

# Global Aviation Monitor (GAM)

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

December 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 2015: More than 34 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: January 2015 – December 2015

#### Global

- December 2015: 2.8 M flights supplied (+3.6%)
- 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; growth rates of around 3% since March 2015
- Airports: Heterogeneous development of no. of flights offered; strong growth e.g. at Shanghai Pudong, Tokyo Haneda, Jakarta, Dubai or Istanbul Ataturk (between +5% and +8%)
- Airlines: Heterogeneous development of no. of flights offered; strong growth e.g. of Turkish Airlines and Ryanair; American Airlines merger with US Airways

#### 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
- Airlines: Heterogeneous developments of flights, some airlines, e.g. Turkish Airlines with strong growth, some growth in the low cost segment, e.g. Wizz, Ryanair and easyjet; new: Eurowings (former Lufthansa and germanwings flights in Germany and Europe are now operated by Eurowings except at Frankfurt and Munich; long-haul low cost flights from Cologne), some airlines, e.g. Air Berlin and Air France with decrease

#### Germany

- Airports: Some bigger airports, e.g. Cologne, Stuttgart, and some small airports e.g. Memmingen, with traffic growth; strong growth at Berlin Schoenefeld because of strong growth of Ryanair; 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: January 2016 – March 2016

#### Global

- For the next few months, a small traffic growth of 2-4% is expected

#### World Regions, Europe

- For the next few months, a small traffic growth of 2-4% is expected

#### Germany

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

Rank	Airport	12/2015	Growth rate
1	Atlanta Hartsfield-Jackson Intl	35.552	3,0
2	Chicago O'Hare International	34.367	-2,7
3	Dallas/Fort Worth Intl	27.834	-2,9
4	Los Angeles International	25.461	0,7
5	Beijing Capital	25.206	0,7
6	Denver Intl	22.126	-1,3
7	Charlotte	21.247	-1,4
8	Houston George Bush Intercontinental	20.000	-2,4
9	Tokyo Haneda	19.334	6,3
10	Shanghai Pudong International	19.224	5,0
11	Istanbul Ataturk	18.757	7,9
12	London Heathrow	18.607	-0,5
13	Jakarta Soekarno-Hatta	18.454	6,4
14	New York J F Kennedy International	18.148	4,3
15	Paris Charles de Gaulle	17.493	0,8
16	Mexico City Juarez International	17.083	3,9
17	Hong Kong International	17.012	4,7
18	Amsterdam	16.998	4,6
19	Dubai	16.959	5,9
20	Guangzhou	16.908	-2,0
21	Toronto Lester B Pearson Intl	16.731	1,4
22	San Francisco International	16.633	-1,2
23	Frankfurt International	16.487	-0,1
24	Phoenix Sky Harbor Intl .	16.434	1,4
25	Newark Liberty International	16.301	0,0

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

Rank	Airport	12/2015	Growth rate
1	Frankfurt International	16.487	-0,1
2	Munich International	12.995	-0,9
3	Dusseldorf International	6.811	-2,2
4	Berlin Tegel	6.754	3,3
5	Hamburg	4.950	-2,3
6	Stuttgart	3.370	5,6
7	Cologne/Bonn K.A.	3.122	8,2
8	Berlin Schoenefeld	2.901	42,2
9	Hanover	1.618	-0,9
10	Nuremberg	1.242	-3,3
11	Bremen	850	-7,0
12	Dresden	718	-9,5
13	Leipzig/Halle	670	-14,8
14	Frankfurt Hahn	603	-2,9
15	Dortmund	485	-3,0
16	Dusseldorf Niederrhein	301	-15,0
17	Munster	283	1,8
18	Karlsruhe/Baden Baden	236	5,4
19	Saarbrücken Ensheim	195	-12,2
20	Memmingen	177	14,9
21	Friedrichshafen	146	-39,2
22	Paderborn	128	-22,0
23	Mannheim	84	13,5
24	Rostock-Laage	47	11,9
25	Erfurt	38	18,8

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

Rank	Airport	12/2015	Growth rate
1	Istanbul Ataturk	18.757	7,9
2	London Heathrow	18.607	-0,5
3	Paris Charles de Gaulle	17.493	0,8
4	Amsterdam	16.998	4,6
5	Frankfurt International	16.487	-0,1
6	Madrid Barajas	14.109	6,1
7	Munich International	12.995	-0,9
8	Rome Fiumicino	11.396	0,1
9	Moscow Sheremetyevo International	10.170	6,3
10	Barcelona	9.635	5,7
11	London Gatwick	9.427	6,3
12	Copenhagen	9.102	11,4
13	Paris Orly	9.080	0,1
14	Zurich	8.749	-0,3
15	Istanbul Sabiha Gokcen	8.470	26,8
16	Moscow Domodedovo	8.225	-15,0
17	Vienna	8.128	-1,2
18	Oslo	8.021	1,9
19	Brussels	7.723	3,1
20	Stockholm Arlanda	7.628	2,7
21	Dublin	7.095	10,9
22	Dusseldorf International	6.811	-2,2
23	Berlin Tegel	6.754	3,3
24	Lisbon	6.288	6,6
25	Helsinki	5.959	5,2

