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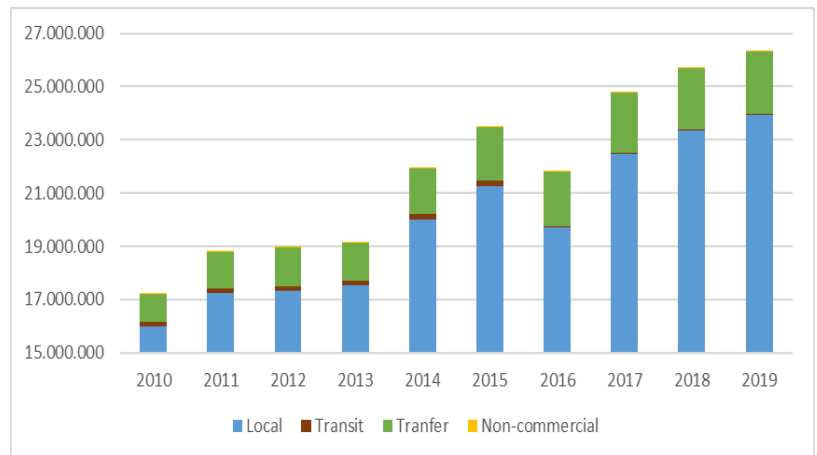
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01 » EVOLUTION OF TRANSPORT IN BRUSSELS AIRPORT

Passengers by type

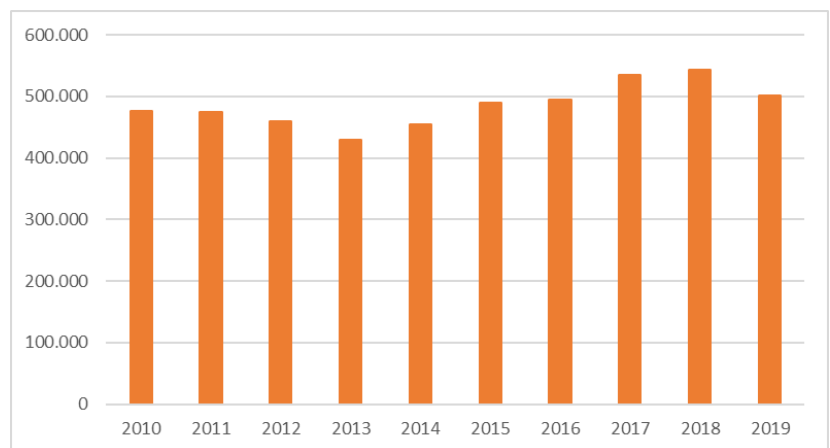
In 2019, approximately **26.4 million passengers** were transported via Brussels Airport. **About 91%** of these passengers were **O&D**, while almost **9%** were **transfer** passengers.

Since **2010**, the number of passengers increased by around **53%**. The proportion of **transfer passengers** in particular rose significantly by **around 127%**. The number of local passengers grew by almost **50%**, while transit passengers decreased by around **59%**.



Tonnes of cargo transported

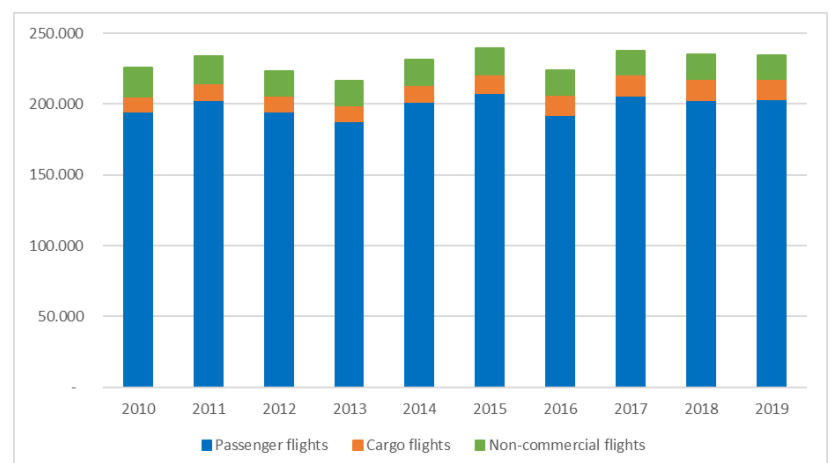
Approximately **500,700 tonnes** of cargo were transported (by air) via Brussels Airport in 2019. This is a decrease of almost **8%** compared to 2018. About **27%** of this cargo was transported through “full freighters”, **41%** through “integrators” and **32%** was “belly cargo”. Full freighters in particular experienced a decline at Brussels Airport.



