

# Global Aviation Monitor (GAM)

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

December 2013



## Main Results of Global Air Transport Supply Analysis and Outlook

### Background:

- Covers about 3,500 airports worldwide
- Covers about 850 airlines worldwide
- Air transport supply of 2013: Nearly 32.3 M flights (non-stop) worldwide, new record value
- Busiest month 2013: July with 2.90 M flights
- Air traffic increases slowly since April 2013
- Forecasting methodology: Time series analysis

### Analysis: January 2013 – December 2013

#### Global

- December 2013: 2.47 M flights supplied (+3.5%)
- 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 (+10%)
- 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 Jan. 2013 – Dec. 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 except at 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. Dortmund, with traffic growth; most bigger German airports, e.g. Stuttgart or Schonefeld, with downward trend
- Airlines: Heterogeneous developments of number of flights offered; strong growth of germanwings, some airlines with decreasing traffic; former codeshare flights (with Lufthansa) are now operated only by Air Dolomiti;

### Outlook: January 2014 – March 2014

#### Global

- For the next few months, traffic growth of around 5% is expected

#### World Regions, Europe

- An increase of traffic growth in Europe of around 5% is expected

#### Germany

- For the next few month, small traffic growth is expected

Rank	Airport	12/2013	Growth rate
1	Atlanta Hartsfield-Jackson Intl	35.932	-0,7
2	Chicago O'Hare International	34.798	3,1
3	Dallas/Fort Worth Intl	27.807	4,1
4	Los Angeles International	24.872	7,4
5	Beijing Capital	24.351	1,5
6	Denver Intl	23.617	-3,9
7	Charlotte	21.870	2,0
8	Houston George Bush Intercontinental	20.077	1,1
9	London Heathrow	18.637	-1,6
10	Jakarta Soekarno-Hatta	17.336	1,0
11	Paris Charles de Gaulle	17.157	-4,7
12	Tokyo Haneda	16.962	1,3
13	Frankfurt International	16.914	-1,9
14	Guangzhou	16.657	4,8
15	San Francisco International	16.591	3,9
16	New York J F Kennedy International	16.470	0,3
17	Newark Liberty International	16.351	0,8
18	Phoenix Sky Harbor Intl .	16.175	0,0
19	Istanbul Ataturk	16.163	10,3
20	Philadelphia International	16.111	-5,0
21	Toronto Lester B Pearson Intl	15.931	-0,4
22	Hong Kong International	15.917	7,1
23	Minneapolis International	15.852	2,9
24	Detroit Wayne County	15.830	1,0
25	Amsterdam	15.784	4,4

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

Rank	Airport	12/2013	Growth rate
1	Frankfurt International	16.914	-1,9
2	Munich International	13.027	-1,9
3	Dusseldorf International	6.522	-3,7
4	Berlin Tegel	6.304	6,1
5	Hamburg	4.611	4,5
6	Stuttgart	3.007	-4,8
7	Cologne/Bonn K.A.	2.730	3,2
8	Berlin Schoenefeld	1.845	-1,8
9	Hanover	1.676	-4,9
10	Nuremberg	1.358	-9,5
11	Bremen	905	-0,5
12	Leipzig/Halle	698	12,2
13	Dresden	604	-12,6
14	Frankfurt Hahn	556	-9,0
15	Dortmund	481	24,9
16	Dusseldorf Niederrhein	407	-3,8
17	Munster	262	8,3
18	Friedrichshafen	233	-28,3
19	Karlsruhe/Baden Baden	222	16,2
20	Saarbrücken Ensheim	201	-24,7
21	Paderborn	172	12,4
22	Memmingen	151	-16,6
23	Hamburg Luebeck	58	-15,9
24	Rostock-Laage	35	-5,4
25	Augsburg	32	0,0

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

Rank	Airport	12/2013	Growth rate
1	London Heathrow	18.637	-1,6
2	Paris Charles de Gaulle	17.157	-4,7
3	Frankfurt International	16.914	-1,9
4	Istanbul Ataturk	16.163	10,3
5	Amsterdam	15.784	4,4
6	Munich International	13.027	-1,9
7	Madrid Barajas	12.551	-8,1
8	Rome Fiumicino	10.960	-1,3
9	Moscow Domodedovo	9.800	6,8
10	Moscow Sheremetyevo International	9.390	14,6
11	Barcelona	9.244	-0,4
12	Paris Orly	9.055	-3,0
13	Vienna	8.603	-3,2
14	London Gatwick	8.594	6,7
15	Zurich	8.536	-5,7
16	Copenhagen	8.399	6,5
17	Oslo	8.167	7,3
18	Stockholm Arlanda	7.413	8,1
19	Brussels	6.811	0,9
20	Dusseldorf International	6.522	-3,7
21	Berlin Tegel	6.304	6,1
22	Dublin	5.876	11,0
23	Milan Malpensa	5.866	-3,1
24	Istanbul Sabiha Gokcen	5.654	63,5
25	Helsinki	5.627	0,1

