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EUROCONTROL FORECAST UPDATE 2025-2031

Autumn 2025

CONSORTIUM COORDINATOR sesar DEPLOYMENT MANAGER

FOUNDING MEMBER sesar JOINT UNDERTAKING

NETWORK MANAGER

Summary

- This **Seven-Year Forecast (Autumn 2025)** builds on the February 2025 publication and integrates the most recent flight trends and route patterns, including data from summer 2025. It also includes a partial update of forecast inputs, such as the GDP forecast and low-cost market shares.
- Since the February 2025 forecast, European flight numbers have been overall aligned with the base scenario. Locally, there have been significant changes on overflights in certain central and north-western European states, driven by variations on unit rates, fewer airspace capacity constraints, and the impact on the network of various ongoing conflicts.
- For 2025, the **expected number of flights in the ECAC** (European Civil Aviation Conference) **area is 11.0 million**, reflecting growth of 3.6% (±0.6pp) compared to 2024 (99% of 2019 levels). This is broadly in line with the February 2025 traffic forecast at European level. States in south-west and south-east Europe are experiencing the highest growth rates.
- **For 2026, traffic is expected to grow by 3.1% (±1.7pp) to reach 11.4 million flights**. This reflects the 2025 outturn, sustained growth expected for winter 2025/26, and a resilient economic outlook. Annual traffic should return to pre-pandemic levels at European level, but with notable variations at State level. This is an **upwards revision compared to the February 2025 forecast publication**.
- Average **annual flight growth is expected to be +2.2%** (±1.6pp) for the period 2025-2031, reaching **12.4 million flights at the end of the horizon** in the base scenario. This represents a **slight upward revision from the February 2025 forecast**.
- For the States involved in the SES Performance Scheme, flight growth has been revised upwards to 2.5% annually (±1.6pp) between 2025 and 2029 (RP4).
- 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.
- EUROCONTROL’s Forecasts are prepared on a regular basis by the STATFOR team within our Aviation Intelligence Unit. The next forecast update is expected in Spring 2026.

* ECAC is the European Civil Aviation Conference

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This 7-Year Forecast Update covers the 2025-2031 period

This Update replaces the February 2025 forecast, and takes into account the following inputs:

Traffic trends up to September 2025
European traffic recorded sustained growth over the winter and throughout the summer. Aggregate flight numbers during the peak season recovered to 2019 levels, led in particular by dynamic tourist flows to the Mediterranean and the strong growth of intercontinental flows. However, the network remains heavily impacted by ongoing geopolitical conflicts which continue to disrupt airline plans, airspace usage and require rerouted traffic flows.

Partial update of the forecast inputs
Several inputs have been reviewed for this publication, including: an update of the economic forecast from Oxford Economics (August 2025); considerations for upcoming events; adjustments to airport capacities; and an update of the low-cost market share based on the latest data. All other inputs remain consistent with those used in the February 2025 publication

Overflights
Routing patterns between September 2024 and August 2025, combined with recent trends in State overflights, are used as the basis for forecasting future overflight activity.

Technical assumption on routings over the 2025-2031 period
It is impossible to predict when currently restricted airspaces will be fully reopened. This Update 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.

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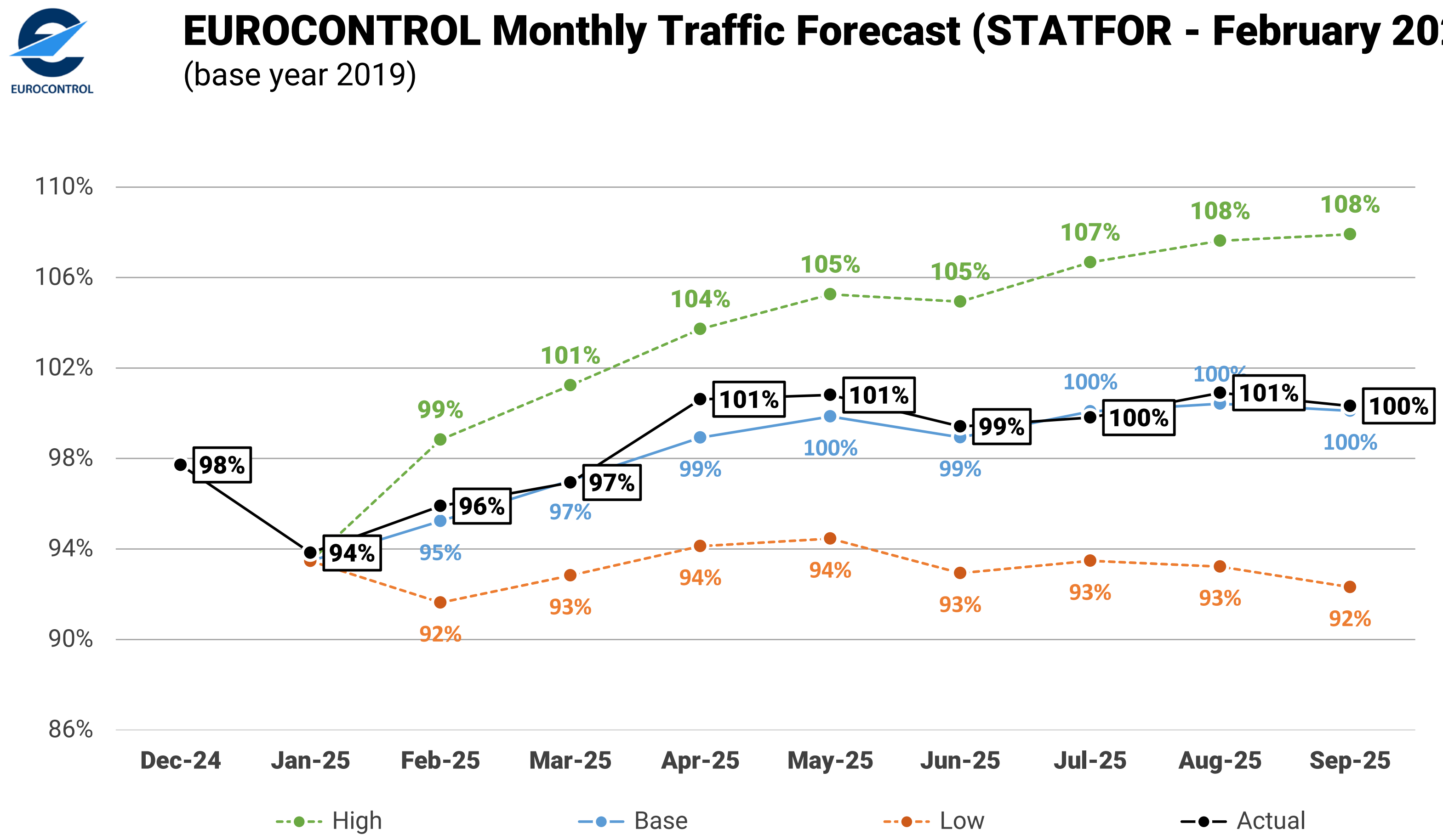
Flight Trends

Total traffic in Europe (ECAC) aligned with February 2025 forecast



- The number of flights was in line with the base scenario of the February 2025 forecast during **February and March**.
- Traffic was slightly above the forecast during **April and May** due to calendar effects in the forecast, and higher-than-expected demand at the start of the IATA summer season.
- Actual traffic figures were aligned with the base scenario of the February 2025 forecast during the peak summer months (**June to September**).

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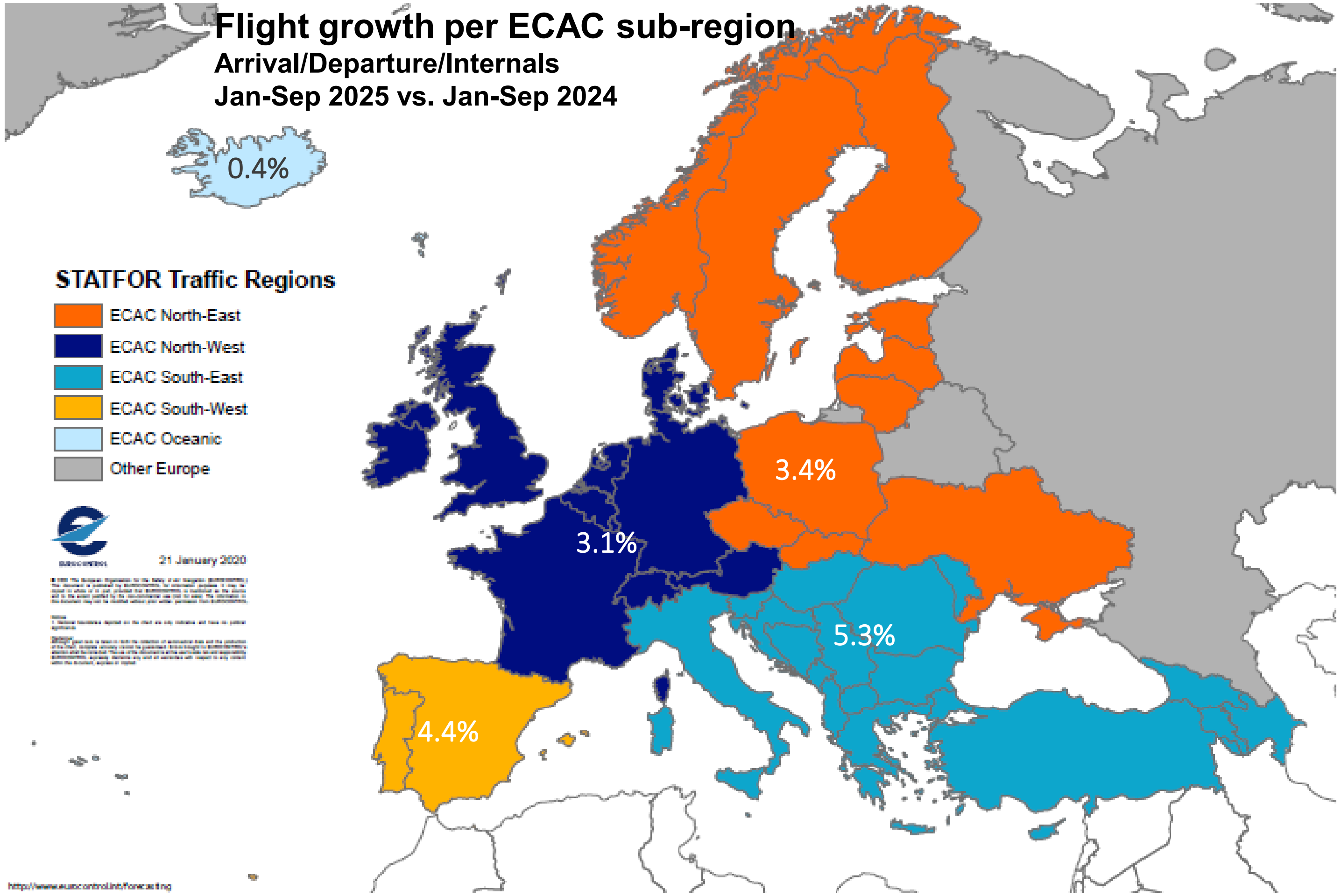
Flight Trends

Since the beginning of 2025, IFR movements have experienced 3.5% growth, reaching 99% of pre-pandemic 2019 levels



- Flights in ECAC States reached **2019 traffic levels** in April 2025, despite notable local variation.
- **Growth in southern Europe**: strong demand observed in summer tourist destinations, notably in Spain, Portugal, Italy and Greece.
- **Central and eastern European** states recorded strong growth, with a major expansion by low-cost carriers in the region.
- Dynamic **Intercontinental flows** were well above 2019 levels despite the ongoing geopolitical challenges.
- The long-term decline in **domestic flows** continues.

