Insights from Flight Activity

Monday, 20th May 2016| 09.20– 09.45

PRESENTED BY:

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Providers of actionable business intelligence

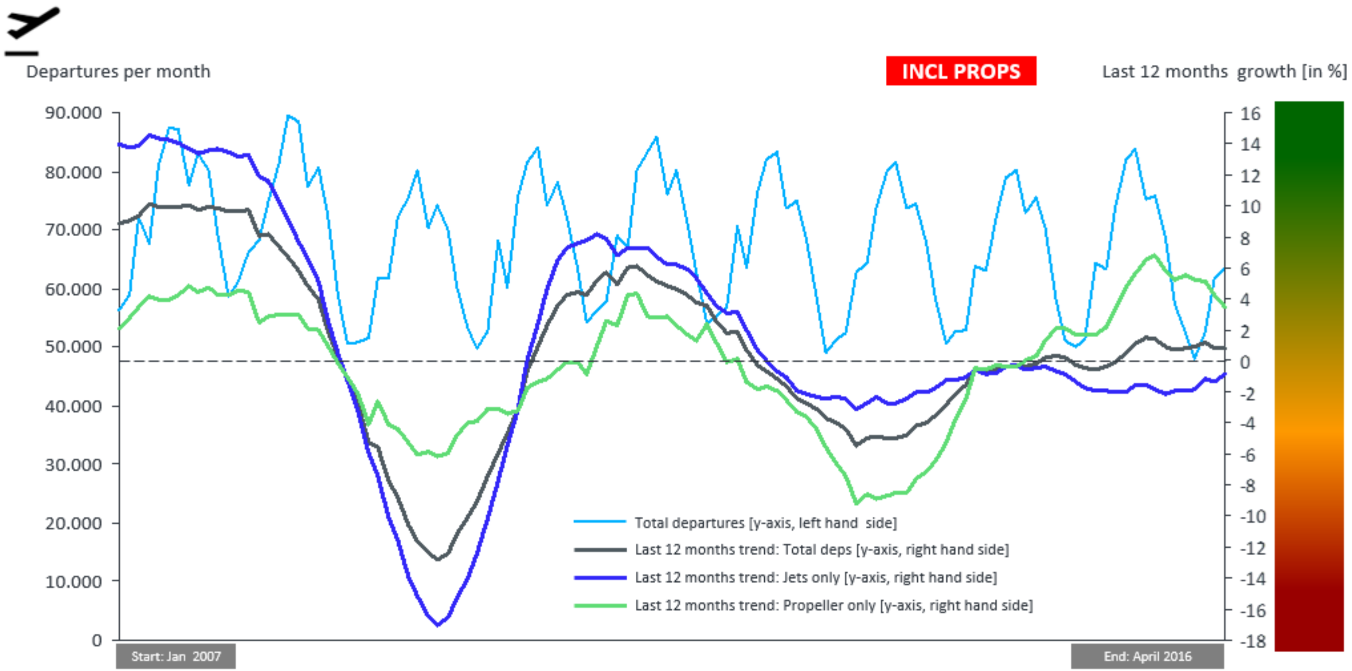
Market Trends in Europe

Insights from flight activity trends

- What can recent activity trends tell us about the current state of the market?
- Are there growth trends, underlying an overall stagnant market?
- To what extent have operators now been consolidated?
- Could commercial Single-Engine IMC provide significant boost?
- How big could the fleet which needs NCC compliance be?
- A glance at the UK market; what are the implications of Brexit for bizav?

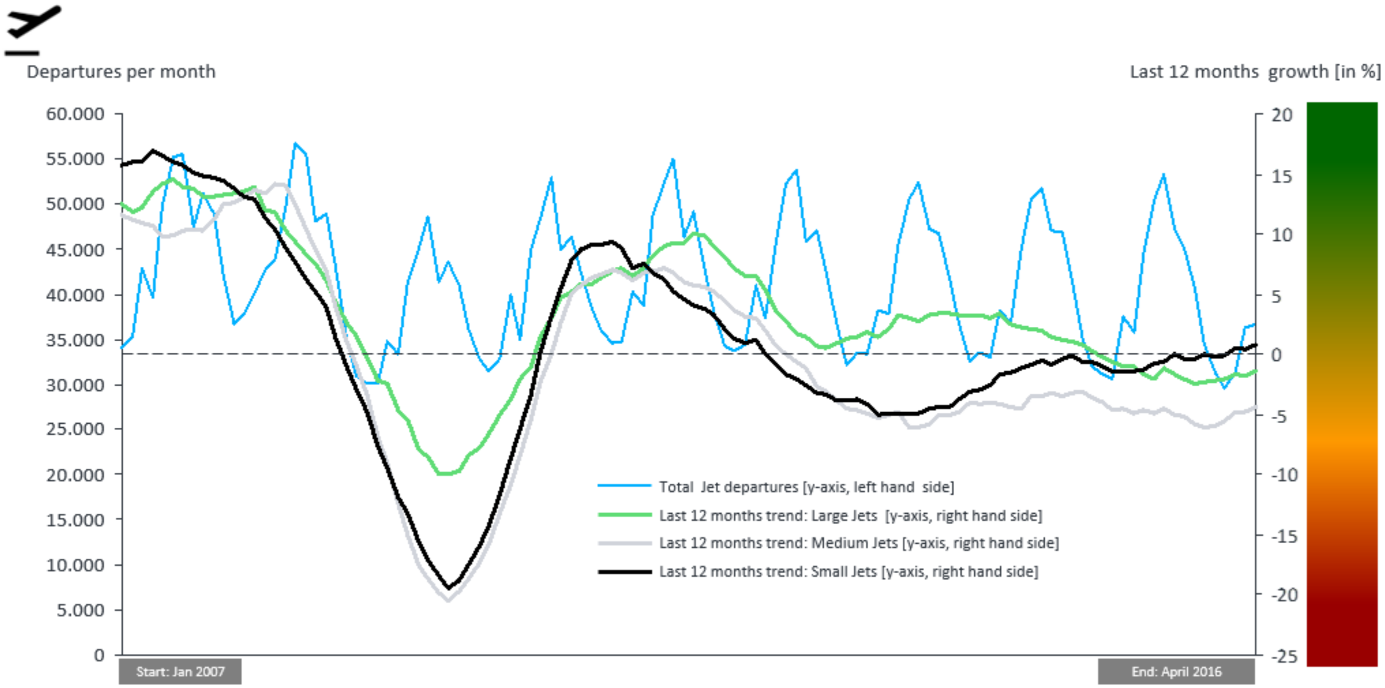
Sources: WINGX business aviation intelligence

