

# Global Aviation Monitor (GAM)

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

June 2017



## 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 2016: More than 35 M flights (non-stop) worldwide, new record value
- Busiest month 2017: May with 3.2 M flights
- Air traffic increases slowly since April 2013
- Forecasting methodology: Time series analysis
- The mean absolute forecast error over a twelve month period typically lies in a range of between 0.5 and 1.5 percentage points for a forecast horizon of 1, 2 & 3 months.

### Analysis: July 2016 – June 2017

#### Global

- History: 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, 3.0%-5.3% between December 2015 and June 2017
- June 2017: 3.2 M flights supplied (+4.9%)
- Airports: Heterogeneous development of no. of flights offered; strong growth e.g. at Guangzhou, Shanghai, Jakarta and Dehli (5% and more)
- Airlines: Heterogeneous development of no. of flights offered; strong growth e.g. of Ryanair, easyjet, Aeroflot, Jetblue and IndiGo; some airlines with decrease, e.g. Turkish Airlines

#### World Regions, Europe

- In Europe, 4.5% traffic increase; in Asia continued growth around 10%; strong growth in Africa, too; small decrease in North America
- Airports: Heterogeneous developments of no. of flights offered; strong increase e.g. at Barcelona, Moscow, Manchester and Nice, however, decline at some airports, e.g. Istanbul and Rome Fiumicino
- Airlines: Heterogeneous developments of flights, some airlines, e.g. Aeroflot and LOT with strong growth, strong growth in the low cost segment, e.g. Wizz, flybe, Ryanair and easyjet; new: Eurowings (former Lufthansa and germanwings flights in Germany and Europe are now operated by Eurowings except at Frankfurt; long-haul low cost flights from Cologne). Air Berlin: new strategy: a) core business: Long-haul, b) tourist: Niki, c) wetlease: Eurowings. Some airlines, e.g. Turkish Airlines and Swiss with decrease

#### Germany

- Airports: Some bigger airports, e.g. Berlin-Schoenefeld and some small airports e.g. Paderborn, with strong traffic growth; some German airports with downward trend, e.g. Bremen
- Airlines: Heterogeneous developments of number of flights offered; strong growth of e.g. Ryanair and Wizz Air; some airlines, e.g. Turkish Airlines with decreasing traffic

### Outlook: July 2017 – September 2017

#### Global

- For the next few months, a traffic growth of around 5 % is expected

#### World Regions, Europe

- For the next few months, a traffic growth of 2-5 % is expected

#### Germany

- For the next few months, a traffic growth of 1-4 % is expected

Rank	Airport	06/2017	Growth rate
1	Atlanta Hartsfield-Jackson Intl	37.007	-2,1
2	Chicago O'Hare International	36.515	-3,4
3	Los Angeles International	27.630	-1,3
4	Dallas/Fort Worth Intl	26.575	-5,6
5	Beijing Capital	25.291	1,3
6	Denver Intl	23.479	0,7
7	Charlotte	21.623	0,2
8	Amsterdam	21.295	3,8
9	Shanghai Pudong International	20.798	7,1
10	Frankfurt International	20.130	-0,5
11	London Heathrow	20.127	-0,6
12	Paris Charles de Gaulle	19.604	-0,6
13	New York J F Kennedy International	18.972	-1,8
14	Guangzhou	18.968	7,3
15	Jakarta Soekarno-Hatta	18.661	9,3
16	Toronto Lester B Pearson Intl	18.625	2,0
17	Istanbul Ataturk	18.561	-3,3
18	Houston George Bush Intercontinental	18.379	-7,0
19	Tokyo Haneda	18.197	0,8
20	San Francisco International	18.196	-10,6
21	Delhi	18.048	12,0
22	Seattle/Tacoma International	17.786	-2,4
23	Newark Liberty International	17.227	1,8
24	Munich International	16.944	-0,2
25	Hong Kong International	16.803	2,3

