

Intra European Capacity Report

JULY 2009

Capacity and Frequency Analysis
for Intra European Operations



Intra European Capacity Report

July 2009

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

- Only 5 of the top 25 airports saw a rise in Intra-European seat capacity, versus July 2008.
- The total number of Intra-European seats available continued to decline during July, a trend that has continued for the 3 alliances and low-cost airlines for the whole of 2009 to date.
- The low cost sector has seen the lowest reduction in sectors flown out of all of the airline groups, at around 3% versus around 10% for the three main airline alliances.
- The number of destinations served remained relatively stable, when compared with July 2008.
- Alliance seats, sectors and aircraft size flown have suffered across the board.

Innovata is a global leader in travel content management and distribution solutions and as a partner of IATA, maintains and markets SRS - one of the worlds largest flight databases - with over 900 participating airlines including over 100 Low Cost Carriers. Further information is available at www.innovata-llc.com

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Top 25 Airports by Departing Seat Capacity

		July 2009		% of Europe	July 2008		July 2007	
MAD	Madrid	2,364,140	↓	3.3%	2,553,293	↓	2,653,843	↑
CDG	Paris	1,891,444	↓	2.6%	2,162,169	↑	2,095,707	↑
LHR	London Heathrow	1,890,107	↓	2.6%	1,991,378	↓	2,176,919	↑
FRA	Frankfurt	1,865,594	↓	2.6%	2,005,611	↓	2,055,374	↓
FCO	Rome	1,847,147	↓	2.5%	1,967,965	↑	1,832,982	↑
MUC	Munich	1,718,695	↓	2.4%	1,835,828	↑	1,779,497	↑
BCN	Barcelona	1,632,057	↓	2.2%	1,874,888	↓	2,038,214	↑
LGW	London Gatwick	1,580,319	↑	2.2%	1,368,693	↑	1,265,346	↑
AMS	Amsterdam	1,557,177	↓	2.1%	1,792,775	↑	1,753,521	↓
PMI	Palma De Mallorca	1,432,546	↑	2.0%	1,329,540	↑	1,308,531	↑
IST	Istanbul	1,369,226	↑	1.9%	1,253,520	↑	1,189,677	↑
STN	Stansted	1,251,968	↓	1.7%	1,348,599	↓	1,407,690	↑
ATH	Athens	1,098,523	↑	1.5%	1,060,576	↑	1,036,462	↑
DUB	Dublin	1,071,220	↓	1.5%	1,249,744	↑	1,209,279	↑
VIE	Vienna	1,029,073	↓	1.4%	1,102,003	↑	1,032,920	↑
ORY	Paris	1,016,347	↓	1.4%	1,165,522	↓	1,187,091	↑
ZRH	Zurich	1,004,757	↓	1.4%	1,103,349	↑	1,003,312	↑
DUS	Dusseldorf	979,081	↓	1.3%	1,010,582	↑	979,465	↑
CPH	Copenhagen	959,368	↓	1.3%	1,177,592	↑	1,100,635	↑
OSL	Oslo	916,850	↓	1.3%	1,082,196	↑	1,037,284	↑
MAN	Manchester	902,087	↑	1.2%	784,679	↓	817,775	↑
MLA	Milano Malpensa	805,524	↓	1.1%	876,891	↓	1,069,199	↑
TXL	Berlin	803,521	↓	1.1%	823,834	↑	756,022	↑
BRU	Brussels	780,521	↓	1.1%	961,955	↑	806,955	↑
LIS	Lisbon	729,933	↓	1.0%	747,733	↑	739,415	↑