Flight activity trend shows we're not yet out of the woods



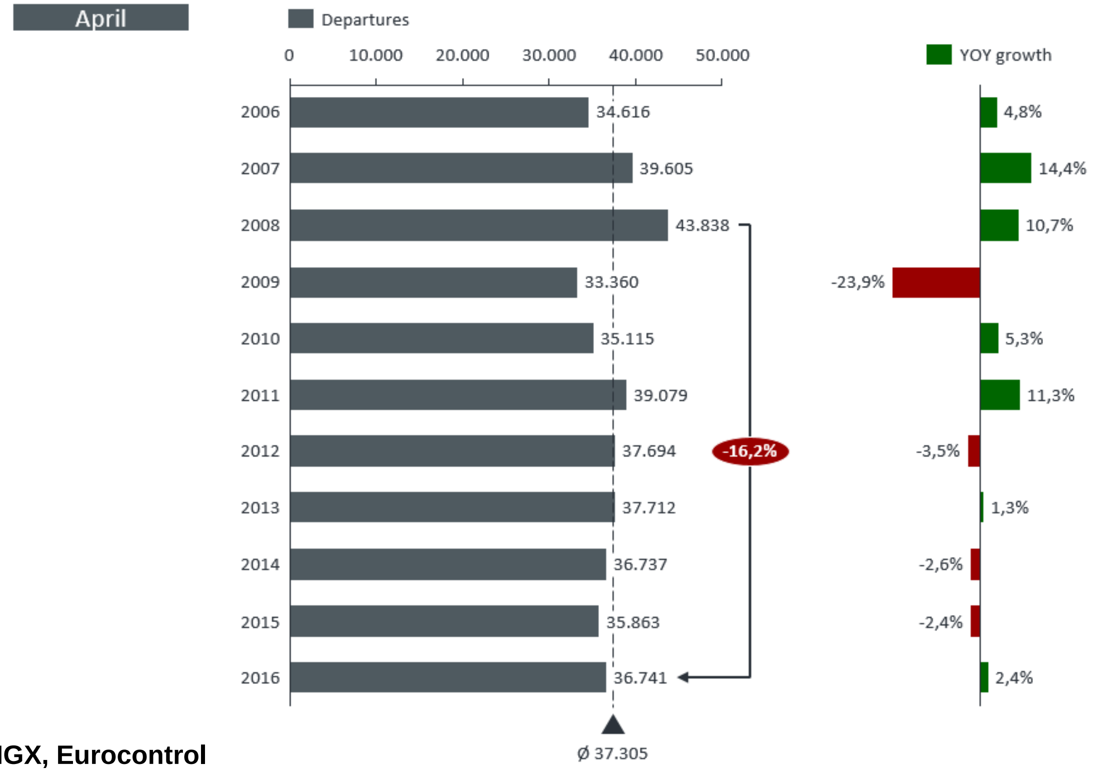
Sources: WINGX, Eurocontrol

Midsize slump; Large jets down; Small jet recovery?



