

Global Aviation Monitor (GAM)

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

March 2014



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: April 2013 – March 2014

Global

- March 2014: 2.71 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 (+11.2%) and Jakarta (+9.2%)
- Airlines: Heterogeneous development of no. of flights offered; strong growth of Turkish Airways and Scandinavian Airlines

World Regions, Europe

- Overall small increase since April 2013; in Europe, small traffic increase since July 2013; in Asia continued growth; no growth in North America
- Airports: Heterogeneous developments of no. of flights offered; strong increase at Moscow, Oslo, Stockholm and Istanbul, however decline at some airports, e.g. Madrid and Paris-CDG
- Airlines: Heterogeneous developments of flights, some airlines, e.g. Turkish Airways, SAS 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. Bremen, with traffic growth; most bigger German airports, e.g. Stuttgart, 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: April 2014 – June 2014

Global

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

World Regions, Europe

- Small increase of traffic growth in Europe of around 2% is expected

Germany

- For the next few month, a downward trend is expected

Rank	Airport	03/2014	Growth rate
1	Atlanta Hartsfield-Jackson Intl	37.821	-2,7
2	Chicago O'Hare International	36.738	1,2
3	Dallas/Fort Worth Intl	28.161	-0,2
4	Los Angeles International	24.977	6,3
5	Beijing Capital	24.117	2,6
6	Denver Intl	23.808	-2,8
7	Charlotte	22.346	-1,7
8	Houston George Bush Intercontinental	21.112	0,1
9	London Heathrow	19.791	-0,9
10	Frankfurt International	18.766	-0,4
11	Paris Charles de Gaulle	17.865	-3,3
12	Phoenix Sky Harbor Intl .	17.393	-0,2
13	Jakarta Soekarno-Hatta	17.230	9,2
14	Tokyo Haneda	17.160	2,2
15	Philadelphia International	17.121	-3,4
16	Minneapolis International	16.921	-3,7
17	New York J F Kennedy International	16.792	1,4
18	San Francisco International	16.749	4,6
19	Detroit Wayne County	16.725	-7,5
20	Newark Liberty International	16.723	-1,3
21	Amsterdam	16.712	2,7
22	Toronto Lester B Pearson Intl	16.620	-1,5
23	Guangzhou	16.549	3,1
24	Istanbul Ataturk	16.500	11,2
25	New York La Guardia	15.953	-1,3

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

Rank	Airport	03/2014	Growth rate
1	Frankfurt International	18.766	-0,4
2	Munich International	15.056	1,1
3	Dusseldorf International	7.619	-2,3
4	Berlin Tegel	7.099	4,7
5	Hamburg	5.325	7,8
6	Stuttgart	3.320	-7,0
7	Cologne/Bonn K.A.	2.971	-1,2
8	Berlin Schoenefeld	1.973	1,5
9	Hanover	1.940	-0,6
10	Nuremberg	1.539	-7,7
11	Bremen	1.032	11,4
12	Leipzig/Halle	804	12,6
13	Dresden	708	-2,5
14	Frankfurt Hahn	567	-22,0
15	Dortmund	473	-2,5
16	Dusseldorf Niederrhein	391	-30,7
17	Munster	350	14,4
18	Friedrichshafen	278	-19,0
19	Karlsruhe/Baden Baden	236	-4,8
20	Saarbrücken Ensheim	235	-27,7
21	Paderborn	217	0,5
22	Memmingen	160	-7,5
23	Augsburg	51	6,3
24	Hamburg Luebeck	49	-40,2
25	Erfurt	42	281,8

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

Rank	Airport	03/2014	Growth rate
1	London Heathrow	19.791	-0,9
2	Frankfurt International	18.766	-0,4
3	Paris Charles de Gaulle	17.865	-3,3
4	Amsterdam	16.712	2,7
5	Istanbul Ataturk	16.500	11,2
6	Munich International	15.056	1,1
7	Madrid Barajas	13.215	-8,6
8	Rome Fiumicino	11.478	2,3
9	Barcelona	9.994	-1,8
10	Copenhagen	9.860	9,7
11	Moscow Sheremetyevo International	9.794	16,6
12	Oslo	9.746	14,6
13	Paris Orly	9.596	-0,1
14	Moscow Domodedovo	9.467	5,2
15	London Gatwick	9.256	7,1
16	Vienna	9.213	-1,6
17	Stockholm Arlanda	9.158	13,5
18	Zurich	9.043	-3,3
19	Brussels	7.902	5,4
20	Dusseldorf International	7.619	-2,3
21	Berlin Tegel	7.099	4,7
22	Helsinki	6.481	-1,6
23	Geneva	6.391	0,9
24	Milan Malpensa	6.242	1,8
25	Dublin	6.229	4,2

