



EUROCONTROL Short-Term Forecast

September 2009

Flight Movements
2009 – 2010



EUROCONTROL Short-Term Forecast, September 2009. IFR Flight Movements 2009-2010.

Summary: Little sign of the economic recovery yet in European flight forecast

A number of European economies may have left recession behind, but the recovery in traffic growth is arriving more slowly than forecast. The decline in traffic remains broad-based, affecting all market segments and nearly all States of Europe. As a result, the regular September update of the flight forecast presents a slight downward revision for 2009.

For the moment, the traffic situation is relatively stable. In practice this means that the recovery has been more gradual than forecast and all major market segments continue to operate fewer flights than in 2008. For the low-cost segment as a whole, a return to growth is probably only a few weeks away. However, for all-cargo and business aviation even the partial recovery of the Summer is looking fragile.

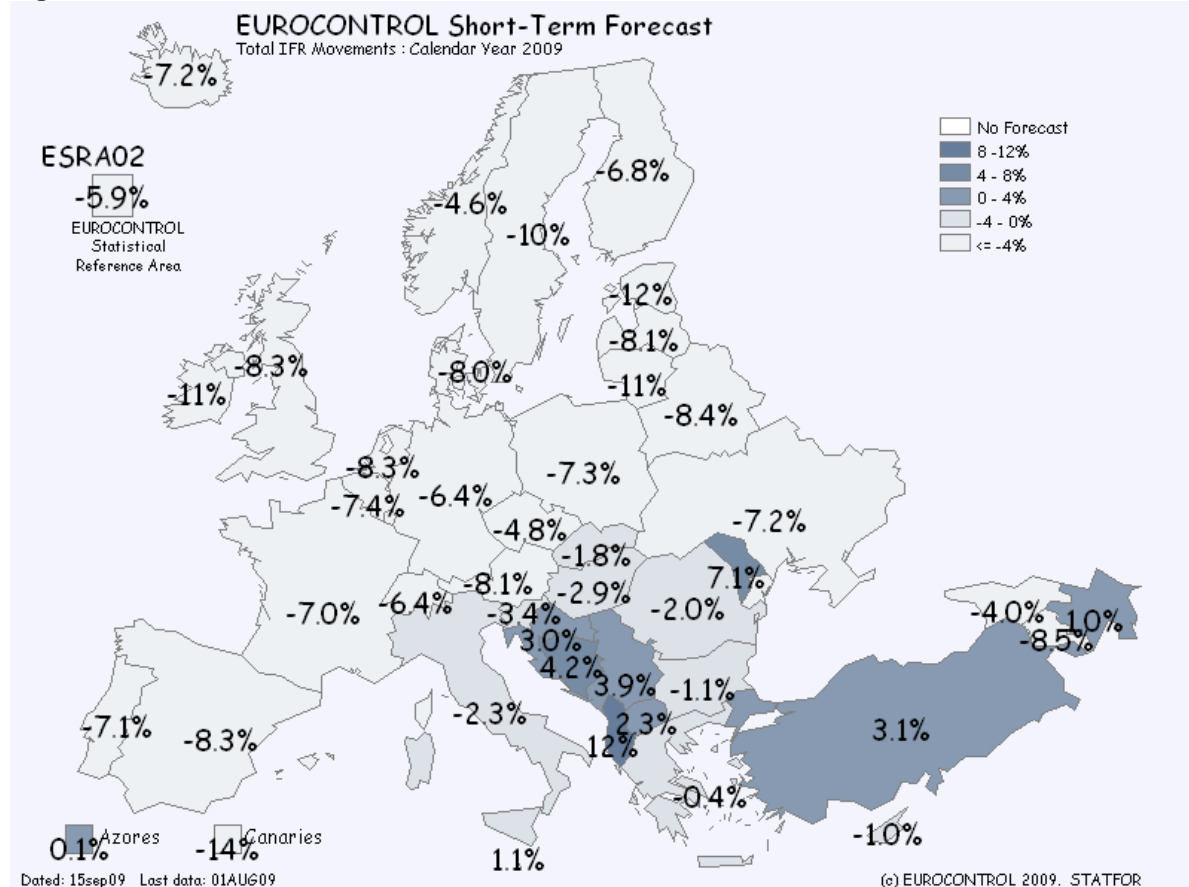
Since July, load factors have significantly improved, even if yields remain weak. The capacity cuts announced for the Winter timetable are correspondingly fewer and smaller than this time last year.

The forecast 2009 growth is in a range from -7.3% and -4.7% with a most likely case of -5.9%. This forecast range is still wide, due to the instability of the current economic situation.

Implicit in this forecast is a return to (weak) growth in November/December 2009. However, with further cuts in the Winter 09/10 timetables announced by some airlines the recovery could be 3-6 months later than that. So the outlook for 2010 is growth in ESRA as a whole of 1.8% with a large forecast range between -3.9% and 6.6%.

The forecast will next be updated in December 2009.

Figure 1. Growth of IFR movements in 2009 see Annex B (Uncertainty is typically ± 1.2 percentage points.)



1. INTRODUCTION

The Statistics and Forecast Service (STATFOR) of EUROCONTROL produces a short-term (two years) forecast of IFR flights in Europe. This is published four times per year.

This issue of the short-term forecast is aligned with the refreshed medium-term forecast that is also being published in September 2009. It was also prepared in parallel with the forecast of service units that STATFOR produces for the Central Route Charges Office of EUROCONTROL.

This update of the flight forecast uses the improved method that was first put into operation last February. This method is outlined in Annex C. The main improvements are:

- The short-term forecast is now network-based, ie it forecasts zone-to-zone traffic flows for some 8000 zone-pairs rather than forecasting each State independently as in the old method.
- The February and September short-term forecasts are aligned with the medium-term forecast for the first two years at this zone-to-zone level of detail.
- That alignment means that increasingly in the later months of the short-term forecast, economic factors influence the growth forecast.
- The short-term forecast incorporates future schedule data.

Reporting of the forecast for this summary report remains focused on the main flows for each State, and for the EUROCONTROL Statistical Reference Area (ESRA02). The ESRA02¹ represents the whole of Europe. It is a large, stable subset of the Member States used for comparison purposes since 2003. An extended definition of the ESRA "ESRA08" has been introduced this year into the medium-term forecast. The short-term forecast will transition to using the ESRA08 rather than the ESRA02 in a future update later in 2009.

In the remainder of this document:

- Section 2 looks at what has changed since the last forecast, and what this says about trends in growth.
- Section 3 summarizes the forecast for 2009.
- Section 4 outlines the forecast for 2010.

The next short-term forecast will be published by the end of December 2009.

