

Global Aviation Monitor (GAM)

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

June 2009



Main Results of Global Air Transport Supply Analyses and Outlook

Background:

- Covers about 3.500 airports worldwide
- Covers about 850 airlines worldwide
- Air transport supply in 2008: Nearly 30 M flights (nonstop) worldwide
- Busiest month: July 2008 with 2.7 M flights
- Air traffic trends downwards since April 2008
- Forecasting methodology: Time series analysis

Analysis: July 2008 – June 2009

Global

- June 2009: 2.47 M flights supplied
- More than 6% decline in April and 4% decline in June 2009 compared to 2008
- Airports: Huge decline in the USA, increase at Beijing airport
- Airlines: 7 out of the 10 biggest airlines are from USA, with decreasing no. of flights offered

World Regions, Europe

- Largest decline worldwide in North America, reverse tendency in Middle East
- Airports: Decline of air transport supply at numerous airports, increase at Istanbul Airport
- Airlines: Large decline of flights of legacy carriers, e.g. British Airways, some growth in the low cost segment, e.g. Ryanair

Germany

- Decline of the no. of flights offered of nearly 8%
- Airports: General tendency downwards, however, Niederrhein airport grows by 70%
- Airlines: General tendency of supply downwards, however, some growth in the low-cost segment, e.g. Ryanair

Outlook: July – September 2009

Global

- For the next months a further decrease of 5% to 7% expected

World Regions, Europe

- Largest decreases expected in Europe, reverse tendency in Middle East

Germany

- Further decrease of the no. of flights offered of about 8-10% is expected

Rank	Airport	06/2009	Growth rate
1	Atlanta Hartsfield-jackson Intl Apt	42.008	3,1
2	Chicago O'Hare International Apt	35.045	-8,8
3	Dallas/Fort Worth Intl Apt	26.238	-4,0
4	Denver Intl Apt	25.920	-1,4
5	Los Angeles International Apt	22.016	-14,4
6	Houston George Bush Intercontinental Ap	22.003	-9,7
7	Paris Charles de Gaulle Apt	20.986	-5,0
8	Beijing Capital Apt	20.297	7,4
9	London Heathrow Apt	19.766	-2,0
10	Charlotte	19.632	-4,3
11	Frankfurt International Apt	19.387	-3,4
12	Philadelphia International Apt	18.773	-2,0
13	New York J F Kennedy International Apt	18.348	-2,4
14	Madrid Barajas Apt	18.282	-7,1
15	Detroit Wayne County	18.220	-5,3
16	Minneapolis International Apt	18.088	2,9
17	Newark Liberty International Apt	16.755	-7,6
18	Amsterdam	16.500	-7,0
19	Phoenix Sky Harbor Intl Apt.	16.314	-10,3
20	Munich International Airport	16.156	-9,2
21	Toronto Lester B Pearson Intl Apt	15.802	-5,2
22	San Francisco International Apt	15.450	-1,0
23	New York La Guardia Apt	15.244	-6,8
24	Boston Logan International Apt	14.447	-4,1
25	Seattle/Tacoma International Apt	14.228	-10,2

Tab. 1: Number of monthly Take-off's at the biggest Airports in the World

Rank	Airport	06/2009	Growth rate
1	Frankfurt International Apt	19.387	-3,4
2	Munich International Airport	16.156	-9,2
3	Dusseldorf International Airport	8.845	-5,8
4	Berlin Tegel Apt	6.246	-5,1
5	Hamburg Airport	5.801	-13,8
6	Stuttgart Airport	4.913	-11,6
7	Cologne/Bonn K.A. Apt	4.309	-7,5
8	Hanover	2.549	-10,9
9	Berlin Schoenefeld Apt	2.287	-4,3
10	Nuremberg Apt	1.891	-6,5
11	Frankfurt Hahn Airport	1.397	-7,2
12	Bremen	1.195	-9,1
13	Leipzig/Halle	1.054	8,5
14	Dresden	1.043	-11,5
15	Munster	801	-7,4
16	Dusseldorf Niederrhein Airport	735	72,5
17	Dortmund	524	-45,5
18	Friedrichshafen	504	-11,1
19	Saarbrücken Ensheim Airport	476	-12,0
20	Paderborn	427	-17,7
21	Karlsruhe/Baden Baden	425	2,4
22	Memmingen	368	83,1
23	Hamburg Luebeck Airport	240	29,7
24	Westerland	191	-12,0
25	Saarbrücken Zweibrücken Airport	139	23,0

