

Traffic Update

17 November 2009

NO END IN SIGHT TO AIRLINE CRISIS AS LATEST FIGURES SHOW NO SIGNS OF RECOVERY

AEA calls for stakeholder summit to create conditions necessary for recovery

The Association of European Airlines, representing Europe's most important network carriers, is calling on European policy-makers to convene a 'stakeholder summit' to address the challenges facing the European airline sector during the longest and deepest business downturn in its history.

The call comes as latest traffic figures emerging from AEA show no sign of improvement. Even compared to a depressed baseline in late 2008, this year's figures remain locked-in to a trend line about 2% below last year's already dismal figures. The traffic decline pales into insignificance, however, compared to the price effects of the seriously depressed market; latest yield figures show that the average ticket price per kilometre of travel has fallen by more than 15%.

Said AEA Secretary General Ulrich Schulte-Strathaus: *"The foundations for a sustainable European air transport sector are crumbling. Portions of our industry are close to collapse – indeed, we have seen failures among premium carriers, leisure carriers, no-frills and cargo airlines. Some network airlines are ceasing to exist as independent entities. Others are exiting markets that they will not re-enter. Secondary markets are losing service. Tens of thousands of people employed by or sustained by the airlines are losing their jobs"*.

The policy-makers had a choice, said Mr Schulte-Strathaus: watch a weakened and traumatised industry struggle to rebuild within existing constraints, or take proactive steps to construct a regulatory framework within which a return to prosperity could be expedited, and European air transport re-establish itself as a powerful global force. *"The US are a step ahead of us in grasping the severity of the crisis"*, he said. *"Their government has already hosted a stakeholder forum and is setting up a Federal Advisory Committee to discuss the future of the industry"*.

Turning to the latest traffic figures, Mr Schulte-Strathaus said: *"The AEA airlines, collectively, have failed to make a profit in the summer, leaving them ill-prepared to face what will be a heavily unprofitable winter. Decision-makers must realise that a key European resource is under threat and steps must be taken – now – to act positively and decisively to create the conditions under which prosperity can be*

- 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

restored as quickly as possible. I invite the European Commission to follow the example of their US counterparts and put in place a structured dialogue with stakeholders, to create the policy which will safeguard the benefits that aviation brings to Europe's citizens and businesses".

For further information, please contact:

David Henderson

Manager Information

Phone : +32(0) 2 639 89 72

Email: david.henderson@aea.be

www.aea.be

Note to the Editor: The Association of European Airlines (AEA) brings together 33 European established scheduled network carriers. These collectively carry 366 million passengers and 7 million tonnes of cargo each year, operating 2,617 aircraft serving 662 destinations in 162 countries with 11,585 flights a day. They provide around 394,200 jobs directly, and generate a total turnover of €79 billion

Traffic Update

Scheduled Services of AEA Member Airlines

SEPTEMBER 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)	7 882.2	4 204.7	6 267.2	67.1	-5.3	-3.5	-5.0	1.1	7.1	-9.0
Cross-border Europe (2)	14 828.8	16 290.4	22 108.4	73.7	-5.4	-4.8	-6.2	1.1	54.7	-11.2
Total Europe (1+2)	22 711.0	20 495.1	28 375.5	72.2	-5.3	-4.5	-6.0	1.1	61.8	-11.0
Europe - North Africa (3)	369.6	737.2	1 157.3	63.7	12.2	13.0	14.0	-0.6	15.0	20.2
Europe - Middle East (4)	792.6	2 471.2	3 668.2	67.4	10.6	9.2	15.2	-3.7	97.6	21.1
Intl Short/Medium Haul (2+3+4)	16 199.2	19 498.7	26 933.8	72.4	-3.1	-2.6	-3.0	0.3	167.4	8.1
North Atlantic (5)	2 557.3	17 556.9	20 307.0	86.5	-3.6	-3.6	-8.4	4.4	747.9	-11.1
Mid Atlantic (6)	449.1	3 509.7	4 441.2	79.0	-9.4	-7.1	-6.7	-0.3	115.4	4.0
South Atlantic (7)	473.3	4 277.6	5 053.9	84.6	-7.5	-5.6	-3.8	-1.6	191.3	-12.3
Europe - Sub Saharan Africa (8)	696.3	4 483.8	5 776.5	77.6	1.6	0.5	2.4	-1.4	252.0	-8.1
Europe - Far East/Australasia (9)	1 537.1	12 703.7	15 043.4	84.4	-4.6	-3.7	-6.3	2.2	1 083.2	-21.2
Total Longhaul (5 to 9^x)	5 727.6	42 549.3	50 654.4	84.0	-4.1	-3.7	-6.1	2.1	2 389.9	-15.3
Total International (2 to 9^x)	21 718.6	62 048.0	77 588.2	80.0	-4.3	-3.4	-5.0	1.4	2 557.3	-14.0
Total Scheduled (1 to 9^x)	29 600.9	66 252.7	83 855.4	79.0	-4.5	-3.4	-5.0	1.4	2 564.3	-14.0

