

Global Aviation Monitor (GAM)

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

September 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 2015: July with 3.08 M flights
- Air traffic increases slowly since April 2013
- Forecasting methodology: Time series analysis

Analysis: October 2014 – September 2015

Global

- September 2015: 2.9 M flights supplied (+3.3%)
- 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 e.g. at Shanghai Pudong (+13.6%) or Dubai (+10.6%)
- Airlines: Heterogeneous development of no. of flights offered; strong growth e.g. of Aeroflot, Turkish Airlines and JetBlue; strong decrease of United Airlines

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 Stockholm Arlanda
- Airlines: Heterogeneous developments of flights, some airlines, e.g. Aeroflot and Turkish Airlines with strong growth, some growth in the low cost segment, e.g. Wizz, Ryanair, easyjet, 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 Berlin and Air France with decrease

Germany

- Airports: Some airports, e.g. Hamburg, Stuttgart, Berlin Schoenefeld and some small airports, with traffic growth; some German airports with downward trend, e.g. Leipzig and Bremen
- Airlines: Heterogeneous developments of number of flights offered; strong growth of e.g. Ryanair, easyjet Germania and Wizz; some airlines, e.g. Air Berlin and Air France, with decreasing traffic

Outlook: October 2015 – December 2015

Global

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

World Regions, Europe

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

Germany

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

Rank	Airport	09/2015	Growth rate
1	Chicago O'Hare International	36.016	-5,5
2	Atlanta Hartsfield-Jackson Intl	35.204	1,4
3	Dallas/Fort Worth Intl	26.768	-2,1
4	Los Angeles International	24.746	1,2
5	Beijing Capital	24.123	-1,6
6	Denver Intl	21.214	-8,1
7	Frankfurt International	20.739	0,3
8	London Heathrow	20.312	1,8
9	Charlotte	20.195	-1,1
10	Istanbul Ataturk	19.856	9,0
11	Shanghai Pudong International	19.749	13,6
12	Amsterdam	19.608	2,6
13	Paris Charles de Gaulle	19.549	1,8
14	Houston George Bush Intercontinental	18.432	-4,3
15	Tokyo Haneda	17.854	0,8
16	New York J F Kennedy International	17.628	2,8
17	Toronto Lester B Pearson Intl	17.475	2,9
18	Jakarta Soekarno-Hatta	17.444	3,7
19	Guangzhou	16.788	-1,3
20	San Francisco International	16.464	-3,2
21	Dubai	16.389	10,6
22	Munich International	16.291	1,6
23	Hong Kong International	16.079	4,0
24	Seattle/Tacoma International	15.911	13,5
25	Philadelphia International	15.882	-2,3

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

Rank	Airport	09/2015	Growth rate
1	Frankfurt International	20.739	0,3
2	Munich International	16.291	1,6
3	Dusseldorf International	9.327	1,7
4	Berlin Tegel	8.090	2,0
5	Hamburg	6.414	3,8
6	Stuttgart	4.751	7,1
7	Cologne/Bonn K.A.	4.268	2,5
8	Berlin Schoenefeld	2.530	10,7
9	Hanover	2.369	0,0
10	Nuremberg	1.762	-0,1
11	Bremen	1.195	-8,0
12	Leipzig/Halle	993	-5,1
13	Dresden	894	-8,0
14	Frankfurt Hahn	836	-1,2
15	Dortmund	615	-8,8
16	Dusseldorf Niederrhein	588	0,7
17	Munster	490	9,9
18	Karlsruhe/Baden Baden	474	32,4
19	Friedrichshafen	415	17,6
20	Memmingen	374	42,2
21	Saarbrücken Ensheim	334	21,5
22	Paderborn	324	-0,9
23	Westerland	190	11,1
24	Mannheim	80	81,8
25	Erfurt	71	9,2

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

Rank	Airport	09/2015	Growth rate
1	Frankfurt International	20.739	0,3
2	London Heathrow	20.312	1,8
3	Istanbul Ataturk	19.856	9,0
4	Amsterdam	19.608	2,6
5	Paris Charles de Gaulle	19.549	1,8
6	Munich International	16.291	1,6
7	Madrid Barajas	15.468	8,6
8	Rome Fiumicino	14.651	2,1
9	Barcelona	13.123	2,7
10	London Gatwick	12.492	4,3
11	Moscow Sheremetyevo International	10.979	7,0
12	Copenhagen	10.911	2,3
13	Paris Orly	10.585	0,6
14	Zurich	10.394	0,1
15	Oslo	10.304	-0,9
16	Vienna	10.198	-0,8
17	Moscow Domodedovo	10.113	-3,5
18	Stockholm Arlanda	9.679	-2,3
19	Brussels	9.608	0,9
20	Istanbul Sabiha Gokcen	9.531	27,5
21	Dusseldorf International	9.327	1,7
22	Palma Mallorca	9.194	3,0
23	Dublin	8.269	9,0
24	Berlin Tegel	8.090	2,0
25	Manchester International	7.839	0,2

