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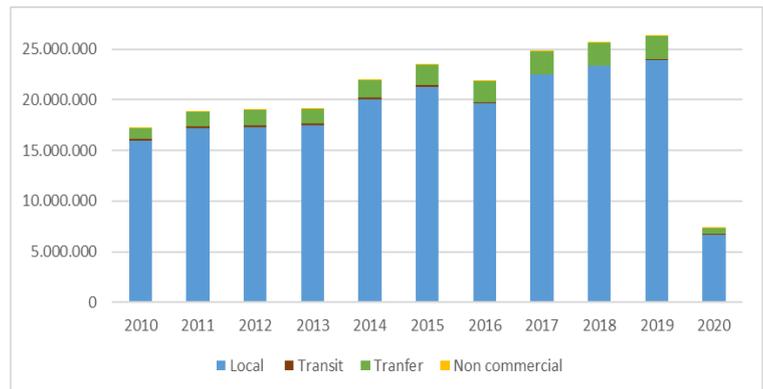


## 01 » TRANSPORT EVOLUTION AT BRUSSELS AIRPORT

### Passengers by type

In 2020, **6.7 million** passengers used Brussels Airport. Transfer passengers accounted for 8.5% of passengers, while the percentage of transit passengers was 0.4%.

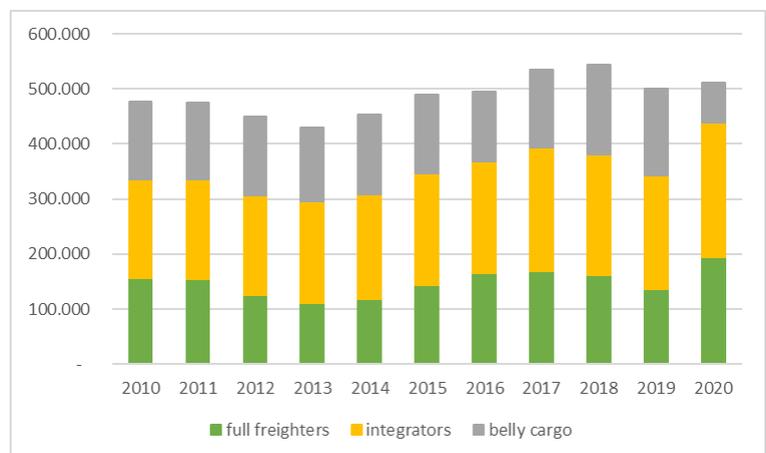
Airport passenger traffic **decreased by 74.4%** compared to 2019. This drop is obviously due to the COVID-19 crisis.



### Freight volume at Brussels Airport

**511,611 tons** of goods were transported from Brussels Airport in 2020, i.e. an increase of 2.1% compared to 2019.

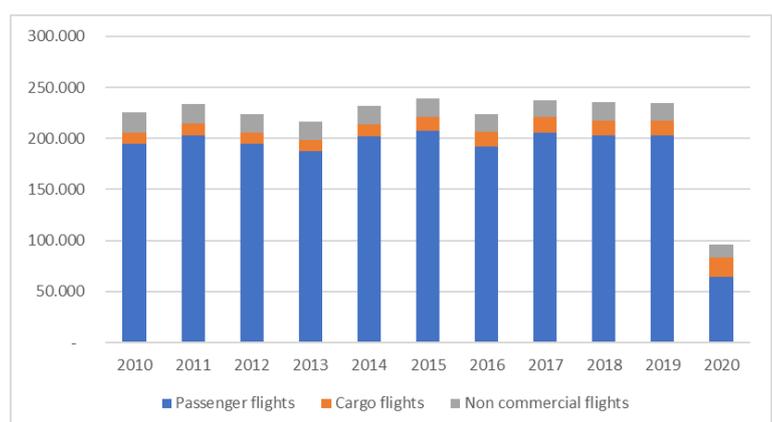
Around 38% of this freight was carried in *full freighters*, i.e. an increase of almost 43% compared to 2019. Of this volume, 48% was *integrator cargo* (also up 18.3%) and 14% was *belly cargo* (freight carried in passenger aircraft), which, due to COVID, is down by almost 54% compared to 2019.



### Number of air movements

The number of air movements in 2020 was **95,813**, a **drop of 59.3%** compared to 2019.

The number of **passenger** flights was down from 201,149 in 2019 to 64,557. The occupancy rate **fell by 26%** compared to the previous year as the decrease in passenger numbers was even higher than that in flights.

