

Air passenger transport in Europe in 2007

The total number of passengers transported by air to, from or within the EU-27 Member States in the year 2007 grew to 793 million. This represented a growth of 7.3% compared with 2006.

All Member States recorded increases in the number of air passengers and the strongest growth was once again observed in some of the Central and Eastern European states. The highest growth was recorded by Romania (41%).

All Candidate and EFTA countries reporting data for 2007 also showed an increase in the amount of passengers carried compared with 2006.

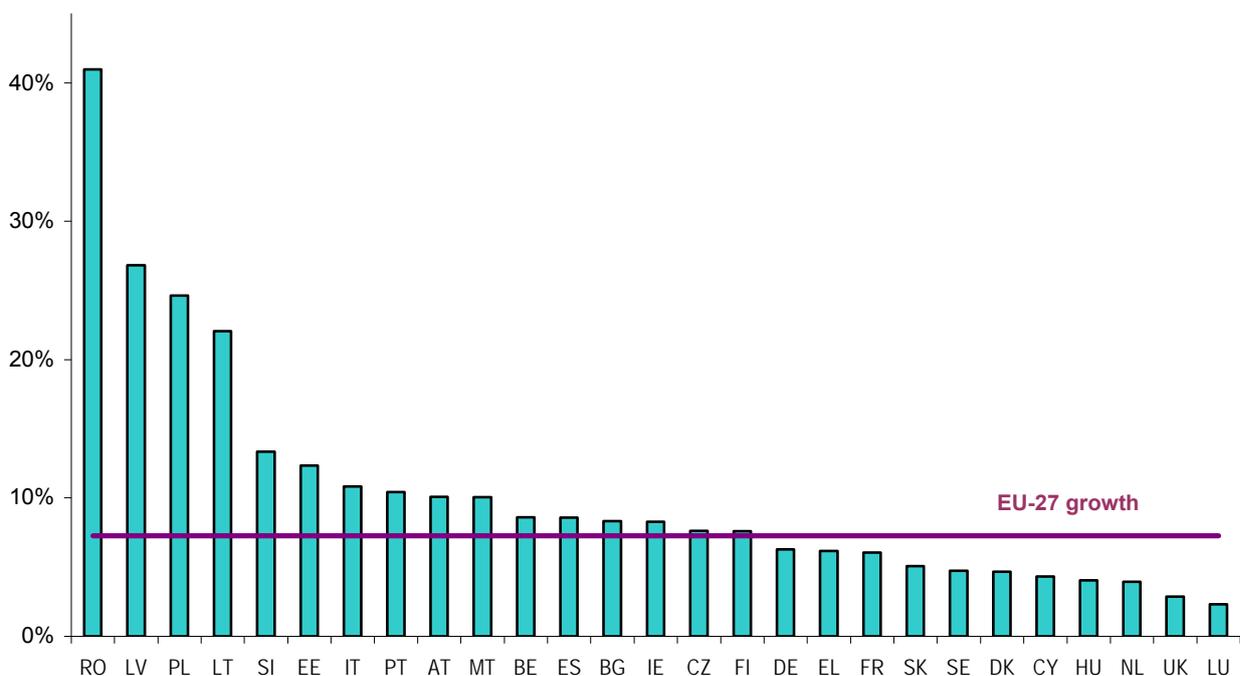
The top ranked airport in terms of passengers handled was London/Heathrow with 67.9 million passengers. Paris/Charles de Gaulle and Frankfurt/Main maintained second and third places respectively whilst Madrid/Barajas overtook Amsterdam/Schiphol in fourth position.

The individual route with the largest number of passengers remains that between Madrid/Barajas and Barcelona (more than 4.6 million passengers), followed by London/Heathrow and New York/JFK (2.8 million) and Roma/Fiumicino and Milano/Linate (2.5 million).

In brief

- 793 million air passengers were carried in 2007 at EU-27 airports
- Air passenger traffic grew by 7.3% between 2006 and 2007
- The busiest EU airport was London/Heathrow
- The busiest route was Madrid – Barcelona
- Romania reported the strongest annual growth
- The UK reported the highest national passenger figures.

Graph 1: 2006/2007 growth in total passenger air transport by Member State (in %)



Air transport at Member State and EU level

Graph 2 indicates the relative importance of the three main air passenger segments in 2007.

The largest share is on those routes carrying traffic between EU-27 Member States (Intra-EU). This is followed by air services between EU-27 Member States and countries outside the European Union (Extra-EU).

The smallest segment of the market is the national air services: routes that operate between two airports within the territory of an individual Member State.

Graph 2: Air passenger transport in EU-27: share by type of transport in 2007

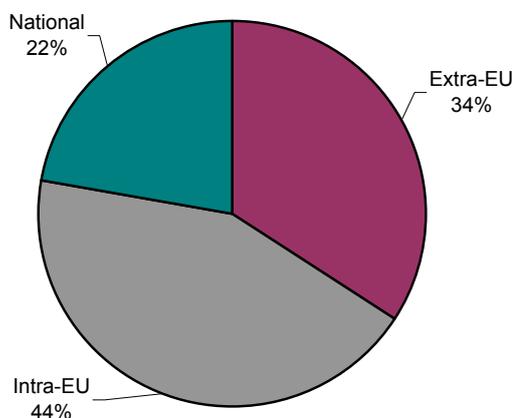


Table 1: Overview of EU-27 air passenger transport by Member States in 2007: passengers carried (in 1000)

