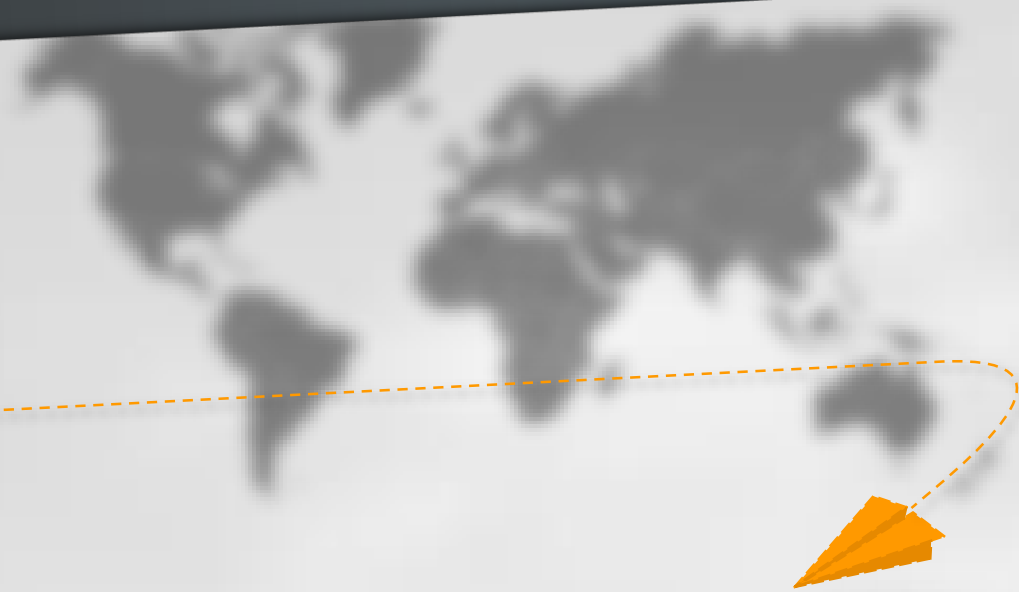


# ADLUX

## **BUSINESS AVIATION INSIGHT** *October 2015*



**WINGX**  
ADVANCE

***INSIGHT Issue: October 2015***  
*Hamburg November 10th, 2015*

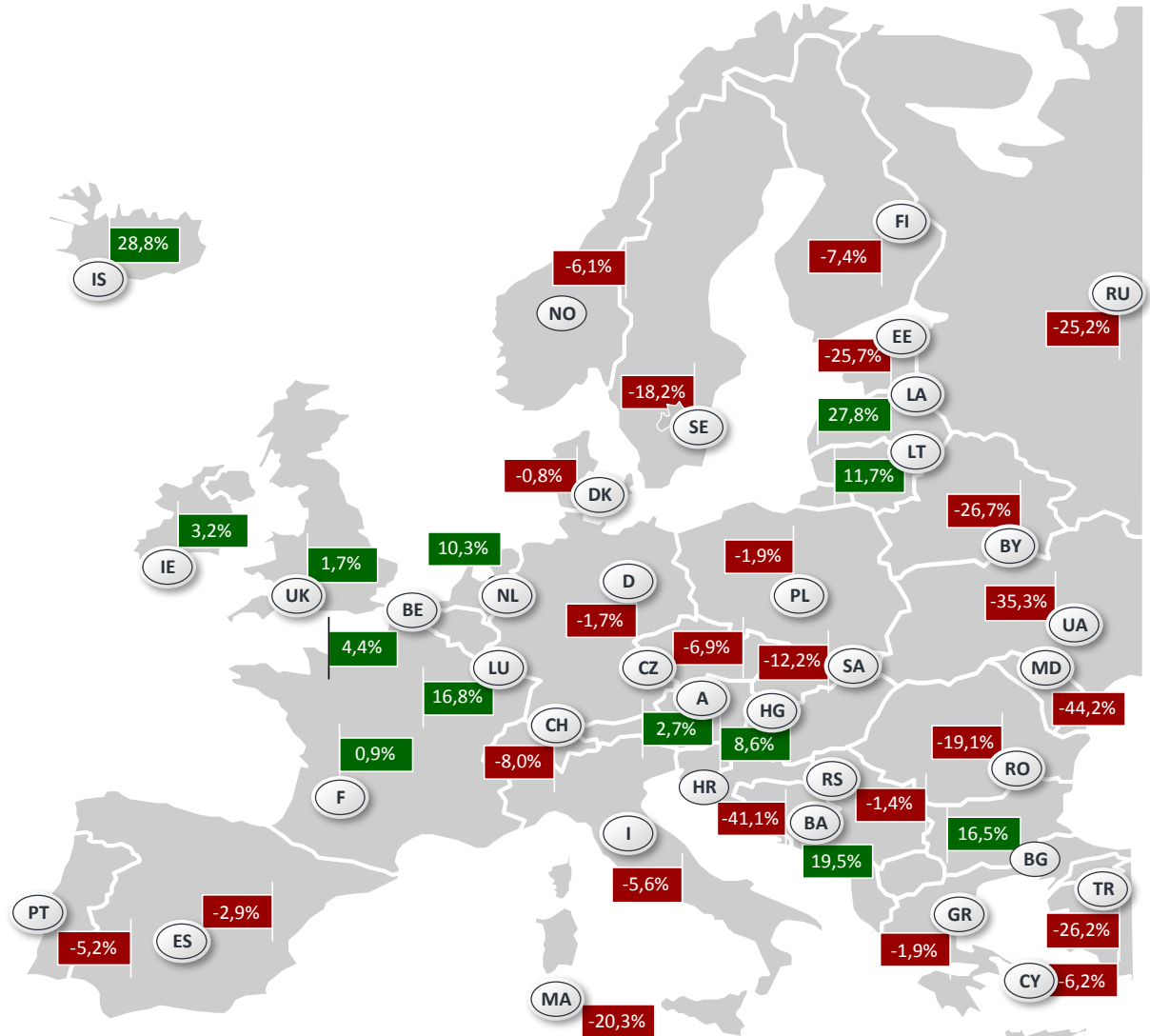


**AIRCRAFT  
ACTIVITY  
TRACKER**

# Flight departures across Europe

Some growth in Western Europe was offset by declines in Southern and Eastern Europe. Notable flight declines in peripheral Europe: CIS, Scandinavia, Turkey.