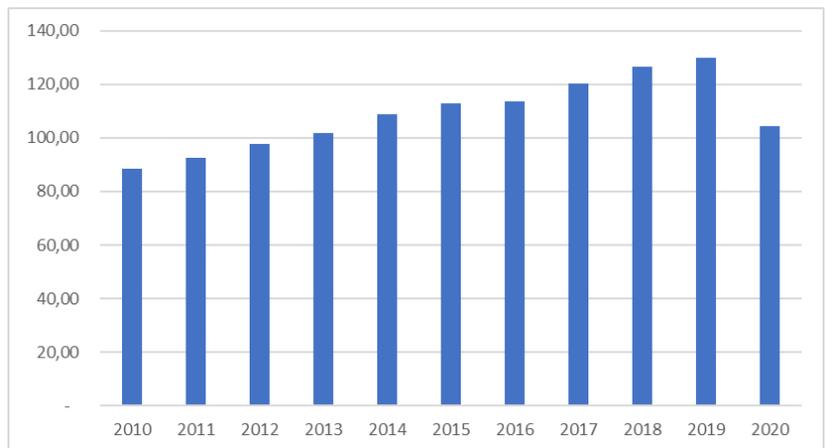


The number of **freight** movements is **up** by almost **30%**. The slight increase in tonnage carried combined with the sharp rise in freight movements led to a rise in the average cost of volumes transported (due in particular to the rise in LTO costs).

## 02 » PASSENGER TRANSPORT AT BRUSSELS AIRPORT

### Number of passengers per flight

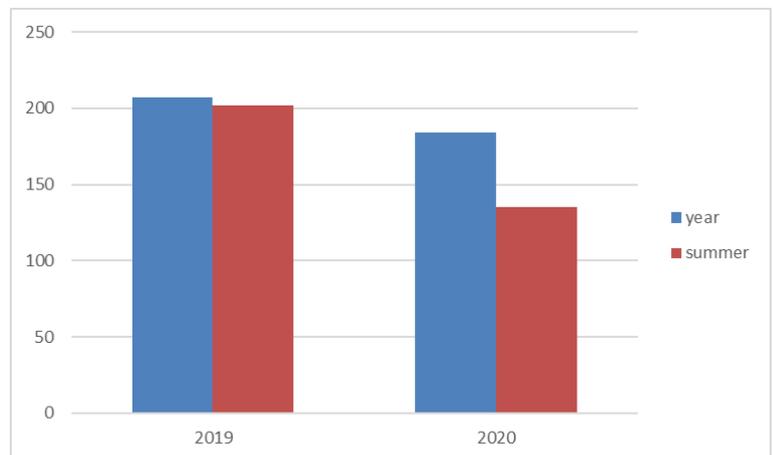
As the airport experienced a sharp drop in traffic - due, among others, to travel restrictions - while the number of flights did not decrease to such an extent - the number of passengers per flight also decreased in 2020, from over 120 to **104 passengers**.



### Connectivity of Brussels Airport

In 2020, the direct connectivity of Brussels Airport dropped by about 80%. Indirect connectivity registered an even higher decline to 90% and almost 98% between April and June 2020.

The number of **destinations** also **fell** from 207 **to** just **180**. During the summer months, the number of destinations even decreased by about 30%.



### Top 10 destinations

Spain is clearly, and by far, the most popular destination, followed as last year by Italy and Portugal. This is all the more remarkable as the Covid crisis in these countries was particularly acute in 2020. Despite the crisis, the favourite destinations remained stable compared to previous years.

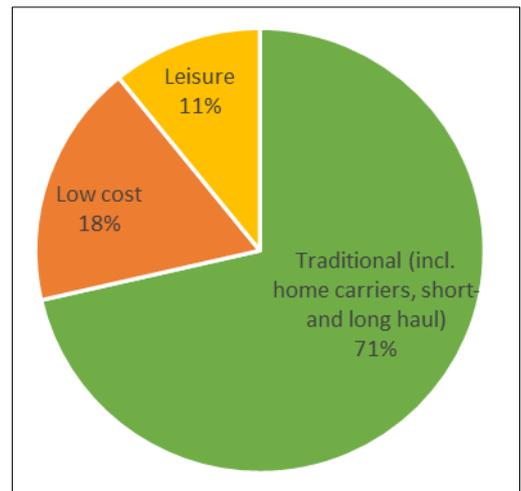
Outside Europe, New York is the most popular destination, followed by Washington and Dubai. The United States thus remains the favourite intercontinental destination.



