

# National Forecast Overview 2009-2025

Presented to: NAS Performance Workshop

By: Aviation Policy and Plans

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Federal Aviation  
Administration



# Review of 2008

- **Airline Traffic mixed, planes remain full**
  - RPMs up 0.7%; Passengers down 1%; LF at 79.5%
- **Pricing – Modest domestic; strong international**
  - Domestic real yield up 0.7%; International up 3.7%
- **General Aviation – Tale of 2 markets**
  - Shipments – Turbojets up 17.2%; Pistons down 17.6%
- **Air Traffic activity falls**
  - Tower Ops down 4.3%; En-Route Traffic down 3.1%



# Assumptions 2009-25

- **U.S. and World Economy**
  - Recession in 2009; Recovery in 2010-11
  - Long run trend growth: U.S – 2.6%; World – 3.2%
    - Fastest growth in Asia and Latin America
- **Oil Prices rise steadily after 2009**
- **Commercial Industry**
  - No further consolidation
- **Unconstrained demand**



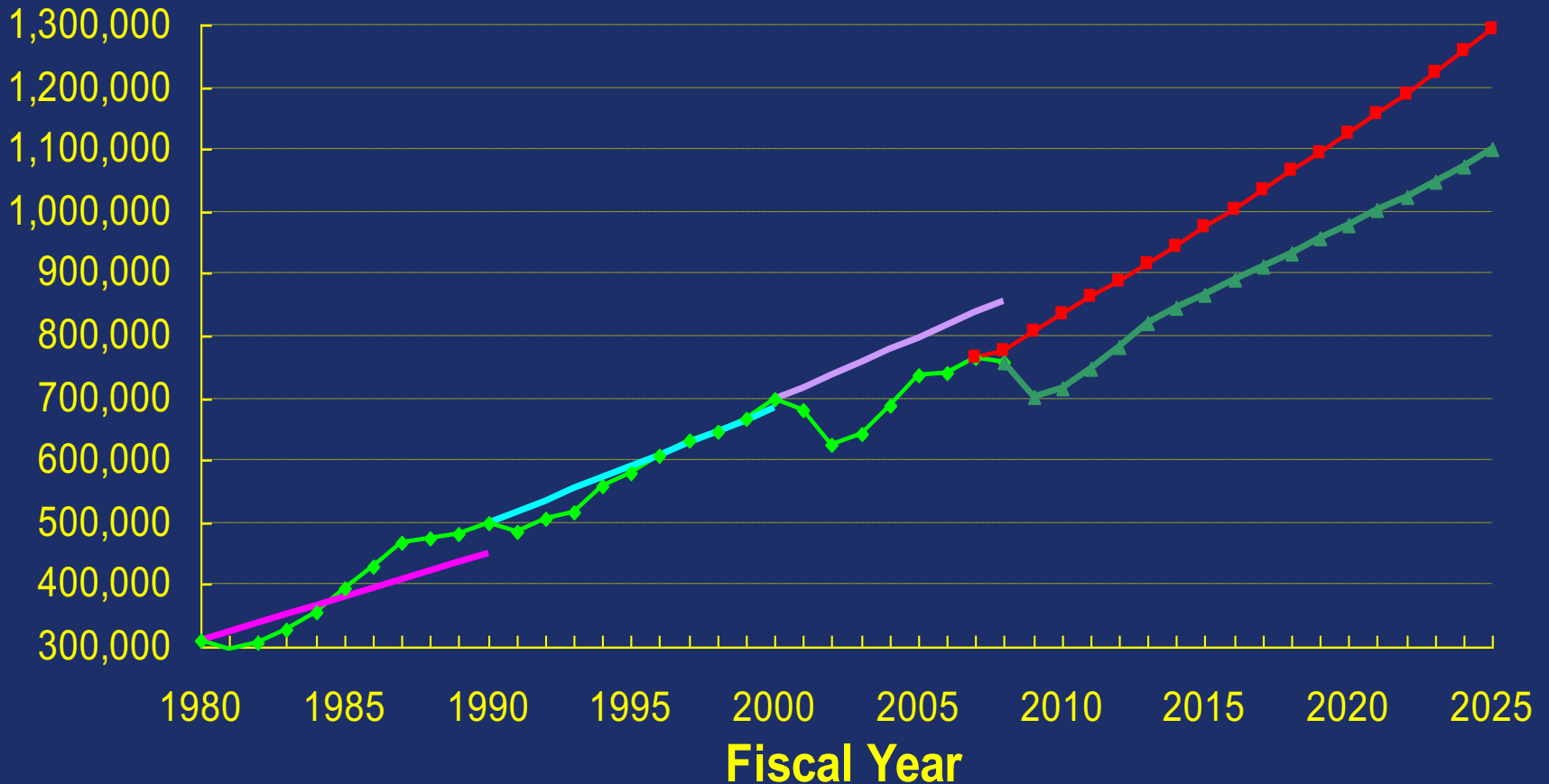
# Forecast Overview FY 2009-25

- **Airlines – Sharp downturn then modest growth**
  - 2009: Downturn
    - Passengers shrink 7.3%; RPMs fall 7.1%
  - 2010-25: Growth similar to last year's forecast
    - Passengers increase 2.9% per year; RPMs up 3.9%
    - International grows faster than domestic
    - Load factor remains around 80%
- **General Aviation – Modest long run growth**
  - Fleet grows 17.6%; Flight Hours up 36%
- **Air Traffic - Slower than Airline capacity**
  - Tower Ops grow 1.0% per year; En-Route grows 1.8%