Number of aircraft movements

The number of aircraft movements decreased by **0.4%** in 2019 compared to 2018 to reach **234,460**.

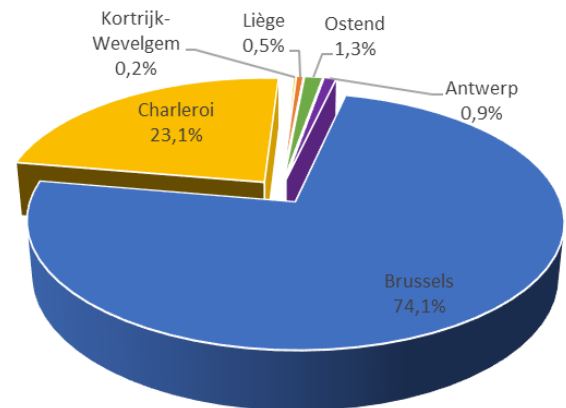
The number of passenger flights - accounting for almost **87%** - in relation to the number of passengers has been on a **downward trend** in recent years. This is partly due to efficiency reasons (increased seat-load factor) and the limited capacity of airports in general.



02 » COMPETITION AIRPORTS - PASSENGERS

Passengers in Belgian airports

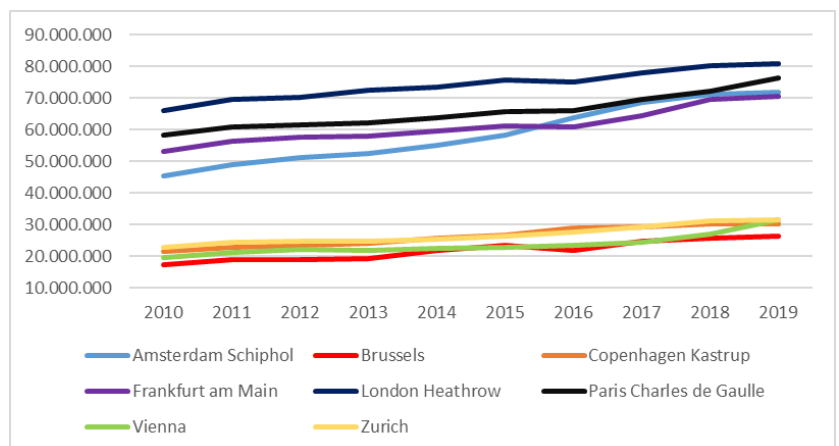
Brussels Airport is by far the largest airport in Belgium for passenger transport (**approx. 74%**). Nevertheless, **Charleroi** (with a market share of **23%**) is a major competitor of Brussels, especially in terms of short-haul tourist flights. Of course, there is competition in the low-cost segment. Nevertheless, low-cost companies have recently been expanding their presence in primary airports.



