

# Quality of Network

Strong international connections are essential for an open and globally connected economy such as the Netherlands. In recent years, Schiphol has built a thriving network that links people and businesses with destinations and opportunities around the world.



One of Schiphol Group's priorities is always to maintain its superior network standard. As a central hub within our Group, Amsterdam Airport Schiphol plays a key role in providing the connectivity that is necessary to the Netherlands' thriving open economy. We are seeing a resurgence in flight frequencies, allowing us to maintain the breadth of our destinations and overall connectivity. Notably, in the 2023 Airport Industry Connectivity Report, Amsterdam Airport Schiphol continues to feature prominently in the 'direct connectivity ranking' of European airports, securing second place behind Istanbul, a slight shift from its previous top position.

2023 was a notable year for expanding our network. We welcomed four new airlines – PLAY, Freebird Europe, Air India and JetBlue – and expanded our network with seven new destinations. There were also minor reductions, with KLM ceasing flights to several destinations and the bankruptcy of FlyBe.

Despite challenges such as the planned flight movement cap, we are steadfast in our commitment to sustain a network of exceptional quality. We aim to find solutions that harmonise our network's integrity with environmental stewardship. This approach is essential to provide clarity and direction to our stakeholders and ensuring the long-term sustainability of our operations.

In our ongoing effort to maintain a high-quality network, we are equally committed to ensuring quality of service for our customers and quality of life for the communities around us, including our employees. Balancing these aspects is critical to our mission and forms the basis of our long-term strategy for a sustainable and responsible future in aviation.

**Top performance indicator** Quality of Network



## ➔ Network of destinations

In 2023, the network of destinations served by Amsterdam Airport Schiphol shrunk in comparison to last year from 313 to 305. This was mainly caused by the fact that a number of cargo-only routes that were flown in 2022 did not return in 2023. The total number of 'pre-COVID' destinations in 2019 was 332.

Despite its decrease in destinations, Schiphol remained a leading airport in terms of connectivity in 2023. According to the ACI Airport Industry Connectivity Report 2023, Amsterdam ranked second for direct connectivity (first in 2022) and fourth for hub connectivity. A further report by travel data provider OAG mentioned that, in 2023, Amsterdam Airport Schiphol was the number 3 megahub behind London Heathrow and JFK International Airport. Both reports suggest that Schiphol's position as a major aviation hub is under pressure by the Dutch government's capacity reduction plans.

**Direct connectivity**

Ranking of top-10 European airports (ACI Airport Industry Connectivity Report)

Rank 2023	Airport	Rank 2022	Rank 2019
1	Istanbul IST	2	5
2	Amsterdam Airport Schiphol AMS	1	2
3	London Heathrow LHR	3	4
4	Frankfurt FRA	4	1
5	Paris CDG	5	3
6	Madrid MAD	6	7
7	Barcelona BCN	8	8
8	Munich MUC	7	6
9	Rome FCO	11	9
10	Londen Gatwick LGW	9	10

**Hub connectivity**

Ranking of top-10 airports worldwide (ACI Airport Industry Connectivity Report)

Rank 2023	Airport	Rank 2022	Rank 2019
1	Frankfurt FRA	1	1
2	Istanbul IST	3	6
3	Dallas Fort Worth DFW	2	2
4	Amsterdam Airport Schiphol AMS	4	3
5	Denver DEN	5	7
6	Paris CDG	6	4
7	Atlanta ATL	7	5
8	London Heathrow LHR	10	10
9	Newark Liberty EWR	8	13
10	Hamad DOH	13	17

**Network developments**

In 2023, four new airlines were welcomed to Amsterdam Airport Schiphol. PLAY returned in June with flights from Reykjavik, Freebird Europe with flights from Dubrovnik, Air India returned after 23 years with flights from New Delhi and JetBlue began serving Amsterdam for the first time, with flights from New York and Boston.

In total, seven new destinations were added to our network. China Southern Airlines introduced flights from Shenzhen to Amsterdam for a period of six weeks, replacing it with flights from Beijing Daxing. KLM reintroduced flights to Beijing Capital after Chinese COVID-19 restrictions were lifted. In addition, easyJet launched services from Jersey, and London Southend and Corendon Dutch Airlines introduced flights from Gazipasa in Turkey. In December 2023, Transavia launched services to Tromsø, Norway. In addition to these new destinations for Schiphol, various airlines launched new routes, including Montréal by Air Canada, Curaçao by Corendon Dutch Airlines, Salzburg (Austria) by Eurowings and Rovaniemi (Finland) by easyJet.



