Population projections at regional level

Statistics Explained

Data extracted in July 2026
Planned article update: July 2030

Highlights

Population is projected to fall in 70% of EU NUTS 3 regions by 2050.

By 2050, the average median age is projected to rise to 50.1 years, an average increase of 3.8 years across all regions.

Projected relative population change, 2025–2050, by NUTS 3 regions
Source: Eurostat (proj_25rp5 and proj_25np)

This article describes the results of the latest population projections of regional demographic patterns across the 27 European Union (EU)countries . It presents a concise summary of the results at regional NUTS level 3 based on the Eurostat Population Projections 2025-based — EUROPOP2025. The Joint Research Centre, with support from Eurostat , produced these projections applying an updated methodology that builds on the approach developed for the EUROPOP2019 projection round.

These regional population projections use population and vital events data up to 2024 and follow the NUTS 2024 classification, which divides the economic territory of the 27 countries in 1 165 geographical statistical units at NUTS level 3. Although the projections extend to the end of the century, the results in this article focus on 2050 and on the regional level only.

For a presentation of the EUROPOP2025 data at national level, please refer to the article on " Population projections in the EU ".

All results in this article reflect one possible outcome under a hypothetical scenario of partial convergence — first at the level of countries, and then at the level of regions converging towards their national values. Every result should therefore be read with the implicit qualifier "*according to a scenario of partial convergence, . . .*"

Population changes across regions

Population is projected to decline in 7 out of 10 regions between 2025 and 2050

Of the 1 165 NUTS level 3 regions shown in Map 1, population in 836 regions (71.8%) is projected to be lower in 2050 than in 2025, while 329 regions (28.2%) are projected to have higher populations.

The sharpest relative declines by 2050 are projected along the EU's eastern border, from Finland through the Baltic States to Poland, Slovakia, Hungary, Romania and Bulgaria. Marked declines are also expected along the southern continental border, particularly in Greece, Croatia, southern Italy, Portugal and Spain.

In Germany, several regions are also projected to lose population by 2050, particularly in parts of eastern Germany. By contrast, the largest relative population increases are projected mainly in northern and western Europe, particularly in regions of Sweden, Ireland, France and Spain.

Overall, these projections point to an increasingly uneven demographic landscape across the EU, with some regions facing sustained population loss while others continue to expand.

Map 1: Projected relative population change, 2025–2050, by NUTS 3 regions
Source: Eurostat (proj_25rp5 and proj_25np)

Population projected to decline by at least 15% by 2050 in half of the regions along the EU's eastern border

Figure 1 shows that the direction and scale of projected population change vary considerably across countries. Among countries with 2 or more NUTS 3 regions (all except Luxembourg and Cyprus), only 2 are projected to have no regions experiencing population loss by 2050, and 2 countries are projected to have no growth in any of their NUTS 3 regions. Overall, the current projections indicate that most countries are projected to lose half or more of their regions by 2050.

In Latvia and Lithuania, all 15 NUTS 3 regions are projected to experience population decline by 2050 compared with 2025, with most regions losing at least 15% of their population. In Estonia, all but one region are projected to shrink by at least 10%.

In Poland, Romania and Bulgaria, most regions are projected to see populations declines of at least 15%, while in Finland, Slovakia and Hungary, a majority of regions are also projected to record decreases, generally of more than 10%.

