



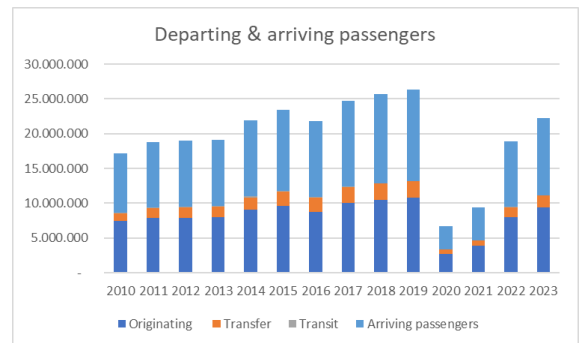
## **MONITORING BRUSSELS AIRPORT – 2023 FIGURES**

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## 01 » THE EVOLUTION OF TRANSPORT AT BRUSSELS AIRPORT

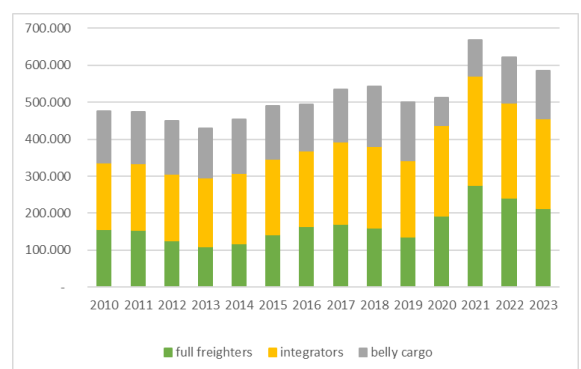
### Passengers by category

In 2023, the number of passengers reached **22,200,755**. This represents an increase of **17%** compared to 2022, **but is still a decrease of 16% compared to 2019**. In 2023, 15% of the passengers arriving at Brussels Airport were transfer passengers<sup>1</sup>. The number of transfer passengers increased by 21% compared to 2022. This significant increase seems to demonstrate the growing role of Brussels Airport's as a hub.



### Freight by type of carrier

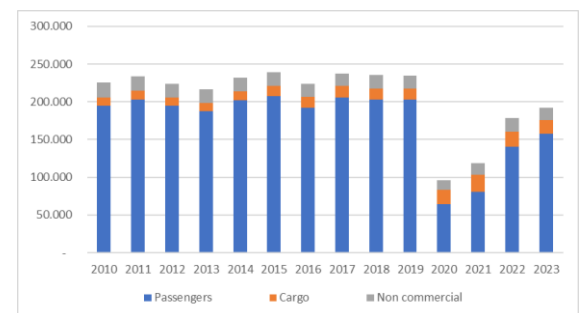
Freight activity slightly declined again in 2023 after a significant rise in 2021. In 2023, **585,203 tons** were transported to or from Brussels Airport. This represents a **6% decrease** compared to 2022, but this figure is still up by 17% compared to 2019. 36% of the volume was handled by 'full freighters'<sup>2</sup> (down 11% compared to 2022), 41% by integrators (- 6%) and 22% via 'belly cargo'<sup>3</sup> (+ 4.5% compared to 2022).



### The number of air movements

In 2023, there were **192,257 air movements at Brussels Airport**. This figure is a **7% increase compared to the previous year**, but is still 18% however than in 2019.

The number of passenger movements amounted to 157,438 (a 12% increase compared to 2022 but still 23% lower than in 2019). The number of cargo movements totaled 18,776 (- 8% compared to 2022 and up 28% compared to 2019).



<sup>1</sup> Passengers with a layover of less than 24 hours, anywhere between the departure point and the final destination of their journey, who board a connecting flight are called transfer passengers. Passengers who land between the departure point and the final destination of their journey and board a connecting flight with the same flight number are called transit passengers.

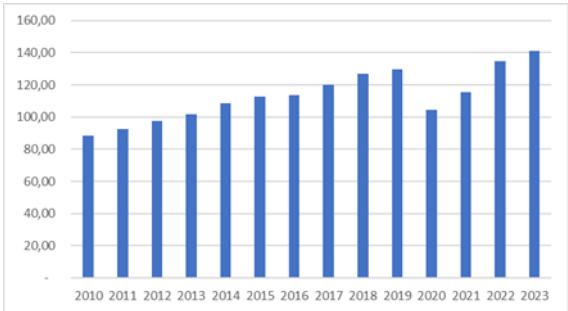
<sup>2</sup> All-cargo flights.

