



Robust first quarter defies North Africa unrest and Japan tragedy

First quarter 2011 traffic recorded 4.3 per cent more passengers than 2010. Air freight was slightly slower at 3.4 per cent, but still higher than aircraft movement growth of 2.1 per cent.

Africa registered a 6.5 per cent passenger decline caused by unrest in several North African countries. The situation also impacted air freight which dropped by 5.7 per cent. The impact of the earthquake and tsunami in Japan on the Asia-Pacific region (+5.5%) was limited as it occurred in March. Declines in Africa and Japan however had an impact on freight and passenger volumes in the Middle East with -5.3 per cent and +4.8 per cent respectively. Latin America -Caribbean topped the growth chart in the first quarter adding 8 per cent more passengers and 8.5 per cent more freight.

Aircraft movements continued to stagnate in North America while capacity increased in Europe (+4.2%), Asia-Pacific (+5.4%) and Latin America-Caribbean (+4.5%).

As in previous quarters international traffic (passengers and freight) grew faster than domestic traffic. Asia-Pacific (+6.5%) and Europe (+5.6%) registered the most rapid international growth while Africa suffered a more severe international traffic drop (-10.3%).

The international economic situation is conducive to further growth in air passenger and freight

traffic. China continues to lead the global economic growth at 9.7 per cent followed by Canada (+6%) and Germany (+4.9%) while Brazil's economy expanded by 4.2 per cent. The impact on Japan's economy from the earthquake was already visible as economic output shrank by 1 per cent year-on-year in Q1.

Among the world's largest aviation markets, Japan has lost 8.9 per cent in passengers in Q1 only topped by Egypt which saw 38 per cent less passengers than a year ago. New Zealand also contracted by 1.1 per cent as a result of the earthquake hitting Christchurch in February. India, Brazil, Turkey, Philippines, Malaysia and Indonesia all registered double digit quarterly growth.

World trade volume, an important indicator for air freight demand, expanded by 9.8 per cent in the first quarter. The increase came on top of 15 per cent growth in Q1 2010. The Q1 2011 trade volume was the highest ever registered in a first quarter of a year.

The outlook for the second quarter remains positive as the situation in North Africa and Japan have stabilized and traffic has been picking up there. Uncertainties for the global economy remain with regard to sovereign debt issues but so far the 'real' economy has not been affected by the developments and continues its post-recovery upward trend.

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Note: all charts compare Q1 2011 performance to Q1 2010 performance.

