EUROCONTROL

Monthly Network Operations Report

Overview February 2025

CONSORTIUM COORDINATOR sesar DEPLOYMENT MANAGER

FOUNDING MEMBER sesar JOINT UNDERTAKING

NETWORK MANAGER

1. Summary

In February, there were 713,155 flights, reflecting a 5.4% increase compared to February 2024.

The network had an average of 25,470 flights/day in February, about 1,303 flights/day more than in February 2024. The busiest day was Friday 14 February (28,217 flights), which exceeded the busiest day of February 2024 (27,013 flights). The intra-NM southwest axis saw 7.3% growth while the southeast axis saw a 5.6% increase, contributing to the overall network growth of 5.4%.

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

In February 2025[i], the Low-cost segment saw the largest growth, adding 846 daily flights (+11.5%), twice the increase of the Mainline segment, which added 421 daily flights (+4.7%).

All Top 20 ACCs had more traffic in February 2025 compared to February 2024.

Ryanair was the busiest operator with, on average, 2,579 movements (+15.3%) per day followed by easyJet (1,388), Turkish Airlines (1,319), Lufthansa (962) and Air France (933).

The busiest airport was Istanbul airport (1,305 flights/day) followed by London Heathrow (1,285 flights/day), Amsterdam Schiphol (1,266 flights/day), Paris Charles de Gaulle (1,201 flights/day) and Madrid (1,125 flights/day). Istanbul and Munich had less traffic compared to the same period last year.

Network departure punctuality was at 76.5% and arrival punctuality was 81.4%, both better than in February 2024. Domestic routes had a departure punctuality of 83.6%, which was higher than the network level. Punctuality on the south-west axis was 77.4% which is higher than February 2024. Network first rotation departure punctuality was 82.8%, which is 0.6 p.p lower than 2024. Arrival punctuality increased by 0.2 p.p. Improving first rotation punctuality remains a key objective for the Network Manager (NM).

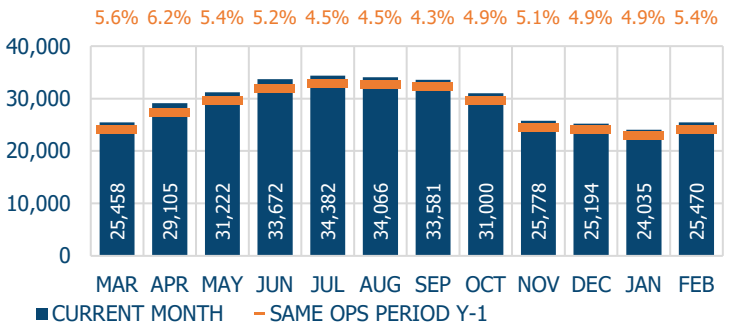
There were 536,049 minutes of ATFM delay in February 2025, a 2.4% increase compared to February 2024. En-route ATFM delay were 57.0% of the ATFM delay and airport was 43.0%. The average en-route ATFM delay per flight for the network was 0.4 minutes in February – a similar level to last year. Total airport ATFM delays decreased by 20.3% and total en-route ATFM delays increased by 30.4% in February. En-route ATC capacity and airport weather were the main issues. ATC capacity issues in the south-west Axis – Sevilla, Lisbon, Madrid ACCs - due to demand exceeding capacity to/from Canarias Islands generated high delays. Additionally, ATC capacity issues in Munich ACC and Karlsruhe UAC were caused by demand exceeding available sectors. Low visibility had a significant impact on operations at Amsterdam Schiphol and Lisbon airports. Strong winds impacted operations at London Heathrow airport throughout the month.

NM's Operational Centre reduced en-route ATFM delays by 15.6% and airport ATFM delays by 8.9% through direct actions.

NM estimates that 2.4 million tonnes of fuel was burnt in the en-route flight phase in the NM area in February 2025.

2. Traffic evolution

Last 12 months average daily traffic

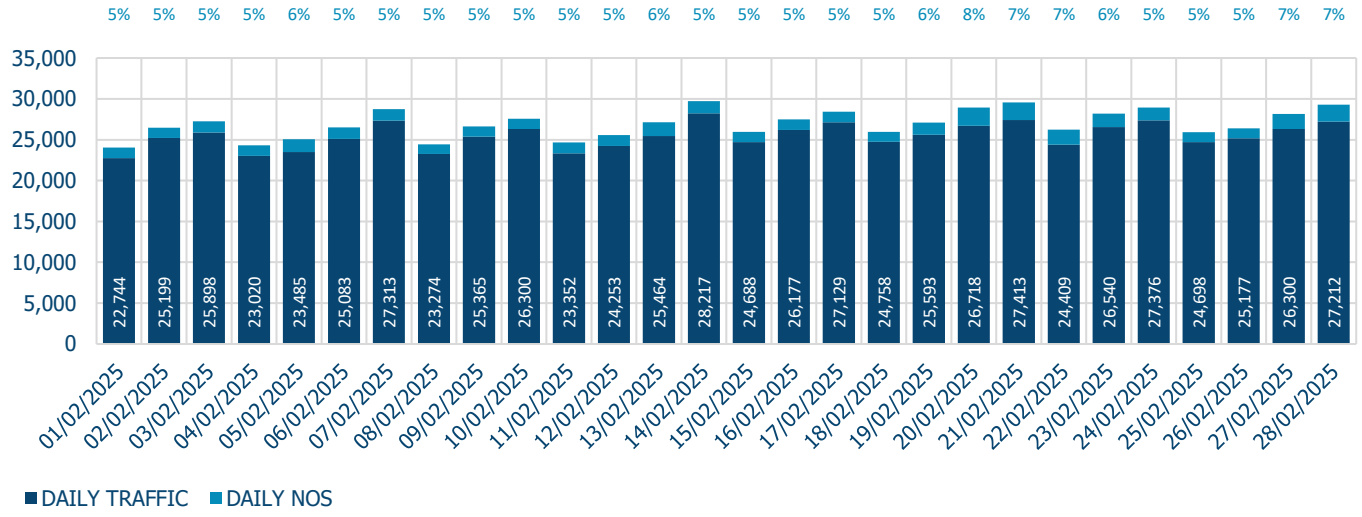


There were 713,155 flights throughout Europe in February 2025, 5.4% up compared to the same period last year.

