EUROCONTROL

SUPPORTING
EUROPEAN
AVIATION

EUROCONTROL FORECAST 2026-2032

Autumn 2026

CONSORTIUM COORDINATOR sesar DEPLOYMENT MANAGER

FOUNDING MEMBER sesar JOINT UNDERTAKING

NETWORK MANAGER

Inputs and Assumptions

This forecast replaces the Spring 2026 forecast.

The Autumn 2026 forecast covers the 2026-2032 horizon. It includes **three scenarios** and incorporates:

1

Traffic trends up to 30 September 2026

ECAC flights were **1.7% above** 2025 through September.

Monthly growth turned negative in April (−1.1%) after the Middle East disruption, then recovered to +2.8% in July.

Most additional flights came from southern and eastern States.

2

Selected updates of the forecast inputs

Several inputs have been updated, including the **economic forecast** from Oxford Economics (August 2026), **upcoming events** and **airport capacity** assumptions.

All other inputs remain unchanged from the Spring 2026 publication.

Technical assumption: Future traffic evolution is based on **scenario-specific assumptions** regarding the duration and the pace of recovery from geopolitical tensions in the Middle East.

3

Routing and assumptions about airspace

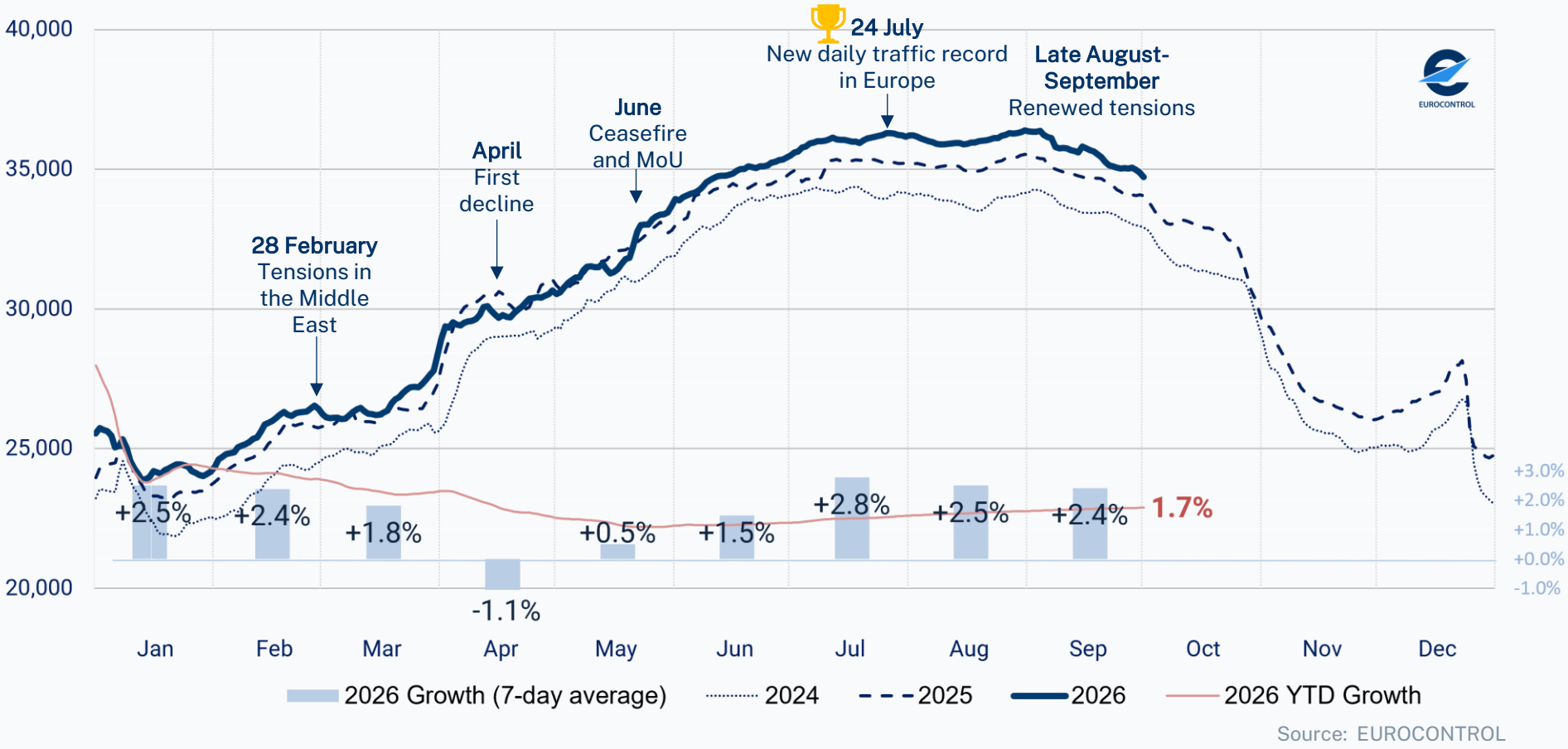
Recent routing patterns set the overflight baseline: The latest three months for flights to and from the Middle East, Russia and Asia to capture recent route changes; The latest twelve months for all other flights.

Technical assumption on routings over the 2026-2032 period: It is impossible to predict when currently restricted airspaces will be fully reopened. This forecast has therefore been prepared using the recent status as a baseline. This should not be interpreted as a prediction on the part of EUROCONTROL of any future evolution of these restrictions.

2026 traffic: growth continues, but the picture has changed

Traffic has remained resilient despite significant disruptions since the Spring forecast.

Daily IFR Movements (7-day moving average) and monthly growth for ECAC (total flights)



Source: EUROCONTROL

Key messages

The first-quarter remained relatively strong despite the emergence of tensions in the Middle East.

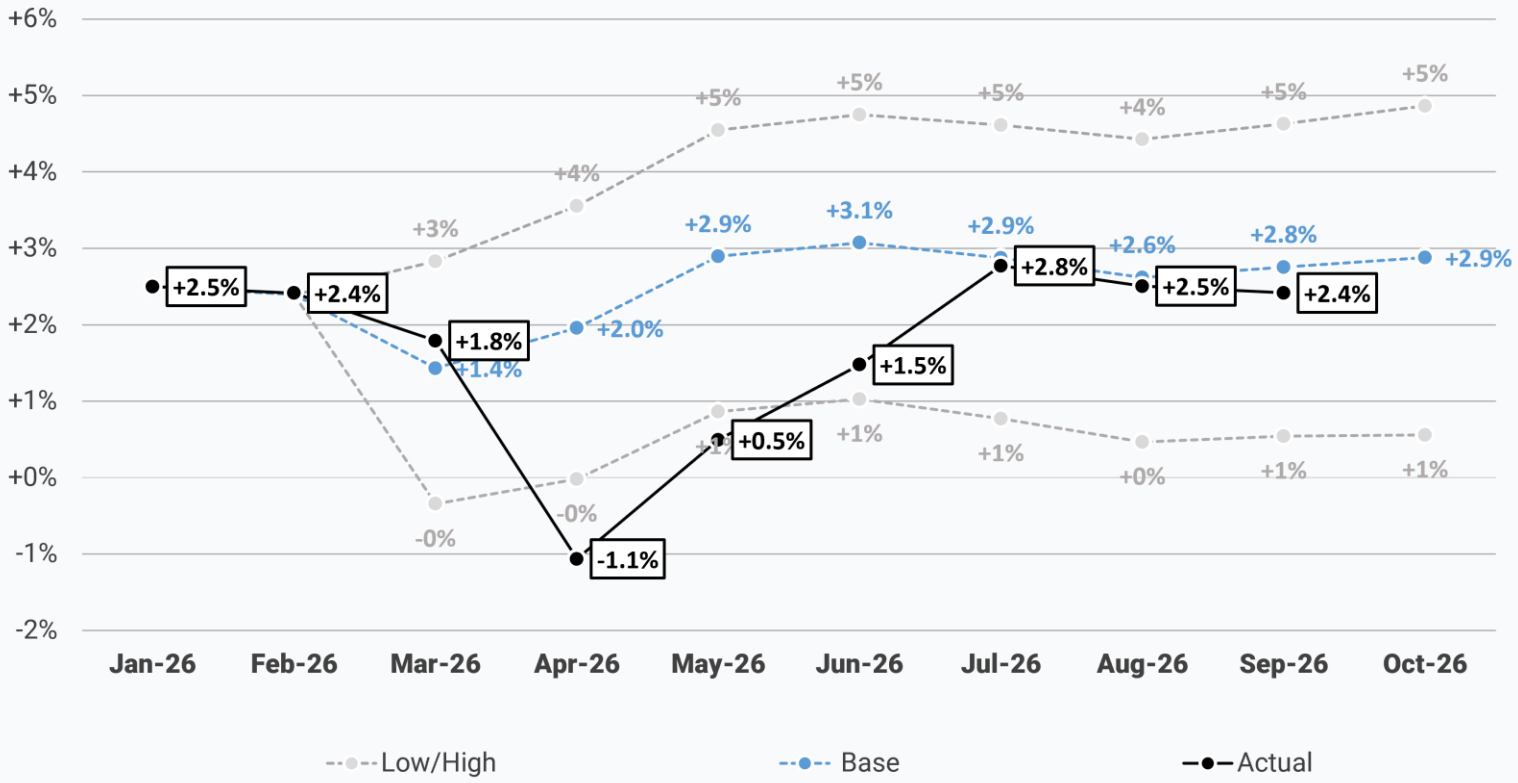
Traffic growth slowed in the second quarter, with the first decline in April, followed by a gradual recovery.

Summer months (June to September) recorded 2.3% growth despite renewed tensions, with a new daily traffic record set on 24 July.

Spring forecast performance

The peak impact of the Middle East crisis was underestimated, but traffic growth has since realigned with the Spring forecast.

EUROCONTROL Monthly Traffic Forecast (STATFOR – Spring 2026)
(ECAC area, vs previous year)



Source: EUROCONTROL

Key messages

First quarter traffic growth was broadly in line with the March base forecast, despite emerging tensions in the Middle East.

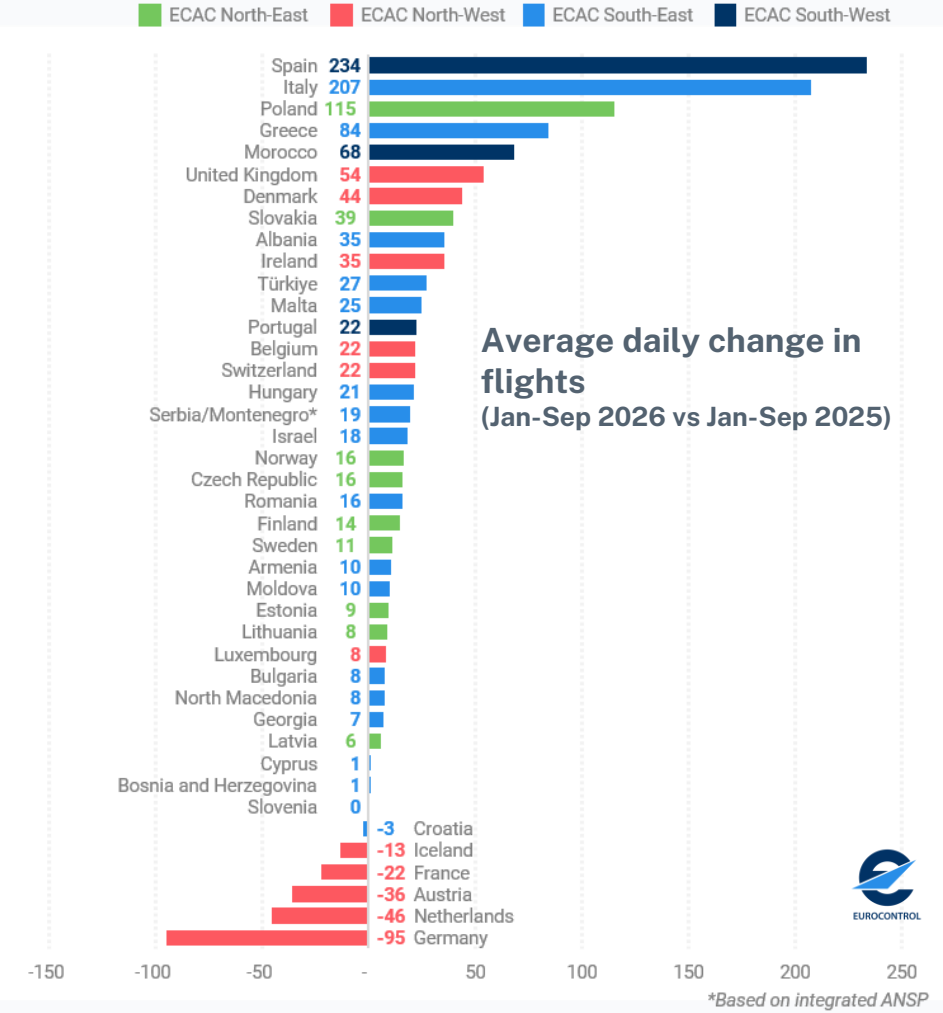
Traffic growth in April and May was weaker than anticipated, as the impact and duration of the tensions in the Middle East were underestimated. June traffic growth remained below the base forecast, with actual figures closest to the low scenario.

