



The Chartered
Institute of Logistics
and Transport

Airports National Policy Statement

POLICY PAPER
AVIATION POLICY GROUP

Introduction

The Chartered Institute of Logistics and Transport (CILT) is a professional institution embracing all transport modes whose members are engaged in the provision of transport services for both passengers and freight, the management of logistics and the supply chain, transport planning, government and administration.

Our principal concern is that transport policies and procedures should be effective and efficient, based on objective analysis of the issues and practical experience, and that good practice should be widely disseminated and adopted. The Institute has a number of specialist forums, a nationwide structure of locally based groups and a Public Policies Committee which considers the broad canvass of transport policy. This submission draws on contributions principally by the Aviation Policy Group and has been informed by members in regional groups around the UK.

This report begins by setting out some background and the objective of the report. It then considers current policies and strategies and goes on to note a number of issues which arise when considering airport expansion policies. The report then considers airports in the UK in nation or region groups, ending with a short summary.



CILT's Aviation Policy Group has published or contributed to a number of reports or submissions over the last few years, as follows:

2020 Night Flights response to DfT consultation

2020 Building Aviation Back Better response to DfT consultation

2020 Economic Regulation of Heathrow responses to CAA consultations (x2)

2020 UK Regional Air Connectivity Review submission and update

2020 Union Connectivity Review response to call for evidence

2020 Routes to Net Zero Year End Summary Report

2021 Aviation Tax Report response to Treasury consultation

2021 Manston re-determination submission to DfT

2022 Aviation consumer policy reform response to DfT consultation

2022 CAA effectiveness and efficiency response to DfT consultation

2022 Air Freight report

2022 Airport Expansion report

2023 SAF Mandate response to DfT consultation

2023 Net zero airports response to DfT consultation

2023 UAVs and UAM report

2023 Luton Expansion written submission

2024 Pre-Election Manifesto Request

2024 Gatwick Northern Runway written submission

2024 Airport Surface Access report

Background and objective

The Airports National Policy Statement (ANPS) was designated by the Secretary of State for Transport on 26 June 2018, having been approved in the House of Commons by a vote of 415 in favour and 119 against. The ANPS was the culmination of a process which included the Airports Commission led by Sir Howard Davies between 2012 and 2015, scrutiny of drafts by Parliament and legal challenges. After designation there were further legal challenges including to the Supreme Court which were all dismissed. The main feature of the ANPS is to indicate that the Government's preferred option for additional runway capacity in the South East of England is for a new north west runway at Heathrow.

Also published in June 2018 was a document titled 'Beyond the horizon – The future of UK aviation: Making best use of existing runways' (usually abbreviated to MBU). This policy document covers all other airports.

In addition to the ANPS and MBU documents, there are other aviation policy documents of which parts are still in force and there are many transport policies and other general policies which are relevant to airport expansion. However, in this report, we focus on the ANPS and MBU.

The ANPS and MBU are now six years old and, indeed, based on work done from 2012 onwards. In particular, the years 2020 to 2022 were significantly affected by the Covid pandemic when aviation activity reduced dramatically. By 2023 on most measures UK aviation recovered to about 90% of 2019 levels and 2024 is expected to be close to 100% of 2019 levels. Over the last 10 years new information has become available on many issues, in particular on climate change.

Since 2018, several airport expansion projects have been subject to planning applications or development consent orders and decisions have been made, leading to a number of precedents in terms of the interpretation of the ANPS and MBU. Some of these decisions have also been subject to legal challenge, again providing clarity on some aspects. Some applications and legal challenges are ongoing.

The objective of this paper is to suggest a new policy document that should replace the ANPS and MBU documents. Clearly such a document should be the subject of analysis, consultation and scrutiny but the purpose of this paper is to highlight many of the issues that can be addressed.

It is suggested that a single document, effectively combining the remit of the ANPS and the MBU, should cover the whole of the UK and should seek to identify a strategy for the next 10 to 15 years, perhaps also noting some longer-term options. This timescale will, in particular, align with Carbon Budgets and also look forward to net zero in 2050. We have selected a date of 2035 as the spot year for the forecasts as this is in the middle of Carbon Budget 6 and is also a key date for some of the measures associated with the route to net zero by 2050.

To be clear, it is not the role of Government policy to prescribe the size and nature of developments at individual airports. The aviation industry, including airports, is predominantly in the private sector and, where there is public ownership, it is usually by an organisation at arms length from the public owner. It is the role of Government to set overall policy and to ensure it is aligned with other Government policies. Individual airport expansion schemes are subject to the processes in the various planning acts and, in particular, subject to Development Consent under the Planning Act of 2008 and to planning approval under the Town and Country Planning Act 1990. In both these acts, local issues play a key part in the planning balance used to make decisions. Under the Planning Act of 2008, airport expansions involving a new runway, an increase of more than 10 million passengers per annum or an increase of more than 10,000 all cargo Air Transport Movements are defined as Nationally Significant Infrastructure Projects (NSIPs) in England and Wales and are subject to the process including a Development Consent Order (DCO). Other airport expansions are dealt with as 'normal' planning applications, initially to the local planning authority, with rights of appeal and call-in.

Current policies and strategies

The two key policies which this paper suggests need to be updated are:

- Airports National Policy Statement: new runway capacity and infrastructure at airports in the south-east of England, DfT, June 2018.
- Beyond the horizon: The future of UK aviation – Making best use of existing runways, DfT, June 2018.

In addition, there are other aviation policies part of all of which remain current:

- Aviation Policy Framework, DfT, March 2013, Cm 8584.
- Flightpath to the Future, DfT, May 2022.
- Jet Zero Strategy: Delivering net zero aviation by 2050, DfT, July 2022
- Jet Zero Strategy: One Year On, DfT, July 2023.
- Future of Flight Action Plan, March 2024

There are a number of national policies of particular relevance, as follows:

- Net Zero Strategy: Build Back Greener, H M Government, October 2021.
- Overarching National Policy Statement for Energy (EN-1), DESNZ, November 2023.
- Levelling-up and Regeneration Act 2023.
- National Planning Policy Framework, DLUHC, December 2023.
- Devolution of Powers to Scotland, Wales and Northern Ireland.

There are also other transport policies and strategies of relevance, as follows:

- National Networks National Policy Statement, DfT, March 2024.
- Various rail policies and strategies relating to HS2, TransPennine Route Upgrades, Western Rail Access to Heathrow, Heathrow Southern Railway, rail electrification and freight interchanges.
- Various road policies and strategies relating to small scale road improvements, missing links, by-passes, junction capacity upgrades and smart motorways.
- Various bus policies and strategies including local control and funding
- Union Connectivity Review 2021
- Future of Freight: a long-term plan, DfT, June 2022.
- National Policy Statement for Ports, DfT, January 2012.
- Airspace change, DfT and CAA.
- Aviation Regulation, DfT, CAA and CMA.
- Consumer protection, CMA
- Accessibility, DfT.
- Aviation taxation, H M Treasury.
- International agreements, bi- and multi-lateral agreements.

Issues

Determining policy requires a balance of a range of issues and, for this report, we suggest the following, in no particular order, are significant:

- Forecasts and scenarios
- Climate change
- Air freight
- Surface access
- Noise
- Other environmental impacts
- Economic and social benefits
- Ownership
- Smaller airports
- UAVs and UAM

Each of these are considered in the following paragraphs.

Forecasts and scenarios

It is many years since ‘predict and provide’ has been applied to airport expansion in the UK. The 2003 White Paper ‘The Future of Air Transport’ predicted demand of around 500 million passengers in 2030 and the proposals, which included two new runways, would provide capacity of up to 470 mppa. Forecasting future demand for air transport is very challenging and the DfT and others who undertake forecasting exercises always accept that there are margins for uncertainty. Comparisons of previous forecasts with actuals show a mixed picture, with some forecasts in excess of actual and others the reverse.

The DfT’s forecasting methodology includes the creation of a national forecast, useful for helping to understand national issues such as carbon emissions, and then allocating this national total to individual airports. Complimentary to this ‘top down’ approach, individual airports often forecast their own growth by a ‘bottom up’ approach, based on their local market prospects. The most recent complete DfT forecasts were published in 2017, but significant updates were published in 2022 as part of the Jet Zero policy and most recently as part of the dataset for the SAF mandate. The most recent DfT assumptions about airport capacity were published in 2022 as part of the Jet Zero dataset.

In this paper we suggest a combination of bottom up and top down approaches in a relatively simple methodology which provides a level of possible growth at individual airports which when added gives a UK total which can then be sense checked against national policies, in particular the Carbon Budgets.

While most attention is paid to forecasting air passengers, air cargo forecasting has been studied much less. However, our suggested approach can also be used for air cargo forecasting, given the predominance of cargo activity at a small number of airports.

In this paper we present three scenarios which result in the following rates of growth and shares:

Scenario	Pax growth 2023-2035	SE&E pax share 2035	Cargo growth 2023-2035
1	20%	61.5%	36%
2	30%	59.7%	64%
3	40%	58.1%	64%

In the 12 years 2011-2023, passenger growth was 24% and this included the pandemic years, so Scenario 1, which is an annual average growth rate of about 1.5% pa., would imply a similar or actually more severe event in the next 12 years. Scenario 2 is an annual average growth rate of about 2.2% pa and Scenario 3 is about 3% pa. Growth in the five years 2014-2019 was an average of about 4.5% pa. Scenario 1 may happen if fuel or carbon costs increase significantly and dampen demand, particularly for low cost airlines. In Scenario 1 the share of UK passengers at SE&E airports is about the same as 2023, but it decreases for Scenarios 2 and 3. In Scenario 3, higher growth means that more marginal services, in particular at smaller and non SE airports, become viable. Cargo growth rates are dependent on the assumptions made for the few major cargo airports.

As is always the case with forecasting, any impression of accuracy indicated by a single number or a decimal place is misplaced. There is undoubtedly some variability which can be expressed as a sensitivity or as an advance or delay on the year a particular level is achieved. Such variability is inherent in the numbers in this paper, which should therefore not be taken as precise.

Climate change

This issue is extensively covered in the advice given by the Climate Change Committee and in the Government's Jet Zero strategy, with numerous contributions from the industry (eg. Sustainable Aviation), international organisations, academics and others.

Our proposed spot year date of 2035 is in the middle of the five year Carbon Budget 6 period of 2033 to 2037. It is also the point at which CORSIA obligations will change and a suggested timescale for the introduction of new types of aircraft into airline fleets as shown on Sustainable Aviation's Net Zero Carbon Road-Map.

Our proposal is that GHG emissions related to airport growth should be aligned with the Carbon Budgets. This is not different from the current Government policy, but we see a more direct linkage by noting the possible level of GHG emissions in the future associated with a particular level of activity and ensuring that this aligns with the Carbon Budget. In particular, we note that Carbon Budget 6 for 2033 to 2037 is 193 MtCO₂e per year. Aviation's GHG

emissions in 2019 were just under 40 MtCO₂e per annum, which represented about 7% of the total. 7% of 193 MtCO₂e is about 14 MtCO₂e, so this should be the maximum total aviation GHG emissions in that period. Because of the particular nature of the air cargo sector and the operation of all-cargo aircraft (see below) we break this down further and assume that 13.5 MtCO₂e is allocated to passengers and 0.5 MtCO₂e to cargo, this ratio being related approximately to the ratio of passenger to all-cargo aircraft movements. We recognise that this estimate is crude but the idea is to propose a principle, for which these figures are illustrative, which can later be developed more precisely.

