

# Düsseldorf International – Next Generation Hub™

Düsseldorf  
International 

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# 6 th Annual Airneth Conference 2012

## Agenda:

- *Location and Standing of Düsseldorf International*
- Transforming Düsseldorf into a Hub
- The Drivers of the “Next Generation Hub™” at Düsseldorf International
- Targets & Outlook





## Düsseldorf International Airport in Summer 2012

- More than 180 destinations in around 50 countries
- Some 60 airlines operating regular services to DUS
- Over 100 weekly long-haul flights
- On Average more than 600 movements per day
- 20.3 million passengers in 2011

# Passengers at Germany's Top10 Airports 2011 and 2010

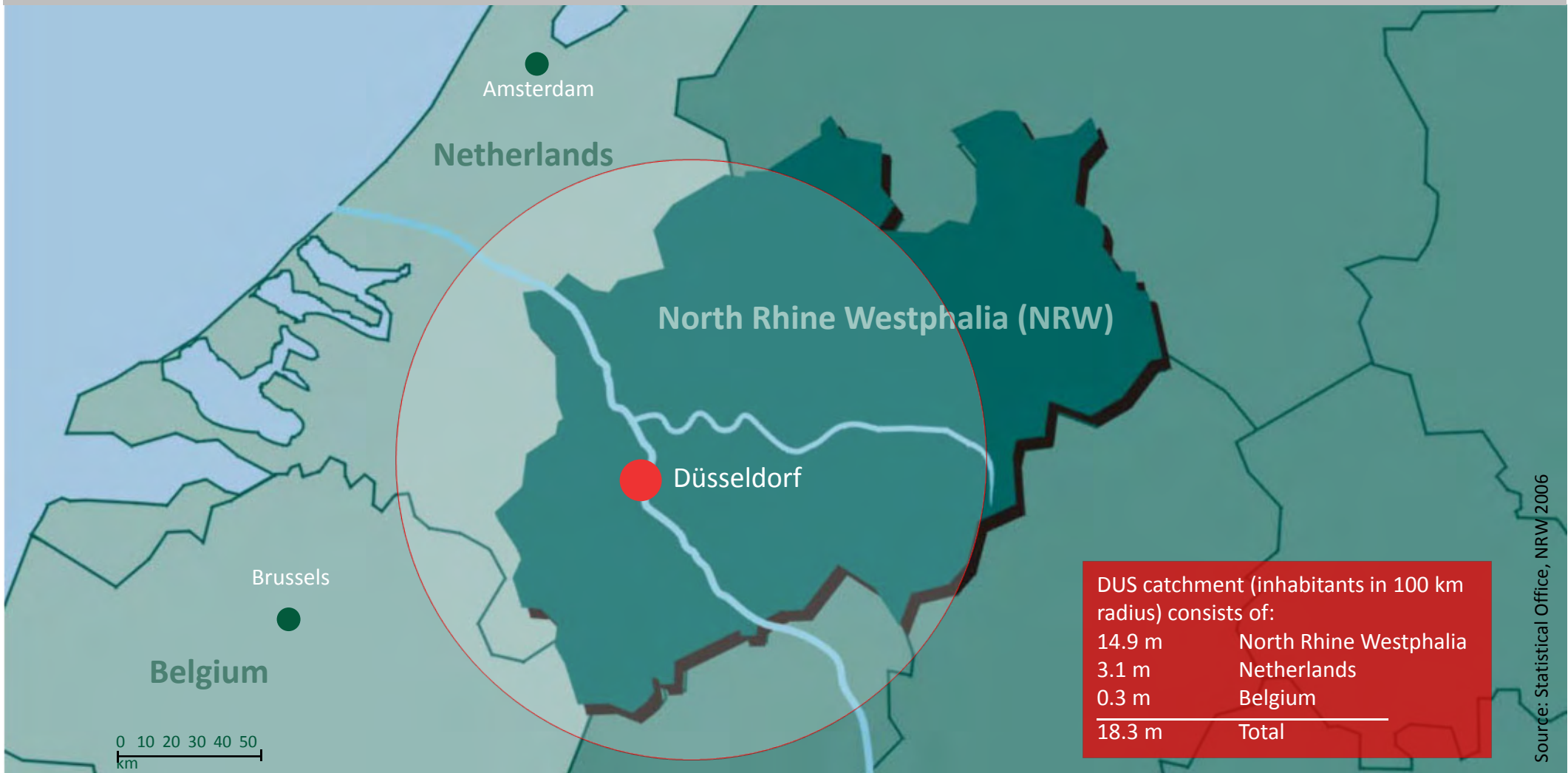
Record year for Düsseldorf and one of the best performing German airports

