Signs of recovery for air transport in Europe in 2009
Icelandic volcanic eruption in early 2010 shows fragility of the air transport industry

A decrease of 5.9% to 751 million passengers travelling by air was observed at EU-27 level between 2008 and 2009, reflecting the economic crisis which began in 2008. However, first signs of recovery became visible during the second quarter of 2009, when there was a decline of 6.8% in comparison with air passenger transport in the same quarter of 2008, against a fall of 12.0% for the first quarter of 2009. The last two quarters of 2009 confirmed the recovery in the air transport industry.

This positive trend has to be taken with care: although this publication describes the situation of air transport in 2009, it also shows the effect the volcanic eruption in Iceland in early 2010 had on transport by air for passengers.

It did lead to a substantial, though temporary, decrease of transport by air. While the first quarter of 2010 confirms the upward trend started in 2009, April 2010 shows a fall of 18% compared with April 2009.

In 2009, 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. Among the airports registering the largest volumes of freight and mail, Amsterdam/Schiphol and Luxembourg showed the most significant decrease in 2009 compared with 2008.

Figure 1: 2008/2009 growth in total passenger air transport by Member State (in %)

Source: Eurostat (online data code: AVIA_PAOC)
Events influencing air transport – Iceland volcano eruption

By using preliminary data available for the first half of 2010, Figure 2 shows the vulnerability of the air transport industry to unforeseen events. Following the positive trend from spring 2009 onwards, the first quarter of 2010 also shows a small positive growth rate, especially driven by the passenger volumes registered in March 2010. The growth rate of -17.8% for April 2010 indicates the enormous problems the Icelandic volcanic eruption caused for the transport of passengers by air in Europe.

Figure 2: EU-27 quarterly growth of air passenger transport, 2008/2009 and 2009/2010*

* 2009/2010 evolutions are based on the selection of countries for which 2010 data are available.

Source: Eurostat (online data code: AVIA_PAOC)

Air passenger transport recovering at EU level in the course of 2009

Figure 3: EU-27 change of air passenger transport between same quarters of 2008 and 2009

Source: Eurostat (online data code: AVIA_PAOC)

Figure 4: Overview of the EU-27 air passenger transport in 2009

Source: Eurostat (online data code: AVIA_PAOC)

Figure 3 shows the quarterly improving trend in air passenger transport in the EU-27 in 2009. Although the annual growth rate from 2008 to 2009 was -5.9%, the volume of passenger transport remained almost unchanged in the last quarter of 2009, compared with the same quarter of 2008.
Table 1: Overview of EU-27 air passenger transport by Member States in 2009: passengers carried (in 1000)