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

Source: OAG 2014/15, DLR 2014/15

Rank	Airline	09/2015	Growth rate
1	Delta Air Lines	149.132	-0,7
2	United Airlines	135.829	-9,6
3	Southwest Airlines	101.721	6,8
4	American Airlines	101.284	1,2
5	US Airways	85.375	-5,1
6	China Southern Airlines	61.317	2,1
7	China Eastern Airlines	54.424	9,2
8	Ryanair	53.530	6,6
9	Air Canada	49.181	3,1
10	Lufthansa German Airlines	46.197	-4,7
11	easyJet	43.127	5,3
12	Turkish Airlines	42.083	13,9
13	Air China	36.694	6,8
14	British Airways	31.657	4,3
15	Air France	30.791	-3,9
16	All Nippon Airways	30.228	-5,9
17	Alaska Airlines	28.282	6,4
18	SAS Scandinavian Airlines	28.146	-1,3
19	Aeroflot Russian Airlines	25.848	11,6
20	JetBlue Airways Corporation	25.058	10,1
21	Gol Transportes Aereos	24.858	-4,3
22	Azul	23.239	-2,2
23	Qantas Airways	23.106	-0,2
24	Japan Airlines International	22.239	-0,0
25	AVIANCA	21.835	-1,9

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

Rank	Airline	09/2015	Growth rate
1	Lufthansa German Airlines	27.945	-4,7
2	Air Berlin	11.647	-5,3
3	germanwings	9.731	6,8
4	Ryanair	2.983	19,4
5	easyJet	2.325	15,0
6	Condor Flugdienst	1.961	2,1
7	Turkish Airlines	1.549	14,4
8	TUIfly	1.502	4,1
9	KLM-Royal Dutch Airlines	1.412	-0,2
10	British Airways	1.390	11,8
11	Air France	1.263	-2,7
12	SAS Scandinavian Airlines	1.261	4,6
13	SunExpress	1.100	41,2
14	Swiss	1.034	-1,1
15	Germania	988	103,7
16	Austrian Airlines AG	909	4,6
17	Aeroflot Russian Airlines	706	2,3
18	Wizz Air	639	45,9
19	SunExpress Deutschland	598	91,7
20	Vueling Airlines	532	8,4
21	Air Dolomiti	513	-2,8
22	Intersky	499	33,1
23	Luxair	440	-5,2
24	Pegasus Airlines	438	25,1
25	United Airlines	429	-2,5

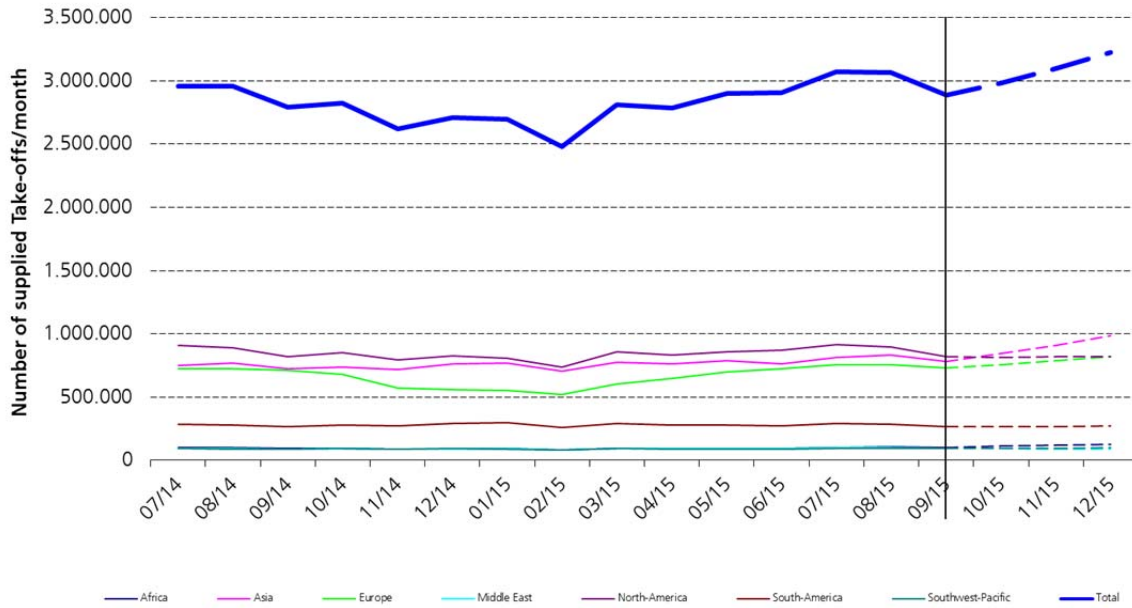
Tab. 6: Number of monthly Take-offs by the biggest Airlines in Germany from German airports