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

Rank	Airport	06/2017	Growth rate
1	Frankfurt International	20.130	-0,5
2	Munich International	16.944	-0,2
3	Dusseldorf International	9.801	1,1
4	Berlin Tegel	8.167	0,6
5	Hamburg	6.391	0,5
6	Stuttgart	4.699	-0,3
7	Cologne/Bonn K.A.	4.432	1,7
8	Berlin Schoenefeld	3.638	8,7
9	Hanover	2.358	2,7
10	Nuremberg	1.935	13,8
11	Bremen	1.034	-10,9
12	Leipzig/Halle	982	5,1
13	Dresden	849	-8,0
14	Frankfurt Hahn	729	-3,1
15	Dusseldorf Niederrhein	593	1,9
16	Dortmund	587	-0,8
17	Karlsruhe/Baden Baden	509	3,7
18	Munster	492	2,1
19	Saarbrücken Ensheim	323	4,2
20	Memmingen	293	3,5
21	Paderborn	275	7,4
22	Friedrichshafen	248	-33,0
23	Westerland	159	2,6
24	Rostock-Laage	140	59,1
25	Erfurt	130	34,0

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

Rank	Airport	06/2017	Growth rate
1	Amsterdam	21.295	3,8
2	Frankfurt International	20.130	-0,5
3	London Heathrow	20.127	-0,6
4	Paris Charles de Gaulle	19.604	-0,6
5	Istanbul Ataturk	18.561	-3,3
6	Munich International	16.944	-0,2
7	Madrid Barajas	16.185	3,5
8	Barcelona	14.580	6,2
9	Rome Fiumicino	13.272	-4,8
10	London Gatwick	13.148	3,1
11	Moscow Sheremetyevo International	12.225	13,0
12	Palma Mallorca	11.040	8,2
13	Copenhagen	10.906	-3,4
14	Moscow Domodedovo	10.425	15,3
15	Zurich	10.288	-0,9
16	Paris Orly	10.167	-3,7
17	Stockholm Arlanda	10.056	6,6
18	Oslo	10.032	0,2
19	Vienna	9.998	-1,1
20	Dusseldorf International	9.801	1,1
21	Dublin	9.716	3,8
22	Brussels	9.426	2,4
23	Manchester International	9.042	6,4
24	Istanbul Sabiha Gokcen	9.023	-3,8
25	Nice	8.638	9,3

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

Source: OAG 2016/17, DLR 2016/17

Rank	Airline	06/2017	Growth rate
1	American Airlines	189.618	-5,8
2	Delta Air Lines	165.932	-0,5
3	United Airlines	139.271	-2,7
4	Southwest Airlines	114.578	0,0
5	Ryanair	65.248	9,7
6	China Southern Airlines	60.664	6,9
7	China Eastern Airlines	56.466	2,6
8	Air Canada	50.111	0,7
9	easyJet	48.539	7,1
10	Lufthansa German Airlines	44.213	-1,5
11	Turkish Airlines	39.959	-1,8
12	Air China	37.906	0,4
13	British Airways	31.735	-2,0
14	Alaska Airlines	31.521	0,6
15	JetBlue Airways Corporation	30.742	6,4
16	All Nippon Airways	30.212	0,5
17	Air France	29.328	-0,1
18	IndiGo Air	28.210	17,1
19	Aeroflot Russian Airlines	27.990	10,8
20	SAS Scandinavian Airlines	25.369	-4,7
21	Japan Airlines International	23.597	5,3
22	Qantas Airways	22.435	-0,1
23	Xiamen Airlines Company	22.221	7,7
24	AVIANCA	22.018	-0,1
25	KLM-Royal Dutch Airlines	21.832	5,7

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

Rank	Airline	06/2017	Growth rate
1	Lufthansa German Airlines	26.774	-2,4
2	Air Berlin	8.794	-26,6
3	Eurowings	5.833	113,7
4	germanwings	4.867	-34,7
5	Ryanair	4.569	23,8
6	easyJet	2.496	6,6
7	NIKI	2.039	50875,0
8	Condor Flugdienst	2.025	18,2
9	TUIfly	1.548	2,1
10	KLM-Royal Dutch Airlines	1.371	-1,1
11	Austrian Airlines AG	1.341	5,6
12	British Airways	1.310	-6,4
13	Turkish Airlines	1.292	-5,9
14	Germania	1.221	23,0
15	SunExpress	1.217	41,0
16	Air France	1.183	-6,3
17	Swiss	1.033	-11,5
18	Wizz Air	864	24,0
19	SAS Scandinavian Airlines	825	-20,7
20	Aeroflot Russian Airlines	781	11,9
21	British Midland Regional	647	5,7
22	Flybe	566	22,0
23	Air Dolomiti	559	-1,9
24	LOT - Polish Airlines	474	39,0
25	SunExpress Deutschland	472	2,6

