

May 2013

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**BUSINESS AVIATION**  
**MONITOR**

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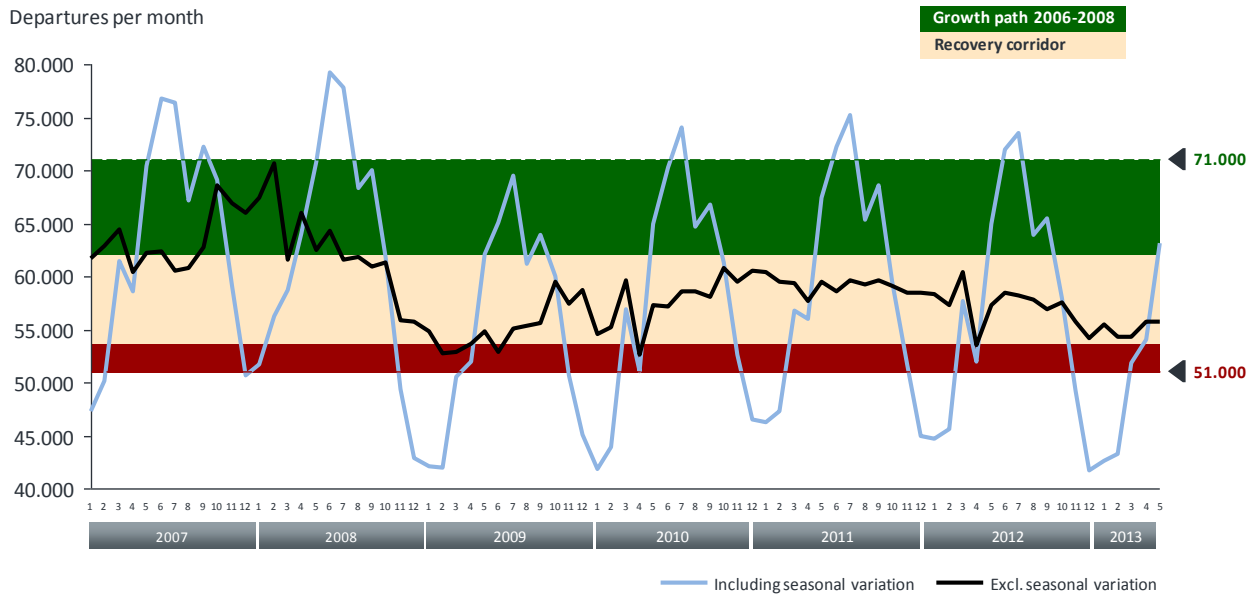
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# Where are we in the industry cycle?

May saw the standard seasonal uptick. Without the seasonal effect, activity was flat sequentially, with trending activity at the bottom of the recovery corridor.