Top 25 Airlines by Departing Seat Capacity

		July 2009		% of Europe	July 2008		July 2007	
FR	Ryanair	7,440,363	↑	10.0%	6,357,204	↑	5,305,386	↑
LH	Lufthansa	5,415,214	↓	7.3%	5,721,636	↑	5,463,199	↑
U2	easyJet	4,587,551	↑	6.2%	4,462,775	↑	3,715,603	↑
AF	Air France	4,109,998	↓	5.5%	4,851,169	↑	4,654,908	↑
AB	airberlin	3,042,648	↑	4.1%	3,020,858	↑	2,636,429	↑
IB	Iberia	2,747,618	↓	3.7%	3,162,024	↓	3,572,046	↓
BA	British Airways	2,616,621	↓	3.5%	2,785,500	↓	3,311,911	↓
TK	Turkish Airlines	2,557,373	↑	3.4%	2,322,131	↑	2,205,262	↑
TOM	Thomsonfly	2,313,504	↑	3.1%	961,754	↓	1,352,592	↑
SK	SAS	2,053,931	↓	2.8%	2,845,623	↑	2,794,230	↑
AZ	Alitalia	1,826,102	↓	2.5%	2,285,368	↓	2,760,153	↑
KL	KLM	1,545,536	↓	2.1%	1,761,194	↑	1,635,048	↑
LX	SWISS	1,265,999	↓	1.7%	1,323,875	↑	1,244,011	↑
DY	Norwegian	1,216,607	↑	1.6%	1,028,081	↑	643,933	↑
EI	Aer Lingus	1,182,493	↑	1.6%	1,125,189	↑	1,017,572	↑
BE	FlyBE	1,123,600	↓	1.5%	1,185,451	↑	1,037,772	↑
X3	TUIfly.com	1,053,691	↓	1.4%	1,262,466	↓	1,530,499	↑
OS	Austrian	1,025,667	↓	1.4%	1,144,176	↓	1,150,666	↑
JK	Spanair	1,002,812	↓	1.4%	1,277,164	↓	1,403,172	↑
TP	TAP-Portugal	997,587	↓	1.3%	1,071,083	↑	931,494	↓
UX	Air Europa Lineas Aereas	892,738	↓	1.2%	965,665	↓	1,021,653	↑
A3	Aegean Airlines	882,761	↑	1.2%	758,156	↑	690,871	↑
OA	Olympic Airlines	838,406	↓	1.1%	845,944	↓	885,150	↑
AP	Air One	831,093	↓	1.1%	1,187,693	↑	1,109,831	↑
W6	Wizzair	828,360	↑	1.1%	662,220	↑	500,040	↑



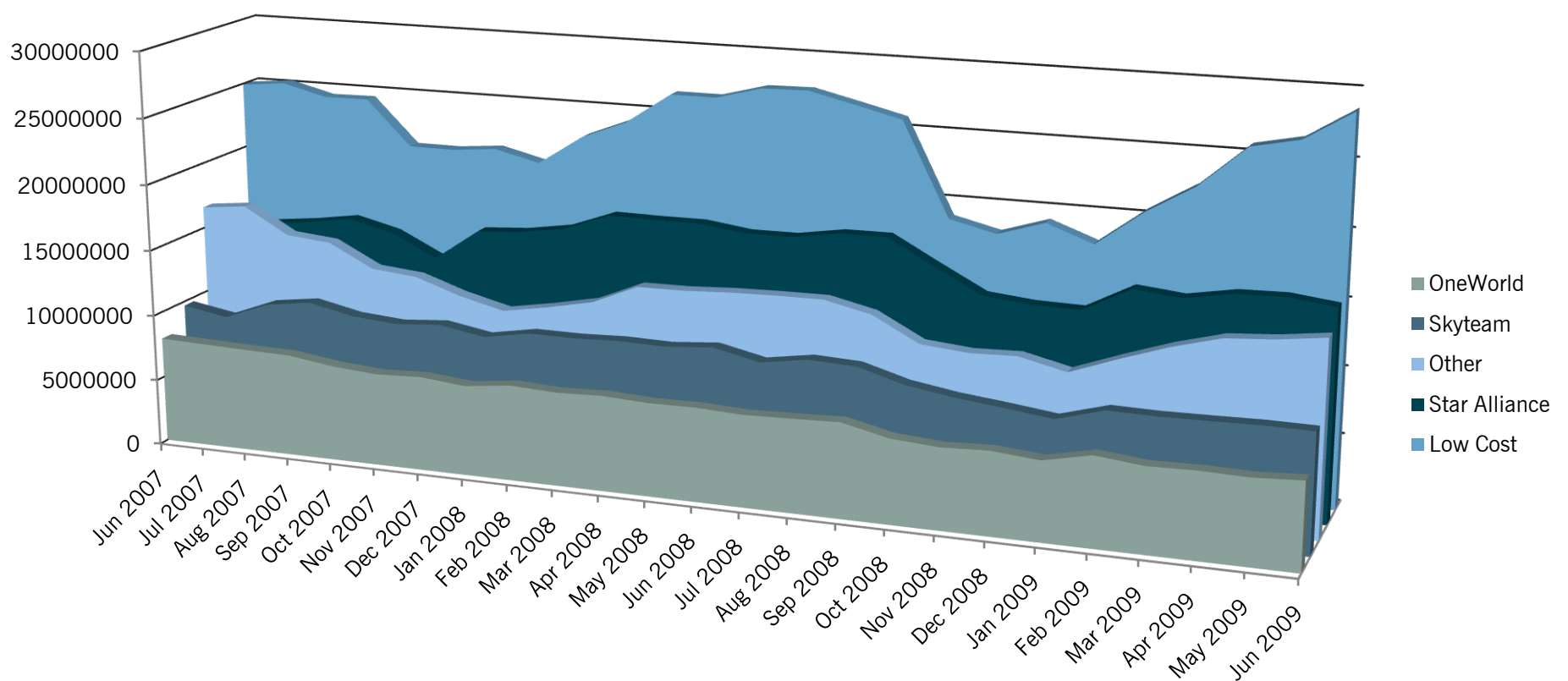
2009 Intra European Capacity Report, Current Month - July

