

## Economic crisis stops air transport growth

### Air transport in Europe in 2008

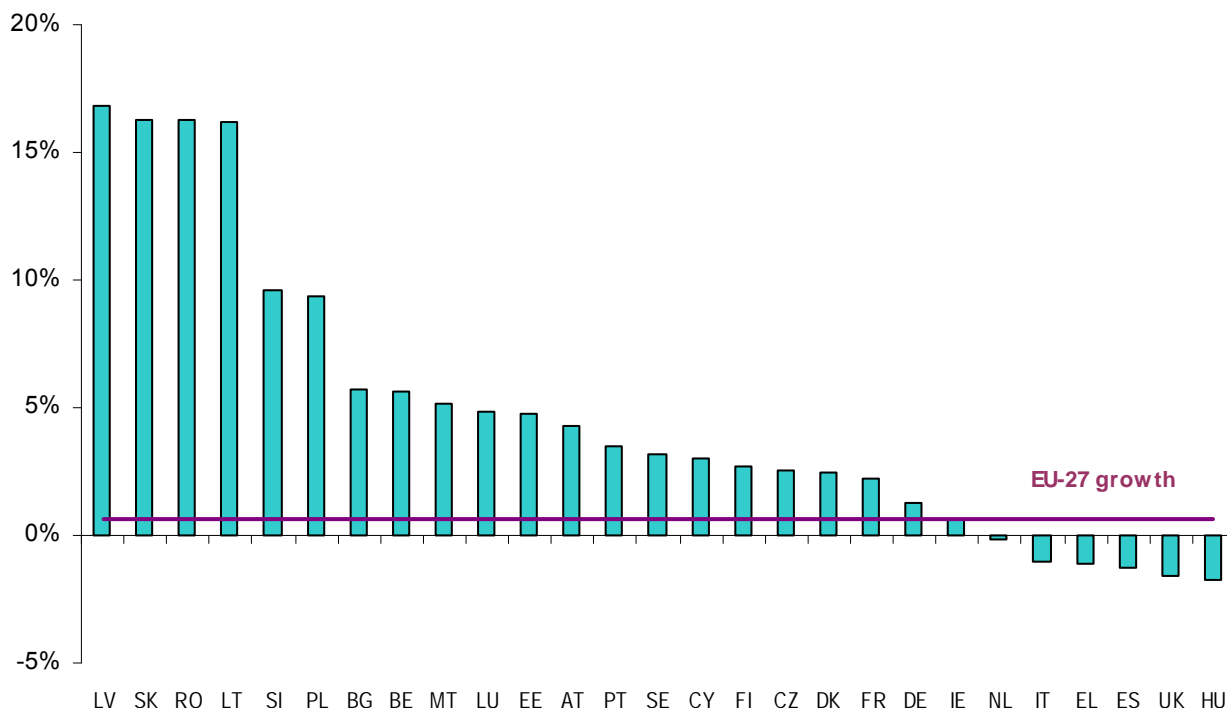
In 2008, 798 million passengers were transported by air to, from or within the EU-27. Although this represents a small annual growth of 0.6% compared to 2007, the effect of the economic crisis on the air transport industry of the EU-27 became apparent during the course of the year.

Indeed, while in the first two quarters of 2008, a comparison of air passengers with 2007 indicated a growth of 4.4%, by the last quarter, the data showed a fall of 5.6%. This brings to an end an uninterrupted period of six years of sustained growth in the air transport industry.

As regards air transport of freight and mail, the picture is similar. In 2008, 12.9 million tonnes were loaded or unloaded in the EU-27, an annual increase of 3.3%. However, there was a declining trend over the year that ended with a 14% decrease by the month of December.

At airport level, London Heathrow and Frankfurt/Main continued to be the largest airports in the EU-27 in terms of passengers carried and freight and mail loaded/unloaded respectively.

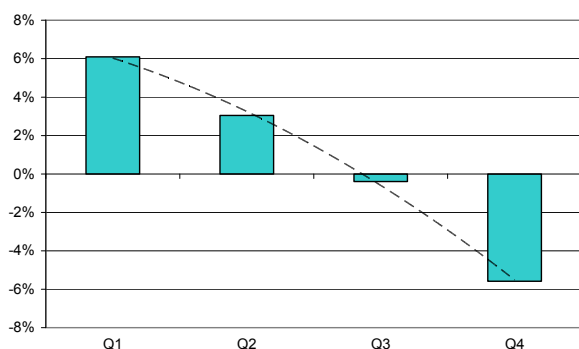
Graph 1: 2007/2008 growth in total air passenger transport by Member State (in %)



Source: Eurostat ([AVIA\\_PAOC](#))

## Air passenger transport at Member State and EU level

**Graph 2: EU-27 quarterly growth of air passenger transport between same quarters of 2007 and 2008**

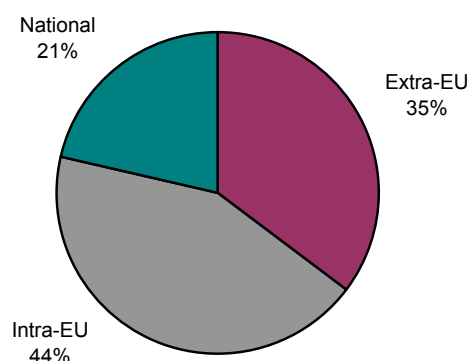


Source: Eurostat ([AVIA\\_PAOC](#))

Graph 2 shows the quarterly declining trend in air passenger transport in the EU-27. The impact of the economic crisis was greatest in November and December when a fall of 7% was recorded compared to the same months of 2007.

At Member State level the trend was similar in most instances. While in the first quarter of 2008, every Member State reported an increase in air

**Graph 3: Overview of EU-27 air passenger transport in 2008**



Source: Eurostat ([AVIA\\_PAOC](#))

passengers carried, by the fourth quarter, only four of them recorded a positive growth.

However, the annual growth for the EU-27 was still positive (0.6%). This represents a better performance than the air transport sector of the USA. In this country, the Bureau of Transportation Statistics of the US Department of Transportation has reported in 2008 a negative growth of 3.5% on scheduled domestic and international flights.

