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ADVANCE

March & April 2013

BUSINESS AVIATION
MONITOR

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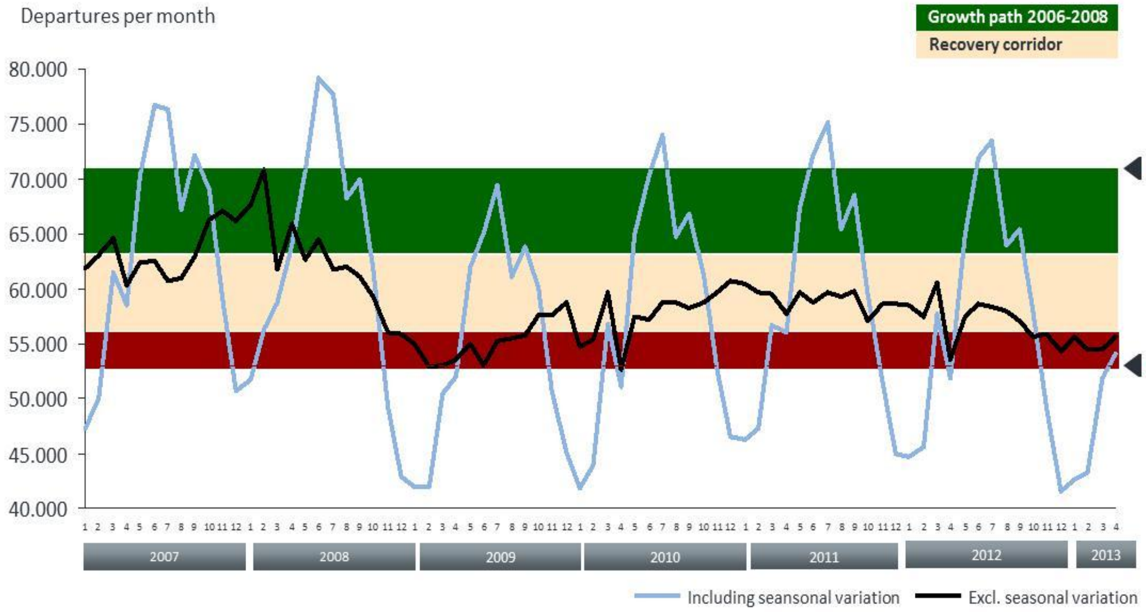
central europe private aviation

Where are we in the industry cycle?

Sequential month activity is up, even after the seasonal effect is excluded. However, activity remains in the trough it entered in Q4 2012, with no recovery in sight.

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
- Pistons Vs Jets Vs Turboprops

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European Business Aviation departure growth in March-April