Flows beyond Europe

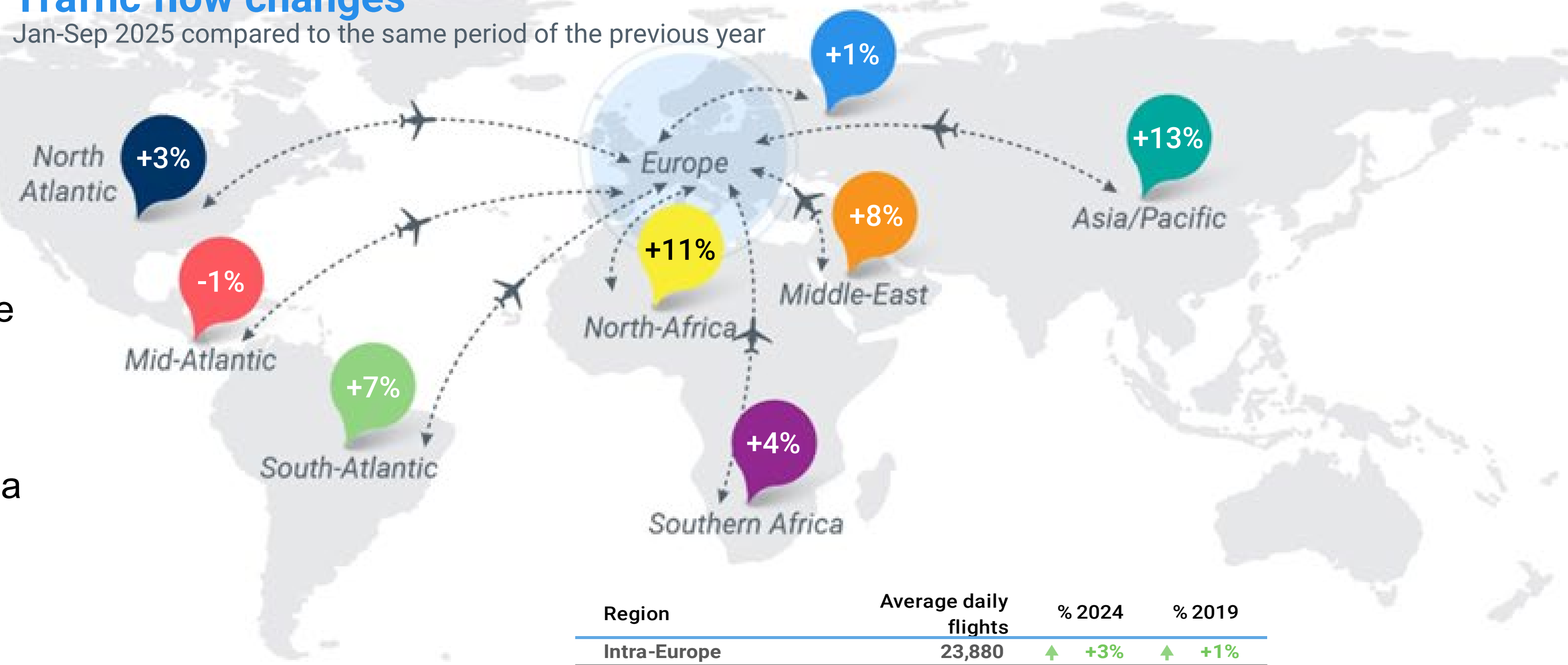
Moderate to strong year-on-year growth in virtually all flows, with considerable growth since 2019 in many except those impacted by the geopolitical conflicts.

Compared to 2024,

- flows to/from **Asia/Pacific** and **North Africa** have experienced strong growth (with both well above 2019 levels as well)
- flows to/from the **Middle East** are firmly up despite regional tensions (+8%, and +4% vs 2019).
- While airspace unavailability has affected European airlines' competitiveness on flows to Asia (and to a lesser extent the Middle East), traffic remains up vs 2024 in both cases.
- Traffic with **North America** is stable (+3%) growth despite uncertainties on the geopolitical and economic situation (and considerably up vs 2019 by +16%).
- **Intercontinental** traffic is growing faster than **intra-European**, with airlines investing in new long-distance destinations.

Traffic flow changes

Jan-Sep 2025 compared to the same period of the previous year



Region	Average daily flights	% 2024	% 2019
Intra-Europe	23,880	+3%	+1%
Europe ↔ Middle-East	1,493	+8%	+4%
Europe ↔ North Atlantic	1,417	+3%	+16%
Europe ↔ North-Africa	1,364	+11%	+32%
Europe ↔ Asia/Pacific	907	+13%	+17%
Europe ↔ Other Europe	383	+1%	-64%
Europe ↔ Southern Africa	313	+4%	+2%
Europe ↔ South-Atlantic	205	+7%	+10%
Europe ↔ Mid-Atlantic	176	-1%	+1%
Non Intra-Europe	6,258	+7%	+1%

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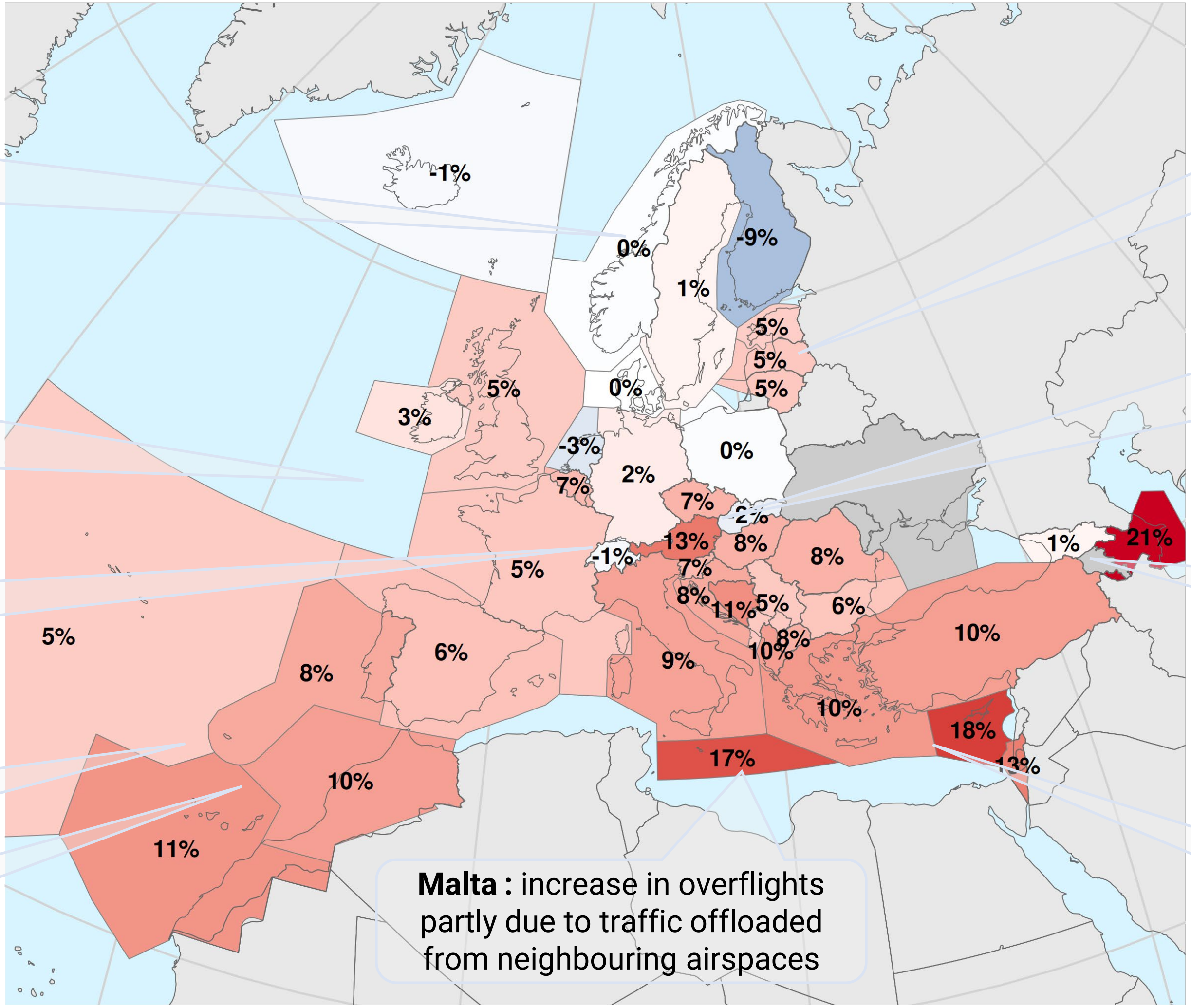
Overflights Trends

Ongoing conflicts and changes in Unit Rates have impacted routes

Traffic Zone (based on FIR) % Overflights variation Jan-Sep 2025 vs Jan-Sep 2024



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Scandinavia: shift of transatlantic flows more West bringing less flights over **Norway**, **Sweden** and **Denmark.**

Western Europe: shift of transatlantic flows more west bringing more flights and Service Units over **UK, Ireland, France, Portugal and Spain.**

Netherlands and **Switzerland** Less overflights following a significant increase of Unit Rates.

Portugal and **Morocco** : increased overflights due to dynamic flows to the Canaries

Strong flows from South America increasing overflights in the **Canaries.**

Malta : increase in overflights partly due to traffic offloaded from neighbouring airspaces

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

Central Europe : increase of the Unit Rates in **Slovakia** and **Switzerland** and reduction of airspace constraints led to strong traffic increases in **Austria.**

South Caucasus and Türkiye: significant increase of flows from South-East Asia and Middle-East with a strong number overflights over **Armenia** (99% increase).

Greece and Cyprus: more growth than expected due to a stronger recovery of traffic to Israel.

