



# Monthly Network Operations Report

Overview January 2025



# 1. Summary

In January, there were 745,070 flights, reflecting a 4.9% increase compared to January 2024.

The network had an average of 24,035 flights/day in January, about 1,125 flights/day more than in January 2024. The busiest day was Friday 03 January (27,382 flights), which exceeded the busiest day of January 2024 (26,115 flights). The intra-NM southwest axis saw 5.7% growth compared to 2024 while the southeast axis saw a 5.5% increase, contributing to the overall network growth of 4.9%.

Iceland became the 42nd member of EUROCONTROL on 01 January 2025. This added an average of 266 daily flights to the NM Area.

The conflict in Ukraine still affects overflights in several countries. EUROCONTROL continues to help manage the war's impact on aviation.

In January 2025, compared to January 2024, the Mainline (+7.1%) and Low-cost (+5.5%) segments were the primary drivers of total flight growth in the NM area, collectively adding 997 daily flights.

All Top 20 ACCs experienced increased traffic in January 2025 compared to January 2024.

Ryanair was the busiest operator with, on average, 2,338 movements per day followed by Turkish Airlines (1,396), easyJet (1,012), Air France (899) and Air Lufthansa (880). Six air operators, easyJet, Air France, Pegasus, Finnair, TAP and Eurowings had a double-digit percentage traffic growth compared to last year.

The busiest airport was Istanbul airport (1,376 flights/day) followed by London Heathrow (1,255 flights/day), Amsterdam Schiphol (1,187 flights/day), Paris Charles de Gaulle (1,154 flights/day) and Madrid (1,091 flights/day).

Network departure punctuality was at 72.3% and arrival punctuality was 76.5%, both higher than in January 2024. The network was mainly impacted by airport weather and en-route ATC capacity issues. Domestic routes had a departure punctuality of 80.7%, which was higher than the network level. Punctuality on the south-east axis was 74.2% which is an increase compared to January 2024. Network first rotation departure punctuality was 79.9%, which is an increase of 1.7 p.p compared to 2024. Improving first rotation punctuality remains a key objective for the Network Manager (NM).

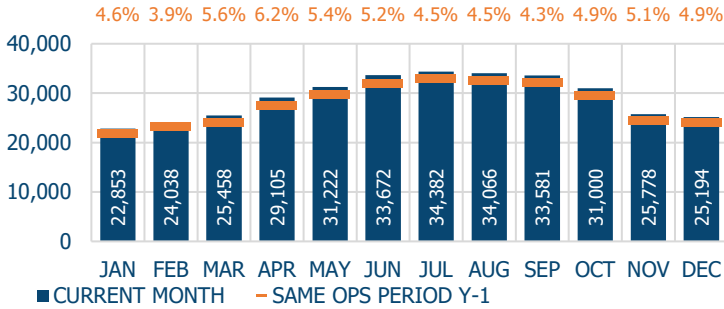
There were 771,585 minutes of ATFM delay in January, a 35.4% increase compared to January 2024. En-route ATFM delay represented 41.6% of these ATFM delays and airport 58.4%. The average en-route ATFM delay per flight for the network was 0.4 minutes in January and remained stable compared to last year. Total airport ATFM delays increased by 63.0% and total en-route ATFM delays increased by 9.5% in January. Airport weather and en-route ATC capacity were the main issues. Seasonal weather conditions, including low visibility, snow, and freezing fog, had a significant impact on operations at Amsterdam Schiphol airport, resulting in a total of 114,357 minutes of ATFM delays. On 24 January, Storm Éowyn caused heavy rainfall and strong winds across Ireland and the United Kingdom. Additionally, Storm Garoe led to disruptions in the Canary Islands, Portugal, and Spain on 21 January.

NM's Operational Centre reduced en-route ATFM delays by 10.8% and airport ATFM delays by 8.8% through direct actions.

NM estimates that 2.6 million tonnes of fuel was burnt in the en-route flight phase in the NM area in January 2025.

## 2. Traffic evolution

Last 12 months average daily traffic

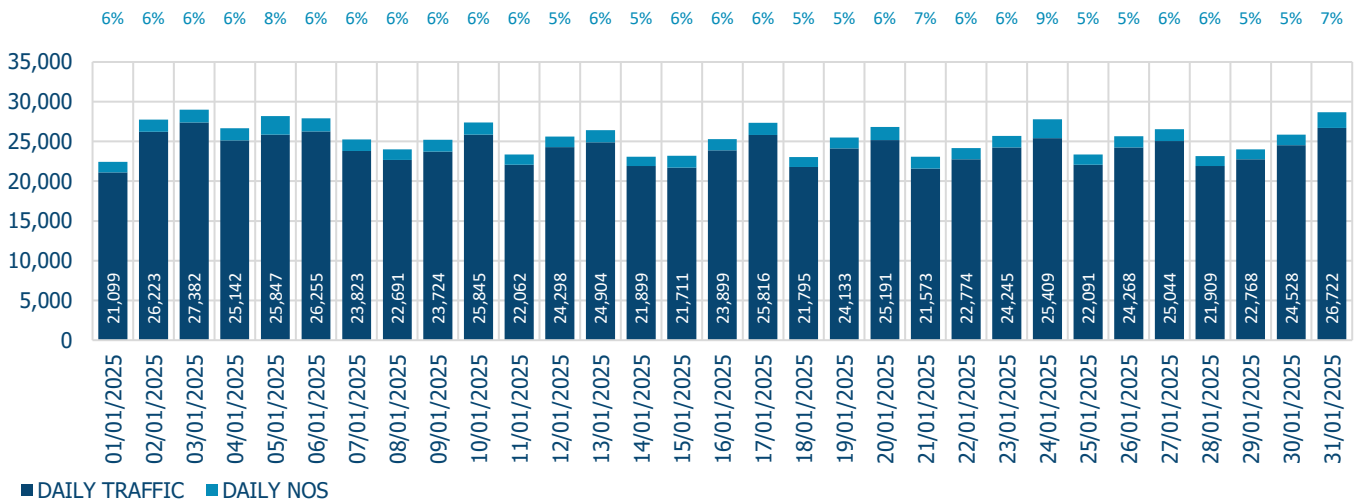


There were 745,070 flights throughout Europe in January 2025, 4.9% up compared to the same period last year.

