

# Global Aviation Monitor (GAM)

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

March 2015



## 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: April 2014 – March 2015

#### Global

- March 2015: 2.8 M flights supplied (+3.5%)
- 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 (+18.7%)
- Airlines: Heterogeneous development of no. of flights offered; strong growth of Aeroflot, AVIANCA, Ryanair and China Eastern; strong decrease of United Airlines and Air France

#### 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 Dublin however decline at some airports, e.g. Moscow Domodedovo and Oslo
- Airlines: Heterogeneous developments of flights, some airlines, e.g. Aeroflot and Alitalia with strong growth, some growth in the low cost segment, e.g. Wizz, Ryanair, germanwings and Vueling (former Lufthansa flights in Germany and Europe are now operated by germanwings except at Frankfurt and Munich), some airlines, e.g. Austrian Airlines and Air France with decrease

#### Germany

- Airports: Some airports, e.g. Dresden, Hamburg, Stuttgart, Hahn and Berlin Schoenefeld, with traffic growth; some German airports with downward trend, e.g. Munster and Niederrhein
- Airlines: Heterogeneous developments of number of flights offered; strong growth of germanwings, Alitalia and Wizz; some airlines, e.g. Swiss and Air France, with decreasing traffic

### Outlook: April 2015 – June 2015

#### Global

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

#### World Regions, Europe

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#### Germany

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Rank	Airport	03/2015	Growth rate
1	Atlanta Hartsfield-Jackson Intl	37.213	-1,6
2	Chicago O'Hare International	36.750	0,0
3	Dallas/Fort Worth Intl	28.718	2,0
4	Los Angeles International	25.395	1,7
5	Beijing Capital	24.879	3,2
6	Denver Intl	22.720	-4,6
7	Charlotte	22.064	-1,3
8	Houston George Bush Intercontinental	20.663	-2,1
9	London Heathrow	19.846	0,3
10	Shanghai Pudong International	18.830	18,7
11	Frankfurt International	18.550	-1,2
12	Tokyo Haneda	18.341	6,9
13	Jakarta Soekarno-Hatta	18.010	4,5
14	Istanbul Ataturk	17.765	7,7
15	Paris Charles de Gaulle	17.721	-0,8
16	Phoenix Sky Harbor Intl .	17.543	0,9
17	Guangzhou	17.464	5,5
18	New York J F Kennedy International	17.404	3,6
19	Amsterdam	17.311	3,6
20	Toronto Lester B Pearson Intl	17.198	3,5
21	Newark Liberty International	16.652	-0,4
22	Hong Kong International	16.604	6,8
23	San Francisco International	16.502	-1,5
24	Dubai	16.421	5,0
25	Mexico City Juarez International	16.381	8,4

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

Rank	Airport	03/2015	Growth rate
1	Frankfurt International	18.550	-1,2
2	Munich International	15.062	0,0
3	Dusseldorf International	7.915	3,9
4	Berlin Tegel	7.253	2,2
5	Hamburg	5.820	9,3
6	Stuttgart	3.626	9,2
7	Cologne/Bonn K.A.	3.206	7,9
8	Berlin Schoenefeld	2.209	12,0
9	Hanover	1.991	2,6
10	Nuremberg	1.475	-4,2
11	Bremen	1.013	-1,8
12	Dresden	855	20,8
13	Leipzig/Halle	844	5,0
14	Frankfurt Hahn	653	15,2
15	Dortmund	515	8,9
16	Dusseldorf Niederrhein	379	-3,1
17	Friedrichshafen	332	19,4
18	Munster	323	-7,7
19	Saarbrücken/Ennsheim	264	12,3
20	Karlsruhe/Baden Baden	259	9,7
21	Memmingen	242	51,3
22	Paderborn	210	-3,2
23	Mannheim	79	---
24	Augsburg	52	2,0
25	Erfurt	46	9,5

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

Rank	Airport	03/2015	Growth rate
1	London Heathrow	19.846	0,3
2	Frankfurt International	18.550	-1,2
3	Istanbul Ataturk	17.765	7,7
4	Paris Charles de Gaulle	17.721	-0,8
5	Amsterdam	17.311	3,6
6	Munich International	15.062	0,0
7	Madrid Barajas	14.148	7,1
8	Rome Fiumicino	12.143	5,8
9	Barcelona	10.297	3,0
10	Moscow Sheremetyevo International	10.025	2,4
11	Copenhagen	9.961	1,0
12	London Gatwick	9.677	4,5
13	Paris Orly	9.588	-0,1
14	Oslo	9.435	-3,2
15	Zurich	9.223	2,0
16	Stockholm Arlanda	9.162	0,0
17	Vienna	9.038	-1,9
18	Moscow Domodedovo	8.738	-7,7
19	Brussels	8.293	4,9
20	Dusseldorf International	7.915	3,9
21	Berlin Tegel	7.253	2,2
22	Istanbul Sabiha Gokcen	7.144	22,6
23	Dublin	6.962	11,8
24	Helsinki	6.614	2,1
25	Geneva	6.533	2,2

