

## Traffic snapshot

- MAHB's network of airports recorded the highest quarterly passenger volume to-date for 1Q22 at 14.8million passenger movements, signalling a turning point for an optimistic traffic recovery. It is also encouraging to note that 5.3million passenger movements were recorded in March 2022, being 99.1% of December 2021's 5.4million passenger movements, which was the highest passenger volume recorded since the beginning of the pandemic in March 2020.
- The positive development in traffic for 1Q22 was driven by the further easing of travel restrictions and quarantines, the strategic but cautious move to reopen borders through Vaccinated Travel Lanes (VTL) arrangements with several countries and the gradual move to transition towards an endemic phase.
- March 2022 international sector registered the highest passenger movements to-date at both Malaysia and Istanbul SGIA respectively, since the closure of borders in March 2020. Malaysia's international passenger movements in March 2022 grew by 2-fold month-on-month, reaching more than 400,000 passengers. The increase was notable as only a handful of countries began to relax borders restrictions and entry procedures within the Asia Pacific region. Istanbul SGIA meanwhile registered 1.1 million international passenger movements in March 2022, despite the ongoing conflict between Ukraine and Russia.
- Domestic sector in Malaysia continued to build momentum, registering 2.6million passenger movements, reaching 93% of December 2021 peak volume. Istanbul SGIA registered 1.1million domestic passengers in March 2022 as the home-based airlines are shifting from domestic operations to international and are ready to rebuild pre-COVID international network expansion and traffic. Pegasus Airlines has resumed services to Moscow and St. Peterburg from 11<sup>th</sup> April with daily and 3 flights weekly respectively, while Flydubai has reinstated a 5 weekly frequencies flight to Dubai.
- Since the reopening of Malaysia's borders on 1<sup>st</sup> April 2022, MAHB's network of airports in Malaysia recorded a 48% increase in average daily passenger movements for the first 12-day of the month compared to the average daily passengers for March 2022. However, there was a slight decline in the first week of Ramadhan, a typical trend during the fasting month. Generally, traffic will pick up and peak by the final week of Ramadhan, continuing into the first week of Aidilfitri celebrations. The latest updates on airlines seat capacity offering for the domestic sector shows a 33% increase in the last 7 days of Ramadhan compared to the first 12 days in April.

**Passenger movements ('000) snapshot, March 2022**

Total	2022	2021	% YOY	2022	2021	%YOY	2022	2021	%YOY
	March			Year- to-date			LTM		
<b>KLIA</b>	<b>1,231</b>	<b>205</b>	<b>500.0%</b>	<b>3,252</b>	<b>597</b>	<b>445.1%</b>	<b>6,667</b>	<b>3,046</b>	<b>118.9%</b>
<b>International</b>	<b>406</b>	<b>100</b>	<b>306.6%</b>	<b>941</b>	<b>264</b>	<b>257.0%</b>	<b>2,004</b>	<b>877</b>	<b>128.5%</b>
<i>ASEAN</i>	155	39	301.9%	369	88	317.3%	787	273	187.8%
<i>Non-ASEAN</i>	251	61	309.5%	572	175	226.5%	1,217	603	101.7%
<b>Domestic</b>	<b>825</b>	<b>105</b>	<b>683.1%</b>	<b>2,311</b>	<b>333</b>	<b>594.0%</b>	<b>4,664</b>	<b>2,170</b>	<b>115.0%</b>
<b>MASB Airports</b>	<b>1,800</b>	<b>379</b>	<b>374.5%</b>	<b>5,076</b>	<b>1,068</b>	<b>375.1%</b>	<b>10,734</b>	<b>5,966</b>	<b>79.9%</b>
<b>International</b>	<b>14</b>	<b>3</b>	<b>391.6%</b>	<b>27</b>	<b>8</b>	<b>228.3%</b>	<b>54</b>	<b>24</b>	<b>121.4%</b>
<i>ASEAN</i>	14	3	440.0%	26	7	260.9%	52	21	150.3%
<i>Non-ASEAN</i>	0.29	0.31	-6.5%	0.9	1	-4.8%	2	4	-36.3%
<b>Domestic</b>	<b>1,786</b>	<b>376</b>	<b>374.3%</b>	<b>5,049</b>	<b>1,060</b>	<b>376.2%</b>	<b>10,679</b>	<b>5,941</b>	<b>79.7%</b>
<b>Total MAHB</b>	<b>3,031</b>	<b>585</b>	<b>418.5%</b>	<b>8,328</b>	<b>1,665</b>	<b>400.2%</b>	<b>17,401</b>	<b>9,012</b>	<b>93.1%</b>
<b>Istanbul SGIA<sup>2</sup></b>	<b>2,286</b>	<b>1,643</b>	<b>39.1%</b>	<b>6,436</b>	<b>4,272</b>	<b>50.7%</b>	<b>27,520</b>	<b>14,353</b>	<b>91.7%</b>
<b>Total MAHB System</b>	<b>5,317</b>	<b>2,227</b>	<b>138.7%</b>	<b>14,764</b>	<b>5,937</b>	<b>148.7%</b>	<b>44,922</b>	<b>23,365</b>	<b>92.3%</b>