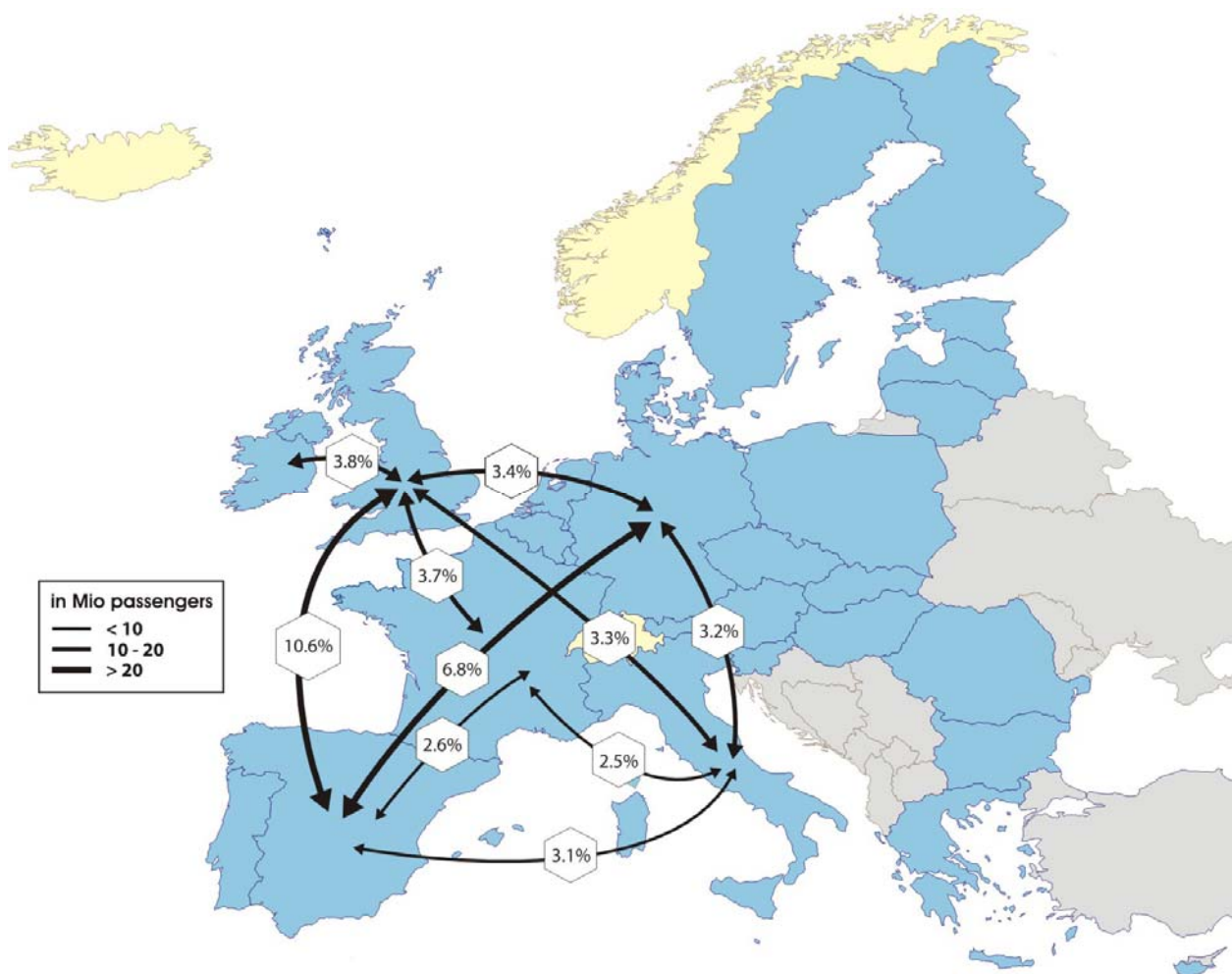
**Table 1: Overview of EU-27 air passenger transport by Member States in 2008: passengers carried (in 1000)**

|                |    | Total transport |                  | National transport |                  | International intra-EU-27 transport |                  | International extra-EU-27 transport |                  |
|----------------|----|-----------------|------------------|--------------------|------------------|-------------------------------------|------------------|-------------------------------------|------------------|
|                |    | Passengers      | Growth 2007-2008 | Passengers         | Growth 2007-2008 | Passengers                          | Growth 2007-2008 | Passengers                          | Growth 2007-2008 |
| BELGIUM        | BE | 21 982          | 5.7%             | 48                 | -20.0%           | 15 261                              | 1.5%             | 6 672                               | 16.9%            |
| BULGARIA       | BG | 6 418           | 5.7%             | 141                | 42.8%            | 5 040                               | 2.3%             | 1 237                               | 18.4%            |
| CZECH REPUBLIC | CZ | 13 429          | 2.5%             | 271                | 1.1%             | 9 626                               | 1.5%             | 3 532                               | 5.6%             |
| DENMARK        | DK | 24 629          | 2.4%             | 2 004              | 2.7%             | 15 998                              | 0.9%             | 6 627                               | 6.3%             |
| GERMANY        | DE | 166 095         | 1.2%             | 25 183             | 2.4%             | 85 418                              | -0.3%            | 55 494                              | 3.2%             |
| ESTONIA        | EE | 1 804           | 4.8%             | 21                 | 5.2%             | 1 445                               | 3.2%             | 339                                 | 11.8%            |
| IRELAND        | IE | 30 018          | 0.6%             | 845                | -4.8%            | 25 911                              | 0.8%             | 3 262                               | 0.7%             |
| GREECE         | EL | 34 404          | -1.1%            | 6 564              | -1.8%            | 23 180                              | -2.5%            | 4 660                               | 7.7%             |
| SPAIN          | ES | 161 401         | -1.3%            | 40 792             | -7.7%            | 100 568                             | -0.4%            | 20 041                              | 9.3%             |
| FRANCE         | FR | 122 724         | 2.2%             | 26 934             | -0.9%            | 52 100                              | 2.2%             | 43 690                              | 4.3%             |
| ITALY          | IT | 105 217         | -1.0%            | 28 338             | -1.3%            | 57 205                              | -2.0%            | 19 674                              | 2.4%             |
| CYPRUS         | CY | 7 218           | 3.1%             | -                  | -                | 5 928                               | 1.9%             | 1 290                               | 8.9%             |
| LATVIA         | LV | 3 687           | 16.8%            | 31                 | 111.2%           | 2 770                               | 14.6%            | 887                                 | 22.6%            |
| LITHUANIA      | LT | 2 552           | 16.2%            | 0.2                | -42.7%           | 2 045                               | 14.7%            | 507                                 | 23.0%            |
| LUXEMBOURG     | LU | 1 713           | 4.8%             | 0.3                | 152.1%           | 1 383                               | 3.2%             | 329                                 | 12.0%            |
| HUNGARY        | HU | 8 429           | -1.8%            | -                  | -                | 6 392                               | -2.0%            | 2 037                               | -1.1%            |
| MALTA          | MT | 3 125           | 5.2%             | -                  | -                | 2 849                               | 5.6%             | 276                                 | 1.1%             |
| NETHERLANDS    | NL | 50 419          | -0.2%            | 44                 | -21.9%           | 29 324                              | -2.3%            | 21 051                              | 3.0%             |
| AUSTRIA        | AT | 23 900          | 4.2%             | 702                | 5.3%             | 16 015                              | 4.2%             | 7 183                               | 4.3%             |
| POLAND         | PL | 18 727          | 9.4%             | 957                | -11.9%           | 13 836                              | 6.6%             | 3 934                               | 29.0%            |
| PORTUGAL       | PT | 25 180          | 3.5%             | 2 877              | -2.6%            | 17 816                              | 3.1%             | 4 488                               | 9.8%             |
| ROMANIA        | RO | 8 031           | 16.3%            | 671                | 23.3%            | 6 236                               | 17.2%            | 1 124                               | 7.8%             |
| SLOVENIA       | SI | 1 649           | 9.6%             | -                  | -                | 1 010                               | 7.3%             | 639                                 | 13.5%            |
| SLOVAKIA       | SK | 2 596           | 16.3%            | 193                | 10.0%            | 2 018                               | 14.7%            | 386                                 | 29.4%            |
| FINLAND        | FI | 14 851          | 2.7%             | 2 729              | -5.5%            | 9 152                               | 1.8%             | 2 970                               | 15.0%            |
| SWEDEN         | SE | 27 818          | 3.2%             | 6 741              | -2.2%            | 16 460                              | 3.3%             | 4 617                               | 11.6%            |
| UNITED KINGDOM | UK | 213 888         | -1.6%            | 24 889             | -4.7%            | 123 598                             | -1.7%            | 65 402                              | -0.1%            |
| <b>EU-27 *</b> |    | <b>798 325</b>  | <b>0.6%</b>      | <b>170 974</b>     | <b>-2.9%</b>     | <b>345 004</b>                      | <b>-0.5%</b>     | <b>282 347</b>                      | <b>4.2%</b>      |

\* Double counting is excluded in the intra-EU-27 and total EU-27 aggregates by taking into consideration only departure declarations.

Source: Eurostat ([AVIA\\_PAOC](#))

**Map 1: International intra-EU traffic at country level, 2008: 43% of the total traffic at a glance**



Source: Eurostat ([AVIA\\_PAOCC](#))

International intra-EU transport remains the largest of the three components of air transport in the EU-27 with a share of 44%. Map 1 shows the top 10 country-to-country flows that together account for 43% of total international intra-EU traffic.

