



**Network Manager**  
nominated by  
the European Commission



# EUROCONTROL Seven-Year Forecast 2018 Update

## Flight Movements and Service Units 2018-2024

STATFOR

23 October 2018

# This update replaces the February 2018 forecast

This update uses:

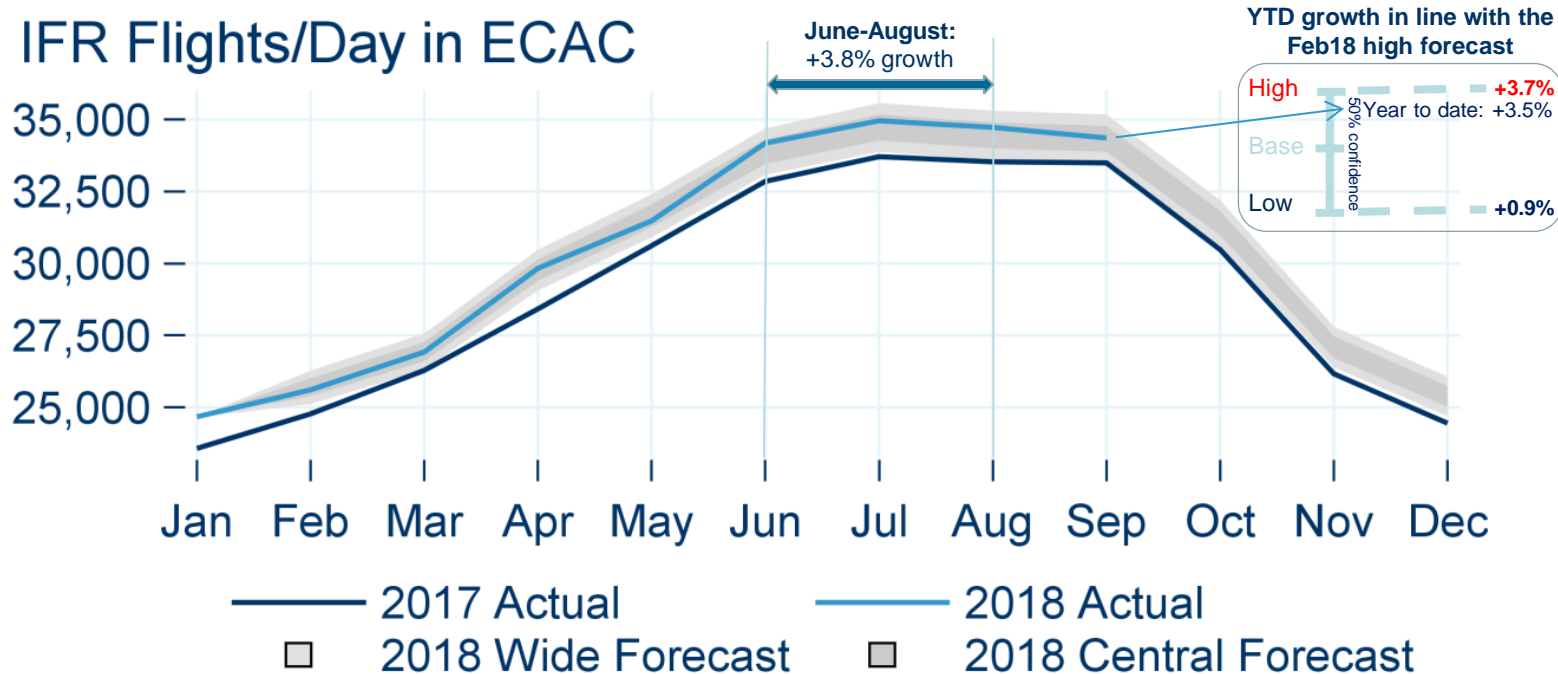
- The recent traffic trends
- The updated forecast inputs:
  - The latest economic forecast (August 2018 update)
  - Some forecast assumptions to account for foreseen traffic developments

The next update will be issued in February 2019.