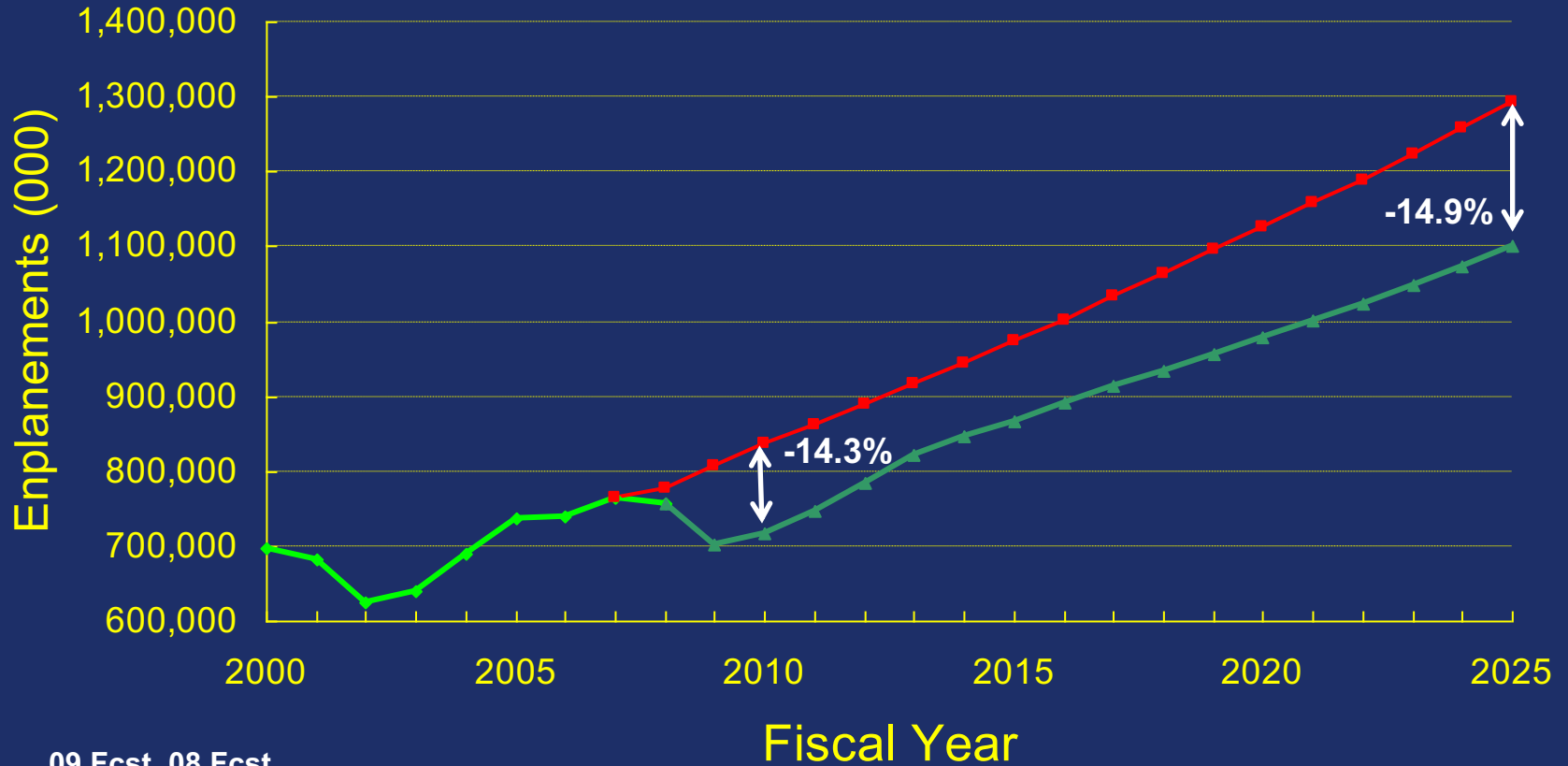


# U.S. Carrier System Enplanement History

Enplanements (000)



