Flughafenwesen und Luftverkehr

Global Aviation Monitor (GAM)

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

March 2011

DLR

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 2010: Nearly 30,6 M flights (non-stop) worldwide
- Busiest month 2010: July with 2,74 M flights
- Air traffic showed downward trend since April 2008, with a turnaround in December 2009
- Forecasting methodology: Time series analysis

Analysis: April 2010 – March 2011

Global

- March 2011: 2.61 M flights supplied
- More than 9% decline in February 2008, 0% in November 2009, turnaround with 1% increase in December 2009, more than 3% growth in February 2010 and around 4.1% in March 2011 compared to 2010
- Airports: Traffic growth at most airports worldwide; more and more large US airports show a rise; strong growth at Tokyo and Charlotte airport
- Airlines: 6 out of the 10 biggest airlines are from USA, most of them with increasing no. of flights offered; strong growth of All Nippon Airlines and easyjet

World Regions, Europe

- Increase of traffic worldwide since December 2009; increase in Europe, stagnation in North America, already strong growth in Asia and Middle East, but with downwards tendency
- Airports: Increase in air transport supply at most European airports; with strong increase at Moscow, Helsinki, Stockholm and Barcelona, however decline at Athens airport
- Airlines: Small increase of flights of some legacy carriers, except e.g. Alitalia, Aeroflot and Finnair with strong growth, some growth in the low cost segment e.g. easyjet and Vueling

Germany

- Airports: Heterogeneous traffic developments; some larger airports, e.g. TXL show a rise, some smaller airports with decreasing air transport supply
- Airlines: Heterogeneous developments of number of flights offered; still decline in the Low Cost carrier segment except easyjet, some growth in the legacy carrier segment

Outlook: April 2011 – June 2011

Global

- For the next months, a traffic growth of around 2-3% is expected.

World Regions, Europe

- Increase of around 2% in Europe is expected

Germany

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

Rank	Airport	03/2011	Growth rate
1	Atlanta Hartsfield-Jackson Intl	39,793	-1.0
2	Chicago O'Hare International	37,874	5.8
3	Dallas/Fort Worth Intl	27,077	0.5
4	Denver Intl	26,556	1.8
5	Los Angeles International	23,348	2.8
6	Charlotte	22,100	11.5
7	Houston George Bush Intercontinental	21,922	1.7
8	Beijing Capital	21,813	4.1
9	London Heathrow	20,264	3.5
10	Frankfurt International	20,011	3.2
11	Paris Charles de Gaulle	19,862	1.0
12	Detroit Wayne County	18,945	2.4
13	Madrid Barajas	18,477	1.8
14	Philadelphia International	18,149	1.7
15	Phoenix Sky Harbor Intl .	18,105	6.0
16	Minneapolis International	17,328	3.0
17	New York J F Kennedy International	17,085	3.2
18	Newark Liberty International	16,799	0.0
19	Tokyo Haneda	16,583	17.5
20	New York La Guardia	16,542	4.8
21	Munich International	16,432	5.3
22	Amsterdam	16,318	5.5
23	Toronto Lester B Pearson Intl	15,943	1.3
24	San Francisco International	15,282	2.5
25	Las Vegas McCarran International	14,662	5.3

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

Rank	Airport	03/2011	Growth rate
1	Frankfurt International	20,011	3.2
2	Munich International	16,432	5.3
3	Dusseldorf International	8,680	1.1
4	Berlin Tegel	6,800	7.0
5	Hamburg	5,925	-2.6
6	Stuttgart	4,088	-5.0
7	Cologne/Bonn K.A.	3,667	-5.5
8	Berlin Schoenefeld	2,433	2.5
9	Hanover	2,277	9.3
10	Nuremberg	1,981	-5.8
11	Bremen	1,255	-0.3
12	Dresden	984	-4.6
13	Leipzig/Halle	950	0.7
14	Frankfurt Hahn	940	-14.8
15	Dusseldorf Niederrhein	784	6.4
16	Munster	611	-5.7
17	Friedrichshafen	519	15.1
18	Dortmund	480	-11.1
19	Karlsruhe/Baden Baden	377	-6.2
20	Saarbrucken Ensheim	342	-19.5
21	Paderborn	306	5.5
22	Memmingen	215	-33.8
23	Hamburg Luebeck	97	-47.6
24	Erfurt	95	-31.2
25	Mannheim	92	-38.7

