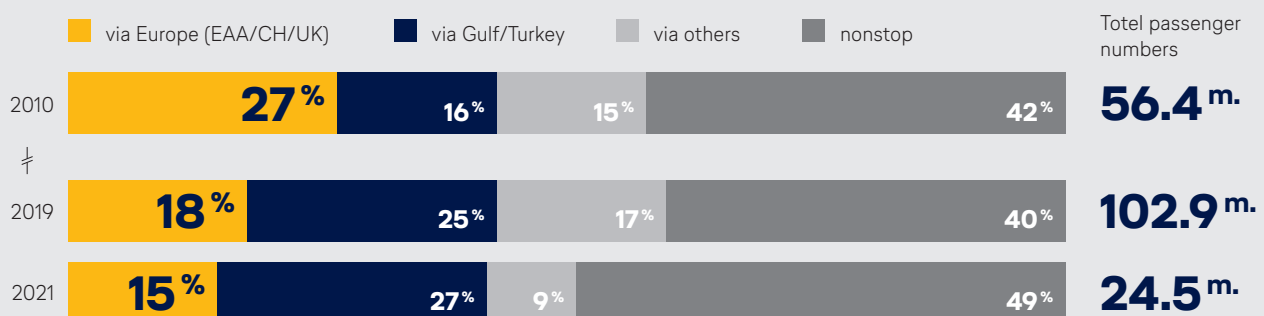


DLR guest article

EUROPE AND THE HUBS
AT GATES OF THE EU

Air transport has grown dramatically over the past decade: worldwide, passenger numbers almost doubled between 2010 and 2019. While the COVID-19 pandemic caused a dramatic downturn, the recovery phase is well under way. In the coming years, it will be interesting to observe just how flight connections and passenger flows will have changed compared to the 2010s.

Passenger flows Europe to Central Asia, Middle East Gulf region, India, Southeast Asia, Far East, Eastern and Southern Africa by transfer hub


Source: DLR

Before the pandemic, there were two clear trends in the position of Europe within the intercontinental aviation network. First, the number of direct intercontinental flights was steadily increasing. Second, most of the growth in connecting flights to Asia and Africa was seen to the southeast, at hubs outside the borders of the EU. As a result, European hubs were under considerable pressure even before COVID-19. Passenger flows to and from Europe show that EU hubs are losing market share: international aviation is growing more strongly outside the continent.

Analyses by DLR, German Aerospace Centre, have put these developments in sharp focus. The number of passengers on flight connections from Germany to Asia and Africa rose by 73 percent between 2010 and 2019. The increase is even more marked at the European (European Economic Area [EEA] plus the UK and Switzerland) level, with passenger figures up by 82 percent from 56.4 million to 102.9 million over the same period. Smaller growth was seen in the number of transfer passengers, up by 15 percent in Germany and by 19 percent in Europe. Nevertheless, the market share of European hubs as transfer points for traffic from Europe to Asia and Africa fell from 27 percent in 2010 to just 18 percent in 2019.

The rapidly expanding hubs in Dubai, Abu Dhabi, Doha and Istanbul have benefited substantially from this development.

Their market share of traffic flows from Europe to Asia and Africa rose from 16 percent in 2010 to 25 percent in 2019. Traffic from North America via Europe to Asia and Africa is more stable, with little change in market shares of the European hubs over the same period.

Despite the upheaval caused by the COVID-19 pandemic for global air transport, these abovementioned trends remain. It remains to be seen how the current recovery of aviation and future European climate measures will affect the development and competitiveness of German and European hubs. The aviation industry must undoubtedly play its part in reducing its impact on the climate. To this end, we at DLR are also researching an array of new technologies and concepts to achieve the climate-neutral flying of tomorrow. The shift of traffic flows from European to non-European hubs, however, shows a significant challenge for globally successful climate measures.


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