<table>
<thead>
<tr>
<th></th>
<th>Total transport</th>
<th>National transport</th>
<th>International intra-EU-27 transport</th>
<th>International extra-EU-27 transport</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Number of passengers</td>
<td>Growth 2008-2009</td>
<td>Number of passengers</td>
<td>Growth 2008-2009</td>
</tr>
<tr>
<td><strong>EU-27</strong> *</td>
<td>751 059</td>
<td>-5.9%</td>
<td>162 231</td>
<td>-5.1%</td>
</tr>
<tr>
<td><strong>BELGIUM</strong></td>
<td>BE 21 314</td>
<td>-3.0%</td>
<td>58</td>
<td>21.1%</td>
</tr>
<tr>
<td><strong>BULGARIA</strong></td>
<td>BG 5 839</td>
<td>-9.0%</td>
<td>171</td>
<td>21.4%</td>
</tr>
<tr>
<td><strong>CZECH REPUBLIC</strong></td>
<td>CZ 12 367</td>
<td>-7.9%</td>
<td>258</td>
<td>-4.8%</td>
</tr>
<tr>
<td><strong>DENMARK</strong></td>
<td>DK 20 860</td>
<td>-15.3%</td>
<td>1 878</td>
<td>-6.3%</td>
</tr>
<tr>
<td><strong>GERMANY</strong></td>
<td>DE 158 150</td>
<td>-4.8%</td>
<td>23 728</td>
<td>-5.6%</td>
</tr>
<tr>
<td><strong>ESTONIA</strong></td>
<td>EE 1 341</td>
<td>-25.7%</td>
<td>22</td>
<td>5.6%</td>
</tr>
<tr>
<td><strong>IRELAND</strong></td>
<td>IE 26 269</td>
<td>-12.5%</td>
<td>627</td>
<td>-25.8%</td>
</tr>
<tr>
<td><strong>GREECE</strong></td>
<td>EL 32 882</td>
<td>-4.4%</td>
<td>6 886</td>
<td>4.9%</td>
</tr>
<tr>
<td><strong>SPAIN</strong></td>
<td>ES 148 318</td>
<td>-8.1%</td>
<td>37 597</td>
<td>-7.8%</td>
</tr>
<tr>
<td><strong>FRANCE</strong></td>
<td>FR 117 562</td>
<td>-4.2%</td>
<td>26 005</td>
<td>-3.4%</td>
</tr>
<tr>
<td><strong>CYPRUS</strong></td>
<td>CY 6 730</td>
<td>-6.8%</td>
<td>0.1</td>
<td>-28.9%</td>
</tr>
<tr>
<td><strong>LATVIA</strong></td>
<td>LV 1 341</td>
<td>10.2%</td>
<td>1 038</td>
<td>-28.1%</td>
</tr>
<tr>
<td><strong>LITHUANIA</strong></td>
<td>LT 1 535</td>
<td>-26.8%</td>
<td>0.1</td>
<td>-37.0%</td>
</tr>
<tr>
<td><strong>LUXEMBOURG</strong></td>
<td>LU 1 535</td>
<td>-10.4%</td>
<td>22</td>
<td>5.6%</td>
</tr>
<tr>
<td><strong>HUNGARY</strong></td>
<td>HU 8 081</td>
<td>-4.1%</td>
<td>-</td>
<td>-93.3%</td>
</tr>
<tr>
<td><strong>MALTA</strong></td>
<td>MT 2 191</td>
<td>-6.1%</td>
<td>-</td>
<td>-100.0%</td>
</tr>
<tr>
<td><strong>NETHERLANDS</strong></td>
<td>NL 46 479</td>
<td>-7.8%</td>
<td>4 904</td>
<td>-93.3%</td>
</tr>
<tr>
<td><strong>AUSTRIA</strong></td>
<td>AT 21 817</td>
<td>-8.7%</td>
<td>691</td>
<td>-1.6%</td>
</tr>
<tr>
<td><strong>POLAND</strong></td>
<td>PL 17 046</td>
<td>-9.0%</td>
<td>-</td>
<td>-45.1%</td>
</tr>
<tr>
<td><strong>PORTUGAL</strong></td>
<td>PT 24 104</td>
<td>-4.3%</td>
<td>3 004</td>
<td>4.4%</td>
</tr>
<tr>
<td><strong>ROMANIA</strong></td>
<td>RO 7 984</td>
<td>-0.6%</td>
<td>625</td>
<td>-6.8%</td>
</tr>
<tr>
<td><strong>SLOVAKIA</strong></td>
<td>SK 1 535</td>
<td>-13.7%</td>
<td>0.1</td>
<td>-37.0%</td>
</tr>
<tr>
<td><strong>SLOVENIA</strong></td>
<td>SI 1 341</td>
<td>-25.0%</td>
<td>0.1</td>
<td>-37.0%</td>
</tr>
<tr>
<td><strong>SWEDEN</strong></td>
<td>SE 25 219</td>
<td>-9.3%</td>
<td>5 966</td>
<td>-11.5%</td>
</tr>
<tr>
<td><strong>UNITED KINGDOM</strong></td>
<td>UK 198 532</td>
<td>-7.2%</td>
<td>22 913</td>
<td>-7.9%</td>
</tr>
</tbody>
</table>

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

Source: Eurostat (online data code: AVIA_PAOC)

Table 2: Intra-EU traffic at country level: 43% of the 2009 total traffic at a glance (and corresponding 2008 figures)

<table>
<thead>
<tr>
<th>Rank</th>
<th>Country pairs</th>
<th>2008 Passengers carried (in 1000)</th>
<th>Share in total intra-EU</th>
<th>2009 Passengers carried (in 1000)</th>
<th>Share in total intra-EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Spain United Kingdom</td>
<td>34 731</td>
<td>10.1%</td>
<td>30 551</td>
<td>10.1%</td>
</tr>
<tr>
<td>2</td>
<td>Germany Spain</td>
<td>22 292</td>
<td>6.5%</td>
<td>20 391</td>
<td>6.7%</td>
</tr>
<tr>
<td>3</td>
<td>France United Kingdom</td>
<td>11 960</td>
<td>3.5%</td>
<td>10 965</td>
<td>3.6%</td>
</tr>
<tr>
<td>4</td>
<td>Ireland United Kingdom</td>
<td>12 343</td>
<td>3.6%</td>
<td>10 914</td>
<td>3.5%</td>
</tr>
<tr>
<td>5</td>
<td>Germany United Kingdom</td>
<td>11 148</td>
<td>3.2%</td>
<td>10 709</td>
<td>3.5%</td>
</tr>
<tr>
<td>6</td>
<td>Germany Italy</td>
<td>10 578</td>
<td>3.1%</td>
<td>10 414</td>
<td>3.4%</td>
</tr>
<tr>
<td>7</td>
<td>Italy United Kingdom</td>
<td>10 576</td>
<td>3.1%</td>
<td>9 936</td>
<td>3.2%</td>
</tr>
<tr>
<td>8</td>
<td>Spain Italy</td>
<td>10 079</td>
<td>2.9%</td>
<td>9 695</td>
<td>3.2%</td>
</tr>
<tr>
<td>9</td>
<td>Italy France</td>
<td>8 190</td>
<td>2.4%</td>
<td>7 893</td>
<td>2.6%</td>
</tr>
<tr>
<td>10</td>
<td>France Spain</td>
<td>8 444</td>
<td>2.4%</td>
<td>7 608</td>
<td>2.5%</td>
</tr>
</tbody>
</table>

Source: Eurostat (online data code: AVIA_PAOC)

Figure 4 indicates that the share of international intra-EU transport decreased to 42% in 2009. Although remaining the largest among the three components of air transport, intra-EU transport has also been the most affected by the decline (-8.0% between 2008 and 2009). There are however clear disparities at country level, with Latvia registering an impressive rise of +12.4% in international intra-EU transport over the same period as shown in Table 1.

