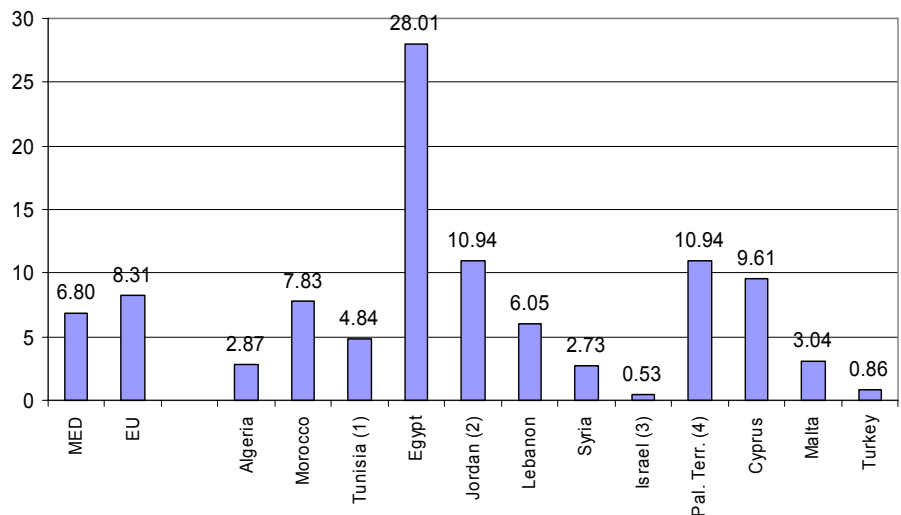


Air Transport in the MED Countries, 1998-2000

The EU is the major air transport partner for the MED region

Vincent Tronet

Figure 1: Annual average growth rate of passenger arrivals and departures (in %)



Note: for footnotes, please refer to those of Table 4.

Highlights

With 54 major airports (having more than 100 000 passengers per year), the MED region serviced in 2000 over 100 million total passengers (arrivals and departures), 1.1 million tonnes of freight and mail and nearly 1 million commercial aircraft landings and takeoffs.

Passenger air transport, highly related to tourism in the MED region, increased by 14% since 1998. Positive trends were registered in all countries, but with average annual growth rates ranging from 28% to 0.5%, the pace of growth is very variable.

International air transport is dominant in MED countries, some of which have a single airport. The list of top-15 airports includes some favourite tourist destinations as well as airports located in the proximity of capital cities.

The average number of passengers travelling on flights to and from the MED countries was 107.5 in 2000. However, some countries in the region were well under this average.

The EU is by far the major aviation partner for most MED countries, and even in countries where it is second to the Near and Middle East region it represents a share of over 22% of the total arrivals and departures (exception: Palestinian Territories).

General Developments

Aviation is mainly a matter of passenger transport and in the Mediterranean region an important part of this activity is related to tourism. The number of tourists visiting the MED countries has been growing at an average annual growth rate of 8.3% in the last two years, increasing from about 28.7 million in 1998 to over 33.6 million in 2000. The share of tourists coming from the EU was as high as 82.5% in Malta and 79.7% in Cyprus and well over 40% in five of the other MED countries. However, the EU tourist presence rated as low as 10.6% in Algeria, 15.2% in Syria, 20.0% in Jordan, and 25.6% in Lebanon, which are typical destinations for visitors coming from the Middle East and Arab countries. Although the development of the cruise industry and ferry traffic plays a role in the islands and in Morocco and Tunisia, most of the tourists travel to MED countries by air.

