



Statistics in focus

TRANSPORT

THEME 7 – 2/2003

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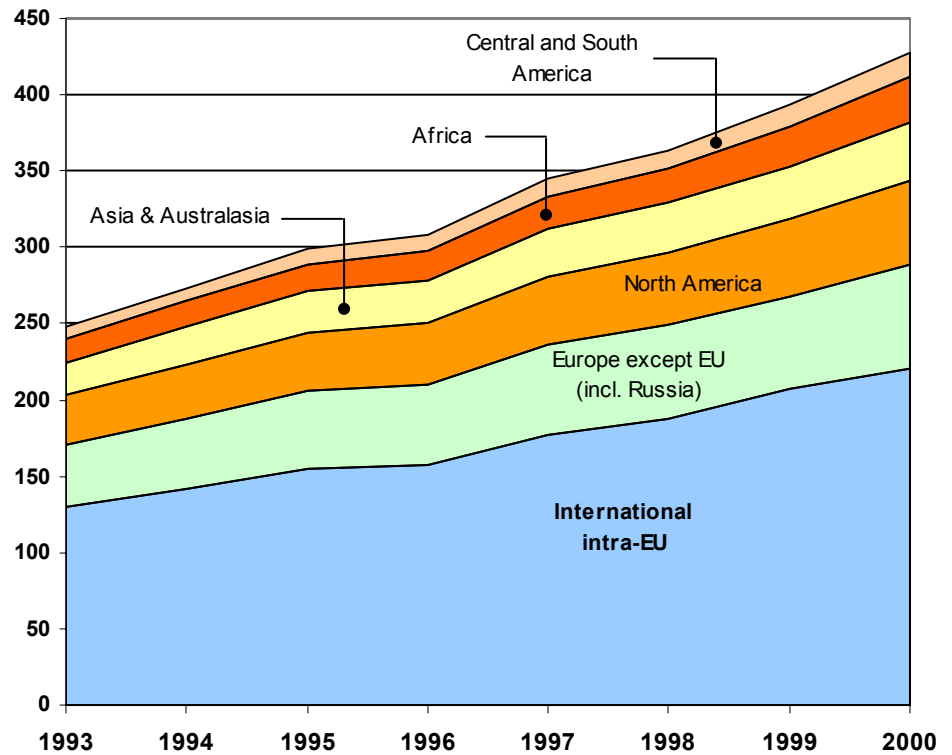
Manuscript completed on: 06.03.2003
ISSN 1562-1324
Catalogue number: KS-NZ-03-002-EN-N
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International air transport of passengers 1993-2000

*Year 2000 - Last year of substantial increase of
International passengers in EU countries*

Vincent Tronet

Graph 1 : Development of international passenger air transport by world region between 1993 and 2000 – in million passengers



Main developments

The number of international passengers carried from or to EU Member States in 2000 was 434 million – an increase of 8.7 % compared to 1999 (international intra-EU transport increased by 6.8 %, international extra-EU transport by 10.7 %).

Year 2000 was therefore the last year of substantial increase before the events of September 2001 which have significantly affected the airline industry.

On average, 51 % of this total was international intra-EU transport, 16 % transport with non-EU Europe, nearly 13 % transport with North America and the remaining 20 % represented transport relations with the rest of the world.

12 % of the total international intra-EU passenger volume in 2000 represented movements between the UK and Spain (both directions) alone, 9 % between Germany and Spain (both directions). 43 % of this total intra-EU passenger volume was to and from the UK. London - Dublin (4.4 million passengers), London-Amsterdam (3.6 million) and London-Paris (2.9 million) were the busiest intra-EU city pairs.

When only relations with a volume over 50 thousand passengers are considered, the Liverpool-Palma route recorded the highest growth rate (+171 %), Copenhagen-Malaga the most important decline (-35 %).

In international extra-EU transport, the number of passengers flying to and from South America and Australasia increased by 19 % and 18 % respectively. Passenger transport to and from the EU has grown for all the partner world regions.

