SUPPORTING
EUROPEAN
AVIATION

EUROCONTROL SEVEN-YEAR FORECAST 2025-2031

Spring 2025

CONSORTIUM COORDINATOR sesar DEPLOYMENT MANAGER

FOUNDING MEMBER sesar JOINT UNDERTAKING

NETWORK MANAGER

Inputs and Assumptions

The Spring 2025 forecast horizon is seven years. It includes three scenarios (covering statistical uncertainties) and incorporates:

Traffic trends up to January 2025 in the Network Manager area

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 conflicts and subsequent airspace (un)availabilities.

Full review of the inputs

Latest revisions of future economic growth, future load factors, World population prospect, propensity to fly, sports or other major planned events, high-speed rail network developments, low-cost market developments and airport forecast (maximum) capacity.

Routes

Statistical distribution of 2024 routes combined with recent overflights trends per State are used to forecast overflight flows.

Technical assumption on routings over the 2025-2031 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 2024 forecast.

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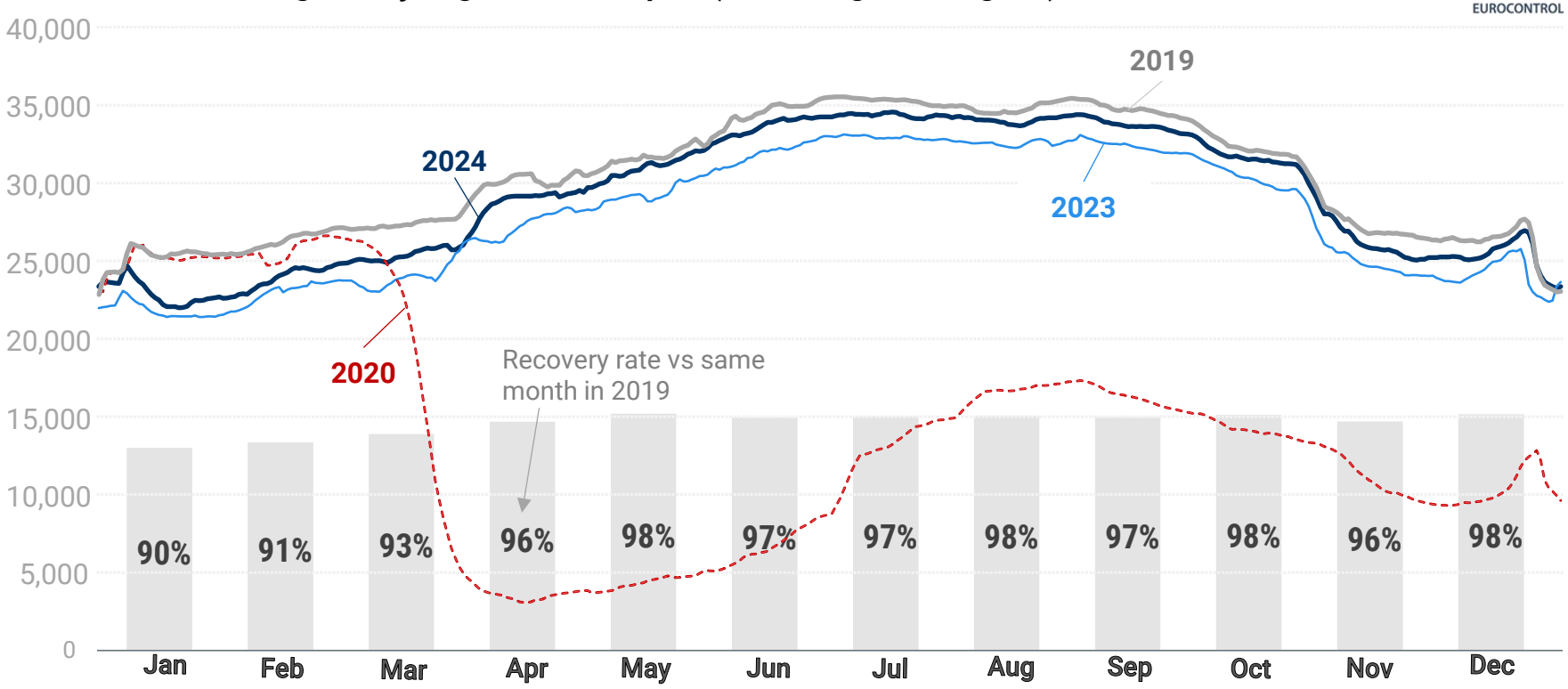
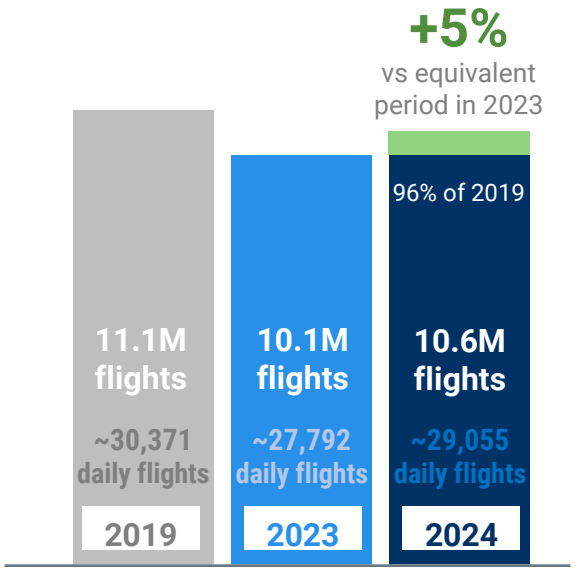
Flight Trends

In 2024, IFR movements experienced 5% growth, reaching 96% of pre-pandemic levels.

Evolution of average daily flights in Europe* (including overflights)





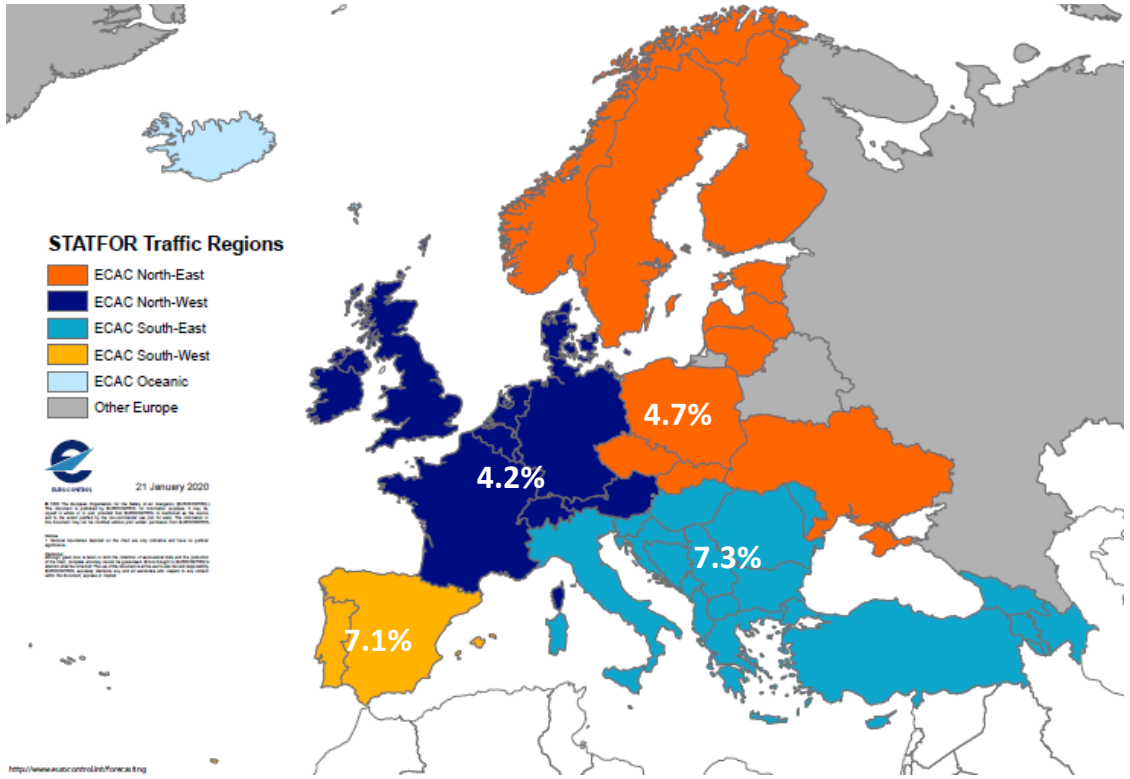
- During the **first quarter** of **2024**, the **recovery** levels averaged **92%**: since the start of Winter 2023/2024 season, some aircraft operators **cut capacity** owing to lower-than-expected demand, some **weather issues** and the impact of the conflict in Israel/Gaza.
- From April onwards, the **volume** of **flights** started to **pick up** (96% of 2019 levels) with the start of the **Summer 2024** period. The peak day for the year was recorded on Friday 14 June (37,510 flights controlled in the network).
- The **highest monthly recovery** level **so far** was **98%** of **2019** levels for Europe.