Statistics in focus

TRANSPORT

THEME 7 – 10/2002

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Table 2: Annual tourist arrivals in the MED countries (in thousands)

Country	1998	1999	2000	Aver.ann. growth %
Algeria (DZ) (1)	678	749	866	13.02%
Morocco (MA)	3 095	3 817	4 113	15.28%
Tunisia (TN) (1) (2)	4 718	4 832	5 058	3.54%
Egypt (EG) (1) (3)	3 454	4 797	5 506	26.26%
Jordan (JO)	1 256	1 358	1 427	6.59%
Lebanon (LB) (1) (4)	600	673	742	11.21%
Syria (SY)	890	916	:	:
Israel (IL)	1 942	2 312	2 417	11.56%
Palestinian Territories (PS)	:	:	:	:
Cyprus (CY)	2 223	2 434	2 686	9.92%
Malta (MT)	1 182	1 214	1 216	1.43%
Turkey (TR)	8 638	6 893	9 586	5.34%
Total MED region	28 676	29 995	33 617	8.27%

Source: EUROSTAT, Euro-Mediterranean Bulletin 2001, 1

(1) Arrivals of visitors

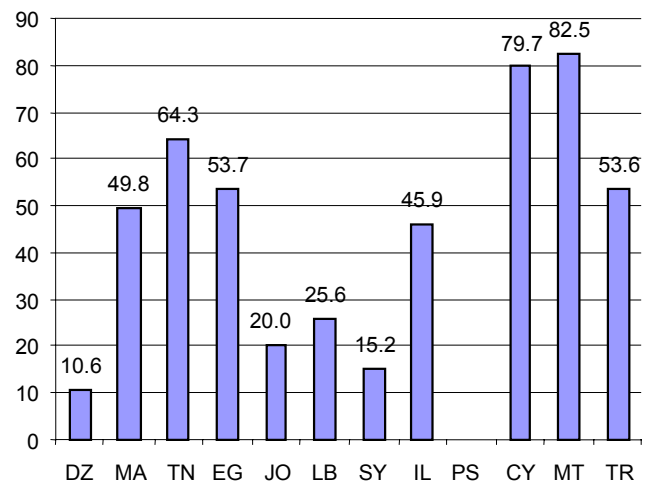
(2) Excluding Tunisians residing abroad

(3) Arrivals of foreign visitors (=tourists+same day visitors)

(4) Lebanese and Syrians are excluded

The MED region features 54 major airports serving over 100 thousand passengers per year. The overall passenger turnover in these countries reached a total of 101.1 million (arrivals and departures) in 2000, increasing by 14% since 1998. Positive trends were registered in all countries between 1998 and 2000. Average annual increase rates were very high in Egypt (more than 28%) but also in Jordan (10.9%) and Cyprus (9.6%), while a much slower growth was registered in Israel (0.5%) and Turkey (0.9%). The average annual growth rate for the MED region as a

Figure 3: Percentage of tourists coming from the EU to Mediterranean countries, 2000



Note: for SY, 1999 data

whole was about 6.7%, as compared to the 8.3% of the EU. The major airports throughout the region also handled a global amount of about 1 132 thousand tonnes of freight and mail and saw nearly 1 million commercial aircraft landings and takeoffs. The tonnage of freight and mail increased by 17.9% between 1998 and 2000, but this was not sustained by positive growth in all countries. The average annual growth rates experienced in Morocco (-5.1%), Algeria (-4.7%), Cyprus (-3%) and Jordan (-0.2%) showed a drop.

Table 4: Passenger and freight transport at the major airports of the MED countries, 1998-2000