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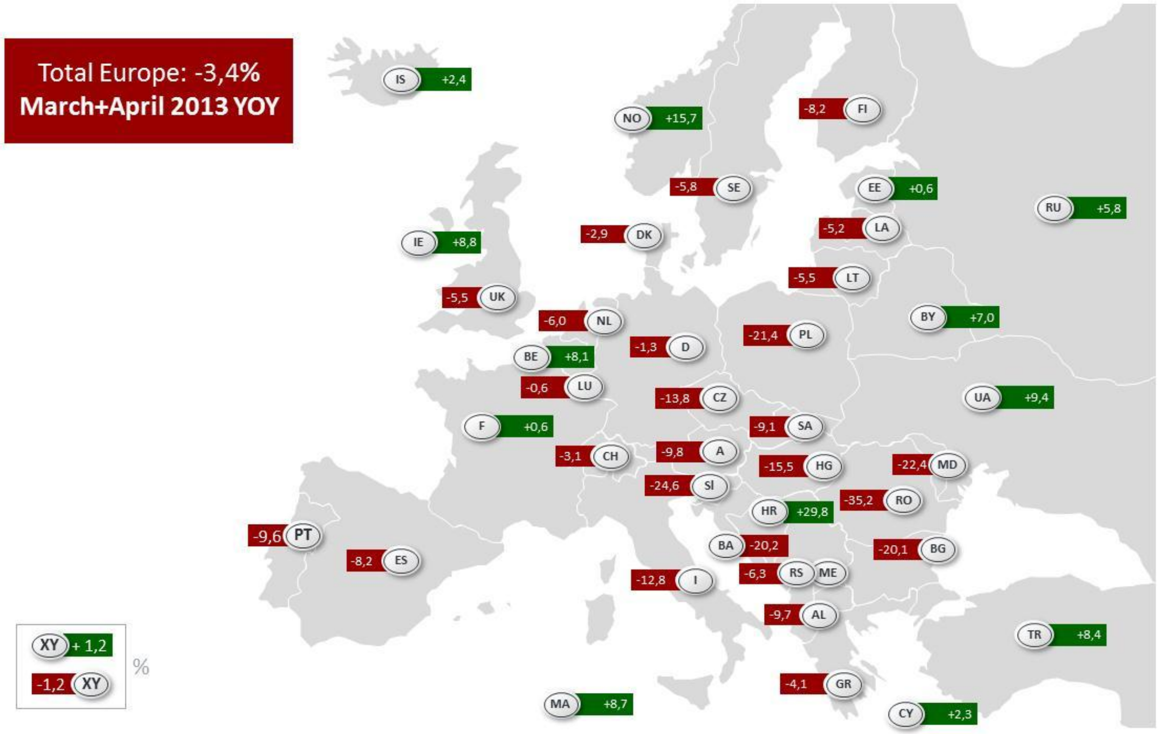
Focus on March-April YOY analysis (Easter 2013 calendar distorts April YOY analysis); growth was restricted to European periphery (France and Belgium exceptions)

THE BIG PICTURE

Total Europe: -3,4%
March+April 2013 YOY



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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 Vs Jets Vs Turboprops
- Distribution of Charter, Private and Other flights

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Regional flow of departures between principal markets

The most significant falls in activity were in domestic flying in leading markets (Germany, UK), but intra France and France-Germany flights up, notably also France-Russia flows.