Even though the number of destinations decreased in 2023, Schiphol continued to be a leading airport in terms of connectivity.

Unfortunately, several destinations were also cut from Schiphol's network in 2023. KLM ceased flying to Katowice in Poland, Aarhus in Denmark, Muscat in Oman and Bridgetown in Barbados. China Southern Airlines has stopped flights from Shenzhen after only six weeks. With the bankruptcy of FlyBe, we also lost East Midlands (UK) as a destination; FlyBe flew four routes from Amsterdam.

**Traffic and transport in 2023**

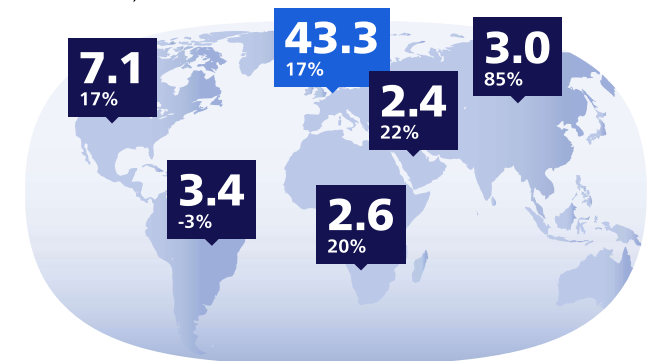
**Passengers**

The recovery of passenger numbers in the first months of 2023 was not possible as the measure to limit the number of local departing passengers was extended until the end of the winter season (25 March 2023). To ensure that operations during the first weeks of the summer season, including the May holidays, would be able to cope with the increasing number of passengers, several measures were taken to limit the number of local departing passengers in the morning hours. After mid-May, there were no more restrictions.

By mid-May, it was possible for all airlines to operate up to the maximum capacity of Amsterdam Airport Schiphol.

**Passenger volumes by continent in 2023**

Passenger volume at Schiphol in millions (change versus 2022; excluding transit direct)



### Air transport movements at Schiphol in 2023

Movements per airline		Change
KLM	228,956	14.1%
easyJet	35,482	10.5%
Transavia	30,567	7.7%
Delta Air Lines	11,259	15.3%
Vueling	10,393	10.1%
British Airways	10,043	38.6%
TUI fly	8,264	3.4%
Lufthansa	7,191	16.9%
Air France	5,764	-18.0%
SAS	5,585	16.1%
Other airlines	88,465	17.3%

### Top-10 European passenger volumes and market share in 2023

in millions, excluding transit	Change	Market share
London LHR	79.2	13.8%
Istanbul IST	75.9	13.3%
Paris CDG	67.4	11.8%
Amsterdam AMS	61.9	10.8%
Madrid MAD	60.2	10.5%
Frankfurt FRA	59.3	10.4%
Barcelona BCN	49.8	8.7%
London LGW	40.9	7.2%
Rome FCO	40.3	7.1%
Munich MUC	37.0	6.5%

### Cargo

The total volume of freight in tonnes fell by 4.2% YTD (first half -5.9%) in 2023 compared with the same period in 2022. There are two main reasons for this.

First, it is largely related to the shortage of slots. Freighters prefer to operate on Schiphol routes, but there are no slots available and ad hoc slots have decreased compared to the first quarter of 2022 in particular. The number of freighters (ATM) has decreased by 12.9% (half-year figures -8.4%), which explains a significant part of the tonnage loss. In Q1 2022, there were significantly fewer flights due to COVID-19 and freighters had the opportunity to make ad hoc flights to Schiphol Airport.

Another reason is the decline in demand for air freight, which is an important global economic indicator. Looking at the year to date (June 2023), total freight volumes to and from Europe, there is a decrease of 10%. Globally, freight volumes are performing poorly. Schiphol is also experiencing this, but to a lesser extent; relatively speaking, Schiphol is performing well in comparison to our European counterparts.



