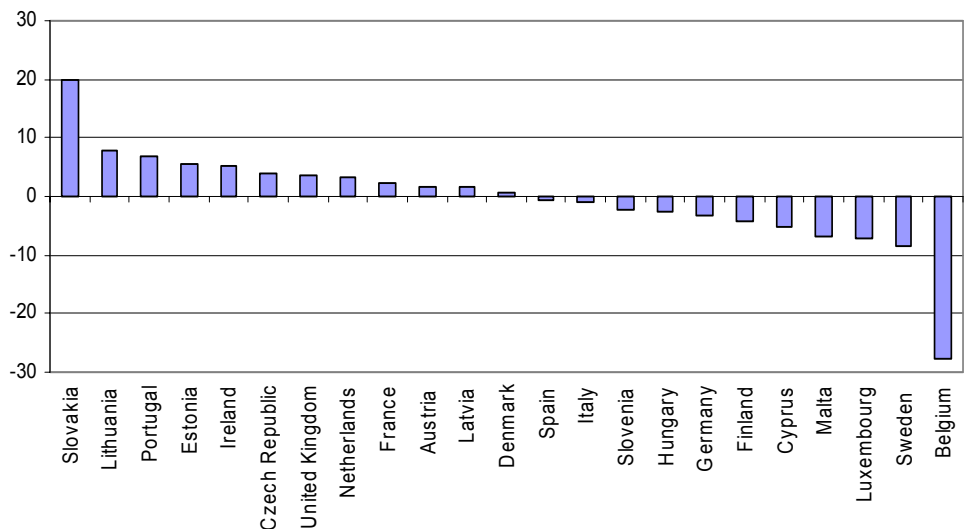


Passenger air transport 2001-2002

Further decline in most Member States, especially in international transport; routes to and from North America were particularly concerned

Graph 1: Evolution of the total passenger air transport by country: comparison between 2001 and 2002, in %



Statistics in focus

TRANSPORT

11/2004

Author
Luis de la Fuente Layos

Contents

| | |
|--|---|
| Highlights..... | 1 |
| General development in EU-25 .. | 2 |
| General development in EU-15. .. | 2 |
| National air transport in EU-15 .. | 3 |
| International intra-EU-15 transport..... | 4 |
| International extra-EU-15 Transport..... | 5 |
| Air transport in the candidate Countries..... | 6 |
| Air transport in Norway, Iceland and Switzerland..... | 6 |

Highlights

After the initial decline in the latter part of 2001 following the tragic events of September 11, the number of air transport passengers registered decreased further in the year 2002 in most of the countries for which data are available. At EU-15 level in 2002, the number of passengers recorded fell by 2.2% compared to the previous year. Domestic air transport was less affected than international transport.

At country level, the picture was mixed: the main decreases in total air transport passenger numbers were recorded in Belgium, Sweden, Luxembourg and Malta, whereas passenger volumes increased in Slovakia, Lithuania, Portugal, Estonia and Ireland.

London/Heathrow continues to be the most important airport by far in terms of total passenger volumes handled (63 million), followed by Paris/Charles-de-Gaulle, Frankfurt and Amsterdam. Among the new Member States, Prague/Ruzyne (rank 36 with 6.3 million passengers) Larnaca (42) and Budapest/Ferihegy (45) feature in the Top-50 EU airports.

In 2002, total extra-EU-15 passenger air transport declined by 3.6% compared to 2001, with routes to North America particularly affected.

For the candidate countries, figures suggest that after a long and difficult period, air transport passenger numbers in Bulgaria and Romania are increasing again. The large volume of passengers for Turkey (33.2 million passengers in 2002) reflects high levels of tourism.



General development in EU-25

Table 1 gives an overview of the evolution of passenger air transport in the individual Member States. Data for some EU Member States (and especially the new ones) are not always available. Nevertheless, it can be stated that with regards to the total passenger air transport, half of the Member States registered a decline between 2001 and 2002. Belgium registered a 28% decrease; total passenger figures of Luxembourg, Malta and Sweden dropped between 7 and 9%. The declines of other countries were limited to 5% or less.

Conversely, certain countries registered an increase in passenger volumes: this was especially the case for Slovakia (+20% - however due to an increasing number of airlines), Lithuania, Portugal, Estonia and Ireland.

All countries for which data are available for this period showed positive results for the 1997-2001 period. But even those countries that showed two-digit positive growth rates during this period (Spain, Finland) recorded falls when comparing 2002 with 2001.

Table 1 : Overview of the evolution of the total transport broken by destinations

