

Traffic Figures

09 September 2009

EUROPEAN AIRLINE TRAFFIC IN JULY, PRELIMINARY RESULTS FOR AUGUST

The Association of European Airlines has released traffic and capacity data for its members in July 2009, along with a projection for August.

The overall picture remained depressed, with passenger traffic volume 2.3% below the level of July 2008, which itself was already influenced by the market downturn. The major operating regions posted rather larger deficits: -4.3% on the North Atlantic, -3.9% on the Far East and -3.4% on cross-border services within Europe. The impact on the overall figure was mitigated slightly by some growth in African and Middle Eastern services.

The tempo of capacity reduction, which had been around -5% in the two previous months, moderated to -3.2%, which nevertheless more than matched the traffic decrease and produced a slight load factor improvement, by 0.7 points to 81.8%.

Said AEA Secretary General Ulrich Schulte-Strathaus: *"if the industry cannot make money in the peak Summer season, it is clearly in a desperate situation, and yet our members are reporting ongoing losses. If the airlines cannot make money when they are 81.8% full, there is clearly something very wrong with the cost/revenue relationship"*.

"That is precisely what has happened. The premium-travel market has taken a huge hit from the financial and economic crises. Airlines across Europe are offering great deals to business passengers, but are still not managing to re-energise the market".

The outcome, he said, was that unit revenues had fallen dramatically, and the industry was unable to match this with a corresponding decrease in unit cost. *"So much of our cost base is largely or entirely beyond our control – airport charges, air traffic control fees, security costs, the price of fuel ,, , not to mention the cost of compliance with new and proposed regulation, which only ever goes up, never down"*, said Ulrich Schulte-Strathaus.

Along with the July figures, AEA reported an outlook for August which indicated a very similar result. Based on weekly returns, the projection was for a 2.0% loss in traffic and a 3.2% decrease in capacity, with once again a slight load factor improvement.

For further information, please contact:

David Henderson, Manager Information (+32 2) 639 89 72

- Adria Airways
- Aer Lingus
- AeroSvit
- Air France
- Air Malta
- Alitalia
- Austrian
- bmi
- British Airways
- Brussels Airlines
- Cargolux
- Croatia Airlines
- Cyprus Airways
- Czech Airlines
- DHL
- Finnair
- Iberia
- Icelandair
- Jat Airways
- KLM
- LOT
- Lufthansa
- Luxair
- Malev
- Olympic Airlines
- SAS Scandinavian Airlines
- SWISS
- TAP Portugal
- TAROM
- TNT Airways
- Turkish Airlines
- Ukraine International Airlines
- Virgin Atlantic Airways

