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Business Intelligence

Intra European Capacity Report

November 2008

This report is produced by RDC Aviation in partnership with Innovata and data is derived from the Innovata SRS database. The report shows frequency and capacity information for all carriers contained within the Innovata SRS database for operations within Europe.

RDC Aviation is a provider of software, consultancy, environmental emissions analysis and data to the international aviation industry.

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Report Highlights

- Of the top 25 Airports, only Rome (FCO) and Istanbul (IST) saw growth in November 2008, versus 2007.
- 18 of the top 25 airlines saw a year on year decrease in Intra-European seating capacity in November.
- Star Alliance and Low-Cost are the only airline groupings that have grown year-to-date to November, despite this, total capacity has increased by 1%.
- London Stansted saw a 21% decrease in low cost capacity versus November 2007.
- Oneworld saw a reduction in capacity at all its most served airports, except for Paris Orly.

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2008 Intra European Capacity Report, Current Month - November



Top 25 Airports by Departing Seat Capacity		November 2008	% of Europe	November 2007	November 2006			
MAD	Madrid	2,320,243	↓	3.8%	2,620,033	↑	2,535,109	↑
CDG	Paris	1,960,714	↓	3.2%	2,031,075	↑	1,970,043	↑
FRA	Frankfurt	1,891,076	↓	3.1%	1,943,363	↓	1,979,121	↑
LHR	London Heathrow	1,837,174	↓	3.0%	2,004,722	↓	2,111,048	↑
FCO	Rome	1,693,946	↑	2.7%	1,638,969	↑	1,570,960	↑
MUC	Munich	1,668,760	↓	2.7%	1,754,017	↑	1,678,835	↑
AMS	Amsterdam	1,539,805	↓	2.5%	1,631,894	↑	1,609,881	↑
BCN	Barcelona	1,256,680	↓	2.0%	1,583,977	↓	1,774,925	↑
OSL	Oslo	1,122,509	↓	1.8%	1,226,575	↑	1,157,434	↑
IST	Istanbul	1,043,551	↑	1.7%	948,611	↑	863,701	↑
DUB	Dublin	1,038,236	↓	1.7%	1,123,230	↑	1,000,286	↑
CPH	Copenhagen	985,823	↓	1.6%	1,199,329	↑	1,125,120	↑
ORY	Paris	984,775	↓	1.6%	1,042,481	↓	1,053,819	↓
ZRH	Zurich	981,299	↓	1.6%	990,450	↑	863,713	↑
VIE	Vienna	977,525	↓	1.6%	1,068,114	↑	857,652	↑
LGW	London Gatwick	914,586	↓	1.5%	1,013,295	↑	961,758	↓
DUS	Dusseldorf	872,003	↓	1.4%	887,737	↓	895,313	↑
ARN	Stockholm	851,565	↓	1.4%	1,051,344	↑	992,190	↓
STN	Stansted	837,128	↓	1.4%	1,048,006	↓	1,109,193	↑
TXL	Berlin	815,244	↓	1.3%	853,525	↑	696,947	↑
ATH	Athens	786,616	↓	1.3%	791,945	↑	766,348	↑
BRU	Brussels	766,237	↓	1.2%	888,569	↑	796,985	↑
MXP	Milan	750,886	↓	1.2%	1,019,598	↑	933,516	↑
HEL	Helsinki	714,672	↓	1.2%	730,806	↑	711,385	↑
SVO	Moscow	696,043	↓	1.1%	714,743	↑	650,216	↑

