

Iași, 19th & 20th November, 2014



# The Future of Aviation in Eastern Europe



[www.ic-aviation.com](http://www.ic-aviation.com)




# **Airports & Airlines: Bridging the Gap Between Competing Needs**

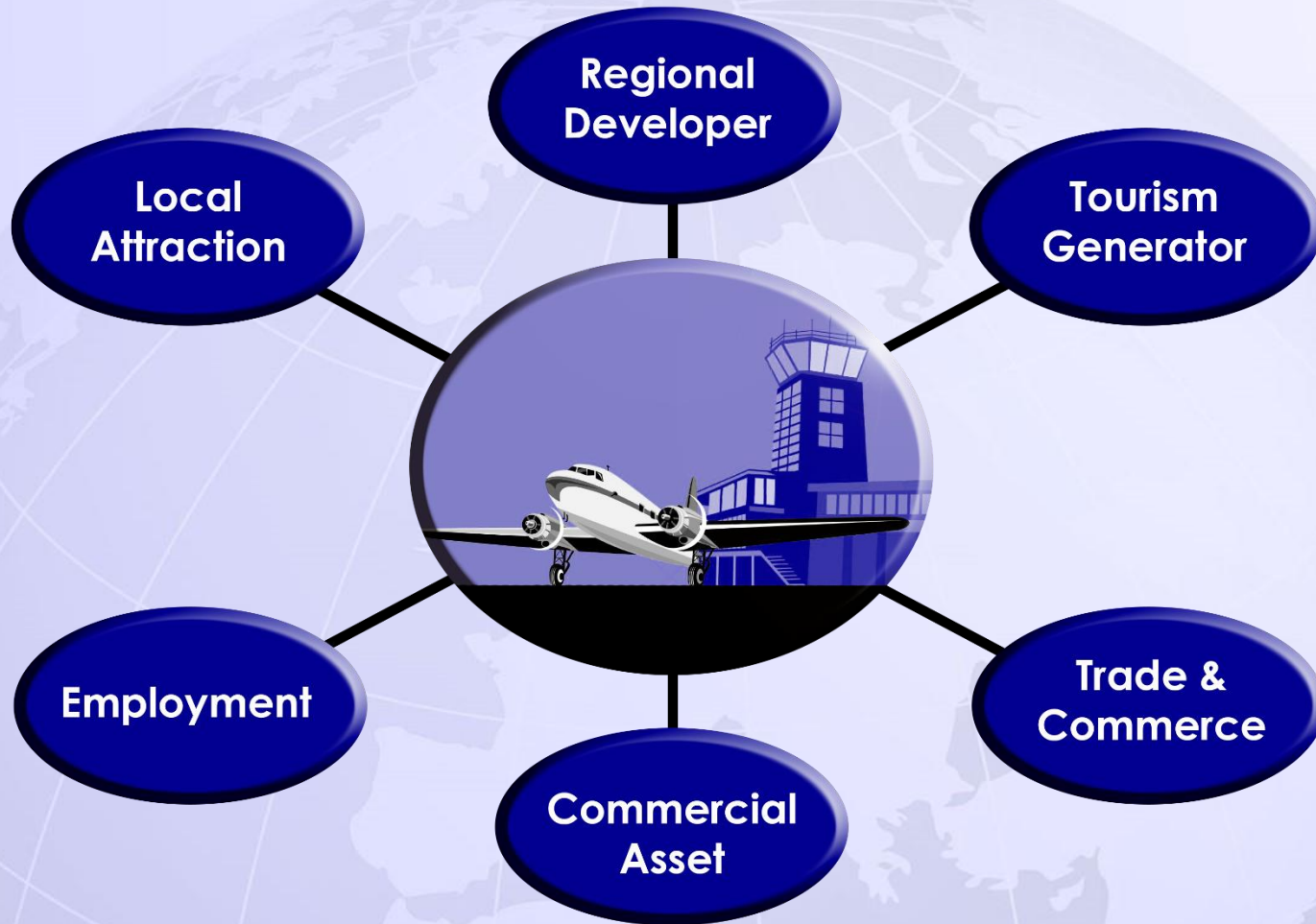
# Economic Impact of Aviation

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