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

Source: OAG 2013/14, DLR 2013/14

Rank	Airline	03/2014	Growth rate
1	United Airlines	166.408	-2,5
2	Delta Air Lines	160.312	-2,7
3	American Airlines	109.431	-0,5
4	Southwest Airlines	101.382	2,3
5	US Airways	97.356	-1,3
6	China Southern Airlines	54.813	6,4
7	Lufthansa German Airlines	49.298	-6,6
8	Air Canada	47.063	-1,3
9	China Eastern Airlines	46.433	2,3
10	All Nippon Airways	34.639	4,0
11	easyJet	34.380	3,3
12	Ryanair	34.375	-5,9
13	Air China	33.917	4,9
14	Turkish Airlines	33.431	21,9
15	Air France	33.229	-22,2
16	British Airways	29.319	-3,6
17	Alaska Airlines	26.908	5,4
18	SAS Scandinavian Airlines	26.593	10,0
19	Gol Transportes Aereos	26.022	-5,7
20	Lion Air	25.841	8,5
21	JetBlue Airways Corporation	25.556	5,2
22	Qantas Airways	23.973	2,6
23	TAM Linhas Aereas	22.854	-6,0
24	Japan Airlines International	22.276	4,6
25	Azul	22.267	-2,7

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

Rank	Airline	03/2014	Growth rate
1	Lufthansa German Airlines	30.075	-6,4
2	Air Berlin	9.925	4,5
3	germanwings	5.491	58,0
4	easyJet	1.769	5,6
5	Ryanair	1.606	-17,3
6	Air France	1.389	-12,6
7	British Airways	1.329	2,5
8	KLM-Royal Dutch Airlines	1.298	-2,5
9	SAS Scandinavian Airlines	1.112	11,9
10	Turkish Airlines	1.093	16,3
11	Swiss	1.015	-6,2
12	Condor Flugdienst	920	-7,5
13	Austrian Airlines AG	827	1,3
14	TUIfly	680	-15,6
15	Aeroflot Russian Airlines	550	1,9
16	Luxair	467	-12,7
17	Air Dolomiti	445	11,8
18	LOT - Polish Airlines	401	-44,3
19	SunExpress	401	12,0
20	United Airlines	371	-1,1
21	Intersky	351	-12,3
22	Emirates	336	-1,5
23	Norwegian Air Shuttle	333	79,0
24	Wizz Air	307	-6,7
25	Brussels Airlines	305	-1,6

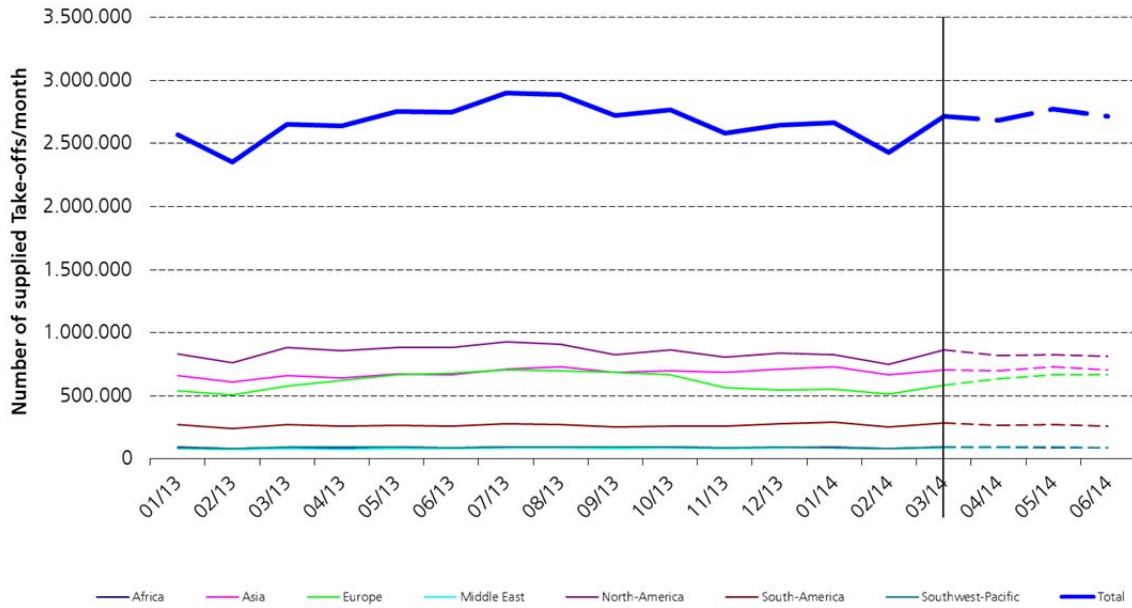
Tab. 6: Number of monthly Take-offs by the biggest Airlines in Germany from German airports