* Europe = ECAC 44 Member States

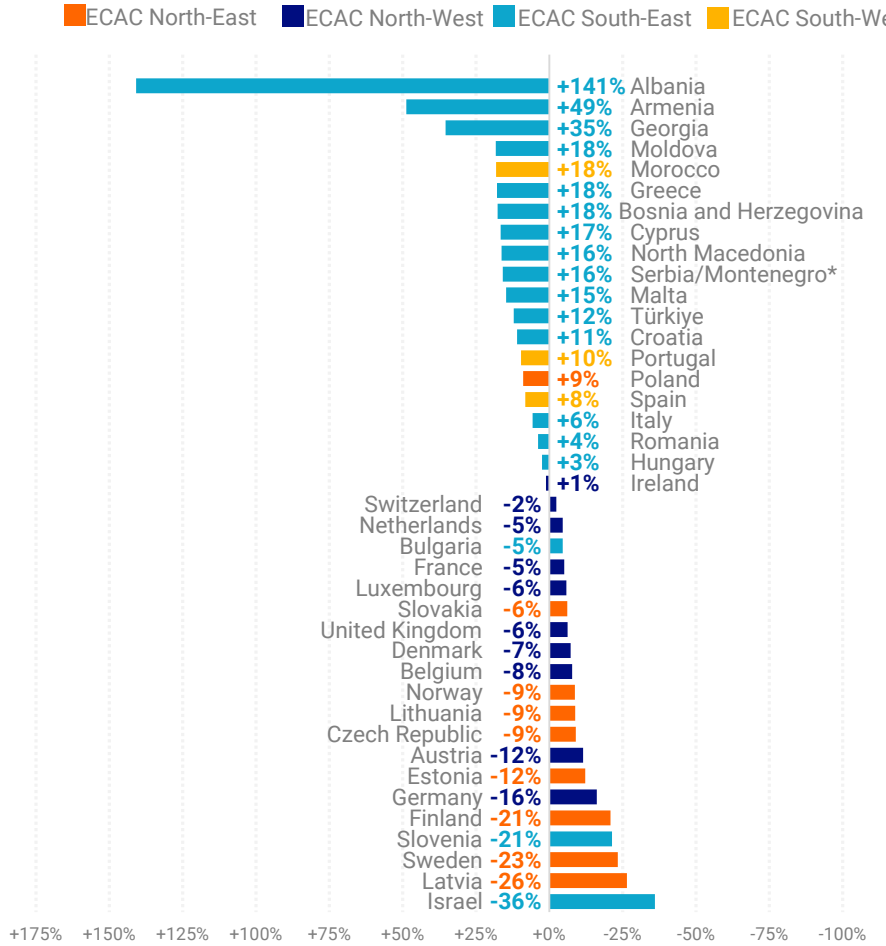
Flight Trends

Local disparities highlight a "two-speed" Europe.
Southern Europe shows highest 2024 growth rates and is already above 2019 levels.

Growth rates (2024 vs 2023)
Arrivals/Departures/Internals



Recovery 2019 levels
Arrivals/Departures/Internals



*Based on integrated ANSP

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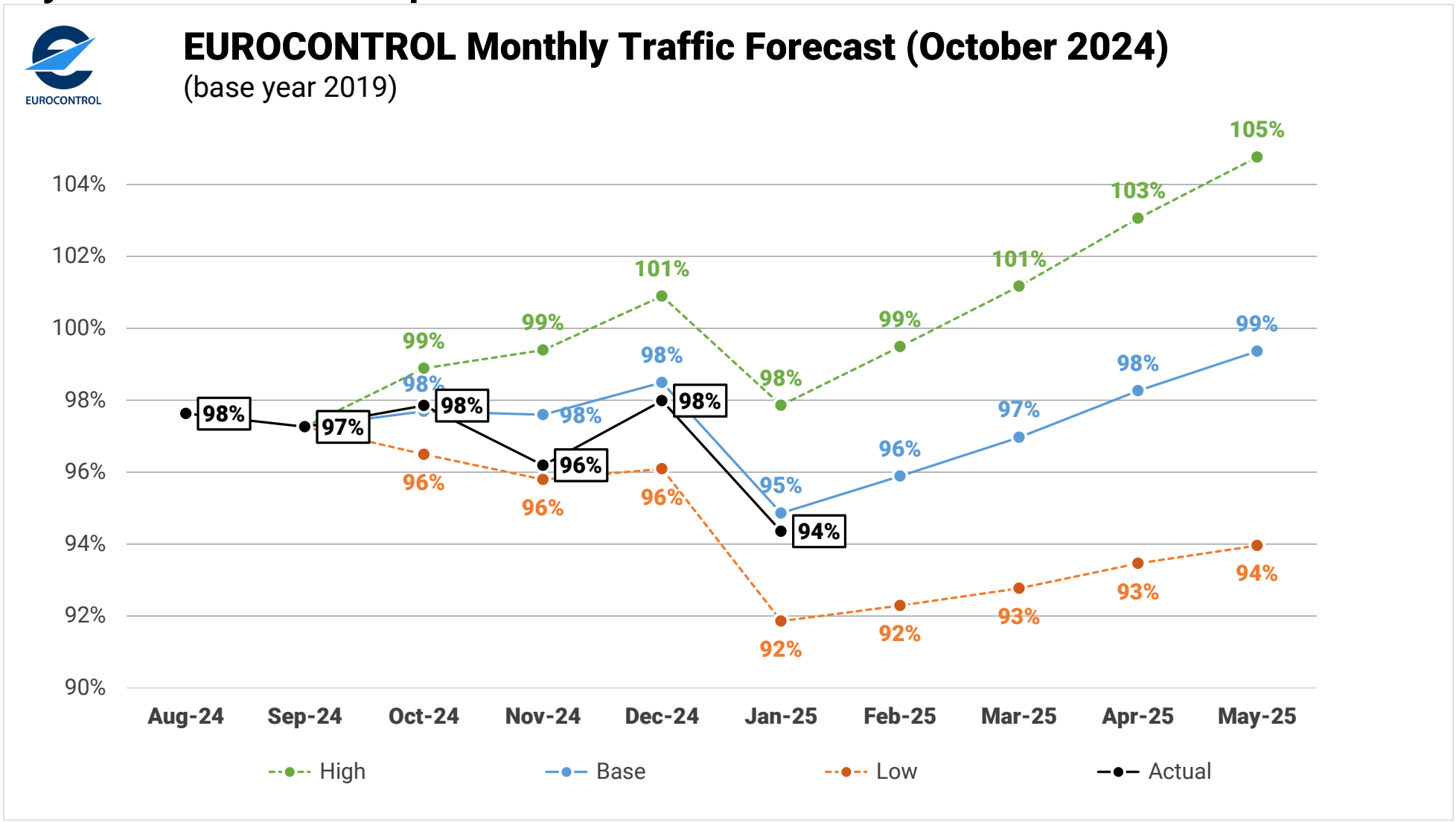
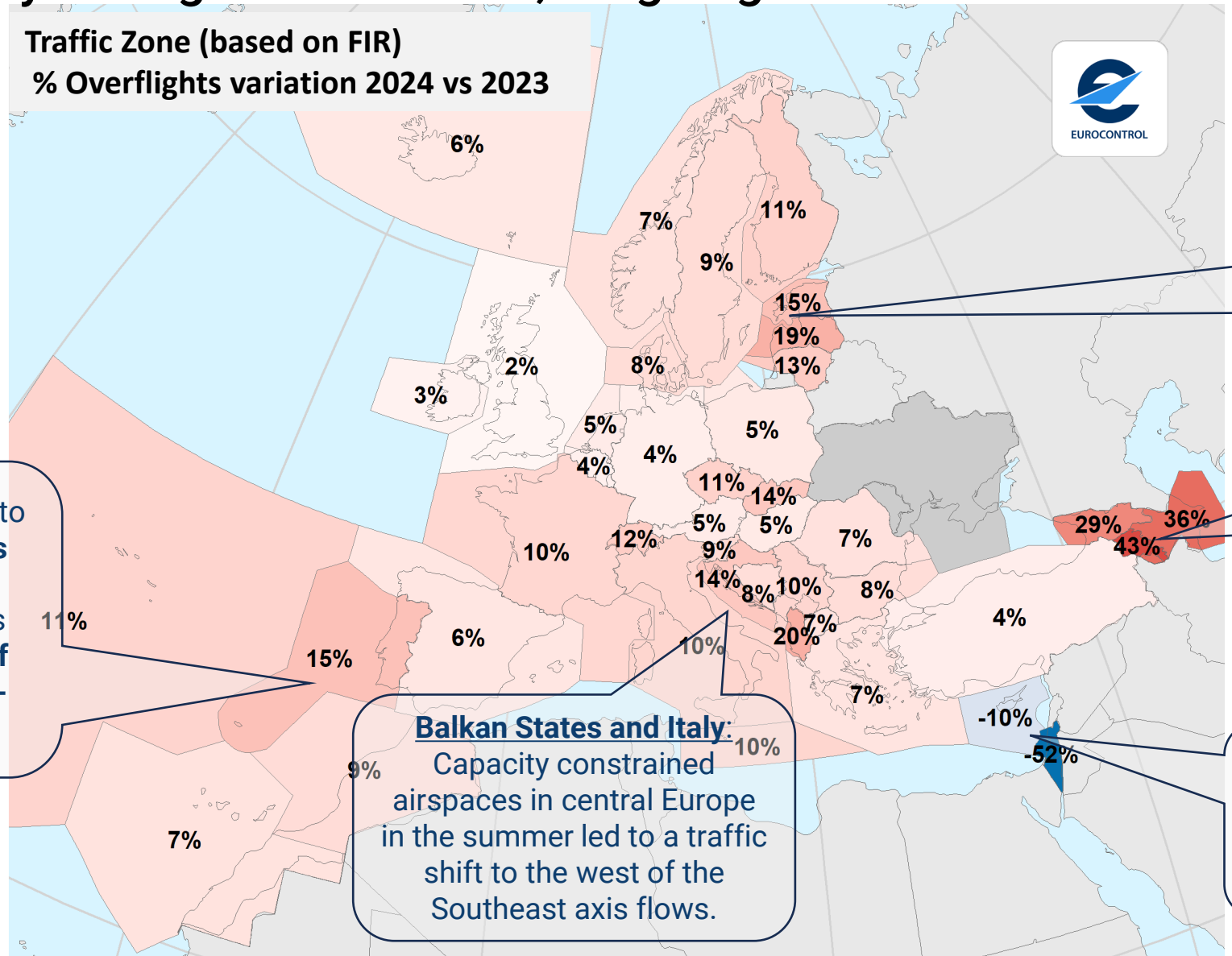
Flight Trends

