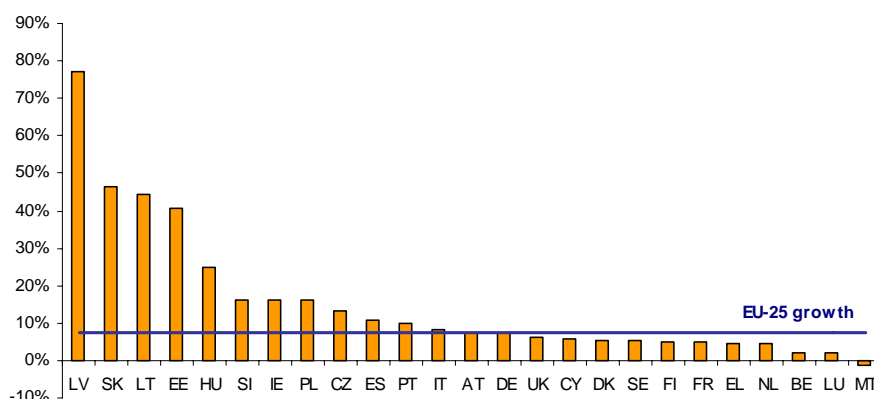


Air transport in Europe in 2005

Air passenger transport increases 8.5% in the EU-25

Graph 1: 2004/2005 growth in total passenger air transport by Member State (in %)



Highlights

The total number of passengers transported by air to or from and within the EU-25 Member States in 2005 was about 706 million. This represents an increase of 8.5% compared to 2004.

All Member States except Malta reported increases in the number of air passengers between 2004 and 2005. The growth registered by all of the 8 new Member States in Central and Eastern Europe was significantly higher than the average for EU-25. Latvia recorded the largest increase (77% growth).

The top ranked airport in terms of passenger numbers remains London/Heathrow with about 68 million representing some 6% of the total EU-25 air passenger transport. Paris/Charles de Gaulle and Frankfurt/Main maintained second and third places.

Six country-to-country flows within the EU-25 recorded over 10 million passengers in 2005. The largest were Spain-UK with about 35 million and Germany-Spain with 21 million. Regarding airport-to-airport flows, Madrid/Barajas – Barcelona is the largest within the EU-25 (4.3 million) and London/Heathrow – New York/JFK Intl. is the main one on extra-EU-25 transport (2.9 million).

The total volume of freight and mail transported by air transport to or from and within the EU-25 Member States in 2005 was almost 11 million tonnes (excluding Sweden). 80% of freight transport was with extra-EU-25 countries. Four Member States reported the carriage of over one million tonnes: Germany led (3.0 million tonnes), followed by the UK (2.5 million tonnes), the Netherlands (1.6 million tonnes) and France (1.5 million tonnes).

Statistics in focus

TRANSPORT

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Author

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Air passenger transport in the EU-25

General development

Table 1 below presents the absolute number of air passengers in 2005 and the growth between 2004 and 2005. The figures for national transport are reported excluding the double counting between national partner airports. In parallel, the aggregated EU-25 figures shown under international intra-EU-25 transport and total transport also exclude the double counting between EU-25 partner airports.

The growth for the EU-25 was 8.5% in 2005. This follows a similar trend in 2004 where the growth was 8.8%. With the exception of Malta, which reported a fall of 1.2%, all Member States registered an increase in 2005. Eight of the ten Member States that reported

growth of more than 10% were located in Central and Eastern Europe. The largest percentage increase was recorded by Latvia, followed by Slovakia. In absolute numbers Spain (13.9 million) and the United Kingdom (11.7 million) recorded the largest increase in the number of air transport passengers.

The United Kingdom reported the largest volume of air passengers handled, more than 204 million. This represented more than 21% of all air passenger traffic handled at EU-25 airports in 2005. Germany and Spain were in second and third positions each handling more than 15%.

Table 1: Overview of EU-25 air passenger transport by Member State in 2005

	Total transport		National transport		International intra-EU-25 transport		International extra-EU-25 transport	
	Passengers (in 1000)	Growth 2004-2005	Passengers (in 1000)	Growth 2004-2005	Passengers (in 1000)	Growth 2004-2005	Passengers (in 1000)	Growth 2004-2005
BELGIUM	17 814	2.0%	1	20.4%	12 885	-1.3%	4 928	11.6%
CZECH REPUBLIC	11 266	13.2%	195	12.3%	8 042	11.4%	3 029	18.3%
DENMARK	22 173	5.6%	1 672	3.9%	14 254	5.5%	6 247	6.2%
GERMANY	145 977	7.5%	21 901	2.4%	73 904	9.9%	50 172	6.3%
ESTONIA	1 393	40.6%	21	27.4%	1 192	40.7%	180	41.5%
GREECE	30 799	4.4%	5 763	4.7%	21 398	2.9%	3 638	13.0%
SPAIN	143 680	10.7%	39 005	14.7%	89 483	8.1%	15 191	16.9%
FRANCE	107 955	4.8%	26 661	-1.3%	42 995	5.1%	38 300	9.0%
IRELAND	24 254	16.3%	641	-6.4%	21 023	17.5%	2 590	13.6%
ITALY	87 906	8.2%	24 664	1.9%	46 152	11.0%	17 091	10.7%
CYPRUS	6 782	5.6%	0	:	5 643	7.5%	1 139	-2.7%
LATVIA	1 872	77.3%	0	:	1 589	79.0%	282	67.9%
LITHUANIA	1 434	44.3%	3	43.1%	1 194	46.2%	237	35.2%
LUXEMBOURG	1 538	1.9%	0	:	1 313	-0.5%	225	19.2%
HUNGARY	8 049	24.9%	2	:	5 951	31.7%	2 096	8.9%
MALTA	2 757	-1.2%	8	-78.3%	2 444	0.0%	305	-0.8%
NETHERLANDS	46 433	4.4%	82	-23.2%	26 173	3.7%	20 178	5.4%
AUSTRIA	19 685	7.6%	575	2.3%	12 265	5.8%	6 844	11.4%
POLAND	7 080	16.2%	861	-3.5%	4 597	23.0%	1 622	11.0%
PORTUGAL	20 272	10.0%	2 966	21.2%	13 954	6.7%	3 352	15.9%
SLOVENIA	1 217	16.3%	0	:	786	29.7%	431	-2.1%
SLOVAKIA	1 583	46.4%	127	256.0%	1 101	59.3%	355	0.3%
FINLAND	12 348	4.8%	2 819	-1.5%	7 476	5.5%	2 053	11.6%
SWEDEN	22 899	5.4%	7 301	3.9%	11 705	3.3%	3 893	16.1%
UNITED KINGDOM	204 013	6.1%	26 688	3.8%	116 438	5.4%	60 887	8.5%
EUROPEAN UNION	705 821	8.5%	161 957	5.0%	298 597	10.0%	245 266	9.0%

