

Monthly Traffic Results Frankfurt Airport

with Annual Report

December 2020

Traffic category	December		January to December	
	absolute	Δ%	absolute	Δ%
Passengers (arr.+dep.+transit)	891,925	-81.7%	18,770,998	-73.4%
Airfreight (metric tons) (arr.+dep.+tr.)	180,516	11.8%	1,895,074	-7.2%
Airmail (metric tons) (arr.+dep.+tr.)	5,170	-42.0%	57,554	-33.6%
Aircraft Movements (arr.+dep.)	13,627	-62.8%	212,235	-58.7%
MTOWs (metric tons) (arr.)	1,100,860	-53.6%	14,874,646	-53.3%
Traffic Units (arr.+dep.+tr.)*	2,748,793	-58.2%	38,297,276	-58.3%
Traffic Units (arr.+dep.)**	2,714,899	-58.5%	37,888,180	-58.5%
Cargo (metric tons) (arr.+dep.+tr.)	185,687	9.0%	1,952,628	-8.3%

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 differences may appear.

* Fraport internal definition: arriving+departing+transit

** As per ADV-definition: arriving+departing.

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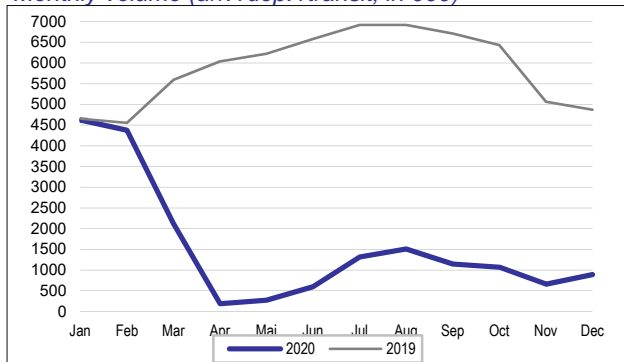
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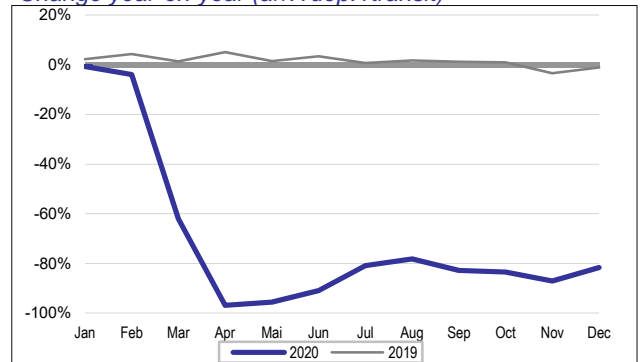
Passengers

December **891,925** **-81.7%**
January to December **18,770,998** **-73.4%**

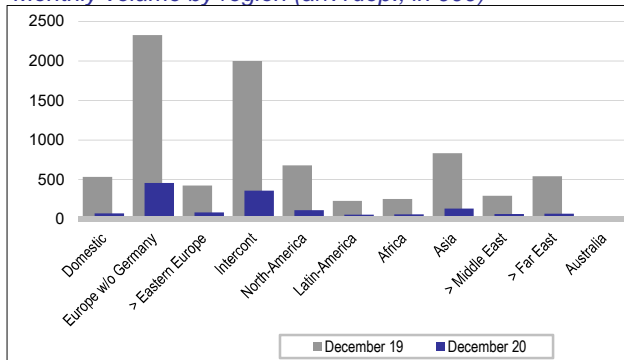
Monthly volume (arr.+dep.+transit; in 000)



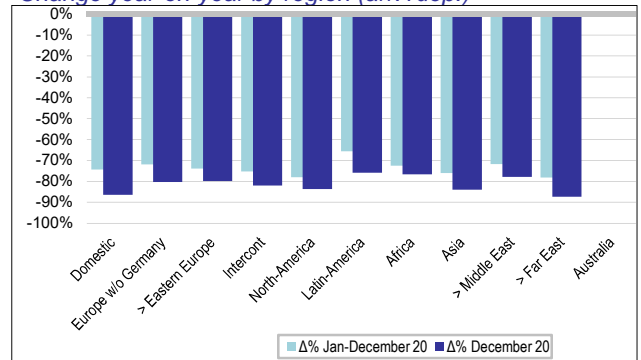
Change year-on-year (arr.+dep.+transit)



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



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



Regional evaluation by destination; source: BIAF-MAFO

Contrary to the general trend, the month of December 2020 experienced significant growth compared to November 2020. However, this increase was still at a low overall level. There were 81.7 % fewer passengers in December 2020 compared to the same month in 2019. In November 2020 the passenger count was 87.0 % below that in November 2019. The reason for the increase had to do with higher demand for ethnic travel as well as vacation travel during the Christmas holidays. Furthermore, the continued strong decline of demand and worldwide lockdowns helped to concentrate intercontinental traffic at Frankfurt Airport.

