WINGX
ADVANCE

June 2013
June 2013

# BUSINESS AVIATION
# MONITOR

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central europe private aviation

Source: Fotolia

# Where are we in the industry cycle?

Sequential month activity is well up, normal for the summer season. Activity is lower than June 2012 but even discounting seasonal variation, activity is trending up YTD.

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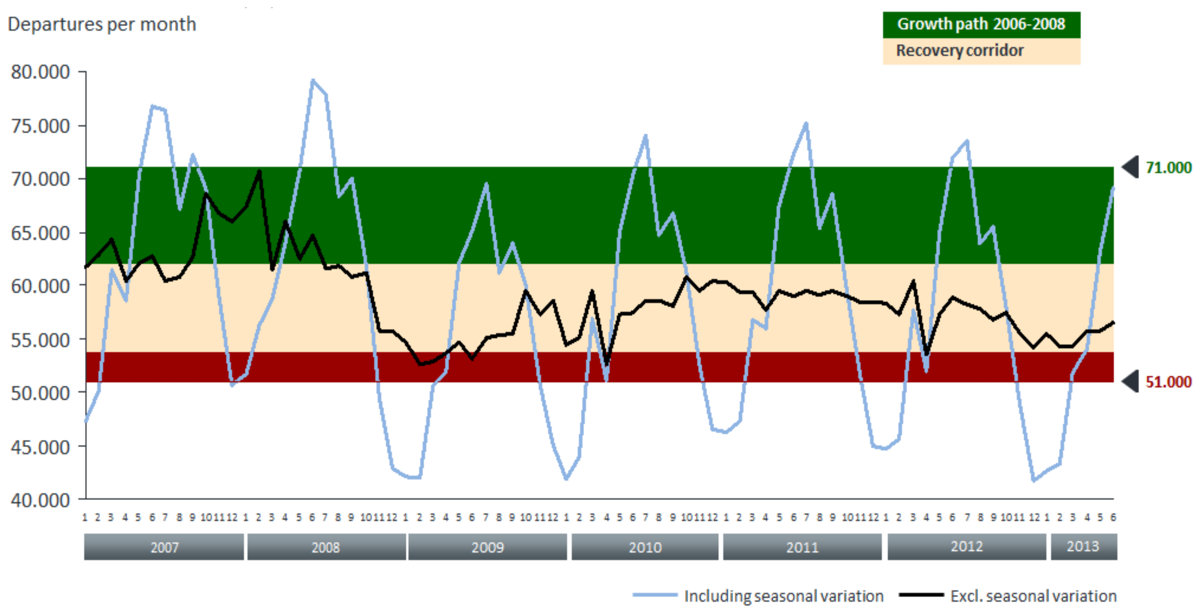
## THE BIG PICTURE




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
- Pistons Vs Jets Vs Turboprops

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# European Business Aviation departure growth in June

