

Global Aviation Monitor (GAM)

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

September 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: July with 2.91 M flights
- Air traffic showed small growth rates since April 2013
- Forecasting methodology: Time series analysis

Analysis: October 2012 – September 2013

Global

- September 2013: 2.72 M flights supplied (+2.2%)
- 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 Istanbul
- Airlines: Heterogeneous development of no. of flights offered; strong growth of Turkish Airways; some growth in the low cost segment e.g. Azul (Brasil)

World Regions, Europe

- Overall stagnation of traffic worldwide in analyses year Oct. 2012 – Sep. 2013; however, small increase since April 2013; in Europe, small traffic increase since July 2013; in Asia continued growth
- Airports: Heterogeneous developments of no. of flights offered; strong increase at Moscow and Istanbul, however decline at some airports e.g. Madrid
- Airlines: Heterogeneous developments of flights, some airlines e.g. Turkish Airways and Aeroflot with strong growth, some growth in the low cost segment e.g. Norwegian, Wizz, germanwings and Vueling (former Lufthansa flights in Germany and Europe are now operated by germanwings with exception from Frankfurt and Munich), 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 Schonefeld 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

Outlook: October 2013 – December 2013

Global

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

World Regions, Europe

- A small increase of traffic growth in Europe is expected

Germany

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

Rank	Airport	09/2013	Growth rate
1	Chicago O'Hare International	36.888	2,6
2	Atlanta Hartsfield-Jackson Intl	35.704	-2,3
3	Dallas/Fort Worth Intl	26.943	3,7
4	Beijing Capital	24.237	2,8
5	Los Angeles International	24.047	4,8
6	Denver Intl	23.410	-3,1
7	Frankfurt International	20.628	-1,4
8	Charlotte	20.191	0,6
9	London Heathrow	20.172	1,7
10	Paris Charles de Gaulle	19.035	-2,2
11	Houston George Bush Intercontinental	18.957	2,8
12	Amsterdam	18.419	4,6
13	Tokyo Haneda	16.983	4,4
14	Jakarta Soekarno-Hatta	16.910	4,6
15	San Francisco International	16.858	1,2
16	Detroit Wayne County	16.840	1,0
17	Istanbul Ataturk	16.704	9,4
18	Toronto Lester B Pearson Intl	16.538	-0,9
19	Guangzhou	16.362	6,0
20	New York J F Kennedy International	16.217	-1,2
21	Shanghai Pudong International	16.132	3,1
22	Minneapolis International	16.092	2,9
23	Munich International	16.069	-2,2
24	Philadelphia International	15.995	-4,7
25	Newark Liberty International	15.818	1,0

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

Rank	Airport	09/2013	Growth rate
1	Frankfurt International	20.628	-1,4
2	Munich International	16.069	-2,2
3	Dusseldorf International	9.261	1,1
4	Berlin Tegel	7.592	0,9
5	Hamburg	5.700	-3,7
6	Stuttgart	4.356	-3,0
7	Cologne/Bonn K.A.	3.963	-0,8
8	Hanover	2.303	-4,2
9	Berlin Schoenefeld	2.124	-13,2
10	Nuremberg	1.803	3,9
11	Bremen	1.130	-4,5
12	Leipzig/Halle	1.068	11,1
13	Frankfurt Hahn	935	-5,6
14	Dusseldorf Niederrhein	878	13,1
15	Dresden	811	-12,9
16	Dortmund	667	7,1
17	Karlsruhe/Baden Baden	428	-17,5
18	Munster	408	-22,7
19	Memmingen	320	-17,9
20	Paderborn	319	10,8
21	Friedrichshafen	318	-21,3
22	Saarbrücken Ensheim	282	6,0
23	Westerland	191	6,1
24	Hamburg Luebeck	132	6,5
25	Saarbrücken Zweibrücken	93	16,3

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

Rank	Airport	09/2013	Growth rate
1	Frankfurt International	20.628	-1,4
2	London Heathrow	20.172	1,7
3	Paris Charles de Gaulle	19.035	-2,2
4	Amsterdam	18.419	4,6
5	Istanbul Ataturk	16.704	9,4
6	Munich International	16.069	-2,2
7	Madrid Barajas	13.805	-12,9
8	Rome Fiumicino	13.488	-5,5
9	Barcelona	12.075	-5,9
10	London Gatwick	11.489	3,5
11	Copenhagen	10.443	7,0
12	Paris Orly	10.383	1,1
13	Moscow Domodedovo	10.229	-1,7
14	Vienna	10.143	-5,1
15	Oslo	10.102	6,3
16	Zurich	9.973	-0,2
17	Moscow Sheremetyevo International	9.740	10,0
18	Stockholm Arlanda	9.351	9,3
19	Dusseldorf International	9.261	1,1
20	Palma Mallorca	8.497	-0,2
21	Brussels	8.343	-2,7
22	Manchester International	7.617	4,1
23	Berlin Tegel	7.592	0,9
24	Dublin	7.098	7,2
25	Helsinki	6.891	3,5