It is our view that, to ensure alignment with the Carbon Budgets, larger expansions, ie. those that are defined as NSIPs, should be conditioned upon not exceeding the GHG emissions figures noted. Non-NSIP expansions should note the GHG emissions as part of the national total to ensure that that figure remains aligned to the aviation element of the Carbon Budget total of 14 MtCO₂e.



Air cargo



We raise this issue at an early stage to highlight the fact that previous aviation policies and strategies have been less than full in their coverage of air cargo. In part this is because it is smaller in activity terms than passengers but it is nevertheless very large. CILT's report on Air Freight, published in 2022, is a comprehensive review of the air cargo sector and describes many of the features, processes and economics of the sector. In particular it is important to understand how the sector carries freight either in all-cargo aircraft or the belly holds of passenger aircraft and the types of airlines which operate in these sectors.

In terms of airports policy, one of the key issues of previous strategies has been the lack of air cargo forecasts. As noted above, forecasting passengers has its challenges, but these are multiplied for air freight. Data on activity is more limited and the forecasting methodologies are less developed than for passengers. Air cargo activity is of course associated with world trade, but recent years have shown that international conflicts, geopolitical events and of course the pandemic have resulted in major swings of air cargo activity. However, in this paper, our proposals for

complementary bottom up and top down forecasts are particularly suited to air cargo forecasting. In the UK, only the largest airports carry any substantial amounts of belly hold cargo and even here this is dominated by Heathrow, which handles close to 60% of all UK air cargo. All-cargo flights are currently focused on East Midlands and Stansted Airports, which respectively handle 14% and 9% of all UK air cargo. The remaining 20% is spread around the other airports although even here unevenly, with many airports handling very small amounts.

One of the challenges of air cargo forecasting is the practice of trucking air cargo between airports. Cargo may be accepted at or delivered to an airport by truck, having been flown from another airport, either in the UK or in continental Europe. Such trucking often includes documentation which includes an air waybill and so is documented as a through journey. Some estimates have been made, including one that notes that trucking to and from Heathrow may equate to 800,000 tonnes a year, around half as much again as is recorded by the CAA. Gatwick has also indicated that its cargo throughput may be underestimated as cargo is trucked to other airports.

Surface access

Surface access issues concern how passengers, staff, cargo and other trips are made at airports. CAA surveys have provided data over many years of the percentage of departing passengers using particular modes, and the proportion using public transport is a key indicator. Other measures are also used, such as for staff mode share and detailed forecasts by each mode are usually a key element of any expansion proposals. CILT's recent report on Airport Surface Access uses the CAA's extensive database to review the situation at UK airports.

Many policies from the documents noted above apply to airport surface access, but two in particular are worth noting:

- The Aviation Policy Framework of 2013 includes at paragraph 5.12:

The general position for existing airports is that developers should pay the costs of upgrading or enhancing road, rail or other transport networks or services where there is a need to cope with additional passengers travelling to and from expanded or growing airports. Where the scheme has a wider range of beneficiaries, the Government will consider, along with other relevant stakeholders, the need for additional public funding on a case-by-case basis.

In practice, there is often a wider range of beneficiaries, so the cost of upgrades is spread between a number of contributors. Recent examples include the new Inverness Airport Station, which was funded by the Scottish Government and the upgrade of Gatwick Airport Station, where funding was shared by The UK Government, Gatwick Airport Limited and the Coast to Capital Local Enterprise Partnership.

- The National Planning Policy Framework includes at paragraph 115:

Development should only be prevented or refused on highways grounds if there would be an unacceptable impact on highway safety, or the residual cumulative impacts on the road network would be severe.

In practice, these tests, which apply to all developments, not just airports, are a relatively low bar to overcome such that expansion proposals are acceptable provided that their impacts are not 'unacceptable' or 'severe'.

The Aviation Policy Framework of 2013 also describes the roles of Airport Transport Forums (ATFs) and Airport Surface Access Strategies (ASASs), which have been established for some time. These measures provide a way for partnerships to be formed between the airport operator and other transport stakeholders and lead to practical plans which are implemented through the partnerships. A new ANPS/MBU policy document should reiterate the value of ATFs and ASASs and confirm that they are required irrespective of expansion plans.

Under this heading we also consider the issue of air/rail competition. Some European countries have restricted flights where rail competes but this is usually limited where the flight serves significant connecting traffic to a hub airport. In the UK:

- Many routes are over water or the rail route is significantly longer in distance than the air route.
- Air routes are a significant element in Union Connectivity.
- The Jet Zero target is for domestic flights to be net zero by 2040.

In our view therefore policy should enable competition so that passengers have a choice. Given that HS2 will reduce journey times on some routes, it is likely that this will lead to a change in the air/rail share on some key routes (eg. London-Manchester) in any event.

Noise

Aircraft noise is often the most predominant local environmental issue for airports. There are international and national regulations and most airports have some local regulations.

The International Civil Aviation Organisation (ICAO), a branch of the United Nations, has long standing noise regulations set out in annexes to the Chicago Convention of 1944 and subsequent agreements. Essentially these regulations set the maximum amount of noise that an individual aircraft can make for it to be certificated.

UK national policy on noise comes from the Environmental Noise Regulations of 2006 which apply to all sources of noise although aviation is exempt from noise nuisance under the Environmental Protection Act of 1990. The 2013 Aviation Policy Framework states that the Government's overall objective on noise is to: *'...limit and where possible reduce the number of people in the UK significantly affected by aircraft noise.'* The regulations require the measurement of noise from airports (and also from other forms of transport and other activity) and the publication of Noise Action Plans. Noise is covered in most of the aviation policy documents noted above.

This report does not attempt to be comprehensive in terms of noise related to airport expansion, but it does suggest that there are several issues which are disproportionately significant, as follows:

- Aircraft noise is a highly technical issue which requires a deep understanding of acoustics but is also a highly personal issue in terms of perception and the effect on individuals. It is common at inquiries or even in the day-to-day contacts between the aviation industry and local communities for there to be a total disconnect between the technical evidence and the perceptions and experiences of individuals. This is a real challenge for decision-making related to noise.
- Over the last 50 years, as new aircraft have replaced older types, the noise made by individual aircraft has decreased significantly. Also, despite a large increase in the numbers of flights, average noise levels (which combine noise from individual aircraft movements with the numbers) have also decreased.

- 'New' noise, where there is previously little or none, is perceived to be much worse than the equivalent change in noise where it already exists. Changes to flight paths may create such 'new' noise.
- Respite, or periods when there is little or no noise, are perceived as particularly valuable by many communities. The primary version of this is at night, and many airports have night restrictions or even night bans. Heathrow also has a respite regime under which alternate runways are used for take-off and landing, giving people under the 'other' runway's approach respite for part of the day.

There are many different measures of aircraft noise and airports often publish data with a range of measures, including those using the decibel scale and others based on the number of events above a particular level, for different time periods (eg. day and night) and for single events and averages. For each measure there is a range of levels which relate to annoyance or the level at which a change can be heard. In this report, we use the 55 dB Lden measure which seeks to measure average noise levels with different weights for the day, evening and night (hence 'den'). This measure and level is not necessarily the 'best' but is available for all airports that have prepared a Noise Action Plan and is therefore comparable between airports. In this report we have noted the populations within the 55 dB Lden noise contour.

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Other environmental impacts

This report does not attempt to cover all the impacts that happen at airports, but it simply notes that some or all of the following may be relevant at particular airports:

- Local air quality
- Water quality
- Impact on agriculture
- Heritage
- Ecology and biodiversity
- Visual effects
- Others, particular to individual airports

Economic benefits

At its simplest, the aviation industry is about jobs. The sector is estimated to support 960,000 jobs and contributes £52 billion to overall GDP or 3.4% of the whole UK economy. Of this, 433,000 jobs are with airports and ground services, and 200,000 are in airlines. Every time expansion is considered there are arguments about the precision of these figures, who benefits and whether they can be substituted by other sectors. However, it is clear that these benefits are substantial, both nationally and locally and are a key element in the balance, as recalled in the Bruntland definition of sustainability, which notes environmental, social and economic benefits.

At an individual level, employment is a fundamental part of life. The aviation sector provides opportunities at all levels, from the simplest to the most complex of tasks, suitable for all sections of society, and all around the UK. Career opportunities and prospects for people entering work are vital for the future of the country. While there are some concerns about the balance between London and the rest of the UK (as there are in many sectors), the aviation sector has the ability to spread the benefits around the country, from the services provided at regional airports to the supply chain for manufacturing and services.



Ownership and economics

Airports in the UK have a diverse range of owners in both the private and public sectors. The 1985 Airports Policy White Paper required airports which were in the public sector to be sold or placed in organisations at an arms length from their public sector owners. The British Airports Authority which then owned seven major airports became BAA plc and was privatised in 1987. Other airports were either sold or moved to arms length organisations, and some were offered as concessions or management contracts. The main private sector owners are now sovereign wealth funds, major pension funds, international fund managers and infrastructure owners. Public owners are generally the local authorities in which the airport is located, often in partnership with a private sector owner or operator. Airports are attractive investments where the investor is looking in the long term, such as pension funds.

While some airports are clearly attractive as investments, smaller airports may struggle to be financially viable, given the high proportion of fixed costs required to maintain an airport's safety and regulatory requirements. There are some indications that airports handling less than 5 million passengers a year will be challenged to be profitable on their own. However, even airports handling significantly less

than this can remain in operation if they provide facilities or use their land for activities which may be partly or wholly aviation-related, such as maintenance, repair and overhaul. Some airports also perform a valuable role in supporting the economy of the region or area and therefore may justify public sector support, a good example of which is the Highlands and Islands airports in Scotland. Some airports operated as commercial entities have closed, the most recent example being Doncaster Sheffield. Others have been acquired by the public sector for local economic reasons, including Prestwick and Cardiff.

Diverse ownership brings benefits in terms of competition and choice but it also means that it is not possible to direct airports (other than for safety, security or environmental reasons). Investment is therefore a matter for the owner to decide. Despite the competitive market, some airports are considered to be monopolies and subject to economic regulation. At present, this applies in particular to Heathrow, with Gatwick, Stansted and Manchester being subject to more light touch regimes. Government policy and other regimes such as planning or environmental regulations can restrict development but cannot require it to take place.



Unmanned aerial vehicles and urban air mobility



A recent trend in part driven by technology improvements is noted under the dual headings of Unmanned Aerial Vehicles (UAVs) and Urban Air Mobility (UAM). CILT has published a report on these issues and there are different views about their prospects. In many respects, they are separate from the air transport issues discussed in this report. However, there are two aspects which need to be noted. First, there are concerns about the interaction between air transport and UAVs to ensure safety. This is an issue which is capable of resolution by technology. UAM may also interact with air transport if it becomes a means of transport as part of a longer journey. The major airports may become connection points to enable UAM to complete a short journey as part of a longer journey. In practice this is much like a helicopter journey, with the vital difference that UAM is much less noisy than a helicopter. However, like a helicopter, the capacity available at the busiest airports may be limited and therefore unable to accommodate UAM. At this stage of development it is not known if there will be any capacity for UAM and this report does not seek to accommodate it.

