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EUROCONTROL FORECAST UPDATE 2024-2030

Autumn 2024

CONSORTIUM COORDINATOR sesar DEPLOYMENT MANAGER

FOUNDING MEMBER sesar JOINT UNDERTAKING

NETWORK MANAGER

v2 with updated flight forecast maps

Summary

- This **Seven-Year Forecast (Autumn 2024)** builds upon the February 2024 publication and incorporates the latest flight trends and route patterns (including summer 2024). It also includes a partial update of forecast inputs, such as the GDP forecast.
- For 2024, the expected number of **flights in ECAC is 10.7 million**, reflecting **growth of 5.1%** (±0.7pp) compared to 2023 (96% of 2019 levels). This is broadly in line with the February 2024 traffic forecast at network level. Many States, particularly in the Southeast, are experiencing significantly higher recovery rates.
- For 2025, **traffic is expected to grow by 3.7%** (±1.7pp) reaching 11.1 million flights. This reflects the 2024 outturn, an improved economic outlook and optimistic airline schedules for winter 2024-2025. Overall, traffic should return to pre-pandemic levels but with notable local variation.
- Beyond 2025, average annual flight growth is expected to be +2.0% (±1.5pp), reaching **over 12 million flights by 2030** in the base scenario. These growth projections remain stable compared to the previous forecast.
- For the States involved in the **SES Performance Scheme**, flight growth is expected to average 2.3% annually (±1.5pp) between 2025 and 2029 (RP4), representing a **slight upward revision** from the February 2024 forecast.
- Users of the forecast are strongly advised to consider the forecast range (low to high) as a tool to manage business risks. This forecast is subject to various uncertainties, including potential geopolitical disruptions, economic shocks, and ongoing challenges in the aviation industry. The geopolitical events that occurred in October 2024 in the Middle-East were not reflected in this forecast.

* ECAC is the European Civil Aviation Conference

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This 7-Year Forecast Update covers the 2024-2030 period

- This Autumn 2024 forecast takes into account the following updated inputs:

Traffic trends up to September 2024
European flight numbers have continued to recover steadily, with traffic volumes showing significant strength over the summer. Several States have already surpassed their 2019 traffic levels. However, the network remains heavily impacted by the ongoing Russian invasion of Ukraine, which continues to disrupt airspace usage and reroute traffic flows.

Partial update of the forecast inputs
Revisions to the economic forecast from Oxford Economics (August 2024), alongside considerations for upcoming events and adjustments to airport capacities, have been incorporated. All other inputs remain consistent with those used in the February 2024 publication.

Routings
The routing patterns from November 2023 until August 2024, combined with recent trends observed in State overflights, are used as a basis for forecasting future overflight activity.

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. However, the geopolitical events occurred in October 2024 in the Middle-East were not reflected in this forecast. This should not be interpreted as a prediction on the part of EUROCONTROL of any future evolution of these restrictions.

- This forecast replaces the February 2024 forecast.

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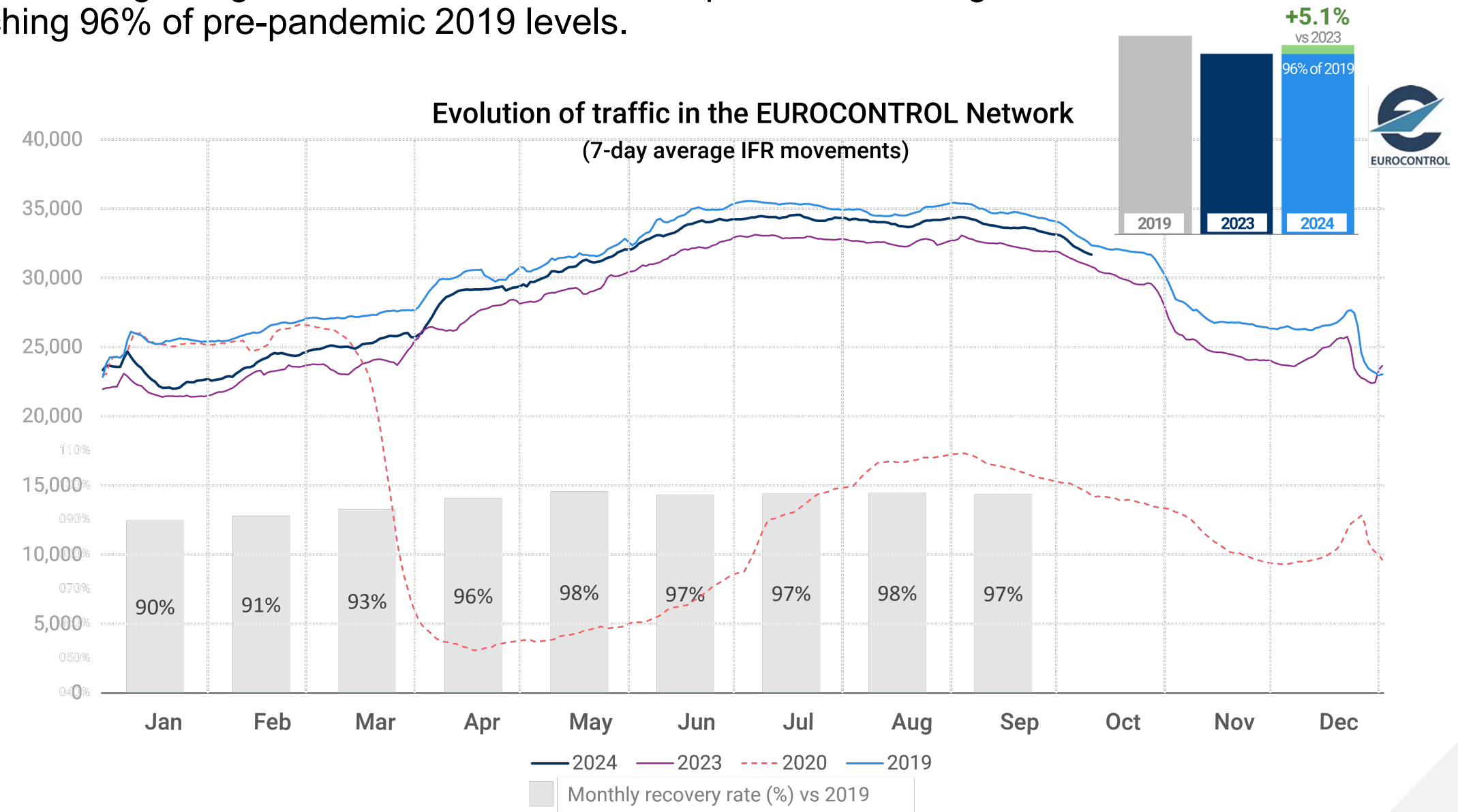
Flight Trends

Since the beginning of 2024, IFR movements experienced 5.1% growth, reaching 96% of pre-pandemic 2019 levels.



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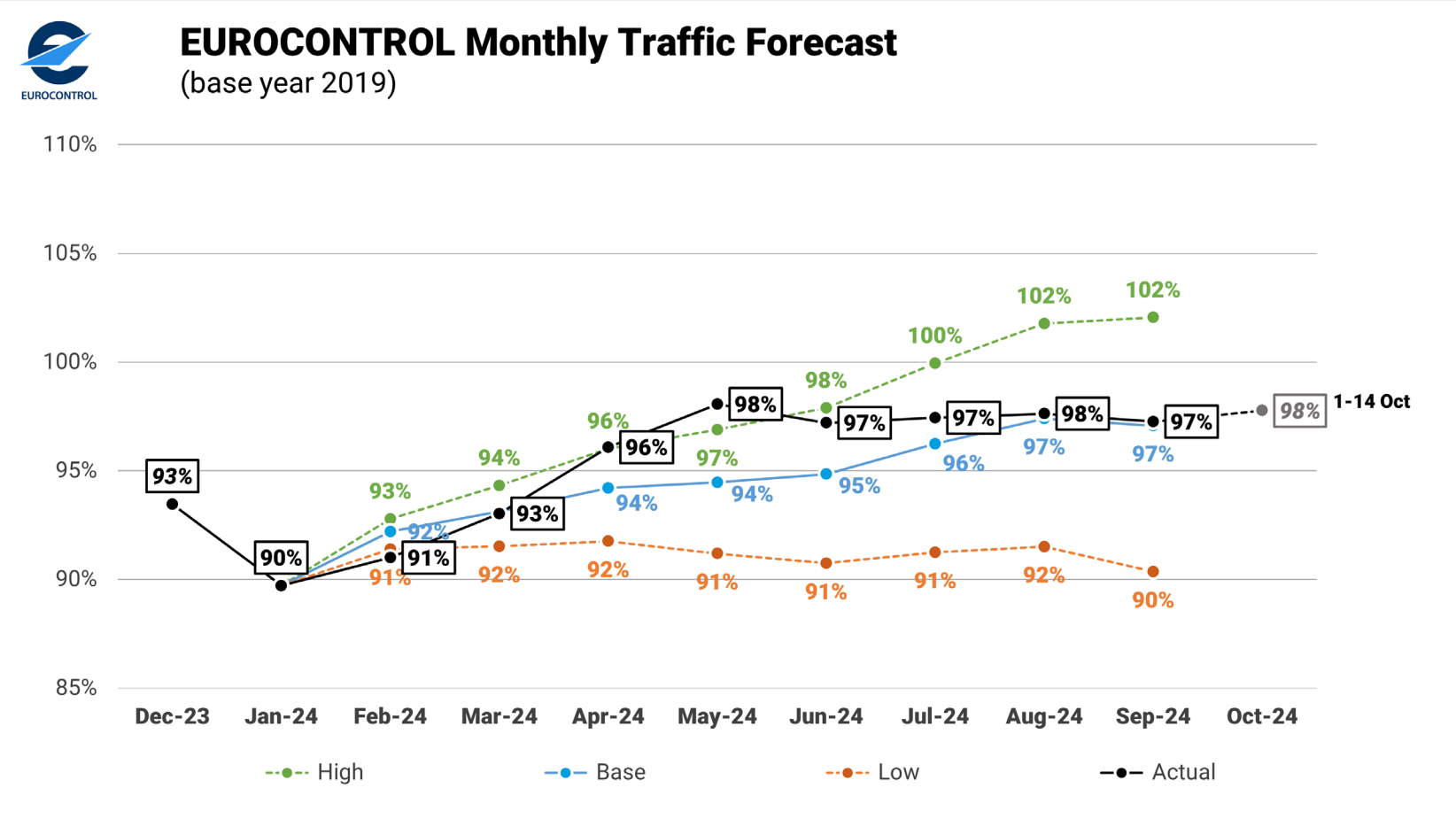
Flight Trends

During the start of summer 2024, actual traffic levels were stronger than expected, aligning more closely with our high forecast from February 2024.



