Middle East Airline Capacity – Winter 2013/14
Boeing Commercial Airplanes

Istanbul Technical University

Air Transportation Management

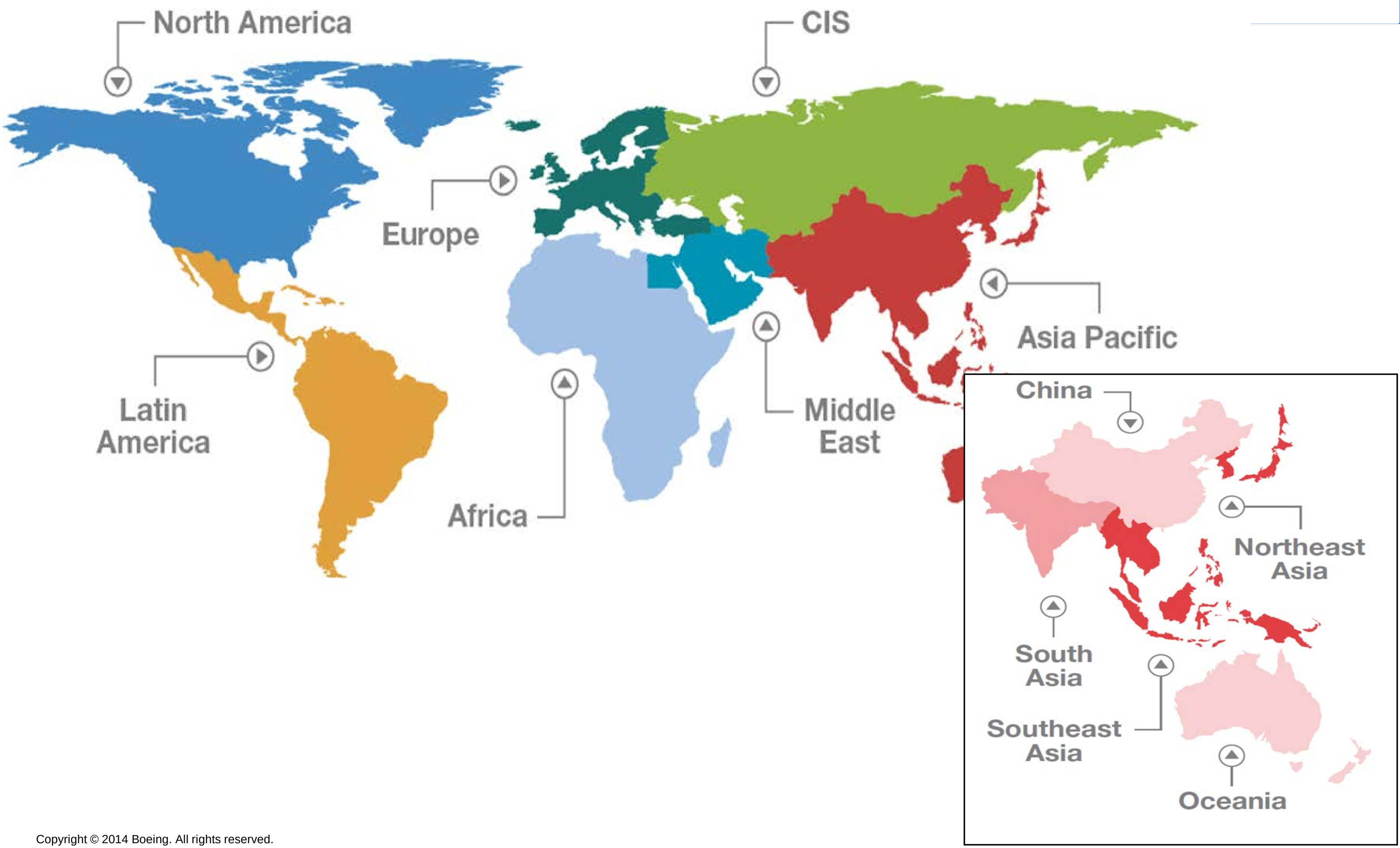
M.Sc. Program

Network, Fleet and Schedule

Strategic Planning

Module XX : 14 March 2014

World Regional Definitions

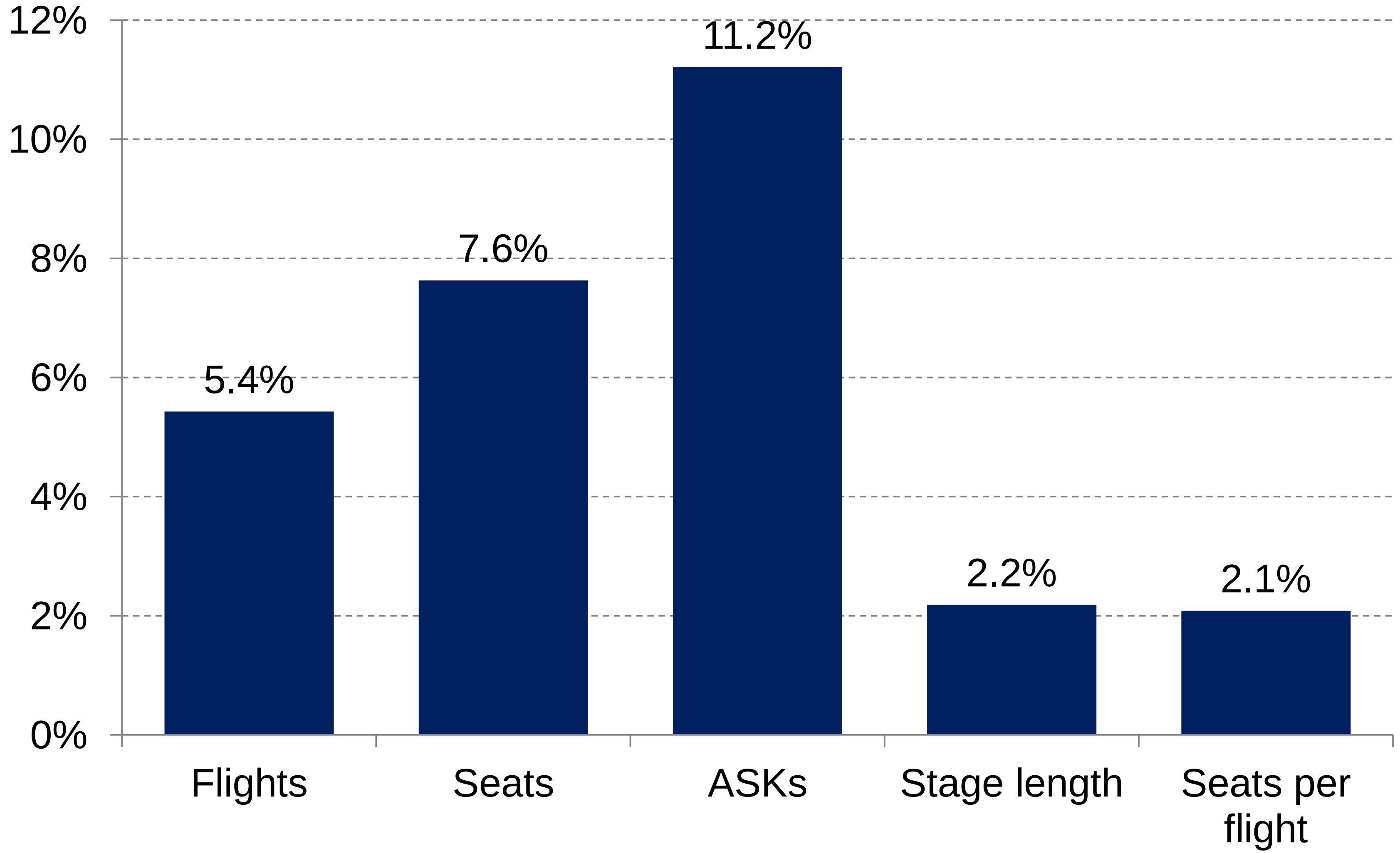


Middle East Capacity Report – Summary
December 2013 vs. December 2012

- **Airline capacity (ASKs) to/from/within the Middle East increased 11.2% from the prior year, 1.5x the global average**
- **Growth was led by the Gulf 3, Saudia, and the region's LCCs**
- **Most of the region's other flag carriers remained static, or suffered declines**
    - **Political turmoil in the region was limited in impact, with Egyptair and Syrian Arab Airways making capacity cuts**
    - **Other flag carriers, including Gulf Air and Bahrain Air, lack competitive strength relative to the LCCs and the Gulf 3**
- **Europe, South Asia, and South East Asia were the largest markets by ASKs**
- **Intra-Middle East remained the largest market in terms of seats**

