

Global Aviation Monitor (GAM)

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

September 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 (nonstop) worldwide
- Busiest month: July 2008 with 2.7 M flights
- Air traffic trends downwards since April 2008
- Forecasting methodology: Time series analysis

Analysis: October 2008 – September 2009

Global

- September 2009: 2.46 M flights supplied
- More than 6% decline in April, 3,4% decline in July and only 1% decline in September 2009 compared to 2008
- Airports: Huge traffic decline in the USA, however at some airports signs of green shots e.g. Atlanta; increase at Beijing airport
- Airlines: 5 out of the 10 biggest airlines are from USA, most with decreasing no. of flights offered, but at a slower pace than the months before

World Regions, Europe

- Largest decline worldwide in North America and Europe, however, some growth in Asia again
- Airports: Decline of air transport supply at numerous airports, increase at Istanbul Airport
- Airlines: Large decline of flights of legacy carriers, except e.g. Air China, some growth in the low cost segment, e.g. Ryanair

Germany

- Further decline of the no. of flights offered of nearly 7-9%

Outlook: October – December 2009

Global

- For the next months, a further traffic decrease of only 1% to 0% is expected

World Regions, Europe

- Reverse tendency in USA, largest decreases in Europe, but first reverse tendency, too

Germany

- Further decrease of the no. of flights offered of about 7% is expected

Rank	Airport	09/2009	Growth rate
1	Atlanta Hartsfield-Jackson Intl	38.725	2,3
2	Chicago O'Hare International	34.069	-5,1
3	Dallas/Fort Worth Intl	25.609	-1,5
4	Denver Intl	23.765	0,5
5	Los Angeles International	21.139	-3,9
6	Beijing Capital	20.739	8,6
7	Paris Charles de Gaulle	20.289	-7,1
8	Houston George Bush Intercontinental	19.682	-6,5
9	Frankfurt International	19.234	-5,0
10	London Heathrow	19.033	-5,2
11	Charlotte	18.466	-3,4
12	Madrid Barajas	18.073	-2,7
13	Philadelphia International	17.430	-1,2
14	Detroit Wayne County	16.561	-5,5
15	Munich International	16.401	-8,6
16	Amsterdam	16.395	-7,0
17	New York J F Kennedy International	16.123	-8,8
18	Minneapolis International	15.526	-4,2
19	Phoenix Sky Harbor Intl .	15.387	-5,1
20	Newark Liberty International	15.369	-5,8
21	Toronto Lester B Pearson Intl	15.334	-6,5
22	New York La Guardia	14.736	-7,8
23	San Francisco International	14.597	1,8
24	Las Vegas McCarran International	14.172	-6,1
25	Mexico City Juarez International	13.822	3,3

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

Rank	Airport	09/2009	Growth rate
1	Frankfurt International	19.234	-5,0
2	Munich International	16.401	-8,6
3	Dusseldorf International	9.055	-3,9
4	Berlin Tegel	6.424	-2,1
5	Hamburg	6.133	-8,2
6	Stuttgart	4.976	-11,8
7	Cologne/Bonn K.A.	4.424	-5,3
8	Hanover	2.563	-9,2
9	Berlin Schoenefeld	2.376	-1,0
10	Nuremberg	2.029	-2,0
11	Frankfurt Hahn	1.413	-1,9
12	Bremen	1.226	-9,3
13	Dresden	1.080	-11,7
14	Leipzig/Halle	1.067	4,6
15	Dusseldorf Niederrhein	830	93,9
16	Munster	812	-11,5
17	Dortmund	537	-43,4
18	Friedrichshafen	507	-9,3
19	Saarbrücken Ensheim	486	-16,1
20	Karlsruhe/Baden Baden	435	3,3
21	Memmingen	389	93,5
22	Paderborn	350	-31,4
23	Hamburg Luebeck	253	52,4
24	Westerland	181	-14,6
25	Erfurt	150	-26,5

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

Rank	Airport	09/2009	Growth rate
1	Paris Charles de Gaulle	20.289	-7,1
2	Frankfurt International	19.234	-5,0
3	London Heathrow	19.033	-5,2
4	Madrid Barajas	18.073	-2,7
5	Munich International	16.401	-8,6
6	Amsterdam	16.395	-7,0
7	Rome Fiumicino	13.739	-9,4
8	Barcelona	11.400	-7,4
9	London Gatwick	10.723	1,3
10	Istanbul Ataturk	10.669	12,4
11	Vienna	10.568	-5,4
12	Copenhagen	9.768	-9,2
13	Zurich	9.556	-0,4
14	Paris Orly	9.499	-2,6
15	Dusseldorf International	9.055	-3,9
16	Brussels	8.981	-7,0
17	Oslo	8.859	-7,3
18	Athens Intl Eleftherios Venizelos	8.558	11,3
19	Stockholm Arlanda	7.984	-15,5
20	Palma Mallorca	7.793	1,8
21	Milan Malpensa	7.428	-9,0
22	Helsinki	7.185	-4,6
23	Moscow Domodedovo	7.065	-3,1
24	Manchester International	6.604	-13,3
25	London Stansted	6.594	-12,8

