

Brussels Airport

A Focus Gateway

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The Brussels Airport Company**

Airneth 6th Annual Conference
'Development of next generation hubs'
19 April 2012

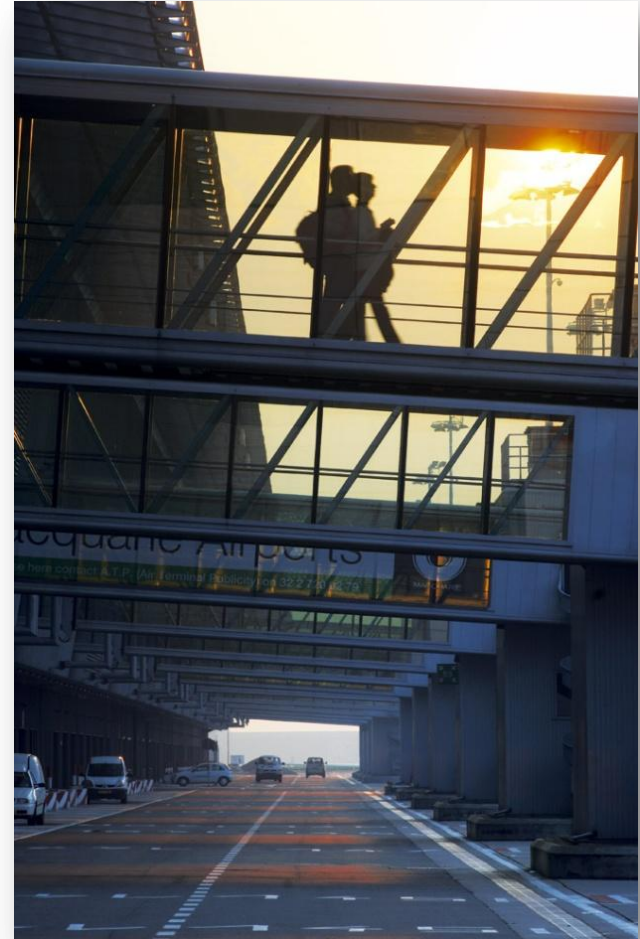


Presentation

- Brussels Airport

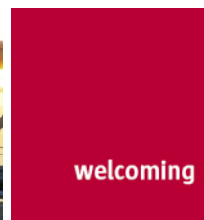
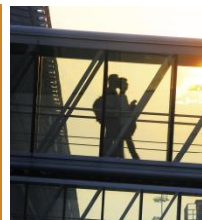
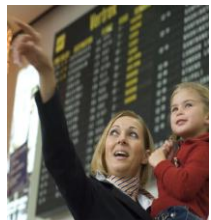
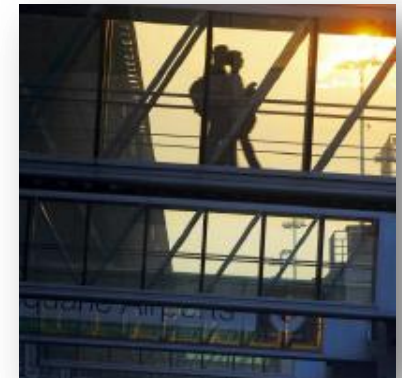
- Focus Gateway

- The Future



The Brussels Airport Company

- 1998 BIAC, merger of 'Regie der Luchtweegen' and BATC
- 2001 Home carrier Sabena collapses; launch of SNBA
- 2002 Opening of new 34 gate pier A, capacity up to 28m
- 2005 Privatisation BIAC: private shareholders 75% , Federal Government 25%;
- 2006 Airport rebrand: ***European, Efficient, Welcoming***
- 2007 Network and passenger traffic growth takes off again
- 2010 Star Alliance hub

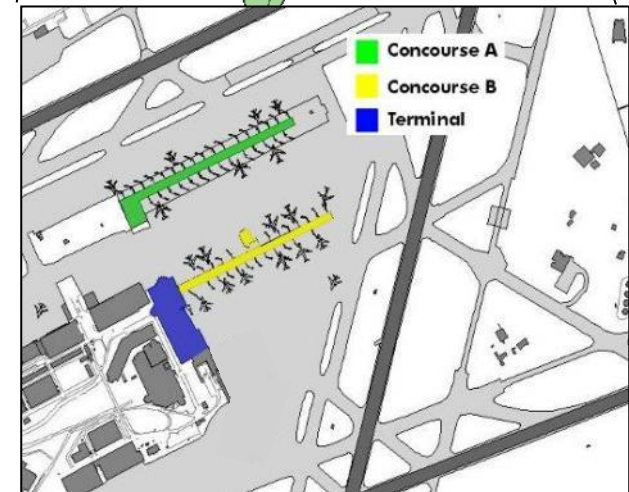
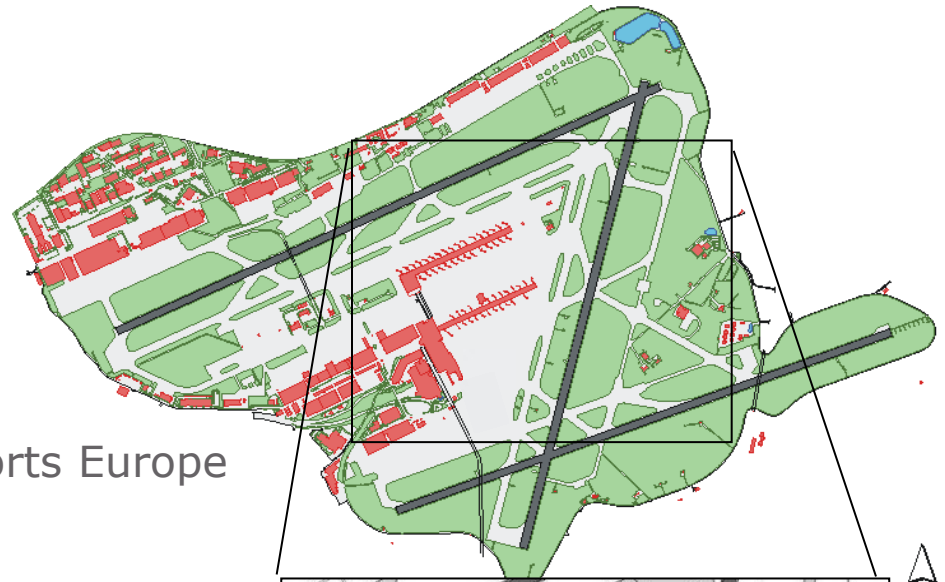