Figure 1: Q1 2011 percentage growth year-on-year

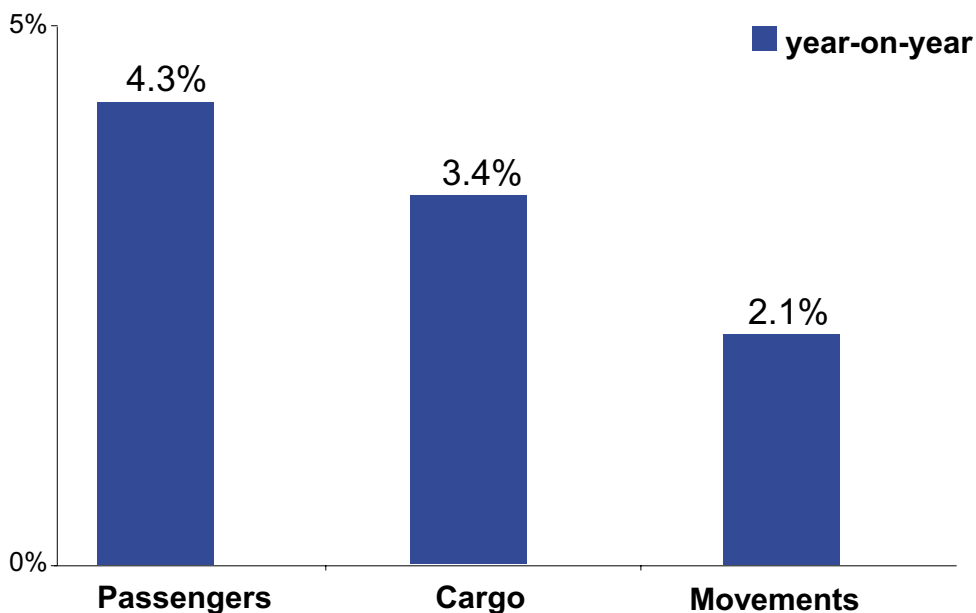


Figure 2: Q1 2011 total passengers

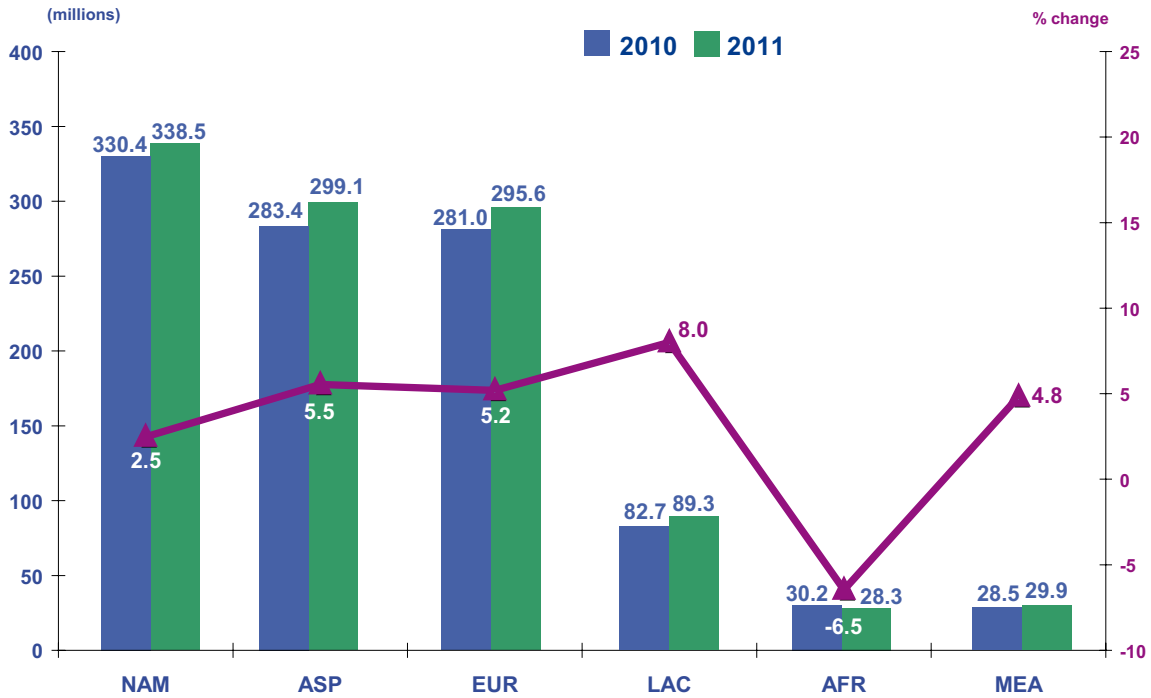


Figure 3: Q1 2011 total cargo

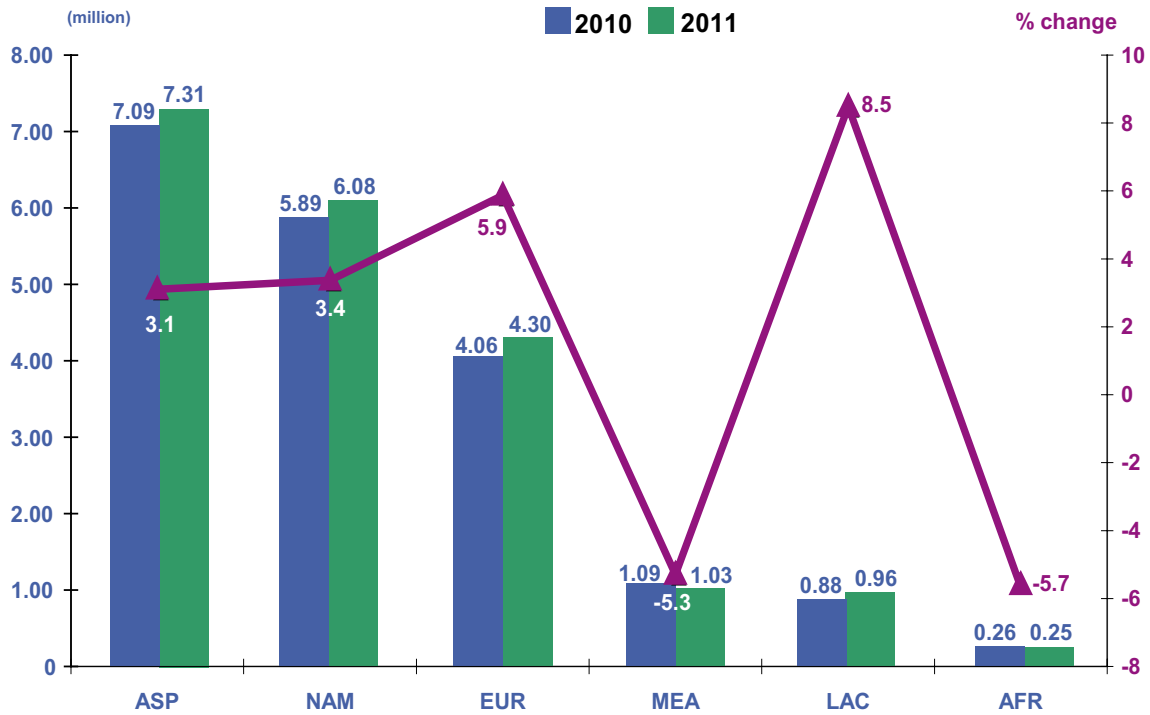


Figure 4: Q1 2011 total movements

