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EUROCONTROL

FORECAST UPDATE 2024-2030

SPRING 2024

SUMMARY

- This **7-Year Forecast (Spring 2024)** builds upon the Autumn 2023 publication and incorporates the latest flight trends, including a comprehensive update of forecast inputs.
- Despite a strong Summer 2023, the number of European flights has shown lower-than-expected volumes since November 2023 – with local disparities between eastern and western States.
- There has been a **downward revision in the economic forecasts** for 2024 at the European level.
- The expected number of flights in Europe has been slightly revised **downwards** until 2027.
- At ECAC* level, the number of flights is likely to reach 10.6 million in 2024, reflecting growth of 4.9% ($\pm 2.3\text{pp}$) compared to 2023, and accounting for 96% of 2019 levels. This trend is expected to continue, with an increase to 10.9 million (99%) in 2025, and further to 11.2 million (101%) by 2026.
- On a monthly basis, for ECAC* the number of flights is likely to reach 2019 levels during Summer 2025.
- Beyond 2025, flight growth is expected to average 2.0%/year ($\pm 1.4\text{pp}$), rising to over 12 million flights in 2030 in the base scenario.
- Users of the forecast are strongly advised to use the forecast range (low to high) as an aid to managing their own business risks.
- This forecast is subject to various uncertainties, such as the possibility of deterioration/unforeseen geopolitical events, economic shocks, and ongoing challenges in the aviation industry.

* ECAC is the European Civil Aviation Conference

THIS 7-YEAR FORECAST UPDATE COVERS THE 2024-2030 PERIOD

This Spring 2024 forecast contains three scenarios, includes statistical uncertainties, and incorporates the latest updates from the following inputs:



Traffic trends up to January 2024

Continued recovery of the number of European flights since the end of the COVID-19 outbreak, with volumes strengthening during the summer. Some States are already above their 2019 traffic levels. The network is however still strongly impacted by the Russian invasion of Ukraine.



Full review of the following forecast inputs

Latest revision of economic growth, load factors, propensity to fly, demographics, events/trend changes, high-speed rail network developments, market segment developments and airport capacity constraints.



Routings

2023 routes combined with recent trends observed regarding State overflights which are used to forecast overflights.

Technical assumption on routings over the 2024-2030 period

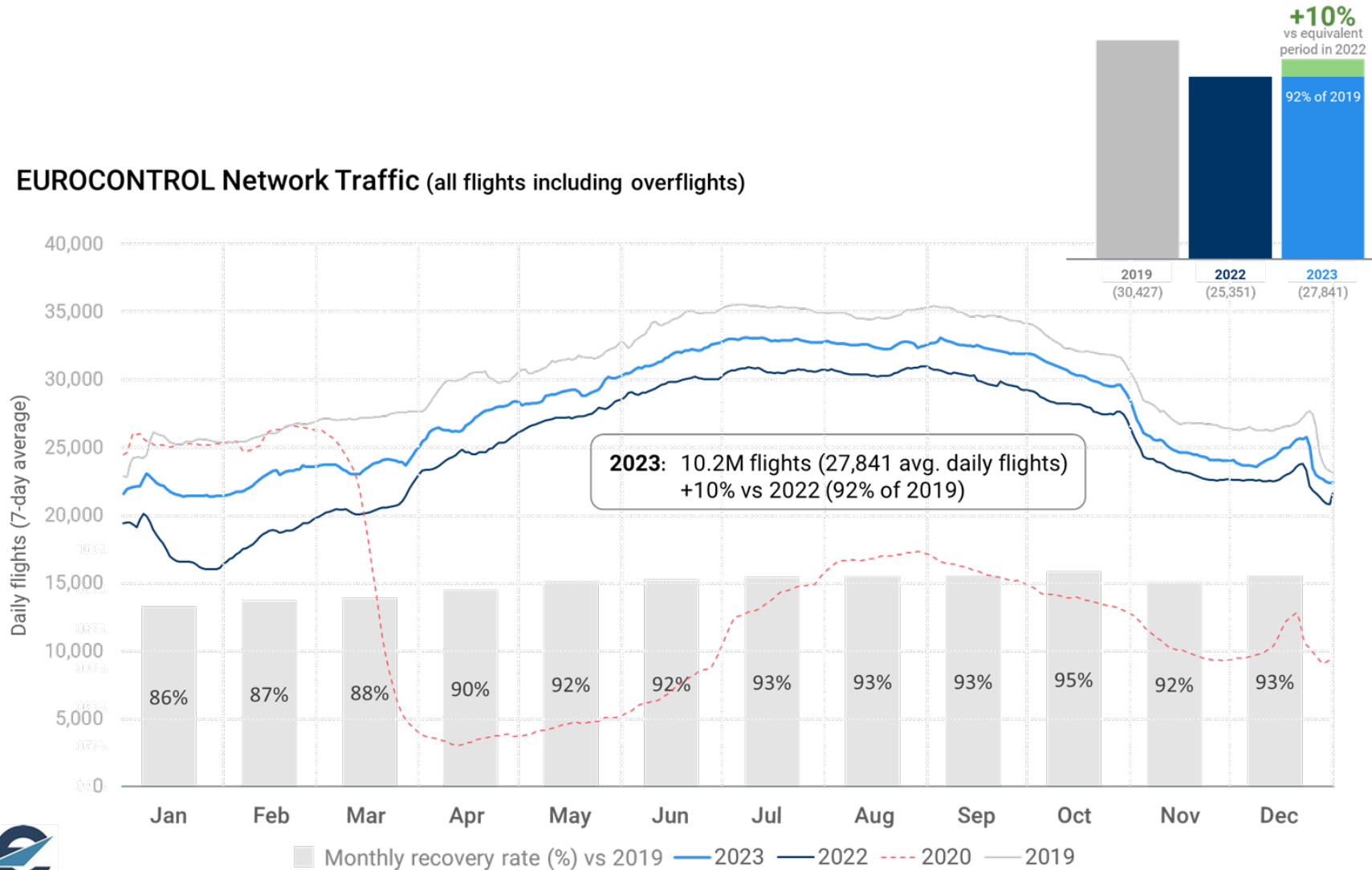
It is impossible to predict when currently restricted airspaces will be fully reopened. This forecast has therefore been prepared using the current status as a baseline. This should not be interpreted as a prediction on the part of EUROCONTROL of any future evolution of these restrictions.

This forecast replaces the Autumn 2023 forecast.



FLIGHT TRENDS

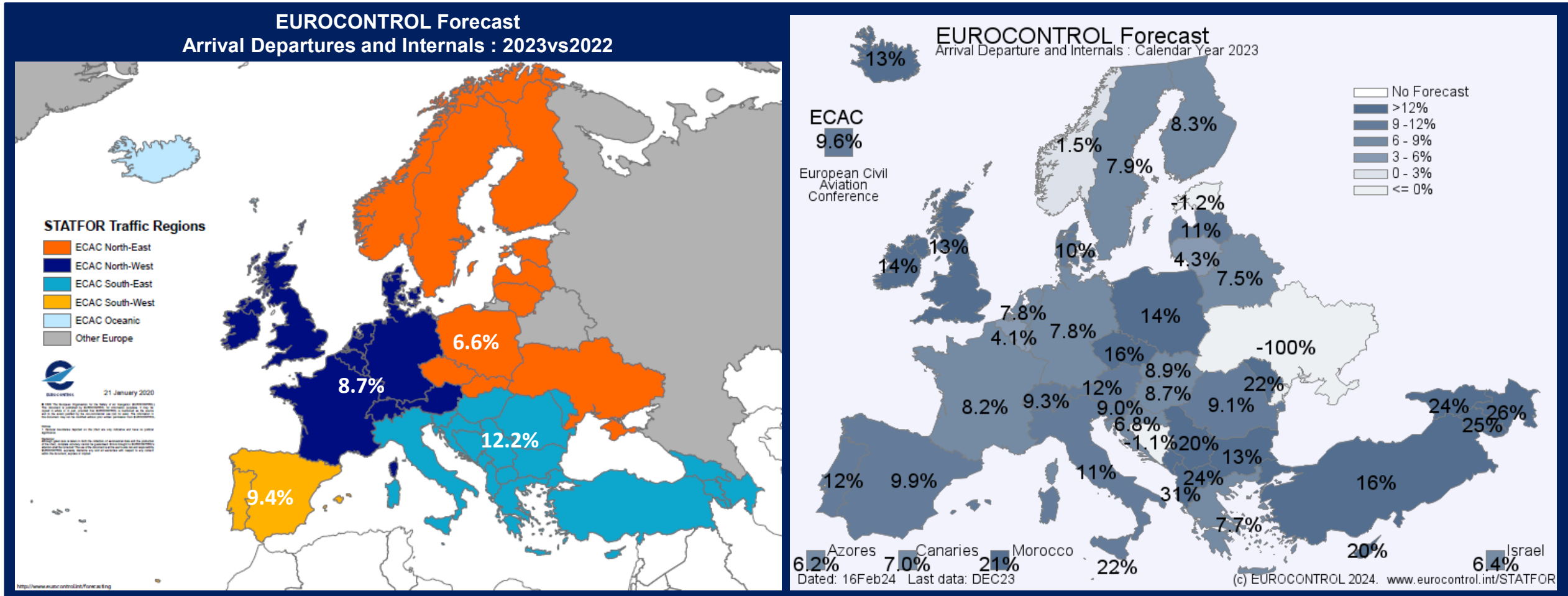
In 2023, IFR movements experienced 10% growth, reaching 92% of pre-pandemic 2019 levels





FLIGHT TRENDS

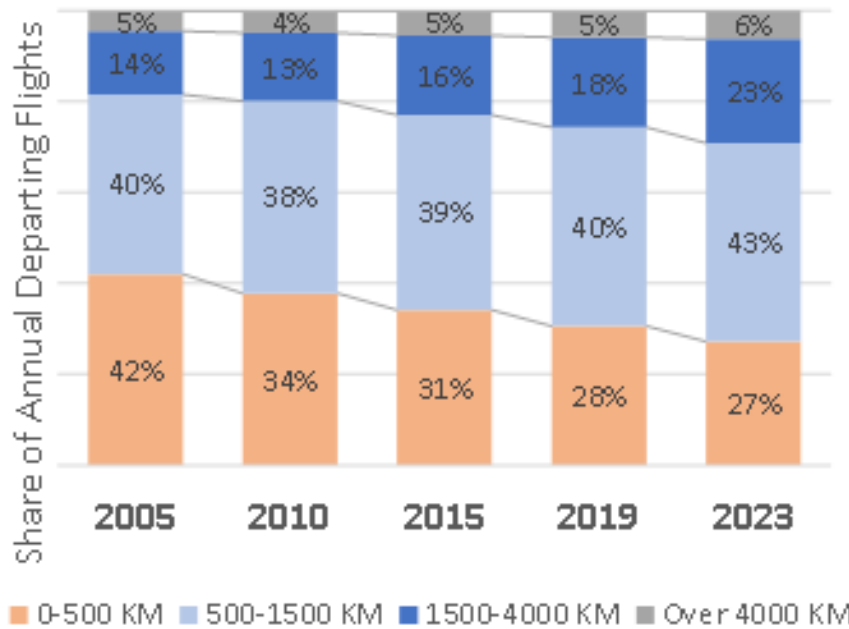
Local disparities persisted in 2023, with the south-east States recording the highest flight growth within the ECAC States