In February 2025 (vs February 2024), the Low-cost segment saw the largest growth, adding 846 daily flights (+11.5%), twice the increase of the Mainline segment, which added 421 daily flights (+4.7%). The Charter segment grew by 10.1% compared to February 2024, driven by additional daily flights between Türkiye and the Middle East (+14 flights/day), Poland and Egypt (+12) and Germany and Serbia/Montenegro (+8). The All-cargo segment recorded a modest increase of 1.0%. Conversely, the Business aviation (-0.6%) and the Regional (-0.5%) segments declined; the latter saw fewer daily flights in Sweden domestic (-49 flights/day) and Germany domestic (-20). Compared to pre-pandemic levels, three segments exceeded February 2019 flights: Charter (+16.0%), Business aviation (+5.6%) and Low-cost (+2.6%). Overall, total flights in February 2025 reached 96.4% of the levels seen in February 2019.

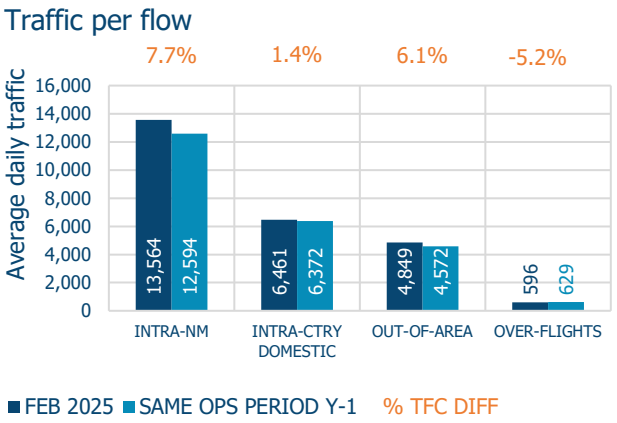
The busiest day was Friday 14 February (28,217 flights), which exceeded the busiest day of February 2024 (27,013 flights).

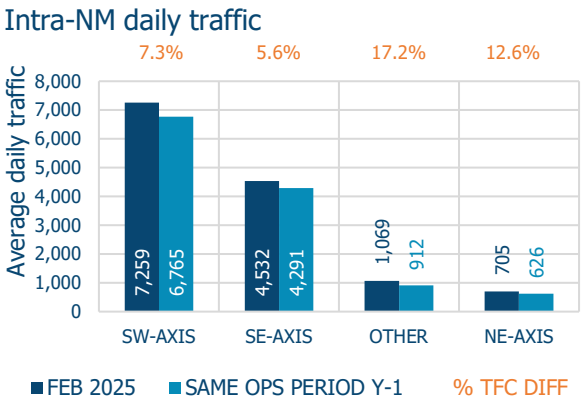
Daily network traffic evolution



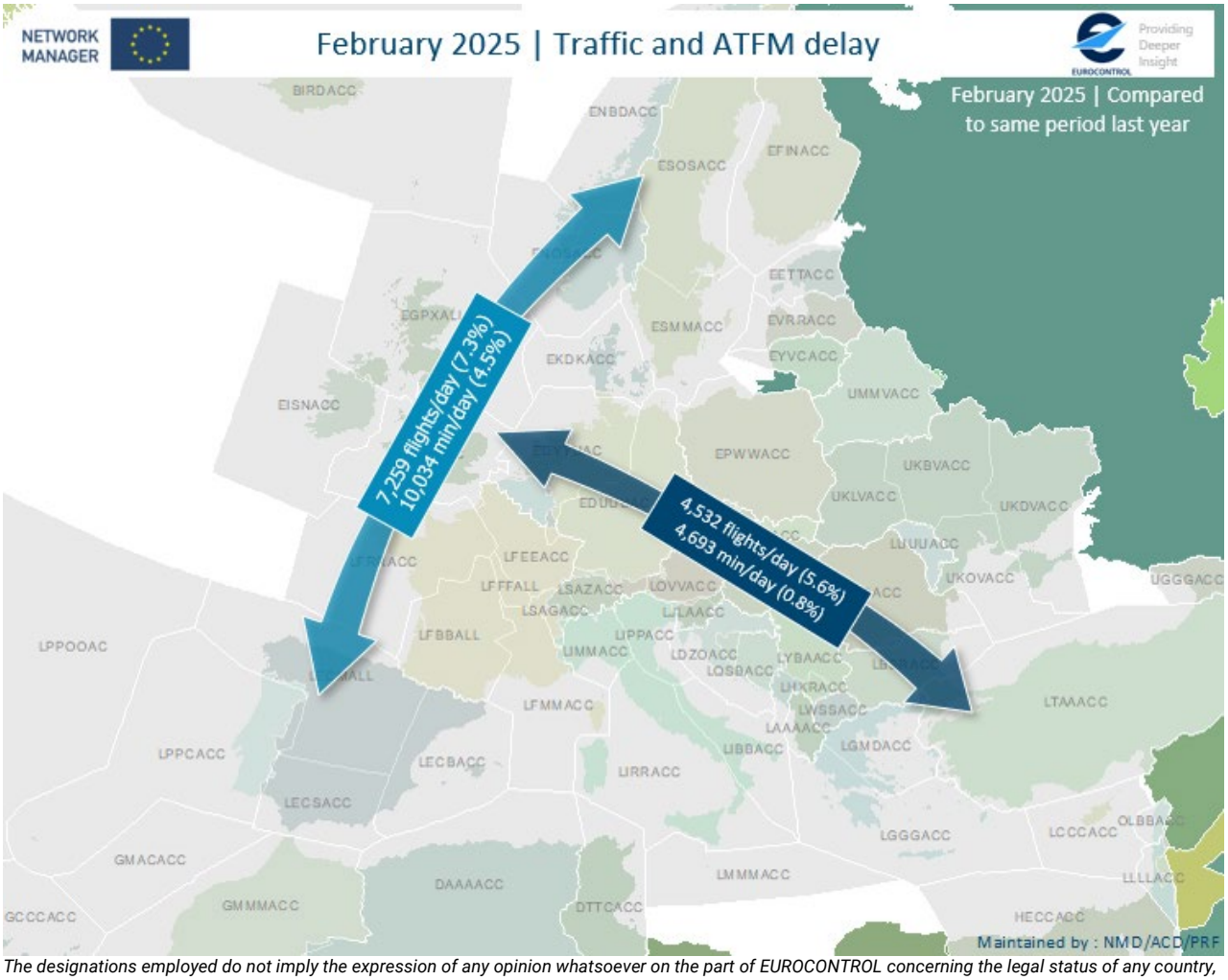
On average, 5.6% of scheduled traffic did not operate in February (see Non-Operated Schedules).