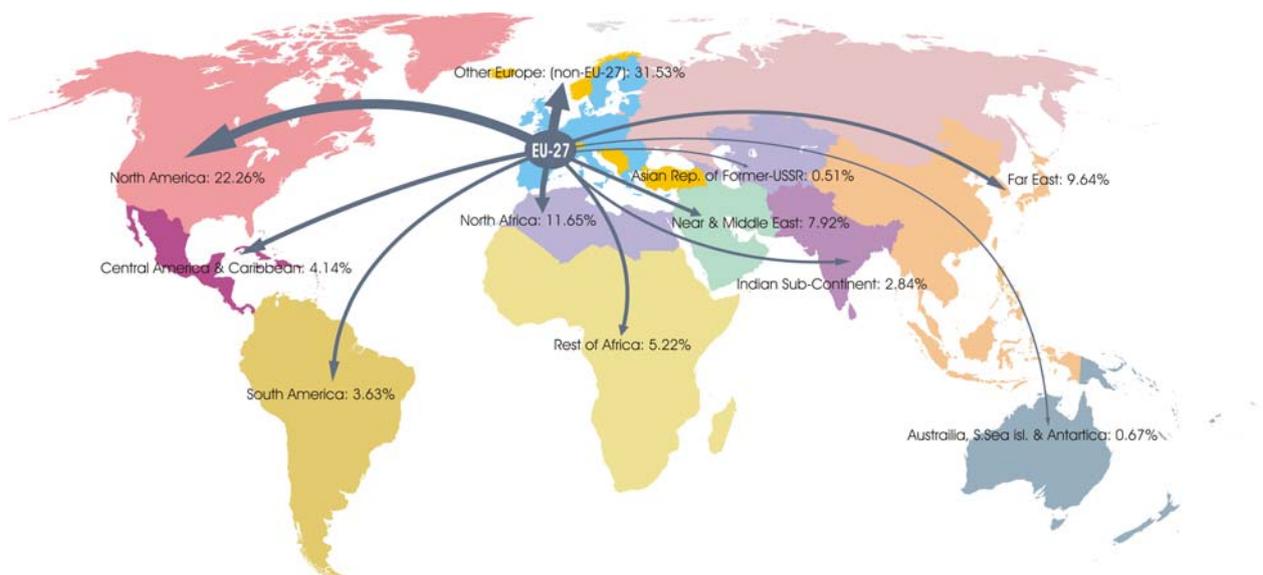
		Total transport		National transport		International intra-EU-27 transport		International extra-EU-27 transport	
		Passengers	Growth 2006-2007	Passengers	Growth 2006-2007	Passengers	Growth 2006-2007	Passengers	Growth 2006-2007
BELGIUM	BE	20 805	8.6%	60	0.8%	15 036	6.1%	5 710	16.0%
BULGARIA ¹	BG	6 071	8.3%	99	:	4 928	:	1 045	:
CZECH REPUBLIC	CZ	13 098	7.6%	268	2.7%	9 485	6.1%	3 345	12.7%
DENMARK	DK	24 042	4.7%	1951	8.9%	15 857	4.5%	6 233	4.0%
GERMANY	DE	163 844	6.3%	24 378	6.8%	85 635	4.6%	53 831	8.8%
ESTONIA	EE	1 723	12.4%	20	-5.7%	1 400	9.2%	303	31.3%
IRELAND ²	IE	29 840	8.3%	888	10.5%	25 712	7.6%	3 239	13.4%
GREECE	EL	34 786	6.2%	6 685	9.0%	23 775	4.5%	4 326	11.4%
SPAIN	ES	163 523	8.6%	44 171	9.4%	101 017	8.6%	18 335	6.4%
FRANCE	FR	120 034	6.1%	27 192	0.7%	50 968	8.5%	41 874	6.8%
ITALY	IT	106 294	10.8%	28 703	8.8%	58 386	11.5%	19 206	11.9%
CYPRUS	CY	7 004	4.3%	0.3	-50.7%	5 820	3.1%	1 184	11.0%
LATVIA	LV	3 156	26.8%	15	770.9%	2 418	19.8%	723	54.5%
LITHUANIA	LT	2 196	22.1%	0.4	-54.8%	1 783	18.4%	412	40.9%
LUXEMBOURG	LU	1 634	2.3%	0.1	-48.5%	1 340	-1.3%	294	23.1%
HUNGARY	HU	8 580	4.1%	0.2	-93.3%	6 520	2.6%	2 060	9.3%
MALTA	MT	2 971	10.1%	:	:	2 698	11.5%	273	-0.1%
NETHERLANDS	NL	50 501	3.9%	56	13.2%	30 006	4.1%	20 439	3.7%
AUSTRIA	AT	22 926	10.1%	666	7.8%	15 371	11.3%	6 889	7.7%
POLAND	PL	17 120	24.6%	1 087	15.9%	12 984	26.1%	3 049	21.7%
PORTUGAL	PT	24 324	10.4%	2 953	-1.9%	17 285	11.7%	4 087	15.3%
ROMANIA	RO	6 909	41.0%	544	40.5%	5 322	39.3%	1 043	50.8%
SLOVENIA	SI	1 504	13.3%	0.2	243.8%	941	7.5%	563	24.6%
SLOVAKIA	SK	2 232	5.1%	175	50.5%	1 759	-0.6%	298	25.2%
FINLAND	FI	14 465	7.6%	2 887	-1.7%	8 994	6.7%	2 583	24.2%
SWEDEN	SE	26 967	4.7%	6 893	-1.4%	15 939	6.7%	4 135	8.5%
UNITED KINGDOM	UK	217 288	2.9%	26 106	-1.7%	125 744	3.1%	65 439	4.4%
EU-25³		788 763	7.0%	175 154	5.0%	334 192	7.0%	279 416	8.3%
EU-27		792 636	7.3%	175 797	5.1%	345 919	7.6%	270 920	8.3%

⁽¹⁾ The growth 2006-2007 has been estimated using the airport aggregated declarations

⁽²⁾ Galway airport declarations for 2007 are not available

⁽³⁾ Intra and extra-EU aggregates have been calculated considering the EU25 configuration.

Map 1: Extra-EU-27 transport of passengers in 2007: share of world regions in extra-EU-27 transport



Map 1 analyses extra-EU-27 air passenger transport by world region. The European non-EU, North American and North African regions dominate the market, accounting for more than 65% of extra-EU-27 passenger traffic.

The most significant flow is that between airports within the EU-27 Member States and other European airports (mainly Norway, Switzerland and Turkey), accounting for almost one third of air passengers in this market.

The second largest region was North America (the USA and Canada) with 22.3% of the market and North Africa (mainly Morocco, Algeria, Tunisia and Egypt) with 11.7%.