## 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

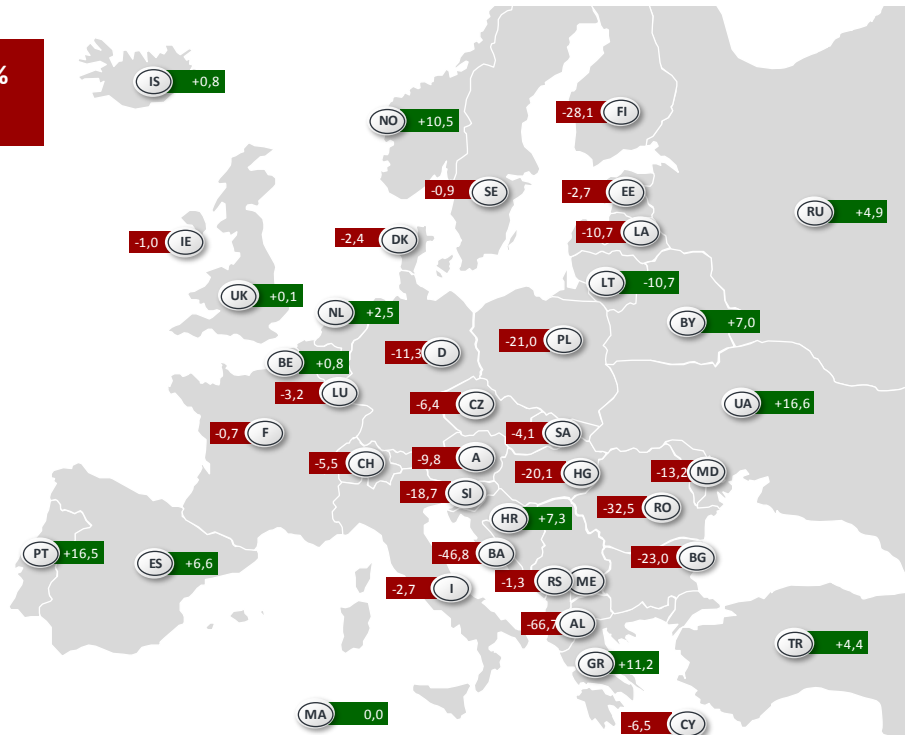


# European Business Aviation departure growth in May

The activity fall in May weighted by heavy declines in Germany, offset by small gains in the UK, bounce backs in parts of Southern Europe, and strong Eastern Europe & Russia

## THE BIG PICTURE

Total Europe: -2,7%  
May 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



# Regional flow of departures between principal markets

Connections with the UK, Spain, UK and Greece mostly up YOY, as was domestic activity in France and Turkey. UK and Germany domestic activity fell sharply.

