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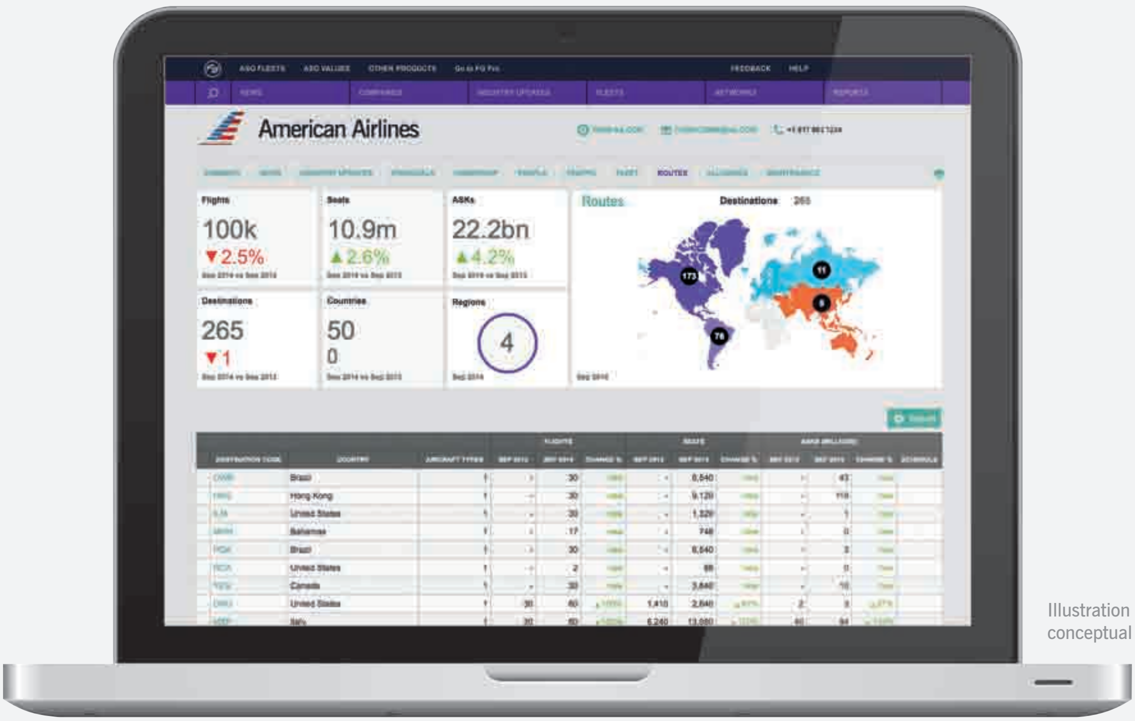
From industry trends to detailed routes and airline data, Flightglobal can help you to build your growth strategy



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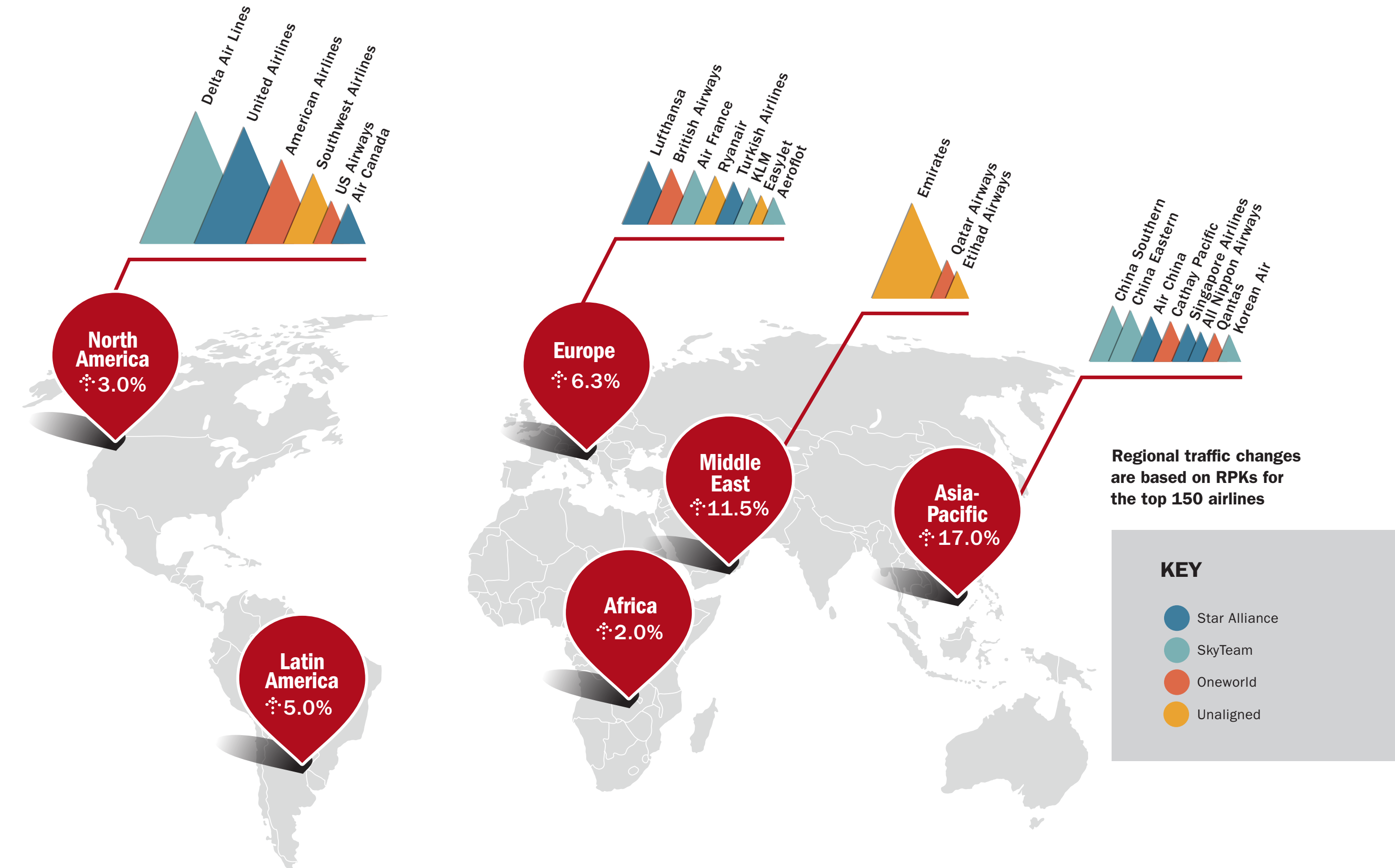
AIRLINES KEEP STEADY TRAFFIC PACE

Global passenger traffic among the 150 leading carriers increased 6% in 2014, the latest *Airline Business* World Airline Rankings show. This was slightly ahead of the capacity added and helped lift collective load factors to 80.5%



TOP 150 PASSENGER AIRLINE STATISTICS BY AIRLINE TYPE: 2014

Airline Type	Passenger traffic (RPK)		Load factors		Passenger numbers		Employee
	Million	Change (%)	Percent	Pt change	Million	Change (%)	share (%)
Leisure	219,073	4.5	88.3	-0.4	79	3.6	1.7
Low-cost	992,794	10.0	83.3	1.6	758	8.2	11.2
Mainline	4,606,395	5.3	79.5	-0.2	2,015	5.4	84.9
Regional	97,109	2.8	81.1	1.7	113	1.5	2.3
TOTAL	**5,915,370**	**6.0**	**80.5**	**0.2**	**2,964**	**5.9**	**100.0**

NOTE: Based on returns to the latest Top 150 airlines ranking

TOP 150 PASSENGER AIRLINE STATISTICS BY REGION: 2014

Region	Passenger traffic (RPK)		Load factors		Passenger numbers		Employee
	Million	Change (%)	Percent	Pt change	Million	Change (%)	share (%)
Africa	104,530	2.0	68.8	-1.5	42	6.3	3.8
Asia Pacific	1,765,358	7.0	77.9	-0.4	930	7.4	35.0
Europe	1,694,832	6.3	82.3	0.4	830	6.5	23.4
Latin America	285,489	5.6	80.0	1.9	202	5.4	5.8
Middle East	528,300	11.5	78.2	0.8	147	11.1	7.8
North America	1,536,863	3.0	83.4	0.3	813	2.9	24.3
TOTAL	**5,915,370**	**6.0**	**80.5**	**0.2**	**2,964**	**5.9**	**100.0**

NOTE: Based on returns to the latest Top 150 airlines ranking

TOP 20 AIRLINE GROUPS BY TRAFFIC

Rank	Airline group	RPK (m)
1	Delta Air Lines	326,465
2	American Airlines Group	314,802
3	United-Continental Holdings	288,036
4	Emirates Airline	235,498
5	Air France-KLM Group	229,347
6	Lufthansa Group	214,641
7	IAG	202,562
8	Southwest Airlines	173,829
9	China Southern Airlines Group	166,629
10	Air China	154,683
11	China Eastern Airlines	127,637
12	Ryanair	120,000
13	Cathay Pacific Group	112,257
14	Qantas Group	109,659
15	LATAM Airlines Group	108,534
16	Turkish Airlines	106,787
17	Singapore Airlines Group	99,952
18	Air Canada	99,140
19	Aeroflot	90,075
20	Qatar Airways	95,977

