

Traffic Update

17 February 2009

EUROPEAN AIRLINES – FEWER PASSENGERS BUT MORE PASSENGER-KM IN 2008

Industry ‘not yet at the bottom of the cycle’ says AEA

Members of the Association of European Airlines, which represents Europe’s major network airlines, boarded almost 366 million passengers in 2008, 5.4 million fewer than in 2007. However, as AEA points out, the decrease was triggered by a restructuring in some Domestic markets. Using the standard industry measure of passenger-kilometres, traffic registered a small increase, of 1.2%.

“We have seen figures as weak as these on only three occasions in the last 25 years”, said AEA Secretary General Ulrich Schulte-Strathaus: “in 1986, when Chernobyl and the US bombing of Libya caused major disruptions in travel patterns, in 1991 when the first Gulf War had a similar effect, and in 2001-2002 following the 9/11 attacks. This time the upheavals are economic, and likely to be more powerful and longer-lasting than the external shocks of the past”.

The AEA December figures gave an indication of just how much the market has weakened. Passenger traffic was 3.5% down on December 2007, with every route area showing a decrease except Europe-Middle East which posted a plus 6.3%. Cargo traffic showed a catastrophic decline of 21.4%, by far the steepest on record.

“We have no reason to suppose that we are at, or even approaching, the bottom of the cycle”, said Mr Schulte-Strathaus. He pointed to a remarkable development in the capacity figures: “Nineteen of our member airlines reduced seat capacity in December, eight of them by more than 10% – yet, overall, the traffic decline was still greater than the capacity cutbacks”.

While conditions in the industry were severe, said Ulrich Schulte-Strathaus, the airlines were not looking for handouts. *“We are not jumping on the bail-out bandwagon”, he said. “We are working closely with our regulators to identify ways in which pressures on the industry can be relieved. We cannot afford to take on any further cost burdens arising from ill-considered legislation, and we desperately need the benefits of the Single European Sky programme to begin to flow”.*

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- 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

DECEMBER 2008

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)	6 650.7	3 742.8	5 939.2	63.0	-17.4	-16.0	-13.5	-1.9	8.1	-18.4
Cross-border Europe (2)	11 434.7	12 127.1	19 336.7	62.7	-5.5	-4.6	-4.1	-0.3	53.0	-21.3
Total Europe (1+2)	18 085.3	15 869.9	25 275.8	62.8	-10.2	-7.6	-6.5	-0.7	61.1	-20.9
Europe - North Africa (3)	379.8	705.4	1 050.1	67.2	2.5	-4.1	-8.1	2.8	20.1	7.0
Europe - Middle East (4)	710.9	2 369.9	3 378.7	70.1	12.8	6.3	5.7	0.4	71.2	-15.3
Intl Short/Medium Haul (2+3+4)	12 525.4	15 202.4	23 765.4	64.0	-4.4	-3.0	-3.0	0.0	144.3	-15.2
North Atlantic (5)	2 079.7	14 359.2	17 631.7	81.4	-3.9	-2.7	-3.0	0.3	729.5	-17.3
Mid Atlantic (6)	564.6	4 229.3	5 306.0	79.7	-1.9	-0.9	1.3	-1.7	115.0	-15.1
South Atlantic (7)	496.5	4 423.8	5 587.4	79.2	-0.4	-0.1	1.8	-1.5	194.5	-25.2
Europe - Sub Saharan Africa (8)	751.3	5 018.6	6 601.0	76.0	-0.3	-0.6	0.8	-1.1	277.3	-7.3
Europe - Far East/Australasia (9)	1 438.0	11 757.9	15 200.4	77.4	-4.4	-3.7	-3.0	-0.6	1 091.6	-27.3
Total Longhaul (5 to 9^x)	5 352.3	39 836.8	50 399.4	79.0	-3.1	-2.3	-1.6	-0.6	2 408.1	-21.8
Total International (2 to 9^x)	17 877.6	55 039.2	74 164.7	74.2	-4.0	-2.5	-2.1	-0.3	2 552.4	-21.4
Total Scheduled (1 to 9^x)	24 528.3	58 782.0	80 103.9	73.4	-8.0	-3.5	-3.0	-0.4	2 560.5	-21.4

