

AIRPORT OPERATIONS

Airport Operations

Dublin Airport has received permission to use the North Runway between the hours of 7 am and 11 pm. The integration of the new runway into the airfield operations is being done gradually in a phased approach. Initially, the runway operated from 9 am to 1 pm, and over the following months, the operational hours were extended to 6 pm.

As the next phase, which started on 1 June 2023, the North Runway will be in use until 8 pm. It is anticipated that these operating hours will be further extended later in the summer, although not before 1 July. The Dublin Airport Authority (daa) will provide advance notice regarding any updates in this regard. #1194.OPS1

Toronto Buttonville Municipal Airport in Markham (Ontario, Canada) is set to cease operations on 30 November 2023. The airport's president, Derek Sifton, announced the closure in a letter, stating that the lease agreement allowing the airport to operate is expiring. The closure comes after years of speculation about the airport's future, with rumours circulating since 2009 when the Sifton family, the previous owners, announced plans for redevelopment. However, planning difficulties and a joint venture with Cadillac Fairview, a developer, caused delays. In 2018, it was decided that the airport would continue operating until 2023. The closure marks the end of an era for Buttonville Airport. #1194.OPS2

Vancouver International Airport (British Columbia, Canada) has launched a three-year Accessibility Plan called "Beyond Accessibility" to enhance its commitment to creating an inclusive and accessible airport experience. The plan, developed in collaboration with community partners, aims to exceed compliance with the Canadian Transportation Agency (CTA) regulations. It focuses on seven areas outlined in the Accessible Transportation for Persons with Disabilities Regulations (ATPDR), including terminal facilities, communication technology, support programs, and procurement practices. YVR has a history of prioritizing accessibility and has incorporated customer-inspired features in its facilities, such as private washrooms, a quiet room, and animal relief areas. The airport offers programs like the Hidden Disabilities Sunflower program and collaborates with organizations like the Pacific Autism Family Network (PAFN) to support neurodiverse individuals and their families. YVR's Accessibility Plan will be updated every three years to continually improve accessibility practices in collaboration with community partners such as the Canadian Mental Health Association, CNIB, Canucks Autism Network (CAN), and others. #1194.OPS3

A coalition consisting of regional airports, businesses, and chambers of commerce in the United States is opposing potential changes to airport operations in Washington (D.C., United States). Specifically, they are opposing changes to the slot and perimeter rules at Reagan National Airport (DCA). These rules have been overseen by the Metropolitan Washington Airports Authority (MWAA) since 1986 and were implemented to manage the airport's workload, protect customer numbers at Dulles International Airport (IAD), and limit noise for residential areas. Recent legislation in the US Congress has proposed expanding the number of flight slots at DCA beyond the current limit of 40 a day to 96 a day and allowing flights to destinations beyond the existing perimeter limit. The Coalition to Protect America's Regional Airports (CPARA) argues that this could lead airlines to prioritize longer-haul direct flights to more distant cities, potentially reducing connecting flights

to smaller regional airports. They believe this change would negatively impact regional airports and the local communities that rely on them for economic development and convenient travel.

The CPARA estimates that the proposed legislation, called the Direct Capital Access Act, could add approximately 9,250 additional passengers per day or 3.37 million per year at DCA. This would strain the airport, which already handles 9 million more passengers annually than it was designed for. The MWAA, which also opposes the legislation, has revealed that DCA's main runway is already the busiest in the US, with an average of 819 commercial operations per day.

In contrast, the Capital Access Alliance (CAA) supports the proposed changes and dismisses the claims made by the CPARA as baseless. The CAA argues that the DCA Act aims to offer air travellers more choices at lower prices and accuses opponents of trying to limit competition and maintain the status quo in Washington with misleading arguments.

The opposing groups are engaged in a debate over the potential impact of the proposed legislation, with the regional airport coalition expressing concerns about the effects on smaller airports and the surrounding community, while the supporters argue that it would benefit travellers and promote competition. #1194.OPS4

United Airlines has announced plans to expand its operations at Denver International Airport (Arizona, United States), including adding 35 flights, six new routes, a dozen gates, and three lounges. The expansion aims to meet the growing demand in Denver and provide customers with more flexibility and options. United will offer new non-stop flights to destinations not currently served by any other airline at Denver. The airline will also enhance its infrastructure with the addition of 12 new gates, a new check-in lobby, upgraded technology at gates, and renovated United Club lounges. The expansion is part of United's nearly USD 1 billion investment to improve the travel experience at DEN. The airline's increased presence at DEN aligns with the airport's strategic plan to accommodate 100 million passengers in the next decade. United plans to hire over 2,300 new employees in Denver this year and is the largest private employer in the city. #1194.OPS5

Brazil's federal government plans to reduce the number of flights and consequently the passenger flow at Santos Dumont Airport (Brazil) to approximately 8.5 million people in 2024, said the Minister of Ports and Airports, Márcio França. This is another attempt by the government to boost the underutilized Galeão Airport.

According to authorities in Rio de Janeiro, Galeão, which has been managed by Changi Airports International since 2014, faces competition from Santos Dumont Airport, located in the central region of the city.

Last year, Santos Dumont Airport served around 10 million passengers, while Galeão had less than 6 million. The international terminal was granted in 2013 for BRL 19 billion, with infrastructure improvements and investments made in preparation for the World Cup, Olympics, and potential tourism expansion, increasing the airport's capacity to over 30 million passengers annually.

The reduction in flights at Santos Dumont is expected to begin in August of this year, according to the minister. The aim is to improve safety and comfort, as the airport is currently overcrowded.