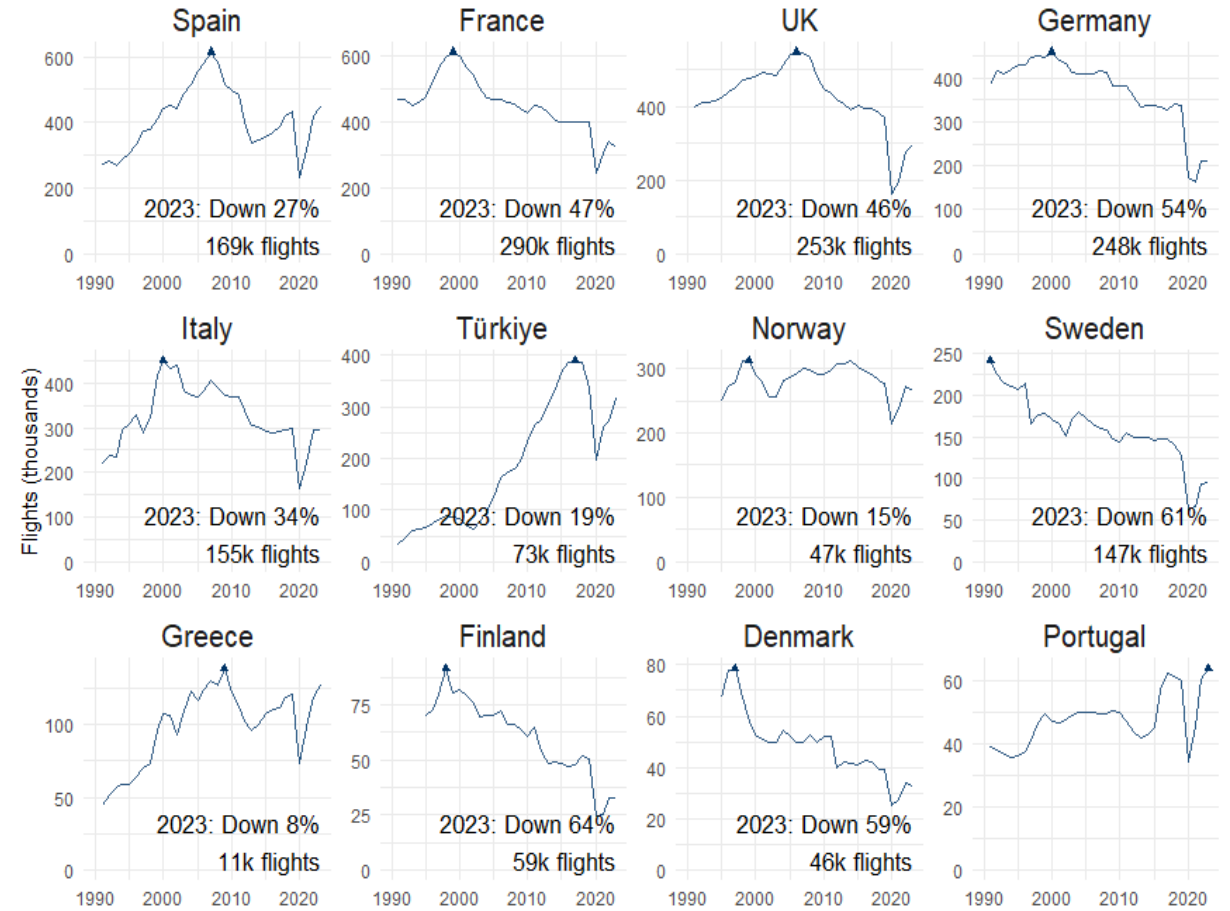
FLIGHT TRENDS

A shifting focus from short-haul to long-haul routes in a dynamic aviation landscape



- ➔ Over the last 20 years, the share of short-haul flights (<1,500 km) has constantly reduced.
- ➔ We have observed a continuous decline in the number of domestic flights in several States.
- ➔ The share of medium- to long-haul (>1,500km) accounted for ~30% in 2023, compared to ~20% in 2015.

Domestic Markets



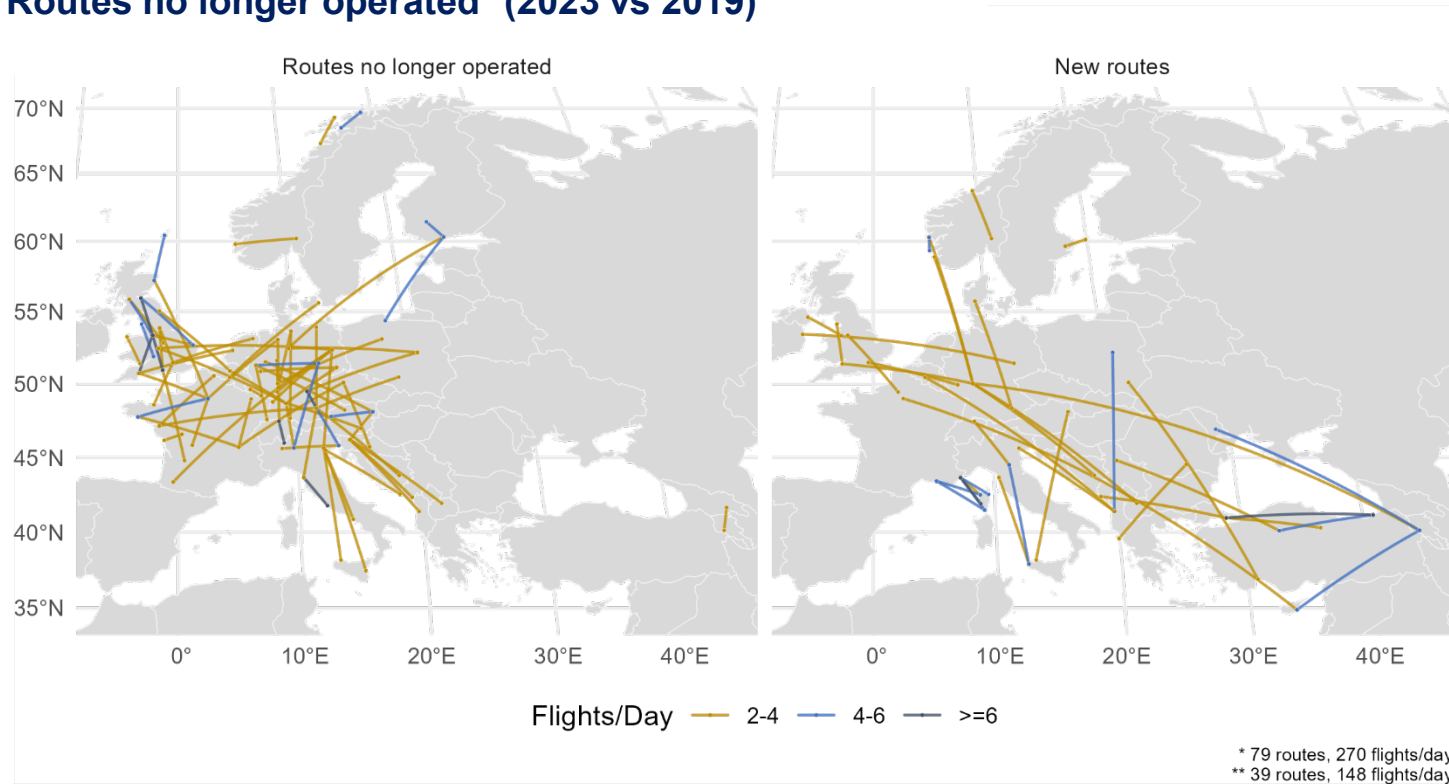
Source: Eurocontrol



FLIGHT TRENDS

A shifting focus from short-haul to long-haul routes in a dynamic aviation landscape

Routes no longer operated* (2023 vs 2019)



* Flights from/to Ukraine, Russia and Belarus excluded. Routes no-longer operated are defined as routes that had 2 or more flights per day in 2019 and less than 1 flight per week in 2023.

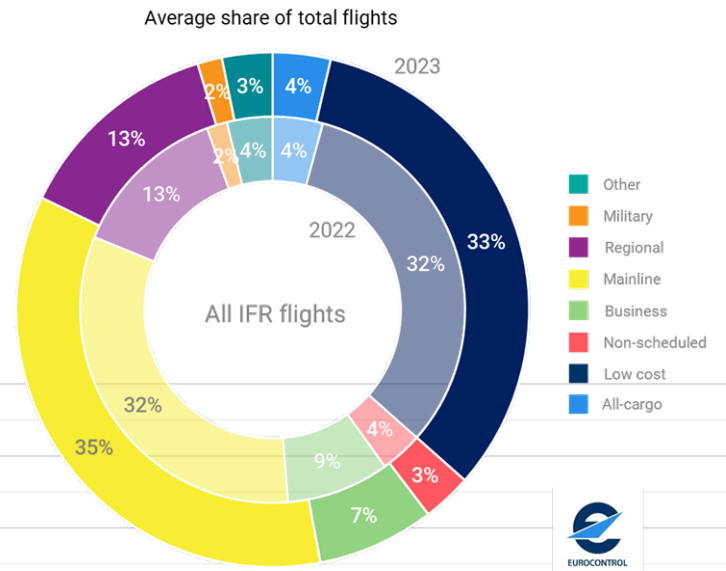
In 2023, compared to 2019:

- ➔ Some short-haul flights have been replaced by enhanced rail/bus services (triggered by reduced travel time or cost); train tickets are now sold by airlines to feed long-haul flights.
- ➔ Government initiatives, environmental campaigns and the rise of videoconferencing are reducing demand for domestic air travel, shaping new traveller preferences.
- ➔ Changes in airline network strategies are driven by airport capacity, improved fleet efficiency and geopolitical considerations.

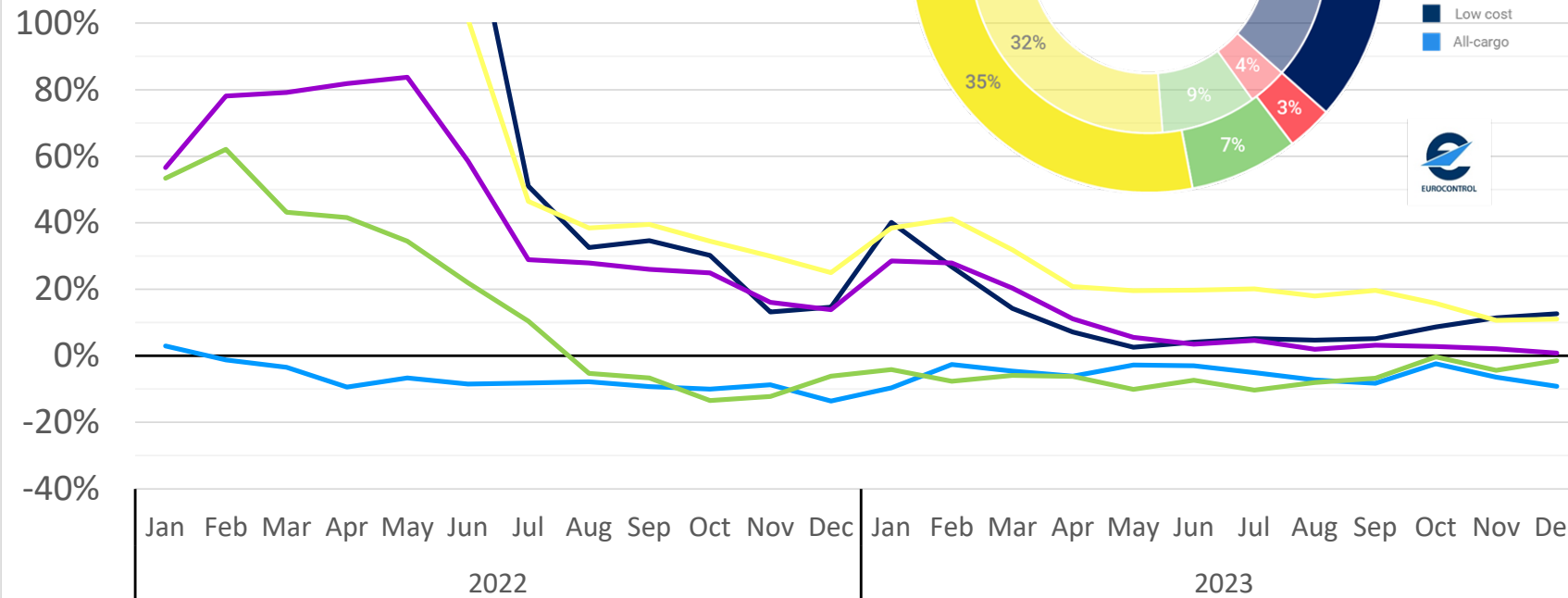


FLIGHT TRENDS

After expanding during the pandemic, the Business Aviation and All-cargo market segments are declining



Monthly flight growth per Market Segment vs previous year



- **Mainline** The largest market segment (36% share), maintaining pre-pandemic levels; double-digit growth in 2023.
- **Low-cost** The second-largest segment (32% share), also sustaining pre-pandemic shares; notable double-digit growth in 2023.
- **Regional** Decline due to a reduction in short-haul flights (see previous slides).
- **Business Aviation** Post-pandemic expansion reversed; 2023 saw fewer flights than 2022, with volumes stabilising.
- **All-cargo** Post-pandemic growth halted in 2022 due to the Russian invasion of Ukraine; the number of flights has stabilised since then.



