

Briefing: Business Aviation in Europe in 2010

1. INTRODUCTION

This briefing describes business aviation flights in Europe in 2010 and the outlook for the next years. It is thus a partial update to *Business Aviation in Europe in 2009*¹ and a synthesis of information which is mostly available on EUROCONTROL's STATFOR interactive dashboard (SID²).

The main points are:

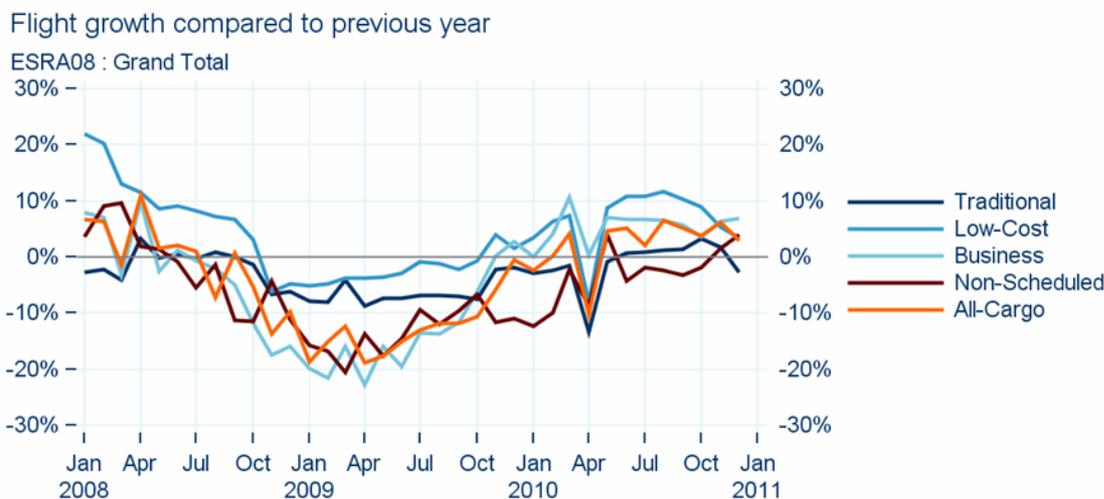
- Business aviation was one of the strongest market segments in 2010, with flights growing by 5.5%.
- The big 3, France, Germany and UK all grew, with Germany growing at 8.1%.
- Turkish internal traffic was the individual flow that added most new business flights.
- The 19-seaters remained the busiest group of aircraft, but the 6-seaters added the most flights.
- In the medium-term we do not expect growth rates to be sustained at pre-crisis levels.

2. TRAFFIC IN 2010

In 2010, aviation in Europe pulled out of the economic downturn and began to climb again. The total number of flights in Europe (ESRA08) in 2010 was 9.5 million, an increase of 0.8% compared to 2009. However, this annual average masks a wide monthly variation, from -11% in the April ash-cloud crisis to +4% in October, at the end of a strong Summer and the start of a weaker Winter.

Growth was driven mainly by low-cost carriers, which saw an increase of 6.9% compared to 2009. Though their growth slowed markedly at the end of the year (Figure 1), their market share climbed 1.3 points compared to 2009, to 22.1% of all flights (**Error! Reference source not found.**). Business aviation also contributed strongly to growth, bouncing back from 2009 with an increase of 5.5%; in particular they showed their flexibility during the ash crisis, being the least affected market segment. Overall, business aviation's share of IFR flights climbed from 6.9% in 2009 to 7.3% in 2010.

