

AIRPORTS IN SOUTH-EAST AND EAST ASIA CAPITAL INVESTMENT PROGRAMMES - 2016



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B R O O K S M A R K E T I N T E L L I G E N C E R E P O R T S

AIRPORTS IN SOUTH-EAST AND EAST ASIA

CAPITAL INVESTMENT PROGRAMMES - 2016

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CONTENTS

INTRODUCTION	6
1. MARKET OVERVIEW	7
2. BRUNEI	11
Brunei International (BWN/WBSB)	11
3. CAMBODIA	12
Phnom Penh International (PNH/VDPP)	12
Phnom Penh International (new)	13
Siem Reap International (REP/VDSR)	13
Siem Reap International (new)	13
Sihanoukville International (KOS/VDSP)	13
4. INDONESIA	14
Balikpapan Sultan Aji Muhmmad Sulaiman Sepinggang International (BPN/WALL)	16
Bandung Husein Sastranegara International (BDO/WICC)	16
Bandung Majalengka International	16
Banjarmasin Syamsudin Noor (BDJ/WAOO)	17
Bululeng (new)	17
Denpasar Bali Ngurah Rai International (DPS/WADD)	17
Jakarta Halim Perdanakusuma (HLP/WIIH)	18
Jakarta Soekarno-Hatta International (CGK/WIII)	18
Jambi Sultan Thaha (DJB/WIPA)	19
Karawang International	19
Lombok Bandara International	20
Makassar Sultan Hasanuddin International (UPG/WAAA)	20
Mataram Selaparang (AMI/WADA)	21
Medan Kualanamu International (KNO/WIMM)	21
Padang Minangkabau International (PDG/WIPT)	21
Palembang Sultan Mahmud Badaruddin II (PLM/WIPP)	22
Pangkal Pinang Depati Amir (PGK/WIPK)	22
Pekanbaru Sultan Syarif Kasim II International (PKU/WIBB)	22
Pontianak Supadio International (PNK/WIOO)	23
Semarang Ahmad Yani International (SRG/WARS)	23
Silangit (SQT/WIMN)	23
Surabaya Juanda International (SUB/WARR)	23
Tanjung Pinang Raja Haji Fisabilillah (TNJ/WIDN)	24
Yogyakarta Aji Sutjipto (JOG/WARJ)	24
Yogyakarta Kulonprogo International	25
5. JAPAN	26
Chubu Centrair International (CENTRAIR) (NGO/RJGG)	26
Ishigaki (ISG/ROIG)	27
Kansai International (KIX/RJBB)	27
Okinawa Naha (OKA/ROAH)	28
Osaka International (ITM/RJOO)	28
Sapporo New Chitose (CTS/RJCC)	29

Tokyo Haneda International (HND/RJTT)	29
Tokyo Narita International (NRT/RJAA)	30
6. KOREA (SOUTH)	31
Jeju International (CJU/RKPC)	32
New Jeju International	32
Pusan Gimhae International (PUS/RKPK)	32
Seoul Gimpo International (GMP/RKSS)	33
Seoul Incheon International (ICN/RKSI)	33
7. LAOS	34
Lao New International	34
Luang Prabang International (LPQ/VLLB)	34
Vientiane Wattay International (VTE/MLVT)	35
8. MALAYSIA	36
Ipoh New International	37
Kota Kinabalu International (BKI/WBKK)	37
Kuala Lumpur International (KUL/WMKK)	38
Kulim International	38
Lahad Datu (LDU/WBKD)	39
Langkawi International (LGK/WMKL)	39
Miri (MYY/WBGR)	39
Penang International (PEN/WMKP)	39
Sandakan (SDK/WBKS)	40
9. MYANMAR	41
Hanthawaddy International	41
Mandalay International (MDL/VYMD)	42
Naypyidaw International (NYT/VYNT)	42
Yangon International (RGN/VYYY)	43
10. PHILIPPINES	44
Bicol International (Southern Luzon International)	45
Bongao Sanga-Sanga (SGS/RPMN)	45
Butuan Bancasi (BXU/RPME)	45
Clark International (CRK/RPLC)	46
Cotabato Awang (CBO/RPMC)	47
Dipolog (DPL/RPMG)	47
Iloilo International (ILO/RPVI)	47
Kalibo International (KLO/RPVK)	48
Laguindingan International (CGY/RPMY)	48
Mactan Cebu International (CEB/RPVM)	49
Manila Ninoy Aquino International (MNL/RPLL)	49
Manila (Sangley) International (new)	50
Naga (WNP/RPUN)	50
New Bohol (Panglao)	50
Pagadian (PAG/RPMP)	51
Puerto Princesa (PPS/RPVP)	51