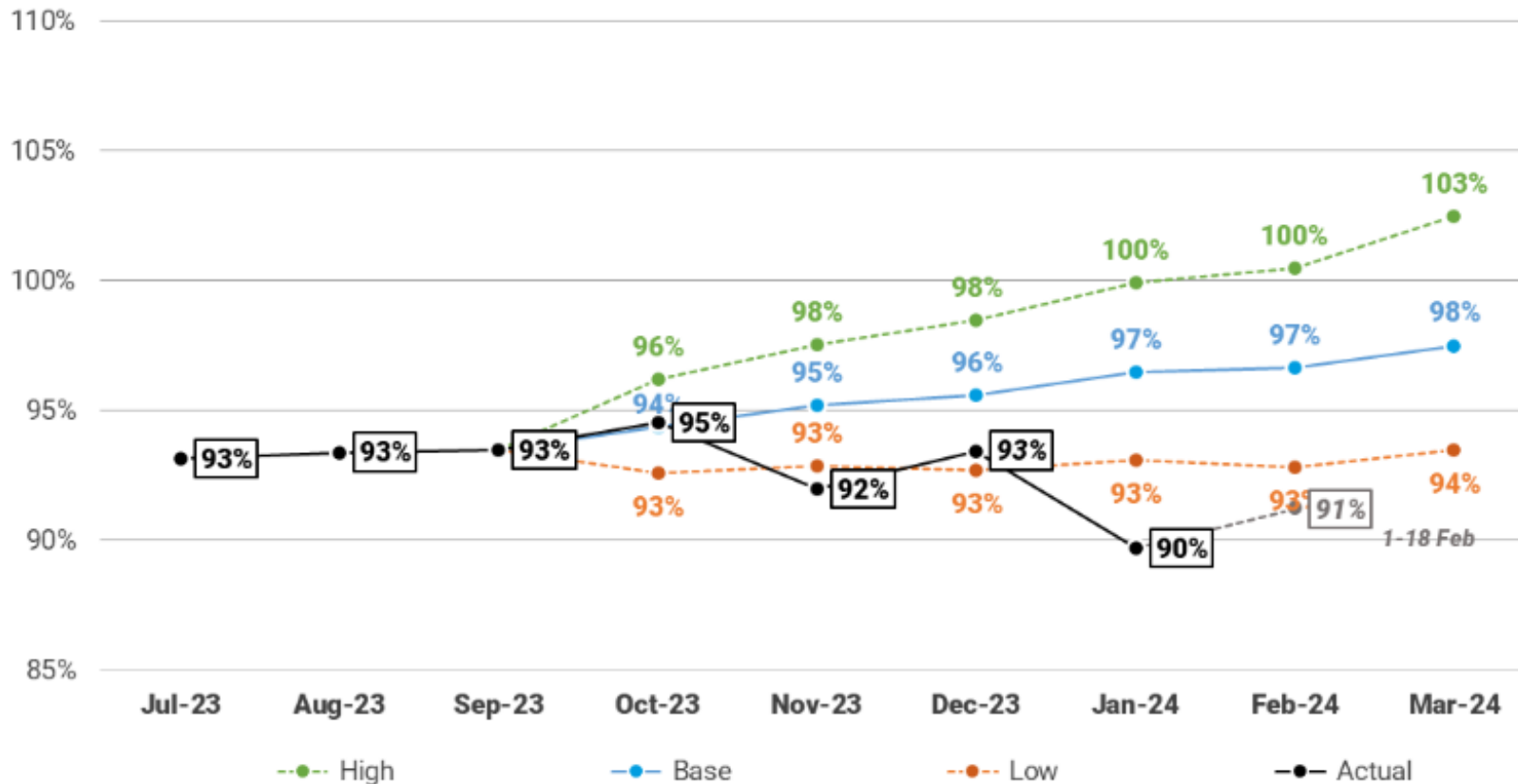
FLIGHT TRENDS

Winter 2023 saw some challenges, bringing traffic levels into alignment with our low Autumn 2023 forecast



EUROCONTROL Monthly Traffic Forecast

(base year 2019)

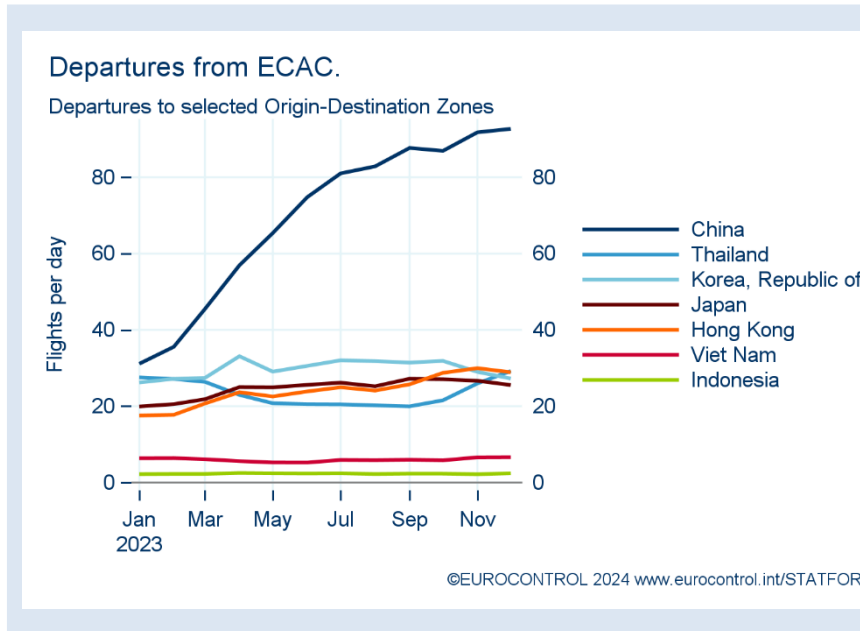


- With the start of the 2023 Winter Schedules (from November 2023), some aircraft operators have started to **cut capacity**.
- In addition, **weather events and industrial action** (leading to cancellations) and the impact of **unforeseen geopolitical events** have hindered the recovery, with traffic reverting to 90-93% of 2019 levels.
- This has led to actual traffic levels realigning with our **low forecast**.

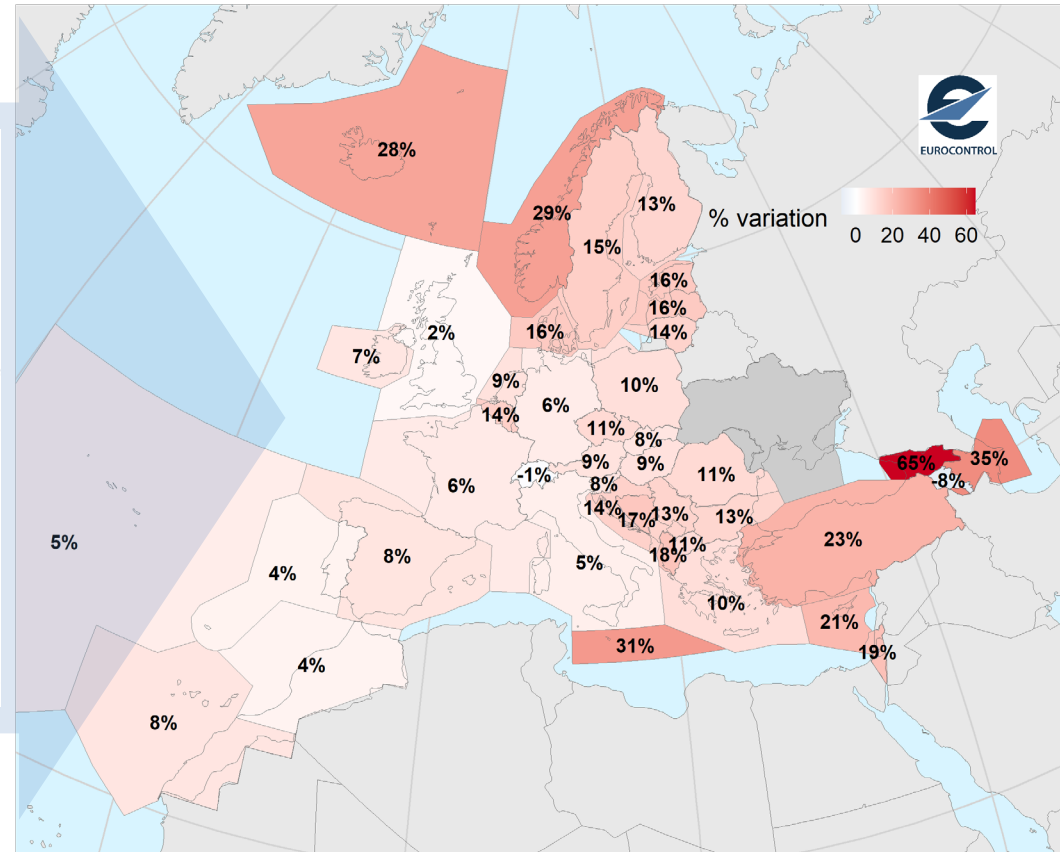


OVERFLIGHT TRENDS

The Chinese air traffic recovery has boosted overflights in south-eastern and Nordic States since the start of the year



Traffic Zone (based on FIR) % Overflights variation August 2023 vs August 2022



The designations employed and the presentation of the material on maps, videos and animations do not imply the expression of any opinion whatsoever on the part of EUROCONTROL concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries

→ Chinese flows have recovered to above 80 flights per day (81% of 2019 levels in the second half of 2023).

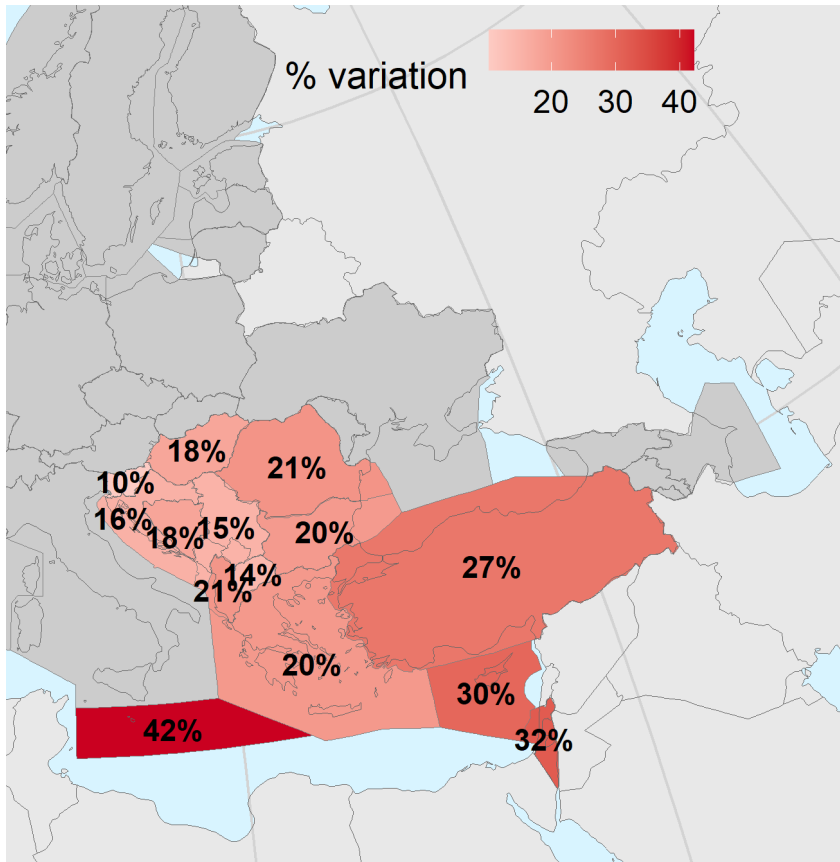
→ Flights to/from Asia are avoiding disrupted areas. Some operators are banned from Russian airspace and need to use longer routes (mostly via Türkiye but also Arctic routes).