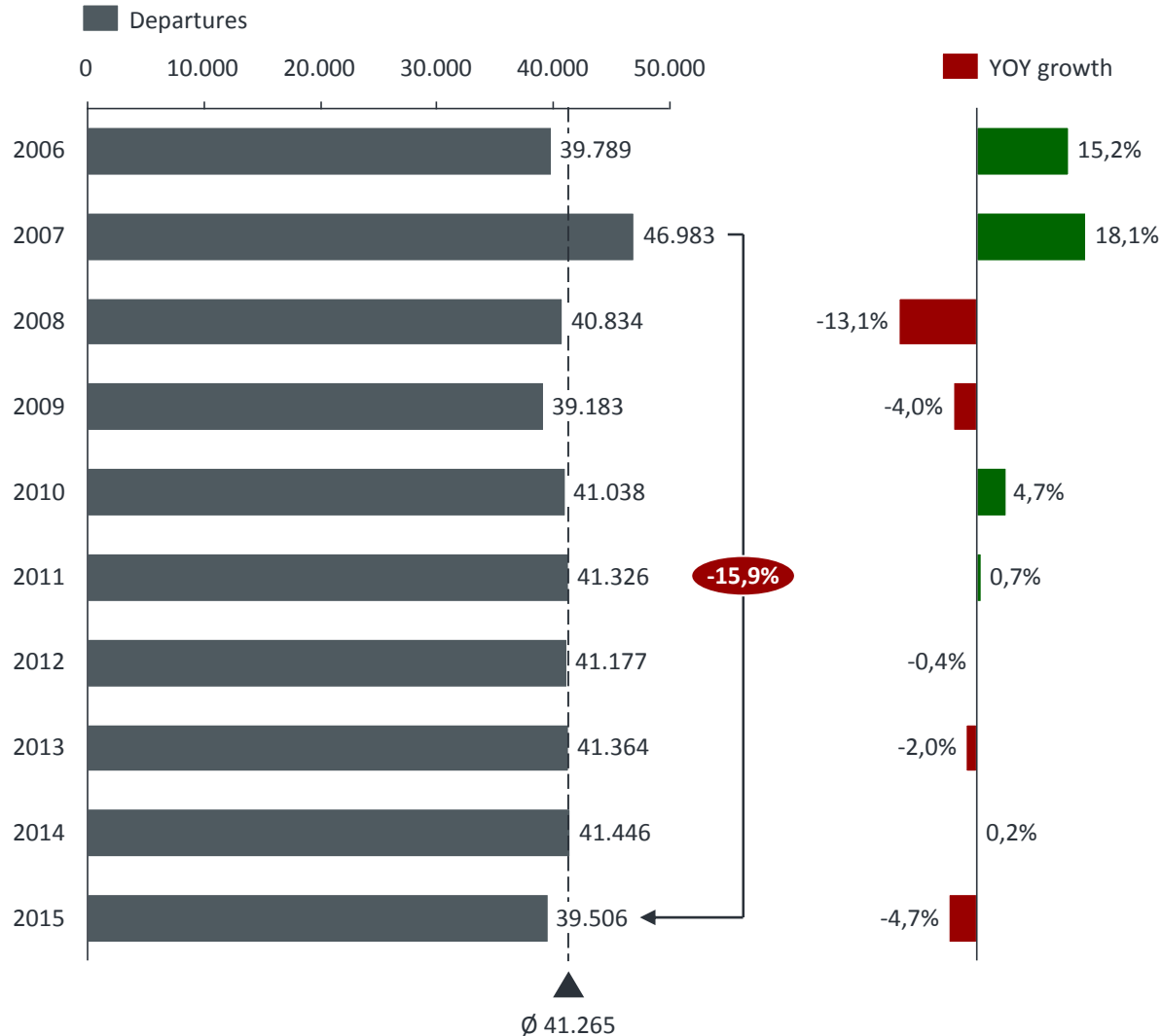
**Total Europe: -4,7%**  
**October 2015 YOY**



# How did October 2015 compare to previous years?

Flight activity in October 2015 was lower than any October since the 2009 trough of 39,183 flights, and 16% below the pre-Recession peak of 46,983 flights.