Traffic Update



Scheduled Services of AEA Member Airlines

JULY 2009

REGION	PASSENGER DATA								FREIGHT DATA	
	Passengers boarded (000)	Traffic RPK (mill)	Capacity ASK (mill)	Load Factor %	Change to Previous Year				Traffic TFTK (mill)	TFTK %
					Pax %	Traffic %	Capacity %	PLF Pts		
Domestic (1)	8 038.1	4 445.0	6 181.3	71.9	-4.7	-2.6	-5.9	2.5	7.5	-20.9
Cross-border Europe (2)	15 736.4	17 849.4	23 237.2	76.8	-4.4	-3.4	-5.1	1.4	58.9	-7.5
Total Europe (1+2)	23 774.5	22 294.5	29 418.5	75.8	-4.5	-3.2	-5.3	1.6	66.3	-9.2
Europe - North Africa (3)	502.8	991.9	1 294.1	76.6	10.2	13.8	14.1	-0.2	16.0	21.2
Europe - Middle East (4)	943.0	2 994.9	3 986.4	75.1	12.9	12.2	18.5	-4.2	102.0	17.1
Intl Short/Medium Haul (2+3+4)	17 398.2	21 836.2	28 517.7	76.6	-2.0	-0.8	-1.6	0.6	176.8	7.9
North Atlantic (5)	2 849.7	19 575.9	22 315.4	87.7	-4.4	-4.3	-6.4	1.9	748.4	-15.4
Mid Atlantic (6)	589.7	4 552.1	5 316.0	85.6	-5.1	-2.9	-2.0	-0.8	116.1	0.3
South Atlantic (7)	509.7	4 553.6	5 407.6	84.2	-5.1	-2.9	0.0	-2.5	188.1	-18.0
Europe - Sub Saharan Africa (8)	806.2	5 183.8	6 223.5	83.3	6.2	5.4	6.8	-1.0	260.7	-8.0
Europe - Far East/Australasia (9)	1 612.3	13 252.1	15 789.9	83.9	-4.4	-3.9	-5.0	1.0	1 135.3	-23.2
Total Longhaul (5 to 9^x)	6 397.3	47 153.3	55 100.7	85.6	-3.2	-2.9	-3.6	0.6	2 448.7	-18.2
Total International (2 to 9^x)	23 579.5	68 989.5	83 618.4	82.5	-3.2	-2.3	-2.9	0.6	2 625.5	-16.8
Total Scheduled (1 to 9^x)	31 617.6	73 434.5	89 799.7	81.8	-3.6	-2.3	-3.2	0.7	2 633.0	-16.8

JANUARY - JULY 2009

REGION	PASSENGER DATA								FREIGHT DATA	
	Passengers boarded (000)	Traffic RPK (mill)	Capacity ASK (mill)	Load Factor %	Change to Previous Year				Traffic TFTK (mill)	TFTK %
					Pax %	Traffic %	Capacity %	PLF Pts		
Domestic (1)	50 884.5	27 170.6	41 598.6	65.3	-10.9	-9.7	-8.3	-1.0	51.1	-21.6
Cross-border Europe (2)	91 368.9	99 194.5	147 462.6	67.3	-8.2	-7.0	-5.2	-1.3	385.2	-14.4
Total Europe (1+2)	142 253.4	126 365.1	189 061.2	66.8	-9.2	-7.6	-5.9	-1.2	436.2	-15.3
Europe - North Africa (3)	2 710.5	5 379.1	7 986.3	67.4	0.6	1.3	4.7	-2.3	134.9	27.0
Europe - Middle East (4)	5 174.9	17 101.0	25 072.7	68.2	6.2	4.0	11.9	-5.1	609.4	1.6
Intl Short/Medium Haul (2+3+4)	100 505.9	121 674.5	180 521.5	67.4	-6.1	-5.2	-2.7	-1.8	1 129.5	-2.3
North Atlantic (5)	15 483.1	106 578.1	133 444.7	79.9	-7.8	-7.6	-6.6	-0.9	4 984.6	-20.7
Mid Atlantic (6)	3 795.3	28 756.4	35 008.2	82.1	-7.0	-6.2	-3.6	-2.3	773.9	-9.2
South Atlantic (7)	3 123.1	27 992.5	35 849.0	78.1	-7.5	-6.5	-3.7	-2.4	1 232.3	-25.4
Europe - Sub Saharan Africa (8)	4 886.6	32 108.1	41 632.1	77.1	1.8	0.6	0.6	0.0	1 803.3	-10.1
Europe - Far East/Australasia (9)	10 184.5	82 933.3	106 044.8	78.2	-7.8	-7.9	-4.9	-2.5	7 266.7	-26.5
Total Longhaul (5 to 9^x)	37 613.3	278 577.8	352 330.7	79.1	-6.5	-6.6	-4.7	-1.6	16 061.3	-22.4
Total International (2 to 9^x)	136 867.6	400 252.4	532 852.2	75.1	-7.1	-6.2	-4.0	-1.7	17 190.8	-21.3
Total Scheduled (1 to 9^x)	187 752.1	427 423.0	574 450.8	74.4	-8.2	-6.4	-4.4	-1.6	17 241.9	-21.3

Passenger traffic is measured in Passengers boarded (Pax), RPK (Revenue Passenger-Kms) and capacity in ASK (Available Seat-Kms).