Brussels Airport: 50°54'08" N, 04°29'09" E



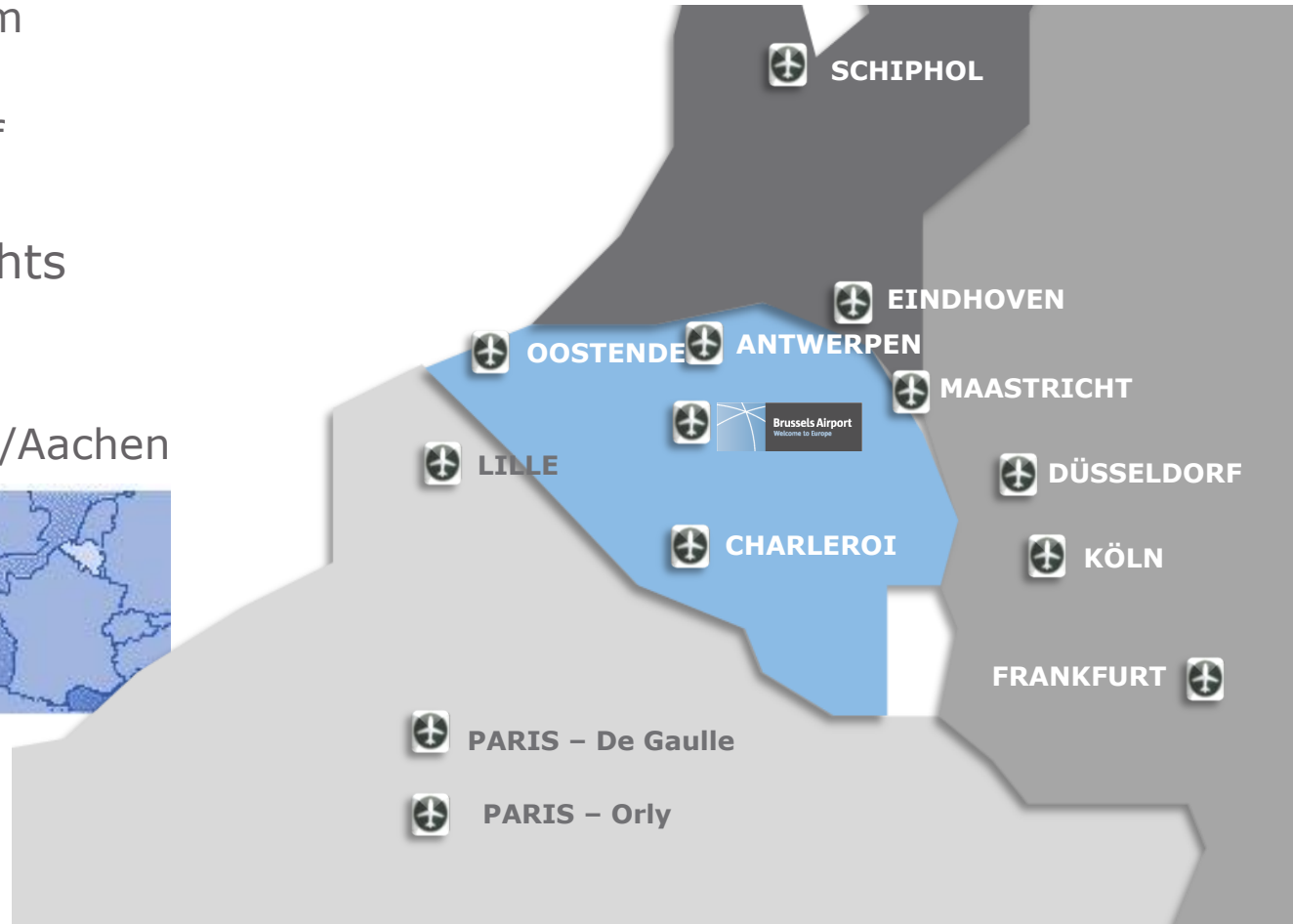
Brussels Airport today

- Runway capacity
 - **74** movements per hour
 - short taxi times
 - among most punctual airports Europe
- One terminal
 - Concourse A (Schengen & Africa)
 - Concourse B (non-Schengen)
 - **54** contact aircraft stands
 - 22 bus gates
 - 54 remote aircraft stands
 - 9 B747F aircraft stands at Brucargo



Located in the most competitive region of Europe

- Long haul flights
 - Amsterdam
 - Paris/CDG
 - Dusseldorf
 - Frankfurt
- Low cost flights
 - Charleroi
 - Eindhoven
 - Maastricht/Aachen



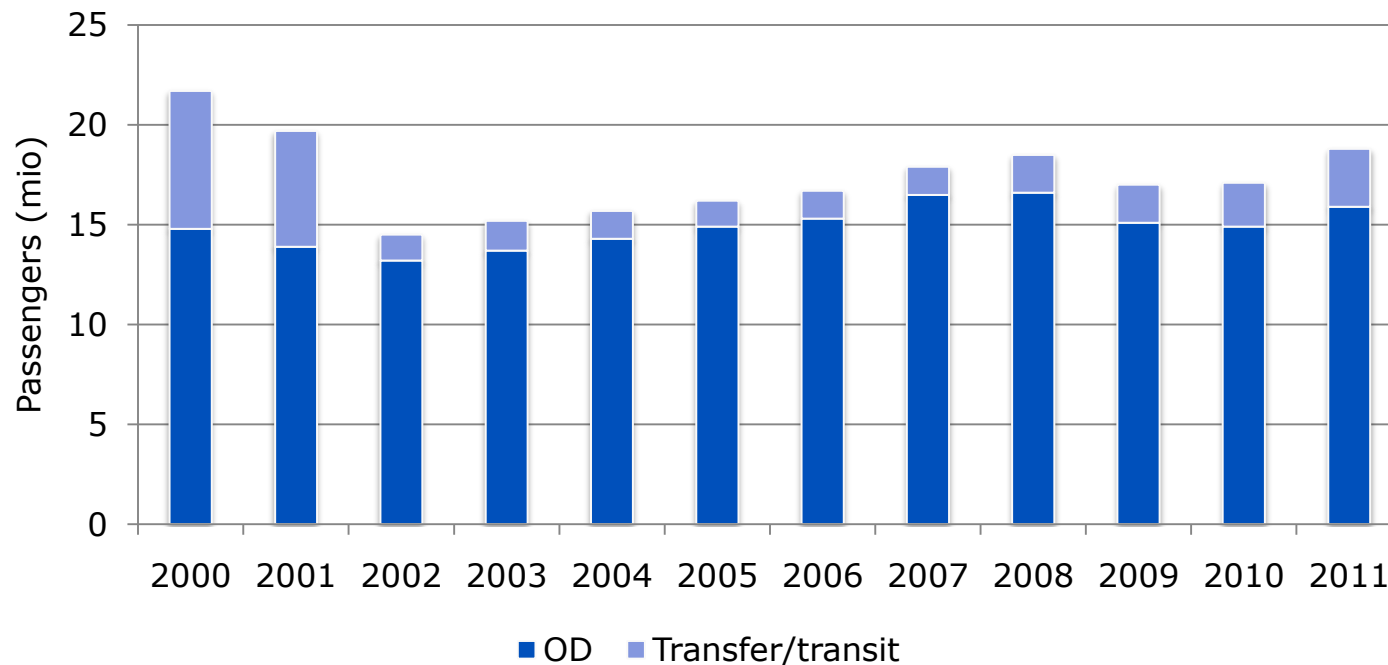
Catchment area of 20 million people

- Belgium: **11.1 million** population
- Cross border **8.1 million**
 - The Netherlands (south) 4.1 mio
 - France (north) 4 mio
- Belgium has one of the highest population **densities** in the world
 - Greater London 14 mio
 - Paris / Ile de France 11 mio
 - Ruhr area Germany 11 mio
 - Randstad Holland 7 mio

