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SEATTLE-TACOMA INTERNATIONAL AIRPORT

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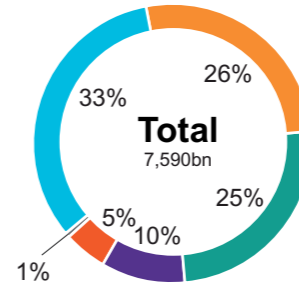


Profits stall

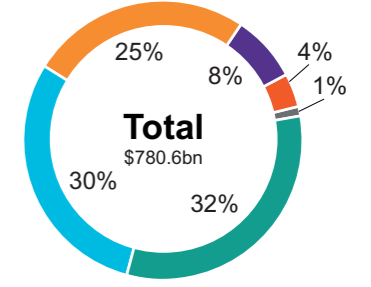


Financial gains failed to keep pace with increased revenues and passenger traffic during 2018 as higher oil costs in particular clipped the industry's recent run of strong results, the annual *Airline Business World Airline Rankings* show. Collective profits among leading carriers slipped last year – even though revenues among the 100 biggest operators grew another 8% to top \$780 billion. Analysis of the data, collected by Cirium, also shows passenger traffic climbed 7%

Airline traffic by region – RPKs



Airline revenues by region



Africa 38,650m	Asia-Pacific 2,522,877m	Europe 2,016,252m	Africa \$7.3bn	Asia-Pacific \$230.9bn	Europe \$199.1bn
Latin America 367,953m	Middle East 753,618m	North America 1,891,386m	Latin America \$31.4bn	Middle East \$60.7bn	North America \$251.3bn

Top 10 airline groups by revenue, 2018

American Airlines Group UNITED STATES	\$44.5bn
Delta Air Lines UNITED STATES	\$44.4bn
Lufthansa Group GERMANY	\$42.2bn
United Continental UNITED STATES	\$41.3bn
FedEx UNITED STATES	\$37.3bn
Air France-KLM Group FRANCE	\$31.2bn
Emirates Group UNITED ARAB EMIRATES	\$29.7bn
IAG UNITED KINGDOM	\$28.7bn
Southwest Airlines UNITED STATES	\$22.0bn
China Southern Air Holdings CHINA	\$21.6bn

Top 10 airline groups by operating profit, 2018

Delta Air Lines UNITED STATES	\$5.26bn
IAG UNITED KINGDOM	\$4.33bn
Lufthansa Group GERMANY	\$3.34bn
United Continental UNITED STATES	\$3.29bn
Southwest Airlines UNITED STATES	\$3.21bn
American Airlines Group UNITED STATES	\$2.66bn
Air China Group CHINA	\$2.16bn
FedEx UNITED STATES	\$2.12bn
Japan Airlines Group JAPAN	\$1.59bn
Air France-KLM Group FRANCE	\$1.57bn

Top 10 airline groups by traffic, 2018 (RPKs)

American Airlines Group UNITED STATES	372,015m
United Continental UNITED STATES	370,319m
Delta Air Lines Group UNITED STATES	362,489m
Emirates Airline UNITED ARAB EMIRATES	299,967m
Lufthansa Group GERMANY	284,561m
IAG UNITED KINGDOM	270,657m
China Southern Air Holdings CHINA	259,194m
Air France-KLM Group FRANCE	255,406m
Air China Group CHINA	220,728m
Southwest Airlines UNITED STATES	214,515m

Top 10 airline groups by passenger numbers, 2018

American Airlines Group UNITED STATES	203.7m
Delta Air Lines Group UNITED STATES	192.5m
Southwest Airlines UNITED STATES	163.6m
United Continental UNITED STATES	158.3m
Lufthansa Group GERMANY	142.3m
Ryanair IRELAND	142.1m
China Southern Air Holdings CHINA	140.0m
China Eastern Airlines Holdings CHINA	122.5m
IAG UNITED KINGDOM	113.0m
Air China Group CHINA	110.0m

8.4%

Rise in revenues in US dollar terms across the 100 biggest airline groups to total over \$780 billion

6.9%

Collective operating margin of biggest carrier groups in 2018, down almost one percentage point on 2017

7.1%

Increase in passenger traffic in RPKs across the 100 biggest groups, at a load factor of 82.2%

3.81bn

Total passengers carried among leading airlines in 2018, an increase of 6.6% on the previous year

LEADING AIRLINE GROUPS BY TRAFFIC

This ranking lists the 100 biggest airline groups by RPKs flown in 2018, together with their key subsidiaries where separate data is available. The use of different sources and because not all units are listed means subsidiary totals do not necessarily match group figures. Data for the top 150 biggest airline groups is available at cirium.com/dashboard

