

Global Aviation Monitor (GAM)

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

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

Analysis: April 2009 – March 2010

Global

- March 2010: 2.51 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 March 2010 compared to 2009
- Airports: Still decline of traffic volume at many airports worldwide; however, more and more large US airports show a slow rise; strong growth at Beijing airport
- Airlines: 6 out of the 10 biggest airlines are from USA, mostly now with increasing no. of flights offered; strong growth by Delta Airlines because merger with former Northwest

World Regions, Europe

- Increase of traffic worldwide since December 2009; small increase in Europe, small decrease in North America, already strong growth in Asia
- Airports: Still decline of air transport supply at some European airports; however, strong increase at e.g. Athens and Moscow
- Airlines: Small decline of flights of legacy carriers, except e.g. Air China and China Eastern Airlines, some 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. DUS 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: April 2010 – June 2010

Global

- For the next months, a traffic increase of up to 2-3% is expected

World Regions, Europe

- Stagnation/Small increase in Europe is expected

Germany

- Small increase is expected for the next months

Rank	Airport	03/2010	Growth rate
1	Atlanta Hartsfield-Jackson Intl	40.198	-2,7
2	Chicago O'Hare International	35.794	1,5
3	Dallas/Fort Worth Intl	26.930	3,3
4	Denver Intl	26.075	1,4
5	Los Angeles International	22.717	3,5
6	Houston George Bush Intercontinental	21.547	-6,2
7	Beijing Capital	20.953	6,6
8	Charlotte	19.829	-2,4
9	Paris Charles de Gaulle	19.656	-7,1
10	London Heathrow	19.573	-2,5
11	Frankfurt International	19.394	2,8
12	Detroit Wayne County	18.502	0,6
13	Madrid Barajas	18.150	-0,3
14	Philadelphia International	17.844	-3,9
15	Phoenix Sky Harbor Intl .	17.074	-3,0
16	Minneapolis International	16.831	-6,7
17	Newark Liberty International	16.799	-5,4
18	New York J F Kennedy International	16.550	-7,3
19	New York La Guardia	15.783	1,5
20	Toronto Lester B Pearson Intl	15.734	2,0
21	Munich International	15.610	-4,7
22	Amsterdam	15.466	-1,6
23	San Francisco International	14.910	3,3
24	Tokyo Haneda	14.119	-2,2
25	Boston Logan International	13.959	2,3

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

Rank	Airport	03/2010	Growth rate
1	Frankfurt International	19.394	2,8
2	Munich International	15.610	-4,7
3	Dusseldorf International	8.585	3,4
4	Berlin Tegel	6.356	2,6
5	Hamburg	6.085	7,6
6	Stuttgart	4.302	-5,4
7	Cologne/Bonn K.A.	3.881	7,8
8	Berlin Schoenefeld	2.373	11,5
9	Nuremberg	2.104	6,8
10	Hanover	2.083	-11,6
11	Bremen	1.259	3,9
12	Frankfurt Hahn	1.103	-10,8
13	Dresden	1.031	1,0
14	Leipzig/Halle	943	6,7
15	Dusseldorf Niederrhein	737	14,8
16	Munster	648	-15,1
17	Dortmund	540	6,3
18	Friedrichshafen	451	-15,9
19	Saarbrücken/Ensheim	425	-9,8
20	Karlsruhe/Baden Baden	402	16,9
21	Memmingen	325	99,4
22	Paderborn	290	-18,1
23	Hamburg Luebeck	185	4,5
24	Mannheim	150	-4,5
25	Erfurt	138	48,4

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

Rank	Airport	03/2010	Growth rate
1	Paris Charles de Gaulle	19.656	-7,1
2	London Heathrow	19.573	-2,5
3	Frankfurt International	19.394	2,8
4	Madrid Barajas	18.150	-0,3
5	Munich International	15.610	-4,7
6	Amsterdam	15.466	-1,6
7	Rome Fiumicino	13.218	1,7
8	Barcelona	10.501	-7,1
9	Istanbul Ataturk	10.347	7,1
10	Copenhagen	10.173	7,5
11	Vienna	10.128	2,9
12	Paris Orly	9.560	0,6
13	Zürich	9.486	4,6
14	London Gatwick	9.069	7,1
15	Dusseldorf International	8.585	3,4
16	Brussels	8.448	-3,9
17	Oslo	8.348	-3,2
18	Stockholm Arlanda	7.747	-5,6
19	Athens Intl Eleftherios Venizelos	7.529	11,7
20	Milan Malpensa	7.407	-0,7
21	Helsinki	7.002	-5,7
22	Moscow Domodedovo	6.673	18,6
23	Moscow Sheremetyevo International	6.362	6,5
24	Berlin Tegel	6.356	2,6
25	Hamburg	6.085	7,6