The Minister stated that without these changes, Santos Dumont could handle a traffic volume of 10.5 million people this year. However, the state-owned operator Infraero, which currently operates Santos Dumont, claimed that the airport has the capacity to handle 15.3 million passengers per year and that there has been no saturation or evidence of a decline in service quality in 2022.

The federal, state, and municipal governments have been discussing solutions and alternatives for Galeão Airport. The concessionaire, Changi, initially announced its intention to return the concession but later reversed its decision. This action by the company is being evaluated by the Federal Court of Audit (TCU)

for its legality. The concessionaire has also requested a re-evaluation of its annual debt of BRL 1.3 billion with the government.

The concession for Galeão Airport is valid until 2039. The minister stated that if no other solution is found, it will have to be re-awarded, similar to what was done with São Gonçalo do Amarante Airport (RN). The airport recently underwent a new auction, in which Zurich Airport emerged as the winner. #1194.OPS6

Starting from August 7th, Aerolíneas Argentinas will operate flights with Airbus A330 aircraft from the revamped Buenos Aires Aeroparque Airport (Argentina) to Miami, New York, El Calafate, Iguazu, and Ushuaia. The A330 aircraft are the largest capacity planes operated by Aerolíneas Argentinas and are part of their long-range fleet.

These aircraft are authorized to operate at the "Jorge Newbery" Aeroparque, formerly a domestic airport, thanks to the set of works that were inaugurated in late 2022, including a new 2,690-meter runway, which is 590 meters longer than it was four years ago.

The expansion also included widening the runway to 60 meters, according to the most demanding international standards. A new lighting system was installed, elevating the airport's category to Level III. This allows for safer flying in adverse weather conditions and instrument operations.

The international passenger terminal was rebuilt and expanded, adding more surface area, more boarding gates, new technology, more customs, immigration, and control positions handled by the Airport Security Police. Additionally, services were expanded with more dining options and shops.

By the time operations begin on 7 August, the new aircraft apron, new vehicular accesses, and passenger facilities for connections will be ready. Works have also been carried out in the passenger terminal, pre-boarding area, and various public areas of the airport. #1194.OPS7

Wizz Air, a European ultra-low-cost carrier, is expanding its base in Georgia by allocating an additional Airbus A321neo aircraft. With this expansion, Wizz Air's base in Kutaisi will have a total of four aircraft, enabling the launch of new routes and increased frequency on existing routes from David the Builder Kutaisi International Airport. Passengers will now have the option to fly to Copenhagen, Denmark, bringing the total number of routes from the base to 28. The increased aircraft capacity will strengthen Wizz Air's market presence in Georgia and provide more travel options for customers. Kutaisi International Airport, the second largest airport in Georgia, serves as a hub for Wizz Air and other airlines. The expansion is expected to create local jobs and contribute to the stable development and growth of the airport. #1194.OPS8

Ground Handling

Menzies Aviation, a service provider to airports and airlines, and owned by Agility Public Warehousing Co., is targeting both organic growth and bolt-on acquisitions as it aims to consolidate the industry amid a transition to electric equipment, according to Bloomberg.

Menzies expects larger players to acquire smaller rivals as the industry focuses more on sustainability and environmental, social, and governance (ESG) agendas. The company plans to expand its operations in southern and eastern Europe, the UK, Latin America, and Southeast Asia. Menzies aims to increase its number of locations from over 250 to 300 by late 2024 or early 2025, with potential for up to 450 in the long term. The company is committed to becoming carbon neutral by 2045 and is gradually transitioning to electric equipment. Menzies is nearly prepared for summer, with only 1,600 job openings left to fill. Agility acquired Menzies in 2022 and retained the company's name and identity since its founding in 1833 by John Menzies. #1194.OPS9

Menzies Aviation has established a joint venture with MYAirline to create a ground services company in Malaysia. The new partnership will see Menzies provide ground services at Kuala Lumpur International Airport (KUL) initially serving MYAirline at Terminal 2. KUL will be Menzies' first location in Malaysia, where there are opportunities for growth and expansion as the aviation sector continues its Covid-19 pandemic recovery. The entry into Malaysia complements Menzies' existing operations in three other Southeast Asian countries – Indonesia, China-Macau and Thailand.

James Wong, senior vice president southeast Asia & China, Menzies Aviation, said: "We are delighted to be entering Malaysia through this new partnership with MYAirline. Kuala Lumpur International Airport is the largest and busiest airport in Malaysia and will provide an excellent base for our Malaysian operation." Kuala Lumpur-based MYAirline was recently established as a low-cost carrier with nine domestic routes. Two international routes, connecting Malaysia and Thailand, are set to launch next month. #1194.OPS10

Menzies Aviation has expanded its partnership with i6, a digital fuel management technology company, to include four more UK airports: London Stansted, Leeds Bradford, Birmingham, and Teesside International. Menzies, the world's largest independent into-plane fuelling provider, has been using i6 technology at various airports globally, including Los Angeles, Orlando, London Heathrow, and Liverpool.

The secure i6 technology enhances real-time operations in airport fuel supply chains, improving efficiency and enabling accurate data and paperless operations. The technology deployed at the additional UK airports includes Fusion6, an into-plane refuelling platform, and Reconcile6, a fuel inventory management platform. These platforms offer cost savings, improved safety, and real-time refuelling information and optimization.

The Fusion6 platform integrates live data from airports and airlines, providing remote visibility of ground fuelling operations and ensuring efficient refuelling. Reconcile6 tracks fuel movement across the airport supply chain, offering real-time inventory management and accounting.

The partnership with i6 also offers access to eHandshake® and Perspective6. eHandshake® provides real-time refuelling connectivity for airlines and into-plane operators, while Perspective6 offers a global view of airline and supplier information with advanced reporting. These features allow for more effective supply chain management, data collection, and fuel efficiency identification.

