

Traffic snapshot

- Total passenger movements for the MAHB network of airports continued to show robust growth with 4.7million passengers in November 2021, the highest volume recorded since the beginning of the pandemic. Total passenger movements for November reached 99.0% of March 2020, when the Movement Control Order (MCO) in Malaysia was first implemented on 18th March and suspension of international flights in Turkey on the last week of the March.
- Domestic traffic, shaped by the success of the vaccination roll out and relaxed travel rules for both Malaysia and Turkey, recorded 3.5million passengers, the highest passenger movements recorded since February 2020. Malaysia domestic passenger movements showed remarkable rebound just seven (7) weeks after the interstate travel ban was lifted, recording more than 2million passenger movements, the highest volume recorded to-date since March 2020, reaching 50.5% of November 2019 traffic.
- International passenger movements for Malaysia showed improvement compared to October 2021, with uplift of Umrah travel from 18th October, Langkawi international travel bubble for foreign tourist from 15th November and the Malaysia-Singapore Vaccinated Travel Lane (VTL) which commenced on 29th November.
- Istanbul SGIA passenger movements continued to show steady growth and are trending with seasonal trend alike to pre-COVID movements. Passenger movements continued to record above 1 to 2 million passengers this year, registering 2.4million passenger movements for November 2021, reaching 83.7% of November 2019 passenger volume.

Passenger Movements ('000) Snapshot, November 2021

Total	2021 November	2020 November	% YOY	2021 Year- to-date	2020 Year- to-date	%YOY	2021 ¹LTM	2020 ¹LTM	%YOY
KLIA	821	114	623.1%	2,779	12,843	-78.4%	3,092	18,783	-83.5%
International	145	75	92.9%	1,009	8,159	-87.6%	1,083	12,501	-91.3%
ASEAN	52	23	126.0%	365	3,772	-90.3%	388	5,779	-93.3%
Non-ASEAN	93	52	78.4%	644	4,388	-85.3%	696	6,722	-89.7%
Domestic	676	39	1656.1%	1,770	4,684	-62.2%	2,009	6,283	-68.0%
MASB Airports	1,480	200	638.5%	4,815	11,845	-59.3%	5,575	15,899	-64.9%
International	4	3	70.2%	31	1,260	-97.6%	33	2,067	-98.4%
ASEAN	4	2	85.5%	29	827	-96.5%	31	1,325	-97.7%
Non-ASEAN	0.1	0.3	-62.4%	2	434	-99.5%	2.4	742	-99.7%
Domestic	1,475	198	645.8%	4,784	10,585	-54.8%	5,542	13,832	-59.9%
Total MAHB	2,301	314	632.9%	7,594	24,688	-69.2%	8,667	34,683	-75.0%
Istanbul SGIA²	2,420	1,516	59.6%	23,123	16,005	44.5%	24,324	18,873	28.9%
Total MAHB System	4,721	1,830	157.9%	30,717	40,693	-24.5%	32,991	53,555	-38.4%

International	2021	2020		2021	2020		2021	2020	
	November		% YOY	Year- to-date		%YOY	LTM		%YOY
KLIA	145	75	92.9%	1,009	8,159	-87.6%	1,083	12,501	-91.3%
ASEAN	52	23	126.0%	365	3,772	-90.3%	388	5,779	-93.3%
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Total KLIA & MASB	149	78	92.2%	1,039	9,420	-89.0%	1,117	14,567	-92.3%
ASEAN	56	25	122.3%	394	4,599	-91.4%	419	7,104	-94.1%
Non-ASEAN	93	52	77.7%	646	4,821	-86.6%	698	7,464	-90.6%
Istanbul SGIA	1,036	440	135.1%	7,887	4,888	61.4%	8,336	6,106	36.5%
Total MAHB System	1,185	518	128.7%	8,926	14,308	-37.6%	9,452	20,674	-54.3%

Domestic	2021	2020		2021	2020		2021	2020	
	November		% YOY	Year- to-date		%YOY	LTM		%YOY
KLIA	676	39	1656.1%	1,770	4,684	-62.2%	2,009	6,283	-68.0%
MASB Airports	1,475	198	645.8%	4,784	10,585	-54.8%	5,542	13,832	-59.9%
Total	2,152	236	810.5%	6,555	15,269	-57.1%	7,550	20,115	-62.5%
Istanbul SGIA	1,384	1,076	28.6%	15,236	11,117	37.1%	15,988	12,766	25.2%
Total MAHB System	3,536	1,312	169.4%	21,790	26,385	-17.4%	23,539	32,882	-28.4%

*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.