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

Source: OAG 2008/09, DLR 2008/09

Rank	Airline	09/2009	Growth rate
1	American Airlines	102.883	-7,1
2	Delta Air Lines	100.400	-3,9
3	United Airlines	96.002	-0,8
4	US Airways	92.865	-3,5
5	Southwest Airlines	89.769	-8,5
6	Continental Airlines	69.579	-6,3
7	Northwest Airlines	64.840	-8,0
8	Lufthansa German Airlines	58.682	-7,0
9	Air France	46.023	-8,1
10	China Southern Airlines	45.553	10,1
11	Air Canada	44.782	-3,0
12	Ryanair	37.739	14,6
13	China Eastern Airlines	36.380	14,2
14	easyJet	31.971	13,6
15	All Nippon Airways	29.557	-2,2
16	Air China	28.685	9,2
17	TAM Linhas Aereas	26.348	3,6
18	Iberia	26.071	-5,6
19	British Airways	25.230	-12,9
20	SAS Scandinavian Airlines	23.818	-15,1
21	Alaska Airlines	23.594	-9,8
22	Gol Transportes Aereos	22.987	30,2
23	Japan Airlines International	22.933	-5,2
24	Qantas Airways	20.403	-9,0
25	AirTran Airways	19.509	1,8

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

Rank	Airline	09/2009	Growth rate
1	Lufthansa German Airlines	35.453	-9,0
2	Air Berlin	11.066	-5,4
3	germanwings	3.802	-6,1
4	TUIfly	3.736	-14,0
5	Ryanair	3.387	27,9
6	Air France	1.784	-8,4
7	Condor Flugdienst	1.478	-9,7
8	KLM-Royal Dutch Airlines	1.377	-0,2
9	easyJet	1.359	-16,1
10	Austrian Airlines AG	1.281	-3,5
11	SAS Scandinavian Airlines	1.192	-13,1
12	British Airways	1.163	1,1
13	Swiss	1.029	1,9
14	Cirrus Airlines	856	-24,5
15	Turkish Airlines	808	-0,1
16	LOT - Polish Airlines	702	-6,1
17	Luxair	624	1,5
18	Flybe	607	9,2
19	Intersky	560	-16,5
20	Aeroflot Russian Airlines	474	1,1
21	Czech Airlines	454	3,2
22	Iberia	404	-8,4
23	OLT Ostfriesische Lufttransport GmbH	400	-66,7
24	SunExpress	344	46,4
25	Brussels Airlines	326	-4,7

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

Rank	Airline	09/2009	Growth rate
1	Lufthansa German Airlines	54.883	-6,9
2	Air France	42.430	-8,4
3	Ryanair	37.487	14,2
4	easyJet	31.666	13,4
5	Iberia	24.913	-6,0
6	SAS Scandinavian Airlines	23.590	-15,1
7	British Airways	20.586	-15,1
8	Air Berlin	18.103	-4,8
9	Turkish Airlines	16.986	8,4
10	KLM-Royal Dutch Airlines	15.786	-7,9
11	Flybe	14.725	10,5
12	Alitalia	12.678	-22,3
13	Austrian Airlines AG	12.176	-7,0
14	Swiss	11.121	4,2
15	Wideroe's Flyveselskap	8.782	-1,5
16	Norwegian Air Shuttle	8.732	17,3
17	TAP Air Portugal	7.873	-7,3
18	Olympic Airlines	7.377	0,9
19	Finnair	7.185	-0,3
20	Vueling Airlines	7.104	77,3
21	LOT - Polish Airlines	6.914	0,7
22	Aeroflot Russian Airlines	6.621	-12,4
23	TUIfly	6.619	-12,6
24	Czech Airlines	6.571	-1,1
25	Aer Lingus	6.364	3,1

