

# Air Transport in the Candidate Countries 1995-2000

*Different features characterise the MED and the PHARE CC's*

Vincent Tronet

Fig. 1: Airport arrivals and departures of passengers in PHARE CC's in 2000, share by country

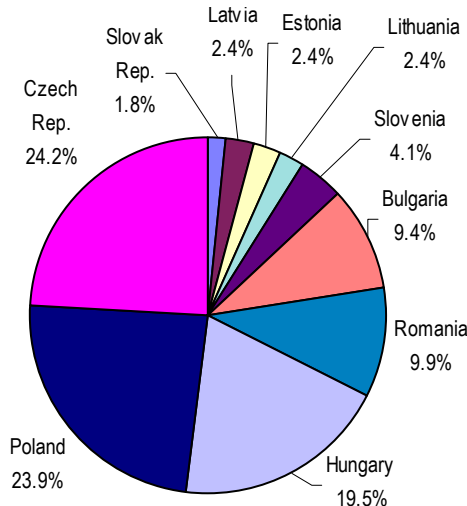


Table1: TOP 10 airports in the PHARE CCs and the main airport in each MED CC in 2000 (in 1000 passengers carried)

1 Praha / CZ	5 553.5
2 Budapest / HU	4 696.8
3 Warszawa / PL	4 325.8
4 Bucuresti / RO	1 816.1
5 Sofia / BG	1 127.6
6 Ljubljana / SI	991.0
7 Riga / LV	574.9
8 Tallinn / EE	559.8
9 Vilnius / LT	522.3
10 Krakow / PL	494.7
Istanbul/Ataturk / TR	15 969.0
Larnaca / CY	4 957.6
Malta Intl / MT	2 951.0

## Highlights

With 39 major airports, the Candidate Countries (CCs) handled the arrival and departure of over 68 million passengers, more than half a million tonnes of freight and mail and a little under a million aircraft movements in 2000.

Passenger air traffic has increased by 32% in the CCs since 1995. Growth was recorded in all countries, with average annual growth rates ranging from 0.6% to 11.9%.

In terms of numbers, the ten PHARE Candidate Countries accounted for 24 million passengers and the three MED CCs for 44 million with the major Turkish airports handling 35 million. Within the total, international traffic is dominant. In most countries, air traffic is served by a single major airport.

Istanbul/Ataturk (Turkey) with 16 million passengers was by far the busiest airport in the CCs, followed by Antalya (Turkey) 7.5 million, Prague (Czech Republic) 5.6 million and Larnaca (Cyprus) 5 million.

*The content of this "Statistics in Focus" is based on the results from activities carried out in the framework of the PHARE Multi-Country Statistical Co-operation – Management of Pilot Projects financed by the European Commission.*

*The Pilot Project on Aviation and Maritime transport statistics was carried out to assist the PHARE Candidate Countries in adjusting their statistical system to gradually comply with the EC requirements in this field. The first step in this process was an analysis the existing system and an assessment of its degree of comparability with EU standards and data transmission requirements..*

*Information relating to Candidate Countries other than the PHARE group (Cyprus, Malta and Turkey) has been mainly extracted from the MED-TRANS database which is updated yearly within the framework of the European Commission's statistical co-operation with Mediterranean countries.*

## Statistics in focus

### TRANSPORT

THEME 7 – 6/2002

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## General development

In 2000, 39 major airports (those with traffic of more than 100 000 passengers a year) in the Candidate Countries handled 68 million passenger movements.

Turkey, the largest of the CCs, recorded 35 million passenger movements and Cyprus 6 million. The Czech Republic and Poland handled a little under 6 million passengers each, both exploiting the increasing tourist potential of their countries and, in the case of the Czech

Republic, building up Prague Airport as a hub for many destinations in the Central European countries and beyond. The Czech Republic and Poland together accounted for nearly half the total of passenger arrivals and departures in the PHARE CCs. Hungary had a little over 4.5 million passengers with Malta, Romania and Bulgaria recording over 2 million.

## International and national air transport in the Candidate Countries

International traffic far outweighs national traffic in the Candidate Countries. Only in Turkey does national traffic, at 38%, exceed one third of the total. In the Central European Candidate Countries, only in Poland and Romania did national traffic reach more than 10% of the total. On average, the largest airport in each country accounted for 82% of total passenger movements. Indeed, most of the Candidate Countries have a single major airport. The exceptions are Turkey with 14, Poland with 6, Bulgaria and Romania with 3 and the Slovak Republic and Cyprus with 2. In all these countries, the share of the largest airport was below average. In Bulgaria, for example,

Sofia Airport accounts for less the half the total passenger movements. In contrast, despite their being 6 major airports in Poland, Warsaw Airport handles around three quarters of the total.