Airport	2011	2010
1. Frankfurt	56.4m (+ 6.5%)	53.0m (+ 4.1%)
2. Munich	37.7m (+ 8.8%)	34.7m (+ 6.2%)
3. Düsseldorf	20.3m (+ 7.1%)	19.0m (+ 6.7%)
4. Berlin-Tegel	16.9m (+12.6%)	15.0m (+ 6.0%)
5. Hamburg	13.5m (+ 4.6%)	13.0m (+ 6.0%)
6. Cologne/Bonn	9.6m (- 2.3%)	9.8m (+ 1.1%)
7. Stuttgart	9.5m (+ 4.0%)	9.2m (+ 3.2%)
8. Berlin-Schönefeld	7.1m (- 2.5%)	7.3m (+ 7.4%)
9. Hanover	5.3m (+ 5.5%)	5.1m (+ 1.8%)
10. Nuremberg	3.9m (- 2.6%)	4.1m (+ 2.6%)
<b>All German Airports</b>	<b>199.2m (+ 4.8%)</b>	<b>190.1m (+ 4.7%)</b>

Source: Association of German Airports (ADV) 2011 and 2010

# Catchment Area of Düsseldorf International

Three countries within the catchment area – quite unique in Europe



Source: Statistical Office, NRW 2006

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# Our goal: Connecting the Rhine-Ruhr Region with Worldwide Business Regions



# Next Generation Hub - Changing the O&D airport into Germany's newest hub

A new terminal concept was necessary

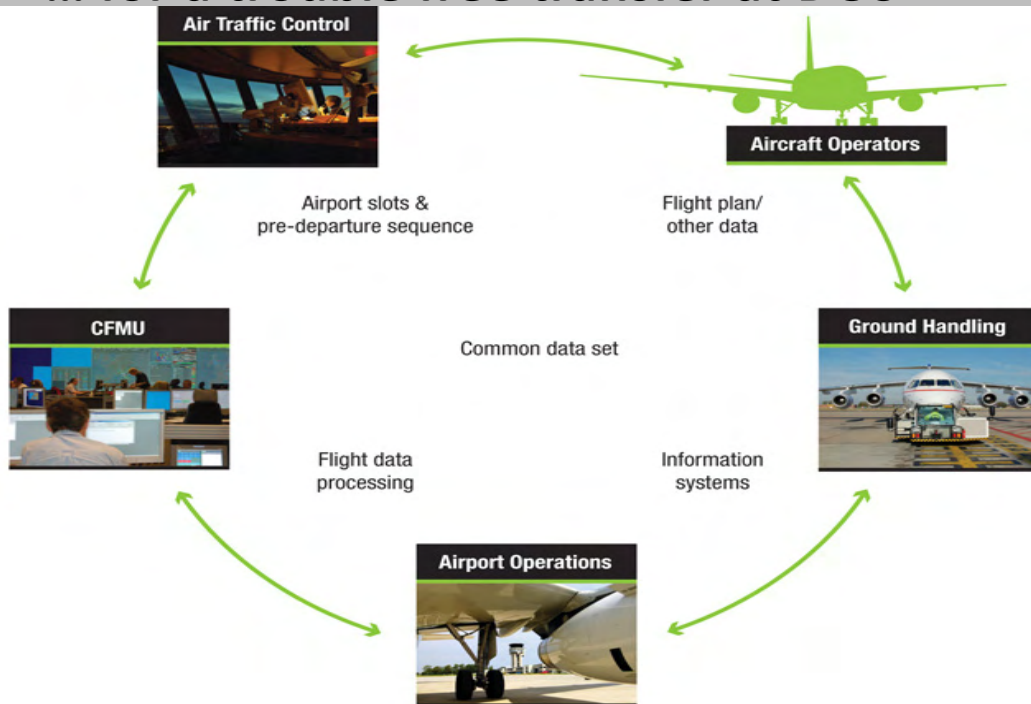




# Enhancements to the airside Infrastructure

- Investment into baggage sorting system
- Additional bus gates
- New maintenance hangar 7
- Establishing A-CDM and ACC