Figure 1. Business aviation pulled out of the 2009 slump by the beginning of 2010



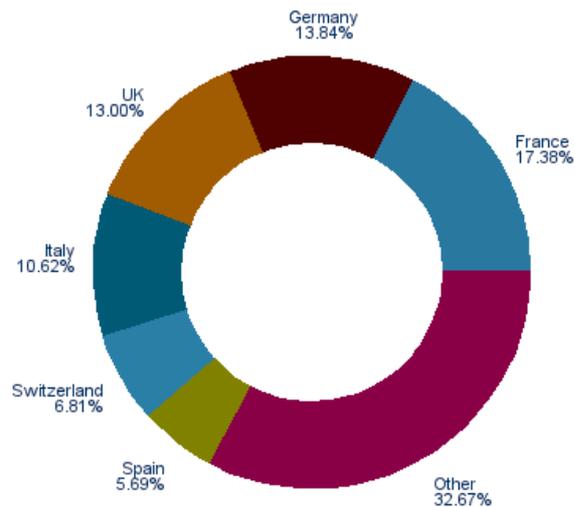
¹ EUROCONTROL *Trends in Air Traffic*, Volume 6, May 2010, www.eurocontrol.int/statfor.

² www.eurocontrol.int/statfor/sid

3. THE MAIN STATES

France and Germany slightly increased their shares of total European business aviation departures in 2010, from 16.9% to 17.4% and from 13% to 13.8% respectively (see TIAT6¹ for the 2009 figures). In particular, Germany grew by 8%, well ahead of the 5.5% average.

Figure 2. States' share of European business aviation departures. France & Germany slightly increased their share of business aviation departures in 2010.



Nice, London/Luton, Zurich and Brussels all saw near 15% growth in business aviation flights. Though Italy increased its share overall, its two main airports were relatively weak, so Nice & London/Luton pushed ahead of Linate and Ciampino into 3rd and 4th place, respectively, behind Le Bourget and Geneva.

4. THE MAIN FLOWS

Figure 3 shows the main flows of business aviation in 2010, between States³ in Europe, or regions outside. France domestic remained the busiest flow (shown as a thick circle). By contrast, the fastest-growing individual flow in 2010 was Turkey-Turkey (Figure 4), with German internals, UK-Switzerland and UK-North Atlantic also strong. It is notable that a number of flows to the Middle East and former CIS were relatively strongly-growing (even in terms of additional flights, not percentages), while still small.

³ State is called 'Traffic Zone' because, for example, Spain is split into two: continental and Canarias.

Figure 3. France-France remained the busiest flow in 2010.