Leading airline groups by RPKs, 2018

Rank	2018	2017	Airline/Group	Country/district	Traffic		Capacity		Load factor %	Passengers			Notes
					RPKs (m)	Change	ASKs (m)	Change		Pax (m)	Change	Year ending	
1	1		American Airlines Group	USA	372,015	2.1%	453,921	2.0%	82.0	203.7	2.1%	Dec	
			American Airlines	USA	330,575	2.0%	399,956	1.9%	82.7	148.2	2.3%	Dec	
			Envoy Air	USA	10,461	11.1%	13,399	9.6%	78.1	13.6	15.8%	Dec	
1	2		United Continental	USA	370,319	6.4%	442,892	4.9%	83.6	158.3	6.9%	Dec	
			United Airlines	USA	329,692	5.9%	393,836	4.4%	83.7	113.3	5.3%	Dec	
3	3		Delta Air Lines Group	USA	362,489	3.5%	423,845	3.6%	85.5	192.5	3.3%	Dec	
			Delta Air Lines	USA	330,364	4.3%	383,888	4.5%	86.1	152.3	4.4%	Dec	Mainline only
			Endeavor Air	USA	11,024	17.8%	13,892	17.6%	79.4	13.8	16.8%	Dec	
4	4		Emirates Airline	UAE	299,967	2.7%	390,582	3.6%	76.8	58.6	0.2%	Mar	
5	5		Lufthansa Group	Germany	284,410	8.9%	349,450	8.3%	81.4	142.3	9.6%	Dec	
			Lufthansa	Germany	160,074	4.5%	196,768	4.8%	81.4	70.1	5.9%	Dec	
			Eurowings	Germany	52,609	23.4%	64,748	21.3%	81.3	38.5	18.0%	Dec	Inc Brussels Airlines
			Swiss	Switzerland	50,048	9.9%	60,595	8.4%	82.6	20.4	8.8%	Dec	
			Austrian	Austria	21,973	9.6%	27,703	6.2%	79.3	13.9	8.4%	Dec	
6	6		IAG	UK	270,657	7.1%	324,808	6.1%	83.3	112.9	7.7%	Dec	
			British Airways	UK	152,177	3.3%	184,547	2.5%	82.5	44.9	4.9%	Dec	
			Iberia	Spain	60,526	10.2%	70,685	8.2%	85.6	21.0	10.5%	Dec	Pax: ICAO
			Vueling Airlines ^(EST)	Spain	31,973	9.8%	37,431	8.8%	85.4	32.5	9.8%	Dec	Pax: AB estimate 2018
			Aer Lingus	Ireland	23,516	9.8%	29,030	10.0%	81.0	11.6	5.5%	Dec	Pax: ICAO
7	7		China Southern Air	China	259,194	12.4%	314,421	12.0%	82.4	139.9	10.8%	Dec	
			China Southern Airlines	China	195,480	11.2%	236,218	11.3%	82.8	100.3	9.7%	Dec	
			Xiamen Airlines	China	58,879	17.2%	72,270	15.0%	81.5	35.9	12.9%	Dec	
8	8		Air France-KLM	France	255,406	2.8%	292,188	2.1%	87.4	85.6	2.0%	Dec	
			Air France	France	147,734	1.9%	171,363	1.3%	86.2	51.4	0.4%	Dec	
			KLM	Netherlands	107,678	4.0%	120,815	3.2%	89.1	34.2	4.5%	Dec	
			Transavia Group	Netherlands	28,392	11.2%	30,850	9.2%	92.0	15.8	7.6%	Dec	
9	9		Air China Group	China	220,728	9.8%	273,855	10.4%	80.6	109.7	8.0%	Dec	
			Air China	China	161,759	9.9%	201,903	11.0%	80.1	71.0	7.4%	Dec	
			Shenzhen Airlines	China	53,855	9.1%	65,564	9.7%	82.1	30.7	8.5%	Dec	
10	10		Southwest Airlines	USA	214,508	3.3%	257,004	3.8%	83.5	163.6	3.8%	Dec	
11	11		China Eastern Airlines	China	201,486	10.0%	244,841	8.3%	83.1	121.1	9.3%	Dec	
			China Eastern Airlines	China	167,574	11.8%	203,687	9.8%	82.3	97.7	11.4%	Dec	
			Shanghai Airlines	China	24,788	9.6%	31,250	9.7%	79.3	17.2	11.7%	Dec	ASK: AB estimate
12	12		Ryanair ^(EST)	Ireland	178,000	9.5%	186,000	9.3%	95.7	142.1	9.1%	Mar	RPK/ASK/LF: AB est
13	13		Qatar Airways	Qatar	154,080	5.5%	231,094	13.5%	67.0	29.5	1.0%	Mar	LF: AB estimate
14	15		Turkish Airlines	Turkey	149,169	8.9%	182,031	5.2%	81.9	75.2	9.6%	Dec	
15	14		Air Canada Group	Canada	148,607	8.5%	178,383	7.1%	83.3	50.9	5.8%	Dec	
16	16		Aeroflot Group	Russia	143,151	9.9%	173,075	10.1%	82.7	55.7	11.1%	Dec	
			Aeroflot	Russia	97,956	6.7%	121,616	8.3%	80.5	35.8	8.9%	Dec	
			Rossiya Airlines	Russia	29,601	5.3%	34,181	2.6%	86.6	11.1	-0.1%	Dec	
			Pobeda	Russia	13,105	65.3%	13,925	65.4%	94.1	7.2	56.8%	Dec	
17	18		Singapore Airlines	Singapore	140,838	8.5%	169,607	6.4%	83.0	36.1	7.1%	Dec	
			Singapore Airlines	Singapore	102,572	7.0%	123,486	4.5%	83.1	20.7	6.2%	Dec	
			Scot	Singapore	29,325	14.6%	34,388	15.1%	85.3	10.5	10.5%	Dec	
			SilkAir	Singapore	8,850	9.2%	11,751	6.2%	75.3	4.9	5.9%	Dec	

Rank	2018	2017	Airline/Group	Country/district	Traffic		Capacity		Load factor %	Passengers			Notes
					RPKs (m)	Change	ASKs (m)	Change		Pax (m)	Change	Year ending	
18	17		Hainan Airlines Group	China	138,731	14.4%	164,055	16.5%	84.6	79.9	11.5%	Dec	
			Hainan Airlines	China	74,402	18.4%	89,735	20.7%	82.9	35.0	14.4%	Dec	
			Tianjin Airlines ^(EST)	China	19,500	7.1%	22,500	6.6%	86.7	14.5	5.1%	Dec	AB estimate
			Lucky Air ^(EST)	China	15,250	8.9%	17,500	8.7%	87.1	11.5	9.5%	Dec	AB estimate
19	19		Cathay Pacific Group	Hong Kong	130,626	3.1%	155,361	3.5%	84.1	35.5	1.9%	Dec	
			Cathay Pacific	Hong Kong	114,697	2.6%	135,078	3.0%	84.9	24.3	0.8%	Dec	
			Cathay Dragon	Hong Kong	15,718	5.5%	20,018	5.4%	78.5	11.1	3.7%	Dec	
20	20		Qantas Group	Australia	126,814	4.7%	152,428	1.4%	83.2	55.3	3.0%	Jun	
			Qantas	Australia	85,057	5.4%	103,665	2.0%	82.0	30.5	2.3%	Jun	
			Jetstar Group	Australia	35,076	3.6%	40,806	0.5%	86.0	20.3	3.6%	Jun	
21	21		LATAM Airlines Group	Chile	119,077	2.9%	143,265	5.0%	83.1	68.8	2.5%	Dec	
			LATAM Airlines Brazil	Brazil	59,903	3.6%	72,988	6.4%	82.1	34.2	1.0%	Dec	
			LATAM Airlines Chile	Chile	24,667	1.2%	29,595	3.7%	83.3	8.4	3.1%	Dec	
22	23		EasyJet	UK	98,522	9.9%	104,800	9.4%	94.0	88.5	10.3%	Sep	
23	24		ANA Holdings	Japan	91,481	2.3%	124,451	1.3%	73.5	54.4	0.9%	Dec	
24	25		Alaska Air Group	USA	87,970	4.5%	105,124	5.3%	83.7	45.8	4.0%	Dec	
			Horizon Air	USA	4,172	10.6%	5,264	11.1%	79.2	7.2	2.8%	Dec	
25	27		Norwegian	Norway	85,124	34.4%	99,219	37.2%	85.8	37.3	12.7%	Dec	
26	22		Etihad Airways	UAE	84,269	-6.7%	110,300	-4.1%	76.4	17.8	-4.3%	Dec	
27	28		JetBlue Airways	USA	81,720	7.5%	96,347	6.9%	84.8	42.1	5.4%	Dec	
28	26		Korean Air	South Korea	80,154	3.0%	99,943	1.8%	80.2	27.0	0.4%	Dec	
29	30		Japan Airlines Group	Japan	70,855	4.7%	91,043	4.0%	77.8	44.0	3.3%	Mar	
			Japan Airlines	Japan	65,912	4.8%	83,856	3.9%	78.6	35.1	2.9%	Mar	
30	31		Saudia ^(EST)	Saudi Arabia	68,500	8.4%	102,000	8.0%	67.2	34.0	8.3%	Dec	RPK/ASK/LF is AB est
31	29		Thai Airways International	Thailand	68,164	0.1%	87,290	2.3%	78.1	19.7	-0.8%	Dec	
32	32		Thomas Cook Group	UK	66,707	6.0%	73,954	5.4%	90.2	20.2	7.4%	Sep	
			Condor	Germany	31,555	10.4%	35,395	10.1%	89.2	9.1	19.7%	Dec	ICAO
			Thomas Cook Airlines	UK	28,417	7.2%	31,416	6.9%	90.5	8.1	10.6%	Dec	UK CAA
33	33		IndiGo	India	65,996	25.7%	76,001	25.5%	86.8	61.9	25.8%	Dec	
34	34		AirAsia Group	Malaysia	55,962	10.2%	66,261	13.6%	84.5	44.4	13.7%	Dec	
			AirAsia	Malaysia	41,225	8.3%	48,452	12.0%	85.1	32.3	10.8%	Dec	
35	35		Wizz Air	Hungary	54,433	20.8%	58,836	19.6%	92.5	33.8	19.6%	Dec	
36	36		Spirit Airlines	USA	49,222	24.3%	58,359	22.6%	84.3	28.7	18.6%	<	