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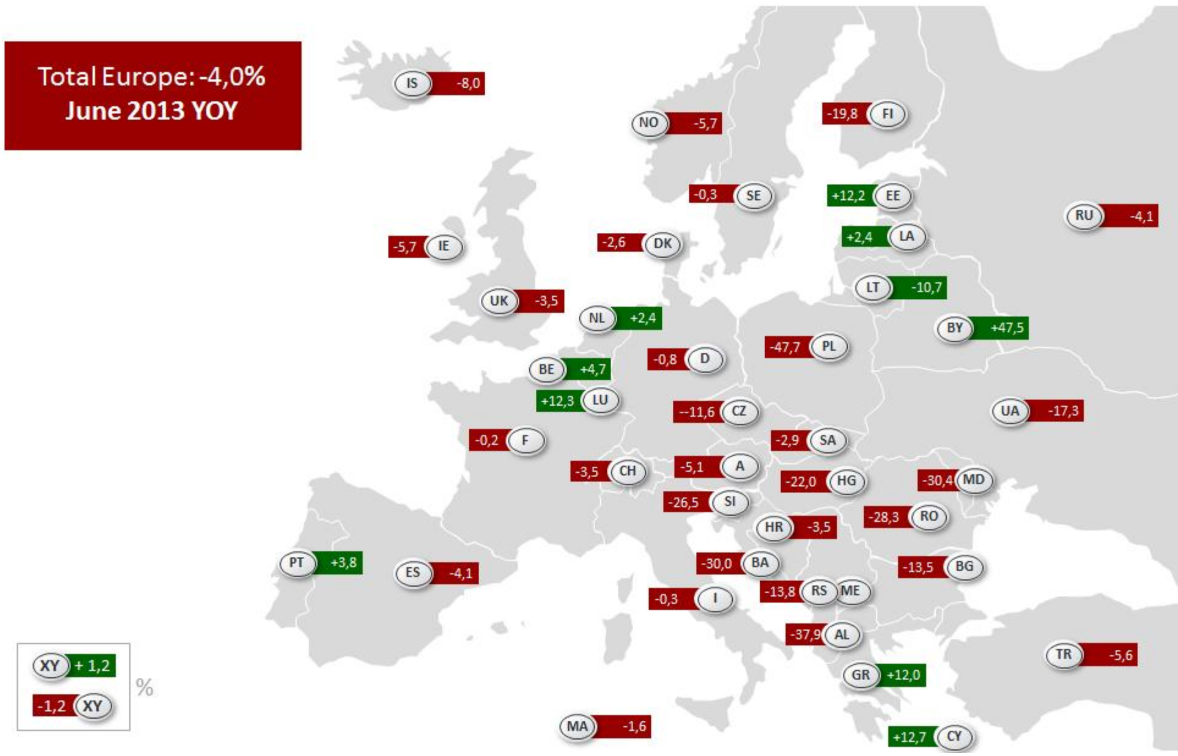
There were YOY few growth spots this month; all major markets subsided, Ukraine and Turkey also slowed. There was some YOY growth in Greece, the Low Countries, and Baltic states.

## 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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# Regional flow of departures between principal markets

Notable increase in German domestic trips were up. French connection mostly up. But the most significant declines were domestic France, France-UK and France-Switz connections.