Evolution of total transport 1993-2000

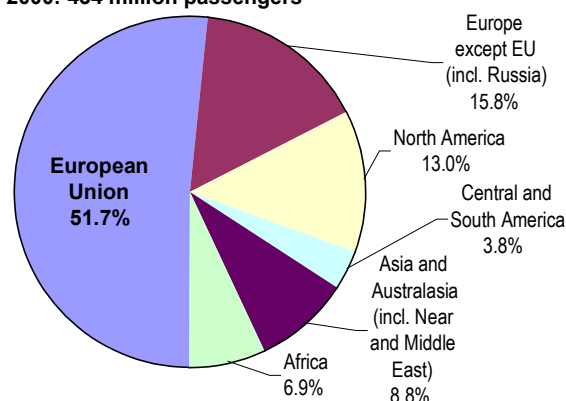
The total number of passengers carried in the EU reached nearly 434 million in 2000. This represents an increase of 8.7 % compared to 1999.

Table 1: Total international pass. transport: development by Member State

	Average annual growth 1993-1999 (%)	change 1999-2000 (%)
EU-15	+7.9	+8.7
Belgium	+12.2	+7.9
Denmark	+9.0 ¹	+6.5 ¹
Germany	+6.9	+7.3
Greece	+4.4	+9.7
Spain	+9.1	+6.4
France	+6.8	+8.7
Ireland	+17.6	+9.2
Italy	+8.7	+13.7
Luxembourg	+6.9	+5.2
Netherlands	+10.2	+8.4
Austria	+7.7	+7.1
Portugal	+7.1	+8.1
Finland	+7.5 ¹	+9.5
Sweden	+19.5	+7.2
United Kingdom	+7.5	+7.0

Graph 2 : Total international air transport in EU-15 : share by world region

2000: 434 million passengers



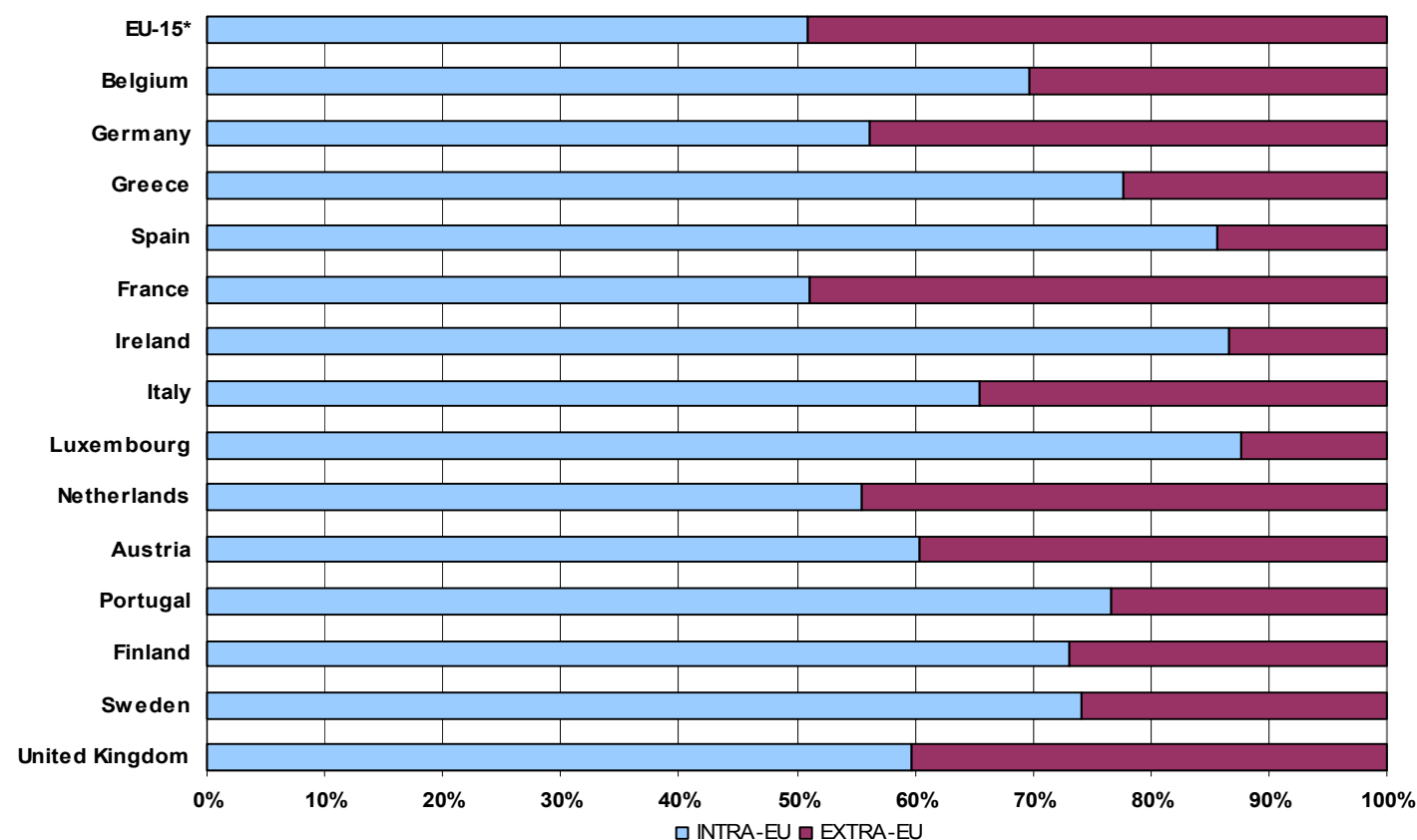
Italy, Greece, Finland, and Ireland recorded a growth of over 9 % in 2000 compared to the previous year (see Table 1). The change was positive for Member States and was equal or superior to 7 % for 12 Member States.

