Flughafenwesen und Luftverkehr

Global Aviation Monitor (GAM)

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

December 2010

DLR

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 2008: Nearly 30 M flights (non-stop) worldwide
- Air transport supply January – December 2009: 29.2 M flights (non-stop) worldwide
- Busiest month 2009: July with 2.6 M flights; 2010 until now: July with 2,74 M flights
- Air traffic showed downward trend since April 2008, with a turnaround in December 2009
- Forecasting methodology: Time series analysis

Analysis: January 2010 – December 2010

Global

- December 2010: 2.50 M flights supplied
- More than 9% decline in February 2009, 3% decline in July 2009, 0% in November, turnaround with 1% increase in December 2009, more than 3% growth in February and around 4,9% in December compared to 2009
- Airports: Traffic growth at most airports worldwide; more and more large US airports show a rise; strong growth at Mexico and Tokyo airport
- Airlines: 6 out of the 10 biggest airlines are from USA, all of them now with increasing no. of flights offered; growth of chinese airlines, strong growth of Delta Airlines because of merger with former Northwest, TAM and Easyjet

World Regions, Europe

- Increase of traffic worldwide since December 2009; increase in Europe, small increase in North America, already strong growth in Asia and Middle East, but with downwards tendency
- Airports: Increase in air transport supply at most European airports; with strong increase at e.g. Moscow, Copenhagen and Berlin-Tegel, however decline at Helsinki and Gatwick
- Airlines: Small increase of flights of some legacy carriers, except e.g. Alitalia and Finnair with strong growth, some growth in the low cost segment

Germany

- Airports: Heterogeneous traffic developments; some larger airports, e.g. BER show a rise, some small airports with decrease air transport supply
- Airlines: Heterogeneous developments of number of flights offered; still decline in the Low Cost carrier segment except easyjet, some growth in the legacy carrier segment

Outlook: January 2011 – March 2011

Global

- For the next months, a traffic growth of around 7% is expected. The model results in a more optimistic growth due to the rather unique and atypical backlog demand effects in 2010

World Regions, Europe

- Increase of around 7% in Europe is expected

Germany

- For the next month, a traffic growth of up to 4-6% is expected

Rank	Airport	12/2010	Growth rate
1	Atlanta Hartsfield-Jackson Intl	38.370	-2,3
2	Chicago O'Hare International	36.445	7,0
3	Dallas/Fort Worth Intl	26.427	-0,1
4	Denver Intl	25.756	3,0
5	Los Angeles International	22.616	1,6
6	Beijing Capital	22.150	3,2
7	Houston George Bush Intercontinental	22.027	-0,4
8	Charlotte	21.283	8,9
9	London Heathrow	19.287	2,5
10	Paris Charles de Gaulle	19.044	0,4
11	Frankfurt International	18.590	4,9
12	Detroit Wayne County	17.801	3,2
13	Philadelphia International	17.664	1,6
14	Madrid Barajas	17.232	0,2
15	New York J F Kennedy International	17.134	3,9
16	Phoenix Sky Harbor Intl .	16.883	0,4
17	Minneapolis International	16.668	5,4
18	Tokyo Haneda	16.243	12,3
19	Newark Liberty International	16.124	2,1
20	Mexico City Juarez International	15.763	15,1
21	Toronto Lester B Pearson Intl	15.429	3,9
22	Amsterdam	15.309	7,3
23	San Francisco International	15.145	3,0
24	New York La Guardia	15.076	4,0
25	Miami International	14.626	6,2

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

Rank	Airport	12/2010	Growth rate
1	Frankfurt International	18.590	4,9
2	Munich International	14.170	3,8
3	Dusseldorf International	7.463	2,2
4	Berlin Tegel	5.988	10,1
5	Hamburg	5.204	-1,5
6	Stuttgart	3.580	-2,3
7	Cologne/Bonn K.A.	3.342	-3,2
8	Berlin Schoenefeld	2.484	13,7
9	Hanover	1.944	11,1
10	Nuremberg	1.786	-2,5
11	Bremen	1.118	6,1
12	Frankfurt Hahn	972	-11,2
13	Leipzig/Halle	952	15,1
14	Dresden	909	1,3
15	Dusseldorf Niederrhein	735	8,4
16	Munster	622	0,2
17	Friedrichshafen	496	30,5
18	Dortmund	443	-4,9
19	Karlsruhe/Baden Baden	307	-12,5
20	Saarbrucken Ensheim	300	-15,5
21	Paderborn	255	13,8
22	Memmingen	194	-37,4
23	Westerland	117	37,6
24	Hamburg Luebeck	90	-46,4
25	Erfurt	70	-24,7