Country	Number of passengers				Tonnes of freight and mail				Commercial aircraft movements (take-offs and landings)			Average number of pass. per flight* 2000		
	Arrivals and departures (A+D)			Direct transit	Average annual growth			Average annual growth %	1998	1999	2000			
	1998	1999	2000		%	in 2000	2000							
Algeria (DZ)	5 619 628	5 438 625	5 946 647	2.87	66 583	1.12	23 980	24 148	21 788	-4.68	70 324	77 029	98 255	62
Morocco (MA)	5 965 423	6 602 476	6 935 814	7.83	133 351	1.92	30 934	27 435	27 835	-5.14	88 231	89 470	97 376	74
Tunisia (TN) (1)	8 653 578	9 132 645	9 511 308	4.84	135 052	1.42	49 171	52 310	51 522	2.36	86 121	112 064	91 035	104
Egypt (EG)	11 528 570	16 236 094	18 892 479	28.01	580 735	3.07	150 354	162 566	188 782	12.05	141 420	168 288	187 101	107
Jordan (JO) (2)	2 081 514	2 415 065	2 561 796	10.94	23 742	0.93	85 990	77 453	85 620	-0.22	26 133	30 660	:	80
Lebanon (LB)	1 995 911	2 110 656	2 244 788	6.05	98 599	4.39	54 300	52 439	59 243	4.45	25 010	27 878	29 707	82
Syria (SY)	1 827 344	1 907 495	1 928 560	2.73	116 556	6.04	30 491	30 721	30 745	0.42	26 642	28 561	31 553	69
Israel (IL) (3)	9 507 700	9 862 834	9 607 900	0.53	:	:	285 900	303 052	342 799	9.50	27 987	30 933	33 369	288
Pal. Terr. (PS) (4)	2 281	79 328	88 009	10.94	-	-	-	104	245	135.49	:	2 028	2 128	41
Cyprus (CY)	5 091 940	5 543 794	6 117 768	9.61	221 663	3.62	35 614	32 986	33 473	-3.05	47 174	45 559	48 705	135
Malta (MT)	2 743 234	2 882 351	2 912 746	3.04	38 293	1.31	11 989	12 489	13 699	6.89	26 530	27 945	29 186	102
Turkey (TR)	33 738 796	29 264 928	34 322 256	0.86	1 589 961	4.63	202 297	235 068	276 166	16.84	327 204	306 948	318 340	118
MED	88 755 919	91 476 291	101 070 071	6.71	3 004 535	2.97	961 020	1 010 771	1 131 917	8.53	892 776	947 363	997 415	107
EU	369 896 409	399 230 666	433 888 942	8.31%										

(1) 2000 data preliminary

(2) Average number of passengers per flight calculated on 1999 data but taking into consideration direct transit for 2000

(3) 2000 data for Israel refers only to international figures

(4) Gaza Intl Airport was inaugurated in November 1998. The average annual growth rate was calculated only for 1999-2000

* The average number of passengers per flight is calculated as the total number of passengers (including direct transit) divided by the number of flights

Table 5: Share of the largest airport in total passenger volume and number of major airports - 2000

Country	Name major airport	Total pass. in country (including direct transit)	Pass. at major airport	Share of pass. at major airport in %	number of airports over 100.000 pass.
Algeria (DZ)	Alger/Houari Boumediene	6 013 230	2 777 108	46.18	10
Morocco (MA)	Casablanca/Mohamed V	7 069 165	3 533 770	49.99	7
Tunisia (TN) *	Monastir/Habib Bourghiba	9 646 360	3 916 988	40.61	4
Egypt (EG)	Cairo Intl Airport	19 498 265	8 777 539	45.02	7
Jordan (JO)	Amman Queen Alia Intl	2 585 538	2 386 514	92.30	2
Lebanon (LB)	Beirut Intl Airport	2 343 387	2 343 387	100.00	1
Syria (SY)	Damascus Intl Airport	2 045 116	1 688 436	82.56	2
Israel (IL) **	Ben Gurion/Tel Aviv	9 862 834	8 423 041	85.40	4
Palestinian Territories (PS)	Gaza Intl Airport	88 009	88 009	100.00	-
Cyprus (CY)	Larnaca	6 339 431	4 957 574	78.20	2
Malta (MT)	Malta Intl Airport	2 951 039	2 951 039	100.00	1
Turkey (TR)	Istanbul/Ataturk	35 912 217	15 969 009	44.47	14
MED		104 354 591	57 812 414	55.40	54

* 2000 data preliminary ** 1999 data

Table 6: Top-15 airports in terms of passenger transport in the MED and in the EU and EFTA countries, 2000