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

Source: OAG 2012/13, DLR 2012/13

Rank	Airline	12/2013	Growth rate
1	United Airlines	158.812	-1,0
2	Delta Air Lines	147.573	1,5
3	American Airlines	108.692	2,0
4	Southwest Airlines	94.902	2,7
5	US Airways	91.986	-0,8
6	China Southern Airlines	54.390	7,2
7	China Eastern Airlines	48.064	9,4
8	Air Canada	45.228	-0,5
9	Lufthansa German Airlines	43.661	-9,5
10	All Nippon Airways	34.272	2,1
11	Air China	33.674	4,8
12	Ryanair	32.487	8,3
13	Turkish Airlines	32.373	22,5
14	Air France	31.822	-22,8
15	easyJet	31.604	3,8
16	Gol Transportes Aereos	28.144	10,4
17	British Airways	26.888	-4,1
18	Lion Air	25.908	13,4
19	Alaska Airlines	25.755	4,6
20	JetBlue Airways Corporation	25.493	8,5
21	Azul	24.552	119,8
22	TAM Linhas Aereas	23.692	-7,7
23	Qantas Airways	22.915	2,5
24	Japan Airlines International	22.298	4,4
25	SAS Scandinavian Airlines	20.389	2,5

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

Rank	Airline	12/2013	Growth rate
1	Lufthansa German Airlines	26.476	-10,1
2	Air Berlin	8.272	7,4
3	germanwings	4.707	69,1
4	easyJet	1.681	5,3
5	Ryanair	1.616	10,2
6	Air France	1.308	-14,0
7	KLM-Royal Dutch Airlines	1.226	0,3
8	British Airways	1.121	-8,7
9	Turkish Airlines	1.057	12,3
10	Swiss	976	-6,3
11	SAS Scandinavian Airlines	836	12,7
12	Condor Flugdienst	799	-3,6
13	Austrian Airlines AG	734	1,1
14	Aeroflot Russian Airlines	528	0,8
15	TUIfly	485	-10,8
16	Luxair	420	-12,1
17	LOT - Polish Airlines	363	-44,3
18	United Airlines	351	-0,3
19	Air Dolomiti	342	402,9
20	Emirates	337	-1,5
21	Intersky	326	-12,8
22	SunExpress	326	4,8
23	Wizz Air	300	-5,1
24	Norwegian Air Shuttle	278	64,5
25	Finnair	276	0,7

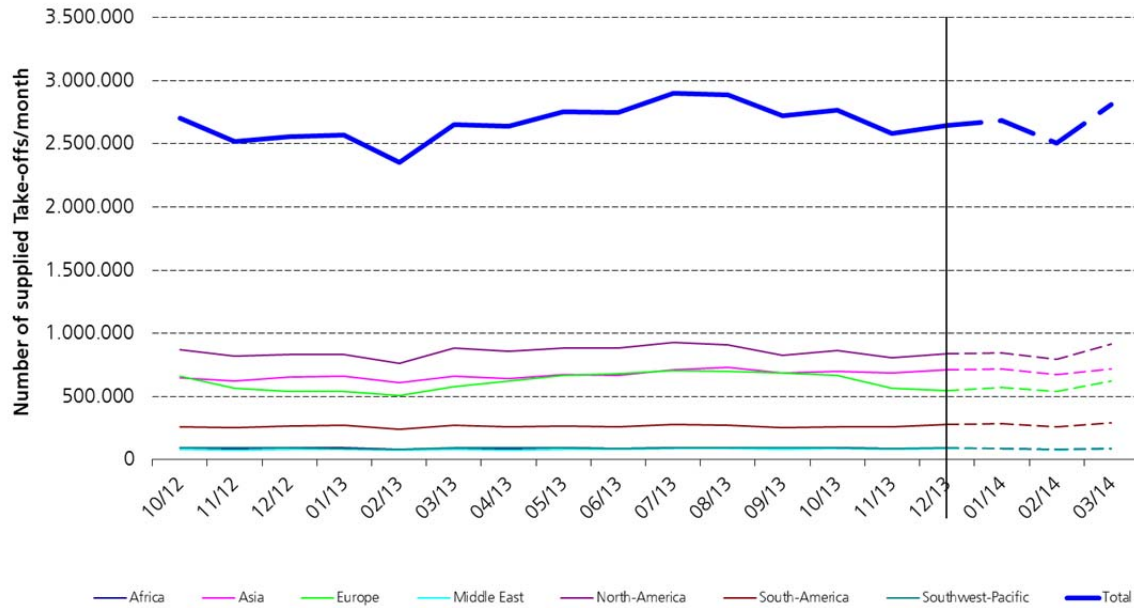
Tab. 6: Number of monthly Take-offs by the biggest Airlines in Germany