In January 2025, compared to January 2024, the Mainline (+7.1%) and Low-cost (+5.5%) segments were the primary drivers of total flight growth in the NM area, collectively adding 997 daily flights. This increase was partly due to additional daily flights in Türkiye domestic (+41 flights/day), Germany domestic (+25 flights/day), flows between Italy and Spain-Continental (+24 flights/day), Spain-Continental and Spain Canaries (+24 flights/day), UK and Spain Canaries (+21 flights/day) and UK domestic (+20 flights/day). The Charter experienced the highest growth rate (+13.7%), driven by extra daily flights between Türkiye and the Middle East (+12 flights/day) and between Poland and Egypt (+10 flights/day). Business aviation also saw an increase of 2.7%, adding 41 daily flights, with notable growth in France domestic (+6 flights/day), and flows between France and Italy (+4 flights/day), France and UK (+3 flights/day), France and Germany (+3 flights/day), and Norway domestic (+3 flights/day). The Regional segment declined by -0.4% compared to January 2024, primarily due to a reduction in daily flights on domestic flows in Sweden (-54 flights/day) and Germany (-26 flights/day). The All-cargo segment saw a marginal increase of 0.1% in January 2025. Compared to January 2019, two segments exceeded their pre-pandemic flight levels: Business aviation (+8.3%) and Charter (+8.1%). Total traffic in January 2025 reached 94.3% of the flight levels recorded in January 2019.

The busiest day was Friday 03 January (27,382 flights), which exceeded the busiest day of January 2024 (26,115 flights).

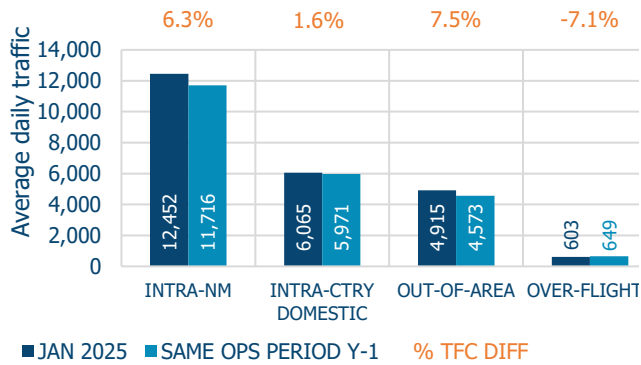
Daily network traffic evolution



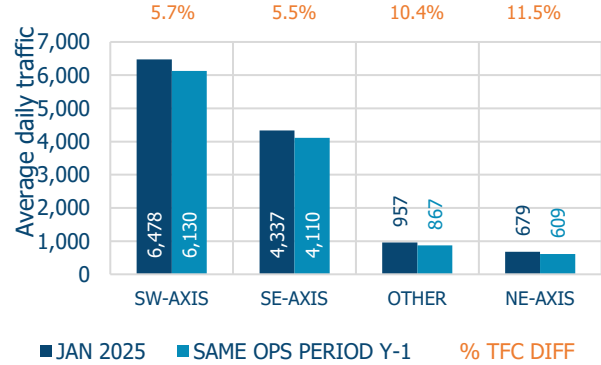
On average, 6.0% of scheduled traffic did not operate in January (see Non-Operated Schedules)

On 5 January, snowfall at Frankfurt airport led to an 8% NOS increase. On 24 January, Storm Éowyn brought heavy rain and strong winds to Ireland and the UK, causing a 9% NOS rise.

