

Global Aviation Monitor (GAM)

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

September 2010



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; 2010 until now: 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: October 2009 – September 2010

Global

- September 2010: 2.60 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 5,7% in June and 5,8% in September compared to 2009
- Airports: Traffic growth at most airports worldwide; more and more large US airports show a rise; strong growth at Detroit, Charlotte, Chicago and Beijing airport
- Airlines: 6 out of the 10 biggest airlines are from USA, most of them with increasing no. of flights offered; growth of chinese airlines and Ryanair, strong growth of Delta Airlines because of merger with former Northwest

World Regions, Europe

- Increase of traffic worldwide since December 2009; increase in Europe, small decrease in North America, already strong growth in Asia and Middle East
- Airports: Increase in air transport supply at most European airports; with strong increase at e.g. Copenhagen and Moscow, however decline at Athens and Brussels
- Airlines: Small increase of flights of some legacy carriers, except e.g. Alitalia and Turkish Airlines with strong growth, strong growth in the low cost segment, e.g. Ryanair and Easyjet too; Air Berlin inclusive some former TUIfly routes

Germany

- Airports: Heterogeneous traffic developments; larger airports, e.g. BER show a rise, some small airports with decrease air transport supply
- Airlines: Heterogeneous developments of number of flights offered; still decline in the legacy carrier segment except Lufthansa, large growth in the low cost segment

Outlook: October 2010 – December 2010

Global

- For the next months, a traffic growth of around 5% is expected

World Regions, Europe

- Increase of 4-5% in Europe is expected

Germany

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

Rank	Airport	09/2010	Growth rate
1	Atlanta Hartsfield-Jackson Intl	38.065	-1,7
2	Chicago O'Hare International	36.924	8,4
3	Dallas/Fort Worth Intl	25.987	1,5
4	Denver Intl	25.428	7,0
5	Beijing Capital	22.339	7,7
6	Los Angeles International	21.975	4,0
7	Charlotte	20.647	11,8
8	London Heathrow	20.150	5,9
9	Frankfurt International	20.078	4,4
10	Paris Charles de Gaulle	19.975	-1,5
11	Houston George Bush Intercontinental	19.720	0,2
12	Madrid Barajas	18.606	2,9
13	Detroit Wayne County	18.440	11,3
14	Philadelphia International	17.544	0,7
15	Munich International	16.823	2,6
16	Amsterdam	16.685	1,8
17	Minneapolis International	16.595	6,9
18	New York J F Kennedy International	16.273	0,9
19	Toronto Lester B Pearson Intl	16.095	5,0
20	Phoenix Sky Harbor Intl .	15.541	1,0
21	New York La Guardia	15.524	5,3
22	Newark Liberty International	15.100	-1,8
23	San Francisco International	15.089	3,4
24	Rome Fiumicino	14.351	4,5
25	Boston Logan International	14.221	4,4

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

Rank	Airport	09/2010	Growth rate
1	Frankfurt International	20.078	4,4
2	Munich International	16.823	2,6
3	Dusseldorf International	9.426	4,1
4	Berlin Tegel	6.786	5,6
5	Hamburg	6.379	4,0
6	Stuttgart	4.859	-2,4
7	Cologne/Bonn K.A.	4.519	2,1
8	Berlin Schoenefeld	2.599	9,4
9	Hanover	2.487	-3,0
10	Nuremberg	1.934	-4,7
11	Bremen	1.380	12,6
12	Frankfurt Hahn	1.360	-3,8
13	Leipzig/Halle	1.135	6,4
14	Dresden	1.116	3,3
15	Dusseldorf Niederrhein	945	13,9
16	Munster	734	-9,6
17	Friedrichshafen	649	28,0
18	Dortmund	562	4,7
19	Saarbrücken/Ennsheim	469	-3,5
20	Karlsruhe/Baden Baden	448	3,0
21	Paderborn	366	4,6
22	Memmingen	329	-15,4
23	Westerland	230	27,1
24	Hamburg Luebeck	186	-26,5
25	Mannheim	142	5,2

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

Rank	Airport	09/2010	Growth rate
1	London Heathrow	20.150	5,9
2	Frankfurt International	20.078	4,4
3	Paris Charles de Gaulle	19.975	-1,5
4	Madrid Barajas	18.606	2,9
5	Munich International	16.823	2,6
6	Amsterdam	16.685	1,8
7	Rome Fiumicino	14.351	4,5
8	Barcelona	12.275	7,7
9	Istanbul Ataturk	10.985	3,0
10	London Gatwick	10.729	0,1
11	Copenhagen	10.638	8,9
12	Vienna	10.624	0,5
13	Zurich	10.048	5,1
14	Paris Orly	10.037	5,7
15	Dusseldorf International	9.426	4,1
16	Oslo	9.207	3,9
17	Brussels	8.876	-1,2
18	Stockholm Arlanda	8.477	6,2
19	Palma Mallorca	7.940	1,9
20	Moscow Domodedovo	7.897	11,8
21	Milan Malpensa	7.897	6,3
22	Athens Intl Eleftherios Venizelos	7.758	-9,3
23	Helsinki	7.590	5,6
24	Moscow Sheremetyevo International	7.267	18,2
25	Nice	6.846	4,5