→ These flights are increasing overflights in the south-eastern states and some Nordic states.

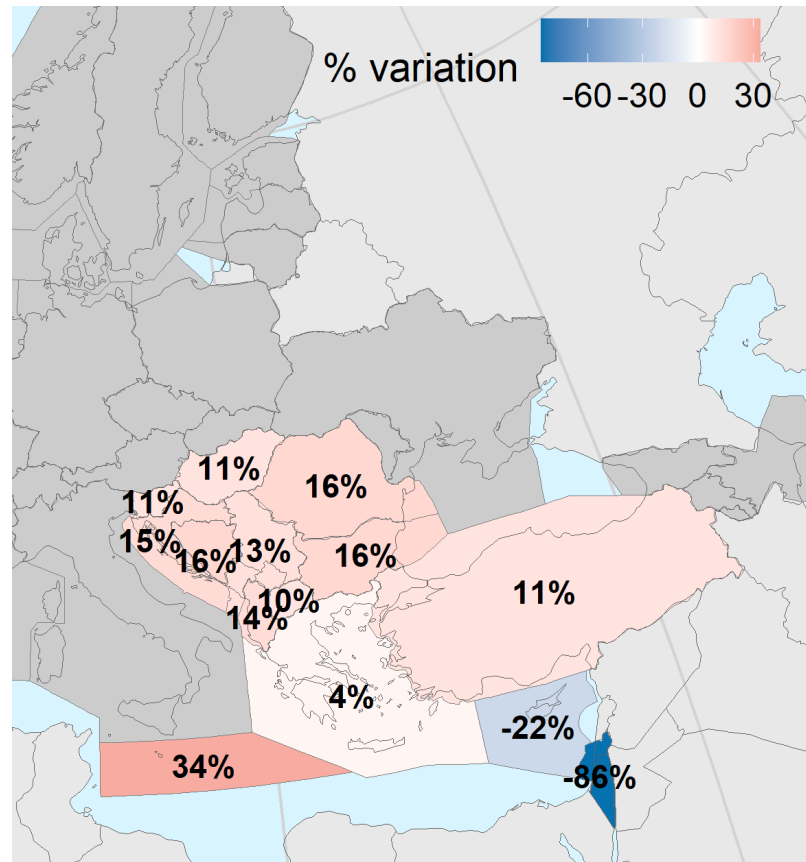


OVERFLIGHT TRENDS

The conflict in Israel has affected eastern Mediterranean overflights since October 2023



Jan-Sep 23 vs Jan-Sep 22 overflights



Oct-Dec 23 vs Oct-Dec 22 overflight variation

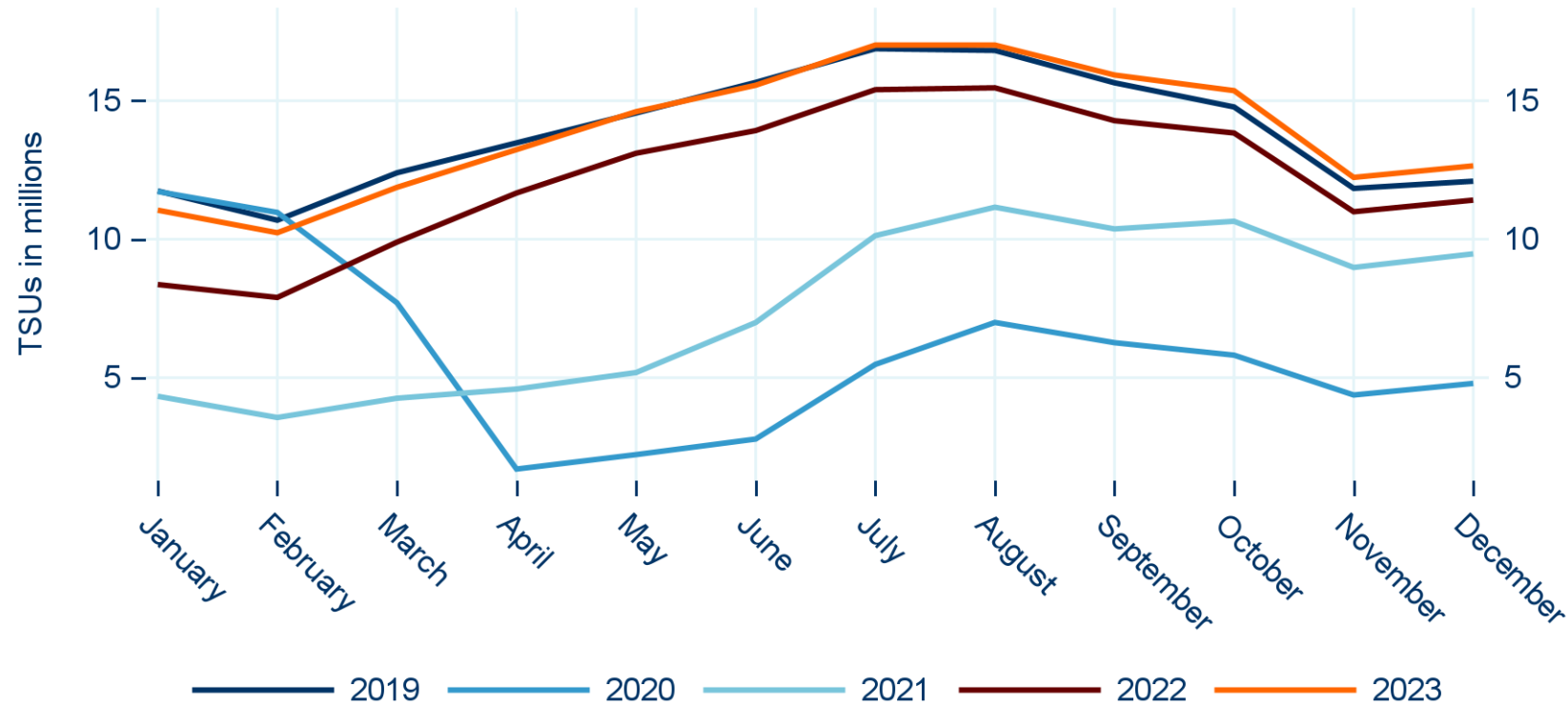
- Conflict in Israel has led to a strong reduction in **arrival/departures in Israel** since October 2023.
- **Overflights** over Israel are not permitted, except flights to/from Jordanian airports.
- Consequently, **overflights in neighbouring states** have been significantly impacted, with Cyprus recording the highest decrease.



EN-ROUTE SERVICE UNIT TRENDS

En-route Service Units* have been at 2019 levels since May 2023

Total service units in CRCO °



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- In 2023 as a whole, Total En-route Service Units (TSU) billed ended up marginally below 2019 levels.
- January 2024 saw **12 million** TSU, **8.5%** above January 2023.

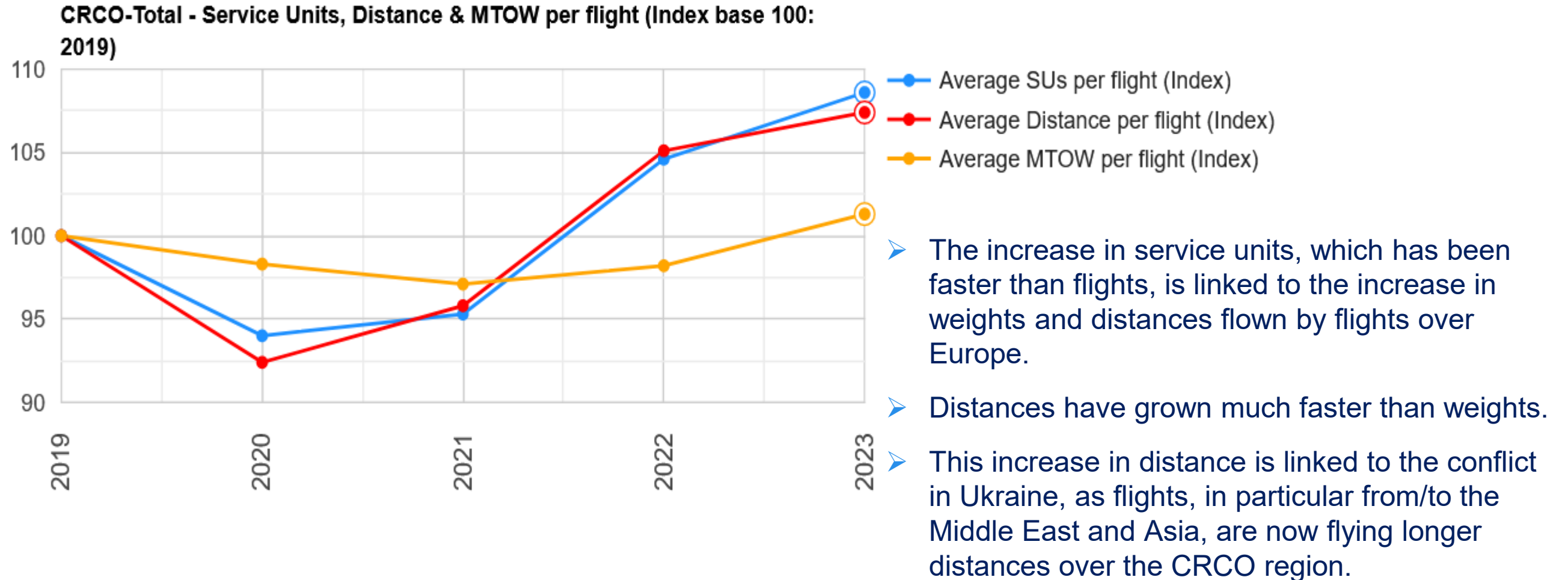
* En-route Service Units are billed for the provision of air traffic control for each flight that flies over the States of the EUROCONTROL area. En-route Service Units are a function of the distance flown and the weight of the aircraft operating the flight.

° The CRCO region corresponds to the 39 Contracting States of the Multilateral Route Charges System (without Ukraine).