JANUARY - DECEMBER 2008

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)	102 664.6	56 760.3	85 785.1	66.2	-7.8	-7.4	-4.6	-2.0	108.6	-7.3
Cross-border Europe (2)	170 607.6	184 714.4	269 007.7	68.7	0.6	2.1	3.4	-0.9	723.3	-10.0
Total Europe (1+2)	273 272.2	241 474.5	354 792.8	68.1	-2.7	-0.3	1.4	-1.2	831.9	-9.6
Europe - North Africa (3)	4 638.6	9 127.4	12 932.3	70.6	4.9	6.6	3.4	2.1	183.8	-3.9
Europe - Middle East (4)	8 636.1	28 726.8	39 024.6	73.6	11.5	8.2	9.4	-0.8	999.6	1.0
Intl Short/Medium Haul (2+3+4)	183 890.4	222 597.5	321 010.7	69.3	1.2	3.0	4.1	-0.7	1 907.1	-3.9
North Atlantic (5)	28 991.3	199 212.5	244 799.9	81.4	-0.6	0.0	1.0	-0.8	10 485.9	-2.3
Mid Atlantic (6)	6 831.8	51 469.2	61 931.8	83.1	3.6	2.8	3.9	-0.9	1 454.6	-3.3
South Atlantic (7)	5 842.6	51 782.4	63 826.4	81.1	6.1	7.5	12.9	-4.1	2 705.9	2.7
Europe - Sub Saharan Africa (8)	8 382.6	55 405.1	71 881.1	77.1	3.6	2.9	4.7	-1.4	3 403.8	0.5
Europe - Far East/Australasia (9)	18 838.1	153 767.9	191 073.1	80.5	1.1	0.6	3.3	-2.1	16 572.7	-4.3
Total Longhaul (5 to 9^x)	69 192.8	512 420.7	634 736.4	80.7	1.4	1.5	3.5	-1.6	34 624.3	-2.7
Total International (2 to 9^x)	253 083.2	735 018.2	955 747.0	76.9	1.2	2.0	3.7	-1.3	36 531.5	-2.8
Total Scheduled (1 to 9^x)	355 747.8	791 778.2	1 041 532.2	76.0	-1.5	1.2	3.0	-1.3	36 640.1	-2.8

