



DOUBLEMENT DU TRAFIC AERIEN EN 2030

Quelqu'un pourrait-il encore en douter ?

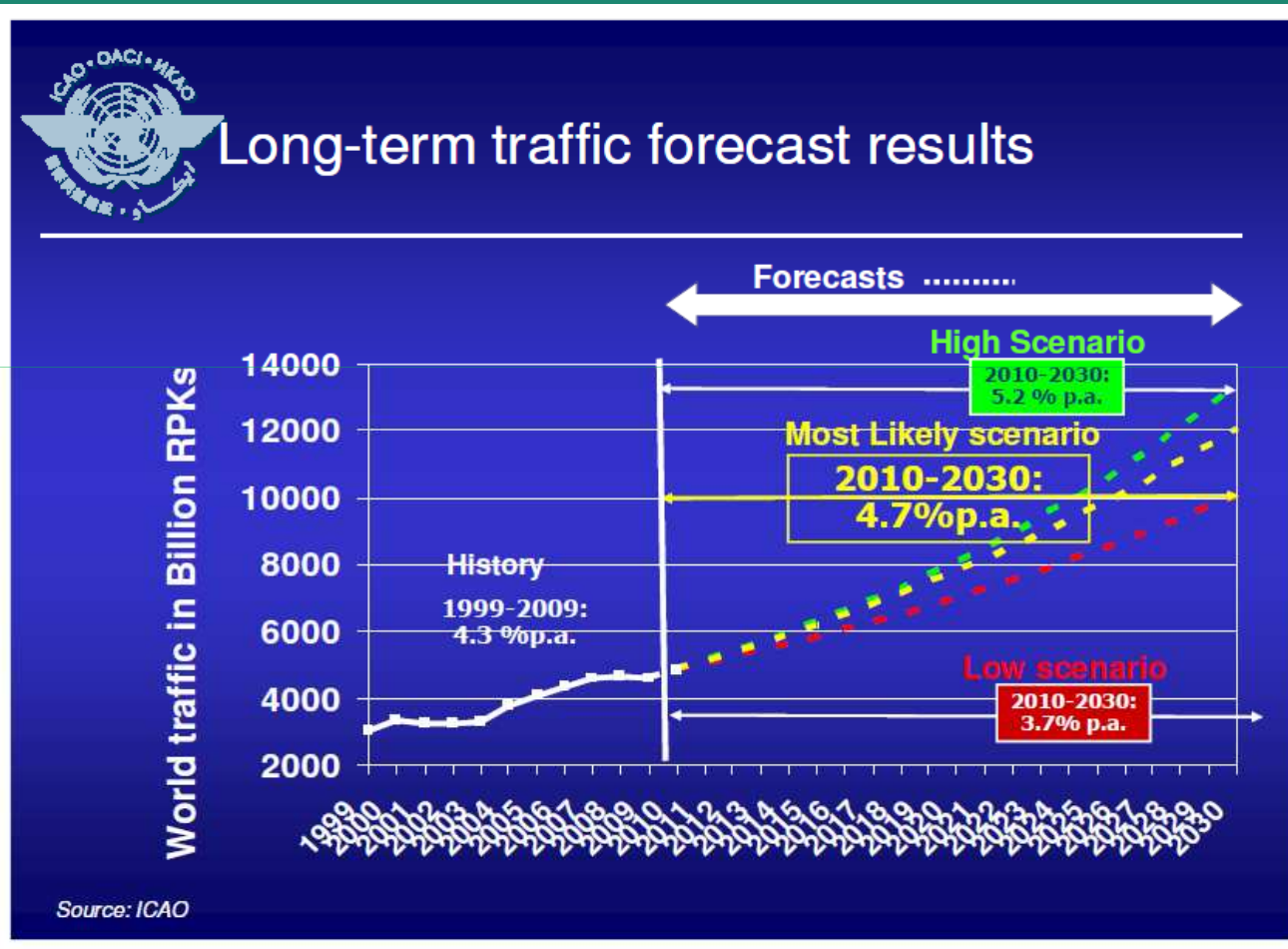
Analyses de :

