

Press kit

Mérignac, 9 January 2018

2018 OVERVIEW

With 6.8 million passengers and a +9.3% traffic increase, Bordeaux Airport wraps up a ninth year of consecutive growth.

Bordeaux Airport ended 2018 by setting a **new traffic record with 6,799,572 passengers**, just one year after reaching the symbolic milestone of 6 million passengers carried. With 576,000 additional passengers, **2018 was the airport's best year on record**. By the summer of 2018, the number of passengers had doubled compared to 2009, heralding a **9th year of continuous growth**. For traffic on routes to Paris (Orly and Charles-de-Gaulle) alone, given the context of targeted SNCF competition on the high-speed train line, **Bordeaux Airport grew by +17.8%** (or 839,000 additional passengers), which is the **best growth since the creation of the airport company**.

This exceptional dynamism was buoyed by the **powerful international market of nearly 3,800,000 passengers**, i.e. more than half of all passengers for an increase of **+21.2%**. This exponential growth is driven to a large extent by **low-cost flights**, which continue to progress and achieved a **record growth rate of +22.1%**. This tremendous dynamism is reported by all low-cost operators, mainly easyJet, which confirmed its leading position by establishing a long-term base in Bordeaux last spring.

At the height of the summer season, Bordeaux Airport served an unprecedented **99 direct destinations, including 27 new destinations**. All these routes are operated by **31 airlines**, including two new airlines in 2018: SWISS and Air Baltic. The **international expansion** of routes from Bordeaux is a long-term process and **in 2018 represented 80% of new routes**. The intercontinental hubs are getting stronger. Air France has maintained its six daily flights to Paris Charles-de-Gaulle and 10 daily flights to Paris-Orly. The Lufthansa Group is continuing its development strategy in the Frankfurt, Zurich and Brussels hubs. With over 13 international direct flight platforms, connecting travel from Bordeaux is becoming increasingly efficient.

Nevertheless, the number of aircraft movements increased by only **4%** this year, another illustration that growth is driven by high-capacity aircraft (150 - 200 seats).

In view of these major successes, 2018 is the pivotal year of a plan to improve the quality of service and infrastructures at the airport over the next five years, supported by a €140 million investment programme.



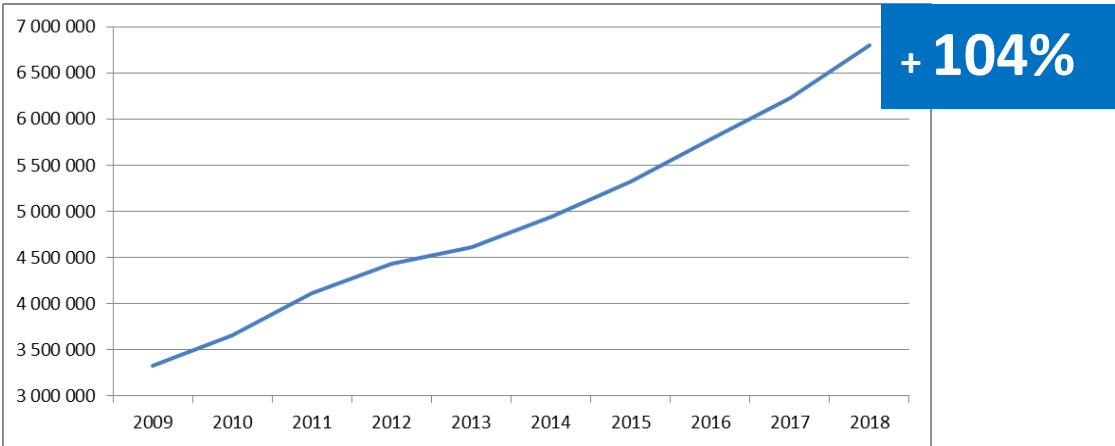
STRONG AND SOLID GROWTH

6.8 million passengers passed through Bordeaux Airport in 2018, carried by **31 airlines**. Total traffic growth shot up by **+9.3%** compared to last year. International flights continued to predominate with growth of **+21.2%**, or **3,800,000 passengers**.

