

Traffic snapshot

- MAHB's network of airports traffic continued to show resilience with the 1Q23 passenger movements trailing closer to pre-pandemic levels, reaching 80.0% of 1Q19 levels, registering at 26.8million passenger movements, a growth of 4% over 4Q22.
- International passenger movements for 1Q23 recorded a growth of 8.1% over 4Q22 with 12.6million passengers, reaching 78.4% of 1Q19 levels. It is also encouraging to note that March 2023 passenger movements of 4.4million passengers is the highest passenger movements recorded to-date since March 2020.
- Domestic passenger movements on the other hand continued to record a steady growth, reaching 81.2% of 1Q19 levels with 14.2million passenger movements.
- For Malaysia, the total passenger movements for 1Q23 grew by 7.3% over 4Q22 with international and domestic recording 8.4million and 10.3million passengers and growths of 15.5% and 1.4% respectively over 4Q22. The first quarter international growth was contributed partly by the airline's resumption of operations by Air Arabia, China Eastern, Shenzhen Airlines and Ethiopian Airlines to nine (9) international destinations with a total additional of 978 weekly frequencies over 4Q22.
- Malaysia's international passenger movements for the month of March 2023 recorded 2.9million passengers and was the highest volume recorded for a month since March 2020, reaching 66.2% of 2019 levels.
- Domestic passenger movements for March 2023 continue to record above the 3million mark, recording 3.7million passengers and reaching the highest average load factor for the year at 81.1%, partly driven by the school holidays. The highest average load factor since 2019 was in December 2022 recording at 81.6%.
- Despite the devastating earthquake in southeast Türkiye in February, Istanbul SGIA's traffic continued to exhibit positive momentum, reaching 99.2% of 2019 levels, and recording 2.7million passenger movements for March 2023. International and domestic passenger movements recorded 1.5million and 1.2million passengers respectively.

Passenger movements ('000) snapshot, March 2023

Total	2023			2022			2023			2022		
	March	% YOY	Year-to-date	%YOY	1LTM	%YOY	1LTM	%YOY				
KLIA	3,763	1,231	205.6%	10,583	3,252	225.4%	32,730	6,668	390.9%			
<i>International</i>	2,511	406	518.7%	7,108	942	654.9%	20,441	2,004	920.1%			
<i>ASEAN</i>	1,270	155	719.0%	3,552	369	861.4%	10,686	787	1258.3%			
<i>Non-ASEAN</i>	1,241	251	394.9%	3,556	572	521.5%	9,755	1,217	701.5%			
<i>Domestic</i>	1,252	825	51.6%	3,475	2,311	50.4%	12,290	4,664	163.5%			
MASB Airports	2,895	1,806	60.3%	8,141	5,083	60.2%	30,369	10,741	182.7%			
<i>International</i>	450	14	3037.8%	1,262	27	4591.3%	3,491	55	6302.7%			
<i>ASEAN</i>	367	14	2517.8%	1,026	26	3844.2%	3,105	52	5850.1%			
<i>Non-ASEAN</i>	82	0.3	27525.5%	236	1	26680.0%	387	2	16355.9%			
<i>Domestic</i>	2,446	1,792	36.5%	6,879	5,056	36.0%	26,878	10,687	151.5%			
Total MAHB	6,658	3,038	119.2%	18,724	8,336	124.6%	63,099	17,409	262.5%			
Istanbul SGIA²	2,751	2,286	20.3%	8,074	6,436	25.4%	32,817	27,520	19.2%			
Total MAHB System	9,409	5,324	76.7%	26,798	14,772	81.4%	95,916	44,929	113.5%			

International	2023	2022	% YOY	2023	2022	% YOY	2023	2022	% YOY
	March			Year- to-date			LTM		
KLIA	2,511	406	518.7%	7,108	942	654.9%	20,441	2,004	920.1%
ASEAN	1,270	155	719.0%	3,552	369	861.4%	10,686	787	1258.3%
Non-ASEAN	1,241	251	394.9%	3,556	572	521.5%	9,755	1,217	701.5%
MASB Airports	450	14	3037.8%	1,262	27	4591.3%	3,491	55	6302.7%
ASEAN	367	14	2517.8%	1,026	26	3844.2%	3,105	52	5850.1%
Non-ASEAN	82	0.3	27525.5%	236	1	26680.0%	387	2	16355.9%
Total KLIA & MASB	2,961	420	604.7%	8,370	969	764.2%	23,932	2,058	1062.7%
ASEAN	1,637	169	868.3%	4,578	395	1057.7%	13,790	839	1543.9%
Non-ASEAN	1,323	251	427.1%	3,792	573	561.7%	10,141	1,219	731.7%
Istanbul SGIA	1,497	1,138	31.6%	4,253	3,164	34.4%	16,800	10,927	53.7%
Total MAHB System	4,458	1,558	186.2%	12,622	4,132	205.5%	40,732	12,985	213.7%

Domestic	2023	2022	% YOY	2023	2022	% YOY	2023	2022	% YOY
	March			Year- to-date			LTM		
KLIA	1,252	825	51.6%	3,475	2,311	50.4%	12,290	4,664	163.5%
MASB Airports	2,446	1,792	36.5%	6,879	5,056	36.0%	26,878	10,687	151.5%
Total	3,697	2,617	41.3%	10,354	7,367	40.5%	39,167	15,350	155.2%
Istanbul SGIA	1,254	1,148	9.2%	3,821	3,272	16.8%	16,017	16,594	-3.5%
Total MAHB System	4,951	3,766	31.5%	14,175	10,640	33.2%	55,184	31,944	72.8%