**L'Organisation de l'Aviation Civile Internationale (ONU)
L'International Air Transport Association (ONU)
Airbus Industries & The Boeing Company
Eurocontrol & Organisation Mondiale du Tourisme (ONU)
U.S. Federal Aviation Administration**



OACI : revenu passager kilomètre

hypothèse la plus probable : x 2.5
hypothèse haute : x 2.76





AIRBUS : flotte avions passagers : x 2.1 revenu passager kilomètre : x 2.6

GMF 2011 Highlights

GMF 2011 key numbers and 20-year change

World fleet forecast	2010	2030	% change
RPK (trillion)	4.8	12.3	157%
Passenger aircraft fleet	15,000	31,420	109%
New passenger aircraft deliveries	-	26,920	-
Dedicated freighters	1,600	3,450	+116%
New freighter aircraft deliveries	-	930	-
Total new aircraft deliveries		27,850	

Market value of \$3.5 trillion



BOEING : avions en service : x 2.04 nombre de PAX : x 2.28

Airplanes in service 2010 and 2030			Demand by size 2011 to 2030		
Size	2010	2030	Size	New airplanes	Value (\$B)
Large	770	1,140	Large	820	270
Twin aisle	3,640	8,570	Twin aisle	7,330	1,770
Single aisle	12,100	27,750	Single aisle	23,370	1,950
Regional jets	2,900	2,070	Regional jets	1,980	70
Total	19,410	39,530	Total	33,500	4,060

**Current Market Outlook
2011-2030**

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Key indicators 2010 to 2030		Demand by region 2011 to 2030		
Growth measures		Region	New airplanes	Value (\$B)
World economy Gross domestic product (GDP)	3.3%	Asia Pacific	11,450	1,510
Airplane fleet	3.6%	Europe	7,550	880
Number of passengers	4.2%	North America	7,530	760
Airline traffic Revenue passenger- kilometers (RPK)	5.1%	Latin America	2,570	250
Cargo traffic Revenue tonne- kilometers (RTK)	5.6%	Middle East	2,520	450
		CIS*	1,080	110
		Africa	800	100
		Total	33,500	4,060