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

Rank	Airline	03/2015	Growth rate
1	Delta Air Lines	160.324	0,0
2	United Airlines	148.984	-10,5
3	Southwest Airlines	110.731	9,2
4	American Airlines	108.990	-0,4
5	US Airways	93.783	-3,7
6	China Southern Airlines	59.781	9,1
7	China Eastern Airlines	52.093	12,2
8	Air Canada	48.661	3,4
9	Lufthansa German Airlines	43.184	-12,4
10	Ryanair	39.403	14,6
11	easyJet	36.307	5,6
12	Air China	36.081	6,4
13	Turkish Airlines	35.826	7,2
14	All Nippon Airways	32.748	-5,5
15	British Airways	30.437	3,8
16	Air France	29.793	-10,3
17	Alaska Airlines	28.734	6,8
18	JetBlue Airways Corporation	26.850	5,1
19	Gol Transportes Aereos	26.743	2,8
20	SAS Scandinavian Airlines	26.676	0,3
21	Azul	24.123	8,3
22	Qantas Airways	23.828	-0,6
23	Aeroflot Russian Airlines	23.733	34,0
24	AVIANCA	22.841	16,1
25	Japan Airlines International	22.816	2,4

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

Rank	Airline	03/2015	Growth rate
1	Lufthansa German Airlines	26.224	-12,8
2	Air Berlin	10.170	2,5
3	germanwings	8.572	56,1
4	easyJet	2.098	18,6
5	Ryanair	1.827	13,8
6	British Airways	1.400	5,3
7	KLM-Royal Dutch Airlines	1.299	0,1
8	SAS Scandinavian Airlines	1.226	10,3
9	Turkish Airlines	1.195	9,3
10	Air France	1.183	-14,8
11	Condor Flugdienst	1.056	14,8
12	Swiss	998	-1,7
13	Austrian Airlines AG	862	4,2
14	Aeroflot Russian Airlines	747	35,8
15	TUIfly	673	-1,0
16	Air Dolomiti	592	33,0
17	Luxair	471	0,9
18	Intersky	470	33,9
19	SunExpress	457	14,0
20	Wizz Air	449	46,3
21	Germania	400	41,8
22	Flybe	399	75,0
23	United Airlines	386	4,0
24	Norwegian Air Shuttle	385	15,6
25	Alitalia	350	138,1

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

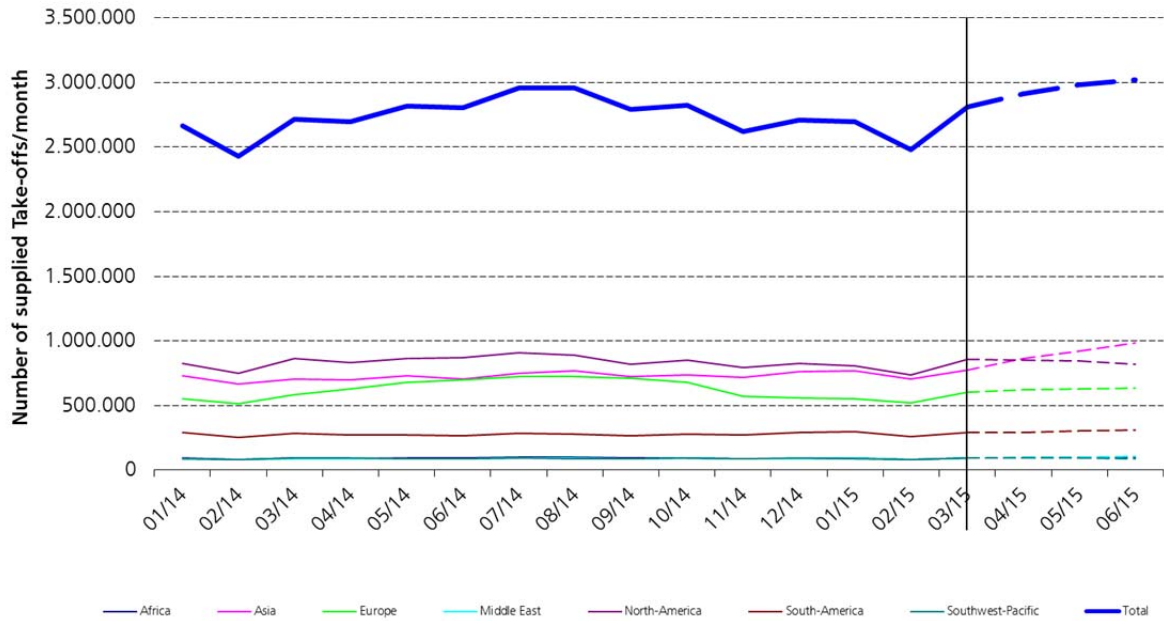
Rank	Airline	03/2015	Growth rate
1	Lufthansa German Airlines	39.444	-13,1
2	Ryanair	38.750	14,9
3	easyJet	35.607	5,8
4	Turkish Airlines	30.858	7,5
5	SAS Scandinavian Airlines	26.363	0,2
6	Air France	26.311	-11,7
7	British Airways	25.001	5,5
8	Aeroflot Russian Airlines	20.098	36,7
9	KLM-Royal Dutch Airlines	16.467	0,4
10	Alitalia	15.461	22,5
11	Flybe	15.353	16,7
12	Air Berlin	14.833	-0,5
13	Iberia	14.758	7,7
14	Norwegian Air Shuttle	13.804	-0,3
15	germanwings	12.957	58,3
16	Wideroe's Flyveselskap	11.729	2,3
17	Swiss	10.940	-1,9
18	Vueling Airlines	10.791	25,6
19	Pegasus Airlines	10.339	14,5
20	Austrian Airlines AG	8.981	-3,9
21	Wizz Air	8.520	28,0
22	Finnair	8.250	6,2
23	TAP Air Portugal	8.239	3,8
24	HOP!	7.447	-5,3
25	Aer Lingus	7.094	-5,4