## 02 » PASSENGER TRANSPORT AT BRUSSELS AIRPORT

### Airline market shares

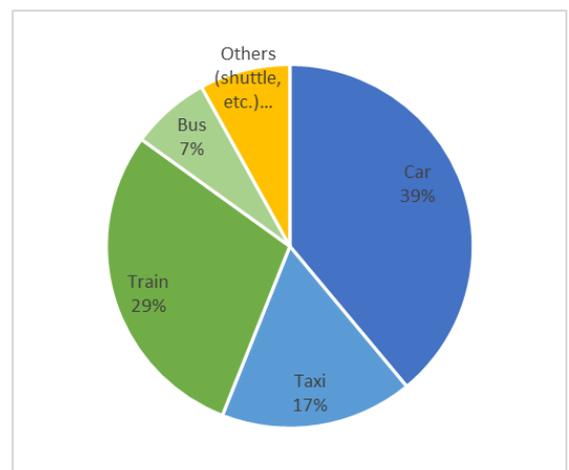
The liberalisation of transport continued with the development of *low-cost* airlines. Traditional or local airlines still have, by far, the largest market share. *Low-cost* airlines slightly increased their market share to 18% (based on Brussels Airport figures and the list of airlines that Brussels Airport considers as *low cost*). The distinction between categories may seem blurred, as the differences are not always clearly manifested in their commercial offers. Indeed, some *leisure* airlines sometimes behave like *low-cost* airlines for some of their flights. In addition, some traditional airlines also offer *low-cost* flights.



### Accessibility of Brussels Airport

Brussels Airport states its wish to contribute to sustainable development and to improve the modal split.

Currently, **56%** of those coming to or leaving the airport use a **car** (private car or taxi), which is fairly stable compared to 2019. 36% of passengers use public transport, which is fairly stable compared to 2019. Of these 36%, **29%** use the **train**.

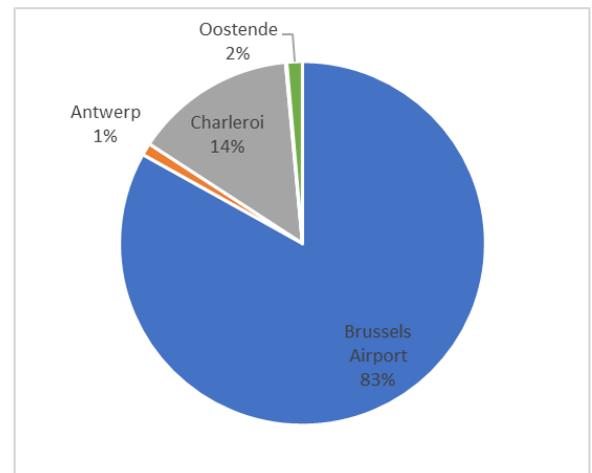


## 03 » COMPETITION BETWEEN PASSENGER AIRPORTS

### Passengers at Belgian airports

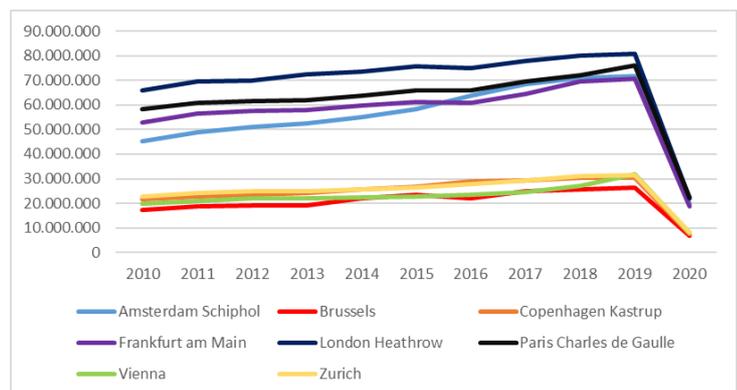
**Brussels Airport** is used by **83%** of all passengers in Belgium. Charleroi Airport remains an important competitor, especially for *low cost* and short distance flights (14%). The other airports in the country (Antwerp, Liege and Ostend) have a negligible market share.

Charleroi Airport registered a greater drop in passenger numbers than Brussels Airport in 2020 (-86% compared to -74% for Brussels), perhaps due to the significant difference in the destinations served by the airlines operating out of these airports. In any case, there are many factors that have affected the responsiveness of airlines to the crisis.