| | Total transport | | | National | | | International | | |
|----------------|-------------------|------------------|-----------------------------|-------------------|------------------|-----------------------------|-------------------|------------------|-----------------------------|
| | Passengers | Evolution | Average | Passengers | Evolution | Average | Passengers | Evolution | Average |
| | (in 1000) 2002 | 2001/2002 (%) | evolution 1997- 2001 (%) | (in 1000) 2002 | 2001/2002 (%) | evolution 1997- 2001 (%) | (in 1000) 2002 | 2001/2002 (%) | evolution 1997- 2001 (%) |
| Belgium | 14 316 | - 27.7 | 5.6 | 1 | - 56.9 | 54.1 | 14 315 | - 27.7 | 5.6 |
| Czech Republic | 6 579 | 4.0 | : | 148 | : | : | 6 432 | : | : |
| Denmark | 19 930 | 0.7 | 4.5 | 1 684 | - 6.5 | - 9.7 | 18 246 | 1.4 | 6.6 |
| Germany | 114 383 | - 3.2 | 4.1 | 20 402 | - 2.5 | 2.8 | 93 981 | - 3.4 | 4.4 |
| Estonia | 603 | 5.6 | : | 13 | 209.1 | : | 590 | 4.1 | : |
| Greece | : | : | : | : | : | : | : | : | : |
| Spain | 112 254 | - 0.6 | 16.1 | 29 022 | - 2.2 | : | 83 232 | - 0.0 | 7.6 |
| France | 96 526 | 2.3 | 4.7 | 27 921 | - 2.2 | 1.8 | 68 605 | 4.2 | 6.0 |
| Ireland | 18 235 | 5.3 | 8.8 | 659 | - 2.3 | 10.8 | 17 576 | 5.6 | 8.7 |
| Italy | 65 228 | - 1.0 | 5.4 | 22 527 | 0.2 | 3.3 | 42 701 | - 1.6 | 6.6 |
| Cyprus | 6 205 | - 5.1 | : | : | : | : | : | : | : |
| Latvia | 633 | 1.6 | : | : | : | : | : | : | : |
| Lithuania | 701 | 7.8 | : | : | : | : | : | : | : |
| Luxembourg | 1 505 | - 7.0 | 3.3 | 0 | : | : | 1 505 | - 7.0 | 3.3 |
| Hungary | 4 469 | - 2.5 | : | : | : | : | 4 469 | - 2.5 | : |
| Malta | 2 640 | - 6.9 | : | 47 | : | : | 2 593 | - 8.6 | : |
| Netherlands | 40 828 | 3.1 | 5.6 | 204 | 9.6 | - 1.7 | 40 625 | 3.1 | 5.6 |
| Austria | 14 944 | 1.7 | 4.8 | 530 | - 5.2 | 6.9 | 14 414 | 2.0 | 4.7 |
| Poland | 6 542 | : | : | : | : | : | : | : | : |
| Portugal | 17 382 | 6.9 | 7.6 | 2 930 | - 0.2 | 11.9 | 14 451 | 8.5 | 6.7 |
| Slovenia | 866 | - 2.2 | : | : | : | : | : | : | : |
| Slovakia | 497 | 19.9 | : | 32 | 235.5 | : | 465 | 14.9 | : |
| Finland | 10 296 | - 4.4 | 13.7 | 2 766 | - 9.6 | : | 7 530 | - 2.3 | 4.6 |
| Sweden | 22 039 | - 8.6 | 5.3 | 7 445 | - 7.4 | 4.2 | 14 595 | - 9.2 | 5.9 |
| United Kingdom | 168 742 | 3.5 | : | 22 617 | 8.8 | : | 146 125 | 2.7 | 5.7 |

When looking at the breakdown of national and international transport, the same general development as in total transport can be observed with however some exceptions. In domestic transport, both Estonia and Slovakia reported extremely high increases. In the case of Slovakia, this is however due, as mentioned before, to an increasing number of airlines. Despite the impressive rates, it should be noted that the absolute values remain quite low. This also counts for the Netherlands (+9.6% between 2001 and 2002) and Belgium (-56.9%). With 22.6 million passengers in 2002, only the United Kingdom registered a noticeable increase in absolute numbers of domestic air passengers (close to 9% more than 2001).

When observing international air transport at country level, the volume of passengers fell considerably in Belgium (-27.7%), in Sweden (-9.2%), Malta (-8.6%) and Luxembourg (-7.0%) whereas clear positive developments were registered in Slovakia (+14.9%, but again partly due to an

increasing number of airlines) Estonia, France, Ireland and Portugal (between 4% and 9%).

In international passenger air transport too, the average annual growth rate between 1997 and 2001 was still highly positive, ranging from 3.3% (Luxembourg) to 8.7% (in Ireland). On the basis of available data, an EU-25 ranking of the busiest airports for the year 2002 could be established (Table 2). However, the ranking excludes Greek and Polish airports. London/Heathrow continues to be the most important airport in the EU with a total volume of 63 million passengers. Paris/Charles-de-Gaulle and Frankfurt am Main compete for second place with very similar figures (around 48 million passengers). Prague/Ruzyně (6.3 million passengers) is the first airport among the new Member States and holds position 36.

Table 2: Top 50 airports in EU-25 in terms of passengers in total transport.