Tab. 3: Number of monthly Take-off's at the biggest Airports in Germany

Rank	Airport	06/2009	Growth rate
1	Paris Charles de Gaulle Apt	20.986	-5,0
2	London Heathrow Apt	19.766	-2,0
3	Frankfurt International Apt	19.387	-3,4
4	Madrid Barajas Apt	18.282	-7,1
5	Amsterdam	16.500	-7,0
6	Munich International Airport	16.156	-9,2
7	Rome Fiumicino Apt	13.813	-7,2
8	Barcelona Apt	11.682	-8,6
9	Vienna	10.379	-6,8
10	Istanbul Ataturk Airport	10.363	12,3
11	London Gatwick Apt	10.361	-2,3
12	Copenhagen Apt	9.709	-12,3
13	Paris Orly Apt	9.642	-2,8
14	Zurich Airport	9.410	-2,9
15	Brussels Airport	8.987	-8,5
16	Dusseldorf International Airport	8.845	-5,8
17	Athens Intl Eleftherios Venizelos Apt	8.362	6,9
18	Oslo Airport	8.355	-12,9
19	Palma Mallorca	7.764	2,1
20	Stockholm Arlanda Apt	7.464	-19,5
21	Milan Malpensa Apt	7.406	-2,6
22	Moscow Domodedovo Apt	6.998	-3,8
23	Manchester International Apt	6.750	-12,8
24	Dublin	6.728	-16,2
25	Nice	6.667	-17,0

Tab. 2: Number of monthly Take-off's on the biggest Airports in Europe

Source: OAG 2008/09, DLR 2008/09

Rank	Airline	06/2009	Growth rate
1	Delta Air Lines	114.484	-4,4
2	American Airlines	106.181	-12,5
3	United Airlines	101.909	-4,8
4	US Airways	98.427	-8,8
5	Southwest Airlines	96.195	-4,7
6	Continental Airlines	77.714	-14,4
7	Northwest Airlines	74.292	-3,0
8	Lufthansa German Airlines	58.506	-6,6
9	Air France	48.063	-5,6
10	Air Canada	45.753	-3,8
11	China Southern Airlines	42.018	5,4
12	Ryanair	36.067	11,2
13	China Eastern Airlines	35.346	12,6
14	easyJet	30.632	11,3
15	All Nippon Airways	29.410	-1,2
16	Air China	27.398	5,4
17	TAM Linhas Aereas	26.970	11,6
18	Iberia	26.781	-5,5
19	British Airways	26.165	-12,3
20	Alaska Airlines	25.245	-14,4
21	SAS Scandinavian Airlines	23.337	-15,4
22	Japan Airlines International	23.147	-3,5
23	Gol Transportes Aereos	22.926	24,8
24	AirTran Airways	22.278	-4,6
25	Qantas Airways	20.461	-7,6

Tab. 4: Number of monthly Take-off's by the biggest Airlines in the World

Rank	Airline	06/2009	Growth rate
1	Lufthansa German Airlines	34.916	-9,6
2	Air Berlin	10.732	-6,9
3	germanwings	3.752	-7,1
4	TUIfly	3.713	-11,9
5	Ryanair	3.212	22,3
6	Air France	1.825	-5,3
7	Condor Flugdienst	1.457	-9,6
8	KLM-Royal Dutch Airlines	1.399	2,0
9	easyJet	1.332	-18,6
10	Austrian Airlines AG	1.263	-3,8
11	British Airways	1.233	6,9
12	SAS Scandinavian Airlines	1.181	-11,5
13	Swiss	994	-1,3
14	Cirrus Airlines	802	-22,2
15	Turkish Airlines	786	1,7
16	LOT - Polish Airlines	702	-11,3
17	Luxair	624	8,3
18	Flybe	563	0,4
19	Intersky	555	-19,3
20	Czech Airlines	453	2,7
21	Aeroflot Russian Airlines	451	-3,2
22	Iberia	415	-6,7
23	OLT Ostfriesische Lufttransport GmbH	357	-71,6
24	SunExpress	328	37,2
25	Brussels Airlines	326	-3,0

