

Global Aviation Monitor (GAM)

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

June 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: May with 2.75 M flights
- Air traffic showed stagnating and small growth rates since September 2012
- Forecasting methodology: Time series analysis

Analysis: July 2012 – June 2013

Global

- June 2013: 2.74 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 and, small increase since September 2012)
- Airports: Heterogeneous development of no. of flights offered; strong growth at Istanbul
- Airlines: Heterogeneous development of no. of flights offered; strong growth of Turkish Airways; some growth in the low cost segment

World Regions, Europe

- Stagnation and small increase of traffic worldwide since September 2012; but small decrease in June 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. Norwegian, Wizz and Vueling, some airlines e.g. Iberia 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 Germanwings, Turkish Airlines and British Airways, some airlines with decrease; former codeshare flights (with Lufthansa) are now operated only by Air Dolomiti; Vueling grows by taking over Clickair and former Spanair flights

Outlook: July 2013 – September 2013

Global

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

World Regions, Europe

- A small decrease of traffic growth in Europe is expected

Germany

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

Rank	Airport	06/2013	Growth rate
1	Chicago O'Hare International	38.783	2,0
2	Atlanta Hartsfield-Jackson Intl	38.564	-2,5
3	Dallas/Fort Worth Intl	28.387	5,6
4	Los Angeles International	25.162	2,4
5	Denver Intl	24.239	-7,0
6	Beijing Capital	23.877	2,3
7	Charlotte	22.285	2,5
8	Houston George Bush Intl	20.801	-2,3
9	Frankfurt International	20.610	-0,8
10	London Heathrow	20.032	2,2
11	Paris Charles de Gaulle	18.950	-3,0
12	Amsterdam	18.293	3,3
13	Detroit Wayne County	18.287	-1,2
14	Minneapolis International	17.590	0,9
15	Philadelphia International	17.464	-0,3
16	San Francisco International	17.309	-0,9
17	New York J F Kennedy Intl	17.226	0,5
18	Tokyo Haneda	16.975	4,1
19	Toronto Lester B Pearson Intl	16.924	-0,0
20	Newark Liberty International	16.921	-0,4
21	Istanbul Ataturk	16.389	10,3
22	Phoenix Sky Harbor Intl .	16.302	-3,1
23	Munich International	16.004	-2,3
24	Jakarta Soekarno-Hatta	15.895	0,5
25	New York La Guardia	15.890	1,2

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

Rank	Airport	06/2013	Growth rate
1	Frankfurt International	20.610	-0,8
2	Munich International	16.004	-2,3
3	Berlin (total)	9.613	-4,0
4	Dusseldorf International	9.092	-0,6
5	Hamburg	5.693	-4,9
6	Stuttgart	4.308	-5,7
7	Cologne/Bonn K.A.	3.792	-5,4
8	Hanover	2.264	-5,4
9	Nuremberg	1.722	1,2
10	Bremen	1.122	-1,8
11	Frankfurt Hahn	975	-5,4
12	Leipzig/Halle	925	-1,1
13	Dusseldorf Niederrhein	872	14,0
14	Dresden	785	-15,7
15	Dortmund	638	2,4
16	Karlsruhe/Baden Baden	411	-20,5
17	Munster	395	-24,9
18	Friedrichshafen	362	-9,7
19	Saarbrücken Ensheim	320	21,2
20	Paderborn	309	-0,6
21	Memmingen	298	-19,9
22	Westerland	196	1,6
23	Hamburg Luebeck	129	4,9
24	Saarbrücken Zweibrücken	72	-11,1
25	Rostock-Laage	50	-25,4

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

Rank	Airport	06/2013	Growth rate
1	Frankfurt International	20.610	-0,8
2	London Heathrow	20.032	2,2
3	Paris Charles de Gaulle	18.950	-3,0
4	Amsterdam	18.293	3,3
5	Istanbul Ataturk	16.389	10,3
6	Munich International	16.004	-2,3
7	Madrid Barajas	13.696	-15,9
8	Rome Fiumicino	13.449	-2,8
9	Barcelona	12.362	-3,0
10	London Gatwick	11.072	0,0
11	Paris Orly	10.367	0,1
12	Copenhagen	10.295	7,4
13	Vienna	10.074	-7,1
14	Zurich	9.917	-2,0
15	Moscow Domodedovo	9.830	-3,0
16	Oslo	9.647	4,6
17	Berlin (total)	9.613	-4,0
18	Moscow Sheremetyevo Intl	9.503	6,6
19	Dusseldorf International	9.092	-0,6
20	Stockholm Arlanda	8.399	1,9
21	Palma Mallorca	8.351	0,6
22	Brussels	8.250	-4,7
23	Manchester International	7.555	1,8
24	Nice	7.255	0,3
25	Dublin	7.177	6,1

