

Global Aviation Monitor (GAM)

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

December 2014



Main Results of Global Air Transport Supply Analysis and Outlook

Background:

- Covers about 3,500 airports worldwide
- Covers about 850 airlines worldwide
- Air transport supply of 2014: More than 33 M flights (non-stop) worldwide, new record value
- Busiest month 2014: July with 2.96 M flights
- Air traffic increases slowly since April 2013
- Forecasting methodology: Time series analysis

Analysis: January 2014 – December 2014

Global

- December 2014: 2.71 M flights supplied (+2.5%)
- About 5% growth per year before financial crisis 2008/2009, then a rapid decline of more than 9% between February 2008 and February 2009, followed by a rather slow recovery until 2011 (7.2% increase between February 2009 and February 2011). Since 2011, the number of flights grows only very slowly; stagnation between September 2012 and March 2013, small growth rates since April 2013
- Airports: Heterogeneous development of no. of flights offered; strong growth at Shanghai Pudong (+16.1%)
- Airlines: Heterogeneous development of no. of flights offered; strong growth of AVIANCA

World Regions, Europe

- Overall small increase since April 2013; in Europe, small traffic increase since July 2013; in Asia continued growth; no growth in North America
- Airports: Heterogeneous developments of no. of flights offered; strong increase at Istanbul Sabiha Gokcen and Brussels however decline at some airports, e.g. Vienna and Oslo
- Airlines: Heterogeneous developments of flights, some airlines, e.g. Aeroflot with strong growth, some growth in the low cost segment, e.g. Wizz, germanwings and Vueling (former Lufthansa flights in Germany and Europe are now operated by germanwings except at Frankfurt and Munich), some airlines, e.g. Air France with decrease; startup of HOP! from several former regional carriers of Air France

Germany

- Airports: Some airports, e.g. Berlin Schoenefeld, with traffic growth; some German airports with downward trend, e.g. Niederrhein
- Airlines: Heterogeneous developments of number of flights offered; strong growth of germanwings, and Ethiad Regional (operated by Darwin Airline); some airlines, e.g. Swiss and Air France, with decreasing traffic

Outlook: January 2015 – March 2015

Global

- For the next few months, a small traffic growth of 1-3% is expected

World Regions, Europe

- For the next few months, a small traffic growth of 1-2% is expected

Germany

- For the next few months, a small traffic growth of 1-3% is expected

Rank	Airport	12/2014	Growth rate
1	Chicago O'Hare International	35.337	1,5
2	Atlanta Hartsfield-Jackson Intl	34.530	-3,9
3	Dallas/Fort Worth Intl	28.657	3,1
4	Los Angeles International	25.272	1,6
5	Beijing Capital	25.038	2,8
6	Denver Intl	22.422	-5,1
7	Charlotte	21.555	-1,4
8	Houston George Bush Intercontinental	20.502	2,1
9	London Heathrow	18.694	0,3
10	Shanghai Pudong International	18.313	16,1
11	Tokyo Haneda	18.187	7,2
12	New York J F Kennedy International	17.395	5,6
13	Istanbul Ataturk	17.380	7,5
14	Paris Charles de Gaulle	17.348	1,1
15	Jakarta Soekarno-Hatta	17.337	0,0
16	Guangzhou	17.259	3,6
17	San Francisco International	16.837	1,5
18	Toronto Lester B Pearson Intl	16.503	3,6
19	Frankfurt International	16.501	-2,4
20	Mexico City Juarez International	16.437	5,8
21	Newark Liberty International	16.301	-0,3
22	Amsterdam	16.258	3,0
23	Hong Kong International	16.256	2,1
24	Phoenix Sky Harbor Intl .	16.208	0,2
25	Dubai	16.020	4,4