Since July, traffic growth has been closely aligned with the Spring base forecast.

Note: Deviations vary significantly by traffic zone and traffic type.

ECAC growth is increasingly driven by a few key markets

Additional flights are mainly generated by southern and eastern European States, while major northwestern markets are lagging behind.



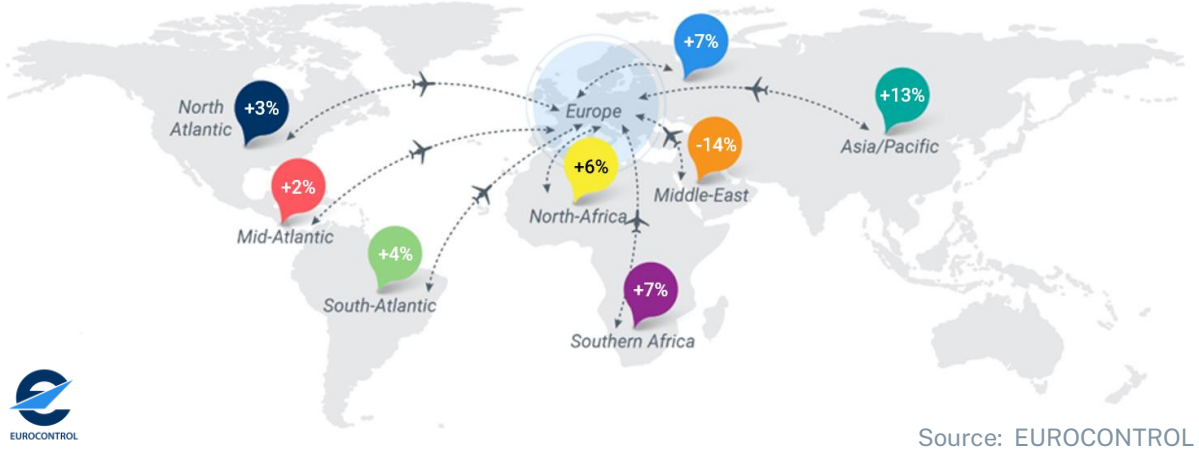
Source: EUROCONTROL

Growth is shifting south and east: weaker economic growth and increased taxation are weighing on air travel demand. This has contributed to sluggish arrivals, departures, and domestic traffic in several mature northwestern European markets, while southern and eastern Europe continue to record stronger growth.

Intra-European traffic remains the main growth contributor, while extra-European traffic shows only modest overall growth and large differences across flows.

Strong growth towards **Asia/Pacific and North Africa** is partly offset by the sharp decline in **Middle East** traffic.

Growth in Extra-European flows (Jan-Sep 2026 vs Jan-Sep 2025)



Source: EUROCONTROL

ECAC growth masks contrasting airline traffic trends

Low cost carriers continue to expand, while Regional, Non-scheduled and All-cargo traffic segments record fewer flights, highlighting diverging trends across airline groups.

Flight growth by market segment (Jan-Sep 2026 vs Jan-Sep 2025)

No.	Market segment	Avg. daily flights	% prev year
1.	Low Cost	11,511	+4%
2.	Mainline	10,883	+2%
3.	Regional	3,574	-5%
4.	Business	2,215	+1%
5.	Other	1,041	+7%
6.	All-cargo	973	-1%
7.	Non-Scheduled	832	-11%
8.	Military	578	+13%

Source: EUROCONTROL

Airline dynamics remain highly differentiated: Low-cost carriers continue to outperform, while Regional, Non-Scheduled and All-cargo flights decline. Performance also varies significantly across major airline groups, with Wizz Air standing out at +20%. airBaltic operations are expected to decline by around 10% in the near term, from a baseline of approximately 130–140 flights per day.

Top contributing aircraft operators (Jan-Sep 2026 vs Jan-Sep 2025)

No.	Aircraft operator	Average daily flights	% prev year
1.	Ryanair Group	3,434	+5%
2.	easyJet Group	1,666	+2%
3.	Turkish Airlines Group	1,618	+4%
4.	Air France Group	1,084	+1%
5.	Wizz Air Group	1,083	+20%
6.	Lufthansa Airlines	1,045	-9%
7.	KLM Group	882	-1%
8.	British Airways Group	833	-2%
9.	SAS Group	744	+7%
10.	Vueling	631	-1%

Source: EUROCONTROL

EUROCONTROL FORECAST 2026-2032

Geopolitics has reshaped European traffic flows

Ongoing tensions in the Middle East have caused both direct traffic loss and major reroutings.

The tensions in the Middle East are estimated to reduce ECAC traffic by approximately **110,000 movements in 2026 compared with a hypothetical 'no-tensions' scenario:**

≈90,000
Arrivals/departures

≈20,000
overflights ----✈

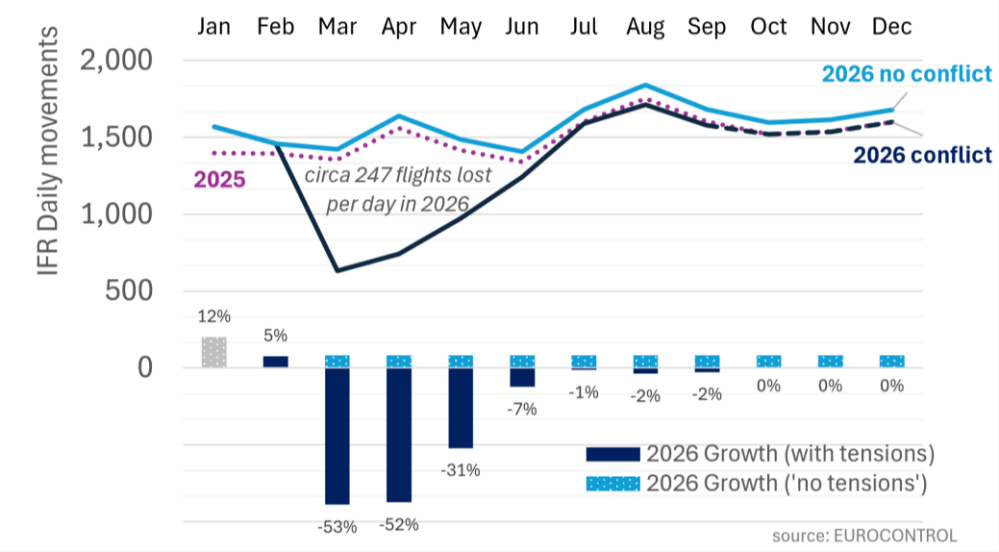
- **Flight losses were concentrated in March-May**, with ECAC ↔ Middle East traffic recovering to near-2025 levels by July–August.
- **The overflight impact has been more persistent**, particularly on the North America ↔ Middle East flow, while rerouting has redistributed traffic across the ECAC network.

→ The **crisis therefore affects both the 2026 traffic base and the geographical distribution of flights** across Europe, with gradual stabilisation assumed by the end of Q1 2027 under the base scenario, and further escalation considered in the low scenario.

1. Direct traffic impact (Arrivals/Departures)

~90,000 estimated arrival/departure movements lost in 2026 vs a 'no Middle East tensions' scenario.

ECAC ↔ Middle East (Arrivals + Departures)

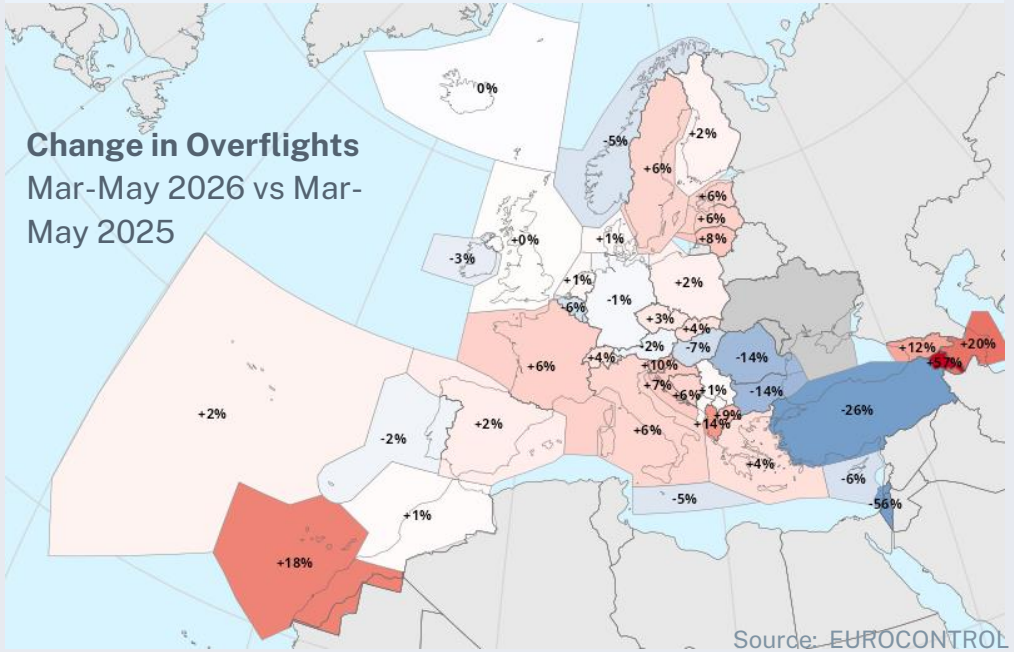


Estimation of losses based on counterfactual assumptions:

- **'No Middle East tensions' scenario:** Underlying monthly growth of 5% over the period March to December 2026 (vs 2025).
- **'With ongoing Middle East tensions' scenario:** January-September 2026: actual growth, then 0% assumed for Q4 2026 (vs Q4 2025).

2. Rerouting impact (Overflights)

~20,000 estimated overflights lost in 2026 vs a 'no Middle East tensions' scenario.



Estimation of losses based on counterfactual assumptions:

- **'No Middle East tensions' scenario:** Underlying overflight traffic broadly stable: 0% from March to December 2026 (vs 2025).
- **'With ongoing Middle East tensions' scenario:** January-September 2026: actual decline, then -20% assumed for Q4 2026 (vs Q4 2025). The most affected flow is North America ↔ Middle East (accounting for 40% of Middle East-related overflights).

