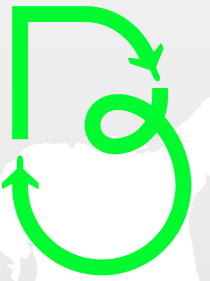


Asia & Pacific

ROUTES OPPORTUNITIES FROM BARCELONA

Unserved - Indirect O&D passengers 2024

Barcelona Air Route
Development Committee



● **BARCELONA**

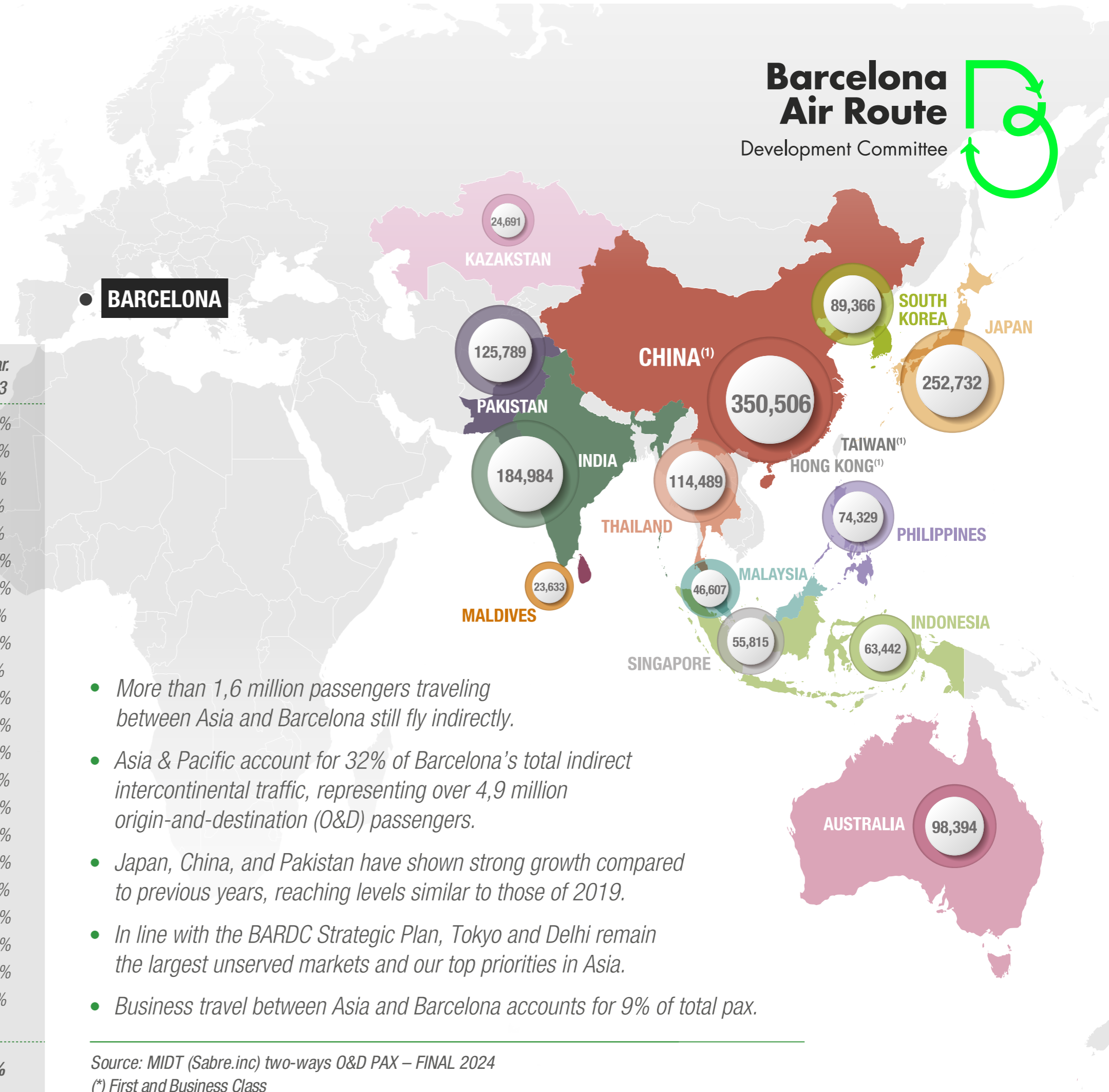
BCN – Asia & Pacific O&D Airports	Indirect pax 2024	% Business* 2024	% Var. 2023
Tokyo (NRT+HND)	175,306	11.3%	20.1%
Seoul (ICN)	82,214	7.7%	-4.2%
Delhi	91,300	7.7%	8.3%
Bangkok (BKK+DMK)	86,148	7%	21%
Shanghai (PVG+SHA)	85,017	11.7%	33%
Osaka (KIX+ITM+UKB)	66,751	8.5%	54.4%
Manila	65,001	6.7%	15.6%
Singapore	55,815	19.5%	3.3%
Lahore	55,542	0.6%	28.9%
Beijing (PEK+PKX)	45,648	8.2%	33%
Hong Kong	44,765	12.3%	17.9%
Islamabad	44,631	0.9%	11.5%
Kuala Lumpur	43,827	8.4%	36.7%
Mumbai	41,051	14.4%	-9.8%
Taipei	35,457	12.6%	23.3%
Sydney	34,623	19.9%	16.1%
Wenzhou	32,989	2.9%	52.0%
Denpasar	32,087	4.6%	-5.7%
Jakarta	28,102	10.3%	16.8%
Melbourne	26,895	19.7%	10.1%
Hanoi	25,571	3.1%	25.1%
Male	23,612	9.8%	7.7%
Other destinations	395,794		
Total Asia & Pacific - Indirect	1,618,146	9.1%	20%