Table 2 shows the top 10 country-to-country flows within international intra-EU transport. In 2009, more than 10% of the intra-EU transport took place between Spain and the United Kingdom. The influence of the economic crisis on the share in total international intra-EU transport of these top country-to-country flows was relatively limited.
Map 1 presents an overall picture of the extra EU-market. Particularly remarkable is the +4.8% growth between 2008 and 2009 for transport between the EU and the Near and Middle East region, being the only region recording an increase over this period for the transport of passengers.

The overall decline observed in total passenger transport was most pronounced for transport to/from Central America (-10.5% between 2008 and 2009) and the Indian Sub-Continent (-9.3%).
London Heathrow predominates among EU-27 airports

Map 2: London Heathrow, the main European hub for extra-EU transport in 2009 (passengers carried in 1000, arrivals plus departures)

Source: Eurostat (online data code: AVIA_PAR_UK)
London Heathrow remained the main European hub for extra-EU transport, accounting alone for 14% of passengers travelling to/from extra-EU destinations. The largest extra-EU route in 2009 was London Heathrow-New York JFK, despite a fall of 11.6% compared with 2008.

The top 30 airports in the EU-27 in terms of passenger transport in 2009 are presented in Table 3, including the most significant airport of Member States not appearing in the top 30. Compared with 2008, changes are marginal (no change took place in the top-10 airports).

For the large majority of the biggest airports, the number of flights decreased more significantly between 2008 and 2009 than the volume of passenger transport: this could reflect an increase in the average occupancy rates at these airports, or at least an adaptation of the transport market to the crisis.