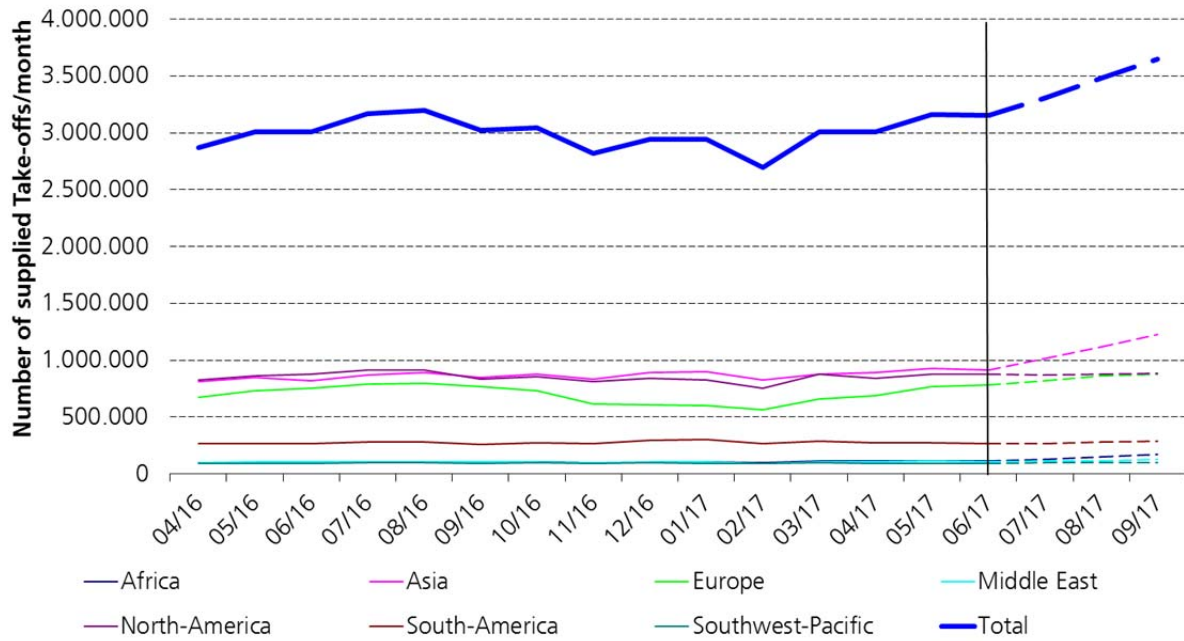
Tab. 6: Number of monthly Take-offs by the largest Airlines in Germany from German airports

Rank	Airline	06/2017	Growth rate
1	Ryanair	64.497	9,6
2	easyJet	48.160	7,2
3	Lufthansa German Airlines	40.467	-1,7
4	Turkish Airlines	34.918	-2,2
5	British Airways	26.527	-2,1
6	Air France	25.818	-0,5
7	SAS Scandinavian Airlines	24.936	-4,9
8	Aeroflot Russian Airlines	23.610	11,4
9	KLM-Royal Dutch Airlines	19.750	5,9
10	Flybe	18.522	11,5
11	Vueling Airlines	18.158	-1,6
12	Iberia	16.601	-0,1
13	Alitalia	16.371	-4,1
14	Wizz Air	13.864	16,7
15	Pegasus Airlines	13.735	7,3
16	Air Berlin	11.945	-35,7
17	Austrian Airlines AG	11.408	6,1
18	Swiss	11.188	-5,7
19	Eurowings	10.793	132,3
20	Wideroe's Flyveselskap	10.196	-4,9
21	TAP Air Portugal	9.778	7,7
22	Norwegian Air Shuttle	9.722	-14,4
23	Aer Lingus	9.342	-1,2
24	Finnair	9.160	5,0
25	LOT - Polish Airlines	8.608	22,2