## THE BIG PICTURE

EG: Italy-Spain activity up 14%

Departures May 2013

	France	Germany	UK	Italy	Switzerland	Spain	Austria	Turkey	Russia	Sweden	Ukraine	Belgium	Netherlands	Poland	Greece	Norway
France	4.2%	-17.0%	-0.6%	3.7%	-12.7%	0.5%	-17.1%	-2.0%	2.6%	50.0%	5.4%	-8.0%	-15.0%	35.0%	36.1%	-4.8%
Departures	5,469	577	1,236	668	351	436	131	49	310	45	59	289	142	54	49	20
Germany	-19.2%	-14.5%	-6.6%	-7.8%	-4.9%	14.5%	-13.1%	7.1%	-22.2%	1.7%	-40.6%	-19.4%	11.0%	-10.5%	46.5%	-37.5%
Departures	564	3,977	510	388	524	285	437	182	172	118	41	125	191	154	63	20
UK	-0.4%	-10.6%	-6.1%	45.3%	-0.3%	8.8%	10.7%	10.6%	46.9%	13.7%	42.9%	-14.9%	14.8%	-18.2%	17.5%	34.1%
Departures	1,238	499	3,748	404	398	372	83	52	188	58	40	126	186	27	47	59
Italy	13.2%	-8.6%	29.6%	-12.6%	10.6%	14.2%	-8.4%	26.3%	-8.7%	-31.6%	3.8%	28.9%	-36.4%	-7.4%	60.5%	-75.0%
Departures	710	371	363	1,992	450	177	141	48	147	13	54	58	35	25	69	1
Switzerland	-9.0%	-11.9%	5.3%	6.0%	-8.2%	-2.0%	-22.4%	8.8%	-20.5%	0.0%	4.9%	-27.6%	4.9%	-45.0%	122.2%	-25.0%
Departures	991	504	438	421	507	197	135	37	97	29	43	63	64	22	40	6
Spain	4.7%	1.9%	9.6%	29.0%	2.3%	2.0%	20.9%	40.0%	14.3%	166.7%	100.0%	18.4%	-16.1%	12.5%	-42.9%	128.6%
Departures	469	267	366	187	179	959	52	14	64	16	10	45	47	9	4	16
Austria	-7.5%	-13.6%	18.0%	-5.1%	-18.1%	28.3%	-8.7%	-30.0%	-22.5%	-20.0%	25.0%	0.0%	9.5%	0.0%	109.1%	100.0%
Departures	147	427	72	148	140	59	566	14	69	8	45	21	23	23	23	2
Turkey	-9.1%	11.0%	35.7%	8.9%	-17.1%	84.6%	5.0%	8.7%	-18.8%	-55.6%	42.5%	-66.7%	85.7%	58.3%	18.8%	-33.3%
Departures	50	171	57	49	29	24	21	982	181	4	57	2	13	19	38	2
Sweden	43.3%	12.0%	14.0%	-25.0%	-29.4%	550.0%	-28.6%	-16.7%	175.0%	-3.1%	100.0%	-10.0%	-26.7%	18.8%	-100.0%	-25.3%
Departures	43	140	57	12	24	13	10	5	33	1,146	2	9	11	19	0	65
Russia	4.1%	-27.2%	28.7%	-1.9%	-1.9%	2.0%	-19.0%	-15.1%	0.0%	88.9%	-2.4%	42.9%	85.7%	-26.7%	44.8%	44.4%
Departures	279	169	175	151	102	50	68	186	27	34	201	10	26	22	42	13
Ukraine	-5.8%	-33.3%	31.3%	4.9%	0.0%	66.7%	55.6%	88.2%	3.6%	0.0%	20.3%	50.0%		86.7%	25.0%	-100.0%
Departures	49	44	42	43	44	10	42	64	203	1	895	6	5	28	25	0
Belgium	-10.2%	-20.6%	-3.1%	30.0%	-12.9%	20.6%	-44.8%	0.0%	18.2%	-10.0%	100.0%	14.1%	7.6%	-25.0%	600.0%	-16.7%
Departures	283	127	126	65	74	41	16	4	13	9	6	332	71	12	7	5
Netherlands	-11.5%	-5.3%	11.7%	-27.8%	4.9%	-6.4%	33.3%	80.0%	82.4%	-11.1%		-1.4%	18.2%	-52.9%	200.0%	-16.7%
Departures	138	179	200	39	64	44	24	9	31	16	4	68	208	8	6	5
Poland	-9.4%	-7.3%	-16.7%	0.0%	-35.1%	-28.6%	-48.6%	70.0%	-19.0%	-5.6%	87.5%	-13.3%	-41.2%	-30.6%		-40.0%
Departures	48	164	25	32	24	5	37	17	17	17	30	13	10	311	3	3
Greece	33.3%	23.7%	35.3%	51.1%	64.0%	0.0%	46.2%	-8.1%	89.7%		60.0%	0.0%	0.0%	200.0%		-11.0%
Departures	48	47	46	71	41	8	19	34	55	0	24	4	2	3	242	1
Norway	22.2%	-34.5%	2.1%	50.0%	16.7%	112.5%	0.0%	-60.0%	12.5%	-18.3%	0.0%	100.0%	-60.0%	150.0%		23.6%
Departures	22	19	48	3	7	17	2	2	9	67	1	6	4	5	0	388

## 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



Note: Only Charter and Private flights are considered

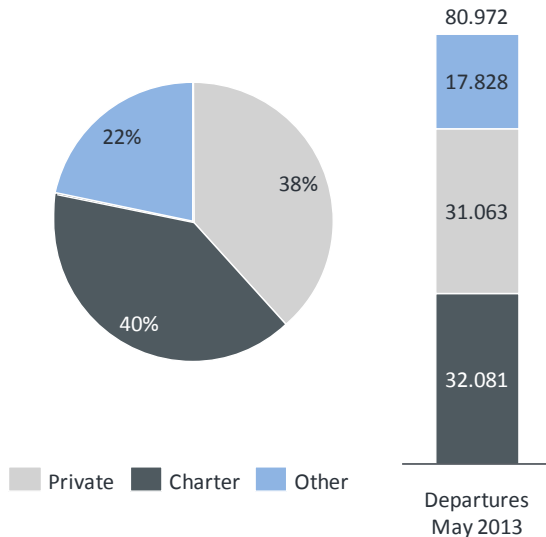
# Activity by flight filing (mission)

Private flight declines are having most effect on the market. Charter flights are almost holding their own. The less significant share of 'other' flights also fell heavily YOY.