| Rank | Country | Airport | Number of passengers | Rank | Country | Airport | Number of passengers |
|------|----------------|-------------------------|----------------------|------|----------------|--------------------------|----------------------|
| 1 | UNITED KINGDOM | LONDON/HEATHROW | 63 041 754 | 26 | SPAIN | TENERIFE SUR-REINA SOFIA | 8 805 312 |
| 2 | FRANCE | PARIS/CHARLES-DE-GAULLE | 48 257 964 | 27 | GERMANY | HAMBURG | 8 789 199 |
| 3 | GERMANY | FRANKFURT am MAIN | 48 078 824 | 28 | SPAIN | LAS PALMAS/GRAN CANARIA | 8 772 424 |
| 4 | NETHERLANDS | AMSTERDAM/SCHIPHOL | 40 587 562 | 29 | UNITED KINGDOM | BIRMINGHAM | 7 917 886 |
| 5 | SPAIN | MADRID/BARAJAS | 33 696 101 | 30 | ITALY | MILANO/LINATE | 7 793 660 |
| 6 | UNITED KINGDOM | LONDON/GATWICK | 29 509 921 | 31 | UNITED KINGDOM | GLASGOW | 7 767 289 |
| 7 | ITALY | ROMA/FIUMICINO | 24 204 778 | 32 | GERMANY | STUTTGART | 7 093 438 |
| 8 | FRANCE | PARIS/ORLY | 23 143 632 | 33 | SPAIN | ALICANTE | 6 971 884 |
| 9 | GERMANY | MUNCHEN | 22 877 714 | 34 | UNITED KINGDOM | EDINBURGH | 6 911 906 |
| 10 | SPAIN | BARCELONA | 21 164 324 | 35 | UNITED KINGDOM | LONDON LUTON | 6 473 565 |
| 11 | UNITED KINGDOM | MANCHESTER/INTL | 18 605 651 | 36 | CZECH REPUBLIC | PRAHA/RUZYNE | 6 290 946 |
| 12 | DENMARK | KOBENHAVN/KASTRUP | 18 189 580 | 37 | FRANCE | LYON/SATOLAS | 5 724 567 |
| 13 | SPAIN | PALMA DE MALLORCA | 17 758 972 | 38 | FRANCE | MARSEILLE/MARIGNANE | 5 360 548 |
| 14 | ITALY | MILANO/MALPENSA | 17 330 080 | 39 | GERMANY | KÖLN/BONN | 5 290 672 |
| 15 | SWEDEN | STOCKHOLM/ARLANDA | 16 636 815 | 40 | FRANCE | TOULOUSE/BLAGNAC | 5 288 497 |
| 16 | UNITED KINGDOM | LONDON/STANSTED | 16 044 864 | 41 | SPAIN | ARRECIFE/LANZAROTE | 4 947 149 |
| 17 | IRELAND | DUBLIN | 14 836 153 | 42 | CYPRUS | LARNACA | 4 695 986 |
| 18 | GERMANY | DÜSSELDORF | 14 588 642 | 43 | PORTUGAL | FARO | 4 635 662 |
| 19 | BELGIUM | BRUXELLES | 14 315 810 | 44 | GERMANY | HANNOVER | 4 581 284 |
| 20 | AUSTRIA | WIEN/SCHWECHAT | 11 911 246 | 45 | HUNGARY | BUDAPEST/FERIHEGY | 4 468 821 |
| 21 | SPAIN | MALAGA | 10 300 188 | 46 | ITALY | VENEZIA/TESSERA | 4 156 789 |
| 22 | GERMANY | BERLIN-TEGEL | 9 799 514 | 47 | ITALY | NAPOLI/CAPODICHINO | 4 141 053 |
| 23 | FINLAND | HELSINKI | 9 605 475 | 48 | ITALY | CATANIA/FONTANAROSSA | 4 060 551 |
| 24 | PORTUGAL | LISBOA | 9 269 848 | 49 | SPAIN | IBIZA | 4 042 271 |
| 25 | FRANCE | NICE/COTE D'AZUR | 9 183 115 | 50 | SWEDEN | GOTEBORG/LANDVETTER | 4 031 048 |

General development in EU-15

At the level of the EU before enlargement (EU-15), the overall decrease in air transport between 2001 and 2002 was of 2.2% (see Table 3). This stands in strong contrast with the average annual growth rate of 7.2% registered for the period 1997-2001. It should be noted that the EU-15 aggregates are based on data without those of Greece. Domestic air transport was far less touched by this decline than international air transport.

Limited to international air transport (both intra-EU-15 and extra EU-15), Graph 2 shows clearly how the passenger volumes by 'world region' have developed over time. A massive decrease occurred in the data for the second half of 2001 following the terrorist attacks of September 11th 2001.

International intra-EU-15 transport was less touched than the various extra-EU-15 'world regions'. Especially passenger volumes to and from North America have decreased.

Graph 2: EU-15: Development of international passenger air transport by world region between 1993 and 2002 - in million passengers

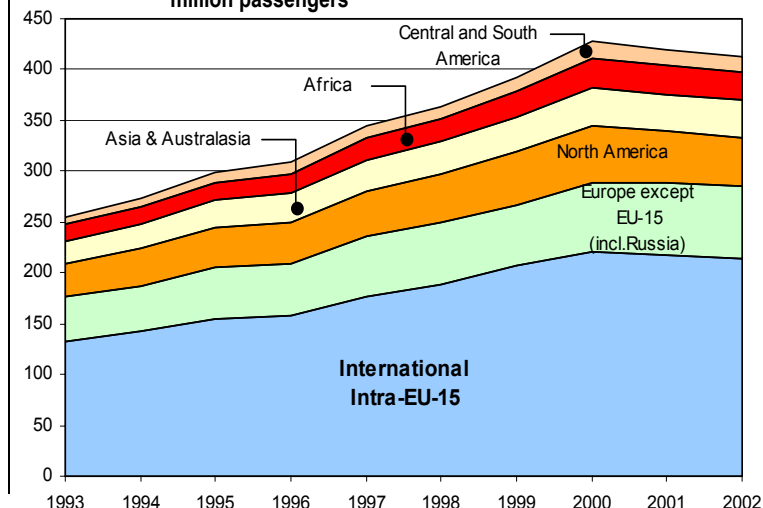


Table 3: Evolution of passenger air transport at EU-15 level

| | Total transport | | | National | | | International | | |
|----------------------|---------------------------|-------------------------|---------------------------------|---------------------------|-------------------------|---------------------------------|---------------------------|-------------------------|---------------------------------|
| | Passengers (in 1000) 2002 | Evolution 2001/2002 (%) | Average evolution 1997-2001 (%) | Passengers (in 1000) 2002 | Evolution 2001/2002 (%) | Average evolution 1997-2001 (%) | Passengers (in 1000) 2002 | Evolution 2001/2002 (%) | Average evolution 1997-2001 (%) |
| EU-15 ⁽¹⁾ | 551 565 | -2.2 | 7.2 | 138 707 | -0.7 | 15.8 | 412 858 | -2.7 | 5.0 |

¹ National and Extra-EU air transport of Greece is missing

National air transport in EU-15

Limited to EU-15, Table 4 details the volume of domestic air passengers in the various Member States. At EU-15 level in 2002, 0.7% less passengers were counted compared to the previous year. The highest growth rates were registered in the Netherlands (where in absolute terms, domestic air transport plays only a very limited role) and in the United Kingdom. The three Scandinavian countries display the largest decreases, ranging from 9.6% to 6.5%.