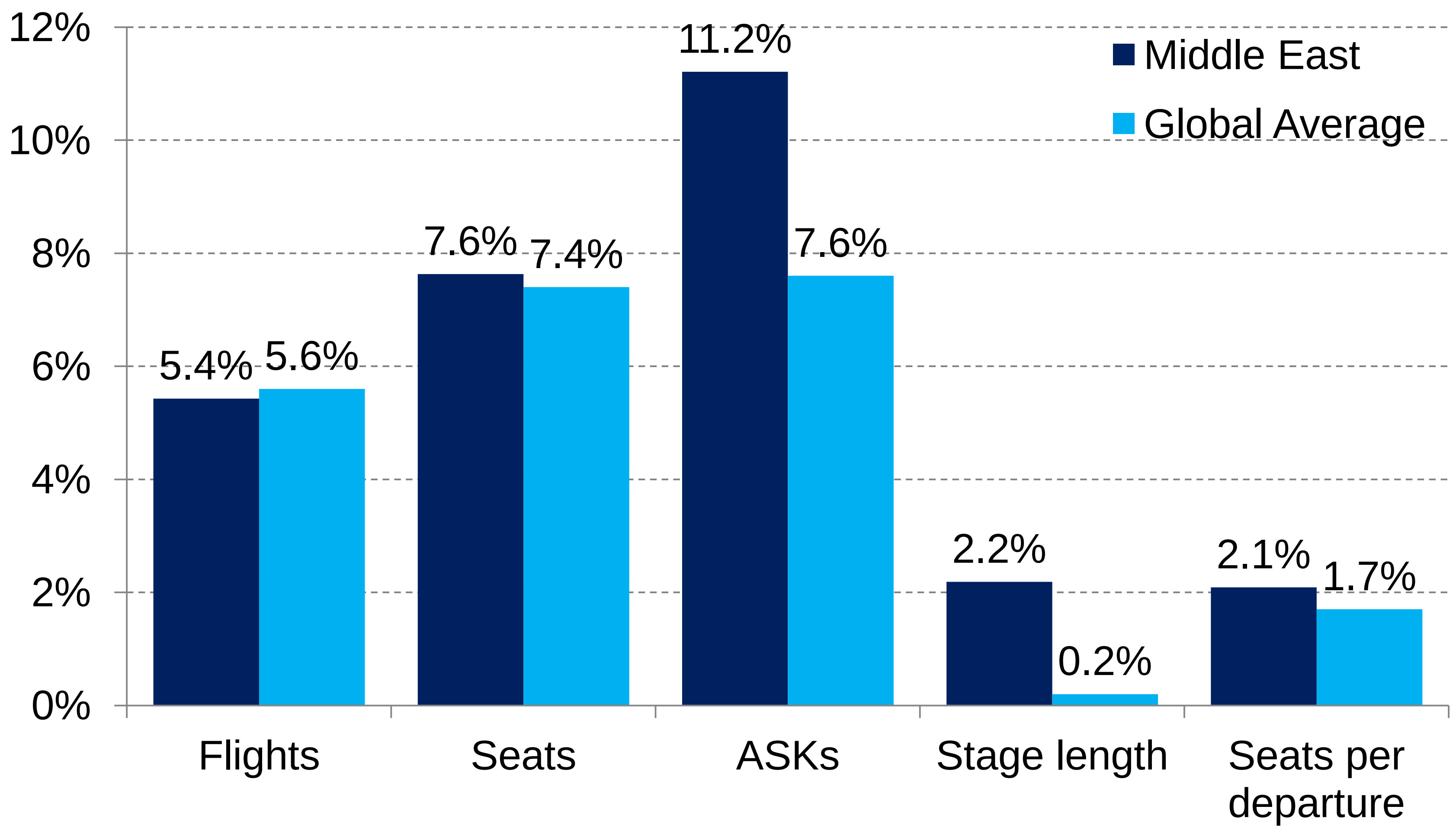
Middle East Capacity

December 2013 vs. December 2012; all traffic to/from/within; all airlines



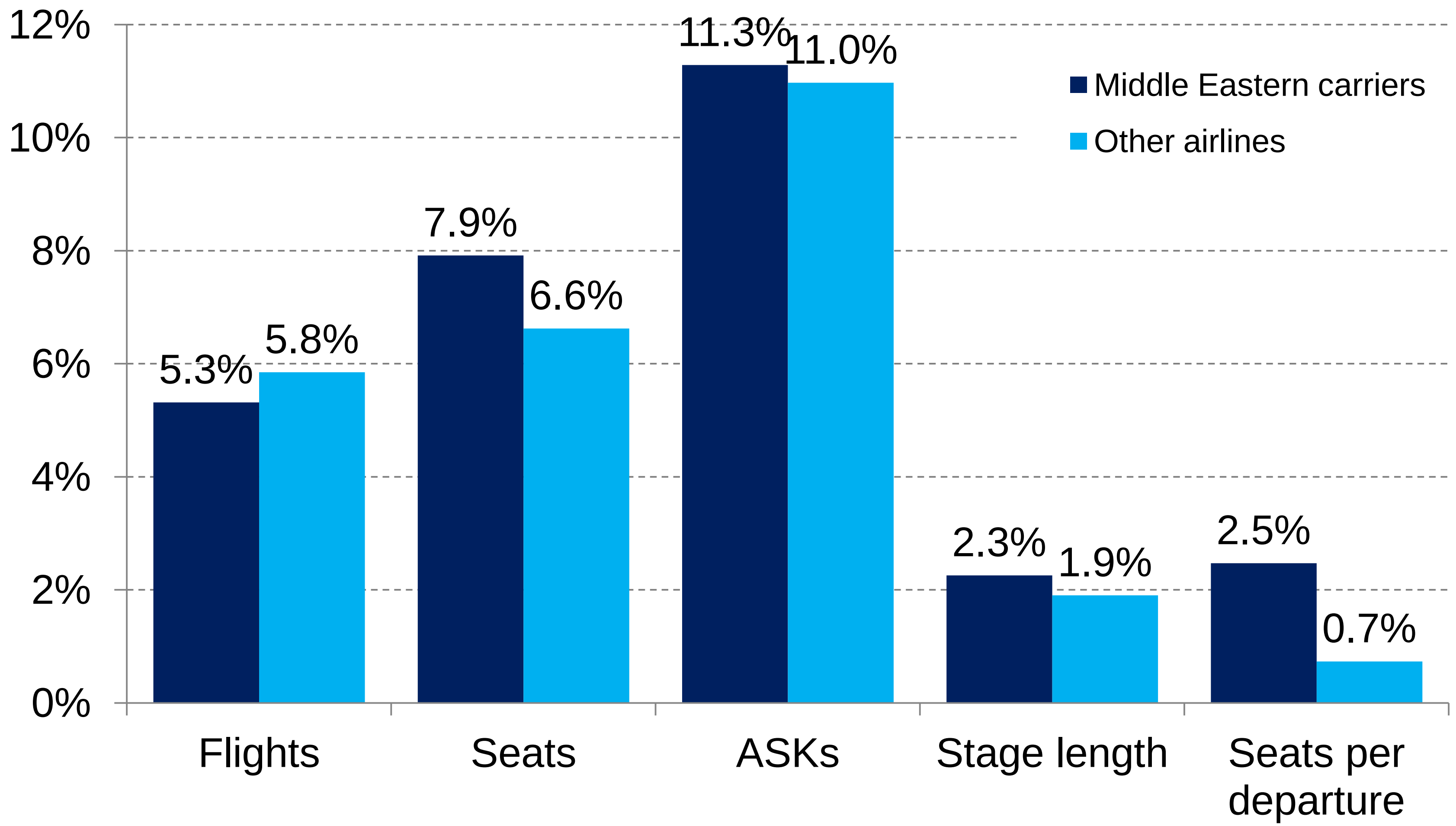
Middle East Capacity vs. Global Average

All airlines, December 2013 vs. December 2012



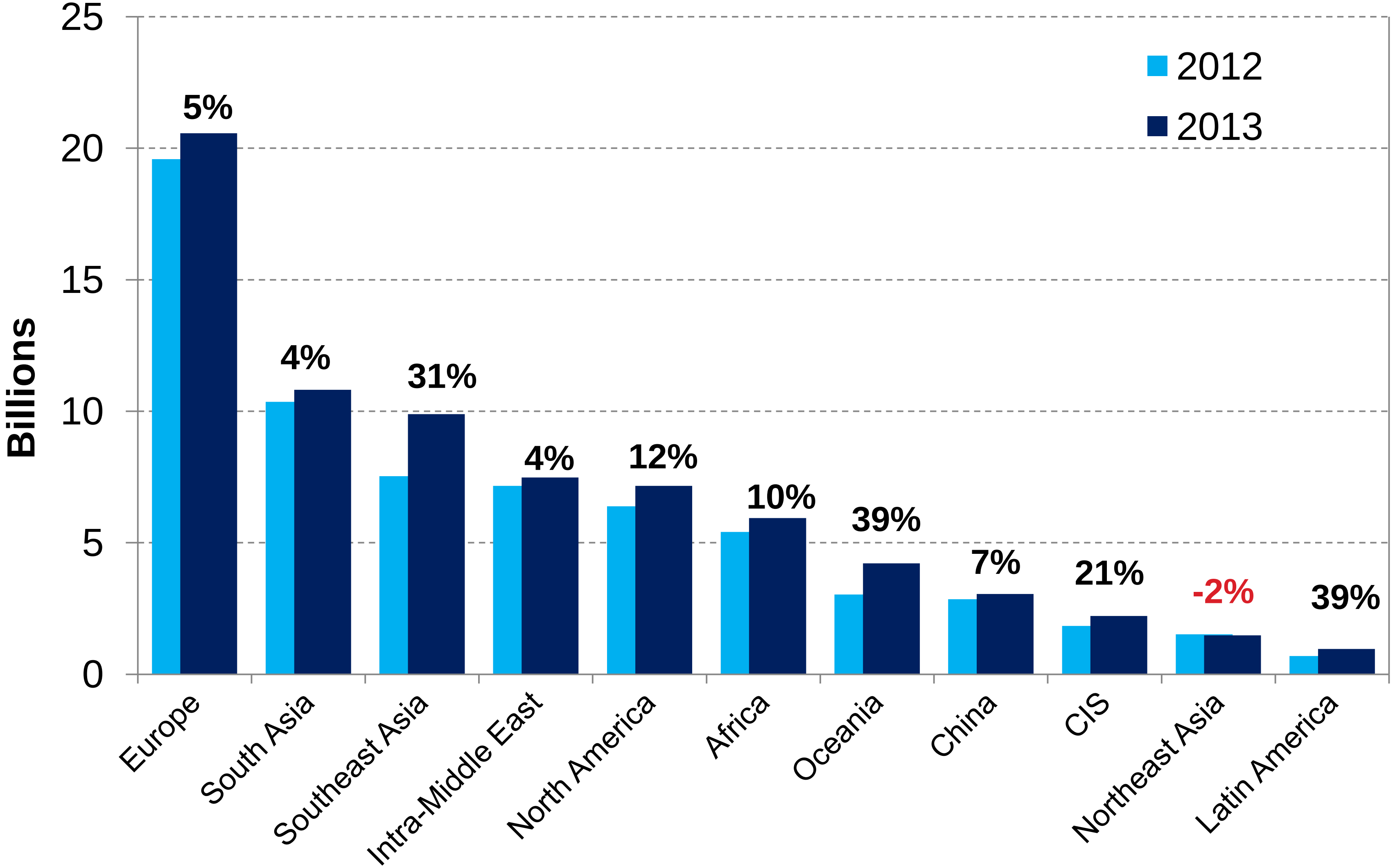
Middle East capacity