<sup>3</sup> Passenger flight with cargo

## 02 » PASSENGERS' TRANSPORT BRUSSELS AIRPORT - KPI's & trends

### Number of passengers per flight

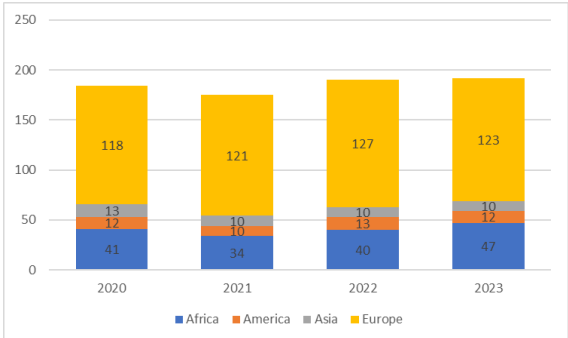
The average number of passengers per flight is 141, an increase of 5% compared to 2022 and also up by 9% compared to 2019. This likely reflects a higher occupancy rate.



### Number of destinations

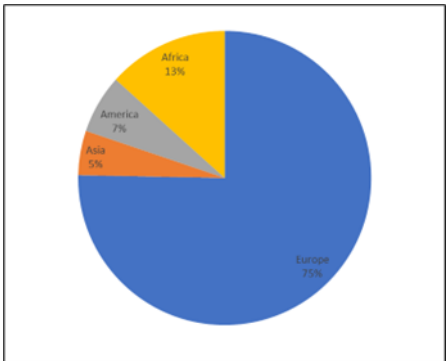
Brussels Airport served 192 destinations in 2023, which is 2 more than in 2022.

There is a slight increase in destinations to Africa and a slight decrease or stabilization to other continents.



### Passengers by continent

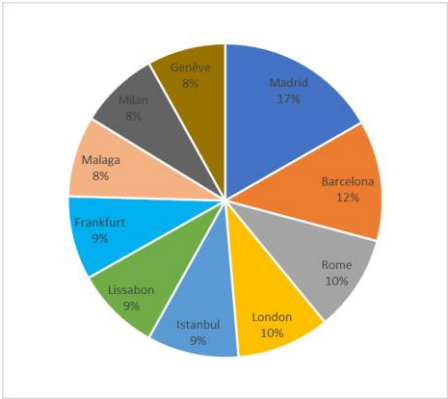
As for the continents of origin or destination, passengers travelling to or from Europe account for more than 75% (16.7 million passengers passing through Brussels Airport in 2023 compared to 14.4 million in 2022). There is a significant number of passengers travelling to or from Africa (nearly 3 million passengers compared to 2.3 million in 2022). Just under 1.1 million passengers are travelling to or from Asia (compared with 900,000 in 2022) and nearly 1.5 million passengers are travelling to or from the Americas, compared to 1.3 million in 2022.



### Top 10 destinations

There are a few changes in the ranking of the most popular destinations compared to 2022. The top 2 most-frequented destinations remain unchanged, namely Madrid and Barcelona. Rome, London and Istanbul complete the top 5, with Lisbon dropping out of the top 5. The top 10 of the destinations is fully European.

It is interesting to examine the top 5 destinations to other continents. For Africa, the top destinations are Casablanca, Hurghada, Nador, Addis Ababa and Kinshasa. For the Americas, the top destinations are New York,



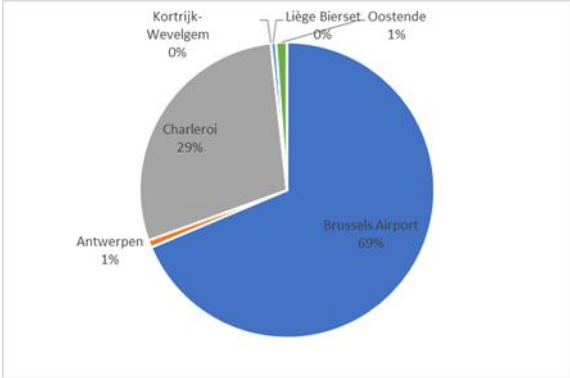
Washington, Montreal, Chicago and Punte Cana. Finally, for Asia, the top destinations are Dubai, Doha, Tel Aviv, Abu Dhabi and Beijing.