Evolution of passengers at reference airports

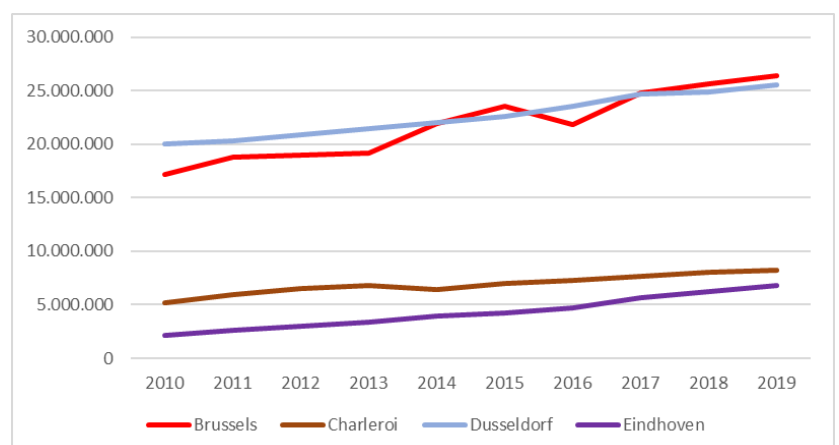
In accordance with the transformation decree of 27 May 2004, Brussels Airport should be compared with reference airports (see figure).

Compared to them, Brussels is still the “**smallest**” airport, especially after Vienna Airport experienced a significant growth for two years in a row.



Evolution of passengers at other competing airports

Of course, it is also useful to compare the performance of Brussels Airport with (other) airports that are (or may be) in direct competition with them (cf. within the *catchment area*). In addition to **Charleroi**, Brussels also faces strong competition from **Eindhoven**, despite the much smaller capacity and lower flight frequency.



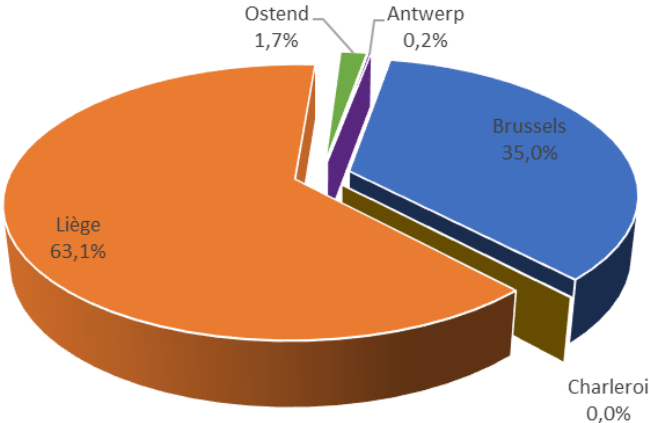
Düsseldorf Airport (200 km from Brussels and with 25.5 million passengers) also is a major competitor. It is an important hub for the two largest airlines: Lufthansa and Air Berlin. Given the takeover of Brussels Airlines by Lufthansa, this could further intensify competition in the future.

02 » COMPETITION BETWEEN AIRPORTS AND BETWEEN AIRLINES

Cargo transported in Belgian airports

With regard to freight transport in Belgium, Liege Airport is the market leader. Brussels has a **share of 35%**. However, Air Cargo Belgium indicates that Brussels and Liege are complementary rather than in competition.

Policy must therefore ensure that Belgium does not lose ground in relation to its neighbouring countries. Such a trend has developed in recent years due to noise standards, among other things.

