Flughafenwesen und Luftverkehr

Global Aviation Monitor (GAM)

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

December 2009

DLR

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 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
- Air traffic shows downward trend since April 2008, turnaround in December 2009
- Forecasting methodology: Time series analysis

Analysis: January 2009 – December 2009

Global

- December 2009: 2.40 M flights supplied
- Turnaround! More than 6% decline in April, 3% decline in July, 1% decline in September and October, 0% in November and more than 1% increase in December 2009 compared to 2008
- Airports: Still large decline of traffic volume at many airports worldwide; however, more and more large US airports show a slow rise; strong growth at Beijing airport
- Airlines: 7 out of the 10 biggest airlines are from USA, mostly with decreasing no. of flights offered, but at a slower pace than the months before

World Regions, Europe

- Still decline of traffic in Europe and North America; however, at a slower pace; already strong growth in Asia
- Airports: Still decline of air transport supply at numerous European airports; however, strong increase at e.g. Istanbul and Moscow
- Airlines: Large decline of flights of legacy carriers, except e.g. Air China and China Eastern Airlines, some growth in the low cost segment, e.g. Ryanair and Easyjet

Germany

- Further decline of the no. of flights offered; however, at a slower pace (minus 1-2%)
- Airports: Heterogeneous traffic developments; some larger airports, e.g. DUS show first signs of recovery
- Airlines: Heterogeneous developments of number of flights offered: still decline in the legacy carrier segment, but large growth in the low cost segment

Outlook: December 2009 – February 2010

Global

- For the next months, a traffic increase of up to 5% is expected

World Regions, Europe

- With the beginning of 2010 air transport supply is expected to expand

Germany

- Only small decrease of air transport supply, turnaround is expected for the next months

Rank	Airport	12/2009	Growth rate
1	Atlanta Hartsfield-Jackson Intl	39.286	-0,4
2	Chicago O'Hare International	34.062	-0,4
3	Dallas/Fort Worth Intl	26.459	3,0
4	Denver Intl	25.007	2,1
5	Los Angeles International	22.262	1,9
6	Houston George Bush Intercontinental	22.113	-1,0
7	Beijing Capital	21.458	10,1
8	Charlotte	19.542	-0,5
9	Paris Charles de Gaulle	18.973	-6,4
10	London Heathrow	18.823	0,9
11	Frankfurt International	17.725	-0,5
12	Philadelphia International	17.389	-2,3
13	Detroit Wayne County	17.250	-5,0
14	Madrid Barajas	17.196	0,5
15	Phoenix Sky Harbor Intl .	16.822	-0,8
16	New York J F Kennedy International	16.483	-8,5
17	Minneapolis International	15.821	-6,2
18	Newark Liberty International	15.798	-6,3
19	Toronto Lester B Pearson Intl	14.843	-1,2
20	San Francisco International	14.701	3,2
21	New York La Guardia	14.496	-0,9
22	Tokyo Haneda	14.465	0,5
23	Amsterdam	14.273	-6,9
24	Las Vegas McCarran International	13.800	-6,5
25	Miami International	13.777	4,0

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

Rank	Airport	12/2009	Growth rate
1	Frankfurt International	17.725	-0,5
2	Munich International	13.654	-4,4
3	Dusseldorf International	7.299	1,3
4	Berlin Tegel	5.437	-3,5
5	Hamburg	5.282	4,7
6	Stuttgart	3.665	-12,5
7	Cologne/Bonn K.A.	3.453	6,8
8	Berlin Schoenefeld	2.185	9,9
9	Nuremberg	1.832	-2,9
10	Hanover	1.749	-14,9
11	Frankfurt Hahn	1.095	-11,2
12	Bremen	1.054	-1,8
13	Dresden	897	-2,0
14	Leipzig/Halle	827	9,0
15	Dusseldorf Niederrhein	678	15,1
16	Munster	621	-1,1
17	Dortmund	466	2,0
18	Friedrichshafen	380	-16,3
19	Saarbrucken Ensheim	355	-16,3
20	Karlsruhe/Baden Baden	351	6,0
21	Memmingen	310	106,7
22	Paderborn	224	-34,7
23	Hamburg Luebeck	168	-0,6
24	Mannheim	109	-41,1
25	Erfurt	93	-12,3