THE BIG PICTURE

EG: Italy-UK **activity up 5%**

Departures March+April 2013

Destination country

Origin country

	France	Germany	UK	Switzerland	Italy	Spain	Austria	Russia	Turkey	Ukraine	Sweden	Belgium	Netherlands	Poland	Norway	Greece
France	3.8%	8.1%	-13.0%	-5.7%	-3.1%	4.2%	-15.0%	18.4%	25.4%	13.8%	-4.0%	-6.0%	-2.3%	-1.0%	-36.4%	-2.5%
Departures	9,770	1,042	1,638	1,758	883	615	233	566	74	107	48	442	252	95	14	39
Germany	9.8%	-1.3%	-6.1%	-0.7%	-5.1%	13.6%	-12.8%	1.4%	16.8%	-7.1%	31.0%	-6.6%	-14.8%	3.6%	22.6%	-6.7%
Departures	1,087	8,000	723	1,105	524	427	851	368	216	91	258	255	334	256	38	42
UK	-13.6%	-0.4%	-9.3%	-0.9%	5.5%	-13.5%	-2.1%	-6.4%	3.7%	10.3%	-9.9%	1.8%	8.8%	12.8%	-1.4%	-11.1%
Departures	1,601	765	6,054	885	424	449	140	278	85	64	82	230	347	44	72	40
Switzerland	-4.6%	-0.3%	2.1%	-2.8%	-7.9%	9.4%	0.6%	8.0%	-4.5%	27.3%	0.0%	-13.6%	-19.6%	-10.9%	-25.9%	7.9%
Departures	1,746	1,110	915	1,224	563	302	312	325	64	112	54	165	156	57	20	41
Italy	-2.8%	-1.7%	5.6%	-8.8%	-22.2%	-11.7%	-19.4%	6.8%	74.4%	6.8%	23.8%	-8.9%	-17.3%	-11.3%	-20.0%	5.3%
Departures	867	536	435	561	2849	226	200	235	75	79	26	72	62	47	4	60
Spain	-2.8%	10.6%	-7.1%	-2.3%	-19.4%	-19.2%	4.3%	17.9%	105.6%	33.3%	58.3%	5.8%	-4.7%	130.0%	16.7%	-10.0%
Departures	592	396	447	292	216	1,406	73	99	37	16	19	73	61	23	7	9
Austria	-13.3%	-13.4%	3.4%	-2.8%	-14.2%	-17.1%	-6.3%	-4.0%	-25.0%	18.2%	-6.3%	-9.1%	-21.4%	-17.6%	66.7%	-33.3%
Departures	242	845	150	310	217	58	1,236	168	27	78	15	40	44	56	5	18
Russia	8.6%	0.6%	-8.8%	10.2%	5.0%	1.0%	-8.2%	-8.5%	34.6%	1.2%	46.4%	16.7%	38.2%	25.5%	12.5%	-8.3%
Departures	567	345	259	302	250	104	180	43	210	414	41	21	47	59	18	55
Turkey	47.5%	9.7%	6.0%	-14.1%	34.5%	56.5%	-3.2%	51.4%	6.5%	30.8%	266.7%	-53.8%	-15.4%	-26.7%	115.4%	-2.6%
Departures	87	214	88	61	78	36	30	215	1,583	51	22	6	11	11	28	38
Ukraine	9.7%	-2.0%	30.4%	23.5%	15.9%	16.7%	12.3%	0.5%	0.0%	8.6%	50.0%	28.6%	33.3%	3.1%	-66.7%	19.0%
Departures	124	100	73	100	80	14	73	400	51	1,447	3	9	8	33	1	25
Sweden	20.5%	11.6%	-8.9%	18.2%	23.5%	43.8%	10.5%	20.0%	466.7%	-75.0%	-11.2%	18.8%	-20.0%	-51.6%	20.2%	0.0%
Departures	47	241	82	52	21	23	21	30	17	2	1,796	19	16	15	119	1
Belgium	-6.9%	-2.5%	-0.5%	-11.4%	4.1%	-9.3%	-2.1%	-7.1%	-8.3%	80.0%	12.5%	46.3%	-6.5%	-34.8%	0.0%	-50.0%
Departures	445	268	218	164	77	68	47	13	11	9	18	743	144	15	6	3
Netherlands	-7.6%	-10.8%	6.3%	-25.7%	-22.9%	-25.4%	-5.6%	122.7%	33.3%	75.0%	-23.5%	-3.1%	3.8%	-18.2%	0.0%	0.0%
Departures	256	363	354	136	54	53	51	49	16	7	13	157	383	18	9	2
Poland	18.2%	8.0%	27.8%	-7.6%	-27.6%	37.5%	-61.7%	6.5%	-6.3%	3.1%	-60.6%	-5.6%	-30.0%	-39.3%	400.0%	100.0%
Departures	91	283	46	61	42	22	64	49	15	33	13	17	14	523	5	4
Norway	26.3%	18.2%	-8.6%	-33.3%	100.0%	-54.5%	-37.5%	13.3%	100.0%	-66.7%	13.7%	66.7%	-36.4%	50.0%	20.8%	-66.7%
Departures	24	39	64	14	6	5	5	17	28	1	116	5	7	3	698	1
Greece	33.3%	3.1%	-17.0%	-7.5%	25.4%	50.0%	-40.9%	-11.5%	0.0%	17.4%	0.0%	-20.0%	75.0%	66.7%		-8.9%
Departures	40	33	39	37	74	12	13	54	39	27	1	4	7	5	0	337

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
- Europe’s most flown charter & private flight O&Ds, YOY