The highest drop in demand was the result of the second lockdown with a major negative impact on routes with a high amount of business travel (Germany -86.5 % and Western Europe -88.0 %). In contrast, traditional ethnic destinations in South, Southeast and East Europe on the European continent reported the least decline regarding the passenger count. Despite extensive travel restrictions the seasonal winter vacation destinations, such as the Canary Islands, some Caribbean Islands or the Maldives reported above-average passenger counts.

The upward trend was seen by the passenger count concerning intercontinental traffic (-82.0 % compared to December 2019). In November 2020 the count was still at -88.1 % compared to November 2019. There was a lot of concentration of traffic in Frankfurt regarding all traffic regions. Specific mention, however, is made of increased travel demand for travel to and from South America and Central Africa. There was also above-average development of traffic for specific tourism destinations such as, for example, various Caribbean Islands.

The heaviest decline of demand for travel was seen for the Far East except for India. In the Far East there was a high hesitation on the part of the people to travel anywhere. The concentration of intercontinental traffic in Frankfurt helped to boost the passenger count on so-called feeder flights from and to other airports in Germany and Europe. This was proven by an above-average passenger count on flights to and from Munich.

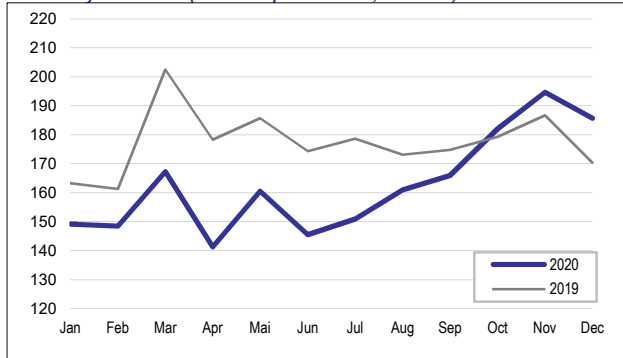
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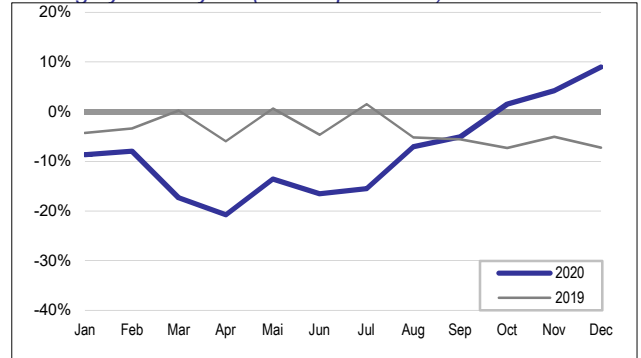
Cargo (t)

December	185,687	9.0%
January to December	1,952,628	-8.3%

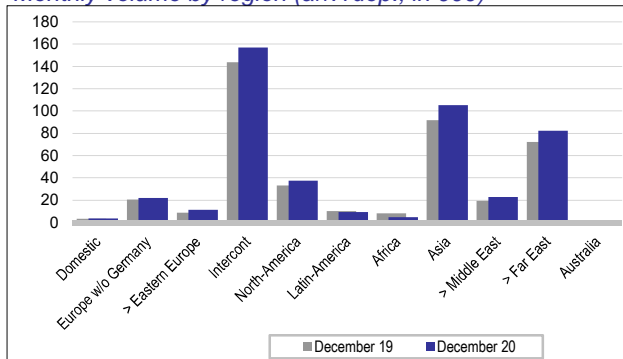
Monthly volume (arr.+dep.+transit; in 000)