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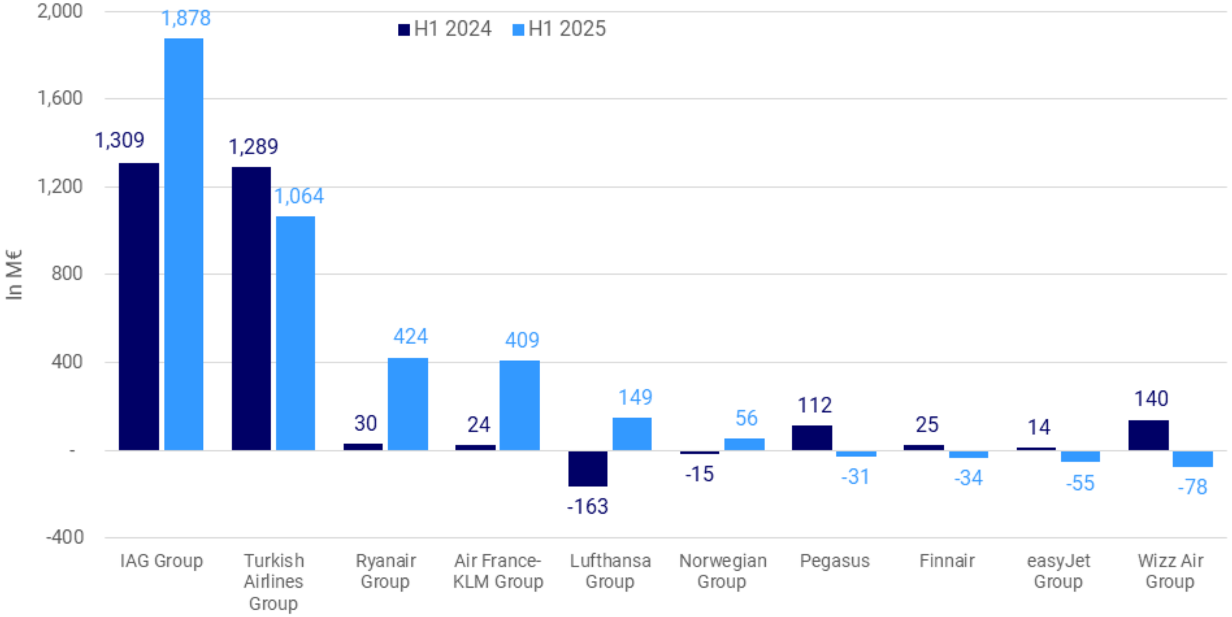
Airline Operations

Airline profits influenced by operational challenges

Operating profits of airlines

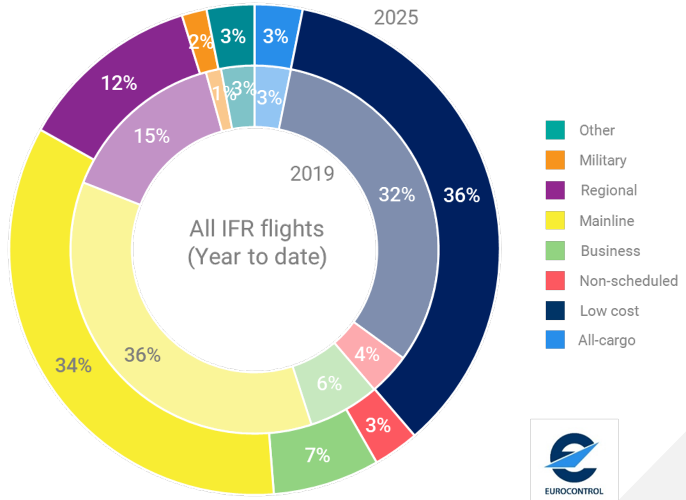
In M€ covering the first half of 2024 and 2025
Airline Groups with reported profits, selected amongst the 15 busiest in Europe



- **Operating results:** Four groups were strongly in the black in H1 2025. IAG Group reported strong operating results, with a substantial increase on 2024. Ryanair and Air France-KLM have recovered significantly in H1 2025 while Turkish Airlines continued with a strong performance, albeit down on H1 2024.
- However, profits are down in almost half of all major airline groups, with four dropping into the red in H1 2025, reflecting current challenges in the industry linked inter alia to aircraft availability and geopolitical instability.

- **Load Factors** have remained stable at 86% in Q2 compared to Q2 2024 (*IATA*).
- **Fleet** : As anticipated in previous forecasts, the issues with aircraft engines have forced airlines to **ground part of their fleet** for mandatory maintenance.
- This, coupled **with delays in aircraft deliveries**, slowed down airlines expansion plans. Fleet issues are expected to continue in 2026.
- The **market share of the Low-Cost** segment has increased since pre-covid levels, surpassing Mainline as the main segment. **Italy, Morocco, Romania** are amongst the states with the highest increase.
- **Expansion of Low-Cost further East :** certain low-cost airlines strengthened their networks in Central Europe and the Balkans and plan for further expansion in 2026.

Average share of total flights (year to date)



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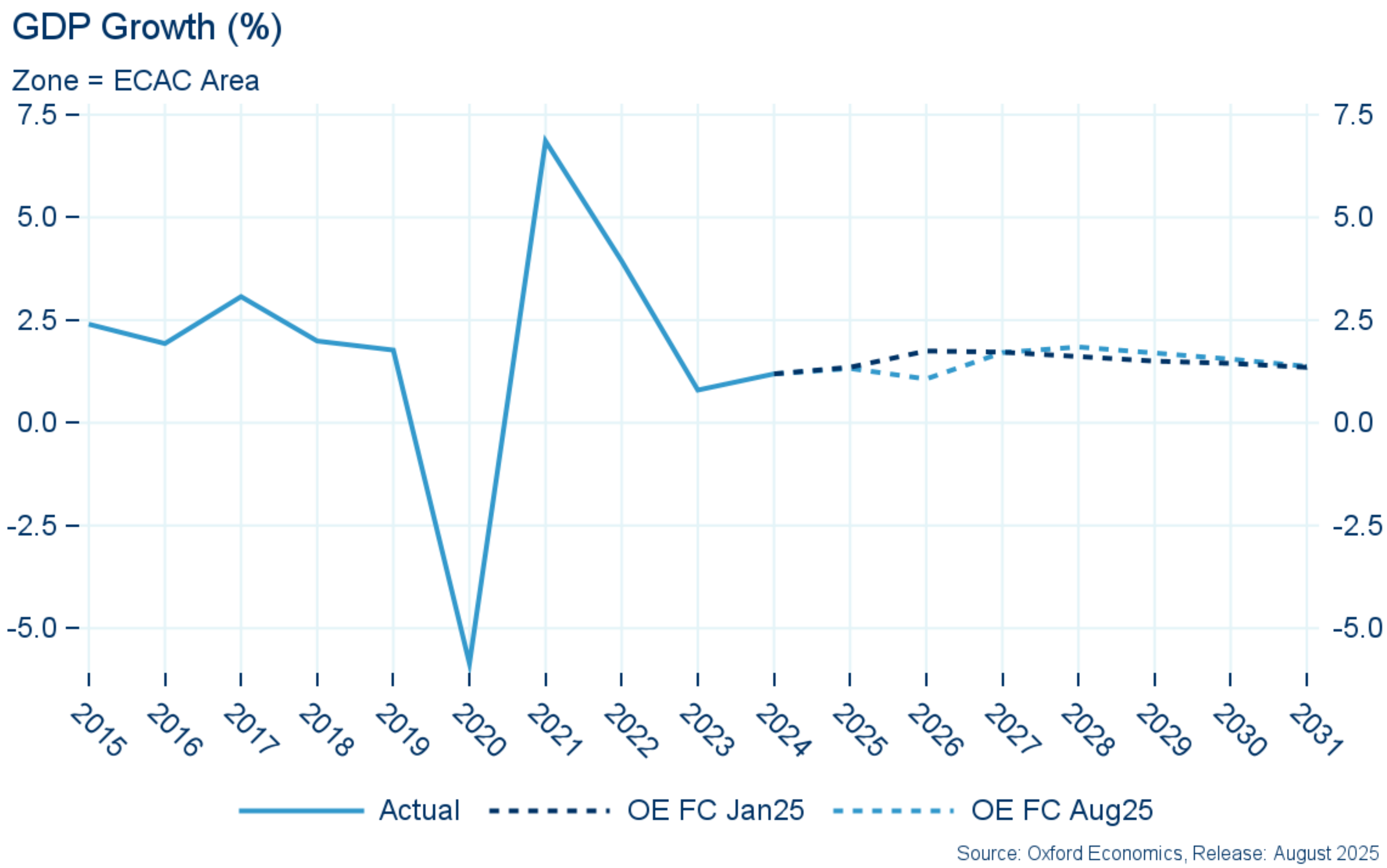
Economic Growth Outlook (2025-2031)

Stable outlook, but uncertainty remains high across regions



- The European economy has **avoided recession**, showing resilience despite past inflation and tight monetary policy.
- GDP growth remains **modest but stable** over the forecast horizon, with only a slight moderation in 2026.
- Lower energy prices and easing inflation are **supporting household consumption and investment**.
- **Uncertainty however remains high**, linked to geopolitical tensions, global trade, and policy adjustments.

Implications for Forecast:

- GDP trends remain **consistent with the upward revision** in the flight forecast.
- The small 2026 adjustment does **not affect the overall positive trajectory**.

*The next slides explore the **regional and global growth patterns** underpinning this resilience.*

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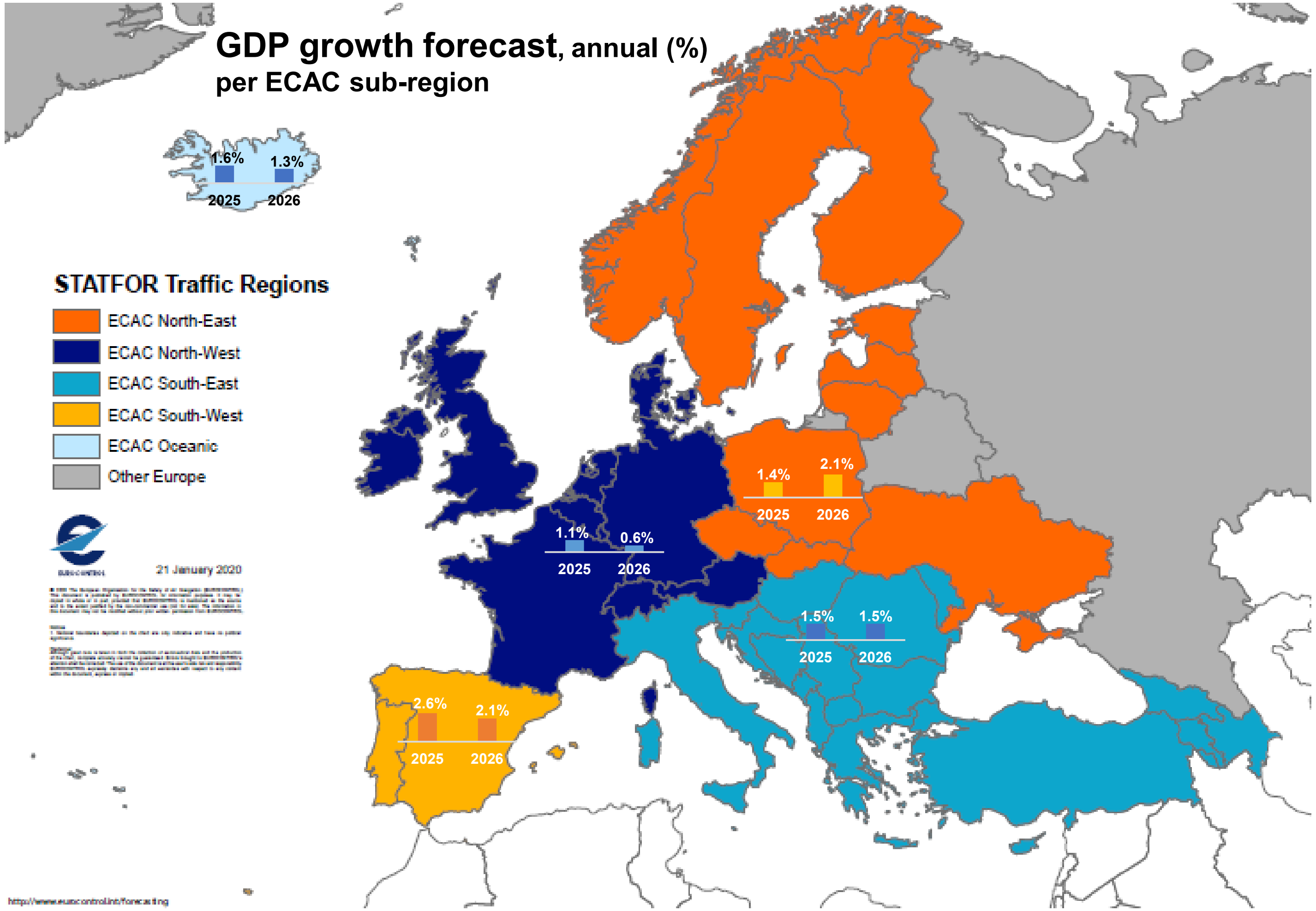
Regional Economic Growth Divergence

Southern and eastern Europe are driving growth



Source: Oxford Economics, Release: August 2025

Growth remains uneven across Europe.

