



**SNAPSHOT OF THE MALAYSIAN
CIVIL AVIATION INDUSTRY**

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Map of Civil Aerodromes and Passenger Numbers in Malaysia, in 2016



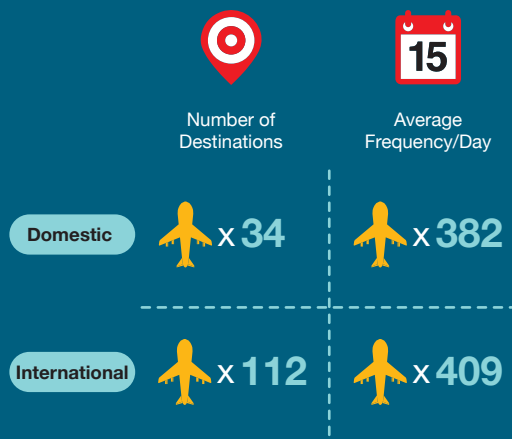
International	
1.	Langkawi: 2.6 Mil passengers
2.	Penang: 6.6 Mil passengers
3.	Kuala Lumpur: 52.6 Mil passengers
4.	Johor Bahru: 3.5 Mil passengers
5.	Kuching: 4.9 Mil passengers
6.	Kota Kinabalu: 7.2 Mil passengers

Domestic	
1.	Alor Setar: 787,706 passengers
2.	Kota Bharu: 2.0 Mil passengers
3.	Ipoh: 296,696 passengers
4.	Subang: 2.8 Mil passengers
5.	Melaka: 58,703 passengers
6.	Kuala Terengganu: 900,218 passengers
7.	Kerteh: 200,000 passengers
8.	Kuantan: 247,757 passengers
9.	Sibu: 1.4 Mil passengers
10.	Bintulu: 805,206 passengers
11.	Miri: 2.2 Mil passengers
12.	Mulu: 60,074 passengers
13.	Limbang: 55,437 passengers
14.	Labuan: 595,290 passengers
15.	Sandakan: 882,811 passengers
16.	Lahad Datu: 140,077 passengers
17.	Tawau: 1.2 Mil passengers

STOLport	
1.	Pangkor: 100,000 passengers
2.	Redang: 420,000 passengers
3.	Tioman: 100,000 passengers
4.	Tanjung Manis
5.	Mukah
6.	Kudat
7.	Semporna
8.	Marudi
9.	Long Akah
10.	Belaga
11.	Kapit
12.	Lawas, Long Pasia, Long Samado, Long Seridan, Ba'kelalan, Bario, Long Banga, Long Lellang

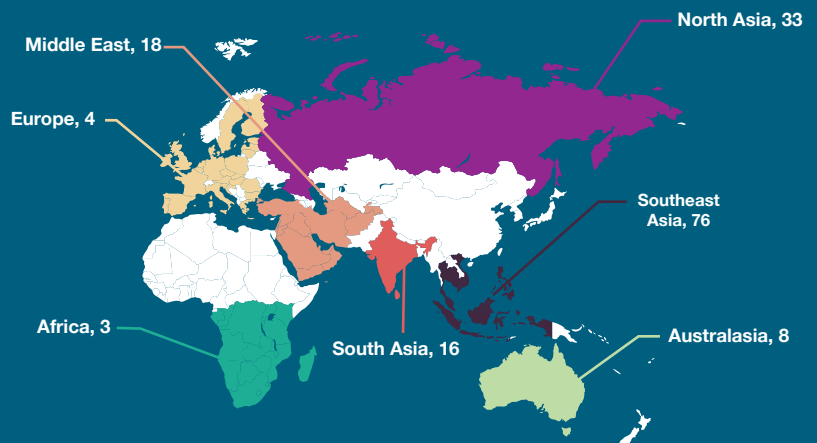
Source: Malaysia Airports Holdings Bhd. (MAHB), Senai Airport Terminal Services Sdn. Bhd. (Senai Airport), Sanzbury Stead Sdn. Bhd. (Sanzbury Stead)
 Note: STOLport stands for Short Take-Off and Landing airports