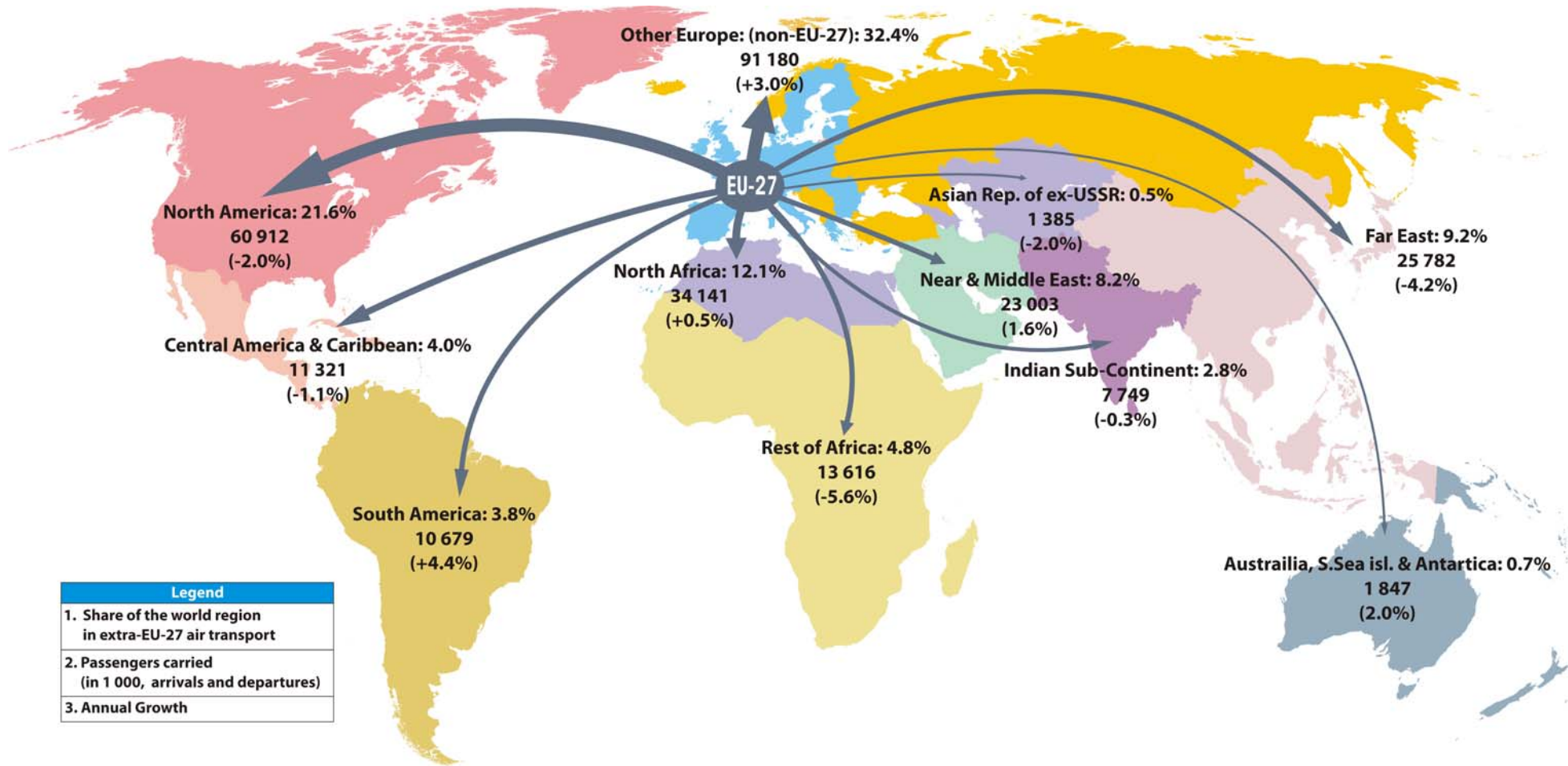
Four of the top ten flows featured Spain, with its significant leisure market, as one of the partner states. However, Spain was the Member State recording the greatest fall in air passenger traffic during the fourth quarter with almost 11% fewer passengers than during the same quarter of the previous year.

The extra-EU market was affected by the economic crisis less rapidly than the intra-EU

market. While the intra-EU market fell by 7% in the fourth quarter of 2008, the extra-EU market fell only 1% in the same period.

Map 2 presents an overall picture of the extra-EU market. Some care should be taken in drawing conclusions as regards the world regional shares 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.

Map 2: Extra-EU-27 transport of passengers in 2008



| Legend |  |
|--------|--|
| 1.     | Share of the world region in extra-EU-27 air transport |
| 2.     | Passengers carried (in 1 000, arrivals and departures) |
| 3.     | Annual Growth  |

Source: Eurostat ([AVIA PAOCC](#))