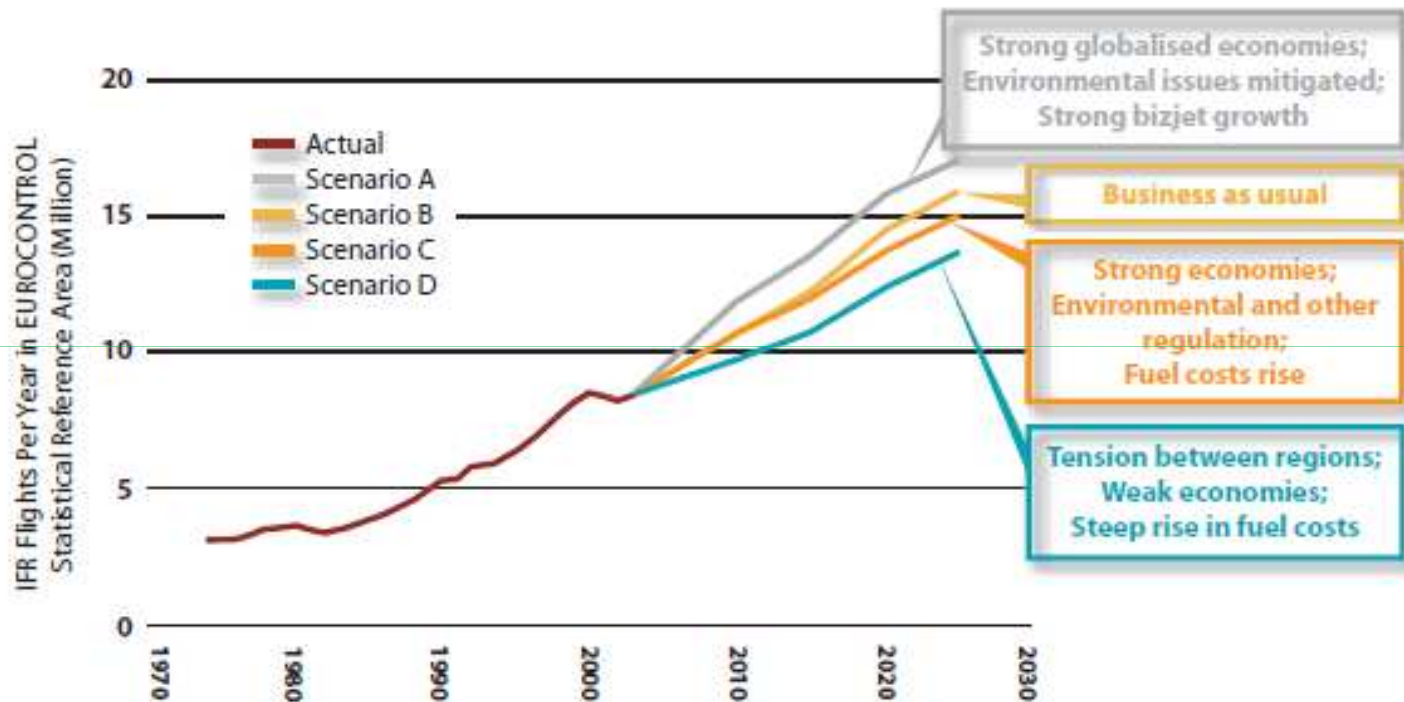
**Current Market Outlook
2011-2030**

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Source : <http://www.boeing.com/commercial/cmo/>



EUROCONTROL : nombre de vols IFR dans l'espace Eurocontrol : x 2



This graph shows the 2004 long-term forecast, highlighting the four scenarios, and the amount of traffic they would generate.

Source : http://www.eurocontrol.int/statfor/gallery/content/public/forecasts/forecast_leaflet.pdf



Eurocontrol : croissance globale des vols IFR : x 2.2

Figure 2. Summary of forecast for Europe.

	IFR Movements(000s)								Traffic Multiple 2030/2009
	2006	2007	2008	2009	2016	2020	2025	2030	
A: Global Growth	9,561	10,043	10,083	9,413	12,529	14,877	17,925	20,906	2.2
C: Regulated Growth	.	.	.	.	11,533	12,727	14,714	16,887	1.8
D: Fragmenting World	.	.	.	.	11,533	12,445	13,632	14,895	1.6
E: Resource Limits	.	.	.	.	11,533	12,950	11,389	13,142	1.4

