

Extra-EU air passenger transport

In brief

The total number of passengers transported by air between airports inside the EU and airports outside the EU (extra-EU transport) reached 250 million in 2006. The increase compared with 2005 was 5%. Extra-EU transport accounts for more than one third of all air passenger traffic from and to EU airports, which amounted to 738 million in 2006.

Of all world regions, America was the biggest partner region with 77.5 million air passengers accounting for 31% of all extra-EU air passenger traffic. This was closely followed by Europe other than EU-27 with 76.4 million passengers, just under 31% of all extra-EU air passenger traffic.

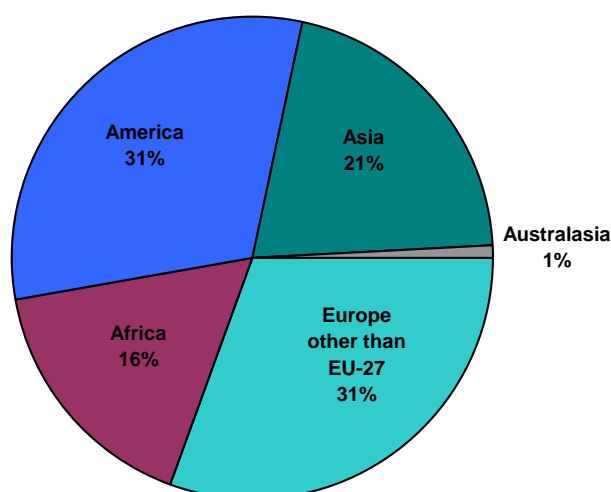
The fastest growing region in 2006 was the Indian sub-continent recording a growth of 21.5% compared with 2005. This was followed by East

Africa with 12.6% growth and the Near and Middle East with 9.1% growth. The only main region to record a decline was Australasia with -0.8%.

In 2006 the most significant partner country was the USA with 48.0 million air passengers. This country alone represents almost one fifth of all extra EU passengers. The second largest partner country was Switzerland with 22.4 million air passengers, almost 9% of all extra EU passengers, followed by Turkey with 21.2 million, more than 8% of all air passengers in this segment.

The highest seat occupancy rate on air passenger flows between the EU Member States and partner countries was 84.9%. This was recorded on services to/from the Dominican Republic. This was followed by routes to/from Guatemala at 84.1%.

Graph 1: Share of extra-EU* air passenger transport by world region in 2006



* EU-27 except Bulgaria

Extra-EU transport by world regions

Graph 1 analyses extra-EU air transport in 2006 (excluding Bulgaria for which data is not available) by main world region.

America and Europe other than EU-27 account for 31% each followed by Asia with 21%, Africa with 16% and Australasia with 1%. The Australasian market is however likely to be understated, as transit passengers are not included in the number of passengers carried (see the explanation below related to Table 1).

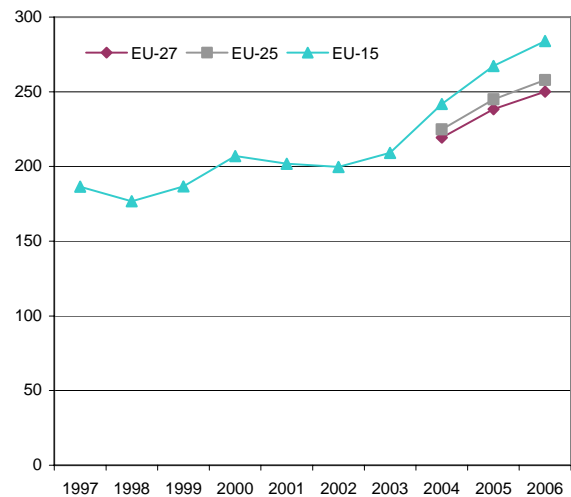
Graph 2 shows the growth in the Extra-EU air passenger market over the ten years up to 2006. This is a significant market for EU Member States accounting for 33% of all air passenger traffic.

The extra-EU-25 passenger transport is higher than extra-EU-27 passenger transport: this can be explained by the fact that the transport reported by the EU-25 countries to/from Bulgaria and Romania is higher than transport between these two countries (data from Bulgaria are not available) and the extra-EU-27 countries.