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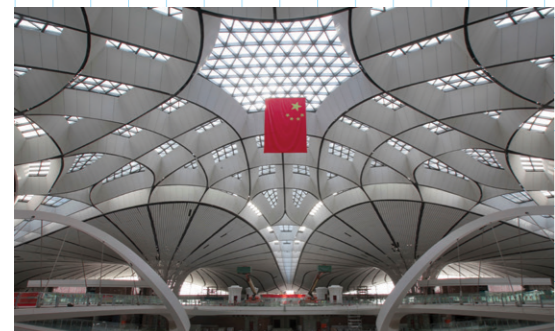
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2018 Rank	2017 Rank	Airline/Group	Country/district	Traffic		Capacity		Load factor	Passengers		Year ending	Notes
				RPKs (m)	Change	ASKs (m)	Change	%	Pax (m)	Change		
53	51	Virgin Australia Group	Australia	38,857	3.4%	48,575	3.7%	80.0	24.9	2.7%	Jun	RPK calculated
		Virgin Australia	Australia	33,262	4.6%	42,262	4.8%	78.7	20.2	2.5%	Jun	
		Tigerair Australia	Australia	5,595	-3.2%	6,313	-3.0%	88.6	4.6	3.4%	Jun	
54	53	Gol	Brazil	38,361	3.1%	48,010	2.8%	79.9	33.5	3.0%	Dec	
55	58	TAP Air Portugal	Portugal	38,000	9.5%	47,000	12.3%	80.9	15.8	10.5%	Dec	
56	60	Shandong Airlines (EST)	China	37,000	12.2%	44,000	10.1%	83.2	25.5	10.9%	Dec	RPK, ASK, LF: AB est
57	56	Air New Zealand	New Zealand	36,638	6.5%	45,222	5.4%	83.2	17.3	5.7%	Dec	
58	59	Vietnam Airlines	Vietnam	36,300	2.0%	44,700	4.9%	81.4	22.0	0.5%	Dec	
59	57	Virgin Atlantic Airways	UK	36,215	5.3%	46,712	7.5%	77.5	5.2	6.4%	Dec	
60	55	Alitalia (EST)	Italy	35,850	0.3%	45,500	0.2%	78.8	21.5	0.5%	Dec	RPK, ASK, LF: AB est
61	62	Spring Airlines	China	34,683	14.7%	38,965	16.7%	89.0	19.5	13.7%	Dec	
62	63	Finnair	Finland	34,660	12.7%	42,386	14.8%	81.8	13.3	11.6%	Dec	
63	64	Copa Airlines	Panama	34,639	8.1%	41,538	7.9%	83.4	10.1	6.3%	Dec	
64	65	Frontier Airlines	USA	33,588	10.4%	39,330	11.6%	85.4	19.4	15.7%	Dec	
65	66	S7 Airlines Group	Russia	33,169	11.2%	38,542	9.9%	86.1	16.0	12.0%	Dec	
		S7 Airlines	Russia	22,027	15.3%	25,465	13.6%	86.5	11.6	17.2%	Dec	
		Globus	Russia	11,141	3.9%	13,077	3.3%	85.2	4.4	6.3%	Dec	
66	61	Malaysia Airlines (EST)	Malaysia	32,000	-3.0%	41,000	-3.1%	78.0	13.5	-3.6%	Dec	AB estimate
67	67	Pegasus (EST)	Turkey	30,390	5.1%	35,543	8.6%	85.5	30.0	7.9%	Dec	RPK calculated
68	72	Juneyao Airlines	China	30,021	9.5%	34,812	10.4%	86.2	18.9	13.2%	Dec	
69	68	AirAsia X	Malaysia	29,112	1.9%	36,046	2.8%	80.8	6.2	6.9%	Dec	
70	69	Volaris	Mexico	28,558	11.5%	33,805	11.4%	84.5	18.4	12.0%	Dec	
71	70	Air Europa	Spain	28,146	8.4%	33,833	7.2%	83.2	11.8	11.7%	Dec	
72	73	Capital Airlines	China	27,983	9.0%	31,486	9.8%	88.9	15.5	0.6%	Dec	ICAO
73	71	Hawaiian Airlines	USA	27,636	5.3%	32,455	6.1%	85.2	11.8	2.9%	Dec	
74	81	Vietjet	Vietnam	26,652	33.8%	31,512	36.0%	84.6	23.0	34.5%	Dec	
75	78	Jet2	UK	26,511	28.3%	28,995	27.1%	91.4	12.2	25.5%	Dec	
76	75	Oman Air	Oman	25,033	14.0%	31,656	7.7%	79.1	9.5	10.6%	Dec	
77	79	Azul	Brazil	24,157	16.4%	29,352	16.0%	82.3	22.6	5.0%	Dec	
78	74	El Al	Israel	22,895	1.6%	27,324	2.5%	83.8	5.6	0.0%	Dec	ICAO
79	80	Flydubai (EST)	UAE	22,500	8.8%	30,167	8.3%	74.6	11.0	0.9%	Dec	RPK: AB estimate
80	76	Cebu Pacific Air	Philippines	21,736	2.0%	25,881	-1.3%	84.0	20.3	3.0%	Dec	
81	84	Ural Airlines	Russia	21,698	13.0%	26,364	13.4%	82.3	9.0	12.5%	Dec	
82	82	Thai AirAsia	Thailand	21,243	8.8%	25,019	11.8%	84.9	21.6	9.1%	Dec	
83	83	Air Transat (EST)	Canada	20,500	4.3%	24,000	4.8%	85.4	5.0	5.3%	Oct	AB estimate
84	77	Aerolineas Argentinas	Argentina	20,032	-1.8%	25,365	0.1%	79.0	9.5	2.2%	Dec	
85	88	Allegiant Air	USA	19,744	10.7%	23,646	8.4%	83.5	13.7	11.6%	Dec	
86	89	SpiceJet	India	19,686	12.5%	21,248	13.1%	92.6	19.3	11.5%	Dec	
87	86	Egyptair	Egypt	19,650	6.4%	27,504	2.7%	71.4	8.7	2.4%	Dec	AACO/ICAO
88	87	Azur Air	Russia	19,096	6.3%	19,912	7.1%	95.9	4.2	13.1%	Dec	
89	85	South African Airways (EST)	South Africa	19,000	0.3%	26,000	0.4%	73.1	6.0	0.0%	Dec	AB estimate
90	93	Interjet	Mexico	18,127	20.4%	22,308	13.6%	81.3	13.9	12.2%	Dec	
91	94	Republic Airline	USA	17,954	11.1%	22,780	7.1%	78.8	18.6	10.1%	Dec	
92	95	Jeju Air	South Korean	17,701	25.7%	20,134	27.6%	87.9	12.0	14.3%	Dec	
93	90	Air Arabia (EST)	UAE	17,000	3.5%	21,000	2.3%	81.0	8.7	2.4%	Dec	RPK/ASK: AB estimate
94	91	Royal Air Maroc (EST)	Morocco	16,750	-0.6%	23,500	-0.7%	71.3	7.3	0.0%	Dec	AB estimate
95	92	SriLankan Airlines	Sri Lanka	16,500	8.0%	20,000	8.2%	82.5	6.2	6.2%	Dec	AB estimate
96	99	Ukraine International	Ukraine	16,302	21.4%	20,231	20.7%	80.6	8.0	16.1%	Dec	
97	101	LOT Polish Airlines (EST)	Poland	16,000	26.4%	21,000	29.4%	76.2	8.8	18.9%	Dec	RPK/ASK: AB estimate
98	100	Avianca Brazil	Brazil	15,960	24.4%	19,266	26.9%	82.8	12.3	10.4%	Dec	
99	98	SunExpress (EST)	Turkey	15,500	10.7%	19,000	10.1%	81.6	9.7	10.2%	Dec	RPK/ASK: AB estimate
100	97	Aegean Airlines	Greece	14,435	4.2%	17,245	3.5%	83.7	14.0	5.8%	Dec	