Malaysia's connectivity in 2016



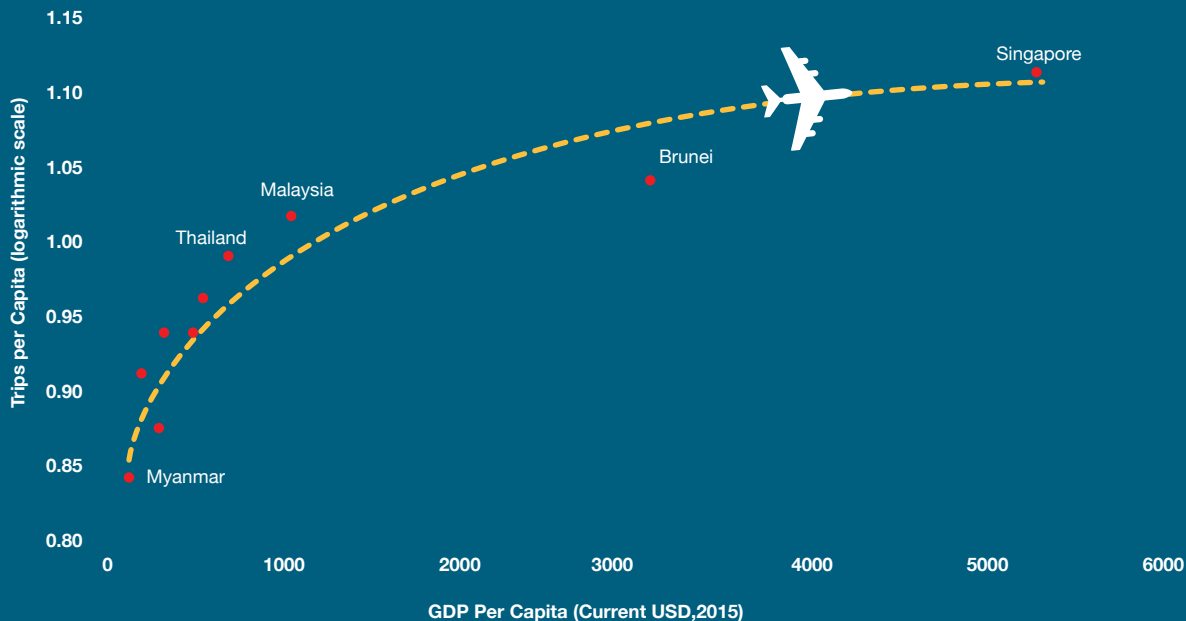
Source: MAVCOM Analysis, AirportIS

Malaysia's Connectivity - International Destinations Connected to Malaysia, as at 31 December 2016

