

GOODS AND PASSENGER TRANSPORT IN THE ECONOMIC CRISIS

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The economic and financial crisis has a considerable impact on the transport sector. Less trade leads to fewer transports, changed economic framework conditions have an influence on occupational and private mobility. The current situation has different impacts on goods and passenger transport. While goods transport is characterised by unusual large decreases in all areas, passenger transport by bus and rail recorded increases in the first quarter of 2009.

Sharp fall in sea and air freight

Transports handled at German sea ports fell by nearly one fifth in the first quarter of 2009 compared with the same period a year earlier. In August last year the transport volume rose by some 10% but growth has fallen sharply since September and decreases in the transport volume have been observed since November. The worst result so far was recorded in February 2009 (-20.9%). It must however be taken into account here that February 2008 was by one day longer than February 2009. In sea transport involving German ports a total of 316.7 million tonnes were transported in 2008.

Goods transported by aircraft in 2008 (3.5 million tonnes) were just a fraction of the volume of sea freight, although those goods are particularly high quality. The air freight volume decreased considerably in the first quarter of 2009 (-14.5% on the same period of the previous year), though less strongly than the volume of sea freight. The decrease started in November 2009, too, and reached a particularly low level in February 2009 (-17.5%). The current results show an even more negative trend for April (-20.7%), although it should be taken into account that the Easter holidays were in April this year. First results for May, however, indicate a slowdown in the negative trend: The volume of air freight for Frankfurt, which is the most important freight airport, decreased much less strongly in May (-17.1%), following massive falls in the period from January to April (-23.1%).

The decrease was particularly serious for goods leaving the country: Here the decreases in sea freight (-21.6%) and air freight (-16.3%) in the first quarter of 2009 on the same period of the previous year were markedly higher than the overall level. That trend is reflected by the results of foreign trade statistics: In the first quarter of 2009 the volume of exports was down 21.8% on the same quarter a year earlier. In April 2009 the year-on-year downward trend increased again (-24.8%).

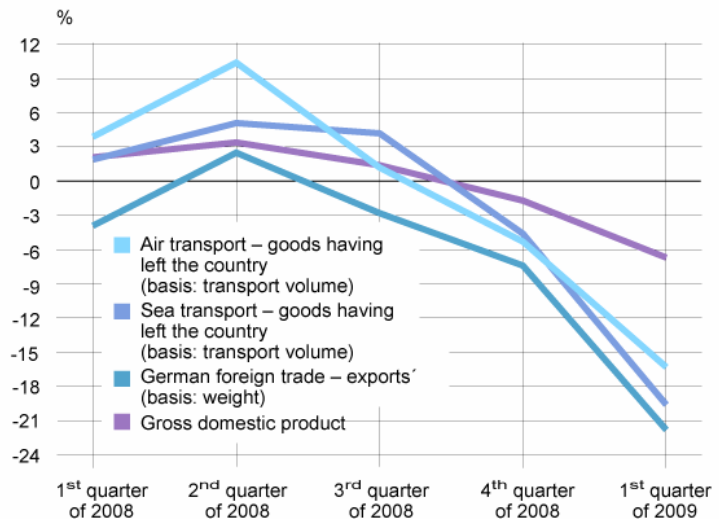
Large decrease in rail freight transport and in inland waterways transport

Rail freight transport, too, recorded considerable decreases (-21.2%) in the first quarter of 2009. Similar to sea and air transport, the decreases observed here started last November. However, the year-on-year decrease in the volume transported by railway enterprises was largest in January (-27.9%). Since then the decline has slowed down a little. In that area, too, the volume of goods leaving the country was much more strongly affected by the crisis than the quantity of goods entering Germany. Altogether, a total of 371.3 million tonnes of goods were transported in rail freight transport in 2008.

The volume of goods transported on German inland waterway vessels in 2008 (245.7 million tonnes) was smaller than the volumes in rail freight transport and sea transport. For this year, results have so far become available only for January and February: In the first two months of 2009, the volume of goods transported by vessels on German inland waterways was down by 23%, which was slightly less than the decrease observed for rail freight transport (-24.3%) in the same period.

