

# MASTER PLAN 2040

BELFAST CITY AIRPORT

*Investing in Northern Ireland's  
Connectivity and Prosperity*

**BELFAST  
CITY  
AIRPORT**

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**OUR VISION WILL:**  
**ENHANCE**  
**NORTHERN**  
**IRELAND'S AIR**  
**CONNECTIVITY**

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**UNLOCK**  
**INVESTMENT IN**  
**LOCAL INFRASTRUCTURE**

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**INCREASE**  
**ECONOMIC GROWTH**  
**AND PROSPERITY IN**  
**A SUSTAINABLE WAY**

# Foreword

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I've had the privilege of being in post at Belfast City Airport for over four years now and the overriding impression I have is the sense of ambition and growth potential that this place has – it's palpable.

The Programme for Government has set us on an exciting course to realise this ambition and at Belfast City Airport we are ready to play our part. We consider ourselves a vital link and first impression for anyone visiting the region, whether for tourism, business or visiting friends and relatives.

**As a key infrastructure asset, we are steadfast in our commitment to ensuring that Northern Ireland retains its connectivity and we continue to be a vital economic enabler.**

Economic growth won't happen on its own however, and the critical enablers such as utility provision, infrastructure and, vitally given our island status, connectivity, cannot be assumed.

UK Government guidance encourages all airports to have an up-to-date Master Plan. At Belfast City Airport, our last Master Plan was produced in 2006, so it is timely to update our thinking.

In order to understand what we would need to consider in this Master Plan, we commissioned a demand forecast for the next 15 years to 2040 . This analysis was carried out by the same experts that the Department for the Economy used for its aviation strategy assessment. Given our island location, good connectivity to the rest of the UK and the EU is especially important and the forecast predicts that the need for air connectivity across the island of Ireland will double over the Master Plan period.

Road and rail transport across the sea just aren't feasible and, as such, we must take proactive steps to meet this future air travel demand. Today the capacity is not available to satisfy the forecast level of passenger growth, and we therefore recommend that all airports, not just Belfast City, consider how to play their part in delivering it. Undoubtedly a collective effort across the Irish and Northern Irish airport sectors will be required.

This Master Plan outlines how Belfast City will continue to play the same role we play today, but in a much bigger market. As the majority of passenger demand from Northern Ireland is to the rest of the UK today, it will remain so in 2040.

During the Master Plan period, international demand will be the fastest growing sector, and there will be a need for additional routes to key European cities for both business and leisure.

As we grow, there is also an opportunity for Northern Ireland airports to better serve Northern Ireland's own air travel demand. Today, more passengers travel to and from Northern Ireland via Dublin Airport than via Belfast City Airport.

**Our vision is to deliver growth to 7 million passengers annually in a sustainable and responsible way.**

This growth will be achieved without any change to our existing noise contour limit by introducing more cleaner, quieter, new generation aircraft.

Realising this vision will unlock private potential investment of up to £200m that will enable the airport to continue to positively contribute to improved connectivity, regional balance and economic growth. It will also facilitate more job creation, community outreach projects and sustainability initiatives. All on a much larger scale.

**This Master Plan also offers the opportunity to partner with Translink to further explore the real prospect of Belfast City becoming the first airport on the island of Ireland to be directly connected by rail.**

This pioneering approach will help secure transformational change for public transport and aligns closely with Government policy.

The future for Northern Ireland is rightly ambitious and it's vital that we constructively address the need for improved connectivity to enable this potential to be realised. We can't simply assume this will happen. Northern Ireland has a choice: to seize this opportunity to build a brighter, better connected future or to allow constraints to limit what we can achieve.

Developing our vision for the Belfast City Airport of tomorrow has been incredibly exciting and this Master Plan outlines how we can cater for the demand that Belfast City needs to serve, deliver an infrastructure asset that will be world class, and complement all the fine attributes Northern Ireland offers.

**We were delighted with the level of engagement in our consultation exercise in autumn 2025, as well as the strong levels of support from our local community, elected representatives, businesses, passengers, trade bodies and airlines. We know how important it is that we deliver this growth sensitively and will continue to work with everyone in the interests of Northern Ireland.**

*Matthew Hall*

Chief Executive, Belfast City Airport



# Executive Summary

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## INTRODUCTION

Belfast City Airport is located within the Belfast Harbour Estate at the heart of the city and plays a critical role in the economy of Belfast and Northern Ireland.

We last produced a Master Plan in 2006. Much has changed since then. This new Master Plan sets out how we need to respond to the predicted growth in passenger demand across the island of Ireland and how we can continue to play a vital role in contributing to the Northern Ireland economy over the next 15 years.

The Master Plan includes information on passenger forecasts, the physical and operational changes necessary to accommodate growth, an assessment of the potential effects of growth, and details of how we are working to lessen our impact on the environment and continue to support our local community.

## BELFAST CITY AIRPORT TODAY

The airport today connects Northern Ireland to the rest of the UK and Europe on 23 routes, including to major hubs such as London Heathrow and Amsterdam's Schiphol, which provide access to global destinations. Over 90% of our passengers travel back and forth to the rest of the UK compared to an average of 70% across Northern Ireland. In order to meet demand, the airport will need to add new routes, particularly to key European cities.

Our catchment is the whole of Northern Ireland, with 8% of passengers also coming from the closest parts of the Republic of Ireland. At the same time, around 27% of travellers to and from Northern Ireland choose to use Dublin Airport; by broadening the range of destinations, we can secure more of our home market.

Northern Ireland is physically separated from the rest of the UK and air travel plays a vital role in connecting us. Similarly, air travel is our only way to stay connected to Europe and the wider world. Around 78% of all Northern Ireland passengers that connect via another airport fly from Belfast City.

Tourism arrivals more than doubled in Northern Ireland between 2011 and 2024 and we played a vital role in facilitating this growth. We also have the third highest proportion of business travellers of any airport in the UK.

The airport is already a significant contributor to the Northern Ireland economy, generating over £800m Gross Value Added (GVA) annually and supporting over 12,000 jobs in the region. In addition to the economics, we play an important and growing role in the community. We are particularly proud of our award-winning IGNITE programme and our Autism in the Air programme, both of which are unique to Belfast City.

The airport's operations are currently controlled by a Planning Agreement with the Northern Ireland Department for Infrastructure (DfI), which includes restrictions on the extent of the noise that can be generated, the number of Air Transport Movements (ATMs) and the hours of operation.

# THE HEART OF *Belfast*



# Executive Summary

By 2040 the Master Plan will enable:



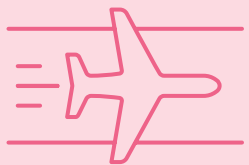
## DELIVERY

of Programme for  
Government



## ENHANCED AIR CONNECTIVITY

for Belfast and  
Northern Ireland



## £200m INVESTMENT

to be potentially  
unlocked

### MEETING PASSENGER DEMAND

The market for air travel to and from the island of Ireland is forecast to double from just over 45 million passengers in 2024 to over 90 million passengers by 2040.

Northern Ireland's airports will need to handle around 21 million of these journeys and Belfast City will be critical to meeting this need. It is forecast that Belfast City will reach 7 million passengers per annum (mppa) over the Master Plan period.

While domestic UK travel will still account for over 60% of our business by 2040, most growth will come from improved connections to global cities and European hubs as well as leisure destinations. To meet this demand, more airlines will need to base more aircraft at Belfast City.

The required growth at Belfast City will support the Northern Ireland Executive's Programme for Government, including supporting a high performing, competitive economy, tackling disadvantage, promoting inclusion and delivering on climate change.

It also aligns with UK aviation policy which encourages airports to have a Master Plan and strongly supports them to make best use of their existing runways. While there is no existing aviation strategy for Northern Ireland, we understand that the Department for the Economy (DfE) is currently preparing one. We anticipate that our future plans will be fully considered as that exercise progresses.

# THE HEART OF *Belfast*



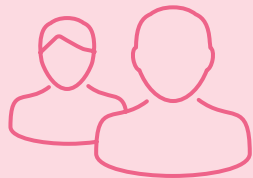
# Executive Summary

By 2040 the Master Plan will deliver the following for Northern Ireland:



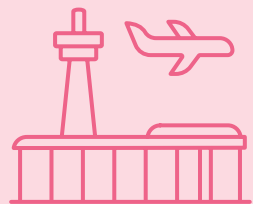
## £1.7bn

in economic contribution annually



## 23,000+

jobs supported across the region



## 1,100+

new jobs created at the airport

## BENEFITS OF THE MASTER PLAN

The economic benefits from the delivery of our Master Plan will be substantial. By 2040 the increase to 7mppa would generate £1.7 billion in GVA for Northern Ireland and support over 23,000 jobs, including over 1,100 new roles at the airport campus.

As well as the economic benefits, our approach to growth at the airport will help deliver improved access to employment and training opportunities for those furthest from the labour market.

## MASTER PLAN 2040 – OUR VISION

The main changes to the physical infrastructure at the airport required to accommodate the forecast passenger growth include extending the terminal, adding new aircraft stands, extending the apron and taxiways, improving surface access facilities, and reducing the proportion of people using private cars to access the airport. There are also opportunities to provide complementary developments to support growth, including a new hotel and retail forecourt with increased provision of charging facilities for electric vehicles.

To support these infrastructure enhancements, it is likely that upgrades to the existing airport access, parking and forecourt facilities will also be required.

It is important to drive modal shift to more sustainable transport as part of any growth. We will work with Translink to deliver improved bus facilities and cap parking levels to encourage more use of public transport.

With the ambition of transformational change, we are also partnering with Translink to further explore the opportunity for a new rail halt directly serving the extended terminal. This would see Belfast City become the first airport on the

island to have a direct rail connection and build on the recently published feasibility study that confirmed it is possible. It would also significantly improve how people get to and from the airport with quicker and more sustainable journeys to and from Belfast city centre.

While passenger numbers will grow from 2.4mppa to 7mppa over the next 15 years, the rate of growth in annual ATMs will be less pronounced (growing from around 31,000 to around 61,000). This is mainly due to increased use of cleaner, quieter new generation aircraft that also have more seats than older aircraft types. The current annual ATM limit is set at 48,000 and, while we were fast approaching it prior to the Covid-19 pandemic, we predict that it will now be reached in the early 2030s. The ATM limit will need to be adjusted to allow for the Master Plan delivery.

Scheduled flights are currently permitted between 06:30 and 21:30. Between 21:31 and 23:59 delayed flights can land or take off in exceptional circumstances. We are exploring adjustments to our operating hours to allow for some additional scheduled flights beyond the current 15-hour daily limit. This could, for example, allow some scheduled movements beyond 21:30 for a set duration, but within the existing shoulder period for delays to 23:59.

Improved flexibility will allow airlines to more effectively serve demand, allowing passengers to choose flights that best meet their requirements and to complete their journeys with minimal disruption. It would also avoid the need to divert to other airports thus reducing costs to airlines and passengers, reducing cancellations and ensuring that aircraft are correctly positioned for flights the next day.

Should there be any future detailed proposals for additional flexibility beyond 21:30, a detailed assessment of noise impacts would be carried out and fully consulted upon as part of that process.

The airport would also bring forward measures to protect our local community, including:

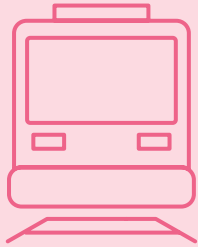
- ✈ targeted improvements to our existing Noise Insulation Scheme aligned with relevant policy and industry benchmarks; and
- ✈ accelerating the transition to quieter, new generation aircraft by incentivising airlines to operate these aircraft types (or turboprops) on any scheduled movements beyond 21:30.

**We do not anticipate any future flights, either scheduled or delayed, beyond the current 23:59 limit, nor do we anticipate any flights prior to the existing start time of 06:30.**

**We do not anticipate that any runway extension would be required to reach 7mppa either.**

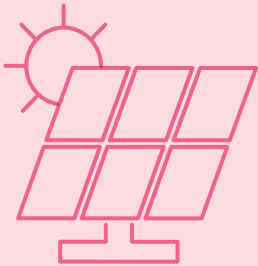
# Executive Summary

The Master Plan presents opportunities to:



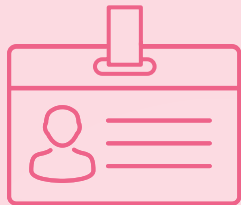
## TRANSFORM PUBLIC TRANSPORT

and provide new rail halt



## ACCELERATE SUSTAINABILITY AMBITIONS

including net zero and onsite renewables



## DELIVER EMPLOYMENT ACADEMY

with more apprenticeships

### SUSTAINABILITY AT THE HEART OF OUR MASTER PLAN

We recently published a new Sustainability Strategy. Progress has already been made and this Master Plan will allow us to further improve our performance, including the potential to meet our net zero target for airport operations up to 10 years earlier than previously planned. We will also take the opportunity to increase onsite renewables and work with our industry partners to support the future decarbonisation of flight.



## ENVIRONMENTAL CONSIDERATIONS

The Preliminary Environment Report (PER) that is published alongside this Master Plan covers a wide range of topics. The Master Plan focuses on the main environmental considerations, including noise impacts.

### **The move to new generation aircraft means that all forecast growth can be accommodated within our existing noise contour area limit.**

Current operations mean air pollutants are well within UK government expectations and with improvements to our operations (such as the introduction of electric power to aircraft from all our stands), and changes to the type of vehicles using our roads, any increase in concentrations will be very small and will remain well below any limits.

We are committed to reducing the carbon emissions from our own operations by 2040 (we have already achieved a 44% reduction since 2019). For emissions from flights, UK policy is clear that it should be considered at a national level and the UK's Jet Zero Strategy is aimed at delivery of net zero for air travel by 2050, without limiting passenger growth.

## IMPLICATIONS OF FAILING TO MEET DEMAND

If Belfast City is not able to meet growth in passenger demand, there will be constraints on Northern Ireland's ability to improve its domestic and international air connectivity to support economic growth whilst keeping fares low.

This would frustrate ambitions to improve economic productivity, increase foreign direct investment, increase tourism and create more jobs through activity at the airport.



# Executive Summary

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## CONSULTATION & ENGAGEMENT

In developing this Master Plan, Belfast City Airport undertook a comprehensive consultation and engagement exercise that sought feedback from stakeholders including our local community, elected representatives, businesses, passengers, trade bodies and airlines. We are extremely pleased with the level of engagement and feedback received from all stakeholders during the consultation process.

Overall, the responses to the consultation offered very supportive and positive views on the Master Plan vision to 2040.

A Consultation Report has been published alongside this Master Plan to provide a comprehensive overview of the process and feedback received.

The report can be accessed via the QR code.

Some of the key findings are summarised below:

- ✈️ 72% of the 376 responses received from the public stated support for the Master Plan vision to 2040; and
- ✈️ 95% of the 619 passengers surveyed stated their support for the Master Plan vision to 2040.
- ✈️ 23% of the public did not support the vision, with some common themes including:
  - potential scheduling of aircraft movements beyond 21:30
  - impacts of additional flights beyond current limits
  - airport expansion goes against environmental priorities and sustainability commitments.

The feedback received during the consultation period has been carefully considered in finalising this Master Plan.