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

Source: OAG 2009/10, DLR 2009/10

Rank	Airline	09/2010	Growth rate
1	Delta Air Lines	171.421	70,7
2	American Airlines	103.494	0,6
3	United Airlines	99.578	3,7
4	US Airways	94.780	2,1
5	Southwest Airlines	91.511	1,9
6	Continental Airlines	68.237	-1,9
7	Lufthansa German Airlines	59.048	0,6
8	China Southern Airlines	50.208	10,2
9	Air Canada	46.663	4,2
10	Air France	45.620	-0,9
11	Ryanair	43.652	15,7
12	China Eastern Airlines	40.133	10,3
13	easyJet	34.679	8,5
14	Air China	32.308	12,6
15	All Nippon Airways	30.127	1,9
16	TAM Linhas Aereas	28.238	7,2
17	British Airways	26.161	3,7
18	Iberia	25.239	-3,2
19	Gol Transportes Aereos	24.941	8,5
20	SAS Scandinavian Airlines	23.734	-0,4
21	Alaska Airlines	23.104	-2,1
22	Air Berlin	22.660	23,8
23	Japan Airlines International	21.748	-5,2
24	Qantas Airways	21.741	6,6
25	Turkish Airlines	21.677	16,2

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

Rank	Airline	09/2010	Growth rate
1	Lufthansa German Airlines	35.593	0,4
2	Air Berlin	13.615	23,0
3	germanwings	4.458	17,3
4	Ryanair	3.545	4,7
5	Air France	1.664	-6,7
6	easyJet	1.656	21,9
7	Condor Flugdienst	1.584	7,2
8	TUIfly	1.391	-62,8
9	KLM-Royal Dutch Airlines	1.270	-7,8
10	Austrian Airlines AG	1.256	-2,0
11	British Airways	1.213	4,3
12	SAS Scandinavian Airlines	1.125	-5,6
13	Swiss	1.098	6,7
14	Cirrus Airlines	903	5,5
15	Turkish Airlines	815	0,9
16	Intersky	735	31,3
17	LOT - Polish Airlines	665	-5,3
18	Luxair	655	5,0
19	Flybe	639	5,3
20	SunExpress	573	66,6
21	Hamburg International	532	183,0
22	Aeroflot Russian Airlines	500	5,5
23	Pegasus Airlines	441	80,0
24	Iberia	428	5,9
25	Czech Airlines	410	-9,7

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

Rank	Airline	09/2010	Growth rate
1	Lufthansa German Airlines	54.913	0,1
2	Ryanair	43.143	15,1
3	Air France	41.978	-1,1
4	easyJet	34.189	8,0
5	Iberia	23.915	-4,0
6	SAS Scandinavian Airlines	23.503	-0,4
7	Air Berlin	22.377	23,6
8	British Airways	21.233	3,1
9	Turkish Airlines	19.701	16,0
10	Alitalia	15.760	24,3
11	KLM-Royal Dutch Airlines	15.291	-3,1
12	Flybe	15.155	2,9
13	Austrian Airlines AG	12.162	-0,1
14	Swiss	11.448	2,9
15	Norwegian Air Shuttle	10.403	19,1
16	Wideroe's Flyveselskap	9.252	5,4
17	TAP Air Portugal	8.445	7,3
18	Vueling Airlines	7.938	11,7
19	Aeroflot Russian Airlines	7.673	15,9
20	Finnair	7.457	3,8
21	Aer Lingus	7.335	15,3
22	germanwings	6.857	19,4
23	Brussels Airlines	6.810	8,7
24	LOT - Polish Airlines	6.688	-3,3
25	Olympic Airlines	6.112	-17,1