### Passengers at reference airports

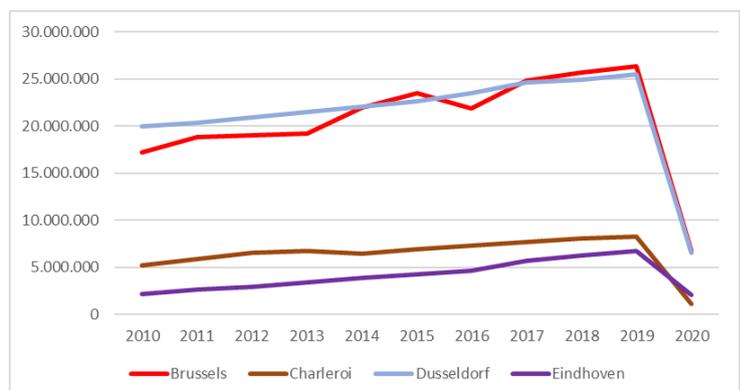
It is important to note that all of these airports experienced a fairly **similar decline of around 73%** (compared to 2019). The size and profile of the airport and the country of the airport do not seem to influence the extent of the fall in passenger traffic.



### Passengers in the catchment area airports

It is also interesting to compare the performance of Brussels Airport with airports that are relatively close and/or have a similar profile (*catchment area*). In addition to Charleroi, Brussels faces competition from Eindhoven. Eindhoven Airport registered a smaller drop than Brussels (69%).

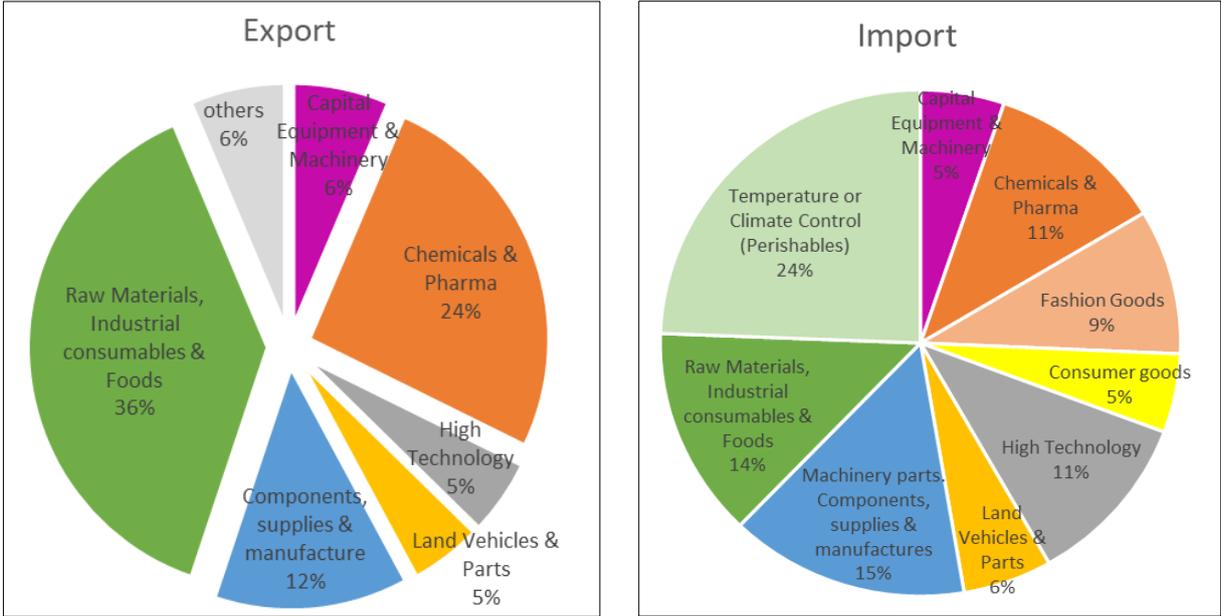
Moreover, Düsseldorf's performance is comparable to that of Brussels. Düsseldorf is a hub for Lufthansa and Air Berlin and a significant competitor.



# 04 » FREIGHT TRANSPORT AT BRUSSELS AIRPORT

## Freight types

The type of goods transported from Brussels Airport probably contributed to the slight growth in volumes from Brussels Airport despite the crisis, in contrast to the reference airports. The following two graphs show the distribution of freight by product type for exports and imports. It can be seen that construction products, raw materials, and pharmaceuticals have a significant share of exports. As regards imports, the largest shares are for perishable goods, industrial machinery components, and construction materials.



