/Annual Traffic Report 2023

Air Traffic Statistics

Living ideas - Connecting lives

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/Traffic results 2023 at a glance

Total aircraft movements
302,150
+6.0 %

Commercial traffic
294,342
+6.3 %

Scheduled / charter traffic
283,515
+7.5 %

Non-commercial traffic
7,808
-4.9 %

Total passengers
37.05 m
+17.0 %

Commercial traffic
37.04 m
+17.0 %

Scheduled / charter traffic
37.02 m
+17.1 %

Non-commercial traffic
10,675
-1.5 %

Air freight turnover
277,199 t
+7.1 %

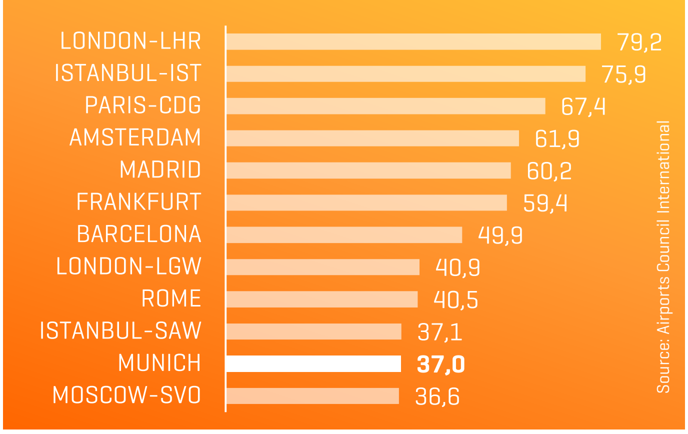
/Traffic development 2023

Global air traffic is recovering, but Germany is lagging behind

Long-haul traffic is the main pillar of recovery

Long-haul traffic is the main pillar of recovery
Demand for air travel remains strong: 2023 is marked – in particular – by the return of international passengers. This segment made up 51 %, which is identical to the corresponding pre-crisis level. In total, the number of international passengers stood -23 % below 2019.

Traffic to North America – the main driver of the long-haul recovery – already exceeded its pre-crisis levels. The important Asian markets also recovered quickly: Destinations such as India or Thailand also managed to grow beyond 2019 levels. China, however, is still lagging behind due to its late reopening date, but still managed to grow substantially over the course of the year.



Top 12 Airports in Europe 2023 – Passengers (in m):

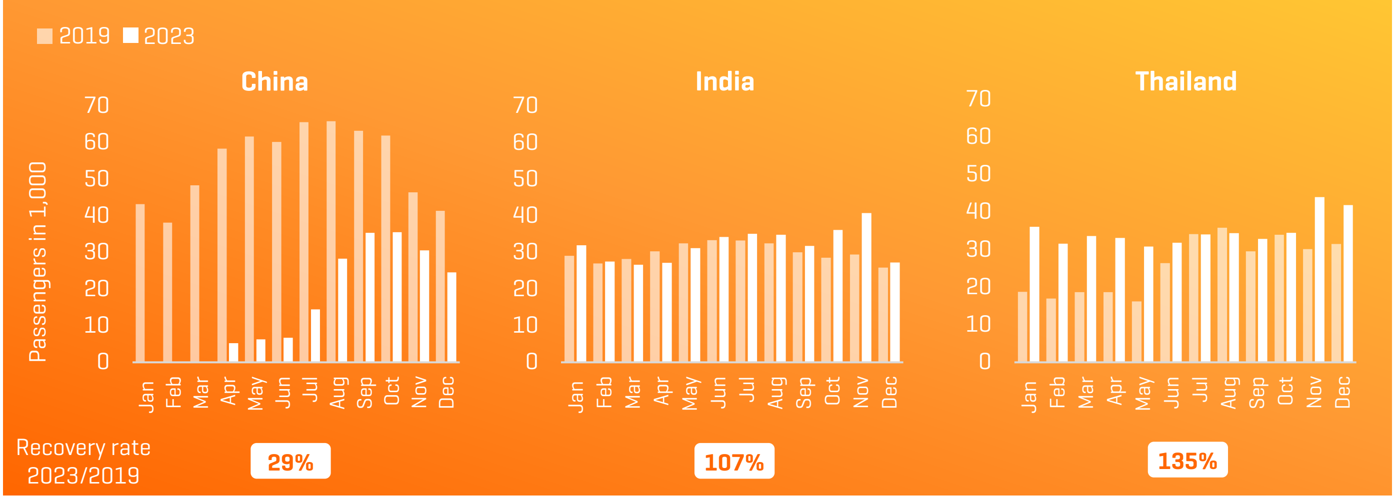
The development in Germany remains sluggish

In total, Munich Airport handled 77 % of its pre-crisis traffic during the past year. Similar values are reported by the ADV, the council of German Airports. Hence, Germany remains markedly behind the recovery rates achieved in Europe as well as globally, as these markets achieved – according to ACI Europa and IATA, respectively – around 95 % of pre-crisis levels.
The high level of location costs in Germany – especially local taxes – are hamstringing growth. Decentralized domestic German traffic in particular is still in the doldrums. Domestic traffic is also showing the lowest recovery rates at the big hubs, coupled with high ticket prices and reduced services.

Additionally, geopolitical crises as well as the issues surrounding the provision and staffing of aircraft inhibited the development. In Munich, the result was further worsened by the extraordinarily strong winter weather in early December.

Seat load factors rise to record levels

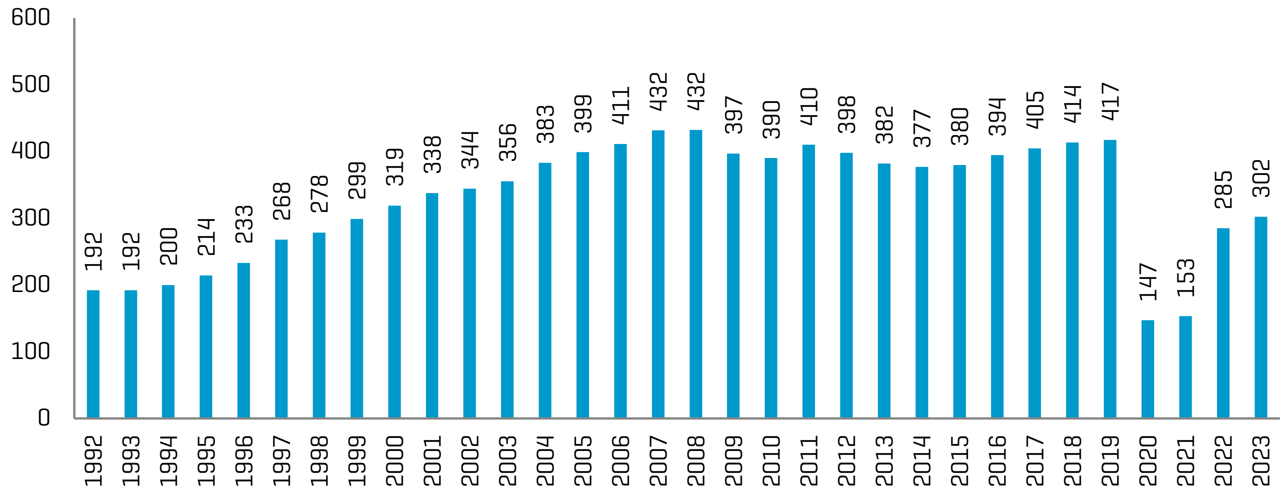
The available flights had an average seat load factor of 81 % – a new record that highlights clearly that the sluggish recovery in spite of high ticket prices is not caused by a lack of demand. A special survey by the F.U.R. provides further evidence for the population's unbroken desire to travel by plane.