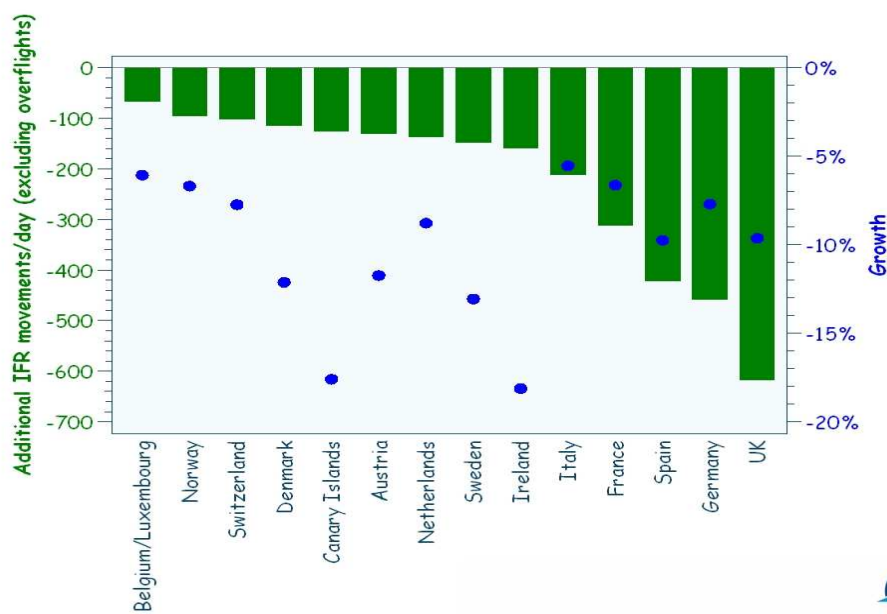
¹ The ESRA (2002) consists of Austria, Belgium, Bulgaria, Canary Islands, Croatia, Cyprus, Czech Republic, Denmark, Finland, France, FYROM, Germany, Greece, Hungary, Ireland, Italy, Lisbon FIR, Luxembourg, Malta, Moldova, Netherlands, Norway, Romania, Santa Maria FIR, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, United Kingdom.

2. RECENT TRAFFIC TRENDS

The recession has affected air traffic on three broad fronts: reduced output means fewer goods to ship and lower demand for air travel; secondly, credit difficulties have hindered restructuring and investment by aircraft operators and contributed to bankruptcies; and finally there are indications that recent migration flows within Europe, which had brought an increase in air travel, may be reversing. Although output is now stabilizing, demand for business travel remains low. Coupled with high fuel costs this makes for a challenging business environment for airlines.

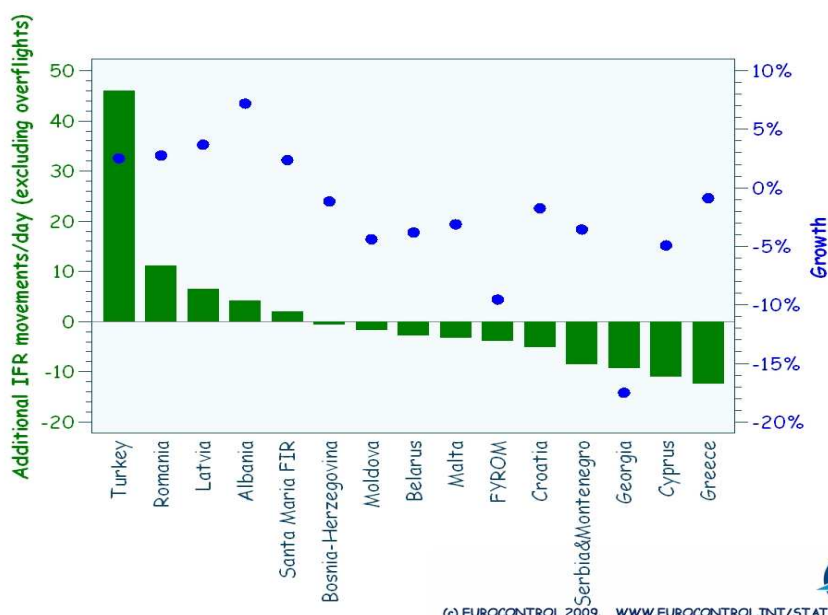
Figure 2 shows that the busiest States have all seen significant reductions in traffic in the previous four months. The declines are seen in nearly all States, and the Europe-wide causes of decline are at least as important as the local causes. On the other hand, there are some States which are seeing growth in flights, either because of re-routing effects (e.g. Albania (+13%)), or also in origin-destination traffic (see Figure 3).

Figure 2. The five busiest States all contributed to a decline in traffic on the European network in May-August 2009 period.



(c) EUROCONTROL 2009. WWW.EUROCONTROL.INT/STATFOR

Figure 3. Only four States contributed much in the way of new flights to the European network in May-August 2009 period.



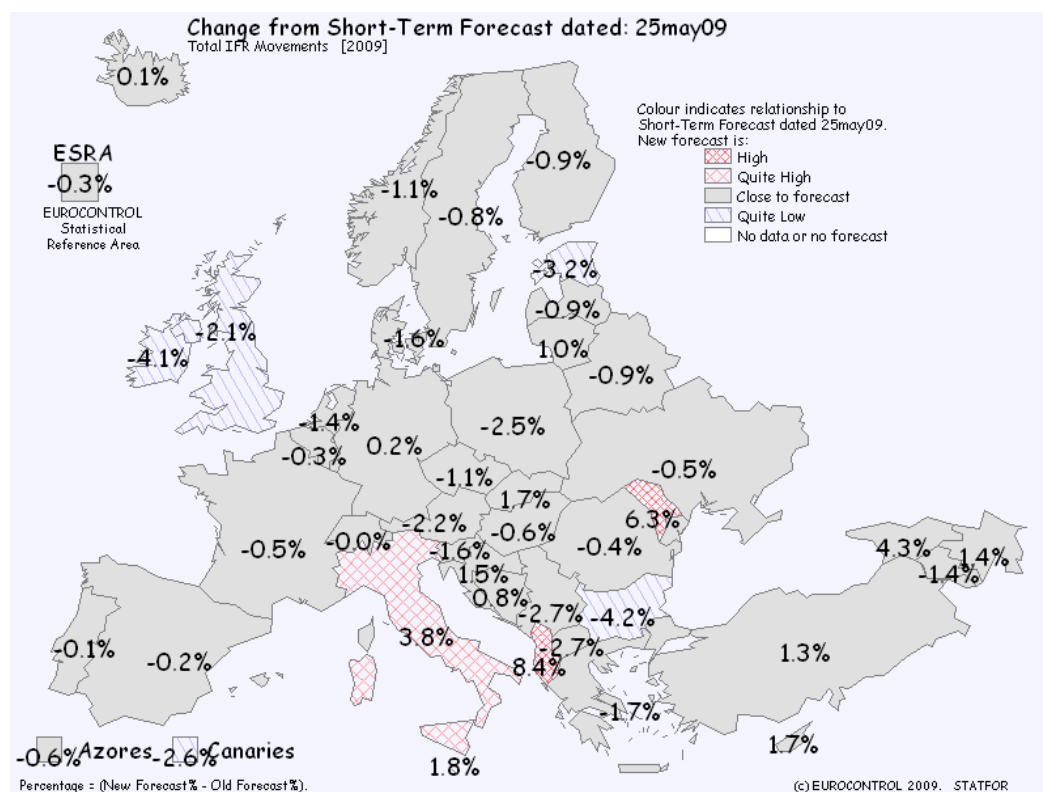
(c) EUROCONTROL 2009. WWW.EUROCONTROL.INT/STATFOR

Figure 4 compares the new short-term forecast for 2009 as a whole with the one published in May 2009. The numbers on the map give the *differences* between the new forecast (shown in Figure 1 and Appendix B) and the one made in May 2009, in terms of *change in growth* of total IFR movements in 2009 (for the new growth forecasts themselves see Figure 1). So for example, the forecast for the ESRA02 is down by 0.3 percentage points.