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

DECEMBER 2008

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	3 873.0	10 286.0	13 399.8	76.8	-0.6	0.3	-1.2	1.2	422.6	-23.0
AP - AIR ONE	547.2	302.6	519.3	58.3	0.1	-1.7	-7.5	3.4		
AY - FINNAIR	499.3	1 274.2	1 772.8	71.9	-2.2	4.9	0.5	3.0	34.0	-25.2
AZ - ALITALIA	632.0	1 510.1	2 535.6	59.6	-63.9	-46.2	-38.0	-9.1	44.9	-68.7
BA - BRITISH AIRWAYS PLC	2 509.5	9 169.9	11 943.6	76.8	-4.6	-3.5	-3.3	-0.1	344.1	-14.6
BD - BMI	579.7	665.8	1 020.4	65.2	-14.7	-7.1	-21.2	9.9	7.7	-22.2
CV - CARGOLUX									386.2	-19.1
CY - CYPRUS AIRWAYS	117.1	217.8	334.3	65.1	-6.9	-7.1	-5.5	-1.1		-100.0
FI - ICELANDAIR	69.6	181.3	267.2	67.9	-25.5	-28.4	-25.8	-2.5		
IB - IBERIA	1 563.3	3 958.5	5 200.9	76.1	-18.8	-7.0	-5.7	-1.0	83.4	-23.1
JK - SPANAIR	436.5	438.9	702.7	62.5	-27.3	-27.1	-28.1	0.9		
JP - ADRIA AIRWAYS	67.4	61.6	110.9	55.6	-1.3	-0.4	4.7	-2.9	0.2	-12.6
JU - JAT AIRWAYS	70.5	75.0	129.7	57.8	-10.5	-6.6	-12.1	3.4	0.3	-9.5
KL - KLM ROYAL DUTCH AIRLINES	1 784.5	6 086.1	7 701.9	79.0	2.5	3.8	4.8	-0.7	350.1	-17.1
KM - AIR MALTA	79.3	106.6	175.8	60.6	7.7	1.6	1.0	0.4	0.6	-9.8
LG - LUXAIR	56.2	33.6	62.5	53.8	-1.6	0.1	8.0	-4.2		-100.0
LH - DEUTSCHE LUFTHANSA AG	3 796.7	9 019.4	11 896.1	75.8	-4.0	-1.3	0.1	-1.1	542.1	-21.4
LO - LOT POLISH AIRLINES	251.7	402.7	603.6	66.7	-15.6	-14.4	-9.3	-4.0	4.1	-36.3
LX - SWISS INTERNATIONAL AIRLINES	1 051.9	2 257.1	2 956.4	76.3	6.4	4.0	6.5	-1.8	94.0	-14.5
MA - MALEV HUNGARIAN AIRLINES	194.0	214.4	362.2	59.2	3.2	-11.1	-15.8	3.1	0.2	-77.4
OA - OLYMPIC AIRLINES	340.2	451.3	738.9	61.1	-19.9	-16.1	-10.3	-4.2	4.1	-34.5
OK - CZECH AIRLINES	310.6	376.6	651.5	57.8	-6.8	-14.4	-10.0	-3.0	2.2	-23.2
OS - AUSTRIAN	627.2	1 125.8	1 605.0	70.1	-6.5	-6.5	-6.7	0.2	24.7	-24.7
OU - CROATIA AIRLINES	113.3	68.8	125.1	55.0	8.3	8.7	10.8	-1.1	0.2	-7.3
PS - UKRAINE INTERNATIONAL AIRLINES	62.0	110.4	201.5	54.8	1.2	0.3	17.9	-9.6	1.0	32.9
RO - TAROM ROMANIAN AIR TRANSPORT	115.9	139.1	256.0	54.3	-14.5	-18.0	-6.9	-7.4	0.4	-36.9
SK - SAS SCANDINAVIAN AIRLINES	1 539.1	1 641.2	2 482.9	66.1	-9.4	-9.4	-5.0	-3.2	31.4	-17.5
SN - BRUSSELS AIRLINES	322.5	491.3	810.5	60.6	-12.8	-10.2	-8.0	-1.5	8.1	26.1
TK - TURKISH AIRLINES	1 676.2	2 600.3	3 697.7	70.3	16.9	17.2	16.3	0.5	39.6	-7.1
TP - TAP PORTUGAL	652.3	1 723.0	2 779.6	62.0	5.2	5.3	7.3	-1.2	21.7	-17.3
VS - VIRGIN ATLANTIC AIRWAYS	483.7	3 532.8	4 637.3	76.2	-1.3	-0.9	0.6	-1.1	112.7	-13.3
VV - AEROSVIT	106.1	259.9	422.4	61.5	-15.0	-13.4	-8.3	-3.7		
AEA	24 528.3	58 782.0	80 103.9	73.4	-8.0	-3.5	-3.0	-0.4	2 560.5	-21.4

