Flughafenwesen und Luftverkehr

Global Aviation Monitor (GAM)

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

December 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; 2011: August with 2.82 M flights
- Air traffic showed downward trend since April 2008, with a turnaround in December 2009
- Forecasting methodology: Time series analysis

Analysis: January 2011 – December 2011

Global

- December 2011: 2.60 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 about 2.0% in December 2011 compared to 2010.
- Airports: Most large US airports show some downwards tendency; strong growth at Guangzhou and Jakarta
- Airlines: 6 out of the 10 biggest airlines are from USA, with downwards tendency of no. of flights offered; strong growth of Turkish Airways

World Regions, Europe

- Increase of traffic worldwide since December 2009; small decrease in North America, already strong growth in Asia and Middle East
- Airports: Heterogeneous development in air transport supply at most of the 10 biggest European airports; very strong increase at Istanbul, Moscow, however decline at e.g. Milan Malpensa 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. Wizz and easyJet but decrease of Air Berlin and Ryanair

Germany

- Airports: Most German airports with downwards tendency, only the biggest airports Frankfurt, and Stuttgart show a rise
- Airlines: Heterogeneous developments of number of flights offered; still decline in the low cost carrier segment, strong decrease of Ryanair, strong growth of NIKI and Aeroflot

Outlook: January 2012 – March 2012

Global

- For the next few months, an increase of the traffic of around 4-5% growth is expected

World Regions, Europe

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

Germany

- For the next few month, a small decrease of the traffic of around 3% growth is expected

Rank	Airport	12/2011	Growth rate
1	Atlanta Hartsfield-Jackson Intl	36.347	-5,3
2	Chicago O'Hare International	34.620	-5,0
3	Dallas/Fort Worth Intl	25.300	-4,3
4	Denver Intl	24.846	-3,5
5	Los Angeles International	23.749	5,0
6	Beijing Capital	22.703	2,5
7	Houston George Bush Intercontinental	21.607	-1,9
8	Charlotte	21.262	-0,1
9	London Heathrow	19.258	-0,2
10	Frankfurt International	18.929	1,8
11	Paris Charles de Gaulle	18.828	-1,1
12	Philadelphia International	17.518	-0,8
13	Phoenix Sky Harbor Intl .	17.106	1,3
14	Tokyo Haneda	16.987	4,6
15	Detroit Wayne County	16.711	-6,1
16	Newark Liberty International	16.455	2,1
17	Madrid Barajas	16.135	-6,4
18	New York J F Kennedy International	16.110	-6,0
19	Amsterdam	15.946	4,2
20	San Francisco International	15.922	5,1
21	Guangzhou	15.537	11,2
22	Minneapolis International	15.395	-7,6
23	Toronto Lester B Pearson Intl	15.325	-0,7
24	Mexico City Juarez International	15.322	-2,8
25	Jakarta Soekarno-Hatta	15.284	10,9

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

Rank	Airport	12/2011	Growth rate
1	Frankfurt International	18.929	1,8
2	Munich International	14.172	0,0
3	Dusseldorf International	7.283	-2,4
4	Berlin Tegel	6.036	0,8
5	Hamburg	5.105	-1,9
6	Stuttgart	3.664	2,3
7	Cologne/Bonn K.A.	3.197	-4,3
8	Berlin Schoenefeld	2.219	-10,7
9	Hanover	1.920	-1,2
10	Nuremberg	1.662	-6,9
11	Bremen	987	-11,7
12	Dresden	812	-10,7
13	Frankfurt Hahn	803	-17,4
14	Leipzig/Halle	705	-25,9
15	Dortmund	473	6,8
16	Munster	456	-26,7
17	Dusseldorf Niederrhein	441	-40,0
18	Friedrichshafen	396	-20,2
19	Saarbrucken Ensheim	261	-13,0
20	Karlsruhe/Baden Baden	250	-18,6
21	Paderborn	195	-23,5
22	Memmingen	164	-15,5
23	Hamburg Luebeck	59	-34,4
24	Mannheim	48	-21,3
25	Erfurt	44	-37,1

