



BizAv Industry

A glance to a sector not known enough

Folder 3

Rev. 2 11/02/2024

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Business Aviation

Definition

IBAC DEFINITIONS OF BUSINESS AVIATION



“That sector of aviation which concerns the operation or use of aircraft by companies for the carriage of passengers or goods as an aid to the conduct of their business, flown for purposes generally considered not for public hire and piloted by individuals having, at the minimum, a valid commercial pilot license with an instrument rating.”

SUB-DIVISIONS OF THE DEFINITION

From time to time, this definition for Business Aviation may not suit the specific requirements of a particular issue. Therefore, there are four sub-divisions for the segments that collectively make up business aviation.

Sub-division 1: Business Aviation – Commercial

The commercial operation or use of aircraft by companies for the carriage of passenger or goods as an aid to the conduct of their business and the availability of the aircraft for whole aircraft charter, flown by a professional pilot(s) employed to fly the aircraft.

Sub-Division 2: Business Aviation – Corporate

The non-commercial operation or use of aircraft by a company for the carriage of passengers or goods as an aid to the conduct of company business, flown by a professional pilot(s) employed to fly the aircraft.

Sub-Division 3: Business Aviation – Owner Operated

The non-commercial operation or use of aircraft by an individual for the carriage of passengers or goods as an aid to the conduct of his/her business.

Sub-Division 4: Business Aviation – Fractional Ownership

The operation or use of aircraft operated by an entity for a group of owners who jointly hold minimum shares of aircraft operated by the entity. Fractional Ownership operations are normally non-commercial; however, the operation of the aircraft may be undertaken as a commercial operation in accordance with the AOC held by the entity.



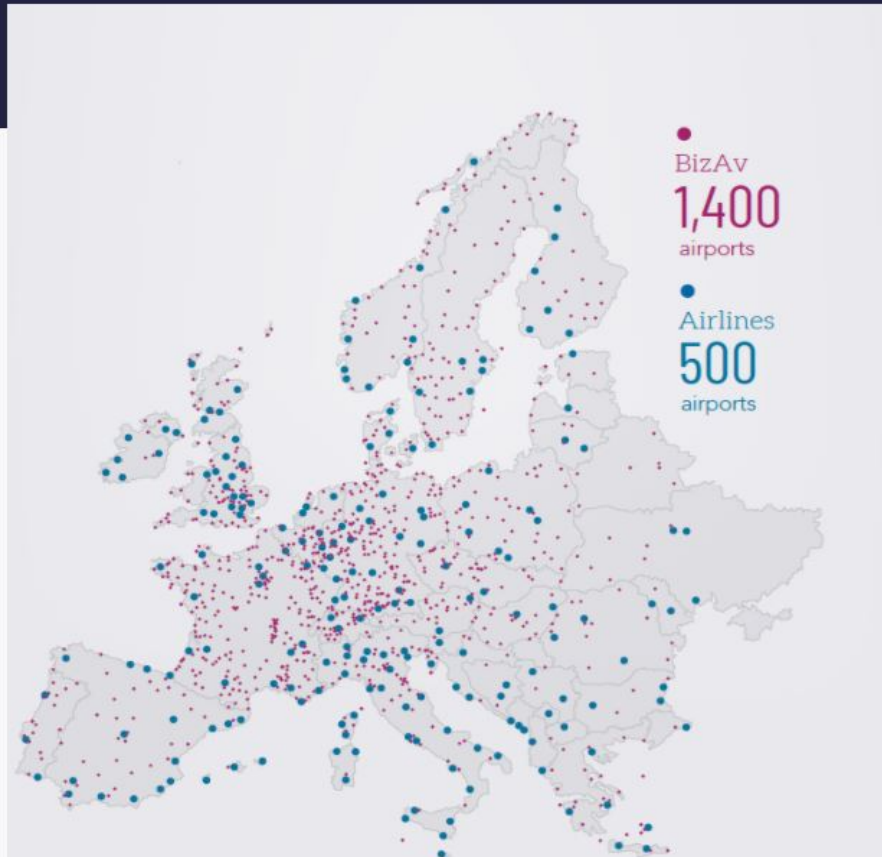
Business Aviation

Definition

What is Business aviation?

We all use many names: private jets, corporate aviation, air taxi and more recently, flying cars. One thing is for sure: Business aviation is flying smart.

Business aviation is a dynamic sector that fosters technical innovation and sustainability improvements across the full value chain, from manufacturers to operators. Business aviation is a lifeline for communities, be it for medical transport or as a tool to help governments and businesses generate local economic development.



We fly where others don't

Business aviation is a specialised travel solution enabling people to meet face-to-face when time matters most. It allows passengers to have full control over their schedule and travel to at least 3 x more destinations in Europe than scheduled airlines. In the process, Business aviation connects many small European communities and local airports, improving connectivity across Europe.

Business aviation also provides life-saving air transportation in times of public need, including fire and rescue and medical evacuation services. It represents an essential transportation link for communities without scheduled airline service.

BizAv Enables Economic Growth

BizAv Enables Business Efficiency

BizAv Enables Connectivity





BUSINESS AVIATION COMMITMENT ON CLIMATE CHANGE

Sustainability

The business aviation community has long been committed to reducing the environmental impact of its products and operations. Indeed, the fuel efficiency of BizAv products has been improved 40% over the past 40 years.