- Between April and June, actual traffic figures were higher than the base scenario of the February 2024 forecast.
- Increased demand for travel, particularly for leisure and tourism, has led to higher-than-expected flight numbers across Europe, especially in Southern and Eastern regions.
- From July onwards, actual traffic figures were in line with the base scenario of the February 2024 forecast.

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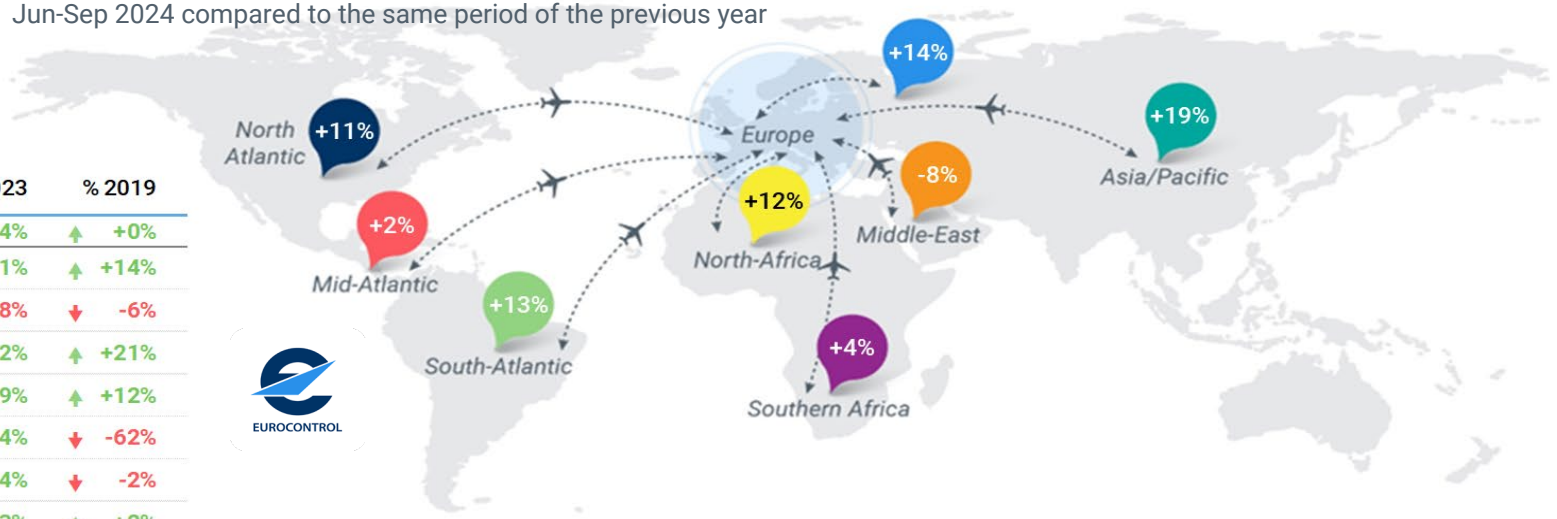
Extra European flows

Summer traffic recovered to 2019 levels in the main flows except those impacted by the geopolitical conflicts

Traffic flow changes

Jun-Sep 2024 compared to the same period of the previous year



Region	Average daily flights	% 2023	% 2019
Intra-Europe	26,444	+4%	+0%
Europe ↔ North Atlantic	1,632	+11%	+14%
Europe ↔ Middle-East	1,527	-8%	-6%
Europe ↔ North-Africa	1,400	+12%	+21%
Europe ↔ Asia/Pacific	918	+19%	+12%
Europe ↔ Other Europe	498	+14%	-62%
Europe ↔ Southern Africa	300	+4%	-2%
Europe ↔ South-Atlantic	199	+13%	+2%
Europe ↔ Mid-Atlantic	166	+2%	-0%
Non Intra-Europe	6,639	+7%	-5%

- Flows to Asia, North-Atlantic and North-Africa recorded strong growth vs. same period in 2023 and were well above 2019 levels.
- Other-Europe (includes Russian Federation) and the Middle-East (includes Israel) flows constrained by the on-going conflicts.
- South-and Mid-Atlantic recovered; Southern Africa were close to 2019.

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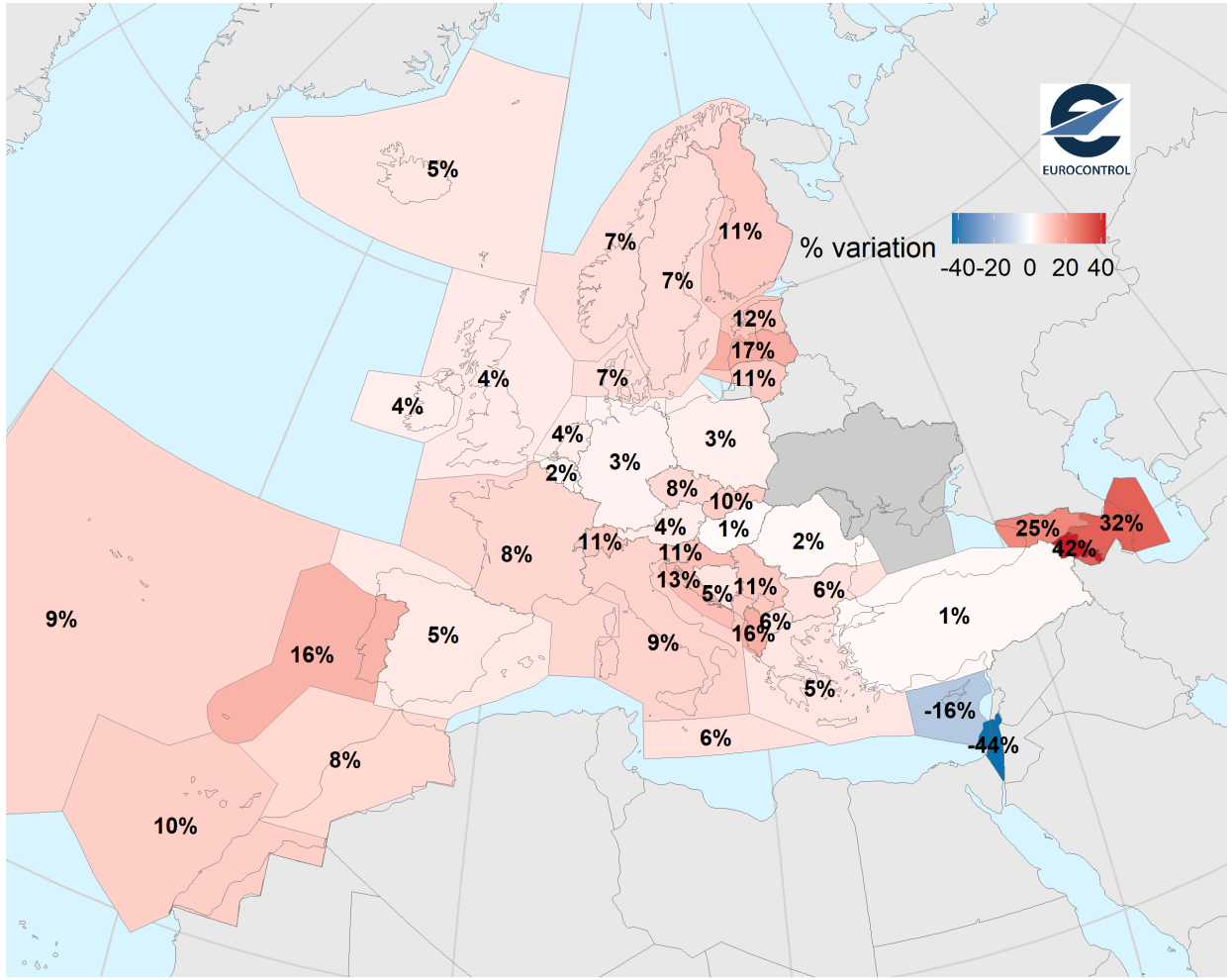
Overflight Trends

On-going conflicts and constrained airspaces impacting the routes

Traffic Zone (based on FIR) % Overflights variation Jun-Sep 2024 vs Jun-Sep 2023



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

- Southeast States with additional traffic on flows to Asia and Middle-East, impacted by airspace closures and flight bans since the beginning of the **conflict in Ukraine**. Russian traffic bringing increase in overflights in the Baltic region.
- The **conflict in Israel and Gaza** led to a volatile situation in terms of airspace and routes availability in the region throughout the last 12 months.
- Overflights in the South Caucasus States have been particularly affected by the above-mentioned events.
- Airline route choices influenced by **constrained airspaces in central Europe** throughout the summer. This led to a shift to the west of the Southeast bound flows, with notable increases in Italy, Switzerland and western Balkan States.