When considering the breakdown between national and international passenger transport, a marked difference can be observed. Whereas the growth in international transport has followed that of total transport, in domestic transport there has been a decrease in some countries. When looking at the breakdown of international transport between intra-EU-25 and extra-EU-25 transport, the same general development as total transport can be observed.

Table 2 below provides an EU-25 ranking of the 30 busiest airports in 2005 in terms of total passengers carried, together with the rank of the top airport for the 9 Member States where no airport appeared in the top 30 (with the exception of Slovakia). All of the top 30 airports recorded an increase in passengers compared to 2004.

The top 6 EU-25 airports remained the same as in 2004. London/Heathrow continues to be the busiest

airport in the EU-25, handling almost 6% of all air passengers. Paris/Charles-de-Gaulle and Frankfurt/Main remain in second and third places. Among the top 30 EU-25 airports, only 4 airports registered a growth in total number of passengers of more than 10% between 2004 and 2005: Cologne/Bonn, Prague/Ruzyne and Barcelona.

Table 2 also shows the number of flights operated at each airport. The number of flights includes both freight and passenger services and therefore caution must be exercised when comparing these to passenger numbers. In many cases, the growth in the number of flights is less than the corresponding growth in passengers; this suggests an increase in the number of

seats occupied per flight (load factor) or that bigger aircrafts have been used.

The mix of long-haul and short-haul routes flown from an airport and the type of service, especially charter flights to holiday destinations, have a marked impact upon the average number of passengers carried per flight. The top 10 airports in terms of the number of passengers carried per flight include London/Heathrow and Amsterdam/Schiphol which all handle significant proportions of international extra-EU-25 passengers as well as Palma de Mallorca and Malaga which receive significant levels of high capacity charter flights. London/Gatwick which handles significant charter as well as long-haul services also features in the ranking.

Table 2: Top airports in the EU-25 in terms of total passengers carried in 2005

Country	Airport	Total air transport				National air transport		International intra-EU-25 air transport		International extra-EU-25 air transport		
		Rank	Passengers in 1000	Growth 2004-2005	Number of flights in 1000	Growth 2004-2005	Passengers in 1000	Rank	Passengers in 1000	Rank	Passengers in 1000	Rank
UK	LONDON/HEATHROW	1	67 684	0.9%	472	0.5%	6 673	8	24 740	1	36 271	1
FR	PARIS/CHARLES-DE-GAULLE	2	53 381	4.8%	543	-1.2%	5 003	14	22 018	3	26 360	2
DE	FRANKFURT/MAIN	3	51 789	2.1%	476	2.9%	7 002	6	18 758	4	26 029	3
NL	AMSTERDAM/SCHIPHOL	4	44 077	3.9%	408	0.8%	79	208	24 354	2	19 644	4
ES	MADRID/BARAJAS	5	41 725	9.4%	406	3.9%	19 462	1	12 788	9	9 475	6
UK	LONDON/GATWICK	6	32 693	4.1%	252	4.5%	3 941	20	17 235	6	11 517	5
DE	MUNCHEN	7	28 448	6.9%	382	4.5%	8 974	5	12 004	12	7 470	8
IT	ROMA/FIUMICINO	8	27 782	2.3%	300	-0.2%	12 079	4	10 045	15	5 659	12
ES	BARCELONA	9	27 017	10.9%	294	6.1%	13 141	3	11 294	13	2 582	19
FR	PARIS/ORLY	10	24 850	3.3%	231	1.2%	15 566	2	4 374	37	4 910	14
UK	MANCHESTER/INTL	11	22 083	5.3%	218	4.6%	3 388	26	12 773	10	5 923	10
UK	LONDON/STANSTED	12	21 993	5.2%	178	0.7%	2 666	35	17 962	5	1 366	30
ES	PALMA DE MALLORCA	13	21 215	4.2%	170	2.6%	5 976	10	14 638	8	601	43
DK	KOBENHAVN/KASTRUP	14	19 822	4.9%	262	-1.8%	1 536	55	12 604	11	5 682	11
IT	MILANO/MALPENSA	15	19 485	5.8%	222	6.1%	3 153	28	8 657	18	7 676	7
IE	DUBLIN	16	18 326	7.6%	170	3.4%	641	98	15 896	7	1 789	24
SE	STOCKHOLM/ARLANDA	17	17 159	5.6%	222	-5.2%	5 771	11	8 269	19	3 119	16
BE	BRUXELLES/NATIONAL	18	15 951	3.3%	229	-0.5%	1	309	11 027	14	4 923	13
AT	WIEN/SCHWECHAT	19	15 802	7.4%	227	2.7%	561	110	9 096	16	6 146	9
DE	DÜSSELDORF	20	15 390	2.0%	189	0.7%	3 603	23	7 411	21	4 377	15
EL	ATHENS	21	14 271	4.5%	170	-5.3%	5 166	13	6 785	23	2 320	20
ES	MALAGA	22	12 607	5.7%	111	8.2%	3 133	29	8 995	17	479	49
DE	BERLIN-TEGEL	23	11 475	4.5%	137	4.1%	5 580	12	4 424	36	1 471	28
PT	LISBOA	24	11 236	8.1%	126	3.4%	2 245	39	6 203	28	2 789	18
FI	HELSINKI-VANTAA	25	11 127	3.7%	163	0.0%	2 803	34	6 352	27	1 973	22
CZ	PRAHA/RUZYNE	26	10 721	12.0%	150	11.9%	95	195	7 836	20	2 790	17
DE	HAMBURG	27	10 573	8.3%	134	3.2%	4 536	16	4 438	35	1 600	26
FR	NICE/COTE D'AZUR	28	9 740	4.4%	158	2.0%	4 257	17	4 309	38	1 175	35
ES	LAS PALMAS/GRAN CANARIA	29	9 685	5.1%	98	6.2%	4 112	19	4 930	30	643	41
DE	KÖLN/BONN	30	9 385	13.8%	140	5.0%	3 436	24	4 762	31	1 187	34
HU	BUDAPEST/FERIHEGY	39	8 049	24.9%	117	12.7%	2	304	5 951	29	2 096	21
PL	WARSAWA/OKECIE	40	7 080	16.2%	131	7.2%	861	82	4 697	32	1 622	25
CY	LARNAKA	51	5 001	5.5%	48	2.6%	0	:	3 927	39	1 075	37
MT	MALTA/LUQA	78	2 757	-1.2%	30	-2.9%	8	279	2 444	57	305	62
LV	RIGA AIRPORT	96	1 872	77.3%	31	29.4%	1	317	1 589	77	282	64
LU	LUXEMBOURG/LUXEMBOURG	112	1 538	1.9%	51	0.9%	0	:	1 313	83	225	74
EE	TALLINN/ULEMISTE	119	1 393	40.6%	26	20.6%	21	253	1 192	89	180	86
LT	VILNIUS INTL	124	1 279	28.6%	26	:	1	307	1 076	94	201	81
SI	LJUBLJANA	128	1 217	16.3%	29	15.3%	0	:	786	107	431	54