European flights, overall, very slightly below the base scenario of the monthly traffic forecast published in Autumn 2024.



Overflight Trends

Driven by strong tourism flows, on-going conflicts and constrained airspaces.



Baltic region: Increased overflights by carriers not subject to the geopolitical sanctions imposed on European airlines.

South Caucasus: Overflights significantly increased with traffic avoiding airspaces constrained by the conflicts in Ukraine and Israel/Gaza.

Portugal: Flows to **Spain-Canaries** flying more westerly routes and **recovery of South and Mid-Atlantic flows**.

Balkan States and Italy: Capacity constrained airspaces in central Europe in the summer led to a traffic shift to the west of the Southeast axis flows.

Israel and Cyprus: The situation in Israel/Gaza led to volatility in terms of airspace and route availability in the Middle-East.

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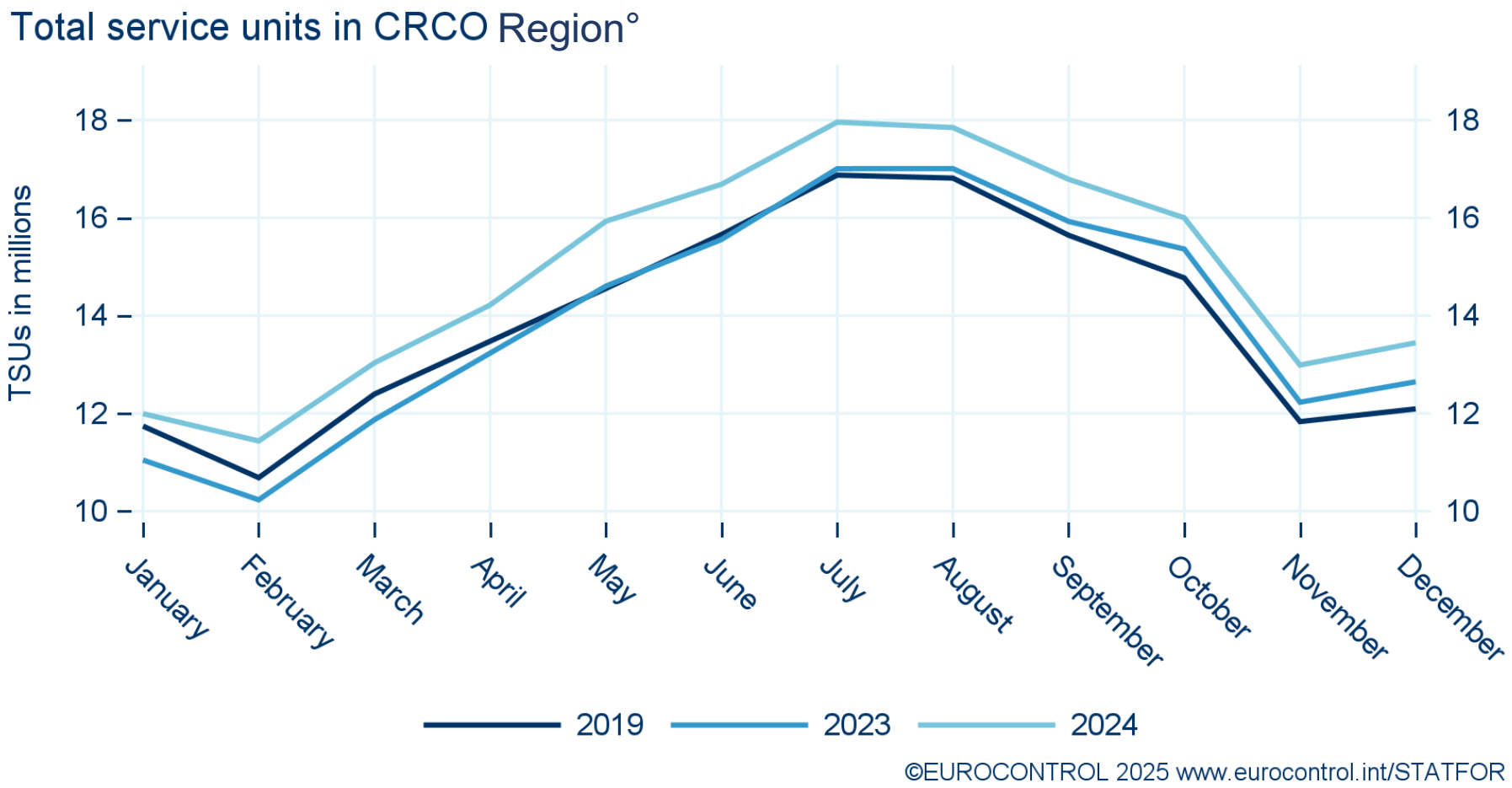
Total service units (TSU) trends

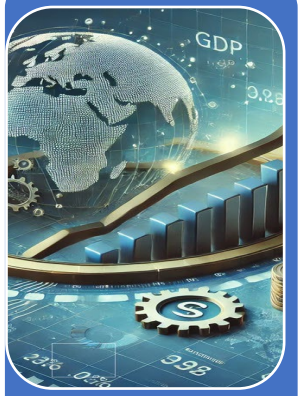
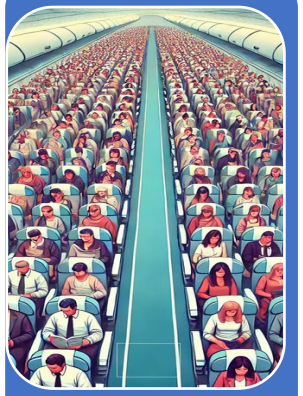
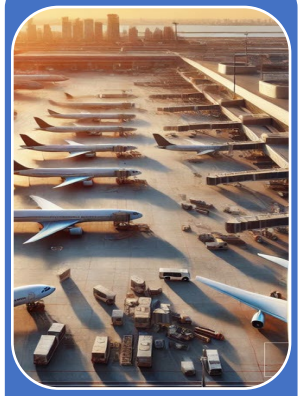
In 2024, TSU grew 7% compared to 2023 in the CRCO Region°, reaching 107% of 2019



- CRCO Region generated **178.4 million** Total En-Route Service Units in 2025
- Huge disparities between North-East Europe and South-East associated with the war in Ukraine:
  - **Fewer flights** in the North and TSU levels lower than in 2019,
  - **More flights and distance flown** in the South and TSU levels above 2019.

