

TRANSPORT

Liabliabta

7/2006

Author

Luis DE LA FUENTE

LAYOS

Contents

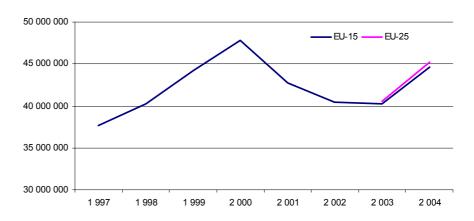
Thighing its	•
Passengers and passenger flights to/from the USA	. 2
Freight and mail	
loaded/unloaded to/from	
the USA	. 6



Manuscript completed on: 21.06.2006 Data extracted on: 30.03.2006 ISSN 1562-1324 Catalogue number: KS-NZ-06-007-EN-N © European Communities, 2006

Air transport between the EU and the USA

Graph 1: Evolution of total passenger transport to/from the USA



Highlights

In 2004 more than 45 million air passengers, travelling on 215 thousand flights, used air services between the EU-25 countries and the United States of America. This represents a growth of almost 12% over the previous calendar year. This traffic flow formed the largest single country extra-EU traffic flow and accounted for 20% of all air passengers entering or leaving the EU.

Despite strong growth experienced in 2004 the absolute number of passengers travelling between the EU-15 and the USA, the only set of data where a time-series is available, has not returned to the level of about 48 million recorded in 2000, the last full calendar year prior to the terrorist attack in New York.

Traffic growth in this market was recorded between 2003 and 2004 by all Member States for whom statistics are available. For those Member States with significant traffic flows, over 1 million passengers per annum, the strongest growth was recorded by Italy with an increase of almost 28% followed by Spain with almost 27% and Germany with 11%. The largest absolute increase in passenger volume was recorded by the United Kingdom with 1.4 million additional passengers travelling in 2004 compared to 2003.

11.5 million air passengers, more than one quarter of the EU - USA passengers, used London Heathrow in 2004. Seven of the top ten routes in this market operated to and from this airport.

The volume of air freight carried on these services was 2.4 million tonnes, forming more than 28% of all air freight and mail entering or leaving the EU. Tonnage on these services rose by 9% compared to the previous year. 755 thousand tonnes of freight and mail, more than 30% of the EU – USA market, were handled at UK airports.

Passengers and passenger flights to/from the USA

Table 1 presents a time-series of the number of air passengers travelling between the EU-25 and the United States of America. It shows that in 2004, more than 45 million passengers travelled on air services with an origin or destination in the USA. This represents an increase of almost 12% over the previous calendar year. However, despite the strong growth recorded in 2004 the absolute number of passengers travelling between the EU-15 and the USA, the only set of data where a time-series is available, reveal that traffic has not yet returned to the level of almost 48 million recorded in 2000, the last full calendar year prior to the

terrorist attack in New York (11/09/01). If growth continues at the same rate in 2005 the number of passengers will return to the pre 11/09/01 volumes. Looking now at the growth in individual markets, traffic increases between 2003 and 2004 were recorded by all Member States for whom statistics are available. For those Member States with significant traffic flows - over 1 million air passengers per annum - the strongest growth was recorded by Italy with an increase of almost 28% followed by Spain with 27% and Germany with 11%. Ireland, United Kingdom, Netherlands and France each reported growth of more than 8%.

Table 1: Total number of passengers carried to/from the USA (in 1000 passengers) – Evolution 1999-2004