## October

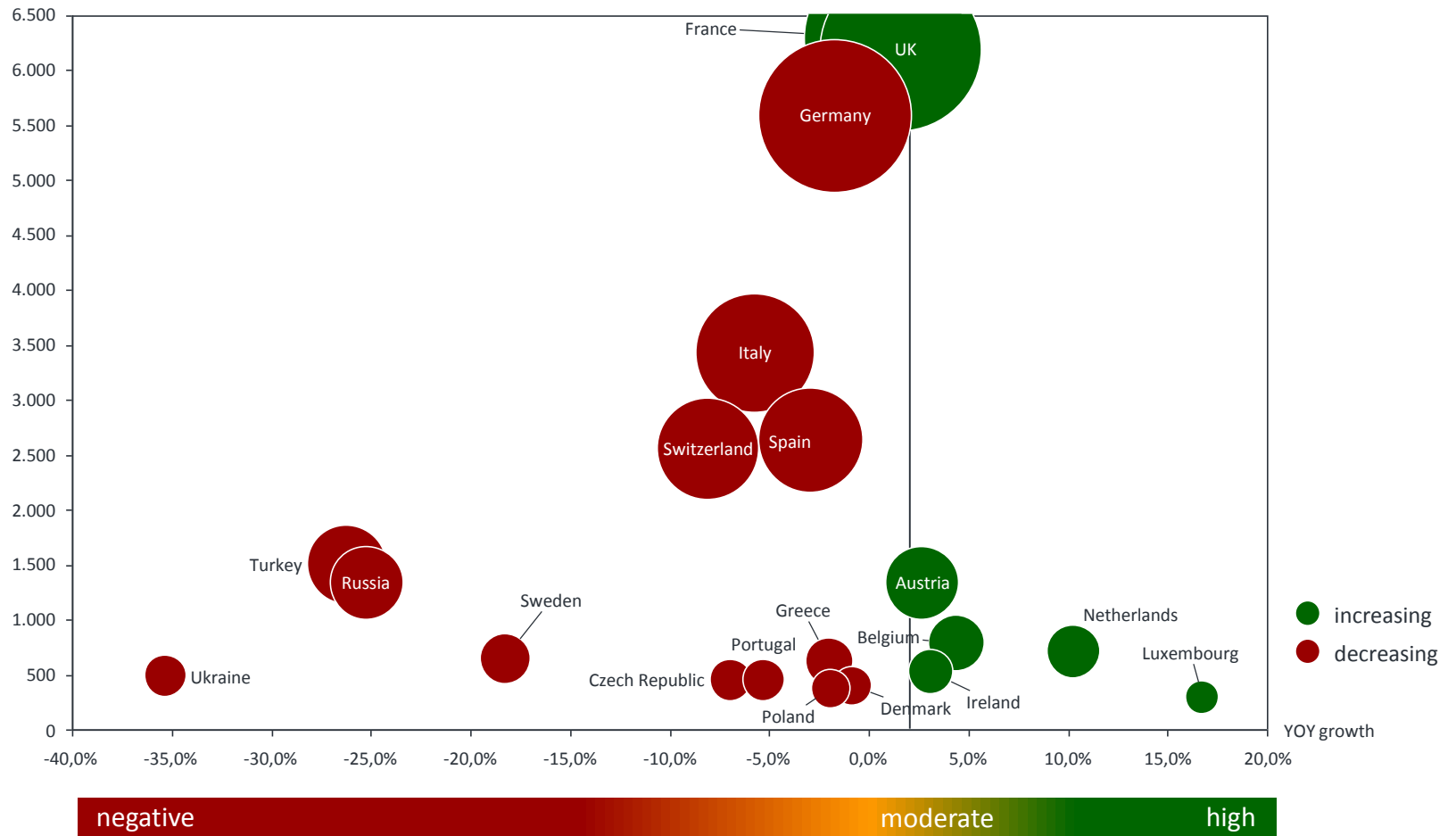


# Top country markets activity in October YOY

Growth in activity in UK and France somewhat offset declines in Germany, Italy, Switzerland and Spain. Greece bounced back YOY, Russia and Turkey still declining at a rate of >25% YOY.

