

**58th CONFERENCE OF
DIRECTORS GENERAL OF CIVIL AVIATION
ASIA AND PACIFIC REGIONS**

*Dhaka, Bangladesh
15 to 19 October 2023*

**AGENDA ITEM 6: ECONOMIC DEVELOPMENT OF AIR
TRANSPORT**

**MACAO AIR TRAFFIC VOLUME BEFORE, DURING AND AFTER
COVID-19 PANDEMIC**

(Presented by Macao, China)

INFORMATION PAPER

SUMMARY

This Information Paper briefs on the air traffic volume of Macau International Airport before, during and after the COVID pandemic. The Conference is invited to note the recovery trend of Macao aviation market.

MACAO AIR TRAFFIC VOLUME BEFORE, DURING AND AFTER COVID-19 PANDEMIC

1. INTRODUCTION

1.1 Macao recorded the first COVID-19 case on 22 January 2020. Under the strict pandemic prevention measures, passenger volume and aircraft movement at Macau International Airport were severely impacted during 2020 to 2022.

2. INFORMATION

Macao air traffic volume before the pandemic

2.1 Before the outbreak of the COVID-19 pandemic, passenger volume at Macau International Airport had been growing steadily. In 2019, passenger volume hit a record high of 9.6 million, an increase of 16% compared to 2018.

2.2 In 2019, a total of 39 airlines operated scheduled passenger air services to/from Macao. Macao had direct air links to 71 cities.

Macau International Airport – Passenger volume and Aircraft Movement (2011 – 2022)



2.3 Prior to 2020, Macao also experienced consistent growth in aircraft movements. In 2019, aircraft movements registered a record high of 77,581. This represented an impressive increase of 18% when compared to the previous year, 2018.

2.4 Contrastingly, cargo volume had been stagnant since 2008. Only one airline operated all-cargo scheduled air services to Macao, using fifth freedom traffic rights from Macao to destinations beyond, particularly in the Americas. Cargo volume was 42,216 tonnes in 2019, a slight increase of 1.7% compared to 2018.

Macao air traffic volume in 2020-2022

2.5 In 2020, Macau International Airport experienced the most significant decline in traffic since its establishment in 1995. Compared to 2019, the airport recorded a drastic drop in all key metrics, with double-digit percentage declines across the board. Passenger numbers plummeted by 88%, indicating a sharp decrease in air travel demand. The number of aircraft movements also fell by 78%, reflecting reduced flight activity and diminished connectivity. Cargo volume also declined by 21%.

2.6 In 2021, the downturn trend in passenger numbers and aircraft movements at Macau International Airport persisted. The airport handled 1,147,015 passengers, representing a 2% decline compared to 2020. The number of aircraft movements also decreased by 7%, totalling 15,791 for the year.