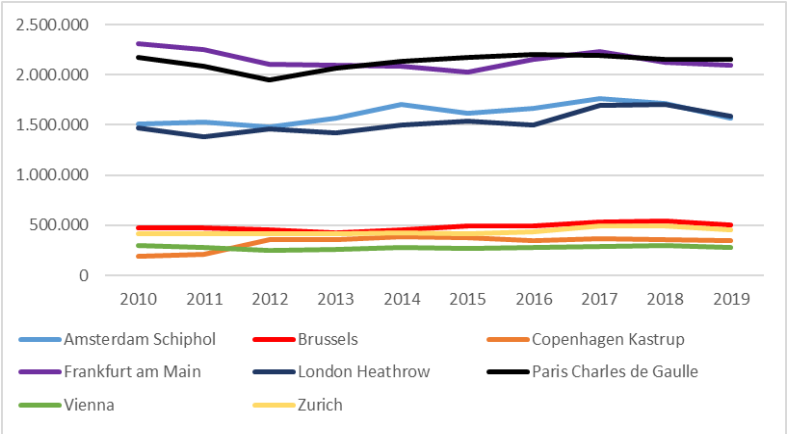


Tonnes of cargo - reference airports

Reference airports show a similar pattern in terms of cargo transport. Brussels is the largest of the “small” reference airports.

Compared to the “big” airports, Brussels has a very high “night rate”.

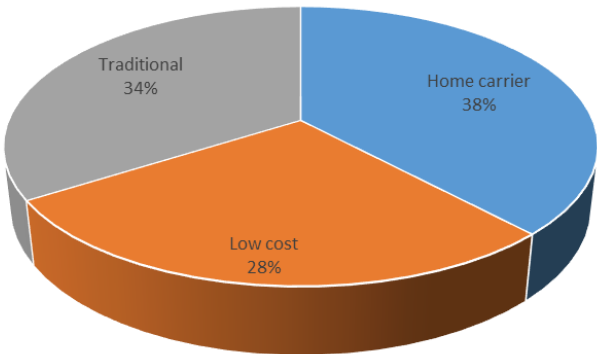
Due to capacity problems, there is a very high interaction between airports, especially as regards cargo.



Market share airlines

The liberalisation and unification of the European aviation market in recent decades has increased competition between airlines. Moreover, low-cost airlines have been able to gain an increasing market share in recent years, including at Brussels airport. Nevertheless, the importance of the home carrier remains crucial.

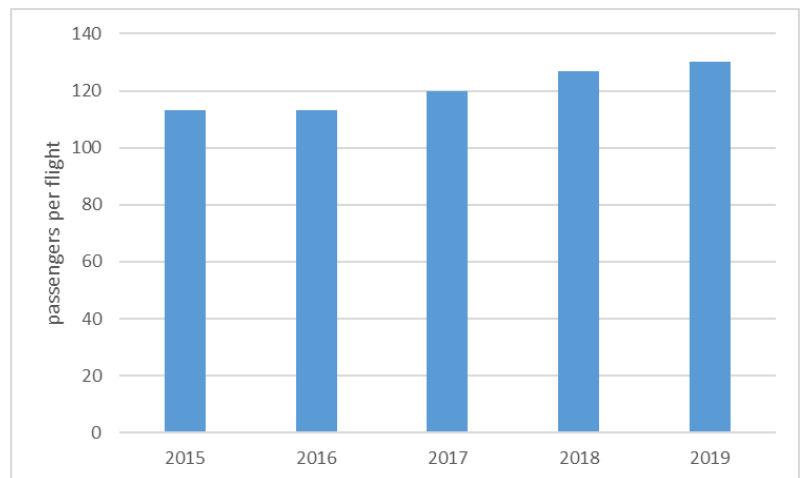
Of course, it is important to note that more and more airlines use hybrid models.



