



EASA Business Jets workshop

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BUSINESS AVIATION VS. AIRLINES (EUROPE)

MONTHLY CONNECTIVITY COMPARISON – YTD 2024



Airports connected



1.028

Airports connected
(572 in Europe)



2.606

Airports connected
(1.483 in Europe)

among which
62%

**EXCLUSIVE TO
BUSINESS AVIATION**

1.612

airports were exclusively used by Business aviation



Unique routes served

10.102

unique routes
(airport pairs) served

83.609

unique routes
(airport pairs) served

among which
91%

76.406

routes with no airlines alternatives

73% of Business aviation flights happened on those routes

- Airlines categories are defined by EUROCONTROL as : « mainline, low cost airlines and regional airlines)
- For airlines, routes below at least 1 connection a week are excluded from the analysis (*it is assumed that below at least 1 weekly connection, a route cannot be considered as a part of the scheduled air transport offer).*

DEPARTURES, ARRIVALS, INTERNALS AND OVERFLIGHTS (DAIO) REPORT

TOTAL BUSINESS AVIATION FLIGHTS

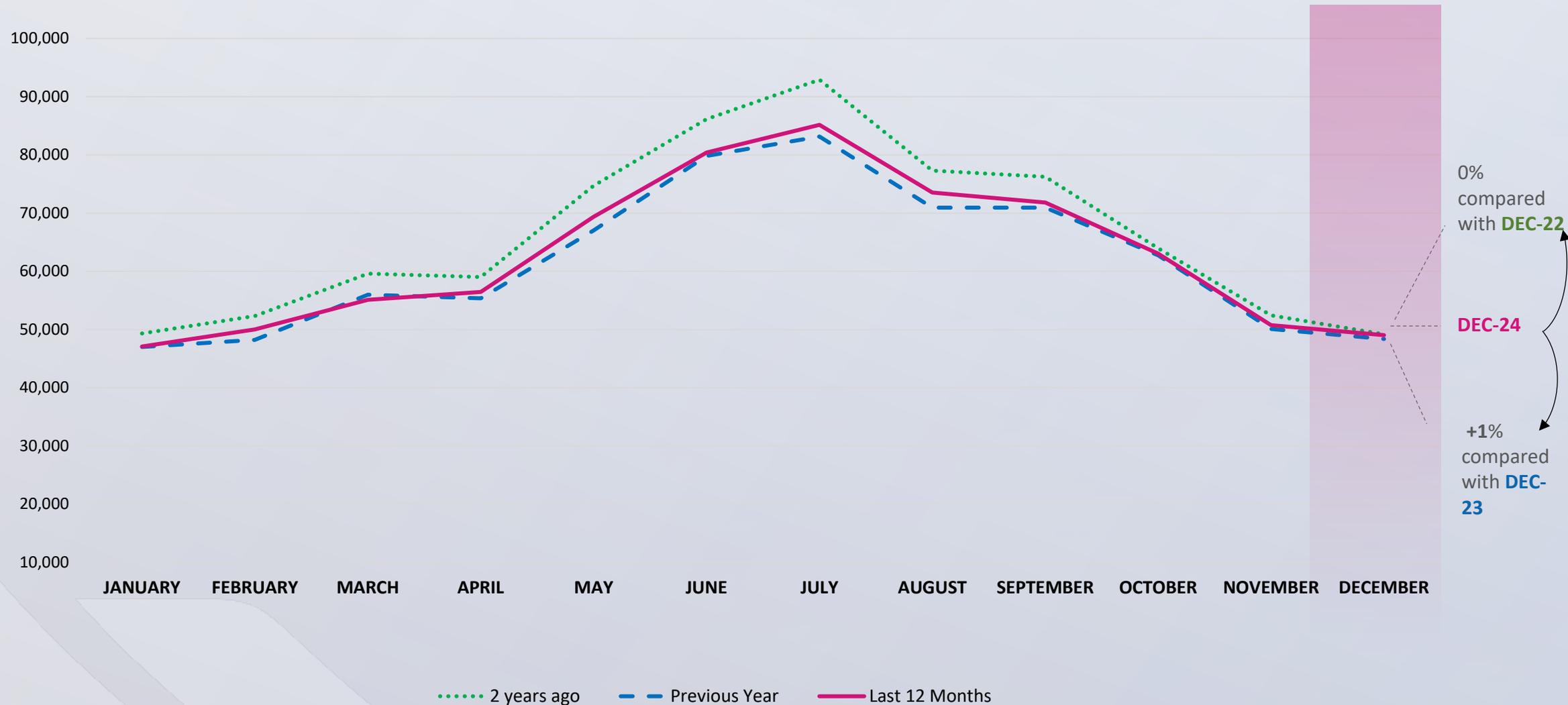


Business Aviation (ECAC Area)

	ARRIVAL			DEPARTURE			INTERNAL			OVERFLIGHT			PREVIOUS YEAR	CURRENT YEAR	GROWTH
	Previous Year	Current Year	Growth	Previous Year	Current Year	Growth	Previous Year	Current Year	Growth	Previous Year	Current Year	Growth			