- **Stronger growth in southern and eastern Europe** (notably Spain, Armenia, Albania, Türkiye and Georgia).
- **Moderate growth in western Europe** (including France, Germany, and Belgium)

Implications for Forecast:

- Stronger GDP outlook in dynamic regions supports **higher short and medium-term traffic levels**.
- Sustained tourism activity underpins the **upward revision in the base scenario**.
- Regional diversity is contributing to the **overall resilience of the forecast**.

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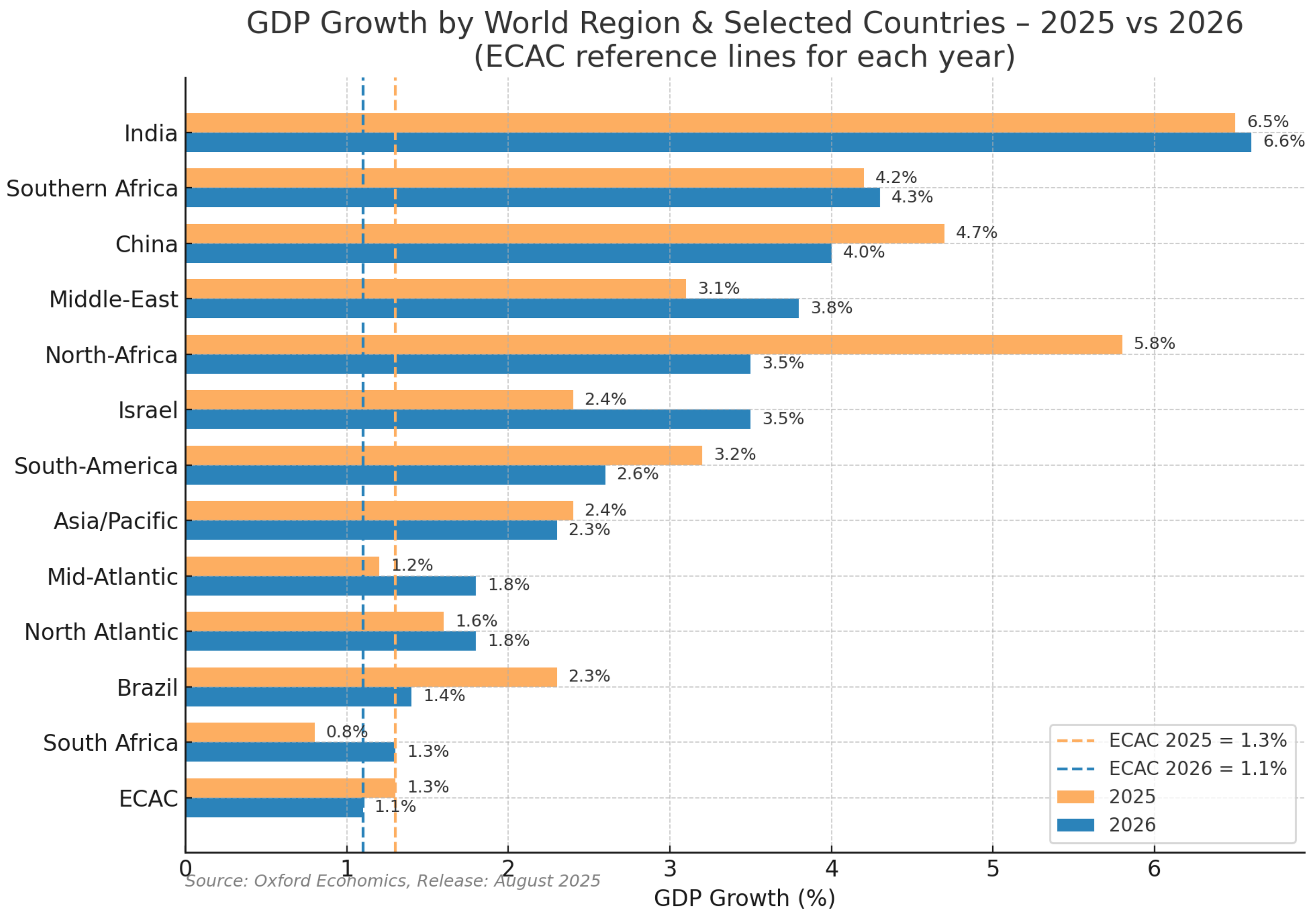
Economic Growth outside ECAC

Global growth is expected to remain uneven, with stronger performance outside Europe



- **Non-ECAC regions** show **higher GDP growth** than Europe in both 2025 and 2026.
- **Middle East** and **Africa** lead with growth above **3-4 %**, while **ECAC** stays close to **1 %.**
- **North Atlantic** and **the Mid-Atlantic** show moderate but improving growth.
- **Asia/Pacific** and **South America** continue to expand at a steady pace.

Implications for Forecast:

- **Higher growth outside Europe** strengthens **external demand.**
- **Dynamic emerging markets** support the **recovery of long-haul traffic** to major hubs.
- These trends contribute to a **more positive outlook** for flight activity in our new forecast.

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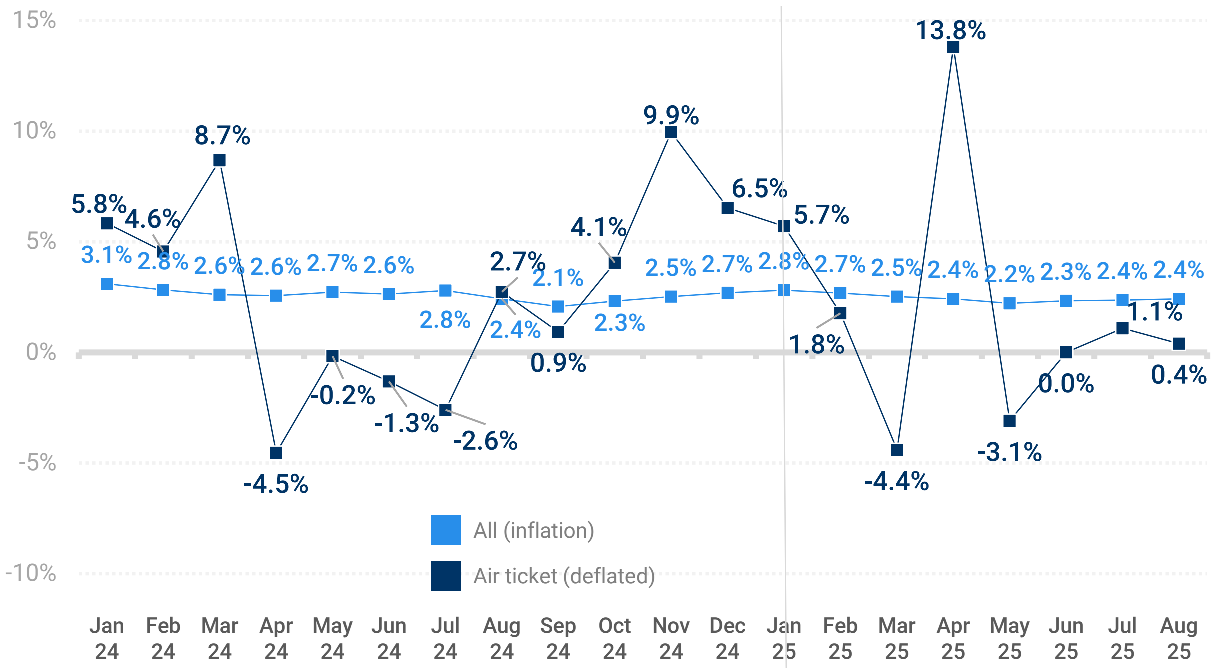
Ticket prices

Air ticket prices are rising slower than inflation, while demand remains resilient

Price change per month (EU27)

Values compared to the same month of the previous year



Source: EUROSTAT

- Between **January and August 2025**, air ticket prices increased by **1.7%**, compared with **2.7% inflation** over the same period.
- Despite a **moderate economic environment**, **air travel demand continues to increase**, showing strong **consumer appetite for travel**.
- The **limited rise in ticket prices** suggests airlines are maintaining **competitive pricing strategies** to support traffic recovery.
- This resilience in demand, even as prices remain above pre-pandemic levels, supports our **upward revision of flight numbers** in this forecast for 2026.

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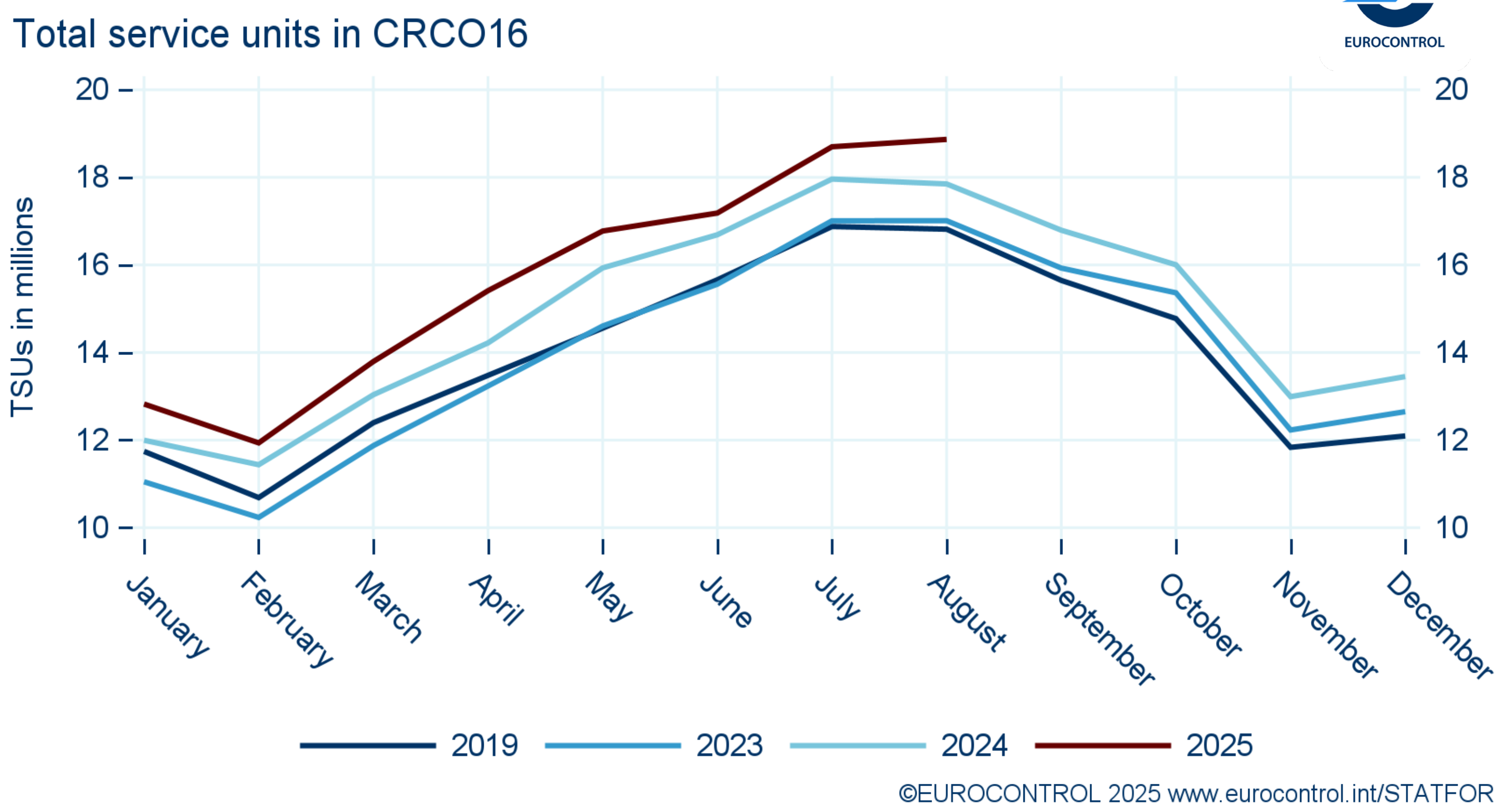
En-Route Service Units Trends

Mainly driven by flight trends, these stand between the Base and High forecast of February 2025



- From January to August, actual Total en-route service units stand close to **112%** of 2019 figures.
- This represents a growth of **5.4%** compared to 2024 values.
- Lower growth in June 2025 reflects a high number of re-routings as tensions with Iran pushed Middle Eastern flights westwards, with numbers in June from/to Israel dropping.
- This generated stronger en-route Service Units in the Balkans, Greece and Malta, but a drop for Hungary, Romania, Bulgaria, Cyprus and Türkiye.

