

Traffic Snapshot

- The year 2024 witnessed a significant milestone for MAHB's network of airports, as total passenger movements exceeded expectations, recording a 96.1% recovery rate against pre-pandemic levels at 135 million passengers driven by strong international traffic across both Malaysia and Türkiye operations.
- It is encouraging to note that the international passenger movements for the network of airports have exceeded the pre-pandemic level with a growth of 6.3%, recording 71.8 million passengers.
- Domestic passenger movements reached 86.8% of 2019 levels, with 63.9 million passengers.
- The robust growth in 2024 was driven by consistent high air travel demand buoyed up by the easing of fuel price and inflation, increased in trade and business activities, favourable travel policy on visa waiver, along with airlines expansion services in resuming, adding, and introducing new flights frequencies against a challenging backdrop.
- On the local front, airports managed by MAHB in Malaysia recorded strong traffic performance with 93.8 million total passenger movements, reaching 89.1% of 2019 levels.
- Traffic in Malaysia continued to show buoyancy amidst a challenging supply chain condition, resulting in the delay of new aircraft deliveries, backlog in maintenance, repair, and overhaul (MRO) services stemming from global supply chain disruptions on aircraft parts and engines.
- Malaysia international passenger movements trailing closely to pre-pandemic trends of which December recorded the peak monthly passenger movements at 4.7 million passengers.
- Nevertheless, international passenger movements for the year recorded 49.6 million passengers, reaching a new high of 93.1% recovery rate over 2019 levels, with 349 additional weekly frequencies and 12 new airlines. The 30-day visa waiver granted to Chinese and Indian arrivals and 15-day visa waiver for outbound Malaysia to China partly supported international growth.
- The domestic sector continued to underpin traffic recovery, recording 44.2million passengers, reaching 85.0% of 2019 levels. The steady growth was attributed to a surge in domestic leisure travel, propelled by high demand during the festive seasons supported by additional flights and flight ticket subsidies for tertiary level students.
- Istanbul SGIA, on the other hand, closed the year with the highest total passenger movements recorded to-date exceeding the 40 million marks for the first time at 41.9 million passengers, with a double-digit increase of 11.7% over 2023, and 16.7% over 2019, respectively.
- International passenger movements increased by 13.3% compared to 2023, reaching 22.2 million passengers. Equally, the domestic passenger movements recorded strong growth, recording 19.8 million passengers, an increase of 10.1% over 2023.
- Istanbul SGIA passenger movements growth was partly driven by a strong demand in leisure travel sustained by the airline's route expansion to new destinations, contributing to the airport's remarkable traffic growth.

Passenger Movements ('000) snapshot, December 2024

Total	2024	2023	% YOY	2024	2023	%YOY
	Dec			Year- to-date		
KLIA	5,236	4,647	12.7%	57,104	47,242	20.9%
International	3,924	3,400	15.4%	41,925	32,579	28.7%
ASEAN	1,810	1,614	12.1%	19,738	16,128	22.4%
Non-ASEAN	2,114	1,786	18.3%	22,187	16,451	34.9%
Domestic	1,312	1,247	5.2%	15,179	14,664	3.5%
MASB Airports	3,301	3,127	5.6%	36,697	34,713	5.7%
International	772	637	21.1%	7,694	6,055	27.1%
ASEAN	509	482	5.7%	5,231	4,665	12.1%
Non-ASEAN	262	155	69.0%	2,463	1,390	77.2%
Domestic	2,530	2,490	1.6%	29,003	28,658	1.2%
Total MAHB	8,537	7,774	9.8%	93,801	81,955	14.5%
Istanbul SGIA²	3,610	3,145	14.8%	41,966	37,560	11.7%
Total MAHB System	12,147	10,919	11.2%	135,767	119,516	13.6%