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## THE BIG PICTURE

EG: UK-Germany **activity up 11%**

June Flight Departures

| | France | Germany | UK | Italy | Switzerland | Spain | Turkey | Austria | Russia | Ukraine | Sweden | Belgium | Greece | Netherlands | Poland | Norway |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| France | -1.0% | -3.3% | -1.1% | 2.1% | -10.0% | 0.8% | 8.1% | 14.6% | 9.4% | 11.6% | -10.9% | 6.6% | 32.3% | 17.4% | -8.8% | -20.0% |
| *Departures* | 5,752 | 707 | 1,343 | 809 | 1,075 | 495 | 67 | 196 | 326 | 77 | 49 | 323 | 86 | 155 | 62 | 12 |
| Germany | -9.8% | 2.0% | 3.2% | -1.0% | -2.2% | 9.1% | -5.4% | -1.1% | -12.2% | -31.5% | 1.6% | -13.0% | 15.5% | -2.3% | -22.9% | 6.5% |
| *Departures* | 670 | 4,593 | 451 | 384 | 524 | 288 | 106 | 458 | 173 | 63 | 130 | 141 | 82 | 167 | 158 | 49 |
| UK | -6.5% | 11.2% | -8.5% | -4.0% | 8.3% | -15.5% | 2.0% | 6.6% | 12.2% | -41.1% | 5.6% | -5.5% | -22.4% | 16.4% | -18.2% | 0.0% |
| *Departures* | 1,300 | 487 | 3,668 | 380 | 432 | 365 | 52 | 81 | 166 | 33 | 75 | 138 | 45 | 177 | 27 | 55 |
| Italy | 3.7% | 2.1% | -0.5% | -4.0% | -5.9% | 10.6% | -20.0% | 3.0% | 23.1% | 79.1% | -9.5% | 25.0% | 7.3% | -4.4% | -42.6% | 60.0% |
| *Departures* | 842 | 391 | 395 | 2,332 | 396 | 230 | 44 | 170 | 224 | 77 | 19 | 60 | 103 | 43 | 31 | 8 |
| Switzerland | -6.1% | -2.5% | 8.3% | -1.2% | -5.9% | -13.1% | -8.3% | -2.7% | -11.7% | -16.3% | -13.6% | -21.0% | 54.1% | 0.0% | -42.3% | 21.4% |
| *Departures* | 1113 | 509 | 429 | 412 | 573 | 179 | 33 | 145 | 106 | 41 | 19 | 64 | 57 | 51 | 30 | 17 |
| Spain | 4.6% | 12.5% | -9.5% | 4.1% | -12.2% | -8.6% | -7.1% | 2.3% | -13.6% | 13.3% | 60.0% | -2.6% | 12.5% | 18.6% | -70.6% | -50.0% |
| *Departures* | 500 | 279 | 382 | 229 | 180 | 1,113 | 13 | 45 | 70 | 17 | 16 | 38 | 27 | 51 | 5 | 6 |
| Turkey | 20.3% | -16.8% | -16.4% | -27.3% | 9.1% | -11.1% | 4.4% | -11.5% | -11.9% | 40.8% | 0.0% | 25.0% | 4.4% | 42.9% | -68.8% | -66.7% |
| *Departures* | 71 | 94 | 46 | 40 | 36 | 16 | 1,223 | 23 | 295 | 69 | 2 | 10 | 71 | 10 | 5 | 2 |
| Russia | 10.4% | -3.3% | 17.2% | 7.2% | 23.3% | -17.5% | -15.1% | 8.7% | -26.3% | -15.5% | 40.0% | 45.5% | -4.8% | -5.6% | -77.7% | -17.4% |
| *Departures* | 351 | 178 | 157 | 238 | 111 | 80 | 297 | 75 | 14 | 273 | 21 | 16 | 79 | 17 | 27 | 19 |
| Austria | 6.5% | -4.7% | 37.5% | -4.8% | 11.2% | 7.1% | -23.1% | 0.3% | -8.8% | -23.7% | 77.8% | 18.8% | 11.1% | -22.7% | -54.2% | -25.0% |
| *Departures* | 181 | 449 | 88 | 158 | 159 | 45 | 20 | 626 | 73 | 45 | 16 | 19 | 30 | 17 | 22 | 3 |
| Ukraine | 13.2% | -11.0% | -39.6% | 102.6% | -11.4% | 15.8% | 17.5% | -5.5% | 0.0% | -17.5% | -95.8% | -14.3% | 20.8% | -57.1% | -88.1% | -50.0% |
| *Departures* | 77 | 73 | 32 | 79 | 39 | 22 | 67 | 52 | 276 | 953 | 1 | 6 | 29 | 3 | 19 | 2 |
| Sweden | -16.0% | -5.0% | 7.6% | 18.8% | -24.0% | 50.0% | 200.0% | 41.7% | 31.3% | -96.0% | 0.2% | 33.3% | 50.0% | -50.0% | 100.0% | 8.8% |
| *Departures* | 42 | 133 | 71 | 19 | 19 | 15 | 3 | 17 | 21 | 1 | 1,145 | 16 | 3 | 9 | 26 | 99 |
| Belgium | 9.2% | -18.0% | -7.6% | -2.0% | 0.0% | 2.6% | 100.0% | 46.7% | 6.3% | -14.3% | -6.3% | 39.9% | 16.7% | -21.3% | -42.1% | -66.7% |
| *Departures* | 332 | 132 | 146 | 50 | 71 | 39 | 8 | 22 | 17 | 6 | 15 | 361 | 7 | 59 | 11 | 1 |
| Greece | 23.4% | 10.6% | -30.9% | 35.2% | 103.8% | -15.4% | 20.6% | 18.2% | -20.5% | 36.4% | 150.0% | -14.3% | 14.3% | 200.0% | 33.3% | -50.0% |
| *Departures* | 79 | 73 | 47 | 119 | 53 | 22 | 76 | 26 | 58 | 30 | 5 | 6 | 439 | 9 | 8 | 1 |
| Netherlands | 6.5% | 7.7% | 9.6% | 26.3% | 6.7% | 0.0% | -22.2% | -18.2% | 18.8% | -44.4% | -16.7% | -28.9% | 100.0% | 13.8% | -35.7% | 0.0% |
| *Departures* | 164 | 182 | 172 | 48 | 64 | 38 | 7 | 18 | 19 | 5 | 15 | 59 | 2 | 198 | 9 | 12 |
| Poland | 5.1% | -23.7% | -24.3% | -52.9% | -22.5% | -55.6% | -23.1% | -65.5% | -80.1% | -87.5% | 21.1% | -31.3% | 16.7% | -33.3% | -48.5% | -66.7% |
| *Departures* | 62 | 158 | 28 | 24 | 31 | 8 | 10 | 30 | 27 | 21 | 23 | 11 | 7 | 8 | 320 | 1 |
| Norway | -6.3% | -18.6% | -4.8% | -42.9% | 75.0% | -8.3% | -85.7% | 0.0% | -4.8% | 0.0% | 7.1% | 100.0% | -75.0% | 0.0% | 300.0% | -8.3% |
| *Departures* | 15 | 35 | 60 | 4 | 14 | 11 | 1 | 6 | 20 | 3 | 91 | 6 | 1 | 12 | 8 | 409 |

