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July 2013

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BUSINESS AVIATION MONITOR

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Where are we in the industry cycle?

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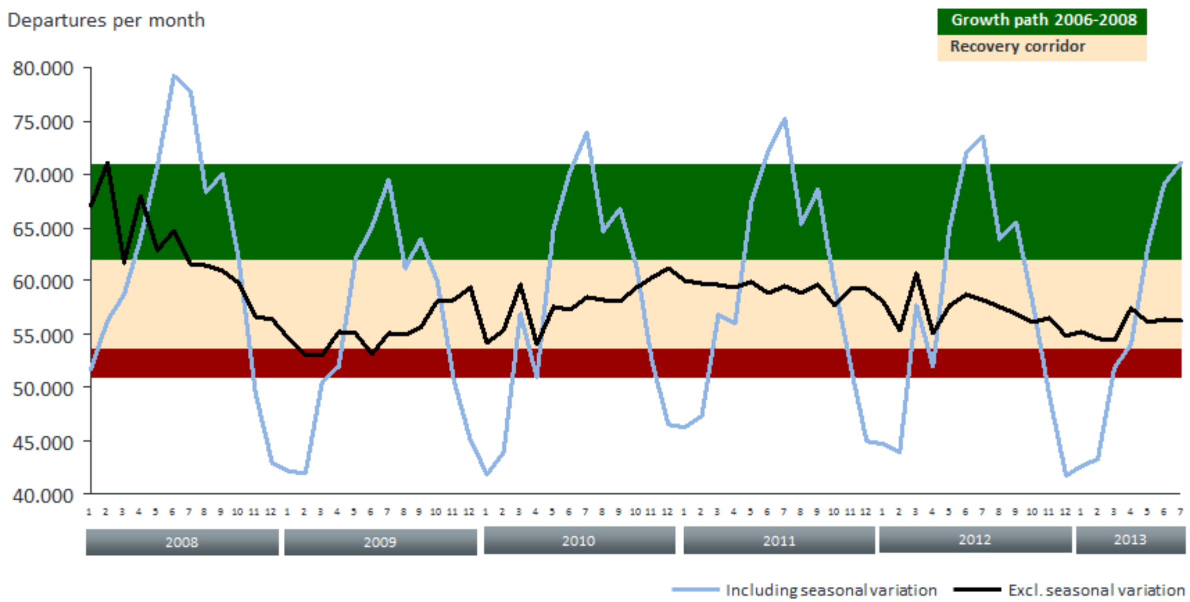
Sequential month activity is up, in line with the summer season. But it´s clear that mid year 2013 compares unfavorably with mid year 2012; no recovery in sight.

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 July

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Growth in one third of all surveyed countries, but declines in the largest markets, especially in Central, Southern and Eastern Europe. Overall 3.3% decline was slight improvement on June.

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
- Distribution of Charter, Private and Other flights

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Principal regional flows, July 2013 and YOY change

50% of top 10 markets saw domestic activity increase in July. France-Spain, Russia, and UK to Spain, Switzerland-Germany, all up, and France-UK, Switzerland, and UK-Italy well down.

