

Financial Year 2014: First Quarter results

FIRST QUARTER RESULTS ON TRACK

- ▶ Revenues of 5.55 billion euros, stable on a like-for-like basis, impacted by Easter calendar effect
- ▶ Operating result of -445 million euros, an improvement of 87 million euros
- ▶ EBITDA¹ of -50 million euros, an improvement of 66 million euros
- ▶ Reported unit cost¹ down 4.3%, and 1.7% like-for-like

FULL YEAR 2014 OUTLOOK: OBJECTIVES CONFIRMED

- ▶ Positive effect of Transform 2015
- ▶ Operating environment remains tough
- ▶ Measures underway to address headwinds from Caracas route and the slower than expected recovery in cargo demand

The Board of Directors of Air France-KLM, chaired by Alexandre de Juniac, met on 29th April 2014 to approve the accounts for the First Quarter 2014.

	First quarter		
	2014	2013*	Change
Revenues (€m)	5,554	5,681	-2.2%
<i>Change on a constant currency and scope basis</i>	-	-	+0.0%
EBITDA ¹ (€m)	-50	-116	+66
<i>EBITDA margin (%)</i>	-1.0	-2.0	+1.0 pts
Operating result (€m)	-445	-532	+87
<i>Operating margin (%)</i>	-8.0	-9.4	+1.4 pts
Net result, group share (€m)	-608	-641	+33
Adjusted net result, group share ¹ (€m)	-485	-652	+167
Earnings per share (€)	-2.05	-2.17	+0.12
Diluted earnings per share (€)	-2.05	-2.17	+0.12
Adjusted earnings per share ¹ (€)	-1.64	-2.20	+0.56
Operating free cash flow ¹ (€m)	-80	+40	-120
Net debt ¹ at end of period (€m)	5,538	5,348 ²	+190

* Restated for IFRIC 21, CityJet reclassified as discontinued operation

First Quarter 2014 revenues stood at 5,554 million euros versus 5,681 million euros in 2013, down 2.2%, but stable on a constant currency and scope basis (like-for-like). Currencies had a negative 108 million euro impact on revenues.

¹ See definition in appendix

² At 31 December 2013

Free translation into English for convenience only - French version prevails

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Operating costs were reduced by 3.4% and by 2.0% on a constant currency basis. Ex-fuel, they decreased by 2.3%, and by 1.3% on a constant currency basis. Unit cost per EASK¹ (Equivalent Available Seat Kilometer) was reduced by 4.3%, and by 1.7% on a constant currency, fuel price and pension expense basis, against capacity measured in EASK up by 1.2%. The fuel bill amounted to 1,553 million euros, down 6.3%, and down 3.5% on a constant currency basis. Total employee costs including temporary staff were down 3.8% to 1,846 million euros, and by 3.6% on a constant currency basis. At constant pension expense and scope, they declined by 60 million euros, well on track towards the 120 million euro reduction targeted for the full year.

EBITDA amounted to -50 million euros, an improvement of 66 million euros. The EBITDA margin stood at -1.0%, a 1.0 point improvement on 2013. The operating result stood at -445 million euros versus -532 million euros in 2013, an 87 million euro improvement. Currencies had a 15 million euro net negative impact on First Quarter operating result.

Net result, group share stood at -608 million euros against -641 million euros a year ago. It was impacted by 117 million euros of foreign exchange losses, in particular related to an adjustment in the value of the cash held by the Group in Venezuela, to take into account the currency conversion risk. On an adjusted basis³, the net result, group share stood at -485 million euros against -652 million in First Quarter 2013, a 167 million euro improvement.

Earnings and diluted earnings per share both stood at -2.05 euros (-2.17 euros in 2013), and at -1.64 euros on an adjusted basis (-2.20 euros in 2013).