Overall, the expanded partnership between Menzies Aviation and i6 brings advanced digital fuel management technology to more UK airports, improving operational efficiency, safety, and data accuracy. #1194.OPS11

Commercial & Marketing

Avinor has announced plans to launch major food and beverage (F&B) tenders at Oslo, Stavanger, and Bodø airports in September, according to the Moodie-Davitt Report. The company aims to diversify the F&B offerings, develop new concepts and formats, and collaborate with partners that offer technological innovation. Avinor is inviting potential partners from around the world to participate in the tenders, emphasizing that the process will be open, transparent, and fair. The contracts will cover approximately 35 units at Oslo Airport, ten at Stavanger Airport, and two at Bodø Airport, with an estimated value of EUR 450 million over the contract period.

The key tender at Oslo Airport includes bakeries, coffee shops, fast-food outlets, gastropubs, and casual dining establishments. The F&B channel at Oslo Airport currently generates an annual turnover of around EUR 80 million from approximately 6.5 million customers. The F&B business at Stavanger Airport is valued at around EUR 8 million per year.

Tenders will be issued in mid-September, with a submission deadline in mid-January and contract awards by May 2024. Operations under the new contracts are expected to begin in January 2025.

Avinor executives highlighted the importance of F&B in the airport experience and expressed the company's desire to create a more diverse and appealing F&B offer. They also emphasized the need for partners who are investing in digital solutions to enhance the connection with travellers. Avinor is interested in innovative concepts and formats that integrate new technologies and provide exceptional service.

The F&B mix at the airports will become more diversified, with Asian, Italian, and American cuisine, as well as healthy concepts and sweets & treats, in high demand. Sustainability is also a key consideration, and Avinor is targeting partners with a genuine focus on food waste reduction and energy consumption. Avinor welcomes potential bidders from beyond its existing network, including international, national, and regional players. The company has adapted its contractual model to provide greater flexibility and risk sharing with its partners, including the removal of fixed rent and the introduction of flexible pricing based on passenger levels.

Overall, Avinor aims to exceed customer expectations, drive revenue, and create appealing offers in collaboration with its partners. The company believes that aligning with partners who share its goals in terms of service, product quality, and technology will lead to a more successful and sustainable business. #1194.OPS12

London Luton Airport (LLA) has partnered with the London Blitz American football team to promote its new Luton Airport Express service. To alleviate stress for passengers, LLA will offer a complimentary luggage-carrying service on May 10, where members of the football team will help carry luggage from London St. Pancras station to the train. Research by LLA revealed that the journey to the airport is a significant source of stress for 59% of holidaymakers, with unexpected travel delays and heavy luggage being the main causes. The new Luton Airport Express service, including the four-minute DART shuttle, aims to make LLA more accessible and convenient for travellers. The service departs from St Pancras International every 30 minutes with an average journey time of 32 minutes. #1194.OPS13

Spanish airport authority, Aena, has awarded four duty-free retail contracts covering 23 airports and restarted the tendering process for the Madrid and Catalonia packages after receiving no bids initially. The contracts were awarded to Dufry for Andalusia-Mediterranean and Balearic Islands, Canariensis (Dufry) for Canary Islands, and Lagardère Travel Retail for Northern Airports. These contracts account for 56% of the total Minimum Guaranteed Rents (MAG) set for the six-lot duty-free tender. The bids presented exceeded Aena's rents by 17% and improved the 2023 rents by 28%. Aena plans to launch a new process for Madrid and Catalonia duty-free shops with the same conditions once the previous 23 airports have been awarded. Thirteen duty-free retailers who showed interest in the prior process will be invited. The Spanish Association of Commercial Operators of Airports, Ports, and Stations (AEOCAPE) expressed surprise at Aena's decision and called for collaboration between the airport monopoly and stakeholders to protect their interests. #1194.OPS14

Areas, a Barcelona-based F&B specialist, has secured a contract to manage over half of the gastronomic offerings at Guadalajara Airport in Mexico. The company will operate eight new establishments in addition to the nine it currently manages, with projected sales of USD 150 million over the seven-year concession period. The offering will feature a mix of international brands like Carls Jr, Subway, Sbarro, and KFC, as well as local concepts including Tacos Don Miguelón, Maestro Dobel Tequila, Moshi, and Cantina La Imperial. Areas plans to invest over USD 5 million in the transformation of

the airport's gastronomic offerings, with the renewal set to commence in August. This contract win strengthens Areas' presence in Mexico, where it already manages 140 points of sale, 82 establishments in 22 airports, and 58 convenience stores in large tourist complexes. The company aims to continue expanding its activity in Latin America and is focused on securing more tenders in South America and North America. #1194.OPS15

HMSHost International, in partnership with Qatar Airways, is expanding its presence in the Middle East with the addition of 10 new stores at Hamad International Airport (HIA) in Doha, Qatar. This expansion is part of the joint venture between HMSHost International and Qatar Airways Group (Qatar Duty Free) and is connected to the terminal expansion project at HIA. With the opening of these new stores, the joint venture now has a total of 20 stores operating at the airport. The portfolio of brands includes HMSHost's proprietary and bespoke concepts, offering a wide range of food and beverage options tailored to the needs of travelers at HIA. The brands include VIT, a juice and food bar; Bar Motta, inspired by Milanese sweets; Enoteca Giardino, a wine bar with a view of an indoor garden; Asia Street Cooking Ltd, offering Asian-fusion food; Grab&Fly, serving drinks and quick bites; KFC, Burger King, Costa Coffee, and Wagamama, among others. The joint venture will continue to expand with the opening of four more stores in mid-2023, including Italian Kitchen Terracotta, Giraffe, Le Petit Belge, and The Dosa Factory. #1194.OPS16

