Monthly Traffic Results
Frankfurt Airport

with Annual Report

December 2023

Traffic category	December		January to December	
	absolute	Δ%	absolute	Δ%
Passengers (arr.+dep.+transit)	4,574,665	15.2%	59,359,539	21.3%
Airfreight (metric tons) (arr.+dep.+tr.)	166,984	7.6%	1,890,253	-3.9%
Airmail (metric tons) (arr.+dep.+tr.)	4,134	-8.0%	41,043	-5.2%
Aircraft Movements (arr.+dep.)	33,534	11.2%	430,436	12.6%
MTOWs (metric tons) (arr.)	2,173,924	10.8%	27,009,378	11.4%
Traffic Units (arr.+dep.+tr.)*	6,285,847	12.9%	78,672,498	14.0%
Traffic Units (arr.+dep.)**	6,233,543	12.7%	77,981,359	13.8%
Cargo (metric tons) (arr.+dep.+tr.)	171,118	7.2%	1,931,296	-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 UEN-MF, 15.01.2024

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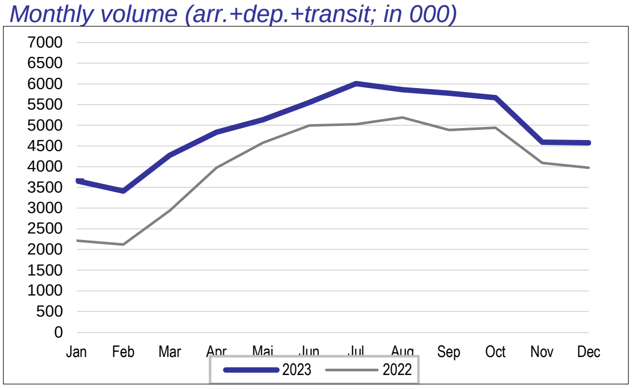
Document: Monatsbericht ab2004 - Vorlage_v5.xlsm

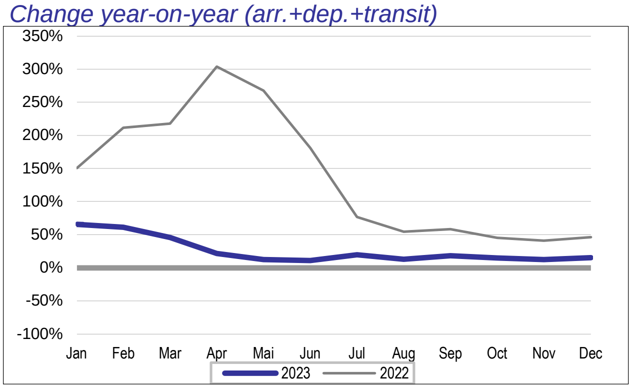
Passengers

December	**4,574,665**	**15.2%**
January to December	**59,359,539**	**21.3%**

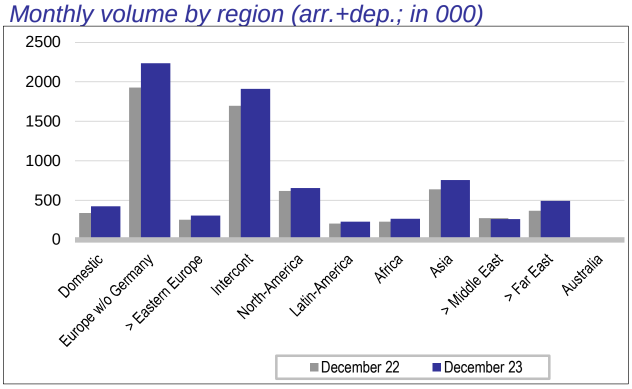
Monthly volume (arr.+dep.+transit; in 000)



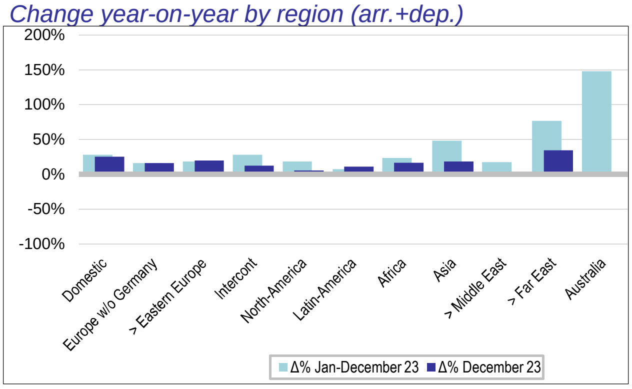
Change year-on-year (arr.+dep.+transit)



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



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



Regional evaluation by destination; source: BIAF-MAFO

In the last month of the year 2023 the passenger count at Frankfurt Airport was approximately 4.6 million passengers and 15.2 % above the December 2022 level. The December 2023 count is back to about 94 % of the level before the start of the COVID-19 pandemic. During December 2023 the passenger count at Frankfurt Airport profited from detour traffic coming from Munich as result of several heavy snow storms in Bavaria.