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

Source: OAG 2014/15, DLR 2014/15



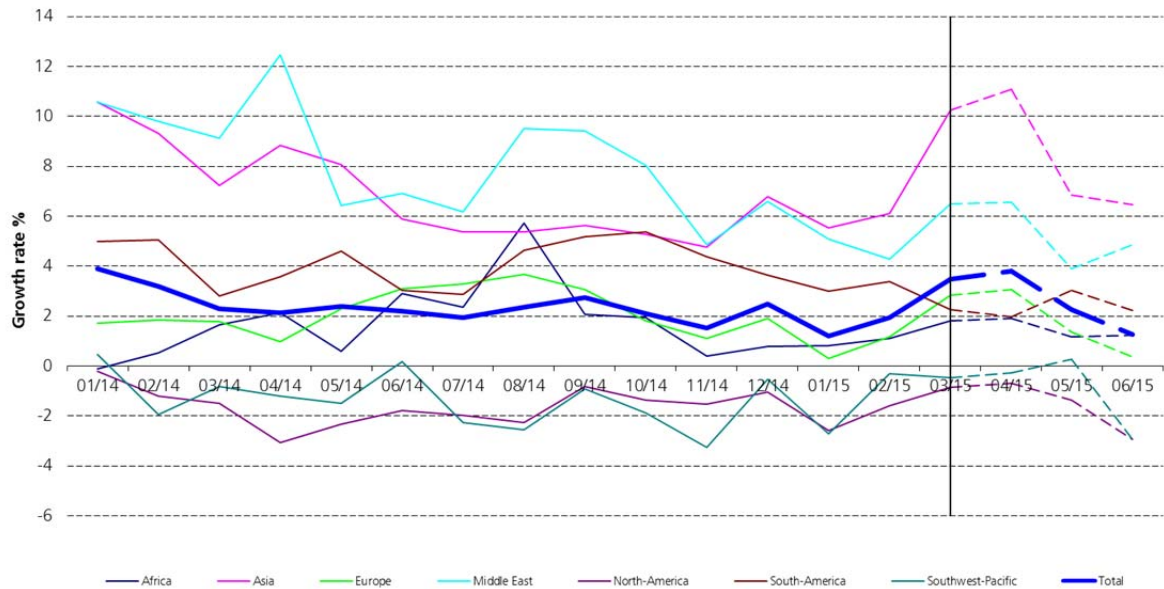
Development of the Global Air Transport Supply