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

Source: OAG 2016/17, DLR 2016/17

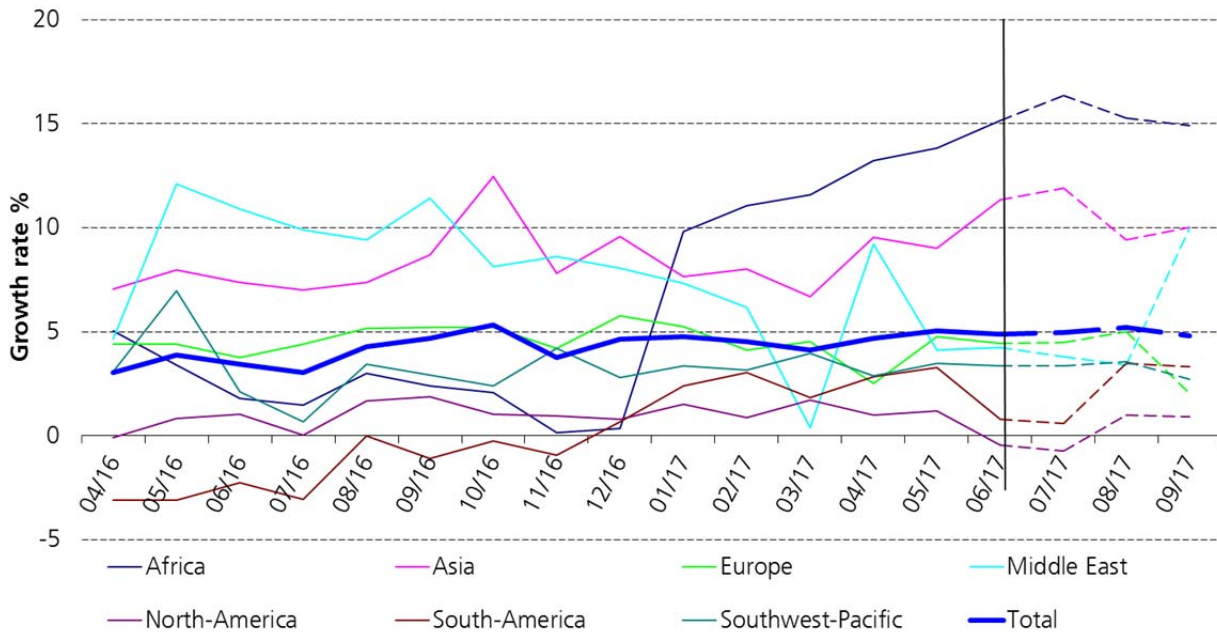
### Development of the Global Air Transport Supply



