Flughafenwesen und Luftverkehr

Global Aviation Monitor (GAM)

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

September 2011

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: October 2010 – September 2011

Global

- September 2011: 2.68 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 3.0% in September 2011 compared to 2010.
- Airports: Traffic growth at most airports worldwide; but most large US airports show 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 All Nippon Airways

World Regions, Europe

- Increase of traffic worldwide since December 2009; stagnation 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; very strong increase at Istanbul, Moscow and Manchester, however decline at e.g. Athen airport
- Airlines: Increase of flights of some legacy carriers, except e.g. Finnair 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 the biggest airports Frankfurt, Munich, Dusseldorf 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: October 2011 – December 2011

Global

- For the next months, a small increase of the traffic of around 3-4% growth is expected

World Regions, Europe

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

Germany

- For the next month, a small decrease of the traffic of around 2-3% growth is expected

Rank	Airport	09/2011	Growth rate
1	Atlanta Hartsfield-Jackson Intl	36.731	-3,5
2	Chicago O'Hare International	36.278	-1,7
3	Dallas/Fort Worth Intl	25.818	-0,7
4	Denver Intl	24.652	-3,1
5	Los Angeles International	23.452	6,7
6	Beijing Capital	22.775	2,0
7	Frankfurt International	20.566	2,4
8	Paris Charles de Gaulle	20.283	1,5
9	London Heathrow	20.282	0,7
10	Houston George Bush Intercontinental	19.777	0,3
11	Charlotte	19.236	-6,8
12	Madrid Barajas	18.262	-1,8
13	Amsterdam	17.958	7,6
14	Detroit Wayne County	17.682	-4,1
15	Philadelphia International	17.306	-1,4
16	Munich International	16.955	0,8
17	New York J F Kennedy International	16.684	2,5
18	Toronto Lester B Pearson Intl	16.435	2,1
19	Tokyo Haneda	16.129	13,9
20	Minneapolis International	16.098	-3,0
21	San Francisco International	16.082	6,6
22	Phoenix Sky Harbor Intl .	15.874	2,1
23	Newark Liberty International	15.627	3,5
24	New York La Guardia	15.601	0,5
25	Shanghai Pudong International	15.308	8,2

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

Rank	Airport	09/2011	Growth rate
1	Frankfurt International	20.566	2,4
2	Munich International	16.955	0,8
3	Dusseldorf International	9.459	0,4
4	Berlin Tegel	7.092	4,5
5	Hamburg	6.264	-1,8
6	Stuttgart	4.787	-1,5
7	Cologne/Bonn K.A.	4.326	-4,3
8	Berlin Schoenefeld	2.505	-3,6
9	Hanover	2.485	-0,1
10	Nuremberg	1.892	-2,2
11	Bremen	1.143	-17,2
12	Frankfurt Hahn	1.087	-20,1
13	Dresden	1.033	-7,4
14	Leipzig/Halle	859	-24,3
15	Munster	719	-2,0
16	Dusseldorf Niederrhein	713	-24,6
17	Dortmund	591	5,2
18	Friedrichshafen	511	-21,3
19	Karlsruhe/Baden Baden	394	-12,1
20	Paderborn	375	2,5
21	Saarbrucken Ensheim	342	-27,1
22	Memmingen	231	-29,8
23	Westerland	205	-10,9
24	Hamburg Luebeck	111	-40,3
25	Erfurt	107	-7,8

