

## Market Monitoring Brussels Airport

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02 » BRUSSELS AIRPORT PASSENGER TRANSPORT – KPI'S & TRENDS

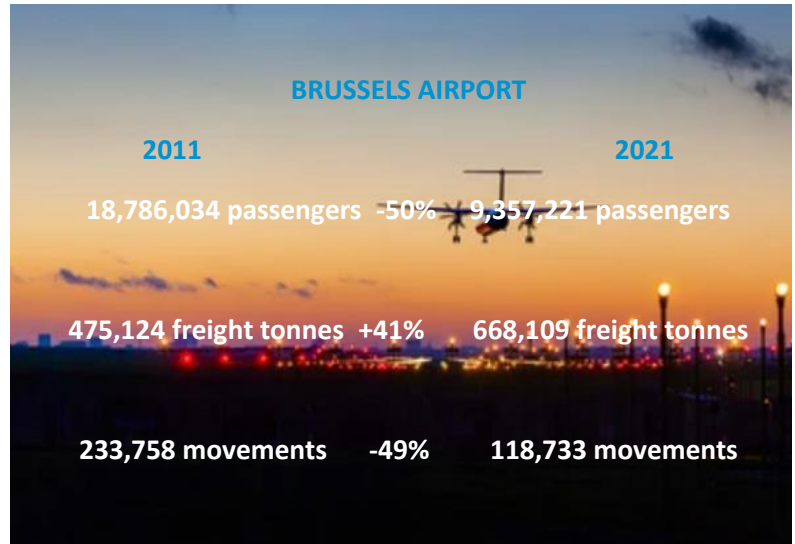
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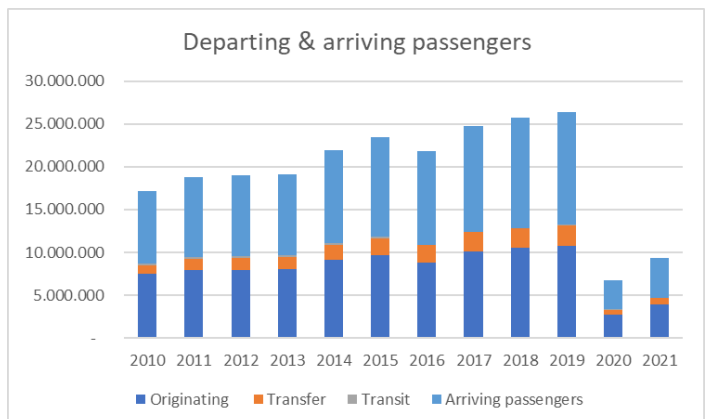


## 01 » EVOLUTION OF TRANSPORT AT BRUSSELS AIRPORT

### Passengers by type

In 2021, the number of passengers was **9,357,221**. This represents a **39%** increase over 2020 **but was still down 65% from 2019**.

This turnaround from 2020 is due to a slight improvement in the sanitary situation and therefore a decrease in travel restrictions. We can see that recovery remained timid and continued in 2022, based on the first eight months of the year, which were significantly higher than in 2021.



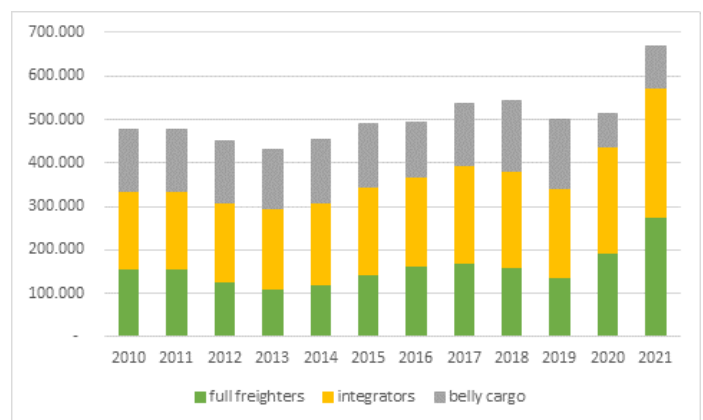
In 2021, 16% of departing passengers were in transit and 0.4% in transfer (half of 2020).