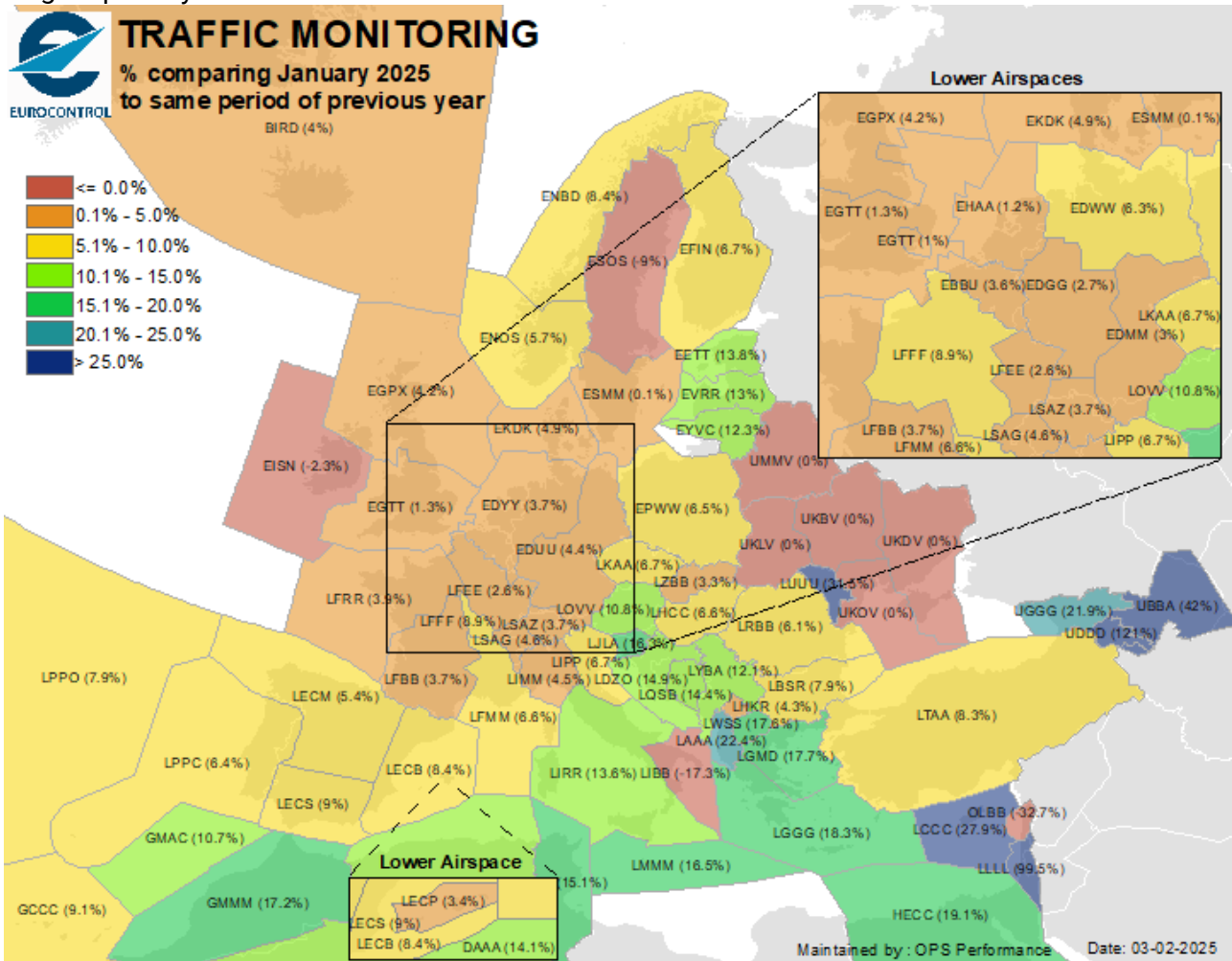
**Traffic per flow**



**Intra-NM daily traffic**

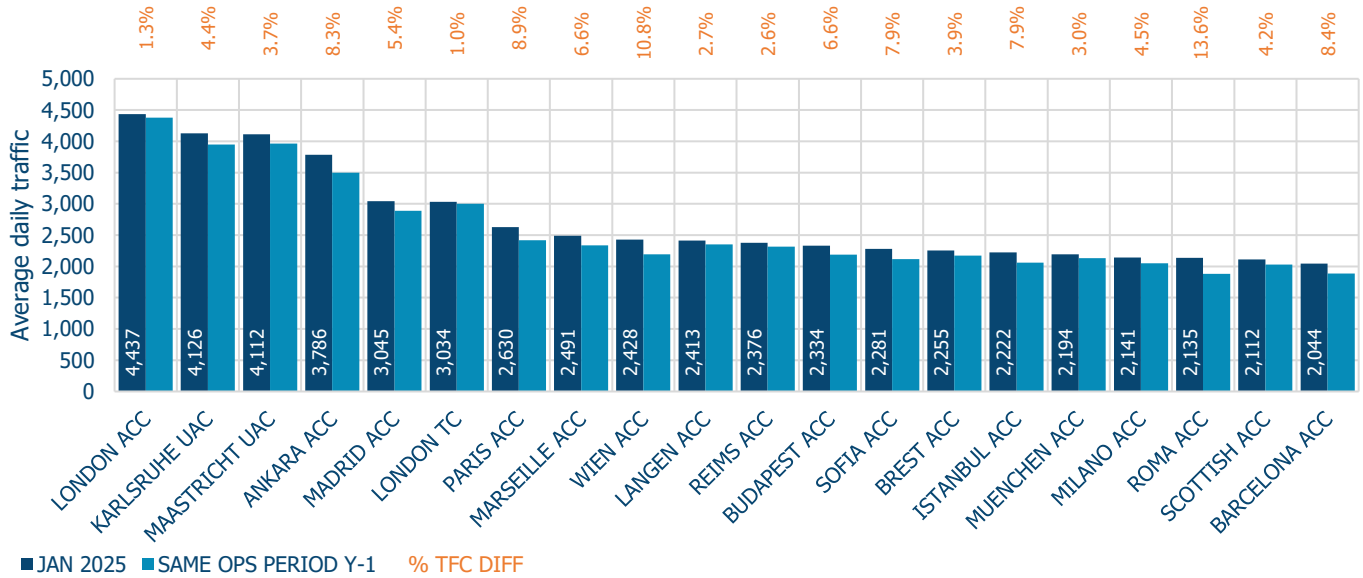


The intra-NM southwest axis saw 5.7% growth compared to 2024 while the southeast axis saw a 5.5% increase, contributing to the overall network growth of 4.9%. Overflight traffic decreased by 7.1% partially due to Iceland joining the NM Area on 01 January, affecting an average of 266 flights per day.



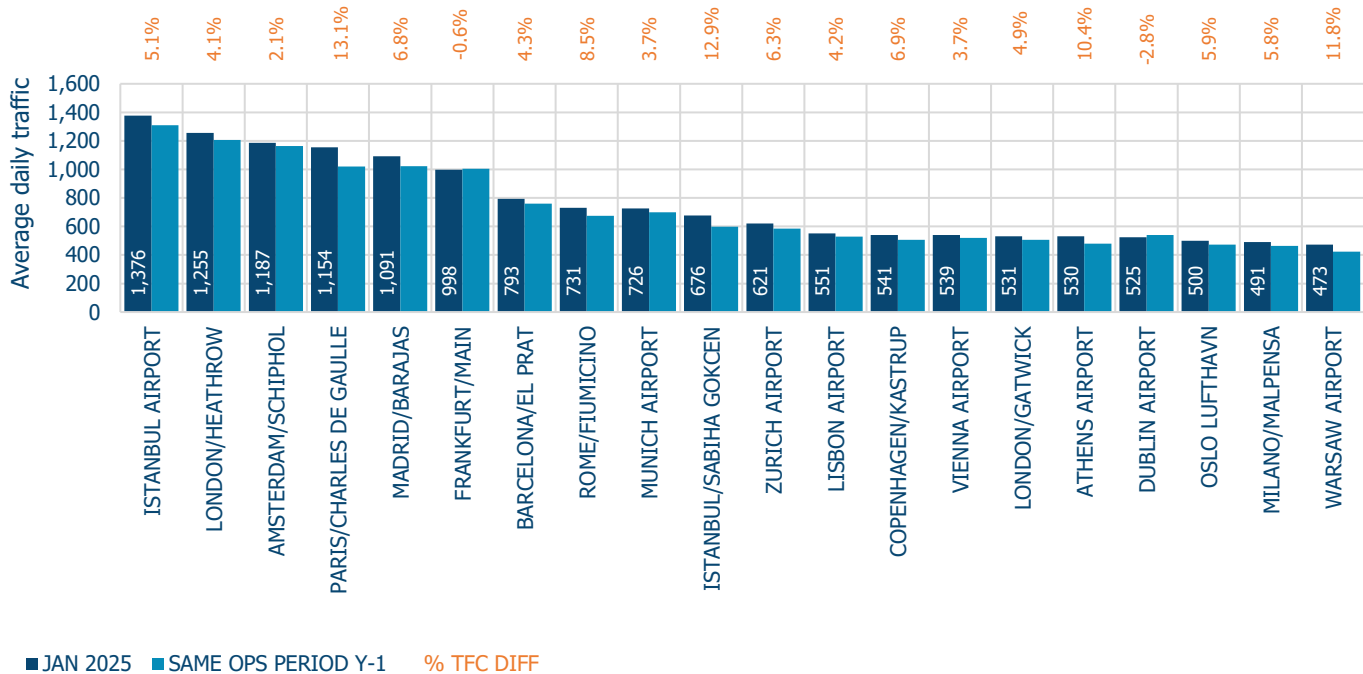
The designations employed do not imply the expression of any opinion whatsoever on the part of EUROCONTROL concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries

## January 2025 | Top 20 ACC daily traffic



London ACC was the busiest ACC followed by Karlsruhe UAC, Maastricht UAC, Ankara and Madrid ACCs. All Top 20 ACCs saw an increase in traffic compared to January 2024. Vienna and Roma ACCs had double digit traffic growth. The strong traffic growth in Vienna ACC was partly accounted for by the relaxation of route restrictions which had previously been protecting Karlsruhe UAC Sector Group South.