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Activity by flight filing (mission)

Other flights, comprising government, medical, and training, fell heavily in this period.
Over the March+April period, there were (unusually) more private than charter flights

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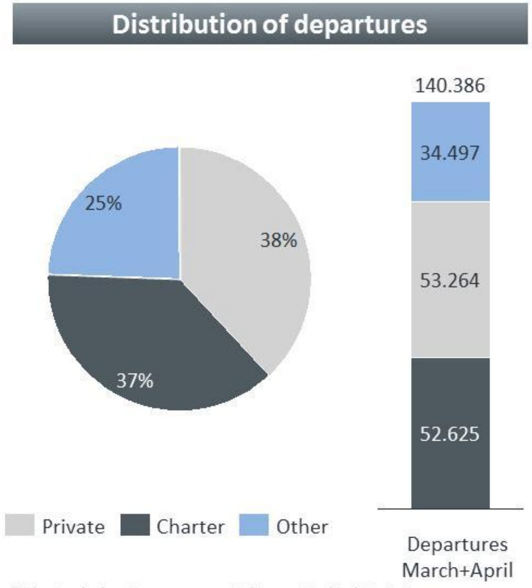
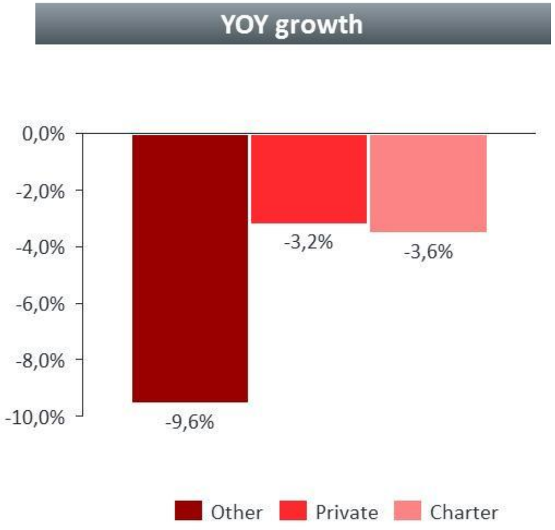
THE BIG PICTURE

Departures March+April 2013


Distribution of departures

Other flights include: Government, Military, Medical, Training


YOY growth

THE INSIDE STORY

For region by region:

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

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Airframe OEM performance and market shares

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In terms of OEM fleet activity, Airbus led bizliner activity growth, Bombardier in ULJ and (uniquely) in HJ, Cessna in SMS, Gulfstream in MJ, Embraer in LJ, Cessna maintaining VLJ activity

THE BIG PICTURE

Departures March+April 2013

	Cessna	Beechcraft	BOMBARDIER	DASSAULT	Piper	Hawker	Gulfstream	LEARJET	EMBRAER	PILATUS	SOCATA	AIRBUS	PIAGGIO AERO	BOEING	ECLIPSE AVIATION
	YoY	YoY	YoY	YoY	YoY	YoY	YoY	YoY	YoY	YoY	YoY	YoY	YoY	YoY	YoY
Bizliner												23.5%		-5.9%	
Departures												1447		398	
Ultra long range			21.9%	16.3%			7.2%								
Departures			2905	1714			2568								
Heavy jet			8.2%	-3.8%			-1.6%		-10.6%						
Departures			4691	6757			1750		2222						
Super midsize jet	14.3%		-5.5%	23.9%		98.8%	-10.6%								
Departures	2145		2068	860		159	818								
Midsize jet	-12.8%			-49.0%		-5.8%	3.6%	-6.8%							
Departures	526			160		4894	432	1808							
Super light jet	-10.6%			-21.3%				-9.9%							
Departures	7918			174				1401							
Light jet	-4.9%	-14.7%				-12.6%		-1.6%	55.5%						
Departures	10632	1157				1496		886	706						
Entry level jet	-12.8%														
Departures	3333														
Very light jet	0.0%								-21.5%						70.7%
Departures	3570								711						227
Turboprop	2.0%	0.1%			-1.0%		-41.5%			6.8%	-7.1%		-14.8%		
Departures	871	7931			2588		113			3492	1791		1218		
Pistion	-8.2%	-20.0%			-13.6%										
Departures	3623	983			5301										