Obviously, the largest countries record the highest volumes: five countries feature more than 20 million domestic air passengers. The first is Spain (influenced by traffic to the Balearic and the Canary islands) with nearly 30 million domestic air passengers in 2002.

Table 4 : Total number of passengers in national transport for EU-15 countries

| Country | Number of passengers (1000), 2001 | Number of passengers (1000), 2002 | Evolution 2001-2002 (%) |
|----------------|-----------------------------------|-----------------------------------|-------------------------|
| EU-15 | 139 696 | 138 707 | -0.7% |
| BELGIUM | 3 | 1 | -56.9% |
| DENMARK | 1 800 | 1 684 | -6.5% |
| GERMANY | 20 920 | 20 402 | -2.5% |
| GREECE | : | : | : |
| SPAIN | 29 688 | 29 022 | -2.2% |
| FRANCE | 28 556 | 27 921 | -2.2% |
| IRELAND | 674 | 659 | -2.3% |
| ITALY | 22 487 | 22 527 | 0.2% |
| LUXEMBOURG | 0 | 0 | - |
| NETHERLANDS | 186 | 204 | 9.6% |
| AUSTRIA | 559 | 530 | -5.2% |
| PORTUGAL | 2 937 | 2 930 | -0.2% |
| FINLAND | 3 058 | 2 766 | -9.6% |
| SWEDEN | 8 039 | 7 445 | -7.4% |
| UNITED KINGDOM | 20 789 | 22 617 | 8.8% |

France recorded nearly 29 million passengers. Here, it should be noted that inter-continental relations with the French overseas territories (French Guyana, Martinique, Réunion and Guadeloupe) are considered as domestic transport.

Due to the countries' geographical characteristics and despite the previously mentioned decline in 2002, domestic air transport in Finland and Sweden remains relatively important.

Table 5 lists the 15 most important airports in the handling of passengers on domestic flights. Due to a noticeable decline at the airport of Paris/Orly in 2002, Madrid/Barajas is now first. Two more airports display domestic passenger volumes of over 10 million.

Table 5 : Top-15 airports in EU-15 in terms of number of passengers in national transport

| Rank 2002 | Airport | Number of passengers | Evolution 2001-2002 | Rank 2001 |
|-----------|-------------------------|----------------------|---------------------|-----------|
| 1 | MADRID/BARAJAS | 16 819 201 | -2.4% | 2 |
| 2 | PARIS/ORLY | 16 493 593 | -4.4% | 1 |
| 3 | ROMA/FIUMICINO | 11 947 607 | -1.7% | 3 |
| 4 | BARCELONA | 10 389 969 | -1.6% | 4 |
| 5 | MÜNCHEN | 8 133 635 | -1.1% | 5 |
| 6 | FRANKFURT - MAIN | 7 877 993 | -3.8% | 6 |
| 7 | LONDON/HEATHROW | 6 675 137 | 0.6% | 8 |
| 8 | STOCKHOLM/ARLANDA | 6 077 031 | -9.6% | 7 |
| 9 | MILANO/LINATE | 5 659 874 | 13.3% | 10 |
| 10 | BERLIN/TEGEL | 5 604 928 | 2.1% | 9 |
| 11 | EDINBURGH | 5 078 367 | 19.3% | 15 |
| 12 | PARIS/CHARLES-DE-GAULLE | 5 067 023 | 2.2% | 11 |
| 13 | PALMA DE MALLORCA | 4 687 336 | -3.2% | 12 |
| 14 | NICE/COTE D'AZUR | 4 408 660 | 2.3% | 14 |
| 15 | GLASGOW | 4 295 949 | 12.2% | 18 |

International intra-EU-15 transport

At EU-15 level, more than 213 million passengers were registered on international intra-EU-15 flights in 2002, a decline of 1.8% compared to the previous year and a sharp contrast to the average 6.3% yearly growth in the 1993-2001 period. It should be noted here that Greek data have been estimated on the basis of declarations from the partner airports (mirror-declarations).

Portugal and France have experienced an increase of their international intra-EU15 transport between 2001 and 2002, which is higher than the average evolution between 1993 and 2001 (respectively 9.9% and 6%).

Ireland, the United Kingdom, the Netherlands, Austria and Spain also registered an increase of the volume of passengers going or coming from an intra-EU15 destination.

The serious decrease registered in Belgium (-24.7%) is partly influenced by the bankruptcy of a major Belgian airline in the last quarter of 2001. Obviously, passenger air transport in 2002 was not able to recover sufficiently and to reach pre-2001 levels. However, the decrease mentioned for Belgium refers to Brussels airport only. If all Belgian airports had been taken into account (amongst them smaller airports chosen by so-called low-cost carriers) the overall decline would be less drastic. Sweden and Germany also experienced a noticeable decline of passenger volumes (respectively -7.0% and -5.6%).