Regarding European traffic (+16.0 %) the traditional vacation and business travel destinations recorded substantial growth rates compared to last year. These destinations are now back to about 96 % of the 2019 level. Specific mention regarding West Europe is made of Great Britain (+17.9 %), Austria (+35.2 %), regarding South Europe Italy (+16.5 %), regarding East Europe Poland (+33.6 %) and regarding Southeast Europe Türkiye (+15.2 %) and Greece (+25.8 %).

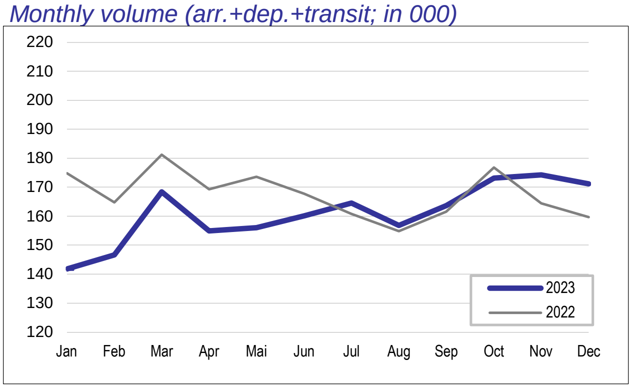
Intercontinental traffic achieved a plus of 12.6 % which is at about 95 % of the 2019 level. The Far East recorded exceptional growth rates. Traffic to and from China is recovering well. Traffic to and from India is above the levels seen in 2022 and 2019. Traffic connected to the Middle East was inconsistent. It was the only region to record a minus (-3.2 %). There were growth rates for Qatar and the United Arab Emirates. In contrast, there were minus rates for Lebanon and Israel due to the current war taking place in that region of the world.

Traditional tourism winter travel destinations were very popular. Specific mention is made of Barbados (+76.5 %), Martinique (+68.6 %), Morocco (+34.2 %), Algeria (+32.3 %), South Africa (+30.3 %) and Kenia (+34.9 %). Regarding traffic connected to North America specific mention is made of Chicago and Seattle if looking at the passenger count. Traffic to and from other airports in Germany also recovered quite well (+25.4 %). Nonetheless, domestic traffic is still to a greater degree behind the 2019 levels. The recovery rate is only at about 80 %.

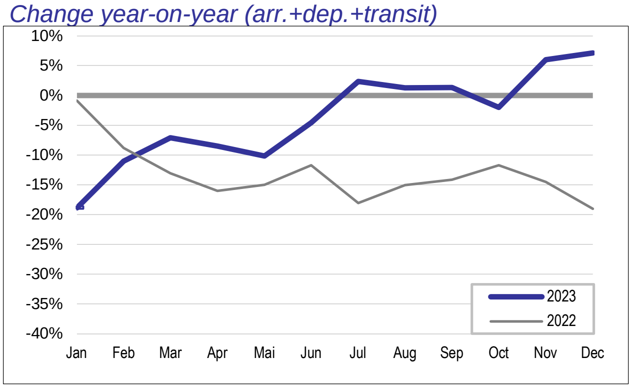
Cargo (t)

December	**171,118**	**7.2%**
January to December	**1,931,296**	**-3.9%**

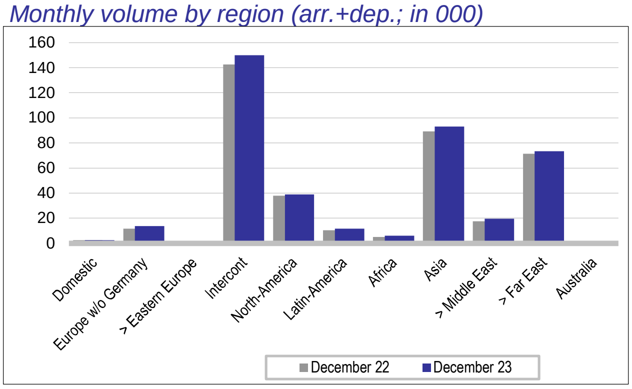
Monthly volume (arr.+dep.+transit; in 000)