Table 3: Intra-EU-25 country to country flows in 2005 (in 1000 passengers)

	BE	CZ	DK	DE	EE	EL	ES	FR	IE	IT	CY	LV	LT	LU	HU	MT	NL	AT	PL	PT	SI	SK	FI	SE	UK
BE																									
CZ	198																								
DK	437	210																							
DE	1 099	992	1 789																						
EE	21	75	126	214																					
EL	795	553	580	4 770	19																				
ES	3 308	616	1 687	21 063	26	368																			
FR	878	638	1 226	6 120	21	1 579	6 428																		
IE	444	258	195	1 212	23	141	2 801	1 452																	
IT	2 065	538	783	9 331	24	2 018	7 509	6 421	805																
CY	51	80	60	426	0	1 101	7	150	74	74															
LV	30	75	120	366	27	14	20	18	56	46	3														
LT	27	79	178	185	36	14	25	22	95	23	2	20													
LU	0	16	46	208	0	63	247	176	6	103	0	0	0												
HU	218	174	173	1 518	0	277	227	489	159	543	63	0	0	11											
MT	75	10	41	378	0	21	35	157	27	374	10	0	0	7	20										
NL	214	342	846	2 468	53	1 290	4 252	1 994	721	2 422	120	105	89	73	349	79									
AT	333	164	357	4 571	8	897	938	745	146	788	123	46	36	45	88	119	475								
PL	198	117	333	1 886	17	358	286	629	154	649	46	24	55	8	124	6	314	216							
PT	562	34	200	2 047	3	11	2 068	1 800	419	699	2	0	0	139	22	4	915	68	28						
SI	36	26	15	255	0	76	6	96	8	4	2	0	0	0	18	5	15	66	2	0					
SK	28	198	14	108	1	124	48	117	6	133	13	0	0	0	1	0	48	27	16	2	0				
FI	208	130	786	1 187	171	277	860	364	40	256	58	165	65	0	169	14	399	159	88	98	0	0	1 313		
SE	417	127	1 881	1 953	149	613	1 702	842	94	465	167	101	28	0	188	45	862	239	121	163	0	0	1 313		
UK	1 707	2 354	2 285	11 118	187	5 633	34 809	11 317	11 843	10 737	3 003	310	220	187	1 120	1 103	7 905	1 795	1 850	4 664	157	285	778	2 028	

Table 3 above displays the country to country flows within the EU-25 in 2005. As in previous years the most important country relations are Spain – United Kingdom (34.8 million passengers) and Germany – Spain (21.1 million), this reflecting the busiest holiday air flows in

Europe. These were followed by Ireland – United Kingdom (11.8 million), France – United Kingdom (11.3 million) and Germany – United Kingdom (11.1 million). There were 8 other country to country flows with over 5 million passengers (shown in bold in Table 3).

Map 1: Extra-EU-25 transport of passengers: share in world regions – in % of total extra-EU-25 transport in 2005



More than 245 million passengers arrived in or departed from the EU-25 in 2005 with an extra-EU-25 origin or destination. This represented an increase of 9% on the number for 2004.

Map 1 on the previous page and Table 4 show that the largest share of the total extra-EU-25 traffic was with countries of "Europe outside EU-25", with more than 80.3 million passengers being transported in 2005. This formed almost a third of the total (32.7%). North America followed with nearly a quarter share (22.9% - more than 56 million passengers). The strongest growth

was observed for Australasia (18.1% more passengers than in 2004) followed by South America (16.8%).

The United Kingdom was the main EU-25 partner state in the extra-EU-25 passenger market as a whole and was the main partner country in six of the eleven world regions. France was the main partner for services to the continent of Africa whilst Germany was the main partner in the Asian Republics of the Ex-USSR and Europe except EU-25. Spain was the main partner in the EU-25 – South American market.