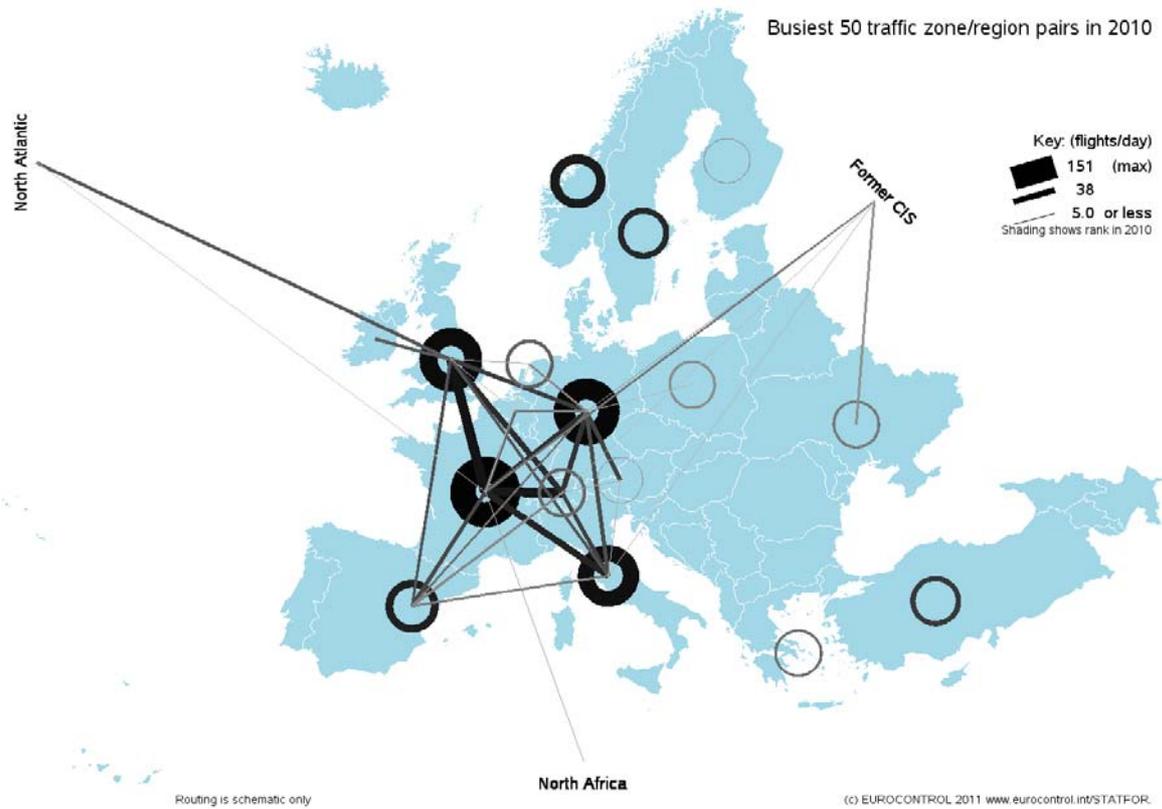
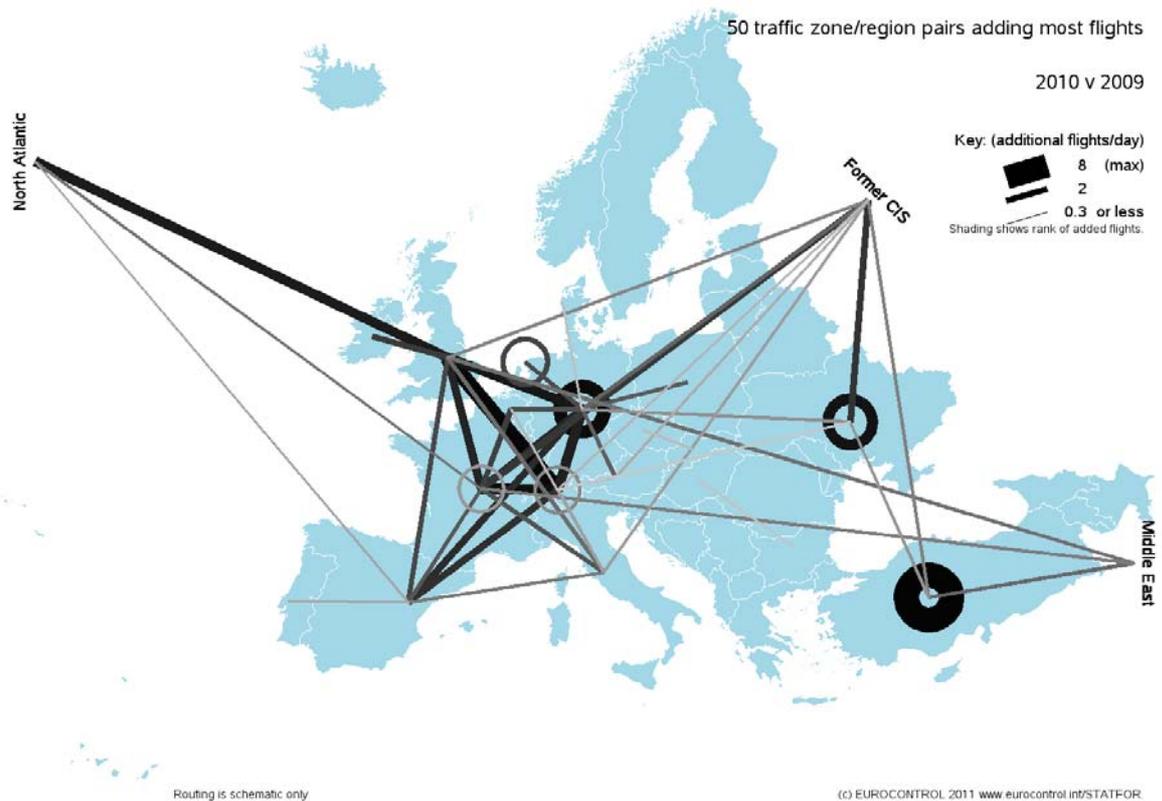


