Flughafenwesen und Luftverkehr

Global Aviation Monitor (GAM)

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

June 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: July 2010 – June 2011

Global

- June 2011: 2.70 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, 5,8% in August 2010 and around 3.1% in June 2011 compared to 2010. In May there is a increase of 4.2% because of the low air transport supply in May 2010 because of the volcanic ashes from Iceland over Europe
- Airports: Traffic growth at most airports worldwide; most large US airports show a rise but with some downwards tendency; strong growth at Tokyo-Haneda
- Airlines: 6 out of the 10 biggest airlines are from USA, with heterogeneous developments of no. of flights offered; strong growth of TAM Linhas Aereas and All Nippon Airways

World Regions, Europe

- Increase of traffic worldwide since December 2009; small increase in North America, already strong growth in Asia and Middle East, but with downwards tendency
- Airports: Increase in air transport supply at most of the 10 biggest European airports but with downwards tendency; very strong increase at Istanbul, Moscow, Helsinki and Manchester, however decline at e.g. Athen airport
- Airlines: Increase of flights of some legacy carriers, except e.g. LOT and Aeroflot with strong growth, some growth in the low cost segment e.g. easyjet and Ryanair

Germany

- Airports: Most german airports with downwards tendency, only Frankfurt and Berlin TXL show a rise
- Airlines: Heterogeneous developments of number of flights offered; still decline in the Low Cost carrier segment except easyjet, strong decrease of Ryanair, some growth in the holiday carrier segment

Outlook: July 2011 – September

Global

- For the next months, a small decrease of the traffic growth is expected

World Regions, Europe

- Small decrease of the traffic growth in Europe is expected

Germany

- For the next month, a small decrease of the traffic growth is expected

Rank	Airport	06/2011	Growth rate
1	Atlanta Hartsfield-Jackson Intl	39.571	-1,9
2	Chicago O'Hare International	38.774	2,9
3	Denver Intl	27.035	2,6
4	Dallas/Fort Worth Intl	26.982	1,5
5	Los Angeles International	25.036	7,9
6	Beijing Capital	22.221	2,1
7	Houston George Bush Intercontinental	21.801	-0,8
8	Charlotte	21.544	3,3
9	Paris Charles de Gaulle	20.339	2,1
10	Frankfurt International	20.272	2,2
11	London Heathrow	20.075	0,2
12	Detroit Wayne County	19.072	-2,3
13	Madrid Barajas	18.161	-3,0
14	Philadelphia International	17.990	-0,7
15	Minneapolis International	17.822	1,9
16	New York J F Kennedy International	17.717	6,7
17	Amsterdam	17.701	6,4
18	Phoenix Sky Harbor Intl .	17.248	7,2
19	Newark Liberty International	16.876	3,3
20	Toronto Lester B Pearson Intl	16.541	1,4
21	Tokyo Haneda	16.337	17,1
22	Munich International	16.335	-1,0
23	San Francisco International	16.186	4,9
24	New York La Guardia	16.052	3,7
25	Boston Logan International	15.228	5,4

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

Rank	Airport	06/2011	Growth rate
1	Frankfurt International	20.272	2,2
2	Munich International	16.335	-1,0
3	Dusseldorf International	8.968	-4,0
4	Berlin Tegel	6.877	3,2
5	Hamburg	5.923	-6,1
6	Stuttgart	4.605	-4,5
7	Cologne/Bonn K.A.	4.113	-10,9
8	Berlin Schoenefeld	2.484	-2,9
9	Hanover	2.430	-2,7
10	Nuremberg	1.786	-4,2
11	Bremen	1.155	-15,7
12	Frankfurt Hahn	1.103	-18,5
13	Leipzig/Halle	1.050	-0,4
14	Dresden	971	-15,0
15	Dusseldorf Niederrhein	719	-20,3
16	Munster	675	-8,0
17	Dortmund	559	-2,8
18	Friedrichshafen	508	-24,4
19	Karlsruhe/Baden Baden	437	-4,4
20	Paderborn	367	-6,4
21	Saarbrucken Ensheim	355	-27,4
22	Memmingen	240	-23,6
23	Westerland	211	-8,7
24	Hamburg Luebeck	111	-42,8
25	Erfurt	104	-7,1