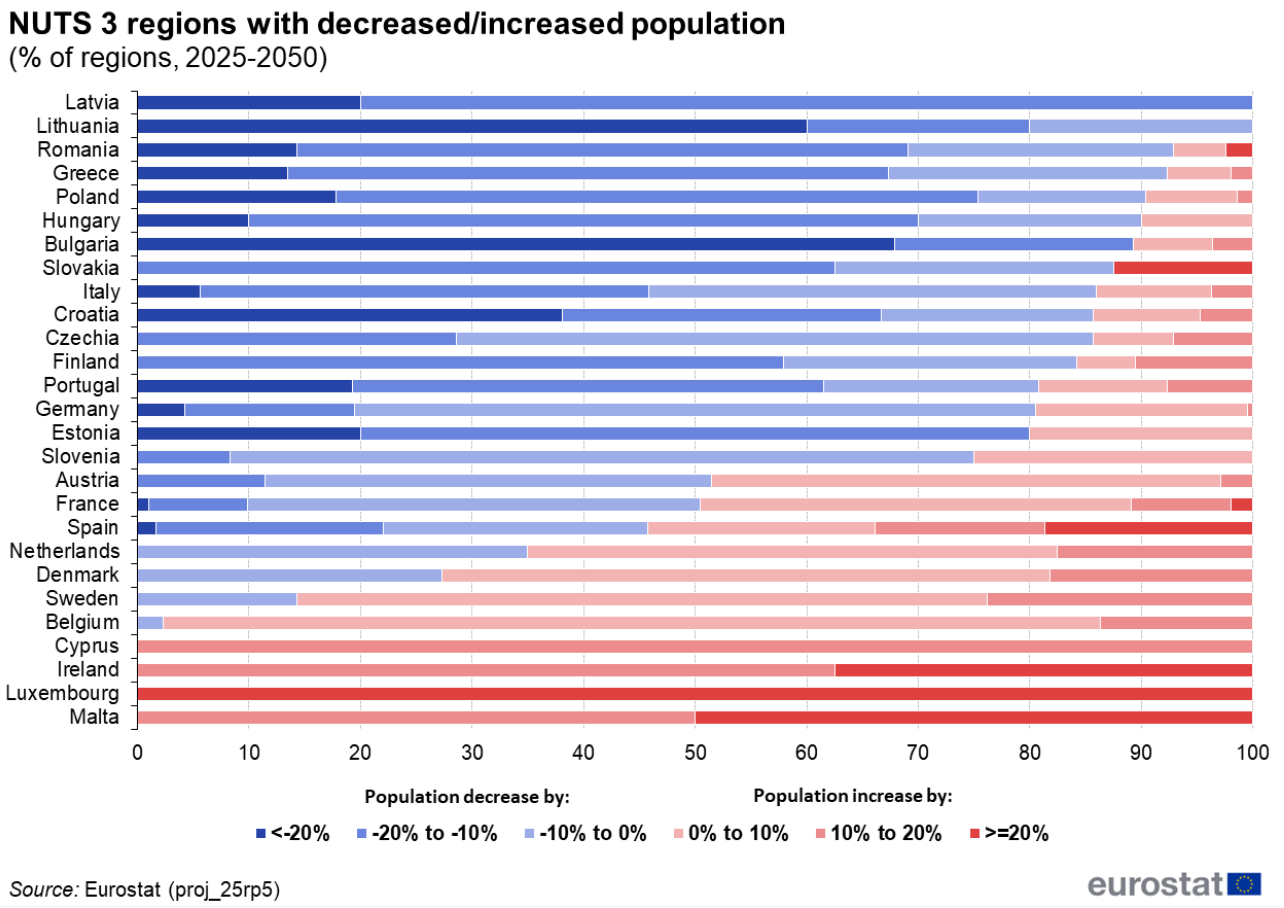


Figure 1: Share of NUTS 3 regions with increased/decreased population, 2025-2050 Source: Eurostat (online data code: proj_25rp5)

In 18 of the 25 multi-regional countries, the population is projected to decrease in the majority of regions by 2050

Among the EU countries with the largest national populations, the number of regions whose population is projected to decline exceeded the number of regions whose population is projected to grow in Germany (324 out of 400 regions), France (52 out of 101 regions) and Italy (92 out of 107 regions).

By 2050, most regions in the 9 EU countries on the eastern border are projected to see population decline, as are more than 80% of regions in Greece, Czechia, Croatia and Portugal.

In Ireland, Malta, Belgium, Sweden, Denmark, the Netherlands and Spain, more regions are projected to see population increases than decreases by 2050. In Ireland and Malta, every region is projected to have higher population in 2050 than in 2025; the same holds for 42 of the 44 regions in Belgium.