03 » OPERATIONAL FUNCTIONING OF THE AIRPORT

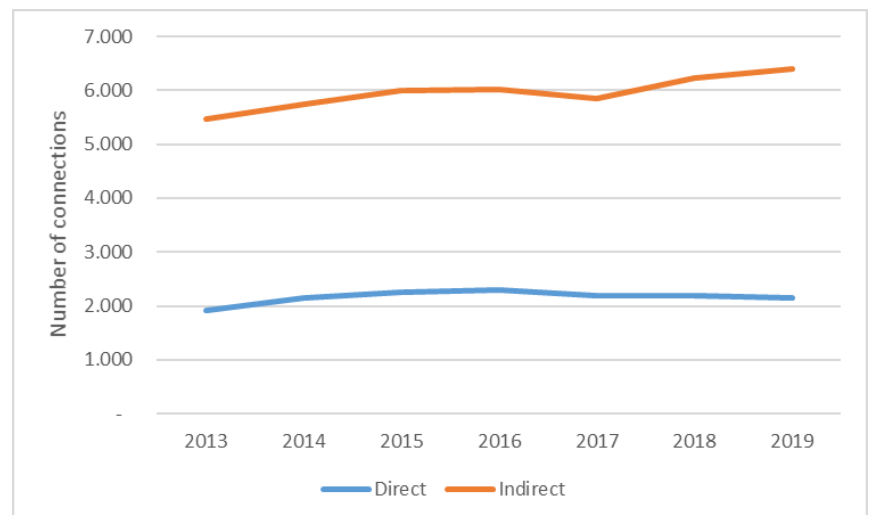
Evolution passengers per flight

As indicated above, the number of aircraft movements declined in 2018 and the number of movements in relation to the number of passengers has decreased in recent years. This is due to **better passenger load factors** on the one hand and to the **use of larger aircraft** on the other hand.



Connectivity Brussels Airport

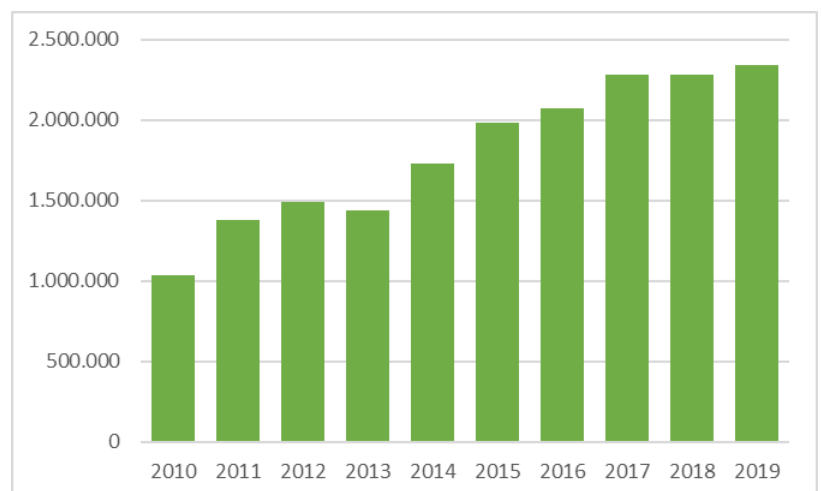
The connectivity of Brussels Airport has improved significantly in recent years. **Direct connectivity** - i.e. the number of direct connections, including frequencies – has increased by almost **12%** since 2013. **Indirect connectivity** - i.e. destinations via connecting flights (via hub airports) – has increased by **approximately 16.8%** compared to 2013.



Evolution of transfer passengers

In recent years, Brussels Airport has experienced a remarkable growth as regards the number of transfer passengers (**+127% compared to 2010**) and therefore plays an increasingly important role as an international hub.

Given the integration of Brussels Airlines within Lufthansa, Brussels will (possibly) become one of the most important hubs for the German group.



04 » QUALITY AT BRUSSELS AIRPORT

Satisfaction indicators

The airport conducts satisfaction surveys using the internationally recognised ASQ (Airport Survey Quality) methodology. In addition, passenger satisfaction is measured via benchmarking.

Brussels Airport has a good general level of satisfaction, which is also on the rise.



Below are the top 3 of the best and worst scoring satisfaction indicators for 2018.

Top 3 - best scores (compared to target)	target	2018
Walking distances inside the terminal	73,9	85,6
Comfort of waiting areas/gate areas	86,9	91,4
Ease of navigating through the airport	91,1	95,6

Top 3 - worst scores (compared to target)	target	2018
Waiting time in check-in queue/line - desk	91,9	90,2
Waiting time in check-in queue/line - self-service kiosk	94,1	94,1
Availability of washrooms/toilets	91,9	92,4

Objective availability indicators

Brussels Airport uses a series of objective indicators that measure the availability of its facilities and some services. Below are the top 3 of the best and worst scoring indicators. Brussels Airport always draws up action plans to improve the poorly scoring indicators concerned.