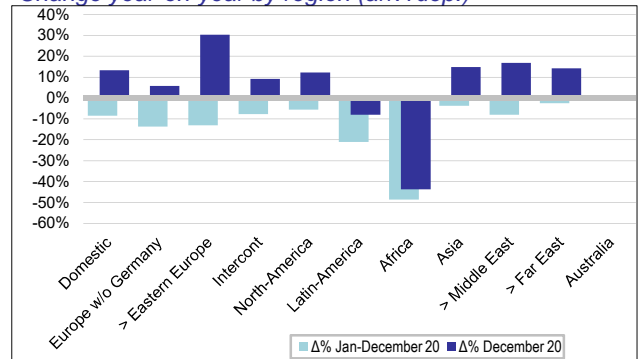
Change year-on-year (arr.+dep.+transit)



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 2020 cargo traffic experienced an exceptional dynamic growth of 9.0 % to about 185,700 mt. Airmail was down by a significant 42 %. However, airfreight was up 11.8 % to 180,500 mt. This was the highest increase in the past ten years and the second highest count for a December month in the history of Frankfurt Airport. The December count in 2007 was about 1,400 mt higher. It is really amazing because of this happening during the COVID-19 pandemic despite an enormously declining amount of cargo transported as belly load on passenger aircraft.

This high level of transported cargo continued up to the Christmas holidays. The demand between Christmas and the start of 2021 was also higher as during the same period in 2019. On December 13, 2020, the count was 8,600 mt and this was the highest count for a single day at Frankfurt Airport since about six years ago. The industrial sector in Germany experienced a very high growth rate in December 2020. This was last seen about four years ago and became the growth-generator within the Euro zone.

Inbound cargo in December 2020 (+13.8 %) developed above-average over against outbound cargo (+9.8 %). There were specifically higher amounts of inbound cargo from South Korea and China because there is still very high demand for personal protection equipment and e-commerce goods (electronics). Consequently, there was a substantial plus of 14.8 % connected to Asian cargo traffic. Cargo demand on routes to and from North America was also high so that a growth rate of 12.2 % was reported here.

Markets with a high share of perishables, such as Latin America (-8.0 %) and Africa (-43.7 %), still faced massive declines. Only cargo on routes to and from Mexico experienced a noticeable growth rate due to higher amounts of outbound cargo. Concerning Europe (+5.8 %) there was a higher amount of cargo connected to Great Britain. This was due to the shutdown of the border between France and Great Britain. Many companies flew in fresh foods on aircraft departing Frankfurt in order to avoid any supply bottlenecks.

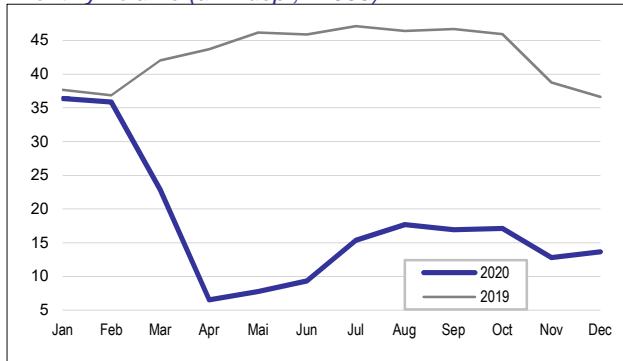
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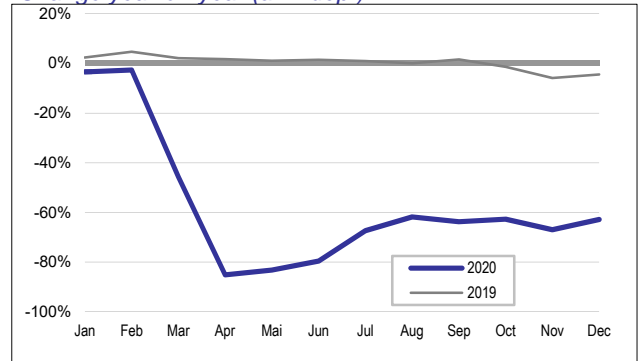
Aircraft Movements