... for a trouble free transfer at DUS



# Reshaping the Piers A,B,C

- New Transferwalkways in pier A
  - Additional security- and passport control facilities
  - Airside walkway between piers B+C
- ... for an easy and fast transfer at DUS**



## Reshaping the exclusive waiting areas

- Enlarging the existing common user- and airline lounges
- New exclusive lounge for Emirates
- New design and enlarging the VIP area  
... for a relaxing transfer at DUS



# Shopping up to the Gate

- 8.900 m<sup>2</sup> retail offers in 62 shops
  - More than 60 well know international brands
  - 3.500 m<sup>2</sup> of duty free shops
- ... for an exiting transfer at DUS



# Fresh food and Cool drinks while Transferring

- 8.000 m<sup>2</sup> of restaurants and bars
  - Unique: An airside bakery in pier C
  - From fast-food to gourmet-cuisine: Something for everyone
- ... for a satisfying transfer at DUS



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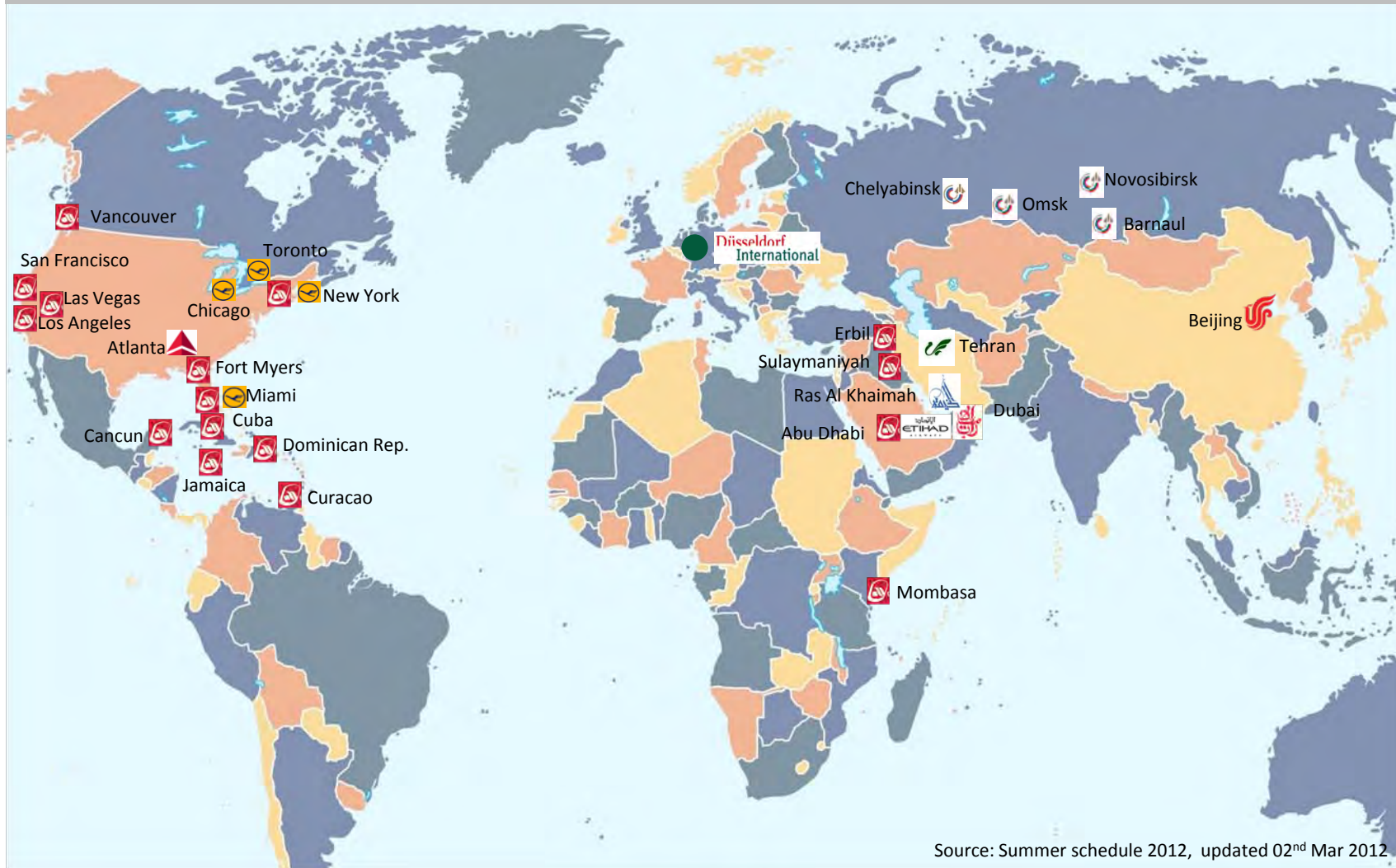
# Next Generation Hub – Multiple Hub System