TOP 100 PASSENGER OPERATIONS

TOP PASSENGER OPERATIONS RANKED BY TRAFFIC 2014: 1 TO 50

Ranking 2014	(2013)	Airline	Country	Passenger traffic (RPK) Million	Change (%)	Seat capacity (ASK) Million	Change (%)	Load factor Percent	Pt change	Passenger number Million	Change (%)	Fleet Current
1	(1)	**Delta Air Lines**	USA	326,465	4.1	385,642	3.0	84.7	0.9	171.4	4.1	796
2	(2)	**United Airlines**	USA	288,036	0.2	344,495	0.5	83.6	-0.2	91.5	0.2	707
3	(3)	**Emirates Airline**	UAE	235,498	9.4	295,740	9.1	79.6	0.2	49.3	10.7	234
4	(4)	**American Airlines**	USA	208,108	0.7	253,576	2.0	82.1	-1.0	88.0	1.2	964
5	(5)	**Southwest Airlines**	USA	173,829	3.4	210,785	0.4	82.5	2.4	135.8	2.0	670
6	(6)	**Lufthansa**	Germany	156,826	2.3	197,478	1.9	79.4	0.3	77.5	1.7	276
7	(8)	**British Airways**	UK	138,431	5.4	170,917	5.9	81.0	-0.4	42.5	3.9	262
8	(9)	**China Southern Airlines**	China	135,637	11.4	168,530	11.3	80.5	0.1	77.9	9.6	491
9	(7)	**Air France** est	France	134,000	-1.8	162,500	-1.7	82.5	-0.1	47.0	-1.8	231
10	(10)	**China Eastern Airlines**	China	127,637	6.0	160,600	5.6	79.5	0.3	83.9	6.0	289
11	(13)	**Ryanair** est	Ireland	120,000	15.7	136,000	8.5	88.2	5.5	90.5	10.8	323
12	(12)	**Air China**	China	112,495	7.9	145,924	13.7	77.1	-4.1	54.6	5.0	333
13	(16)	**Turkish Airlines**	Turkey	106,787	16.1	135,330	16.3	78.9	-0.1	54.7	13.3	247
14	(11)	**US Airways**	USA	106,679	0.2	128,579	2.6	83.0	-2.0	57.6	0.9	
15	(15)	**Cathay Pacific**	Hong Kong	100,048	6.8	118,481	5.8	84.4	0.8	22.3	4.2	143
16	(17)	**Air Canada**	Canada	99,140	8.5	118,887	7.8	83.4	0.6	38.5	7.7	167
17	(19)	**Qatar Airways**	Qatar	95,977	16.4	126,767	15.5	75.7	0.6	22.3	14.9	161
18	(14)	**Singapore Airlines**	Singapore	94,209	-0.9	119,674	-0.7	78.7	-0.2	18.7	0.6	105
19	(18)	**KLM**	Netherlands	91,477	2.7	105,755	1.9	86.5	0.7	27.7	4.4	112
20	(21)	**All Nippon Airways**	Japan	74,221	8.4	109,698	7.0	67.7	0.9	50.4	2.9	190
21	(23)	**EasyJet**	UK	72,933	7.9	79,525	7.1	91.7	0.7	64.8	6.6	216
22	(20)	**Qantas**	Australia	71,270	-2.3	91,270	0.4	78.1	-2.1	22.1	-2.0	118
23	(28)	**Etihad Airways**	UAE	68,600	23.6	85,792	20.7	79.2	1.2	14.8	22.3	112
24	(22)	**Korean Air**	South Korea	67,948	-0.6	90,980	2.1	74.7	-2.0	23.5	-0.5	162
25	(25)	**Aeroflot**	Russia	67,122	11.4	85,822	12.3	78.2	-0.6	23.6	13.0	160
26	(27)	**JetBlue Airways**	USA	60,842	5.5	72,395	5.1	84.0	0.4	32.1	5.3	208
27	(26)	**TAM Linhas Aereas**	Brazil	60,247	1.7	72,715	-2.2	82.9	3.2	37.9	1.5	162
28	(24)	**Thai Airways International**	Thailand	56,377	-11.2	81,652	-4.7	69.0	-5.1	17.8	-17.4	80
29	(29)	**Japan Airlines**	Japan	52,890	7.6	72,960	8.2	72.5	-0.4	28.2	17.2	157
30	(32)	**Saudia**	Saudi Arabia	51,782	10.1	67,848	4.3	76.3	4.0	27.4	8.3	161
31	(30)	**Air Berlin**	Germany	49,270	1.4	59,031	3.1	83.5	-1.4	31.7	0.6	98
32	(34)	**LAN Airlines** est1	Chile	48,250	2.7	57,500	0.9	83.9	1.5	30.0	1.7	82
33	(33)	**Transaero Airlines**	Russia	47,066	0.1	56,367	0.2	83.5	-0.1	13.2	5.6	98
34	(31)	**Malaysia Airlines**	Malaysia	46,375	-1.9	62,570	7.2	74.1	-6.9	17.0	-1.0	97
35	(43)	**Hainan Airlines**	China	45,072	36.2	51,742	34.3	87.1	1.2	25.4	37.3	139
36	(35)	**Alaska Airlines**	USA	44,695	6.1	52,180	6.6	85.7	-0.4	21.0	6.3	139
37	(36)	**Iberia**	Spain	42,686	2.9	54,328	3.6	78.6	-0.6	10.7	1.1	75
38	(40)	**Shenzhen Airlines**	China	38,668	11.4	47,875	12.5	80.8	-0.8	26.3	10.2	155
39	(41)	**Gol Transportes Aereos**	Brazil	38,085	9.8	49,503	-0.3	76.9	7.1	40.1	9.5	129
40	(37)	**Virgin Atlantic Airways**	UK	37,664	-4.7	48,772	-3.1	77.2	-1.3	6.0	1.3	41
41	(59)	**Norwegian**	Norway	37,615	39.9	46,479	35.4	80.9	2.6	24.0	15.8	86
42	(42)	**China Airlines**	Taiwan	35,886	4.9	46,200	4.3	77.7	0.5	14.2	10.1	79
43	(39)	**Swiss**	Switzerland	35,717	1.8	42,679	1.8	83.7	0.0	16.2	1.3	76
44	(45)	**Asiana Airlines**	South Korea	35,223	7.4	46,780	5.0	75.3	1.7	16.5	7.7	84
45	(44)	**Air India**	India	35,101	6.7	47,702	6.9	73.6	-0.2	16.7	7.0	100
46	(46)	**SAS**	Sweden	34,594	5.9	45,158	4.4	76.6	1.1	28.4	6.2	146
47	(38)	**Alitalia** est	Italy	34,500	-3.0	46,000	-3.6	75.0	0.4	23.4	-2.6	106
48	(52)	**Jet Airways**	India	34,423	15.7	41,769	9.7	82.4	4.2	19.5	13.1	104
49	(48)	**WestJet**	Canada	33,514	6.3	41,165	6.7	81.4	-0.3	19.7	6.3	107
50	(49)	**Virgin Australia**	Australia	33,067	5.6	42,218	1.1	78.3	3.4	19.7	2.1	95

NOTES: est RPK/ASK/load factor estimated based on full-year passenger data; est1 *Airline Business* estimate; American Airlines includes US Airways Fleet; Air Berlin includes Niki; Virgin Australia 2013 figure includes SkyWest Australia for May and June only; Avianca includes TACA; SAS does not include Wideroe; China Eastern includes Shanghai Airlines; Air China includes Dalian

TOP PASSENGER OPERATIONS RANKED BY TRAFFIC 2014: 51 TO 100

Ranking 2014	(2013)	Airline	Country	Passenger traffic (RPK) Million	Change (%)	Seat capacity (ASK) Million	Change (%)	Load factor Percent	Pt change	Passenger number Million	Change (%)	Fleet Current
51	(50)	**Avianca**	Colombia	32,602	4.5	41,052	5.9	79.4	-1.0	26.2	6.5	83
52	(47)	**Thomson Airways**	UK	31,652	0.2	34,018	-0.4	93.0	0.6	10.4	-1.7	62
53	(60)	**Sichuan Airlines**	China	31,414	17.8	36,522	14.2	86.0	2.6	19.2	14.7	101
54	(51)	**Lion Air**[est]	Indonesia	31,400	5.0	35,000	4.8	89.7	0.2	36.0	5.2	103
55	(57)	**EVA Air**	Taiwan	30,518	10.2	39,039	12.3	78.2	-1.4	8.9	11.1	65
56	(55)	**Garuda Indonesia**	Indonesia	30,231	8.9	42,904	13.9	70.5	-3.2	21.6	10.0	134
57	(54)	**TAP Portugal**	Portugal	30,119	7.0	37,389	5.5	80.6	1.1	11.4	6.6	61
58	(63)	**Grupo Aeromexico**	Mexico	28,772	15.0	36,217	11.5	79.8	2.6	17.2	11.0	131
59	(53)	**Jetstar**	Australia	28,644	-0.1	36,824	1.5	77.8	-1.3	17.1	2.3	70
60	(56)	**Air New Zealand**	New Zealand	28,078	1.2	33,396	0.7	84.1	0.5	13.7	2.3	51
61	(66)	**Xiamen Airlines**	China	27,712	14.5	37,382	15.6	74.5	-0.5	20.4	9.6	118
62	(61)	**AirAsia**	Malaysia	27,274	2.5	34,590	3.6	78.8	-0.8	22.1	1.3	80
63	(62)	**Vietnam Airlines**[est1]	Vietnam	26,500	5.6	33,500	5.9	79.1	-0.2	16.0	6.7	79
64	(70)	**IndiGo**	India	26,048	14.0	33,528	16.3	77.7	-1.6	22.9	18.9	96
65	(65)	**Condor**	Germany	25,916	5.3	28,667	4.9	90.4	0.3	7.2	5.9	42
66	(58)	**ExpressJet Airlines**	USA	25,608	-5.6	31,536	-7.3	81.2	1.5	31.0	-6.1	367
67	(68)	**Copa Airlines**	Panama	25,604	9.5	33,398	9.5	76.7	0.0	7.8	0.2	80
68	(72)	**Wizz Air**	Hungary	25,351	21.5	29,267	20.0	86.7	1.0	16.5	18.4	61
69	(67)	**SkyWest Airlines**	USA	24,953	3.7	29,919	2.2	83.4	1.2	27.8	2.4	337
70	(78)	**Philippine Airlines**	Philippines	24,821	32.1	34,780	30.1	71.4	1.1	9.6	43.1	58
71	(64)	**Finnair**	Finland	24,772	0.0	30,889	-0.9	80.2	0.7	9.6	3.9	46
72	(76)	**Spirit Airlines**	USA	22,783	18.0	26,291	17.9	86.7	0.1	14.3	15.1	73
73	(71)	**Hawaiian Airlines**	USA	22,399	1.8	27,471	1.7	81.5	0.1	10.2	2.6	48
74	(69)	**South African Airways**	South Africa	22,313	-4.4	30,533	-1.7	73.1	-2.1	7.0	0.0	56
75	(73)	**Ethiopian Airlines**	Ethiopia	22,267	11.7	31,602	13.3	70.5	-1.0	6.2	10.7	69
76	(75)	**Air Europa**	Spain	21,980	13.1	26,174	14.1	84.0	-0.7	9.6	10.3	53
77	(82)	**Vueling Airlines**	Spain	21,445	25.3	26,686	24.2	80.4	0.7	21.5	24.9	99
78	(88)	**AirAsia X**	Malaysia	20,817	31.3	25,374	31.4	82.0	-0.1	4.2	33.8	16
79	(74)	**Thomas Cook Airlines**	UK	20,696	4.5	22,644	6.4	91.4	-1.7	6.0	-0.7	37
80	(83)	**UTair**	Russia	20,199	20.4	25,249	15.6	80.0	3.2	8.6	4.7	266
81	(85)	**Pegasus**[est]	Turkey	19,500	20.1	24,378	20.9	79.9	-0.6	19.7	17.4	54
82	(79)	**El Al**	Israel	18,984	1.7	23,018	2.2	82.5	-0.4	4.6	4.0	38
83	(80)	**TUIfly**[est]	Germany	18,500	2.8	20,500	2.5	90.2	0.2	7.8	2.6	27
84	(81)	**Austrian**	Austria	18,428	4.1	23,343	3.6	78.9	0.4	11.2	-1.0	76
85	(77)	**Egyptair**	Egypt	18,358	-3.1	28,562	-3.3	64.3	0.1	8.8	3.3	57
86	(84)	**Spring Airlines**	China	18,258	10.7	19,617	11.2	93.1	-0.5	11.4	8.5	50
87	(87)	**Frontier Airlines**	USA	17,946	13.1	20,175	15.4	89.0	-1.8	12.2	14.0	56
88	(90)	**Shandong Airlines**	China	17,580	12.8	22,881	13.8	76.8	-0.7	14.1	9.8	82
89	(86)	**Air Transat**[est1]	Canada	17,500	9.4	19,500	11.4	91.5	-0.5	3.5	5.0	25
90	(100)	**Cebu Pacific Air**	Philippines	16,213	25.4	20,496	26.5	79.1	-0.7	16.9	17.5	51
91	(89)	**Virgin America**	USA	16,212	2.7	19,695	0.0	82.3	2.2	6.5	2.8	53
92	(93)	**Aer Lingus**	Ireland	16,088	8.7	20,373	7.8	79.0	0.6	9.8	1.5	49
93	(92)	**Azul**	Brazil	15,707	4.9	19,701	4.1	79.7	0.6	20.0	7.3	146
94	(91)	**Monarch Airlines**	UK	15,705	2.8	19,357	7.8	81.1	-4.0	7.0	3.0	34
95	(95)	**Volaris**	Mexico	15,644	8.0	19,034	8.5	82.2	-0.4	9.8	9.7	53
96	(96)	**S7 Airlines**	Russia	15,583	9.8	19,503	11.1	79.9	-1.0	7.9	12.0	45
97	(97)	**Transavia Airlines**[est]	Netherlands	14,000	3.7	15,500	3.3	91.0	1.0	6.8	4.6	36
98	(107)	**Capital Airlines**	China	13,823	20.2	15,562	15.3	88.8	3.3	9.2	12.5	91
99	(103)	**Air Arabia**	UAE	13,800	11.3	17,000	11.3	81.0	1.0	6.8	11.3	34
100	(99)	**Nordwind Airlines**	Russia	13,402	-0.2	14,663	-4.5	91.4	3.9	4.5	22.3	18