SERVICE UNIT TRENDS

More En-route Service Units (TSU) per flight are generated due to longer distances and heavier weights



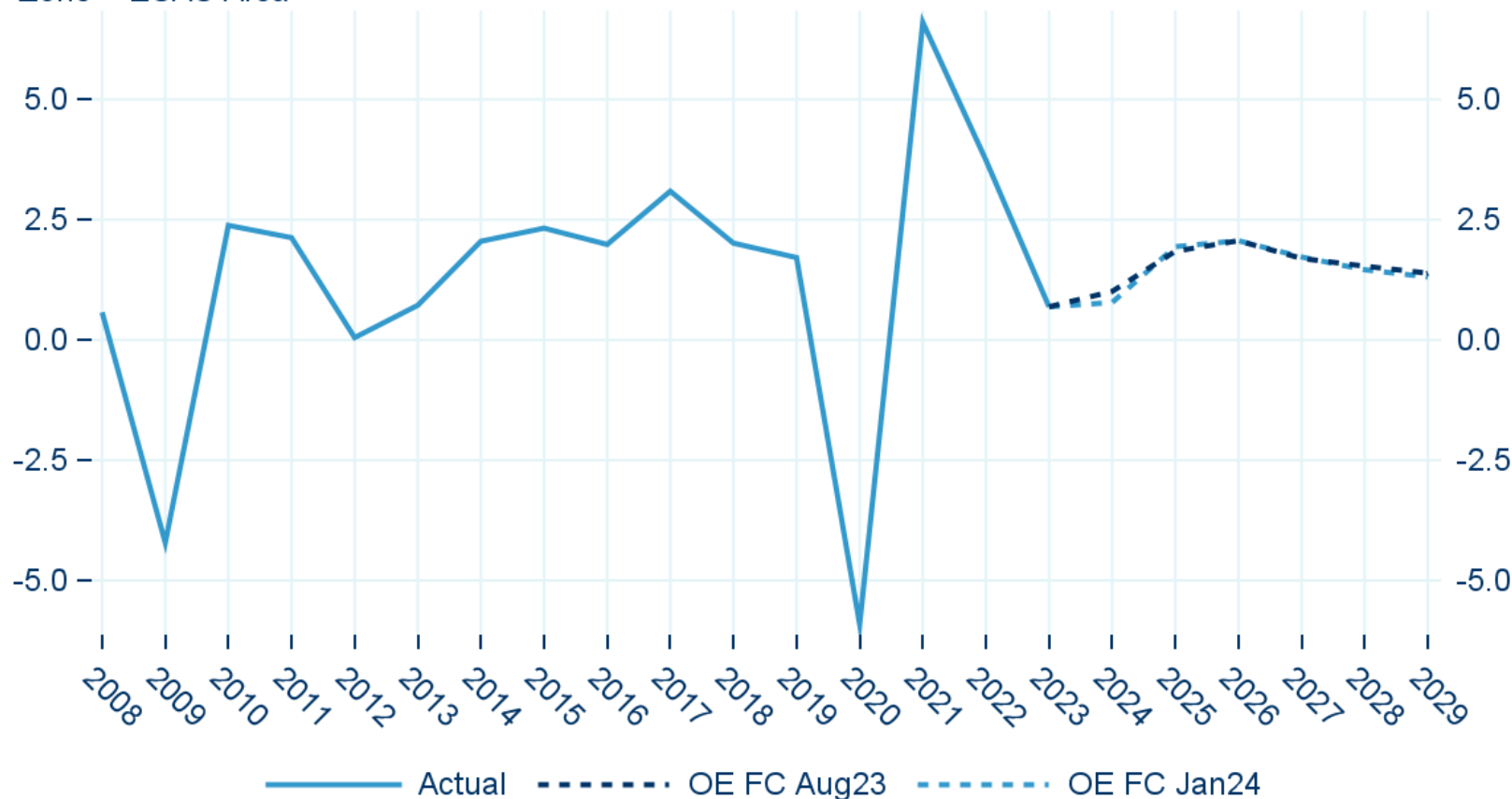


ECONOMIC GROWTH

The GDP baseline forecast for 2024 sees a slight downward revision, remaining unchanged throughout the forecast horizon

GDP Growth (%)

Zone = ECAC Area



Source: Oxford Economics, Release: January 2024

- European economic activity remains **sluggish**.
- A gradual recovery is anticipated by end-2024 by Oxford Economics (OE), thanks to a **return in consumer purchasing power** and **easing financial conditions**.
- A downward revision in 2024 (compared to the OE August 2023 forecast) explained by lower-than-expected **HICP data** and **oil prices**, along with a decline in **economic activity**.
- Uncertainty remains very high, with **risks** skewed to the **downside**.

OTHER FORECAST INPUTS

- Regional
- Business**
- All-cargo
- Other

Geopolitical conflicts are anticipated to continue affecting All-cargo, while the Business Aviation segment is expected to stabilise



Airport capacity constraints have been updated, mainly based on data provided by airports in the Network Manager Airport Corner tool
Assumption of congested airports offloading traffic to neighbouring airports



Various sporting events have been taken into account (EURO2024, Summer Olympics 2024, World Cup 2030, etc.)



Delayed plane deliveries, maintenance on engines and airline fleet changes are all putting pressure on flight growth at the beginning of the forecast horizon



Trends in short-haul traffic for mature markets expect diminishing demand, particularly on domestic routes: competition with alternative transport modes; long-haul network adjustments; evolving travel habits influenced by environmental considerations

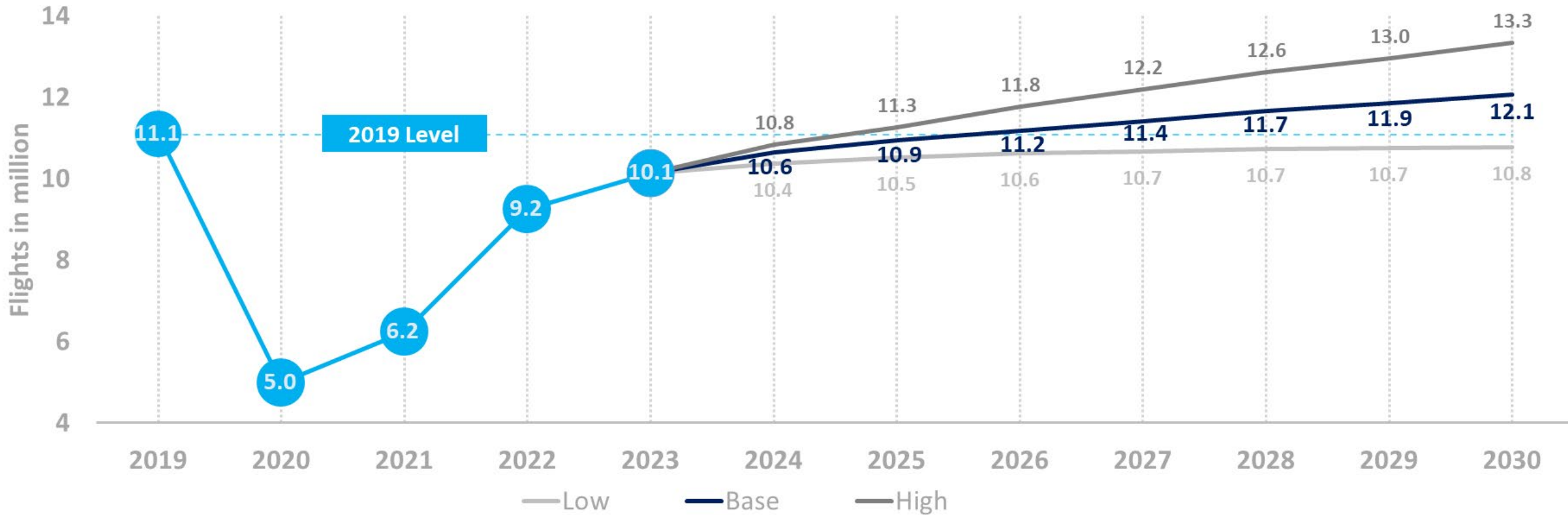


Load factors are expected to increase further



EUROCONTROL STATFOR 7-YEAR FORECAST UPDATE FOR EUROPE* 2024-2030 (Spring 2024)

Actual and future IFR movements



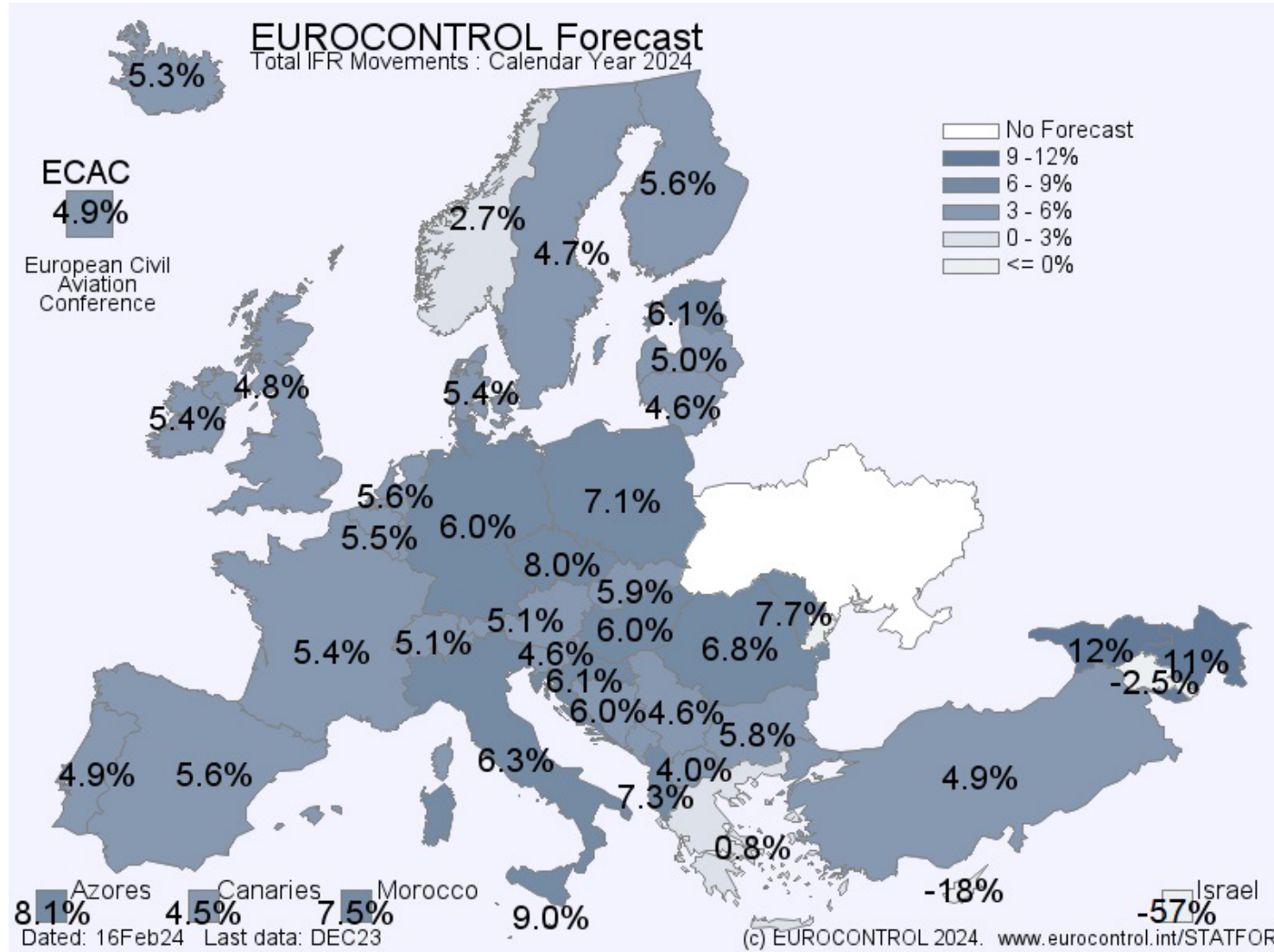
* Europe = ECAC 44 Member States

Source:
EUROCONTROL 7-Year Forecast 2024-2030, Spring 2024



EUROCONTROL STATFOR FLIGHT FORECAST UPDATE FOR 2024

A downwards revision for ECAC to +4.9% (±2.3pp), compared to the Autumn 2023 forecast



In the base scenario, within the projected 4.9% growth for Europe in 2024 are some key local level disparities:

- **South-east Europe** will see robust growth, fuelled by further increased flows to/from Asia and the Middle East, playing a pivotal role in an overall positive area recovery.
- Meanwhile, in **north-east Europe**, the Baltic States face challenges, grappling with a decline in overflights to/from Asia due to the repercussions of the war in Ukraine.
- The conflict in Israel is exerting a significant impact on arrivals/departures in **Israel**, as well as overflight activity for both Israel and Cyprus. The 2024 forecast assumes this situation continues.

