

CANSO ATM TRAFFIC ANALYSIS REPORT

JANUARY 2023

Increases in Asian traffic in January 2023 a welcome sign

- There were 3.47 million flights operated globally in January 2023. This represents a 25 per cent increase on the number of flights in January 2022 and a 4.6 per cent increase on the 3.32 million flights operated in January 2020.
- January 2023 saw 6.79 million flight hours operated globally. This is a 17.5 per cent increase on the number of flight hours in January 2022 and a 3.9 per cent decrease on the 7.07 million flights operated in January 2020.

Has the new normal emerged?

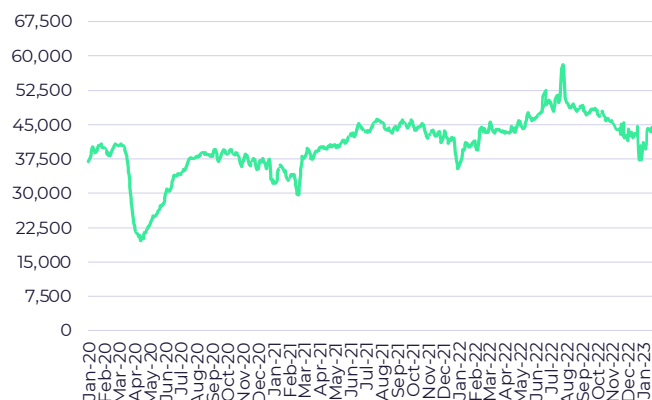
Three years ago, in January 2020, the World Health Organization first declared COVID-19 a Public Health Emergency of International Concern, leading to a pandemic that would all but shut down aviation activity as travel restrictions were imposed in an effort to stop the spread. Months of stop-start later the industry would begin its slow climb into recovery.

While the top level activity numbers show an industry that is today largely recovered from the pandemic's impact, with global flights and flight hours both approximating 2020 levels, today's industry is much changed.

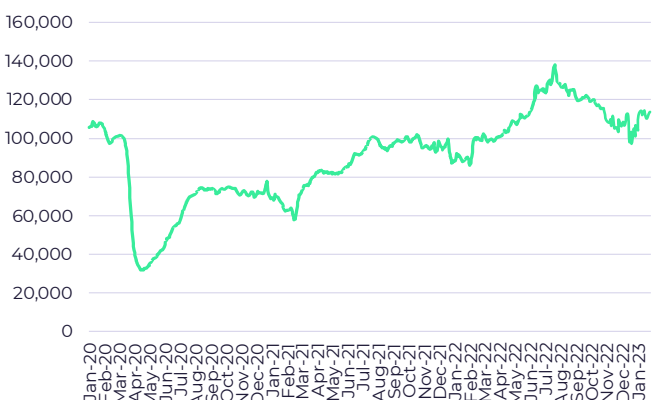
The global fleet operating in today's skies is on the whole newer, smaller and operates a route network with reduced connectivity. There is more focus on leisure markets, as business travel remains significantly off pre-pandemic numbers even if leisure travellers are filling business class seats. Passenger load factors are not yet recovered and there are more business jets than ever before in the skies.

A new normal of sorts has emerged, and the industry has adjusted. 2023 will be another year of adjustment as international routes to and from Asia continue to increase in importance.

