

## Traffic snapshot

- Total MAHB network of airports (including Istanbul SGIA) registered 9.1% growth for March 2017 with 10.5million passenger traffic.
- International passengers registered a 10.9% growth at 4.7million passengers in March, while domestic passengers grew by 7.7% with 5.7million passengers.
- On a twelve month basis, the 120.7million passengers recorded is the highest for the network.
- Q1 passenger traffic registered 7.5% growth with 30.0million passengers. International traffic grew by 9.5% while domestic grew by 5.9%.
- Malaysia passenger traffic grew by 10.6% in March 2017 with load factors at 76.0%. International traffic grew by 12.4% while domestic traffic grew by 9.0%.
- ASEAN and non-ASEAN traffic registered growth of 8.4% and 16.4% respectively in March 2017.
- KLIA Main Terminal double digit growth streak continues with 23.0% recorded over March 2016 passenger numbers.
- Istanbul SGIA recorded the first positive growth for both international and domestic traffic since experiencing its first negative for international in June 2016.

Passenger Traffic Snapshot ('000), March 2017

Total	2017	2016	% YOY	2017	2016	%YOY	2017	2016	%YOY
	March	March		Year- to-date	Year- to-date		'LTM	'LTM	
<b>KLIA</b>									
<b>Total</b>	<b>4,843</b>	<b>4,281</b>	<b>13.1%</b>	<b>14,104</b>	<b>12,510</b>	<b>12.7%</b>	<b>54,237</b>	<b>49,472</b>	<b>9.6%</b>
<b>International</b>	<b>3,407</b>	<b>3,012</b>	<b>13.1%</b>	<b>10,085</b>	<b>8,958</b>	<b>12.6%</b>	<b>38,310</b>	<b>35,132</b>	<b>9.0%</b>
- ASEAN	1,611	1,423	13.2%	4,686	4,169	12.4%	17,875	16,584	7.8%
- Non-ASEAN	1,796	1,589	13.0%	5,399	4,789	12.7%	20,434	18,549	10.2%
<b>Domestic</b>	<b>1,436</b>	<b>1,269</b>	<b>13.2%</b>	<b>4,019</b>	<b>3,553</b>	<b>13.1%</b>	<b>15,928</b>	<b>14,340</b>	<b>11.1%</b>
<b>MASB Airports</b>									
<b>Total</b>	<b>3,250</b>	<b>3,035</b>	<b>7.1%</b>	<b>9,281</b>	<b>8,659</b>	<b>7.2%</b>	<b>36,955</b>	<b>35,118</b>	<b>5.2%</b>
<b>International</b>	<b>540</b>	<b>499</b>	<b>8.1%</b>	<b>1,607</b>	<b>1,483</b>	<b>8.4%</b>	<b>6,235</b>	<b>5,524</b>	<b>12.9%</b>
- ASEAN	297	337	-11.8%	919	958	-4.1%	3,854	3,733	3.2%
- Non-ASEAN	243	162	49.5%	688	524	31.2%	2,381	1,790	33.0%
<b>Domestic</b>	<b>2,710</b>	<b>2,536</b>	<b>6.9%</b>	<b>7,674</b>	<b>7,176</b>	<b>6.9%</b>	<b>30,720</b>	<b>29,594</b>	<b>3.8%</b>
<b>Total MAHB</b>	<b>8,092</b>	<b>7,316</b>	<b>10.6%</b>	<b>23,385</b>	<b>21,169</b>	<b>10.5%</b>	<b>91,193</b>	<b>84,590</b>	<b>7.8%</b>
<b>Istanbul SGIA<sup>2</sup></b>	<b>2,367</b>	<b>2,273</b>	<b>4.1%</b>	<b>6,574</b>	<b>6,703</b>	<b>-1.9%</b>	<b>29,523</b>	<b>29,381</b>	<b>0.5%</b>
<b>Total MAHB System</b>	<b>10,460</b>	<b>9,589</b>	<b>9.1%</b>	<b>29,960</b>	<b>27,872</b>	<b>7.5%</b>	<b>120,716</b>	<b>113,971</b>	<b>5.9%</b>