Top 3 - best scores (compared to target)	target	2018
In system time for originating baggage	< 0,25%	0,10%
transfer baggage	< 0,75%	0,14%
Lost property at screening	< 71%	64,46%
Marshaller on time performance	90%	98,21%

Top 3 - worst scores (compared to target)	target	2018
Measurement of waiting time at fast lane security control	95,0%	64,0%
Customer availability of 400 Hz units	98,0%	92,2%
Customer availability of preconditioned air	98,0%	93,5%

04 » QUALITY AT BRUSSELS AIRPORT

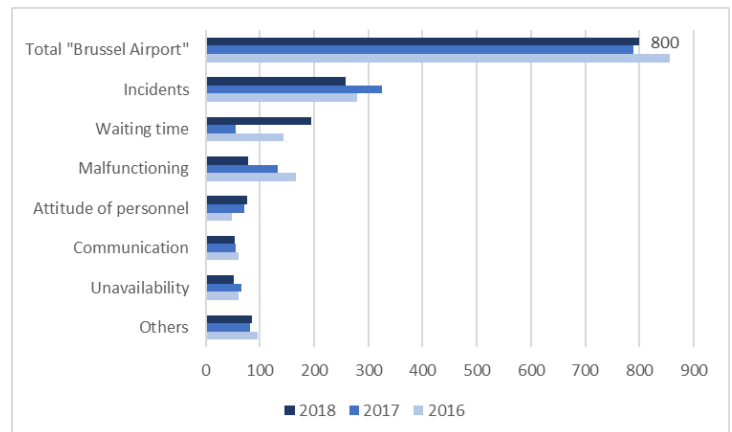
Complaint handling

In 2018, Brussels Airport received 1,656 complaints, i.e. an increase of 8% compared to 2017. This is due to more passengers, but also to e.g. increased waiting times and weather conditions.

Complaints are divided into 2 categories: complaints under the responsibility of Brussels Airport itself and complaints under the responsibility of third parties (concessionaires, airlines, handling agents, etc.).

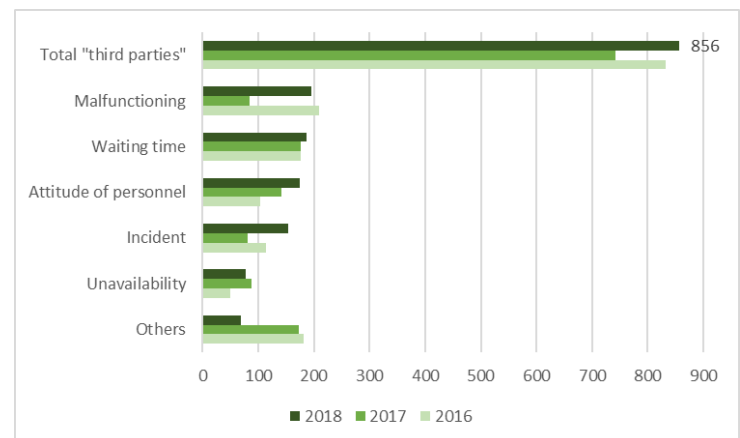
Complaints under the responsibility of Brussels Airport itself increased by 2% in 2018.

Most complaints are (still) related to incidents, in particular lost or damaged luggage or property. In addition, the waiting time, particularly at *security checks*, increased sharply in 2018. The top 3 is completed by defects, especially on the website/mobile app and less on infrastructure.



