

Global Aviation Monitor (GAM)

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

March 2013



Main Results of Global Air Transport Supply Analysis and Outlook

Background:

- Covers about 3,500 airports worldwide
- Covers about 850 airlines worldwide
- Maximum in air transport supply in 2012: Nearly 31.8 M flights (non-stop) worldwide
- Busiest month 2013: March with 2.65 M flights
- Air traffic showed stagnating growth rates since September 2012
- Forecasting methodology: Time series analysis

Analysis: April 2012 – March 2013

Global

- March 2013: 2.65 M flights supplied
- About 5% growth per year before financial crisis 2008/2009, then a rapid decline of more than 9% between February 2008 and February 2009, followed by a rather slow recovery until 2011 (7.2% increase between February 2009 and February 2011). Since 2011, the number of flights grows only very slowly; stagnation since September 2012
- Airports: Heterogeneous development of no. of flights offered; strong growth at Guangzhou
- Airlines: Heterogeneous development of no. of flights offered; strong growth of Turkish Airways, British Airway and Lion Air, strong growth of United Airlines because of merger with former Continental Airlines

World Regions, Europe

- Stagnation and small increase of traffic worldwide since September 2012; but small decrease in March e.g. in Europe, still growth in Asia
- Airports: Heterogeneous developments of no. of flights offered; strong increase at Istanbul, however decline at some airports e.g. Madrid
- Airlines: Heterogeneous developments of flights, some airlines e.g. Turkish Airways with strong growth, some growth in the low cost segment e.g. Wizz, some airlines e.g. Swiss with decrease. Startup of HOP! from several former regional carriers of Air France.

Germany

- Airports: Some small airports e.g. Niederrhein or Lubeck with traffic growth, most bigger German airports e.g. Hamburg, Stuttgart or Cologne with downward trends
- Airlines: Heterogeneous developments of number of flights offered; strong growth of Turkish Airlines and British Airways, most airlines with decrease; former codeshare flights (with Lufthansa) are now operated only by Air Dolomiti

Outlook: April 2013 – June 2013

Global

- For the next few months, a stagnation/small increase of traffic growth is expected

World Regions, Europe

- A decrease of traffic growth in Europe is expected

Germany

- For the next few month, a decrease of traffic growth is expected

Rank	Airport	03/2013	Growth rate
1	Atlanta Hartsfield-Jackson Intl	38.872	-1,2
2	Chicago O'Hare International	36.320	1,4
3	Dallas/Fort Worth Intl	28.215	6,7
4	Denver Intl	24.483	-3,2
5	Beijing Capital	23.513	3,3
6	Los Angeles International	23.497	-3,0
7	Charlotte	22.722	2,3
8	Houston George Bush Intercontinental	21.100	-2,3
9	London Heathrow	19.964	-1,1
10	Frankfurt International	18.837	-5,7
11	Paris Charles de Gaulle	18.477	-3,6
12	Detroit Wayne County	18.077	-1,3
13	Philadelphia International	17.725	1,7
14	Minneapolis International	17.570	3,9
15	Phoenix Sky Harbor Intl .	17.432	-3,5
16	Newark Liberty International	16.937	-0,8
17	Toronto Lester B Pearson Intl	16.873	3,1
18	Tokyo Haneda	16.790	-0,5
19	New York J F Kennedy International	16.566	-0,7
20	Amsterdam	16.279	-3,0
21	New York La Guardia	16.171	1,8
22	Guangzhou	16.045	8,9
23	San Francisco International	16.008	-1,6
24	Jakarta Soekarno-Hatta	15.783	3,3
25	Shanghai Pudong International	15.457	2,2