One of the smallest flows corresponds to Australasia although care should be taken in drawing conclusions due to the fact that those passengers who either stop-over or change planes en-route will be allocated to the country in which they made their connections and not to the country of their first origin or final destination.

Table 3: International extra-EU passenger transport by world region in 2007

World regions	Passengers (in 1000)	Growth 2006-2007	Main EU-27 partner	
			Country	Share
Europe except EU	85 213	11.6%	GERMANY	26.1%
North America	60 153	5.7%	UNITED KINGDOM	37.3%
Central America and Caribbean	11 183	0.2%	UNITED KINGDOM	29.3%
South America	9 811	3.6%	SPAIN	38.0%
Asian Republics of the Former-USSR	1 380	12.0%	GERMANY	31.7%
Near and Middle East	21 418	13.7%	UNITED KINGDOM	32.1%
Indian Sub-Continent	7 665	6.4%	UNITED KINGDOM	49.0%
Far East	26 059	4.6%	GERMANY	24.4%
Australasia, S. Sea Is. & Antarctica	1 807	-3.4%	UNITED KINGDOM	86.0%
North Africa	31 487	13.4%	FRANCE	35.2%
Rest of Africa	14 095	6.2%	FRANCE	30.6%
Total Extra EU-27	270 920	8.3%	UNITED KINGDOM	24.2%

Table 3 presents the number of air passengers by world region. In 2007, 271 million passengers travelled on extra-EU air services, 8.3% more than in 2006.

The strongest growth was reported for the Near and Middle East region, with 13.7% more passengers than in 2006. This was followed by North Africa with 13.4% growth and Asian Republics of the Former USSR with 12.0% growth.

The main partner country for the extra-EU world regions was the United Kingdom with 24.2% of all air passengers in this market.

The United Kingdom was also the main partner country in five of the eleven world regions, compared with six regions in 2006. In 2007 Germany became the main partner country in the Far East region and was also the largest partner country for the Europe except EU-27 region and the Asian republics of the Former USSR.

Air transport at airport level

Table 4: Structure of European airports by size, on the basis of passenger transport, 2007

	Number of reporting airports*					The biggest airport
	Between 15 000 and 150 000 passengers	Between 150 000 and 1 500 000 passengers	Between 1 500 000 and 10 000 000 passengers	More than 10 000 000 passengers	Total	
BELGIUM	1	2	1	1	5	Brussels/National
BULGARIA	1	1	2	0	4	Sofia
CZECH REPUBLIC	1	2	0	1	4	Praha/Ruzyne
DENMARK	2	5	1	1	9	København/Kastrup
GERMANY	5	9	9	7	30	Frankfurt/Main
ESTONIA	0	0	1	0	1	Tallinn/Ülemiste
IRELAND	4	3	2	1	10	Dublin
GREECE	12	12	6	1	31	Athens
SPAIN	5	15	15	5	40	Madrid Barajas
FRANCE	17	28	10	3	58	Paris/Charles de Gaulle
ITALY	6	14	16	2	38	Roma/Fiumicino
CYPRUS	0	0	2	0	2	Larnaka
LATVIA	1	0	1	0	2	Riga
LITHUANIA	1	1	1	0	3	Vilnius
LUXEMBOURG	0	0	1	0	1	Luxembourg
HUNGARY	2	0	1	0	3	Budapest/Ferihegy
MALTA	0	0	1	0	1	Malta/Luqa
NETHERLANDS	2	2	0	1	5	Amsterdam/Schiphol
AUSTRIA	0	4	1	1	6	Wien/Schwechat
POLAND	0	6	4	0	10	Warszawa/Okęcie
PORTUGAL	3	3	3	1	10	Lisboa
ROMANIA	5	3	1	0	9	Bucuresti/Otopeni
SLOVENIA	0	0	1	0	1	Ljubljana Jože Pučnik
SLOVAKIA	2	1	1	0	4	Bratislava/Ivanka
FINLAND	13	7	0	1	21	Helsinki/Vantaa
SWEDEN	14	13	4	1	32	Stockholm/Arlanda
UNITED KINGDOM	14	12	16	4	46	London Heathrow
EU-27	111	143	101	31	386	London Heathrow
CROATIA	1	4	1	0	6	Zagreb
TURKEY	19	11	6	2	38	Istanbul/Ataturk
ICELAND	3	3	1	0	7	Keflavik
NORWAY	31	11	5	1	48	Oslo/Gardermoen
SWITZERLAND	2	1	1	2	6	Zurich

* Airports with more than 15 000 passengers handled in 2007, except for Galway (IE) and Keflavik (IS) airports which are based on 2006 data

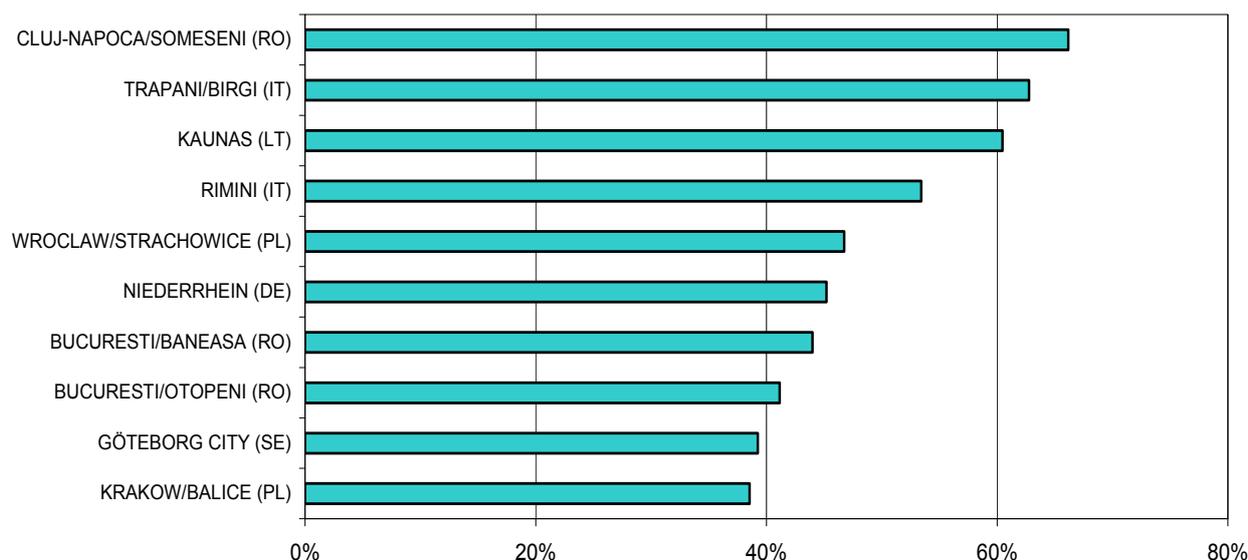
Table 4 presents the structure of European airports by the volume of passenger traffic handled in 2007 (those airports that have reported more than 15 000 passengers). The Member State with the largest number of such airports was France with 58, followed by the UK with 46 and Spain with 40.