The new cargo strategy for Schiphol Cargo, focusing on more high-quality and high-value cargo, will be implemented in 2024.

Although the total volume of freight has decreased, freighters at Schiphol Airport have a higher load factor (+6%) in 2023 than in 2022. In addition, there was 2.1% more cargo in the belly of passenger flights.

It is expected that if the number of slots at Schiphol shrinks, the volume of cargo will fall more than the number of passengers (cargo slots are exchanged for passenger slots). Schiphol therefore wants to protect the number of slots for cargo aircraft (2.4% of the total).

In 2023 we decided to draw up a new cargo strategy for Schiphol Cargo, focusing on more high-quality and high-value cargo. We aim to complete this new strategy in the first half of 2024. One of the main focuses will be to improve landside accessibility for visiting trucks and to reduce congestion. We will continue to work with the Dutch air cargo community and invest heavily in our new Port Community System to make it state of the art, as we aim to become an efficient multimodal hub for European cargo, focusing on quality rather than quantity. In addition, we will continue to work on the new online information portal Secure Import, which aims to enhance cargo security in and around the hub.

### Cargo volumes by continent in 2023

Schiphol cargo x 1,000 tonnes (change versus 2022)



Schiphol is developing a fully automated cargo centre, dnata Cargo City Amsterdam, which will have an annual handling capacity of 850,000 tonnes by the second half of 2024. This will strengthen the existing warehousing facilities at the airport, which also offers well-connected belly and full-freighter networks.

**Top-10 European cargo volumes and market share in 2023**

x 1,000 tonnes of cargo		Change	Market share
Frankfurt FRA	1,828	95.0%	14.5%
Paris CDG	1,815	98.2%	14.4%
Istanbul IST	1,516	106.3%	12.0%
Leipzig LEJ	1,393	92.3%	11.0%
London LHR	1,387	102.7%	11.0%
Amsterdam AMS	1,378	95.8%	10.9%
Liege LGG	1,006	88.2%	8.0%
Cologne CGN	859	89.6%	6.8%
Luxembourg LUX	795	82.0%	6.3%
Milan MXP	666	93.0%	5.3%

**Airlines continue to increase the use of quietest aircraft in 2023**

The share of latest-generation aircraft at Amsterdam has grown strongly in recent years. In 2019 the share of latest-generation aircraft was only 6.0% at Amsterdam. This increased to 19.5% in 2023. Examples of latest-generation aircraft are the Airbus A220, Airbus A320neo, Airbus A321neo, Boeing 737MAX, Airbus A350, Boeing 787 Dreamliner, Boeing 747-8 Freighter and Embraer ERJ-195-E2. This shift towards newer, quieter aircraft models aligns very well with Schiphol Airport's 'Quieter, Cleaner, Better' policy, highlighting its commitment to reducing environmental impact and enhancing the quality of life for nearby communities.

In 2023, several airlines operated quieter aircraft, including three newcomers in 2023; Air India with the B787-8, PLAY with the Airbus A320neo and JetBlue with the Airbus A321neo. Other airlines adding Chapter 14 aircraft included Aegean Airlines, Air Astana, Air Transat, Air Malta, easyJet, Egypt Air, ITA, SAS and Swiss. Transavia took delivery of its first A321neo in December,

with many more to follow. Corendon Dutch Airlines took delivery of their B737 MAX9 in September, with two more to follow.

**Airlines concerned about capacity at Schiphol**

A major issue for the aviation industry in 2023 was the Dutch government's planned reduction of the maximum number of annual flight movements at Schiphol. With a reduction in aircraft movements it is expected this will have a negative impact on the number of destinations served from Amsterdam.

**➔ Accessibility**

The recovery in passenger numbers that began post-COVID-19 in 2021 continued in 2022 and in 2023. In 2023, passenger numbers came close during the peak summer and autumn break periods of 2019, which created challenges in accommodating the increased traffic flows at the curbside drop-off zone. As 2023 progressed the modal split became more balanced again, resembling 2019.

