Flughafenwesen und Luftverkehr

Global Aviation Monitor (GAM)

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

September 2012

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 2011: Nearly 31.6 M flights (non-stop) worldwide
- Busiest month 2012: July with 2.84 M flights
- Air traffic showed declining growth rates slowly approaching values below 0% since May 2011
- Forecasting methodology: Time series analysis

Analysis: October 2011 – September 2012

Global

- September 2012: 2.66 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; stagnation in August 2012; small decrease (-1% in September)
- 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 South America
- Airports: Heterogeneous development of no. of flights offered; very strong increase at Istanbul, however decline at e.g. Madrid, Copenhagen and Milan Malpensa airport
- Airlines: Heterogeneous development of flights, some airlines e.g. Turkish Airways with strong growth, some growth in the low cost segment e.g. Ryanair, Easyjet, Wizz and Vueling, some airlines e.g. Iberia with decrease

Germany

- Airports: Some bigger airports e.g. Frankfurt, Berlin-Tegel with traffic growth, some smaller German airports e.g. Saarbruecken with downward trends
- Airlines: Heterogeneous developments of number of flights offered; strong growth of Turkish Airlines

Outlook: October 2012 – December 2012

Global

- For the next few months, a stagnation of traffic growth is expected

World Regions, Europe

- A small decrease of traffic growth in Europe of around 2% is expected

Germany

- For the next few month, a stagnation of traffic growth is expected

Rank	Airport	09/2012	Growth rate
1	Atlanta Hartsfield-Jackson Intl	36.549	-0,5
2	Chicago O'Hare International	35.949	-0,9
3	Dallas/Fort Worth Intl	25.978	0,6
4	Denver Intl	24.148	-2,0
5	Beijing Capital	23.581	3,5
6	Los Angeles International	22.948	-2,1
7	Frankfurt International	20.911	1,7
8	Charlotte	20.068	4,3
9	London Heathrow	19.834	-2,2
10	Paris Charles de Gaulle	19.454	-4,1
11	Houston George Bush Intercontinental	18.433	-6,8
12	Amsterdam	17.601	-2,0
13	Philadelphia International	16.778	-3,1
14	Toronto Lester B Pearson Intl	16.695	1,6
15	Detroit Wayne County	16.669	-5,7
16	San Francisco International	16.660	3,6
17	Munich International	16.426	-3,1
18	New York J F Kennedy International	16.414	-1,6
19	Tokyo Haneda	16.271	0,9
20	Jakarta Soekarno-Hatta	16.172	11,1
21	Madrid Barajas	15.844	-13,2
22	Newark Liberty International	15.669	0,3
23	Shanghai Pudong International	15.648	2,2
24	Minneapolis International	15.631	-2,9
25	Guangzhou	15.433	6,1

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

Rank	Airport	09/2012	Growth rate
1	Frankfurt International	20.911	1,7
2	Munich International	16.426	-3,1
3	Dusseldorf International	9.159	-3,2
4	Berlin Tegel	7.528	6,1
5	Hamburg	5.918	-5,5
6	Stuttgart	4.492	-6,2
7	Cologne/Bonn K.A.	3.993	-7,7
8	Berlin Schoenefeld	2.448	-2,3
9	Hanover	2.404	-3,3
10	Nuremberg	1.735	-8,3
11	Bremen	1.183	3,5
12	Frankfurt Hahn	990	-8,9
13	Leipzig/Halle	961	11,9
14	Dresden	931	-9,9
15	Dusseldorf Niederrhein	776	8,8
16	Dortmund	623	5,4
17	Munster	528	-26,6
18	Karlsruhe/Baden Baden	519	31,7
19	Friedrichshafen	404	-20,9
20	Memmingen	390	68,8
21	Paderborn	288	-23,2
22	Saarbrucken Ensheim	266	-22,2
23	Westerland	180	-12,2
24	Hamburg Luebeck	124	11,7
25	Saarbrucken Zweibruecken	80	17,6