Notes: Subsidiaries have been listed for major operating groups but are not included in the group analysis. While this table functions as a ranking of discrete airline groups by traffic and their prominent subsidiaries, in some cases it is impossible and/or illogical to split data from airline groups into individual operating units. Furthermore, in some instances the figures for an airline will incorporate those of a co-branded regional operator. While we have endeavoured to compare like-for-like businesses, the rankings are indicative. Subsidiaries have been listed where RPKs total more than 8,000m or more than 10% of a group's operations. Estimates have been used for indicative purposes. Segment figures are used for cargo and leisure operators where individual airline data is unavailable; TRAFFIC/CAPACITY/LOADS Traffic data generally includes scheduled and charter. All data is in metric units as follows: RPK=revenue passenger km, ASK=available seat km, RTK=revenue tonne km, 1 US ton=1.1 tonnes and 1 mile=1.609km; YEAR Results are for the calendar year, including calculation of monthly traffic totals, though fiscal year data is used where required; SOURCES Data is sourced from company replies to Airline Business or company reports. Other sources include national regulators, regional airline associations and ICAO

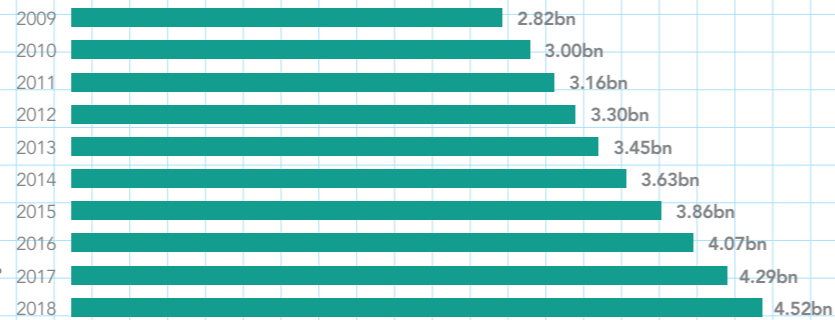
AIRPORT LEADERS

Preliminary figures collated by Cirium covering the biggest 100 airports in the world show passenger numbers increased by 5.3% during 2018. While that is slightly down on the 5.6% rise across the largest gateways the previous year, it still represents healthy growth



Beijing's second airport, Daxing, opens this year

10-year trend: traffic at top 100 airports



JOINING THE CENTURY CLUB

Delta Air Lines' main hub at Atlanta Hartsfield-Jackson International remains the largest airport in the world. It handled 107.4 million passengers in 2018, an increase of 3.3%.

Beijing Capital became the second airport in the world to pass the 100 million passenger mark. The airport enjoyed a further 5.4% rise in traffic as passenger numbers reached 100.9 million. That comes in a big year for the Beijing airport system, as the city's new Daxing facility is set to open later in 2019.

Beijing and another Chinese hub, Shanghai Pudong, were the only two of the 10 biggest airports to report passenger growth in excess of 5% last year. Passenger levels rose 5.8% at Pudong, the ninth-biggest airport in the world, handling just over 74 million passengers.

Los Angeles and Tokyo Haneda were the only airports among the top 10 to change positions. Passenger growth of 3.5% at Los Angeles

to 87.5 million ranked the US hub fourth-biggest in the world, putting it ahead of Haneda, which handled 87.1 million.

Dubai International is the third-biggest airport in the world, catering for just over 89 million passengers last year. But this marked growth of only a little over 1% – the slowest rate at the airport for well over a decade.

Airports in Asia-Pacific account for more than one-third of the top 100 and the largest share of passengers, with more than 1.7 billion. The next biggest category, North American airports, which accounted for 1.3 billion passengers, has 26 hubs in the top 100. Europe comprises 29 of the 100 biggest facilities, which between them account for almost 1.2 billion passengers. There remain no African airports among the 100 biggest in the world.

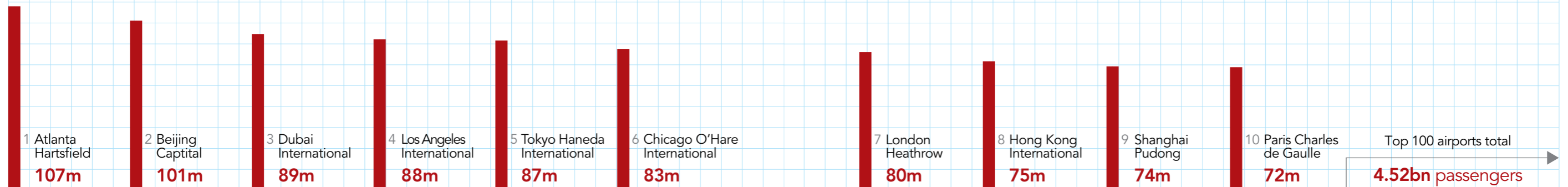
There are 24 US airports among the 100 biggest, the next-highest number for a country being the 17 Chinese hubs that feature in the top 100.