Passenger traffic in 2018

	Number of passengers	2017/2018 change
National	2,955,936	-2.2%
International	3,824,328	21.2%
Total	6,799,572	9.3%
Low-cost	3,751,042	22.1%

Passenger traffic progression 2009 - 2018

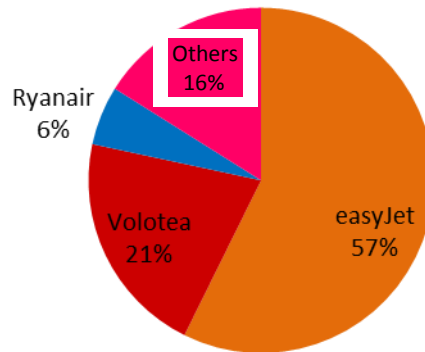


THE LOW-COST FLIGHT MARKET CONTINUES TO SOAR

With 3,750,000 passengers, **low-cost flights accounted for more than half of total traffic in 2018**. They also recorded exceptional growth of **+22.1% in traffic** and contributed to **80% of the annual growth** (growth outside Paris).



Low-cost airlines' contribution to overall low-cost growth



easyJet cornered over 30% of the global market share and 57% of the low-cost market from Bordeaux with 2,150,000 passengers carried, an increase of 22% compared to 2017. It confirmed its position as the airport's leading airline in terms of number of destinations offered, with 33 direct routes at the peak of the 2018 season. For 2019, it is also announcing the arrival of a fourth aircraft and four new destinations. The orange-liveried airline has become a key player in the regional economy in terms of employment and tourism.

Volotea followed suit by posting record growth throughout the entire low-cost market with +29.5% in traffic and holds 17% of the low-cost market. In 2018 the Spanish airline carried nearly 630,000 passengers to around 30 destinations. In light of this success, it is also announcing the arrival of a fourth Bordeaux-based aircraft and three new routes for 2019.

Ryanair is the third largest Bordeaux low-cost market operator with nearly ½ million passengers over the year and growth of +8.9%. The airline is also announcing the establishment of a Bordeaux base for 2019 and the opening of 17 new destinations.

Other low-cost airlines continue to develop in the same spirit. **Wizz Air**, after arriving in Bordeaux in 2017, opened a second route to Warsaw last spring. **Vueling Airlines** recorded a substantial traffic increase of +27.% at the end of the year. **Blue Air**, which serves Bucharest, doubled its passenger numbers in one year.

Worth noting! The Billi simplified services terminal accounts for more than 39% of the airport's market, achieving growth of 21% in relation to 2017.



INTERNATIONAL TRAFFIC GROWTH AT ITS HEIGHT

International traffic confirmed its ascendancy with a +21.2% increase, corresponding to 3,800,000 passengers carried in 2018.

Europe accounted for nearly 3 million passengers in Bordeaux in 2018 and numbers increased by +22.3% compared to 2017. It was boosted by the opening of many new routes: Warsaw, Luxembourg, Riga, London Southend, Valencia, Manchester.... Note the significant development of **Eastern European** countries, which excellent results.

Services to the **Iberian Peninsula** lead the way with nearly 850,000 passengers.

Spain recorded growth of +33%: Ibiza (+206%), Alicante (+72.1%), Madrid (+25.1%), Barcelona (+23.2%).

The most impressive improvement of the year came from **Germany** with +67% growth and 175,700 passengers: Frankfurt (+230%), Hamburg (+55%), Munich (+35%), Berlin (+13.50%).