EUROCONTROL FORECAST 2026-2032

Jet fuel prices rise again, but the shock is expected to ease

Renewed geopolitical tensions have pushed jet fuel prices sharply higher, while current energy outlooks still point to a gradual normalisation beyond 2026.

The fuel shock has intensified since the previous forecast, increasing near-term airline costs:

Jet fuel (global average)

USD 187/bbl

+8% week-on-week (week to 2 Oct 2026)

Jet fuel (Europe)

USD 196/bbl

+15% week-on-week (week to 2 Oct 2026)

Source: IATA, S&P Global Platts

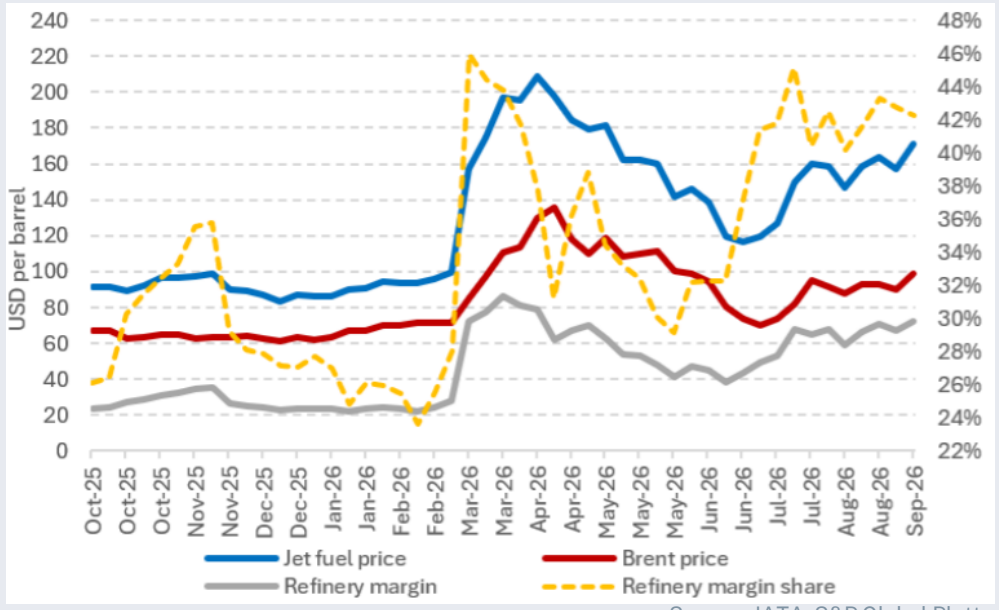
- **Fuel accounts for 31% of airline operating costs in 2026**, up from 25% in 2025. (Source: IATA, September 2026)
- **Higher fuel costs create both supply and demand-side pressures**, potentially affecting airline capacity decisions, ticket prices and passenger demand.

→ **The Base scenario assumes a gradual easing of energy prices in 2027**, but prolonged market disruption remains an important downside risk.

1. The near-term shock has intensified

Jet fuel prices have risen sharply again since mid-2026.

Global average jet fuel prices and refinery margin
(USD per barrel, Oct 2025 to Sep 2026)



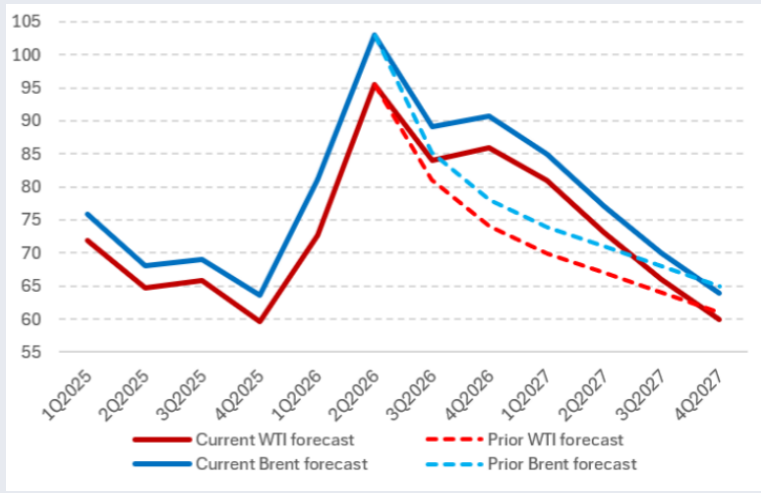
Source: IATA, S&P Global Platts

- Renewed Middle East tensions and attacks on energy infrastructures have pushed crude and jet fuel prices higher again.
- Jet fuel prices are currently at their highest level since mid-2022, with Europe particularly affected.

2. Fuel cost pressures are expected to ease beyond 2026

The near-term outlook has been revised upwards, but prices are still expected to decline through 2027, before stabilising.

US EIA Brent and WTI spot price forecast comparison
(USD per barrel, Sep 2026 vs Aug 2026)



Source: US Energy Information Administration

- The near-term oil outlook has been revised upwards, but significant easing is still expected in 2027.
- However, prolonged disruptions in energy markets could delay this easing, keeping jet fuel prices elevated for longer and adding further pressure on airline costs.

En-route service units were directly affected by lower Middle East traffic volumes and changing traffic flows.

- Reduced traffic to the Middle East has **lowered the number of heavy aircraft** operating within the ECAC network, resulting in **fewer service units**.
- Changes in routes have also **shortened the distances flown by some overflights**. This has **amplified service unit losses** in States experiencing traffic declines, while **limiting the gains** in States receiving additional traffic, despite the higher average aircraft weight.

The weight and distance impacts are more persistent:

Flight growth

~1.6%

Jan-Aug 2026 vs Jan-Aug 2025

En-route Service Unit growth

~0.5%

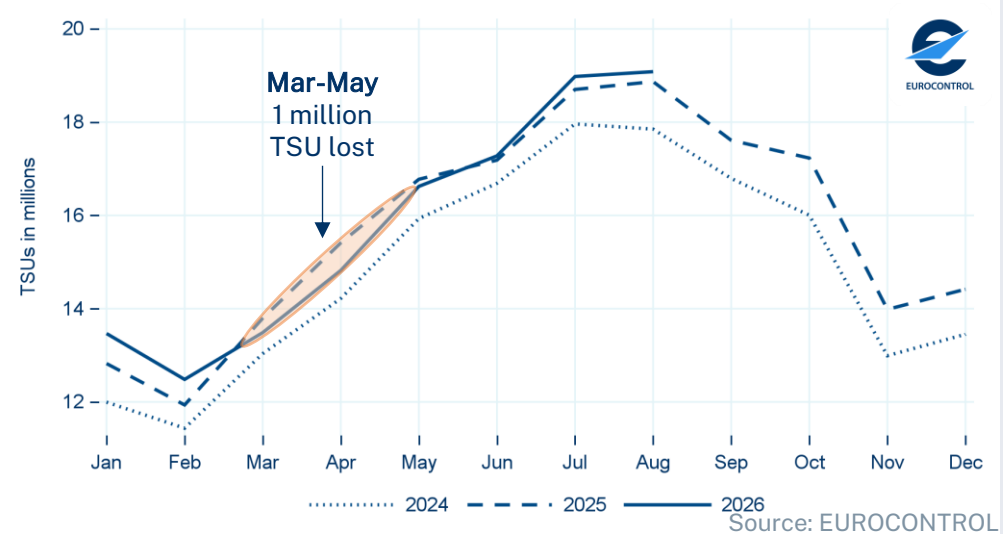
Jan-Aug 2026 vs Jan-Aug 2025

→ The overall outlook points to slower growth in Service Units than in flights in 2026.

1. Weak Service Unit growth since March

~1 million fewer en-route Service Units in 2026 between March and May compared to the same period in 2025.

Total En-route Service Units (TSU) in CRCO°



Source: EUROCONTROL

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

Assumptions in the En-route Service Units forecast

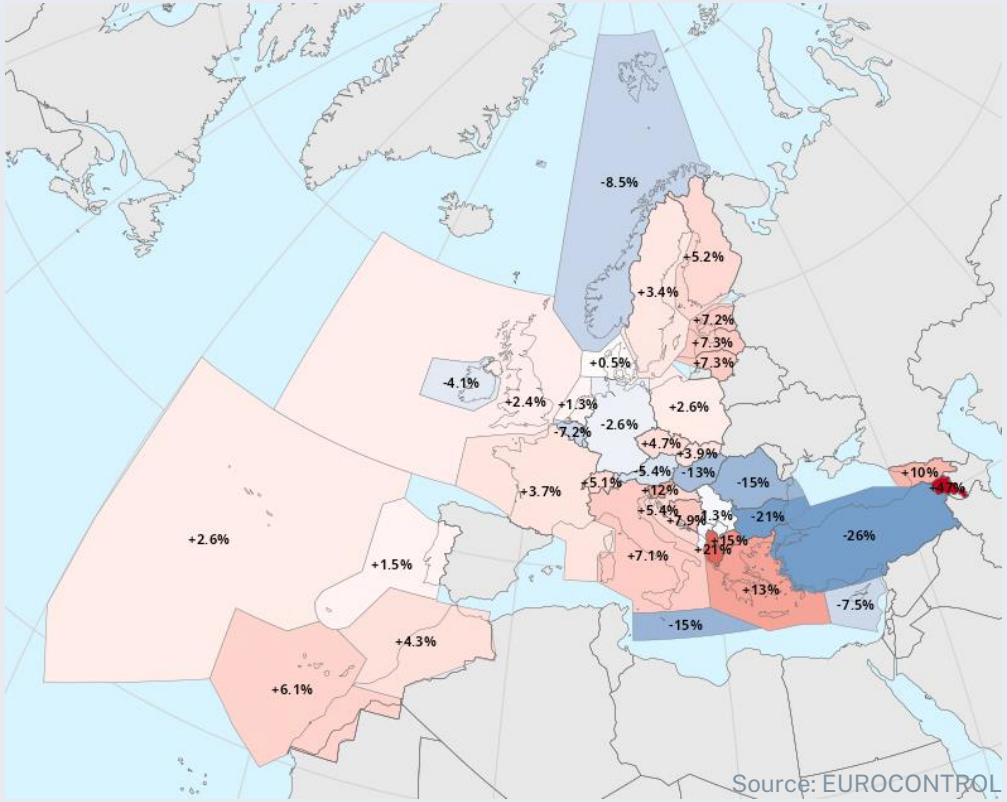
- **Growth of 1%** is now assumed for September-December 2026 compared to September-December 2025.
- **By comparison,** the 'no Middle East tensions' scenario assumes **3.5% growth** in September-December 2026 compared with the same period in 2025.

2. Rerouting impact (Overflights)

More decline in Service Units between March and May for States losing overflights, but not systematically more growth in Service Units for those States gaining overflights.

