

Traffic Figures

23 December 2009

EUROPEAN AIRLINES' TRAFFIC DROP IN 2009 LIKELY TO SURPASS 4%

With ten months of hard data in place, and weekly indicators up to mid-December, the Association of European Airlines reports that the year-end total for passenger traffic is almost certain to be in excess of 4% down on an already-depressed 2008 figure.

The latest monthly figures produced by AEA, for October, continue to show a decrease in passenger-kilometres, of 2.0%, marking a complete 12-month cycle of traffic losses. In October, the relatively small mid-Atlantic market was the hardest hit, at minus 6.1%, followed by Far Eastern traffic at minus 4.3%.

A notable feature of the October figures was a 5.5% reduction in capacity. October was the last month of the summer slot waiver, allowing airlines to withdraw capacity without jeopardising airport-slot entitlements. The outcome has been effective in mitigating some of the worst effects of the traffic downturn, reducing the number of empty seats in the market by an estimated 6.5 million, and in the process saving some 3.6 million tonnes of CO2 emissions.

More recent results from AEA's weekly returns point to 2009 traffic finally climbing above the heavily-depressed 2008 levels in mid-November, although the final results for November will show yet another decrease. Just as interestingly, the moderation in capacity has lessened in the absence of an extension of the slot waiver into the Winter period.

By mid-December, AEA traffic for the year-to-date stood at 4.3% below the 2008 level, a figure which is unlikely to change more than marginally when the yearly figures are compiled.

Said AEA Secretary General Ulrich Schulte-Strathaus: "2009 has been a disastrous year for European airlines, but the traffic and capacity figures tell less than half the story. The real damage has been inflicted by the collapse in revenues, to which falling ticket prices, particularly in the premium-travel segment, have contributed far more than depressed traffic levels".

"The marginal traffic increases we are beginning to see will scarcely impact our revenue base as long as yields continue to wallow around 15% below last year's levels. The only effective source of relief is in mitigating costs and a number of service providers are already putting up their tariffs for next year, knowing that the

airlines have no alternative but to pay. The political will to encourage airlines to continue to deal with temporary overcapacity in the market, through slot flexibility, seems to be lacking”.

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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

- 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

OCTOBER 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)	7 595.9	4 066.1	6 073.8	66.9	-5.8	-4.0	-6.7	1.9	7.0	-25.1
Cross-border Europe (2)	14 312.0	15 443.9	21 334.3	72.4	-2.7	-2.4	-6.9	3.4	61.0	-6.2
Total Europe (1+2)	21 907.8	19 510.0	27 408.1	71.2	-3.8	-2.7	-6.9	3.0	68.0	-8.6
Europe - North Africa (3)	431.2	885.3	1 212.5	73.0	3.4	5.2	10.9	-3.9	19.9	-13.1
Europe - Middle East (4)	850.5	2 722.3	3 794.1	71.8	10.8	8.0	16.2	-5.5	103.2	30.7
Intl Short/Medium Haul (2+3+4)	15 794.1	19 051.5	26 341.0	72.3	-0.6	-0.7	-3.4	2.0	184.1	10.3
North Atlantic (5)	2 443.6	16 798.4	19 103.6	87.9	-2.2	-1.9	-9.1	6.4	819.2	-10.7
Mid Atlantic (6)	476.8	3 700.1	4 667.2	79.3	-8.4	-6.1	-4.9	-1.0	131.0	4.9
South Atlantic (7)	502.5	4 531.5	5 331.2	85.0	-0.9	0.9	-2.1	2.5	213.5	-4.1
Europe - Sub Saharan Africa (8)	711.3	4 701.2	6 089.9	77.2	2.7	2.2	2.6	-0.3	276.8	-4.9
Europe - Far East/Australasia (9)	1 578.4	12 973.1	15 224.8	85.2	-4.7	-4.3	-7.8	3.1	1 157.0	-20.9
Total Longhaul (5 to 9^{*)}	5 727.6	42 723.1	50 448.7	84.7	-2.7	-2.3	-6.3	3.5	2 597.6	-14.0
Total International (2 to 9^{*)}	21 321.3	61 774.6	76 789.6	80.4	-2.1	-1.8	-5.4	2.9	2 781.7	-12.7
Total Scheduled (1 to 9^{*)}	28 917.2	65 840.7	82 863.4	79.5	-3.1	-2.0	-5.5	2.8	2 788.7	-12.7

