

Russia focus

Russia Focus

BUSINESS AVIATION **SPECIAL INSIGHT** 2014 – Review [JAN–AUG]

WINGX Advance provides official statistics to:



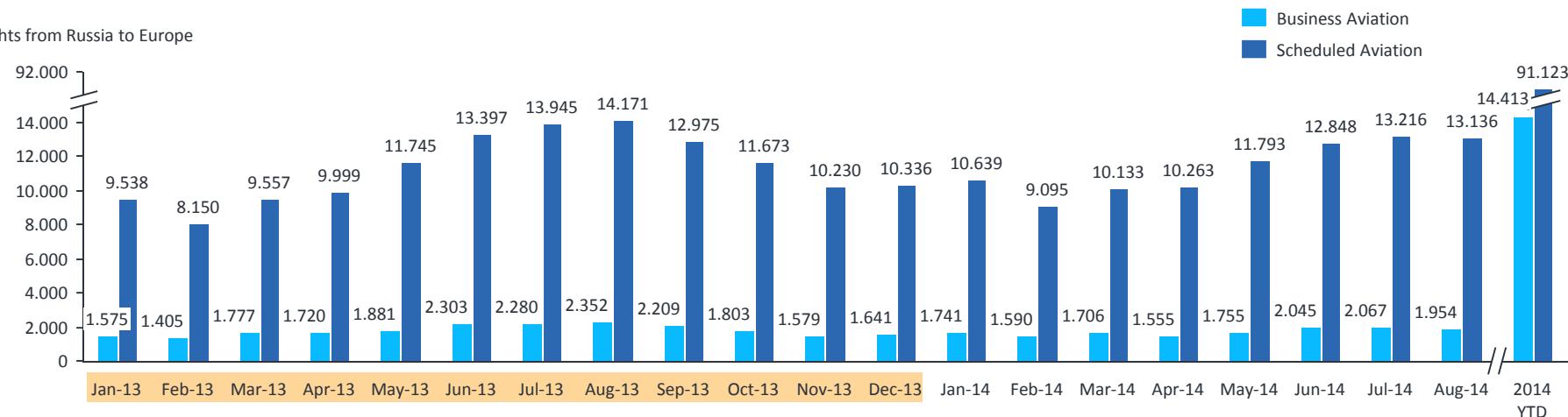
Source: Fotolia

Business Aviation & Airline Flights from Russia to Europe

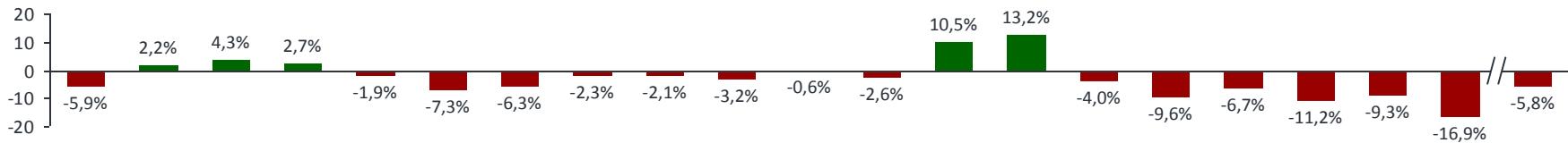
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Business aviation flights from Russia to Europe have fallen 6% YTD, with an increasingly negative trend since March. Scheduled aviation is being affected to a lesser extent.

