



**Network Manager**  
nominated by  
the European Commission



# Challenges of Growth 2013-2035

Le transport aérien français en 2015 :  
turbulences et conflits dans un ciel toujours agité

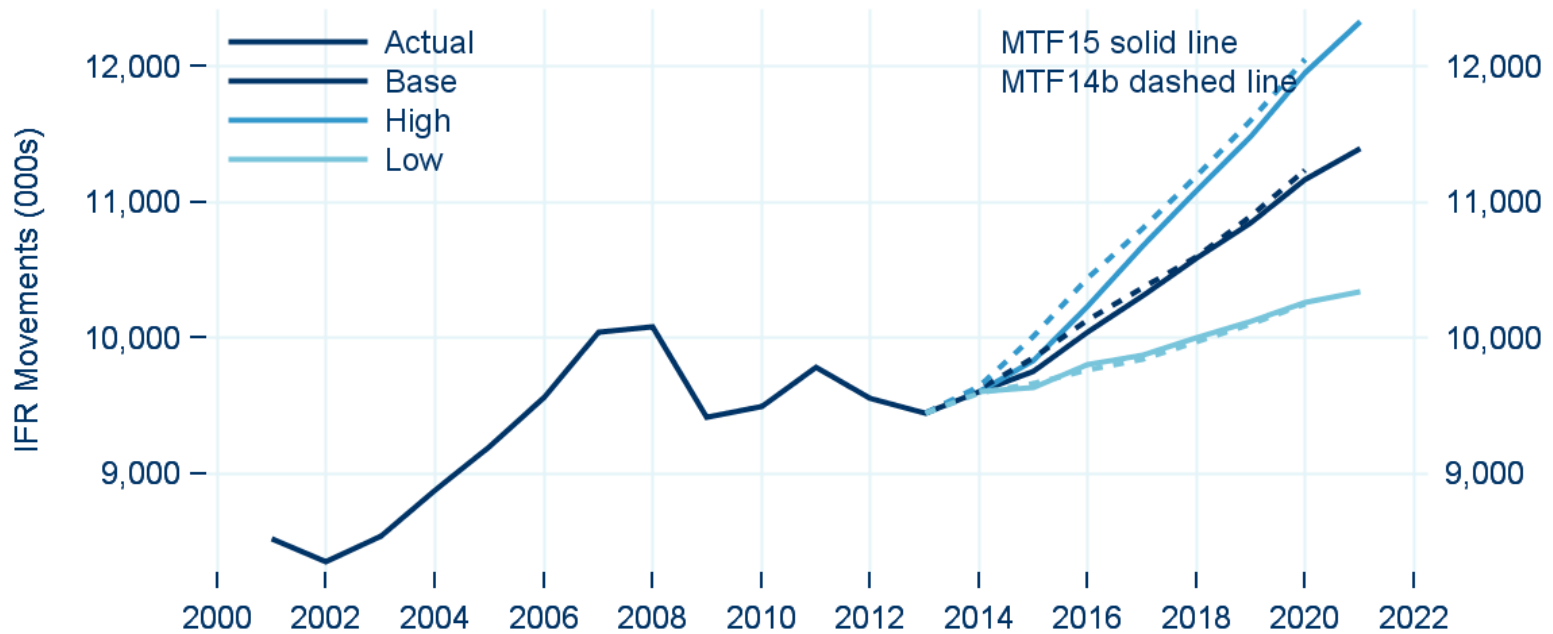
Philippe MERLO

Director Air Traffic Management - EUROCONTROL

COLLOQUE VILLE & AEROPORT : Paris, 15 juin 2015

**For total Europe, current forecast is slightly lower than previous forecast (dated September 2014), with narrower short-term uncertainty.**