The main changes in traffic have affected the following States:

- The decrease of US and UK flows and weak internal flights have significantly affected the traffic growth in Ireland;
- The UK, where traffic growth has been strongly affected by the reduction in internal flights and in flows to/from US and most of big European States;
- Traffic growth in the Canary Islands has decreased due to weak internal flights and flights to/from Spain, UK and Germany. A recovery might occur during this Winter. Indeed, Spanish authorities have promulgated a discounted charging regime which motivated Ryanair to start 39 new routes from the Canaries;
- Weak traffic flows between Estonia, Lithuania and Finland are the main contributors to stronger declines in Estonia;
- Italy, where traffic is still decreasing but more slowly than forecasted. Internal flights and the weak flows to big European States have considerably affected the traffic growth in Italy;
- Bulgaria, where the rate of traffic decline has accelerated due to declining internal traffic and weak German flows;
- Faster growth in Albania is mainly due to re-routing of flights to Greece and Egypt;
- The flows to/from India and the Middle-East have boosted the overflights in Moldova.

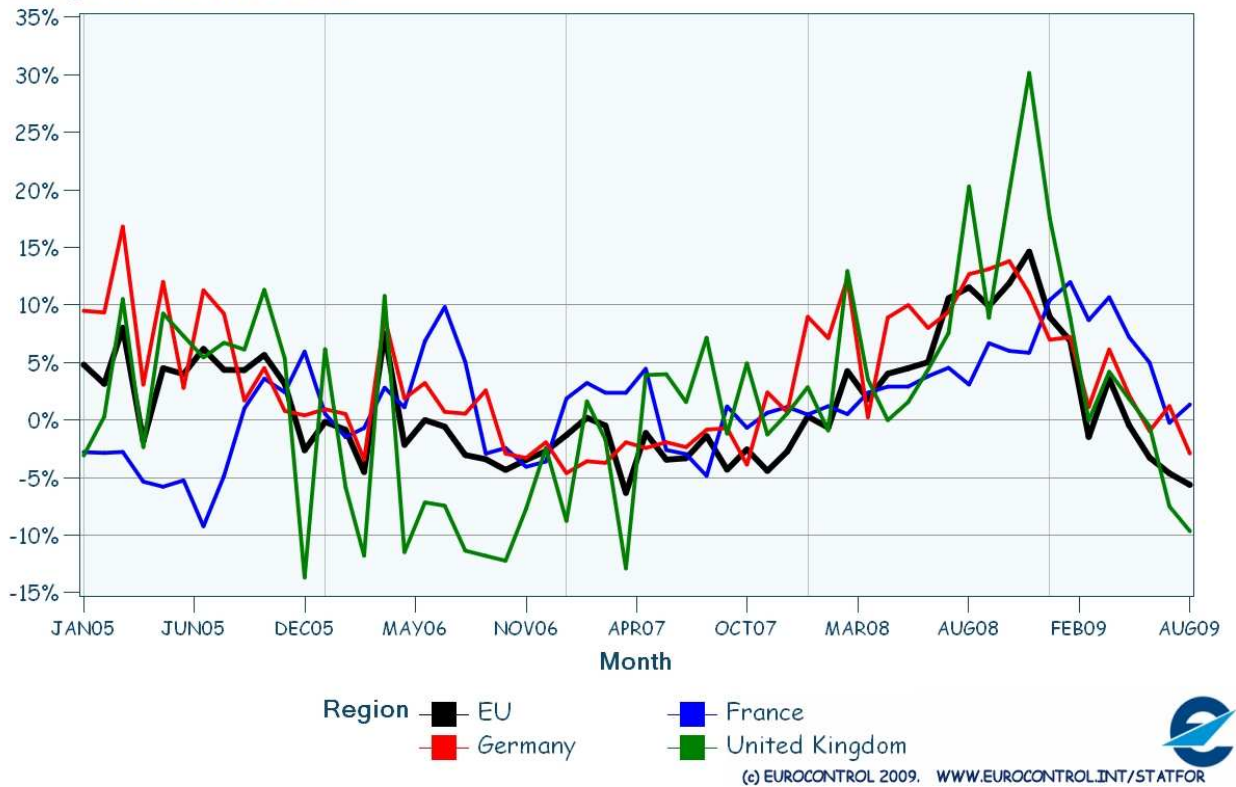
Figure 4. Difference between the new forecast and the *previous* Short-Term Forecast, in terms of total growth in 2009.



Oil and fuel costs are still volatile and are around half the cost (on average) when compared to the costs of 12 months ago. Since last June, Eurostat ticket price data (Figure 5) show that average ticket prices are below those of 12 months ago. In practice, airlines' yields have fallen even faster than this, as many passengers are switching to lower price tickets.

Figure 5. Real ticket prices in EU have decreased by 5.6% in August 2009. (Source: Eurostat)

Change in Price of Air Travel



Since July 2009 (Figure 6), the load factors of AEA airlines have recovered, showing that airlines have taken the necessary measures (capacity cuts) to fill their aircraft (albeit at a cost to profitability). The suspension of “use-it-or lose-it” slot rule freed airlines to trim further which leads to an overall increase of load factors, though this has not yet been extended into the Winter timetable period.

Figure 6. Since June, load factors have significantly improved. This might be the end result of the multiple capacity cuts announced by airlines (Source: AEA)