### Freight by type of carrier

The freight business continued to grow. In 2021, **668,109 tons** were transported to and from Brussels Airport. This represents a **31% increase** over 2020 and 33% compared with 2019.

In the face of the pandemic crisis, this growth seemed to show strong resilience by Brussels Airport in all segments.

41% of the volume was by *full freighters*, 44% by *integrators* and 15% via *belly cargo*, which was relatively stable compared to 2020.

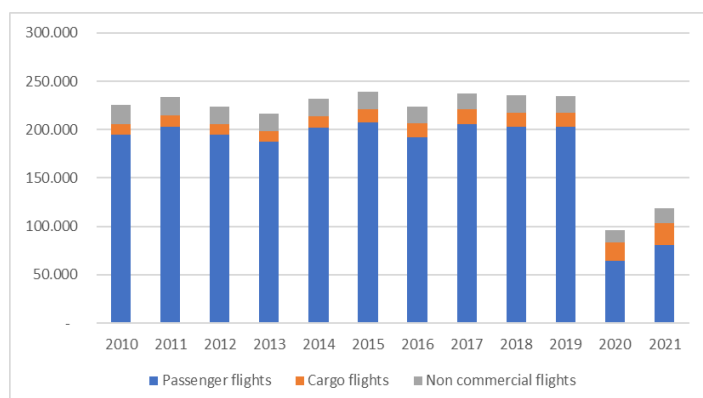


### The number of flight movements

In 2021 there were **118,733 flight movements at Brussels Airport**. This figure was up by **24%** compared to the previous year. However, it is still down 49% from 2019.

The number of passenger movements was 81,038 (up 26% from 2020 but still down 60% from 2019).

The number of cargo movements was 22,601 (+20% compared to 2020 and +54% compared to 2019).



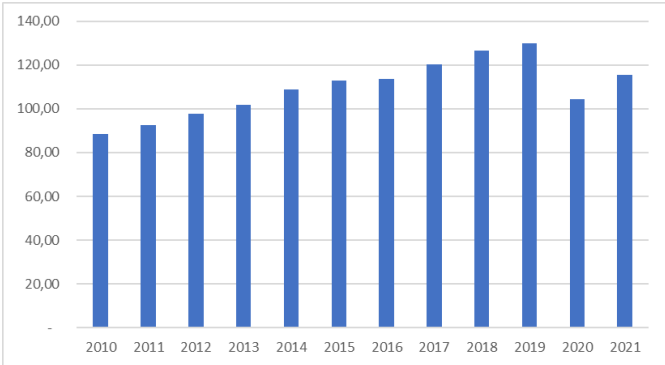
The increase in flight movements was less pronounced than the increase in passengers or freight volume. Although other causes are possible, this shows that airlines improved their occupancy rates.

## 02 » BRUSSELS AIRPORT PASSENGER TRANSPORT – KPI’s & trends

### Number of passengers per flight

The average number of passengers per flight was 115.47, up 11% from 2020 but still down 11% from 2019.

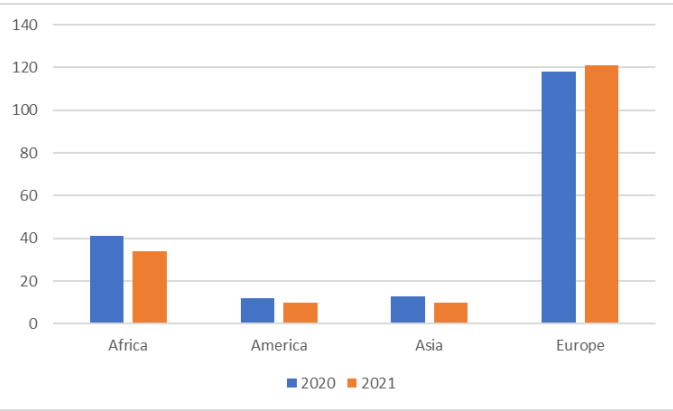
In 2021, occupancy rates remained low early in the year (sanitary restrictions) and recovered to some extent in late spring.