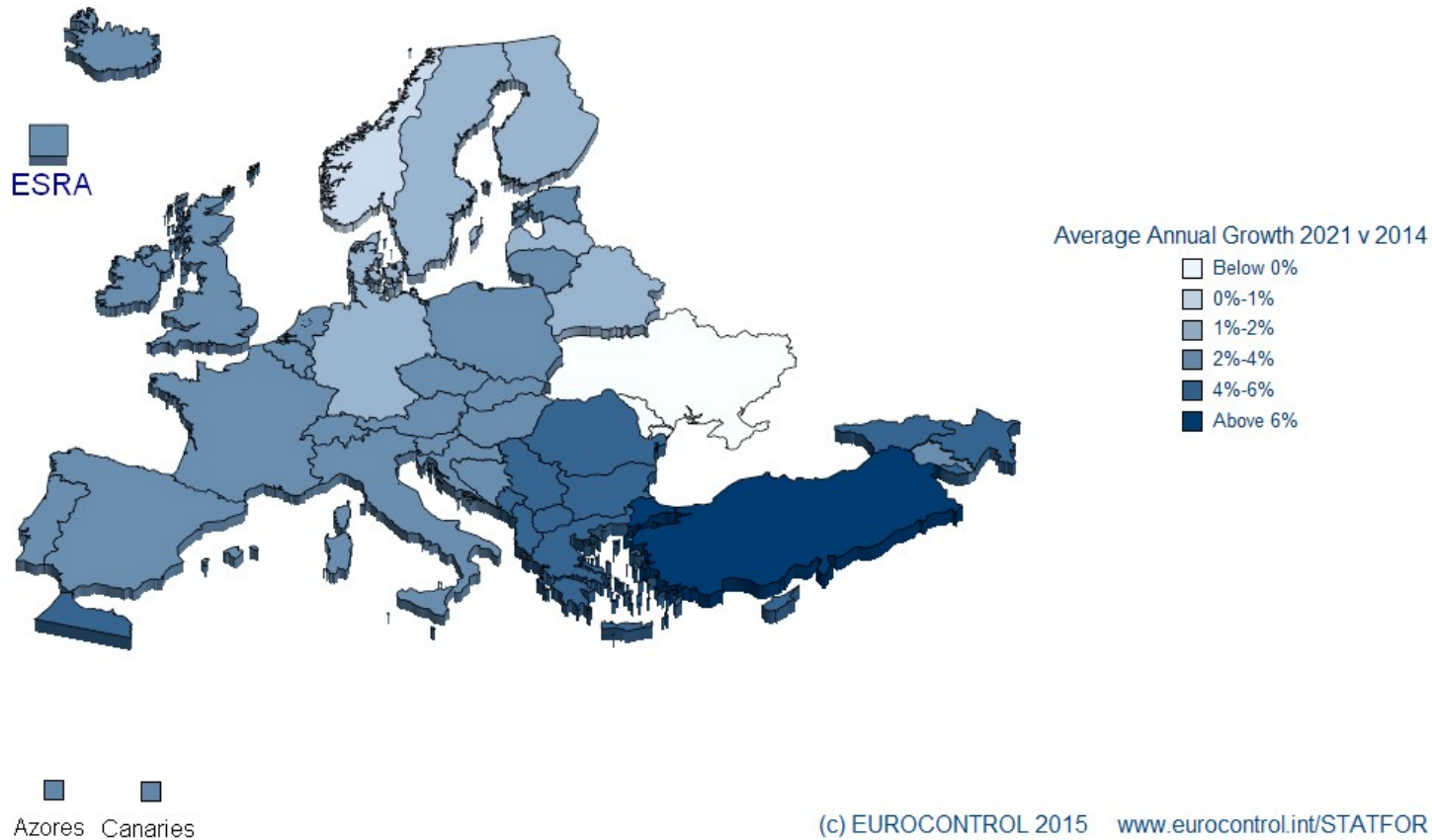
### ESRA08 - Grand Total



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# Average Annual Growth per State, 2021 v 2014

