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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:

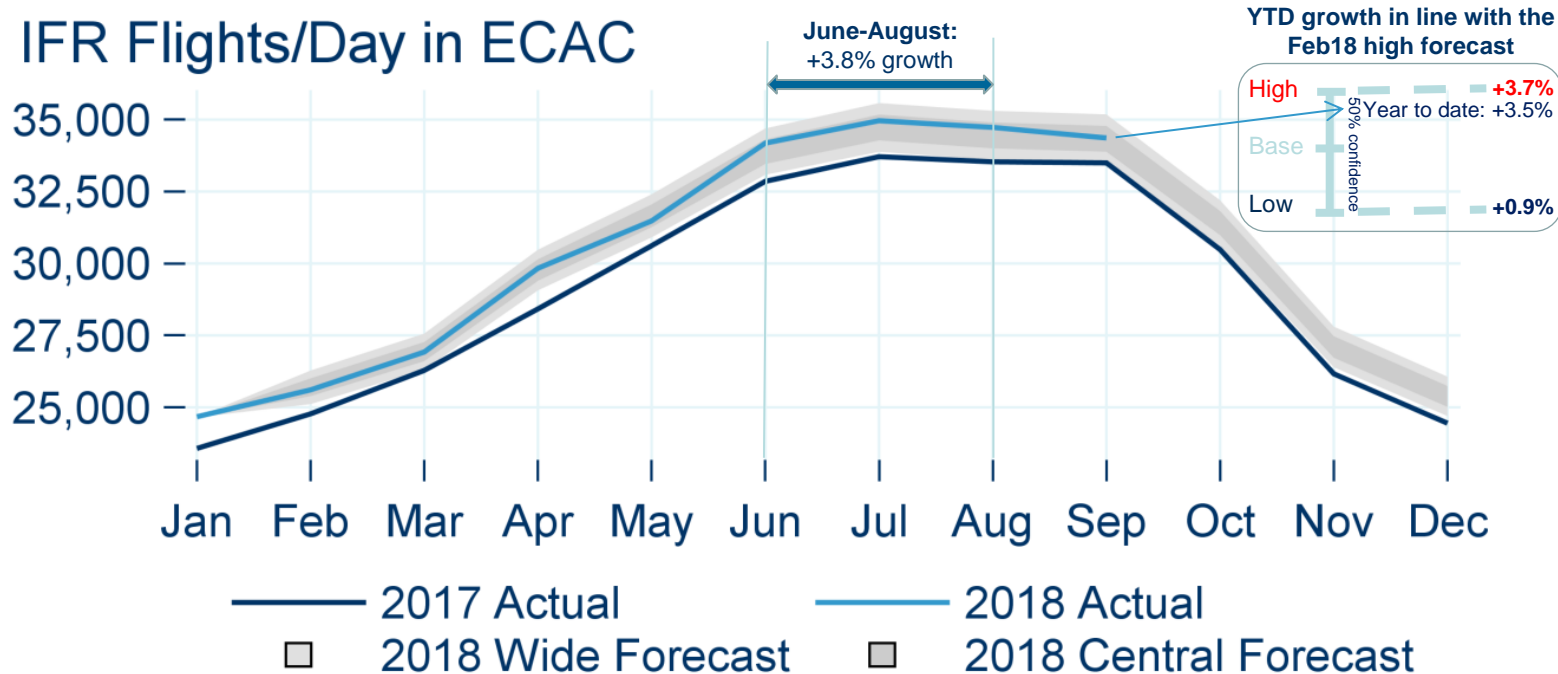
- The recent traffic trends
- The updated forecast inputs:
 - The latest economic forecast (August 2018 update)
 - Some forecast assumptions to account for foreseen traffic developments

The next update will be issued in February 2019.