In terms of large or very large airports (those handling more than 1.5 million passengers per annum) all Member States had at least one airport of this size. 2007 is the first year where this happened following the constant growth rates of air passenger transport recorded over the last years in the Central and Eastern European Member States.

Norway had the greatest number of small airports of all the countries in Table 4, linked to the particular topography and size of the country.

Graph 3 shows the top 10 airports in terms of growth in number of passengers. The majority of these airports were in the Central/Eastern European area and, in particular, three of them were in Romania. Although growth is strong, the absolute number of passengers remains relatively small.

Graph 3: Top 10 airports* in terms of growth between 2006 and 2007



*Airports with more than 150 000 passengers handled in 2007

Table 5: Top airports in the EU-27 in terms of total passengers handled in 2007

Rank	Country	Airport	Total air transport (in 1000 passengers)	of which			Growth of total air transport 2006-2007	Total number of flights (in 1000)	Growth of total number of flights 2006-2007
				National air transport	International intra-EU-27 air transport	International extra-EU-27 air transport			
1	UK	LONDON HEATHROW	67 852	5 753	24 216	37 883	0.8%	476	1.0%
2	FR	PARIS/CHARLES DE GAULLE	59 550	5 172	25 727	28 652	5.5%	569	1.7%
3	DE	FRANKFURT/MAIN	53 854	6 667	20 464	26 723	2.8%	485	0.8%
4	ES	MADRID/BARAJAS	51 208	22 576	17 479	11 153	13.6%	470	11.4%
5	NL	AMSTERDAM/SCHIPHOL	47 757	53	27 439	20 265	3.8%	444	3.3%
6	UK	LONDON GATWICK	35 166	4 023	18 741	12 401	3.2%	259	1.8%
7	DE	MUNCHEN	33 813	9 888	15 035	8 890	10.5%	408	5.1%
8	ES	BARCELONA	32 743	15 052	14 398	3 293	9.5%	339	8.5%
9	IT	ROMA/FIUMICINO	32 404	13 604	12 370	6 430	11.9%	333	7.9%
10	FR	PARIS/ORYLY	26 416	15 341	5 628	5 446	3.2%	238	1.5%
11	UK	LONDON STANSTED	23 759	2 554	19 614	1 591	0.3%	192	0.8%
12	IT	MILANO/MALPENSA	23 632	3 729	11 540	8 362	9.3%	258	6.8%
13	IE	DUBLIN	23 204	871	19 935	2 398	10.2%	201	9.6%
14	ES	PALMA DE MALLORCA	23 167	6 565	15 743	858	3.4%	185	5.1%
15	UK	MANCHESTER	21 891	3 229	12 412	6 250	-1.1%	206	-3.1%
16	DK	KØBENHAVN/KAstrup	21 293	1 850	13 637	5 806	2.9%	250	-0.5%
17	AT	WIEN/SCHWECHAT	18 719	650	11 747	6 322	11.4%	251	7.6%
18	SE	STOCKHOLM/ARLANDA	17 904	5 043	9 359	3 502	2.1%	205	-4.3%
19	DE	DUSSELDORF	17 780	4 261	8 651	4 869	7.7%	223	7.4%
20	BE	BRUXELLES/NATIONAL	17 745	2	12 258	5 486	6.9%	240	3.7%
21	EL	ATHENS	16 525	5 954	7 867	2 704	9.6%	193	7.3%
22	ES	MALAGA	13 569	3 484	9 472	612	4.1%	115	2.1%
23	PT	LISBOA	13 393	2 144	7 907	3 342	9.1%	142	7.6%
24	DE	BERLIN/TEGEL	13 331	6 584	4 997	1 749	13.3%	145	8.3%
25	FI	HELSINKI/VANTAA	13 145	2 876	7 745	2 523	8.3%	175	2.1%
26	DE	HAMBURG	12 689	5 366	5 039	2 285	6.9%	152	4.0%
27	CZ	PRAHA/RUZYNE	12 359	136	9 114	3 109	7.3%	164	5.5%
28	DE	KOLN/BONN	10 404	3 640	5 171	1 592	6.0%	138	-0.2%
29	FR	NICE/COTE D'AZUR	10 381	4 428	4 588	1 364	4.6%	174	5.0%
30	DE	STUTT GART	10 269	3 197	5 094	1 978	2.5%	139	0.9%
34	PL	WARSAWA/OKECIE	9 228	1 044	6 114	2 070	13.7%	148	3.5%
39	HU	BUDAPEST/FERIHEGY	8 580	0	6 520	2 060	4.1%	115	-2.1%
59	CY	LARNAKA	5 260	0	4 133	1 127	7.7%	52	4.3%
61	RO	BUCURESTI/OTOPENI	4 938	389	3 712	836	41.1%	:	:
82	LV	RIGA	3 156	15	2 418	723	26.8%	44	21.5%
85	MT	MALTA/LUQA	2 971	0	2 698	273	10.1%	28	2.2%
89	BG	SOFIA	2 723	92	2 308	323	:	37	:
107	SK	BRATISLAVA/IVANKA	1 976	174	1 550	251	3.7%	22	-7.2%
119	EE	TALLINN/ÜLEMISTE	1 723	20	1 400	303	12.4%	31	16.5%
120	LT	VILNIUS	1 714	0	1 307	406	18.5%	30	9.8%
125	LU	LUXEMBOURG	1 634	0	1 340	294	2.3%	51	0.0%
132	SI	LJUBLJANA JOŽE PUČNIK	1 504	0	941	563	13.3%	35	9.0%