¹LTM refers to the last twelve months, up to and including the month in question

²Istanbul SGIA is Istanbul Sabiha Gokcen International Airport with the SAW three-letter International Air Transport Association (IATA) code

KLIA Main & klia2 Passenger Movements ('000) Snapshot , November 2021

Airport	2021	2020		2021	2020		2021	2020	
	November		% YOY	Year- to-date		%YOY	LTM		%YOY
KLIA Main Total	345	83	317.2%	1,534	5,907	-74.0%	1,648	8,810	-81.3%
International	132	65	101.3%	876	4,486	-80.5%	942	6,816	-86.2%
ASEAN	40	16	156.3%	244	1,563	-84.4%	260	2,445	-89.4%
Non-ASEAN	92	50	84.2%	632	2,923	-78.4%	682	4,371	-84.4%
Domestic	214	17	1133.3%	658	1,421	-53.7%	706	1,994	-64.6%
klia2 Total	476	31	1445.9%	1,244	6,936	-82.1%	1,444	9,974	-85.5%
International	13	10	35.7%	132	3,673	-96.4%	141	5,684	-97.5%
ASEAN	12	7.3	61.8%	121	2,208	-94.5%	128	3,334	-96.2%
Non-ASEAN	1	2.2	-50.0%	11	1,465	-99.2%	13	2,351	-99.4%
Domestic	463	21	2083.3%	1,112	3,263	-65.9%	1,303	4,289	-69.6%

Aircraft Movements Snapshot, November 2021

Total	2021	2020	% YOY	2021	2020	%YOY	2021	2020	2020
	November			Year- to-date			LTM		%YOY
KLIA	10,175	3,658	178.2%	60,360	118,612	-49.1%	66,277	154,800	-57.2%
MASB Airports	22,600	9,549	136.7%	132,774	208,724	-36.4%	148,308	252,532	-41.3%
Total	32,775	13,207	148.2%	193,134	327,336	-41.0%	214,585	407,332	-47.3%
Istanbul SGIA	16,291	11,885	37.1%	161,299	113,476	42.1%	170,616	132,030	29.2%
Total MAHB System	49,066	25,092	95.5%	354,433	440,812	-19.6%	385,201	539,362	-28.6%

International	2021	2020	% YOY	2021	2020	%YOY	2021	2020	%YOY
	November			Year- to-date			LTM		
KLIA	4,501	2,710	66.1%	39,017	73,780	-47.1%	41,981	98,372	-57.3%
MASB Airports	1,190	861	38.2%	11,312	21,668	-47.8%	12,257	28,313	-56.7%
Total	5,691	3,571	59.4%	50,329	95,448	-47.3%	54,238	126,685	-57.2%
Istanbul SGIA	7,109	3,605	97.2%	60,098	37,424	60.6%	63,858	45,604	40.0%
Total MAHB System	12,800	7,176	78.4%	110,427	132,872	-16.9%	118,096	172,289	-31.5%

Domestic	2021	2020	% YOY	2021	2020	%YOY	2021	2020	%YOY
	November			Year- to-date			LTM		
KLIA	5,674	948	498.5%	21,343	44,832	-52.4%	24,296	56,428	-56.9%
MASB Airports	21,410	8,688	146.4%	121,462	187,056	-35.1%	136,051	224,219	-39.3%
Total	27,084	9,636	181.1%	142,805	231,888	-38.4%	160,347	280,647	-42.9%
Istanbul SGIA	9,182	8,280	10.9%	101,201	76,052	33.1%	106,758	86,426	23.5%
Total MAHB System	36,266	17,916	102.4%	244,006	307,940	-20.8%	267,105	367,073	-27.2%

Traffic performance at Malaysia Airports Holdings Berhad's (MAHB) network of airports

MAHB network of airports recorded 4.7million passenger movements in November 2021, an increase of 157.9% over November 2020. International and domestic passenger movements recorded 1.2million and 3.5million passengers, an increase of 128.7% and 169.4% respectively, over November 2020. On a last-twelve-month basis, the total MAHB network of airports registered a contraction of 38.4% to 33.0million passengers. Overall aircraft movements increased by 95.5% with international and domestic movements increased by 78.4% and 102.4% over November 2020.