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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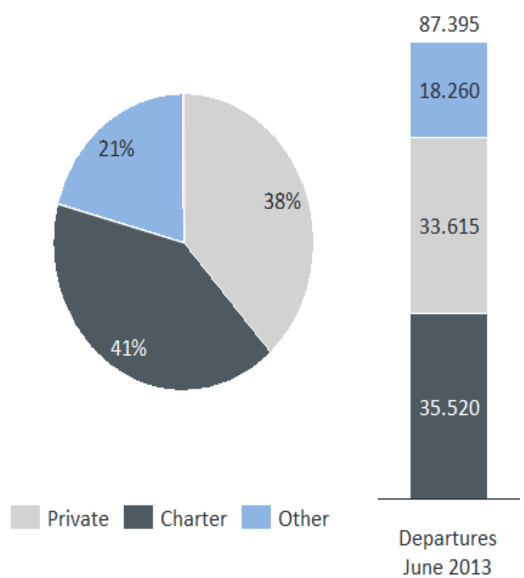
# Activity by flight filing (mission), June

There was a larger relative and absolute drop in charter flights than private or other flights in June YOY. Charter flights narrowly outsized private flights

## THE BIG PICTURE

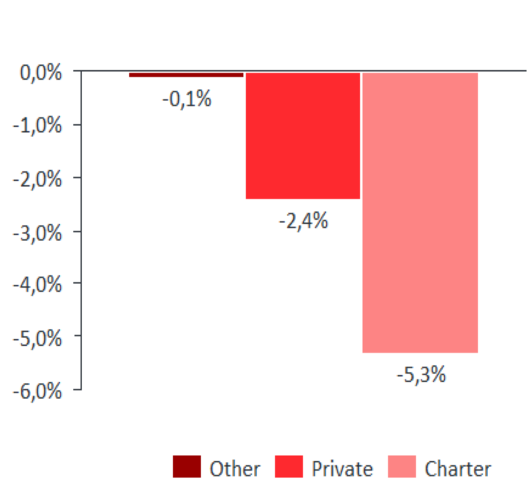
June Flight Departures

### 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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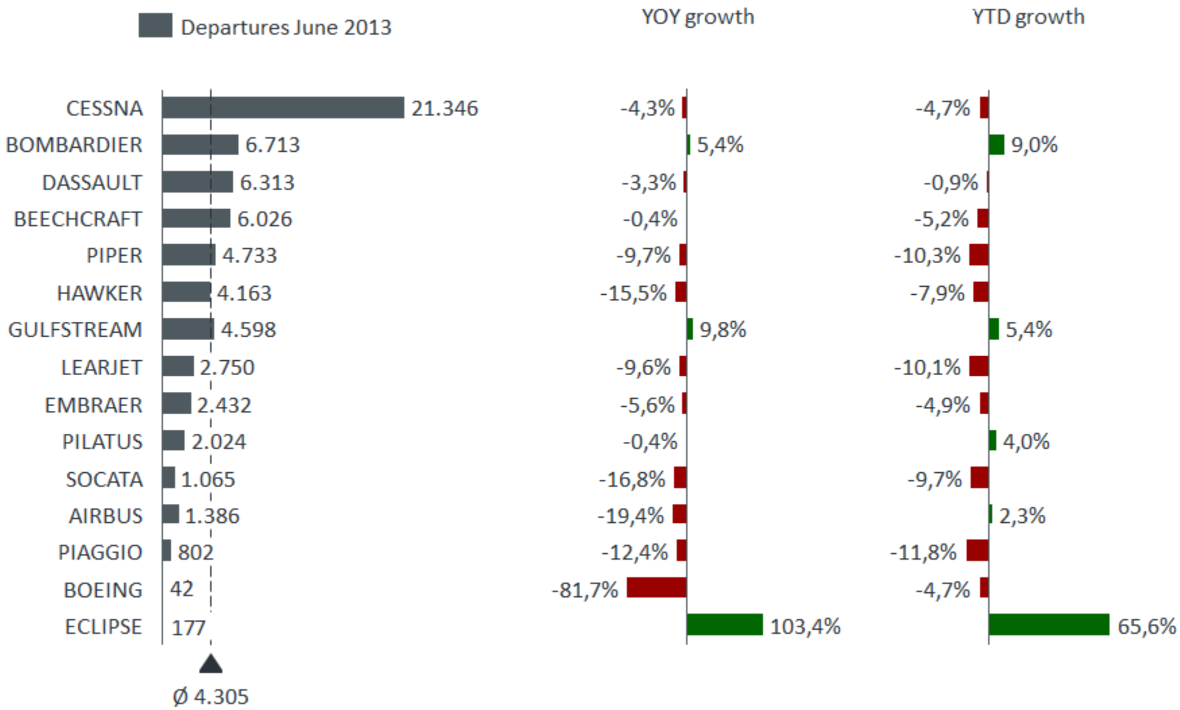
Bombardier and Gulfstream stood out as the only OEM fleets gaining significant activity in June. Pilatus and notably Airbus activity fell off YOY. Hawker aircraft had a poor month relative to 2012.