Table 4: International extra-EU-25 passenger transport by world region in 2005

World regions	Passengers in 1000	Growth 2004-2005	Main EU-25 partners	
			Country	%
Total Extra EU-25	245 266	9.0%	UNITED KINGDOM	24.8%
Europe except EU-25	80 318	12.4%	GERMANY	27.2%
North America	56 039	5.3%	UNITED KINGDOM	39.1%
Central America and Caribbean	10 878	2.1%	UNITED KINGDOM	28.4%
South America	9 063	16.8%	SPAIN	36.6%
Asian Republics of the Ex-USSR	1 209	6.1%	GERMANY	30.6%
Near and Middle East	17 065	9.4%	UNITED KINGDOM	33.4%
Indian Sub-Continent	5 931	10.4%	UNITED KINGDOM	47.0%
Far East	23 430	7.0%	UNITED KINGDOM	25.2%
Australasia, S. Sea Is. & Antarctica	1 885	18.1%	UNITED KINGDOM	74.3%
North Africa	26 440	10.0%	FRANCE	36.3%
Rest of Africa	12 584	5.0%	FRANCE	31.4%

Airport-to-airport transport (air routes)

Table 5: Top 10 national airport pairs in the EU-25 in 2005

Rank	Airport pairs	Passengers carried in 1000	Growth 2004-2005	Number of flights in 1000	Growth 2004-2005	Capacity/Occupancy		
						Passengers on board in 1000	Seats available in 1000	Occupancy rate
1	MADRID/BARAJAS BARCELONA	4 276	6.3%	44.9	4.4%	4 682	7 246	64.6%
2	ROMA/FIUMICINO MILANO/LINATE	2 419	-5.0%	26.0	-6.0%	2 410	4 015	60.0%
3	PARIS/ORLY TOULOUSE/BLAGNAC	2 328	2.1%	19.1	2.0%	2 328	:	:
4	PARIS/ORLY NICE/COTE D'AZUR	2 264	6.7%	17.2	2.9%	2 264	:	:
5	PALMA DE MALLORCA BARCELONA	1 690	5.5%	19.0	-2.3%	1 691	2 561	66.0%
6	EDINBURGH LONDON/HEATHROW	1 659	-2.2%	14.1	1.2%	1 659	2 300	72.1%
7	PALMA DE MALLORCA MADRID/BARAJAS	1 641	3.0%	15.5	-2.4%	1 647	2 375	69.3%
8	BERLIN-TEGEL FRANKFURT/MAIN	1 546	-2.8%	12.0	-0.9%	1 549	1 997	77.6%
9	MUNCHEN HAMBURG	1 451	1.6%	14.7	-5.3%	1 458	1 948	74.8%
10	GLASGOW LONDON/HEATHROW	1 426	-7.2%	13.1	0.0%	1 426	2 021	70.5%

Table 5 shows the most important airport pairs in the EU-25 for domestic air passenger transport. These figures are shown excluding the double counting for passenger transport between the national airport pairs. As would be expected these airports are all situated in the large Member States. The Madrid/Barajas – Barcelona relation remains the largest route by far with over 4.2 million passengers. Roma/Fiumicino – Milano/Linate remained in second position despite a fall of 5% compared to 2004.

Third position was retained by Paris/Orly – Toulouse/Blagnac.

The seat occupancy rate, calculated as the ratio between the passengers on board and the seats available at the aircraft, is available for eight of the top ten national airport pairs. The top four of the eight have an occupancy rate of less than 75%. The highest occupancy rate was observed on Berlin/Tegel – Frankfurt/Main (almost 78%).

Table 6: Top 10 intra-EU-25 airport pairs in 2005

Rank	Airport pairs		Passengers carried in 1000	Growth 2004-2005	Number of flights in 1000	Growth 2004-2005	Capacity/Occupancy		
							Passengers on board in 1000	Seats available in 1000	Occupancy rate
1	DUBLIN	LONDON/HEATHROW	2 088	-0.4%	13.7	-2.2%	2 088	2 607	80.1%
2	PARIS/CHARLES-DE-GAULLE	LONDON/HEATHROW	2 011	0.7%	18.9	-4.6%	2 014	2 902	69.4%
3	AMSTERDAM/SCHIPHOL	LONDON/HEATHROW	1 895	-5.5%	16.7	-1.8%	1 896	2 645	71.7%
4	LONDON/HEATHROW	FRANKFURT/MAIN	1 527	-0.1%	12.5	0.2%	1 531	2 342	65.4%
5	ROMA/FIUMICINO	PARIS/CHARLES-DE-GAULLE	1 241	14.6%	10.6	-2.0%	1 254	1 684	74.5%
6	STOCKHOLM/ARLANDA	KOBENHAVN/KASTRUP	1 214	3.7%	12.9	3.0%	1 245	1 981	62.8%
7	DUBLIN	LONDON/STANSTED	1 123	-12.3%	8.3	-13.7%	1 123	1 435	78.2%
8	BARCELONA	AMSTERDAM/SCHIPHOL	1 111	-2.1%	8.5	-3.4%	1 116	1 428	78.2%
9	MADRID/BARAJAS	LONDON/HEATHROW	1 094	-0.3%	8.7	-2.3%	1 097	1 514	72.5%
10	PARIS/CHARLES-DE-GAULLE	AMSTERDAM/SCHIPHOL	1 039	4.6%	11.1	0.3%	1 054	:	:

Table 6 shows the most important airport pairs in intra-EU-25 air passenger transport. The top 3 routes, each with around 2 million passengers in 2005, had London/Heathrow as one partner airport; Dublin remains in top place but Amsterdam/Schiphol moved from second to third place being overtaken by Paris/Charles de Gaulle. Roma/Fiumicino–Paris/Charles de Gaulle rose from 10th to 5th place following growth

of more than 14%. In the majority of cases where growth in the number of passengers was observed, the number of flights grew at a lesser rate, or even declined. This may represent higher passenger occupancy per flight or a decline in the number of all freight/mail services. The service with the highest occupancy rate was Dublin – London/Heathrow with more than 80% of seats filled.