December 2013 vs. December 2012; flights to/from/within the region



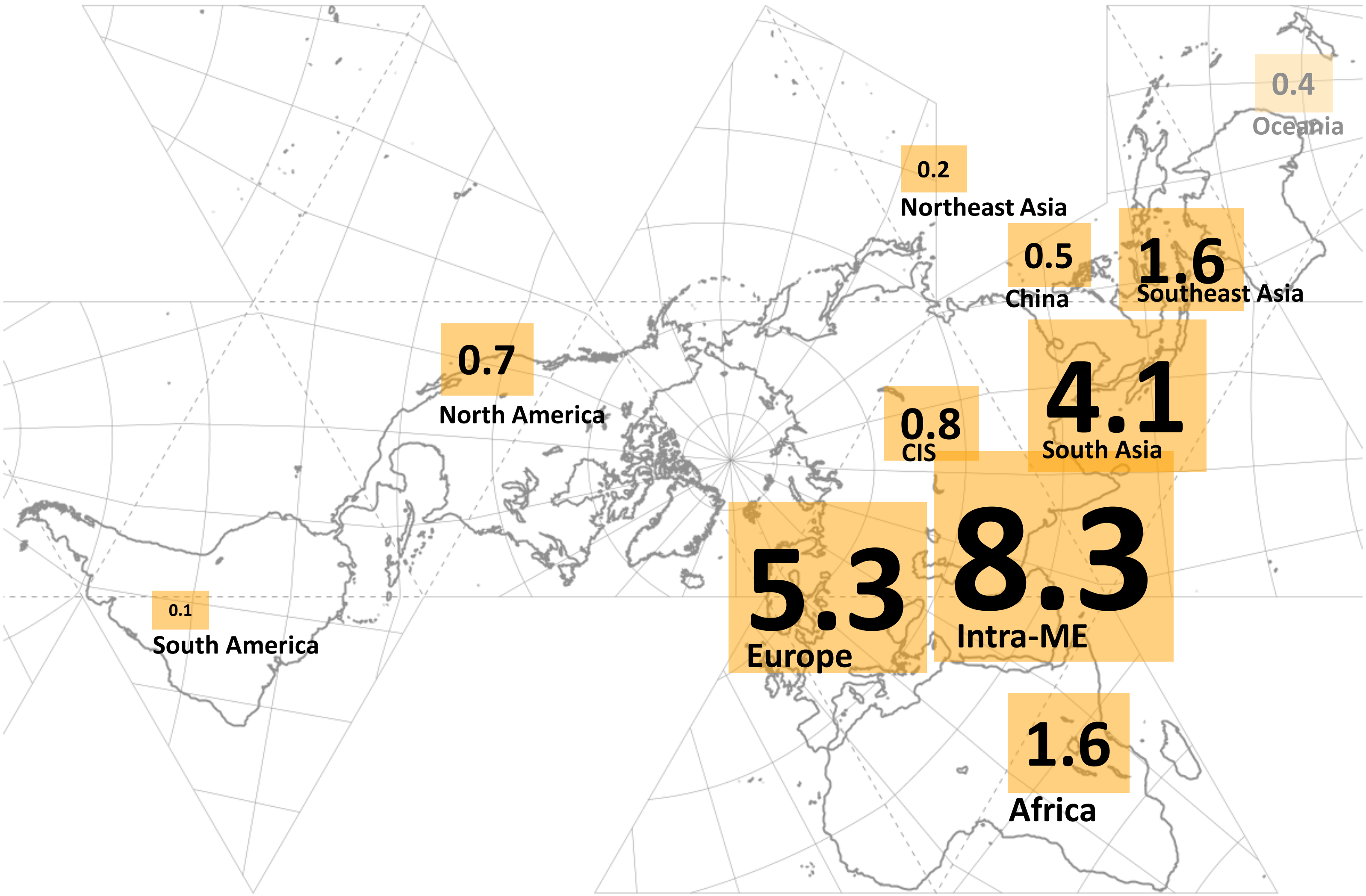
Regional flows to/from the Middle East

ASKs; All carrier domiciles; December 2013 vs. December 2012



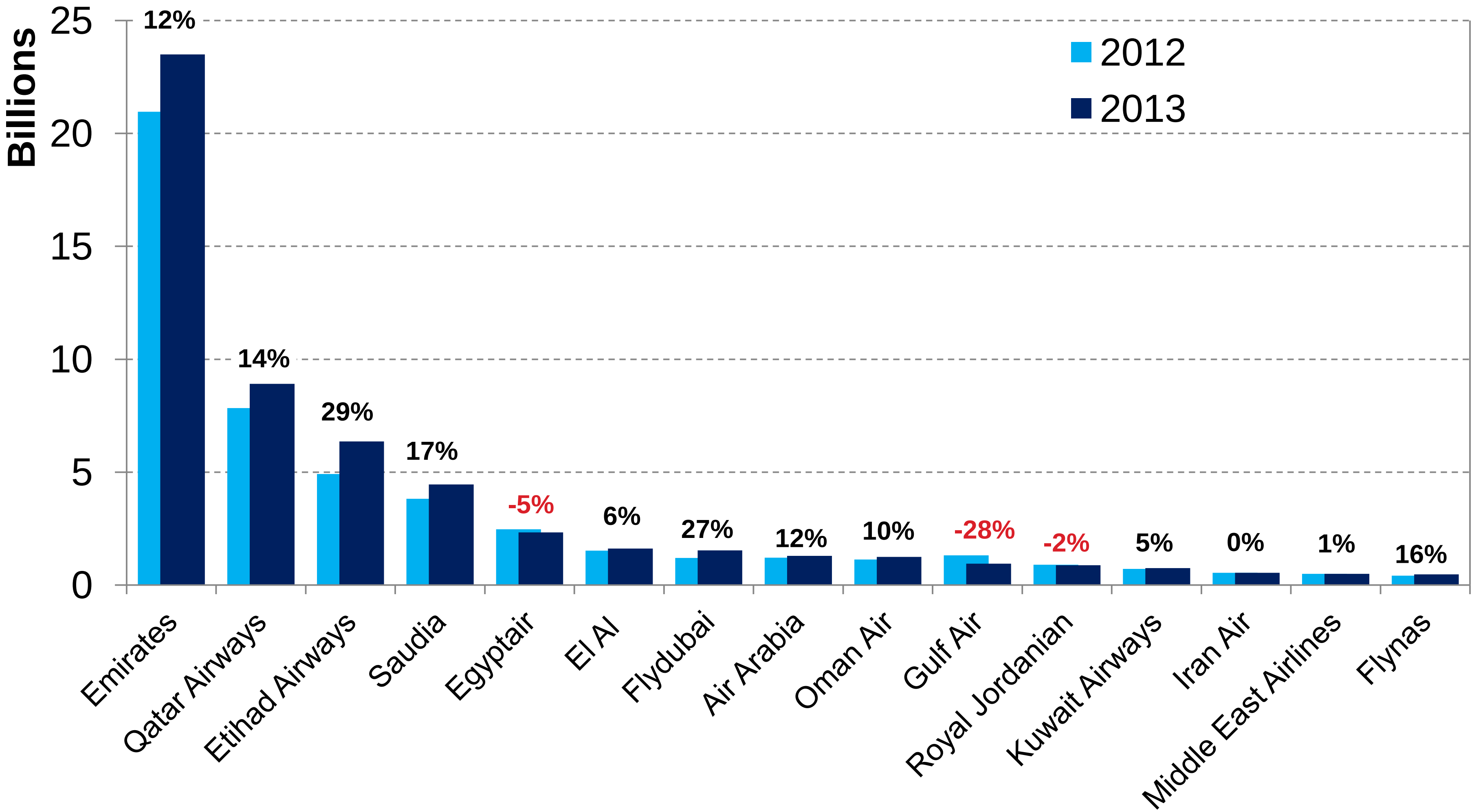
Seat Capacity by region

To/from the Middle East, Dec 2013, all airlines, Seats (millions)