Adverse weather such as snow showers in Turkey between 20 and 22 February impacted operations strongly at major airports with some flight cancellations.





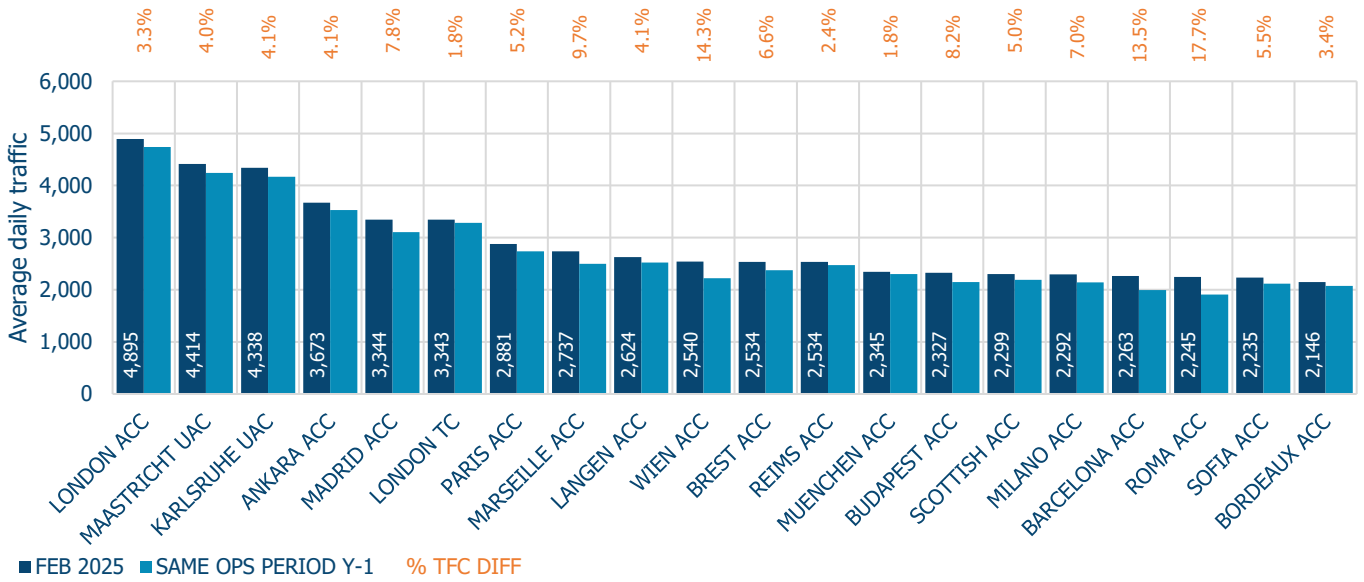
The intra-NM southwest axis saw 7.3% growth compared to 2024 while the southeast axis saw a 5.6% increase, contributing to the overall network growth of 5.4%. Overflight traffic decreased by 5.2% partially due to Iceland joining the NM Area on 01 January.



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. [ii]

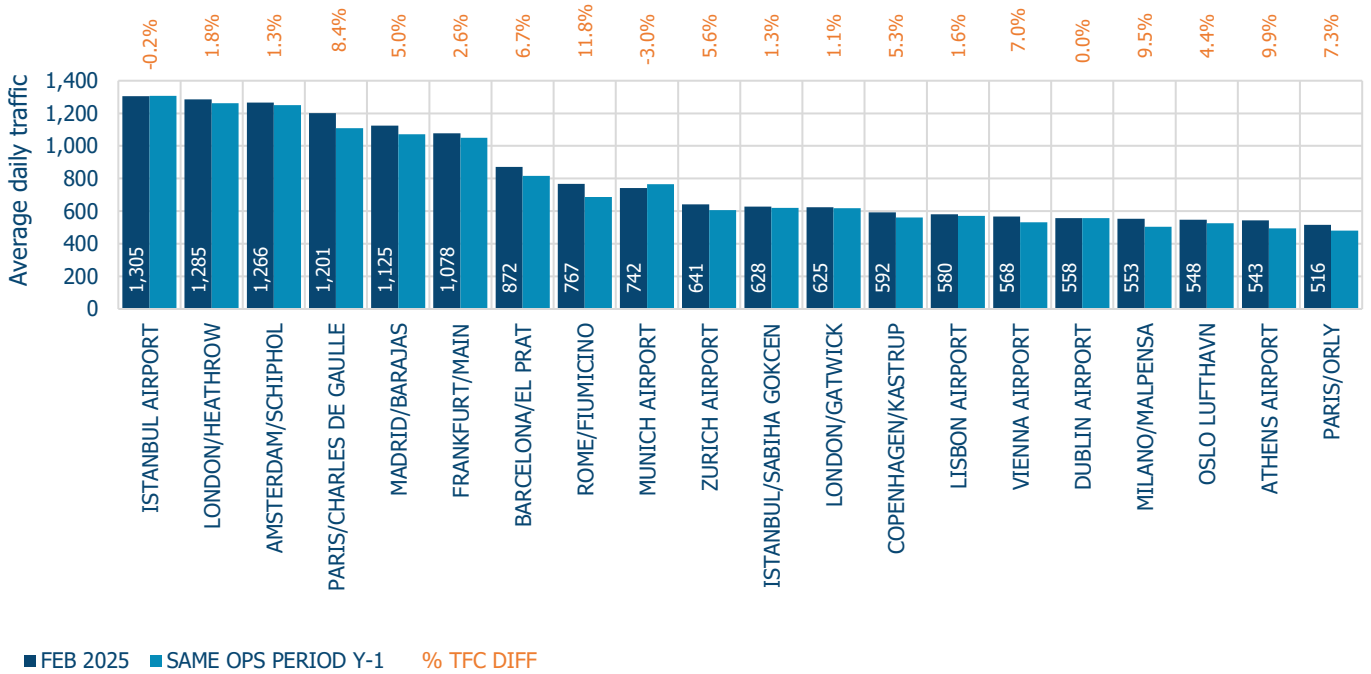
Percentages represent-the difference in daily traffic and en-route ATFM delay compared to the same period last year. [iii]