Atlanta remains the biggest airport in the world



MATT CAMPBELL/EPA/REX/Shutterstock

Top 10 airports by passenger traffic



RAPID RISERS

Figures show that 11 of the 100 biggest airports boosted passenger numbers at a double-digit rate in 2018, including a 29% jump at Bengaluru's Kempegowda airport. It handled 32.3 million passengers, placing it 65th in the rankings.

The recovery in Turkish tourism after the challenges of recent years was again evident in passenger growth of more than one-fifth at Antalya airport in 2018, reaching a total of 31.6 million.

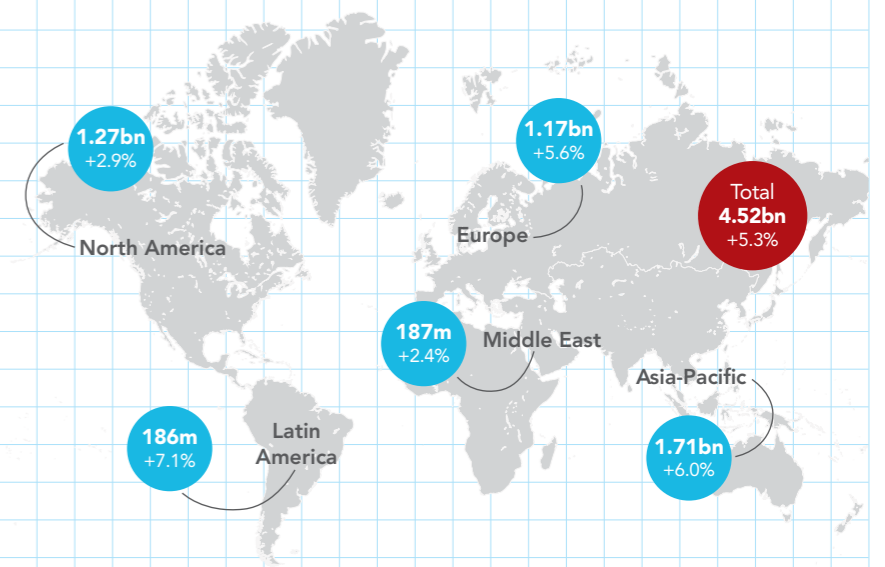
Moscow Sheremetyevo International airport, which added 23 new routes and six carriers during 2018 – recorded the third-highest growth rate of leading hubs last year. Passenger numbers climbed 14% to over 45 million at the Russian airport, ranking it in 41st place in the table for 2018.

Low-cost and leisure traffic helped deliver double-digit growth at European airports Athens, Milan Malpensa and Vienna, while Chinese airports Zhengzhou Xinzheng and Nanjing Lukou logged growth of 13% and 11% respectively.

Sao Paulo Guarulhos and Fort Lauderdale were the only Latin American and North American airports to record double-digit growth in the top 100 last year.

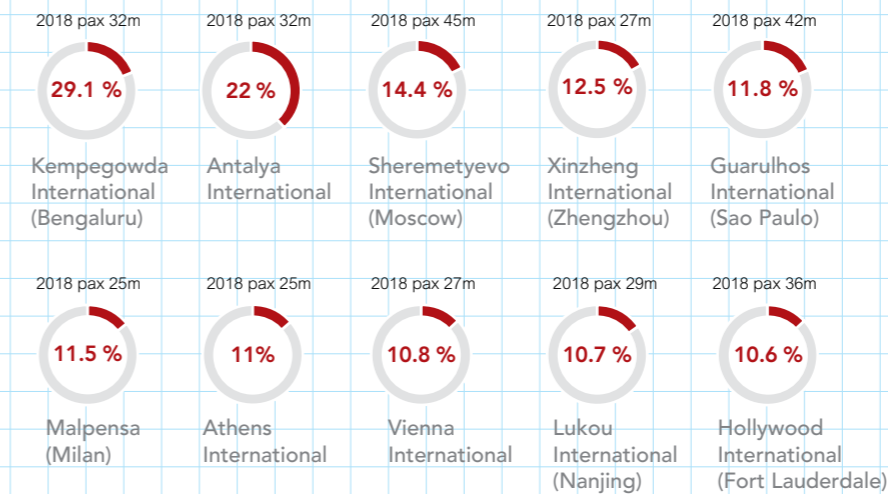
Passenger numbers fell at just five of the 100 biggest airports last year.

Regional split by passengers, top 100 airports



Note: No African airports featured in the top 100

Fastest-growing passenger traffic among top 100 airports



Note: Ranking based on year-on-year change in passenger traffic from the top 100 airports



Passengers increased 14% at Moscow's Sheremetyevo

Maxim Shipilov/EPA/REX/Shutterstock

TOP 100 AIRPORTS BY TRAFFIC

Passenger numbers among the 100 biggest global hubs increased by more than 5% during 2018, according to Cirium analysis of preliminary figures for last year, including a second airport passing the landmark 100 million mark

Top 100 airports: preliminary passenger ranking 2018 (1-50)