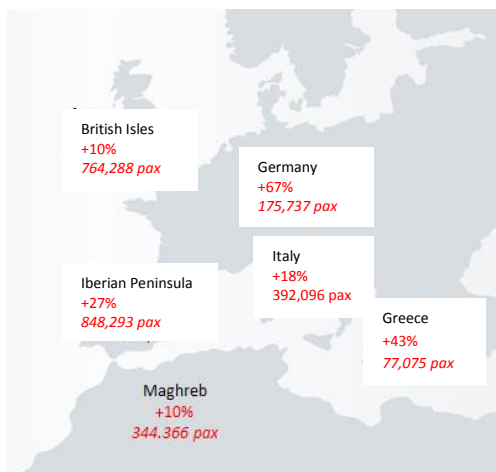
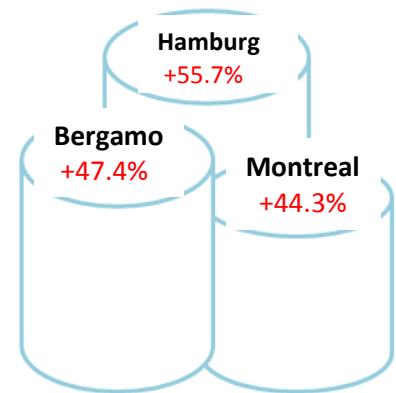
Greece continues to attract tourists with growth of +43% or 77,000 passengers. Heraklion was the most popular destination this summer (+31%).

Italy posted an 18% rise in traffic with nearly 400,000 passengers.

The British Isles continued to develop with a 10% rise. London, served by three airlines (British Airways, easyJet and Ryanair) to four airports, ended the year with +8% growth and 500,000 passengers carried.

The Maghreb countries, which hosted four new routes in 2018 (Essaouira with easyJet and Marrakesh, Fez with Ryanair and Oran with ASL), look promising with a +10% traffic increase.

Top 3 growth rates in 2018
(calculated in relation to the top 50 destinations in volume terms)



Growth rates and sizes of the main markets in 2018 (excluding domestic)



NEARLY 3 MILLION DOMESTIC PASSENGERS

Domestic traffic recorded **2,940,000 passengers in 2018** and a 2.3% decline in growth.

The Paris-bound market (-17.3%) had a strong impact on domestic traffic, which nevertheless saw the return of positive monthly results from June 2018 through to the end of the year.

Cross-country routes **grew by +13% overall**: Nice and Marseille were the big winners in terms of numbers, with 57,000 additional passengers (+28.7%) and 32,000 (+10.8%) respectively. Corsica leads the growth ranking with +29%: Calvi (+164%), Bastia (+42.3%), Figari (+25.3%) and Ajaccio (+18.4%).

2018 RECORDS

- ⇒ Record day – 9 July: 28,000 passengers
- ⇒ Record week – week of 9 to 15 July: 168,000 passengers
- ⇒ Record month – July: 737,580 passengers = +70,500 passengers compared to July 2017

A DYNAMIC NETWORK OF DESTINATIONS

MORE THAN 100 DESTINATIONS OFFERED IN 2018

At the height of the season, **99 direct destinations and 132 air routes** were served by **31 regular airlines**. This coverage was boosted by **17 charter destinations**.

27 new routes were launched, including **16 new destinations and 11 competing routes**, representing **52% of annual net growth** in 2018, corresponding to 300,000 passengers.

Certain seasonal destinations were added to the Winter programme: Frankfurt, Zurich, Caen, Athens (over the Christmas period), Palma and Malta.

27 New destinations in 2018

Fort de France	<i>XL Airways</i>	Rhodes	<i>easyJet</i>	Toulon	<i>ASL</i>
Warsaw	<i>Wizzair</i>	Minorca	<i>Volotea</i>	London Sthd	<i>easyJet</i>
Zurich	<i>Swiss</i>	Cagliari	<i>Volotea</i>	Valencia	<i>Ryanair</i>
Funchal	<i>Volotea</i>	Riga	<i>Air Baltic</i>	Fez	<i>Ryanair</i>
Calvi	<i>Hop!</i>	Strasbourg	<i>ASL</i>	Marrakesh	<i>Ryanair</i>
Catania	<i>easyJet</i>	Bastia	<i>easyJet</i>	Essaouira	<i>easyJet</i>
Luxembourg	<i>easyJet</i>	Ibiza	<i>easyJet</i>	Manchester	<i>easyJet</i>
Faro	<i>easyJet</i>	Heraklion	<i>easyJet</i>	Lanzarote	<i>Volotea</i>
Tel Aviv	<i>easyJet</i>	Oran	<i>ASL</i>	Caen	<i>Chalair</i>



TWO NEW AIRLINES IN 2018

The Lufthansa Group airline, **SWISS**, will be based in Bordeaux from March 2018. This new route offers a direct flight to Zurich but is also a gateway to the global **Swiss International Air Lines** network, with some 130 destinations to more than 40 countries.