Tab. 6: Number of monthly Take-off's by the biggest Airlines in Germany

Rank	Airline	06/2009	Growth rate
1	Lufthansa German Airlines	54.584	-6,7
2	Air France	44.185	-5,9
3	Ryanair	35.875	11,0
4	easyJet	30.332	11,0
5	Iberia	25.702	-5,7
6	SAS Scandinavian Airlines	23.087	-15,4
7	British Airways	21.363	-14,6
8	Air Berlin	17.847	-4,4
9	Turkish Airlines	16.515	11,1
10	KLM-Royal Dutch Airlines	15.933	-6,9
11	Flybe	15.206	8,9
12	Alitalia	13.109	-19,1
13	Austrian Airlines AG	11.941	-8,4
14	Swiss	10.954	2,9
15	Wideroe's Flyveselskap	8.582	-4,6
16	Norwegian Air Shuttle	8.012	11,1
17	Olympic Airlines	7.463	-2,6
18	TAP Air Portugal	7.395	-13,5
19	Finnair	6.636	-2,1
20	Czech Airlines	6.601	-0,8
21	TUIfly	6.547	-11,3
22	LOT - Polish Airlines	6.543	-5,5
23	Aer Lingus	6.541	6,6
24	Spanair	6.532	-31,8
25	Aeroflot Russian Airlines	6.461	-13,6