Rank	Airline	12/2013	Growth rate
1	Lufthansa German Airlines	40.117	-10,0
2	Ryanair	31.855	7,2
3	easyJet	30.934	3,4
4	Air France	28.444	-24,9
5	Turkish Airlines	28.032	21,6
6	British Airways	21.459	-6,1
7	SAS Scandinavian Airlines	20.134	2,5
8	KLM-Royal Dutch Airlines	15.478	4,8
9	Aeroflot Russian Airlines	13.785	28,1
10	Iberia	12.907	-14,5
11	Air Berlin	12.473	6,4
12	Alitalia	12.232	-2,8
13	Norwegian Air Shuttle	12.134	23,5
14	Flybe	12.119	-2,8
15	Swiss	10.859	-5,7
16	Wideroe's Flyveselskap	10.199	4,5
17	Pegasus Airlines	8.859	30,1
18	Austrian Airlines AG	8.794	-3,2
19	Vueling Airlines	8.594	16,3
20	TAP Air Portugal	8.172	0,1
21	Aer Lingus	7.166	0,5
22	HOP!	7.082	750,2
23	germanwings	6.919	61,1
24	Finnair	6.694	5,5
25	Wizz Air	6.367	11,0

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

Source: OAG 2012/13, DLR 2012/13

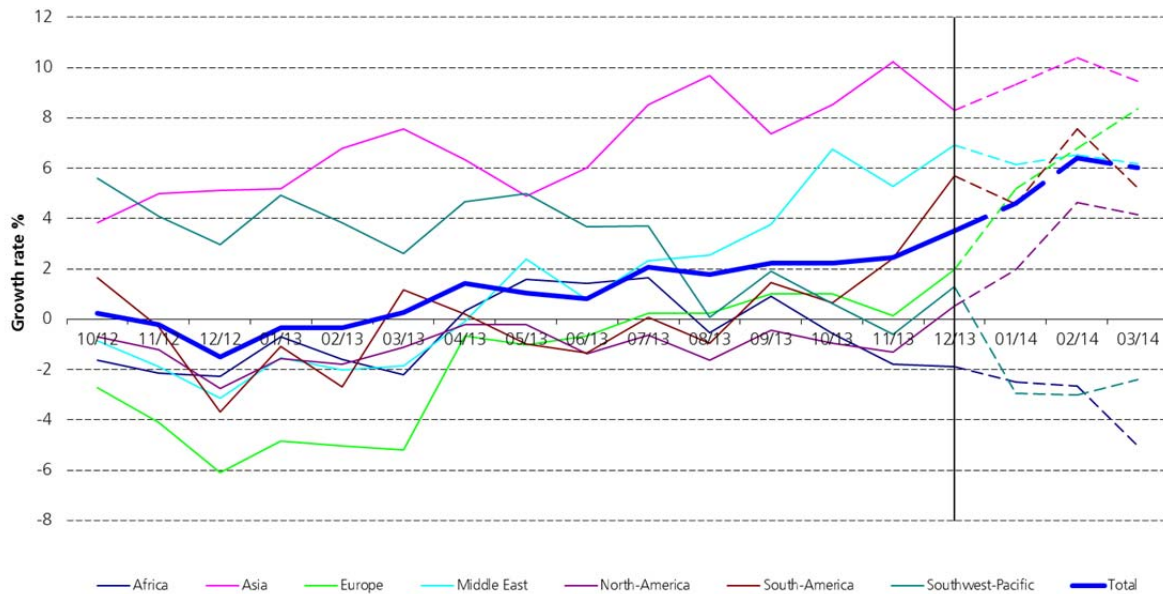
Development of the Global Air Transport Supply



