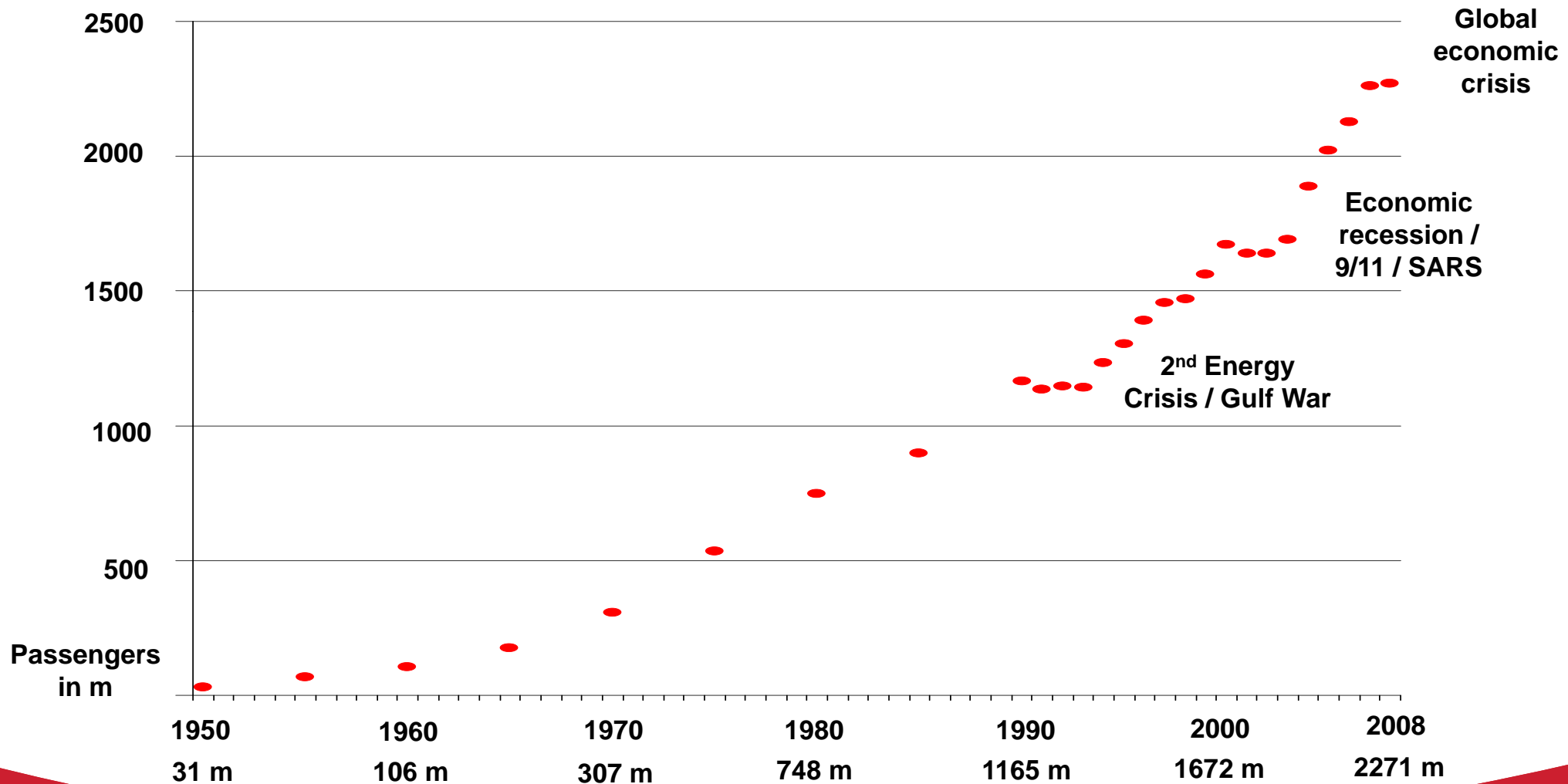


Market Development and Changing Business Models

Matthias von Randow, Air Berlin



