Flughafenwesen und Luftverkehr

Global Aviation Monitor (GAM)

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

June 2010

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 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 showed downward trend since April 2008, with a turnaround in December 2009
- Forecasting methodology: Time series analysis

Analysis: July 2009 – June 2010

Global

- June 2010: 2.62 M flights supplied
- More than 9% decline in February 2009, 3% decline in July 2009, 0% in November, turnaround with 1% increase in December 2009, more than 3% growth in February and more than 5% in June compared to 2009
- Airports: Traffic growth at many airports worldwide; more and more large US airports show a rise; strong growth at Chicago, Detroit and Beijing airport
- Airlines: 7 out of the 10 biggest airlines are from USA, mostly now with increasing no. of flights offered; growth of chinese airlines, strong growth of Delta Airlines because of merger with former Northwest

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
- Airports: Increase in air transport supply at some European airports; with strong increase at e.g. Copenhagen and Moscow, however decline at Paris CDG
- Airlines: Small decline of flights of legacy carriers, except e.g. Alitalia and Turkish Airlines, growth in the low cost segment, e.g. Ryanair and Easyjet; Air Berlin inclusive some former TUIfly routes

Germany

- Airports: Heterogeneous traffic developments; more and more larger airports, e.g. BER 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: July 2010 – September 2010

Global

- For the next months, a traffic growth of up to 3-4% is expected

World Regions, Europe

- Small increase of 2-3% in Europe is expected

Germany

- For the next month, a traffic growth of up to 3-4% is expected

Rank	Airport	06/2010	Growth rate
1	Atlanta Hartsfield-Jackson Intl	40.345	-4,0
2	Chicago O'Hare International	37.697	7,6
3	Dallas/Fort Worth Intl	26.576	1,3
4	Denver Intl	26.349	1,7
5	Los Angeles International	23.201	5,4
6	Houston George Bush Intercontinental	21.979	-0,1
7	Beijing Capital	21.761	7,2
8	Charlotte	20.853	6,2
9	London Heathrow	20.037	1,4
10	Paris Charles de Gaulle	19.918	-5,1
11	Frankfurt International	19.837	2,3
12	Detroit Wayne County	19.526	7,2
13	Madrid Barajas	18.717	2,4
14	Philadelphia International	18.111	-3,5
15	Minneapolis International	17.487	-3,3
16	Amsterdam	16.637	0,8
17	New York J F Kennedy International	16.601	-9,5
18	Munich International	16.500	2,1
19	Newark Liberty International	16.332	-2,5
20	Toronto Lester B Pearson Intl	16.313	3,2
21	Phoenix Sky Harbor Intl .	16.092	-1,4
22	New York La Guardia	15.482	1,6
23	San Francisco International	15.431	-0,1
24	Boston Logan International	14.447	0,0
25	Seattle/Tacoma International	14.199	-0,2

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

Rank	Airport	06/2010	Growth rate
1	Frankfurt International	19.837	2,3
2	Munich International	16.500	2,1
3	Dusseldorf International	9.346	5,7
4	Berlin Tegel	6.663	6,7
5	Hamburg	6.306	8,7
6	Stuttgart	4.820	-1,9
7	Cologne/Bonn K.A.	4.614	7,1
8	Berlin Schoenefeld	2.559	11,9
9	Hanover	2.497	-2,0
10	Nuremberg	1.864	-1,4
11	Bremen	1.370	14,6
12	Frankfurt Hahn	1.354	-3,1
13	Dresden	1.142	9,5
14	Leipzig/Halle	1.054	0,0
15	Dusseldorf Niederrhein	902	22,7
16	Munster	734	-8,4
17	Friedrichshafen	672	33,3
18	Dortmund	575	9,7
19	Saarbrucken Ensheim	489	2,7
20	Karlsruhe/Baden Baden	457	7,5
21	Paderborn	392	-8,2
22	Memmingen	314	-14,7
23	Westerland	231	20,9
24	Hamburg Luebeck	194	-19,2
25	Mannheim	140	3,7

