

# Global Aviation Monitor (GAM)

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

June 2015



## 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 of 2014: More than 33 M flights (non-stop) worldwide, new record value
- Busiest month 2014: July with 2.96 M flights
- Air traffic increases slowly since April 2013
- Forecasting methodology: Time series analysis

### Analysis: July 2014 – June 2015

#### Global

- June 2015: 2.9 M flights supplied (+3.6%)
- 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 between September 2012 and March 2013, small growth rates since April 2013
- Airports: Heterogeneous development of no. of flights offered; strong growth at Shanghai Pudong (+14.7%)
- Airlines: Heterogeneous development of no. of flights offered; strong growth of Aeroflot, AVIANCA and China Eastern; strong decrease of United Airlines

#### World Regions, Europe

- Overall small increase since April 2013; in Europe, small traffic increase since July 2013; in Asia continued growth; no growth in North America
- Airports: Heterogeneous developments of no. of flights offered; strong increase at Istanbul Sabiha Gokcen and Dublin however decline at some airports, e.g. Moscow Domodedovo and Oslo
- Airlines: Heterogeneous developments of flights, some airlines, e.g. Aeroflot and Alitalia with strong growth, some growth in the low cost segment, e.g. Wizz, Ryanair, easyjet, germanwings and Vueling (former Lufthansa flights in Germany and Europe are now operated by germanwings except at Frankfurt and Munich), some airlines, e.g. Air Berlin, Austrian Airlines and Air France with decrease

#### Germany

- Airports: Some airports, e.g. Dresden, Hamburg, Stuttgart, Berlin Schoenefeld and Niederrhein, with traffic growth; some German airports with downward trend, e.g. Leipzig and Bremen
- Airlines: Heterogeneous developments of number of flights offered; strong growth of e.g. germanwings, Ryanair, easyjet and Wizz; some airlines, e.g. Air Berlin and Air France, with decreasing traffic

### Outlook: July 2015 – September 2015

#### Global

- For the next few months, a small traffic growth of 3% is expected

#### World Regions, Europe

- For the next few months, a small traffic growth of 3% is expected

#### Germany

- For the next few month, a small traffic growth of 1-3% is expected

Rank	Airport	06/2015	Growth rate
1	Chicago O'Hare International	38.408	-3,0
2	Atlanta Hartsfield-Jackson Intl	37.008	2,2
3	Dallas/Fort Worth Intl	28.906	1,8
4	Los Angeles International	26.266	0,6
5	Beijing Capital	24.403	2,1
6	Denver Intl	22.390	-6,7
7	Charlotte	21.582	0,0
8	Houston George Bush Intercontinental	21.022	0,2
9	Frankfurt International	20.503	1,0
10	London Heathrow	20.375	0,9
11	Amsterdam	19.531	4,2
12	Paris Charles de Gaulle	19.498	2,0
13	Istanbul Ataturk	19.171	6,4
14	Shanghai Pudong International	18.836	14,8
15	New York J F Kennedy International	18.795	1,6
16	Toronto Lester B Pearson Intl	17.730	3,5
17	Tokyo Haneda	17.710	1,2
18	Jakarta Soekarno-Hatta	17.671	10,4
19	San Francisco International	17.154	-2,6
20	Seattle/Tacoma International	16.782	12,4
21	Philadelphia International	16.776	-1,7
22	Newark Liberty International	16.747	1,0
23	Guangzhou	16.489	2,4
24	Minneapolis International	16.136	-2,0
25	Phoenix Sky Harbor Intl .	16.078	0,4