Rank	2018	2017	City	Airport	Code	Country	2018 passengers		Seat share of two leading carriers (marketing airline)			
							Number (000)	Change %	Carrier 1		Carrier 2	
1	1	Atlanta	Hartsfield Int'l	ATL	USA	107,394	3.3	Delta Air Lines	78%	Southwest Airlines	11%	
2	2	Beijing	Capital	PEK	China	100,983	5.4	Air China	39%	China Southern Airlines	14%	
3	3	Dubai	International	DXB	UAE	89,149	1.0	Emirates Airline	65%	Flydubai	13%	
4	5	Los Angeles	International	LAX	USA	87,534	3.5	American Airlines	20%	Delta Air Lines	16%	
5	4	Tokyo	Haneda Int'l	HND	Japan	87,099	2.1	All Nippon Airways	50%	Japan Airlines	33%	
6	6	Chicago	O'Hare International	ORD	USA	83,400	4.5	United Airlines	48%	American Airlines	34%	
7	7	London	Heathrow	LHR	UK	80,102	2.7	British Airways	46%	Virgin Atlantic	5%	
8	8	Hong Kong	International	HKG	Hong Kong	74,688	2.5	Cathay Pacific Airways	31%	Cathay Dragon	16%	
9	9	Shanghai	Pudong International	PVG	China	74,054	5.8	China Eastern Airlines	28%	Shanghai Airlines	9%	
10	10	Paris	Charles de Gaulle	CDG	France	72,230	4.0	Air France	51%	EasyJet	7%	
11	11	Amsterdam	Schiphol	AMS	Netherlands	70,957	3.7	KLM	50%	EasyJet	9%	
12	16	Delhi	Indira Gandhi Int'l	DEL	India	69,867	10.1	Indigo	28%	Air India	20%	
13	13	Guangzhou	Baiyun International	CAN	China	69,720	5.9	China Southern Airlines	46%	China Eastern Airlines	8%	
14	14	Frankfurt	International	FRA	Germany	69,510	7.8	Lufthansa	63%	Condor	3%	
15	12	Dallas/Fort Worth	International	DFW	USA	69,113	3.0	American Airlines	87%	Spirit	3%	
16	19	Seoul	Incheon International	ICN	South Korea	68,260	10.0	Korean Air Lines	26%	Asiana Airlines	17%	
17	15	Istanbul	Ataturk International	IST	Turkey	67,981	6.0	Turkish Airlines	81%	Atlasglobal	4%	
18	17	Jakarta	Soekarno Hatta Int'l	CGK	Indonesia	66,908	6.2	Garuda Indonesia	29%	Lion Airlines	23%	
19	18	Singapore	Changi	SIN	Singapore	65,630	5.5	Singapore Airlines	29%	Scot	12%	
20	20	Denver	International	DEN	USA	64,495	5.1	United Airlines	46%	Southwest Airlines	29%	
21	22	Bangkok	Suvarnabhumi	BKK	Thailand	62,815	6.3	Thai Airways	29%	Bangkok Airways	9%	
22	21	New York	JFK	JFK	USA	61,909	4.2	Delta Air Lines	28%	JetBlue Airways	23%	
23	23	Kuala Lumpur	International	KUL	Malaysia	59,959	2.4	AirAsia	37%	Malaysia Airlines	23%	
24	25	Madrid	Barajas	MAD	Spain	57,891	8.4	Iberia	33%	Air Europa	16%	
25	24	San Francisco	International	SFO	USA	57,793	3.5	United Airlines	46%	Alaska Airlines	12%	
26	26	Chengdu	Shuangliu Int'l	CTU	China	52,951	6.3	Air China	25%	Sichuan Airlines	20%	
27	28	Barcelona	El Prat	BCN	Spain	50,172	6.1	Vueling Airlines	39%	Ryanair	15%	
28	29	Mumbai	International	BOM	India	49,877	5.7	Jet Airways	24%	Indigo	22%	
29	31	Seattle	Tacoma International	SEA	USA	49,850	6.2	Alaska Airlines	52%	Delta Air Lines	25%	
30	27	Las Vegas	McCarran Int'l	LAS	USA	49,717	2.5	Southwest Airlines	40%	Delta Air Lines	10%	
31	30	Toronto	Pearson International	YYZ	Canada	49,507	5.0	Air Canada	57%	WestJet	17%	
32	33	Shenzhen	Baoan International	SZX	China	49,349	8.2	Shenzhen Airlines	27%	China Southern Airlines	25%	
33	36	Mexico City	Benito Juarez Int'l	MEX	Mexico	47,701	6.6	Aeromexico	44%	InterJet	22%	
34	38	Orlando	International	MCO	USA	47,697	6.9	Southwest Airlines	24%	Delta Air Lines	13%	
35	37	Kunming	Changshui Int'l	KMG	China	47,088	5.3	China Eastern Airlines	39%	Lucky Air	13%	
36	35	Taipei	Taoyuan International	TPE	Taiwan	46,530	3.7	China Airlines	25%	EVA Air	22%	
37	32	Charlotte	Douglas	CLT	USA	46,444	1.2	American Airlines	91%	Delta Air Lines	4%	
38	39	Munich	International	MUC	Germany	46,254	3.8	Lufthansa	61%	Euro Wings	5%	
39	34	London	Gatwick	LGW	UK	46,075	1.1	EasyJet	42%	British Airways	17%	
40	42	Newark	Liberty International	EWR	USA	46,065	6.2	United Airlines	66%	JetBlue Airways	6%	
41	50	Moscow	Sheremetyevo Int'l	SVO	Russia	45,348	14.4	Aeroflot	85%	Nordwind	6%	
42	44	Manila	Ninoy Aquino Int'l	MNL	Philippines	45,054	7.2	Cebu Pacific Air	32%	Philippine Airlines	30%	
43	40	Miami	International	MIA	USA	45,044	2.2	American Airlines	67%	Delta Air Lines	6%	
44	41	Phoenix	Sky Harbor	PHX	USA	44,944	2.3	American Airlines	44%	Southwest Airlines	35%	
45	46	Xian	Xiayang Int'l	XIY	China	44,654	6.7	China Eastern Airlines	30%	Hainan Airlines	10%	
46	43	Sydney	Kingsford Smith Int'l	SYD	Australia	44,400	2.5	Qantas Airways	34%	Virgin Australia	21%	
47	48	Houston	George Bush	IAH	USA	43,808	7.6	United Airlines	77%	American Airlines	6%	
48	45	Shanghai	Hongqiao Int'l	SHA	China	43,646	4.2	China Eastern Airlines	33%	Shanghai Airlines	16%	
49	47	Rome	Fiumicino	FCO	Italy	42,995	4.9	Alitalia	41%	Vueling Airlines	7%	
50	49	Tokyo	Narita International	NRT	Japan	42,601	4.7	All Nippon Airways	17%	Japan Airlines	13%	

Top 100 airports: preliminary passenger ranking 2018 (51-100)