# System Enplanements



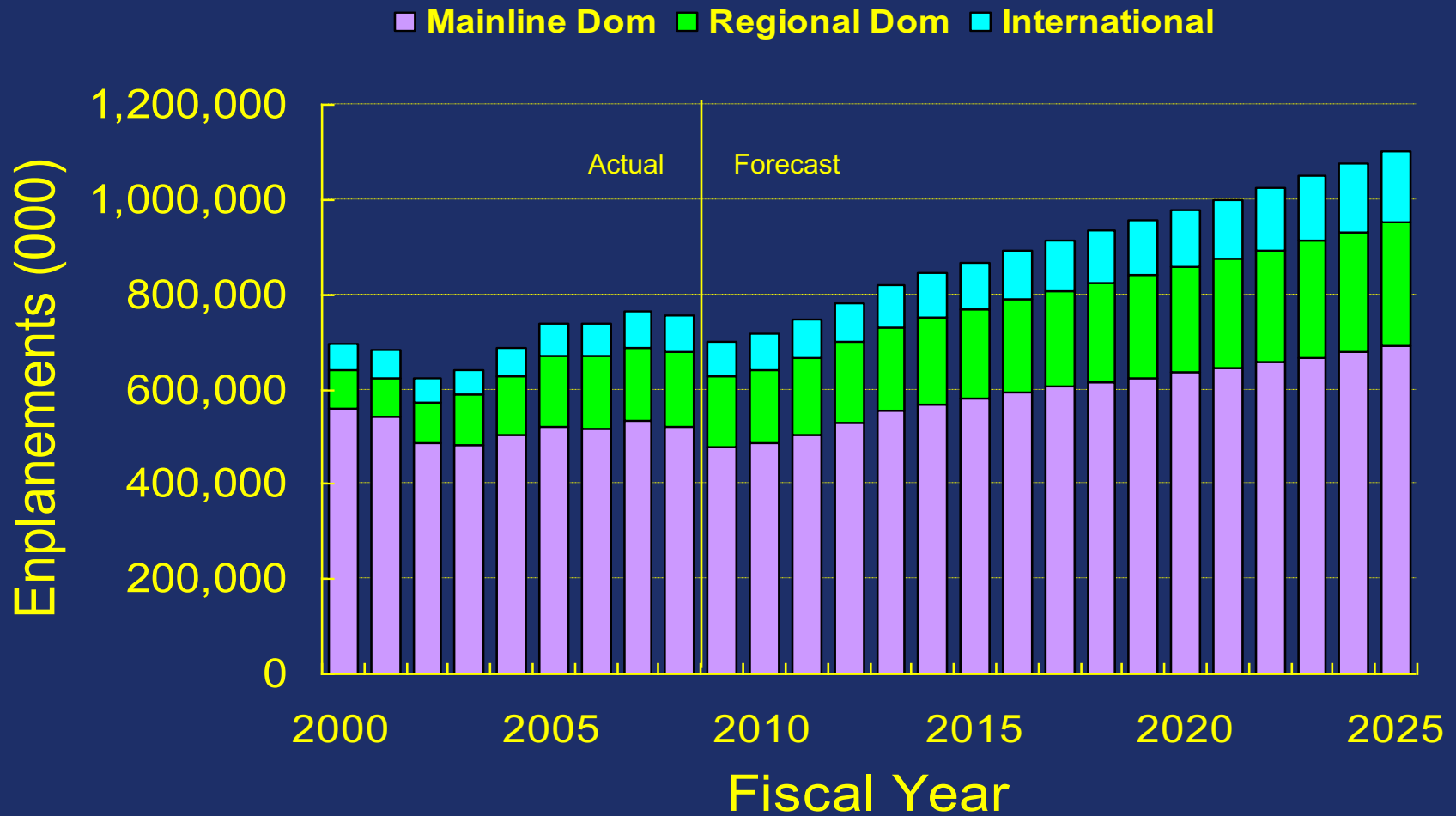
09 Fcst 08 Fcst

2008-2009:	-7.3%	3.8%
2010-2025:	2.9%	2.9%
2008-2025:	2.2%	3.0%

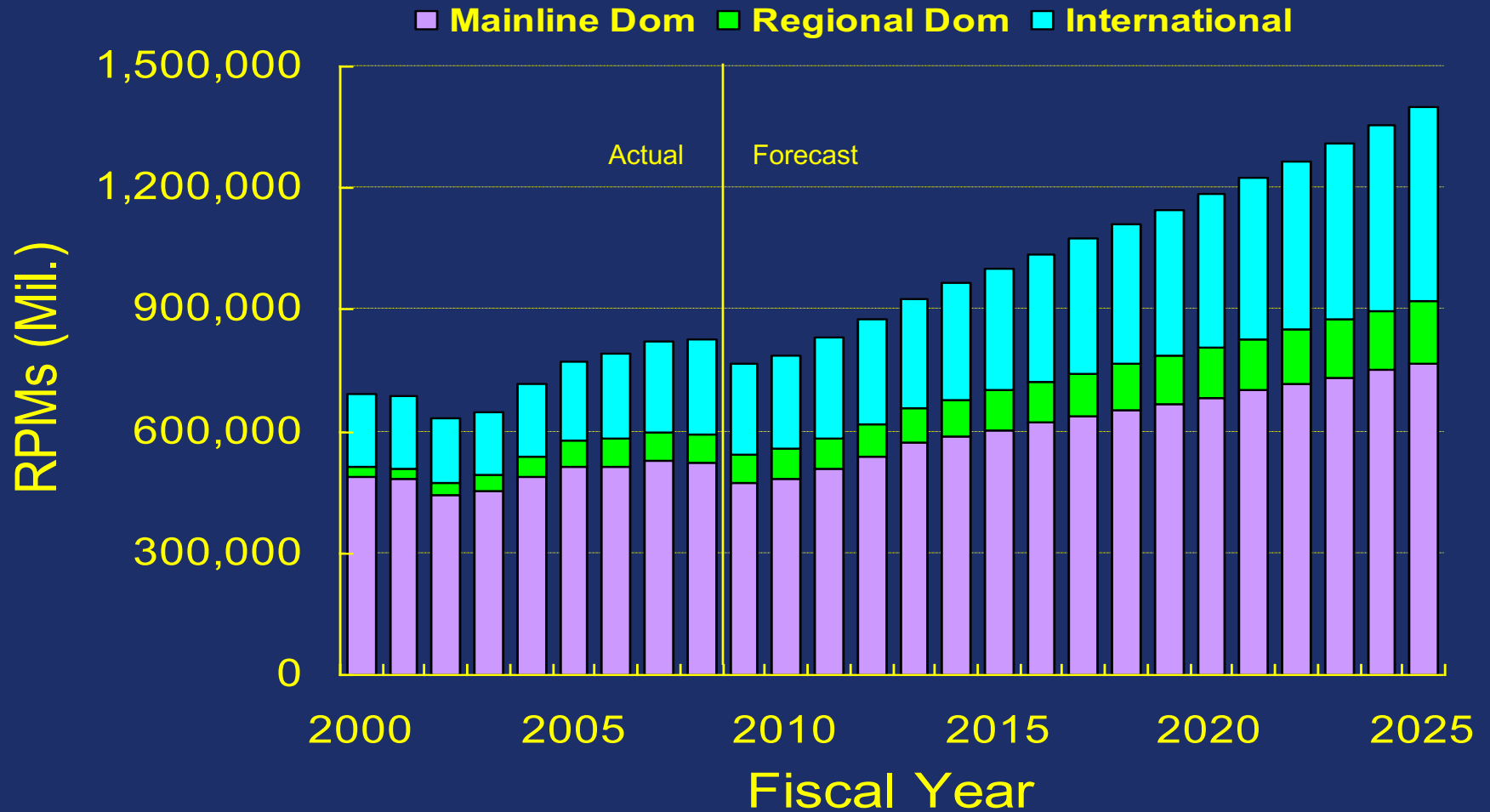
Actual 08 Fcst 09 Fcst



