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ADVANCE

December 2012

Year 2012 review

BUSINESS AVIATION MONITOR

Special INSIGHT edition

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Executive Summary

- **Significant decline** compared to activity in December 2011. Departures down 7.2% YoY.
- December activity lowest of any month in 2012 and the **lowest of any December since 2005**.
- End of dismal 2012, down 4% on 2011 with **little sign of recovery** from 4 year recession.
- In terms of usage, **worst hit were midsize, turboprop and light jet segments** operating short haul segments.
- Bright spots were long-haul trips, **use of heavy and ULR jets** and Embraer market penetration.
- Regionally, serious **setbacks in Western Europe**, particularly in domestic trips.
- **Some growth** in Turkey, CIS, recovery from Middle East, increase from Africa and Brazil.

The reasons for the exceptional (and unexpected) decline in December YoY activity is explored and illustrated in this special edition of the Business Aviation Monitor

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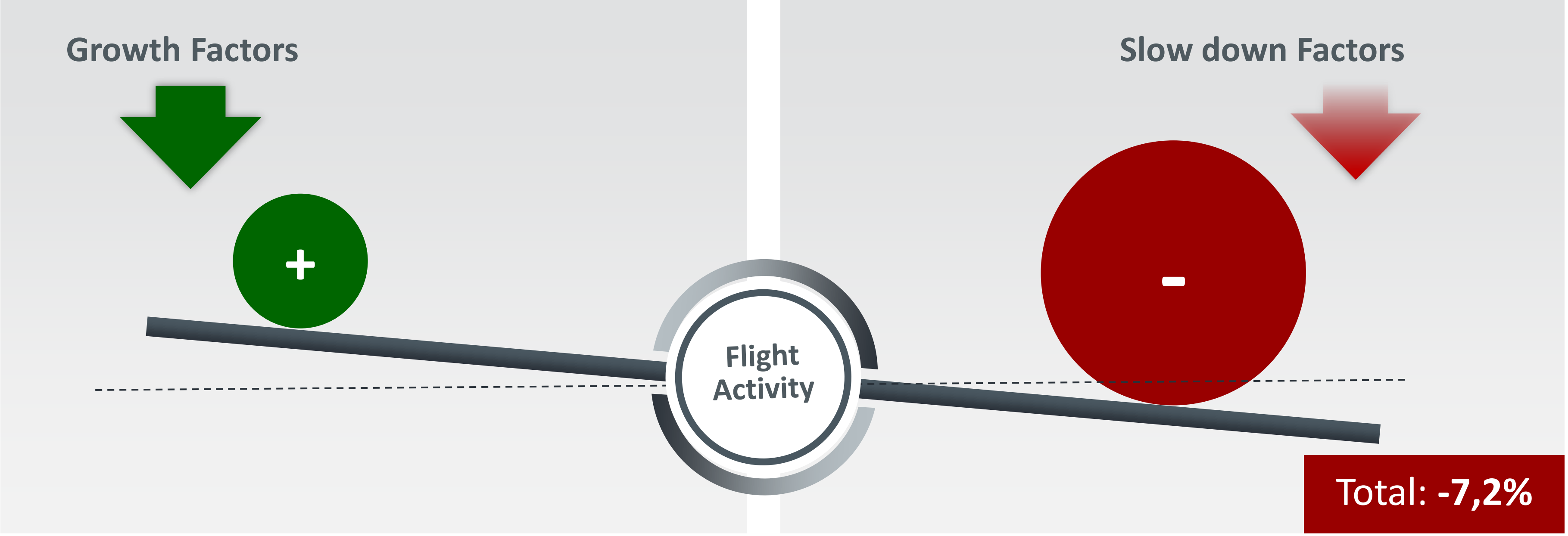
Main Factor: Fewer customers taking domestic charter trips during the Christmas period in Western Europe

Key Insight: what went wrong in December 2012



- Stand out market growth in Ukraine and Turkey
- Increase in long haul trips and especially the ULR segment (10% of all flights)
- Growth in private use of VLJs and usage of mid size jets for longer missions
- Recovery in flights from Middle East, strong CIS market, surge from West Africa

- Christmas season (1/3 of the month and 13% down YoY)
- Western Europe (90% of the market and 8% down YoY)
- Germany (14% of the market and 8% down YoY)
- Italy (4% of the market and 18% down YoY)
- Big falls in domestic trips (France -9% YoY, where domestic is 90% of total. Italy domestic trips -21%)
- Light, mid size and turboprop sectors lost 10% YoY and represent 60% of all activity

Year on year, December was an exceptionally poor month for European business aviation activity, registering the lowest activity level of any single month since 2005

European Business Aviation traffic growth in December 2012

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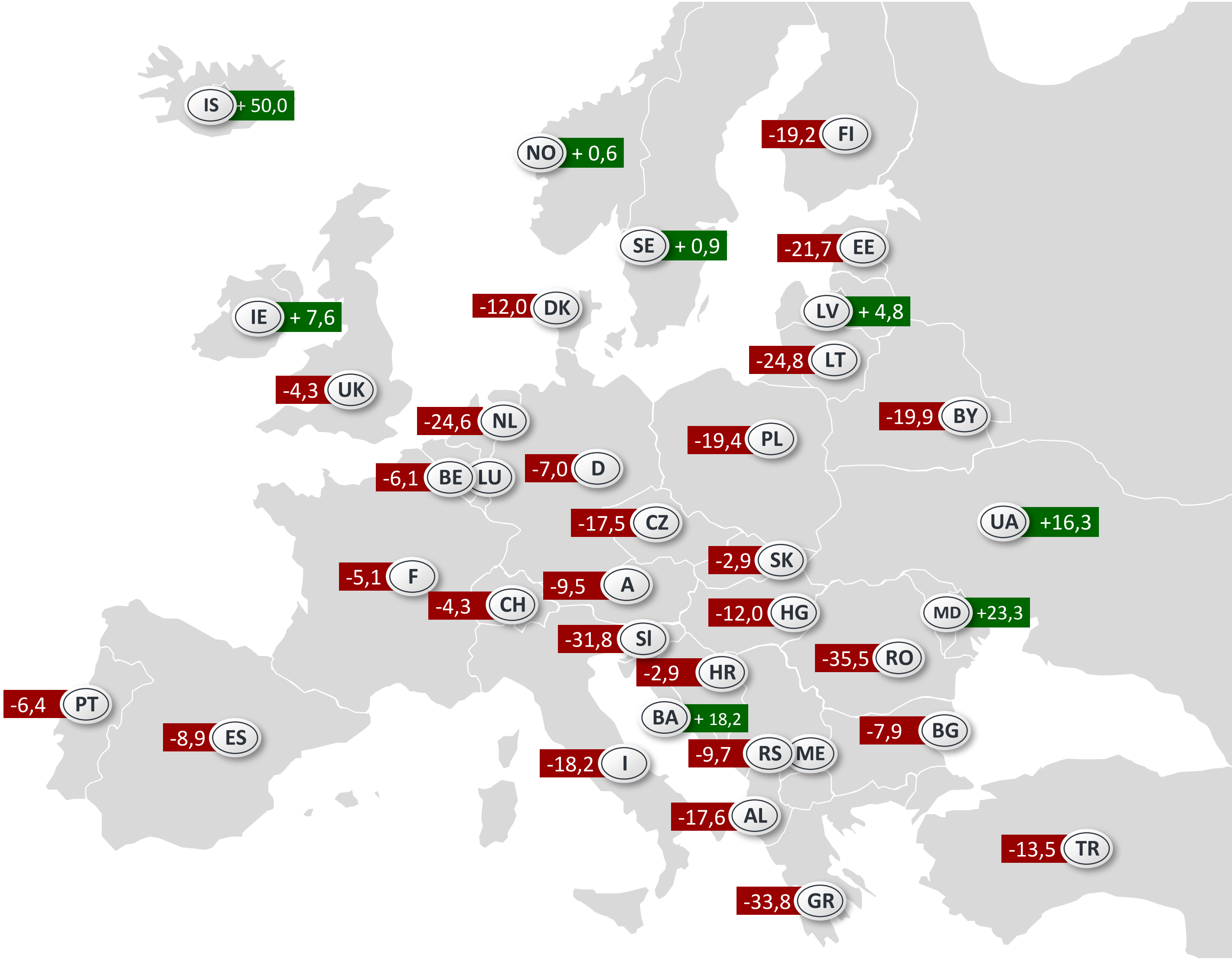
Total: -7,2%

including:
Jets, Turboprops
and Pistons



XY + 1,2
-1,2 XY
%

Departures between Europe´s leading Western markets and Eastern Europe / Russia buoyed the market. Flights within Western Europe fell dramatically YoY.

Region Flow ex Top 10 origin countries

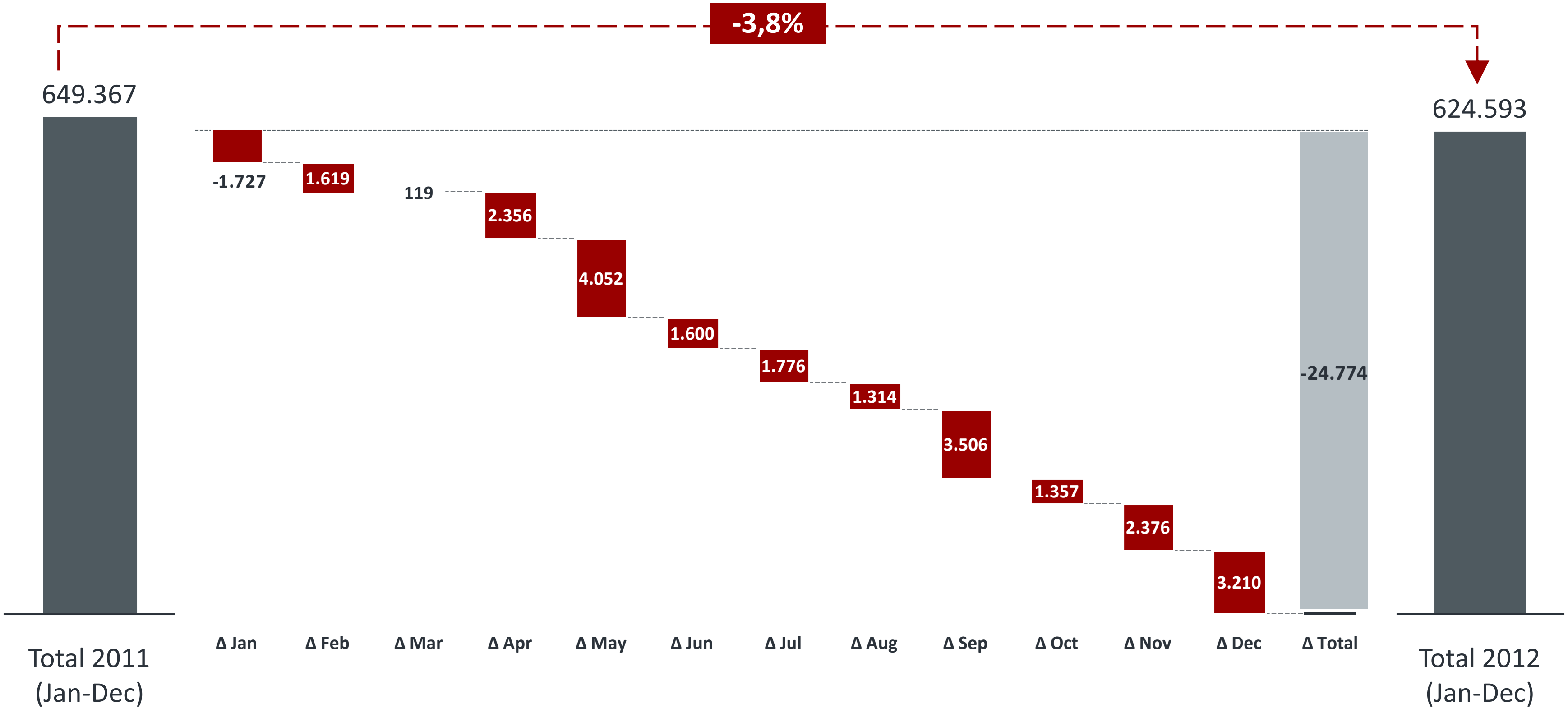
including:
Jets, Turboprops
and Pistons

Origin country	Destination country															
	FR	GER	UK	IT	CH	ESP	NRY	TUR	AUS	RUS	SWE	UKR	BEL	NET	POL	GRE
FRANCE	-8,33%	-6,82%	3,45%	-5,46%	-9,96%	-3,13%			2,60%	30,00%		60,61%	8,33%	-29,27%	0,00%	
Departures	3.466	328	599	277	642	186			79	182		53	195	58	34	
GERMANY	-3,19%	-6,55%	-6,19%	-12,84%	-9,62%	-8,06%		15,00%	-6,83%	6,79%	19,18%	7,50%	-19,60%	-15,87%	-21,57%	
Departures	334	3.052	303	190	357	114		46	273	173	87	43	160	106	80	
UK	-0,17%	4,03%	-9,72%	-9,20%	-5,94%	-26,98%	4,44%		15,25%	21,55%	41,03%		17,54%	-8,11%		
Departures	590	310	2.749	148	412	138	47		68	141	55		134	102		
ITALY	-5,92%	-21,61%	-5,59%	-21,67%	-30,00%	-20,88%			-28,74%	-5,26%			-3,92%			
Departures	286	185	152	1.540	161	72			62	72			49			
SWITZERLAND	-5,36%	-1,29%	-3,10%	-31,71%	-9,85%	15,24%			-4,58%	-1,12%		16,07%	3,85%	4,92%		
Departures	653	384	406	168	366	121		32	146	177	34	65	108	64		
SPAIN	-3,70%	-14,16%	-18,08%	-30,69%	3,92%	-11,14%							-24,39%			
Departures	182	97	145	70	106	798							31			
NORWAY			-2,38%				0,72%				-16,22%					
Departures			41				1.398				31					
TURKEY		2,33%						-23,60%		17,50%						
Departures		44	33					777		47						
Austria	-8,14%	-12,29%	12,90%	-10,26%	10,94%				-13,90%	10,13%		31,58%				
Departures	79	264	70	70	142				254	87		50				
RUSSIAN FEDERATION	23,16%	1,96%	25,25%	3,90%	-1,46%			2,44%	-8,70%			32,80%				
Departures	218	156	124	80	202			42	84			166				
SWEDEN		50,00%	2,04%		15,63%		-5,00%				-0,20%					
Departures		93	50		37		38				1.009					
NETHERLANDS	-14,89%	11,43%			73,17%					23,48%		9,62%				
Departures	40	39			71				49	163		570				
BELGIUM/LUXEMBOURG	9,30%	-11,23%	14,91%	-13,21%	-8,93%	-20,00%							-14,79%	-24,56%		
Departures	188	166	131	46	102	32							121	43		
NETHERLANDS	-22,39%	-18,60%	-18,46%		-11,84%								-4,44%	-51,41%		
Departures	52	105	106		67				34				43	155		
POLAND		-6,00%													-28,44%	
Departures		94													234	
GREECE																-67,37%
Departures																62

December marked the 3rd largest YoY fall in flight activity in 2012

Year to Date analysis of departures

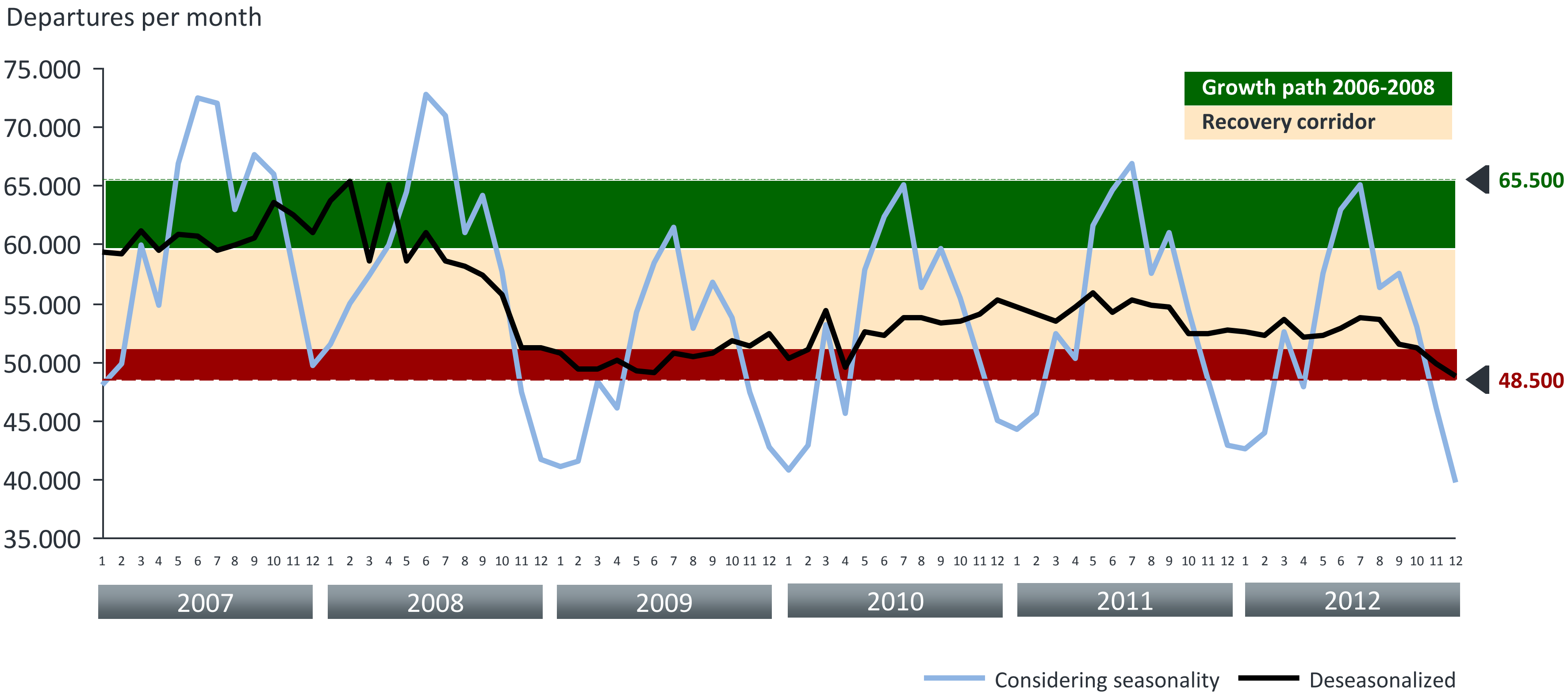
including:
Jets, Turboprops
and Pistons



European flight activity shows no signs of climbing out of the trough which started in the second half of 2008; it is now as low as it has been since the recession began.

