



## **MARKET MONITORING BRUSSELS AIRPORT – FIGURES 2022**

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## 01 » EVOLUTION OF TRANSPORT AT BRUSSELS AIRPORT

### Passengers by type

In 2022, the number of passengers amounted to **18,930,698**, i.e. a **102%** increase over 2021 **but still down 28% from 2019**.

This recovery from 2021 was significant and accelerated throughout the year. For the first three quarters of 2023, there is a 20% increase compared to 2022.

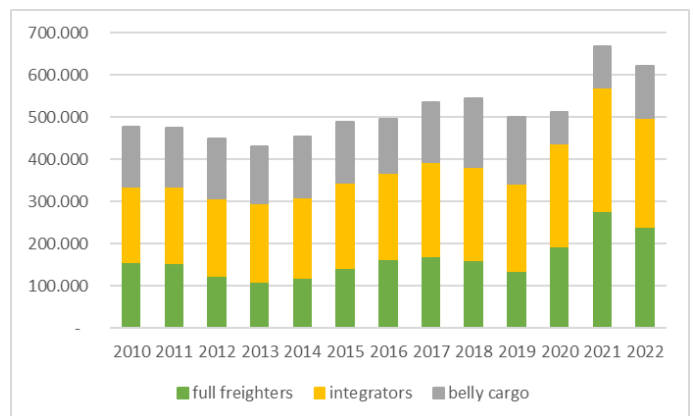
In 2022, 15% of departing passengers were in transfer and 0.6% in transit<sup>1</sup>.



### Freight by type of carrier

Freight activity fell back slightly in 2022, following a sharp increase in 2021. In 2022, **621,482 tons** were transported to or from Brussels Airport, i.e. a **7% decline** compared to 2021 but at the same time a **24% increase** compared to 2019. Overall, an upward trend has been recorded since 2014. But there is a fall of 4.7% for the first three quarters of 2023.

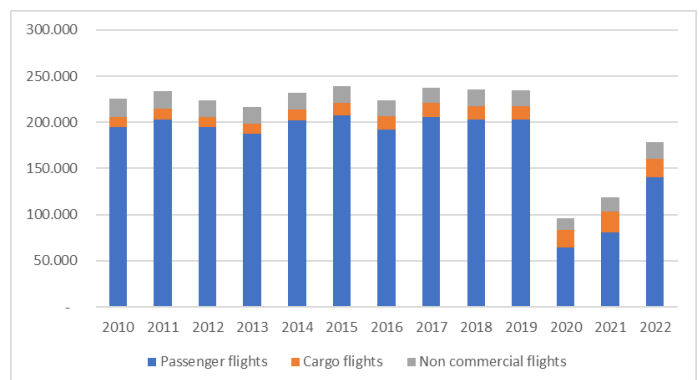
39% of the volume was transported by *full freighters*<sup>2</sup>, 41% by *integrators* and 20% by *belly cargo*<sup>3</sup>. There is a relative increase in this last category.



### Number of flight movements

In 2022, **178,930 flight movements** were recorded at Brussels Airport, **up 51% compared to 2021** but still down 24% from 2019.

The number of passenger movements amounted to 140,365 (up 73% from 2021 but still down 31% from 2019). The number of cargo movements amounted to 20,340 (-10% from 2021 and +39% from 2019).



<sup>1</sup> Passengers who land between the starting point and final destination of their journey and then board a connecting flight with the same flight number are referred to as transit passengers. Transfer passengers are those who arrive from their departure point or a previous stopover and are awaiting another flight before heading off to their final destination.

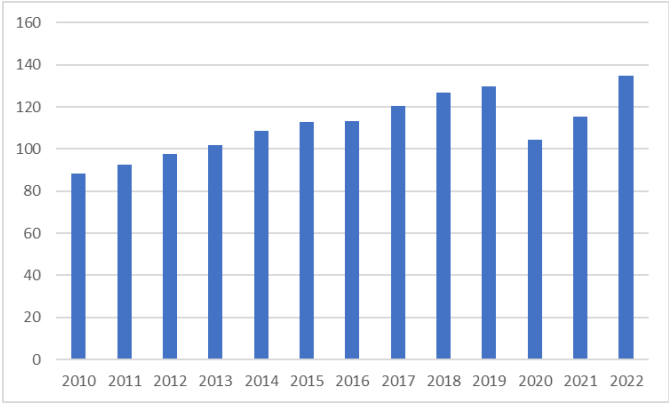
<sup>2</sup> All-cargo flights.