Most Candidate Countries record very few direct transit passengers, i.e. passengers arriving at an airport and continuing their journey on the same aircraft, using the same flight number. Romania registered over 180 thousand direct transit passengers, some 8% of the total Romanian traffic while Turkey handled over 1.5 million or just under 5%.

**Table 2: National and international passenger transport by air and major airports, 2000**

	Number of passengers				Main airport		
	Arrivals and departures (1000)	Direct transit (1000)	International passengers (1000)	National passengers (1000)	Airport name	Share of national total (%)	N° airports >100000 pass.
Bulgaria	2 255.1	30.3	2 093.1	154.7	Sofia	49	3
Czech Rep.	5 821.6	42.6	5 691.0	130.6	Praha / Ruzyne	95	3
Estonia	577.6	:	558.5	19.1	Tallinn	97	1
Latvia	575.8	0.5	576.3	:	Riga	100	1
Lithuania	580.9	17.3	597.4	0.8	Vilnius	87	1
Hungary	4 696.8	:	4 696.8	:	Budapest/Ferihegy	100	1
Poland	5 732.9	:	4 696.3	1 036.6	Warsaw	75	6
Romania	2 379.1	182.4	2 247.4	314.1	Bucharest/Otopeni	73	3
Slovak Rep.	429.6	:	398.3	31.2	Bratislava	66	2
Slovenia	986.0	5.0	991.0	:	Ljubljana	100	1
All PHARE CCs	24 035.2	:	22 546.5	:		85	22
Cyprus	6 125.2	16.5	:	:	Larnaca	77	2
Malta	2 912.7	38.3	2 951.0	:	Malta Intl	100	1
Turkey	34 972.5	1 592.8	21 633.5	13 339.0	Istanbul / Ataturk	44	14
All MED CCs	44 010.5	1 647.6	:	:			17
<b>All CCs</b>	<b>68 045.7</b>					<b>82</b>	<b>39</b>

## The busiest Candidate Country airports

Istanbul/Ataturk airport with some 16 million passengers was by far and away the largest Candidate Country airport followed by Antalya with 7.5 million passengers, with both airports in Turkey. Among the rest was Prague, the busiest PHARE country airport, with 5.6 million, Larnaca (Cyprus)

with 5 million, Budapest with 4.7 million, Warsaw with 4.3 million and Malta with 3 million.

While for most countries, the largest airport was situated in the capital, this was not the case for Ankara (Turkey) where traffic reached some 4 million passengers.

## Trends in aviation 1995-2000

All CCs recorded a growth in passenger numbers between 1995 and 2000. Poland achieved the fastest growth at close to 12% a year over the period. Hungary, Slovenia, Estonia, the Slovak Republic and the Czech Republic recorded growth rates between 8 and 10% a year. There was slower growth in Cyprus, Romania, Turkey and Malta. Bulgaria recorded the lowest growth at 0.6% a year. As a whole, the PHARE CCs saw an annual average growth rate of about 7.7%, compared with 4.6% for the MED CCs. The picture for freight and mail was more mixed. In 2000, Turkey with over 275 000 tonnes achieved the highest volume, followed by Poland (61 000), Hungary (43 000),

the Czech Republic (38 000) and Cyprus (33 000). Growth rates in Estonia and Hungary exceeded 13% a year while Poland recorded around 10% a year. Bulgaria, Lithuania, Cyprus and the Slovak Republic saw freight and mail volumes fall.

In terms of flight movements, Turkey with 330 000 registered the largest figure followed by Poland (156 000) and the Czech Republic (117 000). Between 1995 and 2000, the annual average growth rate in flight numbers exceeded 17% a year in Poland and was between 8 and 11% in Estonia, Hungary and Lithuania. Only Bulgaria recorded a fall over the period.