# System Enplanements

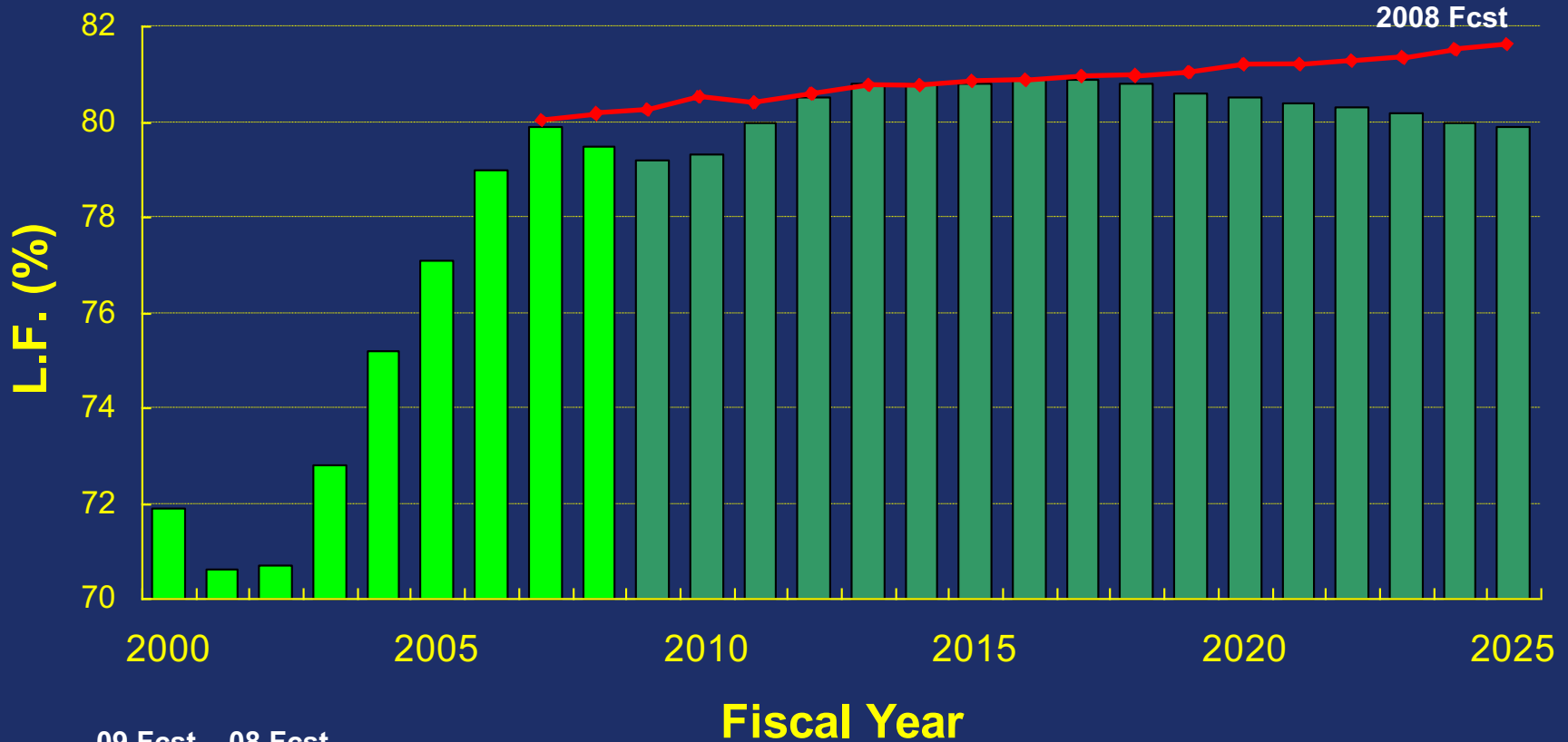


# System RPMs





# System Load Factor



09 Fcst    08 Fcst

Fiscal Year

■ Actual    ■ 2009 Fcst

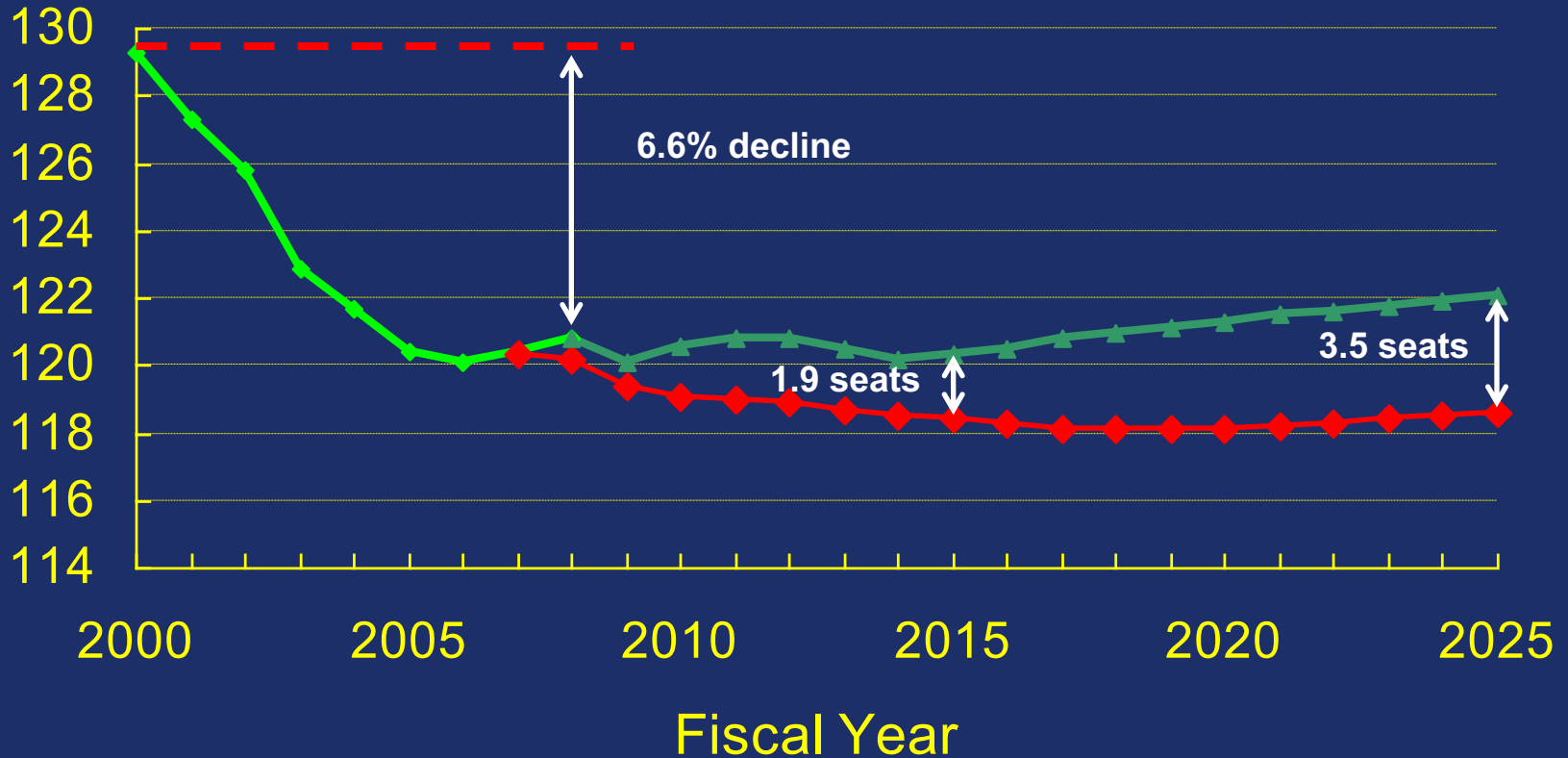
2008-2009: -0.3 Pts    0.1 Pts