Jan 2024	3.036	3.250	7,0%	2.825	3.041	7,6%	40.633	40.239	-1,0%	462	556	20,3%	46.956	47.086	0,3%
Feb 2024	2.642	3.025	14,5%	2.578	3.006	16,6%	42.543	43.497	2,2%	379	482	27,2%	48.142	50.010	3,9%
Mar 2024	3.315	3.267	-1,4%	3.220	3.170	0,4%	48.909	48.026	-1,8%	469	541	15,4%	55.950	55.104	-1,5%
Apr 2024	3.232	3.474	7,5%	3.069	3.156	9,4%	48.589	49.083	1,0%	422	553	31,0%	55.312	56.466	2,1%
May 2024	3.610	3.989	10,5%	3.374	3.642	7,9%	59.114	61.167	2,6%	422	581	37,7%	67.020	69.379	3,5%
Jun 2024	4.269	4.407	3,2%	3.922	4.206	7,2%	71.114	71.772	0,2%	333	498	49,5%	79.653	80.403	0,9%
Jul 2024	3.765	4.147	10,1%	3.889	4.112	6,5%	75.177	76.393	1,6%	324	478	47,5%	83.155	85.160	2,4%
Aug 2024	3.486	3.869	11,0%	3.510	4.034	14,9%	63.694	65.185	2,3%	273	409	71,1%	70.943	73.521	3,6%
Sep 2024	3.468	4.026	16,1%	3.416	4.012	17,4%	63.684	63.356	-0,5%	369	455	15,2%	70.937	71.819	1,2%
Oct 2024	3.629	3.776	4,1%	3.744	4.077	8,9%	55.751	54.671	-1,9%	429	526	22,6%	63.553	63.050	-0,8%
Nov 2024	3.072	3.302	7,5%	3.020	3.282	8,7%	43.512	43.605	0,2%	392	547	13,5%	50.086	50.736	1,3%
Dec 2024	2.875	3.202	11,4%	3.023	3.334	10,3%	41.932	41.889	-0,1%	560	611	9,6%	48.390	49.039	1,3%
Grand Total	40.399	43.734	8,3%	39.627	43.402	9,5%	655.167	658.403	0,5%	4.904	6.234	27,1%	740.097	751.773	1,6%