NOTES: [est] RPK/ASK/load factor estimated based on full-year passenger data; [est1] *Airline Business* estimate; Lion Air passenger number reported locally; Cebu Pacific includes Tigerair Phillipines since July 2014

FOCUS ON AFRICAN AIRLINES

While fast-growing Ethiopian Airlines can point to another year of profit for its financial year just closed, fortunes have been much tougher at sub-Saharan Africa's two other biggest operators.

Kenya Airways and South African Airways both ended their most recent financial years in the red, and face much work to complete restructuring plans.

SOUTH AFRICAN AIRWAYS

Struggling SAA late last year found itself in familiar territory, with mounting financial woes, renewed boardroom tensions and the boss of its low-cost arm drafted in again as acting chief executive.

On taking up the acting role for the second time in two years, Mango boss Nico Bezuidenhout embarked on a 90-day plan to stem losses as the carrier's financial problems grew critical. This put the airline back on a firm enough footing for it to finalise its financial results and secure an additional finance ministry guarantee of R6.48 billion ($565 million). SAA is aiming to return to an EBIT profit in the next year and generate a bottom-line profit in the next five years.

The restructuring dropping unprofitable long-haul routes, covered instead by codeshares, enabling SAA to boost its own capacity on its more profitable intra-African routes.

But uncertainty remains after Bezuidenhout moved back to Mango in August 2015 – to be replaced by another acting chief, the flag carrier's general manager of human resources, Thuli Mpshe.

Much attention has focused on potential efforts to secure an investor for SAA, with the carrier linked to Gulf carriers Emirates and Etihad, and latterly, Air China.

But South Africa's finance ministry, which took over ministerial responsibility for the airline last year, in August said that it is not in talks with any party seeking an equity stake in the state-owned carrier.

KENYAN CONCERNS

If SAA has been dogged by financial challenges over recent

INTRA-AFRICAN CAPACITY FOR KENYA AIRWAYS AND SAA

Airline	ASKs Sep 2015	ASKs Sep 2014	Difference
Kenya Airways	526,701,592	524,414,714	0.4%
South African Airways	1,165,630,169	1,222,261,821	-4.6%
TOTAL	**7,321,768,569**	**6,915,366,494**	**5.9%**

SOURCE: Innovata – part of Flightglobal

INTERCONTINENTAL CAPACITY FOR KENYA AIRWAYS AND SAA

Airline	ASKs Sep 2015	ASKs Sep 2014	Difference
Kenya Airways	310,712,536	370,289,170	-16.1%
South African Airways	731,455,428	777,653,763	-5.9%
TOTAL	**15,742,419,461**	**15,121,385,106**	**4.1%**

SOURCE: Innovata – part of Flightglobal

IN-SERVICE FLEET FOR KENYA AIRWAYS AND SOUTH AFRICAN AIRWAYS

Kenya Airways
The Pride of Africa

15 X EMBRAER 190

14 X BOEING 737

7 X BOEING 787

3 X BOEING 777

TOTAL: 39

South African Airways
A STAR ALLIANCE MEMBER

17 X AIRBUS A340

13 X BOEING 737

12 X AIRBUS A320

8 X AIRBUS A319

6 X AIRBUS A330

TOTAL: 56

SOURCE: Flightglobal

years, the mounting problems facing Kenya Airways is less familiar. The airline had been something of a poster child for liberalisation in Africa, after successfully securing an investor in the shape of KLM, and embarking on a decade of unbroken operating profits. But its fortunes too have turned sharply.

The airline blamed terror attacks in East Africa and the outbreak of Ebola for a worsening of its annual result. Its loss for the 12 months ended 30 March widened to KSh16.3 billion ($160 million) from KSh2.7 billion the previous year.

While the airline lifted revenues 4%, costs spiralled which the Nairobi-based carrier attributed to higher overheads associated with its fleet renewal programme.

The carrier says the arrival of five Boeing 787s, two 777-200ERs and three 737-800s and the disposal of its 767 fleet "coincided with a difficult business environment driven by the incidences of terrorism in the region, together with adverse external factors like [the] West Africa Ebola crisis and the effects of travel advisories".

The carrier is in the market to sell four Boeing 777-200ERs as part of its efforts to rationalise its fleet, and recently returned two 767-300ERs to lessor GECAS.

The airline though has secured a €200 million ($218 million) bridging loan from Afreximbank to help stabilise its finances. The Cairo-based bank will become a financial adviser to the airline and conduct a "comprehensive review of Kenya Airways' debt profile with a view to recommending an optimal liability structure".

While it has been a challenging year for some of Africa's largest network carriers, some of the continent's smaller players are expanding at a frenetic pace.

Boeing

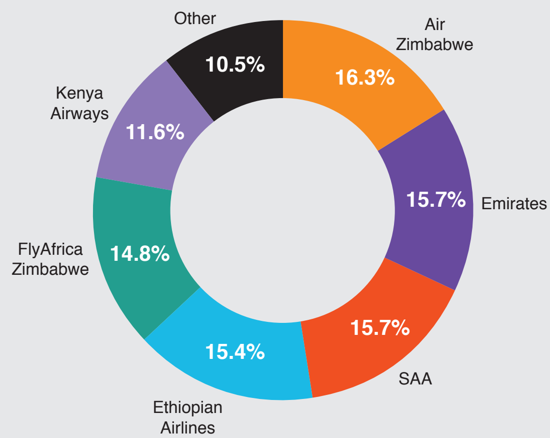
Ethiopian Airlines experienced another year of profit for its financial year that closed in June 2014

LOW-COST EXPANSION

Low-cost carriers such as Fastjet and Flyafrica are adding new routes and destinations, taking advantage of a relative loosening of regulatory regimes as they deploy subsidiaries to tap new markets beyond their respective bases in Tanzania and Zimbabwe.

Despite the airline having only started domestic and regional flights in July, Flightglobal's Innovata schedules show that Flyafrica is now Zimbabwe's second-largest operator, with a 15% market share by seat capacity, just behind Air Zimbabwe with 16%.

AIRLINES SERVING HARARE SHARE BY SEAT CAPACITY (SEP 2015)



SOURCE: Innovata – part of Flightglobal

Flyafrica chief executive Adrian Hamilton-Manns says the carrier's success is a result both of wooing travellers away from rivals and of stimulating new demand.

"It's a combination of the two: lots of low-cost carriers will tell you they are convincing people to fly rather than taking alternative forms of transport like buses, but it's also anybody who wants to save on an airfare. We have reduced the cost by 70% in markets we serve," says Hamilton-Manns.

Not content with this, the low-cost carrier has started a Namibian subsidiary and disclosed plans for several more, including a Gabon-based unit.

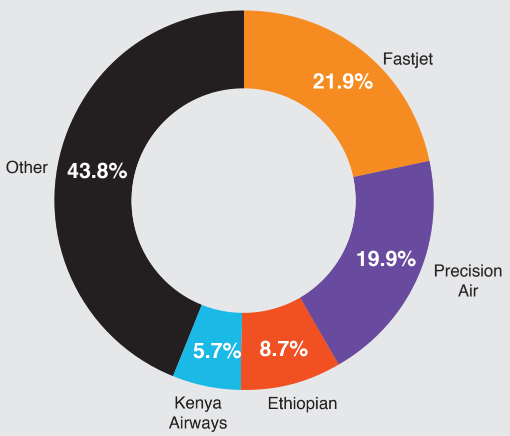
The Namibian subsidiary, it is envisioned, will initially operate services from Windhoek to Johannesburg three times a week before increasing this to a daily service and adding services to Cape Town. The airline intends to expand its fleet from one Boeing 737 to three in the next nine to 12 months.