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

Source: OAG 2012/13, DLR 2012/13

Rank	Airline	06/2013	Growth rate
1	United Airlines	170.999	-2,8
2	Delta Air Lines	166.844	-1,6
3	American Airlines	108.903	2,3
4	Southwest Airlines	97.399	-1,4
5	US Airways	96.416	-0,6
6	Lufthansa German Airlines	56.180	-6,4
7	China Southern Airlines	51.600	1,3
8	Ryanair	50.154	2,7
9	Air Canada	46.479	-3,4
10	China Eastern Airlines	45.578	3,3
11	easyJet	38.634	2,7
12	Air France	36.224	-20,4
13	All Nippon Airways	33.596	2,2
14	Turkish Airlines	33.113	23,9
15	Air China	33.003	5,2
16	British Airways	29.811	10,6
17	Alaska Airlines	26.684	3,4
18	Gol Transportes Aereos	26.195	9,6
19	SAS Scandinavian Airlines	25.513	13,4
20	Lion Air	24.223	28,8
21	JetBlue Airways Corporation	24.168	7,8
22	Azul	22.829	96,5
23	TAM Linhas Aereas	22.457	-14,5
24	Qantas Airways	22.337	3,8
25	Japan Airlines International	21.566	4,7

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

Rank	Airline	06/2013	Growth rate
1	Lufthansa German Airlines	33.878	-6,6
2	Air Berlin	11.925	-4,9
3	germanwings	4.720	15,4
4	Ryanair	3.025	8,5
5	easyJet	1.845	2,7
6	Condor Flugdienst	1.791	4,0
7	Air France	1.459	-13,2
8	KLM-Royal Dutch Airlines	1.407	-1,3
9	TUIfly	1.377	-12,4
10	British Airways	1.235	11,7
11	Turkish Airlines	1.159	17,5
12	Swiss	1.025	-13,9
13	SAS Scandinavian Airlines	1.023	-0,7
14	Austrian Airlines AG	835	0,1
15	LOT - Polish Airlines	697	1,9
16	Intersky	539	26,5
17	Aeroflot Russian Airlines	526	-0,4
18	SunExpress	521	-4,8
19	Luxair	515	8,4
20	Air Dolomiti	494	615,9
21	United Airlines	467	-2,7
22	Czech Airlines	377	30,0
23	Vueling Airlines	376	182,7
24	Wizz Air	366	10,6
25	Emirates	326	-1,5

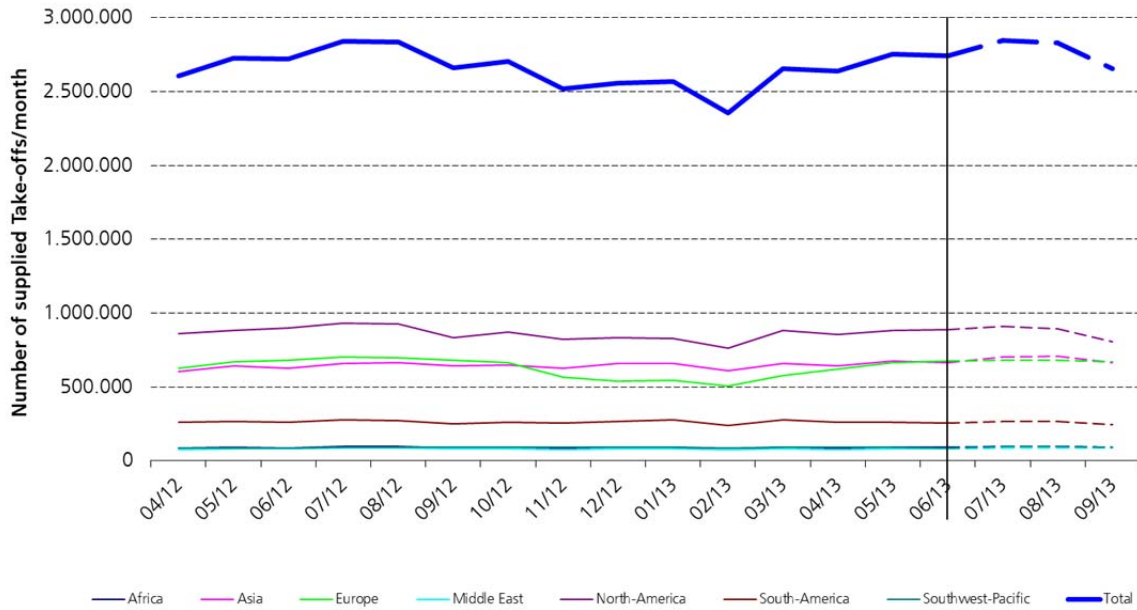
Tab. 6: Number of monthly Take-offs by the biggest Airlines in Germany