## THE BIG PICTURE




Note: Only Charter and Private flights are considered

## 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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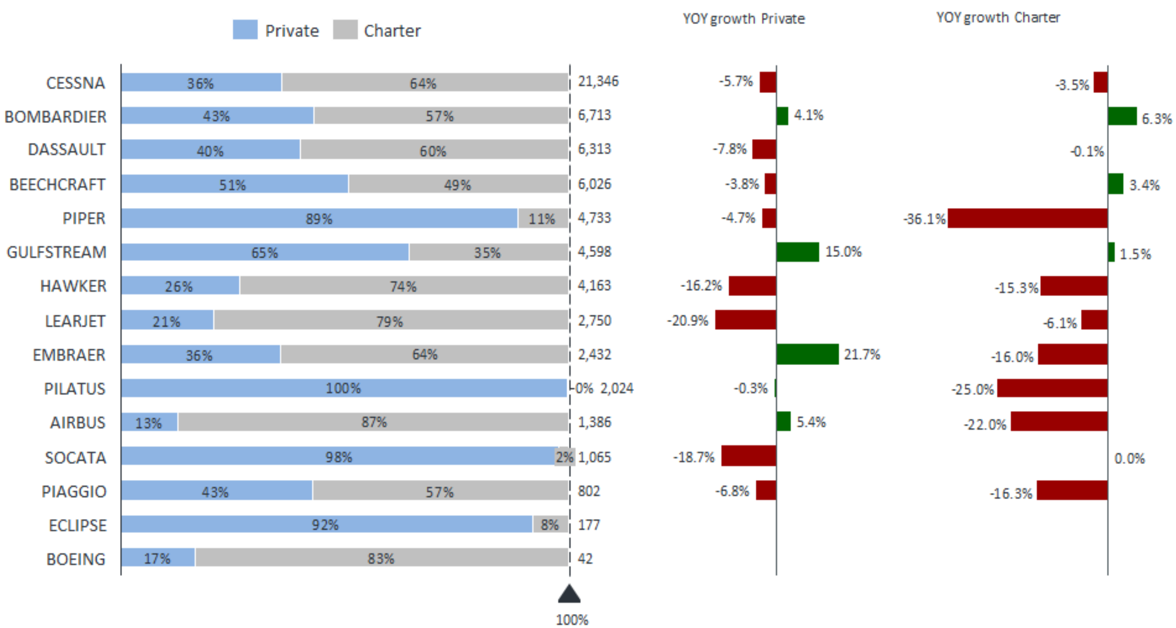
Gulfstream aircraft flights up, mostly in private, Bombardier mostly in charter. Beechcraft posted gains in charter, Embraer and Airbus in Private. Biggest decline: Hawker private flights.