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

Rank	Airport	06/2011	Growth rate
1	Paris Charles de Gaulle	20.339	2,1
2	Frankfurt International	20.272	2,2
3	London Heathrow	20.075	0,2
4	Madrid Barajas	18.161	-3,0
5	Amsterdam	17.701	6,4
6	Munich International	16.335	-1,0
7	Rome Fiumicino	14.404	1,7
8	Istanbul Ataturk	12.912	22,0
9	Barcelona	12.831	9,5
10	London Gatwick	11.125	8,0
11	Vienna	10.644	-0,5
12	Copenhagen	10.417	-2,4
13	Zurich	10.253	3,3
14	Paris Orly	9.954	-1,5
15	Moscow Domodedovo	9.834	25,8
16	Dusseldorf International	8.968	-4,0
17	Brussels	8.783	-0,9
18	Oslo	8.674	-0,9
19	Palma Mallorca	8.306	5,6
20	Stockholm Arlanda	8.264	4,7
21	Moscow Sheremetyevo International	8.126	10,9
22	Milan Malpensa	7.627	-1,9
23	Helsinki	7.598	12,0
24	Manchester International	7.338	11,9
25	Athens Intl Eleftherios Venizelos	7.088	-9,5

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

Source: OAG 2010/11, DLR 2010/11

Rank	Airline	06/2011	Growth rate
1	Delta Air Lines	178.216	-2,3
2	American Airlines	109.587	2,7
3	United Airlines	103.078	-0,4
4	Southwest Airlines	100.596	3,8
5	US Airways	99.304	1,7
6	Continental Airlines	75.503	-1,7
7	Lufthansa German Airlines	58.508	0,6
8	China Southern Airlines	48.633	3,5
9	Air Canada	47.809	1,7
10	Ryanair	46.091	9,3
11	Air France	45.256	-1,8
12	China Eastern Airlines	39.924	5,6
13	easyJet	35.270	5,6
14	All Nippon Airways	33.028	12,4
15	Air China	31.598	1,5
16	TAM Linhas Aereas	27.674	10,9
17	British Airways	26.272	1,1
18	Gol Transportes Aereos	25.876	5,5
19	Alaska Airlines	24.861	-1,6
20	AirTran Airways	23.431	1,1
21	Iberia	22.828	-10,1
22	Turkish Airlines	22.664	7,7
23	Air Berlin	21.650	-6,0
24	Qantas Airways	21.566	1,5
25	SAS Scandinavian Airlines	21.532	-4,7

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

Rank	Airline	06/2011	Growth rate
1	Lufthansa German Airlines	34.728	-0,5
2	Air Berlin	12.874	-6,6
3	germanwings	4.029	-9,4
4	Ryanair	2.578	-26,1
5	easyJet	1.784	8,1
6	Air France	1.690	1,3
7	Condor Flugdienst	1.647	9,1
8	TUIfly	1.532	14,2
9	KLM-Royal Dutch Airlines	1.317	4,2
10	Swiss	1.119	2,0
11	British Airways	1.102	-4,2
12	SAS Scandinavian Airlines	1.061	-3,7
13	Austrian Airlines AG	937	-24,9
14	Turkish Airlines	806	-2,9
15	SunExpress	794	66,5
16	Cirrus Airlines	672	-26,6
17	LOT - Polish Airlines	672	-4,1
18	Luxair	638	-7,3
19	Intersky	534	-28,9
20	Aeroflot Russian Airlines	505	0,8
21	Flybe	502	-20,4
22	Iberia	398	-6,8
23	Finnair	355	32,5
24	Czech Airlines	349	-20,9
25	Pegasus Airlines	349	-11,2

