



DAVID CICEO CEO | Cluj International Airport

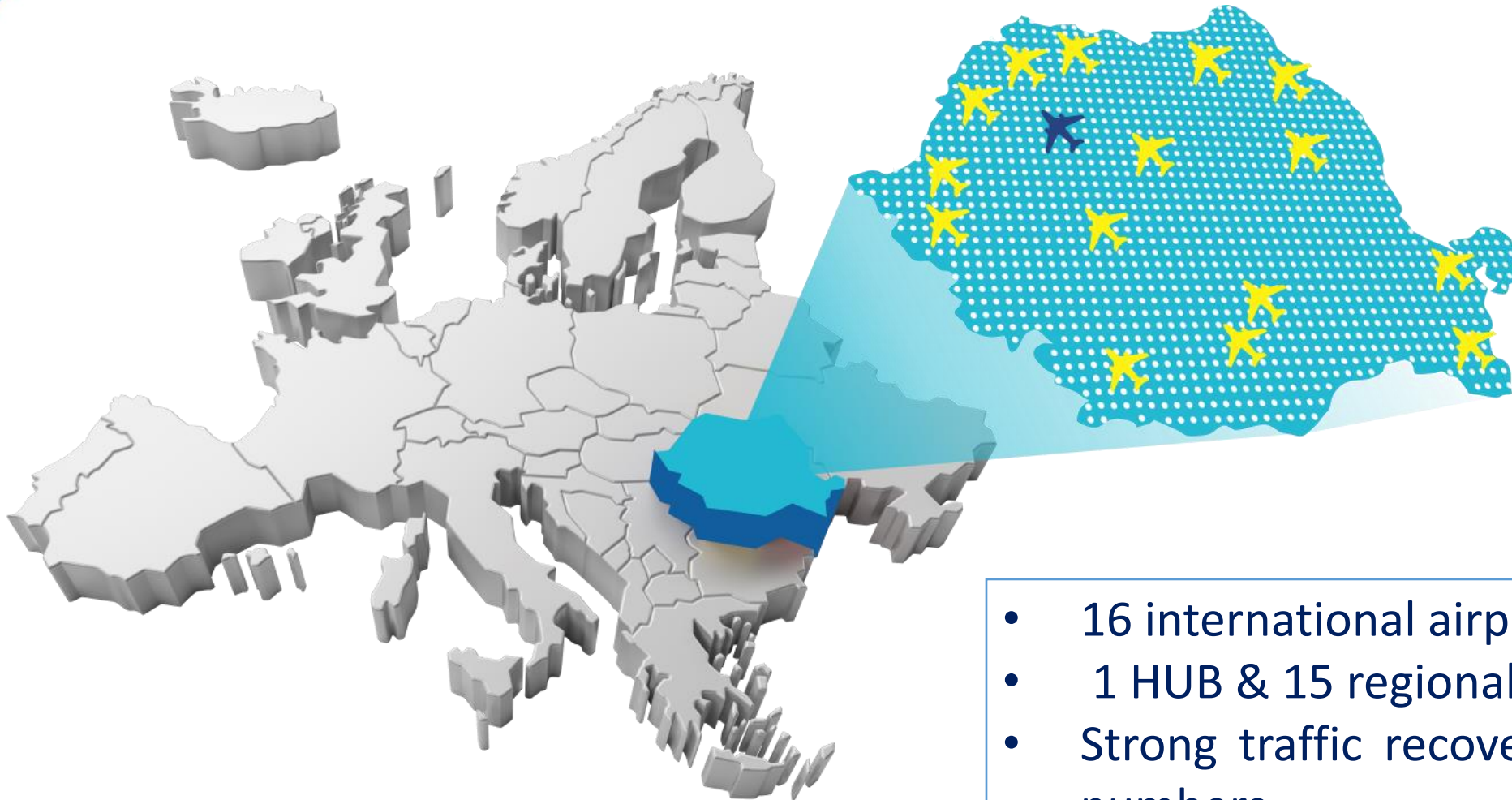
Romanian Air Transport Market & Cluj International Airport Case study