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

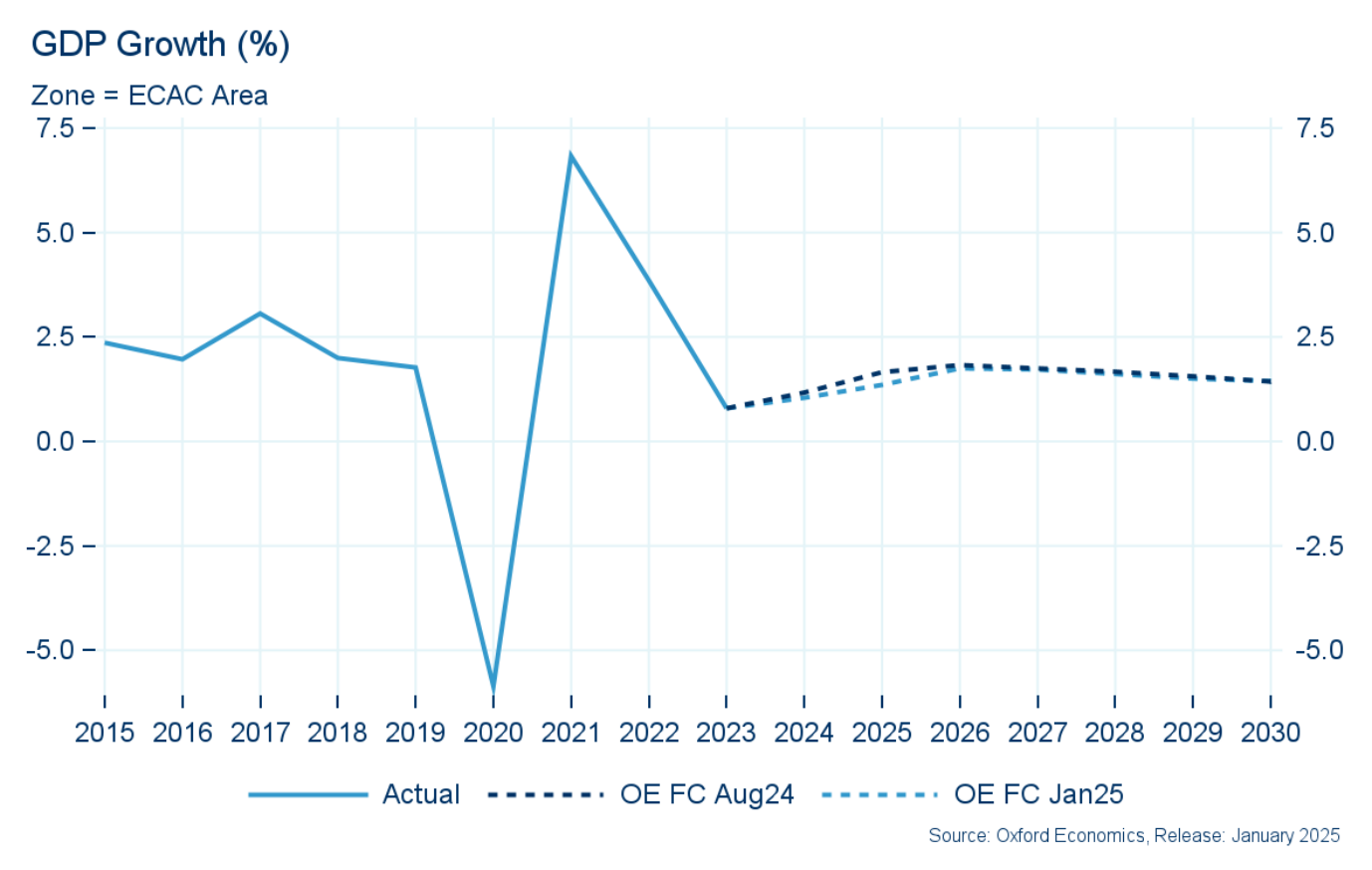
Full review of all inputs

Economic Growth	Load Factors	Events & Trends	High Speed Train Development	Demographics	Low-Cost Market Share	Schedules	Airport Capacities
							
Source: Oxford Economics, January 2025	Source: Eurostat, Air transport measurement – passengers and freight, December 2024	Source: EUROCONTROL data analysis	Source: Plans UIC, TEN-T, On-line timetables, December 2024	Source: United Nations, Population Prospects 2024	Source: STATFOR analysis and modelling	Source: Airlines high level planning provided to EUROCONTROL, February 2025	Source: EUROCONTROL Airport Corner and Stakeholders assumptions, January 2025

All inputs updated. Underlying data available in the Annex - Detailed Traffic Forecast

Economic Growth

The economic forecast growth for Europe sees a slight downward revision in 2025, but remains unchanged after that.



- European economic activity remains **sluggish**.
- Downward revision for:
  - **2024:** Slower Q3-Q4 growth, persistent inflation, and U.S. election uncertainty dampened consumer spending and export demand.
  - **2025:** Prolonged effects of high interest rates and inflation, coupled with post-election U.S. policy shifts, delayed Europe's recovery.
- Uncertainty remains very high, with **risks** skewed to the **downside**.

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Airlines Schedules for Summer 2025

Using a different source than usually

- Experience of previous years has shown that **published Schedules evolve** significantly over time.
- In order to **improve the quality** of the forecasting, aircraft operators have provided to **EUROCONTROL** their **latest high level planning for Summer 2025**.
- While the coverage is not complete, this may well provide a **more accurate/reliable source for Summer 2025**.

Fleet development

- Technical issues (P&W engines) have caused some airlines to ground part of their fleet for mandatory maintenance. This, coupled with delays in aircraft deliveries, seems to have a limited impact on airlines' expansion plans for 2025 but is likely to affect the rest of the horizon.

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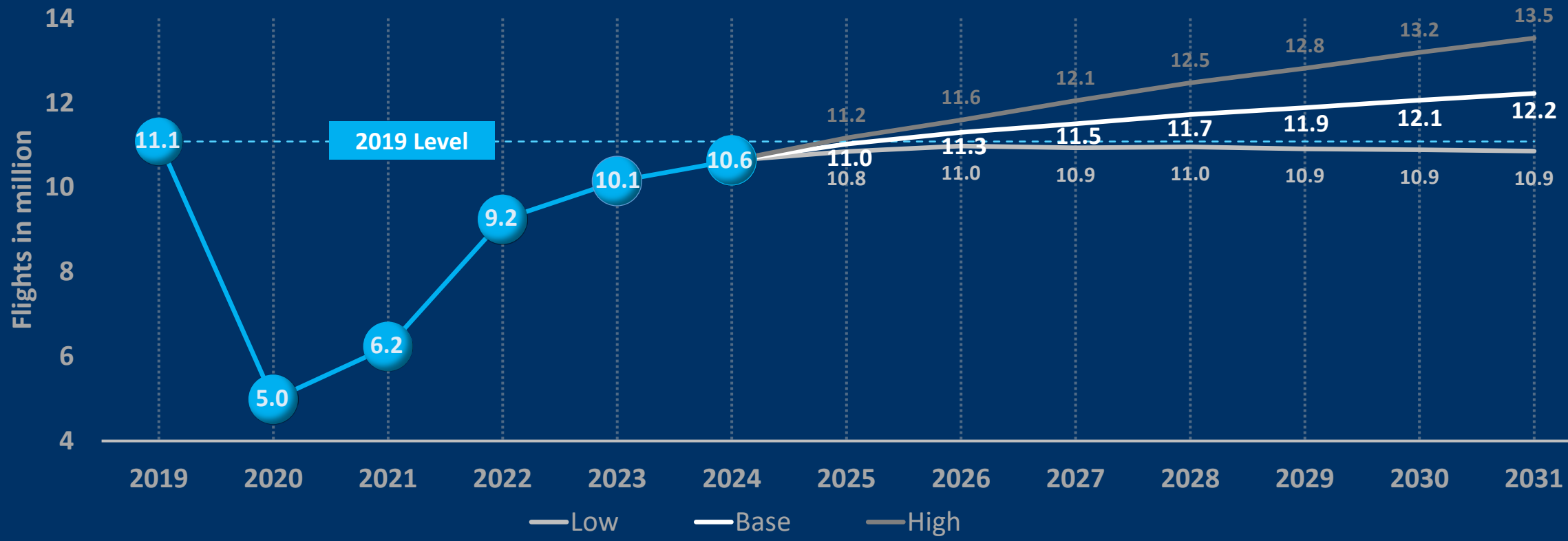
EUROCONTROL 7-Year Forecast for Europe* 2025-2031 (Spring 2025)

Actual and future IFR movements



* Europe = ECAC 44 Member States

Source:
EUROCONTROL 7-Year Forecast 2025-2031, Spring 2025

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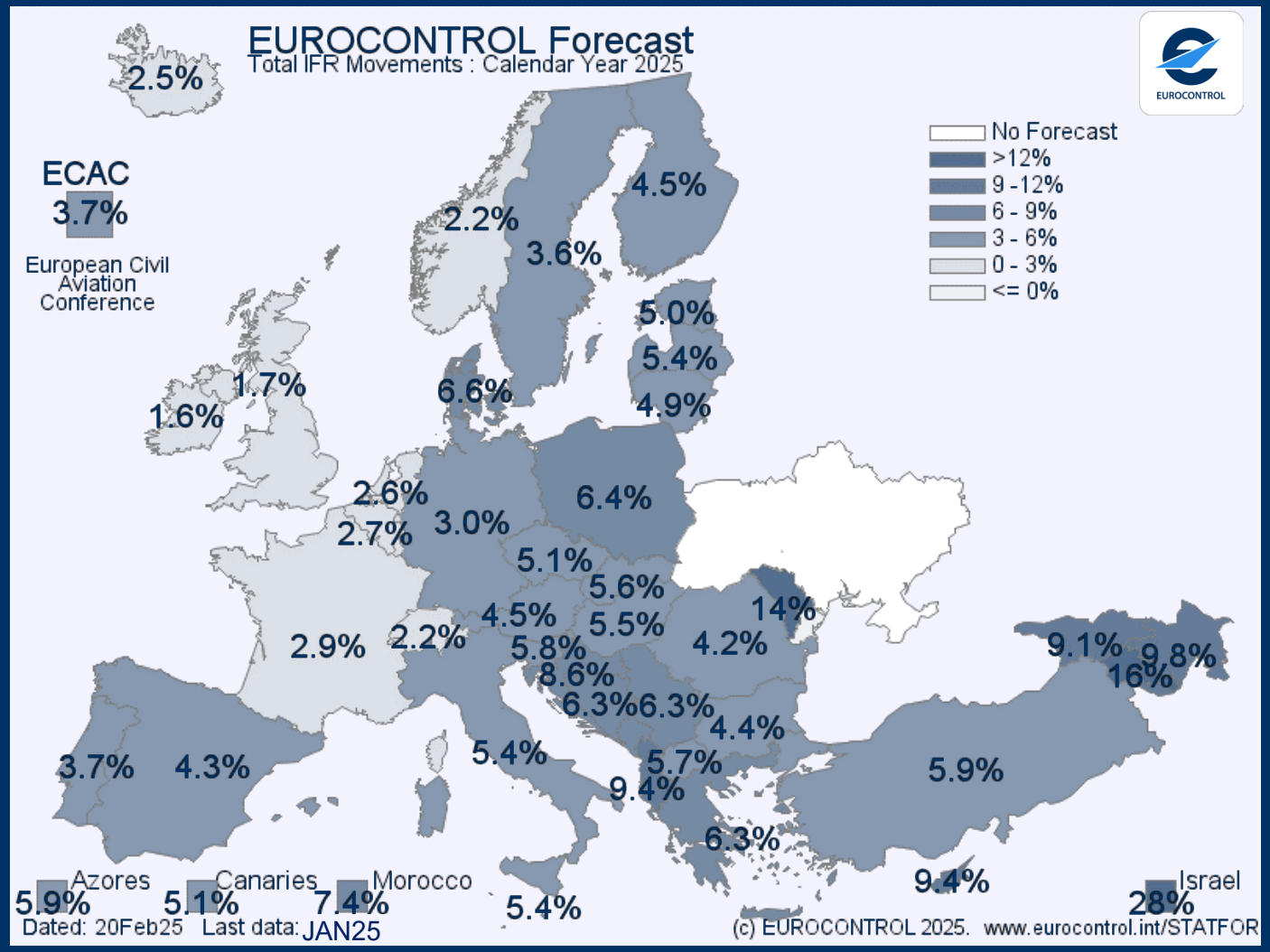
EUROCONTROL Flight Forecast for 2025