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

Rank	Airport	12/2011	Growth rate
1	London Heathrow	19.258	-0,2
2	Frankfurt International	18.929	1,8
3	Paris Charles de Gaulle	18.828	-1,1
4	Madrid Barajas	16.135	-6,4
5	Amsterdam	15.946	4,2
6	Munich International	14.172	0,0
7	Istanbul Ataturk	12.898	21,5
8	Rome Fiumicino	12.256	-5,4
9	Barcelona	10.615	-0,7
10	Moscow Domodedovo	9.393	6,2
11	Zurich	9.373	-0,9
12	Vienna	9.235	-3,0
13	Paris Orly	9.183	-0,2
14	Copenhagen	8.752	-0,3
15	Moscow Sheremetyevo International	8.641	26,9
16	London Gatwick	8.542	-0,6
17	Oslo	7.672	4,0
18	Brussels	7.374	-7,1
19	Dusseldorf International	7.283	-2,4
20	Stockholm Arlanda	7.185	7,6
21	Milan Malpensa	6.419	-14,1
22	Helsinki	6.252	-1,0
23	Berlin Tegel	6.036	0,8
24	Geneva	5.486	3,8
25	Lisbon	5.377	-2,8

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

Source: OAG 2010/11, DLR 2010/11

Rank	Airline	12/2011	Growth rate
1	Delta Air Lines	154.594	-9,5
2	American Airlines	103.956	-3,7
3	US Airways	95.923	-0,2
4	United Airlines	94.419	-6,1
5	Southwest Airlines	94.143	0,0
6	Continental Airlines	75.688	-0,9
7	Lufthansa German Airlines	52.726	0,6
8	China Southern Airlines	49.498	7,4
9	Air Canada	44.960	-0,4
10	Air France	43.616	2,4
11	China Eastern Airlines	41.581	4,1
12	All Nippon Airways	33.739	4,2
13	Ryanair	31.983	-3,1
14	Air China	30.907	0,2
15	easyJet	30.337	1,6
16	Gol Transportes Aereos	28.637	8,2
17	TAM Linhas Aereas	26.667	-5,2
18	British Airways	24.435	0,1
19	Alaska Airlines	23.779	2,8
20	Turkish Airlines	22.705	12,1
21	JetBlue Airways Corporation	22.133	7,8
22	Qantas Airways	21.900	1,8
23	AirTran Airways	21.109	-4,9
24	Japan Airlines International	21.095	-1,2
25	Iberia	20.521	-9,1

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

Rank	Airline	12/2011	Growth rate
1	Lufthansa German Airlines	32.318	3,2
2	Air Berlin	9.221	-8,8
3	germanwings	3.290	-3,8
4	Air France	1.668	6,4
5	Ryanair	1.664	-36,4
6	easyJet	1.662	-1,1
7	KLM-Royal Dutch Airlines	1.231	4,9
8	Swiss	1.111	-0,1
9	British Airways	991	-8,5
10	Condor Flugdienst	836	6,8
11	SAS Scandinavian Airlines	808	-2,4
12	Austrian Airlines AG	776	-32,8
13	Turkish Airlines	721	15,4
14	LOT - Polish Airlines	650	-2,7
15	Aeroflot Russian Airlines	581	53,7
16	TUIfly	534	-7,5
17	SunExpress	520	-26,8
18	Cirrus Airlines	516	-14,7
19	Luxair	447	-22,4
20	Intersky	426	-14,1
21	NIKI	395	161,6
22	Emirates	343	31,9
23	Czech Airlines	338	3,4
24	Iberia	321	-23,9
25	Finnair	320	6,0