### The number of destinations

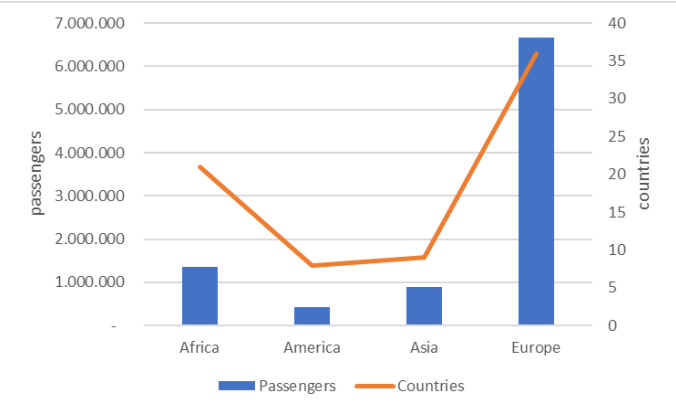
Brussels Airport served 175 destinations in 2021. This was quite similar to 2020.

However, there was a decline in destinations to all the non-European continents and a slight increase in destinations in Europe (Italy, Portugal, Turkey).



### Passengers by continent

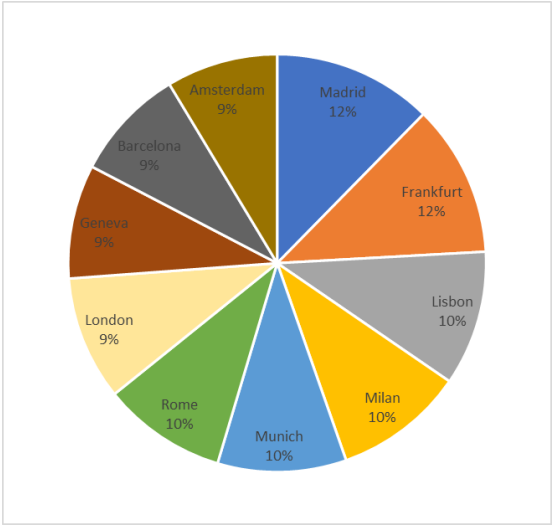
In terms of final destination, passengers travelling to Europe represented more than two thirds of those using Brussels Airport. There was a significant number of passengers with destinations in Africa (1.3 million passengers). Just under 900,000 headed for Asia and just over 300,000 for the Americas.



## 02 » BRUSSELS AIRPORT PASSENGER TRANSPORT - KPIs & trends

### Top 10 destinations

There was no significant change in the most popular destinations compared to 2020. The top three most popular destinations remained unchanged from 2020. There were some minor changes in the subsequent places.

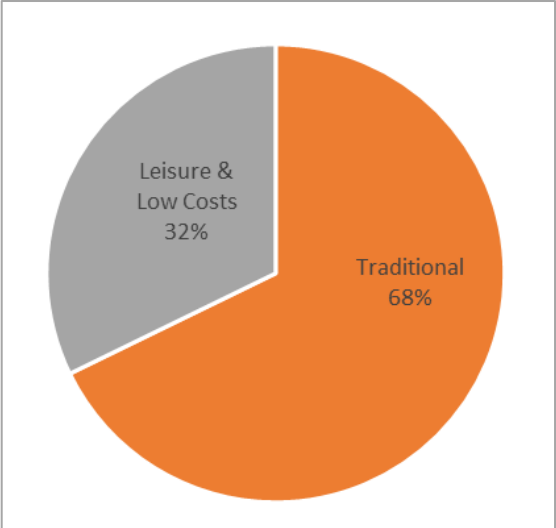


### Market shares by type of airline.

The traditional airlines (other than *low-cost* and *leisure*) represented 68% of the market.

These traditional companies saw their market share fall by 3% compared to 2020. *Low cost* and *leisure airlines* (cf. *charter flights*) had a significant market share of nearly one third.

