

Global Aviation Monitor (GAM)

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

June 2012



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 2011: Nearly 31.6 M flights (non-stop) worldwide
- Busiest month 2011: August with 2.82 M flights
- Air traffic showed downward trend since April 2008, with a turnaround in December 2009
- Forecasting methodology: Time series analysis

Analysis: July 2011 – June 2012

Global

- June 2012: 2.72 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 (1.0% in June 2012)
- Airports: Most large US airports show downward trends; strong growth at Jakarta
- Airlines: The 5 biggest airlines are from USA, with downward trends of no. of flights offered; strong growth of Turkish Airways and China Eastern Airlines, strong growth of United Airlines because of merger with former Continental Airlines

World Regions, Europe

- Increase of traffic worldwide since December 2009; small decrease in North America and Europe, still growth in Asia and Middle East
- Airports: Heterogeneous development of no. of flights offered; very strong increase at Istanbul and Moscow, however decline at e.g. Madrid, Copenhagen and Milan Malpensa airport
- Airlines: Heterogeneous development of flights, except e.g. Aeroflot and Turkish Airways with strong growth, some growth in the low cost segment e.g. Wizz and Vueling but decrease of Air Berlin

Germany

- Airports: Some bigger airports with traffic growth, some smaller German airports with downward trends
- Airlines: Heterogeneous developments of number of flights offered; strong growth of Turkish Airlines

Outlook: July 2012 – September 2012

Global

- For the next few months, a decrease of traffic growth of around 2% is expected

World Regions, Europe

- A decrease of traffic growth in Europe of around 3% is expected

Germany

- For the next few month, a decrease of traffic growth of around 1-2% is expected

Rank	Airport	06/2012	Growth rate
1	Atlanta Hartsfield-Jackson Intl	39.553	-0,0
2	Chicago O'Hare International	38.019	-1,9
3	Dallas/Fort Worth Intl	26.892	-0,3
4	Denver Intl	26.051	-3,6
5	Los Angeles International	24.562	-1,9
6	Beijing Capital	23.329	5,0
7	Charlotte	21.744	0,9
8	Houston George Bush Intercontinental	21.296	-2,3
9	Frankfurt International	20.775	2,5
10	London Heathrow	19.592	-2,4
11	Paris Charles de Gaulle	19.539	-3,9
12	Detroit Wayne County	18.510	-2,9
13	Amsterdam	17.704	0,0
14	Philadelphia International	17.517	-2,6
15	San Francisco International	17.464	7,9
16	Minneapolis International	17.435	-2,2
17	New York J F Kennedy International	17.143	-3,2
18	Newark Liberty International	16.984	0,6
19	Toronto Lester B Pearson Intl	16.928	2,3
20	Phoenix Sky Harbor Intl	16.827	-2,4
21	Munich International	16.387	0,3
22	Tokyo Haneda	16.306	-0,2
23	Madrid Barajas	16.276	-10,4
24	Jakarta Soekarno-Hatta	15.816	9,3
25	New York La Guardia	15.694	-2,2

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

Rank	Airport	06/2012	Growth rate
1	Frankfurt International	20.775	2,5
2	Munich International	16.387	0,3
3	Berlin	10.013	7,0
4	Dusseldorf International	9.143	2,0
5	Hamburg	5.989	1,1
6	Stuttgart	4.568	-0,8
7	Cologne/Bonn K.A.	4.010	-2,5
8	Hanover	2.392	-1,6
9	Nuremberg	1.702	-4,7
10	Bremen	1.143	-1,0
11	Frankfurt Hahn	1.031	-6,5
12	Leipzig/Halle	935	-11,0
13	Dresden	931	-4,1
14	Dusseldorf Niederrhein	765	6,4
15	Dortmund	623	11,4
16	Munster	526	-22,1
17	Karlsruhe/Baden Baden	517	18,3
18	Friedrichshafen	401	-21,1
19	Memmingen	372	55,0
20	Paderborn	311	-15,3
21	Saarbrücken Ensheim	264	-25,6
22	Westerland	193	-8,5
23	Hamburg Luebeck	123	10,8
24	Saarbrücken Zweibrücken	81	26,6
25	Rostock-Laage	67	-2,9

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

Rank	Airport	06/2012	Growth rate
1	Frankfurt International	20.775	2,5
2	London Heathrow	19.592	-2,4
3	Paris Charles de Gaulle	19.539	-3,9
4	Amsterdam	17.704	0,0
5	Munich International	16.387	0,3
6	Madrid Barajas	16.276	-10,4
7	Istanbul Ataturk	14.858	15,1
8	Rome Fiumicino	13.831	-4,0
9	Barcelona	12.744	-0,7
10	London Gatwick	11.071	-0,5
11	Vienna	10.843	1,9
12	Paris Orly	10.353	4,0
13	Moscow Domodedovo	10.133	3,0
14	Zurich	10.123	-1,3
15	Berlin	10.013	3,7
16	Copenhagen	9.588	-8,0
17	Oslo	9.225	6,4
18	Dusseldorf International	9.143	2,0
19	Moscow Sheremetyevo International	8.912	9,7
20	Brussels	8.658	-1,4
21	Palma Mallorca	8.303	-0,0
22	Stockholm Arlanda	8.239	-0,3
23	Manchester International	7.424	1,2
24	Nice	7.232	4,8
25	Milan Malpensa	7.122	-6,6