In most capital city regions, projected population change is above the national average, either more positive or less negative

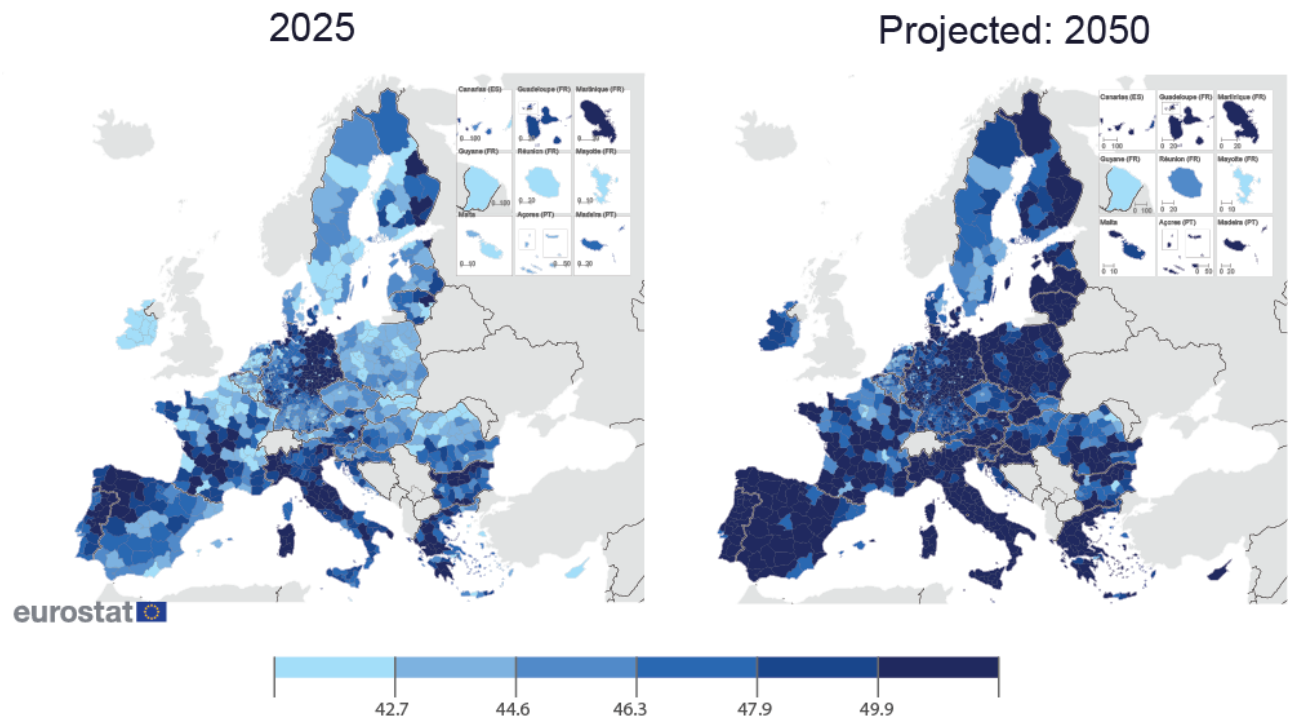
Focusing on capital cities highlights the variation in projected population change within countries. Between 2025 and 2050, the population of the capital city region is projected to increase in 19 of the 25 multi-regional countries. For Madrid (Spain), Malta, Dublin (Ireland) and Bratislavský kraj (Slovakia), this increase exceeds 20%. In 9 countries, the capital city region records the highest projected population change between 2025 and 2050 among all regions in the country — Denmark, Finland, Estonia, Latvia, Lithuania, Slovakia, Slovenia, Croatia and Malta.

