHINA	HAK	8 221 997	13.2
18	SANYA, CHINA	SYX	6 006 300	13.1
19	MILAN, ITALY	BGY	6 478 716	12.9
20	DALIAN, CHINA	DLC	8 205 817	12.7
21	WELLINGTON, NEW ZEALAND	WLG	5 370 510	12.3
22	CANCUN, MEXICO	CUN	12 786 423	11.3
23	BELO HORIZONTE, BRAZIL	CNF	5 012 790	10.9
24	NANJING, CHINA	NKG	8 880 565	10.5
25	LIMA, PERU	LIM	8 285 688	10.4

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