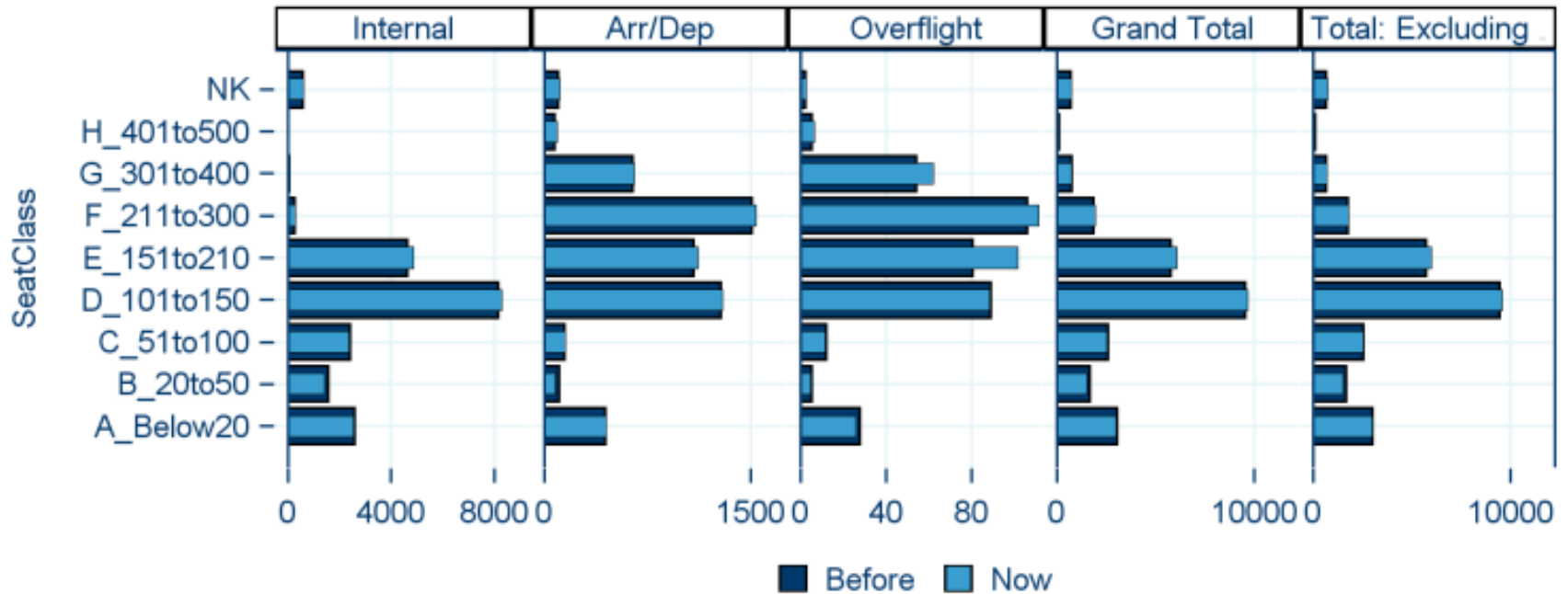
## Growth mainly in Eastern Europe



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# Average aircraft weight increased in 2014, mostly through increases in flights in the 150-200 seat band.