Where are we in the cycle?

including:
Jets, Turboprops
and Pistons



December 2012 marked the biggest YoY drop since 2008

How did December 2012 compare to previous years?

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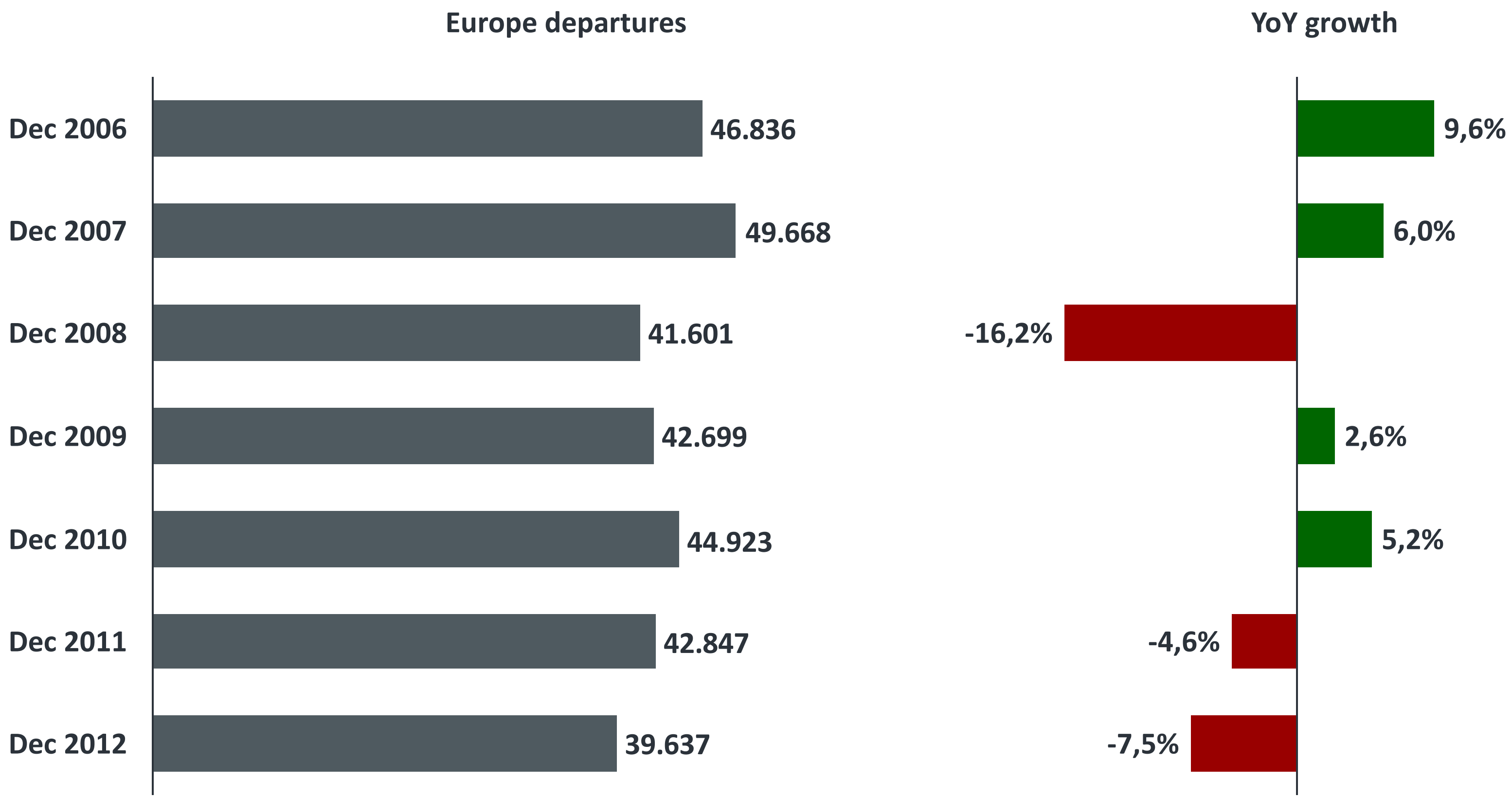
including:
Jets, Turboprops
and Pistons



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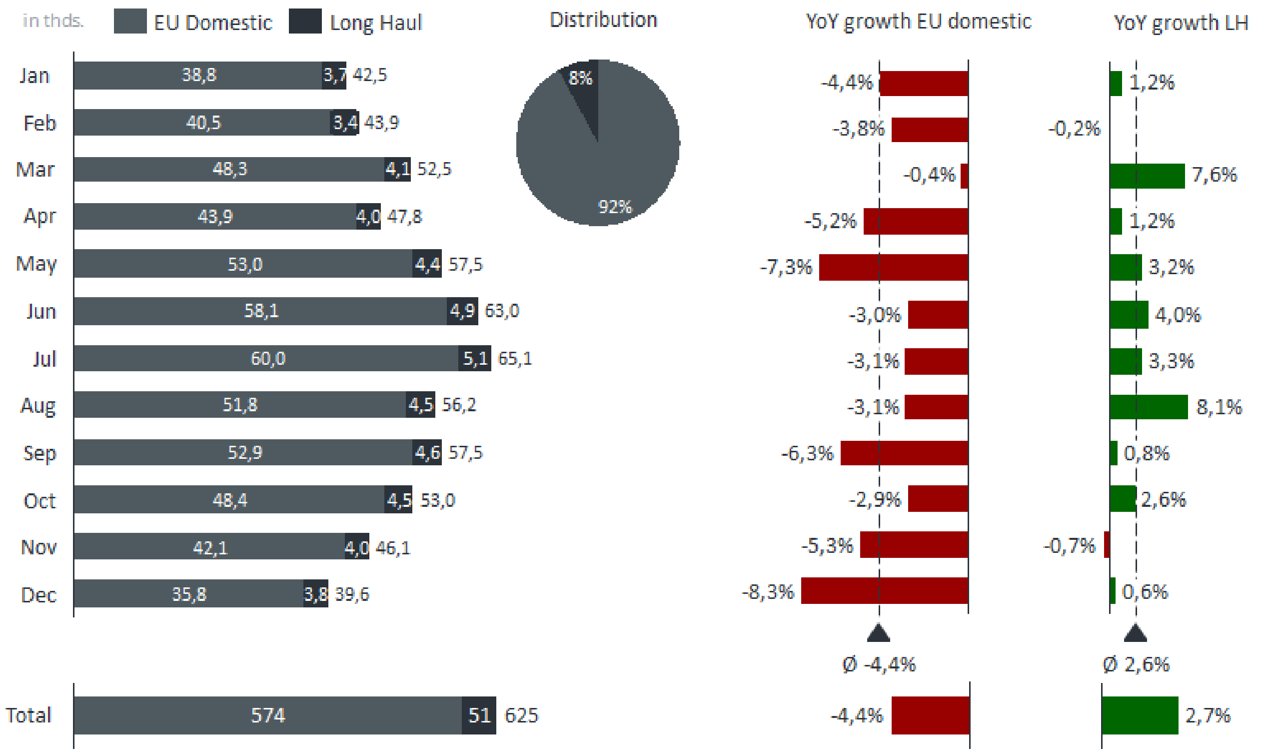
The slowdown is in domestic EU flights; long haul flights are increasing

Business aviation trips within Europe and to non European destinations



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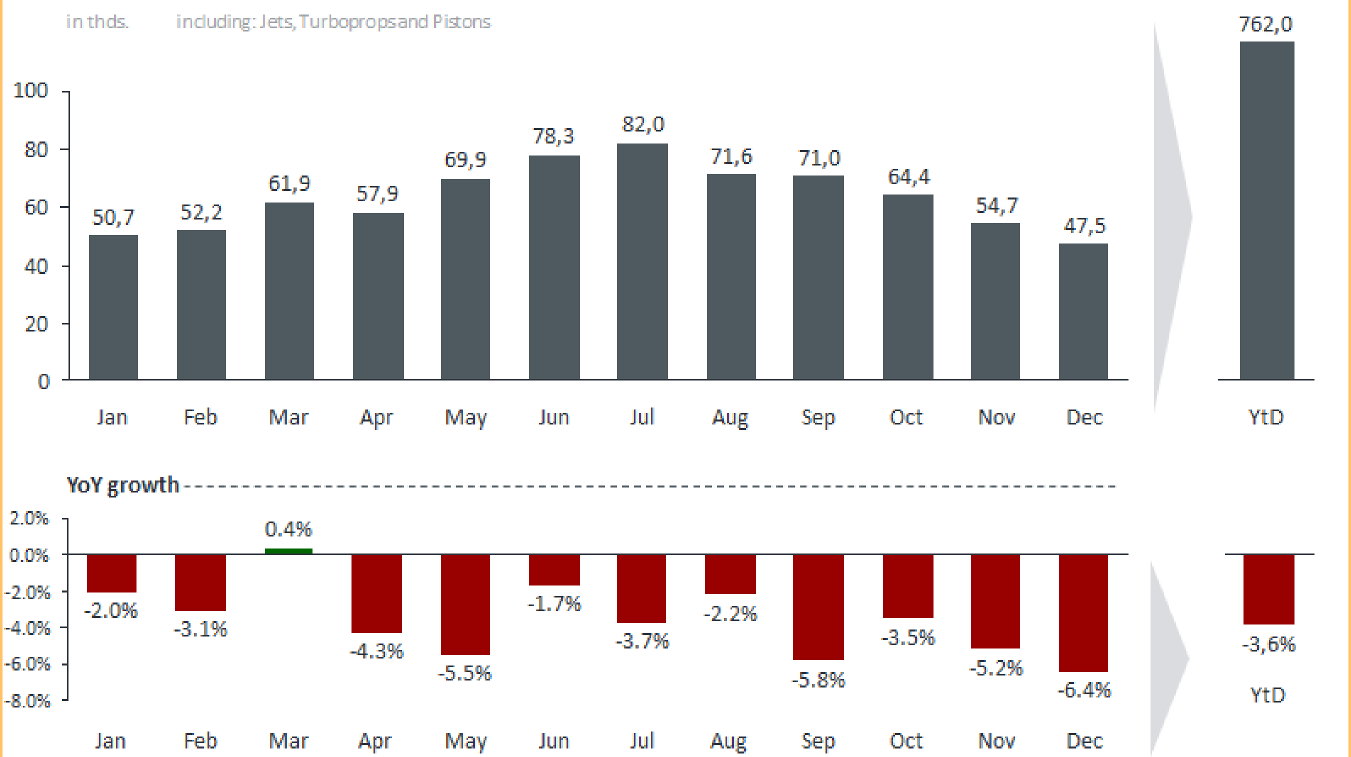
December marked the largest 2012 monthly fall in YoY business aviation activity in terms of flight hours

Flight hours development



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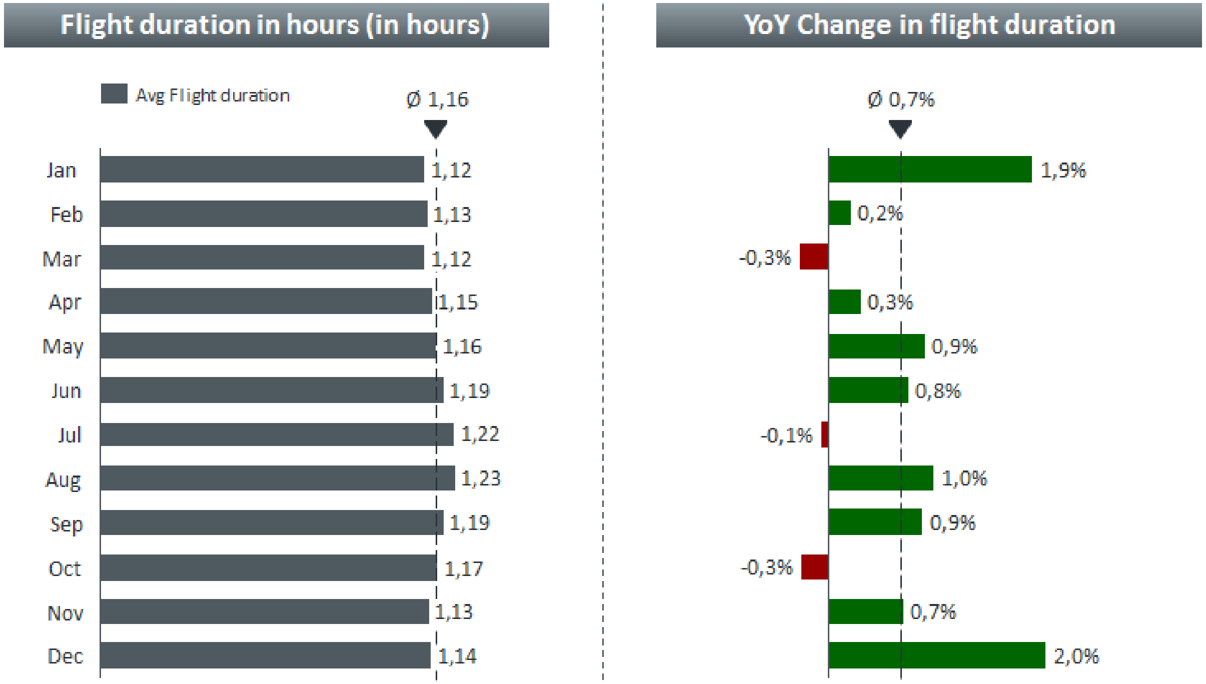
December showed the largest YoY monthly increase in average trip length within Europe. The average reflects a ´typical´mission requirement of 300km - 400km

Average trip length within Europe

including: Jets, Turboprops and Pistons



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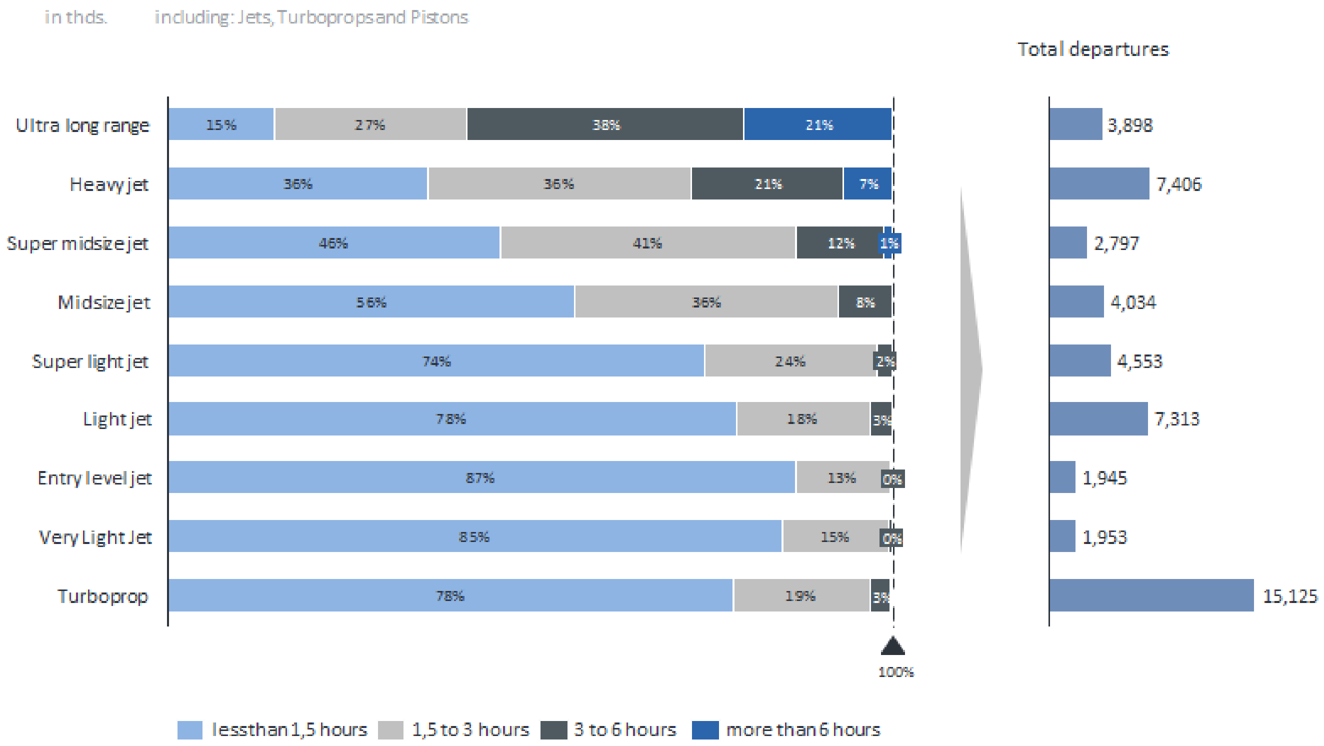
In December most business aviation trips were of less than 1.5 hours, and 2/3 operated by light jets or smaller cabins

Number of departures by aircraft segment and trip category



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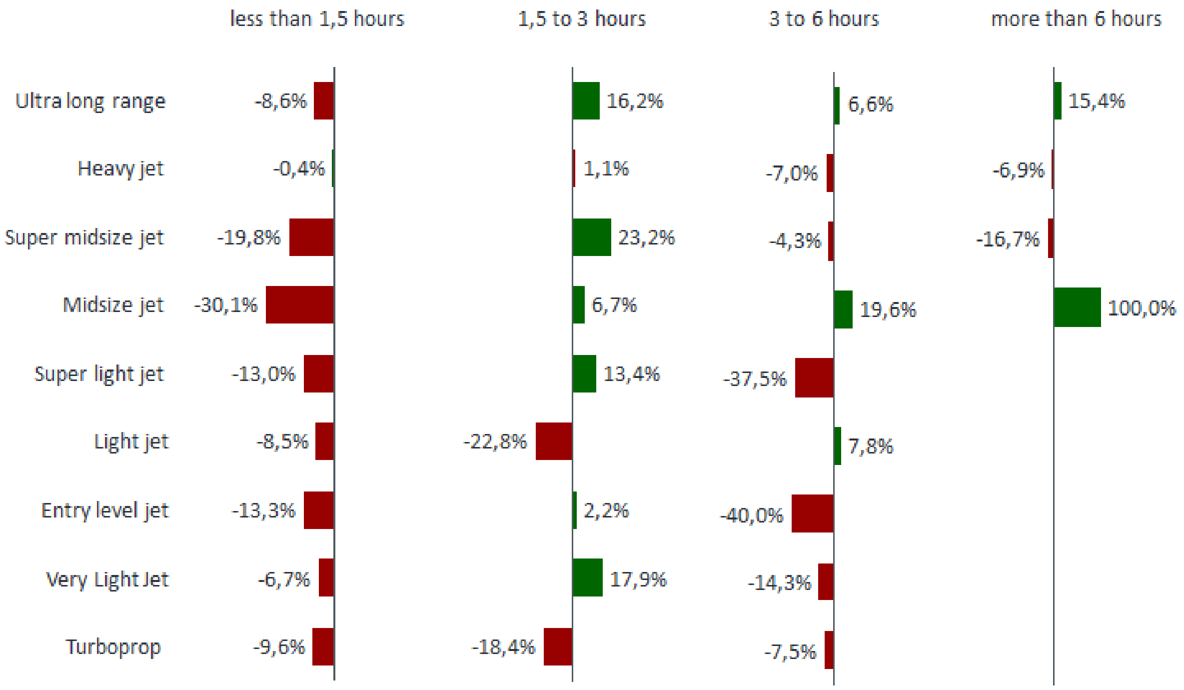
YoY, December saw a slump in short trips, especially in mid size aircraft, which are being used more for longer sectors. Likewise VLJs were employed for longer trips.