Figure 4. The fastest-growing flow, by contrast, was within Turkey.



5. THE MAIN AIRCRAFT TYPES

Grouped by nominal seat class, it was the 19-seaters which flew most in Europe in 2010 (Figure 5). Top 3 of these were Falcon 2000, Challenger 600 and Falcon 900 all with more than 70 flights/day. The Gulfstream 5 wasn't far behind, close to 60 flights/day, and by growing 12% on the year it drew closer to the top 3.

In fact the fastest-growing seat class was the 6-seater jets (Figure 6). Half of this growth was from the Mustang, with the bulk of the rest of the growth from the Citation CJ3 and Phenom 100.

Figure 5. By nominal seat class, the 19-seaters flew most in Europe in 2010

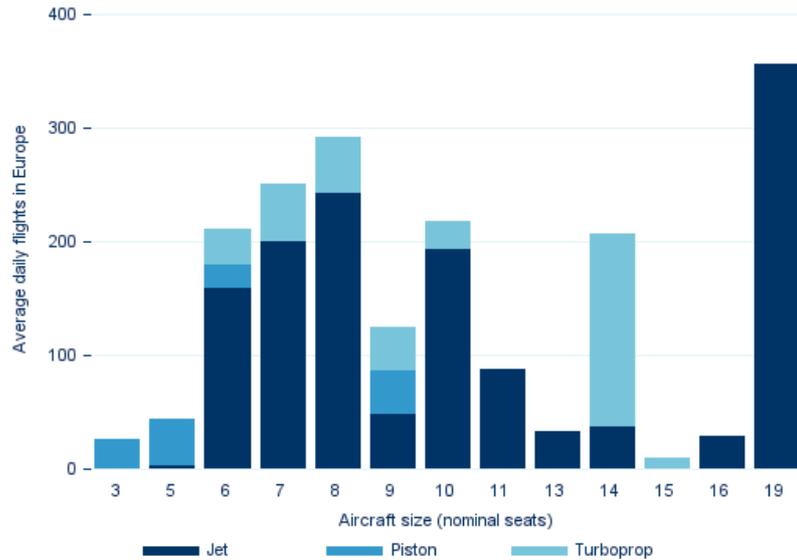
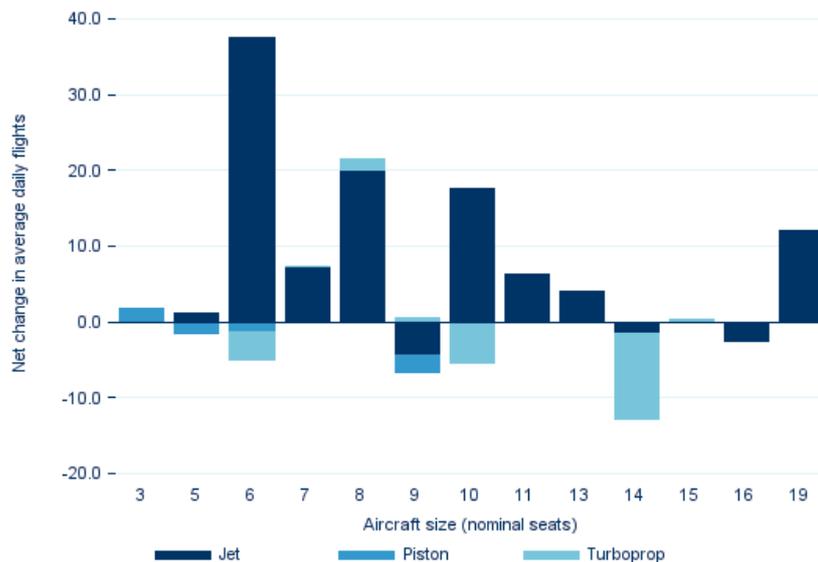


Figure 6. The 6-seater jets added most to overall traffic.