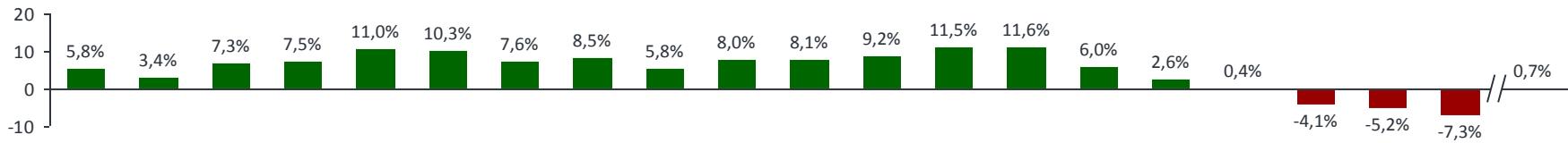
Flights from Russia to Europe



YOY Business Aviation



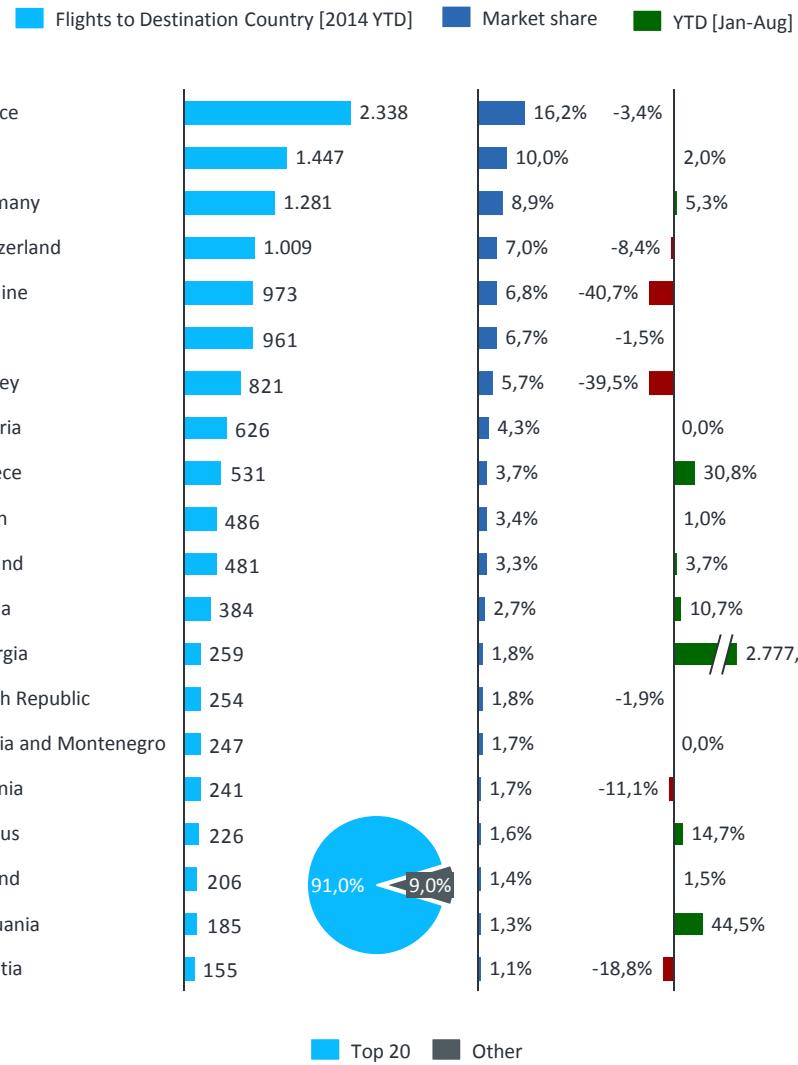
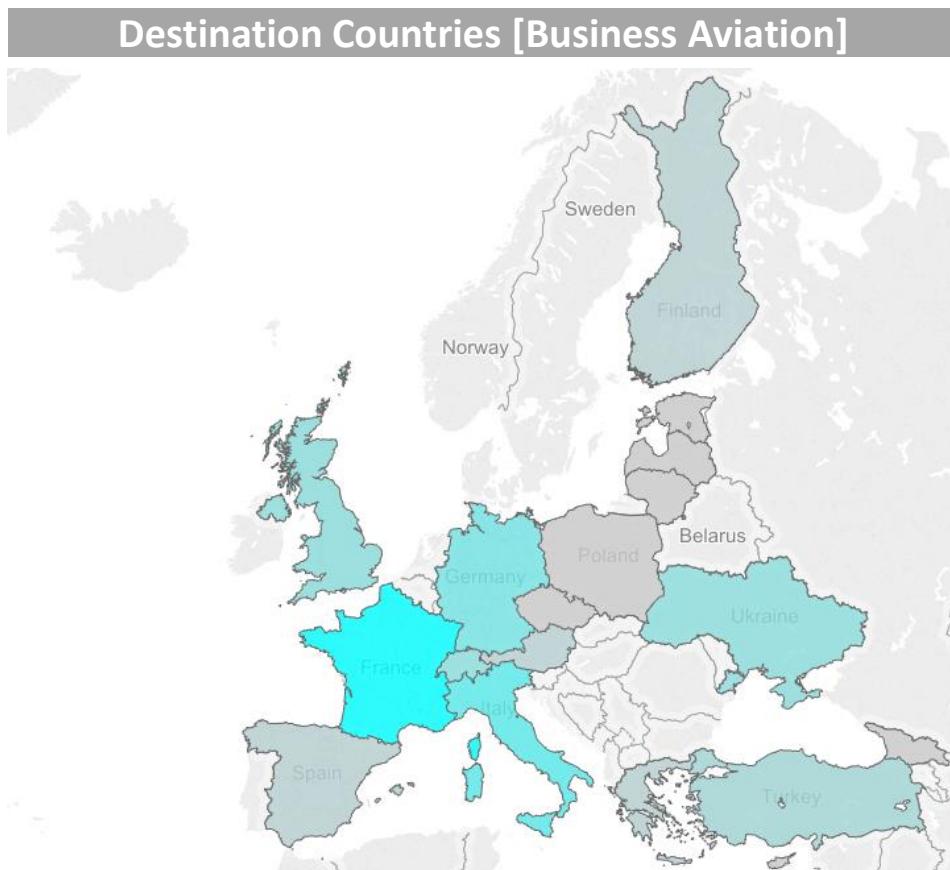
YOY Scheduled Aviation