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Airports by region

In the following paragraphs, airports handling more than 100,000 passengers in 2023 are discussed by region in alphabetical order. At the start of each section is a box with the key points relating to that airport. At the end of each regional section is an overview of that region. The projected numbers of passengers and cargo tonnage for 2035 are not intended to be forecasts, targets or allowances. They are merely a possible level of activity based on reasonable assumptions about each airport and possible

growth rates for their particular markets and they are given as a range relating to the three scenarios described above. It will be up to the owner of each airport to decide what level of activity they wish to operate at and, if any further approvals are required, this will have to be by the normal planning processes of planning permission or Development Consent plus any other approvals required based on the balance of economic, social, environmental and surface access factors.

Midlands

Birmingham

- 11.5 million passengers in 2023
- Possible growth to 14-20 million passengers by 2035
- 77.4% O&Ds in the West Midlands, but HS2 Interchange Station may attract some London O&Ds
- Airport City and NEC developments could increase market

Birmingham Airport served 12.7 million passengers in 2019 and recovered to 11.5 million in 2023. The Airport is owned by seven metropolitan boroughs, the Ontario Teachers' Pension Plan and employees.

Surface access is generally good with a network of strategic and local roads, plus Birmingham International rail station on the West Coast Main Line. The public transport share of air passenger journeys is relatively low at around 20% partly due to the good road network and also related to a high proportion of outbound passengers. The Airport's plans include

measures to make sustainable modes more attractive for both passengers and staff and there are also plans for improved bus and light rail links.

The Airport's Noise Action Plan notes that 45,500 people live within the 55 Lden contour and the Airport will need to demonstrate that growth will not make the situation worse.

Growth to between 14 and 20 million passengers by 2035 would be possible with relatively modest expansions of the terminal and related facilities, some of which may require planning permission. This level of growth would be well within the capacity of the runway and would thus be in line with a policy of making best use of existing runway capacity. A second runway, which was envisaged in some earlier plans, has effectively now been dropped. Growth to 14-20 million passengers by 2035 would be faster than the average for non London airports which in turn is faster than the average for London airports, but this would reflect the airport's increased attractiveness with the HS2 Interchange Station, due to be opened between 2029 and 2032 and connected to the Airport by a people mover.

East Midlands

- 3.9 million passengers and 352,000 tonnes of cargo in 2023
- Possible growth to 5-6 million passengers and 5-600,000 tonnes of cargo by 2035
- 67.9% O&Ds in the East Midlands, 15.8% from Yorks and Humber

East Midlands Airport served 4.7 million passengers in 2019 and recovered to 3.9 million in 2023. The Airport is owned by the Manchester Airports Group which in turn is owned by ten metropolitan boroughs and IFM Investors.

Road access is generally good with a network of strategic and local roads but there is no direct rail access and East Midlands Parkway Station is some distance away with a limited on-demand link. With limited public transport the share of air passenger journeys is around 8%. Freight is trucked to and from the Airport but the timing of truck movements, which is related to aircraft arrivals and departures, does not coincide with peak times on local roads and the Airport is well connected to the M1 at the centre of the motorway system.

14,650 people live within the 2019 55 Lden noise contour and the airport has no numerical limits on the numbers of aircraft movements at any time of day, although there are maximum permitted noise levels for individual aircraft and lower charges for less noisy aircraft. Night operations are mainly by all-cargo aircraft but the first and last rotations of passenger flights occur in the hours beginning 0600 and 2300.

Growth to between 5 and 6 million passengers by 2035 would be relatively straightforward as the airport already served 4.7 million in 2019. Cargo growth to 5-600,000 tonnes is very significant but, given the airport's central location and focus on this sector, coupled with a shortage of runway capacity elsewhere, particularly at night, this is a realistic estimate of the airport's prospects. The Airport's last published master plan from 2015 suggested that this would be possible. The existing runway has sufficient capacity. Undoubtedly some developments will require planning permission, and it is possible that a comprehensive plan could be categorised as an NSIP if it results in an increase of more than 10,000 all-cargo ATMs (in 2023 there were 23,085 all-cargo ATMs). There are major logistics facilities being developed adjacent to the Airport as part of the East Midlands Freeport, including an air-rail cargo interchange, which will contribute to the Airport's ability to handle more air cargo.



Overview of Midlands

Two major airports serve a large catchment. Both serve a range of routes including some long haul. East Midlands specialises in cargo and is ideally located for this role. Birmingham has good surface access and the HS2 station will improve connectivity while passenger and cargo access to East Midlands relies on the roads. Growth at both airports would be aligned with regional and local plans. Both airports have noise issues but should be able to grow whilst also reducing contours. Both should also be able to achieve GHG emissions in line with Carbon Budget 6, totaling around 0.84 MtCO₂e by 2035. Passenger growth at the two Midlands airports (between 23% and 69%) would be significantly higher than for the South East and East regions.

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North of England

Leeds Bradford

- 4 million passengers in 2023
- Possible growth to 5-7 million passengers by 2035
- 92% O&Ds in Yorks and Humber

Leeds Bradford Airport served 4.0 million passengers in 2019 and recovered to almost the same level in 2023. The Airport is owned by AMP Capital but the local councils own a 'special share' to protect its name and ensure its continued operation as an air transport gateway.

Although only 11 km from Leeds city centre and 14km from Bradford, road access is not particularly good, involving a single carriageway link to the A658 Bradford to Harrogate Road which in turn links to the Leeds and Bradford Ring Roads. Dedicated buses operate under the Flyer brand to Leeds Bradford and Harrogate, where there are interchanges at rail stations. Public transport mode shares are around 11% with some of this being noted as by rail, which is probably passengers interchanging at stations. A new parkway station on the Leeds to Harrogate rail line is being developed. The station would be about 2 km from the airport linked to the local road network on which there would be a bus transfer to the airport. The station would also serve as a park & ride for the local area including a major employment expansion area next to the airport.

18,800 people live within the 2016 55 Lden noise contour. The Airport operates on a 24 hour basis but there is a night time noise regime which includes quantification of activity, noise insulation schemes, noise preferential routes, target noise levels and restrictions on noisier aircraft at night.

The Airport has permission to extend its existing terminal facilities to accommodate 7 million passengers a year. However, the terminal area and its road access is constrained and it is not clear if the Parkway Station will significantly reduce the levels of road traffic. The runway is oriented northwest-southeast such that it is often subject to crosswinds and its location also means that there are occasional weather-related constraints. In addition Leeds Bradford Airport competes with Manchester Airport, which is well connected by rail to the Yorks and Humber region. For these reasons, we suggest that 5-7 million passengers is a likely throughput for 2035, with further growth later.

Liverpool

- 4.2 million passengers in 2023
- Possible growth to 5-8 million passengers by 2035
- 85.4% from North West, 4.6% from Wales 2017

Liverpool Airport served 5.0 million passengers in 2019 and recovered to 4.2 million in 2023. The Airport is owned by Peel Holdings, part of the Peel Group which owns substantial property and transport infrastructure, particularly in the North West. Liverpool City Council also has a stake.

The Airport is located on the edge of the city of Liverpool with good road access from all parts of the city. The public transport share was 18.7% in 2017, most by bus and coach with some connecting with rail at Liverpool South Parkway Station.

6,900 people live within the 2019 55 Lden noise contour and the Airport has a Quiet Operations Policy which developed as part of the Section 106 agreement associated with a planning permission in 2003. The noisiest types of aircraft are not permitted to operate at night. Most of the approach and take-off routes are over water but there have been changes in the routing of aircraft in the area in recent years.

Growth to between 5 and 8 million passengers by 2035 would be relatively straightforward. The Airport's Strategic Vision to 2030 and Master Plan to 2050 published in 2018 suggested 7.8mppa by 2030 and 11mppa by 2050, including a runway extension, terminal extension and associated development south of runway, and opportunities for a public transport corridor. However, we consider that, although these developments may happen in the longer term, a lower level of activity is more likely by 2035.



Manchester

- 28.1 million passengers in 2023
- Possible growth to 33-38 million passengers by 2035, focused on T2
- 63.4% O&Ds in the North West, 19.2% from Yorks and Humber in 2022
- Cargo could grow to 1-200,000 tonnes
- Airport City development to boost public transport

Manchester Airport served 29.4 million passengers in 2019 and recovered to 28.1 million in 2023. The Airport is owned by the Manchester Airports Group which in turn is owned by ten metropolitan boroughs and IFM Investors.

Surface access is generally good with a network of strategic and local roads. There are both heavy and light rail stations with a range of local, regional and long-distance rail services and the Airport serves many parts of Northern England, Wales and southern Scotland. However, the public transport share, at 20.7%, is lower than other major airports. Plans for a station on HS2 Phase 2 have now been dropped, but new plans are being drawn up as part of the Northern Powerhouse Rail strategy. Until these plans and their implementation become clear the ability to increase the public transport share will be challenging. The Airport City development is well located to make good use of the public transport facilities and services.

The Airport's Noise Action Plan notes that 102,300 people live within the 55 Lden contour as there are substantial residential areas beneath the main approach paths. There are a number of noise controls including financial incentives/penalties, targets and commitments, noise budgets, night number limits and insulation and compensation schemes.

Growth to between 33 and 38 million passengers and 1-200,000 tonnes of cargo by 2035 would be possible with continued redevelopment of the terminals and other related facilities. Cargo growth would be facilitated by the cargo-related developments in the Airport City areas and by the increasing number of key long haul flights to destinations with high demand for air freight. This level of growth would be within the capacity of the two runways and would thus be in line with a policy of making best use of existing runway capacity. Growth would also have to demonstrate that noise is limited and where possible reduced in line with Government policy.

In the longer term, further growth would be possible and the Airport's Sustainable Development Plan published in 2016 indicates that this could be to 45 million passengers per year. This longer term may enable greater certainty about the rail access opportunities being considered following the cancellation of HS2 Phase 2.

Newcastle

- 4.8 million passengers in 2023
- Possible growth to 6-9 million passengers by 2035
- 93.0% O&Ds in the North East, 5.1% from Scotland in 2017

Newcastle Airport served 5.2 million passengers in 2019 and recovered to 4.8 million in 2023. The Airport is owned by seven local authorities (51%) and AMP Capital (49%).

The Airport is connected to the city (about 12 km distant) by the A696 and A167 roads, most of which are dual carriageway and in turn to the A1. There are local bus services to the city centre. The Tyne & Wear Metro opened to the Airport in 1991 and currently provides five trains per hour with a 25 minute journey to the city centre. The Metro also serves many other stations in Newcastle and Sunderland with through ticketing onto the national rail network. New rolling stock is being introduced and the plan is to increase frequency to six per hour. CAA data shows that the Metro and bus services achieved a 14% share of air passenger journeys.

The Airport's Noise Action Plan notes that 4,250 people live within the 55 Lden contour. There are local rules designed to mitigate noise effects but there are no overall limits on aircraft movement numbers and the airport is able to operate for 24 hours a day.

Growth to between 6 and 9 million passengers by 2035 would be possible with continued development of the terminal and other related facilities. The runway has plenty of capacity for this level of growth. The Airport serves the North East with a range of short haul flights and some limited long haul services, and competes with other airports in the area offering similar services. For longer haul flights Manchester and Edinburgh offer alternatives.