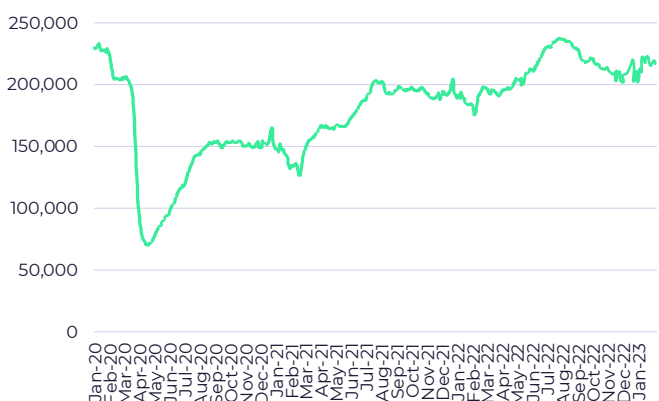
AVERAGE UNIQUE AIRCRAFT



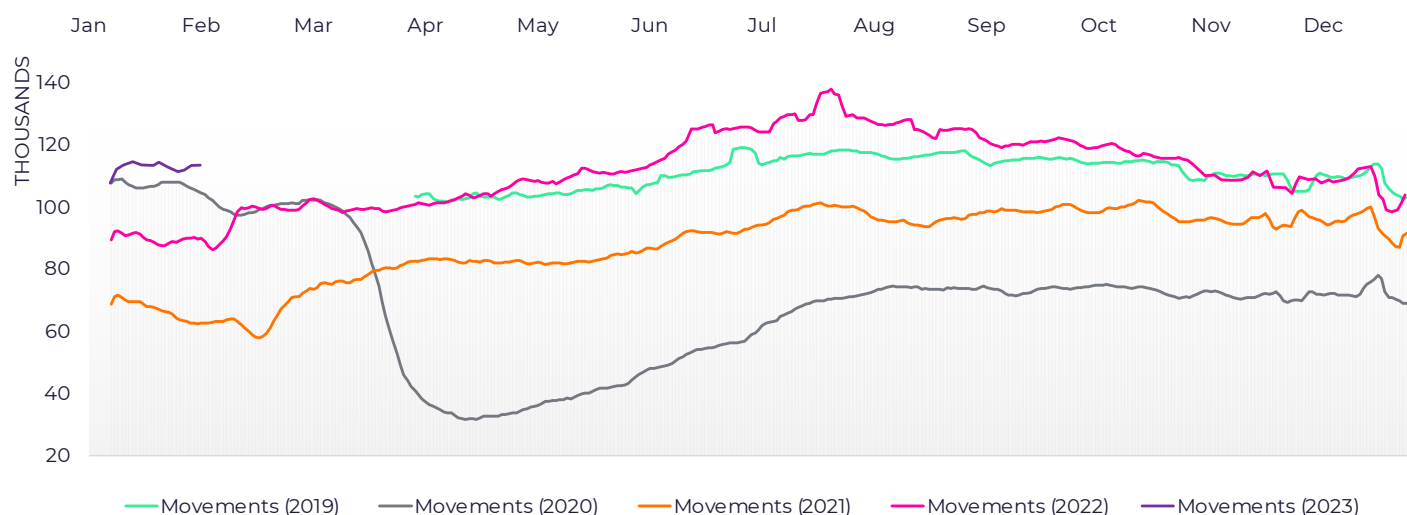
AVERAGE GLOBAL FLIGHTS



AVERAGE GLOBAL FLIGHT HOURS

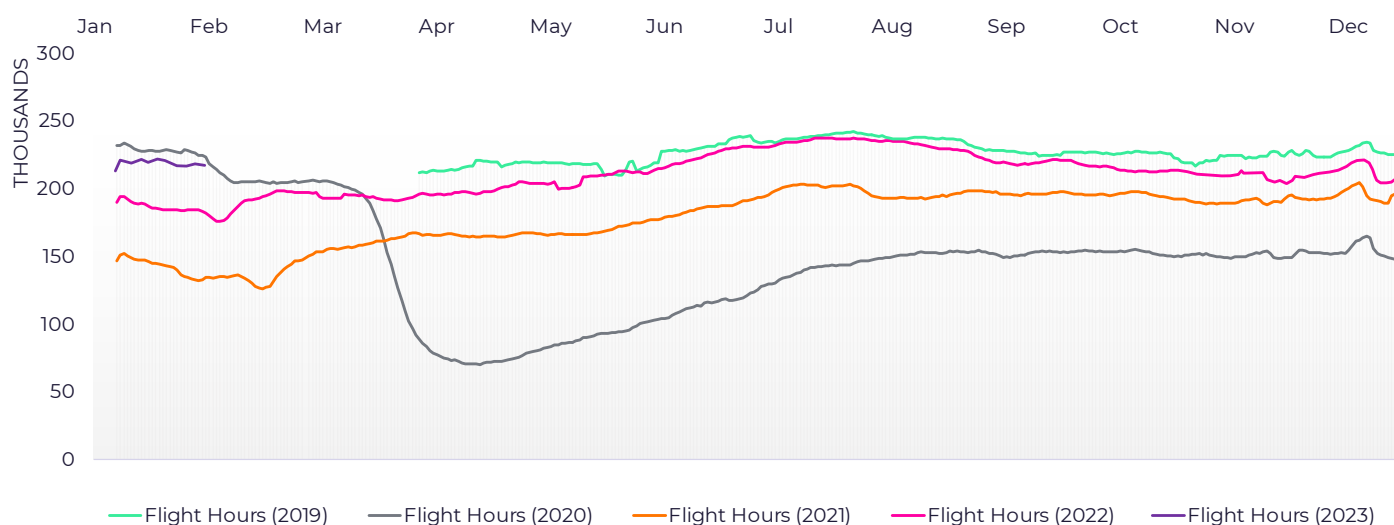


Global daily flights variation



The rolling 7-day average of global daily flight volumes started 2023 slightly ahead of 2020, ranging between 113,000 and 102,000 flights daily.