San Vicente	51
Tacloban Daniel Z Romualdez (TAC/RPVA)	51
Zamboanga International	52
11. SINGAPORE	53
Singapore Changi International (SIN/WSSS)	53
12. TAIWAN	
Kaohsiung International (KHH/RCKH)	55
Taichung Cingcyuangang (RMQ/RCMQ)	56
Taipei Songshan (TSA/RCSS)	56
Taiwan Taoyuan International (TPE/RCTP)	56
13. THAILAND	58
Bangkok Don Mueang International (DMK/VTBD)	59
Bangkok Suvarnabhumi International (BKK/VTBS)	59
Chiang Mai International (CNX/VTCC)	60
Changmai International (new)	61
Hat Yai International (HDY/VTSS)	61
Phuket International (HKT/VTSP)	61
14. TIMOR-LESTE	63
Dili Presidente Nicolau Lobato International (DIL/WPDL)	63
15. VIETNAM	64
Ca Mau (CAH/WCM)	65
Chu Lai International (VCL/WCA)	65
Danang International (DAD/WVDN)	66
Hai Phong Cat Bi International (HPH/WCI)	66
Hanoi Noi Bai International (HAN/WVNB)	66
New Hanoi International	67
Ho Chi Minh City Tan Son Nhat International (SGN/WVTS)	67
Hue Phu Bai International (HUI/WVPB)	68
Lao Cai	68
Long Thanh International	68
Nha Trang Cam Ranh International (CXR/WVCR)	69
Phu Quoc International (PQC/WVPQ)	69
Pleiku (PXU/WPK)	70
Quang Ninh	70



INTRODUCTION

Now the world's largest air transport market, the Asia-Pacific region continues to register modest growth in passenger numbers, with cargo loadings growing at a similar rate. Analysts predict that growth will continue, stimulated by the planned liberalisation of air travel and of trade, as well as by increasing economic activity.

Steps to increase airport capacity to meet expected future demand are being taken in most countries in a region which for the purposes of this report is defined by Myanmar in the west, Malaysia and Indonesia in the south and Korea and Japan in the east. Airport developments in China are covered by a separate report in this series.

In this report the publishers aim to provide a concise review of development projects and plans at 105 principal airports in 14 countries in South-East and East Asia. Where available, indications of cost and timescale of each project are given, together with the traffic environment that is driving airport development. Government ministries or agencies responsible for airports are also listed.

The data contained in the report reflects the status of developments up to mid 2015. In most cases contact details are provided for the administrations responsible for each airport and Internet URLs are provided to aid further research.

January 2016

The Republic of Indonesia straddles South-East Asia and Oceania. It comprises 17,508 islands and shares land borders with Papua New Guinea, East Timor and Malaysia. The capital and largest city is Jakarta on the island of Java. With a total population of 238 million, it is the world's fourth most populous country. Administratively, it is divided into seven regions – Java, Kalimantan, Lesser Sunda Islands, Maluku Islands, Sulawesi, Sumatra and Western New Guinea, comprising 33 provinces. It is the largest economy in South-East Asia, based principally on the services, industrial and agricultural sectors.

Major airports and air traffic services in Indonesia come under the jurisdiction of PT Angkasa Pura Airports, which is divided into Angkasa Pura I and PT Angkasa Pura II, both state organisations under the Ministry of Transport. The remaining smaller airports are operated by UPT, which is part of the Directorate General of Air Transportation. The building of airport infrastructure in Indonesia has not been keeping pace with the growth in air traffic, with several airports recording increases in double figures. Plans are in hand to develop public-private partnership (PPP) schemes for 10 airports, with expressions of interest elicited for the three deemed the most attractive to private investment. These are Bandar Lampung Radin Inten II (TGK/WICT), Labuan Bajo Komodo (LBJ/WATO) and Palu Mutiara (PLW/WAML). The other seven on the government's list are Bengkulu Fatmawati Soekarno (BKS/WIPL), Jayapura Sentani (DJJ/WAJJ), Matahora, Palangkaraya Tjilik Riwut (PKY/WAOP), Tanjung Harapan (TJS/WALG), Tarakan Juwata International (TRK/WALR) and Ternate Sultan Babullah (TTE/WAMT).

According to an April 2014 statement by the Ministry, there are also plans to build another 62 new airports over the next five years, primarily in the eastern regions, to bring the total number of commercial airports in Indonesia to 299. It has budgeted IDR 71 trillion (USD 5.2 billion).

PT ANGKASA PURA I

PT Angkasa Pura I was established in 1964 and now operates 13 airports in Eastern Indonesia including Denpasar Bali Ngurah Raj (DPS/WADD), Surabaya Juanda (SUB/WARR), Makassar Sultan Hasanuddin (UPG/WAAA), Balikpapan Sultan Aji Muhammad Sulaiman Sepinggan (BPN/WALL), Biak Frans Kaisiepo (BIK/WABB), Manado Sam Ratulangi (MDC/WAMM), Banjarmasin Syamsudin Noor (BDJ/WAOO), Semarang Ahmad Yani (SRG/WARS), Yogyakarta Adi Sutjipto (JOG/WARJ), Surakarta Adisumarmo (SOC/WARQ), Lombok International (LOP/WADL), Ambon Pattimura (AMQ/WAPP) and Kupang El Tari (KOE/WATT). Some IDR 7.0 trillion (USD 510 million) has been allocated for the expansion of five airports – Denpasar Bali, Balikpapan, Semarang, Surabaya and Makassar – all of which operate over capacity – over the next two-three years. Some IDR 2 trillion will come from bank loans, with the remainder from internal funds.

