

Traffic Update

15 June 2009

EUROPEAN AIRLINE TRAFFIC IN APRIL, PRELIMINARY RESULTS FOR MAY May could be the worst month so far

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

Passenger traffic in April was 2.4% down on the same month last year, compared with -9.1% in March and -5.5% (adjusted for the 2008 leap year) in February. While at first sight a distinct improvement, AEA warned that the shift of the Easter traffic peak from March 2008 to April 2009 distorted the growth rates in each of these months.

Said AEA Secretary General Ulrich Schulte-Strathaus: *"The four months reported so far are pieces of a jigsaw which, put together, reveal a 6% drop in traffic compared to the first four months of last year. But our three major markets – Europe, the North Atlantic and the Far East – all face far steeper traffic declines than the average"*.

However, warned Mr Schulte-Strathaus, *"the next piece in the jigsaw will reveal an even worse scenario"*. AEA's weekly figures for the last four weeks of May and the first week of June are relentlessly poor, with May likely to produce a decrease in the order of 9%.

A positive recent development has been an increase in the tempo of capacity reduction. In April, seat-km offered was 2.8% down on last year, whereas the preliminary May figure is -5.3% - although still substantially below the traffic decrease. Said Mr Schulte-Strathaus: *"The recent EU decision to temporarily suspend the 'use-it-or-lose-it' rule for the allocation of airport slots is clearly having an effect, as airlines are able to adjust their capacity in response to market conditions without the risk of jeopardising the long-term integrity of their product"*.

While the capacity adjustment was not yet in line with the unprecedented drop in demand, he said, it was nevertheless contributing to a cost reduction in the face of severely depressed revenues. *"However, the Summer slot waiver will expire long before the business picks up; the Winter programme is being fine-tuned now, and now is the time that the airlines need reassurance that they can continue to tailor production to demand – an extension of the slot waiver for an extra timetable season is essential"*.

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Traffic Update



Scheduled Services of AEA Member Airlines

APRIL 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)	6 303.7	3 390.8	4 916.7	69.0	-11.6	-8.4	-10.3	1.4	7.0	-25.3
Cross-border Europe (2)	13 486.8	14 739.0	21 001.9	70.2	-3.5	-0.8	-3.0	1.5	51.5	-22.2
Total Europe (1+2)	19 790.5	18 129.8	25 918.7	69.9	-6.2	-2.3	-4.5	1.5	58.6	-22.6
Europe - North Africa (3)	358.5	747.6	1 032.3	72.4	10.9	12.6	14.8	-1.5	18.1	19.2
Europe - Middle East (4)	790.9	2 650.3	3 484.4	76.1	15.9	15.1	17.6	-1.7	86.9	6.3
Intl Short/Medium Haul (2+3+4)	14 820.3	18 136.8	25 518.7	71.1	-1.1	1.7	0.0	1.2	156.5	-4.0
North Atlantic (5)	2 180.1	14 958.9	18 288.5	81.8	-3.9	-4.2	-6.4	1.9	665.3	-24.6
Mid Atlantic (6)	554.6	4 136.3	4 970.4	83.2	-2.4	-3.0	-3.2	0.2	111.8	-11.0
South Atlantic (7)	386.7	3 390.9	4 467.1	75.9	-1.9	-2.6	-3.3	0.6	161.3	-28.7
Europe - Sub Saharan Africa (8)	666.3	4 366.7	5 657.6	77.2	5.5	3.9	3.2	0.5	246.0	-14.4
Europe - Far East/Australasia (9)	1 422.6	11 671.3	14 791.8	78.9	-6.4	-6.0	-2.2	-3.2	1 017.6	-25.9
Total Longhaul (5 to 9^x)	5 232.3	38 550.0	48 218.6	79.9	-3.1	-3.6	-3.5	-0.1	2 202.0	-23.9
Total International (2 to 9^x)	19 868.5	56 686.8	73 737.3	76.9	-2.5	-2.0	-2.3	0.2	2 358.5	-22.9
Total Scheduled (1 to 9^x)	26 172.2	60 077.7	78 654.0	76.4	-4.9	-2.4	-2.8	0.4	2 365.6	-22.9