Table 5 ranks the top 30 airports within the EU-27 Member States together with the most significant airport of Member States which do not appear in the top 30. London Heathrow remains the busiest airport in terms of passengers handled with 67.9 million. The second ranked airport is Paris/Charles De Gaulle with 59.6 million passengers followed by Frankfurt/Main with 53.9 million. Madrid/Barajas overtook Amsterdam/Schiphol to reach 4th place.

Amsterdam/Schiphol handled the greatest number of international intra-EU-27 passengers at 27.4 million whilst London Heathrow handled the largest number of international extra-EU-27 passengers, 37.9 million in 2007. Madrid/Barajas

was at the top in terms of national air passengers with 22.6 million.

The strongest growth among the top 30 airports was reported by Madrid/Barajas with 13.6%. Airports in the Central/Eastern European Member States continued to record strong growths. Bucuresti/Otopeni recorded a growth of 41.1%, Riga a growth of 26.8% and Vilnius 18.5%.

In the majority of cases the number of flights continued to grow less strongly than the corresponding number of air passengers suggesting either an increase in the seat occupancy of aircraft (the 'load factor') and/or the use of larger aircraft.

Airport to airport transport

Table 6: Top 20 airport pairs within the EU-27 in 2007

Rank	Airport pairs		Passengers carried (in 1000)	Growth 2006-2007	Number of flights (in 1000)	Growth 2006-2007
1	MADRID/BARAJAS	BARCELONA	4 627	4.2%	45.1	0.0%
2	ROMA/FIUMICINO	MILANO/LINATE	2 500	4.8%	26.6	0.7%
3	PARIS/ORLY	TOULOUSE BLAGNAC	2 328	-1.0%	18.7	-1.2%
4	PARIS/ORLY	NICE/COTE D'AZUR	2 312	-0.3%	17.2	-0.7%
5	DUBLIN	LONDON HEATHROW	1 974	-0.8%	14.1	1.9%
6	AMSTERDAM/SCHIPHOL	LONDON HEATHROW	1 799	-2.6%	17.3	1.3%
7	PARIS/CHARLES DE GAULLE	LONDON HEATHROW	1 790	-9.2%	16.1	-14.2%
8	PALMA DE MALLORCA	BARCELONA	1 785	2.6%	19.3	-1.6%
9	PALMA DE MALLORCA	MADRID/BARAJAS	1 758	0.0%	15.4	0.9%
10	MUNCHEN	HAMBURG	1 757	11.0%	17.0	5.4%
11	BERLIN/TEGEL	FRANKFURT/MAIN	1 648	6.9%	12.6	4.4%
12	MADRID/BARAJAS	LAS PALMAS/GRAN CANARIA	1 541	7.5%	11.3	8.7%
13	MUNCHEN	DUSSELDORF	1 529	12.2%	15.7	7.1%
14	ROMA/FIUMICINO	CATANIA/FONTANAROSSA	1 524	11.9%	14.7	12.7%
15	BERLIN/TEGEL	MUNCHEN	1 510	6.0%	14.7	1.2%
16	MALAGA	MADRID/BARAJAS	1 502	5.5%	12.9	4.1%
17	LONDON HEATHROW	FRANKFURT/MAIN	1 446	-4.2%	12.5	0.4%
18	EDINBURGH	LONDON HEATHROW	1 436	-3.9%	12.8	-1.7%
19	ROMA/FIUMICINO	PARIS/CHARLES DE GAULLE	1 345	6.1%	11.6	8.9%
20	HAMBURG	FRANKFURT/MAIN	1 297	0.6%	9.8	-1.8%

Table 6 lists the top 20 routes within the EU-27. Fifteen of the top 20 routes are national services. Madrid/Barajas – Barcelona is the most heavily used air route within the intra or extra EU markets. More than 4.6 million passengers were carried on this route.

The largest international intra-EU-27 route remains that between Dublin and London/Heathrow with 2.0 million passengers.

Five of the seven most heavily used routes within the EU-27 recorded a decline in the volume of passengers with Paris/Charles de Gaulle – London Heathrow recording the greatest decline (-9.2%). This may be due to the competition from Eurostar high speed rail services.

Table 7 presents the top 20 extra-EU-27 airport pairs in 2007. The London Heathrow – New

York/JFK route is the most heavily used route with more than 2.8 million passengers in 2007. This was followed by Paris/Charles de Gaulle – New York/JFK with 1.7 million passengers and London Heathrow – Chicago O'Hare with 1.6 million.

In comparison with 2006, the London Heathrow – Dubai International route moved up from 6th place to 4th place with more than 14% growth compared to 2006. Three of the extra-EU routes shown on Table 7 are intra-European ones linking Oslo/Gardermoen with Kobenhavn/Kastrup and Stockholm/Arlanda and London Heathrow with Zurich.

London Heathrow is a partner airport on 14 of the top 20 routes whilst partner airports in North America feature on 9 of these top routes.

