

## Traffic Snapshot

- MAHB network of airports registered 9.6 million total passenger movements in November 2023, reaching 83.3% of 2019 levels amid a challenging backdrop to recovery.
- The total passenger movements for the network of airports were driven by the international sector, which registered 4.9 million passengers and sustained a monthly recovery rate above 89.5% over 2019 levels since July 2023.
- Domestic passenger movements trail at 4.7 million passengers, an increase of 10.5% over November 2022.
- Airports in Malaysia recorded 6.6 million passenger movements, an increase of 27.4% compared to November 2022, reaching 76.5% of pre-pandemic levels.
- The international and domestic sector depicts 2019 trends at 52:48 market share although traffic is still recovering.
- International and domestic passenger movements registered 3.4 million and 3.2 million passengers, an increase of 51.8% and 8.8% over November 2022 respectively.
- Istanbul SGIA recorded close to 3.0 million passenger movements in November 2023, superseding 2019 at 3.5%.
- International and domestic passenger movements were almost equal registering at 1.5 million and 1.4 million passengers, amidst the off-peak travel season and the temporary suspension of seven daily flights to Tel Aviv.

Passenger movements ('000) snapshot, November 2023

Total	2023 November	2022 November	% YOY	2023 Year-to-date	2022 Year-to-date	%YOY	2023 12M	2022 12M	%YOY
<b>KLIA</b>	<b>3,986</b>	<b>2,852</b>	<b>39.8%</b>	<b>42,578</b>	<b>21,680</b>	<b>96.4%</b>	<b>46,297</b>	<b>22,913</b>	<b>102.1%</b>
<i>International</i>	<b>2,894</b>	<b>1,941</b>	<b>49.1%</b>	<b>29,161</b>	<b>11,811</b>	<b>146.9%</b>	<b>31,624</b>	<b>12,127</b>	<b>160.8%</b>
<i>ASEAN</i>	1,394	1,014	37.5%	14,502	6,197	134.0%	15,808	6,337	149.4%
<i>Non-ASEAN</i>	1,499	927	61.8%	14,659	5,614	161.1%	15,816	5,790	173.2%
<i>Domestic</i>	1,093	911	19.9%	13,417	9,869	35.9%	14,673	10,785	36.0%
<b>MASB Airports</b>	<b>2,641</b>	<b>2,350</b>	<b>12.4%</b>	<b>31,575</b>	<b>24,219</b>	<b>30.4%</b>	<b>34,666</b>	<b>26,117</b>	<b>32.7%</b>
<i>International</i>	<b>523</b>	<b>310</b>	<b>68.4%</b>	<b>5,416</b>	<b>1,838</b>	<b>194.6%</b>	<b>5,833</b>	<b>1,843</b>	<b>216.5%</b>
<i>ASEAN</i>	407	284	42.9%	4,182	1,734	141.2%	4,551	1,738	161.8%
<i>Non-ASEAN</i>	116	26.0	346.5%	1,234	105	1077.9%	1,283	105	1120.4%
<i>Domestic</i>	2,118	2,040	3.8%	26,159	22,381	16.9%	28,832	24,273	18.8%
<b>Total MAHB</b>	<b>6,627</b>	<b>5,202</b>	<b>27.4%</b>	<b>74,153</b>	<b>45,899</b>	<b>61.6%</b>	<b>80,963</b>	<b>49,029</b>	<b>65.1%</b>
<b>Istanbul SGIA<sup>2</sup></b>	<b>2,992</b>	<b>2,661</b>	<b>12.4%</b>	<b>34,416</b>	<b>28,451</b>	<b>21.0%</b>	<b>37,144</b>	<b>30,685</b>	<b>21.0%</b>
<b>Total MAHB System</b>	<b>9,619</b>	<b>7,863</b>	<b>22.3%</b>	<b>108,568</b>	<b>74,351</b>	<b>46.0%</b>	<b>118,106</b>	<b>79,714</b>	<b>48.2%</b>