## THE BIG PICTURE

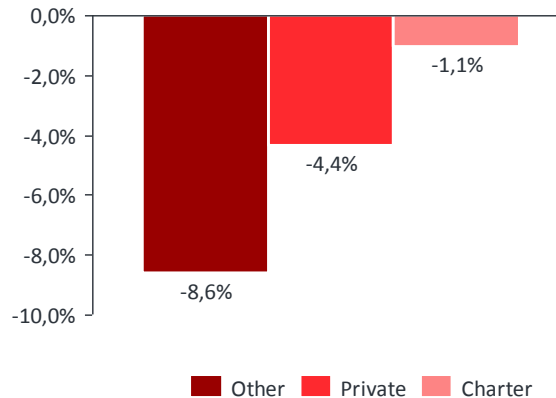
Departures May 2013

### Distribution of departures



Other flights include: Government, Military, Medical, Training

### YOY growth



## THE INSIDE STORY

### For region by region:

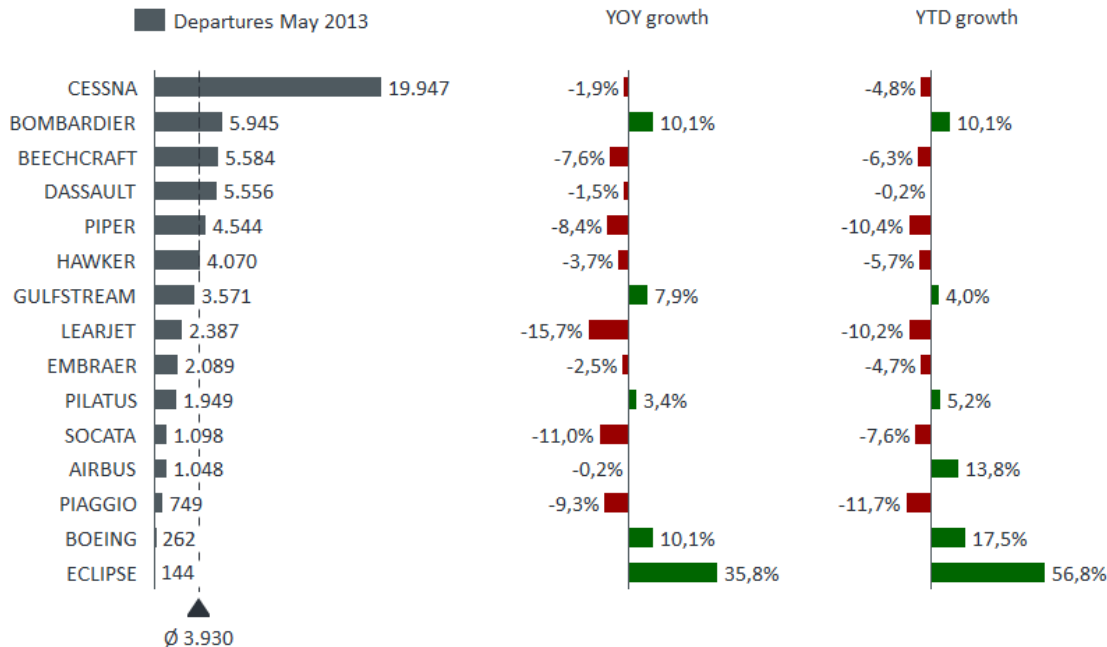
- Each of last 12 months' private and charter activity
- Analysis of sector length growth by aircraft size segment and seat capacity segment
- Distinction between intra and outbound Euro region activity



# Airframe OEM performance and market shares

Bombardier and Gulfstream continue 2013 positive trend. Beechcraft and Learjet fleets had poor months. Piper is most down for the year. Pilatus is robust, and Eclipse is still fast emerging.

## 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



# Number of departures by aircraft segment and trip category

Only the Gulfstream fleet is gaining both private and charter flights. Bombardier aircraft had the biggest charter gains, Piper the biggest declines. Embraer gained significant Private flights.