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

Source: OAG 2012/13, DLR 2012/13

Rank	Airline	09/2013	Growth rate
1	United Airlines	157.964	-1,4
2	Delta Air Lines	153.352	-0,6
3	American Airlines	102.616	1,6
4	Southwest Airlines	89.994	0,1
5	US Airways	87.341	-0,8
6	China Southern Airlines	56.504	6,3
7	Lufthansa German Airlines	56.106	-7,1
8	Ryanair	50.514	2,4
9	China Eastern Airlines	47.775	2,3
10	Air Canada	46.313	-2,0
11	easyJet	39.287	2,8
12	Air France	35.105	-21,6
13	Air China	34.265	6,7
14	Turkish Airlines	33.979	22,0
15	All Nippon Airways	33.814	0,0
16	British Airways	30.401	3,6
17	SAS Scandinavian Airlines	27.366	13,8
18	Lion Air	25.683	23,5
19	Gol Transportes Aereos	25.478	3,8
20	Alaska Airlines	24.863	4,2
21	Qantas Airways	22.956	1,4
22	Azul	22.793	107,7
23	TAM Linhas Aereas	22.759	-6,8
24	Japan Airlines International	21.700	4,4
25	JetBlue Airways Corporation	21.693	2,9

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

Rank	Airline	09/2013	Growth rate
1	Lufthansa German Airlines	33.779	-7,7
2	Air Berlin	12.030	-2,1
3	germanwings	5.253	24,3
4	Ryanair	3.088	11,2
5	easyJet	1.849	3,5
6	Condor Flugdienst	1.783	0,3
7	Air France	1.457	-10,8
8	TUIfly	1.421	-11,4
9	KLM-Royal Dutch Airlines	1.417	0,5
10	British Airways	1.340	18,4
11	Turkish Airlines	1.224	15,4
12	SAS Scandinavian Airlines	1.059	0,7
13	Swiss	1.028	-5,3
14	Austrian Airlines AG	844	1,3
15	LOT - Polish Airlines	658	-3,2
16	SunExpress	578	2,8
17	Aeroflot Russian Airlines	528	0,6
18	Luxair	472	1,9
19	United Airlines	450	-9,3
20	Air Dolomiti	444	484,2
21	Intersky	443	0,0
22	Vueling Airlines	396	165,8
23	Wizz Air	363	4,6
24	Emirates	327	-1,2
25	Brussels Airlines	304	-7,0

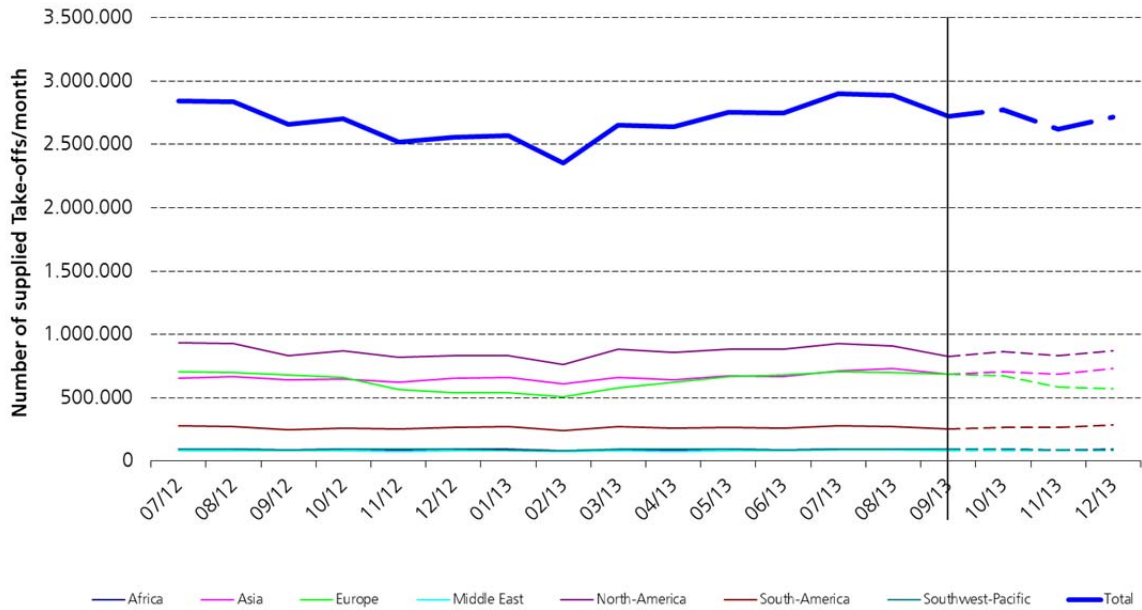
Tab. 6: Number of monthly Take-offs by the biggest Airlines in Germany