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

Rank	Airport	12/2014	Growth rate
1	Frankfurt International	16.501	-2,4
2	Munich International	13.117	0,7
3	Dusseldorf International	6.967	6,8
4	Berlin Tegel	6.537	3,7
5	Hamburg	5.067	9,9
6	Stuttgart	3.192	6,2
7	Cologne/Bonn K.A.	2.885	5,7
8	Berlin Schoenefeld	2.040	10,6
9	Hanover	1.633	-2,6
10	Nuremberg	1.285	-5,4
11	Bremen	914	1,0
12	Dresden	793	31,3
13	Leipzig/Halle	786	12,6
14	Frankfurt Hahn	621	11,7
15	Dortmund	500	4,0
16	Dusseldorf Niederrhein	354	-13,0
17	Munster	278	6,1
18	Friedrichshafen	240	3,0
19	Karlsruhe/Baden Baden	224	0,9
20	Saarbrücken Ensheim	222	10,4
21	Paderborn	164	-4,7
22	Memmingen	154	2,0
23	Mannheim	74	---
24	Rostock-Laage	42	20,0
25	Augsburg	36	12,5

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

Rank	Airport	12/2014	Growth rate
1	London Heathrow	18.694	0,3
2	Istanbul Ataturk	17.380	7,5
3	Paris Charles de Gaulle	17.348	1,1
4	Frankfurt International	16.501	-2,4
5	Amsterdam	16.258	3,0
6	Madrid Barajas	13.295	5,9
7	Munich International	13.117	0,7
8	Rome Fiumicino	11.388	3,9
9	Moscow Domodedovo	9.673	-1,3
10	Moscow Sheremetyevo International	9.567	1,9
11	Barcelona	9.117	-1,4
12	Paris Orly	9.072	0,2
13	London Gatwick	8.867	3,2
14	Zurich	8.775	2,8
15	Vienna	8.224	-4,4
16	Copenhagen	8.168	-2,8
17	Oslo	7.870	-3,6
18	Brussels	7.492	10,0
19	Stockholm Arlanda	7.427	0,2
20	Dusseldorf International	6.967	6,8
21	Istanbul Sabiha Gokcen	6.679	18,1
22	Berlin Tegel	6.537	3,7
23	Dublin	6.395	8,8
24	Lisbon	5.898	7,7
25	Geneva	5.772	4,6

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

Source: OAG 2013/14, DLR 2013/14

Rank	Airline	12/2014	Growth rate
1	Delta Air Lines	148.155	0,4
2	United Airlines	146.242	-7,9
3	American Airlines	108.082	-0,6
4	Southwest Airlines	102.326	7,8
5	US Airways	90.996	-1,1
6	China Southern Airlines	57.260	5,3
7	China Eastern Airlines	49.911	3,8
8	Air Canada	46.573	3,0
9	Lufthansa German Airlines	37.958	-13,1
10	Ryanair	36.751	13,1
11	Air China	34.770	3,3
12	Turkish Airlines	34.643	7,0
13	All Nippon Airways	34.212	-0,2
14	easyJet	32.424	2,6
15	Air France	29.384	-7,7
16	Gol Transportes Aereos	29.254	3,9
17	Alaska Airlines	27.634	7,3
18	Lion Air	27.274	5,3
19	British Airways	27.239	1,3
20	JetBlue Airways Corporation	26.855	5,3
21	Azul	24.412	-0,6
22	TAM Linhas Aereas	23.734	0,2
23	AVIANCA	23.122	65,4
24	Qantas Airways	23.061	0,6
25	Japan Airlines International	22.862	2,5

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

Rank	Airline	12/2014	Growth rate
1	Lufthansa German Airlines	22.976	-13,2
2	Air Berlin	8.566	3,6
3	germanwings	7.614	61,8
4	easyJet	1.959	16,5
5	Ryanair	1.698	5,1
6	KLM-Royal Dutch Airlines	1.208	-1,5
7	Turkish Airlines	1.181	11,7
8	British Airways	1.155	3,0
9	Air France	1.107	-15,4
10	Condor Flugdienst	950	18,9
11	Swiss	938	-3,9
12	SAS Scandinavian Airlines	880	5,3
13	Aeroflot Russian Airlines	733	38,8
14	Austrian Airlines AG	732	-0,3
15	TUIfly	470	-3,1
16	Air Dolomiti	452	32,2
17	Wizz Air	443	47,7
18	Luxair	439	4,5
19	Ethiad Regional	361	301,1
20	Iberia	350	31,1
21	Flybe	349	50,4
22	Norwegian Air Shuttle	344	23,7
23	SunExpress	344	5,5
24	United Airlines	340	-3,1
25	Emirates	329	-2,4

