WINGX ADVANCE

February 2013

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BUSINESS AVIATION MONITOR

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ebaa

cepa central europe private aviation

Source: Fotolia

European Business Aviation departures growth in February

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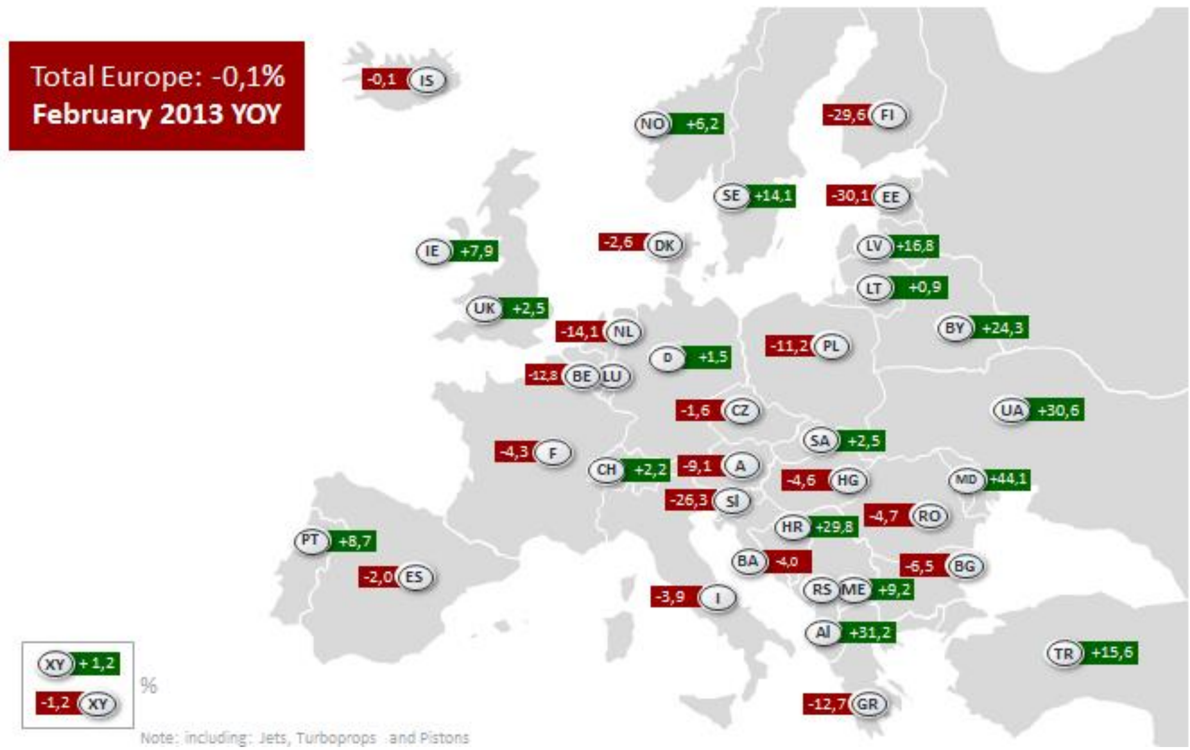
Bright spots in Ireland and the UK, Norway and Sweden and almost all Central and East European countries, notably Ukraine, Belarus and Turkey.



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GET MORE:

- The summary analysis behind the map
- Total hours flown and last 12 months
- The 2013 month by month tracker of activity
- This month compared to same month last 5 years
- Where the industry is in the economic cycle
- How the country market activity profile compare

Where are we in the cycle?

Sequential month activity is up (despite just 28 days). With the seasonal effect taken out, February is sequentially slightly lower than January. No overall recovery yet.