In line with Government guidance, the Master Plan outlines a long-term blueprint for growth and is intended to be indicative and subject to future review.

Any detailed plans that may come forward during the Master Plan period to 2040 will be subject to further detailed design and assessment and may differ from the illustrative plans shown in this document.





AIRPORT

BELFAST CITY AIRPORT

BELFAST AIRPORT

BELFAST CITY AIRPORT

DRAFT MASTER PLAN 2040

BELFAST CITY AIRPORT

*Investing in Northern Ireland's Connectivity and Prosperity*

BELFAST AIRPORT

# Supporting our Master Plan



## Gerry Lennon

**CEO, Visit Belfast**

Tourism plays a pivotal role in driving Belfast's economy, serving as the lifeblood of our vibrant city. Ensuring robust air connectivity is not just vital, it is foundational to the sustained growth of our business and leisure visitor economy, as well as its competitive resilience. Continued investment in the city region's transport infrastructure is key to delivering Visit Belfast's vision to foster a more sustainable tourism sector that enriches visitor experiences while minimising its environmental footprint.



## Kieran Donoghue

**CEO, Invest NI**

Belfast City Airport is a key economic enabler and a vital gateway, supporting the drive for greater FDI, export growth and helping us achieve our strategic priorities at Invest NI for the benefit of the local economy. This Master Plan sets out how the airport will meet future demand integral to boosting investment, innovation and regional balance.



## Clare Guinness

**CEO, Belfast Chamber**

The delivery of the ambition outlined in this Master Plan will serve as a catalyst, accelerating economic growth, boosting jobs, attracting investment, and strengthening Belfast's position as a connected, competitive city.

The contribution that Belfast City Airport makes to local business, tourism and the community is significant. Connectivity is critical to Belfast's economic success and the airport is a strategic economic asset that our members and wider society rely on as a lifeline for commerce and business. Belfast is a city on the rise and that requires Belfast City Airport to be ready to help us unlock our future potential in the next decade and beyond.



# 1

## INTRODUCTION

### *Purpose and Context of The Master Plan*

#### **OUR PREVIOUS MASTER PLAN – 2006**

Airports are critical to the whole UK economy and vital to Northern Ireland. In view of their significance and in line with Aviation Policy, the UK Government has encouraged all airports to prepare and consult on a Master Plan which sets out their long-term intentions by identifying how they intend to respond to future passenger growth.

Our latest Master Plan is a follow-up to our previous 2006 publication<sup>1</sup> which outlined development aspirations up to 2030. In the time that has passed since our 2006 Master Plan, passenger demand, airlines and aircraft have changed significantly. Now is the time for a new vision that reflects the business we are today and the economy and region we serve, and to plan how the airport should grow to meet increasing passenger demand and a growing Northern Irish economy over the next 15 years.

## WHAT IS THE PURPOSE OF THIS MASTER PLAN?

This Master Plan outlines how Belfast City Airport needs to grow sustainably and responsibly to meet increasing passenger demand up to 2040. It provides all stakeholders with an outline of our future blueprint for growth and will inform future plan making exercises, decision making, investment and community engagement.

This document explains the projected growth in demand to fly from across the island of Ireland and how Belfast City Airport will play its part in meeting that demand. It then outlines how the airport can meet aviation forecasts while balancing operational, environmental, and community considerations. Plans are shown of the physical

infrastructure and operational changes that will be necessary to continue to meet demand to 2040. These are presented alongside an assessment of the potential environmental effects which may occur, and how these would be carefully managed to minimise any impacts on the local community and natural environment.

The Master Plan is supported by a Preliminary Environment Report (PER) which provides more information on the environmental effects arising from the proposals as well as how we would mitigate them. Both documents have been prepared with input from technical experts and based on current legislative and policy requirements.



# Our Journey So Far

**Located just five minutes from Belfast city centre, Belfast City Airport has long served as a strategic gateway for Northern Ireland — providing vital connectivity, supporting economic growth, and linking the region to key domestic and international destinations.**

The airport has a long history; it started life as Sydenham Airport, a military base, and played an important role in the Second World War before becoming established as an important asset in Northern Ireland's defence and aerospace industries. For much of the post war period it supported the operations of Shorts; one of Northern Ireland's most important businesses at the time.

In 1983, the transformation into the passenger hub we have today began as Belfast Harbour Airport when it started scheduled passenger services whilst continuing to support Shorts' aerospace operations.

Following rapid growth into a regional hub, the airport we know today took shape with the opening of a new terminal in 2001 – replacing the original 1980s facilities and supporting the ongoing growth in passenger demand.

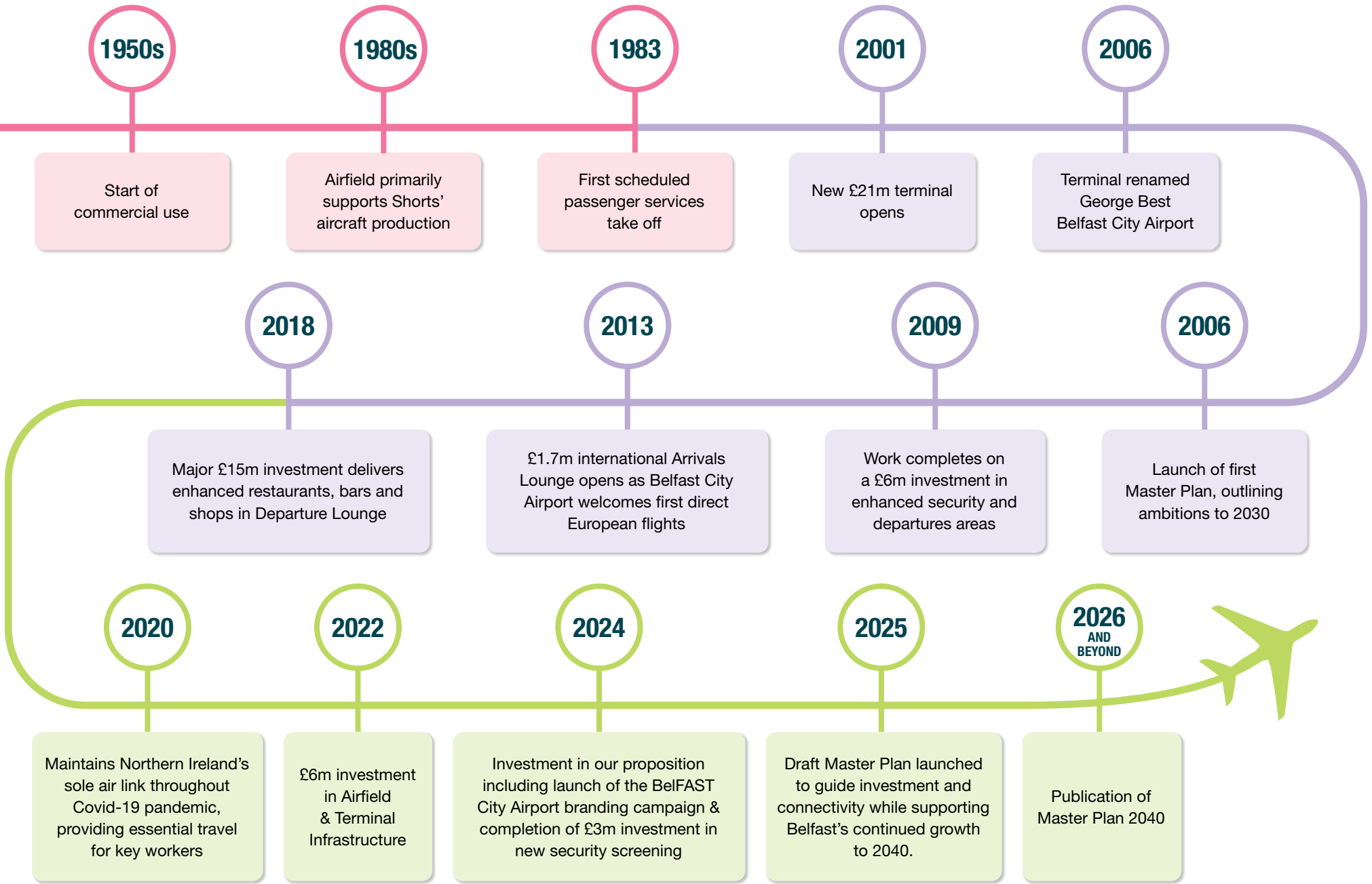
Today, Belfast City is the most punctual of all airports across the UK. By linking the city and region to key destinations across the rest of the UK and Europe, the airport plays a vital role in enabling the growth of business, tourism, and trade.

Our Master Plan is the opportunity to show how we can build on our rich history while setting out a clear blueprint for how we can continue to meet increasing passenger demand over the next 15 years.

1938

Sydenham Airport opens as a military airfield





# Our Location at the Heart of Belfast

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Belfast and Northern Ireland are growing and our links to the rest of the UK and Europe are critical to this. Belfast has delivered an incredible social and economic recovery over the last two decades.

The improved political climate has created the opportunity to develop a broader based economy, in addition to the traditional industrial and manufacturing profile.

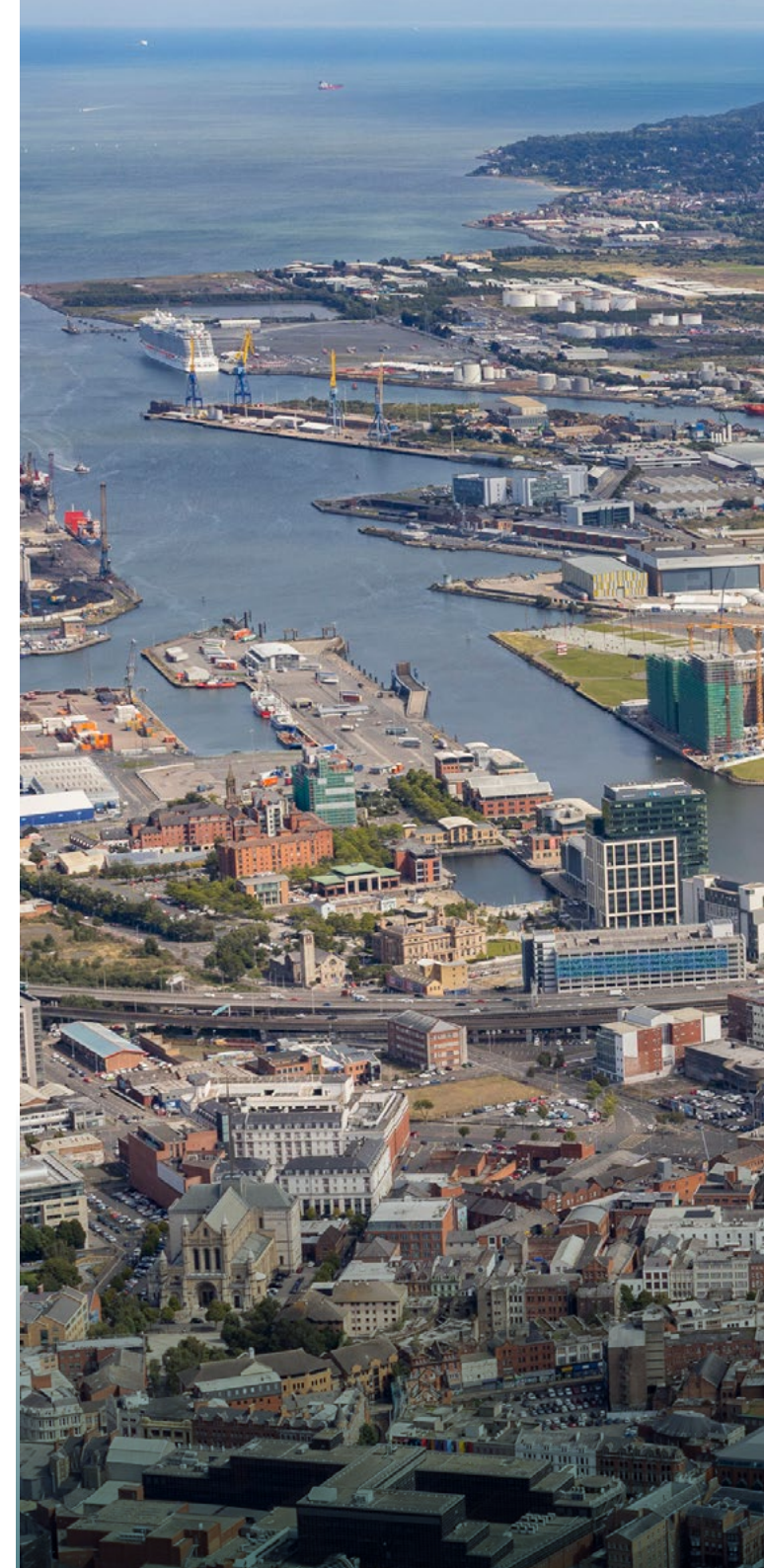
The airport is located within Belfast Harbour Estate, which provides essential maritime access to Britain, Europe and the rest of the world.

**The port and airport combined create a gateway location that provides a critical economic function for Northern Ireland, facilitating the movement of goods and people for both business and leisure by sea and air.**

The Harbour Estate is also home to the Northern Ireland Science Park and North Foreshore developments both of which offer employment in the clean-tech and high-tech sectors.

The airport is also surrounded by a range of major regeneration areas with a mix of land uses, including Sydenham Business Estate (office/industrial), Titanic Quarter (mixed-use) and City Quays (mixed-use).

In the wider city, a host of multinational companies spanning FinTech, Software Development, Professional Services, Legal, and Film Production sectors have established a presence.



## Technology

Belfast is one of the Top 10 Tech Cities in the UK.



## Conference and Performance

Belfast is home to a diverse mix of modern conference facilities and historic performance venues that cater to a wide range of events.

## Creative Industry

From major TV and film productions to augmented reality, Belfast's creative industry is making its mark globally.



## Top 10 Friendliest Cities

Voted one of the top 10 friendliest cities in the UK (Condé Nast Traveller Readers' Choice 2024).

## Skilled Workforce

As one of the youngest cities in Europe, Belfast is brimming with a highly skilled, experienced workforce.



## Research

Belfast is the second fastest growing knowledge economy in the UK and home to globally recognised research centres.

# Current Airport Site

Belfast City Airport enjoys a prominent and strategic location just three miles north-east of Belfast city centre. Bounded by the Sydenham Bypass, we have direct access via a major dual carriageway to the wider motorway network of Northern Ireland.

Belfast City Airport can also be accessed by:

- **Airport Taxi** – operating from the airport taxi rank outside the terminal building.
- **Train** – Translink operates a rail service from Bangor to Belfast which stops at Sydenham halt. The halt is a 1.2km walk from the terminal and has a sub-optimal operating schedule.
- **Bus** – the Airport Express 600 operates every 20 minutes at peak times from outside the terminal to Grand Central Station in Belfast city centre.