The two major German Airlines operate a hub system at Düsseldorf



# Intercontinental Non Stop Services

More than 100 weekly departures ex DUS to intercontinental destinations



-  Air Berlin (AB)
-  Lufthansa (LH)
-  Emirates (EK)
-  Etihad (EY)
-  Delta (DL)
-  Air China (CA)
-  Mahan Air (W5)
-  Orenair (R2)
-  RAK Airways (RT)

Source: Summer schedule 2012, updated 02<sup>nd</sup> Mar 2012



## Lufthansa develops Düsseldorf as their third German hub

- Base for longhaul aircraft (A340-300)
- Significant improvements regarding the capacity on German domestic and Europe services by enlarging the based aircraft in DUS
- Other Star Alliance Members follow: Air China und TAP Portugal



# Lufthansa develops Düsseldorf as their third German hub

Back in 2004, Lufthansa offered some 37 destinations non stop...



Quelle: Flughafen Düsseldorf GmbH



# Star Alliance Services at Düsseldorf International

Some 86 cities served ex DUS – playing in the premier league



## Düsseldorf is one of the most important airports for Air Berlin

- 1992 – 1997: Charterairline for „warm water destinations“
- 1998 – 2005: Mallorca- und City-Shuttle
- 2006 – 2010: Scheduled Services and takeover of dba, LTU, TUIfly Cityshuttle
- 2011: Code Sharing with oneworld airlines, e.g. AA, BA, AY, IB  
Etihad purchased 30% of Air Berlin, started codesharing
- Since 22.3.2012 Air Berlin is a full member of the oneworld alliance



# Düsseldorf is one of the most important airports for Air Berlin

Coming from four different airlines with independent business models...



Quelle: Flughafen Düsseldorf GmbH

# Düsseldorf is one of the most important airports for Air Berlin

Air Berlin is now the second largest German airline, defining itself as hybrid

- Reykjavik
- Vancouver
- San Francisco
- Las Vegas
- Los Angeles
- New York
- Fort Myers
- Miami
- Cancun
- Cuba
- Jamaica
- Dominican Republic
- Curacao
- Mombasa



Source: Flughafen Düsseldorf GmbH, summer schedule 2012, updated 02<sup>nd</sup> Mar 2012

