

Global Aviation Monitor (GAM)

Analysis and Short Term
Outlook of Global, European
and German Air Transport

March 2009



Main Results of Global Air Transport Supply Analyses and Outlook

Background:

- Covers about 3.500 airports worldwide
- Covers about 850 airlines worldwide
- Air transport supply in 2008: Nearly 30 M flights (nonstop) worldwide
- Busiest month: July 2008 with 2.7 M flights
- Air traffic trends downwards since April 2008
- Forecasting methodology: Time series analysis

Analysis: April 2008 – March 2009

Global

- March 2009: 2.4 M flights supplied
- More than 9% decline in February and 5% decline in March 2009 compared to 2008
- Airports: Huge decline in the USA, increase at Beijing airport
- Airlines: 7 out of the 10 biggest airlines are from USA, with decreasing no. of flights offered

World Regions, Europe

- Largest decline worldwide in North America, reverse tendency in Middle East
- Airports: Decline of air transport supply at numerous airports, increase at Istanbul Airport
- Airlines: Large decline of flights of legacy carriers, e.g. British Airways, some growth in the low cost segment, e.g. Ryanair

Germany

- Decline of the no. of flights offered of nearly 5%
- Airports: General tendency downwards, however, Niederrhein airport grows by 50%
- Airlines: General tendency of supply downwards, however, some growth in the low-cost segment, e.g. Ryanair

Outlook: April – June 2009

Global

- For the next months a further decrease of 5% to 10% expected

World Regions, Europe

- Largest decreases expected in North-America, reverse tendency in Middle East

Germany

- Further decrease of the no. of flights offered of about 5% is expected

Rang	Airport	03/2009	Growth rate
1	Atlanta Hartsfield-Jackson Intl Apt	41.298	-0,3
2	Chicago O'Hare International Apt	35.270	-7,8
3	Dallas/Fort Worth Intl Apt	26.080	-2,6
4	Denver Intl Apt	25.707	-2,1
5	Houston George Bush Intercontinental Apt	22.981	-7,6
6	Los Angeles International Apt	21.953	-13,8
7	Paris Charles de Gaulle Apt	21.167	-0,2
8	Charlotte	20.307	0,8
9	London Heathrow Apt	20.078	-0,3
10	Beijing Capital Apt	19.659	24,8
11	Frankfurt International Apt	18.871	-2,7
12	Philadelphia International Apt	18.575	-2,1
13	Detroit Wayne County	18.392	-5,7
14	Madrid Barajas Apt	18.208	-7,7
15	Minneapolis International Apt	18.044	-0,4
16	New York J F Kennedy International Apt	17.852	-3,5
17	Newark Liberty International Apt	17.754	-1,4
18	Phoenix Sky Harbor Intl Apt.	17.601	-9,2
19	Munich International Airport	16.375	-1,6
20	Amsterdam	15.715	-6,9
21	New York La Guardia Apt	15.555	-6,8
22	Toronto Lester B Pearson Intl Apt	15.431	-2,8
23	Las Vegas McCarran International Apt	14.793	-15,9
24	Tokyo Haneda Apt	14.441	1,3
25	San Francisco International Apt	14.436	-3,4

Tab. 1: Number of monthly Take-off's at the biggest Airports in the World

Rang	Airport	03/2009	Growth rate
1	Frankfurt International Apt	18.871	-2,7
2	Munich International Airport	16.375	-1,6
3	Dusseldorf International Airport	8.305	1,2
4	Berlin Tegel Apt	6.194	2,1
5	Hamburg Airport	5.657	-5,7
6	Stuttgart Airport	4.547	-5,2
7	Cologne/Bonn K.A. Apt	3.600	1,0
8	Hanover	2.357	-7,5
9	Berlin Schoenefeld Apt	2.128	4,3
10	Nuremberg Apt	1.970	0,3
11	Frankfurt Hahn Airport	1.236	2,7
12	Bremen	1.212	-3,0
13	Dresden	1.021	3,8
14	Leipzig/Halle	884	7,3
15	Munster	763	18,3
16	Dusseldorf Niederrhein Airport	642	50,7
17	Friedrichshafen	536	14,0
18	Dortmund	508	-47,6
19	Saarbrücken Ensheim Airport	471	-5,2
20	Paderborn	354	-12,2
21	Karlsruhe/Baden Baden	344	-12,7
22	Hamburg Luebeck Airport	177	11,3
23	Memmingen	163	-3,0
24	Mannheim	157	5,4
25	Saarbrücken Zweibrücken Airport	117	37,6

