Monthly Traffic Results
Frankfurt Airport

with Annual Report

December 2019

Traffic category	December absolute	Δ%	January to December absolute	Δ%
Passengers (arr.+dep.+transit)	4,868,689	-1.2%	70,560,987	1.5%
Airfreight (metric tons) (arr.+dep.+tr.)	161,474	-7.3%	2,041,775	-3.9%
Airmail (metric tons) (arr.+dep.+tr.)	8,910	-5.6%	86,701	-3.8%
Aircraft Movements (arr.+dep.)	36,635	-4.4%	513,912	0.4%
MTOWs (metric tons) (arr.)	2,370,398	-2.9%	31,872,251	0.8%
Traffic Units (arr.+dep.+tr.)*	6,572,529	-2.8%	91,845,745	0.2%
Traffic Units (arr.+dep.)**	6,538,054	-2.8%	91,372,384	0.2%
Cargo (metric tons) (arr.+dep.+tr.)	170,384	-7.2%	2,128,476	-3.9%

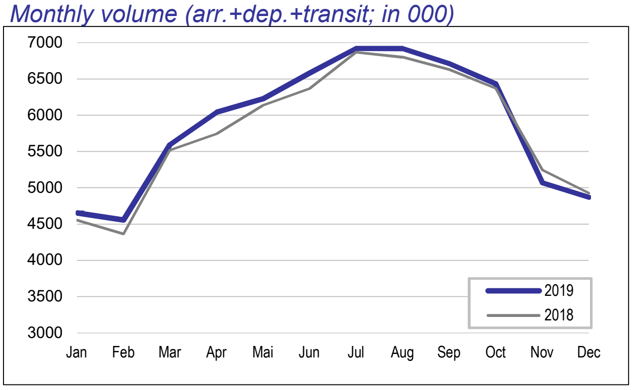
Traffic Units (TU) are the combined annual values of passengers, cargo, and mail expressed in metric tons.
1 TU = 1 Pax (assessed at 100 kg), or 100 kg of freight or 100 kg of mail.
Cargo refers to the sum of airfreight and airmail volumes, all in metric tons.
However, due to measuring airfreight and airmail in kilograms, rounding diffrences may appear.
* Fraport internal definition: arriving+departing+transit
** As per ADV-definition: arriving+departing.

Prepared by UEW-MF, 16.01.2020

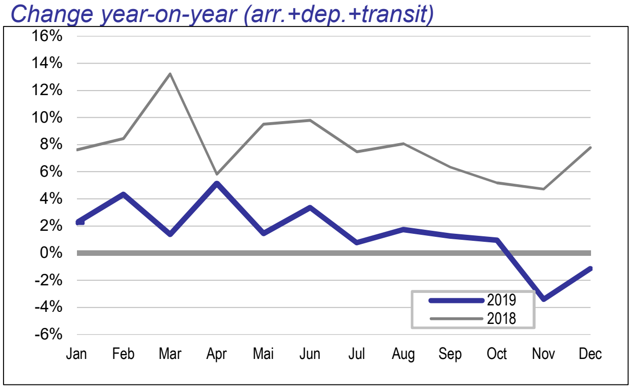
Passengers

December	**4,868,689**	**-1.2%**
January to December	**70,560,987**	**1.5%**

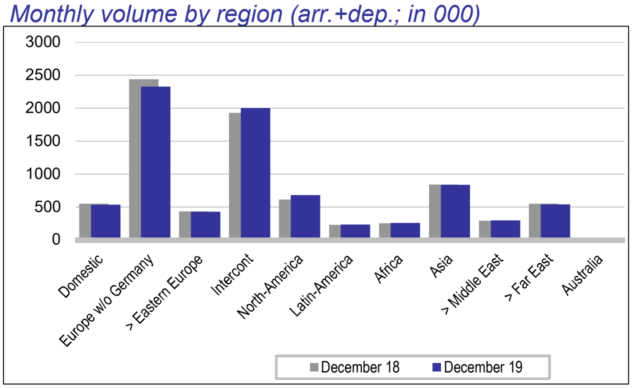
Monthly volume (arr.+dep.+transit; in 000)