ESRA08 : daily flights per seat class & flow



JAN14-JAN15 v 12 months before

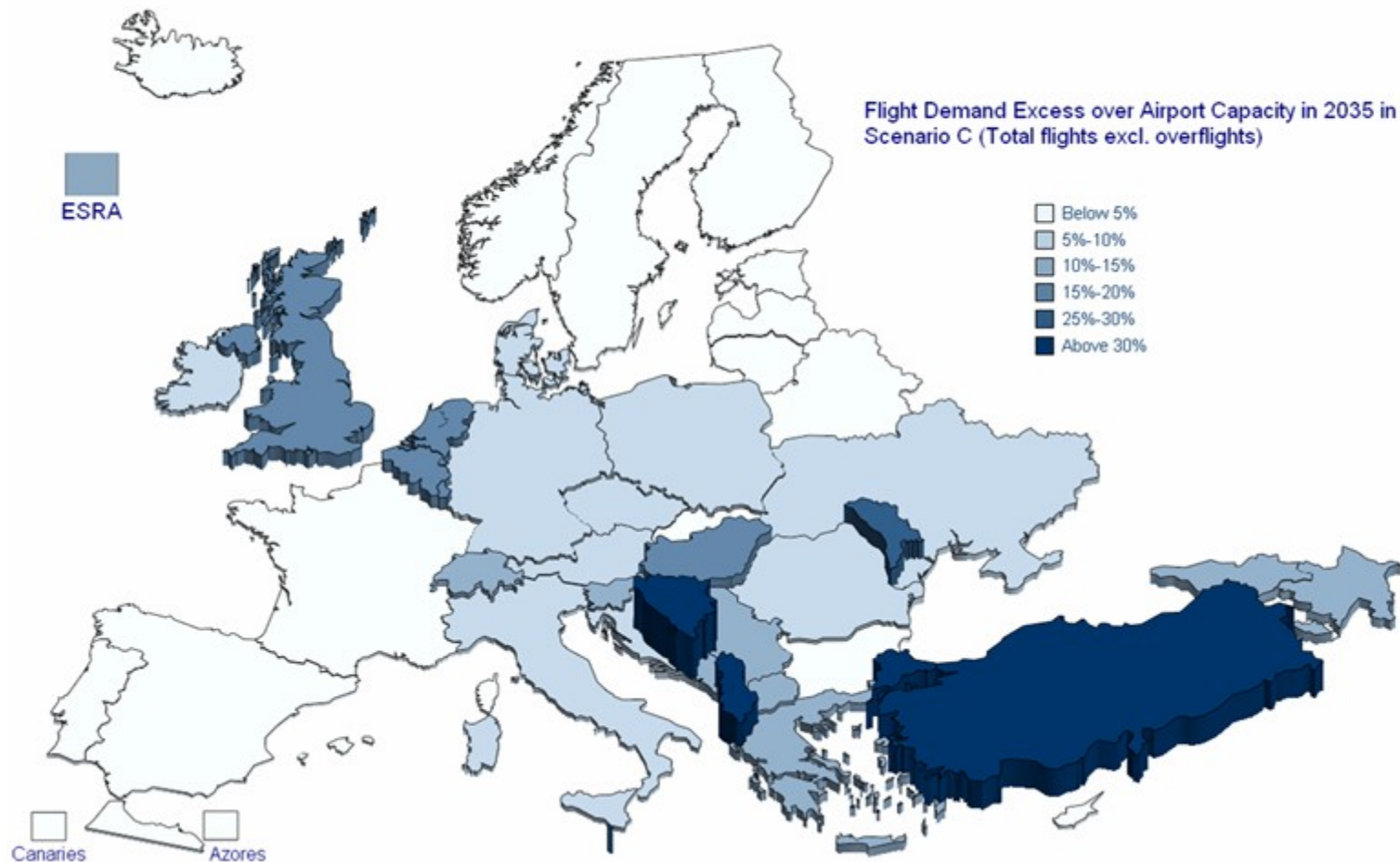
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# Challenges of growth study – Airport capacity is the biggest challenge

In the most-likely scenario, for Europe:

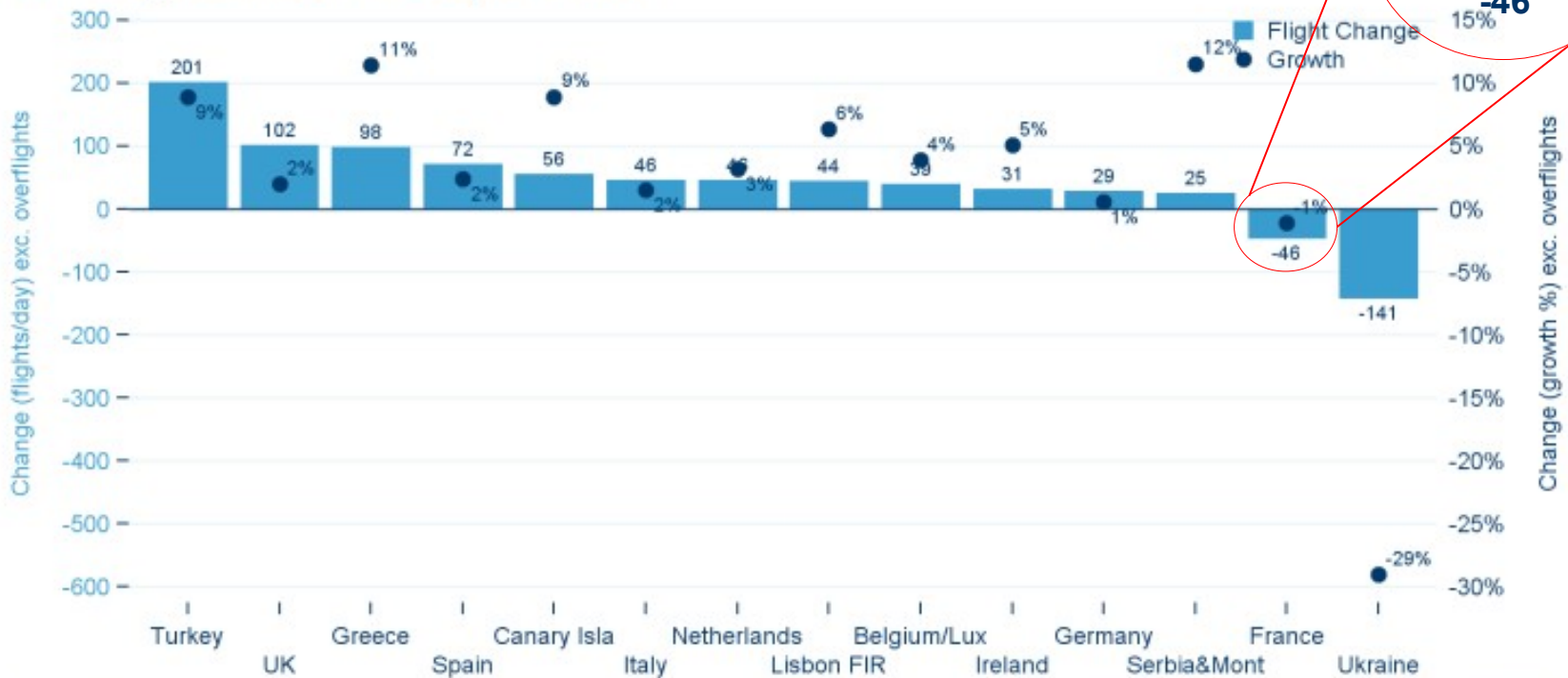
- Forecast traffic will see **slower growth** than historical rates: there will be **50% more flights** in **2035** than in **2012**,
- Level of **unaccommodated demand** will reach nearly **2 million** (12% of demand) by **2035**, mainly due to airport capacity.

