

Traffic Snapshot

- Total MAHB network of airports registered 36.1million passenger movements in 2021 with consistent growth month-on-month over 2020 since March 2021. A like-for-like comparison from April to December 2021 over the same corresponding period in 2020 shows traffic grew by 43% or an additional 9.0million passengers recorded.
- International and domestic passenger movements registered 10.3million and 25.7million passengers respectively. It is encouraging to note that December 2021 was the highest passenger volume recorded in a month since February 2020, reaching more than 5million passengers (5.3million).
- 2021 overall traffic continues to show signs of traffic recovery from COVID-19, albeit at different pace in Turkey and Malaysia. On the onset of relaxed travelling restrictions, domestic traffic leads the recovery and showed strong pent-up demand, facilitated by successful vaccination programmes that helped restore passenger's confidence for air travel. Growth in international traffic gradually began to show some improvements with more relaxed travel rules, acceptance of digital or vaccines certificates and travel bubbles such as Vaccinated Travel Lane (VTL).
- Promisingly, Istanbul SGIA traffic had rebounded just one year after the pandemic outbreak, recording a relatively stable growth month-on-month from March 2021 over the same corresponding period in 2020. Istanbul SGIA 2021 passenger movements grew by 47.4% reaching 25.4million passenger movements for the year, equivalent to 71.5% of 2019 passenger volumes. Turkey was also recognised by Airport Council International (ACI) as one of the fast-growing traffic performance countries in Europe, with Istanbul SGIA also ranked 8th out of the top 10 airports by passenger volume from ACI's Europe latest traffic report as of September 2021.
- Malaysia passenger movements gained momentum towards the last quarter of 2021 following relaxed travel rules, registering 6.7million passenger movements. International and domestic sector registered 1.4million and 9.4million passenger movements respectively in 2021. In December 2021, Malaysia passenger movements reached over 3million passengers for the first time since the outbreak of pandemic, recording 3.1million passengers and contributing 59% of MAHB's overall volume.
- Overall cargo movements for the network of airports remain robust for 2021 recording more than 1,000metric (1,064,910metric tonnes), a double-digit growth of 27.6% over 2020.
- Cargo movements in Malaysia recorded more than 1,000metric tonnes (1,013,829metric tonnes), surpassing 2014 cargo movements where the cargo volume first reached over 1,000metric tonnes (1,007metric tonnes).

Passenger Movements ('000) Snapshot, December 2021

Total	2021	2020	% YOY	2021	2020	%YOY
	December			Year- to-date		
KLIA	1,231	313	293.2%	4,011	13,156	-69.5%
International	316	75	322.6%	1,325	8,234	-83.9%
ASEAN	140	23	513.6%	505	3,795	-86.7%
Non-ASEAN	176	52	238.7%	820	4,440	-81.5%
Domestic	916	238	284.0%	2,686	4,922	-45.4%
MASB Airports	1,888	760	148.6%	6,713	12,605	-46.7%
International	5	2	92.1%	36	1,263	-97.2%
ASEAN	4.4	2	107.7%	33	829	-96.0%
Non-ASEAN	0.31	0.34	-6.8%	2	434	-99.4%
Domestic	1,883	757	148.8%	6,677	11,342	-41.1%
Total MAHB	3,119	1,073	190.8%	10,724	25,761	-58.4%
Istanbul SGIA²	2,234	1,202	85.9%	25,356	17,206	47.4%
Total MAHB System	5,353	2,274	135.4%	36,080	42,967	-16.0%

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Total KLIA & MASB	320	77	315.2%	1,361	9,497	-85.7%
ASEAN	144	25	478.9%	538	4,623	-88.4%
Non-ASEAN	176	52	237.1%	822	4,874	-83.1%
Istanbul SGIA	1,085	449	141.7%	8,972	5,337	68.1%
Total MAHB System	1,406	526	167.2%	10,333	14,834	-30.3%

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	December			Year- to-date		
KLIA	916	238	284.0%	2,686	4,922	-45.4%
MASB Airports	1,883	757	148.8%	6,677	11,342	-41.1%
Total	2,799	996	181.1%	9,363	16,264	-42.4%
Istanbul SGIA	1,148	753	52.6%	16,384	11,869	38.0%
Total MAHB System	3,947	1,748	125.8%	25,747	28,134	-8.5%

^{*}December 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 (SGIA) with the SAW three-letter International Air Transport Association (IATA) code

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

Airport	2021	2020	% YOY	2021	2020	%YOY
	December			Year- to-date		
KLIA Main Total	618	114	442.4%	2,153	6,021	-64.2%
<i>International</i>	268	66	306.9%	1,145	4,552	-74.8%
ASEAN	94	16	501.2%	339	1,579	-78.5%
Non-ASEAN	174	50	246.1%	806	2,973	-72.9%
<i>Domestic</i>	350	48	628.5%	1,008	1,469	-31.4%
klia2 Total	614	199	208.0%	1,858	7,135	-74.0%
<i>International</i>	48	9	440.5%	180	3,682	-95.1%
ASEAN	46	7	541.0%	166	2,215	-92.5%
Non-ASEAN	2.1	1.7	21.3%	14	1,467	-99.1%
<i>Domestic</i>	566	190	197.2%	1,678	3,453	-51.4%

