

Global Aviation Monitor (GAM)

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

December 2009



Main Results of Global Air Transport Supply Analysis and Outlook

Background:

- Covers about 3.500 airports worldwide
- Covers about 850 airlines worldwide
- Air transport supply in 2008: Nearly 30 M flights (non-stop) worldwide
- Air transport supply January – December 2009: 29.2 M flights (non-stop) worldwide
- Busiest month 2009: July with 2.6 M flights
- Air traffic shows downward trend since April 2008, turnaround in December 2009
- Forecasting methodology: Time series analysis

Analysis: January 2009 – December 2009

Global

- December 2009: 2.40 M flights supplied
- Turnaround! More than 6% decline in April, 3% decline in July, 1% decline in September and October, 0% in November and more than 1% increase in December 2009 compared to 2008
- Airports: Still large decline of traffic volume at many airports worldwide; however, more and more large US airports show a slow rise; strong growth at Beijing airport
- Airlines: 7 out of the 10 biggest airlines are from USA, mostly with decreasing no. of flights offered, but at a slower pace than the months before

World Regions, Europe

- Still decline of traffic in Europe and North America; however, at a slower pace; already strong growth in Asia
- Airports: Still decline of air transport supply at numerous European airports; however, strong increase at e.g. Istanbul and Moscow
- Airlines: Large decline of flights of legacy carriers, except e.g. Air China and China Eastern Airlines, some growth in the low cost segment, e.g. Ryanair and Easyjet

Germany

- Further decline of the no. of flights offered; however, at a slower pace (minus 1-2%)
- Airports: Heterogeneous traffic developments; some larger airports, e.g. DUS show first signs of recovery
- Airlines: Heterogeneous developments of number of flights offered: still decline in the legacy carrier segment, but large growth in the low cost segment

Outlook: December 2009 – February 2010

Global

- For the next months, a traffic increase of up to 5% is expected

World Regions, Europe

- With the beginning of 2010 air transport supply is expected to expand

Germany

- Only small decrease of air transport supply, turnaround is expected for the next months

Rank	Airport	12/2009	Growth rate
1	Atlanta Hartsfield-Jackson Intl	39.286	-0,4
2	Chicago O'Hare International	34.062	-0,4
3	Dallas/Fort Worth Intl	26.459	3,0
4	Denver Intl	25.007	2,1
5	Los Angeles International	22.262	1,9
6	Houston George Bush Intercontinental	22.113	-1,0
7	Beijing Capital	21.458	10,1
8	Charlotte	19.542	-0,5
9	Paris Charles de Gaulle	18.973	-6,4
10	London Heathrow	18.823	0,9
11	Frankfurt International	17.725	-0,5
12	Philadelphia International	17.389	-2,3
13	Detroit Wayne County	17.250	-5,0
14	Madrid Barajas	17.196	0,5
15	Phoenix Sky Harbor Intl .	16.822	-0,8
16	New York J F Kennedy International	16.483	-8,5
17	Minneapolis International	15.821	-6,2
18	Newark Liberty International	15.798	-6,3
19	Toronto Lester B Pearson Intl	14.843	-1,2
20	San Francisco International	14.701	3,2
21	New York La Guardia	14.496	-0,9
22	Tokyo Haneda	14.465	0,5
23	Amsterdam	14.273	-6,9
24	Las Vegas McCarran International	13.800	-6,5
25	Miami International	13.777	4,0

Tab. 1: Number of monthly Take-offs at the biggest Airports in the World

Rank	Airport	12/2009	Growth rate
1	Frankfurt International	17.725	-0,5
2	Munich International	13.654	-4,4
3	Dusseldorf International	7.299	1,3
4	Berlin Tegel	5.437	-3,5
5	Hamburg	5.282	4,7
6	Stuttgart	3.665	-12,5
7	Cologne/Bonn K.A.	3.453	6,8
8	Berlin Schoenefeld	2.185	9,9
9	Nuremberg	1.832	-2,9
10	Hanover	1.749	-14,9
11	Frankfurt Hahn	1.095	-11,2
12	Bremen	1.054	-1,8
13	Dresden	897	-2,0
14	Leipzig/Halle	827	9,0
15	Dusseldorf Niederrhein	678	15,1
16	Munster	621	-1,1
17	Dortmund	466	2,0
18	Friedrichshafen	380	-16,3
19	Saarbrücken/Ennsheim	355	-16,3
20	Karlsruhe/Baden Baden	351	6,0
21	Memmingen	310	106,7
22	Paderborn	224	-34,7
23	Hamburg Luebeck	168	-0,6
24	Mannheim	109	-41,1
25	Erfurt	93	-12,3

