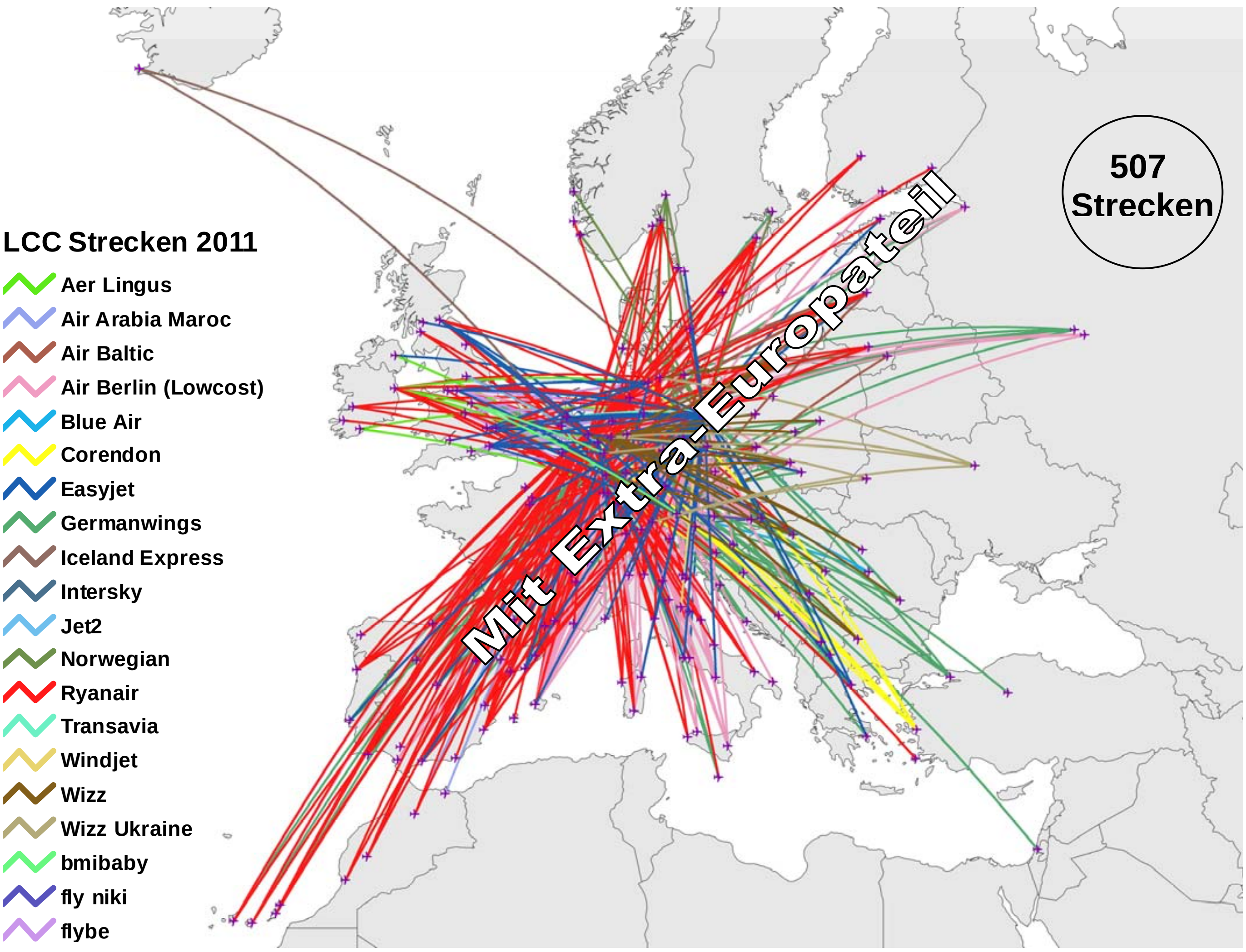
Deutsches Zentrum für Luft- und Raumfahrt e.V. in der Helmholtz-Gemeinschaft

Low Cost Monitor 1/2011

- An Analysis performed by DLR -



The current Low Cost Carrier Market in Germany
Spring 2011

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Since several years the Low Cost Carrier (LCC) market is a substantial part of the German air transport market. The Low Cost Monitor, published DLR, twice a year informs on LCC's essential features and current developments in this market segment, particularly as to the number and relative importance of low cost carriers, their offers including the air fare, and the passenger demand. The offers reflected by the current Monitor are based on one reference week of the winter flight schedule 2011. The passenger traffic indicated relates to the whole year of 2010.

Airlines

- The airlines involved in the Low Cost business design their offers quite differently. Due to this inhomogeneity only a few distinctive criteria can be defined for the Low Cost market segment, such as low fares, across-the-board availability and direct sale via the internet. Thus, in some cases a certain scope of discretion arises when allocating an airline to an LCC-segment. Furthermore, for several airlines amalgamations of business models are seen, which additionally complicate, the accurate allocation of airlines to the Low Cost Market. In this Monitor issue the authors currently identify 20 airlines (of all airlines operating on German airports), completely or partly providing LCC service. These are in detail (see also table 1):

  Aer Lingus (EI) (www.aerlingus.com), Fleet: 34 Flugzeuge (A320: 31, A321: 3)
  Air Arabia Maroc (3O) (www.airarabia.com), Fleet: 4 Aircraft (A320:4)
  Air Baltic (BT) (www.airbaltic.com), Fleet: 35 Aircraft (B737: 17, F50/70: 10, D8: 8)
  Air Berlin (AB) (www.airberlin.com), Fleet: 114 Aircraft (A319/20/21: 50, B737: 64)
  Blue Air (0B) (www.blueair-web.com), Fleet: 8 Aircraft (B737: 8)
  Bmibaby (WW) (www.bmibaby.com), Fleet: 14 Aircraft (B737: 14)
  Corendon (CAI) (www.corendon.com), Fleet: 7 Aircraft (B737: 7)
  Easyjet (U2) (www.easyjet.com), Fleet: 171 Aircraft (A319: 145, A320: 24; B737: 2)
  flybe (BE) (www.flybe.com), Fleet: 69 Aircraft (D8: 55, E: 14)
  Germanwings (4U) (www.germanwings.com), Fleet: 30 Aircraft (A319: 30)
  Iceland Express (5W) (www.icelandexpress.com), Fleet: 2 Aircraft (B737: 2)
  Intersky (3L) (www.intersky.biz), Fleet: 5 Aircraft (D8: 4, ATR:1)
  Jet 2 (LS) (www.jet2.com), Fleet: 36 Aircraft (B737-300: 25, B757-200: 11)
  Niki (HG) (www.flyniki.com), Fleet: 21 Aircraft (A319: 2, A320: 10 A321: 3, E:6)
  Norwegian (DY) (www.norwegian.no), Fleet: 56 Aircraft (B737: 56)
  Ryanair (FR) (www.ryanair.com), Fleet: 263 Aircraft (B737: 263)
  Transavia (HV) (www.transavia.com), Fleet: 19 Aircraft (B737: 19)
  Windjet (IV) (www.windjet.it), Fleet: 11 Aircraft (A319: 4, A320: 7)
  Wizz (W6) (www.wizzair.com), Fleet: 30 Aircraft (A320: 30)
  Wizz Ukraine (WU) (www.wizzair.com), Fleet: 2 Aircraft (A320:2)