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	France	Germany	UK	Italy	Spain	Switzerland	Turkey	Austria	Russia	Ukraine
France	0.8%	-1.7%	-7.3%	-0.7%	14.4%	-4.2%	10.1%	-11.5%	8.8%	5.4%
Departures	6221	649	1356	1185	690	1158	76	161	384	98
Germany	2.3%	3.0%	-2.8%	-5.0%	3.9%	1.3%	-26.9%	0.7%	-10.7%	-13.2%
Departures	680	3987	423	400	292	481	98	431	142	46
UK	-1.4%	-2.9%	-12.7%	-7.8%	5.0%	6.1%	-15.1%	56.4%	-24.6%	-20.9%
Departures	1392	432	3563	439	443	384	45	86	95	34
Italy	-2.6%	-1.2%	0.0%	-10.0%	8.4%	1.1%	12.5%	-7.5%	3.8%	-19.1%
Departures	1130	419	454	2660	310	471	81	172	302	72
Spain	6.2%	0.7%	0.5%	17.7%	1.6%	9.6%	-30.8%	20.3%	7.2%	4.8%
Departures	651	285	429	333	1434	206	18	71	89	22
Switzerland	-3.1%	10.1%	0.0%	-12.7%	18.5%	-8.2%	4.9%	-13.7%	23.8%	-6.9%
Departures	1123	503	370	447	211	507	43	132	104	27
Turkey	1.5%	-26.8%	-19.3%	-15.7%	-12.0%	-2.6%	4.2%	23.1%	-21.8%	-8.8%
Departures	69	101	46	70	22	38	1144	16	247	52
Austria	-7.9%	-4.3%	62.3%	-11.2%	1.8%	-4.2%	-35.0%	-5.2%	25.5%	-25.6%
Departures	186	422	86	174	56	138	13	601	69	29
Russia	0.5%	-7.9%	-21.2%	-4.0%	10.2%	28.7%	-17.4%	10.7%	71.4%	-0.8%
Departures	416	129	89	289	97	112	247	62	12	248
Ukraine	-14.2%	2.0%	-26.2%	10.5%	0.0%	-3.2%	-14.0%	-17.0%	-14.5%	-4.1%
Departures	91	51	31	95	23	30	43	39	236	1036

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 type), July 2013

Charter activity increased its overall share from June, but fell substantially YOY. Government flights increased, although this share of total is insignificant.

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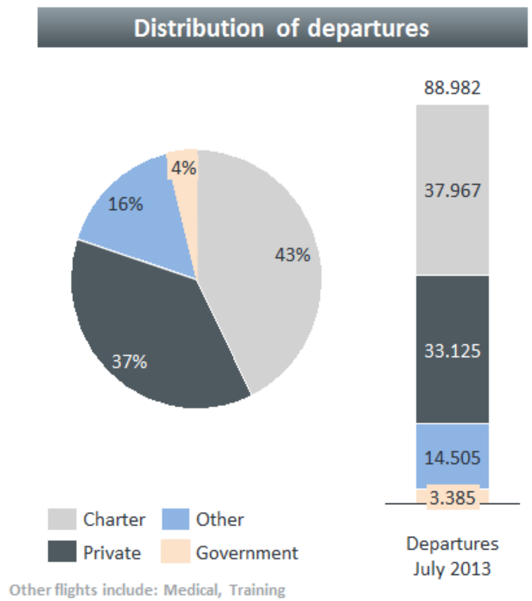

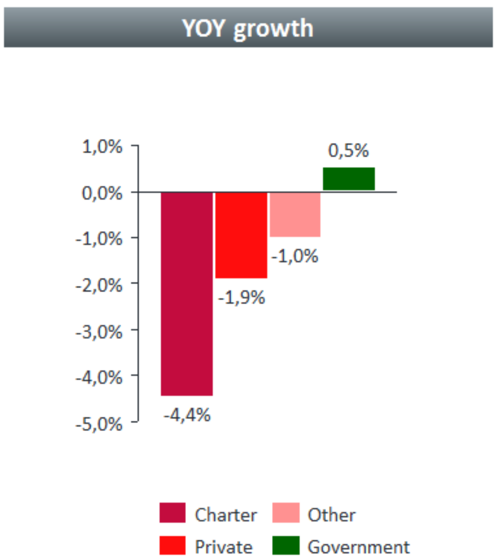

THE INSIDE STORY

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

With a third of all departures, Cessna´s (negative) performance mirrors the overall market. Only Bombardier posted significant gains in July, with also Pilatus and Gulfstream up YTD.