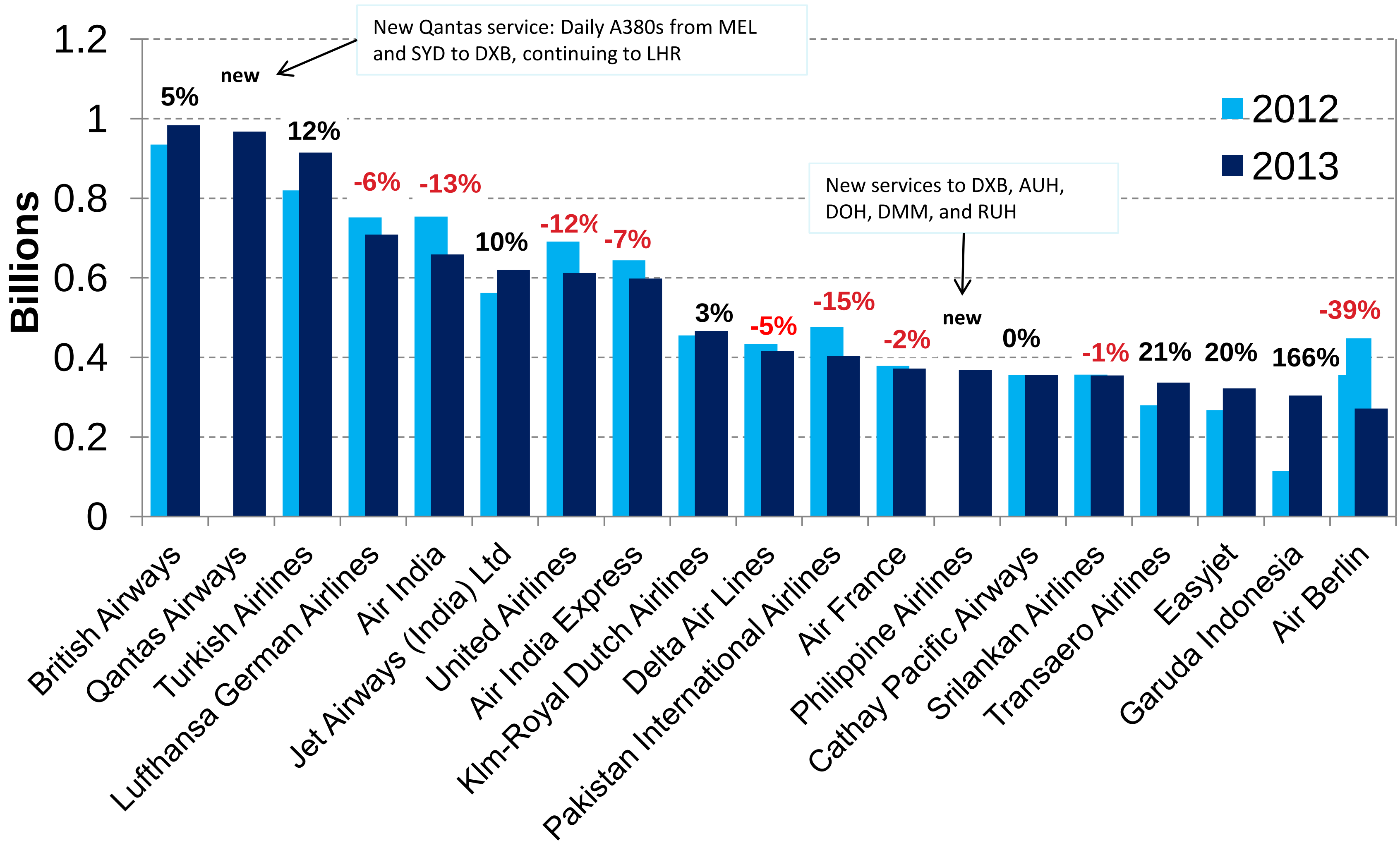
Capacity Changes Among Top Airlines

ASKs; Middle East Domiciled Carriers Dec. 2013 vs. Dec. 2012



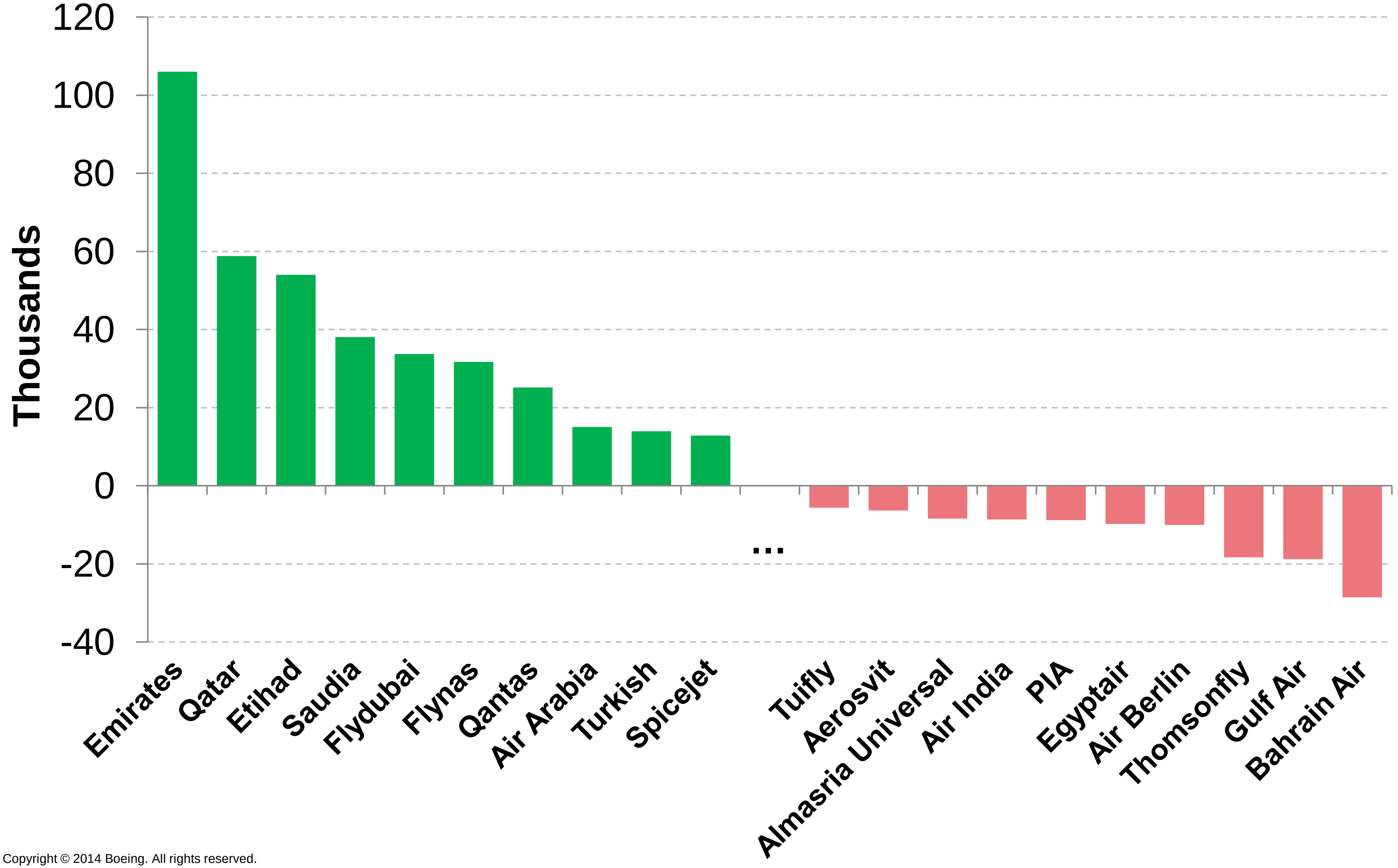
Capacity Changes Among Top Carriers

Carriers domiciled outside region; Middle East ASKs Dec. 2013 vs. Dec. 2012



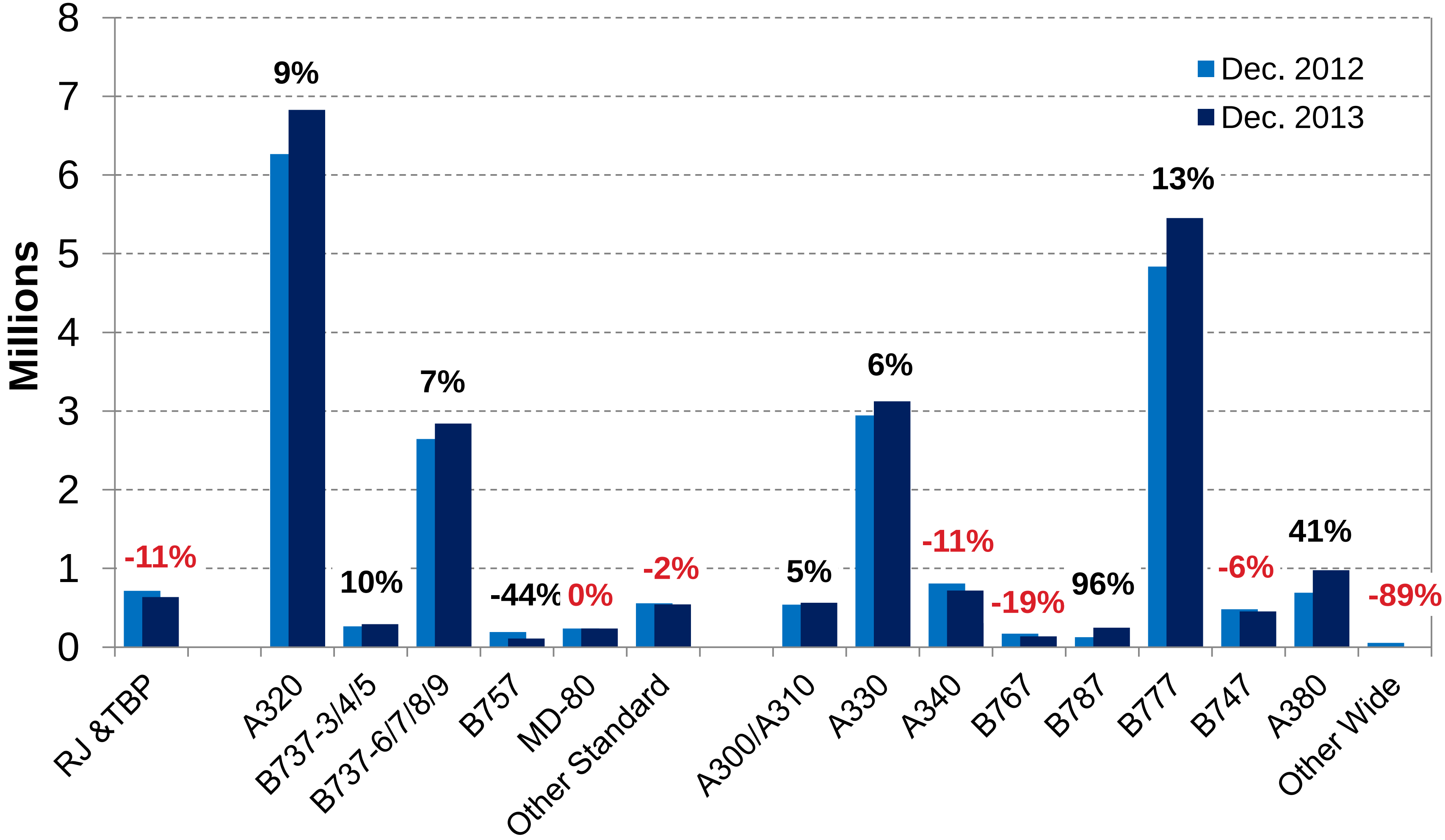
Largest Capacity Changes - Airlines

Weekly seats to/from/within Middle East



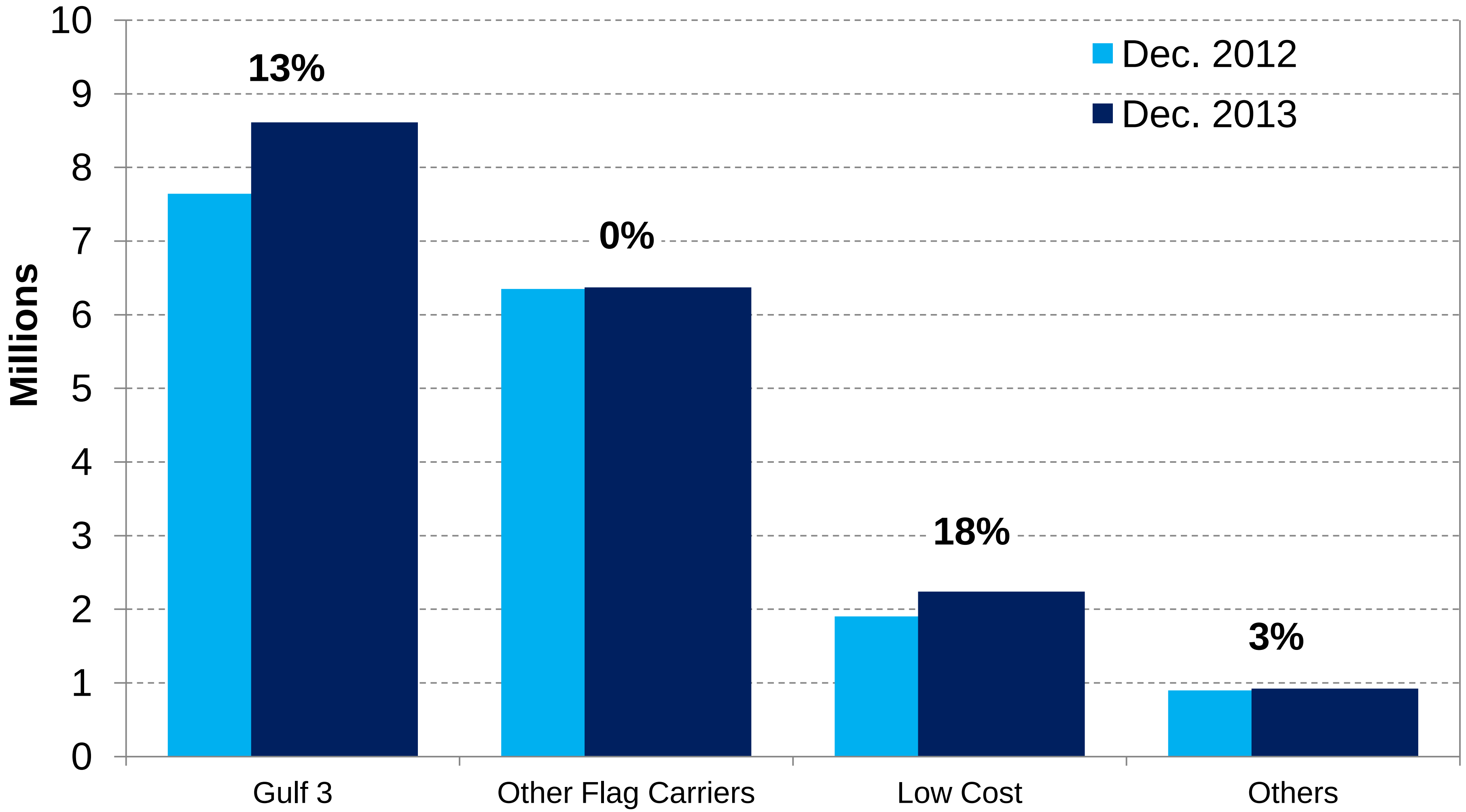