Freight traffic is measured in TFTK (Total Freight Tonne-Kms) on passenger and all-cargo services, excluding mail.

Growth rates have been adjusted for changes in membership.

Introduced in 2004, new route area Total Europe includes 'international' or Cross-border Europe services and Domestic services.

(^x) Longhaul region 'Other' is not shown above, but is included in the total.

Traffic Update



TOTAL SCHEDULED
Scheduled Services by Airline

JULY 2009

AIRLINE	PASSENGER DATA								FREIGHT DATA	
	Passengers boarded (000)	Traffic RPK (mill)	Capacity ASK (mill)	Load Factor %	Change to Previous Year				Traffic TFTK (mill)	TFTK %
					Pax %	Traffic %	Capacity %	PLF Pts		
AF - AIR FRANCE	4 617.3	12 243.3	14 600.6	83.9	-3.7	-2.9	-4.0	1.0	409.2	-19.5
AY - FINNAIR	564.3	1 521.6	1 875.5	81.1	-4.9	-6.4	-8.7	2.0	41.4	-14.3
AZ - ALITALIA	2 214.9	2 913.1	4 009.3	72.7	0.0	0.0	0.0	0.0	31.9	0.0
BA - BRITISH AIRWAYS PLC	3 201.0	10 790.2	12 743.7	84.7	-1.4	0.7	-3.1	3.1	373.8	-6.3
BD - BMI	737.8	909.8	1 189.5	76.5	-16.9	-13.3	-16.8	3.0	7.5	-24.7
CV - CARGOLUX	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	385.4	-17.2
CY - CYPRUS AIRWAYS	166.2	328.2	422.6	77.7	-10.6	-9.4	-7.2	-1.9	3.0	-22.9
FI - ICELANDAIR	190.0	497.1	600.2	82.8	-3.5	-6.1	-8.0	1.6	0.0	0.0
IB - IBERIA	1 994.0	4 720.8	5 570.0	84.8	-4.5	-3.4	-3.6	0.2	76.6	-15.9
JP - ADRIA AIRWAYS	96.0	91.4	142.1	64.3	-12.6	-13.2	-6.9	-4.7	0.1	-21.6
JU - JAT AIRWAYS	118.3	121.3	181.8	66.7	-15.9	-13.1	-9.1	-3.1	0.1	-43.1
KL - KLM ROYAL DUTCH AIRLINES	2 145.8	7 009.0	8 026.5	87.3	-4.6	-3.5	-3.6	0.1	357.3	-12.1
KM - AIR MALTA	177.0	263.9	376.9	70.0	0.6	-1.3	8.4	-6.9	0.6	25.8
LG - LUXAIR	71.3	49.5	73.5	67.3	-4.3	0.7	-1.0	1.2	0.0	50.0
LH - DEUTSCHE LUFTHANSA AG	4 981.9	12 039.5	14 486.2	83.1	0.5	0.6	-0.2	0.7	590.0	-14.9
LO - LOT POLISH AIRLINES	366.8	746.1	930.7	80.2	-5.8	-7.0	-7.6	0.5	4.7	-27.9
LX - SWISS INTERNATIONAL AIRLINES	1 249.5	2 544.1	2 945.0	86.4	0.4	-4.5	-4.8	0.3	85.3	-23.3
MA - MALEV HUNGARIAN AIRLINES	346.8	390.2	496.6	78.6	4.4	-19.8	-24.8	4.9	0.4	-78.8
OA - OLYMPIC AIRLINES	526.6	638.3	904.5	70.6	-5.8	-12.3	1.5	-11.1	3.1	-52.9
OK - CZECH AIRLINES	473.9	652.1	895.1	72.9	0.7	3.3	-0.3	2.5	1.9	-17.0
OS - AUSTRIAN	800.3	1 430.7	1 819.7	78.6	-5.0	-9.0	-9.7	0.5	32.1	-19.8
OU - CROATIA AIRLINES	202.4	145.0	201.3	72.0	-0.6	-1.0	0.8	-1.3	0.2	-15.8
PS - UKRAINE INTERNATIONAL AIRLINES	80.6	139.1	210.7	66.0	-16.4	-14.6	-6.4	-6.3	0.8	18.6
RO - TAROM ROMANIAN AIR TRANSPORT	159.2	203.3	318.2	63.9	-8.0	-7.2	0.3	-5.2	0.3	-46.0
SK - SAS SCANDINAVIAN AIRLINES	1 694.3	2 219.2	2 627.8	84.5	-16.1	-15.3	-19.0	3.7	20.9	-50.7
SN - BRUSSELS AIRLINES	464.7	730.4	980.4	74.5	-3.0	-2.6	-6.2	2.7	5.9	7.1
TK - TURKISH AIRLINES	2 450.4	3 920.2	5 202.6	75.4	12.9	19.9	25.0	-3.2	59.1	24.0
TP - TAP PORTUGAL	880.0	2 223.1	3 033.3	73.3	-0.4	-0.3	2.1	-1.8	25.0	-18.5
VS - VIRGIN ATLANTIC AIRWAYS	496.7	3 586.1	4 467.8	80.3	-0.9	-0.3	-2.1	1.4	113.1	-9.7
VV - AEROSVIT	149.7	367.9	467.7	78.6	-17.9	-3.4	-14.8	9.3	3.3	-21.2
AEA	31 617.6	73 434.5	89 799.7	81.8	-3.6	-2.3	-3.2	0.7	2 633.0	-16.8