The Airport has previously published longer term plans for growth to over 9 million passengers a year. This would require a significant increase in the share of passengers using public transport as well as road improvements. The longer term plans also safeguard for a 700 metre runway extension.

Smaller airports in the North of England

Doncaster Sheffield Airport handled 1.4 million passengers in 2019, but closed in 2022, its based airlines having vacated. Its owners, the Peel Group, decided that it was no longer commercially viable. At the time of this report, efforts are being made to re-open the airport. In this report, we assume the airport remains closed in Scenarios 1 and 2, but that demand is such in Scenario 3 that it can reopen and serve 2 million passengers a year in 2035.

Humberside Airport 137,000 passengers in 2023 and competes with East Midlands and Leeds Bradford for air transport activity and therefore its focus is probably better suited to services related to North Sea and other local industries, in particular those relating to carbon capture and storage.

Teesside Airport served over 900,000 passengers in 2006 but subsequently declined and has not since returned to near this level. It is now owned by the local authorities in the region. It competes with Newcastle and Leeds Bradford Airports but has a limited number of scheduled services. The Airport may be able to grow by attracting a limited number of seasonal routes and it can remain in viable operation by using its location and land to diversify.

Overview of the North of England

There is plenty of runway capacity at the four larger airports, with some excess capacity at the smaller airports. Manchester dominates with a good range of services and has capacity to expand. There is good rail access at Manchester, but it underperforms. Leeds Bradford and Liverpool need to have better public transport access. GHG emissions of 2.12 MtCO₂e for the region would be in line with Carbon Budget 6, of which 1.4 MtCO₂e would be from Manchester Airport. Noise is an issue at Manchester and the Airport will have to demonstrate shrinking contours as it grows. The local authorities in the region are generally supportive and some benefit through ownership. Growth would generally be aligned with local plans and levelling up policies. Domestic flights between the North of England and London compete with rail and this may lead to reductions in flights if rail services improve eg. with HS2. However, cities value their air links with London, in part because of the connection opportunities.



Northern Ireland

Belfast City

- 2.1 million passengers in 2023
- Possible growth to 2.5-3 million passengers by 2035

Belfast City Airport served 2.5 million passengers in 2019 and recovered to 2.1 million in 2023. The Airport is owned by the 3i Group and is also the site a major aircraft manufacturing facility. Belfast City and the other Northern Ireland airports are particularly important in meeting the Government's Union Connectivity strategy.

The Airport is close to the city centre (5 km) and, although there is a rail station nearby and regular bus services, the public transport share is only 6.9%. Given the distance from the city centre, taxis are not expensive and attract 25% of air passengers.

The Airport's Noise Action Plan notes that 12,200 people live within the 55 Lden contour, this relatively high number related to the closeness of the airport to residential areas of the city. There are noise regulations, some as conditions of the operating permission, including night closure, limits on the number of flights and seats (4 million per year).

Growth to between 2.5 and 3 million passengers by 2035 would be possible with continued development of the terminal and other related facilities. The runway has plenty of capacity for this level of growth. Competition with Belfast International, the limited runway length and the environmental limits may constrain the longer term potential.

Belfast International

- 6 million passengers in 2023
- Possible growth to 7-9 million passengers by 2035
- Services play a significant role in Union Connectivity

Belfast International Airport served 6.3 million passengers in 2019 and recovered to 6.0 million in 2023. The Airport is owned by Vinci Airports. Belfast International and the other Northern Ireland airports are particularly important in meeting the Government's Union Connectivity strategy, as well as serving a wide range of international destinations.

The Airport is 21 km from the city centre and public transport is provided by bus and coach, attracting a 15% share in 2019. Road access to the whole of Northern Ireland is satisfactory, including by the province's motorways.

562 people live within the 55 Lden contour and there are local regulations relating to noise mitigation and an insulation grants scheme. The Airport is open 24 hours a day.

Growth to between 7 and 9 million passengers by 2035 would be possible with continued development of the terminal and other related facilities. The runway has plenty of capacity for this level of growth.

City of Derry

City of Derry Airport served 0.2 million passengers in 2019 and recovered to 0.15 million in 2023. The Airport is owned by the City and district councils. It serves the City of Derry and the north of Northern Ireland and is close to the border of the Republic of Ireland. While it has previously handled over 400,000 passengers and has had significant investments, it seems unlikely to return to this level of activity by 2035.

Overview of Northern Ireland

The two Belfast airports complement each other as well as competing. There seem to be no significant challenges to growth in the next 10-15 years. The airports also compete with Dublin Airport in the Republic of Ireland and Dublin's wider range of long-haul services have proved attractive with lower taxes and US pre-clearance. Northern Ireland's Air Passenger Duty rates are designed to address the competition. A small proportion of passengers' O&Ds are from the Republic. To keep within its share of Carbon Budget 6 for aviation, Northern Ireland's airports would have to have GHG emissions of around 0.41 MtCO₂e by 2035. CILT's evidence to the Union Connectivity Review noted the suitability of routes to Northern Ireland for trials of zero emission aircraft.

Scotland

Aberdeen

- 2.2 million passengers in 2023
- Possible growth to 3-4 million passengers by 2035
- Activity related to North Sea industries

Aberdeen Airport served 2.9 million passengers in 2019 and recovered to 2.2 million in 2023. For many years the Airport has handled around 3 million passengers a year and its fortunes have been related to the level of activity in the industries in the North Sea. It is a particularly important base for helicopter activity. The airport also provides services related to Union connectivity, with London and other UK cities. The Airport is owned by AGS Airports who also own Glasgow and Southampton Airports.

The Airport is 9 km from the city centre and public transport is provided by bus and coach, attracting a 15.6% share in 2018.

16,150 people live within the 55 Lden contour. Helicopter noise is a particular feature. The Airport is open 24 hours a day although there are very few movements at night.

Growth to between 3 and 4 million passengers by 2035 is clearly possible and has been almost achieved in the past. A previous master plan envisaged 5 million passengers. As noted above, activity is related to North Sea industries and may change with the changing nature of this from oil and gas to carbon capture and storage.

Edinburgh

- 14.4 million passengers in 2023
- Possible growth to 18-21 million passengers by 2035

Edinburgh Airport served 14.7 million passengers in 2019 and recovered to 14.4 million in 2023. There has been steady growth over many years and even during the 2008-2010 downturn there was only a small reduction. The Airport has a full range of flights with the most frequent to London but with connections to all parts of the UK as well as many international destinations, including several transatlantic routes. The Airport is majority owned by Vinci with the minority share managed by Global Infrastructure Partners.

The Airport is 9 km from the city centre and public transport is provided by bus, coach and tram attracting a 40.1% share in 2018. The Airport is connected to the motorway and local road networks including to the Forth crossings. The Edinburgh Tram was opened in 2014 offering a service every 7 minutes and a 30 minute journey time.

13,800 people live within the 55 Lden contour. Noise and track keeping are monitored and there are local regulations with stricter controls at night.

Growth at Edinburgh Airport is linked to growth in the UK and, in particular, the Scottish economy. There are good prospects for further growth and previous master plans have indicated that up to 25 million passenger a year can be accommodated by terminal and apron extensions. This level would be well within the runway capacity although a second runway remains safeguarded for the longer term. There are also plans for a major 'airport city' type development adjacent to the Airport and there are possibilities for direct links to the motorways and for tram upgrades.

Glasgow

- 7.8 million passengers in 2023
- Possible growth to 9-12 million passengers by 2035

Glasgow International Airport served 8.8 million passengers in 2019 and recovered to 7.8 million in 2023. It has been operating at around this level for 20 years although it reached almost 10 million in 2017. It is owned by AGS Airports who also own Aberdeen and Southampton Airports. It has a good range of domestic flights, including to the Western Isles, as well as international leisure and links to European and Middle East hubs.

The Airport is 16 km from the city centre and public transport is provided by bus and coach, attracting a 11.6% share in 2018. Consideration has been given to several options for a rail link over the years, the most recent being for the 'Clyde Metro'.

47,000 people live within the 55 Lden contour. There are local regulations and procedures but the airport is open 24 hours a day.

Growth at Glasgow Airport would be possible by some changes to the terminal facilities but may well be constrained by surface access and noise considerations, at least in the medium term.

Inverness

- 0.8 million passengers in 2023
- Possible growth to 1-1.5 million passengers by 2035

Inverness Airport served 0.9 million passengers in 2019 and recovered to 0.8 million in 2023. It is owned, along with 10 other airports, by Highlands and Islands Airports Ltd., in turn owned by the Scottish Government. Services are focused on Scotland with some links to European cities.

The Airport is 13 km from the city centre and public transport is provided by bus and coach, attracting a 13.9% share in 2018. In 2023 a new station was opened on the Inverness to Aberdeen rail line.

Information on noise is limited but, given its size and location, the impact is likely to be limited.

Growth to 1-1.5 million passengers by 2035 is possible and a draft master plan showed how this would be achieved.

Prestwick

- 0.5 million passengers in 2023
- Possible growth to 0.6-1.0 million passengers by 2035

Glasgow Prestwick Airport served 0.6 million passengers in 2019 and recovered to 0.5 million in 2023. It is owned by the Scottish Government. In the 2000s it handled more than 2.4 million passengers a year but declined in the 2010s. It now provides mostly leisure routes and competes with Glasgow International Airport.

The Airport is 51 km from the city of Glasgow but a rail station provides good access. The most recent mode share data is from 2009, when the public transport share was 37.2%.

Growth is clearly possible but the market seems to be limited and with Glasgow International providing a much wider range of service it seems likely that growth at Prestwick will be limited, albeit a doubling of current numbers.

Smaller Airports in Scotland

Kirkwall Airport in the Orkneys served 134,000 passengers in 2023. Stornoway Airport serves the main town of the Western Isles and handled 105,000 passengers in 2023. Sumburgh Airport serves the Shetland Islands and handled 258,000 passengers in 2023. All three airports are owned, along with eight others, by Highlands and Islands Airports Ltd., in turn owned by the Scottish Government. They are part of the network of airports providing vital links between the Highlands and Islands and linking them to mainland many of which are the subject of PSOs. Their activity depends on their economies, in particular relating to tourism and energy.

Overview of Scotland

The three main airports have capacity for growth and Union Connectivity policy should assist. Domestic flights between Scotland and London compete with rail and this may lead to reductions in flights if rail services improve eg. with HS2. However, cities value their air links with London, in part because of the connection opportunities, so policy should not seek to restrict flights. Note that the Jet Zero target is for domestic flights to be net zero by 2040. Local authorities are generally supportive and growth would be aligned with local plans and levelling up policies. Scottish Government GHG and transport policies may diverge from the UK but should not constrain aviation growth. The numbers in this paper would result in Scotland's passenger numbers growing by 52% between 2023 and 2035, much more than the UK average of 30%.

To keep within its share of Carbon Budget 6 for aviation, Scotland's airports would have to have GHG emissions of around 1.28 MtCO₂e by 2035. Many of the routes are ideal candidates for trials of zero emission aircraft which has been recognized by the Scottish Government and proposals have been made by various parts of the aviation industry for such flights.