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

Source: OAG 2009/10, DLR 2009/10

Development of the Global Air Transport Supply

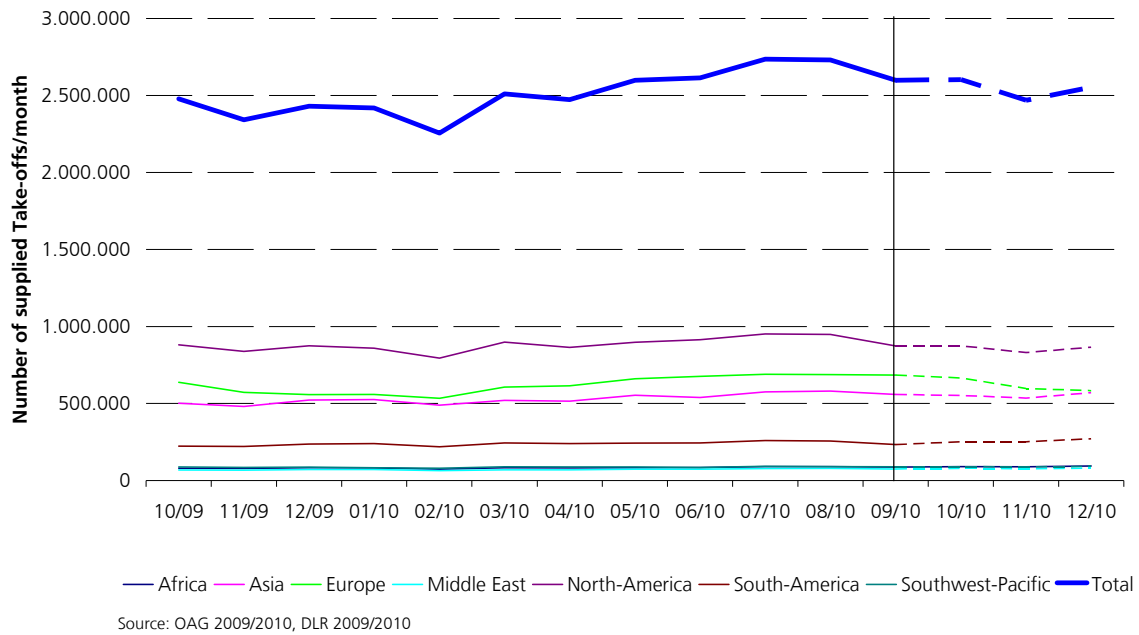


Fig. 1: Development of the Global Air Transport Supply

Changes in the Global Air Transport Supply

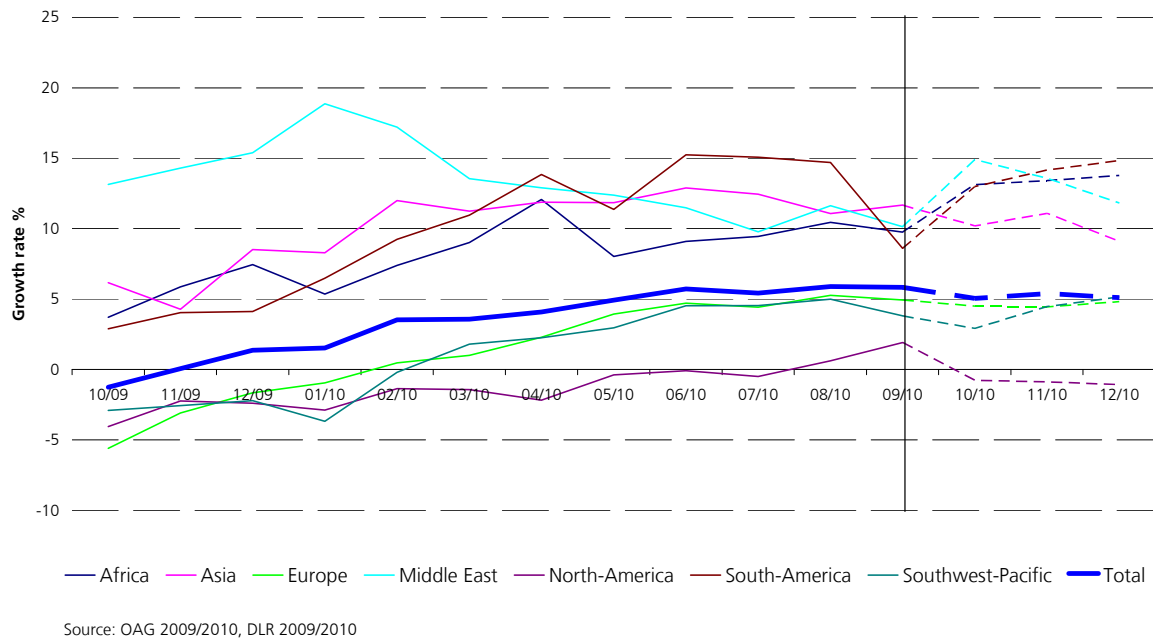


Fig. 2: Changes in the Global Air Transport Supply