Tab. 5: Number of monthly Take-off's by the biggest Airlines in Europe

Source: OAG 2008/09, DLR 2008/09

Development of the Global Air Transport Supply

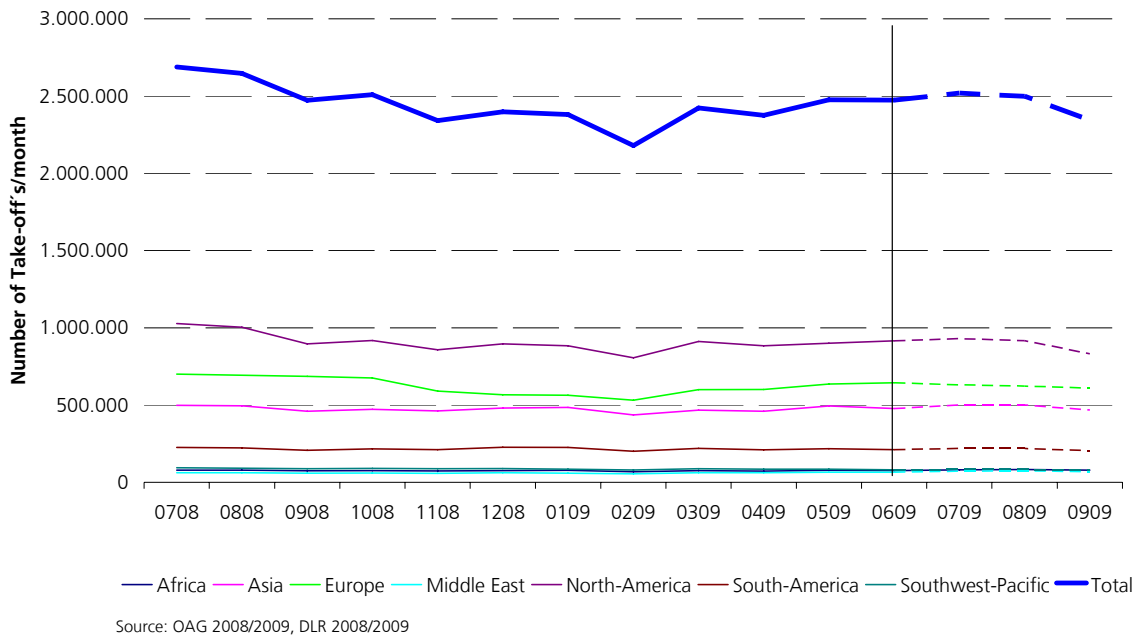


Fig. 1: Development of the Global Air Transport Supply

Changes in the Global Air Transport Supply

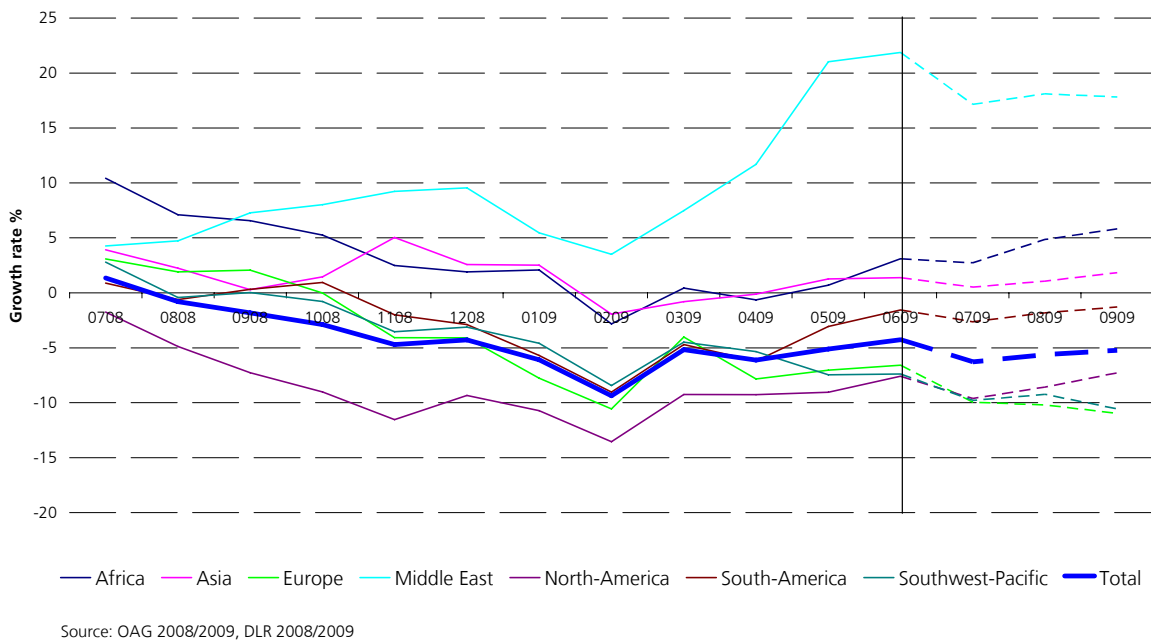