JANUARY - APRIL 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)	22 956.7	12 175.5	19 102.7	63.7	-12.4	-11.2	-8.6	-1.8	28.1	-21.0
Cross-border Europe (2)	45 280.5	48 126.6	76 312.0	63.1	-8.0	-6.6	-3.8	-1.9	209.0	-17.0
Total Europe (1+2)	68 237.3	60 302.0	95 414.7	63.2	-9.5	-7.6	-4.8	-1.9	237.1	-17.5
Europe - North Africa (3)	1 198.2	2 512.7	3 692.9	68.0	-0.4	0.4	-0.2	0.4	73.3	18.7
Europe - Middle East (4)	2 602.6	9 051.3	13 052.2	69.3	5.9	4.7	8.8	-2.7	326.4	-4.2
Intl Short/Medium Haul (2+3+4)	49 715.6	59 690.5	93 057.2	64.1	-6.0	-4.8	-2.1	-1.8	608.8	-7.0
North Atlantic (5)	7 335.2	50 472.1	66 577.9	75.8	-8.2	-8.1	-6.0	-1.8	2 753.9	-19.0
Mid Atlantic (6)	2 219.8	16 637.4	20 143.8	82.6	-4.8	-4.7	-1.4	-2.8	437.1	-11.9
South Atlantic (7)	1 697.7	15 050.9	19 193.1	78.4	-5.6	-5.0	-3.3	-1.3	658.1	-26.7
Europe - Sub Saharan Africa (8)	2 778.1	18 590.8	24 184.5	76.9	2.1	0.2	-0.2	0.3	1 021.6	-9.4
Europe - Far East/Australasia (9)	5 728.9	46 390.2	58 962.5	78.7	-6.4	-6.7	-3.1	-3.0	3 930.9	-25.2
Total Longhaul (5 to 9^x)	19 833.4	147 270.8	189 279.4	77.8	-5.8	-6.0	-3.7	-1.9	8 801.8	-21.3
Total International (2 to 9^x)	68 914.7	206 961.3	282 336.5	73.3	-6.8	-5.7	-3.1	-2.0	9 410.5	-20.5
Total Scheduled (1 to 9^x)	91 871.4	219 136.8	301 439.2	72.7	-8.2	-6.0	-3.5	-1.9	9 438.6	-20.5