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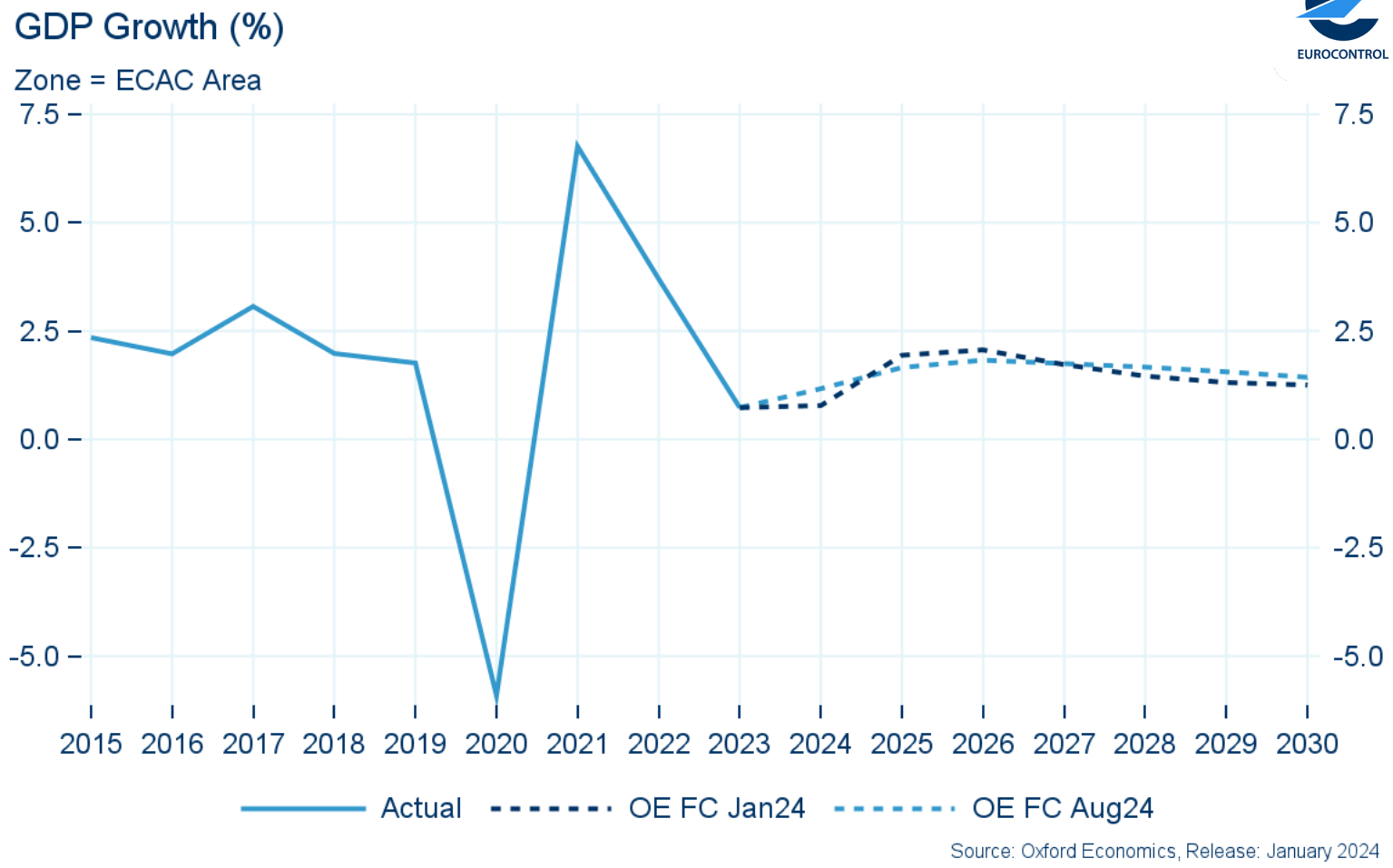
Economic Growth

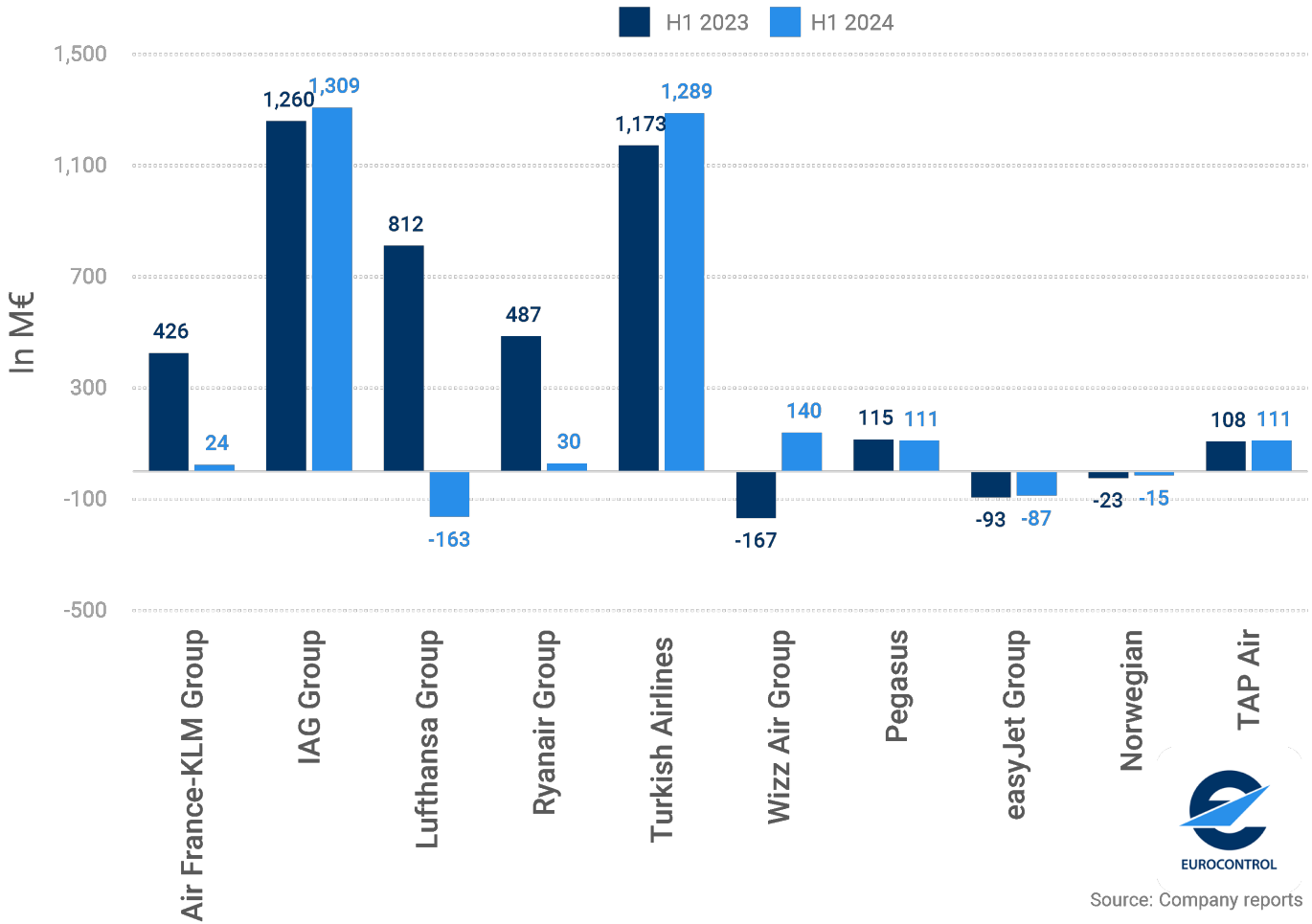
Upward revision of the flight forecast driven by stronger economic growth and higher demand in 2024.



- The **upward revision in the GDP forecast for 2024** reflects a more positive economic environment than initially expected. This improvement supports higher consumer spending, including for air travel, driving the revision of the flight forecast upwards.
- Stronger-than-expected economic recovery, especially in **South and East Europe**, has resulted in increased air traffic demand.
- While the 2024 GDP forecast has been revised significantly upwards, **projections for 2025-2030 remain stable** compared to previous estimates. However, the **high level of uncertainty** surrounding inflation, fuel prices, and global economic conditions could still impact future growth.

Operating results

Despite operational challenges, airlines posted strong results in H1 2024, justifying upward flight forecast revisions through the horizon.



Source: Company reports

- **Strong recovery for most airlines in H1 2024:** Major airlines such as IAG Group and Turkish Airlines posted strong operating results in the first half of 2024, significantly surpassing their 2023 performance. This upward trend in profits indicates strong market demand and the resilience of the industry despite ongoing challenges.
- **Geopolitical events** are affecting airlines' competitiveness on certain flows, particularly to Asia, where reroutings have increased operational costs.
- **Fleet** : Issues with Pratt & Whitney (P&W) engines have caused airlines to ground part of their fleet for mandatory maintenance. This, coupled with delays in aircraft deliveries, is slowing down some airlines' expansion plans early in the forecast horizon.
- **Optimistic airline schedules:** Despite the above constraints, airlines remain highly optimistic, as seen in their winter schedules (INNOVATA October 2024), supporting the upward revision of flight forecasts for the coming months.

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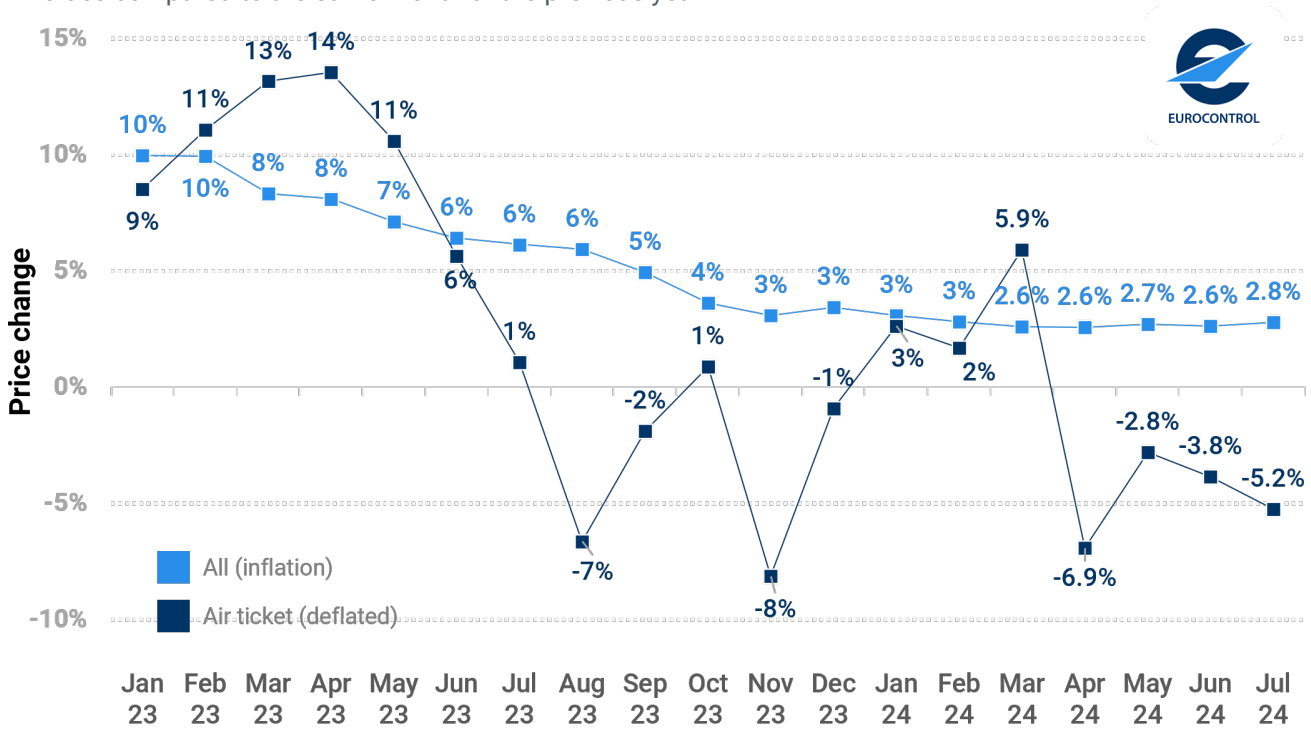
Ticket prices

Price reductions in 2024 have driven stronger-than-expected demand, leading to upward revisions of the forecast.