## Top 10 destinations (import/export)

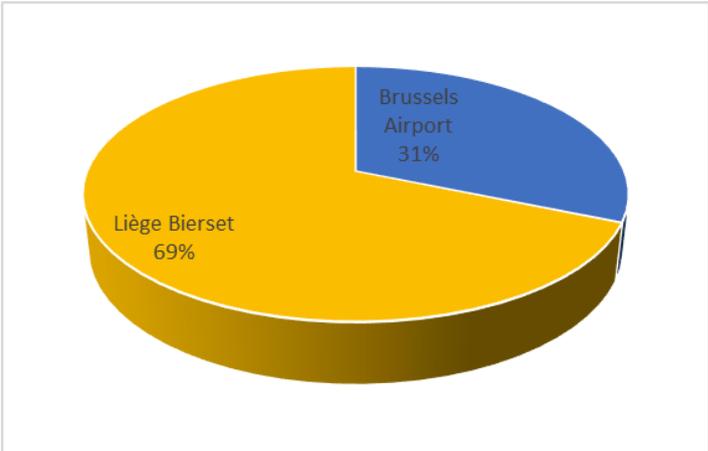
Brussels Airport’s freight division continued to grow despite the Covid crisis. Addis Ababa, Cincinnati, and Doha are the destinations that generate the most freight volume. It can be seen that the first “European destination” (Istanbul) is ranked ninth, and the second is Leipzig (13th place).



# 05 » COMPETITION BETWEEN FREIGHT AIRPORTS

## Goods transport at Belgian airports

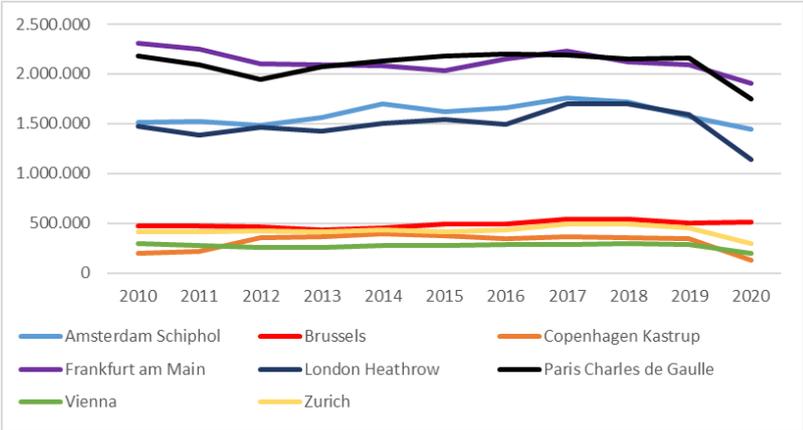
In terms of freight transported, Liege Airport consolidated its leadership in 2020 with a market share of almost 69%. **Brussels Airport** has a share of almost **31%**, down from 2019. Liege experienced a stronger increase than Brussels (**24% vs. 2%**).



## Freight volume at reference airports

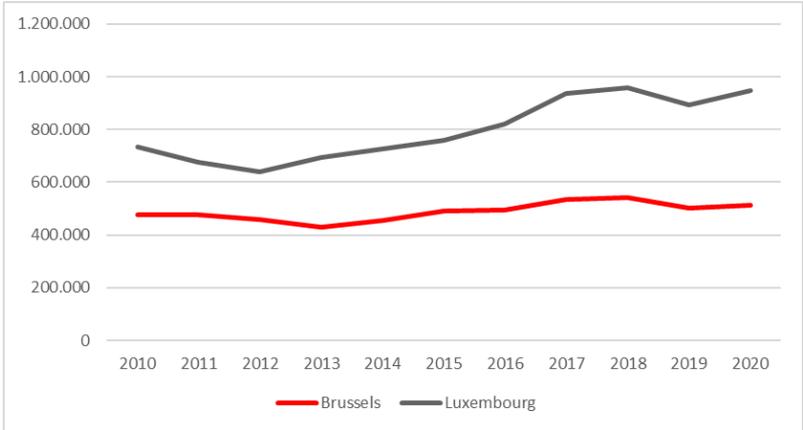
**Brussels Airport** stands out from the reference airports as the **only one** to see its **freight volume increase** compared to 2019. It is interesting to note that the demand for the transport of pharmaceuticals and e-commerce products rose. This probably explains the increase.