**Smart and clean mobility**

Amsterdam Airport Schiphol is continuously improving and modernising its landside infrastructure. These steps will help ensure Schiphol's capacity once passenger numbers return to normal levels. We are preparing for the future with our Landside Central Programme (LCP) to ensure that our airport remains accessible for all modes of transport. The programme was launched in 2020 to help coordinate and integrate the development of access road projects at Schiphol Centre. We are exploring ways to further improve the landside infrastructure to keep Schiphol Centre accessible and landside safe in the coming years, taking into account long-term trends and developments.

In 2023 we further developed Schiphol GO, a smart mobility app that allows Schiphol employees to choose and register their own modes of transport to and from work and for business trips. The app includes a 'work-at-home allowance' and a 'cycling mileage allowance' of 30 cents per kilometres for cycling. This is a strong incentive for employees to cycle to work or to the nearest public transport station. Each trip generates a carbon footprint report to

heighten employees' awareness of their transport behaviour and the impact it has on sustainability.

The airport aims to be an attractive, vibrant and easily accessible hub. The Most Sustainable Airports 2030 roadmap shapes the transition to smart and clean mobility, with the aim of maintaining the vibrancy and accessibility of the growing airport. Reducing the use of fossil fuels and promoting clean transport is key. Our bicycle policy aims to create a culture using a bicycle is natural, given its smart, clean and fast characteristics. We want to improve the use of bicycles, parking facilities, cycling culture and appreciation of cycling facilities throughout the Schiphol area with the aim of reducing our Scope 3 emissions.



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Looking to the future, Schiphol will introduce zero-emission zones at Schiphol Centre from 2026, where only trucks and vans that do not produce harmful emissions will have access to the 'logistics roads' around the terminal. This important step aims to reduce nitrogen and carbon emissions and improve air quality in the logistics basements.

### Improving access by public transport

To achieve our sustainability ambitions and further develop multimodality, Schiphol promotes the increased use of rail and other public transport during journeys to and from our airport.

We are in favour of high-speed rail as a long-term substitute for short-haul flights. To underline this, in 2022 Schiphol facilitated an air-rail pilot by KLM and Thalys, which gave us a unique insight into passenger expectations and experiences. Together with air-rail partners, we will further evaluate the pilot and continue to improve the air-rail journey, in line with the air-rail action agenda as presented to Dutch parliament in 2020. Air-rail is also part of the TULIPS research and development programme to make the airport more sustainable.

At Schiphol Plaza, work has also started on improving access from the train platforms by renovating the staircases and lifts. At the same time, major steps have been taken to improve the overall wayfinding in the Plaza area.



At Schiphol Plaza the project has started to enhance the capacity to and from the platforms by renewing staircases and elevators.

### Continued efforts in North/South metro line

The North/South metro line will ensure that Schiphol Airport remains accessible by public transport in the long term. The expected demand for public transport passengers in the Amsterdam metropolitan region is expected to exceed the capacity of Schiphol station.

In 2023, Schiphol not only continued but also formalised its collaboration. Concurrently, the Dutch government has proposed funding for the exploration phase. In line with this, the OVAH (OV-verbinding Amsterdam-Haarlemmermeer) project organisation – which is part of the MIRT (Meerjarenprogramma Infrastructuur, Ruimte en Transport) – initiated the tender process in September 2023, aiming to engage consultants for assistance in this phase. The consortium, comprising both governmental bodies and private organisations, anticipates selecting a preferred alternative by the end of 2025.

The extension of the North/South line will promote sustainable regional, national and international connectivity. It will free up space in the Schiphol tunnel, which can then be used by both national and international trains. The latter is important so that the train can serve as an alternative to air travel for short distances. It will also strengthen Schiphol Airport as a multimodal hub, bringing together public transport, cars and planes.

### Parking operations

While we encourage visitors to Schiphol to use public transport whenever possible, ensuring good parking facilities and capacity remains essential for our accessibility. We actively monitor mobility trends and developments to ensure that we can meet long-term demand. We have started the construction of a new car rental service centre at Schiphol. The car rental service centre can accommodate approximately 2,500 vehicles. The five largest car rental companies at Schiphol will come together under one roof, which will be covered by 17,000 m<sup>2</sup> of solar panels. With this facility, Schiphol is encouraging car rental companies to switch to electric vehicles. In addition to our regular long-term maintenance activities, we have completely renovated our staff car park P30 with 3,300 parking spaces.