

Iași, 19th & 20th November, 2014



The Future of Aviation in Eastern Europe



www.ic-aviation.com




Airports & Airlines: Bridging the Gap Between Competing Needs

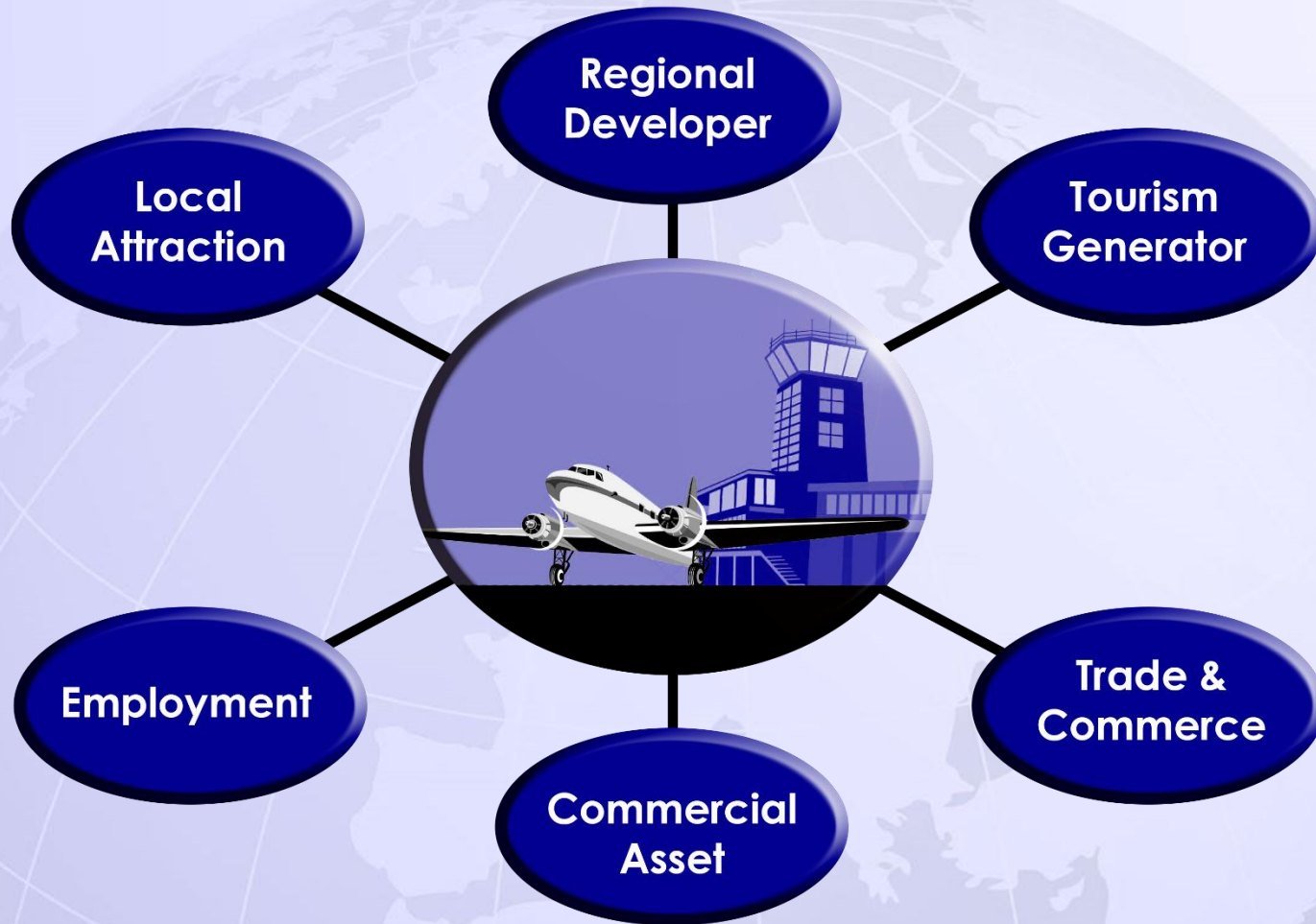
Economic Impact of Aviation

- **440 Airports**
- **1.4bn passengers p.a.**
- **5.1 million jobs**
- **€365 billion direct contribution**
- **2.4% of European GDP**

Economic Impact of Airports

 <p>ACT EUROPE AIRPORTS COUNCIL INTERNATIONAL</p>	<u>Airport Contributions</u>	
	Frankfurt Airport	1st employment site in Germany
	Paris-CDG	90k direct jobs, 270k indirect
	Moscow	29k direct jobs
	Athens	2.14% of Greek GDP
	Birmingham	130 companies established
	Brussels Charleroi	-60% unemployment

Benefits of Regional Airports



Profit-Less Europe?