Equipment Usage

December seats to/from/within Middle East; all airlines



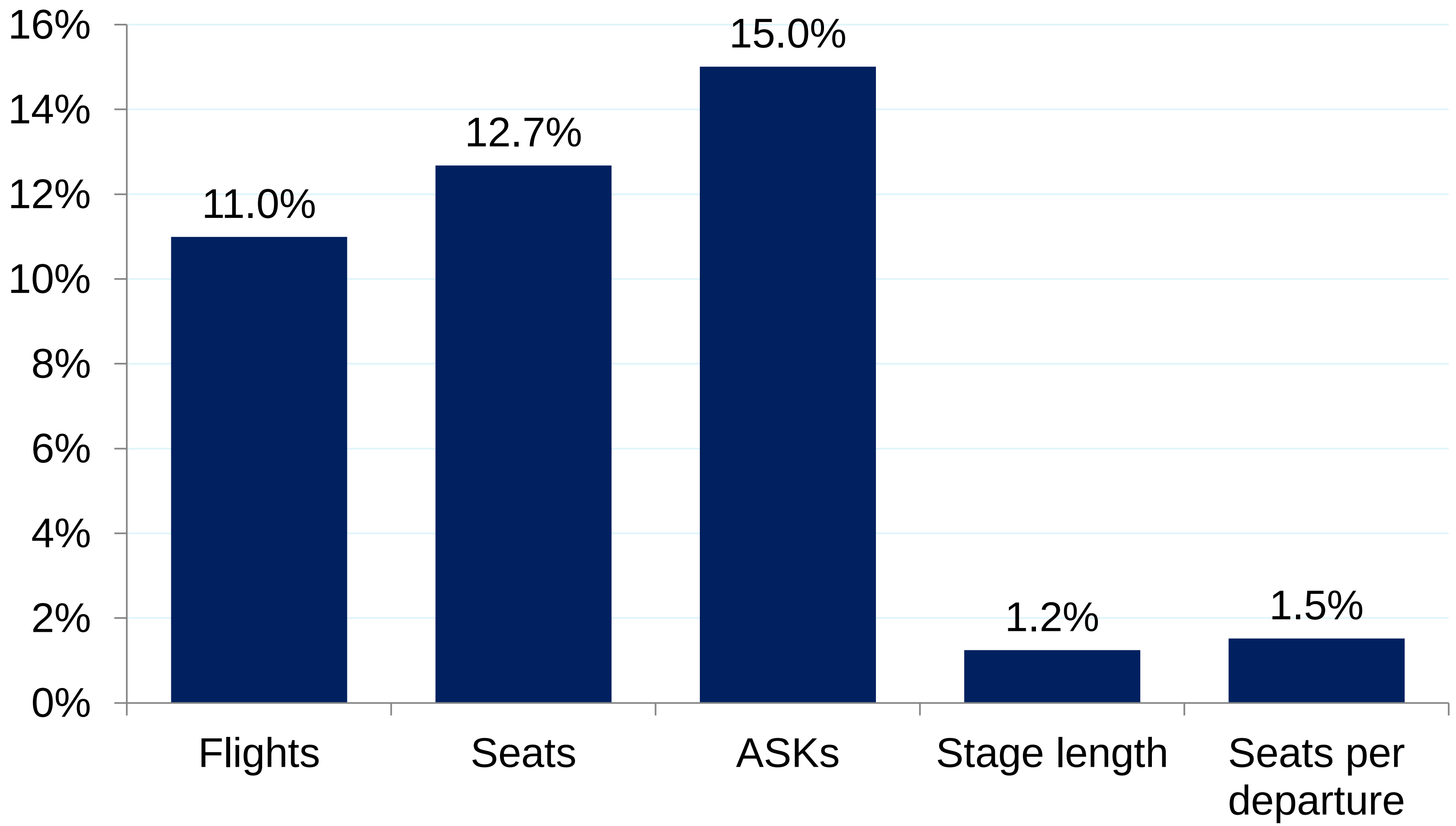
Capacity Changes by Business Model

Seats; Middle East Domiciled Carriers Dec. 2013 vs. Dec. 2012



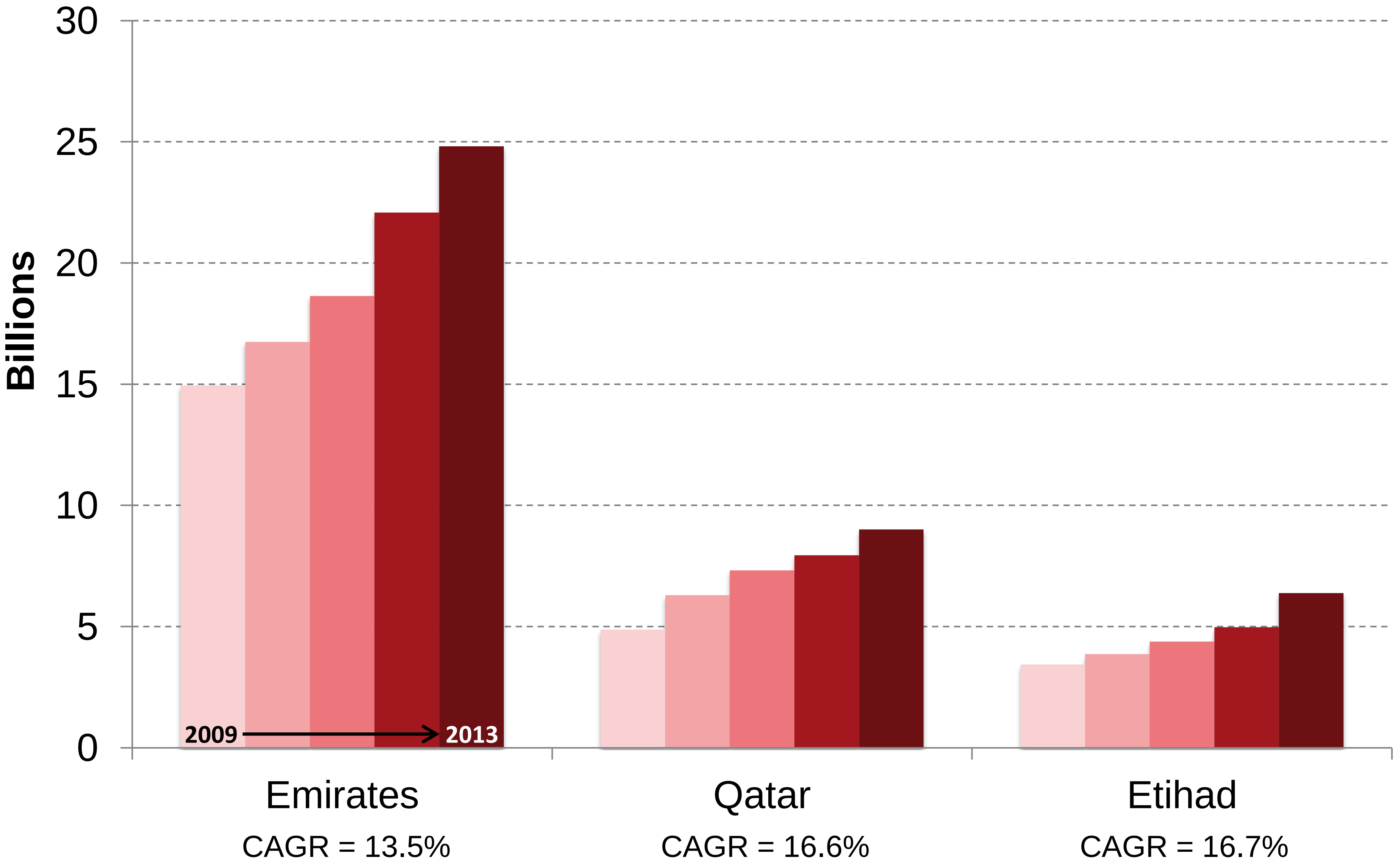
Middle East Capacity – Gulf 3

December 2013 vs. December 2012; all traffic flows



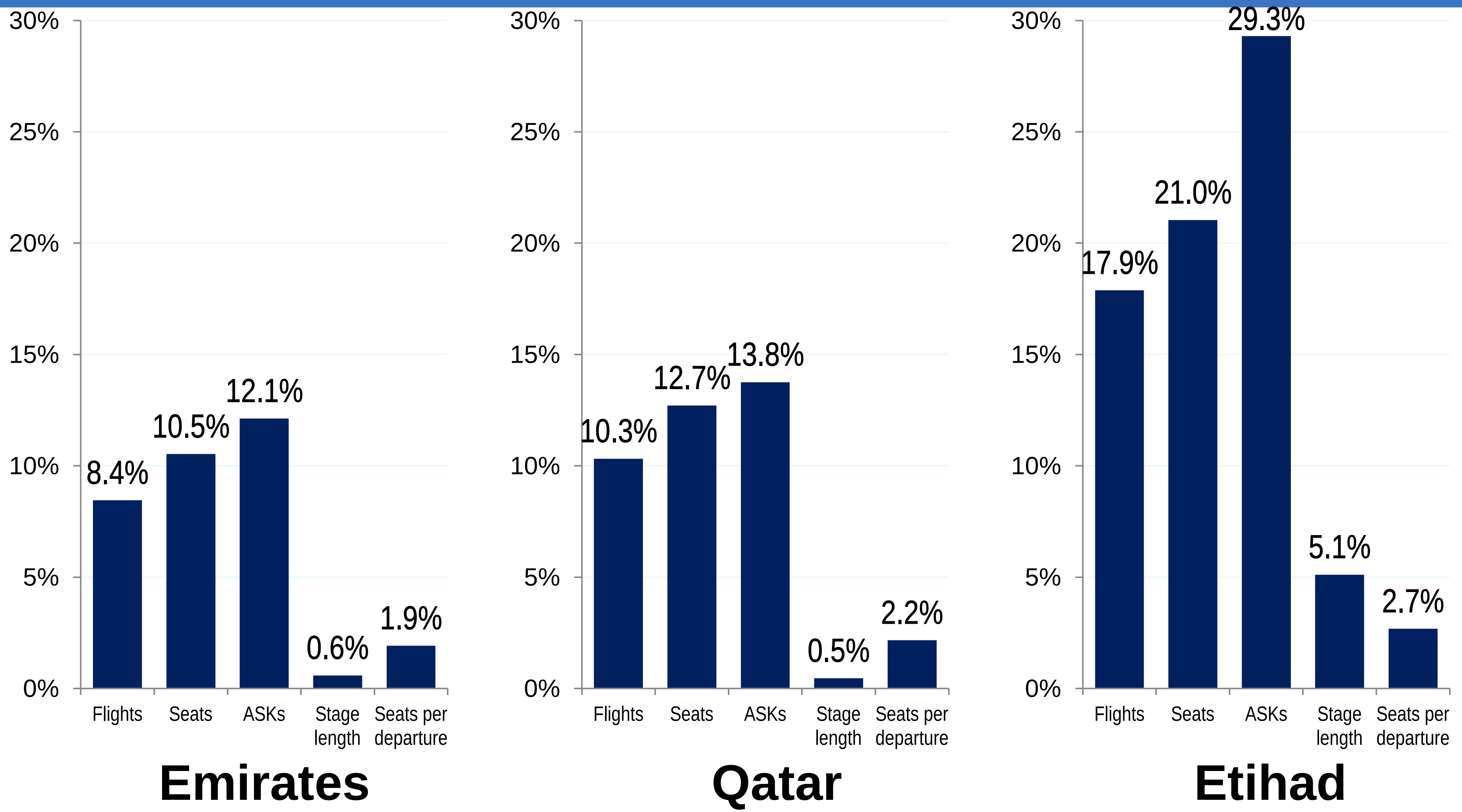
Gulf 3 Capacity, 2009-2013 (December)