JANUARY - SEPTEMBER 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)	66 449.4	35 696.3	53 862.6	66.3	-9.5	-8.1	-7.6	-0.4	64.8	-20.3
Cross-border Europe (2)	121 582.7	133 142.0	192 632.8	69.1	-7.4	-6.3	-5.4	-0.7	481.9	-15.1
Total Europe (1+2)	188 032.1	168 838.3	246 495.4	68.5	-8.2	-6.7	-5.9	-0.6	546.6	-15.8
Europe - North Africa (3)	3 568.3	7 082.7	10 453.3	67.8	2.1	3.1	6.8	-2.4	165.2	26.5
Europe - Middle East (4)	6 958.4	22 718.4	32 744.8	69.4	7.3	5.8	12.9	-4.7	868.6	13.5
Intl Short/Medium Haul (2+3+4)	133 791.0	162 943.0	235 830.9	69.1	-5.3	-4.4	-2.7	-1.2	1 515.6	3.6
North Atlantic (5)	20 940.4	144 008.7	176 089.6	81.8	-6.6	-6.5	-6.7	0.1	6 486.3	-19.1
Mid Atlantic (6)	4 835.4	36 798.6	44 818.3	82.1	-6.9	-5.8	-3.6	-1.9	1 007.9	-6.4
South Atlantic (7)	4 077.5	36 573.3	46 295.4	79.0	-7.5	-6.4	-3.4	-2.5	1 618.6	-22.3
Europe - Sub Saharan Africa (8)	6 402.8	41 832.1	53 758.6	77.8	2.5	1.2	1.6	-0.3	2 330.2	-8.4
Europe - Far East/Australasia (9)	13 374.3	109 236.1	137 049.1	79.7	-7.0	-6.8	-5.0	-1.5	9 352.9	-26.0
Total Longhaul (5 to 9^x)	49 818.5	368 714.0	458 443.9	80.4	-5.7	-5.7	-4.7	-0.9	20 796.5	-21.1
Total International (2 to 9^x)	181 927.8	531 657.0	694 274.8	76.6	-6.3	-5.3	-4.0	-1.0	22 312.1	-19.8
Total Scheduled (1 to 9^x)	248 377.3	567 353.4	748 137.4	75.8	-7.2	-5.5	-4.3	-1.0	22 376.9	-19.8