Change in En-route Service Units

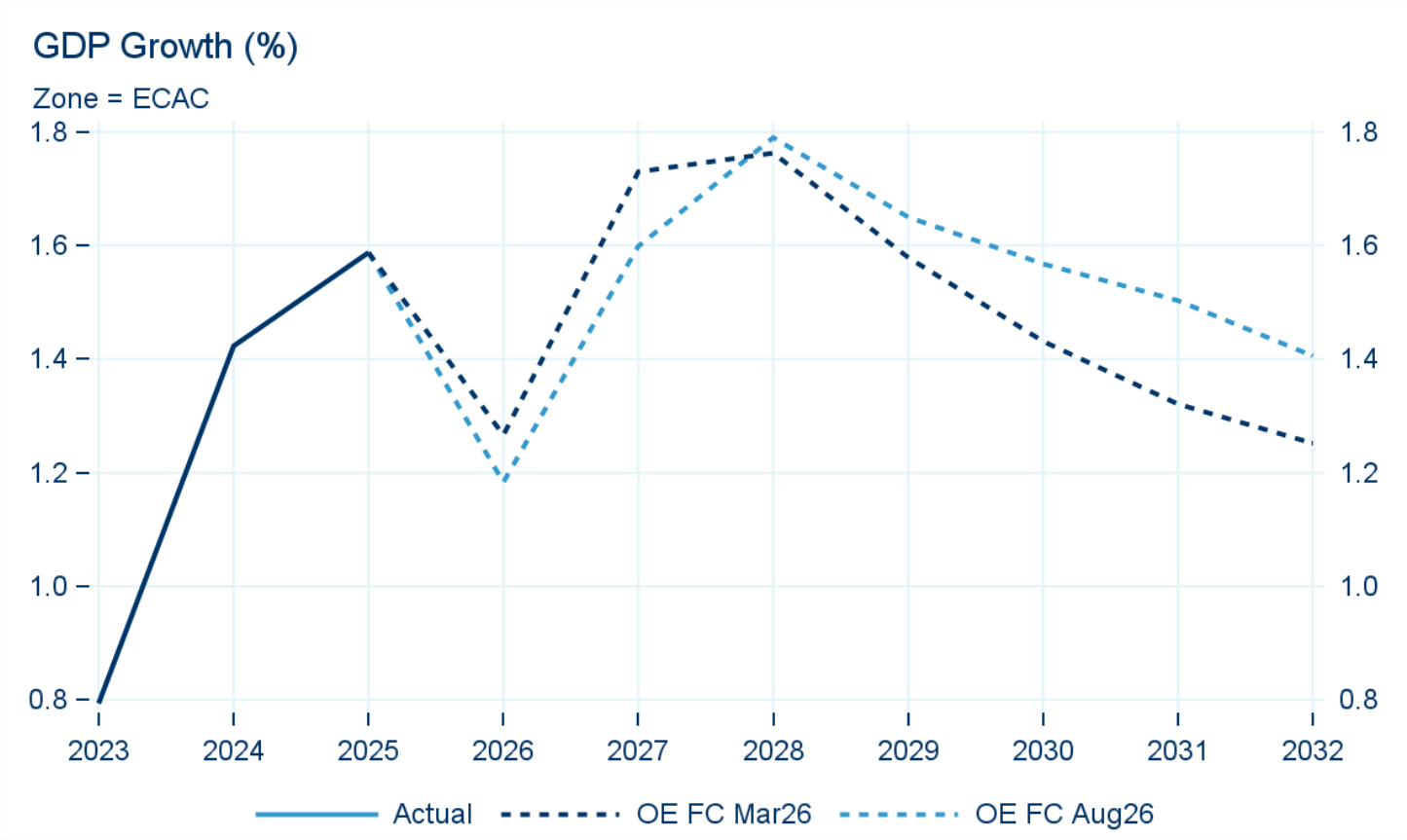
Mar-May 2026 vs Mar-May 2025



Source: EUROCONTROL

A slightly weaker economic outlook adds to the downside

The August 2026 economic outlook is softer, but does not by itself explain the change in the flight outlook.



Source: Oxford Economics Ltd, March and August 2026 releases.

Key messages

- **The ECAC GDP outlook has been revised downwards in the short term**, with weaker growth now expected in 2026 and 2027 compared with the March release used for the previous forecast.
- **The global economy remains resilient, despite slowing growth momentum**. According to the WEF September 2026 Chief Economists' Outlook, 56% of surveyed economists expect global economic conditions to remain stable or improve over the next 12 months.
- **From 2028 onwards, the picture reverses**, with the August economic outlook becoming progressively stronger than the March release, and the positive gap widening towards the end of the horizon.
- This **revised economic outlook partly supports** the shape of the flight forecast revision.
- **GDP is only one of the drivers of the traffic revision**. Aviation-specific developments and assumptions remain important in explaining both the near-term downgrade and the evolution over the rest of the horizon.

Structural factors will shape the forecast outlook

Beyond the current shocks, structural developments will increasingly shape how and where flight growth materialises.

Air fares and demand resilience

Broadly stable

European air fares have remained broadly stable in real terms so far in 2026, despite mounting upward pressure and some recent price increases.

Demand has remained resilient, although further fare increases could weigh on future growth.

Source: EUROSTAT, data up to August 2026.

Airport capacity constraints

165,000 flights

By 2032, an estimated 1.3% of flights are likely to be unaccommodated across European airports under the base scenario in the forecast.

Capacity constraints at airports are increasingly limiting flight growth, depending on the scenario.

Source: EUROCONTROL 7-Year Forecast 2026-2032, Autumn 2026.

Fleet renewal & productivity

≈273 aircraft/year

Aircraft deliveries are expected to average 273 per year (2026-2032), with narrowbody jets accounting for 88% of total deliveries.

Average aircraft size is projected to increase by 0.5% annually, from 199 to 206 seats.

Source: Cirium Fleet Forecast, April 2026; EUROCONTROL STATFOR analysis.

Higher load factors

84.5%

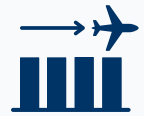
In 2026, passenger load factors stood at 84.5% year-to-date to August (+0.4 pp vs the same period in 2025).

High load factors absorb more demand with fewer flights, but reduce the spare capacity available to accommodate future growth.

Source: IATA, data up to August 2026.

Impact on the new forecast (I)

Short-term shocks weigh on 2026, while easing pressures and structural developments support a more balanced outlook thereafter.

DRIVER	ASSUMPTION FOR THE NEW FORECAST (BASE scenario)	EXPECTED EFFECT ON FLIGHTS SHORT TERM (2026–2027)	EXPECTED EFFECT ON FLIGHTS MEDIUM TERM (2028–2032)
Economy	August 2026 Oxford Economics baseline, with weaker growth in 2026–2027 than previously expected, followed by a more favourable outlook from 2028 onwards.		
Middle East geopolitics	Continued disruption to Middle East traffic and flight routings in 2026, with gradual stabilisation assumed by the end of Q1 2027 under the base scenario.		
Fuel	Elevated jet fuel prices in 2026, with significant easing expected in 2027, based on the latest EIA outlook.		
Russia / Ukraine airspace	Current airspace restrictions and associated routing patterns maintained as the forecast baseline, with no reopening date assumed.		
Air fares & demand resilience	European air fares broadly stable in real terms so far in 2026, but under growing upward pressure, with recent increases emerging as airlines are beginning to pass higher costs on to passengers.		

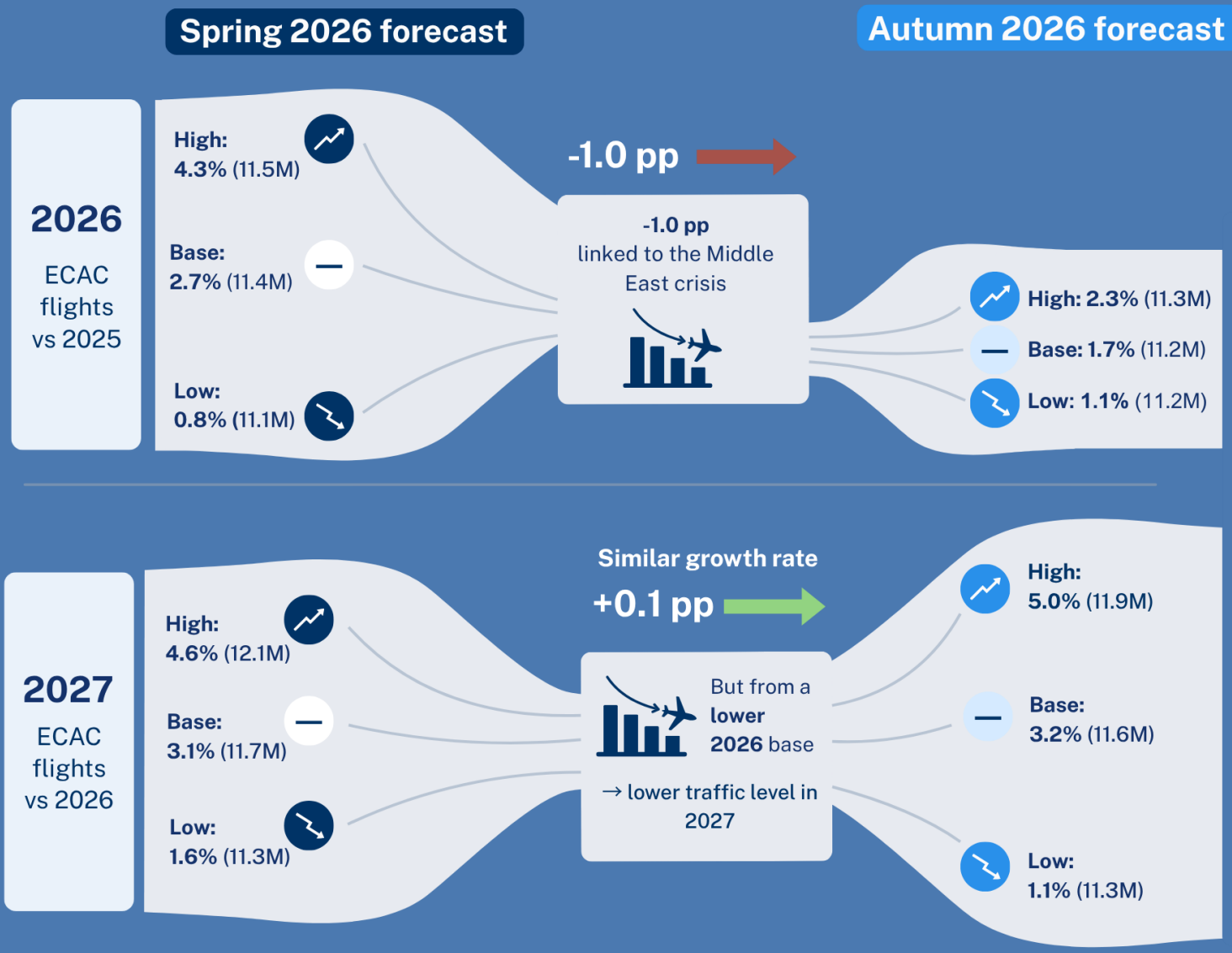
Impact on the new forecast (II)

Short-term shocks weigh on 2026, while easing pressures and structural developments support a more balanced outlook thereafter.

DRIVER	ASSUMPTION FOR THE NEW FORECAST	EXPECTED EFFECT ON FLIGHTS SHORT TERM (2026-2027)	EXPECTED EFFECT ON FLIGHTS MEDIUM TERM (2028-2032)
Airport capacity	Increasing airport capacity constraints reflected in the forecast assumptions, limiting potential traffic growth.		
Fleet renewal & productivity	Around 273 aircraft deliveries per year over 2026–2032, with 88% of these narrowbody jets. Average aircraft size increases by 0.5% annually, from 199 to 206 seats.		
Higher load factors	Passenger load factors remain historically high, reaching 84.5% year-to-date to August 2026 (+0.4 pp year-on-year). While supporting efficient capacity utilisation, they leave limited scope to absorb additional passenger demand without increasing flight frequencies or aircraft capacity.		

Uncertainty | Part of the uncertainty around these drivers is reflected in the Low, Base and High scenarios. Unforeseen shocks (e.g. geopolitical developments, economic or energy market changes, further airspace restrictions) remain additional risks.

