

Traffic snapshot

- July 2020 passenger movements for the MAHB network of airports surpassed the 2million mark for the first time since the imposition of the Movement Control Order in March. The network of airports registered 2.5million passenger movements for July.
- Domestic sector continued to lead the recovery in passenger movements, with an encouraging 2.2million passengers. Average daily passengers jumped by more than 2-fold over June daily passenger movements, an indication of growing demand. There was considerable upward pattern in movements a week before and towards Eid Al-Adha that fell on 31 July 2020, a seasonal traffic that is distinctive in Malaysia but uncommon for Istanbul domestic market.
- International passenger movements showed some slight improvements compared to the previous months but still weak as most of the countries' borders are still controlled.
- Malaysia passenger movements registered over 1million passengers, an encouraging volume considering the uplift of interstate travel of just a month ago. Domestic registered 1.2million passengers with -73.2% over July 2019.
- Istanbul SGIA passenger movements surpassed the 1million mark after the ease of travel restrictions in June, registering 1.2million passengers for July 2020 over July 2019. Domestic registered close to 1million passengers while international passenger movements registered almost 300,000 passenger movements. Four foreign airlines resumed operations to Istanbul SGIA from Morocco, Doha, Russia and Kuwait in July 2020.

Passenger Traffic ('000) Snapshot, July 2020

Total	2020	2019	% YOY	2020	2019	%YOY	2020	2019	%YOY
	July			Year- to-date			'LTM		
KLIA	446	5,460	-91.8%	11,438	35,834	-68.1%	37,940	60,821	-37.6%
International	88	3,927	-97.7%	7,828	25,805	-69.7%	26,957	43,909	-38.6%
ASEAN	28	1,876	-98.5%	3,672	12,416	-70.4%	12,770	20,989	-39.2%
Non-ASEAN	61	2,052	-97.0%	4,156	13,389	-69.0%	14,187	22,920	-38.1%
Domestic	358	1,532	-76.6%	3,610	10,030	-64.0%	10,983	16,912	-35.1%
MASB Airports	860	3,747	-77.1%	9,088	24,523	-62.9%	27,491	41,246	-33.3%
International	2	745	-99.7%	1,251	4,855	-74.2%	4,748	8,313	-42.9%
ASEAN	2	435	-99.5%	818	2,851	-71.3%	2,946	4,941	-40.4%
Non-ASEAN	0.3	310	-99.9%	433	2,005	-78.4%	1,802	3,372	-46.6%
Domestic	857	3,002	-71.4%	7,837	19,668	-60.2%	22,743	32,933	-30.9%
Total MAHB	1,306	9,207	-85.8%	20,526	60,357	-66.0%	65,431	102,067	-35.9%
Istanbul SGIA²	1,226	3,396	-63.9%	8,876	20,356	-56.4%	24,474	34,891	-29.9%
Total MAHB System	2,532	12,603	-79.9%	29,402	80,713	-63.6%	89,905	136,958	-34.4%

International	2020	2019	% YOY	2020	2019	%YOY	2020	2019	%YOY
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Total KLIA & MASB	91	4,673	-98.1%	9,080	30,660	-70.4%	31,706	52,222	-39.3%
ASEAN	30	2,311	-98.7%	4,490	15,267	-70.6%	15,716	25,930	-39.4%
Non-ASEAN	61	2,361	-97.4%	4,589	15,393	-70.2%	15,989	26,292	-39.2%
Istanbul SGIA	258	1,386	-81.4%	3,083	7,802	-60.5%	9,516	13,052	-27.1%
Total MAHB System	348	6,058	-94.3%	12,162	38,461	-68.4%	41,221	65,274	-36.8%

Domestic	2020	2019	% YOY	2020	2019	%YOY	2020	2019	%YOY
	July			Year- to-date			LTM		
KLIA	358	1,532	-76.6%	3,610	10,030	-64.0%	10,983	16,912	-35.1%
MASB Airports	857	3,002	-71.4%	7,837	19,668	-60.2%	22,743	32,933	-30.9%
Total	1,215	4,534	-73.2%	11,446	29,697	-61.5%	33,726	49,844	-32.3%
Istanbul SGIA	968	2,010	-51.8%	5,793	12,554	-53.9%	14,958	21,840	-31.5%
Total MAHB System	2,183	6,544	-66.6%	17,240	42,252	-59.2%	48,684	71,684	-32.1%