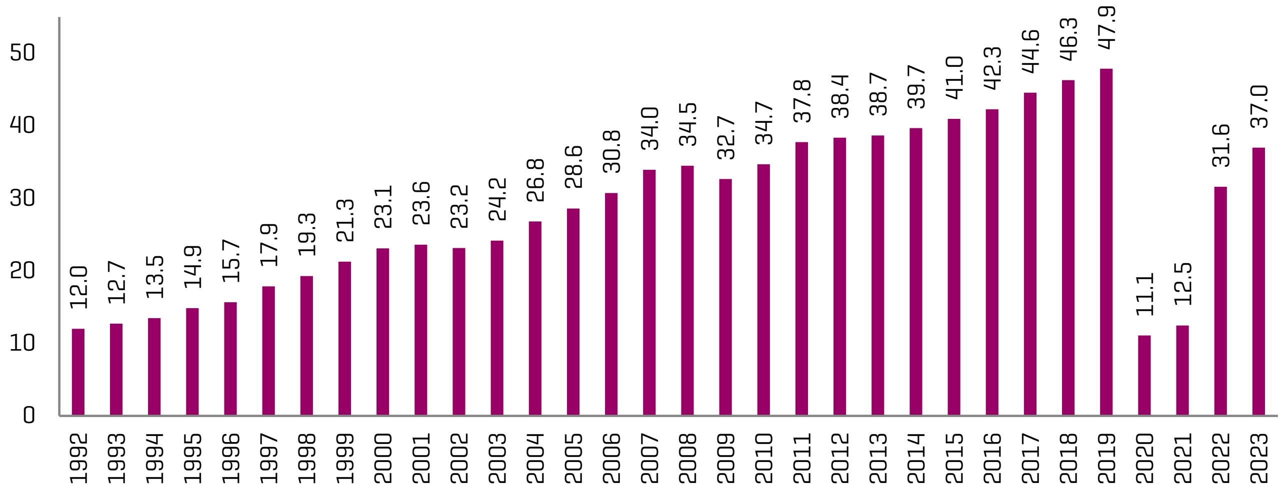
Monthly passengers to/from Asia 2023 (compared to 2019)

Development of air traffic at Munich Airport 1992-2023

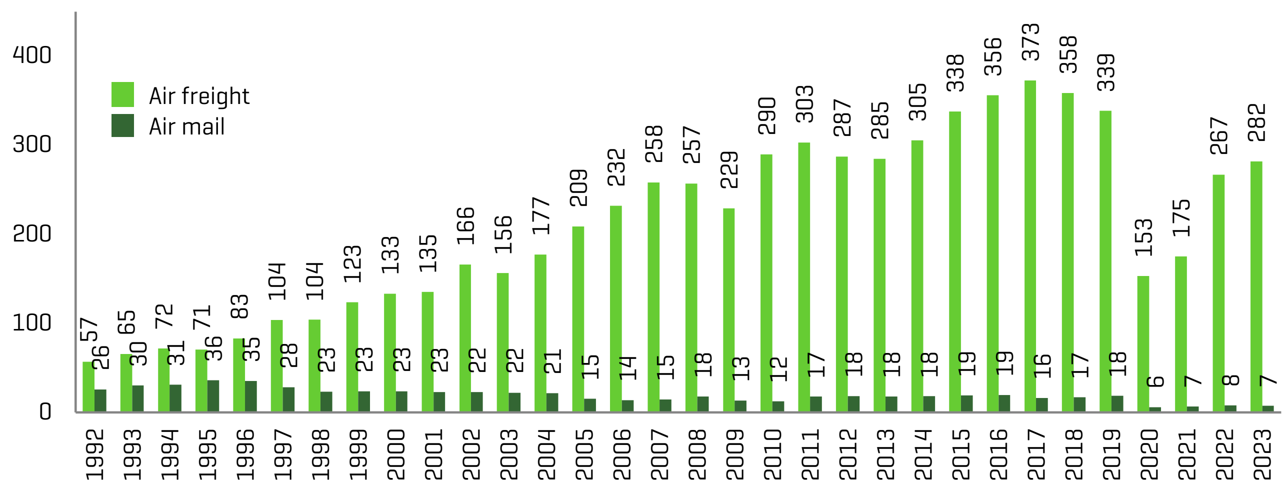
Aircraft movements – total traffic (in 1,000)



Passengers – commercial traffic (in millions)



Air freight and air mail incl. transit (in 1,000 tons)



/ Aircraft movements 2023

7 Movements – development 2023
8 Aircraft movements 2023 at German airports

/Aircraft movements 2023

Growth in flights is driven by strong demand for air travel

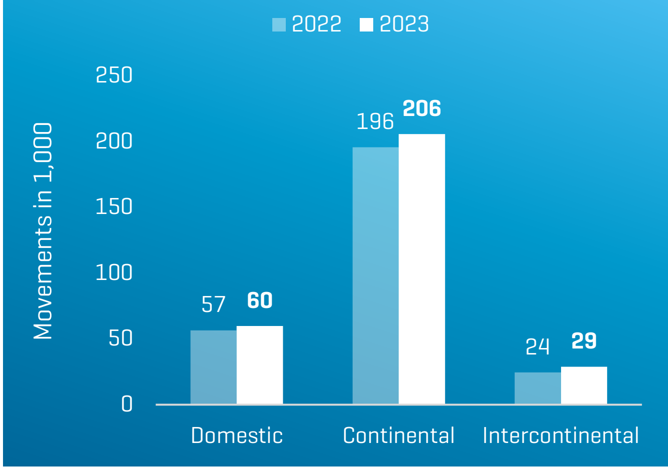
302.150 aircraft movements – growth of +6 %
The main driver of the positive development were the regular passenger flights, which grew disproportionately by +7.7 %. At the same time, pure freighter flights decreased by -7.1 % and non-commercial flights by -4.1 %. The commercial part of General Aviation even shrunk by -16.8 %.