Passenger business

Passenger	Q1 2014	Q1 2013	Change	Change Like-for-like*
Capacity (ASK m)	64,047	63,252	+1.3%	-
Traffic (RPK m)	53,027	51,965	+2.1%	-
Load factor	82.8%	82.2%	+0.6 pts	-
Total passenger revenues (€m)	4,365	4,450	-1.9%	+0.0%
Scheduled passenger revenues (€m)	4,168	4,223	-1.4%	+0.5%
Unit revenues per ASK (€ cts)	6.51	6.69	-2.7%	-0.7%
Unit revenues per RPK (€ cts)	7.86	8.14	-3.4%	-1.5%
Unit cost per ASK (€ cts)	7.10	7.39	-4.0%	-2.4%
Operating result (€m)	-378	-447	+69	+80

* Like-for-like: on a constant currency basis and restated for change in revenue allocation (7 million euros transferred from "other passenger" to "scheduled passenger" revenues in Q1 2013)

First Quarter 2014 passenger revenues amounted to 4,365 million euros, down 1.9%, but stable on a constant currency basis. The passenger business was particularly impacted by the calendar effect of Easter, which fell in March last year. The operating result of the passenger business stood at -378 million euros, versus -447 million euros in Q1 2013, an improvement of 80 million euros on a constant currency basis.

Total passenger traffic rose by 2.1% while capacity rose by 1.3% leading to a 0.6 point improvement in load factor to 82.8%. Unit revenue per Available Seat Kilometer (RASK) fell by 2.5% and by 0.7% like-for-like. Unit costs (CASK) were reduced by 3.9% and by 2.4% like-for-like.

Long-haul traffic rose 2.2% for a 2.1% rise in capacity, leading to a stable load factor at 85.2%. Long-haul RASK was down 0.4% like-for-like.

As planned in the framework of Transform 2015, medium-haul capacity was reduced by 2.2%. Traffic rose by 1.6%, leading to a 2.7 point improvement in load factor to 73.3%. Medium-haul RASK improved by 0.6% like-for-like.

³ See definition in appendix

Cargo business

Cargo	Q1 2014	Q1 2013	Change	Change Ex currency
Capacity (ATK m)	3,798	3,834	-0.9%	-
Traffic (RTK m)	2,461	2,416	+1.9%	-
Load factor	64.8%	63.0%	+1.8 pts	-
Total Cargo revenues (€m)	676	700	-3.4%	-1.3%
Scheduled cargo revenues (€m)	630	656	-4.0%	-1.9%
Unit revenues per ATK (€ cts)	16.59	17.11	-3.0%	-1.0%
Unit revenues per RTK (€ cts)	25.60	27.15	-5.7%	-3.7%
Unit cost per ATK (€ cts)	17.46	18.44	-5.4%	-3.7%
Operating result (€m)	-34	-50	+16	+18

First Quarter 2014 cargo revenues amounted to 676 million euros, down 3.4% and by 1.3% on a constant currency basis. Traffic experienced a slight upturn, rising by 1.9% for a 0.9% decline in capacity, leading to a 1.8 point increase in load factor to 64.8%. However, the yield remained weak, leading to a 1.0% decline in unit revenue per Available Ton Kilometer (RATK) on a constant currency basis (-3.0% on a reported basis).

Thanks to a reduction in unit cost (down 3.7% on a constant currency basis, and 5.4% on a reported basis), the operating result improved, from -50 million euros in Q1 2013 to -34 million euros. Nevertheless the recovery of cargo demand is taking longer than expected, and further scenarios are now under consideration to restructure the full freighter business in order to accelerate the turnaround.

Maintenance

Maintenance	Q1 2014	Q1 2013	Change	Change Ex currency
Total revenues (€m)	804	788	+2.0%	-
Third party revenues (€m)	290	302	-4.0%	-1.9%
Operating result (€m)	22	20	+2	+3
Operating margin (%)	+2.7%	+2.5%	+0.2 pts	-

First Quarter 2014 third party maintenance revenues amounted to 290 million euros, down 4.0% and by 1.9% on a constant currency basis, reflecting quarterly variations in the scheduling of engine shop visits. The operating result stood at 22 million euros, up 2 million euros year-on-year. The operating margin stood at 2.7% versus 2.5% a year earlier.

In the quarter, the group recorded a 15% increase in its order book to 5.2 billion euros, including a major contract with Air China to cover the maintenance of GE90 engines.