Table 7: Top 10 extra-EU-25 airport pairs in 2005

Rank	Airport pairs		Passengers carried in 1000	Growth 2004-2005	Number of flights in 1000	Growth 2004-2005	Capacity/Occupancy		
							Passengers on board in 1000	Seats available in 1000	Occupancy rate
1	LONDON/HEATHROW	NEW YORK/JOHN F. KENNEDY INTL, NY.	2 940	-0.9%	13.6	-1.6%	3 085	4 171	74.0%
2	PARIS/CHARLES-DE-GAULLE	NEW YORK/JOHN F. KENNEDY INTL, NY.	1 730	9.8%	9.8	7.6%	1 730	:	:
3	LONDON/HEATHROW	CHICAGO/O'HARE, IL.	1 522	0.7%	7.9	-1.1%	1 617	2 186	74.0%
4	LONDON/HEATHROW	LOS ANGELES/INTL, CA.	1 383	2.7%	5.9	5.7%	1 570	1 891	83.0%
5	LONDON/HEATHROW	HONG KONG/INTL	1 258	-1.4%	5.3	15.3%	1 524	1 790	85.1%
6	LONDON/HEATHROW	DUBAI/INTL	1 183	4.8%	6.4	7.5%	1 385	1 957	70.8%
7	KOBENHAVN/KASTRUP	OSLO/GARDERMOEN	1 150	-5.2%	12.8	7.4%	1 250	2 014	62.1%
8	LONDON/HEATHROW	WASHINGTON/DULLES INTL, DC.	1 074	-0.6%	5.3	-1.1%	1 074	1 360	79.0%
9	LONDON/HEATHROW	TORONTO/LESTER B. PEARSON INTL.	1 067	-0.8%	4.9	-0.2%	1 068	1 216	87.8%
10	LONDON/HEATHROW	SAN FRANCISCO/INTL, CA.	1 005	-2.9%	3.7	0.7%	1 005	1 177	85.4%

The top five routes between EU-25 and Extra-EU-25 airports remained the same as in 2004, four of them involving London/Heathrow and with Paris/Charles de Gaulle – New York/JFK remaining in second place despite growth of almost 10%. Whilst the Extra – EU-25 market grew by 9.5% in total, more than half of the routes featured in the top ten recorded a fall in passenger numbers and only one exceeded the average level of growth in the market as a whole.

Seat occupancy rates were able to be calculated for nine of the top ten extra-EU-25 airport pairs. Of these, four airport pairs recorded seat occupancy rates of more than 80%; London/Heathrow–Toronto, London/Heathrow–San Francisco/Intl, London/Heathrow – Hong Kong/Intl and London/Heathrow – Los Angeles/Intl. The lowest occupancy rate was observed on Kobenhavn/Kastrup – Oslo/Gardemoen which was the only short-haul airport pair represented in the top ten routes.

Air freight and mail transport in the EU-25

Table 8: Overview of EU-25 freight and mail air transport by Member State in 2005

	Total transport		National transport		International intra-EU-25 transport		International extra-EU-25 transport	
	Freight and mail (tonnes)	Growth 2004-2005	Freight and mail (tonnes)	Growth 2004-2005	Freight and mail (tonnes)	Growth 2004-2005	Freight and mail (tonnes)	Growth 2004-2005
BELGIUM	694 523	4.7%	178	-63.5%	250 327	0.2%	444 018	7.6%
CZECH REPUBLIC	56 259	-2.2%	1 235	185.2%	33 339	-3.5%	21 685	-3.8%
DENMARK	7 465	-5.8%	886	142.1%	4 767	5.7%	1 812	-40.6%
GERMANY	3 005 967	7.9%	103 951	-15.5%	609 299	0.9%	2 292 717	11.4%
ESTONIA	9 739	94.9%	0	:	5 333	16.4%	4 406	954.1%
GREECE	105 502	-5.5%	16 389	-7.6%	61 926	-6.1%	27 187	-2.5%
SPAIN	526 125	1.1%	129 919	3.5%	181 437	-2.0%	214 769	2.3%
FRANCE	1 476 721	-0.6%	172 176	-3.9%	215 614	-5.3%	1 088 931	1.0%
IRELAND	89 356	43.7%	10 516	38.5%	40 118	101.7%	38 722	11.7%
ITALY	754 302	-3.8%	71 581	-40.3%	268 667	-1.7%	414 054	6.0%
CYPRUS	39 220	5.5%	2	:	31 062	11.0%	8 156	-11.3%
LATVIA	15 428	85.3%	0	:	4 252	12.7%	11 176	145.4%
LITHUANIA	9 580	84.8%	2	:	6 011	21.8%	3 567	1344.1%
LUXEMBOURG	624 803	1.3%	0	:	70 317	6.5%	554 486	0.7%
HUNGARY	55 472	-8.2%	0	:	33 522	7.8%	21 950	-25.2%
MALTA	16 891	5.9%	0	:	12 324	3.5%	4 567	13.0%
NETHERLANDS	1 550 736	2.6%	0	15.9%	53 818	-17.3%	1 496 918	3.5%
AUSTRIA	181 533	13.7%	1 004	2.0%	54 622	-2.7%	125 907	22.8%
POLAND	31 130	-0.9%	3 469	-22.8%	14 701	11.3%	12 960	-5.6%
PORTUGAL	129 516	5.0%	25 514	15.1%	60 307	-3.8%	43 695	13.6%
SLOVENIA	4 549	-8.7%	5	:	3 001	-5.7%	1 543	-14.3%
SLOVAKIA	4 069	-50.4%	22	-57.7%	1 220	-27.4%	2 827	-56.3%
FINLAND	119 569	-3.2%	4 948	-5.6%	60 826	-10.2%	53 795	6.5%
SWEDEN	:	:	:	:	:	:	:	:
UNITED KINGDOM	2 450 838	-0.8%	133 961	0.5%	447 817	-1.8%	1 869 060	-0.7%
EUROPEAN UNION	10 953 661	3.5%	675 758	-10.4%	1 518 996	9.9%	8 758 907	3.7%

Table 8 gives an overview of EU-25 freight and mail air transport by Member States. The figures for national transport are reported excluding the double counting between national partner airports. In parallel, the aggregate EU-25 figures shown under international intra-EU-25 transport and total transport also exclude the double counting between EU-25 partner airports. In addition, the EU aggregates do not include freight data reported by Sweden, as this information is not available for 2005. Finally, the data reported for Denmark do not include the freight transport of Kobenhavn/Kastrup airport.

In 2005 air freight and mail grew by 3.5%, much less than air passenger traffic which grew by 8.5% in the same period. Air freight carried on domestic air services fell by more than 10%, perhaps reflecting increased competition from road and rail.

German airports handled the greatest volume with 3.0 million tonnes carried, followed by the United Kingdom with 2.5 million tonnes. The Netherlands and France, with around 1.5 million tonnes each, were the only other countries in the EU-25 recording over a million tonnes. These four countries carried 71% of the total freight

transport. The strongest growth was recorded by the new Member States. Twelve Member States reported a fall in tonnage handled.