Traffic levels were depressed in 2002 and 2003 following the 11th September 2001 events. A strong recovery was observed from 2004, but some caution should be observed when interpreting these trends as

figures for Greece were not available for 2001 and 2002.

Graph 2: Evolution of total extra-EU passenger transport (in million passengers)*



* See methodological notes for information on the EU-15, EU-25, and EU-27 coverage.

Table 1: Share of extra-EU air passenger transport by world region and sub-regions

	2006 ⁽¹⁾					1st half 2007	
	Number of passengers carried (in 1000)	Growth 2005-2006 (in %)	Share in the region	Share in extra-EU transport	Number of passenger flights (in 1000)	Number of passengers carried (in 1000)	Number of passenger flights (in 1000)
Europe other than EU-27	76 363	4.3			892	37 241	444
European Republics of the Ex-USSR	11 922	8.6	16%	5%	150	6 049	79
Other European countries	64 441	3.6	84%	26%	742	31 192	365
Africa	41 035	5.1			314	20 559	160
Central Africa	732	3.8	2%	0%	6	365	3
East Africa	2 309	12.6	6%	1%	12	1 128	6
North Africa	27 768	5.0	68%	11%	234	13 867	120
Southern Africa	6 018	3.4	15%	2%	33	3 091	17
West Africa	4 207	4.7	10%	2%	30	2 109	15
America	77 544	2.1			405	37 658	206
Central America and Caribbean	11 162	2.6	14%	4%	82	5 551	45
North America	56 913	1.6	73%	23%	280	27 341	139
South America	9 468	4.5	12%	4%	43	4 767	22
Asia	52 188	9.2			284	26 859	144
Asian Republics of the Ex-USSR	1 232	1.8	2%	0%	13	598	6
Far East	24 914	6.5	48%	10%	102	12 511	52
Indian Sub-Continent	7 205	21.5	14%	3%	37	3 878	19
Near and Middle East	18 837	9.1	36%	8%	132	9 872	66
Australasia	1 871	-0.8			1	883	0
Australasia, South Sea Islands & Antarctica	1 871	-0.8	100%	1%	1	883	0
Total Extra-EU	250 187	5.0			1 930	123 476	972

¹ in 2006, EU-27 except Bulgaria

Table 1 examines the importance of the partner regions and sub-regions in terms of passenger transport and passenger carrying flights for 2006, as well as the trend observed for the first half of 2007.

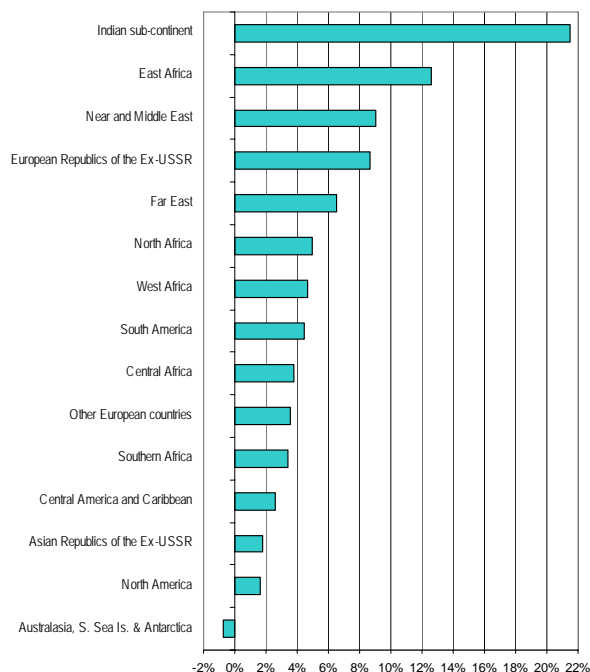
The largest sub-region in 2006 was for Other European countries (mainly, Switzerland, Turkey and Norway) which accounted for 26% of all extra-EU air passenger traffic. This was followed by North America with 23%, and North Africa with its high proportion of

leisure passengers accounted for 11%. The figures for the first half of 2007 indicate the same three main regions.