Lower starting point, gradual convergence

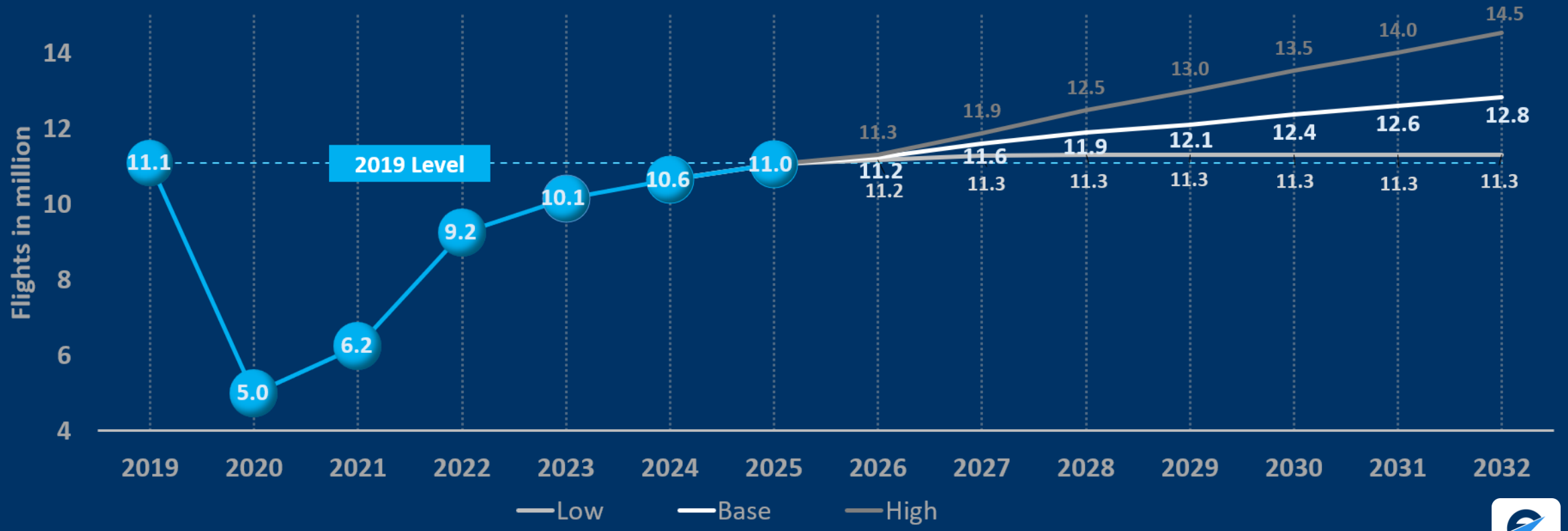


2026 growth revised down by 1.0 pp, mainly due to the Middle East crisis and associated effects, while the 2027 growth rate is revised up slightly (+0.1 pp) from a lower base.

From 2028 to 2032, the average annual growth rate remains broadly unchanged, with traffic levels gradually converging towards the Spring 2026 forecast.

EUROCONTROL 7-Year Forecast Update for Europe* 2026-2032 (Autumn 2026)

Actual and future IFR movements

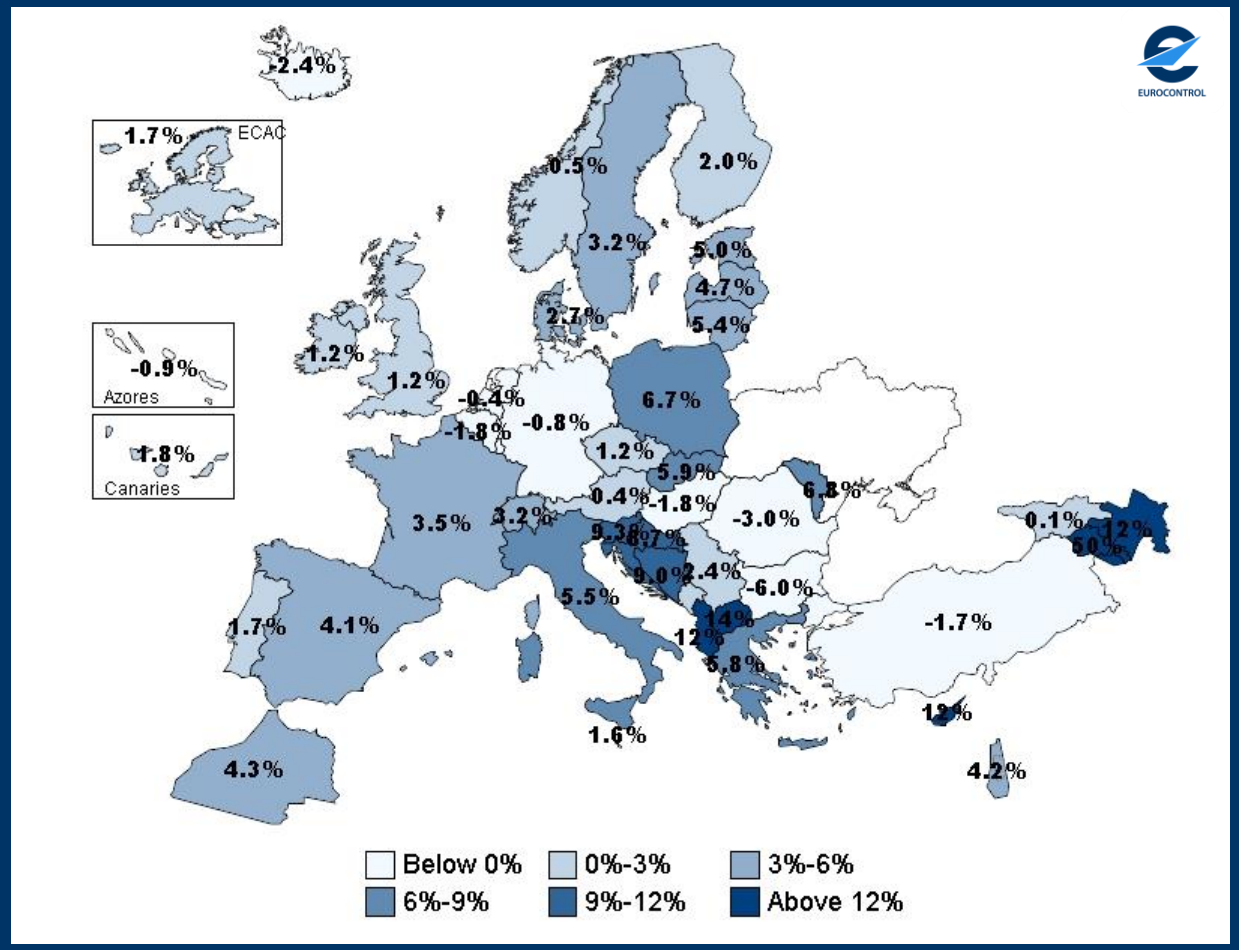


* Europe refers to the 44 ECAC Member States.

Source: *EUROCONTROL 7-Year Forecast 2026-2032, Autumn 2026*

EUROCONTROL Flight Forecast Update for 2026

ECAC growth revised down to +1.7% (±0.6 pp)



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.

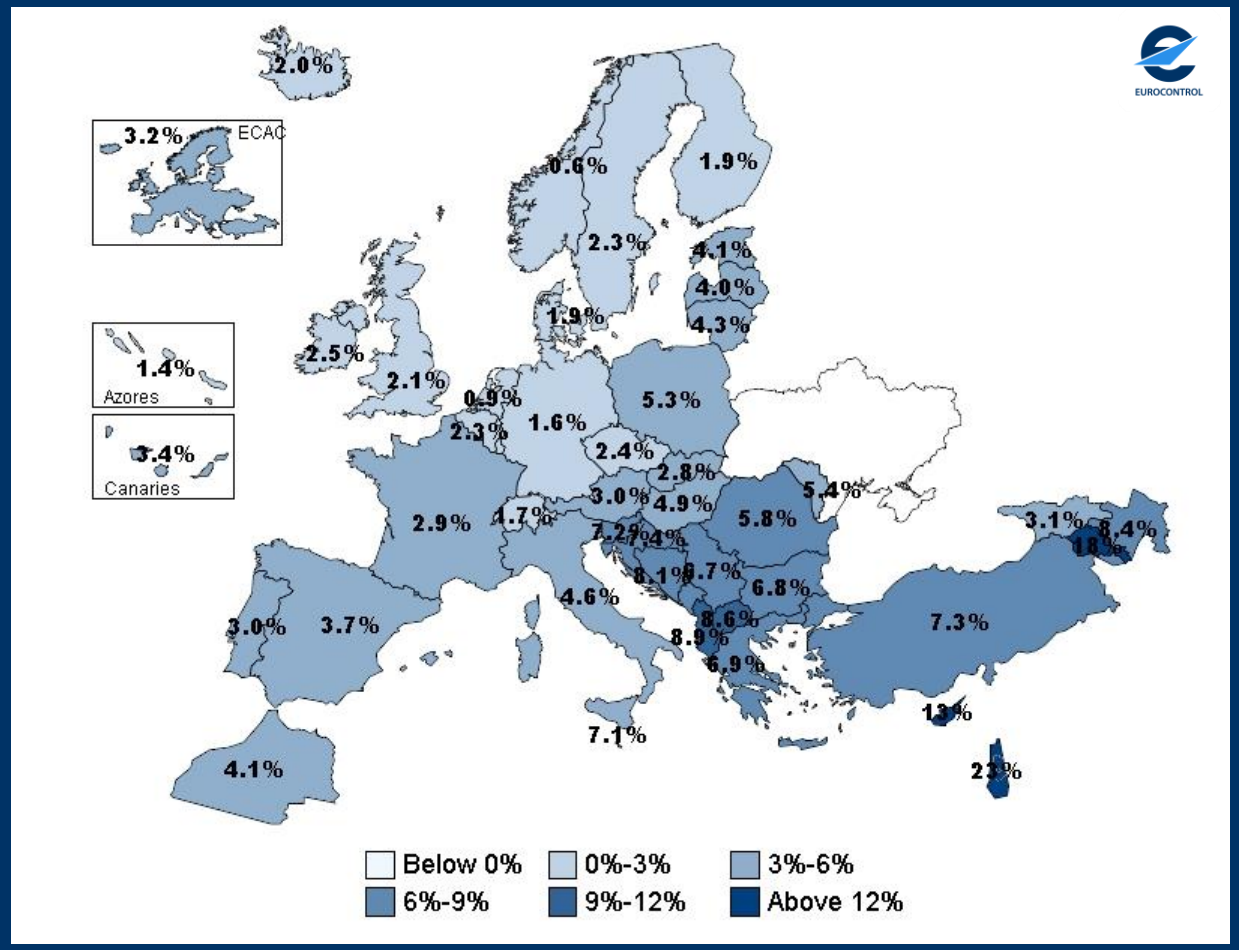
Key messages

- **ECAC traffic is expected to grow by +1.7% in 2026 (±0.6 pp),** down from +2.7% in the Spring forecast, based on the latest traffic developments through September.
- **The downward revision largely reflects the impact of the Middle East crisis**, affecting traffic demand and flight routings across Europe.
- **The largest downward revisions are observed in Bulgaria (-8.1 pp), Türkiye (-5.9 pp) and Germany (-2.4 pp),** highlighting significant differences across European markets.
- **Southern Europe shows stronger than previously expected growth,** notably Greece (+3.1 pp), Italy (+1.0 pp) and Spain (+0.9 pp), contrasting with weaker developments in parts of northwestern and eastern Europe.
- **Higher fuel costs, operational disruptions and geopolitical uncertainty have also affected traffic developments in 2026**, with impacts varying significantly across the ECAC network.