RECENT TRAFFIC TRENDS

Traffic maintained last year's trend of high growth

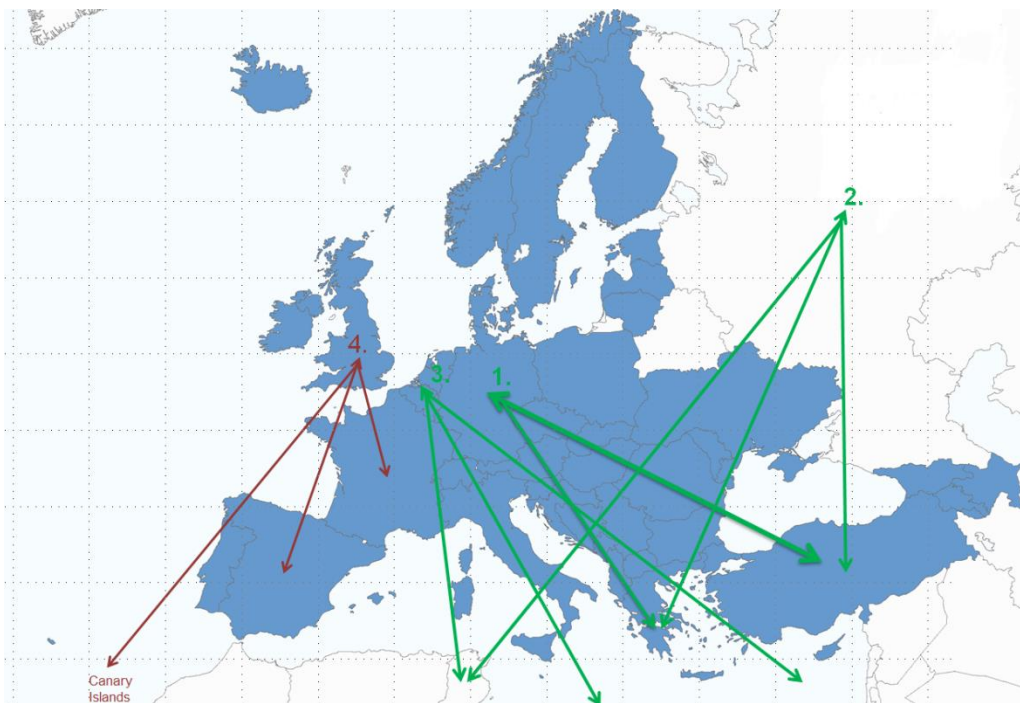
IFR Flights/Day in ECAC



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RECENT TRAFFIC TRENDS

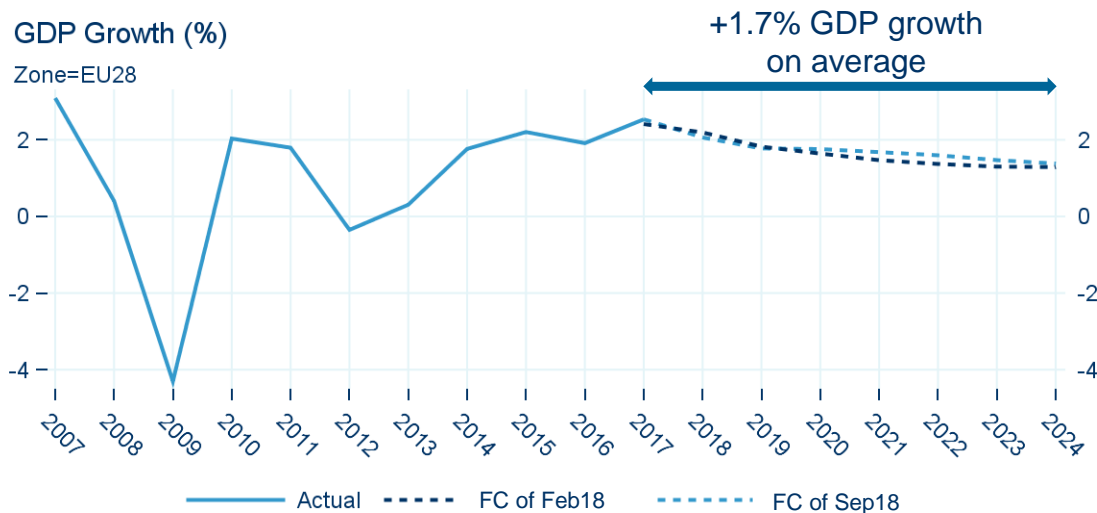
...flows to Turkey and Greece and the recovery of Russian traffic



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, Spain and France)

FORECAST INPUTS

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



Source: Oxford Economics
(August 2018 update)