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

Rank	Airport	09/2011	Growth rate
1	Frankfurt International	20.566	2,4
2	Paris Charles de Gaulle	20.283	1,5
3	London Heathrow	20.282	0,7
4	Madrid Barajas	18.262	-1,8
5	Amsterdam	17.958	7,6
6	Munich International	16.955	0,8
7	Rome Fiumicino	14.781	3,0
8	Istanbul Ataturk	13.298	21,1
9	Barcelona	12.819	4,4
10	London Gatwick	11.302	5,3
11	Vienna	10.792	1,6
12	Copenhagen	10.661	0,2
13	Zurich	10.434	3,8
14	Paris Orly	10.164	1,3
15	Moscow Domodedovo	10.037	27,1
16	Dusseldorf International	9.459	0,4
17	Oslo	9.397	2,1
18	Stockholm Arlanda	9.054	6,8
19	Brussels	9.013	1,5
20	Moscow Sheremetyevo International	8.808	21,2
21	Palma Mallorca	8.395	5,7
22	Helsinki	7.842	3,3
23	Milan Malpensa	7.797	-1,3
24	Manchester International	7.391	10,7
25	Athens Intl Eleftherios Venizelos	7.115	-8,3

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

Source: OAG 2010/11, DLR 2010/11

Rank	Airline	09/2011	Growth rate
1	Delta Air Lines	162.921	-5,0
2	American Airlines	103.137	-0,3
3	United Airlines	94.513	-5,1
4	Southwest Airlines	93.019	1,6
5	US Airways	92.235	-2,7
6	Continental Airlines	69.161	1,4
7	Lufthansa German Airlines	60.630	2,7
8	China Southern Airlines	49.899	-0,6
9	Air Canada	47.464	1,7
10	Air France	46.261	1,4
11	Ryanair	45.175	3,5
12	China Eastern Airlines	42.842	6,8
13	easyJet	36.405	5,0
14	All Nippon Airways	32.951	9,4
15	Air China	32.300	-0,0
16	Gol Transportes Aereos	26.752	7,3
17	British Airways	26.522	1,4
18	TAM Linhas Aereas	25.847	-8,5
19	SAS Scandinavian Airlines	24.002	1,1
20	Turkish Airlines	23.479	8,3
21	Alaska Airlines	23.148	0,2
22	Iberia	23.102	-8,5
23	Qantas Airways	22.124	1,8
24	Japan Airlines International	20.097	-7,6
25	AirTran Airways	19.821	-2,3

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

Rank	Airline	09/2011	Growth rate
1	Lufthansa German Airlines	36.636	2,9
2	Air Berlin	12.605	-7,4
3	germanwings	4.117	-7,6
4	Ryanair	2.554	-28,0
5	easyJet	1.767	6,7
6	Air France	1.733	4,1
7	Condor Flugdienst	1.673	5,6
8	TUIfly	1.545	11,1
9	KLM-Royal Dutch Airlines	1.332	4,9
10	SAS Scandinavian Airlines	1.158	2,9
11	Swiss	1.120	2,0
12	British Airways	1.115	-8,1
13	Austrian Airlines AG	999	-20,5
14	Turkish Airlines	916	12,4
15	NIKI	842	472,8
16	Cirrus Airlines	773	-14,4
17	LOT - Polish Airlines	694	4,4
18	SunExpress	633	10,5
19	Luxair	598	-8,7
20	Intersky	537	-26,9
21	Aeroflot Russian Airlines	504	0,8
22	Flybe	423	-33,8
23	Iberia	395	-7,7
24	Pegasus Airlines	372	-15,6
25	Brussels Airlines	366	4,0

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

Rank	Airline	09/2011	Growth rate
1	Lufthansa German Airlines	56.332	2,6
2	Ryanair	44.612	3,4
3	Air France	42.643	1,6
4	easyJet	35.812	4,7
5	SAS Scandinavian Airlines	23.739	1,0
6	Iberia	21.623	-9,6
7	British Airways	21.171	-0,3
8	Turkish Airlines	20.997	6,6
9	Air Berlin	19.069	-14,8
10	Alitalia	16.899	7,2
11	KLM-Royal Dutch Airlines	16.599	8,6
12	Flybe	15.050	-0,7
13	Swiss	11.868	3,7
14	Austrian Airlines AG	11.446	-5,9
15	Norwegian Air Shuttle	11.347	9,1
16	Wideroe's Flyveselskap	10.119	9,4
17	Aeroflot Russian Airlines	9.691	26,3
18	Vueling Airlines	9.020	13,6
19	TAP Air Portugal	8.718	3,2
20	Finnair	8.336	11,8
21	Aer Lingus	7.662	4,5
22	LOT - Polish Airlines	7.005	4,7
23	Brussels Airlines	7.001	75,6
24	Pegasus Airlines	6.903	16,9
25	germanwings	6.430	-6,2