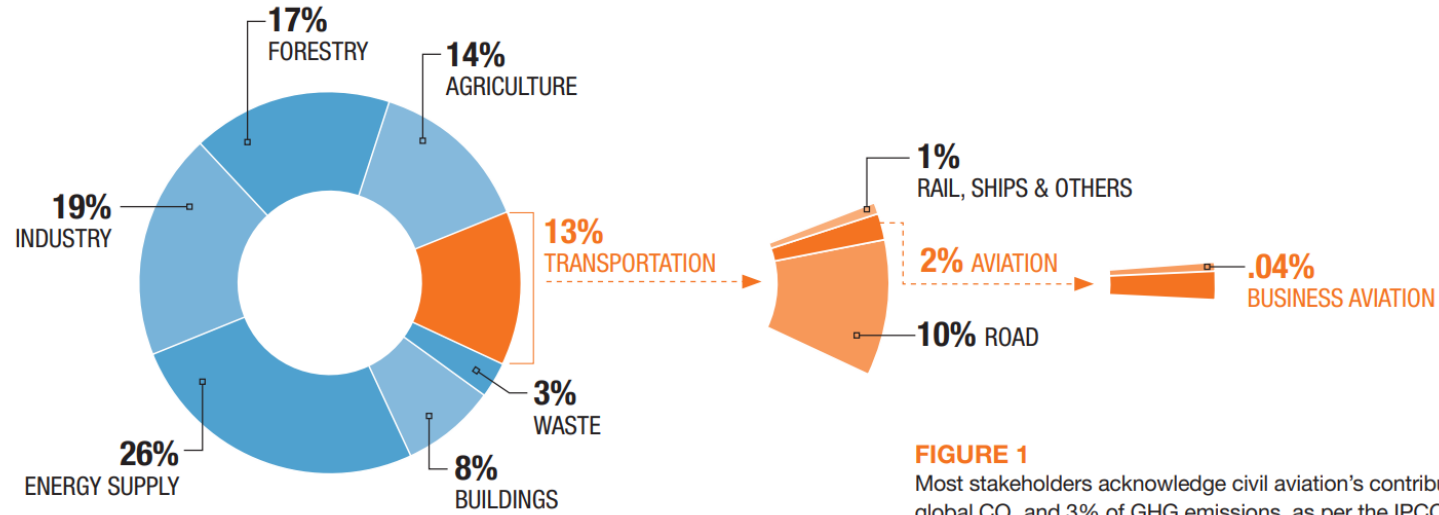
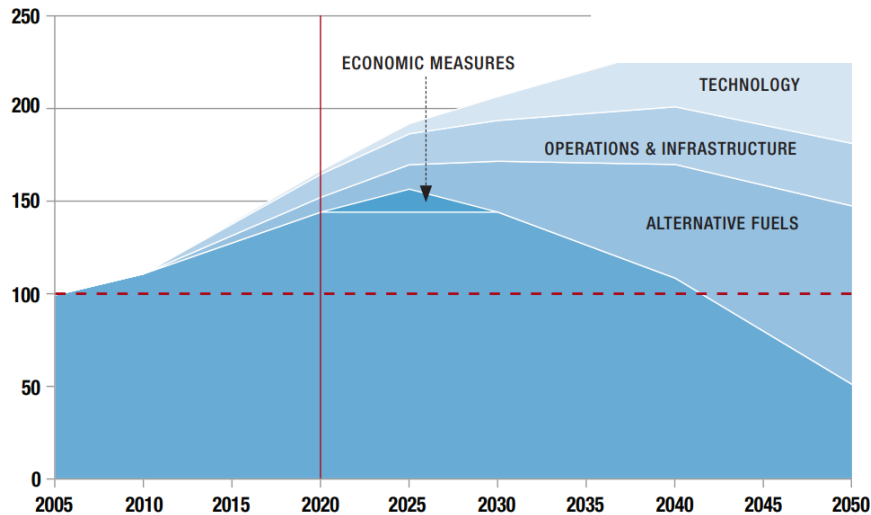


FIGURE 1

Most stakeholders acknowledge civil aviation's contribution of 2% of global CO₂ and 3% of GHG emissions, as per the IPCC report estimates. The business aviation contribution is estimated at 2% of aviation emissions or 0.04% of global emissions.

FIGURE 2

Business Aviation CO₂ Emissions Index 100 Equals 2005 Levels Actual and Forecast, 2005-2050



emissions reduction from four key areas: technology, infrastructure and operations, alternative fuels, and market-based measures. Carbon neutral growth is achieved by 2020. Business aviation carbon emissions then stabilize and are projected to decline through 2050, at which point they reach 50% below 2005 levels in absolute terms.

Although the community has an excellent environmental record, it is resolved to do more.

The Business aviation manufacturing and operating communities have jointly developed a programme in support of ICAO targets and are committed to contributing to the overall aviation goals called the Business Aviation Commitment on Climate Change (BACCC).

To this end, the business aviation community committed to the following specific objectives;

- 50% reduction in CO₂ emissions by 2050, relative to 2005;
- 2% fuel improvements per year between 2010 and 2020;
- And carbon-neutral growth by 2020.