No.	MED Airports	Number of passengers (arrivals + departures)	EU and EFTA Airports	Number of passengers (arrivals + departures)
1	ISTANBUL/ATATURK (TR)	14 647 810	LONDON HEATHROW (UK)	56 885 371
2	TEL-AVIV/D. BEN GURION (IL)	9 281 200	AIRPORT SYSTEM PARIS (FR)	49 078 124
3	CAIRO/INTL (EG)	8 640 909	FRANKFURT MAIN (D)	40 281 807
4	ANTALYA (TR)	7 456 658	AMSTERDAM SCHIPHOL (NL)	39 099 046
5	LARNACA (CY)	4 738 575	LONDON GATWICK (UK)	29 040 267
6	ANKARA/ESENBAGA (TR)	4 027 928	BRUXELLES NATIONAL (B)	21 586 961
7	MONASTIR/HABIB BOURGIBA (TN)	3 916 988	ZURICH (CH)	21 192 341
8	CASABLANCA/MOHAMED V (MA)	3 511 130	MADRID BARAJAS (ES)	16 086 783
9	TUNIS/CARTHAGE (TN)	3 375 701	MANCHESTER (UK)	15 459 702
10	MALTA/LUQA (MT)	2 912 746	MILANO MALPENSA (IT)	15 014 164
11	ALGER/HOUARI BOUMEDIENE (DZ)	2 777 108	MUNCHEN (DE)	14 600 358
12	HURGHADA (EG)	2 641 745	PALMA DE MALLORCA (ES)	14 450 822
13	IZMIR/ADNAN MENDERES (TR)	2 507 389	ROMA FIUMICINO (IT)	13 387 428
14	AMMAN/QUEEN ALIA (JO)	2 386 514	DUBLIN (EI)	12 995 880
15	BEIRUT/INTL (LB)	2 244 788	DUSSELDORF (D)	11 993 774

The busiest airports in the MED region

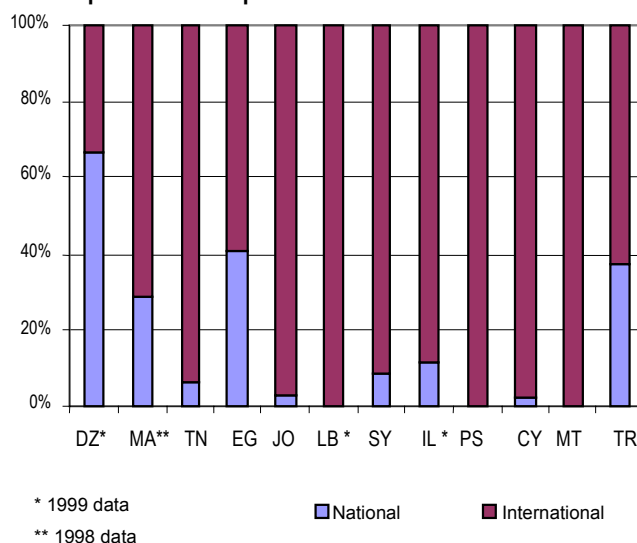
With close to 36 million passengers (including direct transit) in 2000 Turkish airports account alone for close to one third of total MED air transport. Egypt follows with 19.5 million passengers, and Israel and Tunisia both close to 10 million. The 15 busiest airports reflect a great disparity in the volumes handled in the region, ranging from the top performance of Istanbul/Ataturk with about 14.6 million passenger arrivals and departures to the 2.2 million passengers at Beirut International. The list features four Turkish airports and two Egyptian airports. Apart from airports located in proximity to capital cities in each country, the top-15

list includes favourite MED holiday destinations such as Antalya (7.5 million passengers) and Hurghada (2.6 million). These numbers are relatively small if compared to some major EU air hubs, such as London/Heathrow (57 million passengers), the Paris airport system (49 million), Frankfurt and Amsterdam/Schiphol (both around 40 million). However, in an EU-MED ranking, Istanbul/Ataturk would compete with München for the 11th position, and Tel Aviv/Ben Gurion with Barcelona and Athens for the 20th position.