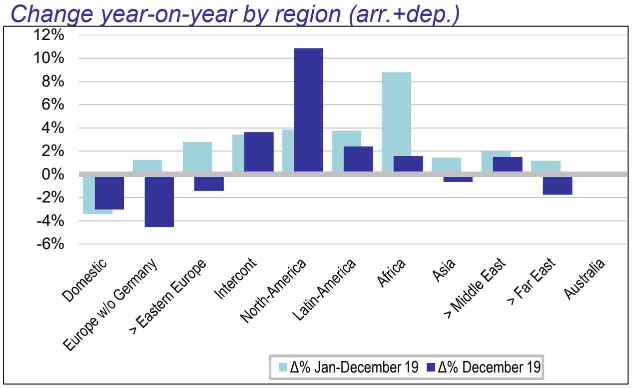
Change year-on-year (arr.+dep.+transit)



Monthly volume by region (arr.+dep.; in 000)



Change year-on-year by region (arr.+dep.)



Regional evaluation by destination; source: BIAF-MAFO

In December 2019 the trend of a weakening demand continued. The passenger count was down again in the second month of the winter season 2019/2020. In comparison to 2018 there were about 57,000 less passengers (-1.2 %) arriving at or departing from Frankfurt Airport. Nonetheless, the passenger count in December 2019 was the second highest count for a December month in the history of Frankfurt Airport.

The reason for this is primarily based on an extensive reduction of offered passenger services (flights) to and from domestic and European destinations at the start of the winter season. This has to do with the weakening of the economy and general consolidation of offered passenger services (flights) on the part of the airlines. Consequently, there were 3 % fewer passengers on the high business travel domestic routes. This was noticed most of all concerning traffic to and from Munich and Berlin. There was usually growth connected to travel to and from other medium-size airports in Germany despite fewer aircraft movements.

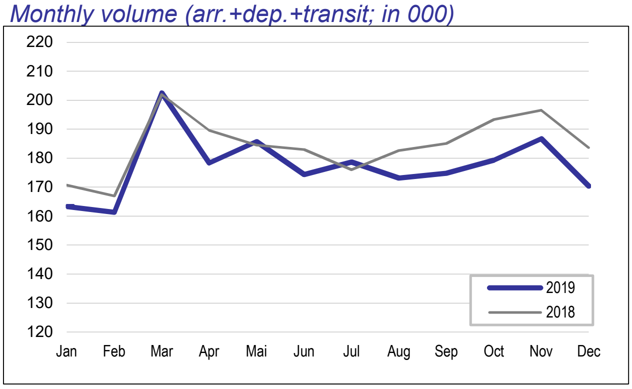
European traffic recorded an even higher decline (-4.5 %). Southern Europe lost a high number of passengers evidently to vacation spots outside Europe. Due to the reduction of offered passenger services (flights) the Balearic Islands lost about one-third of their passengers. There was also noticeable decline of travel to and from destinations in Northern Europe. Iceland lost a big number of passengers due to WOW Air having left the market.

Intercontinental traffic increased once again with high dynamics (+3.7 %). This is based on more offered passenger services (flights) to and from destinations in the USA and Caribbean region. In addition to the Caribbean region there was also a remarkable growth rate connected to Egypt. Far East traffic was on the decline. This was mainly due to the discontinuation of the connection with Osaka in Japan. There was a growth rate for Middle East traffic. However, the dynamics of this growth slowed down somewhat.

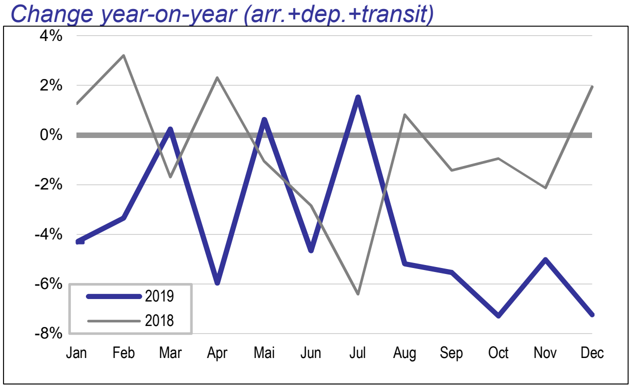
Cargo (t)