## THE BIG PICTURE

Departures June 2013




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, by flight departures YTD

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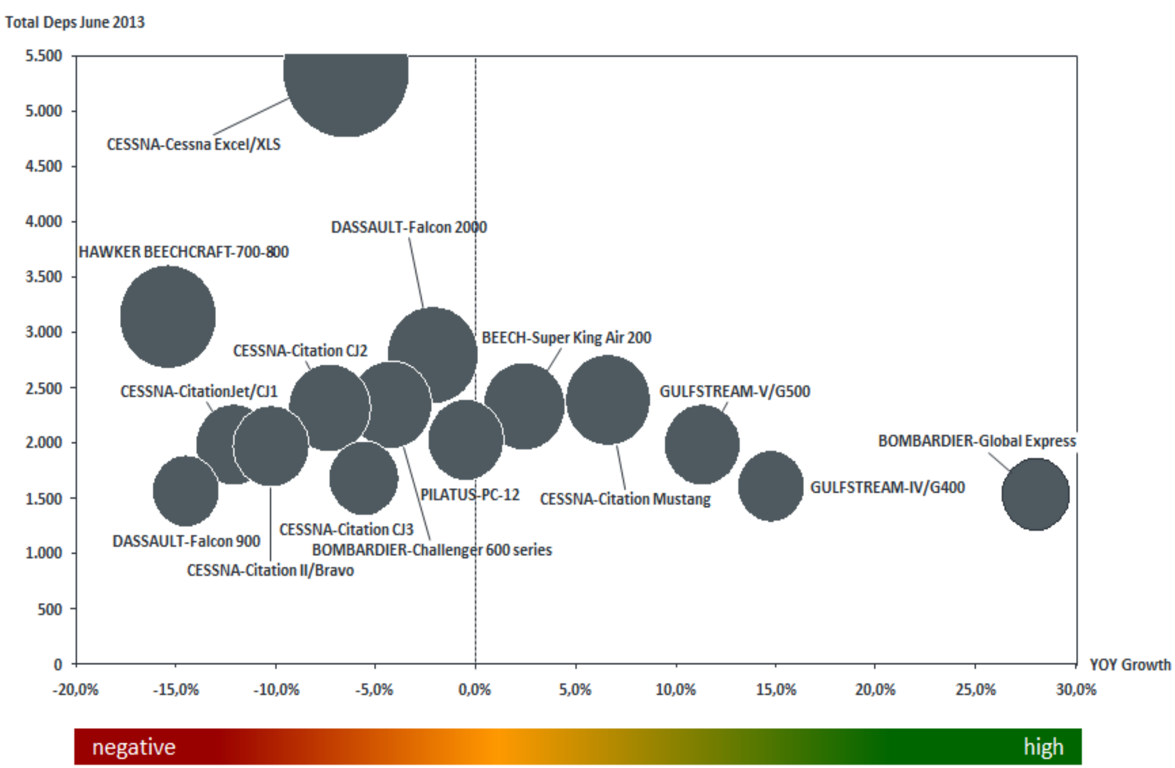
Three ULR jets, a VLJ and a turboprop were up YOY, otherwise demand fell for popular aircraft, with notably large declines in activity for the Falcon 900 and Hawker 700-800 series.

## THE BIG PICTURE




Note: Only Charter and Private flights are considered

## 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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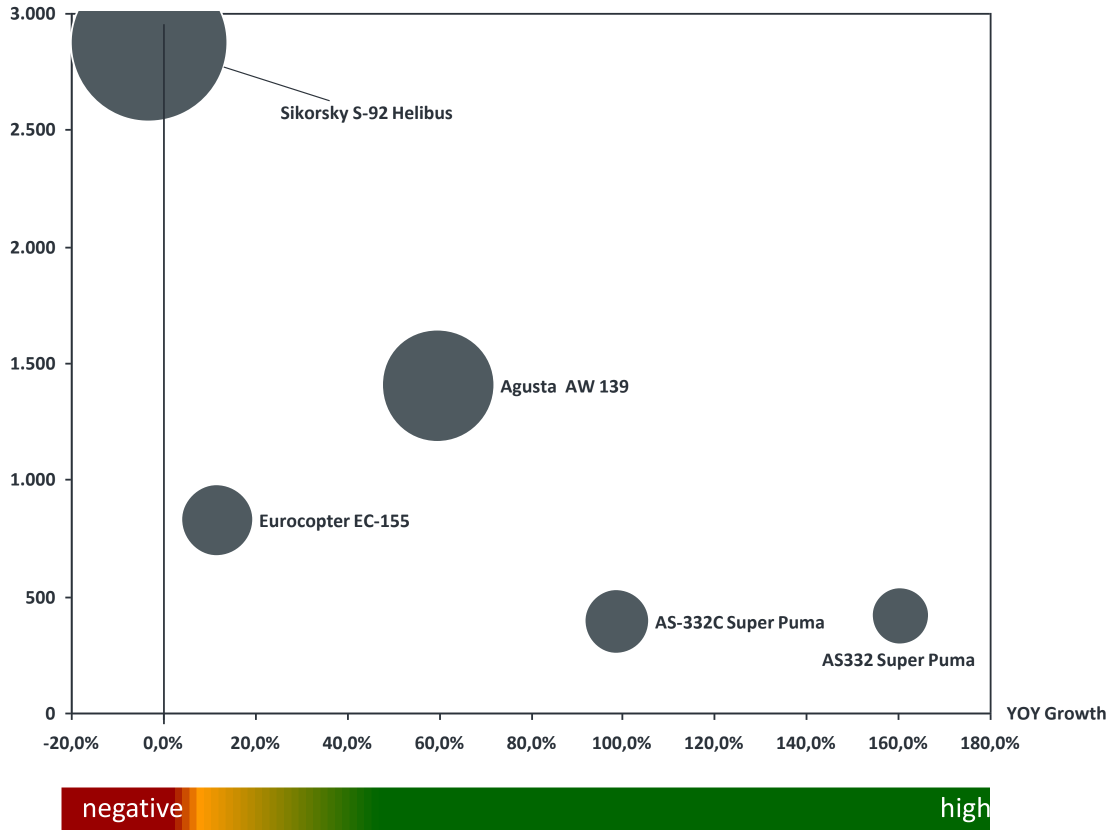
# Off-shore Heli departures by Top 5 types