Other business: Transavia

Transavia	Q1 2014	Q1 2013	Change	Change Ex currency
Capacity (ASK m)	3,265	3,034	+7.6%	-
Traffic (RPK m)	2,817	2,600	+8.4%	-
Load factor	86.3%	85.7%	+0.6 pt	-
Total passenger revenues (€m)	139	134	+3.7%	+3.8%
Scheduled passenger revenues (€m)	128	124	+2.9%	+2.9%
Unit revenues per ASK (€ cts)	3.91	4.08	-4.3%	-4.3%
Unit revenues per RPK (€ cts)	4.53	4.77	-5.0%	-5.0%
Unit cost per ASK (€ cts)	5.69	5.76	-1.2%	-0.5%
Operating result (€m)	-58	-51	-7	-7

In First Quarter 2014, Transavia traffic rose 8.4% for capacity up 7.6%, leading to a 0.6 point increase in load factor to 86.3%. Unit revenue was down 4.3%, also affected by Easter timing. Transavia's total revenue stood at 139 million euros, up 3.7%. The operating result was -58 million euros, down 7 million euros year-on-year.

Other business: Catering

Catering	Q1 2014	Q1 2013	Change	Change At constant scope*
Total revenues (€m)	205	219	-6.4%	+2.5%
Third party revenues (€m)	73	84	-13.1%	+12.3%
Operating result (€m)	-4	-1	-3	-1

* At constant scope : with 2013 restated for deconsolidation of Air Chef

First Quarter 2014 third party catering revenues amounted to 73 million euros, down 13.1% reflecting the deconsolidation of Air Chef. They were up 12.3% at constant scope.

Financial situation

In €million	Q1 2014	Q1 2013*	Change
Cash flow before change in WCR and Voluntary Departure Plans	-167	-251	+84
Cash out related to Voluntary Departure Plans	-46	-19	-27
Change in Working Capital Requirement	+460	+483	-23
Operating cash flow	247	213	+34
Net investments before <i>sale & lease-back</i>	-327	-250	-77
<i>Sale & lease-back</i> transactions	0	+77	-77
Net investments after <i>sale & lease-back</i>	-327	-173	-154
Operating free cash flow	-80	40	-120

* Restated for IFRIC 21, CityJet reclassified as discontinued operation

The further improvement in EBITDA translated into an 84 million euro increase in cash flow before change in WCR and the cash out related to Voluntary Departure Plans.

In the First Quarter, net investments before *sale & lease-back* transactions stood at 327 million euros, in line with the Transform 2015 full year capex budget. Operating free cash flow amounted to -80 million euros, versus a positive 40 million euros a year earlier, partly due to the fact that Q1 2013 benefited from a cash inflow of 77 million euros from *sale and lease-back* transactions.

Net debt amounted to 5.54 billion euros at 31st March 2014, versus 5.35 billion euros at 31st December 2013. The slight increase in net debt reflects foreign exchange losses partly relating to Venezuela. At 2.9x, the net debt / EBITDA ratio was stable compared to 31st December 2013.

Outlook

Delivery on the Transform 2015 plan is fully on track. However, the general operating environment remains tough. Under these conditions, the group remains committed to its objective of an EBITDA in the region of 2.5 billion euros in Full Year 2014, subject to the successful implementation of the measures aimed at compensating for the slower than expected recovery in cargo demand and the network adjustments linked to the situation on the Caracas route, and no reversal in other operating trends. The group will continue to reduce its net debt in line with its objective of 4.5 billion euros in 2015.

The First Quarter 2014 accounts are not audited by the Statutory Auditors.