The number of passengers carried displayed in Table 1 does not include transit passengers. This will result in the Australasian market being understated, as a passenger travelling from Paris to Sydney but changing planes at Singapore will be allocated to the Far East.

Passenger flights represent stage flights i.e. the operation of the aircraft from take-off to first landing. This means that a flight travelling Amsterdam – Hong Kong – Melbourne will be allocated to the Far East

Graph 3: Growth of extra-EU passenger transport between 2005 and 2006 by sub-region*



* EU-27 except Bulgaria

Extra-EU transport by partner country

Table 2: Top-25 EU partner countries in terms of passengers carried in 2006 (including data for the first half of 2007)*

Rank	Partner Country	Region	2006 annual data				1st half 2007			
			Number of passengers carried (in 1000)			Growth 2005-2006 (in %)	Share in total extra-EU27	Number of passengers carried (in 1000)		
			Scheduled	Non-Scheduled	Total			Scheduled	Non-Scheduled	Total
1	USA	North America	46 924	1 089	48 014	1.7	19.2%	22 864	412	23 276
2	SWITZERLAND	Other European countries	21 393	989	22 382	12.1	8.9%	11 462	460	11 923
3	TURKEY	Other European countries	10 130	11 084	21 214	-10.9	8.5%	5 069	3 951	9 021
4	NORWAY	Other European countries	11 050	1 592	12 641	13.9	5.1%	5 721	739	6 460
5	EGYPT	North Africa	3 445	6 088	9 533	-1.0	3.8%	2 032	3 172	5 204
6	RUSSIAN FEDERATION	European Republics of the Ex-USSR	7 569	1 324	8 893	9.8	3.6%	4 065	485	4 550
7	CANADA	North America	8 207	448	8 655	1.7	3.5%	3 799	143	3 943
8	TUNISIA	North Africa	2 889	5 616	8 505	3.8	3.4%	2 010	1 491	3 501
9	UNITED ARAB EMIRATES	Near and Middle East	6 669	88	6 757	18.0	2.7%	3 685	79	3 765
10	MOROCCO	North Africa	4 967	1 638	6 605	17.4	2.6%	3 344	373	3 717
11	CHINA (excluding HONG KONG)	Far East	5 383	2	5 386	12.4	2.2%	2 665	1	2 666
12	JAPAN	Far East	5 176	33	5 209	-0.8	2.1%	2 474	1	2 475
13	INDIA	Indian Sub-Continent	4 843	268	5 111	25.6	2.0%	2 684	171	2 855
14	ISRAEL	Near and Middle East	3 748	1 008	4 757	5.1	1.9%	2 001	384	2 385
15	THAILAND	Far East	4 068	95	4 163	9.8	1.7%	2 208	83	2 291
16	BRAZIL	South America	3 773	284	4 057	-2.3	1.6%	1 931	134	2 065
17	SOUTH AFRICA	Southern Africa	3 442	13	3 455	4.5	1.4%	1 731	7	1 738
18	HONG KONG	Far East	3 194	0	3 194	14.3	1.3%	1 659	1	1 661
19	SINGAPORE	Far East	3 061	16	3 077	7.2	1.2%	1 488	5	1 492
20	MEXICO	Central America and Caribbean	2 189	809	2 998	8.6	1.2%	1 090	323	1 413
21	CROATIA	Other European countries	2 152	779	2 931	16.7	1.2%	1 093	153	1 246
22	DOMINICAN REPUBLIC	Central America and Caribbean	1 617	1 275	2 892	-1.5	1.2%	935	520	1 455
23	ALGERIA	North Africa	2 551	100	2 651	3.2	1.1%	1 187	19	1 207
24	UKRAINE	European Republics of the Ex-USSR	2 023	137	2 160	21.3	0.9%	1 070	64	1 134
25	CUBA	Central America and Caribbean	1 403	449	1 852	-4.0	0.7%	688	192	880

* In 2006, EU-27 except Bulgaria

Table 2 highlights the top 25 EU partner countries in 2006. The USA was by far the largest partner country

and not Australasia. The top partner regions in terms of number of flights are comparable to those for the number of passengers, the main difference before Far East.