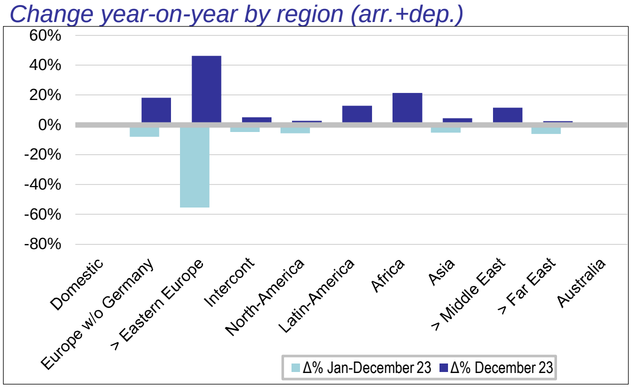
Change year-on-year (arr.+dep.+transit)



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



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



Regional evaluation by destination; source: BIAF-MAFO

As was the case in November, in December 2023 the cargo count increased - compared to December 2022 - dynamically by 7.2 % to a volume of about 171,100 mt. Consequently, this count turned out to be 0.4 percentage points above December 2019 before the start of the pandemic. The cargo volume was quite high in the week before Christmas and way above the count in December 2022. Last year the volume started to drop earlier than usual as the month progressed.

The growing trend connected to the belly cargo count continued to point upwards. This is proven by a dynamic growth rate of 21.0 %. As a result, the belly load volume was exceeded by 2.0 % once compared to the pre-crisis year 2019. The capacity utilization rate connected to sole freighter aircraft was higher in December than in previous months. Thus, the cargo count on sole freighter aircraft was up by 1.7 %. In 2022 there were still many more so-called preighter flights (passenger aircraft solely carrying cargo). Hence, the increase of the sole freighter count could not fully compensate for the tonnage on all freighter aircraft flights (-0.4 %).

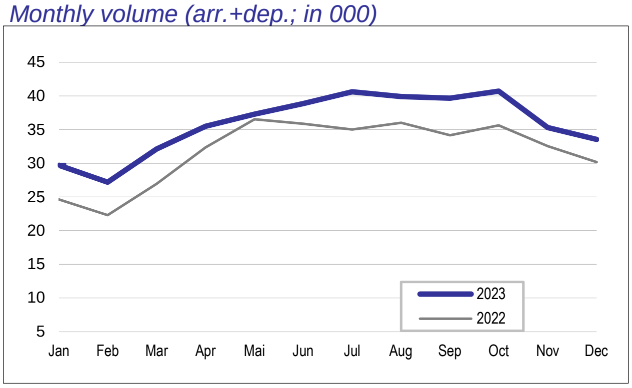
Regarding inbound cargo there was a noticeable plus of 11.0 % connected to the Asian region. There were high inbound growth rates for routes to and from India. The big Middle East hubs, including Istanbul, directed more and more Asia-Europe traffic via their hubs to Frankfurt. Furthermore, there was a major increase of tonnage connected to flights arriving from South America (specfically Brazil and Chile). Africa (specifically Egypt) likewise reported dynamic growth rates. On these routes a huge amount of perishables is transported to West Europe.

Consequently, there were major tonnage growth rates on routes connected to Asia (+4.3 %, Far East +2.6 % and Middle East +11.5 %), Europe (+18.2 %), Latin America (+12.8 %) and Africa (+21.4 %). If looking at the Asian routes China achieved a growth rate of 5.5 %. In contrast, the tonnage connected to Japan declined by a remarkable 27.2 %. Regarding North America there was a moderate growth rate of 2.7 %.