Korean travel retailer Lotte Duty Free has reopened its store at Seoul Gimpo Airport after a complete renovation. The company secured a 10-year contract focused on beauty, fashion, and other categories, excluding liquor and tobacco, in October 2021. Sales through Lotte's temporary stores increased by over 60% in the last three months. The airport has experienced a 138% increase in international passenger traffic from January to April 2023 compared to the previous four months. The renovated store now offers a variety of international cosmetics brands and features a large LED screen promoting Korean tourism and culture. Lotte will unveil a large-scale sculpture called "Travel Scene" next month to enhance the theme of the joy of travel. To celebrate the reopening, customers were given tickets to the Lotte Duty Free Family Concert, and free gifts are being offered based on the purchase amount. Lotte Duty Free has also launched a Sparkling Summer promotion, giving customers a chance to win tickets to Sydney or Tokyo and stays at Lotte Hotel Jeju by making a purchase of USD 300 or more until 30 July. #1194.OPS17

Auckland Airport is transitioning to a single duty-free retailer model, with Lagardère AWPL having taken over on 1 June. Aelia Duty Free, owned by Lagardère Travel Retail, won an extension of its contract until mid-2025 and will be the sole duty-free retailer at the airport. Aer Rianta International (ARI), trading as The Loop Duty Free, will no longer operate at the airport. As part of the transition, around 90% of existing duty-free staff will be transferred to Aelia Duty Free, with new roles being created.

The shift to a single duty-free operator will allow for a larger range of products without duplications. Auckland Airport plans to initiate a tender process for a long-term duty-free contract within the next year. #1194.OPS18

Christchurch International Airport Ltd (CIAL) in New Zealand has invited expressions of interest (EOI) from companies to manage ten food and beverage venues across various areas in the airport. These venues are located in different areas, including departures landside, domestic departures airside, international departures airside, and international arrivals landside. The airport, which serves as the South Island's main gateway and is the second-largest airport in New

Zealand in terms of passenger volume, aims to refresh its F&B offerings in response to changing traveler demands and the evolving F&B scene in Christchurch.

The ten F&B outlets, covering a total of approximately 350 m², will be launched to the market for the first time in 12 years, as existing leases are set to expire in June 2024. The airport is seeking a range of F&B operators who can provide a stellar dining experience, incorporating fresh and local ingredients. The goal is to attract passengers to spend more time in the terminal and enjoy the best of Canterbury.

The available F&B spaces include an all-day restaurant, a hero coffee/café outlet, a quick-service restaurant, and food-court-style units in the departures landside precinct. There is also an outlet in the domestic departures airside precinct, one in the international departures airside precinct, and one in the international arrivals landside precinct. Lease terms range from three to seven years, depending on the specific outlet.

Christchurch Airport, known for its high passenger satisfaction ratings, aims to find F&B operators that align with the unique and dynamic region it serves. The airport is open to discussions with operators interested in managing all or a few of the outlets. The EOI process is being facilitated by The Mercurius Group, a specialist airport commercial advisory firm. Interested parties can request EOI documents by contacting Nic.Sullivan@cial.co.nz. #1194.OPS19

Traffic

In May, Swedavia's airports in Sweden experienced a continued recovery in aviation, with more than 3 million passengers in a single month for the first time since the start of the COVID-19 pandemic. This represents a 14% increase compared to May last year and is equivalent to 83% of the pre-pandemic level. The demand for international flights in Europe remains strong, particularly driven by airline investments in improved connectivity, primarily through Stockholm Arlanda Airport. During the Ascension Day holiday in late May, Arlanda recorded its highest passenger volume since the start of the pandemic, with over 40,000 departing passengers in a single day.

Travel at several airports, including Arlanda, is approaching pre-pandemic levels, and bookings indicate strong anticipation for summer travel. The summer traffic program focuses on enhanced connectivity with Europe and the US, offering more than 300 destinations, approximately 90% of the pre-pandemic level. New routes will be launched at Swedavia's airports in June and July, further expanding the destination offerings.

Overall, more than 3 million passengers flew via Swedavia's airports in May, with international travel increasing by 17% compared to May 2022 and domestic travel increasing by 9%. Stockholm Arlanda Airport saw a 16% increase in passengers, primarily driven by international travel, which increased by 18%. Göteborg Landvetter Airport had a 14% increase in passengers, and Malmö Airport experienced a 1% increase. Bromma Stockholm Airport recorded a 14% increase, mainly in international travel. The performance of Swedavia's six regional airports varied in May, with Åre Östersund, Umeå, Ronneby, Luleå, and Kiruna airports showing positive trends compared to the pre-pandemic levels. #1194.OPS20

The traffic numbers at Düsseldorf airport (Germany) during the recent Pentecost holidays increased compared to the previous Easter holidays. From Thursday 25 May to Tuesday 30 May, the airport recorded approximately 2,700 flight movements and 380,000 passengers. The busiest day was Friday, 26 May, with around 480 movements and 69,000 passengers.

Lars Redeligx, CEO of Flughafen Düsseldorf GmbH, stated that the rehearsal for the upcoming holiday season was successful. The favourable vacation weather and increasing desire to travel during the Pentecost holidays resulted in traffic results that closely approached the expected numbers for the summer holidays. Passengers experienced a well-functioning airport almost consistently. This

demonstrates that the #OffBlock-#QualityInitiative for smoother passenger processes is effective even after the Easter holidays.