The total number of passengers carried on extra-EU air services was 250.2 million, a growth of 5.0% compared with 2005.

The world sub-region showing the greatest increase in passenger traffic was the Indian sub-continent with a 21.5% rise in passengers. This is partly accounted for by strong economic growth in India. The second highest increase, 12.6%, was recorded on services to/from East Africa, mainly due to the flows with Kenya, Ethiopia and Uganda.

The lowest growth observed was for North America, the second largest market accounting for 23% of all air passengers in this sector, with only 1.6% growth recorded.

The apparent decline in passengers to/from Australasia may be due to the way that passengers are counted. The 'fall' may be due to an increase in passengers choosing to change planes en-route rather than taking direct flights to this world region or to a reduction in the number of direct connections to/from the EU.

with almost 48 million air passengers showing the strength of the trans-Atlantic air market. At 19% of the

whole extra-EU market this represents more than twice the size of the second biggest partner. Switzerland was in second place with 22.4 million passengers followed by Turkey, with its high leisure traffic of 21.2 million passengers coming in third place.

Other significant leisure destinations also appear in the top 10, notably Egypt in 5th position and Tunisia in 8th position. Results for the first half of 2007 show the same ranking for the top 7 countries.

Table 3: Highest growths between 2004 and 2006 for routes with EU partner countries with more than 10 thousand passengers annually (in 1000 passengers)

Rank	Partner Country	Growth 2005-2006	Growth 2004-2006
1	BOLIVIA	127.9%	419.2%
2	PANAMA	58.7%	238.8%
3	LIBERIA	23.6%	192.4%
4	QATAR	38.6%	96.2%
5	SUDAN	27.1%	91.0%
6	ARMENIA	16.0%	68.5%
7	MOLDOVA	10.3%	63.8%
8	UGANDA	51.6%	61.8%
9	INDIA	25.6%	57.2%
10	CROATIA	16.7%	54.3%
11	COLOMBIA	22.8%	54.1%
12	URUGUAY	11.9%	53.4%
13	PERU	11.3%	52.2%
14	ECUADOR	20.7%	50.0%
15	SIERRA LEONE	10.1%	49.5%
16	NAMIBIA	19.5%	49.4%
17	COSTA RICA	21.7%	45.1%
18	BAHAMAS	8.9%	44.8%
19	ALBANIA	17.1%	44.2%
20	UKRAINE	21.3%	42.8%
21	MOROCCO	17.4%	41.4%
22	CAPE VERDE	28.2%	38.4%
23	CHINA	12.4%	38.3%
24	UNITED ARAB EMIRATES	18.0%	34.4%
25	DEMOCRATIC REPUBLIC OF THE CONGO	15.6%	34.1%

Although the number of passengers to and from Bolivia was relatively small in 2006 (some 73,000), the growth of 128% compared to 2005 was the highest for any partner country. Over two years the growth was more than four-fold. Panama and Liberia also showed large percentage increases over a two-year period, 239% and 192% respectively.

In addition to Panama, five other South American partner countries saw strong growth compared to 2004. Passenger numbers recorded for Colombia grew by 54%, for Uruguay by 53%, for Peru by 52%, for Ecuador by 50% and for Costa Rica by 45%. Depending on the country, migratory and increasing tourism flows may explain these growths.

Continuing strong growth in the emerging economies of two trading partners saw passenger traffic to and from India grow by more than half compared to 2004 whilst over the same period traffic between the EU and China rose by 38.3%.

The number of passenger flights does not produce the same ranking as the passenger numbers. For example, there are more flights and less passengers to and from Switzerland than there are to and from the USA. The explanation for this is the use of lower capacity short-haul aircraft on Swiss routes.

The fact that the figures concern stage flights may result in the understatement of flights attributed to the start or end points on flights with more than one stop.