Source: OAG 2013/2014, DLR 2013/2014

Fig. 1: Development of the Global Air Transport Supply

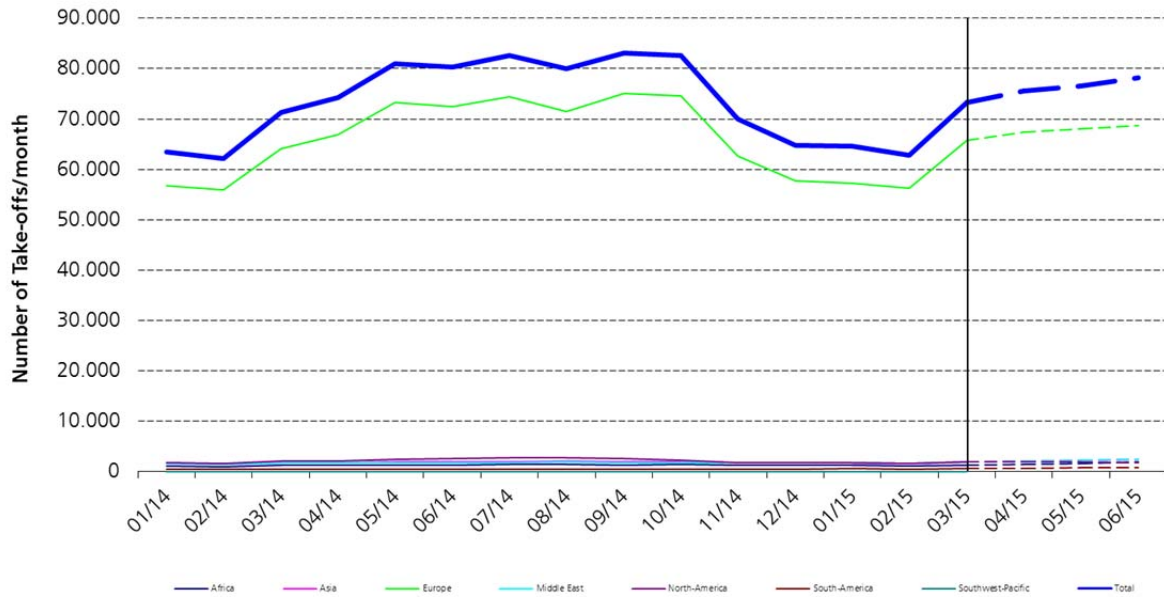
Changes in the Global Air Transport Supply



Source: OAG 2013/2014, DLR 2013/2014

Fig. 2: Changes in the Global Air Transport Supply

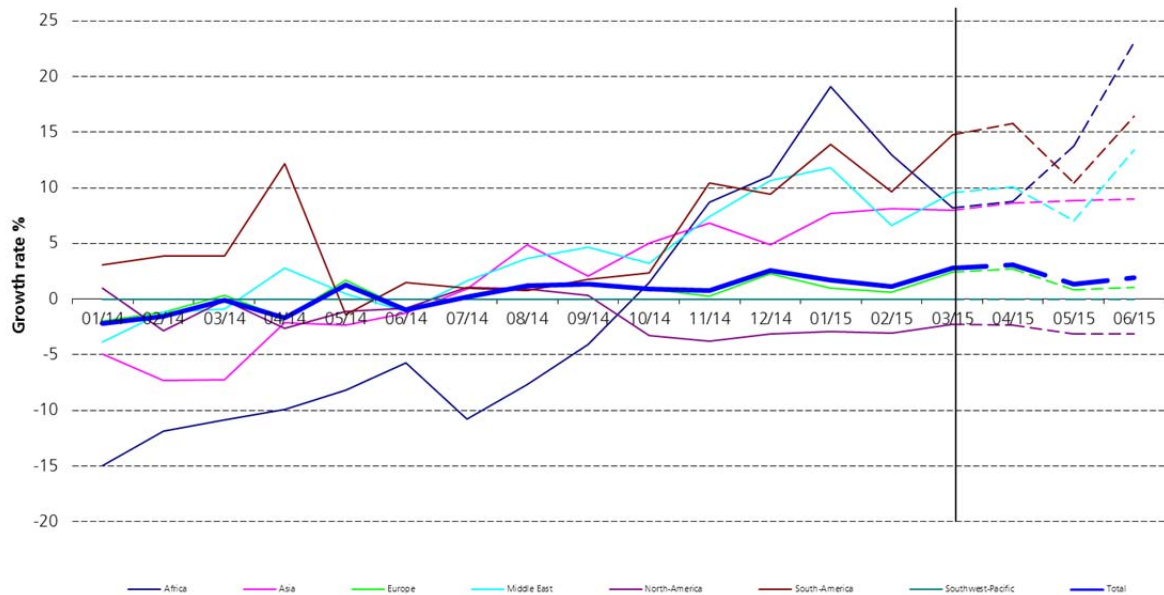
Development of the German Air Transport Supply



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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