Graph 2 shows that international intra-EU transport accounted for close to 52% of the total, non-EU Europe and North America followed with about 16 % and 13 % respectively. The distribution in these shares did not change significantly compared to 1999.

¹ estimated

Share of intra- and extra-EU transport in total international transport

Graph 3 : Distribution between intra-EU and extra-EU passenger transport in 2000 – in % of total passengers carried



* for Total EU-15, in order to avoid double counting of intra-EU passengers (at the departure and arrival airports), only departures have been taken into account, whereas for the breakdown of each individual Member State, passengers at departures and arrivals have both been considered. Thus a person flying for instance from France to Spain, is counted as one Intra-EU passenger for France (departure Airport), for Spain (arrival airport) and also as only one Intra-EU passenger for EU-15 (as a passenger departing from France, but not as a passenger arriving in Spain).

Taking into account departures and arrivals, the share of international intra EU transport was high in most Member States: in general over 60% except for Germany, France, the Netherlands and the UK (see Graph 3 on the previous page). In 10 of the 14 Member States for which data are available, the international intra-EU share stagnated compared to 1999. Only three countries experienced a growth of the share of international intra-EU passenger transport: Finland (+1.7%), Luxembourg (+1.1%) and – at a lesser degree – the United

Kingdom (+0.3%). Conversely, the largest decrease of the share of international intra-EU passenger transport was registered in Portugal (-5.0%).

The countries recording the highest international extra-EU shares coincide with those having Europe's major airports considered as gateways for intercontinental and long-haul air traffic, like the Paris airports, Amsterdam-Schiphol, Frankfurt/Main and the London airports.

International intra-EU transport

Based on departures, international intra-EU passenger transport progressed by 6.8% from 1999 to 2000 (from 207 million to 221 million passengers).

Table 2 offers an overview of the main Member States pairs in international intra-EU transport. It appears that 11.5% of the entire passenger volume was represented by relations between the United Kingdom and Spain (and vice-versa). The

second largest Member States pair was Germany-Spain with more than 8%. The high numbers are explained by the significant holiday traffic. The third Member States pair (UK-Ireland) was less than half as important in terms of passengers as the previous one.

These first 3 pairs were responsible for a little less than a quarter (23.9%) of the entire international intra-EU passenger volume.

Table 2: Main intra-EU Member States pairs in 2000

Rank 2000	Country pair	% of total intra-EU pass. carried	Rank 1999
1	UK-Spain/Spain-UK	11.5	1
2	Germany-Spain/Spain-Germany	8.3	2
3	UK-Ireland/Ireland-UK	4.1	3
4	UK-Germany/Germany-UK	3.8	4
5	France-UK/UK-France	3.6	5
6	UK-Greece/Greece-UK	3.3	8
7	Netherlands-UK/UK-Netherlands	3.1	6
8	Italy-UK/UK-Italy	3.0	7
9	Germany-Greece/Greece-Germany	2.8	9
10	Germany-Italy/Italy-Germany	2.4	11
11	Italy-France/France-Italy	2.4	13
12	France-Germany/Germany-France	2.3	10
13	France-Spain/Spain-France	2.3	12
14	Italy-Spain/Spain Italy	1.8	14
15	Netherlands-Spain/Spain-Netherlands	1.5	16

Fourteen out of the 15 most important Member States pairs in 2000 were the same as in 1999, although they appear in a slightly different order. The "Top-5" remained strictly the same. From the eight first pairs in Table 2, seven included the United Kingdom.