National and international transport

Throughout the MED region (except for Algeria) domestic air transport is notably less significant than international transport and, in several countries, it is practically non-existent. This is straightforward in smaller countries with a single airport such as Lebanon, Malta and the Palestinian Territories, but the share of domestic passengers is negligible also in Cyprus (2.3%), Jordan (2.9%), Tunisia (6.1%) and Syria (8.6%). Notable exceptions are Algeria, Turkey, and Egypt where respectively 66.5%, 43% and 41% of the passenger arrivals and departures were domestic. The number of direct transit passengers is also negligible in the MED airports. They usually represent well under 4% of the total number of passenger arrivals and departures. Syria stands out with 6% which are due to international flights operated by the Syrian Arab Airlines from/to Damascus through Aleppo airport.

Figure 7: Share of national and international passenger transport in MED airports

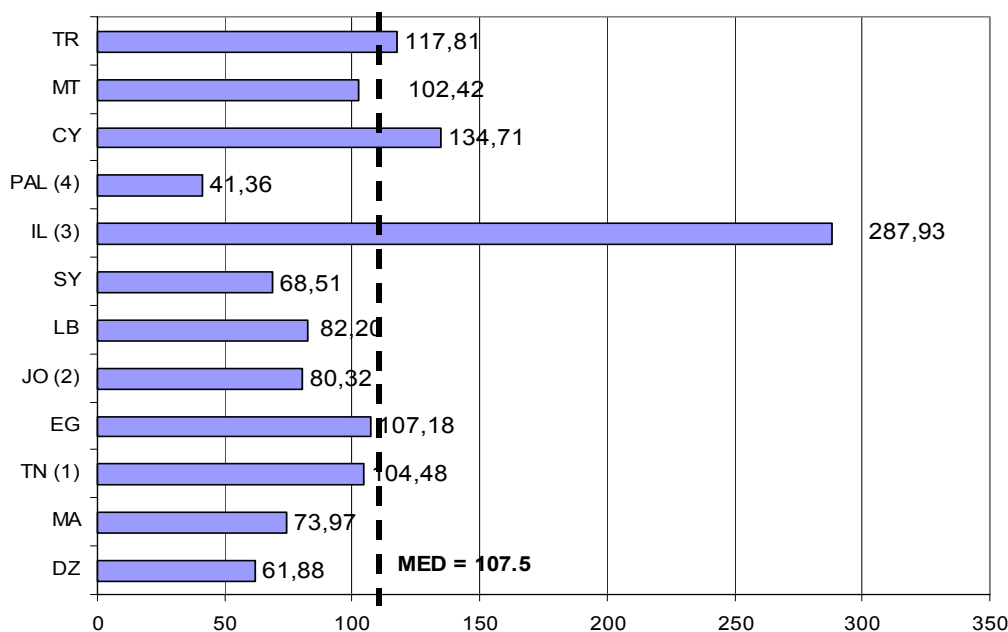


Average number of passengers per flight

The average number of passengers per flight travelling to and from the MED countries was 107.5 in 2000. However, some countries in the region rated well under this average, depending on the types and sizes of the aircraft used, but also on their occupancy rate. Flights to/from Gaza International Airport carried on average 41 passengers and those connecting with

Algeria about 62. Performances within the range of 68 to 82 passengers were shown for Morocco, Jordan, Lebanon and Syria. Israel clearly outperformed all other countries with an average of 288 passengers per flight, more than twice as much as the number travelling on average on a flight to/from Cyprus.

Figure 8: Average number of passengers carried per flight



Note: for footnotes please refer to those of Table 4.