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En Route Service Units Trends

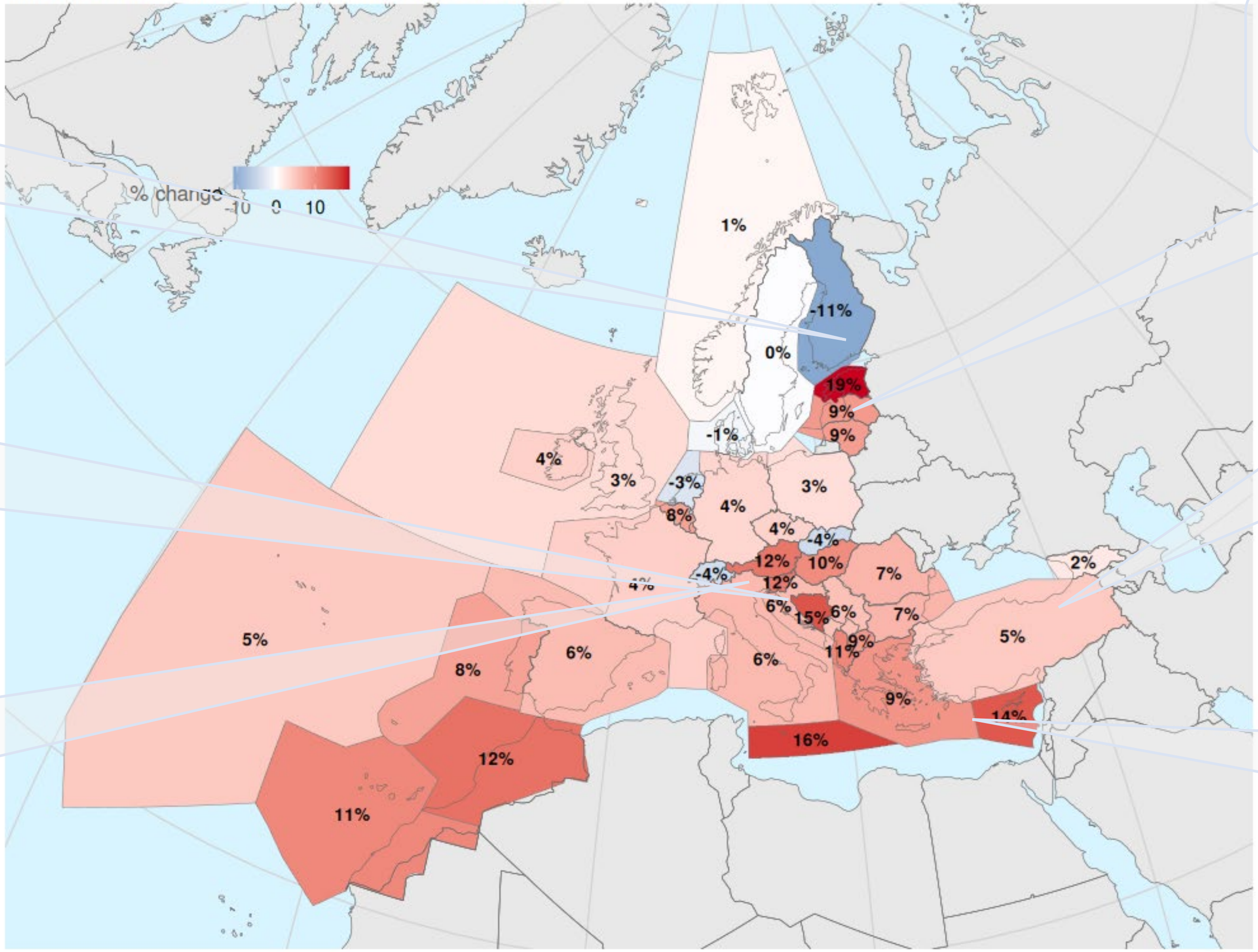
These mirror the trend in overflights, plus a few deviations linked to weights and distances

Finland: A strong decline of overflights combined with decreased distance flown/overflights has led to lower growth than for flights.

Balkan States: the traffic shift to the west led to increases in distance flown over states such as **Bosnia-Herzegovina** and decrease in distances for **Croatia**, which affected the growth of service units compared to the growth of the flights.

Balkan States: Average weights also increased in the Balkans, especially in **Slovenia**. Such changes generate differences in growth between En-route Service Units and flights

En-route Service Units Jan-Aug 2025 vs Jan-Aug 2024



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Baltic states: Increased overflights but also increased weights generating more growth for En-route Service Units, and increased distance as well for **Estonia**.

Türkiye: less growth than that of overflights as traffic patterns were strongly affected by the conflict in the Middle-East with shorter distances flown

Greece and Cyprus: less growth than flights. Recovery of flows to Israel, flown with lighter aircraft

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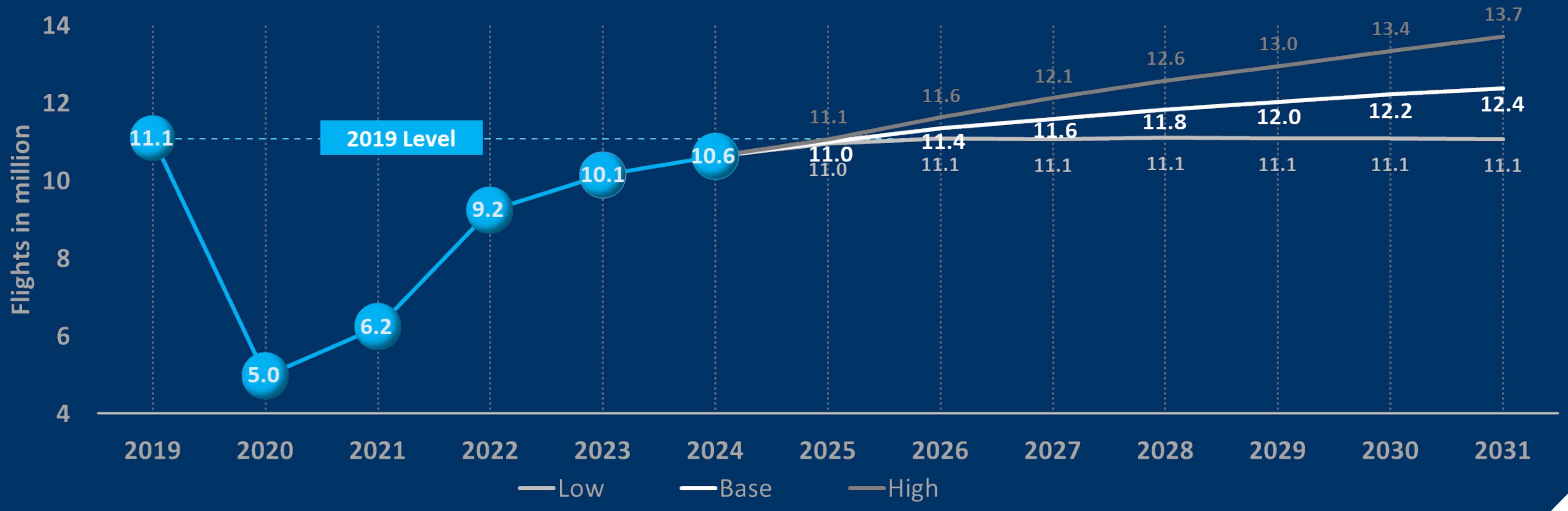
EUROCONTROL 7-Year Forecast Update for Europe* 2025-2031 (Autumn 2025)

Actual and future IFR movements

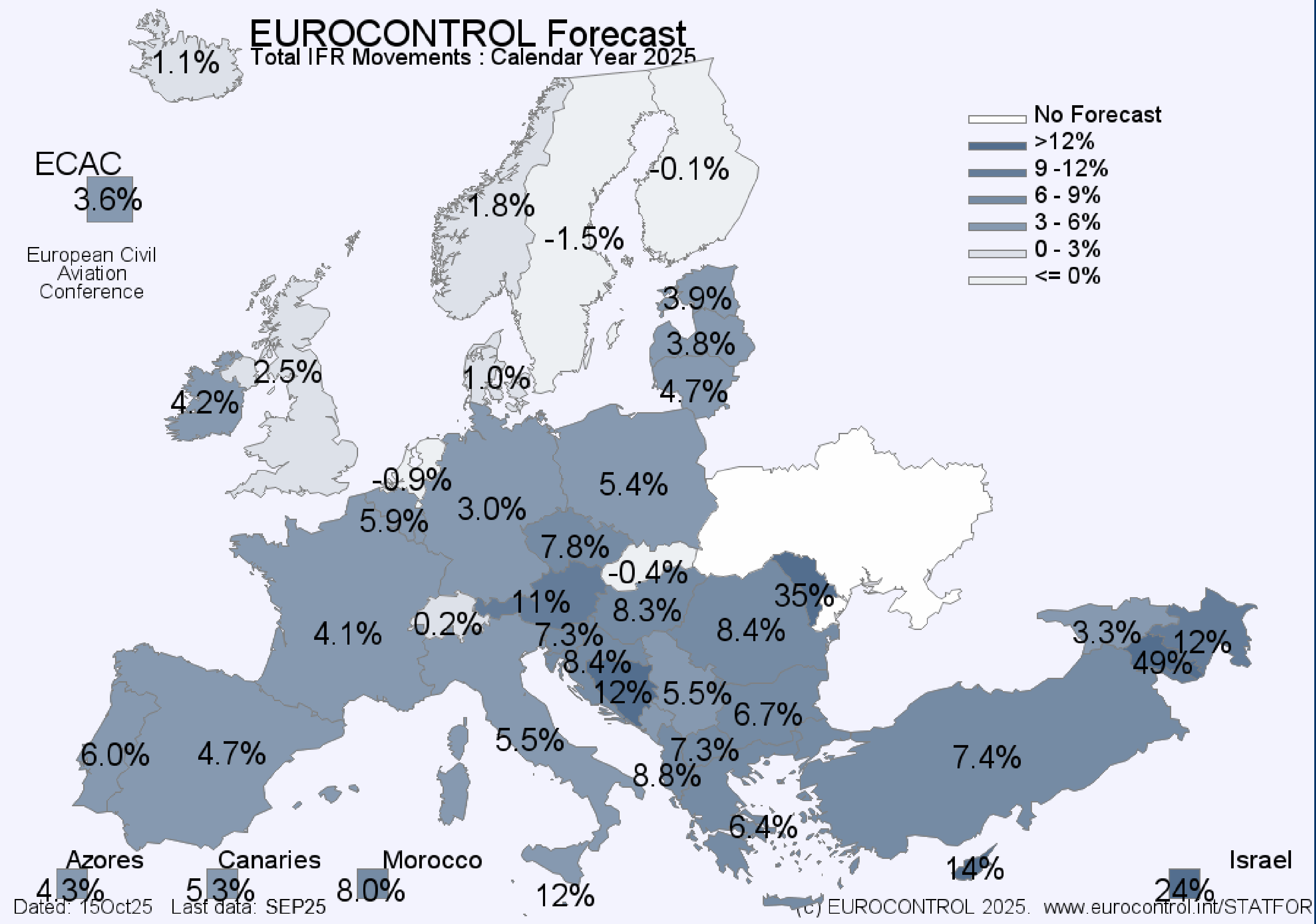


* Europe = ECAC 44 Member States

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

EUROCONTROL Flight Forecast Update for 2025

A revision for ECAC to +3.6% (±0.6pp), in line with the February 2025 forecast at network level.