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

Rank	Airport	03/2013	Growth rate
1	Frankfurt International	18.837	-5,7
2	Munich International	14.887	-6,9
3	Dusseldorf International	7.797	-9,0
4	Berlin Tegel	6.780	3,7
5	Hamburg	4.941	-14,0
6	Stuttgart	3.571	-10,5
7	Cologne/Bonn K.A.	3.006	-16,4
8	Hanover	1.952	-10,8
9	Berlin Schoenefeld	1.944	-14,7
10	Nuremberg	1.667	-8,6
11	Bremen	926	-16,4
12	Frankfurt Hahn	727	-16,4
13	Dresden	726	-31,6
14	Leipzig/Halle	714	-8,5
15	Dusseldorf Niederrhein	564	19,0
16	Dortmund	485	-4,0
17	Friedrichshafen	343	-10,4
18	Saarbrücken Ensheim	325	25,5
19	Münster	306	-39,4
20	Karlsruhe/Baden Baden	248	-20,3
21	Paderborn	216	-16,9
22	Memmingen	173	-12,2
23	Hamburg Luebeck	82	17,1
24	Augsburg	48	41,2
25	Westerland	44	18,9

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

Rank	Airport	03/2013	Growth rate
1	London Heathrow	19.964	-1,1
2	Frankfurt International	18.837	-5,7
3	Paris Charles de Gaulle	18.477	-3,6
4	Amsterdam	16.279	-3,0
5	Munich International	14.887	-6,9
6	Istanbul Ataturk	14.836	10,5
7	Madrid Barajas	14.451	-8,1
8	Rome Fiumicino	11.220	-7,2
9	Barcelona	10.181	-6,4
10	Paris Orly	9.604	-3,2
11	Vienna	9.366	-7,9
12	Zurich	9.354	-4,5
13	Moscow Domodedovo	9.002	3,4
14	Copenhagen	8.986	-12,9
15	London Gatwick	8.646	-4,2
16	Oslo	8.508	-5,8
17	Moscow Sheremetyevo International	8.397	-2,3
18	Stockholm Arlanda	8.071	-6,3
19	Dusseldorf International	7.797	-9,0
20	Brussels	7.498	-6,6
21	Berlin Tegel	6.780	3,7
22	Helsinki	6.587	-5,2
23	Geneva	6.334	0,5
24	Milan Malpensa	6.130	-8,4
25	Dublin	5.978	4,1

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

Source: OAG 2012/13, DLR 2012/13

Rank	Airline	03/2013	Growth rate
1	United Airlines	170.602	78,8
2	Delta Air Lines	164.717	-2,3
3	American Airlines	109.956	3,0
4	Southwest Airlines	99.123	0,6
5	US Airways	98.638	-2,0
6	Lufthansa German Airlines	52.799	-10,1
7	China Southern Airlines	51.514	7,7
8	Air Canada	47.665	-0,6
9	China Eastern Airlines	45.392	7,7
10	Air France	42.693	-6,0
11	Ryanair	36.540	1,6
12	All Nippon Airways	33.309	-1,2
13	easyJet	33.281	1,8
14	Air China	32.323	3,2
15	British Airways	30.420	16,7
16	Gol Transportes Aereos	27.582	2,2
17	Turkish Airlines	27.433	16,4
18	Alaska Airlines	25.537	3,3
19	TAM Linhas Aereas	24.306	-6,7
20	JetBlue Airways Corporation	24.287	6,1
21	SAS Scandinavian Airlines	24.172	4,2
22	Lion Air	23.823	32,6
23	Qantas Airways	23.361	1,2
24	Azul	22.892	109,2
25	Japan Airlines International	21.296	1,2