JANUARY - OCTOBER 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)	74 045.3	39 762.4	59 936.4	66.3	-9.2	-7.7	-7.5	-0.2	71.8	-20.8
Cross-border Europe (2)	135 894.6	148 585.9	213 967.1	69.4	-6.9	-5.9	-5.6	-0.3	542.9	-14.2
Total Europe (1+2)	209 939.9	188 348.3	273 903.5	68.8	-7.7	-6.3	-6.0	-0.2	614.7	-15.0
Europe - North Africa (3)	3 999.5	7 968.0	11 665.8	68.3	2.2	3.3	7.2	-2.6	185.1	20.6
Europe - Middle East (4)	7 808.9	25 440.7	36 539.0	69.6	7.7	6.0	13.2	-4.7	971.8	15.1
Intl Short/Medium Haul (2+3+4)	149 585.1	181 994.5	262 171.9	69.4	-4.8	-4.0	-2.8	-0.9	1 699.7	4.3
North Atlantic (5)	23 384.0	160 807.1	195 193.2	82.4	-6.2	-6.0	-6.9	0.8	7 305.5	-18.2
Mid Atlantic (6)	5 312.2	40 498.7	49 485.5	81.8	-7.0	-5.8	-3.7	-1.8	1 138.9	-5.2
South Atlantic (7)	4 580.0	41 104.8	51 626.6	79.6	-6.8	-5.6	-3.3	-2.0	1 832.1	-20.6
Europe - Sub Saharan Africa (8)	7 114.1	46 533.3	59 848.5	77.8	2.5	1.3	1.7	-0.3	2 607.0	-8.1
Europe - Far East/Australasia (9)	14 952.7	122 209.2	152 274.0	80.3	-6.7	-6.5	-5.3	-1.0	10 509.9	-25.5
Total Longhaul (5 to 9^{*)}	55 546.1	411 437.1	508 892.6	80.8	-5.4	-5.3	-4.8	-0.4	23 394.1	-20.4
Total International (2 to 9^{*)}	203 249.1	593 431.6	771 064.5	77.0	-5.9	-4.9	-4.2	-0.6	25 093.8	-19.1
Total Scheduled (1 to 9^{*)}	277 294.4	633 194.1	831 000.8	76.2	-6.8	-5.1	-4.4	-0.6	25 165.6	-19.1

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.