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

Rank	Airport	06/2015	Growth rate
1	Frankfurt International	20.503	1,0
2	Munich International	15.917	3,1
3	Dusseldorf International	9.122	3,6
4	Berlin Tegel	7.880	1,2
5	Hamburg	6.325	5,9
6	Stuttgart	4.615	6,7
7	Cologne/Bonn K.A.	4.011	2,3
8	Berlin Schoenefeld	2.432	7,4
9	Hanover	2.262	3,5
10	Nuremberg	1.616	-0,5
11	Bremen	1.162	-7,0
12	Leipzig/Halle	950	-4,5
13	Dresden	887	8,3
14	Frankfurt Hahn	820	-4,0
15	Dortmund	612	-6,3
16	Dusseldorf Niederrhein	590	4,2
17	Munster	461	4,1
18	Karlsruhe/Baden Baden	449	21,4
19	Friedrichshafen	401	22,6
20	Memmingen	359	27,3
21	Saarbrücken Ensheim	334	25,1
22	Paderborn	314	1,0
23	Westerland	196	12,6
24	Mannheim	79	88,1
25	Erfurt	72	33,3

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

Rank	Airport	06/2015	Growth rate
1	Frankfurt International	20.503	1,0
2	London Heathrow	20.375	0,9
3	Amsterdam	19.531	4,2
4	Paris Charles de Gaulle	19.498	2,0
5	Istanbul Ataturk	19.171	6,4
6	Munich International	15.917	3,1
7	Madrid Barajas	15.514	8,3
8	Rome Fiumicino	14.546	2,4
9	Barcelona	13.175	2,8
10	London Gatwick	12.094	5,0
11	Moscow Sheremetyevo International	10.820	5,8
12	Copenhagen	10.714	0,8
13	Paris Orly	10.348	0,0
14	Moscow Domodedovo	10.195	-2,9
15	Vienna	10.113	-0,9
16	Zurich	10.059	-0,8
17	Oslo	10.007	-1,0
18	Brussels	9.577	3,2
19	Stockholm Arlanda	9.188	0,3
20	Palma Mallorca	9.126	2,7
21	Dusseldorf International	9.122	3,6
22	Istanbul Sabiha Gokcen	8.776	22,6
23	Dublin	8.717	15,2
24	Berlin Tegel	7.880	1,2
25	Manchester International	7.668	-1,0

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

Source: OAG 2014/15, DLR 2014/15

Rank	Airline	06/2015	Growth rate
1	Delta Air Lines	160.254	-0,1
2	United Airlines	148.762	-8,7
3	Southwest Airlines	111.514	9,3
4	American Airlines	108.732	0,6
5	US Airways	93.953	-1,7
6	China Southern Airlines	57.160	7,6
7	Ryanair	54.163	7,5
8	China Eastern Airlines	51.831	10,0
9	Air Canada	49.859	3,6
10	Lufthansa German Airlines	45.712	-4,0
11	easyJet	43.507	5,8
12	Turkish Airlines	39.907	8,6
13	Air China	35.340	5,4
14	All Nippon Airways	31.587	-0,4
15	British Airways	31.572	1,1
16	Air France	31.111	-2,2
17	Alaska Airlines	29.367	5,1
18	JetBlue Airways Corporation	26.993	5,0
19	SAS Scandinavian Airlines	26.799	1,2
20	Aeroflot Russian Airlines	26.060	12,8
21	Gol Transportes Aereos	25.420	5,5
22	Qantas Airways	22.968	-1,2
23	Japan Airlines International	22.174	-0,2
24	AVIANCA	21.774	10,4
25	Azul	21.684	-1,6

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

Rank	Airline	06/2015	Growth rate
1	Lufthansa German Airlines	27.540	-3,2
2	Air Berlin	11.356	-5,3
3	germanwings	9.667	14,3
4	Ryanair	2.701	9,0
5	easyJet	2.336	14,4
6	Condor Flugdienst	1.967	4,2
7	TUIfly	1.492	7,0
8	KLM-Royal Dutch Airlines	1.416	0,5
9	British Airways	1.362	4,8
10	Turkish Airlines	1.321	5,6
11	Air France	1.243	-2,3
12	SAS Scandinavian Airlines	1.182	2,6
13	Swiss	1.028	1,3
14	Germania	962	118,1
15	SunExpress	888	30,2
16	Austrian Airlines AG	863	1,6
17	Aeroflot Russian Airlines	714	3,5
18	Wizz Air	563	47,0
19	Air Dolomiti	553	5,3
20	Vueling Airlines	545	12,8
21	SunExpress Deutschland	489	144,5
22	Intersky	470	43,7
23	Luxair	441	-3,3
24	United Airlines	431	-4,2
25	British Midland Regional	430	163,8

