



# Market Segments in European Air Traffic 2013

## Summary

In this report on the traffic breakdown per **market segment** – traditional-scheduled, low-cost, business aviation, non-scheduled, all-cargo - we present an overview of the traffic growth over the past **six years** by tracking the main changes through time per segment and by providing a more **detailed analysis of 2013** traffic.

- 2008 - 2013 was a period with a 6% decline in total traffic with most of the market segments reacting negatively to the economic crisis, exception being the low-cost which showed consistent growth over this period (18% total growth),
- In 2013, the traditional-scheduled segment represents the main share of flights in Europe - 55% - followed by low-cost, business aviation, non-scheduled and all-cargo,
- The non-scheduled segment was the most affected by the political instability in the Middle East and North Africa with decrease and diversion of the traffic flows from the region,
- Low-cost was still presenting growth in 2013 even in the states where it has already a great share of the traffic like Spain and UK,
- Turkey is the main driver of passenger traffic growth in Europe,
- Traditional-scheduled aircraft operators are more and more opting for the standardization of the fleets and low-cost airlines are giving preference for larger aircraft,
- The busiest airports in Europe remain traditional-scheduled dominated while the other segments are segregated into secondary airports within the same region,
- Measures adopted to overcome the effects of the economic crisis in certain regions are having an influence on the distribution of the market segments per airport,
- The main routes operated per segment are related to the domestic traffic of the busiest states, exceptions being the non-scheduled and all-cargo segments.

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## 1. INTRODUCTION

For some years now STATFOR has a definition for air traffic market segments based on lists of aircraft types, aircraft operators and the ICAO flight types filed on flight plans. This categorization (section 2) has been generally accepted within EUROCONTROL and we use it in several reports and analysis to monitor and track the changes of the segments through time. In STATFOR's interactive dashboard ([SID](#))<sup>1</sup> it is possible to get a breakdown of the traffic per segment and get monthly updates per state and/or airport. As business models in aviation have significantly different patterns we want to contribute to a better perception of the different needs of the operators, know how they operate and how they behave in times of economic and political instability. An example is the dedicated report on Business Aviation with in depth analysis of the segment that was published in 2009<sup>2</sup> and updated through the form of briefings on a yearly basis.

In order to better understand the traffic trends in Europe, we found it important to elaborate this report on the market segments in aviation compiling the most relevant data from all the segments. Our aim is to provide a snapshot of the current traffic situation by presenting an overview of the traffic growth of the past six years (section 3) and by providing a more detailed analysis on 2013 traffic (section 4). The other goal is to refine STATFOR's business intelligence by providing a simple and effective mean of comparing the aviation segments and to help calibrating our own definition of these segments.

## 2. DEFINITIONS AND SCOPE

In traffic analysis, IFR flights can be grouped in several categories. The answers to “when, where and why they fly” (business model, mission type) and to “what they transport” (passengers, cargo) place them in different market segments. Based on rules matching specific criteria, STATFOR classifies the traffic in seven market segments:

- **Business aviation:** flights with a specific aircraft type (small aircraft) linked to ICAO flight type ‘G’ (not mandatory for all aircraft types)
- **Low-cost:** flights filed with ICAO flight type ‘S’ within low-cost operators or from/to specific airports
- **Traditional-scheduled:** flights with ICAO flight type ‘S’, excluding those falling into other categories
- **Non-scheduled:** flights with ICAO flight type ‘N’
- **Military IFR:** flights matching specific aircraft type, aircraft operator or ICAO flight type ‘M’
- **All-cargo:** flights with a specific aircraft type, call sign or aircraft operator linked to all-cargo operations
- **Other:** all the IFR movements that do not match the defined segments

The lists with the mentioned criteria are regularly updated and published in the SID<sup>3</sup>. Due to confidentiality reasons, military IFR and other types of flights appear as “**other**” in this report.

We understand that no definition is entirely accurate but the need is not for perfection at a single point in time but rather to have a usable definition that allows the segments to be tracked through time.

The report is divided into two parts. In section 3 we provide an overall view of the traffic segmentation within the EUROCONTROL Statistical Reference Area (ESRA)<sup>4</sup> from 2008 up until 2013 by presenting the distribution and yearly growth of the different segments on a yearly basis. All IFR flights are included in the analysis (departures, arrivals, domestic and overflights).

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<sup>1</sup> [www.eurocontrol.int/statfor/sid](http://www.eurocontrol.int/statfor/sid)

<sup>2</sup> [Business Aviation in Europe](#)

<sup>3</sup> [Market Segment Rules](#)

<sup>4</sup> A single area, consisting of a number of FIRs/UIRs, used as a reference by EUROCONTROL - see STATFOR FAQs <http://www.eurocontrol.int/faq/statfor>

In section 4 we analyse the current traffic situation (2013) based on the share of traffic for each market segment and also in growth terms (vs 2012). We found it relevant to introduce the segments share in the traffic zones (TZ)<sup>5</sup> within Europe (section 4.1), with a special section on the main states (section 4.2). We limited our analysis to three operational elements that we find important to characterize the segments: the aircraft type (section 4.3), the main airports (section 4.4) and the main airport pairs (section 4.5). Each section has the complementary table in the annexes with the most used elements per segment. The flight counts are based on arrivals and departures (international and domestic) and all the flights covered by the Network Manager (NM) area are included. This was particularly relevant in order to capture certain flows that are originated outside NM which have a significant weight on the European traffic.

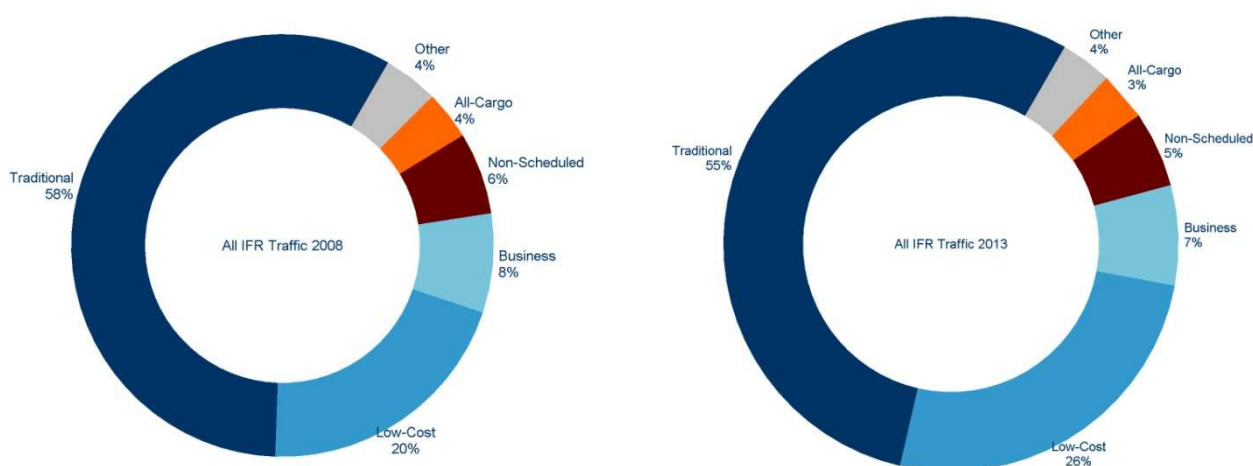
To avoid the leap year effect, all the growth calculations were made based on mean daily movements.

