WINGX ADVANCE

March 2013

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New: Bizliner

BUSINESS AVIATION MONITOR

Source: Fotolia

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Where are we in the industry cycle?

Sequential month activity is up. But with the seasonal effect taken out, March is flat on February. European business aviation is still deep in recession.

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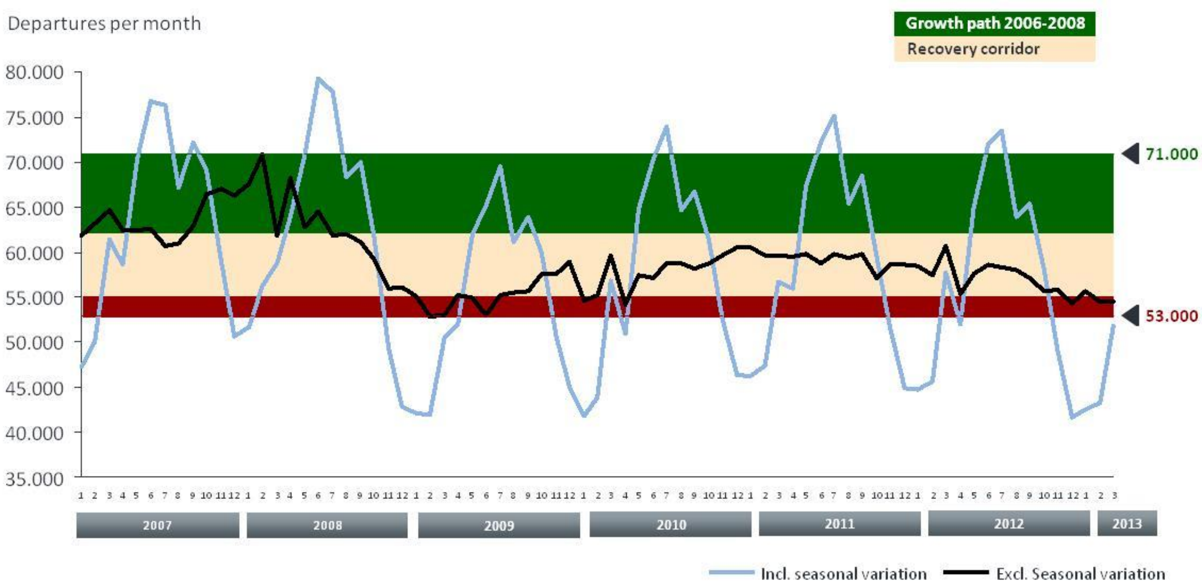
THE BIG PICTURE



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 March

A significant decline in overall activity, weighted by falls in Germany and France. There is still growth, but almost all in Eastern Europe.

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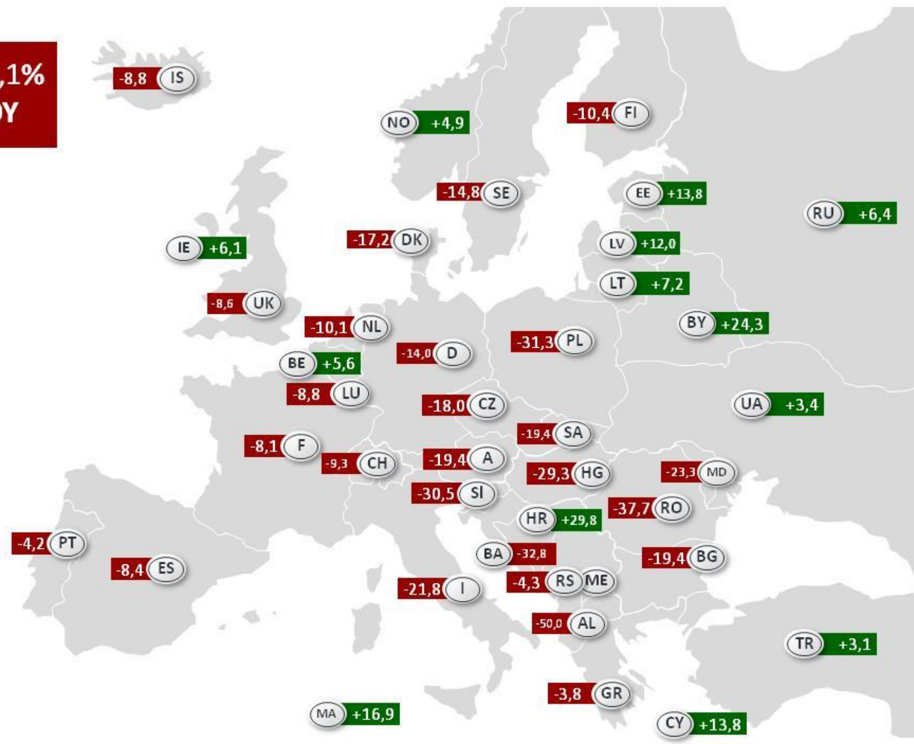
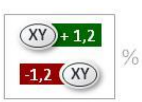
Total Europe: -10,1%
March 2013 YOY