<sup>3</sup> Passenger flights with cargo.

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

### Number of passengers per flight

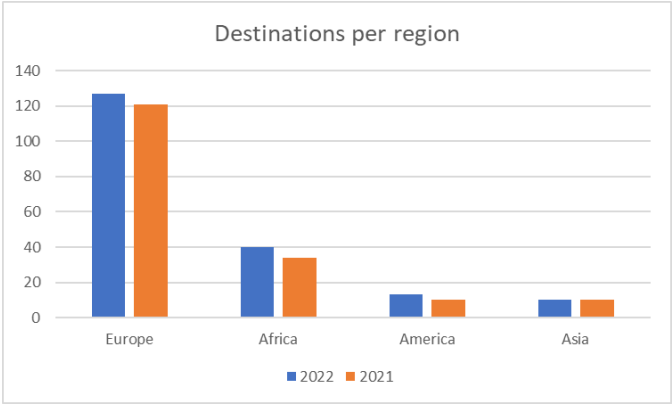
The average number of passengers per flight was 134.87, up 17% from 2021 and also up 4% from 2019. It should be noted that airlines have brought new and larger aircraft into service and have higher occupancy rates.



### Number of destinations

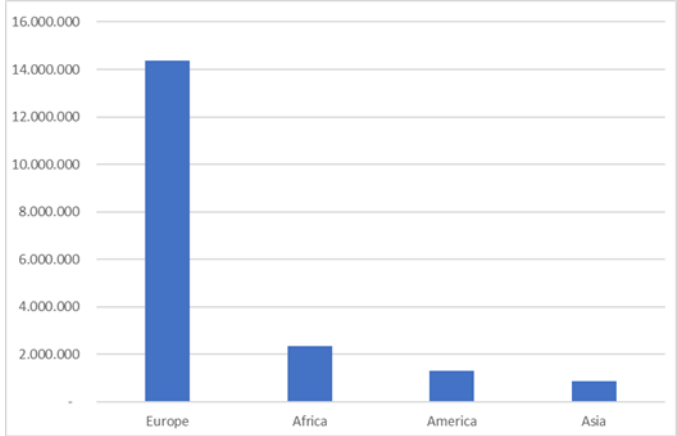
Brussels Airport served 190 destinations in 2022, i.e. 15 more than in 2021.

There was an increase in destinations in Europe and Africa, a stabilisation in destinations in Asia and a slight decrease in destinations in the Americas.



### Passengers by continent

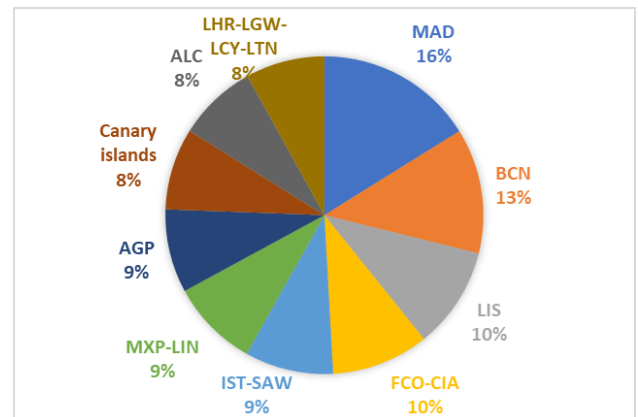
In terms of final destination, passengers travelling to Europe represented more than 76% of those using Brussels Airport, compared to 66% in 2021. Moreover, there was a significant number of passengers with destinations in Africa (2.3 million passengers compared to 1.3 million in 2021). Just under 900,000 passengers travelled to Asia and almost 1.3 million to the Americas, compared to 300,000 in 2021.



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

### Top 10 destinations

There is no significant change in the ranking of the most popular destinations compared to 2021. The top three remains unchanged, i.e. Madrid, Barcelona and Lisbon.



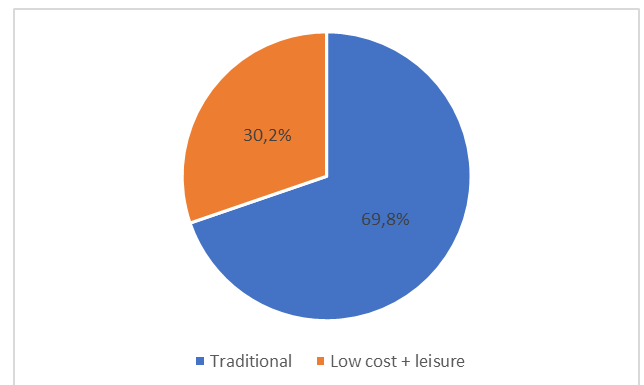
### Market shares by type of airline

Traditional airlines (other than *low-cost* and *leisure*) represent 70% of the market.