February 2025 | Top 20 ACC daily traffic



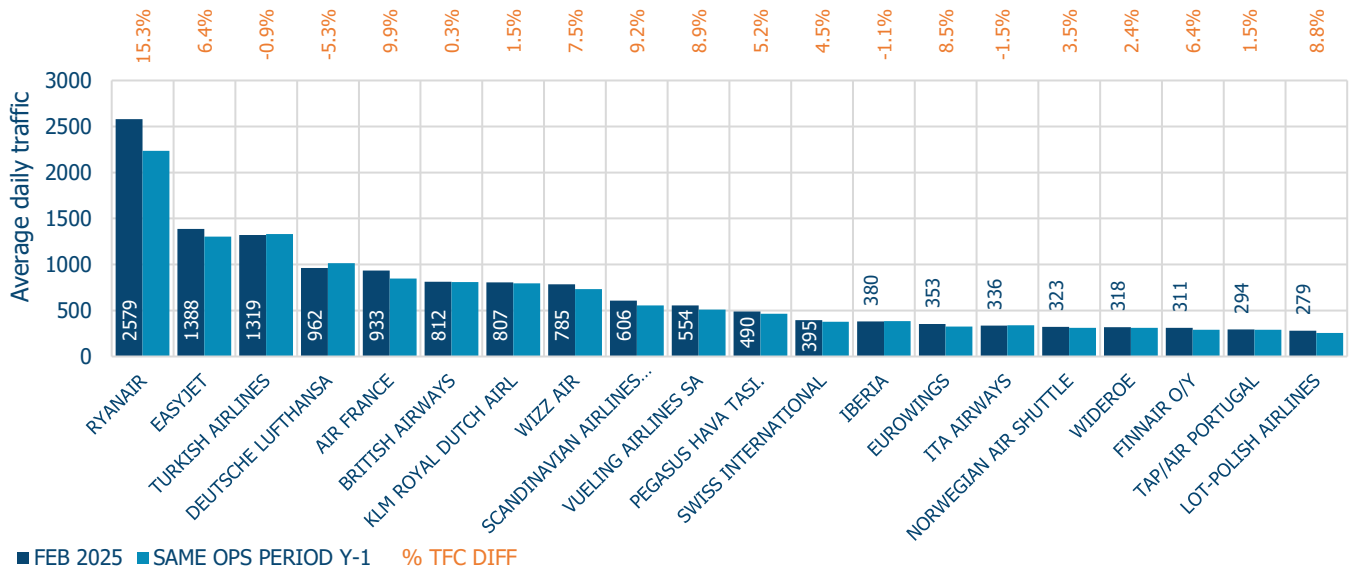
London ACC was the busiest ACC followed by Maastricht UAC, Karlsruhe UAC, Ankara and Madrid ACCs. All Top 20 ACCs saw more traffic compared to February 2024. Vienna, Barcelona and Roma ACCs had double digit traffic growth. The 14.3% traffic growth in Vienna ACC was partly accounted for by the relaxation of route restrictions which had previously been protecting Karlsruhe UAC Sector Group South. Roma's increase resulted from integrating Brindisi's northern sectors since June 2024. High demand explained Barcelona's traffic growth.

February 2025 | Top 20 Airports daily traffic



Istanbul Airport was the busiest airport with an average of 1,305 flights per day, followed by London Heathrow (1,285 flights/day), Amsterdam Schiphol (1,266 flights/day), Paris Charles de Gaulle (1,201 flights/day) and Madrid (1,125 flights/day). Istanbul and Munich had less traffic compared to the same period last year. The traffic decrease at Munich airport was partially due to ground handling industrial action on 27-28 February resulting in approximately 1,430 fewer flights compared to the week before.

February 2025 | Top 20 Air Operator groups daily traffic



Ryanair was the busiest operator with, on average, 2,579 movements per day, followed by easyJet (1,388), Turkish Airlines (1,319), Lufthansa (962) and Air France (933).

Ryanair was the only operator with a double-digit traffic growth in February 2025.

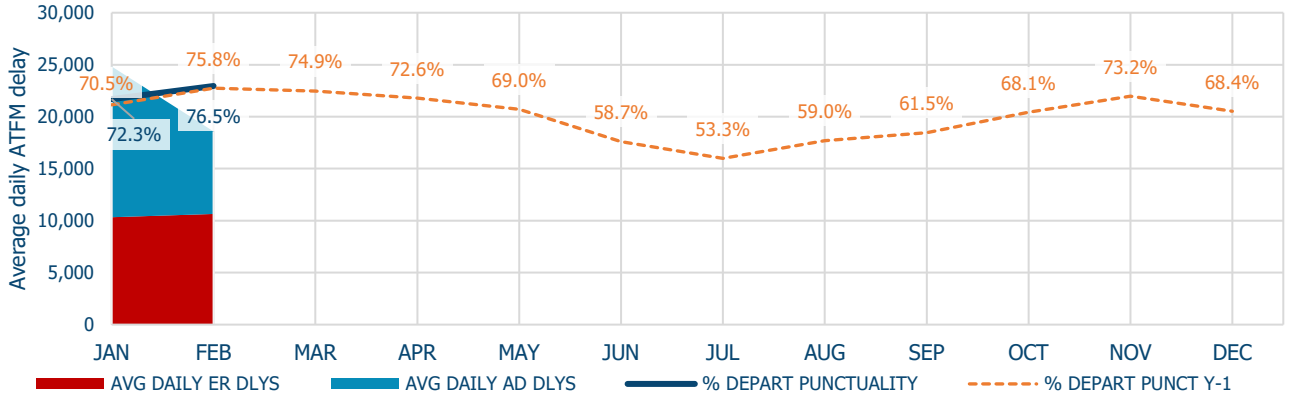
Turkish Airlines, Lufthansa, Iberia and ITA Airways operated fewer flights. Adverse weather such as snow showers in Turkey on 20 February impacted operations strongly at major airports with some flight cancellations for Turkish Airlines.