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

Source: OAG 2009/10, DLR 2009/10

Rank	Airline	03/2010	Growth rate
1	Delta Air Lines	177.636	57,5
2	American Airlines	109.105	0,6
3	United Airlines	104.099	3,0
4	US Airways	96.777	-4,1
5	Southwest Airlines	95.409	-4,0
6	Continental Airlines	76.658	-6,4
7	Lufthansa German Airlines	57.496	-1,9
8	Air France	46.280	-5,4
9	Air Canada	45.178	0,7
10	China Southern Airlines	44.701	15,1
11	China Eastern Airlines	36.797	16,2
12	Ryanair	34.926	6,4
13	Air China	29.670	8,2
14	easyJet	29.374	23,3
15	All Nippon Airways	28.871	-6,4
16	TAM Linhas Aereas	27.890	-2,3
17	Gol Transportes Aereos	25.090	7,5
18	British Airways	24.854	-6,3
19	Iberia	24.571	-13,0
20	Alaska Airlines	24.222	-4,1
21	Japan Airlines International	22.825	-3,8
22	AirTran Airways	22.680	5,9
23	SAS Scandinavian Airlines	22.602	-9,6
24	Qantas Airways	21.654	-2,1
25	JetBlue Airways Corporation	20.125	5,1

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

Rank	Airline	03/2010	Growth rate
1	Lufthansa German Airlines	34.996	-2,3
2	Air Berlin	12.291	28,1
3	germanwings	3.526	8,5
4	Ryanair	2.944	3,7
5	Air France	1.728	-14,3
6	easyJet	1.584	38,5
7	KLM-Royal Dutch Airlines	1.265	-4,6
8	Austrian Airlines AG	1.187	1,2
9	SAS Scandinavian Airlines	1.139	-4,8
10	British Airways	1.123	1,8
11	Swiss	1.104	8,8
12	Cirrus Airlines	851	-8,8
13	TUIfly	843	-66,6
14	Condor Flugdienst	800	0,0
15	Turkish Airlines	750	14,0
16	LOT - Polish Airlines	727	0,6
17	Luxair	686	11,2
18	Flybe	626	12,6
19	Intersky	532	-8,7
20	Aeroflot Russian Airlines	494	4,7
21	SunExpress	482	84,0
22	Czech Airlines	457	-2,6
23	Iberia	425	-3,0
24	Aegean Airlines	329	21,4
25	Brussels Airlines	308	-7,8

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

Rank	Airline	03/2010	Growth rate
1	Lufthansa German Airlines	53.655	-2,1
2	Air France	42.610	-5,6
3	Ryanair	34.505	5,9
4	easyJet	28.851	22,8
5	Iberia	23.401	-13,8
6	SAS Scandinavian Airlines	22.386	-9,6
7	British Airways	19.970	-8,1
8	Air Berlin	18.928	25,1
9	Turkish Airlines	17.450	16,6
10	KLM-Royal Dutch Airlines	15.043	-3,9
11	Flybe	13.998	4,9
12	Alitalia	12.422	9,0
13	Swiss	11.667	9,7
14	Austrian Airlines AG	11.589	2,6
15	Norwegian Air Shuttle	8.864	22,5
16	Wideroe's Flyveselskap	8.654	-4,1
17	TAP Air Portugal	7.517	-6,1
18	Finnair	7.048	-9,4
19	Aeroflot Russian Airlines	6.810	7,4
20	LOT - Polish Airlines	6.569	2,2
21	Brussels Airlines	6.476	7,6
22	Vueling Airlines	6.384	95,8
23	Olympic Airlines	6.022	-8,9
24	Czech Airlines	5.884	-8,1
25	Aer Lingus	5.690	-1,6