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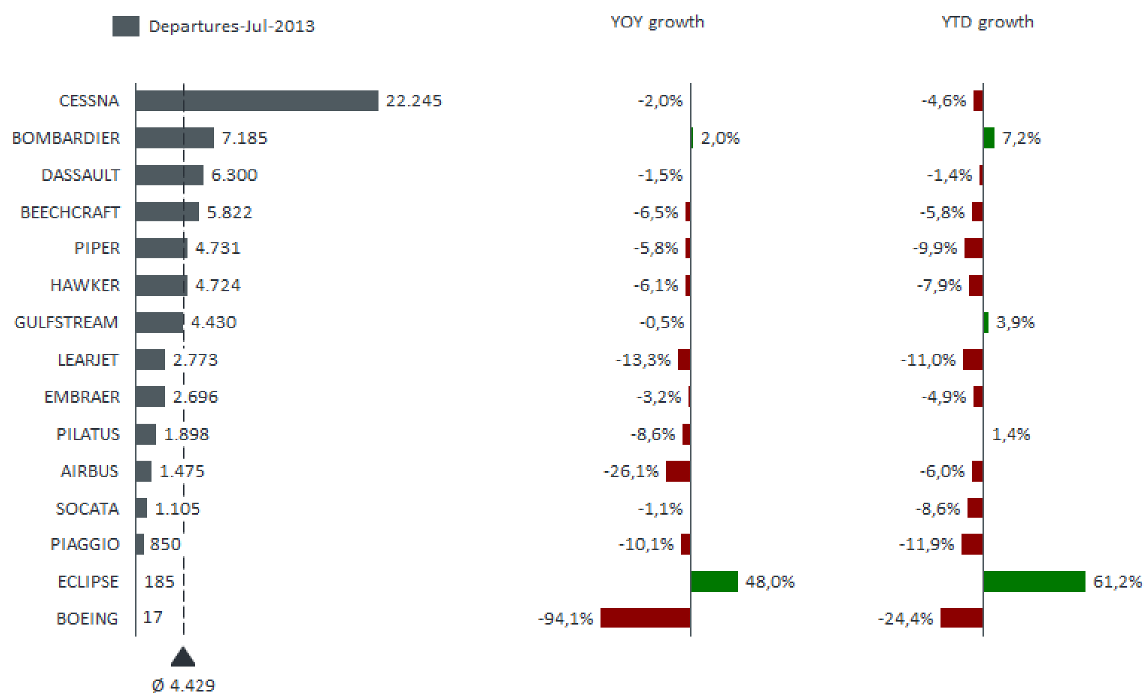
THE BIG PICTURE



