

Berlin

LUFTHANSA GROUP IS THE MARKET LEADER AT BER

In October 2022, 2.1 million people took off from or landed at BER. This is only two-thirds of the October 2019 figure, but still represents the busiest month for travel at the new airport. The Lufthansa Group has a considerable stake in this. Group airlines offer the most flights, and the trend is rising. The debate about more intercontinental flights at BER is a recurring one – but not always one with factually correct information.

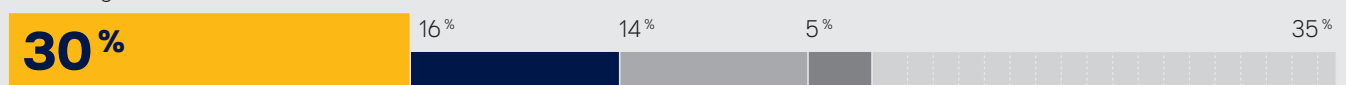
Lufthansa Group is continuously expanding market leadership

Share of flights per airline

Summer flight schedule 2022*



Winter flight schedule 2022/2023



Summer flight schedule 2023



* Not equal to 100% due to rounding

Lufthansa Group easyjet Ryanair British Airways Others

Source: IATA DDS, as of November 2022

Travellers from the capital region can reach around 260 destinations with Lufthansa Group airlines – with a single change in Frankfurt, Munich, Vienna or Zurich. Currently, an average of 55 flights from Austrian Airlines, Brussels Airlines, Eurowings, Lufthansa and SWISS take off daily from Berlin Brandenburg Airport, making the Lufthansa Group the market leader at BER. In the current winter flight schedule, our five airlines offer just under a third of all flights to and from Berlin. As of today's planning, in the summer of 2023, the offer of the Lufthansa Group, around 36% of all flights, will be more than double the size of the second largest carrier at the location.

Low long-haul capacity due to historical reasons

However, the supply of direct intercontinental flights is stagnating. From the perspective of the capital region, this is unsatisfactory at first glance. However, the background is understandable. As a result of the division of Germany, Berlin has not been able to develop into an international hub. For historical reasons, these tasks fell to Frankfurt and Munich. At the same time, in Germany's federal structure, no region



"Lufthansa and the German capital are linked by a long tradition," stated Berlin's Governing Mayor Franziska Giffey on the occasion of the christening of the first Lufthansa Dreamliner called Berlin. "Today, the Lufthansa Group links Berlin with the world."

alone has the potential to become an airport hub. This is what set the German capital, Frankfurt and Munich apart from London, Madrid and Paris. In addition, the proportion of business travellers who use certain routes continuously is significantly lower in Berlin than in other EU capitals. As a result, the potential for fully utilized and thus profitable long-haul flights is low. As a political and cultural centre and as an outstanding attraction for tourists, Berlin is particularly attractive for private travellers.

Airlines from all over the world can fly to BER

Six airlines currently fly from Berlin to destinations in the USA and Asia. For the most part, they connect the capital with their own hubs. Lufthansa's partner United, for example, flies to its home airport Newark.

The fact that more international connections are not being established at BER is not due to a lack of landing rights, despite continual claims: all of the nearly 150 airlines that fly to Germany can fly to the capital. The existing traffic rights apply nationwide; no airport is favoured or disadvantaged.

Air transport agreements must ensure fair competition

If there are differences in traffic law, this is due to asymmetrical competitive conditions. According to the traffic agreement, UAE airlines are allowed to fly to four airports of their choice in Germany. Emirates has opted for Frankfurt,

Munich, Düsseldorf and Hamburg – and so far does not want to give up any of these airports in favour of BER. Instead, the airline, which expanded its Dubai-Moscow route during the Russian war of aggression in Ukraine, is demanding additional landing rights. The German government has rejected this for good reasons, because as long as there is no level playing field for sustainability, consumer, competition and social standards, additional traffic rights will lead to the undermining of European rules.

Europe must secure its connectivity and avoid being dependent on third countries. It is thus imperative that air transport agreements take into account the upholding of fair competition and ensure comparable market conditions. It is fundamentally misleading in this debate to equate additional traffic rights for state-subsidised Gulf airlines with a rise in intercontinental connections – after all, the point is to replace a European hub for transfers with a transfer facility in the Gulf. This does contribute towards increasing connectivity.

The example of the EU agreement with Qatar has shown how not to do it. It gives Qatar Airways – a state-subsidised airline with a very small home market – unrestricted access to the European market. Among them Berlin. But instead of effective mechanisms to enforce inadequate workers' rights and environmental requirements, the agreement to date contains only ambiguous and non-binding provisions.

Summer 2023: Eurowings doubles service at BER

While other airlines are reducing their aircraft fleets in Berlin, Eurowings is focusing on growth. Already in the current winter flight schedule, a fourth aircraft will reinforce the subsidiary of the Lufthansa Group, followed by two more aircraft in March 2023. Eurowings CEO Jens Bischof says: "Berlin is and remains an absolute tourist magnet and culturally and historically one of Europe's most exciting metropolises. So it's only logical for us, as a German airline, to expand our presence and bring more Eurowings to the capital."

Eurowings

Lufthansa Group carries passengers from Berlin all over the world

Details for the winter flight schedule 2022/2023