Passenger traffic is measured in Passengers boarded, RPK (Revenue Passenger-Kms) and capacity in ASK (Available Seat-Kms).

Freight traffic is measured in TFTK (Total Freight Tonne-Kms) on passenger and all-cargo services, excluding mail.

Growth rates have been adjusted for changes in membership.

* Estimated Data

08/09/2009

Traffic Update



TOTAL SCHEDULED
Scheduled Services by Airline

JANUARY - JULY 2009

AIRLINE	PASSENGER DATA								FREIGHT DATA	
	Passengers boarded (000)	Traffic RPK (mill)	Capacity ASK (mill)	Load Factor %	Change to Previous Year				Traffic TFTK (mill)	TFTK %
					Pax %	Traffic %	Capacity %	PLF Pts		
AF - AIR FRANCE	27 850.9	72 848.3	93 848.8	77.6	-6.2	-5.2	-3.6	-1.3	2 743.1	-22.2
AY - FINNAIR	3 582.9	8 898.9	12 412.0	71.7	-8.3	-7.0	-9.4	1.9	253.3	-21.4
AZ - ALITALIA	11 928.8	15 145.4	24 724.5	61.3	0.0	0.0	0.0	0.0	172.7	0.0
BA - BRITISH AIRWAYS PLC	18 723.4	64 806.3	84 486.4	76.7	-5.0	-3.8	-3.6	-0.1	2 445.5	-12.6
BD - BMI	4 378.2	5 042.0	7 357.7	68.5	-20.4	-15.6	-20.9	4.3	46.2	-36.2
CV - CARGOLUX	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2 655.7	-14.1
CY - CYPRUS AIRWAYS	878.5	1 715.9	2 526.4	67.9	-8.7	-8.5	-7.6	-0.7	10.5	-65.1
FI - ICELANDAIR	716.7	1 851.2	2 532.5	73.1	-15.1	-17.1	-15.3	-1.6	0.0	0.0
IB - IBERIA	12 181.2	29 193.6	36 583.8	79.8	-12.2	-6.6	-6.0	-0.5	472.7	-24.1
JP - ADRIA AIRWAYS	541.1	497.4	854.8	58.2	-17.0	-15.5	-6.3	-6.3	0.9	-19.8
JU - JAT AIRWAYS	540.9	557.5	997.4	55.9	-19.0	-17.0	-10.9	-4.1	1.2	-41.8
KL - KLM ROYAL DUTCH AIRLINES	12 803.2	41 844.9	52 265.3	80.1	-6.6	-5.7	-3.9	-1.5	2 354.3	-16.3
KM - AIR MALTA	825.0	1 237.4	1 897.5	65.2	-5.6	-6.9	3.6	-7.4	4.2	-11.2
LG - LUXAIR	422.8	266.3	446.7	59.6	-8.7	-5.9	-5.0	-0.6	0.0	-25.0