Expected growth for ECAC is +3.7% (±1.6pp), in line with the Autumn 2024 forecast.



The designations employed 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.

- **Forecast growth remains unchanged from the previous forecast** in the base scenario.
- **Europe**'s flight **growth rate** is projected at **3.7%** in **2025** (base scenario).
- This reflects both a **downward revision** of the **economic outlook** and a **relative optimism** from **airlines** for **Summer 2025**.
- On a **monthly** basis, **ECAC States** are **expected** to **reach 2019** traffic **levels** (in terms of flights) during Summer 2025, though local variations remain.
- **Disparities** across **regions** are **less pronounced** than in **previous years**.

Source:
EUROCONTROL 7-Year Forecast 2025-2031, Spring 2025

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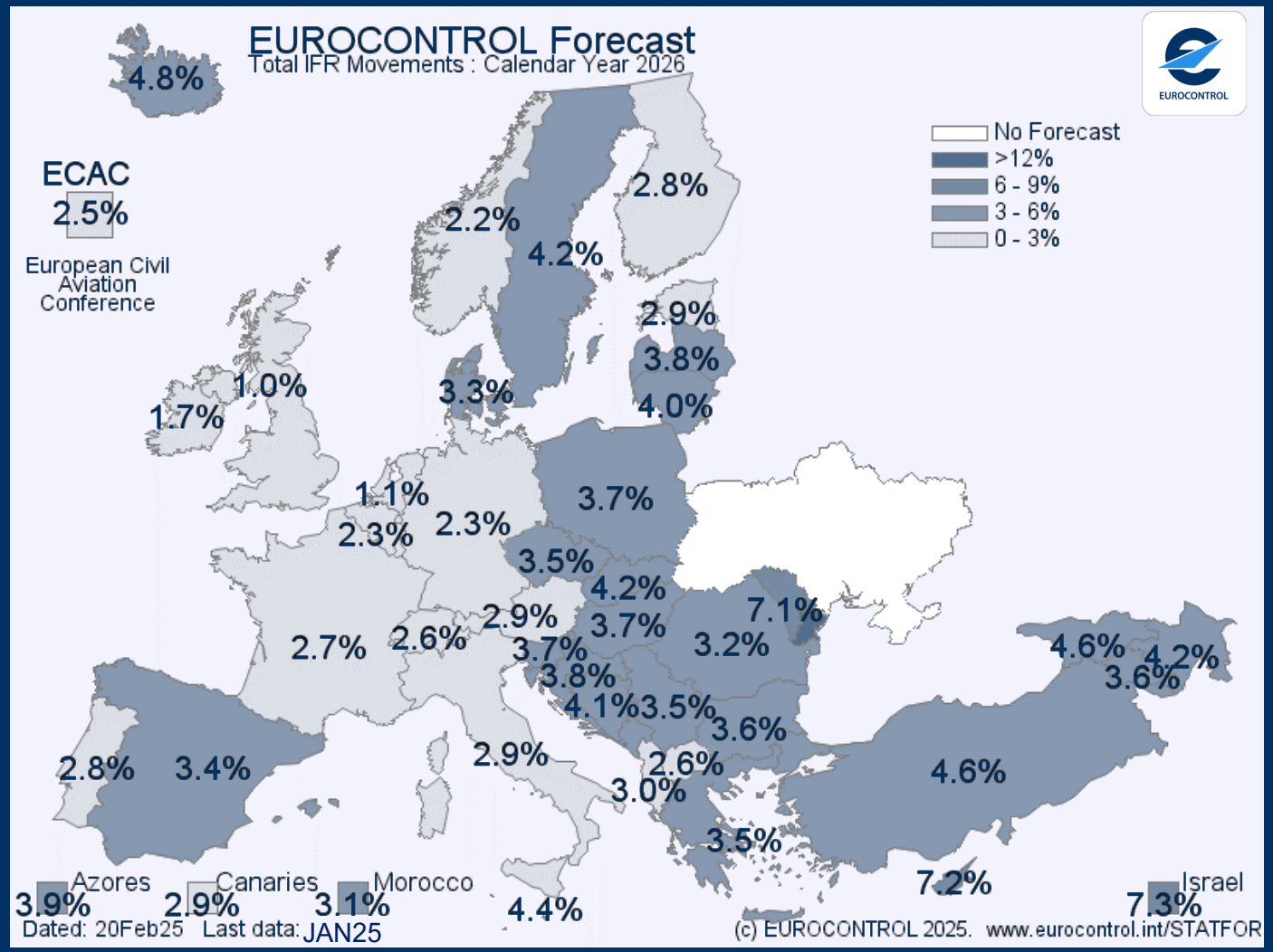
EUROCONTROL Flight Forecast for 2026

Expected growth for ECAC is +2.5% (±1.3pp for low-to-high range)



- **Europe** is forecast to record a **flight growth** rate of **2.5%** (±1.3 pp) in **2026** (base scenario).
- **South-East** and **North-East** European States are expected to record higher growth than in the rest of Europe (sustained tourism and flows to Asia/Pacific and Middle-East).
- Some of the busy **North-West European** States are expected to record **stagnation** in their **domestic** flows compared to the 2025 levels.
- Türkiye remains one of the most dynamic State in terms of growth rates.

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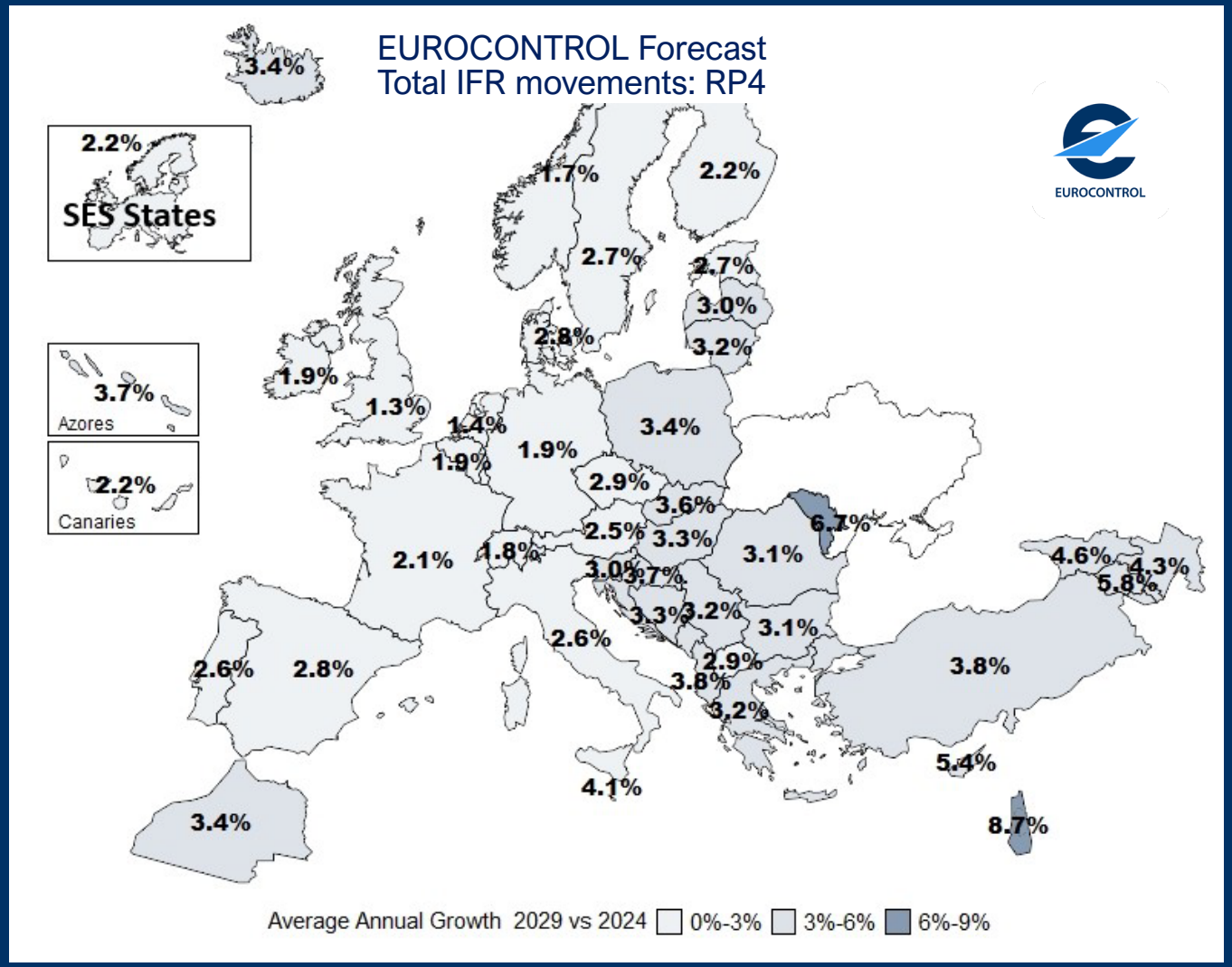
Source:
EUROCONTROL 7-Year Forecast 2025-2031, Spring 2025