By 2050 almost 90% of the capital city regions (22) are projected to have a population change above the national average, with differences ranging from +29.5 percentage points (pp) to -6.8 pp. In 10 capital city regions (in Bulgaria, Czechia, Germany, Estonia, Finland, Croatia, Italy, Portugal, Slovenia and Slovakia), positive projected population change contrasts with a negative national average. Cyprus and Luxembourg, which each have a single NUTS level 3 region, are both projected to have higher populations in 2050.

Population ageing across regions

Median age is projected to increase between 2025 and 2050 in almost all EU regions

Map 2 shows the median age of the population in NUTS 3 regions on 1 January 2025 and 2050. Population ageing over this period is reflected in an unweighted average increase in the median age to 50.1 years by 2050, corresponding to a rise of 3.8 years across all regions.



Map 2: Median age of population, 2025 and 2050, by NUTS 3 regions (years) Source: Eurostat (online data code: proj_25rpind)

Ageing is likely to rise at varying rates across regions. It is projected to be fastest in regions of Lithuania, Poland, Portugal, Spain, Malta and Italy, where the median age could rise by at least 8.0 years between 2025 and 2050. In most regions along the EU's eastern and southern borders, the median age is projected to reach at least 41.4 years, with the vast majority exceeding 50.0 years. Ageing is also anticipated in north-western Europe, although median ages in most regions there are likely to remain below 48.0 years.

By contrast, regions with relatively older populations in 2025 — including many parts of Germany — are projected to age more slowly, resulting in a gradual convergence in median age across regions.

30 regions, mostly in Bulgaria and Germany, are projected to have younger populations, with median age likely to decrease by up to 5.0 years.

By 2050, 9 in 10 regions are projected to have at least one quarter of their population aged 65 years and over

Population ageing can also be measured by looking at the share of specific age groups in the total population or by using age dependency ratios, i.e. ratios between age groups. The share of people aged 65 and over is projected to increase from an average of 23.4% in 2025 to 30.5% in 2050, a rise of 7.2 pp.

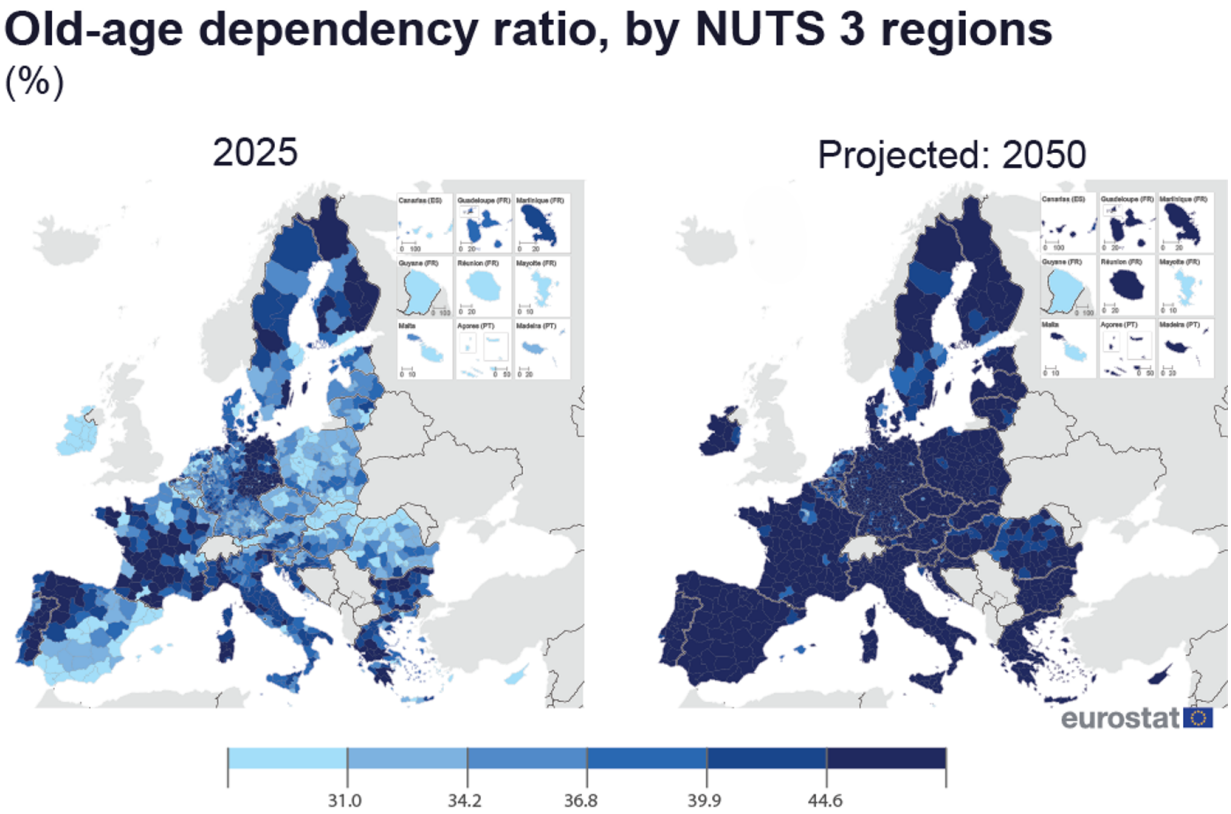
In 2025, nearly 30% of EU regions (357) already had at least one quarter of their population aged 65 or over. These regions were mainly located in Sweden and Finland, extending through to eastern Germany, southern France, Portugal, Spain, central and northern Italy, and across Bulgaria and Greece. By 2050, this share is projected to rise sharply to 90% of regions (1 040).