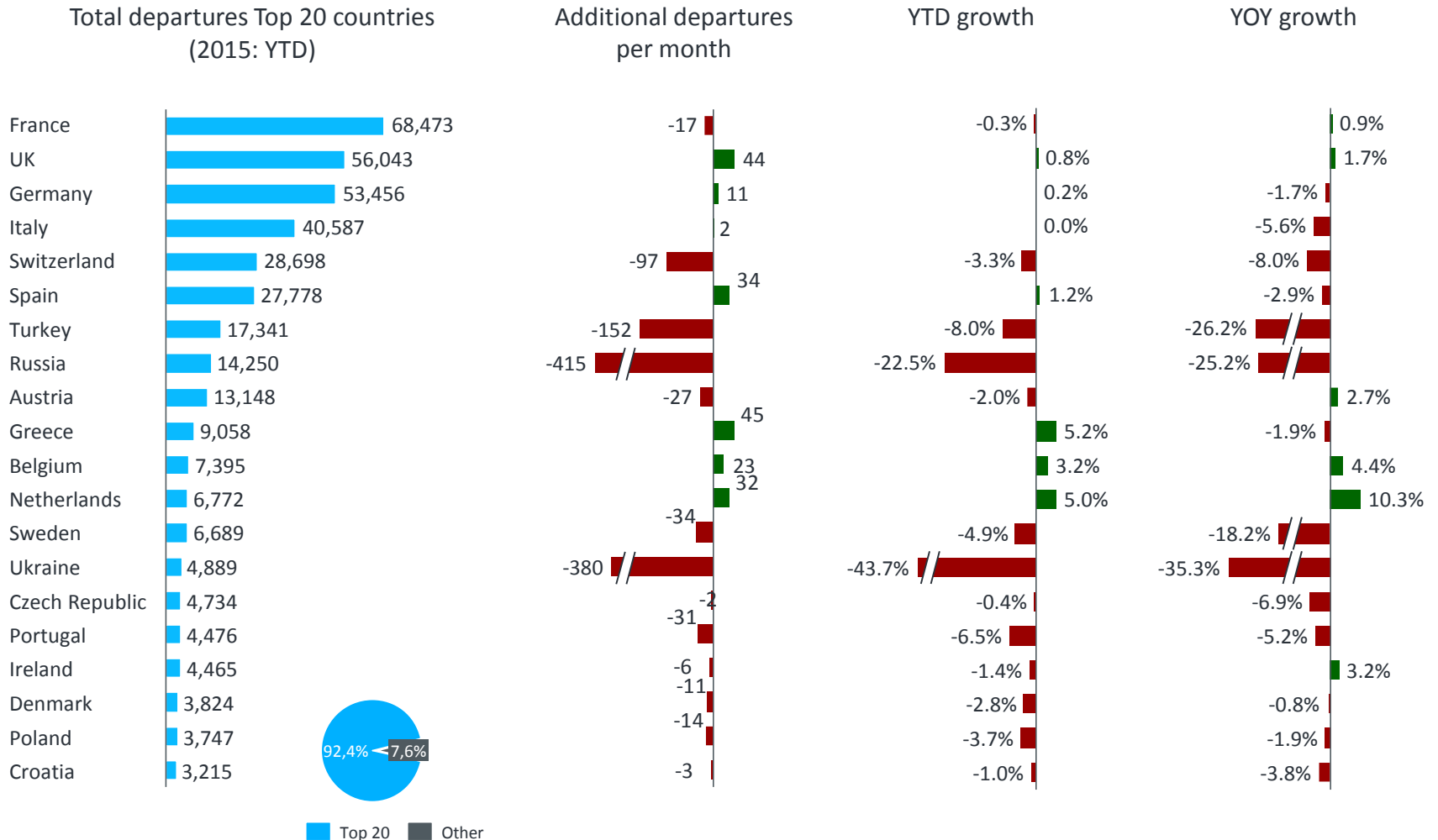


Departures October 2015



# European growth pattern in Top 20 countries YTD

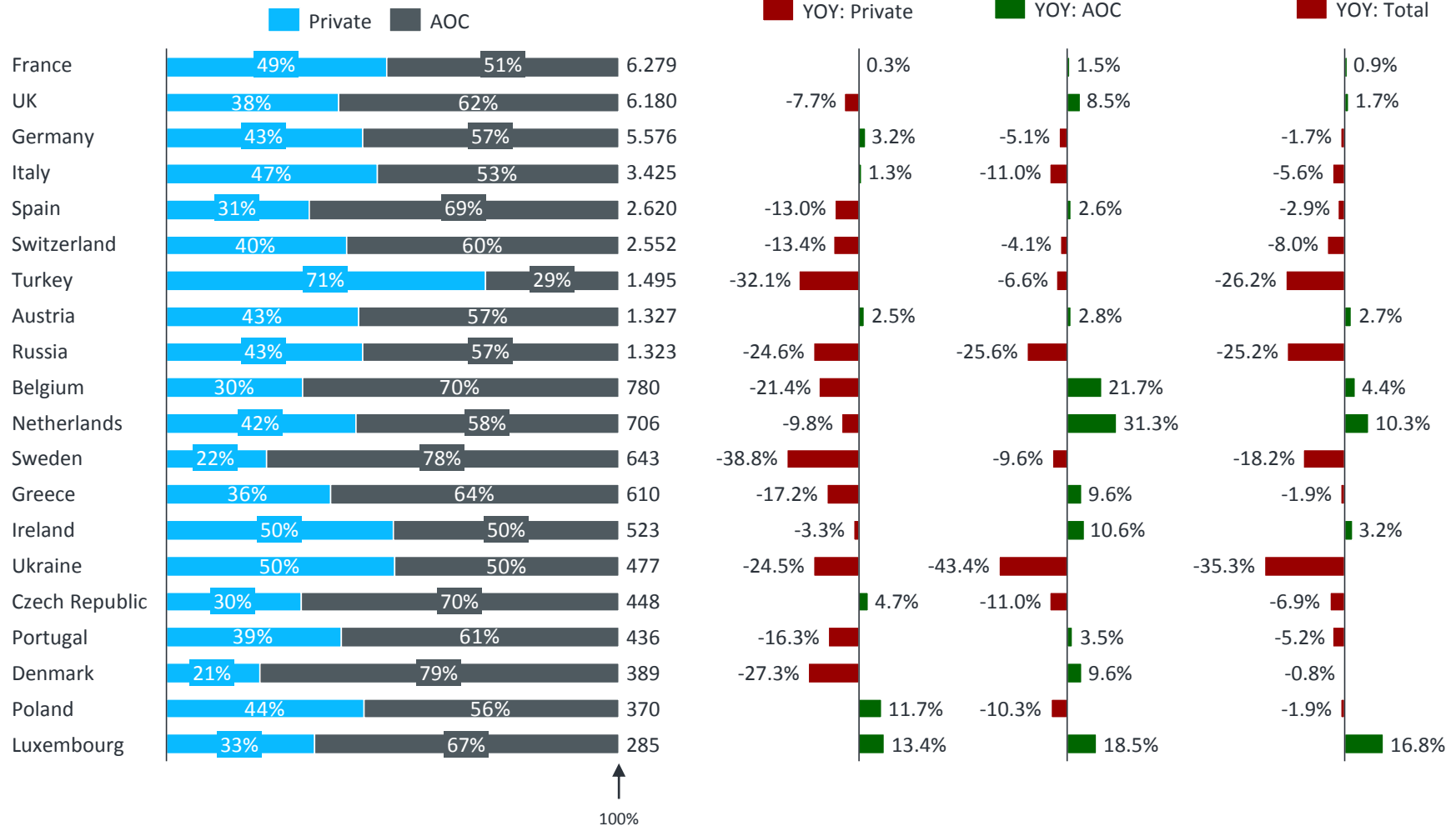
The two top 10 countries showed growth in flights this month, but several secondary markets lost >20% YOY. YTD 2015 activity is still just about up for 4 of the top 6 countries in Europe.



# European growth pattern Top 20 by flight mission

Private flight activity declined in all top 10 markets except France, Germany and Italy. In AOC activity, Italy was the biggest faller, France was up, and UK activity grew significantly.

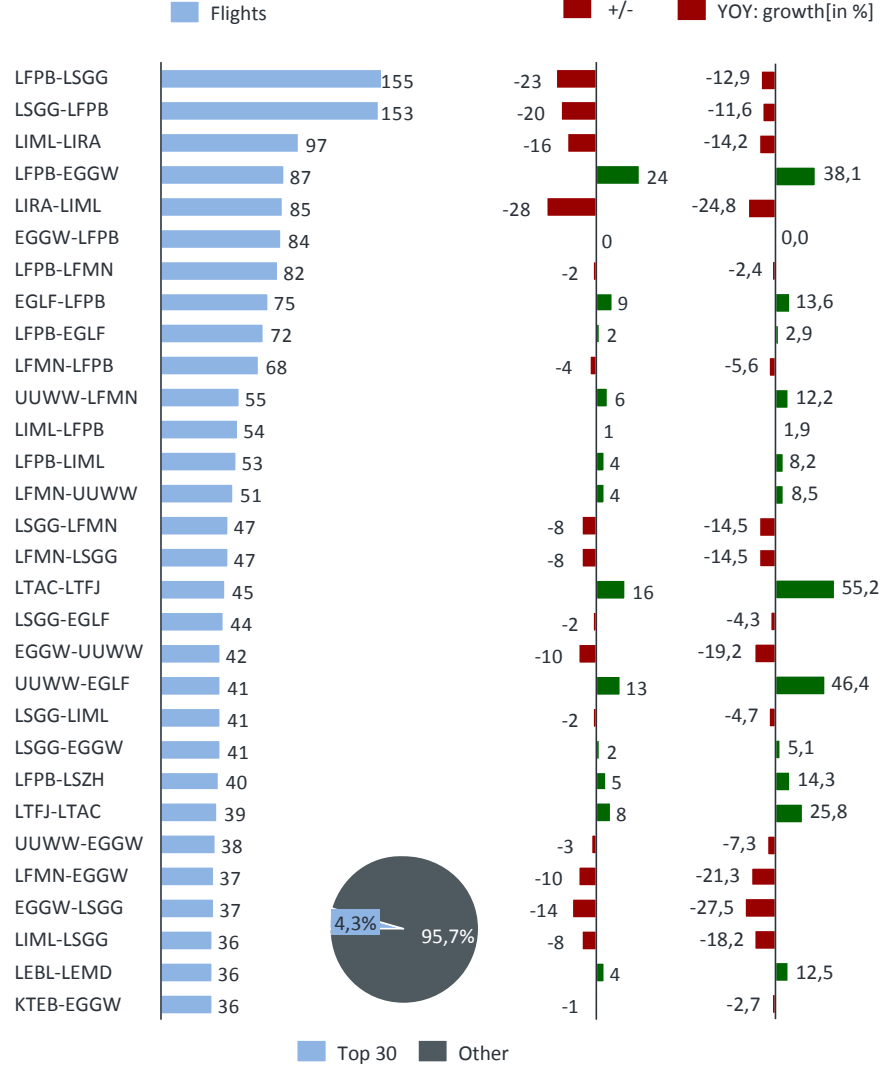
Total departures Top 20 countries  
(October 2015)