	1999	2000	2001	2002	2003	2004	Average growth 1999-2004	Grow th 2003-2004	Share on total Extra-	Share on total air passenger transport
BELGIUM	1 440	1 528	1 210	531	541	675	-14.1%	24.8%	15.3%	3.9%
CZECH REPUBLIC	:	:	:	110	134	155	:	15.5%	6.0%	1.6%
DENMARK	:	:	499	671	680	713	:	4.8%	12.1%	3.4%
GERMANY	7 224	7 702	7 008	6 784	7 088	7 893	1.8%	11.3%	16.7%	5.8%
ESTONIA	:	:	:	0	0	0	:	:	0.0%	0.0%
GREECE	351	425	:	:	204	258	-6.0%	26.7%	8.0%	0.9%
SPAIN	1 774	1 626	1 406	1 259	1 246	1 587	-2.2%	27.3%	12.2%	1.2%
FRANCE	5 429	6 368	6 050	5 696	5 304	5 732	1.1%	8.1%	16.3%	5.6%
IRELAND	1 385	1 591	1 539	1 301	1 598	1 724	4.5%	7.9%	75.7%	8.3%
ITALY	2 394	3 023	2 536	2 116	1 972	2 518	1.0%	27.7%	16.3%	3.1%
CYPRUS	:	:	:	:	0	0	:	:	0.0%	0.0%
LATVIA	:	:	:	:	:	2	:	:	1.0%	0.2%
LITHUANIA	:	:	:	:	:	0	:	:	0.0%	0.0%
LUXEMBOURG	32	1	1	1	1	1	-54.2%	:	0.3%	0.0%
HUNGARY	:	:	74	74	69	77	:	11.0%	4.0%	1.2%
MALTA	:	:	:	0	0	0	:	:	0.0%	0.0%
NETHERLANDS	4 533	4 686	4 183	4 134	4 049	4 388	-0.6%	8.4%	22.9%	9.9%
AUSTRIA	328	367	342	291	286	320	-0.5%	11.6%	5.2%	1.7%
POLAND	:	:	:	:	:	320	:	:	21.9%	5.2%
PORTUGAL	411	649	364	352	326	348	-3.3%	6.7%	12.0%	1.9%
SLOVENIA	:	:	:	:	:	0	:	:	0.0%	0.0%
SLOVAKIA	:	:	:	:	:	0	:	:	0.0%	0.0%
FINLAND	223	184	153	156	152	166	-5.8%	9.5%	9.0%	1.4%
SWEDEN	444	464	362	246	262	309	-7.0%	17.9%	7.5%	1.4%
UNITED KINGDOM	18 252	19 208	17 060	16 879	16 586	18 005	-0.3%	8.6%	32.1%	9.4%
EU-15	44 221	47 821	42 712	40 418	40 295	44 637	0.2%	10.8%	18.4%	7.0%
EU-25	:	:	:	:	40 498	45 191	:	11.6%	20.0%	6.9%

The largest individual passenger volume was also observed on services to and from the United Kingdom which, at 18 million passengers, was more than twice the volume of the second largest traffic flow. This Member State also recorded the largest absolute increase in air passenger volume - 1.4 million additional passengers travelling in 2004 compared to 2003. The second largest market, Germany, recorded almost 8 million air passengers. The next three of the top five countries, France, the Netherlands and Italy recorded passenger volumes of 5.7 million, 4.4 million and 2.5 million respectively. These top five countries accounted for a total of 85% of EU – USA passenger traffic in 2004. This proportion is not significantly different from

1999, the first year in the series presented in Table 1. Indeed each of these countries has maintained its individual market share consistently since 1999. The effect of the cessation of services by Sabena had a noticeable effect on the Belgian share of the USA market. Traffic levels in 2002 were more than halved when compared to the previous year, and although there was strong growth in 2004, traffic remains at half of the peak recorded in 2000.

Table 1 also provides, for 2004, an analysis of the relative importance of the EU – USA passenger flow to the total volume of both passengers on Extra-EU air passenger services and to the passenger traffic handled by the EU 25 states on all air services.



Of the 650 million air passengers carried to or from and within the EU in 2004, 45 million were travelling on services to or from the USA. This represented almost 7% of all passenger traffic. The USA also formed the largest single country component of the Extra-EU passenger traffic flow, accounting for 20% of passengers.

Services to or from the USA account for more than three quarters of all Extra-EU services in Ireland (76%) and for almost one third in the United Kingdom (32%). This flow formed more than 20% of all Extra-EU air passengers for the Netherlands (23%) and Poland (22%).

In 2004 almost 215 000 passenger-carrying flights operated to or from the EU-25 states and the USA, 6% growth when compared to 2003 (Table 2).

For countries generating more than 10 000 flights in 2004, the largest growth was recorded by Italy (25%), followed by Germany (9%), Netherlands (7%) and United Kingdom (6%). France reported a fall of almost 9% in the number of flights. These countries accounted for 85% of flights between the EU-25 and the USA.

Of those countries reporting between 1 000 and 10 000 passenger flights in 2004 flights the Czech Republic recorded growth of more than one third (34%). Flights to and from Greece grew by one quarter (25%) whilst Portugal reported a fall of more than one tenth (11%).