December **13,627** **-62.8%**
January to December **212,235** **-58.7%**

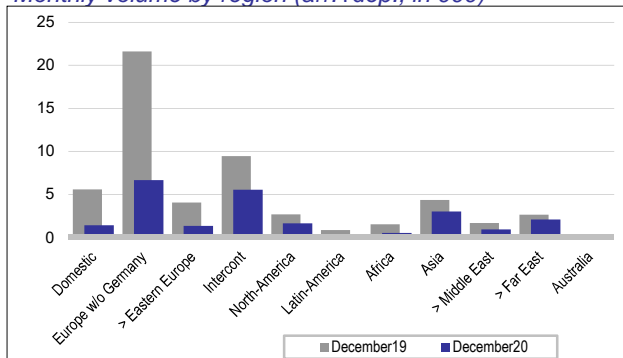
Monthly volume (arr.+dep.; in 000)



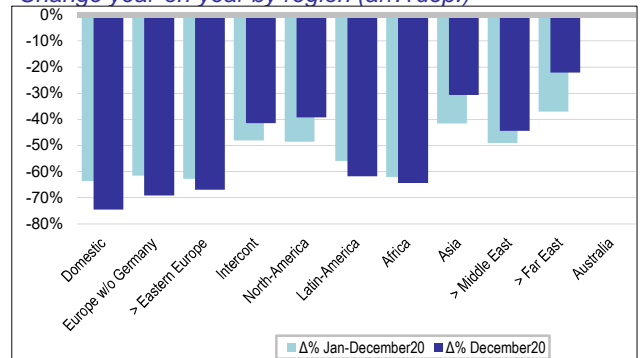
Change year-on-year (arr.+dep.)



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 2020 there were 13,627 aircraft movements (takeoffs and landings) at Frankfurt Airport. The count of aircraft movements was thus down by 62.8 % compared to December 2019. Despite the hard lockdown starting mid-December there were still 800 more aircraft movements compared to November 2020. This was mainly due to passenger aircraft and the concentration of intercontinental flights in Frankfurt and the so-called feeder flights from Munich to Frankfurt.

In Germany there were a total of 1,066 passenger flights in December 2020 (-79.5 %). This is about the same amount as in November 2020. Regarding all remaining European traffic there was a decline of 72.3 % to 5,732 passenger flights. There were about 300 more aircraft movements than in November 2020 (+5 %). In December traffic with all European countries was heavily on the decline again, specifically connected to Italy and the United Kingdom. The best counts were connected to the Canary Islands and Portugal.

Compared to December 2019, in December 2020 the intercontinental passenger aircraft flights were down by 64.7 % to 2,917 aircraft movements. Nonetheless, the most dynamic growth compared to November 2020 was seen regarding intercontinental flights (+10 %). There were growth rates connected to all other continents. The most additional connections were to and from Asia (India and South Korea). Concerning Africa traffic Nigeria and Morocco were at the top compared to November 2020. Regarding America both the USA and Columbia were at the top of the list.

Compared to December 2019 the freighter aircraft flights were up by 90.3 % to 3,244 freighter aircraft movements. There were about 100 more freighter aircraft movements than in November 2020. There were also far more freighter aircraft flights during the Christmas holidays than was the case last year. Intercontinental cargo traffic increased substantially compared to last year. The growth rate was 120 %. Most additional freighter aircraft flights were connected to the USA, South Korea and China.

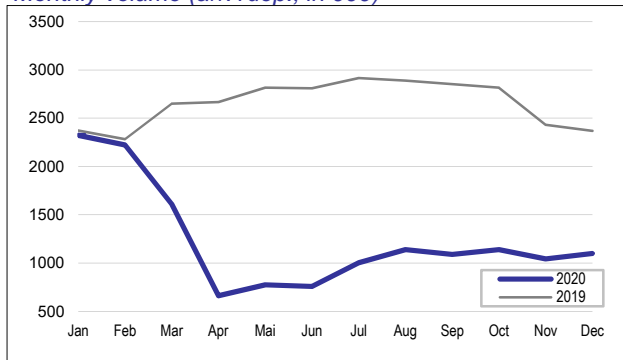
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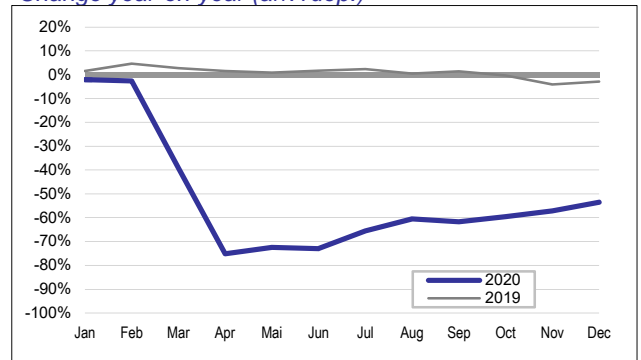
Maximum Take Off Weights / MTOW (t)

