

Global Aviation Monitor (GAM)

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

March 2012



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 2011: Nearly 31.6 M flights (non-stop) worldwide
- Busiest month 2011: August with 2.82 M flights
- Air traffic showed downward trend since April 2008, with a turnaround in December 2009
- Forecasting methodology: Time series analysis

Analysis: April 2011 – March 2012

Global

- March 2012: 2.65 M flights supplied
- More than 9% decline in February 2008, 0% in November 2009, turnaround with 1% increase in December 2009, 5.9% in August 2010, 1.9% in December 2011 and 1.3% in March 2012.
- Airports: Most large US airports show some downwards tendency; strong growth at Jakarta
- Airlines: 6 out of the 10 biggest airlines are from USA, with downwards tendency of no. of flights offered; strong growth of Turkish Airways

World Regions, Europe

- Increase of traffic worldwide since December 2009; small decrease in North America and Europe, already strong growth in Asia and Middle East
- Airports: Heterogeneous development in air transport supply at most of the 10 biggest European airports; very strong increase at Istanbul and Moscow, however decline at e.g. Madrid, Helsinki and Milan Malpensa airport
- Airlines: Small increase of flights of some legacy carriers, except e.g. Aeroflot with strong growth, some growth in the low cost segment e.g. Wizz but decrease of Air Berlin

Germany

- Airports: Most German airports with downwards tendency
- Airlines: Heterogeneous developments of number of flights offered; decline in the low cost carrier segment, strong decrease of Ryanair, strong growth of Aeroflot

Outlook: April 2012 – June 2012

Global

- For the next few months, an small increase of the traffic of around 1-2% growth is expected

World Regions, Europe

- Small decrease of the traffic growth in Europe of around 1-2% is expected

Germany

- For the next few month, a small decrease of the traffic of around 2-3% growth is expected

Rank	Airport	03/2012	Growth rate
1	Atlanta Hartsfield-Jackson Intl	39.336	-1,1
2	Chicago O'Hare International	35.804	-5,5
3	Dallas/Fort Worth Intl	26.445	-2,3
4	Denver Intl	25.305	-4,7
5	Los Angeles International	24.226	3,8
6	Beijing Capital	22.758	4,3
7	Charlotte	22.210	0,5
8	Houston George Bush Intercontinental	21.603	-1,5
9	London Heathrow	20.185	-0,4
10	Frankfurt International	19.984	-0,1
11	Paris Charles de Gaulle	19.167	-3,5
12	Detroit Wayne County	18.312	-3,3
13	Phoenix Sky Harbor Intl .	18.060	-0,2
14	Philadelphia International	17.431	-4,0
15	Newark Liberty International	17.076	1,6
16	Minneapolis International	16.918	-2,4
17	Tokyo Haneda	16.880	1,8
18	Amsterdam	16.784	2,9
19	New York J F Kennedy International	16.690	-2,3
20	Toronto Lester B Pearson Intl	16.367	2,7
21	San Francisco International	16.269	6,5
22	Munich International	15.984	-2,7
23	New York La Guardia	15.880	-4,0
24	Madrid Barajas	15.721	-14,9
25	Jakarta Soekarno-Hatta	15.277	10,2

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

Rank	Airport	03/2012	Growth rate
1	Frankfurt International	19.984	-0,1
2	Munich International	15.984	-2,7
3	Dusseldorf International	8.571	-1,3
4	Berlin Tegel	6.535	-3,9
5	Hamburg	5.746	-3,0
6	Stuttgart	3.992	-2,3
7	Cologne/Bonn K.A.	3.597	-1,9
8	Berlin Schoenefeld	2.280	-6,3
9	Hanover	2.188	-3,9
10	Nuremberg	1.823	-8,0
11	Bremen	1.107	-11,8
12	Dresden	1.061	7,8
13	Frankfurt Hahn	870	-7,4
14	Leipzig/Halle	780	-17,9
15	Dortmund	505	5,2
16	Munster	505	-17,3
17	Dusseldorf Niederrhein	474	-39,5
18	Friedrichshafen	383	-26,2
19	Karlsruhe/Baden Baden	311	-17,5
20	Paderborn	260	-15,0
21	Saarbrücken Ensheim	259	-24,3
22	Memmingen	197	-8,4
23	Hamburg Luebeck	70	-27,8
24	Hof	44	-36,2
25	Hamburg Finkenwerder	44	-