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

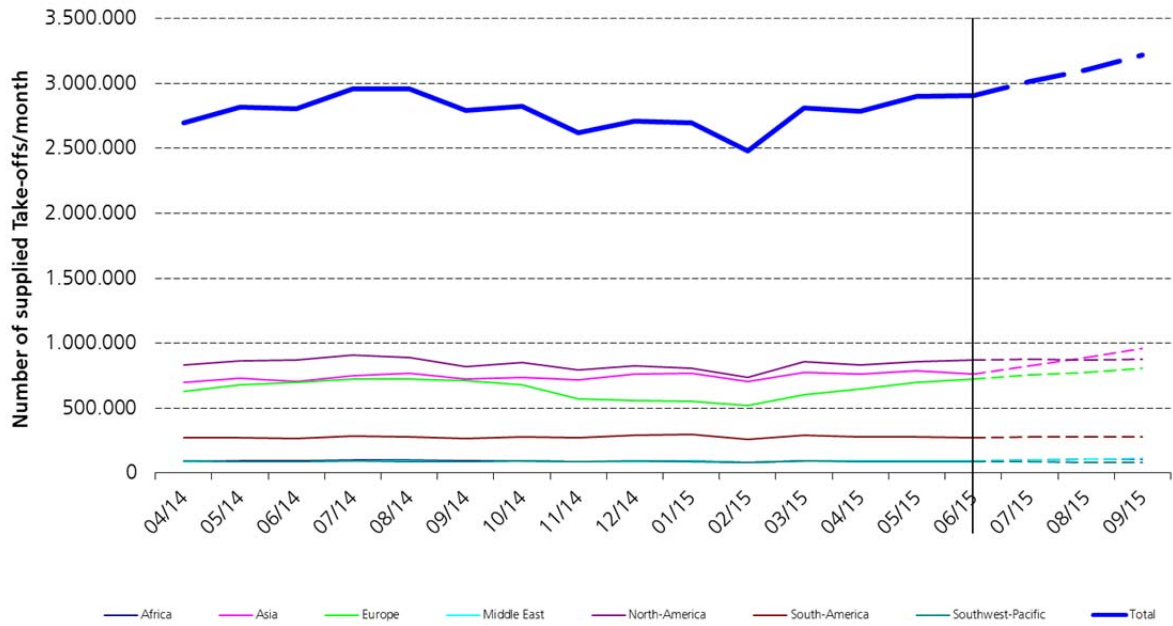
Rank	Airline	06/2015	Growth rate
1	Ryanair	53.467	7,4
2	easyJet	42.905	5,8
3	Lufthansa German Airlines	41.707	-4,1
4	Turkish Airlines	35.300	10,6
5	Air France	27.600	-2,3
6	SAS Scandinavian Airlines	26.463	1,1
7	British Airways	26.251	2,1
8	Aeroflot Russian Airlines	22.054	11,3
9	KLM-Royal Dutch Airlines	18.116	0,6
10	Air Berlin	18.108	-6,9
11	Alitalia	17.429	17,0
12	Vueling Airlines	17.169	13,7
13	Iberia	16.237	11,0
14	Norwegian Air Shuttle	15.387	-2,3
15	germanwings	15.297	15,0
16	Flybe	15.217	5,6
17	Pegasus Airlines	12.418	15,0
18	Swiss	11.667	-0,2
19	Wideroe's Flyveselskap	11.536	3,1
20	Wizz Air	10.445	25,5
21	Austrian Airlines AG	10.147	-3,6
22	TAP Air Portugal	9.106	1,8
23	Aer Lingus	8.957	-2,3
24	Finnair	8.934	17,4
25	Aegean Airlines	8.698	11,3