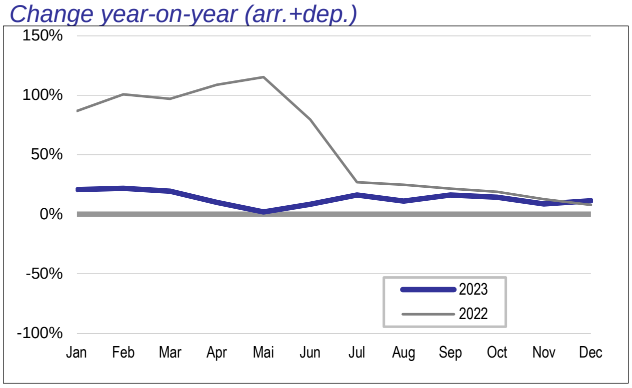
Aircraft Movements

December	**33,534**	**11.2%**
January to December	**430,436**	**12.6%**

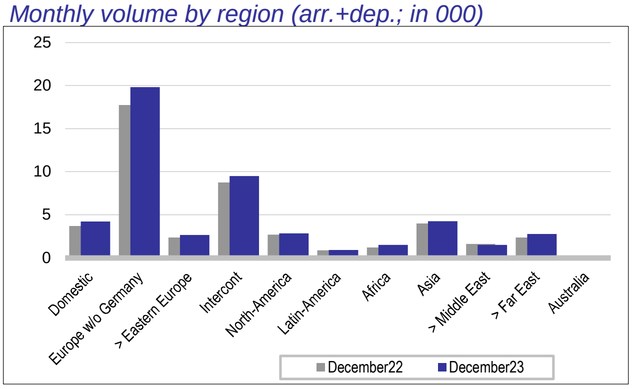
Monthly volume (arr.+dep.; in 000)



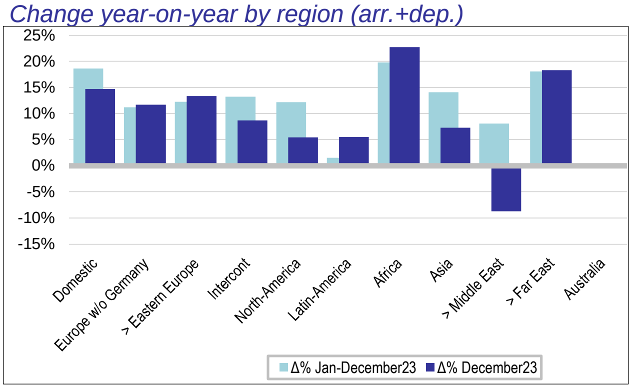
Change year-on-year (arr.+dep.)



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

There were 33,534 aircraft movements (takeoffs and landings) at Frankfurt Airport in December 2023. Compared to the same month last year, this was a growth rate of 11.2 % or about 3,400 aircraft movements, respectively. The December 2023 count is now at 93 % of the 2019 level and as close as ever seen up to date. This positive count was helped by several flights being detoured to Frankfurt as result of the heavy snow storms in Munich at the beginning of the month. Furthermore, only very few flights were cancelled during the entire period of the Christmas holidays.

There were 3,799 aircraft movements connected to Germany. This is a plus of 16.4 % compared to December 2022 and 73 % of the 2019 level. Regarding aircraft movements connected to Europe there was a dynamic growth rate of 11.7 % to 18,693 aircraft movements. This count is now at 90 % of the 2019 level. Regarding Southeast Europe there were almost 400 more aircraft movements than in December 2019. There are nowadays many more flights connected to Turkey, Macedonia and Greece.

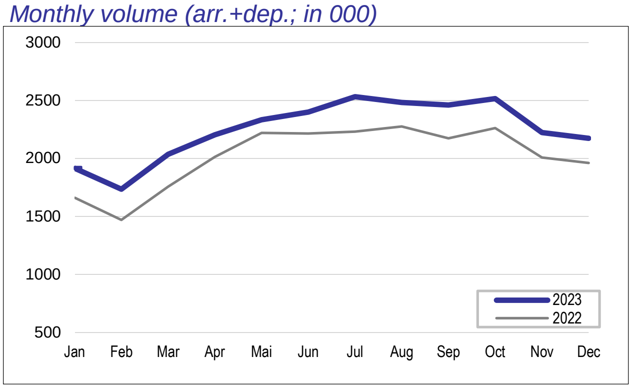
As far as flights connected to intercontinental destinations the December 2023 count is at 98 % of the 2019 level before the start of the pandemic. Compared to December 2022, there is a plus of 11.1 % to 8,101 aircraft movements. Compared to 2019, there are even plus rates for aircraft movements connected to the regions North and Middle America, Far East and Central Africa. There were specifically more flights connected to India and Kenia. In contrast, there were fewer aircraft movements connected to the Middle East resulting in a decline of 13.3 % compared to December 2022.