A similar pattern is projected for population aged 80 years and over as share of the total population. Across all 1 165 NUTS level 3 regions, the proportion of people aged 80 years and over averaged 6.7% in 2025 and is projected to reach 11.8% by 2050, an increase of 5.1 pp.

By 2050, the share of population aged 80 years and over is projected to reach or exceed 13.9% — the highest

regional value observed in 2025 (Evrytania, Greece) — in 246 regions. Most of these regions are located in southern European countries (Greece, Italy, Spain, and Portugal) and in France and Germany. Overall, three quarters of all regions are projected to have at least 10.0% of their population aged 80 years and over by 2050.

The increasing share of older people in the population also has implications for the balance between age groups. These can be assessed using the old-age dependency ratio , which measures the number of people aged 65 years and over relative to the working-age population (aged 15–64 years considered in this article).



Map 3: Old age dependency ratios, 2025 and 2050, by NUTS 3 regions (%) Source: Eurostat (online data code: proj_25rpind)

Map 3 shows the old-age dependency ratio in 2025 and 2050 for all 1 165 NUTS level 3 regions. By 2050, the ratio is projected to exceed 50% in 6 out of 10 regions (710), meaning that there will be one person aged 65 years and over for at most 2 people of working age in these regions.

Across all regions, the combined effect of the projected increase in the population aged 65 years and over and the decline in the working-age population is expected to raise the old-age dependency ratio from a simple unweighted average of 37.6% in 2025 to 54.5% by 2050, an increase of 16.8 pp.

Demographic drivers of projected population change across regions

The EUROPOP2025 regional projections have been estimated on the basis of 5-year age groups, and 5-year intervals. Population change is therefore defined as the difference in the size of a population between the beginning and the end of 5 calendar years. It has 2 components:

- (N) natural change , defined as the aggregated number of live births over 5 years minus the aggregated number of deaths over 5 years, i.e. the change in population due to vital events; and
- (M) net migration , defined as the aggregate number of immigrants minus the aggregate number of emigrants over 5 years.

The direction of population change (positive or negative) depends on the combined effect of the 2 components. Accordingly, all 1 165 NUTS level 3 regions can be classified into 4 main groups based on the combination of natural change and net migration.