Tab. 3: Number of monthly Take-off's at the biggest Airports in Germany

Rang	Airport	03/2009	Growth rate
1	Paris Charles de Gaulle Apt	21.167	-0,2
2	London Heathrow Apt	20.078	-0,3
3	Frankfurt International Apt	18.871	-2,7
4	Madrid Barajas Apt	18.208	-7,7
5	Munich International Airport	16.375	-1,6
6	Amsterdam	15.715	-6,9
7	Rome Fiumicino Apt	12.999	1,2
8	Barcelona Apt	11.307	-10,5
9	Vienna	9.843	-7,9
10	Istanbul Ataturk Airport	9.661	15,8
11	Paris Orly Apt	9.499	-4,0
12	Copenhagen Apt	9.464	-4,8
13	Zurich Airport	9.070	-1,8
14	Brussels Airport	8.790	-2,3
15	Oslo Airport	8.626	4,4
16	London Gatwick Apt	8.470	-11,7
17	Dusseldorf International Airport	8.305	1,2
18	Stockholm Arlanda Apt	8.203	1,6
19	Milan Malpensa Apt	7.461	-24,0
20	Helsinki	7.429	3,8
21	Dublin	7.130	-7,8
22	Athens Intl Eleftherios Venizelos Apt	6.742	1,3
23	Berlin Tegel Apt	6.194	2,1
24	Moscow Sheremetyevo International Apt	5.972	-9,1
25	Manchester International Apt	5.920	-16,3

Tab. 2: Number of monthly Take-off's on the biggest Airports in Europe

Source: OAG 2008/09, DLR 2008/09

Rang	Airline	03/2009	Growth rate
1	Delta Air Lines	112.815	-10,4
2	American Airlines	108.437	-10,8
3	United Airlines	101.060	-6,4
4	US Airways	100.885	-6,5
5	Southwest Airlines	99.384	-2,9
6	Continental Airlines	81.898	-10,7
7	Northwest Airlines	74.221	-2,8
8	Lufthansa German Airlines	58.595	1,4
9	Air France	48.941	-1,2
10	Air Canada	44.856	-5,7
11	China Southern Airlines	38.830	1,9
12	Ryanair	32.814	8,6
13	China Eastern Airlines	31.654	1,5
14	All Nippon Airways	30.851	-0,2
15	TAM Linhas Aereas	28.540	18,1
16	Iberia	28.240	0,0
17	Air China	27.416	13,7
18	British Airways	26.532	-12,6
19	Alaska Airlines	25.251	-16,3
20	SAS Scandinavian Airlines	24.999	1,5
21	easyJet	23.831	0,2
22	Japan Airlines International	23.717	-1,2
23	Gol Transportes Aereos	23.348	27,6
24	Qantas Airways	22.118	-3,0
25	AirTran Airways	21.407	-8,4

Tab. 4: Number of monthly Take-off's by the biggest Airlines in the World

Rang	Airline	03/2009	Growth rate
1	Lufthansa German Airlines	35.802	0,6
2	Air Berlin	9.592	-5,0
3	germanwings	3.250	-2,8
4	Ryanair	2.838	18,7
5	TUIfly	2.527	-21,3
6	Air France	2.016	8,2
7	KLM-Royal Dutch Airlines	1.326	-1,1
8	SAS Scandinavian Airlines	1.197	3,2
9	Austrian Airlines AG	1.173	-13,4
10	easyJet	1.144	-26,2
11	British Airways	1.103	-4,9
12	Swiss	1.015	-1,6
13	Cirrus Airlines	933	0,2
14	Condor Flugdienst	800	-29,7
15	LOT - Polish Airlines	723	-7,8
16	Turkish Airlines	658	10,8
17	Luxair	617	41,5
18	Intersky	583	24,3
19	Flybe	556	1,3
20	Aeroflot Russian Airlines	472	4,7
21	Czech Airlines	469	15,0
22	Iberia	438	-3,3
23	Blue Wings OLT Ostfriesische	374	---
24	Lufttransport GmbH	351	-63,6
25	Finnair	335	-16,0