Table 7: Top 20 extra-EU-27 airport pairs in 2007

Rank	Airport pairs	Passengers carried (in 1000)	Growth 2006-2007	Number of flights (in 1000)	Growth 2006-2007
1	LONDON HEATHROW NEW YORK/JFK	2 839	3.2%	13.5	1.7%
2	PARIS/CHARLES DE GAULLE NEW YORK/JFK	1 729	4.2%	9.6	4.5%
3	LONDON HEATHROW CHICAGO/O'HARE INTL, IL.	1 605	5.5%	8.5	6.9%
4	LONDON HEATHROW DUBAI INTL	1 571	14.3%	7.2	1.5%
5	LONDON HEATHROW HONG KONG/INTL	1 453	2.6%	7.3	10.5%
6	LONDON HEATHROW LOS ANGELES INTERNATIONAL, CA.	1 406	-1.7%	6.1	-2.4%
7	KOBENHAVN/KASTRUP OSLO/GARDERMOEN	1 324	4.5%	12.9	-0.5%
8	LONDON HEATHROW SINGAPORE/CHANGI	1 075	-1.1%	5.1	-1.2%
9	PARIS/CHARLES DE GAULLE MONTREAL/P.E. TRUDEAU INTL	1 057	8.2%	3.9	1.0%
10	LONDON HEATHROW WASHINGTON DULLES INTL, DC.	1 055	1.4%	5.4	5.5%
11	STOCKHOLM/ARLANDA OSLO/GARDERMOEN	1 047	2.8%	10.4	-4.4%
12	LONDON HEATHROW SAN FRANCISCO/INTL,CA.	1 032	0.4%	3.6	0.0%
13	LONDON HEATHROW TORONTO/LESTER B. PEARSON INTL, ONT.	1 024	-2.1%	4.9	-2.9%
14	LONDON HEATHROW MUMBAI/CHHATRAPATI SHIVAJI INTL.	1 006	-0.1%	4.6	0.7%
15	LONDON HEATHROW JOHANNESBURG INTL AIRPORT	1 003	0.6%	3.6	1.1%
16	MADRID/BARAJAS EZEIZA MINISTRO PISTARINI, BUENOS AIRES	992	2.8%	3.2	9.3%
17	PARIS/CHARLES DE GAULLE TOKYO INTL	972	1.7%	4.6	0.1%
18	LONDON HEATHROW ZURICH	910	-2.9%	8.5	0.0%
19	LONDON HEATHROW BOSTON/LOGAN INTL	889	-4.6%	4.3	-0.7%
20	LONDON HEATHROW NARITA INTL	886	-3.2%	3.7	-0.6%

Graph 4 highlights those routes with more than 100,000 passengers in 2007 which showed the greatest growth.

For those routes within the EU-27 Member States, statistics are derived from the departure declarations of each airport of the route concerned.

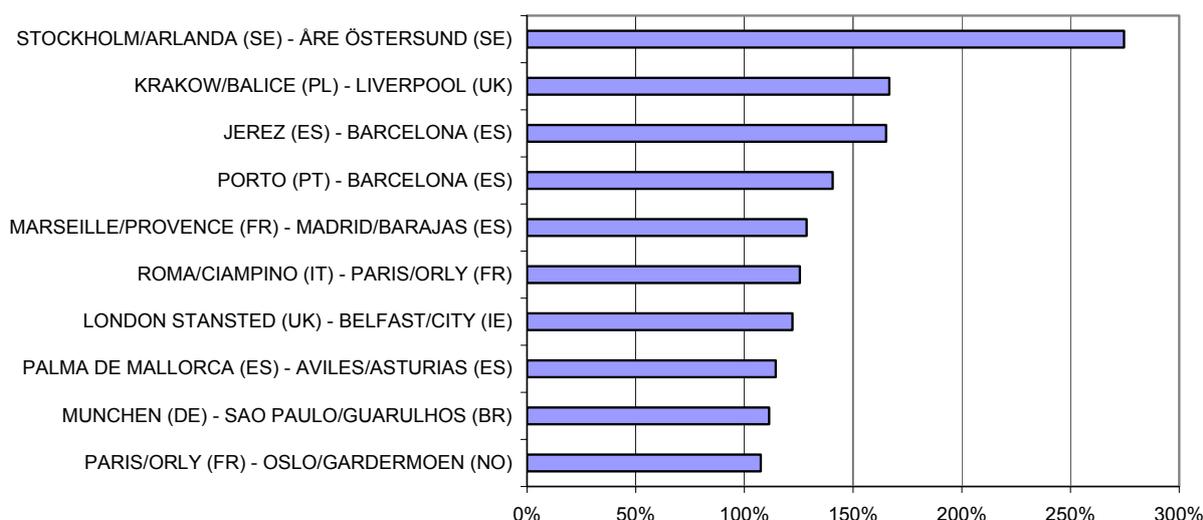
The route with the highest level of growth was a Swedish national one: Stockholm/Arlanda – Åre Östersund with a 275% increase. The second was Krakov/Balice – Liverpool followed by another national route, Jerez – Barcelona, in Spain. Four of the top ten routes were associated with a Spanish airport.

Significant growth may be due to the introduction of new air services or an increasing frequency in existing ones.

Growth may also indicate a transfer of air services between airports within a city system such as London or Paris.

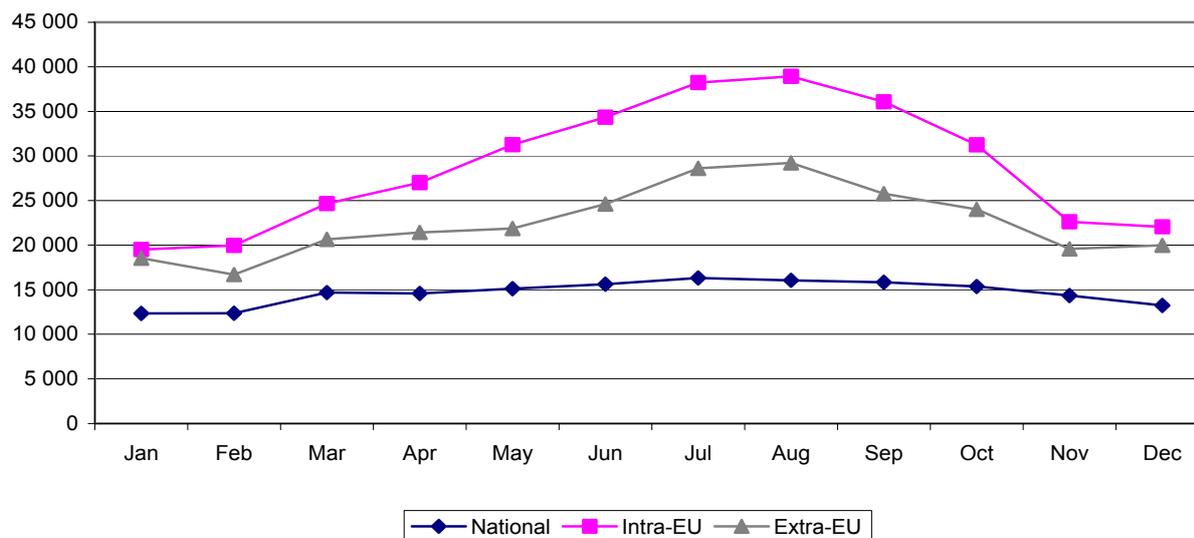
Markets such as that between Eastern Europe and the United Kingdom may experience growth due to travel by migrant workers to/from their home country. Finally, low-cost air carriers would also stimulate new demand.