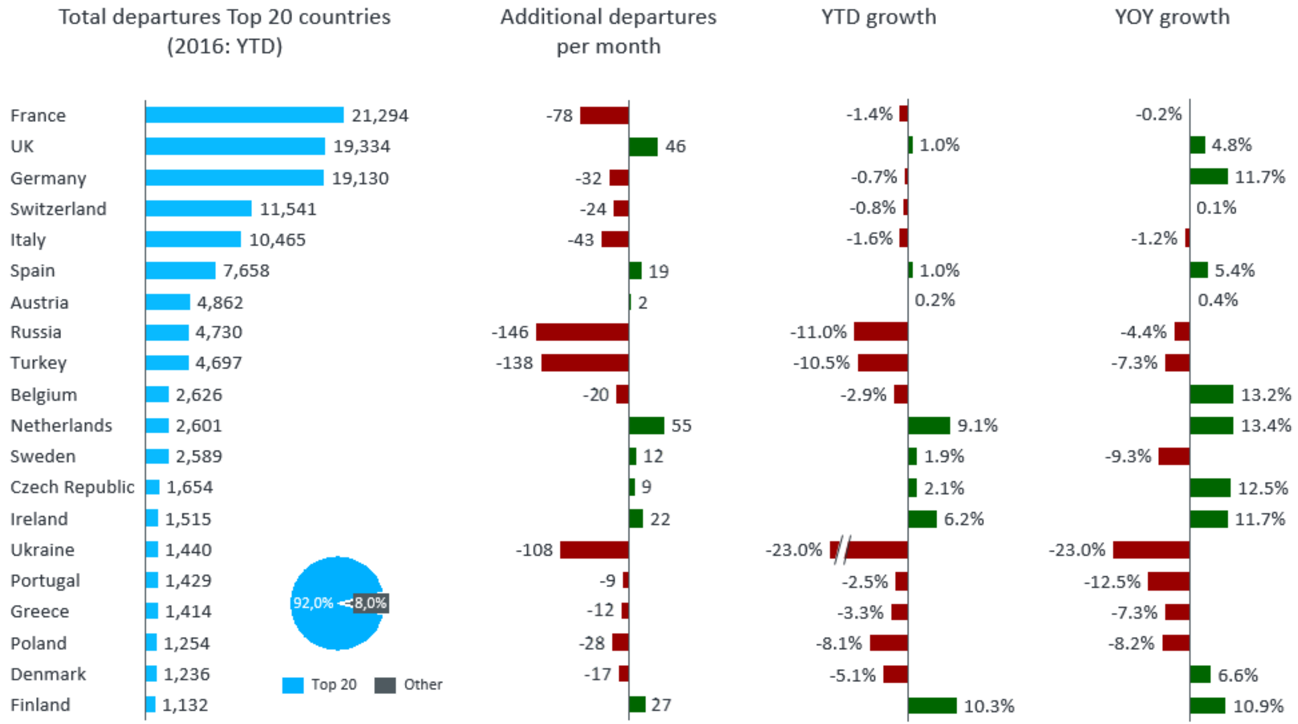
Sources: WINGX, Eurocontrol

Jet activity still 16% below pre-recession high point



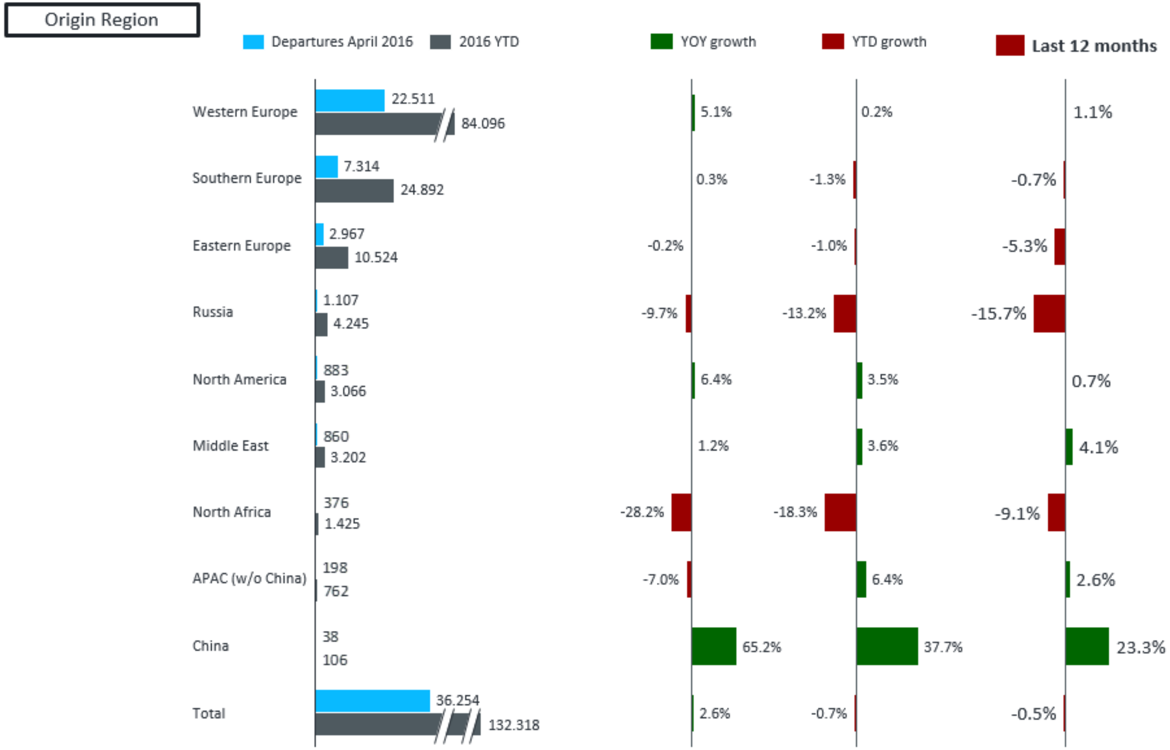
Sources: WINGX, Eurocontrol

So far in 2016, -1%. Of top 6, only UK has YTD growth



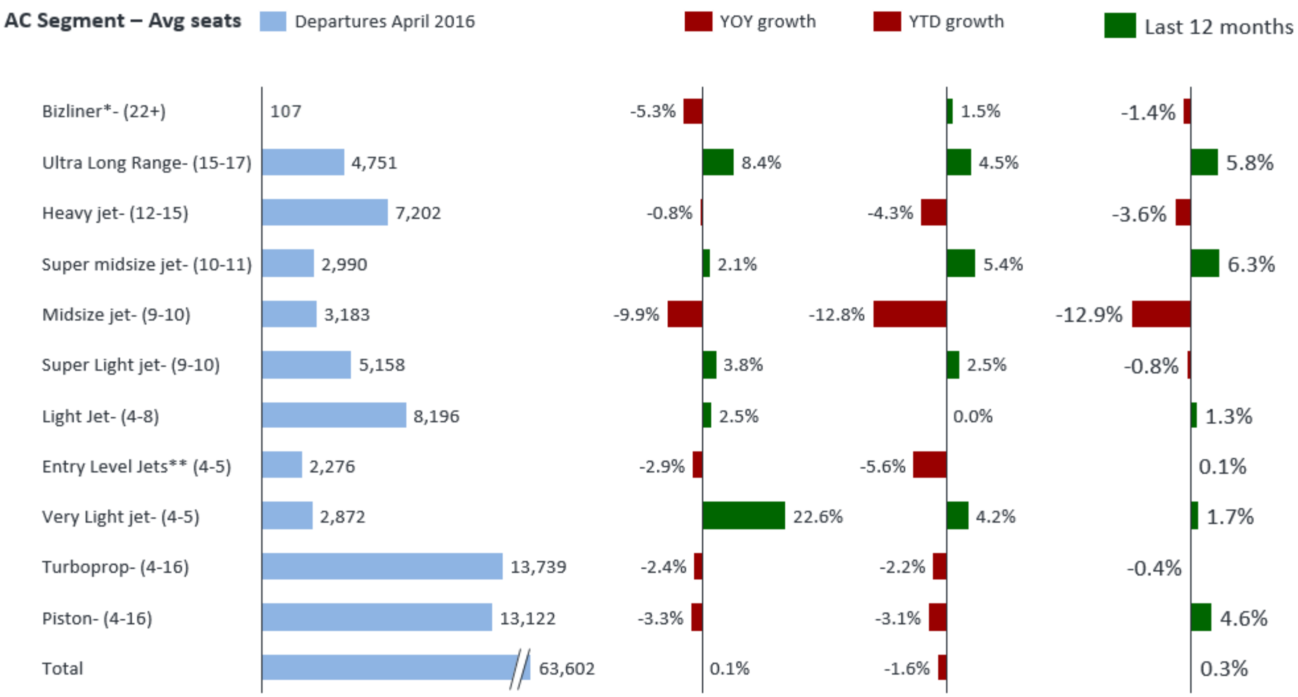
Sources: WINGX, Eurocontrol

L12M trend: Eurozone OK, Russia -16%, M-E resilient



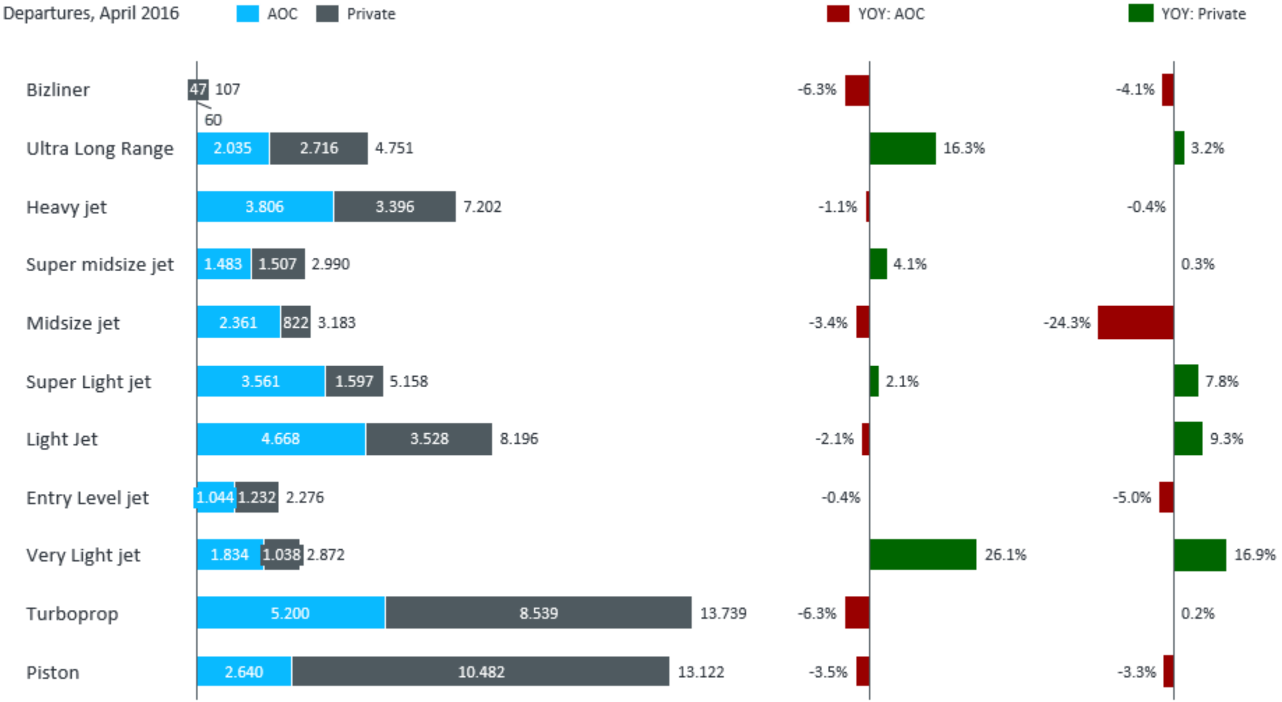
Sources: WINGX, Eurocontrol

L12M trend: ULR, SMJ, VLJ up. HJ and MSJ well down.