Source:
EUROCONTROL 7-Year Forecast 2026-2032, Autumn 2026

EUROCONTROL Flight Forecast Update for 2027

ECAC +3.2% (±2.0 pp for the low-to-high range)



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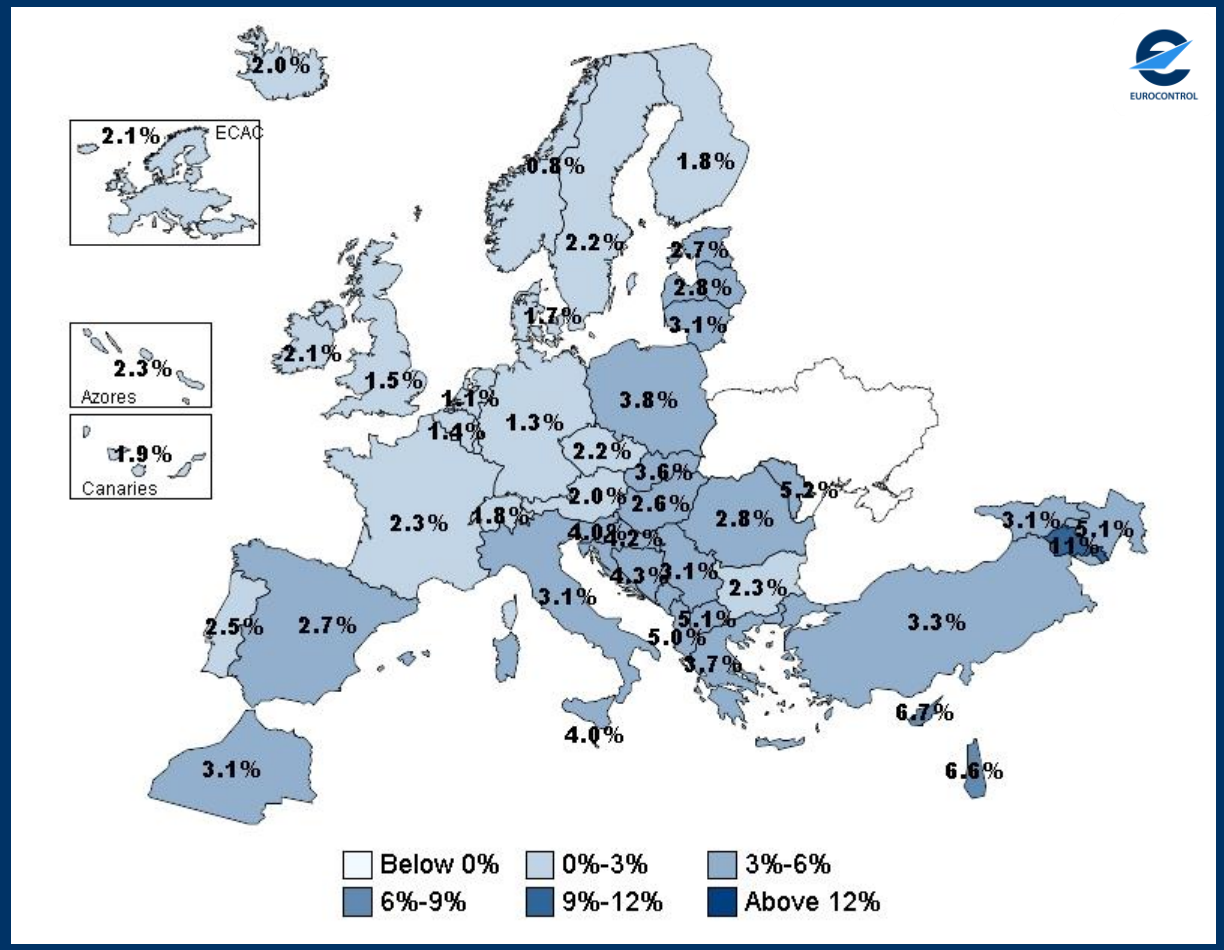
Key messages

- **ECAC traffic is expected to grow by +3.2% in 2027 (±2.0 pp),** reaching approximately 11.6 million flights.
- **Growth remains broadly in line with the Spring forecast (+3.1%),** but from a lower 2026 traffic base, resulting in fewer flights in absolute terms than previously anticipated.
- **A gradual recovery is expected during 2027,** assuming improving stability in the Middle East, and a progressive easing of disruptions affecting traffic demand and flight routings.
- **Growth is expected to be stronger in southern and eastern Europe**, notably in Türkiye (+7.3%), Greece (+6.9%) and several Balkan markets, while northwestern Europe remains more moderate.
- **The recovery remains subject to significant geopolitical uncertainty**, with the low scenario accounting for a possible further escalation of the ongoing tensions in the Middle East.

Source:
EUROCONTROL 7-Year Forecast 2026-2032, Autumn 2026

EUROCONTROL Flight Forecast Update 2026-2032

Average annual growth for 2026-2032: +2.1% (±1.9 pp for the low-to-high range)



Key messages

- **ECAC flight growth is expected to average +2.1% annually over 2026–2032**, unchanged from the Spring forecast, despite the downward revision in the early years.
- **The long-term growth outlook remains broadly stable**, although the lower traffic base in 2026 results in fewer flights in absolute terms over the forecast horizon.
- **Southern and parts of eastern Europe continue to show stronger growth**, with upward revisions in Greece (+0.9 pp), Cyprus (+2.5 pp), Poland (+0.6 pp), Italy (+0.4 pp) and Spain (+0.3 pp).
- **Growth remains more moderate in northwestern Europe**, particularly Germany (+1.3%) and the UK (+1.5%), while Bulgaria and Romania see downward revisions to their long-term growth rates.

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Source:
EUROCONTROL 7-Year Forecast 2026-2032, Autumn 2026

EUROCONTROL 7-Year Forecast Update for Europe* 2026-2032 (Autumn 2026)

Summary of the IFR movements forecast

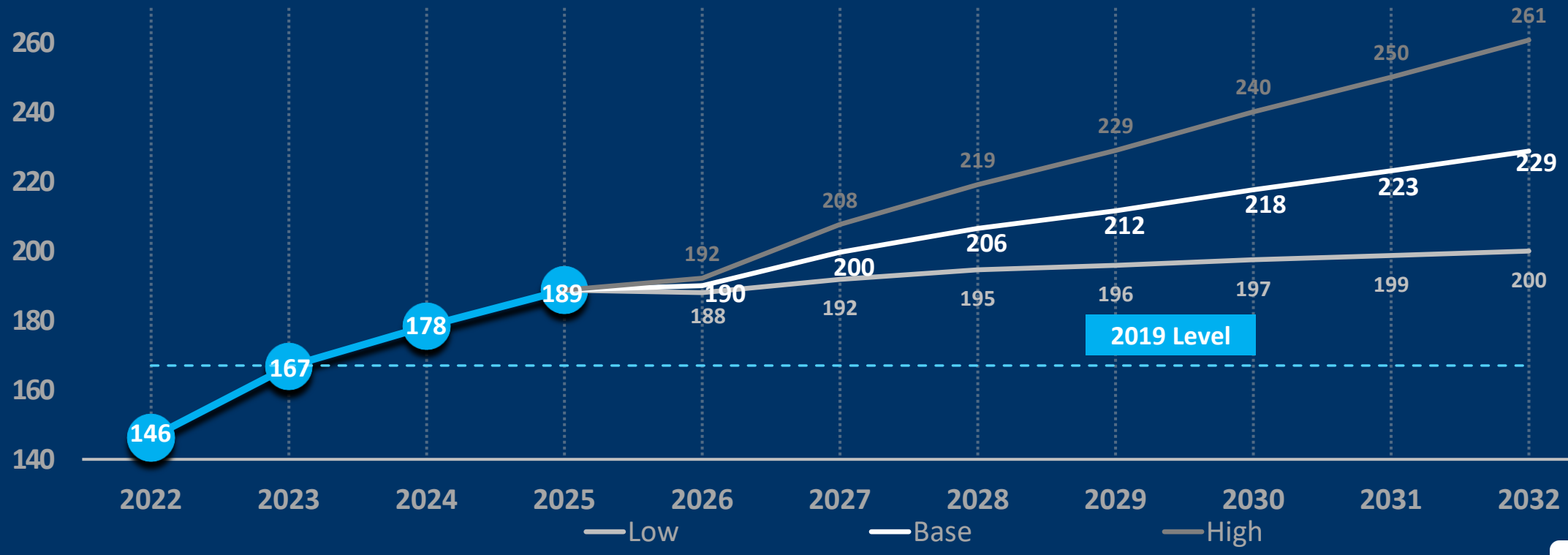
ECAC*		2019	2020**	2021	2022	2023	2024**	2025	2026	2027	2028**	2029	2030	2031	2032**	AAGR 2026-2032	AAGR RP4 2025-2029
IFR Flight Movements (Thousands)	**High**	.	.	.	.	.	.	.	11,305	11,876	12,495	12,990	13,541	14,012	14,522	**4.0%**	**4.1%**
	Base	11,085	4,979	6,231	9,238	10,144	10,634	11,046	11,234	11,594	11,891	12,102	12,366	12,589	12,817	**2.1%**	**2.6%**
	Low	.	.	.	.	.	.	.	11,164	11,287	11,308	11,294	11,301	11,298	11,298	**0.3%**	**1.2%**
Annual Growth (%) Compared to previous year.	**High**	.	.	.	.	.	.	.	2.3%	5.0%	5.2%	4.0%	4.2%	3.5%	3.6%	**4.0%**	**4.1%**
	Base	0.8%	-55.1%	25.1%	48.3%	9.8%	4.8%	3.9%	1.7%	3.2%	2.6%	1.8%	2.2%	1.8%	1.8%	**2.1%**	**2.6%**
	Low	.	.	.	.	.	.	.	1.1%	1.1%	0.2%	-0.1%	0.1%	0.0%	0.0%	**0.3%**	**1.2%**
Daily Growth (%) Compared to previous year. Removing leap year effect.	**High**	.	.	.	.	.	.	.	2.3%	5.0%	4.9%	4.2%	4.2%	3.5%	3.6%	**4.0%**	**4.1%**
	Base	0.8%	-55%	25%	48%	10%	4.5%	4.2%	1.7%	3.2%	2.3%	2.0%	2.2%	1.8%	1.8%	**2.1%**	**2.6%**
	Low	.	.	.	.	.	.	.	1.1%	1.1%	-0.1%	0.2%	0.1%	0.0%	0.0%	**0.3%**	**1.2%**
Fraction of 2019 (%) Compared to 2019 level.	**High**	.	.	.	.	.	.	.	102%	107%	113%	117%	122%	126%	131%	-	-
	Base	100%	45%	56%	83%	92%	96%	100%	101%	105%	107%	109%	112%	114%	116%	-	-
	Low	.	.	.	.	.	.	.	101%	102%	102%	102%	102%	102%	102%	-	-

* ECAC is the European Civil Aviation Conference.
** Leap year

Source:
EUROCONTROL 7-Year Forecast 2026-2032, Autumn 2026

EUROCONTROL 7-Year Forecast Update for the CRCO Region° 2026-2032 (Autumn 2026)

Actual and future Total en-route Service Units (TSU)