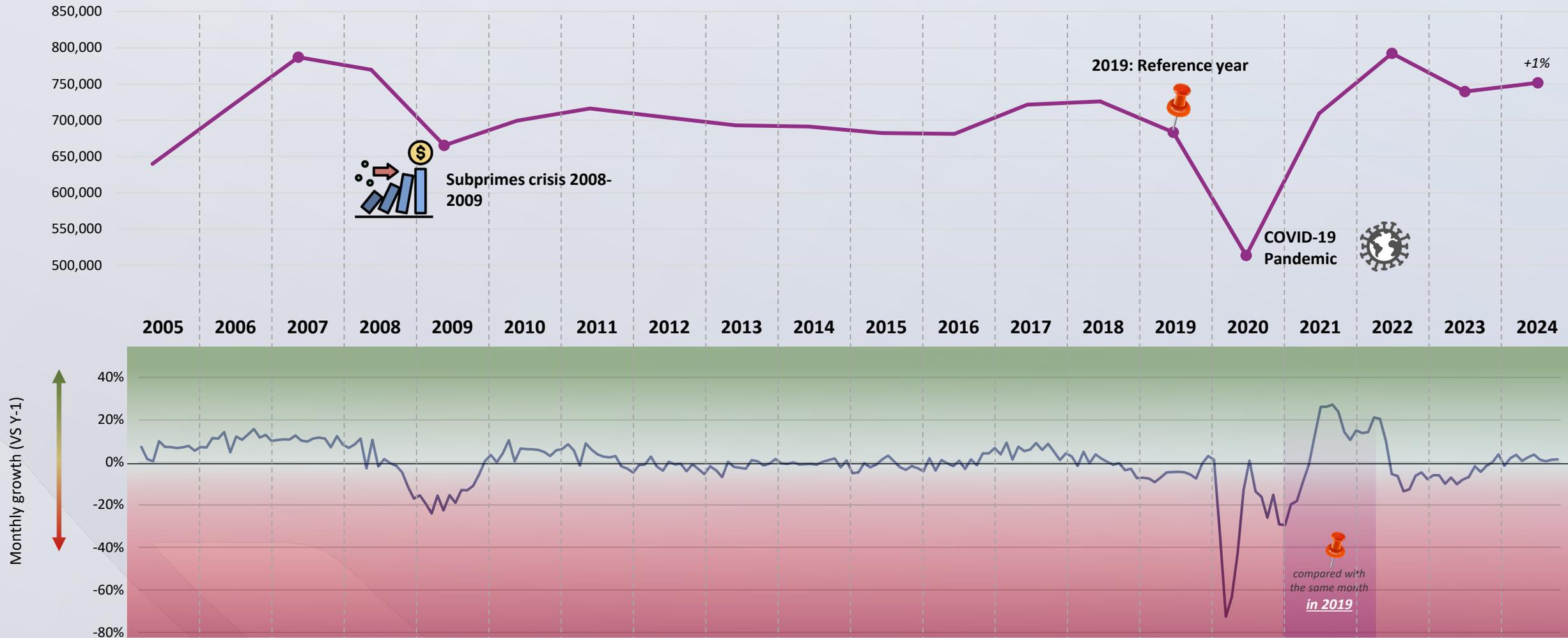
DEPARTURES, ARRIVALS, INTERNALS AND OVERFLIGHTS (DAIO) REPORT

TOTAL BUSINESS AVIATION FLIGHTS



BUSINESS AVIATION IN EUROPE : 2005 – NOW

MONTHLY ACTIVITY AND GROWTH



EUROPEAN STATES – STATE OF PLAY

« YEAR-TO-DATE » details in Europe (flights from january onwards)



STATE OF PLAY - YTD (from january onwards)