  (A: Airbus, B: Boeing, C: Canadair, D: Dash, E: Embraer, F: Fokker, MD: B/McDonnell, S: Saab)

  Flights offered by *CONDOR* or *LTU* are not considered in this analysis, since these airlines indeed also offer several low-cost-flights, but the distinct allocation to the Low Cost sector is considered to be difficult, since only selected flights can be booked directly and with low fares. This contradicts the actual Low Cost Carrier concept of booking the majority of flights online and of pricing according to the booking period, respectively the day of travel. In a broad sense, also *Lufthansa* flights of the „Better-Fly"-segment have to be considered, but also here no distinct allocation can be made. The airline *Air Berlin*, who are running several business models, can be allocated to a gray zone. For this former charter airline, who are early actors in the Low Carrier Market by launching the segment „Cityshuttle", the identification of Low Cost routes has become much more complicated due to the mergers with *DBA*, *Gexx* and *LTU* as well as the cooperation with *Walter airline* (*LGW*). Thus, only the present Low Cost routes served by these airlines as well as the corresponding ones are considered, however, flights to typical holiday destinations like North Africa or other intercontinental relations are excluded. Air Berlin have newly added the city links previously operated by *TUIfly.* However, some of which have already been ceased again by *Air Berlin*.

  In total, the number of Low Cost Carriers operating in the German market has slightly increased as opposed to the preceding year. Compared to winter 2010 three new airlines have started their service in Germany. Whereas, *Corendon* already had served Germany before the economic crisis in 2008, the British airline *bmibaby* – who up to now mainly had served other European relations – is serving the German market now. *Air Arabia Maroc* is a non-European Low Cost airline providing flight service from Germany.

Most airlines have kept their fleet size relatively constant. Only *Ryanair* show a strong increase of 34 airplanes as opposed to the last year. Thus, *Ryanair* hold a fleet of 263 airplanes, type Boeing 737-800, equipped with about 190 seats each.

- **Carrier Ranking** (s. Table. 1): Measured against the number of flights served (departures) in one week in January 2011 the *Air Berlin* Low Cost segment covering almost 1,900 departures - after having taken over the *TUIfly* city links - is by far the major Low Cost Carrier in Germany. However, the value is by 6% lower than in the preceding year. This is among other reasons due to the fact, that domestic routes from Memmingen, which have been taken over by *TUIfly*, were ceased in 2011. Whereas during the past years until 2008 high yearly growth rates have been achieved in the Low Cost sector, the change already started in summer last year, when the growth rates dropped distinctly and this decline continued until summer 2009. After a further consolidation phase in spring 2010, positive growth rates are seen again for most airlines - a trend which also continued in summer 2010. In early 2011 there is a re-decline of the service supplied (by 1.4%), which is partly due to the implementation of the air traffic tax in Germany on January 1st, 2011. According to the ranking *Germanwings* (728 flights) and *Ryanair* (624 flights) follow. For this first time, *Ryanair* do not continue their previous growth policy in Germany, i. e. to continuously increase the number of flights as opposed to the preceding year even during the entire crisis, whereas almost all other Low Cost Carriers have reduced their services during this period. All domestic relations served by *Ryanair* have been ceased in March 2011. Also here, one of the reasons is the implementation of the German air traffic tax. After a period of rigid reductions major re-growth is seen for *Easyjet*, which is due to the considerable extension of service in Berlin as well as the extensions in Duesseldorf and Hamburg and the new service in Dresden. The British airlines *flybe* and *Intersky* follow on places 5 and 6. Whereas *Intersky* have slightly reduced their frequencies, *flybe* report a moderate growth. The flights performed by all other Low Cost Carriers distinctly amount to less than 100 flights per week.

- **LCC Market Shares** (s. Fig. 1): The six major of 19 Low Cost Carriers currently cover roundly 93% of the German market. Just *Air Berlin* cover roundly 46% of all flights. In the market share ranking list they are followed by *Germanwings* (18%), *Ryanair* (15%.) *Easyjet* have been able to raise their share to 9% by extending their service.

Transport Services

- **Routes** (s. Tables 1 and 2 as well as Fig. 2): In total, the Low Cost airlines considered covered 507 different domestic and cross border routes in one week in January 2011. These are roundly 10 routes more than in winter 2010, which equals a growth rate of more than 2%. Thus, after having abandoned routes in 2009 and a major growth in last year again a slight growth of route development is seen. Whereas, during the last summer period the pre-crisis level has been considerably exceeded by strong growth, in the winter flight schedule 2011 the peak of 2008 was only scarcely exceeded. As opposed to this the number of flights compared with the preceding year is again reducing (-1.4%), which according to various airlines is also due to the new air traffic tax. Whereas, since the emergence of the Low Cost market roundly 9 years ago almost 100 routes have been added yearly, in summer 2008 a crisis of the world economy and of air transport was already looming when only about 50 routes have been additionally covered by LCC's. In spring 2009, for the first time, a decline was seen as opposed to the reference period, but already in summer 2009 again a positive growth of routes was seen, which continued in spring 2010 and arrived at a new peak in summer 2010 (more than 7%). Thus, the financial and economic crises – some companies did better than others - seem to have stopped, but the implementation of the new air traffic tax implies a new curbing effect. Whereas some small airlines have left the market, *Ryanair* have extended their network of routes during this period – in spring 2008 (94 routes), in spring 2009 (118 routes) and in spring 2010 (129 routes) by additional 35 routes in total. Here, in particular the airports Niederrhein, Berlin-Schoenefeld, Bremen and Memmingen have been involved, since *Ryanair* have mainly extended their network of routes on these airports. Although *Ryanair* are still extending their routes in this spring, they for the first time reduce their flight service by 6%. The airports Hahn and Luebeck, where roundly 20 flights per week have been ceased, are particularly affected. The airports Altenburg and Friedrichshafen are not served anymore. Whereas, *Air Berlin* have been able to considerably extend their service in Cologne and Stuttgart by taking over the *TUIfly*-routes, in Cologne numerous routes have been abandoned this year and flight service was reduced by more than 40 flights per week. The airport Memmingen is not served anymore. Also *Germanwings* have distinctly reduced the routes served, thereby the flights shifted from Hamburg airport to Hanover airport, the airports Zweibruecken and Friedrichshafen are not served anymore. However, *Easyjet* extend their network of routes by 25% and thus exceed the values of 2008. For domestic flight routes the double counting (outward MUC-DUS and return DUS-MUC) should be taken into account.