The market share of these airlines increased by 2% compared to 2021. *Low-cost* and *leisure airlines* (cf. *charter flights*) have a significant market share of nearly one third.

Compared to last year, the market share of low-cost and leisure airlines (Ryanair, Easy jet, TUI, etc.) slightly decreased from 32 to 30%.

This leads to a certain rebalancing, due in part to a slightly later recovery of the so-called traditional airlines, which took effect in 2022, and a fall in Ryanair traffic.

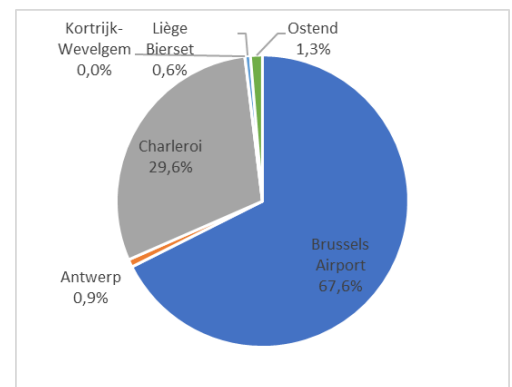


### 03 » COMPETITION BETWEEN PASSENGER AIRPORTS

#### Passengers in Belgian airports

Brussels Airport had a **market share** of 74% before the crisis. In 2022, the market share of Brussels Airport was **67.6%**, down 1% from 2021. Charleroi increased its market share to almost 30% compared to 23.1% in 2019.

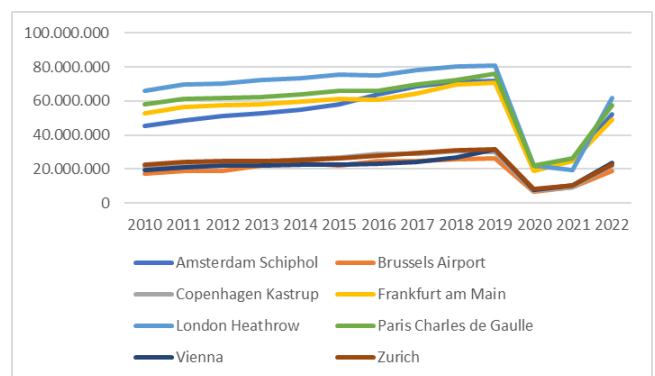
Charleroi recovered better after the crisis than Brussels Airport and already regained and even exceeded its 2019 passenger traffic figures. This shows that, notwithstanding the recovery of the traditional airlines at Brussels Airport, the low-cost/leisure sector remains a powerful growth driver in the aviation sector, in a context where charges at Charleroi are particularly low.



#### Passengers in reference airports

In 2022, Brussels Airport recorded a 102% increase compared to 2021, which is less than the average of 129% for the reference airports. However, Brussels Airport is still down 28% from 2019, equalling the average for reference (-27%). While BAC already had more passengers than reference airports in 2021, the latter caught up in 2022.

There was also a spectacular recovery at London Heathrow (+218%), as a result of a catch-up effect after its poor performance in 2021, when it continued to lose passengers. Without London Heathrow, reference airports grew by 116%.

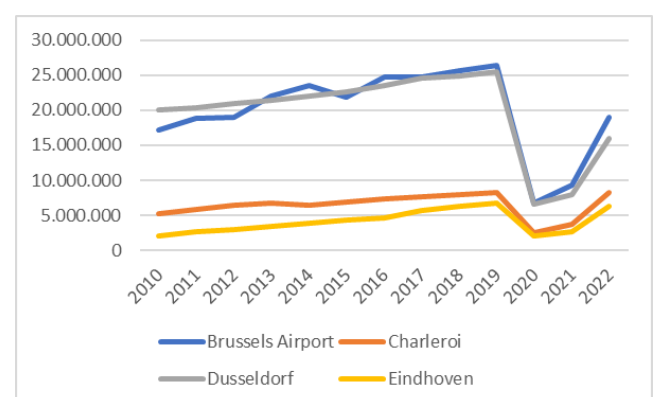


#### Passengers in catchment area airports

Airports with a similar profile and geographically close to Brussels Airport (*catchment area*) experienced a much stronger growth (115%) than Brussels Airport in 2022 compared to 2021 (102%). Only Düsseldorf recorded a growth similar to that of Brussels Airport.