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

Rank	Airline	12/2011	Growth rate
1	Lufthansa German Airlines	48.876	0,9
2	Air France	39.917	2,4
3	Ryanair	31.552	-2,6
4	easyJet	29.723	1,6
5	Turkish Airlines	20.109	10,3
6	Iberia	19.193	-9,8
7	British Airways	19.157	-1,3
8	SAS Scandinavian Airlines	17.772	2,9
9	KLM-Royal Dutch Airlines	15.199	6,6
10	Alitalia	13.867	-1,0
11	Flybe	13.643	5,9
12	Air Berlin	12.639	-19,5
13	Swiss	11.797	0,8
14	Aeroflot Russian Airlines	9.861	37,5
15	Norwegian Air Shuttle	9.560	18,4
16	Austrian Airlines AG	9.252	-11,5
17	Wideroe's Flyveselskap	9.196	6,6
18	TAP Air Portugal	8.215	0,0
19	Pegasus Airlines	6.453	7,2
20	Aer Lingus	6.407	7,7
21	Finnair	6.389	-8,8
22	Vueling Airlines	6.220	-0,0
23	LOT - Polish Airlines	6.119	53,4
24	Wizz Air	5.544	17,3
25	Brussels Airlines	5.424	-12,2

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

Source: OAG 2010/11, DLR 2010/11