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

Rank	Airport	03/2011	Growth rate
1	London Heathrow	20,264	3.5
2	Frankfurt International	20,011	3.2
3	Paris Charles de Gaulle	19,862	1.0
4	Madrid Barajas	18,477	1.8
5	Munich International	16,432	5.3
6	Amsterdam	16,318	5.5
7	Rome Fiumicino	13,299	0.6
8	Barcelona	11,588	10.4
9	Istanbul Ataturk	10,938	5.7
10	Copenhagen	10,582	4.0
11	Vienna	10,322	1.9
12	Zurich	9,848	3.8
13	Paris Orly	9,792	2.4
14	London Gatwick	9,474	4.5
15	Oslo	9,106	9.1
16	Dusseldorf International	8,680	1.1
17	Brussels	8,668	2.6
18	Stockholm Arlanda	8,630	11.4
19	Moscow Domodedovo	7,928	18.8
20	Helsinki	7,806	11.5
21	Milan Malpensa	7,682	3.7
22	Moscow Sheremetyevo International	7,145	12.3
23	Berlin Tegel	6,800	7.0
24	Athens Intl Eleftherios Venizelos	6,309	-16.2
25	Geneva	6,079	6.4

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

Source: OAG 2010/11, DLR 2010/11

Rank	Airline	03/2011	Growth rate
1	Delta Air Lines	179,280	0.9
2	American Airlines	110,619	1.4
3	United Airlines	103,489	-0.6
4	US Airways	101,305	4.7
5	Southwest Airlines	99,857	4.7
6	Continental Airlines	76,821	0.2
7	Lufthansa German Airlines	59,632	3.7
8	Air Canada	47,409	4.9
9	China Southern Airlines	46,066	3.1
10	Air France	45,278	-2.2
11	China Eastern Airlines	38,613	4.9
12	Ryanair	35,774	2.4
13	All Nippon Airways	32,577	12.8
14	easyJet	32,448	10.5
15	Air China	31,149	5.0
16	TAM Linhas Aereas	26,720	-4.2
17	Gol Transportes Aereos	26,435	5.4
18	British Airways	25,909	4.2
19	Iberia	24,690	0.5
20	Alaska Airlines	24,641	1.7
21	AirTran Airways	23,253	2.5
22	SAS Scandinavian Airlines	23,252	2.9
23	Qantas Airways	22,217	2.6
24	Turkish Airlines	21,064	9.2
25	JetBlue Airways Corporation	21,014	4.4

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

Rank	Airline	03/2011	Growth rate
1	Lufthansa German Airlines	36,047	3.0
2	Air Berlin	11,618	-5.5
3	germanwings	3,483	-1.2
4	Ryanair	2,615	-11.2
5	Air France	1,813	4.9
6	easyJet	1,791	13.1
7	KLM-Royal Dutch Airlines	1,284	1.5
8	British Airways	1,187	5.7
9	SAS Scandinavian Airlines	1,178	3.4
10	Swiss	1,143	3.5
11	Austrian Airlines AG	1,135	-4.4
12	TUIfly	923	9.5
13	Cirrus Airlines	834	-2.0
14	Condor Flugdienst	833	4.1
15	LOT - Polish Airlines	723	-0.6
16	Luxair	667	-2.8
17	Turkish Airlines	640	-14.7
18	SunExpress	582	20.7
19	Intersky	540	1.5
20	Flybe	515	-17.7
21	Iberia	482	13.4
22	Aeroflot Russian Airlines	389	-21.3
23	Brussels Airlines	364	18.2
24	Finnair	335	18.0
25	Aegean Airlines	326	-0.9