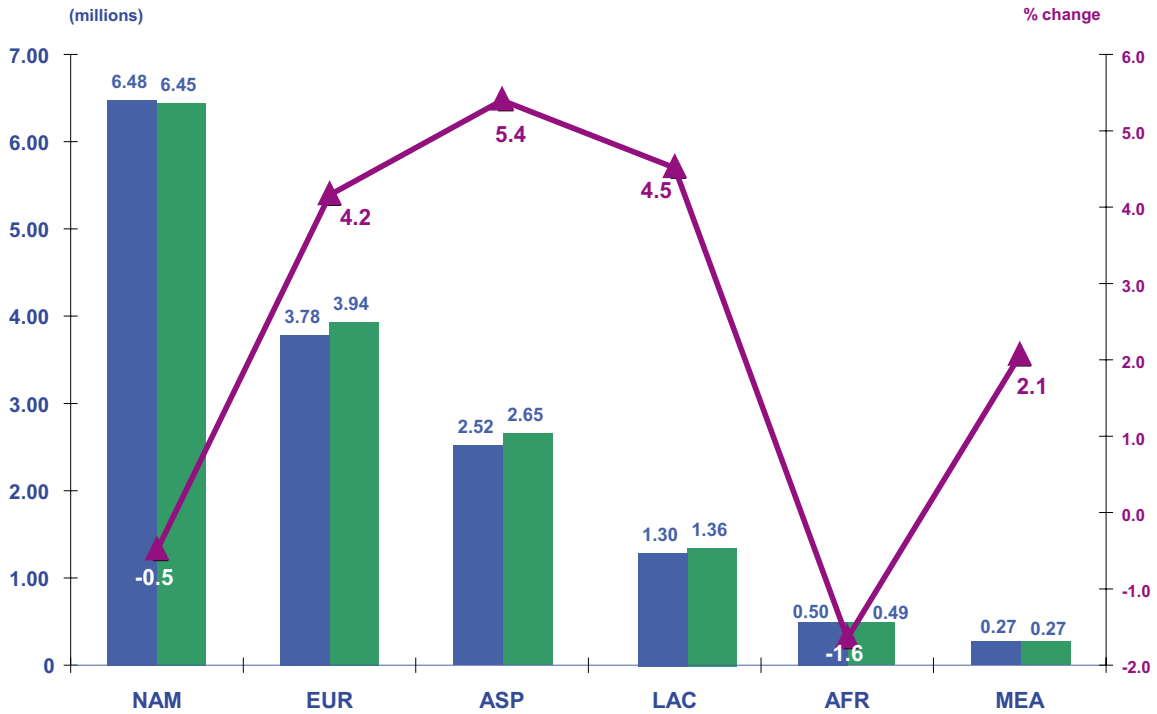


Figure 5: Q1 2011 International passenger and freight year-on-year

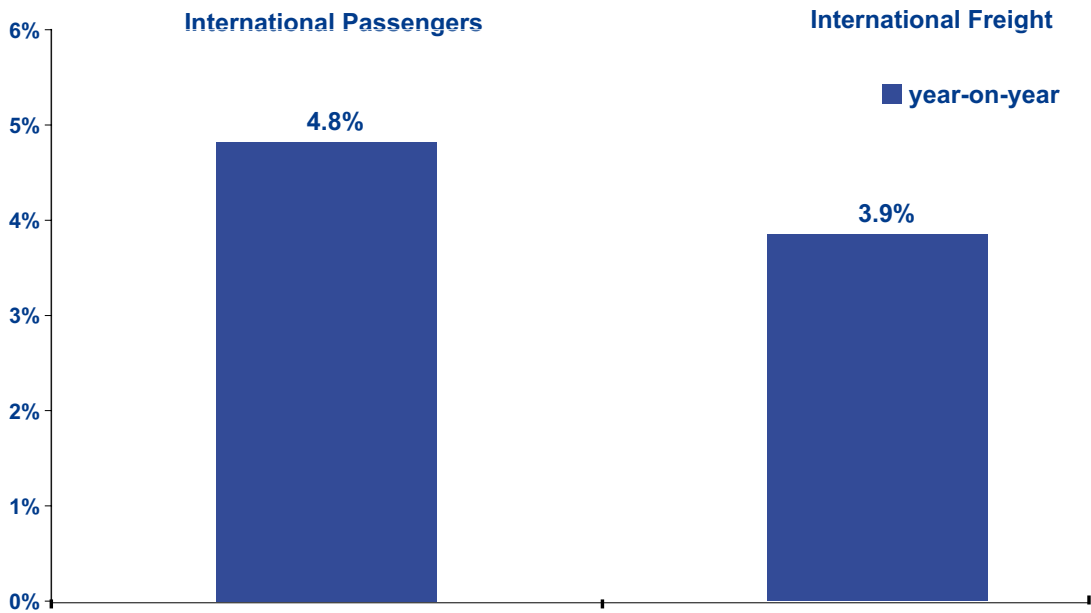


Figure 6: Q1 2011 International passengers

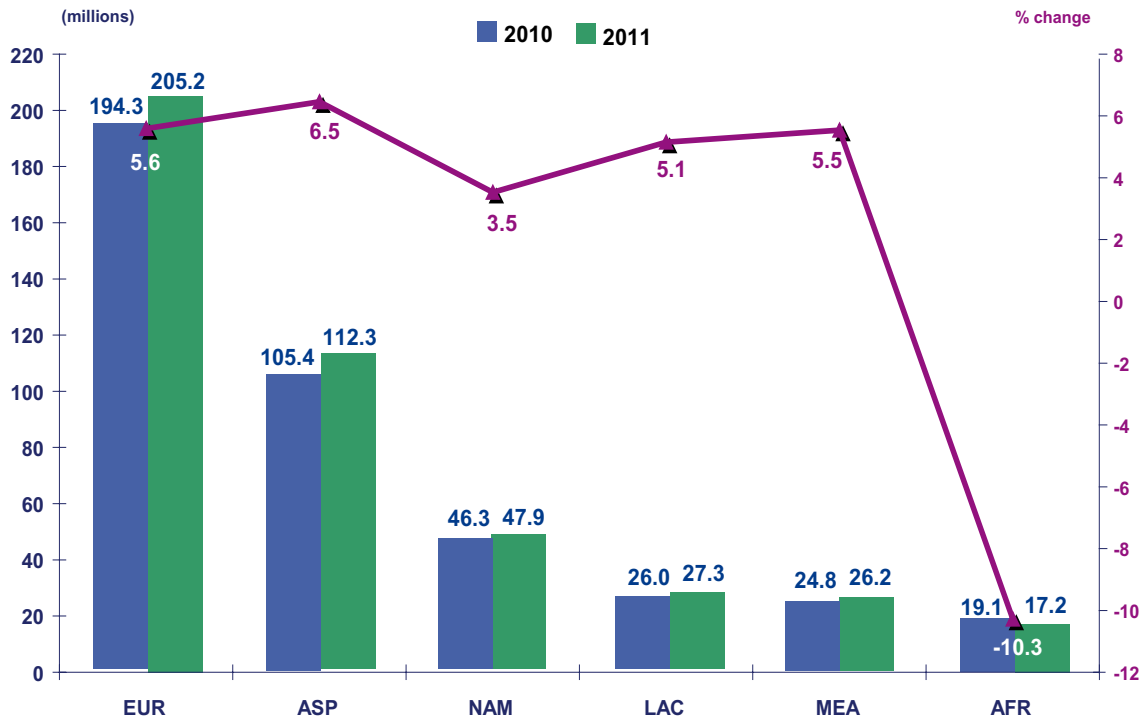


Figure 7: Q1 2011 International freight (metric tonnes)