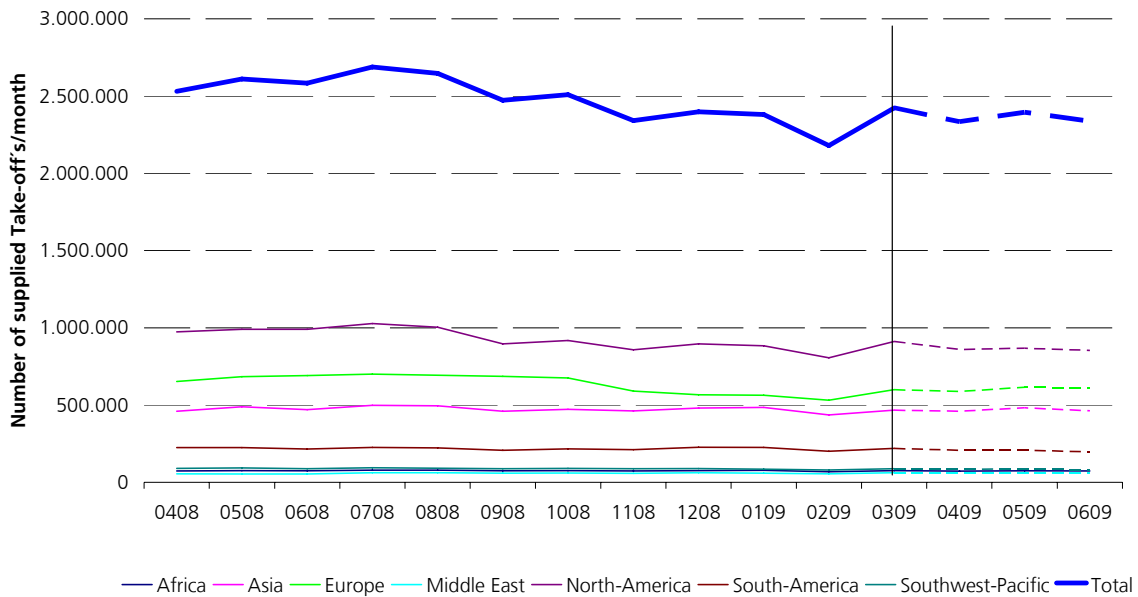
Tab. 6: Number of monthly Take-off's by the biggest Airlines in Germany

Rang	Airline	03/2009	Growth rate
1	Lufthansa German Airlines	54.831	1,9
2	Air France	45.148	-0,7
3	Ryanair	32.592	8,2
4	Iberia	27.144	-0,2
5	SAS Scandinavian Airlines	24.754	1,6
6	easyJet	23.501	-0,5
7	British Airways	21.729	-13,8
8	KLM-Royal Dutch Airlines	15.658	-5,7
9	Air Berlin	15.130	-4,0
10	Turkish Airlines	14.964	16,4
11	Flybe	13.341	22,5
12	Alitalia	11.398	-41,0
13	Austrian Airlines AG	11.296	-8,4
14	Swiss	10.640	1,8
15	Wideroe's Flyveselskap	9.024	14,1
16	TAP Air Portugal	8.007	-0,7
17	Finnair	7.778	8,1
18	Norwegian Air Shuttle	7.235	47,9
19	Air One	6.929	-9,3
20	Olympic Airlines	6.613	-4,8
21	bmi british midland	6.589	-4,4
22	LOT - Polish Airlines	6.430	-12,8
23	Czech Airlines	6.401	8,4
24	Aeroflot Russian Airlines	6.343	-7,5
25	Spanair	6.081	-28,3