Load Factors in EU

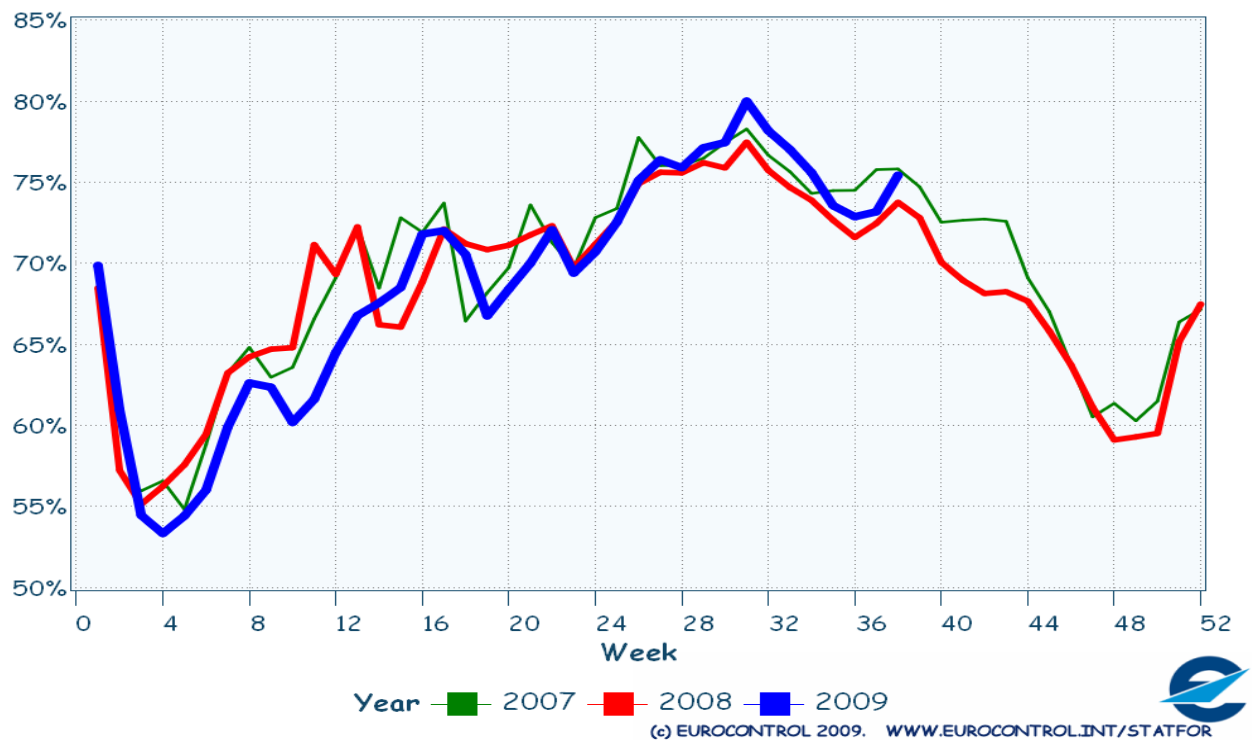


Figure 7 and Figure 8 show growth per market segment for the last few years, and in recent weeks. It is clear that the recovery has been at best partial. The low-cost segment shows the clearest signs of heading back into growth, but with the failure of SkyEurope, even this segment remains in decline and will stay there until the failure of Sterling falls out of the calculations in November. Charter ('non-scheduled') is recovering faster in September, but all-cargo and business aviation flights are again weaker than earlier in the Summer.

Figure 7. All market segments continue decreasing but at a slower rate for low-cost segment.

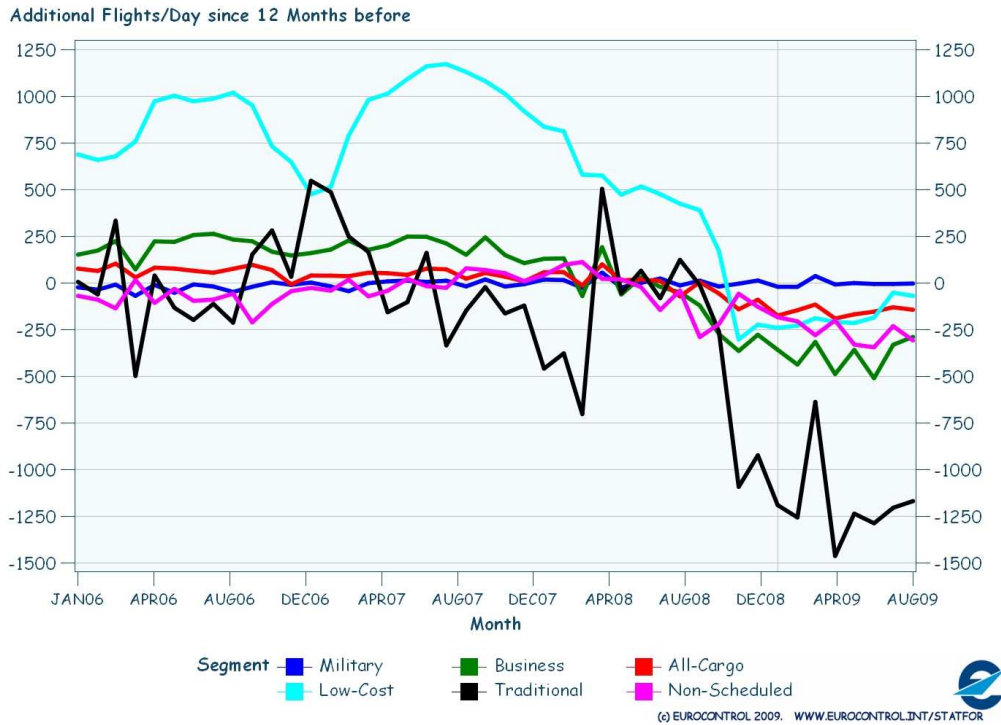


Figure 8. Growth per market segment in recent weeks.

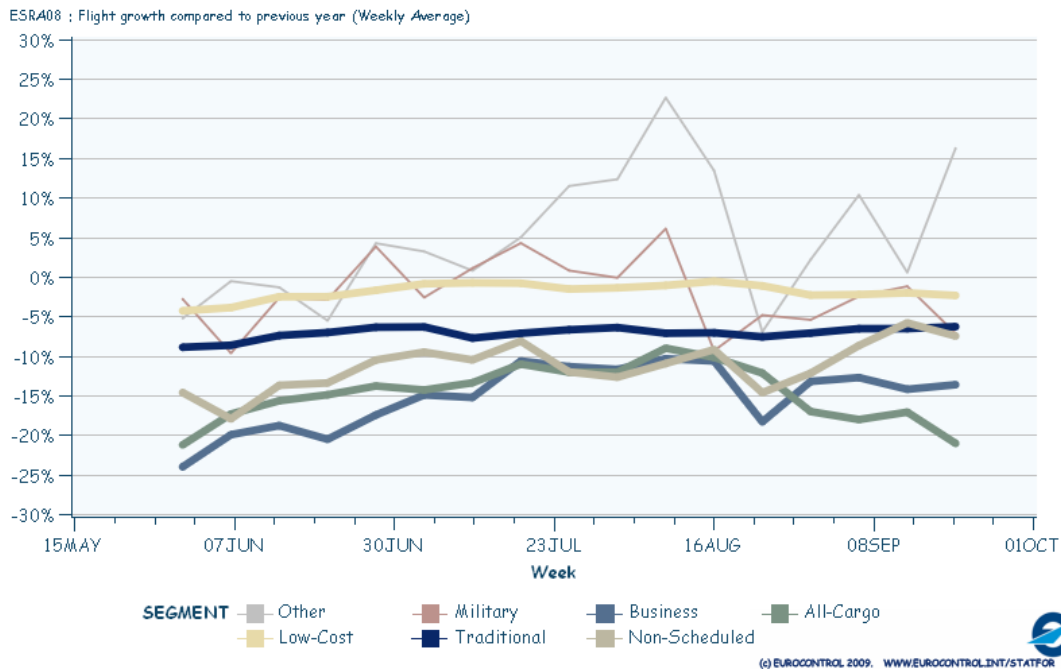
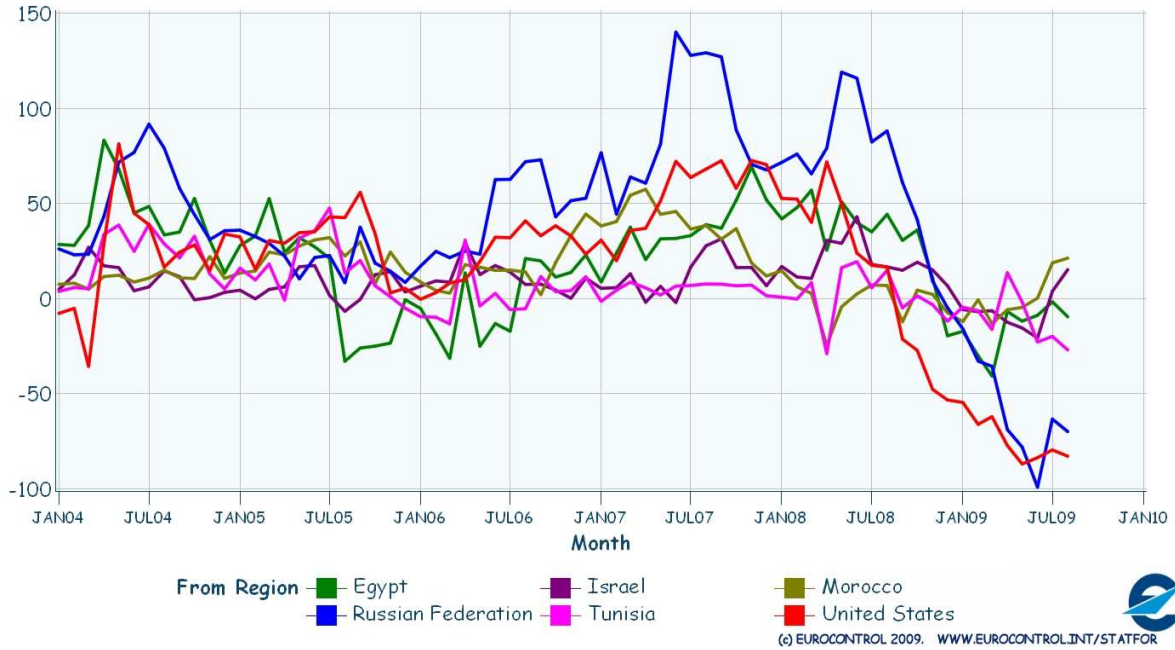