Business Aviation only: Origin Russia, Destination Europe

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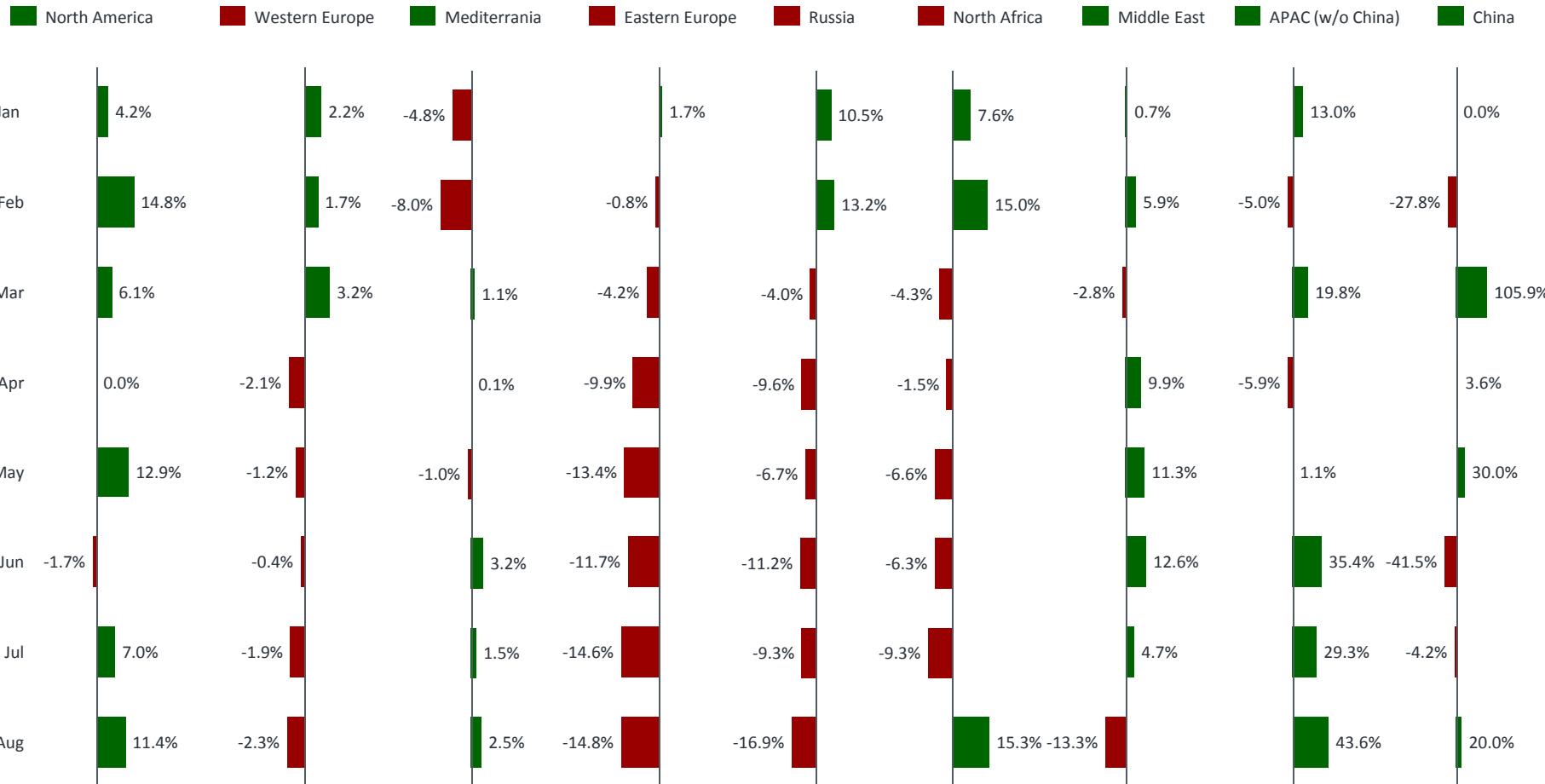
Outbound to Western Europe so far little affected, apart from Switzerland. Flights to Ukraine have collapsed. Flights to Turkey also well down. Flights to Greece well up.