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

Rank	Airport	09/2012	Growth rate
1	Frankfurt International	20.911	1,7
2	London Heathrow	19.834	-2,2
3	Paris Charles de Gaulle	19.454	-4,1
4	Amsterdam	17.601	-2,0
5	Munich International	16.426	-3,1
6	Madrid Barajas	15.844	-13,2
7	Istanbul Ataturk	15.269	14,8
8	Rome Fiumicino	14.266	-3,5
9	Barcelona	12.835	0,1
10	London Gatwick	11.096	-1,8
11	Vienna	10.692	-0,9
12	Moscow Domodedovo	10.404	3,7
13	Paris Orly	10.274	1,1
14	Zurich	9.990	-4,3
15	Copenhagen	9.762	-8,4
16	Oslo	9.501	1,1
17	Dusseldorf International	9.159	-3,2
18	Moscow Sheremetyevo International	8.851	0,5
19	Brussels	8.576	-4,8
20	Stockholm Arlanda	8.558	-5,5
21	Palma Mallorca	8.518	1,5
22	Berlin Tegel	7.528	6,1
23	Manchester International	7.315	-1,0
24	Nice	7.195	3,9
25	Milan Malpensa	7.120	-8,7

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

Source: OAG 2011/12, DLR 2011/12

Rank	Airline	09/2012	Growth rate
1	United Airlines	160.235	69,5
2	Delta Air Lines	154.246	-5,3
3	American Airlines	101.043	-2,0
4	Southwest Airlines	89.927	-3,3
5	US Airways	88.069	-4,5
6	Lufthansa German Airlines	60.400	-0,4
7	China Southern Airlines	53.172	6,6
8	Ryanair	49.338	9,2
9	Air Canada	47.247	-0,5
10	China Eastern Airlines	46.679	9,0
11	Air France	44.792	-3,2
12	easyJet	38.218	5,0
13	All Nippon Airways	33.803	2,6
14	Air China	32.123	-0,5
15	British Airways	29.335	10,6
16	Turkish Airlines	27.843	18,6
17	Gol Transportes Aereos	24.546	-8,2
18	TAM Linhas Aereas	24.421	-5,5
19	SAS Scandinavian Airlines	24.043	0,2
20	Alaska Airlines	23.862	3,1
21	Qantas Airways	22.649	2,4
22	JetBlue Airways Corporation	21.084	8,6
23	Lion Air	20.802	28,0
24	Japan Airlines International	20.784	3,4
25	Air Berlin	20.557	6,0

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

Rank	Airline	09/2012	Growth rate
1	Lufthansa German Airlines	56.013	-0,6
2	Ryanair	48.865	9,5
3	Air France	41.069	-3,7
4	easyJet	37.775	5,5
5	Turkish Airlines	24.718	17,7
6	British Airways	24.343	15,0
7	SAS Scandinavian Airlines	23.751	0,1
8	Air Berlin	20.054	5,2
9	Iberia	18.342	-15,2
10	KLM-Royal Dutch Airlines	17.058	2,8
11	Alitalia	16.253	-3,8
12	Flybe	16.117	7,1
13	Norwegian Air Shuttle	12.616	11,2
14	Swiss	11.990	1,0
15	Aeroflot Russian Airlines	11.366	17,3
16	Vueling Airlines	11.268	24,9
17	Austrian Airlines AG	10.911	-4,7
18	Wideroe's Flyveselskap	10.642	5,2
19	TAP Air Portugal	8.906	2,2
20	Aer Lingus	8.445	10,2
21	Pegasus Airlines	7.948	15,1
22	Finnair	7.479	-10,3
23	Wizz Air	7.100	78,0
24	LOT - Polish Airlines	6.883	-1,7
25	germanwings	6.765	5,2