Tab. 3: Number of monthly Take-offs at the biggest Airports in Germany

Rank	Airport	12/2009	Growth rate
1	Paris Charles de Gaulle	18.973	-6,4
2	London Heathrow	18.823	0,9
3	Frankfurt International	17.725	-0,5
4	Madrid Barajas	17.196	0,5
5	Amsterdam	14.273	-6,9
6	Munich International	13.654	-4,4
7	Rome Fiumicino	12.399	-5,0
8	Istanbul Ataturk	10.332	12,0
9	Barcelona	9.942	-3,8
10	Vienna	9.216	-3,9
11	Zurich	9.014	1,8
12	Paris Orly	8.809	-1,5
13	London Gatwick	8.697	10,9
14	Copenhagen	7.922	1,3
15	Athens Intl Eleftherios Venizelos	7.385	12,0
16	Brussels	7.372	-5,6
17	Dusseldorf International	7.299	1,3
18	Moscow Domodedovo	7.093	14,3
19	Oslo	7.070	-0,7
20	Milan Malpensa	6.952	0,0
21	Moscow Sheremetyevo International	6.350	-4,1
22	Stockholm Arlanda	6.173	-6,9
23	Helsinki	5.922	-9,5
24	Dublin	5.609	-17,3
25	Berlin Tegel	5.437	-3,5

Tab. 2: Number of monthly Take-offs on the biggest Airports in Europe

Source: OAG 2008/09, DLR 2008/09

Rank	Airline	12/2009	Growth rate
1	American Airlines	107.521	0,1
2	Delta Air Lines	103.319	-5,4
3	United Airlines	97.944	2,2
4	US Airways	94.338	-2,8
5	Southwest Airlines	92.293	-5,7
6	Continental Airlines	76.232	-3,4
7	Northwest Airlines	67.128	-7,7
8	Lufthansa German Airlines	50.650	-3,3
9	China Southern Airlines	43.904	8,9
10	Air France	43.503	-5,3
11	Air Canada	42.548	-1,9
12	China Eastern Airlines	36.564	12,1
13	Ryanair	32.198	8,5
14	All Nippon Airways	31.097	-0,1
15	Air China	29.094	8,9
16	easyJet	26.786	21,5
17	TAM Linhas Aereas	25.445	-8,8
18	Gol Transportes Aereos	24.349	27,6
19	Alaska Airlines	24.128	-3,9
20	British Airways	23.462	-2,2
21	Japan Airlines International	23.375	-3,2
22	Iberia	22.811	-14,0
23	AirTran Airways	21.804	5,7
24	Qantas Airways	20.258	-5,8
25	Turkish Airlines	19.390	25,5

Tab. 4: Number of monthly Take-offs by the biggest Airlines in the World

Rank	Airline	12/2009	Growth rate
1	Lufthansa German Airlines	30.448	-4,7
2	Air Berlin	10.241	25,5
3	germanwings	3.485	12,1
4	Ryanair	2.761	6,5
5	Air France	1.614	-8,0
6	easyJet	1.296	21,1
7	KLM-Royal Dutch Airlines	1.169	-6,6
8	Austrian Airlines AG	1.129	-4,1
9	Swiss	1.069	6,5
10	British Airways	1.015	7,1
11	SAS Scandinavian Airlines	803	-10,9
12	Turkish Airlines	799	31,0
13	LOT - Polish Airlines	661	-0,5
14	Condor Flugdienst	648	-13,8
15	Luxair	585	2,5
16	Cirrus Airlines	575	-32,9
17	SunExpress	550	109,9
18	TUIfly	524	-76,9
19	Aeroflot Russian Airlines	506	6,8
20	Flybe	485	3,9
21	Intersky	443	-15,5
22	Czech Airlines	398	-16,0
23	Iberia	378	-6,4
24	Aegean Airlines	332	23,0
25	Adria Airways	278	-2,1