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

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* Estimated Data

05/02/2009

Traffic Update



TOTAL SCHEDULED
Scheduled Services by Airline

JANUARY - DECEMBER 2008

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	49 975.1	129 712.2	166 569.4	77.9	0.1	2.6	3.6	-0.8	5 830.9	-5.1
AP - AIR ONE	7 404.1	4 229.2	7 245.7	58.4	4.4	3.6	2.0	0.9		
AY - FINNAIR	6 883.8	16 983.9	23 549.7	72.1	-1.1	9.7	11.7	-1.4	542.6	10.9
AZ - ALITALIA	18 048.0	29 205.5	42 629.3	68.5	-26.1	-23.3	-16.7	-5.9	1 198.7	-27.6
BA - BRITISH AIRWAYS PLC	33 652.1	115 733.6	149 513.4	77.4	-3.4	-2.2	-0.1	-1.6	4 699.9	1.6
BD - BMI	9 301.6	10 377.5	15 522.9	66.9	0.0	21.8	24.5	-1.5	120.6	24.6
CV - CARGOLUX									5 324.3	-2.9
CY - CYPRUS AIRWAYS	1 710.8	3 329.5	4 707.7	70.7	0.6	-1.6	0.4	-1.5	19.2	-56.4
FI - ICELANDAIR	1 416.7	3 736.5	5 010.6	74.6	-11.2	-12.9	-12.0	-0.8		
IB - IBERIA	22 833.5	52 843.0	66 039.1	80.0	-13.3	-2.5	-0.6	-1.6	1 056.9	-5.8
JK - SPANAIR	8 793.7	8 900.3	12 894.5	69.0	-10.4	-6.7	-6.8	0.0		
JP - ADRIA AIRWAYS	1 103.7	1 002.7	1 585.5	63.2	16.7	16.1	18.2	-1.1	1.9	-47.0
JU - JAT AIRWAYS	1 157.8	1 175.9	1 905.1	61.7	3.0	2.8	-2.6	3.3	3.5	-10.9
KL - KLM ROYAL DUTCH AIRLINES	23 844.1	77 529.5	94 368.5	82.2	2.8	4.2	6.1	-1.5	4 786.9	-2.2
KM - AIR MALTA	1 538.9	2 302.4	3 144.7	73.2	7.7	2.3	-4.1	4.6	8.3	-3.7
LG - LUXAIR	802.6	496.0	812.8	61.0	3.7	7.0	7.6	-0.3	0.0	-70.1
LH - DEUTSCHE LUFTHANSA AG	54 664.1	126 266.6	160 269.0	78.8	0.9	3.4	4.9	-1.2	8 176.1	-2.0
LO - LOT POLISH AIRLINES	3 966.7	6 710.6	9 208.8	72.9	-7.1	-7.9	-4.3	-2.9	78.9	-5.1
LX - SWISS INTERNATIONAL AIRLINES	13 319.8	28 141.4	35 032.8	80.3	10.4	12.1	12.0	0.1	1 247.6	7.2
MA - MALEV HUNGARIAN AIRLINES	3 122.9	4 079.7	5 972.3	68.3	-0.3	-8.0	-8.0	0.0	11.0	-57.5
OA - OLYMPIC AIRLINES	5 268.3	6 609.9	9 783.1	67.6	-11.2	-8.6	-8.9	0.3	69.1	5.0
OK - CZECH AIRLINES	4 769.1	5 940.4	9 209.9	64.5	1.9	-1.8	0.6	-1.6	27.3	-17.1
OS - AUSTRIAN	9 140.7	16 464.5	22 130.7	74.4	-0.1	-5.5	-4.6	-0.7	420.8	-9.7
OU - CROATIA AIRLINES	1 777.4	1 216.6	1 879.3	64.7	13.6	12.2	12.2	0.0	2.3	4.8
PS - UKRAINE INTERNATIONAL AIRLINES	920.1	1 591.2	2 386.0	66.7	11.1	12.3	6.9	3.2	7.8	12.4
RO - TAROM ROMANIAN AIR TRANSPORT	1 778.9	2 156.6	3 489.4	61.8	5.0	4.5	13.7	-5.4	6.2	11.7
SK - SAS SCANDINAVIAN AIRLINES	25 355.1	27 889.8	38 775.7	71.9	-0.2	2.1	5.2	-2.2	519.4	-4.9
SN - BRUSSELS AIRLINES	5 106.7	7 364.7	11 650.7	63.2	-0.1	2.8	9.6	-4.2	94.8	18.2
TK - TURKISH AIRLINES	21 870.4	32 824.9	43 976.0	74.6	15.6	13.9	11.6	1.5	533.0	9.7
TP - TAP PORTUGAL	8 737.2	21 906.3	32 700.1	67.0	12.3	14.5	21.2	-3.9	330.4	5.7
VS - VIRGIN ATLANTIC AIRWAYS	5 685.4	41 173.6	53 693.7	76.7	1.1	1.5	1.2	0.2	1 521.5	2.1
VV - AEROSVIT	1 798.3	3 883.8	5 875.7	66.1	16.5	8.6	15.8	-4.4		
AEA	355 747.8	791 778.2	1 041 532.2	76.0	-1.5	1.2	3.0	-1.3	36 640.1	-2.8

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