### 03 » COMPETITION BETWEEN PASSENGERS AIRPORTS

#### Passengers at Belgian airports

Before the crisis, Brussels Airport's **market share** was 74%. In 2023 Brussels Airport's market share was of **68.7%**, up by 1% compared to 2022. Charleroi, while developing positively, reduced its market share to 28.8% compared to 29.6% in 2022.

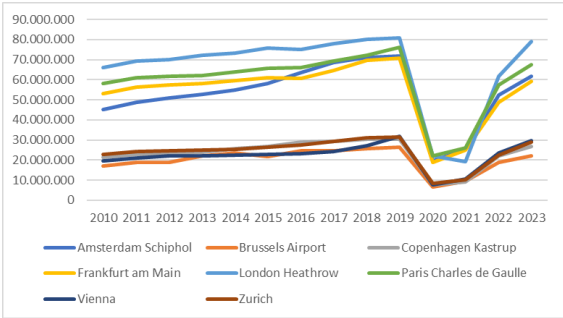
We can observe a very slight improvement in Brussels Airport's market share at the expense of Charleroi. However, Charleroi still maintains a much better market share than before the COVID crisis, when it stood at 23.1%.



#### Passengers at reference airports

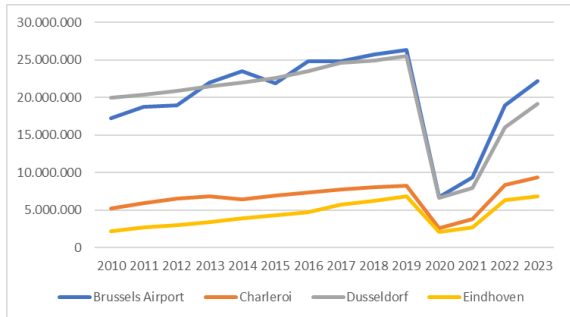
In 2023, Brussels Airport saw an increase of 17% compared to 2022, which is less than the reference airport average of 22%. However, Brussels Airport remains down by 16% compared to 2019, which is slightly worse than the average of reference airports (-11%).

London Heathrow continues to grow strongly (+29%) and is now only 2% below its 2019 levels. This increase is mainly due to a higher number of passengers per flight and a growth in the load factor (79.5% compared to 76.7% in 2022). Additionally, the average number of passengers per flight at Heathrow in 2023 was 218.9, which is significantly higher than what is observed at Brussels Airport (141).



#### Passengers at airports in the catchment area

Airports with a similar profile to Brussels Airport, geographically located close to Brussels Airport (*catchment area*), experienced less growth than Brussels Airport in 2023 compared to 2022 (14% vs. 17%). Only Düsseldorf experienced a higher growth rate than Brussels Airport (20%). Smaller airports are recovering more quickly to their pre-COVID levels.

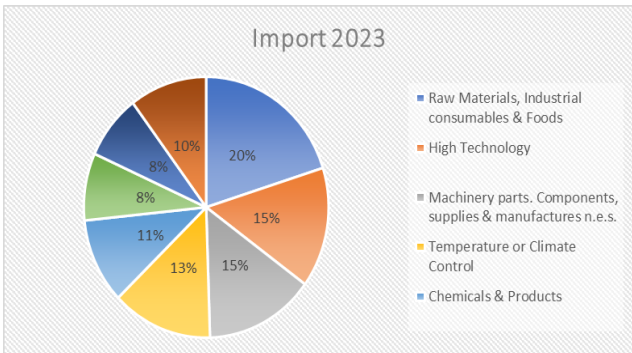
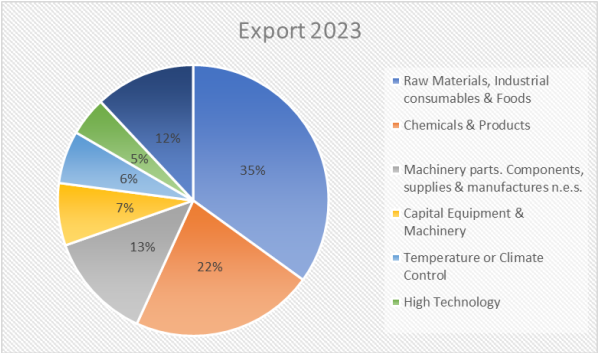