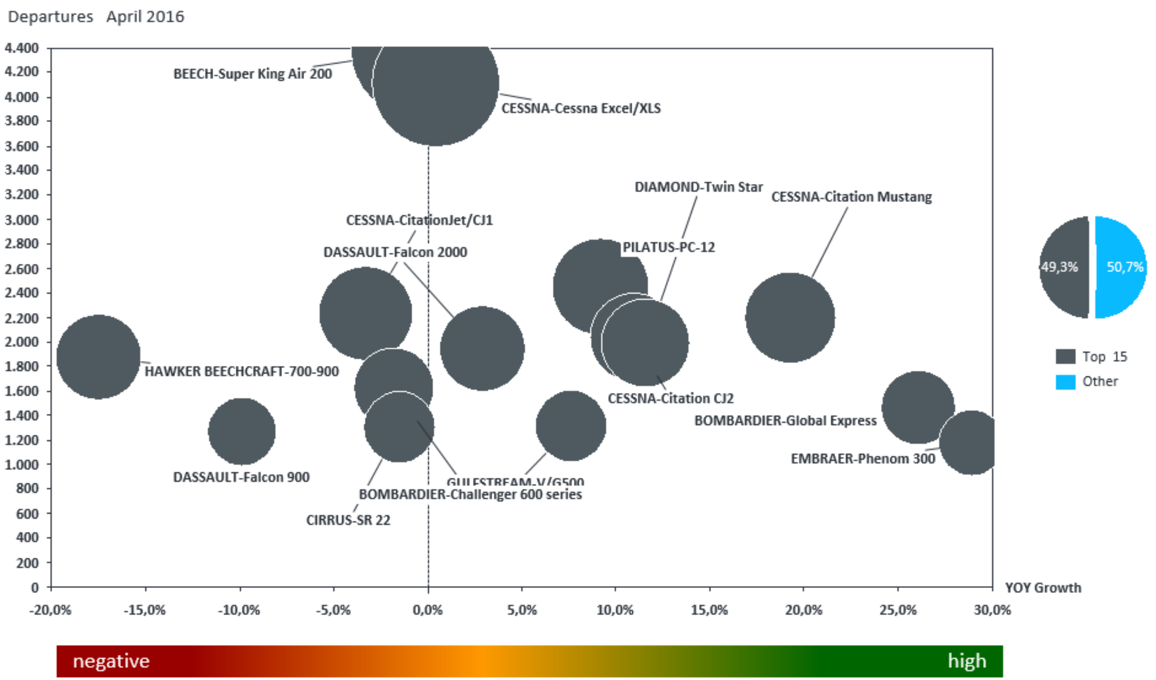
Sources: WINGX, Eurocontrol

L12M trend: AOC growth trend for ULR, SMJ, VLJ.



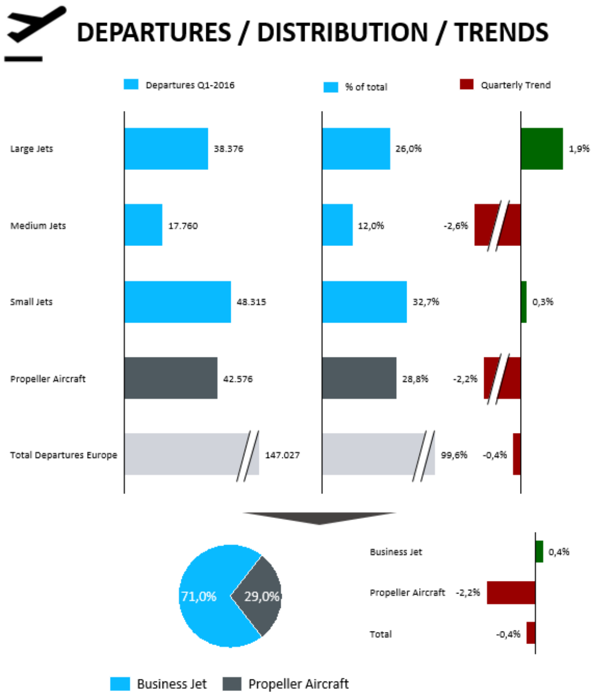
Sources: WINGX, Eurocontrol

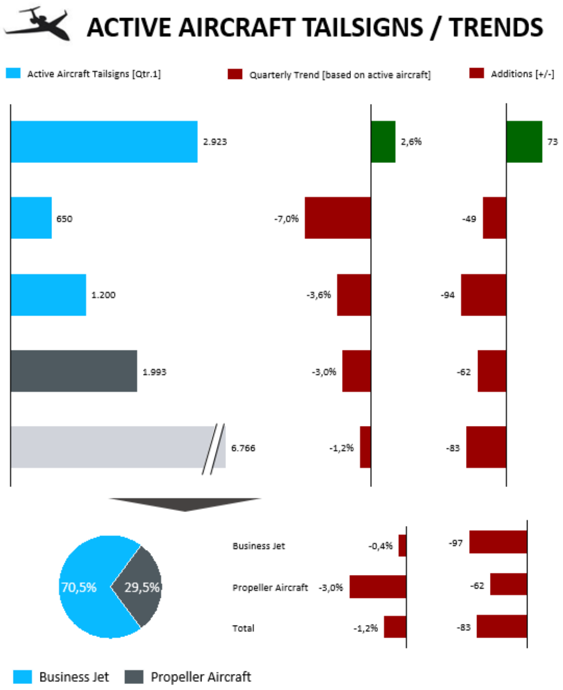
YTD: Mustang, Phenom 300, GLEX / Hawker, Falcon 900



Sources: WINGX, Eurocontrol

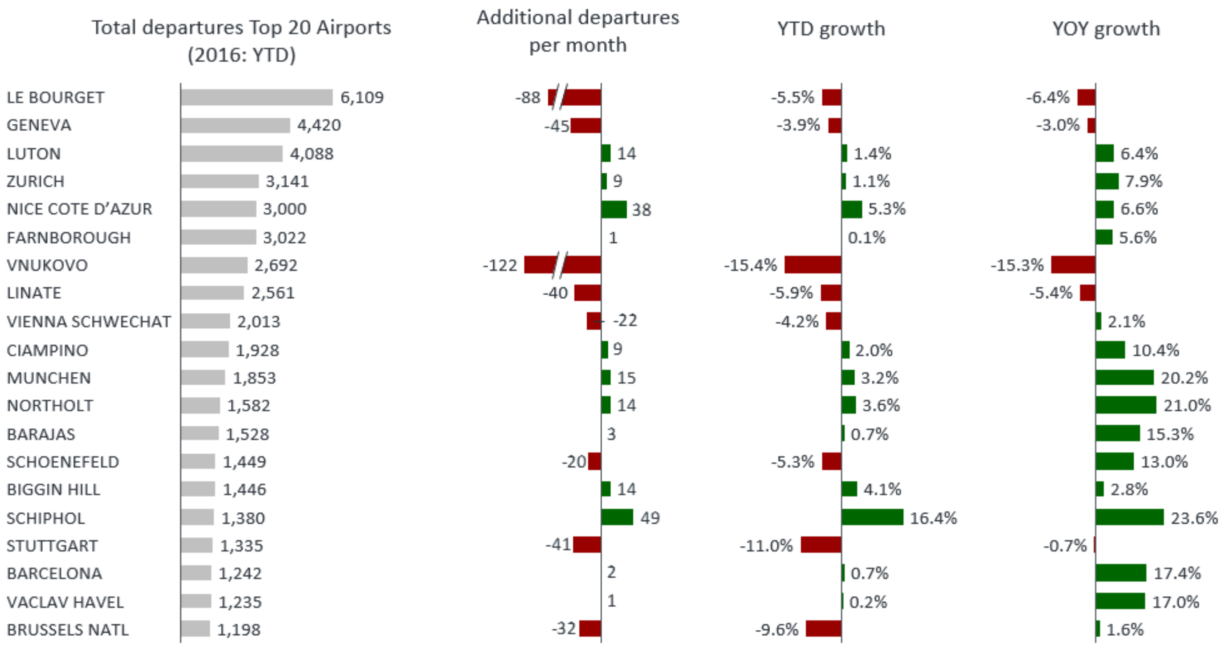
Behind the numbers, changes in size of active fleet