Compared to 2019, passenger traffic at these airports is on average down 18% (28% for Brussels Airport).

It should be noted that in this area, small airports - often used by low-cost/leisure operators - recover faster than medium-sized and large airports (down - on average - by 3% to 33%).

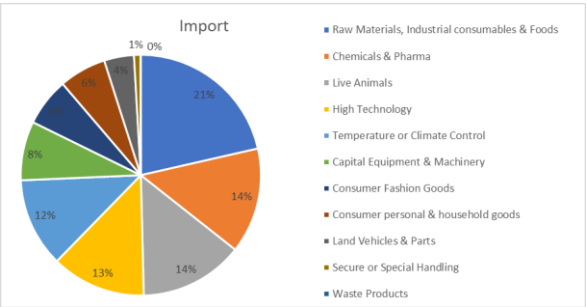
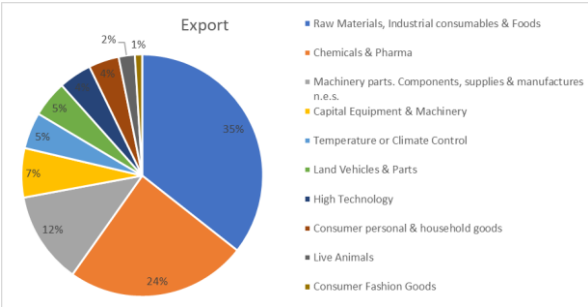


# 04 » FREIGHT TRANSPORT AT BRUSSELS AIRPORT

## Types of goods

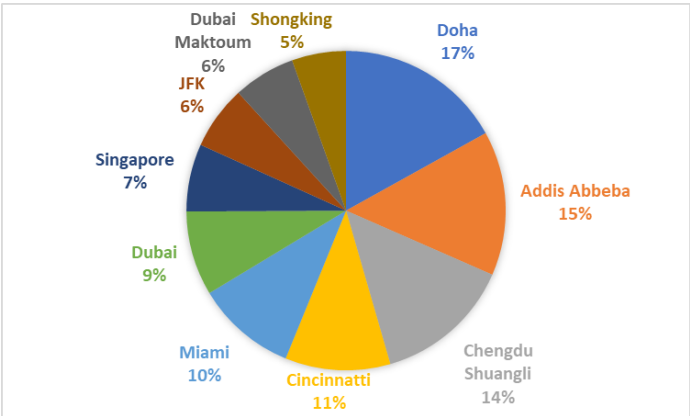
The majority of the goods exported from Brussels Airport were, as in previous years, raw materials and products from the pharmaceutical industry.

As far as imports are concerned, the types of goods imported are more diversified. The most important categories are raw materials, chemical & pharmaceutical products and live animals. These three categories account for 49% of imported goods.



## Top 10 destinations

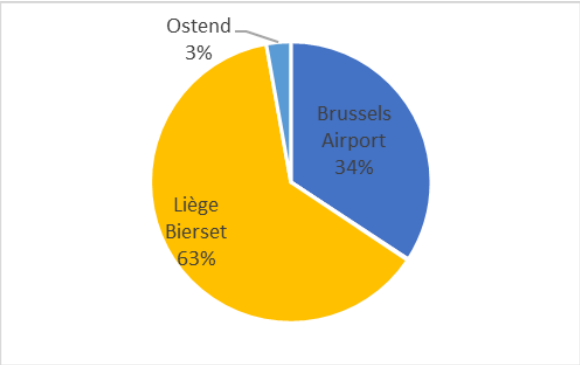
There have been significant changes in the top ten destinations, which are concentrated exclusively outside Europe, unlike last year when Istanbul featured in the ranking. It should be noted that there are 3 airports from the Emirates (compared to 2 last year) and two Chinese airports (compared to 1 last year) in the top 10 destinations.