December	**170,384**	**-7.2%**
January to December	**2,128,476**	**-3.9%**

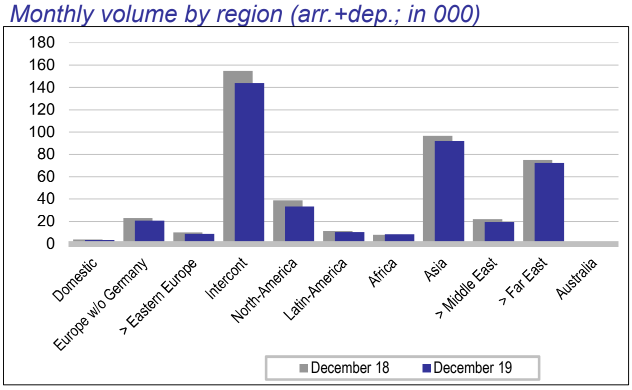
Monthly volume (arr.+dep.+transit; in 000)



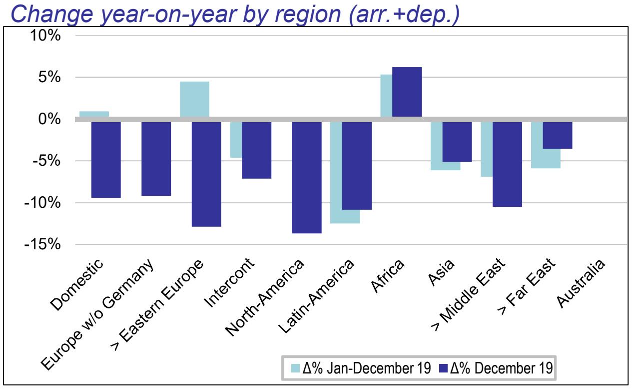
Change year-on-year (arr.+dep.+transit)



Monthly volume by region (arr.+dep.; in 000)



Change year-on-year by region (arr.+dep.)



Regional evaluation by destination; source: BIAF-MAFO

In December 2019 air cargo traffic declined significantly to about 170,400 mt (-7.2 %). This was the lowest December count since the worldwide finance crisis about ten years ago. Compared to December 2018, there was one less high-volume Saturday and one more low-volume Tuesday. This had an additional negative impact of about 1.2 percentage points on the December 2019 result.

The situation of the economy remains difficult. The industries in the euro zone and specifically Germany felt the declining demand and recorded the highest drop of the order count since seven years. This impacted the continuously weak utilization of cargo capacities at Frankfurt Airport even though having already been reduced in December.

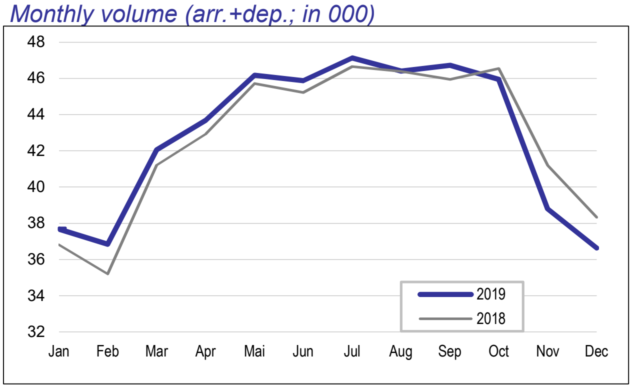
Of the Top 10 countries only India, Hong Kong and Turkey recorded slight growth rates. Regarding China about the same tonnage was recorded as in 2018. Other direct routes (among others USA -14.4 %) had to accept substantial decline rates.

Regarding the relatively small markets there were increases for tonnage connected to Egypt (+32.6 %), Chile (+106.5 %) and Vietnam (+24.0 %) as a market with a promising future. Regarding Egypt the expansion of freighter aircraft capacities and belly capacities had a positive impact. Compared to 2018 the freighter aircraft capacities for Santiago de Chile (SCL) and Vietnam expanded noticeably.