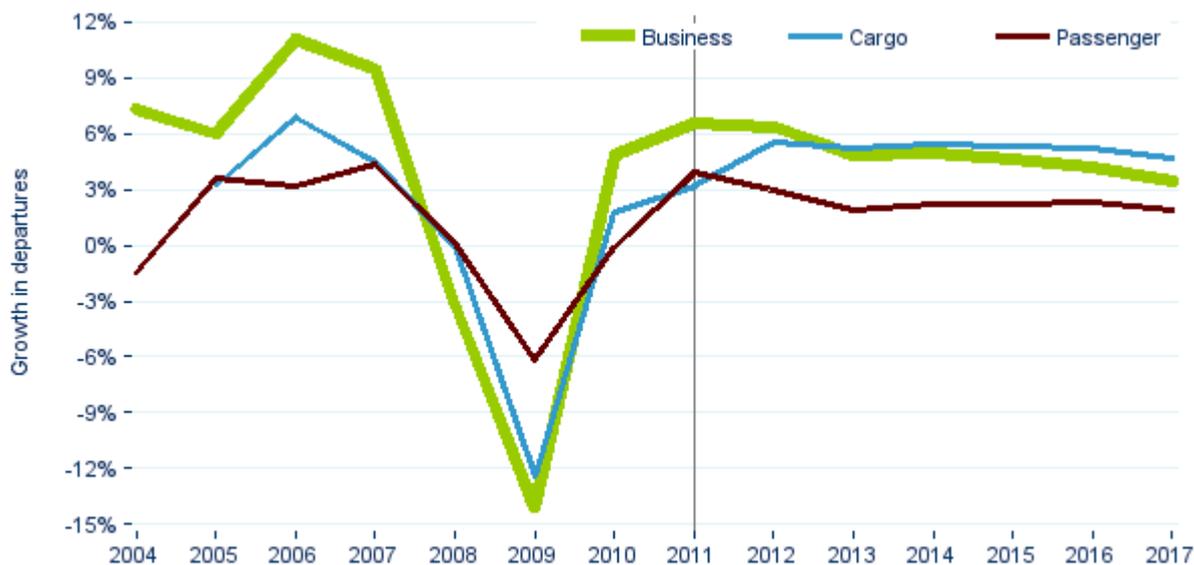
6. 2011 SO FAR

January and February 2011 data are already available. However, both of these months in 2010 were affected by one-off strike and weather events, so growth figures this year are inflated. In this context, it would be premature to take the 7.3% growth year-to-date in 2011 as evidence of an acceleration of last year's 5.5% growth rate.

7. OUTLOOK TO 2015

In developing the most recent EUROCONTROL medium-term forecast⁴, the likely growth of business aviation was forecasted, taking into account past trends and the relationship with economic growth. For the forecast, as in the statistics here, 'business aviation' includes jet and non-jet traffic, and including VLJs. As last year, we see business aviation continuing to grow more quickly than the main scheduled/charter passenger market, particularly for the next couple of years as the market rebuilds itself after the financial crisis. However in the medium-term, with an expectation of economies continuing to be relatively weak, the outlook is not for a return to pre-crisis growth rates.

Figure 7. In the medium-term forecast, growth does not return to pre-crisis levels. (Actual to 2010, forecast from 2011.)



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⁴ EUROCONTROL Medium-Term Forecast, Flight Movements 2011-2017, February 2011. www.eurocontrol.int/statfor.