When considering all international intra-EU passengers, it appears that 37.2% fly to or from the UK, 30.5% to or from Spain and 25.9% to or from Germany.

When looking at the 15 most important city pairs (Table 3 –

Table 3: Main intra-EU city pairs in 2000

Rank 2000	City pair	Number of passengers carried	Rank 1999
1	London-Dublin	4 391 528	1
2	London-Amsterdam	3 619 110	2
3	London-Paris	2 926 201	3
4	London-Frankfurt	2 184 511	4
5	London-Madrid	1 739 660	8
6	London-Milano	1 676 192	5
7	London-Malaga	1 645 738	11
8	London-Roma	1 642 588	6
9	Madrid-Paris	1 583 511	12
10	London-Bruxelles	1 394 864	7
11	London-Barcelona	1 375 164	17
12	London-Palma de Mallorca	1 372 043	14
13	London-München	1 358 286	10
14	London-Stockholm	1 328 519	13
15	Copenhagen-London	1 317 236	15

data based on departure declarations), it appears that all 15 exceed one million passengers and 14 involve London. In 1999, a total of 19 city pairs exceeded 1 million passengers. In 2000, this number reached 26.

As the last column of Table 3 suggests, the most important city pairs were largely the same as those in 1999. However, London-Madrid saw its passenger numbers increasing by 20% and progressed from position 8 to position 5.

Table 4 outlines the most 'dynamic' city pairs in international intra-EU passenger transport, both in a positive and negative sense. It appears that certain city pairs more than doubled in number of passengers carried from one year to another (like

Liverpool-Palma, +171%), while other city pairs saw their passenger figures reduced by a little more than a third (like Copenhagen-Malaga, -35%).

Table 4: Intra-EU city pairs* featuring the highest passenger growth / decline between 1999 and 2000

passenger growth			passenger decline		
rank	Relation		rank	Relation	
1	Liverpool (UK) - Palma (E)	+171%	1	Copenhagen (DK) - Malaga (E)	-35%
2	Aarhus (DK) - London (UK)	+137%	2	Helsinki (FIN) - Rhodos (EL)	-32%
3	Amsterdam (NL) - Liverpool (UK)	+113%	3	East Midlands (UK) - Paris (F)	-28%
4	Birmingham (UK) - Cork (IRL)	+79%	4	Dublin (IRL) - East Midlands (UK)	-27%
5	Cardiff (UK) - Malaga (E)	+74%	5	Dublin (IRL) - Madrid (E)	-27%
6	Madrid (E) - Stockholm (S)	+62%	6	Barcelona (E) - Hamburg (D)	-23%
7	London (UK) - Salzburg (A)	+62%	7	Brussels (B) - Ibiza (E)	-23%
8	Barcelona (E) - Nice (F)	+62%	8	Lille (F) - Palma (E)	-22%
9	Madrid (E) - Marseille (F)	+56%	9	Kerry County (IRL) - London (UK)	-22%
10	Barcelona (E) - Liverpool (UK)	+54%	10	Amsterdam (NL) - Teesside (UK)	-22%

* only relations with more than 50 000 passengers declared at arrivals and departures for both 1999 and 2000 have been considered.

The busiest airports in Europe are shown in Table 5. The ranking is based on the total number of passengers carried (arrivals and departures) within the EU, both in scheduled and non-scheduled air transport.

Compared to 1999, the ranking did not change much, except for the airport of Milano/Malpensa, which experienced an exceptionally high growth (+34.9%) and climbed from 21st to 14th position. Other airports with high growth rates were London/Stansted and Madrid/Barajas.