In the cargo sector there were 2,041 aircraft movements which means a plus of 1.9 % compared to December last year and 19.7 % above December 2019. The plus is mainly based on continental freighter aircraft movements (+13.8 %) because the intercontinental count was 3.3 % below the December 2022 count. However, in December 2022 there were hardly any more so-called preighter flights (passenger aircraft solely carrying cargo). Thus, this decline slowed down significantly.

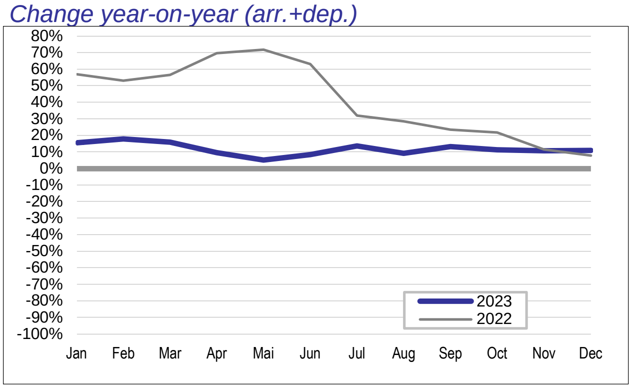
Maximum Take Off Weights / MTOW (t)

December	**2,173,924**	**10.8%**
January to December	**27,009,378**	**11.4%**

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



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



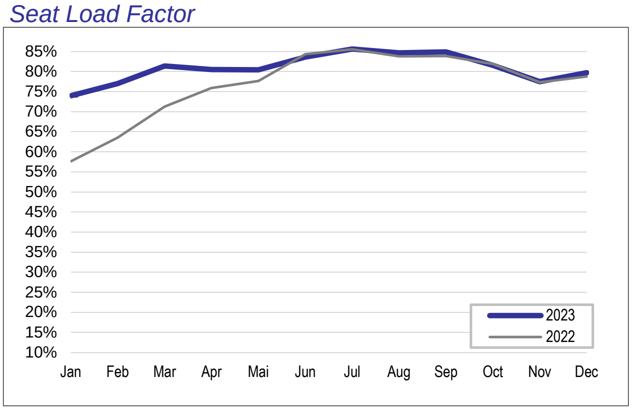
In December 2023 the MTOWs were up by 10.8 % to approximately 2.2 million tons. This count is at 92 % the level in December 2019. The MTOW per aircraft landing was 129.4 tons and slightly below the count in December 2022.This is also due to smaller aircraft having been utilized.

In December 2023 the utilization rate was at a record high. The seat load factor at 79.7 % was one percentage point above that in December 2022 and almost three percentage points above that seen in December 2019. The quotient passengers per passenger aircraft movement was 149.5 and almost three percent above the count in 2022 and approximately five percent above the count in December 2019.

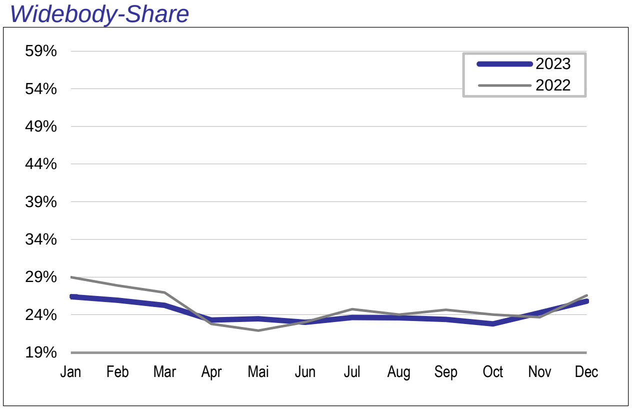
Special Information

The seat load factor in December 2023 was at 79.7% versus 78.7% in the same month last year.
The share of widebody aircraft was at 25.8% (December 22: 26.6%).
The ratio 'passengers per passengerflight (sheduled & charter)' was at 149.5 vs. 145.5 in the same month last year.
Compared to the same month last year the flight punctuality rate increased by 6.9%-points and was at 55.0%.

Seat Load Factor



Widebody-Share



Passengers

January to December **59,359,539** **21.3%**

In the year 2023 Frankfurt Airport was able to continue its recovery from the negative impacts of the COVID-19 pandemic. With a passenger count of 59.4 million there was a growth rate of 21.3 % compared to 2022 and the 60 million mark just barely missed. Compared to the year 2019 before the start of the pandemic, Frankfurt Airport is now back to 84 % of the level in 2019.