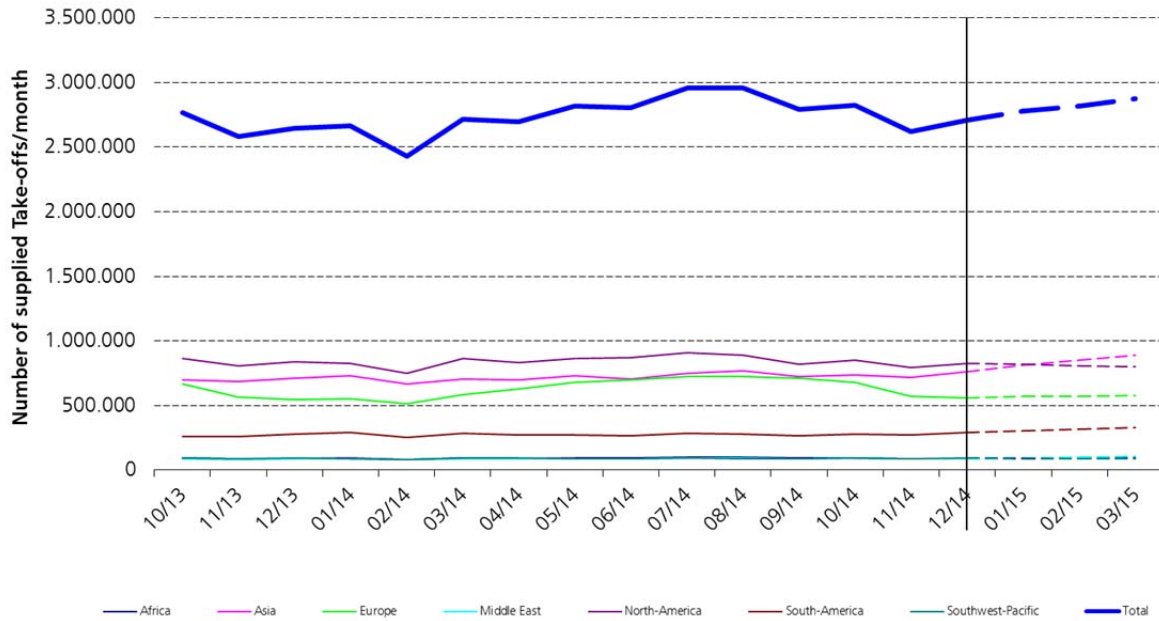
Tab. 6: Number of monthly Take-offs by the biggest Airlines in Germany from German airports

Rank	Airline	12/2014	Growth rate
1	Ryanair	36.110	13,4
2	Lufthansa German Airlines	34.703	-13,5
3	easyJet	31.786	2,8
4	Turkish Airlines	29.900	6,7
5	Air France	25.848	-9,1
6	British Airways	22.079	2,9
7	SAS Scandinavian Airlines	20.222	0,4
8	Aeroflot Russian Airlines	19.064	38,3
9	KLM-Royal Dutch Airlines	15.490	0,1
10	Flybe	13.378	10,4
11	Iberia	13.343	3,4
12	Alitalia	13.030	6,5
13	Air Berlin	12.725	2,0
14	Norwegian Air Shuttle	11.569	-4,7
15	germanwings	11.380	64,5
16	Wideroe's Flyveselskap	10.500	3,0
17	Swiss	10.474	-3,5
18	Vueling Airlines	10.442	21,5
19	Pegasus Airlines	9.621	8,6
20	TAP Air Portugal	8.146	-0,3
21	Austrian Airlines AG	8.013	-8,9
22	Wizz Air	7.916	24,3
23	Finnair	7.046	5,3
24	Aer Lingus	6.731	-6,1
25	HOP!	6.304	-11,0