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

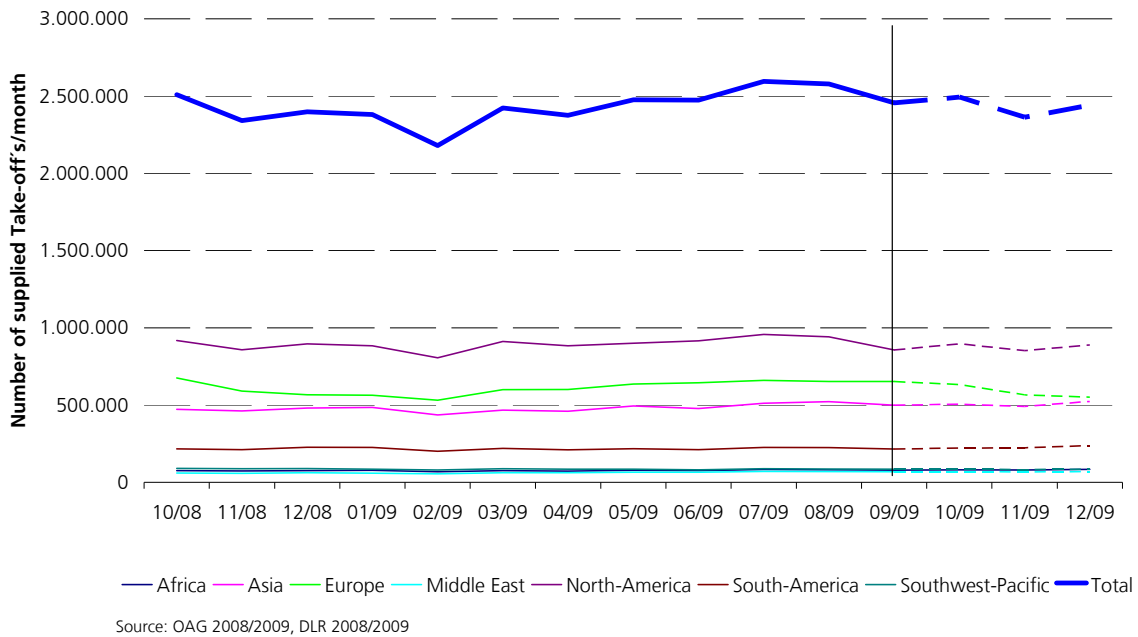


Fig. 1: Development of the Global Air Transport Supply

Changes in the Global Air Transport Supply

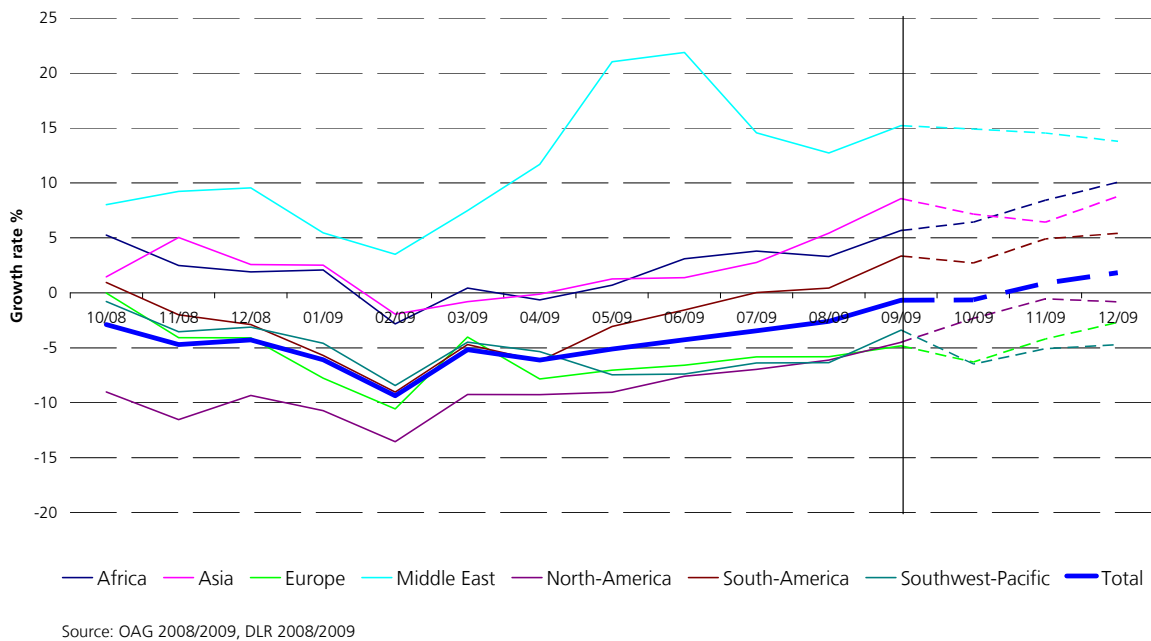


Fig. 2: Changes in the Global Air Transport Supply