Number of departures by aircraft segment and trip category



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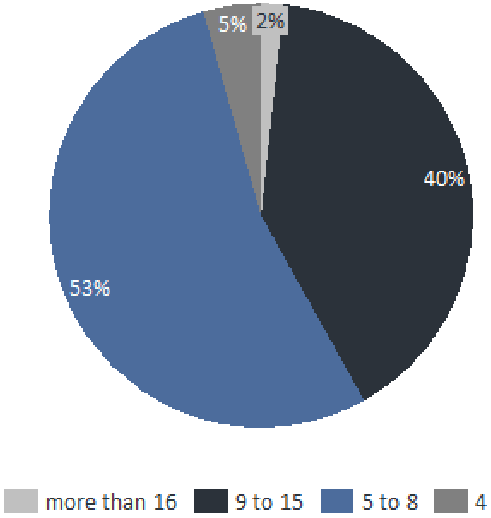
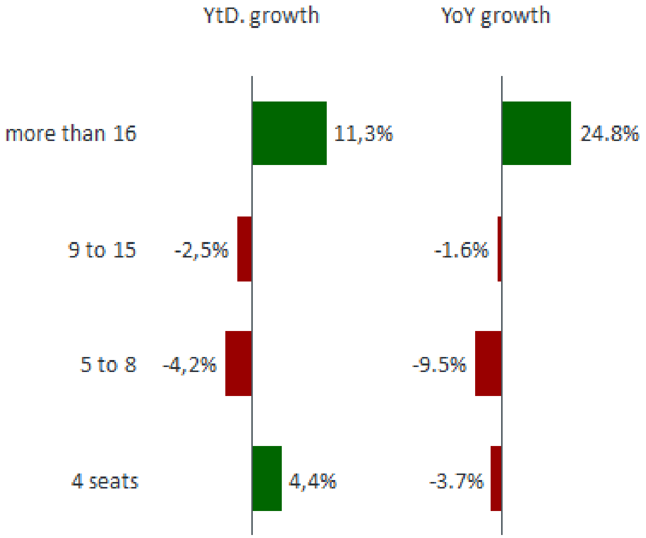
December redoubled the YoY increase of large capacity jets. But the market is still controlled by 5-15 capacity jets, where demand YoY fell at a faster rate in December.

Number of Business Jet departures by seat configuration

Distribution of departures per seat configuration

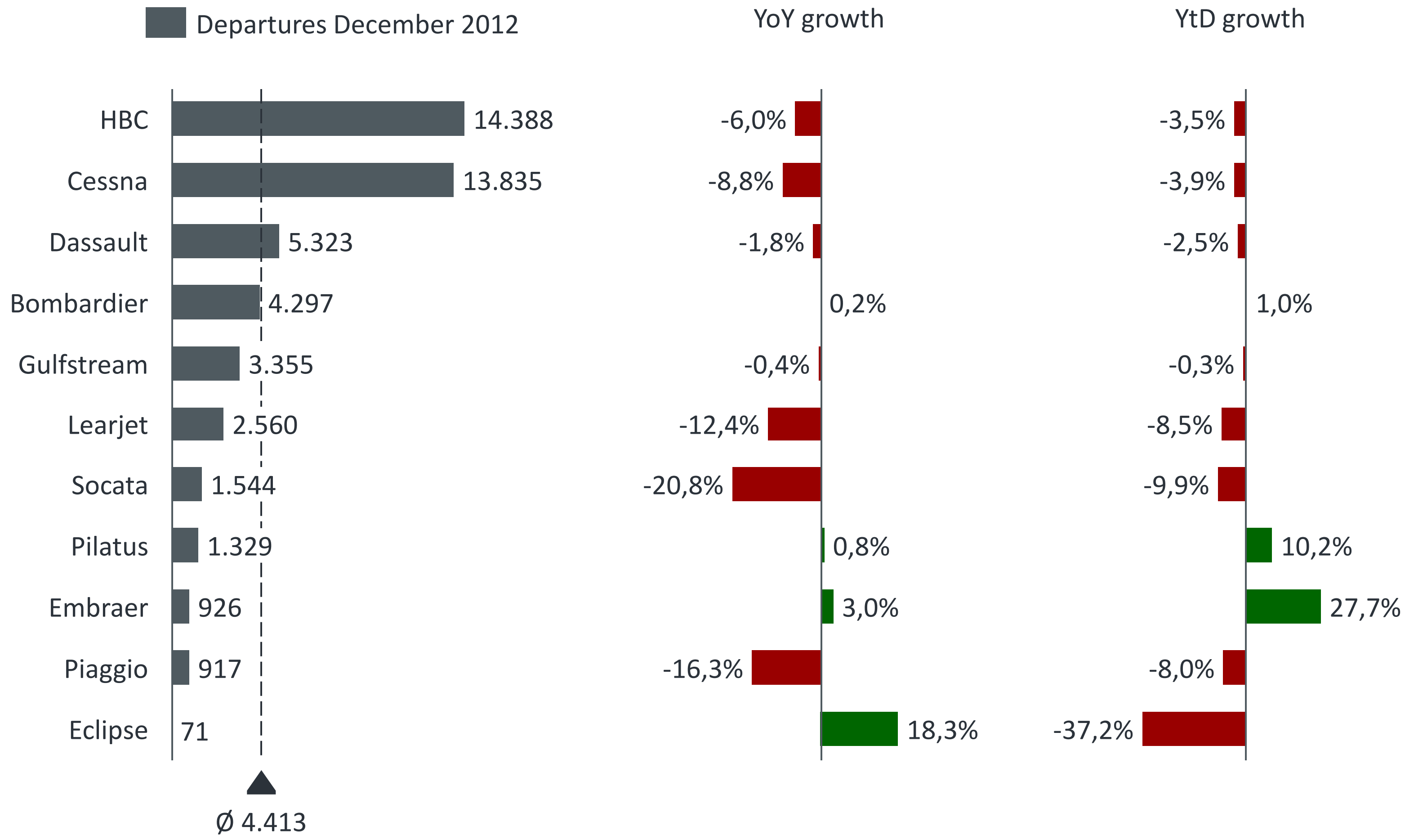




Only Embraer and Eclipse made tangible YoY gains in December. There were severe backwards steps from the Piaggio, Socata and Learjet fleet in particular.

OEM performance, departures

including: Jets, Turboprops and Pistons



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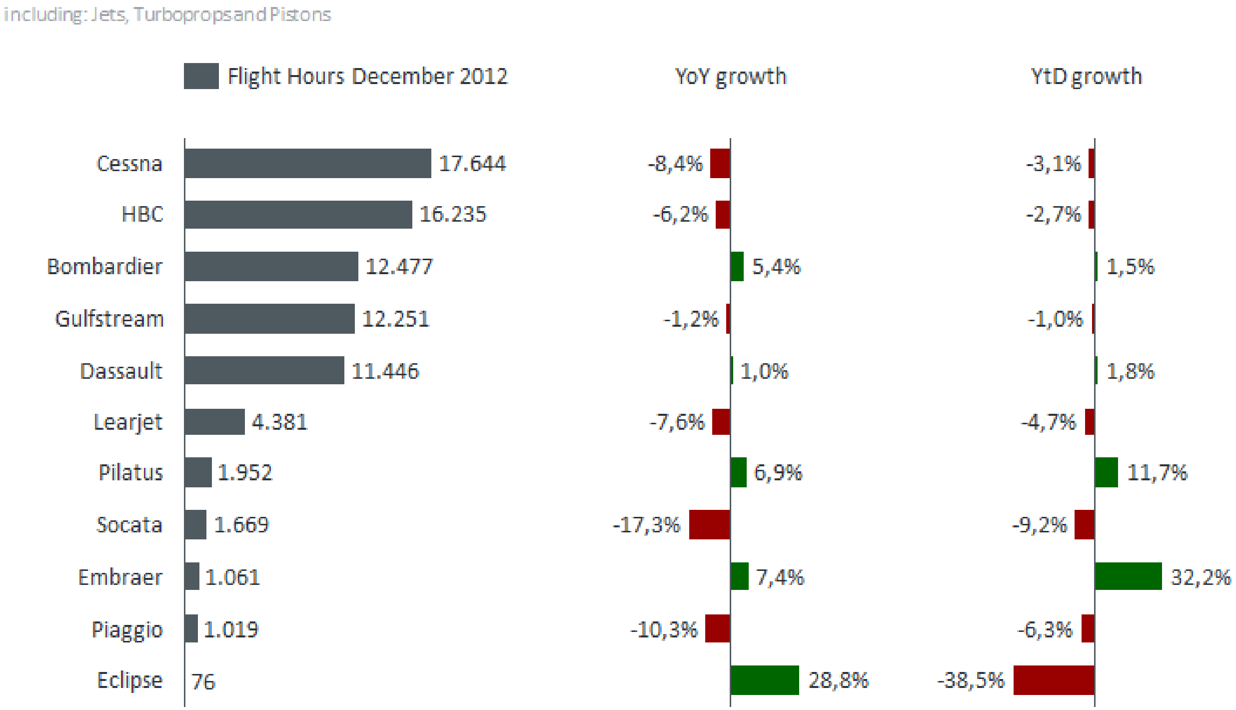
December reinforced an annual trend of aircraft flying further per trip (Bombardier, Learjet, Embraer, particularly Pilatus). Gulfstream is an exception.

OEM performance, hours



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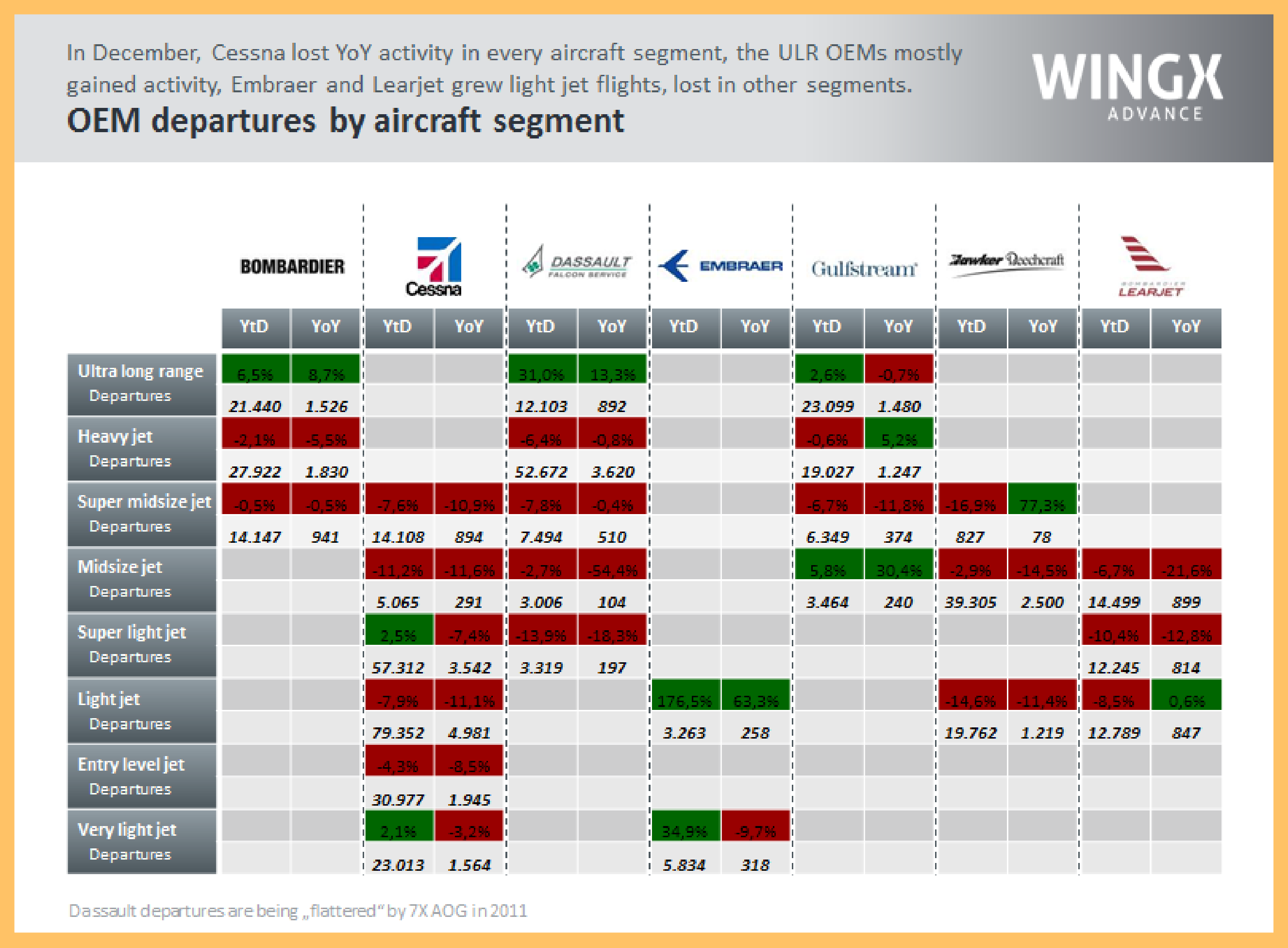

In December, Cessna lost YoY activity in every aircraft segment, the ULR OEMs mostly gained activity, Embraer and Learjet grew light jet flights, lost in other segments.

OEM departures by aircraft segment

	BOMBARDIER		Cessna		DASSAULT FALCON SERVICE		EMBRAER		Gulfstream		Hawker Beechcraft		BOMBARDIER LEARJET	
	YtD	YoY	YtD	YoY	YtD	YoY	YtD	YoY	YtD	YoY	YtD	YoY	YtD	YoY
Ultra long range	6,5%	8,7%			31,0%	13,3%			2,6%	-0,7%				
Departures	21.440	1.526			12.103	892			23.099	1.480				
Heavy jet	-2,1%	-5,5%			-6,4%	-0,8%			-0,6%	5,2%				
Departures	27.922	1.830			52.672	3.620			19.027	1.247				
Super midsize jet	-0,5%	-0,5%	-7,6%	-10,9%	-7,8%	-0,4%			-6,7%	-11,8%	-16,9%	77,3%		
Departures	14.147	941	14.108	894	7.494	510			6.349	374	827	78		
Midsize jet			-11,2%	-11,6%	-2,7%	-54,4%			5,8%	30,4%	-2,9%	-14,5%	-6,7%	-21,6%
Departures			5.065	291	3.006	104			3.464	240	39.305	2.500	14.499	899
Super light jet			2,5%	-7,4%	-13,9%	-18,3%							-10,4%	-12,8%
Departures			57.312	3.542	3.319	197							12.245	814
Light jet			-7,9%	-11,1%			176,5%	63,3%			-14,6%	-11,4%	-8,5%	0,6%
Departures			79.352	4.981			3.263	258			19.762	1.219	12.789	847
Entry level jet			-4,3%	-8,5%										
Departures			30.977	1.945										
Very light jet			2,1%	-3,2%			34,9%	-9,7%						
Departures			23.013	1.564			5.834	318						

Dassault departures are being „flattered" by 7X AOG in 2011

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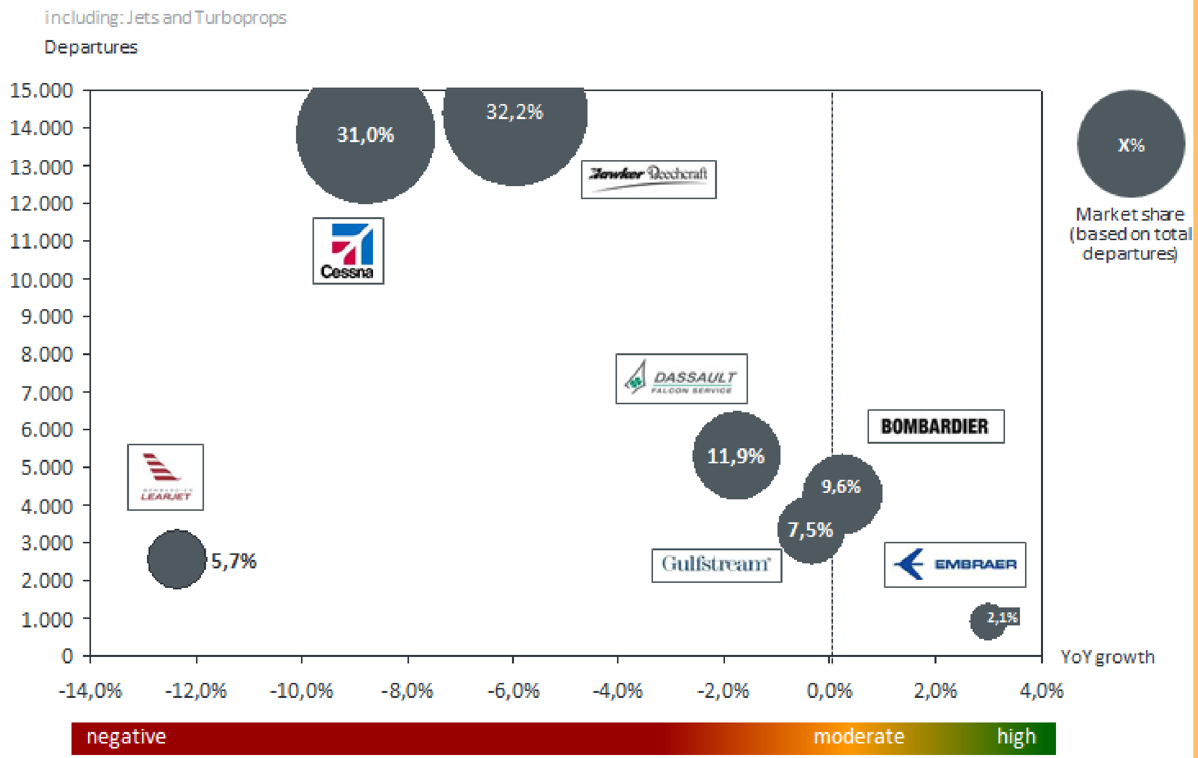
December saw market leaders Cessna and HBC lose significant activity YoY, though retaining 60% share. Embraer was the only clear winner, Learjet the biggest loser.