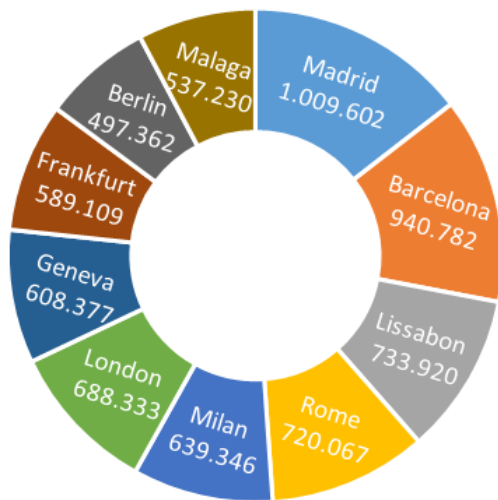
Complaints under the responsibility of third parties increased by 15% in 2018.

Complaints about defects doubled. This includes defects concerning parking ticket machines, websites, or baggage lockers. Complaints about waiting times (at customs, due to flight delays or e.g. at baggage conveyors) come second. Finally, the staff attitude (customs, airline, and police staff, among others) is also often seen as a stumbling block.



05 » TRENDS AT BRUSSELS AIRPORT

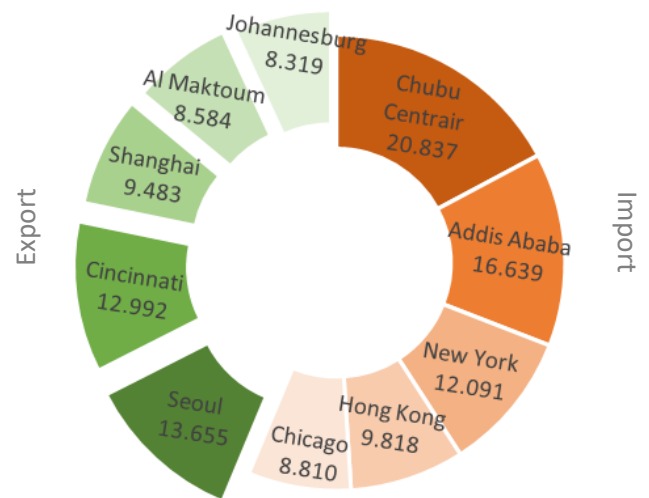
Top 10 destinations passengers



Spain, Italy, and Portugal have been top destinations in terms of passenger numbers for several years and continue to grow. Barcelona, together with Lisbon, has a growth rate of >80% compared to 2013, and Madrid - together with Rome - has a growth rate of >50%.

Outside Europe, New York (with approximately 473,000 passengers) is the most popular destination, followed by Dubai and Tel Aviv.

Top destinations cargo import/export



The cargo department of Brussels Airport has strongly developed in recent years. More than 700,000 tonnes were transported in 2007. Afterwards, there was a decline, with a low point in 2013. Since then, there has been a slight growth again to reach > 500,000 tons today.

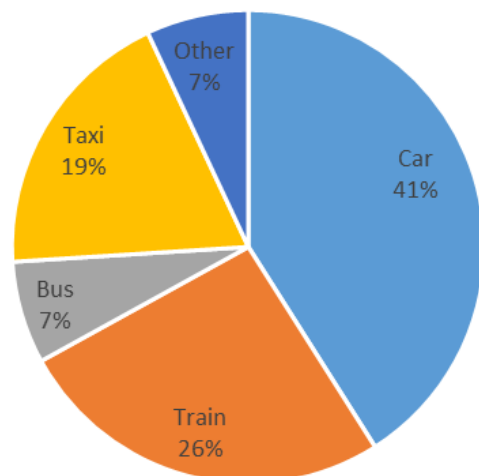
A similar evolution can be observed in terms of origin/destination.

In 2018, most cargo was imported from Chubu Centrair (Japan). Seoul (South Korea) was the top export destination.

Transport from and to the airport

Brussels Airport is fully committed to sustainability and also wants to improve the modal split in this regard. In doing so, it aims to improve the relationship between private and public transport.