# Oneworld services at Düsseldorf International

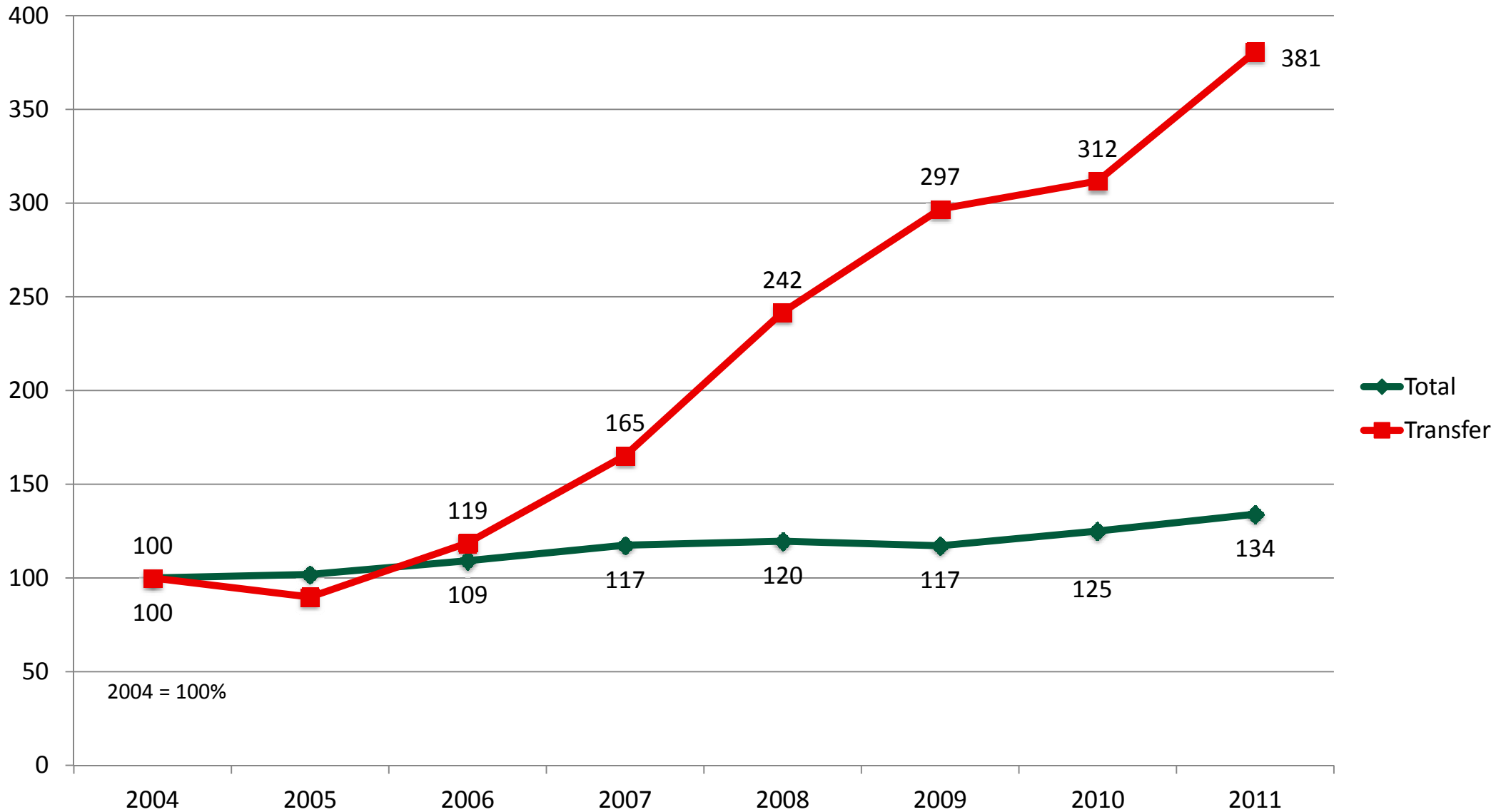
Germany and Europe well covered – but still room for improvements