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

Rank	Airport	06/2010	Growth rate
1	London Heathrow	20.037	1,4
2	Paris Charles de Gaulle	19.918	-5,1
3	Frankfurt International	19.837	2,3
4	Madrid Barajas	18.717	2,4
5	Amsterdam	16.637	0,8
6	Munich International	16.500	2,1
7	Rome Fiumicino	14.167	2,6
8	Barcelona	11.718	0,3
9	Vienna	10.700	3,1
10	Copenhagen	10.676	10,0
11	Istanbul Ataturk	10.580	2,1
12	London Gatwick	10.302	-0,6
13	Paris Orly	10.109	4,8
14	Zurich	9.930	5,5
15	Dusseldorf International	9.346	5,7
16	Brussels	8.867	-1,3
17	Oslo	8.752	4,8
18	Stockholm Arlanda	7.890	5,7
19	Palma Mallorca	7.863	1,3
20	Athens Intl Eleftherios Venizelos	7.831	-6,4
21	Moscow Domodedovo	7.815	11,7
22	Milan Malpensa	7.776	5,0
23	Moscow Sheremetyevo International	7.327	20,7
24	Helsinki	6.783	2,4
25	Dublin	6.727	-0,0

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

Source: OAG 2009/10, DLR 2009/10

Rank	Airline	06/2010	Growth rate
1	Delta Air Lines	182.319	59,3
2	American Airlines	106.665	0,5
3	United Airlines	103.443	1,5
4	US Airways	97.673	-0,8
5	Southwest Airlines	96.955	0,8
6	Continental Airlines	76.820	-1,2
7	Lufthansa German Airlines	58.167	-0,6
8	Air Canada	47.020	2,8
9	China Southern Airlines	47.008	11,9
10	Air France	46.081	-4,1
11	Ryanair	42.169	16,9
12	China Eastern Airlines	37.805	7,0
13	easyJet	33.391	9,0
14	Air China	31.122	13,6
15	All Nippon Airways	29.373	-0,1
16	British Airways	25.977	-0,7
17	Iberia	25.379	-5,2
18	Alaska Airlines	25.267	0,1
19	TAM Linhas Aereas	24.962	-7,4
20	Gol Transportes Aereos	24.525	7,0
21	AirTran Airways	23.180	4,0
22	Air Berlin	23.031	27,9
23	SAS Scandinavian Airlines	22.598	-3,2
24	Japan Airlines International	21.641	-6,5
25	Qantas Airways	21.247	3,8

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

Rank	Airline	06/2010	Growth rate
1	Lufthansa German Airlines	34.909	-0,0
2	Air Berlin	13.791	28,5
3	germanwings	4.447	18,5
4	Ryanair	3.488	8,6
5	Air France	1.669	-8,5
6	easyJet	1.650	23,9
7	Condor Flugdienst	1.510	3,6
8	TUIfly	1.341	-63,9
9	KLM-Royal Dutch Airlines	1.264	-9,6
10	Austrian Airlines AG	1.247	-1,3
11	British Airways	1.150	-6,7
12	SAS Scandinavian Airlines	1.102	-6,7
13	Swiss	1.097	10,4
14	Cirrus Airlines	916	14,2
15	Turkish Airlines	830	5,6
16	Intersky	751	35,3
17	LOT - Polish Airlines	701	-0,1
18	Luxair	688	10,3
19	Flybe	631	12,1
20	Hamburg International	556	188,1
21	Aeroflot Russian Airlines	501	11,1
22	SunExpress	477	45,4
23	Czech Airlines	441	-2,6
24	Iberia	427	2,9
25	Pegasus Airlines	393	207,0