Tab. 6: Number of monthly Take-offs by the biggest Airlines in Germany

Rank	Airline	12/2009	Growth rate
1	Lufthansa German Airlines	47.068	-3,2
2	Air France	39.948	-5,1
3	Ryanair	31.788	7,9
4	easyJet	26.344	21,2
5	Iberia	21.610	-15,2
6	British Airways	18.667	-3,9
7	Turkish Airlines	17.568	25,0
8	SAS Scandinavian Airlines	17.070	-13,2
9	Air Berlin	15.892	21,4
10	KLM-Royal Dutch Airlines	13.689	-8,2
11	Flybe	12.003	0,7
12	Alitalia	11.405	-5,4
13	Swiss	11.153	2,9
14	Austrian Airlines AG	10.665	-2,5
15	Wideroe's Flyveselskap	7.711	0,1
16	TAP Air Portugal	7.632	-11,2
17	Norwegian Air Shuttle	7.033	25,0
18	Vueling Airlines	6.656	104,0
19	Aeroflot Russian Airlines	6.642	0,9
20	Olympic Airlines	6.300	-3,8
21	Finnair	6.069	-11,8
22	LOT - Polish Airlines	6.040	1,8
23	Aer Lingus	5.684	2,4
24	Czech Airlines	5.593	-10,4
25	Brussels Airlines	5.201	3,4