Note: Only Charter and Private flights are considered

THE INSIDE STORY

For OEM providers

- YOY activity growth for each leading Jet, Turboprop and Piston Airframe OEM, in each aircraft segment
- Airframe and Engine OEM performance and market share by flight hours, and charter/private flight activity breakdown

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Number of departures by aircraft segment and trip category

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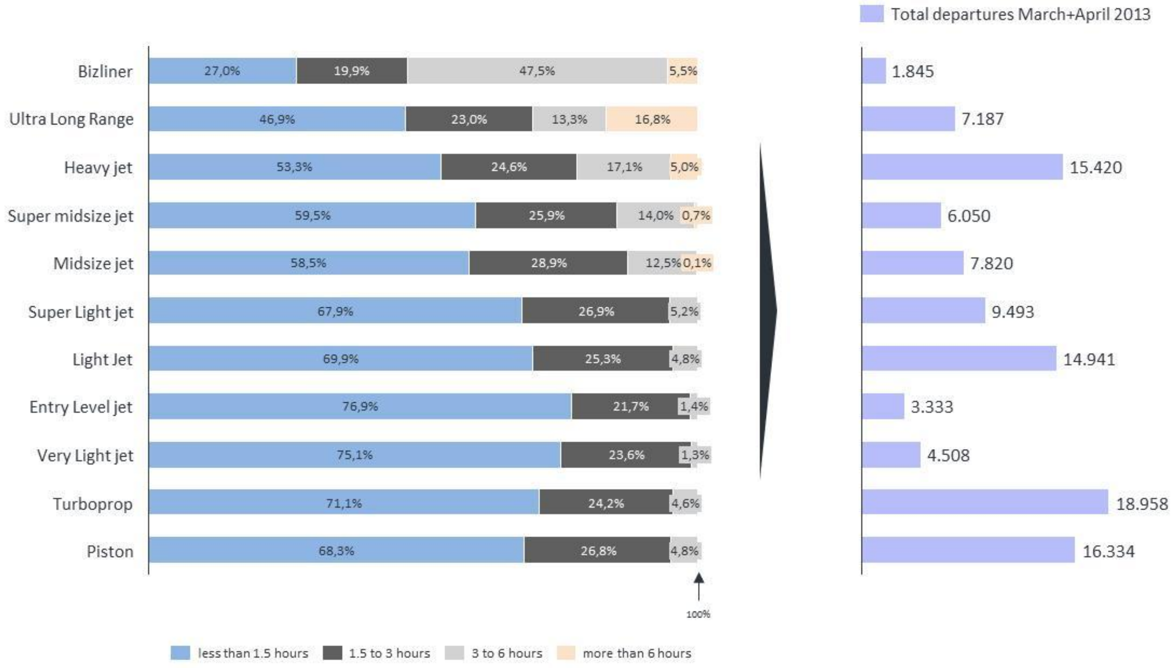
During the period, light aircraft (including piston and TP) flew more than 60% of activity. Within this group, VLJs lead the competition for <1.5h flight sectors.