South East and Eastern England

Gatwick

- 40.9 million passengers in 2023
- Possible growth to 52-58 million passengers by 2035
- 80.8% O&Ds from South East, 7.6% from East 2022
- Northern Runway subject to Planning Inquiry

Gatwick Airport served 46.6 million passengers in 2019 and recovered to 40.9 million in 2023. The Airport is owned by Global Infrastructure Partners and Vinci with investors including sovereign wealth funds and pension funds. The Airport has a wide range of flights with Easyjet being the largest airline in terms of passenger numbers, with British Airways and Tui the other largest airlines. The Airport has a mix of short and long haul flights, including transatlantic, and to European, Middle East and Asian hubs. Passenger numbers did not grow much in the 2000s but did in the 2010s. In 2023 there were 253,000 Air Transport Movements on the runway and the Airport handled 61,000 tonnes of cargo.

Surface access is very good with the main road access from the M23 motorway, in turn linked to the M25. Rail access is particularly good with a rail station integral with the South Terminal providing 13 trains per hour to a range of destinations, including alternative London stations and routes north of London and to the south of the Airport. The public transport mode share was 44% in 2022 but it had been above 50% in previous years. The rail station has been recently upgraded.

The Airport's Noise Action Plan notes that 13,500 people live within the 55 Lden contour. Controls include noise abatement procedures and night flight limits. There is an insulation grant scheme.

The Airport is seeking permission to grow through the Northern Runway project, which would convert the existing emergency only runway into a full time operation, albeit with a capacity limited by the need to co-ordinate the operation of the existing main runway and the Northern Runway, as they are too close to operate independently. Permission is being sought through the NSIP (Nationally Significant Infrastructure Project) process and an Examination began on 27 February 2024 and is expected to close on 27 August 2024. The process then requires a report within three months and the Secretary of State to make a decision in a further three months.

The Northern Runway examination is hearing a large volume of evidence which cannot even be summarised in this report, but perhaps the most relevant issues noted by the Airport are:

- With the Northern Runway project, there would be growth to 75 million passengers by 2040 compared with 63 million without it.
- Cargo throughput is forecast to grow to 200,000 tonnes.
- The public transport mode share is forecast to be 55%.
- The population within the 55dB Lden noise contour would increase marginally.

CILT has submitted evidence to the Examination in which we support the proposals but have questioned the cargo forecasts and suggested that, in order to provide a share of community benefit and to provide respite, there should be a night ban for a limited period. We have also suggested that more attention should be given to east-west transport links, particularly with Kent. On GHG emissions, we have suggested that a condition should be imposed that aligns permitted growth with the reduction in the Airport's emissions, including those made by aircraft en route (ie. Scope 3), in line with the Carbon Budgets. Using this mechanism as noted earlier in this paper, GHG emissions would need to be no more than 2.03 MtCO₂e by 2035. It is recognised that a throughput of 52-58 million passengers is below the throughput estimate made by the Airport without the Northern Runway, but it is nevertheless 27%-42% growth on 2023 levels, higher than the average for the South East and Eastern England. In the longer term it can be expected that growth will continue, albeit while still keeping aligned to the Carbon Budgets which are making their way towards net zero in 2050. In the very long term is relevant to note that a fully separated runway to the south of the Airport remains safeguarded.

The throughput suggested in this paper for Gatwick is partly related to the situation at Heathrow (see below). In our view, a third runway at Heathrow is unlikely to be in place by 2035. However, if it is, then the growth prospects for Gatwick are inevitably reduced, as many airlines would seek to transfer services from Gatwick to Heathrow. In these unexpected circumstances, it is likely that Gatwick would see little or no growth.

Heathrow

- 79.1 million passengers in 2023
- Possible growth to 88-95 million passengers by 2035
- 72.7% O&Ds from South East, 8.1% from East 2022, 6.9% from South West 2022
- Third runway on hold

Heathrow Airport served 80.9 million passengers in 2019 and recovered to 79.1 million in 2023. The Airport was owned by Ferrovial, Qatar Investment Authority and a number of investment organisations and pension funds. There is currently a sale process under way and the new ownership may be confirmed as this report is published. Heathrow is the UK's largest airport for both passengers and freight and is the fourth largest in the world in terms of total passengers. It has a full range of flights to all parts of the world and is a major hub for British Airways. In 2023 the Airport handled 1.387k tonnes of cargo and had 456,600 Air Transport Movements. Growth was slow in the 2000s but picked up in the 2010s.

Road access is provided direct from the M4 and M25 motorways and from the A4 and A30. Rail access consists of the Piccadilly Line, Heathrow Express and the Elizabeth Line, providing a wide choice of services for London, but with no direct non-London connections. There is a wide range of longer distance coach services as well as links to rail stations, and an extensive network of local buses particularly suited to staff. The public transport share was 33.9% in 2022 having been 40.1% in 2019. The Elizabeth Line has only been in full operation since 2023 so its effect is not yet apparent in the mode share data. HS2 Phase 1 is expected to open between 2029 and 2032 and will provide connection opportunities at Old Oak Common Station.

Noise is clearly the major local issue at Heathrow with 664,300 people within the 55 Lden contour in 2019 although this number has reduced since 2006. There are multiple controls including noise abatement procedures, financial incentives and an insulation grant scheme. There are night limits in terms of numbers and a Quota Count and there is a voluntary core night ban. Use of the runways is alternated between arrivals and departures to provide respite for periods of the day.

The current ANPS gives policy support to a third runway, subject to it being able to demonstrate an acceptable balance of impacts and benefits. The Airport began the NSIP/DCO process in 2018 but paused it in 2020 as the pandemic took hold. The material published at the time may now be out of date, but it is worth noting some of the key features of the third runway project at that time, as follows:

- Projected passenger throughput of 130 million passengers, 3,000k tonnes of cargo and 750,000 Air Transport Movements.
- The M25 would need to be rebuilt below the third runway and several roads re-routed.
- New rail links may be built in any event, but would not be essential for a third runway
- The population with the noise contours would reduce, but the shape of the contours would change with new flight paths associated with a third runway. New airspace arrangements would also result in changes to the areas affected by noise, some less, some more.
- Significant areas of land, residential communities and commercial property would have to be acquired.
- GHG emissions were forecast to increase by 4 MtCO₂e.
- The capital cost was expected to be around £15 billion.

With the third runway on hold, there is an opportunity to consider a medium term strategy based on the existing two runways, with the following features:

- Projected passenger throughput of between 88 and 95 million passengers, 1,800-2,000k tonnes of cargo and 500,000 Air Transport Movements in 2035.
- A 'public transport first' strategy to enhance the current rail, bus and coach stations in the central area (Terminals 2 and 3)(Eastern Campus) and at Terminal 5 (Western Campus).
- Expansions or redevelopments of the terminals in the Eastern and Western Campuses.
- New Airport entry points leading to 'gateway' drop off, pick up and parking facilities to the north and south east of the airport, with a possible third facility based on Terminal 4 when that terminal closes.
- New rail links to the west and south irrespective of expansion but made more viable by a larger market. HS2 Phase 1 to provide connection opportunities at Old Oak Common Station.
- Redevelopment and expansion of the cargo facilities, possibly into the area currently occupied by Terminal 4 when that terminal closes.
- Modifications to airspace and air traffic control arrangements to retain as much respite as possible and limit, and if possible, reduce, the numbers of people within the noise contours.
- Some land and property acquisition at the perimeter of the Airport.
- GHG emissions of 4.21 MtCO₂e in 2035 would be aligned with Carbon Budget 6.

It is possible that this development would not be considered as a NSIP given that it does not involve a new runway. However, the combination of proposals and the potential increase in capacity is such that it would be much more appropriate to deal with as a NSIP, with a number of the developments bundled together, even if they are built in phases over many years.

This medium term strategy would not preclude the third runway being built at a later date and, indeed, it remains safeguarded by the designation of the land as green belt, which prevents inappropriate development.

88-95 million passengers in 2035 is a growth of 11%-20% from 2023, well below the average for the UK and also below the rate for the South East and East of England. It is likely to result in a reduction in the proportion of Heathrow's traffic which is connecting, which held steady at around 35% for many years but was 25% in 2022. Terminating passengers with O&Ds in the UK will therefore grow at a higher rate. This means that surface access demand will be proportionately higher but this will have a positive effect on the business cases for new rail links. 88-95 million passengers on 500,000 Air Transport Movements is an average of 176-190 per movement. This compares with 173 in 2023 and would happen with the gradual replacement of aircraft by marginally larger types, eg. the Airbus A320 by the A321, or the Boeing 777 by the B777X.



London City

- 3.4 million passengers in 2023
- Possible growth to 5-6 million passengers by 2035
- 42% passengers are business

London City Airport handled 5.1 million passengers in 2019 but its recovery in 2023 was only to 3.4 million. The Airport has the highest proportion of business passengers in the UK although the majority are leisure. The Airport is owned by consortium of Canadian and other investors.

The Airport's runway is 1,500 metres and steep approaches are needed because of the location, limiting the size and type of aircraft that can operate. The site is surrounded by water although expansion has been possible by building over the water. A number of developments have been completed in accordance with the City Airport Development Plan.

The Airport is located 10 km from the City of London and 5 km from Canary Wharf. Road connections are through the London road network and public transport is primarily provided by the DLR, with a station immediately adjacent to the terminal and 12 trains per hour off peak. The public transport share is among the highest in the UK at around 50%. The DLR provides connections to many stations on the London transport rail network, including to the Elizabeth Line. The Elizabeth Line runs close to the Airport but there are currently no plans for a station to serve the Airport.

75,200 people live within the 2016 55dB Lden contour, the large number because of the dense population nearby. The Airport has a range of stringent noise regulations and opening hours, including closure between 1200 hours on Saturdays to 1200 hours on Sundays.

The Airport has applied for permission to grow from the current capacity of 6.5 million passengers a year to 9 million. One of the key elements of the application is to open on Saturday afternoons and evenings when flights are currently not permitted and also to change some of the early morning restrictions. A public inquiry took place in January 2024 and the outcome is awaited.

Notwithstanding the inquiry outcome, CILT suggests that growth to 2035 will be to between 5 and 6 million passengers. Note that this would be a growth of 46-75%, significantly more than any other London airport and more than the UK average. In the longer term, demand may continue to increase and, depending on the inquiry outcome, growth may be permitted.

Luton

- 16.4 million passengers in 2023
- Possible growth to 20-25 million passengers by 2035
- 53.6% O&Ds in the South East, 27.1% from Eastern England, 8.4% from East Midlands 2022

From handling over 18 million passengers in 2019, Luton Airport recovered to 16.4 million in 2023. Growth had been more or less continuous since the 1990s. The Airport had traditionally served the outbound leisure market and became the base for easyjet and other low cost operators. It is owned by Luton Rising which is in turn owned by Luton Borough Council and is operated on a long term concession by a consortium of AENA the Spanish state airport operator and AMP Capital. It is also, perhaps surprisingly, the second largest airport in terms of Business Aviation aircraft movements.

Luton Airport is linked to the M1 motorway via the A1081 and to local roads. Luton Parkway Station is 3km away and is now linked by the DART automated transit. There are extensive networks of coaches and local buses. Public transport attracted 44% of air passengers in 2019, which dropped to 35% in 2022.

17,000 people lived within the 55 dB Lden contour in 2016. There are regulations and restrictions including a night movements limit on numbers and insulation schemes.