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

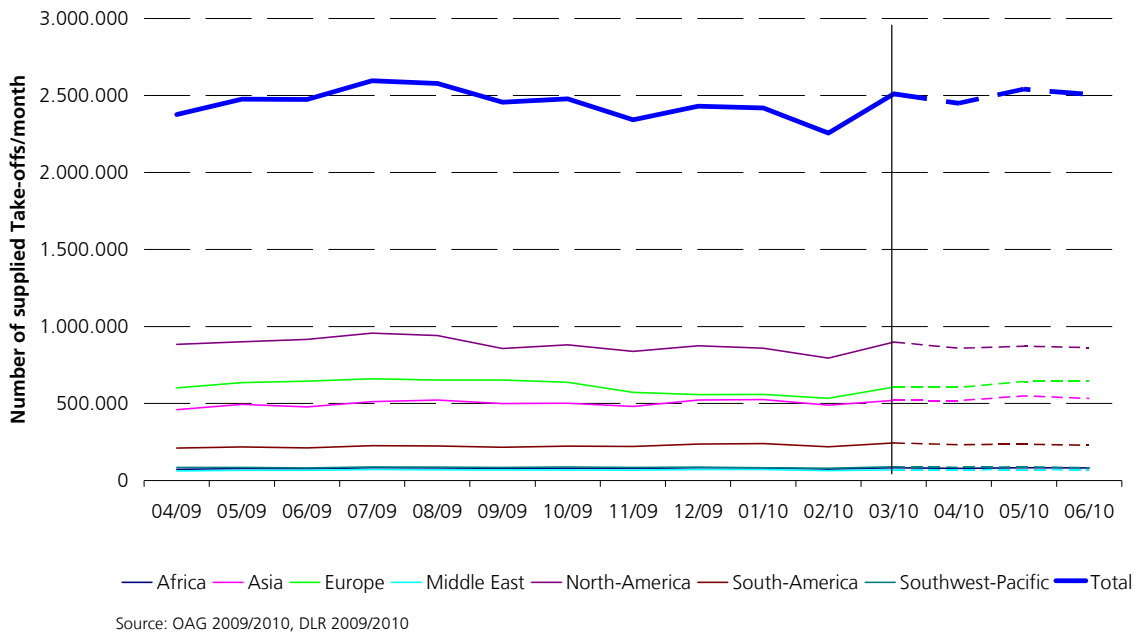


Fig. 1: Development of the Global Air Transport Supply

Changes in the Global Air Transport Supply

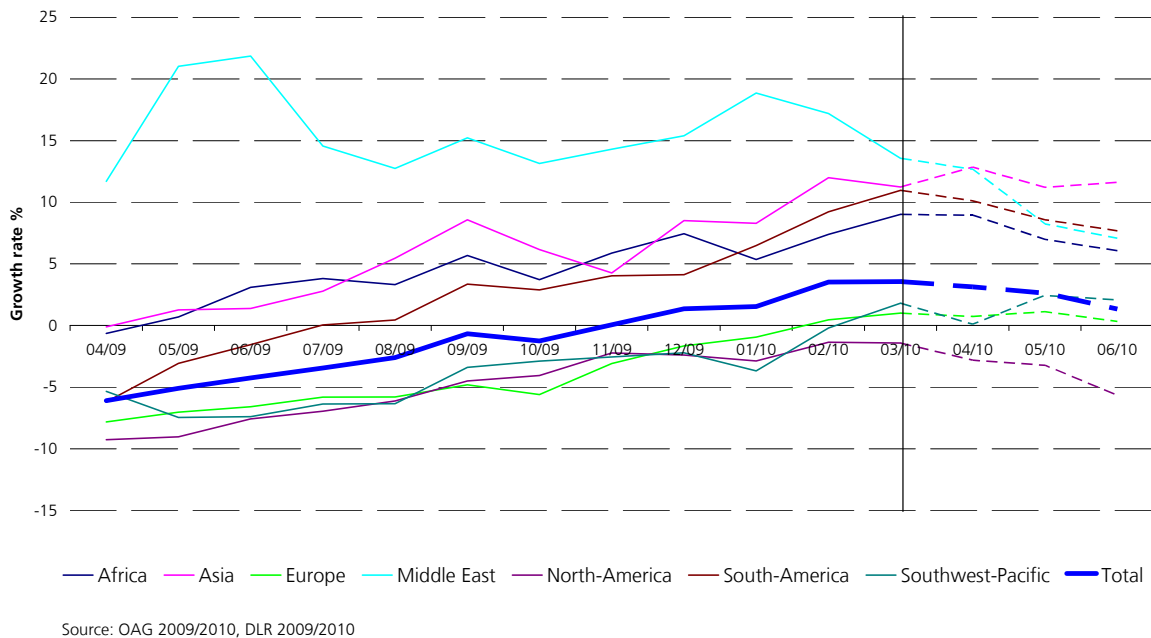


Fig. 2: Changes in the Global Air Transport Supply