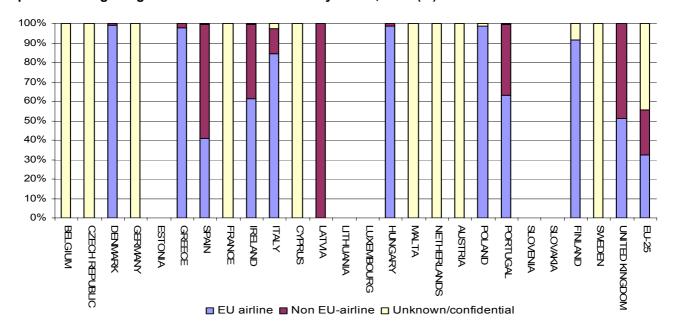
The growth in the number of flights (6%) was around half of the growth recorded in passengers carried (12%). This suggests that the proportion of seats filled has improved over 2003. Portugal and France reported a decrease in the number of flights (11% and 9% respectively) whilst passenger numbers (see Table 1) grew by 7% and 8% respectively.

Caution needs to be exercised when comparing passenger and flight statistics: a flight is allocated to the country of last take-off or first landing in Europe while passengers are recorded to the country of embarkation or disembarkation.

Table 2: Total number of passenger flights to/from the USA, 2003-2004

,			
	2003	2004	Grow th 2003-2004
BELGIUM	3 753	4 250	13.2%
CZECH REPUBLIC	792	1 064	34.3%
DENMARK	3 260	3 125	-4.1%
GERMANY	34 068	37 088	8.9%
ESTONIA	:	:	:
GREECE	1 098	1 378	25.5%
SPAIN	7 307	7 602	4.0%
FRANCE	32 161	29 433	-8.5%
IRELAND	6 920	7 530	8.8%
ITALY	10 902	13 570	24.5%
CYPRUS	133	6	-95.5%
LATVIA	:	37	:
LITHUANIA	:	:	:
LUXEMBOURG	:	:	:
HUNGARY	512	712	39.1%
MALTA	5	7	40.0%
NETHERLANDS	18 803	20 032	6.5%
AUSTRIA	1 341	1 412	5.3%
POLAND	:	1 612	:
PORTUGAL	2 171	1 936	-10.8%
SLOVENIA	:	0	:
SLOVAKIA	:	:	:
FINLAND	711	723	1.7%
SWEDEN	1 381	1 432	3.7%
UNITED KINGDOM	77 620	82 035	5.7%
EU-25	202 938	214 984	5.9%

Graph 2: Passenger flights to/from the USA: share by airline, 2004 (%)

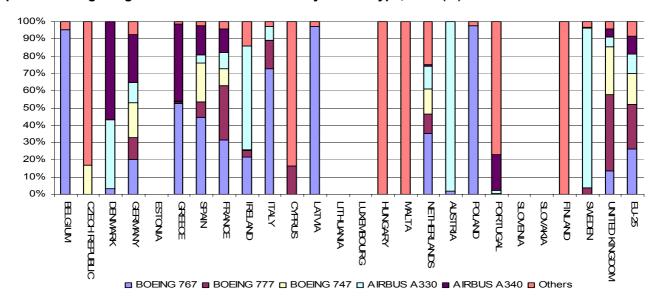




As shown in Graph 2, in the case of more than 40% of the passenger flights operated between the EU-25 and the USA the nationality of the air carrier was not identified. This situation has largely arisen from confidentiality constraints at Member States level. The overall picture currently available is that more than 30% of flights were operated by EU airlines, more than 20% by non-EU airlines with the remainder not being classified. It is, however, possible to look at some of the individual markets. For those Member States reporting more than 5 000 flights during 2004 airline share data is

available for the United Kingdom, Italy, Ireland and Spain. For the United Kingdom, there is an almost even split between EU and non-EU carriers. Flights by EU airlines predominated in Italy (more than 80%) and Ireland (more than 60%). For Spain the opposite situation was observed with non-EU airlines accounting for 60% of the flights performed. Care should be taken when drawing conclusions from Graph 2 both in terms of completeness and in respect of the cautions outlined in the commentary on Table2.

Graph 3: Passenger flights to/from the USA: share by aircraft type, 2004 (%)



Graph 3 shows the proportion of passenger flights operated between the EU-25 and the USA by the type of aircraft used. At EU level, Boeing aircraft dominate the picture on these services. Almost 70% of the 215 000 passenger carrying flights were operated by aircraft from this manufacturer. The most heavily used aircraft type in the market was the Boeing 767. This

aircraft accounted for more than 26% of the flights operated. It was followed by the Boeing 777 with over 25% and then the Boeing 747 with 18%. The Airbus A330 and Airbus A340 together accounted for a further 22% of flights with all other aircraft types used on less than 10% of flights.