OEM by December departures and YoY growth



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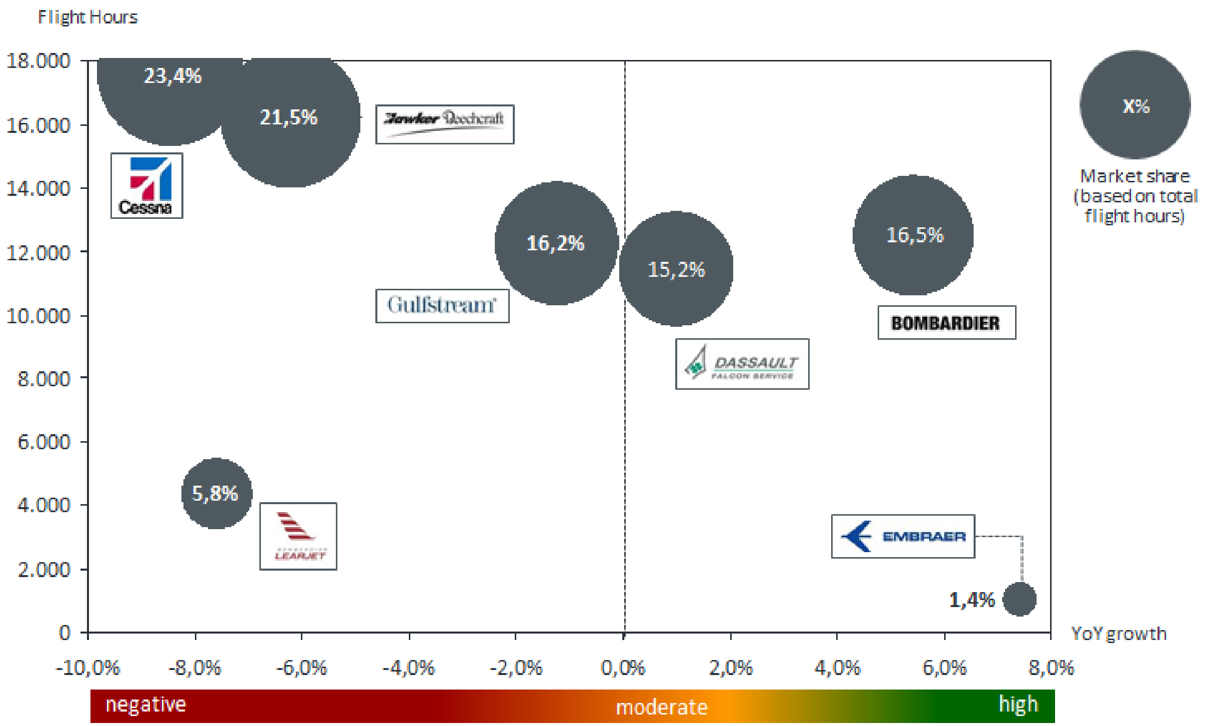
In terms of hours flown, the December YoY results were less bad, with Dassault and especially Bombardier picking up activity (as well as Embraer).

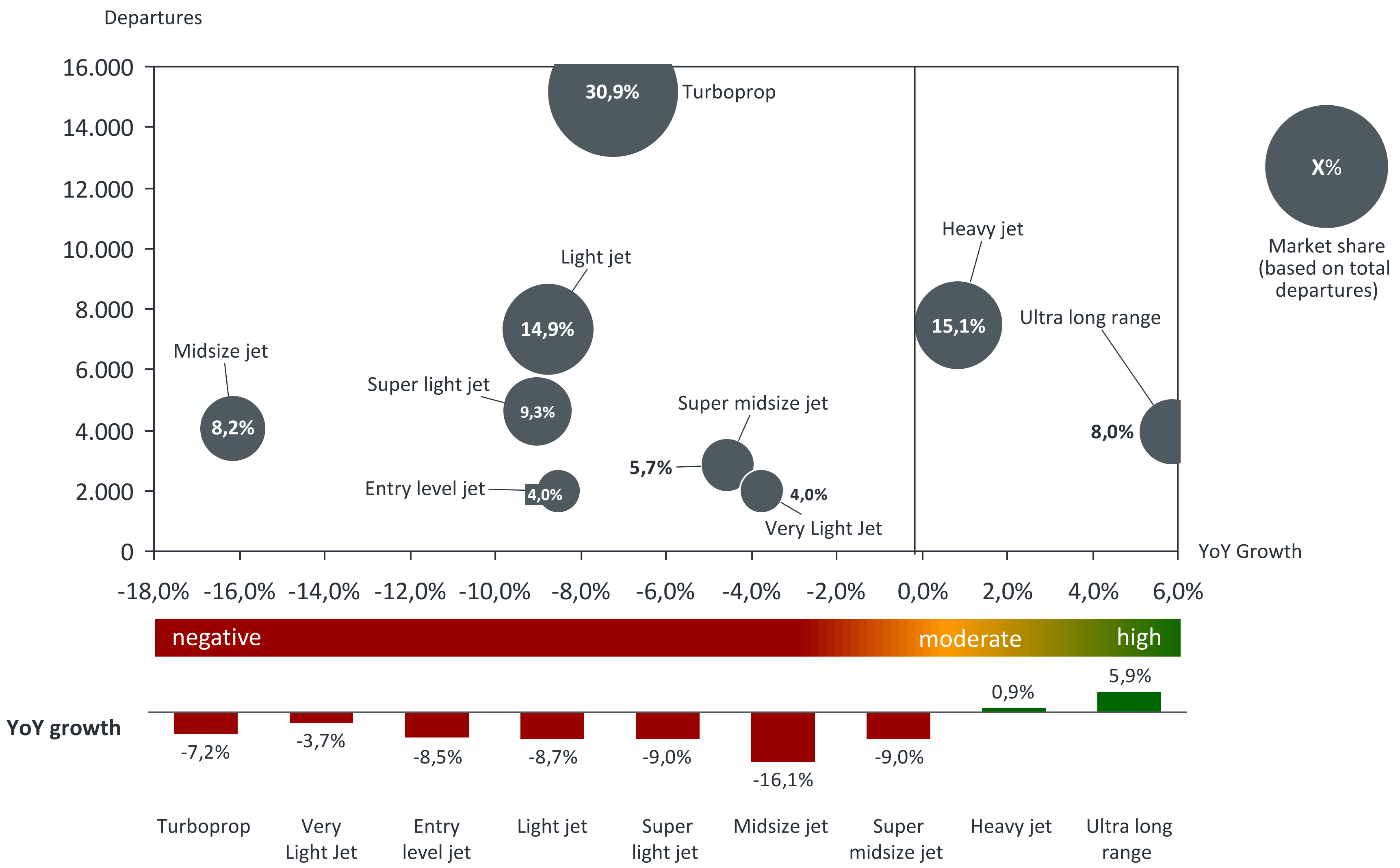
OEM by December flight hours and YoY growth

including: Jets and Turboprops



December saw YoY increases in heavy and ULR jet departures but the major market impact was the YoY fall in turboprop, light jet and midsize departures

Aircraft segment by December departures and YoY growth



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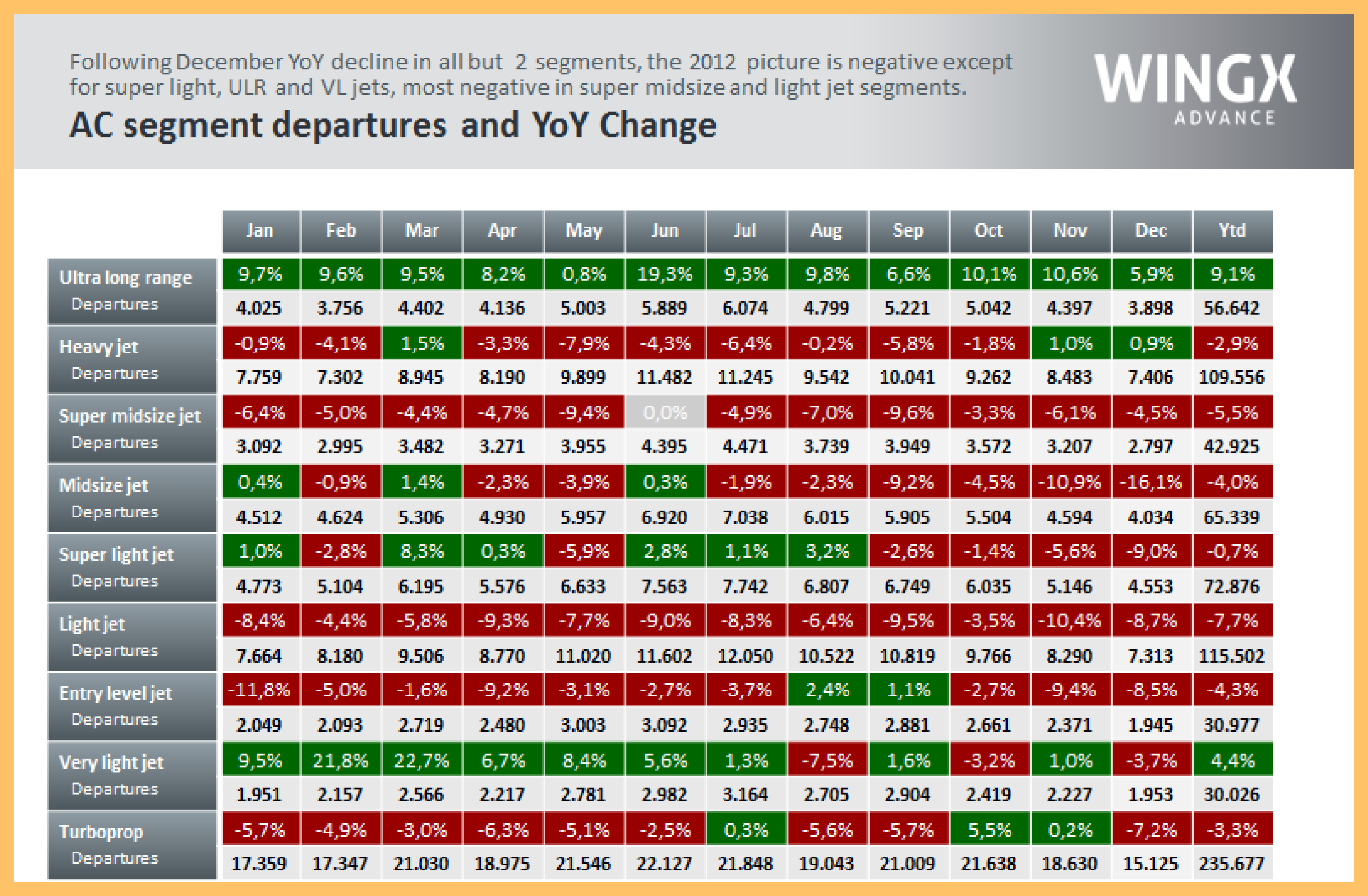

Following December YoY decline in all but 2 segments, the 2012 picture is negative except for super light, ULR and VL jets, most negative in super midsize and light jet segments.

AC segment departures and YoY Change

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Ytd
Ultra long range	9,7%	9,6%	9,5%	8,2%	0,8%	19,3%	9,3%	9,8%	6,6%	10,1%	10,6%	5,9%	9,1%
Departures	4.025	3.756	4.402	4.136	5.003	5.889	6.074	4.799	5.221	5.042	4.397	3.898	56.642
Heavy jet	-0,9%	-4,1%	1,5%	-3,3%	-7,9%	-4,3%	-6,4%	-0,2%	-5,8%	-1,8%	1,0%	0,9%	-2,9%
Departures	7.759	7.302	8.945	8.190	9.899	11.482	11.245	9.542	10.041	9.262	8.483	7.406	109.556
Super midsize jet	-6,4%	-5,0%	-4,4%	-4,7%	-9,4%	0,0%	-4,9%	-7,0%	-9,6%	-3,3%	-6,1%	-4,5%	-5,5%
Departures	3.092	2.995	3.482	3.271	3.955	4.395	4.471	3.739	3.949	3.572	3.207	2.797	42.925
Midsize jet	0,4%	-0,9%	1,4%	-2,3%	-3,9%	0,3%	-1,9%	-2,3%	-9,2%	-4,5%	-10,9%	-16,1%	-4,0%
Departures	4.512	4.624	5.306	4.930	5.957	6.920	7.038	6.015	5.905	5.504	4.594	4.034	65.339
Super light jet	1,0%	-2,8%	8,3%	0,3%	-5,9%	2,8%	1,1%	3,2%	-2,6%	-1,4%	-5,6%	-9,0%	-0,7%
Departures	4.773	5.104	6.195	5.576	6.633	7.563	7.742	6.807	6.749	6.035	5.146	4.553	72.876
Light jet	-8,4%	-4,4%	-5,8%	-9,3%	-7,7%	-9,0%	-8,3%	-6,4%	-9,5%	-3,5%	-10,4%	-8,7%	-7,7%
Departures	7.664	8.180	9.506	8.770	11.020	11.602	12.050	10.522	10.819	9.766	8.290	7.313	115.502
Entry level jet	-11,8%	-5,0%	-1,6%	-9,2%	-3,1%	-2,7%	-3,7%	2,4%	1,1%	-2,7%	-9,4%	-8,5%	-4,3%
Departures	2.049	2.093	2.719	2.480	3.003	3.092	2.935	2.748	2.881	2.661	2.371	1.945	30.977
Very light jet	9,5%	21,8%	22,7%	6,7%	8,4%	5,6%	1,3%	-7,5%	1,6%	-3,2%	1,0%	-3,7%	4,4%
Departures	1.951	2.157	2.566	2.217	2.781	2.982	3.164	2.705	2.904	2.419	2.227	1.953	30.026
Turboprop	-5,7%	-4,9%	-3,0%	-6,3%	-5,1%	-2,5%	0,3%	-5,6%	-5,7%	5,5%	0,2%	-7,2%	-3,3%
Departures	17.359	17.347	21.030	18.975	21.546	22.127	21.848	19.043	21.009	21.638	18.630	15.125	235.677

Following December YoY decline in all but ULR jet segments, the 2012 picture is negative except for super light, ULR and VL jets. Light jets lost activity YoY in every month of 2012.

AC segment flight hours and YoY Change

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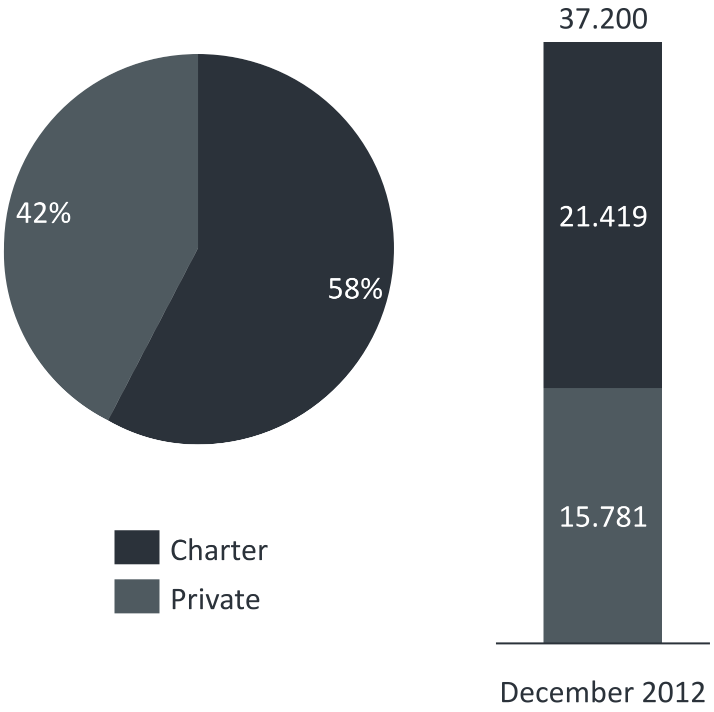
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Ytd
Ultra long range	10,2%	5,4%	13,0%	4,7%	-0,7%	15,6%	9,0%	6,9%	-0,6%	12,8%	6,1%	8,5%	7,5%
Flight hours	15.831	13.731	16.669	15.582	17.243	19.697	19.341	15.126	17.252	18.918	16.397	15.265	201.052
Heavy jet	0,1%	-5,0%	1,2%	-0,9%	-6,1%	-4,3%	-4,0%	5,2%	-4,8%	-5,5%	-0,5%	-0,7%	-2,3%
Flight hours	18.519	16.725	20.483	19.662	22.605	26.046	25.308	21.444	22.585	21.403	19.627	17.414	251.821
Super midsize jet	-4,4%	-7,6%	-1,5%	-6,7%	-8,7%	0,7%	-3,4%	-4,5%	-10,1%	-4,9%	-0,5%	-1,0%	-4,5%
Flight hours	5.574	5.291	6.119	5.925	7.023	7.750	7.818	6.831	6.728	6.490	5.829	5.230	76.607
Midsize jet	0,7%	-1,1%	1,2%	0,5%	-4,0%	0,4%	-2,8%	3,1%	-6,6%	-0,8%	-10,9%	-9,8%	-2,5%
Flight hours	7.354	7.122	8.222	7.998	9.288	10.656	10.934	9.894	9.405	9.124	7.366	6.671	104.034
Super light jet	2,1%	-0,4%	10,5%	0,9%	-3,5%	5,0%	1,0%	3,0%	-2,1%	-1,6%	-5,3%	-9,0%	0,2%
Flight hours	6.224	6.539	7.720	7.231	8.554	9.963	10.399	9.499	8.749	7.828	6.482	5.920	95.106
Light jet	-10,0%	-3,8%	-5,5%	-6,9%	-5,0%	-8,8%	-7,1%	-5,6%	-7,4%	-2,4%	-7,3%	-7,9%	-6,5%
Flight hours	9.950	10.663	12.213	11.631	14.331	15.394	16.384	14.543	14.632	12.869	11.045	9.600	153.257
Entry level jet	-9,3%	-2,2%	4,7%	-8,5%	-3,5%	0,8%	-2,1%	6,7%	5,5%	-1,8%	-8,9%	-9,5%	-2,0%
Flight hours	2.240	2.318	3.047	2.798	3.374	3.619	3.481	3.296	3.381	3.022	2.635	2.159	35.372
Very light jet	11,3%	21,7%	27,2%	6,8%	14,7%	10,3%	2,6%	-6,5%	2,7%	-1,2%	-2,2%	-3,0%	6,0%
Flight hours	2.220	2.503	2.962	2.638	3.421	3.697	3.937	3.367	3.566	2.917	2.549	2.262	36.038
Turboprop	-4,9%	-3,4%	-0,9%	-3,8%	-1,7%	-3,0%	-1,4%	-4,2%	-6,2%	3,8%	-2,0%	-7,7%	-2,8%
Flight hours	19.408	19.969	24.429	22.412	25.983	26.406	26.987	23.572	25.257	25.462	21.259	17.034	278.178

In December 2012 Charter activity represented the majority of overall flights. In contrast to November, Charter fell more than Private activity this month.