Intra European Seats Available (000's)							
Carrier Type	July 2009	% of Market	Year to Date	% Growth		% of Market	2008 YTD
Low Cost	28,632	38.6%	160,669	(5.1%)	↓	35.0%	169,230
Star Alliance	15,687	21.2%	106,614	(10.3%)	↓	23.2%	118,794
Skyteam	8,871	12.0%	60,322	(15.2%)	↓	13.1%	71,173
OneWorld	6,498	8.8%	44,256	(10.2%)	↓	9.6%	49,300
Other	14,450	19.5%	87,754	1.7%	↑	19.1%	86,320
Total Seats	74,138		459,616	(7.1%)	↓		494,817




Intra European Sectors Flown							
Carrier Type	July 2009	% of Market	Year to Date	% Growth		% of Market	2008 YTD
Low Cost	177,588	29.8%	1,016,712	(3.2%)	↓	26.5%	1,050,164
Star Alliance	135,861	22.8%	938,245	(9.0%)	↓	24.4%	1,031,057
Skyteam	77,965	13.1%	528,569	(11.9%)	↓	13.8%	599,930
OneWorld	53,615	9.0%	370,731	(11.6%)	↓	9.7%	419,487
Other	151,128	25.4%	985,109	(4.0%)	↓	25.7%	1,025,900
Total Sectors	596,157		3,839,366	(7.0%)	↓		4,126,538

Intra European Average Aircraft Size							
Carrier Type	July 2009		Year to Date	% Growth			2008 YTD
Low Cost	161.2		158.0	(1.9%)	↓		161.1
Star Alliance	115.5		113.6	(1.4%)	↓		115.2
Skyteam	113.8		114.1	(3.8%)	↓		118.6
OneWorld	121.2		119.4	1.6%	↑		117.5
Other	95.6		89.1	5.9%	↑		84.1
European Ave AC Size	121.5		118.8	(0.4%)	↓		119.3