Table 7 offers an insight on the most important city-pairs (both ways) in intra-EU air transport in 2002. City-pairs mean that if a city has more than one airport, passenger volumes have been aggregated.

Table 6 : Development of international intra-EU-15 transport between 1993 and 2002 in the European Union

| | Number of passengers in 2002 | Evolution 2001-2002 | Average evolution 1993-2001 |
|----------------|------------------------------|---------------------|-----------------------------|
| EU-15 | 213 186 642 | -1.8% | 6.3% |
| BELGIUM | 10 405 053 | -24.7% | 8.7% |
| DENMARK | 11 775 620 | -0.1% | 8.4% |
| GERMANY | 50 793 107 | -5.6% | 6.1% |
| GREECE * | 18 560 714 | -4.5% | 4.3% |
| SPAIN | 71 890 386 | 0.2% | 8.1% |
| FRANCE | 35 436 032 | 6.0% | 5.3% |
| IRELAND | 15 587 943 | 7.7% | 14.1% |
| ITALY | 29 464 505 | -1.6% | 8.7% |
| LUXEMBOURG | 1 318 611 | -6.9% | 8.0% |
| NETHERLANDS | 22 493 871 | 3.5% | 8.0% |
| AUSTRIA | 8 705 386 | 2.7% | 5.4% |
| PORTUGAL | 11 920 312 | 9.9% | 6.7% |
| FINLAND | 5 509 967 | -2.4% | : |
| SWEDEN | 11 176 126 | -7.0% | 14.2% |
| UNITED KINGDOM | 91 754 438 | 4.4% | 6.9% |

* estimated

Here it appears that the London-Dublin/Dublin-London relation remains by far the most important (close to 4.4 million passengers). Despite the general decline described earlier, most relations show an increase. Compared to 2001, the ranking shows some remarkable changes, mainly caused by a growth in volumes between London and various Spanish destinations: routes to and from Malaga, Barcelona and Alicante all show high growth rates and cause the major shifts in the Top-15 city-pairs.

Table 7 : Top-15 intra EU-15 city pairs, 2002

| Rank 02 | City Pair | | Number of passengers | Evolution 2001/2002 (%) | Rank 2001 |
|---------|------------|--------|----------------------|-------------------------|-----------|
| 1 | DUBLIN | LONDON | 4 389 799 | 4.4 | 1 |
| 2 | AMSTERDAM | LONDON | 3 614 934 | 2.6 | 2 |
| 3 | LONDON | PARIS | 2 898 847 | 7.3 | 3 |
| 4 | LONDON | MALAGA | 2 081 103 | 12.3 | 5 |
| 5 | FRANKFURT | LONDON | 2 045 007 | -1.8 | 4 |
| 6 | BARCELONA | LONDON | 1 696 157 | 11.9 | 10 |
| 7 | LONDON | MILANO | 1 654 680 | 3.0 | 9 |
| 8 | LONDON | MADRID | 1 652 946 | 0.5 | 8 |
| 9 | MADRID | PARIS | 1 633 689 | -7.8 | 6 |
| 10 | LONDON | ROMA | 1 623 948 | -3.6 | 7 |
| 11 | LONDON | PALMA | 1 468 915 | 1.6 | 11 |
| 12 | PARIS | ROMA | 1 348 870 | 7.2 | 13 |
| 13 | ALICANTE | LONDON | 1 271 231 | 18.9 | 25 |
| 14 | COPENHAGEN | LONDON | 1 242 300 | 2.3 | 14 |
| 15 | BRUXELLES | LONDON | 1 225 314 | 1.3 | 15 |

Still limited to international intra-EU-15 air transport, Table 8 lists the 25 most important airports with regards to passenger volumes handled in 2002. London/Heathrow and Amsterdam/Schiphol take the first two positions. Due to a 3.8% increase compared to the previous year, Amsterdam/Schiphol comes close to the number one airport. In line with the comments made with regards to Table 7, certain airports registered considerable increases (London/Stansted, Barcelona, Alicante, Malaga), influenced by the activity of low-cost air carriers. However, not all Spanish airports are touched by this development, as Palma de Mallorca, Tenerife and Las Palmas/Gran Canaria show a decline in passenger volumes.

Table 8 : Top-25 airports in terms of international intra-EU-15 total passengers carried in 2002