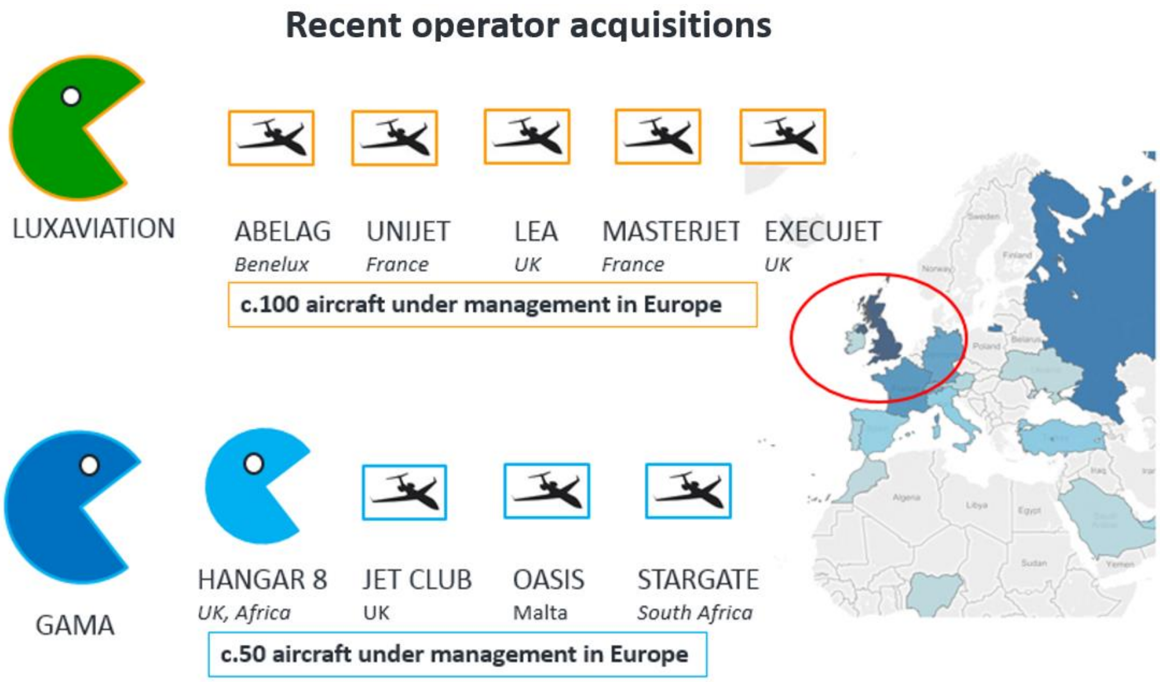
Sources: WINGX, Eurocontrol

April strong but worrying YTD trend LFPB, LSGG, UUWW



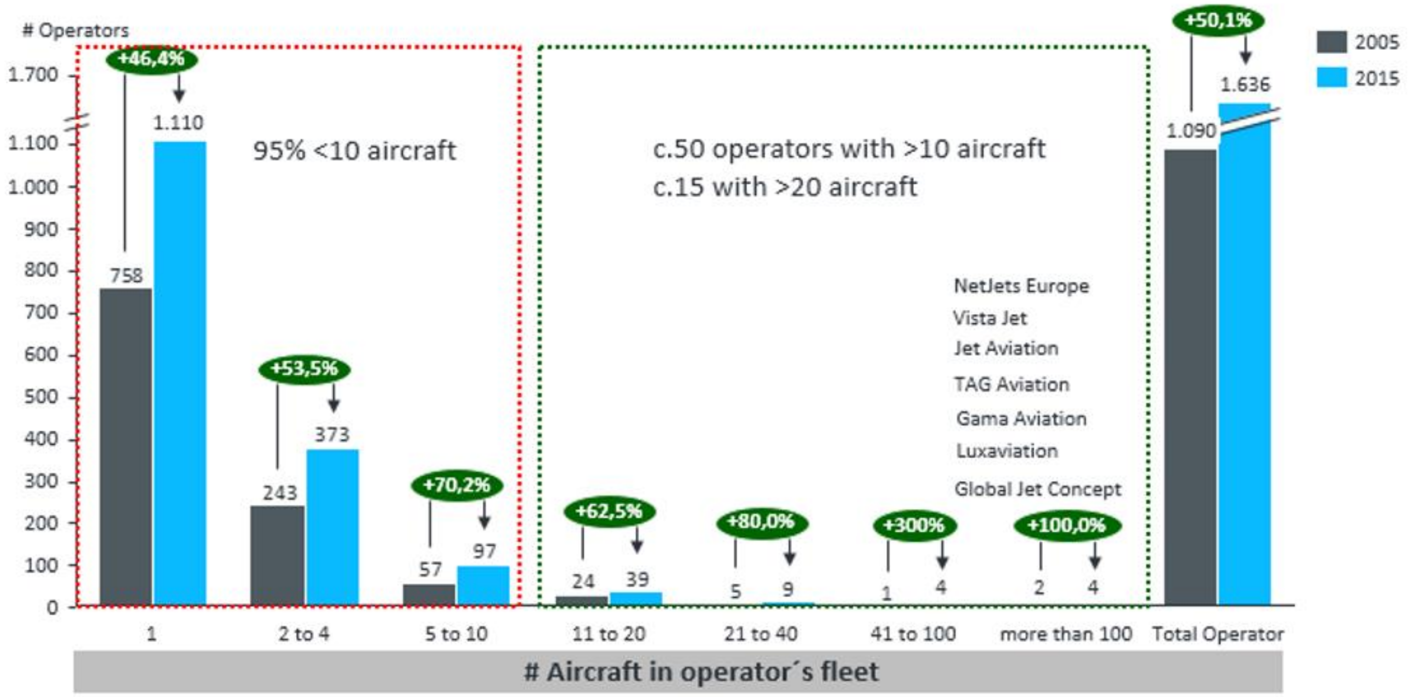
Sources: WINGX, Eurocontrol

Rapid pace of consolidation during 2013-2015



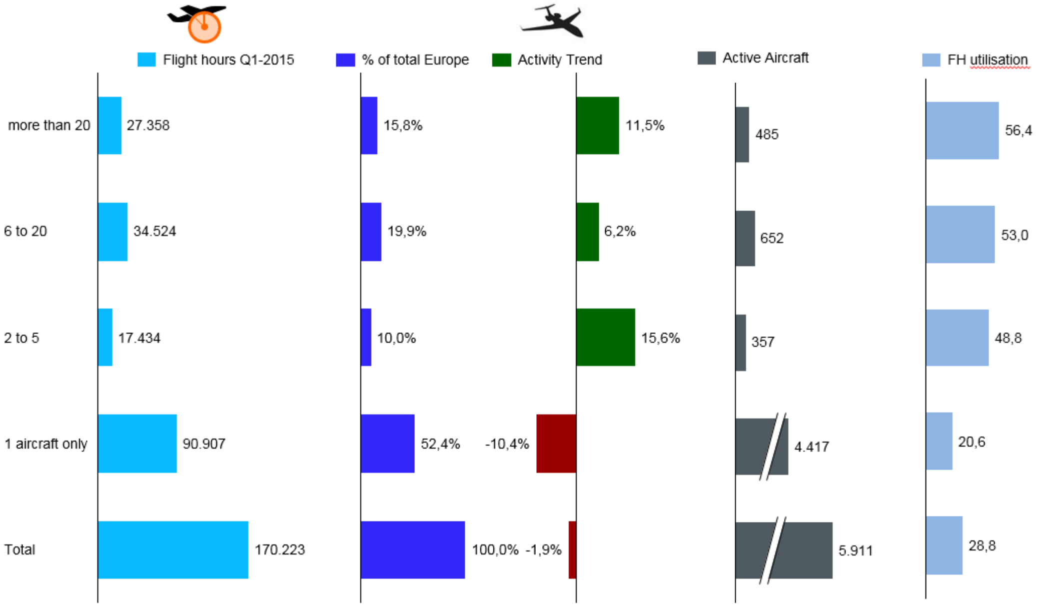
Sources: WINGX, Eurocontrol

But market consolidation of operators has barely started



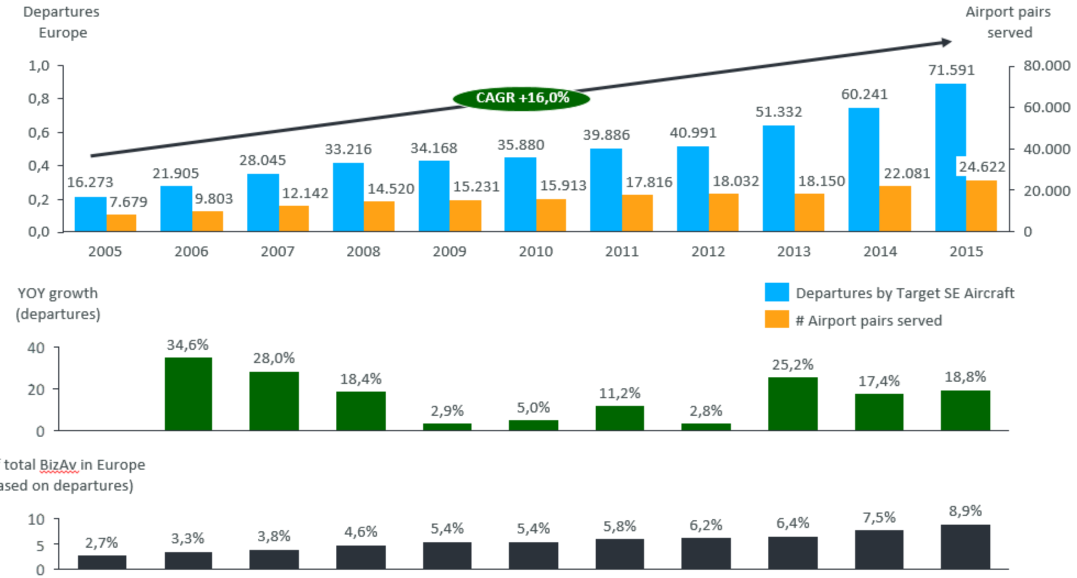