- After *Air Berlin*, *TUIfly*, *Germanwings*, *Ryanair* and *Intersky* had started to serve more domestic routes in the years before, in the current year – in contrast to the general growth of routes – for the domestic routes a decline by roundly 9% as opposed to the preceding year is seen. There were no new service priorities in the last year, however, there is a further network extension to East Europe and Greece is increasingly served. This trend will also continue during the months of summer, since airport fees are not levied in Greece for a certain period. *Ryanair* too will take advantage of this fact and will start flight service to destinations in Greece for the first time.

- After having retired from the airport Altenburg-Nobitz end of March 2011, *Ryanair* have newly added the airport Magdeburg-Cochsted to their network, where initially 4 destinations in Spain are offered. In summary, in Europe some destinations in central and East European countries have been newly added to the networks, others were deleted, but also the border to Near East and North Africa is crossed more frequently. Thus, for the first time, also flights to Israel are offered in winter. As already noticed several times: During the months of winter typical warm water regions like Spain or Italy are less frequented than countries holding winter sports options such as Austria.

- **Competition:** Direct competition among carriers in the Low Cost range has further decreased, only on 13 (2.5%) of the total number of 507 routes two airlines are competing. There are no routes served by more than 2 airlines. 494 routes - the major part - are served by a single airline.

- **Flights** (s. Table 1): In total barely 4.100 flights have been performed by Low Cost Carriers in one week in January 2011, sixty flights less than in the preceding year. Thus, the number of flights has decreased by 1.4%, likewise the number of seats has decreased by 2.5%, whereas, the number of routes has been raised by 2.5%. This means the network has been slightly extended while the frequency simultaneously has been reduced.

- **Seats** (s. Table 1): On 4,096 flights on average 155 seats have been made available per flight, a similar value like in the preceding year. Obviously, for Low Cost Carriers a typical average scale airplane carrying roundly 150 seats has established. Thus, these flight-specific seat capacities continue ranking distinctly higher than those of traditional European scheduled airlines. When considering the fleet composition of the individual airlines the tendency of disposing small scale aircraft is revealed. Typical airplanes are Airbus 320 and Boeing 737. Only a few airlines, such as *Intersky* or *Flybe* are holding small scale propeller-driven airplanes in their fleet.

- **Destinations** (s. Table 2): The country of destination ranking reveals the big market share of domestic traffic: In this market roundly 45% of all Low Cost Carrier flights departing from German airports are offered in this market, which only makes up 21% of all routes (roundly 100 routes corresponding to 50 airport pairs). These are 3 percent points less than in the preceding year. During the months of winter Great Britain and Italy rank as numbers 2 and 3 (roundly 490 respectively 305 flights) Spain ranks ahead of Austria and Switzerland on place 4. Then on the places 7 to 9 Ireland, Sweden and Russia follow ahead of Poland and Norway. In particular within Germany and to Austria, Ireland and Poland a decline of Low Cost services is seen as opposed to the preceding year, whereas almost all other countries show partly two-digit growth rates. This is among other reasons due to administrative reasons such as a more rigid charging policy, since Germany, Ireland and Austria have implemented or raised an air traffic tax, which made several companies reduce their services in these markets. In total, in Germany Low Cost Carriers currently serve destinations located in 34 countries. As opposed to the preceding year Estonia and Israel are newcomers. The flight service to Slovakia was ceased.

- **Airports** (s. Fig. 3): The most frequented German airport – Frankfurt – continues playing a minor role in the Low Cost segment, due to its distinct hub function in traditional scheduled airline traffic and the already high utilisation of airport capacity. Thus, only 126 flights or roundly 3.1% have been performed mainly by *Air Berlin* and *flybe* as Low Cost flights. Cologne/Bonn shows a roundly 10% lower value (440 departures which correspond to almost 62% of the total local flight traffic) than in the preceding year and is only number 3 in the airport ranking offering the highest number of Low Cost flights, behind the Berlin airports Schoenefeld and Tegel. Whereas the Low Cost percentage of Schoenefeld amounts to roundly 86%, the one of Tegel only amounts to 35%. Low Cost traffic has considerably grown at Hanover airport, where the percentage could be raised by more than 40% to 152 in this year. Further growth is also seen at the airports Schoenefeld and Niederrhein. However, distinctly decreasing is Low Cost traffic at the airports Luebeck, Memmingen, Hahn, Hamburg and Cologne. There, the number of Low Cost flights for example in Luebeck dropped by more than 40%. A loss to this extent is particularly serious for airports holding a high Low Cost percentage. With a more than 90% share of scheduled airline traffic, the airports Niederrhein, Luebeck, Dortmund, Memmingen, Karlsruhe/Baden-Baden and Hahn almost exclusively participate in Low Cost Carrier traffic. The same is true – to a less extreme extent – for the airport Berlin-Schoenefeld.

Air Fares

- **Average Fares** The air fares offered by the major Low Cost Carriers in Germany, are considerably varying related to destination and booking period. The prices quoted by the Carriers are often net prices, which normally do not include any fees, taxes or other charges and thus are not meaningful. In order to allow for statements on final prices, the prices for LCC flights on 65 selected routes – this corresponds to a representative random sample of 10% of all LCC routes covered in spring 2011 - have been assessed for 4 different points of time (booking period of one day, one week, one month and three months). The constant route sample allows for a comparison with the results of the preceding analysis. The currently chosen booking date is April 4th, 2011.

  In spring 2011, the average fares determined in this way for one route vary depending on the carrier between approx. 31 € and 67 € (net prices) and between 46 € and 110 € (gros prices). The difference between net and gros prices amounts to Euro 3 in the best case and to Euro 66 in the worst case. Meanwhile, many airlines do not quote net prices anymore.
  In spring - like every year - the average fares rise as opposed to autumn. Whereas the average fares of the Low Cost Carriers have slightly climbed, those of the more expensive carriers have dropped, hence, the price span has slightly approached. Only *Wizzair* have considerably raised the air fares analysed.

- **Average Prices related to Booking Period** Low Cost Carrier air fares considerably vary according to the period between booking and flight: A trip, starting the next day, often costs four- to tenfold of a trip to be started in 3 months. However, this span is not considered to be as distinct as formerly. The average gros prices quoted by the major Low Cost Carriers vary between approx.
- 68 € and more than 170 € for a flight with a booking period of only one day and between 21 € and 62 € for a flight to be started 3 months after the day of booking. Most of the cheapest flights with a long booking period only cost up to about 50 €, but often climb to values of more than 100 €, if the flight is to be started on the next day. However, these values do not refer to the number of tickets actually sold at these prices, since there is no firm information on the quantity of seats sold at the respective tariff.