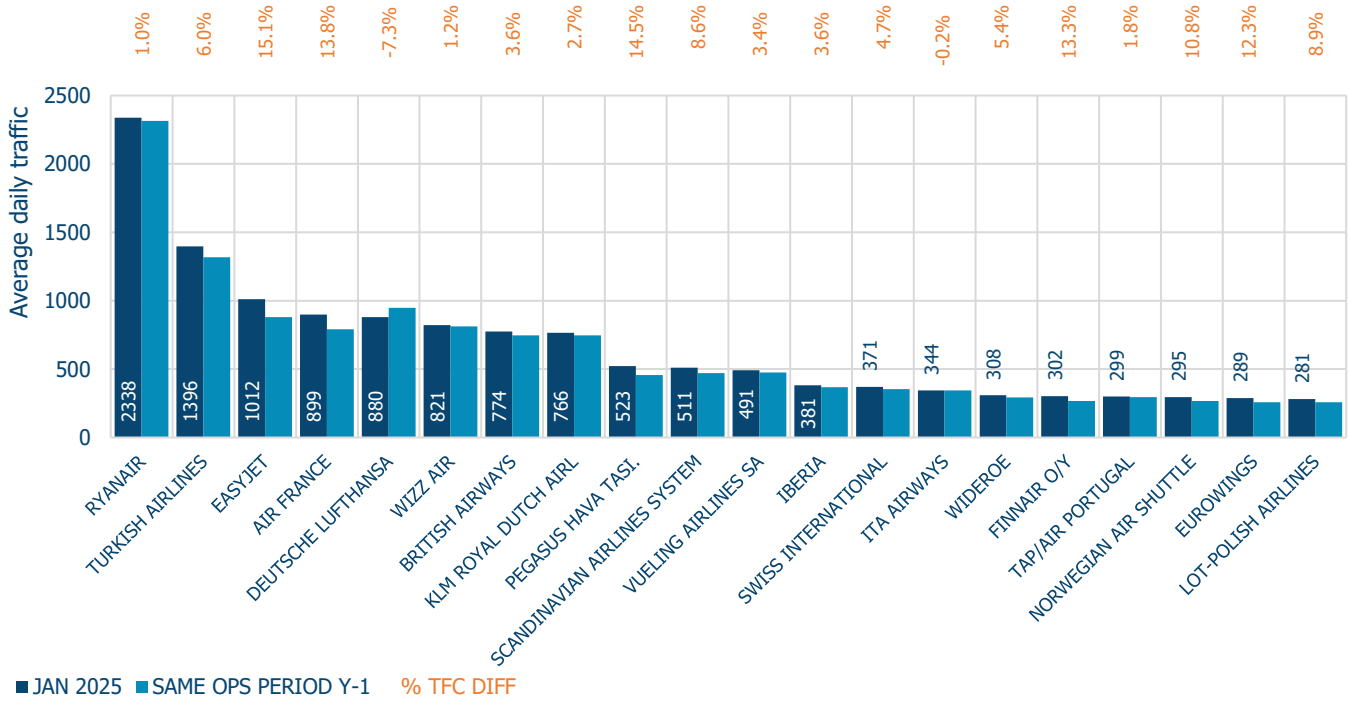
## January 2025 | Top 20 Airports daily traffic



Istanbul Airport was the busiest airport with an average of 1,376 flights per day, followed by London Heathrow (1,255 flights/day), Amsterdam Schiphol (1,187 flights/day), Paris Charles de Gaulle (1,154 flights/day) and Madrid (1,091 flights/day). Frankfurt and Dublin had less traffic compared to the same period last year.



## January 2025 | Top 20 Air Operator groups daily traffic



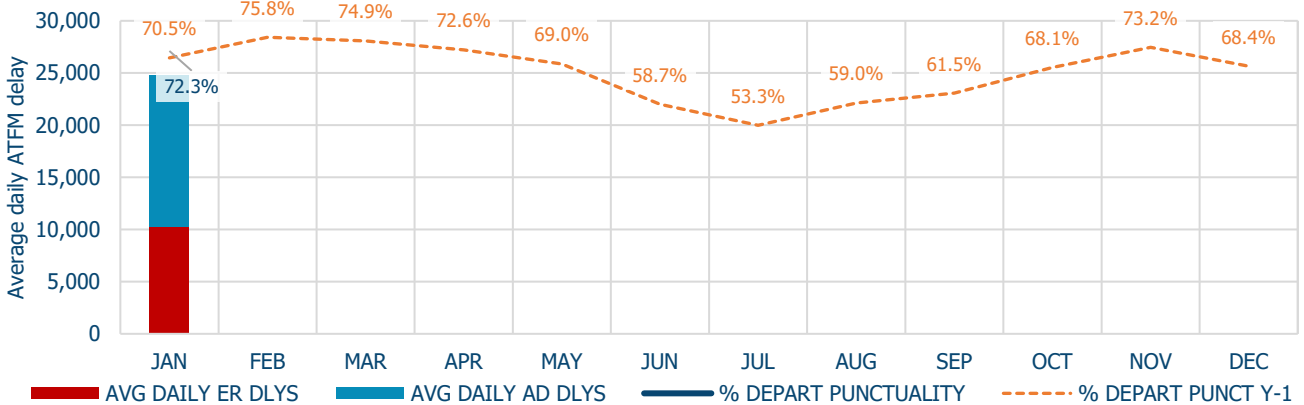
Six air operators, easyJet, Air France, Pegasus, Finnair, TAP and Eurowings had a double-digit percentage traffic growth compared to last year: Pegasus saw the highest increase as new A321neo's joined its fleet.

Ryanair was the busiest operator with, on average, 2,338 movements per day followed by Turkish Airlines (1,396), easyJet (1,012), Air France (899) and Air Lufthansa (880).

## 3. Punctuality

### 3.1 Departure Punctuality

#### Network departure punctuality and ATFM delay



Network departure punctuality (72.3%) was above the level of January 2024 (+1.8 p.p.).

