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ACI releases World Airport Traffic Report 2009

- Passenger traffic growth down 2 percent; hard hit cargo down by 8 percent -

Geneva, 5 August 2010 – Director General of ACI World, Angela Gittens announced today the publication of ACI's **World Airport Traffic Report for 2009** – the most comprehensive source of global airport traffic data available on the market.

Gittens says, "This is a unique airport industry reference product that provides an analytical review of traffic data for over 1350 airports, with illustrative charts and tables. Against the background of the worst global recession since the Second World War, total global passenger traffic at airports declined by 1.8 percent in 2009 relative to 2008. Cargo tonnage fell by 7.9 percent, reflecting the direct impact on global markets and productivity during the severe economic downturn. We explain the underlying reasons for the traffic results and show how the trends evolved over the year."

Headline results summary

- Worldwide airport passenger numbers dropped by 1.8% in 2009 to 4.796 billion, from a high of 4.882 billion in 2008.
- Middle East (+7.7%), Asia-Pacific (+4.9%) and Latin America-Caribbean (+1.5%) maintained growth.
- Europe and North America registered significant decreases of 5.4% and 5.2% respectively followed by Africa (-0.6%)
- Worldwide domestic traffic was flat (-0.2%) while international traffic dropped 3.9%
- Worldwide aircraft movements decreased by 5.1% to 74.1 million
- Total cargo volumes handled by airports fell by 7.9% to 79.8 million tonnes
- 38% of airports worldwide registered passenger growth, at an average of 10.2%. The gaining airports represent 31.7% of worldwide traffic

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- 62% of airports worldwide lost traffic, at an average rate of 6.5% representing 68.3% of global passengers
- Two thirds of airports with over 5 million passengers (147) lost traffic in 2009 at an average rate of -5.6%

Commenting on the headline results, Gittens says, “In 2009, we witnessed two quite different semesters. During the first half of the year, overall traffic continued to spiral downwards due to the impact of deepening economic uncertainty, falling industrial production and falling GDP. Exceptional factors such as the H1N1 influenza virus pandemic had an adverse impact on traffic in May and June, reaching beyond the borders of Latin America to North America, Asia Pacific and Europe.

“The mid-year months ushered in the glimmer of a rebound, with traffic losses slowing and even stabilizing in a few key developing markets. Domestic traffic in emerging markets began to exhibit new expansion, not just a positive comparison to past poor performance, in part thanks to government stimulus packages that were boosting industrial output and economic stability. China, Brazil and India were leaders in this trend. As is often the case, domestic traffic is a precursor of returning international traffic and that is what we saw in the third quarter, with general improvements in almost all markets.

“The end result for the year was that, despite the tremendous hit the industry took in the first term, renewed passenger traffic growth balanced out those losses and yielded a decline of 1.8 percent for the full year. At the same time, the 5.1 percent drop in aircraft movements indicates the extent to which airlines dropped routes and trimmed excessive capacity in an effort to stabilize their service offerings.

“Cargo fared less well in 2009. The vertiginous drops in freight traffic seen in the first months of the year provided a clear sign of global economic stress. The reversal of that downward spiral later in the year could not make up for such steep losses. As a result, traffic for the year dropped by an average of 7.9 percent.”

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International cargo accounted for 63% of the total cargo volume and shrank by 9.5%; domestic cargo, accounting for 37% of total cargo volume, dropped by 6%. Memphis, USA remains by far the largest domestic cargo hub in the world followed by Louisville, USA. Despite a 7.5% fall, Hong Kong remains the world's largest international cargo hub followed by Incheon, Korea (-5%). Dubai has grown by 6% catapulting it to rank 3, up five ranks from 2008.

2009 AIRPORT* TRAFFIC SUMMARY

ACI Stats Regions	Total Aircraft Movements	% Chg	Total Passengers	% Chg	Total Cargo	% Chg
AFR	2 669 215	(5.5)	150 593 057	(0.6)	1 944 332	(9.1)
ASP	11 502 934	1.8	1 218 573 255	4.9	27 700 660	(4.3)
EUR	19 388 527	(6.6)	1 408 493 435	(5.4)	15 445 874	(10.9)
LAC	7 407 734	(0.5)	368 732 449	1.5	4 178 973	(11.4)
MEA	1 829 995	4.4	183 486 659	7.7	5 144 183	4.3
NAM	31 339 214	(7.9)	1 466 589 370	(5.2)	25 403 389	(11.1)
ACI	74 137 619	(5.1)	4 796 468 225	(1.8)	79 817 412	(7.9)

*** AIRPORTS PARTICIPATING IN THE ACI 2009 TRAFFIC STATISTICS COLLECTION BY REGION:**
Africa (AFR) 176; Asia-Pacific (ASP) 185; Europe (EUR) 459; Latin America-Caribbean (LAC) 269;
Middle East (MEA) 53; North America (NAM) 212; total 1354

N.B. One airport (Mascara, Algeria MUW) provided aircraft movement data for 2009, with no comparison to 2008, and as such is included in the overall ranking but not in the year over year comparison; rankings total 1355.