Lufthansa's traffic decrease can be explained by ground handling industrial action on 27 and 28 February at Hamburg and Munich airport. Aircraft operators were strongly advised to cancel flights on these dates.

3. Punctuality

3.1 Departure Punctuality

Network departure punctuality and ATFM delay



Network departure punctuality (76.5%) was above the level of February 2024 (+1.3 p.p.).

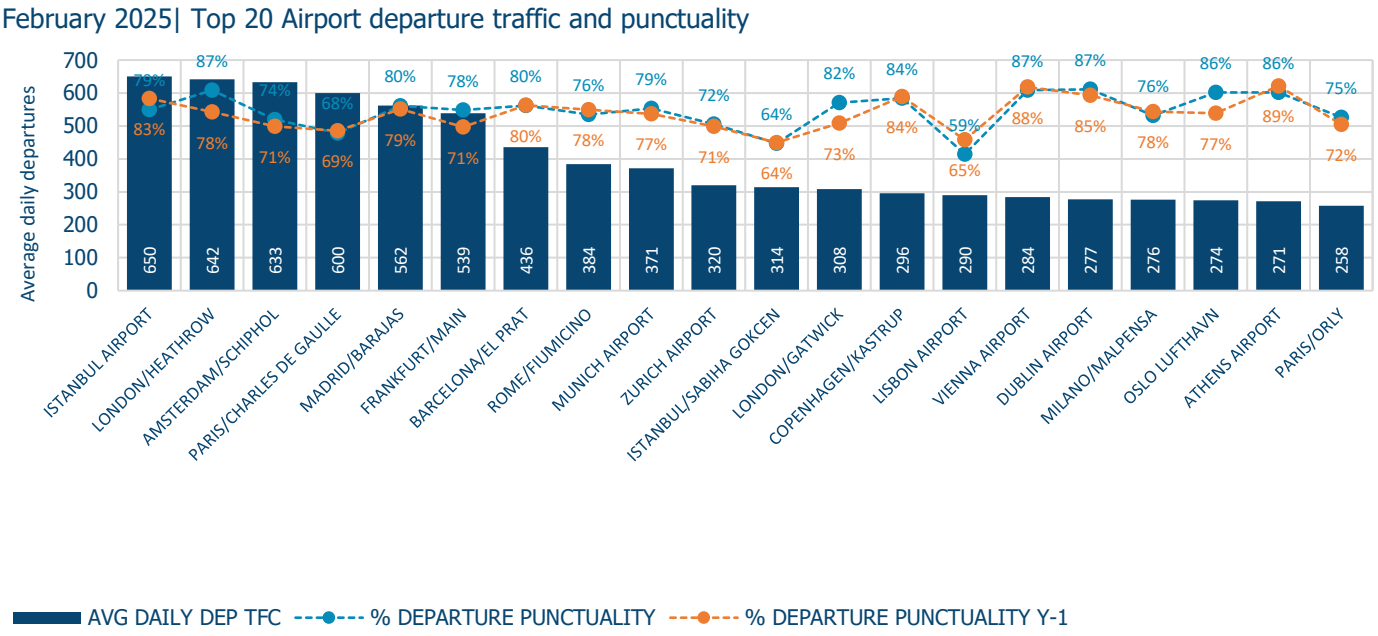
Punctuality on the domestic routes was higher (83.6%) than punctuality at network level. Punctuality on the south-east axis was 78.4% which is a decrease of 0.5 p.p. compared to February 2024 while south-west axis punctuality (77.4%) increased by 0.8 p.p.

Network first rotation departure punctuality was 82.8% and was lower (0.6 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*

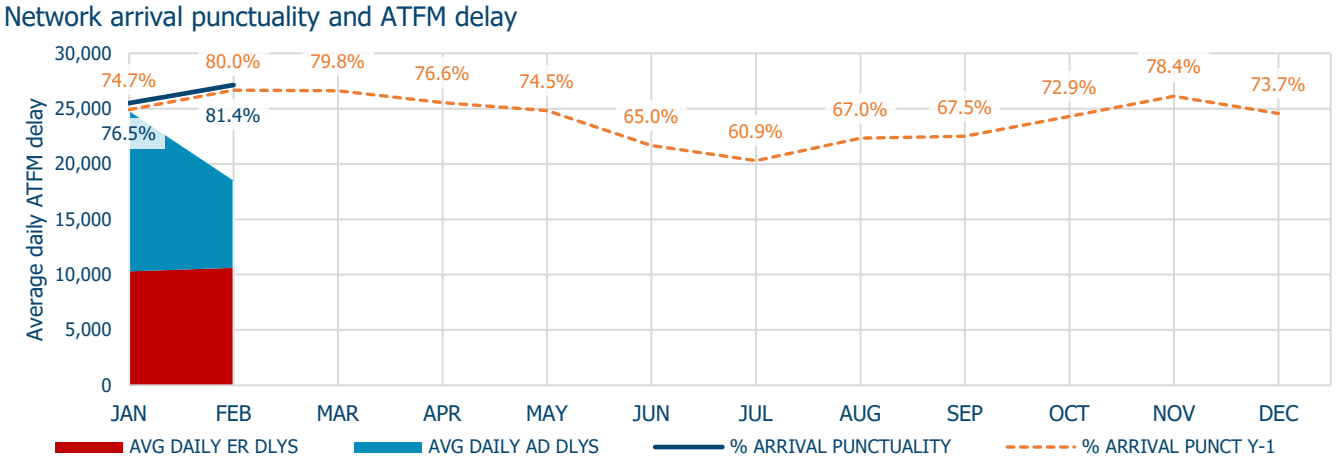
NORTI Dashboard and in MIRROR. Archived data can be found in the FATHOM interactive dashboard.