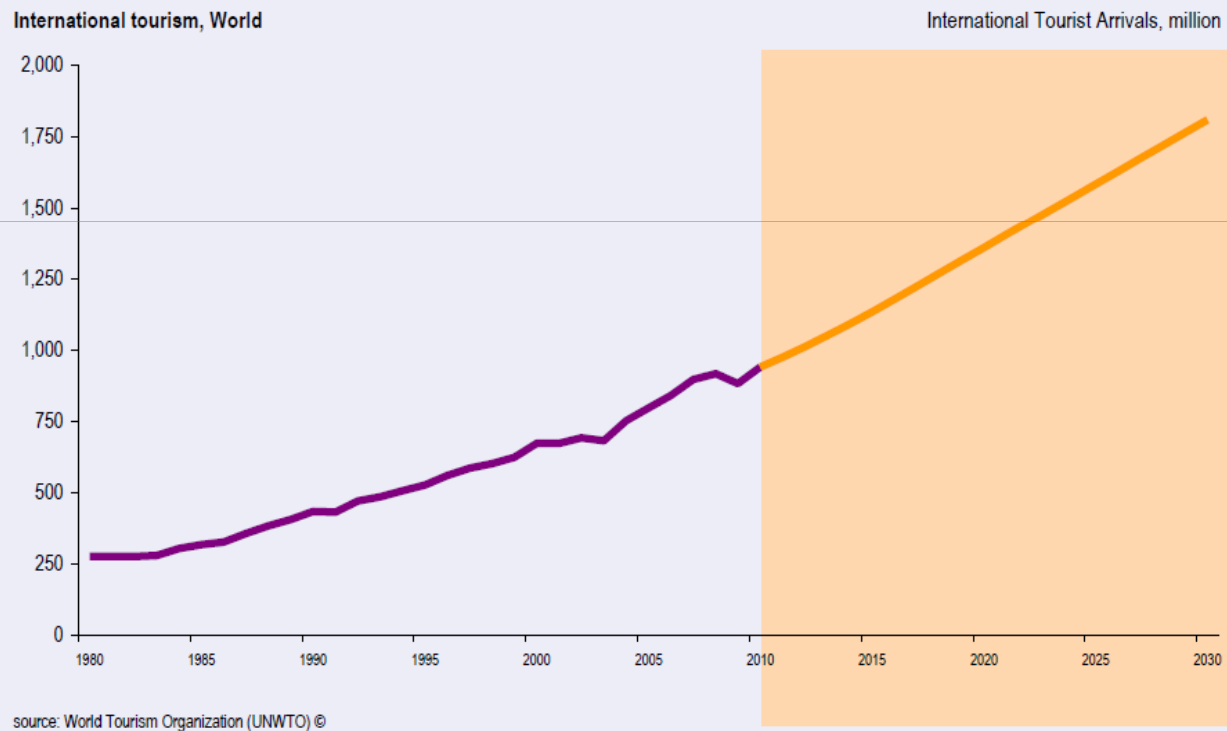
	Average Annual Growth								AAGR 2030/2009
	2006	2007	2008	2009	2016/2010	2020/2016	2025 / 2021	2030/2026	
A: Global Growth	3.7%	5.0%	0.4%	-6.6%	4.2%	4.4%	3.8%	3.1%	3.9%
C: Regulated Growth	.	.	.	.	2.9%	2.5%	2.9%	2.8%	2.8%
D: Fragmenting World	.	.	.	.	2.9%	1.9%	1.8%	1.8%	2.2%
E: Resource Limits	.	.	.	.	2.9%	2.9%	-2.5%	2.9%	1.6%

Source : <http://www.eurocontrol.int/statfor/gallery/content/public/forecasts/Doc415-LTF10-Report-Vol1.pdf>