9 September 2022

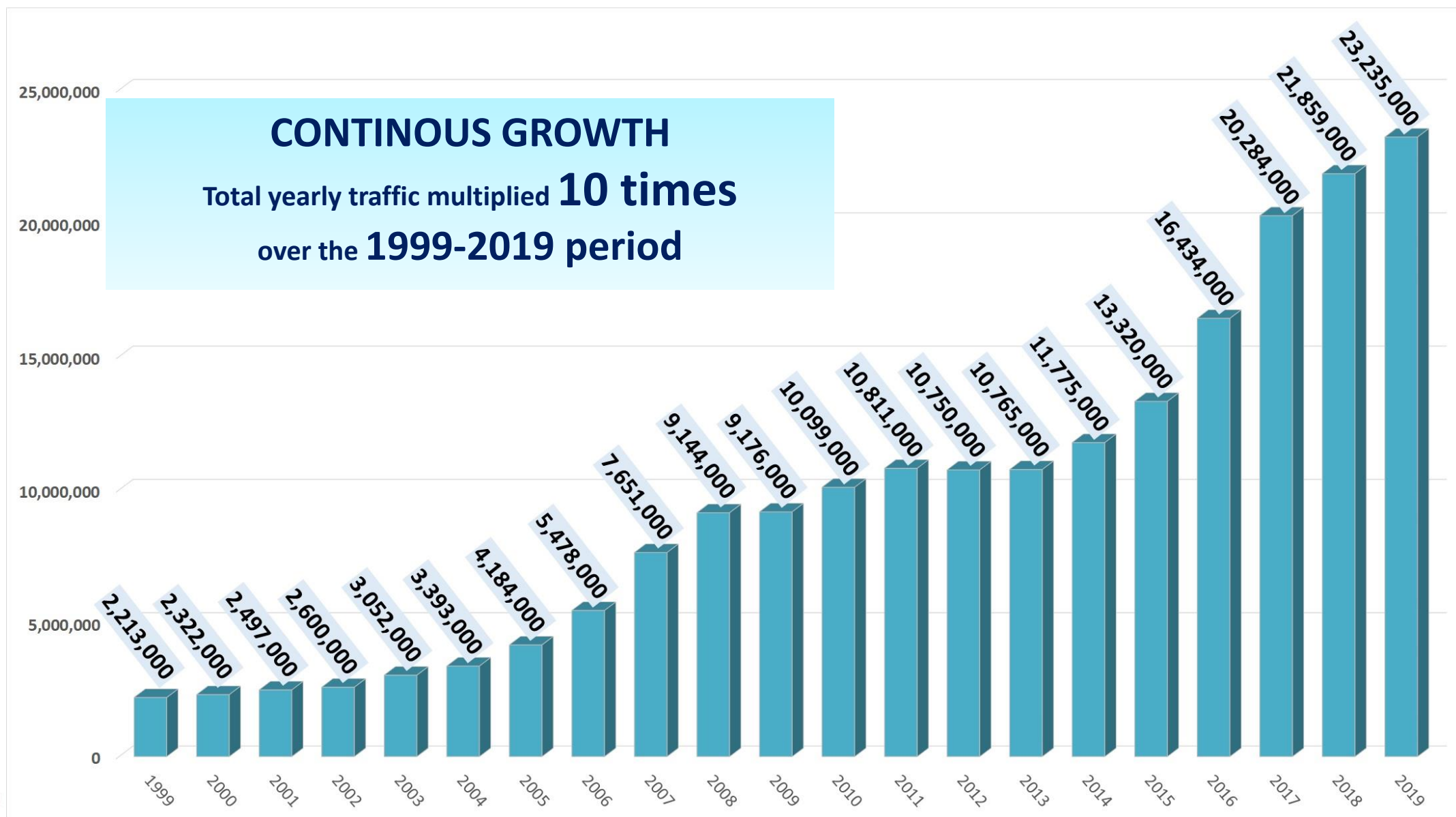


Romanian Airports - Location & Highlights

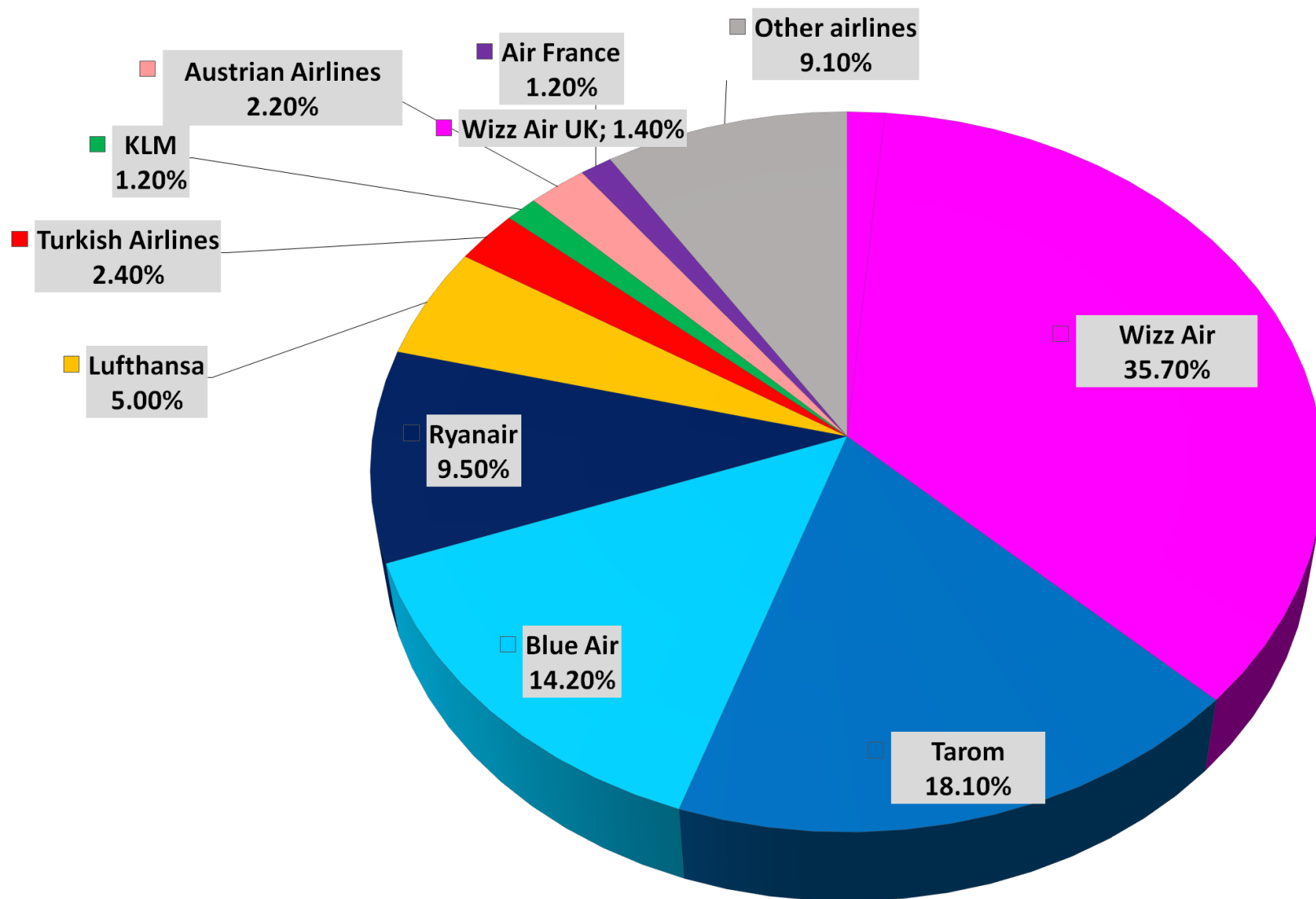


- 16 international airports
- 1 HUB & 15 regional airports
- Strong traffic recovery to 2019 numbers