Rank	Airline	06/2013	Growth rate
1	Lufthansa German Airlines	51.765	-6,9
2	Ryanair	49.392	2,1
3	easyJet	38.124	2,6
4	Air France	32.459	-22,1
5	Turkish Airlines	29.264	23,3
6	SAS Scandinavian Airlines	25.196	13,4
7	British Airways	24.479	12,0
8	Air Berlin	19.447	-4,8
9	KLM-Royal Dutch Airlines	17.444	2,6
10	Flybe	15.632	-5,5
11	Alitalia	14.627	-7,7
12	Iberia	14.400	-24,2
13	Norwegian Air Shuttle	13.881	14,0
14	Aeroflot Russian Airlines	12.731	11,9
15	Vueling Airlines	12.078	15,1
16	Swiss	11.714	-2,9
17	Wideroe's Flyveselskap	10.878	3,7
18	Austrian Airlines AG	10.612	-4,2
19	Pegasus Airlines	9.124	18,8
20	TAP Air Portugal	8.882	-0,0
21	Aer Lingus	8.500	3,7
22	HOP!	8.084	485,4
23	Wizz Air	7.387	85,2
24	germanwings	7.384	12,2
25	Finnair	7.351	5,1

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

Source: OAG 2012/13, DLR 2012/13

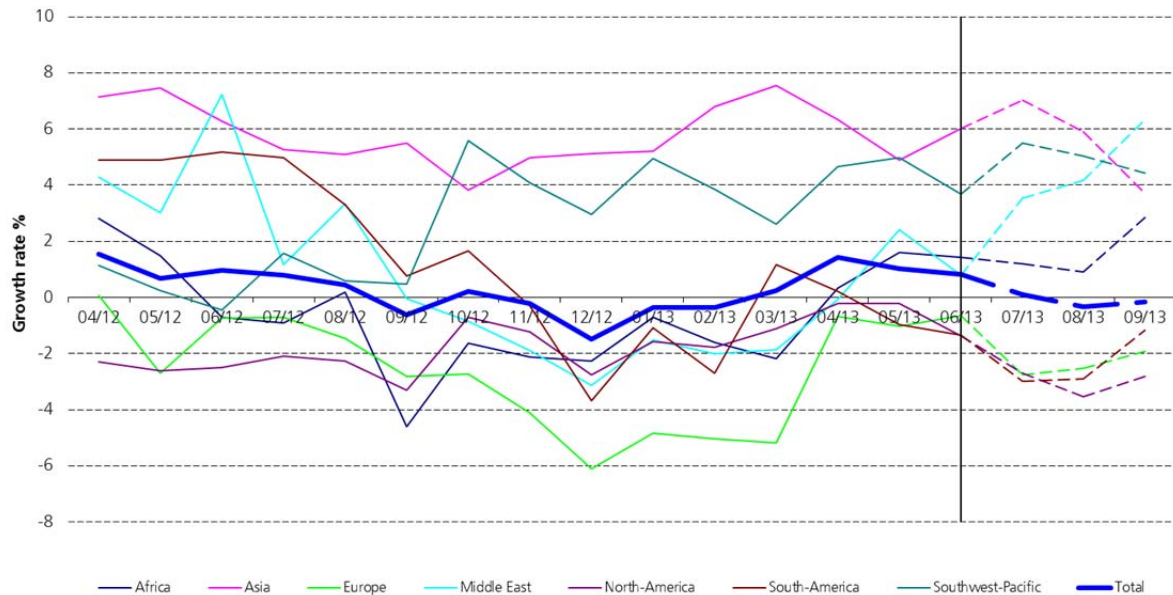
Development of the Global Air Transport Supply