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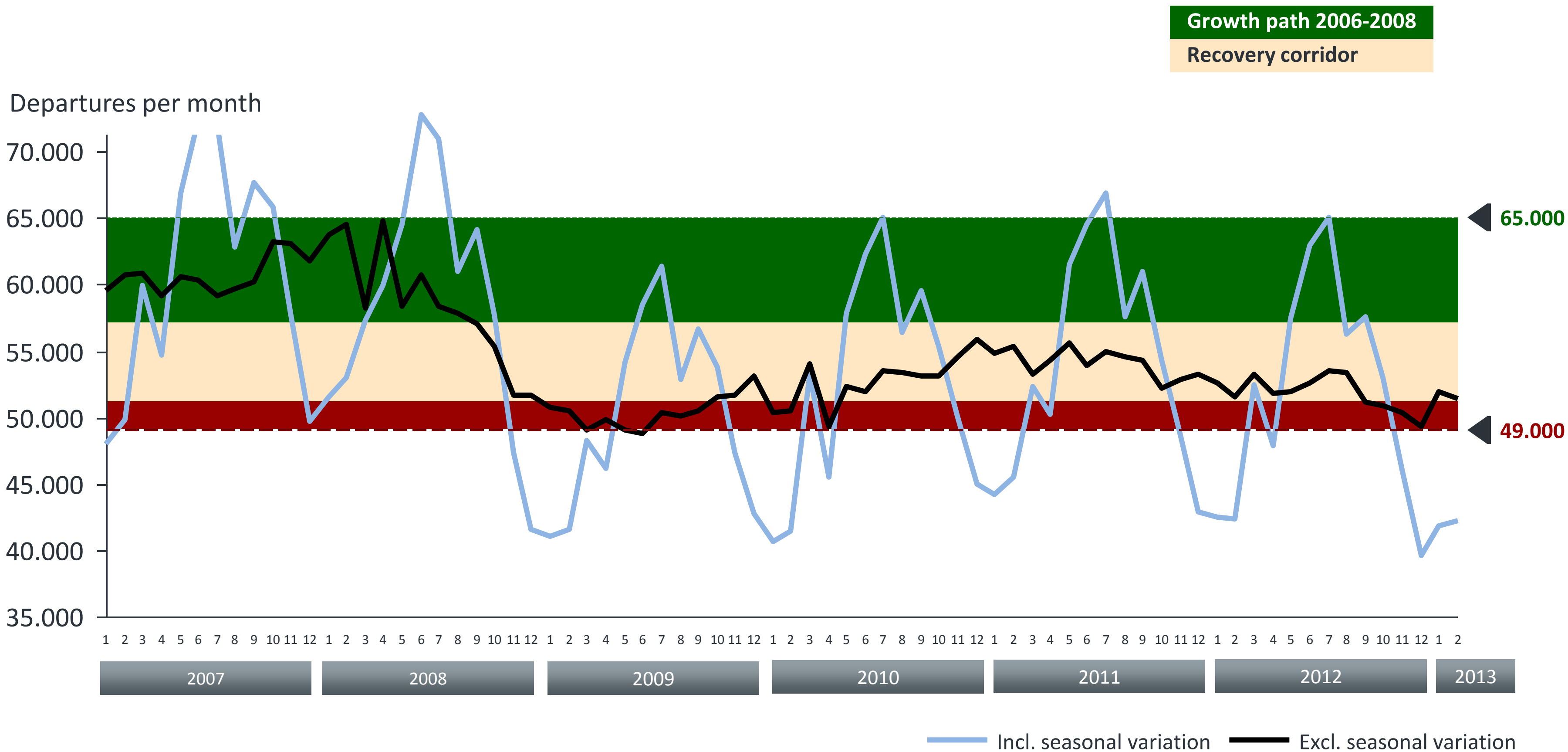

Note: including: Jets, Turboprops and Pistons

February region flow of departures from top countries

Major negative effects from France, Italy, Spain, UK domestic, and France-Switzerland flights. Upsides from Germany, Turkey, CH domestic, UK-CH and Germany-France.

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including: Jets, Turboprops and Pistons

Destination country / Origin country

Origin country	FR	GER	UK	IT	CH	ESP	NRY	TUR	AUS	RUS	SWE	UKR	BEL	NET	POL	GRE
France	-11,31%	16,72%	-1,32%	-12,46%	-3,27%	4,90%		9,68%	-15,05%	4,94%		-11,54%	2,92%	3,13%		
Departures	3.820	363	675	281	769	214		34	79	255		46	176	66		
Germany	24,53%	3,17%	4,95%	-0,48%	-12,58%	-6,52%		44,44%	-5,48%	8,03%	31,51%	-11,43%	-14,11%	-18,25%	15,49%	
Departures	401	3.451	339	207	424	129		52	293	148	96	31	140	112	82	
UK	1,13%	19,53%	-8,66%	24,62%	2,55%	-5,06%	17,14%		5,56%	-10,38%			5,50%	10,66%		
Departures	627	404	2.678	162	522	150	41		76	95	38		115	135		
Italy	-2,89%	-8,22%	28,68%	-3,91%	-4,85%	-11,90%			-31,58%	0,00%			4,88%			
Departures	302	201	175	1.597	216	74			52	72			43			
Switzerland	-2,53%	-8,57%	0,36%	-2,69%	1,70%	6,19%		27,27%	2,16%	-10,04%		6,25%	-14,43%	-1,30%		
Departures	771	427	551	217	598	120		42	142	251		68	83	76	49	
Spain	2,27%	5,34%	-15,82%	-2,50%	16,95%	-6,73%							-20,00%			
Departures	225	138	133	78	138	831			37				36			
Norway							12,97%				0,00%					
Departures			43				1.638				39					
Turkey		13,33%	-6,06%		5,00%			26,93%								
Departures		51	31		42			985								
Austria	0,00%	-11,17%	23,08%	-20,78%	-7,79%	0,00%			0,00%	-0,89%						
Departures	97	310	80	61	142	35			229	111		50				
Russian Federation	-13,27%	-2,65%	-21,70%	15,38%	-7,29%				-16,54%			-1,96%				
Departures	196	147	83	75	229				111			100				
Sweden		40,28%	29,03%				0,00%				-0,44%					
Departures		101	40				36				911					
Ukraine	-2,04%	-17,78%			44,23%				25,64%	-11,11%		29,29%				
Departures	48	37			75				49	88		490				
Belgium/Luxembourg	-2,41%	-5,49%	1,87%	40,63%	-21,43%	-2,70%							-34,33%	4,65%		
Departures	162	155	109	45	88	36							88	45		
Netherlands	-9,33%	-30,00%	24,56%		11,69%								-6,25%	-45,88%		
Departures	68	112	142		86								45	210		
Poland		0,00%													-29,20%	
Departures		86			47										194	
Greece		-16,22%														-58,70%
Departures		31														57