# Top 30 City Pairs in October

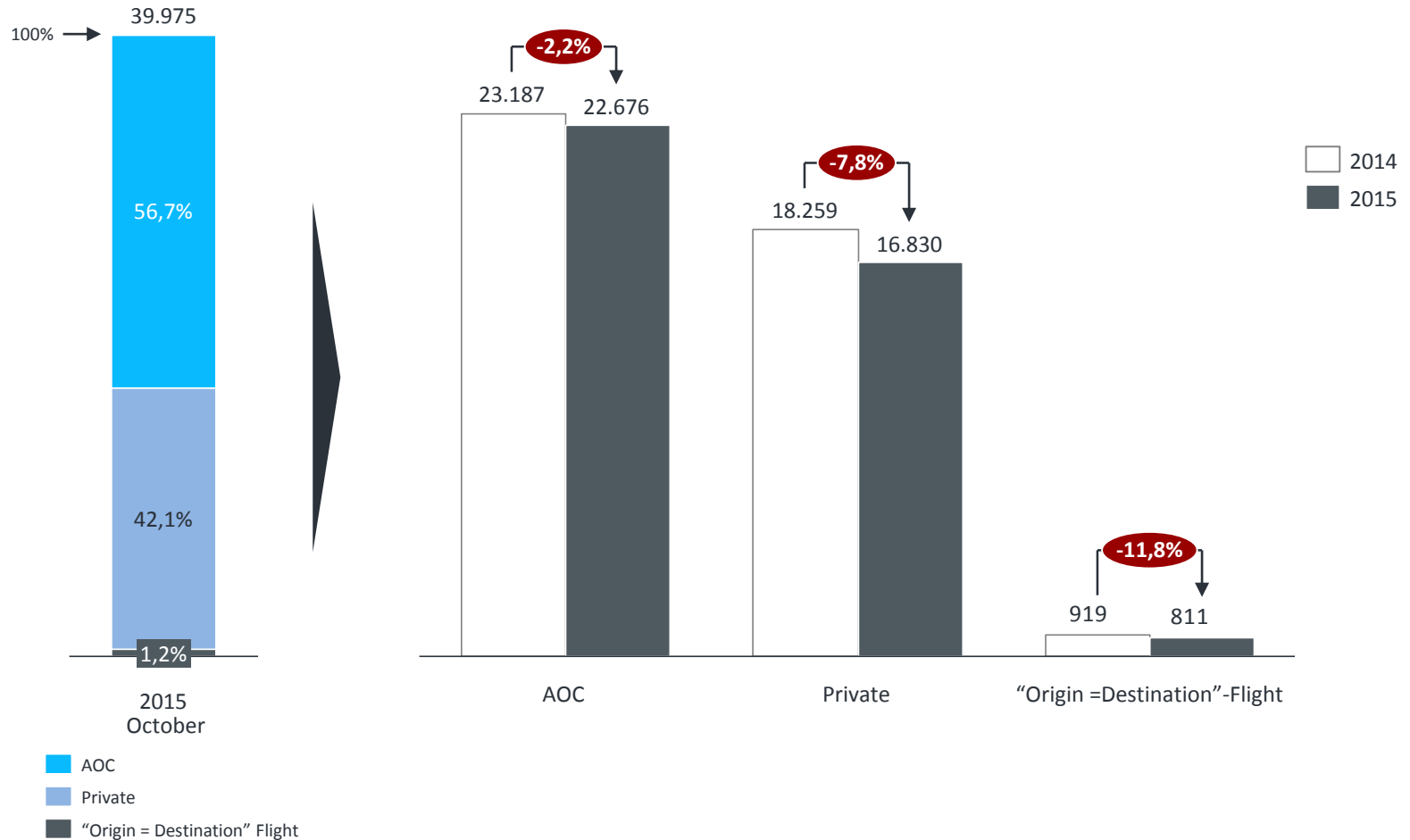
There were 308 flights between LFPB and LSGG, a fall of 43 flights YOY. A similar decline in activity between LIML and LIRA. A big increase this month, +24 flights, from LFPB to EGGW.

## Top 30 City Pairs – October 2015



# Activity by flight filing (mission type)

There were 22,676 AOC business jet flights operated in October, 57% of activity in October, decreasing 2.2% YOY. Private flights fell much further this month, declining 8% YOY.