Graph 4: Top-10 airport pairs in terms of growth between 2006 and 2007 (routes with more than 100 000 passengers in 2007)



Seasonality of air transport in the EU

Graph 5: Monthly EU-27 passenger transport by type of transport in 2007 (in 1000 passengers)



Graph 5 compares the monthly traffic flows between the national, the intra-EU and the extra-EU markets. It shows that similar trends may be observed on intra-EU and extra-EU routes. Both show a marked summer seasonal peak with the busiest months for travel being the months of July and August. The trend on the national segment is much more stable with small variations from March to November.

Intra-EU services show the greatest variance between peak and low months with August traffic flow being almost twice that of the low month of January. Within the extra-EU routes, the peak month was some 75% greater than the low month.

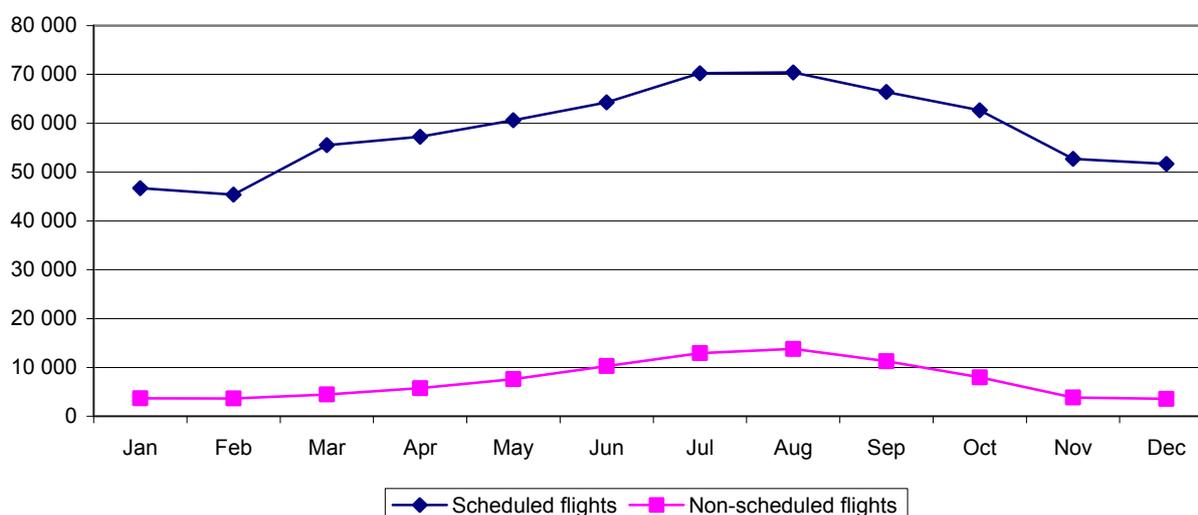
Within the extra-EU market both Australasia and the Indian Sub-Continent demonstrated different seasonal patterns with these being hidden by the

size of other flows within the group. In these markets the peak was reached in the winter months.

Graph 6 compares the relative size and seasonality of scheduled and non-scheduled air services. It shows that for both scheduled and non-scheduled services the peak months were July and August.

However, the seasonal difference of non-scheduled services (predominantly leisure traffic) is much greater. Passengers travelling in non-scheduled services in December (3.6 million) were 74% fewer than in the peak month of August (13.8 million). This contrasts with the scheduled services peak in August of 70.4 million air passengers and lowest point of February with 45.4 million passengers, 36% fewer than in the peak month.

Graph 6: Monthly EU-27 passenger transport by type of flight in 2007 (in 1000 passengers)



Air transport in the Candidate and EFTA countries

Table 8: Overview of air passenger transport in Candidate and EFTA countries in 2007

		National transport		International transport		Total transport		out of which to/from EU-27	
		Passengers carried (in 1000)	Growth 2006-2007	Passengers carried (in 1000)	Growth 2006-2007	Passengers carried (in 1000)	Growth 2006-2007	Passengers carried (in 1000)	Share on total transport of the country
CROATIA ⁽¹⁾	HR	:	:	:	:	4 895	11.2%	3 219 ⁽²⁾	65.8%
Former Yugoslav Republic of Macedonia	MK*	:	:	:	:	:	:	342 ⁽²⁾	:
TURKEY ⁽¹⁾	TR	31 949	11.0%	38 347	16.6%	70 297	14.0%	23 591 ⁽²⁾	33.6%
ICELAND ⁽¹⁾⁽³⁾	IS	:	:	:	:	1 000	9.0%	1 735 ⁽²⁾	:
NORWAY	NO	13 357	7.0%	13 029	12.6%	26 386	9.7%	12 323	46.7%
SWITZERLAND	CH	668	-5.1%	33 870	8.8%	34 538	8.5%	25 912	75.0%

⁽¹⁾ Total based on the sum of airport declarations

⁽²⁾ The volume of passengers carried to/from EU-27 is estimated on the basis of EU-27 declarations

⁽³⁾ Keflavik airport not included in the total transport figures

* Provisional code that does not affect the definite denomination of the country to be attributed after the conclusion of the negotiations currently taking place in the United Nations.