ASK development – Emirates, Qatar, and Etihad



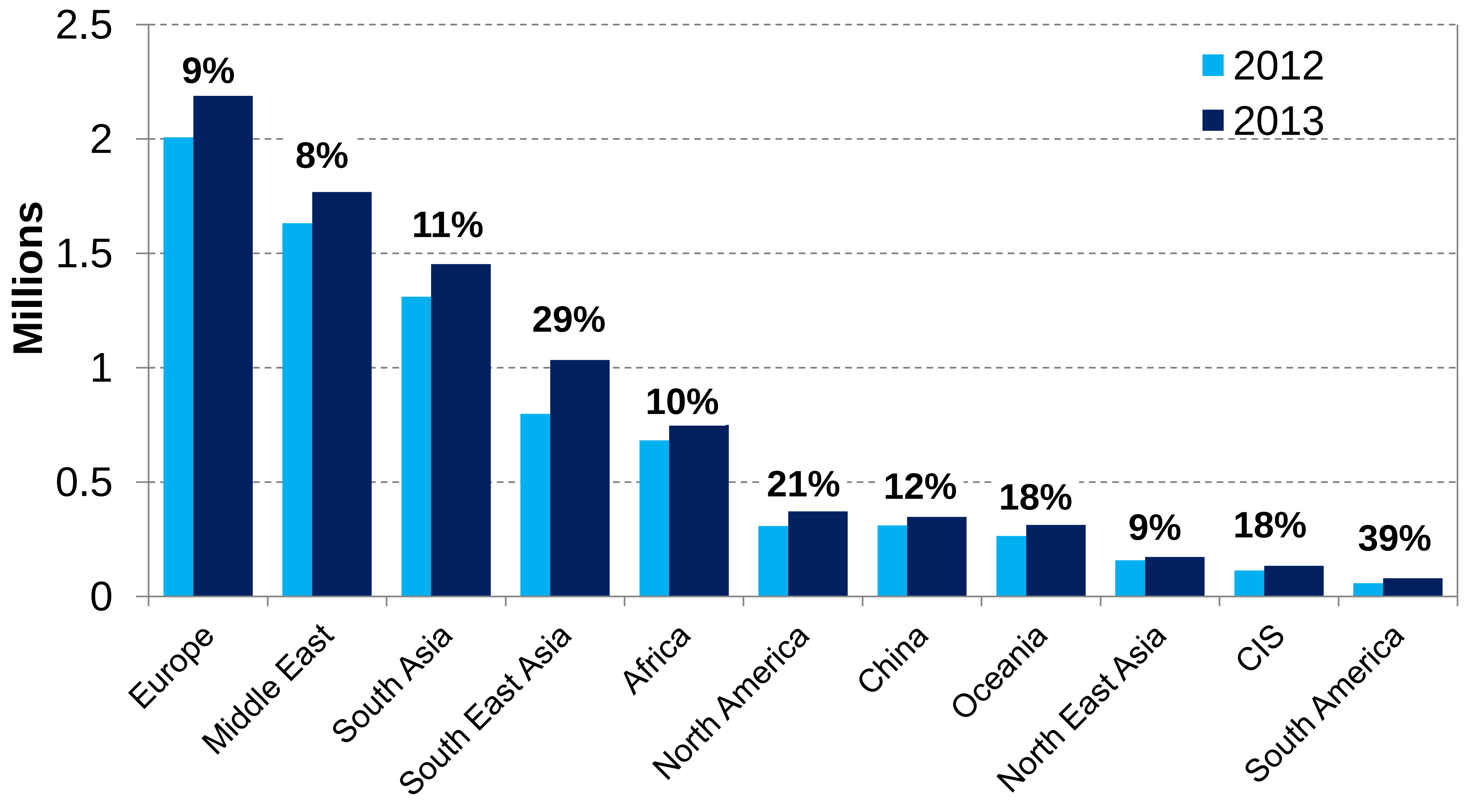
Gulf 3 – growth rates by airline

Dec. 2013 vs. Dec. 2012; all traffic flows to/from/within Middle East

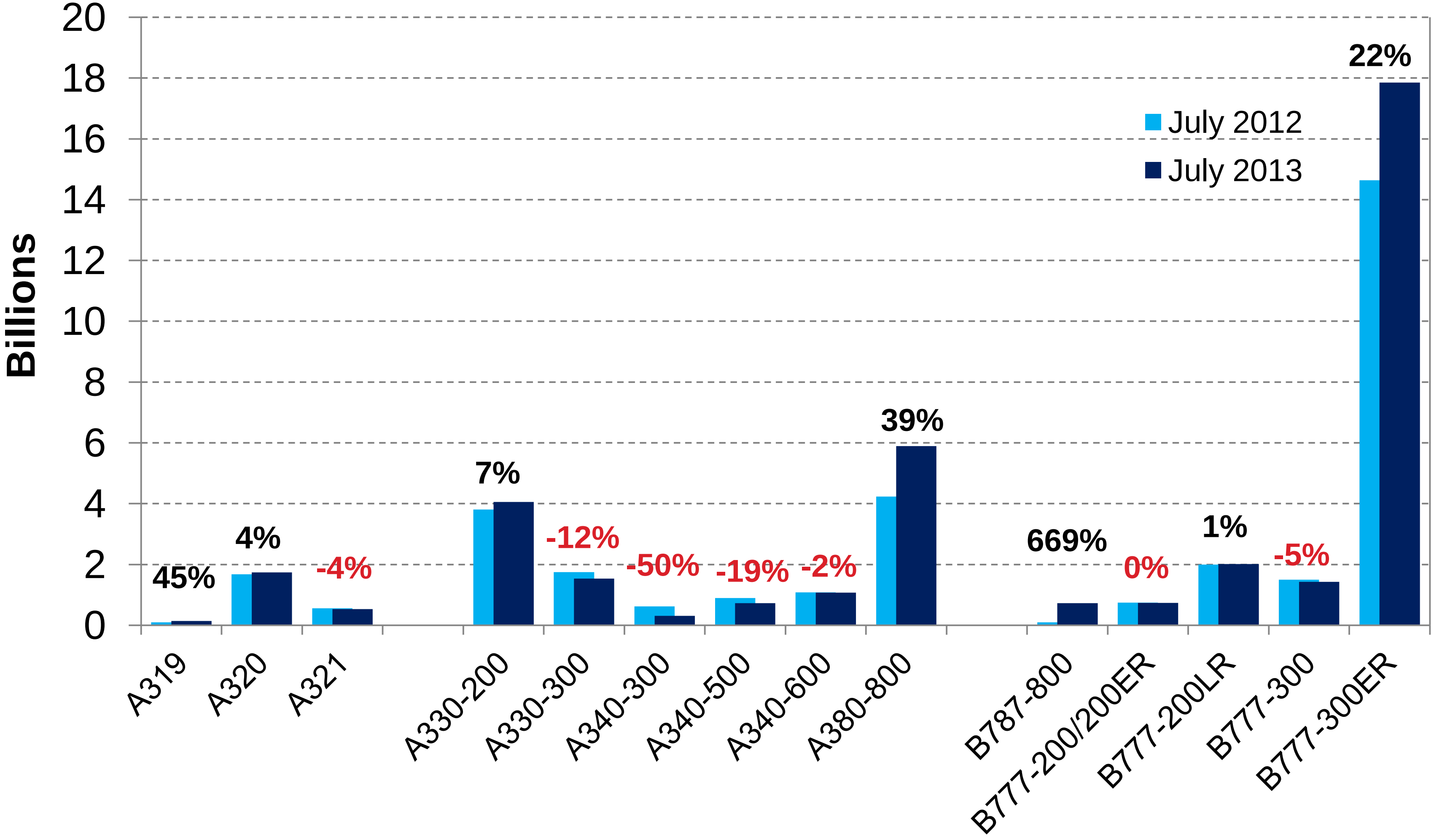


Gulf 3 flows to/from/within the Middle East

Seats; December 2013 vs. December 2012

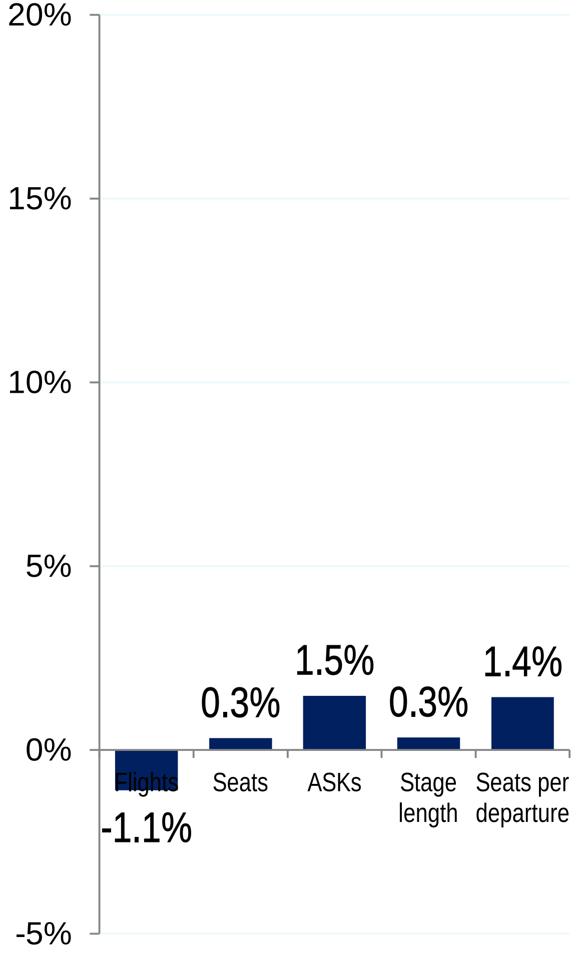


Equipment Usage – Gulf 3
December ASKs Billion



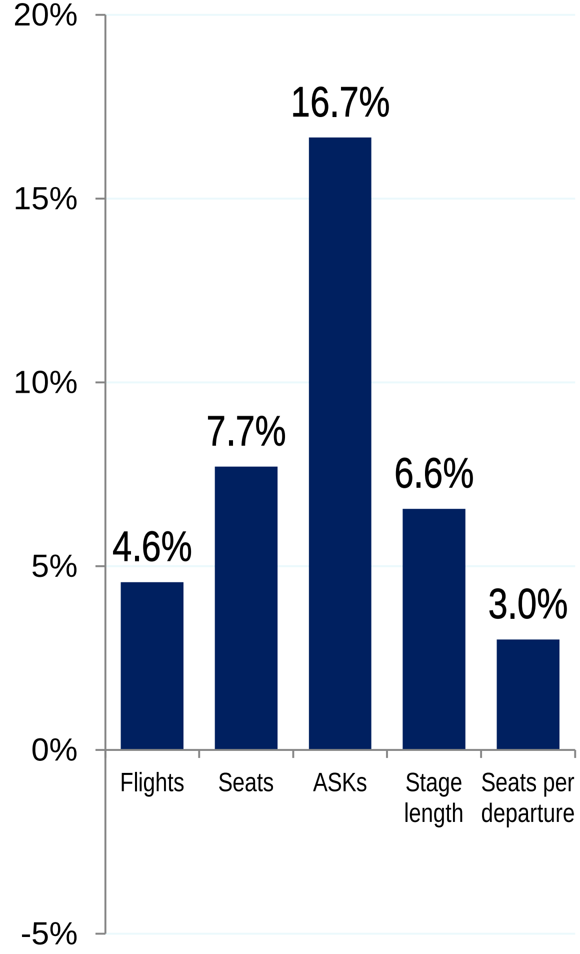