Note: Only Charter and Private flights are considered

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 major falls in activity were in domestic flights in leading markets (also in Turkey). Rare bright spots include France-Spain, Spain-Switz, intra-Norway, intra-Ukraine and Netherlands-UK flows.

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EG: SW-SP
activity up 37%

Destination country

Origin country	France	Germany	UK	SWI	Italy	Spain	Austria	Russia	Sweden	Ukraine	Belgium	Turkey	NET	Poland	Norway	Greece
France	-10.6%	-7.4%	-16.6%	-12.2%	-0.5%	6.1%	-17.0%	21.1%	-3.4%	8.6%	-12.1%	29.0%	-8.4%	-12.8%	-25.0%	10.5%
Departures	4,702	462	846	882	436	297	127	350	28	63	218	40	141	41	9	21
Germany	-3.9%	-16.2%	-20.7%	-13.4%	-10.2%	21.4%	-23.2%	-11.1%	20.6%	-32.3%	-18.8%	26.9%	-29.3%	-7.2%	5.6%	0.0%
Departures	491	3,577	337	573	238	210	397	160	123	42	125	85	157	116	19	22
UK	-17.0%	-16.6%	-12.4%	-1.5%	-2.3%	-4.3%	-9.0%	-6.0%	-25.0%	-12.5%	-11.0%	7.3%	18.5%	10.5%	-9.8%	18.8%
Departures	837	346	3,036	530	209	223	81	156	33	28	113	44	199	21	37	19
Switzerland	-13.9%	-16.9%	4.0%	-12.3%	-17.2%	37.1%	-5.5%	7.0%	0.0%	34.7%	-7.6%	2.8%	-21.9%	-19.4%	-40.0%	7.1%
Departures	886	544	546	677	270	181	172	198	34	66	97	37	107	29	12	15
Italy	-8.9%	-11.2%	-2.4%	-17.3%	-36.2%	-1.8%	-12.4%	5.8%	-23.1%	-5.7%	-10.5%	76.5%	-16.3%	0.0%		-4.2%
Departures	411	231	207	263	1,267	110	99	109	10	33	34	30	36	24		23
Spain	6.5%	12.7%	-5.1%	13.9%	-26.9%	-24.0%	-15.2%	24.3%	100.0%	50.0%	9.7%	36.4%	28.0%	100.0%	0.0%	0.0%
Departures	296	177	206	164	87	657	28	46	10	6	34	15	32	10	3	3
Austria	-21.7%	-29.2%	5.2%	-6.3%	-14.9%	12.0%	-21.5%	5.8%	22.2%	10.8%	6.5%	-30.0%	-15.8%	-25.0%	-50.0%	-23.1%
Departures	119	368	81	178	103	28	545	91	11	41	33	14	32	27	1	10
Russia	17.5%	-17.2%	-9.7%	0.6%	-2.8%	10.8%	-10.8%	5.0%	66.7%	5.5%	0.0%	82.8%	23.8%	18.5%	25.0%	4.8%
Departures	342	159	140	174	103	41	91	21	20	191	11	106	26	32	10	22
Sweden	12.0%	1.8%	-15.6%	-6.1%	-11.1%	100.0%	36.4%	-20.0%	-20.5%	0.0%	120.0%	150.0%	-25.0%	-85.7%	12.7%	
Departures	28	115	38	31	8	16	15	12	859	1	11	5	9	3	62	0
Ukraine	3.0%	-20.6%	44.0%	14.0%	-17.1%	100.0%	8.8%	-2.6%	0.0%	2.0%	150.0%	33.3%	-20.0%	18.8%	-50.0%	-42.9%
Departures	68	50	36	57	29	6	37	186	1	673	5	20	4	19	1	4
Belgium	-5.9%	-12.3%	-5.2%	-9.6%	-14.6%	-13.9%	5.4%	-66.7%	175.0%	200.0%	55.0%	-20.0%	-20.4%	-38.5%		-66.7%
Departures	223	136	109	104	35	31	39	3	11	6	403	4	74	8	3	1
Turkey	71.4%	30.0%	-4.9%	-11.4%	10.0%	60.0%	-25.0%	89.5%	200.0%	5.3%	-83.3%	-6.6%	-33.3%	-60.0%	240.0%	0.0%
Departures	48	91	39	31	33	16	12	108	9	20	1	711	6	2	17	17
Netherlands	-10.3%	-19.6%	5.7%	-33.1%	-29.3%	-3.2%	20.0%	60.0%	0.0%	200.0%	-12.0%	400.0%	-8.2%	62.5%	0.0%	0.0%
Departures	148	181	204	87	29	30	36	24	9	6	81	10	201	13	4	1
Poland	2.4%	9.8%	31.6%	-34.0%	-7.7%	50.0%	-67.4%	9.1%	-95.7%	-5.9%	-11.1%	-20.0%	28.6%	-52.1%		
Departures	42	135	25	31	24	9	29	24	1	16	8	4	9	223	1	2
Norway	30.0%	18.8%	-23.8%	-56.3%	200.0%	-80.0%	-57.1%	50.0%	5.3%	-50.0%		183.3%	-42.9%		12.8%	
Departures	13	19	32	7	3	1	3	9	60	1	2	17	4	2	352	0
Greece	80.0%	-17.6%	35.3%	-12.5%	-10.3%	50.0%	-36.4%	-4.3%		-12.5%	50.0%	5.6%	400.0%			-18.6%
Departures	18	14	23	14	26	3	7	22	0	7	3	19	5	2	0	136