- Positive natural change (N+) and positive net migration (M+)
- Negative natural change (N-) and positive net migration (M+)
- Negative natural change (N-) and negative net migration (M-)
- Positive natural change (N+) and negative net migration (M-)

Net migration is the main driver for population growth by 2050 for almost 3 out of 10 regions

Almost one-third of the regions (329 out of 1 165 NUTS 3 regions) is projected to have a higher population in the year 2050 compared with 2025, mainly due to overall positive natural change (group A) or positive net migration (group B).

Positive natural change is projected to be the main driver of population growth by 2050 in just 21 regions (group A). These regions are spread across 6 countries — Belgium, Denmark, France, Germany, the Netherlands and Spain — with more than half of them located in France.

Net migration, the other component of population change, is projected to be the main driver of population growth by 2050 in 308 regions (26.4%), classified in group B. Among multi-regional countries, at least half of the regions are projected to belong to this group in Denmark and Sweden (northern Europe), Ireland, Belgium and the Netherlands (western Europe), and Spain (southern Europe). In Ireland and Malta, net migration is projected to be the main driver of population growth in all regions by 2050. The same is projected for the single-region countries of Cyprus and Luxembourg.

Negative natural change is the main driver for the population decline by 2050 for 7 out of 10 regions

Compared with 2025, the population is projected to decline in 820 regions (70%) by 2050 as a result of natural decrease (group C). In these regions, positive net migration, where present, is not expected to offset the excess of deaths over live births.

By 2050, at least 80% of the regions in 13 EU countries are projected to experience population decline driven by negative natural change. These countries include Finland; the Baltic States; countries in Central and Eastern Europe (Poland, Czechia, Hungary, Romania, Bulgaria); and southern European countries (Greece, Croatia, Italy, Portugal).

For a small number of regions, 16, spread over 7 countries (Slovakia, Romania, Bulgaria, Germany, France, Spain, Greece), the projected decreased population by 2050 is the result of higher negative net migration, which exceeds the natural change (group D).

Population change by group of demographic balance components, 2025-2049

	Group of demographic balance components				Total regions (NUTS 2024)
	A	B	C	D	
Belgium	1	41	2	-	44
Bulgaria	-	3	24	1	28
Czechia	-	2	12	-	14
Denmark	1	7	3	-	11
Germany	3	73	318	6	400
Estonia	-	1	4	-	5
Ireland	-	8	-	-	8
Greece	-	4	47	1	52
Spain	1	31	26	1	59
France	13	36	49	3	101
Croatia	-	3	18	-	21
Italy	-	15	92	-	107
Cyprus	-	1	-	-	1
Latvia	-	-	5	-	5
Lithuania	-	-	10	-	10
Luxembourg	-	1	-	-	1
Hungary	-	2	18	-	20
Malta	-	2	-	-	2
Netherlands	2	23	15	-	40
Austria	-	16	19	-	35
Poland	-	6	67	-	73
Portugal	-	5	21	-	26
Romania	-	3	37	2	42
Slovenia	-	3	9	-	12
Slovakia	-	1	5	2	8
Finland	-	3	16	-	19
Sweden	-	18	3	-	21
Total	**21**	**308**	**820**	**16**	**1 165**

Note: the groups of demographic balance component should be read as follows:
A - Regions with population growth mainly due to positive natural change
B - Regions with population growth mainly due to positive net migration
C - Regions with population decline mainly due to negative natural change
D - Regions with population decline mainly due to negative net migration

Source : Eurostat (online data codes: proj_25rdbal)

eurostat

Table 1: Population change by group of demographic balance components, 2025-2049 Source: Eurostat (online data code: proj_25rbal)

Source data for tables and graphs

- EUROPOP2025 population projections by NUTS 3 regions (NUTS 2024): maps graph and table

Data sources

The EUROPOP2025 subnational population projections were produced for all NUTS level 3 regions in the 25 EU Member States that have more than one NUTS3 region. They are consistent with the national population projections and use the population on 1 January 2025 as the baseline. The projections are based on a set of assumptions about future developments in fertility, mortality and migration.

These projections should not be interpreted as forecasts. Rather, they illustrate how the population would evolve if the underlying assumptions remained unchanged throughout the projection period. In other words, they represent what-if scenarios that describe possible population developments under a specific set of demographic assumptions.