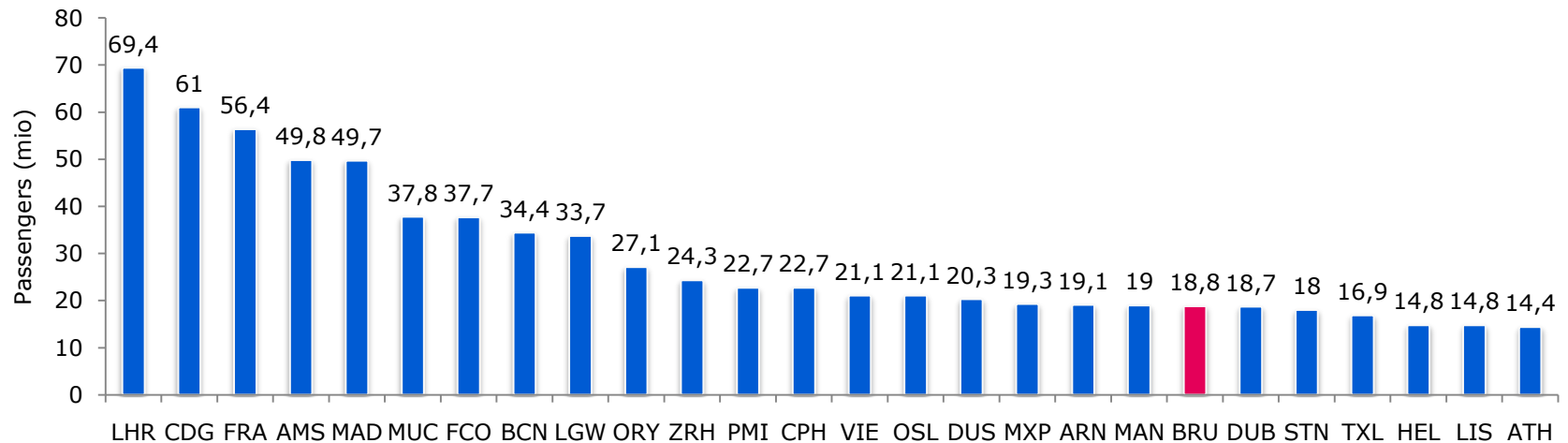
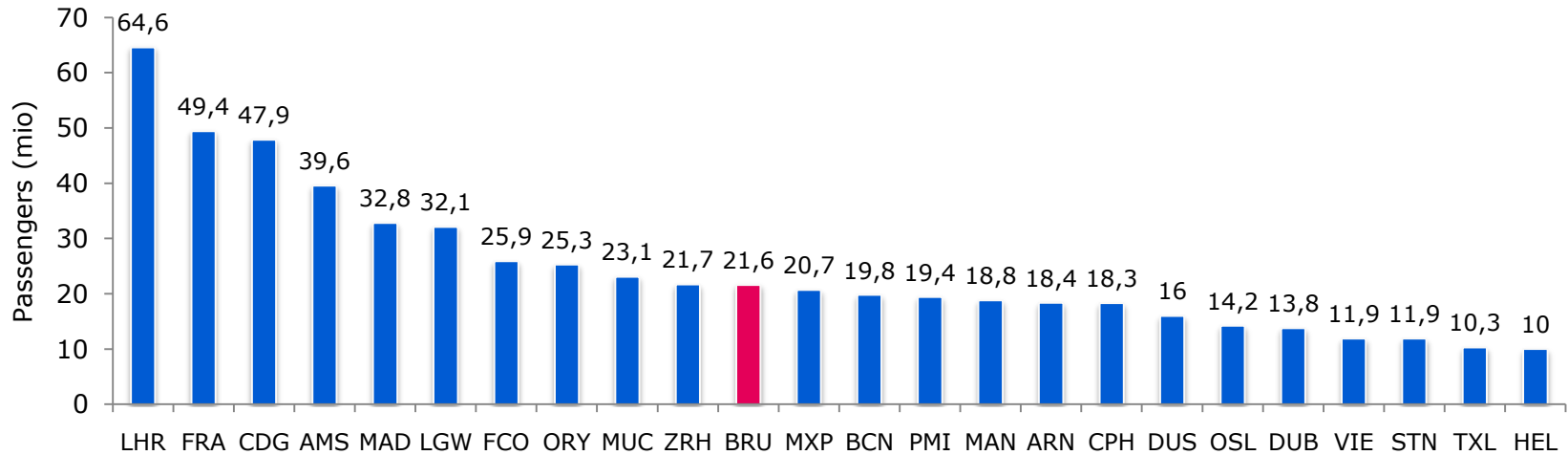


Brussels Airport traffic 2000 - 2011

- Collapse of **Sabena** October 2001; relaunched as Europe oriented SN Brussels Airlines by private investors
- Brussels Airport lost **80% of transfer** and 10% of OD travel in 2002
- OD travel has recovered
- Transfer travel in 2011 at **40% of the year 2000**



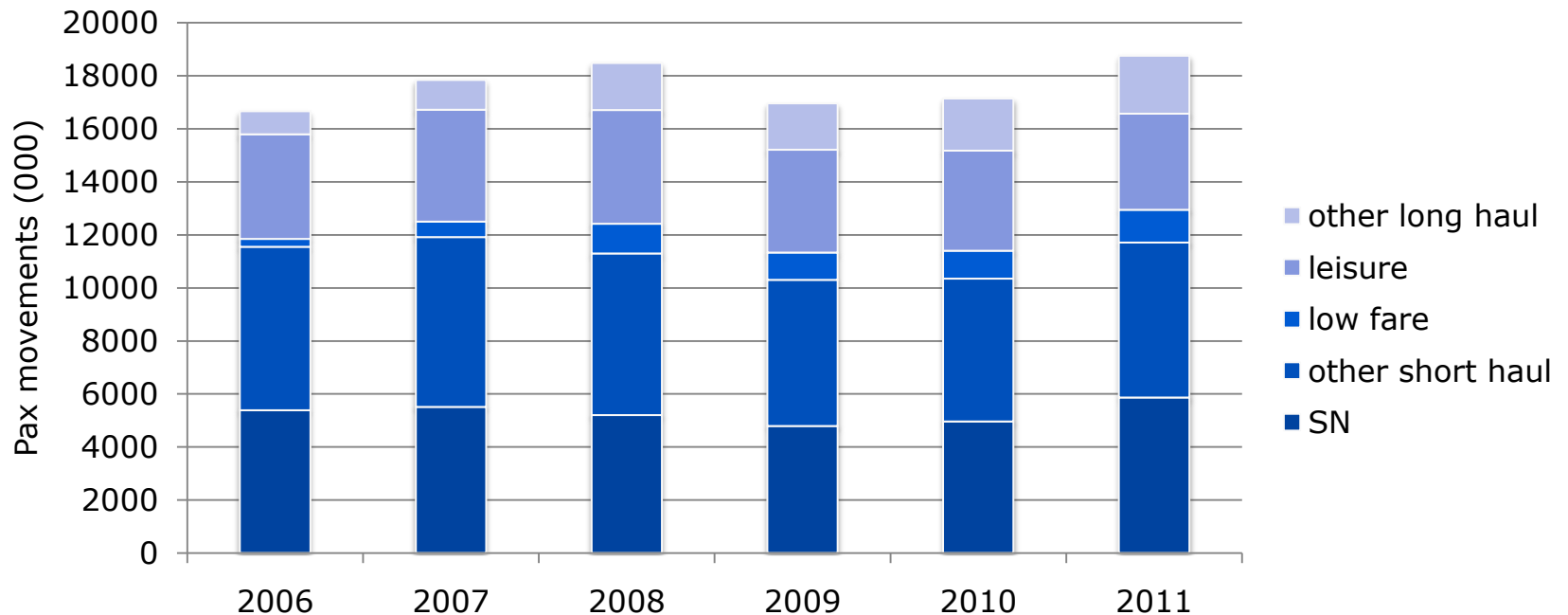
BRU no.11 in Europe in 2000; no.20 in 2011



Excludes Moscow and Istanbul

New aviation strategy 2007: strong growth

- Main segments:
 - Strong co-operation with **home carrier**, after merger with Virgin Express
 - Rebuild the **long haul** market from Belgium
 - Co-operation with the main **leisure** airlines Jetairfly and Thomas Cook A/I
 - Grow share of **low fare** travel; defend versus regional airports
 - European O&D travel: reduce traffic loss via other airports