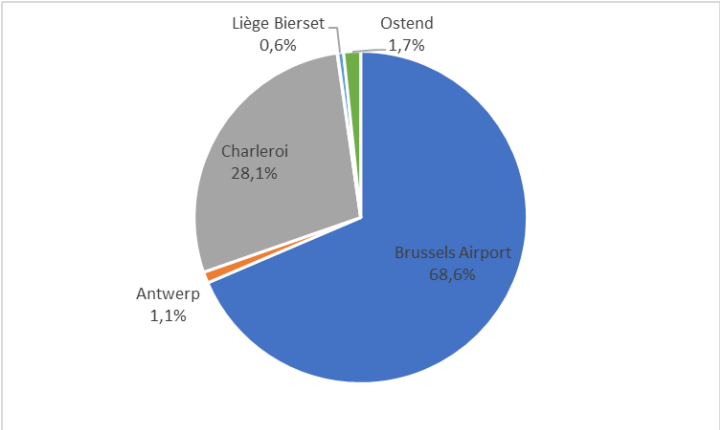
Compared to last year, *low-cost* and *leisure* airlines (Ryanair, Easy jet, TUI, etc.) slightly increased their market share from 29 to 32%. They benefited slightly better from the recovery than traditional airlines, probably due to their greater flexibility.



### 03 » COMPETITION BETWEEN PASSENGER AIRPORTS

#### Passengers in Belgian airports

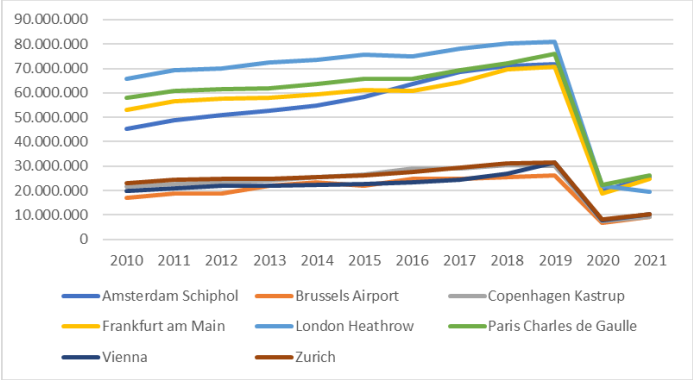
Brussels Airport had a market share of 74% before the crisis. In 2021 Brussels Airport's market share was **68.6%**, down from 2019. Charleroi increased its market share to 28.1% in 2021 from 23.1% in 2019.



Charleroi recovered better after the crisis than Brussels Airport. This is probably due to the greater resilience of *low-cost* airlines (very popular at Charleroi) which adjust their offer more easily to the economic situation. This also applies to the *leisure* segment.

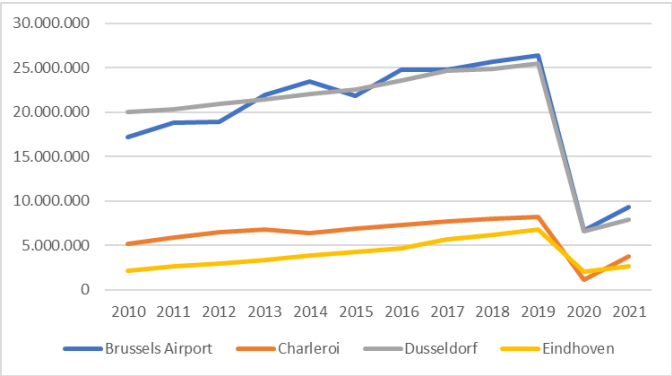
#### Passengers in benchmark airports

In 2021, Brussels Airport **grew by 39% compared to 2020**, the highest growth rate among the benchmark airports. However, Brussels Airport was still down 65% from 2019. The average growth of the benchmark airports was **23% but remained down 67% from 2019**. It is clear that large airports (such as Charles de Gaulle and Schiphol) recovered more slowly than smaller airports similar to Brussels Airport (such as Vienna). It should be noted that only London Heathrow experienced a drop in passenger numbers. According to the CEO of Heathrow Airport, the continued decline was due to travel restrictions caused by the COVID crisis that were stricter than in continental Europe and often announced at the last minute.



#### Passengers in Catchment Area airports

Airports with a similar profile to Brussels Airport and geographically close to Brussels Airport (catchment area) experienced much more modest growth and in any case lower than Brussels Airport (+20% in Düsseldorf, +28% in Eindhoven, etc. against +39% for Brussels Airport). The only exception was Charleroi, whose passenger numbers increased more than those of Brussels Airport.