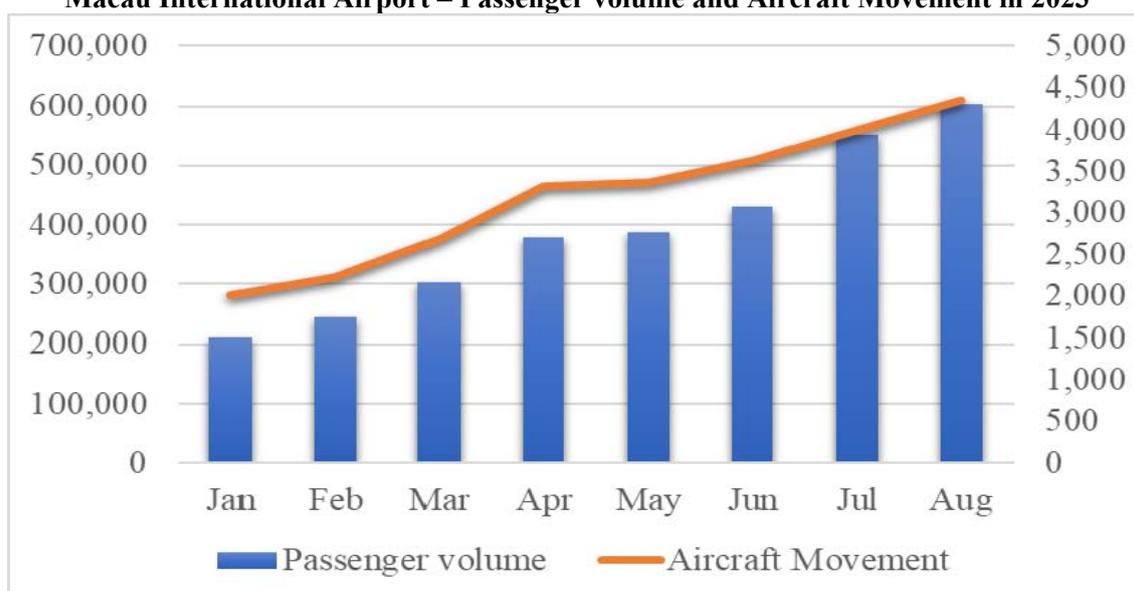
2.7 While the passenger traffic continued to face challenges and decline in 2021, the cargo sector demonstrated resilience and displayed signs of recovery and growth. The Macau International Airport recorded a significant increase in cargo volume, handling 48,595 tonnes in 2021. This marked a notable growth of 46% compared to 2020. Remarkably, the cargo volume even saw a 15% increase when compared to 2019. The contrasting performance between the passenger and cargo sectors can be attributed to various factors, including travel restrictions and reduced consumer confidence. The cargo sector, driven by essential goods and e-commerce demands, managed to navigate the challenging environment more successfully compared to the passenger sector, which heavily relies on leisure and business travel.

2.8 Year 2022 was the most formidable year for the Macau International Airport since its inception in 1995. The airport registered a record low of 598,172 passengers, a substantial decrease of 48% compared to the previous year. Similarly, the number of aircraft movements decreased 14%, totalling 13,642 for the year. This marked the third consecutive year of downward trends in passenger and aircraft movement figures. On a positive side, the cargo sector showed resilience and continued its growth trajectory. The total cargo volume increased for the second consecutive year, reaching 51,401 tonnes in 2022, which was the highest recorded in the past ten years.

Current air traffic volume

2.9 Following the easing of COVID-19 prevention measures starting in December 2022, airlines have been gradually resuming flights to Macao. In August 2023, there has been a notable recovery in passenger volume and aircraft movements, reaching approximately 65% and 62%, respectively, when compared to the same month in 2019. Furthermore, the cumulative passenger volume and aircraft movements up until August have rebounded to around 48% and 50% of the levels recorded in the same period in 2019. Considering that the fourth quarter traditionally represents the peak season for tourism in Macao, it is anticipated that these figures will continue to exhibit a positive trajectory for the remainder of the year.

Macau International Airport – Passenger volume and Aircraft Movement in 2023



2.10 As of September 2023, Macao is served by a total of 28 airlines, offering 45 routes for travellers to/from the region. This signifies a recovery rate of approximately 88% for the number of airlines and 73% for the number of routes in comparison to the equivalent month in 2019.

2.11 Nevertheless, despite the resumption of passenger flights, the cumulative cargo volume until August 2023 experienced a slight decline of -3.3% compared to the same period last year.

2.12 In conclusion, the Covid-19 pandemic had a profound impact on air travel in Macao. The strict pandemic prevention measures implemented resulted in a significant decline in passenger volume and aircraft movements at Macau International Airport. However, with gradual easing of restrictions since December 2022, there has been a gradual recovery, with passenger volume and aircraft movements in August 2023 reaching more than 60% of the figures for the same month in 2019. While the cumulative numbers for 2023 still remain below pre-pandemic levels, there is optimism for further improvement, especially during the traditionally busy fourth quarter for Macao tourism. It is important to note that the cargo volume, however, registered a slight decline until August 2023 compared with the same period in the previous year. Overall, the journey to recovery continues, and the aviation industry in Macao is adapting to the evolving circumstances with a caution eye on public health and safety.

3. ACTION BY THE CONFERENCE

3.1 The Conference is invited to note the information contained in this Paper.

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