Table 3: Top airports in the EU-27 in terms of total passengers carried in 2009

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>UK</td>
<td>LONDON/HEATHROW</td>
<td>65,904</td>
<td>21,648</td>
<td>39,001</td>
<td>-1.5%</td>
<td>458</td>
<td>-2.7%</td>
</tr>
<tr>
<td>2</td>
<td>FR</td>
<td>PARIS/CHARLES DE GAULLE</td>
<td>57,689</td>
<td>23,837</td>
<td>27,717</td>
<td>-4.6%</td>
<td>497</td>
<td>-5.9%</td>
</tr>
<tr>
<td>3</td>
<td>DE</td>
<td>FRANKFURT/MAIN</td>
<td>50,573</td>
<td>18,799</td>
<td>25,010</td>
<td>-4.9%</td>
<td>434</td>
<td>-4.1%</td>
</tr>
<tr>
<td>4</td>
<td>ES</td>
<td>MADRID/Barajas</td>
<td>47,944</td>
<td>17,664</td>
<td>21,580</td>
<td>-4.6%</td>
<td>416</td>
<td>-6.8%</td>
</tr>
<tr>
<td>5</td>
<td>NL</td>
<td>AMSTERDAM/SCHIPHOL</td>
<td>43,532</td>
<td>24,181</td>
<td>19,351</td>
<td>-8.2%</td>
<td>363</td>
<td>-8.5%</td>
</tr>
<tr>
<td>6</td>
<td>IT</td>
<td>ROMA/Fiumicino</td>
<td>33,418</td>
<td>12,554</td>
<td>20,864</td>
<td>-4.0%</td>
<td>317</td>
<td>-5.4%</td>
</tr>
<tr>
<td>7</td>
<td>DE</td>
<td>MÜNCHEN</td>
<td>32,560</td>
<td>9,195</td>
<td>23,365</td>
<td>-5.3%</td>
<td>373</td>
<td>-7.6%</td>
</tr>
<tr>
<td>8</td>
<td>UK</td>
<td>LONDON/GATWICK</td>
<td>32,360</td>
<td>18,759</td>
<td>9,399</td>
<td>-5.3%</td>
<td>373</td>
<td>-7.6%</td>
</tr>
<tr>
<td>9</td>
<td>ES</td>
<td>BARCELONA</td>
<td>27,287</td>
<td>12,990</td>
<td>5,297</td>
<td>-10.1%</td>
<td>263</td>
<td>-13.7%</td>
</tr>
<tr>
<td>10</td>
<td>FR</td>
<td>PARIS/ORLY</td>
<td>25,087</td>
<td>7,530</td>
<td>8,611</td>
<td>-4.2%</td>
<td>223</td>
<td>-4.4%</td>
</tr>
<tr>
<td>11</td>
<td>ES</td>
<td>PALMA DE MALLORCA</td>
<td>21,733</td>
<td>13,989</td>
<td>7,860</td>
<td>-7.2%</td>
<td>214</td>
<td>-7.9%</td>
</tr>
<tr>
<td>12</td>
<td>IE</td>
<td>DUBLIN</td>
<td>20,469</td>
<td>17,389</td>
<td>3,080</td>
<td>12.4%</td>
<td>155</td>
<td>16.0%</td>
</tr>
<tr>
<td>13</td>
<td>UK</td>
<td>LONDON/STANSTED</td>
<td>19,949</td>
<td>16,740</td>
<td>3,095</td>
<td>-10.7%</td>
<td>175</td>
<td>-13.2%</td>
</tr>
<tr>
<td>14</td>
<td>AT</td>
<td>WIEN/SCHWECHAT</td>
<td>19,605</td>
<td>16,067</td>
<td>3,538</td>
<td>-9.6%</td>
<td>146</td>
<td>-12.6%</td>
</tr>
<tr>
<td>15</td>
<td>DE</td>
<td>MÜNCHEN</td>
<td>18,630</td>
<td>16,016</td>
<td>2,614</td>
<td>-11.1%</td>
<td>160</td>
<td>-14.9%</td>
</tr>
<tr>
<td>16</td>
<td>UK</td>
<td>MANCHESTER</td>
<td>18,300</td>
<td>14,333</td>
<td>3,967</td>
<td>-2.2%</td>
<td>175</td>
<td>-4.4%</td>
</tr>
<tr>
<td>17</td>
<td>DE</td>
<td>DÜSSELDORF</td>
<td>17,724</td>
<td>11,346</td>
<td>6,378</td>
<td>-7.5%</td>
<td>206</td>
<td>-6.1%</td>
</tr>
<tr>
<td>18</td>
<td>IT</td>
<td>MILANO/MALPENSA</td>
<td>17,348</td>
<td>8,776</td>
<td>8,572</td>
<td>-8.8%</td>
<td>175</td>
<td>-13.2%</td>
</tr>
<tr>
<td>19</td>
<td>BE</td>
<td>BRUXELLES/NATIONAL</td>
<td>16,785</td>
<td>12,309</td>
<td>4,476</td>
<td>-9.6%</td>
<td>201</td>
<td>-8.4%</td>
</tr>
<tr>
<td>20</td>
<td>EL</td>
<td>ATHINAI</td>
<td>16,138</td>
<td>7,540</td>
<td>2,438</td>
<td>-9.6%</td>
<td>201</td>
<td>-8.4%</td>
</tr>
<tr>
<td>21</td>
<td>SE</td>
<td>STOCKHOLM/ARLANDA</td>