Munich ranks 11th in Europe
Amongst the busiest airports in Europe, Munich Airport managed to claim the 11th rank. Owed to the geopolitical distortions caused by the Russian attack on Ukraine, this comparison is, however, tainted by several exceptional effects.

Hub traffic remains the driver of recovery
Long-haul flights – which are directly tied to the airports' hub functions – grew the fastest, reaching a total of 28,813 commercial aircraft movements (+17.7 %). Continental traffic – which, to a large share, works as a feed to the hub – could grow substantially, too, and reached a total of 205.735 movements (+5.1 %). While domestic traffic finally gained some traction particularly towards the end of the year and recorded a growth of +5.6 % (59,794 movements), its recovery remains behind the other traffic segments.

Since the COVID pandemic, domestic traffic is dominated by a monopoly, subsequentially leading to a reduced offer with inflated prices. Since local costs remain high, no alternative provider for price sensitive point-to-point traffic has entered the market to date.

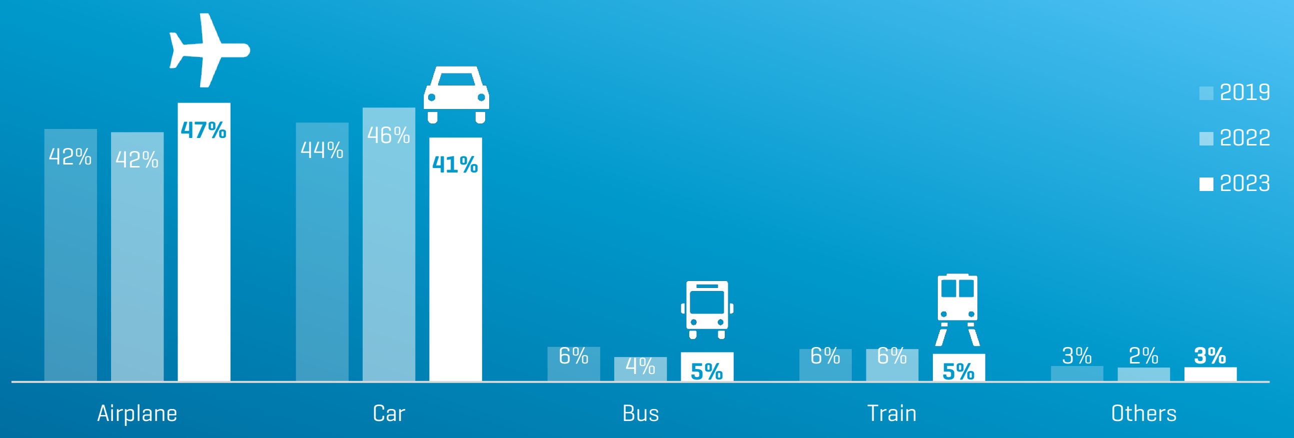
Number of movements per region in 2023 (compared to 2022)



Munich and London-Heathrow are Europe's only A380 hubs
The high demand in Munich allowed Lufthansa – in defiance of earlier plans – to reintroduce regular services with Airbus A380 aircraft. So far, the flights have proven highly successful, leading to an expected total of six A380 that will be based in Munich during summer 2024.

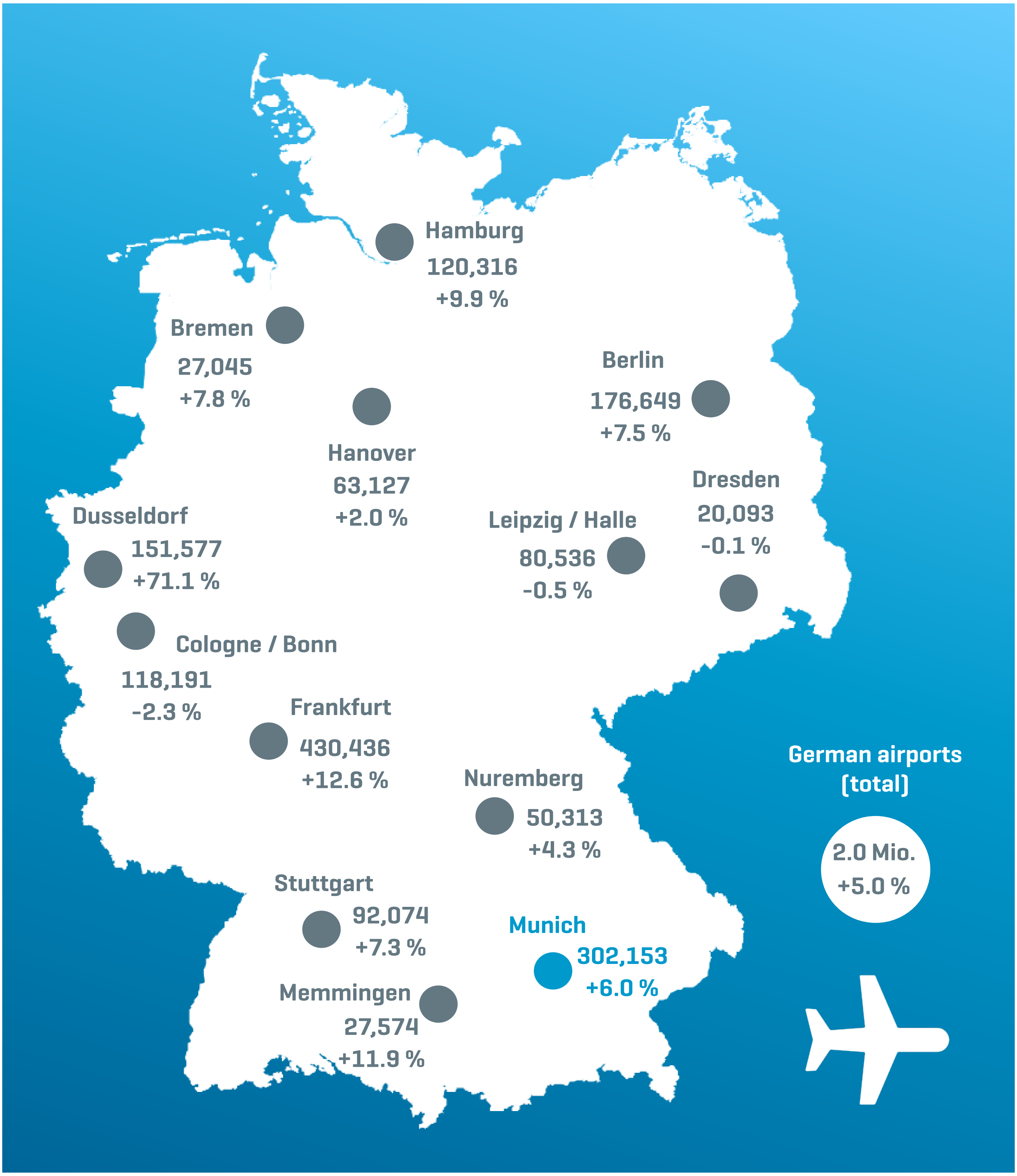
Not a hint of „flight shame"
The F.U.R. survey shows that the airplane is now the preferred mode of travel for German vacationers.