*July 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 Traffic ('000) Snapshot, July 2020

Airport	2020	2019	% YOY	2020	2019	%YOY	2020	2019	%YOY
	July			Year- to-date			LTM		
KLIA Main Total	124	2,561	-95.1%	5,424	16,476	-67.1%	18,155	28,296	-35.8%
<i>International</i>	75	2,057	-96.4%	4,209	13,258	-68.3%	14,362	22,959	-37.4%
ASEAN	16	797	-97.9%	1,505	5,143	-70.7%	5,455	8,821	-38.2%
Non-ASEAN	58	1,260	-95.4%	2,704	8,115	-66.7%	8,907	14,138	-37.0%
<i>Domestic</i>	50	504	-90.1%	1,215	3,217	-62.2%	3,793	5,337	-28.9%
klia2 Total	322	2,899	-88.9%	6,014	19,359	-68.9%	19,785	32,525	-39.2%
<i>International</i>	14	1,870	-99.3%	3,620	12,547	-71.1%	12,595	20,950	-39.9%
ASEAN	11	1,079	-98.9%	2,167	7,273	-70.2%	7,315	12,168	-39.9%
Non-ASEAN	2	792	-99.7%	1,452	5,273	-72.5%	5,280	8,782	-39.9%
<i>Domestic</i>	308	1,028	-70.0%	2,395	6,812	-64.8%	7,190	11,575	-37.9%

Aircraft Traffic Snapshot, July 2020

Total	2020	2019	% YOY	2020	2019	%YOY	2020	2019	%YOY
	July			Year- to-date			LTM		
KLIA	5,814	34,723	-83.3%	96,350	234,149	-58.9%	269,516	402,459	-33.0%
MASB Airports	16,835	42,008	-59.9%	146,260	276,579	-47.1%	355,809	475,015	-25.1%
Total	22,649	76,731	-70.5%	242,610	510,728	-52.5%	625,325	877,474	-28.7%
Istanbul SGIA	9,317	21,014	-55.7%	60,729	131,336	-53.8%	159,672	227,460	-29.8%
Total MAHB System	31,966	97,745	-67.3%	303,339	642,064	-52.8%	784,997	1,104,934	-29.0%

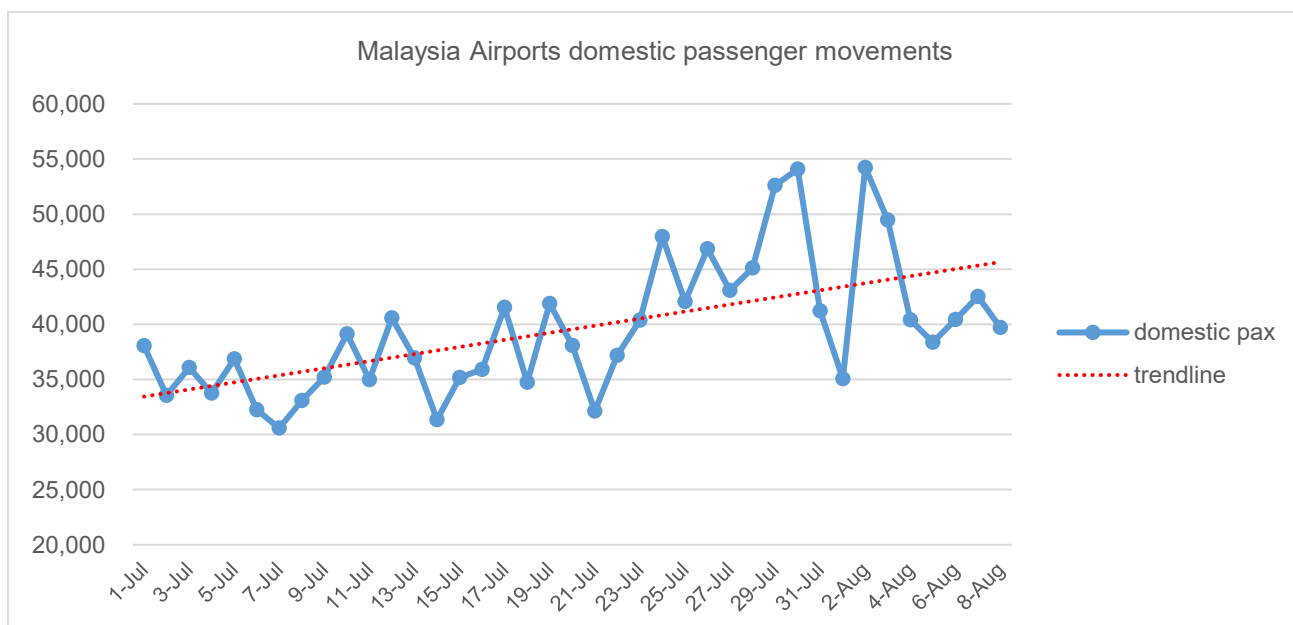
International	2020	2019	% YOY	2020	2019	%YOY	2020	2019	%YOY
	July			Year- to-date			LTM		
KLIA	2,276	23,430	-90.3%	63,406	158,974	-60.1%	180,859	274,155	-34.0%
MASB Airports	870	6,628	-86.9%	18,092	42,523	-57.5%	50,180	74,209	-32.4%
Total	3,146	30,058	-89.5%	81,498	201,497	-59.6%	231,039	348,364	-33.7%
Istanbul SGIA	2,300	9,260	-75.2%	22,159	54,794	-59.6%	65,250	91,532	-28.7%
Total MAHB System	5,446	39,318	-86.1%	103,657	256,291	-59.6%	296,289	439,896	-32.6%