The airport is on a 121-hectare site, which is reclaimed land within the wider Belfast Harbour Estate. Key components of the airport include:



**1,829 metre runway**  
in a south-west to north-east orientation



**Taxi rank**



**13 aircraft stands**  
10 are connected directly to the terminal via a passenger pier, with 3 overflow stands for remote parking of aircraft



**Aviation fuel storage facility**



**15,000m<sup>2</sup> terminal building**  
facilitating a range of services including baggage handling, security, food & drink outlets and airline and car hire service desks



**Combined air traffic control tower and fire station facility**



**Car parking**  
including short stay, long stay and premium products



**Warehousing**  
within former terminal building



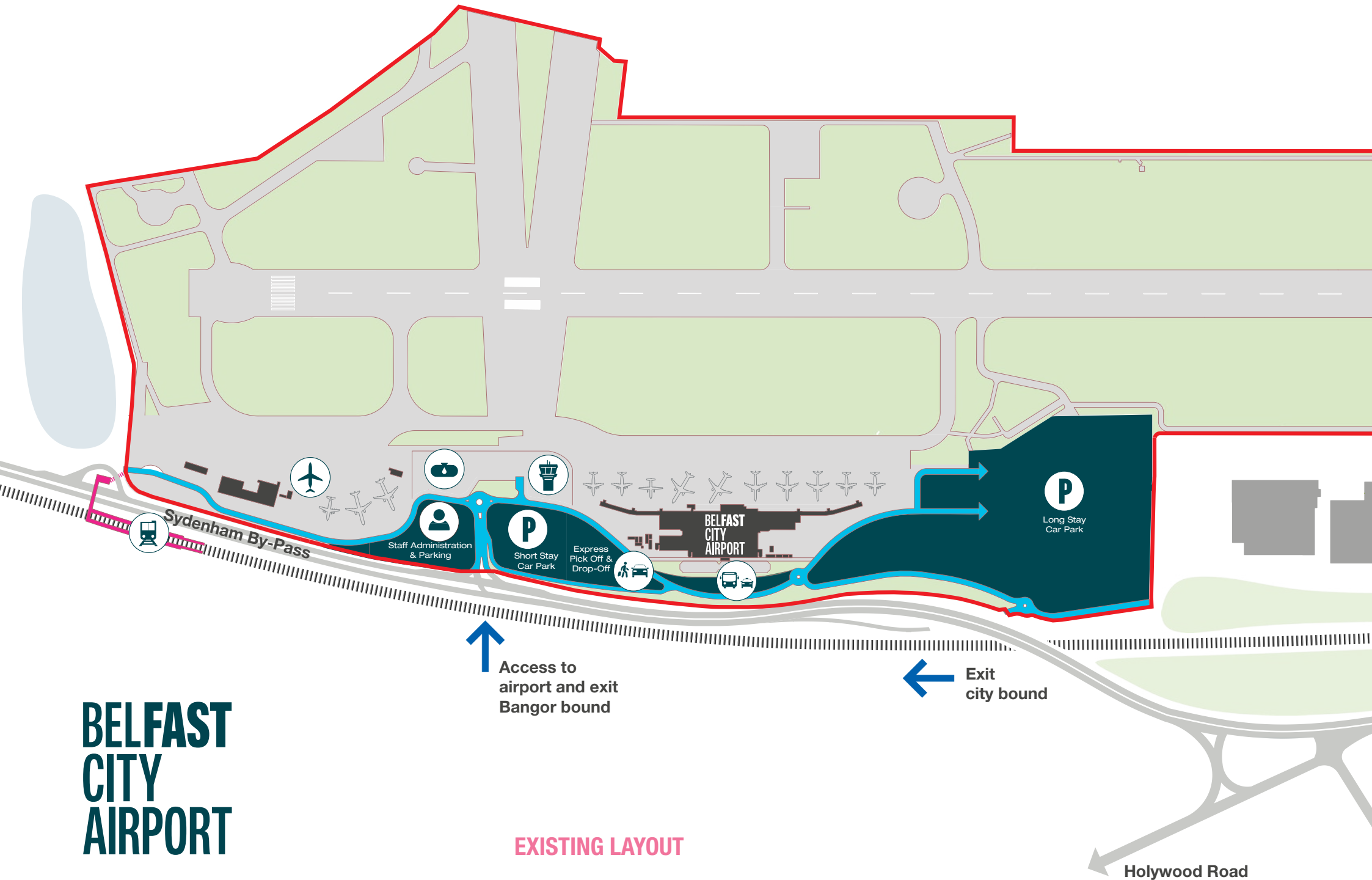
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## Stephen McKeown



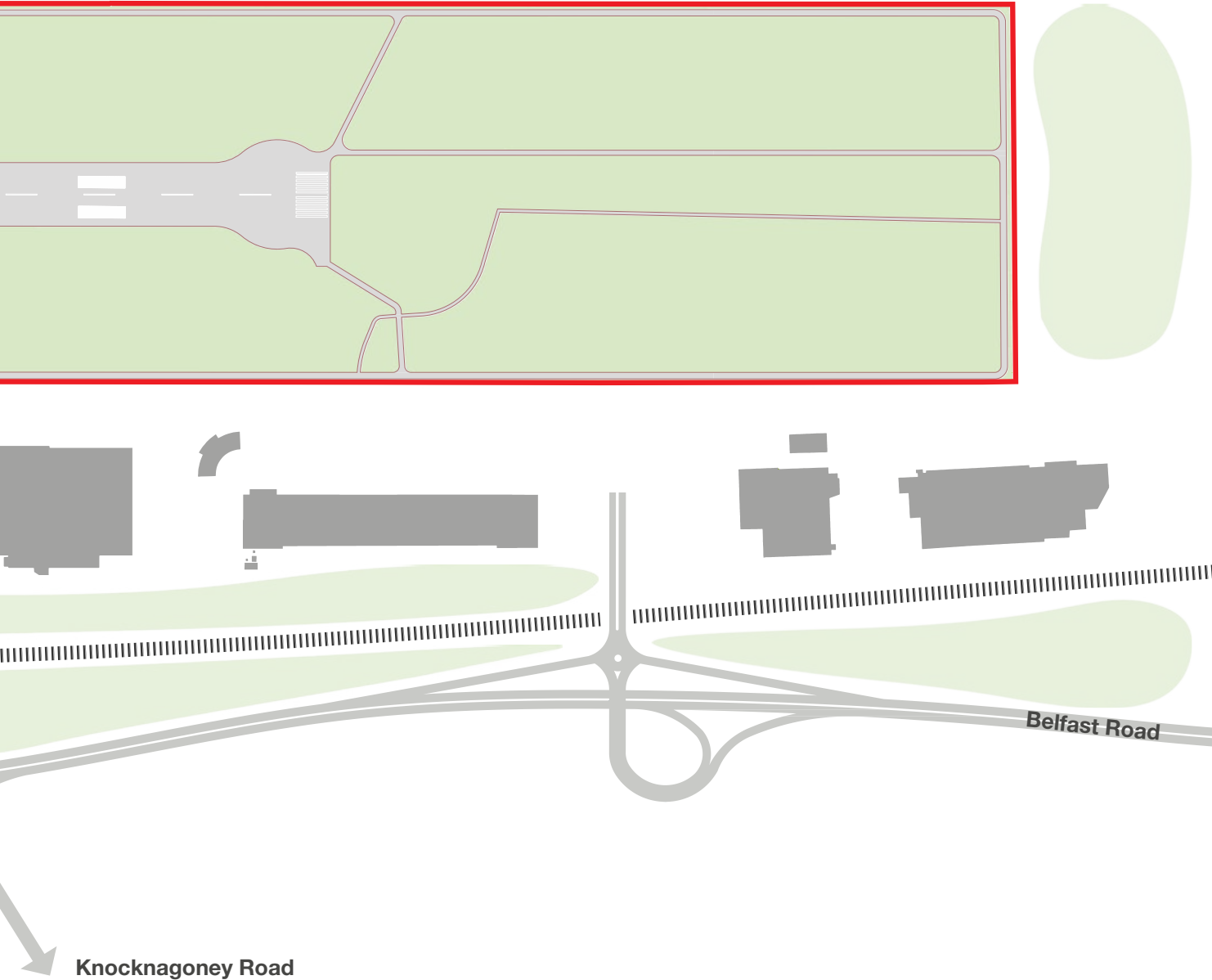
**Global Vice-President, Allstate**  
**Managing Director, Allstate Northern Ireland**

As a digital centre of excellence in Europe, Allstate Northern Ireland is a major employer in Belfast. We have a long-standing commitment to innovation that requires our people and teams to meet and collaborate regularly around the world. Belfast is an important location for us, and the proximity of Belfast City Airport is a vital link connecting our company and helps bring economic prosperity. Proposed growth at Belfast City Airport through this visionary Master Plan will facilitate greater opportunity for access and connectivity, crucial for our region.
















# BELFAST CITY AIRPORT

EXISTING LAYOUT



## KEY

-  Site Boundary
-  Belfast to Bangor Railway Line
-  Terminal & Airport Buildings
-  Existing Runway & Aprons
-  Surface Parking
-  Airport Roads
-  Passenger Drop-off & Pick-up
-  Bus & Taxi Forecourt
-  Public Parking
-  Fuel Storage
-  General Aviation
-  Rail Halt & Pedestrian Link Bridge
-  Air Traffic Control Tower

# 2

## BELFAST CITY AIRPORT TODAY

### *Destinations We Connect*

**Belfast City plays a leading role in connecting Northern Ireland with the rest of the UK and Europe, with a total of 23 routes operated by six airlines.**

In 2024 we welcomed almost 2.4 million passengers; over 90% of these were domestic travellers back and forth between Northern Ireland and the rest of the UK (compared to 70% across the Northern Ireland market). We currently serve more domestic destinations than any other airport in the region along with some seasonal leisure routes. Critically we have strong international links through major hubs such as London Heathrow and Amsterdam's Schiphol.

These provide access to global destinations, providing more global connectivity than the other Northern Ireland airports combined. As valuable as these connections are, further opportunities exist to enhance Northern Ireland's productivity by expanding the range of direct air links.

The current wide range of domestic routes provides a strong foundation, and with an increase in capacity there is an opportunity to bolster domestic and international connectivity, particularly to key destinations in Europe, to meet the increasing demand of business and leisure travellers.

THE HEART OF *Belfast*

**CONNECTING**  
**23 DESTINATIONS**

**OPERATED BY**  
**KEY AIRLINE**  
**PARTNERS**

INVERNESS  
ABERDEEN  
GLASGOW  
EDINBURGH  
ISLE OF MAN  
LIVERPOOL  
LEEDS BRADFORD  
MANCHESTER  
EAST MIDLANDS  
BIRMINGHAM  
CARDIFF  
NEWQUAY  
EXETER  
SOUTHAMPTON  
BRISTOL  
LONDON  
AMSTERDAM

VERONA

BOLOGNA

PALMA DE MALLORCA





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## Dr Ryan J Feeney



Vice-President (Governance & External Affairs)  
and Registrar, Queen's University Belfast

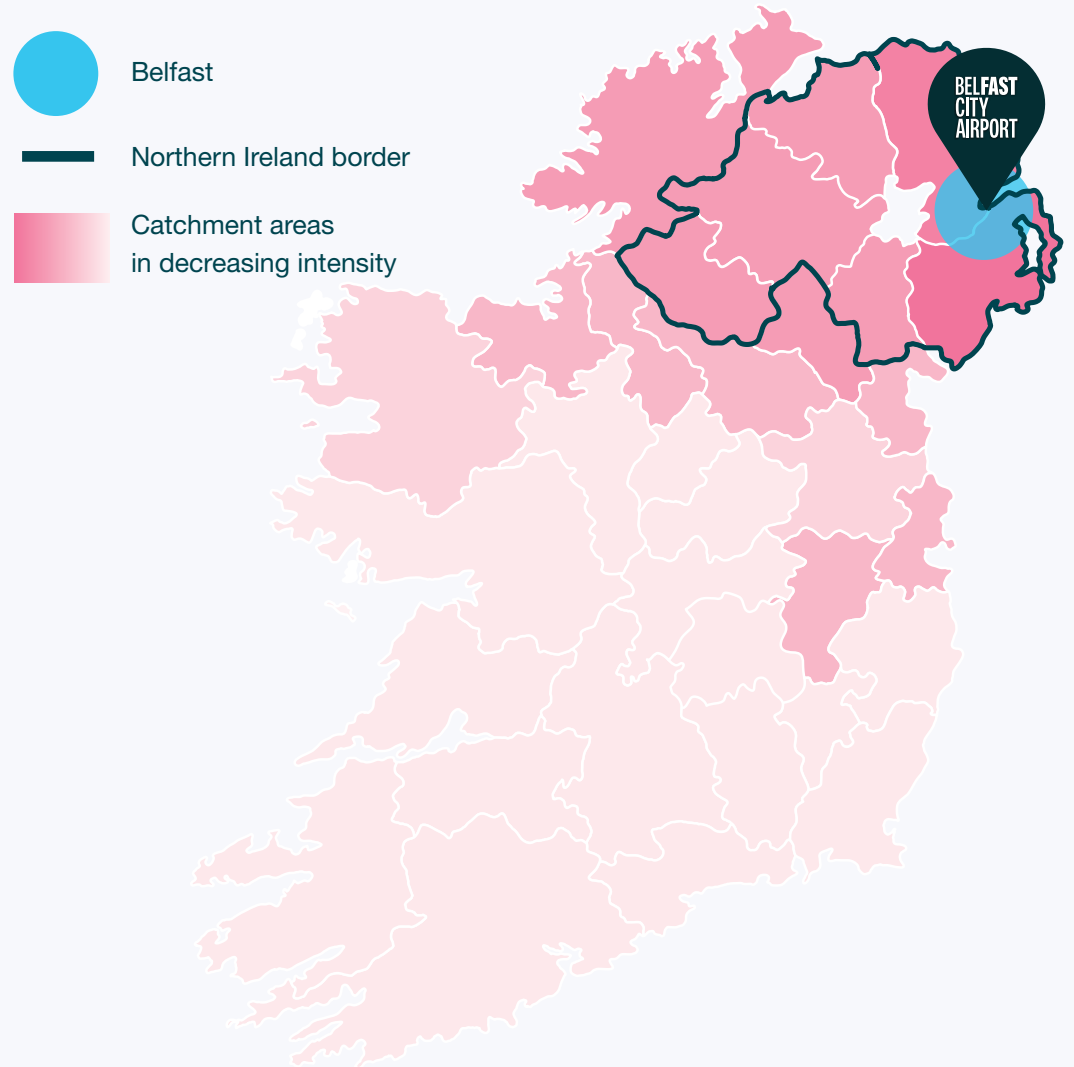
We rely on the efficient and accessible air transport links that Belfast City Airport provides to maintain and grow our international partnerships, attract world-class academics, and support the mobility of students, staff, and visitors alike.

Our academic community routinely benefits from the airport's accessibility and its ability to facilitate timely travel for conferences, research collaborations, and incoming delegations. Belfast City Airport is of strategic importance to the economic, academic, and social development of both Belfast city and the wider region.

The majority of the airport's catchment area sits within Northern Ireland. Around 8% of passengers also come from an extended catchment within the Republic of Ireland. More routes will help meet the needs of passengers from across the region and support Northern Ireland's Regional Development Strategy.