### 3. OVERVIEW 2008 - 2013

As mentioned in section 1, we found it important to start this report by presenting an overview of the traffic in terms of market segments over the past six years. We picked 2008 as our starting year due to the fact that this year registered the last peak (ever) on traffic before the start of the economic downturn in 2009. This allowed us to better understand the current traffic situation in 2013, which is covered in section 4.

#### 3.1 Traffic Distribution per Market Segment

Figure 1 Market segments share of all IFR flights (ESRA) in 2008 and 2013



In 2013, traditional-scheduled flights represent slightly more than half (55%) of all IFR flights in ESRA, as shown in Figure 1. The low-cost segment represents approximately a quarter of the traffic (26%). Compared to 2008, traditional-scheduled has 3 percentage points (pp) less of market share. Non-scheduled, business aviation and all-cargo have decreased 1pp each on the total traffic share from 2008 to 2013. In a period of six years, low-cost has gained 6pp of market share.

#### 3.2 Traffic Growth per Market Segment

Traditional-scheduled flights have always been the prevailing market segment in Europe. However,

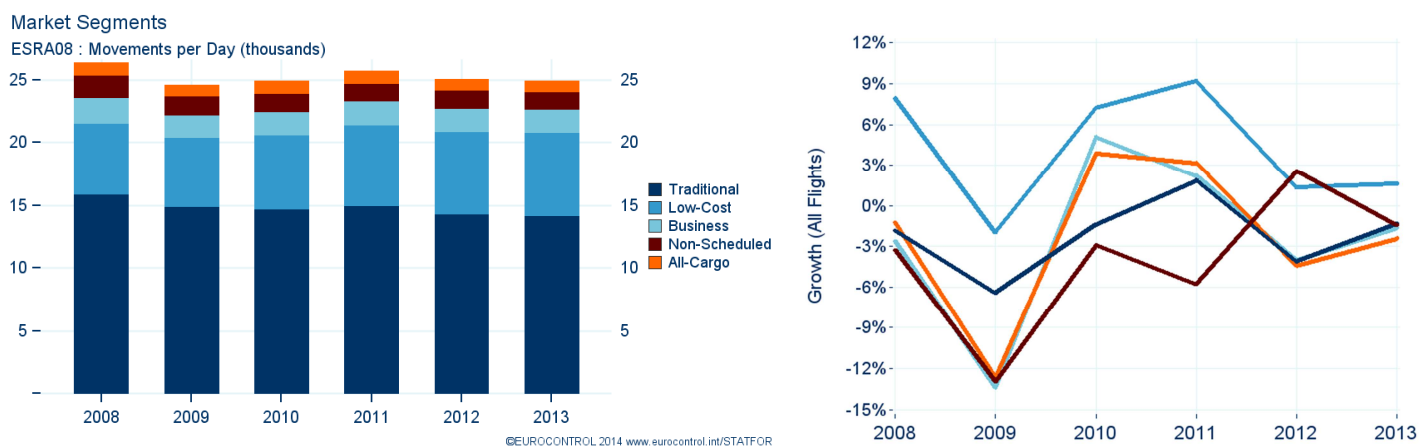
<sup>5</sup> Traffic Zone (TZ) consists of a FIR or a group of FIRs. It's independent of the country of origin of FIR. In most of the TZ equals the correspondent "State" - see STATFOR FAQs <http://www.eurocontrol.int/fag/statfor>

its overall weight is decreasing from year to year, mostly in favour of the low-cost carriers. Figure 2 relates to the period between 2008 and 2013 comprising the global economic and financial crisis of 2009 and its aftermath. This crisis had an impact in all the industries, and aviation was certainly not an exception. It was also a period with significant political instability, namely in North Africa and the Middle East, affecting important flows of European traffic. The total movements per day (all ESRA flights, including overflights) is shown on Figure 2 on the left, whereas on the right part, we have the yearly growth per segment.

From 2008 to 2013, these were the main changes in terms of traffic:

- All IFR traffic declined 6% from 27,500 to 25,800 Mvts/day
- Low-cost had a total of 18% growth, which translates into an increase of about 1,000 Mvts/day
- Traditional-scheduled saw a decrease of 11%, meaning 1,700 less Mvts/day
- The other segments presented declines greater than 10% each with non-scheduled being the most affected (-19%)

**Figure 2 Flights per day and flight growth in ESRA 2008-2013**



Note: "Other" excluded from total counts

The year 2009, with an overall traffic decrease of 6.4% was the worst year ever<sup>6</sup> for European air traffic, breaking abruptly the continuous growth of the past decade when traffic had an average yearly growth of 3.6% from 2003 up to 2008.

Overall, 2010 and 2011 registered growth in traffic, in spite of the events of April 2010 when the volcanic eruption in Iceland occurred, grounding much of the traffic in Europe for several days. This growth revealed a moderate adaptation of the industry to the crisis.

On the other hand, 2012 and 2013 were years of decline in European traffic, showing that the aftermath of the 2009 crisis was longer than expected.

The market segments had different behaviours during the 2008-2013 period:

- Traditional-scheduled recorded traffic reductions every year, exception being 2011,
- Low-cost, on the contrary, presented growth in each of the last six years,
- Business aviation and all-cargo, traditionally the most sensitive segments to economic changes, presented growth in 2010 and 2011 and decline in the two following years, with some signs of recovery by the end of 2013,
- Non-scheduled flights registered traffic decrease in 2010 and 2011. It then recovered in 2012 and again declined in 2013.

<sup>6</sup> Since traffic growth has been recorded in our data warehouse (1960)

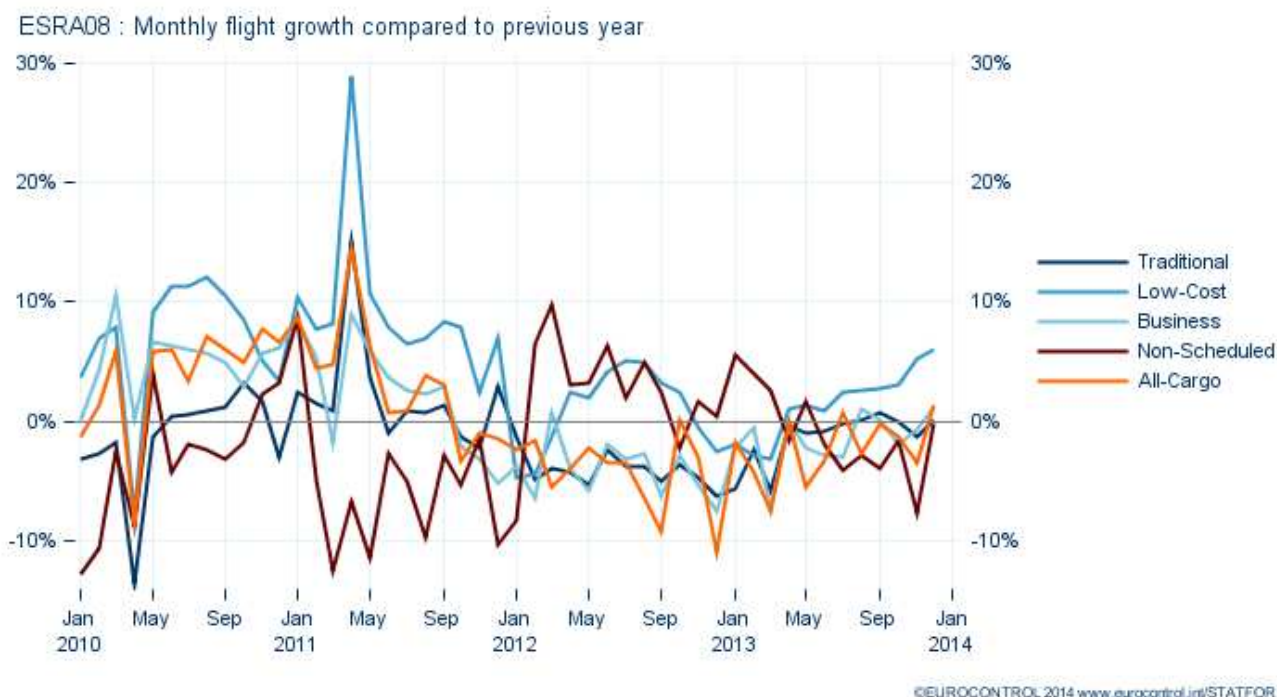
**Figure 3 Monthly flight growth Jan2010 – Dec2013 (year on year)**

Figure 3 shows the monthly growth versus the same month of the previous year from January 2010 to December 2013 (all ESRA flights, including overflights). The fluctuations in the traffic growth per segment often reflect events occurring during this period.