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

SEPTEMBER 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	4 122.2	10 688.3	13 313.9	80.3	-4.1	-2.8	-5.2	2.0	382.2	-16.8
AY - FINNAIR	553.5	1 414.9	1 845.8	76.7	-13.1	-10.2	-10.3	0.0	48.2	4.2
AZ - ALITALIA	2 058.0	2 836.5	3 834.2	74.0	0.0	0.0	0.0	0.0	26.3	0.0
BA - BRITISH AIRWAYS PLC	2 917.0	9 791.7	12 037.9	81.3	-1.8	-1.0	-3.9	2.4	372.3	-1.5
BD - BMI	674.8	806.4	1 102.7	73.1	-20.8	-19.0	-20.4	1.3	8.0	-13.5
CV - CARGOLUX	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	371.2	-17.2
CY - CYPRUS AIRWAYS	151.5	308.2	410.1	75.1	-9.7	-10.5	-6.5	-3.4	0.0	-100.0
FI - ICELANDAIR	114.0	304.7	426.2	71.5	-12.5	-10.7	-4.0	-5.4	0.0	0.0
IB - IBERIA	1 723.1	4 073.4	5 157.7	79.0	-8.4	-8.1	-6.2	-1.6	80.5	-7.1
JP - ADRIA AIRWAYS	91.8	84.0	128.5	65.4	-12.7	-13.4	-13.7	0.2	0.1	-22.5
JU - JAT AIRWAYS	84.8	85.2	152.1	56.0	-20.1	-20.3	-10.1	-7.2	0.2	-51.5
KL - KLM ROYAL DUTCH AIRLINES	2 010.1	6 477.0	7 678.5	84.4	-5.8	-4.4	-3.6	-0.8	336.4	-9.9
KM - AIR MALTA	174.3	238.7	340.5	70.1	-1.0	-3.6	6.6	-7.4	0.6	-18.5
LG - LUXAIR	68.8	46.1	72.1	64.0	-6.8	-4.0	-2.1	-1.2	0.0	0.0
LH - DEUTSCHE LUFTHANSA AG	4 880.7	11 059.4	13 678.6	80.9	-1.5	-2.3	-3.6	1.1	569.8	-17.2
LO - LOT POLISH AIRLINES	355.4	615.4	791.3	77.8	-5.2	-7.3	-11.7	3.7	5.7	-15.3
LX - SWISS INTERNATIONAL AIRLINES	1 193.8	2 332.6	2 783.3	83.8	2.3	-4.8	-5.9	1.0	85.2	-16.6
MA - MALEV HUNGARIAN AIRLINES	351.7	383.2	474.5	80.8	10.9	-11.1	-22.7	10.5	0.4	-67.6
OA - OLYMPIC AIRLINES	446.3	531.1	802.5	66.2	-15.3	-20.2	-8.2	-10.0	3.2	-42.4
OK - CZECH AIRLINES	471.3	623.0	840.5	74.1	2.9	6.3	-0.7	4.9	2.1	-9.2
OS - AUSTRIAN	805.0	1 379.0	1 770.1	77.9	-3.7	-7.1	-8.0	0.7	31.3	-16.7
OU - CROATIA AIRLINES	177.8	128.8	190.8	67.5	-4.7	-6.6	0.3	-5.0	0.1	-21.2
PS - UKRAINE INTERNATIONAL AIRLINES	84.8	145.4	214.1	67.9	-8.9	-7.5	2.1	-7.0	0.9	43.4
RO - TAROM ROMANIAN AIR TRANSPORT	164.4	203.4	314.5	64.7	-1.7	-1.3	2.3	-2.4	0.2	-66.8
SK - SAS SCANDINAVIAN AIRLINES	1 921.5	2 042.4	2 847.1	71.7	-16.1	-18.5	-19.1	0.6	27.3	-39.0
SN - BRUSSELS AIRLINES	448.9	633.9	980.9	64.6	-3.4	-4.9	-4.8	0.0	7.7	-1.7
TK - TURKISH AIRLINES	2 245.1	3 625.8	4 905.8	73.9	15.9	26.8	26.5	0.2	66.4	47.7
TP - TAP PORTUGAL	758.8	1 895.6	2 571.6	73.7	-7.0	-7.6	-8.2	0.4	23.1	-12.7
VS - VIRGIN ATLANTIC AIRWAYS	440.5	3 194.9	3 781.4	84.5	-0.9	-0.1	-9.5	8.0	111.0	-8.9
VV - AEROSVIT	111.2	304.1	408.4	74.5	-37.0	-17.5	-23.2	5.2	4.1	-18.9
AEA	29 600.9	66 252.7	83 855.4	79.0	-4.5	-3.4	-5.0	1.4	2 564.3	-14.0