Airplane - preferred mode of travel for German vacationers
Means of transport for holiday trips 2023 (compared to 2022 and 2019)



Source: F.U.R. survey

Aircraft movements 2023 at major German airports



/Passengers 2023

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12 Passengers 2023 at German airports

/Passenger development 2023

Backed by double-digit growth rates, the recovery of passenger traffic is gaining pace

Growth of 5.4 m passengers

With a total of 37.0 m passengers, Munich Airport again noted strong growth. Private travelers (+18 %) as well as business travelers (+15 %) traveled more; however, since the number of private travelers grew disproportionately, the share of business traffic softened to 27 %. Particularly pleasing is the high share of business travelers amongst inbound travelers to Munich – highlighting the ongoing importance of the city as a center of commerce and industry.

The share of transferring passengers remained high at 41 % but shrank by 1 PP. because of the strong recovery of O&D traffic.

Frequent female flyers

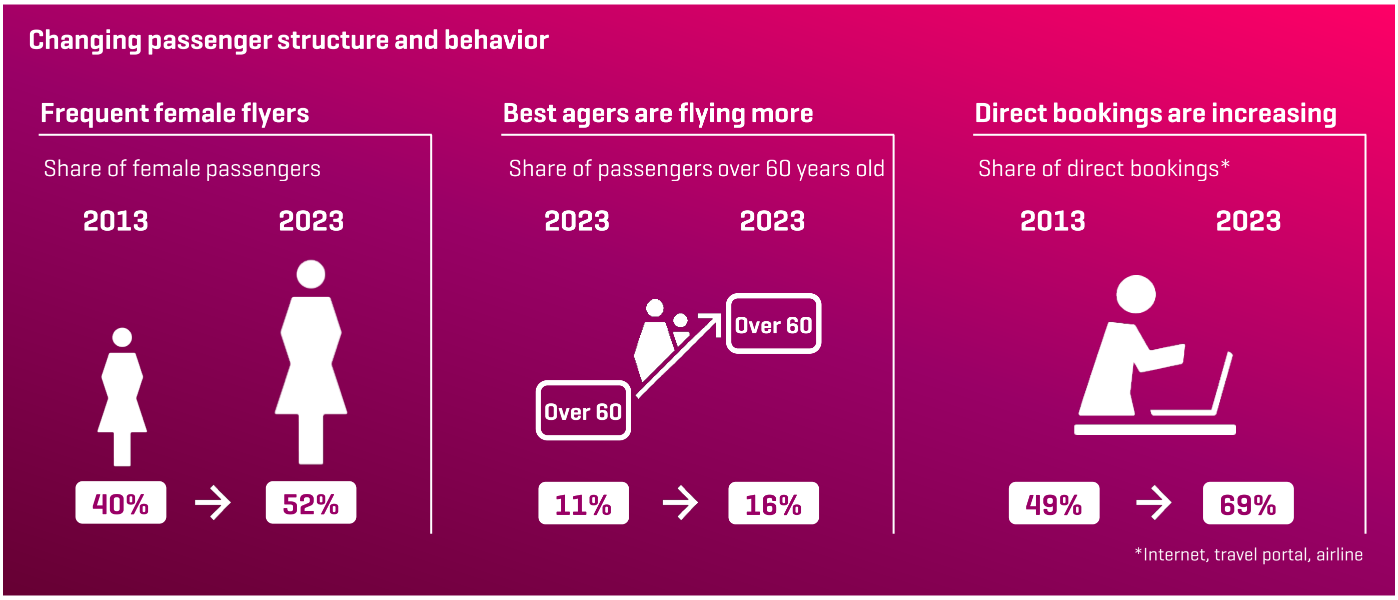
The majority of passengers in 2023 were female (52 %). Just ten years ago, their share stood at just 40 %. This development is mainly driven by an increasingly strong demand for private travel. However, the share of women traveling for business also increased substantially to 45 %.

Seat load factors reach record levels

Another year, another record: The average seat load factor of 81 % is proof of high demand meeting a limited offer.

All traffic segments are growing

The strongest development was recorded in the long-haul segment which grew to more than 7 m passengers (a plus of +31 % y.o.y.). Relatively, domestic traffic showed strong growth rates as well – climbing by +19 % to a total of 6 m passengers. However, its base was weaker, meaning the recovery of this segment is still lagging. The largest segment – continental traffic – noted a growth of +17 % to a total of 24 m commercial pax.



Structure of passenger traffic 2023

Passenger profile

Originating passengers **59 %**

Transfer passengers **41 %**

Modal split

Car	35 %
Rental cars & car sharing	6 %
Train	32 %
Bus, Transfer Services	16 %
Taxi	8 %
ÜFEX	1 %

Average duration of trip in days

	2019	2023
Private travel	16	18
Business travel	10	12

Permanent residence

Germany **49 %**

Other countries **51 %**

Reason for travel

Private **73 %**

Business **27 %**

Gender

Male **48 %**

Female **52 %**

Share of transfer passengers

2013 – 2023 (in %)