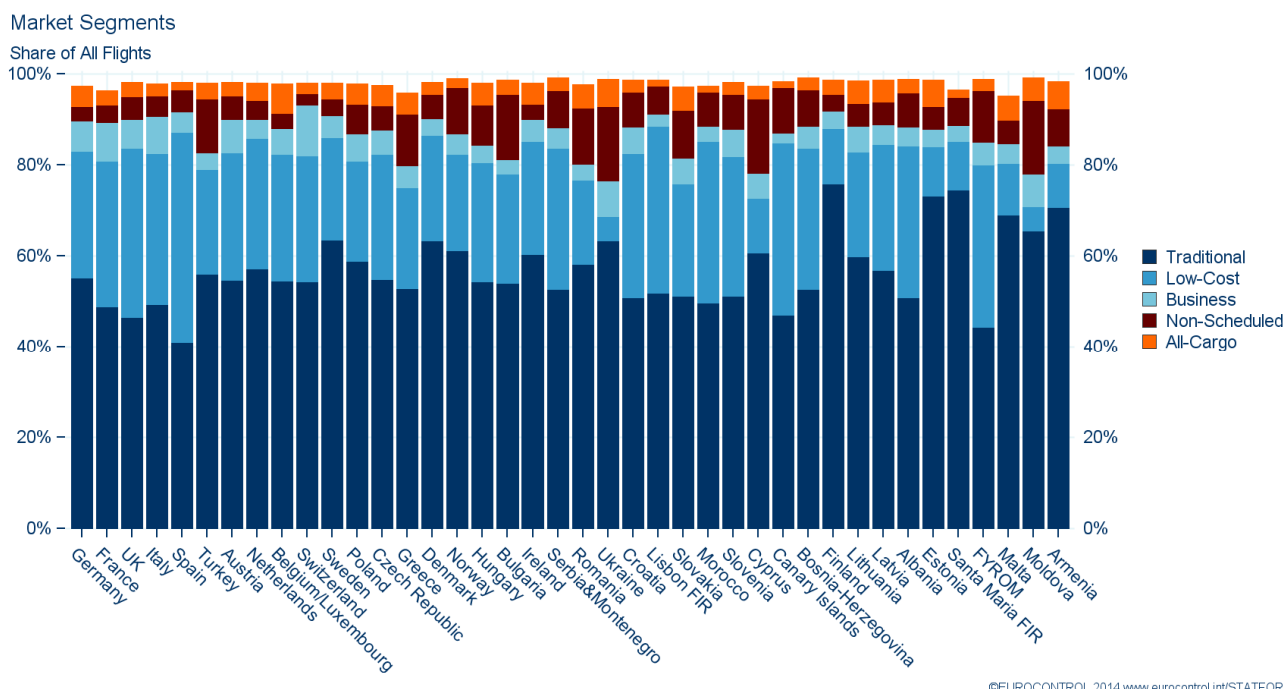
- Traditional-scheduled, business aviation and all-cargo flights presented similar trends. Their monthly growth had very similar values throughout the four years, with small variation and contraction of the growth rates. Aside from the trough of April 2010 (due to the Eyjafjallajökull eruption) with a rebound at the same period of the following year; these three segments recorded the biggest drop on traffic during the winters of 2011/2012 and 2012/2013.
- The low-cost segment presented a similar pattern to the segments mentioned above, even if in this case the growth stays positive most of the time, exceptions being the periods mentioned before when the troughs in traffic occurred. In 2012, this segment recorded positive growth throughout the summer months, traffic that was mostly taken from the traditional-scheduled.
- The non-scheduled segment was showing some recovery towards the end of 2010 when the North African uprisings took place, diverting tourism from the region. In 2011 it registered a total decline of 5.8% against the 3.2% increase for all IFR flights. In 2012, the segment ended with growth but this was seen as a natural compensation of the slump of the previous year rather than any actual improvement of the sector.
- In 2013 and despite the increasing growth of the low-cost segment, there was more correlation among the segments in terms of monthly growth than what was verified in the previous years.

## 4. MARKET SEGMENTS IN 2013

In this section our aim is to give a more up-to-date view of the market segments in Europe. We use 2013 as our reference date since it is the most recent year with total data coverage. Traffic growth is calculated on 2012.

### 4.1 State by State Traffic Distribution

Figure 4 Market segments share of daily flights per State (TZ) <sup>7</sup>



In this section we first analyse the share of flights per traffic zone (TZ) in 2013 (all flights, including overflights). In Figure 4 the TZs are sorted by decreasing number of total flights. Different typologies in the market segments from state to state are observed:

- Most of the states have a higher share of traditional-scheduled but there are some TZs where the low-cost segment is already representing the largest share of the traffic.
- The Scandinavian states are those with the highest share of traditional-scheduled, with Finland reaching the maximum among all states (76%).
- The one with the highest percentage of low-cost is Spain with 46% (5pp more than traditional-scheduled). The UK has also a great share of low-cost flights (37%) compared to 46% of traditional-scheduled. Other states with a strong low-cost presence are the Canary Islands (38%) and FYROM (36%).
- Business aviation has a significant share in the four busiest states - UK (6%), Germany (7%), France (9%) and Italy (8%) - but its biggest share per state is found in Switzerland (11%).
- Non-scheduled is almost non-existent in some states like Switzerland (1%), but it still plays an important role in the market composition of states like Ukraine, Moldova and Cyprus (16%). This traffic is mainly linked to the major tourist flows in Europe, linking the north of Europe or Russia to the Mediterranean.

