

## Travel Catering Research Centre Quarterly Report

### Europe

## October - December 2007 Forecast



### Passenger Numbers by Overall Route (millions)

	Jul-Sept '07	Jul-Sept'06	% change	Oct-Dec '06	Forecast
Europe	78.09	72.50	7.72%	64.53	69.51
Intercontinental	22.11	20.72	6.73%	18.40	19.64
Total	100.21	93.22	7.50%	82.94	89.16

The passenger numbers on intercontinental routes increase at 6.73% in this quarter, whereas growth in the domestic route is at 7.72%.

### Passenger Numbers by Seat Class (millions)

	Jul-Sept '07	Jul-Sept'06	% change	Oct-Dec '06	Forecast
First	3.56	3.31	8%	2.94	3.17
Business	18.91	19.07	-1%	15.65	15.51
Economy	77.74	70.84	10%	64.34	70.62

A slight decline in business class (-1%) is experienced at this quarter, whereas first and business class increase at respectively 8% and 10%.

### Passenger Numbers by Carrier (millions)

	Jul-Sept '07	Jul-Sept'06	% change	Oct-Dec '06	Forecast
<b>Air France/KLM</b>	20.49	19.62	4.43%	17.83	18.62
<b>Alitalia</b>	6.84	6.75	1.45%	5.75	5.83
<b>British Airways</b>	9.18	9.89	-7.19%	8.53	7.92
<b>Finnair</b>	1.84	1.96	-6.11%	1.75	1.64
<b>Iberia</b>	7.22	7.35	-1.81%	6.68	6.56
<b>Lufthansa</b>	18.83	14.77	27.48%	13.23	16.86
<b>SAS</b>	11.03	10.14	8.74%	9.61	10.45
<b>easyJet</b>	10.87	9.33	16.54%	8.13	9.47
<b>Ryanair</b>	13.95	11.48	21.53%	10.25	12.46

This quarter saw a major increase by Lufthansa at 27.48% followed by Ryanair (21.53%) and easyJet (16.54%). British Airways (-7.19%), Finnair (-6.11%) and Iberia (-1.81%) went through a decrease in this quarter.

### Estimated Complimentary Meal Numbers by Route (millions)

	Jul-Sept '07	Jul-Sept'06	% change	Oct-Dec '06	Forecast
Europe (non-domestic)	25.73	23.92	7.55%	20.02	21.53
Europe – Africa	4.83	4.54	6.42%	4.22	4.49
Europe – Middle East	2.44	2.05	19.03%	1.93	2.30
Europe – Atlantic	17.52	16.48	6.36%	13.80	14.69
Far East/Australasia	7.32	7.08	3.31%	6.77	6.99
Totals	57.84	54.07	7%	46.74	50.00

The route to Middle East had increased by 19.03% in the this quarter. The remainder of the routes faces around 6-7% increase with the exception of the Far East/Australasia route (3.31%).

## Headlines

### **Scandinavian Airlines Adds New Long-Haul Routes**

SAS International adds two new routes to its intercontinental network this month. On October 29, SAS will commence a thrice-weekly service between Stockholm and Bangkok, and on October 31, SAS will launch a new route between Copenhagen and Dubai. The Stockholm-Bangkok route complements the existing Copenhagen-Bangkok route, while Dubai is a new destination for SAS International. SAS will this year have launched three new long-haul routes: In March, Stockholm-Beijing was introduced, in addition to Copenhagen- Beijing. The Stockholm-Bangkok route will operate to March 25, and Copenhagen-Dubai to March 29. Both routes will be served three times a week with an Airbus A340-300, offering passengers a choice of three service classes: Business, Economy Extra and Economy, with full service class flexibility when booking.

11 October 2007, [www.btctravel.com](http://www.btctravel.com)

### **Lufthansa To Add Five Weekly Singapore - Munich Flights From June 2008**

Lufthansa has announced the introduction of five weekly non-stop flights between Singapore and Munich, effective from 8th June 2008. With timely connections from Brisbane, Melbourne and Perth, this offers greater and more convenient choice for Lufthansa clients travelling on to Munich and Europe. The additional flights will increase the airline's operation to a total of 12 weekly flights between Singapore and Germany via both Frankfurt and Munich hubs, offering passengers easy and efficient connections to 108 destinations across Europe and beyond. Lufthansa's Singapore-Munich flights will be operated by a three-cabin, 221 seat Airbus A340-300, giving travellers an additional 1,105 seats per week between Singapore and Germany. The new flights provide passengers with both day and night flight options for their convenience.

8 November 2007, [www.btctravel.com](http://www.btctravel.com)

### **Finnair and Aeroflot To Double Frequencies On Helsinki-Moscow Route**

As of April 2008, Finnair and Aeroflot will cooperate on flights between Helsinki and Moscow that will run four times a day, a total of 28 times a week. At present Finnair operates seven weekly flights on its own Airbus A320 aircraft on the route. Aeroflot operates the same number of flights using its own Airbus A319 aircraft. Both airlines operate at Moscow's Sheremetyevo airport. As a result of code share cooperation, Finnish and Russian business and leisure passengers will be able to fly choose morning and evening connections between the two cities. The Moscow flights also have excellent connections with Finnair's flights to New York. About a quarter of sales on the route also include a flight to the United States.

23 November 2007, [www.btctravel.com](http://www.btctravel.com)

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### Explanations

#### **Passenger Numbers by Route**

*The data in this table is derived from the Monthly Traffic Snapshots found on the Association of European Airlines (AEA) web pages.*

*% change - This compares the last full quarter of this year with the same quarter in the previous year.*

*Forecast - The forecast is based on the trend derived from the equivalent quarter of the previous year and the percentage change in the last full quarter.*

#### **Passenger Numbers by Seat Class**

*The data in this table is derived from data found on Euromonitor's web pages. The seat class data is defined by country and is then applied to the major carrier for that country.*

#### **Passenger Numbers by Carrier**

*The data in this table is derived from the individual carrier's websites.*

*% change – Please see above.*

*Forecast – Please see above.*

#### **Estimated Complimentary Meal Numbers by Route**

*The data in this table is calculated by taking the total passenger numbers provided by the AEA (this specifically excludes budget airlines and charter passenger numbers) and applying a multiplier to provide an estimate of the total number of meals provided to passengers. The multipliers used are based upon consensus meal values agreed upon by a panel of experts and are subject to change on a monthly basis.*

*% change – Please see above.*

*Forecast – Please see above.*