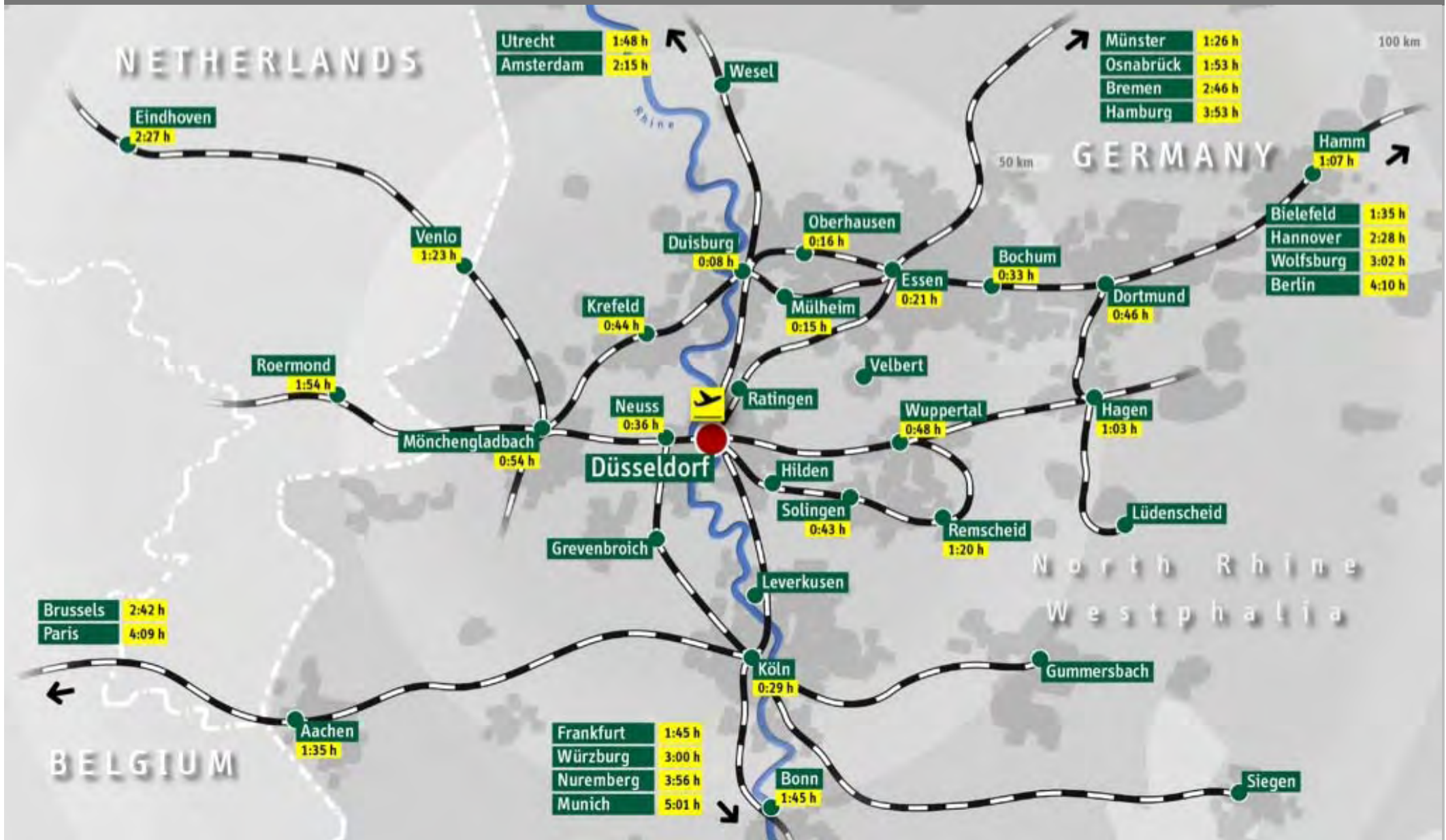


# The hub strategy pays off in DUS

Transfer passengers as the key growth factor



# Train Access: Convenient connections to many cities in Germany and the Netherlands



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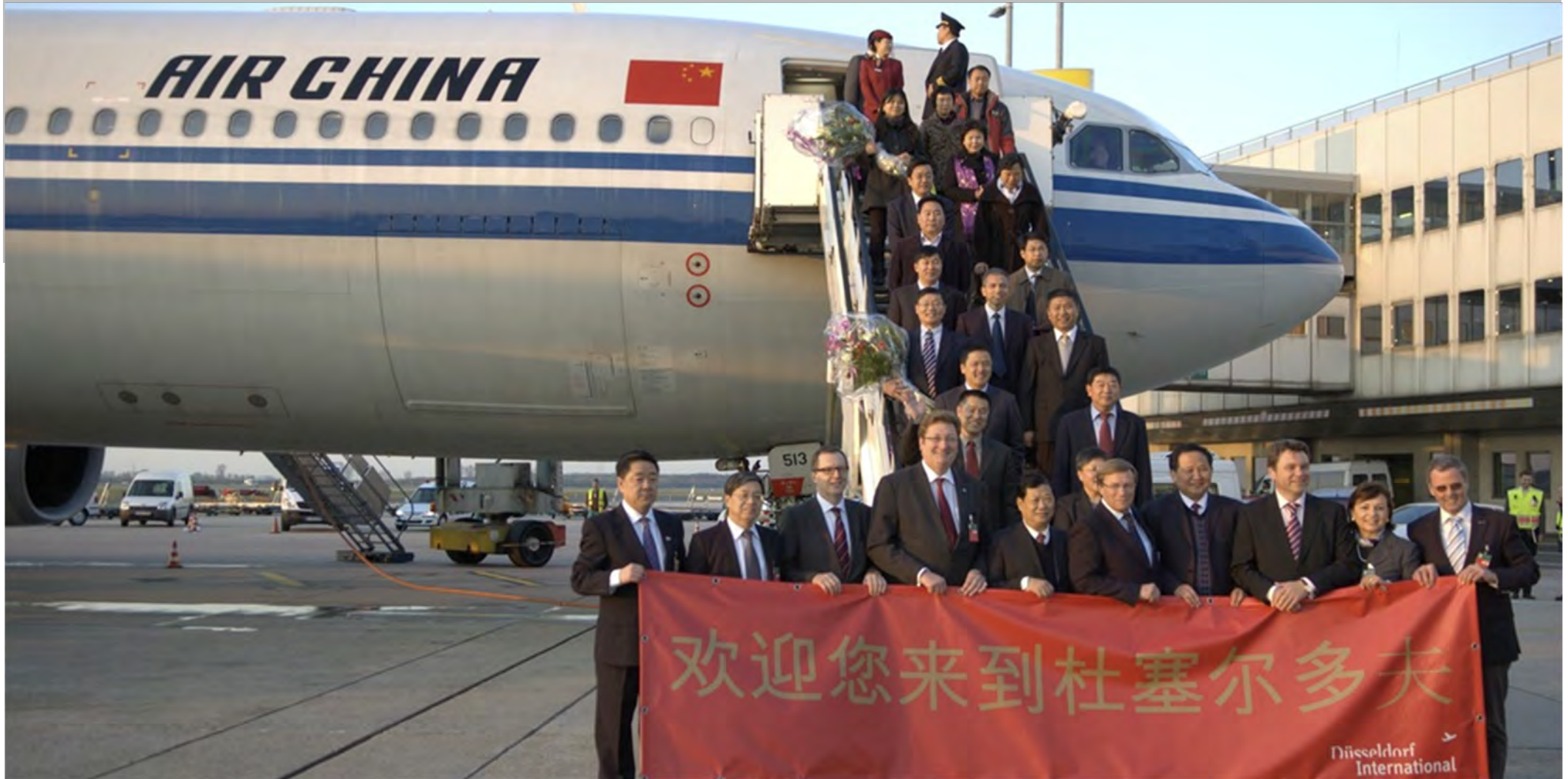
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## Targets & Outlook - Route Development

- More intercontinental routes with focus on far east, e.g. Shanghai, Hongkong, Tokyo, Delhi and Mumbai



## Targets & Outlook - Airlines

Development of the route network in cooperation with our airline partner:

- 1) Route development together with the prime hub airlines Air Berlin and Lufthansa
- 2) Route development by associated alliance carriers of Star Alliance and/or oneworld
- 3) Continue the „Hub-to-Hub-Strategy“, meaning more longhaul services from the hub Düsseldorf into another intercontinental hub, e.g.
  - with alliance associated airlines such as Delta Air Lines to Atlanta
  - independant airlines such as Emirates to Dubai or Etihad to Abu Dhabi



# Targets & Outlooks - Evolution of the Next Generation Hub™

- Increase the transfer rate from 10% to 15%
- Additional gates in Pier A
- Additional aircraft parking positions
- Redesign of common user lounge in pier B
- Enlargement of Lufthansa lounges in pier A
- easyPass immigration lines in pier A and C



Foto by Fraport



# Düsseldorf International

Thank you for your attention. Questions?

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