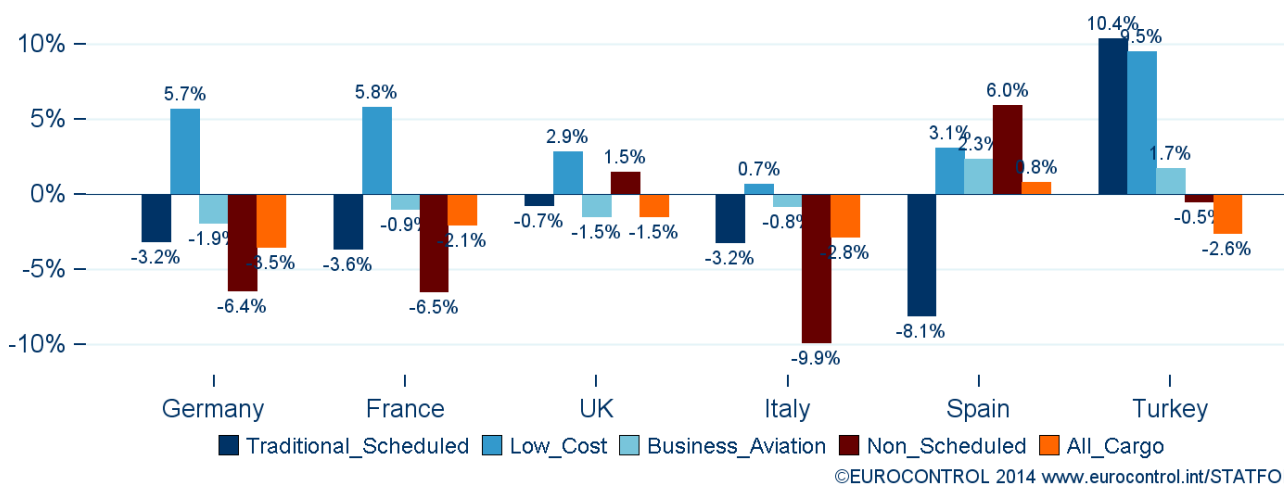
<sup>7</sup> Data for Azerbaijan, Belarus, Iceland and Georgia does not contain a complete coverage of the criteria needed for the market segment definition reason why these states are not covered in this section

## 4.2 Traffic Distribution and Growth in the Busiest States

In this section we do a “zoom in” the six busiest states identified in Figure 4.

**Figure 5 Flight growth (2013 vs 2012) by market segment – busiest states**

### Traffic Growth 2013

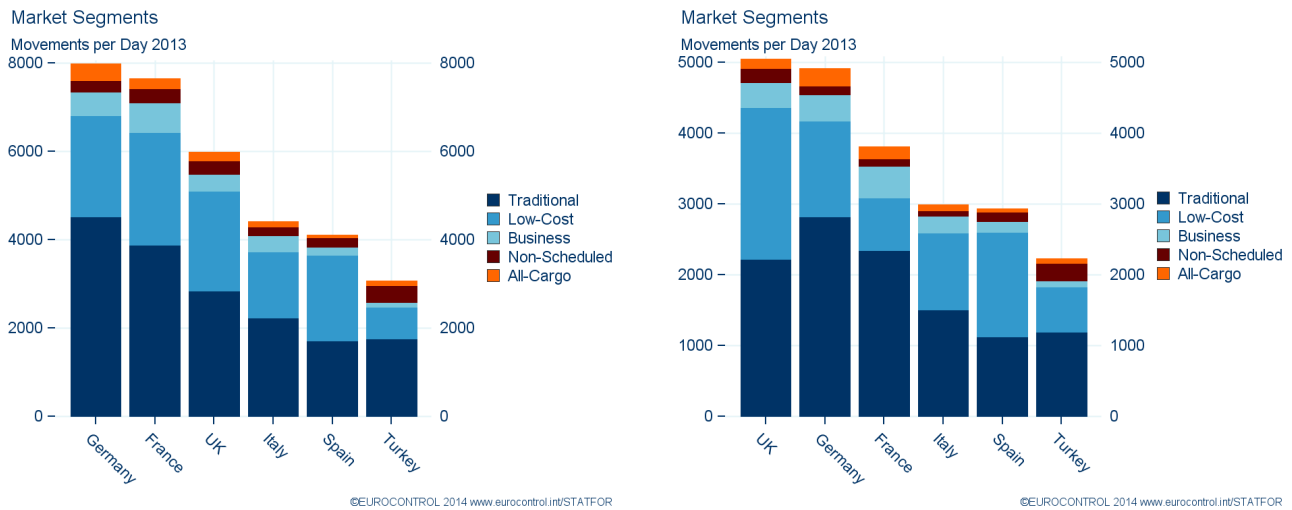


In Figure 5, we separate the growth per segment. With the exception of Turkey, the traditional-scheduled segment registered reduction in all the states. Low-cost, on the contrary, saw growth in the six TZs. Business aviation was the segment that remained relatively stable throughout these countries.

- Turkey had the highest growth per segment with its traditional-scheduled and low-cost segments reaching 10% of growth, each.
- Spain, with a great reduction in terms of traditional-scheduled had a 6% increase in non-scheduled. This was probably due to the shift of the non-scheduled traffic from Egypt following the political instability in the region.
- Italy recorded declines for all the segments, exception being the low-cost one.



**Figure 6 Flights per day in main TZs - 2013**



All flights ("Other" excluded)

Local traffic<sup>8</sup> ("Other" not counted)

Figure 6 shows the average movements per day in 2013 within the six busiest traffic zones in terms of total traffic, including (left-hand side) and excluding (right-hand side) overflights.

In terms of all flights, Turkey and Germany are those with the highest shares of traditional-scheduled overflights (56% and 55%, respectively).

In terms of local traffic:

- The UK, the main contributor to European traffic in 2013, has 2,100 low-cost Mvts/day,
- France has the highest share of traditional-scheduled movements (58%), representing 2,300 Mvts/day. France is the TZ with the lowest share of low-cost traffic (18%) out of the "top 6",
- Turkey has the highest share of non-scheduled traffic, 18%, representing the highest number in Europe for this segment: 240 Mvts/day,
- Germany is the busiest TZ for all-cargo traffic, with 251 Mvts/day,
- Business aviation has its greatest share in France, where it counts 450 Mvts/day.

Considering these shares and the growth the segments are experiencing in the six busiest TZs, two important trends are observed in today's European traffic:

- Turkey, as the main driver for passenger traffic growth,
- Low-cost, as the segment with greatest growth potential even in markets where it has already a great share of the traffic like Spain and UK.

<sup>8</sup> It includes arrivals, departures and internal flights. Overflights are excluded.

### 4.3 Main Aircraft Types

The aircraft used by an operator is a typical characteristic of a market segment. This represents one of the criteria used by STATFOR in the market segments definition.

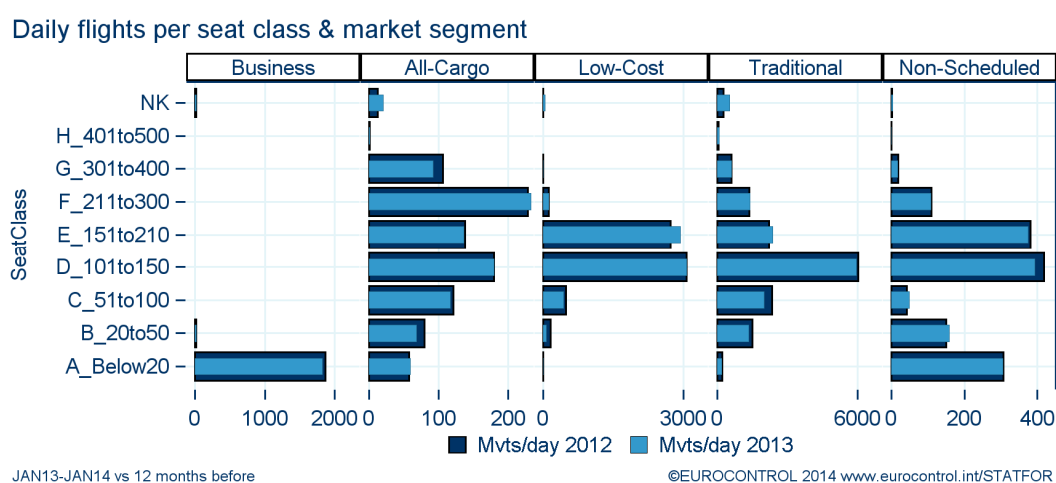
An aircraft type has a typical number of available seats linked to it. This number varies from airline to airline and this is the reason why we use here the median seats per aircraft type as our “capacity” indicator. These are grouped in seat classes to ease the comparisons.