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

Rank	Airline	06/2011	Growth rate
1	Lufthansa German Airlines	54.214	0,2
2	Ryanair	45.460	9,1
3	Air France	41.530	-1,8
4	easyJet	34.679	5,4
5	Iberia	21.375	-11,3
6	Air Berlin	21.338	-6,2
7	SAS Scandinavian Airlines	21.267	-4,9
8	British Airways	20.961	0,3
9	Turkish Airlines	20.386	6,3
10	KLM-Royal Dutch Airlines	16.569	8,2
11	Alitalia	16.067	4,5
12	Flybe	15.426	-1,7
13	Swiss	11.883	3,8
14	Austrian Airlines AG	11.074	-8,8
15	Norwegian Air Shuttle	10.622	5,2
16	Wideroe's Flyveselskap	9.475	7,1
17	Aeroflot Russian Airlines	9.376	23,7
18	Vueling Airlines	9.008	17,3
19	TAP Air Portugal	8.464	1,7
20	Aer Lingus	7.755	9,7
21	Finnair	7.564	14,3
22	Pegasus Airlines	6.771	32,8
23	LOT - Polish Airlines	6.739	69,0
24	Brussels Airlines	6.656	-1,5
25	Wizz Air	6.323	14,4

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

Source: OAG 2010/11, DLR 2010/11