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

Rank	Airline	06/2010	Growth rate
1	Lufthansa German Airlines	54.106	-0,9
2	Air France	42.303	-4,3
3	Ryanair	41.662	16,1
4	easyJet	32.917	8,5
5	Iberia	24.101	-6,2
6	Air Berlin	22.754	27,5
7	SAS Scandinavian Airlines	22.363	-3,1
8	British Airways	20.903	-2,2
9	Turkish Airlines	19.181	16,1
10	Flybe	15.693	3,2
11	Alitalia	15.373	17,3
12	KLM-Royal Dutch Airlines	15.312	-3,9
13	Austrian Airlines AG	12.140	1,7
14	Swiss	11.443	4,5
15	Norwegian Air Shuttle	10.097	26,0
16	Wideroe's Flyveselskap	8.844	3,1
17	TAP Air Portugal	8.322	12,5
18	Vueling Airlines	7.682	107,1
19	Aeroflot Russian Airlines	7.581	17,3
20	LOT - Polish Airlines	7.108	8,6
21	Aer Lingus	7.072	8,1
22	germanwings	6.819	20,9
23	Brussels Airlines	6.757	8,9
24	Finnair	6.620	-0,2
25	Czech Airlines	6.208	-6,0

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

Source: OAG 2009/10, DLR 2009/10