Airline Groupings By Seat Capacity



2009 Intra European Capacity Report, Current Month - July

2009				2008				2007			
Low Cost											
Destinations Served		313	19	↑	294		7		287		
Most Served Low Cost Airports and Seats Available											
STN	Stansted	6,908,062	(3.6%)	↓	STN	Stansted	7,164,729	STN	Stansted	8,630,899	
DUB	Dublin	6,353,026	5.2%	↑	DUB	Dublin	6,041,765	DUB	Dublin	5,372,338	
LGW	London Gatwick	5,204,145	31.4%	↑	LGW	London Gatwick	3,961,495	LGW	London Gatwick	3,172,366	
PMI	Palma De Mallorca	4,457,077	11.8%	↑	PMI	Palma De Mallorca	3,986,357	PMI	Palma De Mallorca	3,821,042	
BCN	Barcelona	4,213,375	(4.5%)	↓	BCN	Barcelona	4,413,369	BCN	Barcelona	3,880,272	
LTN	Luton	3,001,804	5.7%	↑	LTN	Luton	2,839,291	LTN	Luton	2,978,267	
MAD	Madrid	2,741,323	31.0%	↑	MAD	Madrid	2,092,299	MAD	Madrid	2,197,080	
CGN	Cologne	2,624,379	5.8%	↑	CGN	Cologne	2,480,822	CGN	Cologne	2,846,060	
TXL	Berlin	2,560,207	13.5%	↑	TXL	Berlin	2,256,118	TXL	Berlin	2,307,095	
DUS	Dusseldorf	2,511,013	13.1%	↑	DUS	Dusseldorf	2,219,361	DUS	Dusseldorf	2,095,853	
Star Alliance											
Destinations Served		257	(9)	↓	266		29		237		
Most Served Star Alliance Airports and Seats Available											
FRA	Frankfurt	10,093,332	11.2%	↑	FRA	Frankfurt	9,078,161	FRA	Frankfurt	10,379,084	
MUC	Munich	7,665,587	9.9%	↑	MUC	Munich	6,975,263	MUC	Munich	7,293,869	
IST	Istanbul	6,918,545	28.4%	↑	IST	Istanbul	5,386,306	IST	Istanbul	389,459	
ZRH	Zurich	4,521,589	5.6%	↑	ZRH	Zurich	4,282,299	ZRH	Zurich	4,598,475	
LHR	London Heathrow	3,813,192	4.6%	↑	LHR	London Heathrow	3,646,738	LHR	London Heathrow	4,182,358	
CPH	Copenhagen	3,759,675	(7.0%)	↓	CPH	Copenhagen	4,041,496	CPH	Copenhagen	4,297,223	
VIE	Vienna	3,755,935	(0.4%)	↓	VIE	Vienna	3,772,624	VIE	Vienna	4,068,786	
OSL	Oslo	3,147,039	(22.1%)	↓	OSL	Oslo	4,039,981	OSL	Oslo	4,424,075	
ARN	Stockholm	2,941,468	(7.7%)	↓	ARN	Stockholm	3,188,014	ARN	Stockholm	3,364,728	
LIS	Lisbon	2,894,933	14.2%	↑	LIS	Lisbon	2,535,968	LIS	Lisbon	2,573,455	
OneWorld											
Destinations Served		155	(11)	↓	166		(11)		177		
Most Served OneWorld Airports and Seats Available											
MAD	Madrid	8,216,577	2.2%	↑	MAD	Madrid	8,035,864	MAD	Madrid	8,953,549	
LHR	London Heathrow	6,706,470	16.0%	↑	LHR	London Heathrow	5,779,909	LHR	London Heathrow	7,895,183	
HEL	Helsinki	2,712,159	10.5%	↑	HEL	Helsinki	2,454,925	HEL	Helsinki	2,887,678	
LGW	London Gatwick	2,052,319	(5.9%)	↓	LGW	London Gatwick	2,181,147	LGW	London Gatwick	3,159,791	
BCN	Barcelona	1,839,929	(10.4%)	↓	BCN	Barcelona	2,052,348	BCN	Barcelona	4,231,198	
BUD	Budapest	1,437,845	16.8%	↑	BUD	Budapest	1,230,804	BUD	Budapest	924,810	
AMS	Amsterdam	702,476	2.6%	↑	AMS	Amsterdam	684,528	AMS	Amsterdam	830,726	
VLC	Valencia	682,377	1.1%	↑	VLC	Valencia	675,017	VLC	Valencia	790,326	
FCO	Rome	559,929	12.5%	↑	FCO	Rome	497,755	FCO	Rome	666,919	
EDI	Edinburgh	550,617	(3.8%)	↓	EDI	Edinburgh	572,419	EDI	Edinburgh	841,882	
Skyteam											
Destinations Served		170	1	↑	169		4		165		
Most Served Skyteam Airports and Seats Available											
CDG	Paris	8,270,835	4.4%	↑	CDG	Paris	7,925,373	CDG	Paris	8,710,150	
AMS	Amsterdam	6,172,051	9.3%	↑	AMS	Amsterdam	5,645,316	AMS	Amsterdam	6,005,354	
FCO	Rome	5,140,841	(0.9%)	↓	FCO	Rome	5,188,873	FCO	Rome	5,608,004	
ORY	Paris	4,304,427	(1.8%)	↓	ORY	Paris	4,383,111	ORY	Paris	4,916,063	
MAD	Madrid	2,024,966	0.8%	↑	MAD	Madrid	2,009,024	MAD	Madrid	843,553	
LIN	Milan	1,902,813	13.8%	↑	LIN	Milan	1,671,968	LIN	Milan	1,789,757	
PRG	Prague	1,769,027	(14.7%)	↓	PRG	Prague	2,073,977	PRG	Prague	2,291,075	
LYS	Lyon	1,650,182	2.3%	↑	LYS	Lyon	1,613,399	LYS	Lyon	1,688,211	
BCN	Barcelona	1,554,067	(1.2%)	↓	BCN	Barcelona	1,573,091	BCN	Barcelona	881,903	
TLS	Toulouse	1,354,108	2.9%	↑	TLS	Toulouse	1,316,415	TLS	Toulouse	1,460,085	