The passenger and baggage handling processes went smoothly for the most part. Only on the busy Friday, there were some queues at individual check-ins, and a few arriving passengers had to wait slightly longer for their luggage in the afternoon. Orderly and efficient procedures also characterized the security checks. On the busiest days, Friday and Saturday, an average of 75% of passengers passed through the controls within ten minutes. On the remaining days, even 90% of passengers cleared security checks in less than ten minutes. During peak hours, waiting times were slightly higher for short periods, averaging between ten and 15 minutes, but not exceeding a maximum of 32 minutes.

#1194.OPS21

In the first months of 2023, Turin Airport (Italy) achieved a new record with 1,859,610 passengers passing through the airport between January and May. Compared to the same period in 2022 (1,507,311 passengers), this number represents a growth of 23.4%. Additionally, the number of passengers recorded this year has increased by 10% compared to 2019 when there were 1,684,264 passengers. Moreover, with a 7% increase over its previous best result in 2017, Turin Airport has surpassed its own record.

Furthermore, May of this year has been the best month in the history of Turin Airport. A total of 393,118 passengers travelled through the airport, which is 4% more than last year (378,361 passengers) and 26% more than May 2019 (313,028 passengers).

The excellent results achieved in the first five months of 2023 also demonstrate growth compared to the national trend in the airport system. While Italian airports on average recorded a -2.4% compared to the same period in 2019, Turin Airport experienced a +7% growth. #1194.OPS22

During May 2023, Athens airport's passenger traffic amounted to 2.54 million, 23.4% above May 2022 (which was still impacted by the COVID-19 pandemic), but also 11.1% higher than the pre-COVID May 2019. Domestic and international passengers surpassed the 2022 levels by 20.6% and 24.8% and the 2019 levels by 15.6% and 9.1%, respectively. Overall, during the first five months of 2023, the airport's passenger traffic totalled 9.15 million, above the 2022 levels by 39.9% and higher than the respective 2019 levels by 5.9%. Analytically, domestic, and international passengers surpassed the 2022 levels by 29.9% and 45.1%, while also exceeding the 2019 levels by 7.9% and 4.9%, respectively. #1194.OPS23

The Hellenic Civil Aviation Authority (HCAA) Governor, Georgios Dritsakos, predicts that passenger traffic at all Greek airports in 2023 will surpass pre-Covid levels of 2019. During the 6th HCAA "Air Transport Today and Tomorrow" conference, Dritsakos highlighted the ongoing modernization of air navigation systems and infrastructure at Greek airports. In April 2023, passenger traffic showed a positive trend, with a 20.3% increase compared to 2022 and a 15% increase compared to 2019. The country's regional airports managed by Fraport exceeded pre-Covid levels, handling 1.6 million passengers, while Athens International Airport saw a 7.6% rise in passenger traffic to 2.1 million travellers. From January to April 2023, Greek airports witnessed a 7.4% increase in passenger arrivals compared to 2019 and a 38.4% increase compared to the same period in 2022. Dritsakos also addressed the challenges facing the aviation sector, including global demand, digitization, environmental concerns, infrastructure, legislation, and flight safety. The HCAA is actively modernizing systems, expanding staff, implementing safety measures, and advocating for Greece's interests in international organizations to tackle these challenges. #1194.OPS24

The air traffic report for April 2023 released by European airport trade body ACI EUROPE shows passenger traffic made further gains towards a full recovery, but with wide performance divergence across the continent. Passenger traffic in the European airport network grew by +21.1% in April compared to the same month last year. Considering that travel restrictions had largely been eased in Europe by that time last year, such increase is significant. As a result, when compared to pre-pandemic (April 2019) levels, volumes in April this year stood at -7.6% - a further improvement over the preceding months (Q1 was at -10.6%).

EU+ airports (EU, EEA, Switzerland and UK) saw passenger traffic increase by +19.1% in April compared to the same month last year – resulting in volumes being -8.1% below their pre-pandemic (April 2019) levels.

Airports in **Iceland** (+14.5%), **Cyprus** (+11.9%), **Greece** (+11%), **Portugal** (+10.7%), **Bulgaria** (+8.7%) and **Malta** (+8.4%) well exceeded their pre-pandemic volumes and posted the best results. Conversely, those in **Slovenia** (-39.8%), **Germany** (-26.1%), **Slovakia** (-25.9%) and the **Czech Republic** (-23.7%) remained the farthest from a full recovery.

The performance of the largest markets reflected the leisure-driven nature of the recovery and the increasing market penetration of ultra-Low Cost Carriers - with airports in **Spain** (+2.7%) and **Italy** (+1%) achieving a full recovery, followed by those in the **UK** (-9.3%), **France** (-12.8%) and – as mentioned above – Germany.

At airports in the rest of Europe, passenger traffic grew by +35.3% in April compared to the same month last year, resulting in volumes being just -4.1% below pre-pandemic (April 2019) levels. While airports in **Ukraine** (-100%) lost all passenger traffic and those in **Moldova** (-19.9%) were also impacted by the conflict, airports in **Russia** (-2.8%) were close to their pre-pandemic volumes due to demand shifting to domestic and non-EU+ markets. This kept boosting the performance of airports in **Armenia** (+95.1%), **Uzbekistan** (+75.4%) and **Serbia** (+24.2%).

Airports in **Turkey** (-1.5%) nearly recovered their pre-pandemic volumes, while those in **Albania** (+115.8%), **Kosovo** (+53.7%) and North Macedonia (+21.7%) achieved impressive growth.

Passenger traffic at the Majors (top 5 European airports in 2019) grew by +23.4% in April compared to the same month last year – slightly above the average growth rates of other segments of the airport industry. However, volumes still remained -9.8% below pre-pandemic (April 2019) levels due to lower hub carrier capacity deployment and the subdued impact of the re-opening of China.