GET MORE:

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- Traffic flows from W Europe, E Europe, Middle East and BRIC countries
- Arrivals from all ICAO global regions into Europe, YOY and YTD
- Principal O&Ds in Europe: relating to private flights; relating to charter flights

Traffic by flight filing (mission) February

Charter retains its historical share of 50-60% share of all European departures. Both charter and private flights fell year on year, but less than in January.

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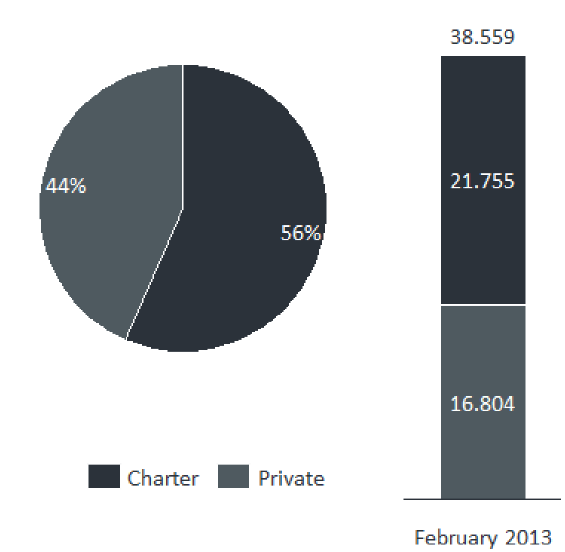
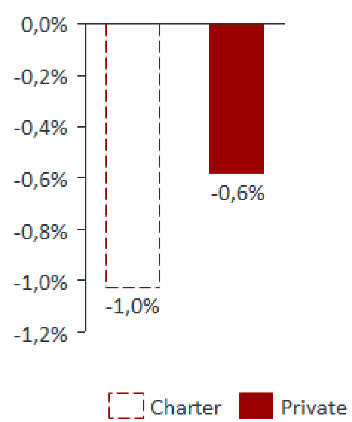
Distribution of departures



Note: including: Jets, Turboprops

YoY growth



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GET MORE:

- Last 12 months' review of charter & private flight activity and YOY growth
- Last 12 months' review of activity by short haul and long haul sector
- Average sector duration for each of last 12 month
- Distribution of aircraft capacity over last 12 months
- YOY sector length duration by aircraft segment

OEM departures by aircraft segment

Bombardier and Dassault ULR Jet usage was well up, same for Gulfstream in Heavy and Mid segments. HBC mid size and Cessna Super Light had largest declines in Light Jet segment.