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)

Alongside Charter and Private flights, Other flights comprise a quarter of all business aviation activity. Other and Private flight activity fell heaviest in March, YOY.

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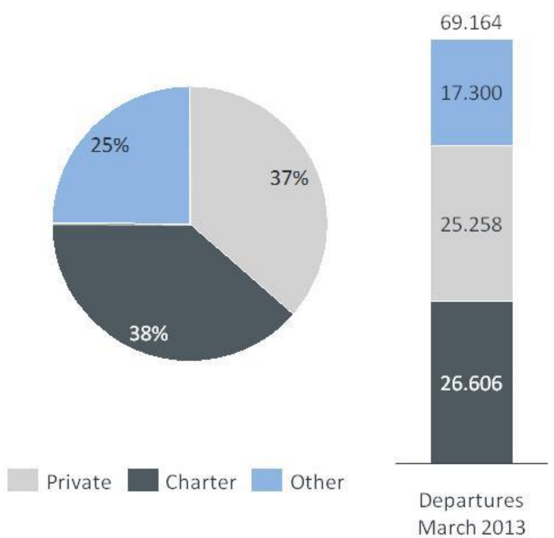
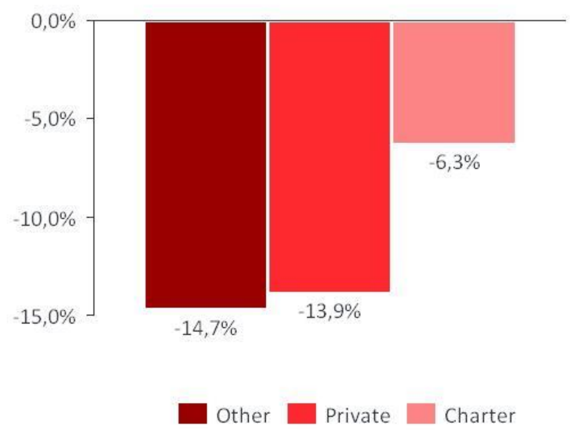
Distribution of departures



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

Bombardier and Pilatus were the only large OEM fleets in positive territory in March YOY. Decline in Piper aircraft activity had a major negative impact on the market.