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

Source: OAG 2010/11, DLR 2010/11

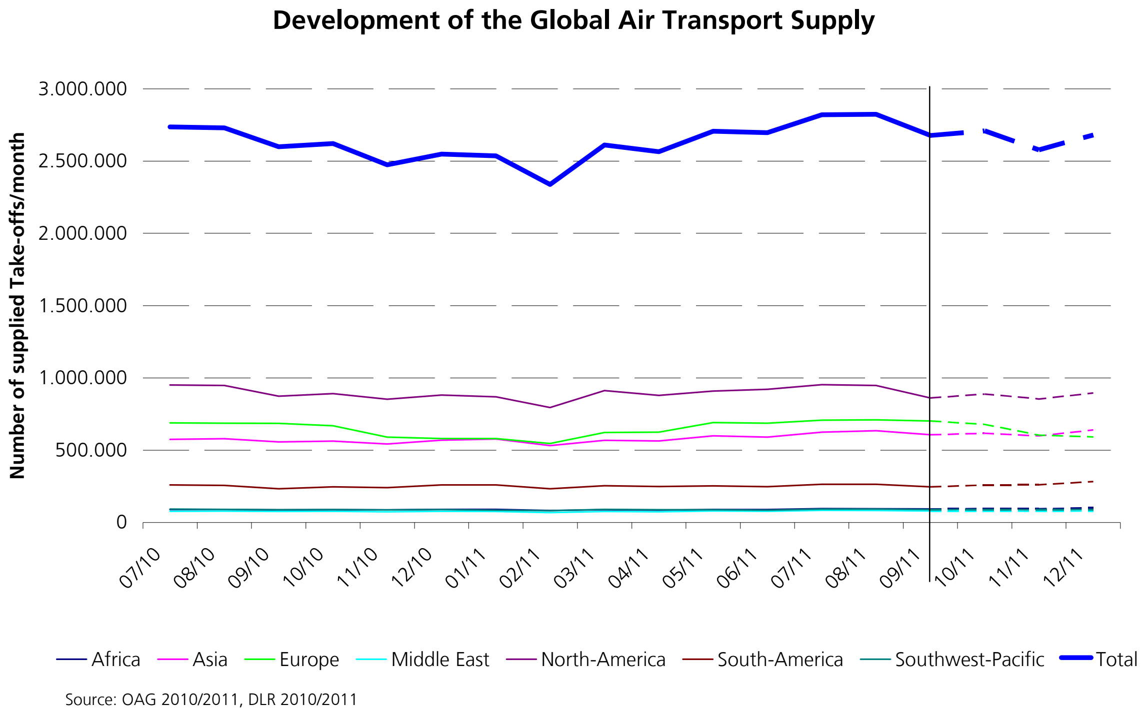

Fig. 1: Development of the Global Air Transport Supply