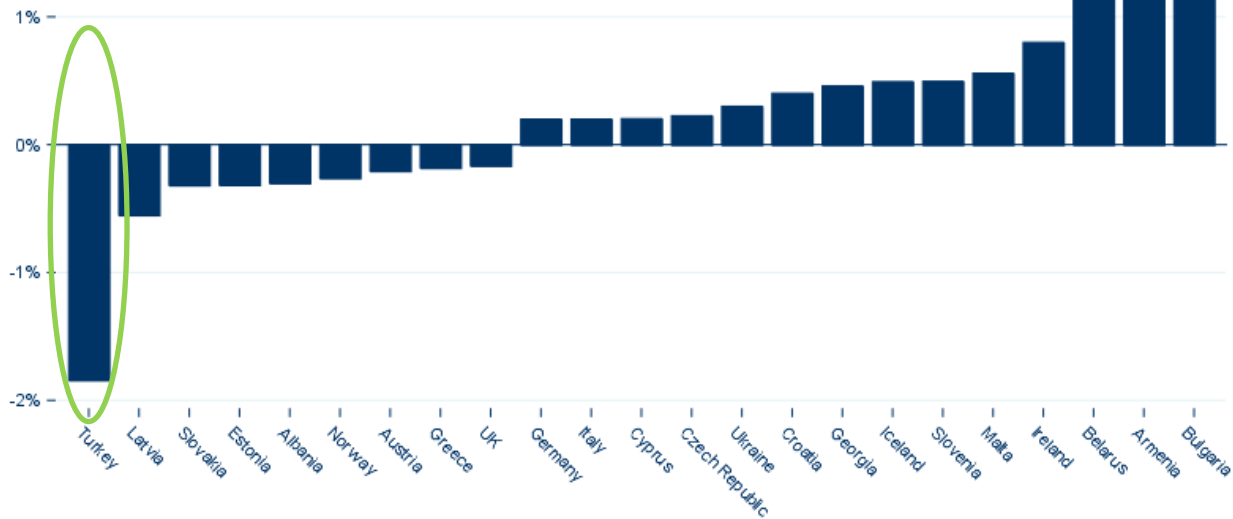
↓ 2018 revised downwards
-0.1pp

↑ 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)

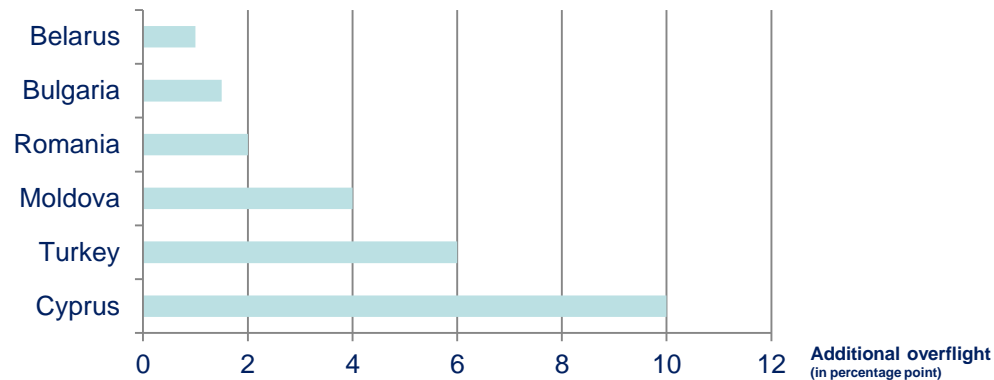
Change in GDP growth for 2019
(Only changes greater than 0.1pp are shown)



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)

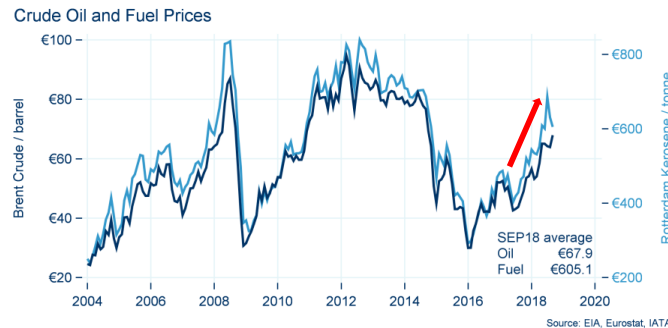
What remains the same...