## THE BIG PICTURE

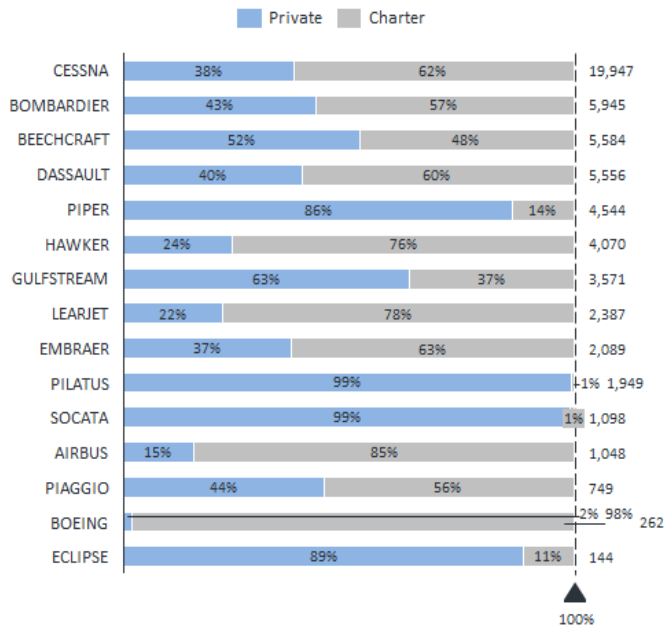
## THE INSIDE STORY

### 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

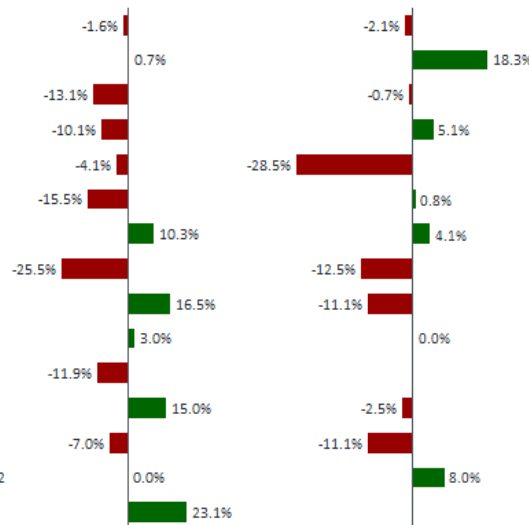


Departures May 2013



YOY growth Private

YOY growth Charter



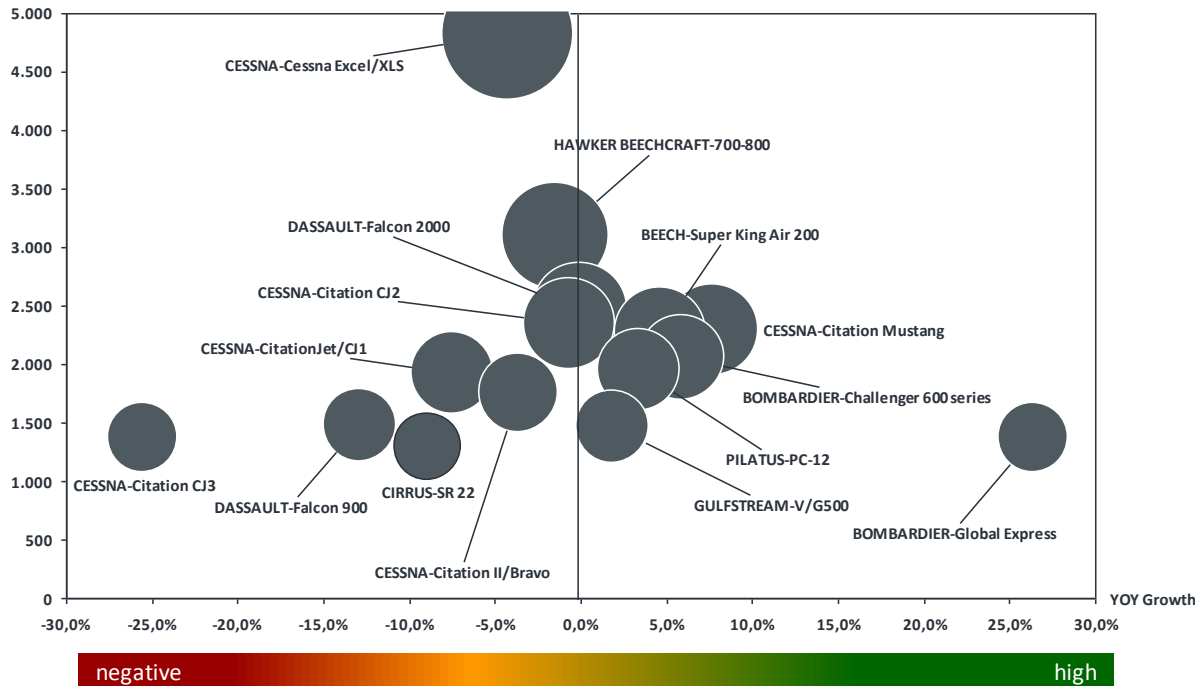
Note: Only Charter and Private flights are considered