The Airport's current capacity is 19 million passengers a year, having been granted approval for this level in 2023. However, the Airport has sought approval to expand to 32 million passengers a year and an examination took place between August 2023 and February 2024. The project was considered as a NSIP because it sought approval for growth of more than 10 million passengers a year. The outcome is now awaited. The main points in the Airport's application were as follows:

- A new terminal to the east of the airport, new taxiway connections and extensions to the roads and the DART link.
- A 'Green Controlled Growth' mechanism which links permitted growth at stages to a number of environmental targets on noise, surface access, air quality and GHG emissions.
- The population within noise contours would decrease but not as much as without the development but nevertheless sharing the benefits of reduced aircraft noise levels.

CILT has submitted a written representation to the Examination which supports the proposals subject to the following:

- We note that Luton serves London and parts of the Midlands and Eastern regions, providing competition with other London airports.
- More can be done to promote the wide range of public transport services.
- In order to provide a share of community benefit and to provide respite, there should be a night ban for a limited period.
- We think that Luton's role for Business Aviation may be constrained by the prioritisation of runway capacity for Air Transport Movements.
- As for other NSIPs we have suggested that the Green Controlled Growth mechanism should include aviation GHG emissions and should align permitted growth with the Carbon Budgets. Using this mechanism as noted earlier in this paper, GHG emissions would need to be no more than 0.81 MtCO₂e by 2035.

If the Airport's expansion plans are approved, it is CILT's view that this will result in between 20 and 25 million passengers in 2035, with further growth beyond.

... The Airport's current capacity is 19 million passengers a year, having been granted approval for this level in 2023 ...

Manston

- Currently closed
- Possible growth to 1-200,000 tonnes of cargo by 2035
- Possible 0.5 million passengers by 2035

Manston is currently closed but has plans to re-open as a predominantly freight airport. During the 2000s it was handling significant amounts of cargo and a few air passengers on scheduled and charter flights, but this declined by the early 2010s. It also provided capacity for test and training and other associated activity until its closure in 2014. It is now owned by Riveroak Strategic Partners (RSP).

RSP's forecasts include all cargo aircraft movements of 17,000, more than the threshold of 10,000 which makes the project a NSIP. A DCO was submitted in 2018 and the Examination took place in 2019. Approval was given in July 2020 but, following a legal challenge, this was withdrawn and then re-determined in 2022, again giving approval. However, there have been further legal challenges including to the Appeal Court which have now been dismissed.

As noted earlier, air cargo forecasting is particularly challenging and this has been the nub of the debates about Manston, with various parties offering different perspectives of the need argument. Heathrow handles by far the largest amount of air cargo in the UK, at 1.4 million tonnes, but 90% of this is in the belly holds of passenger aircraft. East Midlands is the largest UK airport for freight carried in all-cargo aircraft (0.35 million tonnes), followed by Stansted (0.24 million tonnes). No other airports handles more than 0.1 million tonnes. Heathrow can clearly grow its belly-hold cargo volume and East Midlands its all-cargo traffic as noted above. Stansted's growth may be more limited by its plans to grow passenger numbers. It will, in the end, be for the industry to decide if it wishes to invest in the plans. In our view, between 100,000 and 200,000 tonnes of cargo would be reasonable by 2035, plus 0.5 million passengers in Scenarios 2 and 3.

Norwich

- 0.4 million passengers in 2023
- Possible growth to 0.5-0.6 million passengers by 2035

Norwich Airport served 0.5 million passengers in 2019 and recovered to 0.4 million in 2023. It serves the relatively dispersed market of East Anglia and has very strong competition from the much larger Stansted. It serves a few domestic and some holiday routes, with a link to Amsterdam. It is owned by Regional & City Airports who also own a number of other UK airports.

There are no particular barriers to expansion and growth to between 0.5 and 0.6 million passengers by 2035 is possible.

Southampton

- 0.8 million passengers in 2023
- Possible growth to 1-1.5 million passengers by 2035
- Runway extension completed in 2023

Southampton Airport served 1.8 million passengers in 2019 but only 0.8 million in 2023. Close to 2 million passengers were handled in most years of the 2000s and 2010s and it was a base for Flybe, but the airline went into administration in 2020. The Airport is owned by AGS Airports, who also own Aberdeen and Glasgow Airports. The Airport serves the cities on the South Coast but is also accessible from much of the South East and South West and has long been a hub for the Channel Islands. It now has a range of mainly domestic flights.

The Airport is very close to the M27 motorway and is served by Southampton Parkway Station and in 2016 the public transport share was 25%. 5,600 people live within the 2016 55 Lden contour.

The Airport was granted permission to extend the runway in 2021 and the extension was completed in 2023. The new length enables larger aircraft to operate with heavier loads and the Airport hopes this will attract more airlines. The terminal area and access is limited in space and, while close to 2 million passengers a year have been accommodated previously, in our view a throughput of 1-1.5 million by 2035 is appropriate.

Southend

- 0.1 million passengers in 2023
- Possible growth to 0.5-1.0 million passengers by 2035

Southend Airport served 2.0 million passengers in 2019 but has not recovered since the pandemic. Previously the Airport had been a base for Easyjet and other airlines but these have not returned. The Airport is owned by Esken but is currently for sale.

50.6% of passenger O&Ds are in the South East region and 45.3% in Eastern England. The Airport is connected by the local road network to the A127 London-Southend Road. Southend Airport Station is a short distance from the terminal and has 6 trains per hour to London. The public transport share was 38.6% in 2019. 2,200 people lived within the 2016 55 Lden contour.

While the Airport has a good rail link to London and is clearly capable of serving 2 million passengers a year, it is our view that other London airports will be able to offer many competing services which will limit Southend's growth to between 0.5 and 1 million passengers in 2035.

Stansted

- 28 million passengers in 2023
- Possible growth to 34-40 million passengers and 300k tonnes of cargo by 2035
- Terminal extension approved

From handling over 28.1 million passengers in 2019, Stansted Airport almost reached the same level in 2023. Nearly 24 million passengers were handled in 2006 and 2007 but numbers then declined before picking up again in 2014. The Airport is a major base for Ryanair and has a wide range of leisure flights including some long-haul flights. 55.3% of passenger O&Ds are in the South East and 33.4% in Eastern England. 252k tonnes of cargo was handled in 2023, the majority on all-cargo aircraft. The Airport is owned by the Manchester Airports Group and IFM Investors.

Stansted Airport is served directly by the M11 motorway and the A120. A rail station is part of the terminal and there are four Stansted Express trains per hour with additional trains to Cambridge and beyond. In 2022 the public transport share was 45.4%, down 52.3% from 2019.

8,700 people lived within the 55 dB Lden contour in 2016. There are regulations and restrictions including a night movements limit on numbers and insulation schemes.

There is a long history of plans for expansion, with the current terminal originally having been approved in 1985. In the 2000s, Government policy was for a second runway but this was cancelled in 2010. Major expansions were proposed during the Airports Commission of 2012-2015 but did not make the short list. The current permission to grow to 43 million passengers a year was given in 2022 after an inquiry. However, there is a limit on Air Transport Movements of 264,000. In order to accommodate 43 million passengers in the terminal, an extension has been approved.

In our view, Stansted will continue to grow to between 34 and 40 million passengers in 2035. This would be about the same level as the average for the South East and Eastern regions but the limit on ATMs and competition from other London airports will mean that it takes longer to fully use the approved capacity. Some growth of cargo will also take place but, again, the ATM limit will constrain this growth.

The possibility of further expansion beyond 43 million in the longer term would require reconsideration of a second runway, plus significant improvements to surface access, in particular to the journey time for the rail service to London.

Overview of South East and Eastern England

With our suggested throughputs in 2035, airports in the South East and Eastern England would have between 59% and 62% of the UK's total, down from 62% in 2023. 2023-2035 growth would be 19%-35%, which is between 1.5% and 2.5% pa CAGR. In some years growth will be faster, but there may well be declines in others. Overall this might seem modest, but it nevertheless means an additional 32-59 million passengers in 2035 compared with 2023. We recognise the constraints, physical and environmental, which we think will result in this level of growth. We see a higher growth rate for cargo of 35%-54% between 2023 and 2035, albeit with a reducing share of the UK total.

We have noted that airports which are planning NSIPs should be constrained by levels of GHG emissions aligned to the Carbon Budgets. For the South East and Eastern England as whole we would expect emissions of 8.72 MtCO₂e would be aligned with Carbon Budget 6.

South West England

Bournemouth

- 1 million passengers in 2023
- Possible growth to 1.2-2.0 million passengers and 50-100k tonnes of cargo by 2035



Bournemouth Airport handled 0.8 million passengers in 2019 and recovered to 1.0 million in 2023. Numbers have been up and down over the last 20 years but the main services have been European leisure destinations. Recently freight activity has increased significantly. It is owned by Regional & City Airports.

The Airport is 6km from Bournemouth but accessible to a large population via the motorway and road network. There are non-dedicated bus services including to Bournemouth rail station.

In 2016 400 people lived within the 55 Lden contour.

While the Airport has no real capacity constraints, there is competition from Southampton which is more accessible, so we think that between 1.2 and 2.0 million passengers would be an appropriate figure for 2035. There is good potential for all-cargo flights which could handle between 50k and 100k tonnes in 2035.

Bristol

- 9.9 million passengers in 2023
- Possible growth to 12 million passengers by 2035

Bristol Airport reached almost 10 million passengers in 2023, from 9 million in 2019. It grew steadily over the last 20 years and handles mainly outbound European leisure flights and some scheduled domestic services. It is owned by the Ontario Teachers' Pension Plan.

The Airport is 13km from the city centre connected by the A38, a mainly single carriageway road. The Airport Flyer is the main bus service to the city and there are other routes to Bristol and other nearby towns. 76.2% of passenger O&Ds are in the South West and 21.1% are in Wales. The public transport share was 21.8% in 2019. It has commenced construction of a major new transport hub and car park.

3,000 people lived within the 55 Lden contour in 2017. There are several restrictions and mitigation measures including a Quota Count system for night flights.

Following a public inquiry, the Airport has permission to grow to 12 million passengers a year. There was significant opposition on grounds of surface access, green belt, noise and emissions but the Inquiry found in favour of expansion. Nevertheless it is clear that further expansion will be challenging, particularly given the lack of a rail link. In CILT's view this is likely to restrict capacity to 12 million passengers in 2035.

Exeter

- 0.4 million passengers in 2023
- Possible growth to 0.6-0.8 million passengers by 2035

Exeter Airport handled 0.4 million passengers in 2023, compared with over 1 million in 2019. It was an engineering base for Flybe and lost significant traffic when that airline folded. It is owned by Regional & City Airports.

The Airport is 6km from the city centre connected by the A30. Buses connect to the city and rail stations.

The relatively small market and competition from other airports could well limit growth to between 0.6 and 0.8 million passengers by 2035. Albeit this is nearly double the 2023 throughput.

Newquay

- 0.4 million passengers in 2023
- Possible growth to 0.5-0.6 million passengers by 2035

Newquay Airport reached almost 0.4 million passengers in 2023, just below the 2019 throughput. Its main regular services are domestic inbound flights related to tourism in the South West, including flights to London airports. It is owned by Cornwall Council. It is the location of Spaceport Cornwall.