Figure 9 Traffic growth to the top 6 destinations outside Europe in August 2009 reveals that flows to US, Russia, Tunisia and Egypt are still in decline, meanwhile traffic growth to Morocco and Israel increased respectively by 8% and 6%.

Figure 9. Main changes in flows from outside Europe: In August 2009 and within the top 6 destinations, only Morocco and Israel generated more flights than 12 months ago.

Change in Flights per day since 12 months before (Top 6 Destinations)

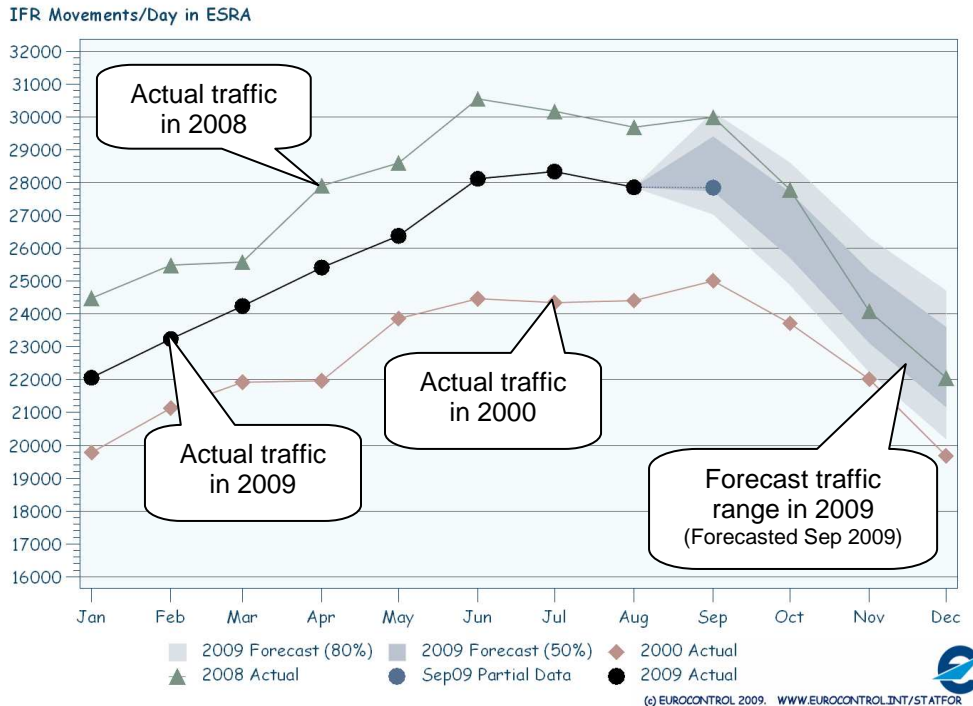


3. THE FORECAST FOR 2009

Figure 10 compares the range of the new forecast with the actual traffic in 2000 and 2008. Traffic in 2009 remains around 6% below that in the same months of 2008. Even though the new forecast presents a slight downward revision of growth expectations, preliminary data for September shows that actual traffic is likely to be towards the low end of the new forecast range, so a further slight downward revision is possible.

Looking ahead to later in the year, up to October, the forecast is significantly below monthly traffic levels of 2008. From November, traffic counts in 2009 might start to match those of 2008.

Figure 10. Traffic growth in the ESRA02. (For all States, see Annex A.)

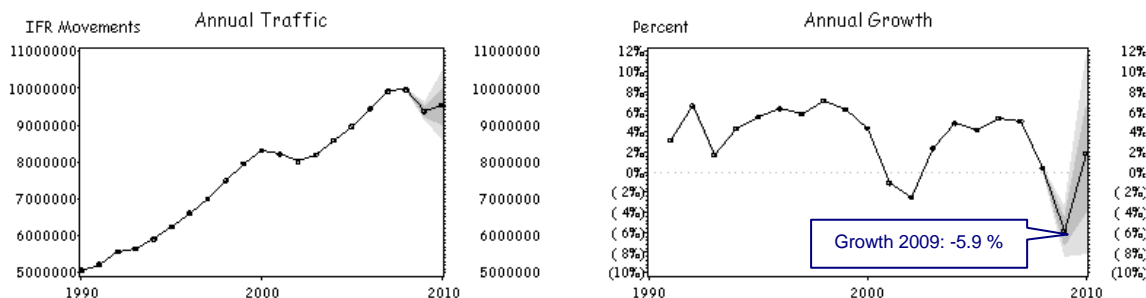


The outlook for the Winter timetable season is mixed. Some major airlines have announced increases (Ryanair, Air Berlin, Turkish Airlines), whilst others (Air France, BA, Finnair domestic) will cut back further on Winter 08/09's already depressed volumes. In some cases, 'cuts' look more like starting the Winter season with the traffic volumes on which they ended last Winter season: since they made significant cuts during the season. This supports the forecast that growth will return to zero during the Winter timetable period.

The new forecast for 2009 is shown on page 3 (Figure 1) and in detail in Annex B. This forecast is based on eight months of actual data for 2009 and four months of forecast data. Growth for the region as a whole in 2009 is substantially slower than in 2008: the forecast growth is -5.9% ($\pm 1.3\%$). This forecast range is understandably wide, due to the instability of the current economic situation.

Figure 11 shows the annual forecast for the ESRA02. The uncertainty around this forecast is indicated by dark- and light-grey bands, indicating regions of decreasing likelihood. The darker grey band is about $\pm 1.3\%$ growth for the ESRA02 for 2009.