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

Rank	Airline	09/2012	Growth rate
1	Lufthansa German Airlines	36.602	-0,1
2	Air Berlin	12.291	-2,5
3	germanwings	4.227	2,7
4	Ryanair	2.777	8,7
5	easyJet	1.787	1,1
6	Condor Flugdienst	1.777	6,2
7	Air France	1.633	-5,8
8	TUIfly	1.604	3,8
9	KLM-Royal Dutch Airlines	1.410	5,9
10	British Airways	1.132	1,5
11	Swiss	1.085	-3,1
12	Turkish Airlines	1.061	15,8
13	SAS Scandinavian Airlines	1.052	-9,2
14	Austrian Airlines AG	833	-16,6
15	LOT - Polish Airlines	680	-2,0
16	SunExpress	562	-11,2
17	Aeroflot Russian Airlines	525	4,2
18	United Airlines	496	83,7
19	Luxair	463	-22,6
20	OLT Ostfriesische Lufttransport GmbH	448	148,9
21	Intersky	443	-17,5
22	Iberia	360	-8,9
23	Wizz Air	347	10,9
24	Flybe	345	-18,4
25	SunExpress Deutschland	341	98,3

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

Source: OAG 2011/12, DLR 2011/12

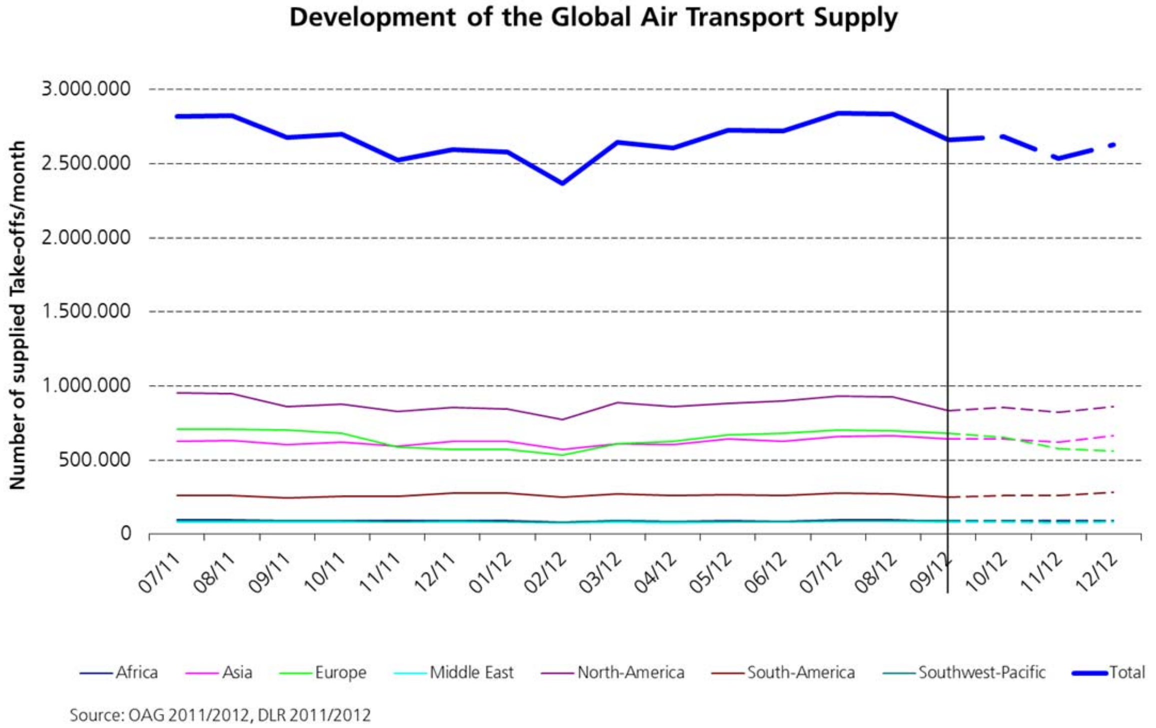

Fig. 1: Development of the Global Air Transport Supply

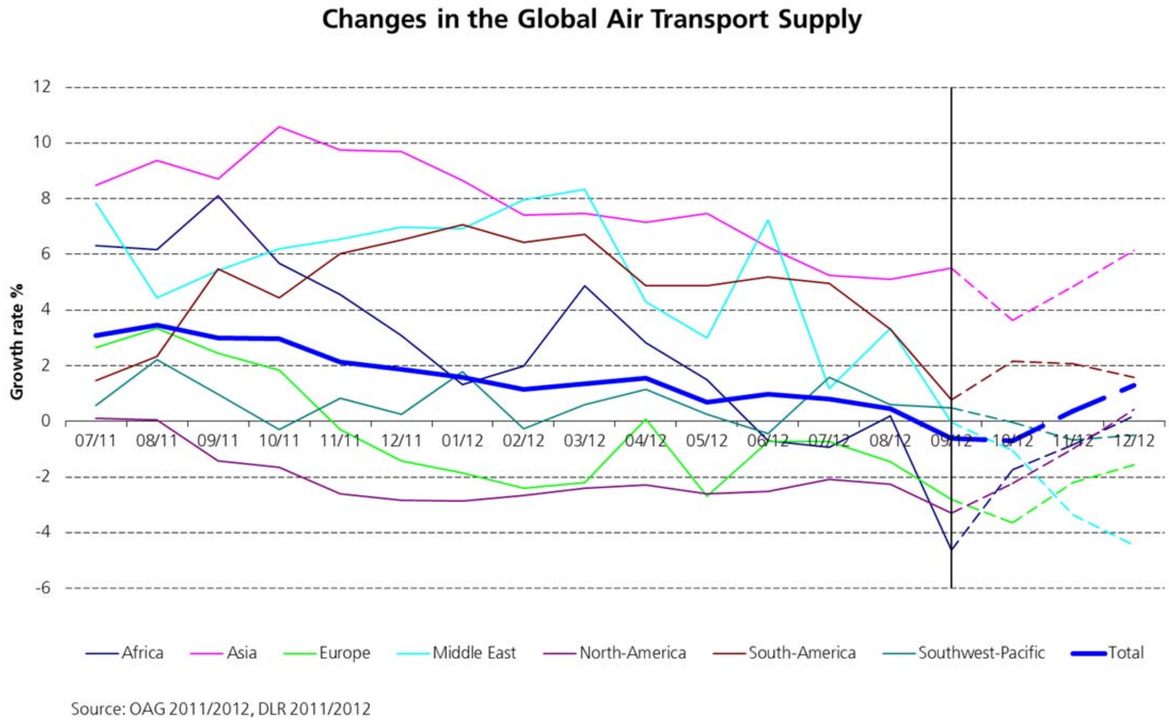