The Airport is 7km from Newquay town centre but accessible by road to the tourist areas.

Competition from road and rail means that the airport will probably not grow to more than between 0.5 and 0.6 million passengers by 2035.

Overview of South West England

Our view about South West England is dominated by our view that Bristol Airport may not be permitted to grow beyond 12 million passengers by 2035, while the other airports could grow significantly but from a small base. Road and rail competition and access to other airports will always be significant.

Wales

Cardiff

- 0.8 million passengers in 2023
- Possible growth to 1-1.5 million passengers by 2035

Cardiff Airport exceeded 0.8 million passengers in 2023, although this was well below the 2019 throughput of 1.7 million. It had exceeded 2 million in the 2000s but declined in the 2010s. 94.9% of passengers have O&Ds in Wales, 4.9% from England. The Airport is owned by the Welsh Assembly Government.

The Airport is 23km from Cardiff city centre. There is an hourly train service from a nearby station with a bus to the Airport. There is also an hourly bus service to the city and some long distance coaches. Public transport mode share was 11.3% in 2019.

South Wales is connected to airports in England by road, and possibly to Heathrow via a future western rail link, and Cardiff Airport finds it difficult to compete with the wider range of services available, so we expect that growth to 2035 will be to between 1 and 1.5 million passengers, nevertheless a growth of up to nearly 80%.

Overview of Wales

Cardiff is the only airport of any size and we expect growth to between 1 and 1.5 million passengers by 2035. Mid and North Wales are well served by airports in England. Wales' share of GHG emissions in 2035 equates to 0.04 MtCO₂e.

... Newquay Airport reached almost 0.4 million passengers in 2023, just below the 2019 throughput. Its main regular services are domestic inbound flights related to tourism in the South West, including flights to London airports ...

Small airports



Airports handling less than 100,000 passengers are not noted in the regional analysis above but in total served about 250,000 passengers in 2023. However, in addition to commercial air transport operations, many small airports specialize in particular sectors, or provide for General Aviation. Business Aviation has a particular definition in CAA statistics, and the largest Business Aviation airports are Farnborough, Luton, Biggin Hill.

Northolt and Stansted. Many smaller airfields have flying schools which provide much of the initial training for both private and commercial pilots. Some airports have aviation related manufacturing or support facilities. In general, these smaller airports provide a balance of economic benefits without many adverse effects to their local communities, although some plans are controversial.

Summary

In the following tables, the individual airport figures are summed and they show that, between 2023 and 2035, total UK growth in passengers would be between about 20% and 40%, CAGRs of between 1.5% and 2.8% per year. The South East and Eastern England growth rate would be between about 19% and 35%. Airports in the rest of the UK would grow at between 20% and 49%.

We see cargo growth as being greater than for passengers, at 36% in Scenario 1 and 64% in Scenarios 2 and 3 for 2023 to 2035, with regional variations related to the small number of airports likely to handle significant volumes of cargo.

While it is entirely possible that individual airports may grow at faster rates, and some slower, this level of growth seems appropriate given the chances of further shocks and the constraints related to either local or national environmental issues. CILT's view, already noted, is that it is entirely a matter for the airport owner to decide if they want to invest for growth and, if permission is required, that is a matter for the normal planning system, be it a NSIP or the planning system for small projects, which seeks to find the balance between benefits and adverse effects.

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Scenario 1

AIRPORT	PASSENGERS 2023		PASSENGERS 2035		GROWTH	CARGO 2023		CARGO 2035		GROWTH	GHG EMISSIONS MtCO ₂ e
	MILLIONS	SHARE	MILLIONS	SHARE		M TONNES	SHARE	M TONNES	SHARE		
GATWICK	40.9	14.9%	52	15.9%	27.2%	40.9	14.9%	52	15.9%	27.2%	27.2
HEATHROW	79.1	28.9%	88	26.9%	11.2%	79.1	28.9%	88	26.9%	11.2%	11.2
LONDON CITY	3.4	1.3%	5	1.5%	45.8%	3.4	1.3%	5	1.5%	45.8%	45.8
LUTON	16.4	6.0%	20	6.1%	22.0%	16.4	6.0%	20	6.1%	22.0%	22.0
MANSTON	0.0	0.0%	0	0.0%	-	0.0	0.0%	0	0.0%	-	-
NORWICH	0.4	0.1%	0.5	0.2%	39.7%	0.4	0.1%	0.5	0.2%	39.7%	39.7
SOUTHAMPTON	0.8	0.3%	1	0.3%	32.5%	0.8	0.3%	1	0.3%	32.5%	32.5
SOUTHEND	0.1	0.1%	0.5	0.2%	242.5%	0.1	0.1%	0.5	0.2%	242.5%	242.5
STANSTED	28.0	10.2%	34	10.4%	21.6%	28.0	10.2%	34	10.4%	21.6%	21.6
SE & E TOTAL	169.1	61.7%	201	61.5%	18.9%	169.1	61.7%	201	61.5%	18.9%	18.9
BIRMINGHAM	11.5	4.2%	14	4.3%	22.0%	11.5	4.2%	14	4.3%	22.0%	22.0
EAST MIDLANDS	3.9	1.4%	5	1.5%	27.2%	3.9	1.4%	5	1.5%	27.2%	27.2
MIDLANDS TOTAL	15.4	5.6%	19	5.8%	23.3%	15.4	5.6%	19	5.8%	23.3%	23.3
DONCASTER SHEFFIELD	1.4	0.5%	0	0.0%	-	1.4	0.5%	0	0.0%	-	-
HUMBERSIDE	0.1	0.1%	0.2	0.1%	46.0%	0.1	0.1%	0.2	0.1%	46.0%	46.0
LEEDS BRADFORD	4.0	1.5%	5	1.5%	25.3%	4.0	1.5%	5	1.5%	25.3%	25.3
LIVERPOOL	4.2	1.5%	5	1.5%	19.2%	4.2	1.5%	5	1.5%	19.2%	19.2
MANCHESTER	28.1	10.2%	33	10.1%	17.5%	28.1	10.2%	33	10.1%	17.5%	17.5
NEWCASTLE	4.8	1.8%	6	1.8%	24.5%	4.8	1.8%	6	1.8%	24.5%	24.5
TEESSIDE	0.2	0.1%	0.3	0.1%	32.7%	0.2	0.1%	0.3	0.1%	32.7%	32.7
NORTH TOTAL	42.6	15.6%	49.2	15.1%	15.4%	42.6	15.6%	49.2	15.1%	15.4%	15.4
BELFAST CITY	2.1	0.8%	2.5	0.8%	18.2%	2.1	0.8%	2.5	0.8%	18.2%	18.2
BELFAST INTERNATIONAL	6.0	2.2%	7	2.1%	17.5%	6.0	2.2%	7	2.1%	17.5%	17.5
CITY OF DERRY	0.2	0.1%	0.2	0.1%	29.9%	0.2	0.1%	0.2	0.1%	29.9%	29.9
NI TOTAL	8.2	3.0%	9.7	3.0%	17.9%	8.2	3.0%	9.7	3.0%	17.9%	17.9
ABERDEEN	2.2	0.8%	3	0.9%	34.5%	2.2	0.8%	3	0.9%	34.5%	34.5
EDINBURGH	14.4	5.3%	18	5.5%	25.0%	14.4	5.3%	18	5.5%	25.0%	25.0
GLASGOW	7.4	2.7%	9	2.8%	22.3%	7.4	2.7%	9	2.8%	22.3%	22.3
INVERNESS	0.8	0.3%	1	0.3%	24.8%	0.8	0.3%	1	0.3%	24.8%	24.8
KIRKWALL	0.1	0.0%	0.2	0.1%	49.3%	0.1	0.0%	0.2	0.1%	49.3%	49.3
PRESTWICK	0.5	0.2%	0.6	0.2%	14.5%	0.5	0.2%	0.6	0.2%	14.5%	14.5
STORNOWAY	0.1	0.0%	0.2	0.1%	90.5%	0.1	0.0%	0.2	0.1%	90.5%	90.5
SUMBURGH	0.3	0.1%	0.3	0.1%	16.3%	0.3	0.1%	0.3	0.1%	16.3%	16.3
SCOTLAND TOTAL	25.8	9.4%	32.3	9.9%	25.2%	25.8	9.4%	32.3	9.9%	25.2%	25.2
BOURNEMOUTH	1.0	0.3%	1.2	0.4%	26.3%	1.0	0.3%	1.2	0.4%	26.3%	26.3
BRISTOL	9.9	3.6%	12	3.7%	21.1%	9.9	3.6%	12	3.7%	21.1%	21.1
EXETER	0.4	0.2%	0.6	0.2%	38.6%	0.4	0.2%	0.6	0.2%	38.6%	38.6
NEWQUAY	0.4	0.1%	0.5	0.2%	22.2%	0.4	0.1%	0.5	0.2%	22.2%	22.2
SW TOTAL	11.7	4.3%	14.3	4.4%	22.2%	11.7	4.3%	14.3	4.4%	22.2%	22.2
CARDIFF WALES	0.8	0.3%	1	0.3%	19.5%	0.8	0.3%	1	0.3%	19.5%	19.5
WALES TOTAL	0.8	0.3%	1	0.3%	19.5%	0.8	0.3%	1	0.3%	19.5%	19.5
SMALL AIRPORTS	0.3	0.1%	0.4	0.1%	57.5%	0.3	0.1%	0.4	0.1%	57.5%	57.5
SE & E TOTAL	169.1	61.7%	201.0	61.5%	18.9%	169.1	61.7%	201.0	61.5%	18.9%	18.9
NON SE & E TOTAL	104.9	38.3%	125.9	38.5%	20.1%	104.9	38.3%	125.9	38.5%	20.1%	20.1
TOTAL UK	273.9	100.0%	326.9	100.0%	19.3%	273.9	100.0%	326.9	100.0%	19.3%	19.3