Presentation

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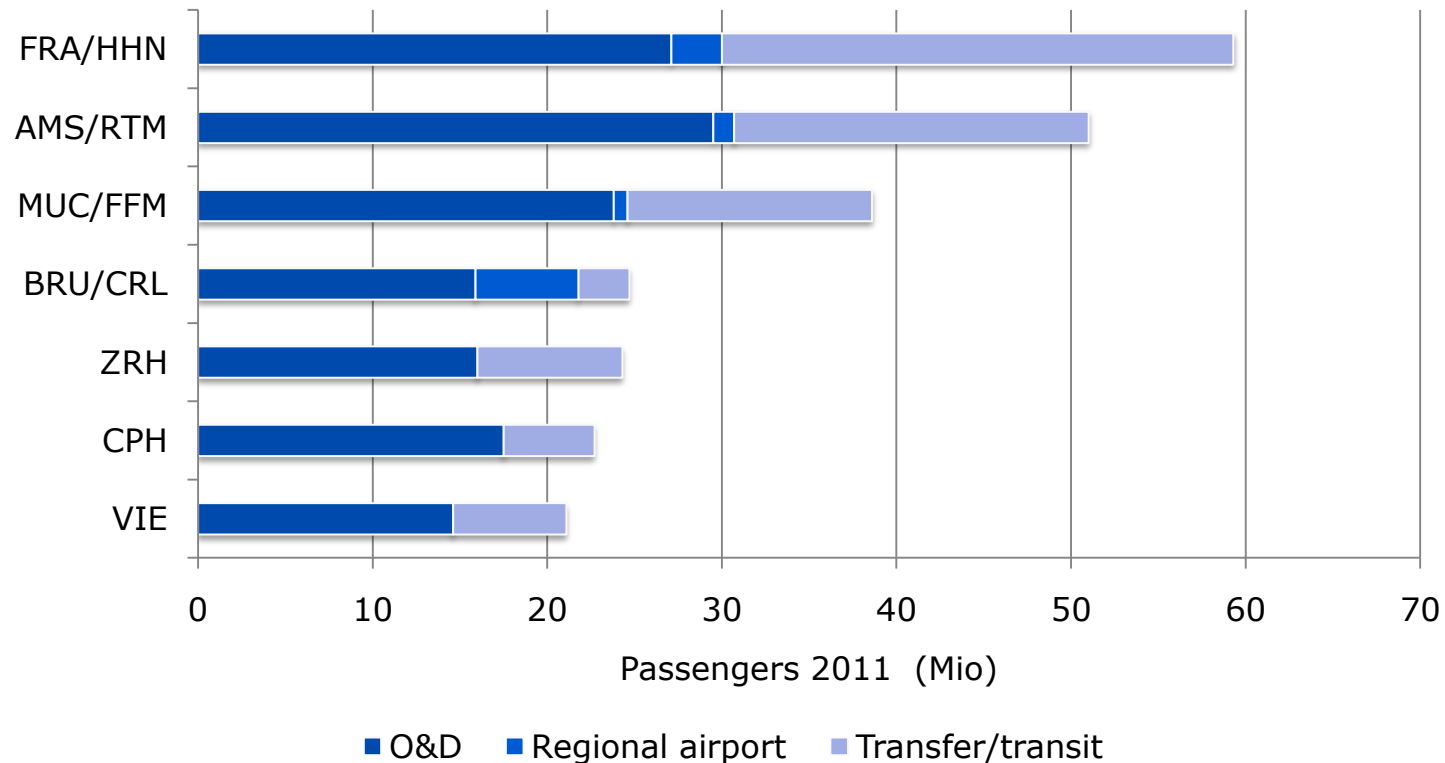
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Large O&D market around Brussels Airport

- A large O&D market is a sustainable basis to grow transfer travel



Source: airport websites

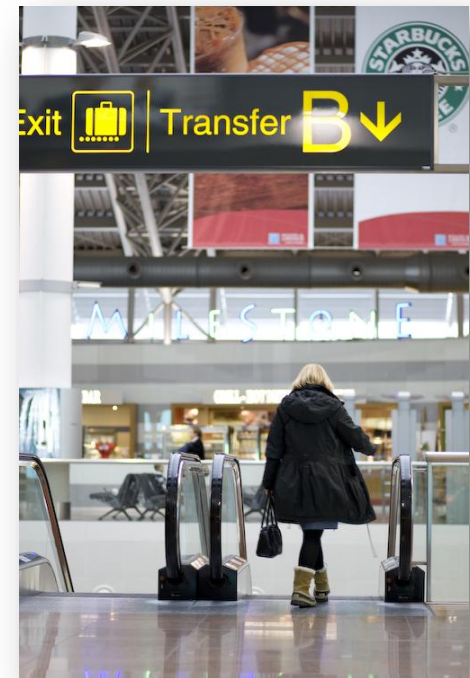
Worldwide hubs and focus gateways

Worldwide hubs

LHR	
FRA	
CDG	
AMS	
ZRH	Main gateways only
MUC	Main gateways only

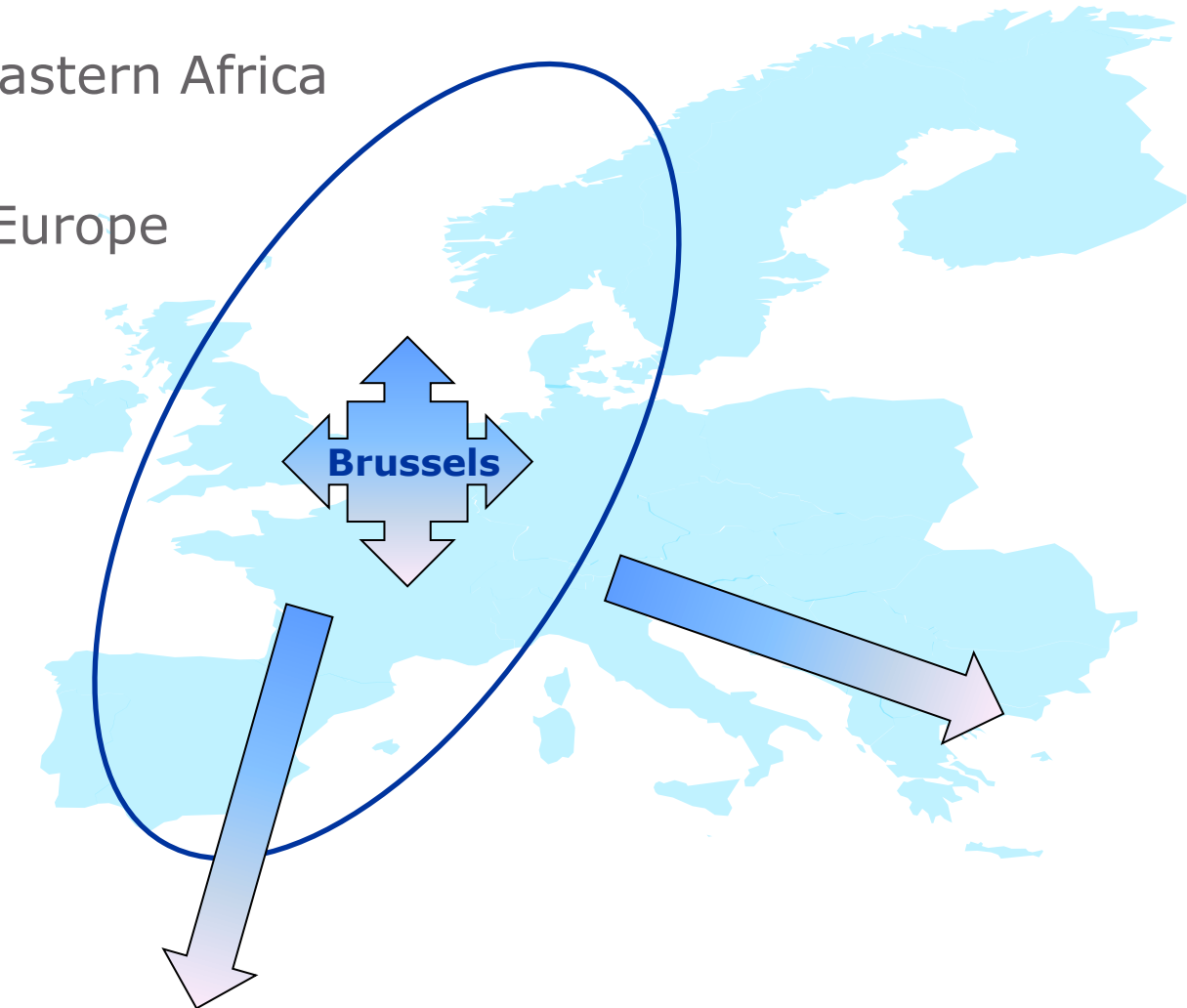
Focus gateways, examples

BRU	Africa, India, W-Europe
CPH	NE Asia, Nordic
VIE	Asia, Middle East, E-Europe
MAD	Latin America, Iberian peninsula
HEL	Asia, Nordic
LIS	Brazil, Africa