Fig. 2: Changes in the Global Air Transport Supply

Development of the German Air Transport Supply

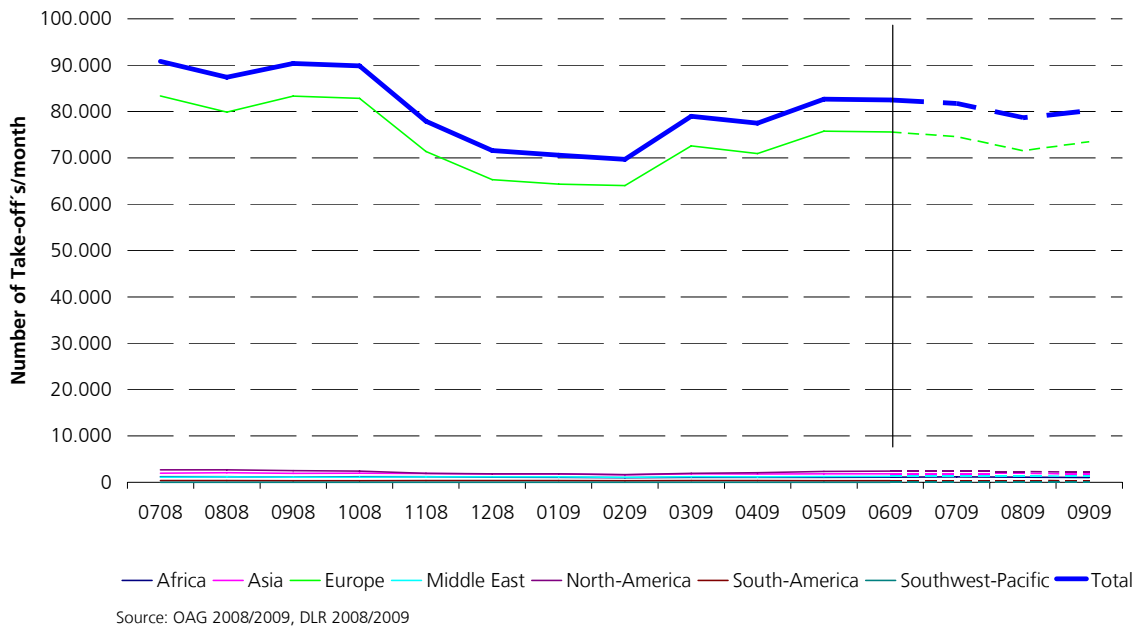


Fig. 3: Development of the German Air Transport Supply

Changes in the German Air Transport Supply

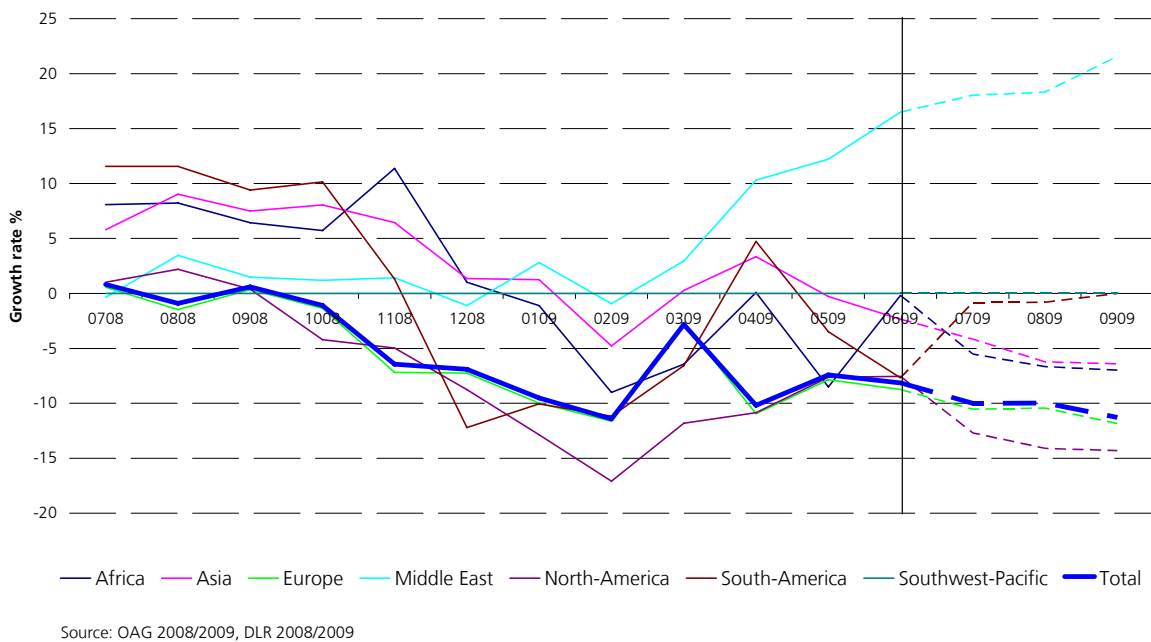


Fig. 4: Changes in the German Air Transport Supply

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