A total of 27% of air passengers travelling to and from Northern Ireland today choose Dublin Airport, largely because of the wider range of direct services available. Many of these passengers are flying to European destinations not currently served by any of Northern Ireland's airports. By broadening their range of direct connections, we and the other Northern Ireland airports will help to meet this passenger demand and further support the wider economy.

### Passenger catchment area for Belfast City Airport



# Our Economic Contribution

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## STRATEGIC CONTEXT

**Northern Ireland is physically separated from the rest of the UK and air travel plays a vital role in connecting us. Air travel is also our only way to stay connected to Europe and the wider world.**

In addition, Foreign Direct Investment (FDI) and exports play a crucial role in Northern Ireland's economy and are expected to remain key contributors to future prosperity. For multi-national companies, good air links are essential to access markets, provide after-sales support, carry out R&D, and manage international operations.

Around 78% of all Northern Ireland passengers that connect via another airport to reach their destination fly from Belfast City. Most of these passengers fly via Heathrow with British Airways, which operates up to seven services per day, and via Manchester and Amsterdam.

With its proximity to Belfast's city centre, the airport is also of particular importance to the business market, with around a third of all passengers travelling for business. Prior to the Covid-19 pandemic, this was above 40%; whilst business travel has been growing since, leisure travel has grown faster. In the UK, only London City and Aberdeen Airports have such a high proportion of business traffic.

Tourism is also increasingly important for Northern Ireland. Inbound visitor numbers have risen steadily over the past decade and in 2024, approximately 3.4 million visitors came – more than double the 1.6 million recorded in 2011.

This growth reflects Belfast's emergence as a popular short-break destination and continued interest in long-standing attractions such as the Giant's Causeway, Game of Thrones filming locations, world championship golf courses and the Mourne Mountains.

## KEY EMPLOYER AND DRIVER OF ECONOMIC ACTIVITY

Within Belfast, it is estimated in 2024 the airport generated £450 million<sup>2</sup> in Gross Value Added (GVA) and supports 6,420 jobs of which 1,120 jobs are through direct employment on the airport site. Across Northern Ireland as a whole, the airport's total economic impact is substantial, contributing £800 million in GVA annually and supporting around 12,000+ jobs in 2024.

The airport helps create and sustain jobs in many ways. Day-to-day operations support local employment both on site and through the wider supply chain, while the wages paid to staff are spent in the community, boosting local businesses.

Beyond this, the airport's connections bring wider benefits to business and tourism, making it easier to trade and grow, attracting investment, and encouraging more visitors to come and experience what the region has to offer.

Total impact across Northern Ireland in 2024:



**£800m**

contributed  
annually in GVA



**12,000+**

jobs supported in  
the region



# Our Community

**Our ties with our local community are deep-rooted. We pride ourselves on creating a positive and long-term social impact while meeting the needs of our community in a tangible way.**

This dedication to fostering social transformation is in our DNA and is evident in the support we provide for local people, schools and education, charitable groups, environmental initiatives, health and wellbeing ventures, and projects that build a resilient, connected, and thriving community.

This work is far reaching, and we have a number of key initiatives that reflect our dedication to forging strong partnerships, sharing prosperity, and uplifting the place we call home.



## Community Fund

Officially launched in 2009, the Belfast City Airport Community Fund benefits local projects that promote social inclusion, education, community development, and environmental awareness. Since its inception,

we have donated almost £700,000 to 237 projects across Greater Belfast and North Down. We have plans to increase total spend to over £1 million within three years.



**237**

projects supported

## Ignite Youth Leadership

Our award-winning IGNITE Youth Leadership Programme aims to nurture future leaders and empower young people through education, providing them with unique opportunities to collaborate with youth organisations, charities, and recognised names in the fields of sport, media, and

entrepreneurship. Representing an investment of £80,000 per year, IGNITE has helped more than 154 young people since its inception in 2019.

 **£80k**  
per year invested



## Autism in the Air

To drive positive change, our one-of-its-kind Autism in the Air programme champions inclusive and accessible experiences, removing the unknown from travel. This 'try before you fly' scheme has given 528 families to date the opportunity to experience a live airport environment, supporting our broader mission to ensure that every passenger feels safe, welcomed, and understood.



**528**

families engaged to date

## High Flyers Apprenticeship Programme

Created in 2013 to tackle youth unemployment and address entry barriers, particularly for women, High Flyers provides on-the-job experience and qualifications that focus on technical proficiency, safety, teamwork, and leadership.

Women account for 24% of our apprentices in an industry traditionally dominated by men, and we boast a 100% success rate, with all apprentices completing the programme and going on to have meaningful careers.



# 100%

graduation success rate



# 24%

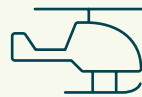
of participants are female



## Charity Partner of the Year

Each year, the airport selects a charity, raising funds and awareness through events such as sponsored runs and coffee mornings.

During its time as our Charity Partner for 2024/2025, Air Ambulance NI has raised over £100,000 through its annual Runway Run – a 5km race that takes place on the airport's runway.



# £132k

raised for Air Ambulance  
Northern Ireland 2024/25



# 5km race

on runway annually



## Michele Bryans

CEO, EastSide Partnership

Belfast City Airport plays a major role, not only for Northern Ireland at a regional level, but for East Belfast. Its positive impact in terms of direct employment and its support for community projects and local economic development is core to how it operates. This new vision has the potential to support further regeneration projects and local tourism and help our community reach its full potential.

# Current Operational Controls

Airports in the UK are generally controlled through planning and environmental consents. Controls vary depending on the location of the airport, their scale and their importance.

Belfast City Airport operates in accordance with a 2019 Planning Agreement with the Department for Infrastructure (DfI). The current Planning Agreement sets out a series of covenants and these are the most comprehensive for any airport in Northern Ireland.

They include controls on:

- ✈ Aircraft noise, including the numbers and types of aircraft operating at the airport.
- ✈ The hours within which flights are permitted.
- ✈ The noise exposure resulting from aircraft operations.

**The most recent annual compliance report for 2024 confirmed that Belfast City Airport maintained full compliance with the requirements of our Planning Agreement.**

## CURRENT COVENANTS



**Noise Contour Area Limit** – this was set by DfI at a maximum of 5.2km<sup>2</sup> in order to control the total envelope of aircraft noise exposure from the airport (based on the 57 dB LAeq,16h contour). The current limit is sufficient to accommodate the anticipated growth to 2040.



**Noise Quota Count System** – this limits the number of ATMs based on the noise performance of the aircraft (the quieter the aircraft, the larger the number of aircraft that can be flown within the limit) – this incentivises airlines to fly quieter aircraft at Belfast City. The limit is currently set at 4,655 annually – this is also sufficient to accommodate anticipated growth to 2040.



**Annual ATM Limit** – an ATM is either a landing or a take-off by an aircraft at the airport. The limit is currently set at 48,000 movements annually. If retained at this level, this would prevent us reaching the capacity required to serve the forecast growth in passenger traffic.



**15 Hour daily flight time limit** – scheduled flights are permitted between 06:30 and 21:30 during what are defined as ‘permitted hours’ in the Planning Agreement. Flights are also allowed between 21:31 to 23:59 (defined as ‘extended hours’) to accommodate delayed flights in exceptional circumstances. Further flexibility may be required for scheduled ATMs to serve the forecast growth in passenger traffic.



swissport

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# 3

## MEETING PASSENGER DEMAND

### *Increasing Demand to Fly*

**The market for air travel to and from the island of Ireland is expected to double from just over 45 million passengers in 2024 to over 90 million passengers by 2040.**

This means all airports across Ireland will need to play their part to ensure demand can be met and the economic benefits are realised. Given the expected growth in demand across the island of Ireland and the capacity challenges at Dublin Airport, the other airports will need to expand both their passenger capacity and their network.

For the overall growth in demand to be met, Northern Ireland's airports will need to handle around 21 million passengers annually by 2040. This is made up of a projected 19 million passengers, either originating in or travelling to Northern Ireland, being able to use their local airports, as well as around 2 million passengers from the Republic of Ireland using Northern Ireland airports as their most convenient choice.

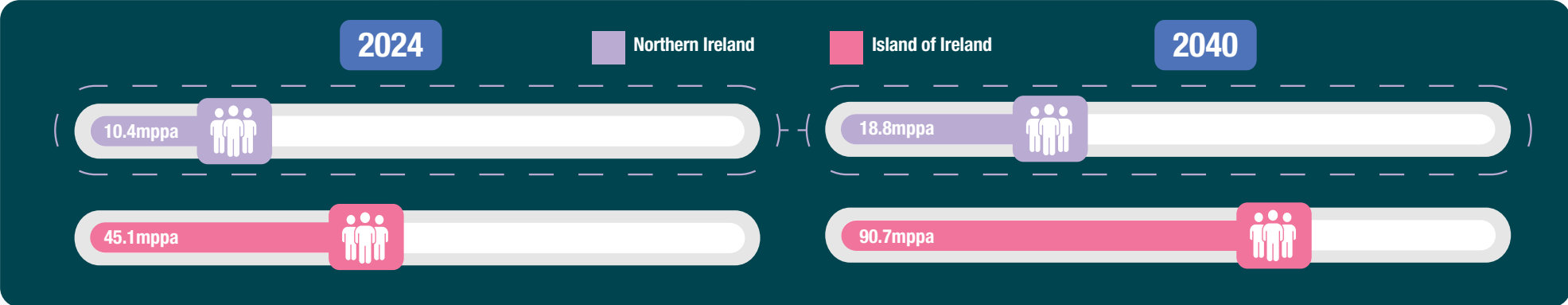
# THE HEART OF *Belfast*

Belfast City and the other Northern Ireland airports already provide a breadth of connectivity to key UK cities. This market is critical for business and leisure purposes. Whilst the breadth of destinations served is currently strong, there will be continued growth in demand for these connections throughout the period to 2040 and it is very important to ensure continued connectivity at the right levels of frequency to effectively serve this market.

Beyond the domestic market, there is a gap in our connections to global cities. Belfast City already makes a material contribution with its connections to Heathrow and Amsterdam but needs to do more to help Northern Ireland deliver an improved range of connections, both directly and through hubs.

**The gaps in the network mean 2.7 million passengers per year, many of them for leisure, went via Dublin to fly to global destinations in 2024; this is a missed opportunity for Northern Ireland.**

**Projected Passenger Demand (mppa = Million Passengers Per Annum)**



# Forecast Future Demand at Belfast City Airport

**Our forecasts suggest that demand to use Belfast City will increase to 7 million passengers annually by 2040.**

Within this figure, passenger numbers to domestic destinations are expected to grow by 68% by 2040, highlighting the continuing importance of this market to Northern Ireland and the key role Belfast City plays in it.

Beyond the UK, the most rapid growth is expected to be on routes to key European centres and in the range of leisure routes to the Mediterranean.

The European routes and the domestic growth will contribute most to increasing the connectivity that is of greatest value to the Northern Ireland economy. The demand to use Belfast City to access these routes will come from both within Northern Ireland and from the Republic of Ireland.

To meet demand of 7mppa, we anticipate that more airlines will need to base more aircraft in Belfast, allowing them to meet demand and service a broader range of UK and European destinations, both for business and leisure.

As well as more based aircraft, we anticipate that there will be an increase in aircraft overnighting at the airport to enable additional services to key European hubs, as airlines need to have aircraft available for the beginning and end of the day to make the connections with the hubs' broader networks.

As the airport grows to meet demand and provide more services to more destinations, we will complement the services provided at other Northern Ireland airports while also helping to deliver lower fares for passengers and ensuring quick, convenient access for residents and visitors alike.

The projected growth in passenger demand at Belfast City of 7mppa by 2040 would require around 61,000 ATMs. The rate of increase in ATMs is lower than the rate of passenger growth due to many of the future flights being on newer generation aircraft. In addition to being quieter, these aircraft also have more seats than the older generation aircraft. For example, we would expect the average ATM to carry 115 passengers by 2040, compared with 80 today.

**Projected Passenger Growth at Belfast City Airport**





# Delivering Northern Ireland's Programme for Government

The Northern Ireland Programme for Government (PfG) 2024-2027<sup>3</sup> outlines key priorities aimed at improving the lives of people in Northern Ireland, focusing on economic growth, public services, and social issues to be delivered through key missions.

The PfG recognises the importance of connectivity with the rest of the domestic UK market to help bridge the economic performance gap.



Our airports also play an important role in terms of connecting people, supporting our tourism offering and delivering economic growth. We will look at how we can develop new routes and offer further support to our three airports in terms of this wider agenda.

Source: p67, PfG



## PROSPERITY

Improving economic productivity while making sure that we have an economy that works for everyone.



## PEOPLE

Working to support everyone at all stages of their life to ensure they have the chance to succeed by improving life opportunities.



## PLANET

Harnessing the potential of the green economy while ensuring an equitable transition to a sustainable and affordable society.

The improvement of productivity is a key action to meet the objective to “Grow a Globally Competitive and Sustainable Economy” under the Prosperity mission as productivity is a key challenge for Northern Ireland. Improving air transport accessibility is acknowledged as a critical factor that can contribute to improving productivity in the economy and air transport activity is recognised as a high

productivity activity. Although the Northern Ireland economy has been growing more rapidly than that of the UK as a whole since the global financial crisis, there remains a significant productivity gap, with productivity in Northern Ireland 11% lower than the rest of the UK<sup>4</sup> and 40% lower than the Republic of Ireland. This gap has widened over time.

Our Master Plan aligns and supports the PfG Missions of Prosperity, People, and Planet by acting as a key enabler of economic growth, social inclusion, environment and innovation.

## MISSION 1: PROSPERITY

### Supporting a High Performing, Competitive Economy

- ✈️ **Boosting Productivity and Driving Business Growth:** Improved airport infrastructure and route connectivity strengthen Northern Ireland's links with the UK, Europe, and beyond – attracting investment, supporting exports, and making Belfast more appealing to startups, scale-ups, and multinationals.
- ✈️ **Tourism:** Air access is vital to tourism, driving visitor numbers, jobs, and spending across hospitality, culture, and transport. Growth in tourism also spurs further investment in skills, infrastructure, and services, boosting regional productivity.
- ✈️ **Job Creation:** The investment will generate significant employment through airport operations, supply chains, and wage-related spending, delivering strong local and regional economic impact.

## MISSION 2: PEOPLE

### Tackling Disadvantage and Promoting Inclusion

- ✈️ **Skills Development:** The Master Plan creates pathways to jobs and training, especially for young people and the long-term unemployed, through college partnerships and apprenticeships that build essential skills.
- ✈️ **Social Inclusion:** Affordable, reliable air travel keeps people connected and opens access to education, employment, and cultural opportunities, supporting a more inclusive Northern Ireland.

## MISSION 3: PLANET

### Delivering on Climate Change

- ✈️ **Decarbonising Operations:** including using 100% renewable energy sources, minimising the consumption of natural resources and facilitating the uptake of Sustainable Aviation Fuels (SAF).
- ✈️ **Sustainable Travel:** Expand public and active transport options and explore a new rail link, promoting healthier, greener connectivity.
- ✈️ **Climate Resilience:** Integrate climate-proofing measures, such as Sustainable Drainage Systems (SuDS), to ensure airport operations remain resilient under changing weather conditions.