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THE INSIDE STORY

For OEM providers

- YOY activity growth in each size segment, for each leading Jet, Turboprop and Piston Airframe OEM.
- 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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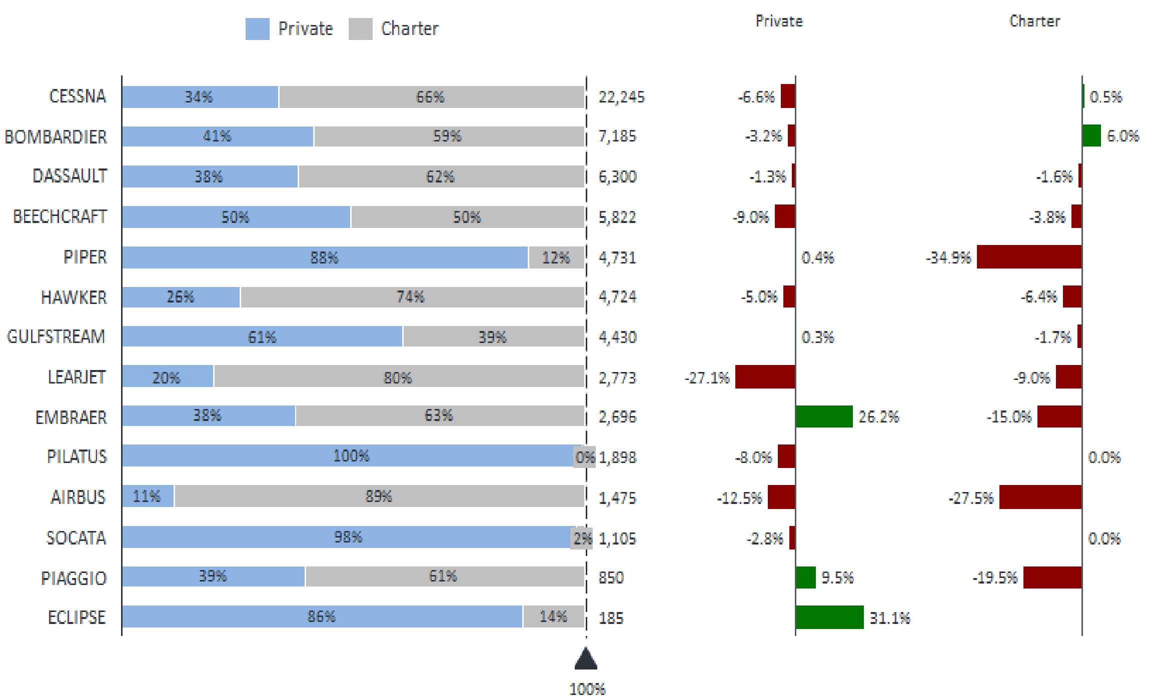
Bombardier´s aggregate gains in July were boosted by charter, where Cessna also stabilised, and in private flights, Embraer and Piaggio somewhat offset declining demand for charter.

THE BIG PICTURE

Departures July 2013



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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, by flight departures YTD

The Global Express and Challenger 300 drove gains in ULR and SM jet activity, the Mustang was the VLJ growth driver, notably King Air and GV dropped into negative territory in July YOY.

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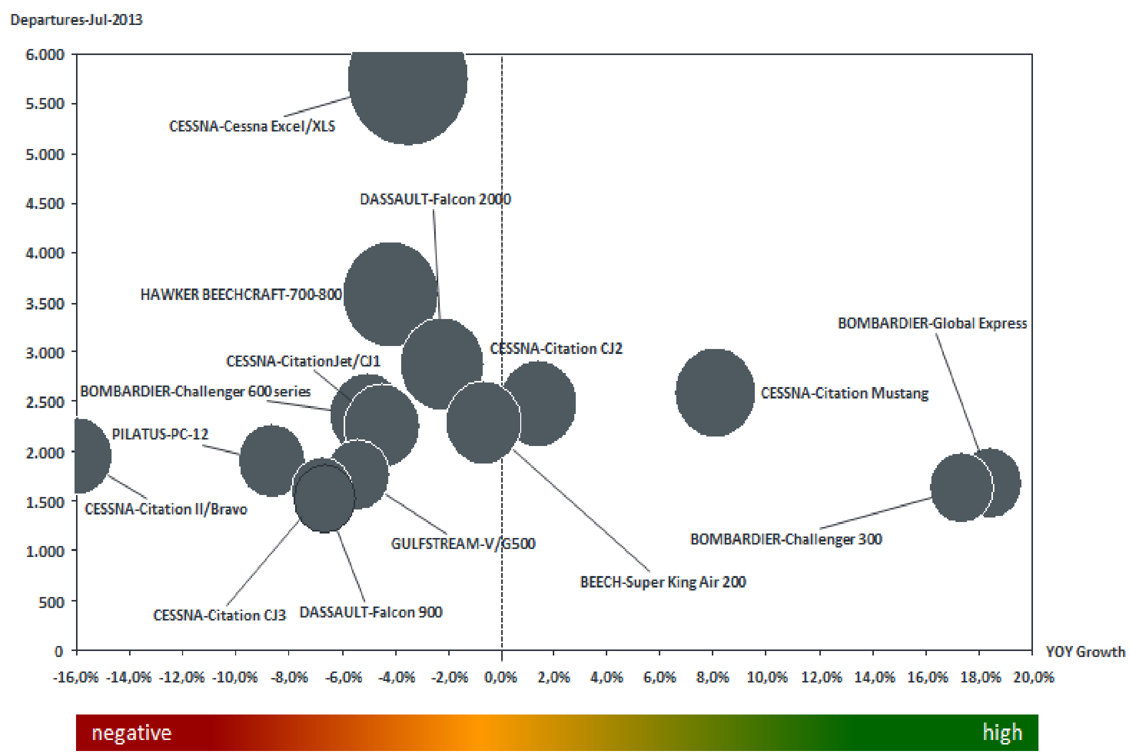
THE BIG PICTURE