Top 25 Airlines by Departing Seat Capacity		November 2008	% of Europe	November 2007	November 2006			
LH	Lufthansa	5,557,598	↓	9.0%	5,569,242	↑	5,433,799	↑
FR	Ryanair	4,883,004	↓	7.9%	4,966,164	↑	4,017,006	↑
AF	Air France	4,372,976	↓	7.1%	4,485,749	↑	4,373,802	↑
SK	SAS	3,308,904	↓	5.4%	3,675,839	↑	3,573,646	↓
U2	easyJet	3,132,585	↓	5.1%	3,186,311	↑	2,810,420	↑
IB	Iberia	2,905,037	↓	4.7%	3,401,568	↓	3,607,918	↑
BA	British Airways	2,322,957	↓	3.8%	2,727,358	↓	3,276,538	↓
AB	Air Berlin	2,304,352	↓	3.7%	2,511,366	↑	1,590,408	↑
TK	Turkish Airlines	2,039,655	↑	3.3%	1,832,294	↑	1,689,369	↑
AZ	Alitalia	1,828,879	↓	3.0%	2,658,273	↓	2,662,217	↑
KL	KLM	1,635,026	↑	2.7%	1,627,568	↑	1,511,058	↑
LX	SWISS	1,326,841	↑	2.2%	1,248,372	↑	1,065,835	↑
AP	Air One	1,067,667	↑	1.7%	1,002,786	↑	915,503	↑
DY	Norwegian	988,125	↑	1.6%	743,200	↑	601,176	↑
OS	Austrian	972,303	↓	1.6%	1,050,723	↑	952,573	↑
BE	FlyBE	964,947	↓	1.6%	967,095	↑	650,569	↑
EI	Aer Lingus	950,363	↓	1.5%	952,342	↑	877,039	↑
UX	Air Europa	928,409	↓	1.5%	934,067	↑	847,784	↑
TP	TAP-Air Portugal	902,617	↓	1.5%	1,015,268	↑	860,336	↑
SU	Aeroflot	885,219	↑	1.4%	863,632	↑	761,154	↑
JK	Spanair	881,448	↓	1.4%	1,182,855	↓	1,252,621	↓
AY	Finnair	817,623	↓	1.3%	823,354	↓	873,230	↓
X3	Tuifly (HLX)	673,452	↓	1.1%	814,187	↑	407,830	↑
OA	Olympic Airlines	645,518	↓	1.0%	717,144	↑	676,514	↓
IG	Meridiana	642,068	↑	1.0%	503,040	↑	494,648	↑

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Intra European Seats Available (000's)						
Carrier Type	November 2008	% of Market	Year to Date	% Growth	% of Market	2007 YTD
Low Cost	17,115	28.1%	241,334	9.2%	↑	220,923
Star Alliance	14,610	24.0%	171,382	2.5%	↑	167,160
Skyteam	9,295	15.3%	112,708	(1.4%)	↓	114,307
OneWorld	6,363	10.4%	77,283	(11.8%)	↓	87,605
Other	13,518	22.2%	162,858	(2.9%)	↓	167,740
Total Seats	60,901		765,565	1.0%	↑	757,735

Intra European Sectors Flown						
Carrier Type	November 2008	% of Market	Year to Date	% Growth	% of Market	2007 YTD
Low Cost	110,672	21.7%	1,530,610	6.8%	↑	1,432,775
Star Alliance	130,358	25.5%	1,533,647	1.2%	↑	1,515,247
Skyteam	78,291	15.3%	960,526	(4.4%)	↓	1,004,285
OneWorld	53,547	10.5%	657,530	(10.4%)	↓	734,038
Other	137,711	27.0%	1,650,489	(4.7%)	↓	1,731,636
Total Sectors	510,579		6,332,802	(1.3%)	↓	6,417,981

Intra European Average Aircraft Size						
Carrier Type	November 2008		Year to Date	% Growth		2007 YTD
Low Cost	154.6		157.7	2.3%	↑	154.2
Star Alliance	112.1		111.7	1.3%	↑	110.3
Skyteam	118.7		117.3	3.1%	↑	113.8
OneWorld	118.8		117.5	(1.5%)	↓	119.3
Other	98.2		98.7	1.9%	↑	96.9
European Ave AC Size	120.5		120.6	1.4%	↑	118.9