London-Heathrow led the current top 5 European airport league in April, welcoming 6.4 million passengers. This represented an increase of +25.9% over the same month last year and a decrease of -5.9% when compared to pre-pandemic (April 2019) levels.

Istanbul came second with its passenger traffic at +34.3% over April 2022 and an impressive +10.8% over pre-pandemic levels. The Turkish hub was followed by **Paris-CDG** (+19.3% over April 2022, -15.5% over pre-pandemic), **Amsterdam-Schiphol** (+15.6% over April 2022, -16% over pre-pandemic) and **Madrid** (+20.6% over April 2019, -3.5% over pre-pandemic).

Amongst other large airports and when compared to pre-pandemic levels, the best performance came from those airports relying on leisure/VFR demand and/or Low Cost Carrier traffic: **Lisbon** (+5.6%), **Dublin** (+0.9%), **Palma de Mallorca** (+8.7%), **Athens** (+7.6%) and **Tel Aviv** (+2.4%).

These same recovery drivers kept boosting a number of large ultra-Low Cost airport bases, which far exceeded their pre-pandemic passenger traffic volumes: **Beauvais** (+40.8%), **Bergamo** (+17.2%) and **Charleroi** (+11.2%).

They also benefitted regional and smaller airports which on average saw passenger traffic just above pre-pandemic levels at +1.6%. Those serving popular tourist destinations and/or relying on LCC traffic posted the best results – such as **Trapani** (+304.6%), **Memmingen** (+54.7%), **Varna**

(+54.4%), **Reus** (+43%), **Funchal** (+38.7%), **Menorca** (+37.7%), **Turin** (+23%), **Palermo** (+20.2%) and **Kaunas** (+20.1%).

Freight traffic across the European airport network decreased by -7.8% in April compared to the same month last year, and by -10.5% compared to pre-pandemic (April 2019) levels.

Amongst the top 10 European airport for freight traffic, the best performances when compared to pre-pandemic volumes came from: **Istanbul** (+36%), **Milan-MXP** (+21%), **Liège** (+17%), **Madrid** (+14%) and both **Luxembourg** and **Koln-Bonn** (+4%).

Aircraft movements increased by +11% across the European airport network compared to the same month last year and stood at -9.9% compared to pre-pandemic levels.

During the month of April, airports welcoming more than 25 million passengers per year (Group 1), airports welcoming between 10 and 25 million passengers (Group 2), airports welcoming between 5 and 10 million passengers (Group 3) and airports welcoming less than 5 million passengers per year (Group 4) reported an average adjustment of -10.3%, -6.6%, +1.7% and +1.5%, as compared to pre-pandemic traffic levels (April 2019).

The airports that reported the highest increases in passenger traffic for April 2023 when compared with April 2022 are as follows:

- **Group 1:** Istanbul IST (+10.8%), Palma de Mallorca (+8.7%), Athens (+7.6%), Lisbon (+5.6%) and Dublin (+0.9%).
- **Group 2:** Porto (+17.6%), Milan BGY (+17.2%), Naples (+15.8%), Málaga (+10.9%) and Tenerife TFS (+9%).
- **Group 3:** Sochi (+95.2%), Rhodes (+39.3%), Ibiza (+28.4%), Belgrade (+23.9%), and Palermo (+20.2%)
- **Group 4:** Tirana (+115.8%), Yerevan (+95.1%), Memmingen (+54.7%), Varna (+54.4%) and Pristina (+53.7%).

#1194.OPS25

In April 2023, stronger international travel demand led the increase in traveller's served by John F. Kennedy International (New York, United States), Newark Liberty International and LaGuardia airports, which collectively saw an 8 percent increase in international travellers compared to the previous month. Altogether, the three major airports served a total of 12 million passengers in April, with JFK, EWR and LGA exceeding passenger volume levels by 1 percent, 6 percent, and 3 percent, respectively, compared to its previous record for the month during pre-pandemic April 2019. EWR served nearly 4.2 million travellers, while 5.2 million passed through JFK and 2.7 million came through LGA. #1194.OPS26

Passenger traffic at Los Angeles International Airport (California, United States) saw significant growth in April 2022, with international guests increasing by over 195% compared to April 2021. This marked the second consecutive month of international traffic exceeding one million passengers. The total number of passengers at LAX in April 2022 was 5,441,504, reflecting a 76.96% increase from the same period in 2021. International passenger numbers reached 1,253,222, the highest since February 2020, representing a 195% surge from April 2021 when there were 424,221 international passengers. Domestic passenger traffic also increased by 58% during the same period, with 4,188,282 passengers in April 2022.

In terms of air cargo, LAX handled a total of 234,007 tons in April 2022, experiencing a slight decrease of 6.83% compared to April 2021. #1194.OPS27

Malaysia Airports Holdings Bhd (MAHB) announced that its network of airports experienced over nine million passenger movements in April 2023, despite the Ramadan period. The increase in passenger traffic began in the third week of April, coinciding with the Aidilfitri celebrations on April 22, 2023.

Since December 2022, MAHB has consistently recorded more than nine million passengers each month, with December being the peak month. In April 2023, international passenger movements reached 4.3 million, equivalent to 76.8% of the passenger levels in April 2019. Domestic passenger movements accounted for 4.8 million passengers, reaching 78.4% of April 2019 levels.

Even during the first three weeks of April, which coincided with Ramadan, Malaysia's passenger movements exceeded six million. The airports have been handling this volume steadily since December 2022. Both the international and domestic sectors showed positive weekly passenger trends, with a doubling of passenger numbers each week. This growth was attributed to factors such as the Aidilfitri celebrations, the resumption of flights by China Southern from Guangzhou to Kota Kinabalu International Airport, and Air China from Beijing to Kuala Lumpur International Airport.