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

Rank	Airport	03/2012	Growth rate
1	London Heathrow	20.185	-0,4
2	Frankfurt International	19.984	-0,1
3	Paris Charles de Gaulle	19.167	-3,5
4	Amsterdam	16.784	2,9
5	Munich International	15.984	-2,7
6	Madrid Barajas	15.721	-14,9
7	Istanbul Ataturk	13.422	22,7
8	Rome Fiumicino	12.086	-9,1
9	Barcelona	10.877	-6,1
10	Copenhagen	10.321	-2,5
11	Vienna	10.166	-1,5
12	Paris Orly	9.923	1,3
13	Zurich	9.792	-0,6
14	Oslo	9.032	-0,8
15	London Gatwick	9.022	-4,8
16	Moscow Domodedovo	8.706	9,8
17	Stockholm Arlanda	8.614	-0,2
18	Moscow Sheremetyevo International	8.591	20,2
19	Dusseldorf International	8.571	-1,3
20	Brussels	8.025	-7,4
21	Helsinki	6.950	-11,0
22	Milan Malpensa	6.695	-12,8
23	Berlin Tegel	6.535	-3,9
24	Geneva	6.305	3,7
25	Manchester International	6.049	4,4

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

Source: OAG 2011/12, DLR 2011/12

Rank	Airline	03/2012	Growth rate
1	Delta Air Lines	168.618	-5,9
2	American Airlines	106.764	-3,5
3	US Airways	100.668	-0,6
4	Southwest Airlines	98.554	-1,3
5	United Airlines	95.428	-7,8
6	Continental Airlines	77.189	0,5
7	Lufthansa German Airlines	58.717	-1,5
8	Air Canada	47.969	1,2
9	China Southern Airlines	47.829	3,8
10	Air France	45.421	0,3
11	China Eastern Airlines	42.155	9,2
12	Ryanair	35.982	0,6
13	All Nippon Airways	33.720	3,5
14	easyJet	32.685	0,7
15	Air China	31.331	0,6
16	Gol Transportes Aereos	26.992	2,1
17	British Airways	26.070	0,6
18	TAM Linhas Aereas	26.040	-2,5
19	Alaska Airlines	24.714	0,3
20	Turkish Airlines	23.571	11,9
21	SAS Scandinavian Airlines	23.195	-0,2
22	Qantas Airways	23.074	3,9
23	JetBlue Airways Corporation	22.901	9,0
24	Iberia	21.147	-14,3
25	Japan Airlines International	21.053	1,8

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

Rank	Airline	03/2012	Growth rate
1	Lufthansa German Airlines	36.180	0,4
2	Air Berlin	11.036	-5,0
3	germanwings	3.454	-0,8
4	Ryanair	1.877	-28,2
5	Air France	1.758	-3,0
6	easyJet	1.719	-4,0
7	KLM-Royal Dutch Airlines	1.368	6,5
8	Swiss	1.146	0,3
9	SAS Scandinavian Airlines	1.139	-3,3
10	British Airways	1.120	-5,6
11	Condor Flugdienst	977	17,3
12	Austrian Airlines AG	877	-22,7
13	TUIfly	804	-12,9
14	Turkish Airlines	744	16,3
15	LOT - Polish Airlines	705	-2,5
16	Aeroflot Russian Airlines	581	49,4
17	Cirrus Airlines	501	-39,9
18	Luxair	485	-27,3
19	SunExpress	453	-22,2
20	Intersky	420	-22,2
21	Flybe	384	-25,4
22	Iberia	367	-23,9
23	Emirates	343	29,9
24	OLT Ostfriesische Lufttransport GmbH	343	41,2
25	Brussels Airlines	334	-8,2