	BOMBARDIER		Cessna		DASSAULT		EMBRAER		Gulfstream		Hawker Beechcraft		LEARJET	
	YtD	YoY	YtD	YoY	YtD	YoY	YtD	YoY	YtD	YoY	YtD	YoY	YtD	YoY
Ultra long range	17,3%	18,0%			14,7%	32,2%			2,8%	2,7%				
Departures	3.344	1.583			1.887	1.017			3.245	1.557				
Heavy jet	4,9%	8,9%			-2,4%	-1,0%			10,8%	15,6%				
Departures	3.864	1.887			7.232	3.543			2.644	1.258				
Super midsize jet	0,0%	3,9%	-2,5%	-1,5%	-1,1%	-4,8%			5,9%	7,0%	30,8%	57,3%		
Departures	1.907	927	1.974	964	1.072	512			918	463	135	79		
Midsize jet			0,0%	10,3%	-33,0%	-29,9%			19,3%	29,7%	-0,5%	-2,7%	-11,6%	-10,2%
Departures			640	345	350	191			526	258	5.222	2.581	1.877	924
Super light jet			-3,9%	-5,9%	-11,4%	-16,9%							-1,3%	0,7%
Departures			7.144	3.557	532	251							1.643	852
Light jet			-5,0%	-6,4%			80,4%	77,6%			-7,6%	-8,6%	-1,1%	-1,0%
Departures			10.314	5.224			596	283			2.468	1.246	1.654	779
Entry level jet			-1,5%	-1,9%										
Departures			4.008	1.982										
Very light jet			1,2%	8,6%			-25,2%	-33,9%						
Departures			3.104	1.692			612	300						

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GET MORE:

- YOY and YTD departures and hours flown, for each major Airframe, (jets, props). Engine and Avionics supplier will be added in early Q2-2013
- This month’s market shares of activity for each above Supplier, departures & hours
- Activity performance for each Supplier in terms of charter and private flights

Number of departures by aircraft segment and trip category

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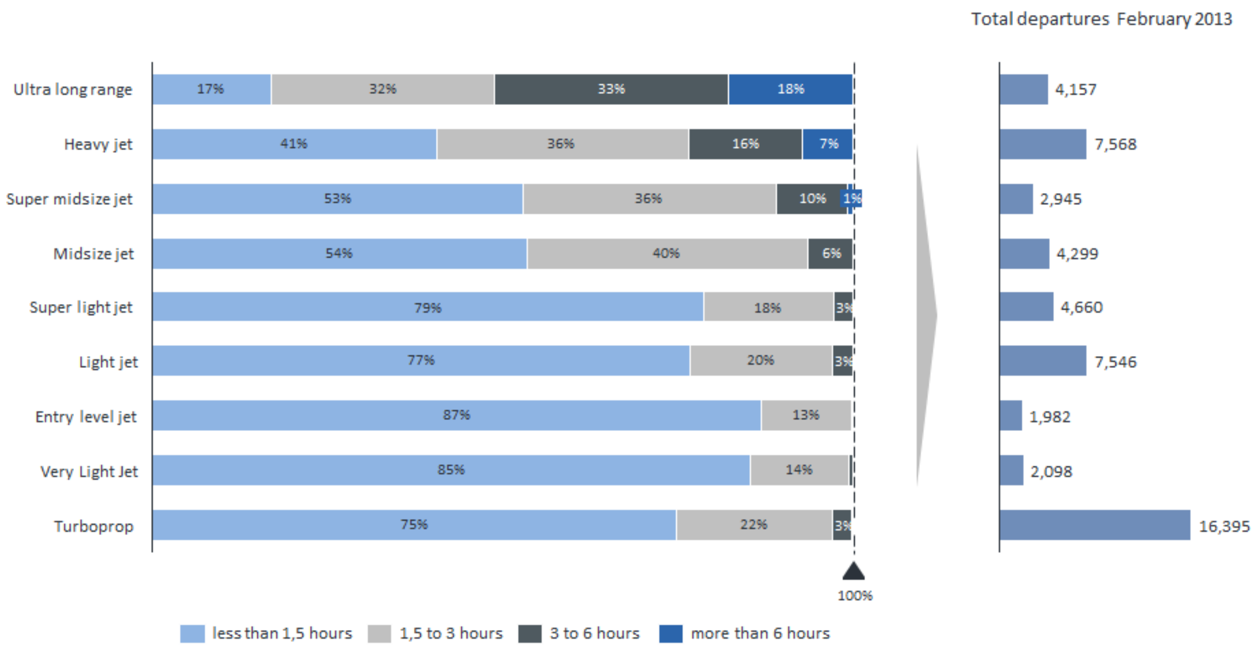
From February flight profiles, Super Mid and Mid, Light and Super Light, and Entry and VLJ are very similar. Turboprops flew more 1.5-3h sectors than any other segment.