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

Rank	Airport	12/2009	Growth rate
1	Paris Charles de Gaulle	18.973	-6,4
2	London Heathrow	18.823	0,9
3	Frankfurt International	17.725	-0,5
4	Madrid Barajas	17.196	0,5
5	Amsterdam	14.273	-6,9
6	Munich International	13.654	-4,4
7	Rome Fiumicino	12.399	-5,0
8	Istanbul Ataturk	10.332	12,0
9	Barcelona	9.942	-3,8
10	Vienna	9.216	-3,9
11	Zurich	9.014	1,8
12	Paris Orly	8.809	-1,5
13	London Gatwick	8.697	10,9
14	Copenhagen	7.922	1,3
15	Athens Intl Eleftherios Venizelos	7.385	12,0
16	Brussels	7.372	-5,6
17	Dusseldorf International	7.299	1,3
18	Moscow Domodedovo	7.093	14,3
19	Oslo	7.070	-0,7
20	Milan Malpensa	6.952	0,0
21	Moscow Sheremetyevo International	6.350	-4,1
22	Stockholm Arlanda	6.173	-6,9
23	Helsinki	5.922	-9,5
24	Dublin	5.609	-17,3
25	Berlin Tegel	5.437	-3,5

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

Source: OAG 2008/09, DLR 2008/09

Rank	Airline	12/2009	Growth rate
1	American Airlines	107.521	0,1
2	Delta Air Lines	103.319	-5,4
3	United Airlines	97.944	2,2
4	US Airways	94.338	-2,8
5	Southwest Airlines	92.293	-5,7
6	Continental Airlines	76.232	-3,4
7	Northwest Airlines	67.128	-7,7
8	Lufthansa German Airlines	50.650	-3,3
9	China Southern Airlines	43.904	8,9
10	Air France	43.503	-5,3
11	Air Canada	42.548	-1,9
12	China Eastern Airlines	36.564	12,1
13	Ryanair	32.198	8,5
14	All Nippon Airways	31.097	-0,1
15	Air China	29.094	8,9
16	easyJet	26.786	21,5
17	TAM Linhas Aereas	25.445	-8,8
18	Gol Transportes Aereos	24.349	27,6
19	Alaska Airlines	24.128	-3,9
20	British Airways	23.462	-2,2
21	Japan Airlines International	23.375	-3,2
22	Iberia	22.811	-14,0
23	AirTran Airways	21.804	5,7
24	Qantas Airways	20.258	-5,8
25	Turkish Airlines	19.390	25,5

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

Rank	Airline	12/2009	Growth rate
1	Lufthansa German Airlines	30.448	-4,7
2	Air Berlin	10.241	25,5
3	germanwings	3.485	12,1
4	Ryanair	2.761	6,5
5	Air France	1.614	-8,0
6	easyJet	1.296	21,1
7	KLM-Royal Dutch Airlines	1.169	-6,6
8	Austrian Airlines AG	1.129	-4,1
9	Swiss	1.069	6,5
10	British Airways	1.015	7,1
11	SAS Scandinavian Airlines	803	-10,9
12	Turkish Airlines	799	31,0
13	LOT - Polish Airlines	661	-0,5
14	Condor Flugdienst	648	-13,8
15	Luxair	585	2,5
16	Cirrus Airlines	575	-32,9
17	SunExpress	550	109,9
18	TUIfly	524	-76,9
19	Aeroflot Russian Airlines	506	6,8
20	Flybe	485	3,9
21	Intersky	443	-15,5
22	Czech Airlines	398	-16,0
23	Iberia	378	-6,4
24	Aegean Airlines	332	23,0
25	Adria Airways	278	-2,1