International	2017	2016	% YOY	2017	2016	%YOY	2017	2016	%YOY
	March	March		Year- to-date	Year- to-date		LTM	LTM	
<b>KLIA</b>	<b>3,407</b>	<b>3,012</b>	<b>13.1%</b>	<b>10,085</b>	<b>8,958</b>	<b>12.6%</b>	<b>38,310</b>	<b>35,132</b>	<b>9.0%</b>
ASEAN	1,611	1,423	13.2%	4,686	4,169	12.4%	17,875	16,584	7.8%
Non-ASEAN	1,796	1,589	13.0%	5,399	4,789	12.7%	20,434	18,549	10.2%
<b>MASB Airports</b>	<b>540</b>	<b>499</b>	<b>8.1%</b>	<b>1,607</b>	<b>1,483</b>	<b>8.4%</b>	<b>6,235</b>	<b>5,524</b>	<b>12.9%</b>
ASEAN	297	337	-11.8%	919	958	-4.1%	3,854	3,733	3.2%
Non-ASEAN	243	162	49.5%	688	524	31.2%	2,381	1,790	33.0%
<b>Total KLIA &amp; MASB</b>	<b>3,947</b>	<b>3,511</b>	<b>12.4%</b>	<b>11,692</b>	<b>10,440</b>	<b>12.0%</b>	<b>44,545</b>	<b>40,656</b>	<b>9.6%</b>
ASEAN	1,908	1,760	8.4%	5,605	5,127	9.3%	21,730	20,317	7.0%
Non-ASEAN	2,039	1,751	16.4%	6,087	5,313	14.6%	22,815	20,339	12.2%
<b>Istanbul SGIA</b>	<b>768</b>	<b>742</b>	<b>3.6%</b>	<b>2,123</b>	<b>2,181</b>	<b>-2.7%</b>	<b>9,475</b>	<b>9,940</b>	<b>-4.7%</b>
<b>Total MAHB System</b>	<b>4,715</b>	<b>4,253</b>	<b>10.9%</b>	<b>13,816</b>	<b>12,622</b>	<b>9.5%</b>	<b>54,020</b>	<b>50,596</b>	<b>6.8%</b>

Domestic	2017	2016	% YOY	2017	2016	%YOY	2017	2016	%YOY
	March	March		Year- to-date	Year- to-date		LTM	LTM	
KLIA	1,436	1,269	13.2%	4,019	3,553	13.1%	15,928	14,340	11.1%
MASB Airports	2,710	2,536	6.9%	7,674	7,176	6.9%	30,720	29,594	3.8%
<b>Total</b>	<b>4,145</b>	<b>3,804</b>	<b>9.0%</b>	<b>11,693</b>	<b>10,729</b>	<b>9.0%</b>	<b>46,648</b>	<b>43,934</b>	<b>6.2%</b>
<b>Istanbul SGIA</b>	<b>1,599</b>	<b>1,531</b>	<b>4.4%</b>	<b>4,451</b>	<b>4,522</b>	<b>-1.6%</b>	<b>20,048</b>	<b>19,441</b>	<b>3.1%</b>
<b>Total MAHB System</b>	<b>5,744</b>	<b>5,336</b>	<b>7.7%</b>	<b>16,144</b>	<b>15,250</b>	<b>5.9%</b>	<b>66,696</b>	<b>63,375</b>	<b>5.2%</b>

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

<sup>1</sup>LTM refers to the last twelve months, up to and including the month in question