In general, the freight volume at reference airports fell (by up to more than 30% for Copenhagen and Vienna and by more than 22% for London Heathrow).



## Other competitors of Brussels Airport

Among the reference airports, Paris Charles de Gaulle, Amsterdam Schiphol, and especially Frankfurt are the most serious competitors due to their geographical proximity, but also the types of goods, such as pharmaceuticals. Brussels Airport also faces competition from **Luxembourg Airport**. In 2020, this airport carried **947,400 tonnes** of freight, an increase of 6%.



## 06 » QUALITY WITHIN BRUSSELS AIRPORT

### Satisfaction indicators

The airport conducts its satisfaction survey using an internationally recognised methodology, namely the Airport Survey Quality.

With **97.6%** in 2019, Brussels Airport's satisfaction indicator is comparable to that of 2018, which stood at 97.8%.



As shown in the tables below, there is also **stability** in the best and worst satisfaction scores compared to 2018.

Top 3 - best scores (relative to target)	target	2019	2018
Walking distances inside the terminal	73,9	87,3	85,6
Clarity of the Brussels Airport Website	80	86,2	89
Ease of making connections with other flights	86,4	92	90,5

Top 3 - worst scores (relative to target)	target	2019	2018
Cleanliness of washrooms/toilets	84,3	84,2	85
Waiting time in check-in queue/line - self-service kiosk	94,1	94,8	94,1
Cleanliness of airport terminal	95,8	96,9	97,3

### Availability indicators

Brussels Airport developed a series of indicators relating to the availability of facilities and certain services. The three best and three worst results are shown below. In general, there is stability in the good scores for the luggage system and the *marshaller*. There is also stability in the poor scores (air conditioning, and 400hz availability) compared to 2018. The indicators concerned are the same both for the best results and for the worst results. Brussels Airport drew up an action plan to improve its poor performance in terms of availability and services.

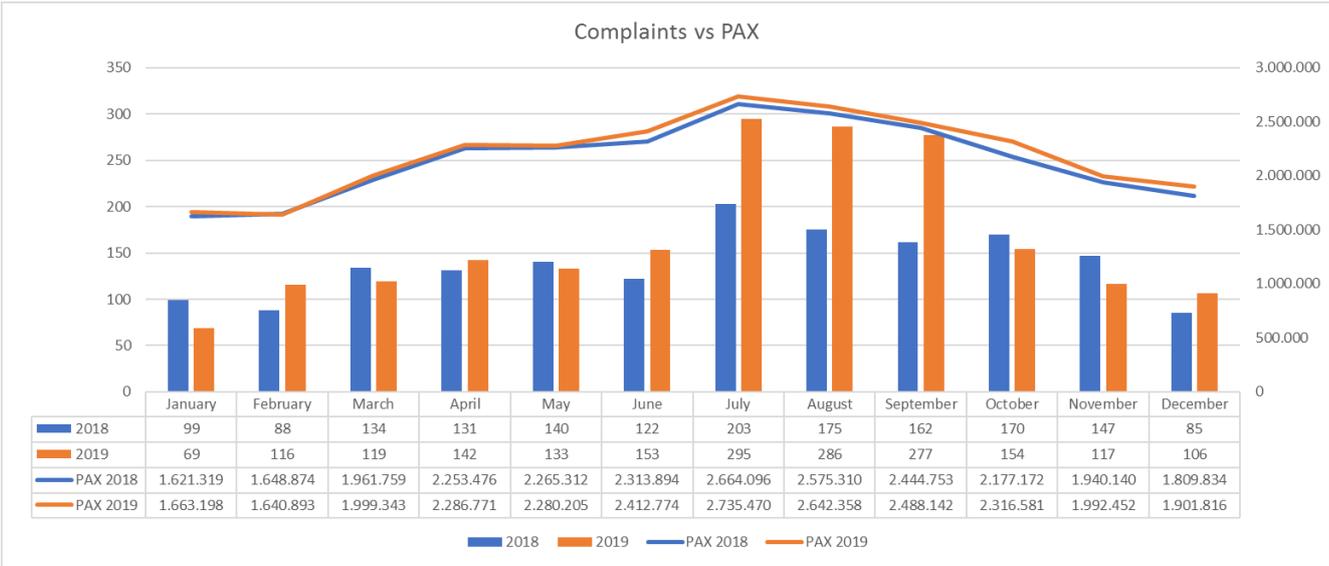
Top 3 best scores	Target BAC	2019	2018
System originating baggage	<0,25	0,1	0,1
transfer baggage	<0,75	0,15	0,14
Marshaller on time performance	90%	98,5%	98,2%
Runway conformity	95%	100%	99,8%