2010-2025: 0.0 Pts    0.1 Pts

2008-2025: 0.0 Pts    0.1 Pts



# Domestic Seats per Aircraft Mile



09 Fcst 08 Fcst

2008-2009: -0.7 Sts -0.8 Sts

2010-2025: 0.1 Sts 0.0 Sts

2008-2025: 0.1 Sts -0.1 Sts

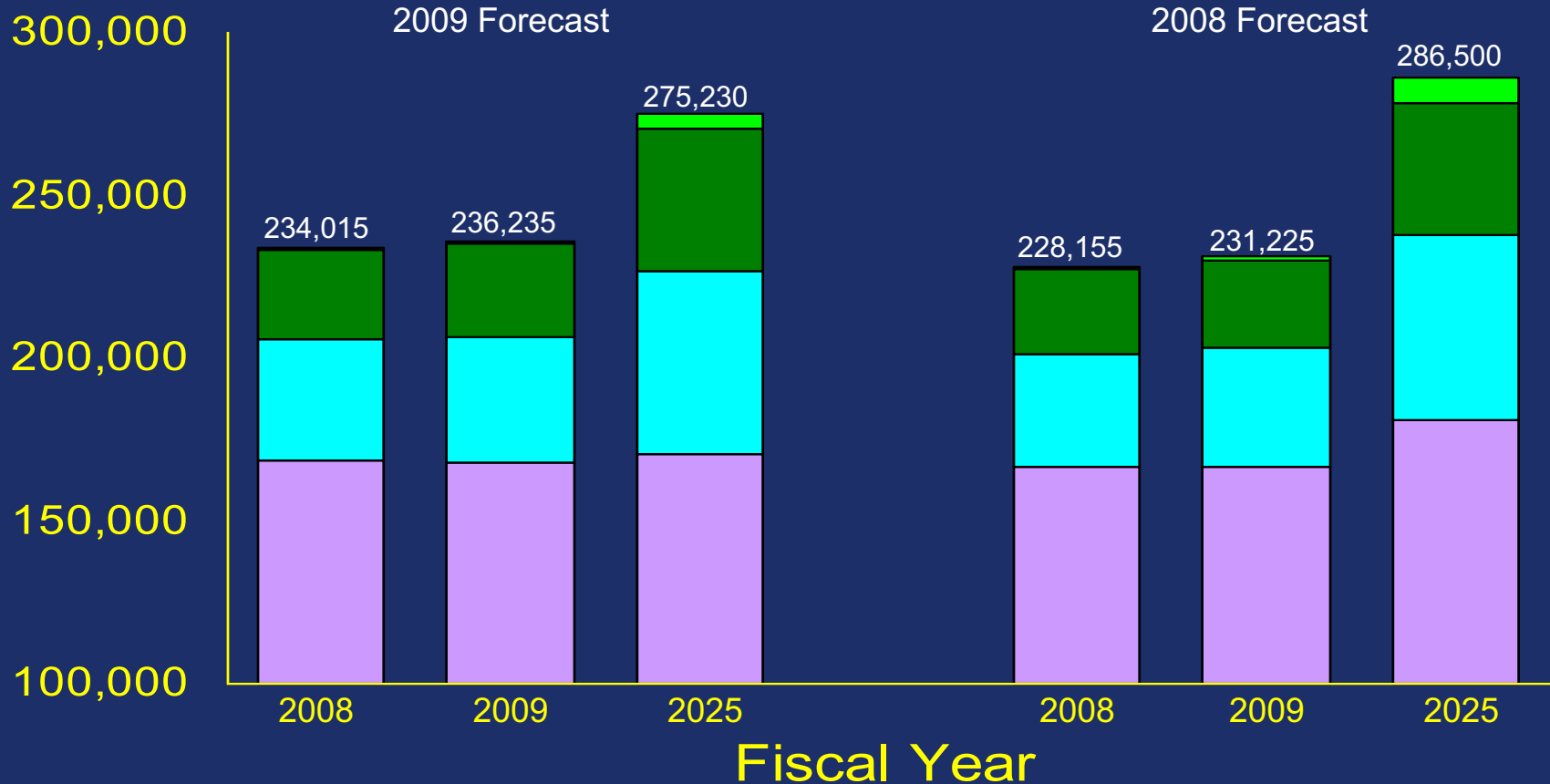
Actual 08 Fcst 09 Fcst



# U.S. Active General Aviation Fleet

No. Of Aircraft

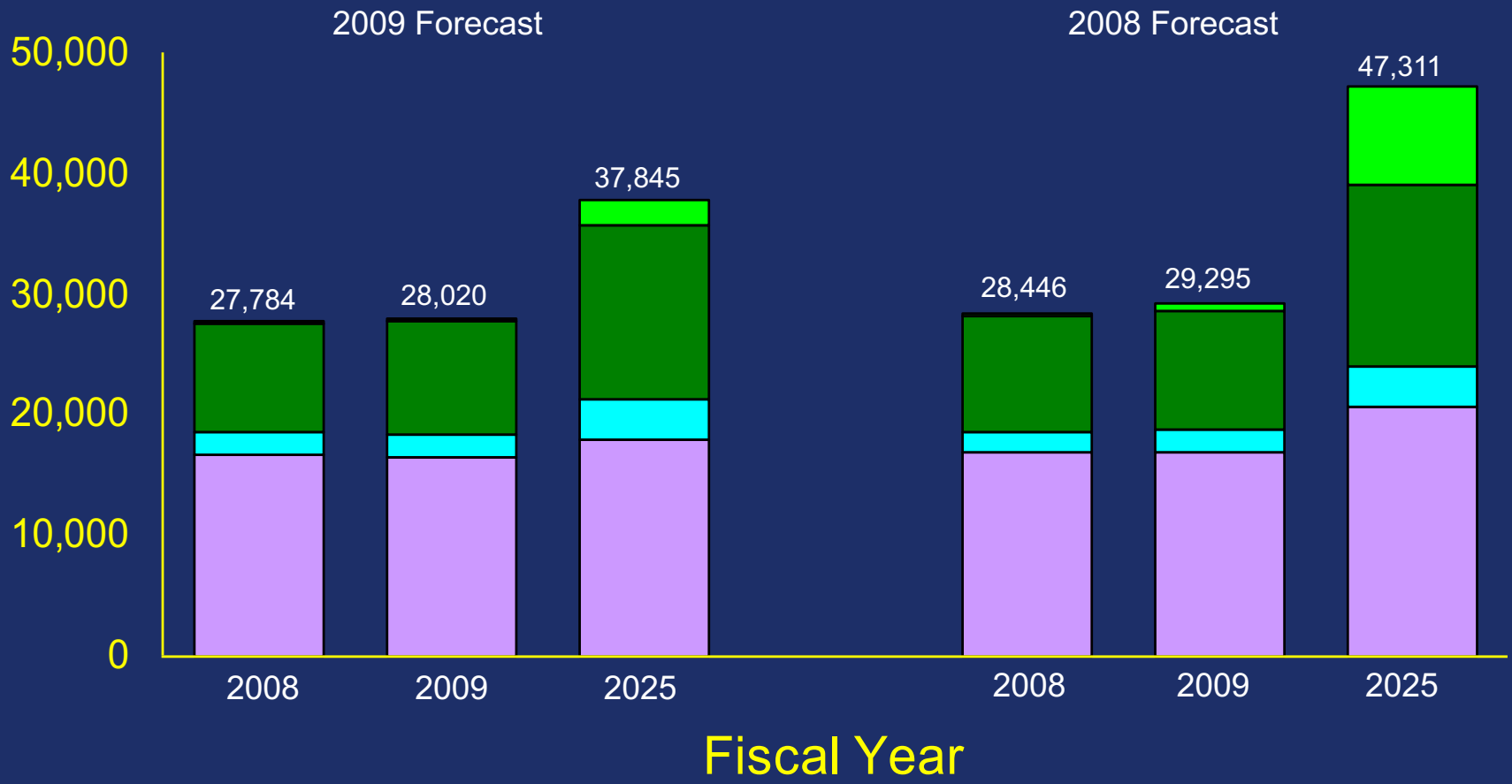
■ Piston 
 ■ Exp, LSA, Oth 
 ■ Non VLJ Turbine 
 ■ VLJ