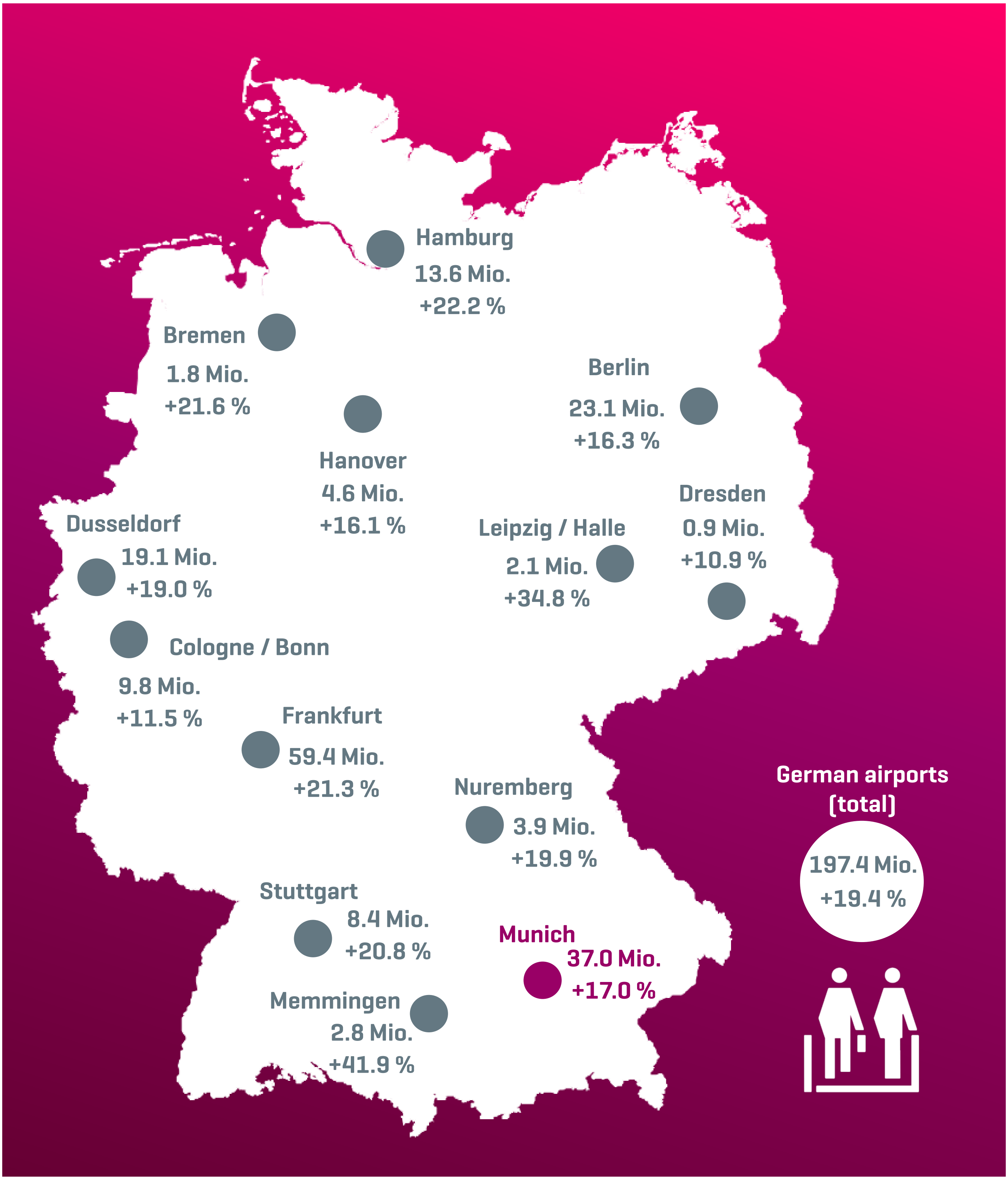
2013 → 2023

Age groups

Up to 29 years	23 %
30-39 years	24 %
40-49 years	20 %
50-59 years	18 %
60 years and older	16 %

Source: Munich Airport, Passenger survey

Passengers 2023 at major German airports



/Air freight and air mail 2023

14 Air freight and air mail – development 2023

15 Cargo 2023 at German airports

/Air freight and air mail 2023

In spite of a struggling economy, freight volumes grew in Munich

Ambivalent development

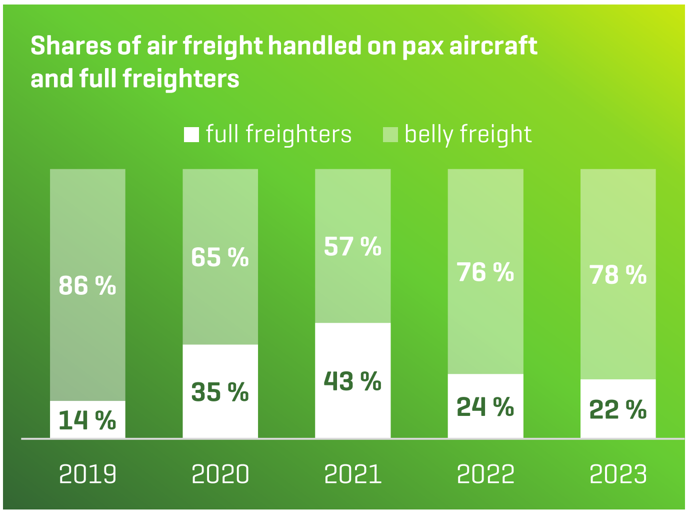
In total, the commercial freight turnover grew substantially by +7.1 % to a total of 277,199 tons. While this volume remains 16 % below pre-crisis levels, it is still a very encouraging development, particularly in light of the weakening German economy. The main driver of this development was the recovery of the belly freight, which is directly tied to the recovery of hub traffic with passenger flights. Belly freight noted a double-digit growth (+10.8 %) and reached 78.8 % of its pre-crisis volume. On the other hand, freight carried on pure freighters shrunk by -4.3 %, but remained 31.6 % above pre-crisis levels.

Air freight in Munich is growing – against the trend

Except for Munich Airport, none of the major air freight hubs noted a positive development. Munich is still benefiting from the extraordinary effect of recovering hub traffic, as most of the freight is carried in the belly of regular long-haul passenger flights. 2019, the last year before the pandemic, the share of belly freight stood at 86 %; in the past year, said share stood at 78 %, meaning the regular structure of freight handled at Munich Airport is slowly being reestablished.