Business Aviation

Facts & figures



2018

FACTS & FIGURES ABOUT EUROPEAN BUSINESS AVIATION

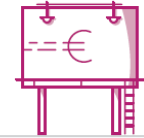


8%
of European traffic



374,000
direct and indirect jobs

€ 87 BILLION
economic output



+120,000

unique European city pairs a year
thanks to Business aviation



1,400

European airports connected
(of which 900 connected by business aviation only)

2,000

flights every day,
of which 90% within Europe



3,700 AIRCRAFT
based in Europe



127 MINUTES
Average time saved per trip

70 MEDICAL FLIGHTS
per day



CLIMATE CHANGE
COMMITMENT:

-50%

reduction in total CO₂
emissions by 2050
relative to 2005

2%

improvement in fuel
efficiency per year between
2010 and 2020

**CARBON
NEUTRAL**

growth by 2020

WHY DOES EUROPE NEED BUSINESS AVIATION?

7



Business Aviation

Europe (UK included)

Key National Figures



672,2 M inhabitants



5,000 km²



GDP/Inhabitant (PPS): 100
EU Index - base 100

Key Business Aviation figures (2022)



449,000

Jobs (direct & indirect)



1,589,611

Departures & arrivals (movements)



12.9 %

Growth (over 2021)



81,159

Unique airport pairs
(73216 in 2019 / +11 %)



4,056

Based aircraft
(4141 in 2019 / -85)



99,9 billions €

Business aviation economic output



NA

Rank



9.0 %

Business aviation market share
(13.0 % in 2019)



1,496

Airports with traffic
(1444 in 2019 / +52)



3,343

Registered aircraft
(3245 in 2019 / 0)



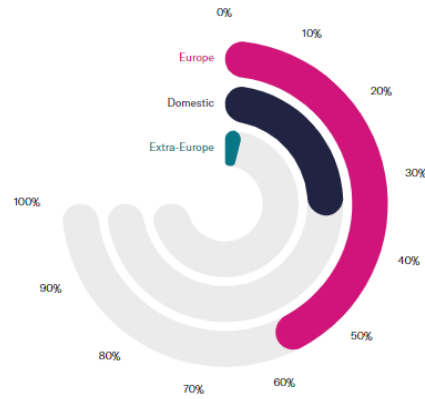
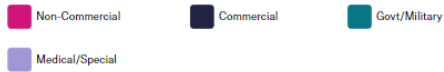
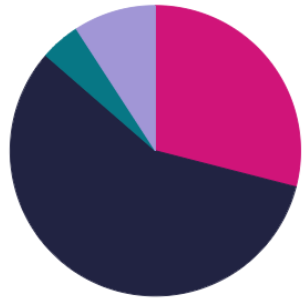
Business Aviation

Europe (UK included)

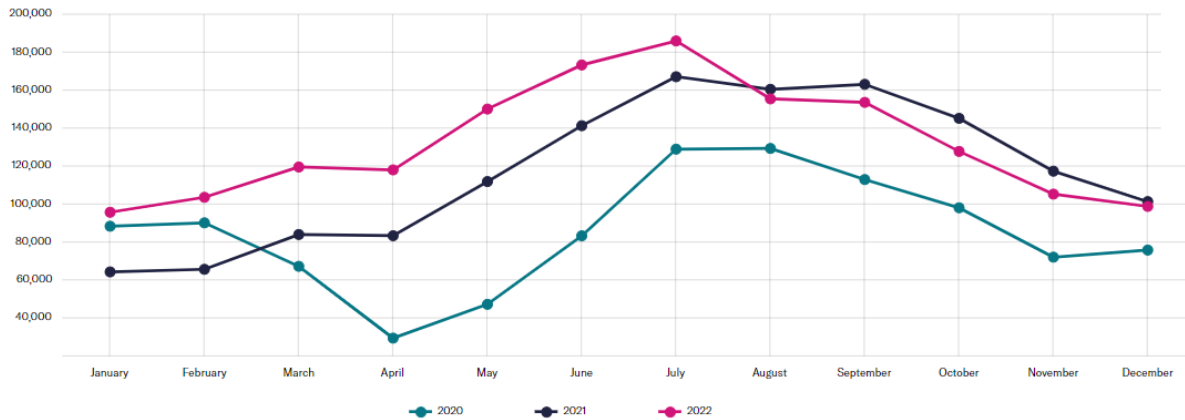
EUROPE Business Aviation Traffic Figures

Activity Type

Origin/Destination Type



Monthly Business Aviation Traffic - Movements



EUROPE Intercontinental connections

Intercontinental connections	Movements 2022 - both ways (growth over 2019)
Europe	1,498,784 (+11 %)
North America	27,577 (+73 %)
Africa	25,432 (+106 %)
Middle East	17,459 (+18 %)
Russia - Central Asia	13,825 (-77 %)
Central-South America	3,765 (+53 %)
South East Asia	2,768 (+103 %)

Top Countries	Movements 2022 - both ways (growth over 2019)
France	258,222 (+36 %)
United Kingdom	206,151 (+9 %)
Germany	187,496 (+17 %)
Italy	150,789 (+8 %)
Spain	107,765 (+16 %)
Switzerland	100,058 (+12 %)
Austria	43,927 (+10 %)
Norway	42,487 (+13 %)
Turkey	42,010 (+10 %)
Sweden	41,392 (+17 %)