Flag Carriers – capacity Growth

December 2013 vs. December 2012; all traffic flows

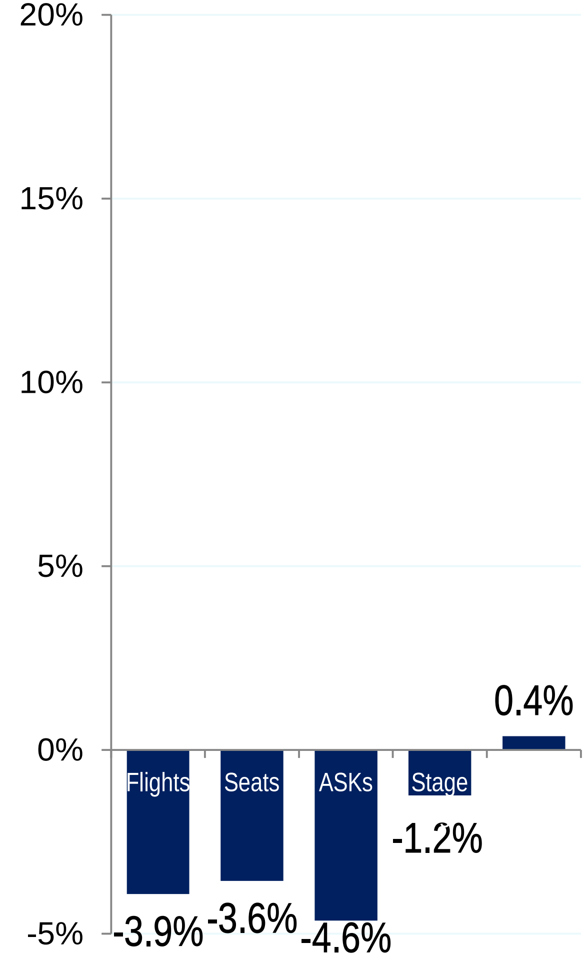


Flag carriers*

* Does not include G3



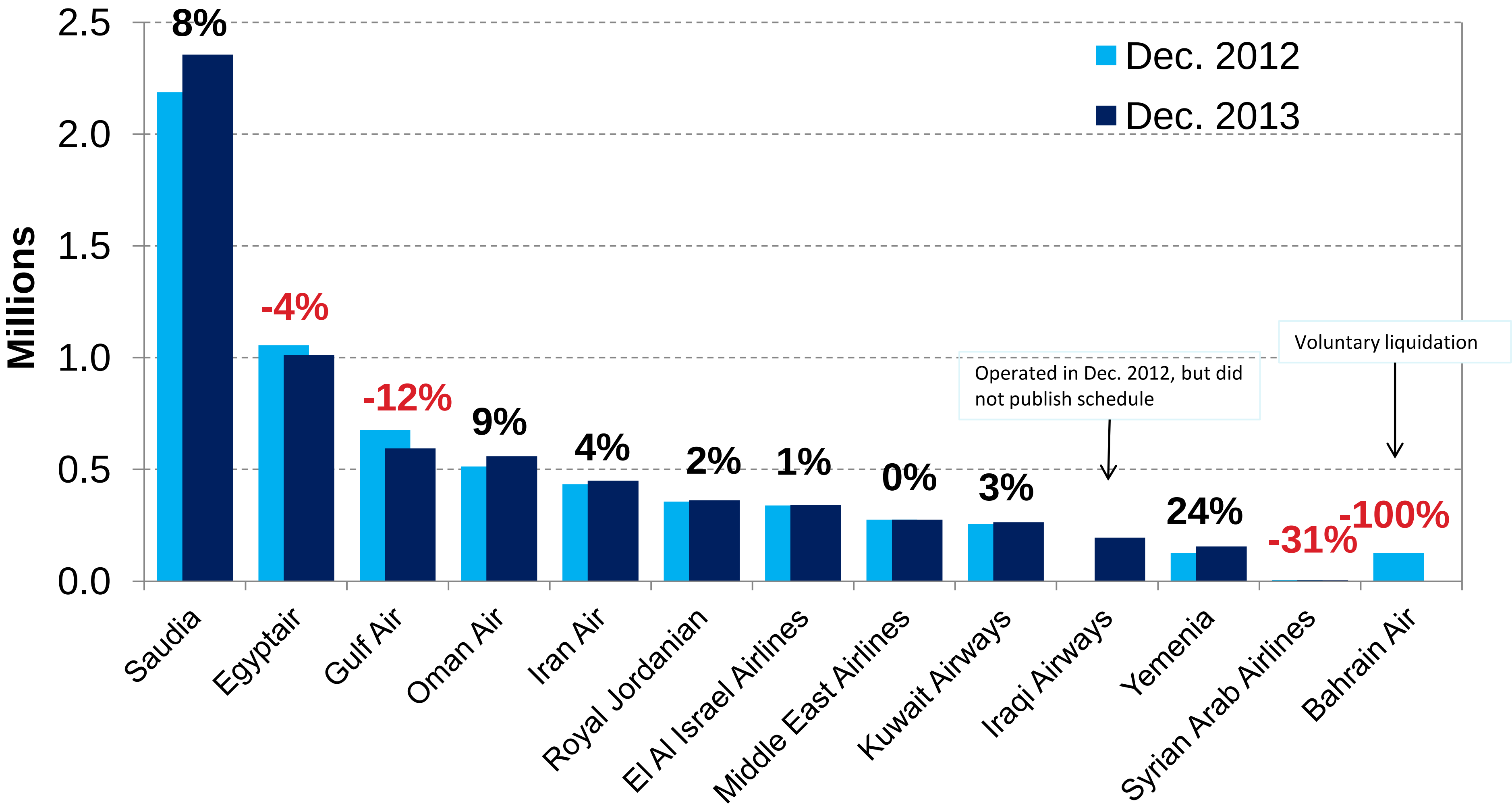
Saudia



Flag carriers ex. Saudia

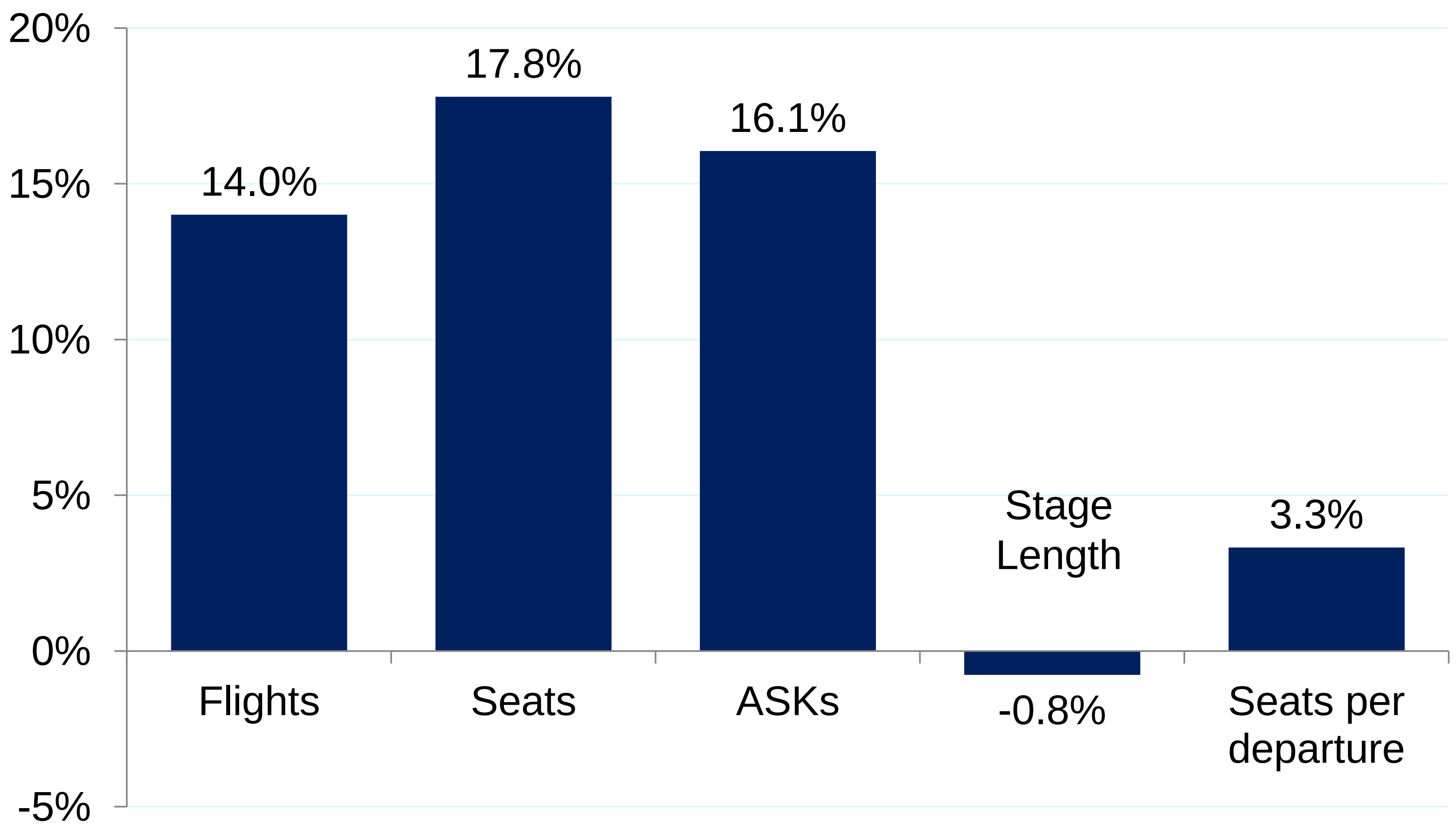
Capacity Changes by Airline – Flag Carriers

Seats; Dec. 2013 vs. Dec. 2012



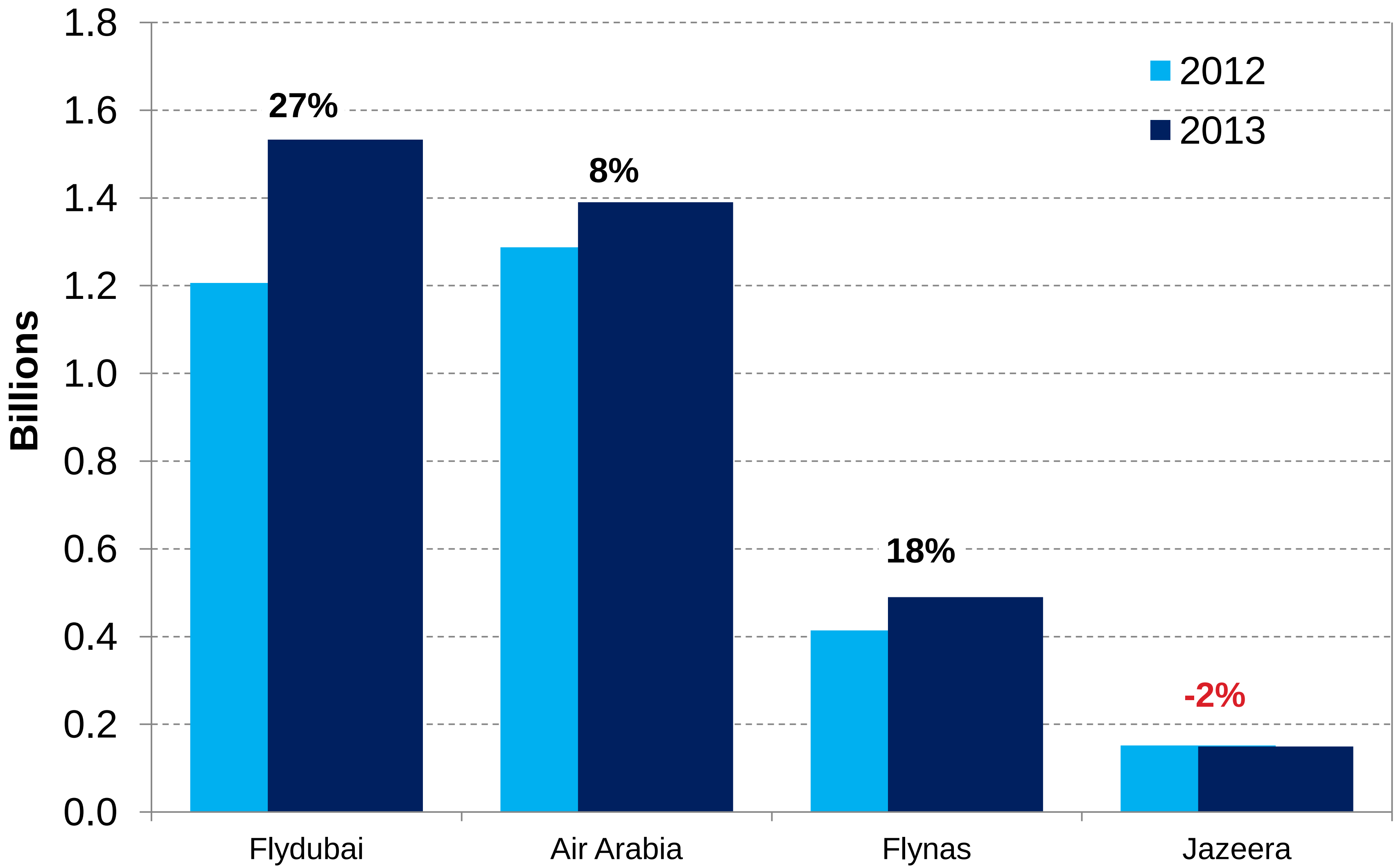
Middle East Capacity – Low-cost airlines