Passenger transport by geographical areas

The countries of the European Union constitute by far the major aviation partners for most of the MED countries. In 2000 over 7.5 million passengers flew between the EU and Tunisia, representing about 77.5% of the total number of arrivals and departures from Tunisian airports. The EU is the largest partner also for Malta (83.4%), Cyprus (73.8%) and Israel (52.2%), and, although second to the Near and Middle East region, it still represents an important share for Lebanon (31%), Jordan (30%) and Syria (22%). Inter-continental air relations with America stand out as an important category for Israel (18.2%) but they are weak or non-existent for the other MED countries. Travel by air to/from Africa (mainly North Africa)

represents up to 19% in the case of Gaza International Airport, 14% for Syria, 13% for Jordan and more than 9% for Lebanon and Tunisia.

The pattern of regional relations mentioned above is reflected in each country's major passenger routes. Countries where air links with the EU are privileged have Paris, Athens, and London as the partner airports of their leading routes, while countries with stronger ties in the Near and Middle East feature within their most important destinations Jeddah, Dubai and Kuwait. The major passenger route in Israel stands out from this picture with 763 thousand passengers flying between Tel Aviv/Ben Gurion and New York/John F. Kennedy airport.

Table 9: Passenger transport by area of geographical destination in 2000

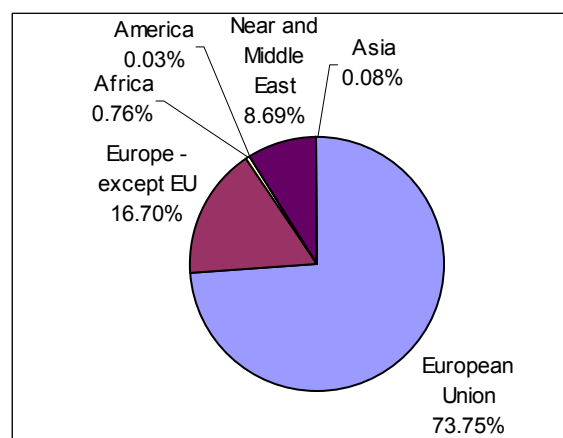
Geographical destination	TOTAL 8 MED COUNTRIES	CYPRUS	JORDAN	MALTA	PAL. TERR.	SYRIA *	TUNISIA	ISRAEL **	LEBANON **
European Union	20.887.276	4.736.741	750.518	2.428.556	0	419.110	7.476.980	4.393.274	682.097
Europe - except EU	4.879.678	1.072.350	157.764	221.499	4.274	196.593	941.148	1.985.601	300.449
Africa	2.262.644	48.583	324.798	217.489	16.695	265.338	930.075	239.281	220.385
America	1.647.810	1.980	114.065	54	0	0	145	1.531.566	0
Near and Middle East	3.582.708	558.247	969.325	43.437	67.040	959.702	189.747	43.586	751.624
Asia	506.618	4.821	193.617	0	0	36.518	0	229.114	42.548
Unknown	360.401	44	0	0	0	26.232	108.265	619	225.241
TOTAL	34.127.135	6.422.766	2.510.087	2.911.035	88.009	1.903.493	9.646.360	8.423.041	2.222.344

* Only the major airports (Damascus and Aleppo).

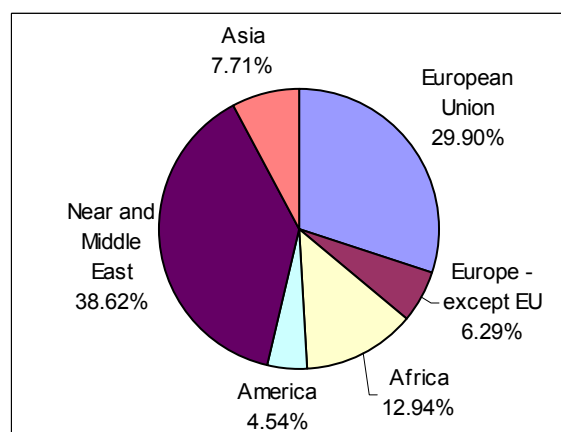
** 1999 data for Israel (only Ben Gurion international traffic) and for Lebanon.