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

Source: OAG 2013/14, DLR 2013/14

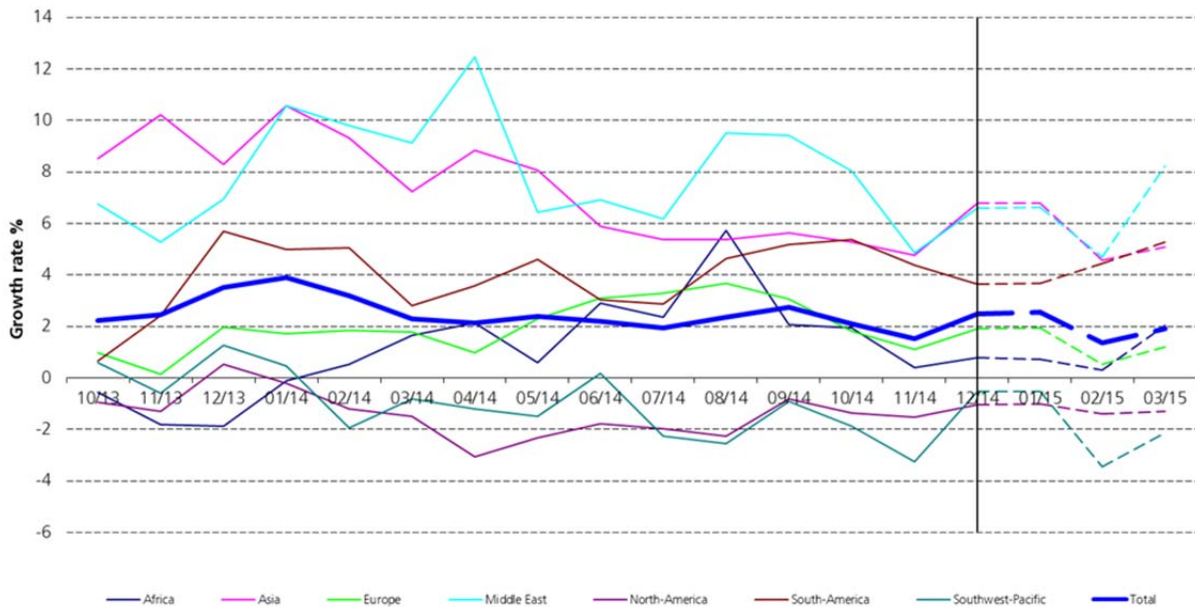
Development of the Global Air Transport Supply