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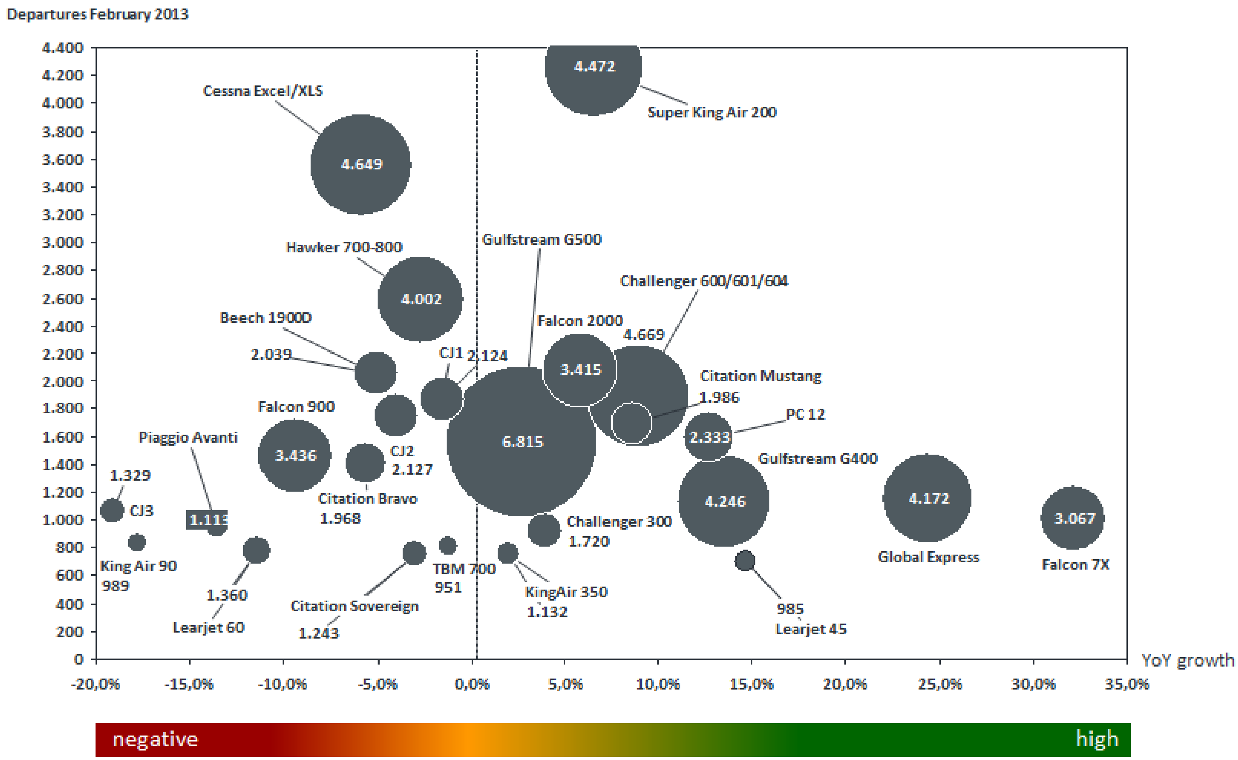
GET MORE:

- Aircraft segment market share of activity by departures and hours, and YOY growth
- Activity in departures and hours, and YOY growth, for each of last 12 months.
- Breakdown of charter and private flights for each aircraft segment this month, and YOY in both categories

Top 25 Aircraft activity

Fast growing Falcon 7X and Global Express usage, plus King Air 200, Challenger 600 and Gulfstream 400/500 flights, weighed against fewer flights on Cessna XLS, Falcon 900 and Hawker 750 aircraft.



GET MORE:

- Zoom in on best and worst performing aircraft types in terms of YOY departures and hours in this month
- Number of departures, market share and YOY growth for top 25 aircraft for charter flights only
- Number of departures, market share and YOY growth for top 25 aircraft for private flights only