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

Source: OAG 2014/15, DLR 2014/15



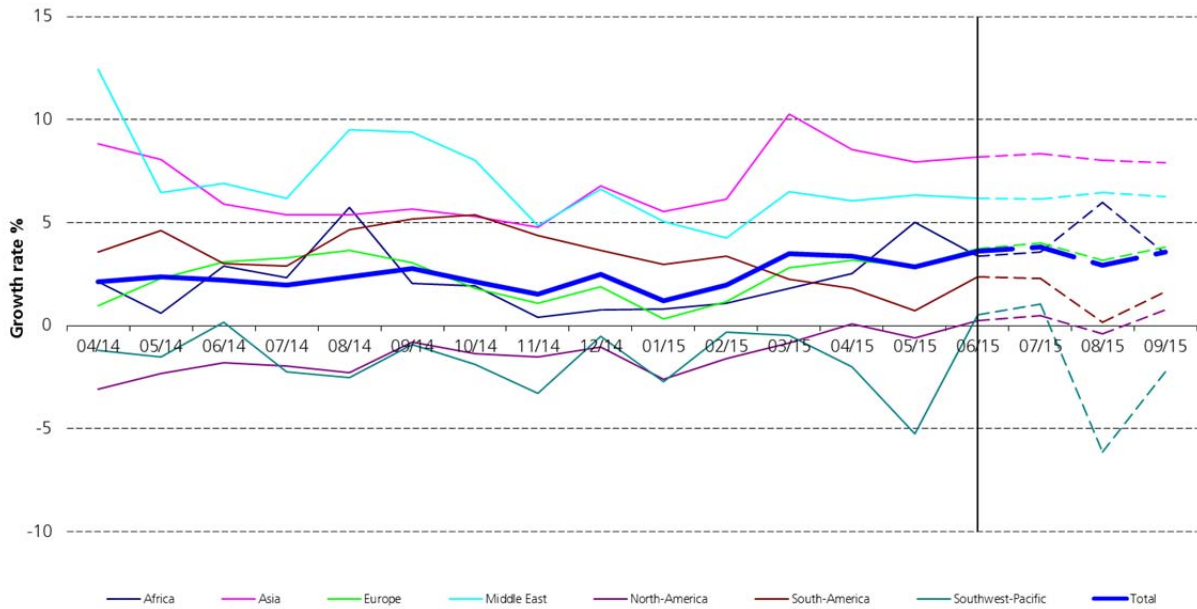
Development of the Global Air Transport Supply



Source: OAG 2014/2015, DLR 2014/2015

Fig. 1: Development of the Global Air Transport Supply

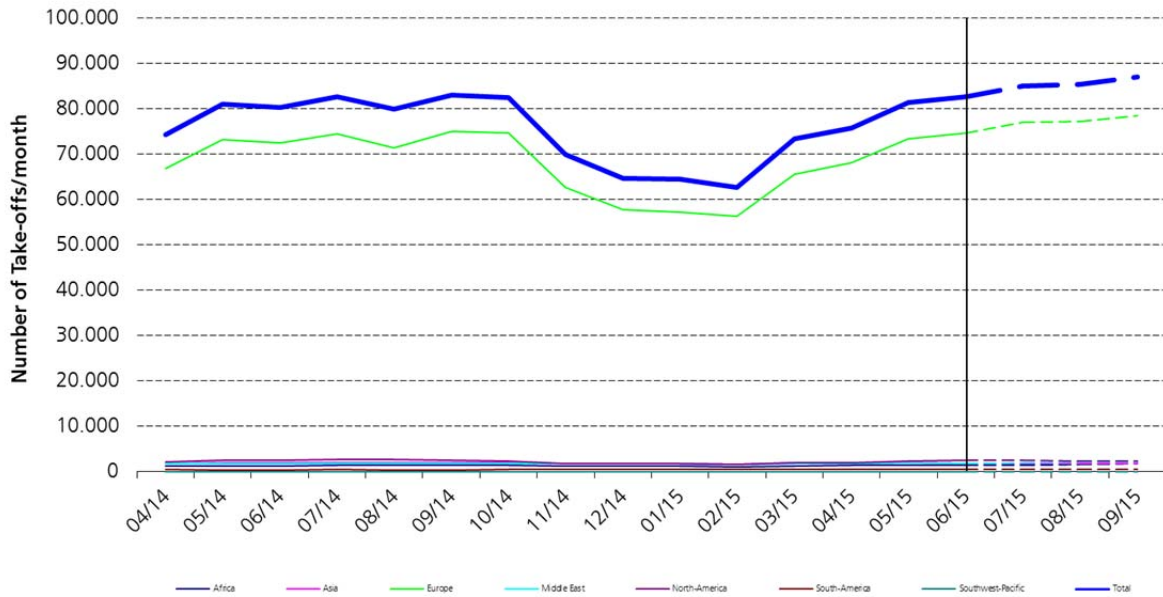
Changes in the Global Air Transport Supply



