WINGX ADVANCE

September 2013

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BUSINESS AVIATION MONITOR

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cepa central europe private aviation

Source: Fotolia

Where are we in the industry cycle?

Post summer activity was down, as usual. The seasonally adjusted trend has also turned down, with the market still stuck at the bottom of the recovery corridor.

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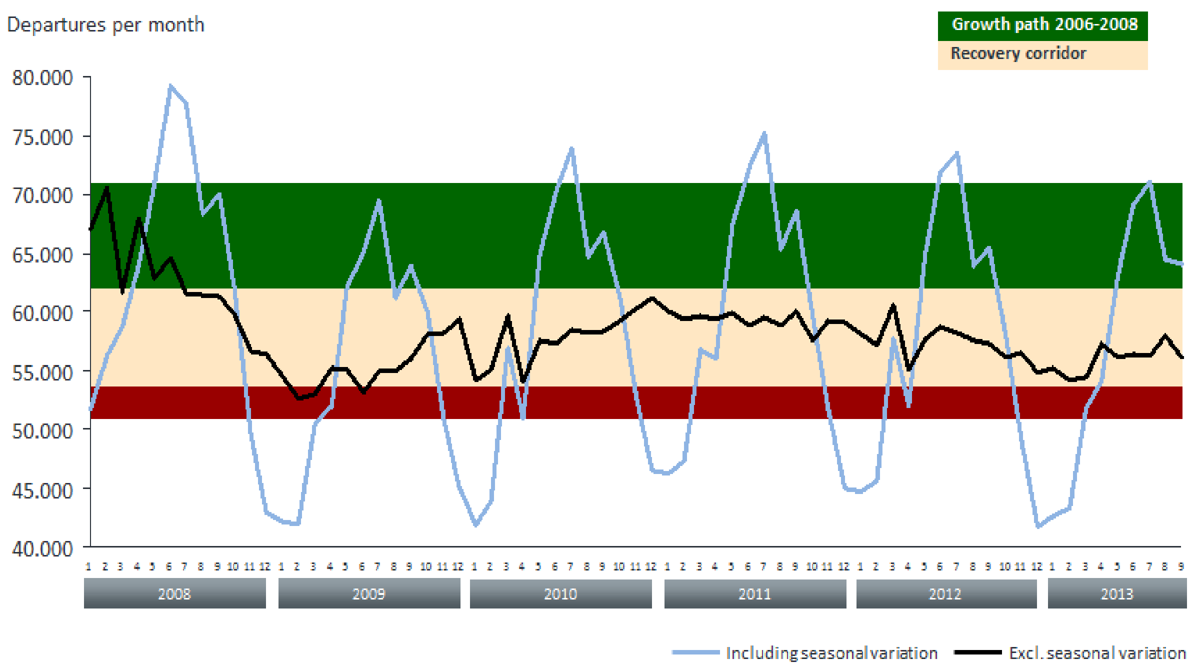
THE BIG PICTURE



Note: Only Charter and Private flights are considered

THE INSIDE STORY

For the European and peripheral Nth Africa and Middle East market:

- Analysis of key factors influencing this month
- Monthly YTD analysis departures & hours
- 5 year growth path for private and charter flights
- Analysis by fleet, aircraft segment and aircraft type

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European Business Aviation departure growth in September

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The market fell back in September, with patchy growth in southern Europe, Benelux, Scandinavia and Baltics. Leading western European markets lost heavily YOY.

THE BIG PICTURE

THE INSIDE STORY

For region by region analysis of business aviation activity:

- Flights gained and lost YOY and YTD
- Country market share and YOY growth of activity
- Pistons versus Jets versus Turboprops in each country
- Charter, Private and Other flights/hrs per country market

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Principal regional flows, September 2013 and YOY change

In contrast to August, most domestic traffic fell significantly. Notable gains were France & Germany to Spain, Switz-UK, Spain-Italy, with losses Germany-Austria, Turkey-Germany.