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

Source: OAG 2014/15, DLR 2014/15

Rank	Airline	12/2015	Growth rate
1	American Airlines	193.475	79,0
2	Delta Air Lines	150.574	1,6
3	United Airlines	137.939	-5,7
4	Southwest Airlines	109.595	7,1
5	China Eastern Airlines	55.576	11,4
6	China Southern Airlines	55.488	-3,1
7	Air Canada	46.319	-0,5
8	Ryanair	43.637	18,7
9	Turkish Airlines	38.731	11,8
10	Air China	37.298	7,3
11	Lufthansa German Airlines	37.114	-2,2
12	easyJet	34.061	5,0
13	All Nippon Airways	32.278	-5,7
14	Alaska Airlines	29.479	6,7
15	JetBlue Airways Corporation	28.571	6,4
16	Gol Transportes Aereos	27.901	-4,6
17	British Airways	27.856	2,3
18	Air France	27.737	-5,6
19	Azul	24.174	-1,0
20	Qantas Airways	23.314	1,1
21	Aeroflot Russian Airlines	23.087	2,0
22	Japan Airlines International	22.874	0,1
23	AVIANCA	22.646	-2,1
24	TAM Linhas Aereas	21.467	-9,6
25	SAS Scandinavian Airlines	21.179	3,4

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

Rank	Airline	12/2015	Growth rate
1	Lufthansa German Airlines	22.512	-2,0
2	Air Berlin	8.081	-5,7
3	germanwings	5.922	-22,2
4	Ryanair	2.741	61,4
5	easyJet	2.036	3,9
6	Eurowings	2.001	---
7	Turkish Airlines	1.330	12,6
8	British Airways	1.174	1,6
9	KLM-Royal Dutch Airlines	1.174	-2,8
10	Air France	1.066	-3,7
11	Swiss	967	3,1
12	Condor Flugdienst	900	-5,3
13	SAS Scandinavian Airlines	856	-2,7
14	Austrian Airlines AG	771	5,3
15	Aeroflot Russian Airlines	722	-1,5
16	Wizz Air	587	32,5
17	TUIfly	570	21,3
18	Germania	507	65,1
19	SunExpress	427	24,1
20	Alitalia	411	58,7
21	Flybe	402	15,2
22	Pegasus Airlines	383	26,0
23	Iberia	369	5,4
24	Air Dolomiti	341	-24,6
25	United Airlines	337	-0,9

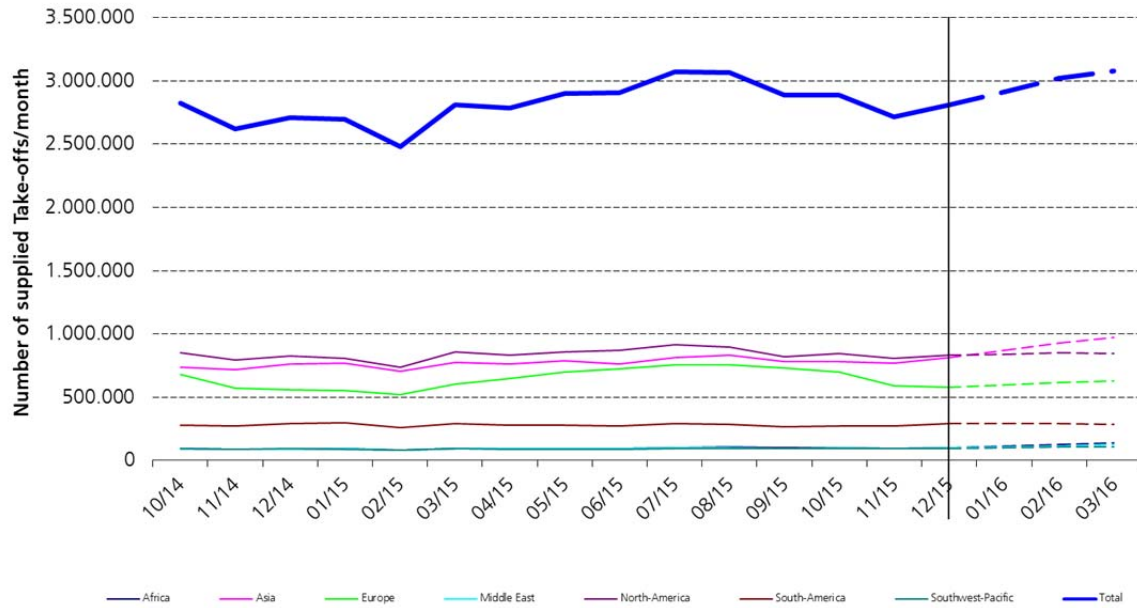
Tab. 6: Number of monthly Take-offs by the biggest Airlines in Germany from German airports