Table 4: Horizontal Agreements between the EU and third countries

Country	Date of signature of the Horizontal Agreement
Chile	06/10/2005
Ukraine	01/12/2005
Moldova	11/04/2006
Georgia	03/05/2006
Albania*	05/05/2006
Bosnia and Herzegovina*	05/05/2006
Croatia*	05/05/2006
Serbia*	05/05/2006
Montenegro*	05/05/2006
Former Yugoslav Rep. of Macedonia*	09/06/2006
Singapore	09/06/2006
New Zealand	21/06/2006
Lebanon	07/07/2006
Maldives	21/09/2006
Uruguay	03/11/2006
Morocco**	12/12/2006
Paraguay	22/02/2007
Malaysia	22/03/2007
United States of America**	30/04/2007
Kyrgyzstan	01/06/2007
Panama	01/10/2007
United Arab Emirates	30/11/2007
Jordan	25/02/2008
Australia	29/04/2008

* Members of the European Common Aviation Area (ECAA)

** Open Skies agreements

Source: European Commission, DG Energy and Transport

Table 4 highlights the Horizontal Agreements between the EU and third countries. A horizontal agreement is

an agreement negotiated by the Commission on behalf of the Member States, in order to bring all existing bilateral air services agreements between Member States and a given third country in line with Community law. These agreements do not necessarily have an impact on the traffic growth because even if they enable any EU carrier irrespective of the nationality to operate a route with the third country, this still takes place with the restrictions stipulated in the former bilateral agreements. Only an "Open Sky" type of agreement goes further than a plain horizontal agreement removing all capacity restrictions. This is the case for the agreements signed with the USA and Morocco.

Table 5 presents the routes with the highest average occupancy rate (Load Factor) in 2006. It should be noted that data for France, Greece and Bulgaria are not included in this table.

The three extra-EU partner countries for which the occupancy rate on the flights to/from EU was the highest in 2006 belong to the region "Central America and Caribbean". Half of the top-10 countries in this respect are located in this particular region.

The highest seat occupancy rate was observed on routes to and from the Dominican Republic with 84.9%. This is a predominantly leisure destination served by non-scheduled services which traditionally operate with a higher load factor than most scheduled services.

Other leisure destinations featured in this table include the Maldives with 82.6% average occupancy rate, Tunisia with 80% occupancy rate, South Africa with 79.3% occupancy rate and Mauritius with 79.2% occupancy rate.

In Table 5, the most significant partner country in terms of the volume of passenger traffic is Turkey with

19.9 million air passengers and a seat occupancy rate averaging 77.9%. The second most significant country was Egypt with 8.7 million air passengers and a seat occupancy rate of 78.8% and the third most significant country was Canada with 7.1 million air passengers and a seat occupancy rate of 82.7%.

These statistics relate to flight stage data, where the capacity offered and the passengers on board are recorded on the stage of a flight between EU Member States and countries outside the EU.

Long-haul destinations such as Australia and New Zealand do not feature in this table. Because of the long distances involved, non-stop services between the EU and these countries are not frequent. The data for these routes will be included in the country in which the first intermediate landing is made.

For the reasons above, the total of passengers by individual country recorded in this table will not be the same as those shown in Table 2 which records passengers to the point of embarkation or disembarkation.