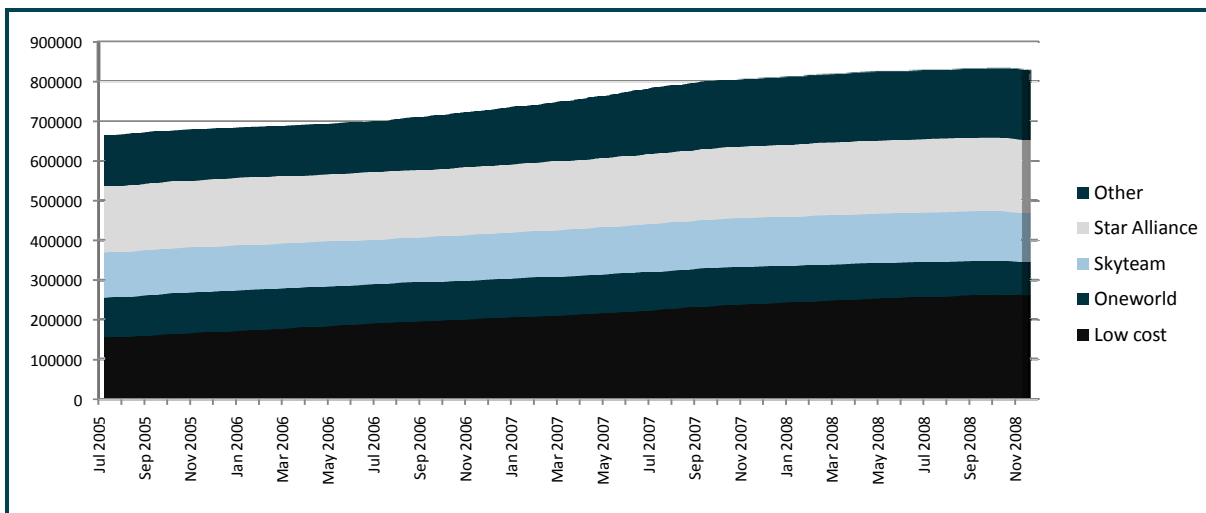
Alliance Airlines in this report

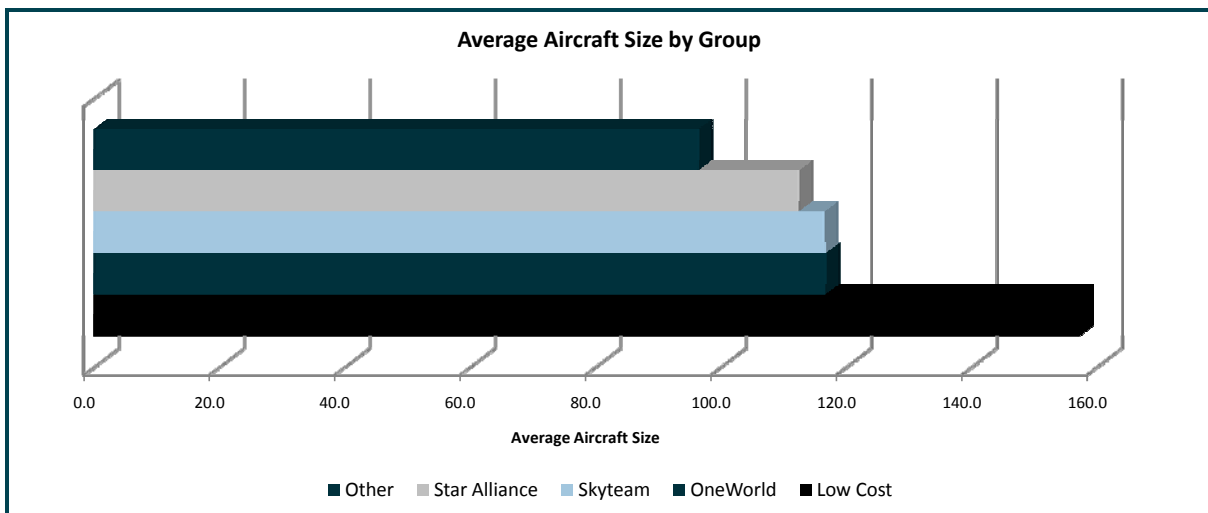
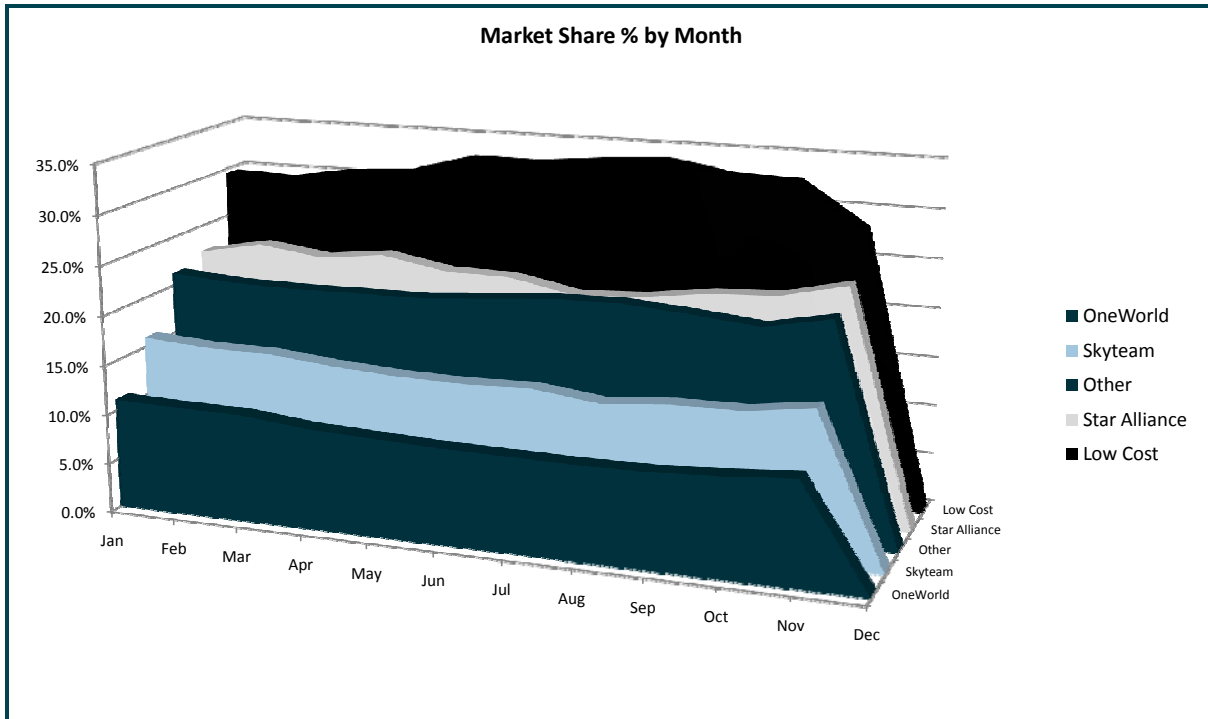
Star Alliance - Lufthansa, SAS, Spanair, SWISS, Austrian, TAP, bmi, LOT - Polish Airlines, Croatia Airlines, Blue1 , Adria Airways
 One World - British Airways, Iberia, Finnair, Malev
 Skyteam - Air France, Alitalia, KLM, CSA, Aeroflot