Rank	2018	2017	City	Airport	Code	Country	2018 passengers		Seat share of two leading carriers (marketing airline)			
							Number (000)	Change %	Carrier 1		Carrier 2	
51	54	Sao Paulo	Guarulhos Int'l	GRU	Brazil	42,230	11.8	LATAM Airlines Brazil	33%	Gol	22%	
52	51	Chongqing	Jiangbei Int'l	CKG	China	41,596	7.4	Sichuan Airlines	12%	Air China	12%	
53	52	Boston	Logan International	BOS	USA	40,942	6.6	JetBlue	31%	Delta Air Lines	19%	
54	55	Bangkok	Don Mueang Int'l	DMK	Thailand	40,564	9.1	Thai AirAsia	41%	Thai Lion Air	25%	
55	57	Hangzhou	Xiaoshan Int'l	HGH	China	38,242	7.5	Air China	15%	China Southern Airlines	13%	
56	56	Melbourne	Tullamarine	MEL	Australia	38,073	4.3	Qantas Airways	30%	Virgin Australia	24%	
57	53	Minneapolis-St Paul	International	MSP	USA	38,037	0.0	Delta Air Lines	70%	Sun Country	8%	
58	61	Fort Lauderdale	Hollywood Int'l	FLL	USA	35,963	10.6	JetBlue	22%	Southwest Airlines	22%	
59	60	Jeddah	King Abdulaziz Int'l	JED	Saudi Arabia	35,800	5.4	Saudia	51%	Flynas	8%	
60	59	Detroit	Wayne County	DTW	USA	35,237	1.5	Delta Air Lines	73%	Spirit	11%	
61	58	Doha	International	DOH	Qatar	34,500	-2.2	Qatar Airways	89%	Indigo	2%	
62	63	Istanbul	Sabiha Gokcen Int'l	SAW	Turkey	34,137	8.8	Pegasus	64%	Turkish Airlines	31%	
63	62	Paris	Orly	ORY	France	33,121	3.4	Air France	32%	Transavia France	14%	
64	64	Bogota	El Dorado Int'l	BOG	Colombia	32,716	5.6	Avianca	61%	LATAM Airlines Chile	14%	
65	83	Bengaluru	Kempegowda Int'l	BLR	India	32,332	29.1	Indigo	47%	AirAsia India	11%	
66	68	Philadelphia	International	PHL	USA	31,700	7.1	American Airlines	71%	Southwest Airlines	7%	
67	79	Antalya	International	AYT	Turkey	31,566	22.0	Turkish Airlines	25%	SunExpress	23%	
68	67	Dublin	International	DUB	Ireland	31,500	6.4	Ryanair	40%	Aer Lingus	36%	
69	70	Zurich	Zurich	ZRH	Switzerland	31,113	5.8	Swiss	54%	Edelweiss	6%	
70	71	Copenhagen	Kastrup	CPH	Denmark	30,299	3.8	SAS	40%	Norwegian	16%	
71	69	New York	LaGuardia	LGA	USA	30,094	2.0	Delta Air Lines	42%	American Airlines	27%	
72	66	Jeju	International	CJU	South Korea	29,455	-0.5	Asiana Airlines	19%	Jeju Air	16%	
73	65	Moscow	Domodedovo Int'l	DME	Russia	29,404	-4.1	S7 Airlines	47%	Ural Airlines	16%	
74	73	Palma de Mallorca	Palma de Mallorca	PMI	Spain	29,082	4.0	Vueling Airlines	17%	Ryanair	17%	
75	76	Lisbon	Lisbon	LIS	Portugal	29,032	8.9	TAP Portugal	52%	Ryanair	11%	
76	72	Osaka	Kansai Int'l	KIX	Japan	28,936	3.4	Peach	12%	All Nippon Airways	9%	
77	81	Nanjing	Lukou Int'l	NKG	China	28,582	10.7	China Eastern Airlines	27%	China Southern Airlines	12%	
78	75	Oslo	Gardermoen	OSL	Norway	28,500	3.8	SAS	64%	Norwegian	8%	
79	74	Manchester	International	MAN	UK	28,300	1.7	Ryanair	18%	EasyJet	17%	
80	80	London	Stansted	STN	UK	28,000	8.1	Ryanair	78%	EasyJet	11%	
81	84	Riyadh	King Khalid Int'l	RUH	Saudi Arabia	27,900	9.7	Saudia	57%	Flynas	13%	
82	89	Zhengzhou	Xinzheng Int'l	CGO	China	27,335	12.5	China Southern Airlines	26%	Hainan Airlines	8%	
83	78	Baltimore	Washington Int'l	BWI	USA	27,146	2.9	Southwest Airlines	67%	Spirit	11%	
84	88	Vienna	Vienna	VIE	Austria	27,037	10.8	Austrian	44%	Euro Wings	8%	
85	77	Stockholm	Arlanda	ARN	Sweden	26,847	0.9	SAS	56%	Norwegian	8%	
86	87	Xiamen	Gaoqi International	XMN	China	26,553	8.4	Xiamen Airlines	40%	Shangdong Airlines	14%	
87	91	Vancouver	International	YVR	Canada	25,937	7.3	Air Canada	49%	WestJet	21%	
88	85	Brussels	National	BRU	Belgium	25,676	3.6	Brussels Airlines	39%	Ryanair	8%	
89	90	Salt Lake City	International	SLC	USA	25,554	5.6	Delta Air Lines	71%	Southwest Airlines	11%	
90	93	Changsha	Huanghua Int'l	CSX	China	25,266	6.3	China Southern Airlines	21%	Hainan Airlines	12%	
91	99	Cancun	International	CUN	Mexico	25,202	6.8	Volaris	11%	American Airlines	10%	
92	107	Milan	Malpensa	MXP	Italy	24,725	11.5	EasyJet	25%	Ryanair	9%	
93	82	Seoul	Gimpo International	GMP	South Korea	24,603	-2.0	Korean Air Lines	23%	Asiana Airlines	20%	
94	104	Fukuoka	International	FUK	Japan	24,600	3.4	All Nippon Airways	34%	Japan Airlines	17%	
95	104	Qingdao	Liuting International	TAO	China	24,536	5.7	Shangdong Airlines	27%	China Eastern Airlines	21%	
96	100	Wuhan	Tianhe International	WUH	China	24,500	5.9	China Southern Airlines	30%	China Eastern Airlines	21%	
97	86	Dusseldorf	International	DUS	Germany	24,284	-1.4	Euro Wings	41%	Lufthansa	9%	
98	106	San Diego	International	SAN	USA	24,238	9.3	Southwest Airlines	42%	Alaska Airlines	14%	
99	109	Athens	International	ATH	Greece	24,136	11.0	Olympic Air	25%	Aegean Airlines	21%	
100	102	Haikou	Meilan International	HAK	China	24,124	6.8	Hainan Airlines	25%	China Southern Airlines	18%	
Total							4,516,463	5.3				

Notes: EST* Airline Business estimate used where full-year figures not available for indicative purposes. Source: Cirium research based on preliminary traffic figures published by airports/regulators, which are in many cases reported on a terminal passenger basis and exclude a small number of transit passengers. Airline capacity shares based on Cirium schedules data for March 2019, based on seats offered by marketing airline

AIRLINE START-UPS AND SUSPENSIONS

After a challenging first few months of the year in which a number of high-profile carriers were forced to suspend operations amid mounting financial problems, the summer months have largely proved a stable period in which activity has focused on start-up projects.

It does, however, remain to be seen to what extent that proves a pause, rather than a shift in the dynamic – notably in Europe where the busy summer period is always kinder on airline cash-flows – while efforts to revive some of the big-name casualties have struggled for momentum.

AIRLINE GROUNDINGS

India's Jet Airways is the largest airline failure of the year. The carrier had been forced to ground an increasing portion of its fleet – as its liquidity problems continued to mount – over the start of the year before ultimately ceasing operations in mid-April.

Subsequent efforts to secure fresh investment in the airline have thus far failed to secure concrete commitments.

A deadline for the latest expressions of interest initiative is the end of August, under a process which envisages final bids submitted by mid-October.

A teaser document released on 20 July to prospective applicants shows that the airline still has 12 aircraft in its fleet, comprising six Boeing 777-300ERs, three Airbus A330-300s and three 737s. The widebody jets are under finance leases, while the 737s are owned by the company. Most of its other aircraft have since been repossessed by lessors and banks.