## Air passenger transport at airport and route level

**Table 2: Top airports in the EU-27 in terms of total passengers carried in 2008**

| Rank | Country | Airport                 | Total air transport (in 1000 passengers) | of which               |   |   | Growth of total air transport 2007-2008 | Total number of passenger flights (in 1000) | Growth of total number of flights 2007-2008 |
|------|---------|-------------------------|--|------------------------|---|---|---|---|---|
|      |         |                         |  | National air transport | International intra-EU-27 air transport | International extra-EU-27 air transport |   |   |   |
| 1    | UK      | LONDON/HEATHROW         | 66 907                                   | 5 563                  | 22 324                                  | 39 021                                  | -1,4%                                   | 470   | -0,5%                                       |
| 2    | FR      | PARIS/CHARLES DE GAULLE | 60 496                                   | 5 167                  | 25 720                                  | 29 608                                  | 1,6%                                    | 529   | 1,4%  |
| 3    | DE      | FRANKFURT/MAIN          | 53 189                                   | 6 362                  | 19 966                                  | 26 861                                  | -1,2%                                   | 452   | -1,4%                                       |
| 4    | ES      | MADRID/BARAJAS          | 50 366                                   | 20 551                 | 18 001                                  | 11 814                                  | -1,6%                                   | 448   | -2,2%                                       |
| 5    | NL      | AMSTERDAM/SCHIPHOL      | 47 404                                   | 43                     | 26 554                                  | 20 807                                  | -0,7%                                   | 419   | -1,7%                                       |
| 6    | IT      | ROMA/FIUMICINO          | 34 815                                   | 13 453                 | 12 985                                  | 8 377                                   | 7,4%                                    | 336   | 2,5%  |
| 7    | DE      | MÜNCHEN                 | 34 399                                   | 9 839                  | 15 337                                  | 9 223                                   | 1,7%                                    | 404   | 0,2%  |
| 8    | UK      | LONDON/GATWICK          | 34 162                                   | 3 731                  | 19 468                                  | 10 963                                  | -2,9%                                   | 256   | -1,1%                                       |
| 9    | ES      | BARCELONA               | 30 364                                   | 12 633                 | 13 901                                  | 3 831                                   | -7,3%                                   | 304   | -7,9%                                       |
| 10   | FR      | PARIS/ORLY              | 26 188                                   | 14 603                 | 5 806                                   | 5 778                                   | -0,9%                                   | 234   | -2,0%                                       |
| 11   | IE      | DUBLIN                  | 23 379                                   | 828                    | 19 936                                  | 2 616                                   | 0,8%                                    | 197   | 0,0%  |
| 12   | ES      | PALMA DE MALLORCA       | 22 807                                   | 6 313                  | 15 602                                  | 892                                     | -1,6%                                   | 177   | -0,7%                                       |
| 13   | UK      | LONDON/STANSTED         | 22 338                                   | 2 343                  | 18 595                                  | 1 400                                   | -6,0%                                   | 167   | -8,0%                                       |
| 14   | DK      | KØBENHAVN/KASTRUP       | 21 687                                   | 1 894                  | 13 650                                  | 6 142                                   | 1,8%                                    | 254   | 5,0%  |
| 15   | UK      | MANCHESTER              | 21 062                                   | 2 944                  | 11 847                                  | 6 272                                   | -3,8%                                   | 189   | -7,4%                                       |
| 16   | AT      | WIEN/SCHWECHAT          | 19 687                                   | 684                    | 12 446                                  | 6 557                                   | 5,2%                                    | 259   | 4,8%  |
| 17   | IT      | MILANO/MALPENSA         | 19 012                                   | 3 086                  | 9 655                                   | 6 272                                   | -19,5%                                  | 201   | -19,5%                                      |
| 18   | BE      | BRUXELLES/NATIONAL      | 18 369                                   | 2                      | 12 047                                  | 6 320                                   | 3,5%                                    | 219   | 1,6%  |
| 19   | SE      | STOCKHOLM/MARLANDA      | 18 126                                   | 4 849                  | 9 352                                   | 3 925                                   | 1,2%                                    | 204   | 2,8%  |
| 20   | DE      | DÜSSELDORF              | 18 103                                   | 4 440                  | 8 485                                   | 5 179                                   | 1,8%                                    | 220   | 0,7%  |
| 21   | EL      | ATHINAI                 | 16 362                                   | 5 796                  | 7 811                                   | 2 755                                   | -1,0%                                   | 183   | -0,6%                                       |
| 22   | DE      | BERLIN/TEGEL            | 14 454                                   | 6 983                  | 5 275                                   | 2 195                                   | 8,4%                                    | 153   | 6,2%  |
| 23   | PT      | LISBOA                  | 13 604                                   | 2 009                  | 8 023                                   | 3 572                                   | 1,6%                                    | 137   | -2,3%                                       |
| 24   | FI      | HELSINKI/VANTAA         | 13 435                                   | 2 701                  | 7 844                                   | 2 889                                   | 2,2%                                    | 174   | 2,9%  |
| 25   | DE      | HAMBURG                 | 12 782                                   | 5 534                  | 5 069                                   | 2 179                                   | 0,7%                                    | 149   | -0,4%                                       |
| 26   | ES      | MALAGA                  | 12 754                                   | 2 794                  | 9 298                                   | 662                                     | -6,0%                                   | 107   | -6,6%                                       |
| 27   | CZ      | PRAHA/RUZYNE            | 12 587                                   | 139                    | 9 191                                   | 3 256                                   | 1,8%                                    | 166   | 3,1%  |
| 28   | FR      | NICE/CÔTE D'AZUR        | 10 365                                   | 4 370                  | 4 546                                   | 1 449                                   | -0,2%                                   | 165   | -3,8%                                       |
| 29   | DE      | KÖLN/BONN               | 10 296                                   | 3 716                  | 4 791                                   | 1 790                                   | -1,0%                                   | 104   | -5,3%                                       |
| 30   | UK      | LONDON/LUTON            | 10 174                                   | 1 321                  | 7 867                                   | 986                                     | 2,6%                                    | 83  | 3,2%  |
| 35   | PL      | WARSZAWA/OKECIE         | 9 480                                    | 943                    | 6 134                                   | 2 404                                   | 2,7%                                    | 139   | -1,7%                                       |
| 38   | HU      | BUDAPEST/FERIHEGY       | 8 429                                    | -                      | 6 392                                   | 2 037                                   | -1,8%                                   | 105   | -4,6%                                       |
| 54   | CY      | LARNAKA                 | 5 477                                    | -                      | 4 255                                   | 1 222                                   | 4,1%                                    | 54  | 4,5%  |
| 60   | RO      | BUCUREȘTI/OTOPENI       | 5 063                                    | 504                    | 3 637                                   | 922                                     | 2,5%                                    | 68  | 2,8%  |
| 76   | LV      | RIGA                    | 3 687                                    | 31                     | 2 770                                   | 887                                     | 16,8%                                   | 54  | 23,5%                                       |
| 84   | BG      | SOFIA                   | 3 205                                    | 137                    | 2 609                                   | 458                                     | 17,7%                                   | 39  | 14,0%                                       |
| 85   | MT      | MALTA/LUQA              | 3 125                                    | -                      | 2 849                                   | 276                                     | 5,2%                                    | 27  | -1,0%                                       |
| 103  | SK      | BRATISLAVA/IVANKA       | 2 206                                    | 194                    | 1 680                                   | 333                                     | 11,6%                                   | 25  | 12,3%                                       |
| 104  | LT      | VILNIUS                 | 2 042                                    | 0                      | 1 566                                   | 476                                     | 19,1%                                   | 35  | 19,7%                                       |
| 118  | EE      | TALLINN/ÜLEMISTE        | 1 804                                    | 21                     | 1 445                                   | 339                                     | 4,8%                                    | 32  | 9,5%  |
| 124  | LU      | LUXEMBOURG              | 1 713                                    | 0                      | 1 383                                   | 329                                     | 4,8%                                    | 39  | 2,3%  |
| 127  | SI      | LJUBLJANA/JOŽE PUČNIK   | 1 649                                    | -                      | 1 010                                   | 639                                     | 9,6%                                    | 37  | 9,1%  |

Source: Eurostat ([AVIA\\_PAOA](#))

Table 2 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.

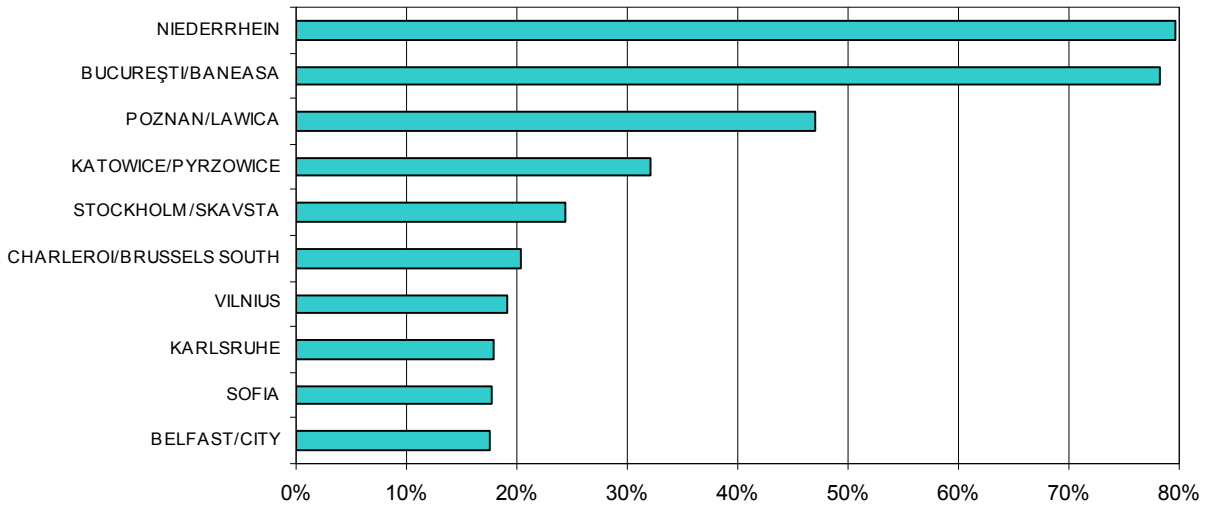
The top 5 rank does not show any change compared to 2007, but it is significant that only Paris/Charles de Gaulle recorded positive growth throughout the year.

The most significant variations in the ranking were recorded by Rome/Fiumicino (from 9 to 6) and Milano/Malpensa (from 12 to 17). The reason for this was the decision taken by Alitalia to abandon Milano/Malpensa as a hub, transferring part of their operations to Rome/Fiumicino in March 2008.

As regards the impact of the economic crisis, almost all airports featured in Table 2 reported a negative growth in the last quarter of 2008. Only three airports (Larnaka, Bucharest/Otopeni and Riga International) reported passenger growth in that quarter.

Graph 4 highlights those airports which reported more than 1 million passengers in 2008 with the greatest growths. In all cases, they are medium size airports where passenger transport has been boosted by the increasing operations performed by low cost carriers during the year.