December	1,100,860	-53.6%
January to December	14,874,646	-53.3%

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



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



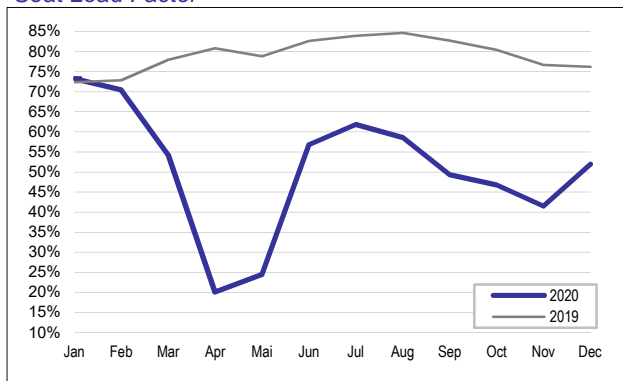
MTOWs in December 2020 at about 1.1 million tons was 53.6 % below the count in December 2019. Due to the high amount of freighter aircraft flights and the relocation of many intercontinental aircraft to Frankfurt the MTOWs in December 2020 developed significantly above-average to the count of aircraft movements. This was also the case in November 2020.

In comparison to November 2020 the average MTOW per aircraft landing was somewhat down. However, compared to December 2019 the count was up by almost 25 % to 161.1 t. Utilization was up again for the first time since July of this year to 51.9 % in December 2020. The quotient passengers per passenger aircraft movement was also up to 91.7.

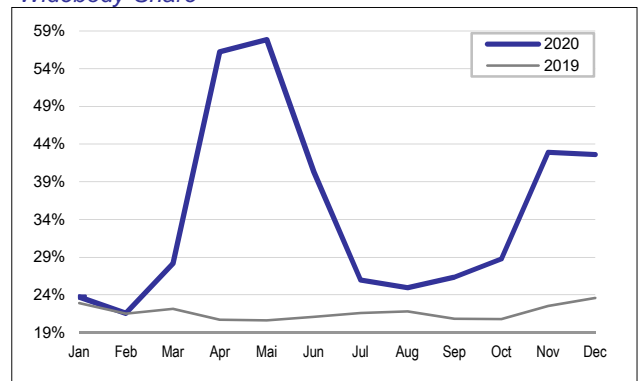
Special Information

The seat load factor in December 2020 was at 51.9% versus 76.2% in the same month last year.
 The share of widebody aircraft was at 42.6% (December 19: 23.6%).
 The ratio 'passengers per passengerflight (scheduled & charter)' was at 91.7 vs. 142.4 in the same month last year.
 Compared to the same month last year the flight punctuality rate decreased by 0.9%-points and was at 74.1%.

Seat Load Factor



Widebody-Share



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Passengers **January to December** **18,770,998** **-73.4%**

The COVID-19 pandemic had a major impact on the year 2020. The pandemic started early 2020 in China and soon spread to Europe. Compared to 2019, Frankfurt Airport lost about three-fourths of its passengers (-73.4 %). There were about 51.8 million fewer passengers in 2020. The total count was about 18.8 million in 2020. This was a dramatic decline of demand for air travel. Already at the start of the year there was a slight decline of demand for air travel due to a stuttering economy. At that time several airlines started to consolidate offered passenger services (flights).

In February 2020, there were already first effects of the spreading COVID-19 virus. Despite an additional day (leap year) the passenger count dropped noticeably for the first time in three years. This was the end of a continued growth phase. During March there were extensive travel restrictions which had an immediate negative impact on international air traffic. Something like this had never been experienced before. There were dramatic declines of the passenger count all over the world leading to extensive cancellations of flights in the months April thru June.

The German Federal government and travel organizers chartered aircraft to enable the return of citizens stuck in foreign countries. However, this had only a minute impact on overall air traffic which had practically come to a standstill. The daily passenger count was minus 95 % compared to the same period in 2019. In mid-June there was a slight increase of air travel after travel restrictions were lifted for 31 countries. The airlines slowly increased offered passenger services. Consequently, at the start of the summer vacation period there was a slight recovery phase for air travel within Europe.

