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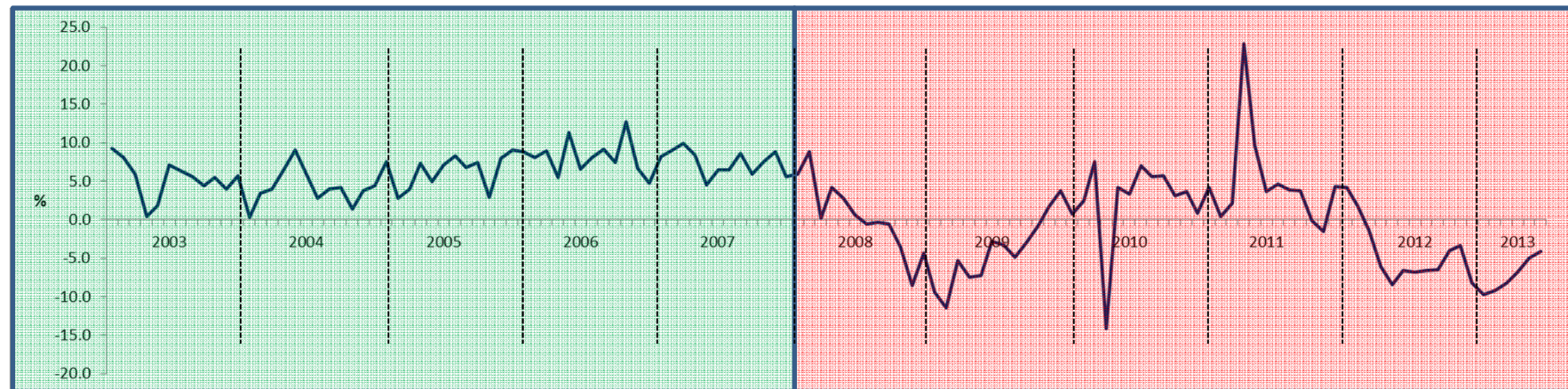


State of the Industry Address

Marc Lamidey
ERA President



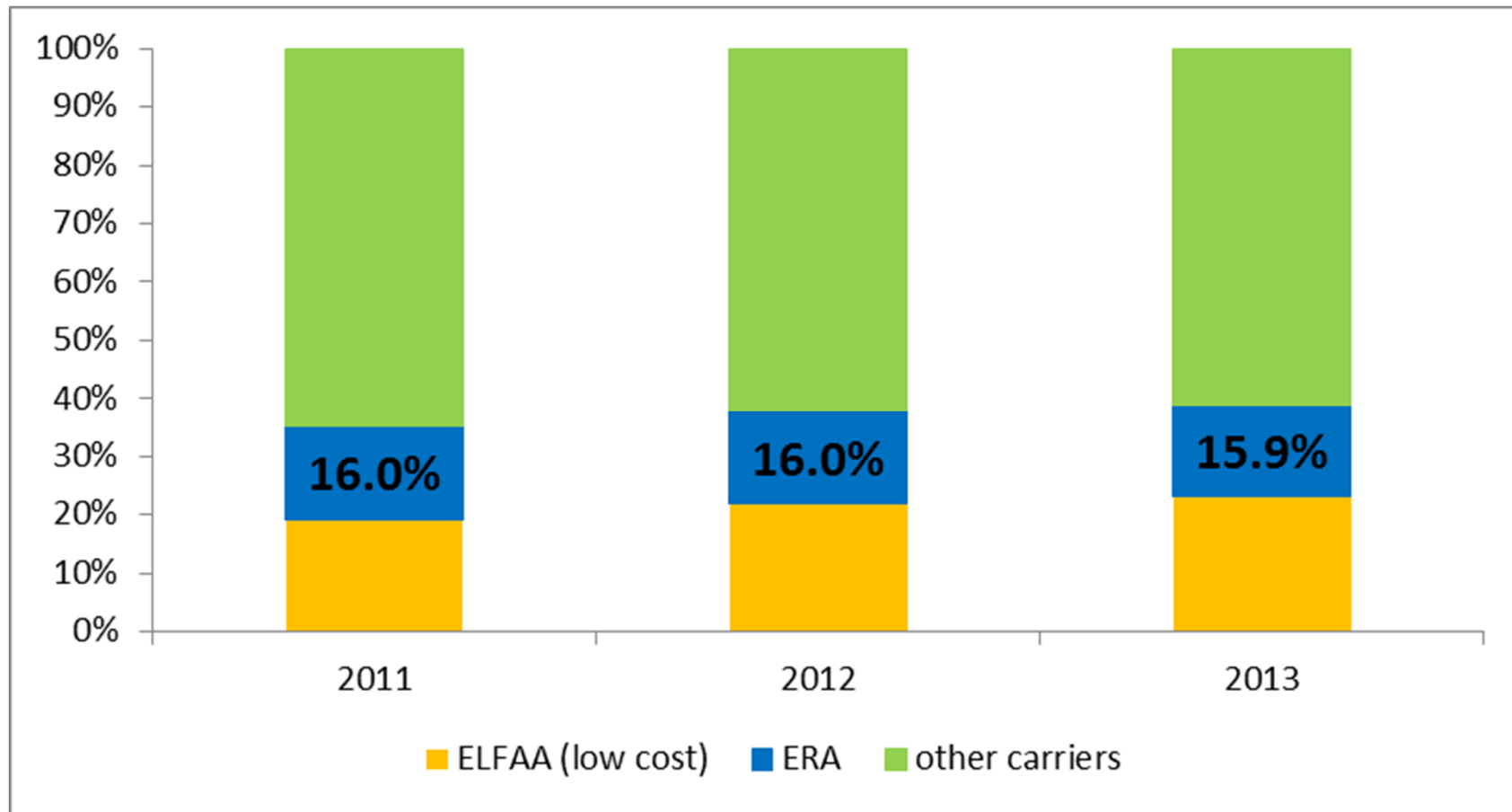
Scheduled Passenger Growth (%)