Despite some pandemic-related travel restrictions, strikes leading to a complete shutdown of air traffic and IT failures at the beginning of the year, the first quarter of 2023 already reported remarkable growth over against the year 2022. With the start of the Easter travel season in April the demand for vacation travel increased enormously. The holidays and so-called bridging days in May and June generated more desire to travel on top.

During the entire year of 2023 there were 25 days (June through October) with a daily passenger count exceeding 200,000. In July 2023 a new record was set for a single day (213,418 passengers) since the beginning of the COVID-19 pandemic. The escalation in the Middle East since the beginning of October had no real effect on the passenger count since this region has a low share of the total passenger count anyway. The best recovery rates connected to the passenger count were seen in November and December 2023 once compared to 2019.

In addition to the dominating vacation travel, dynamics in the business travel segment likewise picked up step by step. This was specifically seen in regard to visitors to exhibitions (fairs) and events in addition to recovery of travel for personal reasons. Business travel is now back to about 60 % the level before the start of the pandemic. Specifically intercontinental and West European destinations profited from this. Domestic travel also continued its recovery. However, it is still approximately 30 % below the rate seen before the COVID-19 pandemic started.

European traffic reported a plus of 16.0 % compared to 2022 and is now at about 83 % of the 2019 passenger count. Business travel connected to West European destinations showed the biggest increase (+27.3 %) over against 2022. North European traffic likewise experienced a major increase (+14.1 % compared to 2022). Even East European traffic, which within Europe developed the slowest when compared to the pre-crisis level, had a good recovery tendency (+18.4 %).

Southeast Europe was very remarkable with the warm water destinations. The passenger counts in 2023 were above those in 2022 and in 2019 before the start of the crisis. The main growth generators were Turkey, Croatia and Greece. The Canary Islands also profited greatly from the high demand for tourism travel in the past year. In contrast, the passenger count for the Balearic Islands was below that in 2022 and in the pre-crisis year 2019.

Intercontinental traffic was up by 28.1 % compared to 2022. Throughout the entire year the main growth generator was North America (now at 96 % the level before the start of the crisis). USA: +16.9 % and Canada +25.3 % compared to 2022. The most dynamic growth was recorded for Far East traffic (+76.8 % compared to 2022) and continued to reduce the distance to the time before the COVID-19 pandemic (now at 79 % the 2019 level). The best recovery of all during 2023 is connected to China. There were also good growth rates for Japan and Vietnam.

Tourism destinations in Africa (for example Kenia or Tanzania) had major growth rates. The same applies for the Caribbean region (+11.7 % compared to 2022) which is a highly favored location. High growth was seen in the Middle East for the United Arab Emirates (+28.8 % compared to last year) and Qatar (+36.4 %). Israel and Lebanon reported declines as result of the ongoing war in the Middle East region.

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Cargo

January to December	**1,931,296**	**-3.9%**

In the year 2023 the cargo count was down by 3.9 % to about 1.93 million mt if compared to 2022. Compared to 2019 the count is down by 9.3 %. If looking at the count over the past several years the 2023 count was at the same level as in the year 2009 which was marked by a financial and economic crisis. Overall, the 2023 was about 10 % percent below the average count over the past 10 years. Airmail at about 41,000 mt (50 % the 2019 level) was down by 5.2 % over against 2022. Airfreight at about 1.89 million mt was down by 3.9 % compared to last year.

During the first six months of 2023 the decline in percent was 10.1 % and quite substantial. During the second half of the year the trend fortunately changed and cargo tonnage was up by 2.6 %. During the fourth quarter it was even up by 3.5 %. The stabilization of operations was specifically reflected by positive developments during the second half of the year. Since several freighter aircraft airlines maintained their offered services (flights) in 2023 and, consequently, a positive effect was noticeable.

Starting the second half of the year economic early indicators pointed to stabilization even though there was a decline of the cargo tonnage in 2023. The overall economic demand in the Frankfurt Airport catchment area remained weak in 2023. Higher interest rates impacted investments by industry negatively. In addition, continued high inflation impaired consumer demand. Whereas the cargo tonnage was down in Frankfurt, the level of quantities was higher than in 2022. However, still significantly below what was seen in the COVID-19 years 2020 and 2021.