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.

Commenting on regional differences, Gittens says, "Passenger numbers by region show a clear disparity between two groupings: growing traffic in Asia-Pacific, Latin America-Caribbean, and Middle East on the one hand, and losses in the African, European and North American markets on the other. While the Middle East continued to gain market share in the international sector throughout the year, Asia-Pacific and Latin America-Caribbean were cushioned by robust demand for domestic air travel."

The traffic drops in the first quarter were the deepest in Europe and North America and their recovery trajectory was shallow showing patchy growth in the fourth quarter. Africa

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experienced a smaller drop in traffic with stronger recovery signs. Latin America-Caribbean struggled with the fallout of the H1N1 outbreak over the summer which hampered underlying stronger growth, while Asia-Pacific emerged definitively from the crisis in the second half of the year.

Notes to editors:

- 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. In 2009, ACI had 575 members operating over 1630 airports in 179 countries and territories.
- The **World Airport Traffic Report 2009** (WATR 2009) is the most comprehensive source of airport traffic data on the market. Based on input from 1354 commercial airports from 171 countries, data is presented in five key global traffic categories: total passenger, total cargo, aircraft movements, international passenger and international freight. Rankings by order of busiest airports in each category are provided. The tome also groups results region-by-region, country-by-country, as well as airport-by-airport.
- This release includes the Top 10 ranking of airports by category, with growth percentages compared to 2008, as well as the list of the 25 fastest growing airports. An abridged version of the report's executive summary and the top 100 listings for the main categories are available on request. Media representatives should contact Nancy Gautier at ngautier@aci.aero for any queries or to arrange interviews with Andreas Schimm, ACI Director of Economics, who authored the report.
- ACI produces a full range of publications covering airport policies/standards, monthly and yearly traffic reports, airport economics and global traffic forecasting. The WATR 2009, and previous editions, can be purchased on the ACI website www.aci.aero/publications

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BUSIEST AIRPORTS – TOTAL PASSENGERS

WORLD AIRPORT RANKING BY TOTAL PASSENGERS				
Total Passengers: arriving and departing passengers; direct transit passengers counted once.				
RANK	CITY	CODE	TOTAL PASSENGERS	% CHG
1	ATLANTA GA	ATL	88 032 086	(2.2)
2	LONDON	LHR	66 037 578	(1.5)
3	BEIJING	PEK	65 372 012	16.9
4	CHICAGO IL	ORD	64 158 343	(6.1)
5	TOKYO	HND	61 903 656	(7.2)
6	PARIS	CDG	57 906 866	(4.9)
7	LOS ANGELES CA	LAX	56 520 843	(5.5)
8	DALLAS/FORT WORTH TX	DFW	56 030 457	(1.9)
9	FRANKFURT	FRA	50 932 840	(4.7)
10	DENVER CO	DEN	50 167 485	(2.1)

BUSIEST AIRPORTS – INTERNATIONAL PASSENGERS

WORLD AIRPORT RANKING BY INTERNATIONAL PASSENGERS				
RANK	CITY	CODE	INTERNATIONAL PASSENGERS	% CHG
1	LONDON	LHR	60 651 349	(1.1)
2	PARIS	CDG	53 032 487	(5.0)
3	HONG KONG	HKG	44 979 094	(4.6)
4	FRANKFURT	FRA	44 520 661	(4.7)
5	AMSTERDAM	AMS	43 520 650	(8.1)
6	DUBAI	DXB	40 104 149	9.6
7	SINGAPORE	SIN	36 088 996	(0.6)
8	TOKYO	NRT	30 894 531	(4.4)
9	MADRID	MAD	29 066 144	(2.4)
10	BANGKOK	BKK	28 834 623	(4.2)

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BUSIEST AIRPORTS – CARGO (FREIGHT AND MAIL)

WORLD AIRPORT RANKING BY TOTAL CARGO (in metric tonnes)				
Total Cargo: loaded and unloaded freight and mail in metric tonnes				
RANK	CITY	CODE	TOTAL CARGO	% CHG
1	MEMPHIS TN	MEM	3 697 054	0.0
2	HONG KONG	HKG	3 385 313	(7.5)
3	SHANGHAI	PVG	2 543 394	(2.3)
4	INCHEON	ICN	2 313 001	(4.6)
5	PARIS	CDG	2 054 515	(9.9)
6	ANCHORAGE AK*	ANC	1 994 629	(15.0)
7	LOUISVILLE KY	SDF	1 949 528	(1.3)
8	DUBAI	DXB	1 927 520	5.6
9	FRANKFURT	FRA	1 887 686	(10.6)
10	TOKYO	NRT	1 851 972	(11.8)

*ANC data include transit freight.