Rank	Airline	09/2013	Growth rate
1	Lufthansa German Airlines	51.704	-7,7
2	Ryanair	49.739	1,8
3	easyJet	38.764	2,6
4	Air France	31.469	-23,4
5	Turkish Airlines	30.022	21,5
6	SAS Scandinavian Airlines	27.052	13,9
7	British Airways	24.949	2,5
8	Air Berlin	19.737	-1,6
9	KLM-Royal Dutch Airlines	17.479	2,5
10	Flybe	15.735	-2,4
11	Norwegian Air Shuttle	14.581	15,6
12	Iberia	14.370	-21,7
13	Alitalia	14.140	-13,0
14	Aeroflot Russian Airlines	13.755	21,0
15	Vueling Airlines	12.219	8,4
16	Swiss	11.722	-2,2
17	Wideroe's Flyveselskap	11.395	7,1
18	Austrian Airlines AG	10.683	-2,1
19	Pegasus Airlines	9.851	23,9
20	TAP Air Portugal	8.906	0,0
21	HOP!	8.854	650,3
22	Aer Lingus	8.570	1,5
23	Finnair	8.042	7,5
24	germanwings	7.961	17,7
25	Wizz Air	7.379	3,9

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

Source: OAG 2012/13, DLR 2012/13

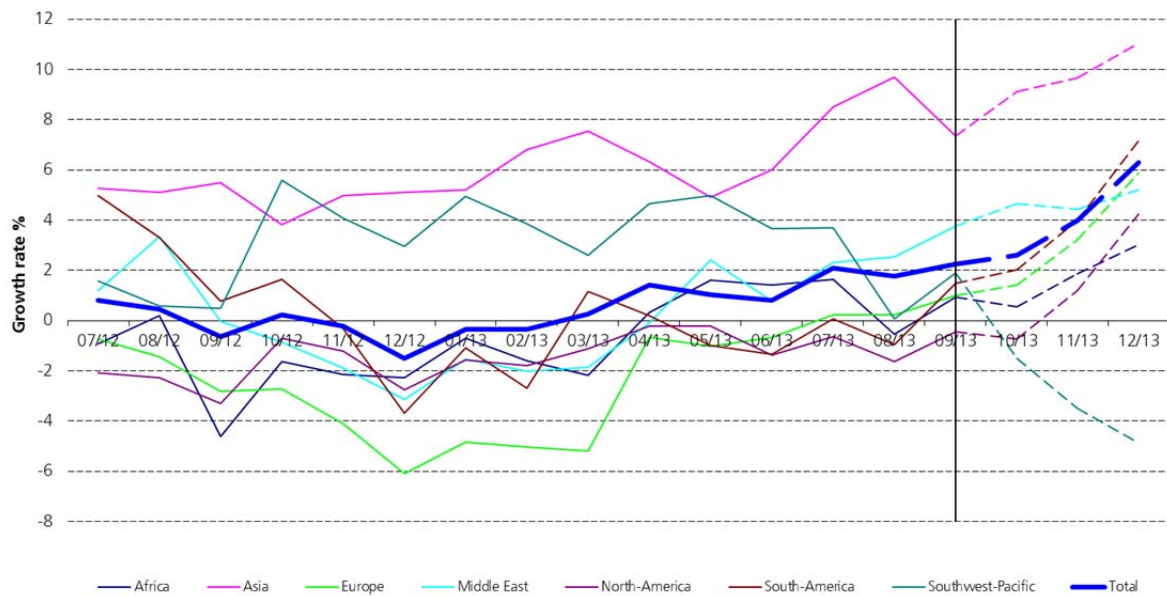
Development of the Global Air Transport Supply