Regional business aviation flight pattern into Europe (YOY)

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The Ukraine crisis has accelerated declines of inbound activity from Russia and Eastern Europe. Activity within Western Europe also affected. Flights from North America and Africa are up YOY.



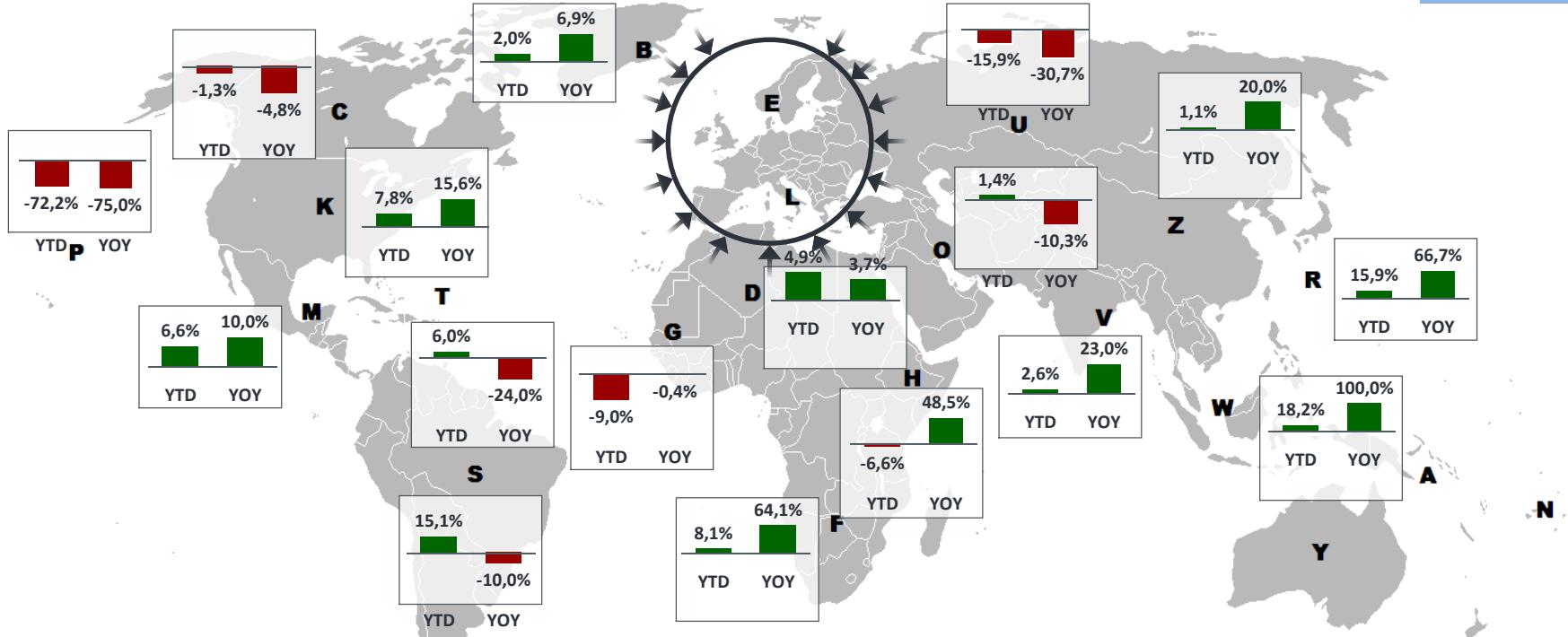
Based on total monthly departures

Global business aviation flight pattern into Europe (YTD/YOY)

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The effect of the Ukraine crisis is evident in the 31% slump in inbound traffic from ICAO region U. Region O may also have been affected. Region K is more active YTD.