Scenario 2

AIRPORT	PASSENGERS 2023		PASSENGERS 2035		GROWTH	CARGO 2023		CARGO 2035		GROWTH	GHG EMISSIONS MtCO ₂ e
	MILLIONS	SHARE	MILLIONS	SHARE		M TONNES	SHARE	M TONNES	SHARE		
GATWICK	40.9	14.9%	55	15.4%	34.5%	0.061	3%	0.100	3%	63.6%	2.03
HEATHROW	79.1	28.9%	90	25.3%	13.7%	1.387	62%	2.000	54%	44.2%	4.21
LONDON CITY	3.4	1.3%	6	1.7%	74.9%	0.000	0%	0.000	0%	-	0.17
LUTON	16.4	6.0%	23	6.5%	40.2%	0.025	1%	0.050	1%	98.6%	0.81
MANSTON	0.0	0.0%	0.5	0.1%	-	0.000	0%	0.200	5%	-	0.00
NORWICH	0.4	0.1%	0.6	0.2%	67.6%	0.000	0%	0.000	0%	-	0.02
SOUTHAMPTON	0.8	0.3%	1.5	0.4%	98.7%	0.000	0%	0.000	0%	-	0.04
SOUTHEND	0.1	0.1%	1	0.3%	584.9%	0.000	0%	0.000	0%	-	0.01
STANSTED	28.0	10.2%	35	9.8%	25.2%	0.252	11%	0.300	8%	19.1%	1.43
SE & E TOTAL	169.1	61.7%	212.6	59.7%	25.7%	1.726	77%	2.650	72%	53.6%	8.72
BIRMINGHAM	11.5	4.2%	17	4.8%	48.1%	0.021	1%	0.050	1%	134.0%	0.57
EAST MIDLANDS	3.9	1.4%	5	1.4%	27.2%	0.353	16%	0.600	16%	70.1%	0.27
MIDLANDS TOTAL	15.4	5.6%	22	6.2%	42.8%	0.374	17%	0.650	18%	73.7%	0.84
DONCASTER SHEFFIELD	1.4	0.5%	0	0.0%	-	0.000	0%	0.000	0%	-	0.07
HUMBERSIDE	0.1	0.1%	0.2	0.1%	46.0%	0.000	0%	0.000	0%	-	0.01
LEEDS BRADFORD	4.0	1.5%	6	1.7%	50.4%	0.000	0%	0.000	0%	-	0.20
LIVERPOOL	4.2	1.5%	6	1.7%	43.1%	0.000	0%	0.000	0%	-	0.21
MANCHESTER	28.1	10.2%	35	9.8%	24.7%	0.068	3%	0.200	5%	194.9%	1.40
NEWCASTLE	4.8	1.8%	7	2.0%	45.3%	0.004	0%	0.010	0%	181.8%	0.24
TEESSIDE	0.2	0.1%	0.4	0.1%	77.0%	0.000	0%	0.000	0%	-	0.01
NORTH TOTAL	42.6	15.6%	54.2	15.2%	27.2%	0.072	3%	0.210	6%	193.0%	2.12
BELFAST CITY	2.1	0.8%	3	0.8%	41.8%	0.000	0%	0.000	0%	-	0.10
BELFAST INTERNATIONAL	6.0	2.2%	8	2.2%	34.3%	0.022	1%	0.040	1%	79.5%	0.30
CITY OF DERRY	0.2	0.1%	0.3	0.1%	94.8%	0.000	0%	0.000	0%	-	0.01
NI TOTAL	8.2	3.0%	11.3	3.2%	37.4%	0.022	1%	0.040	1%	79.4%	0.41
ABERDEEN	2.2	0.8%	4	1.1%	79.4%	0.002	0%	0.080	2%	4119.4%	0.11
EDINBURGH	14.4	5.3%	20	5.6%	38.9%	0.020	1%	0.030	1%	49.0%	0.71
GLASGOW	7.4	2.7%	12	3.4%	63.1%	0.006	0%	0.020	1%	262.6%	0.36
INVERNESS	0.8	0.3%	1.5	0.4%	87.3%	0.000	0%	0.000	0%	-	0.04
KIRKWALL	0.1	0.0%	0.2	0.1%	49.3%	0.000	0%	0.000	0%	-	0.01
PRESTWICK	0.5	0.2%	1	0.3%	90.8%	0.011	0%	0.000	0%	-	0.03
STORNOWAY	0.1	0.0%	0.2	0.1%	90.5%	0.000	0%	0.000	0%	-	0.01
SUMBURGH	0.3	0.1%	0.4	0.1%	55.0%	0.000	0%	0.000	0%	-	0.01
SCOTLAND TOTAL	25.8	9.4%	39.3	11.0%	52.3%	0.039	2%	0.130	4%	237.4%	1.28
BOURNEMOUTH	1.0	0.3%	1.5	0.4%	57.9%	0.011	1%	0.100	3%	773.9%	0.05
BRISTOL	9.9	3.6%	12	3.4%	21.1%	0.000	0%	0.000	0%	-	0.49
EXETER	0.4	0.2%	0.8	0.2%	84.8%	0.000	0%	0.000	0%	-	0.02
NEWQUAY	0.4	0.1%	0.6	0.2%	46.7%	0.000	0%	0.000	0%	-	0.02
SW TOTAL	11.7	4.3%	14.9	4.2%	27.3%	0.000	0%	0.000	0%	-	0.58
CARDIFF WALES	0.8	0.3%	1.5	0.4%	79.2%	0.000	0%	0.000	0%	-	0.04
WALES TOTAL	0.8	0.3%	1.5	0.4%	79.2%	0.000	0%	0.000	0%	-	0.04
SMALL AIRPORTS	0.3	0.1%	0.5	0.1%	96.9%	0.012	1%	0.000	0%	-	0.02
SE & E TOTAL	169.1	61.7%	212.6	59.7%	25.7%	1.726	76.9%	2.650	72.0%	53.6%	8.7
NON SE & E TOTAL	104.9	38.3%	143.7	40.3%	37.0%	0.519	23.1%	1.030	28.0%	28.0%	5.3
TOTAL UK	273.9	100.0%	356.3	100.0%	30.1%	2.244	100.0%	3.680	100.0%	64.0%	14.00

Scenario 3

AIRPORT	PASSENGERS 2023		PASSENGERS 2035		GROWTH	CARGO 2023		CARGO 2035		GROWTH	GHG EMISSIONS MtCO ₂ e
	MILLIONS	SHARE	MILLIONS	SHARE		M TONNES	SHARE	M TONNES	SHARE		
GATWICK	40.9	14.9%	58	15.1%	41.8%	0.061	3%	0.100	3%	63.6%	2.03
HEATHROW	79.1	28.9%	92	24.0%	16.2%	1.387	62%	2.000	54%	44.2%	4.21
LONDON CITY	3.4	1.3%	6	1.6%	74.9%	0.000	0%	0.000	0%	-	0.17
LUTON	16.4	6.0%	25	6.5%	52.4%	0.025	1%	0.050	1%	98.6%	0.81
MANSTON	0.0	0.0%	0.5	0.1%	-	0.000	0%	0.200	5%	-	0.00
NORWICH	0.4	0.1%	0.6	0.2%	67.6%	0.000	0%	0.000	0%	-	0.02
SOUTHAMPTON	0.8	0.3%	1.5	0.4%	98.7%	0.000	0%	0.000	0%	-	0.04
SOUTHEND	0.1	0.1%	1	0.3%	584.9%	0.000	0%	0.000	0%	-	0.01
STANSTED	28.0	10.2%	38	9.9%	36.0%	0.252	11%	0.300	8%	19.1%	1.43
SE & E TOTAL	169.1	61.7%	222.6	58.1%	31.7%	1.726	77%	2.650	72%	53.6%	8.72
BIRMINGHAM	11.5	4.2%	20	5.2%	74.2%	0.021	1%	0.050	1%	134.0%	0.57
EAST MIDLANDS	3.9	1.4%	6	1.6%	52.6%	0.353	16%	0.600	16%	70.1%	0.27
MIDLANDS TOTAL	15.4	5.6%	26	6.8%	68.7%	0.374	17%	0.650	18%	73.7%	0.84
DONCASTER SHEFFIELD	1.4	0.5%	2	0.5%	42.0%	0.000	0%	0.000	0%	-	0.07
HUMBERSIDE	0.1	0.1%	0.2	0.1%	46.0%	0.000	0%	0.000	0%	-	0.01
LEEDS BRADFORD	4.0	1.5%	7	1.8%	75.5%	0.000	0%	0.000	0%	-	0.20
LIVERPOOL	4.2	1.5%	8	2.1%	90.8%	0.000	0%	0.000	0%	-	0.21
MANCHESTER	28.1	10.2%	38	9.9%	35.3%	0.068	3%	0.200	5%	194.9%	1.40
NEWCASTLE	4.8	1.8%	9	2.3%	86.8%	0.004	0%	0.010	0%	181.8%	0.24
TEESSIDE	0.2	0.1%	0.4	0.1%	77.0%	0.000	0%	0.000	0%	-	0.01
NORTH TOTAL	42.6	15.6%	64.2	16.7%	50.6%	0.072	3%	0.210	6%	193.0%	2.12
BELFAST CITY	2.1	0.8%	3	0.8%	41.8%	0.000	0%	0.000	0%	-	0.10
BELFAST INTERNATIONAL	6.0	2.2%	9	2.3%	51.1%	0.022	1%	0.040	1%	79.5%	0.30
CITY OF DERRY	0.2	0.1%	0.3	0.1%	94.8%	0.000	0%	0.000	0%	-	0.01
NI TOTAL	8.2	3.0%	12.3	3.2%	49.5%	0.022	1%	0.040	1%	79.4%	0.41
ABERDEEN	2.2	0.8%	4	1.0%	79.4%	0.002	0%	0.080	2%	4119.4%	0.11
EDINBURGH	14.4	5.3%	21	5.5%	45.9%	0.020	1%	0.030	1%	49.0%	0.71
GLASGOW	7.4	2.7%	12	3.1%	63.1%	0.006	0%	0.020	1%	262.6%	0.36
INVERNESS	0.8	0.3%	1.5	0.4%	87.3%	0.000	0%	0.000	0%	-	0.04
KIRKWALL	0.1	0.0%	0.2	0.1%	49.3%	0.000	0%	0.000	0%	-	0.01
PRESTWICK	0.5	0.2%	1	0.3%	90.8%	0.011	0%	0.000	0%	-	0.03
STORNOWAY	0.1	0.0%	0.2	0.1%	90.5%	0.000	0%	0.000	0%	-	0.01
SUMBURGH	0.3	0.1%	0.4	0.1%	55.0%	0.000	0%	0.000	0%	-	0.01
SCOTLAND TOTAL	25.8	9.4%	40.3	10.5%	56.2%	0.039	2%	0.130	4%	237.4%	1.28
BOURNEMOUTH	1.0	0.3%	2	0.5%	110.5%	0.011	1%	0.100	3%	773.9%	0.05
BRISTOL	9.9	3.6%	12	3.1%	21.1%	0.000	0%	0.000	0%	-	0.49
EXETER	0.4	0.2%	0.8	0.2%	84.8%	0.000	0%	0.000	0%	-	0.02
NEWQUAY	0.4	0.1%	0.6	0.2%	46.7%	0.000	0%	0.000	0%	-	0.02
SW TOTAL	11.7	4.3%	15.4	4.0%	31.6%	0.000	0%	0.000	0%	-	0.58
CARDIFF WALES	0.8	0.3%	2	0.5%	138.9%	0.000	0%	0.000	0%	-	0.04
WALES TOTAL	0.8	0.3%	2	0.5%	138.9%	0.000	0%	0.000	0%	-	0.04
SMALL AIRPORTS	0.3	0.1%	0.5	0.1%	96.9%	0.012	1%	0.000	0%	-	0.02
SE & E TOTAL	169.1	61.7%	222.6	58.1%	31.7%	1.726	76.9%	2.650	72.0%	53.6%	8.7
NON SE & E TOTAL	104.9	38.3%	160.7	41.9%	53.3%	0.519	23.1%	1.030	28.0%	28.0%	5.3
TOTAL UK	273.9	100.0%	383.3	100.0%	39.9%	2.244	100.0%	3.680	100.0%	64.0%	14.00

Contact

The Chartered Institute of Logistics and Transport UK (CILT) provides insight into pivotal decisions and policies. Our recommendations emanate from the extensive collective knowledge and expertise of industry experts from CILT's members and focus on delivering prosperity for the United Kingdom. We invite you to engage with us and use this expertise to unlock sustainable growth, reshape our transport infrastructure for heightened efficiency and explore the transformative potential of transport and logistics.

If you have any comments on what you have read, please contact:

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