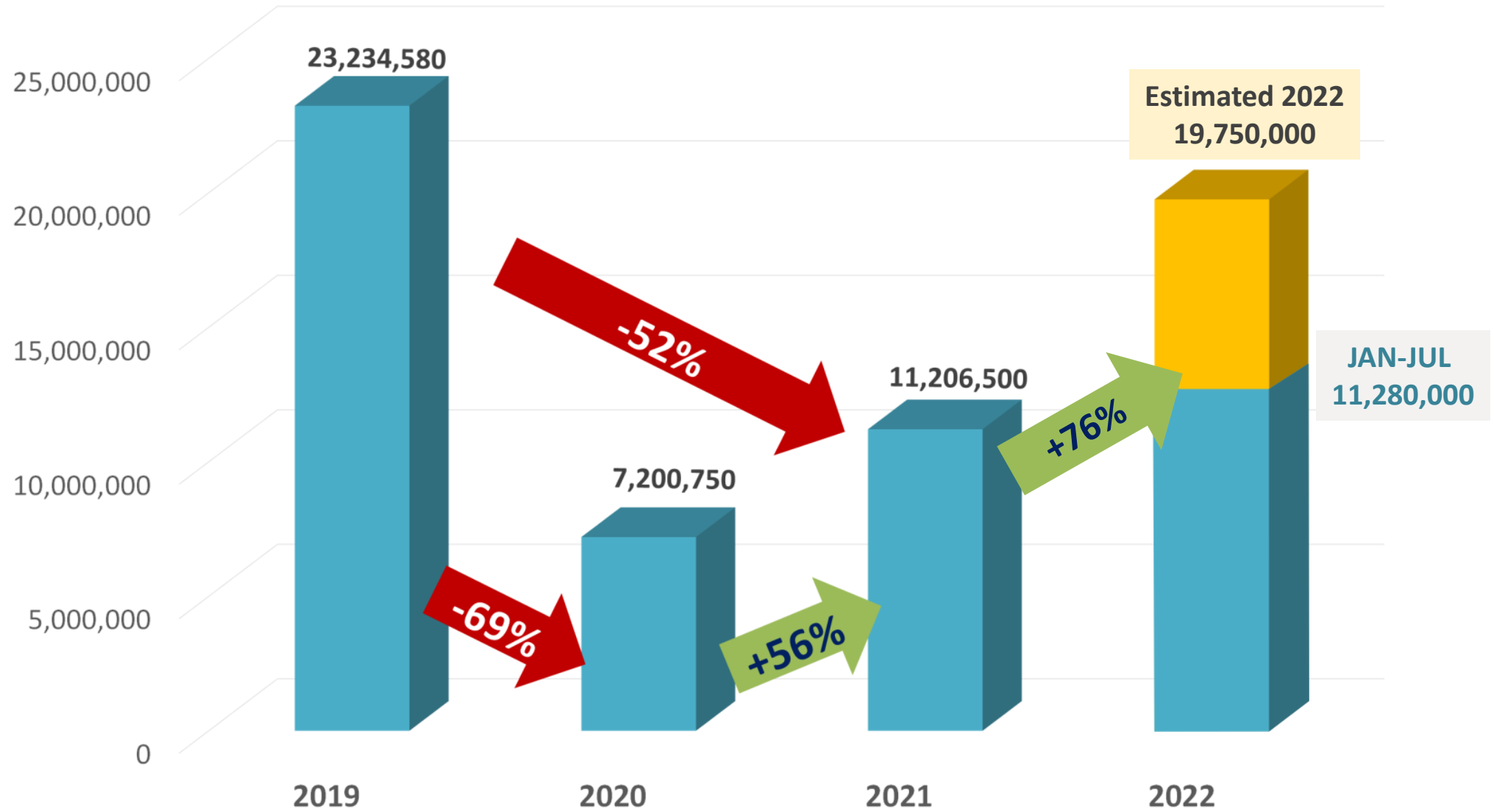
Romanian Airports - Traffic evolution 1999-2019



Romanian Airports - Airline market share by allocated capacity-2019



Romanian Airports - COVID-19 setback & recovery (1)



Romanian Airports - COVID-19 setback & recovery (2)