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	March			Year- to-date			LTM		
<b>KLIA</b>	<b>406</b>	<b>100</b>	<b>306.6%</b>	<b>941</b>	<b>264</b>	<b>257.0%</b>	<b>2,004</b>	<b>877</b>	<b>128.5%</b>
<i>ASEAN</i>	155	39	301.9%	369	88	317.3%	787	273	187.8%
<i>Non-ASEAN</i>	251	61	309.5%	572	175	226.5%	1,217	603	101.7%
<b>MASB Airports</b>	<b>14</b>	<b>3</b>	<b>391.6%</b>	<b>27</b>	<b>8</b>	<b>228.3%</b>	<b>54</b>	<b>24</b>	<b>121.4%</b>
<i>ASEAN</i>	14	3	440.0%	26	7	260.9%	52	21	150.3%
<i>Non-ASEAN</i>	0.29	0.31	-6.5%	0.9	1	-4.8%	2	4	-36.3%
<b>Total KLIA &amp; MASB</b>	<b>420</b>	<b>103</b>	<b>308.9%</b>	<b>968</b>	<b>272</b>	<b>256.1%</b>	<b>2,058</b>	<b>901</b>	<b>128.3%</b>
<i>ASEAN</i>	169	41	310.5%	395	96	313.1%	838	294	185.2%
<i>Non-ASEAN</i>	251	62	307.9%	573	176	225.2%	1,219	607	100.8%
<b>Istanbul SGIA</b>	<b>1,138</b>	<b>455</b>	<b>150.1%</b>	<b>3,164</b>	<b>1,209</b>	<b>161.7%</b>	<b>10,927</b>	<b>3,783</b>	<b>188.9%</b>
<b>Total MAHB System</b>	<b>1,558</b>	<b>558</b>	<b>179.4%</b>	<b>4,132</b>	<b>1,481</b>	<b>179.0%</b>	<b>12,985</b>	<b>4,684</b>	<b>177.2%</b>

Domestic	2022	2021		2022	2021		2022	2021	
	March		% YOY	Year- to-date		%YOY	LTM		%YOY
KLIA	825	105	683.1%	2,311	333	594.0%	4,664	2,170	115.0%
MASB Airports	1,786	376	374.3%	5,049	1,060	376.2%	10,679	5,941	79.7%
<b>Total</b>	<b>2,611</b>	<b>482</b>	<b>441.9%</b>	<b>7,360</b>	<b>1,393</b>	<b>428.3%</b>	<b>15,343</b>	<b>8,111</b>	<b>89.2%</b>
<b>Istanbul SGIA</b>	<b>1,148</b>	<b>1,188</b>	<b>-3.3%</b>	<b>3,272</b>	<b>3,063</b>	<b>6.8%</b>	<b>16,594</b>	<b>10,570</b>	<b>57.0%</b>
<b>Total MAHB System</b>	<b>3,760</b>	<b>1,670</b>	<b>125.1%</b>	<b>10,632</b>	<b>4,456</b>	<b>138.6%</b>	<b>31,937</b>	<b>18,681</b>	<b>71.0%</b>

\*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.

<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 movements ('000) snapshot, March 2022

Airport	2022	2021		2022	2021		2022	2021	
	March		% YOY	Year- to-date		%YOY	LTM		%YOY
<b>KLIA Main Total</b>	<b>656</b>	<b>120</b>	<b>446.4%</b>	<b>1,625</b>	<b>329</b>	<b>394.2%</b>	<b>3,450</b>	<b>1,228</b>	<b>180.9%</b>
<i>International</i>	<b>352</b>	<b>82</b>	<b>330.6%</b>	<b>817</b>	<b>223</b>	<b>265.9%</b>	<b>1,740</b>	<b>748</b>	<b>132.5%</b>
ASEAN	104	22	367.6%	251	53	372.0%	537	171	215.2%
Non-ASEAN	248	59	316.8%	566	170	232.7%	1,202	578	108.0%
<i>Domestic</i>	<b>305</b>	<b>38</b>	<b>692.1%</b>	<b>808</b>	<b>106</b>	<b>665.6%</b>	<b>1,710</b>	<b>480</b>	<b>256.6%</b>
<b>klia2 Total</b>	<b>575</b>	<b>85</b>	<b>575.6%</b>	<b>1,627</b>	<b>268</b>	<b>507.6%</b>	<b>3,218</b>	<b>1,818</b>	<b>76.9%</b>
<i>International</i>	<b>54</b>	<b>18</b>	<b>198.7%</b>	<b>124</b>	<b>40</b>	<b>207.6%</b>	<b>264</b>	<b>128</b>	<b>105.6%</b>
ASEAN	51	16	213.2%	118	35	234.8%	249	103	142.4%
Non-ASEAN	3	2	62.8%	6	5	18.7%	15	26	-41.6%
<i>Domestic</i>	<b>521</b>	<b>67</b>	<b>678.0%</b>	<b>1,503</b>	<b>227</b>	<b>560.8%</b>	<b>2,954</b>	<b>1,690</b>	<b>74.8%</b>