Top 3 worst scores	Target BAC	2019	2018
Availability pre conditioned air	98%	85,76%	93,52%
Customer availability 400hz	98%	90,38%	92,24%
Dwelling time at check-in	70%	65,76%	64,29%

# 06 » QUALITY WITHIN BRUSSELS AIRPORT

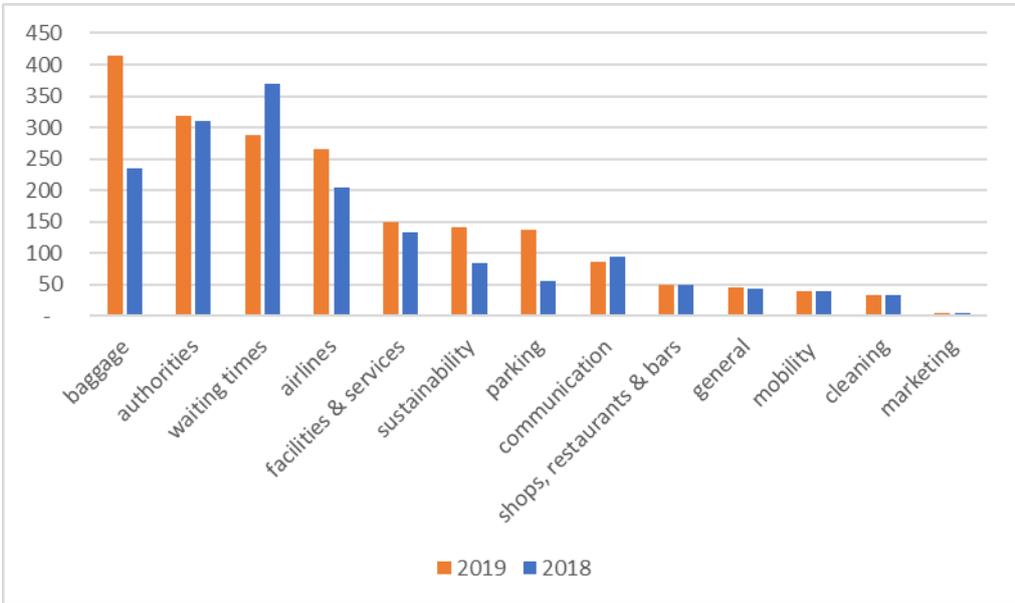
## Complaint handling

Brussels Airport’s complaint handling system reports **1,967 complaints** in 2019. This is an **increase of 19%** compared to 2018. This increase is attributed to a series of events such as bad weather, luggage sorting incidents, or problems with border control during the summer. Complaints directly attributable to Brussels Airport would represent 54% of the total complaints. 46% of the complaints are said to be caused by third parties.



Complaints addressed directly to Brussels Airport increased significantly (+32%) in 2019. Those related to third parties increased by almost 6%.

The graph shows an increase in complaints about luggage, which almost doubled in number, and to a lesser extent, complaints about parking. Complaints about authorities are still ranked second. In the other categories, as the graph shows, the level of complaints is relatively stable.



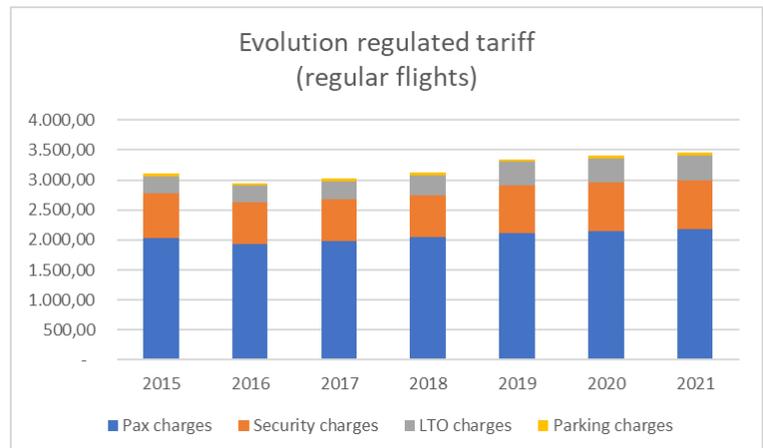
## 07 » AIRPORT CHARGES

### Regulated tariffs at Brussels Airport

The graph opposite gives an overview of the evolution of tariffs in recent years. During a regulated period, tariffs evolve according to a tariff formula that includes indexation and a specific coefficient.