With the increase of people infected by the COVID-19 virus and concurrent travel warnings the very slight recovery ended abruptly in September. At the beginning of November the second lockdown ensured that there would be no sustained recovery of demand for air travel. After four months the monthly passenger count fell below 1 million once again. There was slightly more demand for air travel due to the Christmas holidays. During this phase of extremely low demand for air travel there was a concentration of intercontinental air traffic in Frankfurt.

At the end of 2020 Frankfurt Airport counted only 18.8 million passengers. This was the amount of passengers recorded in 1984. This count of 18.8 million was far off from the number seen in 2019. All peaks were at the beginning of 2020. This was unusual. However, they were about 33 % lower than in 2019. In early 2020 the airlines started to reduce offered passenger services (flights). In addition, changed company travel guidelines effected low demand for domestic travel (-74.3 %). Domestic travel was practically at a standstill at the start of the crisis.

Only the primary connections to and from Berlin, Hamburg and Munich and some secondary routes were maintained. As a result of extensive concentration of intercontinental traffic in Frankfurt there was more feeder traffic from Hamburg and Munich. European traffic (-72.0 %) had weak results during the year. However, open borders and vacation travel ensured substantial recovery.

At the end of 2020 the COVID-19 pandemic hit more and more European quite hard. Nonetheless, European traffic recorded the best results. Specific mention is made of Greece, Portugal, the Canary Islands and Turkey. They were able to maintain about 33 % of the traffic volume recorded in 2019. In addition to vacation travel, there was demand for ethnical travel. Thus, there was a noticeable increase of travel by the end of the year, specifically to and from South, Southeast and East Europe.

Intercontinental traffic fared best of all until the drastic decline of demand starting in February/March. After that intercontinental traffic fared worst of all among all regions until the start of the winter season. In contrast to continental traffic, the travel warnings were never really lifted. Only major connections were maintained. That is why during the winter season intercontinental traffic was concentrated in Frankfurt. Consequently, there was slightly more demand for travel to and from destinations outside Europe.

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Cargo **January to December** **1,952,628** **-8.3%**

In 2020 air cargo traffic was down by 8.3 % to about 1.95 million mt. Airfreight was down by 7.2 % and recorded a volume of approximately 1.9 million mt. Due to far less belly-load capacities airmail declined by about 33 % to slightly above 50,000 mt.

As the COVID-19 virus started to spread the declines regarding cargo movement were the highest during the second quarter of the year (-16.9 %). After that cargo traffic recovered again. During the fourth quarter of the year it even increased by 4.9 %. This was the first growth for a single quarter in almost three years. Cargo development in 2020 was additionally impaired by the lack of belly-load capacities otherwise available on passenger aircraft. That is why the economic early indicators for industry showed a plus in advance.

Due to the huge reduction of the number of passenger aircraft flights the count of belly-load cargo was down by about 50 % during 2020. There was a decline of 82.1 % cargo on passenger aircraft during the second quarter of the year. During the third and fourth quarters the declines were not that heavy any longer. Due to far fewer passenger aircraft flights and higher demand to move cargo (mention is made of personal protection equipment) many passenger aircraft were used to solely fly cargo in addition to the already operating freighter aircraft.

The flown top commodities (protective masks, medical equipment, eCommerce products) enabled a "small-part" cargo structure. This means low weight and a high number of pieces. Consequently, handling time and expense increased above average due to a high share of "bulk freight" and additional operational limitations. At "Cargo City South" at Frankfurt Airport the handling agents working there were able to significantly increase the volume of air cargo handled in the year 2020.

The rate system of the airlines changed from originally medium- and long-term agreements with the shipping companies to a very short-term charter business. The lacking airfreight capacities and concurrent high demand effected freight rates to go way up. This resulted in the use of additional so-called "preighters" (passenger aircraft used for freight only). The peak of the use of "preighters" was in May 2020 with about 1,800 aircraft movements. There was less utilization during the summer months. However, utilization of "preighters" increased again during the fourth quarter of the year.

There were about 8,600 "preighter" flights in the year 2020. These flights transported a cargo volume of over 150,000 mt (8 % share). With the increase of passenger services (flights) being offered by the airlines the freight rates started to decline somewhat. By the end of the year they, however, started to climb again and were far above the rates seen in 2019.