<td>16,058</td>
<td>8,394</td>
<td>7,664</td>
<td>-11.4%</td>
<td>159</td>
<td>-12.2%</td>
</tr>
<tr>
<td>22</td>
<td>DE</td>
<td>BERLIN/TEGEL</td>
<td>14,333</td>
<td>6,352</td>
<td>2,981</td>
<td>-3.5%</td>
<td>146</td>
<td>-4.4%</td>
</tr>
<tr>
<td>23</td>
<td>PT</td>
<td>LISBOA</td>
<td>13,265</td>
<td>7,648</td>
<td>5,617</td>
<td>-6.0%</td>
<td>129</td>
<td>-5.4%</td>
</tr>
<tr>
<td>24</td>
<td>FI</td>
<td>HELSINKI/VANTAA</td>
<td>12,602</td>
<td>7,420</td>
<td>5,182</td>
<td>-6.2%</td>
<td>153</td>
<td>-8.4%</td>
</tr>
<tr>
<td>25</td>
<td>DE</td>
<td>HAMBURG</td>
<td>12,178</td>
<td>4,651</td>
<td>7,527</td>
<td>-4.7%</td>
<td>136</td>
<td>-8.4%</td>
</tr>
<tr>
<td>26</td>
<td>CZ</td>
<td>PRAHA/RUZYN</td>
<td>11,602</td>
<td>3,182</td>
<td>5,380</td>
<td>-7.6%</td>
<td>153</td>
<td>-7.8%</td>
</tr>
<tr>
<td>27</td>
<td>ES</td>
<td>MALAGA</td>
<td>11,601</td>
<td>8,285</td>
<td>3,316</td>
<td>-7.8%</td>
<td>153</td>
<td>-7.8%</td>
</tr>
<tr>
<td>28</td>
<td>FR</td>
<td>NICE/CÔTE D'AZUR</td>
<td>9,813</td>
<td>4,279</td>
<td>1,473</td>
<td>-5.3%</td>
<td>150</td>
<td>-9.5%</td>
</tr>
<tr>
<td>29</td>
<td>DE</td>
<td>KÖLN/BOONN</td>
<td>9,696</td>
<td>4,335</td>
<td>1,361</td>
<td>-5.8%</td>
<td>155</td>
<td>-9.5%</td>
</tr>
<tr>
<td>30</td>
<td>UK</td>
<td>LONDON/LUTON</td>
<td>9,115</td>
<td>6,987</td>
<td>2,128</td>
<td>-10.4%</td>
<td>173</td>
<td>-11.5%</td>
</tr>
<tr>
<td>31</td>
<td>PL</td>
<td>WARSAW/OKIECIE</td>
<td>8,333</td>
<td>5,333</td>
<td>2,166</td>
<td>-12.1%</td>
<td>123</td>
<td>-11.3%</td>
</tr>
<tr>
<td>32</td>
<td>HU</td>
<td>BUDAPEST/FERIHEGY</td>
<td>8,081</td>
<td>3,541</td>
<td>5,540</td>
<td>-8.1%</td>
<td>134</td>
<td>-7.2%</td>
</tr>
<tr>
<td>33</td>
<td>CY</td>
<td>LARNAKA</td>
<td>5,156</td>
<td>2,628</td>
<td>2,528</td>
<td>-9.0%</td>
<td>94</td>
<td>-12.2%</td>
</tr>
<tr>
<td>34</td>
<td>RO</td>
<td>BUCUREȘTI/OTOPENI</td>
<td>4,841</td>
<td>2,929</td>
<td>1,912</td>
<td>-5.3%</td>
<td>146</td>
<td>-4.4%</td>
</tr>
<tr>
<td>35</td>
<td>LV</td>
<td>RIGA</td>
<td>4,063</td>
<td>3,112</td>
<td>950</td>
<td>10.2%</td>
<td>57</td>
<td>6.3%</td>
</tr>
<tr>
<td>36</td>
<td>BG</td>
<td>SOFIA</td>
<td>3,116</td>
<td>2,547</td>
<td>569</td>
<td>-2.8%</td>
<td>37</td>
<td>-5.0%</td>
</tr>
<tr>
<td>37</td>
<td>MT</td>
<td>MALTA/LUQA</td>
<td>2,919</td>
<td>2,672</td>
<td>247</td>
<td>-6.1%</td>
<td>27</td>
<td>-1.6%</td>
</tr>
<tr>
<td>38</td>
<td>SK</td>
<td>BRATISLAVA/IVANKA</td>
<td>1,701</td>
<td>1,034</td>
<td>667</td>
<td>-22.9%</td>
<td>20</td>
<td>-19.6%</td>
</tr>
<tr>
<td>39</td>
<td>LU</td>
<td>LUXEMBOURG</td>
<td>1,535</td>
<td>1,204</td>
<td>331</td>
<td>-10.4%</td>
<td>36</td>
<td>-9.4%</td>
</tr>
<tr>
<td>40</td>
<td>SI</td>
<td>LJUBLJANA/PUČNIK</td>
<td>1,423</td>
<td>816</td>
<td>607</td>
<td>-13.7%</td>
<td>33</td>
<td>-9.2%</td>
</tr>
<tr>
<td>41</td>
<td>EE</td>
<td>TALLINN/ULEMA</td>
<td>1,341</td>
<td>1,038</td>
<td>303</td>
<td>-25.7%</td>
<td>24</td>
<td>-24.9%</td>
</tr>
<tr>
<td>42</td>
<td>LT</td>
<td>VILNIUS</td>
<td>1,306</td>
<td>994</td>
<td>312</td>
<td>-36.1%</td>
<td>20</td>
<td>-43.8%</td>
</tr>
</tbody>
</table>