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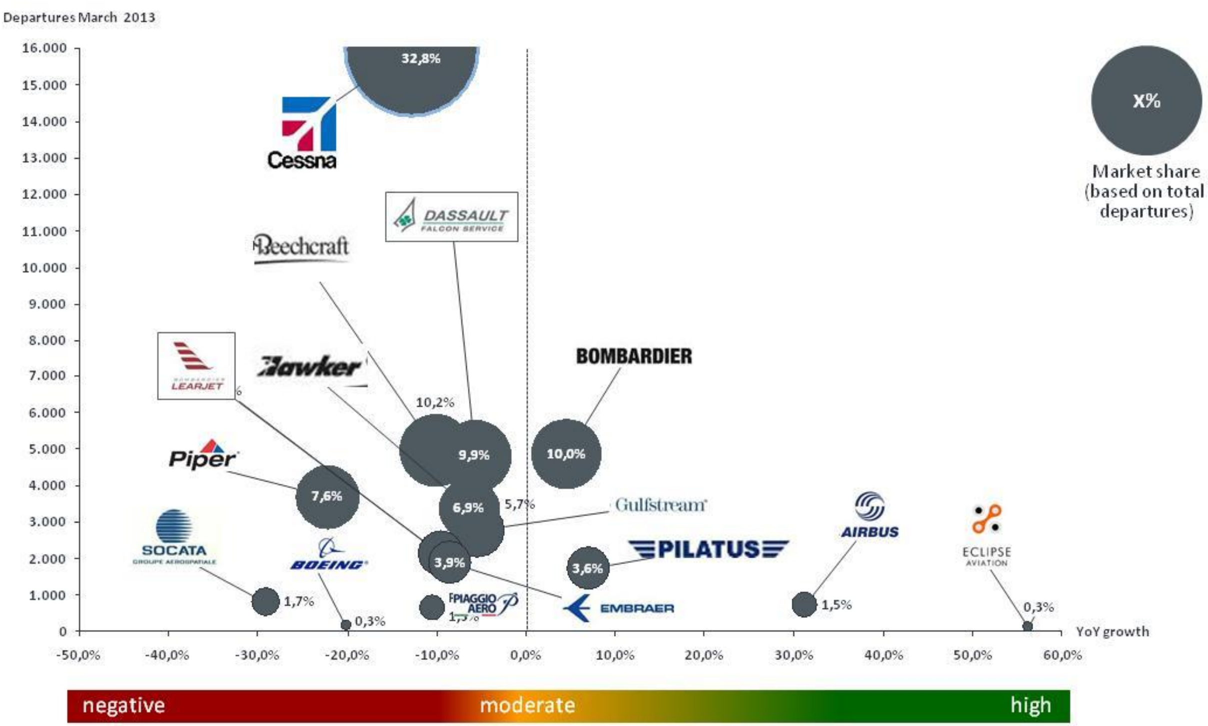

Note: Only Charter and Private flights are considered

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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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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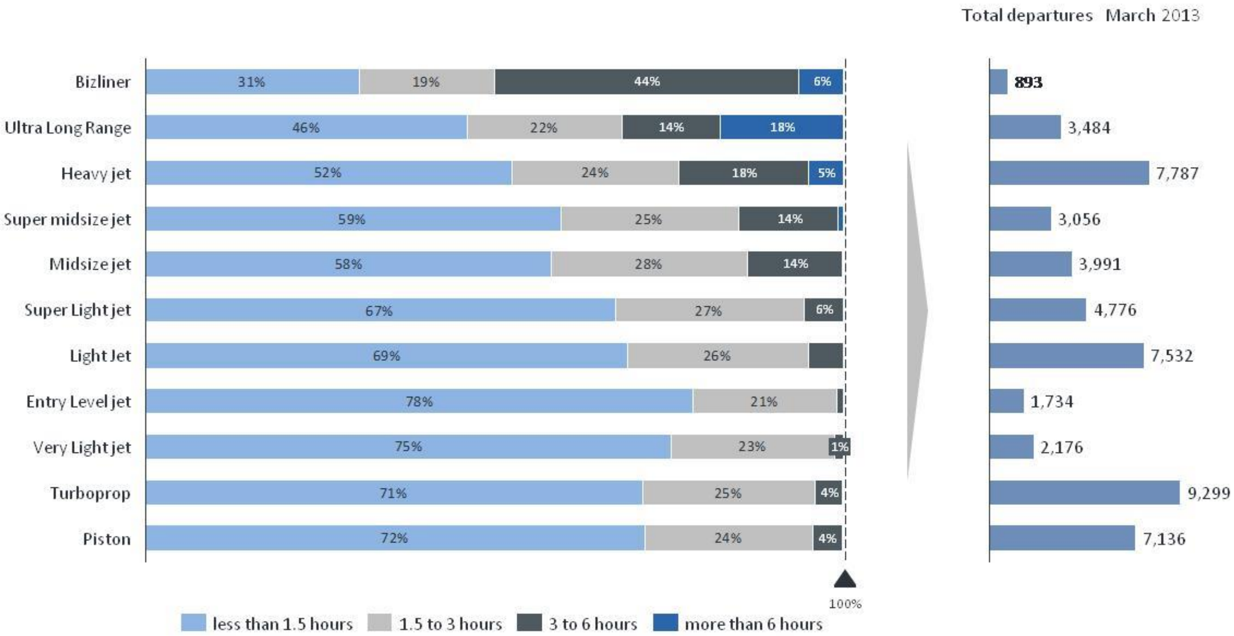

Note: Only Charter and Private flights are considered

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 25 Aircraft activity

YOY March 2012, the Bombardier 850 was stand out gainer, with Global Express and PC 12 flights buoying the market. XLS and Hawker 700/800 activity slumped. Cirrus SR22 flights fell back most.