# Unaccommodated demand (%) due to lack of airport capacity : Most-likely Scenario



# France's contribution to European growth in 2014 was negative (excl. overflights).

Main changes to traffic on the European network

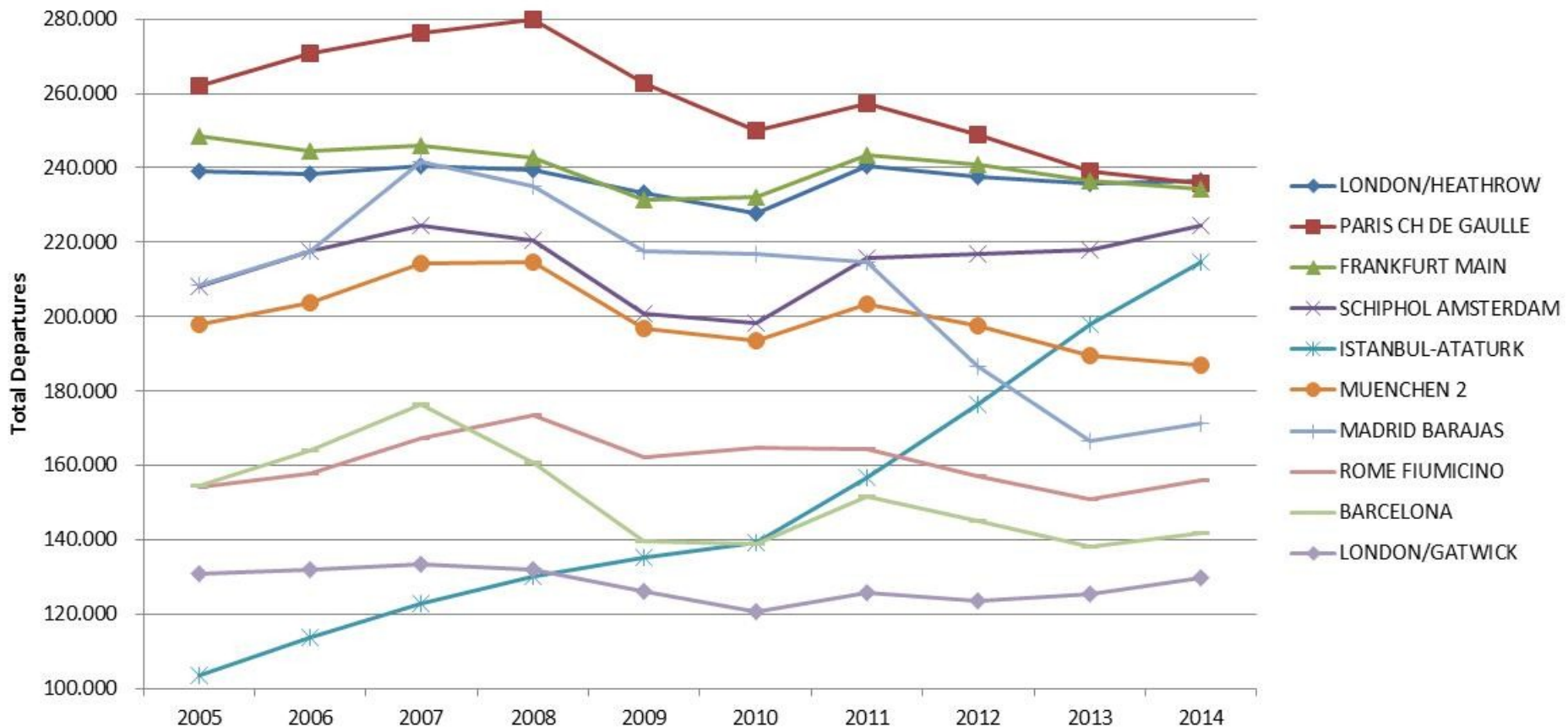


Period: JAN14 inclusive to JAN15 exclusive compared to JAN13 to JAN14. Only changes > 25 are shown.

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# Airport traffic evolution

## Evolution of traffic at top 10 airports in Europe





# European solutions : new Sesar projects

- Re-categorisation of wake vortex separation minima
- Performance Based Navigation – PBN
- Time Based Separation
- GBAS / CAT III
- time to arrival

10% max potential for capacity increase

# Conclusion

- Airports essential to the network ... and vice versa!
- Airport capacity is the next big challenge
- Efficient solutions exists
- All relevant actors need to be involved