# Economic Impact of Airports

	<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** ✂

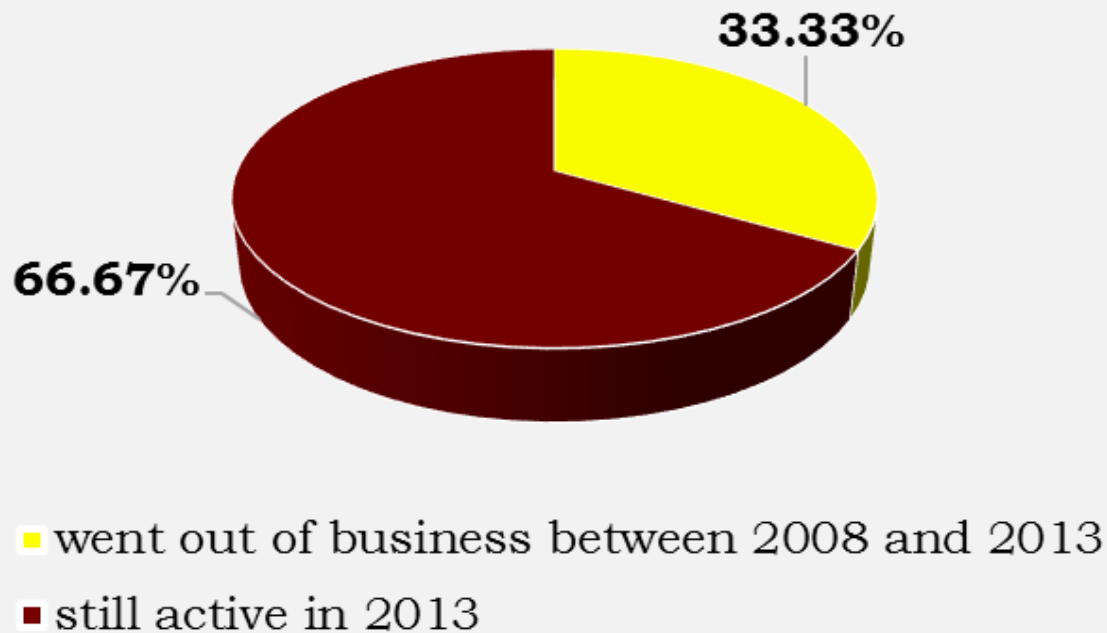
**Route closure impact = only 47% of  
recovered capacity within 3 years.**

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# Regional Carriers



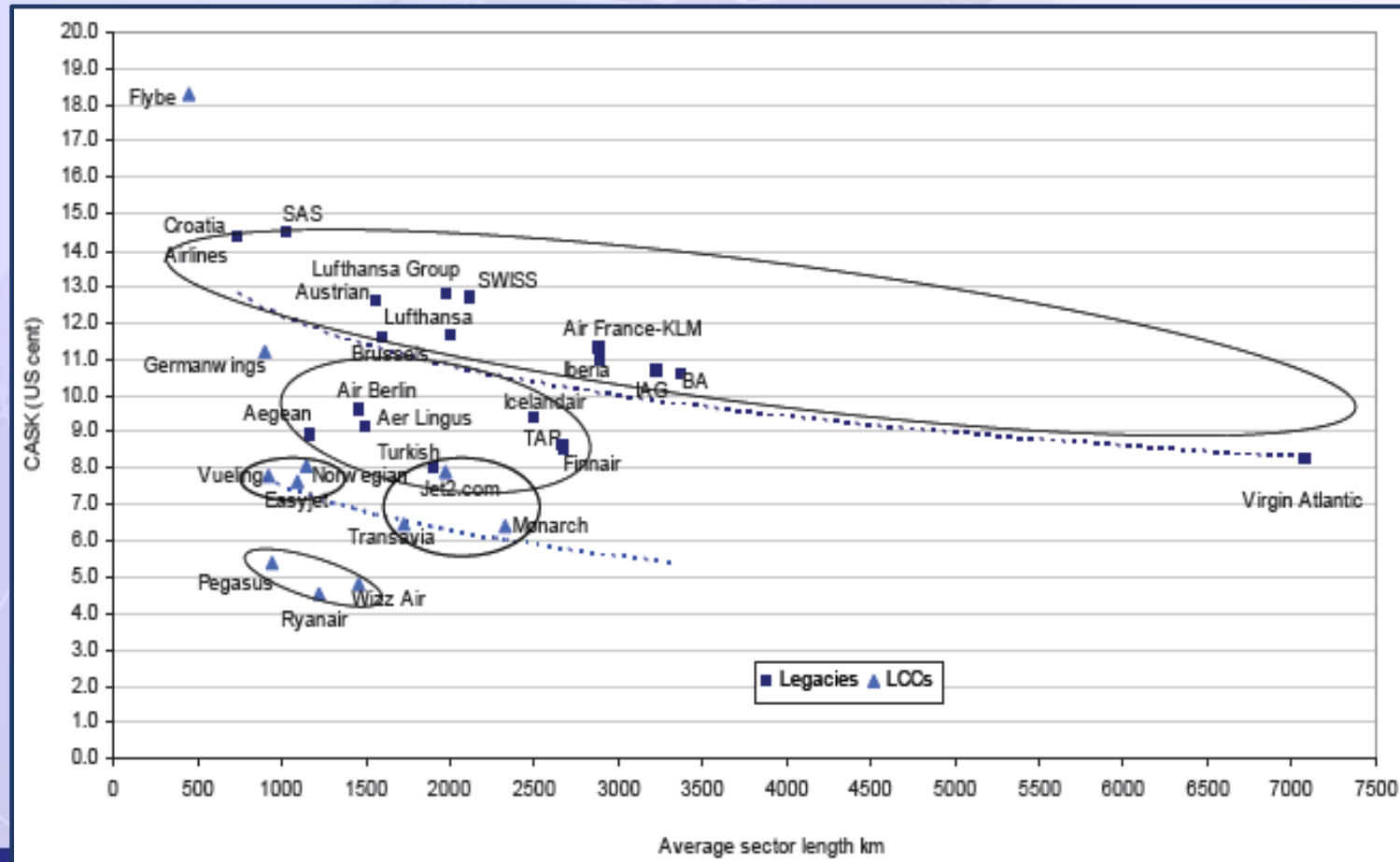
Regional Airline Development: 2008-2013  
data source: ch-aviation