Figure 7 shows the distribution of aircraft movements per seat class and market segment for 2013 and 2012 in the area covered by NM. Although the all-cargo segment does not transport passengers we decided to include it here as the seat class gives us a good perception of the dimension of the aircraft in use.

- Low-cost and non-scheduled both have a median of 150 seats in 2013, revealing a preference for aircraft with high seat availability
- Traditional-scheduled has a median of 137 seats but a wider distribution in terms of seat preference
- Business aviation has a median of 10 seats per aircraft with a maximum of 50 seats for that segment.
- As expected, all-cargo is the segment using mostly the largest aircraft on the market

In terms of changes, an immediate observation is that smaller size classes saw a decrease on aircraft movements in 2013 compared to 2012 and some of the larger classes gained movements. This is particularly visible on the low-cost and traditional-segments which presented a decrease on class D (101 to 150 seats) and an increase on class E (151 to 210 seats) movements.

**Figure 7 Aircraft size per seat class and market segment in 2013 vs 2012 (All flights)**



We can assume that there is an increasing need for the use of larger aircraft, possibly motivated by cost-cutting strategies of the airlines. This conclusion is supported by the known fact that the number of passengers is increasing more than the number of flights.

The tables in annex A refer to the “Top 10” aircraft used for each of the market segments in 2013, ranked by the decreasing average flights per day.

An interesting fact observed on the tables is that, the most used aircraft types by the traditional-scheduled segment recorded an increase of flights while the segment itself registered a decrease in traffic (see 3.2). This reveals another strategy of the airlines that are more and more opting for simplifying their fleet. This is already a known characteristic of the low-cost segment which highly relies on fleet’s standardization.

Despite the significant traffic growth in 2013, low-cost segment had some aircraft types showing a reduction in aircraft movements, namely those of the D class (101 to 150 seats), again revealing a trend towards giving preference for larger aircraft by the operators.

### 4.4 Main Airports

Each market segment has a very specific type of operations and good example of this is the hub system chosen by the aircraft operators. In our analysis, we identified some of the needs of the operators when choosing an airport to concentrate their operations:

- Location of the aerodrome for the business aviation,
- Hub and transfer capabilities for the traditional-scheduled,
- Logistic facilities and night operations for all-cargo,
- Secondary (lower taxed) airports for the low-cost,
- Airports serving holiday destinations for the non-scheduled.

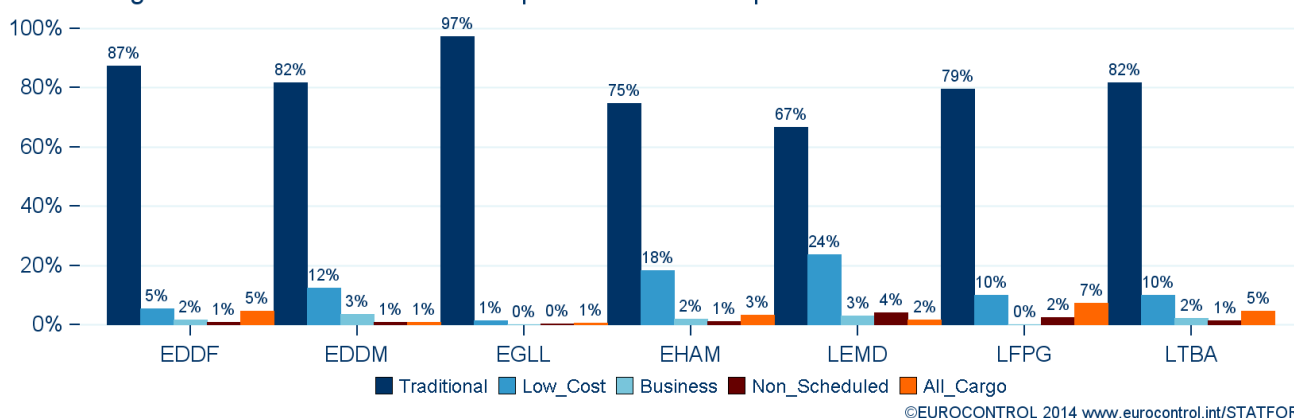
From an airport’s perspective it is interesting to observe that the busiest airports in Europe (Figure 8) tend to absorb mainly traditional-scheduled movements and only a few of them have significant percentages of low-cost movements or other traffic (Amsterdam and Madrid).

Heathrow operates almost exclusively traditional-scheduled flights whereas Frankfurt, Paris-Charles de Gaulle and Istanbul-Ataturk do have significant shares of all-cargo.

Business aviation and non-scheduled are underrepresented at the busiest airports, especially when compared to their percentages of overall traffic in Europe: 7% and 5%, respectively (see Figure 1).

**Figure 8 Segment distribution in main airports 2013**

Market Segment Distribution 2013: Main Airports : Arrivals + Departures



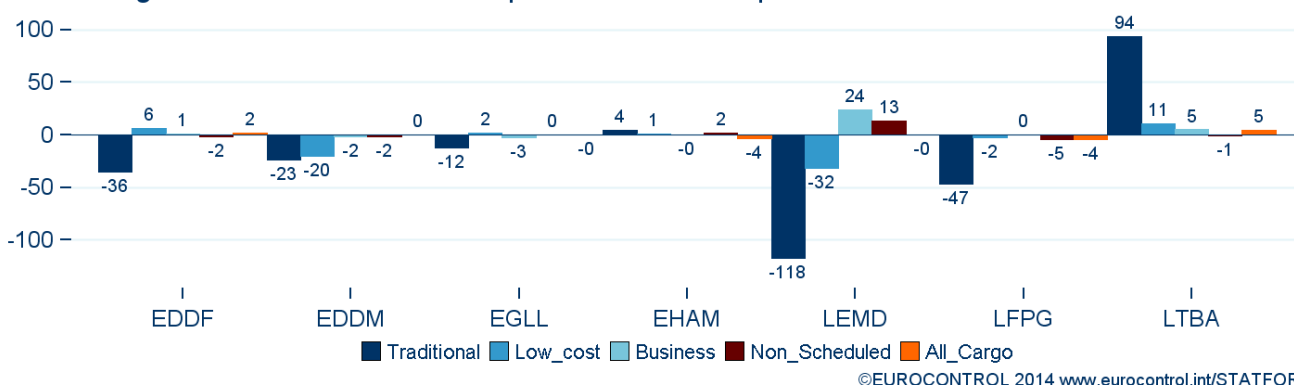
The segregation is more visible when looking at a regional level where each airport of a same aream tends to specialise in a particular type of traffic.

The region of London is a good example, with Gatwick serving non-schedule and low-cost traffic, Stansted serving low-cost and all-cargo, Heathrow traditional-scheduled and Luton and Biggin Hill the business aviation. Other examples are Paris, Rome and Istanbul areas. Madrid is the exception, concentrating all types of traffic on its main airport, Barajas.

The previous conclusions are easily observed in the tables of Annex B. Following the same method as in the previous section we ranked the “top 15” airports per market segment by calculating the average movements per day, the share within the segment and the growth on the previous year.

**Figure 9. Change in average daily flights in main airports 2013 vs 2012**

Market Segment Growth 2013: Main Airports : Arrivals + Departures



In Figure 9 we present the change in terms of daily movements per segment in 2013 compared to 2012.

It is also a fact that airports are adopting strategies to overcome the effects of the economic crisis and the decrease of traffic of the past years. Some of these strategies also have an influence on the market segment distribution.