Airline failures 2019 year to date (selected)

Airline	Country	Suspended ops
Avianca Argentina	Argentina	09/06/2019
Avianca Brazil	Brazil	24/05/2019
Flybmi	United Kingdom	16/02/2019
Germania	Germany	04/02/2019
InselAir	Curacao	26/02/2019
Jet Airways	India	27/04/2019
Joon	France	27/06/2019
Pskovavia	Russia	12/03/2019
Shaheen Air International	Pakistan	08/02/2019
Tajik Air	Tajikistan	10/01/2019
Wow Air	Iceland	28/03/2019

Source: Cirium data; carriers grounded as of 31 August 2019

If a new investor and resolution plan can be found, it looks unlikely that a revived Jet would be able to take back some of the route authorities and slots that have been temporarily farmed out to other carriers before the start of the northern winter scheduling season.

Brazil's aviation regulator meanwhile in May suspended Avianca Brazil's authority to operate commercial flights, prompting the redistribution of its take-off and landing slots. The move came after ANAC grounded Avianca Brazil in May due to safety concerns.

Ocean Air, the airline company that operates Avianca Brazil, entered bankruptcy administration in December 2018 with debt reportedly close to \$500 million.

The airline also formally leaves Star Alliance at the end of August – proving third-time unlucky for the alliance in Brazil. Its first alliance member from the country, founding member Varig, left in 2006 shortly before its collapse, while its replacement TAM was a member for only four years before moving to Oneworld following its merger with LAN.

Elsewhere, Avianca's Argentinian affiliate has filed for bankruptcy protection in an attempt to avoid liquidation and the cancellation of its air operator's certificate as a potential consequence of its prolonged grounding.

Avian Lineas Aereas, which operates under the Avianca Argentina brand and is part-owned by Avianca's Colombian parent Synergy Group, had announced on 9 June that it was suspending operations for 90 days, only 18 months after its launch in late 2017. It grounded its two ATR 72-600 turboprops, which were deployed on its two remaining domestic routes.

Chief executive Carlos Colunga says the airline will use the bankruptcy process to "reformulate its business model" while attempting to keep alive its only major asset, the AOC.

One brand in Europe to disappear over the summer was Air France's short-lived millennial adventure Joon, which completed its last flight on 26 June.

Plans for the unit had been drawn up in 2016 by Air France-KLM's then-chief executive Jean-Marc Janaillac amid a costly conflict between the French flag carrier and aircrew that was stymieing expansion ambitions.

European carriers had been among the hardest hit during first quarter of the year, notably including the likes of Wow Air, Flybmi and Germania.

NEW ENTRANTS

But new – or in some cases familiar – entrants have taken to the skies over the summer.

Uganda Airlines in late August completed a flight from Entebbe to Nairobi's Jomo Kenyatta International. A previous incarnation of the carrier ceased flights in 2001, following 24 years of operations. The new Uganda Airlines operates two Bombardier CRJ900s, Cirium fleets data shows, and has two Airbus A330-800s on order.

The carrier's booking engine on its website indicates it plans to fly to several other countries in Africa, including Tanzania, South Sudan, Somalia and Burundi.

Earlier in August, Ecuadorian start-up AeroRegional launched its inaugural route, connecting Quito with Cuenca. The airline, which will operate two Boeing 737-500s, obtained its air operator's certificate in May and is based in Quito.

A month earlier in July, Chinese start-up carrier Genghis Khan Airlines launched operations with the Comac ARJ21 aircraft. Genghis Khan Airlines has received two ARJ21s and plans to operate 25 of the type by 2024.

New Japanese budget carrier Zipair Tokyo meanwhile is on track for a 2020 launch, having in July been granted an air transport business license by Japan's Ministry of Land, Infrastructure, Transport and Tourism.

The budget arm of Japan Airlines will operate two Boeing 787-8 aircraft, each with 290 seats, on two daily services: Tokyo Narita-Bangkok Suvarnabhumi starting 14 May 2020, and Tokyo Narita-Seoul Incheon from 1 July 2020.

Dominican start-up Flycana plans to finalise its capitalisation and recertification processes by year-end, as it also targets an operational start next year. The carrier has aspirations to reach a 32-strong jet fleet by 2025.

Chief executive Frederik Jacobsen says the airline has selected a US-based investment bank to place Flycana shares worth \$80 million with both international and Dominican private and institutional investors.

"We will announce a lead investor soon," Jacobsen says. "Our capitalisation will be sufficient to stem the financial burden of quickly growing to a fleet size with a critical mass for a highly profitable ultra-low-cost business model."

Another project in Latin America in July saw newly constituted company Aerovias Internacionales del Uruguay file a request with national civil aviation authority DINACIA to get certificated as a commercial airline.

Start-up Great Dane Airlines has outlined plans for rapid growth, after launching scheduled flights in the summer initially with one Embraer 195. Great Dane has already begun charter flights before inaugurating scheduled services from Aalborg to Dublin, Edinburgh and Nice in June. The nascent carrier intends to take one to two additional E195s each year.

Nigerian start-up Ibom Air also began operating flights in June, across a number of domestic routes. The carrier says its inaugural service took off from Uyo's Victor Attah International airport, bound for Lagos. Ibom's website shows that it offers multiple flights per day from its Uyo base to Lagos and Abuja. The carrier is operating a pair of Bombardier CRJ900s, of which it took delivery in February.

In September, start-up carrier Air Antwerp will operate its first flight to London City airport, following the granting of its air operator's certificate by Belgium's civil aviation authority.

The Belgian airline, a joint venture between KLM and CityJet, will use a 50-seat Fokker 50 turboprop to operate three return weekday flights plus one Sunday evening service. KLM will be a codeshare partner on the route.

Air Antwerp was created to fill the space left by the collapse of VLM, which collapsed last autumn. The new carrier is 75% owned by Irish operator CityJet and 25% owned by KLM.

Another new European operator flew its first commercial flight in May: FlyBosnia launched initially from Sarajevo to Kuwait.

Air Astana's new budget arm operation, FlyArystan, also began operations in May. It has been operating six routes from Almaty using a pair of A320 narrowbodies, and has now identified Karaganda as a second base. It will begin operations from Kazakhstan's fourth-largest city in the second quarter of 2020.

Airlines launching flights during 2019 (selected)

Airline	Country	Launched ops
Bamboo Airways	Vietnam	16/01/2019
FlyArystan	Kazakhstan	01/05/2019
FlyBosnia	Bosnia-Herzegovina	02/05/2019
Genghis Khan Airlines	China	26/07/2019
Great Dane Airlines	Denmark	14/06/2019
Ibom Air	Nigeria	07/06/2019
JetSMART Argentina	Argentina	10/04/2019
Manta Air	Maldives	24/02/2019
Sky Airline Peru	Peru	08/04/2019
Star Air	India	25/01/2019

Source: Cirium; Airlines launching operations during during 2019 as of 31 August 2019

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