Source: Eurostat (online data code: AVIA_PAQA)
The impact of the economic crisis is clearly visible in Table 3 as almost all the airports present a negative annual evolution in 2009, some of them reporting considerable changes (-36.1% at Vilnius airport).

Riga International is the only airport presented still reporting a growth in passenger transport, 10.2% higher in 2009 compared with 2008.

Map 3: Top 10 airport pairs within the EU-27 in 2009

Map 3 shows the top 10 airport pairs within the EU-27. Only one of these routes concerns international transport. The largest intra-EU route, between Barcelona and Madrid, has experienced a significant decrease of 15.9% in 2009 compared with 2008. An indication that the competition of the high-speed railway link between these two cities has strengthened the general effect of the economic crisis is given by the comparison with the largest national route in France between Paris/Orly and Toulouse Blagnac which fell by only -0.9% over the same period.
Air freight and mail transport also shows signs of recovery

Figure 5: Change in freight and mail transport between same quarters of 2008 and 2009

Figure 5 indicates that transport of freight and mail shows the same signs of recovery as observed for passenger transport.

At EU-27 level, the evolution for 2008-2009 is -12.3%. It is important to notice that in the course of the last two quarters of 2009, the transport of freight and mail recovered steadily, resulting in an increase for the last quarter of 2009 (+3.3% compared with the same quarter in 2008).