Development of the German Air Transport Supply

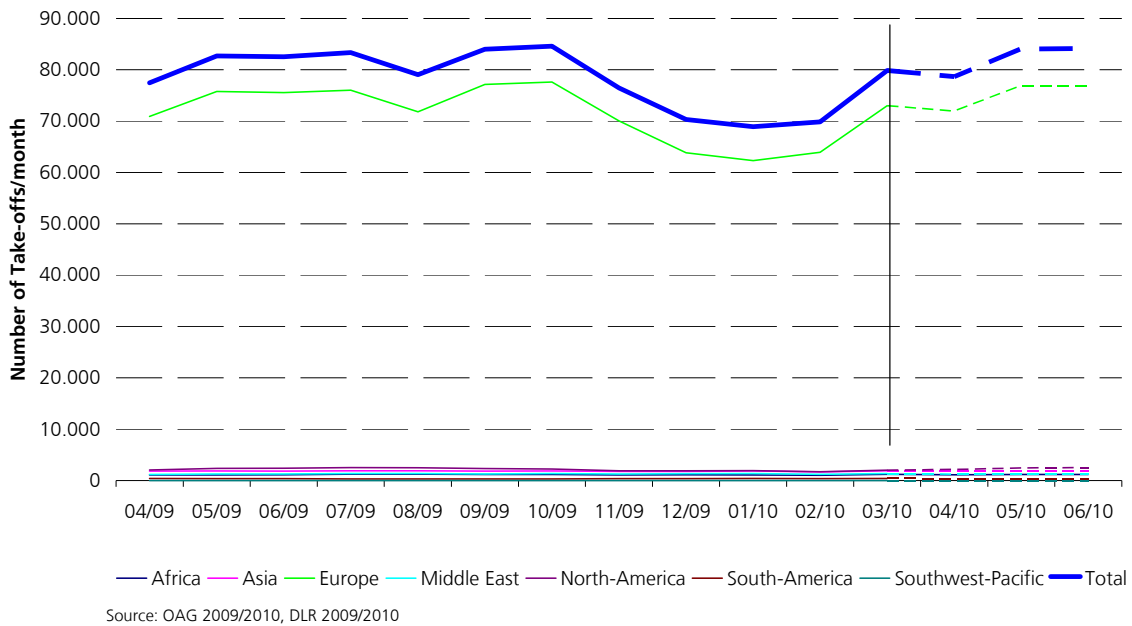


Fig. 3: Development of the German Air Transport Supply

Changes in the German Air Transport Supply

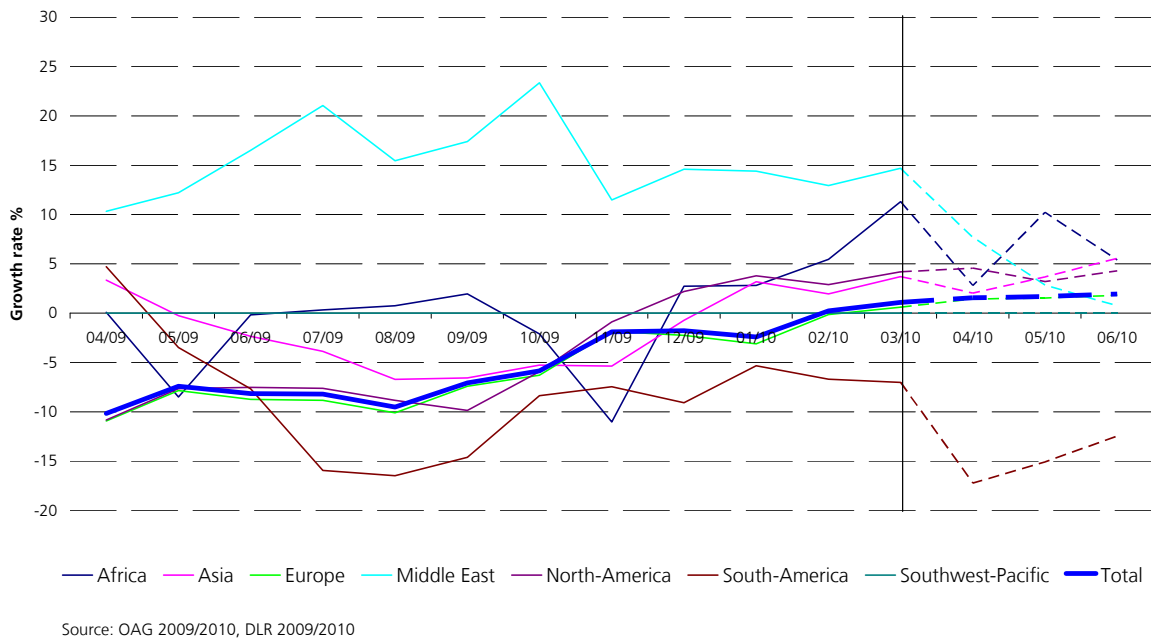


Fig. 4: Changes in the German Air Transport Supply

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