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

Rank	Airline	12/2009	Growth rate
1	Lufthansa German Airlines	47.068	-3,2
2	Air France	39.948	-5,1
3	Ryanair	31.788	7,9
4	easyJet	26.344	21,2
5	Iberia	21.610	-15,2
6	British Airways	18.667	-3,9
7	Turkish Airlines	17.568	25,0
8	SAS Scandinavian Airlines	17.070	-13,2
9	Air Berlin	15.892	21,4
10	KLM-Royal Dutch Airlines	13.689	-8,2
11	Flybe	12.003	0,7
12	Alitalia	11.405	-5,4
13	Swiss	11.153	2,9
14	Austrian Airlines AG	10.665	-2,5
15	Wideroe's Flyveselskap	7.711	0,1
16	TAP Air Portugal	7.632	-11,2
17	Norwegian Air Shuttle	7.033	25,0
18	Vueling Airlines	6.656	104,0
19	Aeroflot Russian Airlines	6.642	0,9
20	Olympic Airlines	6.300	-3,8
21	Finnair	6.069	-11,8
22	LOT - Polish Airlines	6.040	1,8
23	Aer Lingus	5.684	2,4
24	Czech Airlines	5.593	-10,4
25	Brussels Airlines	5.201	3,4

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

Source: OAG 2008/09, DLR 2008/09