Rank	Airline	12/2015	Growth rate
1	Ryanair	42.960	19,0
2	Lufthansa German Airlines	33.909	-2,3
3	Turkish Airlines	33.708	12,7
4	easyJet	33.453	5,2
5	Air France	24.248	-6,2
6	British Airways	22.743	3,0
7	SAS Scandinavian Airlines	20.866	3,2
8	Aeroflot Russian Airlines	19.496	2,3
9	KLM-Royal Dutch Airlines	15.577	0,6
10	Alitalia	15.015	15,2
11	Iberia	14.268	6,9
12	Flybe	13.564	1,4
13	Pegasus Airlines	11.909	23,8
14	Air Berlin	11.831	-7,0
15	Vueling Airlines	10.877	4,2
16	Swiss	10.739	2,5
17	Wideroe's Flyveselskap	10.600	1,0
18	Wizz Air	9.835	24,2
19	Norwegian Air Shuttle	8.580	-25,8
20	germanwings	8.290	-27,2
21	TAP Air Portugal	8.244	1,2
22	Finnair	8.181	16,1
23	Austrian Airlines AG	8.005	-0,1
24	Aer Lingus	7.070	5,0
25	HOP!	6.755	7,2

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

Source: OAG 2014/15, DLR 2014/15

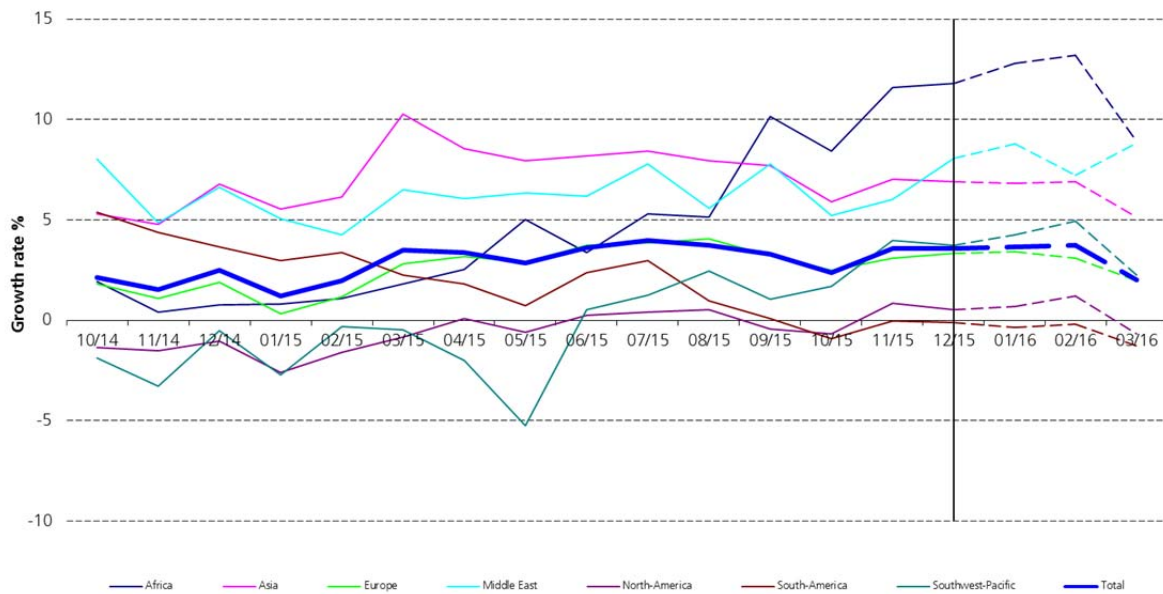
Development of the Global Air Transport Supply