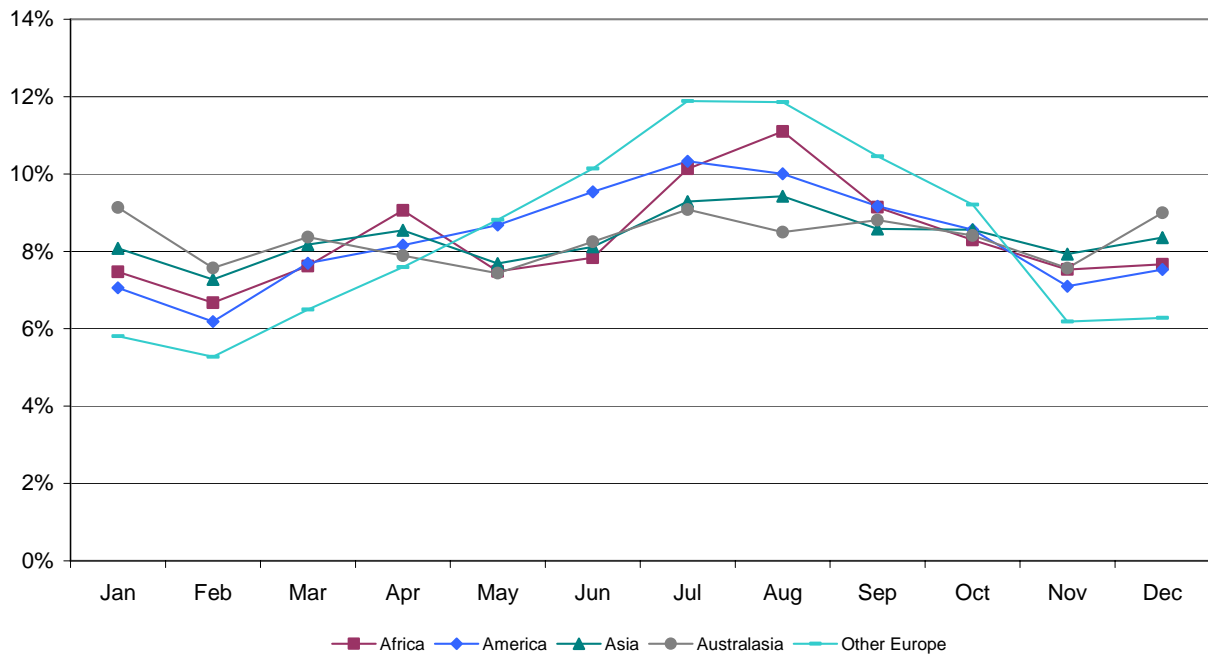
Table 5: Highest occupancy rates for the routes between EU¹ and partner countries (with more than 10 000 passengers annually) in 2006

Rank	World sub-region	Partner country	Number of passengers on board (in 1000)	Seats available (in 1000)	Occupancy rate
1	Central America and Caribbean	DOMINICAN REPUBLIC	2 245	2 645	84.9%
2	Central America and Caribbean	GUATEMALA	82	97	84.1%
3	Central America and Caribbean	SAINT-KITTS AND NEVIS	11	13	84.0%
4	North America	CANADA	7 084	8 565	82.7%
5	Indian Sub-Continent	MALDIVES	505	612	82.6%
6	South America	URUGUAY	87	105	82.4%
7	Central America and Caribbean	HONDURAS	17	20	82.2%
8	Central America and Caribbean	TRINIDAD & TOBAGO	99	121	82.1%
9	Far East	SINGAPORE	3 316	4 057	81.7%
10	South America	PERU	338	414	81.7%
11	Central Africa	DEMOCRATIC REPUBLIC OF THE CONGO	39	47	81.5%
12	Central America and Caribbean	CUBA	1 550	1 922	80.6%
13	South America	SURINAM	239	296	80.6%
14	North Africa	TUNISIA	5 245	6 558	80.0%
15	Far East	THAILAND	4 175	5 223	79.9%
16	Central America and Caribbean	COSTA RICA	147	183	79.9%
17	Far East	HONG KONG	3 066	3 849	79.7%
18	South America	ARGENTINA	1 230	1 547	79.5%
19	Southern Africa	SOUTH AFRICA	2 938	3 705	79.3%
20	Southern Africa	MAURITIUS	422	533	79.2%
21	North Africa	EGYPT	8 716	11 058	78.8%
22	Other European countries	TURKEY	19 871	25 517	77.9%
23	West Africa	GAMBIA	204	263	77.5%
24	Far East	JAPAN	3 911	5 051	77.4%
25	Central America and Caribbean	MEXICO	2 343	3 038	77.1%

¹ EU-27 except Bulgaria, France and Greece

Seasonality of extra-EU transport

Graph 4: Monthly share of passenger transport between the EU* and the main extra-EU regions in 2006



* EU-27 except Bulgaria

Graph 4 shows the seasonality of air services between the EU countries and other world regions.

The leisure passenger market influences the summer peak of traffic during July and August. This is most apparent for European countries other than EU where these two months accounted for a quarter of the total annual transport.