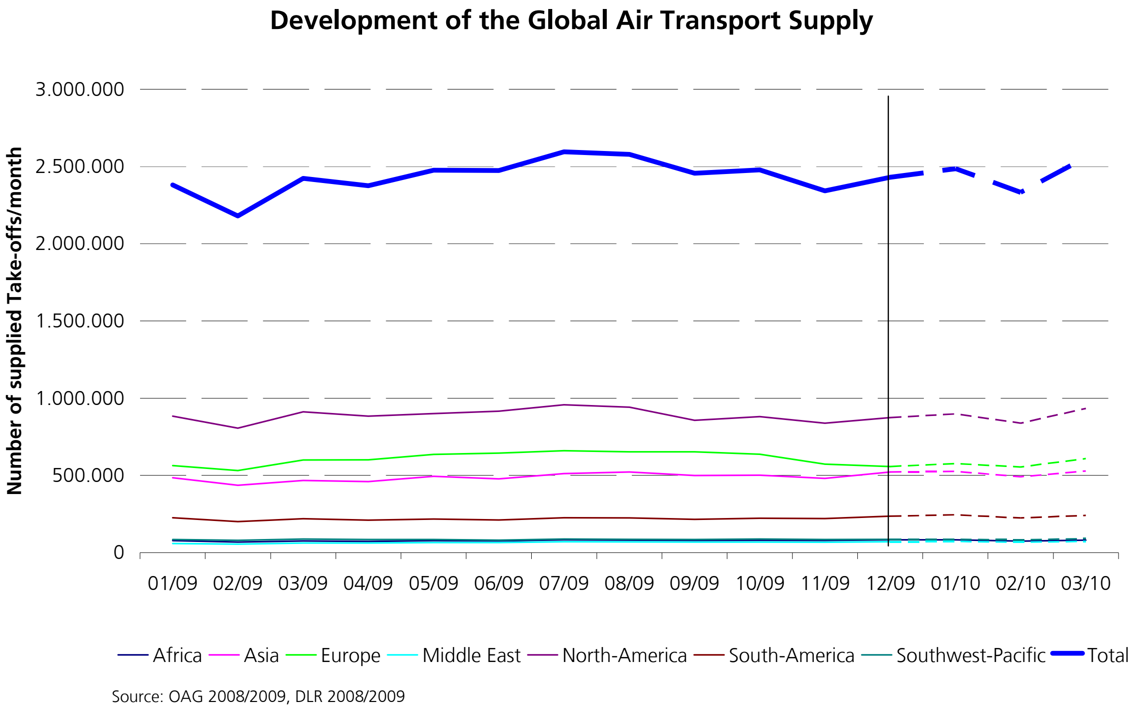

Fig. 1: Development of the Global Air Transport Supply

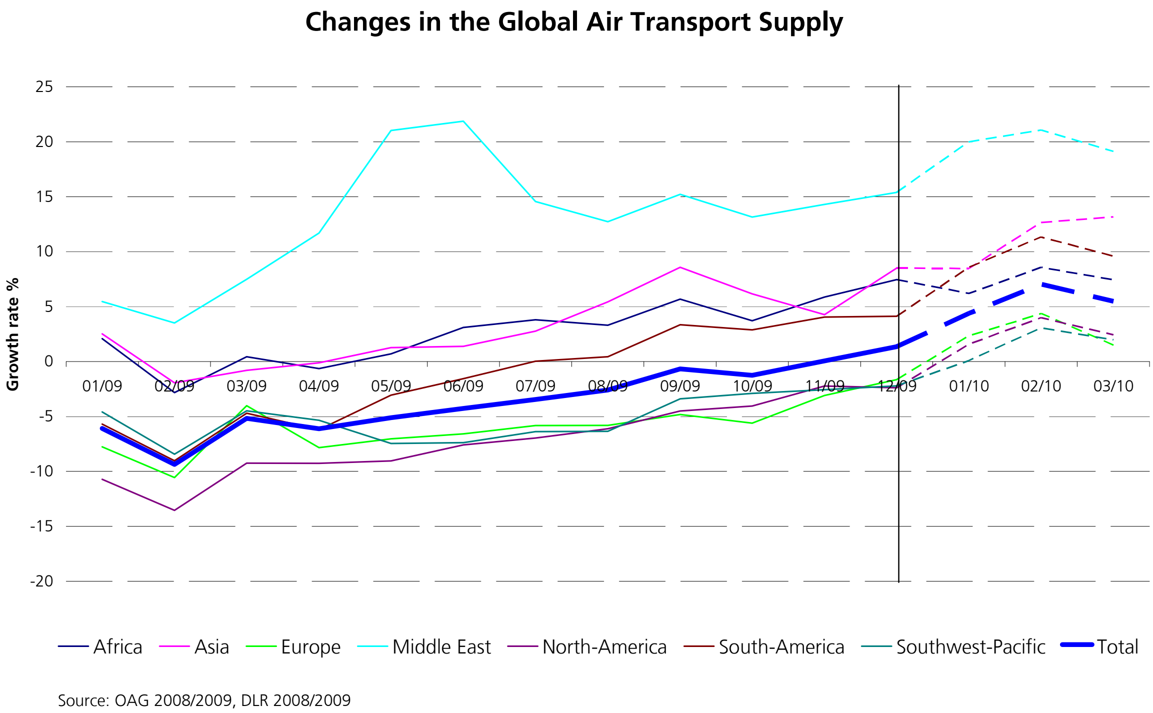

Fig. 2: Changes in the Global Air Transport Supply

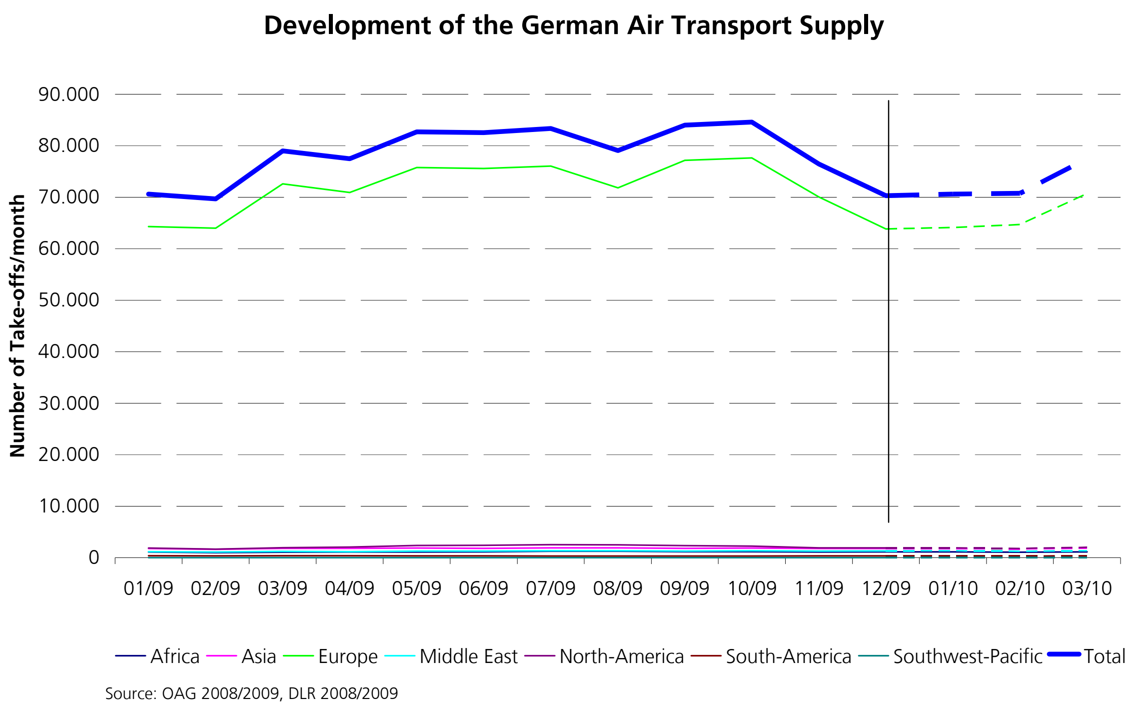

Fig. 3: Development of the German Air Transport Supply

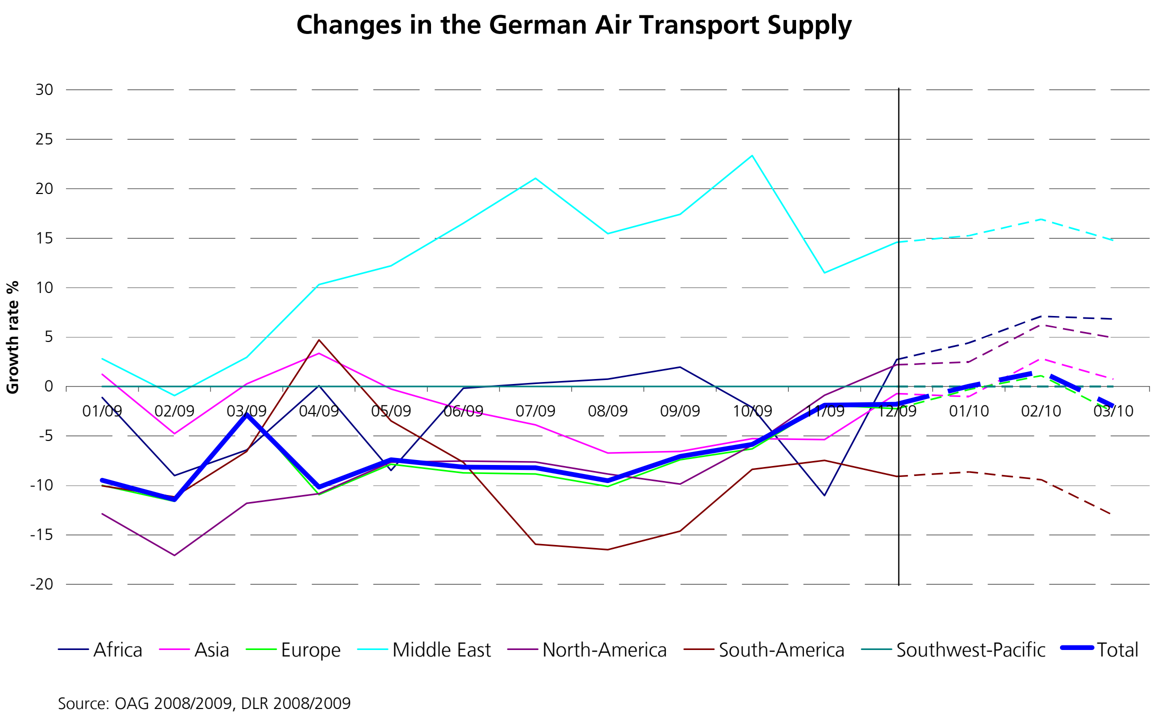

Fig. 4: Changes in the German Air Transport Supply

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