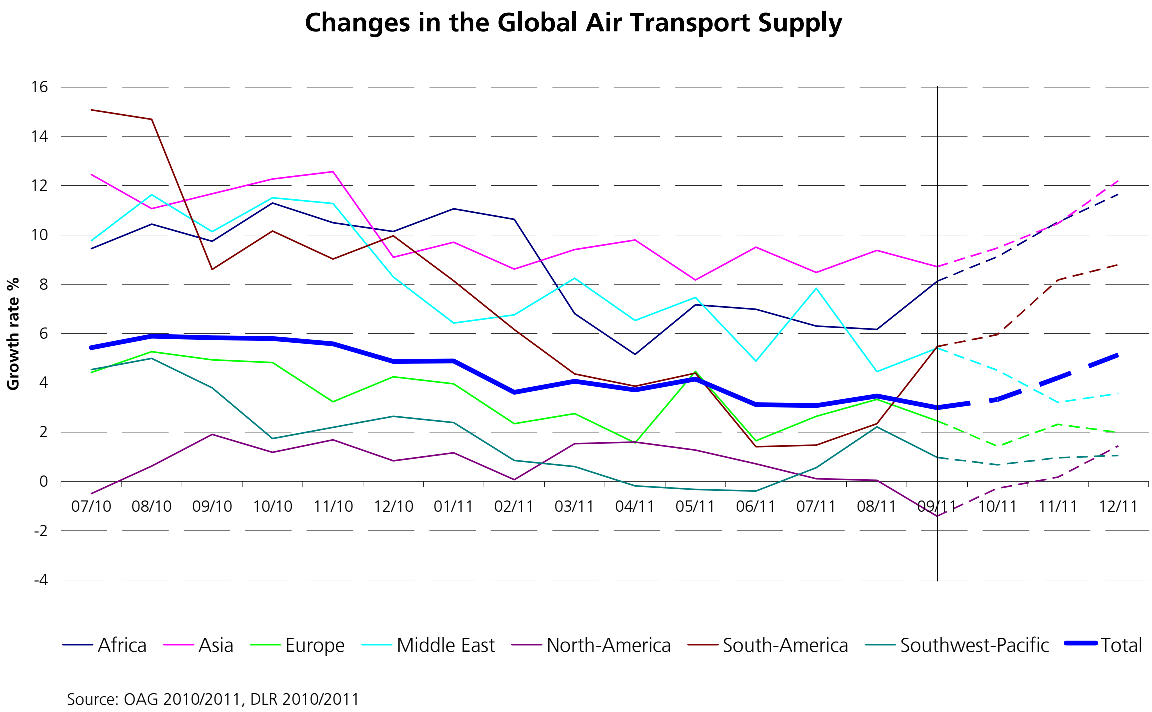

Fig. 2: Changes in the Global Air Transport Supply

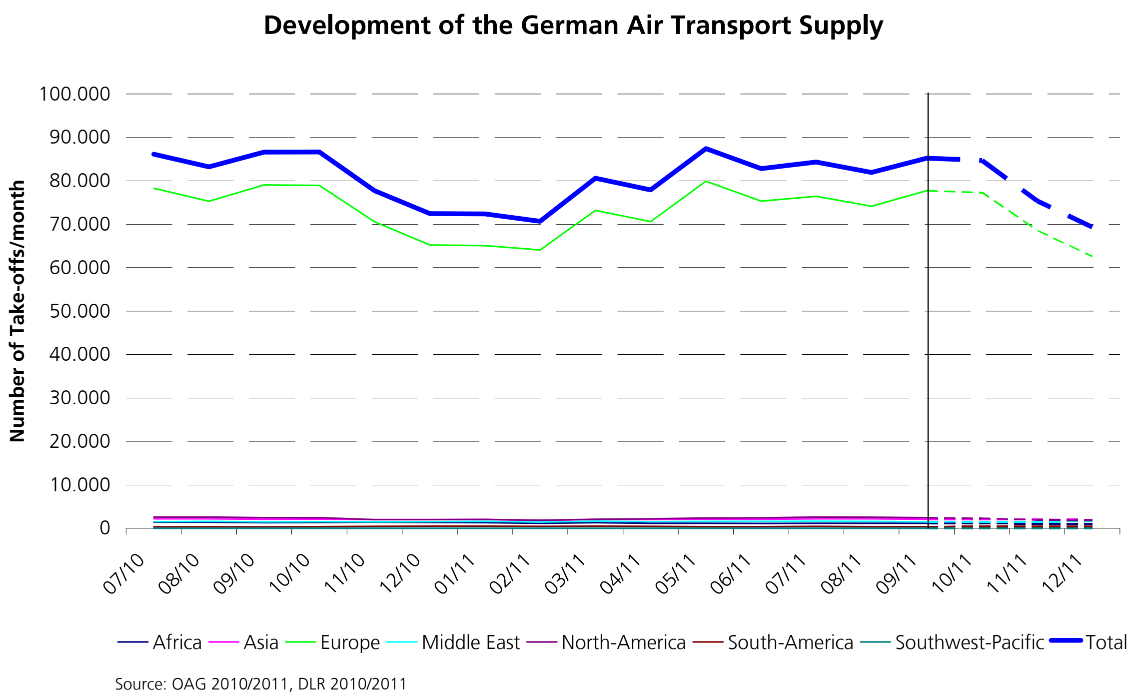

Fig. 3: Development of the