Air Baltic, the main Baltic States airline, arrived on the Bordeaux-Riga (Latvian capital) route in June. This airline was one of the most punctual worldwide in 2017. It will enable numerous connections to the Baltic countries, Scandinavia and Russia.

THE AIR FRANCE GROUP CONFIRMS ITS PRESENCE IN BORDEAUX

In response to the arrival of the high-speed train line in July 2017, Air France and HOP! Have consolidated their offerings from Bordeaux with nearly 2 million passengers carried in 2018. **The Paris-Orly shuttle** continues to operate its **10 daily flights**, in addition to **six daily flights to Paris Charles-de-Gaulle**. The group is adding two extra **Bordeaux-Marseille** flights and two new destinations in the summer of 2018, **Calvi and Düsseldorf**.

HUBS GROWING STRONGER

Bordeaux Airport has 13 international connection platforms enabling access to direct flights. Several new developments concerned these hubs in 2018:

- From May 2018, **Aer Lingus** provided fast Bordeaux-United States connections to 11 cities in North America via Dublin. The Irish airline allows passengers to complete their American immigration formalities in Dublin during transit – a real boon which facilitates entry into the United States.
- **Lufthansa Group** pursued its development strategy in Bordeaux to meet strong demand. In 2018, Star Alliance reinforced its presence with 17 new departures on the **Lufthansa and SWISS** flight schedules: Bordeaux-Frankfurt (7 flights/week) and Bordeaux-Zurich (12 flights/week). **Brussel Airlines** offered a sixth flight to Brussels, putting hundreds of additional connections within easy reach of Nouvelle Aquitaine residents. These three airlines accounted for **75% of the growth of non-low cost traffic**.
- **Air France** confirmed its six flights a day to Paris Charles-de-Gaulle.
- **Air Transat** added a third flight to the Montreal hub.

SPECIAL FLIGHTS

The destinations network is expanded each year with the addition of charter flights serving even more countries directly from Bordeaux. In 2018, these special, ad-hoc flights allowed Nouvelle-Aquitaine residents to discover **Lapland** on a tour organised by La Française des Circuits, **Bulgaria** through Top of Travel and **Cape Verde** with Héliades. All charter flights can be found at travel agencies.



Top 10 regular destinations			
	<i>Destination</i>	<i>Nbr Passengers</i>	<i>2018 growth</i>
	Paris	1,257,573	-17.2%
	Lyon	560,894	5.8%
	Marseille	327,291	10.7%
	Amsterdam	308,958	0.9%
	London Gatwick	308,191	5.8%
	Nice	258,939	29.3%
	Geneva	208,275	1.1%
	Barcelona	199,079	23.2%
	Lille	180,901	20.6%
	Lisbon	178,813	5.8%

Top 10 low-cost destinations			
	<i>Low-cost destination</i>	<i>Nbr Passengers</i>	<i>2018 growth</i>
	Lyon	290,727	9.7%
	Geneva	207,641	0.9%
	Barcelona	198,842	23.3%
	London-Gatwick	187,346	4.2%
	Nice	183,652	33.2%
	Lisbon	124,186	3.8%
	Marseille	121,317	39.6%
	Basel	121,174	4.5%
	Strasbourg	109,345	29.6%
	London Stansted	93,128	11.3%