Source: OAG 2014/2015, DLR 2014/2015

Fig. 2: Changes in the Global Air Transport Supply

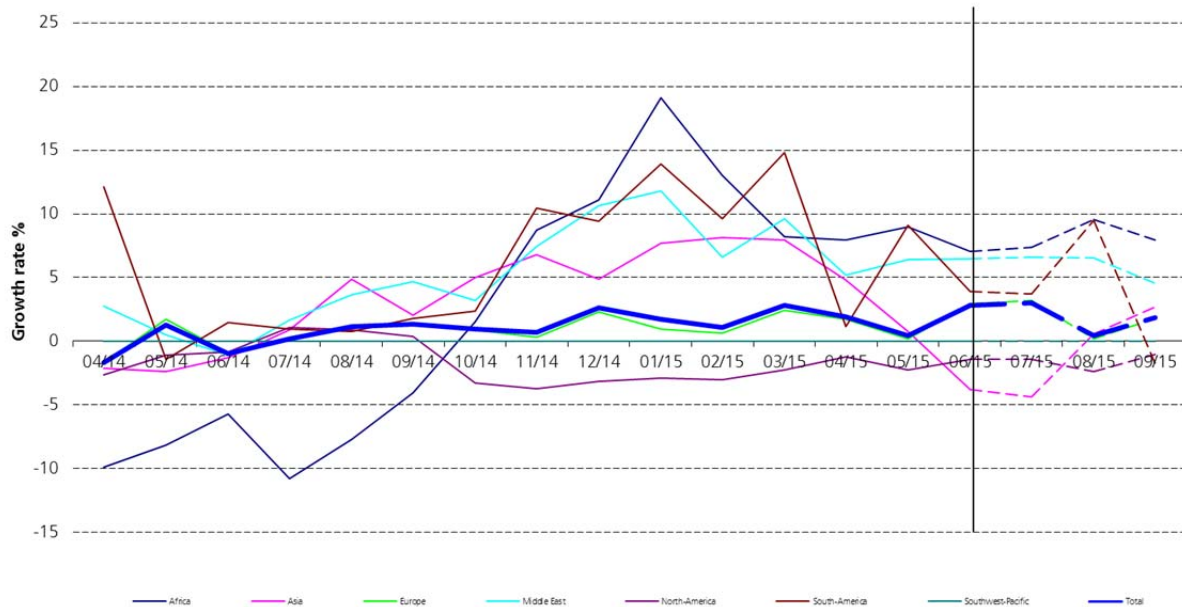
Development of the German Air Transport Supply



Source: OAG 2014/2015, DLR 2014/2015

Fig. 3: Development of the German Air Transport Supply

Changes in the German Air Transport Supply



Source: OAG 2013/2014, DLR 2013/2014

Fig. 4: Changes in the German Air Transport Supply

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