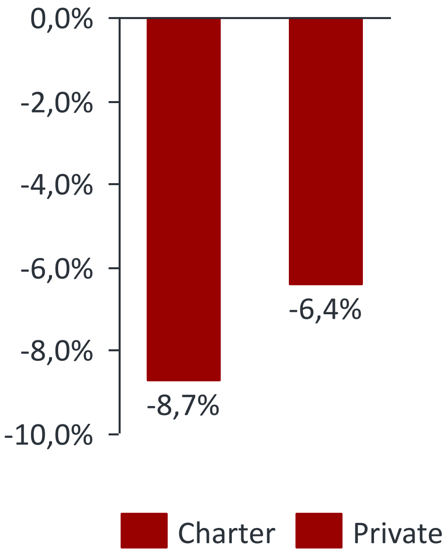
Traffic by mission December

including: Jets and Turboprops

Distribution of departures



YoY growth



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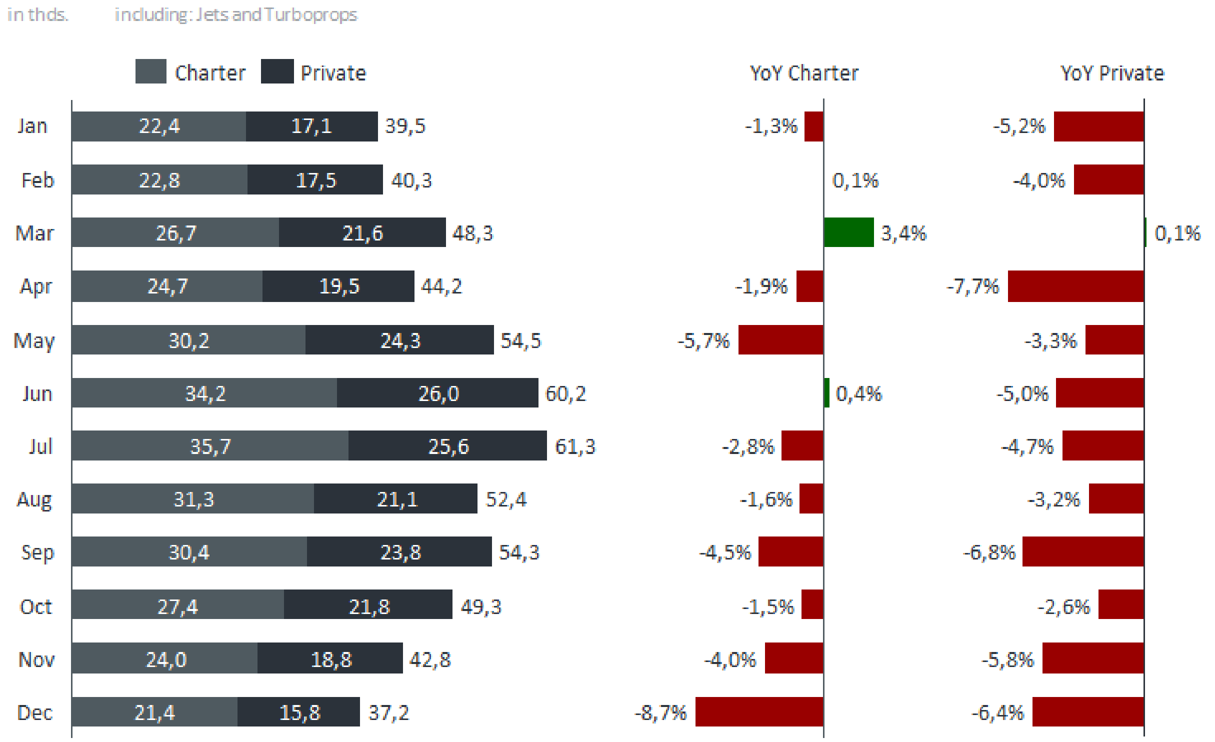
December marked the largest fall in monthly YoY charter activity during 2012. Private flight activity also fell significantly (and has mostly fallen further during 2012).

December and YoY departure trends by mission



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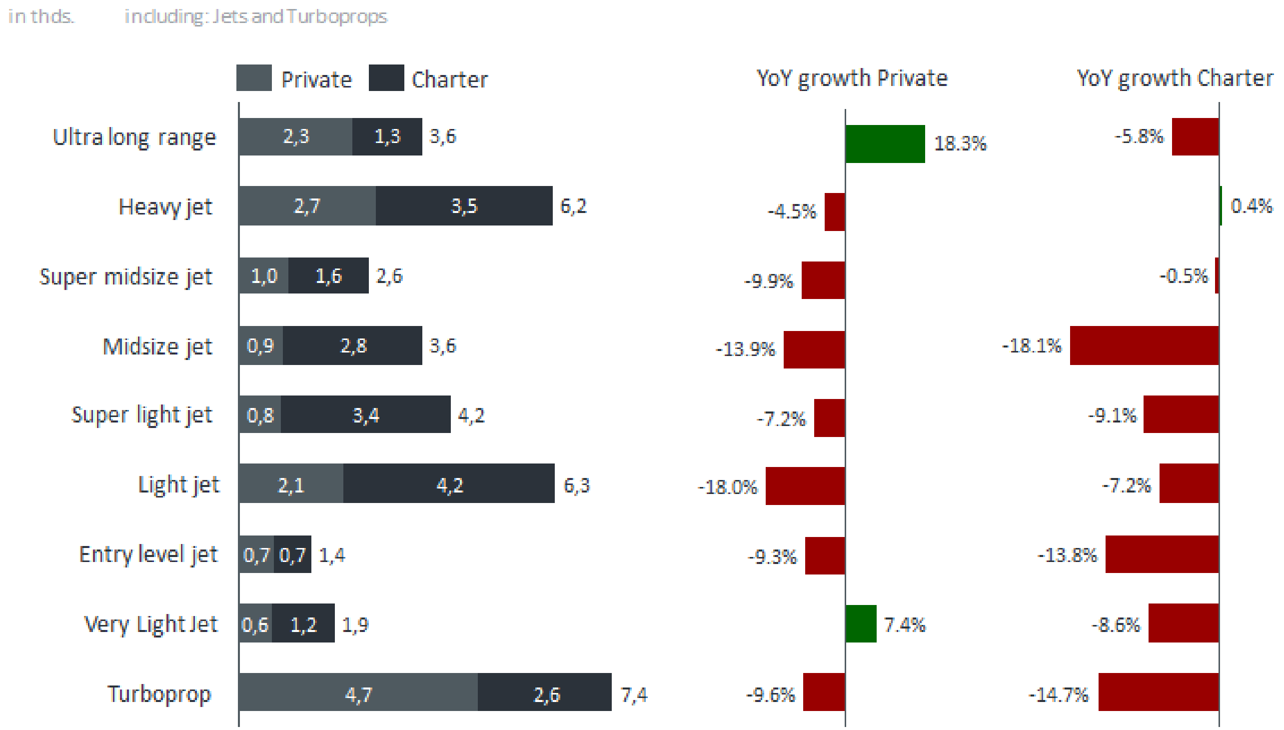
December´s charter activity YoY fell most in midsize, turboprop and entry level categories. Only heavy jet charter was stable. Private ULR and VL jet activity increased.

AC segment departures by mission



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December saw narrow gains from the OEMs specialising in large jets, and continued market penetration from Embraer, which may be at the expense of Cessna and HBC

Leading OEM activity performance by mission

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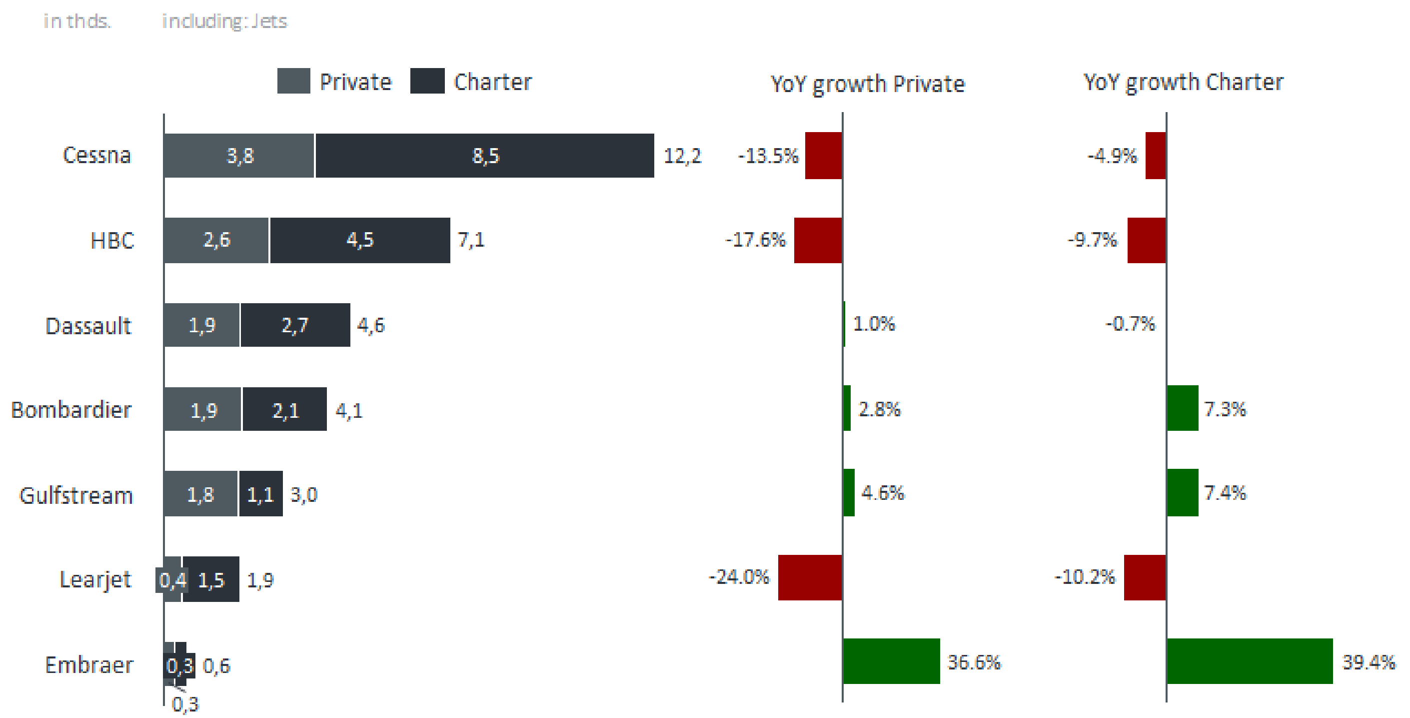
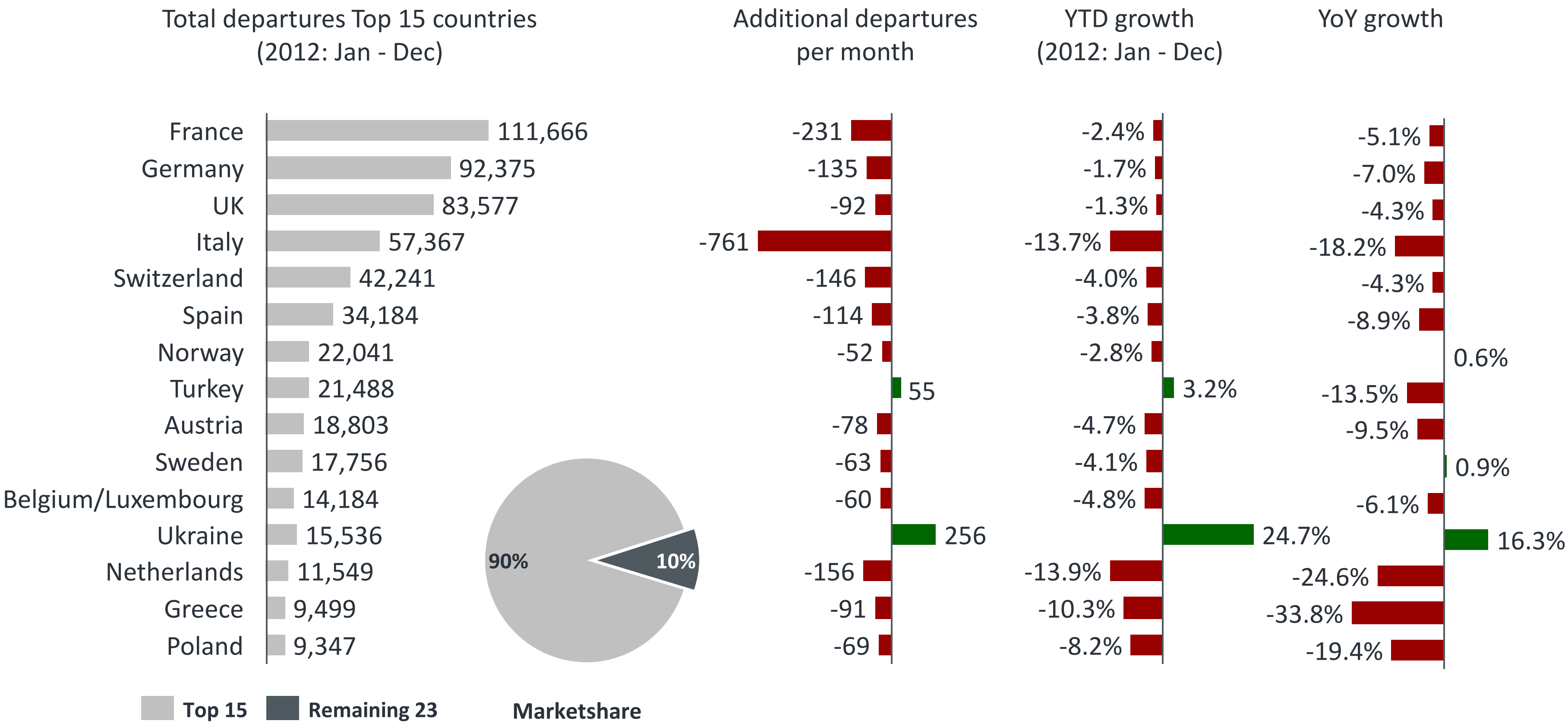


Over the year, Italy has contributed the largest regional decline in activity. Greece was a major loser in December. Turkey is positive YTD, but Ukraine is the stand-out 2012 success.

European growth pattern Top 15 European countries

WINGX ADVANCE

including: Jets, Turboprops and Pistons



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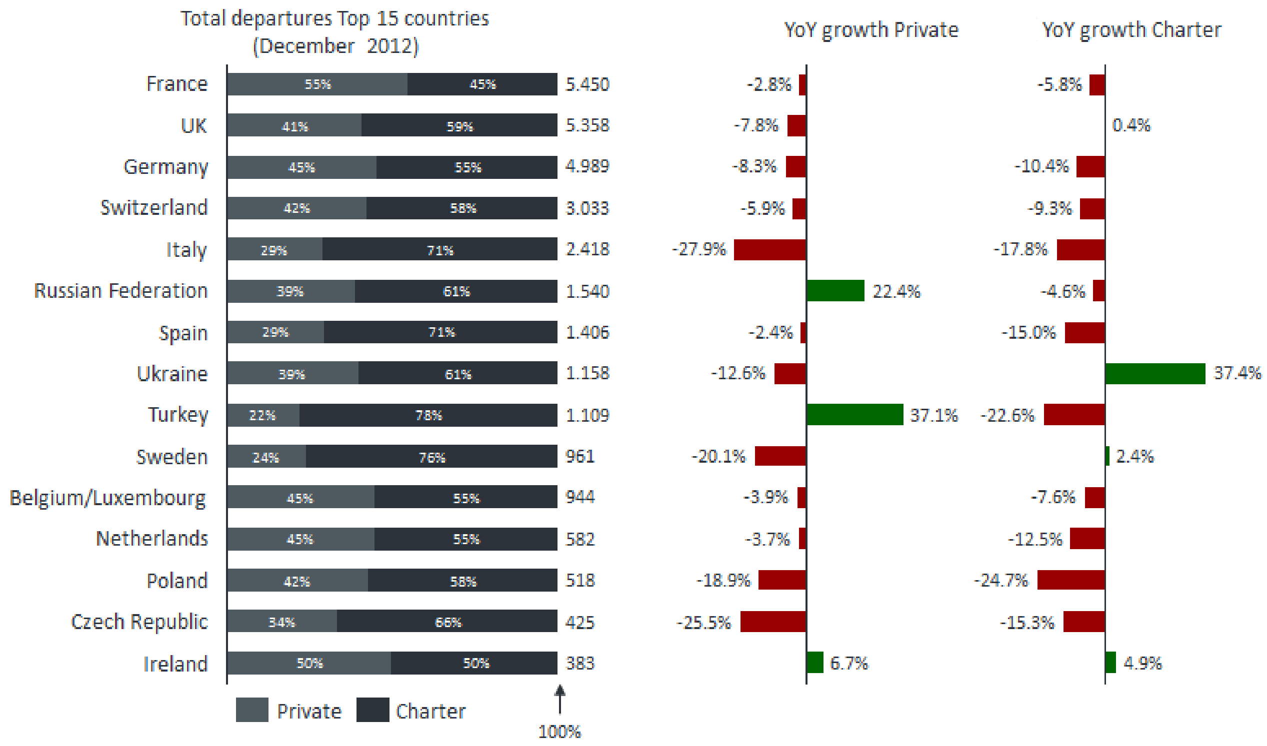
December analysis shows major contributions from charter in Ukraine and private in Turkey and Russia. The largest negative impacts are from falls in private departures ex-Italy.