- A detailed analysis of Low Cost Carrier air fares in Germany can be found on the DLR website (www.dlr.de/fw).

Passenger Demand

On 26 international and regional airports in total 190.5 passengers were counted. Thereof 65.2 million boarding and de-boarding passengers are to be allocated to the Low Cost service segment (s. Table 3). This corresponds to a percentage of 34.2%. This percentage considerably varies for the individual airports. For the hub-airport Frankfurt the LCC-percentage is the lowest (4%), whereas the "Low Cost Airports" Hahn, Luebeck and Niederrhein almost exclusively feature this traffic segment. Also the airports Berlin-Schoenefeld, Cologne/Bonn, Dortmund, Bremen, Karlsruhe/Baden-Baden, Memmingen, Friedrichshafen and Rostock/Laage mainly feature these Low Cost services.

After the traffic decline in 2008/09 when the financial and economic crises had made inroads, air traffic has recovered in the last year. In 2010 passenger traffic has grown by 4.7% as opposed to the preceding year. Since for demand survey purposes as to Low Cost traffic for the first time MIDT-data supplied by Sabre have been applied, which are not necessarily compatible with those data which have been supplied by the airlines in former years, a statement as to passenger growth can only be made to a limited extent for this segment. When combing the data sources available for the demand and supply area, a stronger growth of Low Cost traffic than the total supply and thus an increase of the passenger traffic percentage of Low Cost flights is revealed in the preceding year. It can be assumed, that the demand for Low Cost services has increased by about 6-10% in Germany in 2010/09.

- Referred to the origin domestic demand (disregarding transfer traffic) LCC's show big market shares of domestic traffic (s. Table 4) on most airports apart from Frankfurt, Bremen and

Paderborn. In total, almost each second passenger is carried by Low Cost Carriers on domestic flights. However, at the airports Berlin-Schoenefeld, Memmingen, Karlsruhe/Baden-Baden, Hahn, Dortmund, Niederrhein and Zweibruecken almost the entire demand is covered by Low Cost services. Although the LCC percentage only amounts to 42% at Munich airport, this airport shows the highest passenger traffic in the Low Cost area (4 million passengers), followed by the airports Berlin-Tegel (3.4 million), Hamburg (2.7 million), Cologne/Bonn (2.6 million) and Duesseldorf (2.3 million)

The current Low Cost Carrier Market in Europe

Besides the detailed analysis of the German Low Cost Carrier market, also the main features of the European LCC-market are described here. In addition to the airlines operating in the German market, further airlines can be allocated to the Low Cost Carrier market. However, the number of those airlines is increasing, who are involved in the traditional network or charter business as well as in the pure Low Cost segment (such as *Air Berlin* in Germany). Hence, the distinction between traditional network carriers, holiday airlines and Low Cost Carriers becomes even more complicated. Consequently, this analysis cannot be considered to be complete, but is intended to approximately inform on the extent and structure of the European Low Cost market. Besides the airlines operating in the German market the following are actors in the European market:

Air Italy (I9) (www.airitaly.it), Fleet: 13 Aircraft (B737: 9, B767:4)
AviaNova(AO) (www.avianova.com), Fleet: 5 Aircraft (A320:5)
Blu Express(BV) (www.blu-express.com), Fleet: 3 Aircraft (B737: 3)
Flybaboo (F7) (www.flybaboo.com), Fleet: 5 Aircraft (D8: 2, E190: 3)
Jet4you (8J) (www.jet4you.com), Fleet: 6 Aircraft (B737: 6)
Meridiana (IG) (www.meridiana.com), Fleet: 34 Aircraft (A319: 4, A320: 12, MD82/83: 17, ATR: 1)
Skyexpress (skyexpress.ru), Fleet: 9 Aircraft (B737: 9)
Transavia France (TO) (www.transavia.com), Fleet: 7 Aircraft (B737: 7)
Transavia Denmark (PH) (www.transavia.com), Fleet: 3 Aircraft (B737:3)
Volare (VA) (www.volareweb.com), Fleet: 1 Aircraft (A320: 1)
Vueling (VY)(www.vueling.com), Fleet: 37 Aircraft (A320: 737)
Wizz Bulgaria (8Z) (www.wizzair.com), Fleet: 3 Aircraft (A320: 3)

To an increasing extent also non-European Low Cost Carriers serving Europe are crowding the market. These are among others:

Air Asia X (D7) (www.airasia.com), Fleet: 8 Aircraft (A330:6, A340:2)
Flydubai (FZ) (www.flydubai.com), Fleet: 9 Aircraft (B737:9)

The major European Low Cost airline is *Ryanair* (7,700 departures in the winter period in January 2011), (s. Tab. 5), they have barely exceeded the January values of last year and have been able – like some other major European Low Cost Carriers – to further extend their services. Second major airline is *Easyjet* (roundly 6,600 departures), who Europe-wide offer almost 15% more flights than in the preceding year. Whereas, *Ryanair* have added roundly 200 new citypairs, *Easyjet* have added 120, hence significantly more than in the preceding year. At a big distance follow the airlines *Air Berlin* and *flybe* (about 2,800 departures each per week. Then there is a big gap again. *Norwegian*, *Aer Lingus*, *Vueling*, *Wizz* and *Germanwings* follow with a number of flights between 1,000 and 2,000. Whereas *Wizz* too have considerably extended their service, the one of *Vueling* remained almost constant. Thus, the consolidation in the Low Cost Carrier range is continuing. Whereas airlines such as *Clickair* have been integrated into a major Low Cost Carrier such as *Vueling*, others such as *Air Italy* have been taken over by former national carriers such as *Alitalia*, others such as *Sky Europe* had to file for bankruptcy. As opposed to this there is a group of airlines such as *Ryanair*, who are permanently expanding until now. Numerous airlines, who have reduced their services in 2009 - the year of crisis – now show first growth tendencies, which are also continued in 2011. Thus, on European level – unlike in Germany – a positive growth of the number of flights (3.4%) compared with the period monitored in 2010. As opposed to this a decline of 1.4% is seen in Germany. Also the percentage of growth as to the routes covered is higher than in Germany (7.6% Europe, 2.4% Germany). The reason is the already frequently mentioned implementation of the air traffic tax in Germany since 1st January 2011 and the subsequent shifting or ceasing of flights in Germany. Similar tendencies are seen in Ireland, where in March 2009 an air traffic tax has been implemented. Here, the number of flights dropped by 16% from 1,580 in January 2009 to 1,383 in 2010 and is stagnating on this level since then.