Source: Eurostat (online data code: AVIA_GOOC)

Table 4: Overview of the EU-27 air freight and mail transport by Member States in 2009: freight and mail carried (in tonnes)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>BELGIUM</td>
<td>836 409</td>
<td>-21.9%</td>
<td>784</td>
<td>31.8%</td>
<td>255 250</td>
<td>-19.5%</td>
<td>580 375</td>
<td>-23.0%</td>
</tr>
<tr>
<td>BULGARIA</td>
<td>17 450</td>
<td>-10.7%</td>
<td>26</td>
<td>-17.1%</td>
<td>12 194</td>
<td>-20.8%</td>
<td>5 230</td>
<td>27.3%</td>
</tr>
<tr>
<td>CZECH REPUBLIC</td>
<td>53 924</td>
<td>-3.5%</td>
<td>1 486</td>
<td>-21.5%</td>
<td>25 792</td>
<td>-16.7%</td>
<td>26 646</td>
<td>13.8%</td>
</tr>
<tr>
<td>DENMARK</td>
<td>155 438</td>
<td>-38.8%</td>
<td>2 136</td>
<td>-17.9%</td>
<td>65 886</td>
<td>-41.6%</td>
<td>87 416</td>
<td>-37.0%</td>
</tr>
<tr>
<td>GERMANY</td>
<td>3 341 222</td>
<td>-6.4%</td>
<td>108 679</td>
<td>-15.4%</td>
<td>786 918</td>
<td>-6.0%</td>
<td>2 432 655</td>
<td>-7.7%</td>
</tr>
<tr>
<td>ESTONIA</td>
<td>20 526</td>
<td>-50.8%</td>
<td>-</td>
<td>-</td>
<td>4 587</td>
<td>-35.4%</td>
<td>15 939</td>
<td>-54.0%</td>
</tr>
<tr>
<td>IRELAND</td>
<td>112 049</td>
<td>-11.7%</td>
<td>6 105</td>
<td>-21.2%</td>
<td>71 542</td>
<td>-11.5%</td>
<td>34 402</td>
<td>-23.9%</td>
</tr>
<tr>
<td>GREECE</td>
<td>95 222</td>
<td>-12.3%</td>
<td>12 113</td>
<td>-14.5%</td>
<td>52 572</td>
<td>-11.5%</td>
<td>30 537</td>
<td>-12.9%</td>
</tr>
<tr>
<td>SPAIN</td>
<td>502 585</td>
<td>-6.9%</td>
<td>84 543</td>
<td>-16.7%</td>
<td>151 378</td>
<td>-8.6%</td>
<td>266 664</td>
<td>-2.6%</td>
</tr>
<tr>
<td>FRANCE (2)</td>
<td>1 445 599</td>
<td>-13.3%</td>
<td>148 037</td>
<td>1.7%</td>
<td>260 152</td>
<td>-12.0%</td>
<td>1 037 410</td>
<td>-15.5%</td>
</tr>
<tr>
<td>ITALY</td>
<td>705 883</td>
<td>-13.4%</td>
<td>60 825</td>
<td>-10.9%</td>
<td>253 166</td>
<td>-6.1%</td>
<td>391 952</td>
<td>-17.9%</td>
</tr>
<tr>
<td>CYPRUS</td>
<td>36 636</td>
<td>-9.7%</td>
<td>1</td>
<td>-</td>
<td>30 465</td>
<td>-10.6%</td>
<td>8 169</td>
<td>-6.3%</td>
</tr>
<tr>
<td>LATVIA</td>
<td>8 646</td>
<td>25.6%</td>
<td>-</td>
<td>-</td>
<td>5 917</td>
<td>24.2%</td>
<td>2 729</td>
<td>28.8%</td>
</tr>
<tr>
<td>LITHUANIA</td>
<td>6 465</td>
<td>-28.6%</td>
<td>-</td>
<td>-</td>
<td>5 467</td>
<td>-15.9%</td>
<td>998</td>
<td>-60.8%</td>
</tr>
<tr>
<td>LUXEMBOURG</td>
<td>627 261</td>
<td>-20.4%</td>
<td>-</td>
<td>-</td>
<td>43 608</td>
<td>-4.6%</td>
<td>583 653</td>
<td>-21.4%</td>
</tr>
<tr>
<td>HUNGARY</td>
<td>54 138</td>
<td>-13.4%</td>
<td>-</td>
<td>-</td>
<td>24 596</td>
<td>-5.4%</td>
<td>29 542</td>
<td>-19.2%</td>
</tr>
<tr>
<td>MALTA</td>
<td>17 496</td>
<td>-4.0%</td>
<td>-</td>
<td>-</td>
<td>11 531</td>
<td>-9.9%</td>
<td>5 965</td>
<td>9.9%</td>
</tr>
<tr>
<td>NETHERLANDS (3)</td>
<td>1 371 235</td>
<td>-16.8%</td>
<td>0.4</td>
<td>2130.0%</td>
<td>48 418</td>
<td>-20.2%</td>
<td>1 322 817</td>
<td>-16.7%</td>
</tr>
<tr>
<td>AUSTRIA</td>
<td>202 642</td>
<td>-1.7%</td>
<td>807</td>
<td>-9.0%</td>
<td>49 061</td>
<td>-6.7%</td>
<td>152 774</td>
<td>0.0%</td>
</tr>
<tr>
<td>POLAND</td>
<td>53 510</td>
<td>-8.0%</td>
<td>7 874</td>
<td>0.5%</td>
<td>28 779</td>
<td>-4.0%</td>
<td>18 856</td>
<td>-17.1%</td>
</tr>
<tr>
<td>PORTUGAL</td>
<td>125 498</td>
<td>-8.0%</td>
<td>21 624</td>
<td>-2.2%</td>
<td>54 406</td>
<td>-10.7%</td>
<td>49 468</td>
<td>-7.2%</td>
</tr>
<tr>
<td>ROMANIA</td>
<td>23 482</td>
<td>-3.9%</td>
<td>281</td>
<td>-16.1%</td>
<td>19 197</td>
<td>3.5%</td>
<td>4 034</td>
<td>-27.8%</td>
</tr>
<tr>
<td>SLOVENIA</td>
<td>5 584</td>
<td>-31.7%</td>
<td>-</td>
<td>-</td>
<td>3 625</td>
<td>-35.0%</td>
<td>1 759</td>
<td>-23.4%</td>
</tr>
<tr>
<td>SLOVAKIA</td>
<td>12 231</td>
<td>64.6%</td>
<td>2</td>
<td>100.0%</td>
<td>11 689</td>
<td>72.9%</td>
<td>540</td>
<td>-19.5%</td>
</tr>
<tr>
<td>FINLAND</td>
<td>126 900</td>
<td>-14.2%</td>
<td>3 691</td>
<td>2.5%</td>
<td>50 990</td>
<td>-12.7%</td>
<td>72 219</td>
<td>-15.8%</td>
</tr>
<tr>
<td>SWEDEN</td>
<td>161 310</td>
<td>-21.8%</td>
<td>17 972</td>
<td>-17.8%</td>
<td>76 421</td>
<td>-22.7%</td>
<td>66 917</td>
<td>-21.8%</td>
</tr>
<tr>
<td>UNITED KINGDOM</td>
<td>2 156 153</td>
<td>-10.6%</td>
<td>117 695</td>
<td>-6.1%</td>
<td>379 798</td>
<td>-7.6%</td>
<td>1 658 660</td>
<td>-11.5%</td>
</tr>
</tbody>
</table>