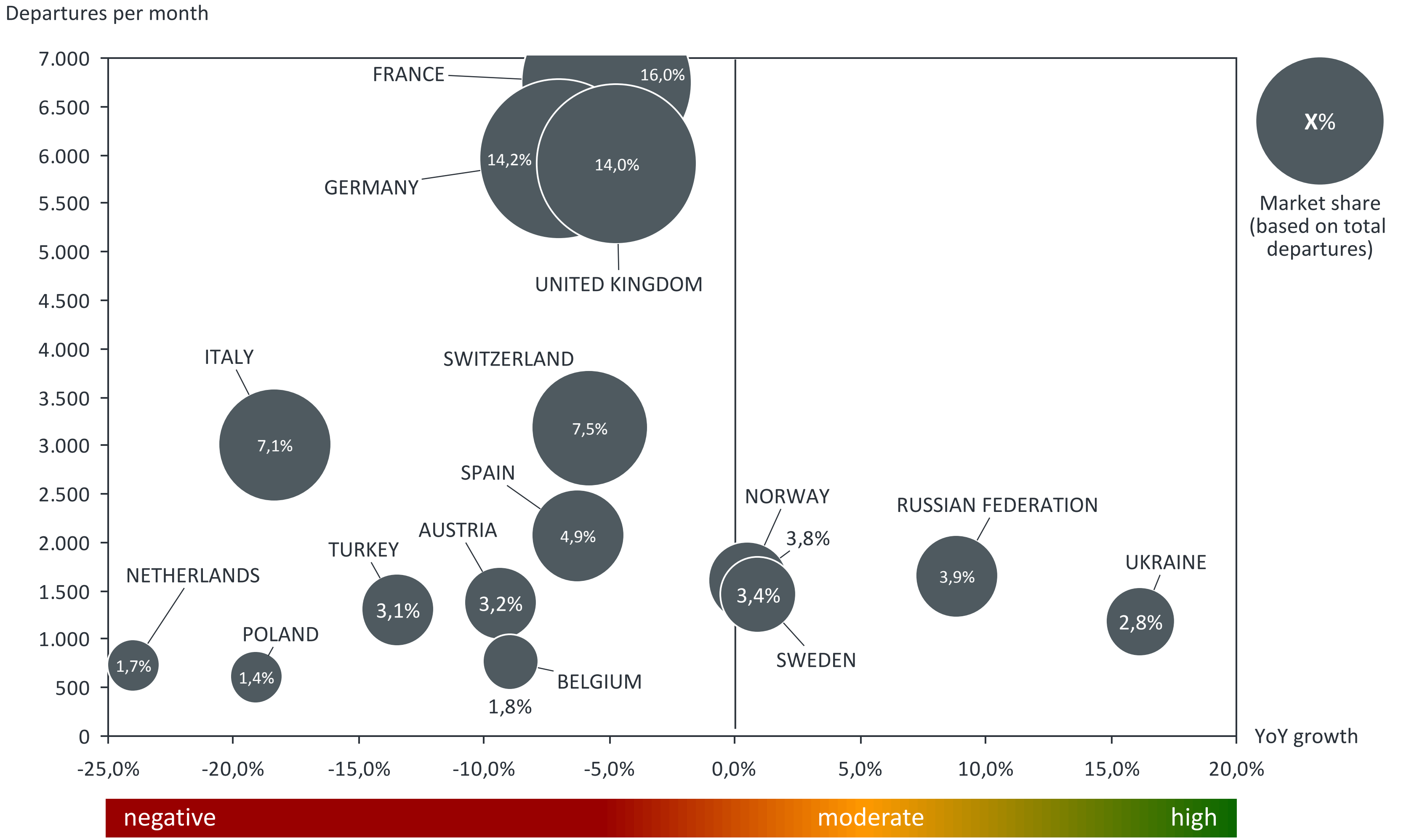
European growth pattern Top 15 European countries by mission



This analysis highlights Italy´s especially negative impact on December activity. The largest 3 regional markets are also at least 5% off YoY performance.

Top markets (plus Russia) activity in December

including: Jets, Turboprops and Pistons



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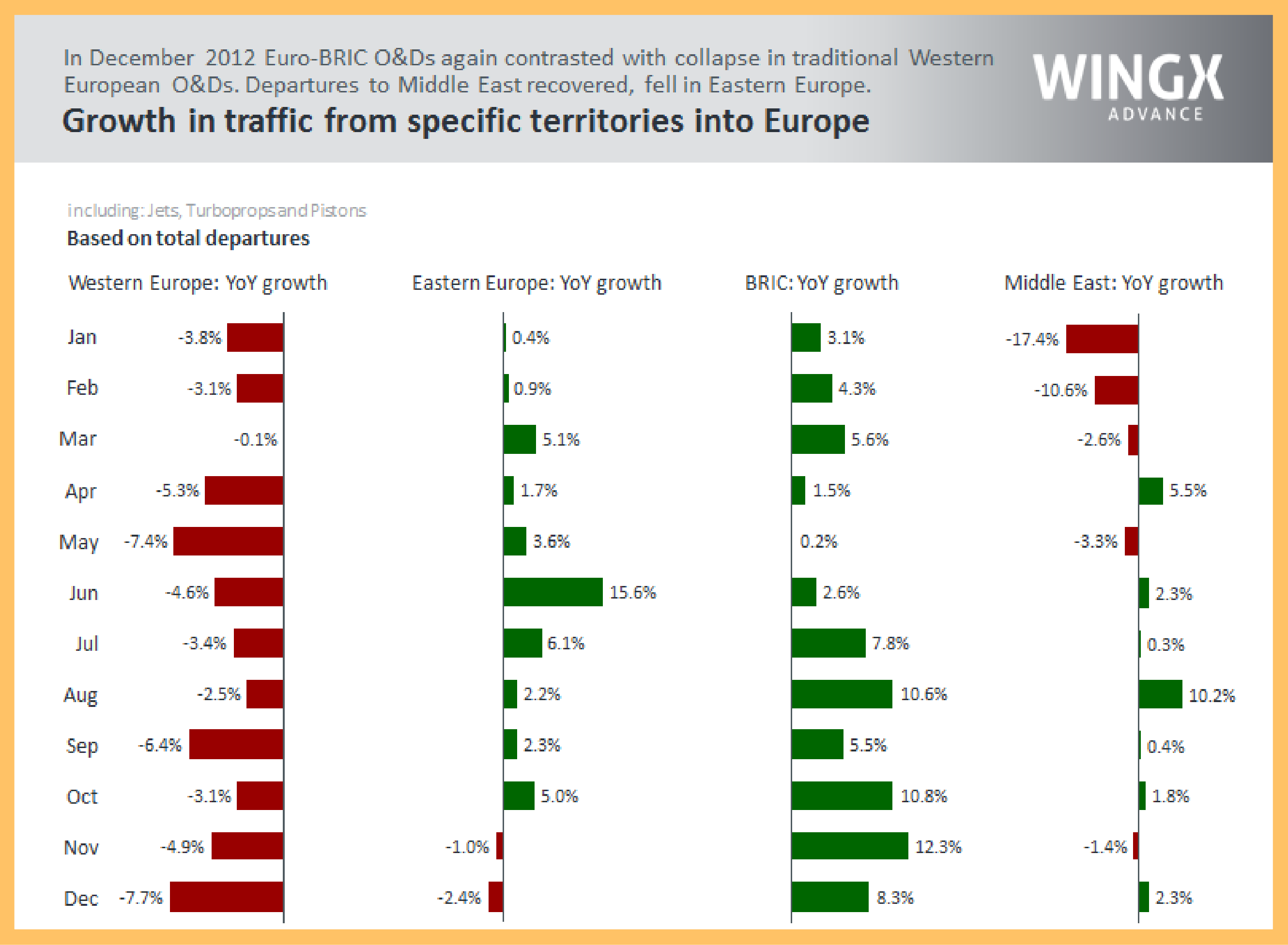
Departures from the Middle East recovered, fell from Eastern Europe.



In December 2012 Euro-BRIC O&Ds again contrasted with collapse in traditional Western European O&Ds. Departures to Middle East recovered, fell in Eastern Europe.

Growth in traffic from specific territories into Europe

including: Jets, Turboprops and Pistons

Based on total departures

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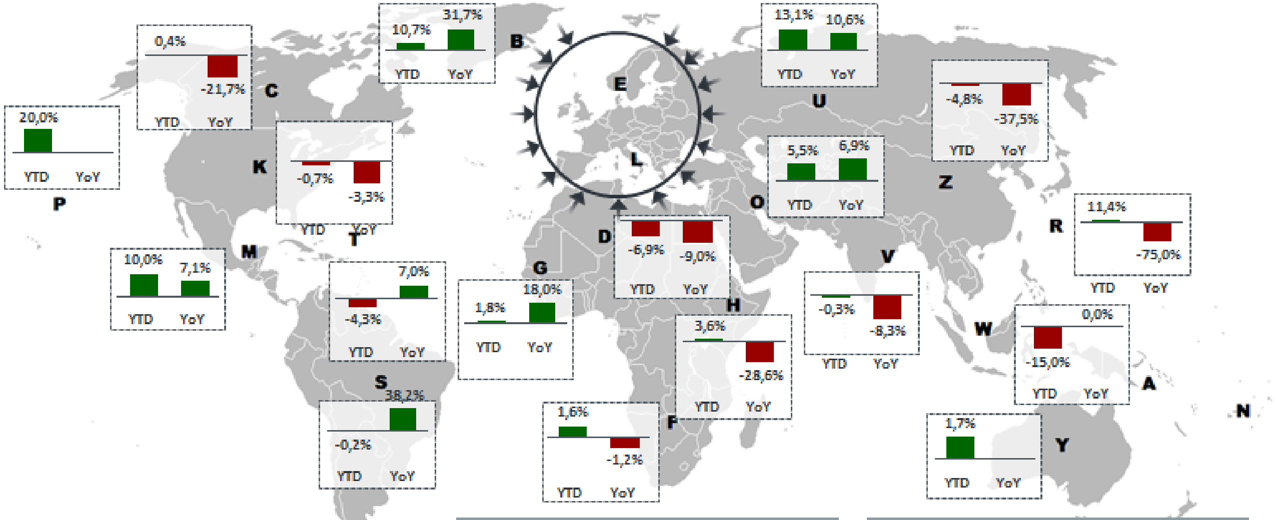
December maintained YTD strong contribution of Russia-origin activity, and African departures jumped, but Asian activity fell back and ex-US traffic is weak.

Flight pattern into Europe (YtD and YoY)



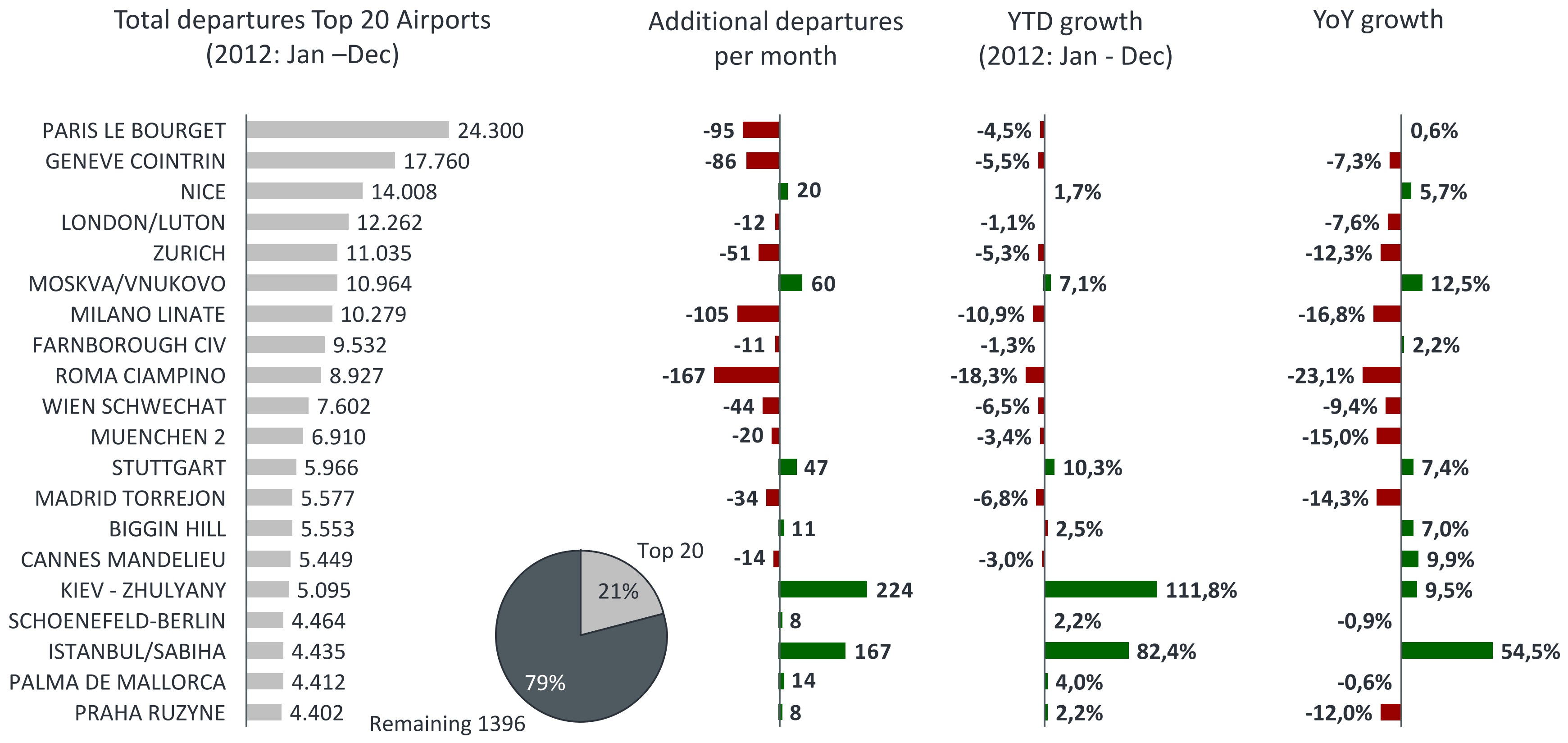
Origin Regions	YtD departures	YtD growth	YoY growth
U-Region	38.633	13,1%	10,6%
G-Region	8.523	1,8%	18,0%
K-Region	8.092	-0,3%	5,6%
O-Region	7.382	5,5%	6,9%
D-Region	2.422	-6,9%	-9,0%
H-Region	2.129	3,6%	-28,6%

Origin Regions	YtD departures	YtD growth	YoY growth
C-Region	2.031	0,4%	-21,7%
B-Region	1.291	10,7%	31,7%
Z-Region	950	-4,8%	-37,5%
F-Region	834	1,6%	-1,2%
V-Region	637	-0,3%	-8,3%
S-Region	498	-0,2%	38,2%

Origin Regions	YtD departures	YtD growth	YoY growth
T-Region	421	-4,3%	7,0%
M-Region	340	10,0%	7,1%
R-Region	117	11,4%	-75,0%
W-Region	61	1,7%	0,0%
A-Region	34	-15,0%	-50,0%
P-Region	12	20,0%	0,0%

December maintained Istanbul Sabiha´s strong growth, with much slower growth in Kiev Zhulyany. Roma Ciampino and Milano Linate lost the most traffic YoY.