Reset Filter

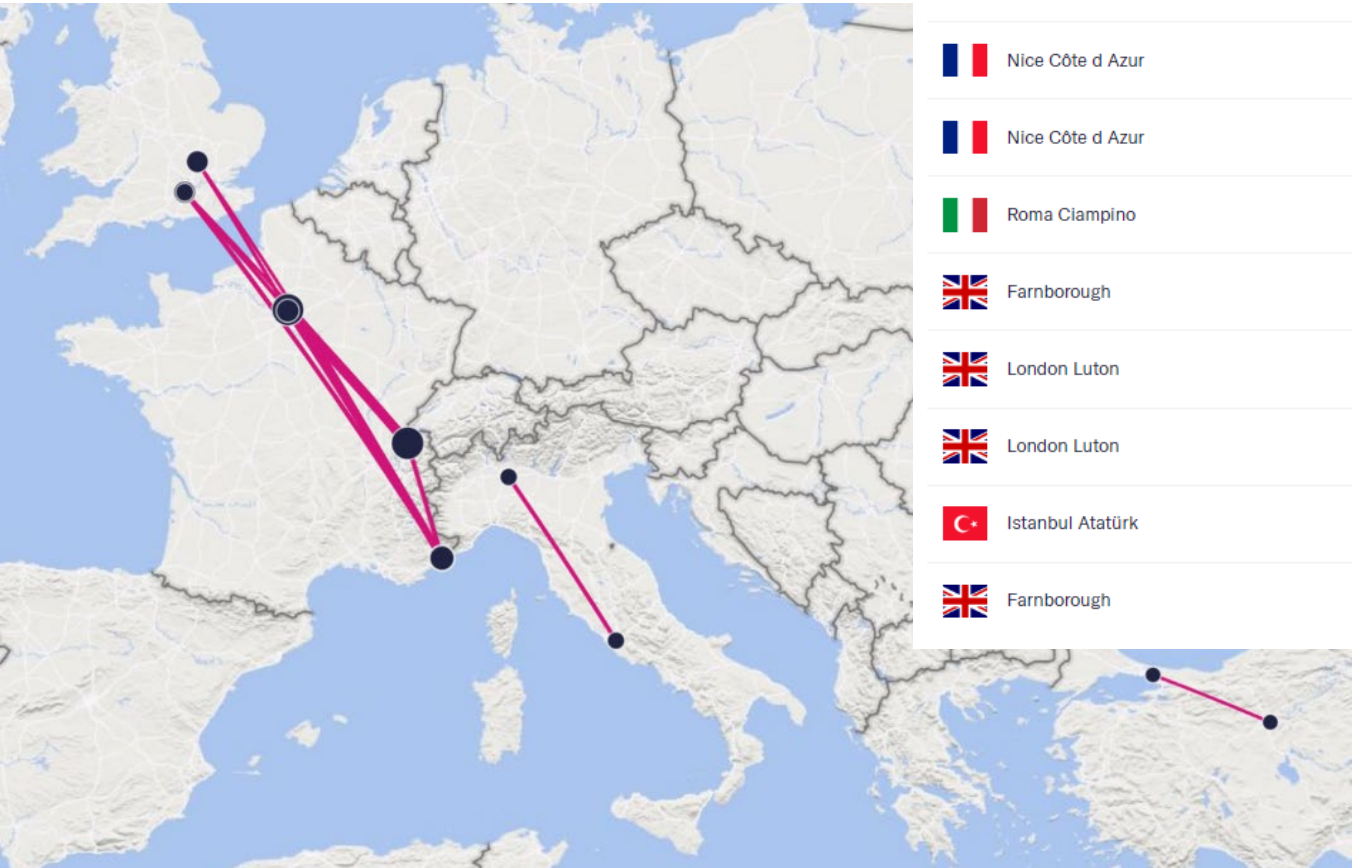




BizAv Europe Traffic (UK included)

Top 10 airports pairs 2022

EUROPE Top 10 airports pairs - Flights 2022 - both ways (growth over 2019)



Paris Le Bourget	Geneva International	3,632 (+12 %)
Paris Le Bourget	Nice Côte d'Azur	2,800 (+8 %)
Nice Côte d'Azur	Farnborough	1,848 (+38 %)
Nice Côte d'Azur	Geneva International	1,783 (+6 %)
Roma Ciampino	Milano Linate	1,702 (-7 %)
Farnborough	Paris Le Bourget	1,648 (+22 %)
London Luton	Paris Le Bourget	1,533 (+57 %)
London Luton	Nice Côte d'Azur	1,392 (+39 %)
Istanbul Atatürk	Ankara Esenboğa	1,343 (+3 %)
Farnborough	Geneva International	1,326 (+34 %)



BizAv Aircraft in Europe (UK included)

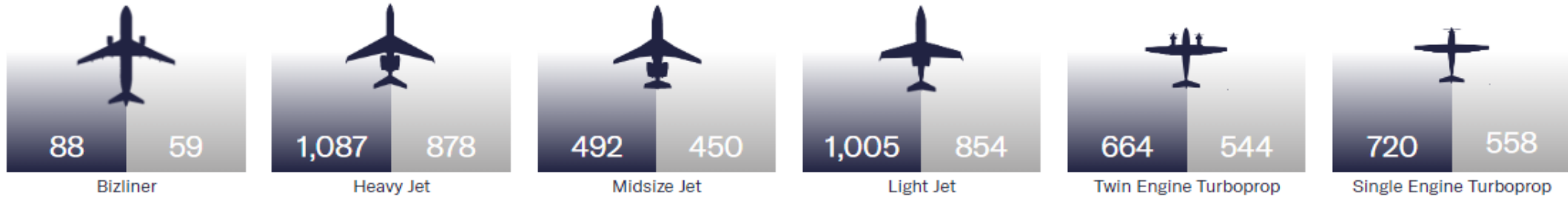
Based and Registered



EUROPE Business Aviation Fleet figures

4,056 Based aircraft

- 3,343 Registered aircraft



Top active aircraft (2022)	Segment	Departures	Arrivals	Totals
Cessna Citation Excel / XLS	Light Jet	59,540	59,521	119,061 (+11 %)
Pilatus PC-12	Turboprop	58,467	58,470	116,937 (+21 %)
King Air 200	Turboprop	50,974	50,982	101,956 (-4 %)
Embraer Phenom 300	Light Jet	39,743	39,752	79,495 (+23 %)
Cessna Citation CJ2	Light Jet	27,588	27,586	55,174 (+2 %)