International	2023 November	2022 November	% YOY	2023 Year- to-date	2022 Year- to-date	%YOY	2023 LTM	2022 LTM	%YOY
<b>KLIA</b>	<b>2,894</b>	<b>1,941</b>	<b>49.1%</b>	<b>29,161</b>	<b>11,811</b>	<b>146.9%</b>	<b>31,624</b>	<b>12,127</b>	<b>160.8%</b>
ASEAN	1,394	1,014	37.5%	14,502	6,197	134.0%	15,808	6,337	149.4%
Non-ASEAN	1,499	927	61.8%	14,659	5,614	161.1%	15,816	5,790	173.2%
<b>MASB Airports</b>	<b>523</b>	<b>310</b>	<b>68.4%</b>	<b>5,416</b>	<b>1,838</b>	<b>194.6%</b>	<b>5,833</b>	<b>1,843</b>	<b>216.5%</b>
ASEAN	407	284	42.9%	4,182	1,734	141.2%	4,551	1,738	161.8%
Non-ASEAN	116	26.0	346.5%	1,234	105	1077.9%	1,283	105	1120.4%
<b>Total KLIA &amp; MASB</b>	<b>3,417</b>	<b>2,251</b>	<b>51.8%</b>	<b>34,577</b>	<b>13,649</b>	<b>153.3%</b>	<b>37,458</b>	<b>13,971</b>	<b>168.1%</b>
ASEAN	1,801	1,298	38.7%	18,683	7,931	135.6%	20,358	8,075	152.1%
Non-ASEAN	1,616	953	69.6%	15,893	5,718	177.9%	17,099	5,895	190.1%
<b>Istanbul SGIA</b>	<b>1,528</b>	<b>1,381</b>	<b>10.7%</b>	<b>17,868</b>	<b>14,213</b>	<b>25.7%</b>	<b>19,366</b>	<b>15,299</b>	<b>26.6%</b>
<b>Total MAHB System</b>	<b>4,945</b>	<b>3,632</b>	<b>36.1%</b>	<b>52,445</b>	<b>27,862</b>	<b>88.2%</b>	<b>56,824</b>	<b>29,269</b>	<b>94.1%</b>

Domestic	2023 November	2022 November	% YOY	2023 Year- to-date	2022 Year- to-date	%YOY	2023 LTM	2022 LTM	%YOY
KLIA	1,093	911	19.9%	13,417	9,869	35.9%	14,673	10,785	36.0%
MASB Airports	2,118	2,040	3.8%	26,159	22,381	16.9%	28,832	24,273	18.8%
<b>Total</b>	<b>3,211</b>	<b>2,951</b>	<b>8.8%</b>	<b>39,576</b>	<b>32,250</b>	<b>22.7%</b>	<b>43,505</b>	<b>35,059</b>	<b>24.1%</b>
<b>Istanbul SGIA</b>	<b>1,463</b>	<b>1,280</b>	<b>14.3%</b>	<b>16,547</b>	<b>14,238</b>	<b>16.2%</b>	<b>17,777</b>	<b>15,386</b>	<b>15.5%</b>
<b>Total MAHB System</b>	<b>4,674</b>	<b>4,231</b>	<b>10.5%</b>	<b>56,123</b>	<b>46,488</b>	<b>20.7%</b>	<b>61,282</b>	<b>50,445</b>	<b>21.5%</b>

\*November is preliminary, where main variations if any lie largely from the non-scheduled or charter flights at domestic airports

\*\*MASB Airports refers to the 38 Malaysian airports other than KLIA/KUL operated by Malaysia Airports Sdn Bhd.

†LTM refers to the last twelve months, up to and including the month in question

‡Istanbul SGIA is Istanbul Sabiha Gokcen International Airport with the SAW three-letter International Air Transport Association (IATA) code

#### KLIA Terminal 1 & Terminal 2 passenger movements ('000) snapshot , November 2023

Airport	2023 November	2022 November	% YOY	2023 Year- to-date	2022 Year- to-date	%YOY	2023 LTM	2022 LTM	%YOY
<b>Terminal 1 Total</b>	<b>2,164</b>	<b>1,587</b>	<b>36.3%</b>	<b>21,159</b>	<b>11,348</b>	<b>86.5%</b>	<b>23,144</b>	<b>11,967</b>	<b>93.4%</b>
<i>International</i>	<b>1,681</b>	<b>1,221</b>	<b>37.6%</b>	<b>16,534</b>	<b>7,586</b>	<b>117.9%</b>	<b>18,032</b>	<b>7,855</b>	<b>129.5%</b>
ASEAN	619	448	38.2%	5,919	2,696	119.5%	6,489	2,791	132.5%
Non-ASEAN	1,062	774	37.2%	10,615	4,890	117.1%	11,542	5,064	127.9%
<i>Domestic</i>	<b>483</b>	<b>366</b>	<b>32.0%</b>	<b>4,625</b>	<b>3,762</b>	<b>22.9%</b>	<b>5,112</b>	<b>4,111</b>	<b>24.3%</b>
<b>Terminal 2 Total</b>	<b>1,822</b>	<b>1,265</b>	<b>44.1%</b>	<b>21,419</b>	<b>10,332</b>	<b>107.3%</b>	<b>23,153</b>	<b>10,946</b>	<b>111.5%</b>
<i>International</i>	<b>1,213</b>	<b>719</b>	<b>68.6%</b>	<b>12,627</b>	<b>4,225</b>	<b>198.9%</b>	<b>13,592</b>	<b>4,272</b>	<b>218.2%</b>
ASEAN	775	566	37.0%	8,583	3,501	145.1%	9,319	3,547	162.8%
Non-ASEAN	438	153	185.7%	4,044	724	459.0%	4,274	726	489.0%
<i>Domestic</i>	<b>610</b>	<b>546</b>	<b>11.7%</b>	<b>8,792</b>	<b>6,108</b>	<b>44.0%</b>	<b>9,561</b>	<b>6,674</b>	<b>43.3%</b>