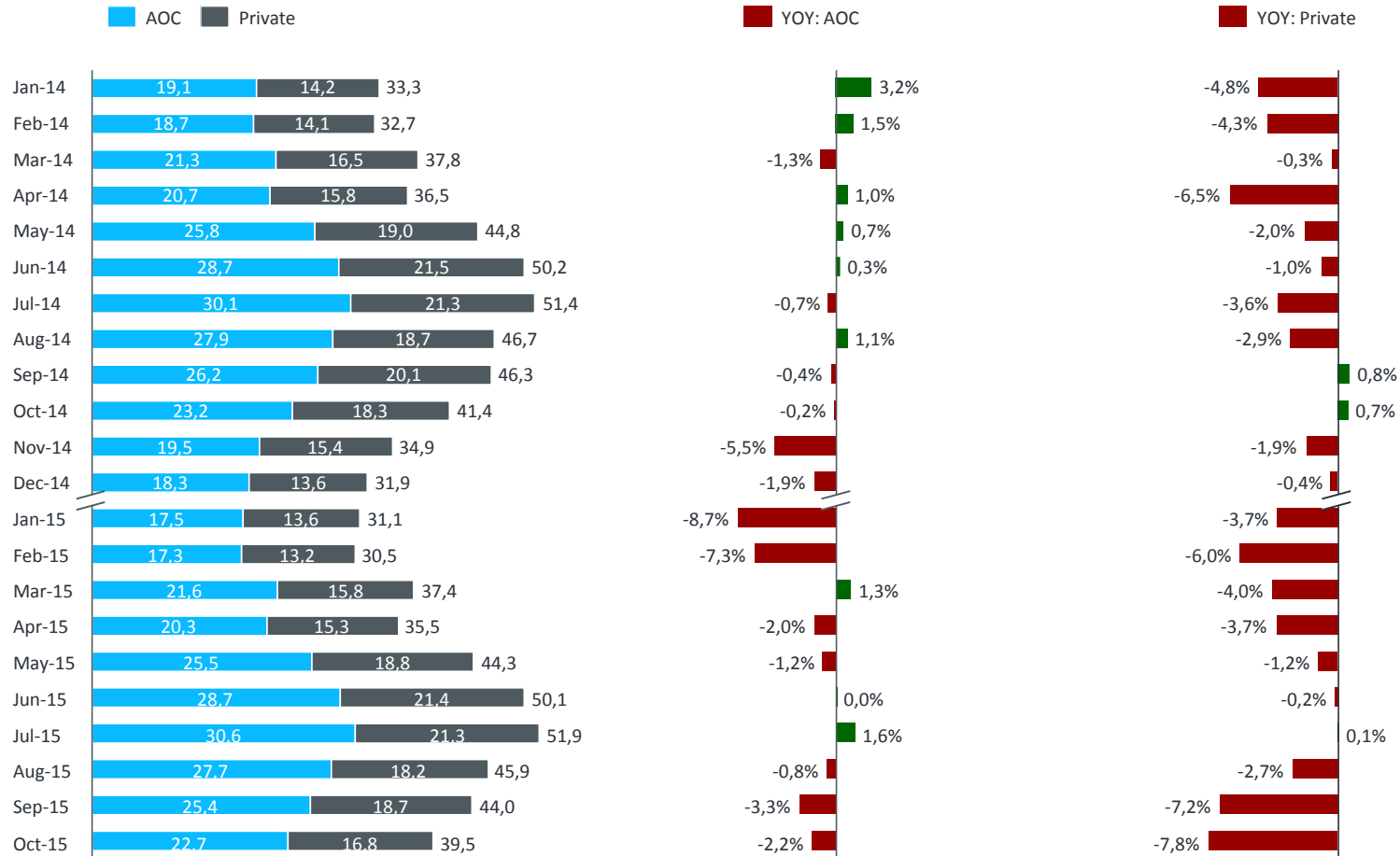
Note:  
Origin=Destination flights (mostly training) not shown on other pages



# Monthly departure trends by mission type

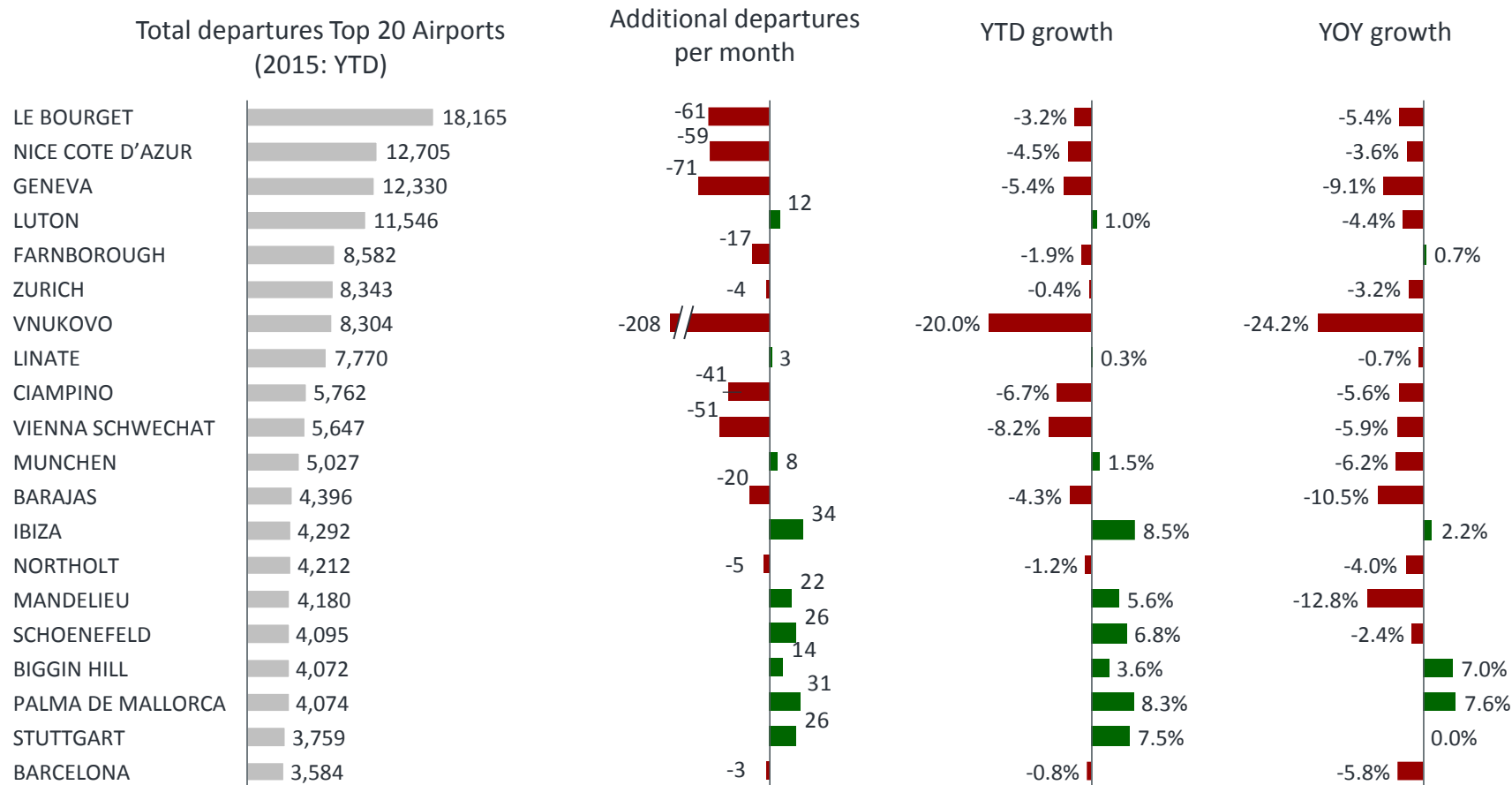
A bumpy pattern in AOC activity this year, mainly YOY declines but not severe. Private activity has fallen off abruptly since the summer, October the largest decline YTD.