In 2014 the 13 airports handled a total of 73,228,093 passengers, a small increase of 1.84 percent, with international traffic the key driver for the growth. International traffic accounted for 11,037,997 passengers, or 15.1 percent. Cargo showed a healthier improvement, up by 6.24 percent to 348,361 tonnes, of which international cargo amounted to 61,699 tonnes, or 17.7 percent. Aircraft movements totalled 544,307, a decline of 4.5 percent. Total revenue in 2013 was IDR 4.58 trillion (USD 331 million), a massive increase of 49.6 percent, with net profit amounting to IDR 929 billion (USD 67 million). The increase in revenues was derived entirely from non-aeronautical services.

Contact

Sulistyo Wimbo S Hardjito
 President Director
 PT Angkasa Pura I
 Tel: +62 21 654 1961
 Email: humas@angkasapura1.co.id
 Web: www.angkasapura1.co.id (Indonesian only)

PT ANGKASA PURA II

PT Angkasa Pura II was established on 3 October 1995, initially to manage and operate the two airports serving the capital city Jakarta. It now manages 13 airports in the Western region, including Jakarta Soekarno-Hatta International (CGK/WIII), Jakarta Halim Perdanakusuma (HLP/WIIH), Pontianak Supadio (PNK/WIOO), Padang Minangkabau (PDG/WIPT), Palembang Sultan Mahmud Badaruddin II (PLM/WIPP), Medan Kualanamu International (KNO/WIMM), Pekanbaru Sultan Syarif Kasim II (PKU/WIBB), Bandung Husein Sastranegara International (BDO/WICC), Banda Aceh Sultan Iskandarmuda (BTJ/WITT), Tanjung Pinang Raja Haji Fisabilillah (TNJ/WIDN), Jambi Sultan Thaha (DJB/WIPA), Pangkal Pinang Depati Amir (PGK/WIPK) and Silangit (WIMN).

An economic slowdown in Indonesia, together with structural adjustments impacted the performance of Angkasa Pura II, with any positive elements achieved from non-aeronautical operations. Revenue in 2014 was IDR 4.871 trillion (USD 401 million), an increase of 15.8 percent over 2013, with net profit of IDR 1.098 trillion (USD 80.3 million), an increase of 6.4 percent. Total assets amount to IDR 15.308 trillion (USD 1.12 billion). The airports under its management accounted for 85,131,033 passengers, a reduction of 1.4 percent, with 81.3 percent domestic and 18.3 percent international passengers. Cargo at 763,507 tonnes was 0.3 percent lower, with 56.81 percent domestic. Aircraft movements at 630,584 were down by 2.6 percent, 81.16 percent generated by domestic flights.

Contact

Budi Karya Sumadi
 President Director
 PT Angkasa Pura II
 Tel: +62 21 500 138
 Email: contact.center@angkasapura2.co.id
 Web: www.angkasapura2.co.id

INDONESIA'S BUSIEST AIRPORTS IN 2014, PASSENGERS IN MILLIONS (PERCENTAGE GROWTH OR DECLINE OVER 2013)

Rank	City/Airport/IATA/ICAO code	Province	Passengers	Growth
1	Jakarta Soekarno-Hatta (CGK/WIII)	Banten	57,005,406	-4.8%
2	Surabaya Juanda (SUB/WARR)	East Java	17,285,085	-2.0%
3	Denpasar Ngurah Rai (DPS/WADD)	Bali	17,271,415	+10.5%
4	Makassar Sultan Hasanuddin (UPG/WAAA)	S Sulawesi	8,848,354	-8.15%
5	Medan Kualanamu (KNO/WIMM)	N Sumatra	8,304,710*	—
6	Batam Hang Nadim (BTH/WIDD)	Riau Is	7,530,801*	—
7	Balikpapan Sultan Aji (BPN/WALL)	E Kalimantan	7,701,216	+7.05%
8	Yogyakarta Adisucipto (JOG/WARJ)	Yogyakarta SR	6,236,578	+8.0%
9	Banjarmasin Syamsuddin Noor (BDJ/WAOO)	S Kalimantan	3,888,993*	—
10	Semarang Achmad Yani (SRG/WARS)	Central Java	3,469,395	+5.3%

* 2013

Indonesia has another 15 airports that handled more than 1 million passengers in 2014.

Source: Angkasa Pura I and II