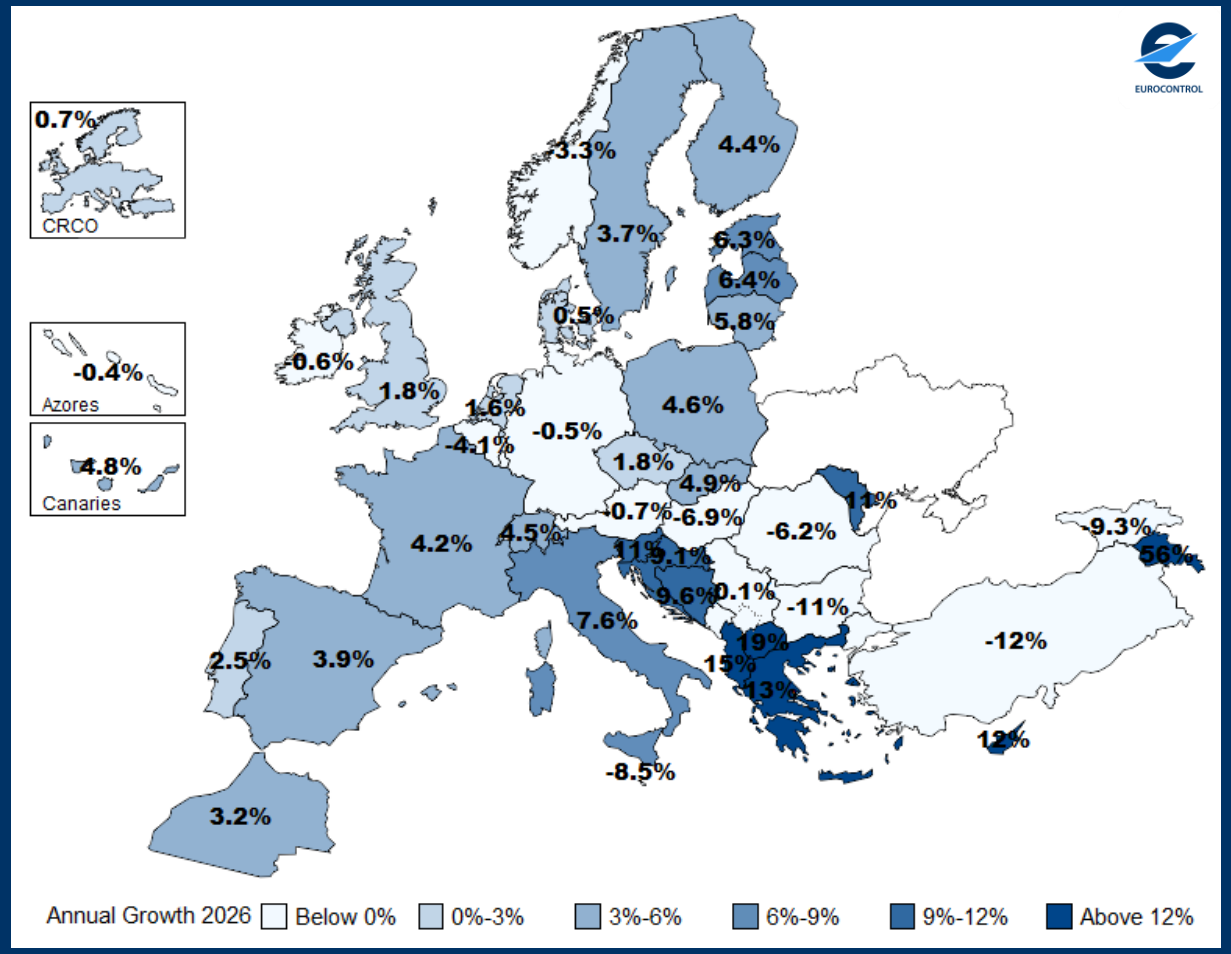


° The CRCO Region corresponds to the 39 Contracting States of the Multilateral Route Charges System (without Ukraine)

Source: *EUROCONTROL 7-Year Forecast 2026-2032, Autumn 2026*

EUROCONTROL TSU Forecast Update for 2026

The CRCO° region is expected to grow by +0.7% (±1.1 pp for the low-to-high range)



° 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.

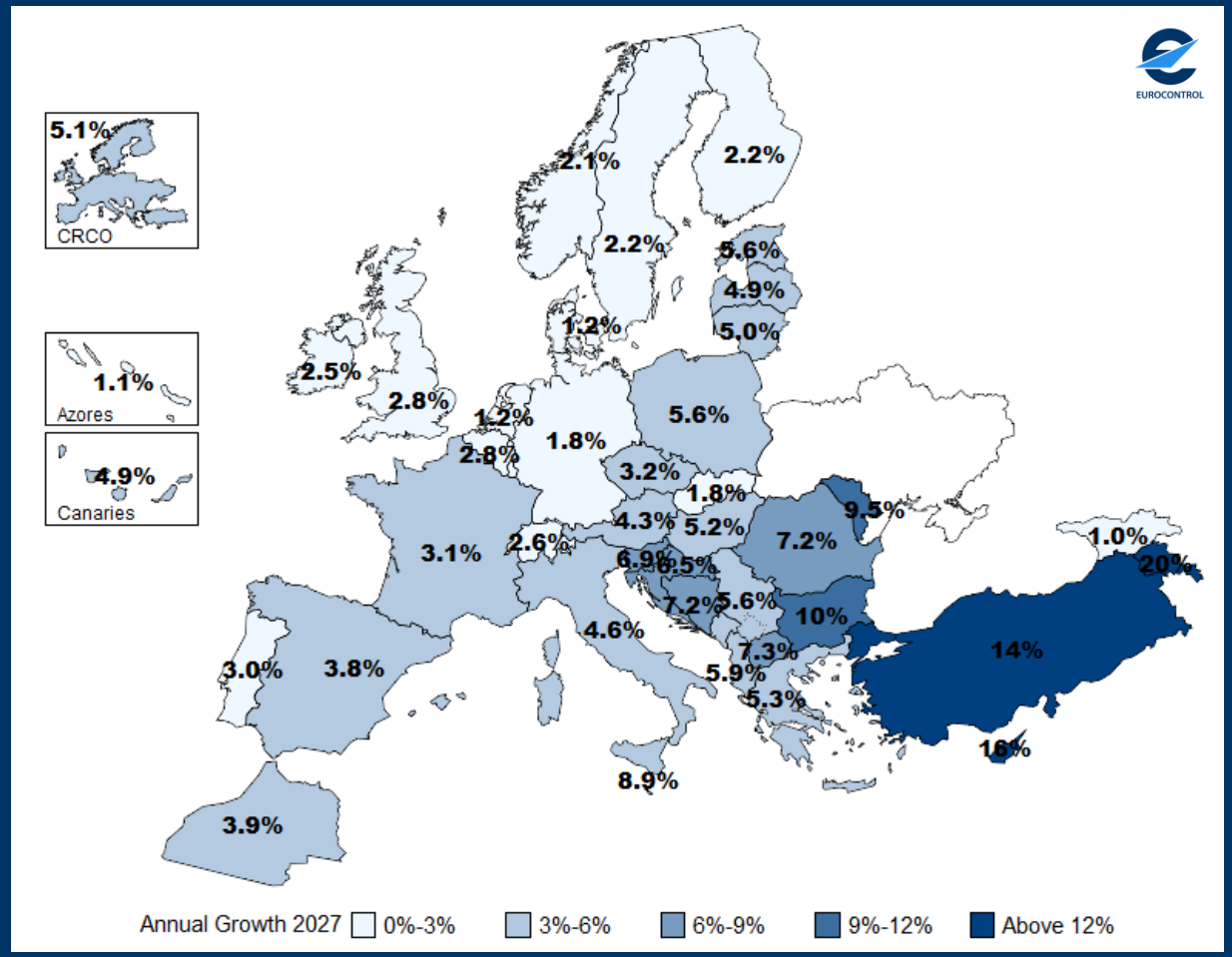
Key messages

- In line with the revision of flights for 2026, **the forecast for En-route Service Units is revised downwards (-2.5 pp)** compared to the Spring 2026 forecast, mainly due to the crisis in the Middle East.
- In 2026, TSU in the CRCO° region are expected to reach **190 million** in the Base forecast, compared with 194.8 million in the Spring 2026 forecast.
- **TSU are also expected to grow more slowly than flights in the region, increasing by 0.7% in the Base forecast.**
- The highest growth rates are expected in **Armenia, Albania** and **North Macedonia**, as well as in other States in the **Balkan** and **Baltic regions.**
- Despite a significant decline in service units between March and May 2026, **Cyprus is expected to record strong growth in 2026 (+12%).** This reflects additional Middle East-bound overflights rerouted from Türkiye, together with a stronger-than-expected recovery in traffic to Israel since June.

Source: *EUROCONTROL 7-Year Forecast 2026-2032, Autumn 2026*

EUROCONTROL TSU Forecast Update for 2027

The CRCO° region is forecast to grow by +5.1% (±3.1 pp)



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

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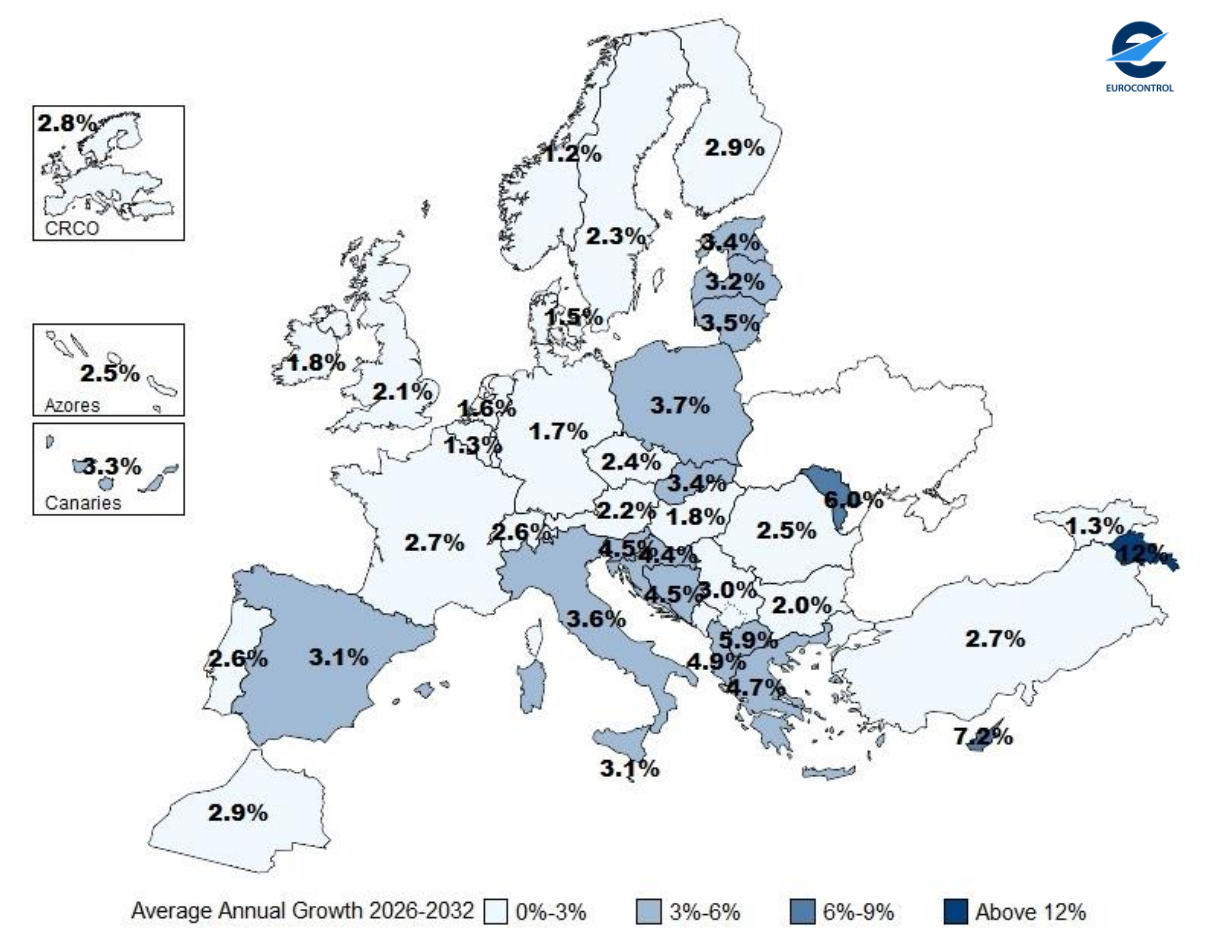
Key messages