Thds. of departures



# Top Airport flight departures in October and YTD

The busiest 4 airports all saw declines in activity in October, Geneva falling most, with YTD declines averaging 71 departures per month. Gains for Farnborough this month, and Luton is up YTD.

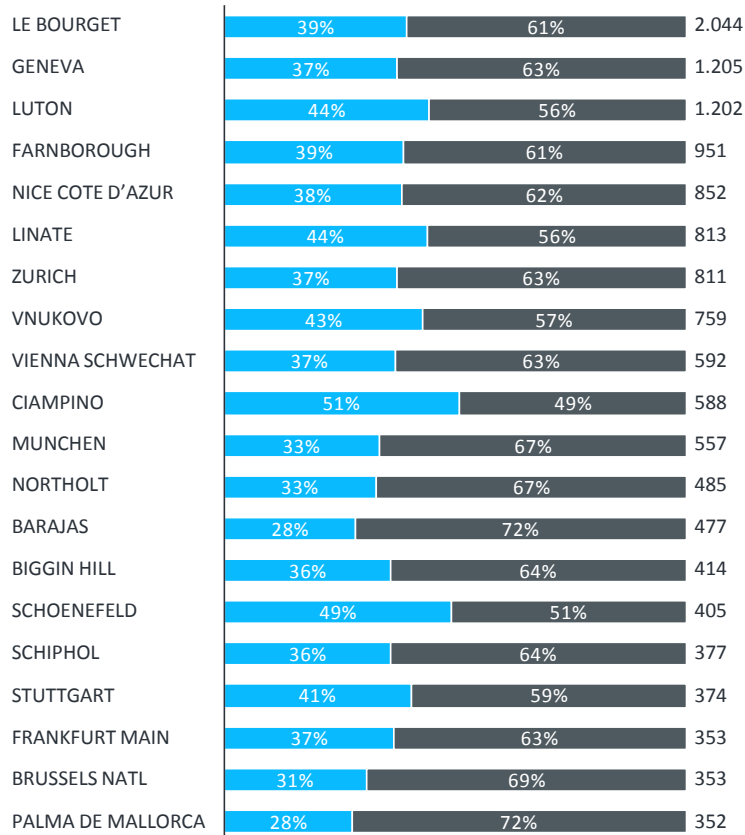


# Top 20 Airports activity by mission profile

Both Le Bourget and Luton up in AOC flights, Linate, and especially Ciampino and Vnukovo declined heavily. For Private activity, slight growth at Farnborough, big decline at Geneva.

Total departures Top 20 Airports  
(October 2015)