**Graph 4: Top 10 airports\* in terms of growth between 2007 and 2008**



\*Airports with more than 1 million passengers carried in 2008

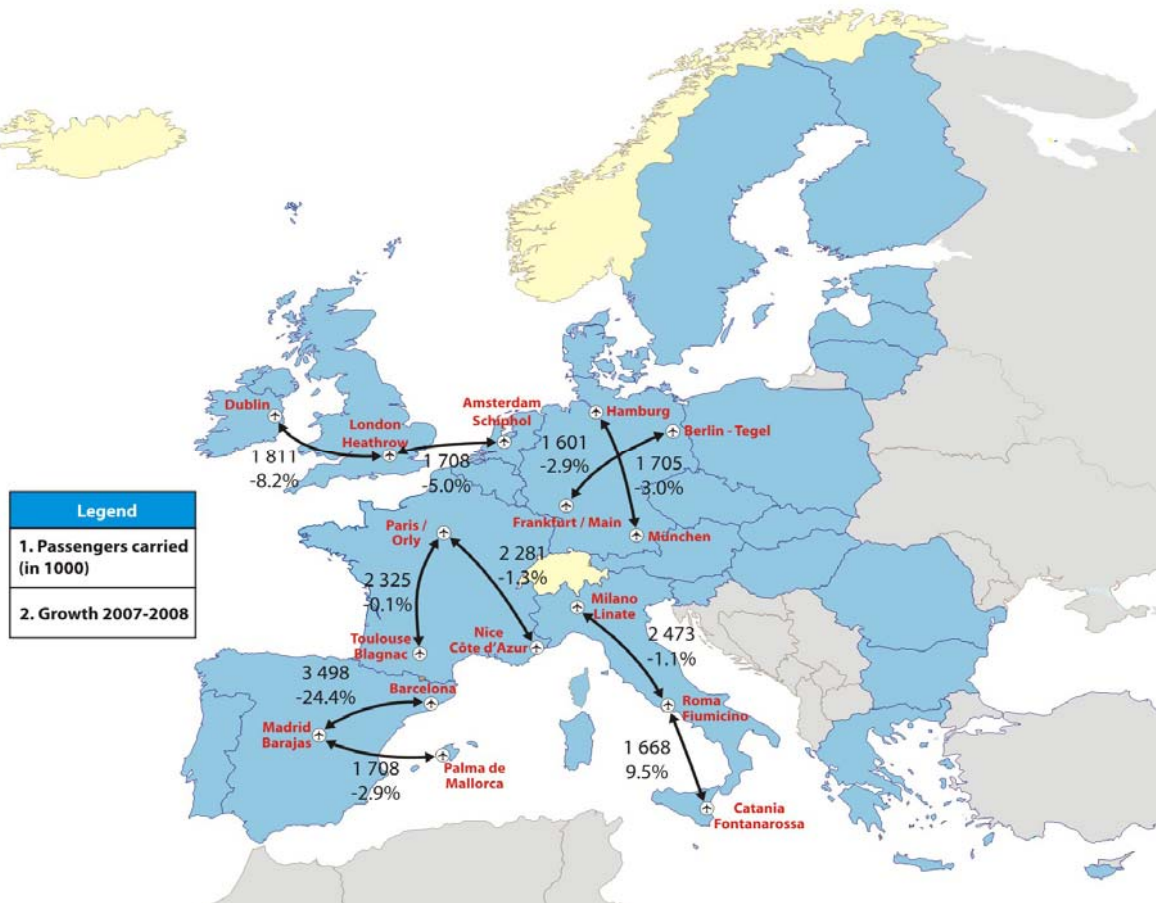
Source: Eurostat ([AVIA\\_PAOA](#))

Map 3 shows the top 10 airport pairs within the EU-27. Notably, 8 of them concerned national transport. The largest national route was between Barcelona and Madrid with about 40% more passengers than any other. However, this route has experienced a significant decrease in 2008 (-24%). The opening of the high-speed rail line between these two cities was the main reason for this

reduction in air passengers.

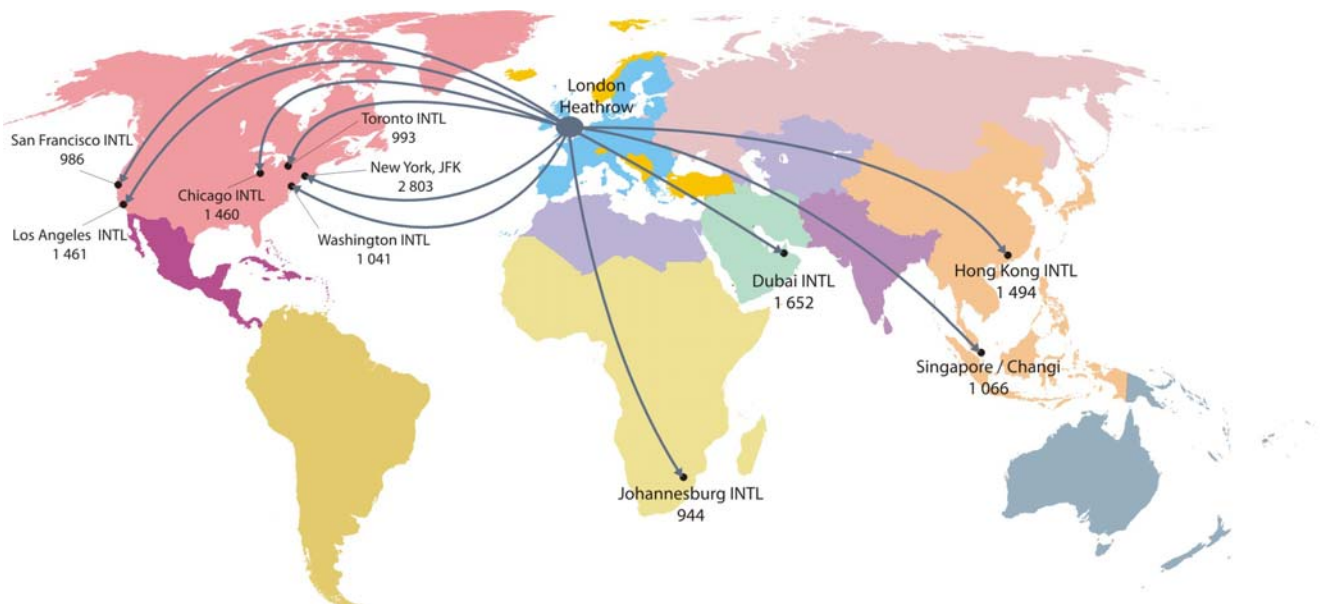
Generally speaking, national traffic in the EU-27 fell by 3% during the course of 2008. Quarterly statistics suggest that this market has been significantly affected with falls of 4% in the third quarter and 9% in the fourth quarter.

**Map 3: Top 10 airport pairs within the EU-27 in 2008**



Source: Eurostat ([AVIA\\_PAR\\_ES](#), [AVIA\\_PAR\\_DE](#), [AVIA\\_PAR\\_FR](#), [AVIA\\_PAR\\_IT](#), [AVIA\\_PAR\\_UK](#))

**Map 4: London Heathrow, the main European hub for extra-EU transport (Passengers carried in 1000, arrivals plus departures)**



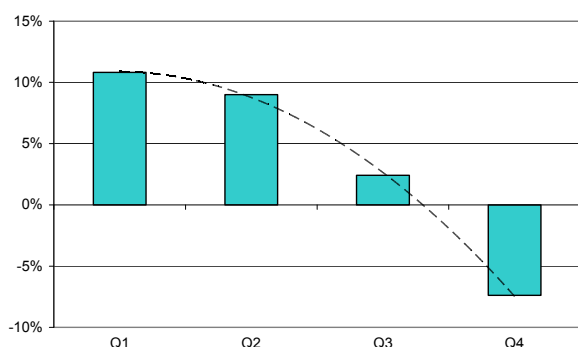
Source: Eurostat ([AVIA PAR UK](#))

London Heathrow was the main European hub for extra-EU transport. Thirteen of the top 20 extra-EU air passenger routes include London Heathrow as one of the airport pairs, including the top five routes. This does not imply that the UK is the origin or destination for all of the passengers using these services, as a significant proportion of them are connecting passengers.