Aircraft Movements Snapshot, December 2021

Total	2021	2020	% YOY	2021	2020	%YOY
	December			Year- to-date		
KLIA	12,979	5,917	119.4%	73,339	124,529	-41.1%
MASB Airports	27,168	15,534	74.9%	160,425	224,258	-28.5%
Total	40,147	21,451	87.2%	233,764	348,787	-33.0%
Istanbul SGIA	15,855	9,317	70.2%	177,154	122,793	44.3%
Total MAHB System	56,002	30,768	82.0%	410,918	471,580	-12.9%

International	2021	2020	% YOY	2021	2020	%YOY
	December			Year- to-date		
KLIA	5,322	2,964	79.6%	44,339	76,744	-42.2%
MASB Airports	1,260	945	33.3%	12,621	22,613	-44.2%
Total	6,582	3,909	68.4%	56,960	99,357	-42.7%
Istanbul SGIA	7,844	3,760	108.6%	67,942	41,184	65.0%
Total MAHB System	14,426	7,669	88.1%	124,902	140,541	-11.1%

Domestic	2021	2020	% YOY	2021	2020	%YOY
	December			Year- to-date		
KLIA	7,657	2,953	159.3%	29,000	47,785	-39.3%
MASB Airports	25,908	14,589	77.6%	147,804	201,645	-26.7%
Total	33,565	17,542	91.3%	176,804	249,430	-29.1%
Istanbul SGIA	8,011	5,557	44.2%	109,212	81,609	33.8%
Total MAHB System	41,576	23,099	80.0%	286,016	331,039	-13.6%

Overview of traffic

The 2021 passenger movements in Malaysia and Turkey showed resilience and was above the expected targets estimated by MAHB. Passenger movements recorded high volume towards the last quarter of 2021, surpassing 5-million mark for the first time since the first travel restrictions were enforced from March 2020. Successful vaccination rates had partially facilitated traffic recovery as confidence to travel builds up and travel restrictions were lifted. A like-for-like comparison from April to December 2021 over the same corresponding period in 2020 shows traffic grew by 43% or an additional 9.0million passengers recorded.

Malaysia traffic recovery shows resilience with strong pent-up demand following each easing of the Movement Control Orders (MCOs). The introduction of the Langkawi travel bubble from 16th September with relaxed travel rules proved that passenger have regained confidence to travel by air. The demand to travel once again showed optimism when the interstate travel ban was lifted from 11th October with resumption of traffic immediately reaching 50%-60% average load factors. Top 5 international destinations recorded in 2021 were Singapore, Dubai, Jakarta, Doha and Dhaka. As for 4Q21, passenger movements for Europe, Middle East, South Asia, Southeast Asia, and Southwest Pacific regions recorded between 20% to 200% growth over the same period in 2020. There were 51 airlines operating in 2021 to 57 international and 31 domestic destinations compared to 78 airlines to 144 internationals and 34 domestic destinations in 2019. Overall average load factor in 2021 recorded 51.6%, with higher average load factor for the last quarter of 2021 (4Q21) at 60.8%. December 2021 registered the highest average load factor for the year at 63.4%.

Istanbul SGIA traffic rebound was more apparent within a year after WHO declared the COVID-19 outbreak as a global pandemic. Travel restrictions were lifted gradually from the end of the first quarter in 2021, in anticipation of the peak summer season and the high vaccination rates. The equivalent acceptance of the EU Digital COVID certificate and Turkish COVID-19 certificate had helped fuelled passenger movements to and within Turkey. Average load factor for 2021 reached 75.0% with international and domestic registered at 70.0% and 79.0% respectively.

Istanbul SGIA was also recognised as one of the fastest-growing airports in the above 25million passenger's category and ranked eight (8th) busiest airports based on passenger movements performance by ACI Europe in September 2021. The ratio of international to domestic passenger movements was in the average of 35%:65% for 2021 compared to 40%:60% in 2019. There were 44 airlines operating in 2021 to 107 international and 37 domestic destinations compared to 59 airlines operated in 2019 to 137 international and 37 domestic destinations.

Conclusion

The Malaysian Government has forecasted Malaysia's GDP to grow between 5.5% to 6.5% in 2022. The International Monetary Fund (IMF) had recently revised its 2022 global GDP forecast at 4.9%. The positive growth of global GDP would continue to facilitate cargo movements on the back of the momentum gained in 2021 due to an increase in e-commerce, pharmaceutical and medical equipment supplies. The International Air Transport Association (IATA) has revised 2022 Asia Pacific and Europe passenger to reach 52.7% and 59.2% pre-2019 level respectively. IATA has also indicated a 4.9% growth for air cargo for 2022. Airport Council International (ACI) has forecasted Asia Pacific and Europe's passenger movements at 66.3% and 68.3% pre-2019 level.

Despite the on-going uncertainties due to the new emergence of variants of concern (VOC), MAHB is cautiously optimistic in forecasting gradual traffic recovery in 2022. The Malaysia Aviation Commission's (MAVCOM) Waypoint Report issued in December 2021 forecasted passenger movements for 2022 to reach between 32.6million to 49.0million or 30% to 45% of 2019 passenger movements driven predominantly by flights to domestic and ASEAN markets.

The temporary flight suspension of SIN-KUL VTL flights from 23rd December 2021, Umrah trips from 8th January 2022, travel restrictions from selected Africa countries and temporary flight restrictions are some of the approaches taken by the Malaysian and Turkish governments respectively in response to the emerging Omicron variant. Nevertheless, up to the first week of January 2022, the daily average traffic for the network of airports continued to sustain similar average daily traffic registered in December 2021. Although cautiously optimistic on the continued recovery, MAHB is closely monitoring the developments of the VOC, booster vaccines efficacy and travel restrictions to traffic recovery.

Research and Planning, MAHB

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