Price change per month (EU27)

Values compared to the same month of the previous year

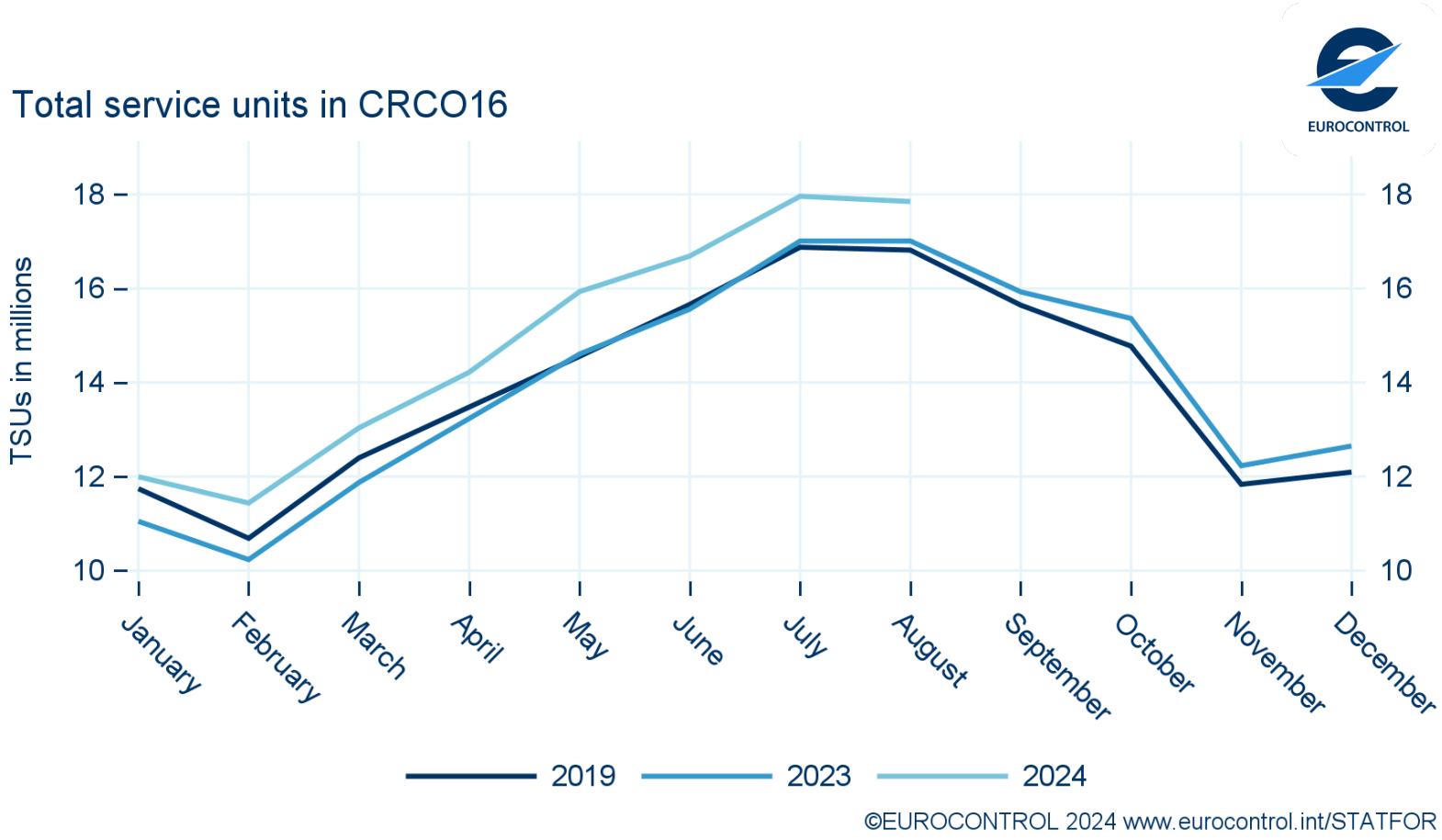


Source: EUROSTAT

- **Price decreases in 2024 driving higher demand:** the deflated air ticket prices in 2024 show a significant drop, with a notable -6.9% in April and -5.2% in July compared to earlier peaks in 2023.
- The **stronger demand** for air travel in 2024, allowed airlines to mitigate the impact of fleet constraints and other disruptions.
- **Price stability despite decreases:** Although prices declined sharply, the deflated ticket index remained relatively stable and above 2019 levels, supporting continued air traffic growth.

En Route Service Units Trends

They are mainly driven by the higher-than-expected flight trends and stand between the Base and High forecast of February 2024



- From January to August Actual Total en-route service units stand close to **106%** of 2019 figures
- This represents a growth of **7.7%** compared to 2023 values.
- However, monthly growth figures have started to weaken since June and stand at **5%** of 2023 for August.

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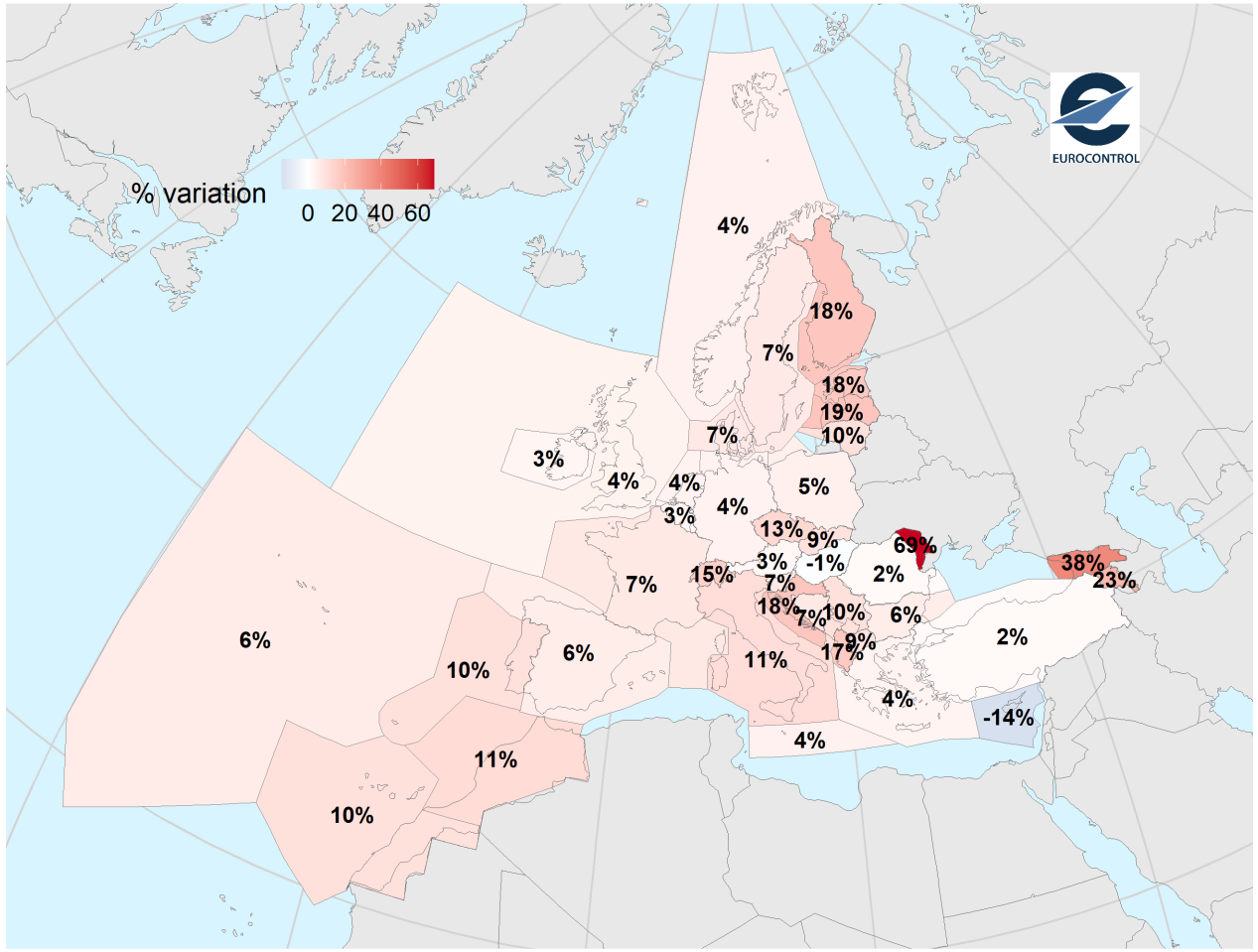
En Route Service Units Trends

Traffic Zone (based on FIR) % Service Units variation Jun-Aug2024 vs Jun-Aug2023



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- The **en-route Service Units growth** between June and August reflects the **growth of overflights**, with differences linked to changes in the distance flown and weights of those overflights.
- The route choices influenced by constrained airspaces in central Europe and the volatile situation associated with the conflict in Israel and Gaza have led to a **discrepancy in Southeast Europe** with stronger growth in its Western part (e.g Croatia, Italy, Albania), and lower growth in the East (e.g Hungary, Turkey, Bulgaria);
- Airspace closure and flight bans due to the conflict in Ukraine are still impacting several flows. Russian traffic to/from Kaliningrad brings an **increase in overflights in the Baltic region** that is reflected in a strong growth of en-route service units. The **increase of overflights** in the South Caucasus States had an impact on the en-route Service Units too.