Source: OAG 2013/2014, DLR 2013/2014

Fig. 1: Development of the Global Air Transport Supply

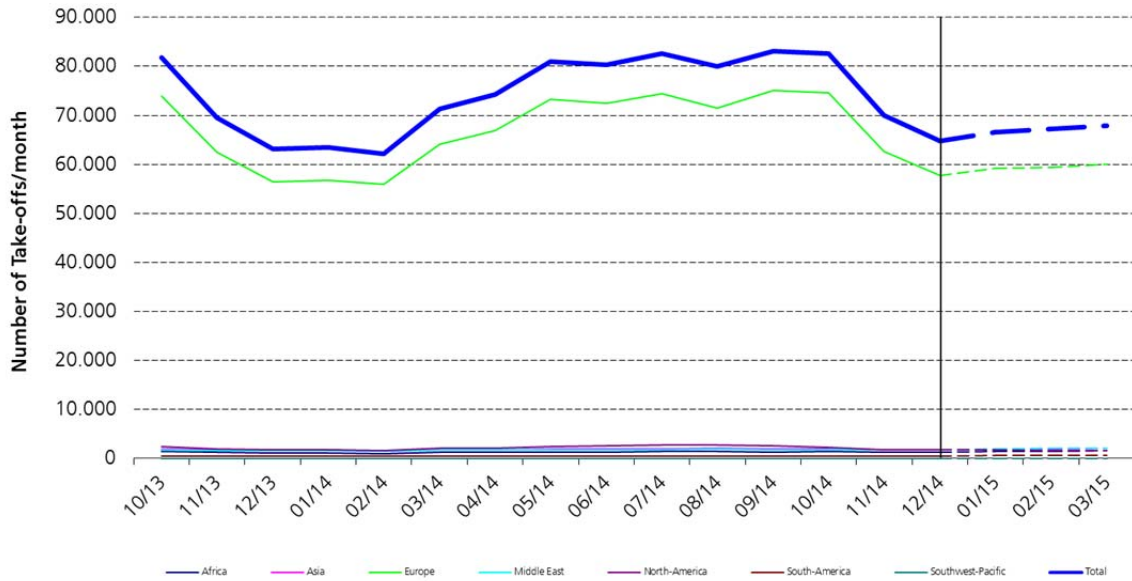
Changes in the Global Air Transport Supply



Source: OAG 2013/2014, DLR 2013/2014

Fig. 2: Changes in the Global Air Transport Supply

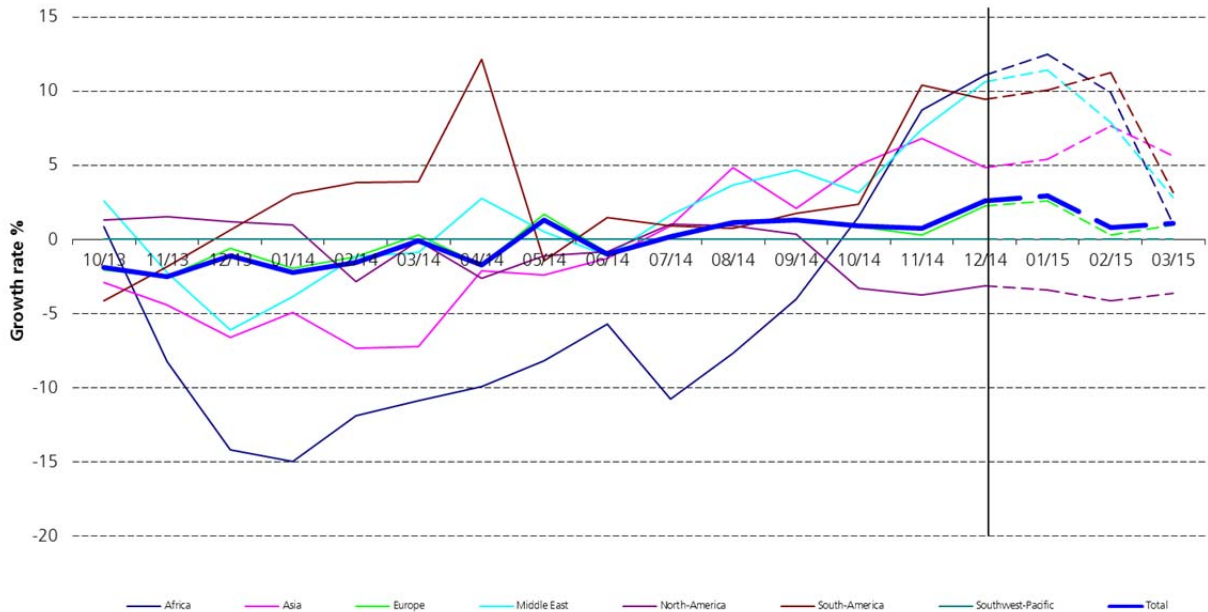
Development of the German Air Transport Supply



Source: OAG 2013/2014, DLR 2013/2014

Fig. 3: Development of the German Air Transport Supply

Changes in the German Air Transport Supply



Source: OAG 2013/2014, DLR 2013/2014

Fig. 4: Changes in the German Air Transport Supply

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