Great Britain again is number 1 according to the LCC flight destination ranking (s. Tab. 6). the British network covers more than 800 routes all over Europe, including the domestic traffic. Also here since 2009 a yearly decrease of flights and routes as opposed to the preceding year is seen, which is also probably due to the raised air traffic tax levied. The number of flights dropped from roundly 7,750 via 7,690 to currently 7,500 in the period monitored. Italy, Spain and Germany (4,000 flights each) follow on the next places. France, Norway and Ireland rank on places 5 to 7 (more than 1,000 flights each). Barely 3,600 (80%) of the total amount of 4,500 routes are served by a single Low Cost Carrier. Only on roundly 652 routes 2 LCC's are operating and on 237 routes more than 2 Low Cost Carriers are competing. Hence, the number of routes, where direct competition is seen has increased since last year.

Due to the strong route extension by *Easyjet*, London-Gatwick is the major European Low Cost Carrier airport now (1,175 LCC departures per week in January 2011) (s. Fig. 4). The airports London-Stansted (1,027 departures), Dublin (1,012 departures) and Barcelona (1,012 departures) follow immediately. The third London airport – Luton – is number 12 (500 departures). In total from London airports more than 2,700 Low Cost flights are provided. This figure is not topped by any other European agglomeration. Berlin-Schoenefeld rank on place 14 ahead of Berlin-Tegel (454). Among the 30 major Low Cost Carrier airports in Europe range Cologne (place 17), Duesseldorf (place 19) and Munich (place 23) and other German airports, where Low Cost Carriers serve more than 350 flights per week. Hamburg and Stuttgart are not listed anymore. When looking at the ranking of German airports providing Low Cost service it becomes obvious that Cologne has worsen and Berlin-Schoenefeld has improved compared with winter 2010.

For the first time the Low Cost Carrier market share of the European flight traffic has decreased from 26% to 24% (see. Fig. 5). 76% of the flights are mainly performed by traditional scheduled and holiday airlines. Another part of the market is served by smaller regional airlines, which mostly cooperate with a big airline.

Low Cost Carrier Market in Germany										
		01/2011			01/2010			Change (%)		
Rank	**Airline**	**Departures**	**Seats**	**Routes***	**Departures**	**Seats**	**Routes***	**Departures**	**Seats**	**Routes***
1	Air Berlin (Low Cost Segment)	1.886	290.045	163	2.007	314.527	178	-6,0	-7,8	-8,4
2	Germanwings	728	109.174	82	755	113.250	89	-3,6	-3,6	-7,9
3	Ryanair	624	117.936	139	661	124.929	129	-5,6	-5,6	7,8
4	Easyjet	374	58.744	47	250	38.982	37	49,6	50,7	27,0
5	flybe	113	8.630	12	109	8.284	12	3,7	4,2	0,0
6	Intersky	92	4.968	10	100	5.400	13	-8,0	-8,0	-23,1
7	Wizz	62	11.160	19	57	10.260	15	8,8	8,8	26,7
8	Aer Lingus	54	9.396	6	60	10.440	8	-10,0	-10,0	-25,0
9	Air Baltic	45	4.032	6	51	6.596	7	-11,8	-38,9	-14,3
10	Norwegian	32	5.270	7	32	5.050	7	0,0	4,4	0,0
11	fly Niki	32	4.246	4	33	4.680	5	-3,0	-9,3	-20,0
12	Wizz (Ukraine)	17	3.060	6	12	2.160	4	41,7	41,7	50,0
13	Corendon	7	1.110	7	0	0	0	100,0	100,0	100,0
14	bmybaby	7	985	2	0	0	0	100,0	100,0	100,0
15	Jet2	6	888	1	6	888	1	0,0	0,0	0,0
16	Transavia	5	610	2	14	1.736	4	-64,3	-64,9	-50,0
17	Blue Air	4	606	2	4	492	1	0,0	23,2	100,0
18	Air Arabia Maroc	3	450	2	0	0	0	100,0	100,0	100,0
19	Iceland Express	3	447	2	3	444	2	0,0	0,7	0,0
20	Windjet	2	360	1	2	360	1	0,0	0,0	0,0
		4,096	**632,117**	**520**	**4,156**	**648,478**	**513**	**-1.4**	**-2.5**	**1,4**

Table 1: **Low Cost Carrier Ranking according to the number of flights performed (during one week in January 2011; domestic routes are counted twice, within Europe only in one direction)**

*Routes served by several carriers are counted twice.

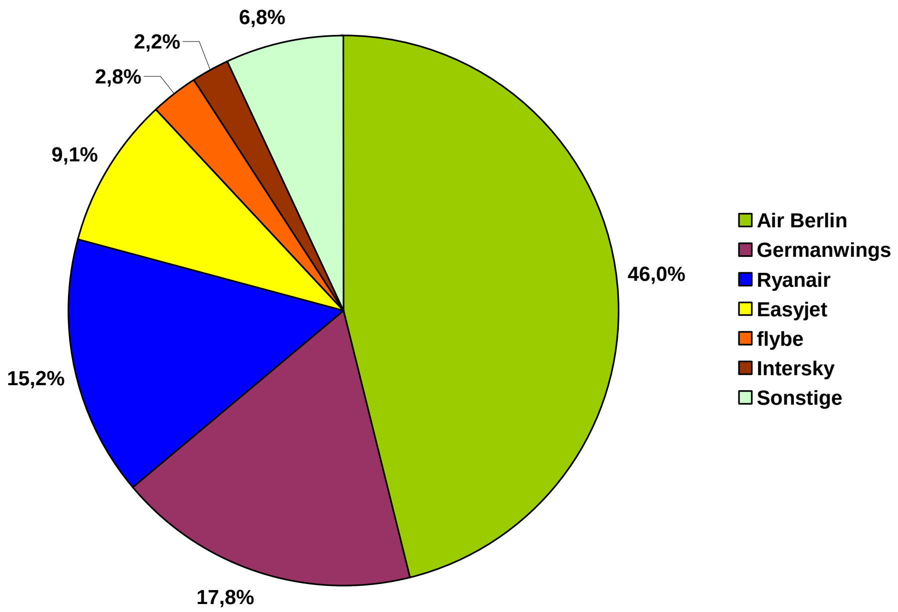

Figure 1: **Low Cost Carrier Market Share in Germany (according to number of flights performed during one week in January 2011)**