Estimated

YoY 2021 vs. 2019

48%

JAN-JUL 2022 vs. 2019

86%

YoY 2022 vs. 2019

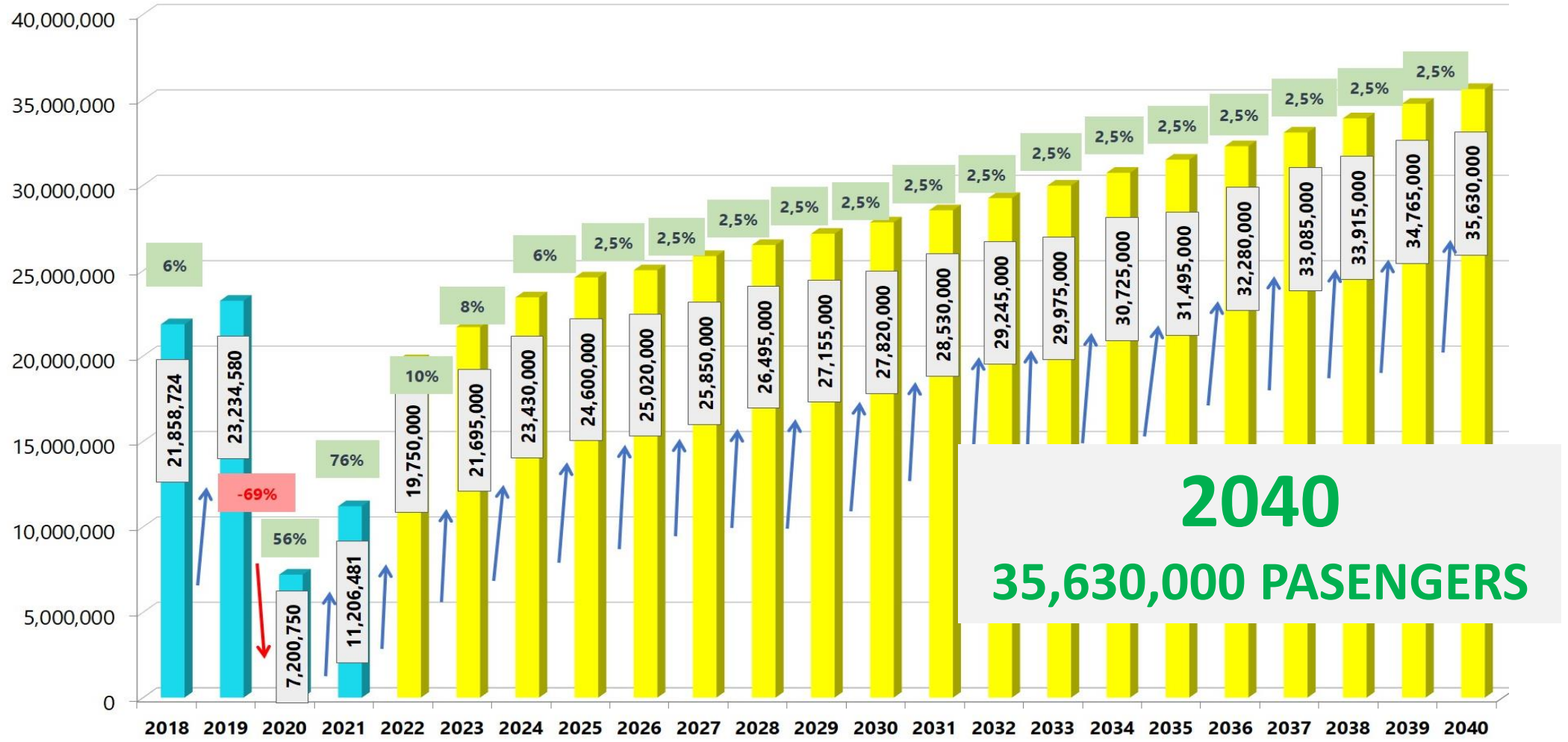
85%



RAA

Romanian Airports - Passengers Traffic forecast 2022-2040

PRUDENT Scenario



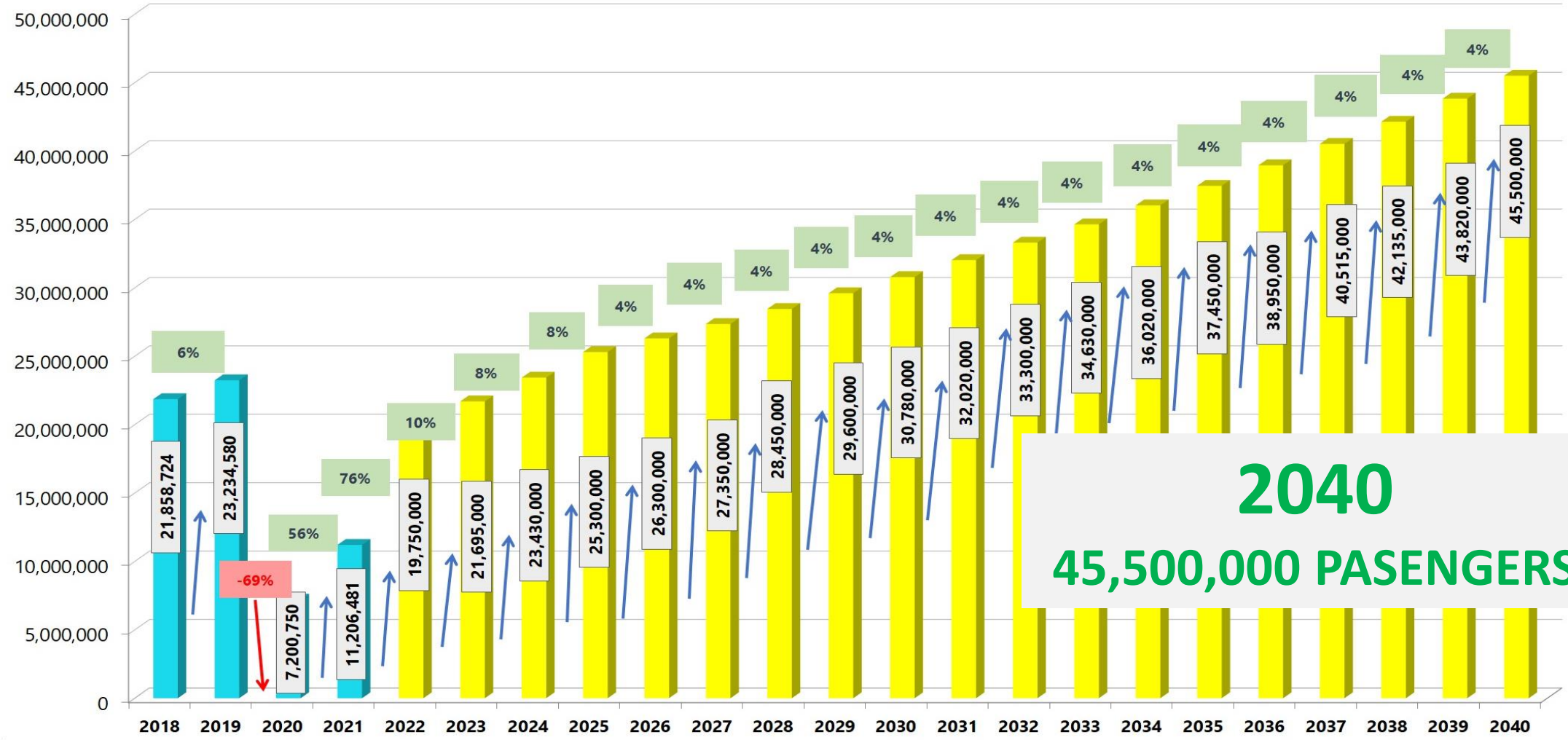
2040
35,630,000 PASSENGERS



RAA

Romanian Airports - Passengers Traffic forecast 2022-2040

BASE Scenario

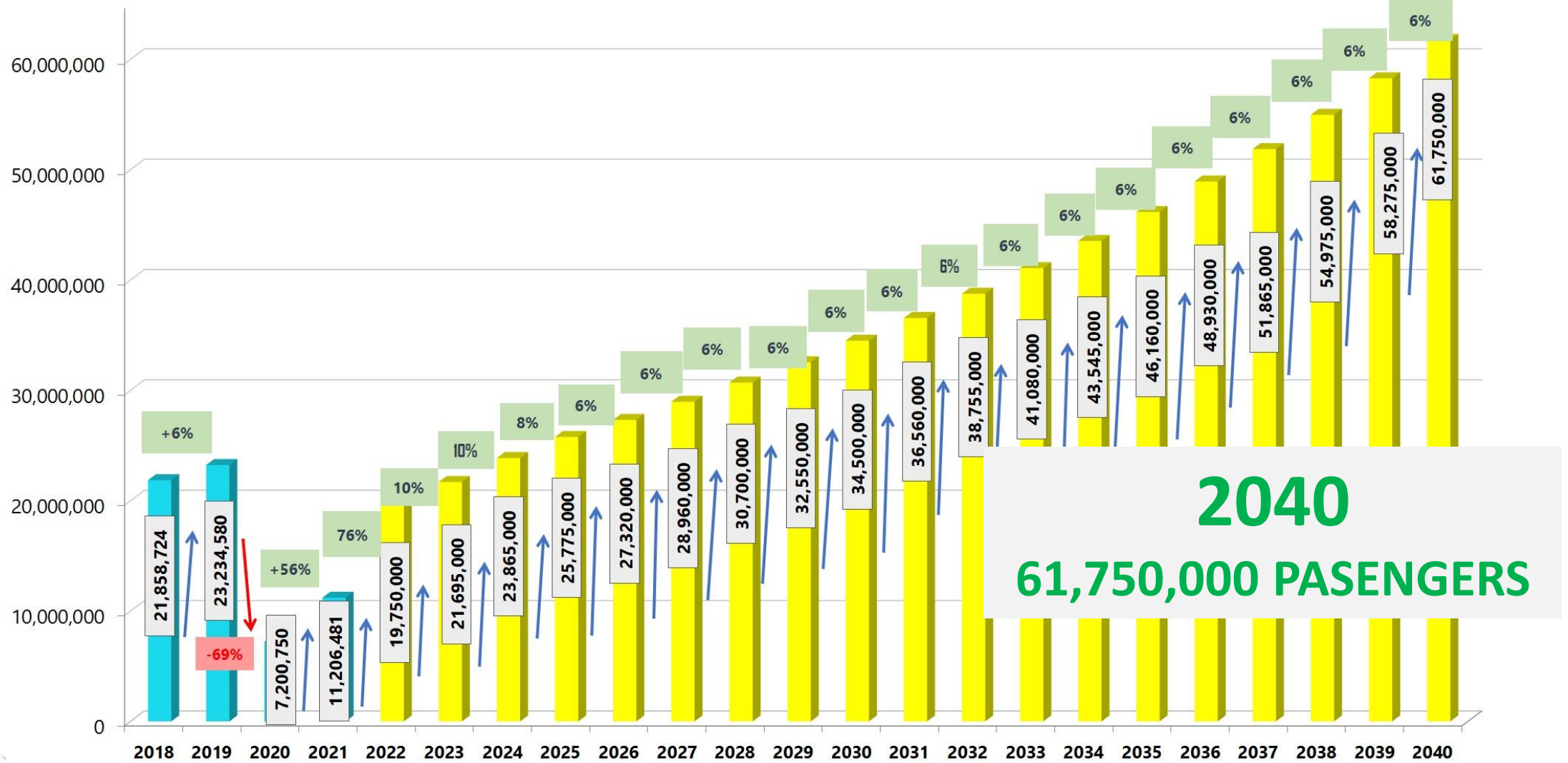


2040
45,500,000 PASSENGERS



Romanian Airports - Passengers Traffic forecast 2022-2040

OPTIMISTIC Scenario



2040
61,750,000 PASSENGERS

Cluj International Airport – Location & Basic information

Located in the center of
Transylvania
10 km East of **Cluj-Napoca**
City, Romania

**Modern airport
infrastructure**

Over **50 scheduled
destinations 20 countries** in
Europe and Middle East
10 scheduled carriers

1st regional airport of Romania
2nd airport of the country
after Bucharest Otopeni

2,921,000 passengers
in 2019
1,459,000 passengers
in 2021
(50% recovery)



Cluj International Airport – International recognition

In October 2021, Cluj International Airport won the award for *the best airport in Europe in the category under 5 million passengers annually*.