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

Source: OAG 2011/12, DLR 2011/12

Rank	Airline	06/2012	Growth rate
1	United Airlines	175.988	70,7
2	Delta Air Lines	169.551	-4,9
3	American Airlines	106.407	-2,9
4	Southwest Airlines	98.766	-1,8
5	US Airways	97.031	-2,3
6	Lufthansa German Airlines	60.018	2,6
7	China Southern Airlines	50.946	4,8
8	Ryanair	48.824	5,9
9	Air Canada	48.139	0,7
10	Air France	45.480	0,5
11	China Eastern Airlines	44.104	10,5
12	easyJet	37.617	6,7
13	All Nippon Airways	32.885	-0,4
14	Air China	31.365	-0,7
15	British Airways	26.946	2,6
16	Turkish Airlines	26.719	17,9
17	TAM Linhas Aereas	26.260	-5,1
18	Alaska Airlines	25.816	3,8
19	Gol Transportes Aereos	23.894	-7,7
20	SAS Scandinavian Airlines	22.504	4,5
21	JetBlue Airways Corporation	22.422	7,3
22	Qantas Airways	21.528	-0,2
23	Air Berlin	20.893	-3,5
24	Japan Airlines International	20.590	6,7
25	AirTran Airways	20.454	-12,7

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

Rank	Airline	06/2012	Growth rate
1	Lufthansa German Airlines	36.257	4,4
2	Air Berlin	12.537	-2,6
3	germanwings	4.089	1,5
4	Ryanair	2.788	8,1
5	easyJet	1.796	0,7
6	Condor Flugdienst	1.722	4,6
7	Air France	1.681	-0,5
8	TUIfly	1.572	2,6
9	KLM-Royal Dutch Airlines	1.425	8,2
10	Swiss	1.190	6,3
11	British Airways	1.106	0,4
12	SAS Scandinavian Airlines	1.030	-2,9
13	Turkish Airlines	986	22,3
14	Austrian Airlines AG	834	-11,0
15	LOT - Polish Airlines	684	1,8
16	SunExpress	547	-31,1
17	Aeroflot Russian Airlines	528	4,6
18	United Airlines	480	77,8
19	Luxair	475	-25,5
	OLT Ostfriesische		
20	Luftransport GmbH	443	75,8
21	Intersky	426	-20,2
22	Flybe	377	-24,9
23	Iberia	361	-9,3
24	Clickair	348	-
25	Emirates	331	22,6

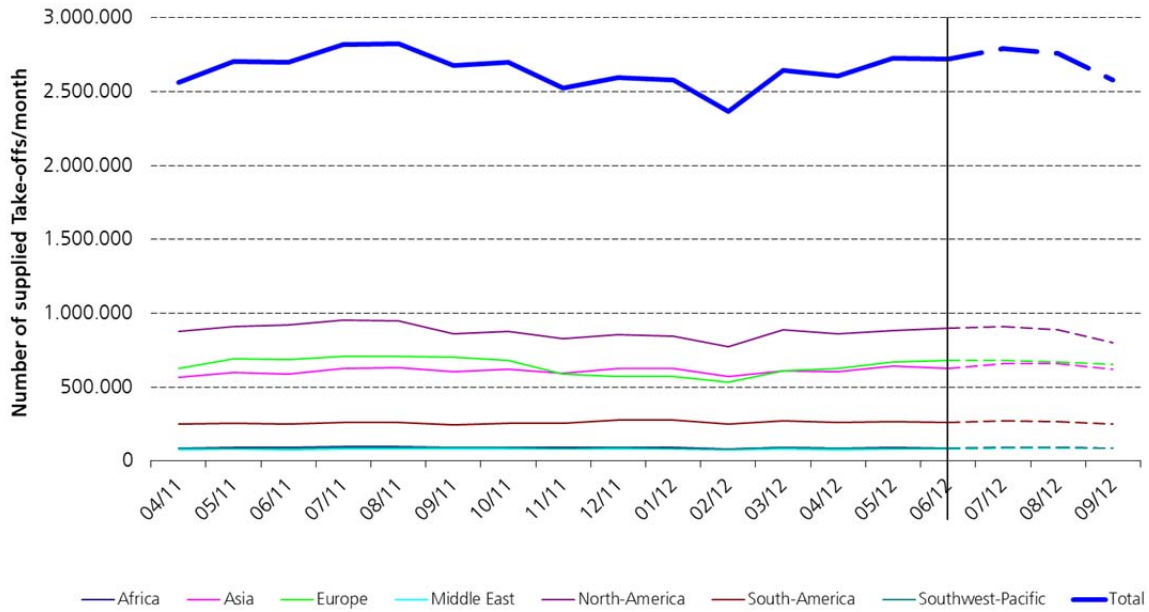
Tab. 6: Number of monthly Take-offs by the biggest Airlines in Germany

