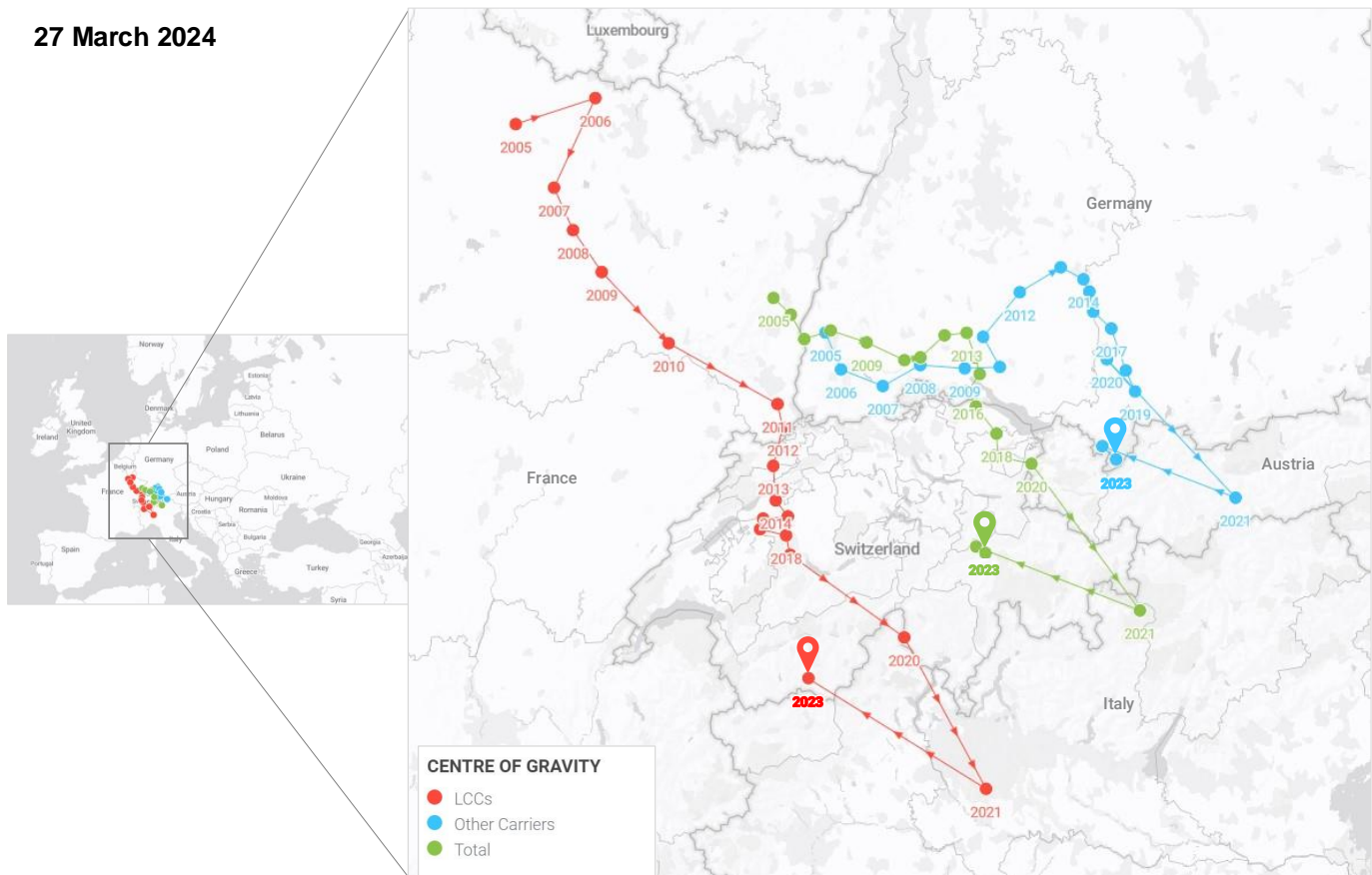


EUROCONTROL Data Snapshot

The centre of gravity of European aviation is shifting towards south and east.

27 March 2024



In this Data Snapshot we look at how European aviation has changed over the last 20 years by considering its *centre of gravity*¹ – the geographic point that is the average of all the departure points across Europe.

The map shows that it has been incrementally shifting towards the east and south since 2005, culminating in 2021 for both low-cost carriers (LCCs) and other carriers² (such as traditional or legacy airlines). The extreme point, in 2021, mainly reflects an uneven recovery from the COVID-19 pandemic, with less stringent measures in South and East Europe (see [Think Paper #15](#)). In 2022/23, the centre of gravity moved back north and west following the post-COVID recovery, and the unavailability of Ukraine's and Russia's airspaces due to the war in Ukraine.

The LCCs' centre of gravity has been moving farther south in an almost straight line due to their rapid expansion in southern Europe. On the other hand, the other carriers have been showing a less stable pattern shaped by several major airlines' bankruptcies such as Alitalia, MALÉV, Spanair and Air Berlin. Both factors contributed to the LCCs' market share increase from 17% in 2005 to 42% of all passenger flights departing from the ECAC area in 2023, pulling the total centre of gravity towards the south.

Based on [the latest 7-year forecast for 2024–2030](#), it is expected that the analysed trends will continue. The ECAC South-East region³ will likely be the fastest-growing region in the coming years, expected to record an average annual flight growth of its 3% ($\pm 1\%$) by 2030. This will be followed by ECAC South-West with 2.8% ($\pm 0.9\%$), North-East with 2.6% ($\pm 0.9\%$), and, finally, North-West with 2.2% ($\pm 0.7\%$).

Technical Bits:

1. The centre of gravity is defined as the average geographical location of all ECAC departing airports weighted by the yearly number of departing passenger flights.
2. Other carriers stand for Mainline, Regional and Non-scheduled airlines according to the EUROCONTROL Market segments classification. The market segments definition can be found [here](#).
3. The ECAC regions definition used can be found [here](#).