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

APRIL 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	4 185.4	10 661.0	13 481.1	79.1	-2.8	-1.9	-2.0	0.0	390.5	-24.7
AP - AIR ONE										
AY - FINNAIR	517.4	1 221.2	1 710.5	71.4	-12.7	-6.0	-9.5	2.7	35.5	-22.2
AZ - ALITALIA										
BA - BRITISH AIRWAYS PLC	2 748.8	9 319.9	11 916.9	78.2	1.0	0.5	-3.0	2.7	337.8	-15.2
BD - BMI	639.4	764.1	1 092.2	70.0	-21.7	-14.8	-17.2	2.0	10.0	-7.2
CV - CARGOLUX									383.7	-14.7
CY - CYPRUS AIRWAYS	149.0	290.7	414.8	70.1	-2.2	-3.9	-3.2	-0.5		-100.0
FI - ICELANDAIR	88.2	223.4	321.8	69.4	-9.9	-11.9	-8.3	-2.8		
IB - IBERIA	1 885.7	4 346.0	5 258.6	82.6	-4.0	2.4	-2.9	4.2	61.0	-32.6
JP - ADRIA AIRWAYS	77.6	71.6	121.6	58.9	-21.3	-17.0	-13.0	-2.9	0.1	-16.9
JU - JAT AIRWAYS	73.0	76.1	135.6	56.1	-17.5	-14.2	-12.9	-0.9	0.2	-50.2
KL - KLM ROYAL DUTCH AIRLINES	1 933.7	6 104.9	7 397.8	82.5	-3.8	-3.8	-5.2	1.2	323.1	-20.2
KM - AIR MALTA	128.3	185.4	292.8	63.3	2.3	-1.4	13.6	-9.6	0.5	-37.9
LG - LUXAIR	64.9	42.4	65.6	64.6	-9.2	-3.7	-9.7	4.0	0.0	
LH - DEUTSCHE LUFTHANSA AG	4 530.2	9 980.7	13 206.7	75.6	-6.4	-5.3	-2.2	-2.4	495.3	-30.7
LO - LOT POLISH AIRLINES	293.0	452.5	666.3	67.9	-12.3	-12.3	-8.2	-3.2	4.0	-52.0
LX - SWISS INTERNATIONAL AIRLINES	1 145.8	2 270.4	2 920.6	77.7	2.0	0.4	4.8	-3.4	84.7	-20.5
MA - MALEV HUNGARIAN AIRLINES	269.2	295.6	482.2	61.3	8.8	3.3	1.0	1.4	0.3	-56.3
OA - OLYMPIC AIRLINES	426.0	485.3	827.8	58.6	-2.2	-4.2	1.6	-3.5	3.5	-45.5
OK - CZECH AIRLINES	395.1	472.3	742.4	63.6	-4.0	-1.3	-2.0	0.5	1.8	-23.7
OS - AUSTRIAN	714.0	1 246.2	1 668.4	74.7	-10.2	-8.7	-7.5	-0.9	26.3	-27.6
OU - CROATIA AIRLINES	129.0	84.6	155.1	54.5	-1.0	-3.9	-0.6	-1.9	0.2	-8.5
PS - UKRAINE INTERNATIONAL AIRLINES	56.8	96.3	181.4	53.1	-20.3	-22.8	-2.4	-14.0	0.8	35.8
RO - TAROM ROMANIAN AIR TRANSPORT	124.7	147.1	276.6	53.2	-11.7	-13.5	-0.6	-7.9	0.3	-45.7
SK - SAS SCANDINAVIAN AIRLINES	1 864.4	2 066.9	2 817.7	73.4	-22.9	-19.4	-21.6	2.0	19.5	-59.2
SN - BRUSSELS AIRLINES	427.4	612.5	943.0	64.9	-10.7	-5.4	-6.8	1.0	7.0	-20.2
TK - TURKISH AIRLINES	1 959.1	3 047.5	4 328.0	70.4	14.0	17.9	24.5	-3.9	51.6	17.1
TP - TAP PORTUGAL	759.9	1 742.2	2 525.6	69.0	8.3	4.9	-3.7	5.7	23.3	-25.8
VS - VIRGIN ATLANTIC AIRWAYS	484.7	3 519.5	4 314.5	81.6	-1.9	-1.0	-2.7	1.4	101.1	-21.3
VV - AEROSVIT	101.5	251.6	388.3	64.8	-21.7	-13.6	-9.1	-3.4	3.6	-27.6
AEA	26 172.2	60 077.7	78 654.0	76.4	-4.9	-2.4	-2.8	0.4	2 365.6	-22.9