- More than 1,6 million passengers traveling between Asia and Barcelona still fly indirectly.
- Asia & Pacific account for 32% of Barcelona's total indirect intercontinental traffic, representing over 4,9 million origin-and-destination (O&D) passengers.
- Japan, China, and Pakistan have shown strong growth compared to previous years, reaching levels similar to those of 2019.
- In line with the BARDC Strategic Plan, Tokyo and Delhi remain the largest unserved markets and our top priorities in Asia.
- Business travel between Asia and Barcelona accounts for 9% of total pax.

Source: MIDT (Sabre.inc) two-ways O&D PAX – FINAL 2024

(*) First and Business Class

(1) Included: Hong Kong (44,765 O&D PAX) and Taiwan (35,615 O&D PAX)

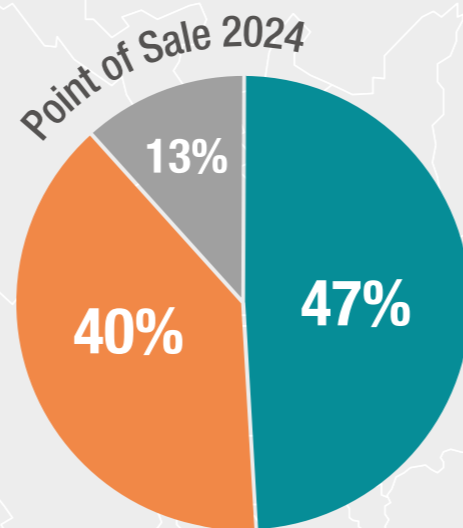


China

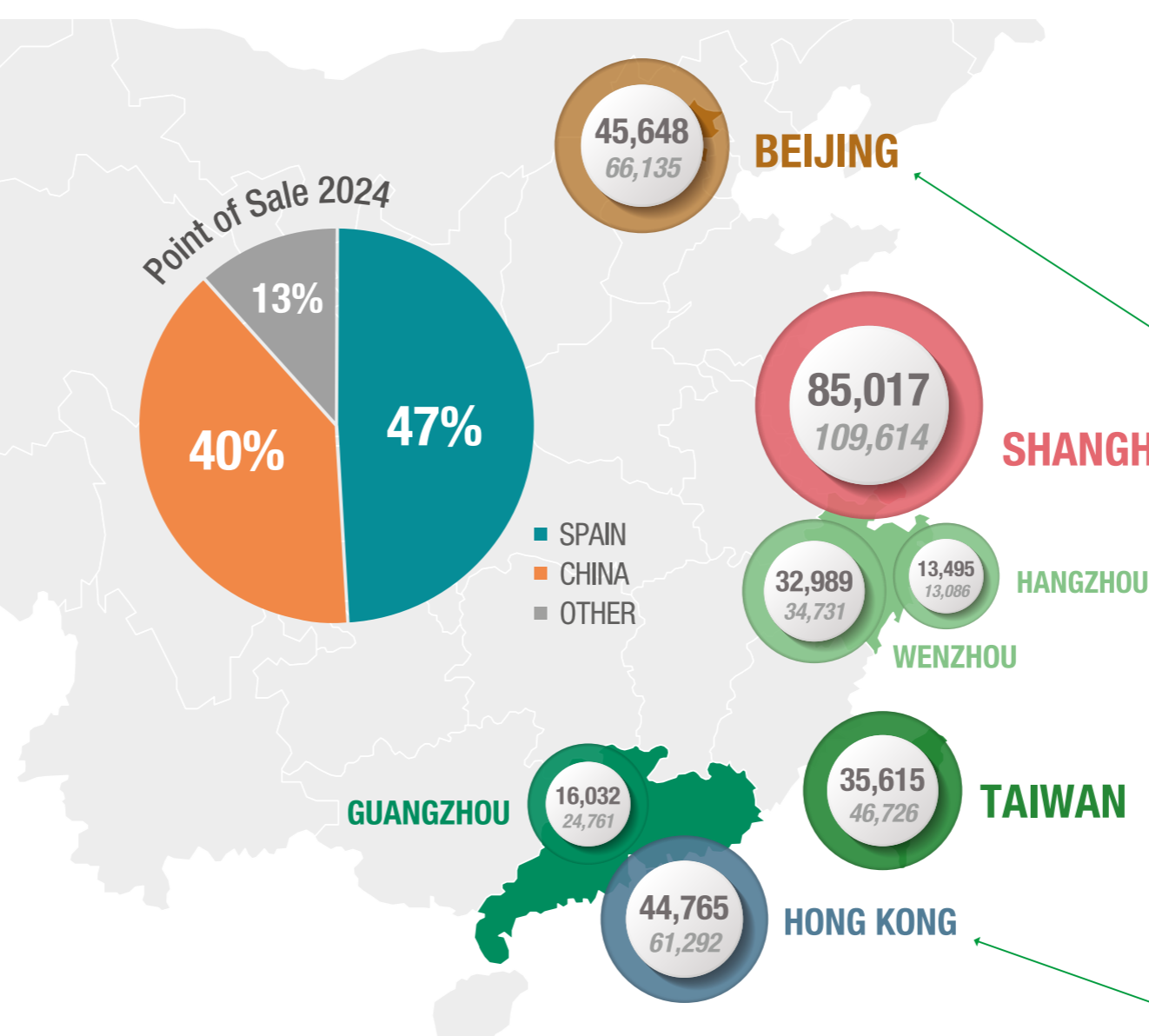
ROUTES OPPORTUNITIES FROM BARCELONA

Unserved - Indirect O&D passengers 2024

BCN-China Indirect O&D (9)	Indirect PAX 2019	Indirect PAX 2024
China (1)	425,191	350,506
Shanghai (2)	109,614	85,017
Hong Kong	61,292	44,765
Beijing (3)	66,135	45,648
Taiwan (4)	46,725	35,615
Wenzhou	34,731	32,989
Guangzhou	24,761	16,032
Hangzhou	13,086	13,495
Others	68,847	76,945



■ SPAIN
■ CHINA
■ OTHER



Barcelona Air Route Development Committee

Beijing the daily connection to the Capital of China is a must for institutional and international cooperation. (9)

Shanghai is the main commercial business capital for Catalonia and registers the highest indirect O&D traffic Barcelona-China as well as the number one cargo destination for Barcelona. (9)

The Greater Bay Area (GBA) is a region with great potential for an increase of frequencies and new direct routes for social, commercial and tourism purposes. (9)

- In 2024, a total of 647,801 Chinese travelers visited Spain, with Catalunya emerging as the top destination, attracting 57% of them. (5)
- Chinese travelers favor Nature Tourism (54%), followed by Beach & Sun (43%), Family & Friends travel (32%), Gastronomy (23%), Arts & Culture (21%), and Adventure/Sports, (20%), among other interests. (6)
- Spanish citizens can travel to China without a VISA for stays of up to 30 days. (7)
- In 2024, Asia & Pacific accounted for over 1.6 million O&D passengers in Barcelona (both direct and indirect), with China representing 21.6% of the total. (0)
- China is Catalonia's leading import partner by air. (8)