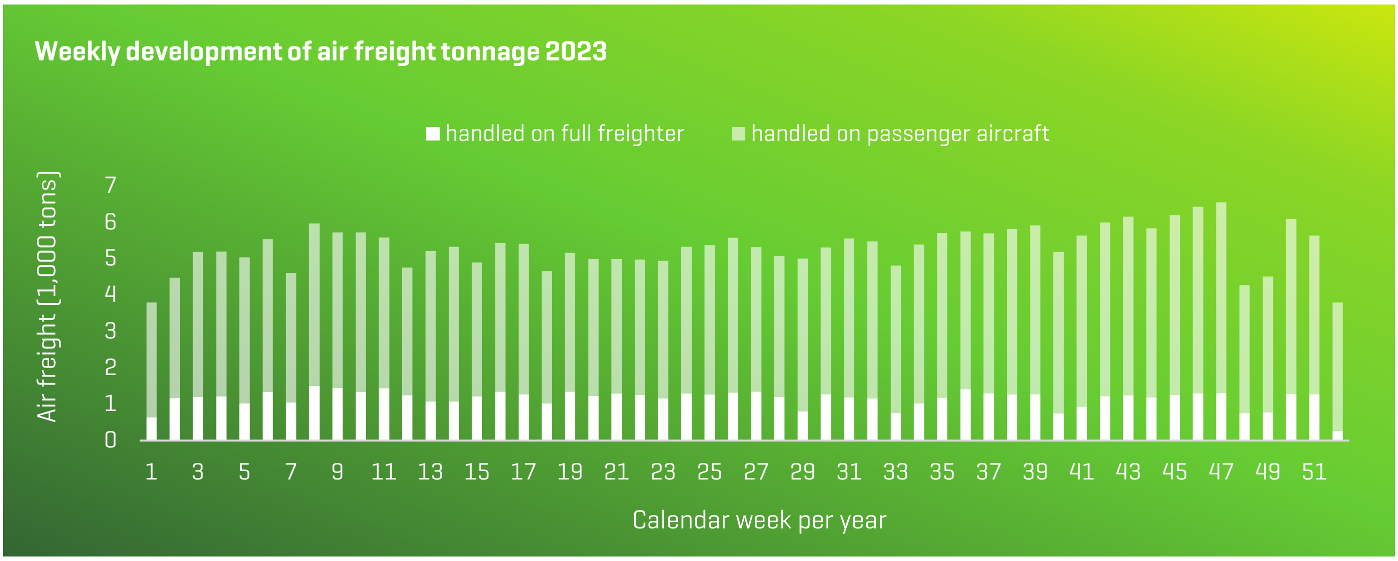
Air mail is shrinking

During the past year, a total of 7,147 tons of air mail were turned over. This corresponds to a growth of -9.8 % y.o.y. and a loss of -61.2 % against pre-crisis levels. Air mail is less susceptible to economic cycles, but more driven by strategic ambitions by the Deutsche Post (German Mail) and political decisions.