| Rank 2002 | Airport | Number of passengers | Evolution 2001-2002 | Rank 2001 |
|-----------|--------------------------|----------------------|---------------------|-----------|
| 1 | LONDON/HEATHROW | 23 330 783 | 1.2% | 1 |
| 2 | AMSTERDAM/SCHIPHOL | 22 340 949 | 3.8% | 2 |
| 3 | PARIS/CHARLES-DE-GAULLE | 19 796 859 | 0.9% | 3 |
| 4 | FRANKFURT/MAIN | 16 430 698 | -2.5% | 4 |
| 5 | LONDON/GATWICK | 15 019 285 | -0.6% | 5 |
| 6 | DUBLIN | 12 883 545 | 7.2% | 8 |
| 7 | LONDON/STANSTED | 12 755 094 | 18.3% | 10 |
| 8 | PALMA DE MALLORCA | 12 411 844 | -8.3% | 7 |
| 9 | MANCHESTER/INTL | 11 327 244 | -1.4% | 9 |
| 10 | KOBENHAVN/KASTRUP | 10 481 229 | 0.4% | 11 |
| 11 | MADRID/BARAJAS | 10 430 458 | 0.6% | 12 |
| 12 | BRUXELLES/NATIONAL | 10 405 053 | -24.7% | 6 |
| 13 | BARCELONA | 9 023 876 | 10.5% | 15 |
| 14 | MUNCHEN | 9 003 927 | -3.8% | 13 |
| 15 | STOCKHOLM/ARLANDA | 7 725 554 | -8.0% | 14 |
| 16 | MALAGA | 7 609 360 | 9.8% | 20 |
| 17 | ROMA/FIUMICINO | 7 469 125 | -0.8% | 17 |
| 18 | MILANO/MALPENSA | 7 172 791 | -5.9% | 16 |
| 19 | DÜSSELDORF | 7 038 507 | -5.6% | 18 |
| 20 | TENERIFE SUR-REINA SOFIA | 6 891 674 | -3.5% | 19 |
| 21 | WIEN/SCHWECHAT | 6 319 847 | 0.0% | 21 |
| 22 | BIRMINGHAM | 5 542 350 | 2.7% | 23 |
| 23 | ALICANTE | 5 248 389 | 11.1% | 26 |
| 24 | LAS PALMAS/GRAN CANARIA | 5 173 388 | -5.8% | 22 |
| 25 | LISBOA | 5 071 541 | 1.2% | 24 |

International extra-EU-15 transport

After an average annual growth rate of 6.7% for the period 1993-2001, total extra-EU 15 transport declined by 3.6% in 2002 compared to the previous year. European (other than EU-15), Far East and Australasian destinations have globally been less affected by this decline. Considering the absolute passenger volumes (47.6 million in 2002), the decrease on routes to and from North America is considerable (-5.4%). Central America and Caribbean and South America also show falls.

Table 10 outlines the share of each EU-15 Member State in total extra-EU-15 transport. All world destinations taken together, the United Kingdom and Germany constitute the main extra-EU-15 gateways: these countries are responsible for 27% and 22% respectively of all extra-EU-15 passengers counted in all the 15 EU Member States.

Particularities show at individual world region level: Germany has a large share in air transport to 'Europe except EU' (28.5%), the UK in traffic with 'America' and 'Asia and Australasia' (36.5% and 33.7% respectively) and France in relations to and from 'Africa' (38.4%).

Table 9 : Development of international extra-EU-15 transport between 1993 and 2002

| | Number of passengers, 2002 | Evolution 2001-2002 | Average evolution 1993-2001 |
|--------------------------------------|----------------------------|---------------------|-----------------------------|
| Total extra-EU-15 transport | 199 670 933 | -3.6% | 6.7% |
| Central and Eastern Europe | 16 189 219 | 7.3% | 10.4% |
| European Republics of the Ex-USSR | 7 160 428 | 6.1% | 8.0% |
| Other Europe | 48 787 537 | -1.7% | 5.5% |
| North America | 47 628 225 | -5.4% | 5.2% |
| Central America and Caribbean | 8 789 713 | -2.6% | 12.1% |
| South America | 5 954 790 | -2.3% | 7.4% |
| Near and Middle East | 10 740 002 | 0.3% | 4.9% |
| Asian Republics of the Ex-USSR | 811 476 | 9.9% | 14.1% |
| Indian Sub-Continent | 4 103 347 | -6.8% | 6.7% |
| Far East | 19 697 738 | 6.7% | 8.1% |
| Australasia, S. Sea Is. & Antarctica | 1 326 186 | 8.6% | -0.0% |
| North Africa | 17 845 016 | -6.1% | 7.1% |
| Central Africa | 598 744 | 7.7% | 3.7% |
| Southern Africa | 5 026 442 | 4.1% | 9.9% |
| West Africa | 3 481 313 | 6.3% | 8.0% |
| East Africa | 1 494 428 | 3.0% | 1.4% |

Table 10 : International extra-EU-15 air transport to world regions in 2002 : shares of individual Member States (%)

| | BE | DK | DE | EL | ES | FR | IE | IT | LU | NL | AT | PT | FI | SE | UK | EU-15 |
|-----------------------------|-----|-----|------|----|-----|------|-----|------|-----|------|-----|-----|-----|-----|------|-------|
| Total extra-EU-15 transport | 2.0 | 3.2 | 21.6 | : | 5.7 | 16.6 | 1.0 | 6.6 | 0.1 | 9.1 | 2.9 | 1.3 | 1.0 | 1.7 | 27.2 | 100 |
| Europe except EU-15 | 2.9 | 6.6 | 28.5 | : | 6.8 | 9.2 | 0.7 | 5.4 | 0.2 | 7.8 | 5.1 | 1.1 | 1.9 | 3.7 | 20.2 | 100 |
| America | 1.1 | 1.3 | 16.1 | : | 7.9 | 15.2 | 2.2 | 5.7 | 0.0 | 10.5 | 0.6 | 2.0 | 0.3 | 0.4 | 36.5 | 100 |
| Asia & Australasia | 0.4 | 2.2 | 22.1 | : | 1.4 | 16.6 | 0.0 | 6.9 | 0.0 | 11.3 | 3.2 | 0.0 | 1.1 | 1.1 | 33.7 | 100 |
| Africa | 3.5 | 0.4 | 15.7 | : | 3.5 | 38.4 | 0.3 | 11.5 | 0.2 | 6.3 | 1.5 | 1.8 | 0.2 | 0.4 | 16.3 | 100 |

Table 11 shows the 'world gateways' at EU-15 level. In 2002, 33 million passengers were registered in extra-EU-15 air transport at London/Heathrow, a 7.4% increase compared to 2001. Conversely, passengers bound on extra-EU-15 flights decreased by 15% at London/Gatwick. The airport of Frankfurt overtook Paris/Charles-de-Gaulle, but only by a small margin. Five airports display a volume of over 10 million passengers in extra-EU-15 transport.