Air Exports from Catalonia to China in 2024 (1/8):

45%
18%
12%
0%
14%
11%



Others

TOTAL: 8,068 (tons)

Air Imports from China to Catalonia in 2024 (1/8):

6%
24%
31%
27%
1%
11%

TOTAL: 20,725 (tons)



(0) MIDT (Sabre.inc) two-ways O&D PAX - FINAL 2024

(1) Includes Hong Kong and Taiwan

(2) PVG + SHA

(3) PEK + PKX

(4) TPE + KHH + RMQ

(5) INE 2024

(6) Dragon Trail International 2024

(7) Chinese Government rule

(8) AEAT, 2024

(9) MIDT, SABRE-2024/2019

中国 直航巴塞罗那 市场机会分析

2024年始发地-目的地非直航潜在旅客

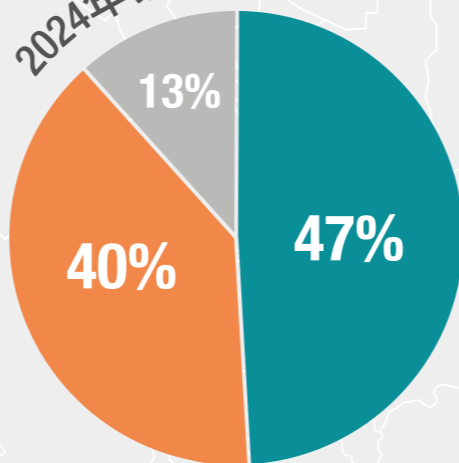
以巴塞罗那作为始发地
目的地 (O&D)
的非直航旅客 (9)

2019年非直航旅客

2024年非直航旅客

目的地	2019年非直航旅客	2024年非直航旅客
中国 (1)	425,191	350,506
上海 (2)	109,614	85,017
香港	61,292	44,765
北京 (3)	66,135	45,648
台湾 (4)	46,725	35,615
温州	34,731	32,989
广州	24,761	16,032
杭州	13,086	13,495
其它地区	68,847	76,945

2024年销售点



■ 西班牙
■ 中国
■ 其他

45,648
66,135

北京

85,017
109,614

上海

32,989
34,731

温州

13,495
13,086

杭州

35,615
46,726

台湾

16,032
24,761

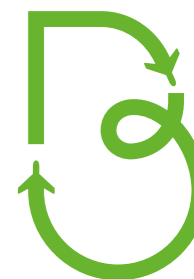
广州

44,765
61,292

香港

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北京：与中国首都每日直航是开展机构及商业合作的必要条件。(9)

上海是与加泰罗尼亚进行贸易往来的主要商业中心，也是以巴塞罗那为目的/始发地非直航旅客数量最大的中国城市。(9)

大湾区 (GBA) 极具潜力，以增设社会商业交往及旅游为目的的航线或增开班次。(9)

- 2024年共有64万7801名中国旅客前往西班牙，其中加泰罗尼亚 (57%) 是最受中国旅客欢迎的目的地。(5)
- 中国游客最喜爱的观光要素为自然风光 (54%)，其次为阳光海滩 (43%)、亲友同游 (32%)、美食 (23%)、艺术文化 (21%)、体育冒险 (20%) 等。(6)
- 西班牙公民无需签证即可前往中国大陆，最长停留时间为30天。(7)
- 2024年，亚太地区将巴塞罗那作为出发地或目的地的旅客 (O&D) 达160万人次 (包括直航和转机)，其中21.6%来自中国。(9)
- 中国是加泰罗尼亚第一大空运进口国。(8)

2024年加泰罗尼亚空运出口到中国 (1/8)

45%

18%

12%

0%

14%

11%

总计：8,068吨

2024年加泰罗尼亚从中国空运进口 (1/8)

6%

24%

31%

27%

1%

11%

总计：20,725吨



其它



信息来源：MIDT (塞博公司)
始发地及目的地双向旅客人次

(1) 包含香港及台湾
(2) 浦东机场PVG及虹桥机场SHA
(3) 首都机场PEK及大兴机场PKX

(4) 台北机场TPE、高雄机场KHH及台中机场RMQ
(5) 西班牙国家旅游局 (2024及)
(6) 龙途国际 (2024及)

(7) 中国政府规定
(8) 西班牙国家税务局 (2024及)
(9) MIDT (塞博公司, 2024及2019年)