# Aviation Policy

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The overall policy on airports and aviation is set at UK level. As a devolved function of the Northern Ireland Executive, the Department for the Economy (DfE) is in the process of preparing an aviation and air route development strategy following a review of air connectivity last year.

UK policy on airports is supportive of airport growth, with specific emphasis on airports making best use of their existing runways – other than Heathrow where a new runway is proposed. This is set out in the UK Department for Transport's 'Beyond the Horizon: Making Best Use of Existing Runways' (2018)<sup>5</sup>, and is known as the 'Making Best Use' (MBU) policy.

'Beyond the Horizon' was published alongside the 'Airports National Policy Statement'<sup>6</sup> (ANPS) that confirmed policy support for the provision of a third runway at Heathrow. Although supportive of the principle of airports making best use of their existing runways, the Government is also clear that decisions on individual plans and proposals should be made having regard to both the positive economic benefits and any negative environmental effects, including noise and health effects.

The most recent overall national statement on aviation policy is 'Flightpath to the Future'<sup>7</sup>, published by the UK Department for Transport in 2022 as a 10-year strategy for the recovery of the aviation industry following the Covid-19 pandemic. This confirmed that the ANPS and MBU remain the relevant policies for considering expansion and growth at airports.

This was again confirmed in the UK Government's 'Jet Zero Strategy'<sup>8</sup> of 2022. Jet Zero sets out the targets and actions that the Government intends to take to ensure that the aviation sector can continue to grow and deliver economic and connectivity benefits to the UK whilst making its contribution to the UK achieving its climate change target of net zero emissions by 2050. This is the overarching policy regarding carbon emissions from aircraft and airports, which is dealt with at a UK rather than Northern Ireland level.

As recently as January 2025, the new UK Government confirmed its ongoing commitment to the growth of the aviation sector and airport expansion, including Heathrow. It stressed that capacity constraints at airports were a barrier to realising the economic growth benefits of aviation, which are a key part of the Government's economic growth agenda.

## THE HEART OF *Belfast*

The ongoing relevance of the ANPS and MBU was also confirmed by UK Government decisions in 2025 regarding airport growth, notably in relation to London City and London Luton Airports as well as in the indication given that the UK Government is minded to support bringing the emergency runway into full use at London Gatwick Airport, all of which have stressed the important economic benefits of airport growth.

**This Master Plan has fully considered the positive commitment of the UK Government towards aviation growth whilst having regard to environmental constraints.**

# Economic Benefits of the Master Plan

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Investing in airport infrastructure is a high-impact lever for driving growth, productivity, and international competitiveness.

This Master Plan will deliver transformational economic benefits, not only within the immediate vicinity of the airport and Belfast but across Northern Ireland.

By aligning infrastructure development with future demand, technological innovation, and environmental objectives, the Master Plan will drive investment, support high-value employment, enhance trade and tourism, and improve accessibility for businesses and communities alike.

**By growing to handle 7 million passengers by 2040 the airport is projected to generate £1.2 billion in GVA for Belfast annually and support over 15,000 jobs in the city.**

Over 1,100 new jobs will be created at the airport site, growing the total employment at the airport to 2,260.

These economic gains will stem from both current operations and the additional jobs and investment delivered through the Master Plan. The 1,100+ new positions will span a wide range of functions and skill levels, creating clear pathways for workforce upskilling and aligning with Government priorities on skills and employment. They will also make a significant contribution to addressing the business critical skills shortage currently experienced and highlighted by our airline partners, across the aviation sector.

The airport's growth will also deliver a significant boost to business productivity and inbound tourism. Investment in infrastructure will enable airlines to introduce new routes, improving connectivity, operational efficiency, and access to global markets.

At the same time, a modern, well-connected airport will make Northern Ireland more accessible and attractive to both domestic and international visitors, stimulating spending across accommodation, restaurants, attractions, retail, and other services.

These wider benefits would stem from a substantial private sector investment in Northern Ireland with the potential to reshape the region's economic landscape, strengthen global connectivity, and unlock long-term prosperity for businesses and communities.

**Across Northern Ireland as a whole, the airport's growth to 2040 is projected to generate £1.7 billion in GVA annually and support over 23,000 jobs.**

By 2040 the Master Plan will deliver the following for Northern Ireland:



**£1.7bn**

in economic  
contribution annually



**23,000+**

jobs supported  
across the region



**1,100+**

new jobs created  
at the airport



## Social Benefits of the Master Plan

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The Master Plan represents a strategic investment in Northern Ireland's future, driving economic growth, attracting inward investment, and creating jobs.

These benefits extend far beyond the business sector. By enhancing connectivity and supporting communities, the Master Plan lays the foundation for long-term prosperity.

Airport development creates jobs directly in construction and operations, while also stimulating employment in tourism, retail, and the service sector. Our targeted investment will offer new opportunities which we will ensure are maximised through the creation of bespoke pathways to training and employment – especially for young people and the long-term unemployed.

**We will create a new employment academy with an aspiration to deliver up to 15% of new jobs through apprenticeships – working with key partners and educational organisations to create meaningful training and employment opportunities.**

Partnerships with our supply chain partners and education and training providers will support skills development in niche airport operations to include aviation, logistics, hospitality, and customer service, creating a highly-skilled, resilient local workforce.

It also enhances terminal accessibility and makes travel more inclusive for people without cars or with mobility challenges. These investments also support environmental goals by encouraging sustainable transport choices and helping to reduce carbon emissions.





## THE HEART OF *Belfast*

The airport's positive social impact will also grow through the expansion of the airport's Community Fund. We are already increasing our funding from £700,000 to £1 million within the next three years to enable the airport to support a greater number of local schools, charities, and community projects, particularly those focused on education, environmental sustainability, wellbeing, and youth development.

The Community Fund will continue to grow as we move towards 2040 and realise the aspirations for growth and investment set out within the Master Plan. By investing our community funds in worthy causes across Belfast and particularly those communities closest to us, we will play our part in tackling socio-economic inequality.



# 4

## MASTER PLAN 2040 – OUR VISION

### Master Plan Overview

Our Master Plan has been shaped by the opportunities and constraints within the airport campus and the surrounding area.

This section outlines the infrastructure required to accommodate 7 million passengers per year by 2040 to make the most of our existing runway and land within the existing airport boundary.

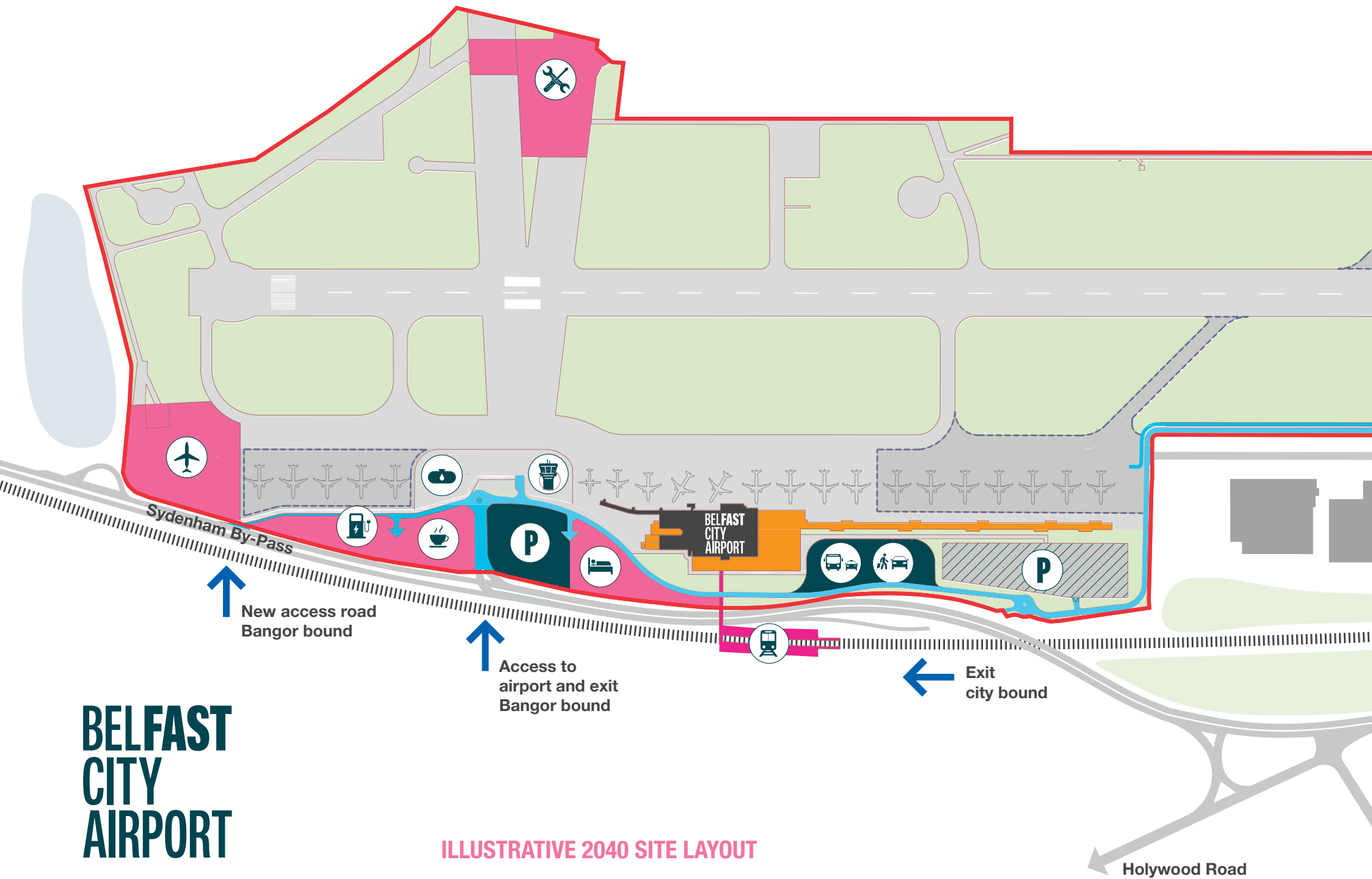
The potential layout of the airport campus in 2040 is supported by a series of illustrative images to show how the infrastructure could look. As this is a long term vision for the airport campus, the overall layout and infrastructure may be subject further refinement and review during the Master Plan period, depending on specific circumstances and regulatory requirements.

**Our vision could be unlocked through a substantial private investment of up to £200m over the next 15 years.**

The key infrastructure as shown on the illustrative site layout overleaf includes:

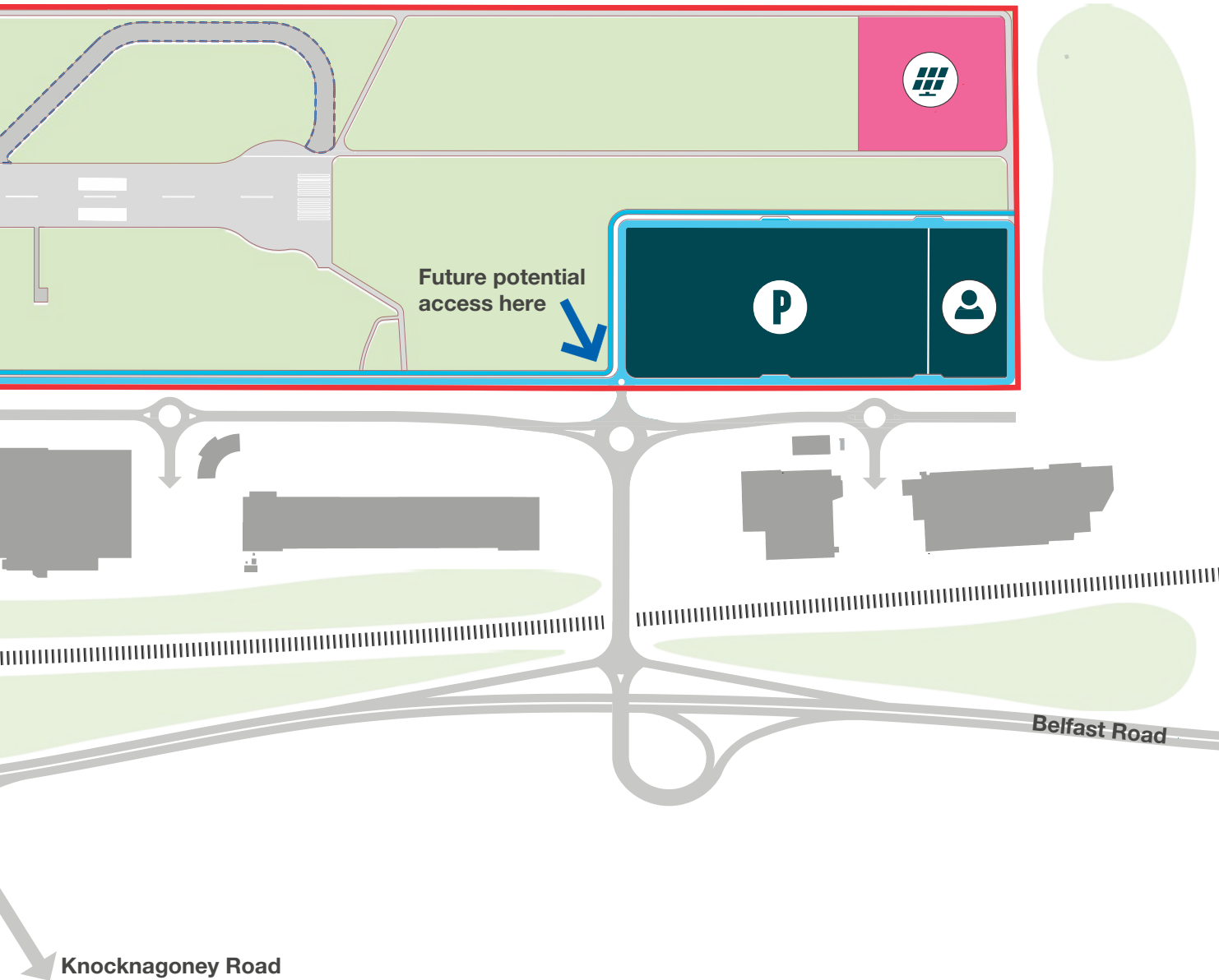
-  **An extension of the existing terminal**
-  **New aircraft stands, aprons and taxiway**
-  **Surface access improvements including new multi-modal forecourt prioritising public transport, consolidated car parking, and improved access**
-  **An opportunity to deliver a transformational rail halt directly serving the airport**
-  **An opportunity to maximise onsite renewables**
-  **Complementary onsite development to include a new hotel and EV charging forecourt with ancillary convenience facilities**




























# BELFAST CITY AIRPORT

ILLUSTRATIVE 2040 SITE LAYOUT



## KEY

-  Site Boundary
-  Belfast to Bangor Railway Line
-  Terminal & Airport Buildings
-  Existing Runway & Aprons
-  Surface Parking
-  Airport Roads
-  Ancillary Airport Uses
-  Extended Terminal & Pier
-  Decked Car Park (Ground Floor plus 1)
-  New Stands & Taxi Ways
-  Passenger Drop-off & Pick-up
-  Bus & Taxi Forecourt
-  Public Parking
-  Fuel Storage
-  General Aviation
-  Rail Halt Opportunity & Pedestrian Link Bridge
-  Air Traffic Control Tower
-  Remote Aircraft Parking & Maintenance Hanger
-  Convenience & Drive-Through
-  EV Charging Services
-  New Hotel
-  Staff Parking
-  Renewable Zone

# Master Plan Infrastructure

The existing terminal building will need to be extended, restructured and reorganised internally to better accommodate future passenger demand of 7mppa as well as meeting modern requirements for security, baggage handling and screening.