# RECENT TRAFFIC TRENDS

## Traffic maintained last year's trend of high growth

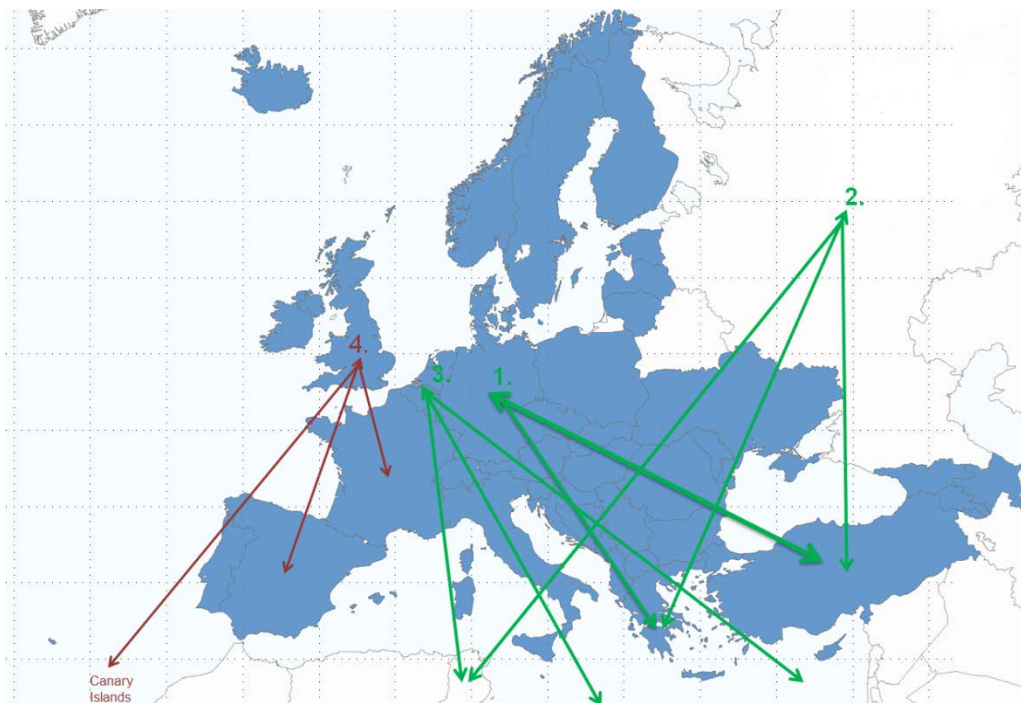
### IFR Flights/Day in ECAC



©EUROCONTROL 2018 [www.eurocontrol.int/STATFOR](http://www.eurocontrol.int/STATFOR)

# RECENT TRAFFIC TRENDS

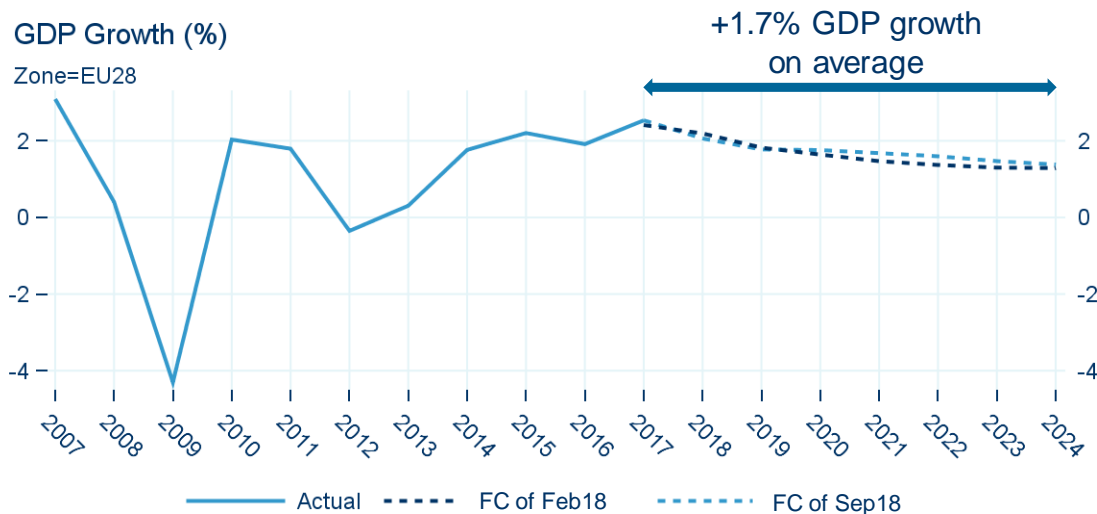
## ...flows to Turkey and Greece and the recovery of Russian traffic