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

Traffic Update

TOTAL SCHEDULED

Scheduled Services by Airline

OCTOBER 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	4 207.6	10 875.7	13 408.7	81.1	-3.6	-3.0	-5.4	2.1	404.7	-19.4
AY - FINNAIR	551.0	1 412.7	1 806.2	78.2	-12.2	-10.6	-12.3	1.4	52.4	9.9
AZ - ALITALIA	1 924.4	2 781.4	3 872.1	71.8	0.0	0.0	0.0	0.0	37.5	0.0
BA - BRITISH AIRWAYS PLC	2 756.6	9 471.7	11 727.7	80.8	-3.0	-2.1	-6.6	3.6	396.4	0.1
BD - BMI	626.7	723.8	1 039.6	69.6	-20.5	-19.3	-19.6	0.2	9.5	-11.2
CV - CARGOLUX	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	404.7	-16.1
CY - CYPRUS AIRWAYS	143.5	290.2	406.8	71.3	-10.3	-12.5	-5.0	-6.1	0.0	-100.0
FI - ICELANDAIR	102.7	274.4	365.5	75.1	-5.1	-3.5	-6.3	2.2	0.0	0.0
IB - IBERIA	1 724.5	4 176.6	5 178.4	80.7	-8.5	-4.6	-6.2	1.4	96.3	0.7
JP - ADRIA AIRWAYS	86.3	76.6	118.2	64.8	-11.8	-12.3	-16.6	3.2	0.2	-6.0
JU - JAT AIRWAYS	68.7	70.0	140.9	49.7	-20.4	-20.7	-7.9	-8.0	0.2	-51.4
KL - KLM ROYAL DUTCH AIRLINES	2 019.6	6 621.3	7 814.7	84.7	-7.0	-5.3	-5.1	-0.1	355.2	-17.2
KM - AIR MALTA	163.6	225.9	319.2	70.8	5.1	3.8	13.0	-6.3	0.7	-4.2
LG - LUXAIR	67.1	42.6	68.5	62.1	-9.6	-6.2	-7.3	0.8	0.0	150.0
LH - DEUTSCHE LUFTHANSA AG	4 922.2	11 118.2	13 793.0	80.6	1.7	1.0	-1.9	2.3	620.1	-13.6
LO - LOT POLISH AIRLINES	334.6	511.9	670.2	76.4	0.2	-0.6	-5.6	3.8	5.7	-7.1
LX - SWISS INTERNATIONAL AIRLINES	1 264.1	2 499.5	2 899.3	86.2	6.7	-0.2	-5.1	4.2	98.7	-6.4
MA - MALEV HUNGARIAN AIRLINES	327.0	359.1	454.5	79.0	12.8	2.4	-10.7	10.1	0.4	-43.0
OA - OLYMPIC AIRLINES	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OK - CZECH AIRLINES	431.8	512.3	742.2	69.0	2.2	-2.9	-8.5	4.0	1.9	-24.2
OS - AUSTRIAN	811.8	1 372.6	1 735.2	79.1	0.5	-4.8	-9.3	3.8	31.6	-15.3
OU - CROATIA AIRLINES	147.1	100.8	169.6	59.4	-4.7	-4.9	-1.8	-2.0	0.1	-26.5
PS - UKRAINE INTERNATIONAL AIRLINES	70.7	128.1	204.1	62.8	-11.0	-7.5	-5.4	-1.4	0.6	-2.1
RO - TAROM ROMANIAN AIR TRANSPORT	153.5	180.4	315.0	57.3	1.5	2.4	3.7	-0.7	0.3	-46.0
SK - SAS SCANDINAVIAN AIRLINES	1 996.6	2 130.0	2 825.8	75.4	-12.3	-14.6	-20.1	4.8	26.4	-44.4
SN - BRUSSELS AIRLINES	436.7	604.1	972.5	62.1	1.7	-1.5	-5.7	2.7	7.6	-10.8
TK - TURKISH AIRLINES	2 288.0	3 805.5	4 976.8	76.5	10.7	24.8	25.6	-0.5	79.8	38.5
TP - TAP PORTUGAL	731.1	1 877.7	2 557.3	73.4	-2.6	-2.1	-9.5	5.5	27.2	0.7
VS - VIRGIN ATLANTIC AIRWAYS	464.7	3 355.1	3 935.1	85.3	-3.1	-2.8	-12.8	8.7	126.3	-4.9
VV - AEROSVIT	95.0	242.6	346.4	70.0	-41.2	-31.2	-32.5	1.3	4.2	-8.4
AEA	28 917.2	65 840.7	82 863.4	79.5	-3.1	-2.0	-5.5	2.8	2 788.7	-12.7