EUROCONTROL Flight Forecast for RP4

Average annual growth over 2025-2029 for SES States** expected at +2.2% (±1.7pp)



- For the fourth reporting period of the Performance Scheme, flight growth is expected to average 2.2% annually (±1.6pp) between 2025 and 2029 (RP4) for the SES States, representing a slight downward revision (-0.1pp) from the previous 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.

**SES States = States involved in the Performance Scheme.

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Source:
EUROCONTROL 7-Year Forecast 2025-2031, Spring 2025

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EUROCONTROL 7-Year Forecast for Europe* 2025-2031 (Spring 2025)

Summary of IFR movements forecast

ECAC*		2019	2020**	2021	2022	2023	2024**	2025	2026	2027	2028**	2029	2030	2031	AAGR 2025-2031	AAGR RP4 2025-2029
IFR Flight Movements (Thousands)	**High**	.	.	.	.	.	10,634	11,172	11,590	12,051	12,475	12,818	13,191	13,533	**3.5%**	**3.8%**
	Base	11,085	4,979	6,231	9,238	10,144	10,634	11,024	11,301	11,503	11,725	11,883	12,063	12,222	**2.0%**	**2.2%**
	Low	.	.	.	.	.	10,634	10,846	10,979	10,938	10,957	10,911	10,888	10,856	**0.3%**	**0.5%**
Annual Growth (%) Compared to previous year.	**High**	.	.	.	.	.	4.8%	5.1%	3.7%	4.0%	3.5%	2.7%	2.9%	2.6%	**3.5%**	**3.8%**
	Base	0.8%	-55.1%	25.1%	48.3%	9.8%	4.8%	3.7%	2.5%	1.8%	1.9%	1.3%	1.5%	1.3%	**2.0%**	**2.2%**
	Low	.	.	.	.	.	4.8%	2.0%	1.2%	-0.4%	0.2%	-0.4%	-0.2%	-0.3%	**0.3%**	**0.5%**
Daily Growth (%) Compared to previous year. Removing leap year effect.	**High**	.	.	.		10%	4.5%	5.3%	3.7%	4.0%	3.2%	3.0%	2.9%	2.6%	**3.5%**	**3.9%**
	Base	0.8%	-55%	25%	48%	10%	4.5%	4.0%	2.5%	1.8%	1.6%	1.6%	1.5%	1.3%	**2.0%**	**2.3%**
	Low	.	.	.		10%	4.5%	2.3%	1.2%	-0.4%	-0.1%	-0.2%	-0.2%	-0.3%	**0.3%**	**0.6%**
Fraction of 2019 (%) Compared to 2019 level.	**High**	.	.	.	.	.	96%	101%	105%	109%	113%	116%	119%	122%	-	-
	Base	100%	45%	56%	83%	92%	96%	99%	102%	104%	106%	107%	109%	110%	-	-
	Low	.	.	.	.	.	96%	98%	99%	99%	99%	98%	98%	98%	-	-

* ECAC is the European Civil Aviation Conference

** leap year

Source:
EUROCONTROL 7-Year Forecast 2025-2031, Spring 2025

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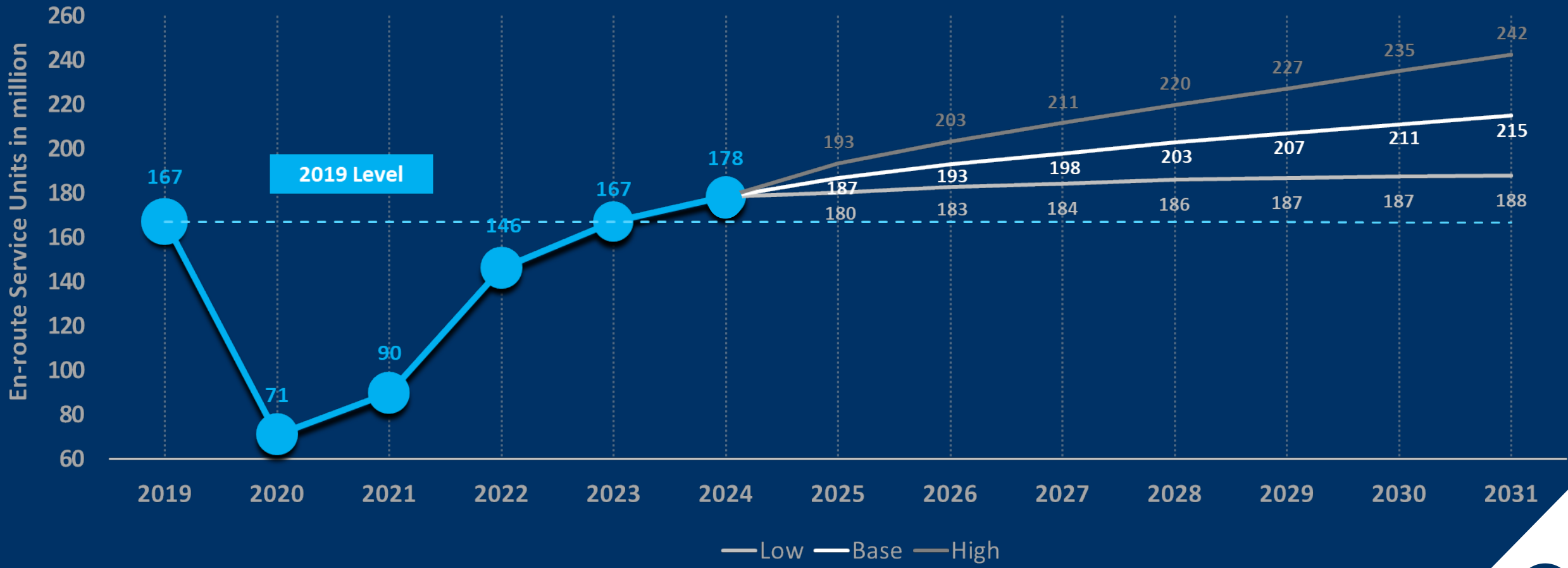
EUROCONTROL 7-Year Forecast for CRCO Region° 2025-2031 (Spring 2025)