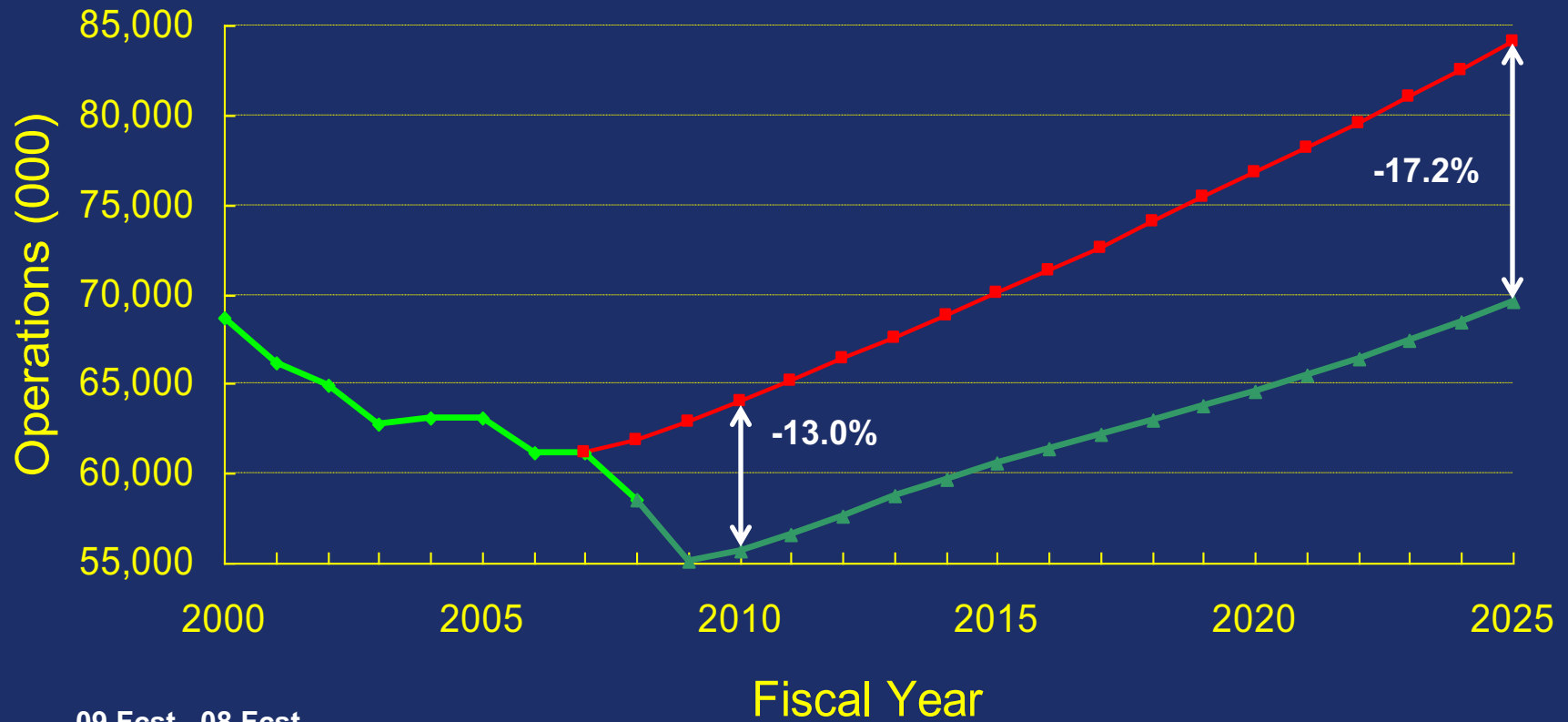
# U.S. General Aviation Flight Hours

■ Piston 
 ■ Exp, LSA, Oth 
 ■ Non VLJ Turbine 
 ■ VLJ

No. Of Aircraft



# FAA and Contract Towered Airport Operations



09 Fcst 08 Fcst

2008-2009: -5.7% 1.7%

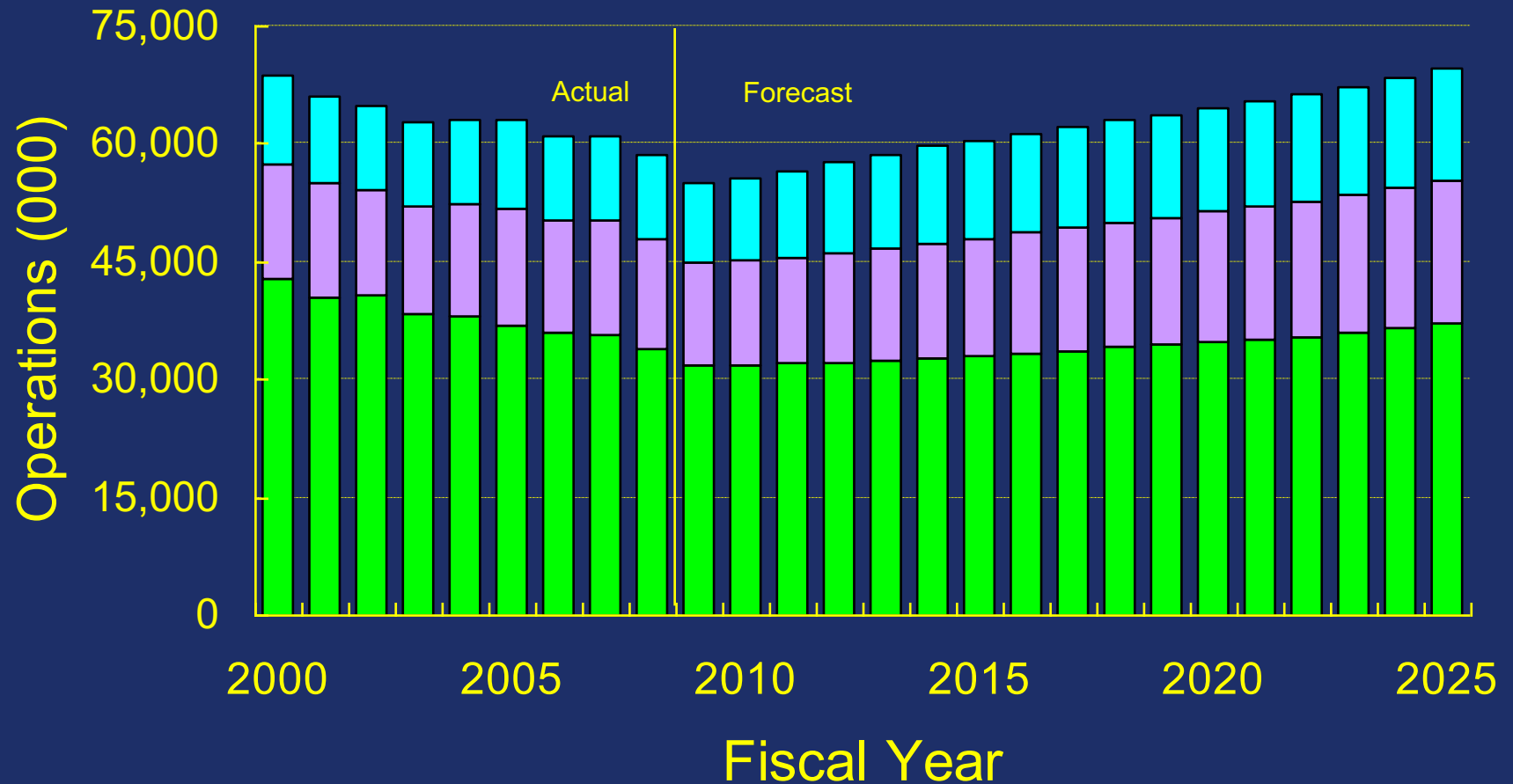
2010-2025: 1.5% 1.8%

2008-2025: 1.0% 1.8%

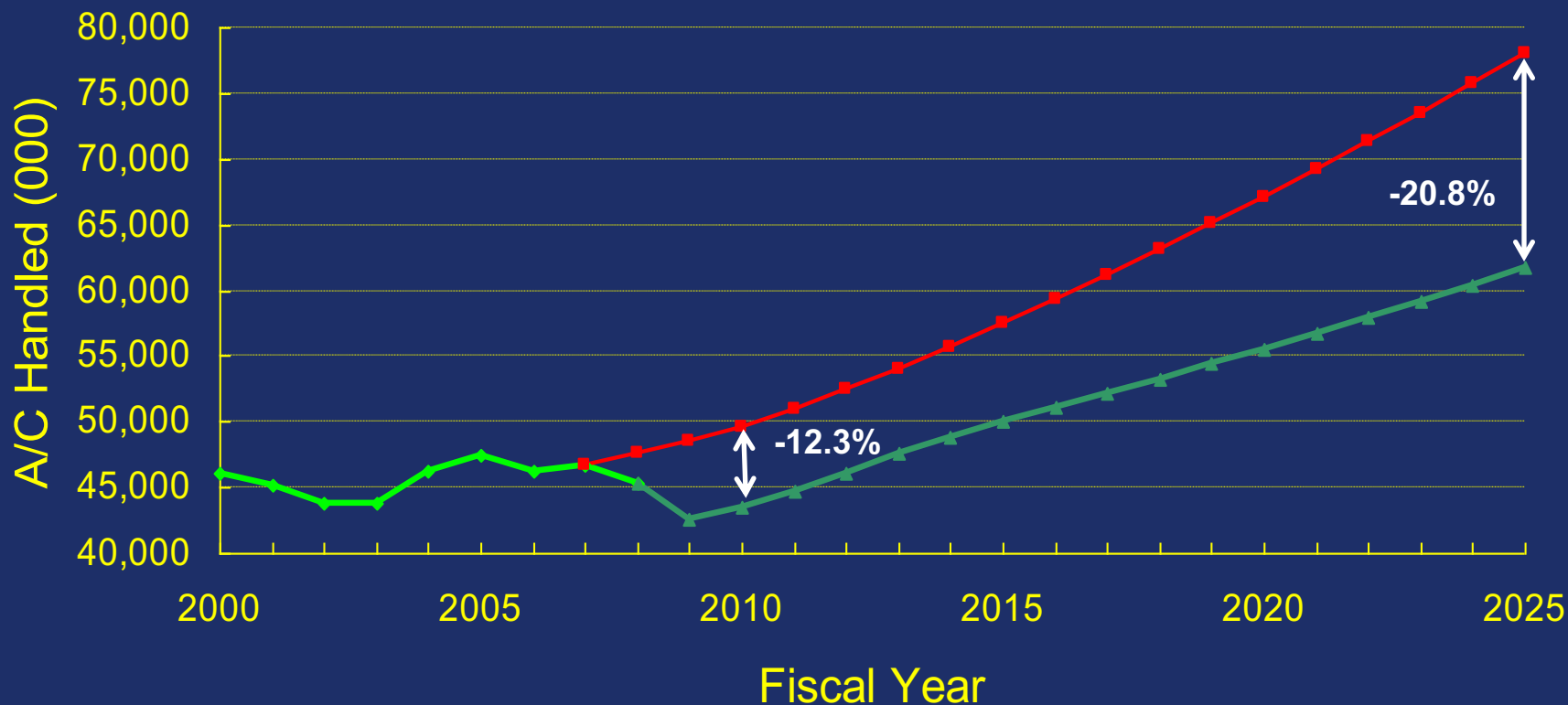


# Tower Airport Operations

■ Non Commercial ■ OEP 35 Commercial ■ Non OEP Commercial



# En-Route Aircraft Handled

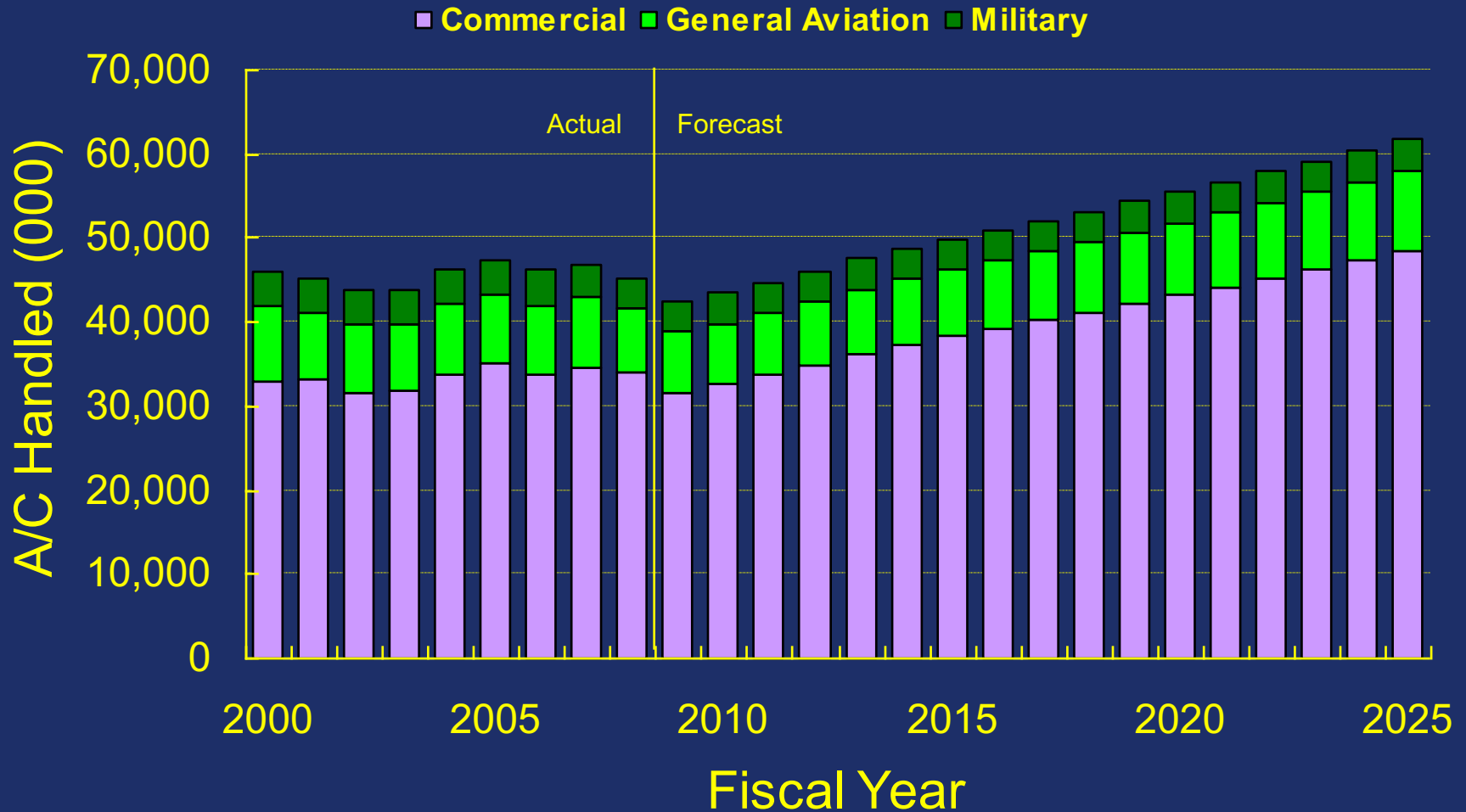


	09 Fcst	08 Fcst
2008-2009:	-6.0%	1.9%
2010-2025:	2.4%	3.1%
2008-2025:	1.8%	3.0%

◆ Actual 
 ■ 08 Fcst 
 ▲ 09 Fcst



# En-Route Aircraft Handled





# Forecast Risks

- **Economy** – when does recovery occur?
- **Energy** – how long will oil prices stay low?
- **Efficiency** – when growth returns, will we be ready?
- **Environment** – what will be impact of new environmental measures to reduce emissions?



# Thank You!

For additional forecast detail:

[http://www.faa.gov/data\\_research/aviation/aerospace\\_forecasts](http://www.faa.gov/data_research/aviation/aerospace_forecasts)