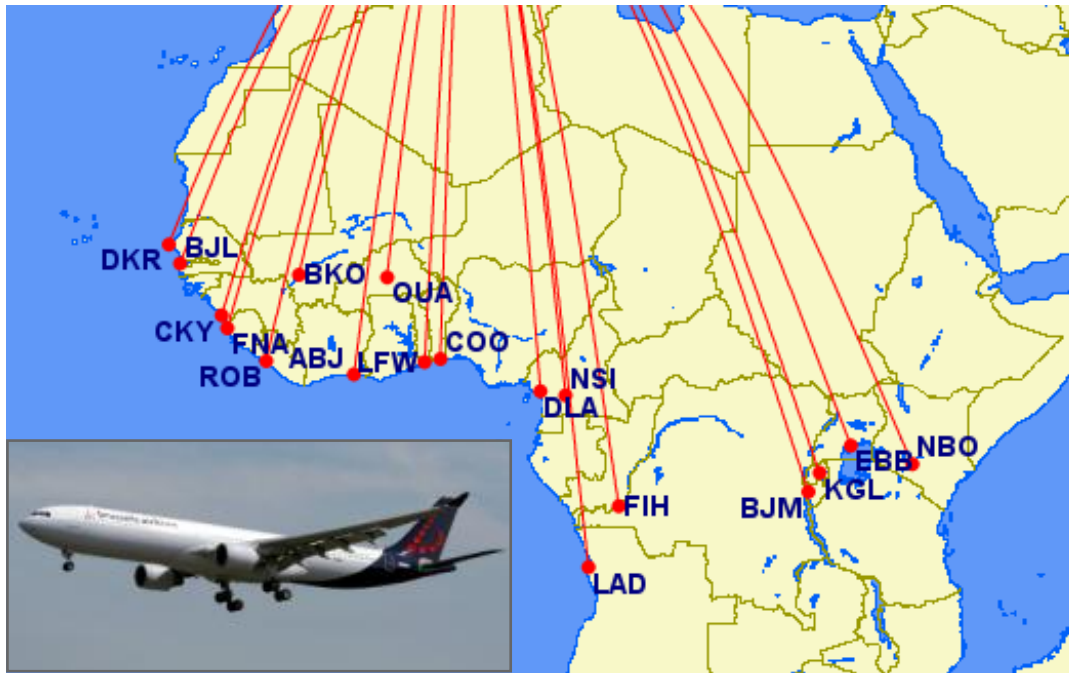
Focus gateway Brussels

1. Central/Eastern Africa
2. India
3. Western Europe



1. Central/Eastern Africa

- Network Brussels Airlines
 - 6 A330
 - 18 destinations, 37 weekly flights, 65 frequencies



	Frequencies
Abidjan	daily
Bamako	2/week
Banjul	4/week
Bujumbura	3/week
Conakry	2/week
Cotonou	2/week
Dakar	4/week
Douala	5/week
Entebbe	4/week
Freetown	2/week
Kigali	5/week
Kinshasa	daily
Lomé	2/week
Luanda	2/week
Monrovia	3/week
Nairobi	4/week
Ouagadougou	2/week
Yaoundé	5/week

1. Central/Eastern Africa – cont'd

- Leading role within Star Alliance for Brussels Airlines
 - Transfer from Europe, North America and Asia
 - Competition with extensive SkyTeam network Air France / KLM
- Weekly seats to Central Africa, 24-30 June 2012

Airline	Seats
Air France	21,500
Brussels Airlines	8,000
TAP Portugal	5,500
Lufthansa	5,300
KLM	4,900
British Airways	4,900
Virgin Atlantic	3,000
Iberia	2,600
Others	pm



4 NEW AFRICAN DESTINATIONS
SOUNDS GOOD

Lomé (Togo) Cotonou (Benin) Ouagadougou (Burkina Faso) Accra (Ghana)

brusselsairlines.com

Our African network now covers 18 destinations

brussels airlines
A STAR ALLIANCE MEMBER

2. India

- Jet Airways 'scissor hub'
 - 6 daily flights 08.00h – 10.00h
 - Delhi, Mumbai, Chennai / JFK, Newark, Toronto
 - Ongoing planning for expansion
 - Over 800,000 passengers per year



2. India – cont'd

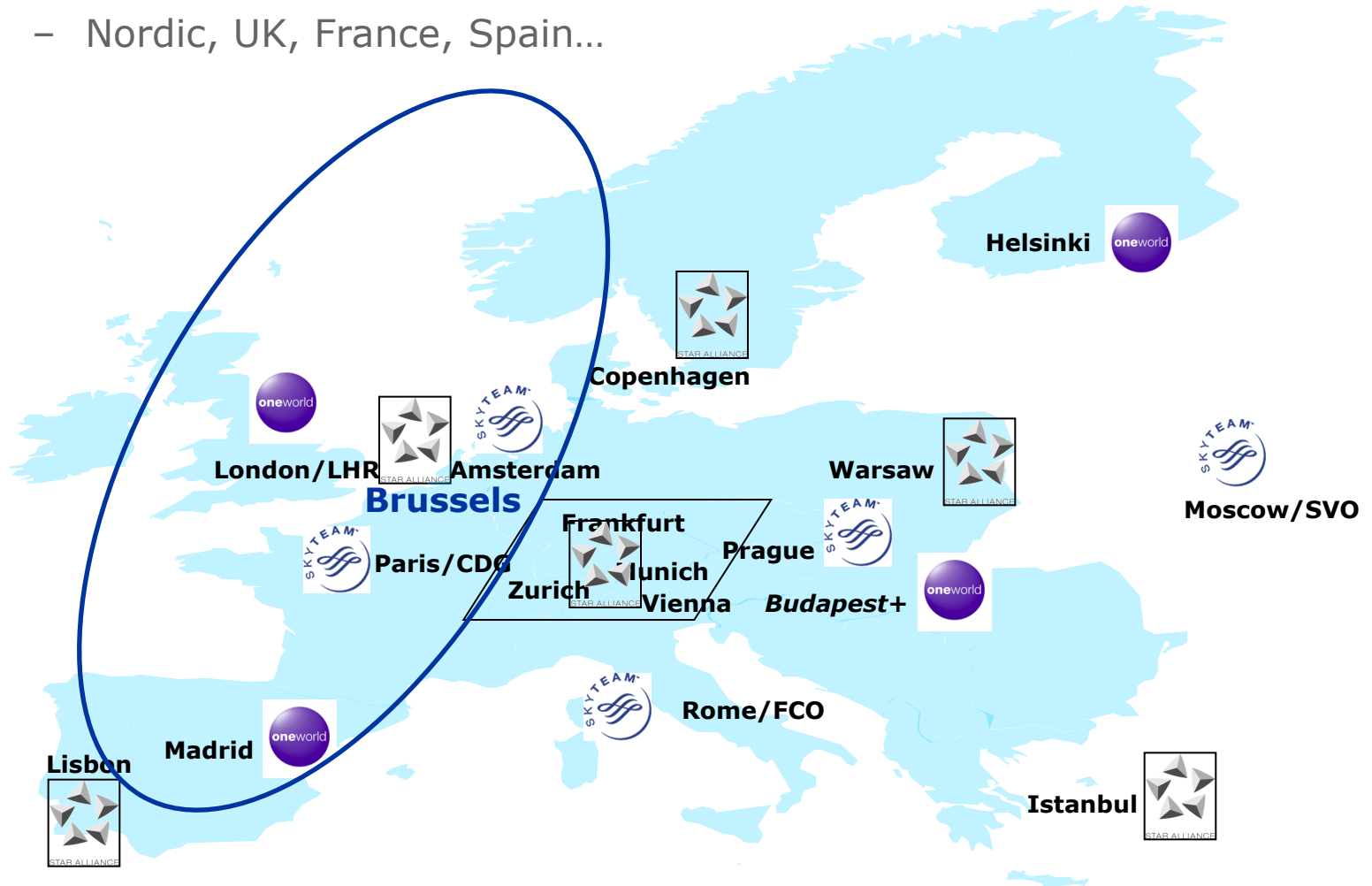
- Jet Airways is the leading airline between Europe and India
 - Operations from Brussels, London Heathrow and Milan/MXP
- Weekly seats Europe – India, 24-30 June 2012