THE BIG PICTURE



Note: Only Charter and Private flights are considered

THE INSIDE STORY

For Aircraft Segments (Jets, TP, Pistons):

- YOY activity growth and market share of departures & hours
- YTD analysis of each month YOY change in activity
- Track-back on each segment share of private & charter

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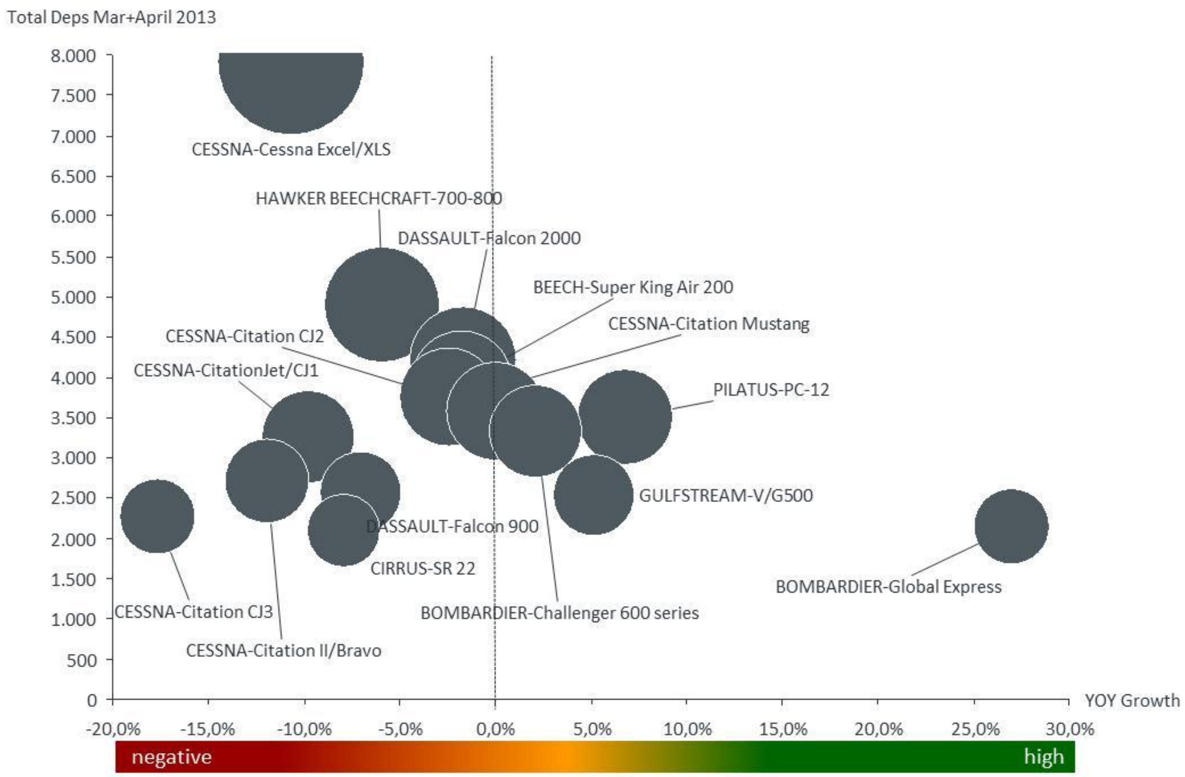
Top 15 Aircraft activity

In this period the Global Express stands out in gaining activity, the Mustang is holding its ground, XLS declines is a bellwether of the recession, and the CJ portfolio is fading fast.

THE BIG PICTURE



Note: Only Charter and Private flights are considered

THE INSIDE STORY

For Aircraft Types (Jets, Turboprops, Pistons):

- YOY activity growth and market share of departures & hours
- Focus on activity growth and share in Charter
- Focus on activity growth and share in Private
- Zoom in on winners & losers