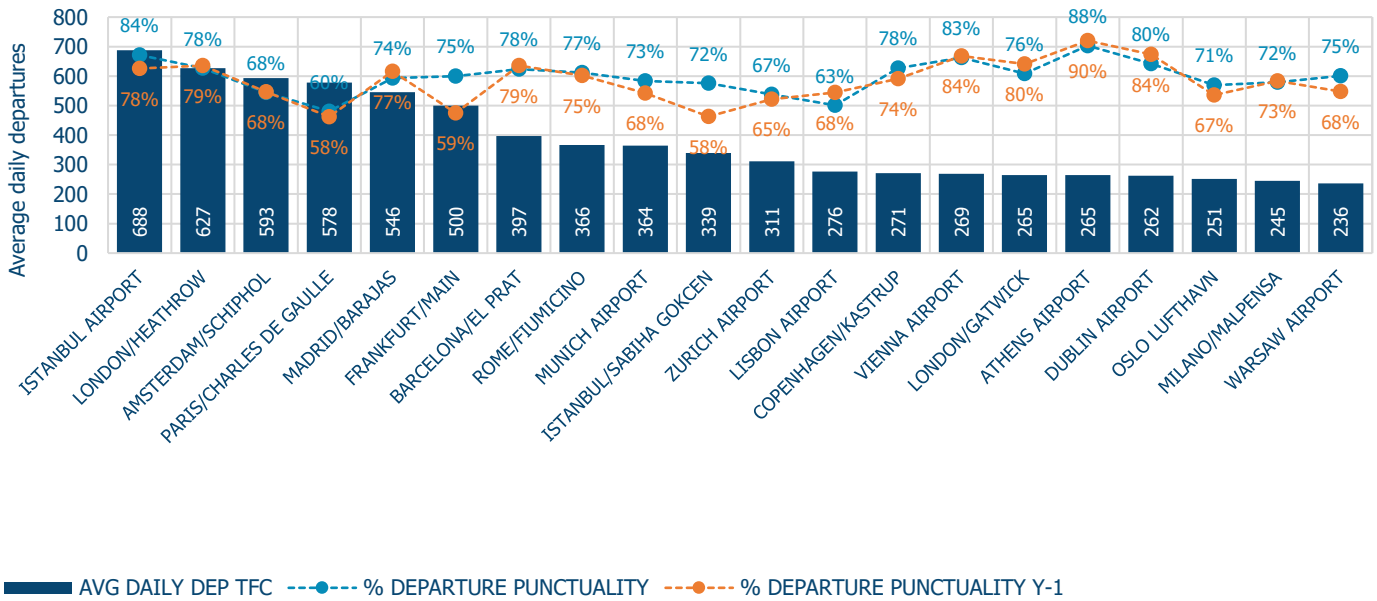
Punctuality on the domestic routes was higher (80.7%) than punctuality at network level. Punctuality on the south-east axis was 74.2% which is an increase of 1.1 p.p. compared to January 2024.

Network first rotation departure punctuality was 79.9% and was higher (1.7 p.p.) than the 2024 level. Improving first rotation punctuality remains a key objective for NM.

\*This view of operational punctuality can be tracked in near real-time by aircraft operator and airport level in the [NORTI Dashboard](#) and in [MIRROR](#). Archived data can be found in the [FATHOM interactive dashboard](#).

The Central Office for [Delay Analysis CODA reports](#) provide further detailed analysis of airline reported delay reasons.

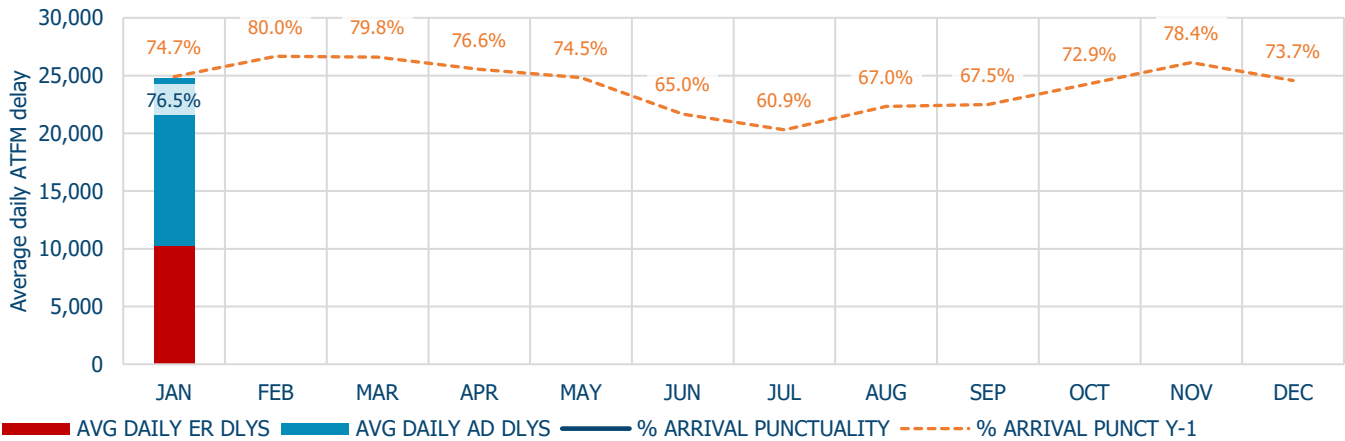
## January 2025 | Top 20 Airport departure traffic and punctuality



Many of the Top 20 airports (by traffic) suffered from seasonal winter weather, such as snow, low visibility and high winds from storms such as Storm Éowyn at the end of the month. Amsterdam was the most impacted during January with multiple days seeing low visibility and snow, with the worst days being 15 and 17 January due to LVP. Frankfurt suffered from snow on 05 January, tower radio frequency issues also caused regulations throughout the month, however punctuality was better than last year where ATC system issues in Langen caused delays between 02 and 09 January 2024.