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

#### KLIA Main & klia2 Passenger Traffic Snapshot ('000), March 2017

Airport	2017	2016	% YOY	2017	2016	%YOY	2017	2016	%YOY
	March	March		Year- to-date	Year- to-date		LTM	LTM	
<b>KLIA Main</b>									
<b>Total</b>	<b>2,374</b>	<b>1,930</b>	<b>23.0%</b>	<b>6,933</b>	<b>5,315</b>	<b>30.4%</b>	<b>27,142</b>	<b>21,987</b>	<b>23.4%</b>
<b>International</b>	<b>1,766</b>	<b>1,453</b>	<b>21.6%</b>	<b>5,225</b>	<b>4,085</b>	<b>27.9%</b>	<b>20,090</b>	<b>17,037</b>	<b>17.9%</b>
- ASEAN	682	509	34.0%	1,975	1,330	48.5%	7,579	5,634	34.5%
- Non-ASEAN	1,084	944	14.9%	3,250	2,755	18.0%	12,512	11,403	9.7%
<b>Domestic</b>	<b>607</b>	<b>477</b>	<b>27.2%</b>	<b>1,708</b>	<b>1,230</b>	<b>38.9%</b>	<b>7,052</b>	<b>4,950</b>	<b>42.5%</b>
<b>klia2</b>									
<b>Total</b>	<b>2,469</b>	<b>2,350</b>	<b>5.0%</b>	<b>7,172</b>	<b>7,196</b>	<b>-0.3%</b>	<b>27,095</b>	<b>27,485</b>	<b>-1.4%</b>
<b>International</b>	<b>1,641</b>	<b>1,559</b>	<b>5.2%</b>	<b>4,860</b>	<b>4,873</b>	<b>-0.3%</b>	<b>18,219</b>	<b>18,095</b>	<b>0.7%</b>
- ASEAN	929	914	1.6%	2,711	2,839	-4.5%	10,297	10,950	-6.0%
- Non-ASEAN	712	645	10.4%	2,149	2,034	5.7%	7,922	7,146	10.9%
<b>Domestic</b>	<b>828</b>	<b>791</b>	<b>4.7%</b>	<b>2,311</b>	<b>2,323</b>	<b>-0.5%</b>	<b>8,876</b>	<b>9,389</b>	<b>-5.5%</b>

**Aircraft Traffic Snapshot, March 2017**

Total	2017	2016	% YOY	2017	2016	%YOY	2017	2016	%YOY
	March			Year- to-date			LTM		
KLIA	32,462	29,888	8.6%	93,045	87,364	6.5%	361,200	352,220	2.5%
MASB Airports	37,604	38,403	-2.1%	113,549	112,266	1.1%	457,348	458,732	-0.3%
<b>Total</b>	<b>70,066</b>	<b>68,291</b>	<b>2.6%</b>	<b>206,594</b>	<b>199,630</b>	<b>3.5%</b>	<b>818,548</b>	<b>810,952</b>	<b>0.9%</b>
Istanbul SGIA	16,676	17,849	-6.6%	47,440	51,022	-7.0%	216,708	216,171	0.2%
<b>Total MAHB System</b>	<b>86,742</b>	<b>86,140</b>	<b>0.7%</b>	<b>254,034</b>	<b>250,652</b>	<b>1.3%</b>	<b>1,035,256</b>	<b>1,027,123</b>	<b>0.8%</b>

International	2017	2016	% YOY	2017	2016	%YOY	2017	2016	%YOY
	March			Year- to-date			LTM		
KLIA	21,677	19,976	8.5%	62,202	58,851	5.7%	242,554	237,465	2.1%
MASB Airports	4,976	4,898	1.6%	14,855	14,469	2.7%	59,297	56,905	4.2%
<b>Total</b>	<b>26,653</b>	<b>24,874</b>	<b>7.2%</b>	<b>77,057</b>	<b>73,320</b>	<b>5.1%</b>	<b>301,851</b>	<b>294,370</b>	<b>2.5%</b>
Istanbul SGIA	5,929	6,580	-9.9%	17,126	18,954	-9.6%	78,154	80,171	-2.5%
<b>Total MAHB System</b>	<b>32,582</b>	<b>31,454</b>	<b>3.6%</b>	<b>94,183</b>	<b>92,274</b>	<b>2.1%</b>	<b>380,005</b>	<b>374,541</b>	<b>1.5%</b>