# Top 15 Aircraft activity, by flight departures YOY

In May, the Global Express was standout gainer in departures, mirrored by the CJ3's declines. Notably the King Air 200 bucked the overall turboprop fleet decline, with strong gains.

## THE BIG PICTURE

Total Deps May 2013



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



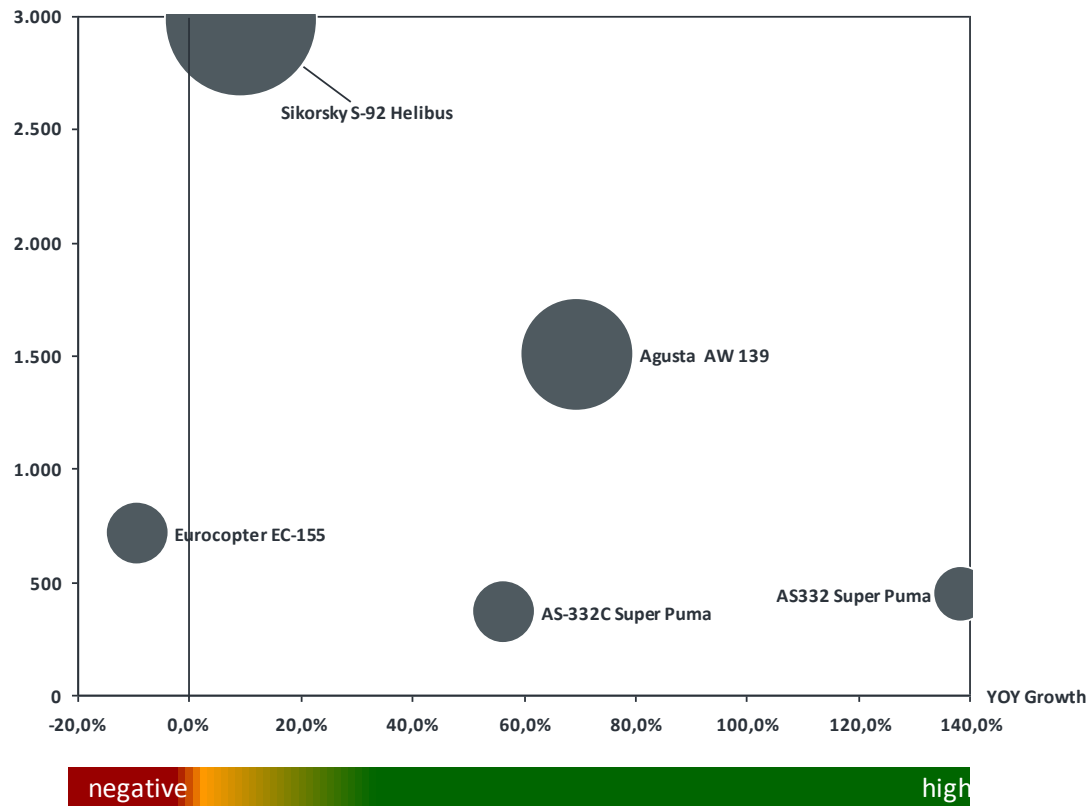


# Off-shore Heli departures by Top 5 types

Off-shore helicopter activity was generally well-up in May, with very significant gains in Super Puma and Agusta fleets, small declines in the Eurocopter fleet.

## THE BIG PICTURE

Total Deps May 2013



## THE INSIDE STORY

### Activity by Off Shore Helicopter activity

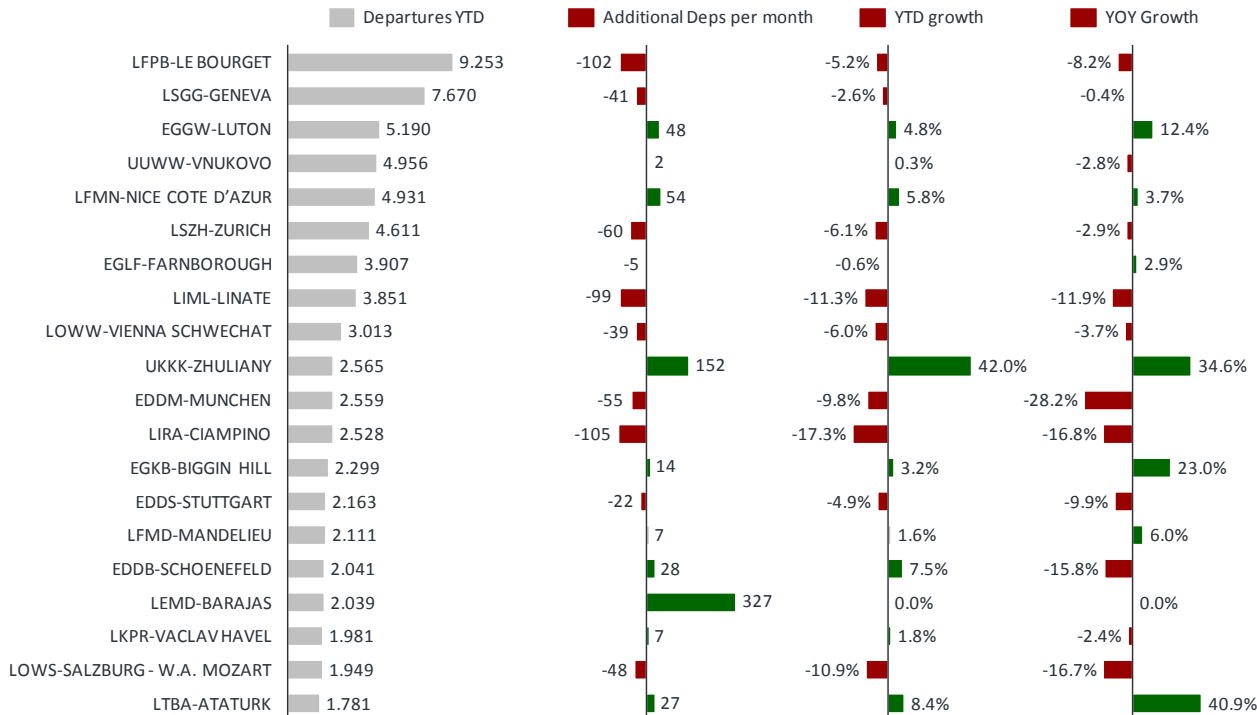
- Leading airports and trending O&Ds
- Fuel consumption and engine usage
- Analysis of mission type
- Map of O&D trends over last 12m



# Top 20 Airport departures

LFPB continued to lose ground, down >100 departures/month this year. EGGW is catching up, with consistent growth. EGKB, LFMD and LTBA had good months, EDDM and EDDB bad ones.

## THE BIG PICTURE



Note: Torrejon closed for private aviation in January 2013, leading to a major switch to Barajas. The resulting % change is not shown so as not to distort the overall chart

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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- › 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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## 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 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).

## DISCLAIMER:

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