August 2014



| Origin Regions | YTD departures | YTD growth | YOY growth |
|----------------|----------------|------------|------------|
| U-Region | 25,300 | -15.9% | -30.7% |
| K-Region | 5,592 | 7.8% | 15.6% |
| O-Region | 4,794 | 1.4% | -10.3% |
| G-Region | 2,623 | -9.0% | -0.4% |
| D-Region | 1,668 | 4.9% | 3.7% |
| H-Region | 1,358 | -6.6% | 48.5% |

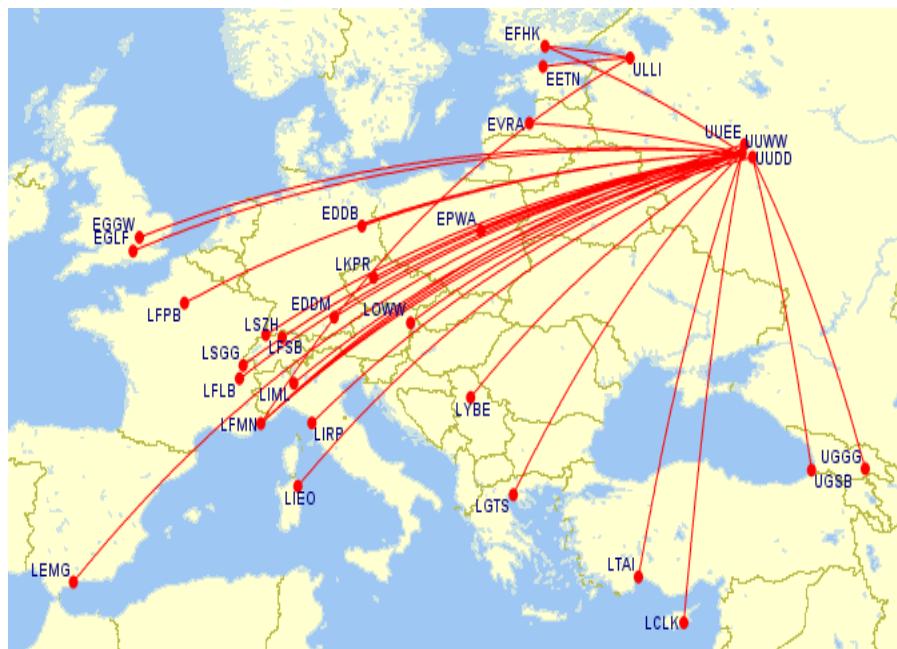
| Origin Regions | YTD departures | YTD growth | YOY growth |
|----------------|----------------|------------|------------|
| C-Region | 1,112 | -1.3% | -4.8% |
| B-Region | 938 | 2.0% | 6.9% |
| F-Region | 475 | 2.6% | 23.0% |
| V-Region | 469 | 8.1% | 64.1% |
| T-Region | 353 | 6.0% | -24.0% |
| S-Region | 351 | 15.1% | -10.0% |

| Origin Regions | YTD departures | YTD growth | YOY growth |
|----------------|----------------|------------|------------|
| M-Region | 276 | 6.6% | 10.0% |
| Z-Region | 191 | 1.1% | 20.0% |
| R-Region | 73 | 15.9% | 66.7% |
| W-Region | 52 | 18.2% | 100.0% |
| P-Region | 5 | -72.2% | -75.0% |
| Total | 45,630 | -8.9% | -18.3% |

Top 30 bizav city pair connections from Russia, YTD 2014

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Notably city pair declines include Vnukovo outbound to Geneva, Zurich, Luton, whereas traffic has increased from Vnukovo to Le Bourget, Farnborough, Vienna, Riga.