It is noticeable also that the obviously saturated airport of London-Heathrow progressed by only 1.1% compared to 1999, whereas the Paris airport system, Amsterdam and Frankfurt displayed relatively high growth rates and obviously have not yet reach their limits. The same phenomenon, however less strong, can be observed in international extra-EU passenger volumes (see Table 8).

The French authorities have not declared separately for the various airports of the Paris airport system (*Charles de Gaulle, Orly and Le Bourget*). If the London airports (*Heathrow, Gatwick, Luton, London-City and Stansted*) had been grouped in a « London airport system », the total number of passengers carried in 2000 would read 53 437 868, representing an increase of 7.3% compared to 1999.

Table 5: TOP-15 airports: Total international passengers carried within EU-15

Rank 2000	Airport	Total passengers carried 1999	change 1999-2000 (%)	Rank 1999
1	London/Heathrow	24 373 689	+1.1	1
2	Airport system - Paris	22 831 619	+8.2	2
3	Amsterdam/Schiphol	21 293 303	+6.5	3
4	Frankfurt (Main)	16 772 699	+6.3	4
5	Bruxelles/National	15 065 947	+5.9	6
6	London/Gatwick	14 913 451	+3.7	5
7	Palma de Mallorca	13 738 940	-0.8	7
8	Dublin	11 593 568	+7.2	9
9	Manchester/Intl	10 739 443	+4.3	10
10	Madrid/Barajas	9 802 490	+19.9	12
11	London/Stansted	9 629 910	+33.5	15
12	München	9 158 719	+6.1	11
13	Stockholm/Arlanda	8 338 570	+5.1	14
14	Milano/Malpensa	7 980 770	+34.9	21
15	Düsseldorf	7 835 741	-4.0	13

International extra-EU transport

The number of passengers arriving in or departing from the EU with an extra-EU origin or destination increased by 10.7% in 2000 compared to the previous year (from 192 million to 213 million). International extra-EU passenger volumes have thus been growing notably more than international intra-EU passenger volumes (+6.8%).

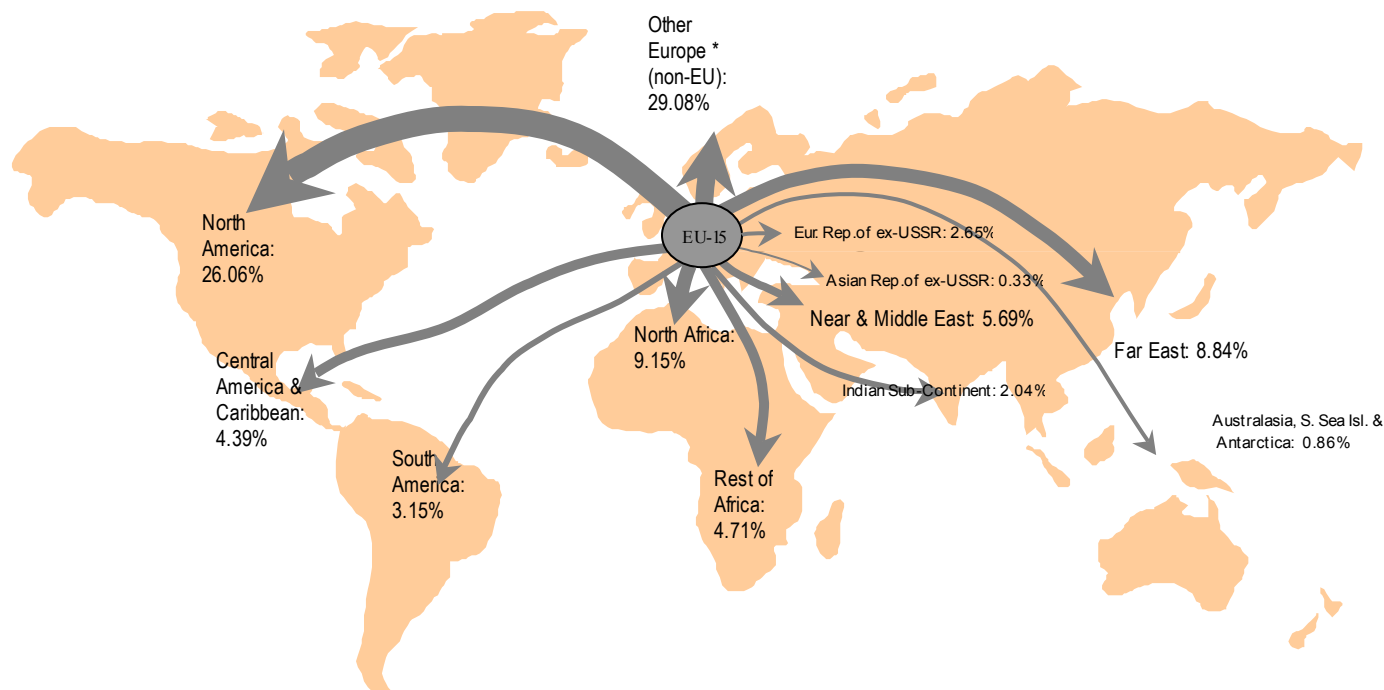
As can be seen in Graph 4, the main share in international extra-EU air transport in 2000 is taken by non-EU European countries (29.1% - European Republics of the ex-USSR not