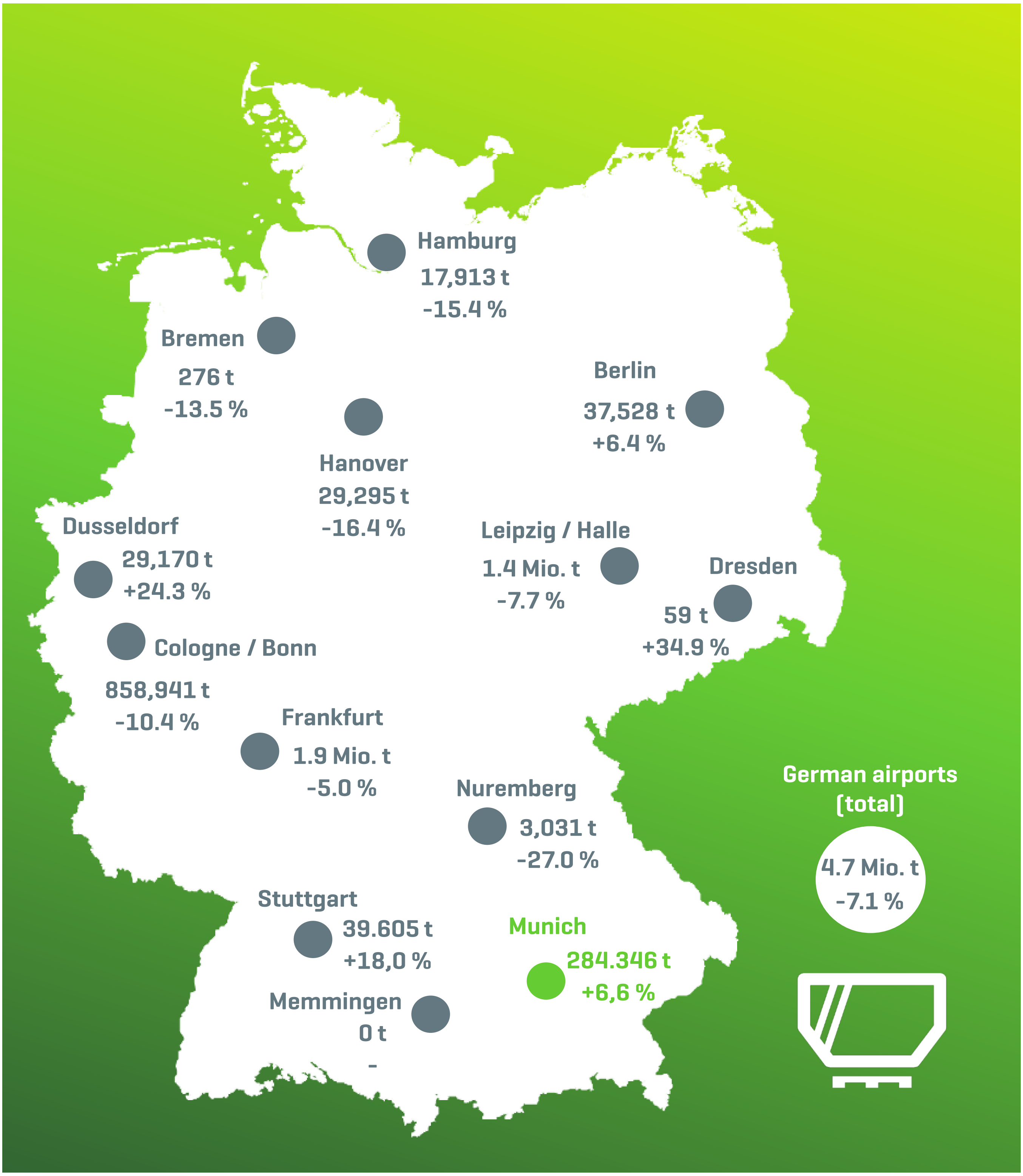


Cargo turnover is growing, too

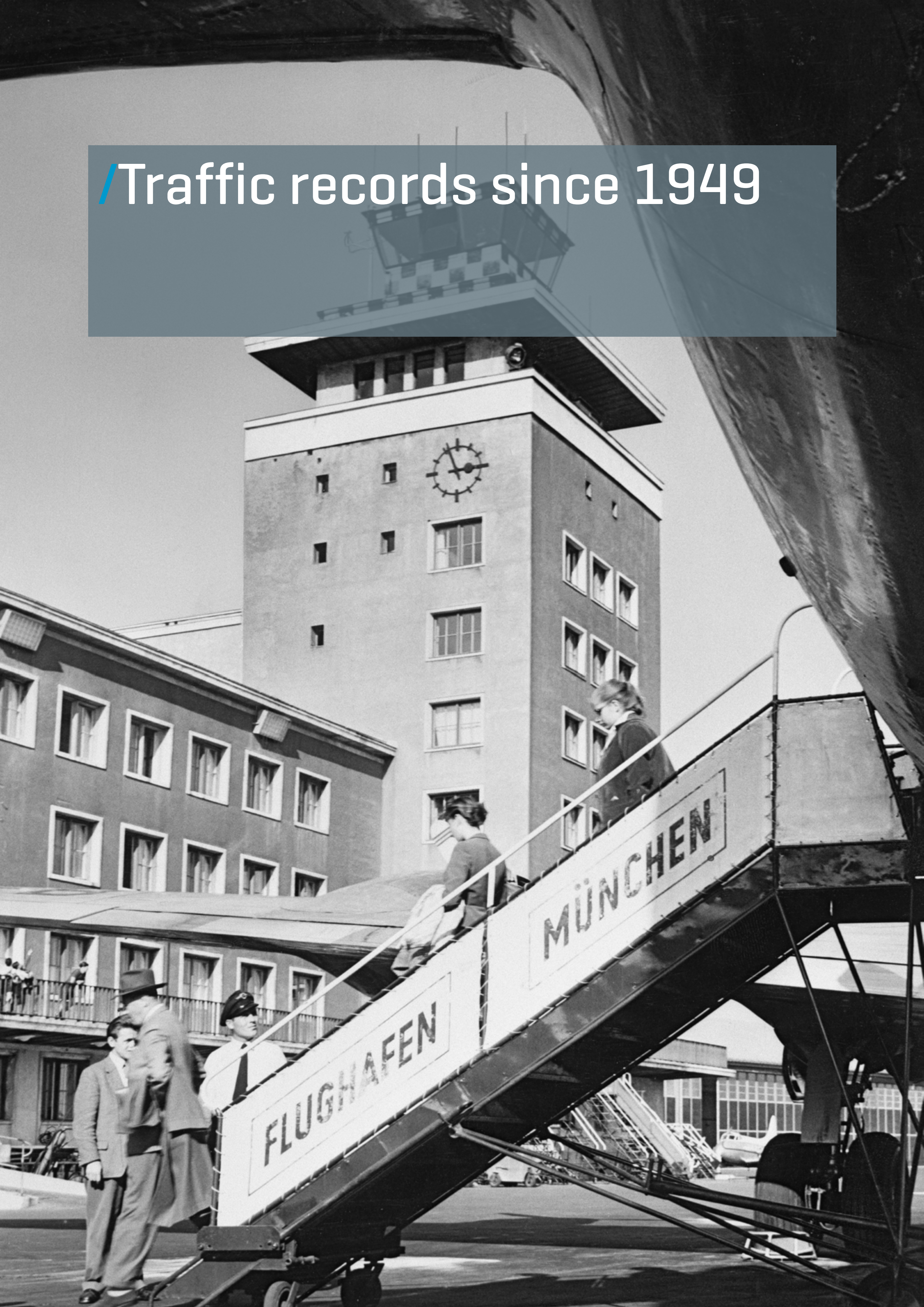
Summarily, the volume of cargo – comprising air mail and air freight turnover – has grown by +6.6 % to 284,346 tons. It remains just -18.8 % below 2019 levels.



Cargo 2023
at major German airports



/Traffic records since 1949



Traffic records since 1949

Year	Aircraft movements	Change	Commercial passengers	Change	Air freight (t)	Change	Air mail (t)	Change
1949	2,798		28,970		301		62	
1950	5,332	90.6 %	69,044	138.3 %	1,273	322.9 %	160	158.1 %
1951	8,262	55.0 %	114,574	65.9 %	2,697	111.9 %	395	146.9 %
1952	7,098	-14.1 %	114,578	0.0 %	1,761	-34.7 %	457	15.7 %
1953	9,392	32.3 %	140,280	22.4 %	1,834	4.1 %	347	-24.1 %
1954	13,630	45.1 %	171,207	22.0 %	2,302	25.5 %	520	49.9 %
1955	26,048	91.1 %	270,906	58.2 %	2,915	26.6 %	695	33.7 %
1956	46,052	76.8 %	349,571	29.0 %	3,605	23.7 %	755	8.6 %
1957	49,688	7.9 %	417,807	19.5 %	3,945	9.4 %	891	18.0 %
1958	46,328	-6.8 %	495,150	18.5 %	4,272	8.3 %	953	7.0 %
1959	46,658	0.7 %	586,921	18.5 %	5,288	23.8 %	1,175	23.3 %
1960	50,108	7.4 %	794,613	35.4 %	7,506	41.9 %	1,475	25.5 %
1961	44,826	-10.5 %	838,493	5.5 %	8,451	12.6 %	2,289	55.2 %
1962	47,206	5.3 %	1,006,056	20.0 %	10,140	20.0 %	3,734	63.1 %
1963	53,956	14.3 %	1,184,362	17.7 %	11,416	12.6 %	4,296	15.1 %
1964	56,070	3.9 %	1,318,935	11.4 %	12,827	12.4 %	4,886	13.7 %
1965	64,412	14.9 %	1,647,329	24.9 %	16,050	25.1 %	5,391	10.3 %
1966	73,836	14.6 %	1,852,641	12.5 %	18,446	14.9 %	6,155	14.2 %
1967	78,716	6.6 %	2,009,951	8.5 %	20,200	9.5 %	6,343	3.1 %
1968	80,576	2.4 %	2,277,588	13.3 %	26,901	33.2 %	6,809	7.3 %
1969	83,532	3.7 %	2,595,412	14.0 %	28,600	6.3 %	7,484	9.9 %
1970	102,907	23.2 %	3,550,929	36.8 %	31,943	11.7 %	8,696	16.2 %
1971	111,616	8.5 %	4,011,474	13.0 %	32,682	2.3 %	9,087	4.5 %
1972	113,174	1.4 %	4,467,464	11.4 %	36,638	12.1 %	10,612	16.8 %
1973	109,128	-3.6 %	4,247,764	-4.9 %	36,847	0.6 %	11,447	7.9 %
1974	113,788	4.3 %	4,332,887	2.0 %	37,883	2.8 %	11,002	-3.9 %
1975	116,668	2.5 %	4,543,138	4.9 %	34,664	-8.5 %	10,866	-1.2 %
1976	119,332	2.3 %	4,924,544	8.4 %	40,854	17.9 %	9,843	-9.4 %
1977	123,403	3.4 %	5,299,122	7.6 %	44,122	8.0 %	10,702	8.7 %
1978	130,172	5.5 %	5,624,780	6.1 %	47,856	8.5 %	7,859	-26.6 %
1979	138,859	6.7 %	6,084,917	8.2 %	39,118	-18.3 %	10,073	28.2 %
1980	142,032	2.3 %	6,057,997	-0.4 %	39,091	-0.1 %	10,813	7.3 %
1981	139,564	-1.7 %	5,915,167	-2.4 %	36,199	-7.4 %	11,153	3.1 %
1982	133,366	-4.4 %	5,923,482	0.1 %	37,042	2.3 %	11,082	-0.6 %
1983	134,119	0.6 %	6,356,666	7.3 %	36,909	-0.4 %	12,346	11.4 %
1984	140,664	4.9 %	7,235,118	13.8 %	42,141	14.2 %	14,725	19.3 %
1985	157,347	11.9 %	8,042,579	11.2 %	41,173	-2.3 %	15,305	3.9 %
1986	166,510	5.8 %	8,405,996	4.5 %	49,044	19.1 %	17,064	11.5 %
1987	175,478	5.4 %	9,575,061	13.9 %	54,065	10.2 %	20,295	18.9 %
1988	177,817	1.3 %	9,956,393	4.0 %	55,879	3.4 %	21,424	5.6 %
1989	189,964	6.8 %	10,485,182	5.3 %	60,327	8.0 %	20,920	-2.4 %
1990	191,856	1.0 %	11,423,838	9.0 %	61,221	1.5 %	21,467	2.6 %
1991	183,932	-4.1 %	10,797,984	-5.5 %	55,213	-9.8 %	23,219	8.2 %