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

Rank	Airline	03/2013	Growth rate
1	Lufthansa German Airlines	32.127	-11,2
2	Air Berlin	9.500	-13,9
3	germanwings	3.475	0,6
4	Ryanair	1.942	3,5
5	easyJet	1.675	-2,6
6	Air France	1.589	-9,6
7	KLM-Royal Dutch Airlines	1.331	-2,7
8	British Airways	1.296	15,7
9	Swiss	1.082	-5,6
10	Condor Flugdienst	995	1,8
11	SAS Scandinavian Airlines	994	-12,7
12	Turkish Airlines	940	26,3
13	Austrian Airlines AG	816	-7,0
14	TUIfly	806	0,2
15	LOT - Polish Airlines	720	2,1
16	Aeroflot Russian Airlines	540	-7,1
17	Luxair	535	10,3
18	Intersky	400	-4,8
19	Air Dolomiti	398	445,2
20	Iberia	391	6,5
21	United Airlines	375	51,2
22	SunExpress	358	-21,0
23	Pegasus Airlines	356	102,3
24	Emirates	341	-0,6
25	Wizz Air	329	3,8

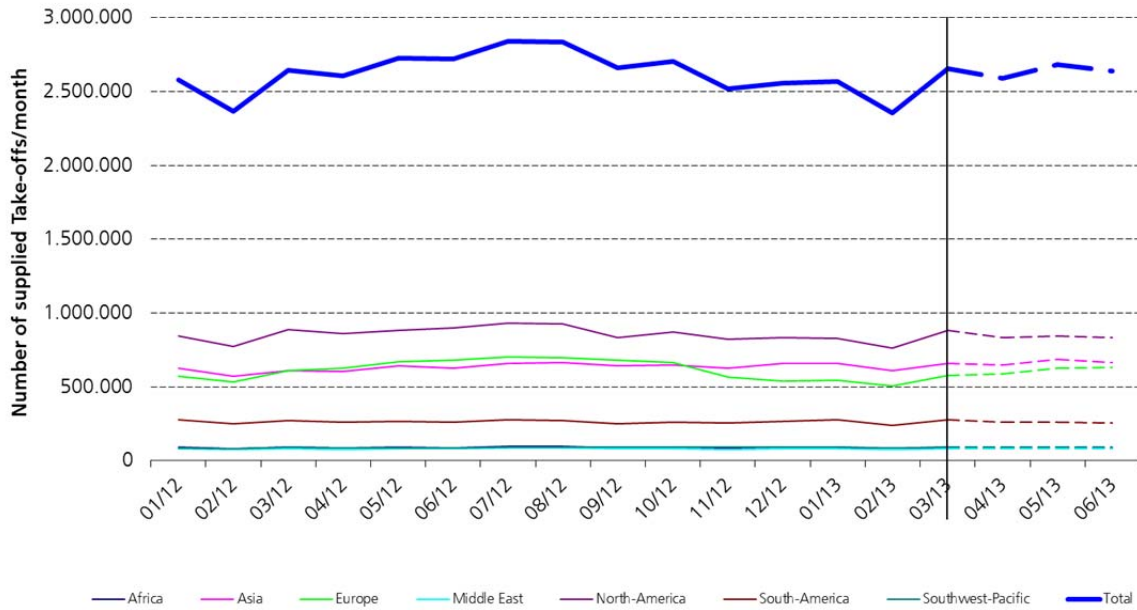
Tab. 6: Number of monthly Take-offs by the biggest Airlines in Germany

Rank	Airline	03/2013	Growth rate
1	Lufthansa German Airlines	48.600	-10,9
2	Air France	39.071	-6,4
3	Ryanair	36.169	1,7
4	easyJet	32.674	1,6
5	British Airways	25.044	19,7
6	SAS Scandinavian Airlines	23.891	4,2
7	Turkish Airlines	23.750	14,5
8	Iberia	16.314	-18,7
9	KLM-Royal Dutch Airlines	16.005	-3,1
10	Air Berlin	14.741	-12,9
11	Flybe	13.574	-10,9
12	Alitalia	12.286	-8,6
13	Swiss	11.901	-4,0
14	Aeroflot Russian Airlines	11.289	10,6
15	Norwegian Air Shuttle	10.992	-1,8
16	Wideroe's Flyveselskap	10.329	0,2
17	Austrian Airlines AG	9.952	-3,5
18	TAP Air Portugal	7.999	-1,7
19	Vueling Airlines	7.863	-3,4
20	Pegasus Airlines	7.832	24,3
21	Finnair	7.602	0,8
22	Aer Lingus	7.275	5,7
23	Wizz Air	6.212	55,8
24	LOT - Polish Airlines	6.200	-6,1
25	Brussels Airlines	5.647	-8,3