European Airports:

“43% Loss

Making”



European Airlines:

“Profitability Well

Below Industry

Average”



Airport Competition

63% of European citizens live within
a **2 hours** drive of at least **2 airports**

Route Churn: 2,941 route openings
v 1,936 route closures ✂

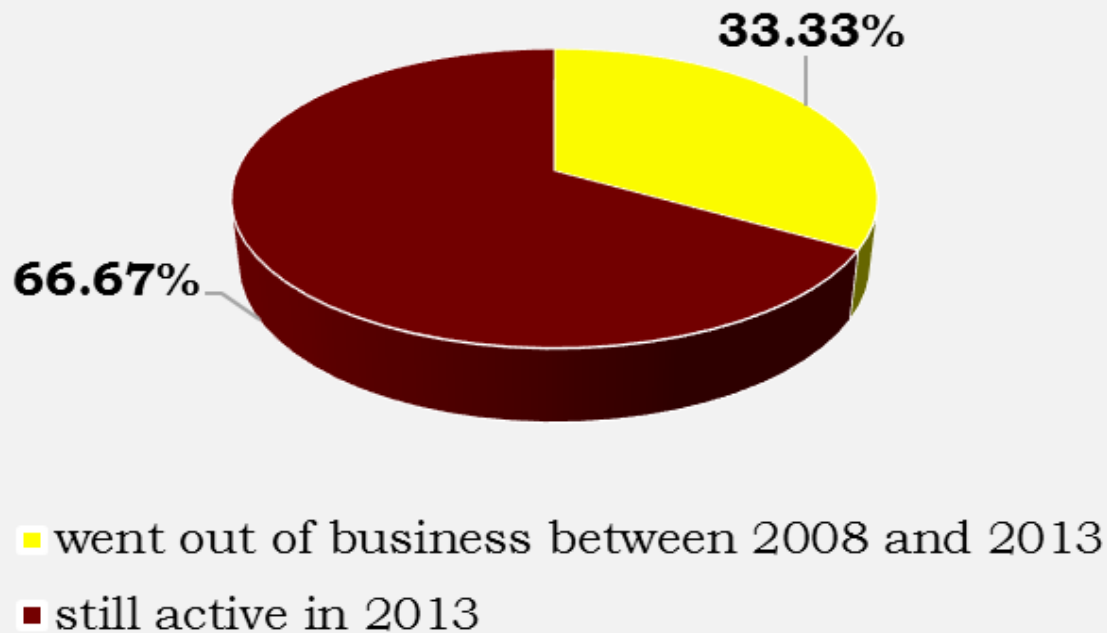
**Route closure impact = only 47% of
recovered capacity within 3 years.**