Market share			
<i>Airline or group</i>	<i>Market share</i>	<i>Nbr Passengers</i>	<i>2017/2018 change</i>
AIR FRANCE/KLM HOPI	32.7%	2,214,410	-10.3%
EASYJET	31.8%	2,157,119	22%
VOLOTEA AIRLINES	9.3%	627,566	29.5%
IAG BRITISH AIRLINES / AER LINGUS / IBERIA / IBERIA EXPRESS / VUELING	6.9%	470,301	20.7%
RYANAIR LTD	6.8%	461,157	8.9%
STAR ALLIANCE LUFTHANSA / SWISS / BRUSSELS AIRLINES	2.5%	169,566	243.2%
TUI AIRLINES BELGIUM	1.2%	80,861	-8%
ROYAL AIR MAROC	1.2%	78,073	-8.9%
TAP AIR PORTUGAL	0.8%	54,329	10.8%
AIR ALGERIE	0.7%	48,291	-1.5%

BORDEAUX AIRPORT, A POWERFUL ECONOMIC PLAYER

HIGH-PROFILE ONLINE VISIBILITY

Hits on the bordeaux.aeroport.fr website increased significantly by **+14.3%**, or **3.8 million sessions** and **more than 2 million internet users** sought information on destinations, flight schedules and airport services online in 2018.



Since August 1, 2018, bordeaux.aeroport.fr has been offering a **flight comparison service** in partnership with Easyvoyage, facilitating travel choices for all direct flights and also offering the best connections via international hubs served from Bordeaux.

EN ROUTE TO THE GREAT ECONOMIC AND SERVICE CENTRE OF THE FUTURE

Bordeaux Airport's investment programme for 2023 covers six main infrastructure and service development priorities [**details to be announced at a forthcoming press conference**]:

1. PARKING AREAS

Following a modernisation and expansion phase, and the installation of free charging terminals for electric vehicles in 2018, the P2 parking area will soon be brought into operation in its new service configuration, and the P4 extension project will be completed in the spring.

2. HALL A

As a prelude to the construction of a new infrastructure project that will be launched this year, work on increasing the capacity of Hall A begins in January with the refurbishment of the inspection zones, for a faster and more comfortable experience.

3. THE BILLI TERMINAL

Work on modernising the check-in and baggage handling systems in the low-cost terminal will be carried out in the first half of 2019, before the launch of another new major project.

4. THE 45th PARALLEL

The groundwork will soon begin on the airport's future tertiary activity centre, with the start of excavations on the site.

5. INTERMODALITY

To pave the way for the future Bus and Tramway service, the development of access roads and concourses will begin in the second half of 2019.

6. JUNCTION OF HALLS A and B

The design phase for the project to connect Halls A and B, which is scheduled to round off the programme in 2023, will begin in 2019.

2018 HIGHLIGHTS

- ⇒ Airline **easyJet** bases **three aircraft** in Bordeaux
- ⇒ The Paris-Orly shuttle maintains **its 10 daily flights** in response to competition from the high-speed train line
- ⇒ **SWISS** starts operating a route to Zurich
- ⇒ Nouvelle-Aquitaine residents benefit from **direct long-haul flights to Martinique** with XL Airways
- ⇒ Adoption of a **€140 million investment plan** to improve the airport's infrastructure and service quality by 2023.



2019, AN EVENTFUL YEAR

24 NEW ROUTES ALREADY PLANNED FOR 2019

Bordeaux's network of destinations is constantly expanding. To date, **151 regular routes**, including **24 new services for 13 new destinations**, will be offered for the 2019 summer season. This brings the total to **109 destinations** served directly by **33 regular airlines**.