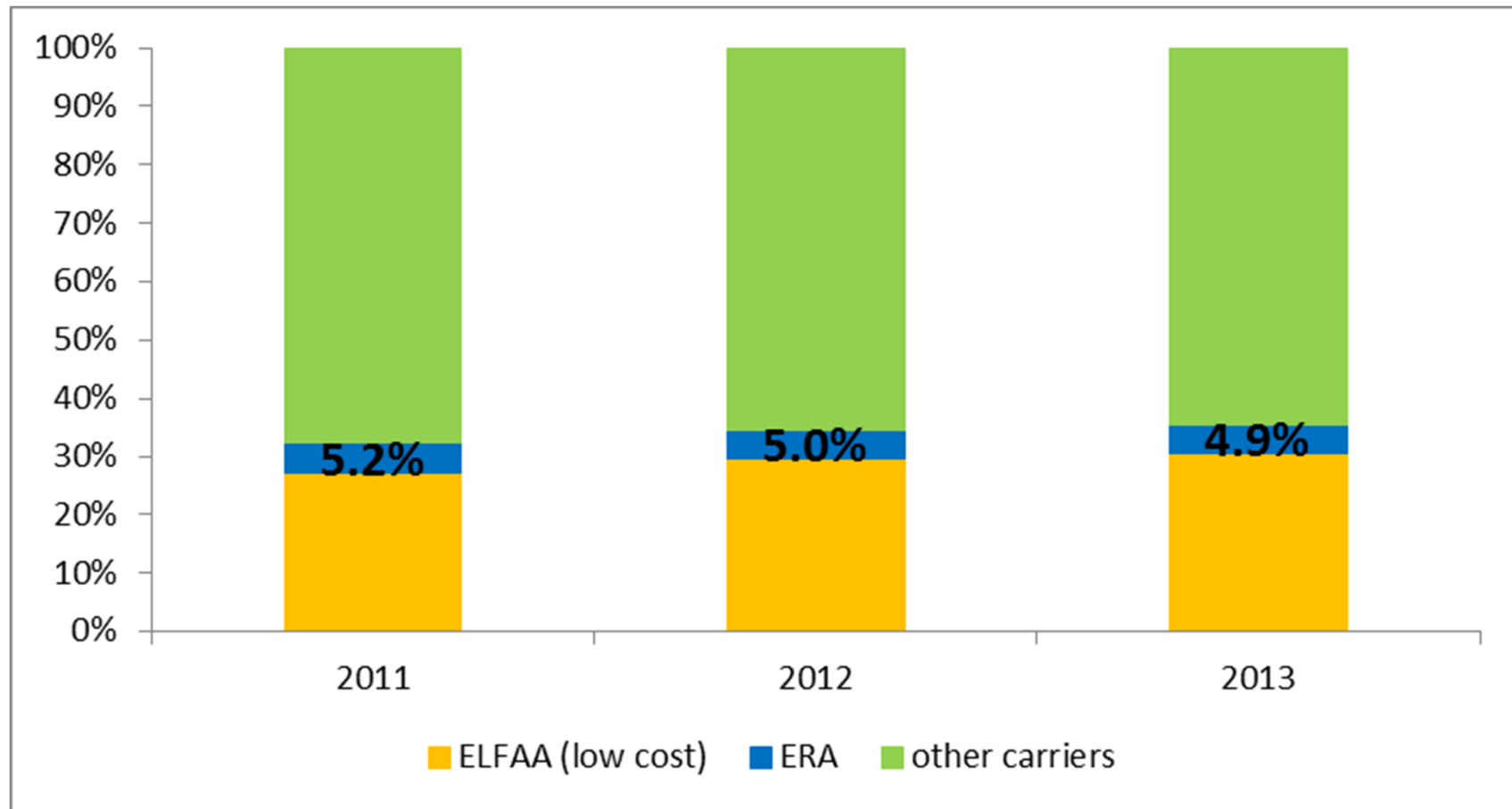
Source: ERA reporting airlines – year to year % change by month