- CLJ unswerving focus on safeguarding jobs throughout the COVID-19 crisis
- CLJ swift recovery of passenger traffic
- CLJ airport's efforts to bring in new airlines and new routes with its strong incentives programme

Cluj "Avram Iancu" International Airport has won the **ATN Corporate Award** at the Air Transport Awards 2021.

The Air Transport 2021 Awards was organized by Hermes - Air Transport Organization, ATN - Air Transport News and ALA - Latin America Aeronoticias.



Cluj International Airport – Catchment area & Competition

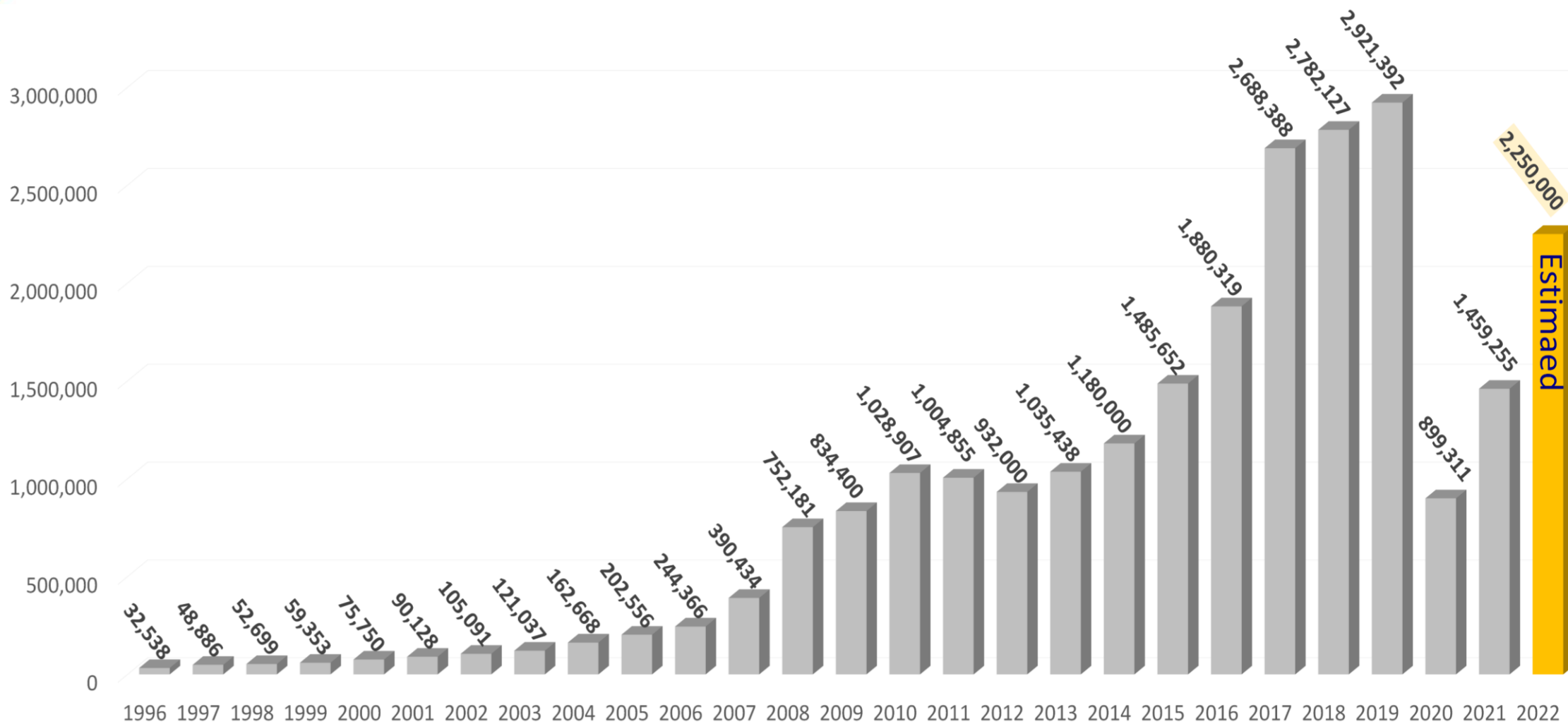
- One of the **fastest growing regional airports** in South-Eastern Europe and **the main airport** of Transylvania
- **3 hours flying time** to most of Europe
- 16 Romanian Airports – **high level of competition**
- **Hungarian airports (BUD & DEB) – strong international competition**
- **1 million people** can reach the airport within **1 hour driving time** and **2.5 million people** can reach the airport **within 2 hours**
- Expanded catchment area - more than **4 million people within 200 km** from the airport