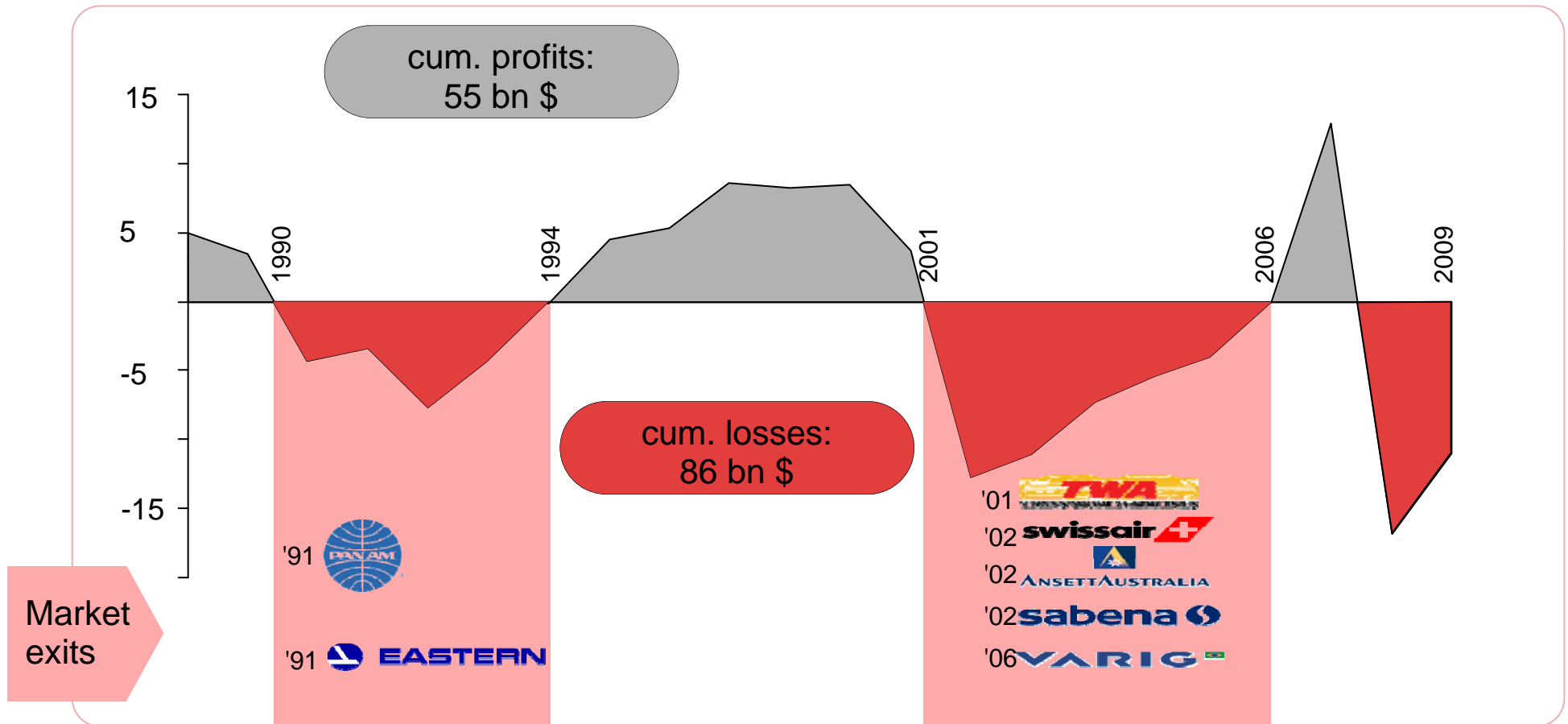
Continuous growth of the airline industry – In face of several crises passed through:



Source: ICAO

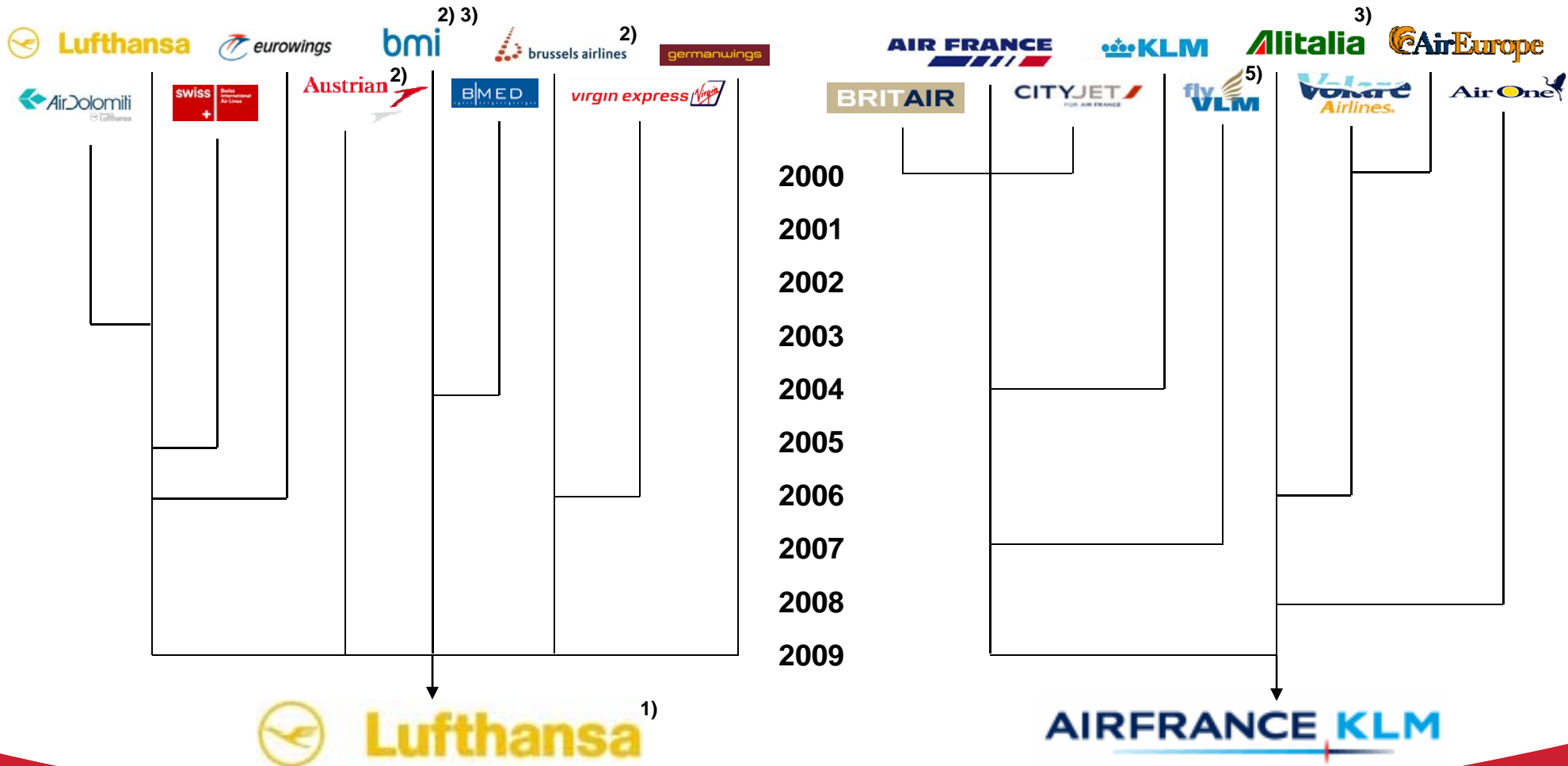
Despite continuous growth: On average the airlines were a loss-making industry