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	3 349 693	(7.7)
2	INCHEON	ICN	2 267 551	(5.0)
3	DUBAI	DXB	1 846 249	6.1
4	TOKYO	NRT	1 810 448	(12.1)
5	PARIS	CDG	1 785 372	(11.2)
6	SHANGHAI	PVG	1 777 976	(7.2)
7	FRANKFURT	FRA	1 757 526	(10.5)
8	SINGAPORE	SIN	1 633 794	(12.0)
9	TAIPEI	TPE	1 345 333	(9.1)
10	MIAMI FL	MIA	1 332 198	(13.7)

* includes only airports with international/domestic breakdown for 2009 and 2008.

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BUSIEST AIRPORTS – AIRCRAFT MOVEMENTS

WORLD AIRPORT RANKING BY AIR TRANSPORT MOVEMENTS				
Total Movements: landing and take off of an aircraft; includes general aviation				
RANK	CITY	CODE	AIR TRANSPORT MOVEMENTS	% CHG
1	ATLANTA GA	ATL	970 235	(0.8)
2	CHICAGO IL	ORD	827 899	(6.1)
3	DALLAS/FORT WORTH TX	DFW	638 782	(2.7)
4	LOS ANGELES CA	LAX	634 383	(15.9)
5	DENVER CO	DEN	607 019	(2.0)
6	HOUSTON TX	IAH	538 168	(6.6)
7	PARIS	CDG	525 314	(6.2)
8	LAS VEGAS NV	LAS	511 064	(11.7)
9	CHARLOTTE NC	CLT	509 448	(5.0)
10	BEIJING	PEK	488 505	13.2

2009 TRAFFIC GROWTH CHANGE RELATIVE TO 2008, BY SIZE CATEGORY

- Airports with over 40 million passengers -2.4%
- Airports with 25-40 million passengers -0.9%
- Airports with 15 -25 million passengers -2.1%
- Airports with 5-15 million passengers -0.7%
- Airports with 1-5 million passengers -2.9%

Additional comments on size categories:

- Two airports, Dubai (+9%) and Bangkok (+5%), have joined the over 40 million category. New Delhi (+8.5%), Melbourne (+1.5%) and Shanghai Hongqiao (+9.5%) were new entrants in the 25-40 million category.
- The 5-15 million category accounts for a quarter (24.9%) of traffic worldwide. Out of the 137 airports in this category, 54 reported growth, which is the best ratio (39.5%) of positive growth airports of all size categories.
- 800 airports have fewer than 1 million passengers, accounting for 59% of the total report sample; 40% (323 airports) reported traffic increases in 2009.

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TOP 25 FASTEST GROWING AIRPORTS* 2009				
RANK	CITY/COUNTRY/CODE	CODE	Passengers	% CHG
1	ISTANBUL	SAW	6 640 230	52.3
2	RIO DE JANEIRO	SDU	5 103 468	40.6
3	WUHAN	WUH	12 756 161	38.6
4	CHANGSHA	CSX	11 284 282	33.5
5	SANYA	SYX	7 941 320	32.2
6	CHENGDU	CTU	22 638 671	31.2
7	XIAN	XIY	15 294 811	28.3
8	CHONGQING	CKG	14 038 045	26.0
9	ZHENGZHOU	CGO	7 342 535	24.7
10	NANJING	NKG	10 835 236	22.0
11	XIAMEN	XMN	11 327 870	20.7
12	FUZHOU	FOC	5 451 196	20.2
13	KUNMING	KMG	18 945 660	19.7
14	HANGZHOU	HGH	14 944 716	17.9
15	QING DAO	TAO	9 660 129	17.8
16	BEIJING	PEK	65 372 012	16.9
17	BELO HORIZONTE	CNF	5 867 974	16.5
18	DALIAN	DLC	9 550 365	16.4
19	BRASILIA	BSB	12 645 739	16.1
20	SALVADOR	SSA	7 774 620	15.9
21	JAKARTA	CGK	37 143 719	15.2
22	TEHRAN	THR	11 848 811	14.9
23	SHENZHEN	SZX	24 486 406	14.4
24	SHANGHAI	PVG	32 102 549	13.7
25	IZMIR	ADB	6 254 459	13.7

*Airports with over 5M passengers.

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