A new two-storey pier to the east of the extended terminal will provide access to the new aircraft stands allowing for faster, more efficient boarding and a clearer, more intuitive journey through the terminal building.

The extended passenger facilities will maintain the quick and convenient passenger journeys of today and build on the recently completed £3 million upgrade to our security screening. It will also further enhance comfort and overall passenger experience, while providing a range of extended and improved retail, food and beverage offerings.

As shown in the illustrative CGIs, the extended terminal building will serve passenger demand to 2040 while also becoming an iconic new first impression for those arriving in the city.

## The design principles for the future terminal will align with our strong desire to:



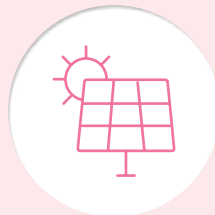
Create an iconic first impression of Northern Ireland through the creation of a gateway that reflects the rich industrial heritage of the city in a contemporary way.



Use inspiration from the local mills, factories and H&W cranes.



Maintain the existing buildings while delivering phased expansion, wrapping around the terminal to protect customer experience.



Maximise use of sustainable materials to include timber structures and renewable technologies throughout – for example, use of a ‘saw-tooth’ roof providing daylight while also accommodating solar/ photovoltaic panelling.



Integrate natural materials and provide habitat for indigenous species throughout landscaping proposals.



Improve the passenger experience and wayfinding through transparent design – a prominent new main entrance could be co-located to link to any future rail halt directly serving the extended terminal.



BELFAST CITY AIRPORT

THE HEART OF Belfast

## AIRFIELD

In line with UK Government policy to make best use of existing runways, this Master Plan includes targeted upgrades to airfield aprons and taxiways as follows:

➤ A total of up to 21 aircraft stands (up from 13 today).

➤ Extended apron and taxiways to link the new and reconfigured stands to the runway.

➤ A new holding loop at the end of the runway to improve runway utilisation – this allows multiple aircraft to queue on the airfield ahead of departure and facilitates the flow of departures at the busiest times.

**We do not anticipate that any runway extension would be required to reach 7mppa.**



# THE HEART OF *Belfast*



## SURFACE ACCESS IMPROVEMENTS FACILITATING MORE SUSTAINABLE TRAVEL

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Findings from recent passenger surveys commissioned by the airport indicate a positive but limited incremental shift away from private cars towards increased use of public transport from a base of just over 6% before the outbreak of the Covid-19 pandemic. This trend suggests a growing preference among passengers for more sustainable modes of travel when accessing the airport.

The airport is currently rolling out a series of measures and targets aimed at increasing public transport use and reducing the proportion of car trips to and from the airport in the short term.

Over the longer term to 2040, our Master Plan includes measures to facilitate improved use of public transport as well as capping the amount of future parking. This will accelerate the move towards more sustainable forms of travel to and from the airport.

Some of the surface access improvements included in the Master Plan include:

- ✈️ A new multi-modal forecourt outside the newly extended terminal which will provide enhanced facilities for travel by pedestrians, cyclists, bus, coach and taxis, ensuring convenient access to the terminal buildings for all modes of travel. The forecourt could also incorporate a designated public pick-up and drop-off zone (PUDO).
- ✈️ Some reconfiguration of the access and road layout. Subject to further investigation with DfI, these could include measures such as:
  - ✈️ A new entry slip lane from the Sydenham Bypass for eastbound traffic, providing more direct access to the airport and reducing congestion on the surrounding network.
  - ✈️ Examining the feasibility of altering the existing airport entrance to provide a dual right-hand turn lane for westbound traffic (vehicles travelling from Bangor) to improve capacity and avoid delays during peak periods.

**These enhancements would improve overall traffic flow, reduce journey times, and support better integration with the wider transport network while complementing efforts to increase the use of sustainable transport modes.**

# THE HEART OF *Belfast*



BELFAST CITY AIRPORT

THE HEART OF *Belfast*

Your gateway to the UK and Europe

belfastairport

## OPPORTUNITY FOR TRANSFORMATIONAL NEW RAIL HALT

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The airport has no direct connection to the Northern Ireland Rail (NIR) network and the current timetable does not allow travel for the earliest flights. Weekend services, particularly on Sunday, are limited.

The nearest station to the airport is Sydenham on the Bangor to Belfast line which can be accessed via a 1.2km walk along the western footpath of the A2 Sydenham Bypass. The airport also provides an on-call shuttle bus service to the end of the airport site where access to Sydenham Halt is via a footbridge over the Bypass. Both solutions are sub-optimal and do not sufficiently encourage passengers or staff to use the train.

The airport and Translink continue to work jointly to improve access to strengthen public transport links to the airport. This includes shorter term improvements to bus and walking connections between the airport and Sydenham Halt, as well as continued investment in the Translink bus services to and from the city centre.

Our vision provides a significant opportunity in the longer term to deliver a fundamental modal shift to rail to complement the airport's efforts to increase the numbers of passengers and staff using public transport to and from the airport.

### **Belfast City could become the first airport on the island to have a direct rail connection.**

This would also transform passenger journeys to and from the airport with direct access to the city centre via Grand Central Station.

Around 30% 30% of our passengers travel to the airport from the city centre today. If the proportion stays the same, that would be over 6,000 journeys a day with 7m ppa by 2040. That figure increases when the direct connections across Northern Ireland and the Republic of Ireland, via Grand Central Station, are considered.

Belfast City Airport and Translink have recently partnered to complete and publish a study that confirms a new halt directly serving the airport is feasible and the preferred approach. The next stage for this pioneering public private initiative is to further explore the business case and outline design.

This partnership is a 'statement of intent' and an indication of how the airport is willing to work with the public sector and contribute towards building a more sustainable future and improved experience for its staff and passengers.

Connecting airports via rail follows government policy in the form of the All-Island Strategic Rail Review<sup>9</sup> and Union Connectivity Review<sup>10</sup>. A new rail halt opposite the airport would not only deliver a first impression and proposition Northern Ireland can be proud of. Critically, it will also take cars off the road.

# THE HEART OF *Belfast*





## COMPLEMENTARY AIRPORT USES

Our Master Plan also provides for commercial development that will support the airport's growth. These include, but are not limited to:

- ✈️ A new hotel immediately adjacent to the extended airport terminal buildings. This would be a step change in the range of services provided at the airport, offering passengers overnight accommodation before or after their flights.
- ✈️ An EV charging forecourt with a convenience shop could also be delivered on the airport campus. This would help us in our drive to more sustainable forms of transport to and from the airport while also providing complementary convenience and drive-thru opportunities.

# THE HEART OF *Belfast*



# Creating The Necessary Conditions To Grow

## AIR TRANSPORT MOVEMENTS

While the number of ATMs can vary year to year, prior to the Covid-19 pandemic Belfast City welcomed as many as 42,500 annual ATMs. Post pandemic, annual ATMs have steadily recovered to 30,000 in 2024 with significant further growth expected over the next 15 years.

Based on current trends and forecasts, it is anticipated that the existing cap of 48,000 ATMs will be reached in the early 2030s. Beyond that, and to accommodate the projected growth in passenger demand to 7mppa by 2040, the number of annual ATMs will need to rise to somewhere in the region of 61,000.

As explained on page 38, the rate of increase in ATMs is lower than the rate of passenger growth due to more of these flights being on new generation aircraft which are quieter, more fuel efficient and have more seats.

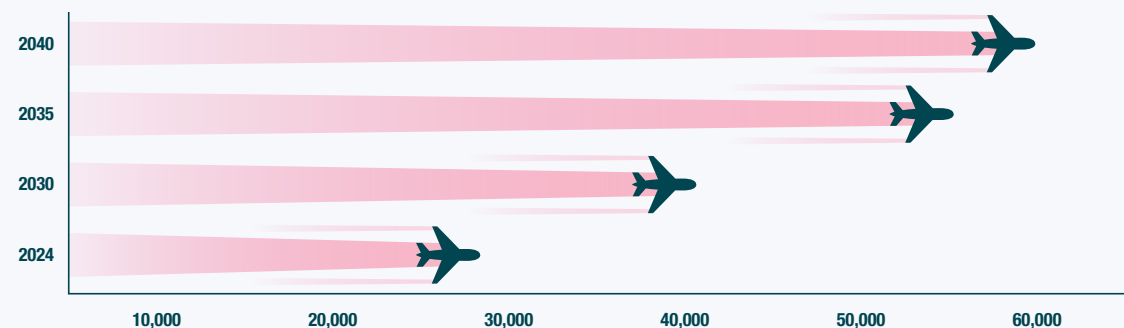
At present, the fleet mix serving the airport mainly comprises turboprop aircraft, current generation aircraft and a small proportion of 'new generation' aircraft.

While there is currently only 7% of the Belfast City aircraft fleet operating on new generation aircraft, they are becoming more commonplace at other UK and Ireland airports where operating conditions are flexible enough to incentivise investment in new fleets.

With passenger growth to 7mppa, and investment in infrastructure alongside increased flexibility for airline operations, airlines will be incentivised to replace current generation aircraft with new generation aircraft.

**Our forecast is that by 2040, up to 60% of the aircraft operating at Belfast City could be new generation aircraft.**

Forecast Aircraft Movements at Belfast City Airport



## OPERATING HOURS

Given the growth, changes in the market and passenger needs that we have seen and expect to continue to see, our airlines tell us that greater flexibility in daily operations is very important to allow them to meet increased demand. It will also be important to allow them to serve the routes our passengers require, particularly given the location of Belfast relative to the rest of Europe.

Our 2019 Planning Agreement currently allows scheduled flights between 06:30 and 21:30 (defined as 'Permitted Hours'). No scheduled flights are allowed between 21:31 and 06:29 (defined as 'Prohibited Hours'). Between 21:31 and 23:59 delayed flights can land or take off in exceptional circumstances.

Improved flexibility will allow airlines to more effectively serve demand, allowing passengers to choose flights that best meet their requirements and to complete their journeys with minimal disruption. It would also avoid the need to divert to other airports thus reducing costs to airlines and passengers, reducing cancellations and ensuring that aircraft are correctly positioned for flights the next day.

Should there be any future detailed proposals for additional flexibility beyond 21:30, a detailed assessment of noise impacts would be carried out and fully consulted upon as part of that process.

The airport would also bring forward measures to protect our local community, including:

- ✈ targeted improvements to our existing Noise Insulation Scheme aligned with relevant policy and industry benchmarks; and
- ✈ accelerating the transition to quieter, new generation aircraft by incentivising airlines to operate these aircraft types (or turboprops) on any scheduled movements beyond 21:30.

**We do not anticipate any future flights, either scheduled or delayed, beyond the current 23:59 limit, nor do we anticipate any flights prior to the existing start time of 06:30.**

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## SUSTAINABILITY AT THE HEART OF OUR MASTER PLAN

### 2024 Sustainability Strategy


Embedding sustainability best practice throughout the airport and our operations is vital to ensure our future growth is both sustainable and responsible.

As the airport grows, we will ensure that this occurs in a sustainable and responsible way and we will seek to avoid, reduce or mitigate any additional adverse impacts, both during the construction phase and from our ongoing operations. Furthermore, we will use the opportunity of redeveloping the airport campus to incorporate a range of environmental and sustainability enhancements, some of which are not technically feasible or cost effective at the airport in its present form.


In 2024 we published our first Sustainability Strategy<sup>11</sup> which set out our key sustainability commitments and ambitions for the future:



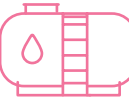
Achieve Net Zero by 2050 (for emissions under our direct control) with ambition to reach this sooner.




Reduce Scope 1 & 2 greenhouse gas emissions by a further 42% by 2030, validated under the Science Based Target initiative (SBTi).




Eliminate onsite natural gas as heat source.




Provide 2% SAF provision in 2025, increasing to 10% in 2030 and 22% in 2040.



Achieve 'zero waste to landfill' by 2040.




Develop a combined carbon, climate change, and air quality management plan to continually drive emissions reductions and improvements across our operations.




Grow and enhance the reach and impact of our community initiatives, including our Community Fund, IGNITE Leadership programme, and educational support.




Enhance local biodiversity on site.



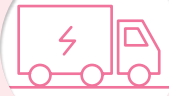
Reach Level 5 of ACI Europe's Airport Carbon Accreditation (ACA) by 2035.



Work with our airline partners to incentivise the use of cleaner, quieter, next generation aircraft.



Reduce site water consumption levels by 50% by 2035 (from a 2022 baseline).



Focus on enhancing sustainable transport options to and from the airport, by the various initiatives and investments described earlier.

We have already made progress. Some highlights include:



Introducing Hydrotreated Vegetable Oil (HVO) as a replacement fuel for all airside vehicles, reducing the use of diesel and reducing carbon emissions.



Reducing Scope 1 and 2 Green House Gas (GHG) emissions (location-based) by 13.29% between 2023 and 2024.



Achieving **93%** in the Global Real Estate Sustainability Benchmark (GRESB), allowing us to benchmark our performance against other airports.



First Northern Ireland airport to achieve Level 3 Carbon Accreditation awarded by ACI Europe.



Completion of full aircraft apron LED lighting retrofit.

To complement our Sustainability Strategy, we will prepare a Sustainability Action Plan within the next 12 months. This will set out the actions we will take over the next five years to deliver on the key sustainability commitments identified within the Sustainability Strategy.



# Master Plan Aspirations

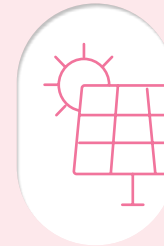
## The Master Plan offers further opportunity to build on our sustainability credentials.

The contemporary and more efficient layout of the terminal and associated structures have the potential to introduce additional energy and resource efficiency measures such as solar PVs, water saving devices, waste segregation/recycling and automated passenger processing facilities with lower energy demands. Additionally, the reconfiguration of the apron, new runway loop and stands will improve the operational efficiency of the runway and should reduce the idling time, and thereby fuel burn, of aircraft on the ground.

These opportunities have informed our aspiration by 2040 to:



**Unlock opportunity to accelerate our net zero target for airport operations** potentially as soon as 2040 (10 years sooner than our previous commitment) – delivered in part through investment in our terminal and airfield infrastructure.



**Achieve 10% of 2040 energy needs through onsite renewables** – to include Solar PV (subject to detailed feasibility).



**Partner with Translink to explore the opportunity for a new rail halt directly serving the airport** – the first partnership between the public and private sector of its kind in Northern Ireland.



**Create a new employment academy with an aspiration to deliver up to 15% of new jobs through apprenticeships** – working with key partners and educational organisations to create meaningful training and employment opportunities.



**Collaborate with partners on the Future of Flight** by working with industry in Northern Ireland to progress pilot initiatives for end users of hydrogen, including airfield operations and zero emission flight. Belfast City Airport is ideally located adjacent to Belfast Port and its short-haul route network is well suited to the early use of electric and hydrogen fuelled aircraft.