Domestic	2017	2016	% YOY	2017	2016	%YOY	2017	2016	%YOY
	March			Year- to-date			LTM		
KLIA	10,785	9,912	8.8%	30,843	28,513	8.2%	118,646	114,755	3.4%
MASB Airports	32,628	33,505	-2.6%	98,694	97,797	0.9%	398,051	401,827	-0.9%
<b>Total</b>	<b>43,413</b>	<b>43,417</b>	<b>0.0%</b>	<b>129,537</b>	<b>126,310</b>	<b>2.6%</b>	<b>516,697</b>	<b>516,582</b>	<b>0.0%</b>
Istanbul SGIA	10,747	11,269	-4.6%	30,314	32,068	-5.5%	138,554	136,000	1.9%
<b>Total MAHB System</b>	<b>54,160</b>	<b>54,686</b>	<b>-1.0%</b>	<b>159,851</b>	<b>158,378</b>	<b>0.9%</b>	<b>655,251</b>	<b>652,582</b>	<b>0.4%</b>

**Traffic performance for MAHB's network of airports**

MAHB's network of airports (including Istanbul SGIA) recorded 10.5million passengers in March 2017, a 9.1% growth over March 2016. International traffic recorded 4.7million passengers with a year-on-year increase of 10.9% while domestic traffic improved by 7.7% recording 5.7million passengers compared to March 2016. On a last-twelve-month basis, the total MAHB network (inclusive of Istanbul SGIA) registered 5.9% growth with 120.7million passengers. This is the highest traffic handled in a 12-month period by the network. Overall aircraft movements increased by 0.7% with international movements registering an increase of 3.6% while domestic contracted by 1.0% over March 2016.

On the local front, airports in Malaysia registered 8.1million passengers in March 2017, a 10.6% year-on-year growth over March 2016. International sector recorded 3.9million passengers with a 12.4% increase while the domestic sector recorded 4.1million passengers, representing a growth of 9.0%. International traffic for ASEAN countries grew 8.4% to 1.9million passengers whereas non-ASEAN traffic posted a 16.4% growth to 2.0million passengers. Overall aircraft movements increased by 2.6%. International aircraft movements grew by 7.2% while domestic movements remained stagnant

over March 2016. Overall average load factors improved to 76.0% in March 2017, an increase by 2.3 percentage points compared with the same month last year.

KLIA passenger movements recorded a 13.1% increase in March 2017 registering 4.8million passenger movements over March 2016. A total of 1.6million passengers was recorded for ASEAN sector with a 13.2% growth while 1.8million passengers were recorded for non-ASEAN (13.0% growth). 1.4million passengers were recorded for domestic sector representing a growth of 13.2%. March traffic for KLIA Main Terminal grew by 23.0% while klia2 grew by 5.0%. The last-twelve-month passenger traffic for KLIA Main Terminal recorded 27.1million passengers which is an increase of 23.4% while klia2 recorded a decline of 1.4% at 27.1million passengers over the corresponding period last year. Overall aircraft movements at KLIA increased by 8.6% over the same month last year. International aircraft movements at KLIA registered an increase of 8.5% while domestic aircraft movements registered a growth of 8.8%.

Passenger traffic for MASB Airports improved by 7.1% year-on-year over March 2016 with 3.2million passengers in March 2017. International passenger movements grew by 8.1% recording 0.5million, ASEAN traffic declined by 11.8% in March 2017 while non-ASEAN traffic increased by 49.5%. The decline in ASEAN traffic for MASB Airports was due to decline in traffic from the Philippines, Brunei, Indonesia, Thailand and Myanmar. On the other hand, traffic from South Korea, China, Japan, Taiwan and Australia contributed to the non-ASEAN growth.