December 2013 vs. December 2012; all traffic flows



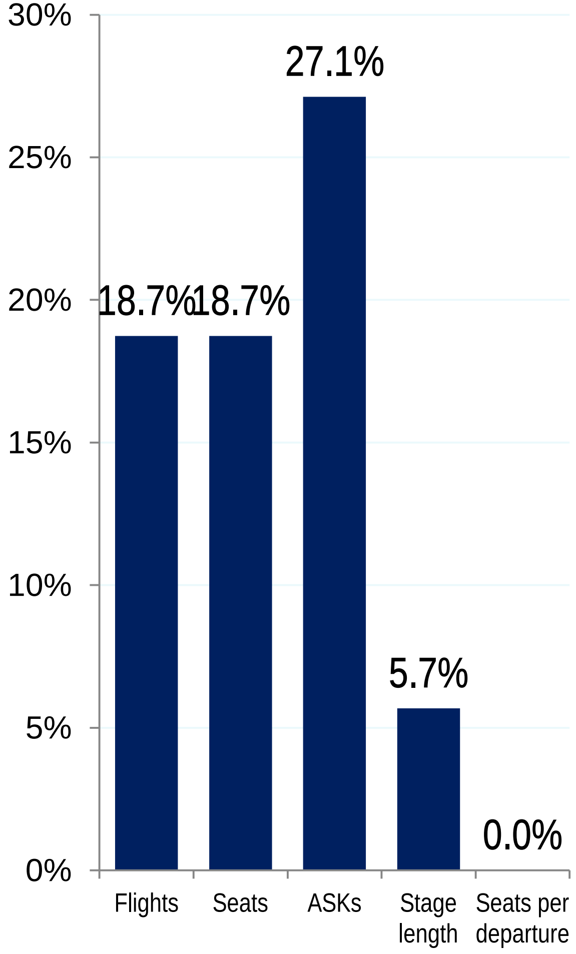
LCC Capacity by Airline

ASKs; December 2013 vs. December 2012

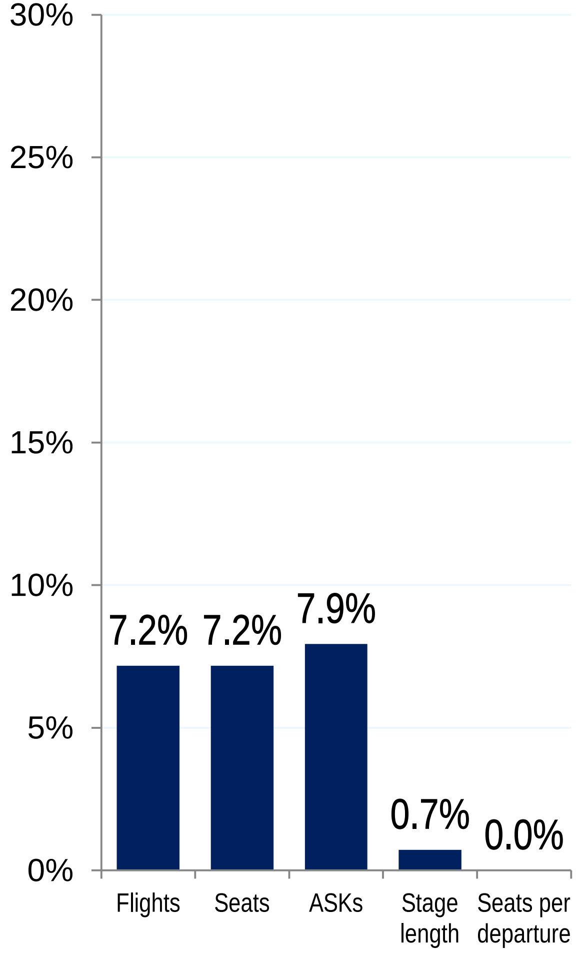


LCCs – growth rates by airline

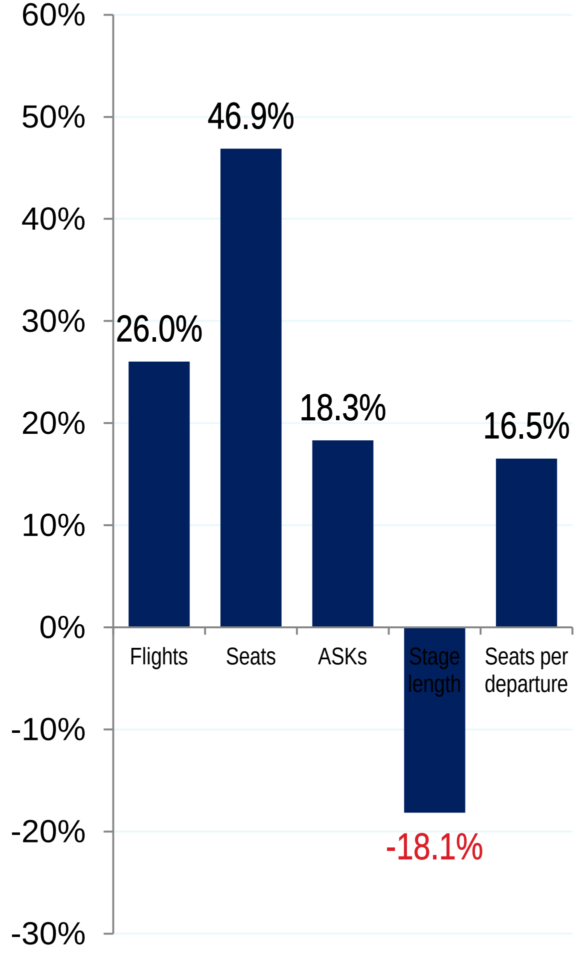
Dec. 2013 vs. Dec. 2012; all traffic flows to/from/within Middle East



Flydubai



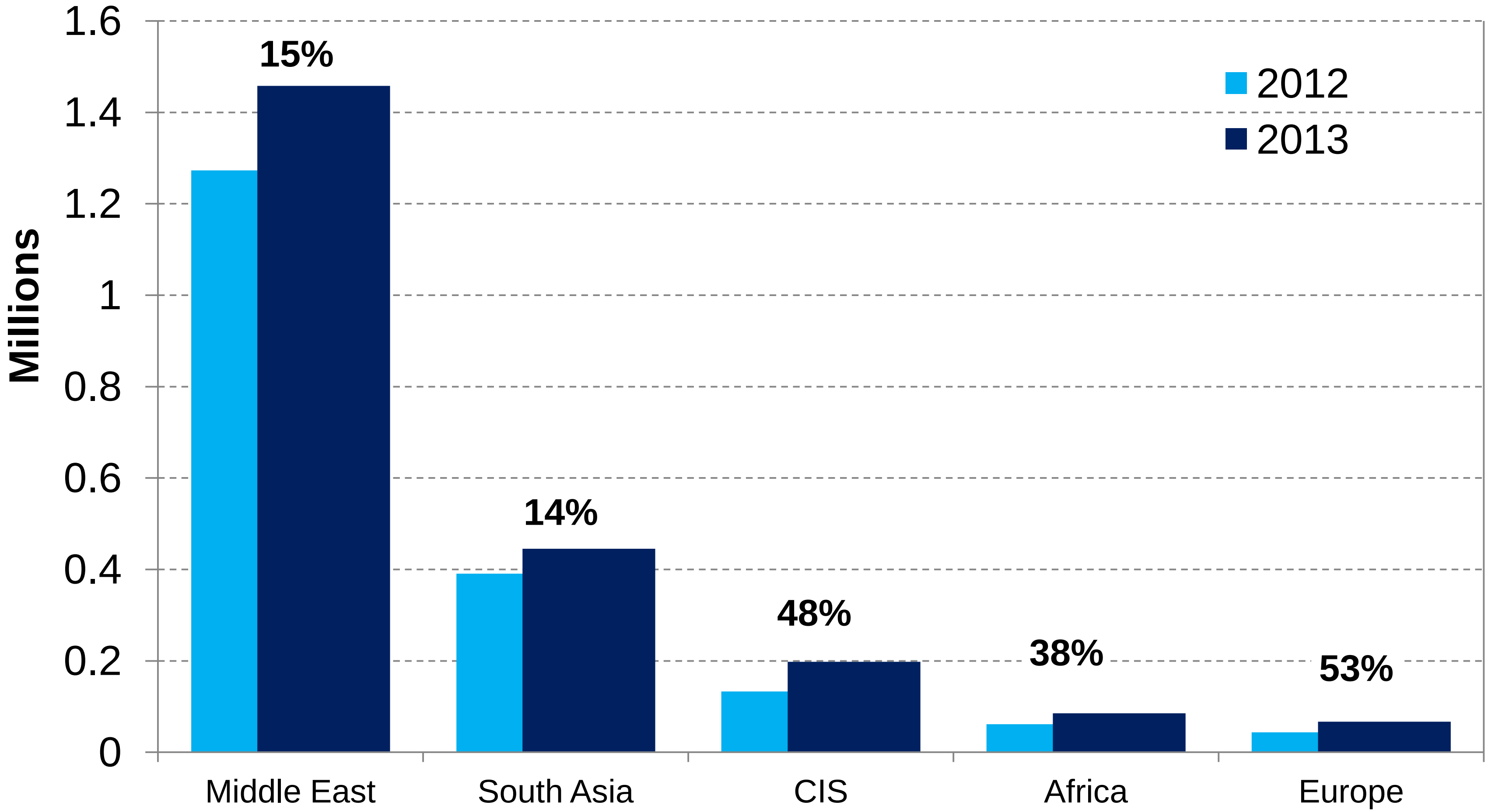
Air Arabia



Flynas

LCC flows to/from/within the Middle East

Seats; December 2013 vs. December 2012



Questions?