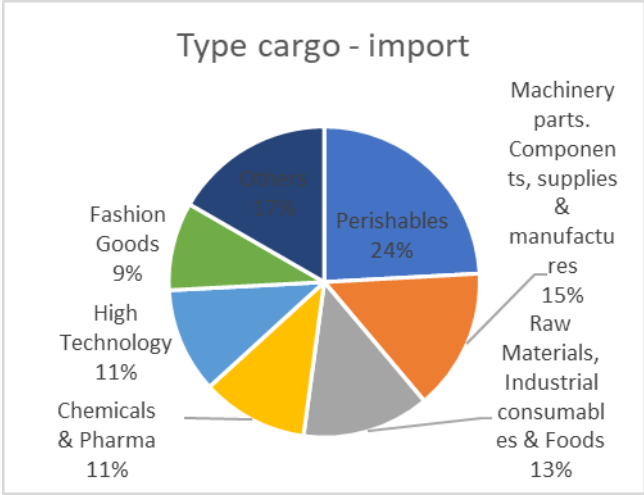
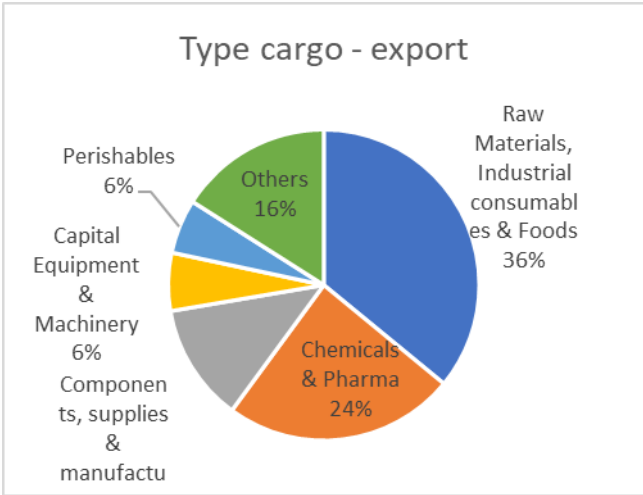
Compared to 2019, the number of passengers at airports located in the catchment area of Brussels airport was still 62% lower than the average for the airports concerned. In this area, only in Dusseldorf was there a greater decline than at Brussels Airport (69% vs. 65%).

# 04 » FREIGHT TRANSPORT AT BRUSSELS AIRPORT

## Types of goods

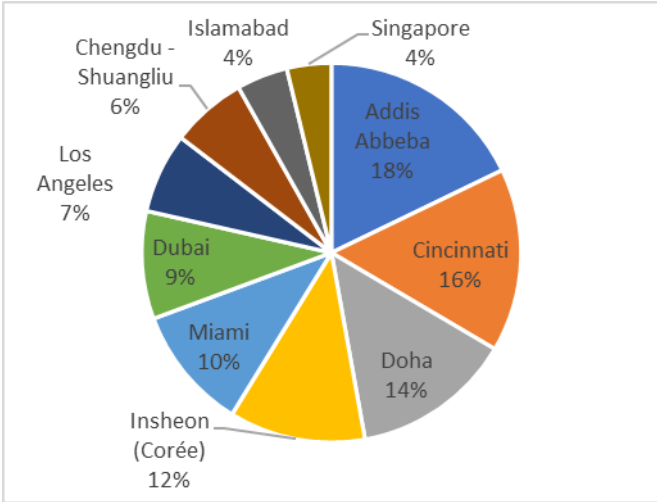
The majority of the goods exported from Brussels Airport were raw materials and products from the pharmaceutical industry. This last category was of particular importance given the excellence of this industry in Belgium. However, there were no major changes in the percentage of goods categories exported by air.

In terms of imports, the largest category remained that of perishable products.



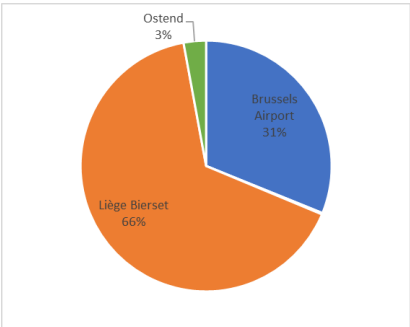
## Top 10 destinations

There were no major changes in the top ten destinations, which were concentrated exclusively outside Europe. The top 8 remained the same. However Istanbul dropped out of the top 10 and was replaced by Islamabad (flights operated by Turkish Airlines).