Rank	Airline	09/2015	Growth rate
1	Ryanair	52.835	6,5
2	easyJet	42.536	5,3
3	Lufthansa German Airlines	42.159	-5,1
4	Turkish Airlines	37.223	14,8
5	SAS Scandinavian Airlines	27.788	-1,3
6	Air France	27.272	-3,8
7	British Airways	26.391	5,5
8	Aeroflot Russian Airlines	21.961	11,6
9	Air Berlin	18.617	-5,9
10	KLM-Royal Dutch Airlines	18.042	-0,2
11	Alitalia	17.902	15,1
12	Vueling Airlines	17.745	12,1
13	Iberia	16.139	8,2
14	Norwegian Air Shuttle	15.851	-0,9
15	Flybe	15.428	4,2
16	germanwings	15.402	7,5
17	Pegasus Airlines	12.827	14,7
18	Swiss	11.905	1,4
19	Wideroe's Flyveselskap	11.599	-1,2
20	Wizz Air	10.990	22,5
21	Austrian Airlines AG	10.349	-1,9
22	Finnair	9.670	19,1
23	TAP Air Portugal	9.201	-3,4
24	Aegean Airlines	8.553	10,6
25	Aer Lingus	8.546	-3,0

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

Source: OAG 2014/15, DLR 2014/15

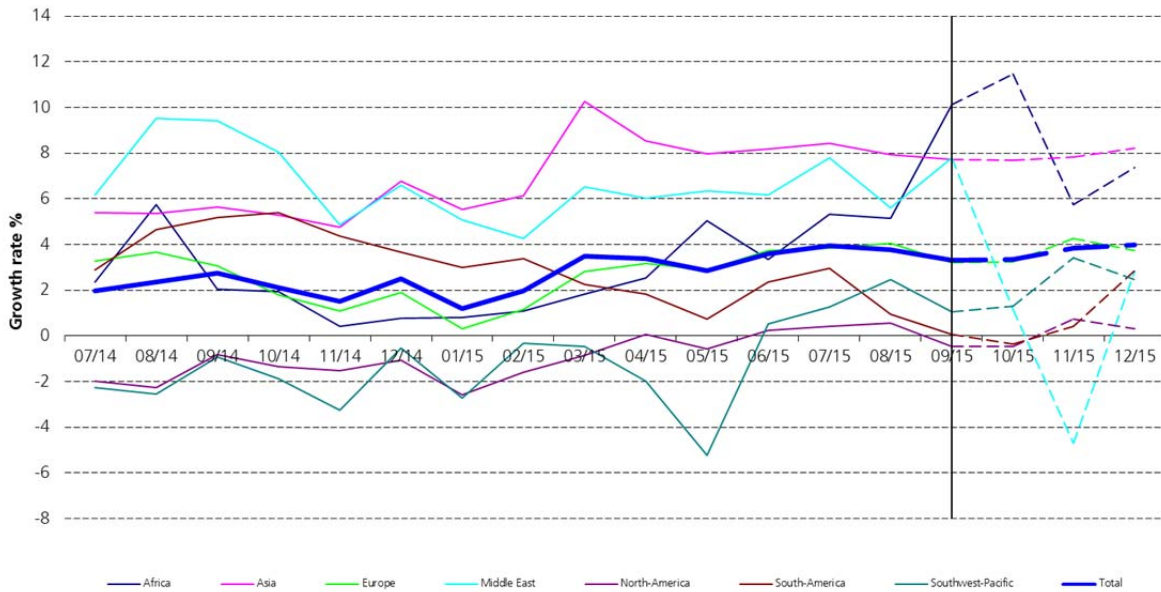
Development of the Global Air Transport Supply