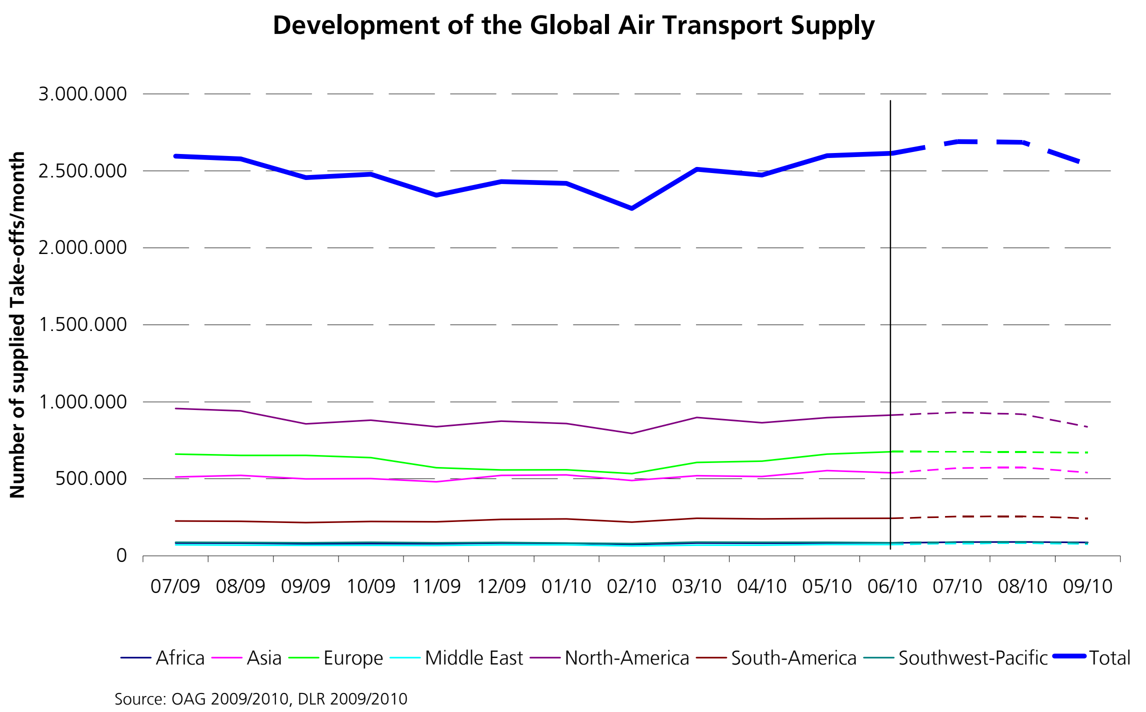

Fig. 1: Development of the Global Air Transport Supply

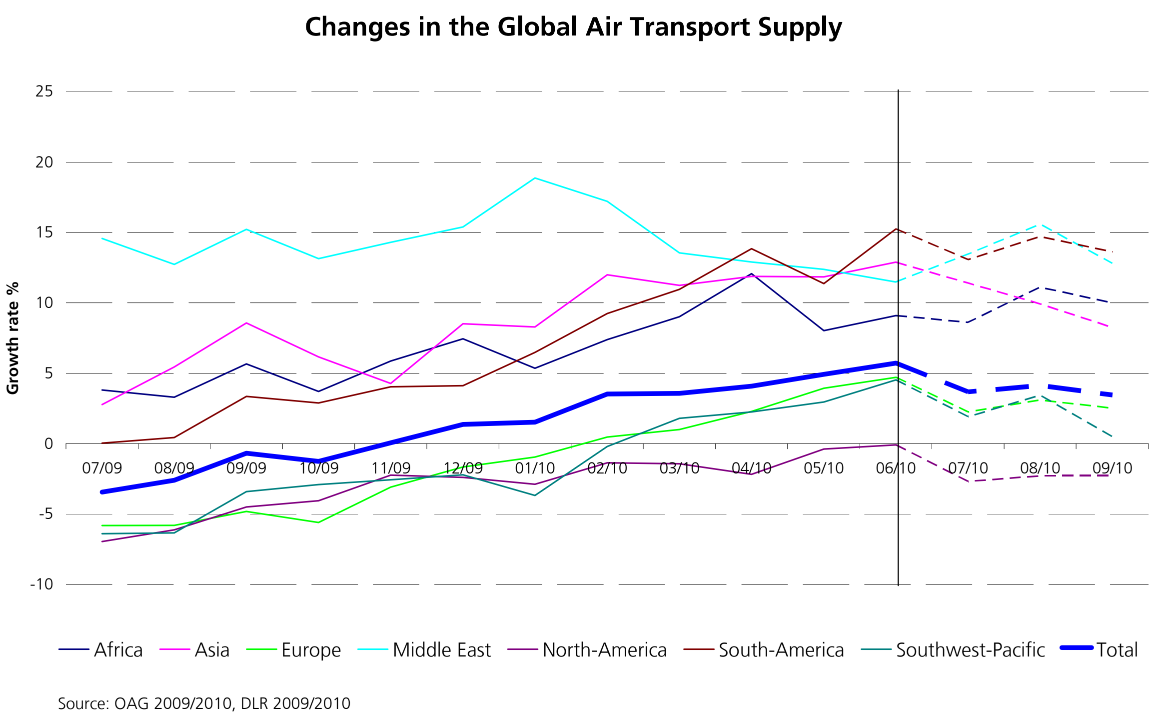

Fig. 2: Changes in the Global Air Transport Supply

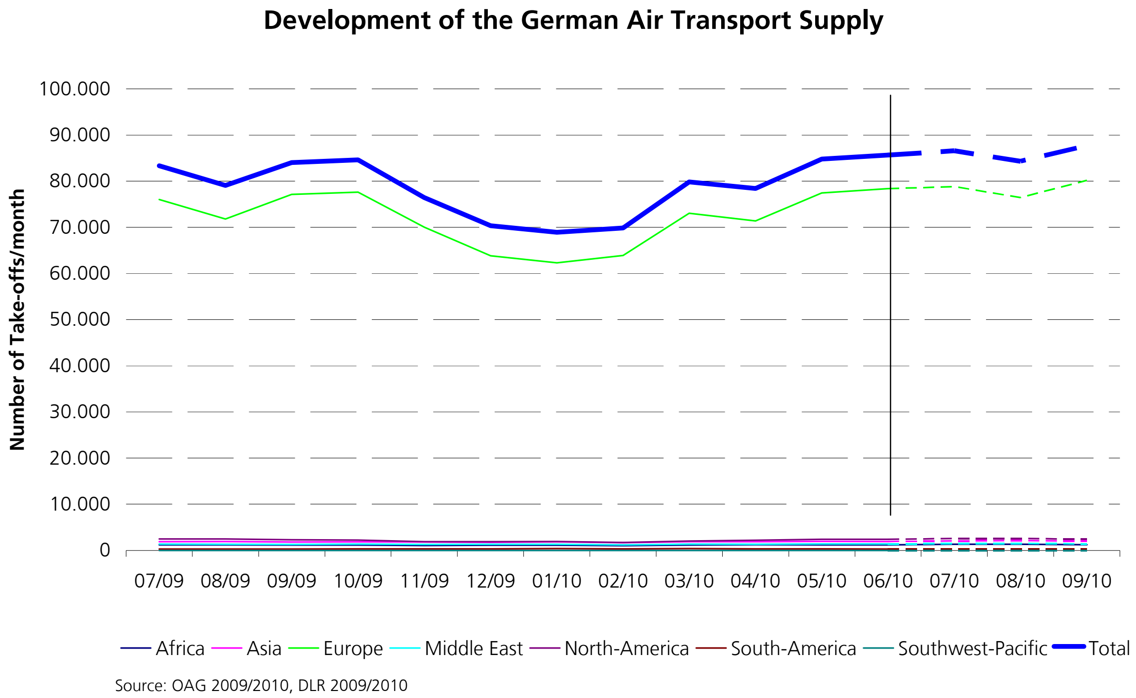

Fig. 3: Development of the German Air Transport Supply

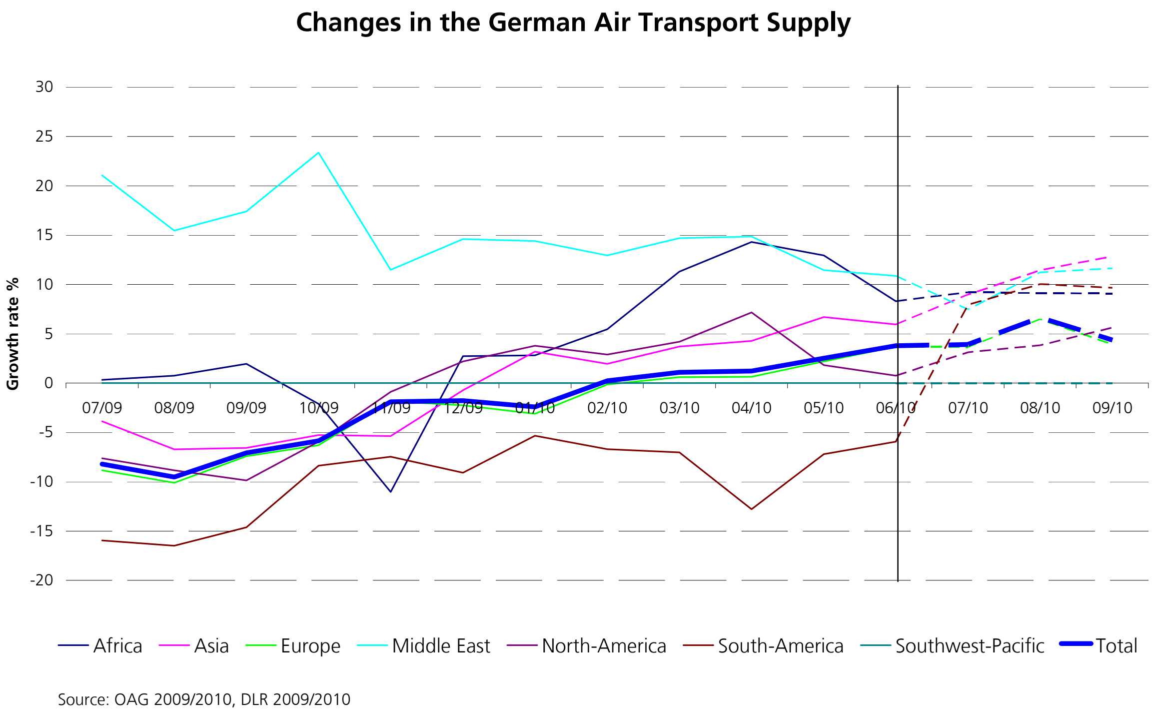

Fig. 4: Changes in the German Air Transport Supply

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