Since the number of passenger aircraft flights almost came to a standstill and more freighter aircraft had to be deployed, the freighter aircraft share was its highest in May (93.5 %). For the entire year of 2020 this results in a new peak value of 80.7 %. The general export weakness, as result of the spreading of the COVID-19 virus, is also to be seen by the amount of outbound cargo. It declined by 8.8 % whereas inbound was only down by 5.9 %. The ratio between outbound and inbound cargo tonnage was balanced.

In the year 2020 the markets with a high share of perishables, such as Latin America (-20.9 %) and Africa (-48.6 %), experienced high declines. The Far East market fared better due to the additional air cargo demand for personal protection equipment and high-tech products (tablets/notebooks). Here the decline was only 2.4 %. Direct traffic with South Korea was up significantly (+21.2 %). China (-2.1 %) and Hong Kong (-3.3 %) experienced a less setback than all other traffic.

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Aircraft Movements	January to December	212,235	-58.7%
Maximum Take Off Weights / MTOW (t)	January to December	14,874,646	-53.3%

After three years of very steady increase the count of aircraft movements at Frankfurt Airport declined drastically as result of the COVID-19 pandemic. After a record number in 2019 there were only 212,235 aircraft movements at this airport in 2020. The decline rate is 58.7 % compared to the year 2019. Passenger aircraft flights were down by 64.1 % to 172,721 aircraft movements. Freighter aircraft traffic increased by 42.6 % to 31,302 aircraft movements.

At the beginning of the year air traffic was hardly affected by the COVID-19 crisis. However, in February/March it soon came to an almost complete standstill as result of the travel warnings. Summer travel effected a very slight recovery. Nonetheless, aircraft movements were 40 % below the count recorded in 2019. In the fall of 2019 the COVID-19 infection rates increased once again and this resulted in fewer passenger services (flights) being offered. December was somewhat better due to the Christmas holidays. All in all, the aircraft movement count in 2020 was comparable to the count back in 1976.

MTOWs were down by 53.3 % to about 14.9 million tons. This corresponds to the count in 1987. Due to the increased share of freighter aircraft flights in 2020 (approx. 15 %) the MTOWs were significantly affected by the pandemic at a below proportional rate. In May 2020 the share of freighter aircraft flights even reached a share of almost 50 %. For the first time there were more freighter than passenger aircraft flights. In April the average MTOW per aircraft landing reached a new historic peak of 204.4 t. Overall in 2020 the count in 2020 climbed by 13 % to 140.2 t.

During the COVID-19 pandemic the utilization of seats on passenger aircraft declined greatly. In January and February the seat load factors were still above 70 %. In April and May this was down to just slightly above 20 %. In June, July and August the seat load factor was around 60 %. In September it dropped below the 50 % level again. Overall, in 2020 the seat load factor was 58.4 % and 20 percentage points below the count in 2019. The same applies for the quotient passengers per passenger aircraft movement. The count was 108.6 in 2020 and 26 % below the level in the year 2019.

Starting mid-February the number of flights to and from other German airports declined drastically (-67.0 %) due to the COVID-19 pandemic. There was more or less only traffic with Berlin, Hamburg and Munich. There was less decline connected to Munich over against other airports. European traffic was down by 63.4 %. All countries were affected by heavy declines. The highest declines of offered passenger services were connected to Italy and Spain. The destinations Canary Islands, Greece, Croatia and Portugal still fared best of all.

In 2020 there were 63.9 % fewer intercontinental passenger flights. Due to the COVID-19 pandemic the number of offered passenger services (flights) was reduced and then mostly completely discontinued. There were a few additional aircraft movements in March and April as the German government booked charter flights to pick up Germans stranded in faraway countries. Most all airlines started operations again in the summer of 2020. Intercontinental traffic stabilized at a very low level and increased slightly from month to month. The main reason for this was the concentration of intercontinental flights in Frankfurt.

Since many flight frequencies to and from China were already discontinued at the end of January it is obvious that China recorded the highest decline (-82 %). Things were far better for Qatar and the United Arab Emirates. The offer connected to Asia was down by 64.6 %. The count of offered services (flights) to and from North America fell by 62.3 %. Latin America dropped by 59.8 %. In 2020 the offered services (flights) to and from Africa were reduced by 67.1 %. Most flights were connected to Egypt and the fewest number of flights were connected to Ethiopia.