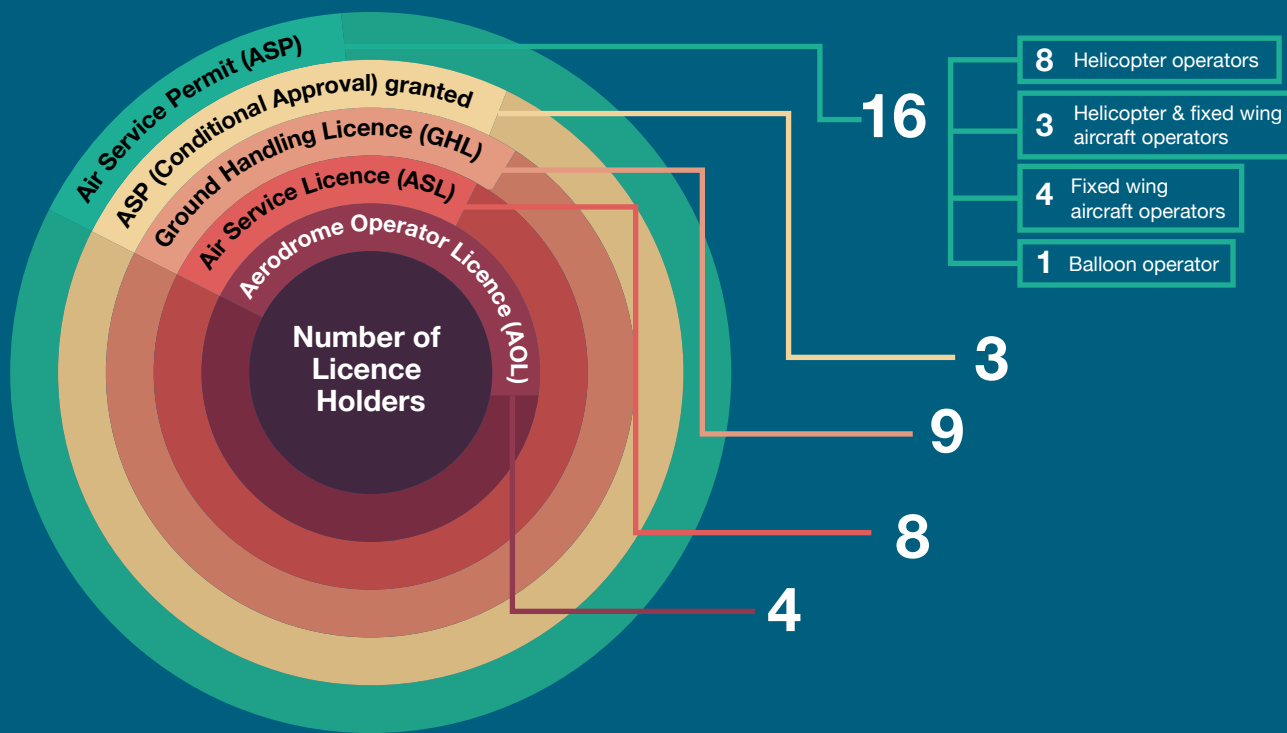


Source: AirportIS

Malaysia's Propensity to Fly



Source: MAVCOM Analysis, AirportIS, World Bank



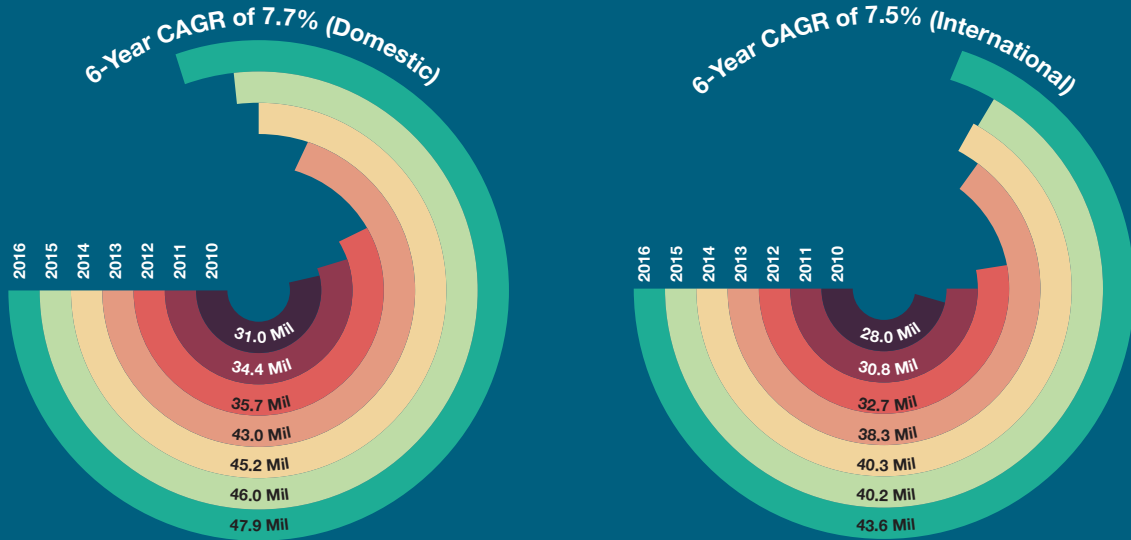
Source: MAVCOM Analysis

Total Foreign Airlines (Scheduled Services), as at 31 December 2016