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

Rank	Airport	12/2010	Growth rate
1	London Heathrow	19.287	2,5
2	Paris Charles de Gaulle	19.044	0,4
3	Frankfurt International	18.590	4,9
4	Madrid Barajas	17.232	0,2
5	Amsterdam	15.309	7,3
6	Munich International	14.170	3,8
7	Rome Fiumicino	12.950	4,4
8	Barcelona	10.691	7,5
9	Istanbul Ataturk	10.619	2,8
10	Vienna	9.519	3,3
11	Zurich	9.459	4,9
12	Paris Orly	9.204	4,5
13	Moscow Domodedovo	8.847	24,7
14	Copenhagen	8.781	10,8
15	London Gatwick	8.596	-1,2
16	Brussels	7.937	7,7
17	Milan Malpensa	7.469	7,4
18	Dusseldorf International	7.463	2,2
19	Oslo	7.375	4,3
20	Moscow Sheremetyevo International	6.809	7,2
21	Stockholm Arlanda	6.678	8,2
22	Helsinki	6.316	6,7
23	Athens Intl Eleftherios Venizelos	6.248	-15,4
24	Berlin Tegel	5.988	10,1
25	Lisbon	5.533	6,0

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

Source: OAG 2009/10, DLR 2009/10

Rank	Airline	12/2010	Growth rate
1	Delta Air Lines	170.909	65,4
2	American Airlines	107.908	0,4
3	United Airlines	100.505	2,6
4	US Airways	96.127	1,9
5	Southwest Airlines	94.097	2,0
6	Continental Airlines	76.356	0,2
7	Lufthansa German Airlines	52.403	3,5
8	China Southern Airlines	46.077	4,9
9	Air Canada	45.145	6,1
10	Air France	42.611	-2,1
11	China Eastern Airlines	39.954	9,3
12	Ryanair	32.996	2,5
13	All Nippon Airways	32.368	4,1
14	Air China	30.847	6,0
15	easyJet	29.864	11,5
16	TAM Linhas Aereas	28.122	10,5
17	Gol Transportes Aereos	26.471	8,7
18	British Airways	24.420	4,1
19	Alaska Airlines	23.135	-4,1
20	Iberia	22.580	-1,0
21	AirTran Airways	22.201	1,8
22	Qantas Airways	21.520	6,2
23	Japan Airlines International	21.350	-8,7
24	JetBlue Airways Corporation	20.532	8,0
25	Turkish Airlines	20.250	4,4

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

Rank	Airline	12/2010	Growth rate
1	Lufthansa German Airlines	48.421	2,9
2	Air France	38.968	-2,5
3	Ryanair	32.409	2,0
4	easyJet	29.263	11,1
5	Iberia	21.272	-1,6
6	British Airways	19.411	4,0
7	Turkish Airlines	18.230	3,8
8	SAS Scandinavian Airlines	17.279	1,2
9	Air Berlin	15.710	-1,1
10	KLM-Royal Dutch Airlines	14.255	4,1
11	Alitalia	14.002	22,8
12	Flybe	12.879	7,3
13	Swiss	11.707	5,0
14	Austrian Airlines AG	10.456	-2,0
15	Wideroe's Flyveselskap	8.630	11,9
16	TAP Air Portugal	8.215	7,6
17	Norwegian Air Shuttle	8.074	14,8
18	Aeroflot Russian Airlines	7.170	7,9
19	Finnair	7.005	15,4
20	LOT - Polish Airlines	6.264	3,7
21	Vueling Airlines	6.223	-6,5
22	Brussels Airlines	6.181	18,8
23	Pegasus Airlines	6.022	51,0
24	Aer Lingus	5.950	4,7
25	Air Europa	5.039	2,2

