

REVIEWING PRIORITY POLICY AREAS FOR SASIG



15th October 2025

ITEM 5: DISCUSSION TO IDENTIFY SASIG PRIORITY ISSUES

- **Aviation noise policy** - Latest position, metrics to be used, night noise, health impacts, mitigation and compensation.
- **Aviation noise and land use planning** - New planning regulations, airspace change process, balanced approach, Noise Action Plans, PPG 24 replacement, safeguarding, planning fees, access to expert advice.
- **Allocation of future capacity between London and Regional Airports** – Demand led, rebalancing regional preference, Fly local.
- **Future capacity enhancements/constraints in the London TMA** - Strategic approach, hub role and Aviation National Policy Statement.
- **UK air freight policy** - importance to exports and growth sectors, no strategy, capacity crunch driving traffic overseas, more trucking, regions missing out.
- **Regional airports & connectivity** - access to air services, hub connections, CO2 assessments - air v other modes, implications of UK ETS.
- **How does aviation impact LAs** - need to better understand scope & implications, positive & negative.
- **Maximising wider economic benefits** – Jobs, time savings, innovation/business and logistics clusters, supply chains, trade and tourism, inward investment. Need to quantify, local insight.
- **Minimising environmental impacts associated with growth** - mitigating those that remain, especially CO2
- **Airport surface access** - ASAS, mode split, kiss & ride, drop-off/parking prices, fly parking, PT options, catchment access
- **Airspace Modernisation** – UKADS, ACOG Masterplans, Airspace change process
- **Advanced Air Mobility** - Drones, e-VTOL, vertiports, LA user cases.
- **Implications of new technologies** - influence on aviation policy; provision ensure they are realised.
- **Ownership and Funding Options** - Public/Private, Equity/loans, gain-share, prosperity funds
- **Supporting Essential Infrastructure** – Electricity, water, surface drainage, solar/CH&P, SAF supply, hydrogen

SASIG AIRPORT NOISE ROUNDTABLE – PROPOSED SCOPE, TIMING, SPEAKERS



15th October 2025

WHY HIGHLIGHT NOISE POLICY?

- Government's approach to de-carbonisation of aviation is set; delivery is now the priority; it is also a less important environmental issue for many airport authorities after noise
- Noise is an area of aviation policy which is fluid; major research underway and relationship between noise and land use planning is in train
- SASIG is an active member of ANEG – views are respected
- With a new Minister and several areas of policy coming to a head there is an opportunity to influence the future direction policy

WHICH AREAS OF NOISE POLICY ARE OF GREATEST INTEREST TO SASIG MEMBERS?

- Night Noise
- ICAO Balanced Approach
- New Technologies
- Airport Noise and Land Use
- Airspace Change
- Noise Action Plans
- Health Impacts
- BSI Standards
- Compensation Measures

Research

- ANNE (Aviation Night Noise Effects) Study:
This research study is about the impact of aviation noise at night on sleep and annoyance
- ANAS (Aviation Noise Attitudes Survey):
Large-scale social **research study** examining the relationship between long-term exposure to aviation noise and annoyance in the UK.
- Night Noise – Economic Benefits Research

COMMENTS ARE INVITED

PROPOSALS FOR ROUNDTABLE

- Partner with LGA
- Opportunity to invite none members to taster
- Speakers – DfT, MHCLG, DEFRA, CAA, NGOs, Heathrow, Gatwick
- Online , in-person or Hybrid?
- Duration? Half day or two hours?
- Date – Late Jan or early February 2026

AIRPORT CAPACITY PRESENTATION



15th October 2025

LOOKING TO THE FUTURE – UK AIRPORT CAPACITY

- With most of the UK's larger airports at or above pre-Covid passenger volumes and the Government signaling its support for Airport growth there has been a surge in the preparation of airport masterplans and applications.
- Making best use policy has been used to support:
 - the recent planning approvals for expansion at Stansted, London City and Bristol
 - DCO's for Luton, Gatwick and Manston
- In July HAL and Aurora submitted proposals to Government for a Third Runway at Heathrow. The airport has materially exceeded its pre-COVID passenger volumes; but support is dependent on environmental sustainability (CO2, Noise, Air Quality) and nationwide benefit
- The Climate Change Committee's scepticism about the ability of new technology to reduce aviation's carbon emissions, the need for new airspace design, noise mitigation, decarbonization and costs are all major challenges.
- What is needed for the benefits to be felt across the UK? Are there other strategic approaches that offer better outcomes for the rest of the UK.