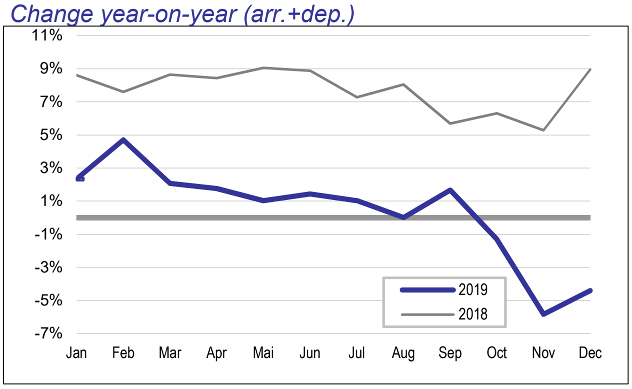
Aircraft Movements

December	**36,635**	**-4.4%**
January to December	**513,912**	**0.4%**

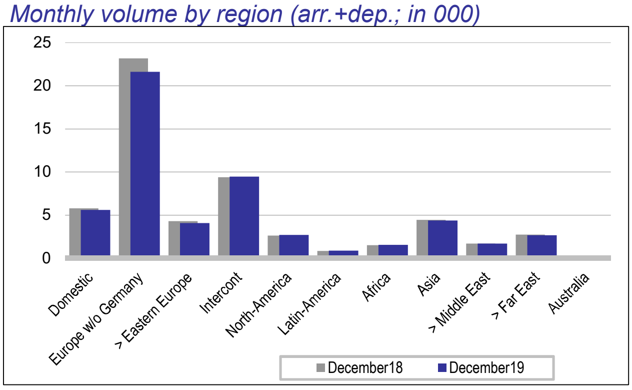
Monthly volume (arr.+dep.; in 000)



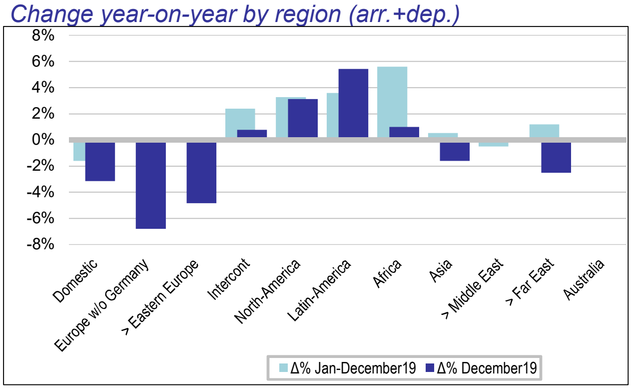
Change year-on-year (arr.+dep.)



Monthly volume by region (arr.+dep.; in 000)



Change year-on-year by region (arr.+dep.)



Regional evaluation by previous/next en-route stop; source: BIAF-MAFO

In December 2019 there were 4.4 % fewer aircraft movements (takeoffs and landings) compared to December 2018. The count in December 2019 was 36,635. About 1,700 aircraft movements were missing to achieve the record count for a December month established in December 2011. Last year only 2 movements were missing to achieve a new record for that month.

Flights to and from other airports in Germany were down by 2.8 % in December 2019 and thus less than the total passenger flights. Remaining European traffic was down by even 7.1 %. Traffic in December 2019 declined to and from all regions. The highest drop was connected to Spain, followed by Italy, Portugal, United Kingdom and Sweden. Growth was seen for only a few countries including Turkey and the Netherlands.

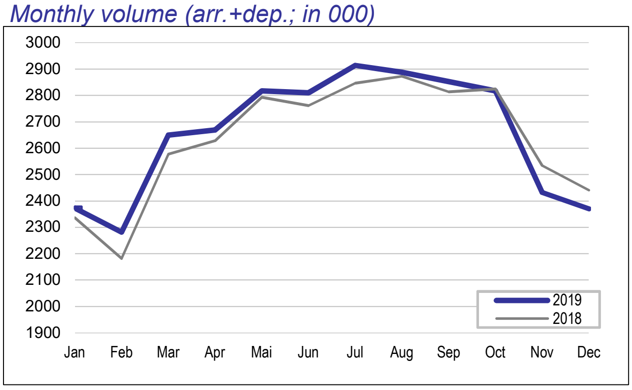
Intercontinental passenger flights were up by 1.5 % in December 2019. America was the growth generator. Offered passenger services (flights) to and from the USA were up by 7.8 % compared to December 2018. In addition, new connections to destinations in Middle America effected a growth of 11.6 %. Flights to and from Africa stagnated because the growth rate for South and North Africa was offset by declines connected to Central Africa. Asia continued on its negative trend (-1.7 %) compared to December 2018. The main reason for this is the discontinuation of the connection to and from Osaka, Japan.