Hamilton-Manns says he wants to establish at least one more start-up to serve the West African market. He acknowledges "a lot of speculation" that a unit could also be established in Mozambique.

FASTJET GROWTH

A similar picture is emerging in Tanzania where low-cost carrier Fastjet has become the largest operator in the country. Three years after starting flights, Innovata schedules show the carrier has taken the lead this year, with a 22% market share, ahead of local carrier Precision Air on 20%.

AIRLINES SERVING TANANZANIA SHARE BY SEAT CAPACITY (SEP 2015)



SOURCE: Innovata – part of Flightglobal

"Fastjet's success is based upon a firm market-stimulation model," says Richard Bodin, the airline's commercial chief. "With fares as a low as $20 plus tax, we have managed to attract passengers from both existing airlines but, more critically, from buses, ferries and trains. We have given people the opportunity to travel by air and made it safer and more reliable."

To support this, Bodin notes that in December 2014 the African carrier found that 35% of its passengers had "never been inside an airport before this first Fastjet flight".

Fastjet continues to grow its Tanzanian network, adding a new service from Kilimanjaro to Entebbe in March. The Ugandan city was Fastjet's first international destination from Kilimanjaro, and the carrier added a route to Malawi's capital Lilongwe in July.

But the carrier also has ambitions to become a continent-wide operator and is seeking to start new subsidiaries in Kenya, Zambia and Zimbabwe.

This strategy has not been without its challenges, however. An attempt to take over South Africa's 1time as a precursor to starting flights within the country ended without a deal, and Fastjet has faced repeated delays to the processing of its licence to start a unit in Kenya.

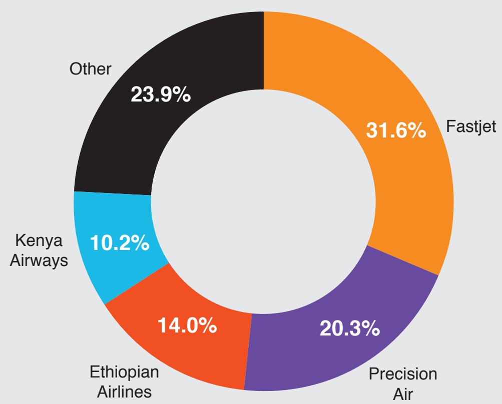
Nevertheless, Bodin foresees the carrier's planned Zambian and Zimbabwean subsidiaries both starting operations this year.

TANZANIA

Suleiman Said Suleiman, director general of the Tanzania Airports Authority, describes the country's aviation market as being in a "positive state of flux" thanks to more long-haul capacity added by the likes of Swiss and KLM but also to the "phenomenal growth" of Fastjet.

The low-cost carrier is now the largest operator at capital Dar es Salaam's Julius Nyerere International airport, and Suleiman expects low-cost carriers to become the "prime drivers of new traffic growth across Africa".

AIRLINES SERVING DAR ES SALAAM SHARE BY SEAT CAPACITY (SEP 2015)



SOURCE: Innovata – part of Flightglobal

He adds: "Fastjet has given Tanzania the opportunity to grow its regional trade and leisure connections, primarily by stimulating new demand. This new air travel demand comes to a large extent from people who would previously have travelled inefficiently over long distances by car and bus. Over 30% of Fastjet's passengers remain first-time flyers."

Meanwhile, Tanzania's second-tier Kilimanjaro International airport (KIA) is also attracting new airlines and growing its passenger traffic. The self-styled "gateway to Africa's wildlife heritage" is close to the northern safari-circuit national parks, the Serengeti national park and Mount Kilimanjaro, helping it to attract long-haul airlines and tour operators.

For this reason, KIA primarily serves leisure passengers and has a mix of European and Middle Eastern carriers including Condor, KLM, Qatar Airways and Turkish Airlines. In 2014, the airport handled just over 800,000 passengers.

"While KIA largely serves a leisure market, this traffic reaches KIA almost exclusively on scheduled services. We have KLM and Condor from Europe, Turkish and Qatar via the Middle East region, and Ethiopian and Kenya Airways via Africa as key seat providers for this segment," says KIA's acting managing director Bakari Murusuri.

Murusuri says that while there is a "lot of focus now on China and India, we see this is a longer-term effort". For the time being, KIA is concentrating on attracting more carriers from the Middle East, through which long-haul passengers can be hubbed, and South Africa, which he describes as "a large market for us that remains unserved".

SOUTH AFRICA

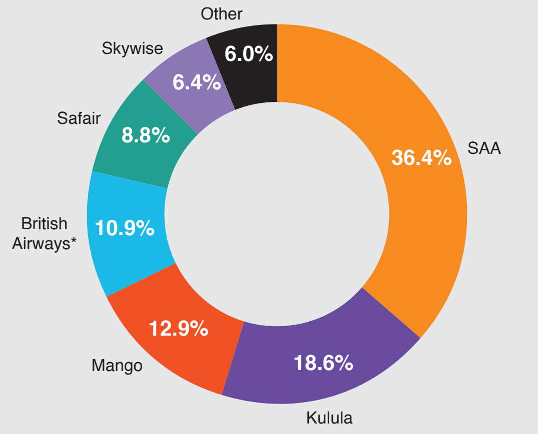
South Africa continues to attract new entrants and start-ups. New domestic and regional airlines regularly appear to challenge the dominance of South African Airways and serve some of the country's lucrative domestic city pairs, with 2015 being no exception.

Innovata schedules show that, overall, the lion's share of the South African market is divided between flag carrier SAA and its low-cost subsidiary Mango, with over 50% of seat capacity, while Comair – through its British Airways franchise operations and its low-cost brand Kulula – commands nearly a quarter.

But the domestic market provides a slightly more varied picture. On the Johannesburg-Cape Town route, for example, while Comair and SAA remain dominant new entrant Skywise accounts for 6.4% of the market and FlySafair accounts for another 8.8% – despite both airlines having operated on the route for less than a year.

A concept developed by the original founders of defunct carrier 1time, Skywise was non-operational until the licence was purchased by a company called PAK Aviation in 2014. Launch with a single 737 followed in March this year. The carrier currently operates only from Johannesburg to Cape Town but targets an average of 36,000 passengers per month.

AIRLINES SERVING CAPE TOWN-JOHANNESBURG SHARE BY SEAT CAPACITY (SEP 2015)



SOURCE: Innovata – part of Flightglobal. *BA includes Comair franchise flight

Another airline that has just started flights is Fly Blue Crane. Headed by ex-SAA chief executive Siza Mzimela, the Johannesburg-based carrier makes no reference to a low-cost model but plans to operate a fleet of Embraer ERJ-145s in single-class configuration on domestic routes from its Johannesburg base to Bloemfontein, Kimberley and Nelspruit.

But it is possibly FlySafair that has made the greatest impression on the market. Having started operations in October 2014 with a single 737-400 on the Johannesburg-Cape Town route, the South African operator soon added a service linking Cape Town with Port Elizabeth.

In November, FlySafair opened its second base at Johannesburg, complementing its operation at Cape Town.

Today, the carrier has four 737-400s, and plans to take delivery of three 737-800s to give it a total of six once two of its 737-400s are phased out. It will begin flights to East London and Durban from Johannesburg and Cape Town on 25 October.

Chief executive Elmar Conradie says the carrier had originally only planned to have a fleet of two aircraft by the end of the year, but growth of passengers on all routes "happened a lot quicker than we thought". He expects the airline to have carried one million passengers by December.

This is an abridged version of articles published on flightglobal.com. To read more on this and other African airline developments go to ***flightglobal.com/dashboard***

THE WORLD'S TOP AIRPORTS

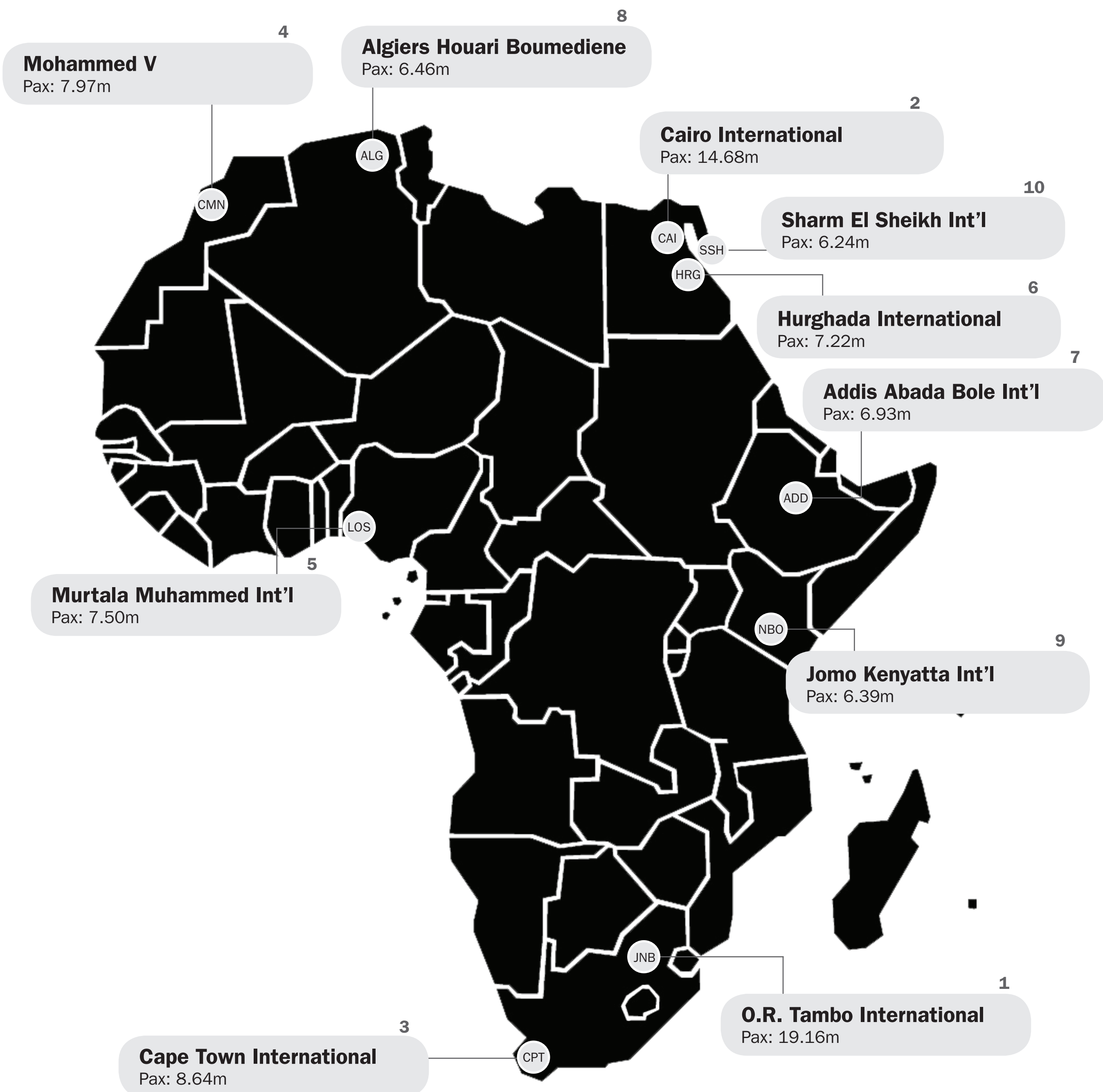
The *Airline Business* Top 150 airports traffic ranking, compiled using Airports Council International data, shows passenger numbers increased by 5.4% in 2014, outpacing the 4% growth leading hubs enjoyed in the previous year