# 04 » FREIGHT TRANSPORT AT BRUSSELS AIRPORT

## Types of goods.

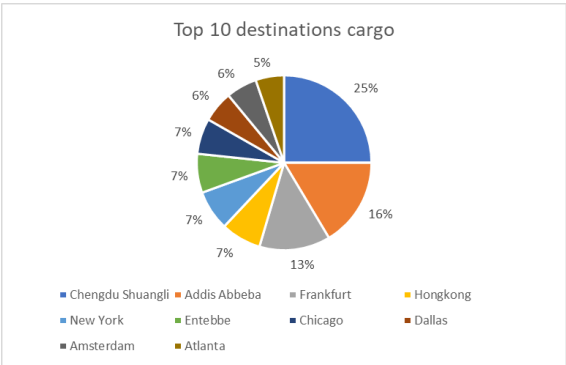
Exports of goods from BrusselsAirport mainly consist of raw materials, chemical and pharmaceutical products and machinery components, similarly to last year.

As for imports, the most important categories are raw materials, high-tech products and machinery components. These last three categories account for 49% of imported goods. There is a shift compared to last year's the top 3 imports, with high-tech products now appearing in the list.



## Top 10 destinations

There are significant changes in the top ten destinations. There are two European airports in the top 10 (compared with 0 in 2022) and even one in the top 3, which is Frankfurt airport. Amsterdam is in 9<sup>th</sup> place. The top 2 places are held by Chengdu and Addis Ababa airports. There are no longer Gulf airports in the top 10, but there are now four American airports.

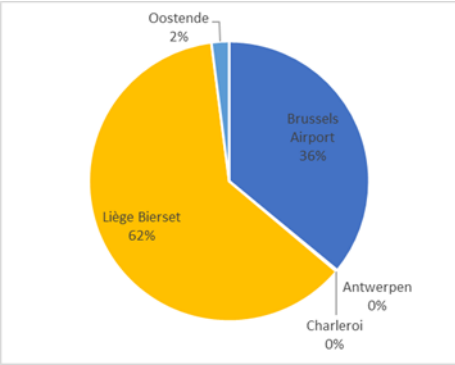
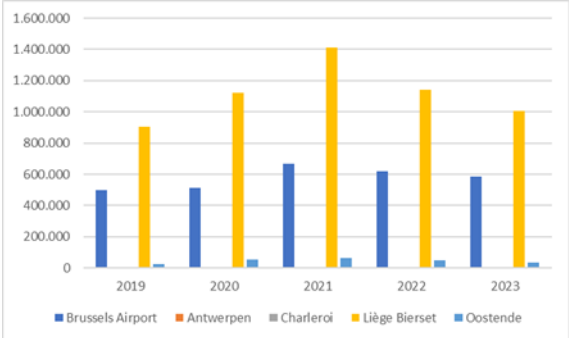


# 05 » COMPETITION BETWEEN CARGO AIRPORTS

## Freight in Belgian airports

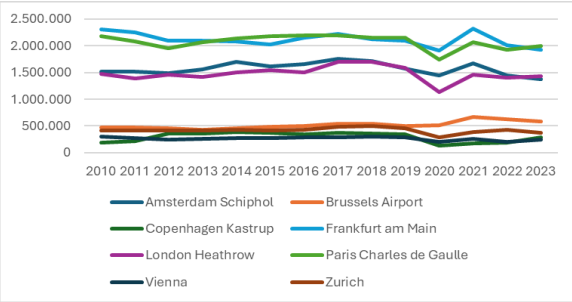
The volume of freight transported from Belgian airports declined by another 10% in 2023, following a 15% from in 2022, which followed an exceptional year in 2021. This decline occurs in a macroeconomic context where both exports and imports decreased by nearly 14% in 2023 across all sectors, particularly in chemicals and pharmaceuticals (-15.7% on imports and -23.3% on exports) and precious goods (metals and diamonds) (-41.3% on imports and -34.4% on exports)<sup>4</sup>.

Brussels Airport's **market share** has increased further, reaching **36%** in 2023 compared to 34% in 2022. Liège's market share has fallen further to 62%. Ostend's market share has slightly decreased to 2% while the shares of Antwerpen and Charleroi are negligible.