Sources: WINGX, Eurocontrol

Also true of activity: fleets <5 ac operate 62% of activity



Sources: WINGX, Eurocontrol

Selective Single-Engine Prop aircraft are in great demand

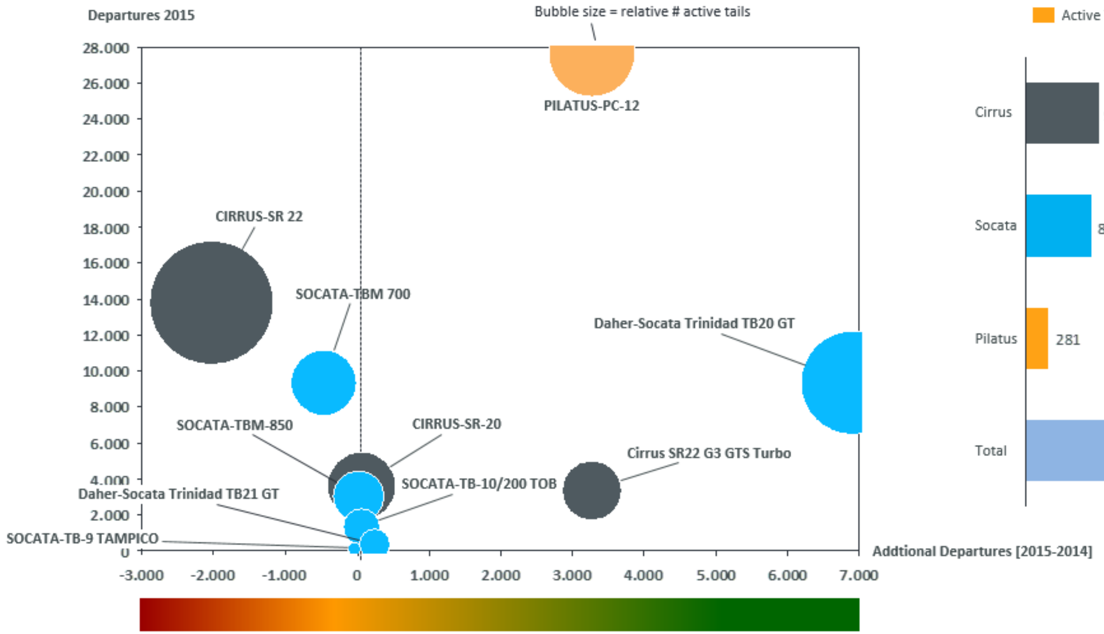


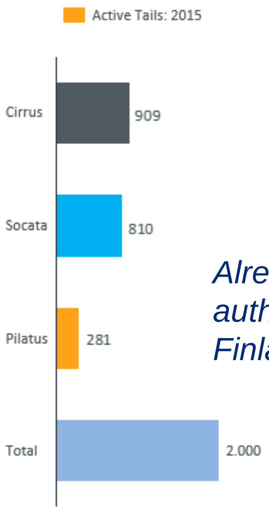
Note:
- Only IFR flights are considered
- "Origin = Destination" - Flights are excluded
- All Missions are included
- Only Cirrus, Socata and Pilatus Aircraft are considered