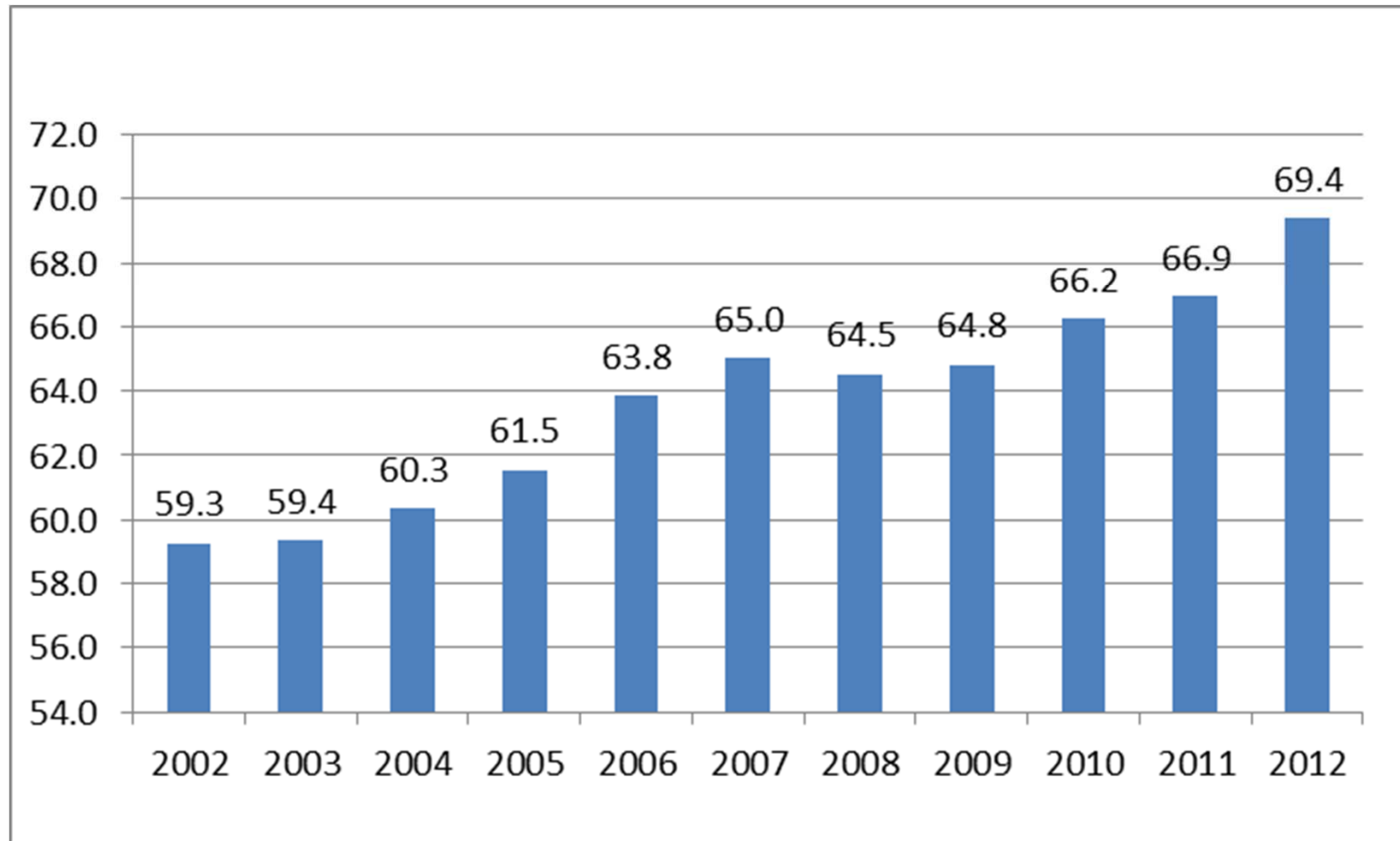
Market Share – intra-EU flights



Market Share – intra-EU seats



Load Factor

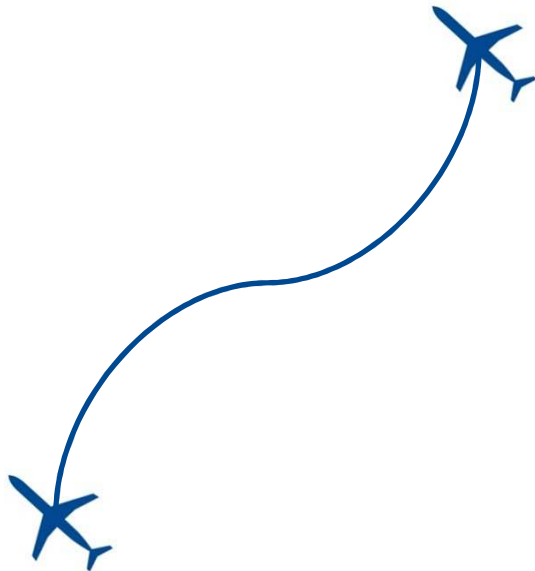