Source: OAG 2014/2015, DLR 2014/2015

Fig. 1: Development of the Global Air Transport Supply

Changes in the Global Air Transport Supply

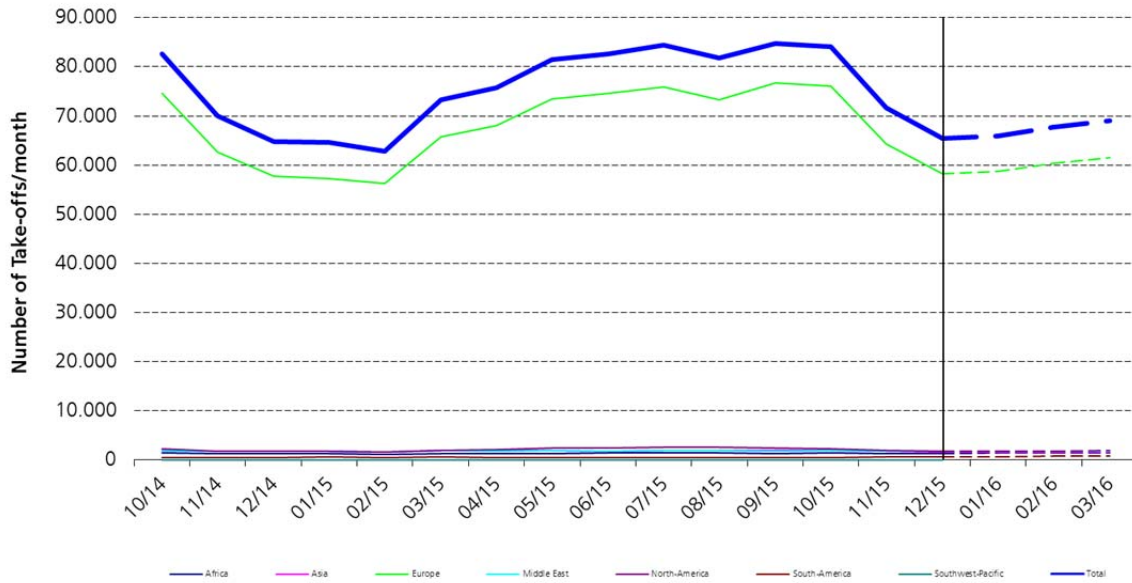


Source: OAG 2014/2015, DLR 2014/2015

Fig. 2: Changes in the Global Air Transport Supply



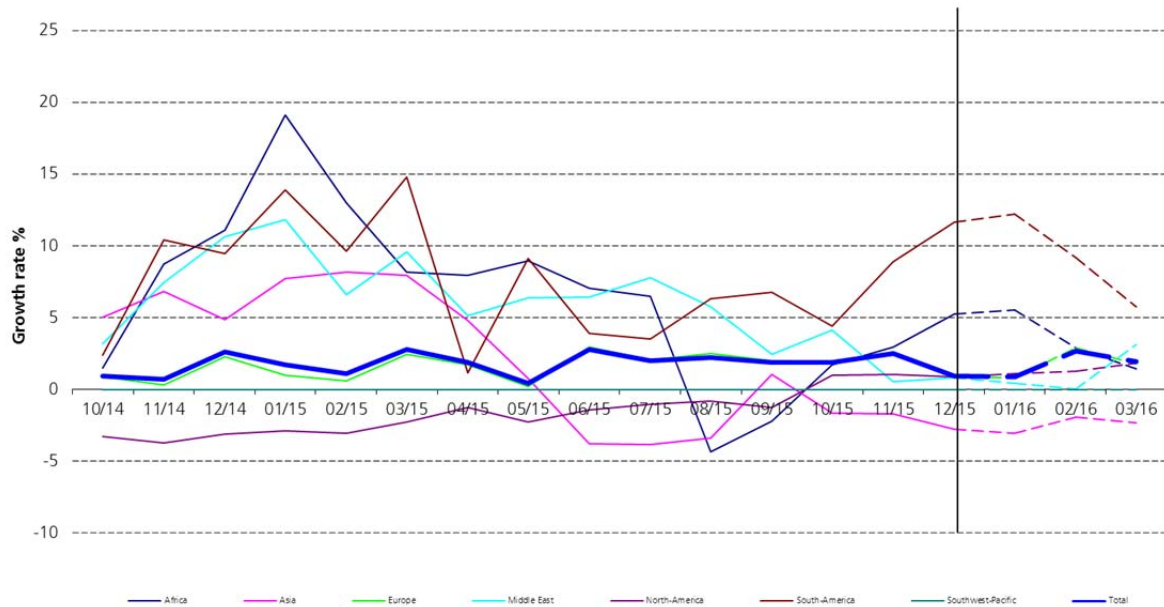
Development of the German Air Transport Supply



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 2014/2015, DLR 2014/2015

Fig. 4: Changes in the German Air Transport Supply

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