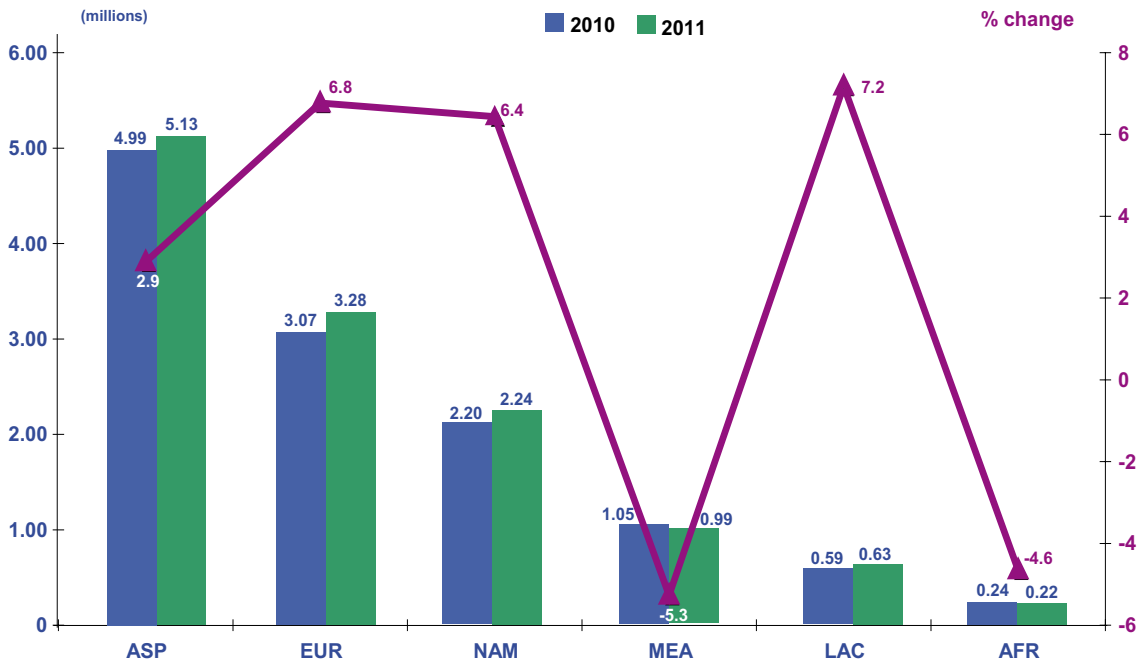


Figure 8: Evolution of airport traffic worldwide 2011

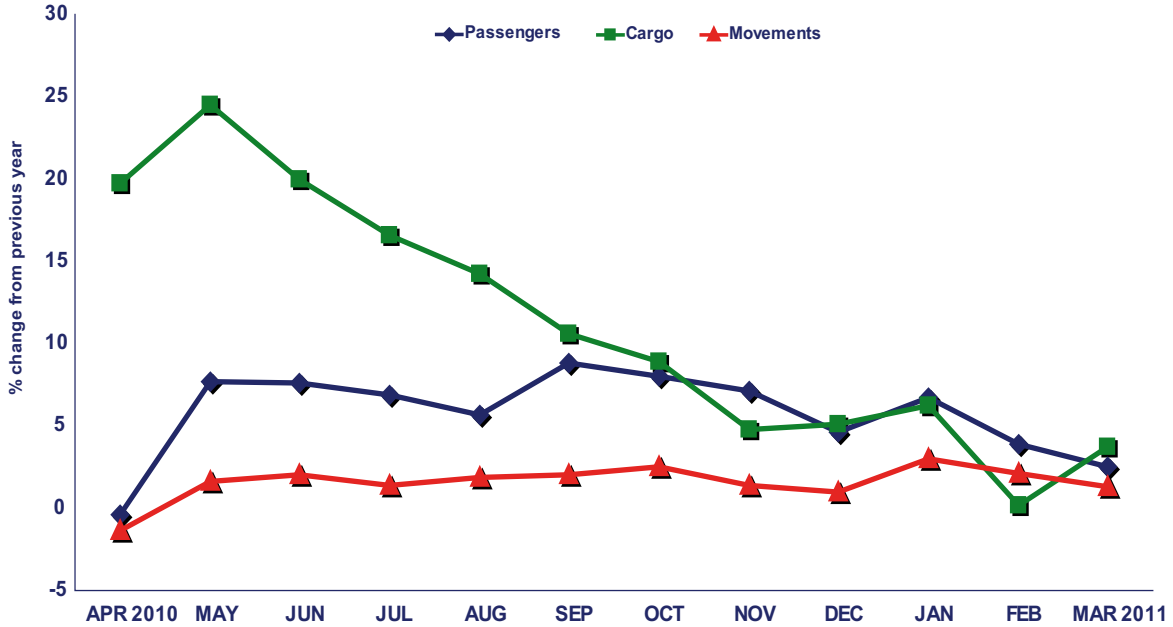


Figure 9: GDP growth in major markets year-on-year Q1 2011

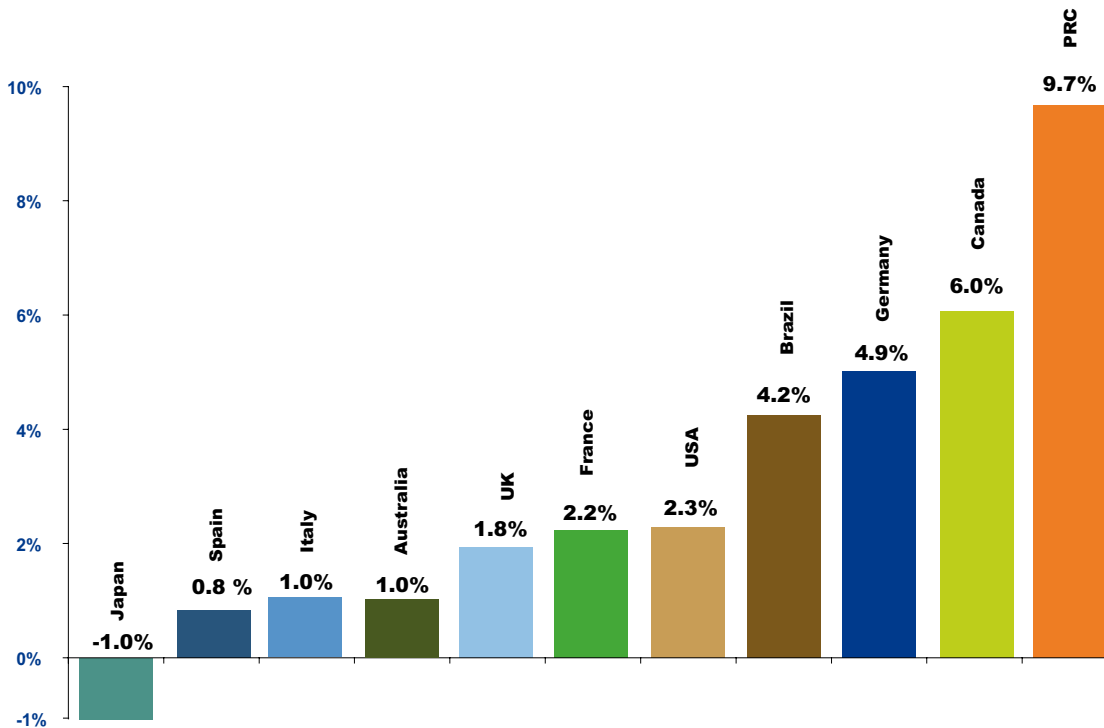
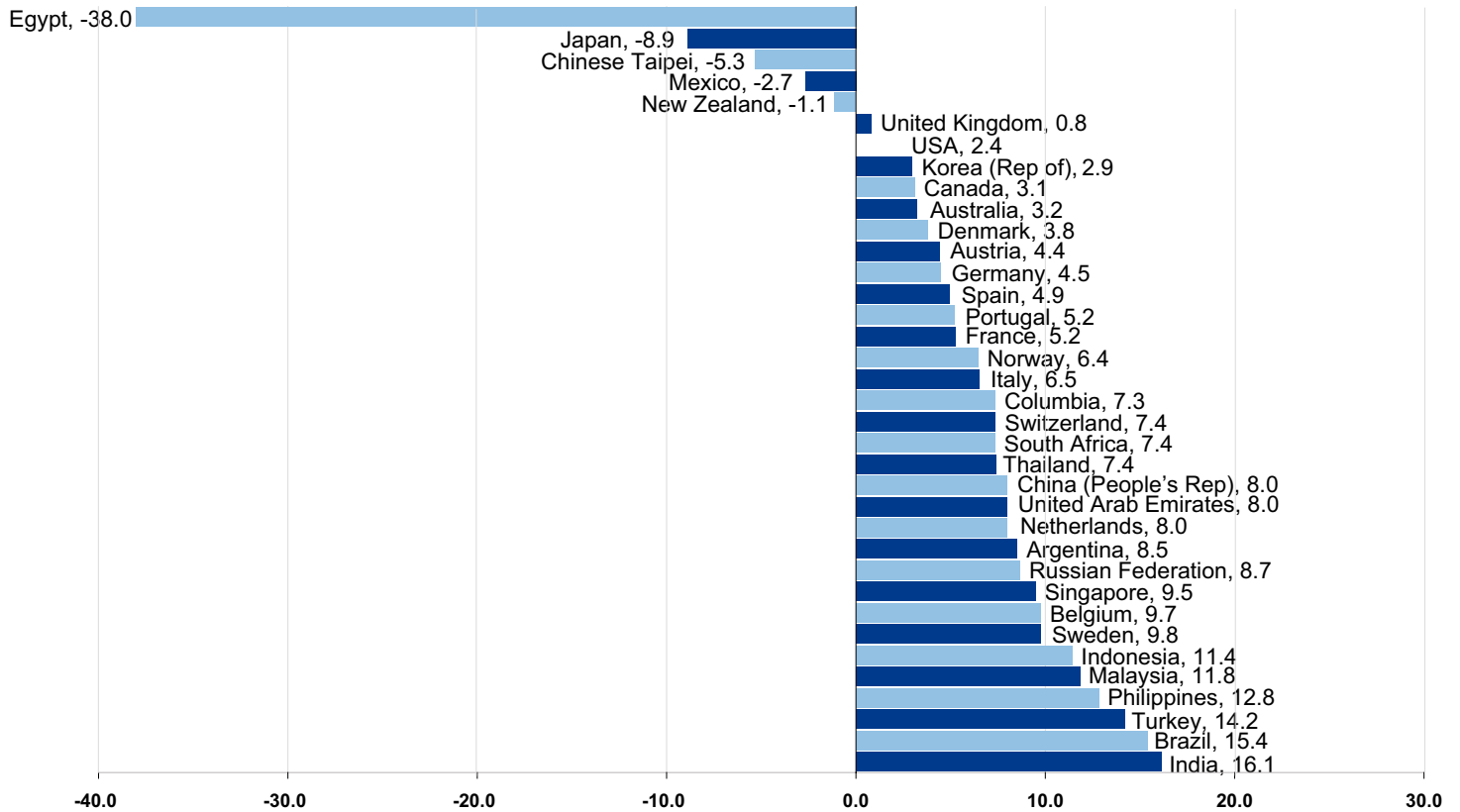
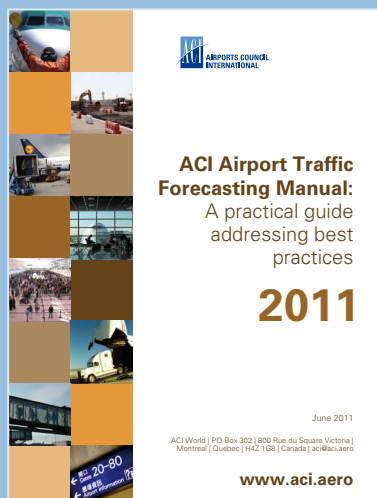


Figure 10: Q1 2011 percentage growth in world's largest aviation markets year-on-year



*Macau data is not available



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Figure 11: 30 airports reporting biggest year-on-year growth in Q1 2011

Airport, country	CODE	total passengers	% change
ISTANBUL, TR	SAW	2 847 458	29.3
SHANGHAI, CN	SHA	7 619 858	26.4
BUENOS AIRES, AR	AEP	2 321 229	25.7
CALCUTTA, IN	CCU	2 514 506	21.9
LIMA, PE	LIM	2 837 987	20.9