As the projections cover a relatively long time horizon, they should be interpreted with caution. They represent only one of a range of possible demographic futures for the populations of the EU Member States.

The regional EUROPOP2025 projections were produced for all 1 165 NUTS level 3 regions, based on the NUTS 2024 classification (the Nomenclature of Territorial Units for Statistics).

Methodological note

Whether the combined effect of natural change and net migration results in population growth or decline depends on the direction and relative magnitude of these 2 demographic components. The 4 groups (A–D) presented in Table 1 are derived from 8 demographic scenarios, reflecting all possible combinations of positive or negative natural change and net migration, as well as the component that has the greater influence on the overall population change. These scenarios are described below.

1. Positive natural change (N+) and positive net migration (M+):
   a. M+ < N+ : population growth, with positive natural change stronger than positive net migration
   b. M+ > N+ : population growth, with positive net migration stronger than positive natural change
2. Negative natural change (N-) and positive net migration (M+):
   a. M+ > N- : population growth due to positive net migration compensating negative natural change
   b. M+ < N- : population decline due to negative natural change stronger than positive net migration
3. Negative natural change (N-) and negative net migration (M-):
   a. M- < N- : population decline, with negative natural change stronger than negative net migration
   b. M- > N- : population decline, with negative net migration stronger than negative natural change
4. Positive natural change (N+) and negative net migration (M-):
   a. M- > N+ : population decline due to negative net migration stronger than positive natural change
   b. M- < N+ : population growth due to positive natural change compensating negative net migration

From the perspective of population growth or decline, the regions can then be grouped as follow:

A. Regions with population growth mainly due to positive natural change: subgroups 1a and 4b

B. Regions with population growth mainly due to positive net migration: subgroups 1b and 2a

C. Regions with population decline mainly due to negative natural change: subgroups 2b and 3a

D. Regions with population decline mainly due to negative net migration: subgroups 3b and 4a

Context

These regional projections are a disaggregation of the national projections and follow the overall assumption of partial demographic convergence, rather than forming a separate set of projections. Eurostat's national-level population projections assume that socio-economic differences between EU countries will gradually diminish over the very long term. Major demographic indicators are therefore projected to move closer across countries, though not to full convergence — countries are not expected to become identical in their demographic profiles. Instead, countries are assumed to become more similar demographically as socio-economic conditions converge.

View this article online at http://ec.europa.eu/eurostat/statistics-explained/index.php/Statistics_on_regional_population_projections

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Other articles

- Population projections in the EU
- Population statistics at regional level
- Population and population change statistics
- Population structure and ageing

Database

- Population projections - detailed datasets (proj) , see:

Population projections at regional level (2025-2100) - EUROPOP2025 (proj_25r)

Population on 1st January by age group, sex, type of projection and NUTS 3 region (proj_25rp5)

Assumptions for total fertility rates, type of projection and NUTS 3 region (5-year averages) (proj_25raasfr)

Projected life expectancy at birth, by sex, type of projection and NUTS 3 region (5-year averages) (proj_25ralexp)

Demographic balances by type of projection and NUTS3 region (5-year aggregates) (proj_25rdbal)

Population structure indicators by type of projection and NUTS3 region (proj_25rpind)

Thematic section

- Population projections
- Population and Demography overview
- Regions

Publications

- Eurostat regional yearbook — 2025 edition
- Demography of Europe – 2026 edition

Visualisation

- Regional Statistics Illustrated
- Demography of Europe – 2026 edition

Methodology

- Reference metadata - 'Population projections at regional level (2025-2100) - EUROPOP2025
- Population projections in the EU - methodology at

External links

- 2024 Ageing Report. Economic and Budgetary Projections for the EU Member States (2022-2070)
- Ninth Report on Economic, Social and Territorial Cohesion
- Report from the European Commission on the impact of demographic change - 2020
- The impact of demographic change in Europe