Table 8 presents air passenger transport in the Candidate and EFTA countries. Each of these states reported significant growth in 2007 when compared with 2006. In the case of Croatia, Turkey and Iceland, the figures are based on airport declarations and, therefore, the impact of double counted passengers on national transport is not eliminated.

Turkey recorded the strongest increase in total passengers in 2007, estimated at 14.0%. The only fall was recorded in Switzerland in the number of national air passengers, but it should be noted that the national market in Switzerland is relatively small.

Table 8 also shows the volume of air traffic between the Candidate and EFTA countries and

the EU-27 Member States as well as its relative importance in the market of the first group of countries. When not directly available, the data has been estimated using the mirror figures of the EU countries.

Table 9 examines the top three airports in each of the Candidate and EFTA countries. The largest airport in 2007 was Istanbul/Ataturk with 23.2 million passengers, followed by Zurich, with 20.7 million and Oslo/Gardermoen with 18.0 million. These three airports would be in the top 20 of all European airports reported in this publication.

The strongest growth was recorded by Antalya airport in Turkey (+21%) reflecting the increasing flows of holiday makers.

Table 9: Top 3 airports in Candidate and EFTA countries in 2007 (in 1000 passengers)

Major Airports	Passengers				Flights	
	National	International	Total	Growth 2006-2007	Total number (in 1000)	Growth 2006-2007
HR ZAGREB	:	:	1 973	15.1%	:	:
SPLIT/KASTELA	:	:	1 147	7.7%	:	:
DUBROVNIK/CILIP	:	:	1 124	2.4%	:	:
TR ISTANBUL/ATATURK	9 596	13 600	23 196	9.1%	243	7.9%
ANTALYA	2 550	15 160	17 710	21.0%	111	16.7%
IZMIR/ADNAN MENDERES	3 635	1 601	5 236	18.7%	47	18.3%
IS* REYKJAVIK	:	:	469	12.2%	82	12.2%
AKUREYRI	:	:	220	9.4%	20	9.4%
EGILSSTADIR	:	:	157	4.6%	56	4.6%
NO OSLO/GARDERMOEN	8 951	9 037	17 988	10.5%	226	4.4%
BERGEN/FLESLAND	3 330	1 068	4 398	7.4%	74	1.9%
TRONDHEIM/VAERNES	3 023	484	3 507	8.7%	49	2.5%
CH ZURICH	570	20 147	20 717	7.4%	224	1.6%
GENEVE	568	10 167	10 734	9.4%	128	8.8%
BASEL	21	3 339	3 361	11.5%	42	3.1%

*Keflavik airport not included

METHODOLOGICAL NOTES

Data sources

Unless otherwise indicated, all figures presented in this publication have been extracted from the Eurostat aviation database. The database is available online from the Eurostat web page.

Main Definitions

The definitions used on air transport statistics are included in the Commission 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. The main definitions are the following:

Flight stage (FS): The operation of an aircraft from take-off to its next landing. This is linked to the definition of passengers on board.

On Flight Origin and Destination (OFOD): Traffic on a commercial air service identified by a unique flight number subdivided by airport pairs in accordance with the point of embarkation and point of disembarkation on that flight. This is linked to the definition of passengers carried.

Passengers carried: All passengers on a particular flight counted once only and not repeatedly on each individual stage of that flight. This excludes direct transit passengers.

Direct transit passengers: Passengers who, after a short stop, continue their journey on the same aircraft on a flight having the same flight number as the flight on which they arrive.

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. Then:

- In terms of OFOD 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; and Paris would record New York-Paris and London-Paris.

- In terms of FS data, there are two flight stages and the figures recorded are; New York-London 320=(185+135) passengers; London-Paris 210=(135+75) passengers.

In principle, information provided in this publication is based on On Flight Origin/Destination data. FS data have been used for those countries where no OFOD data were reported. Only when neither OFOD nor FS data have been reported, airports declarations have been used.

Airport coverage

In principle, this publication covers the air transport in the airports of the Reporting Countries with more than 150 000 passengers carried in 2007. Only Table 4

provides more details about the number of smaller reporting airports.

Notes on some Reporting Countries

Bulgaria: For Graph 1 and Table 1, the 2006-2007 growth has been calculated on the basis of the airport aggregated declarations, as figures at airport routes level are not available in 2006.

Ireland: Galway airport declarations for 2007 were not available. However, national transport includes passengers handled at Galway as provided on the declarations of its Irish partner airports.

Luxembourg: Luxembourg only provided Flight Stage data.

Croatia: Croatia provided only airport declarations.

Turkey: Turkey provided only airport declarations. The breakdown between national and international transport included in Tables 8 and 9 has been provided ad hoc for these tables and is not available on the Eurostat web page.

Iceland: For Iceland, airport declarations have been used. Data for Keflavik airport were only available up to July 2007 and have not been used for this publication.

Former Yugoslav Republic of Macedonia: Data are not available for 2007.

National transport

The national aggregates have been calculated excluding double counting.

International intra-EU-25 and intra-EU-27 aggregates

The total intra-EU-25 and total intra-EU-27 aggregates have been calculated excluding double counting.

Table 2

The total figures for the countries flows have been calculated by adding the "Departures" declarations at city airport level of the two countries concerned.

Map 1 and Table 3

The component countries comprising the world regions as defined for Map 1 and Table 3 are based on the nomenclature used by Eurostat for the external trade statistics. The components of each world region can be extracted from the Aviation domain of the Eurostat on-line database or obtained upon request

Tables 6

The total figures for each pair of airports have been calculated by adding the "Departures" of the two airports concerned.

In this publication

":" means "not available"

This publication was prepared with the assistance of Mathieu Erzar (data) and Philip Osler (commentary).

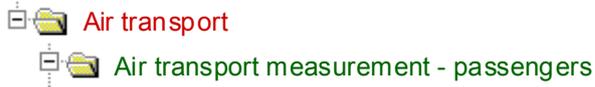
Further information

Data: [Eurostat Website: http://ec.europa.eu/eurostat](http://ec.europa.eu/eurostat)

Select your theme on the left side of the homepage and then 'Data' from the menu.

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