Table 3: Top 10 airport pairs between the EU and the USA, 2003-2004 (in number of passengers carried)

Airport -pairs	2003	2004	Grow th 2003- 2004	Share in total EU-USA in 2004
LONDON/HEATHROW - NEW YORK/JOHN F. KENNEDY INTL, NY.	2 670 541	2 966 029	11.1%	6.6%
PARIS/CHARLES-DE-GAULLE - NEW YORK/JOHN F. KENNEDY INTL, NY.	1 347 619	1 575 688	16.9%	3.5%
LONDON/HEATHROW - CHICAGO/O'HARE, IL.	1 356 147	1 511 653	11.5%	3.3%
LONDON/HEATHROW - LOS ANGELES/INTL, CA.	1 180 047	1 345 967	14.1%	3.0%
LONDON/HEATHROW - WASHINGTON/DULLES INTL, DC.	1 017 964	1 080 493	6.1%	2.4%
LONDON/HEATHROW - SAN FRANCISCO/INTL,CA.	969 489	1 035 294	6.8%	2.3%
LONDON/HEATHROW - BOSTON/GRAL E.L.LOGAN INTL, MA.	923 602	927 521	0.4%	2.1%
LONDON/HEATHROW - MIAMI/INTL, FL.	735 750	876 173	19.1%	1.9%
FRANKFURT/MAIN - CHICAGO/O'HARE, IL.	753 541	816 233	8.3%	1.8%
LONDON/GATWICK - ORLANDO/INTL,FL.	765 445	779 499	1.8%	1.7%

Table 3 lists the largest ten air passenger flows between the EU-25 and the USA. These routes account for almost 30% of the whole market. Given the scale of the passenger market between the United Kingdom and the USA, it is not surprising that eight out of the top ten routes involve the United Kingdom. The other routes which feature in this table have origins or destinations in France and Germany. These Member States had the third and second largest contributions to the market respectively. The most heavily used route was between Heathrow and New York (JFK) with almost 3 million passengers in 2004. It was almost twice the size of the

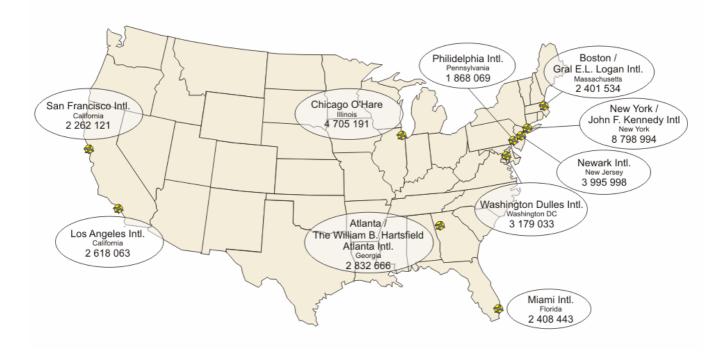


second largest route in the table (that between Paris (CDG) and New York (JFK)). It accounted for almost 7% of the entire EU-USA market. Air services between Paris (CDG) and New York (JFK), and Heathrow and Chicago, Los Angeles, Washington and San Francisco each recorded more than a million passengers during 2004.

The number of passengers using flights between London Heathrow and Miami increased by 19% compared to 2003. Strong growth was also recorded on the route between Paris Charles de Gaulle and New York (17%) and also on services between London

Heathrow and Los Angeles (14%). Only the service between London Heathrow and Boston and that between London Gatwick and Orlando recorded a growth of under 2%. It should not be inferred that the Member States reporting these services are either generating all the outbound traffic or are the recipient of all inbound traffic. The nature of those airports with hub operations of large air carriers, where significant volumes of passengers are using an airport in order to connect with another air service, suggest that the true air origin or destination for a proportion of these passengers will be in other EU states or beyond.

