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Initial feedback on the increase
in **TSBA** for March 2025: decline
in competitiveness of **French air
transport**



This study examines developments in the air transport economy in France since the implementation of the latest tax increase on 1 March 2025. This latest increase concerns the solidarity tax, also known as TSBA, whose revenue has been raised by €850 million annually for commercial aviation. This increase has an impact on air transport operators, adding to other factors that also influence the sector's economy. For example, France's lower economic growth compared to other European countries tends to slow down air transport activity. Conversely, a drop in fuel prices (kerosene) tends to reduce prices and boost activity. Despite the difficulty in identifying the specific effect of the tax increase on the economic activity of air transport in France, the latest increase has undoubtedly had an impact on passenger prices, costs for airlines and a slowdown in air traffic, given the developments observed in the second and third quarters of 2025. Furthermore, the French flag carriers in commercial business aviation experienced a sharp decline in the third quarter. Ultimately, air transport in France can be experiencing 'sluggish' growth since the last TSBA increase, unlike the rest of Europe.

Increase in TSBA in March 2025 in France, positioning France among the European countries with the highest air transport taxes

TSBA revenues are estimated at around €1.3 billion for a full year. 20% of these revenues are paid to the AFITF (« French transport infrastructure financing agency – AFIT ») to finance infrastructure other than airports, particularly roads and railways, and 80% to the French government's general budget. The increase in TSBA in March 2025 is equivalent to +€4.77 for an economy class flight ticket from France to Europe (including domestic flights in France), and up to +€120 for a business class flight ticket over 5,500 km. The increases are higher for business aviation, ranging from €207.37 to €2,097.37 per passenger. When all taxes are combined, annual revenue for the French state will exceed €3 billion in 2025. France is thus among the European countries with the highest air transport taxation, along with Germany, the Netherlands, the United Kingdom and Denmark. Countries such as Spain (not mentioned in the table below) do not have taxes on airline tickets.

Tax on airline tickets in €/passenger in 2025 (excluding safety and security taxes) and change in rates compared to 2024

Foreign currency exchange rates/€ - July 2025

	Autriche	Belgique	Allemagne	Danemark	France (TAC)	France (TSBA)	Grèce	Italie	Pays-Bas	Norvège	Portugal	Royaume-Uni
Europe classe économique	12	5	15,5	4	5,14	7,4	3	6,5	29,4	5,0	2	15,1
Évolution tarif taxe 2025/2024 %	0%	150%	0%	nouveau	1,8%	181%	-75%	0%	0%	3%	0%	0%
Europe classe affaires	12	5	15,5	4	5,14	30	3	6,5	29,4	5,0	2	32,5
Évolution tarif taxe 2025/2024 %	0%	150%	0%	nouveau	1,8%	48%	-75%	0%	0%	3%	0%	5%
International moyen-courrier classe économique	12	5	39,3	33	9,25	15	3	6,5	29,4	28,7	2	104,4
Évolution tarif taxe 2025/2024 %	0%	150%	0%	nouveau	1,8%	100%	-75%	0%	0%	3%	0%	0%
International moyen-courrier classe affaires	12	5	39,3	33	9,25	80	3	6,5	29,4	28,7	2	250,6
Évolution tarif taxe 2025/2024 %	0%	150%	0%	nouveau	1,8%	27%	-75%	0%	0%	3%	0%	9%
International long-courrier classe économique	12	5	70,8	40	9,25	40	3	6,5	29,4	28,7	2	109,2
Évolution tarif taxe 2025/2024 %	0%	150%	0%	nouveau	1,8%	433%	-75%	0%	0%	3%	0%	0%
International long-courrier classe affaires	12	5	70,8	40	9,25	120	3	6,5	29,4	28,7	2	259,8
Évolution tarif taxe 2025/2024 %	0%	150%	0%	nouveau	1,8%	90%	-75%	0%	0%	3%	0%	8%

Source : DGAC/DTA/SDE/SDE3

TSBA increase equivalent to an additional 2 points of inflation on ticket prices

The increase in TSBA tariffs is one of several factors (fuel prices, changes in various costs, competition between carriers on a given route, seasonality of supply and demand, etc.) that contribute to price changes. The increase in TSBA rates has been passed on largely, if not entirely, to air transport prices, representing up to 2 additional points of inflation. This price increase comes at a time when overall inflation is under control at the national level. The price increase is also more significant within mainland France, where traffic has been declining since 2023 due to the combined effect of multiple social, political and environmental factors. Prices for long-haul destinations are less affected, whether international or French overseas departments and territories.

From the second quarter of 2025, the number of seats available on flights departing from France will increase by +1.5%, compared with +4.5% in the rest of Europe

Seat capacity departing from France will increase by three points less than in the rest of Europe starting in the second quarter of 2025 (+1.4% in France, +4.7% in Europe for scheduled flights). This difference affects the three main geographical areas departing from France: domestic, European and international (outside Europe). This weak momentum in French air transport comes in a post-Olympic context, where a 'rebound' in international tourism could be expected, based on experience from previous Olympic Games around the world.

Many carriers are affected, across all travel segments and all categories of airports. The growth differential is evident in almost all other European countries, except for Russia and Norway. France now ranks sixth in Europe in terms of overall seat supply. While Turkey's supply was already catching up before the measure was introduced, the evolution of supply in other countries did not appear to differ significantly from that of France. With approximately 22.8 million seats available in July-August 2025, summer supply in France is experiencing sluggish growth compared to 2024, while other major European markets are seeing significant increases.

In this context, Air France, easyJet and Ryanair (the three main carriers in France) have adjusted their commercial offerings in different ways, notably by reducing their offerings in France in the case of the two low-cost carriers.

21.8% decline in French flag aircraft in commercial business aviation in Q3 2025

In commercial business aviation, the number of movements remained stable in the third quarter 2025, but the French flag experienced a 21.8% decline in activity, from 2,600 movements (Q3-2024) to 2,000 (Q3-2025), while the foreign flag grew by 4% during the same period.



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