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THE INSIDE STORY

For Aircraft Types (Jets, Turboprops, Pistons):

- Focus on total departures, activity growth and market share in Charter flights
- Focus on total departures, activity growth and market share in Private flights
- Across whole fleet, zoom in on fastest and most significant winners and losers

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Top 20 Airport departures

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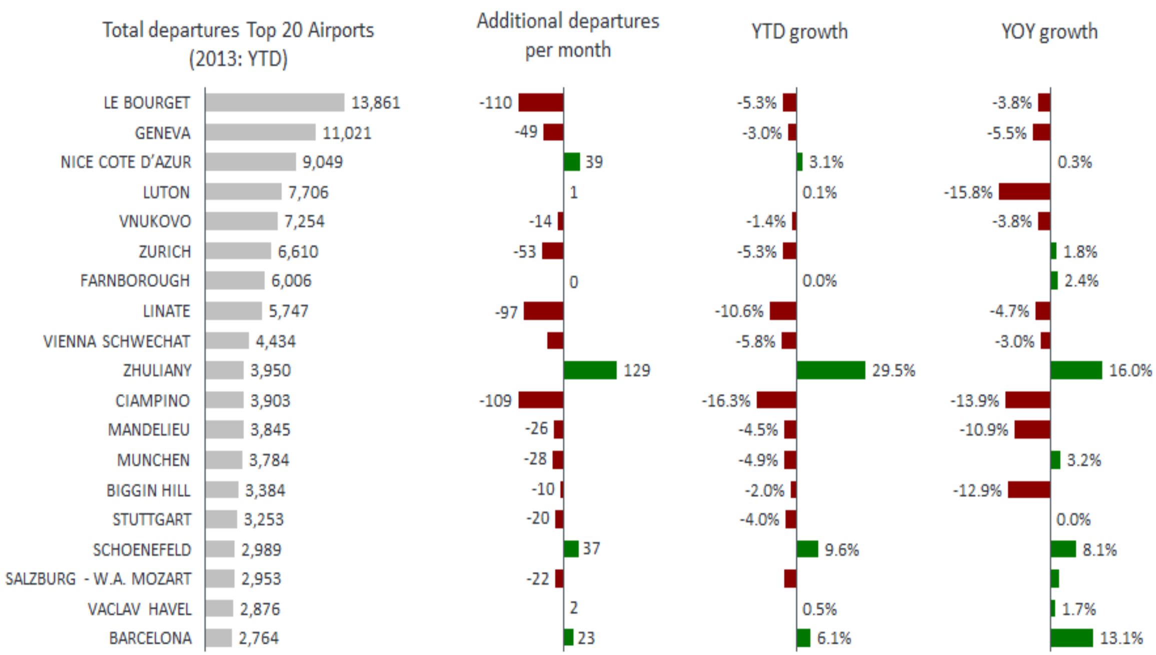
Despite Ukraine´s aggregate activity slump, activity up at UKKK, with summer season also boosting flights at LFMN. LFPB, LSGG on downward trend, EGLF steady YTD, LEBZ, EDDB well up.

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

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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 and the United States.
- 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 and FAA 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 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 by OEM.
- 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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