As result of the weak demand and the expanded belly load capacities on passenger aircraft the worldwide yields were down by about one-third of the 2022 count. Nonetheless, they were still approximately 40 % above the 2019 level. There were hardly any more so-called preighter flights (passenger aircraft solely carrying cargo) due to the declining yield development and opening of the Chinese passenger traffic market. In 2022 about 138,000 mt were still transported on these so-called preighter flights.

The missing cargo on preighter flights and declines on sole freighter aircraft were responsible for the substantial minus regarding cargo tonnage on freighter aircraft flights (-13.6 % or almost 190,000 mt, respectively). This could not be compensated by the remarkable plus of the cargo count on passenger aircraft flights (+17.5 % or about 110,000 mt). In 2023 the volume on passenger aircraft flights was back to about 90 % of the 2019 level. In December 2023 the 2019 level was exceeded by 2.0 % for the first time again.

The ratio freighter aircraft to belly load count was 61.8 % to 38.2 % and about the same as in 2019. Due to the geopolitical situation around the world almost all trade currents in air cargo were on the decline. This, of course, also had an impact on the routes to and from Frankfurt Airport. On the high-volume routes to and from the biggest airfreight regions North America (-5.6 %) and the Far East (-6.1 %) the cargo volume count was clearly on the decline.

There was a big minus connected to the Far East, specifically the Northeast Asian countries such as China (-6.1 %), South Korea (-17.9 %) and Japan (-20.2 %). In contrast, Hong Kong (+36.5 %) and Vietnam (+36.2 %) profited from more scheduled services (flights) being offered. Regarding Latin America (-0.5 %) the tonnage connected to Mexico was up by 1.8 percentage points. The count for Africa was down by 1.1 % and almost 40 % of the 2019 count was missing.

Regarding continental traffic (-6.5 %) the in 2022 discontinued freighter aircraft capacities, as result of the war in the Ukraine, still have a somewhat negative effect. During the progression of 2023 the new A321P2F fleet operated by Lufthansa Cargo generated growth effects. However, this could not fully compensate for the declines across the continent. Regarding the Middle East there were increases for Qatar (+13.4 %) and Oman (+59.1 %). In contrast, there were substantial declines connected to the United Arab Emirates (-11.6 %) and Saudi-Arabia (-18.9 %).

Aircraft Movements	**January to December**	**430,436**	**12.6%**
Maximum Take Off Weights / MTOW (t)	**January to December**	**27,009,378**	**11.4%**

The year 2023 was clearly marked by a significant recovery after the end of the COVID-19 pandemic. With 430,436 aircraft movements (takeoffs and landings) there was a growth rate of 12.6 % compared to last year (almost 50,000 more aircraft movements). The 2023 count is now at 84 % of the 2019 level. In July and October there were over 40,000 aircraft movements. October had the most aircraft movements. The peak day was September 10, 2023, with a total of 1,376 aircraft movements.

Compared to 2022, in 2023 MTOWs were up by 11.4 % to a count of 27.0 million tons and are now at 85 % of the 2019 level. The average MTOW per aircraft landing declined over against last year by about 1 percent to 125.5 tons and, thus, is now slowly getting close to the count before the start of the COVID-19 pandemic. This effect is the result of less freighter aircraft traffic and concurrent recovery of passenger aircraft traffic.

In 2023 passenger aircraft flights recovered to a count of 394,869 which is 82 % of the 2019 level. The utilization rate connected to these passenger flights experienced new records almost month after month. Consequently, the highest utilization rate ever recorded was seen in 2023. The seat load factor at 81.3 % was about three percentage points above the 2022 count. The quotient passengers per passenger aircraft movement increased by approximately 5 percent to a historic new record at 150.3.

Passenger aircraft flights connected to other airports in Germany were at 71 % of the 2019 level. In 2023 there was a dynamic recovery regarding offered scheduled passenger services (flights) due to new feeder flights and the recovery of demand for business travel. Overall, there was an increase of 21.3 % aircraft movements over against 2022. There were more flights to and from Berlin, Münster, Munich and Hamburg.

Regarding European traffic in 2023 there were even more flights than in 2022 as well as in 2019 to several countries with attractive tourism destinations. Consequently, the recovery of overall European passenger aircraft traffic was continuous but at a slower pace. In total, offered passenger services (flights) were up by 12.3 % and back to 81 % of the 2019 level. Compared to 2022, most additional flights were connected to West Europe, specifically the United Kingdom, Austria and France. Compared to 2019, Southeast Europe fared best of all.