The Central Office for Delay Analysis CODA reports provide further detailed analysis of airline reported delay reasons.



Many of the Top 20 airports (by traffic) saw similar or better punctuality than February 2024 however seasonal (winter) weather remained a factor for airports. Amsterdam Schiphol did suffer from low visibility seeing very high delays, the airport also continues to suffer from daily aerodrome capacity regulations. London Gatwick also benefitted from fewer days with winds and low visibility compared to last year.

3.2 Arrival Punctuality

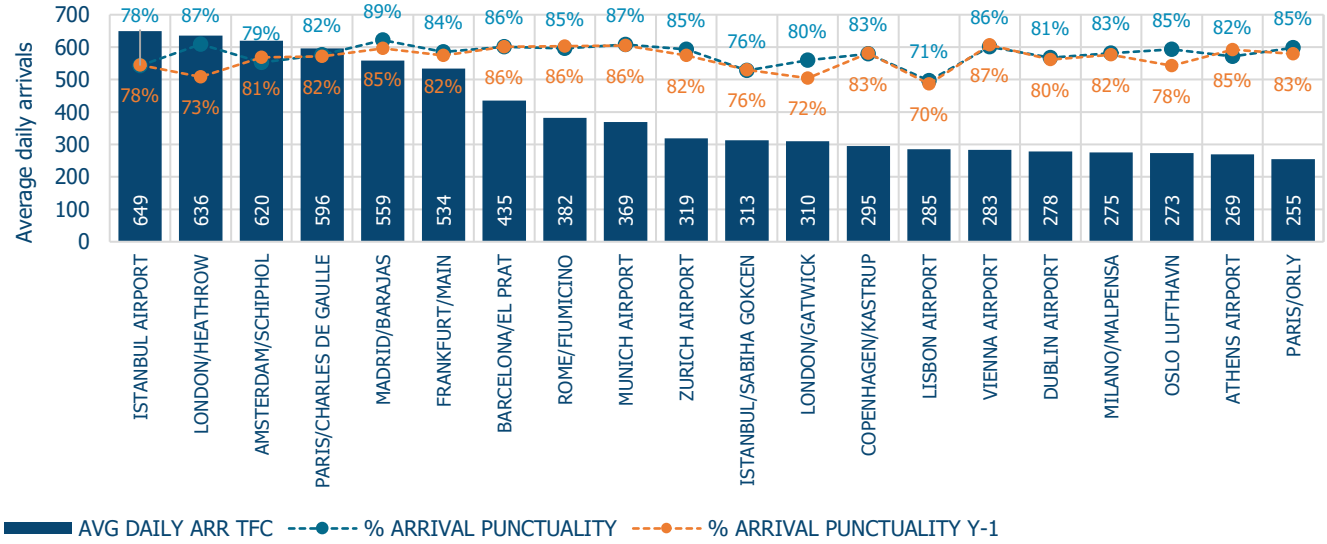


Network arrival punctuality (81.4%) was higher than February 2024 level (+1.4 p.p.).

Domestic routes (83.6%) arrival punctuality was higher than the network level. Punctuality on the south-east axis was 81.6%, lower than February 2024 (-0.3 p.p.), while south-west axis punctuality (81.9%) was 1.2 p.p. higher.

First rotation arrival punctuality (87.2%) decreased by 0.2 p.p. compared February 2024.

February 2025 | Top 20 Airport arrival traffic and punctuality



As per the departure section 3.1 above, seasonal weather (mainly low visibility and winds) also influenced airport arrival punctuality during February, but many airports saw small improvements in punctuality. London Heathrow saw improved punctuality as less weather influenced punctuality. Oslo also saw lower weather delay compared to last year where fog and snow caused delays. Lisbon suffered lower punctuality amongst the Top 20 by traffic, with this year seeing slightly more weather delay (low visibility and CBs), however on trend with the other airports it remained stable.

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 remains unchanged and will currently expire on 31 March 2025, and for Syrian airspace remains unchanged and valid until 30 April 2025 unless reviewed earlier.

A Meeting to present and agree on the Summer 2025 Network measures, including weather scenarios took place on 20 February 2025 in EUROCONTROL HQ.

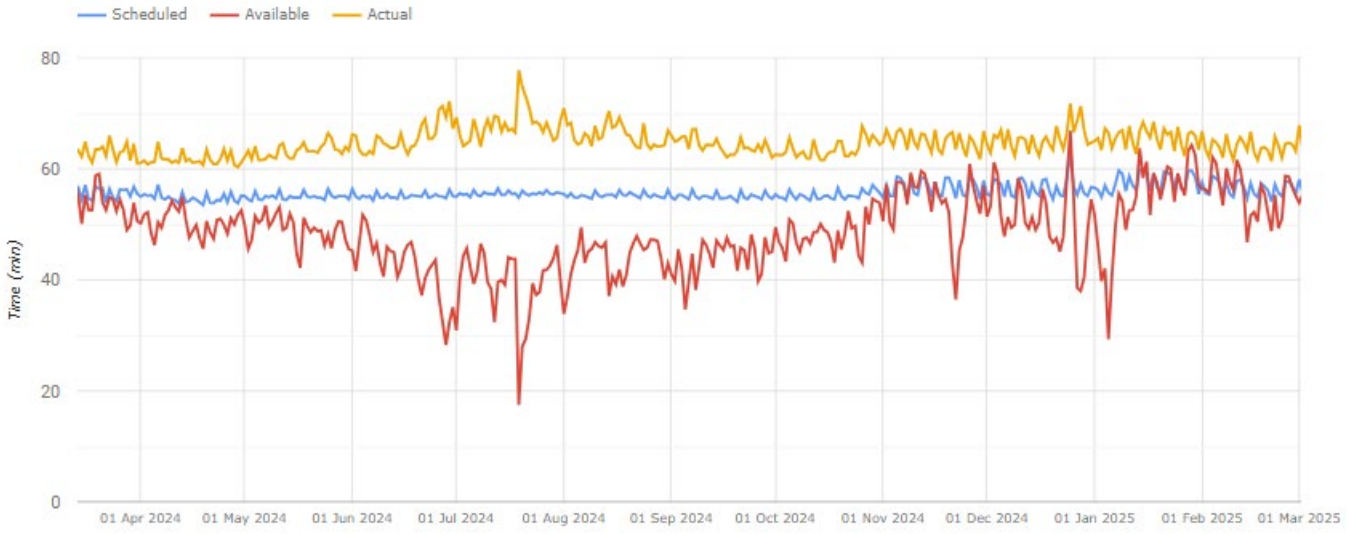
An online webinar forum was hosted by the NM Airport Unit on 20 February addressing topics around unlocking runway capacity, with contributions from the LVNL, NATS and Leidos.