# 05 » COMPETITION BETWEEN CARGO AIRPORTS

## Cargo in Belgian airports

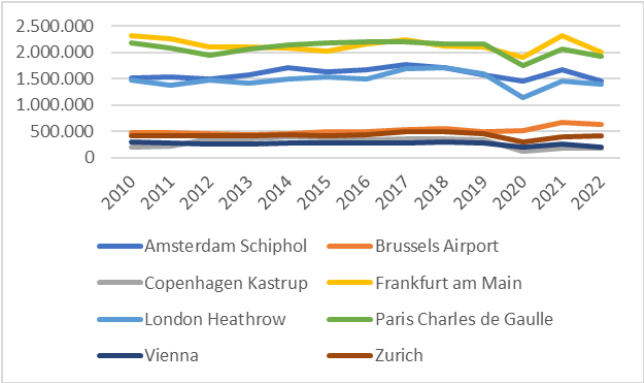
The volume of cargo transported from Belgian airports fell by 15% in 2022, after an exceptional 2021. This decrease is due, among other things, to lower volumes of vaccines exported or imported following the end of the Covid crisis. This trend is set against a macroeconomic backdrop in which both exports and imports rose by almost €35 billion in 2022. Therefore, the decline in volume is more likely to be attributable to sectoral or operational factors.



The **market share** of Brussels Airport rose to **34%** in 2022. That of Liège fell to 63%. The market share of Ostend remained stable, and that of Antwerp and Charleroi is negligible.

## Cargo in reference airports

With the exception of Copenhagen and Zurich, virtually all reference airports recorded a fall compared to 2021: Frankfurt (-13% and down 4% from 2019), Amsterdam (-13% and down 8% from 2019). Compared to both 2019 and 2021, the performance of Brussels Airport was significantly better than that of the “smaller” reference airports such as Vienna and Copenhagen. If we compare the development in Brussels Airport to that of the “major” reference airports, Brussels Airport declined in a relatively similar way compared to 2021. Brussels Airport recorded higher volumes than in 2019 (+24%) unlike all the other major airports (-11%).



## 06 » QUALITY AT BRUSSELS AIRPORT

### Passenger satisfaction indicators

The passenger satisfaction rate reached 98.6% in 2021, i.e. a better result than in 2020. Overall, satisfaction has been growing for several years.

Of all indicators measuring passenger satisfaction, only one shows a lower satisfaction rate than the standard, namely that relating to the clarity of the website of the airport (67.1% against a standard of 80%, compared to 65% in 2020).

All other indicators exceeded targets. However, not all indicators could be measured in 2021, such as the availability and quality of passenger transport within the airport, travel distances within the airport, ease of connections with other flights... Brussels Airport explains this absence of measurement by the circumstances linked to the Covid crisis which, according to Brussels Airport, could have distorted or biased the results.



Top 3 - best scores (compared to target)	target	2021	2020	2019
Comfort of waiting areas/gate areas	86,9	94,6	91,4	90,3
Ease of navigating through the airport	91,1	97,8	96,0	96,0
Cleanliness of washrooms/toilets	84,3	90,3	86,7	84,2

Top 3 - worst scores (compared to target)	target	2021	2020	2019
Clarity of the Brussels Airport Website	80	67,1	65	86,2
Waiting time in check-in queue/line - desk	91,9	92,3	94,7	90,4
Cleanliness of airport terminal	95,8	98	97,6	96,9

### Objective performance indicators (availability 12 months)

Ten objective indicators out of a total of 17 measured were above standards. The tables below show the three best and three worst performance indicators.

Top 3 - best scores (compared to target)	target	2021	2020	2019
Marshaller on time performance	90,0%	98,7%	98,8%	98,5%
Docking satisfaction of dockable passenger aircraft	80,0%	97,8%	87,1%	84,1%
Availability of FOD program	95,0%	100,0%	100,0%	99,8%

Top 3 - worst scores (compared to target)	target	2021	2020	2019
Customer availability of preconditioned Air	98,0%	85,8%	85,8%	85,8%
Customer availability of 400 Hz units	98,0%	90,4%	90,4%	90,4%
Availability of inbound baggage transportation system	99,0%	93,8%	93,8%	95,4%

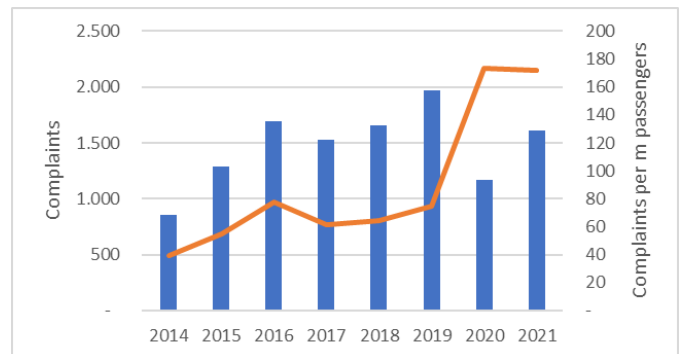


## 06 » QUALITY AT BRUSSELS AIRPORT

### Complaint handling

The number of complaints totalled 1,612 in 2021, up 38% from 2020. In relation to passenger numbers, the trend is slightly going down.