Tab. 5: Number of monthly Take-offs by the biggest Airlines in Europe

Source: OAG 2008/09, DLR 2008/09

Development of the Global Air Transport Supply

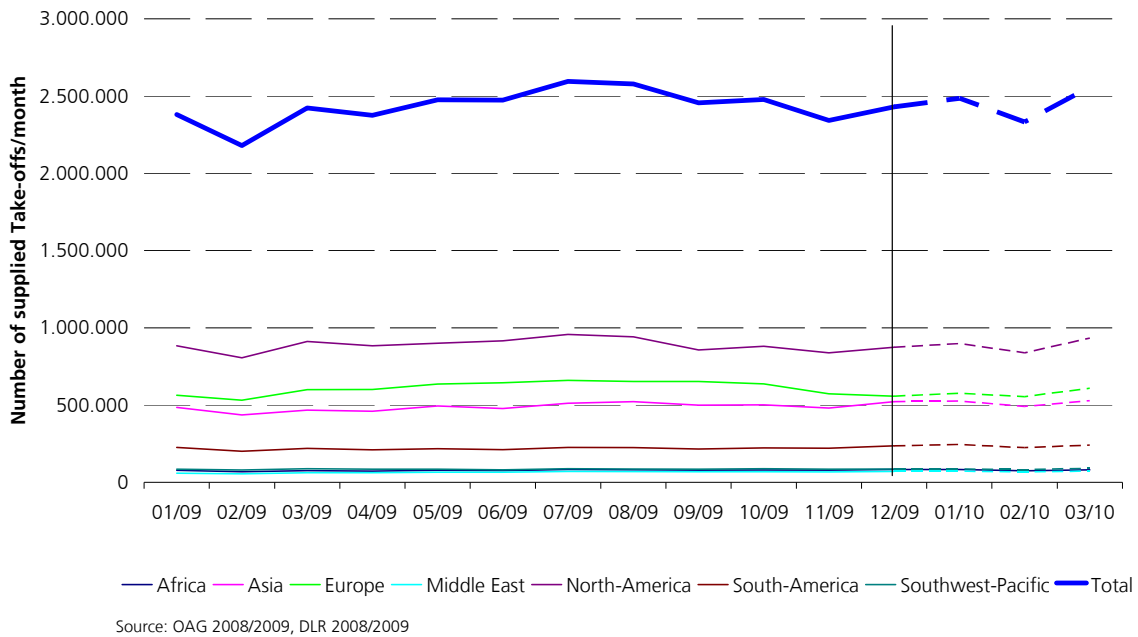


Fig. 1: Development of the Global Air Transport Supply

Changes in the Global Air Transport Supply

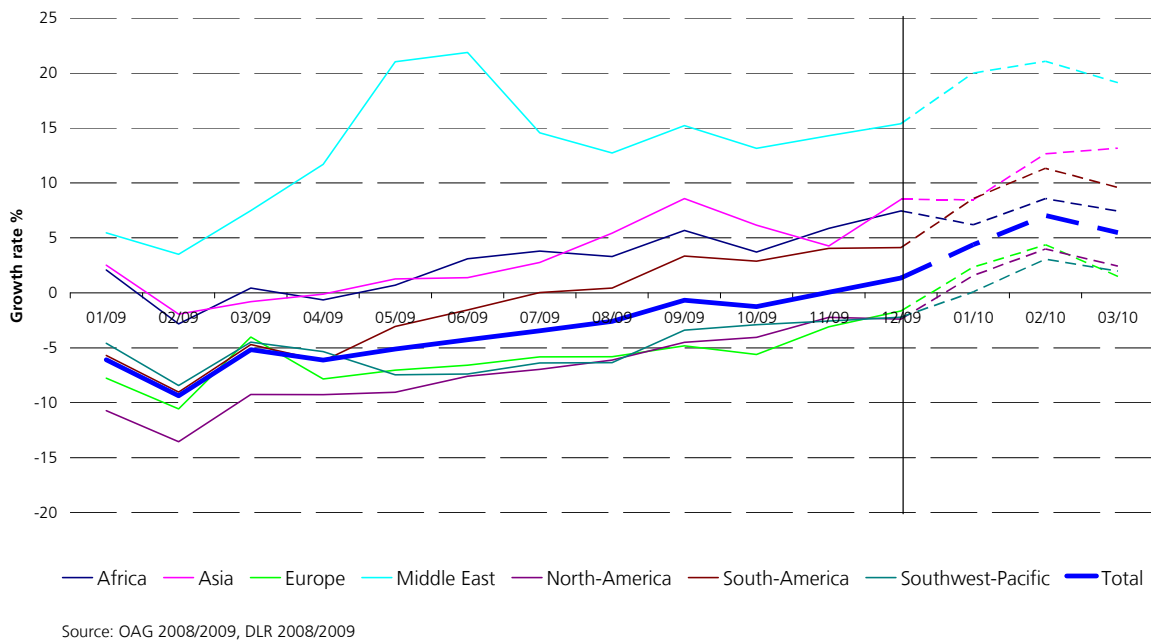


Fig. 2: Changes in the Global Air Transport Supply

Development of the German Air Transport Supply

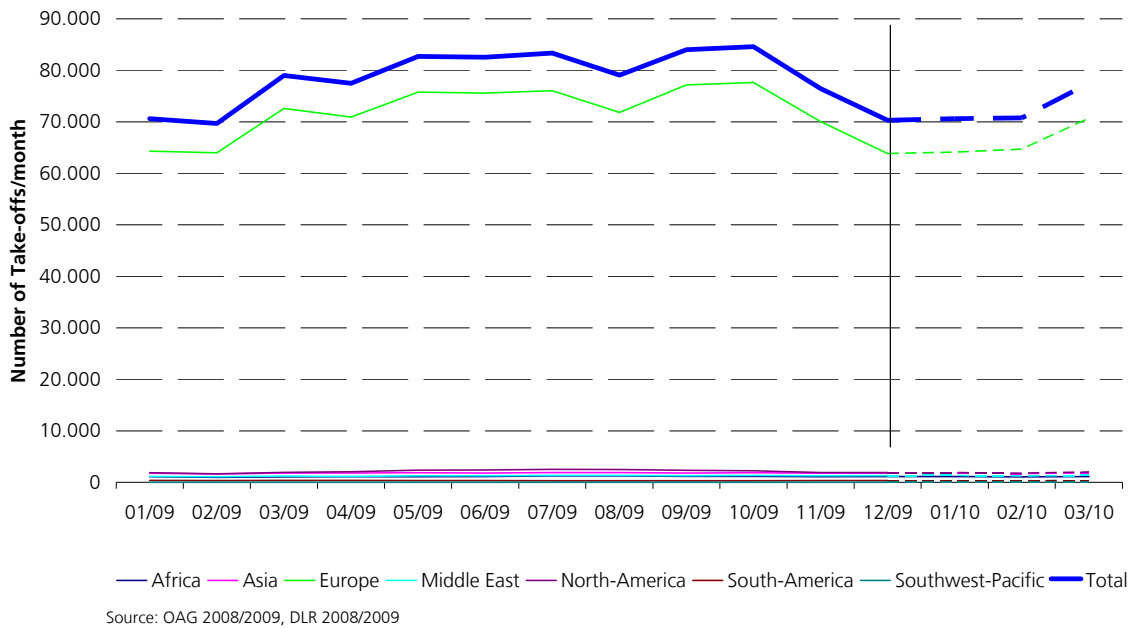


Fig. 3: Development of the German Air Transport Supply