Source: OAG 2014/2015, DLR 2014/2015

Fig. 1: Development of the Global Air Transport Supply

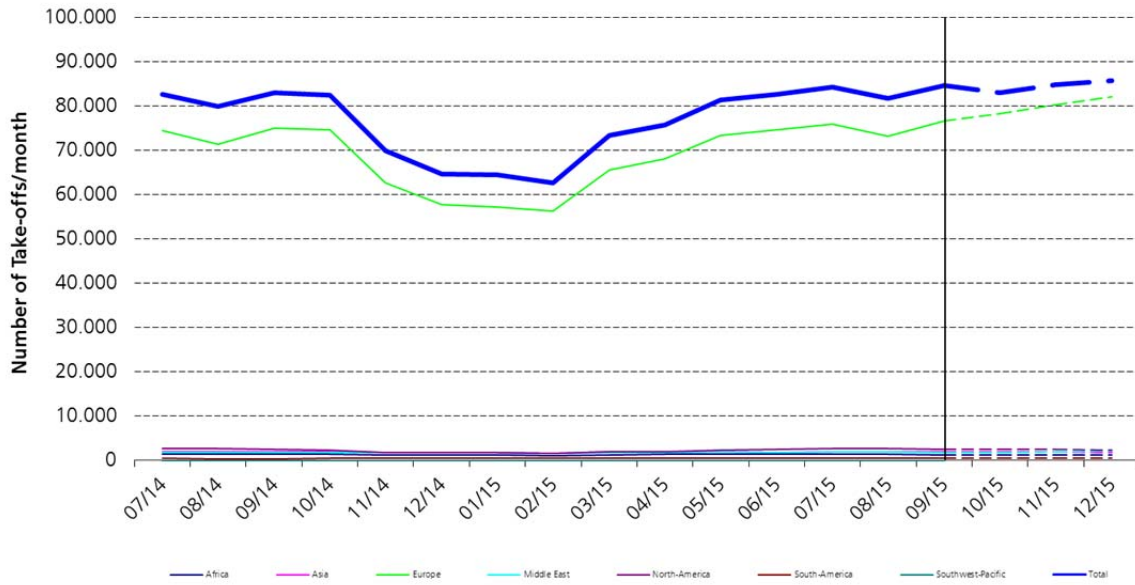
Changes in the Global Air Transport Supply



Source: OAG 2014/2015, DLR 2014/2015

Fig. 2: Changes in the Global Air Transport Supply

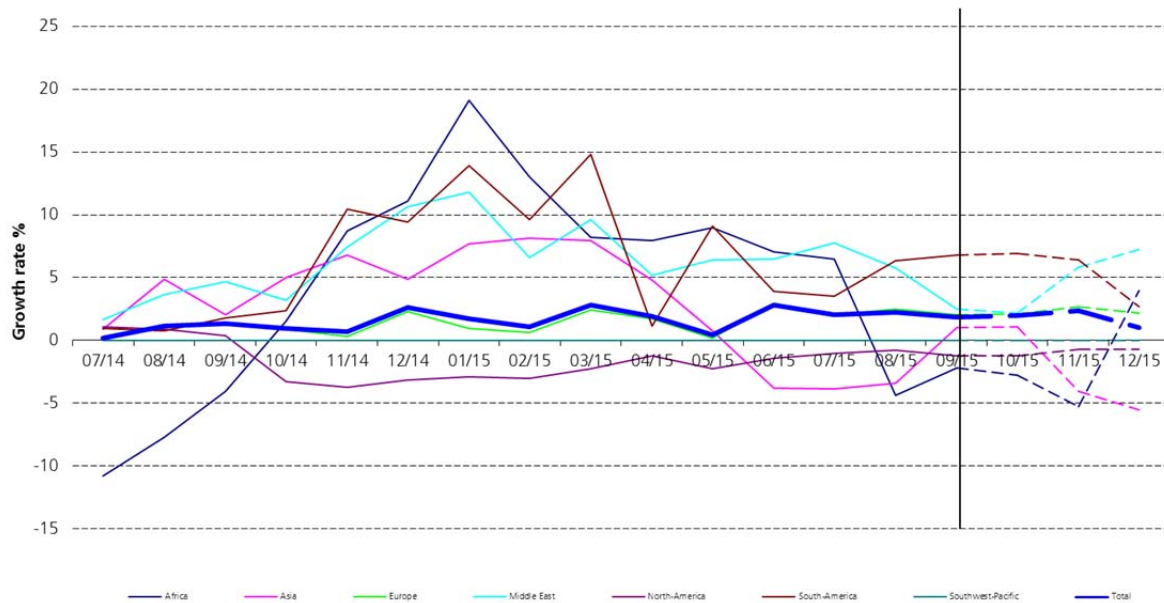
Development of the German Air Transport Supply



Source: OAG 2014/2015, DLR 2014/2015

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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