GATWICK WITH DCO RUNWAY



PROJECTED GROWTH TO 2060

		UK Total
Year	CAGR (%)	MPPA
2024	2.50%	292.5
2030	2.00%	339.2
2035	1.50%	374.5
2040	1.00%	403.5
2045	0.075%	424.0
2050	0.050%	440.2
2055	0.050%	451.3
2060		462.7

- Even conservative CAGRs suggest total UK traffic will pass 400mppa in 2040
- Assuming the growth curve asymptotes, 2050 volumes will reach 440mppa and 2060 462mppa
- Climate Change Committee view is that exceeding 400mppa is incompatible with Net Zero

HEATHROW WITH RUNWAY 3



FUTURE CAPACITY SCENARIOS FOR LONDON AIRPORTS

Scenario		Heathrow	Gatwick	Stansted	Luton	London City	Southend	London Total
		mppa	mppa	mppa	mppa	mppa	mppa	mppa
Current Capacity		85.00	47.00	30.00	19.00	7.00	2.00	190.00
With Existing Approvals		95.00	63.00	43.00	32.00	9.00	3.00	245.00
Regional Preference		100.00	65.00	43.00	32.00	10.00	5.00	255.00
With R3 Heathrow		130.00	63.00	43.00	32.00	9.00	3.00	280.00
SE Aspirational		130.00	70.00	50.00	32.00	13.00	10.00	305.00
With R2 at STN		130.00	63.00	85.00	32.00	10.00	5.00	325.00

FUTURE CAPACITY SCENARIOS AT UK REGIONAL AIRPORTS

Scenario	Manchester mppa	Birmingham mppa	Edinburgh mppa	Glasgow mppa	Belfast mppa	Other mppa	Regional Total mppa		UK Total mppa	London %age	Regional %age
Current Capacity	30.80	12.85	15.80	8.05	6.75	30.75	105.00		295.00	64.41	35.59
With Existing Approvals	45.00	22.00	20.00	15.00	8.00	45.00	155.00		400.00	61.25	38.75
Regional Preference	55.00	40.00	30.00	20.00	10.00	55.00	210.00		465.00	54.84	45.16
With R3 Heathrow	50.00	22.00	25.00	16.00	12.00	55.00	180.00		460.00	60.87	39.13
SE Aspirational	45.00	22.00	20.00	15.00	8.00	45.00	155.00		460.00	66.30	33.70
With R2 at STN	45.00	22.00	20.00	15.00	8.00	45.00	155.00		480.00	67.71	32.29

PROSPECTIVE AIR FREIGHT CONSTRAINTS

- In 2024 freight volumes had recovered to within 100,000T of their pre-COVID peak: 2.549MT vs 2.646MT in 2018
- Air Freight CAGRs typically exceed GDP by 1%; even assuming a conservative 0.75%, growth is expected to be c3% over the next 5-10 years (due to e-commerce growing at 6-8%pa), declining thereafter to less than 2% by 2050
- Projected UK demand for airfreight will therefore reach 4.5MT in 2050; available capacity is closer to 3mppa, but that includes 0.5MT being trucked cross channel
- London and South East faces significant capacity constraints for freighter operations – No slots at LHR (TDRs), STN wants to displace freighter operations, Luton will too and LGW does not take freighters
- East Midlands has capacity but will itself run out in 10 years time
- Airfreight carries 40% of UK exports by value and supports many of the fastest growing and highest value sectors in the Modern Industrial Strategy
- A capacity crisis is imminent but there is no Air Freight Strategy and Government complacency about whether one is needed.

SOME KEY POLICY QUESTIONS FOR SASIG

- What should be the approach to London/Regional market shares and roles?
- Are the scenarios suggested realistic; are there any others that should be considered?
- Economic implications of the scenarios – impacts at a national and local/regional level
- Compatibility of options with environmental objectives and nation wide mission
- Extent to which Government should intervene in the future direction of development in the sector and with what objectives
- Implications for LAs
- The role of LAs in influencing and delivering/opposing national policy

HOW SHOULD SASIG TAKE FORWARD THIS AGENDA

- Pro-active or re-active approach?
- Research and publish a policy paper on preferred approach or react to consultations
- Rely on a statement of principles
- Partner with others – who? Engage with industry?
- Target which influencers and decision-makers?
- Scope of work, timing and approach