The largest extra-EU route in 2008 was London Heathrow-New York JFK, which reported 2.8 million passengers. Other significant extra-EU-27 routes not involving London Heathrow include those between Copenhagen and Oslo, with 1.3 million passengers, Paris-Charles de Gaulle – New York JFK with 1.2 million passengers and Paris Charles de Gaulle – Montreal with 1.1 million passengers.

## Air freight and mail transport

**Graph 5: Quarterly growth of freight and mail transport between same quarters of 2007 and 2008**



Source: Eurostat ([AVIA GOOC](#))

At EU-27 level, 12.9 million tonnes of freight and mail were transported in 2008. This represents an increase of 3.3% compared to 2007. Looking at the underlying quarterly data, a positive growth was registered during the first three quarters of 2008.

The effect of the economic slowdown began to be observed during the last three months of the year when tonnage fell progressively by 1% in October, 7% in November and 14% in December.

**Table 3: Overview of EU-27 air freight and mail transport by Member States in 2008: freight and mail carried (in tonnes)**

|                 |    | Total transport   |                  | National transport |                  | International intra-EU-27 transport |                  | International extra-EU-27 transport |                  |
|-----------------|----|-------------------|------------------|--------------------|------------------|-------------------------------------|------------------|-------------------------------------|------------------|
|                 |    | Freight and mail  | Growth 2007-2008 | Freight and mail   | Growth 2007-2008 | Freight and mail                    | Growth 2007-2008 | Freight and mail                    | Growth 2007-2008 |
| BELGIUM         | BE | 1 071 346         | -11.0%           | 595                | 59.5%            | 317 212                             | -33.8%           | 753 539                             | 4.1%             |
| BULGARIA        | BG | 19 533            | 4.3%             | 32                 | 56.8%            | 15 391                              | 7.9%             | 4 110                               | -7.4%            |
| CZECH REPUBLIC  | CZ | 55 906            | -6.7%            | 1 893              | -9.9%            | 30 600                              | -18.9%           | 23 413                              | 16.5%            |
| DENMARK         | DK | 254 100           | :                | 2 603              | :                | 112 777                             | :                | 138 720                             | :                |
| GERMANY         | DE | 3 568 668         | 4.4%             | 129 619            | 22.0%            | 803 644                             | 18.1%            | 2 635 404                           | 0.1%             |
| ESTONIA         | EE | 41 744            | 84.4%            | -                  | -                | 7 104                               | 20.3%            | 34 640                              | 107.1%           |
| IRELAND         | IE | 126 855           | -4.4%            | 7 748              | -28.3%           | 73 880                              | 5.5%             | 45 227                              | -12.9%           |
| GREECE          | EL | 108 628           | 5.5%             | 14 174             | 5.0%             | 59 376                              | -1.7%            | 35 078                              | 20.6%            |
| SPAIN           | ES | 539 803           | 5.7%             | 101 545            | -7.2%            | 164 489                             | -4.7%            | 273 769                             | 19.8%            |
| FRANCE *        | FR | 1 668 136         | -2.3%            | 145 540            | -9.9%            | 295 492                             | -3.0%            | 1 227 104                           | -1.1%            |
| ITALY           | IT | 814 995           | -10.1%           | 68 301             | -8.4%            | 269 529                             | -9.1%            | 477 165                             | -10.9%           |
| CYPRUS          | CY | 42 795            | 1.8%             | -                  | -                | 34 072                              | 1.8%             | 8 723                               | 2.0%             |
| LATVIA          | LV | 6 884             | -4.3%            | -                  | -                | 4 765                               | 2.4%             | 2 119                               | -16.7%           |
| LITHUANIA       | LT | 9 049             | -29.3%           | 1                  | :                | 6 500                               | -5.2%            | 2 548                               | -57.1%           |
| LUXEMBOURG      | LU | 788 218           | 12.2%            | -                  | -                | 45 705                              | -32.6%           | 742 513                             | 17.0%            |
| HUNGARY         | HU | 62 544            | -7.5%            | -                  | -                | 26 001                              | -20.0%           | 36 543                              | 4.1%             |
| MALTA           | MT | 18 256            | 1.5%             | -                  | -                | 12 827                              | -0.9%            | 5 429                               | 7.5%             |
| NETHERLANDS     | NL | 1 648 519         | -3.6%            | 0                  | -64.9%           | 60 656                              | 11.6%            | 1 587 863                           | -4.1%            |
| AUSTRIA         | AT | 206 221           | -0.2%            | 887                | 5.7%             | 52 592                              | -4.6%            | 152 742                             | 1.4%             |
| POLAND          | PL | 58 148            | 30.0%            | 7 839              | 9.1%             | 29 987                              | 56.2%            | 20 323                              | 10.7%            |
| PORTUGAL        | PT | 136 361           | 4.2%             | 22 106             | -1.0%            | 60 934                              | -1.6%            | 53 321                              | 14.5%            |
| ROMANIA         | RO | 24 431            | 27.1%            | 299                | -38.4%           | 18 546                              | 29.9%            | 5 586                               | 25.1%            |
| SLOVENIA        | SI | 8 180             | -34.6%           | 2                  | -84.6%           | 5 883                               | -38.0%           | 2 295                               | -23.9%           |
| SLOVAKIA        | SK | 7 432             | 225.7%           | 1                  | 0.0%             | 6 760                               | 718.4%           | 671                                 | -53.9%           |
| FINLAND         | FI | 147 822           | 1.2%             | 3 602              | -18.6%           | 58 401                              | -15.2%           | 85 819                              | 17.8%            |
| SWEDEN          | SE | 206 217           | :                | 21 864             | :                | 98 831                              | :                | 85 522                              | :                |
| UNITED KINGDOM  | UK | 2 411 459         | -1.3%            | 125 319            | 4.4%             | 411 209                             | -6.1%            | 1 874 930                           | -0.6%            |
| <b>EU-27 **</b> |    | <b>12 909 824</b> | <b>3.3%</b>      | <b>653 970</b>     | <b>2.9%</b>      | <b>1 940 739</b>                    | <b>5.3%</b>      | <b>10 315 115</b>                   | <b>3.0%</b>      |

\* Due to freight and mail data collection difficulties, the data for the two main airports in Paris (Charles de Gaulle and Orly) are underestimated. This also affects the aggregated freight data for France.

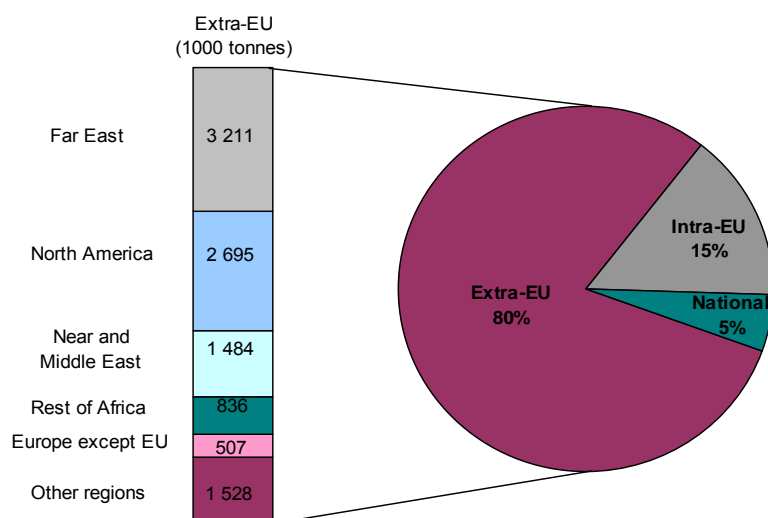
\*\* The EU growths are calculated by excluding the declarations from Sweden and from Copenhagen airport, as such data are not available in 2007. Also, double counting is excluded in the intra-EU-27 and total EU-27 aggregates by taking into consideration only departure declarations.

Source: Eurostat ([AVIA\\_GOOC](#))

The extra-EU air freight and mail market is by far the most important segment representing 80% of the total. It indicates that within the intra-EU and national markets there are often alternatives for competition between modes of transport.