Destination	Airline	Number of flights	Launch
Djerba	Tunisair	1	31-March-19
Lisbon	Ryanair	5	1-Apr-19
Copenhagen	Ryanair	3	2-Apr-19
Krakow	Ryanair	2	2-Apr-19
Marseille	Ryanair	7	2-Apr-19
Ouarzazate	Ryanair	2	2-Apr-19
Cologne	Ryanair	3	3-Apr-19
Manchester	Ryanair	2	3-Apr-19
Nantes	Ryanair	4	3-Apr-19
Tangiers	Ryanair	2	3-Apr-19
Treviso	Ryanair	3	3-Apr-19
Dublin	Ryanair	2	4-Apr-19
Bari	Ryanair	2	5-Apr-19
Naples	Ryanair	2	5-Apr-19
Mykonos	Ryanair	1	7-Apr-19
Vienna	Volotea	2	12-Apr-19
Helsinki	Finnair	2	11-May-19
Pula	Volotea	1	5-June-19
Djerba	Nouvelair	1	11-June-19
Montreal	Air Canada	4	15-June-19
Granada	easyJet	3	15-June-19
Porto	easyJet	2	16-June-19
Arrecife	easyJet	2	17-June-19
Mahon	easyJet	2	18-June-19

THREE NEW AIRLINES LAND IN 2019

Air Canada will launch four weekly flights between Bordeaux and Montreal this summer. Through this new airline, in addition to the Air Transat programme, Nouvelle-Aquitaine residents will benefit from daily flights to Canada during the summer season. Canada's national airline stands



out for its high level of service and immense network. It will, of course, offer multiple connections to the entire American continent. The Bordeaux route will be operated by a Boeing 737 MAX 8 and will offer two service categories.

Finnair arrives in Bordeaux, operating two weekly flights to Helsinki from May 11 to September 14. This airline is a trailblazer in the field of sustainable development, provides impeccable service and is a member of the One World alliance. It will be offering attractive connections, particularly to Lapland, China, Russia, Japan and Scandinavia.

NouvelAir is a Tunisian airline which will be offering one weekly flight (on Tuesdays) to beautiful Djerba, for holidays in the sun between 11 June and 24 September.

CONTINUED ESTABLISHMENT OF AIR BASES

In five years, three airlines have developed air bases in Bordeaux, making a powerful economic impact on employment and the destination network.

Volotea / Bordeaux-based since 2012, the Spanish low-cost airline now has three Bordeaux-based aircraft. With a fourth Airbus A319 delivered in 2019, Volotea will operate 30 destinations next season, including 19 exclusive destinations and three new routes to Vienna, Pula (Croatia) and Lanzarote (Canary Islands). 120 local jobs have been created by the company in six years and 30 more with the arrival of the new aircraft. Volotea will offer 800,000 seats in 2019, 70,000 more than in 2018.

EasyJet / The establishment of its base last March led to the opening of nine new destinations from Bordeaux in 2018 and the addition of many new flights. An additional aircraft will be added in 2019 to the three Bordeaux-based A320s, creating 36 new direct jobs. To improve the passenger experience, a new easyJet no-queue system has been set up in the Billi Terminal for Flexi ticket or easyJet Plus subscription card holders. The orange-liveried low-cost airline is aiming for a 22% capacity increase by 2019, corresponding to nearly 3 million available seats. With 37 direct routes – 16 of these exclusive – it ranks as the leading airline in terms of the number of destinations offered.

Ryanair / At the end of the year, the Irish airline announced the opening of its base and 16 new destinations from April 2019. With two Bordeaux-based aircraft, Ryanair will offer 26 routes and 70 weekly flights. A major investment that will more than double the number of flights and seats offered. Ryanair, currently recruiting around 60 pilots and cabin crews, is giving a strong economic boost to the platform.