Source: ERA reporting airlines



Sector Time & Aircraft Size

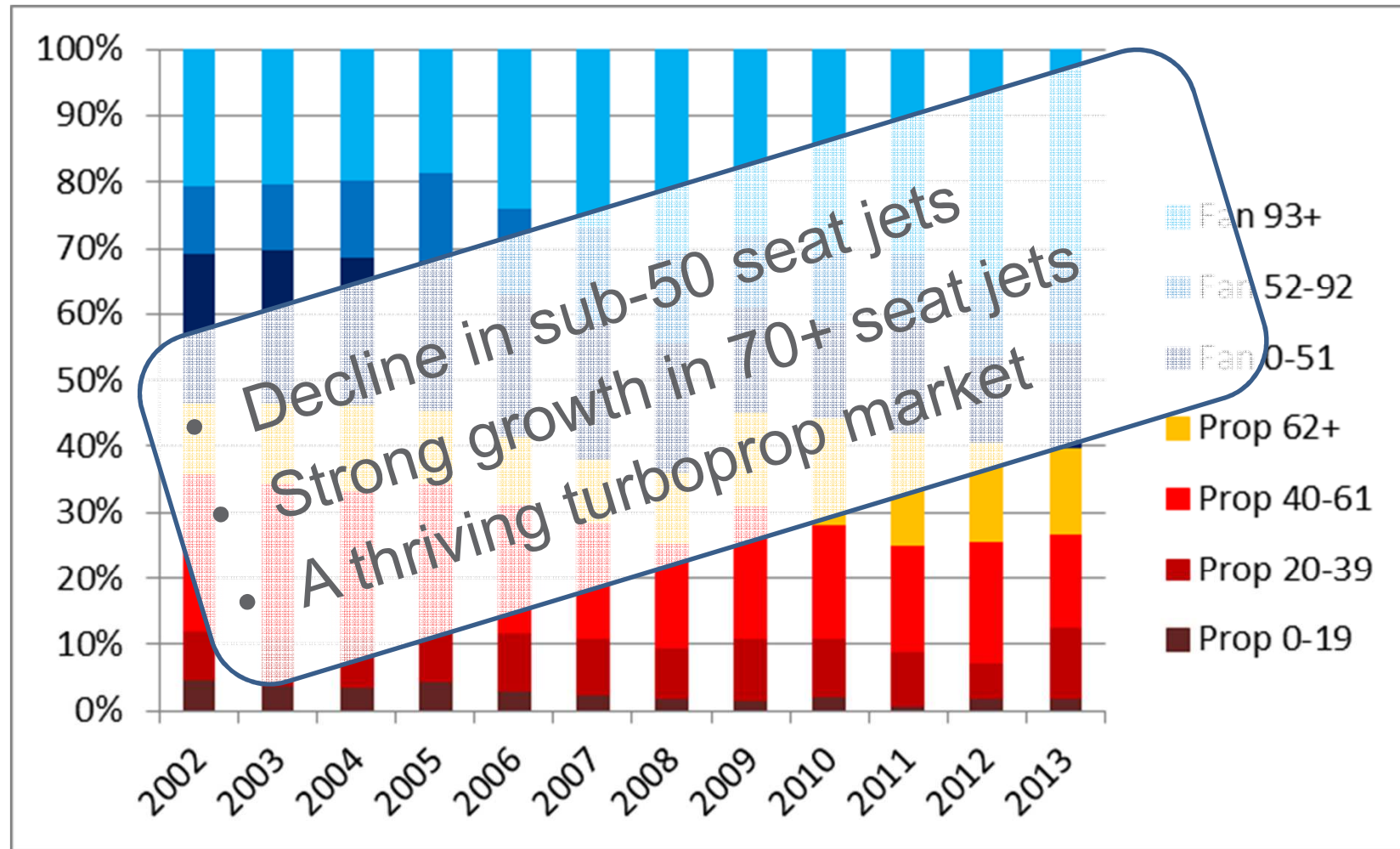
69 Minutes
Average Sector Time