SWISS - Joined Star Alliance Apr 06
 Malev - Joined Oneworld Apr 07

Aeroflot - Joined Skyteam Apr 06




Aer Lingus - Left Oneworld Sep 06





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2008				2007				2006			
Low Cost											
Destinations Served		270	19	↑	251		4		247		
Most Served Low Cost Airports and Seats Available											
STN	Stansted	806,268	(21.2%)	↓	STN	Stansted	1,022,977		STN	Stansted	1,086,196
LGW	London Gatwick	540,989	3.1%	↑	LGW	London Gatwick	524,585		LGW	London Gatwick	445,440
DUB	Dublin	522,324	(2.5%)	↓	DUB	Dublin	535,488		DUB	Dublin	436,982
LTN	Luton	400,085	(6.9%)	↓	LTN	Luton	429,887		LTN	Luton	394,843
TXL	Berlin	364,008	(8.9%)	↓	TXL	Berlin	399,607		TXL	Berlin	269,138
PMI	Palma De Mallorca	351,125	(9.6%)	↓	PMI	Palma De Mallorca	388,491		PMI	Palma De Mallorca	372,175
OSL	Oslo	332,687	(11.4%)	↓	OSL	Oslo	375,492		OSL	Oslo	332,260
DUS	Dusseldorf	329,065	0.4%	↑	DUS	Dusseldorf	327,789		DUS	Dusseldorf	221,144
MAD	Madrid	328,505	(11.2%)	↓	MAD	Madrid	369,924		MAD	Madrid	318,741
CGN	Cologne	320,830	(12.4%)	↓	CGN	Cologne	366,450		CGN	Cologne	340,746
Star Alliance											
Destinations Served		209	(9)	↓	218		(3)		221		
Most Served Star Alliance Airports and Seats Available											
FRA	Frankfurt	1,515,156	(1.5%)	↓	FRA	Frankfurt	1,538,505		FRA	Frankfurt	1,537,547
MUC	Munich	1,125,061	1.7%	↑	MUC	Munich	1,106,427		MUC	Munich	1,043,962
ZRH	Zurich	722,314	2.7%	↑	ZRH	Zurich	703,354		ZRH	Zurich	618,314
OSL	Oslo	644,670	(8.9%)	↓	OSL	Oslo	707,737		OSL	Oslo	688,781
CPH	Copenhagen	636,976	(4.9%)	↓	CPH	Copenhagen	669,827		CPH	Copenhagen	643,463
LHR	London Heathrow	575,409	(7.2%)	↓	LHR	London Heathrow	619,893		LHR	London Heathrow	635,989
VIE	Vienna	566,009	(7.5%)	↓	VIE	Vienna	612,155		VIE	Vienna	551,611
ARN	Stockholm	543,547	(12.9%)	↓	ARN	Stockholm	624,208		ARN	Stockholm	588,480
LIS	Lisbon	404,070	(0.7%)	↓	LIS	Lisbon	407,101		LIS	Lisbon	359,846
DUS	Dusseldorf	364,898	(3.0%)	↓	DUS	Dusseldorf	376,193		DUS	Dusseldorf	360,233
OneWorld											
Destinations Served		159	(2)	↓	161		(8)		169		
Most Served OneWorld Airports and Seats Available											
MAD	Madrid	1,239,646	(8.6%)	↓	MAD	Madrid	1,356,245		MAD	Madrid	1,245,565
LHR	London Heathrow	903,809	(8.1%)	↓	LHR	London Heathrow	983,210		LHR	London Heathrow	1,087,086
HEL	Helsinki	422,468	(0.7%)	↓	HEL	Helsinki	425,355		HEL	Helsinki	447,088
BCN	Barcelona	303,099	(37.4%)	↓	BCN	Barcelona	484,021		BCN	Barcelona	669,393
LGW	London Gatwick	263,242	(26.6%)	↓	LGW	London Gatwick	358,816		LGW	London Gatwick	393,014
BUD	Budapest	177,313	(2.6%)	↓	BUD	Budapest	182,087		BUD	Budapest	180,342
AMS	Amsterdam	99,290	(7.0%)	↓	AMS	Amsterdam	106,721		AMS	Amsterdam	117,207
VLC	Valencia	98,888	(11.0%)	↓	VLC	Valencia	111,141		VLC	Valencia	119,756
AGP	Malaga	81,625	(13.4%)	↓	AGP	Malaga	94,243		AGP	Malaga	129,119
ORY	Paris	79,776	1.8%	↑	ORY	Paris	78,395		ORY	Paris	82,057
Skyteam											
Destinations Served		180	1	↑	179		(2)		181		
Most Served Skyteam Airports and Seats Available											
CDG	Paris	1,278,625	(1.2%)	↓	CDG	Paris	1,293,785		CDG	Paris	1,258,993
AMS	Amsterdam	913,282	0.7%	↑	AMS	Amsterdam	906,516		AMS	Amsterdam	841,641
FCO	Rome	798,856	(0.3%)	↓	FCO	Rome	801,425		FCO	Rome	787,655
ORY	Paris	627,294	(5.1%)	↓	ORY	Paris	660,947		ORY	Paris	679,422
SVO	Moscow	501,138	3.4%	↑	SVO	Moscow	484,578		SVO	Moscow	431,291
PRG	Prague	323,091	(6.3%)	↓	PRG	Prague	344,940		PRG	Prague	337,910
LIN	Milan	280,592	2.6%	↑	LIN	Milan	273,611		LIN	Milan	263,972
LYS	Lyon	257,267	(0.5%)	↓	LYS	Lyon	258,498		LYS	Lyon	242,274
TLS	Toulouse	218,271	0.5%	↑	TLS	Toulouse	217,131		TLS	Toulouse	207,844
NCE	Nice	176,238	(2.2%)	↓	NCE	Nice	180,201		NCE	Nice	175,626