1. Strong flows to Turkey and Greece (especially from Germany)
2. Recovery of Russian traffic to Mediterranean destinations (Turkey, Greece and Tunisia) strongly impacting Eastern Europe
3. European tourist flows to Israel, Egypt and Tunisia
4. Arrivals and departures slowing down in the UK (especially to Canary Islands, Greece and France)

# FORECAST INPUTS

While the economic growth is set to remain strong in the EU area...



Source: Oxford Economics  
(August 2018 update)

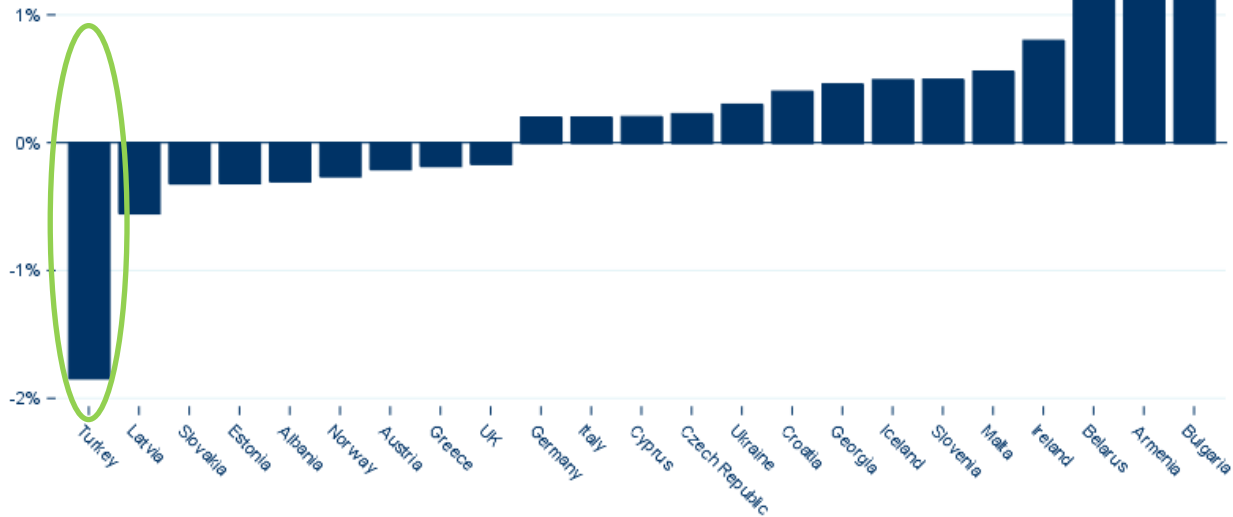
↓ 2018 revised downwards -0.1pp

↑ from 2020 revised upwards +0.2pp

# FORECAST INPUTS

... the deterioration in the economic outlook of Turkey results in a downward revision of its GDP forecast for 2019 (-1.8pp)

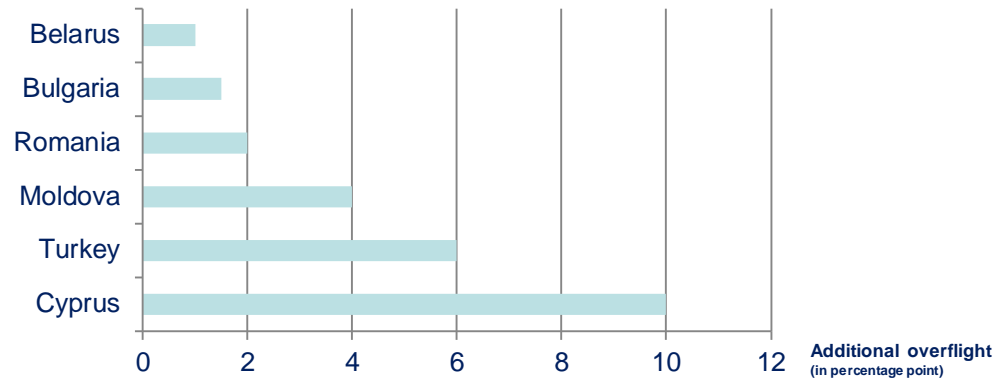
Change in GDP growth for 2019  
(Only changes greater than 0.1pp are shown)