CLUJ CATCHMENT AREA

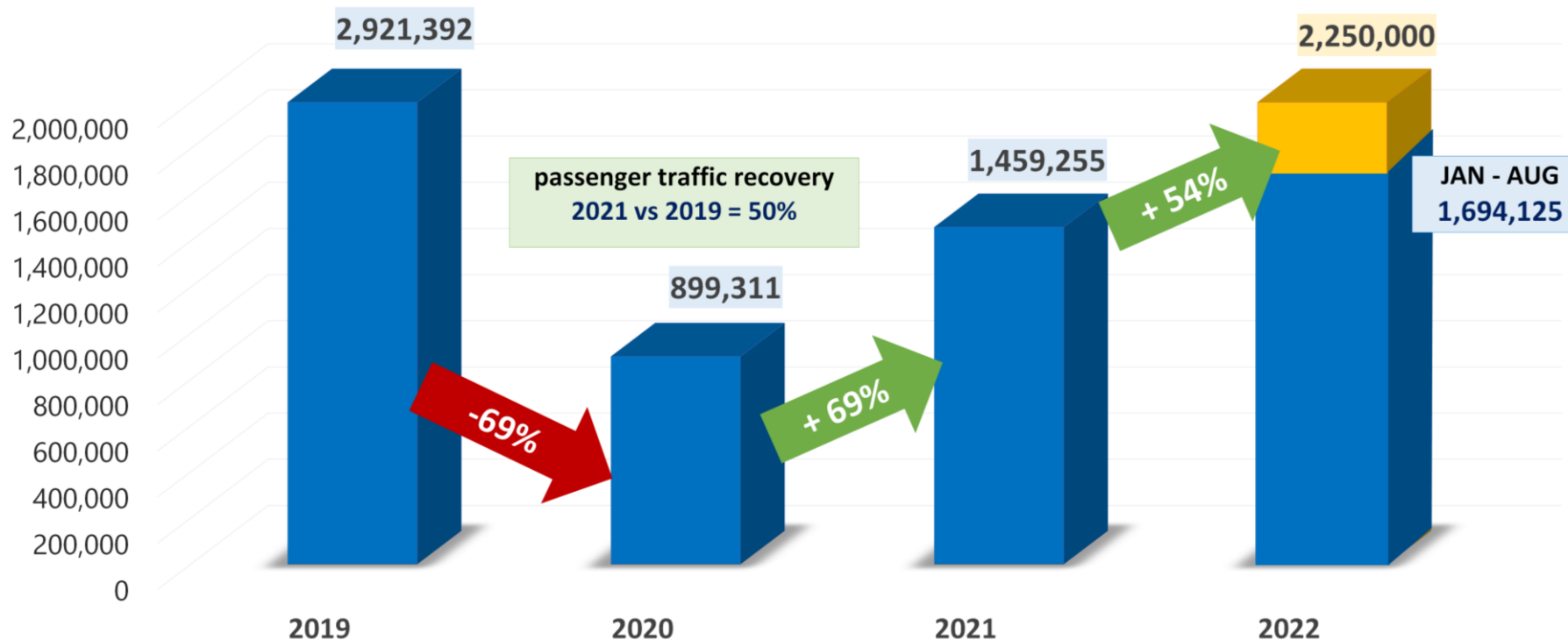
4 million inhabitants
in a 200 km radius



Cluj International Airport – Evolution of air traffic 1996-2022



Cluj International Airport – Total passenger traffic figures 2019-2022



2022
Record of registered passengers /day

12,288 pax
Registered on August 8th, 2022

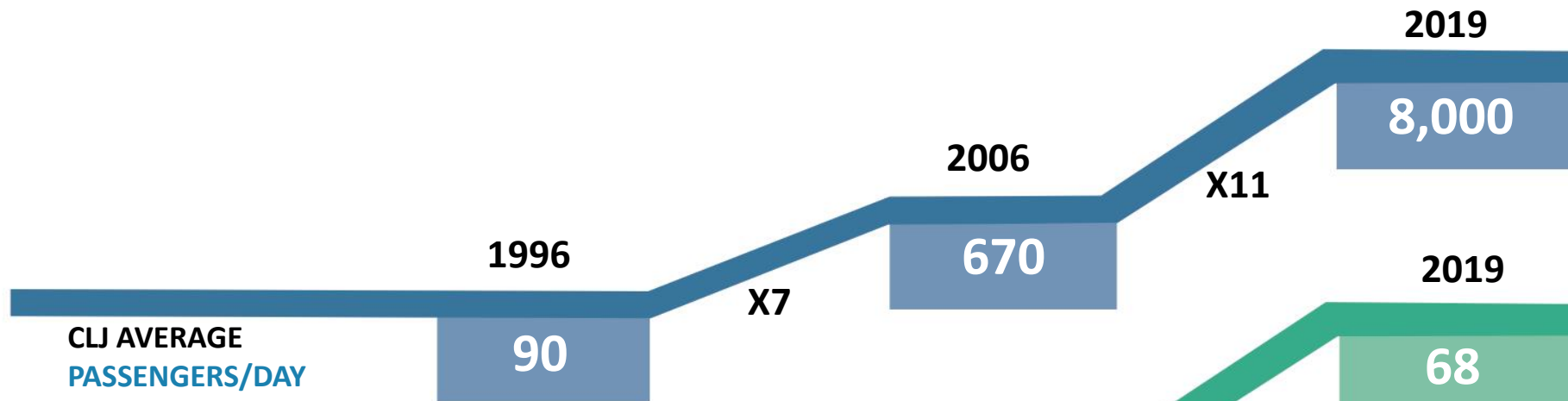
% recovery estimated in 2022 vs 2019

77%

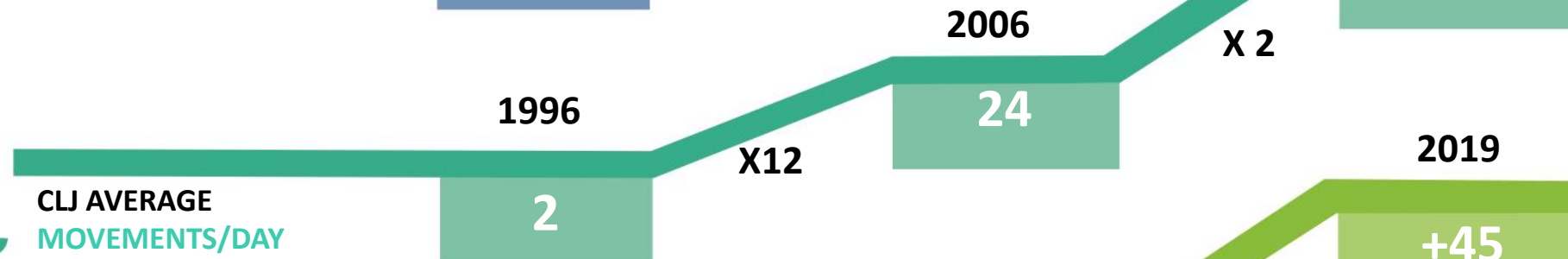
Cluj International Airport – Traffic key figures 1996-2022