- 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

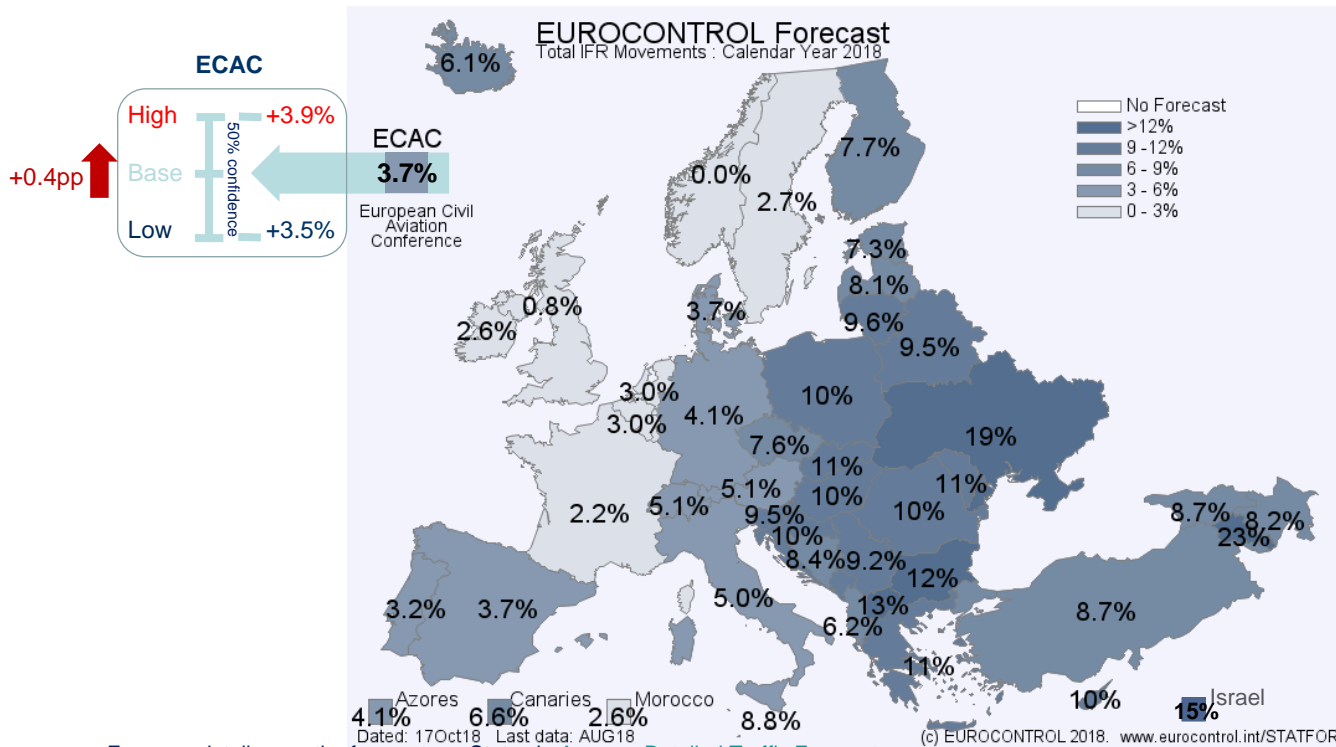
- Oil price:** Current surge in oil prices could lead to an increase of fuel costs, hence an increase of the ticket prices which is a downside risk.



- 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

2018 flight forecast per State (Base scenario)