INCOME STATEMENT

<i>In euros millions</i>	First Quarter (January to March)		
	2014	2013*	variation
SALES	5,554	5,681	(2,2%)
Other revenues	8	-	nm
EXTERNAL EXPENSES	(3,739)	(3,847)	(2.8)%
Aircraft fuel	(1,553)	(1,657)	(6.3)%
Chartering costs	(98)	(115)	(14.8)%
Aircraft operating lease costs	(217)	(231)	(6.1)%
Landing fees and en route charges	(416)	(420)	(1.0)%
Catering	(137)	(136)	0.7%
Handling charges and other operating costs	(331)	(343)	(3.5)%
Purchasing of maintenance services and parts	(320)	(304)	(5.3)%
Commercial and distribution costs	(224)	(222)	0.9%
Other external expenses	(443)	(419)	5.7%
Salaries and related costs	(1,802)	(1,880)	(4.1)%
Taxes other than income taxes	(54)	(54)	0.0%
Amortization	(378)	(384)	(1.6)%
Depreciation and provisions	(17)	(32)	(46.9)%
Other income and expenses	(17)	(16)	6.3%
INCOME FROM CURRENT OPERATIONS	(445)	(532)	(16.4)%
Sales of aircraft equipment	1	(4)	nm
Sales of subsidiaries	0	(6)	(100.0)%
Other non-current income and expenses	(1)	(17)	(94.1)%
INCOME FROM OPERATING ACTIVITIES	(445)	(559)	(20.4)%
Income from cash and cash equivalents	18	20	(10.0)%
Cost of financial debt	(114)	(117)	(2.6)%
<i>Net cost of financial debt</i>	(96)	(97)	(1.0)%
Foreign exchange gains (losses), net	(117)	4	nm
Change in fair value of financial assets and liabilities	(6)	43	nm
Other financial income and expenses	(3)	4	nm
INCOME BEFORE TAX	(667)	(605)	10.2%
Income taxes	69	28	146.4%
NET INCOME OF CONSOLIDATED COMPANIES	(598)	(577)	3.6%
Share of profits (losses) of associates	(4)	(54)	(92.6)%
INCOME FROM CONTINUING OPERATIONS	(602)	(631)	(4.6)%
Net income from discontinued operations	(6)	(9)	(33.3)%
NET INCOME FOR THE PERIOD	(608)	(640)	(5.0)%
Minority interest	-	(1)	(100.0)%
NET INCOME FOR THE PERIOD - GROUP	(608)	(641)	(5.1)%

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CONSOLIDATED BALANCE SHEET

Assets <i>In € millions</i>	March 31, 2014	December 31, 2013*
Goodwill	236	237
Intangible assets	914	896
Flight equipment	9,338	9,391
Other property, plant and equipment	1,779	1,819
Investments in equity associates	175	177
Pension assets	1,912	2,454
Other financial assets	1,926	1,963
Deferred tax assets	515	434
Other non-current assets	93	113
Total non current assets	16,888	17,484
Assets held for sale	71	91
Other short term financial assets	858	1,031
Inventories	551	511
Trade receivables	2,172	1,775
Current income tax receivables	33	23
Other current assets	862	822
Cash and cash equivalents	2,847	3,684
Total current assets	7,394	7,937
Total assets	24,282	25,421

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Liabilities and equity <i>In € millions</i>	March 31, 2014	December 31, 2013*
Issued capital	300	300
Additional paid-in capital	2,971	2,971
Treasury shares	(89)	(85)
Reserves and retained earnings	(2,135)	(941)
Equity attributable to equity holders of Air France-KLM	1,047	2,245
Non-controlling interests	44	48
Total Equity	1,091	2,293
Provisions and retirement benefits	3,220	3,102
Long-term debt	8,398	8,596
Deferred tax liabilities	17	178
Other non-current liabilities	375	397
Total non-current liabilities	12,010	12,273
Liabilities relating to assets held for sale	39	58
Provisions	640	670
Current portion of long-term debt	1,447	2,137
Trade payables	2,487	2,369
Deferred revenue on ticket sales	3,208	2,371
Frequent flyer programs	745	755
Current income tax liabilities	2	2
Other current liabilities	2,434	2,327
Bank overdrafts	179	166
Total current liabilities	11,181	10,855
Total liabilities	23,191	23,128
Total equity and liabilities	24,282	25,421

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CONSOLIDATED STATEMENT OF CASH FLOWS