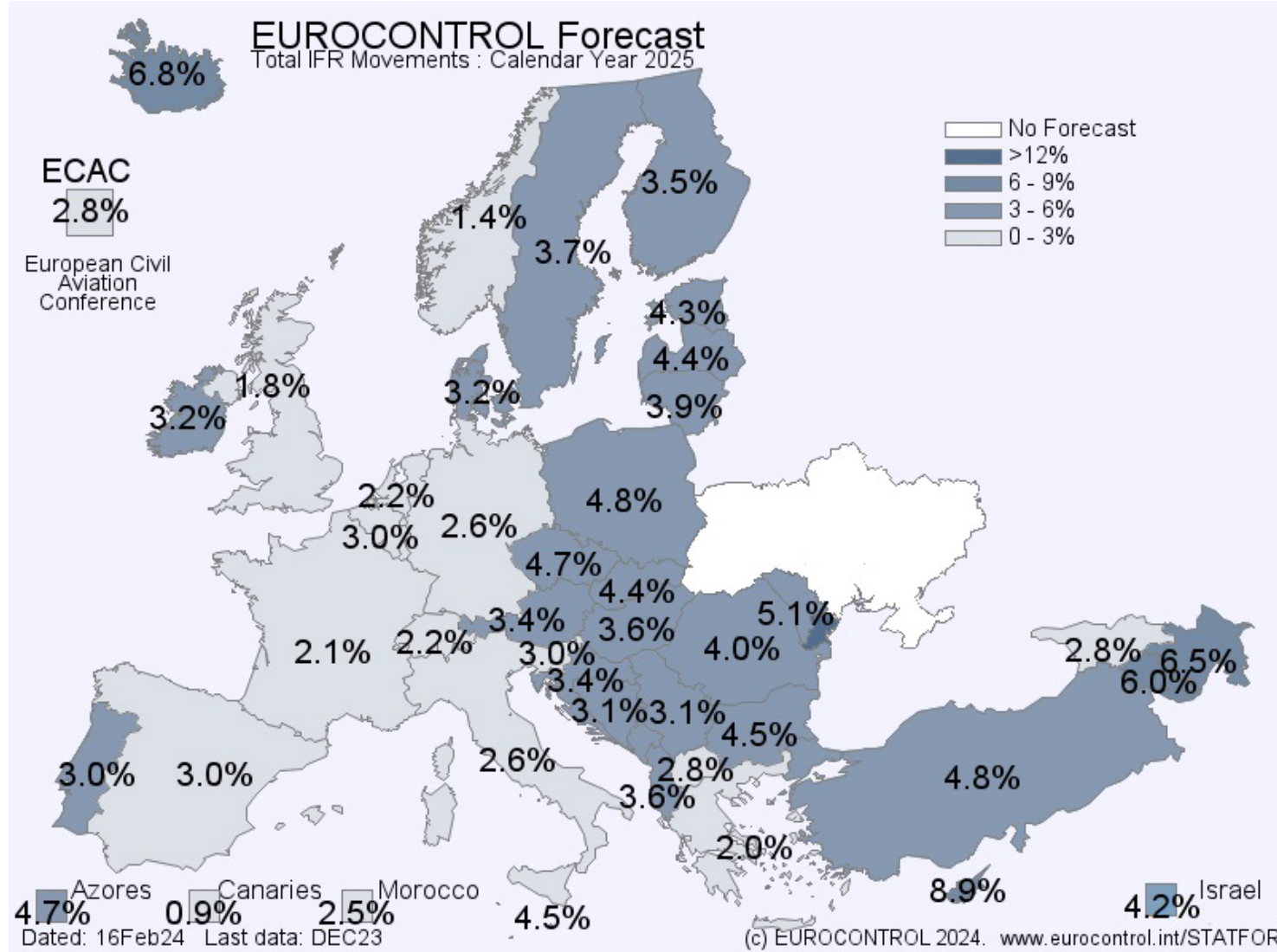
Source: EUROCONTROL 7-Year Forecast 2024-2030, Spring 2024

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EUROCONTROL STATFOR FLIGHT FORECAST UPDATE FOR 2025

ECAC +2.8% (±1.3pp for low-to-high range)



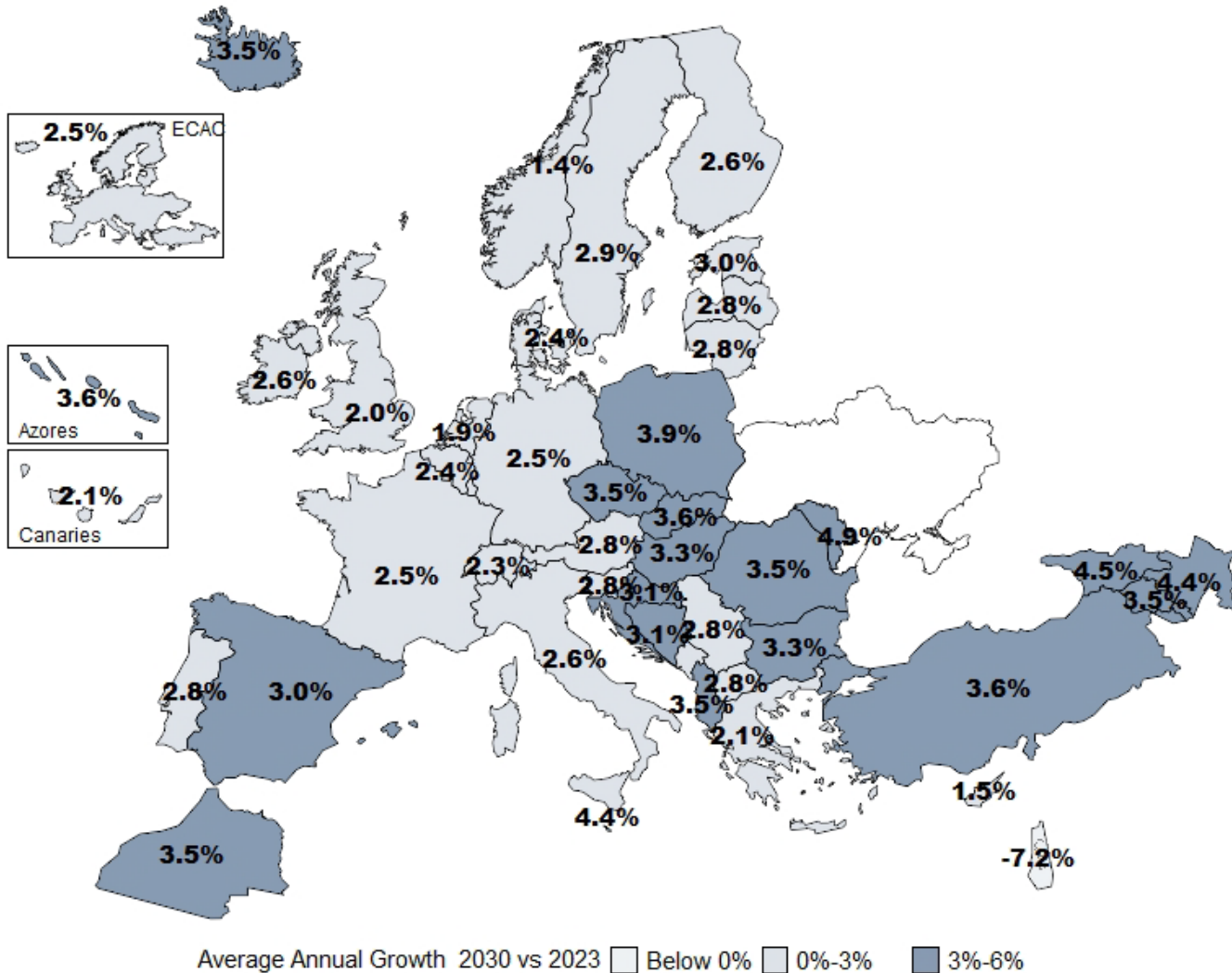
- Europe is forecast to achieve a **flight growth rate of 2.8%** in **2025** (base scenario).
- Additionally, on a monthly basis, we project that the ECAC States will overall attain 2019 traffic levels in terms of flights during Summer 2025.

Source:
EUROCONTROL 7-Year Forecast 2024-2030, Spring 2024



EUROCONTROL STATFOR **FLIGHT** FORECAST UPDATE UP TO 2030

ECAC Average Annual Growth +2.5% (± 1.6 pp for low-to-high range)



- Flight growth in Europe is expected to **average 2.5% per year (± 1.6 pp)** between **2023 and 2030** in the base scenario.
- This growth is however not projected to be uniform.

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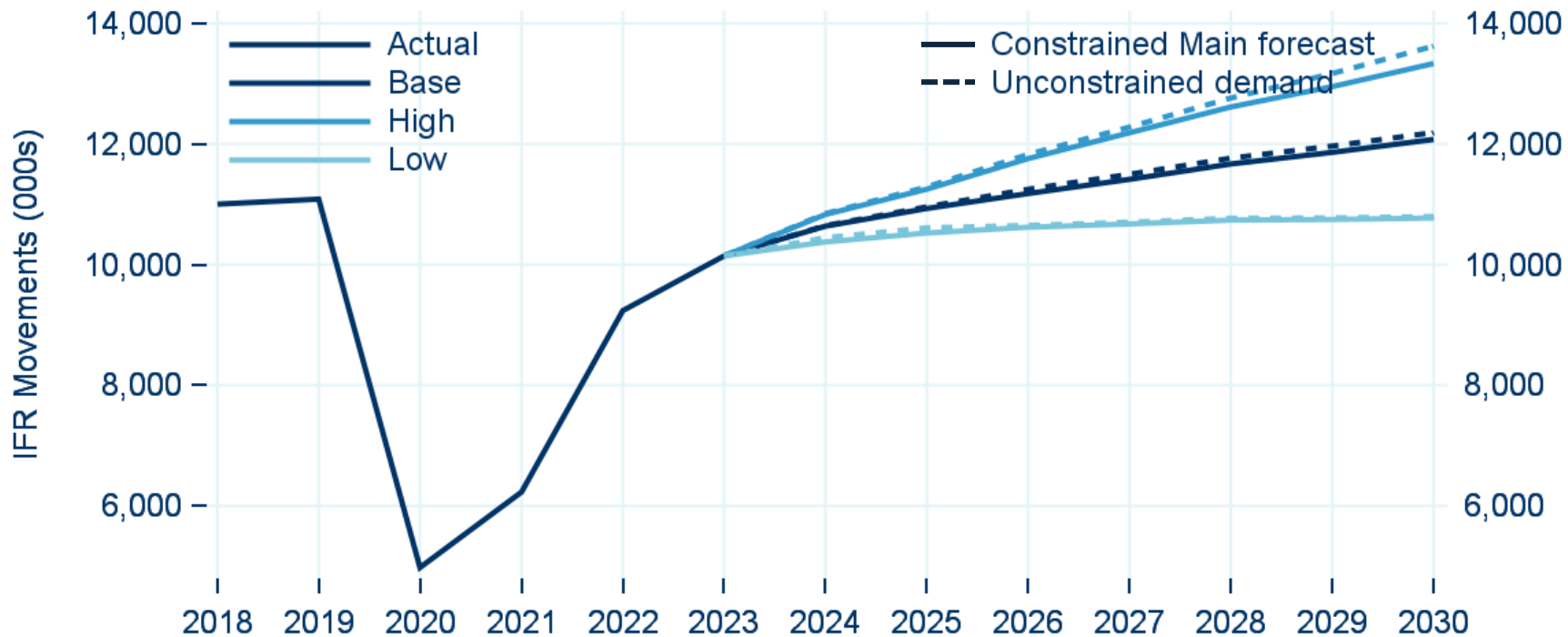
Source: EUROCONTROL 7-Year Forecast 2024-2030, Spring 2024



EUROCONTROL STATFOR **FLIGHT** FORECAST UPDATE

Airport capacity is expected to constrain traffic growth

ECAC - Grand Total



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➤ Approximately 1% of the traffic demand in 2030 (base scenario) may be lost due to **limited airport capacity** at some **major ECAC airports**.