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## ENVIRONMENTAL EFFECTS

### Key Environmental Considerations

**We recognise the importance of our contributions to a sustainable future for the aviation sector, including facilitating the transition to cleaner, quieter new generation aircraft.**

In the preparation of this Master Plan we have given consideration to how we can reduce the airport's environmental footprint, most notably by minimising land take to facilitate our growth, as well as identifying clear steps to lessen our impact on local communities.

The environmental impacts of the airport are already effectively managed, with no significant pollution incidents or breaches of environmental controls or legislative standards having occurred for many years. Given the largely industrial setting of the airport and bias for flights over Belfast Lough, impacts on our local community are already carefully managed. We receive relatively few complaints from the public in comparison to other airports, with less than three complaints per thousand ATMs.

In 2024 we received just 79 complaints in total.

A Preliminary Environmental Report (PER) accompanies the Master Plan. This contains a detailed assessment of the baseline environmental and socio-economic conditions of the airport and its geographic setting, and presents the findings of an initial assessment of the potential effects of the future growth of the airport on these conditions, both positive and negative.

The key environmental considerations for the Master Plan are summarised overleaf, with further details on all topics reported in the PER.



## NOISE CONTOUR

All growth to 2040 can be delivered within the existing noise contour area limit.

### Turboprop



### New Gen Aircraft



Growth within the existing noise contour limit is possible due to the transition to cleaner, quieter, more fuel-efficient aircraft. This is supported by aircraft certification and by measurement. These narrow-body, single-aisle jets include aircraft types such as the Airbus A320neo, A321neo and the Embraer 190-E2.

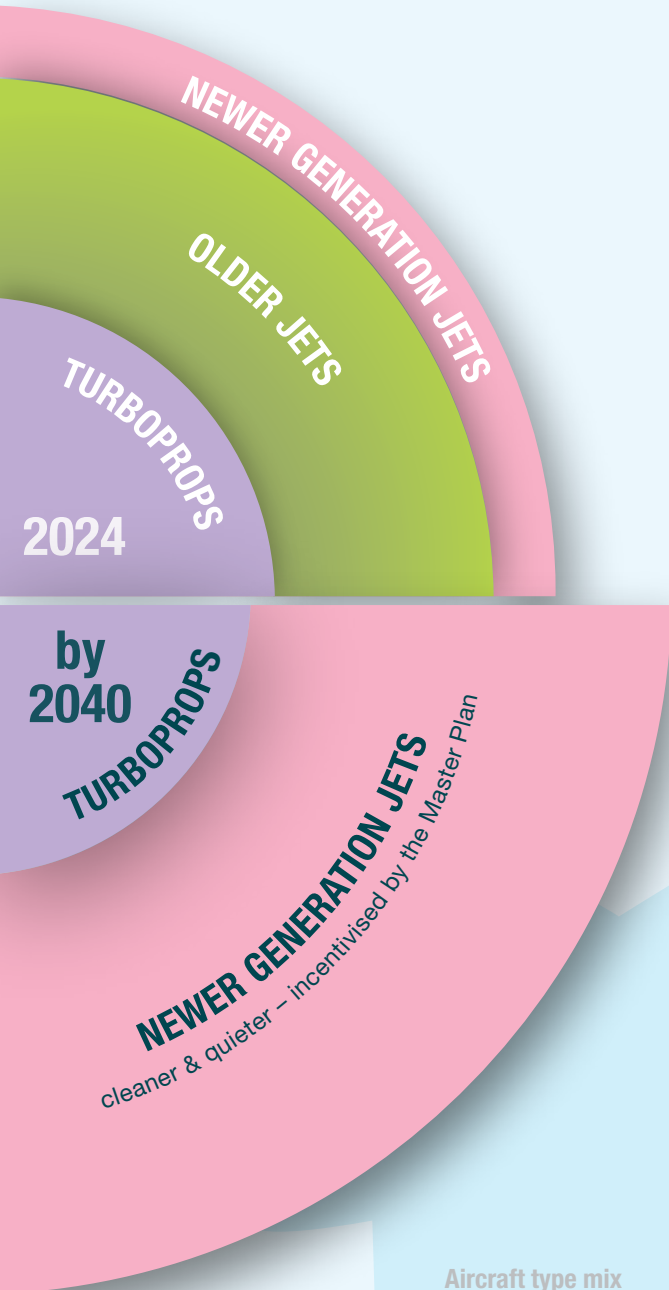
While the new generation aircraft don't look dissimilar to the older variants, they are noticeably quieter and have more seats. There are relatively few new generation aircraft currently operating at Belfast City, albeit the A320neo is used at times by easyJet and British Airways, while the Embraer 190-E2 has been previously flown at the airport by KLM.

As shown overleaf, the proportion of new generation aircraft in the fleet could grow from 7% today to 60% by 2040 as airlines are incentivised to fly more new generation aircraft. This will allow growth within our existing noise limits and share the benefits of quieter aircraft with our local community.

The ATR turboprop aircraft currently operated by Emerald and Loganair already have a lower noise quota count than older jet aircraft and a similar quota count to new generation aircraft. We expect turboprops to continue to play an important role over the Master Plan period.

### Indicative shape of the 5.2km<sup>2</sup> existing noise contour area limit





Aircraft type mix

### Air Noise

This is noise from aircraft that are airborne, landing or taking off and is the main source of noise from an airport. The established and proven measure of community response to air noise is the equivalent continuous noise level during the day (07:00 to 23:00) and night (23:00 to 07:00). This is the measure used in UK aviation noise policy.

In the UK, air noise contours around airports are generally produced for the 92-day summer period (16 June to 15 September inclusive). We publish these as part of our annual reports. Summer contours are used as this is typically the busiest period at airports, and it is also the time of year when people are more likely to have their windows open, be outdoors and therefore be more sensitive to external noise.

We are confident that the forecast passenger growth and increase in flights can be fully accommodated within the existing air noise contour limit.

Taking account of this growth, no property is forecast to be exposed to noise levels above the current trigger for noise insulation, a threshold set in line with UK Government policy. As part of this Master Plan process, we are reviewing some improvements to our current noise insulation scheme in accordance with potential policy changes and against industry benchmarks.

Any improvements would be consulted upon as part of any more detailed proposals outside of the Master Plan process.



### Ground Noise

Ground noise relates to aircraft ground operations and not take off or landing. The main sources of ground noise include aircraft taxiing and the use of Auxiliary Power Units (APU) whilst an aircraft is on a stand.

Ground noise generally only affects areas close to an airport perimeter. At Belfast City there are no residential areas or other noise sensitive land uses close to the perimeter. The busy A2 Sydenham Bypass runs between the airport and the closest homes located in Sydenham. This elevates the ambient noise levels in the area.

No significant effects have been identified within the PER due to changes in ground noise associated with the Master Plan and airfield improvements, including the proposed holding loop or new stands east and west of the terminal.

Ground noise will be reduced by the provision of Fixed Electrical Ground Power (FEGP) at all new stands, avoiding the need for aircraft to employ their APUs, which can be noisy.

### Surface Access Noise

The airport is accessed directly from the A2 Sydenham Bypass which runs between the airport and the nearest residential properties in Sydenham. Road traffic from the airport combines with traffic already using the bypass on a daily basis. The volume of non-airport traffic is noticeably greater, with the effect of airport traffic on overall noise levels from the bypass being limited.

Road traffic access to the airport will remain directly from the A2 and whilst growth will increase trips to and from the airport, non-airport traffic is forecast to remain noticeably greater on the A2. Consequently, no significant noise effects are forecast.

## Air Quality

We implemented our air quality monitoring network in June 2024, which measures the key pollutants of concern. We have eight monitoring stations for nitrogen dioxide (NO<sub>2</sub>) and one for particulate matter (PM<sub>2.5</sub>). Data collected to date shows all concentrations are well within the objective values set by the UK Government.

**We have fitted FEGP on all aircraft stands, reducing the need to use aircraft main engines or their APUs while stationary. This reduces exhaust emissions and odour from burning aviation fuel. Our Airport Operational Instruction strictly limits the use of APUs.**

The greater level of airside and landside activity resulting from the growth to 7mppa could increase concentrations of air pollutants but the increment is very small, with the total concentrations in and around the airport and on the highway network remaining well below the respective objectives.

By 2040, road traffic emissions are expected to reduce due to an increase in electric and hybrid vehicles. The provision of EV charging points within the airport will further promote this change. As described earlier, we also intend to work with local transport providers to facilitate an increase in journeys taken by passengers and staff using public and sustainable transport modes. It is expected that air pollution levels will continue to remain well below statutory objective levels in the period to 2040.

Emissions from aircraft generally have no pronounced effect on air quality beyond the airport boundary. However, we will continue to work with our airline partners to drive further emission reductions and limit unnecessary idling and taxiing on the airfield.



## GREENHOUSE GAS (GHG) EMISSIONS AND CLIMATE CHANGE

A long-term carbon management plan is a key element of our net zero ambition, and we have developed this using approved science-based targets. This is the world's only recognised framework for corporate net-zero target setting in line with climate science.

We intend to develop a combined carbon and air quality management plan, to continually drive emissions reductions and improvements across our operations. We are already working to incentivise airlines to use new generation aircraft, reduce engine taxing (RET) and minimise the need for APUs. We will also continue to work with our airlines to accelerate the uptake of SAF to lower carbon emissions.

In addition, our new construction projects will aspire to meet the highest environmental and sustainability standards; for example, using alternative low embodied carbon products and practices wherever possible.

Between 2019 and 2024, we reduced our Scope 1 and 2 emissions by 44%. We are committed to decarbonising our business and achieving net zero by 2050, with the aspiration to achieve this sooner – Scope 1 and 2 by 2040 and Scope 3 (including aircraft emissions) by 2050. Scope 1 and 2 emissions represent around 2% and 3% respectively, whilst Scope 3 emissions represent around 95%, with the majority of these arising from aircraft operations and travel to and from the airport by passengers and staff.

As the airport grows, there will inevitably be an increase in absolute carbon emissions associated with ATMs. However, on a 'per passenger' basis, emissions should reduce considerably due to the introduction of larger and more fuel-efficient new generation aircraft as well as uptake of SAF.

Overarching policy in relation to carbon emissions from aviation is set at a national UK level. This is linked to the imposition of national carbon budgets and the inclusion of aviation within the UK Emissions Trading Scheme (ETS) and Carbon Offsetting and Reduction Scheme for International Aviation (CORSIA).

In particular, the ETS covers all UK domestic flights and those within the European Economic Area and requires operators to have allowances which will be adjusted downwards with time, in line with the targets set out in the UK Jet Zero Strategy.

Given the nature of Belfast City's market, the vast majority of flights are covered by the ETS and will therefore have to comply with the UK carbon budgets. In addition, there is a requirement for airlines to offset their carbon under the provisions of CORSIA, which covers virtually all other flights from the airport.

Policy is clear that carbon emissions from aviation should be considered at a national level. Limiting carbon emissions at one airport would simply result in the emissions from aircraft being displaced elsewhere and would not contribute to achieving the UK's overall carbon reduction targets.

Analysis by the UK Government in the Jet Zero Strategy, and reiterated by recent airport planning decisions, is clear; it is possible to "*achieve Jet Zero without the Government needing to intervene directly to limit aviation growth*" taking into account plans for growth at airports across the UK.



## **BIODIVERSITY ENHANCEMENT**

There are a range of diverse habitats around the airport site, including the Belfast Lough RSPB Reserve adjacent to the end of the runway.

In preparing our Master Plan we have considered the potential ecological impacts on these natural habitats to ensure that net loss is avoided as a minimum. Further information on this and the opportunities to enhance biodiversity within and around the airport can be found within the PER.

**We are committed to maximising opportunities to make a positive impact on local biodiversity and have delivered positive outcomes through initiatives supported through our Community Fund.**

Future growth will have a strong focus on protecting and enhancing biodiversity. We are exploring options to create onsite biodiversity enhancements to balance any habitat loss, such as increasing grassland plant diversity and providing habitat for insects, amphibians and reptiles in non-operational areas of the airport.



## WATER CONSUMPTION

Our current aspiration is to reduce site water consumption by 50% by 2035. Our Master Plan creates opportunity for the installation of water efficiency measures such as low-flow fixtures, rainwater harvesting systems and water recycling initiatives.

Incorporating sustainable urban drainage innovations (SuDS) will be examined across the airport site to support effective site water management, enhance resilience to flooding and reduce environmental impact of potable water consumption.

Growth will create increased demand on off-site wastewater treatment infrastructure. We are in regular dialogue with NI Water and other utility providers. Concurrently, we are considering how we can reduce our discharges by better segregation of clean and dirty water on the airfield (e.g. better diversion / containment of run-off containing de-icer) as well as employing dual-flush toilet facilities. Such measures not only reduce the volumes of foul water discharge requiring treatment, but also reduce the energy and carbon involved in such treatment.



## WASTE MANAGEMENT

Total waste generation at the airport reduced by over 20% between 2017 and 2024. Currently, only 4% of our waste goes to landfill.

We are examining how we can achieve an overarching target of 'zero waste to landfill' by 2040, with an interim target of 2% by 2030. This will be achieved by further improvements to our recycling programme, accelerated by our investment in new infrastructure.

## Facilitating Sustainable Aviation

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The UK Government SAF Mandate requires airlines to use a minimum of 10% SAF by 2030 and 22% by 2040.

**We will play our part by providing the infrastructure to facilitate the uptake of SAF. We will also partner and collaborate with industry and airline partners to drive innovation and work to decarbonise the future of flight.**

**ZERO**

**emissions**  
**100% Electric**

**THE HEART OF** *Belfast*

# 7

## IMPLICATIONS OF FAILING TO MEET DEMAND

Belfast City Airport stands ready to enhance Northern Ireland's air connectivity, unlock investment in local infrastructure and increase economic growth and prosperity in a sustainable and responsible way.









**Our growth is not simply about meeting passenger demand, it is about delivering Northern Ireland's Programme for Government and in the process unlocking new opportunities for our people, our businesses, and our communities.**

With the ability to expand, the airport can open doors to new destinations, create quality local jobs, and connect Northern Ireland to the global economy like never before. It can help attract new investment, grow tourism, and support the Northern Ireland Executive's vision of a stronger, more prosperous Northern Ireland.



All airports on the island of Ireland will need to plan how to meet the forecast demand; no one airport will be able to do it alone, and where an airport is not able to meet its demand, it is unlikely this capacity could be met elsewhere. Without collective action, Northern Ireland could face fewer destinations, higher air fares, and missed opportunities to build vital international links. This will constrain our regional economy and limit the aspirations of our people.

Northern Ireland has a choice: to seize this opportunity to build a brighter, better-connected future or to allow constraints to limit what we can achieve. By enabling Belfast City to grow sustainably and responsibly, we can ensure that Northern Ireland takes its place on the world stage and delivers a better future for the next generation.