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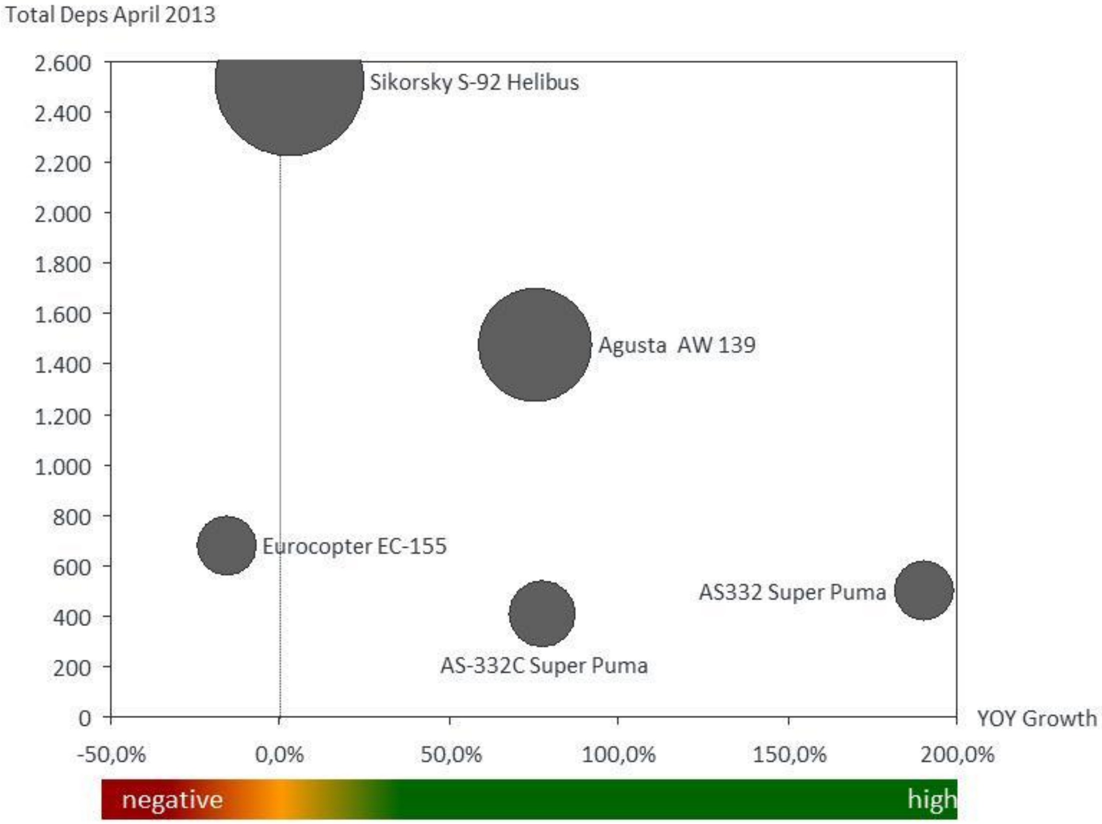
Off-shore Heli departures by Top 5 types

All but Eurocopter EC-155 helicopter types gained activity, in particular the Super Puma.
The scale of increased activity is distorted by the 2012-2013 Easter calendar contrast.

THE BIG PICTURE



THE INSIDE STORY

Activity by Off Shore Helicopter activity

- Leading airports and trending O&Ds
- Fuel consumption and engine usage
- Analysis of mission type
- Map of O&D trends over last 12m