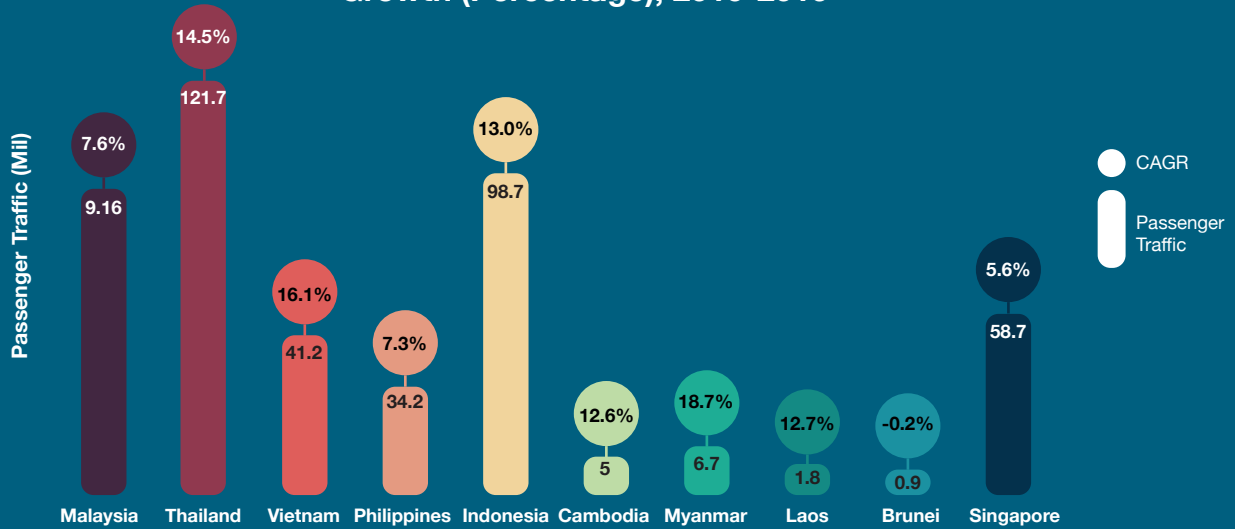
Source: MAVCOM Analysis

Malaysia's Passenger Traffic, 2010-2016



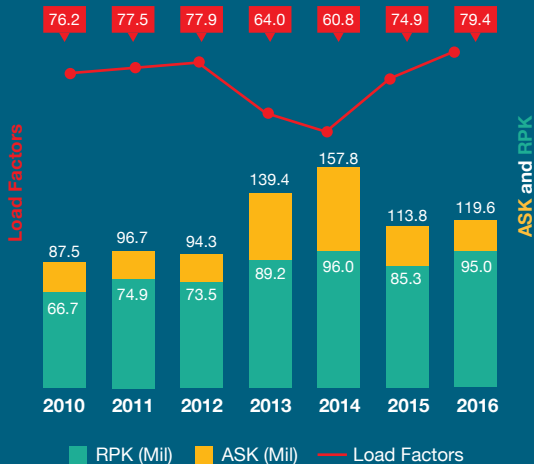
Source: MAHB, Senai Airport
 Note: CAGR stands for Compound Annual Growth Rate

Passenger Traffic vs. Compound Annual Growth Rate (CAGR) Growth (Percentage), 2010-2016