# 05 » COMPETITION FROM CARGO AIRPORTS

## Cargo in Belgian airports



The volume of cargo transported from Belgian airports increased overall in 2021.

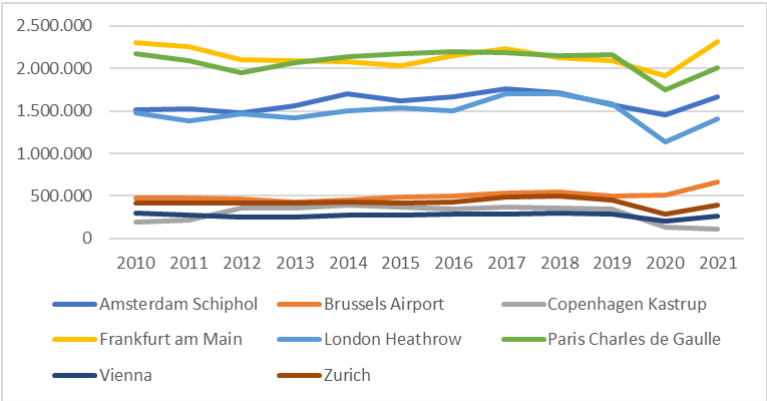
Belgium strengthened its logistical role in Europe, especially but not only for the pharmaceutical and vaccine industries. This partly explains this growth.

Brussels Airport's **market share** remained stable in 2021 at **31%**. Liège and Ostend airports grew by 26% and 18% respectively.

## Cargo in benchmark airports

In two years, the **share of Brussels Airport in the volume of goods transported from the benchmark airports** increased from 5.5% before the crisis to **7.6% in 2021**.

Although the average cargo volume of the benchmark airports was up 20% in 2020, it remained 7% lower than in 2019. Compared to Brussels Airport (+31% and +33% compared to 2019), other airports experienced more modest growth compared to 2020 such as Frankfurt (+21% but +11% compared to 2019) and Amsterdam (+15% but +6% compared to 2019).



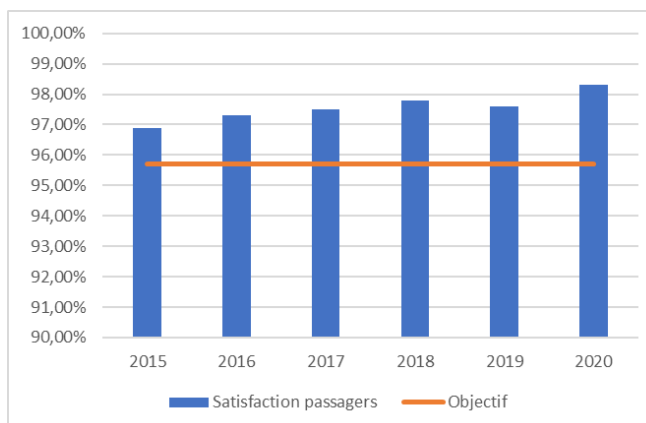
## 06 » QUALITY AT BRUSSELS AIRPORT

The chapter below mentions the figures for 2020. Due to the global sanitary crisis, some indicators could not be measured because they would have been incorrect or irrelevant. The data for the subjective indicators was therefore limited to the first quarter of 2020.

### Passenger satisfaction indicators

The passenger satisfaction rate was 98.3% in the first quarter of 2020. Satisfaction was up from 2019.

Of all the indicators measuring passenger satisfaction, only one shows a lower satisfaction rate than the objectives, namely that relating to the clarity of the airport's website (65% against an objective of 80%).