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THE BIG PICTURE

	France	Germany	UK	Italy	Switzerland	Spain	Austria	Turkey	Russia	Ukraine
France	-3.0%	-6.4%	-2.3%	-3.3%	-2.3%	7.5%	-12.0%	0.0%	0.0%	50.9%
Departures	5078	653	1160	664	1024	414	132	62	323	80
Germany	-9.1%	-4.5%	-5.7%	-2.3%	-8.6%	10.7%	-8.8%	-23.0%	0.0%	-45.1%
Departures	628	4560	444	387	530	290	456	117	155	45
UK	-5.4%	-6.1%	0.2%	9.7%	-2.4%	-8.4%	1.3%	-9.8%	10.1%	-11.1%
Departures	1096	460	3773	396	399	336	80	46	163	40
Italy	1.2%	2.6%	0.5%	1.4%	5.6%	4.7%	-6.3%	-6.1%	7.3%	2.4%
Departures	700	398	380	2017	393	199	148	46	220	43
Switzerland	-1.8%	-8.7%	0.8%	-10.7%	-9.7%	-7.8%	-5.7%	-12.5%	9.5%	7.7%
Departures	1025	536	400	360	468	165	150	35	104	42
Spain	-3.6%	20.0%	-9.8%	13.5%	-4.7%	-0.6%	-4.4%	54.5%	-42.0%	200.0%
Departures	400	276	350	202	162	922	43	17	47	15
Austria	-0.7%	-12.3%	7.1%	-8.9%	3.3%	-14.9%	-8.5%	-40.9%	-27.4%	9.1%
Departures	133	449	75	153	158	40	590	13	61	36
Turkey	20.0%	-34.0%	1.9%	21.3%	-54.5%	-7.7%	0.0%	-21.8%	6.7%	44.7%
Departures	66	105	53	57	20	12	17	938	336	68
Russia	0.7%	8.6%	-7.5%	13.9%	1.0%	-31.5%	-10.3%	7.2%	250.0%	-15.5%
Departures	278	176	148	189	104	50	70	342	14	251
Ukraine	16.7%	-24.0%	-2.3%	27.0%	-15.2%	220.0%	11.1%	75.6%	-21.4%	-1.2%
Departures	63	57	42	47	39	16	40	72	213	941

Note: Only Charter and Private flights are considered

THE INSIDE STORY

For traffic flows:

- Zoom in on country-country traffic flows
- Trends incoming flights from Middle East, Africa, BRICs
- All global ICAO region connections with European area
- Analysis of most flown charter & private flight O&Ds, YOY

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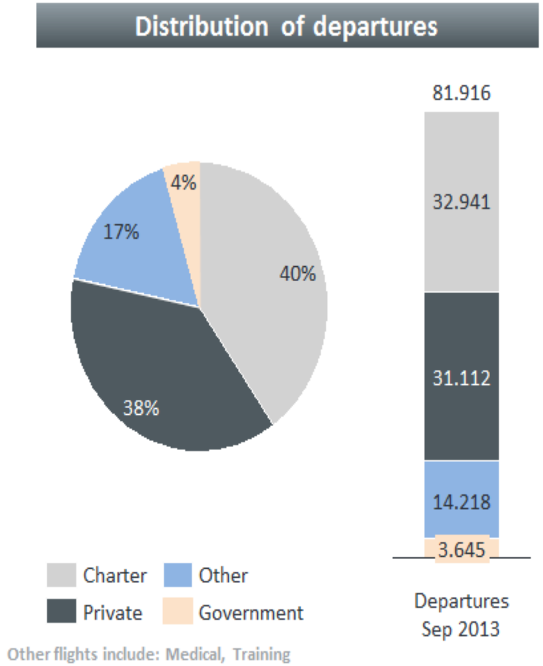
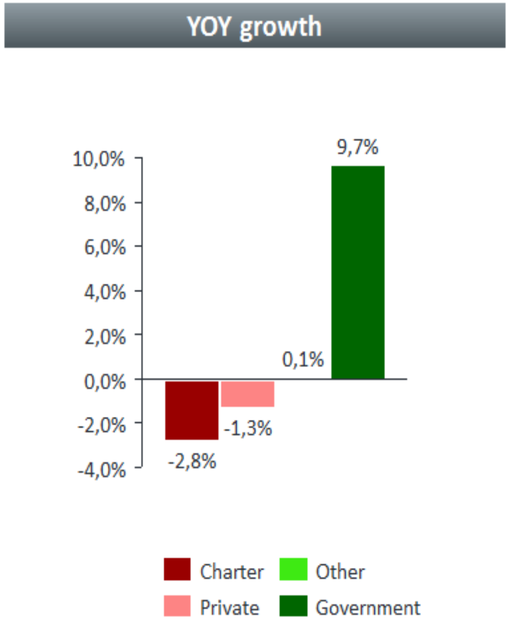
Activity by flight filing (mission type), September 2013

Government flights increased significantly in September YOY; otherwise there were declines in private and more so in charter activity.