Top 20 Airport departures



	Total departures Top 20 Airports (2012: Jan –Dec)	Additional departures per month	YTD growth (2012: Jan - Dec)	YoY growth
PARIS LE BOURGET	24.300	-95	-4,5%	0,6%
GENEVE COINTRIN	17.760	-86	-5,5%	-7,3%
NICE	14.008	20	1,7%	5,7%
LONDON/LUTON	12.262	-12	-1,1%	-7,6%
ZURICH	11.035	-51	-5,3%	-12,3%
MOSKVA/VNUKOVO	10.964	60	7,1%	12,5%
MILANO LINATE	10.279	-105	-10,9%	-16,8%
FARNBOROUGH CIV	9.532	-11	-1,3%	2,2%
ROMA CIAMPINO	8.927	-167	-18,3%	-23,1%
WIEN SCHWECHAT	7.602	-44	-6,5%	-9,4%
MUENCHEN 2	6.910	-20	-3,4%	-15,0%
STUTTGART	5.966	47	10,3%	7,4%
MADRID TORREJON	5.577	-34	-6,8%	-14,3%
BIGGIN HILL	5.553	11	2,5%	7,0%
CANNES MANDELIEU	5.449	-14	-3,0%	9,9%
KIEV - ZHULYANY	5.095	224	111,8%	9,5%
SCHOENEFELD-BERLIN	4.464	8	2,2%	-0,9%
ISTANBUL/SABIHA	4.435	167	82,4%	54,5%
PALMA DE MALLORCA	4.412	14	4,0%	-0,6%
PRAHA RUZYNE	4.402	8	2,2%	-12,0%

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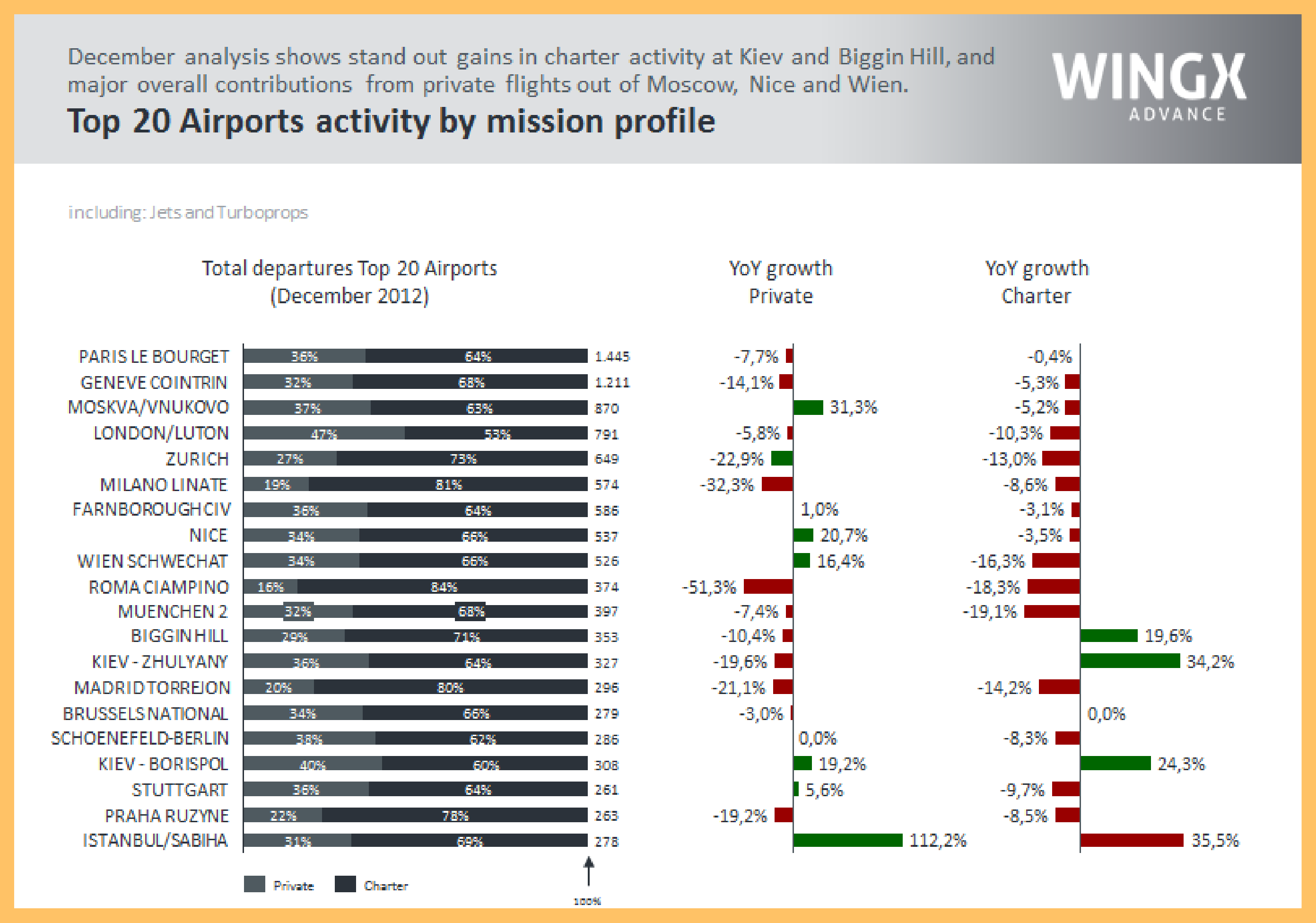


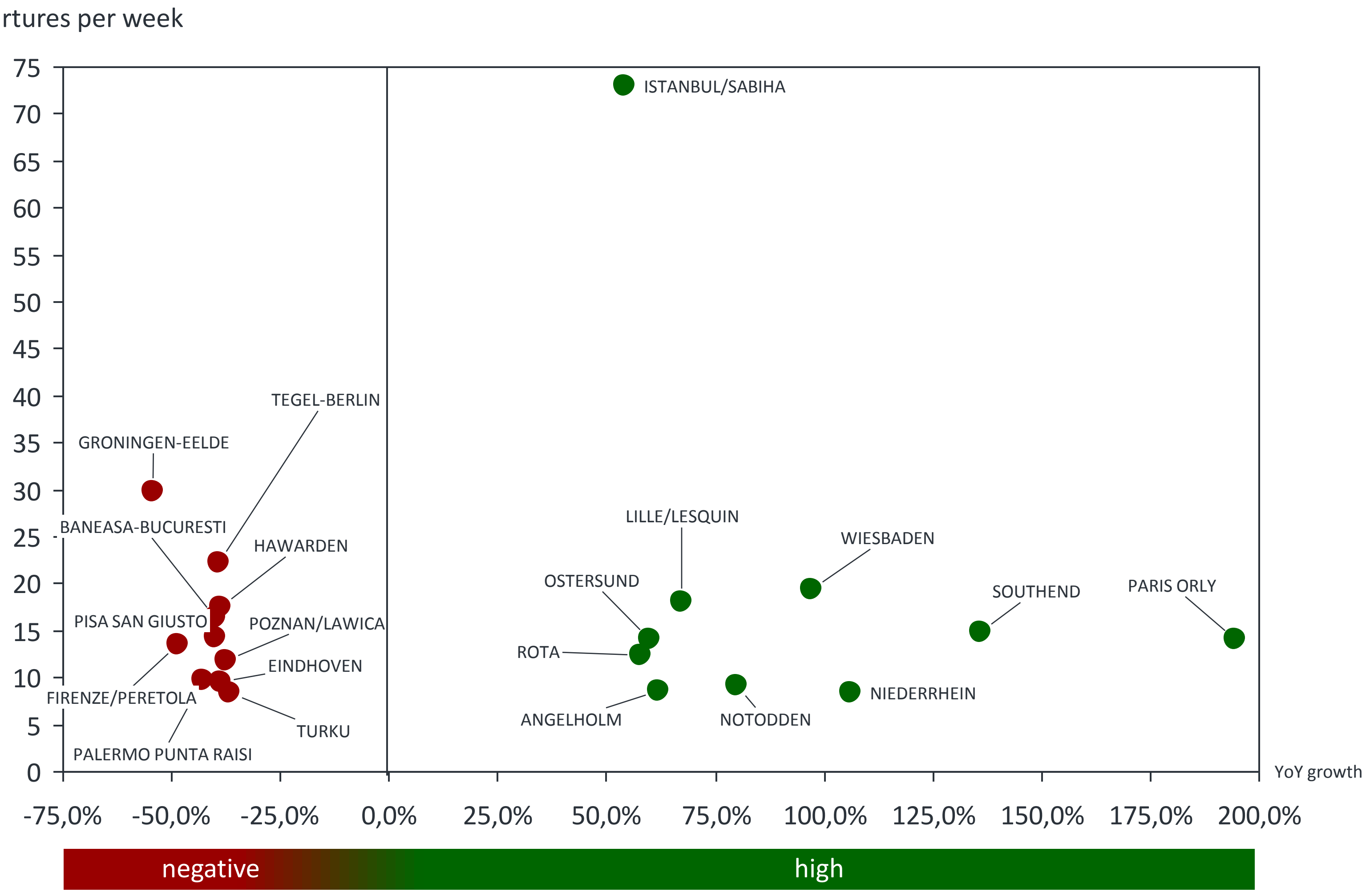
December analysis shows stand out gains in charter activity at Kiev and Biggin Hill, and major overall contributions from private flights out of Moscow, Nice and Wien.

Top 20 Airports activity by mission profile

including: Jets and Turboprops

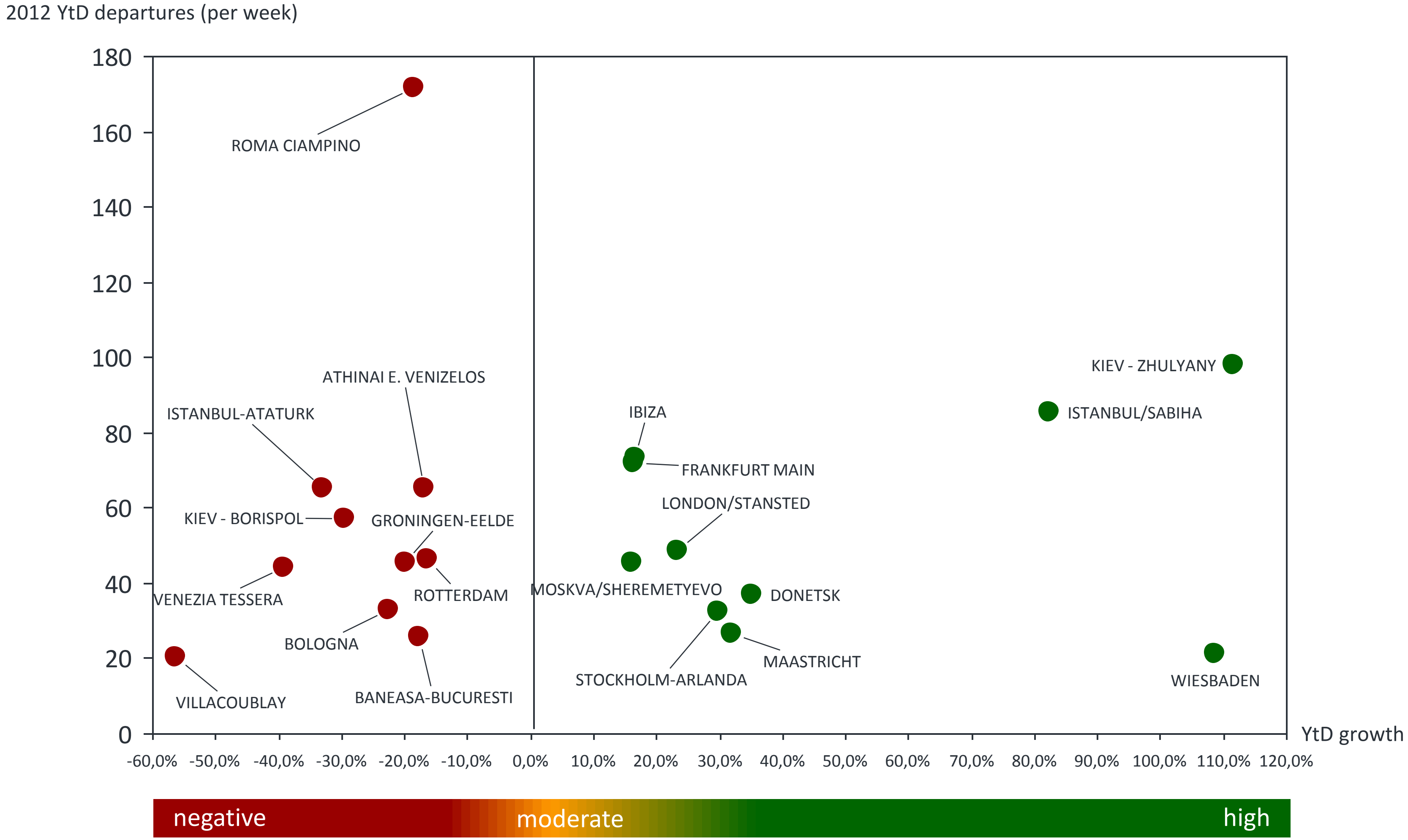
Predictably Italian airports suffered biggest falls in December activity, less expected were German airport declines, and big gains from Istanbul, Sabiha and Paris, Orly.

Best and worst performing airports by December activity



During the whole of 2012, evident creation of new business aviation hubs in Kiev and Istanbul. Unsurprising heavy losses in Italian, Spanish and Greek airports.

Best and worst performing airports by YtD activity



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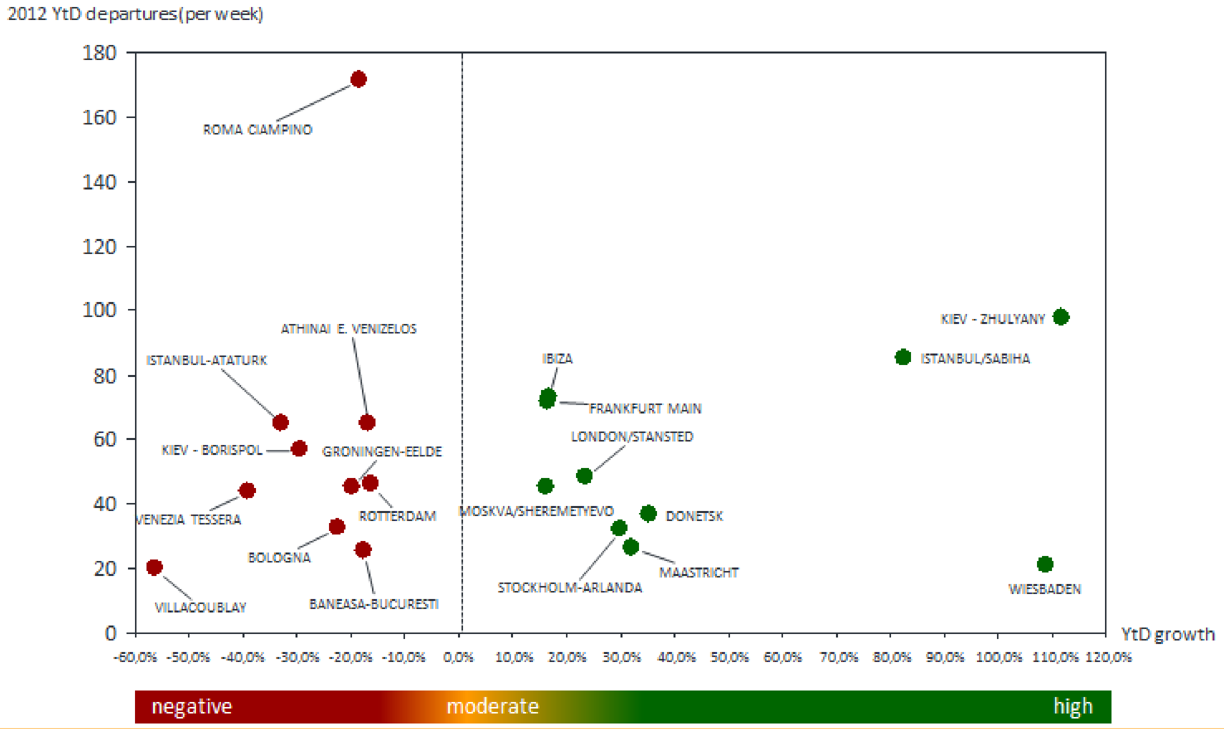
During the whole of 2012, evident creation of new business aviation hubs in Kiev and Istanbul. Unsurprising heavy losses in Italian, Spanish and Greek airports.

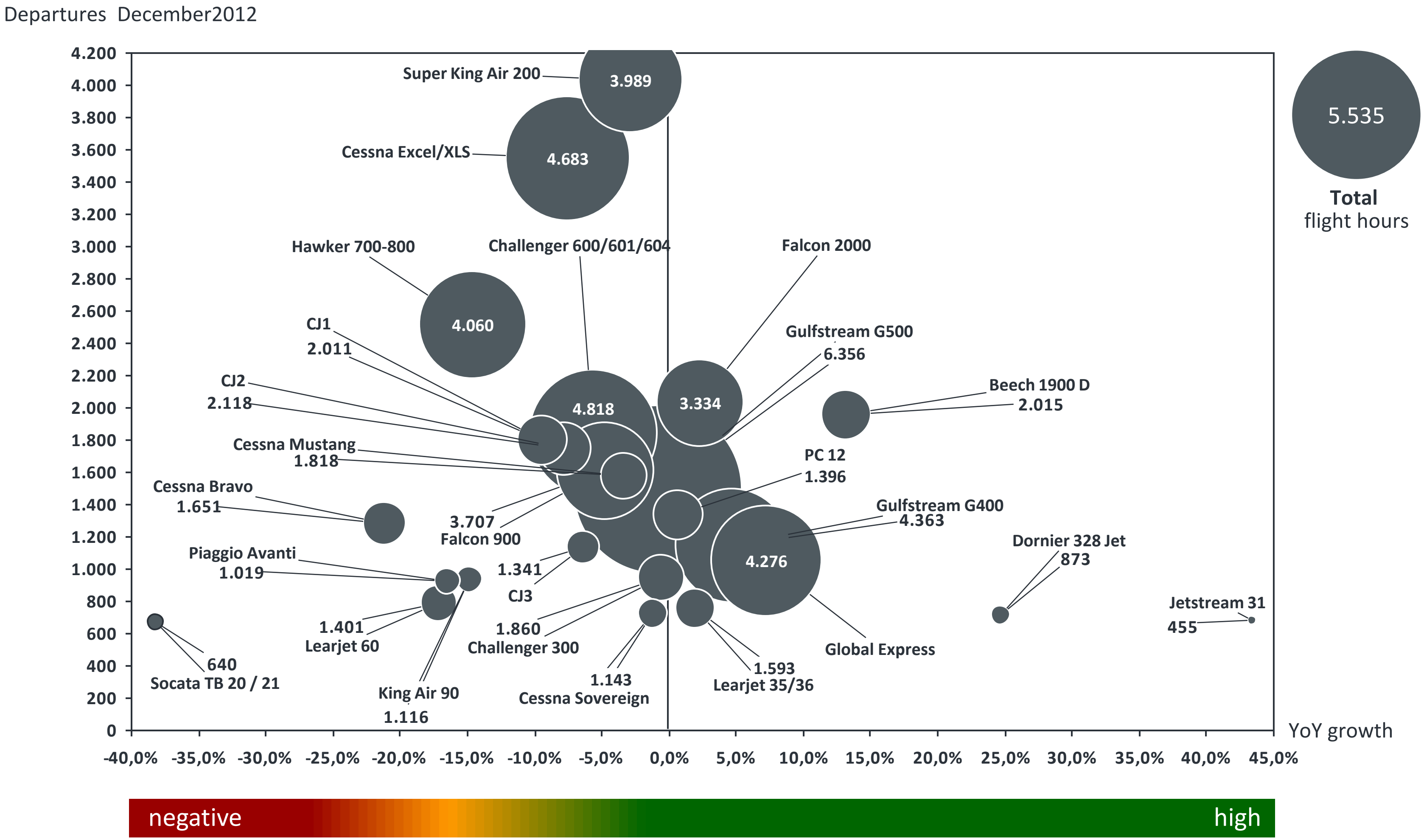
Best and worst performing airports by YtD activity

WINGX ADVANCE



December activity showed strong YoY performance from some heavy jets, notably Gulfstream G500, G400, Global Express. Hawker 700-800 and Bravos usage well down.