2009 Intra European Capacity Report, Current Month - July

Low Cost		2009 YTD					2008 YTD		
Growth	Airline	Seats	Sectors	Aircraft Size		Seats	Sectors	Aircraft Size	
↑	Ryanair	43,698,690	↑ 231,210	↑ 189	↔	40,797,918	215,862	189	
↑	easyJet	27,090,133	↑ 173,968	↓ 156	↑	27,082,458	174,617	155	
↓	airberlin	18,034,589	↓ 109,786	↓ 164	↑	18,352,244	112,861	163	
↑	Norwegian	7,827,009	↑ 51,439	↑ 152	↑	6,075,501	40,472	150	
↑	Aer Lingus	7,550,251	↑ 41,453	↑ 182	↓	7,419,265	40,315	184	
↓	FlyBE	7,069,966	↓ 91,451	↓ 77	↔	7,200,304	93,077	77	
↓	TUIfly.com	5,266,480	↓ 35,061	↓ 150	↓	6,991,196	40,718	172	
↑	Wizzair	4,808,520	↑ 26,714	↑ 180	↔	4,005,360	22,252	180	
↓	Germanwings	4,757,772	↓ 34,084	↓ 140	↓	5,182,828	36,327	143	
↓	Clickair	4,203,000	↓ 23,350	↓ 180	↔	5,490,720	30,504	180	
STAR ALLIANCE  THE WAY THE EARTH CONNECTS									
Star Alliance		2009 YTD					2008 YTD		
Growth	Airline	Seats	Sectors	Aircraft Size		Seats	Sectors	Aircraft Size	
↓	Lufthansa	37,284,024	↓ 340,446	↓ 110	↑	38,234,011	368,503	104	
↓	SAS	17,526,512	↓ 154,187	↓ 114	↓	24,138,441	183,721	131	
↑	Turkish Airlines	15,486,445	↑ 93,892	↑ 165	↑	14,048,498	85,952	163	
↓	SWISS	8,136,992	↓ 69,704	↑ 117	↓	8,840,777	67,617	131	
↓	TAP-Portugal	6,410,927	↓ 53,067	↓ 121	↑	7,082,155	59,154	120	
↓	Austrian	6,328,574	↓ 74,494	↓ 85	↓	7,308,602	83,009	88	
↓	Spanair	6,079,583	↓ 41,140	↓ 148	↑	8,452,917	59,096	143	
↓	bmi	3,645,144	↓ 39,201	↓ 93	↓	4,458,020	45,930	97	
↓	LOT - Polish Airlines	2,741,112	↓ 42,242	↓ 65	↓	3,311,324	47,842	69	
↑	Croatia Airlines	1,939,324	↑ 15,384	↓ 126	↑	1,842,696	15,405	120	
oneworld 									
OneWorld		2009 YTD					2008 YTD		
Growth	Airline	Seats	Sectors	Aircraft Size		Seats	Sectors	Aircraft Size	
↓	Iberia	18,922,693	↓ 174,347	↓ 109	↓	22,067,322	194,231	114	
↓	British Airways	17,424,426	↓ 121,919	↓ 143	↑	18,950,523	152,245	124	