Figure 11. Annual movements and growth for the ESRA02.



Dated: 15sep09 Last data: 01AUG09

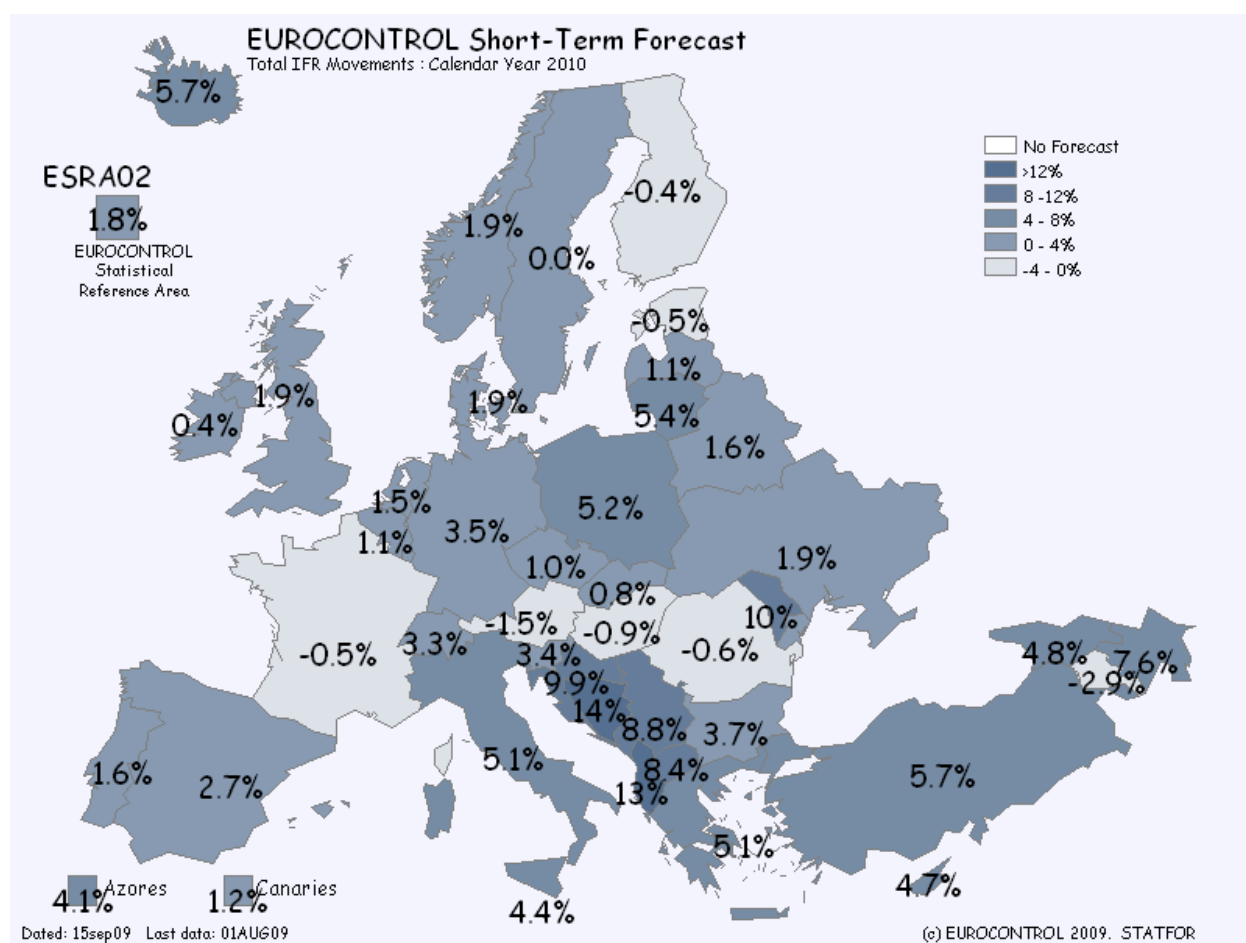
4. THE FORECAST FOR 2010

The forecast extends to the end of 2010. Figure 12 shows the forecast for the whole of 2010. The baseline forecast is that traffic growth might reach 1.8% ($\pm 5.3\%$) growth for ESRA02 in calendar year 2010, with most States returning to positive growth, albeit lower growth than average.

As the forecast for 2010 has been revised downwards (from 2.3% in May), the recovery could come later than expected. In this forecast, the return to zero or positive growth comes around the beginning of the Winter 09/10 timetable, in November 2009. While there are signs of economic improvement, and some States have exited recession, there remain downside risks to the economy as well as to traffic. Some airlines have already announced further cuts for the Winter 09/10 timetables. As a result, the recovery could easily slip to 3-6 months later, to the Spring of 2010.

For the ESRA02 as a whole, the forecast is 1.8% ($\pm 5.3\%$), a moderate level of growth indicating that there is little likelihood of a strong 'bounce-back' (in which traffic gets back to the volumes that were forecast two years ago for 2010).

Figure 12. Forecast for 2010. (Uncertainty is typically ± 6 percentage points, ± 4.6 for States with 1million flights)



A. ACTUAL GROWTH SINCE PREVIOUS FORECAST

Table 1 shows actual growth in IFR movements in each State or region in May-August 2009 period, compared to the same period 12 months before. For reference, the forecast range is shown from the previous short-term forecast, published in May 2009.

Table 1. Actual growth per State, May-August 2009 vs. May-August 2008, with details of the forecast range.