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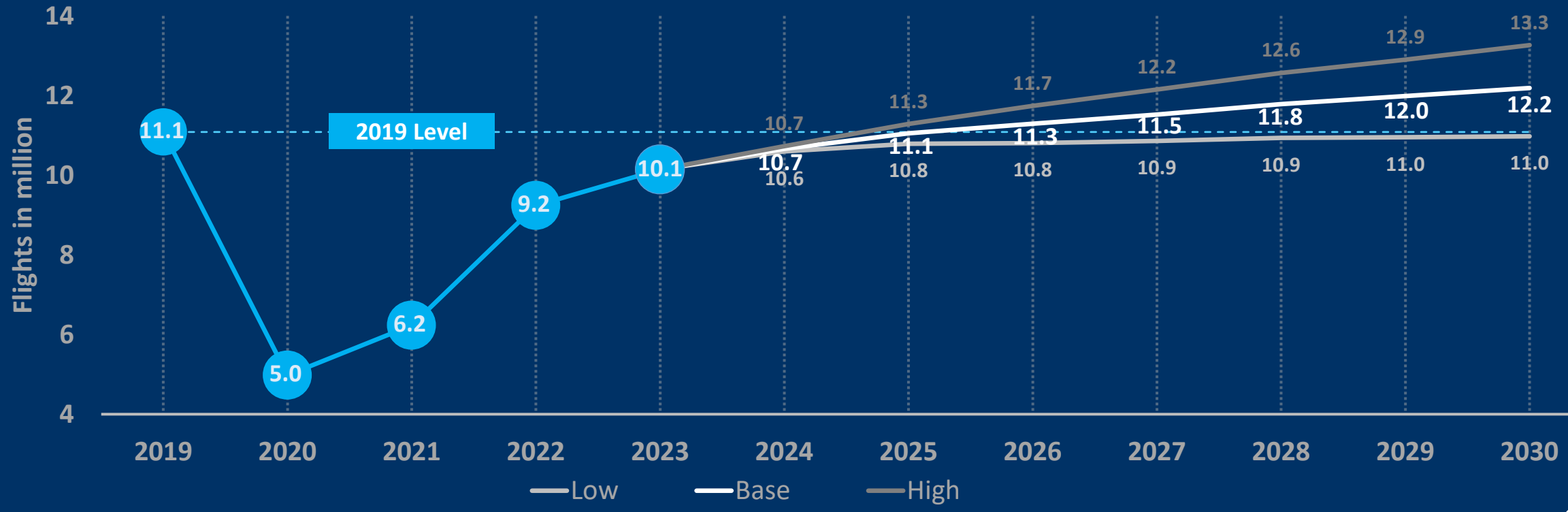
EUROCONTROL 7-Year Forecast Update for Europe* 2024-2030 (Autumn 2024)

Actual and future IFR movements



* Europe = ECAC 44 Member States

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

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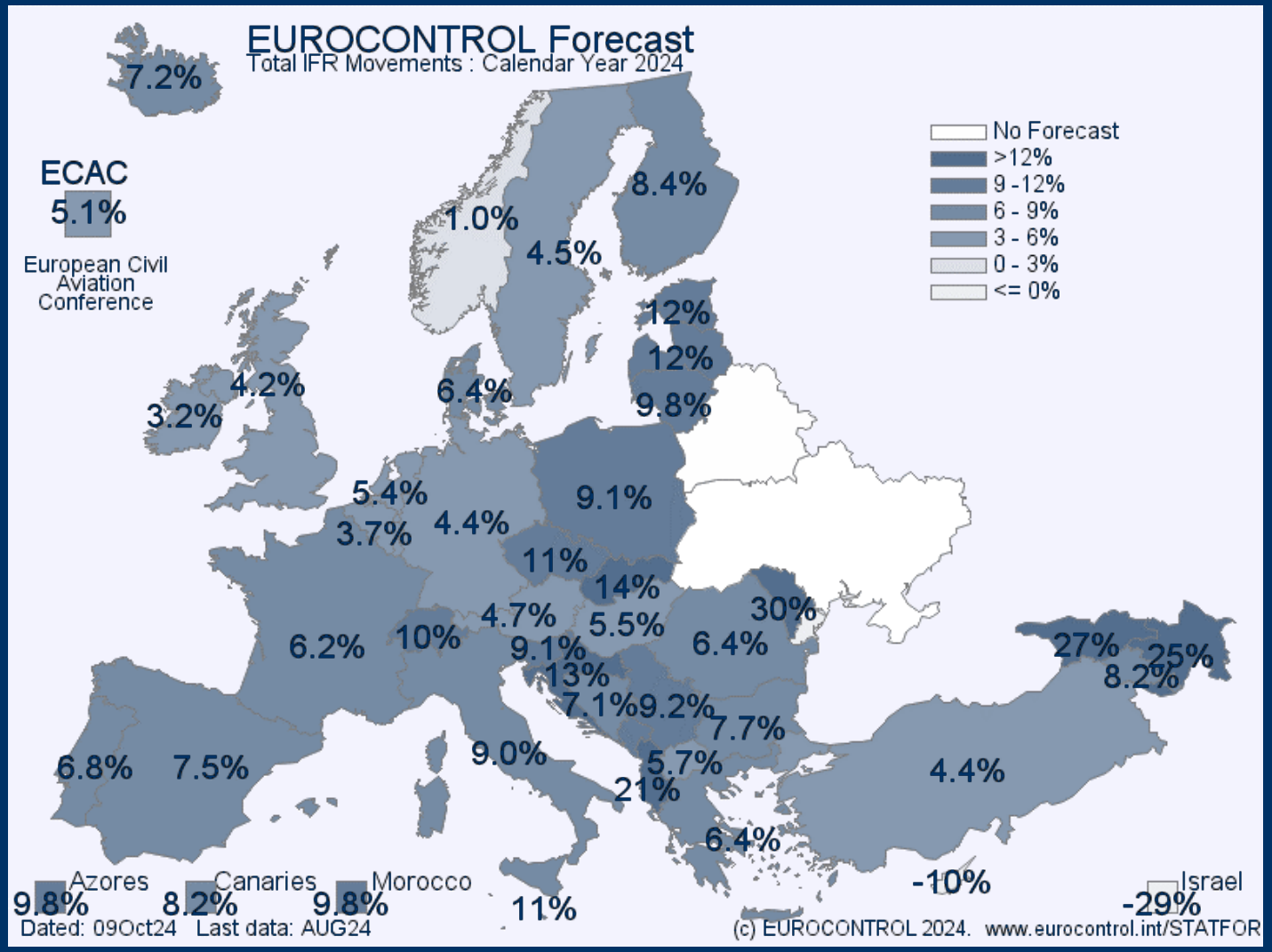
EUROCONTROL Flight Forecast Update for 2024

A revision for ECAC to +5.1% (±0.7pp), in line with the February 2024 forecast at network level.



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In the base scenario, within the projected 5.1% growth for Europe in 2024, key local disparities emerge:

- **Southeast Europe** is expected to experience strong growth, driven by touristic flows to Mediterranean destinations and flows to and from Asia and the Middle East.
- In **Northeast Europe,** the Baltic States are seeing growth in 2024 but continue to face challenges.

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

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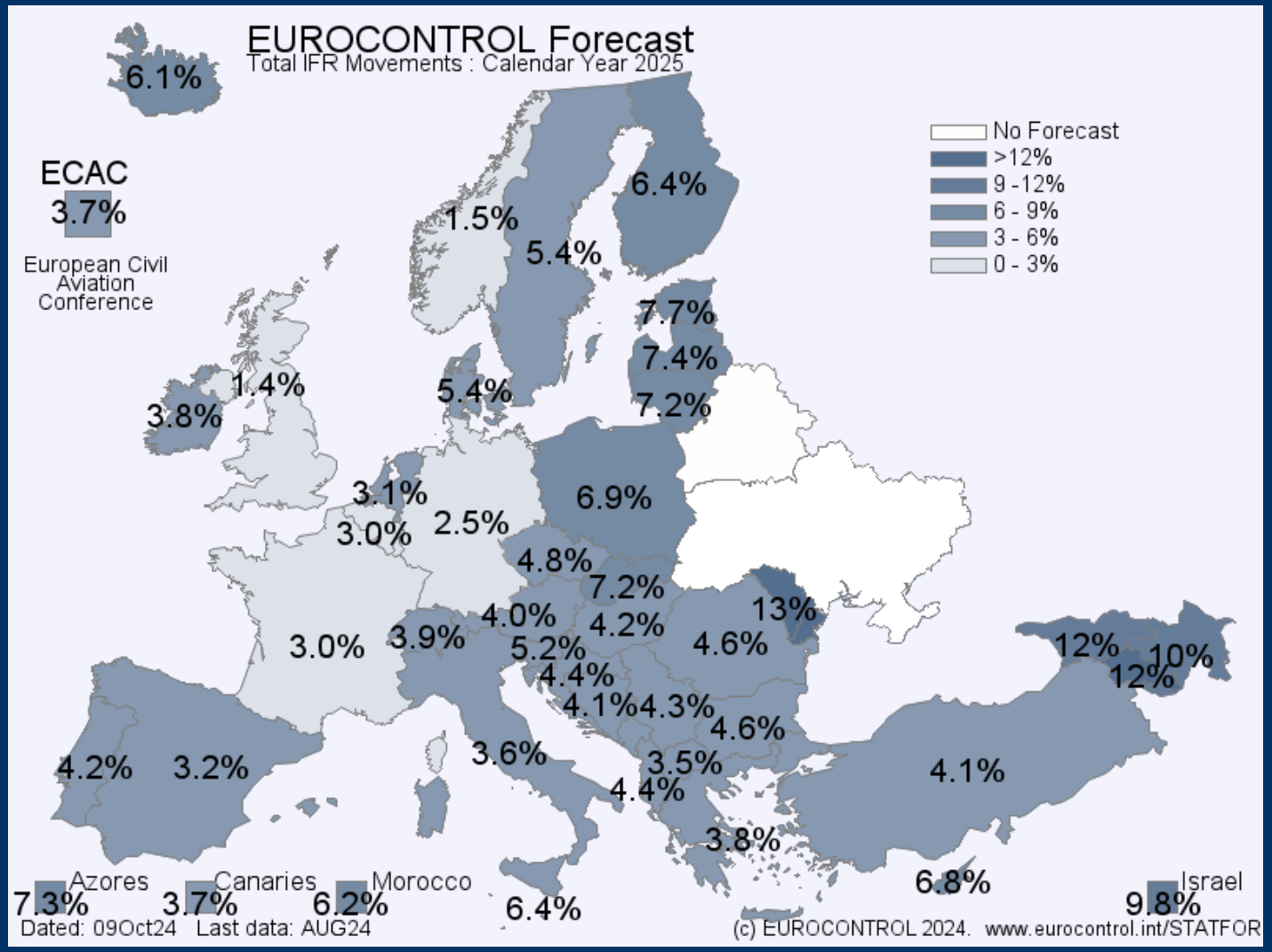
EUROCONTROL Flight Forecast Update for 2025

ECAC +3.7% (±1.7pp for low-to-high range)



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- Europe is forecasted to achieve a flight growth rate of 3.7% in 2025 (base scenario).
- This reflects the 2024 outturn, an improved economic outlook and optimistic airline schedules for winter 2024-2025.
- On a monthly basis, we project that the ECAC States will overall attain 2019 traffic levels in terms of flights during Summer 2025, despite notable local variation.