83 Seats
Average Aircraft Size



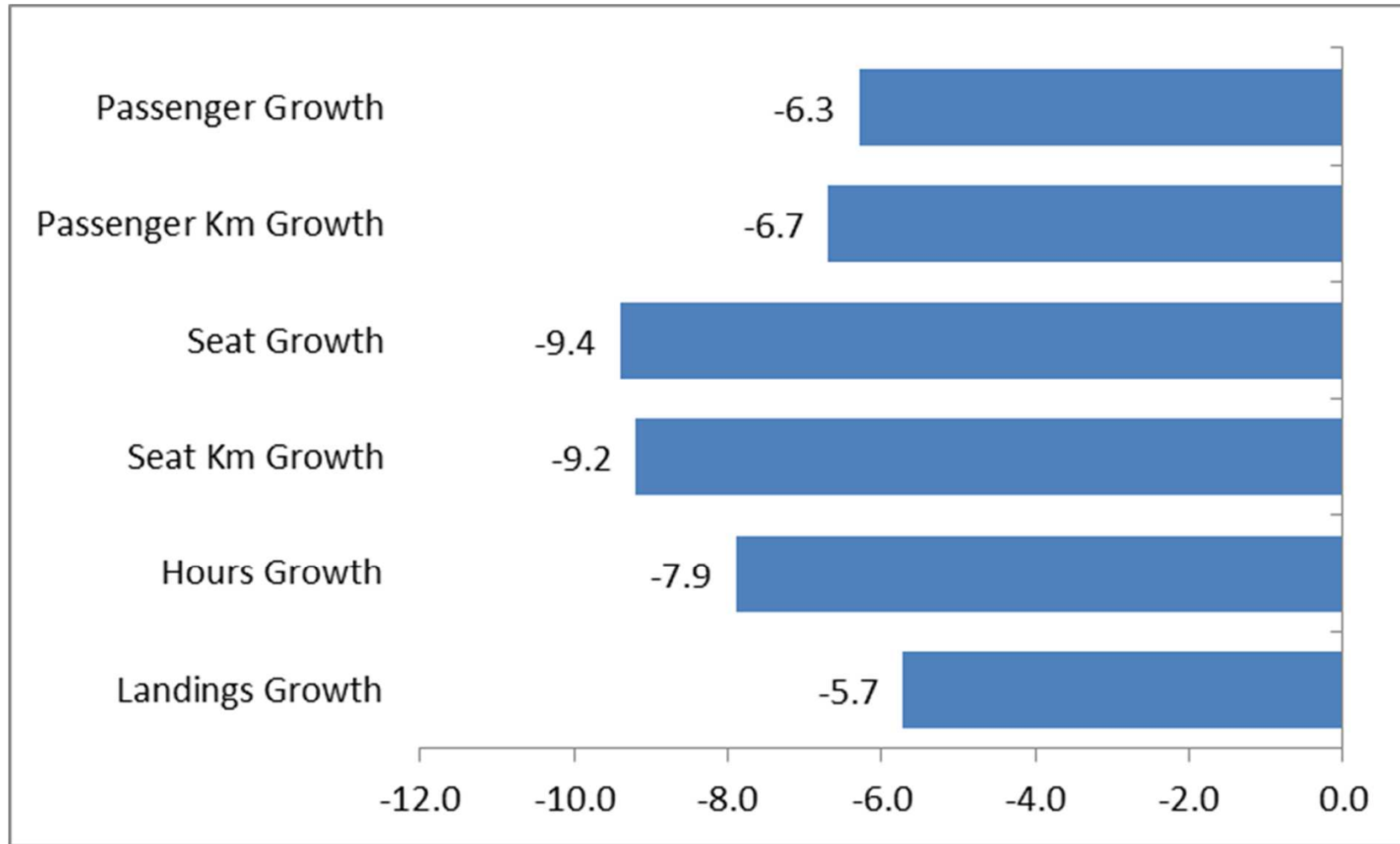
Fleet split



Source: Flightglobal



Key Indicators - Jan-Jul 2013 (%)