Graph 6 shows the breakdown of extra-EU transport by world region where the Far East is the main extra-EU partner region, accounting alone for more than 30% of this market.

**Graph 6: Overview of the EU-27 air freight and mail transport in 2008**



Source: Eurostat ([AVIA\\_GOOC](#), [AVIA\\_GOEXCC](#))



In March 2008, DHL Express, one of the main market actors, moved its main European hub from Brussels/National to Leipzig/Halle. This is reflected in Table 4 where Leipzig/Halle appears for the first time in the top 20 airports (8) with a spectacular growth of 400% compared to 2007. The side effect was a decline in the figures of Brussels/National

and also of Köln/Bonn. Furthermore, DHL Express launched a new regular cargo service between Leipzig/Halle and Bratislava/Ivanka converting this last airport into a sub-hub for the company. This explains the huge growth shown for Slovakia in Table 3.

**Table 4: Top 20 airports in the EU-27 in terms of total freight and mail carried in 2008 (in tonnes)**

| Rank | Country | Airport                   | Total air transport (in tonnes) | Freight and mail loaded | Freight and mail unloaded | Growth of total freight transport 2007-2008 | Total number of freight flights (in 1000) | Growth of total number of freight flights 2007-2008 |
|------|---------|---------------------------|---------------------------------|-------------------------|---------------------------|---|---|---|
| 1    | DE      | FRANKFURT/MAIN            | 2 104 348                       | 1 065 020               | 1 039 329                 | -2.7%                                       | 25  | -1.5%   |
| 2    | NL      | AMSTERDAM/SCHIPHOL        | 1 592 455                       | 846 676                 | 745 780                   | -3.5%                                       | 17  | -1.8%   |
| 3    | UK      | LONDON HEATHROW           | 1 482 662                       | 814 608                 | 668 054                   | 6.4%  | 3   | -0.5%   |
| 4    | FR      | PARIS-CHARLES DE GAULLE * | 1 392 147                       | 684 531                 | 707 616                   | -3.0%                                       | 48  | 1.2%  |
| 5    | LU      | LUXEMBOURG                | 788 218                         | 376 610                 | 411 608                   | 12.2%                                       | 12  | 0.4%  |
| 6    | BE      | BRUXELLES/NATIONAL        | 614 385                         | 311 745                 | 302 640                   | -16.3%                                      | 17  | -2.0%   |
| 7    | DE      | KÖLN/BONN                 | 574 123                         | 267 723                 | 306 400                   | -19.1%                                      | 24  | -7.3%   |
| 8    | DE      | LEIPZIG/HALLE             | 430 236                         | 217 349                 | 212 887                   | 399.7%                                      | 27  | 31.7%   |
| 9    | IT      | MILANO/MALPENSA           | 414 130                         | 207 950                 | 206 180                   | -14.2%                                      | 7   | -19.3%  |
| 10   | BE      | LIEGE/BIERSET             | 381 637                         | 181 790                 | 199 847                   | 4.9%  | 24  | 0.2%  |
| 11   | ES      | MADRID/BARAJAS            | 355 032                         | 174 594                 | 180 438                   | 3.9%  | 11  | -2.3%   |
| 12   | UK      | NOTTINGHAM EAST MIDLANDS  | 292 366                         | 145 640                 | 146 727                   | -8.2%                                       | 20  | 7.5%  |
| 13   | DE      | MÜNCHEN                   | 264 908                         | 127 798                 | 137 110                   | -0.1%                                       | 5   | 0.3%  |
| 14   | DK      | KØBENHAVN/KASTRUP         | 246 794                         | 127 157                 | 119 637                   | :   | 8   | 4.6%  |
| 15   | UK      | LONDON STANSTED           | 230 063                         | 134 023                 | 96 039                    | 2.1%  | 11  | -7.4%   |
| 16   | AT      | WIEN-SCHWECHAT            | 201 287                         | 123 979                 | 77 308                    | -1.8%                                       | 4   | 4.5%  |
| 17   | IT      | ROMA/FIUMICINO            | 152 999                         | 71 334                  | 81 665                    | -0.6%                                       | 5   | 2.4%  |
| 18   | UK      | MANCHESTER                | 142 594                         | 84 293                  | 58 301                    | -14.2%                                      | 3   | -7.4%   |
| 19   | FI      | HELSINKI-VANTAA           | 141 524                         | 72 817                  | 68 707                    | 0.2%  | 6   | 2.5%  |
| 20   | DE      | FRANKFURT-HAHN            | 122 131                         | 60 429                  | 61 702                    | 9.4%  | 4   | -2.8%   |

\* Due to freight and mail data collection difficulties, the data for Paris-Charles de Gaulle are underestimated.

Source: Eurostat ([AVIA GOOA](#))

## Air transport in the Candidate and EFTA countries

Iceland was particularly affected by the economic slowdown, with passenger numbers falling in all but the first quarter of 2008. On the other hand, Switzerland and Norway maintained growth

throughout the year although increases in the fourth quarter fell to 1% and 3% respectively.

**Table 5: Overview of air passenger transport in Candidate and EFTA countries in 2008 (in 1000 passengers and in tonnes)**

|  |                   | Passengers carried |                  |                    |                         | Freight and mail loaded/unloaded |                  |                    |                         |
|--|-------------------|--------------------|------------------|--------------------|-------------------------|----------------------------------|------------------|--------------------|-------------------------|
|  |                   | Total (in 1000)    | Growth 2007-2008 | National transport | International transport | Total (in tonnes)                | Growth 2007-2008 | National transport | International transport |
| CROATIA  | HR                | 4 504              | 5.6%             | 528                | 3 976                   | 8 578                            | -23.7%           | 1 588              | 6 990                   |
| Former Yugoslav Republic of Macedonia <sup>(1)</sup> | MK <sup>(2)</sup> | 688                | 3.6%             | :                  | :                       | 2 330                            | 7.5%             | :                  | :                       |
| TURKEY <sup>(1)</sup>                                | TR                | 79 373             | 12.9%            | :                  | :                       | 421 132                          | 1.8%             | :                  | :                       |
| ICELAND <sup>(1)(3)</sup>                            | IS                | 3 201              | -7.5%            | :                  | 2 241                   | 57 416                           | -13.0%           | :                  | 54 739                  |
| NORWAY   | NO                | 27 717             | 5.0%             | 13 482             | 14 235                  | 3 516                            | 5.8%             | 0                  | 3 516                   |
| SWITZERLAND  | CH                | 36 596             | 6.0%             | 680                | 35 916                  | 347 979                          | -1.9%            | 4 686              | 343 294                 |

<sup>(1)</sup> Total based on the addition of airport declarations

<sup>(2)</sup> The former Yugoslav Republic of Macedonia, ISO code 3166. Provisional code which does not prejudice in any way the definitive nomenclature for this country, which will be agreed following the conclusion of negotiations currently taking place under the auspices of the United Nations.