# FORECAST INPUTS

The traffic between Russia and Egypt is expected to further recover when charter flights restart

- Likely impact evaluated based on data before the ban
- Expected additional growth of overflights in some states:



# FORECAST INPUTS

## Other input changes include ...

- Delayed opening of the New Istanbul airport and transfer of traffic from Istanbul Ataturk (to 30/31 December 2018)
- Delayed opening of Lelystad (EHLE) from 2020 instead of 2019
- Allowance of uncertainty in Arrivals/Departures for Turkey (fragile economy) and UK (Brexit)

## What remains the same...

- Load factors, low-cost evolution, population forecasts, high-speed train future developments, most airport capacities, sport events impact



# FORECAST RISKS

## Risks to the forecast growth

- **Oil price:** Current surge in oil prices could lead to an increase of fuel costs, hence an increase of the ticket prices which is a downside risk.

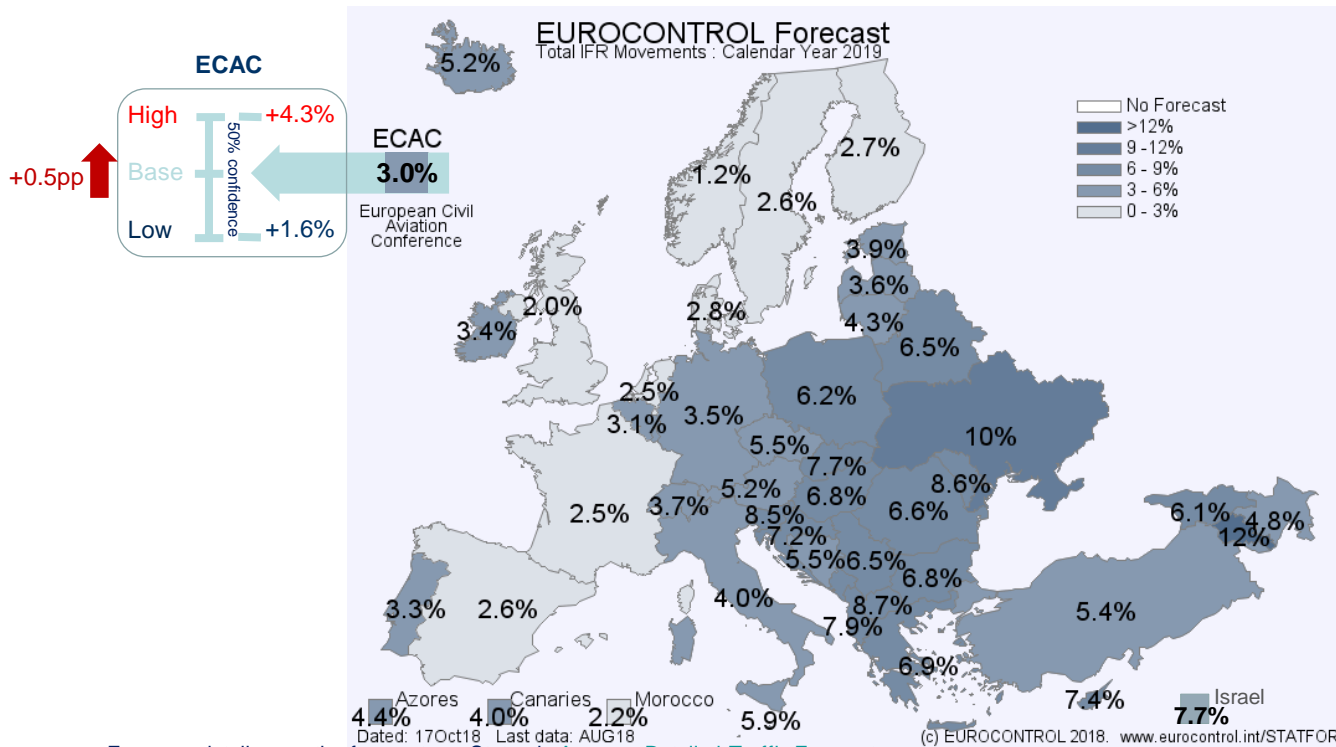


- **Brexit:** We assume that, despite Brexit, aviation will still go on largely as normal. However, UK low scenario allows wider uncertainty for international traffic from and to UK.
- For **other risks**, please see the [report of February 2018 forecast](#)