Istanbul SGIA passengers increased by 4.1% to 2.4million in March 2017. Both international and domestic sectors improved by 3.6% (0.8million passengers) and 4.4% (1.6million passengers) respectively. Over the last twelve months, total passengers grew by 0.5% with 29.5million. International passenger traffic declined by 4.7% while domestic improved by 3.1%.

### **First Quarter Traffic**

MAHB's network of airports (including Istanbul SGIA) recorded 30.0million passengers in Q1 2017 representing a growth of 7.5% over Q1 2016. International traffic improved by 9.5% to 13.8million passengers while domestic passengers increased by 5.9% with 16.1million passengers. Correspondingly, aircraft movements improved by 1.3% with international and domestic increasing by 2.1% and 0.9% respectively.

Airports in Malaysia registered a 10.5% growth with 23.4million passenger traffic. Passenger numbers were evenly proportioned between international and domestic with 11.7million each,

representing growth of 12.0% and 9.0% respectively. Aircraft movements grew by 3.5% in Q1 2017 with international movements improving by 5.1% and domestic movements growing by 2.6% respectively.

Growth for airports in Malaysia was mainly contributed by KLIA with 12.7% growth (14.1million passengers) in Q1 2017. International traffic stood at 10.1million passengers representing a 12.6% growth over Q1 2016. ASEAN traffic grew by 12.4% with 4.7million passengers while non-ASEAN increased by 12.7% with 5.4million passengers. Domestic traffic registered 13.1% improvement with 4.0million passengers. KLIA growth in Q1 2017 was mainly contributed by KLIA Main Terminal by 30.4% to 6.9million passengers. International traffic stood at 5.2million passengers for KLIA Main Terminal representing a 27.9% growth. ASEAN traffic improved by 48.5% to 2.0million while non-ASEAN grew 18.0% with 3.2million. Domestic recorded 1.7million passengers for a 38.9% growth. Traffic in klia2 declined by 0.3% to 7.2million passengers with international and domestic traffic declining by 0.3% (4.9million passengers) and 0.5% (2.3million passengers) respectively. The decline in klia2 international traffic was driven by a 4.5% reduction in ASEAN traffic to 2.7million passengers, despite an increase in non-ASEAN by 5.7% to 2.1million passengers.

Passenger traffic in Istanbul SGIA decreased in Q1 2017. Total passenger traffic stood at 6.6million, a 1.9% reduction over Q1 2016. International traffic declined by 2.7% with 2.1million passengers while domestic declined by 1.6% with 4.5million.

## **Overview of traffic**

The overall increase in passengers was contributed by growth in airline seats and an improvement in average load factors. All but one of the regions registered double-digit growth in March for international traffic following the trend set in February. Passenger traffic to and from 21 countries registered double-digit growth in March 2017 including United Kingdom, New Zealand, South Korea, Japan, Taiwan and Vietnam which registered more than 20% growth. 20 countries registered double-digit passenger traffic growth in Q1 2017 that include the aforementioned countries. 24 airlines registered double-digit growth in March 2017 and Q1 2017 for international passenger traffic. This includes AirAsia X, All Nippon Airways, Malindo Air, China Airlines, Saudi Arabian Airlines and also Malaysia Airlines Berhad among others. The sectoral and nationality composition indicates a new level of growth contributed by among others visa relaxation, currency advantage, tourism promotional efforts and trade. There was also increase in Malaysian outbound travel. The domestic passenger growth was mainly contributed by Malindo Air and AirAsia. Based on the current growth trend, there

are optimistic signs that airports in Malaysia is poised to achieve a growth rate above the 6.5% target set for 2017.

Istanbul SGIA Q1 2017 traffic performance has achieved the first positive in March 2017 and the trend is likely to continue.

*Research and Planning, MAHB*

*10 April 2017*