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 2025-2031, Spring 2025

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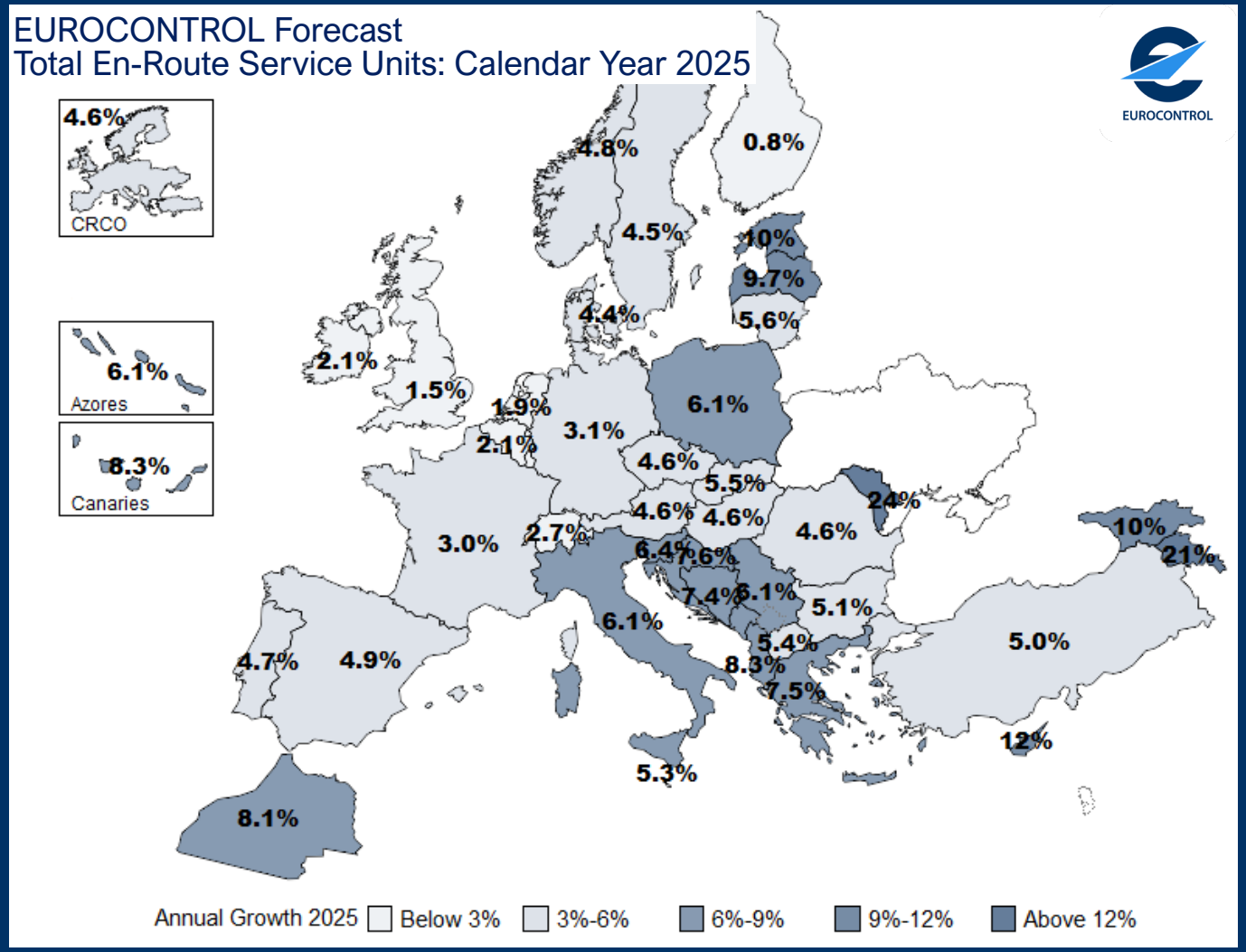
EUROCONTROL TSU Forecast for 2025

Upwards revision for CRCO° to +4.6% (±3.8pp), compared to the Autumn 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, TSU are expected to reach **186.6 million** within the projected **4.6%** growth for Europe in **2025** (total terms) but local disparities remain:

- **Baltic States** (Estonia, Latvia and Lithuania) are revised upwards thanks to the recovery of some traffic to and from China as well as by strong traffic from the Russian Federation (both domestic and to and from Türkiye) but they will continue to face challenges while the war in Ukraine continues.
- **Finland** is revised downwards due to a shift of traffic to Asia more towards the Baltic States.
- **South and South-Eastern Europe** is expected to experience stronger growth, driven by tourist flows to Mediterranean destinations and flows to and from Asia and the Middle East.
- **UK and Ireland** are revised downwards due to shift of traffic between Europe and North-America towards **Norway** that has been consequently revised upwards.

Source:
EUROCONTROL 7-Year Forecast 2025-2031, Spring 2025

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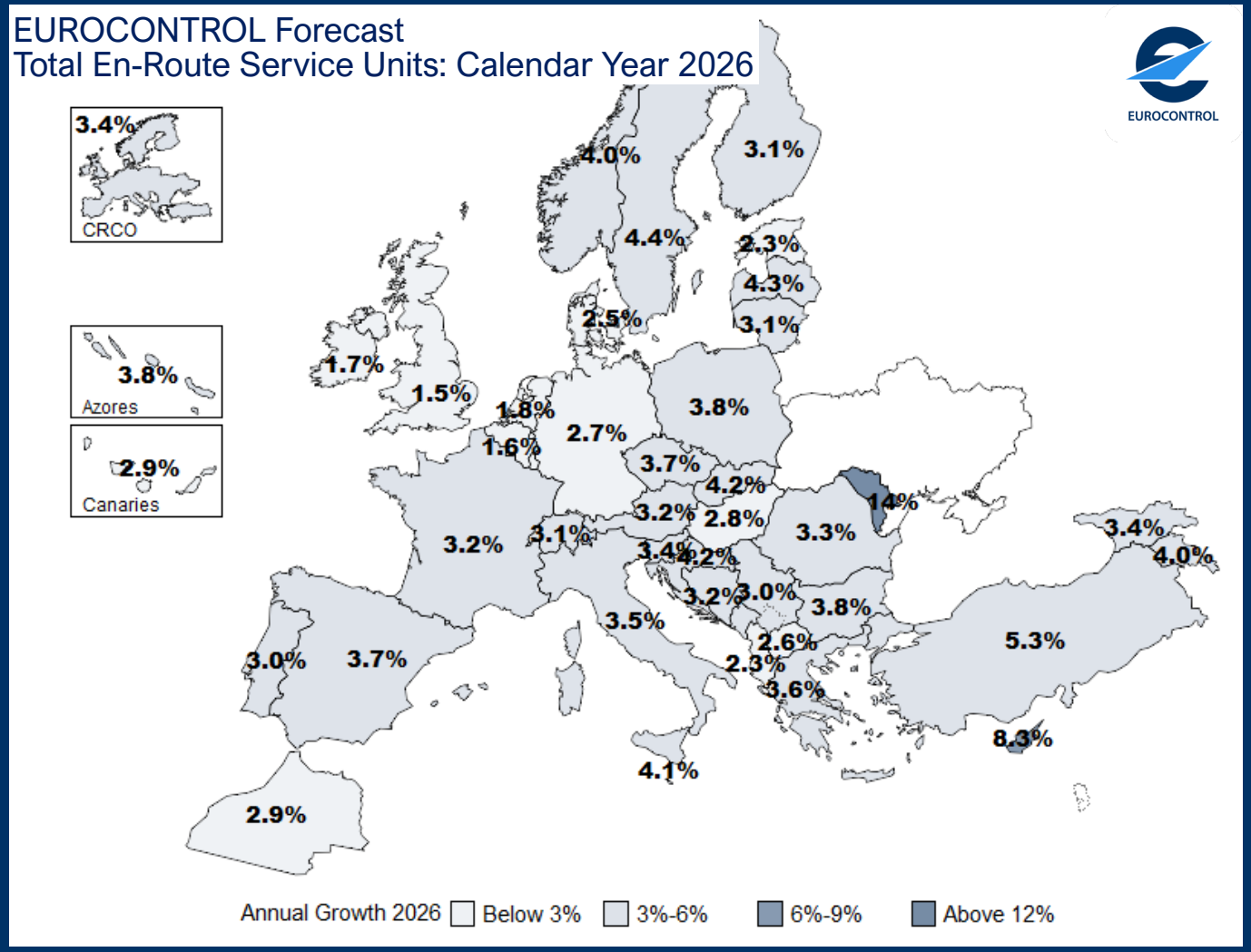
EUROCONTROL TSU Forecast for 2026

CRCO° is expected to grow by +3.4% (±1.9pp for low-to-high range)



- The second year of the forecast also shows a revision upwards compared to the Autumn 2024 forecast.
- In 2026, Total en-route Service Units are expected to reach **193.0 Million** in the base scenario for the CRCO° Region vs. **189.9 Million** in the Autumn 2024 forecast.
- Local disparities will remain with more growth in the East and South of Europe, but the differences are expected to reduce, and growth rates are to become more homogeneous.
- **Large uncertainties exist due to the volatility of traffic and the route flexibility around the smallest States of Europe**

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Source:
EUROCONTROL 7-Year Forecast 2025-2031, Spring 2025