## Freight in reference airports

There is a fairly mixed trend, with increases at Paris Charles de Gaulle (4%), London (2%) and Vienna (21%) and decreases at other airports. However, the average, including Brussels Airport, remains stable, with moderate variations between airports (except for Vienna).



<sup>4</sup> Sources: National Bank of Belgium, press release dated 15 February 2024.

## 06 » QUALITY AT BRUSSELS AIRPORT

### Passenger satisfaction indicators

The passenger satisfaction rate reached 97.7% in 2023. Satisfaction has slightly decreased compared to 2022. Overall, after several years of growth, satisfaction has declined.

Among all the indicators measuring passenger satisfaction, three showed satisfaction levels below the standard (compared to just one in 2021 and six in 2022): the indicator related to the clarity of the airport's website and those related to waiting times at check-in counters and at the self-service kiosks.

All the other indicators exceeded their targets in 2023.



Top 3 - best scores (compared to target)	target	2023	2022	2021	2020	2019
Comfort of waiting areas/gate areas	86,9	88,9	88,0	94,6	91,4	90,3
Ease of navigating through the airport	91,1	96,7	97,0	97,8	96,0	96,0
Cleanliness of washrooms/toilets	84,3	87,7	82,0	90,3	86,7	84,2

Top 3 - worst scores (compared to target)	target	2023	2022	2021	2020	2019
Clarity of the Brussels Airport Website	80,0	68,6	69,0	67,1	65,0	86,2
Waiting time in check-in in queue line -self service kios	94,1	91,4	88	N/A	94,4	94,8
Waiting time in check-in queue/line - desk	91,9	90	86	92,3	94,7	90,4

### Objective measurement indicators (12-month availability)

Eleven objective indicators out of a total of 19 measured were above the standards. The tables below present the three best-performing indicators as well as the three worst.

Top 3 - best scores (compared to target)	target	2023	2022	2021	2020	2019
Docking satisfaction of dockable passenger aircraft	80,0%	99,1%	99,0%	97,8%	87,1%	84,1%
Marshaller on time performance	90,0%	99,1%	99,1%	98,7%	98,8%	98,5%
Runway conformity	95,0%	99,9%	100,0%	100,0%	100,0%	100,0%

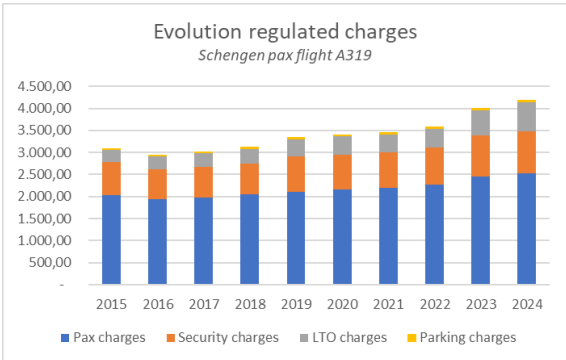
Top 3 - worst scores (compared to target)	target	2023	2022	2021	2020	2019
Dwelling time at check-in	70,0%	38,8%	42,0%	68,2%	68,2%	65,8%
Measurement of waiting time at fast lane security control	95,0%	84,2%	84,0%	98,5%	98,5%	96,0%
Availability of boarding bridges	98,0%	95,2%		96,8%	96,8%	99,6%

# 07 » BRUSSELS AIRPORT TARIFFS

## Brussels Airport's regulated tariffs

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

In 2024, there is a 4% increase in tariffs compared to 2023, primarily due to indexation. The evolution varies depending on the type of fee. There is a 16% increase in LTO fees and a rise in passenger (3%) and security (2.4%) fees. It should also be noted that the figures for 2024, recorded in August, take into account the fuel & oil fees introduced at the end of August, which have an impact on the overall level of each fee category (passenger, LTO, etc.). The shift towards LTO is in line with the formula approved by the regulator.



## Regulated tariffs at reference airports

In general, Brussels Airport's tariffs remain within the average of the reference airports. Brussels Airport has however slightly higher passenger fees compared to most of the reference airports. Security-related fees are lower than most of the reference airports. It should be noted that in the coming years, the tariff structure at Brussels Airport plans a reduction in passenger fees, offset by an increase in LTO fees, which will be clearly visible in 2024.