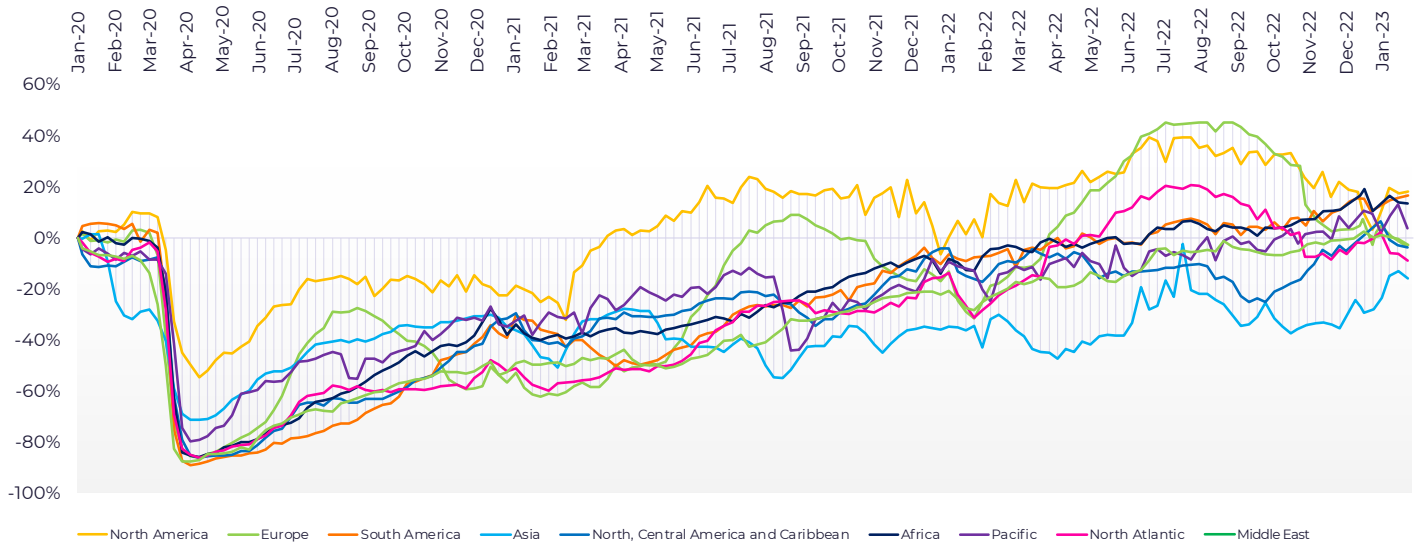
Daily Flight Hours



Global flight hours are an important metric of ATM workload. The post pandemic high remains July 29, 2022 when 244,000 flight hours were operated globally.

Daily flight hours in January 2023 ranged between 186,000 on January 1 and 231,000 on January 13, 2023.

Percent change in flights per region



This month's regional traffic story is all about Asia where significant improvement in January offset the end of holiday travel in other regions. Asia saw an additional 4,800 flights daily over December, the third consecutive month of growth in the region. This growth was reflected in Pacific region figures which also rose higher.

Tracking the recovery: Flights and flight hours by region

	Dates	Average daily flight hours	Percent change	Average daily movements	Percent change
Middle East	1-Jan-2020 22-Jan-2023	7,400 9,800	+32%	6,100 6,000	-2%
North America	1-Jan-2020 22-Jan-2023	67,400 69,200	+3%	38,000 45,200	+19%
Europe	1-Jan-2020 22-Jan-2023	44,700 39,300	-12%	24,900 24,500	-2%
South America	1-Jan-2020 22-Jan-2023	10,700 11,900	+11%	5,800 6,800	+17%
Asia	1-Jan-2020 22-Jan-2023	74,900 67,500	-10%	35,000 29,800	-15%
Caribbean	1-Jan-2020 22-Jan-2023	9,100 8,700	-4%	6,400 6,200	-3%
Africa	1-Jan-2020 22-Jan-2023	4,200 4,500	+7%	1,800 2,100	+17%
North Atlantic	1-Jan-2020 22-Jan-2023	6,800 6,300	-7%	2,300 2,100	-9%

ABOUT THE ATM REPORT

The ATM Report is issued monthly by CANSO as an analysis of metrics directly relevant to the ATM industry. The report uses high fidelity global space-based ADS-B air traffic data provided via a partnership with Aireon. The data include surveillance of all 1090Mhz ADS-B equipped aircraft. While some non-ADS-B equipped aircraft may not be included, the data is appropriate for the monitoring of global trends in traffic levels.



ABOUT CANSO

The Civil Air Navigation Services Organisation is the global voice of air traffic management. CANSO Members and Associate Members support almost 90 percent of world air traffic and represent leading providers of technology and services to the industry. Members share information and develop new policies, with the ultimate aim of improving air navigation services.

For more, visit canso.org.



ABOUT AIREON

Aireon is harnessing next-generation aviation surveillance technologies that were formerly ground-based and, for the first time ever, is extending their reach globally through the use of satellite technology to significantly improve efficiency, enhance safety, reduce emissions and provide cost savings benefits to all stakeholders.

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