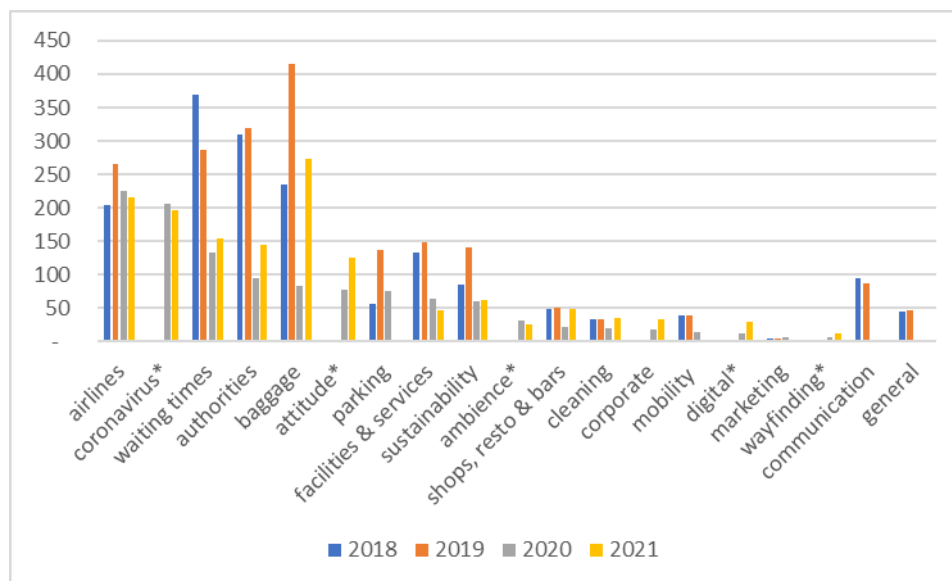
The relatively high number of complaints in 2020 and 2021 is - mainly - attributable to the long waiting times at security and border controls, linked to the COVID measures.



### Complaints by category

In 2021, 60% of complaints were addressed to BAC directly (compared to 51% in 2020) and 40% to third parties (compared to 49% in 2020).

A large proportion of complaints were related to baggage handling or airline matters (cancellations, refund, questions about flights). There are still almost 200 complaints relating to Covid rules.

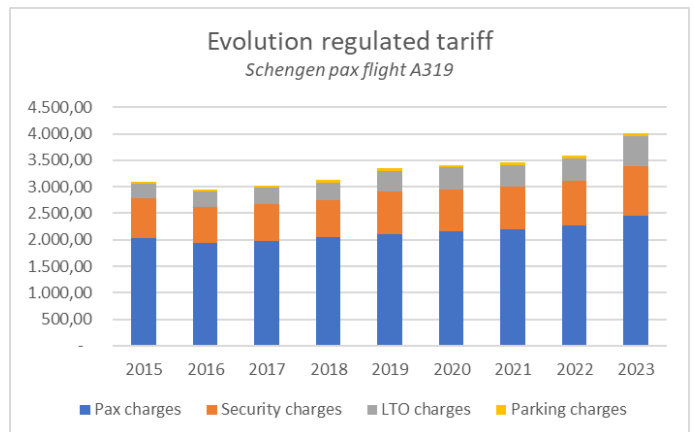


## 07 » BRUSSELS AIRPORT TARIFFS

### Brussels Airport regulated tariffs

The table opposite shows the evolution of the different regulated charges (for the mostly used type of flight, i.e. an Airbus A319 within the Schengen area).

Under the new structure, which has come into effect in 2023, tariffs rise significantly, by almost 11.7%. This is mainly due to indexation. Their evolution depends on certain factors such as the type of aircraft used, the period, the destination, etc. It does not take into account certain incentives put in place by the airport operator, which may contribute to reducing the amount of the charges.



### Regulated tariffs in reference airports

The tariffs at Brussels Airport are more or less in line with the average for the reference airports. Under the new pricing structure, passenger charges at Brussels Airport remain higher than at most reference airports. On the other hand, security charges are lower than at most reference airports. It should be noted that in the coming years, the pricing structure at Brussels Airport will lead to a reduction in passenger charges that will be offset by an increase in LTO charges.