Source: OAG 2012/2013, DLR 2012/2013

Fig. 1: Development of the Global Air Transport Supply

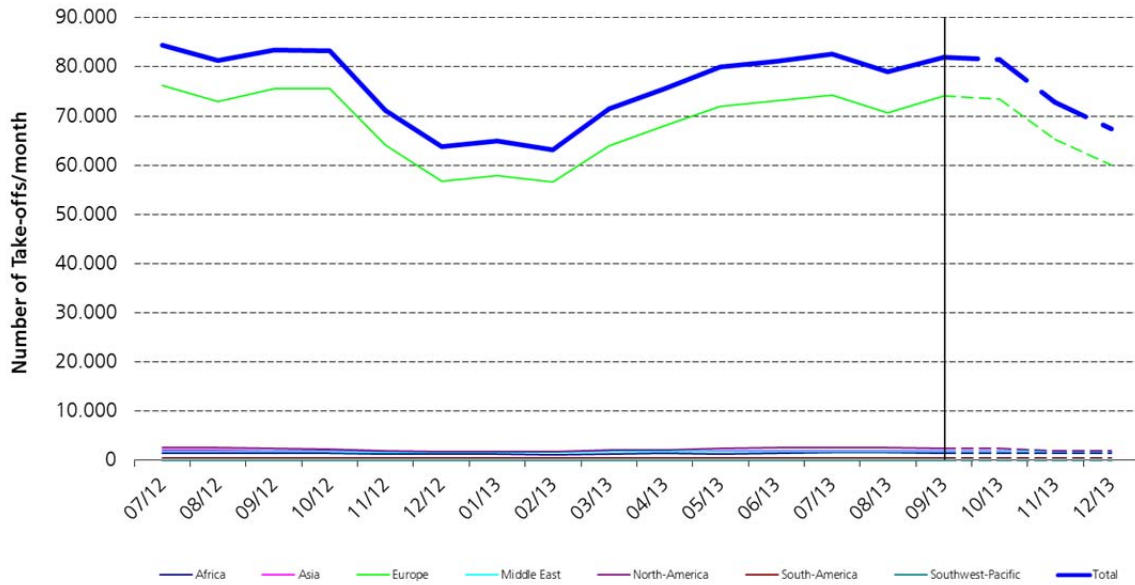
Changes in the Global Air Transport Supply



Source: OAG 2012/2013, DLR 2012/2013

Fig. 2: Changes in the Global Air Transport Supply

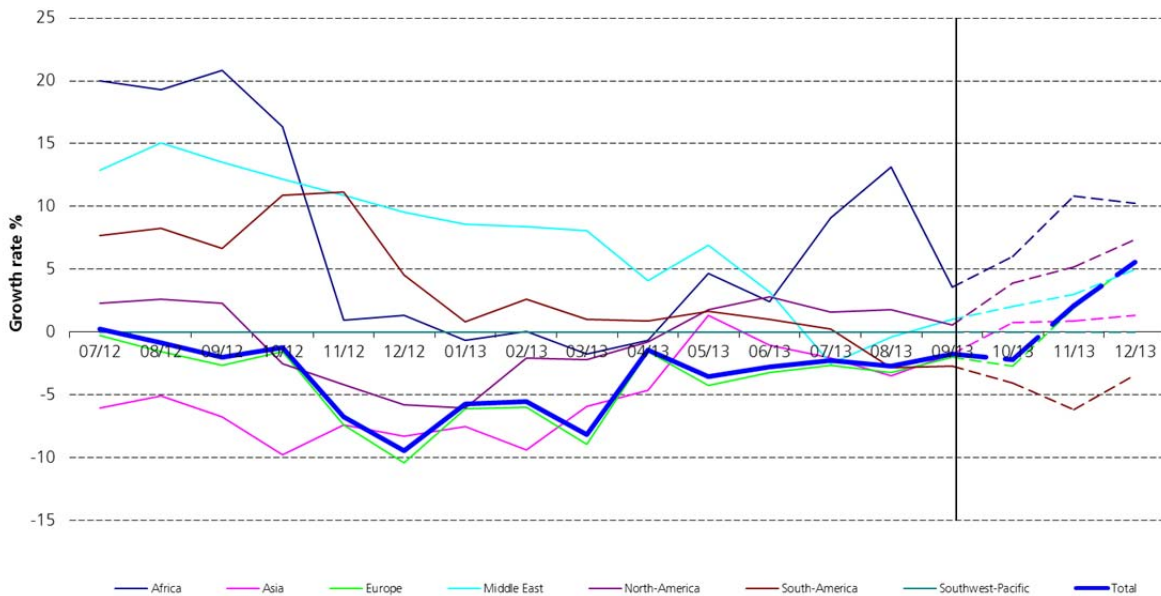
Development of the German Air Transport Supply



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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