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

Rank	Airline	12/2010	Growth rate
1	Lufthansa German Airlines	31.308	2,8
2	Air Berlin	10.112	-1,3
3	germanwings	3.420	-1,9
4	Ryanair	2.617	-5,2
5	easyJet	1.681	29,7
6	Air France	1.568	-2,9
7	KLM-Royal Dutch Airlines	1.173	0,3
8	Austrian Airlines AG	1.155	2,3
9	Swiss	1.112	4,0
10	British Airways	1.083	6,7
11	SAS Scandinavian Airlines	828	3,1
12	Condor Flugdienst	783	20,8
13	SunExpress	710	29,1
14	LOT - Polish Airlines	668	1,1
15	Turkish Airlines	625	-21,8
16	Cirrus Airlines	605	5,2
17	TUIfly	577	10,1
18	Luxair	576	-1,5
19	Intersky	496	12,0
20	Flybe	490	1,0
21	Iberia	422	11,6
22	Aeroflot Russian Airlines	378	-25,3
23	Aegean Airlines	332	0,0
24	Czech Airlines	327	-17,8
25	Brussels Airlines	326	32,0

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

Source: OAG 2009/10, DLR 2009/10

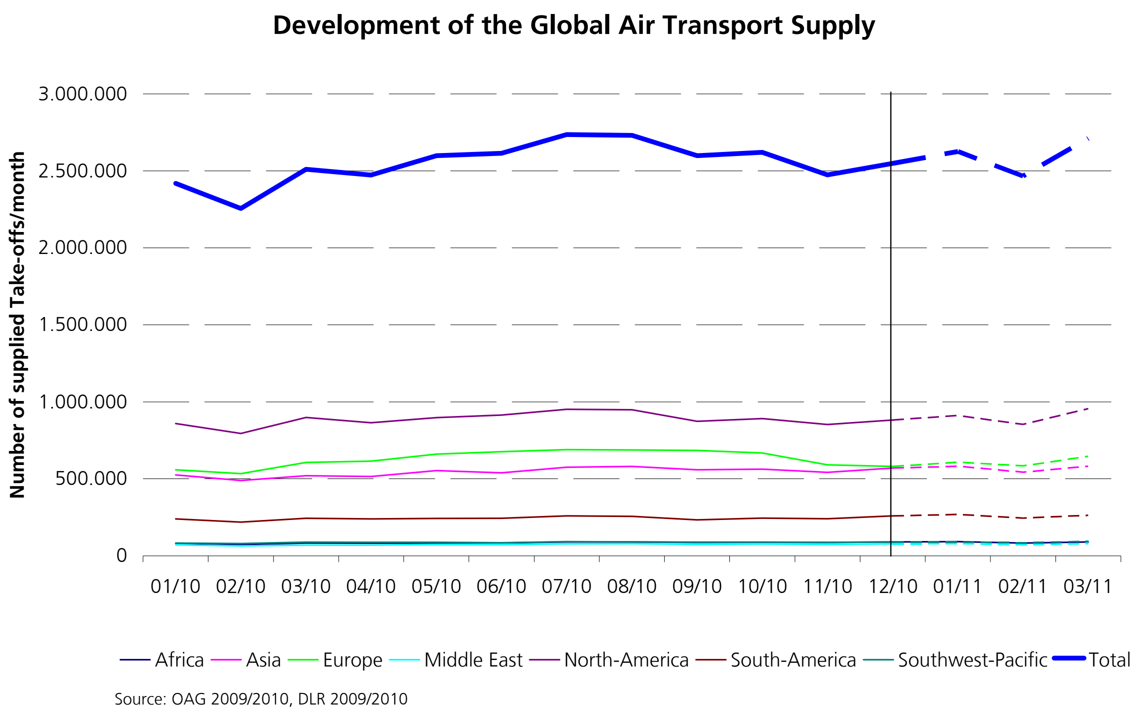

Fig. 1: Development of the Global Air Transport Supply

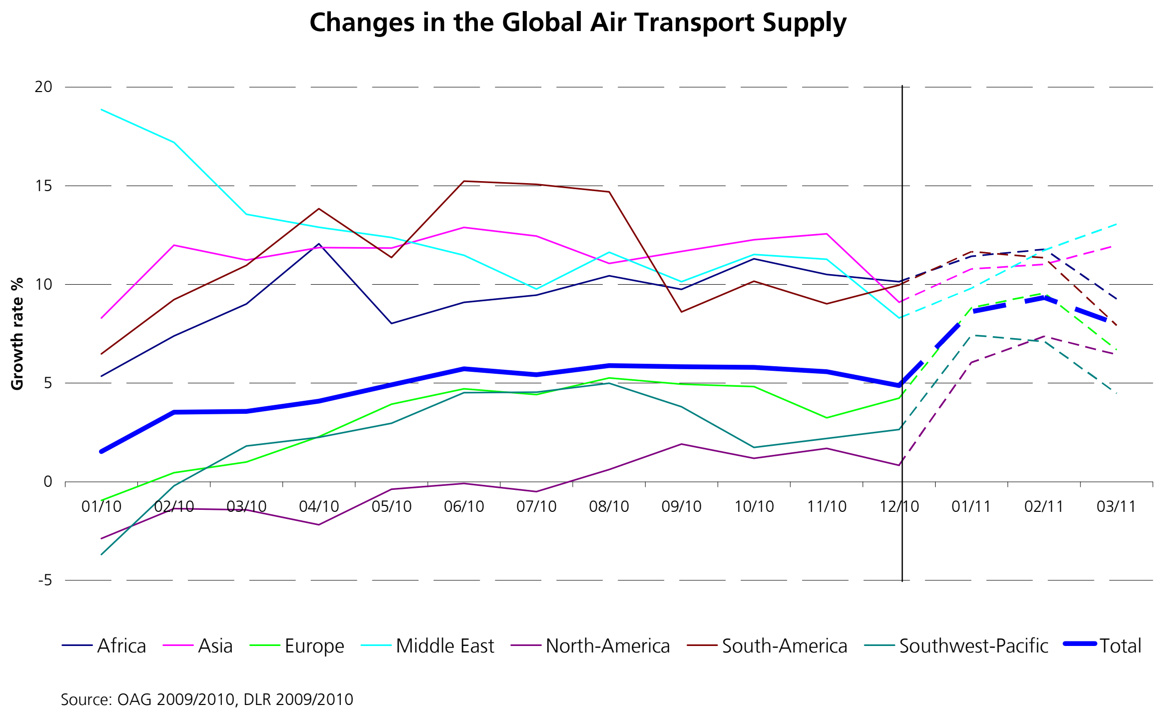

Fig. 2: Changes in the Global Air Transport Supply

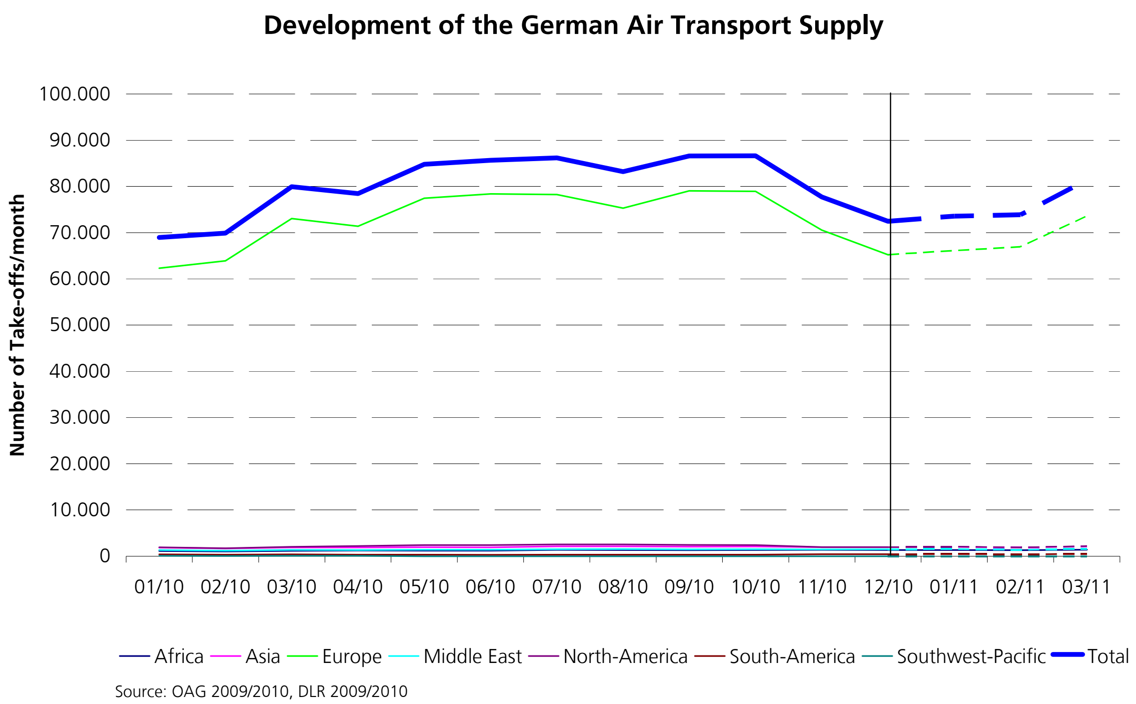

Fig. 3: Development of the German Air Transport Supply

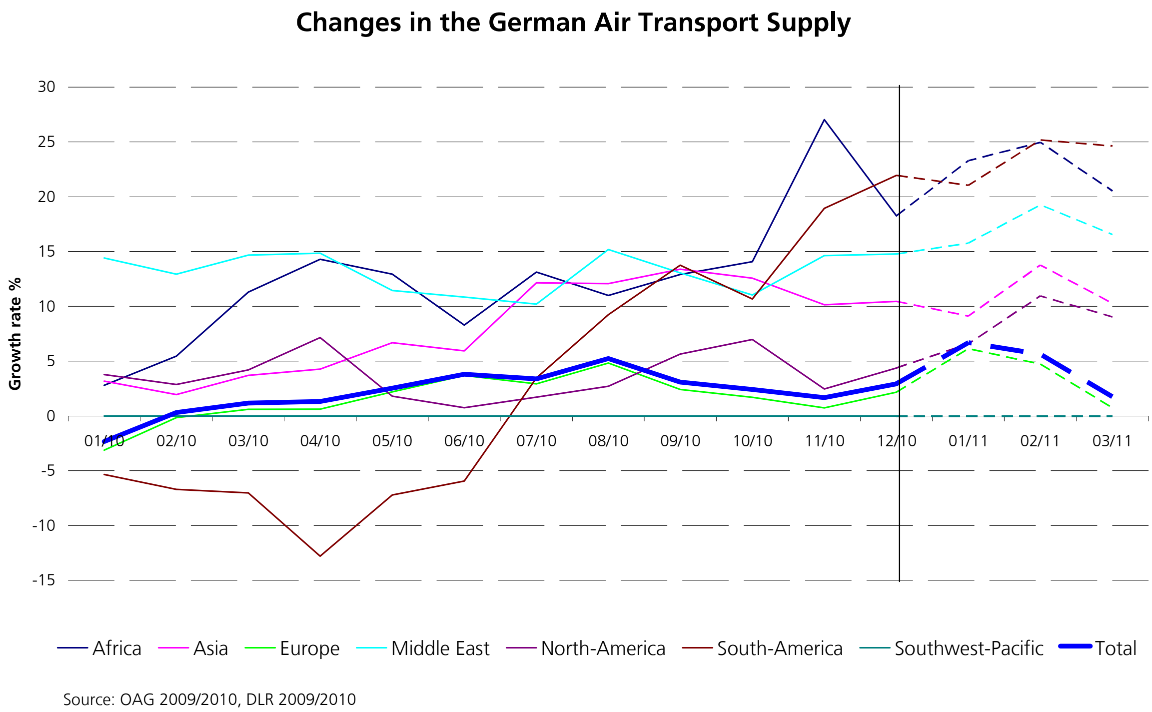

Fig. 4: Changes in the German Air Transport Supply

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