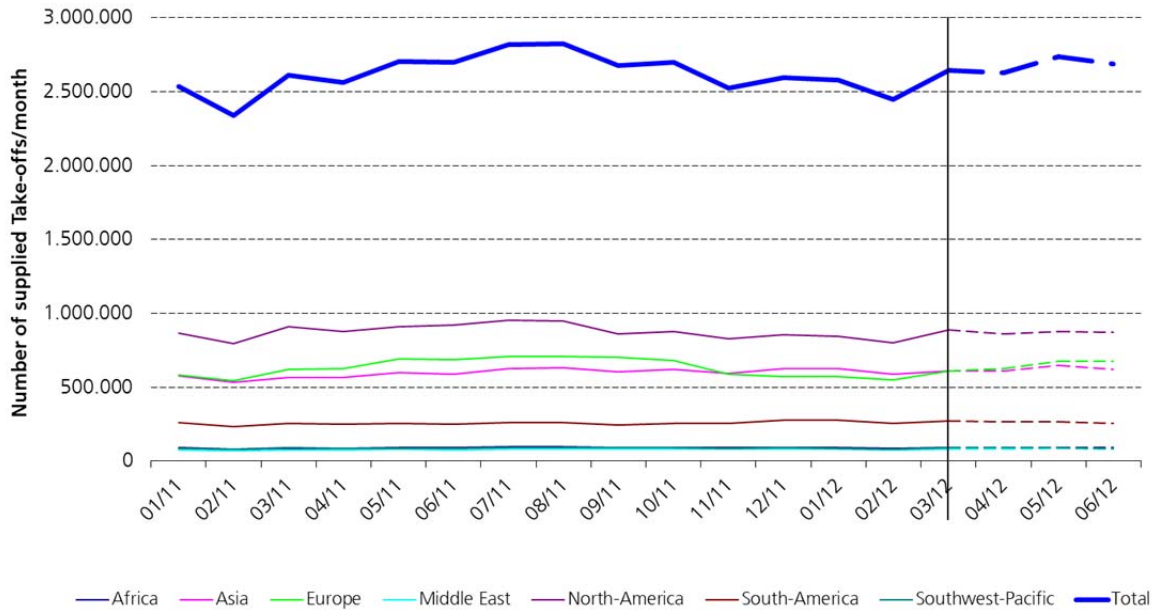
Tab. 6: Number of monthly Take-offs by the biggest Airlines in Germany

Rank	Airline	03/2012	Growth rate
1	Lufthansa German Airlines	54.573	-1,5
2	Air France	41.737	0,4
3	Ryanair	35.555	0,9
4	easyJet	32.148	1,1
5	SAS Scandinavian Airlines	22.930	-0,3
6	British Airways	20.919	0,4
7	Turkish Airlines	20.737	10,5
8	Iberia	20.056	-13,7
9	Air Berlin	16.921	-6,7
10	KLM-Royal Dutch Airlines	16.521	5,2
11	Flybe	15.243	5,7
12	Alitalia	13.438	-8,6
13	Swiss	12.393	1,9
14	Norwegian Air Shuttle	11.191	11,9
15	Austrian Airlines AG	10.309	-6,4
16	Wideroe's Flyveselskap	10.304	1,3
17	Aeroflot Russian Airlines	10.203	32,6
18	Vueling Airlines	8.141	27,4
19	TAP Air Portugal	8.138	1,6
20	Finnair	7.541	-9,5
21	Aer Lingus	6.882	4,4
22	LOT - Polish Airlines	6.601	-4,7
23	Pegasus Airlines	6.303	58,0
24	Brussels Airlines	6.159	-9,8
25	Wizz Air	5.674	14,0