- In 2027, **TSU are expected to grow by 5.1%** to **reach 200 million, 4.4 percentage points higher than the 2026 growth rate.**
- This revision is mainly driven by the **expected recovery of some traffic to and from the Middle East**, especially in the south-east States, with **Cyprus** and **Türkiye** leading the recovery, followed by States in the Balkans.
- **As with flights**, however, the expected amount of **TSU will remain below what was forecast for 2027 in Spring 2026.**
- The TSU forecast is highly sensitive to future overflight volumes and routing patterns. **Given the uncertainty surrounding their evolution, users are encouraged to consider the full Low-to-High range alongside the Base forecast.**

Source: *EUROCONTROL 7-Year Forecast 2026-2032, Autumn 2026*

EUROCONTROL TSU Forecast Update 2026-2032

Average annual growth for 2026-2032: +2.8% (±2.0 pp for the low-to-high range)



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

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Key messages

- By 2032, **eastern European States are expected, on average, to grow slightly faster than in western Europe.** Growth rates in northwestern Europe are generally expected to remain below 3%.
- States east of the Adriatic, together with Cyprus and Armenia, are expected to record somewhat stronger growth, above 4%, reflecting some persistence of the routing patterns observed in the second half of 2026.
- **Given the volatile conditions under which this forecast was prepared, users of this forecast are strongly advised to consider the forecast range (low to high) as a tool to manage business risks, as it captures part of the uncertainty associated with future routing patterns.**

Source: *EUROCONTROL 7-Year Forecast 2026-2032, Autumn 2026*

EUROCONTROL 7-Year Forecast Update for the CRCO° Region, 2026-2032 (Autumn 2026)

Summary of the En-route Service Units forecast

CRCO°		2019	2020*	2021	2022	2023	2024*	2025	2026	2027	2028*	2029	2030	2031	2032*	AAGR 2026-2032	AAGR RP4 2025-2029
En-route Service Units (Thousands)	High	.	.	.	.	.			192,149	207,635	219,127	228,933	240,077	250,033	260,716	**4.7%**	**5.1%**
	Base	167,000	70,828	89,680	146,221	166,751	178,358	188,740	190,024	199,640	206,468	211,546	217,600	223,075	228,743	**2.8%**	**3.5%**
	Low	.	.	.	.	.			187,992	191,828	194,564	195,846	197,453	198,672	199,967	**0.8%**	**1.9%**
Annual Growth (%) Compared to previous year	High	.	.	.	.	.	.		1.8%	8.1%	5.5%	4.5%	4.9%	4.1%	4.3%	**4.7%**	**5.1%**
	Base	2.8%	-58%	27%	63%	14%	7.0%	5.8%	0.7%	5.1%	3.4%	2.5%	2.9%	2.5%	2.5%	**2.8%**	**3.5%**
	Low	.	.	.	.	.	.		-0.4%	2.0%	1.4%	0.7%	0.8%	0.6%	0.7%	**0.8%**	**1.9%**
Daily Growth (%) Compared to previous year	High	.	.	.	.	.	.		1.8%	8.1%	5.2%	4.8%	4.9%	4.1%	4.0%	**4.7%**	**5.2%**
	Base	2.8%	-58%	27%	63%	14%	6.7%	6.1%	0.7%	5.1%	3.1%	2.7%	2.9%	2.5%	2.3%	**2.7%**	**3.5%**
	Low	.	.	.	.	.	.		-0.4%	2.0%	1.1%	0.9%	0.8%	0.6%	0.4%	**0.8%**	**1.9%**
Fraction of 2019 (%) Compared to 2019 level.	High		.	.	.	.	.		115%	124%	131%	137%	144%	150%	156%	.	.
	Base	100%	42%	54%	88%	100%	107%	113%	114%	120%	124%	127%	130%	134%	137%	.	.
	Low		.	.	.	.	.		113%	115%	117%	117%	118%	119%	120%	.	.

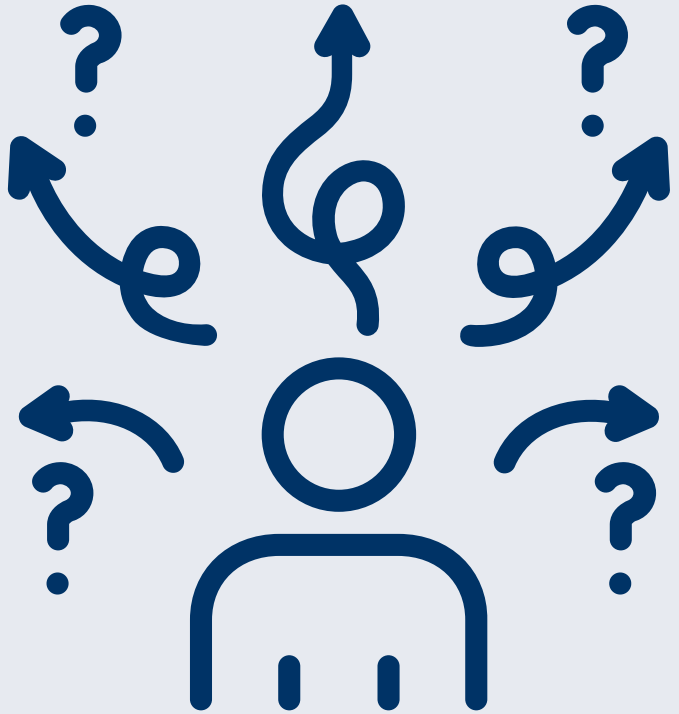
° The CRCO Region corresponds to the 39 Contracting States of the Multilateral Route Charges System (without Ukraine)
* leap year

Source:
EUROCONTROL 7-Year Forecast 2026-2032, Autumn 2026

Additional forecast risks

While the forecast scenarios reflect part of the uncertainty surrounding the key forecast drivers, additional or more severe developments could lead to outcomes beyond the forecast range.

- **Geopolitical developments and airspace changes:** The forecast incorporates current traffic patterns, reduced demand to/from the Middle East and associated rerouting effects. The base scenario assumes a gradual stabilisation over the course of 2027. However, the timing and extent of any potential further escalation, prolonged disruption or unexpected airspace closures/reopenings remain highly uncertain.
- **Macroeconomic and fuel price shocks:** Further inflationary pressures, weaker economic growth or renewed increases in oil and jet fuel prices could negatively affect airline costs and passenger demand beyond the assumptions already reflected in the forecast.
- **Military activity and airspace restrictions:** Increasing military airspace requirements and additional restrictions on civil aviation could affect available capacity, flight routings and network efficiency.
- **Airport, ATC and airline capacity constraints:** Staff shortages, industrial action, infrastructure limitations and operational disruptions could restrict traffic growth, particularly in already congested parts of the European network.
- **Aircraft availability and supply chain constraints:** Delays in aircraft deliveries, reduced engine availability and maintenance bottlenecks can limit airline capacity and fleet renewal.
- **Environmental and climate-related pressures:** Additional regulatory costs, changing travel behaviour and more frequent extreme weather events could affect aviation demand and operations.
- **Other unexpected disruptions:** Natural disasters, terrorist attacks, cybersecurity incidents and new geopolitical restrictions could further disrupt traffic flows and reduce growth.



Summary

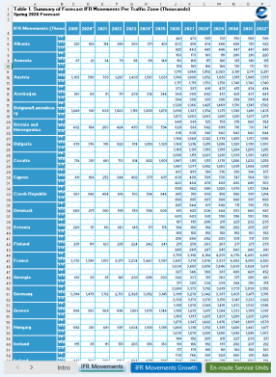
- **This Seven-Year Forecast (Autumn 2026)** replaces the Spring 2026 forecast and incorporates the latest observed traffic trends and route patterns up to September 2026, together with updated economic forecasts from Oxford Economics (August 2026), revised airport capacity assumptions and recent geopolitical developments.
- **European aviation remained resilient throughout summer 2026**, with record daily flight levels, historically high load factors and sustained demand, particularly for southern European destinations. Traffic to North Africa, North America and Asia/Pacific also remained strong, supported by relatively stable inflation (around 3%), limited increases in ticket prices so far, and improved availability in terms of aircraft numbers. **However, growth remained uneven across Europe**, with southern and eastern European markets outperforming major northwestern markets. **Despite this positive summer performance, overall traffic growth remained below earlier expectations, reflecting the impact of geopolitical disruptions.**
- **The ongoing tensions in the Middle East have been a major driver of this weaker-than-expected growth in 2026**, reducing demand to/from the region and disrupting established flight routings. The tensions have also contributed to a sharp increase in jet fuel prices, adding further pressure on airline operating costs. **ECAC* traffic is now expected to reach 11.2 million flights, representing +1.7% growth**, down from +2.7% in the Spring forecast. The crisis is likely to remove around 110,000 movements in 2026 compared with a 'no-tensions' scenario. **Significant short-term volatility remains**, with substantial changes to airline winter schedules adding uncertainty to the final 2026 traffic outcome.
- **The three forecast scenarios reflect different economic and geopolitical assumptions:**
  - **Base scenario:** A slightly weaker GDP outlook for 2026-2027, followed by more favourable economic prospects from 2028 onwards. A stabilisation of the Middle East situation is assumed by the end of Q1 2027, allowing traffic flows to recover progressively and oil prices to ease, supported by continued strong underlying demand.
  - **Low scenario:** A significantly weaker GDP outlook in 2026-2027, with no resolution of tensions in the Middle East before the end of Q1 2028. Prolonged disruption to energy markets, persistently high jet fuel prices and increasing pressure on airline costs and ticket prices constrain demand and delay the recovery.
  - **High scenario:** Stronger economic growth and sustained demand, supported by favourable operating conditions, sufficient airline and airport capacity, and a faster easing of geopolitical and energy-related pressures.
- **In 2027, ECAC traffic growth is expected to recover to +3.2% (±2.0 pp), reaching 11.6 million flights**, broadly in line with the Spring forecast. However, this growth starts from a lower 2026 traffic base, resulting in fewer flights in absolute terms than previously anticipated. The recovery is expected to be particularly pronounced in some of the markets most affected in 2026, notably Türkiye and parts of the eastern Mediterranean.
- **Over 2026–2032, ECAC flight growth is expected to average +2.1% annually (±1.9 pp)**, unchanged from the Spring forecast, reaching approximately **12.8 million flights by 2032**. Despite the downward revision in the early years, the medium-term growth outlook remains broadly stable, although absolute traffic levels are slightly lower than previously forecast. Southern Europe and parts of eastern Europe are expected to remain more dynamic than the major northwestern markets.
- **Significant uncertainty and volatility remain around the forecast**, particularly regarding geopolitical developments, airspace restrictions, energy prices and their impact on airline costs and traffic demand. Users are therefore strongly encouraged to consider the full forecast range (Low, Base and High scenarios), rather than relying solely on the Base scenario.

* ECAC is the European Civil Aviation Conference

Useful links

Explore detailed definitions and data supporting this forecast

The geographical definitions used in this forecast are available in:
[Annex – Traffic Region Definitions]



Detailed forecasts by State can be found in:
[Annex – Detailed Traffic Forecast]

For further information, please contact the EUROCONTROL forecasting team at statfor.info@eurocontrol.int

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, up-to-date daily data to support timely operational and business decisions.

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