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Low Cost		2008 YTD				2007 YTD		
Growth	Airline	Seats	Sectors	Aircraft Size	Seats	Sectors	Aircraft Size	
↑	Ryanair	64,816,794	↑ 342,946	↑ 189	⇔	55,147,744	291,796	189
↑	easyJet	47,730,906	↑ 307,344	↑ 155	↑	41,681,651	272,810	153
↑	Air Berlin	29,981,990	↑ 183,722	↑ 163	↑	25,752,823	161,788	159
↓	Tuifly (HLX)	11,498,065	↓ 67,071	↓ 171	↑	11,782,399	70,203	168
↑	FlyBE	11,319,817	↑ 145,507	↑ 78	↑	10,297,564	133,679	77
↑	Norwegian	10,427,716	↑ 69,171	↑ 151	↑	7,282,201	49,386	147
↑	Germanwings	8,649,822	↑ 60,360	↑ 143	⇔	8,552,136	59,964	143
↑	Vueling	7,872,653	↑ 43,973	↑ 179	⇔	7,682,256	42,829	179
↑	Wizzair	6,452,820	↑ 35,849	↑ 180	↑	4,543,134	25,427	179
↑	Sterling	5,671,646	↑ 37,275	↑ 152	↓	5,564,882	35,371	157
STAR ALLIANCE THE AIRLINE NETWORK FOR EARTH								
Star Alliance		2008 YTD				2007 YTD		
Growth	Airline	Seats	Sectors	Aircraft Size	Seats	Sectors	Aircraft Size	
↑	Lufthansa	62,713,328	↑ 593,341	↑ 106	↑	60,664,911	583,050	104
↑	SAS	38,703,396	↑ 294,692	↓ 131	↑	37,469,391	296,238	126
↑	SWISS	14,580,300	↑ 110,445	↓ 132	↑	13,403,253	104,655	128
↓	Spanair	12,681,980	↓ 88,136	↓ 144	↑	14,053,303	98,052	143
↑	Austrian	12,054,174	↑ 135,041	↓ 89	↑	11,787,060	135,151	87
↑	TAP-Air Portugal	11,060,537	↑ 92,589	↑ 119	↓	10,358,261	76,307	136
↓	bmi	7,101,022	↓ 72,844	↑ 97	↓	7,258,330	72,299	100
↓	LOT - Polish Airlines	5,350,096	↓ 75,687	↓ 71	↑	5,464,108	81,410	67
↑	Croatia Airlines	2,965,362	↑ 25,030	↑ 118	↑	2,611,409	22,726	115
↓	Blue1	2,479,278	↓ 22,762	↓ 109	↑	2,589,492	25,658	101
oneworld								
OneWorld		2008 YTD				2007 YTD		
Growth	Airline	Seats	Sectors	Aircraft Size	Seats	Sectors	Aircraft Size	
↓	Iberia	34,369,074	↓ 303,016	↓ 113	↓	38,604,762	333,009	116
↓	British Airways	29,790,593	↓ 236,679	↓ 126	↓	35,850,439	279,152	128
↓	Finnair	8,950,501	↓ 73,426	↓ 122	↑	9,131,346	77,364	118
↑	Malev-Hungarian Airlines	4,173,022	↑ 44,409	↓ 94	↑	4,018,834	44,513	90
SKYTEAM								
Skyteam		2008 YTD				2007 YTD		
Growth	Airline	Seats	Sectors	Aircraft Size	Seats	Sectors	Aircraft Size	
↓	Air France	51,192,438	↓ 465,439	↓ 110	↑	51,832,329	473,644	109
↓	Alitalia	24,843,076	↓ 180,743	↓ 137	↑	30,337,945	232,979	130
↑	KLM	18,865,528	↑ 166,505	↑ 113	↑	17,610,008	165,570	106
↑	Aeroflot	10,616,850	↑ 78,352	↑ 136	↑	7,579,963	65,083	116
↑	CSA	7,190,142	↑ 69,487	↑ 103	↓	6,946,255	67,009	104
Other		2008 YTD				2007 YTD		
Growth	Airline	Seats	Sectors	Aircraft Size	Seats	Sectors	Aircraft Size	
↑	Turkish Airlines	23,310,485	↑ 143,126	↑ 163	⇔	20,022,734	122,796	163
↑	Air One	12,018,806	↑ 89,641	↑ 134	↑	11,137,695	88,335	126
↑	Aer Lingus	11,666,898	↑ 63,406	↑ 184	↓	10,489,810	56,773	185
↑	Air Europa	10,425,363	↑ 56,466	↓ 185	↑	10,424,034	56,502	184
↓	Olympic Airlines	8,372,973	↓ 88,247	↓ 95	↓	8,671,801	90,679	96
↑	Aegean Airlines	7,318,362	↑ 51,180	↑ 143	↑	6,691,845	49,820	134
↑	Brussels Airlines	7,136,293	↑ 67,000	↑ 107	↑	6,746,314	65,365	103
↑	Meridiana	6,470,917	↑ 48,580	↑ 133	↑	6,116,352	47,784	128
↑	Wideroe	6,176,652	↑ 152,274	↑ 41	⇔	5,963,693	147,074	41
↑	Pulkovo Aviation	4,204,269	↑ 31,666	↑ 133	↑	3,766,451	30,099	125