All other indicators exceeded targets. The results were actually better than in 2019. Only the indicators relating to the distance to travel within the terminal (even though it was one of the best scores) and the check-in waiting times were slightly down.

| Top 3 - best scores (compared to target)      | target | 2020 | 2019 |
|---|--------|------|------|
| Walking distances inside the terminal         | 73,9   | 85,8 | 87,3 |
| Speed of baggage delivery                     | 81,6   | 89,2 | 86,2 |
| Ease of making connections with other flights | 86,4   | 93,7 | 92,0 |

| Top 3 - worst scores (compared to target)                | target | 2020 | 2019 |
|--|--------|------|------|
| Clarity of the Brussels Airport Website                  | 80     | 65   | 86,2 |
| Waiting time in check-in queue/line - self-service kiosk | 94,1   | 94,4 | 94,8 |
| Cleanliness of airport terminal                          | 95,8   | 97,6 | 96,9 |

### Objective measurement indicators (available 12 months)

Seven objective indicators were below standards. It is not impossible that this situation is essentially due to the COVID crisis.

| Top 3 - best scores (compared to target)            | target | 2020    | 2019   |
|---|--------|---------|--------|
| Marshaller on time performance                      | 90,00% | 98,84%  | 98,46% |
| Docking satisfaction of dockable passenger aircraft | 80,00% | 87,09%  | 84,05% |
| Availability of FOD program                         | 95,00% | 100,00% | 99,75% |

| Top 3 - worst scores (compared to target)             | target | 2020  | 2019  |
|---|--------|-------|-------|
| Customer availability of preconditioned Air           | 98,0%  | 85,8% | 85,8% |
| Customer availability of 400 Hz units                 | 98,0%  | 90,4% | 90,4% |
| Availability of inbound baggage transportation system | 99,0%  | 93,8% | 95,4% |

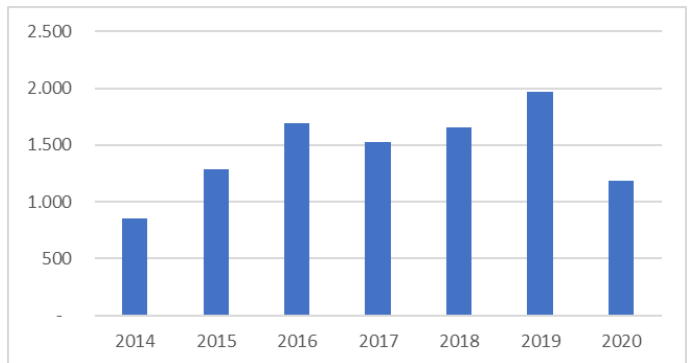


## 06 » THE QUALITY AT BRUSSELS AIRPORT

### Complaint handling

The number of complaints totalled 1,185 in 2020, down 40% from 2019. This ratio increased significantly when the number of complaints was compared to the number of passengers (-74%).

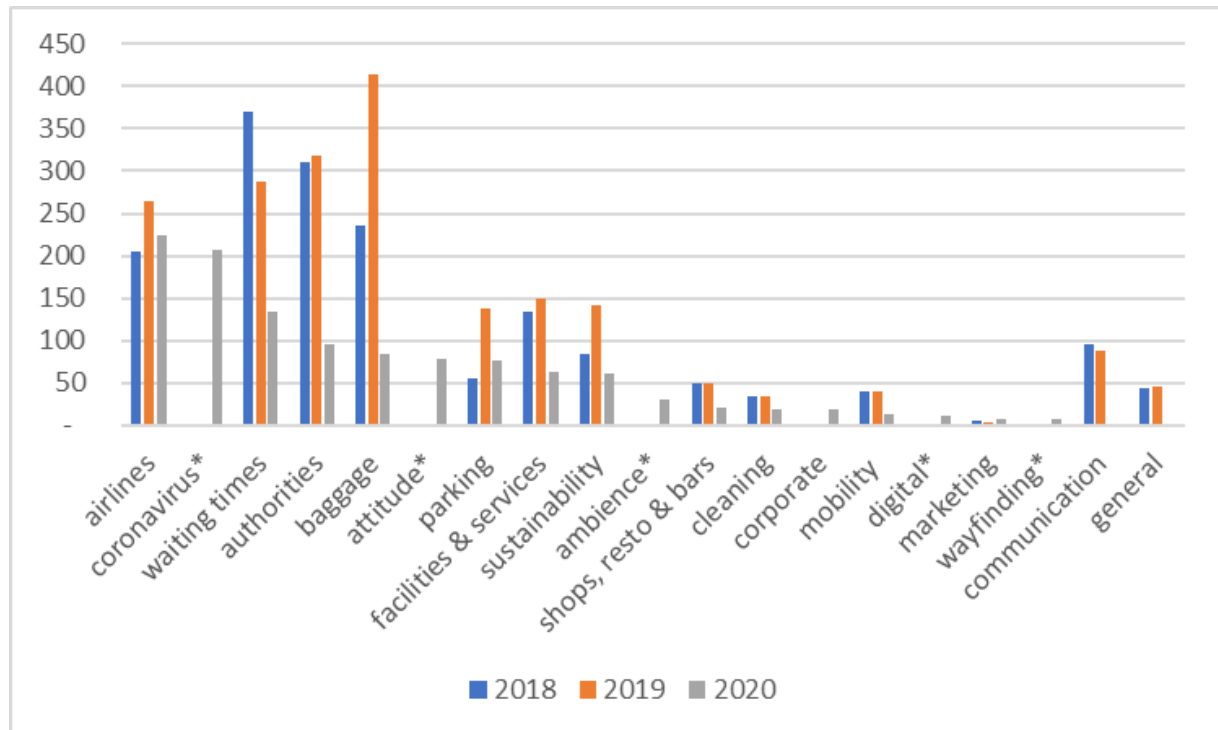
This relatively high number of complaints is explained by the long waiting times at security and border controls, linked to the COVID measures.