**Table 3: Development of airport transport in the Candidate Countries between 1995 and 2000**

	Total number of passengers (1000)			Freight & mail (loaded and unloaded,1000 t)			Flight movements (1000)		
	1995	2000	Aver. ann. growth %	1995	2000	Aver. ann. growth %	1995	2000	Aver. ann. growth %
Bulgaria	2 217	2 285	0.6	26.4	17.3	-8.1	41.4	40.7	-0.3
Czech Rep.	3 872	5 822	8.5	34.8	37.8	1.7	92.7	116.7	4.7
Estonia <sup>(1)</sup>	367	560	8.8	2.5	4.7	13.5	13.8	23.3	11.0
Latvia <sup>(2)</sup>	505	576	2.7	3.9	4.7	3.5	16.4	18.4	2.9
Lithuania <sup>(3)</sup>	421	581	6.7	18.0	12.4	-7.1	17.6	26.4	8.4
Hungary	2 936	4 697	9.9	23.2	43.5	13.4	26.2	40.2	9.0
Poland	3 274	5 733	11.9	38.3	61.2	9.9	70.4	156.3	17.3
Romania <sup>(4)</sup>	2 079	2 379	4.6	13.3	15.3	4.7	:	58.3	:
Slovak Rep.	284	430	8.6	4.9	4.5	-1.4	35.1	41.3	3.3
Slovenia	638	991	9.2	6.6	7.0	1.2	17.9	21.3	3.6
All PHARE CCs	16 592	24 053	7.7	172	208	3.9	:	543	:
Cyprus	4 665	6 125	5.6	39.7	33.5	-3.4	44.3	53.1	3.7
Malta <sup>(5)</sup>	2 447	2 951	3.2	10.1	13.7	5.1	26.5	29.2	3.2
Turkey	28 032	34 973	4.5	184.3	277.7	8.5	278.4	329.5	3.4
All MED CCs	35 144.4	44 048.6	4.6	234.2	324.9	6.8	349	411.7	3.3
<b>All CCs</b>	<b>51 736.6</b>	<b>68 101.9</b>	<b>5.7</b>	<b>406.1</b>	<b>533.3</b>	<b>5.6</b>	<b>:</b>	<b>954.7</b>	<b>:</b>

<sup>(1)</sup> Estonia: all data for Tallinn Airport only. There were 30234 aircraft movements at Estonian airports overall in 2000. <sup>(2)</sup> Latvia: 1996 data instead of 1995 for flight movements.

<sup>(3)</sup> Lithuania: Passenger data is for arrivals and departures only. <sup>(4)</sup> Romania: 1997 data for passengers and freight in place of 1995. Freight data is international traffic only.

<sup>(5)</sup> For Malta 1994 data instead of 1995 for passengers and freight. For flight movements, 1997 data replaces 1995.

## Performance of the main national air carriers

Looking at the performance of the main national air carriers in 2000, Turkey led the way, with nearly 12 million passengers carried, followed by the Czech Republic with 3.5 million, Poland with 2.9 million and Hungary with 2.5 million. In terms of passenger kilometres, Turkey was again

in the lead with over 16 billion passenger kilometres, followed by Poland (6 billion), the Czech Republic (5.9 billion), Hungary (3.5 billion) and Cyprus (2.8 billion). Turkish airlines carried over a million tonnes of freight, substantially more than any other Candidate Country.

**Table 4: Transport performance of the main national air carriers in the CC's, 2000**

	Passengers carried (1000)	Passenger km (1000 million)	Freight & mail carried (1000 t)	Tonne-km (million)	Number of flights
Bulgaria	1 261	2.26	22.0	46.0	:
Czech Rep.	3 484	5.86	19.0	37.8	52 530
Estonia	333	0.30	5.7	5.4	:
Latvia	218	:	:	:	7 999
Lithuania	343	0.46	3.3	4.1	14 226
Hungary	2 476	3.54	22.0	59.7	:
Poland	2 900	6.00	28.0	87.5	:
Romania	:	:	:	:	:
Slovak Rep.	159	0.25	0.7	0.2	:
Slovenia	866	0.87	4.6	4.5	:
Cyprus	1 452	2.80	18.4	:	12 567
Malta <sup>(1)</sup>	1 649	:	:	:	:
Turkey <sup>(2)</sup>	11 951	16.74	1 142.0	1 871.9	94 211

<sup>(1)</sup> 1999 data for Malta <sup>(2)</sup> Figures for Turkish Airlines only. Cargo, excess and free baggage are included.

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This publication was established with the assistance of Aline Pennisi and Jelle Bosch.

ORIGINAL: English

Layout: Marie-Anne Delisé.

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