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New Global Aviation Monitors: DLR expects regeneration of German and international air traffic

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Last year's deep slump in global air traffic appears to have bottomed out; the negative growth rates have returned to positive since the beginning of this year. The June 2009 level has been attained and even exceeded. This is one of the central declarations of the new Global Aviation Monitors (GAM) that the German Aerospace Center (Deutsches Zentrum für Luft- und Raumfahrt; DLR) has just published.

This quarterly report from DLR Air Transport and Airport Research (Flughafenwesen und Luftverkehr) provides a contemporary description of the state of traffic in individual regions of the world and furnishes a projected forecast for the following three months. In so doing, the researchers are able to impart information on German, European and global flight traffic, as well as on individual airports and airline companies.

Elevated growth in Asia, upward trends in Europe

"The recent changes are principally due to the high growth in Asia and the Middle East, but buoyancy is also recognisable in Germany and Europe. Thus there is an expectation of seeing sustained growth here over the coming months. North America in contrast, the largest air traffic market, has not registered any positive developments to date," declares DLR researcher Peter Berster, who is leading the study.

The researchers are performing a global analysis of more than 3500 airports and approximately 850 airline companies. There has been consistent growth in recorded air traffic since the 1950s, interrupted only by some short-term dips such as the oil-crisis and the 11 September 2001 terror attacks. There has been a strong upswing in air traffic, particularly in the last few years. After some 30 million scheduled and charter flights were recorded in 2008 worldwide, the global financial and economic crisis of 2009 caused this figure to dip to 29 million flights. This downward curve levelled off at the beginning of 2010 and positive growth trends were again in evidence. This positive curve is persisting now, and is also anticipated for Germany where traffic has been level.

In June 2010, when the report was published, approximately 2.62 million flights were made, corresponding to a 5.7 percent increase in comparison with June of last year, where a decline of 4 percent had been recorded. Total traffic may reach or even exceeds last year's levels, but there are marked differences in individual regions.

North America, still in the grip of the crisis, finds its present traffic nearing last year's levels – with no fundamental improvement in sight. In other regions, such as the Middle East for example, the contrasting positive development is enduring with a growth rate of more than 10 percent, even though this figure was somewhat lower at the beginning of this year. Meanwhile Asian air traffic, which had been conjectured to be in the red at the beginning of 2009, managed to find stability again and is posting a double-digit growth rate since the beginning of 2010; likewise an over-proportional growth is projected here over the next three months.

Escalation of large airports



Positive developments are also reflected by the construction of ever larger airports. Those such as Los Angeles or Chicago in North America for example, that record stagnant or negative levels in winter, enjoy a growth today of more than five percent. Large airports in Europe such as Frankfurt, London, Madrid or Amsterdam are also displaying concrete progress.

Asian airports such as Beijing display the highest growth rates, as do individual ones in Europe, such as Copenhagen or Moscow. While in Germany, positive growth trends are being seen in smaller airports serving low-cost carriers. Most of the larger airports are also experiencing an increase in flights again, in comparison with a year ago.

A parallel may also be drawn here with development of airline companies. For instance, North American airline companies such as American Airlines, which recorded a fall of over 10 percent in comparison with the previous year, is experiencing slight recovery at present. Asian airlines, and especially Air China, have been able to post a 13 percent increase in traffic in comparison. In Europe, Air France is still reeling from the financial crisis, producing a perceptible knock-on effect of lower numbers through Charles de Gaulle airport in Paris. In contrast, Turkish Airlines and some low-cost carriers have been able to increase their traffic considerably. This is also noticeable in Germany, where Ryanair for example flew almost 17 percent more people in June this year compared with the same period last year. The researchers however realise that even though the traffic analysed is based on planning data, there remains a tight correlation with actual traffic.

Projections for the next quarter point to global traffic approximating the numbers before the economic crisis. At the same time, differences in individual regional markets are expected. While the USA is not expected to reach 2008 levels in the next quarter, Europe is expected to attain numbers similar to 2008. Total global traffic will probably hover between 2.6 to 2.7 million flights per month. However, this is seasonal and reflects the inflated summer traffic. Germany seems able to keep the positive development for the foreseeable future, and an increase of up to five percent is envisioned.

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