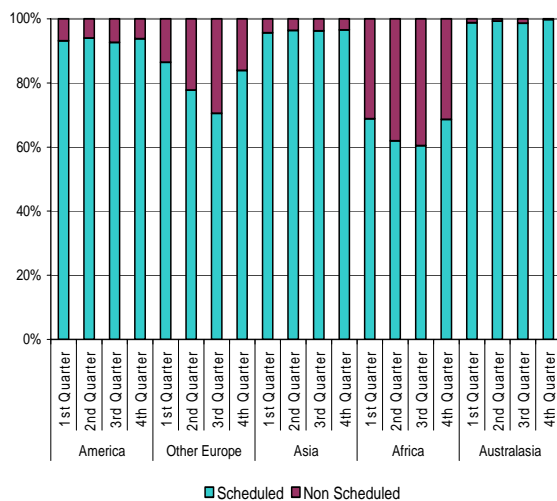
A peak during August is also observed for services to

and from Africa and a slightly smaller peak can be observed for services to/from America.

All regions experience a smaller peak over the Christmas and New Year period. This is most pronounced in the Australasian market.

Transport to/from Asia is more equally spread out over the year, as the traffic with this region is mainly "non-leisure" transport.

Graph 5: Share of the type of flights in the total number of passengers carried by partner region in 2006



Graph 5 indicates the variation existing between the share of the scheduled/non-scheduled passenger transport in the quarterly transport between the EU and each world region. In Europe, low cost scheduled air carriers have taken over a significant part of the traditional charter market. With seat-only tickets being made available on many non-scheduled services the traditional distinctions are becoming blurred.

Non-scheduled services predominantly operated in the Europe except EU-27 and African regions. The large majority are for leisure purposes and are arranged by tour operators.

In the regions Other Europe and Africa, a higher summer peak may be observed for non-scheduled flights, but these services are less seasonal to and from the African region, possibly due to winter sun holidays.

➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

Data sources

All figures presented in this publication have been extracted from the Eurostat aviation database on the 01/04/2008. The database is available online from the Eurostat web page.

Main Definitions

Passengers on board: All passengers on board of the aircraft upon landing at the reporting airport or at taking-off from the reporting airport. This includes direct transit passengers.

Passengers carried: All passengers on a particular flight counted once only and not repeatedly on each individual stage of that flight. This excludes direct transit passengers.

Direct transit passengers: Passengers who, after a short stop, continue their journey on the same aircraft on a flight having the same flight number as the flight on which they arrive.

Indirect transit passengers: Passengers arriving and departing on a different aircraft within 24 hours, or on the same aircraft bearing different flight numbers. They are counted twice: once upon arrival and once upon departure.

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

Occupancy rate: ratio of the number of passengers on board to the number of seats available.

Real origin/destination in case of indirect transit passengers: the data provided do not allow to collect information on the real origin and destination of a passenger in indirect transit. For instance, a passenger departing from London to Sydney with a change of aircraft and flight number in Vienna will only be reported

on the routes London-Vienna and Vienna-Sydney but not on London-Sydney.

Airport coverage

In principle, this publication covers the air transport in the airports of the Reporting Countries with more than 150 000 passengers carried in 2006.

Data availability

Data for the Member States having joined the EU in 2004 or 2007 are available at airport route level in general starting from 2001 to 2007 reference year. As a consequence the geographical coverage of data referring to the period 1997-2006 is not complete at EU-25 level and EU-27 level.

Figures exclude Denmark in 2000 and Greece in 2001 and 2002. Due to missing airport in the declarations from Italy for 2001 and 2002, estimates have been produced to obtain better time series.

Flight Stage data were provided by the following countries:

Belgium (2001), Denmark (from 1997 to 2002), Estonia (from 2001 to 2003), Ireland (2003), Italy (1999 and 2000), Latvia (until 2003), Hungary (2001), Luxembourg (all years), Austria (1999), Sweden (from 1997 to 2001)

World regions and sub-regions

The map below presents the coverage of the world regions and sub-regions. These regions are based on the geonomenclature used by Eurostat for the external trade statistics.

This publication was prepared with the assistance of Mathieu Erzar (data) and Philip Osler (commentary).



Further information

Data: [Eurostat Website: http://ec.europa.eu/eurostat](http://ec.europa.eu/eurostat)

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