

MIDDLE EAST AIR TRAFFIC DRIVEN BY TRANSITS



Transits made up 72% of the air traffic growth over the last two years and make up the largest category of air traffic, a new report by ForwardKeys reveals.

The ForwardKeys report looked at all major Middle Eastern air international destinations, from Doha to Dubai and the "extended region" of the Middle East including Turkey. After analyzing the four major air hubs of Dubai (UAE), Doha (Qatar), Saudi Arabia, and Abu Dhabi (UAE) as well as the rest, the authors reported that the local air international traffic had grown by 5.8 million passengers between 2010 and 2012 to 46.2 million. **The bulk of this growth (4.2 million) came from transit traffic, i.e. passengers going to a different destination.**

Overall, just three countries in the Middle East made up 67% of the region's 2012 air traffic. The "rest" were not broken down by country or destination in the ForwardKeys report, accounting as they did for just 33% of air international traffic in the region and seeing a negligible 1% growth. In other words, Middle Eastern air international traffic is heavily concentrated in a few highly developed hubs, and this concentration is only growing.

The UAE, Saudi Arabia, and Qatar saw an average of 14% growth over the two year period. As the most transit dependent hubs, Abu Dhabi and Doha profited the most from the surge in transitory traffic, seeing their traffic numbers rise 38% and 33% respectively

Dubai, as the Middle East's single busiest air travel destination, saw a relatively modest 19% growth, weighted heavily in favor of transitory passengers but with inbound travelers making a respectable 31% contribution to traffic growth over the two year period. By comparison, Dubai's outbound traffic grew just 1%.

Doha benefited considerably from its status as a Middle Eastern hub. Its 33% jump in traffic was almost entirely (80%) due to transitory passengers traveling on to other destinations. Inbound and outbound travel grew 9 and 10% respectively, bringing the total passenger figure to 6.5 million in 2012, 4.9 million of which were transits.

Saudi Arabia's slim 11% growth (over the entire country) was unique among the major Middle East destinations, with the gain balanced between inbound and outbound (49% and 67%) passengers with a net loss in transit passengers. Since 2010, the number of people using Saudi Arabia as a hub has actually dropped, perhaps due to the rising popularity of cities nearby for that purpose. **On the other hand, Saudi Arabia was the only major destination to see significant growth in both outbound and inbound traffic.**

Abu Dhabi saw the greatest increase in traffic of any Middle Eastern city. The Emirati capital saw 1.2 million more people pass through its airport in 2012 than in 2010, and like Doha, just over 80% of them were transit passengers traveling on.

Worth considering in any analysis of Middle East related traffic is also Istanbul. ForwardKeys

analyzed it as part of the Middle East's "extended region," finding that international transit growth in Istanbul was, on a percentage basis, almost twice as large as Doha's 37%, coming in at a remarkable 74% gain in two years to 4.8 million. This finding underscores the importance of Turkey as a link between the European continent and Asia. In terms of sheer volume, Istanbul still comes in just a hair behind Doha and a fair share less than Dubai's 7.8 million passengers a year.

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