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

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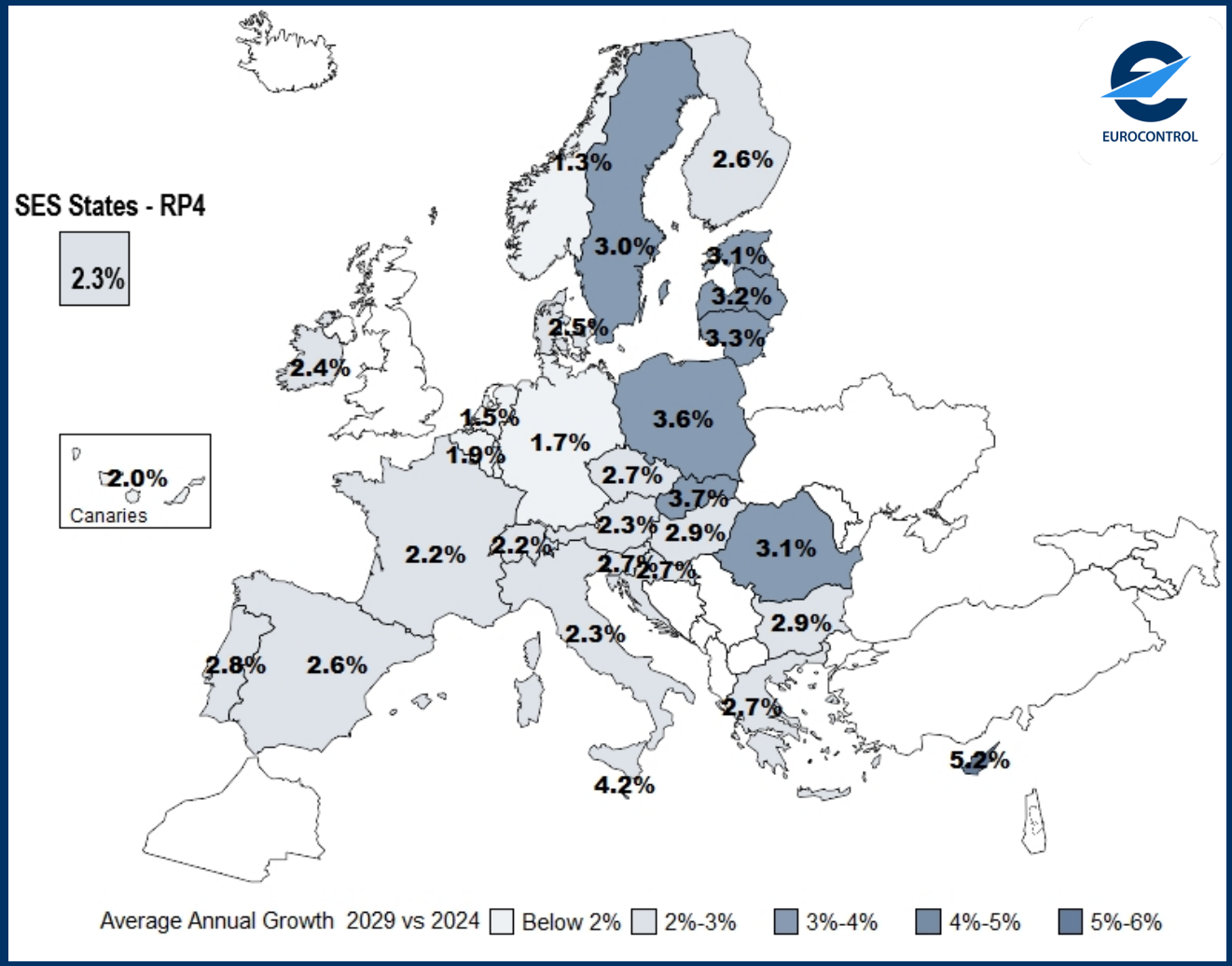
EUROCONTROL Flight Forecast Update for RP4

SES States Average Annual Growth for the 2025-2029 period: +2.3% (±1.5pp for low-to-high range)



** RP4 is the 4th Reference Period covering 2025-2029.*

- For the States involved in the SES Performance Scheme, flight growth is expected to average 2.3% annually (±1.5pp) between 2025 and 2029 (RP4*), representing a slight upwards revision from the previous forecast.
- Biggest upwards revisions (in absolute terms) against previous forecast publication for:

  Greece, Italy, Switzerland, Slovakia and Croatia mostly due to the changes in route patterns
- Biggest downwards revisions (in absolute terms) against previous forecast publication for:

  Germany, Belgium/Luxembourg, Austria, Ireland and Hungary owing to a mix of factors (operational challenges and impact of the conflict in Ukraine).

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

EUROCONTROL 7-Year Forecast Update for Europe* 2024-2030 (Autumn 2024)

Summary of IFR movements forecast

ECAC*		2019	2020**	2021	2022	2023	2024**	2025	2026	2027	2028**	2029	2030	AAGR 2024-2030	AAGR RP3	AAGR RP4
IFR Flight Movements (Thousands)	**High**	.	.	.	.	.	10,731	11,285	11,742	12,150	12,570	12,903	13,265	**3.9%**	**-0.6%**	**3.8%**
	Base	11,085	4,979	6,231	9,238	10,144	10,664	11,054	11,292	11,525	11,787	11,986	12,190	**2.7%**	**-0.8%**	**2.4%**
	Low	.	.	.	.	.	10,596	10,789	10,807	10,863	10,937	10,953	10,977	**1.1%**	**-0.9%**	**0.7%**
Annual Growth (%) Compared to previous year.	**High**	.	.	.	.	.	5.8%	5.2%	4.0%	3.5%	3.5%	2.6%	2.8%	**3.9%**	**-0.6%**	**3.8%**
	Base	0.8%	-55.1%	25.1%	48.3%	9.8%	5.1%	3.7%	2.1%	2.1%	2.3%	1.7%	1.7%	**2.7%**	**-0.8%**	**2.4%**
	Low	.	.	.	.	.	4.5%	1.8%	0.2%	0.5%	0.7%	0.1%	0.2%	**1.1%**	**-0.9%**	**0.7%**
Daily Growth (%) Compared to previous year. Removing leap year effect.	**High**	.	.	.	.	10%	5.5%	5.5%	4.0%	3.5%	3.2%	2.9%	2.8%	**3.9%**	**-0.7%**	**3.8%**
	Base	0.8%	-55%	25%	48%	10%	4.8%	3.9%	2.1%	2.1%	2.0%	2.0%	1.7%	**2.7%**	**-0.8%**	**2.4%**
	Low	.	.	.	.	10%	4.2%	2.1%	0.2%	0.5%	0.4%	0.4%	0.2%	**1.1%**	**-1.0%**	**0.7%**
Fraction of 2019 (%) Compared to 2019 level.	**High**	.	.	.	.	.	97%	102%	106%	110%	113%	116%	120%	-	-	-
	Base	100%	45%	56%	83%	92%	96%	100%	102%	104%	106%	108%	110%	-	-	-
	Low	.	.	.	.	.	96%	97%	97%	98%	99%	99%	99%	-	-	-

* ECAC is the European Civil Aviation Conference

** leap year

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

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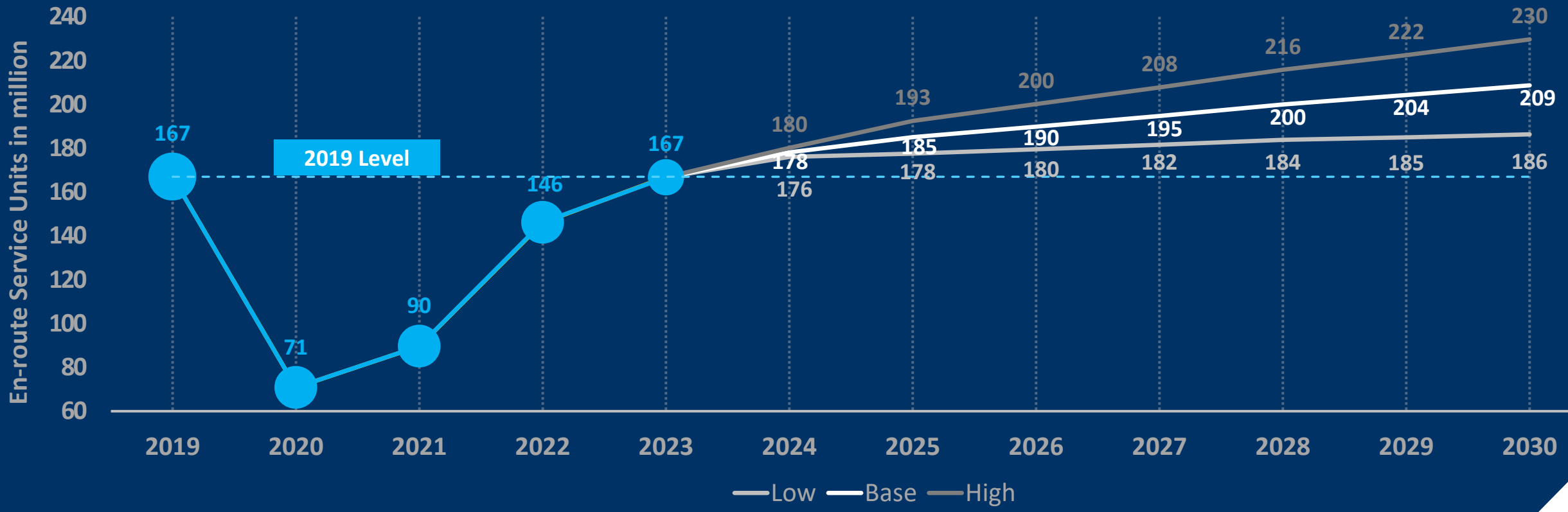
EUROCONTROL 7-Year Forecast Update for CRCO Region° 2024-2030 (Autumn 2024)