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

02/06/2009

Traffic Update



TOTAL SCHEDULED
Scheduled Services by Airline

JANUARY - APRIL 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	14 799.0	39 581.5	52 286.2	75.7	-7.3	-5.4	-3.1	-1.8	1 522.2	-24.0
AP - AIR ONE										
AY - FINNAIR	2 006.0	4 949.2	7 050.3	70.2	-7.1	-5.2	-7.0	1.3	138.6	-21.7
AZ - ALITALIA										
BA - BRITISH AIRWAYS PLC	9 847.9	35 023.7	47 254.6	74.1	-5.3	-4.1	-3.5	-0.5	1 344.7	-15.5
BD - BMI	2 339.2	2 594.0	3 944.7	65.8	-20.5	-15.1	-23.6	6.5	34.9	-12.0
CV - CARGOLUX									1 517.1	-12.3
CY - CYPRUS AIRWAYS	441.1	841.7	1 284.0	65.6	-5.4	-6.0	-8.6	1.8	7.6	-60.5
FI - ICELANDAIR	276.8	701.4	1 034.6	67.8	-22.9	-25.0	-21.5	-3.2		
IB - IBERIA	6 526.7	16 109.2	20 635.3	78.1	-15.7	-6.5	-5.2	-1.1	263.2	-25.4
JP - ADRIA AIRWAYS	268.5	242.0	432.7	55.9	-16.7	-14.8	-7.2	-5.0	0.5	-17.6
JU - JAT AIRWAYS	253.7	265.8	505.9	52.5	-17.1	-15.0	-12.9	-1.3	0.7	-37.5
KL - KLM ROYAL DUTCH AIRLINES	6 834.0	22 762.6	29 097.1	78.2	-5.7	-4.6	-2.6	-1.7	1 293.8	-18.4
KM - AIR MALTA	367.1	545.4	839.8	64.9	-5.5	-5.5	1.0	-4.5	2.3	-12.1
LG - LUXAIR	215.8	126.4	234.1	54.0	-9.6	-9.0	-6.2	-1.7	0.0	-41.7
LH - DEUTSCHE LUFTHANSA AG	16 079.1	36 512.7	48 875.1	74.7	-7.1	-6.6	-3.0	-2.9	1 993.0	-27.4
LO - LOT POLISH AIRLINES	996.7	1 457.1	2 335.3	62.4	-19.3	-20.2	-13.8	-5.0	17.0	-42.1
LX - SWISS INTERNATIONAL AIRLINES	4 059.8	8 492.6	11 420.7	74.4	-0.7	-1.0	3.7	-3.5	350.2	-17.1
MA - MALEV HUNGARIAN AIRLINES	792.3	855.3	1 535.7	55.7	-6.7	-19.8	-14.7	-3.6	1.1	-65.7
OA - OLYMPIC AIRLINES	1 344.1	1 528.6	3 003.4	50.9	-12.4	-16.4	-3.5	-7.8	14.6	-37.9
OK - CZECH AIRLINES	1 245.7	1 463.4	2 607.6	56.1	-9.8	-10.9	-5.6	-3.4	7.9	-12.5
OS - AUSTRIAN	2 477.7	4 358.6	6 251.7	69.7	-13.3	-14.3	-10.5	-3.1	98.0	-30.5
OU - CROATIA AIRLINES	430.2	265.1	520.6	50.9	-2.3	-4.5	6.8	-6.0	0.7	-7.1
PS - UKRAINE INTERNATIONAL AIRLINES	215.7	375.2	736.4	50.9	-16.3	-17.7	3.3	-12.9	3.1	33.8
RO - TAROM ROMANIAN AIR TRANSPORT	437.0	506.0	1 054.6	48.0	-15.1	-18.3	1.9	-11.9	1.1	-38.5
SK - SAS SCANDINAVIAN AIRLINES	6 794.2	7 197.7	10 952.9	65.7	-18.9	-18.5	-12.7	-4.7	101.8	-41.6
SN - BRUSSELS AIRLINES	1 378.8	1 986.0	3 420.7	58.1	-18.1	-14.6	-11.0	-2.5	28.2	-18.3
TK - TURKISH AIRLINES	6 812.9	10 504.5	15 519.4	67.7	11.2	13.1	19.3	-3.7	185.1	26.4
TP - TAP PORTUGAL	2 504.2	6 210.2	9 993.0	62.1	-2.9	-4.5	-2.5	-1.3	85.8	-22.0
VS - VIRGIN ATLANTIC AIRWAYS	1 728.5	12 689.2	17 102.6	74.2	-7.1	-6.5	-3.9	-2.1	418.5	-18.5
VV - AEROSVIT	398.5	991.9	1 510.1	65.7	-20.9	-15.3	-12.7	-2.0	7.0	-29.7
AEA	91 871.4	219 136.8	301 439.2	72.7	-8.2	-6.0	-3.5	-1.9	9 438.6	-20.5

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

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