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

Source: OAG 2011/12, DLR 2011/12

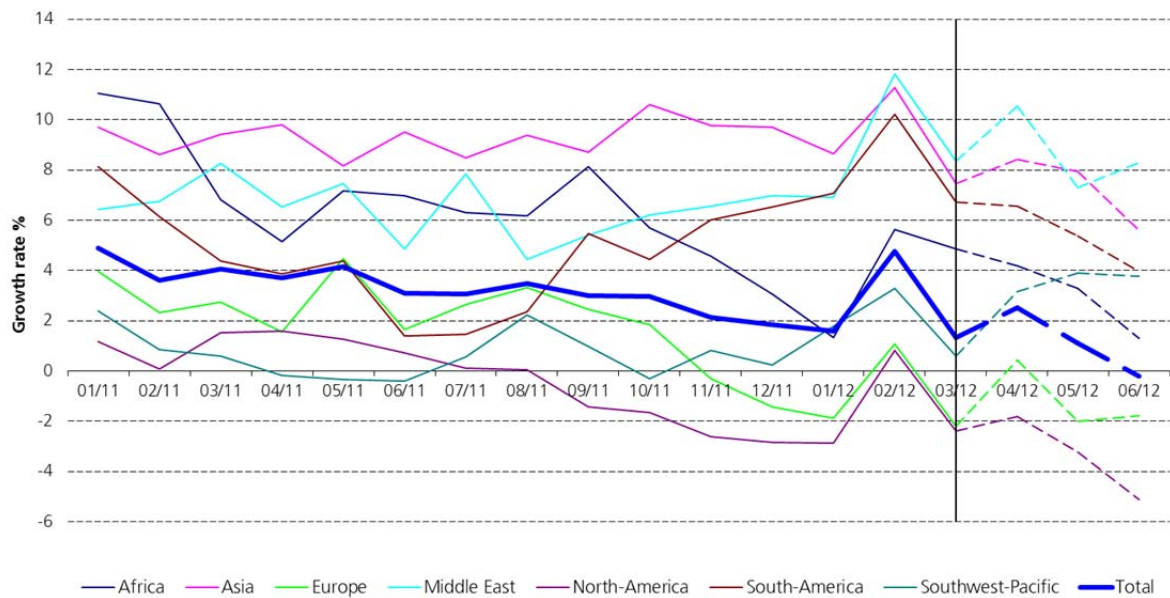
Development of the Global Air Transport Supply