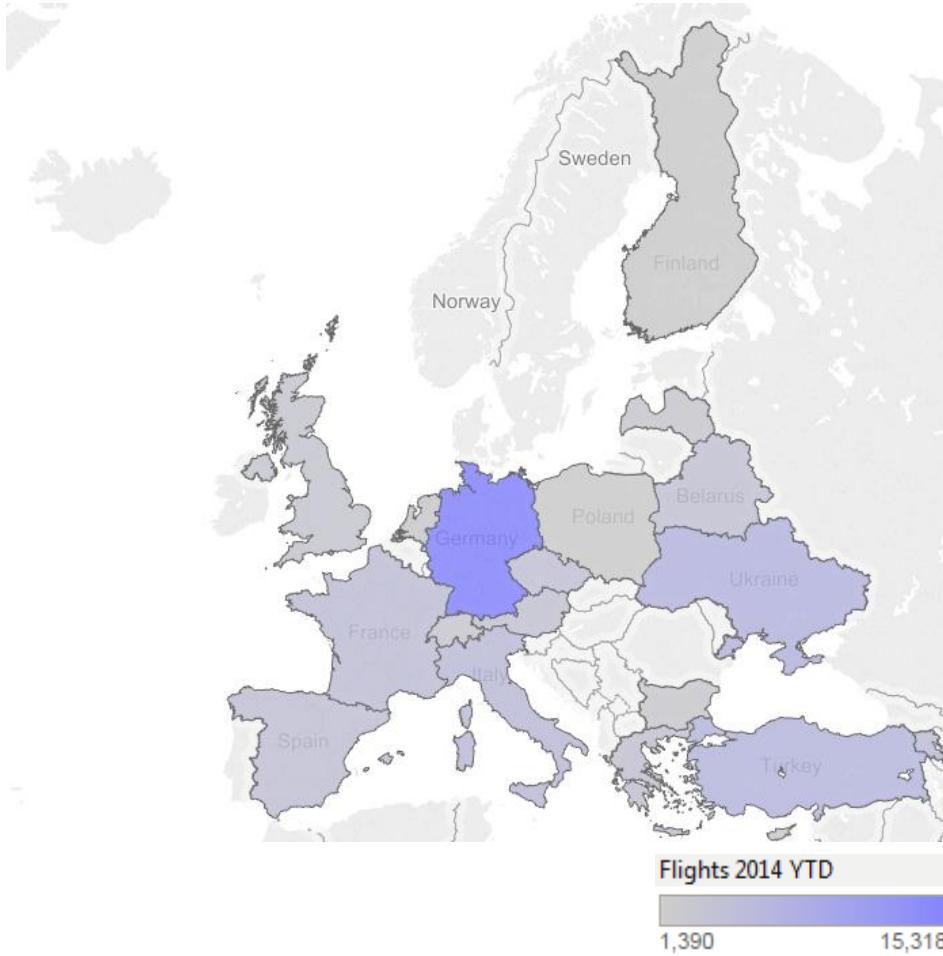


| | Flights 2014 [YTD] | YTD [Jan-Aug] | +/- (2014 vs 2013) |
|-----------|--------------------|---------------|--------------------|
| UUWW-LFMN | 854 | 3,9% | 32 |
| UUWW-LSGG | 259 | -15,9% | -49 |
| UUWW-LFPB | 244 | 8,9% | 20 |
| UUWW-EVRA | 227 | 18,2% | 35 |
| UUWW-LOWW | 221 | 22,1% | 40 |
| UUWW-EGLF | 221 | 44,4% | 68 |
| UUWW-EGGW | 194 | -15,7% | -36 |
| UUWW-LIEO | 188 | 20,5% | 32 |
| UUWW-LSZH | 182 | -14,2% | -30 |
| ULLI-EFHK | 177 | -4,8% | -9 |
| UUWW-LIRP | 159 | 3,9% | 6 |
| UUWW-LIML | 144 | 22,0% | 26 |
| UUWW-EDDM | 142 | 32,7% | 35 |
| UUWW-EFHK | 140 | 22,8% | 26 |
| UUWW-EDDB | 132 | 34,7% | 34 |
| UUWW-LCLK | 130 | 28,7% | 29 |
| UUEE-LFMN | 128 | -20,0% | -32 |
| UUWW-LFLB | 124 | 29,2% | 28 |
| ULLI-EETN | 108 | -18,8% | -25 |
| UUDD-UGGG | 107 | 0,0% | 107 |
| UUWW-LTAI | 102 | 3,0% | 3 |
| UUWW-LKPR | 102 | 12,1% | 11 |
| UUWW-LFSB | 101 | 4,1% | 4 |
| UUWW-LEMG | 97 | 0,0% | 0 |
| ULLI-LFMN | 96 | -20,7% | -25 |
| UUWW-LYBE | 94 | 5,6% | 5 |
| UUWW-EPWA | 85 | 4,9% | 4 |
| UUWW-LGTS | 79 | 1,3% | 1 |
| UUDD-UGSB | 79 | 0,0% | 0 |
| UUDD-LFMN | 78 | -14,3% | -13 |

Scheduled Aviation (airline): Origin Russia, Destination Europe WINGX

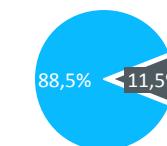
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By far the primary outbound destination for airline flights from Russia is Germany, stable YOY. Clearly airline links to Turkey are replacing some bizav on the same city pairs.