considered) closely followed by North-America (26.1%).

The African continent accounts for 13.9% of international extra-EU passenger transport; however, North-Africa alone (with popular holiday destinations in Morocco and Tunisia) is responsible for 9.1% of this share.

Far-East destinations account for 8.8%, the Near and Middle East for 5.7% of the transport. All other destinations have a share of under 5%.

Graph 4: International extra-EU transport 2000: share in world destinations – in % of total extra-EU air transport



* excluding European Republics of the ex-USSR

Keeping in mind the shares of the various world regions in international extra-EU air transport, Table 6 outlines how these developed compared to 1999.

The most important increase was recorded for South America: passenger numbers increased by 19.0%; a substantial raise when considering the average annual growth rates of the previous years. Australasia as well as Southern-Africa recorded growth of over 15%.

No world region fell between 1999-2000, and even more, there was no change of less than +4.6%, explaining the high growth of international extra-EU passenger transport.

At a more aggregated level (four 'world regions'), Table 7 details the share of Member States in international extra-EU air transport.

The first row gives the total share of the Member States in international extra-EU transport. With 27.8%, the UK leads by a substantial margin, followed by Germany and France with 20.9% and 15.5% respectively.

Table 6: Development of int. extra-EU transport between 1993 and 2000

Air transport between EU and rest of the world (both directions)	Average annual growth (%) 1993-1999	Change 1999-2000 (%)
Total extra-EU transport	+7.6	+10.7
Central and Eastern Europe	+11.4	+14.7
European Rep. of the Ex-USSR	+7.6	+9.9
Other Europe	+5.6	+12.2
North Africa	+8.0	+12.5
West Africa	+8.3	+8.1
Central Africa	+2.5	+7.1
East Africa	+0.7	+4.6
Southern Africa	+11.5	+15.7
North America	+9.4	+7.6
Central America and Caribbean	+15.2	+10.8
South America	+8.6	+19.0
Near and Middle East	+7.3	+10.3
Asian Republics of the Ex-USSR	+16.5	+9.1
Indian Sub-Continent	+7.7	+6.5
Far East	+9.9	+11.9
Australasia, S. Sea Isl. & Antarctica	+3.9	+18.0

Table 7 : International extra-EU air transport to world regions in 2000: shares of individual Member States - in %

	B	DK	D	EL	E	F	IRL	I ¹	L ¹	NL	A ¹	P	FIN	S ¹	UK	EU-15
Total extra-EU transport	3.15	:	20.87	2.65	5.60	15.49	1.03	7.39	0.10	8.69	2.72	1.51	0.99	2.04	27.76	100
Europe-except EU	3.53	:	27.13	5.12	7.47	9.15	0.59	5.81	0.21	7.45	5.21	1.24	2.01	4.37	20.71	100
America	2.74	:	16.46	0.74	6.99	13.93	2.30	6.71	0.00	9.84	0.62	2.54	0.30	0.86	35.97	100
Asia & Australasia	1.28	:	20.70	3.25	1.36	15.24	0.02	7.92	0.00	11.32	2.97	0.03	1.04	1.19	33.68	100
Africa	5.67	:	17.87	0.90	3.54	34.44	0.31	12.04	0.21	5.55	1.88	1.60	0.27	0.71	15.03	100

Note : No data available for Denmark. ¹ Flight Stage data

Germany leads in air transport to non-EU European countries with 27.1% of the passengers carried, well in front of the United Kingdom with 20.7%. Compared to 1999, this represents a slight increase for Germany (1999: 26.5%) and a small decrease for the UK (1999: 22.1%).