Airline	Seats
Jet Airways	13,100
Lufthansa	12,600
British Airways	9,800
Air India	7,400
Air France	4,300
Swiss	3,300
Kingfisher *	3,000
KLM	2,000
Finnair	1,600
Virgin Atlantic	1,500
Austrian	1,400
Others	pm



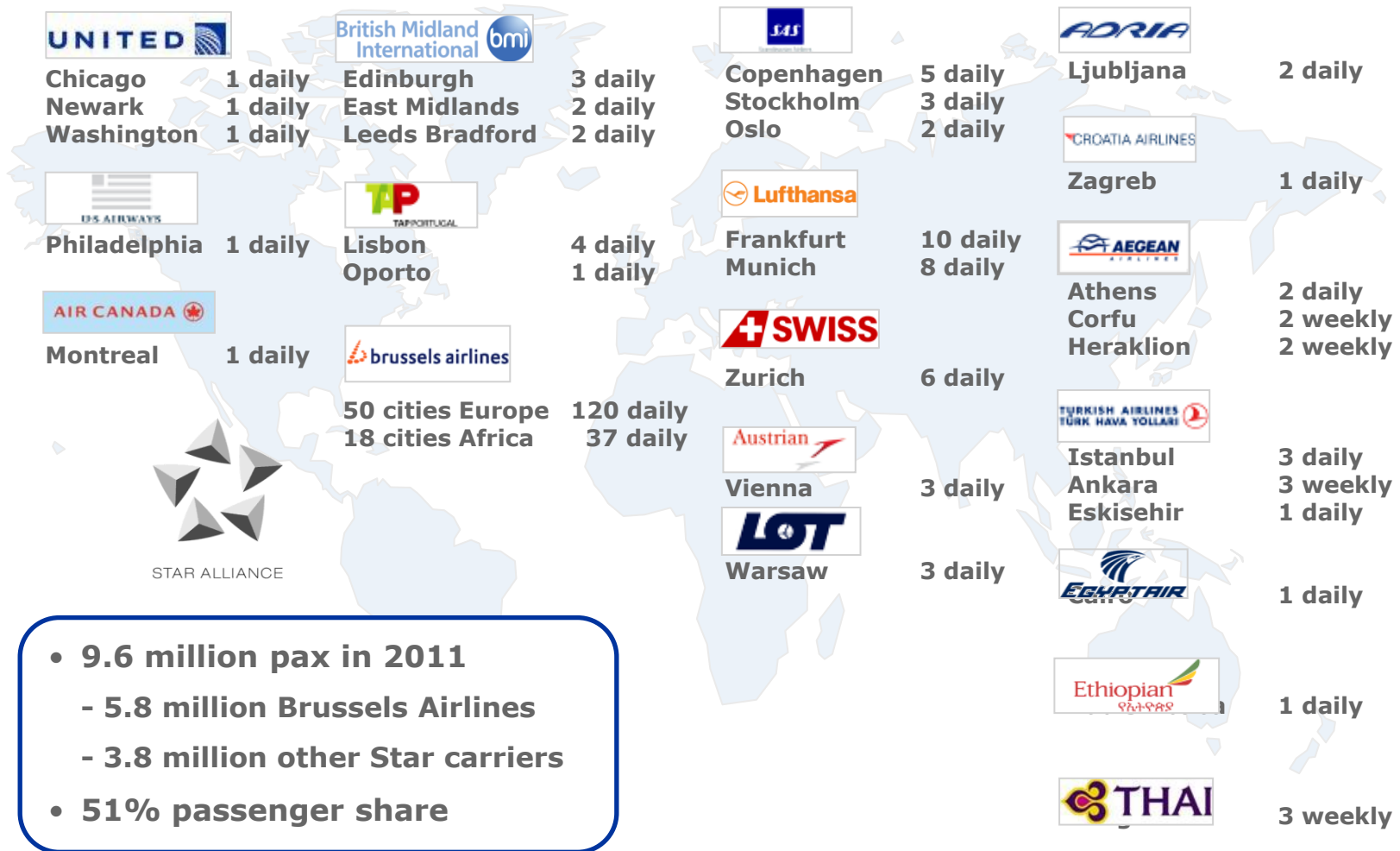
3. Western Europe

- Star Alliance gateway for Western Europe
 - Nordic, UK, France, Spain...



3. Western Europe – cont'd

- 18 Star Alliance carriers at Brussels Airport



- 9.6 million pax in 2011
 - 5.8 million Brussels Airlines
 - 3.8 million other Star carriers
- 51% passenger share

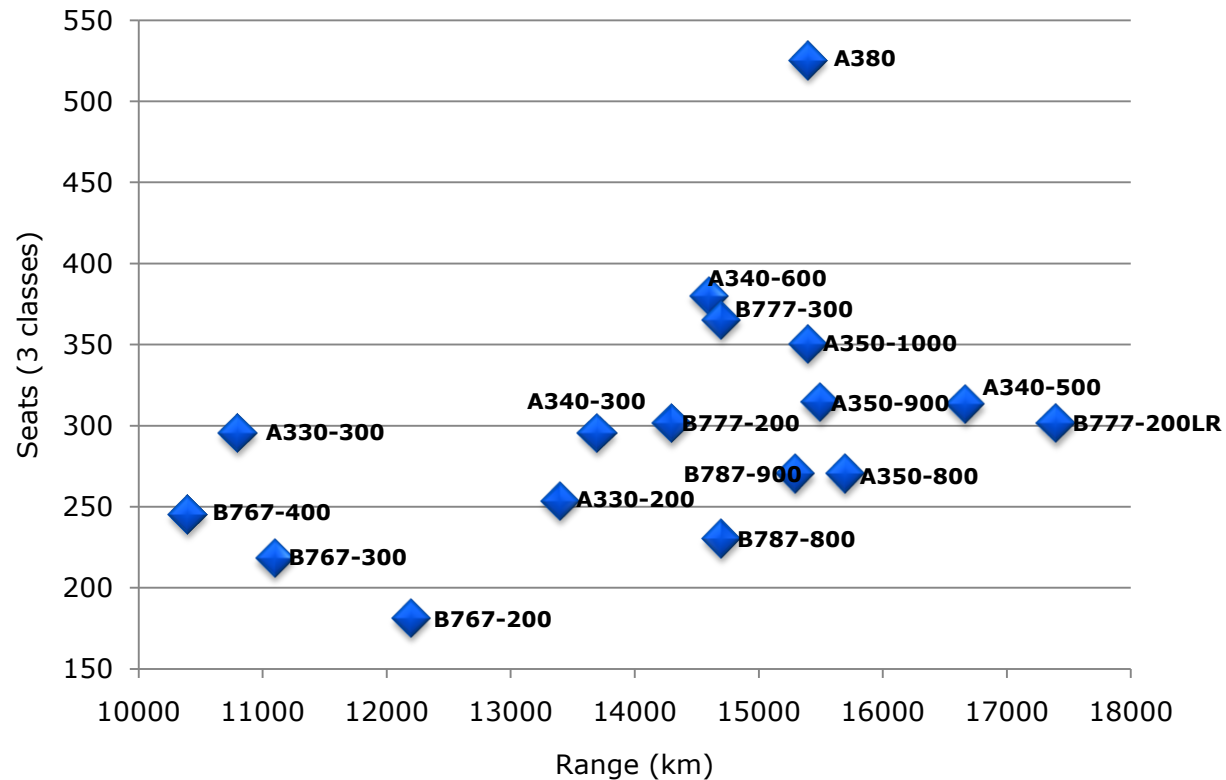
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New generation long haul aircraft support focus gateway development

- Concentration at world hubs: A380, B747-8I
- Fragmentation via focus gateways: A350, B777, B787