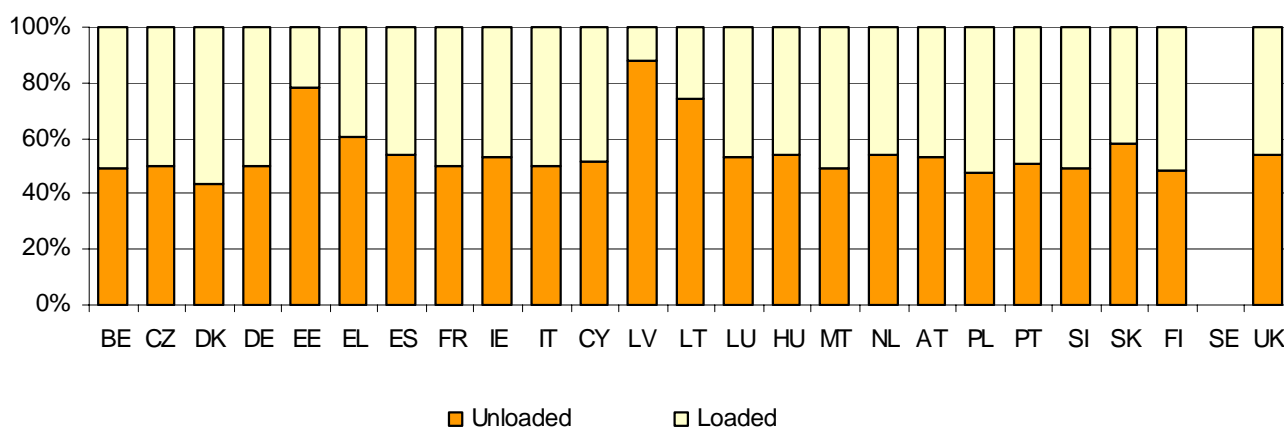
International extra-EU-25 freight transport was the largest segment of the market accounting for almost 80% of total EU-25 freight transport in 2005. Germany, the United Kingdom, the Netherlands and France remained predominant in the market, each carrying over one million tonnes. As for total freight transport, these 4 countries carried over 77% of the extra-EU-25 total.

These four countries were also dominant in international intra-EU-25 freight transport (which accounted for 14% of all freight and mail transport by air in the EU-25). Ireland reported a particularly strong growth, doubling the volume of air freight and mail handled in this market.

National transport formed only 6% of the total EU-25 freight transport; one percentage point less than in 2004. France was the largest market.

The volume of freight transported by air to/from or within the new Member States remains relatively low in comparison with most of the other countries.

Graph 2: Share of loaded and unloaded total freight and mail air transport by Member State in 2005



For most Member States, the share of total freight between loaded and unloaded was fairly balanced, as is shown in Graph 2. Exceptions where freight unloaded was greater were Latvia (more than 80% unloaded) and Estonia and Lithuania (more than 75% unloaded) suggesting that more imports were transported by air than exports.

Table 9 shows the top 20 airports in the EU-25 in terms of freight and mail carried in 2005 together with the rank of the top airport for 12 Member States where no airport appeared in the top 20 (Slovakia is excluded). Increased growth in traffic was recorded for all but 6 of the top 20 airports. Frankfurt/Main was the top airport

with 2.0 million tonnes followed by Amsterdam/Schiphol, London/Heathrow and Paris/Charles-de-Gaulle; all carrying over one million tonnes of freight. The ability to carry freight on the many passenger routes flown from these airports explains the dominant position of these four airports. However, within the top 20 shown in Table 9 are airports where their rank position is due to specialization in the transport of freight by air. Of note is the 6th position for Cologne/Bonn, 7th for Luxembourg and 10th for East Midlands in the United Kingdom. Hahn airport appeared in the rank for the first time following growth of more than 50% over 2004.

Table 9: Top airports in the EU-25 in terms of total freight and mail carried in 2005

Rank	Country	Airport	Freight and mail (tonnes)			Growth 2004-2005
			Loaded	Unloaded	Total	
1	DE	FRANKFURT/MAIN	976 111	974 499	1 950 610	6.7%
2	NL	AMSTERDAM/SCHIPHOL	699 231	796 330	1 495 561	1.9%
3	UK	LONDON/HEATHROW	640 964	748 314	1 389 278	-1.6%
4	FR	PARIS/CHARLES-DE-GAULLE	617 996	599 800	1 217 796	-4.5%
5	BE	BRUXELLES/NATIONAL	352 760	341 763	694 523	5.2%
6	DE	KÖLN/BONN	325 270	321 564	646 833	4.0%
7	LU	LUXEMBOURG/LUXEMBOURG	293 473	331 330	624 803	1.3%
8	IT	MILANO/MALPENSA	191 429	192 360	383 789	6.4%
9	ES	MADRID/BARAJAS	191 168	169 144	360 312	2.1%
10	UK	NOTTINGHAM EAST MIDLANDS	144 706	147 443	292 149	5.4%
11	UK	LONDON/STANSTED	107 678	147 133	254 812	6.6%
12	UK	LONDON/GATWICK	122 888	109 196	232 084	2.3%
13	DE	MÜNCHEN	111 983	106 208	218 191	13.4%
14	AT	WIEN/SCHWECHAT	83 919	96 064	179 983	13.8%
15	UK	MANCHESTER/INTL	58 152	91 816	149 967	-2.2%
16	IT	BERGAMO/ORIO AL SERIO	73 135	61 969	135 104	4.2%
17	IT	ROMA/FIUMICINO	64 967	66 968	131 935	-5.5%
18	FI	HELSINKI-VANTAA	59 415	55 445	114 860	-2.7%
19	DE	HAHN	47 833	53 110	100 943	52.8%
20	EL	ATHENS	43 701	57 041	100 741	-3.2%
21	PT	LISBOA	51 197	48 826	100 023	5.0%
25	IE	DUBLIN	28 495	35 618	64 113	89.3%
27	HU	BUDAPEST/FERIHEGY	25 342	30 130	55 472	-8.2%
31	CZ	PRAHA/RUZYNE	24 630	26 982	51 612	0.0%
36	CY	LARNAKA	17 707	20 144	37 851	4.8%
40	PL	WARSAWA/OKECIE	16 206	14 924	31 130	-0.9%
53	MT	MALTA/LUQA	8 533	8 358	16 891	5.9%
55	LV	RIGA AIRPORT	1 886	13 542	15 428	85.3%
72	EE	TALLINN/ULEMISTE	2 082	7 657	9 739	94.9%
94	LT	VILNIUS INTL	1 956	3 297	5 253	1.4%
101	DK	BILLUND	3 268	1 416	4 684	-18.6%
103	SI	LJUBLJANA	2 312	2 237	4 549	-8.7%

Table 10 shows the share by world region of international extra-EU-25 freight transport, which formed 80% of all air freight handled at EU-25 airports in 2005. Growth was recorded in all markets except for North America which fell by 2%. The highest increase of nearly 45% was for the Asian Republics of the Ex-USSR.