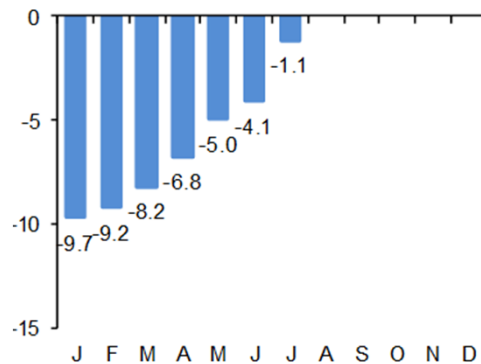


Source: ERA reporting airlines – Jan-Jul 2013 year on year % change

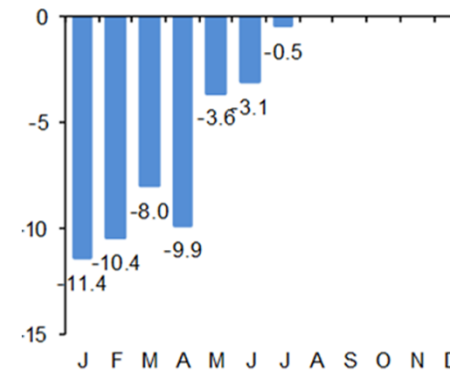


Key Indicators - Jan-Jul 2013 (%)