Milano/Malpensa swapped places with Madrid/Barajas, as it recorded 7% less passengers in this category and passed from rank 6 in 2001 to rank 7 in 2002.

Table 11 : Top-10 airports in terms of international extra-EU-15 total passengers carried

| Rank 2002 | Airport | Number of passengers | Evolution 2001-2002 | Rank 2001 |
|-----------|-------------------------|----------------------|---------------------|-----------|
| 1 | LONDON/HEATHROW | 33 035 834 | 7.4% | 1 |
| 2 | FRANKFURT - MAIN | 23 770 133 | 2.6% | 3 |
| 3 | PARIS/CHARLES-DE-GAULLE | 23 394 082 | 0.2% | 2 |
| 4 | AMSTERDAM/SCHIPHOL | 18 077 254 | 2.5% | 4 |
| 5 | LONDON/GATWICK | 11 065 468 | -15.0% | 5 |
| 6 | MADRID/BARAJAS | 6 446 442 | 2.8% | 7 |
| 7 | MILANO/MALPENSA | 6 169 127 | -7.0% | 6 |
| 8 | KOBENHAVN/KASTRUP | 6 107 132 | 4.6% | 9 |
| 9 | MÜNCHEN | 5 740 152 | -1.5% | 10 |
| 10 | WIEN/SCHWECHAT | 5 076 920 | 3.6% | 11 |

Air transport in the candidate countries

The availability of air transport data for the then three candidate countries is limited.

In absolute terms, 33.2 million passengers were registered at Turkish reporting airports in 2002 (a 0.4% increase compared to 2001). This volume is equivalent to roughly half of the total passenger volume of Italian airports. It is certainly tourism that is responsible for this high figure.

Tourism to the Black Sea coast certainly has its share in Bulgaria's positive development in 2002 (+17.3% compared to 2001). However, the passenger volume in absolute terms (3.1 million) is low.

Romania's air transport is less important, despite the fact that the country is substantially larger than Bulgaria. After a

couple of difficult years, both national and international transport show signs of recovery.

Table 12: Overview of the evolution of the total transport broken by destinations for Bulgaria, Romania and Turkey

| | Total transport | | National | | International | |
|----|---------------------------|-------------------------|---------------------------|-------------------------|---------------------------|-------------------------|
| | Passengers (in 1000) 2002 | Evolution 2001/2002 (%) | Passengers (in 1000) 2002 | Evolution 2001/2002 (%) | Passengers (in 1000) 2002 | Evolution 2001/2002 (%) |
| BG | 3 083 | 17.3 | : | : | : | : |
| RO | 2 415 | 2.3 | 161 | 1.1 | 2 254 | 2.4 |
| TR | 33 188 | 0.4 | 8 337 | -13.4 | 24 851 | 6.0 |

Air transport in Norway, Iceland and Switzerland

The majority of the passengers registered at the various Norwegian airports were travelling on domestic flights (close to 11 million passengers out of a total of 18.6 million in 2002). This particularity can however be explained by the topography of the country and the long distances to cover. Very much like the other Scandinavian countries, both national and international air transport display a clear decline in 2002 as the passenger volumes dropped by 7.0% and 6.6% respectively.

The total passenger volume of Iceland was 1.9 million in 2002, a 8.3% decline compared to 2001. No other details can be presented, as Iceland reported only aggregated data.

The passenger volume handled by Swiss airports (except Basel/Bâle) during the year 2002 amounts to 25.4 million passengers, a serious drop compared to the previous year. This result should however be seen in the light of the

aftermath of the bankruptcy a major Swiss airline. Given the size of the country, but of considering its topography, domestic air transport is relatively important.

Table 13: Overview of the evolution of the total transport broken by destinations for Norway, Switzerland and Iceland

| | Total transport | | National | | International | |
|-----|---------------------------|-------------------------|---------------------------|-------------------------|---------------------------|-------------------------|
| | Passengers (in 1000) 2002 | Evolution 2001/2002 (%) | Passengers (in 1000) 2002 | Evolution 2001/2002 (%) | Passengers (in 1000) 2002 | Evolution 2001/2002 (%) |
| NO | 18 632 | -6.8 | 10 803 | -7.0 | 7 829 | -6.6 |
| CH* | 25 445 | -17.7 | 1 086 | -21.9 | 24 359 | -17.5 |
| IS | 1 917 | -8.3 | : | : | : | : |

* Without Basel (Bâle) airport.

➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

The figures presented in this publication have been extracted from the Eurostat aviation database, which contains international air transport data from 1993 (except for Poland that declared only very aggregated data).

The database is available online and on the annual Aviation CD-ROM.

Data for the Member States who joined the EU on 1 May 2004 are increasingly becoming available but have not yet reached the stage allowing a full integration alongside the older Member States. The situation is however expected to improve rapidly.

Definitions: On Flight Origin/Destination (OFOD) and Flight Stage (FS) Data - International Passengers

Regulation (EC) 1358/2003 implementing Regulation (EC) 437/2003 of the European Parliament and of the Council on statistical returns in respect of the carriage of passengers, freight and mail by air defines On Flight Origin and Destination traffic as traffic on a given flight with the same flight number subdivided by airport pairs in accordance with the point of embarkation and point of disembarkation on that flight. For passengers, freight or mail where the airport of embarkation is not known the aircraft origin should be deemed to be the point of embarkation; the same principle is used for the point of disembarkation. Since an individual passenger's air journey may consist of more than one flight, a passenger's on flight origin and destination is not necessarily his true origin and destination.