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Regional Carriers

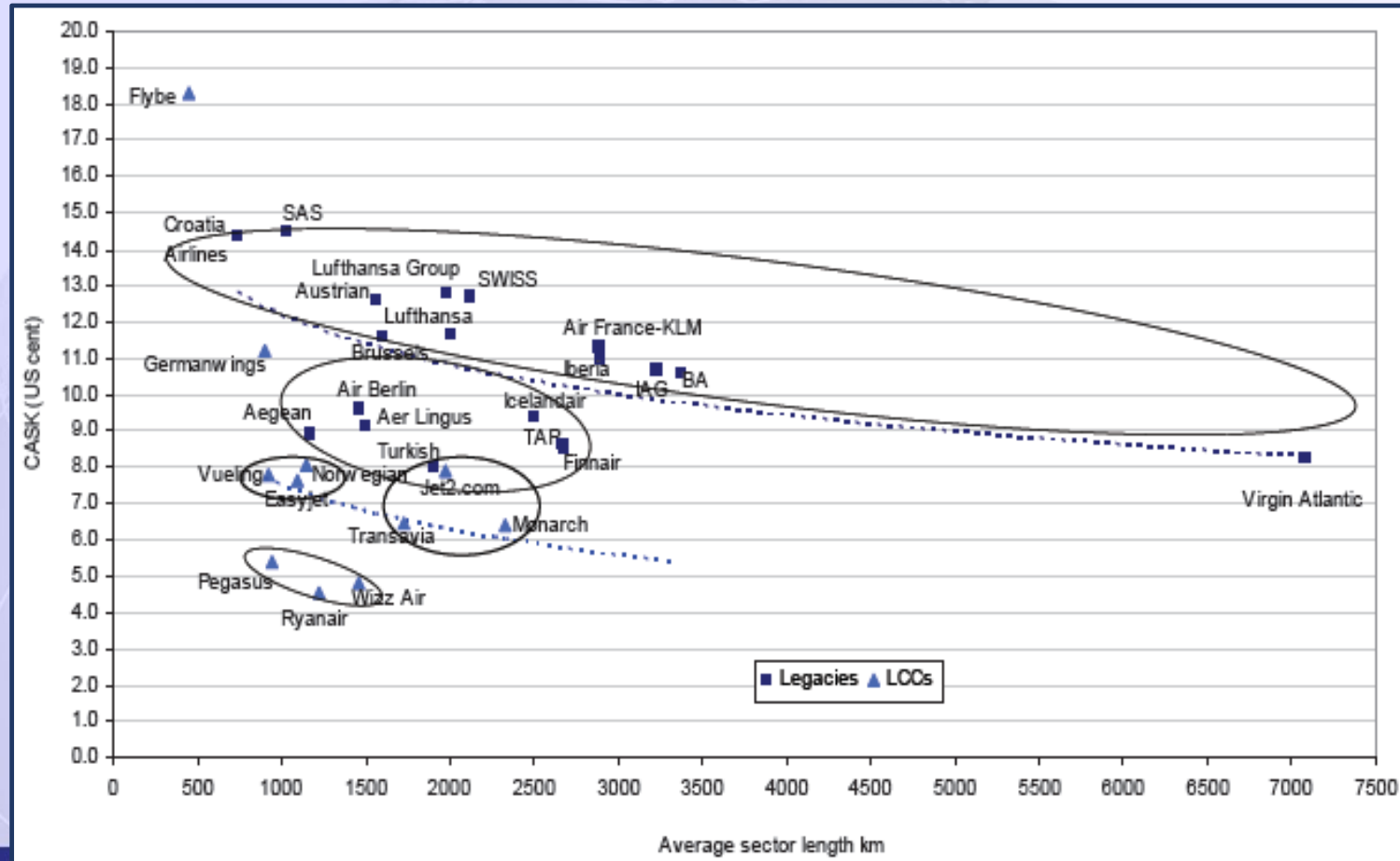


Regional Airline Development: 2008-2013
data source: ch-aviation



Source: ch-aviation

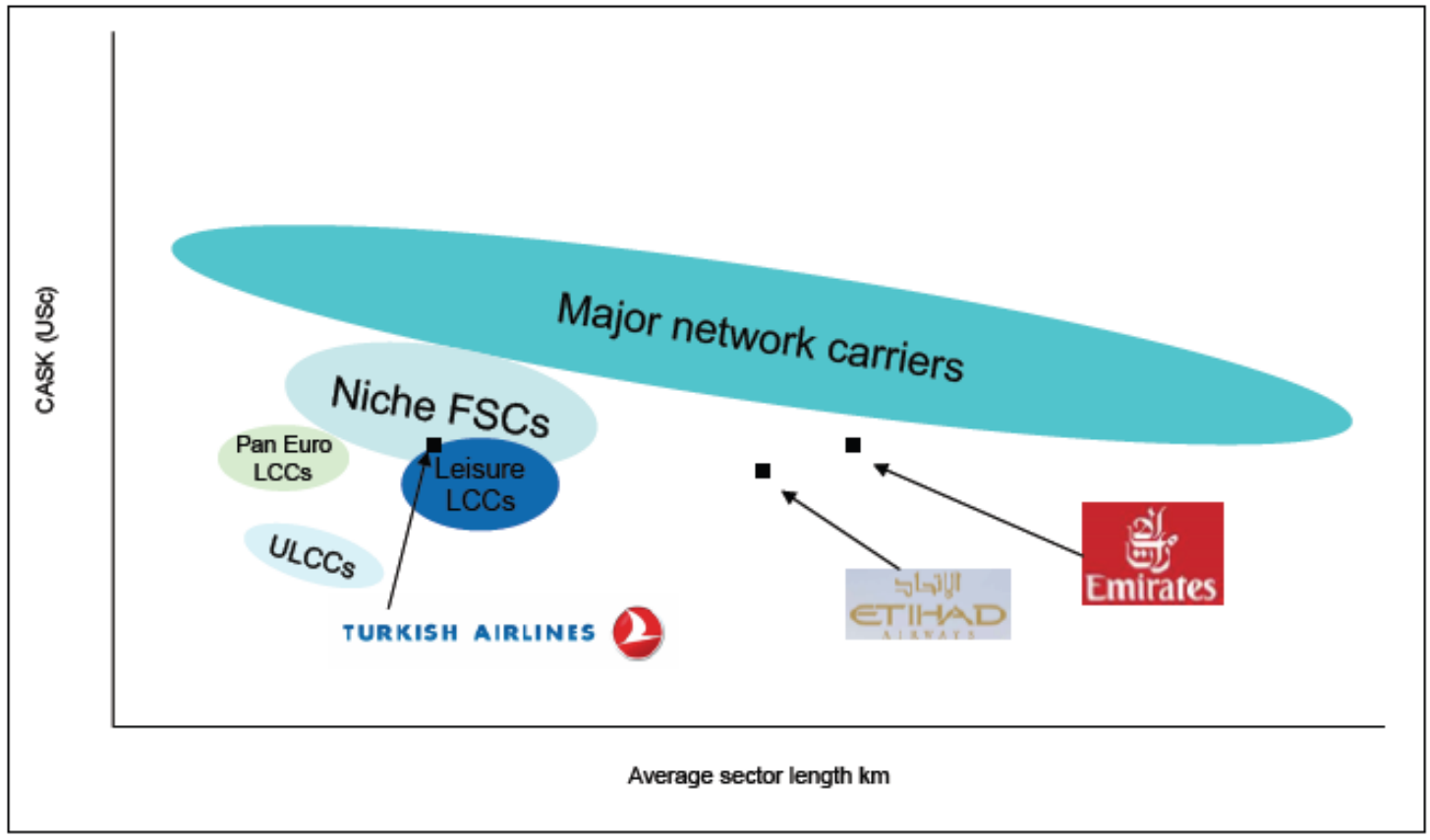
EU Airline Competition



Source: CAPA – Centre for Aviation

EU Airline Competition

Cost per available seat kilometre (CASK, US cents) vs average sector length 2012



Source: CAPA – Centre for Aviation

Diversification is Key



Top 10 Carriers

1. Ryanair
2. easyJet
3. Flybe
4. Thomson Airways
5. Monarch Airlines
6. Jet2
7. Thomas Cook Airlines
8. British Airways
9. Lufthansa
10. Emirates

Diversification is Key



GENEVE
AÉROPORT

Top 10 Carriers

1. easyJet
2. SWISS
3. Lufthansa
4. Air France
5. British Airways
6. KLM
7. Brussels Airlines
8. TAP Portugal
9. Darwin Airline
10. Turkish Airlines

Diversification is Key

Top 10 Carriers

1. TAROM
2. Wizz Air
3. Blue Air
4. Lufthansa
5. Austrian
6. Turkish Airlines
7. Air France
8. KLM
9. Alitalia
10. British Airways



Diversification is Key

Vilnius Airport



Top 10 Carriers

1. Wizz Air
2. Ryanair
3. Air Baltic
4. Lufthansa
5. Air Lituanica
6. SAS
7. LOT
8. Finnair
9. Aeroflot
10. Ukrainian



**Market Leaders in
Aviation Development**

Thank you!

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