State	Actual Growth	Expected Growth: (25May09) Forecast Range				
		Between these values 80% of the time		Between these values 50% of the time		
Albania	13.2%	-2.4%	0.6%	7.8%	11.1%	
Armenia	-7.0%	-18.0%	-13.8%	-2.9%	2.1%	
Austria	-7.9%	-9.6%	-7.5%	-2.5%	-0.2%	
Azerbaijan	1.6%	-9.9%	-6.1%	4.4%	10.1%	
Belarus	-10.0%	-13.0%	-11.1%	-6.4%	-4.2%	
Belgium/Luxembourg	-7.8%	-10.1%	-8.4%	-4.3%	-2.5%	
Bosnia & Herzegovina	3.4%	-5.9%	-1.8%	8.0%	12.5%	
Bulgaria	-1.7%	-1.4%	1.1%	7.3%	10.4%	
Canarias	-16.9%	-17.2%	-14.6%	-8.3%	-5.3%	
Croatia	0.3%	-4.6%	-1.9%	4.5%	7.5%	
Cyprus	-1.6%	-9.4%	-6.6%	0.0%	3.2%	
Czech Republic	-5.0%	-7.6%	-5.6%	-1.0%	1.1%	
Denmark	-11.0%	-12.9%	-10.7%	-5.7%	-3.4%	
ESRA	-7.0%	-10.8%	-8.5%	-2.8%	-0.1%	
Estonia	-13.8%	-13.2%	-11.2%	-5.9%	-3.4%	
FYROM	0.6%	-6.9%	-1.2%	12.9%	19.6%	
Finland	-8.6%	-12.0%	-9.2%	-2.5%	0.6%	
France	-7.4%	-10.6%	-8.7%	-4.2%	-2.1%	
Georgia	-4.4%	-20.1%	-15.7%	-4.7%	0.8%	
Germany	-7.7%	-12.0%	-9.8%	-4.3%	-1.7%	
Greece	-2.4%	-6.2%	-3.0%	4.4%	7.9%	
Hungary	-2.2%	-5.3%	-3.7%	0.2%	2.0%	
Iceland	-9.3%	-19.3%	-13.8%	-0.9%	5.1%	
Ireland	-13.6%	-12.5%	-10.4%	-5.5%	-3.2%	
Italy	-4.9%	-12.0%	-9.8%	-4.7%	-2.3%	
Latvia	-8.7%	-11.8%	-9.7%	-4.6%	-2.2%	
Lisbon FIR	-8.6%	-12.2%	-10.2%	-5.4%	-3.2%	
Lithuania	-13.2%	-18.5%	-15.9%	-9.3%	-6.1%	
Malta	0.9%	-6.6%	-3.8%	3.3%	6.8%	
Moldova	7.8%	-5.3%	-2.7%	4.1%	7.4%	
Netherlands	-9.3%	-10.8%	-9.0%	-4.8%	-2.9%	
Norway	-6.0%	-7.4%	-5.4%	-0.6%	1.7%	
Poland	-9.9%	-13.4%	-10.3%	-2.8%	0.9%	
Romania	-1.3%	-6.3%	-4.0%	1.2%	3.5%	
S. Maria FIR	-0.8%	-5.3%	-2.6%	4.3%	7.6%	
Serbia & Montenegro	2.6%	2.0%	4.2%	9.5%	11.9%	
Slovakia	-1.1%	-7.6%	-5.5%	-0.4%	2.1%	
Slovenia	-5.5%	-7.0%	-4.3%	1.6%	4.4%	
Spain	-9.3%	-13.0%	-10.9%	-5.7%	-3.1%	
Sweden	-13.1%	-16.9%	-14.2%	-8.1%	-5.3%	
Switzerland	-7.6%	-11.7%	-9.5%	-4.6%	-2.4%	
Turkey	3.2%	-4.8%	-2.1%	4.4%	7.6%	
UK	-9.9%	-10.1%	-8.2%	-3.8%	-1.6%	
Ukraine	-6.7%	-11.2%	-8.6%	-2.8%	0.0%	

B. FORECAST FOR 2009 AND 2010

Table 2 and Table 3 show more details of the forecast shown in Figure 1 and Figure 12.

Table 2. Forecast growth per State, 2009 with details of the forecast range.

State	2009 Forecast	Expected Growth: (15Sep09) Forecast Range			
		Between these values 80% of the time			
		Between these values 50% of the time			
Albania	11.5%	7.9%	9.6%	13.5%	15.3%
Armenia	-8.5%	-12.4%	-10.7%	-6.1%	-3.9%
Austria	-8.1%	-9.8%	-9.0%	-7.3%	-6.4%
Azerbaijan	1.0%	-2.8%	-1.3%	2.5%	4.4%
Belarus	-8.4%	-10.1%	-9.2%	-7.2%	-6.3%
Belgium/Luxembourg	-7.4%	-8.9%	-8.3%	-6.7%	-6.0%
Bosnia & Herzegovina	4.2%	1.4%	2.8%	6.0%	7.5%
Bulgaria	-1.1%	-3.0%	-2.1%	0.2%	1.3%
Canarias	-13.9%	-16.5%	-15.4%	-12.7%	-11.4%
Croatia	3.0%	0.5%	1.7%	4.6%	5.9%
Cyprus	-1.0%	-3.3%	-2.2%	0.3%	1.5%
Czech Republic	-4.8%	-6.6%	-5.7%	-3.8%	-2.9%
Denmark	-8.0%	-10.0%	-9.1%	-7.0%	-6.1%
ESRA	-5.9%	-8.3%	-7.3%	-4.7%	-3.6%
Estonia	-11.8%	-13.8%	-12.8%	-10.4%	-9.4%
FYROM	2.3%	-3.6%	-0.8%	6.0%	9.1%
Finland	-6.8%	-9.2%	-8.1%	-5.4%	-4.2%
France	-7.0%	-8.7%	-7.9%	-6.1%	-5.2%
Georgia	-4.0%	-7.6%	-6.0%	-1.9%	0.0%
Germany	-6.4%	-8.5%	-7.6%	-5.2%	-4.2%
Greece	-0.4%	-2.7%	-1.5%	1.5%	3.0%
Hungary	-2.9%	-4.5%	-3.7%	-2.0%	-1.2%
Iceland	-7.2%	-11.5%	-9.5%	-4.6%	-2.3%
Ireland	-11.1%	-12.9%	-12.0%	-10.0%	-9.1%
Italy	-2.3%	-5.6%	-4.7%	-2.6%	-1.6%
Latvia	-8.1%	-9.9%	-9.0%	-6.9%	-6.0%
Lisbon FIR	-7.1%	-9.0%	-8.1%	-6.2%	-5.3%
Lithuania	-10.9%	-13.4%	-12.2%	-9.0%	-7.6%
Malta	1.1%	-1.6%	-0.4%	2.6%	3.9%
Moldova	7.1%	4.6%	5.8%	8.9%	10.3%
Netherlands	-8.3%	-9.9%	-9.2%	-7.5%	-6.8%
Norway	-4.6%	-6.4%	-5.5%	-3.5%	-2.6%
Poland	-7.3%	-9.9%	-8.7%	-6.0%	-4.8%
Romania	-2.0%	-4.3%	-3.3%	-0.9%	0.2%
S. Maria FIR	0.1%	-2.1%	-1.0%	1.5%	2.7%
Serbia & Montenegro	3.9%	1.8%	2.8%	5.2%	6.2%
Slovakia	-1.8%	-3.9%	-3.0%	-0.7%	0.3%
Slovenia	-3.4%	-5.9%	-4.7%	-2.0%	-0.7%
Spain	-8.3%	-10.6%	-9.6%	-7.2%	-6.1%
Sweden	-10.5%	-12.7%	-11.6%	-9.2%	-8.0%
Switzerland	-6.4%	-8.2%	-7.4%	-5.4%	-4.6%
Turkey	3.1%	0.8%	1.9%	4.4%	5.6%
UK	-8.3%	-10.0%	-9.2%	-7.1%	-6.2%
Ukraine	-7.2%	-9.3%	-8.3%	-6.1%	-5.1%

Table 3. Forecast growth per State, 2010 with details of the forecast range.