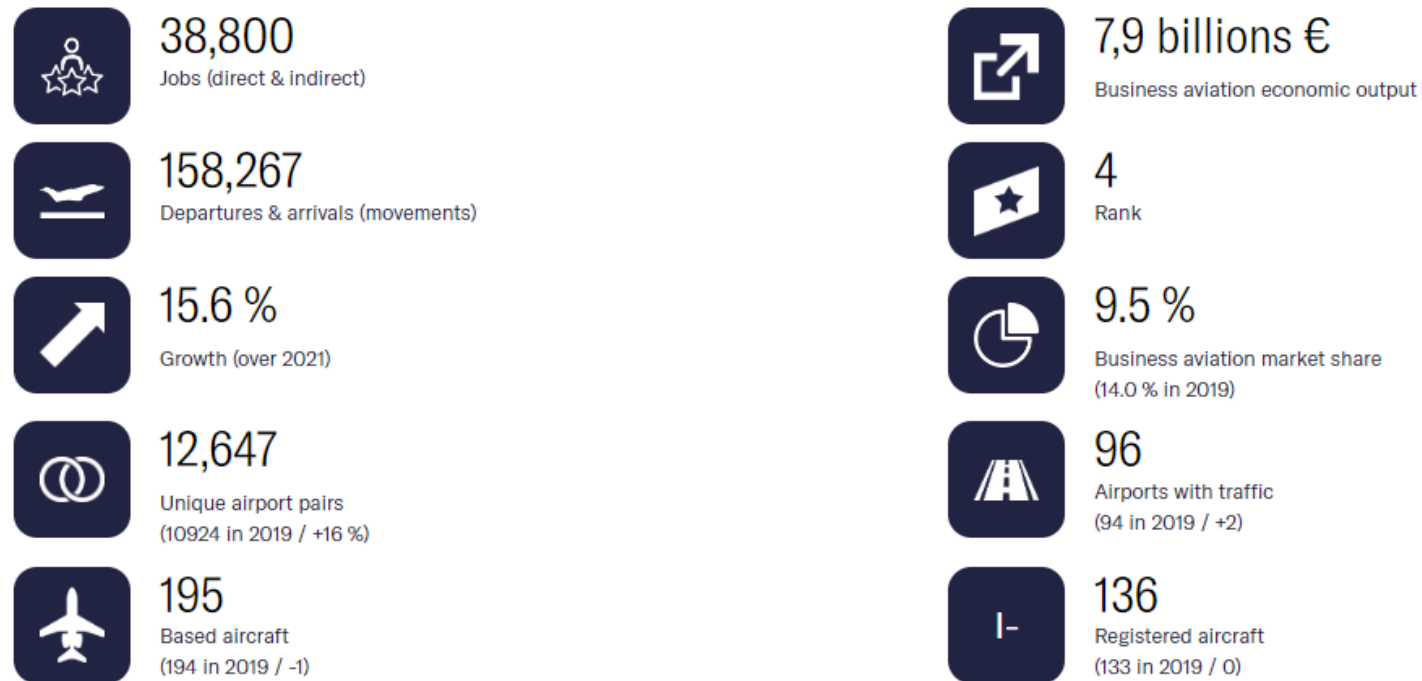
Business Aviation

Italy

Key National Figures



Key Business Aviation figures (2022)