Rank	Airline	03/2014	Growth rate
1	Lufthansa German Airlines	45.412	-6,6
2	Ryanair	33.738	-6,7
3	easyJet	33.648	3,0
4	Air France	29.807	-23,7
5	Turkish Airlines	28.718	20,9
6	SAS Scandinavian Airlines	26.310	10,1
7	British Airways	23.695	-5,4
8	KLM-Royal Dutch Airlines	16.395	2,4
9	Air Berlin	14.901	1,1
10	Aeroflot Russian Airlines	14.705	30,3
11	Norwegian Air Shuttle	13.844	25,9
12	Iberia	13.702	-16,0
13	Flybe	13.159	-3,1
14	Alitalia	12.617	2,7
15	Wideroe's Flyveselskap	11.469	11,0
16	Swiss	11.157	-6,3
17	Austrian Airlines AG	9.342	-6,1
18	Pegasus Airlines	9.029	15,3
19	Vueling Airlines	8.593	9,3
20	germanwings	8.187	58,8
21	TAP Air Portugal	7.934	-0,8
22	HOP!	7.862	526,0
23	Finnair	7.770	2,2
24	Aer Lingus	7.502	3,1
25	Wizz Air	6.654	7,1

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

Source: OAG 2013/14, DLR 2013/14

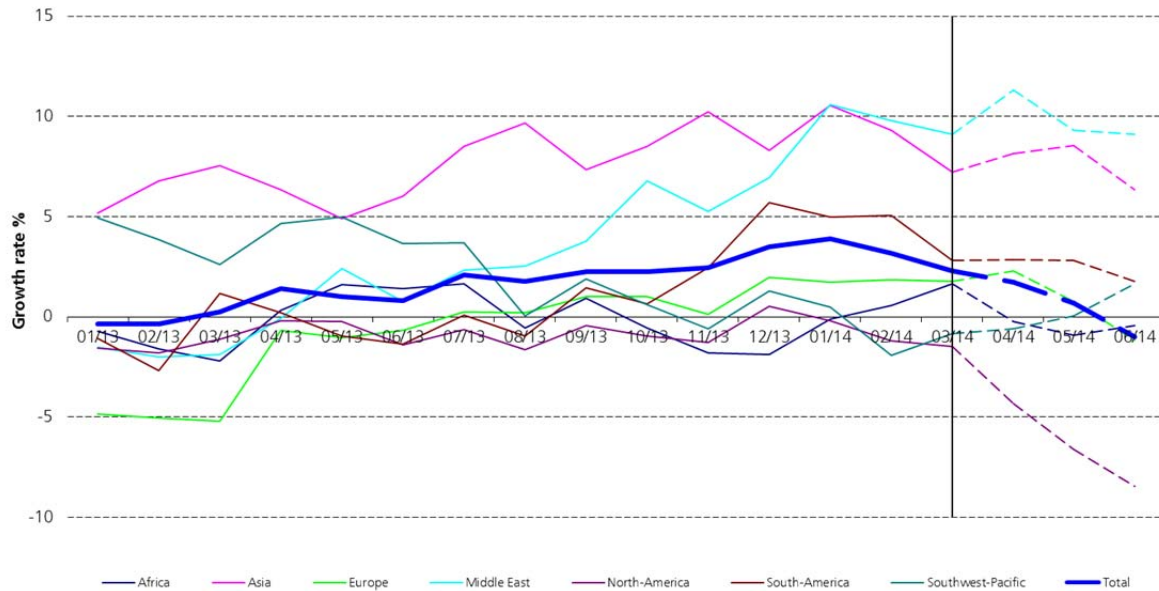
Development of the Global Air Transport Supply