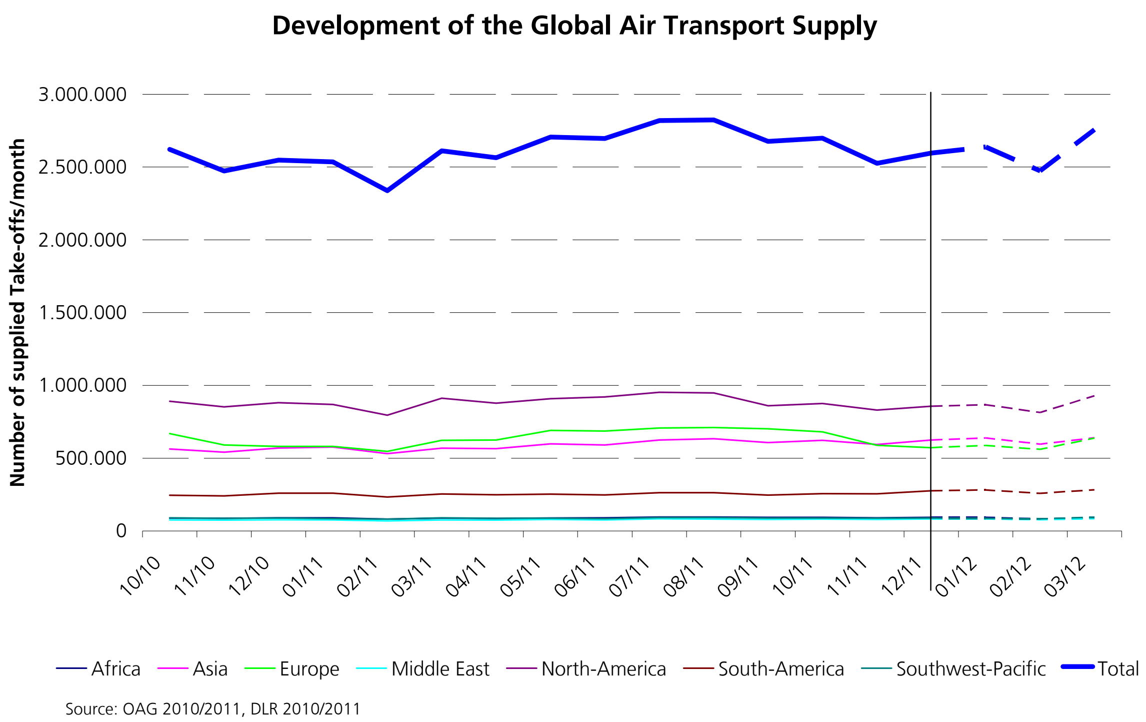

Fig. 1: Development of the Global Air Transport Supply

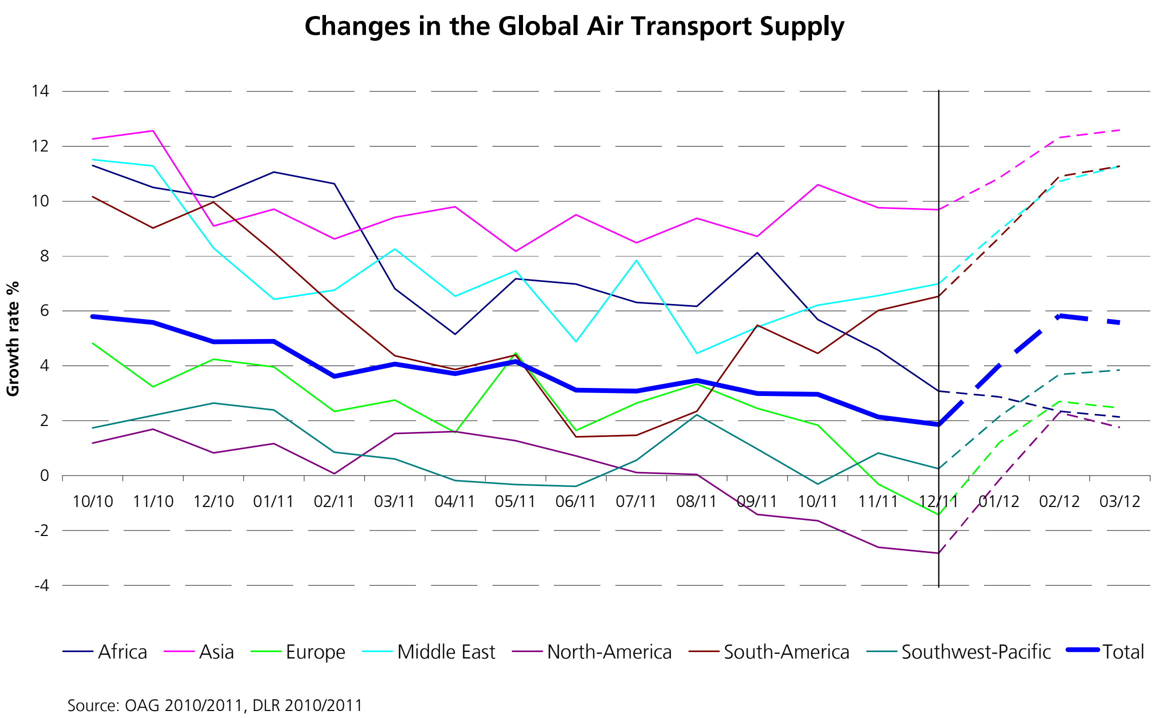

Fig. 2: Changes in the Global Air Transport Supply

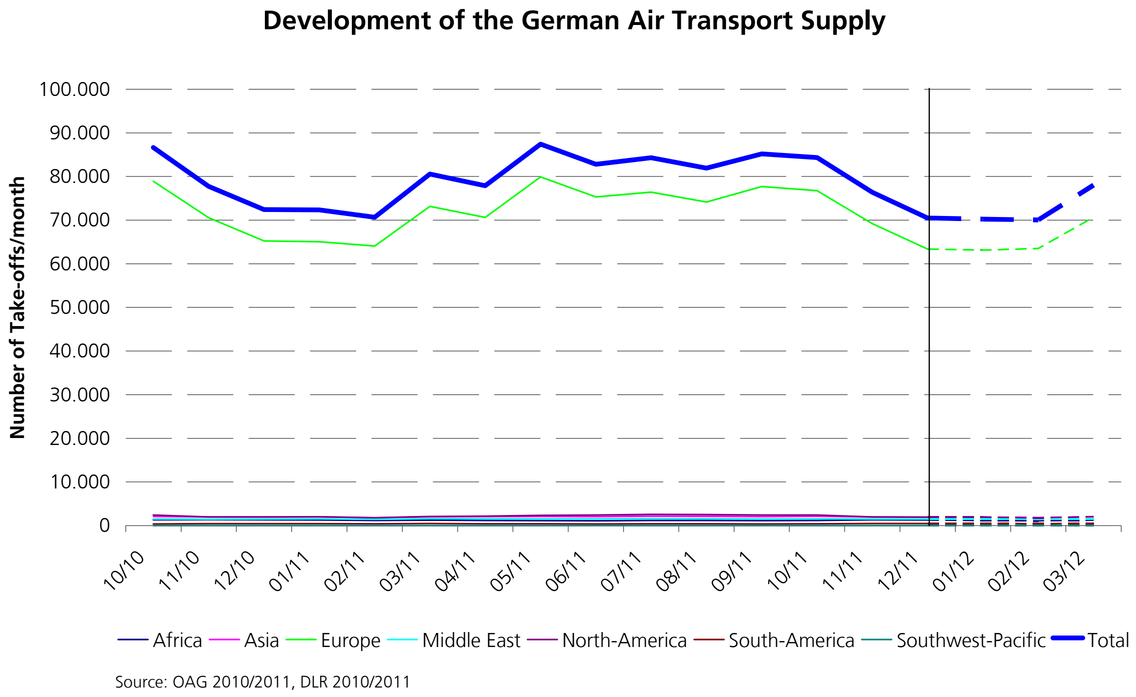

Fig. 3: Development of the German Air Transport Supply

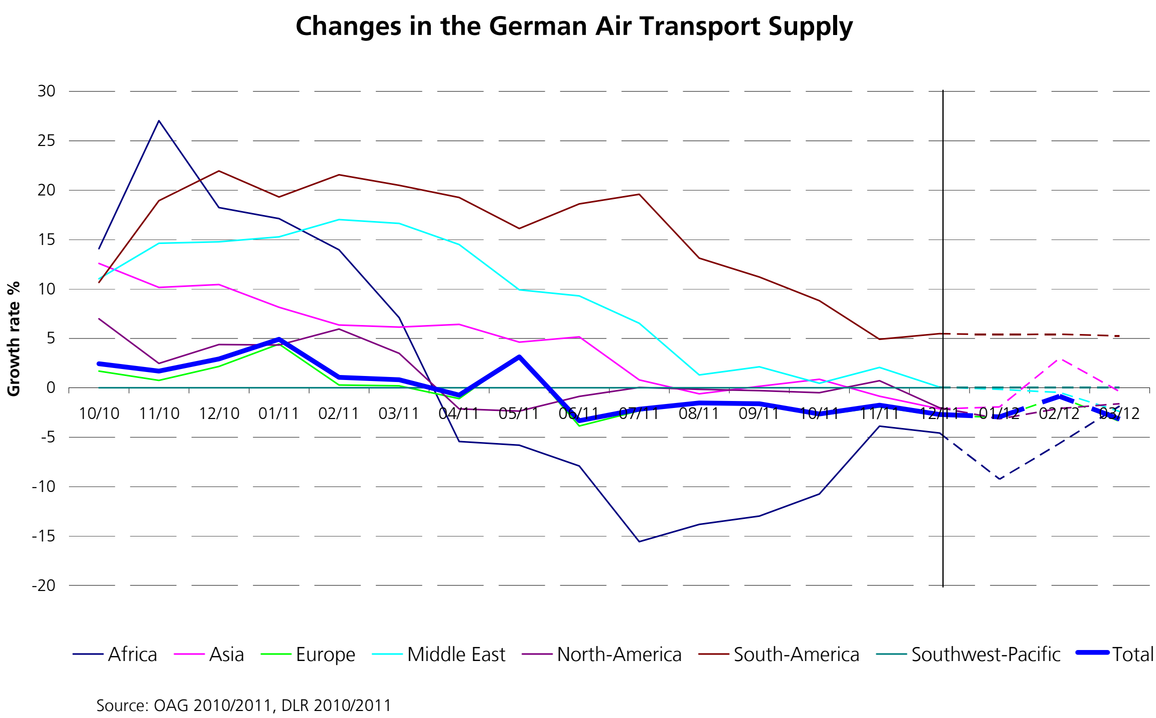

Fig. 4: Changes in the German Air Transport Supply

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