The three most important markets were North America with 2.6 million tonnes (30% of the total), followed by the Far East and Near and Middle East with 2.4 and 1.2 million tonnes respectively.

Overall the balance between tonnes loaded and unloaded was fairly equal but there were marked differences within some regions. More than 71% of air freight from the Asian Republics of the Ex-USSR was unloaded, suggesting a strong level of imports. In contrast, only 39% of the tonnage from Central America and Caribbean was unloaded suggesting a strong level of exports. Overall the balance of freight unloaded at all reporting airports was 53%.

Table 10: International extra-EU-25 freight and mail transport by world region, 2005 (in tonnes)

World regions	Loaded	Unloaded	Total	Growth 2004-2005		Share in total extra-EU-25
				Total		
Total Extra EU	4 145 288	4 613 619	8 758 907		3.7%	100.00%
North America	1 369 120	1 225 237	2 594 357		-2.0%	29.62%
Far East	1 025 965	1 411 454	2 437 419		7.3%	27.83%
Near and Middle East	574 545	630 255	1 204 800		4.3%	13.76%
Rest of Africa	317 965	374 355	692 320		3.5%	7.90%
Europe other than EU	215 214	202 301	417 515		0.9%	4.77%
South America	177 813	217 705	395 518		3.8%	4.52%
Indian Sub-Continent	145 000	207 269	352 270		4.9%	4.02%
Asian Republics of the Ex-USSR	59 303	148 377	207 679		44.6%	2.37%
North Africa	107 154	83 155	190 309		1.4%	2.17%
Central America and Caribbean	102 026	66 090	168 116		6.7%	1.92%
Australasia, S. Sea Is. & Antarctica	49 472	45 014	94 486		21.3%	1.08%
Unknown	1 711	2 407	4 118		-50.5%	0.05%

Air transport in the accession and candidate countries

Table 11: Overview of air transport in Bulgaria, Croatia, Romania and Turkey

	Passenger transport in 1000						Freight and mail transport in tonnes					
	Total transport		National transport		International transport		Total transport		National transport		International transport	
	2005	Growth 2004-2005	2005	Growth 2004-2005	2005	Growth 2004-2005	2005	Growth 2004-2005	2005	Growth 2004-2005	2005	Growth 2004-2005
BULGARIA	5 023	16.2%	:	:	:	:	16 845	-1.9%	:	:	:	:
CROATIA	3 916	18.7%	:	:	:	:	18 109	82.3%	:	:	:	:
ROMANIA	3 494	9.4%	274	30.6%	3 220	7.9%	17 980	-7.0%	0	-42.7%	18	-6.3%
TURKEY	53 516	20.6%	:	:	:	:	333 511	1.7%	:	:	:	:

Turkish airports recorded 53.5 million passengers (a 20.6% increase compared to 2004) continuing a run of strong growth. The transport of 333 thousand tonnes of freight in 2005 also makes Turkey an important player in this field.

Bulgaria reported 5.0 million passengers in 2005, a 16.2% increase compared to 2004, continuing the growth registered the previous year (20.9%). The increasing number of tourists flying to the Bulgarian Black Sea coast continues to play a significant role within these figures.

In 2005, Croatia reported about 3.9 million passengers, an increase of 18.7% compared to 2004. Croatia registered a particularly strong growth in freight and mail transport: more than 82% with 18.1 thousand tonnes handled in 2005.

Air passenger transport in Romania increased by 9.4% in 2005 with a total of 3.5 million passengers handled. Regarding the tonnage of freight handled at Romanian airports (18 thousand tonnes), a fall of 7% compared to 2004 was registered.

Table 12 shows traffic at the principal airports of the accession and candidate countries. The three main airports in Bulgaria continued their rapid growth in passenger numbers noted over the last two years increasing the passenger volumes by at least 15% in 2005. Sofia was by far the most important airport for

freight, transporting 99% of the total freight traffic reported by Bulgaria in 2005.

In Romania, Bucharest airport continued to dominate air transport although the other two main airports registered very high growth rates for the second consecutive year. In 2005, Bucharest reported 81% of the passenger traffic and 94% of the freight transport of Romania.

Table 12: Top 3 airports in Bulgaria, Croatia, Romania and Turkey

Major airports	Passengers		Freight and mail		
	2005 (in 1000)	Growth 2004-2005	2005 (in 1000)	Growth 2004-2005	
BG SOFIA	1 856	16.4%	14 725	1.8%	
	BURGAS	1 556	15.0%	122	-86.4%
	VARNA	1 547	15.7%	19	-86.0%
HR ZAGREB	1 536	10.5%	12 032	56.4%	
	DUBROVNIK	1 058	22.8%	677	-17.4%
	SPLIT	904	17.5%	:	:
RO BUCURESTI/OTOPENI	2 977	14.5%	17 114	4.0%	
	TIMISOARA/GIARMATA	484	73.2%	800	-7.2%
	CLUJ-NAPOCA/SOMESENI	201	23.4%	213	54.3%
TR ISTANBUL/ATATURK	19 294	23.7%	274 280	2.9%	
	ANTALYA	15 865	16.2%	6 932	3.0%
	ANKARA/ESEBOGA	3 830	16.9%	23 938	-11.3%

The three main airports in Croatia recorded an increase in number of passengers in 2005. The total number of passengers in Dubrovnik airport grew by nearly 23% while the volume of freight and mail handled decreased by 17%. In 2005, Zagreb airport more than doubled the volume of freight and mail handled.