NMOC's E-Helpdesk received 185,000 requests in February: 130,000 from AOs, 3 ,000 from FMPs and 2,000 from Towers. 1,100 of these requests were about flights that the AO considered "critical". The average delay saved per processed request was 23 minutes.

NMOC reduced en-route ATFM delays by 15.6% and airport ATFM delays by 8.9% through direct actions.

4.2 Ground

MIRROR's[i] indicator shows that in February the network (average) available turnaround time remained stable compared to February 2024 as punctuality improved. Early in the month available turnaround time exceeded scheduled as delay fell. Later in the month some weather days saw available fall (such as 21 February where London Heathrow and Lisbon suffered from high winds.



NM is monitoring TTOT[iv] calculation quality for the 33 A-CDM airports. The average error at a network level was 10.2 minutes and is a decrease of 1.3 minutes as compared to January 2025. Palma de Mallorca (LEPA) presented the lowest error value among the airports – 7.8 minutes. Lisbon (LPPT) notices the highest error value at 15.5 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

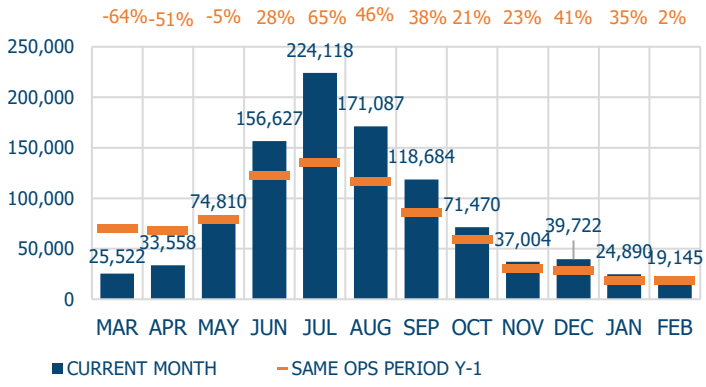
There were 536,049 minutes of ATFM delay in February, 2.4% higher than February 2024.

En-route ATFM delay represented 57.0% of these ATFM delays and airport 43.0%. Most of ATFM delays were due to en-route ATC capacity and airport weather issues.

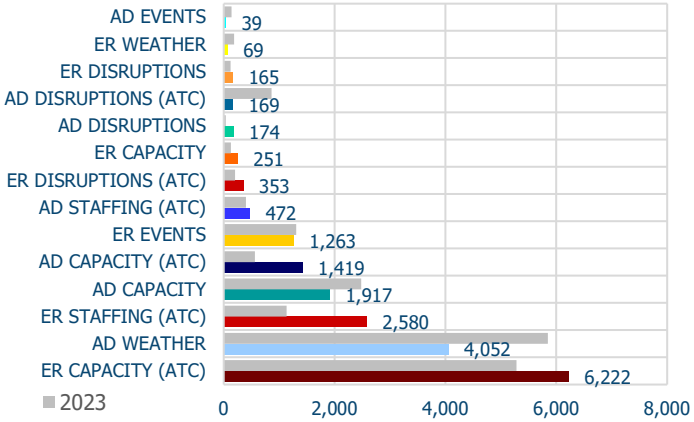
The average en-route ATFM delay per flight for the network was 0.4 minutes in February – a similar level to last year.

Network departure schedule delay was 13.3 minutes/flight in February (the same level as 2024).

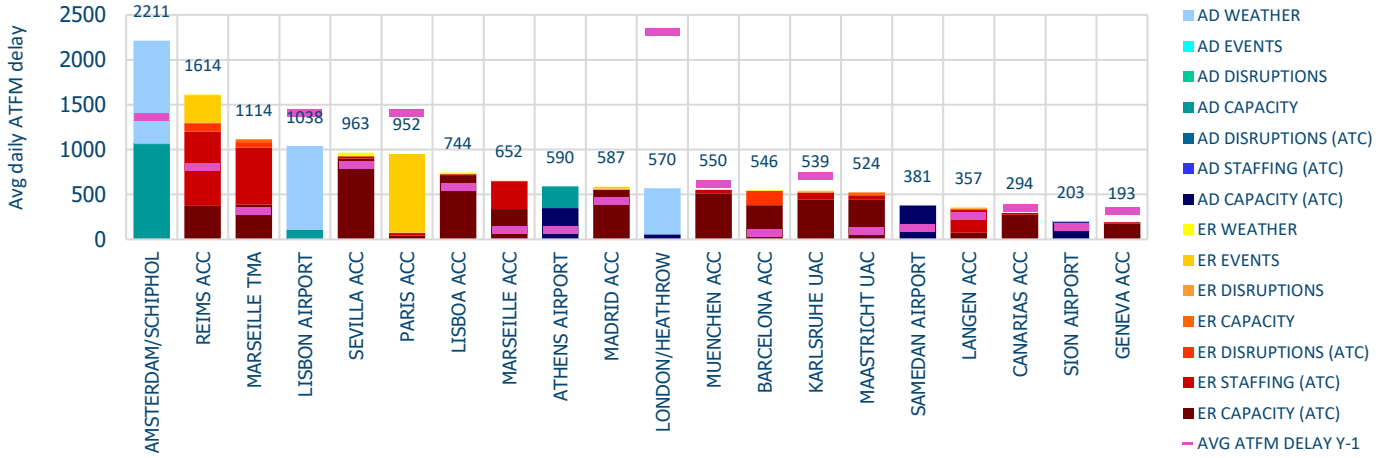
Last 12 months average daily ATFM delays