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

Source: OAG 2012/13, DLR 2012/13

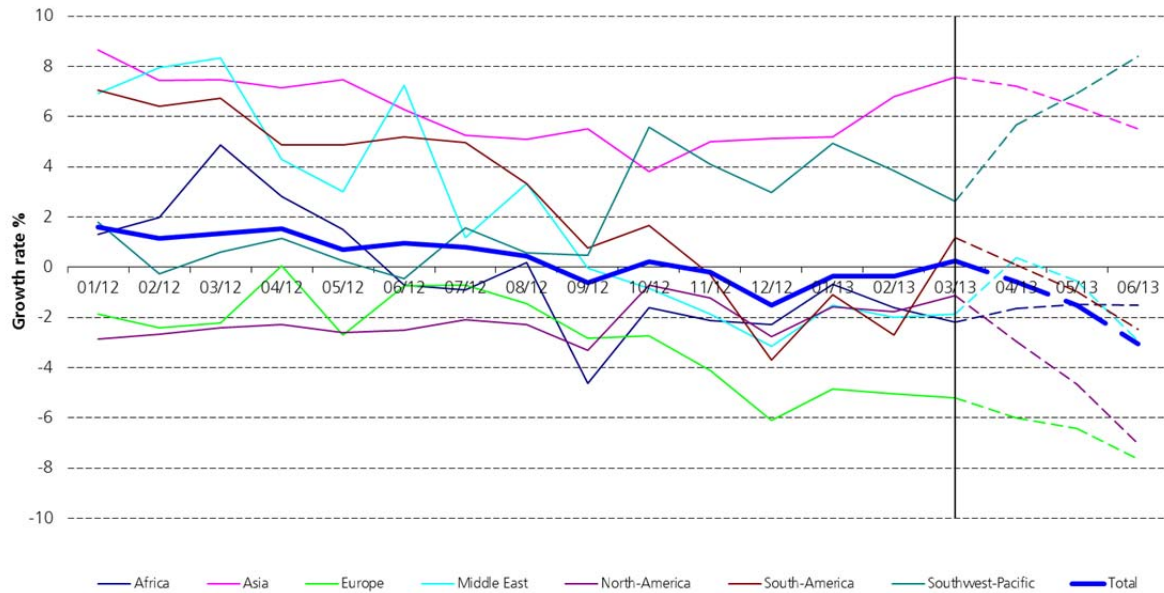
Development of the Global Air Transport Supply