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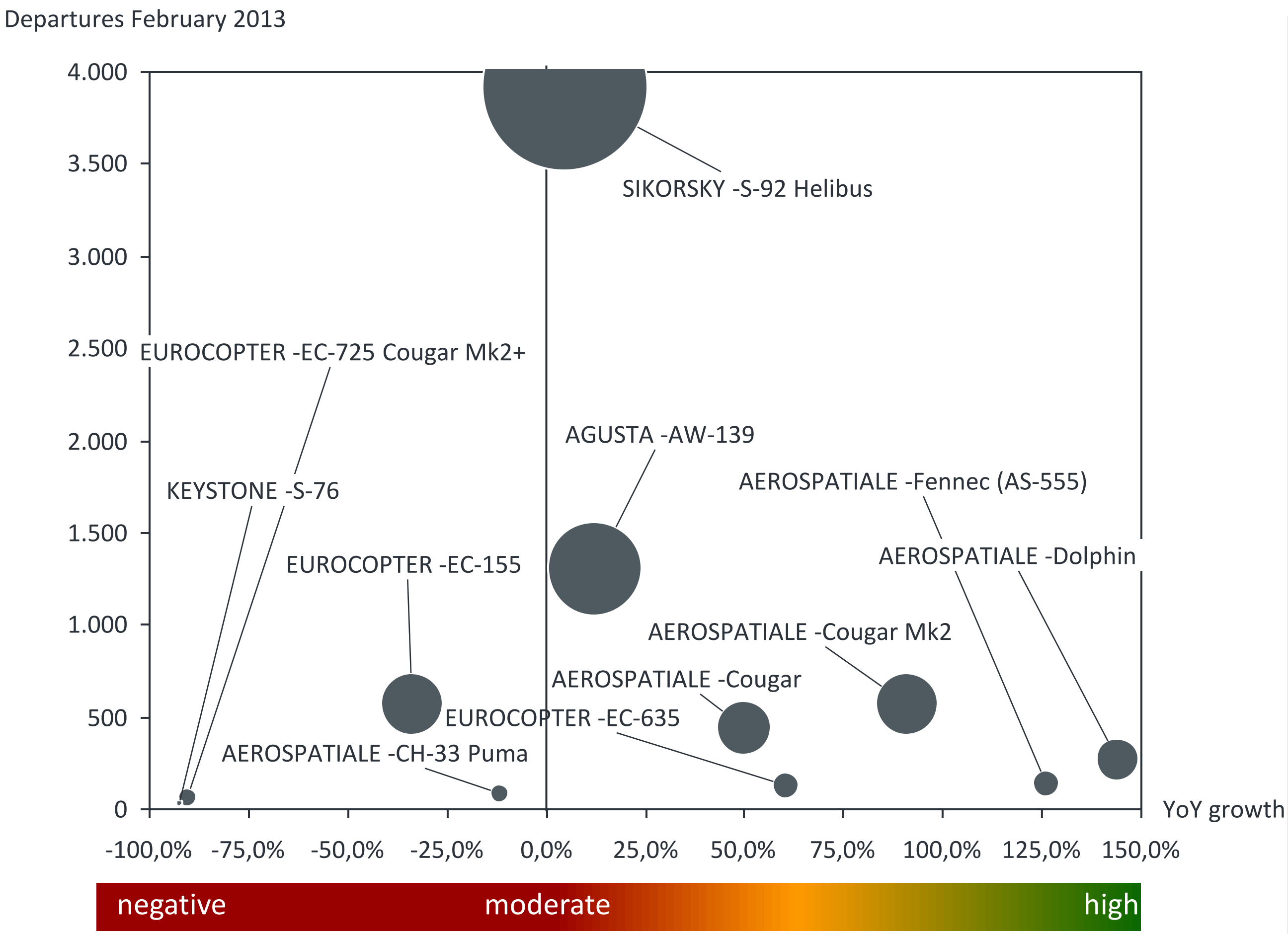
Top 10 off-shore Heli departures by type

Sikorsky and Agusta operated the majority of departures and grew steadily YOY. The Cougar Mk2 achieved significant growth whereas the Eurocopter EC 155 lost ground.



MORE to come in Q2-2013

GET MORE:

By time series and region:

- Analysis of departures by airport
- Analysis of fuel uplift (volume and cost)
- Analysis of mission type (charter, private, special)
- Analysis of O&D trends
- Tracking of engine and avionics flight time

Top 20 Airport departures

Kiev-Zhulyany and Northolt had very large (one off?) YOY growth in February. Schoenefeld appears to be taking share from Tegel. Muenchen was the biggest month loser.