	MONTH CURRENT YEAR	MONTH GROWTH	YTD CURRENT YEAR	YTD GROWTH
FRANCE	15.340	0%	243.461	-3%
UNITED KINGDOM	14.762	1%	208.895	0%
GERMANY	11.521	-2%	173.504	-2%
ITALY	7.829	6%	152.339	1%
SPAIN	6.758	4%	118.928	3%
SWITZERLAND	7.778	0%	98.559	-1%
TURKEY	3.393	6%	56.467	0%
GREECE	1.356	-6%	42.777	6%
NORWAY	2.901	-3%	40.671	2%
AUSTRIA	3.028	-4%	40.572	-1%
SWEDEN	2.773	-13%	39.041	-7%
BELGIUM	1.984	1%	27.351	-2%
NETHERLANDS	1.848	-1%	26.963	-6%
POLAND	1.567	-8%	22.910	0%
CZECH REPUBLIC	1.518	6%	21.710	4%
PORTUGAL	1.190	2%	20.180	-2%
IRELAND	1.105	5%	16.379	-3%
CROATIA	516	17%	15.007	-1%
DENMARK	957	-4%	14.764	1%
ICELAND	1.049	0%	13.557	0%
ROMANIA	1.030	11%	13.449	9%
FINLAND	1.242	2%	12.386	-11%
HUNGARY	710	18%	10.809	4%
CYPRUS	560	-18%	8.322	2%
SLOVAKIA	587	25%	7.773	-4%
SERBIA	534	-21%	7.447	-13%
LUXEMBOURG	519	-3%	6.902	-5%
BULGARIA	430	19%	6.107	1%
MALTA	389	39%	5.325	4%
SLOVENIA	273	19%	3.927	8%
MONTENEGRO	131	-4%	3.834	3%
LITHUANIA	166	-9%	2.528	-12%
LATVIA	160	-4%	2.245	-5%
ESTONIA	144	-18%	2.223	-8%
BOSNIA AND HERZEGOVINA	113	-12%	1.755	15%
ALBANIA	124	27%	1.542	6%
MOLDOVA	117	30%	1.396	16%
MACEDONIA	67	24%	838	-10%
UKRAINE				

ReFuelEU Regulation mandates that *“the yearly quantity of aviation fuel uplifted by an aircraft operator at a given Union airport shall be at least 90 % of the yearly aviation fuel required”* and includes reporting requirements for the fuel uplifted.

This rule will limit operators flexibility to refuel at cheaper or more convenient locations outside the EU.

The antitankering rule could lead to several issues for Bizav operators:

- Considerable administrative burden
- Increased refuelling times and operational delays
- Potential fines
- Additional safety risks





ReFuelEU Aviation mandates fuel suppliers at Union airports to gradually increase the share of SAF blended with conventional aviation fuel **from 2% in 2024, to 70% in 2050.**

With current SAF limited availability, EBAA is advocating for including a **book-and-claim system** within the scope of ReFuelEU to allow business aviation operators to contribute to SAF uptake in the EU when it is not available on-site.



EU Commission has been sceptical about book-and-claim, citing accounting complications and Member States resistance.



REVISION OF SLOTS REGULATION (2025)

ISSUE

The current slot regulation does not sufficiently meet the unique slot allocation needs of business aviation, particularly given its non-scheduled, flexible nature.

EBAA POSITION

EBAA calls for an equitable solution, recognising flexibility in the system by allowing late arrivals and equitable access to airports for business aviation operators.



NON CO2 EMISSIONS: ADDITION TO EU ETS

The Commission established a monitoring system (MRV) for aircraft operators to monitor non-CO2 emissions, to be operational from 1 January 2025, with the possibility to add non-CO2 emissions to ETS scope in 2027.

EBAA calls for excluding business aviation from the scope of non-CO2 emissions inclusion within ETS.



REVISION AIR SERVICES REGULATION

ISSUE

In 2025, the Commission intends to revamp a previous proposal to revise standards to grant operating licences and regulate the distribution of air traffic.

EBAA POSITION

EBAA calls for ensuring that any future revision of the regulation creates a harmonised legal framework to safeguard consistency across the EU and avoid the ban on short-haul flights in certain Member States.



REVISION REFUEL

The regulation's 2026 review clause opens up possibilities to amend the antitankering mandate and include a book-and-claim system.

EBAA calls for a tankering rule that reflects business aviation realities and a reliable book-and-claim system that includes non-Union airports in the scope.



Thank you!