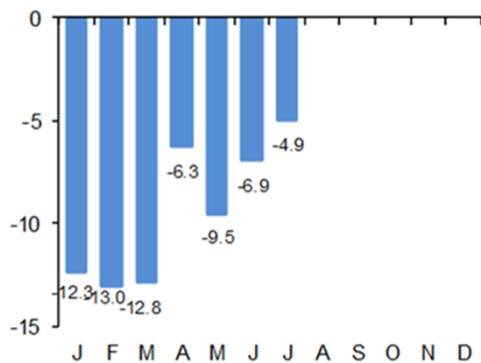
% Passenger Growth



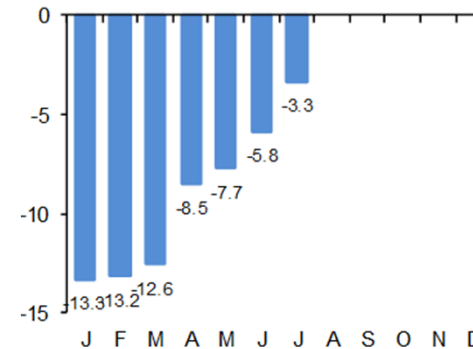
% RPK* Growth



% Seat Growth



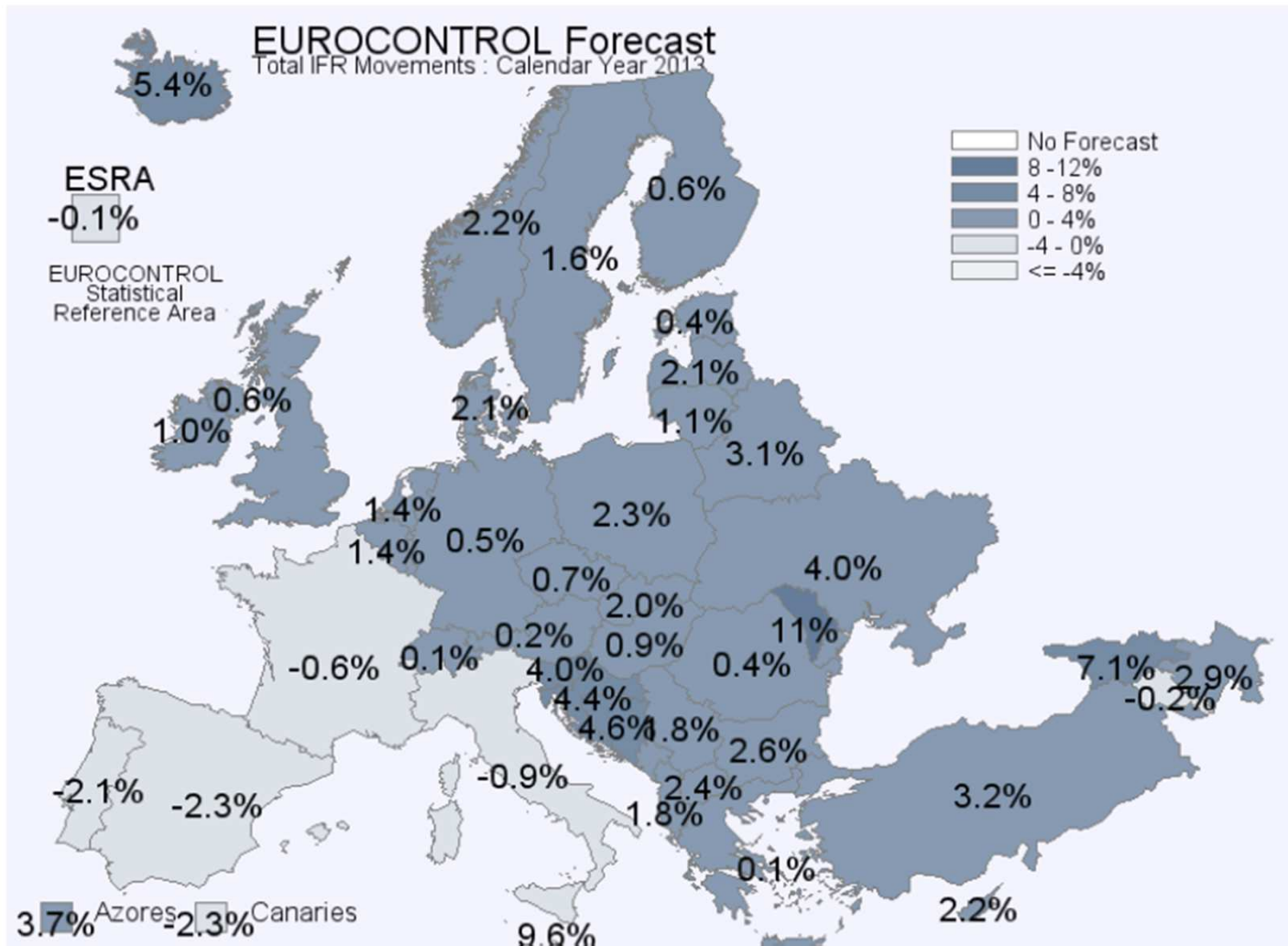
% ASK* Growth



Source: ERA reporting airlines – Jan-July 2013 month on month % change



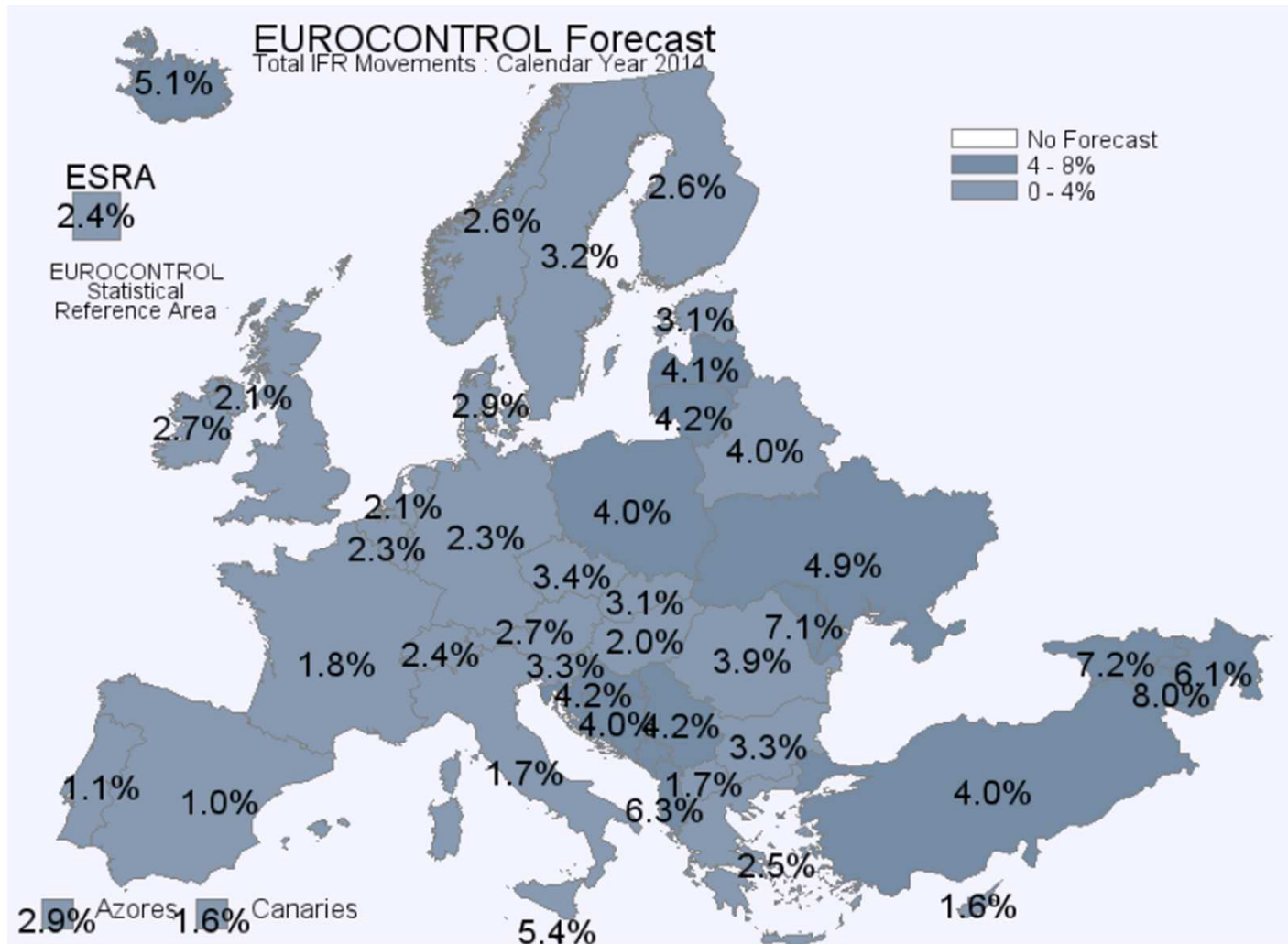
2013 Flight Growth Forecast



Source: Eurocontrol



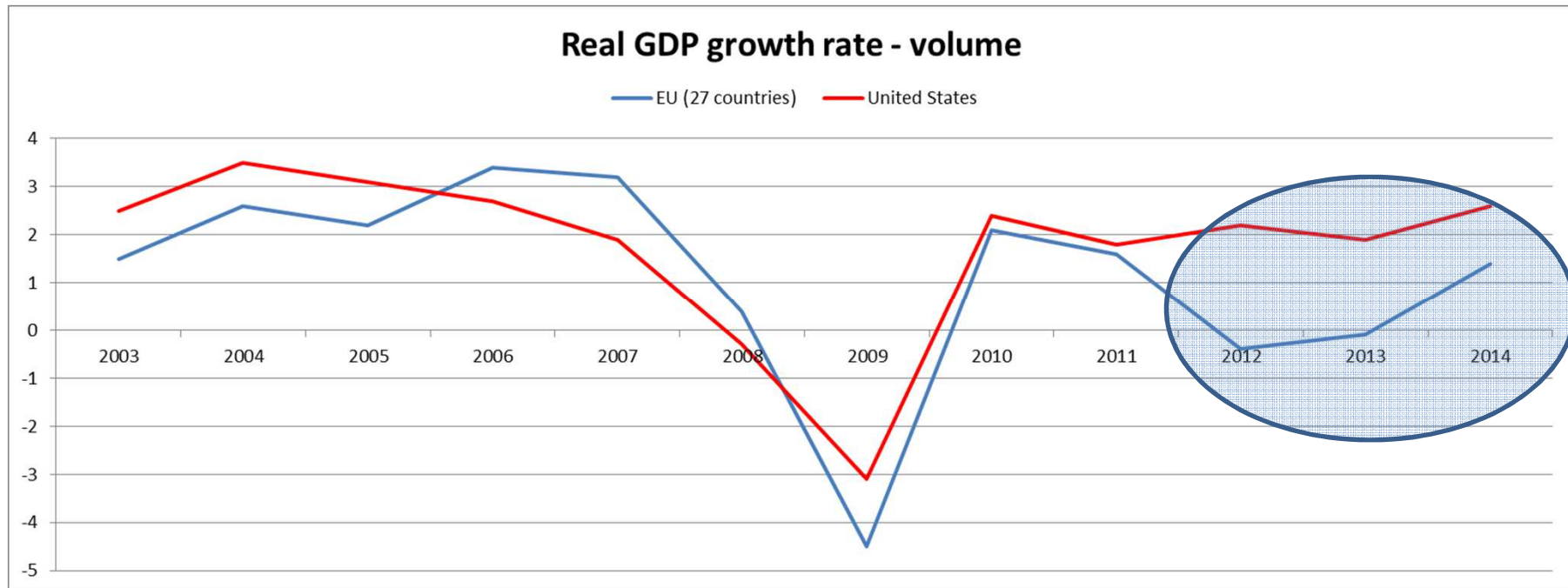
2014 Flight Growth Forecast



Source: Eurocontrol



GDP Growth – EU and US (%)



Source: Eurostat



IATA July 2013 Assessment

- European carriers recorded a 3.7% increase in demand compared to July 2012, in line with year-to-date growth.
- The Eurozone emerged from its 18-month recession during the second quarter, **giving grounds for cautious optimism for the region's performance in the second half** tempered by significant variations by country.



Board activities

- 
- Strategic review
 - Overseeing the on-going work of ERA on
 - Membership
 - Finance
 - Regulatory Affairs
 - Communications
 - Events and business development

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