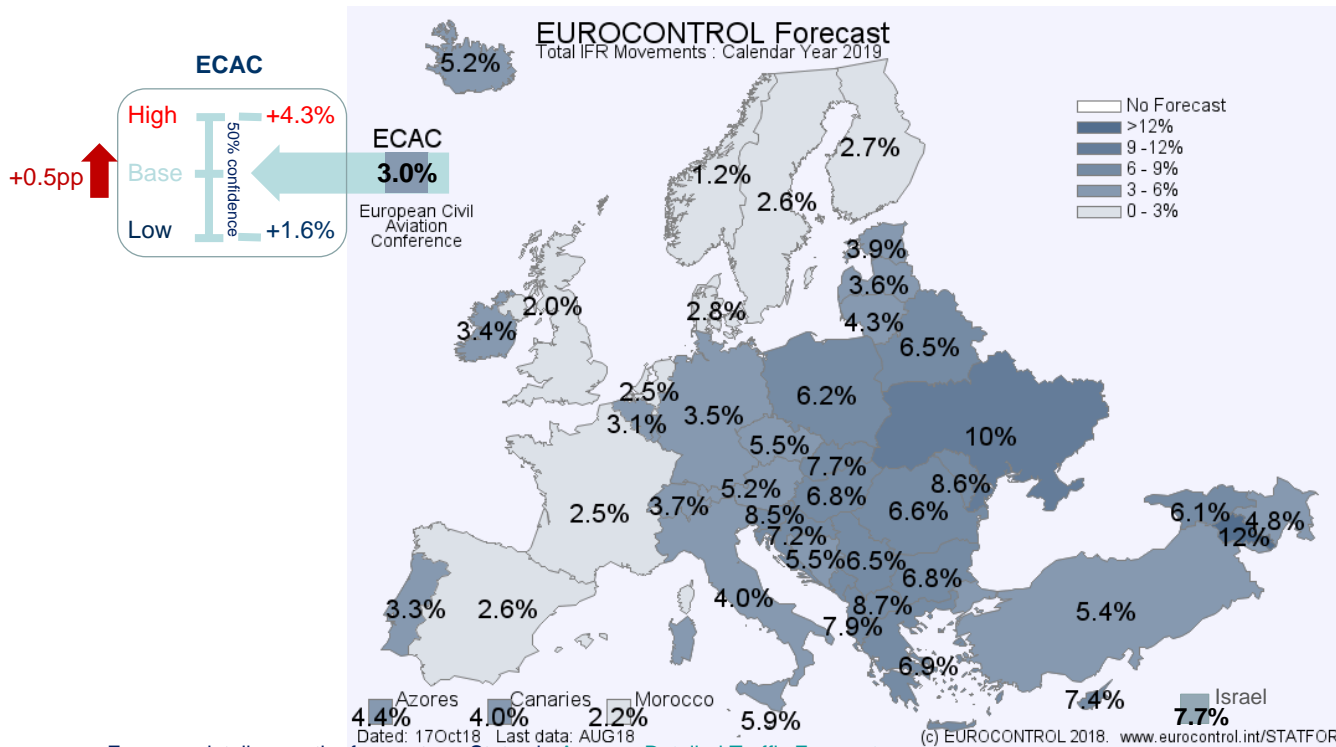


- Upward revision of +0.4pp compared to the February 2018 base forecast
- Most revisions (upwards) in Eastern Europe
- Downwards revision for UK (-1pp)
- Narrow uncertainty

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

FLIGHT FORECAST

2019 flight forecast per State (Base scenario)