THE BIG PICTURE





THE INSIDE STORY

For region by region:

- Each of last 12 months' private and charter activity
- Analysis of sector length and growth by aircraft size segment and seat capacity segment
- Distinction between intra and outbound Euro region activity
- Specific focus by aircraft segment and type

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Top 20 Airport departures, YTD

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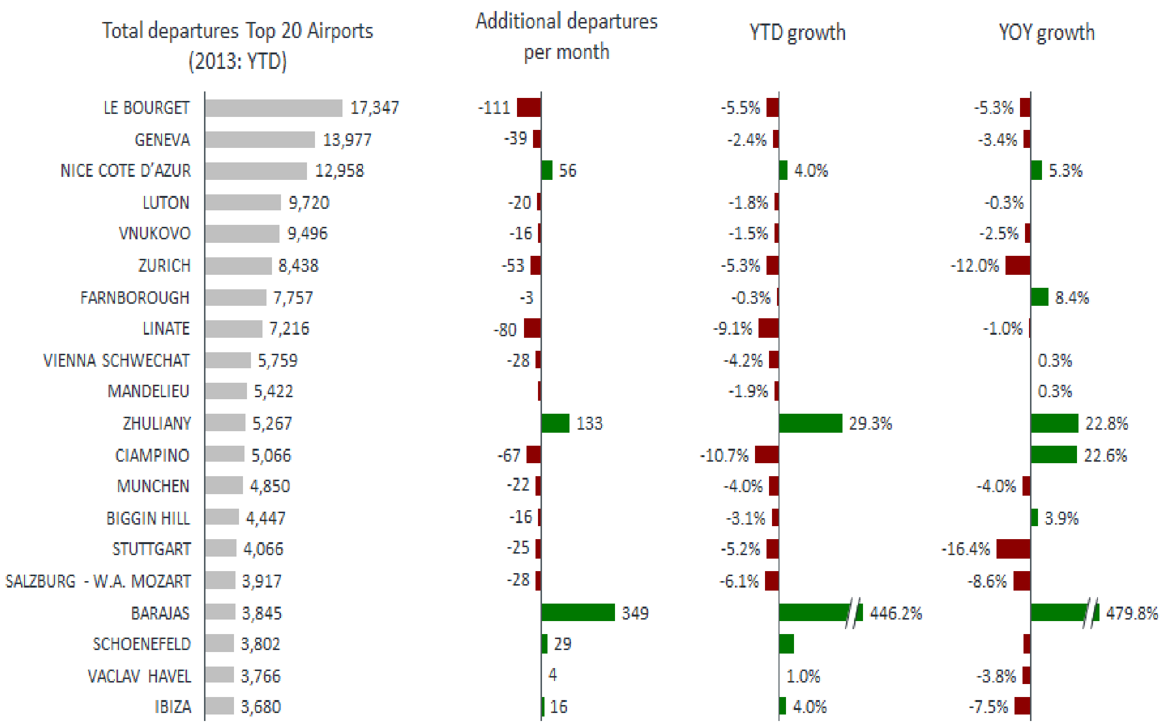
Notably Northolt climbed into top 20 for YOY growth, up 35% this year. At the top of the list, Nice narrowly up, Zurich heavily down this month, Zhuliany reinforced YTD gains.

THE BIG PICTURE



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THE INSIDE STORY

For Airports

- YOY activity growth by charter and private flights at 25 leading airports
- Focus on fastest growing and fastest falling airport activity throughout Europe: YOY growth and # departures
- Specific airport activity analysis: inbound & outbound connections, aircraft types, mission type, fuel, FBO traffic

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Definitions

- The charts illustrated in this analysis source data from national business aviation associations, Eurocontrol, and the FAA, covering 50 European, Middle Eastern and North African national territories.
- All data analysis is carried out by WINGX Advance through our proprietary activity tracking methodology.
- Illustrated flight activity analysis pertains to all IFR registered flights within Eurocontrol territories and between Eurocontrol territories and the rest of the world.
- Flights within Eurocontrol territories are referred to as “EU domestic”, flights between these territories and the rest of the world are defined as “long haul”.
- The analysis covers all single and multi engine business aviation aircraft categories: Jets, Turboprops and Pistons, equating to 281 aircraft types.
- Coverage of business jet types used by commercial airlines is not comprehensive, but does capture, for example, Embraer Legacy (ERJ135) Bombardier 850 (CRJ200), A318 Elite, Airbus 319 and BBJ3 business aviation flights.
- Jet aircraft activity is segmented by cabin/range capability: Airline Jet (Bizliner), Ultra Long Range, Heavy Jet, Super Mid Size Jet, Mid Size Jet, Super Light Jet, Light Jet, Entry Level Jet, Very Light Jet.
- Utilisation of all aircraft is also categorised by Airframe OEMs. The analysis, as indicated, covers all types of private and commercial (charter) departures. We also indicate the additional activity components corresponding to “other” flights (Government, Training, Military, Medical).
- Aircraft utilisation is measured by number of flight departures and the related number of flight hours. Our analysis does not include Overflights. We do include arrival flights from all global ICAO regions into Europe.
- The analysis is shown for the preceding calendar month; it is compared to the previous year same month (YOY or Year on Year), and to the current total activity for the year (YTD or Year to Date).

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