<i>In € millions</i>		
Period from January 1 to March 31,	2014	2013*
Net income from continuing operations	(602)	(631)
Net income from discontinued operations	(6)	(9)
Amortization, depreciation and operating provisions	395	420
Financial provisions	4	(4)
Results on disposals of tangible and intangible assets	(4)	8
Results on disposals of subsidiaries and associates	-	6
Derivatives – non monetary result	6	(47)
Unrealized foreign exchange gains and losses, net	111	(4)
Share of (profits) losses of associates	4	54
Deferred taxes	(78)	(38)
Other non-monetary items	(43)	(25)
Subtotal	(213)	(270)
Of which discontinued operations	(6)	(5)
(Increase) / decrease in inventories	(39)	(11)
(Increase) / decrease in trade receivables	(385)	(422)
Increase / (decrease) in trade payables	144	64
Change in other receivables and payables	734	846
Change in working capital from discontinued operations	6	6
Net cash flow from operating activities	247	213
Acquisition of subsidiaries, of shares in non-controlled entities	(1)	(9)
Purchase of property plants, equipments and intangible assets	(337)	(281)
Loss of subsidiaries, of disposal of shares in non-controlled entities	-	9
Proceeds on disposal of property, plant and equipment and intangible assets	10	108
Dividends received	7	6
Decrease (increase) in net investments, more than 3 months	181	41
Net cash flow used in investing activities of discontinued operations	1	(1)
Net cash flow used in investing activities	(139)	(127)
Issuance of debt	308	882
Repayment on debt	(1,032)	(308)
Payment of debt resulting from finance lease liabilities	(150)	(143)
New loans	(5)	(33)
Repayment on loans	13	25
Net cash flow used in financing activities of discontinued operations	(1)	-
Net cash flow from financing activities	(867)	423
Effect of exchange rate on cash and cash equivalents and bank overdrafts	(92)	(3)
Effect of exchange rate on cash and cash equivalent and bank overdrafts of discontinued operations	-	(1)
Change in cash and cash equivalents and bank overdrafts	(851)	505
Cash and cash equivalents and bank overdrafts at beginning of period	3,518	3,160
Cash and cash equivalents and bank overdrafts at end of period	2,667	3,666
Change in cash of discontinued operations	-	(1)

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KEY FINANCIAL INDICATORS

EBITDA

(In € millions)	Q1 2014	Q1 2013*
Income/(loss) from current operations	(445)	(532)
Amortization	378	384
Depreciation and provisions	17	32
EBITDA	(50)	(116)

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Adjusted operating result and adjusted operating margin

	Q1 2014	Q1 2013*
Income/(loss) from current operations (in €m)	(445)	(532)
Portion of operating leases corresponding to financial charges (34%) (in €m)	74	79
Adjusted income/(loss) from current operations (in €m)	(371)	(453)
Revenues (in €m)	5,554	5,681
Adjusted operating margin	(6.7)%	(8.0)%

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Restated net income

	Q1 2014	Q1 2013*
Net income/(loss), Group share (in €m)	(608)	(641)
Net income/(loss) from discontinued operations (in €m)	6	9
Unrealized foreign exchange gains and losses, net (in €m)	111	(4)
Change in fair value of financial assets and liabilities (derivatives) (in €m)	6	(43)
Non current income and expenses (in €m)	0	27
Restated net income/(loss) (in €m)	(485)	(652)
Restated net income/(loss) per share (in €)	(1.64)	(2.20)

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Net debt

Balance sheet at (In € millions)	March 31, 2014	December 31, 2013*
Current and non-current financial debt	9,845	10,733
Deposits on aircraft under finance lease	(628)	(626)
Financial assets pledged (OCEANE swap)	(196)	(393)
Currency hedge on financial debt	7	8
Accrued interest	(93)	(144)
Gross financial debt (A)	8,935	9,578
Cash and cash equivalents	2,847	3,684
Marketable securities	135	126
Cash pledges	439	432
Deposits (bonds)	155	154
Bank overdrafts	(179)	(166)
Net cash (B)	3,397	4,230
Net debt (A) – (B)	5,538	5,348

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Operating free cash flow

(In € millions)	Q1 2014	Q1 2013*
Net cash flow from operating activities	247	213
Investment in property, plant, equipment and intangible assets	(337)	(281)
Proceeds on disposal of property, plant, equipment and intangible assets	10	108
Operating free cash flow	(80)	40