MOSCOW, RU	SVO	4 304 844	20.6
BELO HORIZONTE, BR	CNF	2 105 729	19.5
RIO DE JANEIRO, BR	GIG	3 678 350	18.1
NEW DELHI, IN	DEL	7 942 515	16.7
HA NOI, VN	HAN	2 626 930	16.4
XIAMEN, CN	XMN	3 575 594	16.1
ANTALYA, TR	AYT	2 216 141	15.8
BARCELONA, ES	BCN	6 682 025	15.5
MUMBAI, IN	BOM	7 490 489	14.3
BANGALORE, IN	BLR	2 914 683	13.9
MADRAS, IN	MAA	3 069 386	12.9
MANILA, PH	MNL	7 307 507	12.8
JAKARTA, ID	CGK	11 098 475	12.8
KUALA LUMPUR, MY	KUL	8 922 631	12.4
SÃO PAULO, BR	GRU	7 456 621	12.2
TENERIFE, ES	TFS	2 269 797	12.1
MUNICH, DE	MUC	8 038 849	11.8
BERLIN, DE	TXL	3 493 489	11.4
STOCKHOLM, SE	ARN	4 116 733	11.1
BRASILIA, BR	BSB	3 812 741	10.5
CHENGDU, CN	CTU	6 653 405	10.4
SÃO PAULO, BR	CGH	3 832 816	9.8
BOGOTA, CO	BOG	4 733 020	9.6
SINGAPORE, SG	SIN	10 885 926	9.5
HOUSTON TX, US	HOU	2 222 000	9.4