German Air Transport Supply

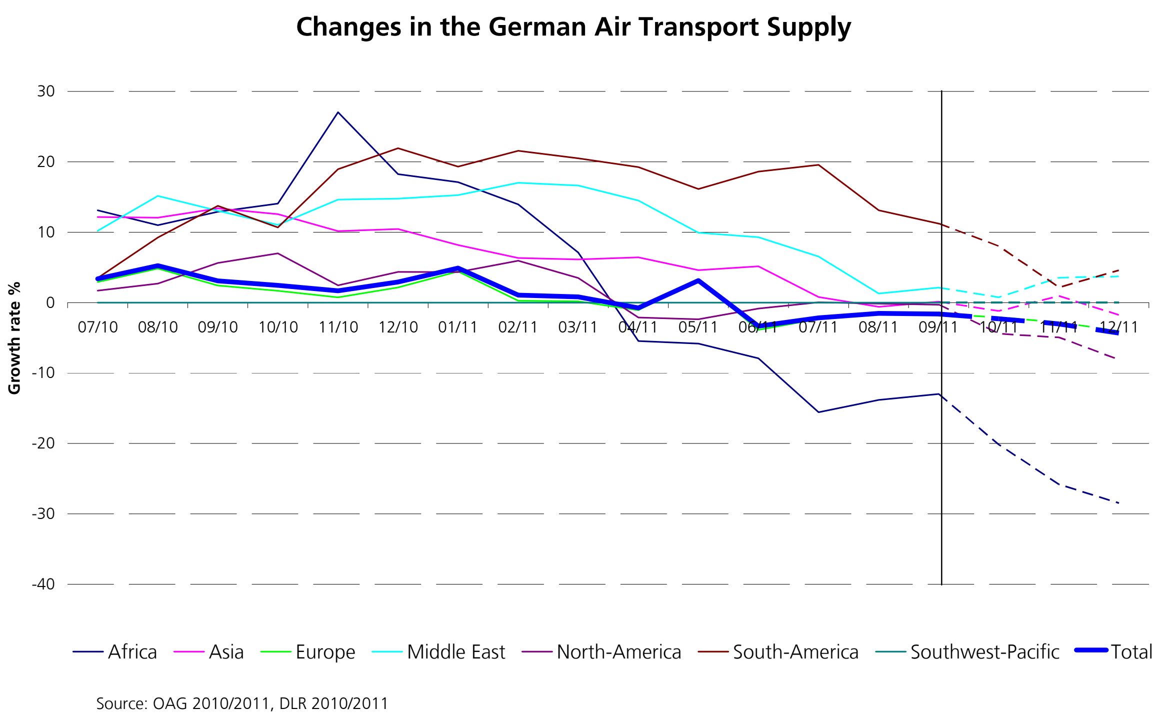

Fig. 4: Changes in the German Air Transport Supply

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