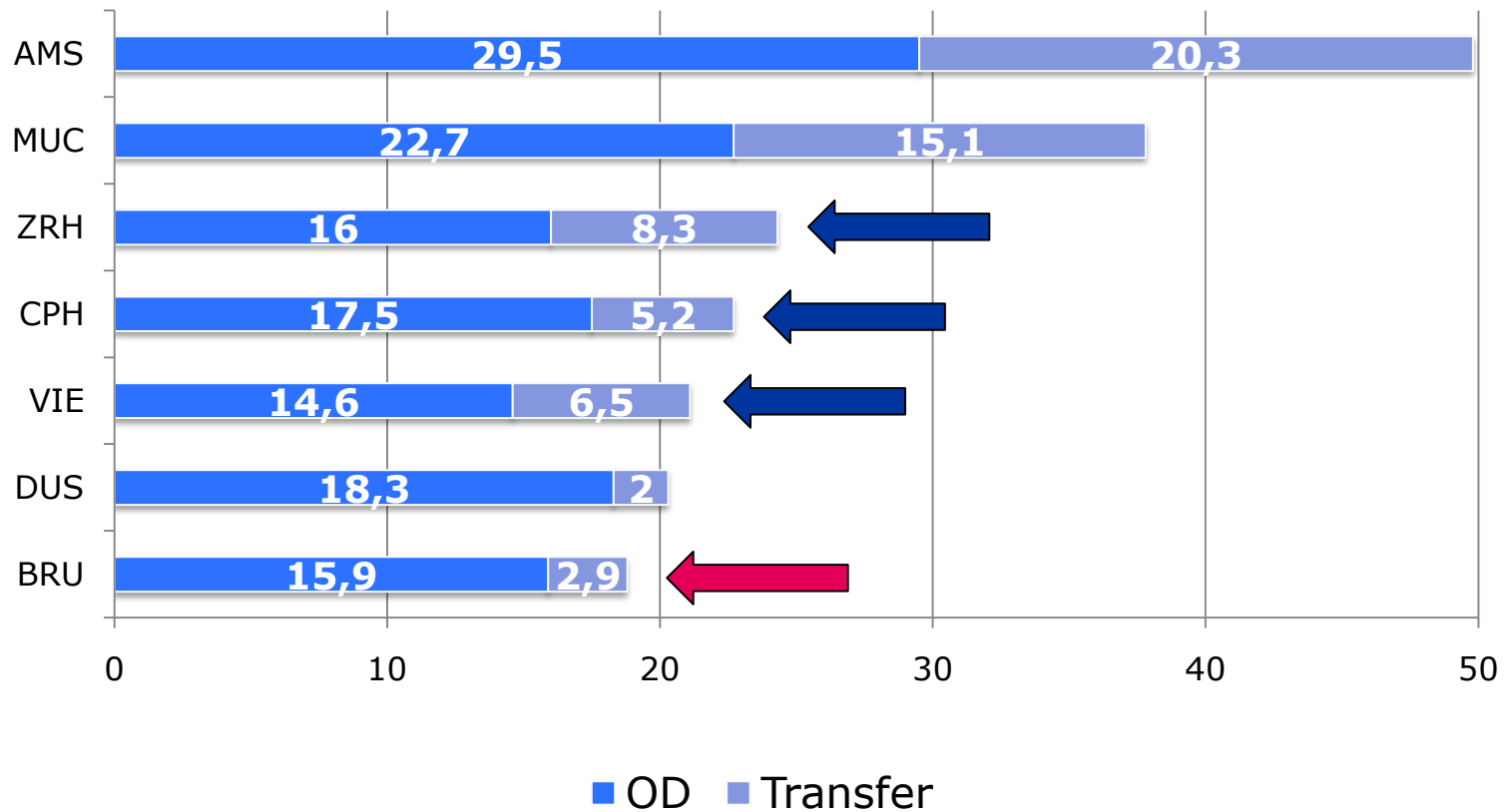


Network development Brussels Airport as a focus gateway

- Africa
 - Brussels Airlines: grow frequencies and expand network to Central & Eastern Africa
- North America
 - Star Alliance & Brussels Airlines: grow frequencies and aircraft size; expand network
- Western Europe feed
 - Brussels Airlines & Star Alliance: grow network Europe
- Star Alliance long haul
 - Current and new airlines