## Without Master Plan Delivery

-  **Restricted international air connectivity**
-  **Reduced economic productivity**
-  **Higher air fares for passengers**
-  **Less job creation**
-  **Limited route network and fewer flight destinations**
-  **Hampered foreign direct investment**
-  **Unmet air travel demand**
-  **Damage to tourism and wider economy**

## With Master Plan Delivery

-  **Enhanced connectivity to the UK and Europe**
-  **Improved economic productivity**
-  **Competitive air fares for passengers**
-  **An additional 11,300 jobs supported across Northern Ireland**
-  **Boost to GVA of over £755 million for Belfast and almost £0.9 billion across Northern Ireland**
-  **Significant contribution to Northern Ireland's Regional Development Strategy and Programme for Government**
-  **More airlines and wider destination choice for passengers**
-  **Improvement to tourism and wider economy**

# 8

## CONSULTATION SUMMARY

### Consultation and Engagement

In developing this Master Plan, Belfast City Airport undertook a comprehensive consultation and engagement exercise that sought feedback from stakeholders including our local community, elected representatives, businesses, passengers, trade bodies and airlines. We are extremely pleased with the level of engagement and feedback received from all stakeholders during the consultation process.



The consultation on the draft Master Plan ran for a period of eight weeks from 16 September to 11 November 2025. A variety of engagement methods were used, including:

- ✈ Extensive advertising on the airport's social media channels, as well as advertisements in national Northern Ireland media outlets;
- ✈ A dedicated consultation website which received over 2,600 views;
- ✈ Three in-person community engagement events, attended by 110 individuals;
- ✈ A Community News leaflet that was distributed to 75,000 households in the vicinity of the airport;
- ✈ In-terminal surveying of passengers; and
- ✈ Extensive engagement with business leaders and elected representatives.



Representatives from Belfast City Airport meeting with First Minister Michelle O'Neill MLA, deputy First Minister Emma Little-Pengelly MLA and Minister for the Economy Caoimhe Archibald MLA.

A Consultation Report has been published alongside this Master Plan, which provides more details about the methods used and the feedback received, as well as responses to some of the key themes identified.

Overall, the responses to the consultation offered very supportive and positive views on the Master Plan vision to 2040. The Consultation Report includes a full breakdown of the qualitative and quantitative results, which are briefly summarised below:

- ✈️ 72% of the 376 responses received from the public stated support for the Master Plan vision to 2040; and
- ✈️ 95% of the 619 passengers surveyed stated their support for the Master Plan vision to 2040.

There was strong support with respect to the economic growth and job creation, improved air connectivity for Northern Ireland, and more sustainable travel to and from the airport, including the opportunity to become the first rail connected airport on the island of Ireland:

- ✈️ 78% of the public responses and 97% of passengers stated their support of Belfast City Airport's role in meeting Northern Ireland's future connectivity needs;
- ✈️ 79% of the public responses and 90% of passengers stated their agreement that the associated economic and social benefits are significant; and
- ✈️ 78% of the public responses and 91% of passengers endorsed Belfast City Airport's proposed net-zero and green transport initiatives.

Around 23% of the public responses were not supportive of the Master Plan vision. Many of these responses raised concerns with respect to potential impacts of airport growth on the local community and the environment.

The feedback received during the consultation period has been carefully considered in finalising this Master Plan.

In line with Government guidance, the Master Plan outlines a long-term blueprint for growth and is intended to be indicative and subject to future review. Any detailed plans that may come forward during the Master Plan period to 2040 will be subject to further detailed design and assessment and may differ from the illustrative plans shown in this document.



First Minister of Northern Ireland

*Michelle O'Neill, MLA*

“Belfast City Airport is more than just a gateway it is a major part of our economy. It supports hundreds of jobs, boosts local businesses and helps drive tourism.

This Master Plan shows great ambition and a really bold vision for the future. I look forward to seeing how this next chapter unfolds and the positive impact it will have on our people, visitors and generations to come.”



deputy First Minister of Northern Ireland

*Emma Little-Pengelly, MLA*

“The Belfast City Airport Master Plan has the potential to deliver huge benefits for Northern Ireland. Growing a globally and sustainable economy is a priority for us and this plan aligns seamlessly with this as it will drive connectivity and support future economic growth. It will also strengthen our tourism sector, support employment and reinforce Northern Ireland’s position as a great place to work, live, visit and invest in.”



## Concerns about potential scheduling of aircraft movements beyond 21:30

The airport is considering adjustments to its operating hours to allow for some additional scheduled flights beyond the current 15-hour daily window to 21:30 but not beyond the 23:59 limit for delays, or prior to the existing start time of 06:30.

Greater flexibility to operate scheduled flights beyond 21:30 would allow airlines to better serve demand, operate more routes, reduce disruption and cancellations, and ensure that aircraft are correctly positioned for flights the next day.

Any future application to amend the existing controls for additional flexibility for a set period beyond 21:30 would require a detailed assessment of noise impacts which would be fully consulted upon as part of that process. If this were to be approved, the airport would bring forward measures to protect our local community, including:

- ✈ targeted improvements to our existing Noise Insulation Scheme aligned with relevant policy and industry benchmarks; and
- ✈ accelerating the transition to quieter, new generation aircraft by incentivising airlines to operate these aircraft types (or turboprops) on any scheduled movements beyond 21:30.

## Concerns regarding the impact of additional flights beyond current limits

As the airport grows, the current annual aircraft movement limit of 48,000 is likely to be reached by the early 2030s and will need to be increased to allow for the delivery of the Master Plan and its associated benefits.

The rate of growth in annual aircraft movements will be less than passenger growth, increasing from around 31,000 today to around 61,000 in 2040. This is due to an increasing number of future flights being on newer generation aircraft which have more seats than the older generation aircraft. It is expected that the average movement will carry 115 passengers by 2040, compared with 80 today. On a 'per passenger' basis, emissions are likely to reduce as a result.

All forecast growth can be accommodated within our existing noise contour area limit.

Any future application to increase the number of flights would require a detailed assessment of noise impacts that would be fully consulted upon as part of that process. The airport would also bring forward important measures to protect our local community as noted above.

## General concerns that airport expansion goes against environmental priorities and sustainability commitments

The Master Plan can be delivered whilst reducing per passenger emissions due to the increased number of new generation aircraft that are larger and more fuel efficient.

The Master Plan affords an opportunity to incorporate a range of environmental and sustainability enhancements, some of which are not technically feasible or cost effective without growth to 7mppa.

It will also allow further performance improvements, including the potential to meet net zero targets for airport operations up to 10 years earlier than previously planned, along with securing 10% of our 2040 energy needs through onsite renewable generation.

All future growth to 2040 can be accommodated within our existing noise contour area limit, also facilitated by the transition to more cleaner, quieter, new generation aircraft.

We continue to work in partnership with Translink to explore the opportunity for Belfast City Airport to become the island's first rail connected airport. We will also collaborate with industry on the 'Future of Flight' to progress pilot initiatives for end uses of hydrogen, including for airfield operations and zero emission flight. Belfast City Airport is ideally located adjacent to Belfast Port, and its short-haul route network is well suited to the early use of electric and hydrogen fuelled aircraft.



Scan **QR code** to visit the Masterplan website and view the consultation report



# 9

## GLOSSARY OF TERMS

### **All-Island Strategic Rail Review**

A rail review report which sets out 32 strategic recommendations to enhance the rail system in Ireland and Northern Ireland up to 2050.

### **Air Transport Movement (ATM)**

A single aircraft operation, either a landing or a take-off.

### **ANPS – Airports National Policy Statement**

UK Government policy document (2018) that sets out the need for additional airport capacity in the Southeast of England and provides the framework for planning decisions.

### **Apron**

The area of an airport where aircraft are parked, loaded, unloaded, refuelled, and maintained.

### **Auxiliary Power Units (APUs)**

A small turbine engine in an aircraft that provides electricity to aircraft while they are parked at a gate.

### **Belfast Harbour Estate**

A large, 2,000-acre area that encompasses Belfast Harbour, Northern Ireland's primary maritime gateway and a key logistics hub and home to a diverse community of businesses, residential areas, and commercial real estate.

## **CGI**

Computer-generated imagery (CGI) is a specific-technology or application of computer graphics for creating visual representations.

## **Community Fund**

A Belfast City Airport initiative that provides financial support to local projects promoting education, environment, and social inclusion.

## **CORSIA – The Carbon Offsetting and Reduction Scheme for International Aviation**

A global market-based measure developed by the International Civil Aviation Organization (ICAO) to reduce carbon emissions from international flights. It requires airlines to offset their emissions above a certain baseline, encouraging the use of carbon credits and sustainable aviation fuels.

## **Decarbonisation**

Reduction or elimination of carbon dioxide emissions from a process such as manufacturing or the production of energy.

## **Demand Projections**

A forecasting exercise undertaken to predict future passenger demand for flights.

## **DfE – Department for the Economy (Northern Ireland)**

Government department responsible for economic policy, including aviation and air connectivity.

## **DfI – Department for Infrastructure (Northern Ireland)**

Government department responsible for planning agreements, transport, and infrastructure in Northern Ireland.

## **ESG**

Refers to the Environmental, Social, and Governance factors that investors measure when analysing a company's sustainability efforts from a holistic view.

## **ETS – (UK) Emissions Trading Scheme**

A “cap and trade” system where a cap is set on the total amount of greenhouse gas emissions allowed from participating sectors, and businesses can trade allowances within that cap. This creates a carbon price, incentivising businesses to reduce their emissions.

## **Feasibility Study**

An assessment conducted to determine the likelihood of a project's success.

## **Fixed Electrical Ground Power (FEGP)**

A system that provides electricity to aircraft while they are parked at a gate, eliminating the need for the aircraft's APU.

## **Foreign Direct Investment (FDI)**

Investment in an enterprise operating in a foreign economy, where the purpose is to have an ‘effective voice’ in the management of the enterprise.

## **Future of Flight**

The ongoing development and integration of new aviation technologies and business models, aiming to create a more sustainable, efficient, and connected future for air travel and transportation.

## **GVA – Gross Value Added**

A measure of the economic contribution of a business or sector to the wider economy.

## **HVO – Hydrotreated Vegetable Oil**

A sustainable, fossil-free diesel alternative produced from renewable feedstocks like vegetable oils, animal fats, and used cooking oil.

## **Inbound Visitor**

Individuals who travel to Northern Ireland from other parts of the UK and beyond for leisure, business, or other purposes.

## **Jet Zero Strategy**

UK Government strategy (2022) outlining how the aviation sector will achieve net zero emissions by 2050.

## **LED lighting**

A type of solid-state lighting technology that emits light when an electrical current passes through it. LEDs are known for their energy efficiency, long lifespan, and versatility in terms of size, shape, and colour.

#### **Master Plan**

A comprehensive document outlining the long-term vision, design concept, and structure for the development of a specific area or project.

#### **MBU – Making Best Use (Policy)**

Policy encouraging airports to maximise capacity using existing runways before new runways are considered (DfT, 2018).

#### **MPPA – Million Passengers Per Annum**

The total number of passengers using the airport on an annual basis.

#### **Multi-modal Forecourt**

A forecourt that facilitates the needs of various transportation options to include bus, taxis and private car pick-up and drop-offs as well as offering complementary convenience and drive through opportunities such as retail and EV charging.

#### **Modal Shift**

Moving away from high-emission vehicles in favour of greener alternatives such as public transport, cycling, or walking.

#### **Net Zero**

A state where greenhouse gas emissions are balanced by removal or offsetting, with the UK target set for 2050 (some airports are also targeting earlier dates for their own operations).

#### **New Generation Aircraft**

A new aircraft type that is noticeably quieter compared to older versions and are also more fuel efficient.

#### **Noise Contour**

Noise contours are contour lines used to help represent noise exposure across large geographical areas. Noise contours are similar to those found in topographical maps; except they are drawn to highlight areas with similar noise levels rather than elevation.

#### **Noise Quota Count System**

A method used to manage and limit aircraft noise, often applied at night. It works by assigning a “quota count” value to each arrival and departure by an aircraft type based on its noise levels, and then setting an overall noise quota (or budget) for the airport.

#### **Outbound Traveller**

Northern Ireland residents travelling to other parts of the UK and beyond for a period of less than a year, for leisure, business, or other personal reasons.

#### **Pier**

A long, narrow structure extending from the main terminal building, designed to provide aircraft parking stands and boarding gates for passengers.

#### **PER – Preliminary Environmental Report**

A supporting assessment accompanying the Master Plan that evaluates environmental and socio-economic effects of proposed development.

#### **Planning Agreement**

A legally binding agreement, usually between the applicant or landowner and the local planning authority, to secure specific planning obligations necessary to make proposed development acceptable.

#### **PfG – Programme for Government**

The Northern Ireland Executive’s strategic plan (2024–2027) setting out missions on Prosperity, People, and Planet.

#### **Runway Loop (Holding Loop)**

A taxiway feature at the end of a runway that allows aircraft to queue for departure, improving efficiency and reducing delays.

#### **SAF – Sustainable Aviation Fuel**

Alternative fuel produced from renewable or waste sources, intended to reduce carbon emissions from aviation.

### Scope 1, 2, and 3 Emissions

**Scope 1:** Direct emissions from an organisation's operations (e.g. fuel used by airport vehicles).

**Scope 2:** Indirect emissions from purchased energy (e.g. electricity).

**Scope 3:** All other indirect emissions (e.g. aircraft operations, passenger travel to/from the airport).

### Surface Access Strategy

A surface access strategy outlines how people will get to and from a specific location, such as an airport or other large facility, using ground transportation options. It focuses on ensuring efficient, sustainable, and convenient access for both passengers and staff.

### SuDS – Sustainable Drainage Systems

Water management systems that replicate natural processes to reduce flood risk and improve water quality.

### Sustainability

Meeting the needs of the present without compromising the ability of future generations to meet their own needs.

### Taxiway

A designated path used by aircraft to taxi between

runways and other airport facilities like terminals, hangars, and aprons.

### Union Connectivity Review

A detailed review into how transport connectivity across the UK can support economic growth and quality of life in England, Scotland, Wales and Northern Ireland.

### UK Carbon Budgets

The UK sets legally binding carbon budgets, which are five-year limits on greenhouse gas emissions, to guide its progress towards its net-zero target by 2050.

### Waste Water Treatment Infrastructure

Encompassing the systems and processes used to collect, treat, and safely return wastewater to the environment.

### York Aviation

An aviation consultancy firm providing economic impact analysis, including studies for Belfast City Airport.

Belfast City Airport's Sustainability Strategy can be found here:

[www.belfastcityairport.com/getattachment/b86de1ec-cb53-44f2-919b-4efb4f47305a/Belfast-City-Airport-Sustainability-Strategy.pdf](http://www.belfastcityairport.com/getattachment/b86de1ec-cb53-44f2-919b-4efb4f47305a/Belfast-City-Airport-Sustainability-Strategy.pdf)

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## CHAPTER 2

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- 10 Department for the Economy (2024). *Northern Ireland Aviation and Air Route Development Strategy – Review of Air Connectivity*. Belfast: Department for the Economy

## CHAPTER 4

- 11 Belfast City Airport (2024). *Sustainability Strategy*. Available at: <https://www.belfastcityairport.com/getattachment/b86de1ec-cb53-44f2-919b-4efb4f47305a/Belfast-City-Airport-Sustainability-Strategy.pdf?lang=en-US>





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