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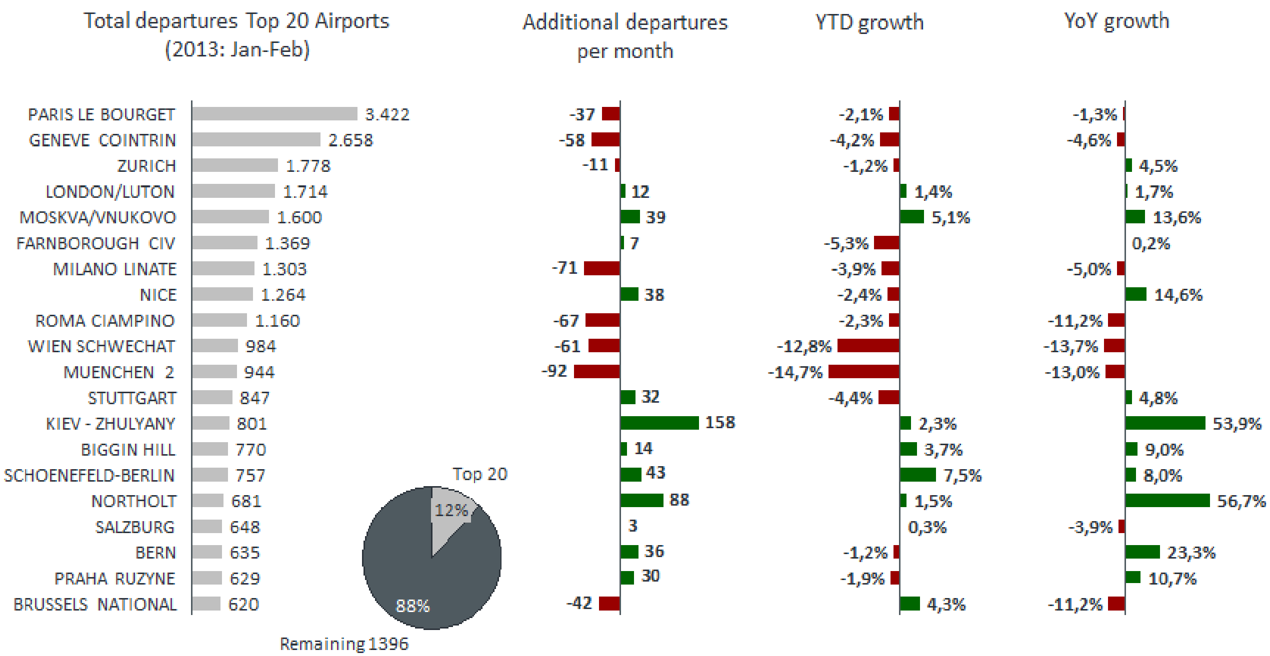

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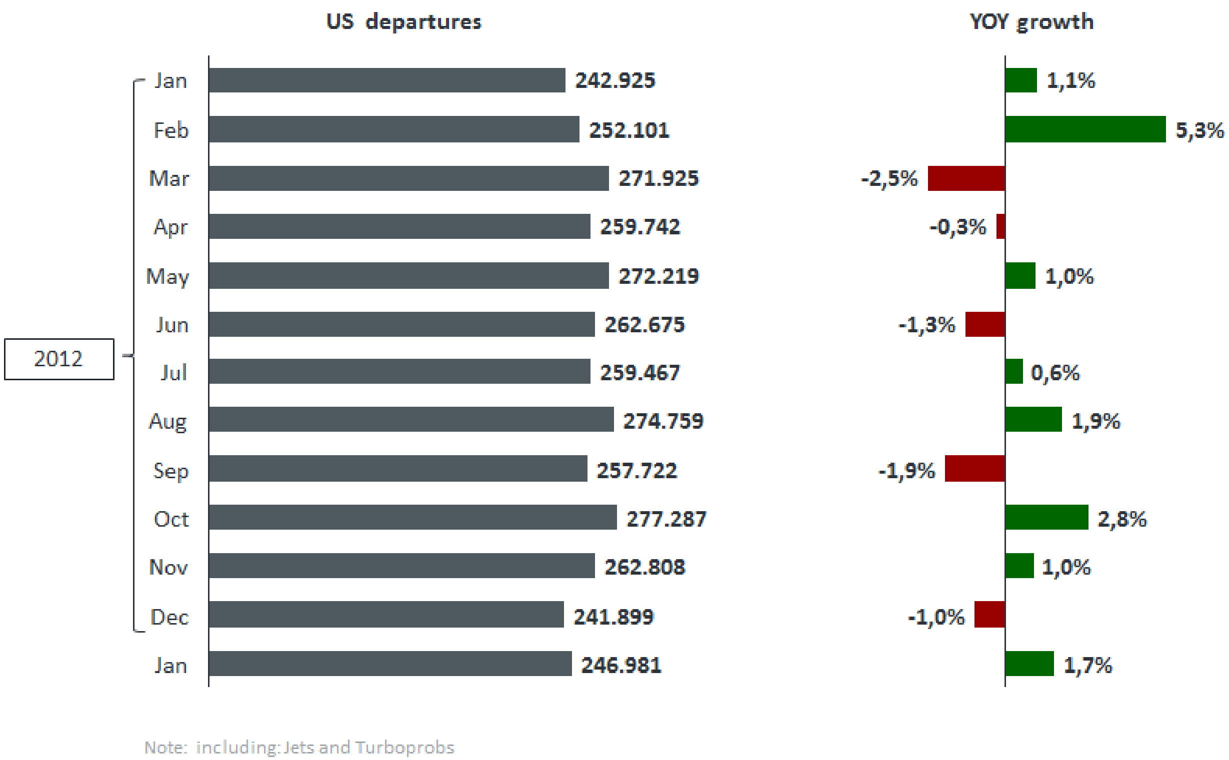
GET MORE:

- This month's departures and YOY growth at each of top 20 airports split by charter and private flights
- Zoom in on airports with fastest YOY growth and fastest YOY declines

Business aviation activity in the United States

Number of departures grew in January, year on year, putting European negative growth of 1.4% in the shade.