Off-shore helicopter activity increased YOY in June for all OEMs except market leader Sikorsky. The Super Puma derivatives more than doubled utilisation YOY.

## THE BIG PICTURE

Departures June 2013




## 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

Major YOY gains at LOWS and EDDB, UKKK and EDDM. At the top, EGGW continues to grow, while LFPB lost considerable activity. Otherwise, big YOY declines at LIRA, LFMD and LIML.

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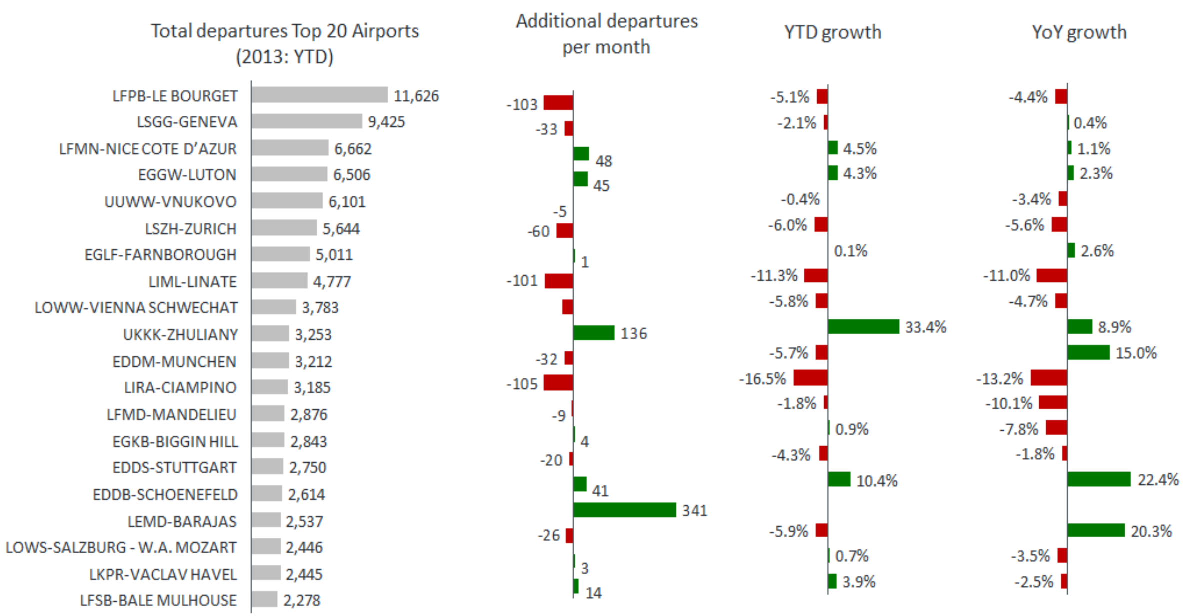
## THE BIG PICTURE




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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# 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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