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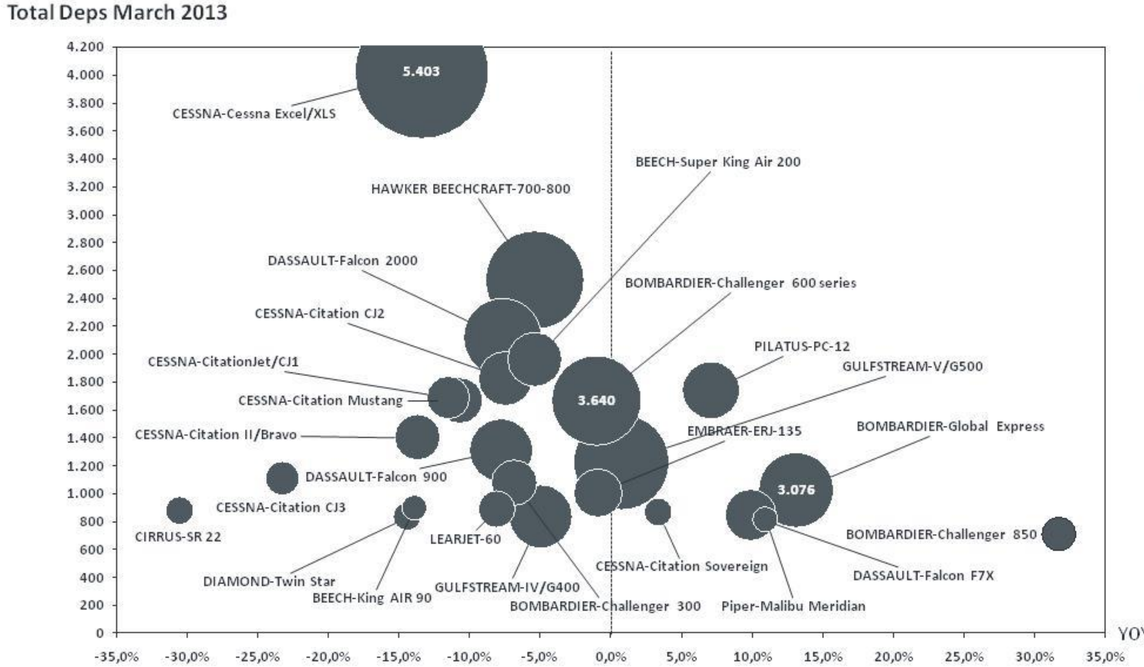

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THE INSIDE STORY

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

The market leading Sikorsky fleet lost more than 10% in March, YOY, in contrast to the Agusta fleet which significantly increased in popularity.