MAHB's Istanbul Sabiha Gökçen International Airport also experienced significant growth in April 2023, with a 31.7% increase in total passenger movements compared to April 2022. The airport handled 2.8 million passengers, reaching 93.8% of the passenger levels recorded in 2019. International passenger movements at the airport reached 1.5 million, the highest volume recorded in 2022 during the peak summer travel season and the highest so far in 2023. Domestic passenger movements were also encouraging, totalling 1.3 million passengers, slightly higher than in March. #1194.OPS28

Guangzhou Baiyun Airport (Guangdong province, China) has released its production and operation data for May 2023. The airport witnessed an impressive growth in various key metrics. The passenger throughput in May reached 5.077 million passengers, marking a significant year-on-year increase of 584.49%. Additionally, the cargo and mail throughput for the same period amounted to 157,000 tons, exhibiting a year-on-year increase of 4.46%. The number of aircraft take-offs and landings in May recorded 37,000 sorties, demonstrating an impressive year-on-year increase of 254.49%. #1194.OPS29

Changsha Huanghua International Airport (Hunan province, China) has exceeded 10 million passengers, becoming the first airport in the central region of China to achieve this milestone in 2023. Changsha Airport has planned 4,960 flights per week, connecting to 108 domestic airports and adding (or resuming) multiple domestic routes such as Aksu, Altay, Guilin, Hulunbuir, Shijiazhuang, Tengchong, Wushan, Yan'an, and Yangzhou.

The international passenger market is also recovering. From January to May of this year, Changsha Airport handled 94,000 international passengers and had 1,320 international take-offs and landings. It has gradually resumed operations on routes to 14 cities, including London, Nairobi, Seoul, and Bangkok. Currently, Changsha ranks among the top in the central region for international routes, with flights to 10 cities such as London, Nairobi, Bangkok, and Seoul. The next step is to plan the opening and resumption of international routes to Osaka, Singapore, Dubai, Kuala Lumpur, and other destinations. #1194.OPS30

Cargo Terminals

Deutsche Bahn AG is considering the sale of its DB Schenker logistics unit, which could be valued at up to EUR 20 billion (USD 21.3 billion), to a financial or strategic investor, according to [Bloomberg](#). The German railroad operator is exploring options to sell a stake or fully divest the unit. A final decision will depend on its financial benefits for Deutsche Bahn and potential growth opportunities for Schenker. The sale would help Deutsche Bahn reduce debt and modernize its domestic railroad

operations. Potential bidders for Schenker include rival logistics companies such as DSV, Deutsche Post, and Kuehne + Nagel, as well as private equity firms like Carlyle Group and CVC Capital Partners. Advisory roles for the sale have been assigned to banks like Goldman Sachs and Morgan Stanley. The timing of the sale is yet to be determined, with Deutsche Bahn proceeding cautiously and without pressure.

#1194.OPS31

Geodis, a transport and logistics services provider based in France, has acquired Swiss freight forwarder ITS - International Transport & Shipping Ltd. The acquisition is part of Geodis' strategy to establish a global end-to-end network and better serve its customers, particularly in Switzerland where many multinational companies, including those in the pharmaceutical industry, are located. ITS specializes in high-tech "special services" for industries such as automotive, industrial, and defence, offering transportation and logistics solutions for dedicated projects and oversized equipment. In addition to its special services, ITS provides standard ocean freight, general cargo services, and other ancillary services. With the acquisition, Geodis aims to expand its service offerings and leverage ITS's expertise and global footprint to navigate the complexities of the supply chain environment. ITS will become part of Geodis' Global Freight Forwarding line of business and will report to the Europe region.

Geodis has also announced that it has obtained the International Air Transport Association's (IATA) Center of Excellence for Independent Validators in Pharmaceutical Logistics (CEIV Pharma) certification for seven sites across the Americas region. This certification strengthens GEODIS' capabilities in air freight temperature-controlled pharmaceutical shipments and supports its goal of establishing healthcare logistics as a key vertical. With a total of 27 CEIV Pharma certified sites worldwide, GEODIS ensures compliance with industry standards, regulations, and guidelines for the handling and transport of pharmaceutical products. The certification reinforces GEODIS' commitment to delivering high-quality service to its clients in the healthcare industry and demonstrates its dedication to meeting global standards for pharma logistics. The certified sites are located in the United States, Latin America, and Canada, including major airports such as Chicago O'Hare, Atlanta, Los Angeles, Newark, Mexico City, Sao Paulo, and Toronto. This achievement aligns with GEODIS' strategy of providing integrated solutions for pharmaceutical customers across different regions and lines of business.

#1194.OPS32

IAG Cargo has inaugurated a new cargo handling facility at London Heathrow Airport (United Kingdom), which enables the company to significantly increase its capacity for handling premium loose shipments. The state-of-the-art facility, called New Premia, spans over 10,000 square meters and is semi-automated. It has been equipped with bespoke IT systems and integration capabilities to efficiently manage freight movements and allocations. The facility features 11 new landside doors to expedite the collection and drop-off of cargo. It also includes a temperature-controlled Constant Climate Quality Centre (CCQC) with dedicated cool cells, offering temperature facilities ranging from +2°C to +8°C (COL), +15°C to +25°C (CRT), and -20°C (FRO) to ensure the safe handling of sensitive shipments. The New Premia facility is certified under IAG Cargo's Good Distribution Practice (GDP) WDA license issued by the UK Medicines & Healthcare Regulatory Agency. The facility employs ground-breaking technology, including four large transfer vehicles that autonomously move cargo through the facility and integrate with IAG Cargo's Warehouse Management System. David Shepherd, CEO of IAG Cargo, emphasized that the new facility and IT systems investment will enhance operational performance and support global trade by optimizing cargo movement. #1194.OPS33