SE-IMC expected final authorisation by early 2017

Sources: WINGX, Eurocontrol

PC12, Socata TBM, SR-22 could all viable charter aircraft

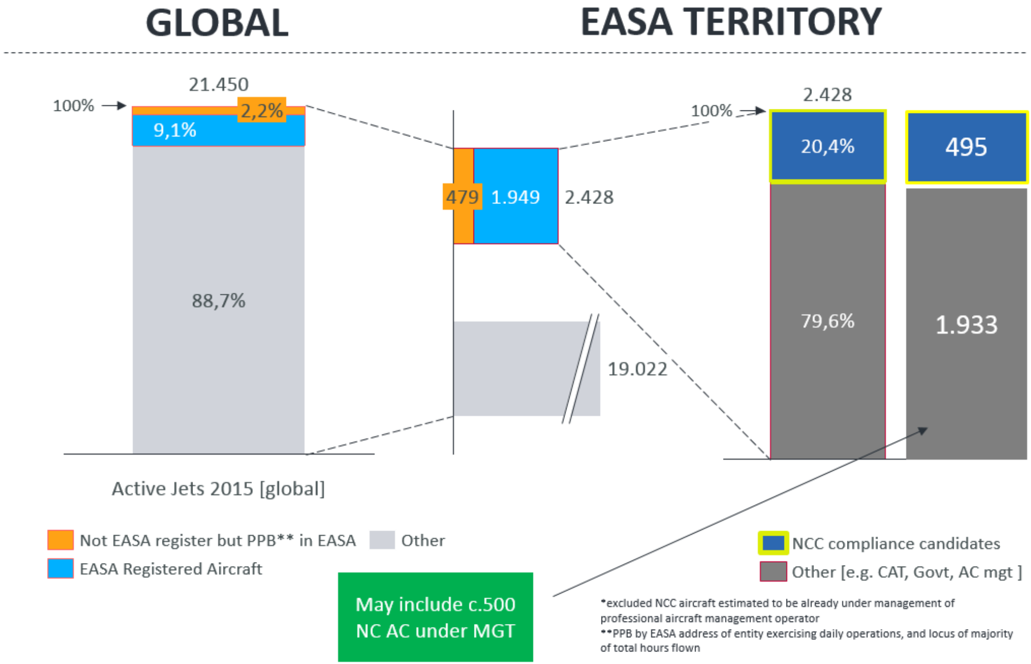




Already limited authorisation in Finland, France

Sources: WINGX, Eurocontrol

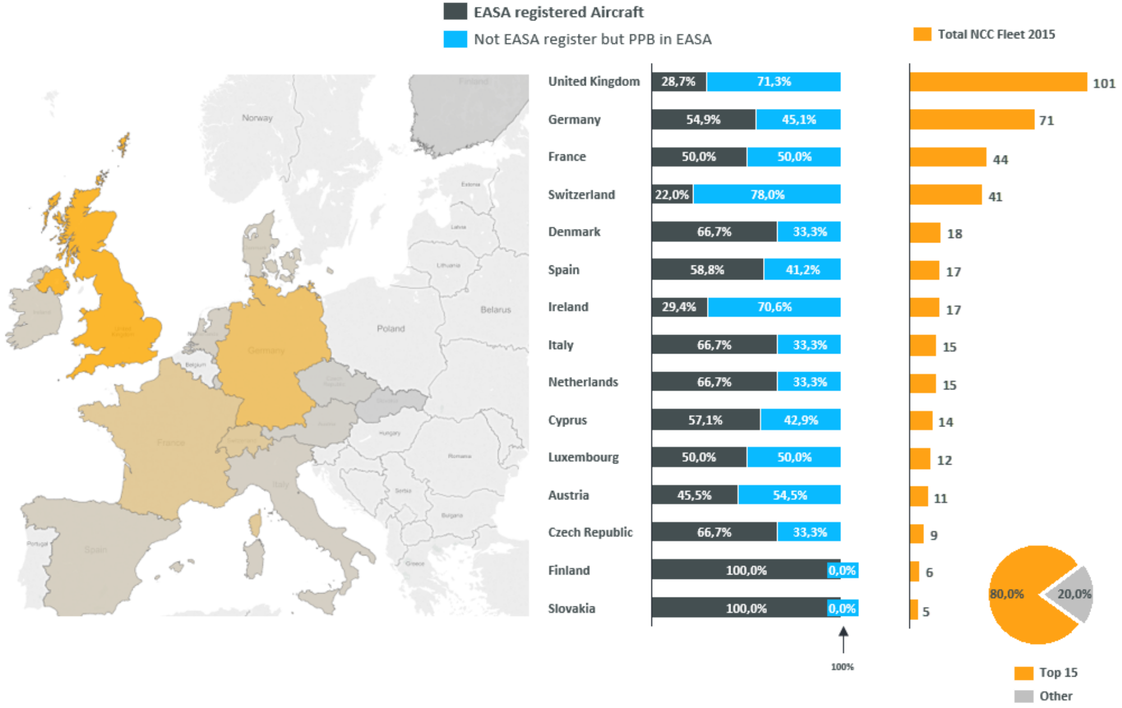
At least 500 NCC aircraft require compliance conversion



NCC comes into force in August 2016

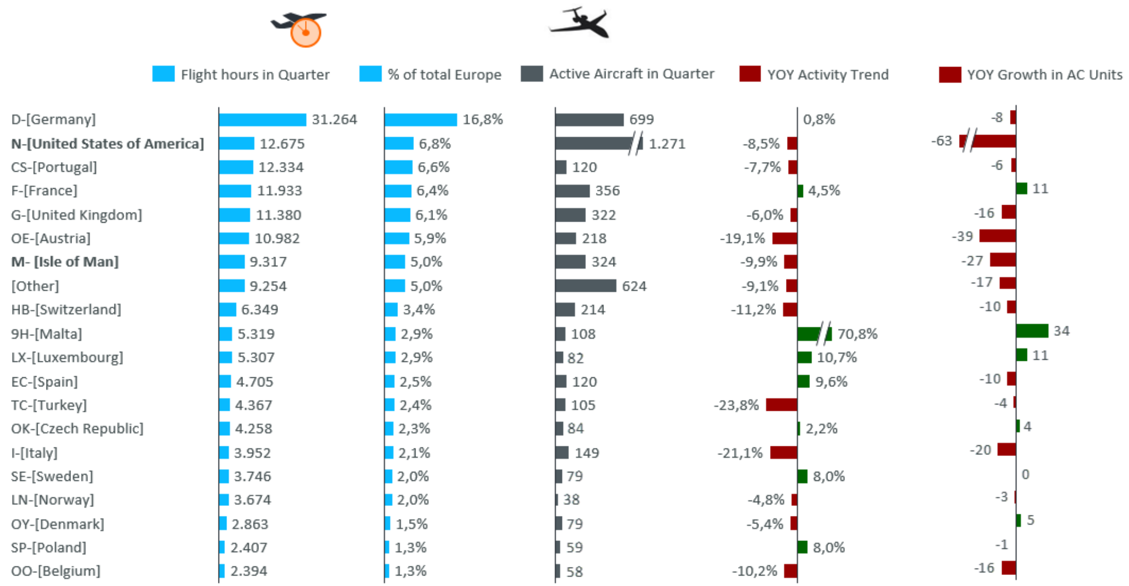
Sources: WINGX, Eurocontrol

Majority of this candidate fleet in UK, Germany, France



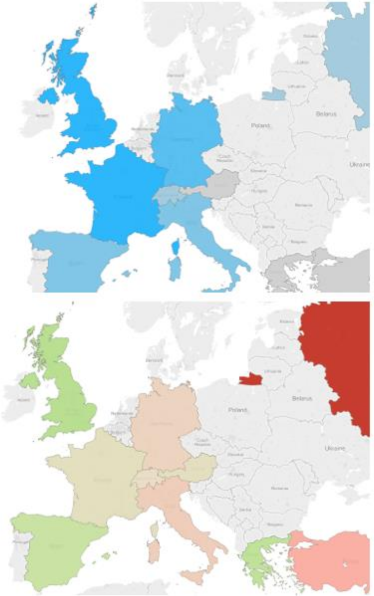
Sources: WINGX, Eurocontrol

Challenge for non-EASA registered fleet active in Europe

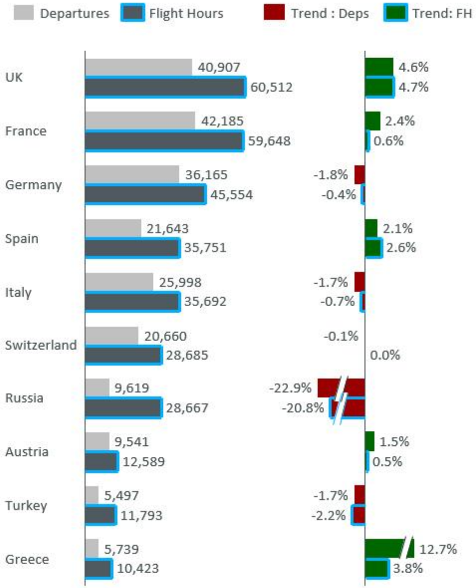


Sources: WINGX, Eurocontrol

Possibility of Brexit: How important is UK bizav activity?