### Complaints by category

In 2020, 51% of complaints were directed to BAC directly (compared to 54% in 2019) and 49% to third parties.

A large proportion of the complaints were directed at the airlines (cancellations, refunds, questions about flights). There were also a lot of complaints related to the COVID crisis (testing, reporting of results). Waiting times remained a major concern for passengers. Complaints in the other categories were low.



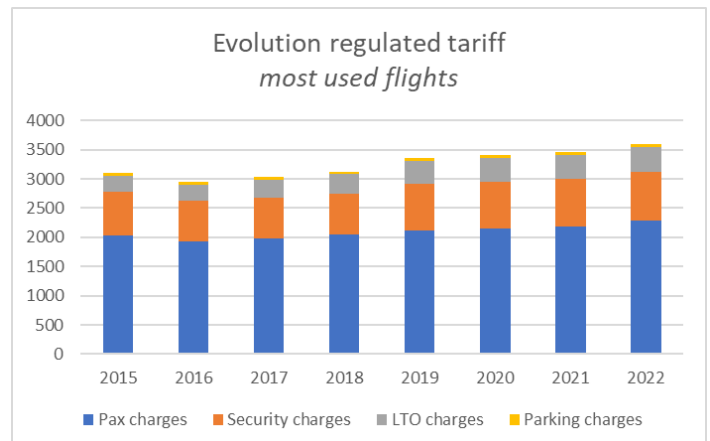
## 07 » BRUSSELS AIRPORT TARIFFS

### Brussels Airport regulated tariffs

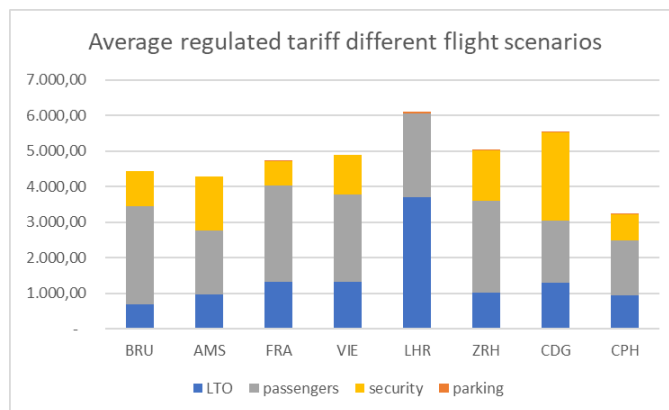
The table opposite shows the evolution of the various regulated charges.

Tariffs were frozen for the past two years (except for indexation). They therefore remained very stable.

Tariff consultations were held in the first half of 2022 to set rates for the period 2023-2028 and resulted in a proposal by BAC.



### Regulated tariffs in benchmark airports



Brussels Airport's tariffs were more or less in line with the average for the reference airports. Passenger taxes were higher than most benchmark airports. On the other hand, security taxes were lower than in the nearest benchmark airports (Paris and Amsterdam).