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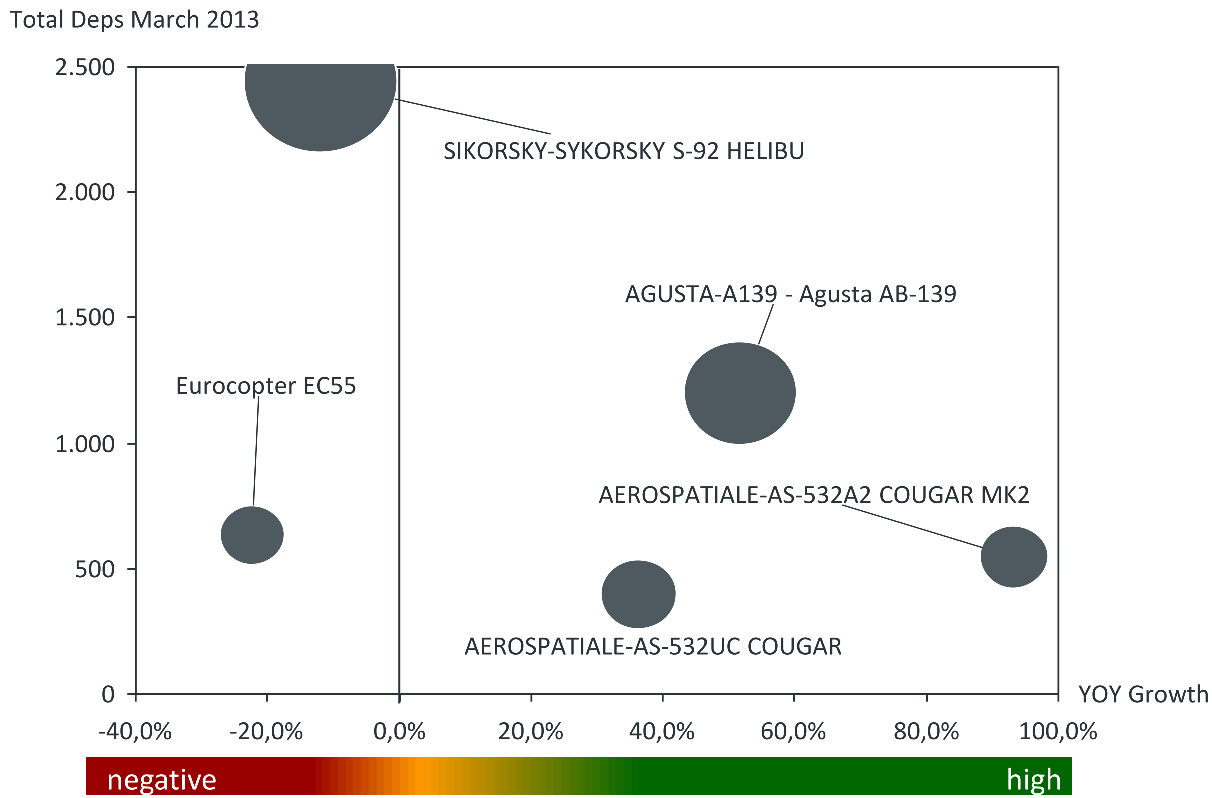

THE INSIDE STORY

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

More to come in Q2-2013

Top 20 Airport departures

Luton, Vnukovo and Nice were the only top airports to gain activity YOY in March. LBG is losing more than 100 flights/month in 2013. UKKK had a poor activity month but is well up for YTD.

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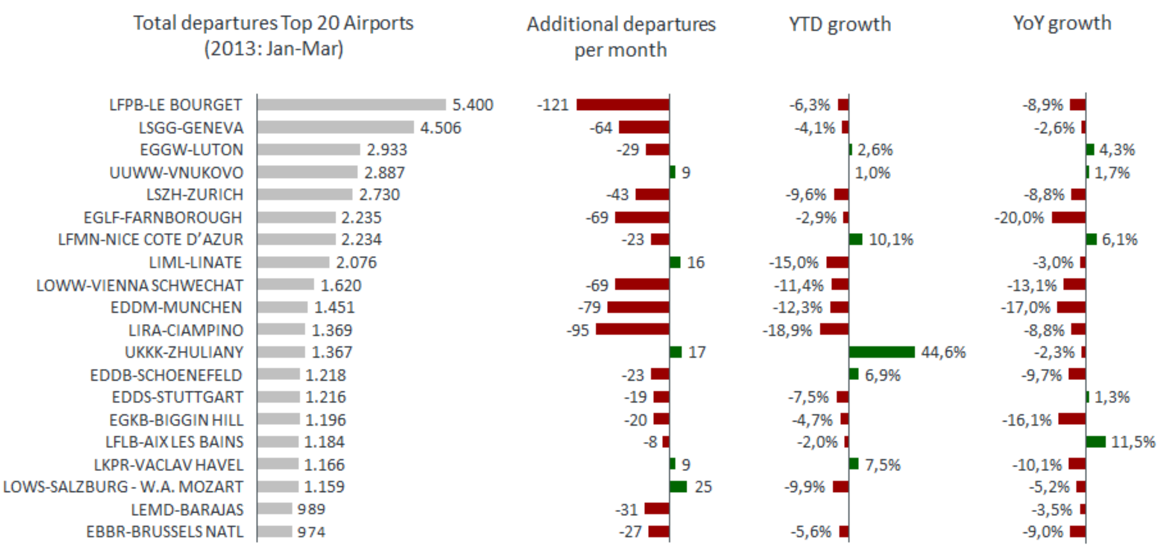

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THE INSIDE STORY

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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- 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.

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 forecasts.**

WINGX Strategic Consulting

- 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.

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 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
- 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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