CLJ AVERAGE PASSENGERS/DAY



CLJ AVERAGE MOVEMENTS/DAY



CLJ AVERAGE DESTINATIONS /YEAR

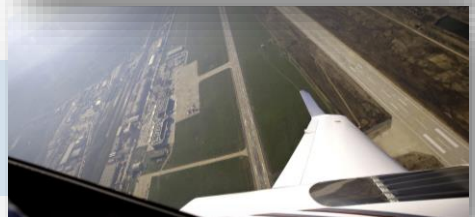


Implemented development projects

2008 - 2009 New terminals



2013 New Runway stage I – 2.100 m



2014, 2017, 2018 New aprons & movement surfaces



EU funding through LIOP/POIM

2022 Explosive detection equipment standard 3, CTX type



EU funding through LIOP/POIM

2022 Hand luggage scanning equipment standard C3



EU funding through LIOP/POIM

2022 Parallel taxiway (Phase 1)



EU funding through LIOP/POIM

2022 Firefighting and medical emergencies equipment



Future development projects

EU funding through LIOP/POIM

Extension of Passenger Departures Terminal on the north side

EU funding through LIOP/POIM

Integrated fire detection and alarm system

EU funding through LIOP/POIM

Parallel taxiway (Phase 2)

EU funding through LIOP/POIM

New aircraft parking aprons

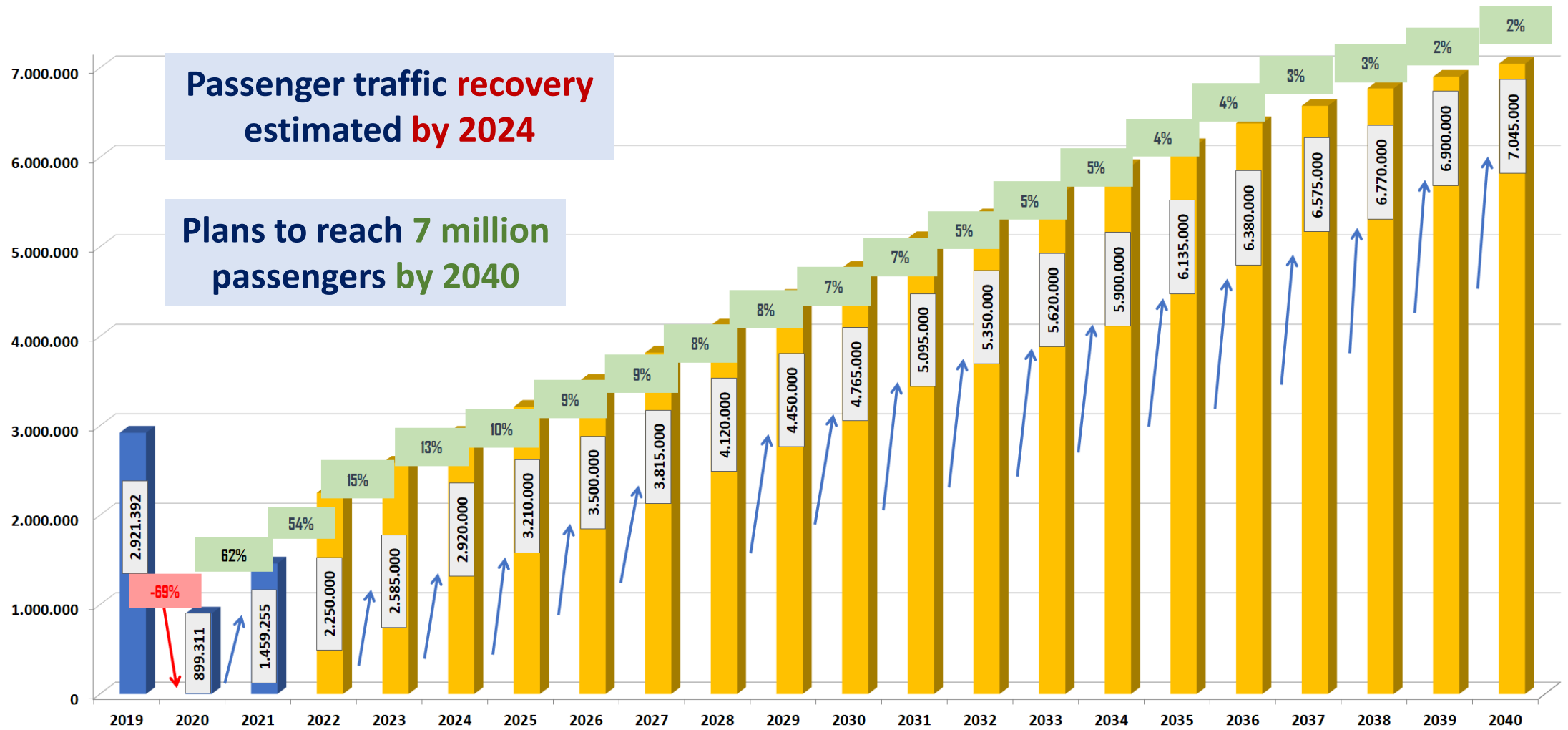
New Passenger Terminal

New runway, stage II – 3,500 m

Extension of Arrivals Terminal

Rescue & Firefighting building

Aircraft maintenance building



1. Continue to develop its infrastructure in order to ensure the **long-term positive evolution of air traffic**
2. Continue **to support its airlines and key stakeholders**
3. Continue to support the **2050 Net-Zero Carbon Emissions Aviation Goal**



Thank you!