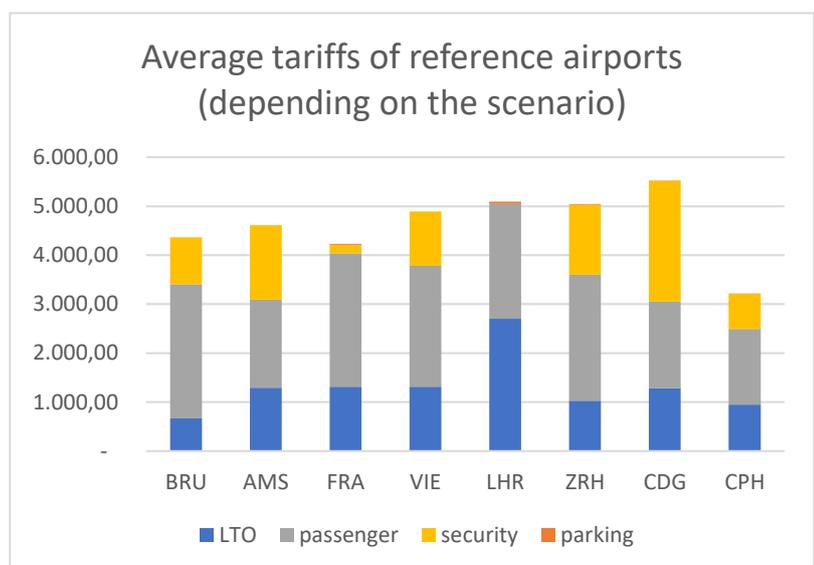
In 2020, the increase was very small and resulted from indexation. Following the Covid crisis, the regulator produced an opinion proposing to extend the regulation period from 2021 to 2023 and not to apply the specific coefficient in 2020, exceptionally.

The legislator decided to follow this opinion.



### Tariffs of reference airports

There is a great disparity among the reference airports compared to Brussels Airport. This disparity can be seen both in the level of charges and in the structure of the charges, where there is no homogeneity and the tariff models are very different. For example, the security component is much higher in Paris than in Brussels or London and particularly low in Frankfurt. In addition, the proportion of LTO charges is lower at Brussels than at other airports.



### Summary table of charges

The table below provides a summary of the charges per passenger since 2016. Overall, there has been a slight increase since 2016 in originating, transfer, and parking charges. This evolution is notably due to the indexation and a specific coefficient. It is also worth noting that the charges for bussing have doubled since 2016 (a new service provider was chosen with higher prices corresponding to a better quality of service). Security-related per-passenger charges increased in 2019. This increase is clearly the result of the measures taken to strengthen security after the attacks in 2016.

The LTO charges also increased significantly in 2019 (as a result of the new security measures which are also reflected in the LTO charges).

April	2015	2016	2017	2018	2019	2020	2021
<b>Pax charges</b>							
Originating	21,08	19,76	20,22	20,71	21,29	21,55	21,74
Transfer	10,81	10,14	10,37	10,64	10,93	11,07	11,17
Transit	0	0	0	0	0	0	0
Bussing	0	0,27	0,3	0,46	0,53	0,61	0,62
PRM	0,43	0,43	0,47	0,47	0,47	0,53	0,69
<b>Security charges</b>							
Originating	6,73	6,19	6,22	6,25	7,26	7,23	7,29
Transfer	6,73	6,19	6,22	6,25	7,26	7,23	7,29
Transit	6,73	6,19	6,22	6,25	7,26	7,23	7,29
<b>LTO charges</b>							
Unit fee pax	2,33	2,33	2,53	2,76	3,16	3,38	3,41
unit fee cargo	2,33	2,21	2,29	2,37	2,63	2,69	2,72
unit fee helicopters	15,08	14,3	14,81	15,36	16,91	17,33	17,49
<b>Parking charges</b>							
Pax	0,7	0,67	0,7	0,72	0,75	0,77	0,78
Cargo	0,2	0,19	0,2	0,2	0,21	0,22	0,22

This evolution is shown in the three graphs below.