TOP 50 AIRPORTS: PRELIMINARY PASSENGER RANKING 2014 (1-50) AND INNOVATA FREQUENCY/CAPACITY ANALYSIS (MAY 2015)

Rank 2014	(2013)	City	Airport	Code	Country	Passengers Number (000)	Passengers Change (%)	Available seats per week Number (000)	Available seats per week Av change (%)	Seats share by destination Intercont'l (%)	Seats share by destination Regional (%)
1	(1)	**Atlanta**	Hartsfield Int'l	ATL	USA	96,179	1.9	2,531	9.1	8.1	91.9
2	(2)	**Beijing**	Capital	PEK	China	86,128	2.9	2,313	3.6	17.1	82.9
3	(3)	**London**	Heathrow	LHR	UK	73,408	1.4	2,055	4.8	55.1	44.9
4	(4)	**Tokyo**	Haneda International	HND	Japan	72,827	5.7	2,108	-0.4	7.8	92.2
5	(6)	**Los Angeles**	International	LAX	USA	70,663	6.0	1,998	6.8	20.9	79.1
6	(7)	**Dubai**	International	DXB	UAE	70,476	6.1	2,127	34.2	76.0	24.0
7	(5)	**Chicago**	O'Hare International	ORD	USA	69,999	4.8	1,954	8.6	11.9	88.1
8	(8)	**Paris**	Charles de Gaulle	CDG	France	63,814	2.8	1,625	4.0	52.1	47.9
9	(9)	**Dallas/Fort Worth**	International	DFW	USA	63,554	5.1	1,592	3.1	7.1	92.9
10	(11)	**Hong Kong**	International	HKG	China	63,122	5.9	1,687	5.8	49.4	50.6
11	(12)	**Frankfurt**	International	FRA	Germany	59,566	2.6	1,689	2.3	48.0	52.0
12	(10)	**Jakarta**	Soekarno Hatta	CGK	Indonesia	57,221	-4.8	1,695	1.3	11.0	89.0
13	(18)	**Istanbul**	Ataturk International	IST	Turkey	56,767	10.6	1,554	11.0	44.4	55.6
14	(14)	**Amsterdam**	Schiphol	AMS	Netherlands	54,978	4.6	1,406	6.9	37.2	62.8
15	(16)	**Guangzhou**	Baiyun International	CAN	China	54,780	4.4	1,397	2.5	15.7	84.3
16	(13)	**Singapore**	Changi	SIN	Singapore	54,093	0.7	1,519	2.3	56.1	43.9
17	(15)	**Denver**	International	DEN	USA	53,473	1.7	1,544	6.6	1.6	98.4
18	(19)	**New York**	JFK	JFK	USA	53,255	5.6	1,438	4.7	50.7	49.3
19	(21)	**Shanghai**	Pudong	PVG	China	51,688	9.5	1,588	21.2	24.7	75.3
20	(20)	**Kuala Lumpur**	International	KUL	Malaysia	48,930	3.0	1,384	6.2	36.8	63.2
21	(22)	**San Francisco**	International	SFO	USA	47,115	4.8	1,350	6.4	18.1	81.9
22	(17)	**Bangkok**	Suvarnabhumi	BKK	Thailand	46,423	-9.6	1,366	11.0	63.2	36.8
23	(24)	**Seoul**	Incheon International	ICN	South Korea	45,662	9.6	1,225	12.0	48.6	51.4
24	(23)	**Charlotte**	Douglas	CLT	USA	44,280	1.9	1,094	0.6	6.0	94.0
25	(25)	**Las Vegas**	McCarran	LAS	USA	42,870	4.7	1,340	4.5	3.5	96.5
26	(27)	**Phoenix**	Sky Harbor	PHX	USA	42,125	4.4	1,238	5.3	1.3	98.7
27	(29)	**Madrid**	Barajas	MAD	Spain	41,823	5.3	1,173	10.5	28.7	71.3
28	(28)	**Houston**	George Bush	IAH	USA	41,240	3.6	1,161	10.7	13.6	86.4
29	(26)	**Miami**	International	MIA	USA	40,942	0.9	1,049	9.5	43.9	56.1
30	(33)	**Sao Paulo**	Guarulhos Int'l	GRU	Brazil	39,766	9.9	972	-4.2	23.1	76.9
31	(32)	**Delhi**	Indira Gandhi Int'l	DEL	India	39,753	8.3	1,262	5.0	23.7	76.3
32	(30)	**Munich**	International	MUC	Germany	39,701	2.7	1,093	-2.8	27.9	72.1
33	(31)	**Sydney**	Kingsford Smith	SYD	Australia	38,863	1.6	1,006	1.5	27.7	72.3
34	(35)	**Toronto**	Pearson International	YYZ	Canada	38,569	6.8	996	9.0	29.5	70.5
35	(34)	**Rome**	Fiumicino	FCO	Italy	38,506	6.5	1,107	10.7	28.3	71.7
36	(37)	**London**	Gatwick	LGW	UK	38,106	7.5	956	3.3	21.2	78.8
37	(36)	**Shanghai**	Hongqiao Int'l	SHA	China	37,971	6.7	1,054	6.3	0.0	100.0
38	(44)	**Chengdu**	Shuangliu Int'l	CTU	China	37,712	12.8	1,030	9.4	5.1	94.9
39	(39)	**Barcelona**	El Prat	BCN	Spain	37,540	6.7	1,019	3.0	15.2	84.8
40	(41)	**Seattle Tacoma**	International	SEA	USA	37,498	7.7	1,075	12.3	7.4	92.6
41	(47)	**Shenzhen**	Baoan International	SZX	China	36,273	12.4	1,066	12.0	2.5	97.5
42	(51)	**Taipei**	Taoyuan Int'l	TPE	Taiwan	35,804	16.6	948	6.9	32.4	67.6
43	(42)	**Orlando**	International	MCO	USA	35,714	2.7	1,135	15.6	10.4	89.6
44	(40)	**Newark**	Liberty International	EWR	USA	35,611	1.7	1,047	13.2	23.8	76.2
45	(38)	**Tokyo**	Narita International	NRT	Japan	35,535	0.6	936	2.8	54.0	46.0
46	(43)	**Minneapolis-St. Paul**	International	MSP	USA	35,147	3.7	906	2.4	4.5	95.5
47	(48)	**Mumbai**	International	BOM	India	34,994	9.5	1,114	6.3	25.6	74.4
48	(49)	**Mexico City**	Benito Juarez Int'l	MEX	Mexico	34,256	8.6	988	10.4	13.9	86.1
49	(45)	**Manila**	Ninoy Aquino Int'l	MNL	Philippines	34,015	3.5	932	-11.3	35.7	64.3
50	(50)	**Moscow**	Domodedovo Int'l	DME	Russia	33,108	7.3	721	3.6	54.5	45.5