Freighter aircraft flights were down by 3.4 % in December 2019. European freighter aircraft traffic was up by 2.8 % whereas the intercontinental connections were down by 4.7 %. Despite expanded services for Mexico the services for America were significantly lower compared to December 2018. The Asian freighter aircraft connections were also down in December 2019.

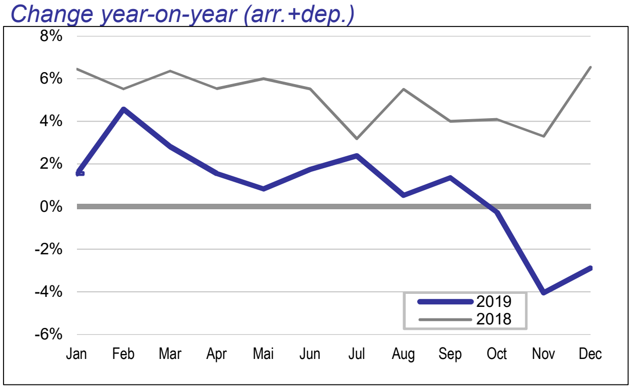
Maximum Take Off Weights / MTOW (t)

December	**2,370,398**	**-2.9%**
January to December	**31,872,251**	**0.8%**

Monthly volume (arr.+dep.; in 000)



Change year-on-year (arr.+dep.)



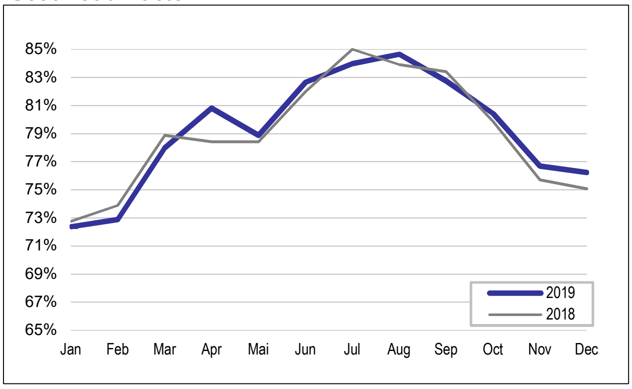
In December 2019 MTOWs were at about 2.37 million tons and 2.9 % below the count for December 2018. This count is roughly 70,000 tons below the record count in December 2018.

In December 2019 the MTOWs developed below average compared to aircraft movements. The increase of the number of intercontinental flights was responsible for this. The average MTOW per aircraft landing climbed to 129.0 t. The growth of the passenger count in December 2019 clearly exceeded the increase of offered passenger services by the airlines. Consequently, the seat load factor increased by 1.2 percentage points to a count of 76.2 %. The quotient passengers per passenger aircraft movement climbed to 142.4.

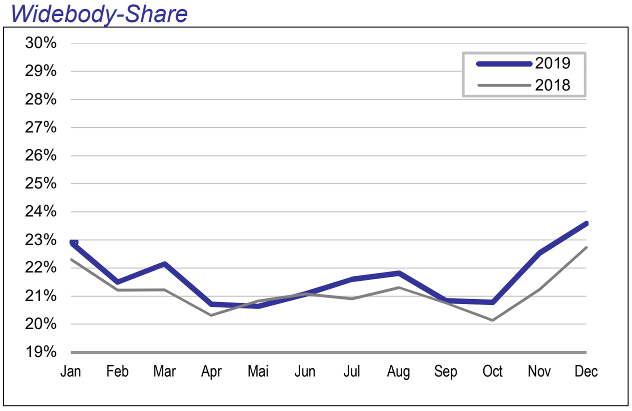
Special Information

The seat load factor in December 2019 was at 76.2% versus 75.1% in the same month last year.
The share of widebody aircraft was at 23.6% (December 18: 22.7%).
The ratio 'passengers per passengerflight (sheduled & charter)' was at 142.4 vs. 137.6 in the same month last year.
Compared to the same month last year the flight punctuality rate increased by 6.1%-points and was at 75.0%.