Changes in the German Air Transport Supply

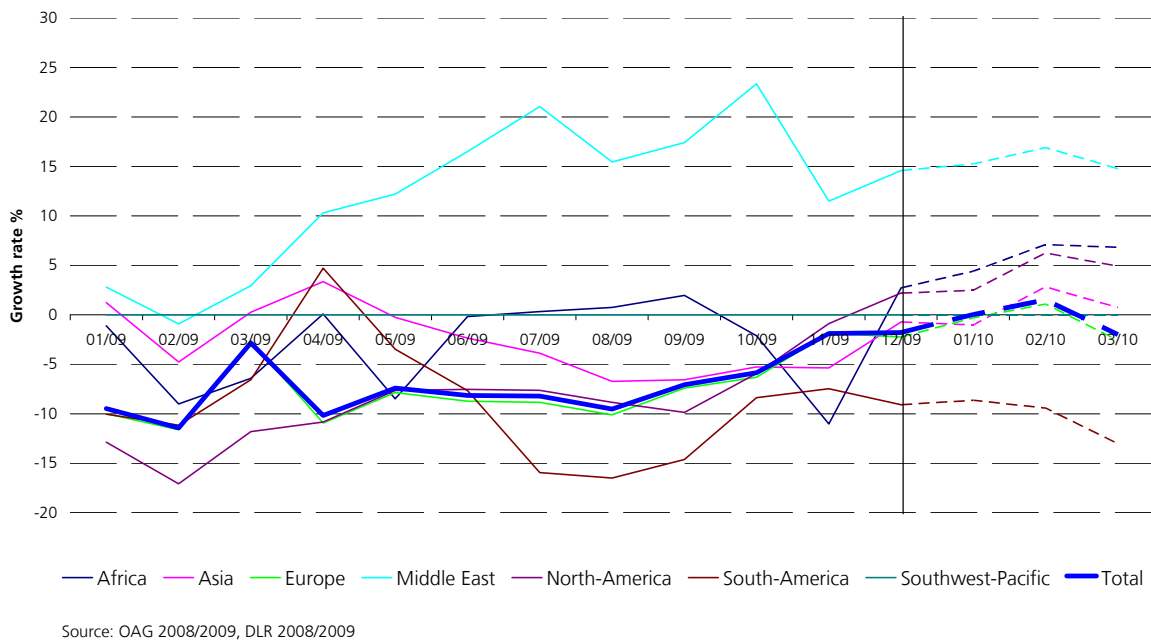


Fig. 4: Changes in the German Air Transport Supply

Authors:

Dr. Peter Berster
DLR
Flughafenwesen und Luftverkehr
D-51147 Köln
E-Mail: peter.berster@dlr.de

Dr. Marc Gelhausen
DLR
Flughafenwesen und Luftverkehr
D-51147 Köln
E-Mail: marc.gelhausen@dlr.de

Holger Pabst
DLR
Flughafenwesen und Luftverkehr
D-51147 Köln
E-Mail: holger.pabst@dlr.de

Dieter Wilken
DLR
Flughafenwesen und Luftverkehr
D-51147 Köln
E-Mail: dieter.wilken@dlr.de