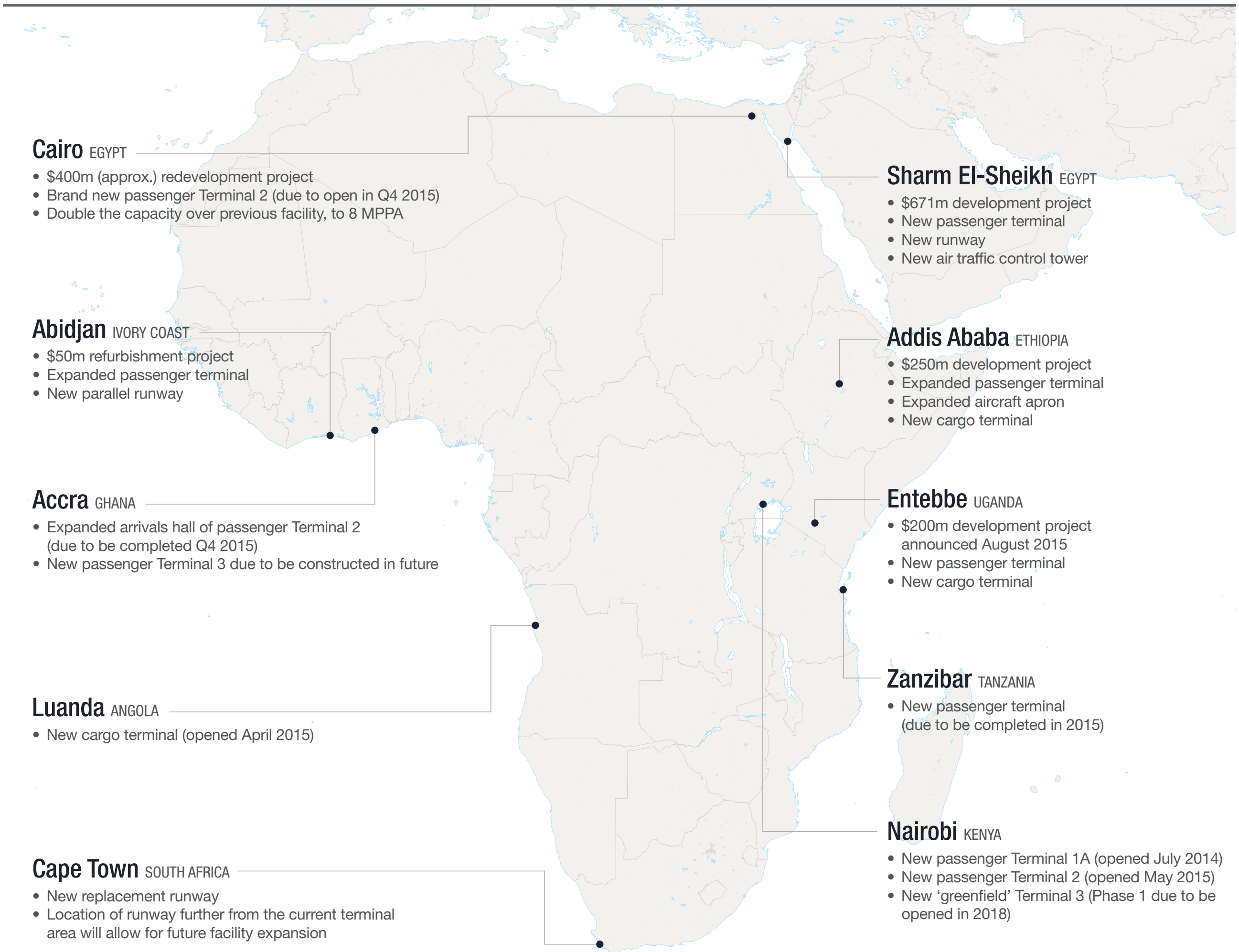
Frequencies per week		Average seats per flight		Proportion of flights/frequencies by three leading carriers					
Number	Change (%)	Number	Change (%)	Carrier 1		Carrier 2		Carrier 3	
18,378	4.7	138	4.1	Delta Air Lines	63.6%	ExpressJet Airlines	15.2%	Southwest Airlines	10.1%
11,796	0.1	196	3.5	Air China	39.0%	China Southern Airlines	14.9%	China Eastern Airlines	14.2%
9,726	1.7	211	3.1	British Airways	51.6%	Aer Lingus	4.6%	Virgin Atlantic Airways	3.2%
9,198	1.0	229	-1.4	All Nippon Airways	32.7%	Japan Airlines	31.5%	Solaseed Air	7.6%
13,022	1.8	153	5.0	SkyWest Airlines	14.4%	Southwest Airlines	14.0%	United Airlines	11.8%
7,560	40.3	281	-4.3	Emirates	46.2%	Flydubai	20.1%	Qatar Airways	2.7%
17,986	-0.8	109	9.5	United Airlines	18.1%	Envoy Air	16.6%	American Airlines	13.3%
8,898	1.8	183	2.1	Air France	43.0%	Aerienne Europeene	9.1%	EasyJet	7.3%
13,444	1.4	118	1.7	American Airlines	48.6%	Envoy Air	18.5%	Mesa Airlines	9.2%
6,852	6.8	246	-0.9	Cathay Pacific Airways	26.1%	Dragonair	17.1%	Hong Kong Airlines	8.9%
9,100	-1.0	186	3.4	Lufthansa	58.0%	Lufthansa CityLine	7.5%	Austrian Airlines	2.2%
8,958	3.0	189	-1.7	Garuda Indonesia	31.1%	Lion Airlines	28.3%	Sriwijaya Air	10.3%
8,740	8.5	178	2.3	Turkish Airlines	76.0%	Onur Air	4.9%	Atlasjet Airlines	4.7%
8,634	4.0	163	2.8	KLM	29.8%	KLM Cityhopper	23.5%	EasyJet	7.6%
8,374	3.0	167	-0.6	China Southern Airlines	50.8%	China Eastern Airlines	9.0%	Shenzhen Airlines	7.9%
6,742	1.9	225	0.3	Singapore Airlines	24.0%	Silkair	11.2%	Tiger Airways	10.5%
12,702	1.5	122	5.1	Southwest Airlines	23.4%	SkyWest Airlines	19.8%	United Airlines	19.8%
8,582	2.0	168	2.6	JetBlue Airways	25.8%	Delta Air Lines	19.9%	American Airlines	11.2%
8,612	22.4	184	-1.0	China Eastern Airlines	29.2%	Shanghai Airlines	10.1%	China Southern Airlines	9.6%
6,970	6.6	199	-0.4	AirAsia	35.7%	Malaysia Airlines	35.0%	Malindo Air	4.9%
8,870	-1.0	152	7.5	United Airlines	30.2%	SkyWest Airlines	19.7%	Virgin America	8.7%
6,112	13.6	223	-2.3	Thai Airways	25.9%	Bangkok Airways	16.8%	Centurion Air Cargo	6.8%
5,280	11.4	232	0.6	Korean Air Lines	28.4%	Asiana Airlines	22.7%	Coyne Airways	5.1%
10,482	2.1	104	-1.5	US Airways	38.0%	PSA Airlines	31.1%	Piedmont	8.6%
8,658	2.0	155	2.4	Southwest Airlines	44.4%	United Airlines	8.1%	Delta Air Lines	6.5%
8,908	2.2	139	3.0	US Airways	33.3%	Southwest Airlines	31.5%	SkyWest Airlines	11.7%
6,962	9.2	169	1.2	Iberia	23.0%	Air Nostrum	15.1%	Air Europa	12.8%
10,494	3.1	111	7.4	United Airlines	34.0%	ExpressJet Airlines	32.6%	SkyWest Airlines	8.8%
6,626	4.7	158	4.6	American Airlines	57.3%	Republic Airline	11.7%	Delta Air Lines	5.9%
5,552	-5.1	175	0.9	Gol Transportes Aereos	30.6%	TAM	30.6%	Azul	9.1%
7,188	6.0	176	-0.9	Indigo	25.0%	Air India	20.5%	Jet Airways	18.7%
7,030	-4.4	156	1.7	Lufthansa	32.2%	Lufthansa CityLine	22.1%	Air Berlin	7.2%
6,070	3.2	166	-1.6	Qantas Airways	34.7%	Virgin Australia	24.2%	Jetstar Airways	12.9%
8,420	7.2	118	1.7	Air Canada	28.6%	Jazz Air	18.4%	Westjet	15.7%
6,664	9.1	166	1.5	Alitalia	32.6%	Vueling Airlines	9.1%	EasyJet	8.2%
5,312	2.3	180	0.9	EasyJet	44.8%	British Airways	17.1%	Norwegian	8.1%
5,902	6.6	179	-0.2	China Eastern Airlines	33.3%	Shanghai Airlines	17.1%	Spring Airlines	9.3%
6,294	8.6	164	0.8	Air China	27.9%	Sichuan Airlines	19.0%	China Eastern Airlines	12.7%
5,724	2.1	178	0.9	Vueling Airlines	39.3%	Ryanair	12.8%	EasyJet	7.7%
7,912	11.0	136	1.1	Alaska Airlines	30.8%	Horizon Air	21.9%	Delta Air Lines	9.9%
6,530	14.6	163	-2.3	Shenzhen Airlines	28.7%	China Southern Airlines	25.3%	Hainan Airlines	10.0%
3,756	7.7	252	-0.7	China Airlines	26.0%	EVA Air	21.9%	Cathay Pacific Airways	7.7%
7,290	13.2	156	2.1	Southwest Airlines	30.8%	JetBlue Airways	14.8%	Delta Air Lines	12.0%
8,494	12.9	123	0.3	United Airlines	35.9%	ExpressJet Airlines	19.7%	Shuttle America	6.7%
4,094	3.1	229	-0.3	Japan Airlines	16.4%	All Nippon Airways	11.3%	Jetstar Japan	11.0%
7,856	-3.1	115	5.7	Delta Air Lines	34.5%	Endeavor Air	16.9%	SkyWest Airlines	15.3%
6,226	7.3	179	-0.9	Jet Airways	29.1%	Indigo	23.6%	Air India	14.8%
7,658	5.5	129	4.6	Aeromexico Connect	26.2%	Aeromexico	21.3%	InterJet	20.5%
5,016	-15.4	186	4.8	Cebu Pacific	34.2%	PAL Express	17.5%	Philippine Airlines	17.0%
4,680	0.9	154	2.7	S7 Airlines	25.3%	Transaero Airlines	12.4%	Ural Airlines	7.9%

TOP 10 AFRICAN AIRPORTS



Note: passenger figures for 2014
SOURCE: Flightglobal

BUILDING AFRICAN CAPACITY



Investment is underway across a number of African airports, as the region works to provide the necessary infrastructure to support the continent's growth ambitions.

One African hub airport which has seen the most change over the past two years is Nairobi's Jomo Kenyatta (JKIA). The airport was already in the midst of much needed redevelopment and expansion, even before a fire destroyed part of the terminal two years ago. The brand new Terminal 1A had been under construction for several years prior to it's opening in July 2014, and compared with the existing facilities features state of the art security equipment and vastly superior passenger comforts.

To alleviate the capacity strain on the Terminal 1 facilities another new structure has been built. Terminal 2 opened in mid-May with capacity for 2.5 million passengers per annum, boosting JKIA's total capacity to 7.5 million. The prefabricated structure may be simple and inexpensive, but is ultimately a temporary measure.

JKIA is preparing to handle approximately 25 million passengers per annum a decade from now, and it's long term development centres around a new Greenfield terminal, which will replace all of the current infrastructure. Terminal 3 will be capable of handling 20 million passengers annually with phase 1 of the project expected to be opened in 2018.

Our graphic depicts a selection of ongoing and recently completed infrastructure development projects at some of the larger operational airports around Africa. It does not include entirely new start-up airports.

AIRPORT ANALYSIS: FOCUS ON GROWTH

Some of the fastest growing airports in Africa have been in Egypt as tourism in the country has rebounded. September data from Flightglobal's schedules specialist Innovata shows four of the ten fastest growing African airports compared with the same month in 2014 are based in Egypt. Fastest growing is popular tourist spot Sharm El-Sheikh which is showing a 30% increase in capacity followed by nearby Hurghada with a 26% increase. Sharm El-Sheikh is currently going through a significant development including a new passenger terminal and a new runway.