Airports in Malaysia registered 2.3million passengers in November 2021, an increase of 632.9% over November 2020. International and domestic passenger movements recorded 149,000 and 2.2million passengers, an increase of 92.2% and 810.5% respectively. Overall aircraft movements

increased by 148.2% with international and domestic aircraft movements increased by 59.4% and 181.1% respectively. Overall average passenger load factor for November 2021 was 62.2%, 5.5 percentage points higher than October 2021. Domestic average load factor was 68.8%, just 1.9 percentage points short from November 2019.

KLIA passenger movements recorded a 623.1% increase over November 2020 with 821,000 passenger movements. International and domestic passenger movements increased by 92.9% and 1656.1% with 145,000 and 676,000 passenger movements respectively. Passenger movements for ASEAN and non-ASEAN destinations increased by 126.0% and 78.4%, registering 52,000 and 93,000 passenger movements respectively. KLIA Main Terminal and klia2 passenger movements increased by 317.2% and 1445.9%, registering 345,000 and 476,000 passenger movements respectively. The last-twelve-month passenger movements for KLIA Main Terminal recorded 1.6million passengers, a contraction of 81.3%, while klia2 passenger movements contracted by 85.5% with 1.4million passengers over the same corresponding period last year. Overall aircraft movements at KLIA increased by 178.2% over the same month last year. International and domestic aircraft movements at KLIA showed an increase by 66.1% and 498.5% respectively. Overall November 2021 average passenger load factor for KLIA was 59.0%, 4.7 percentage points higher than October 2021. Domestic average load factor was 73.8%, just 0.4 percentage points short from November 2019.

Passenger movements at MASB Airports increased by 638.5% in November 2021 over November 2020. International and domestic passenger movements increased by 70.2% and 645.8% respectively. Aircraft movements in November 2021 increased by 136.7%. International and domestic aircraft movements grew by 38.2% and 146.4% respectively.

As of YTD November 2021, Istanbul SGIA passenger movements continued to register record traffic, reaching 69.9% of YTD November 2019 passenger volume. November 2021 passenger movements increased by 59.6% over November 2020, registering 2.4million passengers. International and domestic passenger movements increased by 135.1% and 28.6% with 1.0million and 1.4million passengers respectively. Total aircraft movements increased by 37.1%. International and domestic aircraft movements recorded an increase of 97.2% and 10.9% respectively over November 2020.

Overview of traffic

November 2021 passenger movements of 4.7million was the highest volume recorded for the network of airports since April 2020 after the first MCO was implemented in Malaysia from 18th March, and suspension of international flights in Turkey towards the end of March 2020. It is also encouraging to note that both Malaysia and Istanbul SGIA equally contributed to the encouraging

traffic with 2.3million and 2.4million passenger movements registered for November 2021 respectively.

Malaysia passenger movements was largely driven by the pent-up demand from domestic sector that recorded the highest volume since April 2020. November 2021 traffic increased by 2-fold compared to October 2021 following the lifting of interstate travel restrictions on 11th October. Average daily passengers increased from 44,000 to more than 71,000 in November. On the international front, there were encouraging signs of traffic building up on routes with relaxed travel rules. Average daily passenger movements for KLIA- Singapore VTL route jumped to more than 2,000 passengers daily since the first inaugural flight. Prior to VTL kick-off, the average passenger movements were 500 daily. There were 51 international destinations connected in November 2021 with the resumption of services to 5 city pairs, namely Madinah, Phuket, Don Mueang, Cam Ranh and Cebu.

Istanbul SGIA continued to sustain traffic above the 2million mark since June 2021, and the seasonal traffic signified in second half of 2021 is an encouraging sign that traffic is moving towards normalisation. Passenger movements for November reached 83.7% of November 2019 levels. Pegasus Airlines has added a new international service to Tabriz, Iran with four (4) times weekly flights from 26 November. Pegasus to-date is operating to thirty-four (34) domestic and sixty-nine (69) international destinations.

Both the Malaysia and Turkish governments are temporarily restricting travellers from South Africa, Botswana, Mozambique, Namibia, Lesotho, Eswatini, Malawi and Zimbabwe effective end November. Malaysia and Istanbul SGIA do not have direct flights to these countries. Turkey has started issuing mandatory quarantine for international arrivals from South Africa, while several airlines at Istanbul SGIA have temporarily suspended operations to Morocco. MAHB continues to closely monitor the latest development on the Omicron variant and its potential impact to global air travel as more countries begin to administer vaccine booster shots.

Research and Planning, MAHB
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