LH - DEUTSCHE LUFTHANSA AG	30 485.5	69 903.7	91 436.0	76.5	-5.3	-5.3	-2.1	-2.6	3 720.0	-23.6
LO - LOT POLISH AIRLINES	2 042.3	3 385.2	4 873.4	69.5	-13.7	-14.4	-10.5	-3.2	30.6	-39.6
LX - SWISS INTERNATIONAL AIRLINES	7 692.1	15 558.7	20 094.6	77.4	0.9	-2.8	0.3	-2.5	614.7	-18.1
MA - MALEV HUNGARIAN AIRLINES	1 720.0	1 879.0	2 996.6	62.7	-1.1	-18.7	-17.1	-1.2	2.1	-71.0
OA - OLYMPIC AIRLINES	2 651.8	3 072.3	5 610.8	54.8	-12.9	-18.3	-1.8	-11.1	24.7	-43.3
OK - CZECH AIRLINES	2 555.1	3 154.1	5 124.2	61.6	-7.8	-7.5	-4.1	-2.2	13.5	-14.6
OS - AUSTRIAN	4 785.1	8 293.8	11 587.0	71.6	-11.0	-13.9	-10.8	-2.6	190.8	-27.0
OU - CROATIA AIRLINES	961.5	644.4	1 092.5	59.0	-3.9	-5.6	2.2	-4.9	1.2	-14.0
PS - UKRAINE INTERNATIONAL AIRLINES	430.2	740.4	1 322.8	56.0	-17.2	-17.5	-0.5	-11.5	5.3	30.9
RO - TAROM ROMANIAN AIR TRANSPORT	862.9	1 020.2	1 955.0	52.2	-13.1	-15.6	0.9	-10.2	2.0	-42.3
SK - SAS SCANDINAVIAN AIRLINES	12 532.9	13 851.2	19 521.8	71.0	-17.7	-17.5	-14.7	-2.4	169.5	-45.3
SN - BRUSSELS AIRLINES	2 698.6	3 915.7	6 319.4	62.0	-13.3	-11.0	-9.3	-1.2	51.7	-9.9
TK - TURKISH AIRLINES	13 507.8	20 867.0	29 944.0	69.7	11.1	14.8	21.9	-4.3	348.6	23.4
TP - TAP PORTUGAL	4 734.1	11 586.1	17 587.2	65.9	-5.2	-6.5	-6.0	-0.3	155.3	-24.2
VS - VIRGIN ATLANTIC AIRWAYS	3 129.9	22 801.4	29 757.4	76.6	-5.1	-4.6	-5.1	0.4	725.7	-19.3
VV - AEROSVIT	784.6	1 942.7	2 835.3	68.5	-22.0	-12.8	-14.1	1.0	17.1	-29.9
AEA	187 752.1	427 423.0	574 450.8	74.4	-8.2	-6.4	-4.4	-1.6	17 241.9	-21.3

Passenger traffic is measured in Passengers boarded, RPK (Revenue Passenger-Kms) and capacity in ASK (Available Seat-Kms).

Freight traffic is measured in TFTK (Total Freight Tonne-Kms) on passenger and all-cargo services, excluding mail.

Growth rates have been adjusted for changes in membership.

* Estimated Data

08/09/2009