February 2025 | Reasons for ATFM delays



Top 20 delay reference locations in February 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:

- ATC capacity issues in the south-west Axis – Sevilla, Lisbon, Madrid ACCs - due to demand exceeding capacity to/from the Canarias islands. ATC capacity issues in Munich ACC and Karlsruhe UAC due to demand exceeding available sectors.
- Low visibility operations at Amsterdam/Schiphol and Lisbon airports. Strong winds at London/Heathrow airport.
- Frequent staffing issues in Reims and Marseille ACCs limiting sector availability and generating delays.

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. Capacities were increased to –10% with effect from 12 February and some overflight restrictions were lifted from 17 February. Measures for 4-Flight generated 24,869 minutes of ATFM delay.
- Transfer of airspace below FL195 from Reims ACC to Basel and Strasbourg approach sectors generated 8,653 minutes of ATFM delay.
- Bordeaux and Brest ACCs have started the training and live trial periods in preparation for the implementation of the 4-Flight system.
- Local radar issues in Valencia TMA until 10 February generated 4,525 minutes of ATFM delay in Barcelona ACC.
- Frequency issues in Marseille TMA from 11 to 17 February generated 1,738 minutes of ATFM delay.
- Local radar issues at Paris Beauvais airport throughout the month generated 1,751 minutes of ATFM delay.

Industrial action

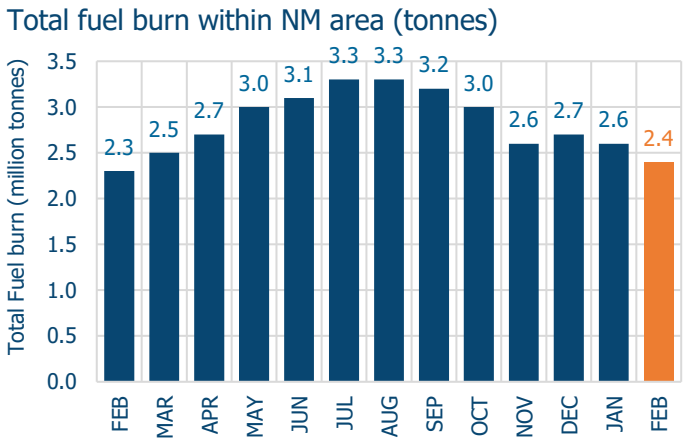
- Baggage handlers strike at Italian airports on 05 February affecting Rome Fiumicino, Rome Ciampino, Milano Linate and Milano Malpensa. ITA Airways announced the cancellation of 26 movements.
- National strike in Belgium on 13 February: Brussels ACC was closed leading to cancellation of all passenger flights at Brussels, Charleroi, Liege and Ostend airports. Locally reported on-load of

traffic in neighboring states generated 1,179 minutes of ATFM delay.

- Ground handling industrial action at Hamburg and Munich airport on 27 and 28 February disrupted operations with approximately 63 fewer flights at Hamburg and 1,372 at Munich airport compared to the week before.
- ATC industrial action in Greece on 28 February as part of one day national strike generated 257 minutes of ATFM delay in Athens ACC. Only traffic to/from Greece was affected, approximately 705 fewer flights were recorded compared to the week before.

5. Flight Efficiency

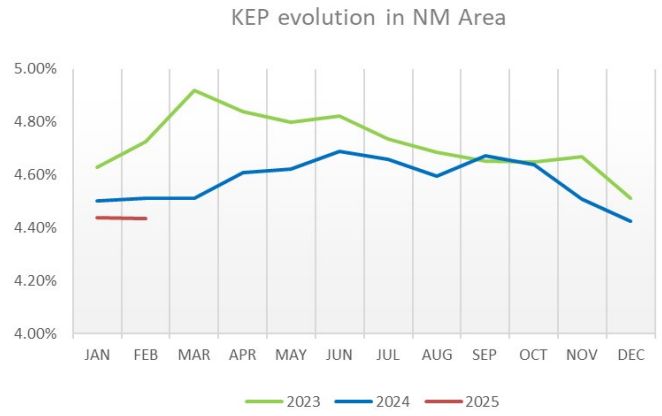
5.1 Fuel Burn



NM estimates that 2.4 million tonnes of fuel was burnt in the en-route flight phase in the NM area in February.
This is 7% more narrow body aircraft than February 2024

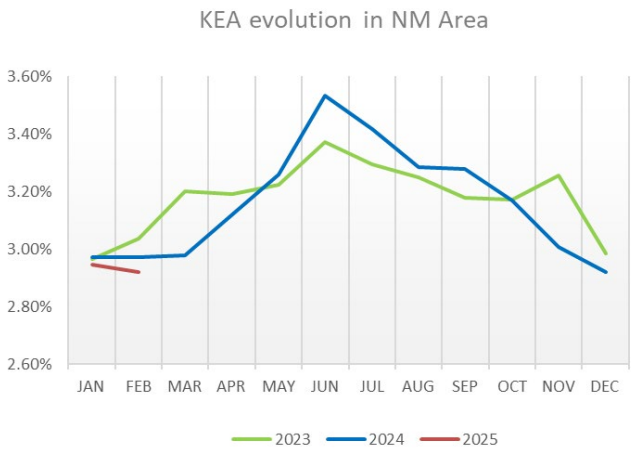
5.2 Horizontal Flight Efficiency

There are two horizontal flight efficiency KPIs[v]. 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 remained below 2024 and 2023 levels.



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

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



KEA indicator (2.92%) 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**

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[i] *Average daily traffic used to avoid leap year effect from 2024.*

[ii] *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.*

[iii] *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.*

[iv] *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.*

[v] *More information on KEP and KEA, see ANS performance page.*

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