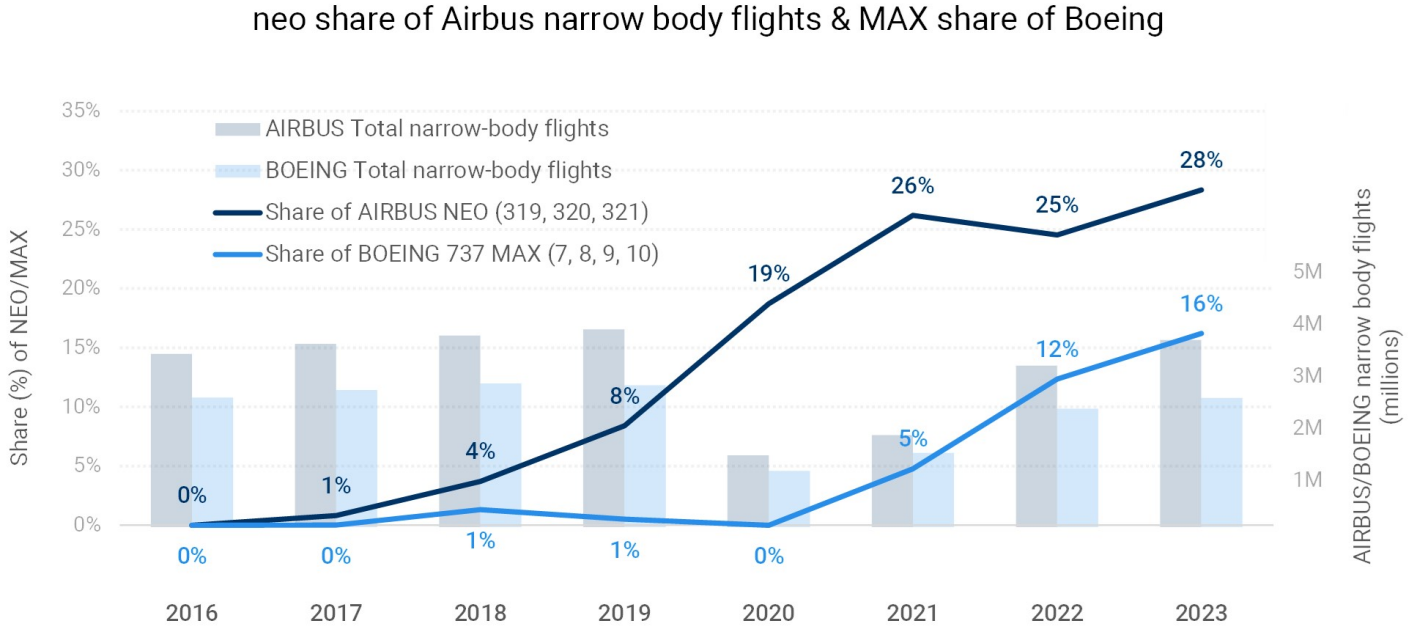
EUROCONTROL Data Snapshot

Growth of new generation of narrow bodies

08 March 2024



Fleet renewal is an important contributor to making aviation more sustainable, as aircraft manufacturers strive to produce quieter and more fuel-efficient aircraft. In Europe, almost two thirds of flights are flown with narrow-body aircraft and thus, to a large extent, the fleet renewal is exemplified by the growing use of the new generation of narrow bodies, in particular, the Airbus 320neo and the Boeing 737MAX families.

According to the manufacturers, this new generation of aircraft produce around 20% less CO_2 emissions per seat and a 50% reduced noise footprint compared to their predecessors. Additionally, they can be configured for a higher number of seats and longer flight ranges, so they bring both environmental and economic benefits.

In January 2016, Europe saw the first commercial flight of an A320neo. Since then, the share of flights by the A320neo family has steadily increased, reaching **28%** of all Airbus narrow-body flights in 2023. We can see how during the COVID years (2020-2021), this share spiked as, with the low traffic demand, operators chose to 'park' their older, less efficient aircraft and use the new types. The situation normalised from 2022 onwards as demand gradually recovered and operators had to make use of their entire fleet.

The maiden commercial flight of a B737MAX in Europe took place in September 2017, but the road has been quite bumpy since then. The Lion Air and Ethiopian Airlines accidents precipitated the grounding of the 737MAX which, in Europe, lasted from March 2019 until January 2021. Since then, we have seen a sharp increase in usage, reaching **16%** by the end of 2023, when new technical issues became apparent.

In 2023, 571 A320neo and 387 B737MAX were delivered worldwide; their combined orders for the next five years are growing an average of 14% every year, showing the demand for these aircraft. The capability of aircraft and engine manufacturers to cope with this demand will be key for the progress of the fleet renewal but also for the operators' ability to respond to the traffic growth expected in the next five years.

Despite the current geopolitical situation, the latest EUROCONTROL Forecast is for traffic growth of 4.9% (±2.3pp) in 2024 at ECAC level, and annual growth of more than 2% until 2028. Aircraft operators will need to continue renewing and adding to their fleet if they are to meet this demand while also contributing to the European aviation environmental targets.

Technical bits: The area considered for the analysis is the analysis is the EUROCONTROL area.
The A320neo family includes the A319, A320 and A321. The B737MAX family includes the MAX 7, 8, 9 and 10.
Orders and deliveries data provided by Cirium.