Egyptian capital Cairo – the second most visited airport in Africa with more than 14 million passengers in 2014 – grew faster in absolute terms, It has over 24,000 more weekly departing seats this September – an increase in capacity of 11%. It too is in the middle of a redevelopment project and is due to open a new passenger terminal by the end of the year.

Among the other fastest growing African airports are Tanzania's Dar es Salaam and Ethiopia's Addis Ababa. Low-cost carriers such as Fastjet are fueling growth at Dar es Salaam, while fast developing home carrier Ethiopian Airlines is driving growth at Addis Ababa.

September data shows the continued fast growth of the big Gulf carrier hubs. Qatar Airways' Doha hub and the Abu Dhabi base of Etihad – which has also driven additional traffic to the airport through its airline partnerships strategy – are both among the ten fastest growing airports by percentage rates, even allowing for their existing scale. The region's biggest airport, Dubai, also continued to see double-digit capacity expansion in September.

While there are wider concerns of an economic slowdown, airlines continue to lift capacity in China, Seven of the fastest growing Asia-Pacific airports by capacity are Chinese, September Innovata seat data shows. Notably some of the fastest rates of growth are being seen at airports beyond the big Chinese gateways. Elsewhere in the region low-cost carriers are helping to drive rapid growth at Bangkok's Don Mueang airport, which enjoyed a 43% increase in capacity compared with a year ago.

Innovata schedules data shows that Sharm El-Sheikh's seat capacity has increased by 30% in September 2015 on the previous year

AFRICA AIRPORTS – SEAT CAPACITY GROWTH

Airport	Sept 2015	Sept 2014	Difference	Change
Sharm El-Sheikh, EG	39,160	30,037	9,123	30.4%
Hurghada, EG	39,988	31,698	8,290	26.2%
Dar es Salaam, TZ	39,461	33,160	6,301	19.0%
Cape Town, ZA	111,063	94,895	16,168	17.0%
Addis Ababa, ET	110,547	94,642	15,905	16.8%
Alexandria, EG	35,793	32,071	3,722	11.6%
Cairo, EG	238,580	214,575	24,005	11.2%
Algiers, DZ	93,942	86,529	7,413	8.6%
Mauritius, MU	32,307	30,024	2,283	7.6%
Marrakech, MA	49,566	46,413	3,153	6.8%

SOURCE: Innovata – part of Flightglobal Note: Data is based on one week of scheduled data (September 2015 against September 2014) for airports with a minimum of 30,000 seats/week

ASIA-PACIFIC AIRPORTS – SEAT CAPACITY GROWTH

Airport	Sept 2015	Sept 2014	Difference	Change
Bangkok, TH (DMK)	368,684	256,435	112,249	43.8%
Fuzhou, CN	148,490	107,924	40,566	37.6%
Hangzhou, CN	366,377	287,907	78,470	27.3%
Urumqi, CN	259,644	205,435	54,209	26.4%
Tianjin, CN	175,369	140,071	35,298	25.2%
Taiyuan, CN	122,183	100,024	22,159	22.2%
Hanoi, VN	203,778	167,260	36,518	21.8%
Nanjing, CN	247,132	204,488	42,644	20.9%
Ho Chi Minh City, VN	315,171	263,137	52,034	19.8%
Chengdu, CN	504,633	426,677	77,956	18.3%

SOURCE: Innovata – part of Flightglobal Note: Data is based on one week of scheduled data (September 2015 against September 2014) for airports with a minimum of 100,000 seats/week

EUROPE AIRPORTS – SEAT CAPACITY GROWTH

Airport	Sept 2015	Sept 2014	Difference	Change
Simferopol, UA	114,244	55,926	58,318	104.3%
Moscow-Vnukovo, CF, RU	244,863	162,846	82,017	50.4%
Sabiha Gokcen, TR	394,035	317,324	76,711	24.2%
Antalya, TR	253,372	212,088	41,284	19.5%
Budapest, HU	136,405	116,038	20,367	17.6%
Porto, PT	103,080	89,867	13,213	14.7%
Istanbul, TR	825,370	728,449	96,921	13.3%
London-Luton, EN	159,796	142,227	17,569	12.4%
Izmir-Adnan Mend, TR	148,873	132,678	16,195	12.2%
Glasgow, SC	119,151	106,446	12,705	11.9%

SOURCE: Innovata – part of Flightglobal Note: Data is based on one week of scheduled data (September 2015 against September 2014) for airports with a minimum of 100,000 seats/week

In Europe airline capacity growth is strong at several non-EU airports – notably in Turkey – after a recent period in which passenger growth in that region has been outshone by European Union airports. The Russian market has been particularly hard hit. But while airlines continue to curb capacity at Moscow's two biggest airports of Sheremetyevo and Domodedovo, airlines – including Aeroflot budget unit Pobeda – have expanded at the city's smaller Vnukovo airport. Western European low-cost carriers are behind much of the strong growth at Porto, London Luton and Glasgow airports.

LATIN AMERICA AIRPORTS – SEAT CAPACITY GROWTH

Airport	Sept 2015	Sept 2014	Difference	Change
Lima, PE	220,959	189,923	31,036	16.3%
Guadalajara, MX	115,147	99,258	15,889	16.0%
Cancun, MX	153,358	132,395	20,963	15.8%
Buenos Aires, AR	116,961	102,821	14,140	13.8%
Monterrey, MX	101,867	94,034	7,833	8.3%
Mexico City, MX	463,276	431,346	31,930	7.4%
Brasilia, DF, BR	244,695	233,563	11,132	4.8%
Belo Horizonte, BR	144,983	139,323	5,660	4.1%
Sao Paulo-Congonhas, BR	261,620	251,594	10,026	4.0%
Santiago, CL	182,663	176,911	5,752	3.3%

SOURCE: Innovata – part of Flightglobal Note: Data is based on one week of scheduled data (September 2015 against September 2014) for airports with a minimum of 100,000 seats/week

MIDDLE EAST AIRPORTS – SEAT CAPACITY GROWTH

Airport	Sept 2015	Sept 2014	Difference	Change
Tehran, IR (THR)	72,264	49,325	22,939	46.5%
Tehran, IR (IKA)	77,726	58,624	19,102	32.6%
Muscat, OM	145,598	114,882	30,716	26.7%
Doha, QA	448,626	368,478	80,148	21.8%
Madinah, SA	57,745	48,435	9,310	19.2%
Abu Dhabi, AE	294,647	252,712	41,935	16.6%
Jeddah, SA	344,342	296,937	47,405	16.0%
Kuwait, KW	183,879	159,808	24,071	15.1%
Sharjah, AE	106,584	92,917	13,667	14.7%
Dammam, SA	112,558	99,992	12,566	12.6%

SOURCE: Innovata – part of Flightglobal Note: Data is based on one week of scheduled data (September 2015 against September 2014) for airports with a minimum of 50,000 seats/week

NORTH AMERICA AIRPORTS – SEAT CAPACITY GROWTH

Airport	Sept 2015	Sept 2014	Difference	Change
Dallas-Love, TX, US	189,499	109,265	80,234	73.4%
Cleveland, OH, US	101,036	84,587	16,449	19.4%
Miami, FL, US	443,992	398,700	45,292	11.4%
Orlando, FL, US	366,560	331,236	35,324	10.7%
New Orleans, LA, US	122,357	110,652	11,705	10.6%
Seattle, WA, US	489,613	444,385	45,228	10.2%
Washington-National, DC, US	286,187	261,071	25,116	9.6%
Fort Lauderdale, FL, US	242,947	222,154	20,793	9.4%
Austin, TX, US	138,655	127,682	10,973	8.6%
Orange County, CA, US	117,535	108,601	8,934	8.2%

SOURCE: Innovata – part of Flightglobal Note: Data is based on one week of scheduled data (September 2015 against September 2014) for airports with a minimum of 100,000 seats/week

While capacity growth has been much tighter across US airports, some airports such as Cleveland are seeing airlines coming in to fill a gap left after United Airlines dropped its hub at the airport in June 2014. The fastest growing US airport is Dallas Love Field airport, driven by expansion from Southwest Airlines after local constraints on flight operations from the airport were lifted last October.

Perhaps the most telling sign of the current climate in Latin America is the relative absence of Brazilian airports from the list of fastest growing. Airlines have curbed their Brazilian operations, the biggest market in the region, as economic and political challenges have mounted.

TOP AIRPORT GROUPS

Ahead of publication in *Airline Business* of our annual Airport Group Financial report, featuring the Top 100 Global Airports and Airport Groups ranked by operating revenue, we highlight the Top 20 companies ranked by 2014 operating revenue published to date. Overall the ranking remains in largely the same order as 2013. Although some of the biggest players suffered a decline in revenues, such as Airports of Thailand and Infraero, many more saw significant gains, like Manchester Airports Group, Hong Kong International and Turkey's State Airports Authority.