Destination Countries [Scheduled Aviation]



Flights to Destination Country [2014 YTD] Market share YTD [Jan-Aug]

| | | | |
|-----------------------|--------|-------|----------|
| Germany | 15.318 | 16,8% | 1,2% |
| Ukraine | 6.766 | 7,4% | -43,8% / |
| Turkey | 6.397 | 7,0% | 27,5% |
| Italy | 5.457 | 6,0% | 1,0% |
| Armenia | 5.000 | 5,5% | 32,8% |
| France | 4.550 | 5,0% | 2,9% |
| Czech Republic | 4.145 | 4,5% | -2,3% / |
| Spain | 3.975 | 4,4% | 12,2% |
| Belarus | 3.635 | 4,0% | 9,0% |
| Greece | 3.535 | 3,9% | 4,9% |
| Austria | 3.524 | 3,9% | 2,6% |
| UK | 2.774 | 3,0% | 6,2% |
| Serbia and Montenegro | 2.387 | 2,6% | 12,1% |
| Latvia | 2.371 | 2,6% | 5,1% |
| Switzerland | 2.320 | 2,5% | 4,5% |
| Bulgaria | 1.973 | 2,2% | 14,0% |
| Netherlands | 1.879 | 2,1% | 18,0% |
| Cyprus | 1.755 | 1,9% | 14,8% |
| Finland | 1.507 | 1,7% | 33,5% |
| Poland | 1.390 | 1,5% | -4,5% / |



Top 20 Other

Top 30 SCHED city pair connections from Russia, YTD 2014

On a city pair basis, Sheremetyevo-Prague shows decline, otherwise flight volumes up YOY, significantly from UUEE to Amsterdam, Belgrade and Ataturk

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| | Flights 2014 [YTD] | YTD [Jan-Aug] | +/- (2014 vs 2013) |
|-----------|--------------------|---------------|--------------------|
| UUEE-LFPG | 2,441 | 2,5% | 59 |
| UUEE-LKPR | 1,929 | -4,4% | -88 |
| UUDD-EDDM | 1,650 | 4,2% | 67 |
| UUEE-EHAM | 1,468 | 26,3% | 306 |
| UUEE-EDDF | 1,454 | 3,9% | 55 |
| UUEE-LIRF | 1,327 | -0,5% | -7 |
| UUDD-LOWW | 1,276 | 2,0% | 25 |
| UUWW-LTBA | 1,212 | 25,1% | 243 |
| UUEE-LIMC | 1,155 | -3,6% | -43 |
| UUDD-EDDF | 1,003 | -8,2% | -89 |
| UUEE-LTBA | 972 | 7,5% | 68 |
| UUEE-EVRA | 970 | -0,1% | -1 |
| UUEE-LYBE | 970 | 36,2% | 258 |
| UUEE-EDDB | 967 | 0,5% | 5 |
| UUDD-LYTV | 966 | 12,7% | 109 |
| UUEE-EPWA | 942 | -10,0% | -105 |
| ULLI-EDDF | 934 | 2,9% | 26 |
| UUEE-EDDM | 902 | 24,2% | 176 |
| UUDD-LEBL | 807 | 16,8% | 116 |
| UUEE-LEBL | 751 | 18,1% | 115 |
| UUEE-LOWW | 731 | 0,8% | 6 |
| UUEE-EDDL | 727 | 0,4% | 3 |
| ULLI-EDDM | 720 | 5,4% | 37 |
| UUDD-EGLL | 712 | -11,6% | -93 |
| UUEE-EGLL | 692 | 0,1% | 1 |
| UUEE-EKCH | 691 | 1,0% | 7 |
| UUWW-EDDF | 686 | 13,2% | 80 |
| UUDD-EDDT | 678 | 4,8% | 31 |
| ULLI-LFPG | 671 | 5,3% | 34 |
| UUEE-ESSA | 660 | -4,8% | -33 |