Figure 12: Airports reporting biggest year-on-year declines in Q1 2011

Airport, country	CODE	total passengers	% change
CAIRO, EG	CAI	2 561 653	-27.44
OSAKA, JP	ITM	2 992 948	-16.59
TOKYO, JP	NRT	7 049 350	-15.95
ATHENS, GR	ATH	2 666 688	-15.81
FUKUOKA, JP	FUK	3 745 475	-9.43
NAGOYA, JP	NGO	2 140 108	-8.97
NAHA, JP	OKA	3 248 561	-8.45
SAPPORO, JP	CTS	3 716 863	-7.36
LONDON, GB	STN	3 667 479	-6.56
NEWARK NJ, US	EWR	7 067 799	-5.93
TAIPEI, TW	TPE	5 765 987	-5.41
PALMA DE MALLORCA, ES	PMI	2 450 620	-5.33
MEMPHIS TN, US	MEM	2 163 239	-5.24
OSAKA, JP	KIX	3 303 251	-5.17
TOKYO, JP	HND	14 614 197	-4.43
PRAGUE, CZ	PRG	2 134 449	-3.62
OAKLAND CA, US	OAK	2 089 279	-2.47
BUENOS AIRES, AR	EZE	2 248 991	-2.20
DUBLIN, IE	DUB	3 827 749	-2.18
MEXICO CITY, MX	MEX	5 570 281	-2.14
SAN JUAN, PR	SJU	2 148 705	-1.79
CHICAGO IL, US	ORD	14 579 746	-0.79
TAMPA FL, US	TPA	4 250 287	-0.77
HOUSTON TX, US	IAH	9 340 119	-0.67
CANCUN, MX	CUN	3 587 619	-0.62
SEOUL, KR	GMP	3 922 253	-0.47
ST LOUIS MO, US	STL	2 769 228	-0.36
MINNEAPOLIS MN, US	MSP	7 485 599	-0.20
CALGARY AB, CA	YYC	2 959 471	-0.12
SAN DIEGO CA, US	SAN	3 808 518	-0.10

