

Moral Report 2023

Action Plan 2024

Who are we?

- Largest and oldest airline association in France
- 100% dedicated to airline business
- 55 carriers representing 111 airline brands
- Part of a worldwide B.A.R. network

2023 in a nutshell

- Air Traffic
 - Close to 170 million passengers
 - -5.5% compared to 2019 figures
- Weak Areas
 - French domestic -20.6%
 - Asia -21.9% (China -65.2%)
- Strong Growth
 - Africa +13.1%, mainly North Africa
- Main airports traffic
 - CDG -11.5%
 - ORY +1.4%
 - NCE -2.1%
 - MRS +6.8%
 - BVA +41.3%
- Total Movements
 - 3,133,200, -4.3% vs 2019

2023 in a nutshell

- Annual average fare increase: +8.6% in 2023
- Fluctuations: Strong in the first half, more moderate in the second half
- Departing from France Mainland: +7.9%, driven by domestic (+13.6%) and international (+6.9%) networks
- Medium-Haul: Mixed changes, with increases from EEA & Switzerland and decreases to North Africa
- Long-Haul: Highest increases in the Middle East and Asia-Pacific, slower growth in North America

2023 in a nutshell

Role of BAR France in 2023

- Administrative Support: Day-to-day assistance for airlines
- Representation: Involved in professional commissions, slot coordination, and administrative commissions
- Cost reduction initiatives: Actively participated in economic consultative commissions for major airports
- Civil aviation budget: Engaged in reducing airport charges and advocating for financial well-being of members

Long-Term Action - Environment

- Proactive participation in environmental discussions
- Focus on noise perimeters, balanced approach, IGMP, and air pollution working groups

2024 Activity Plan

- Global Passenger Traffic Recovery
 - Expected to reach 9.4 billion passengers (102.5% of 2019)
- Commitment to sustainability, passenger safety, and enhancing travel experience
- Eurocontrol's projections: Strong increase in flights for France (100 - 105% vs 2019)
- Financial overviews
 - Participation in CoCoEco meetings
- Defense of carriers
 - In governance bodies like CAAC and ACNUSA
- Specific issues
 - 4-flight
 - Balanced approach at major airports
 - Olympics
 - ETIAS launch
 - Airport quality
 - New taxes implementation, etc.

2024 Activity Plan

- Commitment to supporting members through representation, financial advocacy and environmental stewardship
- Anticipates a strong recovery but acknowledges challenges, particularly in the environmental area
- Dedicated to ensuring the resilience and sustainability of the aviation sector
- Our strength is you