Source: OAG 2016/2017, DLR 2016/2017

Fig. 1: Development of the Global Air Transport Supply

### Changes in the Global Air Transport Supply



Source: OAG 2016/2017, DLR 2016/2017

Fig. 2: Changes in the Global Air Transport Supply

### Development of the German Air Transport Supply

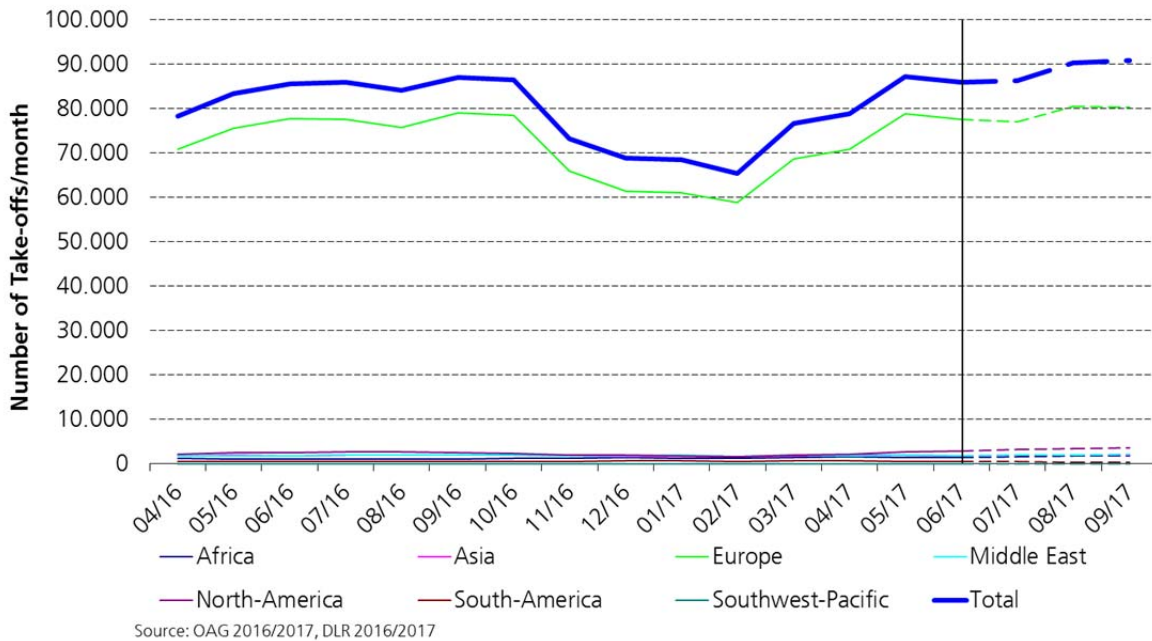


Fig. 3: Development of the German Air Transport Supply

### Changes in the German Air Transport Supply

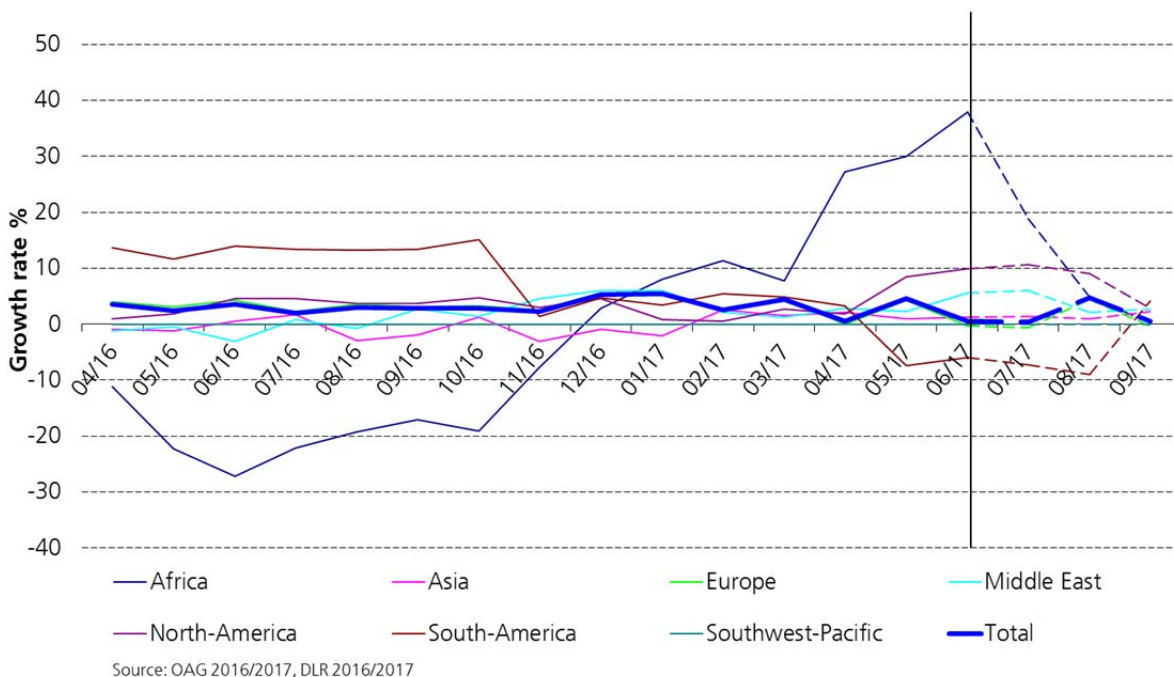


Fig. 4: Changes in the German Air Transport Supply

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