Comparison of the trends in air transport, sea transport, foreign trade and gross domestic product

Change on the same period of the previous year



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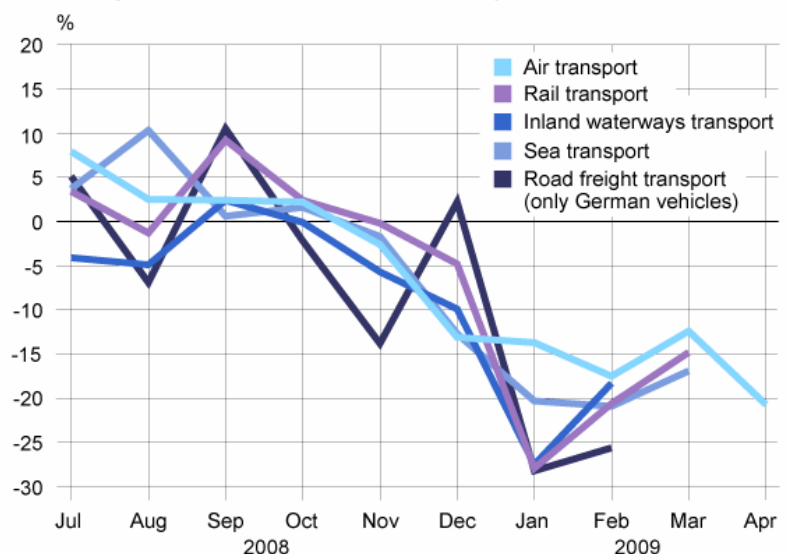
Largest decline in freight transport by road

The largest decrease among all modes of transport in the first two months of 2009 was observed for road freight transport (-26.9%). Here the worst result so far has been recorded for January (-28.2%). Road freight transport covers the transport for hire or reward and on own account by all German lorries, while transports by foreign vehicles are not covered. In January and February 2009, transport on own account (-30.7%) was affected much more seriously by the economic and financial crisis than transport for hire or reward (-24.6%). In

quantity terms, road freight transport is the most important mode of transport: In 2008, a total of 3.1 billion tonnes of goods were transported on German lorries.

Trend of transport volume by modes of transport

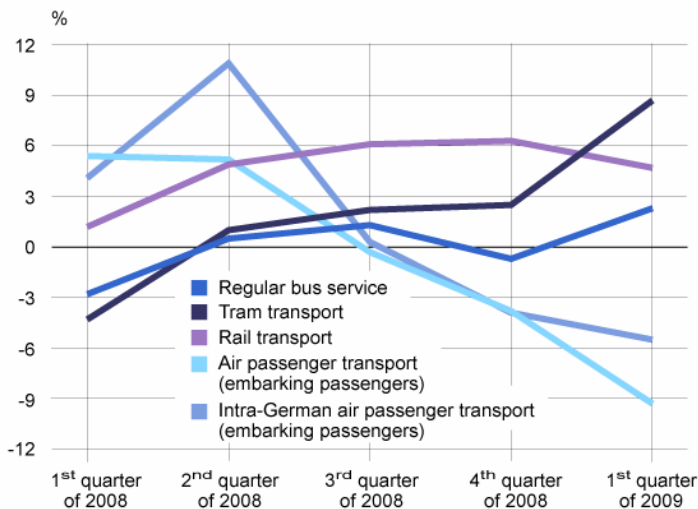
Change on the same period of the previous year



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**Trend of passenger transport
(basis: passengers carried)**

Change on the same period of the previous year



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Decline in air travels

Negative effects of the current economic situation are also observed for air travels. From January to April 2009, the number of passengers leaving from German airports was down by 8.3% from the same period a year earlier. However, the downward trend in that area started already at the beginning of the second half of 2008. While previous year's positive trend slowed down just slightly in the first half (+4.9%), the crisis had a marked impact in the second half. In July 2008 the level of a year earlier was almost reached again (-0.2%). In August the numbers of air passengers started to decrease more strongly and the largest decreases were recorded at the beginning of 2009 (-11.4% in February and -7.2% in March). It should also be

taken into account here that February 2008 had one day more because of the leap year.

Altogether 95.1 million embarking passengers and 95.3 million disembarking passengers were counted at German airports in 2008, while intra-German transport accounted for 24.7 million passengers. As passengers with just one air travel within Germany are counted only once, the total number of air passengers amounted to 165.6 million.

More passengers on buses and trains

Contrary to the general downward trend, passenger transport by bus and rail recorded increases in the first quarter of 2009. This refers to motorbuses, trams and railways. The increase was largest for trams (+8.7%). In 2008 the number of tram passengers (totalling 3.6 billion) increased just slightly (+0.4%).

In rail transport the positive trend observed already in the previous year continued in the first quarter of 2009 (+4.7%). However, that growth is based only on short-distance rail transport, while the number of passengers in long-distance rail transport stagnated in the first quarter of 2009. Altogether, rail trains were used 2.3 billion times in 2008.

Most passengers, however, used buses (5.2 billion travels in 2008). Here, too, the number of passengers in the first quarter of 2009 was markedly up (+2.3%) on the same period of the previous year. Passengers travelled almost only in short-distance transport, whereas the number of persons travelling long-distance (2008: 2.2 million) was down by 8.6% in the first quarter of 2009.

The trend of the federal result for tram and bus transport, however, was heavily influenced by a strike in the Land of Berlin that lasted several weeks in spring 2008. Despite that effect, increases were recorded for both modes of transport.