Actual and future Total en-route Service Units (TSU)



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

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

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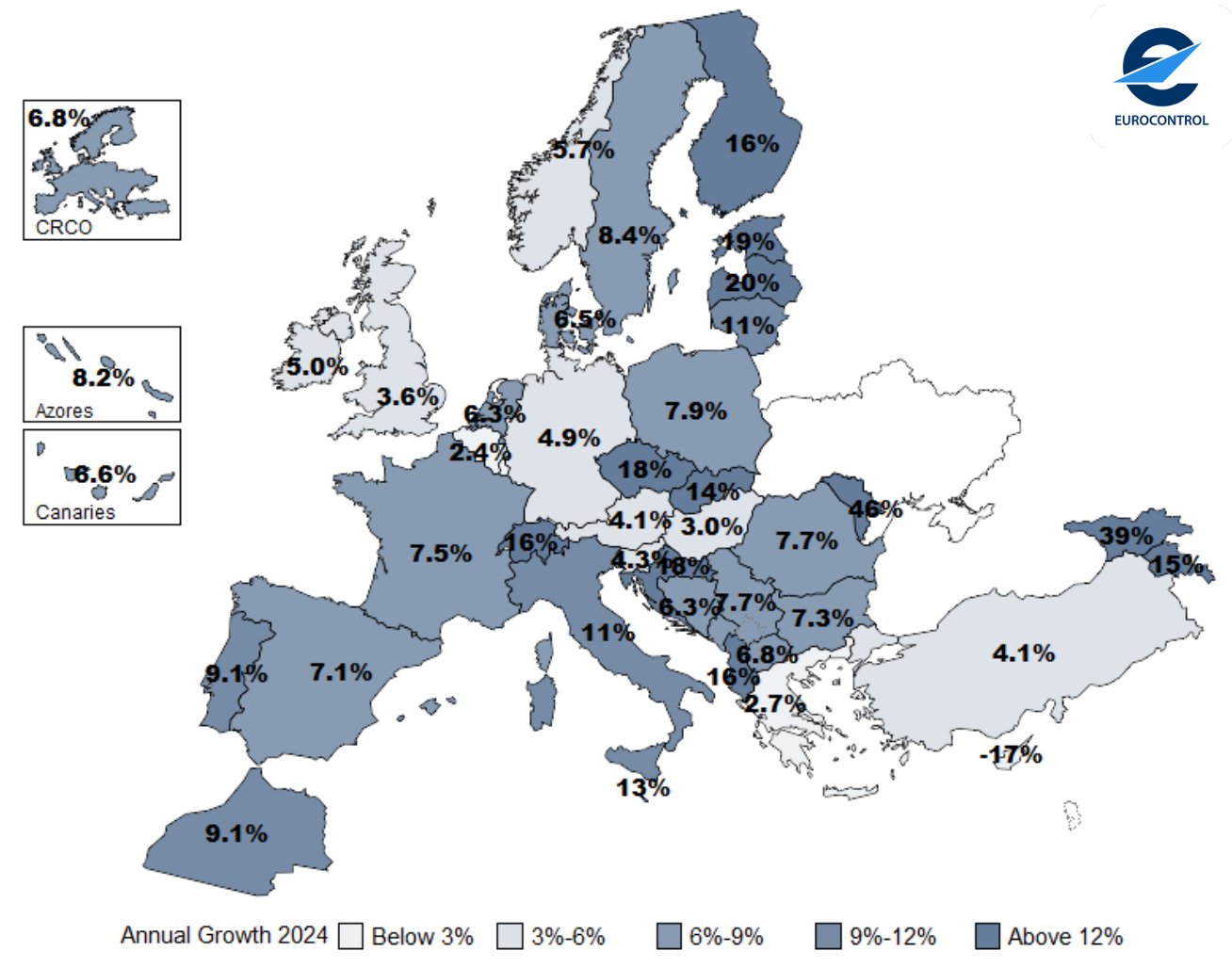
EUROCONTROL TSU Forecast Update for 2024

An upwards revision for CRCO° to +6.8% (±1.3pp), compared to the February 2024 forecast



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

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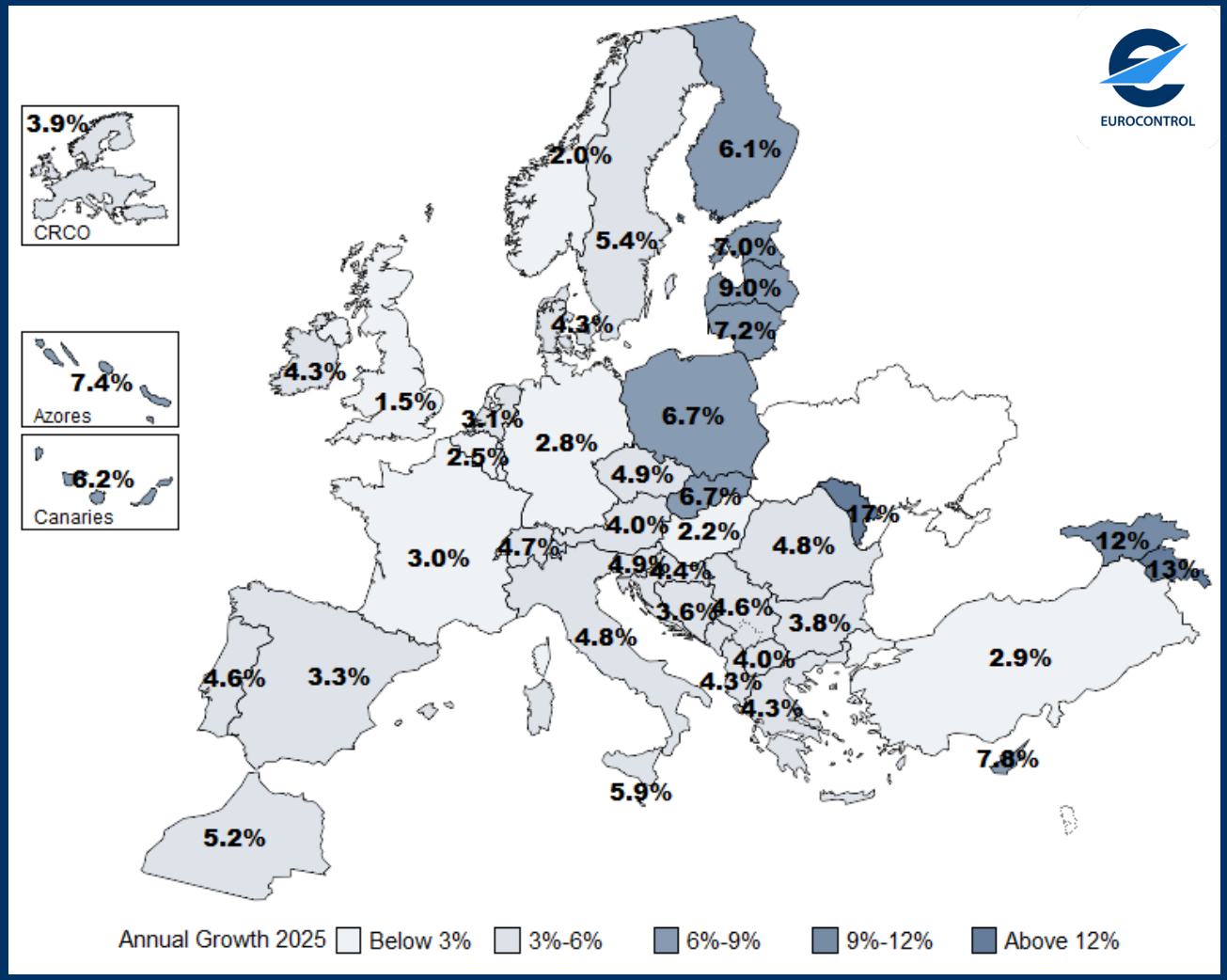
In the base scenario, within the projected 6.8% growth for Europe in 2024, local disparities emerge especially in Eastern Europe:

- **Baltic States** are strongly revised upwards thanks to the recovery of some traffic to and from Asia as well as by strong traffic from the Russian Federation (both domestic and to and from Türkiye) and expect double digit growths.
- **Southeast Europe** is expected to experience strong growth, driven by increased travel flows to and from Asia and the Middle-East. However, disparities appear due to the shift in traffic more West to avoid capacity-constrained regions and some areas of tensions in the Middle-East later in the routes. We **have forecasts revised** both **upwards** (e.g. Italy, Croatia and Albania) **as well as downwards** (e.g. Hungary and Türkiye)
- Some **Central European States** have also gained traffic to and from Asia that is avoiding the Middle-East Region and foresee double digit TSU growth (e.g. Slovakia, Czech Republic, Georgia and Armenia)

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

EUROCONTROL TSU Forecast Update for 2025

CRCO° is expected to grow by +3.9% (±3pp for low-to-high range)



- This is also a revision upwards compared to the February 2024 forecast but this forecast growth is in line with the one foreseen in the May 2024 forecast update.
- In 2025, Total en-route Service Units are expected to reach **185.0 Million** in the Base forecast for the CRCO° Region vs. **182.2 Million** in the February 2024 forecast and **184.3 Million** in the May 2024 update.
- Growth rates are expected to remain more moderate in Southeast Europe than in 2023 and 2024
- However, large uncertainties exist due to the volatility of traffic and the route flexibility around the smallest States of Europe