### 3.2 Arrival Punctuality

Network arrival punctuality and ATFM delay

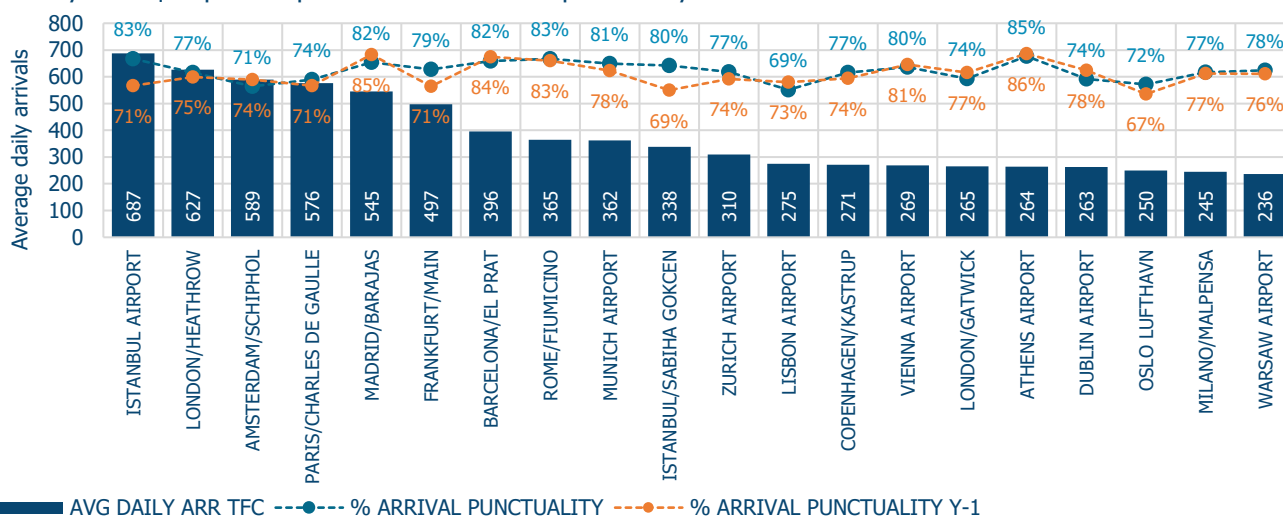


Network arrival punctuality (76.5%) was higher than January 2024 level (+1.8 p.p.).

Domestic routes (81.8%) arrival punctuality was higher than the network level. Punctuality on the south-east axis was 77.0% and increased compared to January 2024 (+ 1.7 p.p.).

First rotation arrival punctuality (84.4%) increased by 3.2 p.p. compared January 2024.

## January 2025 | Top 20 Airport arrival traffic and punctuality



As per the departure section 3.1 above, seasonal weather (mainly low visibility and snow) also influenced airport arrival punctuality during January. Elsewhere in the network, weather also influenced punctuality at London Heathrow mainly due to high winds. Storm Éowyn towards the end of the month caused delays diversions and cancellations impacting UK and Irish airports. Istanbul airport and Istanbul Sabiha Gokcen saw better punctuality compared to January 2024 with improved airport operations due to better seasonal weather.

## 4. Operations

### 4.1 Network Manager

NM continued to support operations affected by the Ukrainian war. It maintained airspace closures and NM systems supporting EU Sanctions Regulation for the Russian Federation and Belarus.

For Tel-Aviv FIR the NM provided a consolidated view of relevant NOTAMs on the NOP Portal and the EUROCONTROL Network Manager Operations Centre (NMOC) continues working 24/7 to implement State required airspace restrictions and in support to daily airline operations for routings and delay mitigation. EASA withdrew the Conflict Zone Information Bulletins (CZIBs) concerning Israel and Iran on 31 January. The CZIB for Lebanon has been extended until 31 March 2025, and for Syrian airspace remains unchanged and valid until 30 April 2025 unless reviewed earlier.

The 2025 NM User Forum took place on 29-30 January 2025 in EUROCONTROL HQ. Organised under the theme “Navigating Summer 2025” the discussions focused on how to best manage the European aviation network in 2025, providing a platform for exchange and discussion on topics important to the network operations, notably:

- Enhanced planning process and next steps
- Pre-tactical planning for Summer 2025, including weather
- Taking advantage of Datalink
- Benefits of disciplined flight plan execution
- Ensuring infrastructure resilience
- Accelerating transformation through technology implementation

The event was well attended with 360 onsite participants from several stakeholder groups: ANSPs, NM and AOs. The discussions elicited recommendations that feed into network operational improvements, coordinated with the stakeholders through the Network Manager CDM working arrangements.

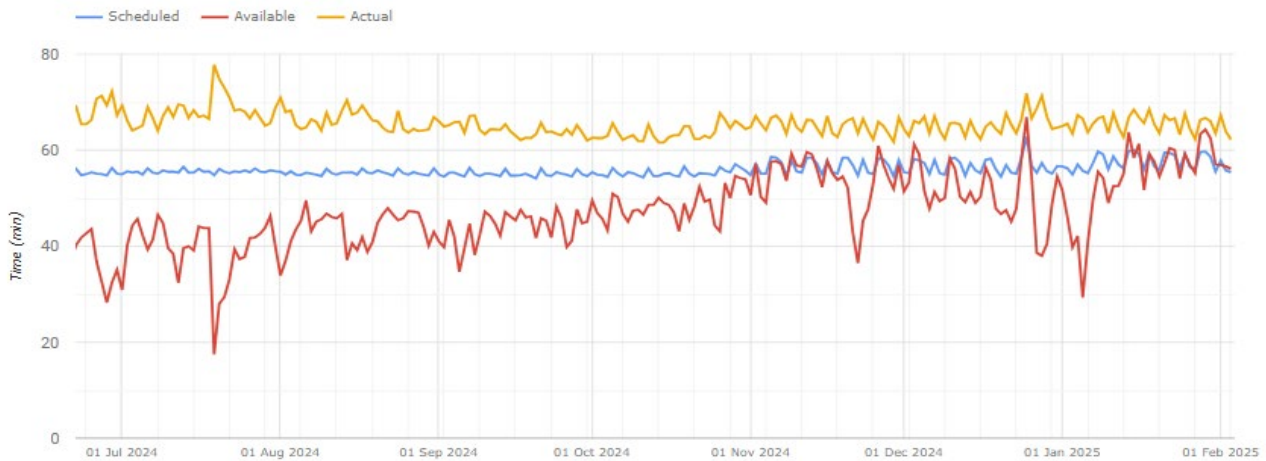
NMOC’s E-Helpdesk received 18,000 requests in January: 13,000 from AOs, 3,000 from FMPs and 2,000 from Towers. 1,700 of these requests were about flights that the AO considered “critical”. The average delay saved per processed request was 26 minutes.

NMOC reduced en-route ATFM delays by 10.8% and airport ATFM delays by 8.8% through direct actions.