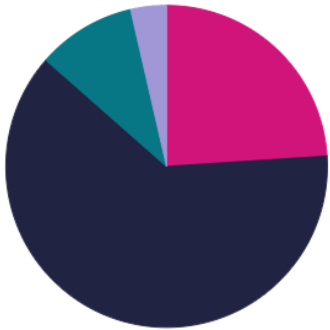


Business Aviation

Italy

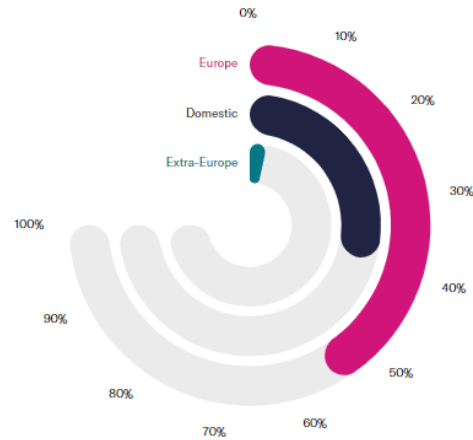
ITALY Business Aviation Traffic Figures

Activity Type

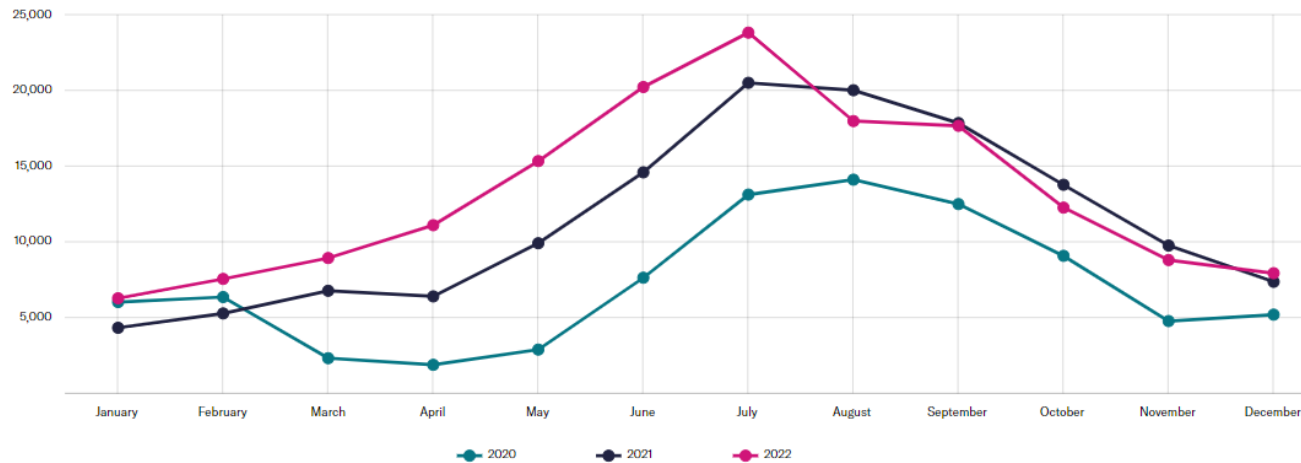


■ Non-Commercial
■ Commercial
■ Govt/Military
■ Medical/Special

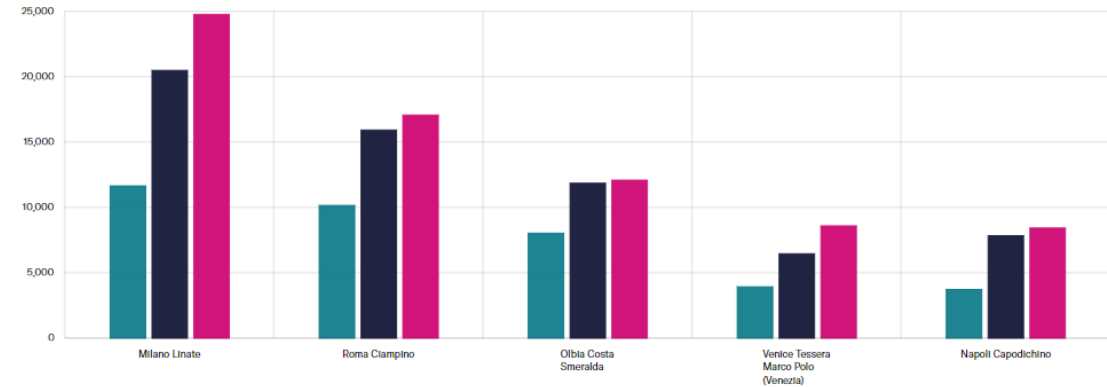
Origin/Destination Type



Monthly Business Aviation Traffic - Movements



Top Airports



ITALY Intercontinental connections

Intercontinental connections	Movements 2022 - both ways (growth over 2019)	Top Countries	Movements 2022 - both ways (growth over 2019)
Europe	151,326 (+9%)	Italy	62,522 (+21%)
North America	2,708 (+85%)	France	19,535 (+64%)
Africa	1,876 (+28%)	United Kingdom	11,259 (+15%)
Middle East	1,212 (+19%)	Switzerland	10,897 (+16%)
Russia - Central Asia	666 (-92%)	Germany	10,208 (+17%)
Central-South America	276 (+424%)	Spain	7,441 (+16%)
South East Asia	203 (+573%)	Austria	3,998 (+9%)
		Greece	3,281 (+9%)
		United States	2,493 (+49%)
		Croatia	2,150 (+13%)