Air India SATS Airport Services, the 50:50 joint venture company (JVCo) between SATS S58 - 1.52% and Air India, has entered into concession agreements with Yamuna International

Airport Private Limited on 30 May. The JVCo was selected to build a multi-modal cargo hub at the upcoming Noida International Airport in Jewar, Uttar Pradesh, in India, on 13 February. The Noida International Airport and the cargo hub are expected to commence operations by the end of 2024. The cargo hub will be financed through a mix of internal cash resources and external bank borrowings. #1194.OPS34

Bermuda Skyport Corporation Limited (Skyport), the developer and operator of Bermuda's L.F. Wade International Airport, is inviting qualified companies to express their interest in developing, operating, and maintaining a newly renovated Cargo Terminal at the airport. The 18,000 ft² terminal will include facilities for customs, administration offices, cargo processing and storage space, screening areas, refrigeration for pharmaceuticals and perishables, and accommodation for various cargo types.

The airport's air cargo throughput has averaged four million pounds per year from 2015 to 2022, with import cargo comprising over 90% of the movements due to Bermuda's limited local production capacity. Currently, seven airlines, including Cargo Jet, British Airways, Delta, American, United, JetBlue, and Air Canada, provide cargo airlift services at the airport, with Cargo Jet and British Airways accounting for 85% of the total air cargo movements.

The renovation work for the Cargo Terminal is expected to be completed by fall 2023 and includes refurbishing the roof, refitting operational spaces for customs, constructing demising walls and roofed structures, and providing base building and fit-out services for storage and inspection rooms. The estimated cost of the renovation work is approximately USD 4.5 million, and the future operator will be responsible for additional investments in fit-out, furnishings, and equipment.

Entities interested in responding to the Expression of Interest (EOI) should demonstrate their ability to deliver the development, operation, and maintenance of the Cargo Terminal. The respondent's team can be a single firm or a joint venture capable of conducting business in Bermuda. The EOI submission should include an affirmative expression of interest, a description of the respondent's firm or entity and their relevant experience, familiarity with airport requirements and air cargo logistics, and confirmation of financial resources and capacity.

Skyport may host meetings with prequalified proponents before or at the start of the Request for Proposal (RFP) process. The timeline for the EOI and RFP process spans from June 1 to September 1, 2023, with the EOI submission deadline on June 14 and the RFP submission deadline on July 20. The contract negotiation phase will take place from July 31 to August 25. The concession term for the project is ten years, with the possibility of renewal for successive five-year periods.

Interested parties should contact Skyport to confirm their interest and qualifications to participate in the forthcoming RFP process. Interested parties should contact Skyport at the address below to confirm their interest and qualifications to participate in the forthcoming RFP process, please contact Ken Hassard at khassard@skyport.bm. #1194.OPS35

Quality standards organization Cargo iQ has formed a partnership with the International Federation of Freight Forwarders Associations (FIATA) and the Airport Services Association (ASA) to establish common standards and enhance quality practices in the air cargo supply chain. The alliance aims to foster collaboration among forwarders, ground handlers, and airlines on a global scale. FIATA and ASA representatives will attend Cargo iQ board meetings as observers to facilitate cooperation. The partnership seeks to optimize air cargo processes, improve operational efficiency, and represent the voice of freight forwarders in the pursuit of global standards. The collaboration will enable FIATA and ASA to gain insights into Cargo iQ's activities and quality improvement initiatives. By involving key stakeholders, the partnership aims to address the complexities of the cargo value chain and maintain

a seamless and high-performing cargo platform. Cargo iQ is actively encouraging national and regional airlines and handlers to join its community to promote standardized practices in the supply chain.

#1194.OPS36

Names

Aviation Facilities Company Management, LLC (AFCO) has promoted Eli Gregory to the position of Executive Vice President - Airport Investment & Development. In this role, Gregory will be responsible for expanding AFCO's portfolio through investments, acquisitions, and new developments. He will maintain relationships with airports and tenants, as well as establish new connections as AFCO continues to grow. AFCO's President & CEO, Chuck Stipancic, expressed confidence in Gregory's experience and abilities, emphasizing the importance of his role in AFCO's history. Gregory, who joined AFCO in 2019, currently serves as a Vice President at the company's headquarters in Dulles, Virginia. He looks forward to collaborating with AFCO's team to provide airport infrastructure solutions and growth opportunities in the U.S. and international markets. AFCO is a leading player in on-airport facility investment, development, financing, leasing, and management. The company has a strong track record and is backed by West Street Infrastructure Partners III, managed by Goldman Sachs Asset Management. #1194.OPS37

Sabine Trenk has been appointed as the new Chief Executive Officer (CEO) of Fraport USA, a subsidiary of Fraport AG that develops and manages airport retail and food & beverage concessions programs in the US. Trenk brings 30 years of industry experience, including managing commercial and airport operations in various continents. In her previous role as Chief Operating and Commercial Officer for Fraport Brasil, she led the implementation of concessions programs at Fortaleza and Porto Alegre airports. Trenk has also held executive positions at airports in China, Peru, Greece, and India. She succeeds Michael Mullaney as CEO of Fraport USA and aims to expand the company's footprint and services in the US market to enhance the travel experience. Fraport USA manages concessions programs at major airports in Baltimore/Washington, Nashville, Cleveland, New York-JFK Terminal 5, and Newark Terminal B. #1194.OPS38

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