Seat Load Factor



Widebody-Share



Passengers

January to December **70,560,987** **1.5%**

The passenger count surpassed 70 million for the first time in the history of Frankfurt Airport. With above 70.5 million passengers there were 1 million more passengers than in 2018. Demand slowed down somewhat due to the weakening of the economy. During the first six months of 2019 growth was up by 3 percent. During the second half of 2019 the passenger count stagnated (+0.2 %).

As result of reduced offered passenger services (flights) at the beginning of the winter season the passenger count even declined by 1.1 % during the last quarter of 2019. Consequently, no more passenger records were set in November and December for a single month. This had been the case for every month since December 2016. Nonetheless, there were more days in 2019 with a passenger count above 200,000. The 200,000 mark was surpassed on every other day of the year.

Furthermore, for the first time the passenger count exceeded 240,000 on two days in 2019. A new record for a single day was set on June 30, 2019, with 241,228 passengers. Flight cancellations due to strikes and bad weather conditions negatively impacted demand and, consequently, growth dynamics. Without the cancellations affecting approximately 400,000 passengers the growth rate at the end of the year would have been 0.6 percentage points higher and at 2.1 %.

During the year the airlines consolidated their offered passenger services (flights). Subsequent timetable adjustments weakened both domestic and European traffic. Airlines having left the market additionally caused a reduction of offered passenger services (flights) to and from European destinations. However, this was contrasted by the significant increase of the number of flights connected to intercontinental traffic (USA, Caribbean region, North Africa).

During the year there was a noticeable decline of demand for travel to and from other German destinations. Germany recorded a decline of 3.4 %. All connections inside Germany lost passengers with the exception of Paderborn. Berlin, as the connection with the highest passenger volume, experienced a drop in demand before the reduction of offered passenger services (flights) at the start of the winter timetable 2019/20 due to a reduction of offered passenger services already at the beginning of the year.

During the last quarter demand also fell in connection with European traffic which until then had experienced above average growth rates. There was a reduction of offered passenger services (flights) at the beginning of the winter season leading to a lower passenger count towards the end of the year. Noticeable growth during the entire year was only seen for the Southeast Europe region. Greece and especially Turkey profited from the return of German tourists. As a result, traffic to and from South Europe stagnated.

North Europe was the only European traffic region that experienced a decline. This was mainly due to Wow Air having left the market. Due to the weak demand for travel to and from Great Britain and a decline of travel on all connections to and from Austria, there was only below average growth of traffic connected to West Europe which is a high passenger volume market.

After a relatively long weakness phase intercontinental traffic was once again the main growth generator. Growth dynamics were up once again towards the end of the year due to more offered passenger services (flights) specifically to and from the USA and the Caribbean region. North Africa traffic was up due to the recovery of travel to and from tourism destinations and more offered passenger services (flights). Far East traffic developed below average. The main reason for this was the cancellation of the connection to and from Osaka, Japan. Some other Far East connections reported major

Cargo

January to December **2,128,476** **-3.9%**

In 2019 air cargo traffic declined by 3.9 % to about 2.13 million mt. Both airfreight and the smaller amount of airmail declined at almost the same rate to a volume of 2.04 million mt and 86,700 mt.

Air cargo traffic developed in line with the economic early indicators. In 2019, the worldwide production volume was significantly below the counts in 2017 and 2018. The amount of air cargo tonnage in and out of Frankfurt Airport in 2019 was below the counts for 2017 and 2018. The freight market in 2019 was distinguished by weak demand as was underscored by a strong decline of 6.5 % in the fourth quarter of the year.

The expansion of the world economy slowed down in 2019 as to be seen by the weakness of industrial production and world trade. The growing intensity of the trade conflict between the United States and China has negatively impacted bilateral trade. This impacted other countries such as Germany where industrial production has slowed down for 17 months in a row. Consequently, air cargo traffic at Frankfurt Airport has decreased for seven quarters in a row.

The sustained political insecurity has negatively impacted the Germany economy because, in comparison to many other economies, Germany is highly specialized on the export of investment goods. In addition, the weakness of worldwide car sales has impacted Germany in particular. This, of course, has an effect on airfreight traffic. The export of industrial goods (specifically automotive parts) has declined significantly.