Source: OAG 2011/2012, DLR 2011/2012

Fig. 1: Development of the Global Air Transport Supply

Changes in the Global Air Transport Supply



Source: OAG 2011/2012, DLR 2011/2012

Fig. 2: Changes in the Global Air Transport Supply

Development of the German Air Transport Supply

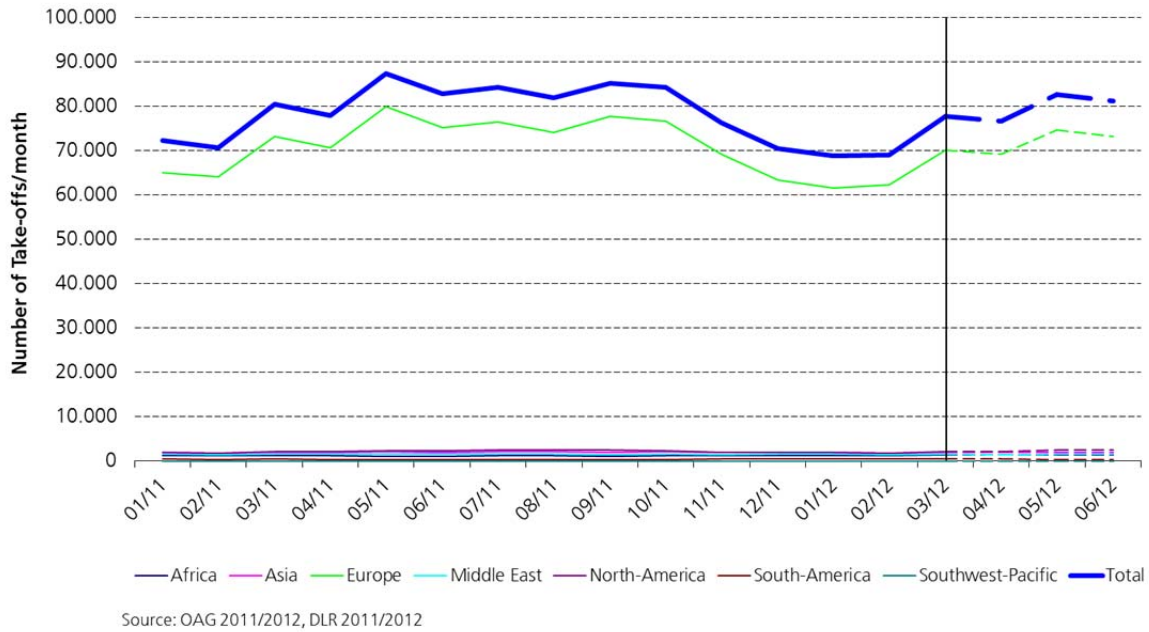


Fig. 3: Development of the German Air Transport Supply

Changes in the German Air Transport Supply

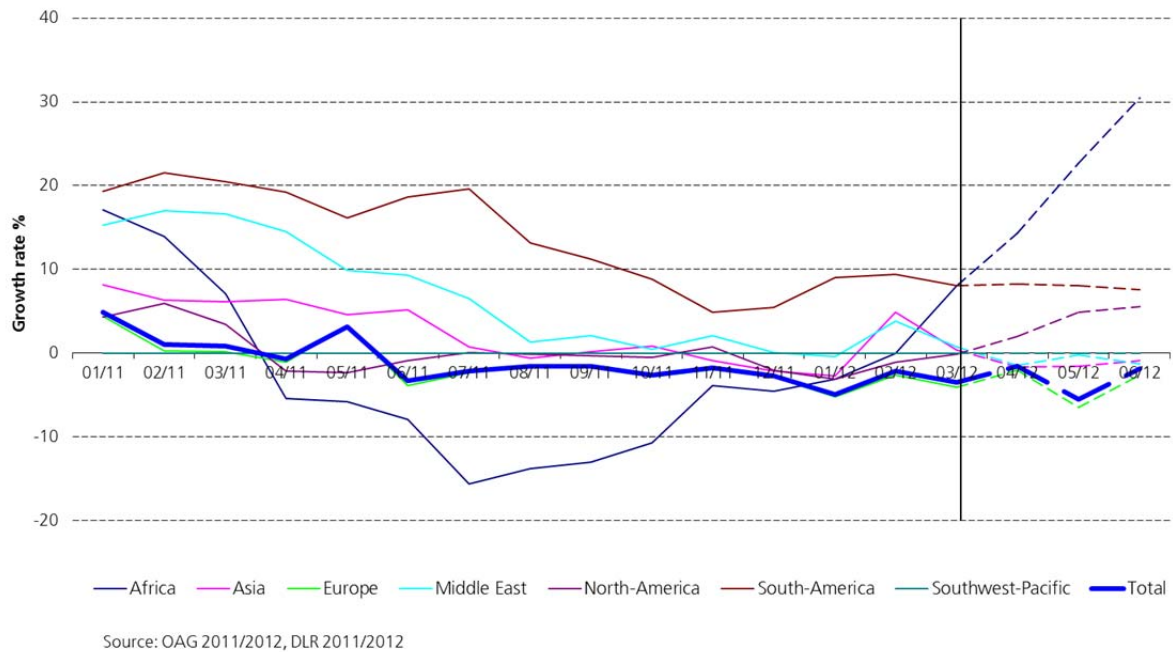


Fig. 4: Changes in the German Air Transport Supply

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