Low Cost Carrier Market in Germany										
		01/2011			01/2010			Change (%)		
Rank	**Destination**	**Departures**	**Seats**	**Routes**	**Departures**	**Seats**	**Routes**	**Departures**	**Seats**	**Routes**
1	Germany	1.849	279.640	107	2.024	307.840	114	-8,6	-9,2	-6,1
2	Great Britain	487	69.075	55	480	69.243	52	1,5	-0,2	5,8
3	Italy	305	49.588	67	261	44.375	65	16,9	11,7	3,1
4	Spain	300	53.230	66	272	49.364	62	10,3	7,8	6,5
5	Austria	285	39.612	30	294	43.338	30	-3,1	-8,6	0,0
6	Schweiz	137	21.646	10	117	17.952	9	17,1	20,6	11,1
7	Ireland	74	13.176	9	76	13.689	11	-2,6	-3,7	-18,2
8	Sweden	64	10.895	15	76	13.369	15	-15,8	-18,5	0,0
9	Russia	62	10.512	9	57	9.508	9	8,8	10,6	0,0
10	Poland	61	10.629	18	86	14.618	24	-29,1	-27,3	-25,0
11	Norway	61	10.503	13	51	8.465	12	19,6	24,1	8,3
12	France	60	9.181	10	56	8.356	9	7,1	9,9	11,1
13	Latvia	53	5.659	8	54	7.646	8	-1,9	-26,0	0,0
14	Denmark	33	5.064	4	26	4.080	3	26,9	24,1	33,3
15	Portugal	31	5.559	10	25	4.497	8	24,0	23,6	25,0
16	Hungary	26	4.040	6	22	3.382	5	18,2	19,5	20,0
17	Romania	24	3.966	8	21	3.312	7	14,3	19,7	14,3
18	Finland	24	4.132	5	23	3.769	4	4,3	9,6	25,0
19	Morocco	19	3.474	8	13	2.457	5	46,2	41,4	60,0
20	Ukraine	17	3.060	6	15	2.610	4	13,3	17,2	50,0
21	Serbia	17	2642	8	17	2598	10	0,0	1,7	-20,0
22	Netherlands	17	2.482	3	5	624	2	240,0	297,8	50,0
23	Greece	17	2.673	6	12	1.827	5	41,7	46,3	20,0
24	Croatia	16	2.400	5	18	2.700	6	-11,1	-11,1	-16,7
25	Belgium	13	2.028	1	7	1.092	1	85,7	85,7	0,0
26	Lithuania	12	2.153	4	14	2.163	4	-14,3	-0,5	0,0
27	Bulgaria	9	1.530	3	7	1.170	2	28,6	30,8	50,0
28	Turkey	7	1.054	7	3	450	1,0	133,3	134,2	600
29	Czechia	6	900	1	11	1.806	2	-45,5	-50,2	-50,0
30	Iceland	3	447	2	3	444	2	0,0	0,7	0,0
31	Estonia	3	567	1	0	0	0	100,0	100,0	100,0
32	Israel	2	300	1	0	0	0	100,0	100,0	100,0
33	Bosnia	2	300	1	4	600	2	-50,0	-50,0	-50,0
34	Slovakia	0	0	0	6	1.134	2	-100,0	-100,0	-100,0
	Total	**4,096**	**632,117**	**507**	**4,156**	**648,478**	**495**	**-1.4**	**-2.5**	**2,4**

Table 2: **Country of Destination Ranking according to Number of Flights (data are valid for one week in January; within Germany both directions of one route are considered)**