Source:
EUROCONTROL 7-Year Forecast 2024-2030, Spring 2024



EUROCONTROL STATFOR 7-YEAR FORECAST UPDATE

FLIGHT FORECAST (Spring 2024)

Summary of flight forecast for Europe (ECAC)

ECAC*		2019	2020**	2021	2022	2023	2024**	2025	2026	2027	2028**	2029	2030	AAGR 2024-2030	AAGR RP3 2020-2024	AAGR RP4 2025-2029
IFR Flight Movements (Thousands)	High	.	.	.	.	.	10,831	11,251	11,757	12,185	12,613	12,951	13,333	4.0%	-0.5%	3.6%
	Base	11,085	4,979	6,231	9,238	10,144	10,637	10,931	11,178	11,413	11,668	11,861	12,075	2.5%	-0.8%	2.2%
	Low	.	.	.	.	.	10,376	10,524	10,620	10,674	10,738	10,748	10,773	0.9%	-1.3%	0.7%
Annual Growth (%) Compared to previous year.	High	.	.	.	.	.	6.8%	3.9%	4.5%	3.6%	3.5%	2.7%	3.0%	4.0%	-0.5%	3.6%
	Base	0.8%	-55.1%	25.1%	48.3%	9.8%	4.9%	2.8%	2.3%	2.1%	2.2%	1.7%	1.8%	2.5%	-0.8%	2.2%
	Low	.	.	.	.	.	2.3%	1.4%	0.9%	0.5%	0.6%	0.1%	0.2%	0.9%	-1.3%	0.7%
Daily Growth (%) Compared to previous year. Removing leap year effect.	High	.	.	.	.	10%	6.5%	4.2%	4.5%	3.6%	3.2%	3.0%	3.0%	4.0%	-0.5%	3.7%
	Base	0.8%	-55%	25%	48%	10%	4.6%	3.0%	2.3%	2.1%	2.0%	1.9%	1.8%	2.5%	-0.9%	2.3%
	Low	.	.	.	.	10%	2.0%	1.7%	0.9%	0.5%	0.3%	0.4%	0.2%	0.9%	-1.4%	0.8%
Fraction of 2019 (%) Compared to 2019 level.	High	.	.	.	.	.	98%	101%	106%	110%	114%	117%	120%	-	-	-
	Base	100%	45%	56%	83%	92%	96%	99%	101%	103%	105%	107%	109%	-	-	-
	Low	.	.	.	.	.	94%	95%	96%	96%	97%	97%	97%	-	-	-

* ECAC is the European Civil Aviation Conference

** leap year

Source:

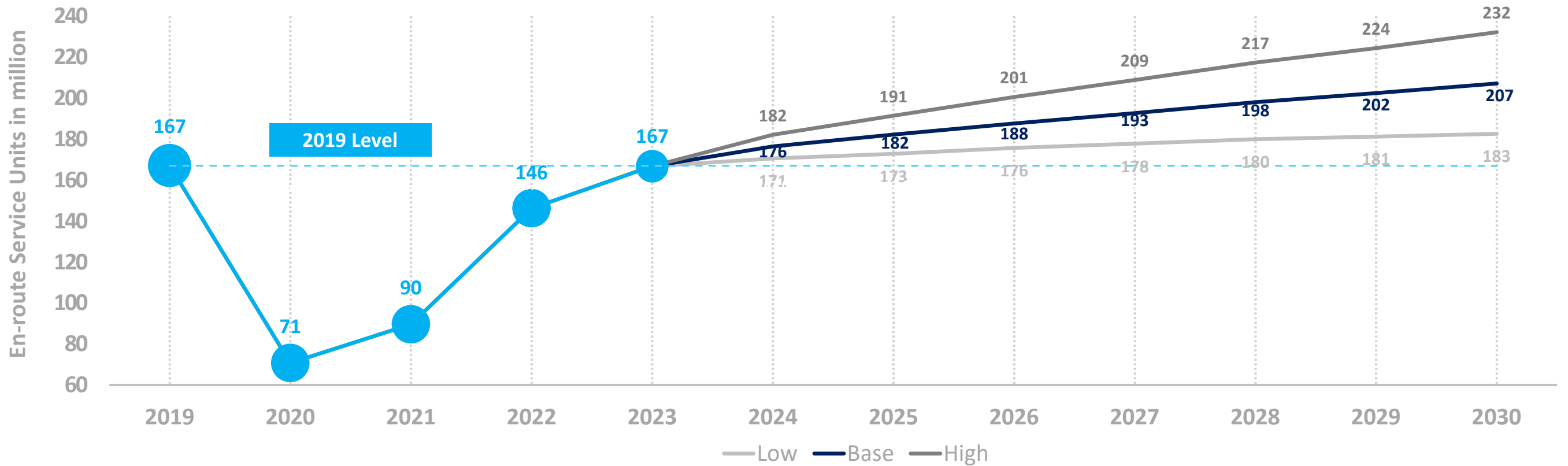
EUROCONTROL 7-Year Forecast 2024-2030, Spring 2024



EUROCONTROL STATFOR 7-YEAR FORECAST UPDATE FOR THE CRCO REGION° 2024-2030 (SPRING 2024)

Actual and future **En-Route Service Units**

➤ TSUs are expected to grow from nearly 100% of 2019 levels in 2023 to **124%** in the base scenario in 2030.



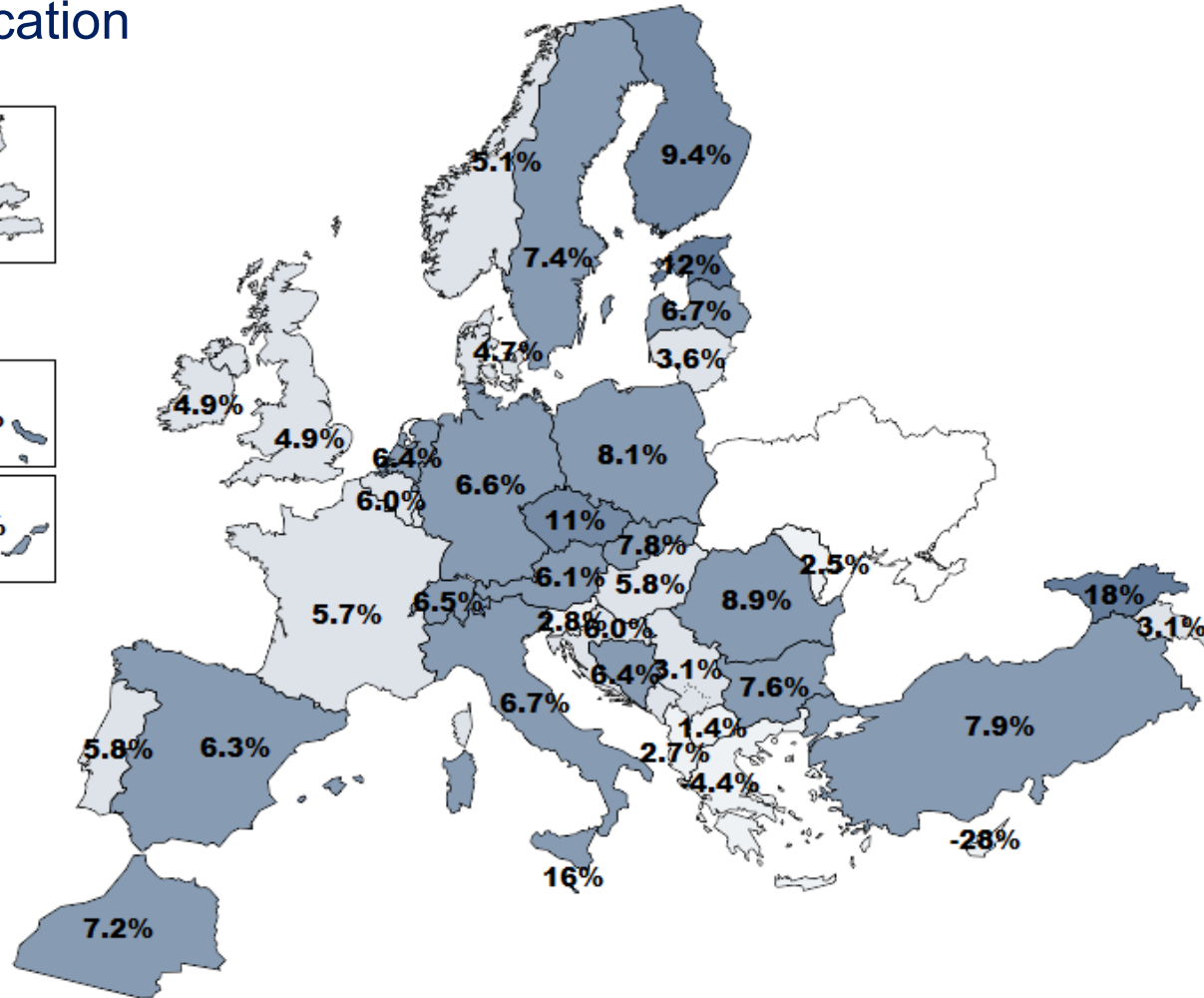
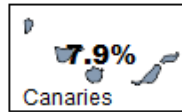
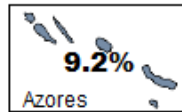
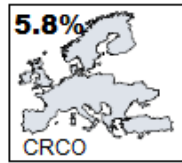
° The CRCO Region corresponds to the 39 Contracting States of the Multilateral Route Charges System (without Ukraine)

Source: EUROCONTROL 7-Year Forecast 2024-2030, Spring 2024



EUROCONTROL STATFOR TSU FORECAST UPDATE FOR 2024

A downwards revision for the CRCO° region to +5.8% (±3.5pp), compared to the Autumn 2023 publication



Annual Growth 2024 Below 3% 3%-6% 6%-9% 9%-12% Above 12%

- In 2024, TSU in the CRCO region will reach **176.4 million** in the base scenario, **4.4 million TSU below** the Autumn 2023 forecast.
- The downward revision is mainly driven by flights.

° The CRCO region corresponds to the 39 Contracting States of the Multilateral Route Charges System (without Ukraine).