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* Estimated Data

04/12/2009

Traffic Update

TOTAL SCHEDULED

Scheduled Services by Airline

JANUARY - OCTOBER 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	40 506.8	106 475.3	135 035.7	78.8	-5.4	-4.4	-4.0	-0.3	3 908.2	-21.3
AY - FINNAIR	5 252.6	13 262.5	17 971.1	73.8	-9.1	-7.7	-9.7	1.6	398.1	-14.4
AZ - ALITALIA	18 012.9	23 781.8	36 360.0	65.4	0.0	0.0	0.0	0.0	264.0	0.0
BA - BRITISH AIRWAYS PLC	27 548.0	94 905.5	121 043.6	78.4	-4.1	-3.0	-3.8	0.7	3 587.5	-9.5
BD - BMI	6 432.9	7 520.6	10 727.8	70.1	-20.0	-16.1	-20.0	3.3	71.6	-30.4
CV - CARGOLUX	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3 809.2	-14.7
CY - CYPRUS AIRWAYS	1 352.2	2 669.8	3 768.6	70.8	-9.7	-9.6	-7.3	-1.8	10.5	-74.1
FI - ICELANDAIR	1 121.0	2 935.4	3 936.1	74.6	-12.3	-13.3	-11.8	-1.3	0.0	0.0
IB - IBERIA	17 494.5	42 002.5	52 451.4	80.1	-10.9	-6.5	-5.8	-0.6	724.6	-18.1
JP - ADRIA AIRWAYS	815.5	751.5	1 243.0	60.5	-15.1	-14.2	-8.1	-4.3	1.4	-16.9
JU - JAT AIRWAYS	813.1	832.3	1 469.4	56.6	-18.9	-17.5	-10.7	-4.7	1.6	-44.1
KL - KLM ROYAL DUTCH AIRLINES	18 954.2	62 007.4	75 863.0	81.7	-6.3	-5.2	-3.9	-1.1	3 400.5	-15.3
KM - AIR MALTA	1 347.9	1 973.9	2 938.2	67.2	-2.9	-4.5	5.8	-7.2	6.2	-10.9
LG - LUXAIR	630.7	409.7	661.0	62.0	-7.7	-4.2	-4.1	0.0	0.0	-4.2
LH - DEUTSCHE LUFTHANSA AG	44 998.0	104 002.5	133 177.0	78.1	-3.6	-3.4	-1.9	-1.2	5 481.7	-21.0
LO - LOT POLISH AIRLINES	3 087.6	5 269.8	7 269.8	72.5	-10.6	-11.4	-10.0	-1.1	46.6	-33.6
LX - SWISS INTERNATIONAL AIRLINES	11 413.3	22 979.8	28 744.3	79.9	1.9	-2.7	-1.4	-1.1	884.3	-16.3
MA - MALEV HUNGARIAN AIRLINES	2 770.6	3 043.0	4 436.0	68.6	3.1	-15.4	-17.9	2.0	3.2	-69.7
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	3 946.8	4 983.8	7 617.3	65.4	-4.3	-3.7	-3.6	-0.1	19.4	-14.9
OS - AUSTRIAN	7 195.6	12 503.3	16 904.4	74.0	-8.1	-11.4	-10.3	-1.0	286.3	-23.8
OU - CROATIA AIRLINES	1 489.7	1 021.3	1 654.7	61.7	-3.5	-5.0	1.6	-4.3	1.6	-16.4
PS - UKRAINE INTERNATIONAL AIRLINES	676.3	1 173.5	1 958.8	59.9	-15.0	-14.3	-1.2	-9.2	7.6	28.9
RO - TAROM ROMANIAN AIR TRANSPORT	1 347.1	1 621.7	2 906.5	55.8	-9.4	-10.8	1.4	-7.7	2.8	-47.0
SK - SAS SCANDINAVIAN AIRLINES	18 212.2	20 076.7	27 859.0	72.1	-16.9	-17.4	-16.5	-0.8	248.2	-44.4
SN - BRUSSELS AIRLINES	3 997.2	5 837.0	9 221.9	63.3	-10.0	-8.6	-8.1	-0.4	74.4	-7.0
TK - TURKISH AIRLINES	20 541.7	32 327.4	45 114.4	71.7	11.2	17.7	22.8	-3.1	554.7	27.7
TP - TAP PORTUGAL	7 163.6	17 659.6	25 831.4	68.4	-4.2	-5.2	-5.6	0.2	229.3	-19.9
VS - VIRGIN ATLANTIC AIRWAYS	4 558.9	33 100.1	41 963.7	78.9	-4.0	-3.5	-6.0	2.1	1 073.0	-16.2
VV - AEROSVIT	1 135.1	2 867.6	4 065.9	70.5	-26.5	-14.9	-17.2	1.9	29.8	-22.5
AEA	277 294.4	633 194.1	831 000.8	76.2	-6.8	-5.1	-4.4	-0.6	25 165.6	-19.1

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04/12/2009