International	2024	2023	% YOY	2024	2023	%YOY
	Dec			Year- to-date		
KLIA	3,924	3,400	15.4%	41,925	32,579	28.7%
ASEAN	1,810	1,614	12.1%	19,738	16,128	22.4%
Non-ASEAN	2,114	1,786	18.3%	22,187	16,451	34.9%
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ASEAN	509	482	5.7%	5,231	4,665	12.1%
Non-ASEAN	262	155	69.0%	2,463.1	1,390	77.2%
Total KLIA & MASB	4,696	4,038	16.3%	49,619	38,633	28.4%
ASEAN	2,319	2,096	10.7%	24,969	20,793	20.1%
Non-ASEAN	2,377	1,942	22.4%	24,650	17,841	38.2%
Istanbul SGIA	2,020	1,709	18.2%	22,174	19,577	13.3%
Total MAHB System	6,716	5,746	16.9%	71,793	58,211	23.3%

Domestic	2024	2023	% YOY	2024	2023	%YOY
	Dec			Year- to-date		
KLIA	1,312	1,247	5.2%	15,179	14,664	3.5%
MASB Airports	2,530	2,490	1.6%	29,003	28,658	1.2%
Total	3,841	3,737	2.8%	44,182	43,322	2.0%
Istanbul SGIA	1,590	1,436	10.7%	19,792	17,983	10.1%
Total MAHB System	5,431	5,172	5.0%	63,974	61,305	4.4%

¹Dec is preliminary, where main variations if any lie largely from the non-scheduled or charter flights at domestic airports

²MASB Airports refers to the 38 Malaysian airports other than KLIA/KUL operated by Malaysia Airports Sdn Bhd.

³LTM refers to the last twelve months, up to and including the month in question

⁴Istanbul 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, December 2024

Airport	2024	2023	% YOY	2024	2023	%YOY
	Dec			Year- to-date	Year- to-date	
KLIA Terminal 1 Total	2,738	2,508	9.2%	30,690	23,683	29.6%
<i>International</i>	2,275	1,991	14.3%	24,305	18,541	31.1%
<i>ASEAN</i>	827	734	12.6%	8,836	6,664	32.6%
<i>Non-ASEAN</i>	1,448	1,256	15.3%	15,470	11,877	30.2%
<i>Domestic</i>	462	517	-10.5%	6,385	5,142	24.2%
KLIA Terminal 2 Total	2,498	2,140	16.7%	26,414	23,559	12.1%
<i>International</i>	1,649	1,410	17.0%	17,620	14,037	25.5%
<i>ASEAN</i>	983	880	11.7%	10,902	9,464	15.2%
<i>Non-ASEAN</i>	666	530	25.6%	6,717	4,574	46.9%
<i>Domestic</i>	849	730	16.3%	8,794	9,522	-7.6%

Aircraft movements snapshot, December 2024

Total	2024	2023	% YOY	2024	2023	%YOY
	Dec			Year- to-date	Year- to-date	
KLIA	33,279	29,536	12.7%	364,881	319,054	14.4%
MASB Airports	32,288	31,420	2.8%	362,816	366,994	-1.1%
Total	65,567	60,956	7.6%	727,697	686,048	6.1%
Istanbul SGIA	21,020	17,950	17.1%	241,921	222,250	8.9%
Total MAHB System	86,587	78,906	9.7%	969,618	908,298	6.8%

International	2024	2023	% YOY	2024	2023	%YOY
	Dec			Year- to-date	Year- to-date	
KLIA	23,822	20,882	14.1%	260,285	214,853	21.1%
MASB Airports	6,460	5,375	20.2%	66,586	57,680	15.4%
Total	30,282	26,257	15.3%	326,871	272,533	19.9%
Istanbul SGIA	11,999	9,100	31.9%	131,423	118,011	11.4%
Total MAHB System	42,281	35,357	19.6%	458,294	390,544	17.3%

Domestic	2024	2023	% YOY	2024	2023	%YOY
	Dec			Year- to-date	Year- to-date	
KLIA	9,457	8,654	9.3%	104,596	104,201	0.4%
MASB Airports	25,828	26,045	-0.8%	296,230	309,314	-4.2%
Total	35,285	34,699	1.7%	400,826	413,515	-3.1%
Istanbul SGIA	9,021	8,850	1.9%	110,498	104,239	6.0%
Total MAHB System	44,306	43,549	1.7%	511,324	517,754	-1.2%