Development of the German Air Transport Supply

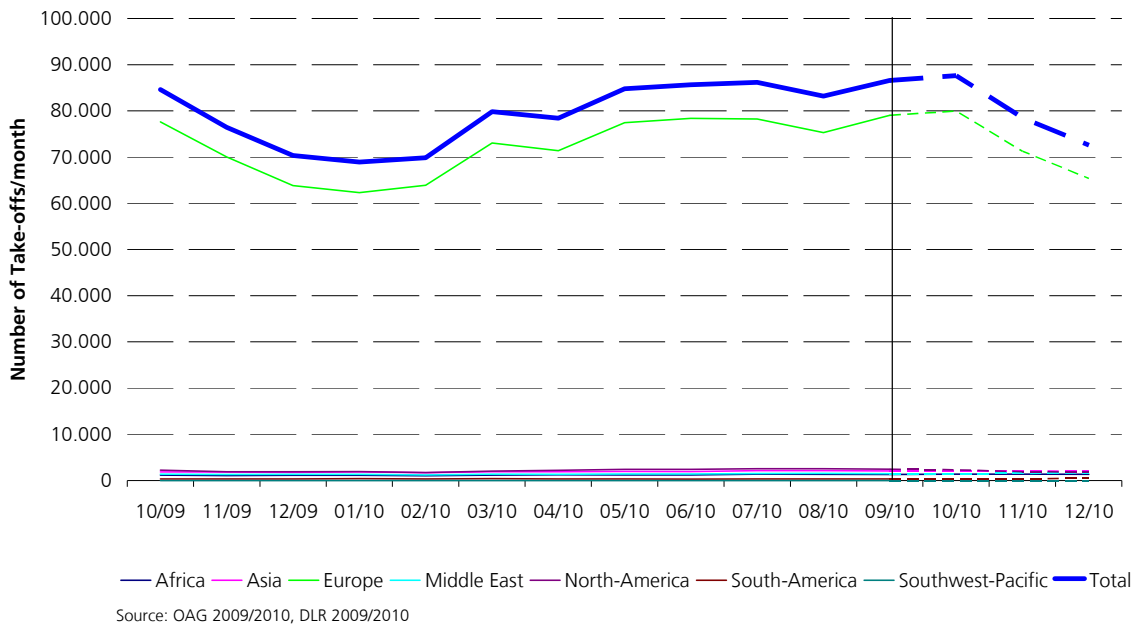


Fig. 3: Development of the German Air Transport Supply

Changes in the German Air Transport Supply

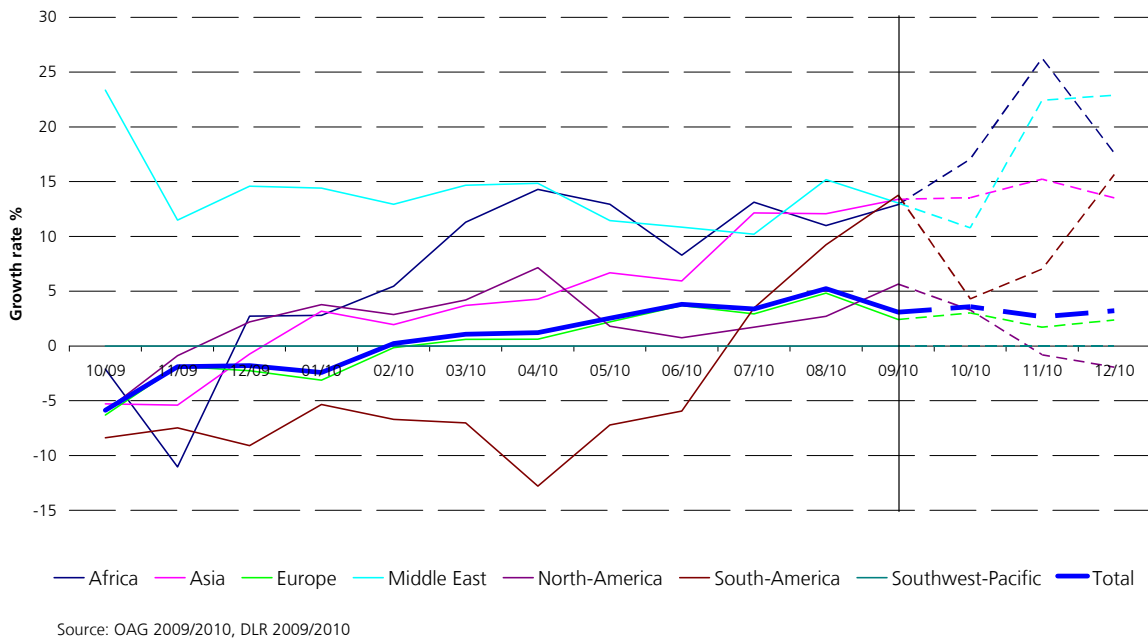


Fig. 4: Changes in the German Air Transport Supply

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