APPENDICES

1- 2018 PASSENGER TRAFFIC

		Dec-18	2017/2018 %	2018 TOTAL	2017/2018 %
TOTAL PASSENGERS	excluding transit and non-commercial flights	475,158	10.1%	6,779,884	9.3%
NATIONAL		236,568	1.5%	2,955,556	-2.2%
	PARIS	100,156	-8.3%	1,255,465	-17.3%
	LYON	46,541	3.6%	560,531	5.8%
	MARSEILLE	28,776	26.0%	327,181	10.8%
	NICE	21,240	19.0%	257,287	28.7%
	STRASBOURG	18,719	-5.3%	119,423	-7.1%
	LILLE	14,421	25.1%	180,562	20.6%
	AJACCIO	1,566	-18.9%	89,732	18.4%
INTERNATIONAL		236,151	20.2%	3,824,328	21.2%
British	LONDON LGW	18,846	-5.5%	307,864	5.7%
Isles	LONDON LUTON	8,571	13.1%	87,958	5.3%
	LONDON STANSTED	6,791	8.1%	93,128	11.3%
	DUBLIN	5,214	15.7%	89,330	32.8%
	BRISTOL	3,087	34.0%	57,716	18.5%
	LIVERPOOL	-	-	22,133	21.3%
Northern and Central Europe	AMSTERDAM	17,865	-5.3%	308,938	1.0%
	GENEVA	16,379	9.9%	207,641	0.9%
	BASEL MULHOUSE	12,432	64.0%	121,174	4.5%
	ZURICH	6,535	NS	64,933	NS
	BERLIN	5,430	26.5%	63,461	13.5%
	LUXEMBOURG	5,297	NS	43,087	NS
	FRANKFURT	3,622	NS	49,721	NS
	PRAGUE	3,055	4.5%	27,196	37.4%
	BRUSSELS	2,691	-53.7%	93,799	11.5%
	BUCHAREST	2,034	-4.5%	31,966	NS
	MUNICH	2,029	5.3%	19,633	35.5%
	DUSSELDORF	1,037	-23.9%	16,888	NS
	HAMBURG	-	-	26,034	55.7%
	BUDAPEST	-	-	25,372	218%
	WARSAW	-	-	17,780	-
Southern Europe	BARCELONA	13,173	19.5%	198,842	23.3%
	LISBON	12,792	-2.8%	178,512	5.9%



	MADRID	10,281	11.2%	128,656	25.1%
	MILAN	4,743	-14.6%	78,635	9.9%
	VENICE	4,697	24.3%	74,762	10.4%
	BERGAMO	3,707	-7.9%	56,013	47.4%
	ROME CIAMPINO	3,084	-1.5%	56,331	-1.1%
	MALAGA	2,461	97.5%	48,537	41.6%
	FARO	1,960	NS	39,703	NS
	ATHENS	908	NS	26,098	17.8%
	PALMA	665	NS	85,160	36.7%
	CATANIA	-	-	24,493	-
	ALICANTE	-	-	16,037	72.1%
	PALERMO	-	-	15,750	23.7%
	PISA	-	-	14,692	8.4%
	NAPLES	-	-	13,881	13.4%
North Africa	MARRAKESH	8,206	49.9%	85,420	15.4%
	CASABLANCA	7,032	-4.5%	92,004	-2.2%
	FEZ	4,752	122.5%	31,571	29.1%
	ALGIERS	2,688	-8.5%	34,925	-8.4%
	TUNIS	1,899	12.2%	27,816	15.8%
	ORAN	931	4.5%	16,425	24.1%
	ISTANBUL	-	-	37,529	14.4%
Canada	MONTREAL	-	-	34,357	44.3%
LOW-COST ONLY		264,603	25.0%	3,751,042	22.1%



2- 2019 NETWORK MAP



2018-2019 Programme – Edison December 2018

MAP KEY

Athènes	Athens	Copenhague	Copenhagen	Lisbonne	Lisbon	Santorin	Santorini
Alger	Algiers	Corfou	Corfu	Londres Gatwick	London Gatwick	Séville	Seville
Bâle	Basel	Cracovie	Krakow	Londres Luton	London Luton	Tanger	Tangiers
Barcelone	Barcelona	Edimbourg	Edinburgh	Londres Stansted	London Stansted	Trévise	Treviso
Bergame	Bergamo	Fès	Fez	Malte	Malta	Valence	Valencia
Bologne	Bologna	Francfort	Frankfurt	Marrakech	Marrakesh	Varsovie	Warsaw
Bruxelles	Brussels	Genève	Geneva	Minorque	Minorca	Venise	Venice
Bucarest	Bucharest	Grenade	Granada	Palerme	Palermo	Vienne	Vienna
Catane	Catania	Hambourg	Hamburg	Pise	Pisa		

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