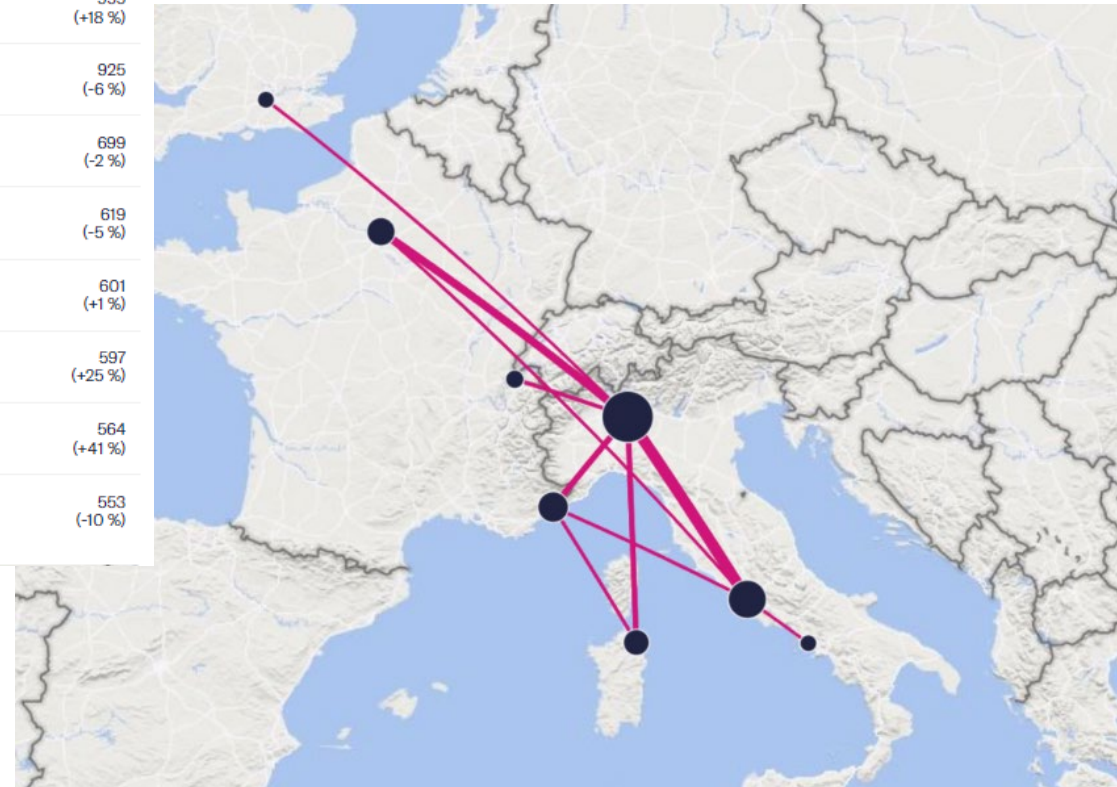


Business Aviation

Italy

ITALY Top 10 airports pairs - Flights 2022 - both ways (growth over 2019)

Roma Ciampino	Milano Linate	1,702 (-7 %)
Milano Linate	Paris Le Bourget	1,266 (+27 %)
Milano Linate	Nice Côte d Azur	995 (+18 %)
Olbia Costa Smeralda	Milano Linate	925 (-6 %)
Milano Linate	Geneva International	699 (-2 %)
Olbia Costa Smeralda	Nice Côte d Azur	619 (-5 %)
Roma Ciampino	Nice Côte d Azur	601 (+1 %)
Roma Ciampino	Paris Le Bourget	597 (+25 %)
Milano Linate	Farnborough	564 (+41 %)
Napoli Capodichino	Roma Ciampino	553 (-10 %)