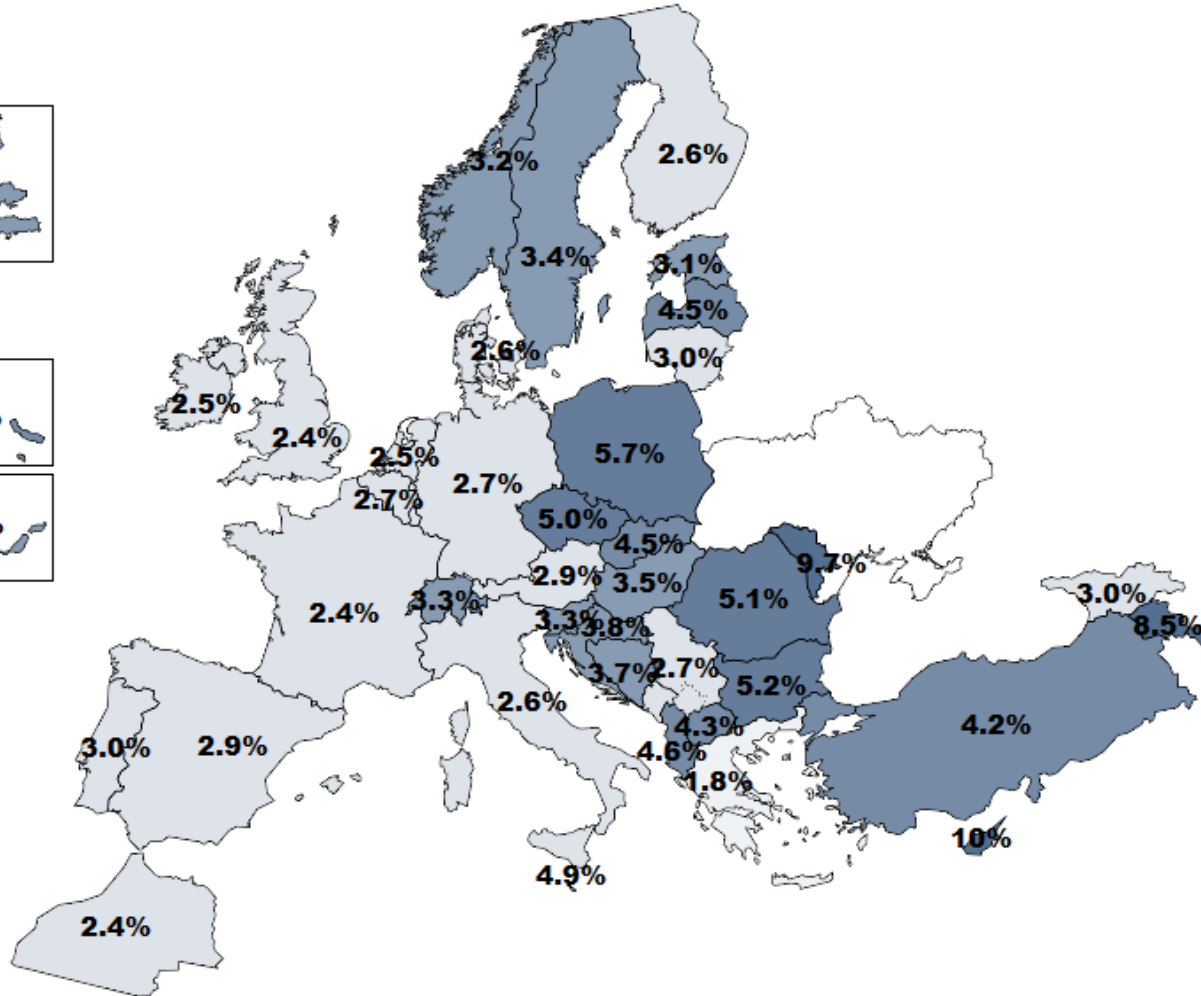
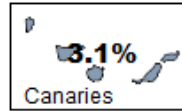
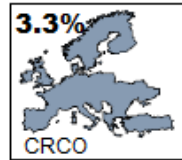
Source:
EUROCONTROL 7-Year Forecast 2024-2030, Spring 2024

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EUROCONTROL STATFOR TSU FORECAST UPDATE FOR 2025

CRCO° region at +3.3% (±1.9pp)



Annual Growth 2025 Below 2% 2%-3% 3%-4% 4%-5% 5%-6% Above 7%

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- In 2025, TSU in the CRCO region will reach **182.2 million** in the base scenario, **2.7 million TSU below** the Autumn 2023 forecast.
- Growth rates will be back to the levels observed in pre-COVID-19 forecasts.
- Beyond 2025, TSU growth is expected to average **2.8%** in the base forecast over the RP4 period 2025-2029 (vs **2.2%** for flights).
- Stronger average growth in the medium term than in the previous forecast will result in **202.4 million TSU** in the base scenario for 2029, **1.5 million TSU above** the Autumn 2023 forecast.

° The CRCO region corresponds to the 39 Contracting States of the Multilateral Route Charges System (without Ukraine).

Source:
EUROCONTROL 7-Year Forecast 2024-2030, Spring 2024



EUROCONTROL STATFOR 7-YEAR FORECAST UPDATE

EN ROUTE SERVICE UNITS FORECAST (Spring 2024)

Summary of TSU forecast

CRCO ^o		2019	2020**	2021	2022	2023	2024*	2025	2026	2027	2028*	2029	2030	AAGR 2024-2030	AAGR RP3 2020-2024	AAGR RP4 2025-2029
En-route Service Units (Thousands)	High	.	.	.	.	.	182,110	191,368	200,508	208,791	217,280	224,368	232,145	4.8%	1.7%	4.3%
	Base	167,000	70,828	89,680	146,221	166,751	176,413	182,231	187,590	192,634	198,008	202,383	207,117	3.1%	1.1%	2.8%
	Low	.	.	.	.	.	170,566	172,799	175,684	177,766	179,931	181,176	182,585	1.3%	0.4%	1.2%
Annual Growth (%) <small>Compared to previous year.</small>	High	.	.	.	.	.	9.2%	5.1%	4.8%	4.1%	4.1%	3.3%	3.5%	4.8%	1.7%	4.3%
	Base	6.1%	3%	27%	63%	14%	5.8%	3.3%	2.9%	2.7%	2.8%	2.2%	2.3%	3.1%	1.1%	2.8%
	Low	.	.	.	.	.	2.3%	1.3%	1.7%	1.2%	1.2%	0.7%	0.8%	1.3%	0.4%	1.2%
Daily Growth (%) <small>Compared to previous year. Removing leap year effect.</small>	High	.	.	.	.	.	8.9%	5.4%	4.8%	4.1%	3.8%	3.5%	3.5%	4.8%	1.7%	4.3%
	Base	2.8%	-58%	27%	63%	14%	5.5%	3.6%	2.9%	2.7%	2.5%	2.5%	2.3%	3.1%	1.0%	2.8%
	Low	.	.	.	.	.	2.0%	1.6%	1.7%	1.2%	0.9%	1.0%	0.8%	1.3%	0.4%	1.3%
Fraction of 2019 (%) <small>Compared to 2019 level.</small>	High	.	.	.	.	.	109%	115%	120%	125%	130%	134%	139%	.	.	.
	Base	100%	42%	54%	88%	100%	106%	109%	112%	115%	119%	121%	124%	.	.	.
	Low	.	.	.	.	.	102%	103%	105%	106%	108%	108%	109%	.	.	.
SES-RP3/RP4 ^{oo}		2019	2020**	2021	2022	2023	2024*	2025	2026	2027	2028*	2029	2030	AAGR 2024-2030	AAGR RP3 2020-2024	AAGR RP4 2025-2029
En-route Service Units (Thousands)	High	.	.	.	.	.	133,209	139,807	146,516	152,501	158,531	163,463	168,818	4.7%	1.2%	4.2%
	Base	125,206	52,595	66,991	108,508	122,491	129,055	133,161	137,050	140,686	144,505	147,586	150,870	3.0%	0.6%	2.7%
	Low	.	.	.	.	.	124,838	126,385	128,434	129,912	131,404	132,225	133,116	1.2%	-0.1%	1.2%
Annual Growth (%) <small>Compared to previous year.</small>	High	.	.	.	.	.	8.8%	5.0%	4.8%	4.1%	4.0%	3.1%	3.3%	4.7%	1.2%	4.2%
	Base	6.1%	3%	27%	62%	13%	5.4%	3.2%	2.9%	2.7%	2.7%	2.1%	2.2%	3.0%	0.6%	2.7%
	Low	.	.	.	.	.	1.9%	1.2%	1.6%	1.2%	1.1%	0.6%	0.7%	1.2%	-0.1%	1.2%
Daily Growth (%) <small>Compared to previous year. Removing leap year effect.</small>	High	.	.	.	.	.	8.5%	5.2%	4.8%	4.1%	3.7%	3.4%	3.3%	4.7%	1.2%	4.2%
	Base	2.8%	-58%	28%	62%	13%	5.1%	3.5%	2.9%	2.7%	2.4%	2.4%	2.2%	3.0%	0.6%	2.8%
	Low	.	.	.	.	.	1.6%	1.5%	1.6%	1.2%	0.9%	0.9%	0.7%	1.2%	-0.1%	1.2%
Fraction of 2019 (%) <small>Compared to 2019 level.</small>	High	.	.	.	.	.	106%	112%	117%	122%	127%	131%	135%	.	.	.
	Base	100%	42%	54%	87%	98%	103%	106%	109%	112%	115%	118%	120%	.	.	.
	Low	.	.	.	.	.	100%	101%	103%	104%	105%	106%	106%	.	.	.

^o CRCO corresponds to the 39 Contracting States of the Multilateral Route Charges System (without Ukraine).

^{oo} SES-RP3 corresponds to the 29 States involved in the EU-wide performance target setting for the third period.

* leap year

Source:

EUROCONTROL 7-Year Forecast 2024-2030, Spring 2024

ADDITIONAL RISKS NOT INCLUDED IN THE FORECAST



Changing inflation and **greater uncertainty** triggered by existing or new conflicts are key risks. A longer period of conflicts could translate into a bigger hit to the **global economy**. The current forecast includes different economic forecasts, but a further deterioration in the economic situation and increased **geopolitical tensions** are a downside risk.



The **oil price outlook** remains very uncertain, and the lack of available refining capacity is a downside risk for the airline industry.



Further environmental pressures: additional measures to reduce aviation emissions are a downside risk to traffic growth.



Future **airspace and network changes** (e.g. unexpected closures/reopenings, new routes) and **airlines changing their choice of routes** are not modelled in the forecast. It is not possible to predict when hostilities in Ukraine will cease and its airspace will reopen. This forecast has therefore been prepared using the current status as a baseline*. This should of course not be interpreted as a prediction on the part of EUROCONTROL of any future evolution in the hostilities in Ukraine.



Increased need for **airspace by the military**.



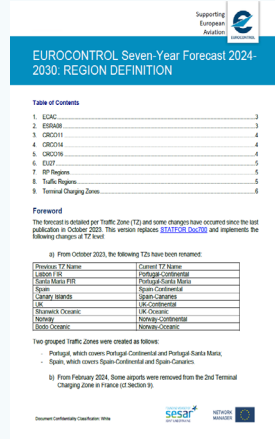
Natural disasters, wars, terrorist attacks, bans of one country on another, etc.



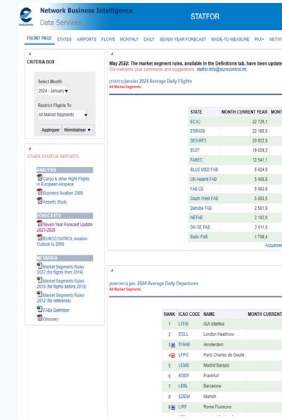
Cancellations due to strikes as well as shortage of staff in airports and airlines are also downside risks.

* The routes used in the forecast are those flown in the period January 2023-December 2023.

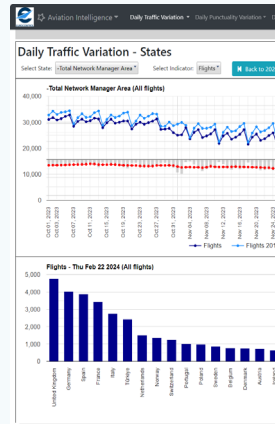
USEFUL LINKS



A presentation of the geographical definitions can be found in [Annex - Traffic Region Definitions](#)



Connect to the [STATFOR Interactive Dashboard](#)



Connect to the [Aviation Intelligence Dashboard](#)

The forecast per state can be found in [Annex - Detailed Traffic Forecast](#)

For further info, please contact the forecasting team: statfor.info@eurocontrol.int

To further assist you in your analysis, EUROCONTROL provides the following additional information:

1. EUROCONTROL STATFOR Interactive Dashboard

www.eurocontrol.int/dashboard/statfor-interactive-dashboard

The STATFOR interactive dashboard (SID) is a unique source of statistics on flights in Europe. Thanks to its segmented approach, users benefit from a customisable and flexible interface; early access to statistics – updated and made available in the first week of each month; a wide coverage of statistics; and synchronisation with other STATFOR products.



2. EUROCONTROL Daily Traffic Variation Dashboard

www.eurocontrol.int/Economics/

This dashboard provides traffic for Day+1 for all European States; for the largest airports; for each Area Control Centre (ACC); and for the largest airline operators.



3. EUROCONTROL “Our Data” Portal

www.eurocontrol.int/our-data/

This webpage provides an overview of key charts and publications related to European aviation performance.



For more information, please contact statfor.info@eurocontrol.int



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