Tab. 5: Number of monthly Take-off's by the biggest Airlines in Europe

Source: OAG 2008/09, DLR 2008/09

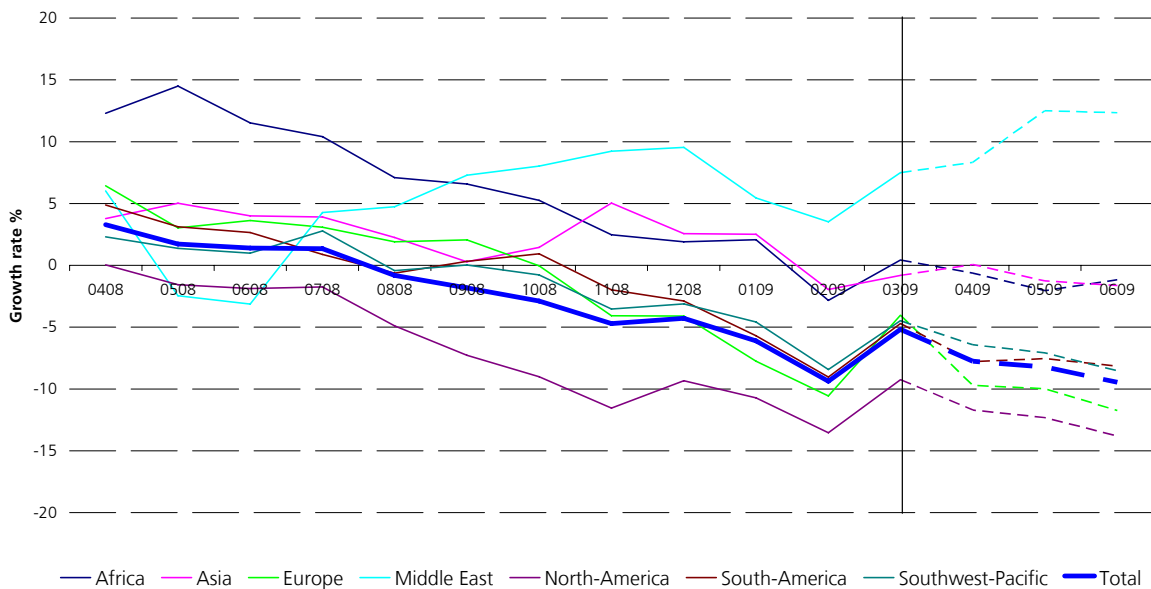
Development of the Global Air Transport Supply



Source: OAG 2008/2009, DLR 2008/2009

Fig. 1: Development of the Global Air Transport Supply

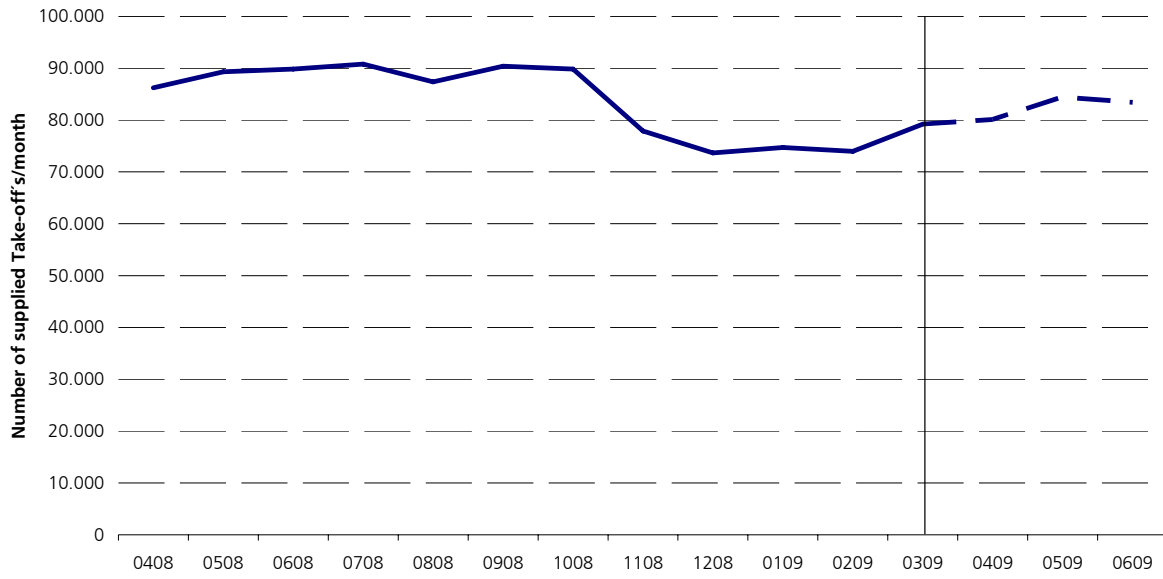
Changes in the Global Air Transport Supply



Source: OAG 2008/2009, DLR 2008/2009

Abb. 2: Changes in the Global Air Transport Supply

Development of the German Air Transport Supply



Source: OAG 2008/2009; DLR 2008/2009

Fig. 3: Development of the German Air Transport Supply

Changes in the German Air Transport Supply



Source: OAG 2008/2009; DLR 2008/2009

Abb. 4: Changes in the German Air Transport Supply

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