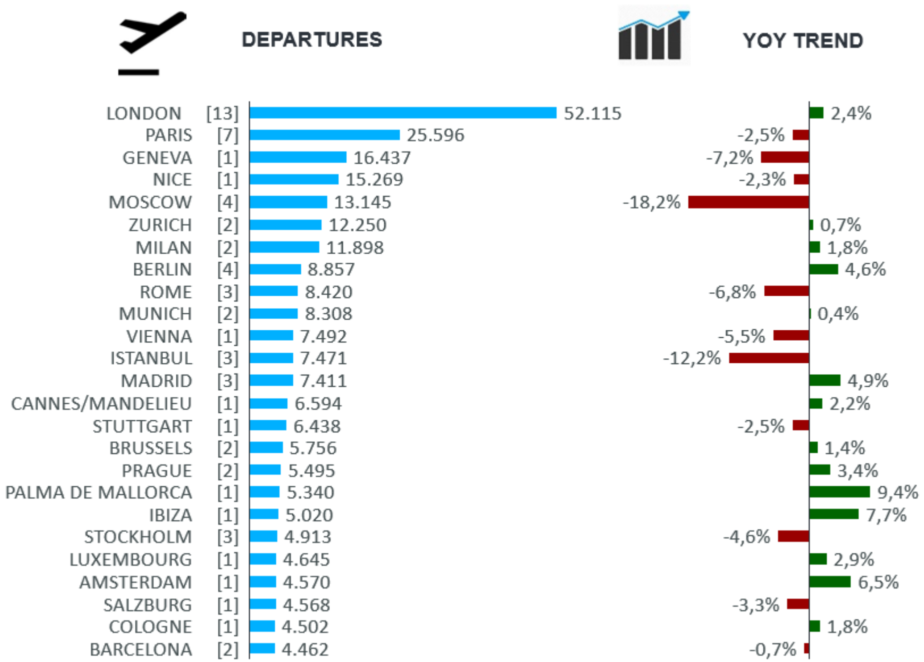
Note: Maps are based on Flight hours



Vote in June 2016. Currently 50/50 Remain/Exit.

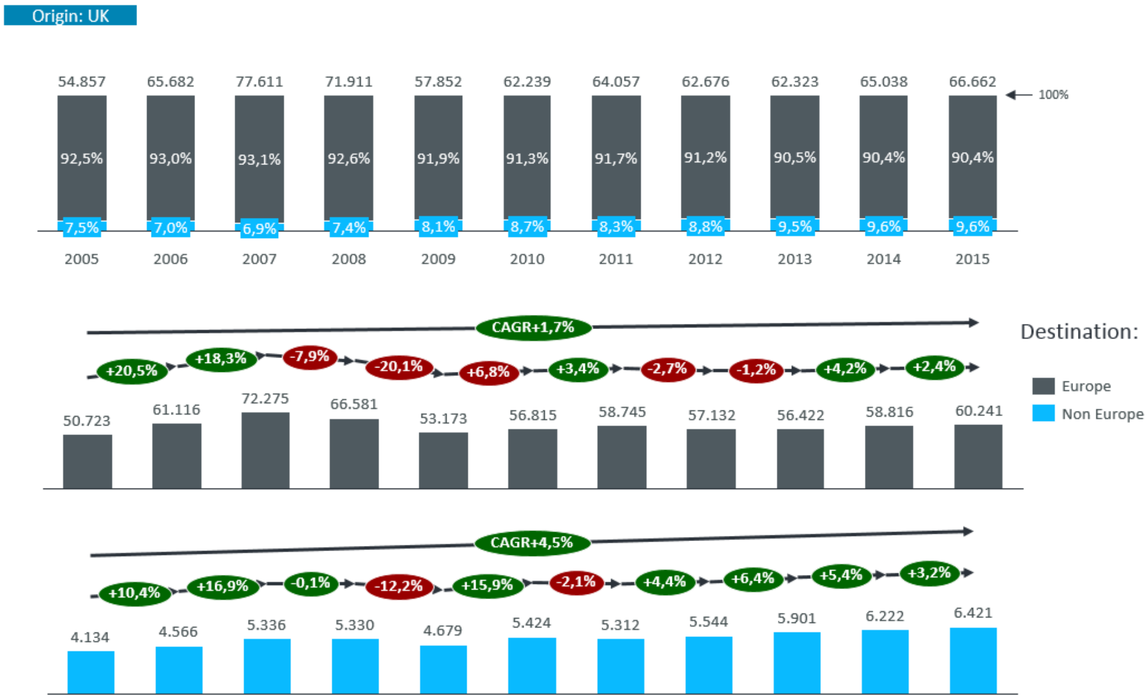
Sources: WINGX, Eurocontrol

London is the hub of European business aviation activity



Sources: WINGX, Eurocontrol

UK flights to non-Euro destinations growing much faster



Sources: WINGX, Eurocontrol

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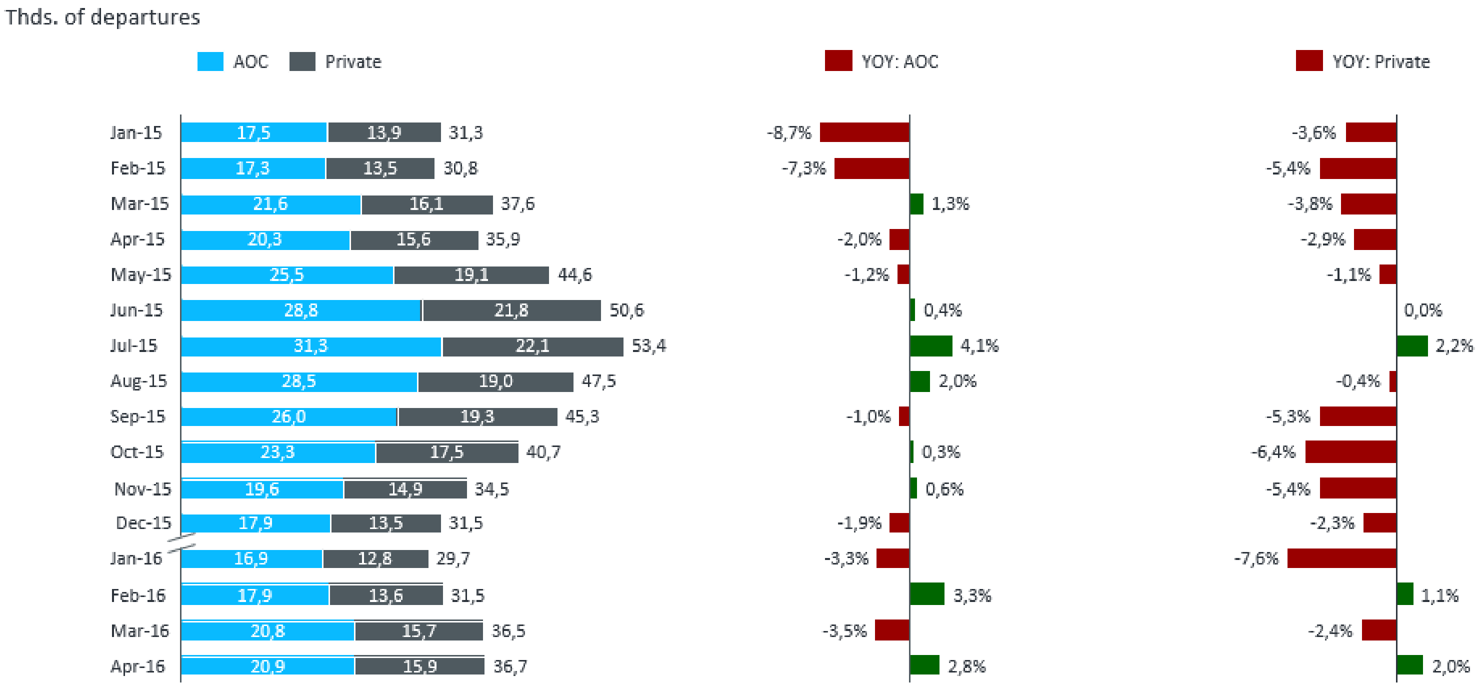

Sources: WINGX, Eurocontrol