## 4.2 Ground

MIRROR's indicator shows that in January the network (average) available turnaround time remained stable compared to January 2024 as punctuality improved, however some weather related disruption at the start of the month (snow in Amsterdam Schiphol, Frankfurt and Manchester, as well as high winds in London Heathrow on 05 January) caused decreases in available turnaround time as reactionary delays built-up. The remainder of the month saw better turnaround time performance.



NM is monitoring TTOT<sup>ii</sup> calculation quality for the 33 A-CDM airports. The average error at a network level was 11.5 minutes and is a decrease of 0.8 minutes as compared to January 2024. Palma de Mallorca (LEPA) presented the lowest error value among the airports – 8.1 minutes. Oslo/Gardermoen (ENGM) notices the highest error value at 15.8 minutes. NM is providing the details of the TTOT error to the A-CDM airports and is working with selected airport operators to improve the TTOT quality.

## 4.3 Network

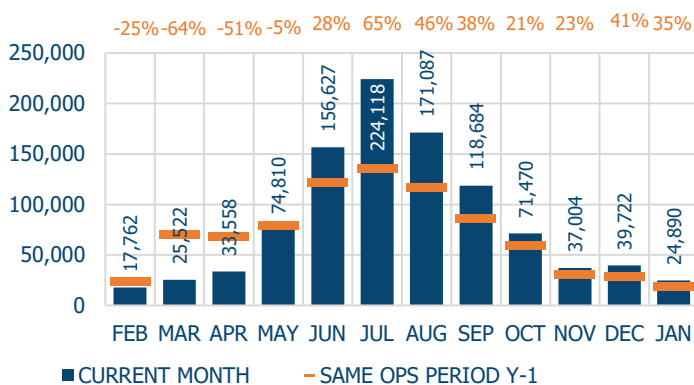
There were 771,585 minutes of ATFM delay in January, 35.4% higher than January 2024.

En-route ATFM delay represented 41.6% of these ATFM delays and airport 58.4%. Most of ATFM delays were due to airport weather and en-route ATC capacity issues.

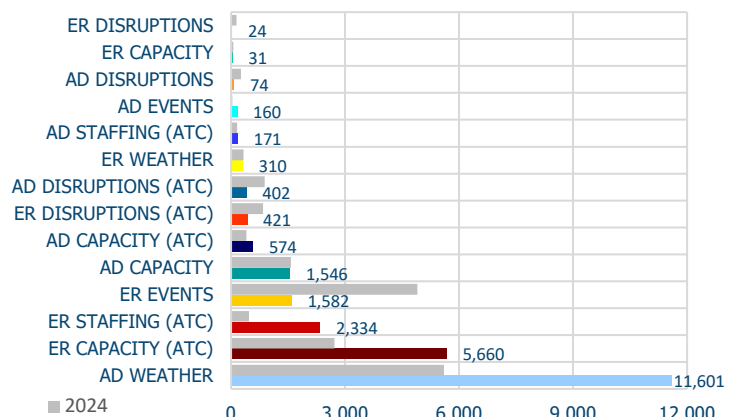
The average en-route ATFM delay per flight for the network was 0.4 minutes in January and remained stable compared to last year.

Network schedule delay was 16.4 minutes/flight in January (16.8 in 2024).

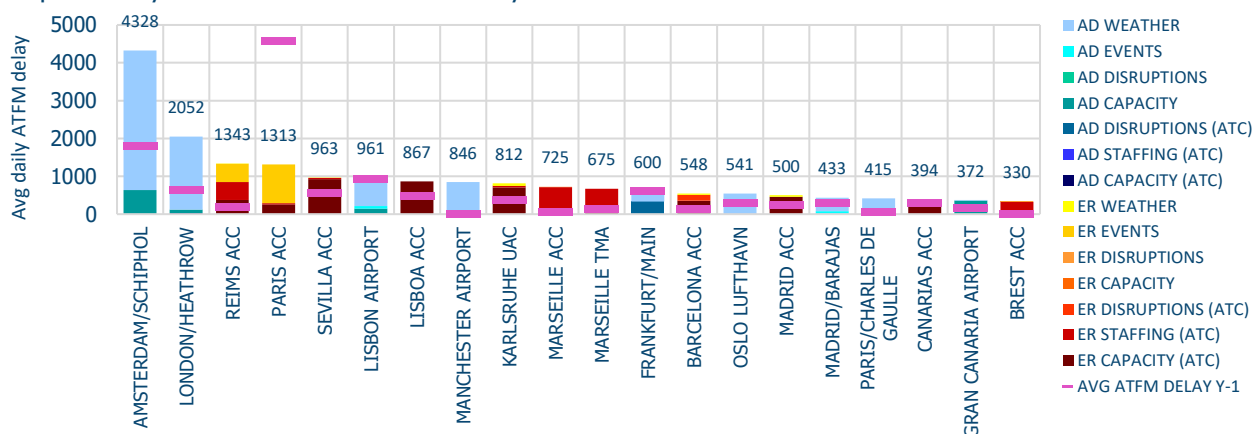
Last 12 months average daily ATFM delays



January 2025 | Reasons for ATFM delays



## Top 20 delay reference locations in January 2025



The chart above shows the Top 20 delay generating locations for the reporting month with respect to total ATFM delays. Figures are the average daily ATFM delays in minutes for the individual locations:

- Seasonal weather - snow, low visibility, freezing fog – at Amsterdam Schiphol airport throughout the month.
- Heavy rain and strong winds due to Storm Éowyn at London/Heathrow airport.
- Storm Garoe led to disruptions at Lisbon airport on 21 January.
- ATC capacity issues in the south-west Axis – Sevilla, Lisbon, Madrid ACCs - due to demand exceeding capacity to/from Canarias Islands.

## 4.4 Significant Events

### Events

- On-going implementation of the new ATM system 4-Flight in Paris ACCs, with capacity reduction of -20% in en-route sectors from 07 January, generated 31,742 minutes of ATFM delays.
- Transfer of airspace below FL195 from Reims ACC to Basel and Strasbourg Approach sectors generated 15,116 minutes of en-route ATFM delay.
- Bordeaux and Brest ACCs have started the training and live trial periods in preparation for the implementation of the 4-Flight system. Details (dates and corresponding capacity reductions) are detailed in the European Transition Plan for major projects 2024-2025. The document is available here [European Transition Plan for major projects 2024-2025](#).
- World Economic Forum Annual Meeting in Davos (Zurich ACC) from 20 to 24 January generated less ATFM delay this year, compared to 2024 (997 min), thankfully to the efficient coordination between the NM and the affected ANSPs.