### Aircraft movements snapshot, March 2022

Total	2022	2021	% YOY	2022	2021	%YOY	2022	2021	2020
	March			Year- to-date			LTM		%YOY
KLIA	12,985	5,087	155.3%	36,109	13,962	158.6%	95,820	56,061	70.9%
MASB Airports	27,917	11,648	139.7%	79,060	31,685	149.5%	209,056	148,282	41.0%
<b>Total</b>	<b>40,902</b>	<b>16,735</b>	<b>144.4%</b>	<b>115,169</b>	<b>45,647</b>	<b>152.3%</b>	<b>304,876</b>	<b>204,343</b>	<b>49.2%</b>
Istanbul SGIA	14,438	11,736	23.0%	43,252	31,329	38.1%	189,077	107,039	76.6%
<b>Total MAHB System</b>	<b>55,340</b>	<b>28,471</b>	<b>94.4%</b>	<b>158,421</b>	<b>76,976</b>	<b>105.8%</b>	<b>493,953</b>	<b>311,382</b>	<b>58.6%</b>

International	2022	2021	% YOY	2022	2021	%YOY	2022	2021	%YOY
	March			Year- to-date			LTM		
KLIA	5,581	3,556	56.9%	15,076	9,285	62.4%	50,399	30,492	65.3%
MASB Airports	1,430	1,002	42.7%	3,804	2,761	37.8%	13,770	10,523	30.9%
<b>Total</b>	<b>7,011</b>	<b>4,558</b>	<b>53.8%</b>	<b>18,880</b>	<b>12,046</b>	<b>56.7%</b>	<b>64,169</b>	<b>41,015</b>	<b>56.5%</b>
Istanbul SGIA	7,372	3,644	102.3%	22,151	10,588	109.2%	79,505	32,644	143.6%
<b>Total MAHB System</b>	<b>14,383</b>	<b>8,202</b>	<b>75.4%</b>	<b>41,031</b>	<b>22,634</b>	<b>81.3%</b>	<b>143,674</b>	<b>73,659</b>	<b>95.1%</b>

Domestic	2022	2021	% YOY	2022	2021	%YOY	2022	2021	%YOY
	March			Year- to-date			LTM		
KLIA	7,404	1,531	383.6%	21,033	4,677	349.7%	45,421	25,569	77.6%
MASB Airports	26,487	10,646	148.8%	75,256	28,924	160.2%	195,286	137,759	41.8%
<b>Total</b>	<b>33,891</b>	<b>12,177</b>	<b>178.3%</b>	<b>96,289</b>	<b>33,601</b>	<b>186.6%</b>	<b>240,707</b>	<b>163,328</b>	<b>47.4%</b>
Istanbul SGIA	7,066	8,092	-12.7%	21,101	20,741	1.7%	109,572	74,395	47.3%
<b>Total MAHB System</b>	<b>40,957</b>	<b>20,269</b>	<b>102.1%</b>	<b>117,390</b>	<b>54,342</b>	<b>116.0%</b>	<b>350,279</b>	<b>237,723</b>	<b>47.3%</b>

### Overview of traffic

2022 first quarter passenger movements for the total MAHB network of airports reached 14.8million passengers and is the highest passenger movements for a quarter recorded to-date since the COVID-19 outbreak was declared as a global pandemic on 11<sup>th</sup> March 2020. In addition, March 2022 recorded 5.3million passenger movements, surpassing the 5million mark for only a second time since the pandemic began. The positive development is a significant milestone for the network of airports as it signals a clear trajectory towards a realistic and optimistic traffic recovery, albeit at a different pace of recovery between Malaysia and Istanbul SGIA.

Malaysia's international sector is just beginning to pick up as countries in the Asia Pacific region are taking strategic but cautious measures to reopen borders. Malaysia's VTL with Singapore and Thailand, Langkawi travel bubble and the resumption of Umrah services were some of the earlier initiatives to ease international travel restrictions. The reopening of Malaysia borders from 1<sup>st</sup> April 2022 led to a 48% increase or approximately 20,000 average daily passengers for the first twelve (12) days of April compared to March 2022 approximately 13,000 daily average passengers. Domestic passenger movements also continued to build momentum in the first quarter of 2022 (1Q22). Despite a slight slowdown during the first week of Ramadhan, the momentum is anticipated to continue towards the final week of Ramadhan, a typical trend during the fasting month, continuing into the first week of Aidilfitri celebrations. Current airlines seat capacity filings show a 33% increase in the last 7 days of Ramadhan with 178,335 daily average seats compared to the first 12 days in April with 133,932 daily average seats.

Istanbul SGIA passenger movements for 1Q22 registered 6.4million passengers reaching 79% of 1Q19 level, and is the highest quarterly volume registered since April 2020. Traffic in Istanbul SGIA continued to show similar seasonality trends over the pre-COVID period since travel procedures was relaxed for both domestic and international sector on 11<sup>th</sup> June 2021. Istanbul SGIA's head start in traffic recovery was supported by less stringent travel procedures, a reciprocal health certificate acceptance with the European Union and the much earlier reopening of borders among countries in the region.

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