Cargo traffic was far less affected by the COVID-19 pandemic over against passenger traffic. In order to make up for the missing belly-load capacities and to serve demand, there were about 8,600 "preighter" (passenger aircraft used for freight only) flights in 2020. The freighter flight offer was 42.6 % higher than in 2019. The freighter aircraft movements connected to Europe were up by 8.6 % compared to 2019 whereas the cargo offer connected to other continents increased by a significant 60.5 %.

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Tables

Month		Aircraft Movements		Passengers		Air Freight (t)		Air Mail (t)	
		abs.	Δ%	abs.	Δ%	abs.	Δ%	abs.	Δ%
Type of traffic									
Total (civil aviation traffic)	arr.+dep.+tr.	13,627	-62.8%	891,925	-81.7%	180,516	11.8%	5,170	-42.0%
	arriving	6,832	-62.8%	414,428	-82.7%	86,117	13.8%	3,159	-34.4%
	departing	6,795	-62.8%	474,789	-80.8%	91,288	9.8%	2,004	-50.7%
	arr.+dep.	13,627	-62.8%	889,217	-81.7%	177,405	11.7%	5,163	-41.8%
	transit			2,708	-64.2%	3,111	17.0%	7	-77.7%
Commercial traffic	arr.+dep.	13,181	-63.6%	889,086	-81.7%	177,404	11.7%		
Scheduled/Charter	arr.+dep.	12,959	-63.9%	888,575	-81.7%	177,404	11.7%		
	transit			2,708	-64.0%	3,111	17.0%		
Passenger flights	arr.+dep.	9,715	-71.6%	888,575	-81.7%	33,363	-44.2%		
Freighter flights	arr.+dep.	3,244	90.3%			144,042	45.4%		
Mail flights	arr.+dep.	0	n.def.					0	n.def.
Other traffic	arr.+dep.	222	-21.0%	511	-27.4%				
Non-comercial traffic	arr.+dep.	446	-2.6%	131	-62.4%	1	>100%		
Ferry flights	arr.+dep.	374	0.3%						

for information only:		Air Cargo (t)	
		abs.	Δ%
arr.+dep.+tr.		185,687	9.0%
arr.+dep. (acc. to ACI-definition)		182,568	8.9%

Year-to-date		Aircraft Movements		Passengers		Air Freight (t)		Air Mail (t)	
		abs.	Δ%	abs.	Δ%	abs.	Δ%	abs.	Δ%
Type of traffic									
Total (civil aviation traffic)	arr.+dep.+tr.	212,235	-58.7%	18,770,998	-73.4%	1,895,074	-7.2%	57,554	-33.6%
	arriving	106,084	-58.7%	9,579,417	-73.0%	921,759	-5.9%	33,209	-26.1%
	departing	106,151	-58.7%	9,165,910	-73.8%	935,206	-8.8%	24,111	-41.9%
	arr.+dep.	212,235	-58.7%	18,745,327	-73.4%	1,856,965	-7.4%	57,320	-33.7%
	transit			25,671	-74.4%	38,109	2.9%	234	-14.3%
Commercial traffic	arr.+dep.	207,003	-59.2%	18,742,950	-73.4%	1,856,931	-7.4%		
Scheduled/Charter	arr.+dep.	204,023	-59.4%	18,735,503	-73.4%	1,856,931	-7.4%		
	transit			25,651	-74.2%	38,107	2.9%		
Passenger flights	arr.+dep.	172,721	-64.1%	18,735,503	-73.4%	365,629	-51.1%		
Freighter flights	arr.+dep.	31,302	42.6%			1,491,302	18.6%		
Mail flights	arr.+dep.	0	n.def.					0	n.def.
Other traffic	arr.+dep.	2,980	-39.0%	7,447	-44.0%				
Non-comercial traffic	arr.+dep.	5,232	-18.1%	2,377	-40.7%	35	>100%		
Ferry flights	arr.+dep.	4,167	-18.7%						

for information only:		Air Cargo (t)	
		abs.	Δ%
arr.+dep.+tr.		1,952,628	-8.3%
arr.+dep. (acc. to ACI-definition)		1,914,285	-8.5%