In Turkey, an increase in passenger transport of 24% in 2005 was recorded for Istanbul/Ataturk. Antalya also

saw strong growth (16%). These two airports accounted for two-thirds of air passengers reported by Turkey.

The Freight and mail traffic at Istanbul/Ataturk airport, which increased by almost 3%, was 82% of the total reported by Turkey in 2005.

Air transport in Iceland, Norway and Switzerland

Table 13: Overview of air transport in Iceland, Norway and Switzerland

	Passenger transport in 1000						Freight and mail transport in tonnes					
	Total transport		National transport		International transport		Total transport		National transport		International transport	
	2005	Growth 2004-2005	2005	Growth 2004-2005	2005	Growth 2004-2005	2005	Growth 2004-2005	2005	Growth 2004-2005	2005	Growth 2004-2005
IS	2 951	9.3%	:	:	:	:	62 969	6.4%	:	:	:	:
NO ¹	23 459	:	11 700	:	11 759	:	95 696	:	31 255	:	64 441	:
CH	28 876	8.7%	745	0.6%	28 131	8.9%	334 024	4.7%	5 866	-10.5%	328 158	5.0%

1) Provisional data estimated from Avinor published figures. Passenger data are based on arrival and departures excluding transit passengers for international transport

Passenger transport in Switzerland continued to recover and a growth of 8.7% was observed almost entirely due to the increase of international transport. Zurich airport grew by 4.3% whilst Geneva/Cointrin grew by 9.3% and Bale recorded a growth of more than 60%. More than 60% of the air freight of Switzerland was handled at Zurich, which recorded a 7.3 % growth in volume, more than the national average growth of 4.7%.

Although 2004-2005 growth figures are not shown for Norway, Avinor has reported a growth in air passenger and freight transport in this country. The domestic market features heavily in Norway, accounting for 50% of all passenger traffic and for 33% of all freight and mail transport. Oslo/Gardermoen is by far the busiest airport in Norway, both in terms of passengers and freight. The other two Norwegian airports in the top three are Bergen and Trondheim.

In 2005 the Iceland passenger numbers were just over 2.9 million, an increase of 9% compared to 2004. Freight transport increased by 6% to 63 thousand tonnes. Keflavik airport registered 79% of passengers and 96% of freight reported by Iceland in 2005.

Table 14: Top 3 airports in Iceland, Norway and Switzerland

Major airports	Passengers		Freight and mail	
	2005 (in 1000)	Growth 2004-2005	2005 (in 1000)	Growth 2004-2005
IS KEFLAVIK REYKJAVIK AD AKUREYRI	2 111	11.8%	59 650	6.0%
	381	0.6%	1 256	-5.5%
	179	2.6%	1 008	87.0%
NO ¹ OSLO/GARDERMOEN BERGEN/FLESLAND TRONDHEIM/VAERNES	15 863	:	84 272	:
	3 674	:	7 259	:
	2 932	:	5 532	:
CH ² ZURICH GENEVE/COINTRIN BALE	17 878	4.3%	269 799	7.3%
	9 360	9.3%	38 774	-3.6%
	2 033	60.2%	30 892	-8.7%

1) Provisional data estimated from Avinor published figures. Passenger data are based on arrival and departures excluding transit passengers for international transport

2) Bale airport data includes only Swiss traffic

➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

Data sources

All figures presented in this publication have been extracted from the Eurostat aviation database, except those corresponding to Norway. 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 used 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 on board: All passengers on board of the aircraft upon landing at the reporting airport or at taking-off from the reporting airport. This includes direct transit passengers.

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.

Passenger seats available: The total number of passenger seats for sale on an aircraft operating a flight stage between pair of airports.

Freight and mail loaded or unloaded: All freight and mail loaded onto or unloaded from an aircraft. This 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.

Belgium: Because of derogations granted to other airports Belgian data refer to Brussels and Charleroi airports only, in 2004 and 2005.

Denmark: Freight and mail data are not available for Kobenhavn/Kastrup airport in 2004 and 2005.

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

Ireland: Because of derogations granted to other airports Irish 2004 data refer to Dublin, Shannon and Cork airports.

Italy: Data for 2005 are provisional.

Latvia: Latvian data refer to Riga airport only.

Lithuania: In 2004, Lithuanian data refer to Vilnius Intl. airport only. In 2005, data for Kaunas and Palanga airports have been added.

Hungary: Hungarian data refer to Budapest/Ferihegy airport only.

Luxembourg: Luxembourg only provided Flight Stage data.

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 and 2005 data refer to Warszawa/Okecie airport only.

Slovenia: Slovenian data refer to Ljubljana airport only.

Slovakia: Slovakia provided data at country level only.

Sweden: Due to derogations granted to several Swedish airports for the provision of OFOD declarations, the Swedish Flight Stage declarations have been used. In 2005 Sweden did not report freight and mail data.

Bulgaria: Bulgaria provided only airport declarations.

Croatia: Croatia provided only airport declarations.

Turkey: Turkey provided only airport declarations.

Iceland: For Iceland airport declarations have been used.

Norway: Provisional data for 2005 estimated from Avinor published figures. Passenger data are based on arrival and departures excluding transit passengers for international transport

National transport

The national aggregates have been calculated excluding double counting

International intra-EU-25 aggregates

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

Table 3

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

Tables 4 and 10

The component countries comprising the world regions as defined for Tables 4 and 10 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 5 and 6

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

Tables 5, 6 and 7

When the necessary information was available at route level, the occupancy rates have been calculated as the ratio between the passengers on board and the passenger seats available provided by the reporting countries.

Table 8

The Totals EU-25 do not include Sweden which did not provide freight and mail data in 2005.

In this publication

":" means "not available"

This publication was prepared with the assistance of Manuel Da Silva, Marion Biré (data) and Philip Osler (commentary).

Further information:

Data: [EUROSTAT Website/Home page/Transport/Data](#)

Air transport

 **Air transport measurement - passengers**

 **Air transport measurement - freight and mail**

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

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