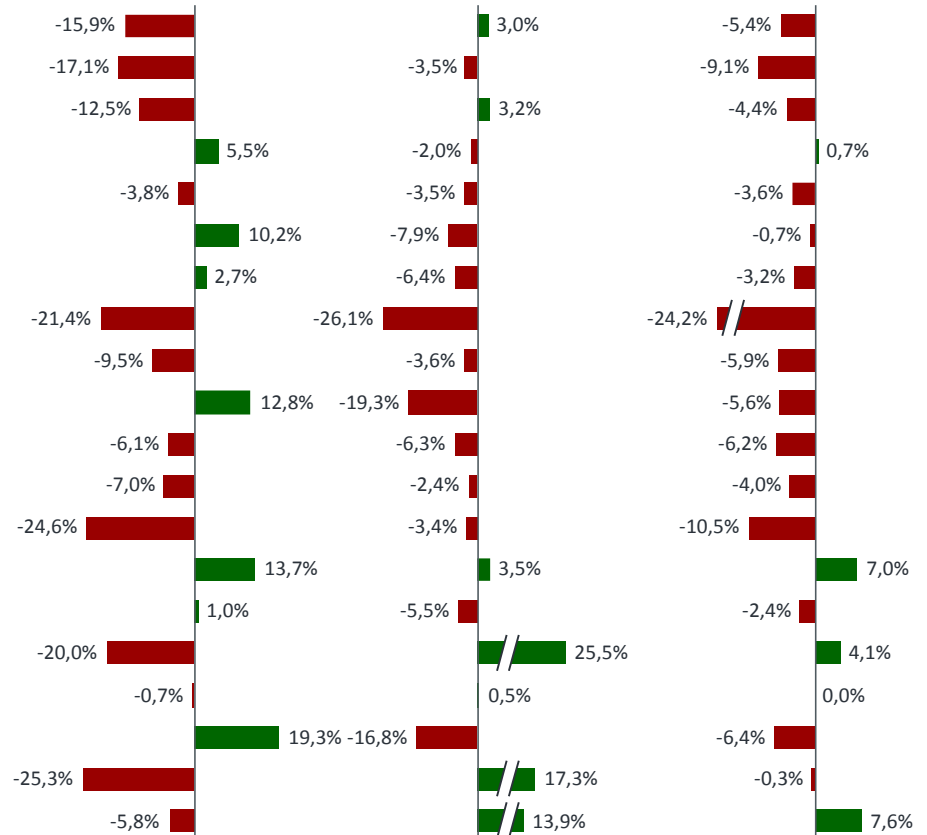
Private Commercial / AOC



YOY growth  
Private

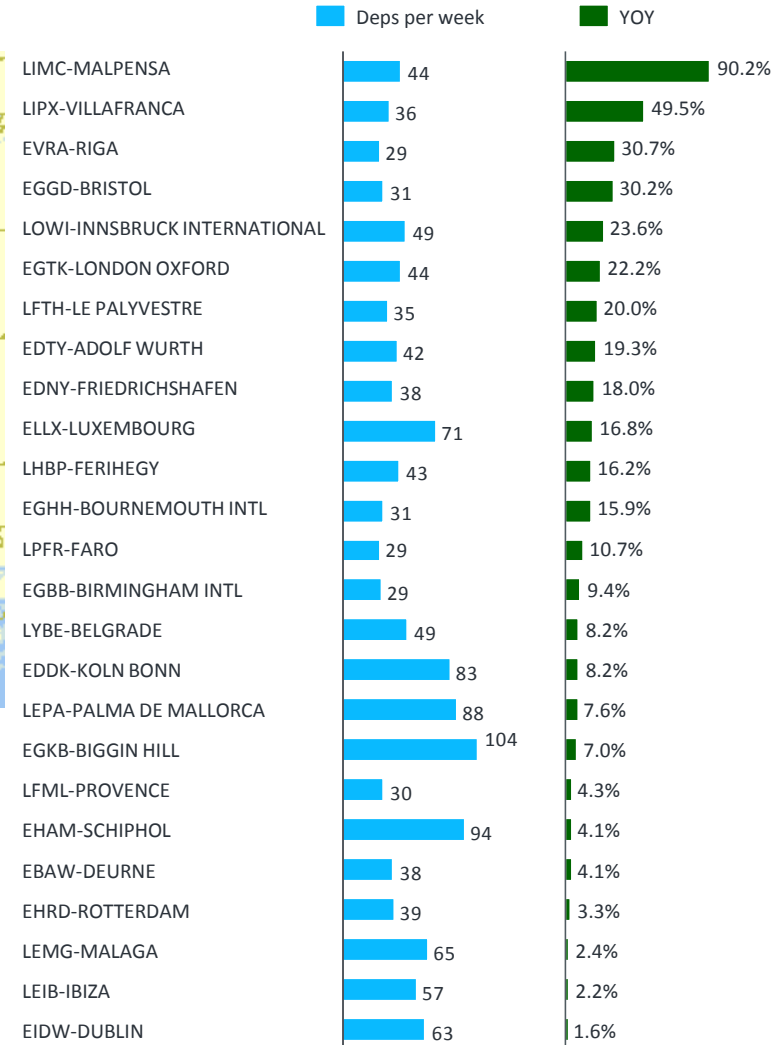
YOY growth  
AOC

YOY growth  
Total



# Best performing airports by activity October 2015 YOY

Some busy airports saw significant gains in YOY activity: 7% growth at Biggin Hill, 17% at Luxembourg, 4% at Schiphol. The largest YOY increase in October was at Malpensa, +90%.



Note:  
 ■ Threshold for consideration in this analysis is more than 10 departures per week

## Executive Summary: October 2015

- There were 39,505 business jet departures in Europe in October 2015, a 4.7% decline, year on year, taking YTD trend to -2.6% compared to 2014. There were also 14,000 Turboprop sectors, -4% YOY, and 13,000 Piston sectors, up 1% YOY.
- Flight activity in Europe's leading 2 business jet markets, France and UK, was up this month, with UK gaining 8% in AOC activity. Austria, Belgium, Netherlands and Ireland also saw some growth this month. 4 of the top 6 European countries are up YTD.
- The declines this month came in Southern Europe mainly, with sizeable decreases in Italy, Spain and Switzerland. There were also some heavy declines in Scandinavia, especially Sweden. Business jet flights from Russia and Turkey fell >25%.
- Business jet activity in Western Europe fell slightly and is now flat for the last 12 months. Intra-European activity as a whole fell 3% this month. Transatlantic flights were slightly down, and flights from CIS region and Africa were significantly reduced.
- There was growth in flights for 4 out of 9 business jet segments; 1-2% YOY growth in ultra-long range jets, super midsize jets, very light jets, and >5% growth in entry level jets, mainly driven by owner activity on CJ1 and CJ2 aircraft.
- The ultra-long range jet segment has increased activity in every month over the last 3 years. Bombardier aircraft are getting the most gains here, increasing activity 6% this month, in contrast to Dassault and Gulfstream flights, which declined.
- The Bombardier jets with most activity gains this month were the Global Express and Challenger 300 platforms. Other business jets with activity growth this month included the Falcon 2000, for Private flights, and Citation Mustang, for Charter flights.
- The top 4 airports saw substantial declines this month, with almost 10% dip at Geneva. There was a 24% fall in activity at Vnukovo, 11% decline at Barajas. Activity increased at Luton, Biggin Hill, and by >25% at Schipol airports.

## Definitions

- › The charts illustrated in this analysis source data from national business aviation associations, Eurocontrol, and the FAA, covering 50 European, Middle Eastern and North African national territories.
- › All data analysis is carried out by WINGX Advance through our proprietary activity tracking methodology.
- › We cover all types of private (owner) and commercial (AOC) flight. AOC flights include charter and special mission activity such as medical flights. We exclude maintenance and training flights.
- › Illustrated flight activity analysis pertains to all IFR registered flights within Eurocontrol territories and between Eurocontrol territories and the rest of the world.
- › The analysis covers all single and multi engine business aviation aircraft categories: Jets, Turboprops and Pistons, equating to more than 300 aircraft types.
- › Jet aircraft activity is segmented by cabin/range capability: Ultra Long Range, Heavy Jet, Super Mid-size Jet, Mid-size Jet, Super Light Jet, Light Jet, Entry Level Jet, Very Light Jet.
- › All aggregate activity represents business jet activity only. Wherever Turboprop and Piston activity is shown it is separately broken out.
- › Aircraft utilisation is measured by number of flight departures and the related number of flight hours. Our analysis does not include Overflights.
- › The analysis is shown for the preceding calendar month; it is compared to the previous year same month (YOY or Year on Year), and to the current total activity for the year (YTD or Year to Date).

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