(1) Double counting is excluded in the intra-EU-27 and total EU-27 aggregates by taking into consideration only departure declarations.
(2) 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.
(3) The high growth observed at national level should be considered with care, as it represents a very small volume of freight and mail in absolute terms.

Source: Eurostat (online data code: AVIA_GOOC)
Extra-EU destinations remained the most important segment of the freight and mail market, representing 79% of the total transport at EU level. The breakdown of extra-EU transport by world region shows that the Near and Middle East region, the only partner region registering an annual increase of almost 5% for passenger transport (see Map 1), recorded a decrease of 7% for freight and mail transport over the same period. Decreases in freight and mail transport have also been registered for all the other partner regions.

**Figure 6: Overview of the EU-27 air freight and mail transport in 2009**

![Diagram of EU-27 air freight and mail transport in 2009]

<table>
<thead>
<tr>
<th>Country</th>
<th>Total air transport (in tonnes)</th>
<th>Freight and mail loaded</th>
<th>Freight and mail unloaded</th>
<th>Growth of total freight transport 2008-2009</th>
<th>Total number of freight flights 2008-2009</th>
<th>Growth of total number of freight flights 2008-2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>DE</td>
<td>1 882 662</td>
<td>933 781</td>
<td>948 881</td>
<td>-10.5%</td>
<td>21</td>
<td>-4.7%</td>
</tr>
<tr>
<td>UK</td>
<td>1 348 914</td>
<td>717 066</td>
<td>631 848</td>
<td>-9.0%</td>
<td>3</td>
<td>-2.8%</td>
</tr>
<tr>
<td>NL</td>
<td>1 316 848</td>
<td>703 160</td>
<td>613 688</td>
<td>-17.3%</td>
<td>13</td>
<td>-9.1%</td>
</tr>
<tr>
<td>FR</td>
<td>1 202 300</td>
<td>584 795</td>
<td>617 505</td>
<td>-13.6%</td>
<td>44</td>
<td>-6.0%</td>
</tr>
<tr>
<td>LU</td>
<td>627 261</td>
<td>288 286</td>
<td>338 975</td>
<td>-20.4%</td>
<td>10</td>
<td>-11.2%</td>
</tr>
<tr>
<td>DE</td>
<td>549 025</td>
<td>258 675</td>
<td>290 350</td>
<td>-4.4%</td>
<td>22</td>
<td>-8.6%</td>
</tr>
<tr>
<td>DE</td>
<td>508 793</td>
<td>255 963</td>
<td>252 830</td>
<td>18.3%</td>
<td>28</td>
<td>2.0%</td>
</tr>
<tr>
<td>BE</td>
<td>401 799</td>
<td>203 903</td>
<td>197 896</td>
<td>5.3%</td>
<td>23</td>
<td>-4.5%</td>
</tr>
<tr>
<td>BE</td>
<td>364 426</td>
<td>172 391</td>
<td>192 035</td>
<td>-40.7%</td>
<td>11</td>
<td>-10.1%</td>
</tr>
<tr>
<td>IT</td>
<td>343 561</td>
<td>166 901</td>
<td>178 660</td>
<td>-17.0%</td>
<td>6</td>
<td>-13.3%</td>
</tr>
<tr>
<td>ES</td>
<td>530 161</td>
<td>168 515</td>
<td>163 446</td>
<td>-7.0%</td>
<td>9</td>
<td>-7.1%</td>
</tr>
<tr>
<td>UK</td>
<td>286 629</td>
<td>140 989</td>
<td>145 639</td>
<td>-2.0%</td>
<td>18</td>
<td>-13.2%</td>
</tr>
<tr>
<td>DE</td>
<td>234 340</td>
<td>109 395</td>
<td>124 945</td>
<td>-11.5%</td>
<td>4</td>
<td>-7.6%</td>
</tr>
<tr>
<td>UK</td>
<td>213 384</td>
<td>123 411</td>
<td>89 972</td>
<td>-7.2%</td>
<td>10</td>
<td>-12.0%</td>
</tr>
<tr>
<td>AT</td>
<td>198 327</td>
<td>126 731</td>
<td>71 596</td>
<td>-1.5%</td>
<td>4</td>
<td>-8.7%</td>
</tr>
<tr>
<td>DK</td>
<td>152 012</td>
<td>77 227</td>
<td>74 785</td>
<td>-38.4%</td>
<td>6</td>
<td>-11.7%</td>
</tr>
<tr>
<td>IT</td>
<td>139 014</td>
<td>65 679</td>
<td>73 335</td>
<td>-9.1%</td>
<td>4</td>
<td>-5.7%</td>
</tr>
<tr>
<td>FI</td>
<td>121 849</td>
<td>61 071</td>
<td>60 776</td>
<td>-13.9%</td>
<td>5</td>
<td>-6.4%</td>
</tr>
<tr>
<td>DE</td>
<td>105 059</td>
<td>54 865</td>
<td>50 195</td>
<td>-14.0%</td>
<td>4</td>
<td>-3.3%</td>
</tr>
<tr>
<td>UK</td>
<td>103 006</td>
<td>60 415</td>
<td>42 591</td>
<td>-27.8%</td>
<td>2</td>
<td>-15.2%</td>
</tr>
</tbody>
</table>

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

Source: Eurostat (online data code: AVIA_GOOA)

Although the top-5 airports in the EU-27 in terms of total freight and mail carried remained unchanged between 2008 and 2009, they all registered a decrease in total freight transport. The only large airports recording an expansion in 2009 are Leipzig/Halle, reflecting the influence of the DHL move in 2008, and Liege/Bierset, Belgium’s biggest cargo airport.
Air transport in the Candidates and EFTA countries

Map 4 presents the air passenger flows between the EU-27 and Candidate/EFTA countries.

Map 4: Air passenger transport between Candidate/EFTA countries and the EU-27 in 2009 (in 1000 passengers)

![Map 4: Air passenger transport between Candidate/EFTA countries and the EU-27 in 2009 (in 1000 passengers)](image)

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

Source: Eurostat (online data code: AVIA_PAOC)

---

**METHODOLOGICAL NOTES**

**Data sources**

All figures presented in this publication have been extracted from the Eurostat aviation database. The database is available online from the Eurostat web page.

**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 (OFOD) data. Only when OFOD data have not been reported, airport declarations have been used.

Airport coverage
In principle, this publication covers air transport in the airports of the reporting countries registering more than 150 000 passengers annually.

Notes on some Reporting Countries
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 and mail data for France.

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 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.

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 3
The total figures for each pair of airports have been calculated by adding the "Departures" declarations of the two airports concerned.

Map 4
The share of total transport represents, for each Candidate and EFTA country, the part of transport to/from EU countries within total transport. As indicated under the maps, transport to/from EU countries is sometimes estimated on the basis of mirror EU declarations.

In this publication
":" means "not available"
"-" means "not applicable"
"0" means "less than half the unit used"

This publication was prepared with the assistance of Mathieu Erzar and Julien Tardivon (data).
Further information

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

Data on "Transport statistics"
Select "air transport"

Further information about "Transport statistics"

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

European Statistical Data Support:

With the members of the ‘European statistical system’, Eurostat has set up a network of support centres in nearly every Member State and in some EFTA countries.

Their role is to provide help and guidance to Internet users of European statistics.

Contact details for this support network can be found on the Eurostat website at:
http://ec.europa.eu/eurostat/.

All Eurostat publications can be ordered via the ‘EU Bookshop’: