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Airlines see steady traffic returns

Global passenger traffic among the top 200 carriers grew by 5.5% in 2013, the latest *Airline Business*/Flightglobal World Airline Rankings show – slightly ahead of the extra capacity added. Among these operators, low-cost carriers grew fastest at around 9%, while the most profitable region, North America, was also the one which added the least capacity

North America 1.9%

Europe 5.5%

Middle East 10.6%

Asia-Pacific 7.7%

Africa 2.0%

Latin America 5.7%

Regional traffic changes are based on RPKs for the top 200 airlines

KEY

- Star Alliance
- SkyTeam
- Oneworld
- Unaligned
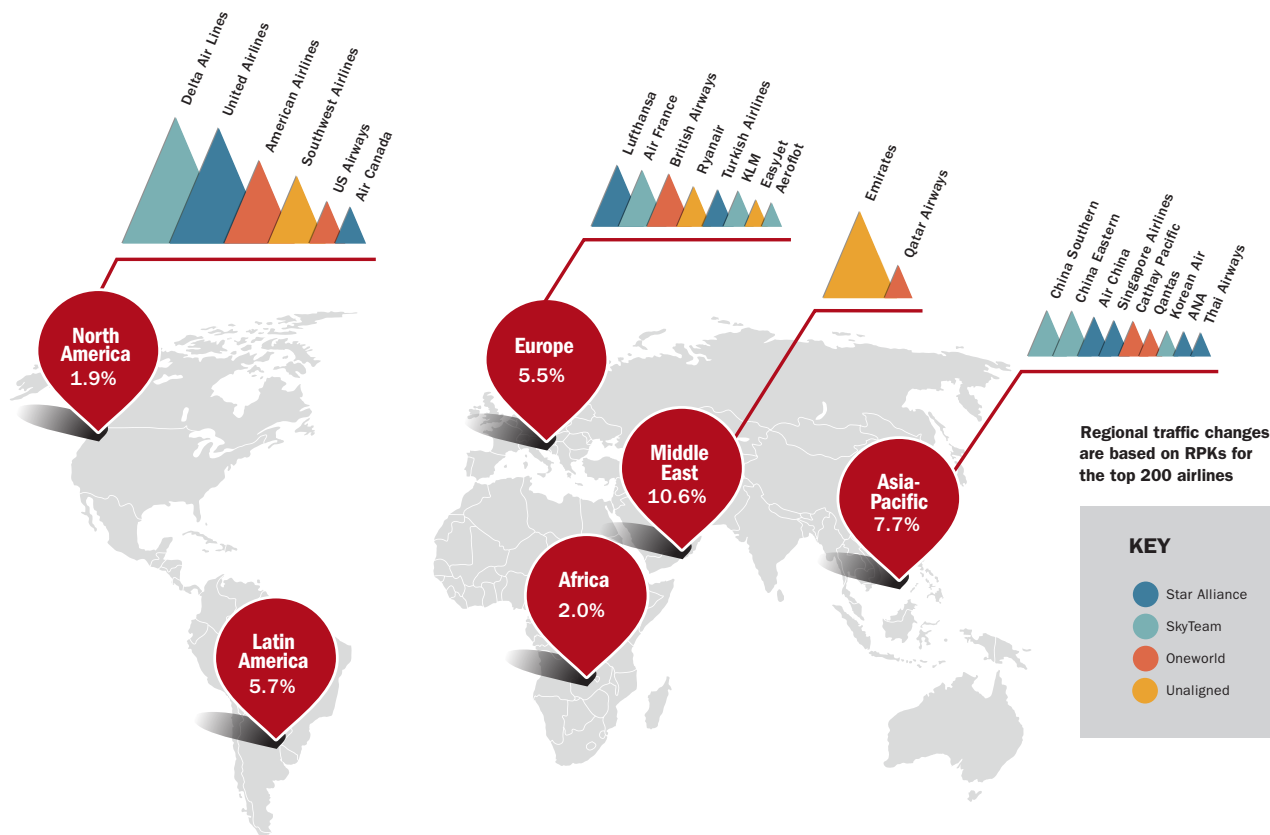
TOP 200 PASSENGER AIRLINE STATISTICS BY AIRLINE TYPE: 2013

Airline Type	Pax traffic (RPK)		Load factors		Passenger numbers		Employee
	Million	Change (%)	Percent	Pt change	Million	Change (%)	share (%)
Leisure	231,240	3.9	87.3	0.4	84	4.2	1.4
Low-cost	919,700	9.0	81.4	0.0	724	8.3	8.5
Mainline	4,431,743	5.0	79.6	0.3	1,948	4.1	88.8
Regional	161,136	3.6	78.3	0.5	188	2.4	1.3
TOTAL	**5,743,819**	**5.5**	**80.1**	**0.3**	**2,944**	**5.0**	**100.0**

NOTE: Based on returns to the latest Top 200 ranking

TOP 200 PASSENGER AIRLINE STATISTICS BY REGION: 2013

Region	Passenger traffic (RPK)		Load factors		Passenger numbers		Employee
	Million	Change (%)	Percent	Pt change	Million	Change (%)	share (%)
Africa	110,990	2.0	69.9	-0.4	48	4.0	3.9
Asia Pacific	1,710,462	7.7	78.3	0.1	916	8.7	32.5
Europe	1,626,570	5.5	81.6	0.7	809	5.1	24.4
Latin America	279,226	5.7	78.2	1.5	195	4.1	8.0
Middle East	490,770	10.6	77.3	-0.2	146	7.082	6.3
North America	1,525,801	1.9	83.0	0.2	831	1.1	24.9
TOTAL	**5,743,819**	**5.5**	**80.1**	**0.3**	**2,944**	**5.0**	**100.0**

NOTE: Based on returns to the latest Top 200 ranking

TOP 20 AIRLINE GROUPS BY TRAFFIC

Rank	Airline group	RPK (m)
1	American Airlines Group	346,805
2	Delta Air Lines	313,736
3	United Continental Holdings	287,332
4	Air France-KLM Group	228,863
5	Emirates Airline	215,353
6	Lufthansa Group	209,649
7	IAG	186,304
8	Southwest Airlines	168,078
9	China Southern Airlines Group	148,416
10	Air China	141,966
11	China Eastern Airlines	120,461
12	Qantas	110,905
13	LATAM Airlines Group	106,466
14	Cathay Pacific Group	104,571
15	Singapore Airlines	100,527
16	Ryanair	100,000
17	Turkish Airlines	92,003
18	Air Canada	91,372
19	Aeroflot	84,918
20	Qatar Airways	82,438

TOP 100 PASSENGER OPERATIONS

TOP PASSENGER OPERATIONS RANKED BY TRAFFIC 2013: 1 TO 50

Ranking 2013 (2012)		Airline	Country	Passenger traffic (RPK)		Seat capacity (ASK)		Load factor		Passenger number		Fleet
				Million	Change (%)	Million	Change (%)	Percent	Pt change	Million	Change (%)	Current
1	(1)	Delta Air Lines	USA	313,736	1.0	374,479	1.0	83.8	0.0	164.7	0.0	759
2	(2)	United Airlines	USA	287,305	-0.5	342,680	-1.5	83.8	0.9	90.3	-2.4	698
3	(4)	Emirates Airline	UAE	215,353	14.2	271,133	14.6	79.4	-0.3	44.5	13.1	209
4	(3)	American Airlines	USA	206,616	1.6	248,589	1.2	83.1	0.3	87.0	0.6	631
5	(5)	Southwest Airlines	USA	168,078	1.5	209,979	1.7	80.0	-0.2	133.2	-0.6	676
6	(6)	Lufthansa	Germany	153,334	2.3	193,807	1.0	79.1	1.0	76.3	1.4	281
7	(7)	Air France	France	136,435	0.5	165,350	-0.8	82.5	1.0	47.8	-5.5	241
8	(8)	British Airways	UK	131,333	3.9	161,444	2.0	81.3	1.5	40.0	6.3	266
9	(9)	China Southern Airlines	China	121,786	8.6	151,467	8.9	80.4	-0.2	71.1	5.0	462
10	(10)	China Eastern Airlines	China	120,461	10.4	152,075	11.2	79.2	-0.6	79.1	8.2	256
11	(11)	US Airways	USA	105,571	5.1	124,494	4.3	84.8	0.7	56.8	4.6	343
12	(13)	Air China	China	104,234	8.6	128,784	8.3	80.9	0.2	52.0	5.5	296
13	(12)	Ryanair est	Ireland	100,000	3.8	120,000	2.4	83.0	0.8	81.7	3.0	303
14	(15)	Singapore Airlines	Singapore	95,064	1.4	120,503	1.9	78.9	-0.4	18.6	2.3	104
15	(14)	Cathay Pacific	Hong Kong	93,691	-0.5	112,038	-3.5	83.6	2.5	21.4	1.5	136
16	(19)	Turkish Airlines	Turkey	92,003	23.2	116,423	21.1	79.0	1.3	48.3	23.6	228
17	(16)	Air Canada	Canada	91,372	2.1	110,334	1.9	82.8	0.1	35.8	2.6	162
18	(17)	KLM	Netherlands	89,039	3.2	103,793	3.0	85.8	0.1	26.6	3.1	113
19	(20)	Qatar Airways	Qatar	82,438	12.0	109,794	13.8	75.1	-1.2	19.4	10.9	132
20	(18)	Qantas	Australia	72,921	-4.0	90,944	-2.8	80.2	-1.0	22.6	-1.1	124
21	(21)	Korean Air	South Korea	68,361	-0.7	89,111	0.9	76.7	-1.2	23.6	-3.9	155
22	(22)	EasyJet	UK	67,573	3.6	74,223	2.8	91.0	0.7	60.8	4.1	200
23	(23)	All Nippon Airways	Japan	66,775	6.8	98,128	5.6	68.0	0.8	45.7	2.5	181
24	(24)	Thai Airways International	Thailand	63,479	4.6	85,655	8.1	74.1	-2.5	21.5	4.3	88
25	(27)	Aeroflot	Russia	60,226	19.2	76,429	17.8	78.8	0.9	20.9	18.4	144
26	(25)	TAM Linhas Aereas	Brazil	59,255	0.2	74,354	-3.9	79.7	3.2	37.4	-1.0	157
27	(26)	JetBlue Airways	USA	57,660	6.8	68,904	6.9	83.7	-0.1	30.5	5.2	197
28	(31)	Etihad Airways	UAE	55,500	16.2	71,100	16.4	78.0	-0.2	11.5	12.2	94
29	(30)	Japan Airlines	Japan	49,163	2.7	67,444	1.2	72.9	1.0	24.1	0.8	118
30	(28)	Air Berlin	Germany	48,575	-3.6	57,251	-5.1	84.8	1.3	31.5	-5.4	102
31	(37)	Malaysia Airlines	Malaysia	47,286	27.2	58,381	17.4	81.0	6.3	17.2	28.5	96
32	(33)	Saudia	Saudi Arabia	47,038	7.4	65,035	6.3	72.3	0.7	25.3	4.0	164
33	(34)	Transaero Airlines	Russia	47,018	14.7	56,235	13.1	83.6	1.1	12.5	21.0	98
34	(32)	LAN Airlines est1	Chile	47,000	5.6	57,000	3.6	82.5	1.5	29.5	9.3	81
35	(36)	Alaska Airlines	USA	42,111	7.2	48,931	7.9	86.1	-0.6	19.7	6.5	136
36	(29)	Iberia	Spain	41,493	-16.5	52,429	-14.0	79.1	-2.4	10.6	-28.8	72
37	(35)	Virgin Atlantic Airways	UK	39,538	0.3	50,331	-0.3	78.6	0.5	5.9	8.1	42
38	(39)	Alitalia est	Italy	35,570	-1.7	47,700	-1.7	74.6	0.0	24.0	-1.2	103
39	(40)	Swiss Int'l Air Lines	Switzerland	35,093	4.7	41,918	3.7	83.7	0.8	16.0	0.9	64
40	(44)	Shenzhen Airlines	China	34,724	11.4	42,545	10.4	81.6	0.7	23.8	11.0	138
41	(38)	Gol Transportes Aereos	Brazil	34,684	-4.7	49,633	-4.3	69.9	-0.3	36.3	-7.3	132
42	(41)	China Airlines	Taiwan	34,210	4.1	44,314	4.2	77.2	-0.1	12.2	6.3	76
43	(46)	Lion Air est	Indonesia	33,500	10.2	38,000	10.6	88.5	0.0	34.1	10.4	103
44	(50)	Air India	India	32,902	15.0	44,623	9.3	73.7	3.3	15.6	11.8	91
45	(43)	Asiana Airlines	South Korea	32,751	4.5	44,492	5.4	73.6	-0.6	15.3	3.4	84
46	(42)	Thomson Airways	UK	31,575	-1.6	34,163	-2.0	92.4	0.4	10.5	-1.4	58
47	(48)	WestJet	Canada	31,522	7.3	38,569	8.6	81.7	-1.0	18.5	6.1	106
48	(45)	Virgin Australia	Australia	31,300	0.6	41,766	5.0	74.9	-3.3	19.3	-0.7	100
49	(49)	Avianca	Colombia	31,197	7.3	38,774	6.1	80.5	0.9	24.6	6.6	74
50	(58)	Hainan Airlines	China	30,422	22.1	35,434	19.0	85.9	2.2	16.6	22.6	121

NOTES: est RPK/ASK/load factor estimated based on full-year passenger data; est1 *Airline Business* estimate; Air Berlin includes Niki; Virgin Australia includes SkyWest Australia for May and June only; Avianca includes TACA

TOP PASSENGER OPERATIONS RANKED BY TRAFFIC 2013: 51 TO 100

Ranking 2013 (2012)	Airline	Country	Passenger traffic (RPK) Million	Change (%)	Seat capacity (ASK) Million	Change (%)	Load factor Percent	Pt change	Passenger number Million	Change (%)	Fleet Current
51 (47)	Jet Airways	India	29,747	0.8	38,064	1.7	78.2	-0.6	17.2	2.2	79
52 (51)	SAS	Sweden	28,854	3.8	39,202	6.0	73.6	-1.5	25.4	-0.1	144
53 (55)	Jetstar	Australia	28,673	10.7	36,262	10.8	79.1	-0.1	16.8	9.0	72
54 (52)	TAP Portugal	Portugal	28,152	3.4	35,451	0.0	79.4	2.6	10.7	4.9	59
55 (57)	Garuda Indonesia	Indonesia	27,754	10.6	37,684	14.6	73.7	-2.7	19.6	11.8	118
56 (53)	Air New Zealand	New Zealand	27,733	2.7	33,167	1.7	83.6	0.8	13.4	2.2	50
57 (54)	EVA Air	Taiwan	27,681	6.5	34,765	6.1	79.6	0.3	8.0	6.4	63
58 (56)	ExpressJet Airlines	USA	27,115	6.2	34,025	5.6	79.7	0.5	33.0	1.8	412
59 (69)	Norwegian	Norway	26,881	32.1	34,318	32.4	78.3	-0.2	20.7	17.1	89
60 (66)	Sichuan Airlines	China	26,665	18.1	31,967	18.3	83.4	-0.1	16.7	15.7	89
61 (65)	AirAsia	Malaysia	25,333	11.4	31,582	11.3	80.2	0.1	21.9	11.0	78
62 (61)	Aeromexico	Mexico	25,010	6.5	32,496	5.8	77.0	0.5	15.5	4.6	61
63 (64)	Vietnam Airlines est	Vietnam	25,000	9.9	31,500	5.7	79.5	3.2	14.7	7.5	81
64 (60)	Finnair	Finland	24,776	5.1	31,162	2.6	79.5	1.9	9.3	5.6	45
65 (59)	Condor	Germany	24,621	3.5	27,322	1.2	90.1	2.0	6.8	2.8	41
66 (68)	Xiamen Airlines	China	24,210	12.3	32,326	15.3	74.9	-2.0	18.6	10.5	104
67 (63)	SkyWest Airlines	USA	24,061	5.4	29,273	5.1	82.2	0.2	27.1	3.7	339
68 (70)	Copa Airlines	Panama	23,383	16.3	30,490	14.4	76.7	1.2	7.8	8.9	75
69 (62)	South African Airways	South Africa	23,124	1.0	30,987	-0.3	74.6	0.9	7.1	0.9	54
70 (72)	IndiGo	India	22,856	20.4	28,832	22.6	79.3	-1.4	19.2	21.7	78
71 (71)	Hawaiian Airlines	USA	22,007	12.0	27,008	14.3	81.5	-1.7	9.9	4.8	48
72 (67)	Thomas Cook Airlines	UK	19,809	-11.2	21,285	-10.2	93.1	-1.0	6.1	-10.3	34
73 (78)	Air Europa	Spain	19,427	10.5	22,931	6.9	84.7	2.8	8.7	7.3	50
74 (83)	Spirit Airlines	USA	19,310	24.2	22,303	22.2	86.6	1.4	12.4	19.1	57
75 (74)	Egyptair	Egypt	18,914	2.2	29,460	4.0	64.2	-0.8	9.4	8.7	59
76 (76)	El Al	Israel	18,676	4.4	22,533	3.9	82.9	0.5	4.4	4.0	35
77 (80)	Ethiopian Airlines	Ethiopia	18,424	13.9	25,728	14.9	71.6	-0.6	5.2	12.6	58
78 (81)	Wizz Air est	Hungary	18,000	12.5	21,000	13.5	86.1	0.4	13.5	11.6	50
79 (75)	Austrian	Austria	17,705	-1.4	22,528	-2.7	78.6	1.1	11.3	-1.6	40
80 (90)	Vueling Airlines	Spain	17,109	24.9	21,485	21.9	79.6	1.9	17.2	16.4	89
81 (85)	UTair	Russia	16,770	10.6	21,836	6.9	76.8	2.6	8.7	4.8	311
82 (77)	Philippine Airlines est1	Philippines	16,500	-6.9	23,500	-7.5	70.0	0.2	7.0	-8.2	60
83 (95)	Pegasus Airlines	Turkey	16,231	27.8	20,162	22.7	80.5	3.2	16.8	23.9	42
84 (73)	Air Transat est	Canada	16,000	-13.6	17,500	-13.3	92.0	0.2	3.3	-13.6	23
85 (79)	Frontier Airlines	USA	15,861	-6.9	17,484	-8.7	90.7	1.8	10.7	-0.3	54
86 (92)	AirAsia X	Malaysia	15,857	16.6	19,309	19.0	82.1	-1.7	3.2	22.5	17
87 (82)	Virgin America	USA	15,791	-1.0	19,699	-2.2	80.2	1.0	6.3	1.8	53
88 (91)	Shandong Airlines	China	15,581	14.4	20,104	15.8	77.5	-1.0	14.0	12.1	73
89 (86)	Monarch Airlines	UK	15,281	2.9	17,953	3.5	85.1	-0.5	6.8	8.3	42
90 (88)	Spring Airlines est1	China	15,000	7.5	16,000	8.0	94.0	-0.1	10.0	10.0	41
91 (87)	Aer Lingus	Ireland	14,807	2.0	18,898	1.1	78.4	0.7	9.6	-0.3	46
92 (84)	Envoy	USA	14,620	-5.5	19,377	-5.4	75.5	-0.1	17.8	-5.2	224
93 (97)	Volaris	Mexico	14,486	17.4	17,536	17.9	82.6	-0.3	8.9	20.7	48
94 (93)	S7 Airlines	Russia	14,198	9.0	17,550	7.8	80.9	0.9	7.1	11.6	44
95 (100)	SpiceJet	India	13,458	18.6	18,255	19.2	73.7	-0.4	12.8	16.0	55
96 (123)	Nordwind Airlines	Russia	13,433	60.8	15,353	63.9	87.5	-1.7	3.7	68.7	29
97 (98)	Cebu Pacific Air	Philippines	12,927	12.1	16,207	14.3	79.8	-1.6	14.4	8.3	50
98 (94)	SriLankan Airlines	Sri Lanka	12,811	-1.2	15,781	-1.0	81.2	-0.2	4.2	-1.9	22
99 (105)	Air Arabia	UAE	12,400	15.1	15,270	17.9	80.0	-2.0	6.1	15.1	31
100 (101)	Transavia Airlines	Netherlands	12,254	8.9	14,673	7.4	83.5	1.2	6.5	11.4	37

NOTES: est RPK/ASK/load factor estimated based on full-year passenger data; est1 *Airline Business* estimate;

THE WORLD'S TOP AIRPORTS

The *Airline Business* Top 150 airports passenger ranking, compiled using Airports Council International data, shows passenger growth of 4% in 2013, driven by the strong growth of both the Middle East and Asia-Pacific markets

TOP 50 AIRPORTS: PRELIMINARY PASSENGER RANKING 2013 (1-50) AND INNOVATA FREQUENCY/CAPACITY ANALYSIS (MAY 2014)

Rank 2013	(2012)	City	Airport	Code	Country	Passengers Number (000)	Change	Available seats per week Number (000)	Av change	Seats share by destination Intercont'l	Regional
1	(1)	**Atlanta**	Atlanta Hartsfield Int'l	ATL	USA	94,431	-1.1%	2,321	0.3%	8.9%	91.1%
2	(2)	**Beijing**	Capital	PEK	China	83,712	2.2%	2,242	3.1%	16.3%	83.7%
3	(3)	**London**	Heathrow	LHR	UK	72,368	3.3%	1,979	2.3%	54.4%	45.6%
4	(4)	**Tokyo**	Haneda Int'l	HND	Japan	68,907	3.2%	2,123	3.0%	7.1%	92.9%
5	(5)	**Chicago**	O'Hare International	ORD	USA	66,777	0.2%	1,788	2.5%	13.1%	86.9%
6	(6)	**Los Angeles**	International	LAX	USA	66,668	4.7%	1,875	4.8%	19.8%	80.2%
7	(10)	**Dubai**	International	DXB	UAE	66,432	15.2%	1,637	-5.9%	79.5%	20.5%
8	(7)	**Paris**	Charles de Gaulle	CDG	France	62,053	0.7%	1,596	5.4%	51.2%	48.8%
9	(8)	**Dallas/Fort Worth**	International	DFW	USA	60,471	3.2%	1,537	1.5%	6.5%	93.5%
10	(9)	**Jakarta**	Soekarno Hatta	CGK	Indonesia	60,137	4.1%	1,707	7.4%	10.7%	89.3%
11	(12)	**Hong Kong**	International	HKG	China	59,594	6.3%	1,616	3.8%	48.8%	51.2%
12	(11)	**Frankfurt**	International	FRA	Germany	58,037	0.9%	1,688	5.7%	47.2%	52.8%
13	(15)	**Singapore**	Changi	SIN	Singapore	53,726	5.0%	1,502	3.8%	56.5%	43.5%
14	(16)	**Amsterdam**	Schiphol	AMS	Netherlands	52,569	3.0%	1,288	-1.9%	39.0%	61.0%
15	(13)	**Denver**	International	DEN	USA	52,556	-1.1%	1,451	1.0%	1.5%	98.5%
16	(18)	**Guangzhou**	Baiyun International	CAN	China	52,450	8.6%	1,402	6.6%	14.9%	85.1%
17	(14)	**Bangkok**	Suvarnabhumi	BKK	Thailand	51,363	-3.1%	1,266	-0.3%	61.5%	38.5%
18	(20)	**Istanbul**	Ataturk International	IST	Turkey	51,173	13.4%	1,437	12.7%	43.5%	56.5%
19	(17)	**New York**	JFK	JFK	USA	50,424	2.3%	1,375	11.5%	50.8%	49.2%
20	(27)	**Kuala Lumpur**	International	KUL	Malaysia	47,498	19.1%	1,331	10.0%	37.7%	62.3%
21	(21)	**Shanghai**	Pudong	PVG	China	47,190	5.1 %	1,366	10.5%	25.7%	74.3%
22	(22)	**San Francisco**	International	SFO	USA	44,946	1.2%	1,270	2.8%	17.2%	82.8%
23	(23)	**Charlotte**	Douglas	CLT	USA	43,457	5.4%	1,092	3.7%	6.4%	93.6%
24	(29)	**Seoul**	Incheon International	ICN	South Korea	41,680	6.5%	1,083	4.1%	51.2%	48.8%
25	(24)	**Las Vegas**	McCarran	LAS	USA	40,933	0.3%	1,278	-0.6%	3.7%	96.3%
26	(28)	**Miami**	International	MIA	USA	40,563	2.8%	964	1.1%	47.1%	52.9%
27	(25)	**Phoenix**	Sky Harbor	PHX	USA	40,342	-0.2%	1,176	0.1%	1.1%	98.9%
28	(26)	**Houston**	George Bush	IAH	USA	39,799	-0.2%	1,045	1.7%	14.1%	85.9%
29	(19)	**Madrid**	Barajas	MAD	Spain	39,718	-12.1%	1,069	5.8%	28.7%	71.3%
30	(30)	**Munich**	International	MUC	Germany	38,673	0.8%	1,126	3.0%	27.5%	72.5%
31	(31)	**Sydney**	Kingsford Smith	SYD	Australia	38,254	2.4%	984	-0.4%	28.5%	71.5%
32	(37)	**Delhi**	Indira Gandhi Int'l	DEL	India	36,712	7.3%	1,206	4.1%	23.5%	76.5%
33	(43)	**Sao Paulo**	Guarulhos Int'l	GRU	Brazil	36,461	12.3 %	1,023	7.9%	23.0%	77.0%
34	(32)	**Rome**	Fiumicino	FCO	Italy	36,166	-2.2%	998	3.9%	29.0%	71.0%
35	(35)	**Toronto**	Pearson International	YYZ	Canada	36,109	3.4 %	930	3.5%	28.4%	71.6%
36	(39)	**Shanghai**	Hongqiao Int'l	SHA	China	35,600	5.2 %	997	16.2%	0.0%	100.0%
37	(36)	**London**	Gatwick	LGW	UK	35,463	3.6%	936	8.8%	21.8%	78.2%
38	(42)	**Tokyo**	Narita Int'l	NRT	Japan	35,315	7.5 %	912	0.2%	54.5%	45.5%
39	(34)	**Barcelona**	El Prat	BCN	Spain	35,197	0.2 %	987	6.8%	15.6%	84.4%
40	(38)	**Newark**	Liberty International	EWR	USA	35,016	2.9 %	926	-6.9%	27.3%	72.7%
41	(40)	**Seattle Tacoma**	International	SEA	USA	34,777	4.7 %	959	3.2%	7.6%	92.4%
42	(33)	**Orlando**	International	MCO	USA	34,769	-1.5%	982	0.2%	9.7%	90.3%
43	(41)	**Minneapolis-St. Paul**	International	MSP	USA	33,892	2.2 %	885	-1.5%	3.6%	96.4%
44	(46)	**Chengdu**	Shuangliu Int'l	CTU	China	33,446	5.9 %	915	10.1%	4.4%	95.6%
45	(45)	**Manila**	Ninoy Aquino Int'l	MNL	Philippines	32,857	3.1 %	918	4.2%	35.7%	64.3%
46	(44)	**Detroit**	Wayne County	DTW	USA	32,390	0.5 %	862	0.2%	8.3%	91.7%
47	(49)	**Shenzhen**	Baoan International	SZX	China	32,268	9.1 %	929	8.7%	2.5%	97.5%
48	(48)	**Mumbai**	International	BOM	India	31,959	6.4 %	1,051	3.1%	25.9%	74.1%
49	(50)	**Mexico City**	Benito Juarez Int'l	MEX	Mexico	31,535	6.9 %	859	6.2%	14.5%	85.5%
50	(53)	**Moscow**	Domodedovo Int'l	DME	Russia	30,851	9.2 %	709	10.8%	62.1%	37.9%

Frequencies per week		Average seats per flight		Proportion of flights/frequencies by three leading carriers					
Number	Change	Number	Change	Carrier 1		Carrier 2		Carrier 3	
17,548	-4.4%	132	4.9%	Delta Air Lines	59.7%	ExpressJet Airlines	18.4%	AirTran Airways	8.6%
11,724	2.6%	191	0.5%	Air China	40.0%	China Southern Airlines	14.9%	China Eastern Airlines	14.0%
9,620	1.4%	206	0.8%	British Airways	51.1%	Aer Lingus	5.3%	Lufthansa	3.6%
9,118	8.0%	233	-4.6%	All Nippon Airways	32.6%	Japan Airlines	18.0%	JAL Express	13.8%
18,130	-0.7%	99	3.2 %	American Eagle	17.3%	United Airlines	15.3%	ExpressJet Airlines	13.9%
12,836	3.8%	146	1.0%	SkyWest Airlines	22.2%	Southwest Airlines	12.9%	United Airlines	12.6%
5,640	-15.7%	290	11.6%	Emirates	50.5%	Flydubai	11.7%	Kish Air	2.8%
8,952	2.9%	178	2.5%	Air France	43.1%	EasyJet	7.4%	Aerienne Europeene	7.4%
13,260	-1.9%	116	3.5%	American Airlines	54.2%	American Eagle	25.3%	ExpressJet Airlines	5.1%
8,916	7.1%	191	0.3%	Lion Air	32.1%	Garuda Indonesia	30.2%	Sriwijaya Air	10.5%
6,548	4.0%	247	-0.2%	Cathay Pacific Airways	25.7%	Dragonair	17.5%	Hong Kong Airlines	8.9%
9,360	2.7%	180	3.0%	Lufthansa	57.1%	Lufthansa CityLine	9.0%	Tyrolean Airways	2.2%
6,738	3.5%	223	0.3%	Singapore Airlines	24.6%	Tiger Airways	11.7%	Silkair	11.2%
8,430	2.4%	153	-4.2%	KLM	30.7%	KLM Cityhopper	24.6%	EasyJet	6.7%
12,546	-3.3%	116	4.4%	Southwest Airlines	20.0%	SkyWest Airlines	19.2%	United Airlines	15.4%
8,352	6.1%	168	0.4%	China Southern Airlines	50.7%	China Eastern Airlines	9.1%	Shenzhen Airlines	8.0%
5,586	3.5 %	227	-3.7%	Thai Airways	33.0%	Bangkok Airways	18.1%	Cathay Pacific Airways	2.7%
8,234	10.9%	174	1.7%	Turkish Airlines	74.9%	Onur Air	5.3%	Atlasjet Airlines	4.2%
8,410	10.7%	163	0.6%	JetBlue Airways	25.9%	Delta Air Lines	17.7%	American Airlines	10.5%
6,688	9.1%	199	0.8%	Malaysia Airlines	35.6%	AirAsia	35.0%	AirAsia X	4.3%
7,344	9.5%	186	0.9%	China Eastern Airlines	31.3%	Shanghai Airlines	10.3%	China Southern Airlines	9.2%
8,972	1.4%	142	1.4%	United Airlines	30.5%	SkyWest Airlines	22.9%	Virgin America	8.8%
10,340	-1.8%	106	5.6%	US Airways	39.7%	PSA Airlines	16.2%	Mesa Airlines	15.0%
4,698	4.7%	231	-0.6%	Korean Air Lines	30.7%	Asiana Airlines	24.9%	China Southern Airlines	4.5%
8,484	-0.9%	151	0.3%	Southwest Airlines	44.9%	United Airlines	7.9%	Delta Air Lines	6.9%
6,364	0.3%	152	0.8%	American Airlines	57.6%	American Eagle	16.1%	Delta Air Lines	5.5%
8,716	-2.6%	135	2.8%	US Airways	33.9%	Southwest Airlines	31.1%	SkyWest Airlines	12.3%
10,174	1.3%	103	0.4%	ExpressJet Airlines	41.3%	United Airlines	34.4%	SkyWest Airlines	6.2%
6,430	4.4%	166	1.4%	Iberia	23.0%	Air Nostrum	14.4%	Air Europa	12.8%
7,372	0.0%	153	3.0%	Lufthansa	32.8%	Lufthansa CityLine	25.9%	Air Berlin	8.7%
5,830	-2.2%	169	1.9%	Qantas Airways	35.4%	Virgin Australia	21.0%	Jetstar Airways	13.7%
6,808	4.0%	177	0.1%	Air India	21.7%	Indigo	21.5%	Jet Airways	18.0%
5,814	7.5%	176	0.4%	Gol Transportes Aereos	31.0%	TAM	29.7%	Azul	10.0%
6,142	2.3%	163	1.6%	Alitalia	37.1%	EasyJet	7.8%	Alitalia CityLiner	7.5%
8,000	0.3%	116	3.1%	Air Canada	28.5%	Jazz Air	20.6%	Westjet	16.1%
5,608	14.0%	178	1.9%	China Eastern Airlines	30.6%	Shanghai Airlines	20.3%	Spring Airlines	9.2%
5,248	5.2%	178	3.4%	EasyJet	46.3%	British Airways	17.5%	Norwegian	7.4%
3,976	3.1%	229	-2.8%	Japan Airlines	16.5%	All Nippon Airways	13.3%	Jetstar Japan	9.1%
5,638	5.5%	175	1.3%	Vueling Airlines	38.4%	Ryanair	11.7%	EasyJet	7.8%
7,530	-13.5%	123	7.6%	United Airlines	37.1%	ExpressJet Airlines	22.3%	Republic Airlines	5.9%
7,180	0.5%	134	2.7%	Alaska Airlines	30.8%	Horizon Air	24.5%	Delta Air Lines	7.7%
6,446	-1.1%	152	1.3%	Southwest Airlines	28.9%	JetBlue Airways	15.6%	Delta Air Lines	12.5%
8,110	-5.8%	109	4.6%	Delta Air Lines	31.3%	Endeavor Air	22.8%	SkyWest Airlines	11.1%
5,642	10.4%	162	-0.2%	Air China	29.9%	Sichuan Airlines	20.1%	China Eastern Airlines	11.2%
4,918	3.2%	187	0.9%	Cebu Pacific	31.0%	PAL Express	30.3%	Philippine Airlines	11.2%
8,296	-6.5%	104	7.1%	Delta Air Lines	30.1%	Endeavor Air	22.7%	ExpressJet Airlines	16.3%
5,572	7.1%	167	1.5%	Shenzhen Airlines	29.4%	China Southern Airlines	24.2%	Hainan Airlines	10.4%
5,842	3.2%	180	-0.2%	Jet Airways	25.3%	Indigo	19.6%	Air India	17.5%
7,078	6.1%	121	0.1%	Aerolitoral	25.8%	InterJet	20.5%	Aeromexico	19.8%
4,790	12.7%	148	-1.7%	S7 Airlines	23.9%	Transaero Airlines	12.2%	Ural Airlines	6.5%

CHICAGO AIRPORT ANALYSIS

Chicago airports continue to grow as global crossroads

Chicago O'Hare International and Midway International airports have grown in 2014, with international capacity increasing at nearly double the clip of domestic capacity.

Capacity to Asia, the Caribbean, Europe, Latin America and the Middle East increased 8.4% to 491,378 seats primarily at O'Hare in September 2014 compared to a year earlier, Innovata FlightMaps Analytics data shows. Midway is primarily a domestic airport with select international flights to Canada, the Caribbean and Mexico.

North American capacity at both airports grew just 4.7% to 4.23 million seats in September versus the same month in 2013, Innovata shows. This was also dominated by O'Hare, which is more than three-times larger than Midway.

| CHICAGO O'HARE AND MIDWAY AIRPORTS SEAT CAPACITY			
	Sept 2014	**Sept 2013**	**% change**
North America	4,229,164	4,038,117	4.7
Rest of the World	491,378	453,337	8.4
TOTAL	**4,720,542**	**4,491,454**	**5.1**

Source: Innovata FlightMaps Analytics

The growth was driven by a number of route and frequency additions.Emirates launched new daily nonstop service to O'Hare from Dubai on a Boeing 777-200 on 5 August, becoming the last of the major Gulf carriers to land in Chicago.

"We truly welcome this connection that will deepen the ties between two of the world's busiest airports in terms of commercial travel, with a combined traffic flow of approximately 133 million passengers in 2013," says Rosemarie Andolino, commissioner of the Chicago Department of Aviation, in a statement on the new flight.

Other significant additions include two more weekly frequencies for daily service to Vienna on Austrian Airlines in May, three more weekly frequencies for a total of 10 to Hong Kong on Cathay Pacific Airways in August, and British Airways upgauged one of its two daily London Heathrow flights to a Boeing 747-400 with up to 345 seats from a Boeing 777-200 with up to 275 seats, Innovata shows.

Hometown United Airlines added new nonstops to Aruba, Edinburgh, Punta Cana and Shannon from O'Hare as it
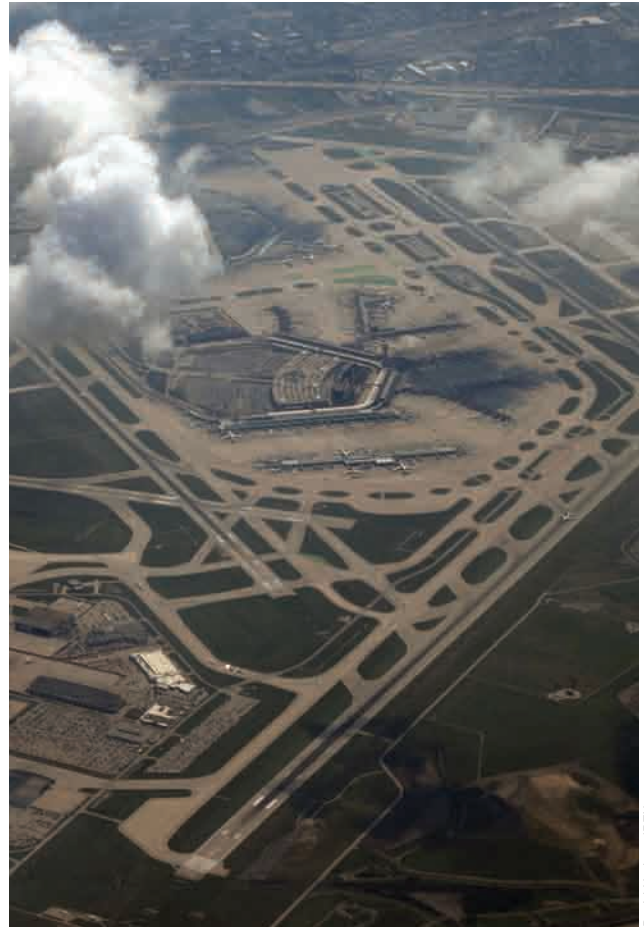
David Hodges/REX

continued to streamline and optimise its route network during the year. It also discontinued service to Thunder Bay, Ontario.

Overall, the two Chicago airports saw a 5.1% increase to 4.72 million seats in September compared to a year earlier. O'Hare dominated this growth with a 6.6% increase in seats while Midway posted a modest 0.4% increase.

Both airports have seen modest changes to their route networks, as carriers added and dropped routes, and American Airlines, Southwest Airlines and United continue to optimise their respective hubs in the city.

O'HARE
San Salvador, Atlantic City, San Juan, Punta Cana and Cancun led the growth in seat capacity on existing routes from Chicago O'Hare in September, Innovata shows.

San Salvador and Cancun saw frequency increases. Avianca upped the number of weekly flights to San Salvador when it took over flights from Taca in November 2013 and United tripled its weekly flights to Cancun during the past year, Innovata shows.

Airlines added new service to Atlantic City, Punta Cana and San Juan. United began a new nonstop to Atlantic City and Punta Cana during the year, and JetBlue Airways and United both added new service to San Juanin November 2013.

O'Hare saw a net addition of 10 routes after five were discontinued in September compared to a year earlier. New destinations include Aruba (United), Bangor (United), Dubai (Emirates), Oakland (Spirit Airlines) andShannon (United). Service was discontinued to Grand Cayman, Guatemala City, Kitchener, Thunder Bay and Watertown.

Routes to Albuquerque, El Paso, Marquette (Wisconsin), Norfolk and Toledo saw the biggest capacity cuts during the year ending in September, Innovata shows. Frequency was reduced or aircraft downgauged to Albuquerque, Marquette, Norfolk and Toledo by either American or United.

Capacity to El Paso fell after United discontinued the route, data shows. American maintained its service levels from September 2013 to this September.

The fastest growing airlines at O'Hare have little correlation to the routes that saw the most capacity change. Frontier Airlines leads the increases in seat capacity with a remarkable 202% jump this September. However, the ultra low-cost carrier's growth is off a very low base of just one or two flights per week that increases to seven or eight per week with six-times weekly service to Washington Dulles from 15 September.

Air Berlin, Austrian, Cathay Pacific and Spirit also posted greater than 25% increases in seat capacity at O'Hare in September, Innovata shows. This is not including airlines like Avianca or Emirates that had no service to the airport a year earlier.

United maintained its position as the largest carrier at the airport with a 45.6% market share followed by American with a 33.7% share in September.

MIDWAY
Growth at Midway on Chicago's south side was very much a domestic affair in September. Cincinnati, Manistee (Michigan), Memphis, Salt Lake Cityand Washington National saw the largest seat capacity increases whileBranson (Missouri), Minneapolis-St. Paul, St. Louis, Spokane and Tucson the largest decreases, Innovata shows.

Public Charters drove the growth to Cincinnati and Manistee. It launched five-times weekly service to Cincinnati on 30-seat Dornier 328Jets under the Ultimate Air Shuttle brand in July and increased weekly frequencies by a third to Manistee on 19-seat BAe Jetstream 32s under the Corporate Flight Management brand since last September.

Schedule changes at Midway's dominant airline Southwest drove the capacity increases to Memphis, Salt Lake City and Washington National. The Dallas-based carrier launched new twice-daily service to Memphis in November 2013 and six-time daily service to Washington National in July, with the latter's schedule increasing to nine daily at the end of September. It added about one daily flight to Salt Lake City for up to three during the year.

Southwest was also behind the capacity decreases to Branson, St. Louis, Spokane and Tucson. The airline discontinued service to Branson in June, ended its seasonal service to Spokane earlier than last year on 8 September, and simply decreased frequency to both St. Louis and Tucson, Innovata shows.

Public charter airline Buzz Airways replaced Southwest on the Bransonroute with flights on 30-seat BAe Jetstream 41 aircraft. Southwest operated the route with Boeing 737 aircraft.

Sun Country Airlines cut its schedule between Midway and Minneapolis-St. Paul by more than half, driving the majority of the capacity decrease on the route. Delta Air Lines also decreased frequency slightly while Southwest slightly increased frequency, Innovata shows.

Midway airport lost nonstop service to Akron/Canton, Harrisburg, Jackson, Knoxville and Mexico City during the year ending in September. Most of these were due to network changes at Southwest, while Volaris moved its Mexico City flight to O'Hare in January.

Southwest increased its share of the market at Midway with a 2.5 percentage point increase to 87.8% of seats in September, Innovata shows. However, the majority of this came from a comparable decrease in seats on its subsidiary AirTran Airways, which will be completely integrated into Southwest by December.

AIRPORT ANALYSIS BY REGION

Differing economic pressure, markets dynamics and airline business models means that despite a decade of traffic growth, airport fortunes over the last ten years differ widely.

In many cases traffic growth has been driven by economic development, particular in emerging markets. In others, airline consolidation and the success – or otherwise – of their strategies explain why some airports have prospered while neighbours have withered.

In the established markets of North America and Europe there is a familiar feel to the airports leading the way in passenger numbers.

For example Delta's Atlanta Hartsfield home remains the world's largest airport, handling 94 million passengers in 2013. This is over 10 million more than a decade ago.

TOP 10 AIRPORTS - NORTH AMERICA (2013)

Rank	City	Airport	Country	Passengers Number (000)
1	Atlanta	Atlanta Hartsfield Int'l	USA	94,431
2	Chicago	O'Hare International	USA	66,777
3	Los Angeles	International	USA	66,668
4	Dallas/Fort Worth	International	USA	60,471
5	Denver	International	USA	52,556
6	New York	JFK	USA	50,424
7	San Francisco	International	USA	44,946
8	Charlotte	Douglas	USA	43,457
9	Las Vegas	McCarran	USA	40,933
10	Miami	International	USA	40,563

Source: Airline Business

Some of the most rapid growth over the last ten years has been seen at Denver, New York JFK, San Francisco, Charlotte and Miami – all of which have lifted passenger number in excess of 10 million.

US carriers' well documented tight grip on capacity is evident by the relatively low-growth rates in seat capacity among airports in the region – analysis of weekly Innovata schedules data from September for airports with more than 100,000 seats shows only Austin with double-digit growth.

Some of the fastest seat capacity growth among US airports over the last year has been at big hubs like New York JFK, Dallas/Fort Worth and Chicago O'Hare, as US carriers have shed many of their smaller hubs. While percentage growth rates may be relatively low compared with other regions, in

NORTH AMERICA AIRPORTS - SEAT CAPACITY GROWTH

Airport	Sept 2014	Sept 2013	Difference	Change
Austin, US	127,792	115,600	12,192	10.5%
Seattle/Tacoma, US	444,600	408,989	35,611	8.7%
Fort Lauderdale, US	222,176	205,793	16,383	8.0%
New York-JFK, US	639,537	594,289	45,248	7.6%
Toronto, CA	467,819	438,111	29,708	6.8%
Montreal-PET, CA	188,230	177,859	10,371	5.8%
Dallas/Fort Worth, US	742,217	701,518	40,699	5.8%
Chicago-O'Hare, US	854,475	808,791	45,684	5.6%
Calgary, CA	182,727	173,149	9,578	5.5%
Houston-Intercontinental, TX, US	456,163	433,806	22,357	5.2%

Source: Innovata Note: Data is based on one week of scheduled data (September 2014 against September 2013) for airports with a minimum of 100,000 seats/week

absolute times it still represent significant growth.

In Europe the big hubs – linked to Air France, British Airways and Lufthansa – continue to thrive and lead passenger volumes. But there has been plenty of movement on the European landscape, in part driven by fast expansion in Turkey and Russia.

Passengers handled at Istanbul's Ataturk airport have roughly trebled since 2004, to 51 million last year. Couple this with the trebling of passenger numbers in the past five years alone to 18 million at Istanbul's Sabiha Gokcen airport, favoured by low-cost operators, and it is small wonder that plans are under way for a major new hub to meet the Turkish city's growth in demand.

The spread of low-cost carriers has been a similar driver of passenger development among European airports and that is evident in the strong growth, for example, at Barcelona's El Prat airport, where Ryanair and Vueling have both grown.

EUROPE AIRPORTS - SEAT CAPACITY GROWTH

Airport	Sept 2014	Sept 2013	Difference	Change
Athens, GR	229,334	183,954	45,380	24.7%
Sabiha Gokcen, TR	317,513	259,649	57,864	22.3%
Brussels, BE	307,649	260,153	47,496	18.3%
Catania, IT	104,759	90,013	14,746	16.4%
Lisbon, PT	242,605	214,759	27,846	13.0%
Moscow-Domodedovo, RU	429,265	382,421	46,844	12.2%
Bucharest, RO	117,008	104,653	12,355	11.8%
London-Luton, GB	142,227	128,217	14,010	10.9%
Ibiza, ES	135,021	122,259	12,762	10.4%
London-Stansted, GB	255,392	232,032	23,360	10.1%

Source: Innovata Note: Data is based on one week of scheduled data (September 2014 against September 2013) for airports with a minimum of 100,000 seats/week

TOP 15 AIRPORT TRAFFIC FOR EUROPE (2004-2013)

Source: Airline Business
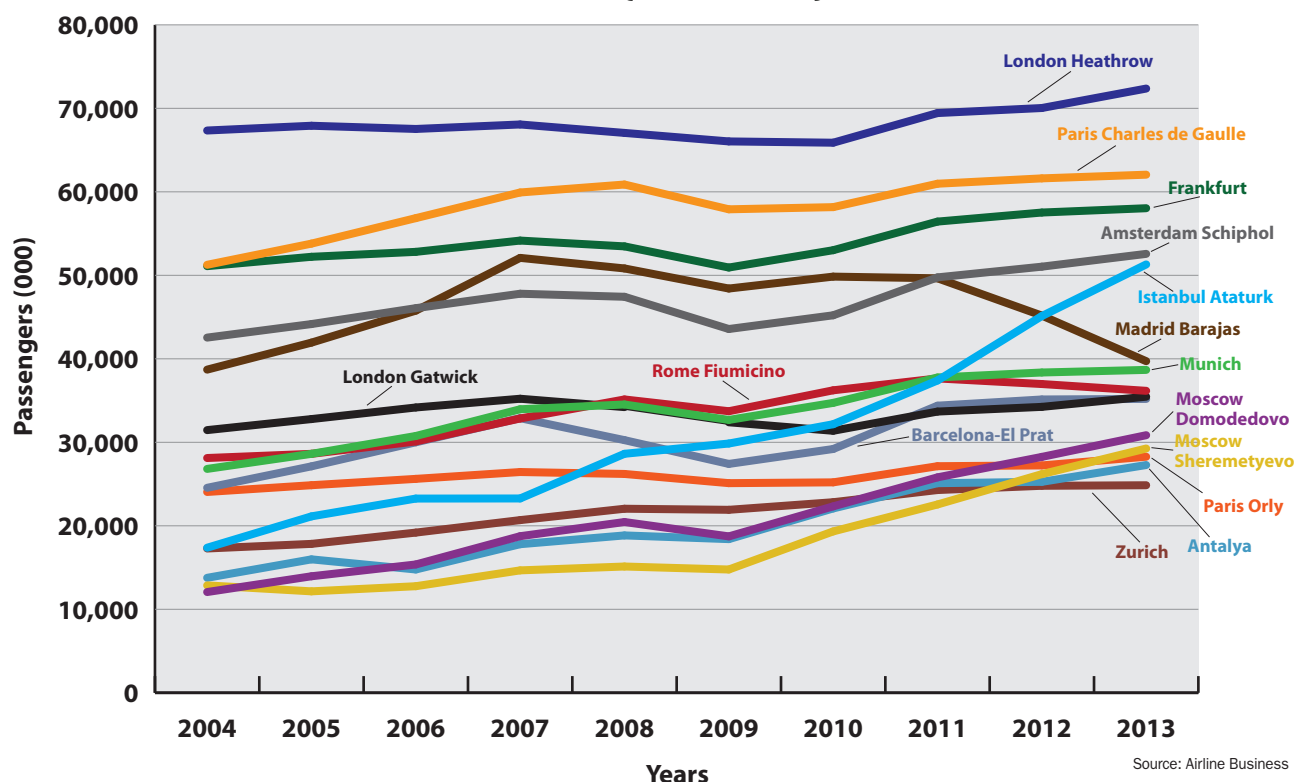
Innovata capacity data for September shows budget sector carrier growth contributing to overall growth at virtually all of the 10 airports growing at the fastest rate. For example Athens, Lisbon and Brussels, all among the fastest growing, have seen low-cost carrier expansion – notably from Ryanair.

Growth, albeit from a lower starting point, has been more eye-catching in emerging markets. Nowhere more so than in China and Beijing Capital airport's stellar rise to become the world's second largest hub.

Passenger numbers have jumped from just under 35 million over the last 10 years in reaching 83.7 million in 2013. This growth of nearly 50 million passengers over the last decade compares with the 6.5 million additional passengers at the Asia-Pacific region's second biggest airport, Tokyo Haneda.

But growth is evident across Chinese airports and Asia-Pacific more widely. Passenger numbers have more than doubled at both Guangzhou and Shanghai Pudong airports over the last ten years in reaching 52.5 million and 47.2 million respectively.

Growth across Chinese airports is further evidenced by the extra capacity being added by airlines this year. Innovata

TOP 10 AIRPORTS - ASIA-PACIFIC (2013)

Rank	City	Airport	Country	Passengers Number (000)
1	Beijing	Capital	China	83,712
2	Tokyo	International	Japan	68,907
3	Jakarta	Soekarno Hatta	Indonesia	60,137
4	Hong Kong	International	Hong Kong	59,594
5	Singapore	Changi	Singapore	53,726
6	Guangzhou	Baiyun International	China	52,450
7	Bangkok	Suvarnabhumi	Thailand	51,363
8	Kuala Lumpur	International	Malaysia	47,498
9	Shanghai	Pudong	China	47,190
10	Seoul	Incheon International	South Korea	41,680

Source: Airline Business

ASIA-PACIFIC AIRPORTS - SEAT CAPACITY GROWTH

Airport	Sept 2014	Sept 2013	Difference	Change
Bangkok, TH	245,187	175,575	69,612	39.6%
Sanya, CN	139,242	109,083	30,159	27.6%
Jeju, KR	251,702	206,789	44,913	21.7%
Guiyang, CN	162,549	136,376	26,173	19.2%
Bengaluru, IN	201,038	169,889	31,149	18.3%
Tianjin, CN	147,649	126,454	21,195	16.8%
Changsha, CN	235,245	203,751	31,494	15.5%
Haikou, CN	128,451	111,347	17,104	15.4%
Harbin, P. R. China, CN	144,129	124,975	19,154	15.3%
Xi'an, CN	399,685	348,460	51,225	14.7%

Source: Innovata Note: Data is based on one week of scheduled data (September 2014 against September 2013) for airports with a minimum of 100,000 seats/week

TOP 10 AIRPORT TRAFFIC FOR ASIA-PACIFIC (2004-2013)

Source: Airline Business
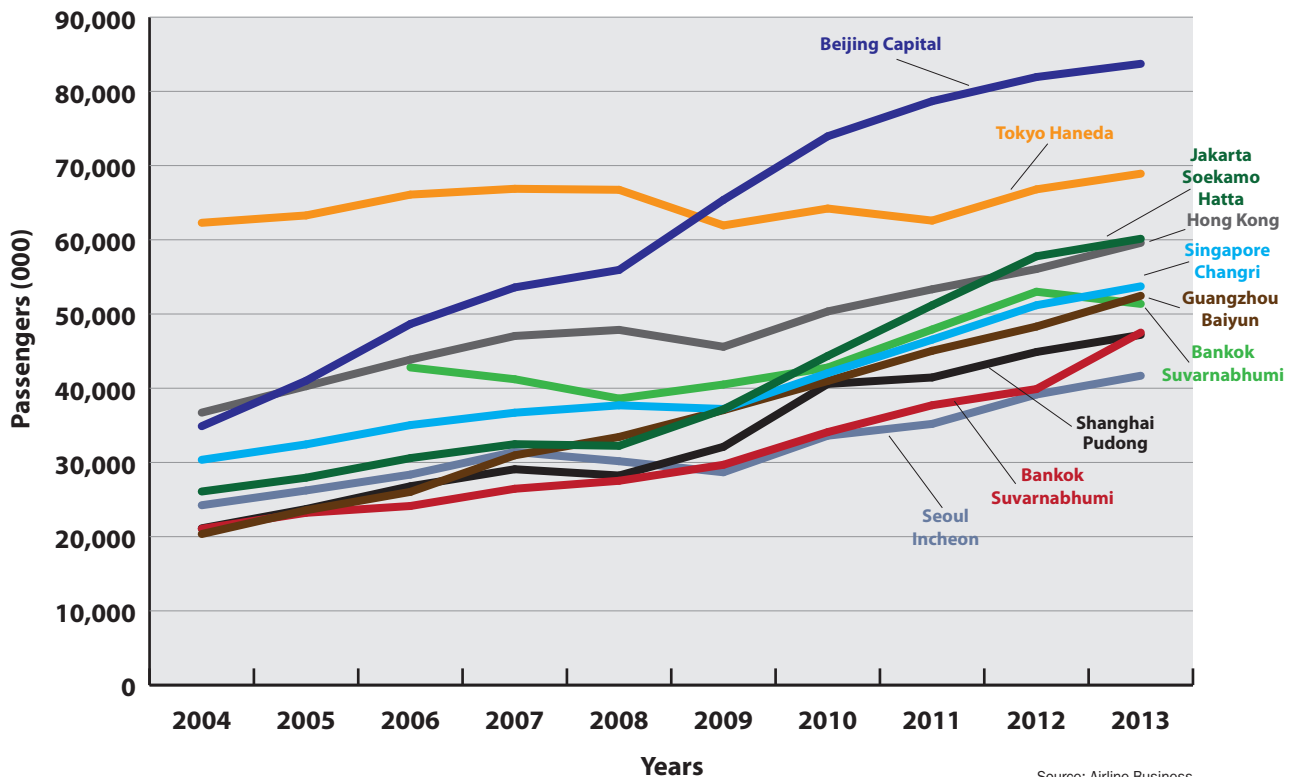
schedules data for September shows seven of the ten fastest growing airports in Asia-Pacific are in China.

Elsewhere the ambitious expansion plans of the big three Gulf carriers have been matched by the growth at their respective hubs.

Emirates' Dubai hub is the obvious example. Passenger traffic more than trebled over the last decade to reach over 66 million last year.

Passenger numbers at Qatar's Doha base, at which the new Hamad International gateway opened earlier this year, and Etihad Airways home Abu Dhabi, have also more than trebled over the last ten years, albeit off a smaller base number.

In another growth area, Latin America, the expansion in air travel in the region is clear. Passenger numbers at Brazilian airports Sao Paulo Guarulhos – the region's busiest in 2013 with 36 million – and Rio de Janeiro both nearly trebled over the last 10 years.

TOP 10 AIRPORTS - MIDDLE EAST (2013)				
Rank	City	Airport	Country	Passengers Number (000)
1	Dubai	International	UAE	66,432
2	Doha	International	Qatar	23,389
3	Jeddah	King Abdulaziz Int'l	Saudi Arabia	22,244
4	Riyadh	King Khalid Int'l	Saudi Arabia	19,106
5	Abu Dhabi	International	UAE	16,526
6	Tel Aviv	Ben Gurion Int'l	Israel	14,228
7	Tehran	Mehrabad International	Iran	12,702
8	Kuwait	International	Kuwait	9,387
9	Sharjah	International	UAE	8,515
10	Muscat	International	Oman	8,311

Source: Airline Business

TOP 10 AIRPORTS - LATIN AMERICA (2013)				
Rank	City	Airport	Country	Passengers Number (000)
1	Sao Paulo	Guarulhos Int'l	Brazil	36,461
2	Mexico City	Benito Juarez Int'l	Mexico	31,535
3	Bogota	El Dorado Int'l	Colombia	25,035
4	Rio de Janeiro	International	Brazil	17,257
5	Sao Paulo	Congonhas	Brazil	17,082
6	Brasilia	International	Brazil	16,560
7	Cancun	International	Mexico	16,037
8	Santiago	International	Chile	15,313
9	Lima	Jorge Chavez Int'l	Peru	14,909
10	Caracas	Simon Bolivar	Venezuela	12,180

Source: Airline Business

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ASIA-PACIFIC ANALYSIS

Asia-Pacific looks North as market dynamics shift

Joanna Lu, Hong Kong-based analyst from Flightglobal consultancy Ascend, considers the changing market dynamics driving the extra capacity in the Asia-Pacific sector.

Low-cost carriers are helping to drive increased traffic flows between North and Southeast Asia even as the dynamics behind the region's continued fast growth are shifting.

Asia-Pacific airlines, along with Latin America and Middle East airlines, have led passenger traffic growth over the last five years. But while growth is expected to continue this year, a recent study by Flightglobal consultancy Ascend indicates that there are major changes afoot in Asia-Pacific's market dynamics.

While North Asia shows momentum in connecting Asia-Pacific with other continents, connectivity is also increasing between the Southeast Asian market and the North. This in turn has impacted the airport sector, making it the right time for both airlines and airports in Asia-Pacific to explore new opportunities.

INTERCONTINENTAL: NORTH ASIA DRIVES MARKET
In July 2014, the total flights on intercontinental routes to and from the Asia-Pacific increased by 3.5% and by 4.3% in terms of available seats. The growth was highlighted by those already-busy routes between key hubs in North Asia and Europe, USA and the Middle East, where more than five daily one-way routes are operated.

China, India and Japan continue to grow new intercontinental routes the fastest. Tokyo Haneda has benefited from the increased international slots and handled nearly 2,500 outbound flights overseas in July 2014. This is an increase of 47.5% year on year. This has included some foreign carriers that have shifted their capacity from Tokyo's Narita airport to Haneda to leverage domestic traffic volumes at the latter.

China's secondary airports, such as Chengdu, Hangzhou, Changsha and Xi'an kept up quickly this year and showed great ambition in expanding their networks to Europe and the USA.

India's connections to the United Arab Emirates has solidified

after the two countries reached a new bilateral agreement in April last year, helping to fuel increased co-operation – notably Etihad's tie-up with Jet Airways – between airlines from the two countries. This year will see another 12,800 weekly seats added to the market and a further 12,870 will follow next year.

Capacity between Dubai and Asia was affected by Emirates' temporary flight cutback due to runway construction in Dubai. In effectively utilising the reduced capacity, Emirates shifted some services in Southeast Asia to North Asia during the construction period.

ASIA-PACIFIC'S NEW INTERCONTINENTAL ROUTES IN 2014					
Country		**Airport**		**July 2014**	
Origin	**Destination**	**Origin**	**Destination**	**Flights**	**Seats**
Japan	Germany	HND	MUC	62	14,673
	Germany	NRT	DUS	31	5,239
	Canada	HND	YVR	31	6,448
	Qatar	HND	DOH	30	7,620
	Canada	HND	YYZ	30	8,886
China	USA	PVG	DFW	31	7,657
	Ethiopia	PVG	ADD	30	8,070
	USA	PEK	HNL	26	6,903
	USA	PEK	BOS	23	4,880
	Russia	PEK	VKO	23	9,459
	UK	CTU	LHR	22	4,708
	Qatar	HGH	DOH	18	5,400
	Germany	CSX	FRA	14	3,038
	Kenya	CAN	NBO	14	5.600
	USA	CTU	SFO	13	2,847
	Russia	XIY	SVO	13	3,362
	Qatar	CTU	DOH	13	3,380
Hong Kong	USA	HKG	DFW	31	9,610
	USA	HKG	SEA	26	6,084
India	UAE	IXE	SHJ	42	7,508
	UAE	JAI	AUH	31	4,216
	UAE	PNQ	SHJ	27	5,076
	Bahrain	TRV	BAH	22	3,718
	UAE	ATQ	SHJ	20	3,720
	UAE	TRZ	SHJ	20	3,720
	UK	DEL	BHX	18	4,608
	Italy	DEL	MXP	14	3,584
	Oman	AMD	MCT	13	2,457
	UAE	IXM	DXB	11	2,079

Source: Innovata

REGIONAL: RESHAPING THE GROWTH

This year, the China-South Korea route moved ahead of China-Hong Kong as the largest country pair in the Asia-Pacific market by seat capacity. This represents growth of 27.5% in the total number of seats between the two countries compared with the same time last year.

The market share by the two countries' operators are comparable, but while Asiana Airlines and Korean Air Lines dominated the services from South Korea, it was more fragmented among their Chinese counterparts. The three major Chinese flag carriers have experienced huge growth in expanding to the South Korean market, where China Southern and Air China lifted nearly 50% of their capacity on this market. Beijing, Shanghai, Guangzhou and secondary markets on the northeast coast of China, such as Qingdao, Yantai, Tianjin, Dalian, all benefited from the extra capacity.

There was significant growth on the China-Taiwan, China-Japan and Taiwan-Japan routes, where total seats increased more than a fifth over the last year. Singapore cut its connections to major markets in Southeast Asia such as Indonesia (-12.7%), Malaysia (-7.7%), Thailand (-6.3%) while raising capacity to Hong Kong (10.9%), Japan (9.8%) and Vietnam (12.6%), indicating its intention of increasing connections to North Asia.

One of the key drivers of Asia-Pacific's recent route development changes has been the LCCs shifting capacities from within Southeast Asia to North Asia. As the region's large LCCs originated in Southeast Asia, they have, to some extent, secured their presence in domestic and short-haul markets. Stepping up their operations in the international market and flying longer routes is a logical next step.

While AirAsia has cut capacity on Malaysian domestic routes and flights to Singapore, it has increased capacity dramatically to Indonesia, Thailand, Cambodia, Vietnam and China.

Jetstar Asia showed its ambition in North Asia through double-digit capacity growth on services to Hangzhou, Shantou and Taipei. The airline has also quickly added capacity to Cambodia, Myanmar and Thailand. However, Jetstar Asia cut 30% of its seat capacity on the Singapore-Kuala Lumpur route in 2014 due to the high frequency provided on that market. Tigerair typically launched many new routes to China, India, Myanmar and Vietnam by cutting capacities provided in Southeast Asia market.

AIRASIA SEAT CAPACITY CHANGES JULY 2014 VS JULY 2013
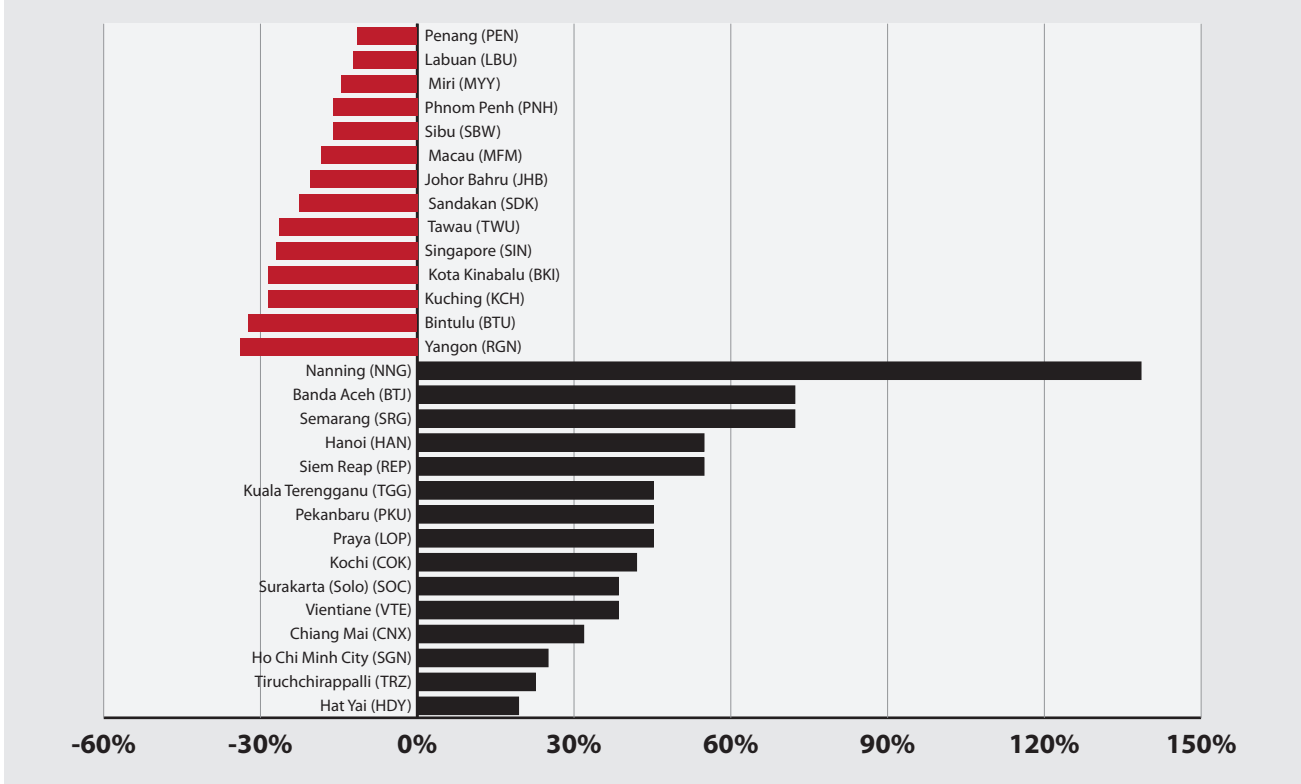
Source: Innovata

AIRPORTS: CHANGING MARKET FOCUS

The shifting route development dynamics have had a major impact on airport development in the region. Bangkok's Don Mueang is one of the beneficiaries. The number of outbound seats from Don Mueang tripled in 2013 compared with 2012 when the airport was reopened. In 2013, the airport had 16.5 million passengers and this is expected to have risen by another 20% in the first half of this year.

Dramatic changes took place on routes between Bangkok and Singapore, with capacity dropping by a fifth on flights between Bangkok Suvarnabhumi and Singapore, but rising nearly 30% from Singapore to Don Mueang in July 2014. While congestion and infrastructure problems at Suvarnabhumi airport created an opportunity for Don Mueang, it is still business demands that are driving airlines' motivation for relocating to Don Mueang airport because of the easier access.

LCCs or smaller operators also have more flexibility in relocation as a result of their smaller operational scale. Analysis shows key LCCs increasingly tend to explore new markets in Asia, especially China, South Korea, Myanmar, Vietnam and Cambodia.

It is foreseeable that Don Mueang may have better coverage from its network perspective. When a city or region's traffic is achieving a level that a single airport is not able to serve, a multiple airports solution has to be put in place. Only then will there be opportunities for the new/secondary airport to leverage the overflow demand. The important work to do is to position the airport's role in the region and their target airlines. Infrastructure has to be the preliminary requirement to leverage the opportunities ahead. Don Mueang has a potential of 30 million passenger capacity and can probably be expanded further. Thus, it has a good starting point.

There are some other airports with outstanding traffic performance this year which are mainly driven by proactive air marketing strategies and the introduction of new routes. China's Chengdu is a good example, after it launched 11 new international routes with access to the key hubs in Europe, USA and Asia.

This will dramatically impact customer choices on departing and arriving in central China. It will be interesting to see how this has impacted the hub competition picture in China, and for hubs close to Chengdu's catchment area, the airport is an important one to watch.

CHENGDU INTERNATIONAL NETWORK
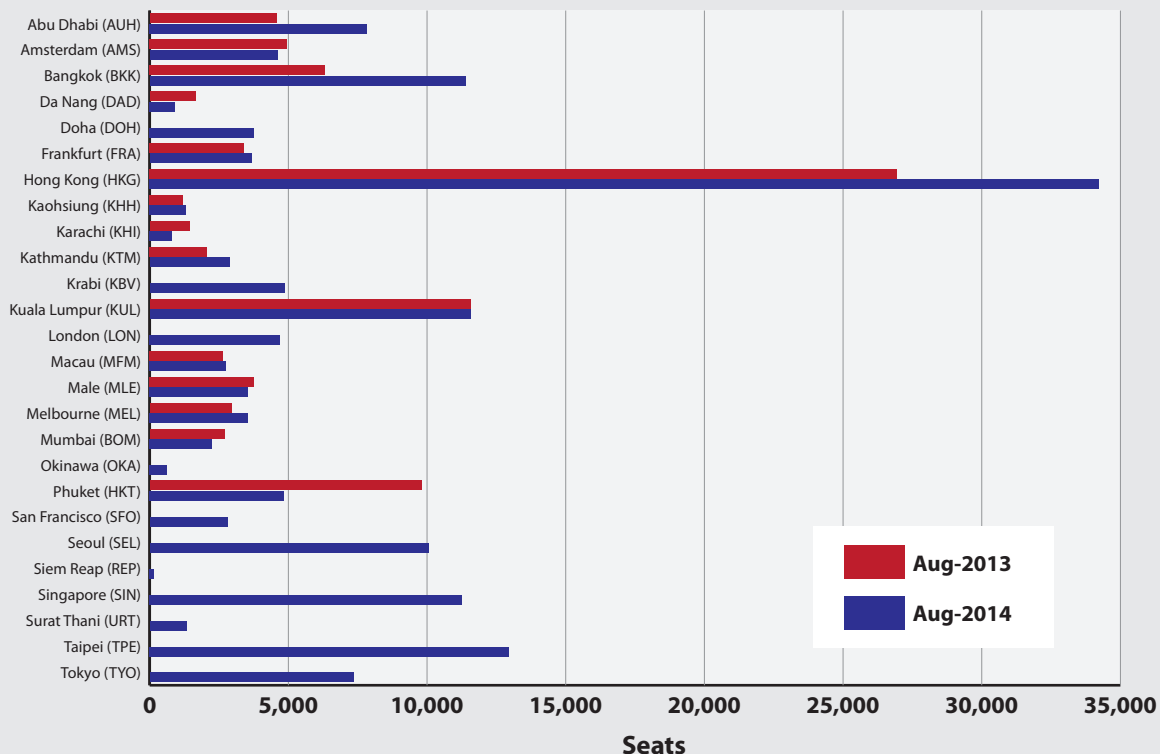
Source: Innovata

FLIGHTMAPS ANALYTICS

FlightMaps Analytics is a map-based analysis tool for route development professionals and is powered by flight frequency and capacity data from the Innovata airline schedules database, together with Flightglobal's aircraft seat database.

It provides access to current, future and historic airline schedules, flight frequency and seat capacity data, allowing you to identify new, ceased and underserved routes, analyse current and potential connections, and plot market share.

You can import your own route information data - so that airport pair, carrier frequency and seat capacity data for new routes can be imported and seamlessly integrated, showing you how market capacity and frequency share would be affected.

Pinpoint global code share opportunities - data can be combined to highlight how airline networks fit together, allowing you to quickly pinpoint global codeshare and interline opportunities.

Fulfil trend analysis - data can be compared across time periods to show changes in routes and capacities year-on-year.

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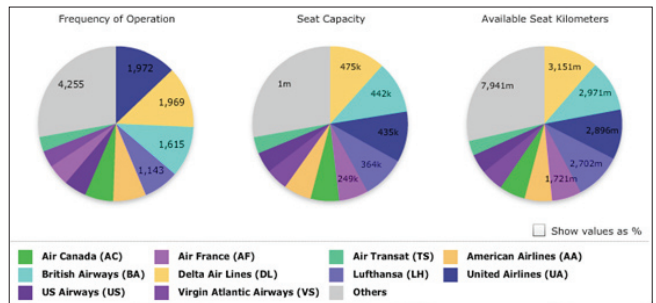
CEASED TRANSATLANTIC ROUTES (SEPT 2014 VS SEPT 2013)

MARKET SHARES SEGMENTED BY ROUTES
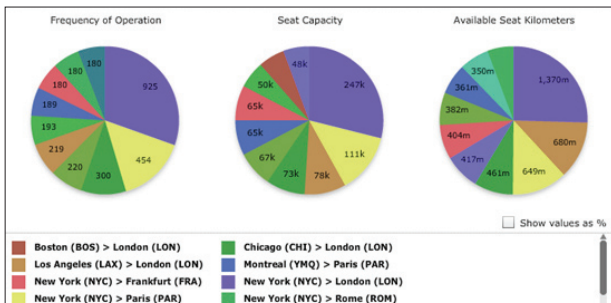
MARKET SHARES SEGMENTED BY CARRIER

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CLOSE SCHEDULE

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FLIGHTS /wk	SEATS /wk	ASKs /wk (km)	DISTANCE (km)
28	6,650	42,234,150	6,351

< WEEK >   Flights based on **01 - 07 Sep 2014**

FLIGHT INFORMATION			DEPARTURE			ARRIVAL			DAYS OF OPERATION							STOPOVER		CODESHARE	EQUIPMENT & SEATS				
AIRLINE	FLIGHT NUMBER	DURATION	AIRPORT	TERMINAL	TIME	AIRPORT	TERMINAL	TIME	MON	TUE	WED	THU	FRI	SAT	SUN	STOPS	STOPOVER	AIRLINE FLIGHT	AIRCRAFT	FIRST	BUSINESS	ECONOMY	TOTAL
AA	46	480	ORD	3	19:00:00	LHR	3	09:00:00	✔	✔	✔	✔	✔	✔	✔	0	-	AY 5788 /BA 1545 /GF 6886 /IB 4188 /LY 8024 /MH 9424 /QR 5199 /US 46	763	0	30	188	218
AA	86	460	ORD	3	17:10:00	LHR	3	06:50:00	✔	✔	✔	✔	✔	✔	✔	0	-	AY 5760 /BA 1543 /GF 6686 /IB 4208 /LY 8045 /QR 5282 /US 86	777	14	40	203	257
AA	90	460	ORD	3	09:05:00	LHR	3	22:45:00	✔	✔	✔	✔	✔	✔	✔	0	-	AY 5752 /BA 1541 /IB 4212 /LY 8047 /QR 5284 /US 90	763	0	30	188	218
AA	98	465	ORD	3	21:40:00	LHR	3	11:25:00	✔	✔	✔	✔	✔	✔	✔	0	-	AY 5754 /BA 1547 /GF 6746 /IB 4216 /LY 8049 /QR 5288 /RJ 7100 /US 98	777	14	40	203	257

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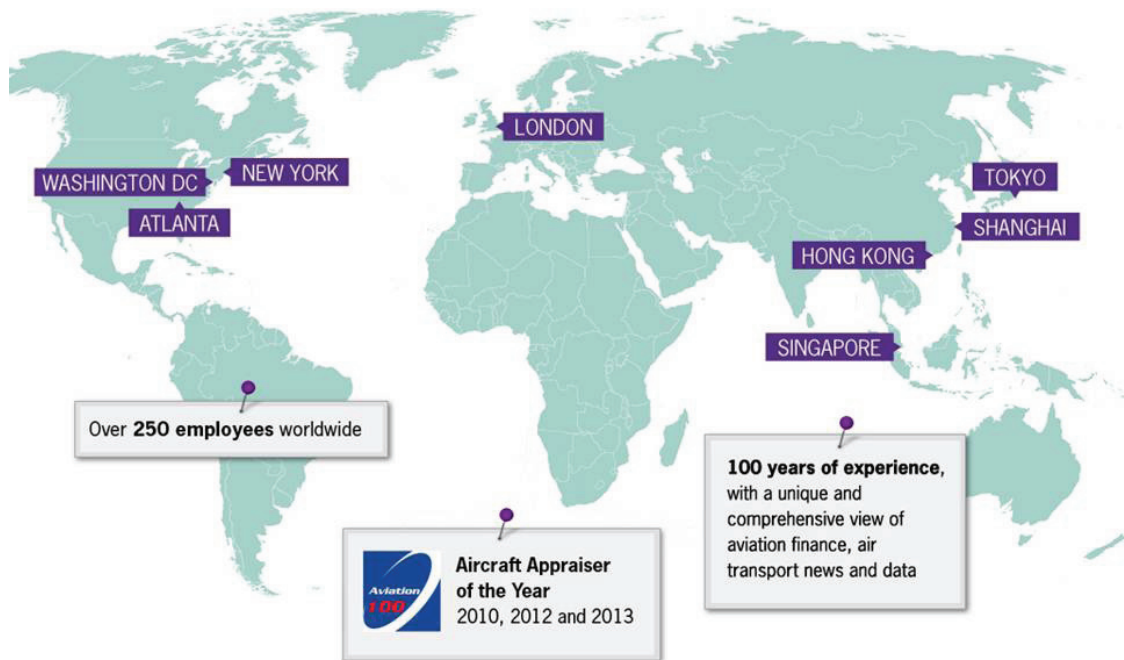
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