Passenger aircraft flights to and from intercontinental destinations were the growth generator in 2023. They increased by 22.1 % compared to 2022 and are now back to 94 % of the 2019 level. North America was the segment with the most recovery. Here there were almost 1,000 more scheduled flights than in 2019. Traffic connected to Middle America was below that in 2022. Regarding frequencies with South America a slight increase was reported.

Compared to the year 2022, traffic connected to the Far East developed most dynamically. Far many more passenger services (flights) were offered for China, Japan, Hong Kong and India. About 11 % is still missing to reach the 2019 level. Even though connections to and from the Middle East were not reduced until the fourth quarter of the year, these still negatively impacted the overall result. The frequencies with the African continent were increased significantly and are now back to 92 % of the level in 2019.

After three years of a substantially higher offer of scheduled freighter services (flights), the number of freighter aircraft flights in 2023 developed once again in direction of the level before the start of the crisis (+9.9 % compared to 2019). Overall, freighter aircraft traffic (24,135 freighter aircraft movements) was significantly down over against 2022 (-13.4 %). This can be mainly explained by the shift of cargo flights with passenger aircraft (so-called preighter flights) back to pure passenger aircraft flights (mainly with China).

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.	33,534	11.2%	4,574,665	15.2%	166,984	7.6%	4,134	-8.0%
	arriving	16,801	11.2%	2,231,715	14.9%	78,851	11.7%	2,056	-10.0%
	departing	16,733	11.2%	2,338,232	15.7%	83,377	1.9%	2,075	-6.1%
	arr.+dep.	33,534	11.2%	4,569,947	15.3%	162,228	6.4%	4,131	-8.1%
	transit			4,718	-48.9%	4,755	72.3%	3	>100%
Commercial traffic	arr.+dep.	32,993	11.3%	4,569,547	15.3%	162,227	6.4%		
Scheduled/Charter	arr.+dep.	32,634	11.4%	4,568,625	15.3%	162,227	6.4%		
	transit			4,718	-48.9%	4,755	72.3%		
Passenger flights	arr.+dep.	30,593	12.1%	4,568,625	15.3%	64,423	21.4%		
Freighter flights	arr.+dep.	2,041	1.9%			97,804	-1.5%		
Mail flights	arr.+dep.	0	n.def.					0	n.def.
Other traffic	arr.+dep.	359	0.0%	922	6.5%				
Non-comercial traffic	arr.+dep.	541	6.7%	400	19.8%	2	#DIV/0!		
Ferry flights	arr.+dep.	452	4.4%						

for information only:	Air Cargo (t) abs.	Δ%
arr.+dep.+tr.	171,118	7.2%
arr.+dep. (acc. to ACI-definition)	166,360	6.0%

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.	430,436	12.6%	59,359,539	21.3%	1,890,253	-3.9%	41,043	-5.2%
	arriving	215,222	12.6%	29,800,033	21.3%	877,391	-4.5%	19,749	-7.5%
	departing	215,214	12.6%	29,490,429	21.6%	950,701	-5.4%	21,249	-3.2%
	arr.+dep.	430,436	12.6%	59,290,462	21.4%	1,828,092	-5.0%	40,998	-5.3%
	transit			69,077	-32.2%	62,161	48.2%	45	31.2%
Commercial traffic	arr.+dep.	423,764	13.3%	59,286,312	21.4%	1,827,909	-5.0%		
Scheduled/Charter	arr.+dep.	419,004	13.5%	59,273,843	21.5%	1,827,909	-5.0%		
	transit			69,077	-32.2%	62,161	48.2%		
Passenger flights	arr.+dep.	394,869	15.7%	59,273,843	21.5%	701,303	18.1%		
Freighter flights	arr.+dep.	24,135	-13.4%			1,126,606	-15.3%		
Mail flights	arr.+dep.	0	n.def.					0	n.def.
Other traffic	arr.+dep.	4,760	-1.6%	12,469	-5.2%				
Non-comercial traffic	arr.+dep.	6,672	-17.7%	4,150	-17.2%	183	>100%		
Ferry flights	arr.+dep.	5,386	-20.5%						

for information only:	Air Cargo (t) abs.	Δ%
arr.+dep.+tr.	1,931,296	-3.9%
arr.+dep. (acc. to ACI-definition)	1,869,090	-5.0%