Figure 13: Q1 2011 year-on-year growth per size category

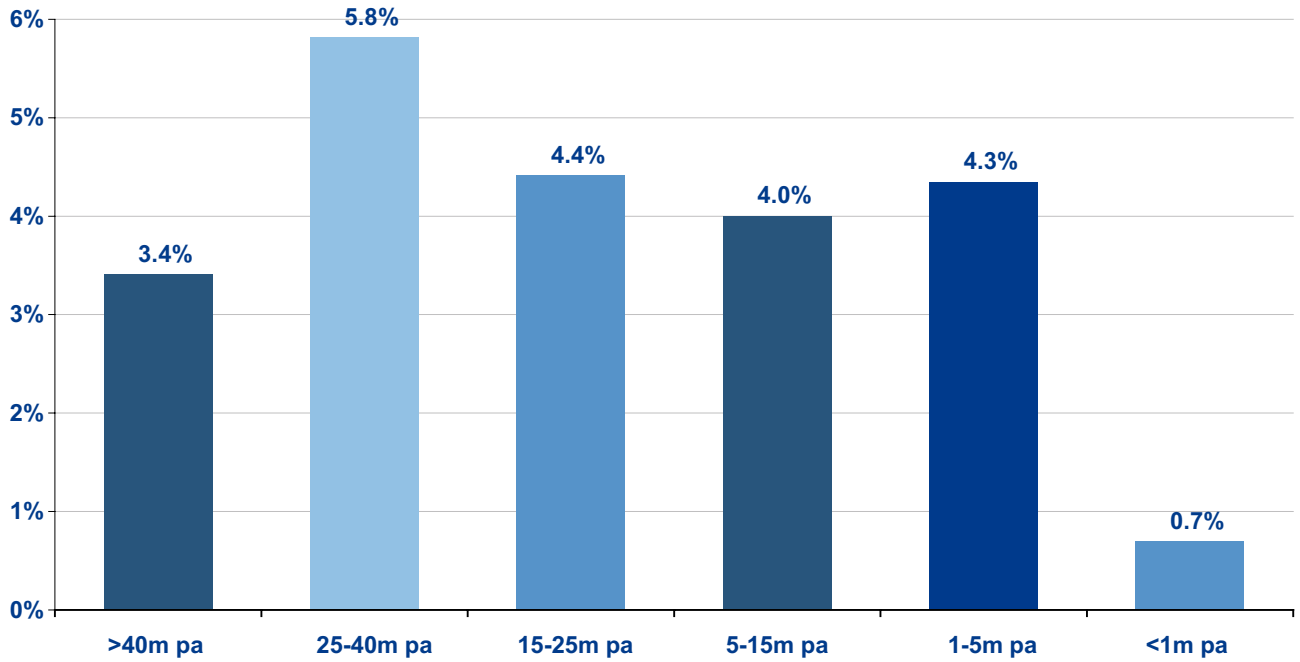


Figure 14: Q1 2011 airport size category and market share

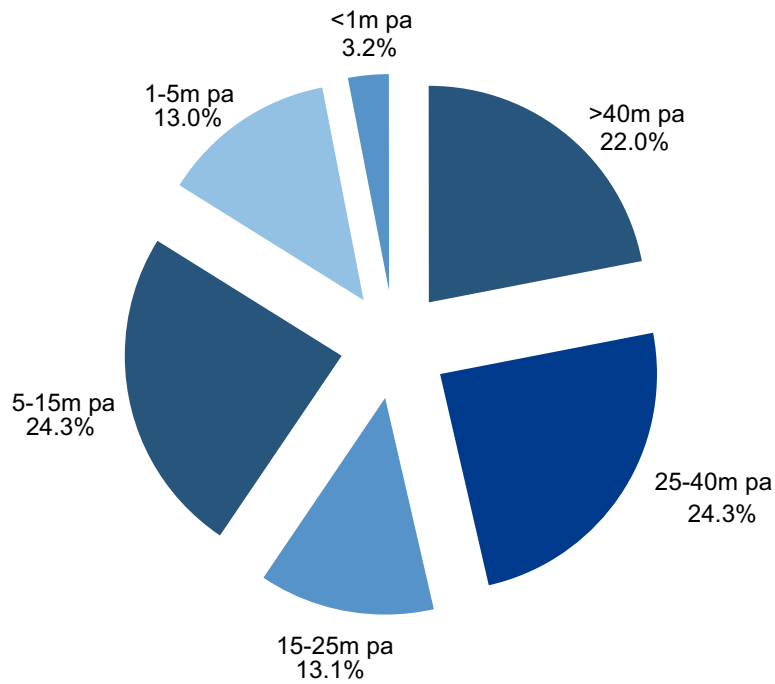


Figure 15: Top 20 international airports Q1 2011
 (international traffic only - year-on-year percentage change)

Airport, country	Code	Passengers	% change
LONDON, GB	LHR	13 853 285	2.2
HONG KONG, HK	HKG	12 225 000	4.4
DUBAI, AE	DXB	12 093 829	7.3
PARIS, FR	CDG	11 811 361	2.3
SINGAPORE, SG	SIN	10 630 358	10.0
FRANKFURT, DE	FRA	10 200 923	4.0
AMSTERDAM, NL	AMS	9 960 598	7.6
BANGKOK, TH	BKK	9 595 182	8.8
INCHEON, KR	ICN	8 314 664	4.7
MADRID, ES	MAD	6 978 189	4.1
TOKYO, JP	NRT	6 642 387	-17.2
KUALA LUMPUR, MY	KUL	6 199 775	14.3
LONDON, GB	LGW	5 818 123	4.9
MUNICH, DE	MUC	5 724 039	13.3
TAIPEI, TW	TPE	5 309 661	-4.4
TORONTO ON, CA	YYZ	5 114 466	8.6
ZURICH, CH	ZRH	5 012 743	4.7
NEWYORK NY, US	JFK	4 884 923	3.1
ROME, IT	FCO	4 669 450	4.4
ISTANBUL, TR	IST	4 653 883	11.7