Instead, the UK has still a clear dominance in passenger volumes with America (36.0%) although the share slightly decreased over the last two years (1998: 38.4%; 1999: 37.4%). The UK is followed by Germany, France and the Netherlands, for which the shares remain practically unchanged. The latter three countries together handle a slightly greater passenger volume with America (40.2%) than the United Kingdom alone.

The same ranking prevails for relations with Asia and Australasia, although a slight decline for the United Kingdom can be observed here as well (from 34.6% in 1999 to 33.7% in 2000). Germany stagnated on these routes (21.0% in 1999 against 20.7% in 2000).

As in previous years, France holds the first position in air transport with Africa. It should however be said that the high share of 34.4% is mainly due to traffic with North African destinations. If North Africa were considered separately, the French share would be even higher. Germany comes second with 17.9% (down from 18.3% in 1999) followed by the United Kingdom and Italy. Compared to 1999, the United Kingdom share remains the same (1999: 15.1%) and Italy gains in share (1999: 11.7%).

Table 8 : TOP-25 AIRPORTS with regards to the total number of passengers carried in international extra-EU air transport

Rank 2000	Airport	Total passengers carried 2000	change 1999-2000 (%)	Rank 1999
1	London/Heathrow	32 511 682	+5.8	1
2	Airport system - Paris	26 246 505	+13.4	2
3	Frankfurt (Main)	23 509 108	+10.2	3
4	Amsterdam/Schiphol	17 805 743	+9.5	4
5	London/Gatwick	14 126 816	+6.7	5
6	Milano/Malpensa	7 033 394	+22.0	7
7	Bruxelles/National	6 521 014	+13.1	8
8	Madrid/Barajas	6 288 351	+8.2	6
9	Roma/Fiumicino	5 813 931	+13.4	9
10	Munich	5 441 639	+13.8	10
11	Wien/Schwechat	4 857 120	+11.3	12
12	Manchester/Intl	4 720 259	+6.7	11
13	Düsseldorf	4 158 033	+7.3	13
14	Stockholm/Arlanda	3 506 174	+8.8	14
15	Athina	3 375 802	+29.2	15
16	Lisboa	2 336 451	+31.1	17
17	Helsinki	2 009 329	+2.5	16
18	Barcelona	1 776 447	+20.9	19
19	Stuttgart	1 751 180	+9.8	18
20	Hamburg	1 483 227	+4.4	20
21	Dublin	1 402 312	+17.8	22
22	Hannover	1 392 777	+13.6	21
23	Nice/Côte d'Azur	1 150 963	+24.2	27
24	Berlin-Tegel	1 142 997	+11.2	23
25	Lyon/Satolas	1 133 471	+22.1	26

Table 8 shows the ranking of the 25 most important airports (with regards to total passenger transport, i.e. departures and arrivals) for international extra-EU passenger transport.

The first five positions are taken by very large airports (except for the airport system of Paris, regrouping *Charles de Gaulle*, *Orly* and *Le Bourget* airports), all handling considerably more than 10 million passengers per year.

Some airports in the lower ranks display significant changes compared to 1999. This is notably the case for Milano-Malpensa, displaying a change of +22.0% (after growth of 102.0% between 1998 and 1999). This extraordinary growth for international extra-EU (and also for international intra-EU) passenger transport was registered after important infrastructural improvements (new terminals, doubling of traffic capacity) were made. Malpensa-airport was one of the 14 priority projects of the transport-TEN (trans-European Networks).

Other airports with noticeable changes are Athens and Nice/Côte d'Azur (+29% and +24% respectively) as well as Lyon/Satolas and Barcelona, which both display an increase in passenger volumes of over 20%.

Compared to 1999, all 25 major EU airports have seen their international extra-EU passenger volumes increasing. However, this phenomenon appears to be less important for some airports like Helsinki and Hamburg (+2.5% and +4.4%) but their respective position in the ranking is not affected much.

➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

The figures presented in this publication have been extracted from the Eurostat aviation database, which for the moment contains international air transport data from 1993 onwards for EEA countries and Switzerland.