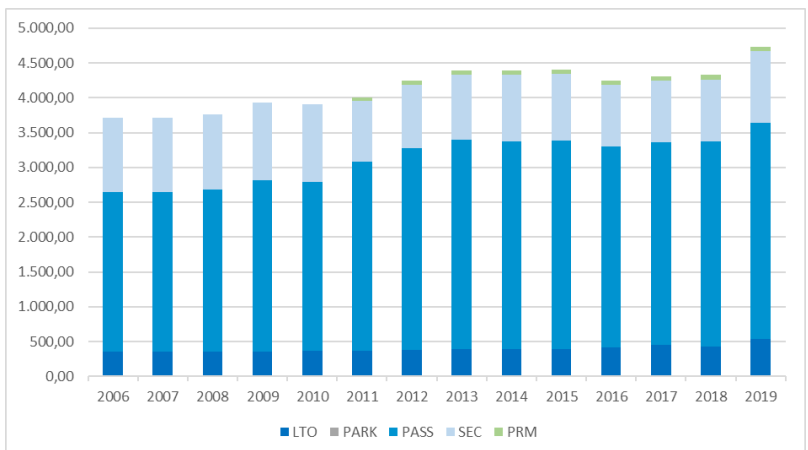
Currently, **almost half** of the passengers come with their **own car**. Only **33%** come by **public transport**. By 2040, Brussels Airport wants to increase this share to 50%.



06 » CHARGES BRUSSELS AIRPORT COMPANY

Evolution charges at Brussels Airport

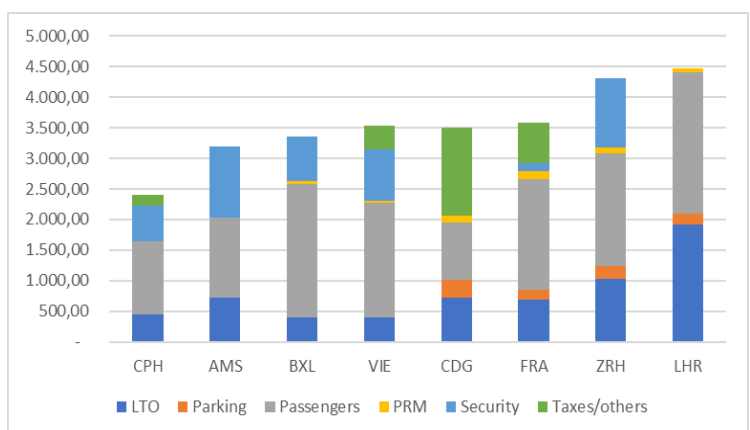
The figure shows the evolution of the same passenger flight over the past regulated periods. Within a regulated period, charges are normally fixed and depend only on indexations and factors. However, in exceptional circumstances, such as after the 2016 attacks and other imposed safety and security measures, charges may be adjusted. The impact of such adjustment can be seen in 2019, when charges were adjusted accordingly.



Partly because of the limited period during which costs could be recovered, there was a relatively significant increase in charges in 2019.

Evolution of charges at reference airports

Of course, it is not easy to compare airports with each other, because of the very different charge structures and incentive programs. Depending on different factors (hour, parking time, etc.), the situation can be different. The figure shows the example of a A319 passenger flight with 100 passengers. Brussels applies **average charges**, with a relatively **high proportion** of regulated charges going to **passenger charges**, while “LTO charges” are relatively low.



Shareholders BAC

In 2019 Macquarie – that owns 48% of BAISA and as a consequence has an indirect control over BAC – wanted to sell its shares. In accordance with the legal provisions, BAC requested the renewal of its operating license in May 2019, after which the Regulatory Service issued a favorable opinion to the Minister of Mobility. In November 2019, the Regulatory Service also confirmed by a decision the renewal of BAC's operating license, after which Macquarie was able to sell its shares to Solace.