Domestic	2020	2019	% YOY	2020	2019	%YOY	2020	2019	%YOY
	July			Year- to-date			LTM		
KLIA	3,538	11,293	-68.7%	32,944	75,175	-56.2%	88,657	128,304	-30.9%
MASB Airports	15,965	35,380	-54.9%	128,168	234,056	-45.2%	305,629	400,806	-23.7%
Total	19,503	46,673	-58.2%	161,112	309,231	-47.9%	394,286	529,110	-25.5%
Istanbul SGIA	7,017	11,754	-40.3%	38,570	76,542	-49.6%	94,422	135,928	-30.5%
Total MAHB System	26,520	58,427	-54.6%	199,682	385,773	-48.2%	488,708	665,038	-26.5%

Traffic performance for Malaysia Airports Holdings Berhad's (MAHB) network of airports

MAHB's network of airports recorded 2.5million passenger movements in July 2020, a contraction of 79.9% over July 2019. Domestic and international sector declined by 66.6% and 94.3% respectively compared to the same period in 2019, recording 2.2million and almost 350,000 passengers. On a last-twelve-month basis, the total MAHB network of airports registered a decline of 36.8% with 41.2million passengers. Overall aircraft movements declined by 67.3% with domestic and international movements declined by 54.6% and 86.1% over July 2019.

Airports in Malaysia registered 1.3million passengers in July 2020, a decline of 85.8% over July 2019. Domestic and international sector recorded 73.2% and 98.1% with 1.2million and over 90,000 passengers respectively. There was an upsurge of passenger movements a week before Eid Al-Adha which continued to the first week of August. Average daily passenger movements during that period was over 46,000 passengers compared to the average daily movements from 1 to 23 July of 36,000 passengers. Overall aircraft movements declined by 70.5% over July 2019 with an average load factor of 55.5%. The highest average load factor recorded was 61.5%, a day before Eid Al-Adha. Domestic and international aircraft movements declined by 58.2% and 89.5% respectively.