Rank	Airline	06/2012	Growth rate
1	Lufthansa German Airlines	55.602	2,6
2	Ryanair	48.361	6,4
3	Air France	41.648	0,3
4	easyJet	37.168	7,2
5	Turkish Airlines	23.729	16,4
6	SAS Scandinavian Airlines	22.212	4,4
7	British Airways	21.865	4,3
8	Air Berlin	20.426	-4,3
9	Iberia	18.989	-11,2
10	KLM-Royal Dutch Airlines	16.997	2,6
11	Flybe	16.543	7,2
12	Alitalia	15.854	-1,3
13	Norwegian Air Shuttle	12.174	14,6
14	Swiss	12.060	1,5
15	Aeroflot Russian Airlines	11.374	21,3
16	Austrian Airlines AG	11.074	0,0
17	Vueling Airlines	10.493	16,5
18	Wideroe's Flyveselskap	10.491	10,7
19	TAP Air Portugal	8.885	5,0
20	Aer Lingus	8.198	5,7
21	Pegasus Airlines	7.681	13,4
22	Finnair	6.993	-7,5
23	Wizz Air	6.919	73,5
24	LOT - Polish Airlines	6.896	2,3
25	germanwings	6.584	4,6

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

Source: OAG 2011/12, DLR 2011/12

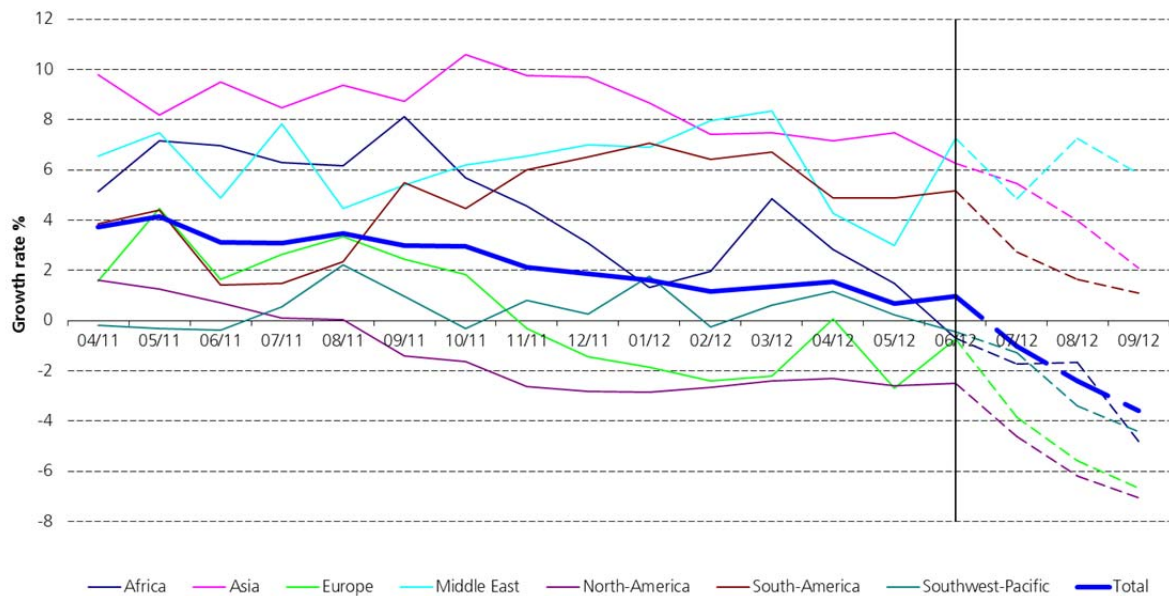
Development of the Global Air Transport Supply