State	2010 Forecast	Expected Growth: (15Sep09) Forecast Range			
		Between these values 80% of the time			
		Between these values 50% of the time			
Albania	12.6%	-4.2%	3.6%	21.5%	29.6%
Armenia	-2.9%	-23.7%	-14.3%	8.3%	19.0%
Austria	-1.5%	-10.3%	-6.3%	3.0%	7.4%
Azerbaijan	7.6%	-7.9%	-1.2%	16.2%	25.8%
Belarus	1.6%	-9.6%	-4.7%	9.1%	15.5%
Belgium/Luxembourg	1.1%	-4.8%	-2.2%	4.1%	7.0%
Bosnia & Herzegovina	13.6%	-0.1%	6.3%	21.5%	28.5%
Bulgaria	3.7%	-7.9%	-2.2%	11.1%	17.3%
Canarias	1.2%	-10.2%	-5.6%	6.1%	11.6%
Croatia	9.9%	-5.9%	1.4%	18.4%	26.3%
Cyprus	4.7%	-6.7%	-1.4%	11.5%	17.4%
Czech Republic	1.0%	-9.4%	-4.6%	6.5%	11.7%
Denmark	1.9%	-8.3%	-3.9%	6.6%	11.4%
ESRA	1.8%	-8.0%	-3.9%	6.6%	11.6%
Estonia	-0.5%	-11.8%	-6.7%	8.5%	15.6%
FYROM	8.4%	-29.0%	-11.4%	29.9%	48.9%
Finland	-0.4%	-9.3%	-4.9%	5.9%	10.9%
France	-0.5%	-7.1%	-4.1%	3.4%	6.8%
Georgia	4.8%	-8.5%	-2.7%	13.2%	20.9%
Germany	3.5%	-6.3%	-2.2%	8.2%	13.0%
Greece	5.1%	-5.9%	-0.9%	11.9%	18.2%
Hungary	-0.9%	-9.1%	-5.2%	3.7%	7.9%
Iceland	5.7%	-15.0%	-5.4%	17.5%	28.0%
Ireland	0.4%	-7.6%	-3.7%	5.7%	10.1%
Italy	5.1%	-5.6%	-2.1%	7.0%	11.5%
Latvia	1.1%	-9.4%	-4.4%	7.9%	13.6%
Lisbon FIR	1.6%	-7.0%	-3.1%	6.0%	10.2%
Lithuania	5.4%	-9.8%	-2.9%	16.0%	25.0%
Malta	4.4%	-6.1%	-1.6%	10.3%	15.8%
Moldova	10.4%	1.8%	5.7%	17.1%	22.8%
Netherlands	1.5%	-5.4%	-2.4%	4.5%	7.7%
Norway	1.9%	-5.6%	-2.4%	5.2%	8.7%
Poland	5.2%	-9.1%	-2.7%	13.1%	21.0%
Romania	-0.6%	-12.8%	-7.2%	5.8%	11.7%
S. Maria FIR	4.1%	-3.4%	0.0%	8.8%	13.0%
Serbia & Montenegro	8.8%	-3.6%	2.3%	15.6%	21.7%
Slovakia	0.8%	-11.5%	-5.8%	7.4%	13.5%
Slovenia	3.4%	-12.2%	-4.9%	12.0%	19.7%
Spain	2.7%	-7.8%	-3.8%	7.4%	13.0%
Sweden	0.0%	-12.3%	-6.5%	7.1%	13.2%
Switzerland	3.3%	-5.8%	-1.7%	7.9%	12.2%
Turkey	5.7%	-4.8%	-0.1%	11.0%	16.1%
UK	1.9%	-6.0%	-2.6%	6.2%	10.4%
Ukraine	1.9%	-6.0%	-2.3%	6.5%	10.6%

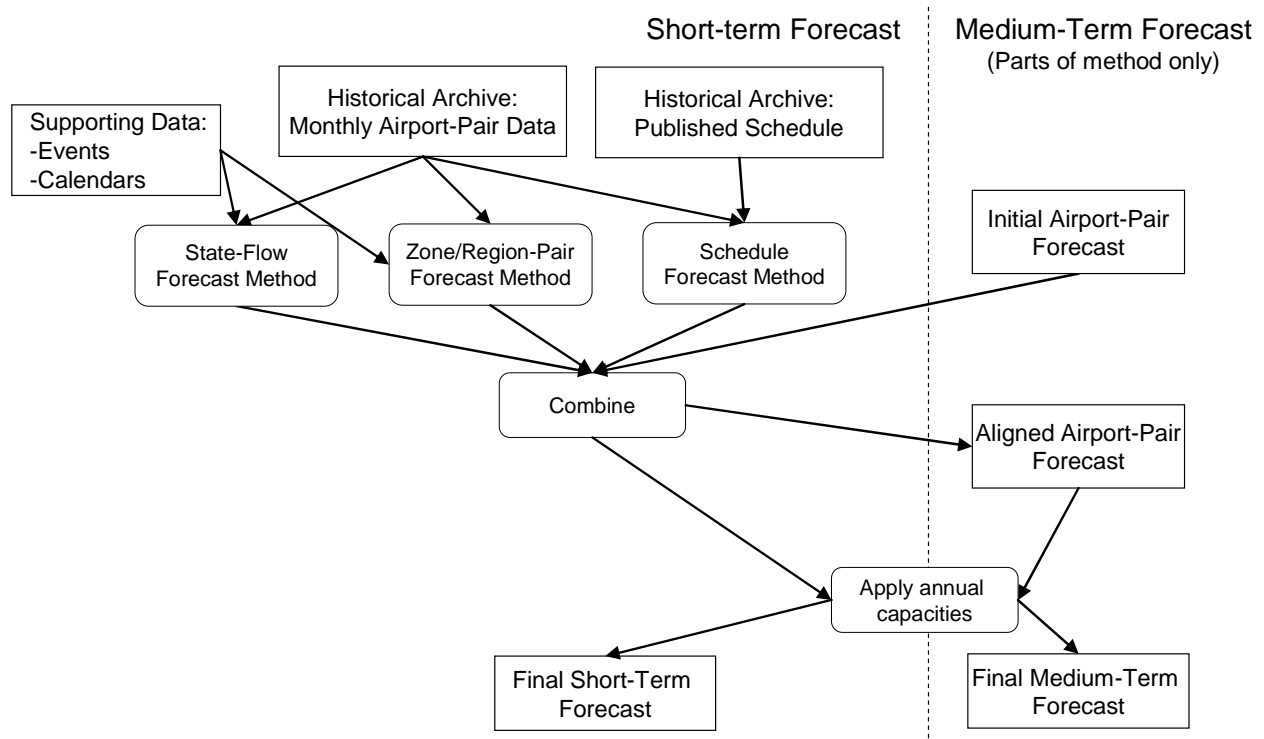
C. NEW SHORT-TERM FORECAST METHOD

The new short-term forecast method combines inputs from several forecasts. Time-series modeling plays a large part. Final traffic is capped to match airport capacities.

The short-term forecast focuses on time-series modeling of traffic trends month-by-month. The final result is in terms of numbers of flights per month per pair of zones or regions: within Europe origin-destination zones are used (groups of airports often smaller than States); outside of Europe, large regions are used (groups of States). Four separate forecasts (with differing horizons and time and geographical resolution) contribute to the forecast as a whole (see Figure 13):

- The State-flow forecast method is the previous method. It has been used for several years for published short-term forecasts. It forecasts each State separately, and within the State, separate forecasts for a few main 'flows': internals, overflights etc.
- The zone or region-pair forecast is largely based on time-series methods for some 8000 series.
- The schedule method uses data from published schedules for future months, and comparisons of previous schedules with actual flights.
- The first three years of the medium-term forecast also contribute a view of future traffic.
- The combined forecast is then capped by airport capacities, using the same method as used in the medium- and long-term forecasts.

Figure 13. Summary of short-term forecast method.



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