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

Rank	Airline	03/2011	Growth rate
1	Lufthansa German Airlines	55,403	3.3
2	Air France	41,569	-2.4
3	Ryanair	35,235	2.1
4	easyJet	31,796	10.2
5	Iberia	23,231	-0.7
6	SAS Scandinavian Airlines	23,005	2.8
7	British Airways	20,834	4.3
8	Turkish Airlines	18,764	7.5
9	Air Berlin	18,132	-4.2
10	KLM-Royal Dutch Airlines	15,703	4.4
11	Alitalia	14,709	18.4
12	Flybe	14,419	3.0
13	Swiss	12,160	4.2
14	Austrian Airlines AG	11,012	-5.0
15	Wideroe's Flyveselskap	10,169	17.5
16	Norwegian Air Shuttle	10,005	12.9
17	Finnair	8,333	18.2
18	TAP Air Portugal	8,012	6.6
19	Aeroflot Russian Airlines	7,697	13.0
20	LOT - Polish Airlines	6,924	5.4
21	Brussels Airlines	6,826	5.4
22	Aer Lingus	6,593	15.9
23	Vueling Airlines	6,388	60.2
24	Pegasus Airlines	5,784	43.4
25	Wizz Air	4,978	5.8

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

Source: OAG 2010/11, DLR 2010/11