Source: OAG 2012/2013, DLR 2012/2013

Fig. 1: Development of the Global Air Transport Supply

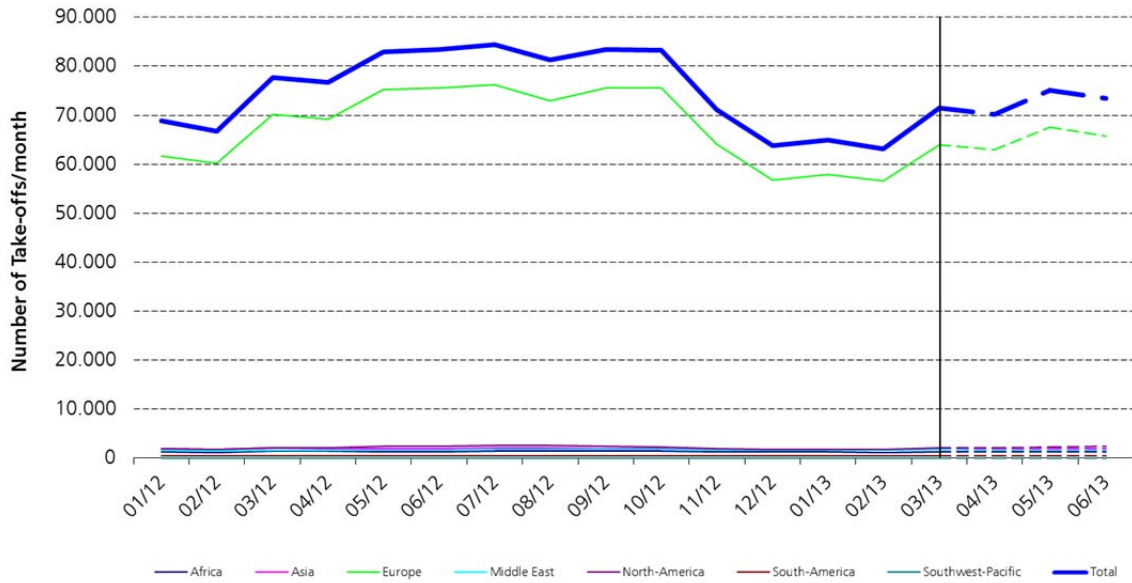
Changes in the Global Air Transport Supply



Source: OAG 2012/2013, DLR 2012/2013

Fig. 2: Changes in the Global Air Transport Supply

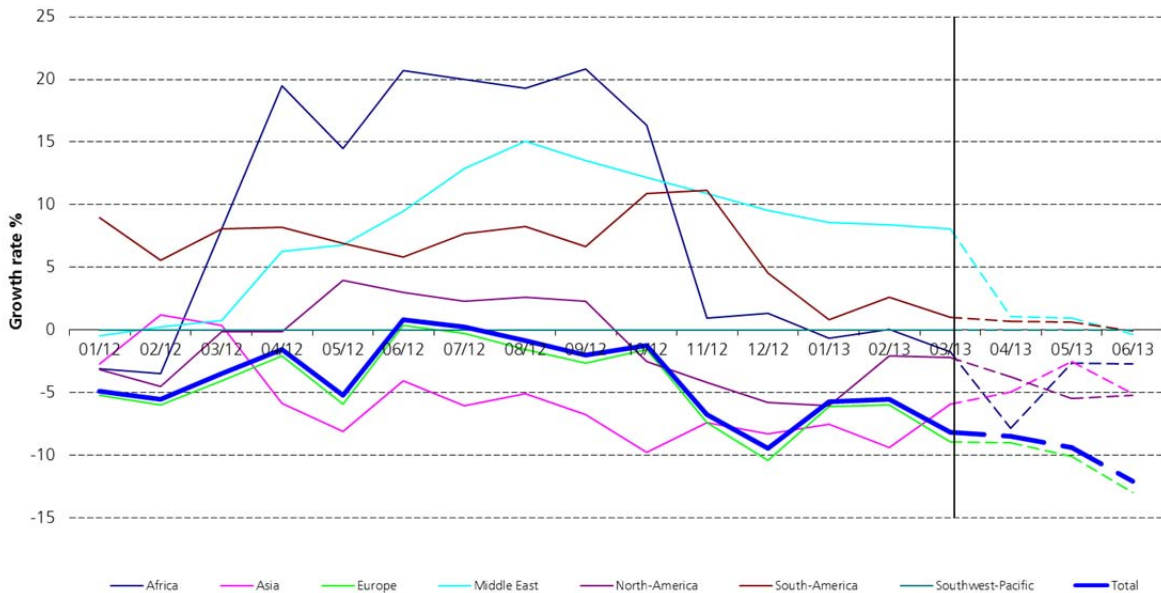
Development of the German Air Transport Supply



Source: OAG 2012/2013, DLR 2012/2013

Fig. 3: Development of the German Air Transport Supply

Changes in the German Air Transport Supply



Source: OAG 2012/2013, DLR 2012/2013

Fig. 4: Changes in the German Air Transport Supply

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