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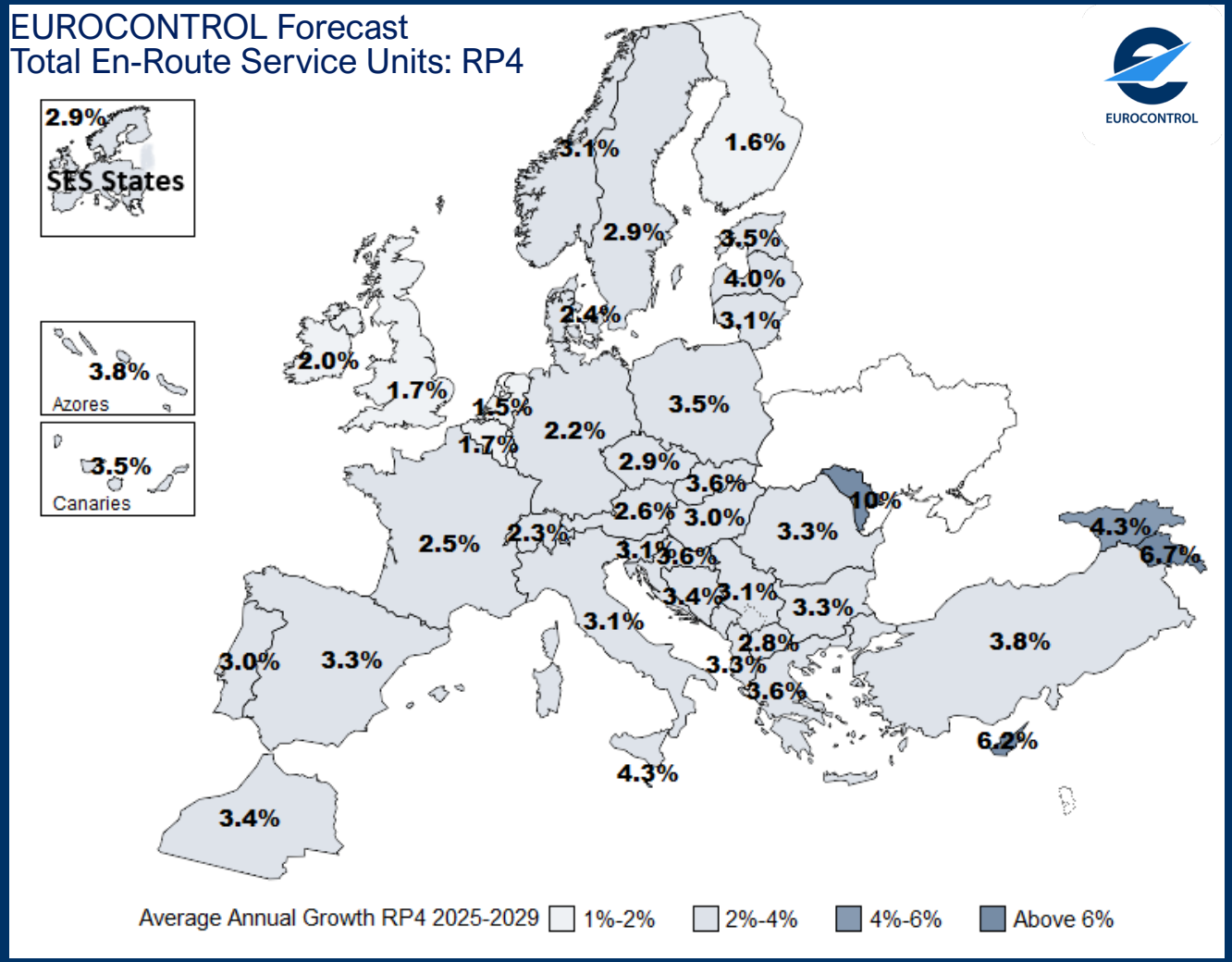
EUROCONTROL TSU Forecast for RP4

Average annual growth over 2025-2029 for SES States** expected at +2.9% (±2.0pp)



- By 2029, the TSU growth is expected to become more homogeneous between Eastern and Western States of Europe with revisions compared to the Autumn 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.

**SES States = States involved in the Performance Scheme.

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Source:
EUROCONTROL 7-Year Forecast 2025-2031, Spring 2025

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EUROCONTROL 7-Year Forecast for CRCO Region° 2025-2031 (Spring 2025)

Summary of En Route Service Units Forecast

CRCO°		2019	2020*	2021	2022	2023	2024*	2025	2026	2027	2028*	2029	2030	2031	AAGR 2025-2031	AAGR RP3 2020-2024	AAGR RP4 2025-2029
En-route Service Units (Thousands)	**High**	.	.	.	.	.	.	193,301	203,353	211,455	219,841	227,051	234,917	242,400	**4.5%**	.	**4.9%**
	Base	167,000	70,828	89,680	146,221	166,751	178,358	186,639	193,007	197,716	202,743	206,683	211,021	215,051	**2.7%**	**1.3%**	**3.0%**
	Low	.	.	.	.	.	.	180,042	182,776	184,241	186,051	186,592	187,420	187,984	**0.8%**	.	**0.9%**
Annual Growth (%) Compared to previous year	**High**	.	.	.	.	.	.	8.4%	5.2%	4.0%	4.0%	3.3%	3.5%	3.2%	**4.5%**	.	**4.9%**
	Base	6.1%	3%	27%	63%	14%	7.0%	4.6%	3.4%	2.4%	2.5%	1.9%	2.1%	1.9%	**2.7%**	**1.3%**	**3.0%**
	Low	.	.	.	.	.	.	0.9%	1.5%	0.8%	1.0%	0.3%	0.4%	0.3%	**0.8%**	.	**0.9%**
Daily Growth (%) Compared to previous year (Removing leap year effect).	**High**	.	.	.	.	.	.	8.7%	5.2%	4.0%	3.7%	3.6%	3.5%	3.2%	**7.5%**	.	**5.0%**
	Base	2.8%	-58%	27%	63%	14%	6.7%	4.9%	3.4%	2.4%	2.3%	2.2%	2.1%	1.9%	**2.7%**	**1.3%**	**3.0%**
	Low	.	.	.	.	.	.	1.2%	1.5%	0.8%	0.7%	0.6%	0.4%	0.3%	**0.8%**	.	**1.0%**
Fraction of 2019 (%) Compared to 2019 level.	**High**	.	.	.	.	.	.	116%	122%	127%	132%	136%	141%	145%	.	.	.
	Base	100%	42%	54%	88%	100%	107%	112%	116%	118%	121%	124%	126%	129%	.	.	.
	Low	.	.	.	.	.	.	108%	109%	110%	111%	112%	112%	113%	.	.	.
SES-RP3/RP4°°		**2019**	**2020***	**2021**	**2022**	**2023**	**2024***	**2025**	**2026**	**2027**	**2028***	**2029**	**2030**	**2031**	**AAGR 2025-2031**	**AAGR RP3 2020-2024**	**AAGR RP4 2025-2029**
En-route Service Units (Thousands)	**High**	.	.	.	.	.	.	142,559	149,846	155,743	161,686	166,699	172,142	177,224	**4.3%**	.	**4.8%**
	Base	125,206	52,595	66,991	108,508	122,491	131,637	137,714	142,259	145,615	149,172	151,917	154,943	157,692	**2.6%**	**1.0%**	**2.9%**
	Low	.	.	.	.	.	.	133,001	134,898	135,803	137,008	137,276	137,742	137,989	**0.7%**	.	**0.8%**
Annual Growth (%) Compared to previous year	**High**	.	.	.	.	.	.	8.3%	5.1%	3.9%	3.8%	3.1%	3.3%	3.0%	**4.3%**	.	**4.8%**
	Base	6.1%	3%	27%	62%	13%	7.5%	4.6%	3.3%	2.4%	2.4%	1.8%	2.0%	1.8%	**2.6%**	**1.0%**	**2.9%**
	Low	.	.	.	.	.	.	1.0%	1.4%	0.7%	0.9%	0.2%	0.3%	0.2%	**0.7%**	.	**0.8%**
Daily Growth (%) Compared to previous year (Removing leap year effect).	**High**	.	.	.	.	.	.	8.6%	5.1%	3.9%	3.5%	3.4%	3.3%	3.0%	**4.4%**	.	**4.9%**
	Base	2.8%	-58%	28%	62%	13%	7.2%	4.9%	3.3%	2.4%	2.2%	2.1%	2.0%	1.8%	**2.7%**	**1.0%**	**3.0%**
	Low	.	.	.	.	.	.	1.3%	1.4%	0.7%	0.6%	0.5%	0.3%	0.2%	**0.7%**	.	**0.9%**
Fraction of 2019 (%) Compared to 2019 level.	**High**	.	.	.	.	.		114%	120%	124%	129%	133%	137%	142%	.	.	.
	Base	100%	42%	54%	87%	98%	105%	110%	114%	116%	119%	121%	124%	126%	.	.	.
	Low	.	.	.	.	.		106%	108%	108%	109%	110%	110%	110%	.	.	.

° 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 2025-2031, Spring 2025

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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.

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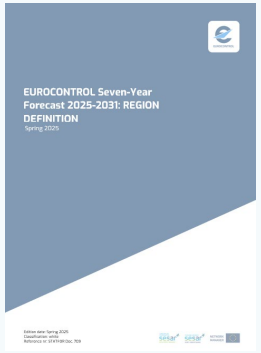
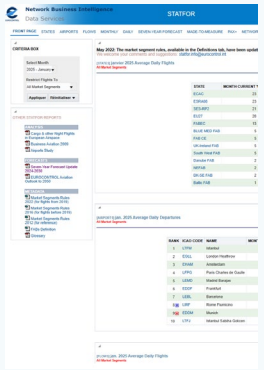
Useful links

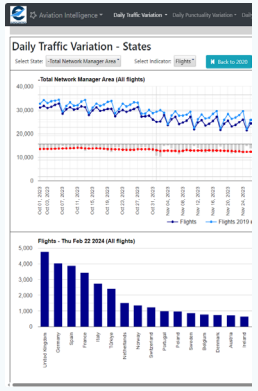


A presentation of the geographical definitions can be found in
Annex - Traffic Region Definitions



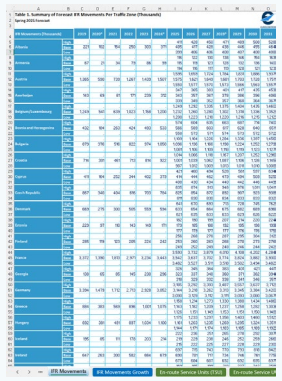
Connect to the

STATFOR Interactive Dashboard



Connect to the

Aviation Intelligence Dashboard



The forecast per State or group of States 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 r their business.

Google Play Apple Store