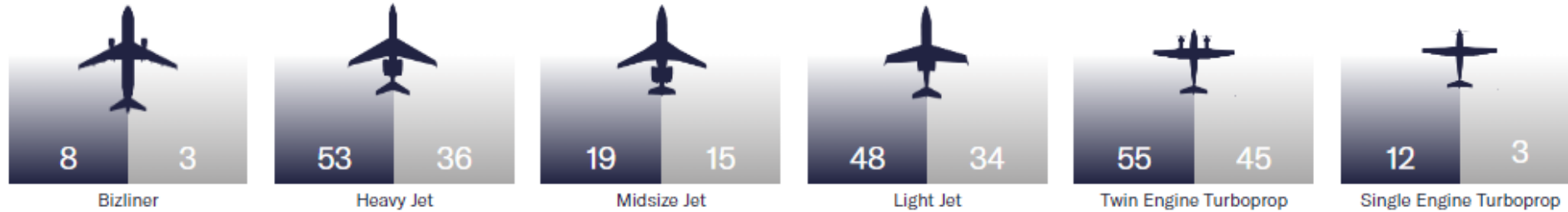
Business Aviation

Italy

ITALY Business Aviation Fleet figures

195 Based aircraft

136 Registered aircraft



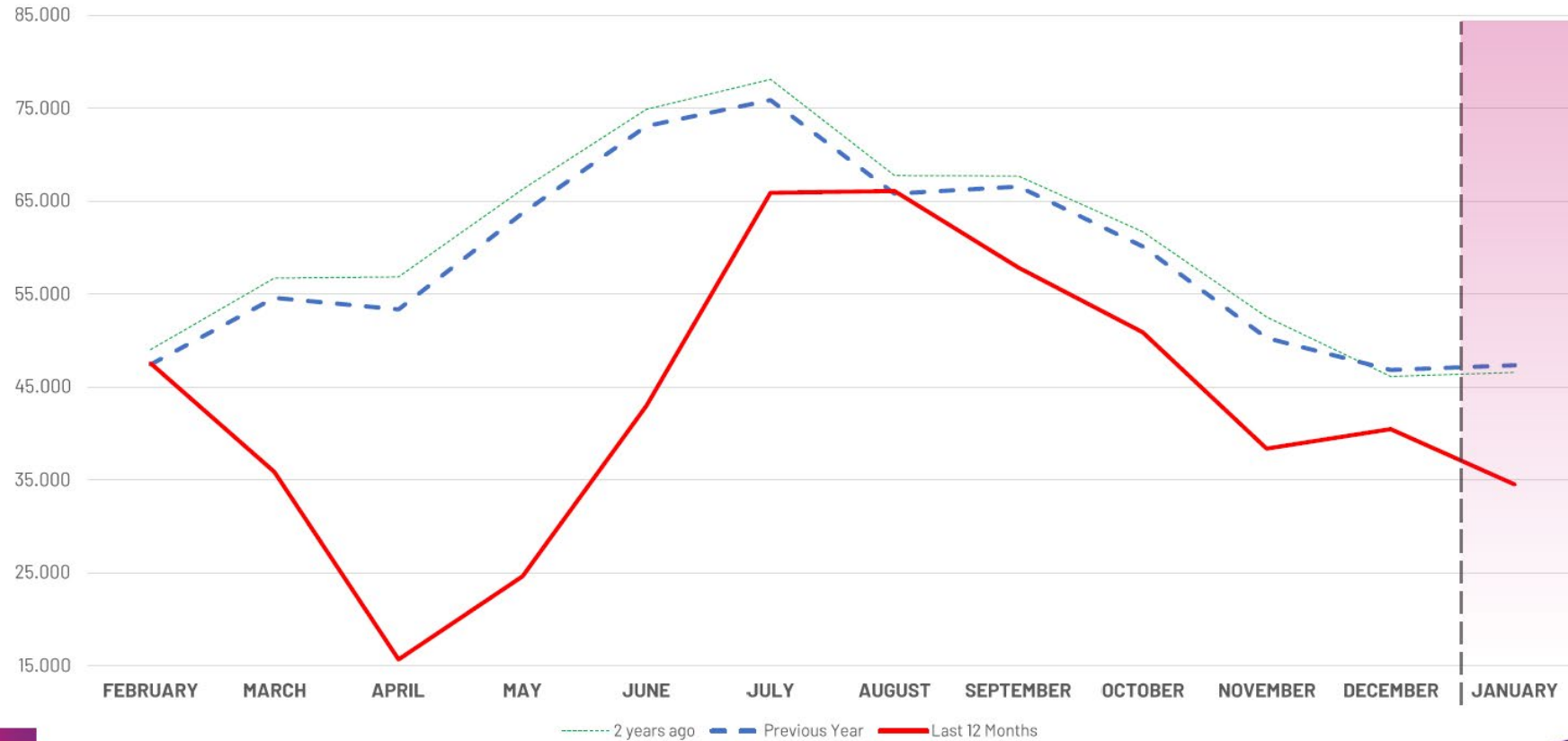
Top active aircraft (2022)	Segment	Departures	Arrivals	Totals
Piaggio P180 Avanti	Turboprop	6,220	6,225	12,445 (+10 %)
Cessna Citation Excel / XLS	Light Jet	5,501	5,485	10,986 (+15 %)
Pilatus PC-12	Turboprop	3,790	3,805	7,595 (+33 %)
Dassault Falcon 2000	Heavy Jet	3,636	3,642	7,278 (+21 %)
Embraer Phenom 300	Light Jet	3,378	3,380	6,758 (+21 %)



Business Aviation

Covid-19 Impact

DEPARTURES, ARRIVALS, INTERNALS AND OVERFLIGHTS (DAIO) REPORT BUSINESS AVIATION FLIGHTS



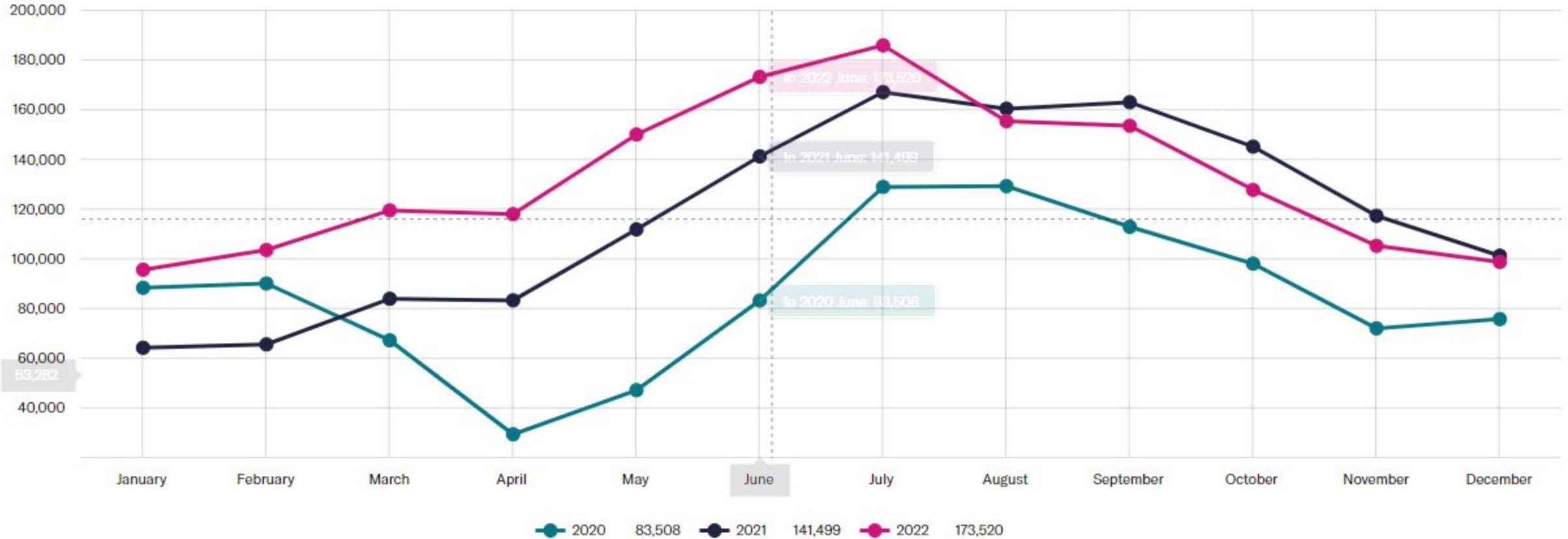
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Business Aviation

Monthly BizAv Traffic - Movements





Thank You