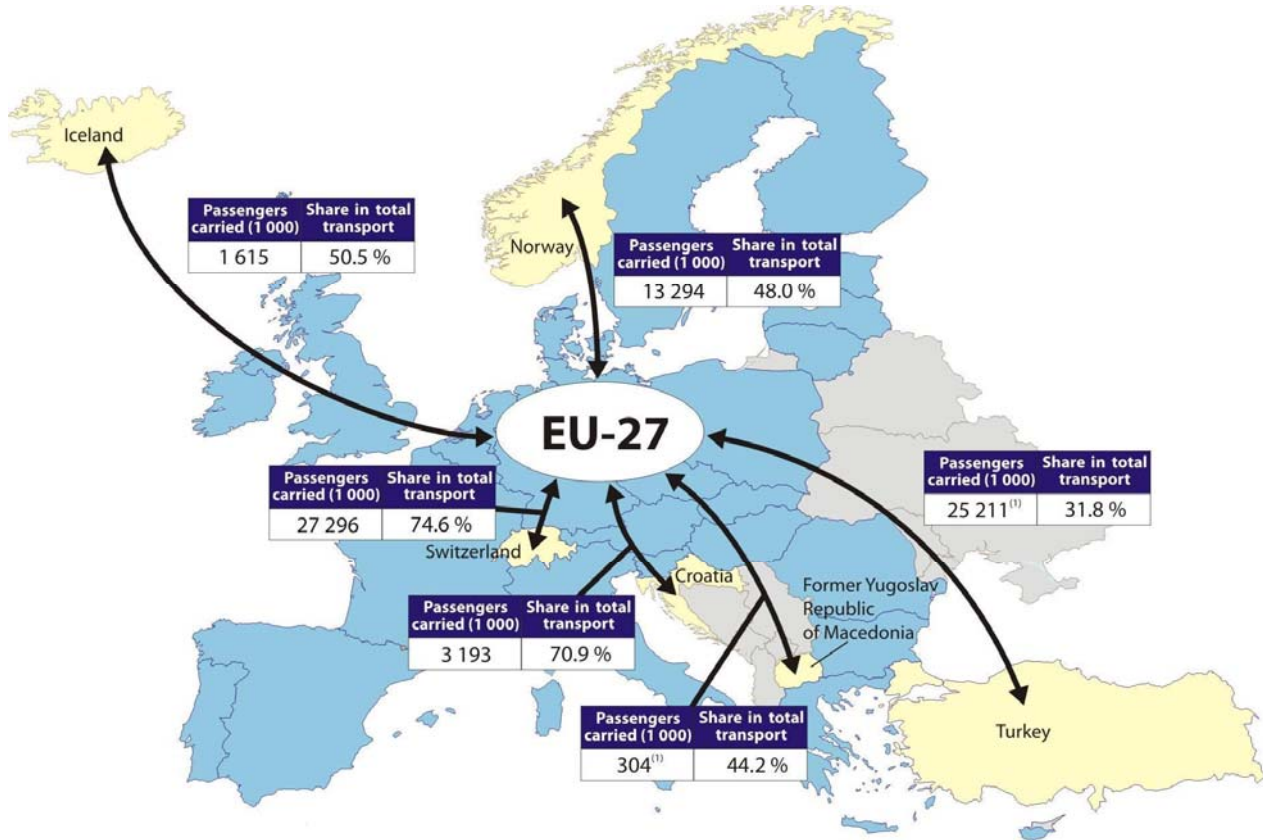
<sup>(3)</sup> International transport concerns only Keflavik airport

Source: Eurostat ([AVIA GOOC](#), [AVIA PAOC](#), [AVIA TF APAL](#))

The volume of passenger traffic reported by Turkey seems unaffected by the economic situation with double digit growth in every quarter, including the last one when an impressive 15% growth was recorded. The opposite trend appears

for freight and mail transport in Croatia, with a significant decrease of 24% while in the meantime, the annual growth in passenger transport remained positive.

**Map 5: Air passenger transport between Candidate/EFTA countries and the EU-27 in 2008 (in 1000 passengers)**



<sup>(1)</sup> The volume of passengers carried to/from EU-27 is estimated from EU-27 declarations

Source: Eurostat ([AVIA PAOC](#))

Map 5 presents the air passenger flows between the EU-27 and Candidate/EFTA Countries. The largest flows were recorded with Switzerland (mainly business traffic) and Turkey (mainly leisure market).

The largest two airports within the Candidate/EFTA countries were Istanbul/Ataturk, which registered a steady growth all through the year, and Zürich, which recorded a positive growth in each month but with a declining trend.

**Table 6: Top 2 airports by Candidate and EFTA countries in 2008**

| Major Airports |                  | Total passengers (in 1000) | Growth 2007-2008 | Total freight and mail (in tonnes) | Growth 2007-2008 | Total flights (in 1000) | Growth 2007-2008 |
|----------------|------------------|----------------------------|------------------|------------------------------------|------------------|-------------------------|------------------|
| HR             | ZAGREB           | 2 174                      | 10.1%            | 8 173                              | -24.1%           | 40                      | :                |
|                | SPLIT/KASTELA    | 1 174                      | 2.3%             | 932                                | -36.1%           | 17                      | :                |
| MK*            | SKOPJE           | 645                        | 3.8%             | 2 325                              | 7.9%             | 11                      | 1.4%             |
|                | OHRID            | 43                         | 1.7%             | 5                                  | -57.6%           | 1                       | -14.8%           |
| TR             | ISTANBUL/ATATÜRK | 28 553                     | 23.1%            | 359 603                            | 5.3%             | 255                     | 4.6%             |
|                | ANTALYA          | 18 789                     | 6.1%             | 6 574                              | 1.4%             | 124                     | 11.2%            |
| IS             | KEFLAVIK         | 2 241                      | -9.0%            | 54 739                             | 16.7%            | 19                      | -6.3%            |
|                | REYKJAVIK        | 462                        | -1.6%            | 1 307                              | -12.1%           | 22                      | -3.9%            |
| NO             | OSLO/GARDERMOEN  | 18 530                     | 3.0%             | 2 579                              | 10.4%            | 234                     | 3.3%             |
|                | BERGEN/FLESAND   | 4 530                      | 3.0%             | 3 041                              | -22.6%           | 75                      | 1.7%             |
| CH             | ZÜRICH           | 22 074                     | 6.5%             | 282 409                            | 1.2%             | 231                     | 3.5%             |
|                | GENÈVE           | 11 316                     | 5.4%             | 31 108                             | -14.6%           | 131                     | 2.3%             |

\* The former Yugoslav Republic of Macedonia, ISO code 3166. Provisional code which does not prejudice in any way the definitive nomenclature for this country, which will be agreed following the conclusion of negotiations currently taking place under the auspices of the United Nations.

Source: Eurostat ([AVIA GOOA](#), [AVIA PAOA](#), [AVIA TF APAL](#))

## 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:

**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.

**Freight and mail loaded/unloaded:** All freight and mail loaded onto or unloaded from an aircraft. This excludes direct transit freight and mail.

**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.

In principle, information provided in this publication is based on On Flight Origin/Destination data. Only when OFOD data have not 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 2008.

### Notes on some Reporting Countries

**Denmark:** Freight loaded/unloaded for Kobenhavn/Kastrup airport was not available in 2007. For this reason, in Tables 3 and 4 the growth 2007-2008 has not been calculated.

**France:** Due to freight and mail data collection difficulties, the freight data for the two main

airports in Paris (Charles de Gaulle and Orly) are underestimated. This also affects the aggregated freight data for France.

**Ireland:** Galway airport declarations for 2007 were available only from August to October. In Table 1, the growth 2007-2008 have been calculated excluding Galway airport

**Sweden:** Freight data was not available in 2007.

**Turkey:** Only provides airport declarations (Dataset C1).

**Iceland:** Airport declarations have been used. Only data for Keflavik airport were available for on flight origin and destination.

**Former Yugoslav Republic of Macedonia:** Only provides airport declarations (Dataset C1).

### National transport

The national aggregates have been calculated excluding double counting.

### International intra-EU-27 aggregates

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

### Map 1

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 2

The component countries comprising the world regions as defined for this Map are based on the geonomenclature used by Eurostat for 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.

### Map 3

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"

"-" means "not applicable"

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

## Further information

---

Eurostat Website: <http://ec.europa.eu/eurostat>

Data on "Transport statistics":

<http://epp.eurostat.ec.europa.eu/portal/page/portal/transport/data/database>  
(Select "Air transport")

More information about "Transport statistics":

<http://epp.eurostat.ec.europa.eu/portal/page/portal/transport/introduction>

---

### **Journalists can contact the media support service:**

Bech Building Office A4/125 L - 2920 Luxembourg

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

E-mail: [eurostat-mediasupport@ec.europa.eu](mailto: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:

<http://ec.europa.eu/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.europa.eu>

E-mail: [info@publications.europa.eu](mailto:info@publications.europa.eu)

---

Manuscript completed on: 26.11.2009

Data extracted on: 23.10.2009

ISSN 1977-0316

Catalogue number: KS-SF-09-091-EN-N

© European Union, 2009