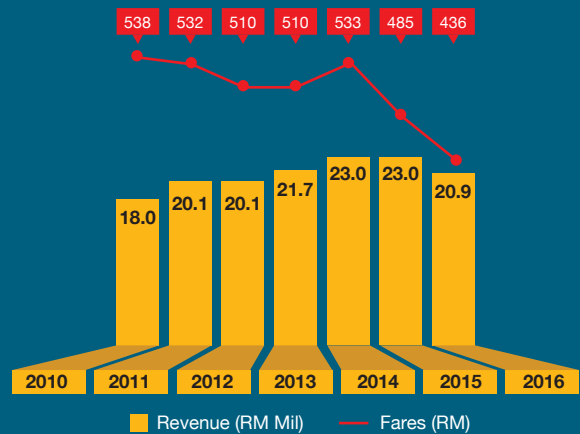
Source: MAHB, Senai Airport, AirportIS

Industry Available Seat Kilometer (ASK), Revenue Passenger Kilometer (RPK), 2010-2016



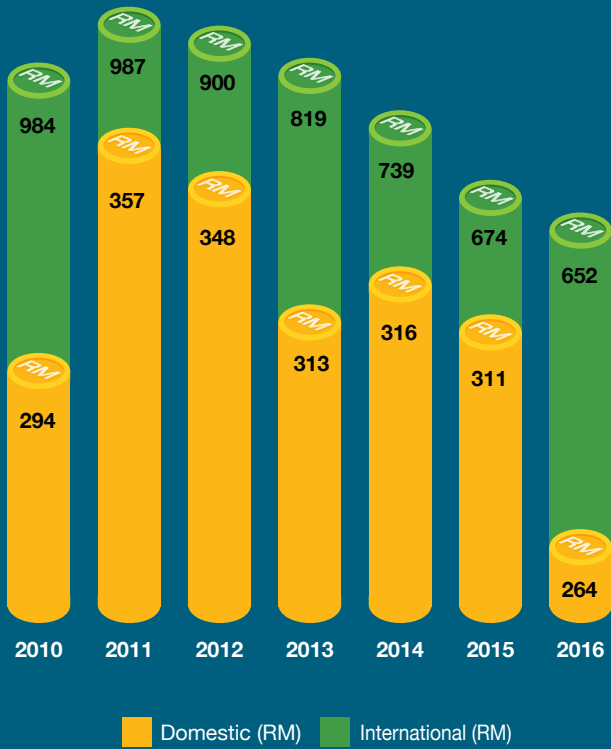
Source: MAVCOM Analysis

Revenue and Average Fares of Malaysian Carriers, 2010-2016



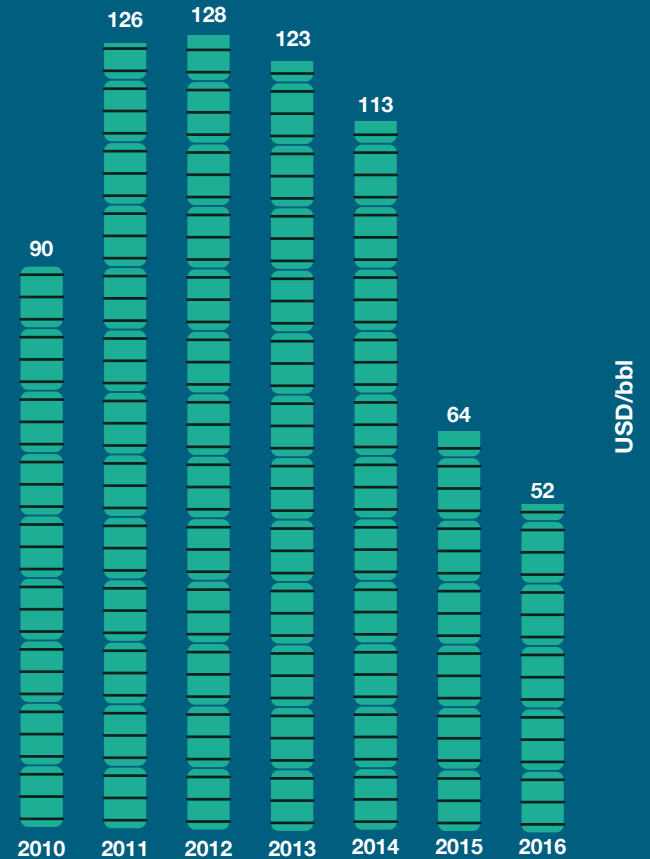
Source: MAVCOM Analysis, AirportIS
 Note: Revenue of Malaysian carriers had grown at CAGR of 2.5 per cent, but at the same time average fares had declined 3.4 per cent over the same period. Malaysian carriers refer to all Air Service Licence (ASL) holders that operate scheduled passenger services.