Fig. 2: Changes in the Global Air Transport Supply

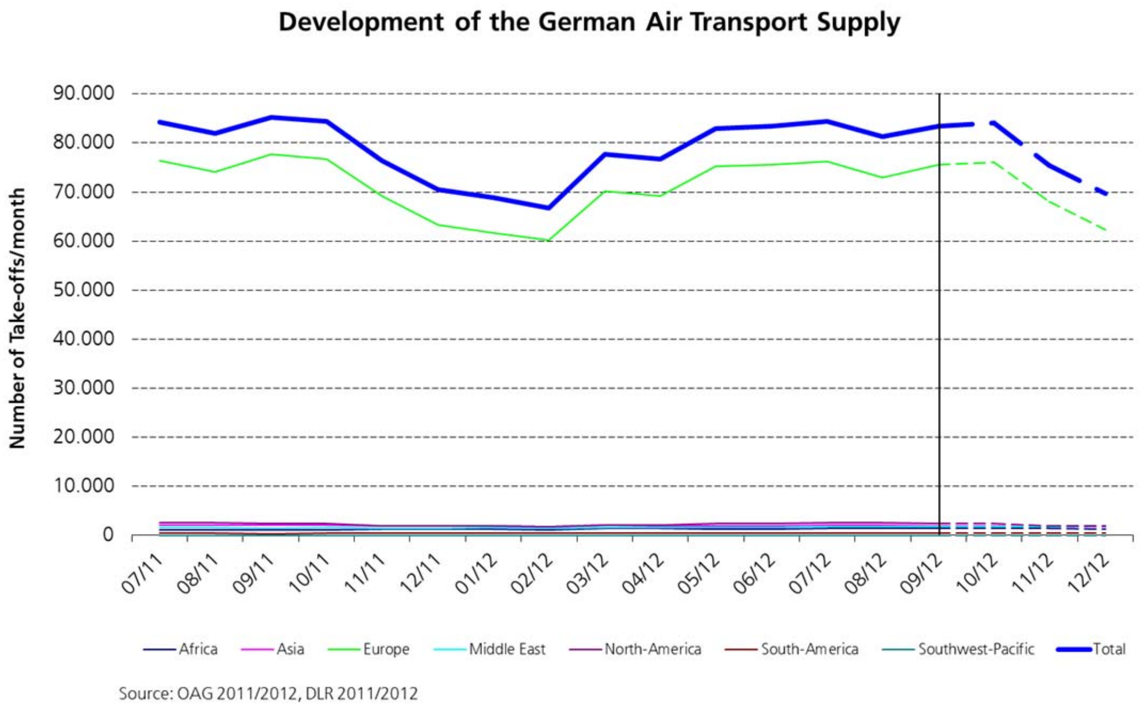

Fig. 3: Development of the German Air Transport Supply

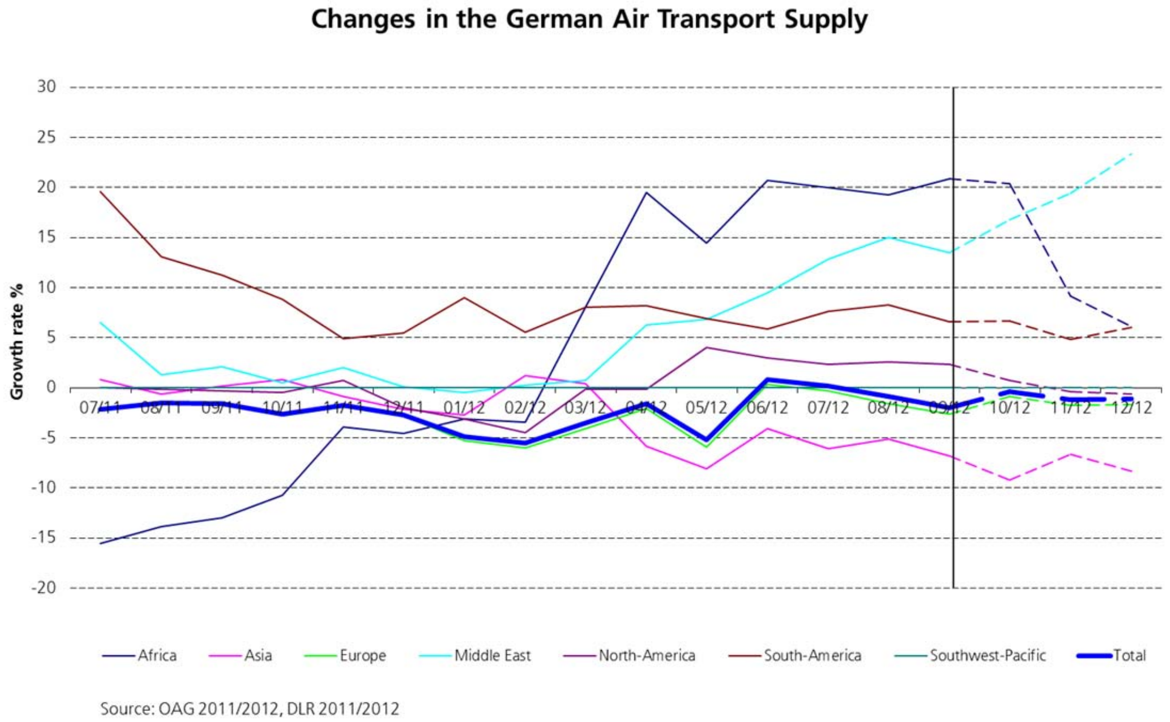

Fig. 4: Changes in the German Air Transport Supply

Authors:

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

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

Holger Pabst
DLR
Flughafenwesen und Luftverkehr
D-51147 Köln
E-Mail: holger.pabst@dlr.de

Dieter Wilken
DLR
Flughafenwesen und Luftverkehr
D-51147 Köln
E-Mail: dieter.wilken@dlr.de