# FLIGHT FORECAST

## 2019 flight forecast per State (Base scenario)

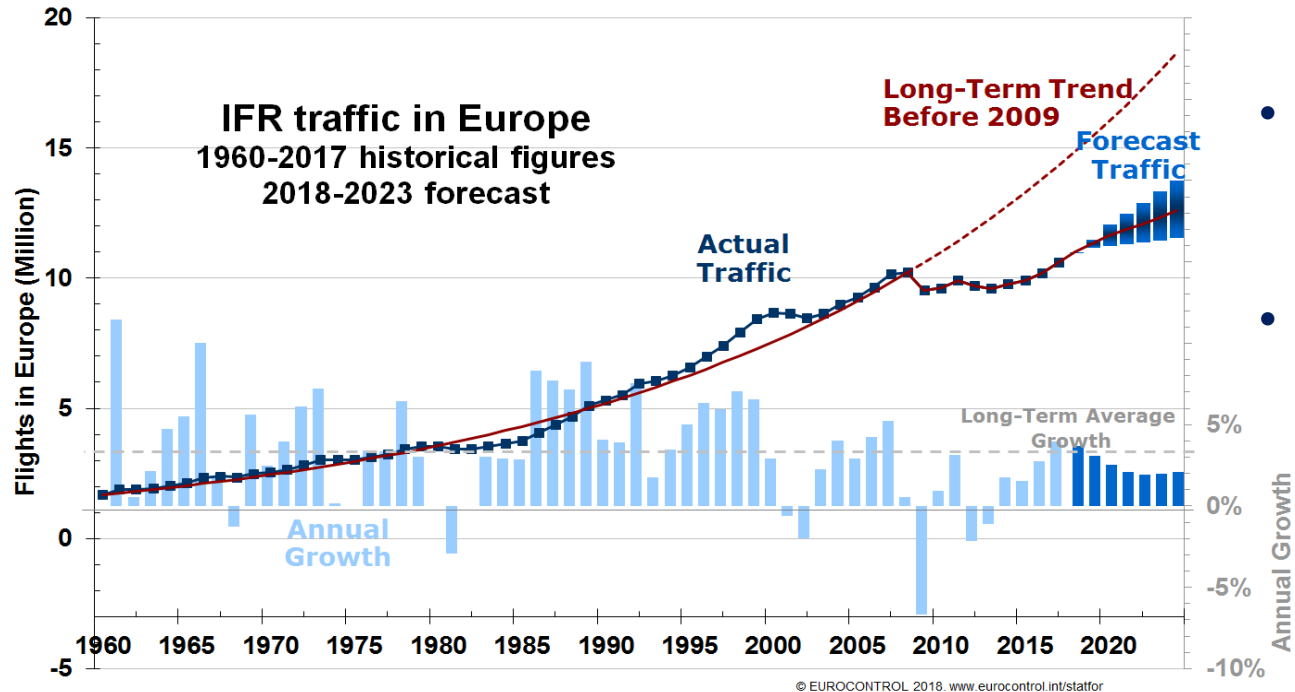


- Upward revision of +0.5pp compared to the February 2018 base forecast
- Uncertainty for 2019 is wider than the +/-1pp of the February forecast

For more details, see the forecast per States in [Annex – Detailed Traffic Forecast](#)

