

PRESS RELEASE

ICCSAI: PASSENGER AIR TRAFFIC ON THE INCREASE, THE INTERCONTINENTAL GAP REMAINS

Air transportation is growing on a European level: Italians are more prone to fly than the French or Germans, which has led to us being ahead of our neighbour on the other side of the Alps, holding fourth place for passenger volume (almost 175 million in 2007), behind Germany (which flew 230 million), Spain (250 million) and the United Kingdom, which holds the lead with 284 million, but which is already seeing the first effects of Brexit. This is what has emerged from the annual report on air transportation in Europe produced by ICCSAI, the International Center for Competitiveness Studies in the Aviation Industry, which was presented at the terminal of Milan Bergamo Airport. What has emerged is a change of direction with respect to the scarce propensity of Italians for intercontinental flights, thanks above all to the opening of new routes from Malpensa. Rome Fiumicino holds ninth place on a European level. In Europe, 85% of airports demonstrate growth in passenger movement. In 2018, growth in Italy has slowed, but remains over 5%. Among the most important airports, 2017 saw the continuation of two-figure growth for Malpensa, Catania, Naples and Bergamo, which in 2018 is in line with the average national growth level, confirming its third place on a national level. Again in 2018, a clear surge ahead for Fiumicino, where non-Schengen traffic has increased by 14%, has been registered. With regards to airlines, the Alitalia group has held on to its 42% of the domestic market, with Ryanair at 30%. For Italy-Europe routes, the Irish airline holds 27.6%, while Alitalia has little more than 22%. The share for the low-cost airline, which peaked at 50% in 2015, has settled at 47.7%, due to an overall reduction in services of 1.5%. Ryanair has a record load factor of 95% and continues to grow in terms of number of routes, as does EasyJet, while Alitalia increases its capacity for long-haul. Airport connectivity sees Fiumicino dropping to 20th place on a European scale, while Malpensa climbs to 25th place. However, both principal Italian airports remain a long way off from the best European indexes. Despite this, Malpensa reaches almost all of the European GDP in 4 hours, followed closely by Fiumicino. On the freight front, the North - which has driven the development of the sector over the last ten years - has shown a slowing-down in 2018, while the centre is growing thanks to the results from Fiumicino. The Southern Italy area has a level of freight traffic which is almost 7% lower than ten years ago. In general, freight traffic has shown the first signs of a worsening of the economic situation in 2018, even though the price of petrol over recent months appears to be following a downwards trend.

UFFICIO STAMPA SACBO

Eugenio Sorrentino
press@sacbo.it
tel. 035326388
Mobile 3358495325



S.A.C.B.O. s.p.a.

www.milanbergamoairport.it

The ICCSAI report, presented by the scientific director Renato Redondi, has led to an analysis and assessment of the future of air transportation, which saw the participation of Ugo De Carolis, the CEO of AdR, Emilio Bellingardi, Director General of SACBO, David O'Brien, the CCO of Ryanair, and Stefano Paleari, the commissioner of Alitalia and the Vice President of ICCSAI. The airport managers called for investment in infrastructure and intermodality, seen as an opportunity for development and in response to diversified business models. It was underlined that it is in the airports that the game between the airlines is played, as punctuality and operational efficiency are determining factors in the achieving of positive results, and the layout of investments by management companies is destined to make an ever-more significant difference. According to David O'Brien, the challenge that awaits the low-cost airlines lies in the ability to combine routes with a project of local development and expansion. Stefano Paleari, the commissioner of Alitalia, underlined how it has been useful and profitable to have been able to optimise the network, above all with regards to long-haul, which has been a more difficult task as it has taken place within a growing market. However, it is a handicap which is destined to cease with the end of the extraordinary administration period for the airline. Picking up on the ideas of Ugo De Carolis and Emilio Bellingardi, Stefano Paleari underlined the need to support access systems such as airports, through which our country should grow in terms of intercontinental travel, considering that for every one hundred Italians flying towards intercontinental destinations, there are another 60 who choose a European hub for their long-haul flights. Lastly, the invitation was made to consider the opportunity for further routes which could lead to a significant increase in the airport network.

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Eugenio Sorrentino
press@sacbo.it
tel. 035326388
Mobile 3358495325



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