Development of the German Air Transport Supply

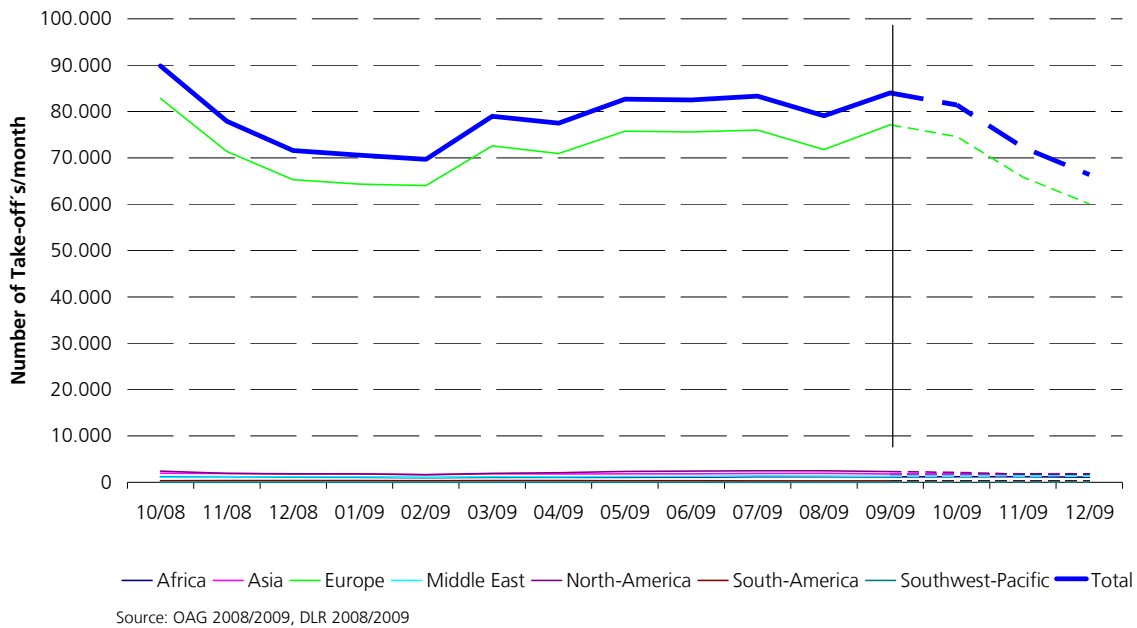


Fig. 3: Development of the German Air Transport Supply

Changes in the German Air Transport Supply

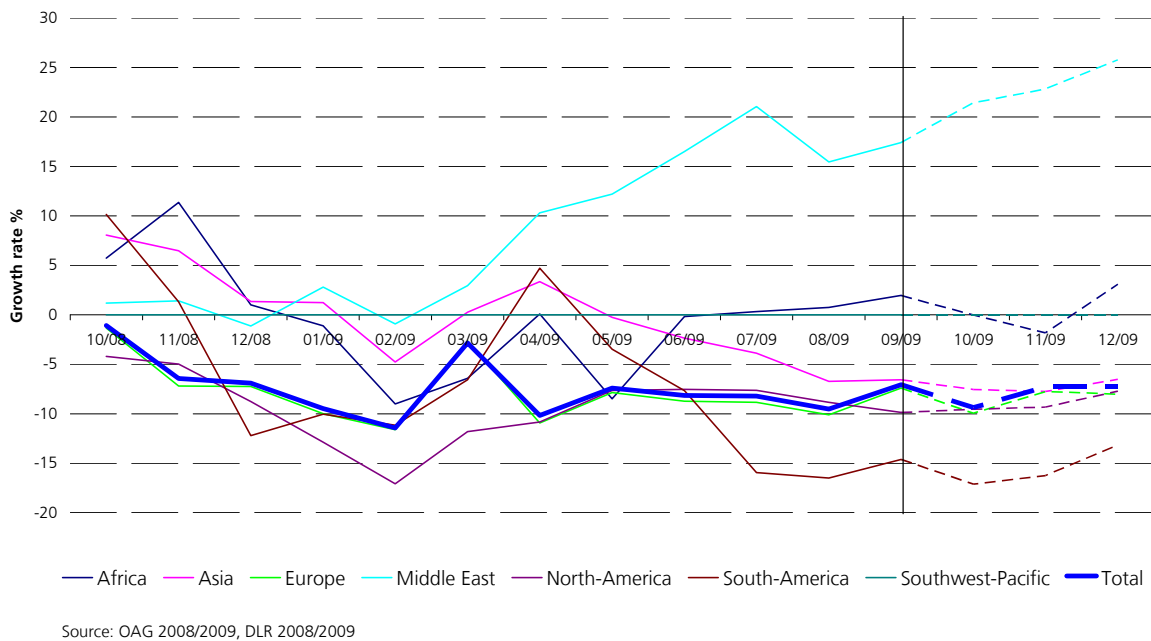


Fig. 4: Changes in the German Air Transport Supply

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