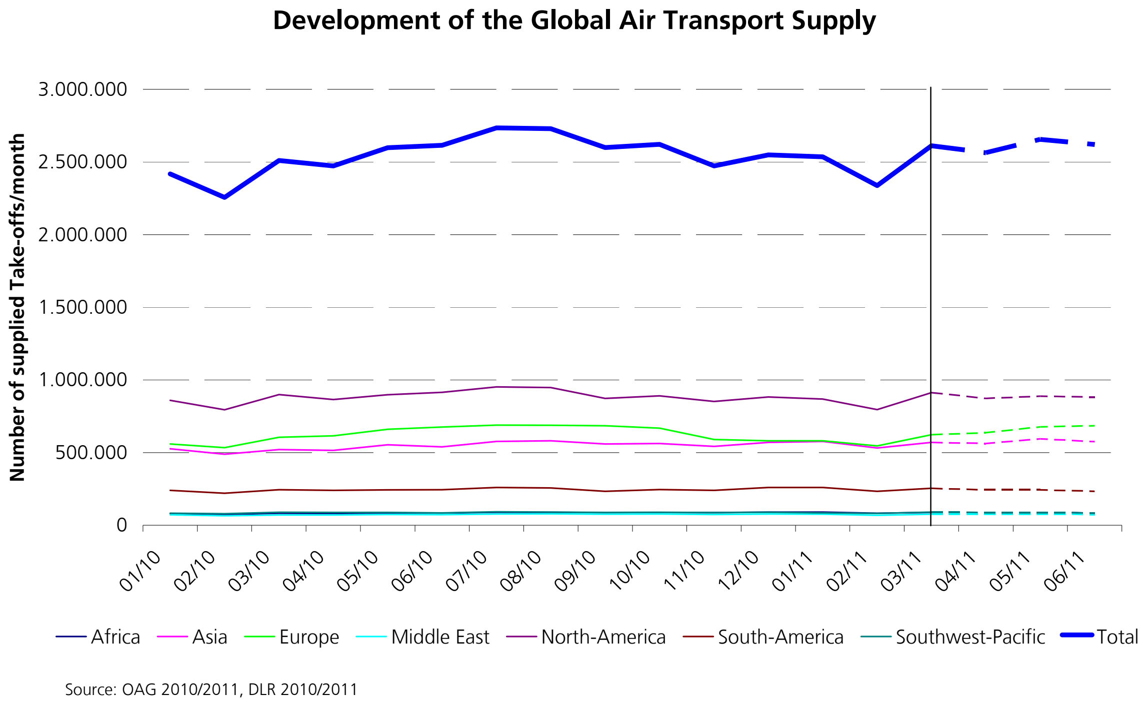

Fig. 1: Development of the Global Air Transport Supply

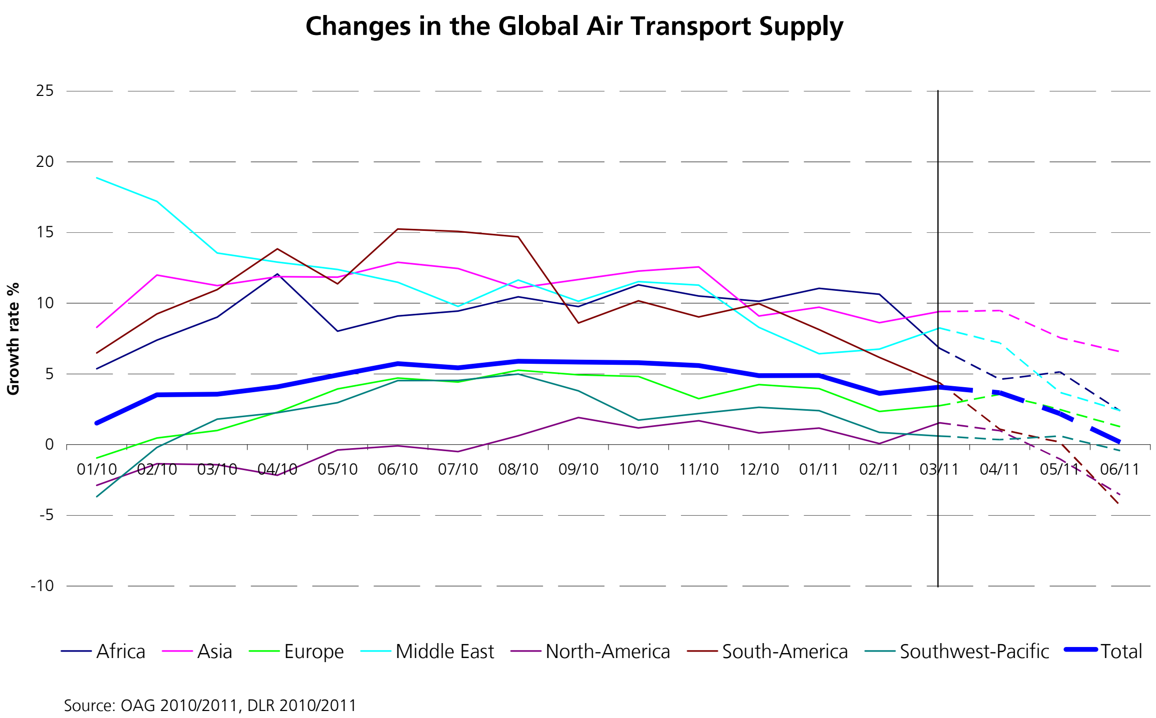

Fig. 2: Changes in the Global Air Transport Supply

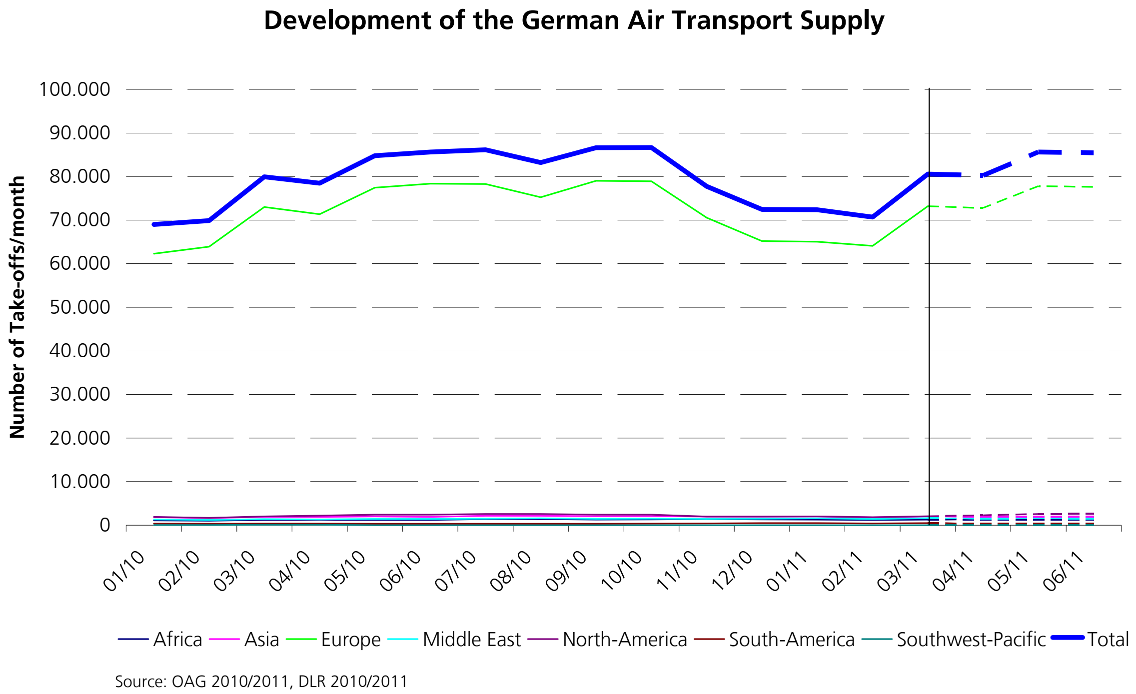

Fig. 3: Development of the German Air Transport Supply

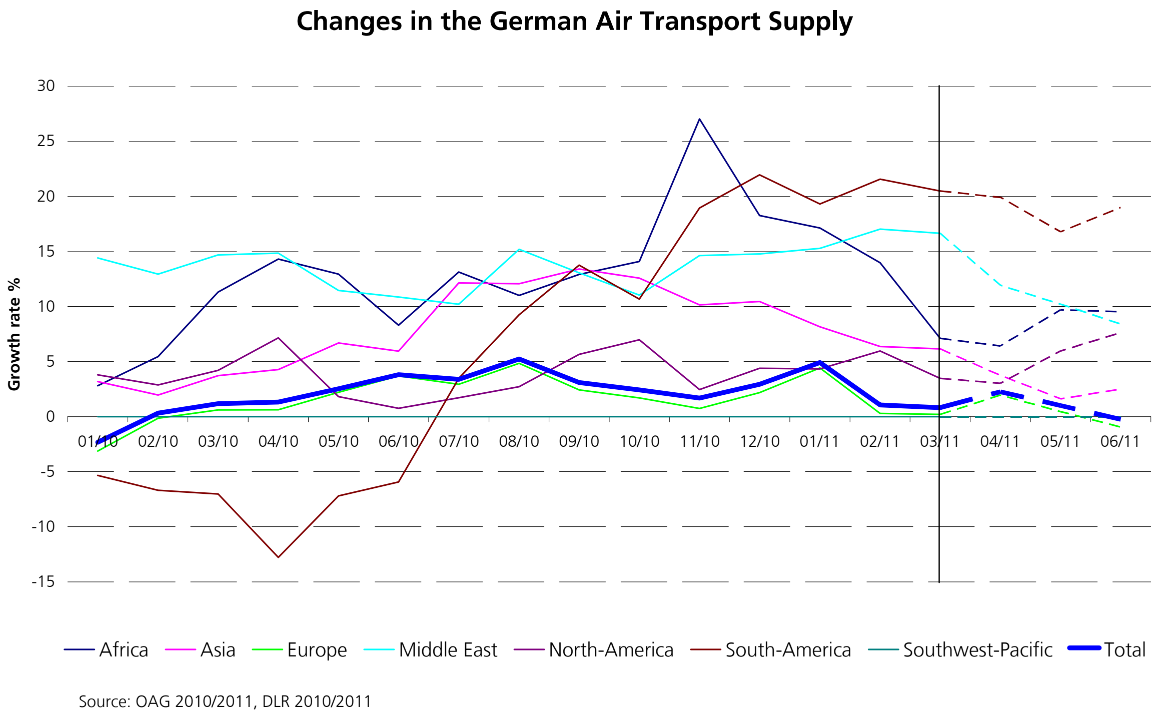

Fig. 4: Changes in the German Air Transport Supply

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