Grow transfer at Brussels to peer Star Alliance airports share



Source: airport websites

Airport experience: shopping

- 58 retail and service outlets

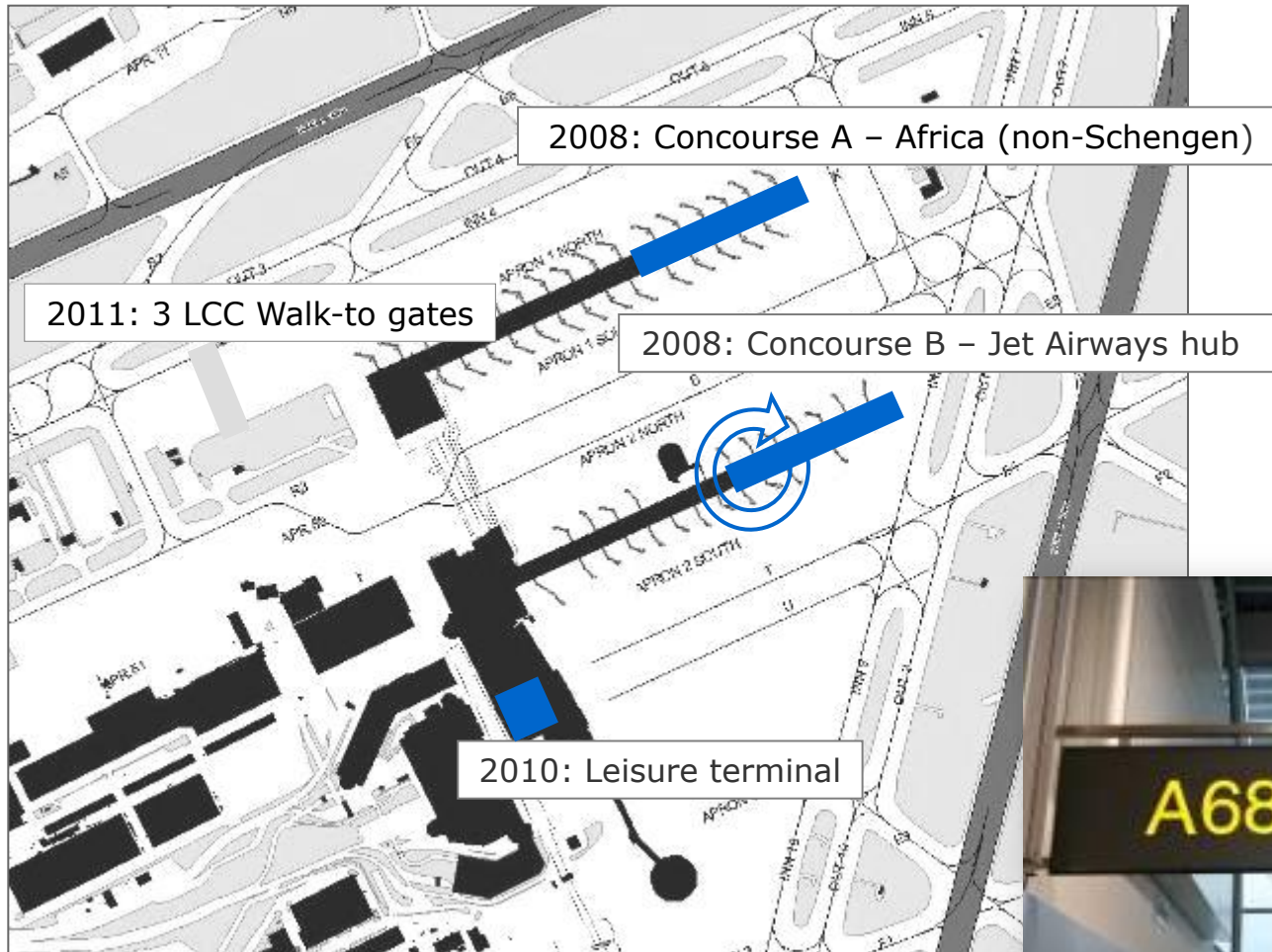


Airport experience: food & beverage

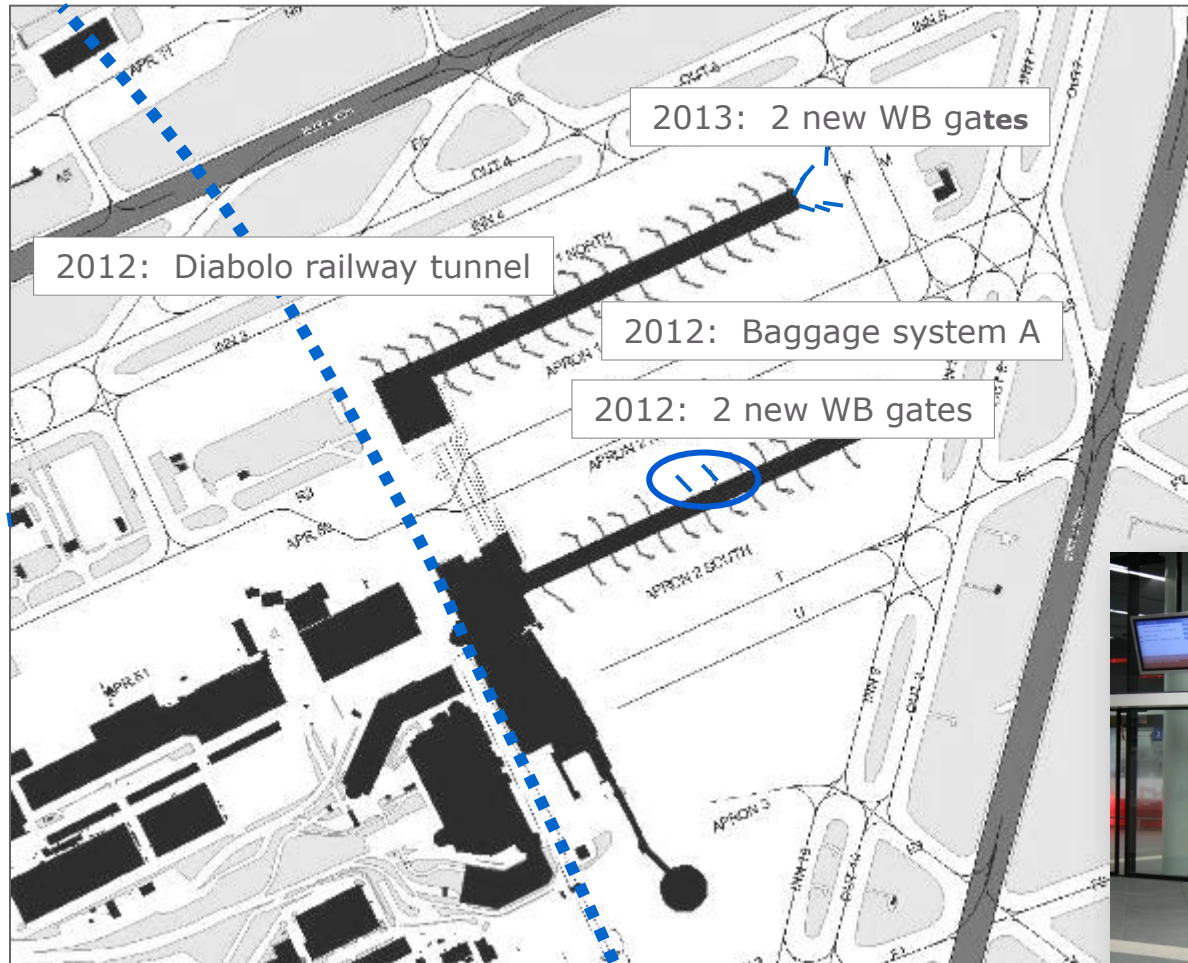
- 29 food & beverage outlets



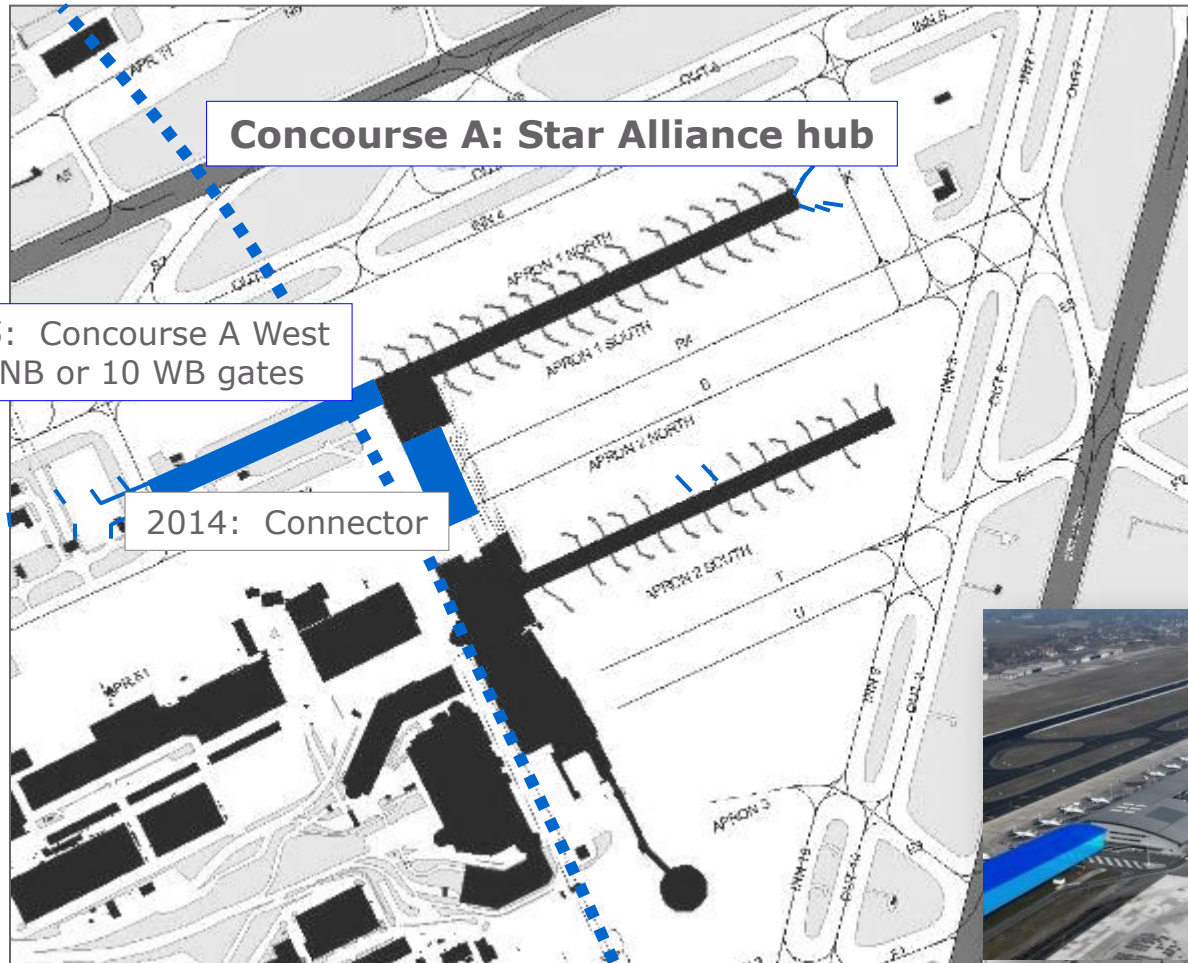
Airport development 2008-2011



Airport development 2012-2013



Airport development 2014-2015



Connector design

- New airport landmark
- Reduced MCT
- Shopping and F&B
- Centralized security