Source: OAG 2012/2013, DLR 2012/2013

Fig. 1: Development of the Global Air Transport Supply

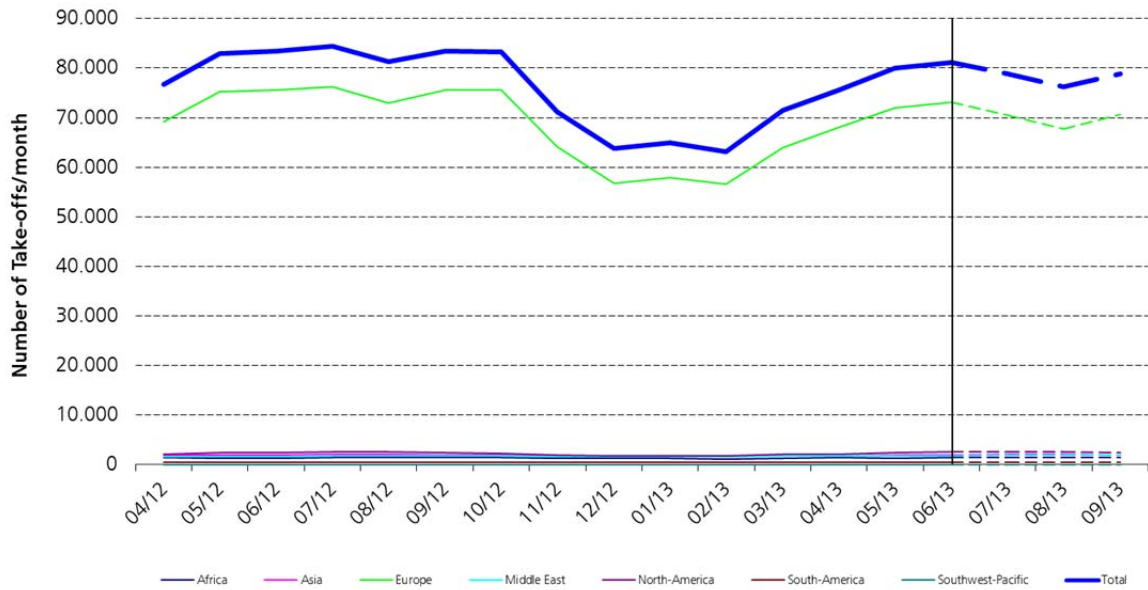
Changes in the Global Air Transport Supply



Source: OAG 2012/2013, DLR 2012/2013

Fig. 2: Changes in the Global Air Transport Supply

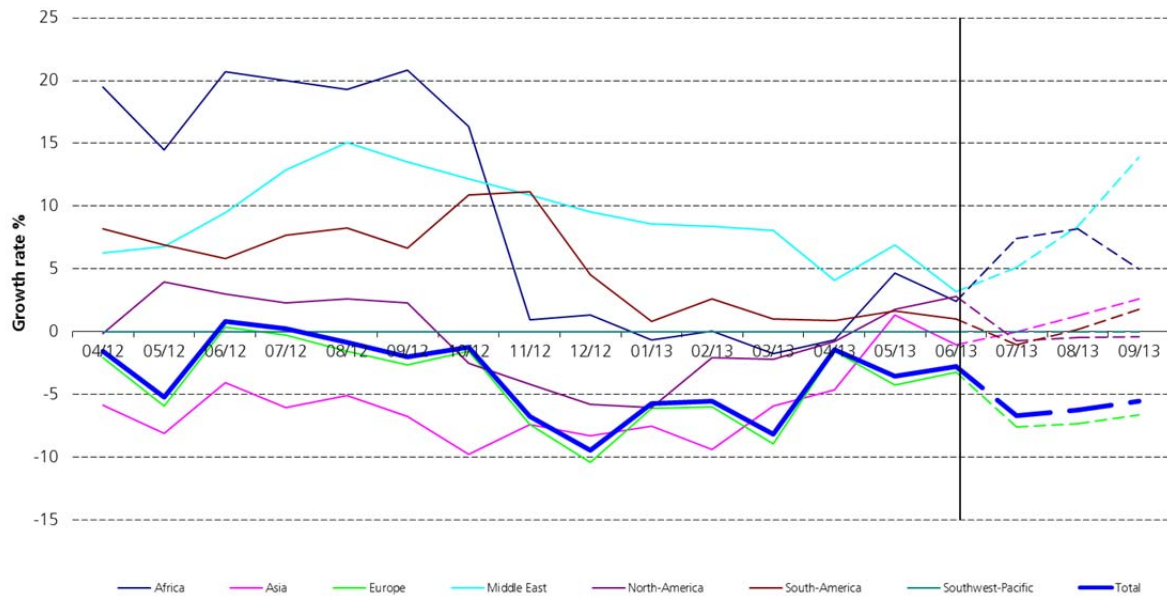
Development of the German Air Transport Supply



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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