Domestic vs. International Average Fares, 2010-2016



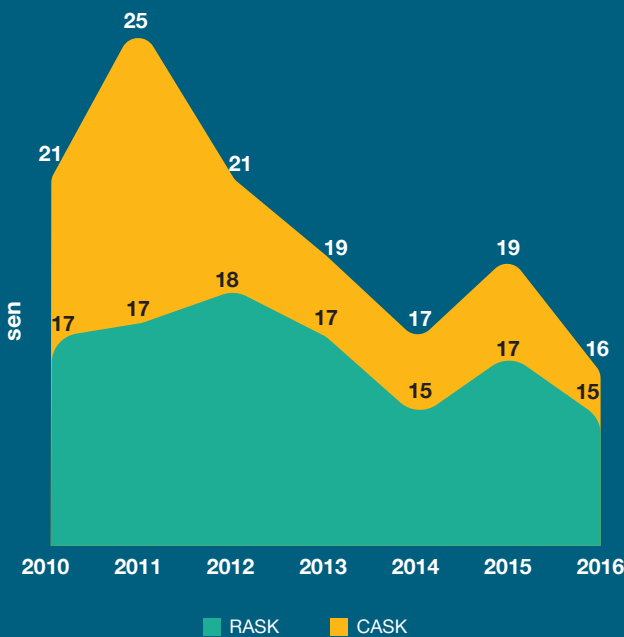
Source: MAVCOM Analysis, AirportIS
 Note: International fares had fallen by 6.6 per cent CAGR compared with domestic fares of only 1.8 per cent CAGR. However, domestic fares had been more volatile compared with international fares.

Global Average Jet Fuel Price, 2010-2016



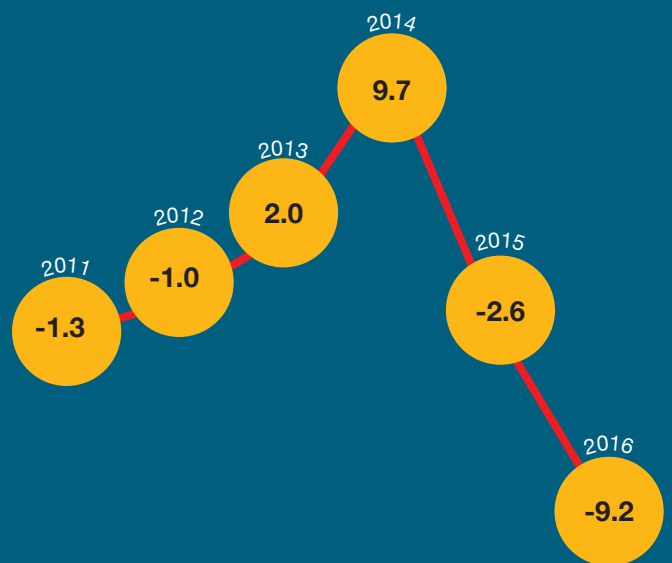
Source: MAVCOM Analysis, Thomson Reuters

Blended Revenue Per Available Seat Kilometer (RASK) vs. Cost Per Available Seat Kilometer (CASK) of Malaysian Carriers, 2010-2016



Source: MAVCOM Analysis

Malaysia Air Cargo Growth, 2010-2016



Source: MAHB, Senai Airport, Airports Council International (ACI), International Monetary Fund (IMF)
 Note: Malaysia's air cargo tonnage growth has a strong relationship with Malaysia's total trade value growth.