*March 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 , March 2023

Airport	2023	2022	% YOY	2023	2022	%YOY	2023	2022	%YOY
	March			Year- to-date			LTM		
KLIA Main Total	1,846	656	181.4%	5,328	1,626	227.8%	17,035	3,450	393.8%
International	1,456	351	314.1%	4,191	817	412.7%	12,457	1,740	616.1%
ASEAN	514	104	396.7%	1,447	251	475.7%	4,462	538	730.0%
Non-ASEAN	941	248	279.6%	2,744	566	384.7%	7,995	1,202	565.1%
Domestic	391	305	28.3%	1,137	808	40.7%	4,578	1,710	167.7%
klia2 Total	1,917	575	233.2%	5,255	1,627	223.0%	15,695	3,218	387.8%
International	1,056	54	1842.6%	2,917	124	2249.3%	7,983	264	2922.8%
ASEAN	756	51	1367.7%	2,105	118	1681.8%	6,224	249	2398.4%
Non-ASEAN	300	3	10398.9%	812	6	13401.9%	1,759	15	11638.6%
Domestic	861	521	65.3%	2,338	1,503	55.6%	7,712	2,954	161.1%

Aircraft movements snapshot, March 2023

Total	2023	2022	% YOY	2023	2022	%YOY	2023	2022	2023
	March			Year- to-date			LTM		%YOY
KLIA	25,304	13,115	92.9%	71,535	36,239	97.4%	233,598	95,950	143.5%
MASB Airports	30,638	28,274	8.4%	88,904	79,483	11.9%	360,503	209,476	72.1%
Total	55,942	41,389	35.2%	160,439	115,722	38.6%	594,101	305,426	94.5%
Istanbul SGIA	17,144	14,438	18.7%	48,933	43,252	13.1%	201,069	189,077	6.3%
Total MAHB System	73,086	55,827	30.9%	209,372	158,974	31.7%	795,170	494,503	60.8%

International	2023	2022	% YOY	2023	2022	%YOY	2023	2022	2023
	March			Year- to-date			LTM		%YOY
KLIA	16,509	5,658	191.8%	46,477	15,153	206.7%	142,152	50,476	181.6%
MASB Airports	4,353	1,506	189.0%	12,614	3,896	223.8%	40,974	13,862	195.6%
Total	20,862	7,164	191.2%	59,091	19,049	210.2%	183,126	64,338	184.6%
Istanbul SGIA	9,167	7,372	24.3%	26,064	22,151	17.7%	104,552	79,505	31.5%
Total MAHB System	30,029	14,536	106.6%	85,155	41,200	106.7%	287,678	143,843	100.0%

Domestic	2023	2022	% YOY	2023	2022	%YOY	2023	2022	2023
	March			Year- to-date			LTM		%YOY
KLIA	8,795	7,457	17.9%	25,058	21,086	18.8%	91,446	45,474	101.1%
MASB Airports	26,285	26,768	-1.8%	76,290	75,587	0.9%	319,529	195,614	63.3%
Total	35,080	34,225	2.5%	101,348	96,673	4.8%	410,975	241,088	70.5%
Istanbul SGIA	7,977	7,066	12.9%	22,869	21,101	8.4%	96,517	109,572	-11.9%
Total MAHB System	43,057	41,291	4.3%	124,217	117,774	5.5%	507,492	350,660	44.7%

Overview of traffic

MAHB network of airports for 1Q23 recorded 26.8million passenger movements, slightly higher than 4Q22 of 25.8million passengers, an indication that traffic recovery continues to gain traction. Passenger movements for January to March 2023 sustained above the 9million mark each month, a volume that was first recorded in December 2022 since the pandemic outbreak in March 2020. It is also encouraging to note that the international passenger movements continued to register new highs partly driven by the easing of travel restrictions and with airlines responding by resuming more pre-pandemic flights. International passenger movements in March 2023 recorded the highest volume to-date with an 80.2% recovery rate over 2019 levels.

Malaysia's total passenger movements in March 2023 was the highest volume to-date with 6.7million passengers, sustaining above the 6million mark that was first recorded in December 2022. International passenger movements were remarkable as well and continued to pick up momentum recording the highest volume at 2.9million passengers, as more COVID-19 related travel restrictions eased and airlines ramping up operations. The high international passenger movements were mainly from Singapore, Indonesia, Thailand, India, China and Japan. The reopening of China's borders had supported the demand in this sector. AirAsia, AirAsia X, Malaysia Airlines, Shenzhen Airlines, China Eastern, and China Southern resumed operations to China from Kuala Lumpur International Airport (KUL), Penang (PEN) and Kota Kinabalu (BKI) with 42 additional frequencies in March compared with the February 2023. The other destinations that resumed in 1Q23 are Balikpapan, Addis Ababa and Sharjah. The growth in passenger movements were further enhanced with the additional operations by MYAirlines to Sibul, Tawau, and Miri from KUL and new services by Firefly to Kuala Namu and Singapore from PEN.

Passenger movements for Istanbul SGIA continued to show resilience in the 1Q23 recording more than 2.4million passengers each month. It is also noteworthy that the 1Q23 international passengers

for Istanbul SGIA has exceeded 1Q19 by 42%. In addition, the March 2023 international passenger movements were higher than January 2023 recording 1.5million passengers, an increase of 38.5% over March 2019.

*Research and Planning, MAHB
19 April 2023*