Source: OAG 2013/2014, DLR 2013/2014

Fig. 1: Development of the Global Air Transport Supply

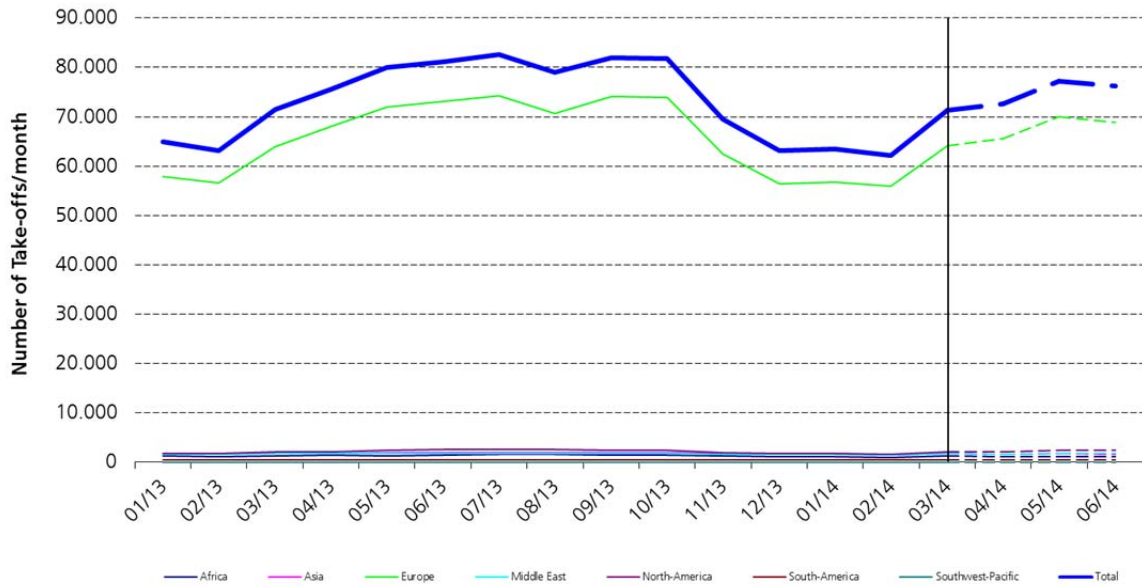
Changes in the Global Air Transport Supply



Source: OAG 2013/2014, DLR 2013/2014

Fig. 2: Changes in the Global Air Transport Supply

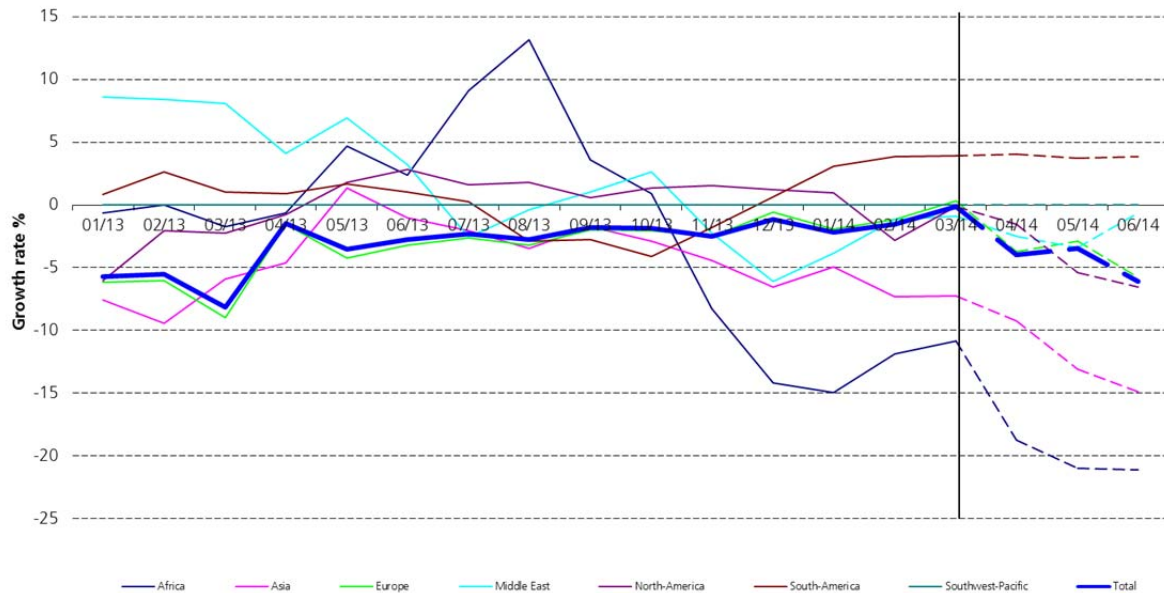
Development of the German Air Transport Supply



Source: OAG 2013/2014, DLR 2013/2014

Fig. 3: Development of the German Air Transport Supply

Changes in the German Air Transport Supply



Source: OAG 2013/2014, DLR 2013/2014

Fig. 4: Changes in the German Air Transport Supply

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