The database is available online and on the annual Aviation CD-ROM.

Comparison with previous edition

Due to improvements in calculation methodologies, minor differences can be observed compared to the previous Statistics in Focus.

Definitions: On Flight Origin/Destination (OFOD) and Flight Stage (FS) Data - International Passengers

ICAO defines On Flight Origin and Destination traffic as traffic on a given flight with the same flight number subdivided by airport pairs in accordance with the point of embarkation and point of disembarkation on that flight. For passengers, freight or mail where the airport of embarkation is not known the aircraft origin should be deemed to be the point of embarkation; the same principle is used for the point of disembarkation. Since an individual passenger's air journey may consist of more than one flight, a passenger's on flight origin and destination is not necessarily his true origin and destination.

A flight stage is defined by ICAO as the operation of an aircraft from take-off to its next landing. Flight stage passengers have been classified according to the flight stage flown.

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. Thus in terms of On Flight Origin/Destination 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; Paris would record New York-Paris and London-Paris. In terms of Flight Stage data there are two flight stages and the figures recorded are; New York-London 320=(185+135) passengers; London-Paris 210=(135+75) passengers.

Passengers are defined as all passengers whose air journey begins or terminates at the reporting airport, plus connecting passengers who are counted twice at the reporting airport. Direct transit passengers are counted for Flight Stage data but not for On Flight Origin/Destination data. (In the previous example the 135 passengers in transit in London are recorded by London in terms of Flight Stage data but would not be recorded by London in terms of On Flight Origin/Destination data.)

International Passengers: On Flight Origin/Destination and Flight Stage Data - Reporting Countries

In principle, information provided in this publication is based on On Flight Origin/Destination data rather than Flight Stage data. On Flight Origin/Destination data have been used where available, but Flight Stage data have been accepted for those countries where no On Flight Origin/Destination

data were reported. That is, for all Figures and Tables, On Flight Origin/Destination data have been used for Belgium (B), Germany (D), Greece (EL), Spain (E), France (F), Ireland (IRL), Finland (FIN), the Netherlands (NL), Portugal (P) and the United Kingdom (UK); Flight Stage data only for Italy (I), Luxembourg (L), Austria (A) and Sweden (S). Denmark supplied no data in for 1999 and 2000. Belgium supplied data (OFOD) for Brussels only and Ireland provided data for Dublin, Shannon and Cork.

Important: mainly in long-haul extra-EU transport, passenger volumes declared according to the Flight Stage principle can be underestimated. Methodologically, this can't however be avoided.

Passenger data refer to international passengers, i.e. national traffic has been excluded.

World regions

The component countries comprising the five world regions (EU, Europe-except EU, America, Asia & Australasia, Africa) as defined for Table 3 relating to extra-EU air transport, can be obtained upon request. The world regions of Asia and Australasia (including South Sea Islands and Antarctica) have been grouped together in the interest of clarity.

The 'world regions' as defined in this publication corresponds to the nomenclature used by all units of Eurostat (OJ L335, 10.12.1998, page 22 – Commission Regulation (EC) 2645/98 on the nomenclature of countries and territories for the external trade statistics of the Community and statistics of trade between Member States).

Data from Sweden

Flight Stage data reported by Swedish authorities up to and including 1998 do not take into account direct transit passengers (see also last paragraph in On Flight Origin/Destination and Flight Stage Data definitions in the left column of this page). This has however only little influence on data related to Sweden and Swedish airports presented in this publication.

Estimates

For the countries having not declared On Flight Origin/Destination data or Flight Stage data for a specific year, estimates were made for departures by taking the corresponding arrival figures reported by other countries.

International Intra-EU passenger transport

The basic figures used to calculate the percentages are departure figures or estimates thereof (in order to exclude double counting). For each pair of countries, the total of the two countries' departure figures is divided by the sum of the EU departure figures (actual and estimated) to obtain the percentages shown in the table.

International Extra-EU passenger transport

In case of missing data for the calculation of the international extra-EU passenger transport of one country, estimates based on the linear regression method have been used.

The international extra-EU figures contain the 'unknown' destinations.

This publication was prepared with the assistance of Mathieu Erzar and Jelle Bosch.

Further information:

➤ Databases

New Cronos, Theme 7
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