GET MORE:

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- This month's departures, market share, and YOY growth for each aircraft segment
- This month's departures, market share, and YOY growth for each Airframe OEM
- Comparative performance of North American and European aircraft activity by OEM and segment

Note: including: Jets only

Fuel consumption and carbon emission in January 2013

In January 2013, European business aviation emissions are 2% the size of those generated by European scheduled airline operations.

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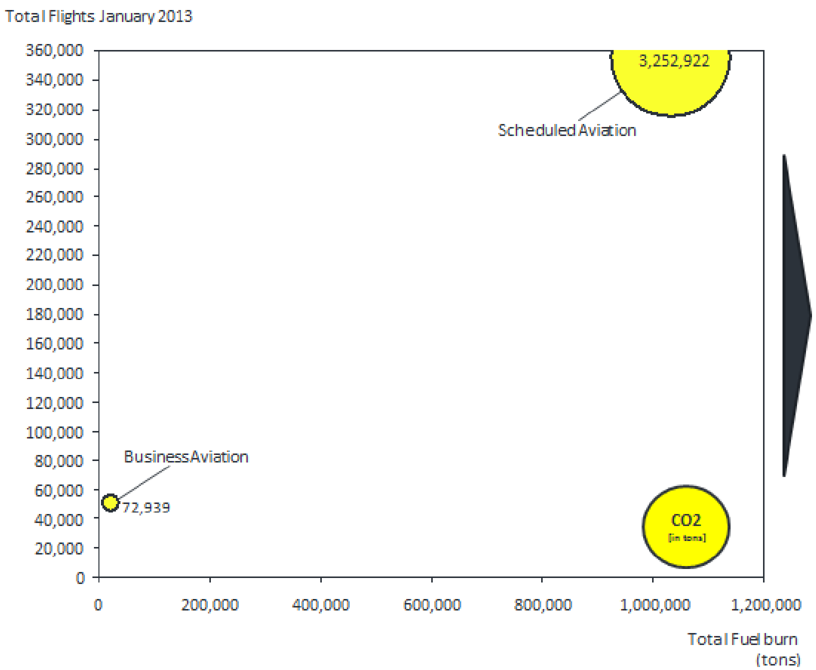

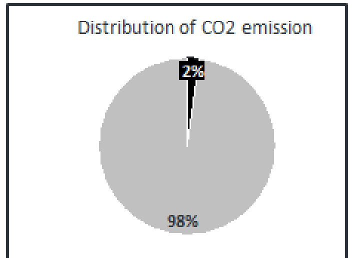

	Scheduled [in tons]	BizAv [in tons]
CO_2	3.252.922	72.939
JET A-1	1.032.674	23.155

MORE to come in Q2-2013

GET MORE:

By time series and region:

- Analysis of share of CO2 emissions by business aviation aircraft segment
- Indication of total fuel consumption and CO2 emissions by aircraft segment
- Highlighting of total flights, fuel consumption and CO2 emissions by aircraft type
- Breakdown of fuel consumption and emissions by flight filing (charter, private, special)

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WINGX Business Aviation Insight

- We provide detailed analysis of each of the fundamental KPIs summarised in this Monitor in our monthly Insight. The Insight is EUR 75/month for a minimum quarterly subscription, or EUR 810 for a one year subscription. Let us know if you would like to evaluate a trial Insight.

WINGX Customised Market Intelligence

- 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 suppy potential, FBO passenger throughput, landing fee analysis, or aircraft type performance analysis.

WINGX Market Studies and Forecasts

- We have tracked and recorded several years´worth of data relating to global business aviation fleets and activity. This enables us to move quickly towards qualifying and quantifying market opportunities, trends and forecast market size.

WINGX Strategic Consulting

- The WINGX team assembles senior business professsionals 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.

WINGX Market Surveys

- 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 39 European national territories and the United States.
- 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 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 jet types except those based on aircraft models used by commercial airlines, including the Embraer Legacy, Bombardier CRJ2, Lineage, ACJ and BBJ derivations
- Jet aircraft activity is segmented by cabin/range capability: Ultra Long Range, Super Mid Size, Mid Size, Super Light, Light, Entry Level, Very Light. All European off-shore operating helicopter types are included.
- 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 (charter) departures. Total departures also cover special flights, which include government and training flights.
- Aircraft utilisation is measured by number of departures and related number of flight hours. Our analysis does not include Overflights.
- 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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