- Europe is forecasted to achieve flight growth of 3.6% in 2025 (base scenario).
- **Changes in overflight trends** are influencing growth in states in central Europe, Scandinavia and the Baltic States.
- Sustained leisure demand to travel to the **Mediterranean States** remains a main growth engine.
- Strong extra-European flows impacting growth, notably in the **south-east states.**

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

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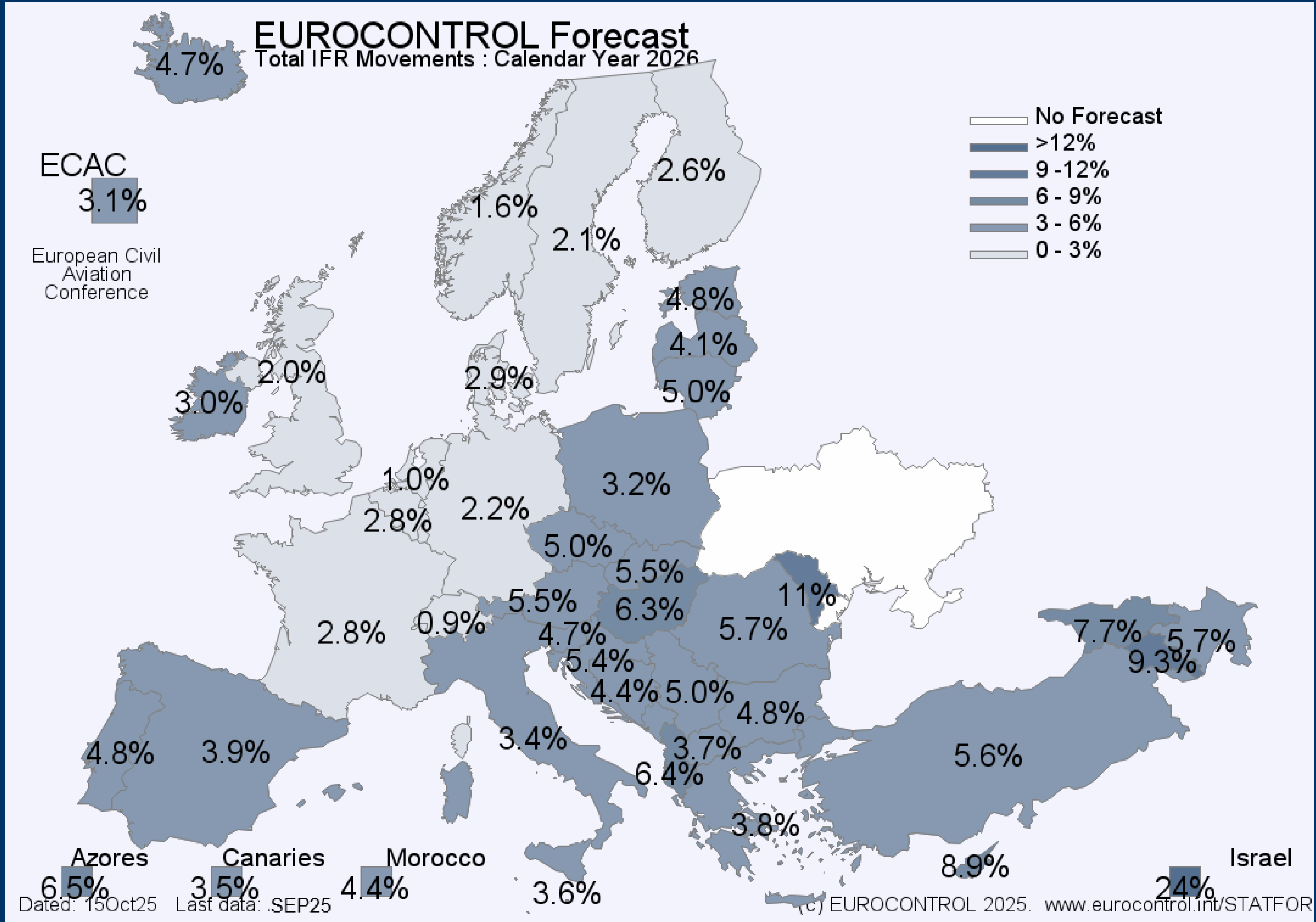
EUROCONTROL Flight Forecast Update for 2026

ECAC +3.1% (±1.9pp for low-to-high range)



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- Europe is forecasted to achieve flight growth of 3.1% in 2026 (base scenario).
- This reflects the 2025 outturn; sustained growth expected for Winter 2025/26; and a resilient economic outlook
- The arrival/departure trends observed in 2025 are expected to continue next year. However, more moderate growth rates are predicted for Summer 2026
- At an annual level, **the ECAC area is expected to attain global 2019 traffic levels** next year; however, traffic levels vary considerably at individual State level
- This is an **upwards revision from the February 2025 forecast**

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

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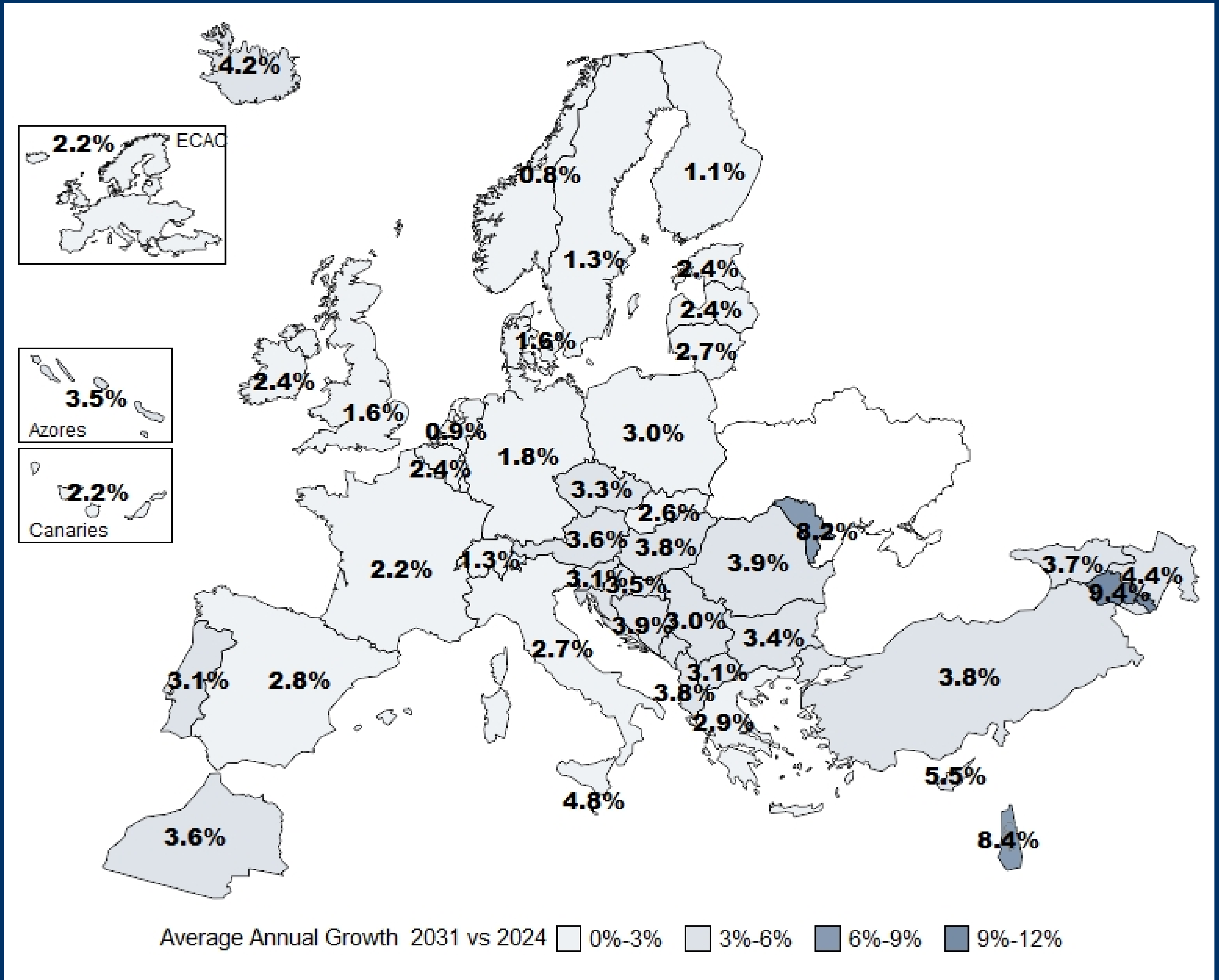
EUROCONTROL Flight Forecast Update 2025-2031

Average annual growth for 2025-2031: +2.2% (±1.6pp for low-to-high range)



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- Flight growth is expected to average 2.2% annually (±1.6pp) between 2025 and 2031, representing a slight upward revision from the previous forecast
- The largest upward revisions (in absolute terms) compared to the February 2025 publication occurred in Austria, France, Romania, Hungary and Belgium/Luxembourg
- The largest downward revisions (in absolute terms) were observed for Sweden, Denmark, Switzerland, the Netherlands and Slovakia

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

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EUROCONTROL 7-Year Forecast Update for Europe* 2025-2031 (Autumn 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**							11,075	11,634	12,132	12,588	12,951	13,353	13,723	**3.7%**	**4.0%**
	Base	11,085	4,979	6,231	9,238	10,144	10,634	11,015	11,357	11,597	11,843	12,023	12,221	12,391	**2.2%**	**2.5%**
	Low							10,956	11,092	11,073	11,117	11,094	11,088	11,064	**0.6%**	**0.9%**
Annual Growth (%) Compared to previous year.	**High**							4.1%	5.0%	4.3%	3.8%	2.9%	3.1%	2.8%	**3.7%**	**4.0%**
	Base	0.8%	-55.1%	25.1%	48.3%	9.8%	4.8%	3.6%	3.1%	2.1%	2.1%	1.5%	1.6%	1.4%	**2.2%**	**2.5%**
	Low							3.0%	1.2%	-0.2%	0.4%	-0.2%	-0.1%	-0.2%	**0.6%**	**0.9%**
Daily Growth (%) Compared to previous year. Removing leap year effect.	**High**							4.4%	5.0%	4.3%	3.5%	3.2%	3.1%	2.8%	**3.8%**	**4.1%**
	Base	0.8%	-55%	25%	48%	10%	4.5%	3.9%	3.1%	2.1%	1.8%	1.8%	1.6%	1.4%	**2.2%**	**2.5%**
	Low							3.3%	1.2%	-0.2%	0.1%	0.1%	-0.1%	-0.2%	**0.6%**	**0.9%**
Fraction of 2019 (%) Compared to 2019 level.	**High**							100%	105%	109%	114%	117%	120%	124%		
	Base	100%	45%	56%	83%	92%	96%	99%	102%	105%	107%	108%	110%	112%		
	Low							99%	100%	100%	100%	100%	100%	100%		