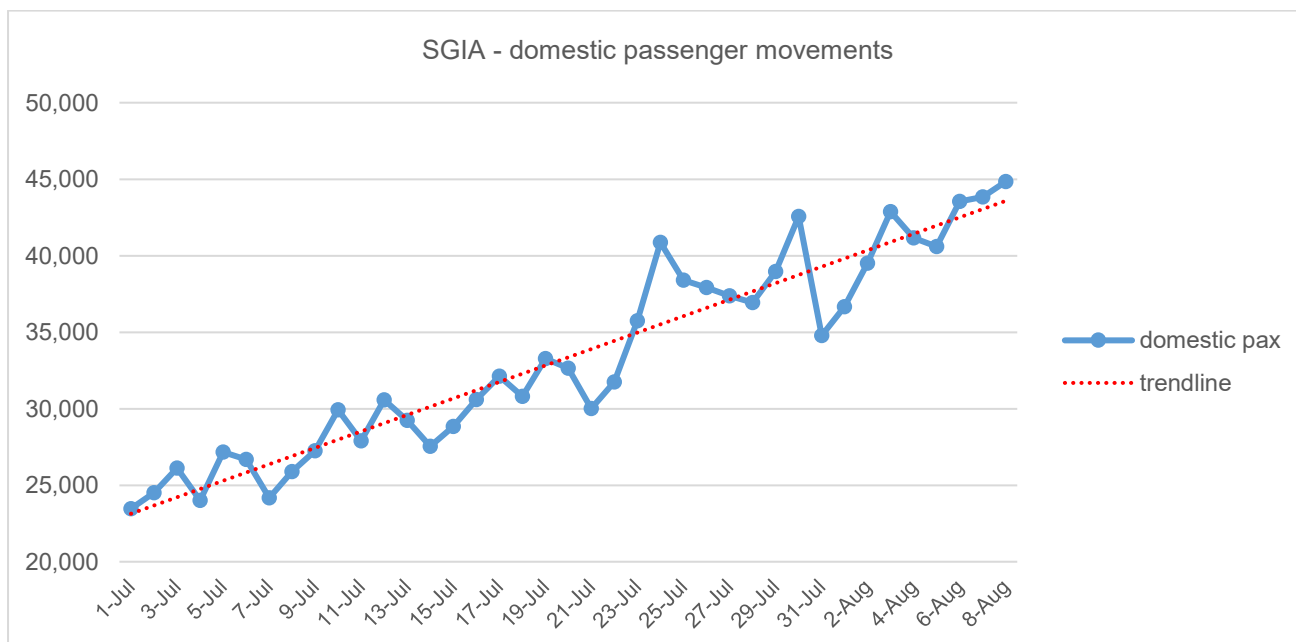


KLIA passenger movements registered 91.8% decline over July 2019 with over 440,000 passenger movements. Domestic and international passenger movements declined by 76.6% and 71.4% over July 2019. The last-twelve-month passenger movements for KLIA Main Terminal recorded 18.2million passengers, a decline of 35.8%. klia2 passenger movements declined by 39.2% with close to 20.0million passengers. Overall aircraft movements at KLIA declined by 83.3% over the

same month last year. Domestic and international aircraft movements at declined by 68.7% and 90.3% aircraft movements respectively over July 2019.

Passenger movements at MASB Airports declined by 77.1% in July 2020 over July 2019. Domestic and international passenger movements declined by 71.4% and 99.7% respectively over July 2020. Aircraft movements in July 2019 declined by 59.9%. Domestic and international aircraft movements declined by 54.9% with 86.9% over July 2019.

Istanbul SGIA passengers contracted by 63.9% in July 2020 over the same period last year to 1.2million passengers. Domestic and international passengers declined by 51.8% and 81.4% with close to 1.0million and over 250,000 passengers respectively. Similar to Malaysia’s traffic trend, there was a sharp increase in daily passenger movements towards Eid Al-Adha with average daily passengers of 38,000 over 28,000 from 1 to 23 July 2020. Total aircraft movements decreased by 55.7%. Domestic and international aircraft movements recorded a decline of 40.3% and 75.2% respectively over July 2019.



Overview of traffic

July passenger movements provides some optimism in air travel amidst COVID-19 outbreak. Passenger volume surpassed the 2million mark in just a month after the easing of control and border movements. The domestic sector continued to steer the recovery with some restrained

growth in the international sector. In Malaysia, the announcement of the Reciprocal Green Lane (RGL) and Periodic Commuting Arrangement (PCA) to facilitate cross-border travel for essential travel, official purposes, business and work purposes between Malaysia and Singapore from mid-August would see some slight increase in international traffic. Local airlines in the latest filing shows flights resumption to Singapore from 17 August and onwards. As for Turkey, the UK Government's announcement of travel corridor exemptions with more than 50 countries including Turkey, saw Pegasus and Anadolujet restart flight operations to Stanstead (daily) and Manchester (3 weekly) in July.

Istanbul SGIA upsurge of passenger movements in July were partly contributed to resumption of foreign airlines' operations, recovery in flight frequencies and recommencements of several routes. Air Arabia (from Casablanca with daily flights and Tangier with 2 weekly), Qatar Airways (from Doha with 3 weekly), Pobeda (from Russia with daily flights) and Jazeera Airways being the fourth foreign airlines to resume flight operations to Turkey, will restart 3 weekly flights from Kuwait. Pobeda would recommence daily operations to Moscow, Russia from 1st August, in correspondence with Turkey's new announcement to allow resumption of Turkey-Russia air services in August.