German Aerospace Center

News Archive Transportation 2009

New 'Global Aviation Monitor' from DLR: globally speaking, air traffic remains on a downward trend

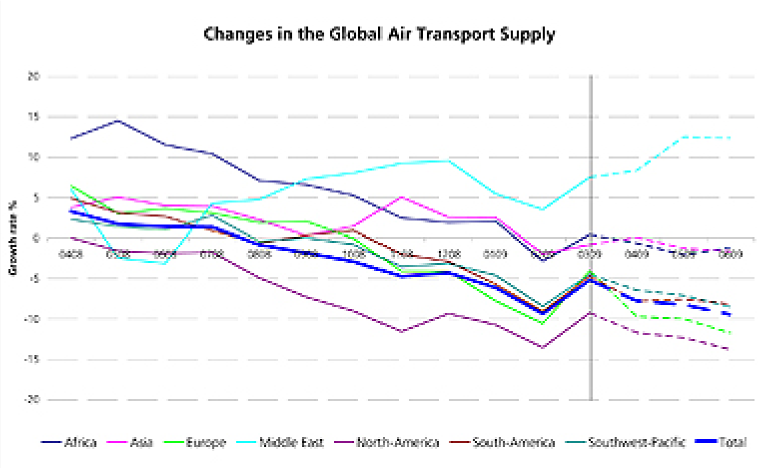
17 April 2009

Low Cost Carriers

Global air traffic is experiencing a sharp downturn, which will be sustained until the end of June 2009. This downturn will primarily affect North America and Europe. In contrast, air traffic in the Middle East continues to thrive and prosper. In Germany, for the period from April to June 2009, a downturn substantially in excess of five percent is being predicted. These are the core messages from the Global Aviation Monitor (GAM), produced for the first time by the German Aerospace Center (Deutsches Zentrum für Luft- und Raumfahrt; DLR).

The quarterly report by the DLR unit 'Flughafenwesen und Luftverkehr' (literally 'Airports and Air Traffic') describes the prevailing situation in the air traffic sector across individual regions of the globe and provides a look at likely trends in the next three-month period. This involves making statements about the global availability of flights and comments relating to the European and German market, as well as individual airports and airlines.

The DLR scientific researchers look at a global total of more than 3500 airports and somewhere in the region of 850 airlines. Since the fifties, air traffic volumes have grown steadily, interrupted only by short-term blips such as those caused by the oil crises in the seventies or the terrorist attacks of 11 September 2001. Particularly over the last few years, there has been a strong upturn in the air traffic sector. Following the 30 million flights offered worldwide on scheduled airlines and charter companies in 2008, the entire market is currently trending sharply downwards. In March 2009, some 2.4 million flights were offered, roughly five percent less than in the same month of the previous year.



Severe downturn in worldwide air traffic

In overall terms, while air traffic is experiencing negative rates of growth, some differences do emerge when you look at individual regions. This crisis is affecting North America particularly badly, and the volume of air traffic in that market is more than ten percent below the level of the previous year. To a lesser extent, these same signs are evident in Europe and in Germany. In other regions, with the Middle East being one example, the situation is much less dramatic. Here, there is even some genuine growth, although not on the scale originally anticipated.

This trend is also reflected when you look at the airports. For example, and especially when you look at North American airports such as Los Angeles, negative growth is running at a high level, well into double figures. In Europe, the airports worst affected are Milan-Malpensa and, in Germany, Dortmund. In contrast, positive growth is being enjoyed by airports across Asia, with Beijing being one good example, as well as in some areas of Europe, for example Istanbul. In Germany, signs of positive growth can be seen, particularly for airports handling low cost carriers.

Parallel to this, a similar situation is affecting the airlines. For example, airlines such as Delta, which operates primarily within North America, are experiencing declines in excess of 10% compared to the previous year, while others such as Air China are finding it possible to increase the space they offer on flights by about 13%. In Europe, British Airways is being particularly badly affected by the crisis, while on the other hand, Turkish Airlines and a few low cost carriers are finding it possible to increase available space. This is particularly noticeable in Germany. For example, Ryanair has been able to extend seat availability for Germany by almost 20 percent for March 2009, compared to the same period last year. Even if you bear in mind that the availability of seats evaluated here was based only on what is known in the trade as planning data, there is nonetheless a close correlation with actual air traffic volumes.

For the period April to June 2009, it therefore follows that, with a small number of exceptions, virtually all air traffic markets worldwide are facing the prospect of a sustained downwards trend. In overall terms, the global availability of flights will fall substantially below 2.5 million flights per month. This downward trend will also be sustained in Germany, and forecasts suggest that the downturn during the aforementioned period will be substantially higher than five percent.

Related Contacts

Hans-Leo Richter
German Aerospace Center
Corporate Communications, Editor, Aeronautics Research
Tel: +49 2203 601-2425
Fax: +49 2203 601-3249
E-Mail: Hans-Leo.Richter@dlr.de

Dr.phil. Peter Berster
Air Transport Research
Tel: +49 2203 601-4554
Fax: +49 2203 601-2377
E-Mail: Peter.Berster@dlr.de