Overview of traffic

2024 was a significant milestone for MAHB network of airports, with the total passenger movements driven partly by international growth, recording 135 million passengers and reaching 96.1% recovery rate against pre-pandemic levels. The impressive performance was partly attributed to strong air travel demand, expansion of airlines networks, particularly in the

international sector amid a challenging backdrop. Favourable travel policies, such as the 30-day visa-free entry for Chinese and Indian tourists visiting Malaysia, played a key role in supporting the upward trend.

On the local front, passenger movements at Malaysia Airports continued to display a robust growth trajectory in 2024, handling 93.8 million passengers, reaching 89.1% of 2019 levels. The strong traffic performance reflects the industry's resilience amid capacity constraints encountered by airlines as a result of supply chain disruptions on aircraft and engine parts. These challenges cause delay in new aircraft deliveries and backlogs in aircraft's Maintenance, Repair and Overhaul (MRO). Despite these challenges, the international traffic continues to thrive, recording 49.6 million passengers, trailing to 2019 levels at 93.1%. The domestic sector also continued to show notable growth, recording 44.2 million passengers, or 85.0% of pre-pandemic levels.

Air connectivity at Malaysia Airports saw 6.1% growth in 2024 with twelve (12) new airlines and sixteen (16) airlines resuming services, connecting to twenty-four (24) new destinations. Key markets with notable growth included China, Indonesia, and the Middle East. A total of 73 foreign carriers and 6 local carriers (excluding full freighters) operated to 138 international and 31 domestic destinations compared to 64 foreign carriers and 8 local carriers in 2023 that served 105 international and 34 domestic destinations. The average load factor for 2024 reached 80.0%, a 2.8 percentage point increase compared to 2023, highlighting strong demand for air travel.

The airline seat capacity for 2024 indicates an 11.4% increase compared to 2023, with the highest growth observed for Northeast Asia, followed by South Asia and the Middle East, indicating significant demand for air travel in these regions supported by the visa waiver, increasing trends in leisure as well as business travellers.

Istanbul SGIA performance in 2024 was exceptional, achieving a significant milestone surpassing the 40 million marks for the first time in history, recording 41.9 million passengers and representing a double-digit growth of 11.7% over 2023 and 16.7% over 2019, respectively. International passenger movements continued to drive growth recording 22.2 million passengers. Domestic passenger movements also demonstrated double-digit growth as international passengers, reaching 19.8 million passengers, representing a 10.1% increase over 2023 levels. In 2024, there were twenty-six (26) new international destinations to sixteen (16) countries operated by Pegasus, Ajet, Batik Air Malaysia, and Air Cairo with 91 new weekly frequencies. A total of thirty-three (33) domestic and ninety-eight (98) international destinations to forty-eight (48)

countries were recorded in 2024 compared to thirty-two (32) domestic and forty-two (42) international destinations to twenty-four (24) countries in 2023.

Conclusion

The Airport Council International (ACI) Advisory Bulletins (September 2024) forecasted that the Global and Asia Pacific passenger movements would increase by 10.0% and 13.0% over 2023, respectively, while the Global traffic in 2025 is forecasted at 6.3% over 2024 and averaging at 5.7% for 2026 to 2027.

The International Air Transport Association (IATA) Global Outlook for Air Transport (December 2024 report) reported that traffic for 2024 for Global and Asia Pacific would grow by 10.7% and 15.6% over 2023, respectively, and 2025 is estimated to grow at 6.2% and 9.1% over 2024, respectively.

The Malaysian Aviation Commission's (MAVCOM) Waypoint Report (October 2024) reported that 2024 air passenger traffic forecast (including Senai Airport) to fall between 95.4 million to 97.6 million passengers representing a year-on-year increase of between 12.2% to 14.9% against a lower-than-expected growth in seat capacity.

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