OMT : arrivées de touristes : x 2

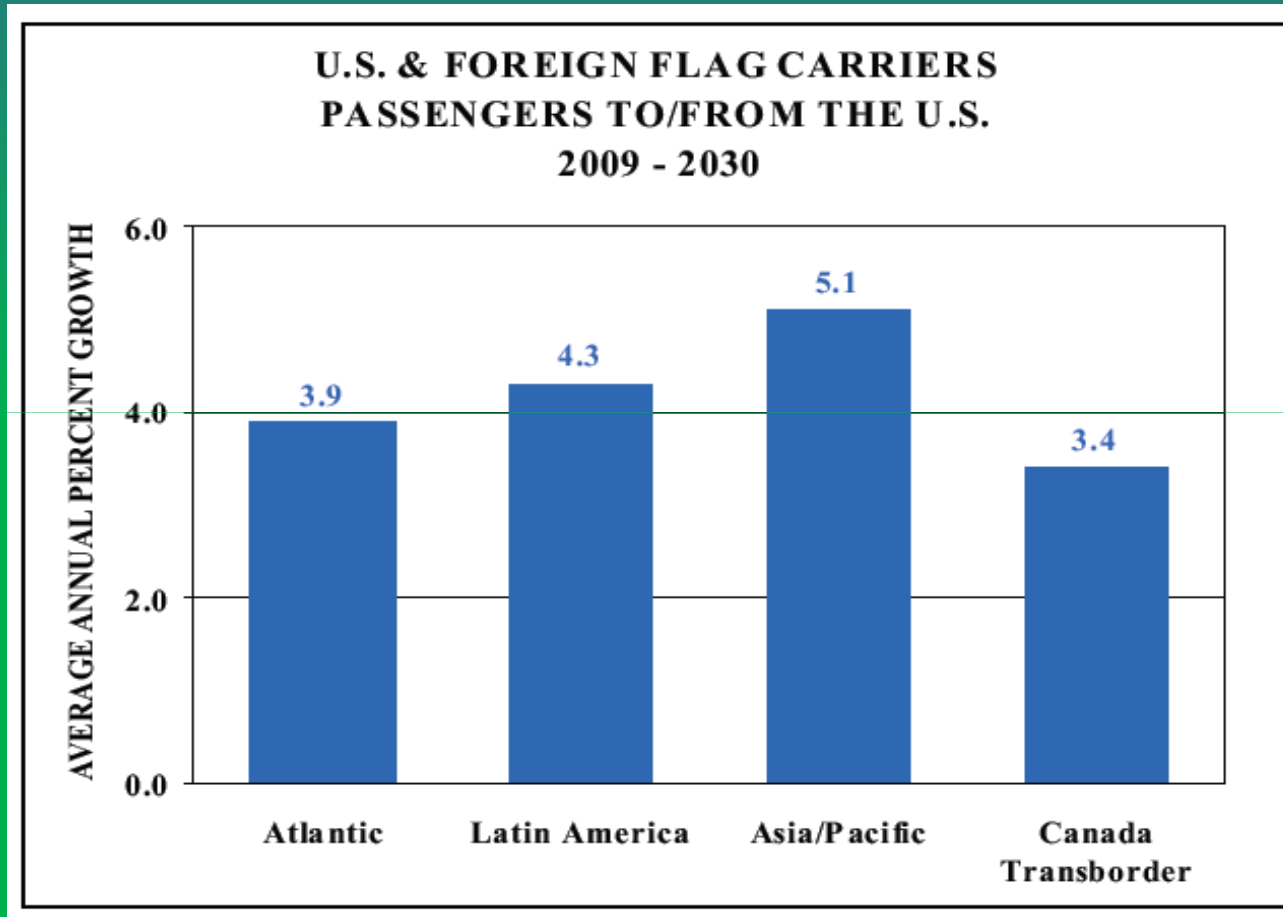
International tourist arrivals to reach 1.8 billion by 2030



Source : http://media.unwto.org/sites/all/files/pdf/unwto_2030_ga_2011_korea.pdf



FAA : trafic total PAX Asie/Pacifique – USA : x 2.7



Source : http://www.faa.gov/data_research/aviation/aerospace_forecasts/2010-2030/media/2010%20Forecast%20Doc.pdf



Et le meilleur pour la fin : vision 2050 !

Nous ne sommes pas sortis de l'auberge à Paris, à moins que ...

Airport capacity was identified as potentially the greatest impediment to the airline industry's ability to satisfy customer demand in 2050. The UK government's refusal to permit the construction of a third runway at London Heathrow indicates that **airport expansion is already a highly contentious subject** in Western liberal democracies. In contrast, China is in the process of building vast numbers of airports.

2.2.2 The airline industry in 2050

An industry that carried 2.4 billion passengers and shipped 40 million tonnes of goods in 2010 carried 16 billion passengers and shipped 400 million tonnes of goods this year. Air transport has grown at almost twice the rate of GDP expansion, meaning that more people are travelling than ever before and more frequently than ever before. Global advances in general technology have been mirrored in the airline industry, which has made the sector unrecognizable from what it was in 2035. Travelling by air is faster (when desired), safer and more seamless than ever before.

2010 : 2.4 MM PAX et 40 MT fret → 2050 16 MM = x 6.7 et 400 MT = x 10 !!!!

Source : <http://www.iata.org/about/Documents/vision-2050.pdf>