Figures 10: Passenger transport by area of geographical destination

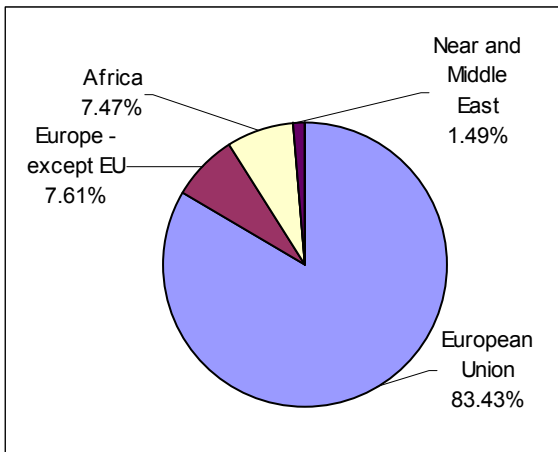
Cyprus



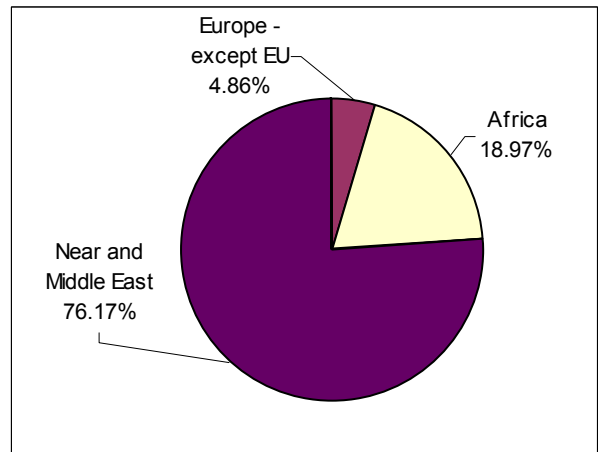
Jordan



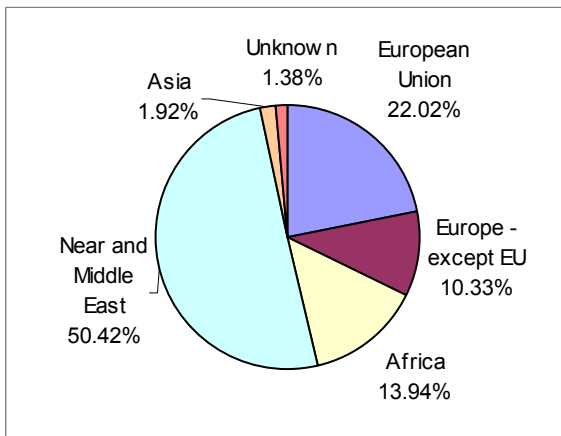
Malta



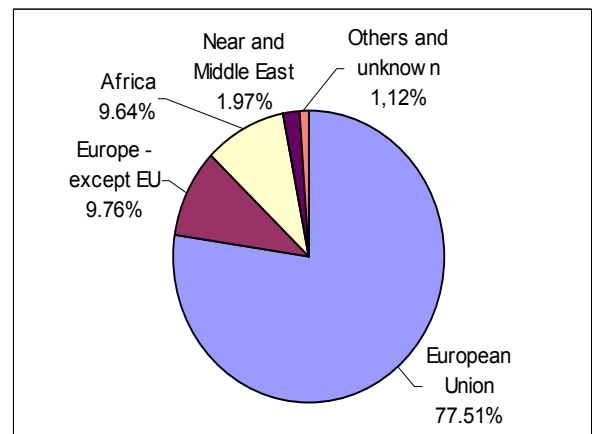
Palestinian Territories



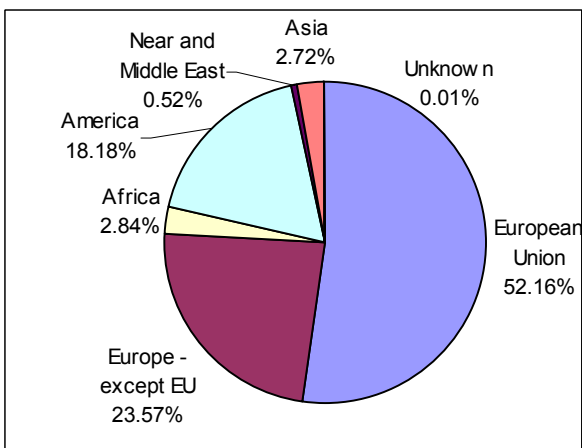
Syria



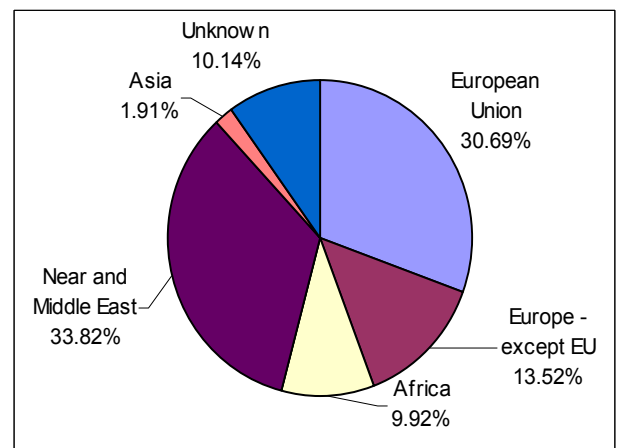
Tunisia



Israel



Lebanon



► DEFINITIONS AND METHODOLOGICAL ISSUES

Table 2, 5 and 6 were extracted from the *Airport dataset*, which reports the number of passengers, tonnes of freight and mail and number of flight movements in main MED airports.

Direct transit passengers are passengers who continue their journey on a flight having the same flight number as the flight on which they arrived

Table 9 is based on more detailed data concerning airport-to-airport pairs according to the *Flight Stage dataset* for Cyprus, Malta, Lebanon, Israel, Tunisia and Gaza International airport and to the *On Flight Origin/Destination dataset* for Jordan and Syria.

In the *flight stage dataset* the number of passengers is the number of passengers on board of the flight in arrival or in departure from the reporting airport with reference to next and previous airport; while in the *on flight origin/destination database* the number of passengers is reported on a given flight with the same flight number subdivided by airport pairs in accordance with point of embarkation and point of disembarkation on that flight.

The difference between the flight stage database and the on flight origin/destination database can be illustrated by the following example. Consider passengers travelling on a flight operated between airports A, B, and C. Airport A will report 320 passengers on board to airport B for the flight stage database, but it will report 140 passengers carried to B and 180 passengers carried to C for the on flight origin/destination database. Airport B will report 320 passengers on board from A and 240 passengers on board to C for the flight stage database, but it will report 140 passengers carried from A and 60 passengers carried to C for the on flight origin/destination database. Airport C will report 240 passengers on board from B for the flight stage database, but 180 passengers carried from A and 60 passengers carried from B for the on flight origin/destination database.

In the case of most MED countries, where the number of direct transit passengers is very small, the difference between the flight stage and origin/destination declarations is usually not significant.

Data from the MED countries includes domestic transport (although generally very limited) unless stated otherwise. The EU data does not cover domestic transport.

In this publication:

DZ = Algeria

MA = Morocco

TN = Tunisia

EG = Egypt

JO = Jordan

LB = Lebanon

SY = Syria

IL = Israel

PS = Palestinian Territories

CY = Cyprus

MT = Malta

TR = Turkey

*Data, figures and text with the assistance of
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