* ECAC is the European Civil Aviation Conference

** leap year

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

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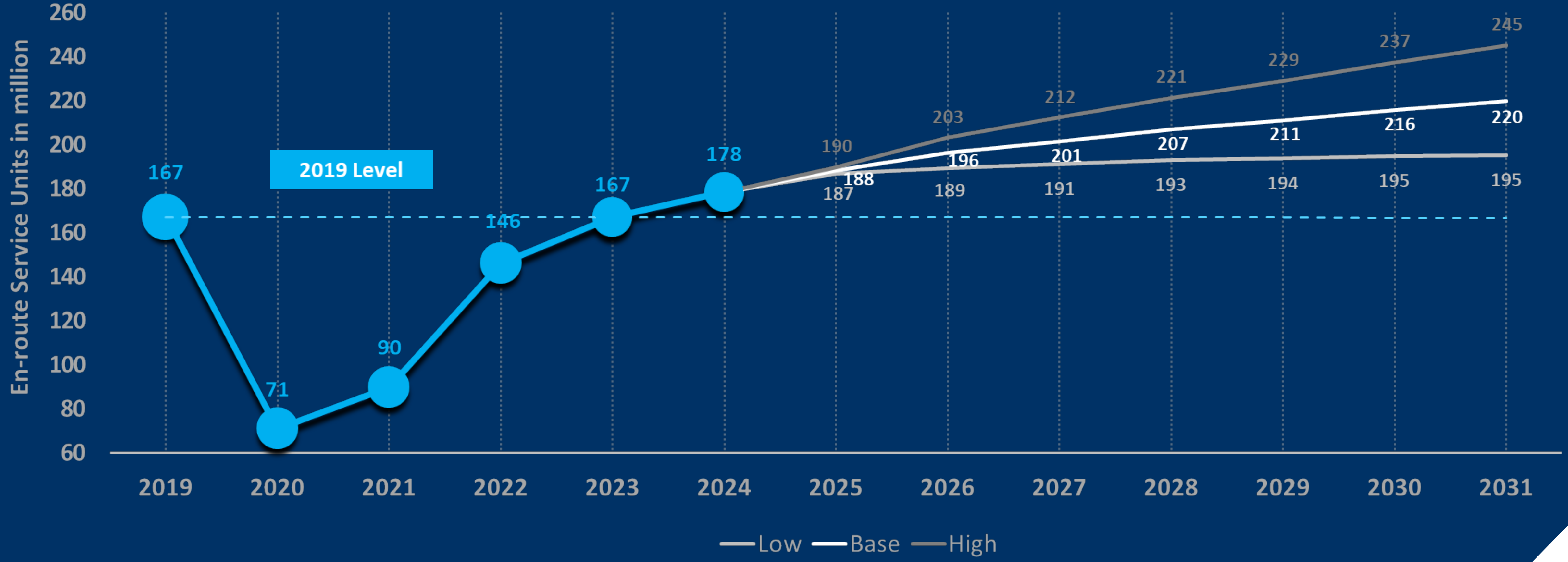
EUROCONTROL 7-Year Forecast Update for the CRCO Region° 2025-2031 (Autumn 2025)

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, Autumn 2025

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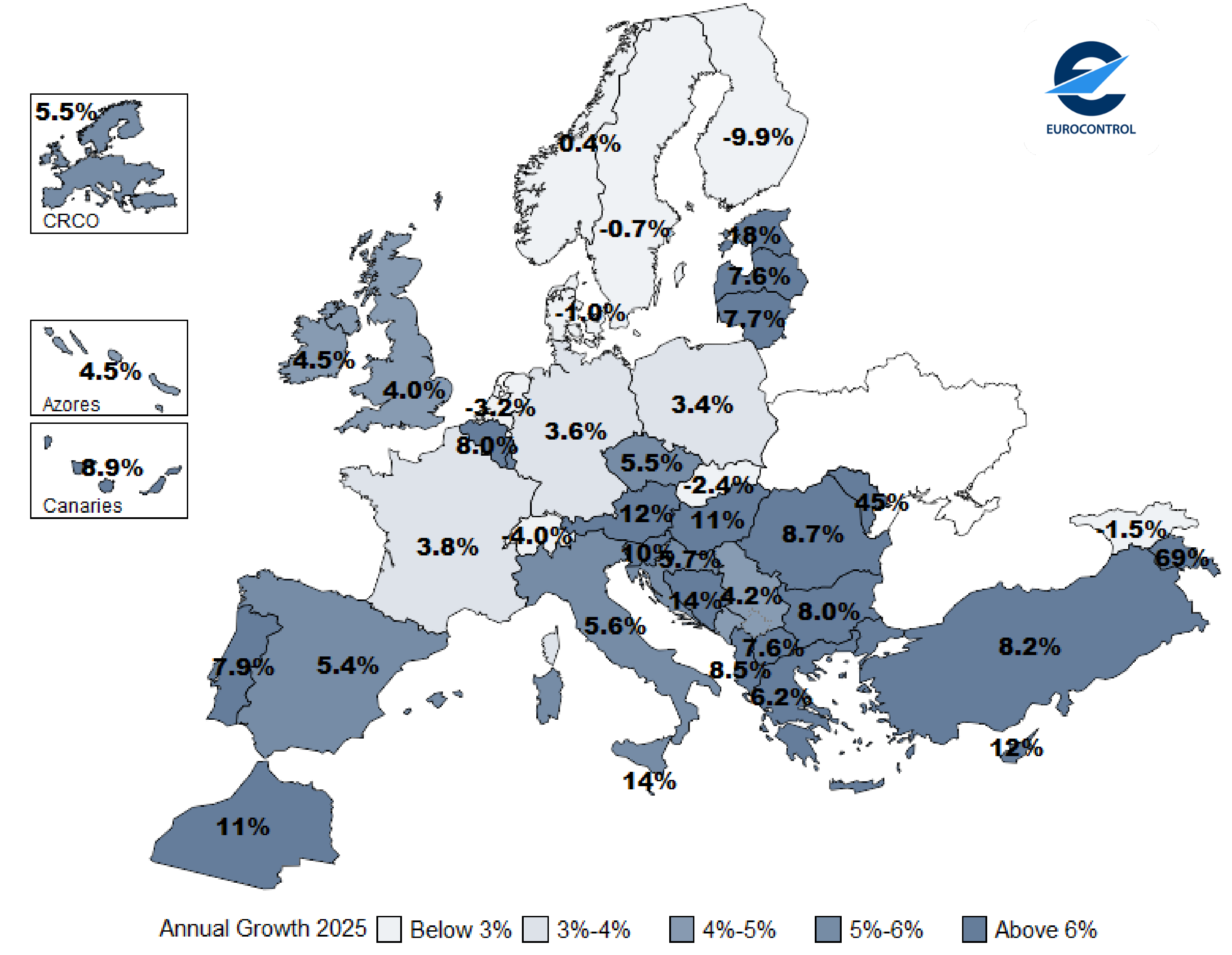
EUROCONTROL TSU Forecast Update for 2025

An upward revision (+0.9pp) for CRCO° region to +5.5% (±0.8pp), vs the February 2025 forecast



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

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- This overall upward revision is the result mainly of strong extra-European flows impacting growth, and generating more en-route service units than expected:
  - notably in the **south-east States** with local discrepancies between States: downward revisions for Croatia, Serbia/Montenegro and Greece. but upward ones in Bosnia & Herzegovina, Romania, Bulgaria and Türkiye
  - upward revisions in **western Europe** where strong transatlantic flows benefited the UK, Ireland, Portugal, the Canaries and Morocco
- Local revisions are linked to **changes in overflight trends**, with upward revisions in Austria, Slovenia, Hungary and the Czech Republic, as well as in the Baltic States, and downward ones in Norway, Sweden, Denmark, the Netherlands, Finland, Poland and Switzerland

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

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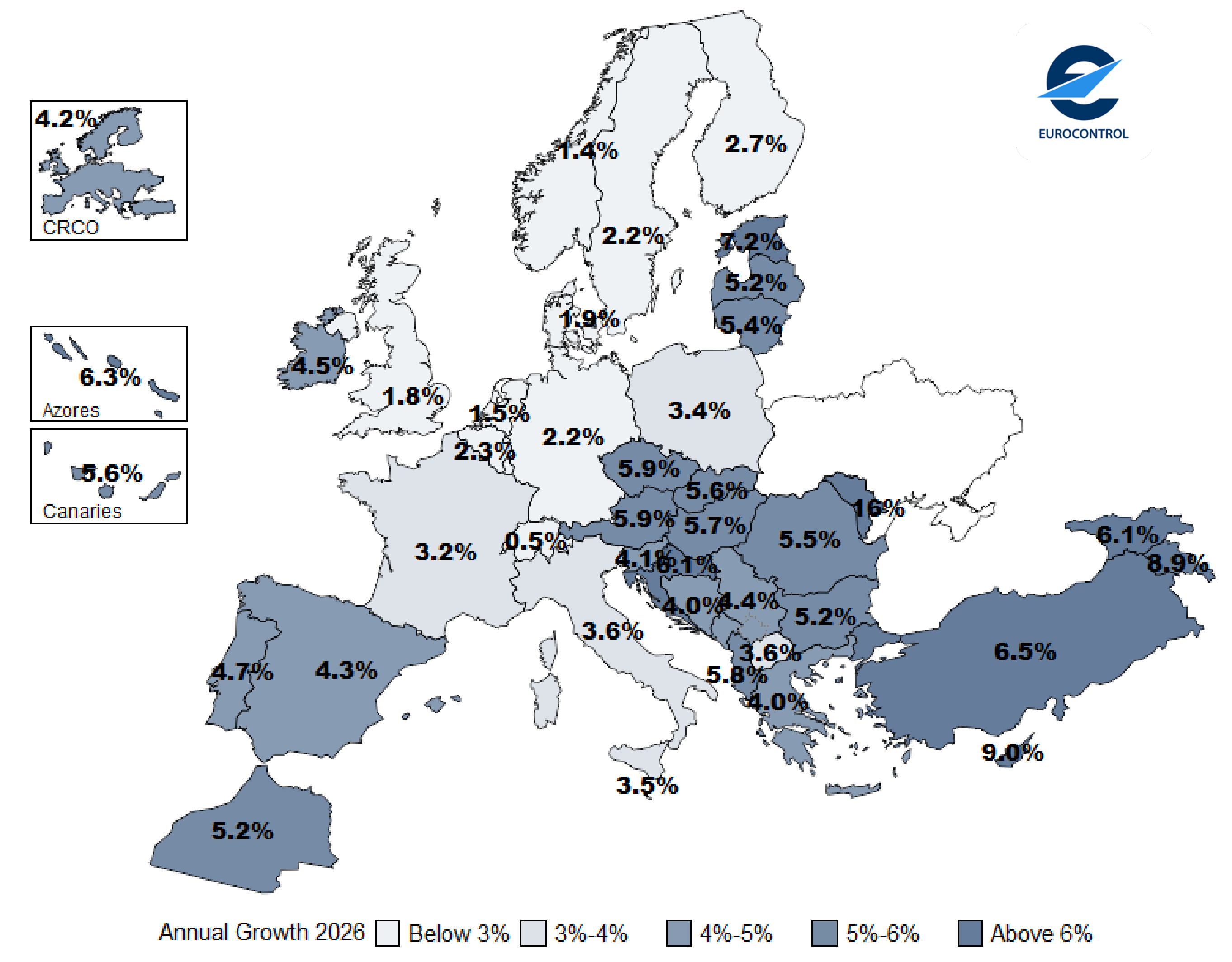
EUROCONTROL TSU Forecast Update for 2026

CRCO° Region is expected to grow by +4.2% (±2.9pp for low-to-high range)



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- In line with the revision of the flights for 2026, En-route Service Units are also revised upwards compared to the February 2025 forecast.
- In 2026, Total en-route Service Units are expected to reach **196.1 Million** in the Base forecast for the CRCO° Region vs. **193.0 Million** in the February 2025 forecast.
- Growth rates are expected to become more moderate in south-east Europe than in 2025.
- However, large uncertainties exist due to the volatility of traffic and the route flexibility around the smallest States of Europe that can affect En-route Service Units more than flights.