**Aircraft movements snapshot, November 2023**

Total	2023	2022	% YOY	2023	2022	%YOY	2023	2022	%YOY
	November			Year- to-date			LTM		
KLIA	26,264	21,058	24.7%	289,491	174,394	66.0%	313,399	187,528	67.1%
MASB Airports	27,548	30,734	-10.4%	335,095	318,950	5.1%	367,316	347,208	5.8%
<b>Total</b>	<b>53,812</b>	<b>51,792</b>	<b>3.9%</b>	<b>624,586</b>	<b>493,344</b>	<b>26.6%</b>	<b>680,715</b>	<b>534,736</b>	<b>27.3%</b>
Istanbul SGIA	17,547	15,808	11.0%	203,108	178,542	13.8%	219,954	194,397	13.1%
<b>Total MAHB System</b>	<b>71,359</b>	<b>67,600</b>	<b>5.6%</b>	<b>827,694</b>	<b>671,886</b>	<b>23.2%</b>	<b>900,669</b>	<b>729,133</b>	<b>23.5%</b>

International	2023	2022	% YOY	2023	2022	%YOY	2023	2022	%YOY
	November			Year- to-date			LTM		
KLIA	18,714	13,851	35.1%	193,931	95,533	103.0%	209,226	100,964	107.2%
MASB Airports	4,914	3,780	30.0%	52,268	28,064	86.2%	56,462	29,402	92.0%
<b>Total</b>	<b>23,628</b>	<b>17,631</b>	<b>34.0%</b>	<b>246,199</b>	<b>123,597</b>	<b>99.2%</b>	<b>265,688</b>	<b>130,366</b>	<b>103.8%</b>
Istanbul SGIA	9,100	8,215	10.8%	107,719	91,515	17.7%	116,843	99,359	17.6%
<b>Total MAHB System</b>	<b>32,728</b>	<b>25,846</b>	<b>26.6%</b>	<b>353,918</b>	<b>215,112</b>	<b>64.5%</b>	<b>382,531</b>	<b>229,725</b>	<b>66.5%</b>

Domestic	2023	2022	% YOY	2023	2022	%YOY	2023	2022	%YOY
	November			Year- to-date			LTM		
KLIA	7,550	7,207	4.8%	95,560	78,861	21.2%	104,173	86,564	20.3%
MASB Airports	22,634	26,954	-16.0%	282,827	290,886	-2.8%	310,854	317,806	-2.2%
<b>Total</b>	<b>30,184</b>	<b>34,161</b>	<b>-11.6%</b>	<b>378,387</b>	<b>369,747</b>	<b>2.3%</b>	<b>415,027</b>	<b>404,370</b>	<b>2.6%</b>
Istanbul SGIA	8,447	7,593	11.2%	95,389	87,027	9.6%	103,111	95,038	8.5%
<b>Total MAHB System</b>	<b>38,631</b>	<b>41,754</b>	<b>-7.5%</b>	<b>473,776</b>	<b>456,774</b>	<b>3.7%</b>	<b>518,138</b>	<b>499,408</b>	<b>3.8%</b>

## Overview of traffic

Despite the off-peak travelling season in November 2023, MAHB network of airports recorded 9.6 million passenger movements, sustaining a traffic recovery above 83.3% over pre-pandemic levels. The international sector continues to drive traffic recovery recording at 4.9 million passengers with 51% market share since October 2023. The domestic sector trailing at 4.6 million passenger movements, reaching 77.6% of 2019 levels, partly due to airlines expansions to the international sector and the unexpected decline in domestic capacity from mid-October. November international and domestic market share of 51% and 49% respectively trails the pre-pandemic trends although traffic is still recovering, signaling traffic continues to project traffic recovery amidst a challenging backdrop.

On the local front, despite the off-peak travelling season and the minor structural change in the domestic landscape, airports in Malaysia continued to register more than 6.6 million passenger movements in November 2023. November international and domestic market share depicts the pre-pandemic performance of 52% and 48% respectively for the second consecutive month. International and domestic passenger movements registered 3.4 million and 3.2 million passengers reaching 77.7% and 75.3% respectively. The continuous traffic growth in November was partly due the introduction of four new services from KLIA to the United Arab Emirates (UAE) with four weekly flights by Batik Air Malaysia, Raja Sansi and Thiruvananthapuram with twice

weekly flights by Malaysia Airlines. Firefly commenced five weekly flights to Don Mueang from Penang International Airport.

The average load factor for the domestic sector in November recorded above 80% for the second consecutive month, with the airline's seat capacity offered at 66% of pre-pandemic levels, an indication that domestic air travel demand is still positive towards recovery.

Istanbul SGIA total passenger movements in November 2023 continued to register double-growth of 12.4% over November 2022, registering 3.0 million passengers and surpassing 2019 levels by 3.5%. International and domestic passenger movements in both sectors recorded 1.5million and 1.4 million passengers, an increase of 10.7% and 14.3% over November 2022, respectively.

*Research and Planning, MAHB*  
*26 December 2023*