

Traffic Snapshot

- MAHB network of airports ended the year on a positive note recording 83.9million passengers and reaching 59.4% of 2019 levels, primarily against a backdrop of favourable conditions for traffic recovery. The high vaccination rates and effectiveness in preventing severe illness and hospitalisation have propelled more countries to ease travel restrictions and helped induced air travel demand that was suppressed by the border closures in 2020 and 2021.
- International and domestic passenger movements reached 47.7% and 70.1% of 2019 levels with 32.2million and 51.6million passengers respectively.
- December 2022 recorded the highest monthly passenger movements since February 2020 with 9.5million passengers, reaching 74.0% of 2019 levels.
- Malaysia passenger movements fared equally well in 2022, recording 52.7million passengers reaching 50.0% of 2019 level. The reopening of international borders from 1 April 2022 was a significant milestone for Malaysia and was in line with other countries in the region in easing travel restrictions.
- Malaysia domestic passenger movements recovery momentum continued in 2022 after the lifting of interstate travel ban on 11 October 2021, recording 36.2million passengers for the year, reaching 69.6% of 2019 levels. International passenger movements recorded a modest movement of 16.5million passengers amid the gradual lifting of travel restrictions in other countries such as Japan, Taiwan, Australia and Indonesia. December 2022 international passenger movements of 2.9million was the highest recorded to-date since the border reopened in April.
- The recent announcement on China's reopening of borders from 8 January 2023 also provides further optimism for a better recovery in the international sector for 2023.
- Istanbul SGIA ended the year strong with 31.2million passenger movements equivalent to 86.7% of 2019 levels facilitated by less rigorous travel restrictions in the region. International passengers increased by 75.1% with 15.7million passengers. It is noteworthy that international passenger movements have surpassed 2019 level, recording a growth of 10.4% over the corresponding period in 2019.
- Overall cargo movements for the network of airports remained resilient for 2022, registering a growth of 3.6% to 1,063 metric tonnes over 2021. Domestic cargo recorded a double-digit growth of 11.3% over 2021 to 302,229 metric tonnes, while international cargo movements recorded 0.9% growth to 760,931 metric tonnes.

Passenger movements ('000) snapshot, December 2022

Total	2022 December	2021	% YOY	2022 Year- to-date	2021	%YOY
KLIA	3,701	1,232	200.3%	25,377	4,012	532.6%
International	2,446	317	672.5%	14,252	1,326	975.0%
ASEAN	1,294	140	822.8%	7,487	506	1380.3%
Non-ASEAN	1,152	176	552.9%	6,766	820	725.0%
Domestic	1,255	916	37.1%	11,125	2,686	314.2%
MASB Airports	3,087	1,898	62.7%	27,302	6,726	305.9%
International	416	5	8661.0%	2,252	36	6204.7%
ASEAN	369	4	8247.5%	2,101	33	6215.0%
Non-ASEAN	47	0.3	14269.9%	152	2	6065.5%
Domestic	2,671	1,893	41.1%	25,049	6,691	274.4%
Total MAHB	6,788	3,130	116.9%	52,679	10,738	390.6%
Istanbul SGIA²	2,728	2,234	22.1%	31,180	25,356	23.0%
Total MAHB System	9,516	5,364	77.4%	83,858	36,094	132.3%

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Total KLIA & MASB	2,862	321	790.5%	16,505	1,362	1112.2%
ASEAN	1,663	145	1049.8%	9,587	539	1678.7%
Non-ASEAN	1,198	177	578.2%	6,918	823	741.0%
Istanbul SGIA	1,498	1,085	38.0%	15,711	8,972	75.1%
Total MAHB System	4,360	1,407	209.9%	32,216	10,334	211.8%

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KLIA	1,255	916	37.1%	11,125	2,686	314.2%
MASB Airports	2,671	1,893	41.1%	25,049	6,691	274.4%
Total	3,927	2,809	39.8%	36,174	9,377	285.8%
Istanbul SGIA	1,230	1,148	7.1%	15,468	16,384	-5.6%
Total MAHB System	5,157	3,957	30.3%	51,642	25,761	100.5%

*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

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, December 2022

Airport	2022 December	2021 December	% YOY	2022 Year- to-date	2021 Year- to-date	%YOY
KLIA Main Total	1,972	619	218.7%	13,315	2,153	518.3%
<i>International</i>	<i>1,484</i>	<i>269</i>	<i>451.9%</i>	<i>9,066</i>	<i>1,146</i>	<i>691.4%</i>
ASEAN	560	95	491.0%	3,252	340	857.7%
Non-ASEAN	925	174	430.6%	5,815	806	621.4%
<i>Domestic</i>	<i>487</i>	<i>350</i>	<i>39.3%</i>	<i>4,249</i>	<i>1,008</i>	<i>321.6%</i>
klia2 Total	1,729	614	181.8%	12,062	1,858	549.0%
<i>International</i>	<i>961</i>	<i>48</i>	<i>1919.0%</i>	<i>5,186</i>	<i>180</i>	<i>2776.8%</i>
ASEAN	734	46	1512.7%	4,235	166	2447.6%
Non-ASEAN	227	2	10876.9%	951	14	6674.6%
<i>Domestic</i>	<i>768</i>	<i>566</i>	<i>35.7%</i>	<i>6,876</i>	<i>1,678</i>	<i>309.7%</i>