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

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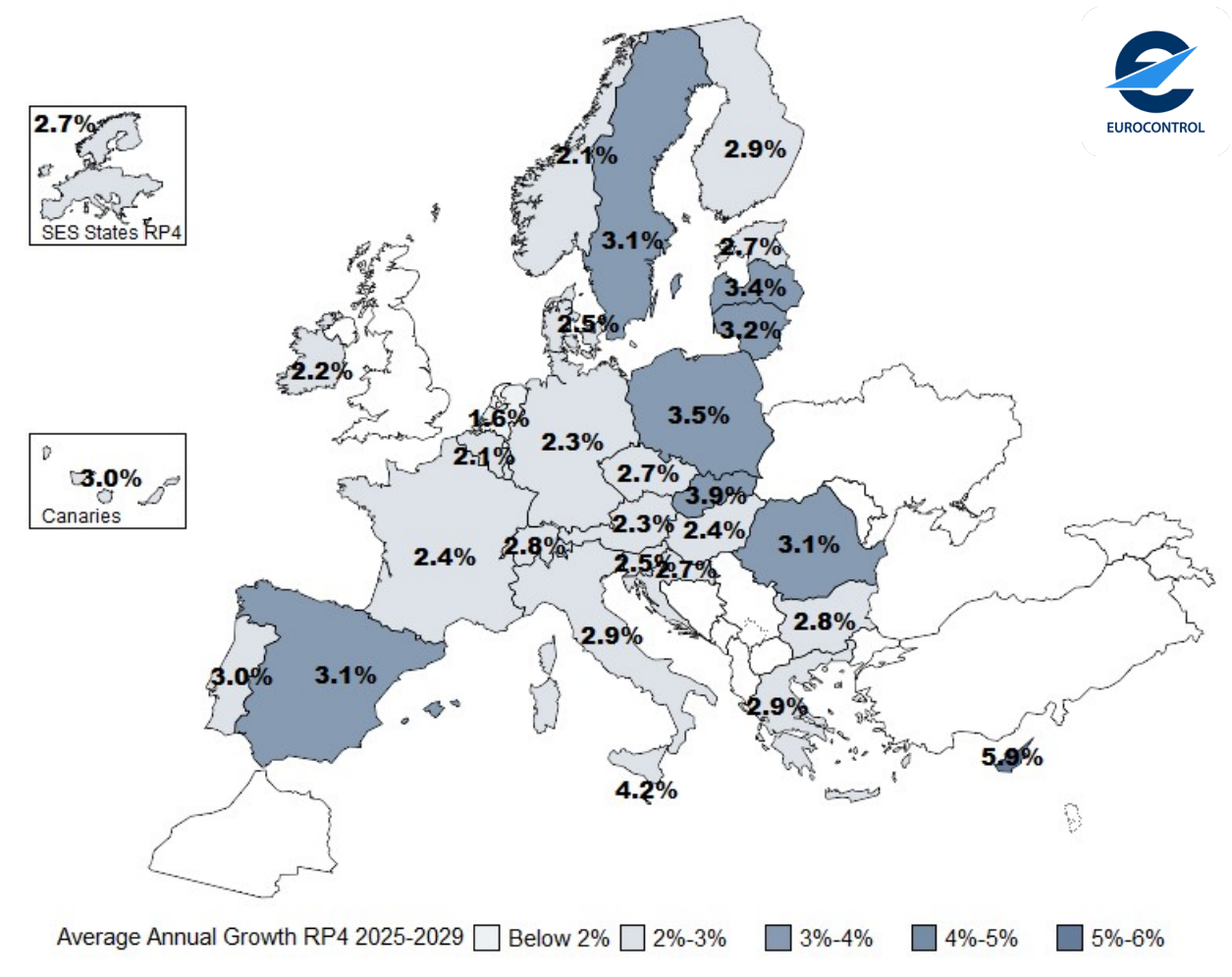
Source:
EUROCONTROL 7-Year Forecast 2024-2030, Autumn 2024

EUROCONTROL TSU Forecast Update for RP4

SES States Average Annual Growth for the 2025-2029 period: +2.7% (±1.7pp for low-to-high range)



- By 2029 the TSU growth is expected to become more homogeneous around Europe between Eastern and Western States with revisions compared to the February 2024 forecast in line with the revisions of the flight forecast.
- Users of the forecast are strongly advised to consider the forecast range (low to high) as a tool to manage business risks, including part of the variability in the routes.
- This forecast is subject to various uncertainties, including potential geopolitical disruptions, economic shocks, and ongoing challenges in the aviation industry.
- The impact of the geopolitical events that occurred in October 2024 in the Middle-East are not included in this forecast.

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

EUROCONTROL 7-Year Forecast Update for CRCO° 2024-2030 (Autumn 2024)

Summary of En Route Service Units Forecast

CRCO°		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**	.	.	.	.	.	180,179	192,512	200,152	207,752	215,810	222,472	229,672	**4.7%**	**1.5%**	**4.3%**
	Base	167,000	70,828	89,680	146,221	166,751	178,100	185,039	189,842	194,690	200,035	204,270	208,712	**3.3%**	**1.3%**	**2.8%**
	Low	.	.	.	.	.	176,039	177,577	179,546	181,605	183,855	185,016	186,359	**1.6%**	**1.1%**	**1.0%**
Annual Growth (%) Compared to previous year.	**High**	.	.	.	.	.	8.1%	6.8%	4.0%	3.8%	3.9%	3.1%	3.2%	**4.7%**	**1.5%**	**4.3%**
	Base	6.1%	3%	27%	63%	14%	6.8%	3.9%	2.6%	2.6%	2.7%	2.1%	2.2%	**3.3%**	**1.3%**	**2.8%**
	Low	.	.	.	.	.	5.6%	0.9%	1.1%	1.1%	1.2%	0.6%	0.7%	**1.6%**	**1.1%**	**1.0%**
Daily Growth (%) Compared to previous year (Removing leap year effect).	**High**	.	.	.	.	.	7.8%	7.1%	4.0%	3.8%	3.6%	3.4%	3.2%	**4.7%**	**1.5%**	**4.4%**
	Base	2.8%	-58%	27%	63%	14%	6.5%	4.2%	2.6%	2.6%	2.5%	2.4%	2.2%	**3.3%**	**1.2%**	**2.8%**
	Low	.	.	.	.	.	5.3%	1.2%	1.1%	1.1%	1.0%	0.9%	0.7%	**1.6%**	**1.0%**	**1.1%**
Fraction of 2019 (%) Compared to 2019 level.	**High**	.	.	.	.	.	108%	115%	120%	124%	129%	133%	138%	.	.	.
	Base	100%	42%	54%	88%	100%	107%	111%	114%	117%	120%	122%	125%	.	.	.
	Low	.	.	.	.	.	105%	106%	108%	109%	110%	111%	112%	.	.	.
SES-RP3/RP4°°		**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**	.	.	.	.	.	132,703	141,862	147,474	153,009	158,781	163,471	168,498	**4.7%**	**1.2%**	**4.3%**
	Base	125,206	52,595	66,991	108,508	122,491	131,164	136,365	139,810	143,322	147,176	150,189	153,301	**3.3%**	**0.9%**	**2.7%**
	Low	.	.	.	.	.	129,697	130,987	132,274	133,728	135,325	136,098	136,986	**1.6%**	**0.7%**	**1.0%**
Annual Growth (%) Compared to previous year.	**High**	.	.	.	.	.	8.3%	6.9%	4.0%	3.8%	3.8%	3.0%	3.1%	**4.7%**	**1.2%**	**4.3%**
	Base	6.1%	3%	27%	62%	13%	7.1%	4.0%	2.5%	2.5%	2.7%	2.0%	2.1%	**3.3%**	**0.9%**	**2.7%**
	Low	.	.	.	.	.	5.9%	1.0%	1.0%	1.1%	1.2%	0.6%	0.7%	**1.6%**	**0.7%**	**1.0%**
Daily Growth (%) Compared to previous year (Removing leap year effect).	**High**	.	.	.	.	.	8.0%	7.2%	4.0%	3.8%	3.5%	3.2%	3.1%	**4.7%**	**1.1%**	**4.3%**
	Base	2.8%	-58%	28%	62%	13%	6.8%	4.2%	2.5%	2.5%	2.4%	2.3%	2.1%	**3.3%**	**0.9%**	**2.8%**
	Low	.	.	.	.	.	5.6%	1.3%	1.0%	1.1%	0.9%	0.8%	0.7%	**1.6%**	**0.7%**	**1.0%**
Fraction of 2019 (%) Compared to 2019 level.	**High**	.	.	.	.	.	106%	113%	118%	122%	127%	131%	135%	.	.	.
	Base	100%	42%	54%	87%	98%	105%	109%	112%	114%	118%	120%	122%	.	.	.
	Low	.	.	.	.	.	104%	105%	106%	107%	108%	109%	109%	.	.	.

° CRCO corresponds to the 39 Contracting States of the Multilateral Route Charges System (without Ukraine).
°° SES-RP3/RP4 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, Autumn 2024

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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:** societal pressures on aviation for environmental reasons 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 currently restricted airspaces will be fully reopened. 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.
- 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 geopolitical events that occurred in October in the Middle-East were not included in this forecast.

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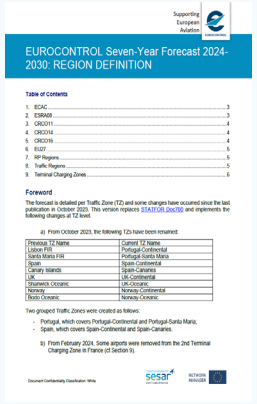
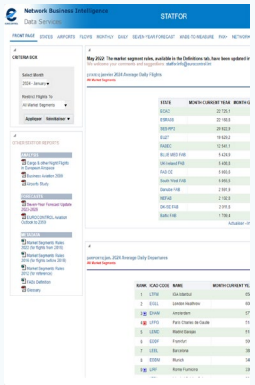
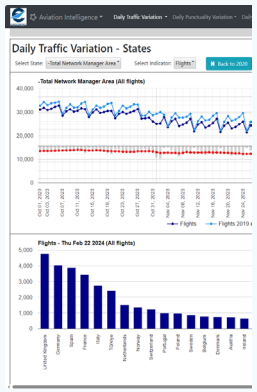
Useful links



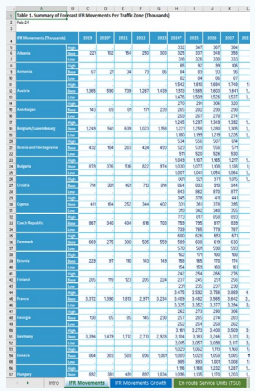
A presentation of the geographical definitions can be found in
Annex - Traffic Region Definitions



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

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SUPPORTING EUROPEAN AVIATION

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 Data Mobile App**
   Android Play Store Apple App Store
   This App has been developed to provide the general public as well as decision-makers with high-level and up-to-date daily data instantly to manage their business.