The weakness regarding the export of industrial goods is to be seen by the minus 4.3 % outbound tonnage. This minus is above the minus for inbound tonnage. As result of the weak demand the airfreight capacities were reduced during the course of 2019. This reduced the minus in regard to capacity utilization. Nonetheless, at the end of the year it was still below the count in 2018. Belly load freight developed somewhat better than freighter aircraft freight. Despite capacity expansion freighter aircraft freight was down by 3.7 %.

When looking at regional distribution one sees that airfreight destinations both to the west and east of Frankfurt were on the decline in about the same amounts. The USA, as biggest airfreight market, stagnated in 2019. This market was still on the plus side at the beginning of the year due to more offered services. However, there were significant declines during the fourth quarter. The economy in the USA has slowed down somewhat. The fiscal impulses ended which were initiated as part of tax reform in 2018.

In contrast to North America traffic (+0.0 %) the tonnage connected to Latin America was down by 12.5 %. Brazil reported minus 17.1 %. Tonnage connected to Asia was down by 6.1 % in 2019. Less airfreight was transported on direct routes to and from Northeast Asia (China -4.6 %, Japan -16.2 %, South Korea -11.0 %). More tonnage was transported on routes to and from the hubs Istanbul and Moscow (with continuation to the Far East).

The big hubs in the Middle East reported big declines. Of all regions a growth rate could only be recorded for Africa in 2019 (+5.3 %). The growth generators were mainly Egypt (+18.0 %), Ethiopia (+14.1 %) and Morocco (+48.4 %). The political insecurity surrounding the Brexit had a negative impact on tonnage connected to Great Britain so that there was a decline of 25 %. However, Great Britain's share in the total airfreight market is only 1 %.

Aircraft Movements	**January to December**	**513,912**	**0.4%**
Maximum Take Off Weights / MTOW (t)	**January to December**	**31,872,251**	**0.8%**

In 2019 there were 0.4 % more aircraft movements and a new record count of 513,912. After the heavy increases in 2017 and 2018 the growth dynamics slowed down greatly in 2019. Without flight cancelations due to strikes and bad weather conditions the growth rate would have been 1.0 %. Nonetheless, there were seven records for single months in the year 2019 (March thru September).

A new record was also established concerning MTOWs with a growth rate of 0.8 % and a total count of 31.8 million tons. The old 2018 record was surpassed by about 260,000 tons. Without flights cancelations due to strikes and bad weather conditions the growth rate would have been 1.3 %. There were nine MTOW records for single months (January to September).

In contrast to 2018, MTOW developed above average over against aircraft movements. The main reason for this was the high growth rate of long range flights. As result, the quotient MTOW/aircraft landing increased by 0.5 tons to an average of 124.0 t per aircraft landing. However, this was still below the counts seen in the years 2015 to 2017 because of the inclusion of more and more big aircraft in the fleets of the airlines.

In 2019 the growth of the passenger count by far exceeded the increase of offered passenger services (flights). The quotient passengers per passenger aircraft movement increased by 1.2 % to 146.8. During the first quarter the count of aircraft movements increased more than the passenger count. After that the trend went in the other direction. The seat load factor developed positively in the second and fourth quarter. During the entire year 2019 it was 79.6 % and slightly above the level in 2018.

Passenger aircraft flights to and from other destinations in Germany were down by 1.6 %. There were declines for Berlin, Düsseldorf, Bremen and Leipzig. The offered passenger services (flights) also stagnated for remaining Europe. Traffic to and from North, West and East Europe declined. There were more offered services for South and Southeast Europe. The most growth was reported for Turkey and Ireland. The connections for Great Britain were down. In 2019 some connections were discontinued (Jönköping, Bristol). There were new connections for Gazinasa and Tivat.

In 2019 intercontinental traffic reported a moderate growth rate of 2.7 %. North America was the growth generator (+3.5 %). New frequencies for Austin and Denver (USA) facilitated growth. New connections with Cancun (Mexico), Barbados and Costa Rica offset the declines for the Dominican Republic and Brazil. Thus, Latin America reported a growth rate of 0.8 %.

Africa was a further growth generator (+6.7 %). The strongest growth of offered passenger services (flights) was seen for Ethiopia followed by Egypt, Morocco and Gambia. Offered passenger services for Asia were up by 0.9 %. There were reductions for Japan due to the Osaka connection having transferred to Munich. There were major declines connected to offered passenger services (flights) for India, Malaysia, Hong Kong and China. Traffic to and from the Middle East recovered and increased in comparison to 2018.