# FLIGHT FORECAST

## Average annual growth per State between 2017 and 2024

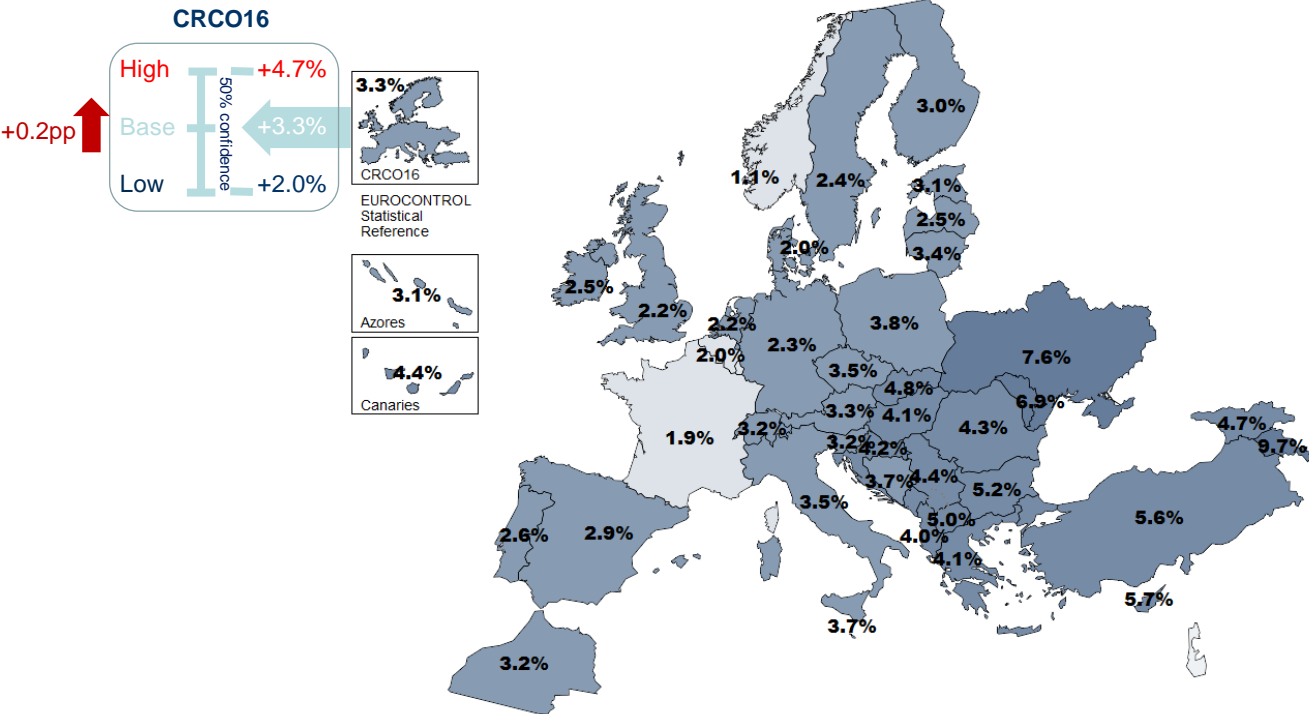


- Over 2018-2024, 2.5% Average Annual Growth for ECAC
- A revision upwards +0.2pp in line with the strong recent flight growth and the strong economic outlook for EU28

For more details, see the forecast per States in [Annex – Detailed Traffic Forecast](#)

# EN-ROUTE SERVICE UNIT FORECAST

## Average annual growth per State between 2017 and 2024



- Upward revision of +0.2pp compared to the February 2018 base forecast, owing to the upward revision in the flight forecast
- The continuing trend in increasing weights and the relative stability in average distance flown explains the faster growth of service units than flights

For more details, see the forecast per States in [Annex – Detailed Traffic Forecast](#)

# Some useful details

- **Traffic Region Definition**

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

- **Forecast per State**

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

© European Organisation for the Safety of Air Navigation (EUROCONTROL) 2018  
This document is published by EUROCONTROL in the interests of exchange of information.  
It may be copied in whole or in part, providing that the copyright notice and disclaimer are included.  
The information contained in this document may not be modified without prior written permission from EUROCONTROL.  
EUROCONTROL makes no warranty, either implied or express, for the information contained in this document, neither does it assume any legal liability or responsibility for the accuracy, completeness or usefulness of this information.  
The charts are disseminated under the sponsorship of EUROCONTROL in the interest of information exchange.  
National boundaries depicted on the charts are only indicative and have no political significance.  
For further information please contact STATFOR, the EUROCONTROL Statistics and Forecast Service  
[statfor.info@eurocontrol.int](mailto:statfor.info@eurocontrol.int)  
<https://www.eurocontrol.int/statfor>  
The EUROCONTROL Statistics and Forecast Service is ISO 9001:2015 certified 