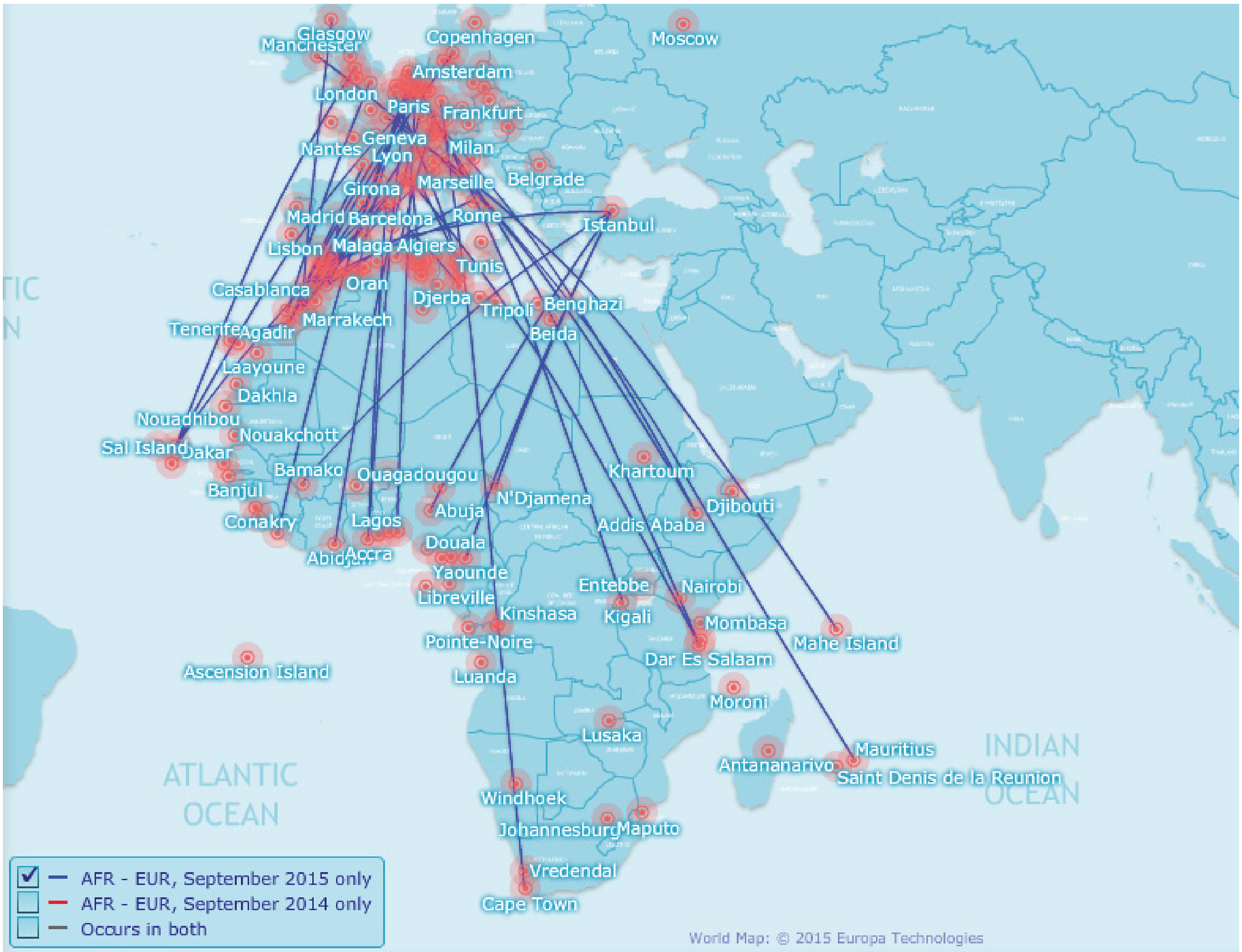
WORLD'S TOP 20 AIRPORT GROUPS BY REVENUE: 2014

Rank 2014	Airports operator	Country	Main airport	Revenue $ million	Change
1	**Heathrow Airport Holdings**	UK	LHR	4,425	14.4%
2	**Aena Aeropuertos**	Spain	MAD	4,172	7.0%
3	**Aeroports de Paris**	France	CDG	3,679	0.5%
4	**Fraport**	Germany	FRA	3,156	-0.1%
5	**Port Authority of New York & New Jersey**	USA	JFK	2,479	6.8%
6	**Hong Kong International Airport**	Hong Kong	HKG	2,111	10.6%
7	**Schiphol Group**	Netherlands	AMS	1,943	7.1%
8	**Narita International Airport**	Japan	NRT	1,834	-7.6%
9	**Avinor**	Norway	OSL	1,674	-0.7%
10	**Incheon International Airport**	South Korea	ICN	1,664	8.0%
11	**Flughafen Munchen**	Germany	MUC	1,582	0.5%
12	**Japan Airport Terminal**	Japan	HND	1,566	7.0%
13	**New Kansai International Airport**	Japan	KIX	1,388	10.0%
14	**State Airports Authority (Turkey)**	Turkey	IST	1,381	13.7%
15	**TAV Airports**	Turkey	IST	1,296	7.9%
16	**Infraero**	Brazil	GRU	1,267	-10.8%
17	**Beijing Capital International Airport**	China	PEK	1,241	5.5%
18	**Airports of Thailand**	Thailand	BKK	1,230	-9.9%
19	**Manchester Airports Group**	UK	MAN	1,185	10.7%
20	**Aeroporti di Roma**	Italy	FCO	1,061	14.0%

SOURCE: Flightglobal Note: 2014 financial results for Airports Authority of India and Changi Airport Group, which ranked 17th and 11th on 2013 revenues, have not been released at the time of going to press. The full Airport Group Financial Report will be published in the November issue of Airline Business.

AFRICA-EUROPE: NEW ROUTES

The snapshot below highlights the scheduled flights between Africa and Europe for new passenger routes in September 2015 against the same period in 2014. This is just one of the many features available on FlightMaps Analytics.



Notes: Data is based on one week of schedules data, September 2015 against September 2014.
Figures reflect airlines operating nonstop unrestricted scheduled passenger services.

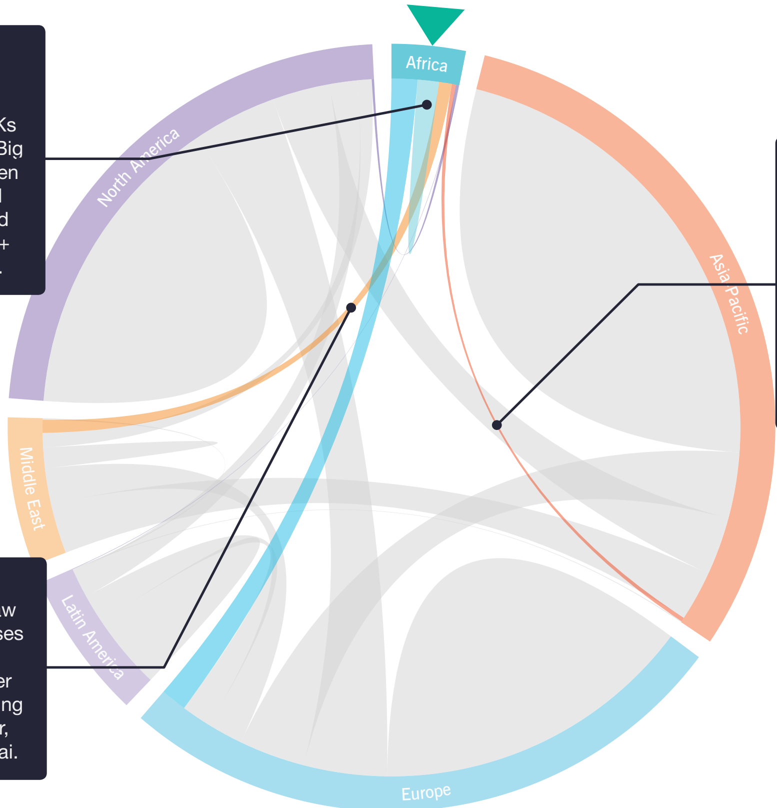
CAPACITY SNAPSHOT

Focus on Africa

September Capacity: 164bn ASKs/wk

6.5% vs Sep 2014

Compared with 2014, Ethiopian Airlines will increase its intra-region capacity by 53 million ASKs per week this September. Big gains can be found between its Addis Ababa hub and Brazzaville, Khartoum and Kano – all seeing a 1,000+ increase in weekly seats.



Capacity is down 6% between Africa and Asia-Pacific compared with last year. Cuts include South African Airways dropping flights to Mumbai and Beijing, though it will codeshare on Air China's new Johannesburg-Beijing flights from October.

Johannesburg, Addis Ababa and Zanzibar all saw significant capacity increases from the Middle East compared with September 2014, with Zanzibar receiving new traffic from Oman Air, Qatar Airways and Flydubai.

5.4bn ASKs/wk
▲ 3.7% YoY

Region	Weekly capacity ASK Millions	Change
Europe	2,071	▲ <1%
Intra-region	1,709	▲ 5%
Middle East	1,039	▲ 14%
Asia-Pacific	328	▼ 6%
North America	183	▼ 3%
Latin America	42	▼ 1%

Notes: Data is based on one week of schedules data, September 2015 against September 2014.
Figures reflect airlines operating nonstop unrestricted scheduled passenger services.

SOURCE: Innovata – part of Flightglobal

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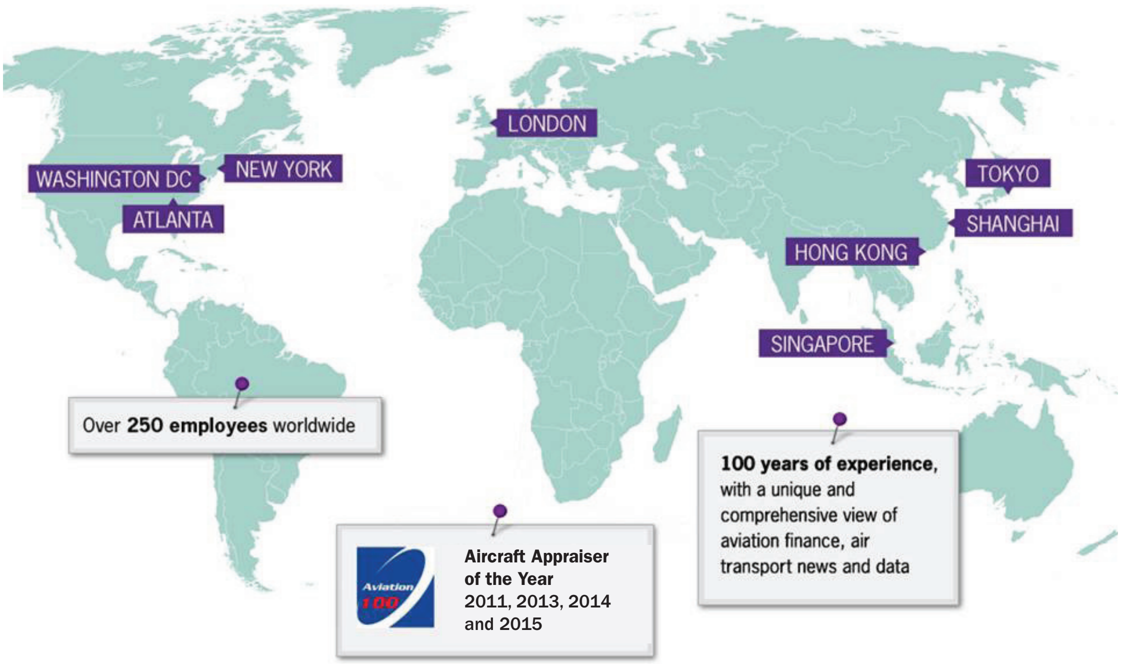

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