Source: OAG 2012/2013, DLR 2012/2013

Fig. 1: Development of the Global Air Transport Supply

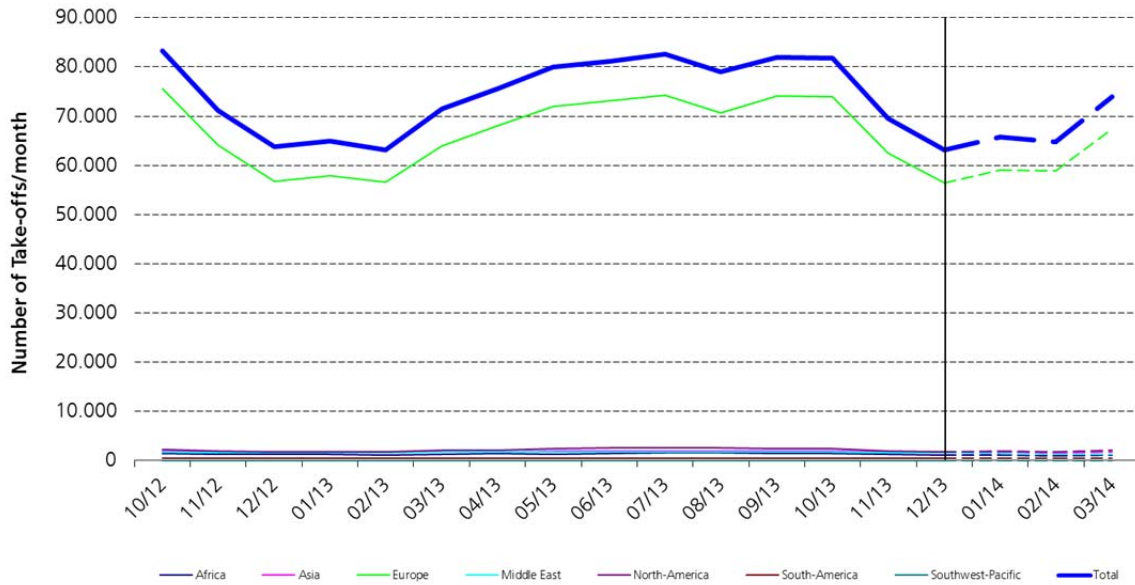
Changes in the Global Air Transport Supply



Source: OAG 2012/2013, DLR 2012/2013

Fig. 2: Changes in the Global Air Transport Supply

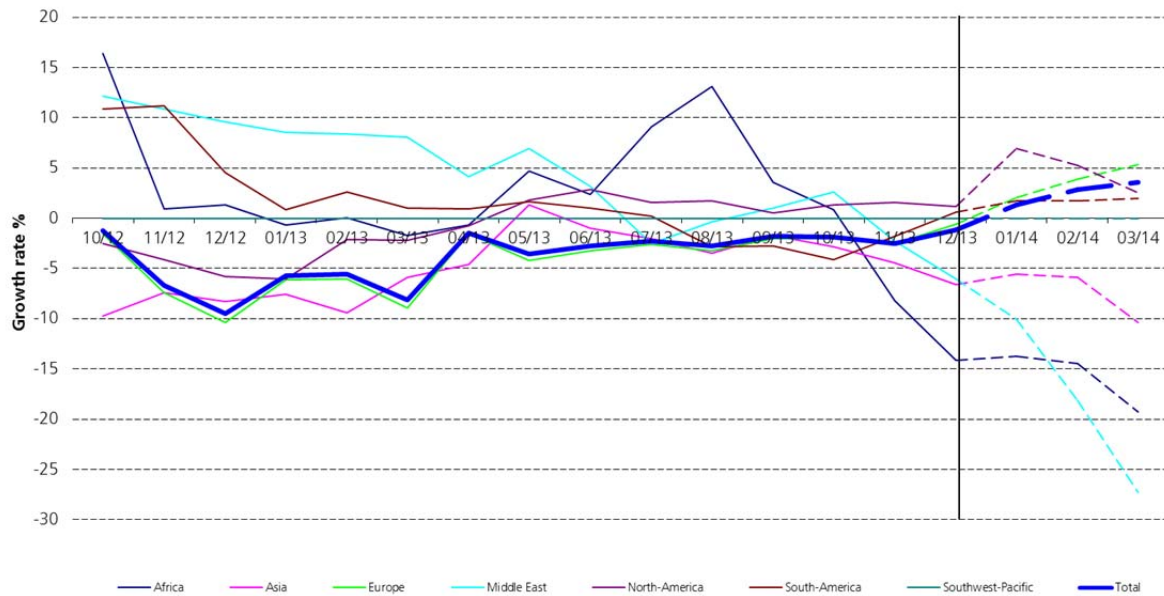
Development of the German Air Transport Supply



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

Authors:

Dr. Peter Berster  
DLR  
Flughafenwesen und Luftverkehr  
D-51147 Köln  
E-Mail: [peter.berster@dlr.de](mailto:peter.berster@dlr.de)

Dr. Marc Gelhausen  
DLR  
Flughafenwesen und Luftverkehr  
D-51147 Köln  
E-Mail: [marc.gelhausen@dlr.de](mailto:marc.gelhausen@dlr.de)

Holger Pabst  
DLR  
Flughafenwesen und Luftverkehr  
D-51147 Köln  
E-Mail: [holger.pabst@dlr.de](mailto:holger.pabst@dlr.de)

Dieter Wilken  
DLR  
Flughafenwesen und Luftverkehr  
D-51147 Köln  
E-Mail: [dieter.wilken@dlr.de](mailto:dieter.wilken@dlr.de)