Freighter aircraft movements were up by 1.8 % in 2019 and developed above average over against total aircraft movements. The MTOWs were up 2.7 % compared to 2018. There was far more European traffic connected to Austria and Spain. There was slight growth for intercontinental traffic due to additional connections to and from America (mainly Mexico). There was a decline of offered services (flights) for Africa and Asia (mainly VAE).

Tables

Month

Type of traffic		Aircraft Movements abs.	Δ%	Passengers abs.	Δ%	Air Freight (t) abs.	Δ%	Air Mail (t) abs.	Δ%
Total (civil aviation traffic)	arr.+dep.+tr.	36,635	-4.4%	4,868,689	-1.2%	161,474	-7.3%	8,910	-5.6%
	arriving	18,375	-4.4%	2,390,814	-1.2%	75,657	-9.1%	4,814	-1.7%
	departing	18,260	-4.5%	2,470,318	-1.1%	83,157	-6.0%	4,065	-10.2%
	arr.+dep.	36,635	-4.4%	4,861,132	-1.2%	158,814	-7.5%	8,878	-5.8%
	transit			7,557	5.1%	2,660	5.9%	32	68.3%
Commercial traffic	arr.+dep.	36,177	-4.5%	4,860,784	-1.2%	158,811	-7.5%		
Scheduled/Charter	arr.+dep.	35,896	-4.4%	4,860,080	-1.2%	158,811	-7.5%		
	transit			7,514	4.6%	2,658	5.9%		
Passenger flights	arr.+dep.	34,191	-4.5%	4,860,080	-1.2%	59,771	-6.0%		
Freighter flights	arr.+dep.	1,705	-3.4%			99,040	-8.4%		
Mail flights	arr.+dep.	0	n.def.					0	n.def.
Other traffic	arr.+dep.	281	-8.8%	704	-17.5%				
Non-comercial traffic	arr.+dep.	458	0.4%	348	47.5%	3	>100%		
Ferry flights	arr.+dep.	373	6.6%						

for information only:	Air Cargo (t) abs.	Δ%
arr.+dep.+tr.	170,384	-7.2%
arr.+dep. (acc. to ACI-definition)	167,692	-7.4%

Year-to-date

Type of traffic		Aircraft Movements abs.	Δ%	Passengers abs.	Δ%	Air Freight (t) abs.	Δ%	Air Mail (t) abs.	Δ%
Total (civil aviation traffic)	arr.+dep.+tr.	513,912	0.4%	70,560,987	1.5%	2,041,775	-3.9%	86,701	-3.8%
	arriving	256,961	0.4%	35,458,489	1.6%	979,317	-3.6%	44,936	-0.2%
	departing	256,951	0.4%	35,002,151	1.4%	1,025,429	-4.3%	41,493	-7.3%
	arr.+dep.	513,912	0.4%	70,460,640	1.5%	2,004,746	-3.9%	86,428	-3.7%
	transit			100,347	1.1%	37,029	-0.5%	273	-6.2%
Commercial traffic	arr.+dep.	507,520	0.4%	70,456,630	1.5%	2,004,566	-3.9%		
Scheduled/Charter	arr.+dep.	502,634	0.3%	70,443,339	1.5%	2,004,566	-3.9%		
	transit			99,442	0.2%	37,027	-0.5%		
Passenger flights	arr.+dep.	480,682	0.3%	70,443,339	1.5%	746,995	-4.3%		
Freighter flights	arr.+dep.	21,952	1.8%			1,257,571	-3.7%		
Mail flights	arr.+dep.	0	n.def.					0	n.def.
Other traffic	arr.+dep.	4,886	7.7%	13,291	11.5%				
Non-comercial traffic	arr.+dep.	6,392	-4.5%	4,010	-2.5%	180	>100%		
Ferry flights	arr.+dep.	5,123	-0.9%						

for information only:	Air Cargo (t) abs.	Δ%
arr.+dep.+tr.	2,128,476	-3.9%
arr.+dep. (acc. to ACI-definition)	2,091,174	-3.9%