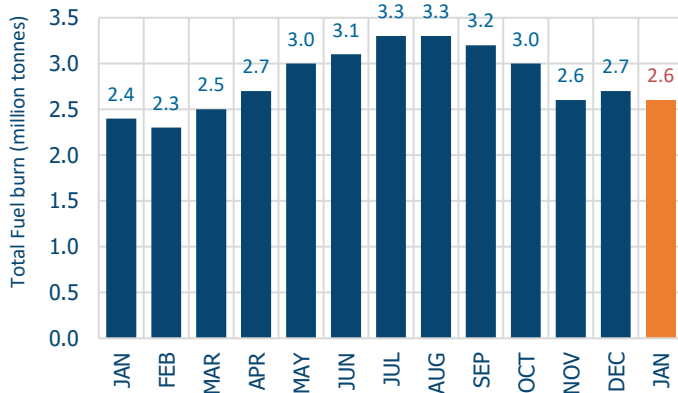
### Technical

- Local radar issues in Valencia TMA throughout the month generated 4,843 minutes of ATFM delay in Barcelona ACC.
- Technical problem with the Air Traffic Management System in Brussels ACC on 30 January led to a zero rate until early evening and generated 7,254 minutes of ATFM delay. 10 flights diverted to alternate destinations.
- Tower radio communication issues at Frankfurt airport from 02 to 15 January generated 10,219 minutes of ATFM delay.

# 5. Flight Efficiency

## 5.1 Fuel Burn

Total fuel burn within NM area (tonnes)

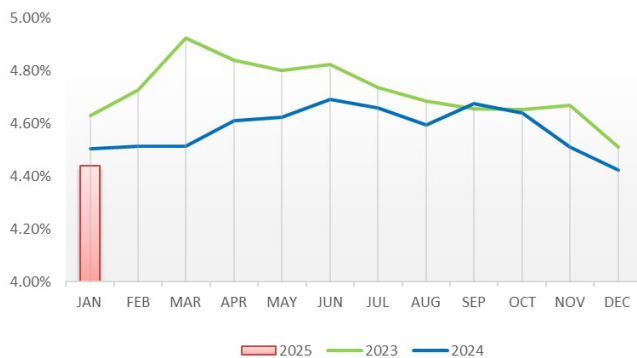


NM estimates that 2.6 million tonnes of fuel was burnt in the en-route flight phase in the NM area in January. This is 8% more narrow body aircraft than 2024 and partially due to Iceland’s inclusion in the NM area, which added, on average, 266 daily long-haul flights more in the NM Area compared to January 2024.

## 5.2 Horizontal Flight Efficiency

There are two horizontal flight efficiency KPIs<sup>iii</sup>. The indicators provide a measure of the average en-route additional distance with respect to the great circle distance. One is based on the last filed flight plan (KEP) and the other on actual trajectory (KEA). KEA and KEP decreased compared to 2024 and 2023 levels.

KEP evolution in NM Area

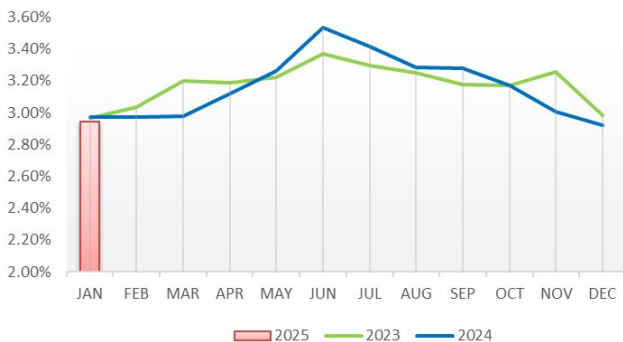


KEP indicator (4.44%) was lower than 2023 and 2024 levels.

Some of the KEP improvement was due to Iceland joining the NM area in January.

NM Flight Efficiency Taskforce continues to support AOs to further improve their flight planning.

KEA evolution in NM Area



KEA indicator (2.95%) was lower than 2023 and 2024 levels

# 6. Notice

## Traffic and Delay Comparisons

All traffic and delay comparisons are between report month and equivalent operational period of the previous year.

## Traffic Monitoring

Country traffic counts are based on arrivals and departures traffic, overflights are excluded.

## NM Area

All figures presented in this report are for the geographical area that is within Network Manager's responsibility (NM area). For further information on the NM Area go to the Reporting Assumptions and Descriptions document available on the EUROCONTROL website at <https://www.eurocontrol.int/network-performance>

## Regulation Reason Groupings

For further information on the NM Area and the regulation reason groupings, go to the Reporting Assumptions and Descriptions document available on the EUROCONTROL website at <https://www.eurocontrol.int/network-performance>

## Airline Groupings

Description and definition available on the EUROCONTROL website at <https://www.eurocontrol.int/directory/airline-groups-lookup>

## ATFM Statistics dashboard

More detailed information available via the [ATFM Statistics dashboard](#)

## FATHOM dashboard

Interactive analysis tool to access archived data [FATHOM interactive dashboard](#)

## Network Operations Analysis document

ATFM statistics provides an alternative source of network traffic and ATFM delays. <https://www.eurocontrol.int/dashboard/air-traffic-flow-management-statistics-dashboard>

And stakeholders can use FATHOM for a more detailed view of their operational performance. <https://www.eurocontrol.int/tool/network-manager-interactive-analysis-tool>

Operational Performance Unit,

Network Management Directorate (NMD),

EUROCONTROL,

96 Rue de la Fusée,

B - 1130 Brussels

mailto: [nm.ops.perf@eurocontrol.int](mailto:nm.ops.perf@eurocontrol.int)

<https://www.eurocontrol.int/network-performance>

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<sup>i</sup> The growth in traffic for Tbilisi and Baku FIRs is partly due to a change in air operators routings resulting from the situation in the Middle East. Brindisi ACC traffic decrease was due to a new sector configuration: The northern sectors of Brindisi ACC are under Roma ACC control since 13 June 2024.

<sup>ii</sup> Target Take-Off Time (TTOT) calculation quality at A-CDM airports is the average absolute difference between ATOT and TTOT at IOBT-30 minutes for non-regulated flights. The metrics follows the latest AICH WG guidance. The 2024 values provided in the current report were recalculated accordingly, securing comparability between the previous and the current year. The TTOT is defined as the earliest TTOT, or if not provided the turn-around TTOT, or else the ATC TTOT; the IOBT is the earliest IOBT.

<sup>iii</sup> More information on KEP and KEA, see [ANS performance page](#).



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