Aircraft movements snapshot, December 2022

Total	2022 December	2021 December	% YOY	2022 Year- to-date	2021 Year- to-date	%YOY
KLIA	23,919	13,134	82.1%	198,378	73,673	169.3%
MASB Airports	32,726	28,258	15.8%	351,364	161,678	117.3%
Total	56,645	41,392	36.9%	549,742	235,351	133.6%
Istanbul SGIA	16,846	15,855	6.3%	195,388	177,154	10.3%
Total MAHB System	73,491	57,247	28.4%	745,130	412,505	80.6%

International	2022 December	2021 December	% YOY	2022 Year- to-date	2021 Year- to-date	%YOY
KLIA	15,301	5,431	181.7%	110,875	44,608	148.6%
MASB Airports	4,179	1,338	212.3%	32,240	12,727	153.3%
Total	19,480	6,769	187.8%	143,115	57,335	149.6%
Istanbul SGIA	9,124	7,844	16.3%	100,639	67,942	48.1%
Total MAHB System	28,604	14,613	95.7%	243,754	125,277	94.6%

Domestic	2022 December	2021 December	% YOY	2022 Year- to-date	2021 Year- to-date	%YOY
KLIA	8,618	7,703	11.9%	87,503	29,065	201.1%
MASB Airports	28,547	26,920	6.0%	319,124	148,951	114.2%
Total	37,165	34,623	7.3%	406,627	178,016	128.4%
Istanbul SGIA	7,722	8,011	-3.6%	94,749	109,212	-13.2%
Total MAHB System	44,887	42,634	5.3%	501,376	287,228	74.6%

Overview of traffic

MAHB network of airports recorded 83.9million passenger movements in year 2022, marking the first full year of traffic recovery since border closures in March 2020. The traffic recovery outcome was supported by higher vaccination rates and its effectiveness followed by traveller's confidence to travel, the easing of travel restrictions particularly for the Asia region, resumptions of airlines operations and new routes. The recent announcement on China's reopening of borders also provides further optimism for better growth in the international sector in 2023.

Malaysia recorded a significant 52.7million passengers in 2022. December 2022 recorded the highest passenger movements in a month with 6.8million passengers, reaching 67.9% 2019 levels. Malaysia's positive traffic development was mainly driven by the reopening of Malaysia's borders from 1 April 2022, the relaxation of COVID-19 Standard Operation Procedures for travellers from 1 May 2022, followed by the country's transition to an endemic phase from 1 April 2022. 17 airlines resumed services to 32 city pairs in 2022 with the highest traffic operated to Thailand, Indonesia, Philippines, South Korea, Vietnam, and India.

The growth in passenger movements at Malaysia Airports was also supported by the introduction of new routes by 27 airlines to 38 city pairs. Among the city pair with the highest growth in 2022 over 2021 are Denpasar-Bali, Lahore, Ujung Padang, Male, Brisbane, Bangkok, Perth, Phuket, Batam and Bangalore. There were 59 airlines operating at all airports managed by Malaysia Airports to 84 international and 35 domestic destinations, compared to 48 airlines to 51 internationals and 32 domestic destinations in 2021. The average load factor recorded in 2022 was 71.3% compared to 51.7% in 2021, with December 2022 having the highest average load factor at 80.6%.

Istanbul SGIA passenger movements recorded 31.2million passengers reaching 86.7% of 2019 levels. International passenger movements surpassed 2019 levels with 10.4% growth over 2019, while the domestic passenger movements recorded 15.5million passengers, reaching 71.2% of 2019 levels. International to domestic passenger movements ratio improved in 2022 at 50.4:49.6 compared to 35.4:64.6 in 2021. The highest passenger movements were recorded in the month of August primarily driven by the summer holidays. Istanbul SGIA international aircraft movements recorded a growth of 48.1% over 2021 with a slight decrease in the domestic aircraft movements, mainly due to airlines restructuring network expansions to international sector.

Conclusion

The International Air Transport Association (IATA) in their December 2022 latest revision indicated that Asia Pacific and global passengers in 2023 are expected to reach 70.8% and 85.5% pre-2019 levels respectively. Airport Council International (ACI) forecasted Asia Pacific region full recovery will be by the end of 2024 as the air recovery still lags other regions in the world. ACI also forecasted global passengers for 2023 to reach 74% of 2019 level. The Malaysia Aviation Commission's (MAVCOM) Waypoint Report issued in December 2022 forecasted passenger movements for 2023 to grow by 40% to 52% or between 74.6million to 80.8million passengers. The latest 2023 seat capacity filing for Malaysia just before China's announcement shows a 44% increase over 2021 or reaching 76% of 2019 levels, while Istanbul SGIA shows a 4.2% increase. The positive development in seat capacity filings provides optimism that 2023 traffic is on course for a continuing recovery. The return of Chinese travellers followed by the reopening of China borders is expected to boost international traffic as China continues to lift bans and ease travel restrictions.

Research and Planning, MAHB

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