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

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* Estimated Data

09/11/2009

Traffic Update

TOTAL SCHEDULED

Scheduled Services by Airline

JANUARY - SEPTEMBER 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	36 299.2	95 599.5	121 627.1	78.6	-5.6	-4.6	-3.9	-0.6	3 503.5	-21.5
AY - FINNAIR	4 701.6	11 849.8	16 164.9	73.3	-8.7	-7.4	-9.4	1.6	345.7	-17.2
AZ - ALITALIA	16 088.5	21 000.5	32 487.9	64.6	0.0	0.0	0.0	0.0	226.4	0.0
BA - BRITISH AIRWAYS PLC	24 791.4	85 433.8	109 315.9	78.2	-4.2	-3.1	-3.5	0.3	3 191.1	-10.6
BD - BMI	5 806.2	6 796.8	9 688.2	70.2	-20.0	-15.8	-20.1	3.6	62.1	-32.6
CV - CARGOLUX	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3 404.5	-14.5
CY - CYPRUS AIRWAYS	1 208.7	2 379.6	3 361.8	70.8	-9.6	-9.2	-7.6	-1.3	10.5	-71.7
FI - ICELANDAIR	1 018.3	2 661.0	3 570.6	74.5	-13.0	-14.2	-12.3	-1.6	0.0	0.0
IB - IBERIA	15 770.0	37 825.9	47 273.0	80.0	-11.1	-6.7	-5.8	-0.8	628.3	-20.4
JP - ADRIA AIRWAYS	729.1	674.9	1 124.8	60.0	-15.5	-14.4	-7.2	-5.1	1.2	-18.1
JU - JAT AIRWAYS	744.3	762.3	1 328.5	57.4	-18.7	-17.2	-10.9	-4.3	1.5	-43.1
KL - KLM ROYAL DUTCH AIRLINES	16 934.5	55 386.2	68 048.3	81.4	-6.2	-5.2	-3.7	-1.2	3 045.4	-15.0
KM - AIR MALTA	1 184.3	1 748.0	2 619.1	66.7	-3.9	-5.4	5.0	-7.3	5.5	-11.7
LG - LUXAIR	563.6	367.2	592.5	62.0	-7.4	-4.0	-3.8	-0.1	0.0	-18.2
LH - DEUTSCHE LUFTHANSA AG	40 075.8	92 884.3	119 383.9	77.8	-4.2	-3.9	-1.9	-1.6	4 861.6	-21.8
LO - LOT POLISH AIRLINES	2 753.0	4 757.9	6 599.6	72.1	-11.7	-12.4	-10.5	-1.6	40.9	-36.2
LX - SWISS INTERNATIONAL AIRLINES	10 149.2	20 480.3	25 845.0	79.2	1.3	-3.0	-1.0	-1.7	785.6	-17.4
MA - MALEV HUNGARIAN AIRLINES	2 443.6	2 684.0	3 981.5	67.4	1.9	-17.4	-18.7	1.1	2.7	-71.7
OA - OLYMPIC AIRLINES	3 674.7	4 296.6	7 347.9	58.5	-11.9	-17.4	-2.3	-10.7	30.7	-44.1
OK - CZECH AIRLINES	3 515.0	4 471.5	6 875.1	65.0	-5.0	-3.8	-3.0	-0.6	17.5	-13.7
OS - AUSTRIAN	6 383.8	11 130.7	15 169.2	73.4	-9.1	-12.2	-10.4	-1.5	254.7	-24.7
OU - CROATIA AIRLINES	1 342.5	920.5	1 485.1	62.0	-3.4	-5.0	2.0	-4.6	1.5	-15.3
PS - UKRAINE INTERNATIONAL AIRLINES	605.5	1 045.4	1 754.7	59.6	-15.4	-15.1	-0.7	-10.1	7.0	32.8
RO - TAROM ROMANIAN AIR TRANSPORT	1 193.6	1 441.3	2 591.5	55.6	-10.6	-12.2	1.2	-8.5	2.5	-47.2
SK - SAS SCANDINAVIAN AIRLINES	16 215.6	17 946.6	25 033.2	71.7	-17.4	-17.7	-16.1	-1.4	221.8	-44.4
SN - BRUSSELS AIRLINES	3 560.5	5 232.9	8 249.4	63.4	-11.3	-9.4	-8.3	-0.7	66.8	-6.6
TK - TURKISH AIRLINES	18 253.7	28 521.9	40 137.6	71.1	11.3	16.8	22.4	-3.4	475.0	26.1
TP - TAP PORTUGAL	6 432.5	15 781.9	23 274.1	67.8	-4.4	-5.6	-5.1	-0.3	202.0	-22.1
VS - VIRGIN ATLANTIC AIRWAYS	4 094.2	29 745.0	38 028.6	78.2	-4.2	-3.5	-5.3	1.4	946.7	-17.5
VV - AEROSVIT	1 040.1	2 625.0	3 719.4	70.6	-24.7	-13.0	-15.4	2.0	25.7	-24.4
AEA	248 377.3	567 353.4	748 137.4	75.8	-7.2	-5.5	-4.3	-1.0	22 376.9	-19.8

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