Map 1: Top 10 American partner airports of the EU, 2004 (in number of passengers carried)



Map 1 shows the number of air passengers carried between the EU-25 and the USA analysed by the top ten American partner airports in 2004. The picture is dominated by New York (John F Kennedy) with 8.8 million passengers, handling almost twice the volume of the next largest, Chicago, which handled 4.7 million passengers. If passenger traffic at the two New York Airports (John F Kennedy and Newark) is aggregated it amounts to almost 13 million passengers almost 30% of the market. The largest number of passengers after New York and Chicago was recorded at Washington

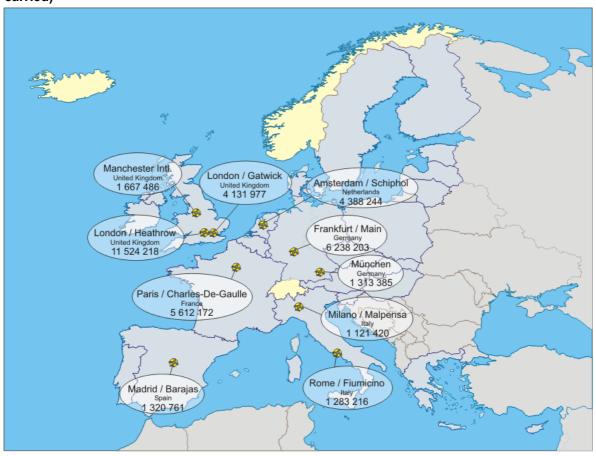
(3.2 million) followed by Atlanta (2.8 million), Los Angeles (2.6 million), Miami (2.4 million), Boston (2.4 million), San Francisco (2.3 million) and Philadelphia (1.9 million). There will be a significant element of connecting traffic at these airports. These are passengers who will change flights to travel to airports where there is no direct or convenient service to or from Europe or where connecting offers the best value for money. The data available do not allow connecting passengers to be distinguished from true point to point passengers.

Map 2 (on the next page) shows the number of air passengers carried between the EU-25 and the USA analysed by the top ten European airports in 2004. The largest airport is London (Heathrow) with 11.5 million passengers. If passengers at Heathrow and Gatwick airports are aggregated they account for more than 15 million passengers, more than one third of the market.

The next largest airport after London Heathrow is Frankfurt (6.2 million) followed by Paris Charles de Gaulle (5.6 million) and Amsterdam (4.4 million). All other airports in the top ten present passenger volumes over one million. Again there is a significant component of connecting traffic at these airports.



Map 2: Top 10 EU airports in terms of passengers carried to/from the USA, 2004 (in number of passengers carried)



Freight and mail loaded/unloaded to/from the USA

2.41 million tonnes of freight and mail were carried on air services between the EU-25 and the USA during the year 2004, a growth of more than 9% over the previous year. This traffic flow forms more than 28% of all air freight and mail carried on services between the EU-25 and the rest of the world and more than 22% of all air freight and mail reported by EU Member States. This is a particularly important market in Ireland, accounting for almost half of the air freight and mail volume reported by this Member State. The time-series for earlier years is not as complete as that for air passengers so it is difficult to draw conclusions about the evolution of the market. The available data suggests that volumes recovered more quickly than air passenger volumes following the events of September 11th 2001. The top five Member States with the largest volume of freight and mail traffic in 2004 (United Kingdom, Germany, France, Netherlands and Belgium) accounted for 85% of traffic in this market.

There is a directional imbalance, with 55% of the air freight being loaded and 45% being unloaded. This suggests that more exports are being carried by air than imports. Taking into account the likelihood of freight transiting European hubs, it is not possible to associate individual Member States' traffic flows with their own imports and exports.

Table 4: Total freight and mail loaded/unloaded to/from the USA, 2004 (in 1000 tonnes)

	Freight and mail unloaded	Freight and mail loaded	Freight and mail Total	Share on total Extra- EU	Share on total freight and mail transport	
BELGIUM	76	61	138	33.4%	20.8%	
CZECH REPUBLIC	1	1	2	7.7%	3.1%	
DENMARK	0	0	0	0.0%	0.0%	
GERMANY	231	297	528	25.7%	19.0%	
ESTONIA	0	0	0	0.0%	0.0%	
GREECE	3	3	6	20.1%	5.0%	
SPAIN	28	35	63	30.1%	12.2%	
FRANCE	150	185	335	31.1%	22.6%	
IRELAND	17	12	29	84.3%	47.6%	
ITALY	49	48	97	24.8%	12.4%	
CYPRUS	0	0	0	0.0%	0.0%	
LATVIA	0	0	0	0.0%	0.0%	
LITHUANIA	0	0	0	0.0%	0.0%	
LUXEMBOURG	38	71	108	19.7%	17.6%	
HUNGARY	1	1	2	6.4%	3.1%	
MALTA	0	0	0	0.0%	0.0%	
NETHERLANDS	115	165	280	19.4%	18.5%	
AUSTRIA	6	8	14	13.7%	8.8%	
POLAND	3	5	8	57.8%	26.1%	
PORTUGAL	3	3	6	16.4%	5.1%	
SLOVENIA	0	0	0	0.0%	0.0%	
SLOVAKIA	0	0	0	0.0%	0.0%	
FINLAND	3	5	8	15.5%	6.4%	
SWEDEN	10	20	30	41.5%	19.6%	
UNITED KINGDOM	357	399	755	40.1%	30.6%	
EU-15	1 087	1 312	2 399	28.2%	22.8%	
EU-25	1 092	1 319	2 410	28.5%	22.6%	