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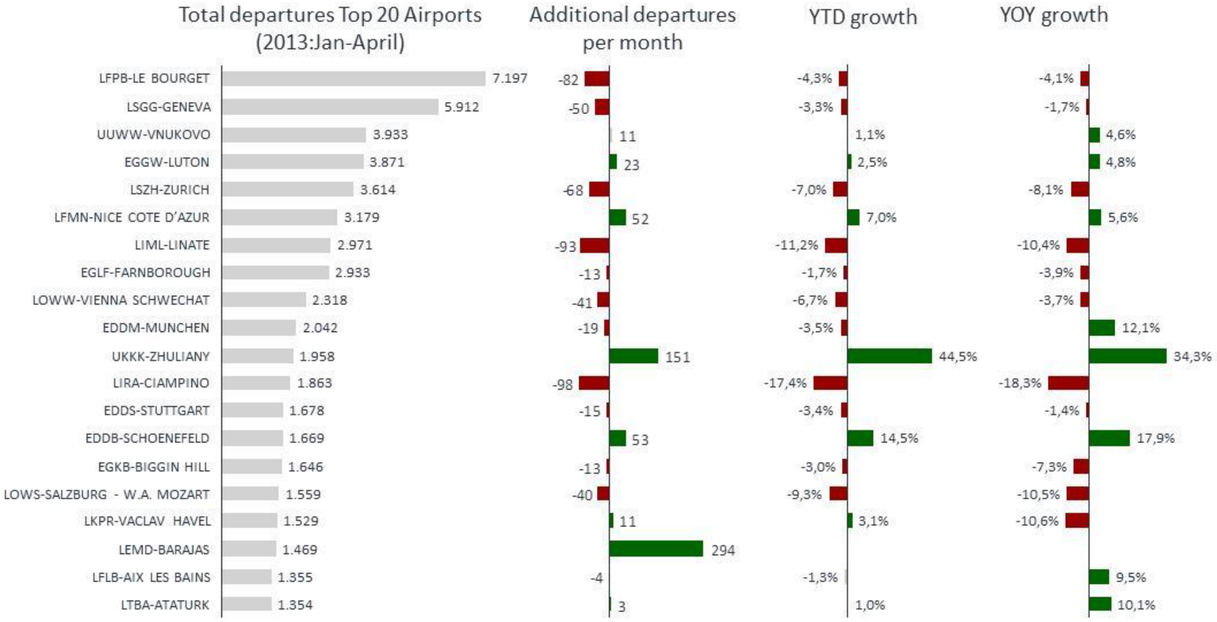
Top 20 Airport departures

LFPB and LSGG lost further activity. YTD, only LFMN, UKKK and EDDB have registered significant activity gains on 2012. LIRA and LIML (formerly top of the list) are losing ground fast.

THE BIG PICTURE



Note: Torrejon closed for private aviation in January 2013, leading to a major switch to Barajas. The resulting % change is not shown so as not to distort the overall chart

Note: Only Charter and Private flights are considered

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

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WINGX Business Aviation Insight

› Each of the main Key Performance Indicators in this Monitor are analyzed in more detail in our monthly Insight. The Insight is **EUR 75/month** for a quarterly subscription, with significant discounts **for a one year** subscription. Let us know if you would like to have a **free trial**.

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› We can adapt our aggregate market analysis to address **your specific information needs**. These may, for example, concern specific route monitoring, operator fleet analysis, fuel supply potential, FBO passenger throughput, landing fee analysis, or aircraft type performance analysis.

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› The WINGX team are senior professionals with strong operational and commercial track records in the aviation industry. We can combine our experience and data sources **to advise your business** on new market opportunities, competitor threats, strategic planning and financial forecasting.

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› WINGX has an industry wide and multi-regional network of relationships with all participants in the business aviation supply chain. We are in an excellent position to **initiate and manage market surveys** to help you better understand the needs of your customers and suppliers.

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 and the United States.
- All data analysis is carried out by WINGX Advance through our proprietory activity tracking methodology.
- Illustrated flight activity analysis pertains to all IFR registered flights within Eurocontrol and FAA territories and between Eurocontrol territories and the rest of the world.
- Flights within Eurocontrol territories are referrred to as “EU domestic”, flights between these territories and the rest of the world are defined as “long haul”.
- The analysis covers all business aviation aircraft categories: Jets, Turboprops and Pistons, equating to 281 ICAO aircraft types. We also cover helicopters employed on off-shore operations.
- 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: Bizliner, Ultra Long Range, Super Mid Size, Mid Size, Super Light, Light, Entry Level, Very Light. All European off-shore operating helicopter types are also included.
- Utilisation of all aircraft is also categorised by Airframe OEMs. We also track business jet engine utilisation.
- The analysis, as indicated, covers all types of private and commercial (charter) departures. We also indicate the addtional 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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