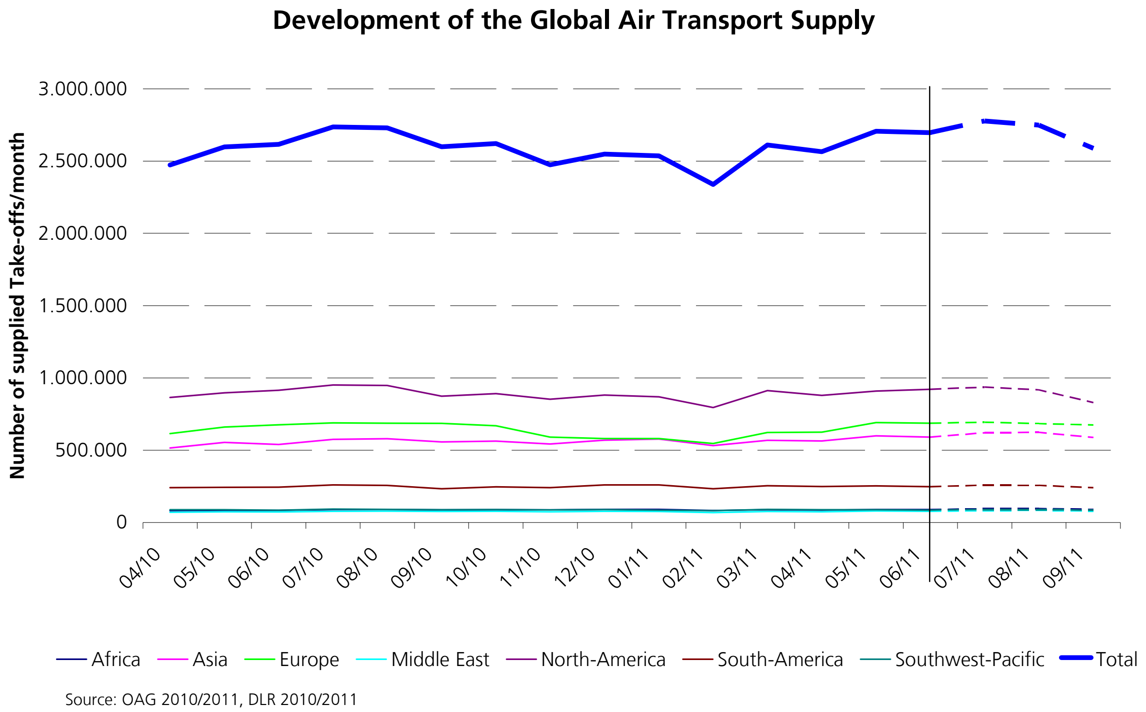

Fig. 1: Development of the Global Air Transport Supply

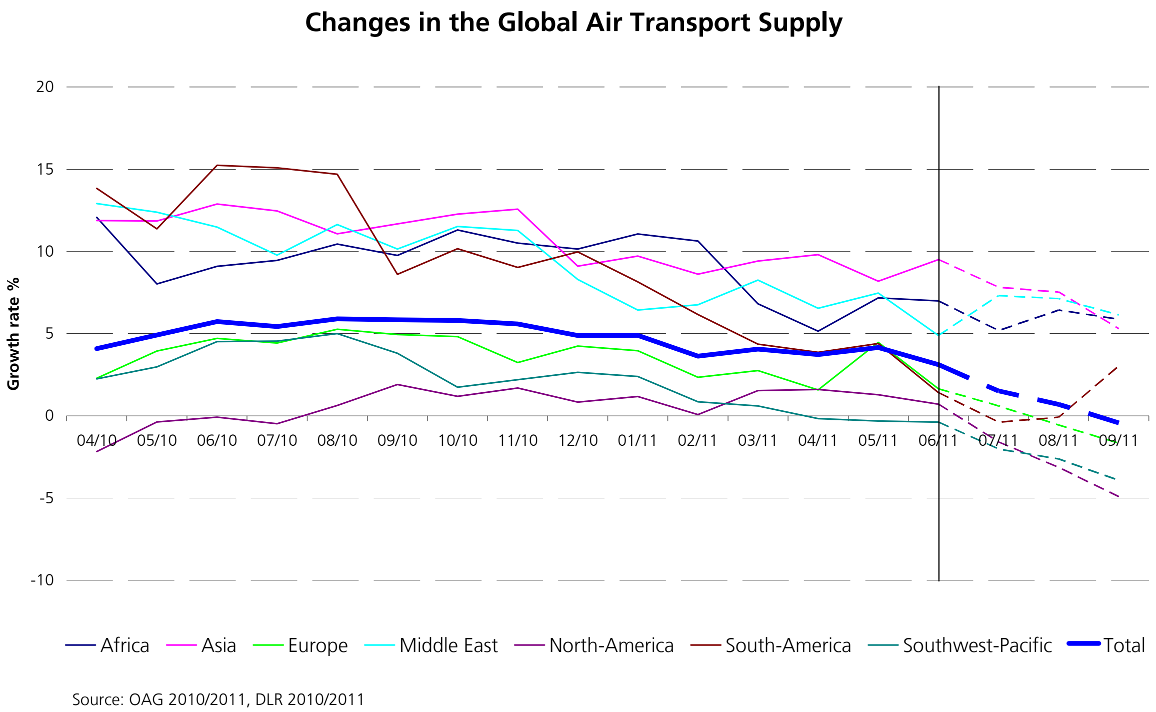

Fig. 2: Changes in the Global Air Transport Supply

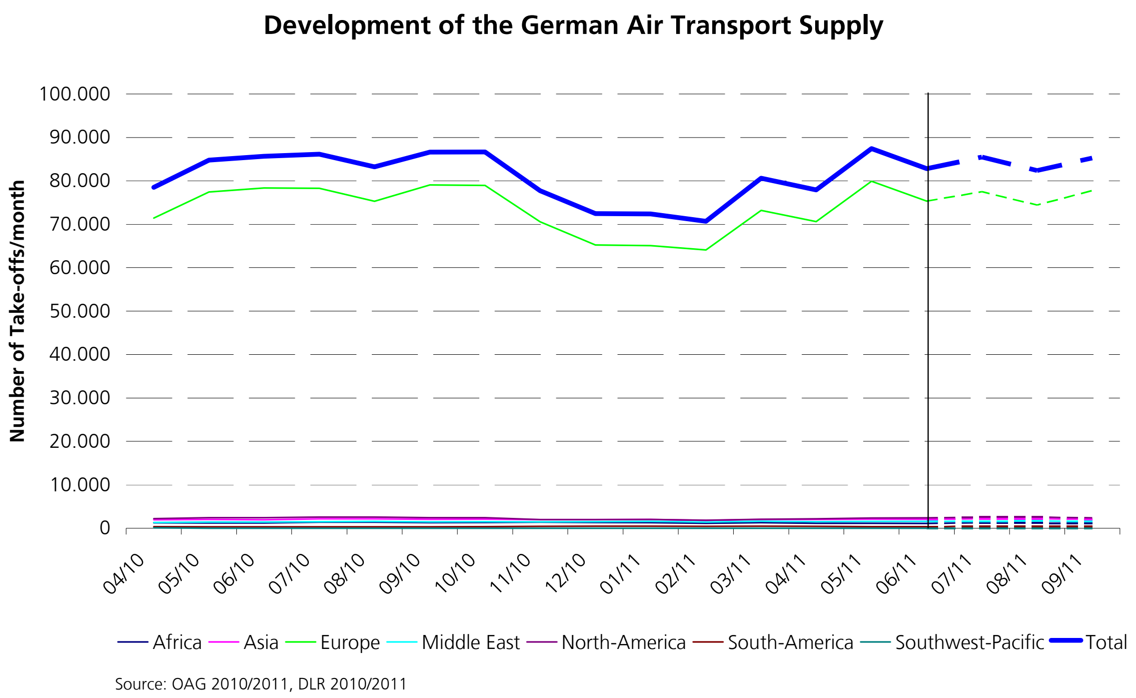

Fig. 3: Development of the German Air Transport Supply

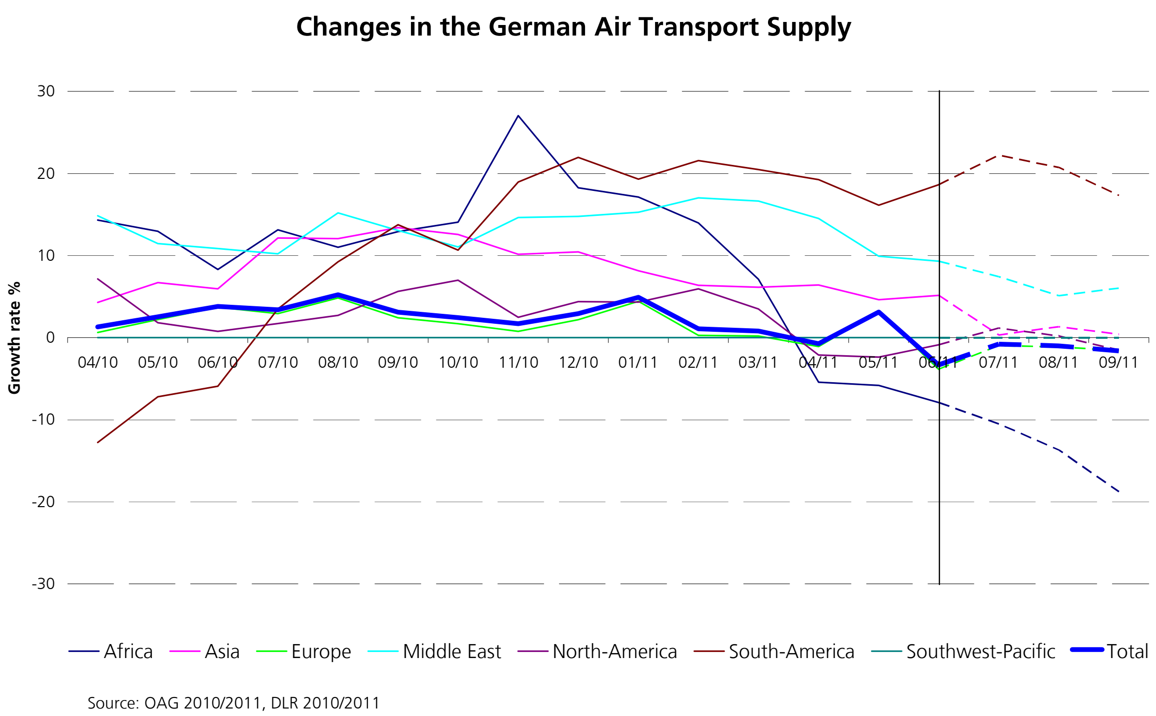

Fig. 4: Changes in the German Air Transport Supply

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