Figure 16: Total Passenger Regional Trends

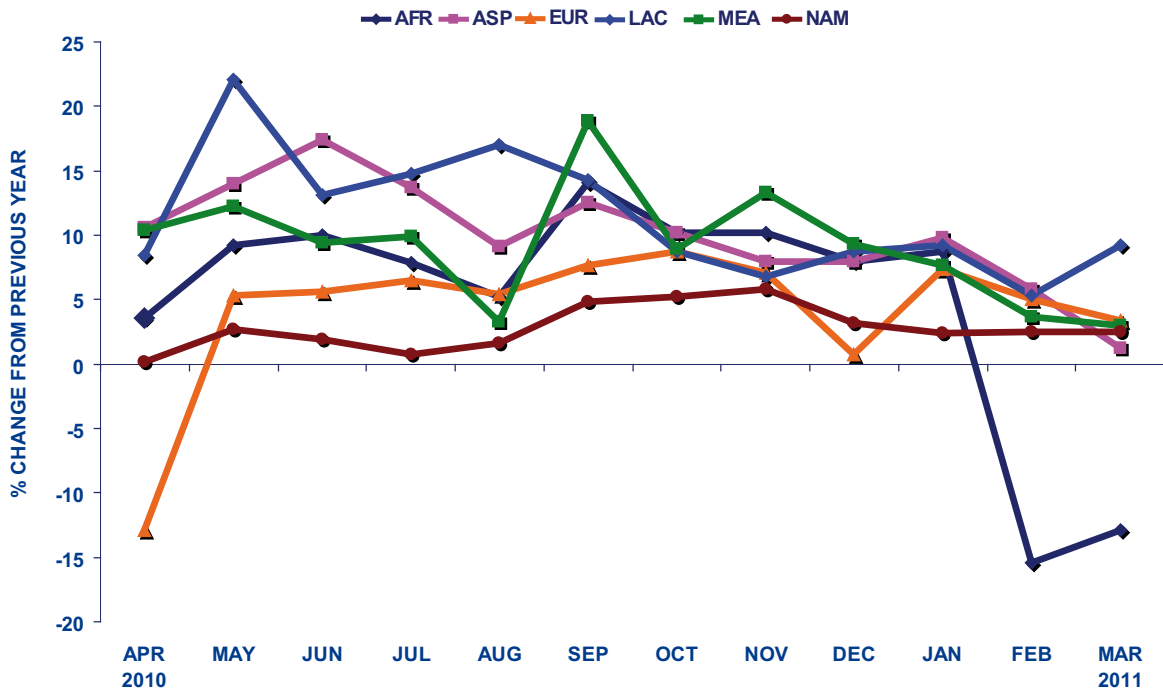


Figure 17: International Passenger Regional Trends

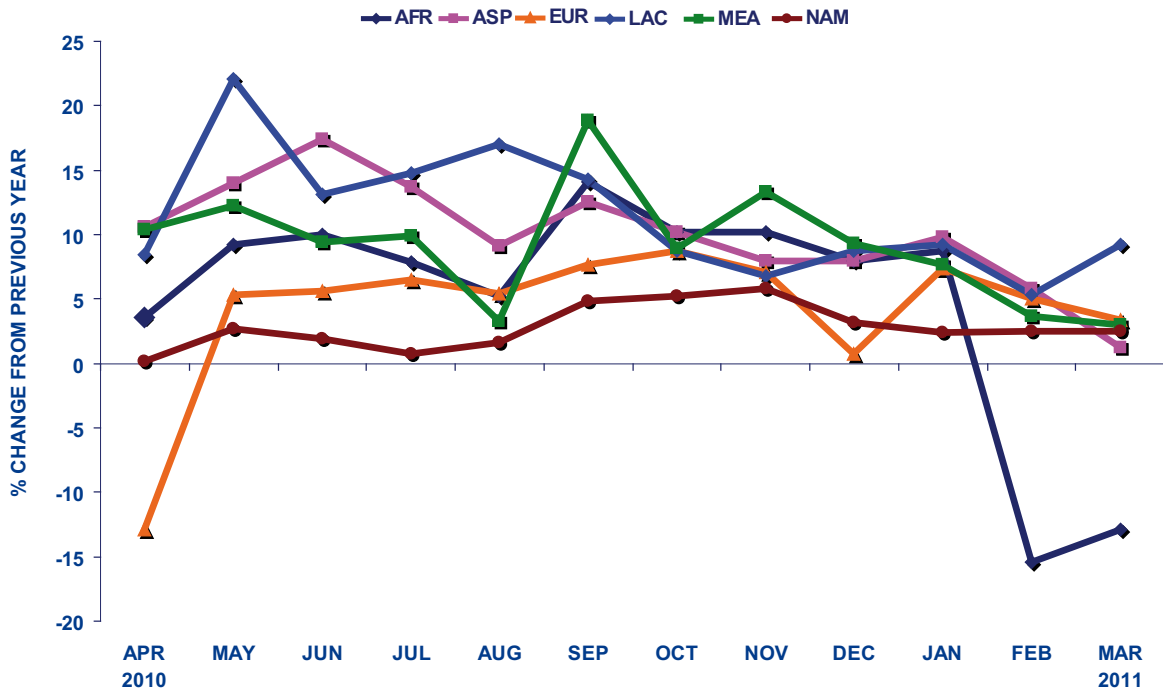


Figure 18: International Freight Regional Trends

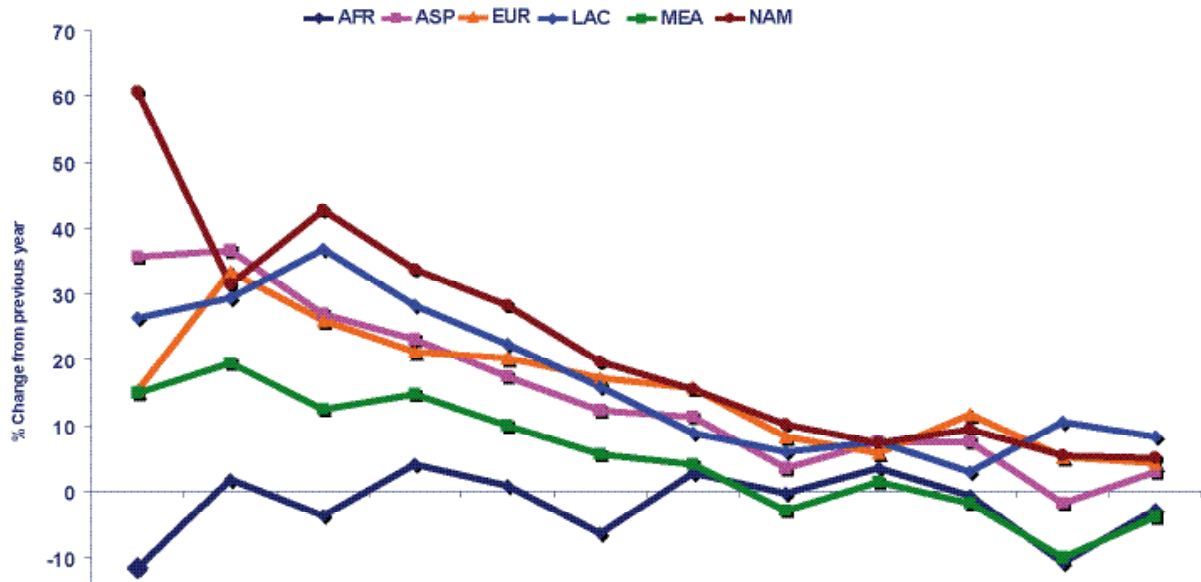
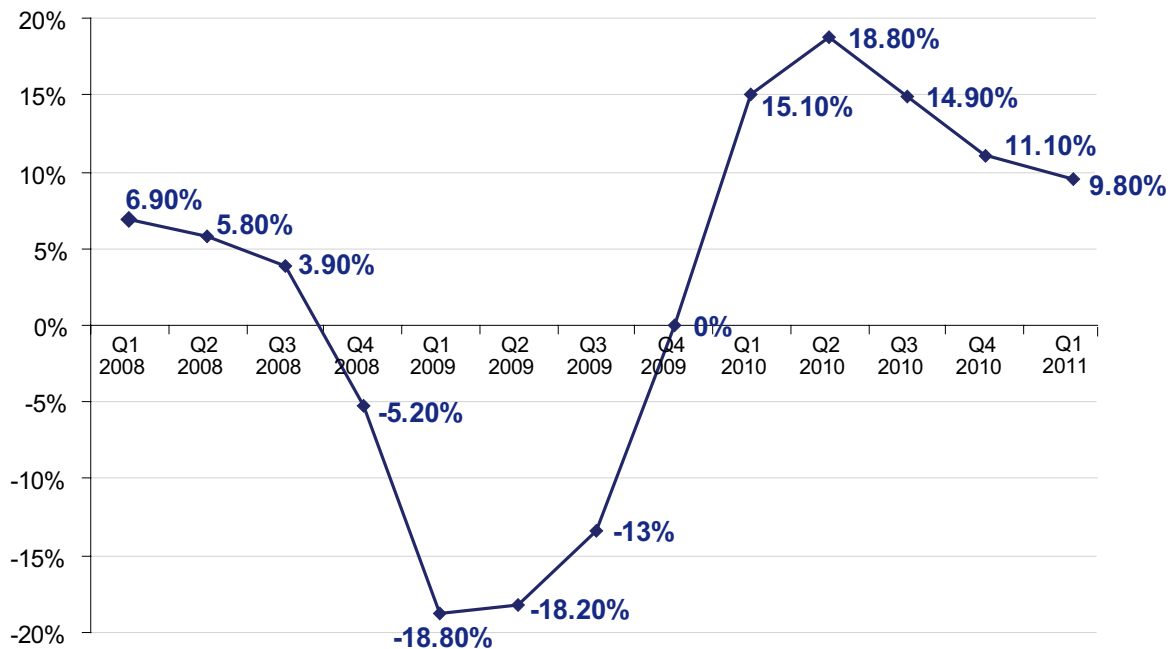


Figure 19: World trade volume



Source: CPB Netherlands Bureau for Economic Policy Analysis