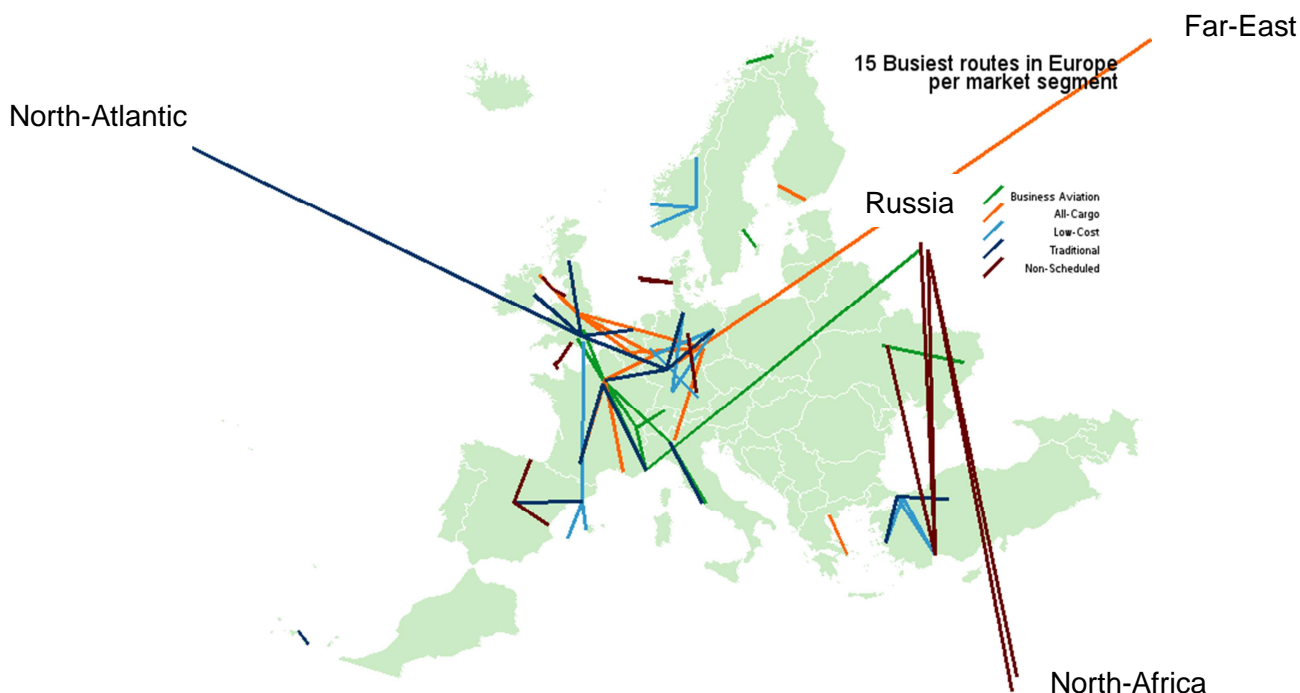
An example of these effects is Madrid's main airport with a great increase of business aviation and non-scheduled movements from 2012 to 2013. This was caused by the fact that in 2013, in order to optimize capacity and rationalize resources, the authorities moved the business aviation and non-scheduled traffic from the nearby airport of Madrid-Torrejón to Madrid-Barajas.

With the exception of Istanbul and Amsterdam, the total traffic decreased in the majority of these airports. The change per segment for main airports in Figure 9 is a good picture of what happened at TZ level. However, the growth observed for the low-cost in these airports is not representative of the growth of this segment in the corresponding TZs (see section 4.2), another indicator that other airports in the TZ are absorbing the low-cost traffic. Frankfurt is the only exception, with an increasing number of low-cost movements.

### 4.5 Main Airport Pairs

Following the airport analysis, we investigate the main bi-directional flows of traffic generated in European airports per market segment. The range of airport pairs within the same market segment is quite diverse geographically, especially in the traditional-scheduled and low-cost segment where the maximum share for the most flown airport pair within the segments is only 0.3% and 0.4%, respectively. Nevertheless, apart from the non-scheduled and all-cargo segments, the main routes operated represent the domestic traffic within the main states. The non-scheduled has a less central distribution, with a major eastern flow from Russia to the Mediterranean.

**Figure 10. Busiest airport pairs in Europe per market segment (bi-directional) in 2013**



Note: see tables in Annex C for share of the traffic per segment of the routes shown on the map

Information regarding the share of the flows and the growth can be found in Annex C. It is interesting to note that a considerable number of airport pairs of the business aviation and traditional-scheduled saw reductions of traffic. This can be linked to reasons already mentioned in this report (economic crisis, low-cost growth) but also to the competition from other transportation means than aviation, namely the high-speed train.

## A. MAIN AIRCRAFT TYPES

Figure 11. Top 10 Aircraft types per market segment in 2013

	Traditional-Scheduled				
	Aircraft Type	Mvts/day	Growth (%)	Share (%)	Typical Seats
1	A320	2384.2	2.7%	16.5%	150
2	A319	1409.9	3.3%	9.8%	124
3	B738	1124.1	12.0%	7.8%	167
4	A321	1028.4	2.0%	7.1%	186
5	E190	682.0	19.0%	4.7%	108
6	DH8D	432.3	3.7%	3.0%	72
7	B737	426.0	6.1%	3.0%	137
8	CRJ9	358.8	-9.2%	2.5%	86
9	E170	330.6	13.1%	2.3%	70
10	AT75	307.6	176%	2.1%	72
Other	-	-	-	41.1%	-

	Low-Cost				
	Aircraft Type	Mvts/day	Growth (%)	Share (%)	Typical Seats
1	B738	2664.5	8.3%	39.9%	167
2	A320	1284.9	12.4%	19.2%	150
3	A319	1194.6	-2.1%	17.9%	124
4	DH8D	353.1	-4.7%	5.3%	72
5	A321	200.6	7.5%	3.0%	186
6	B737	176.3	-12.7%	2.6%	137
7	B733	163.9	-22.1%	2.5%	137
8	E190	100.9	-8.8%	1.5%	108
9	B752	69.9	-14.3%	1.0%	183
10	E170	53.6	62.6%	0.8%	70
Other	-	-	-	5.9%	-

	Business				
	Aircraft Type	Mvts/day	Growth (%)	Share (%)	Typical Seats
1	BE20	159.8	2.8%	8.6%	14
2	C56X	150.2	-4.1%	8.1%	10
3	H25B	102.9	-4.2%	5.5%	8
4	F2TH	81.2	-0.4%	4.4%	19
5	C525	78.7	-1.8%	4.2%	7
6	CL60	78.0	2.3%	4.2%	19
7	C25A	69.4	-2.0%	3.7%	7
8	C510	68.4	8.8%	3.7%	6
9	GLF5	65.2	3.3%	3.5%	19
10	PC12	60.1	4.3%	3.2%	8
Other	-	-	-	50.9%	-

	Non-Scheduled				
	Aircraft Type	Mvts/day	Growth (%)	Share (%)	Typical Seats
1	A320	200.1	-1.4%	14.2%	150
2	B738	136.5	-8.8%	9.7%	167
3	A321	125.8	15.5%	8.9%	186
4	S92	118.1	6.5%	8.4%	19
5	B752	89.8	-5.7%	6.4%	183
6	B734	53.7	-15.8%	3.8%	144
7	A139	42.8	17.9%	3.0%	9
8	B733	38.1	-18.3%	2.7%	137
9	TRIS	38.0	0.2%	2.7%	18
10	AT72	33.2	31.9%	2.4%	66
Other	-	-	-	37.7%	-