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

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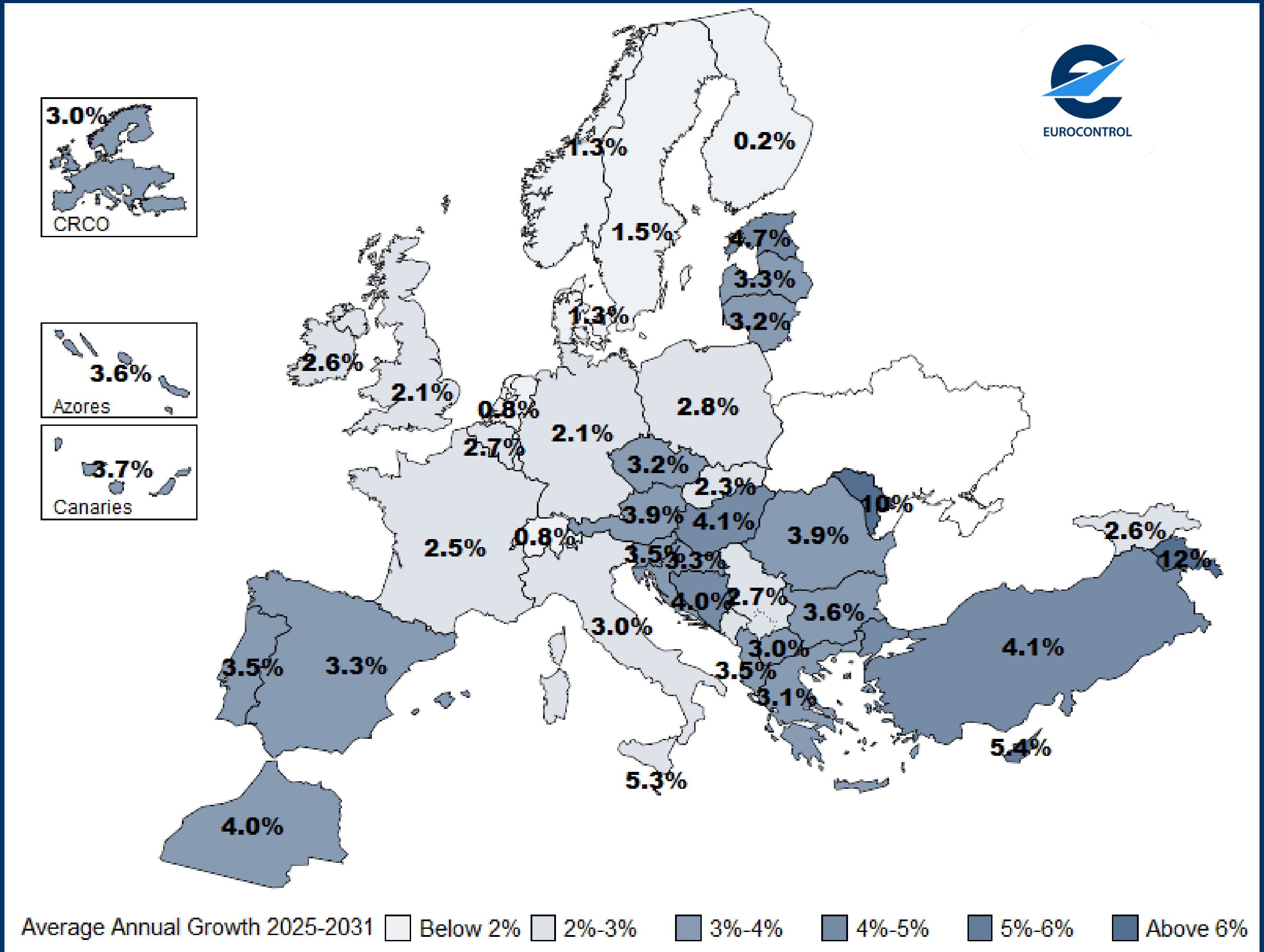
EUROCONTROL TSU Forecast Update 2025-2031

CRCO ° States' average annual growth over 2025-2031 period is +3.0% (±1.7pp for low-to-high range)



- By 2031, TSU growth is expected to become more homogeneous around Europe between eastern and western States with revisions compared to the February 2025 forecast in line with the revision 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.

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

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.

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

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EUROCONTROL 7-Year Forecast Update for CRCO° Region 2025-2031 (Autumn 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 RP4 2025-2029
En-route Service Units (Thousands)	**High**	.	.	.	.	.	.	189,638	203,136	212,280	221,311	228,856	237,229	245,070	**4.6%**	**5.1%**
	Base	167,000	70,828	89,680	146,221	166,751	178,358	188,201	196,095	201,419	206,802	211,034	215,596	219,688	**3.0%**	**3.4%**
	Low	.	.	.	.	.	.	186,848	189,366	190,986	193,002	193,768	194,704	195,284	**1.3%**	**1.7%**
Annual Growth (%) Compared to previous year	**High**	.	.	.	.	.	.	6.3%	7.1%	4.5%	4.3%	3.4%	3.7%	3.3%	**4.6%**	**5.1%**
	Base	2.8%	-58%	27%	63%	14%	7.0%	5.5%	4.2%	2.7%	2.7%	2.0%	2.2%	1.9%	**3.0%**	**3.4%**
	Low	.	.	.	.	.	.	4.8%	1.3%	0.9%	1.1%	0.4%	0.5%	0.3%	**1.3%**	**1.7%**
Daily Growth (%) Compared to previous year (Removing leap year effect).	**High**	.	.	.	.	.	.	6.6%	7.1%	4.5%	4.0%	3.7%	3.7%	3.3%	**4.7%**	**5.2%**
	Base	2.8%	-58%	27%	63%	14%	6.7%	5.8%	4.2%	2.7%	2.4%	2.3%	2.2%	1.9%	**3.1%**	**3.5%**
	Low	.	.	.	.	.	.	5.0%	1.3%	0.9%	0.8%	0.7%	0.5%	0.3%	**1.3%**	**1.7%**
Fraction of 2019 (%) Compared to 2019 level.	**High**	.	.	.	.	.	.	114%	122%	127%	133%	137%	142%	147%	.	.
	Base	100%	42%	54%	88%	100%	107%	113%	117%	121%	124%	126%	129%	132%	.	.
	Low	.	.	.	.	.	.	112%	113%	114%	116%	116%	117%	117%	.	.
SES-RP3/RP4°°		**2019**	**2020***	**2021**	**2022**	**2023**	**2024***	**2025**	**2026**	**2027**	**2028***	**2029**	**2030**	**2031**	**AAGR 2025-2031**	**AAGR RP4 2025-2029**
En-route Service Units (Thousands)	**High**	.	.	.	.	.	.	139,518	149,059	155,780	162,236	167,480	173,294	178,625	**4.5%**	**4.9%**
	Base	125,206	52,595	66,991	108,508	122,491	131,637	138,468	143,868	147,766	151,620	154,601	157,796	160,585	**2.9%**	**3.3%**
	Low	.	.	.	.	.	.	137,490	138,913	139,952	141,300	141,731	142,271	142,517	**1.1%**	**1.5%**
Annual Growth (%) Compared to previous year	**High**	.	.	.	.	.	.	6.0%	6.8%	4.5%	4.1%	3.2%	3.5%	3.1%	**4.5%**	**4.9%**
	Base	2.8%	-58%	27%	62%	13%	7.5%	5.2%	3.9%	2.7%	2.6%	2.0%	2.1%	1.8%	**2.9%**	**3.3%**
	Low	.	.	.	.	.	.	4.4%	1.0%	0.7%	1.0%	0.3%	0.4%	0.2%	**1.1%**	**1.5%**
Daily Growth (%) Compared to previous year (Removing leap year effect).	**High**	.	.	.	.	.	.	6.3%	6.8%	4.5%	3.9%	3.5%	3.5%	3.1%	**4.5%**	**5.0%**
	Base	2.8%	-58%	28%	62%	13%	7.2%	5.5%	3.9%	2.7%	2.3%	2.2%	2.1%	1.8%	**2.9%**	**3.3%**
	Low	.	.	.	.	.	.	4.7%	1.0%	0.7%	0.7%	0.6%	0.4%	0.2%	**1.2%**	**1.5%**
Fraction of 2019 (%) Compared to 2019 level.	**High**	.	.	.	.	.	.	111%	119%	124%	130%	134%	138%	143%	.	.
	Base	100%	42%	54%	87%	98%	105%	111%	115%	118%	121%	123%	126%	128%	.	.
	Low	.	.	.	.	.	.	110%	111%	112%	113%	113%	114%	114%	.	.

° 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, Autumn 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.

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 by one State on another, cybersecurity threats,** etc.

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

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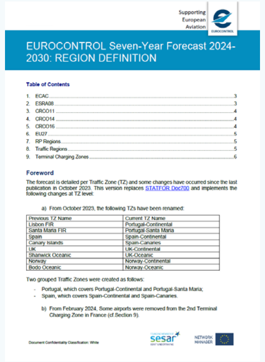
Useful links

Explore detailed definitions and data supporting this forecast



Supporting European Aviation

EUROCONTROL Seven-Year Forecast 2024-2030: REGION DEFINITION

Table of Contents

Foreword

The forecast is detailed per Traffic Zone (TZ) and some changes have occurred since the last publication in October 2023. This version replaces STATFOR Doc700 and implements the following changes at TZ level:

a) From October 2023, the following TZs have been renamed:

Previous TZ Name	Current TZ Name
Lisbon FIR	Portugal-Continental
Santa Maria FIR	Portugal-Santa Maria
Spain	Spain-Continental
Canary Islands	Spain-Canaries
UK	UK-Continental
Shanwick Oceanic	UK-Oceanic
Norway	Norway-Continental
Bodo Oceanic	Norway-Oceanic

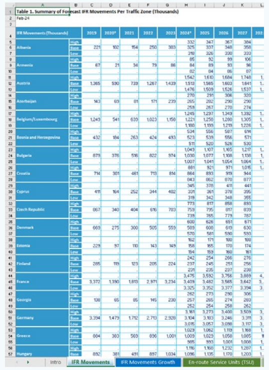
Two grouped Traffic Zones were created as follows:

- Portugal, which covers Portugal-Continental and Portugal-Santa Maria;
- Spain, which covers Spain-Continental and Spain-Canaries.

b) From February 2024, Some airports were removed from the 2nd Terminal Charging Zone in France (cf.Section 9).

Document Confidentiality Classification: White

A presentation of the geographical definitions can be found in:
[Annex – Traffic Region Definitions]



The forecast per State can be found in:
[Annex – Detailed Traffic Forecast]

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

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. **Download the 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.

Google Play Apple Store

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