Source: OAG 2011/2012, DLR 2011/2012

Fig. 1: Development of the Global Air Transport Supply

Changes in the Global Air Transport Supply



Source: OAG 2011/2012, DLR 2011/2012

Fig. 2: Changes in the Global Air Transport Supply

Development of the German Air Transport Supply

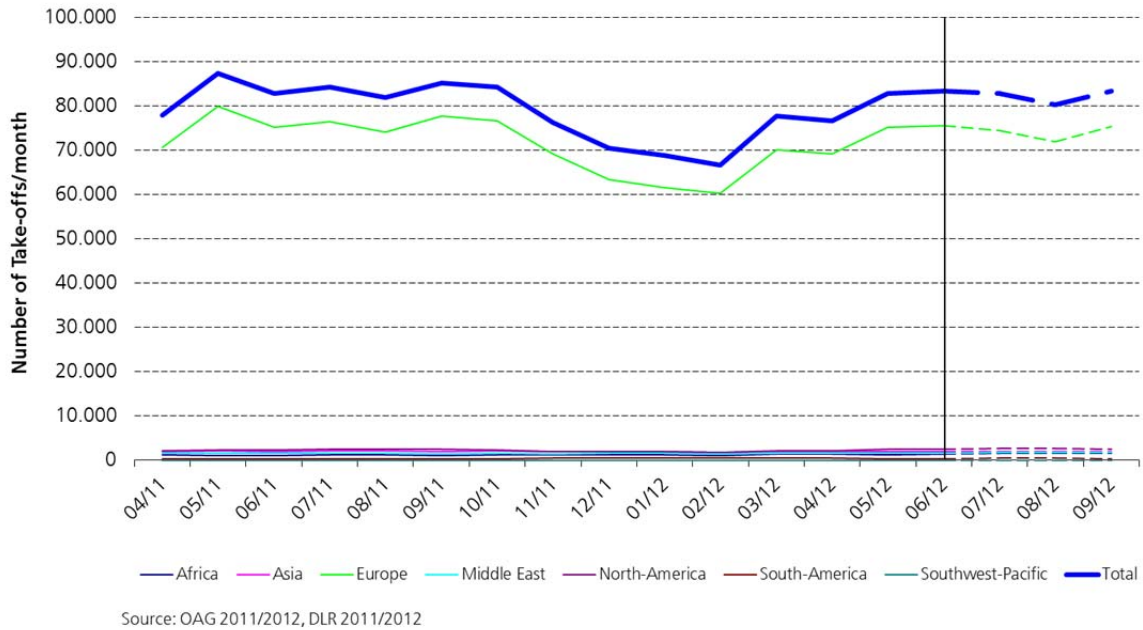


Fig. 3: Development of the German Air Transport Supply

Changes in the German Air Transport Supply

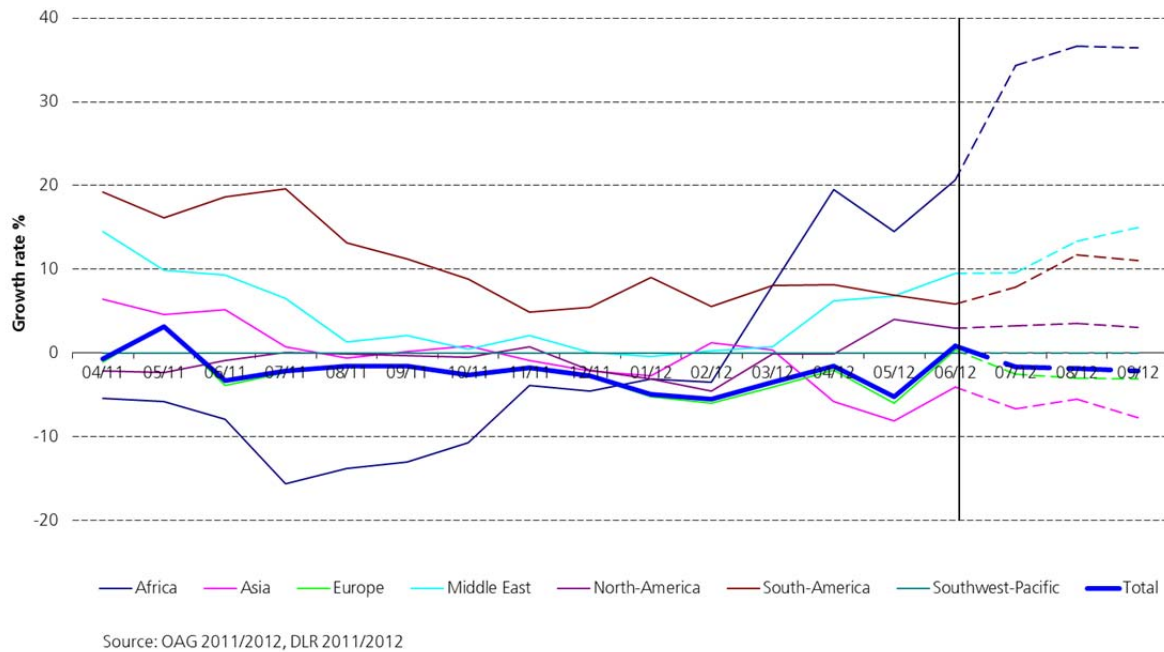


Fig. 4: Changes in the German Air Transport Supply

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