Traffic records since 1949

(continued)

Year	Aircraft movements	Change	Commercial passengers	Change	Air freight [t]	Change	Air mail [t]	Change
1992	192,153	4.5 %	12,018,202	11.3 %	56,847	3.0 %	25,557	10.1 %
1993	192,180	0.0 %	12,731,917	5.9 %	65,276	14.8 %	30,083	17.7 %
1994	199,845	4.0 %	13,497,041	6.0 %	71,807	10.0 %	30,795	2.4 %
1995	213,951	7.1 %	14,867,922	10.2 %	70,519	-1.8 %	35,787	16.2 %
1996	233,254	9.0 %	15,686,095	5.5 %	82,948	17.6 %	35,103	-1.9 %
1997	267,814	14.8 %	17,894,704	14.1 %	103,572	24.9 %	28,073	-20.0 %
1998	278,392	3.9 %	19,321,355	8.0 %	103,850	0.3 %	23,084	-17.8 %
1999	299,070	7.4 %	21,282,906	10.2 %	123,331	18.8 %	23,366	1.2 %
2000	319,009	6.7 %	23,125,872	8.7 %	133,234	8.0 %	23,323	-0.2 %
2001	337,653	5.8 %	23,646,900	2.3 %	135,000	1.3 %	22,668	-2.8 %
2002	344,405	2.0 %	23,163,720	-2.0 %	165,902	22.9 %	22,497	-0.8 %
2003	355,602	3.3 %	24,193,304	4.4 %	156,132	-5.9 %	22,000	-2.2 %
2004	383,110	7.7 %	26,814,505	10.8 %	177,005	13.4 %	21,368	-2.9 %
2005	398,838	4.1 %	28,619,427	6.7 %	208,662	17.9 %	15,215	-28.8 %
2006	411,335	3.1 %	30,757,978	7.5 %	231,736	11.1 %	13,672	-10.1 %
2007	431,815	5.0 %	33,959,422	10.4 %	257,873	11.3 %	14,536	6.3 %
2008	432,296	0.1 %	34,530,593	1.7 %	256,757	-0.4 %	17,707	21.8 %
2009	396,805	-8.2 %	32,681,067	-5.4 %	229,024	-10.8 %	13,126	-25.9 %
2010	389,939	-1.7 %	34,721,605	6.2 %	289,535	26.4 %	12,113	-7.7 %
2011	409,956	5.1 %	37,763,701	8.8 %	302,959	4.6 %	17,472	44.2 %
2012	398,039	-2.9 %	38,360,604	1.6 %	287,074	-5.2 %	18,160	3.9 %
2013	381,951	-4.0 %	38,672,644	0.8 %	284,520	-0.9 %	17,888	-1.5 %
2014	376,678	-1.4 %	39,700,515	2.7 %	305,347	7.3 %	18,027	0.8 %
2015	379,911	0.9 %	40,981,522	3.2 %	337,564	10.6 %	18,801	4.3 %
2016	394,430	3.8 %	42,261,309	3.1 %	355,950	5.4 %	19,171	2.0 %
2017	404,505	2.6 %	44,577,241	5.5 %	372,529	4.7 %	15,988	-16.6 %
2018	413,469	2.2 %	46,253,623	3.8 %	358,411	-3.8 %	16,835	5.3 %
2019	417,138	0.9 %	47,941,348	3.6 %	338,517	-5.6 %	18,455	9.6 %
2020	146,833	-64.8 %	11,112,773	-76.8 %	152,636	-54.9 %	5,820	-68.5 %
2021	153,097	4.3 %	12,496,432	12.5 %	175,353	14.9 %	6,599	13.4 %
2022	285,028	86.2 %	31,642,738	153.2 %	266,862	52.2 %	7,926	20.1 %
2023	302,150	6.0 %	37,037,070	17.0 %	281,867	5.6 %	7,149	-9.8 %

/Appendix

Europe
All European countries including Belarus, Cyprus, Moldova, Russian Federation West of Ural, Turkey and Ukraine. Denmark including Faroe Islands, Portugal including Azores and Madeira, Spain including Canary Islands, Ceuta and Melilla

Middle East
Bahrain, Iran, Iraq, Israel, Jordan, Kuwait, Lebanon, Oman, Qatar, Saudi Arabia, Syria, United Arab Emirates, Yemen

North Africa
Algeria, Morocco, Tunisia, Egypt, Libya

Rest of Africa
The African continent without North Africa

North America
Canada, USA and Greenland

Latin America & the Caribbean
The Americas with the exception of North America as defined above (including Puerto Rico and Virgin Islands). Chile including Easter Islands, Ecuador including Galapagos Archipelago, Falkland Islands (British)

Asia/Pacific
Including Afghanistan, Armenia, Azerbaijan, Georgia, Kazakstan, Kyrgyzstan, Pakistan, Russian Federation East of Ural, Tajikistan, Turkmenistan and Uzbekistan, also Australia, New Zealand and Pacific Islands with the exception of Hawaii, Easter Islands and Galapagos

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