> ESSENTIAL INFORMATION - METHODOLOGICAL NOTES

Data sources

All figures presented in this publication have been extracted from the Eurostat aviation database. The database is available online from the Eurostat web page. Data for the Member States who joined the EU on 1 May 2004 are increasingly becoming available but are not generally available before 2003.

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 used are the following:

<u>Flight stage (FS)</u>. 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.

<u>Passengers on board</u>. All passengers on board the aircraft upon landing at the reporting airport or at taking-off from the reporting airport. This includes direct transit passengers.

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

<u>Direct transit passengers</u>. 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.

<u>Freight and mail loaded/unloaded</u>. All freight and mail loaded onto or unloaded from an aircraft (including express services and diplomatic bags, excludes passenger baggage and direct transit freight and mail).

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.

On Flight Origin/Destination and Flight Stage - Reporting Countries

In principle, information provided in this publication is based on On Flight Origin/Destination data rather than Flight Stage data. OFOD data have been used where available, but FS data have been used for those countries where no OFOD data were reported. For some new Member States having no reported neither OFOD nor FS data, airports declarations have been used.

1999 and 2000 data

Italy, Luxembourg, Austria and Sweden only provided Flight Stage data.

2001 data

Belgium, Denmark, Estonia, Luxembourg, Austria and Sweden only provided Flight Stage data.

2002 data

Denmark, Estonia, Luxembourg and Sweden only provided Flight Stage data.

2003 data

Denmark, Estonia, Ireland, Latvia, Luxembourg and Sweden only provided Flight Stage data.

Poland and Slovenia provided only airport delcarations.

2004 data

Luxembourg only provided Flight Stage data.

Due to derogations granted to several Swedish airports for the provision of OFOD declarations, the Swedish Flight Stage declarations have been used.

Belgium: Until 2003 data refer to Brussels airport only and 2004 data to Brussels and Charleroi.

Estonia: Estonian data refer to Tallinn/Ülemiste airport only.

Ireland: Because of derogations granted to other airports Irish data refer to Dublin, Shannon and Cork airports only.

Latvia: Latvian data refer to Riga airport only.

Lithuania: Lithuanian data refer to Vilnius Intl. airport only.

Hungary: Hugarian data refer to Budapest/Ferihegy airport only. **Luxembourg**: Luxembourgish data refer to Luxembourg airport

only.

Malta: Maltese data refer to Malta/Luqa airport only.

Poland: Because of derogations granted to other airports Polish

2004 data refer to Warszawa/Okecie airport only.

Slovenia: Slovenian data refer to Ljubljana airport only.

Slovakia: Slovakia provided data at country level.

EU aggregates

EU aggregates have been calculated for each year with the countries having data available.

Table 2

Figures are based on FS data except for Lithuania (only provided OFOD data).

Graph 2

Figures are based on FS data except for Lithuania (only provided OFOD data).

Belgium, Czech Republic, Germany, France, Cyprus, Luxembourg, The Netherlands, Austria, Slovenia, Slovakia and Sweden did not provide detailed information on the airline.

Graph 3

Figures based on FS data except for Lithuania (only provided OFOD data).

Estonia, Hungary and Slovakia did not provide detailed information on aircraft type.

This publication was prepared with the assistance of Marion Biré, Mathieu Erzar (data) and Philip Osler (comments).



Further information:

Databases: EUROSTAT Website/Home page/Transport/Data



 □
 ■

 Air transport

in a Air transport measurement - passengers

in Air transport measurement - freight and mail

ⓑ ⑥ Air transport measurement - traffic data by airports, aircrafts and airlines

Journalists can contact the media support service:

Bech Building Office A4/017 L - 2920 Luxembourg

Tel. (352) 4301 33408 Fax (352) 4301 35349

E-mail: eurostat-mediasupport@ec.europa.eu

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.

Contact details for this support network can be found on our Internet site: www.europa.eu.int/comm/eurostat/

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@ec.europa.eu