↓	Finnair	5,207,263	↓ 44,709	↓ 116	↓	5,526,328	44,745	124	
↑	Malev Hungarian Airlines	2,565,356	↑ 29,159	↑ 88	↓	2,545,561	27,228	93	
SKYTEAM 									
Skyteam		2009 YTD					2008 YTD		
Growth	Airline	Seats	Sectors	Aircraft Size		Seats	Sectors	Aircraft Size	
↓	Air France	28,356,396	↓ 276,302	↓ 103	↓	32,372,854	297,608	109	
↓	Alitalia	11,782,462	↓ 81,267	↓ 145	↑	16,320,084	121,497	134	
↓	KLM	11,007,756	↓ 96,710	↓ 114	↑	11,647,280	103,877	112	
↓	Air Europa Lineas Aereas	5,924,835	↓ 33,197	↓ 178	↓	6,616,323	35,893	184	
↓	CSA	3,175,390	↓ 40,836	↓ 78	↓	4,216,832	41,055	103	
Other		2009 YTD					2008 YTD		
Growth	Airline	Seats	Sectors	Aircraft Size		Seats	Sectors	Aircraft Size	
↓	Air One	6,603,022	↓ 45,072	↓ 146	↑	7,710,164	57,775	133	
↑	Aegean Airlines	5,469,284	↑ 35,430	↑ 154	↑	4,492,342	31,725	142	
↓	Olympic Airlines	4,983,068	↓ 52,770	↓ 94	↓	5,375,592	56,604	95	
↑	Meridiana	4,276,677	↑ 31,095	↑ 138	↑	3,932,416	30,722	128	
↓	Brussels Airlines	4,191,677	↓ 38,397	↓ 109	↑	4,546,226	43,159	105	
↑	Wideroe	4,114,213	↑ 93,437	↓ 44	↑	3,839,584	95,815	40	
↑	Pegasus Hava Tasimaciligi	3,323,876	↑ 19,409	↑ 171	↑	3,006,852	18,253	165	
↓	Monarch Airlines	2,748,105	↓ 12,781	↓ 215	↑	2,788,027	13,080	213	
↓	Condor Flugdienst	2,492,688	↓ 11,824	↓ 211	↑	3,041,846	14,978	203	
↑	Sunexpress	2,460,076	↑ 14,290	↑ 172	↓	1,984,458	10,371	191	



Livening up airports.

20 routes



in 2004



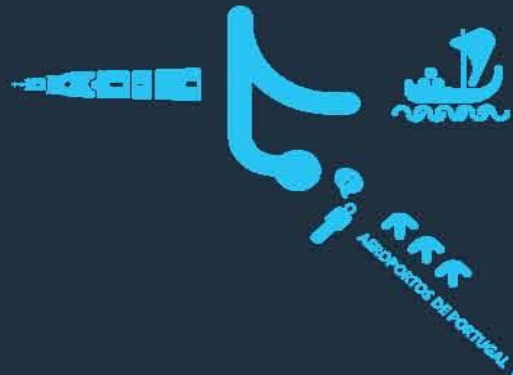
43 in 2008



We must



be doing



something right



Not only **Porto Airport** has been considered the Best European Airport in 2007, but also the region's response to the increasing traffic has been deeply enthusiastic. Thus, we can only dream of what the future may bring. Hopefully your Airline!

ANZ Aeroportos
Porto
Livening up airports.