Top 25 Aircraft December 2012 activity



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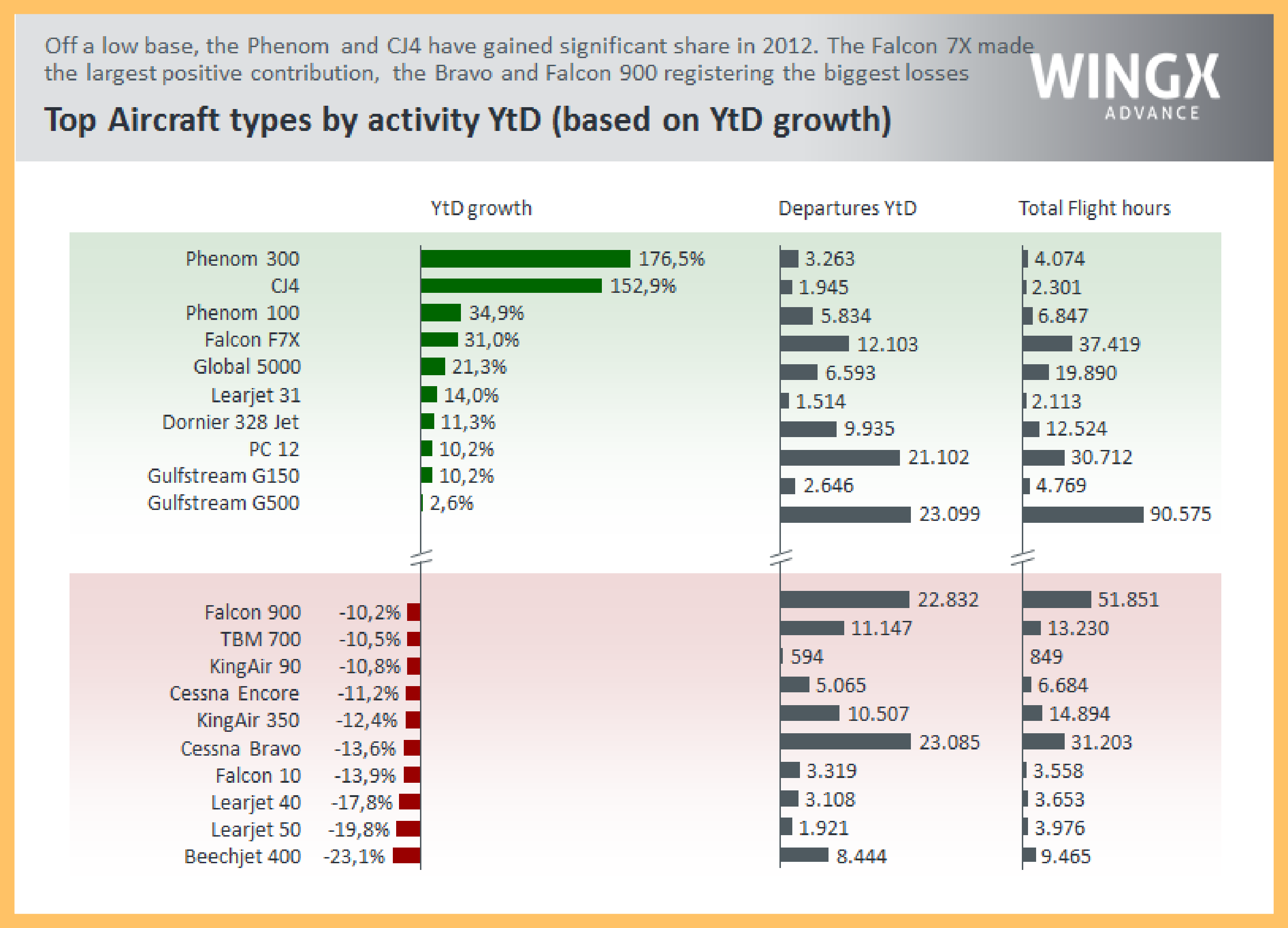

Off a low base, the Phenom and CJ4 have gained significant share in 2012. The Falcon 7X made the largest positive contribution, the Bravo and Falcon 900 registering the biggest losses

Top Aircraft types by activity YtD (based on YtD growth)

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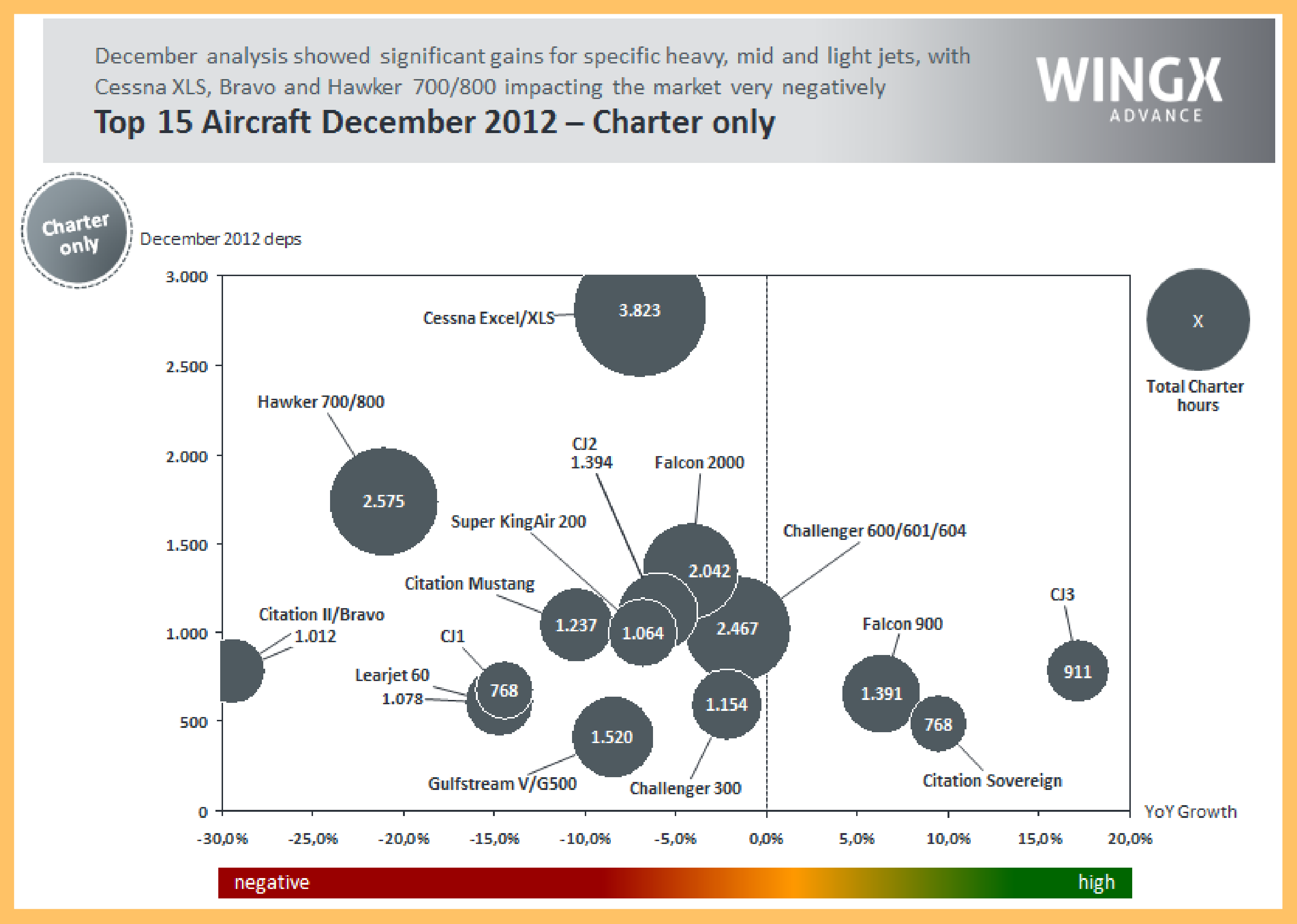

December analysis showed significant gains for specific heavy, mid and light jets, with Cessna XLS, Bravo and Hawker 700/800 impacting the market very negatively

Top 15 Aircraft December 2012 – Charter only

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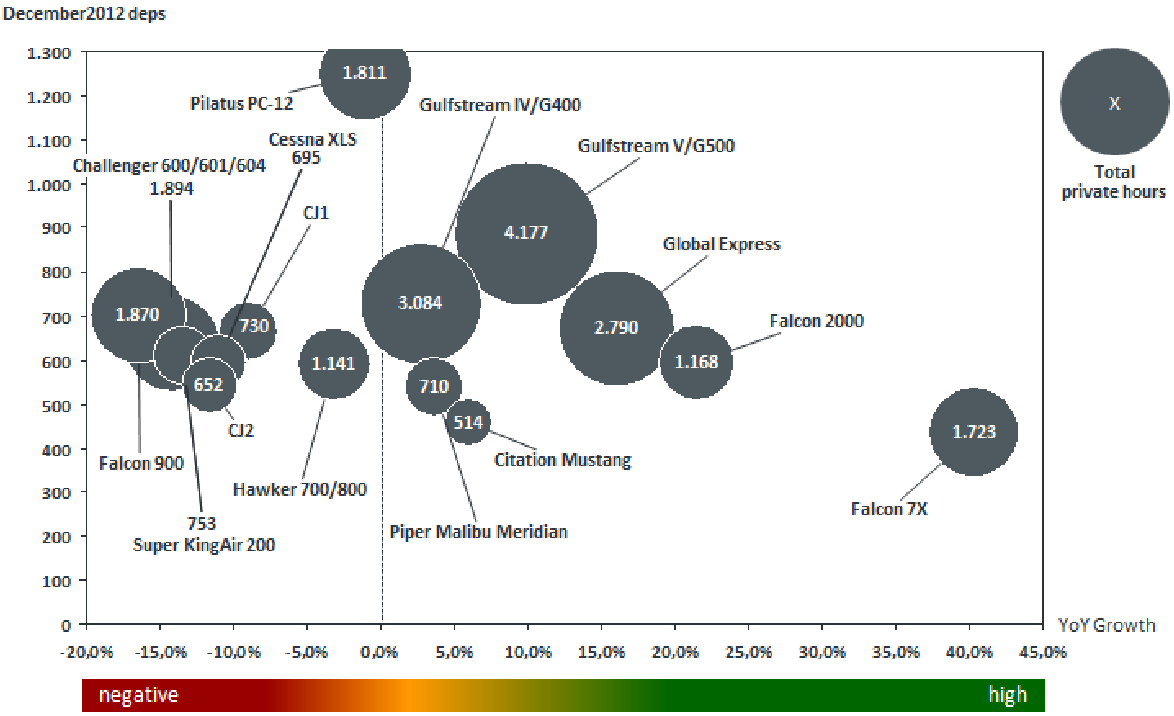
December analysis of private flights shows emphatic gains from several leading heavy and ULR jet types, with Falcon 900 and Challenger 600 heavily disfavoured

Top 15 Aircraft December 2012 – Private only

Private only



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The most popular private trip city pair in December was Paris-Geneva, there were big gains on O&Ds within Ukraine and gains on specific non-hub to hub routes across the EU region

Top 30 City pairs in December2012 – Private only

Private only

Private: Top 30 City Pairs 2012 (with change in frequency compared to December2011)

Rank	City Pair	Freq.	+ /-
1.	GENEVE -PARIS LE BOURGET	25	4
2.	PARIS LE BOURGET-GENEVE COINTRIN	23	-2
3.	KIEV - ZHULYANY-DONETSK	18	10
4.	DONETSK-KIEV - ZHULYANY	17	6
5.	PARIS LE BOURGET-CLERMONT	13	3
6.	BOURNEMOUTH/HURN-GENEVE	12	5
7.	CLERMONT--PARIS LE BOURGET	11	1
8.	KISHINEV-MOSKVA/VNUKOVO	11	3
9.	DNEPROPETROVSK-KIEV - BORISPOL	10	1
10.	ALTENRHEIN-SCHWAEB.HALL-HESSENT	10	-3

Rank	City Pair	Freq.	+ /-
11.	KLAGENFURT-WIEN SCHWECHAT	10	0
12.	STUTTGART-SALZBURG	9	4
13.	SCHWAEB.HALL-HESSENT-ALTENRHEIN	9	1
14.	LONDON/LUTON-TETERBORO	9	-7
15.	IBIZA-BALE-MULHOUSE	9	5
16.	BALE-MULHOUSE-IBIZA	9	5
17.	HELSINKI-VANTAA-SANKT-PETERBURG	8	8
18.	MOSKVA/VNUKOVO-NICE	8	4
19.	MOSKVA/VNUKOVO-KIEV - BORISPOL	8	4
20.	INGOLSTADT-BRAUNSCHWEIG	8	-9

Rank	City Pair	Freq.	+ /-
21.	DUESSELDORF-FRIEDRICHSHAFEN	8	-2
22.	JEDDAH-BEIRUT	8	8
23.	MOSKVA/VNUKOVO-GENEVE COINTRIN	8	0
24.	FRIEDRICHSHAFEN-DUESSELDORF	8	-3
25.	SURCIN-BEOGRAD-MOSKVA/VNUKOVO	8	3
26.	BEIRUT-LARNACA	8	1
27.	SANKT-PETERBURG-HELSINKI-VANTAA	8	8
28.	WIEN SCHWECHAT-VNUKOVO	8	8
29.	LONDON/LUTON-DUBLIN	8	4
30	WIEN SCHWECHAT-KLAGENFURT	8	-2

Business Aviation INSIGHT – 2012 review

Special INSIGHT edition

December analysis of charter flight O&Ds shows big losses on the most popular EU major city links, stand out gains from Geneva-Farnborough and Zurich-Paris

Top 30 City pairs in December2012 – Charter only

Charter: Top 30 City Pairs 2012 (with change in frequency compared to December2011)

Rank	City Pair	Freq.	+ /-
1.	MILANO LINATE-ROMA CIAMPINO	94	8
2.	ROMA CIAMPINO-MILANO LINATE	80	-11
3.	PARIS LE BOURGET-GENEVE	68	-36
4.	GENEVE COINTRIN-PARIS LBG	67	-49
5.	MOSKVA/VNUKOVO-GENEVE	33	0
6.	KIEV - ZHULYANY-DONETSK	24	17
7.	ANKARA-ESENBOGA-ISTANBUL	24	8
8.	GENEVE FARNBOROUGH	22	14
9.	DONETSK-KIEV - ZHULYANY	20	14
10.	ZURICH-PARIS LE BOURGET	20	10

Rank	City Pair	Freq.	+ /-
11.	BRAUNSCHWEIG-INGOLSTADT	19	19
12.	INGOLSTADT-BRAUNSCHWEIG	19	15
13.	GENEVE COINTRIN-MOSKVA/VNUKOVO	17	-17
14.	ISTANBUL/SABIHA-ISTANBUL-ATATURK	17	-1
15.	ANKARA-ESENBOGA-ISTANBUL/SABIHA	16	1
16.	LONDON/LUTON-MOSKVA/VNUKOVO	16	9
17.	MOSKVA/VNUKOVO-PARIS LBG	16	6
18.	MILANO LINATE-PARIS LE BOURGET	16	2
19.	NICE-PARIS LE BOURGET	15	5
20.	ISTANBUL-ATATURK-ISTANBUL/SABIHA	15	7

Rank	City Pair	Freq.	+ /-
21.	ISTANBUL-ATATURK-ANKARA	15	-4
22.	BRISTOL/LULSGATE-GUERNSEY	14	7
23.	LONDON/CITY-PARIS LE BOURGET	14	5
24.	FARNBOROUGH CIV-PARIS LE BOURGET	13	9
25.	PARIS LE BOURGET-FARNBOROUGH CIV	13	8
26.	MOSKVA/VNUKOVO-NICE	13	-1
27.	SANKT-PETERBURG-TALLINN/ULEMISTE	12	-4
28.	PARIS LE BOURGET-VNUKOVO	12	8
29.	KIEV - ZHULYANY-DNEPROPETROVSK	12	12
30	DNEPROPETROVSK-KIEV - ZHULYANY	12	12

WINGX is working on the following analysis, which we will shortly make available to our subscribers

Upcoming Analysis

WINGX
ADVANCE

DE-ICING	› *Analysis of the de-icing market: how many events forecast for winter 2013, what this represents in operating costs, where and how are these costs being incurred.*
CHARTER REVENUES	› *Size of the charter market: how much revenue is being generated, by region, by fleet segment, by aircraft type, by key routes, by time series.*
FUEL UPLOAD	› *Fuel upload: what are the requirements of the business aviation market, by region, aircraft type, OEM, route network. Quantification of market value.*
CARBON EMISSIONS	› *Carbon emissions: what is the business aviation market´s carbon footprint, how is it generated regionally and by fleet type, what is the implied impact of the ETS.*
US MARKET	› *US market status: using the same benchmarks applied to the European area market, how is the larger US business aviation market performing.*
EMERGING MARKETS	› *Emerging market growth: outside the mature US and European markets, where is the growth in business aviation and what are the key drivers.*

If these or other business aviation related market research studies are of interest to you, please let us know and we would be happy to assist

Definitions

- The charts illustrated in this analysis source data from national business aviation associations and Eurocontrol, covering 39 European national territories
- All data analysis is carried out by WINGX Advance through our proprietory data tracking methodology
- Illustrated flight activity analysis pertains to all IFR registered flights within Eurocontrol territories and between these 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 jet types except those based on aircraft models used by commercial airlines, including the Embraer Legacy, Lineage, ACJ and BBJ derivations
- Jet aircraft activity is segmented by cabin/range capability including: Ultra Long Range, Super Mid Size, Mid Size, Super Light, Light, Entry Level, Very Light
- Where indicated, the analysis also covers turbo prop and piston aircraft; utilisation of all aircraft is also categorised by each of the OEMs for these aircraft
- The analysis, as indicated, covers all types of private and commercial movement
- Aircraft utilisation is defined as traffic and is measured by number of departures and number of flight hours
- 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)