Source: ch-aviation



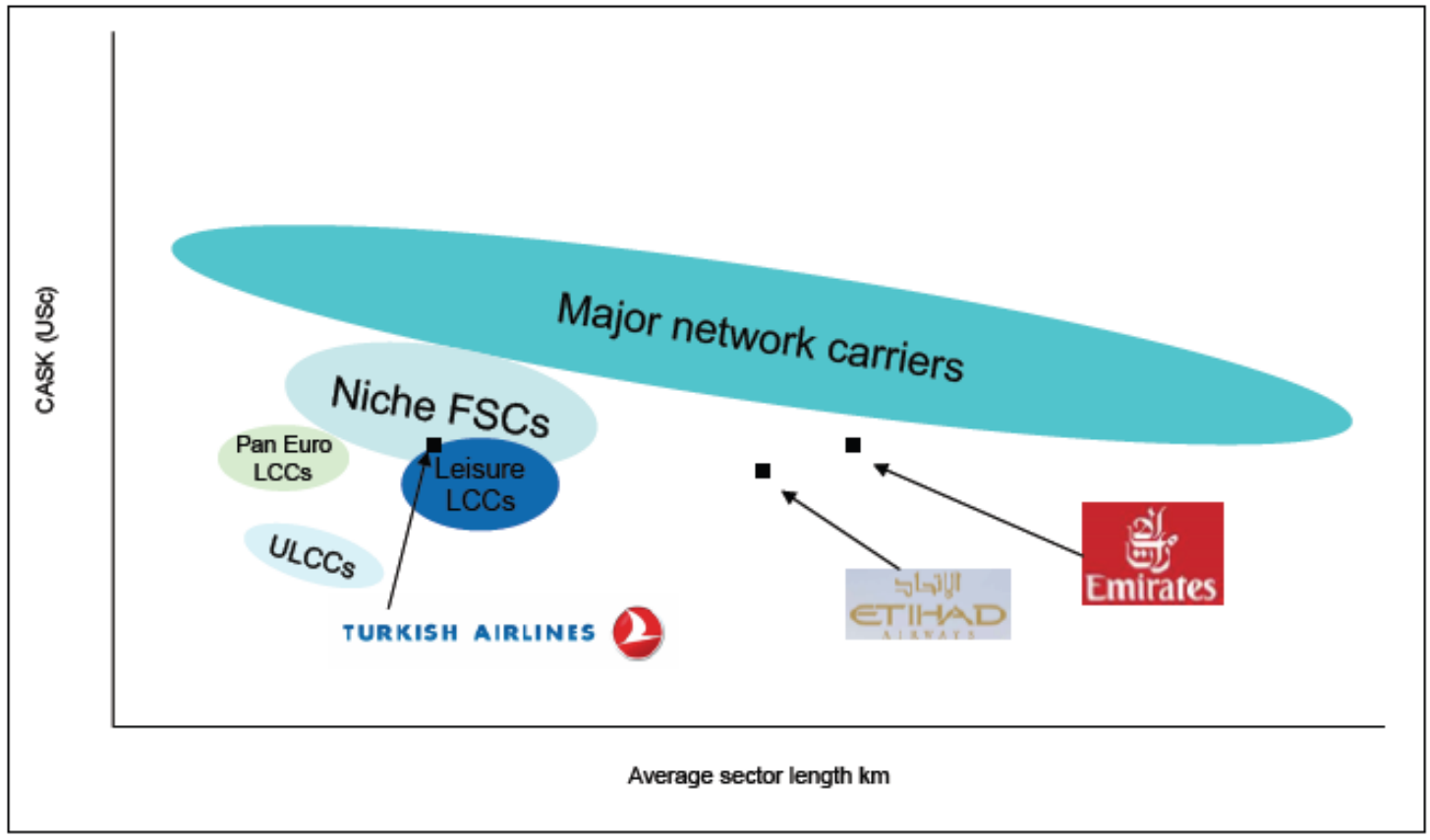
# EU Airline Competition



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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