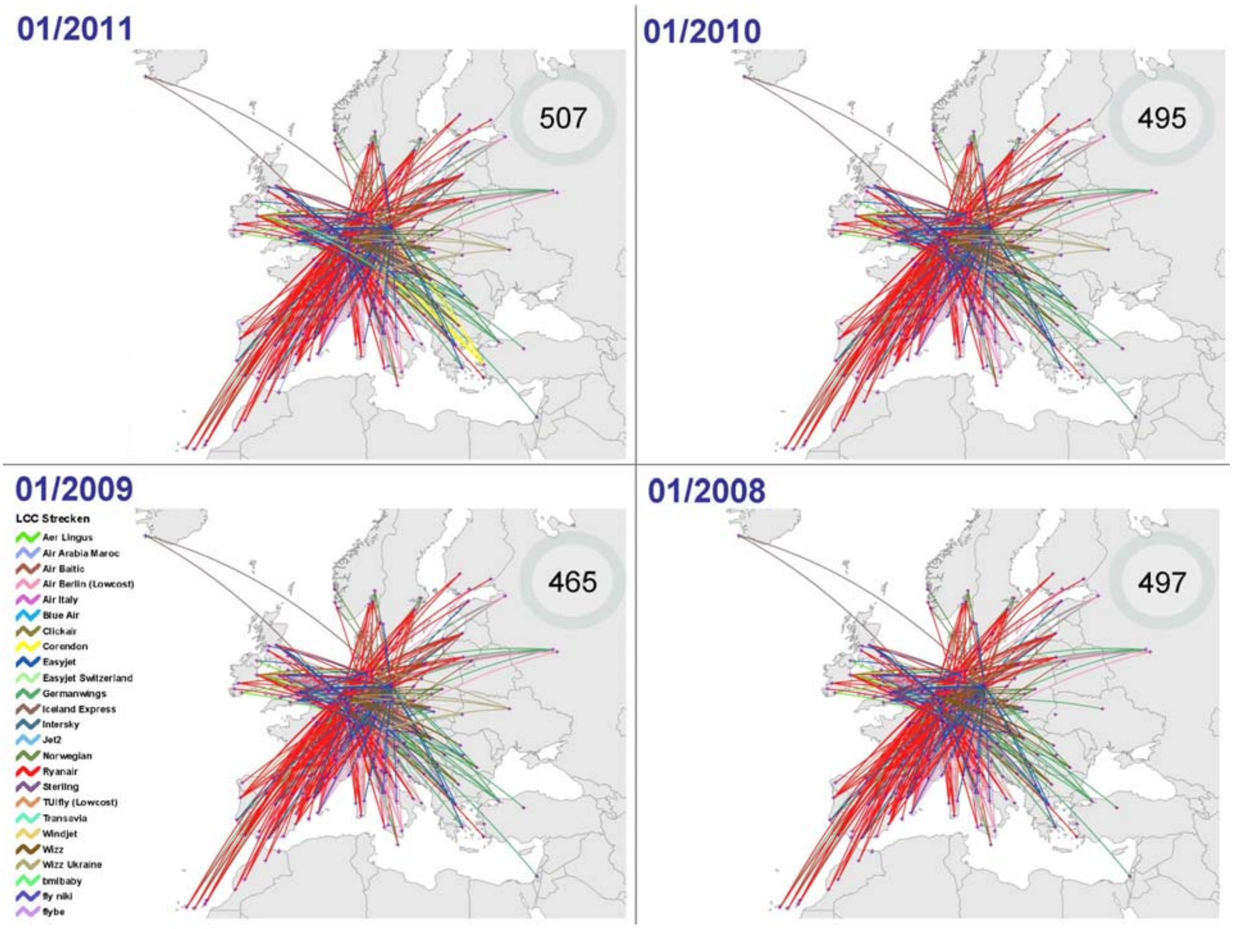

Figure 2: **Development of the LCC Route Network of German Airports**

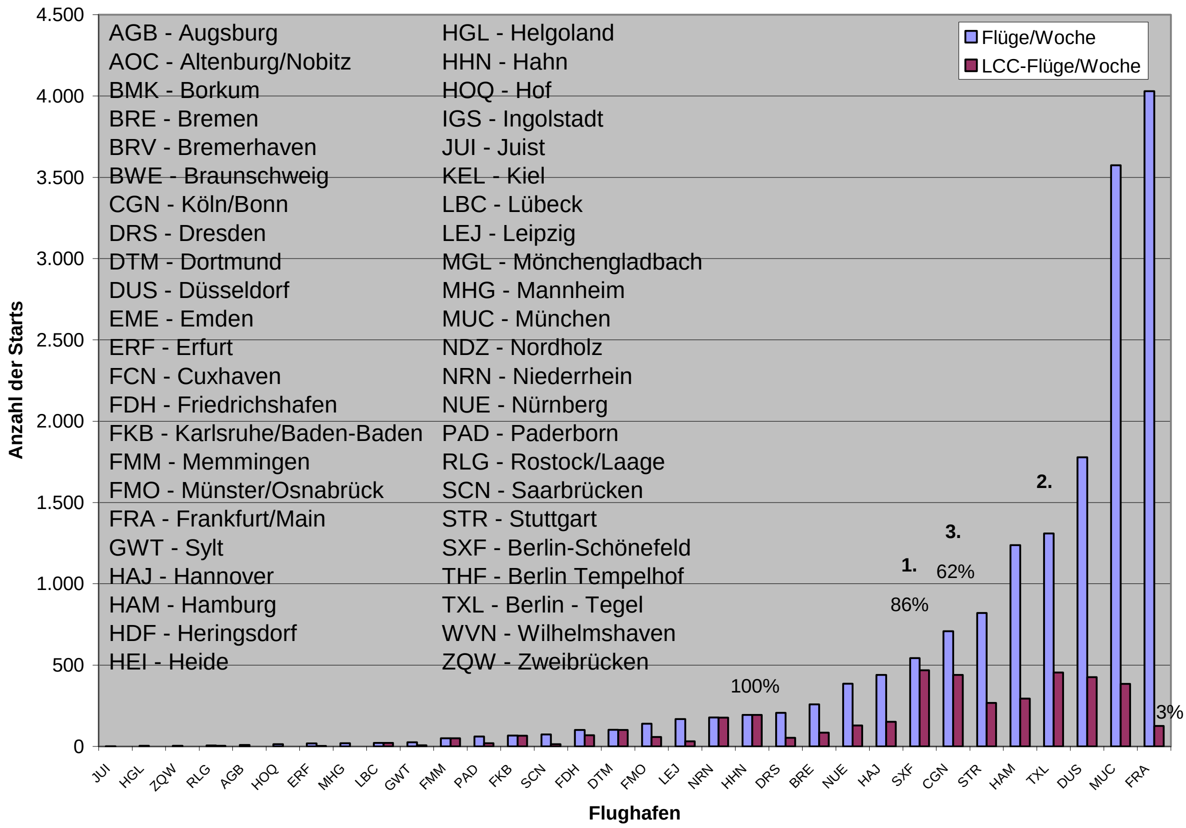

Figure 3: **Passenger carrying Flights on German Airports per week in January 2011**

Low Cost Carrier Market in Germany			
Airport	Pax 2010 (in thousand)		Percentage % LCC of total
	Total	LCC	
DUS	18.943,7	7.179,0	37,9
CGN	9.806,3	7.086,5	72,3
TXL	14.991,1	7.044,9	47,0
SXF	7.270,0	6.107,6	84,0
MUC	34.598,6	6.079,3	17,6
HAM	12.918,3	5.166,7	40,0
STR	9.162,2	4.296,7	46,9
HHN	3.463,6	3.456,4	99,8
NRN	2.889,7	2.814,3	97,4
HAJ	5.016,9	2.184,9	43,6
NUE	4.034,1	2.164,2	53,6
FRA	52.710,2	1.891,7	3,6
DTM	1.740,6	1.656,6	95,2
BRE	2.663,9	1.631,1	61,2
FKB	1.168,4	1.098,9	94,1
FMM	906,5	862,8	95,2
FMO	1.312,7	823,9	62,8
DRS	1.803,5	789,5	43,8
LEJ	1.847,2	642,2	34,8
PAD	1.008,0	634,3	62,9
LBC	537,6	531,8	98,9
FDH	581,4	443,2	76,2
ERF	309,8	164,7	53,2
SCN	420,1	164,3	39,1
ZQW	246,9	132,1	53,5
RLG	162,5	128,9	79,3
Total	**190,513.7**	**65,176.6**	**34.2**

Table 3: **Low Cost Passenger Traffic according to Airports and Portion of Total in 2010 (References: ADV, Sabre, DLR)**

Low Cost Carrier Market in Germany		
Airport	**LCC Passengers on German Domestic Flights in 2010 (in thousand)**	**LCC Portion of Original German Domestic Traffic**
MUC	3.911	41,9
TXL	3.398	50,5
HAM	2.694	48,2
CGN	2.583	73,3
DUS	2.277	51,8
STR	1.819	62,7
SXF	1.412	98,2
NUE	857	56,2
FRA	680	10,9
DRS	518	44,4
HAJ	504	43,0
FMM	485	99,2
FKB	296	99,5
HHN	254	99,6
LEJ	251	36,7
BRE	238	26,7
FDH	206	78,5
DTM	189	99,8
NRN	165	99,9
FMO	117	47,9
ZQW	101	91,5
SCN	94	48,7
RLG	69	89,8
PAD	41	25,8
ERF	27	63,3
LBC	9	100,0
Total	**23,430**	**48.7**

Table 4: **LCC Passengers on German Domestic Flights according to Airports and LCC-Portion in 2010 (References: ADV, Sabre, DLR)**