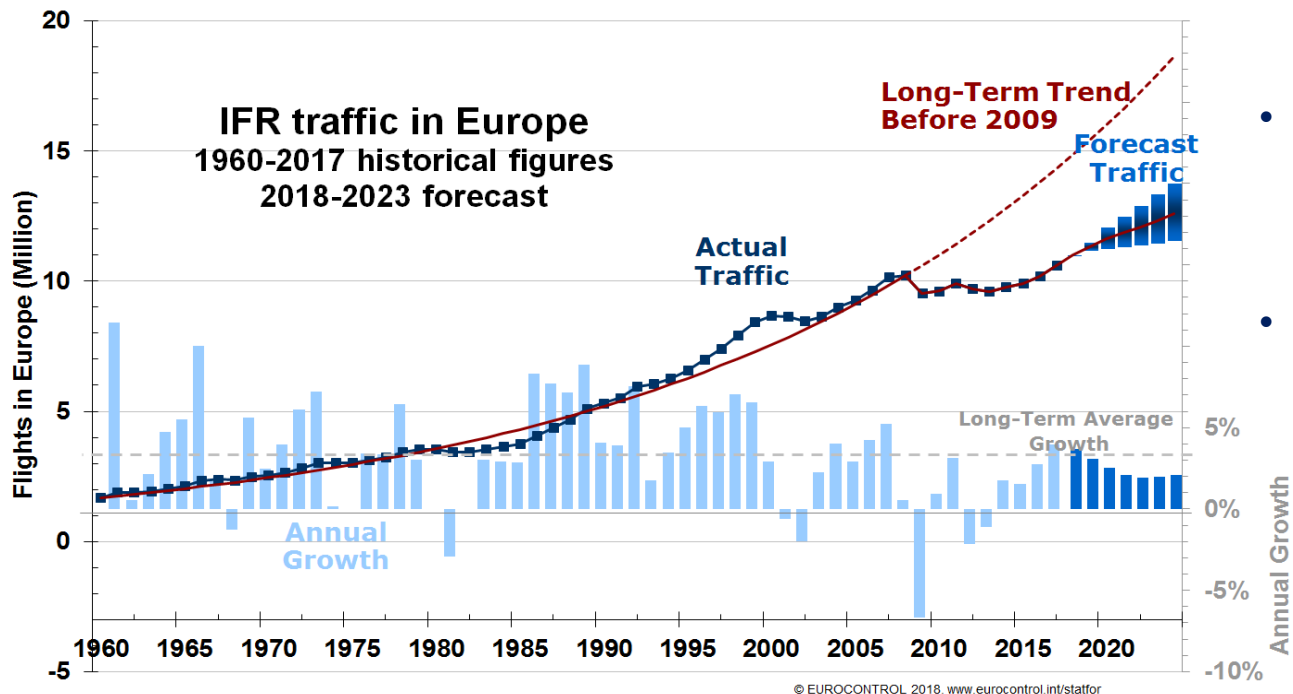


- Upward revision of +0.5pp compared to the February 2018 base forecast
- Uncertainty for 2019 is wider than the +/-1pp of the February forecast

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

FLIGHT FORECAST

Average annual growth per State between 2017 and 2024

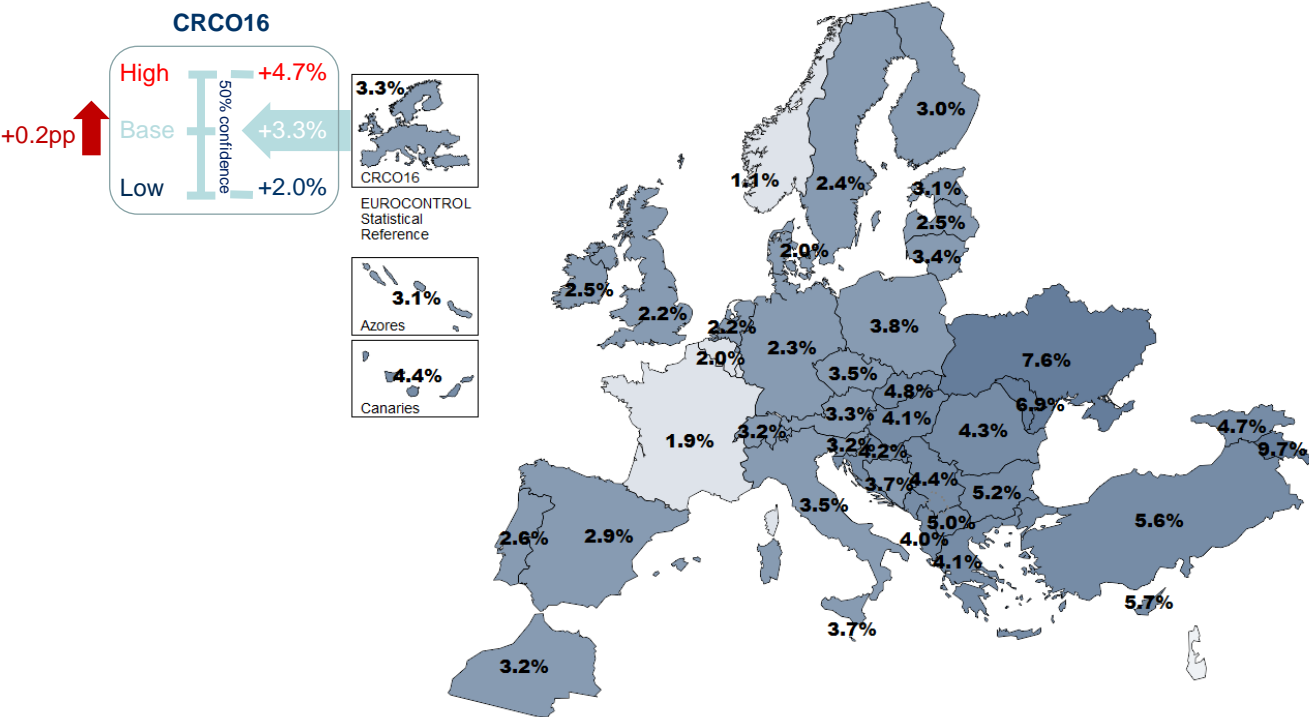


- Over 2018-2024, 2.5% Average Annual Growth for ECAC
- A revision upwards +0.2pp in line with the strong recent flight growth and the strong economic outlook for EU28

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](#)

- **Version 2, 06 December 2018, slide 4 modified**

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