Profits and losses of global airlines [bn \$]



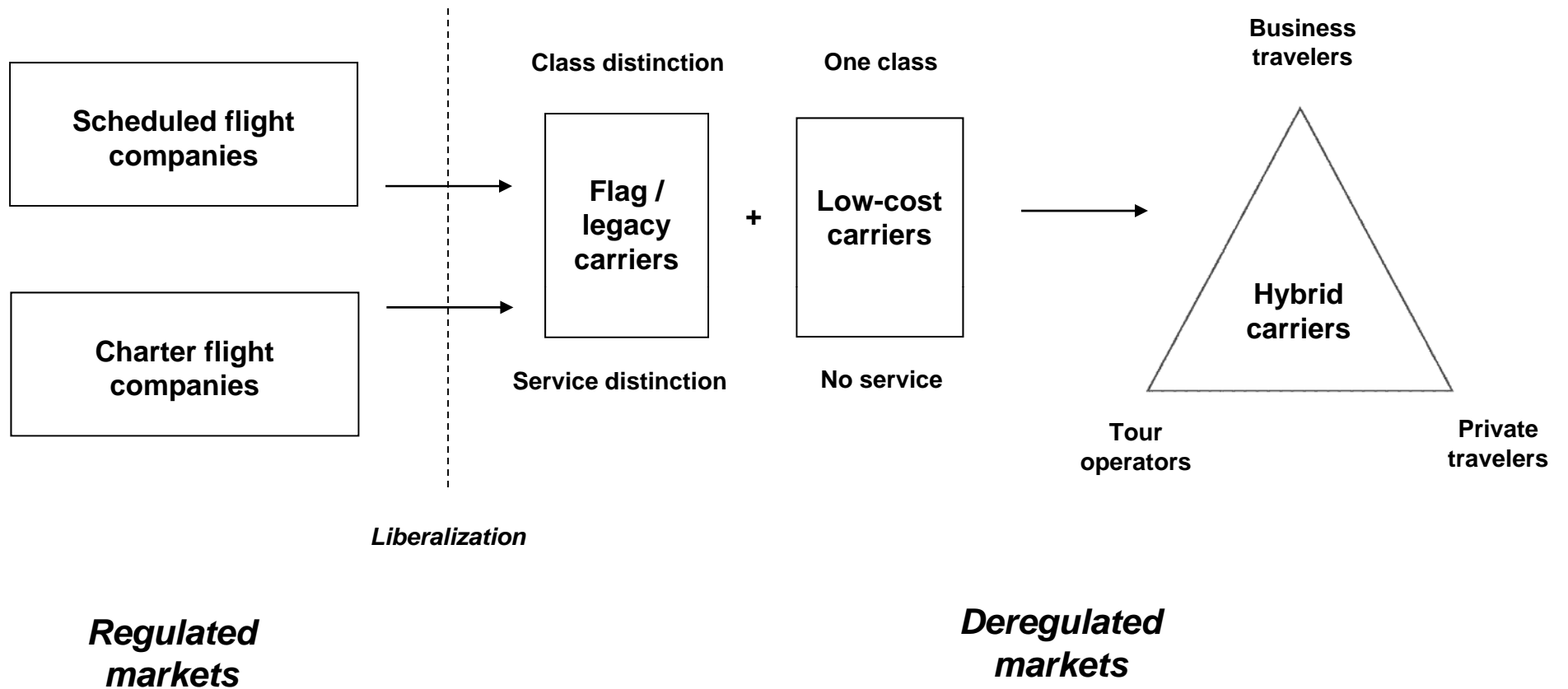
Competition in the air traffic market boosts up market consolidation

Overview of the consolidation process of the network carriers



1) 50% share in Sunexpress; 2) Take over process finalized, pending Cartell decision; 3) Minor stake
4) Also shares in Transavia and Martinair; 5) 100% share via City Jet

The liberalized market is changing the business models



**Thank you
very much for
your attention!**