Low Cost Carrier Market in Europe				
		01/ 2011		
Rank	Airline	Departures	Seats	Routes
1	Ryanair	7.695	1.454.355	1.593
2	Easyjet	6.630	1.050.628	779
3	Air Berlin Euro Shuttle	2.825	439.212	312
4	flybe	2.793	206.796	251
5	Norwegian	1.970	322.505	281
6	Aer Lingus	1.400	220.600	137
7	Vueling	1.291	232.380	123
8	Wizz	1.180	212.400	332
9	Germanwings	1.032	154.748	137
10	Air Baltic	913	80.878	121
11	Meridiana	812	119.418	122
12	Windjet	403	65.852	50
13	Transavia	361	50.890	88
14	fly Niki	348	52.936	59
15	bmybaby	324	47.170	58
16	Sky Express	245	29.400	21
17	Blue Air	233	39.212	21
18	Volareweb	226	30.756	26
19	Jet 2	190	29.828	70
20	Blu Express	160	23.752	44
21	Air Italy	154	23.544	29
22	Intersky	108	5.832	12
23	Transavia.France	90	16.668	26
24	flybaboo	82	6.068	16
25	Wizz Ukraine	68	12.240	22
26	Corendon	66	10.753	47
27	jet4you	65	11.245	18
28	AviaNova	62	9.300	14
29	Air Arabia Maroc	54	8.100	20
30	Iceland Express	44	6.511	18
31	Transavia Denmark	10	1.732	8
32	AirAsiaX	9	2.160	1
33	flydubai	8	1.440	3
34	Wizz Bulgaria	6	1.080	2
	Total	**31,857**	**4,980,389**	**4,861**

Table 5: **Ranking of Low Cost Carriers operating in Europe according to number of departures (01/2011) (values are valid for one week in January 2011; both directions of one route are considered)**

Low Cost Carrier Market in Europe				
			01/2011	
Rank	Country	Departures	Seats	Routes
1	GB	7.501	1.007.684	824
2	IT	4.689	780.491	666
3	ES	4.244	757.089	659
4	DE	4.096	632.117	507
5	FR	1.748	286.215	299
6	NO	1.348	223.207	159
7	IE	1.342	230.948	143
8	CH	817	125.539	100
9	NL	703	110.393	110
10	AT	564	81.645	90
11	SE	542	89.291	96
12	PL	514	92.009	151
13	PT	486	83.831	88
14	LV	471	48.310	64
15	BE	454	80.042	75
16	RU	436	57.652	52
17	DK	386	60.510	56
18	RO	281	46.738	65
19	FI	184	22.124	38
20	HU	152	25.892	32
21	CZ	137	22.953	30
22	LT	137	16.800	27
23	EE	83	8.642	12
24	TR	77	12.328	36
25	BG	72	12.204	22
26	GR	66	10.713	17
27	MT	63	11.352	24
28	SK	55	10.395	14
29	UA	48	8.242	14
30	RS	42	6.485	17
31	CY	35	6.165	10
32	HR	23	3.564	7
33	IS	21	3.129	7
34	MD	9	1.218	3
35	SI	8	1.248	2
36	GI	7	1.092	1
37	BY	4	184	1
38	GE	4	568	1
39	AM	3	540	1
40	AZ	3	540	1
41	BA	2	300	1
	Total	**31,857**	**4,980,389**	**4,522**

Table 6: **European Country Ranking according to number of departures) (values are valid for one week in January 2010; both directions of one route are considered)**

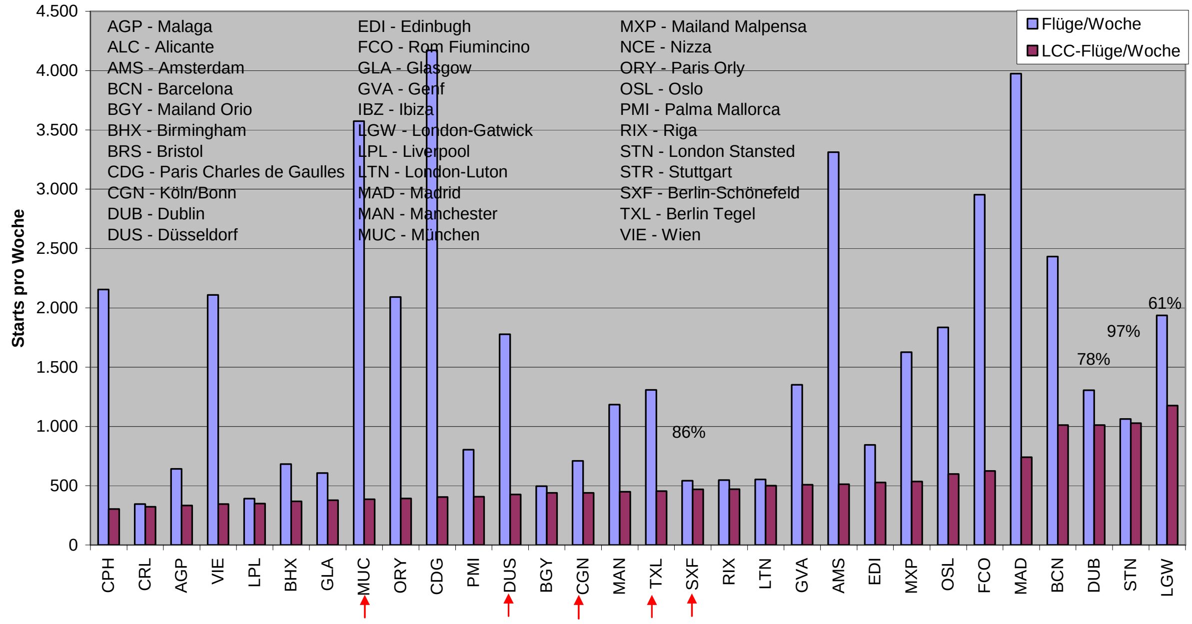

Figure 4: **Major LCC-Airports in Europe according to flights per week in January 2011**

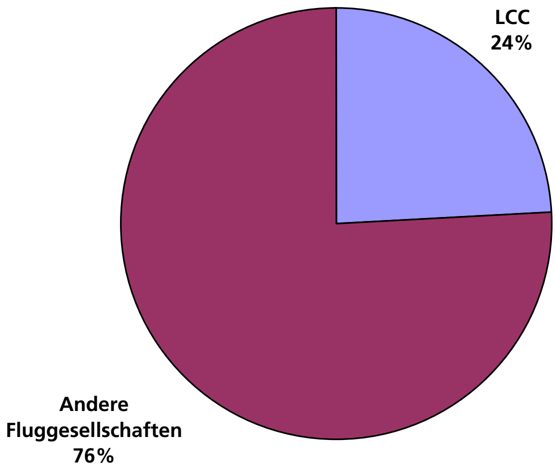

Figure 5: **Portions of European Air Traffic according to Number of Departures in January 2011**

Contact:

Dr. Peter Berster
Deutsches Zentrum für Luft- und Raumfahrt (DLR)
Flughafenwesen und Luftverkehr (FW)
Linder Höhe
D-51147 Köln
Tel.: (49) 02203-601-4554
Fax: (49) 02203-601-14554
E-Mail: peter.berster@dlr.de