A flight stage is defined as the operation of an aircraft from take-off to its next landing. Flight stage passengers have been classified according to the flight stage flown.

The difference between On Flight Origin/Destination and Flight Stage data can be illustrated by the following example: a flight is operated on a route New York-London-Paris. The passenger traffic consists of 185 passengers travelling from New York to London, 135 from New York to Paris and 75 from London to Paris. Thus in terms of On Flight Origin/Destination data the figures recorded are 185 passengers New York-London, 135 passengers New York-Paris and 75 passengers London-Paris. New York would record the figures for New York-London and New York-Paris; London would record New York-London and London-Paris; Paris would record New York-Paris and London-Paris. In terms of Flight Stage data there are two flight stages and the figures recorded are; New York-London 320=(185+135) passengers; London-Paris 210=(135+75) passengers.

Passengers carried are defined as all passengers whose air journey begins or terminates at the reporting airport, plus connecting passengers who are counted twice at the reporting airport. Direct transit passengers are counted for Flight Stage data but not for On Flight Origin/Destination data. (In the previous example the 135 passengers in transit in London are recorded by London in terms of Flight Stage data but would not be recorded by London in terms of On Flight Origin/Destination data.)

Passengers: On Flight Origin/Destination and Flight Stage Data - Reporting Countries

In principle, information provided in this publication is based on On Flight Origin/Destination data rather than Flight Stage data. On Flight Origin/Destination data have been used where available, but Flight Stage data have been accepted for those countries where no On Flight Origin/Destination data were reported. Greece did not supply data for 2001 and 2002. Belgian data refer to Brussels airport only. Ireland provided data for Dublin, Shannon and Cork.

Important: mainly in long-haul extra-EU transport, passenger volumes declared according to the Flight Stage principle can be underestimated. Methodologically, this can't however be avoided.

World regions

The component countries comprising the five world regions (EU, Europe-except EU, America, Asia & Australasia, Africa) as defined for Table 10 relating to extra-EU air transport can be obtained upon request. The world regions of Asia and Australasia (including South Sea Islands and Antarctica) have been grouped together in the interest of clarity. The 'world regions' as defined in this publication corresponds to the geonomenclature used by Eurostat (OJ L335, 10.12.1998, page 22 – Commission Regulation (EC) 2645/98 on the nomenclature of countries and territories for the external trade statistics of the Community and statistics of trade between Member States).

Data from Sweden

Flight Stage data reported by Swedish authorities up to and including 1998 do not take into account direct transit passengers (see also last paragraph in On Flight Origin/Destination and Flight Stage Data definitions in the left column of this page). This has however only little influence on data related to Sweden and Swedish airports presented in this publication.

Estimates

For the countries having not declared On Flight Origin/Destination data or Flight Stage data for a specific year, estimates were made for departures by taking the corresponding arrival figures reported by other countries.

International Intra-EU-15 passenger transport

The basic figures used to calculate the percentages are departure figures or estimates thereof (in order to exclude double counting). For each pair of countries, the total of the two countries' departure figures is divided by the sum of the EU departure figures (actual and estimated) to obtain the percentages shown in the table.

International Extra-EU-15 passenger transport

In case of missing data for the calculation of the international extra-EU passenger transport of one country, estimates based on the linear regression method have been used. The international extra-EU figures contain the 'unknown' destinations.

This publication was prepared with the assistance of Mathieu Erzar (data) and Jelle Bosch (comments).

Further information:

➤ **Databases**

[EUROSTAT web site/Transport/Air transport](#)

Media Support Eurostat (for professional journalists only):

Bech Building Office A4/017 • L-2920 Luxembourg • Tel. (352) 4301 33408 • Fax (352) 4301 35349 •

E-mail: eurostat-mediasupport@cec.eu.int

European Statistical Data Support:

Eurostat set up with the members of the 'European statistical system' a network of support centres, which will exist in nearly all Member States as well as in some EFTA countries.

Their mission is to provide help and guidance to Internet users of European statistical data.

The complete details concerning this support network can be found on our Internet site:

http://epp.eurostat.cec.eu.int/pls/portal/url/PAGE/PGP_DS_SUPPORT

A list of worldwide sales outlets is available at the:

Office for Official Publications of the European Communities.

2, rue Mercier – L-2985 Luxembourg

URL: <http://publications.eu.int>

E-mail: info-info-opoce@cec.eu.int

BELGIEN/BELGIQUE/BELGIË - DANMARK - DEUTSCHLAND - EESTI – ELLÁDA - ESPAÑA - FRANCE - IRELAND - ITALIA - KYPROS/KIBRIS – LUXEMBOURG - MAGYARORSZÁG – MALTA - NEDERLAND - ÖSTERREICH - POLSKA - PORTUGAL - SLOVENIJA - SLOVENSKO - SUOMI/FINLAND - SVERIGE - UNITED KINGDOM - BALGARIJA - HRVATSKA - ÍSLAND – NORGE - SCHWEIZ/SUISSE/SVIZZERA - AUSTRALIA - BRASIL - CANADA - EGYPT - MALAYSIA - MÉXICO - SOUTH KOREA - SRI LANKA - T'AI-WAN - UNITED STATES OF AMERICA

ORIGINAL TEXT: English