	All-Cargo				
	Aircraft Type	Mvts/day	Growth (%)	Share (%)	Typical Seats
1	B733	110.0	-6.2%	12.2%	137
2	B752	95.2	1.1%	10.5%	183
3	B744	82.7	-7.1%	9.1%	390
4	ATP	51.6	5.4%	5.7%	64
5	MD11	51.1	-13.3%	5.6%	285
6	A306	46.4	69.3%	5.1%	267
7	B77L	44.4	19.1%	4.9%	266
8	B734	42.6	30.4%	4.7%	144
9	B763	36.5	1.8%	4.0%	229
10	A332	35.7	41.2%	3.9%	251
Other	-	-	-	34.1%	-

## B. MAIN AIRPORTS

Figure 12. Top 15 Airports per Market Segment in 2013

	Traditional-Scheduled I			
	Airport	Mvts/day	Growth (%)	Share (%)
1	LONDON/HEATHROW	1255.7	-1.0%	4.4%
2	FRANKFURT MAIN	1126.6	-3.1%	3.9%
3	PARIS CH DE GAULLE	1038.8	-4.3%	3.6%
4	SCHIPHOL AMSTERDAM	890.1	0.5%	3.1%
5	ISTANBUL-ATATURK	881.8	11.9%	3.1%
6	MUENCHEN 2	847.2	-2.7%	2.9%
7	ROME FIUMICINO	640.3	-1.1%	2.2%
8	MADRID BARAJAS	607.6	-16.2%	2.1%
9	ZURICH	545.4	-1.5%	1.9%
10	WIEN SCHWECHAT	489.2	-4.8%	1.7%
11	PARIS ORLY	487.1	-2.3%	1.7%
12	COPENHAGEN KASTRUP	483.3	-2.6%	1.7%
13	BRUSSELS NATIONAL	461.8	-5.0%	1.6%
14	STOCKHOLM-ARLANDA	444.1	10.5%	1.5%
15	OSLO/GARDERMOEN	396.1	1.9%	1.4%
Other	-	-	-	63%

	Low-Cost			
	Airport	Mvts/day	Growth (%)	Share (%)
1	LONDON/GATWICK	447.6	3.3%	3.4%
2	BARCELONA	435.0	-0.2%	3.3%
3	LONDON/STANSTED	328.7	0.7%	2.5%
4	PALMA DE MALLORCA	295.0	0.9%	2.2%
5	ISTANBUL/SABIHA	252.8	9.1%	1.9%
6	MANCHESTER	251.5	6.6%	1.9%
7	TEGEL-BERLIN	250.7	19.6%	1.9%
8	SCHIPHOL AMSTERDAM	219.0	0.3%	1.6%
9	MADRID BARAJAS	215.0	-13.0%	1.6%
10	OSLO/GARDERMOEN	209.0	5.5%	1.6%
11	DUBLIN	206.6	6.8%	1.6%
12	DUESSELDORF	200.7	5.5%	1.5%
13	ANTALYA	195.6	12.6%	1.5%
14	LONDON/LUTON	183.0	-2.1%	1.4%
15	MALAGA	174.8	5.0%	1.3%
Other	-	-	-	71%

Figure 13. Top 15 Airports per Market Segment in 2013 (cont.)

	Business					Non-Scheduled			
	Airport	Mvts/day	Growth (%)	Share (%)		Airport	Mvts/day	Growth (%)	Share (%)
1	PARIS LE BOURGET	127.6	-4.3%	3.4%	1	ANTALYA	166.0	-2.7%	6.1%
2	GENEVE COINTRIN	95.3	-2.7%	2.6%	2	MOSKVA/DOMODEDOVO	62.5	25.7%	2.3%
3	NICE	79.5	2.9%	2.1%	3	DEN HELDER/DE KOOY	53.2	-3.9%	2.0%
4	LONDON/LUTON	66.6	-1.8%	1.8%	4	STAVANGER/SOLA	46.5	2.3%	1.7%
5	MOSKVA/VNUKOVO	60.4	-1.9%	1.6%	5	BERGEN/FLESAND	45.3	6.1%	1.7%
6	ZURICH	58.3	-4.5%	1.6%	6	HURGHADA	44.0	-17.4%	1.6%
7	MILANO LINATE	52.7	-6.6%	1.4%	7	SHARM EL SHEIKH	40.6	-5.6%	1.5%
8	FARNBOROUGH CIV	52.7	0.4%	1.4%	8	PALMA DE MALLORCA	39.2	-4.9%	1.5%
9	ROMA CIAMPINO	45.6	-7.0%	1.2%	9	LONDON/GATWICK	38.3	-1.3%	1.4%
10	WIEN SCHWECHAT	40.3	-3.8%	1.1%	10	MADRID BARAJAS	37.8	55.2%	1.4%
11	KIEV - ZHULYANY	36.7	29.5%	1.0%	11	MANCHESTER	34.8	-5.0%	1.3%
12	MUENCHEN 2	36.0	-5.3%	1.0%	12	PARIS CH DE GAULLE	32.2	-12.3%	1.2%
13	STUTTGART	32.4	-0.6%	0.9%	13	GUERNSEY	31.4	-1.0%	1.2%
14	BIGGIN HILL	29.9	-2.8%	0.8%	14	NIKOS/KAZANTZAKIS	29.6	20.3%	1.1%
15	CANNES MANDELIEU	29.7	-0.1%	0.8%	15	TEL AVIV/BEN GURION	29.6	0.4%	1.1%
Other	-	-	-	77%	Other	-	-	-	73%

	All-Cargo			
	Airport	Mvts/day	Growth (%)	Share (%)
1	PARIS CH DE GAULLE	96.0	-4.0%	5.4%
2	LEIPZIG/HALLE	91.1	-2.2%	5.1%
3	KOELN-BONN	69.4	0.2%	3.9%
4	LIEGE/LIEGE	59.9	-2.2%	3.4%
5	EAST MIDLANDS	59.0	3.5%	3.3%
6	FRANKFURT MAIN	58.4	2.8%	3.3%
7	ISTANBUL-ATATURK	48.7	11.0%	2.7%
8	SCHIPHOL AMSTERDAM	40.4	-8.1%	2.3%
9	BRUSSELS NATIONAL	30.7	0.7%	1.7%
10	LUXEMBOURG	25.5	5.6%	1.4%
11	ATHINAI E. VENIZELOS	23.8	12.1%	1.3%
12	MARSEILLE PROVENCE	23.6	-2.4%	1.3%
13	LONDON/STANSTED	22.7	-2.3%	1.3%
14	BERGAMO/ORIO ALSERIO	22.6	-6.0%	1.3%
15	OSLO/GARDERMOEN	21.4	-13.7%	1.2%
Other	-	-	-	61%