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Net cost per EASK

	Q1 2014	Q1 2013*
Revenues (in €m)	5,554	5,681
Income/(loss) from current operations (in €m)	(445)	(532)
Total operating expense (in €m)	5,999	6,213
Passenger business – other passenger revenues (in €m)	197	220**
Cargo business – other air freight revenues (in €m)	46	44
Third-party revenues in the maintenance business (in €m)	290	302
Other businesses – revenues other than Transavia transportation (in €m)	95	105
Net cost (in €m)	5,371	5,542
Capacity produced, reported in EASK	77,164	76,238
Net cost per EASK (in €cents per ESKO)	6.96	7.27
Gross change	-4.3%	
Currency effect on net costs (in €m)		-79
Change at constant currency	-2.9%	
Fuel price effect (in €m)		-62
Change on a constant currency and fuel price basis	-1.8%	
Defined pension benefit expense included in salaries and related costs (in €m)	98	104
Net cost per EASK on a constant currency, fuel price and defined benefit pension expense basis (in €cents per EASK)	6.96	7.08
Change on a constant currency, fuel price and defined benefit pension expense basis	-1.7%	

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** Restated for change in revenue allocation

INDIVIDUAL AIRLINE RESULTS

Air France

	Q1 2014	Q1 2013*
Revenue (€bn)	3.56	3.64
EBITDA (€m)	-12	-77
Operating result (€m)	-279	-370

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KLM

	Q1 2014	Q1 2013*
Revenue (€bn)	2.08	2.12
EBITDA (€m)	-44	-38
Operating result (€m)	-174	-163

* Restated for IFRIC 21

NB: Sum of individual airline results does not add up to Air France-KLM total due to intercompany eliminations at Group level.

GROUP FLEET AS OF 31ST MARCH 2014

Air France fleet

Aircraft	AF	HOP			Transavia	Owned	Finance lease	Operating lease	Total	In operation	Change / 12/31/13
		Airlinair*	Brit Air	Régional							
B747-400	7					3	1	3	7	7	
B777-300	37					11	9	17	37	37	
B777-200	25					15	2	8	25	25	
A380-800	9					1	4	4	9	9	
A330-200	15					3	2	10	15	15	
Long haul	106					37	24	45	106	106	
B747-400-ERF	4					2		2	4	2	
B747-400-BCF											
B777- cargo	2					2			2	2	
Freighter	6					4		2	6	4	
B737-800					11			11	11	11	
A321	25					6	6	13	25	25	
A320	47					9	3	35	47	44	
A319	42					15	10	17	42	41	
A318	18					11	7		18	18	
Medium haul	132				11	41	26	76	143	139	
ATR72-500		9				1	3	5	9	9	+1
ATR72-200											-1
ATR42-500		13				4	4	5	13	13	
Canadair Jet 1000			13			13			13	13	
Canadair Jet 700			15			12	3		15	13	
Canadair Jet 100			12			12			12	7	
Embraer 190				10		4		6	10	10	
Embraer 170				16		8	2	6	16	16	
Embraer 145				19		14	5		19	18	
Embraer 135				6		4	2		6	2	
Regional		22	40	51		72	19	22	113	101	
TOTAL	244	22	40	51	11	154	69	145	368	350	

Cityjet : 19 aircraft AVRO RJ85 (17 in operation)

VLM : 12 aircraft FOKKER 50 (12 in operation)

(*) Integrated in the first quarter of 2013

KLM fleet

Aircraft	KLM	KLM Cityhopper	Transavia	Martinair	Owned	Finance lease	Operating lease	Total	In operation	Change / 12/31/13
B747-400	22				15	2	5	22	22	
B777-300	8					8		8	8	
B777-200	15					6	9	15	15	
A330-300	4						4	4	4	
A330-200	12					6	6	12	12	
MD11	5				4	1		5	4	
Long haul	66				19	23	24	66	65	
B747-400-ERF				4		3	1	4	3	
B747-400-BCF				3			3	3	1	
MD-11-CF				3	3			3	3	
MD-11-F				3		2	1	3	3	
Freighter				13	3	5	5	13	10	
B737 900	5					2	3	5	5	
B737-800	24		22		7	10	29	46	46	+1
B737-700	18		9		2	9	16	27	27	
Medium haul	47		31		9	21	48	78	78	+1
Embraer 190		27				13	14	27	27	+3
Fokker 70		26			26			26	22	-4
Regional		53			26	13	14	53	49	-1

KLM	113	53	31	13	57	62	91	210	202	
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TOTAL Air France-KLM Group					211	131	236	578	552	
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TOTAL Air France-KLM Group (including Cityjet and VLM airlines)					232	131	246	609	581	-2
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