## C. MAIN AIRPORT PAIRS

Figure 14. Top 15 Airport Pairs per market segment

	Traditional-Scheduled				
	Airport 1	Airport 2	Mvts/day	Growth (%)	Share (%)
1	ROME FIUMICINO	MILANO LINATE	42.5	-8.6%	0.3%
2	TOULOUSE BLAGNAC	PARIS ORLY	41.3	-1.7%	0.3%
3	ISTANBUL-ATATURK	ANKARA-ESENBAGA	38.6	0.3%	0.3%
4	LONDON/HEATHROW	DUBLIN	37.6	6.9%	0.3%
5	LONDON/HEATHROW	NEW YORK	37.3	3.7%	0.3%
6	LONDON/HEATHROW	SCHIPHOL AMSTERDAM	36.1	-1.0%	0.3%
7	FRANKFURT MAIN	LONDON/HEATHROW	34.6	-3.6%	0.2%
8	MADRID BARAJAS	BARCELONA	33.7	-15.4%	0.2%
9	NICE	PARIS ORLY	33.1	-5.8%	0.2%
10	LONDON/HEATHROW	EDINBURGH	29.9	3.3%	0.2%
11	LAS PALMAS	TENERIFE NORTE	29.8	-15.5%	0.2%
12	FRANKFURT MAIN	TEGEL-BERLIN	29.3	0.4%	0.2%
13	FRANKFURT MAIN	HAMBURG	28.8	0.3%	0.2%
14	ISTANBUL-ATATURK	IZMIR-ADNAN-MENDERES	28.5	0.5%	0.2%
15	FRANKFURT MAIN	PARIS CH DE GAULLE	27.5	-7.9%	0.2%
Other	-	-	-	-	95%

	Low-Cost				
	Airport 1	Airport 2	Mvts/day	Growth (%)	Share (%)
1	KOELN-BONN	TEGEL-BERLIN	28.9	76.6%	0.4%
2	ISTANBUL-ATATURK	IZMIR-ADNAN-MENDERES	27.0	-8.7%	0.4%
3	STUTTGART	TEGEL-BERLIN	23.6	92.2%	0.4%
4	ISTANBUL/SABIHA	IZMIR-ADNAN-MENDERES	23.3	5.2%	0.3%
5	ISTANBUL/SABIHA	ANTALYA	21.9	18.6%	0.3%
6	ISTANBUL-ATATURK	ANTALYA	20.6	6.9%	0.3%
7	TRONDHEIM/VAERNES	OSLO/GARDERMOEN	19.4	1.6%	0.3%
8	BERGEN/FLESLAND	OSLO/GARDERMOEN	19.4	1.8%	0.3%
9	PALMA DE MALLORCA	BARCELONA	19.4	-14.2%	0.3%
10	LONDON/GATWICK	BARCELONA	17.5	23.6%	0.3%
11	MADRID BARAJAS	BARCELONA	17.1	-11.2%	0.3%
12	STAVANGER/SOLA	OSLO/GARDERMOEN	16.4	0.5%	0.2%
13	BARCELONA	IBIZA	15.4	-2.8%	0.2%
14	HAMBURG	STUTTGART	15.4	78.9%	0.2%
15	DUESSELDORF	MUENCHEN 2	15.0	-1.4%	0.2%
Other	-	-	-	-	93%

Figure 15. Top 15 Airport Pairs per market segment (cont.)

	Business				
	Airport 1	Airport 2	Mvts/day	Growth (%)	Share (%)
1	PARIS LE BOURGET	GENEVE COINTRIN	10.3	-6.8%	0.6%
2	ROMA CIAMPINO	MILANO LINATE	8.0	-13.1%	0.4%
3	PARIS LE BOURGET	NICE	5.3	4.9%	0.3%
4	NICE	MOSKVA/VNUKOVO	5.2	3.6%	0.3%
5	NICE	GENEVE COINTRIN	5.1	-7.6%	0.3%
6	DONETSK	KIEV - ZHULYANY	4.3	22.8%	0.2%
7	GRONINGEN-EELDE	GRONINGEN-EELDE	3.8	-22.2%	0.2%
8	LONDON/LUTON	PARIS LE BOURGET	3.3	-4.4%	0.2%
9	STOCKHOLM/SKAVSTA	VISBY	3.3	-13.2%	0.2%
10	PARIS LE BOURGET	MILANO LINATE	3.0	-1.7%	0.2%
11	FARNBOROUGH CIV	PARIS LE BOURGET	2.8	0.6%	0.2%
12	ZURICH	GENEVE COINTRIN	2.8	-9.7%	0.2%
13	ALTA	TROMSO/LANGNES	2.8	4.6%	0.2%
15	RUSANGU	NA SAN	5.5	230%	0.3%
Other	-	-	-	-	89%

	Non-Scheduled				
	Airport 1	Airport 2	Mvts/day	Growth (%)	Share (%)
1	GUERNSEY	JERSEY	16.8	0.7%	1.2%
2	ANTALYA	MOSKVA/DOMODEDOVO	12.9	23.4%	0.9%
3	GUERNSEY	ALDERNEY	12.5	-0.3%	0.9%
4	ANTALYA	MOSKVA/SHEREMETYEVO	8.7	9.7%	0.6%
5	ESBJERG	DAN F (PRIVATE HELIDECK)	8.2	46.7%	0.6%
6	HURGHADA	MOSKVA/DOMODEDOVO	6.8	25.6%	0.5%
7	ESBJERG	GORM C (PRIVATE HELIDECK)	6.7	171%	0.5%
8	SOUTHAMPTON	ALDERNEY	6.6	1.9%	0.5%
9	SHARM EL SHEIKH	MOSKVA/DOMODEDOVO	6.3	33.3%	0.4%
10	BRAUNSCHWEIG	INGOLSTADT	6.1	147%	0.4%
11	BELFAST/CITY AIRPORT	ISLE OF MAN/RONALDSW	5.9	-6.4%	0.4%
12	ANTALYA	KIEV - BORISPOL	5.7	3.1%	0.4%
13	MADRID BARAJAS	VALENCIA	5.2	229%	0.4%
14	BLACKPOOL	ISLE OF MAN/RONALDSW	5.0	-10.7%	0.4%
15	MADRID BARAJAS	BILBAO	4.6	199%	0.3%
Other	-	-	-	-	79%

**Figure 16. Top 15 Airport Pairs per market segment (cont.)**

	All-Cargo				
	Airport 1	Airport 2	Mvts/day	Growth (%)	Share (%)
1	BELFAST/ALDERGROVE	EAST MIDLANDS	9.7	4.4%	1.1%
2	EAST MIDLANDS	EDINBURGH	7.0	0.7%	0.8%
3	LEIPZIG/HALLE	EAST MIDLANDS	6.9	15.0%	0.8%
4	KOELN-BONN	PARIS CH DE GAULLE	6.3	11.0%	0.7%
5	MARSEILLE PROVENCE	PARIS CH DE GAULLE	5.6	-3.7%	0.6%
6	MAKEDONIA	ATHINAI E. VENIZELOS	5.2	0.9%	0.6%
7	BRUSSELS NATIONAL	LEIPZIG/HALLE	5.1	2.0%	0.6%
8	KOELN-BONN	EAST MIDLANDS	5.0	6.9%	0.6%
9	FRANKFURT MAIN	KRASNOYARSK	4.6	20.4%	0.5%
10	INCHEON	FRANKFURT MAIN	4.6	2.1%	0.5%
11	LIEGE/LIEGE	EAST MIDLANDS	4.2	20.5%	0.5%
12	LEIPZIG/HALLE	BERGAMO/ORIO ALSERIO	4.2	-12.6%	0.5%
13	TOULOUSE BLAGNAC	PARIS CH DE GAULLE	4.0	-7.9%	0.4%
14	BERGEN/FLESAND	OSLO/GARDERMOEN	3.8	-6.8%	0.4%
15	HELSINKI-VANTAA	PORI	3.7	157%	0.4%
Other	-	-	-	-	86%

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For further information please contact,  
STATFOR, the EUROCONTROL Statistics and Forecast Service  
[statfor.info@eurocontrol.int](mailto:statfor.info@eurocontrol.int)  
<http://www.eurocontrol.int/statfor>



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