AVIATION
INTELLIGENCE+

EUROCONTROL

EUROPEAN AVIATION OVERVIEW

03-09 Feb 2025

Thursday 13 February 2025

Week 6 Headlines

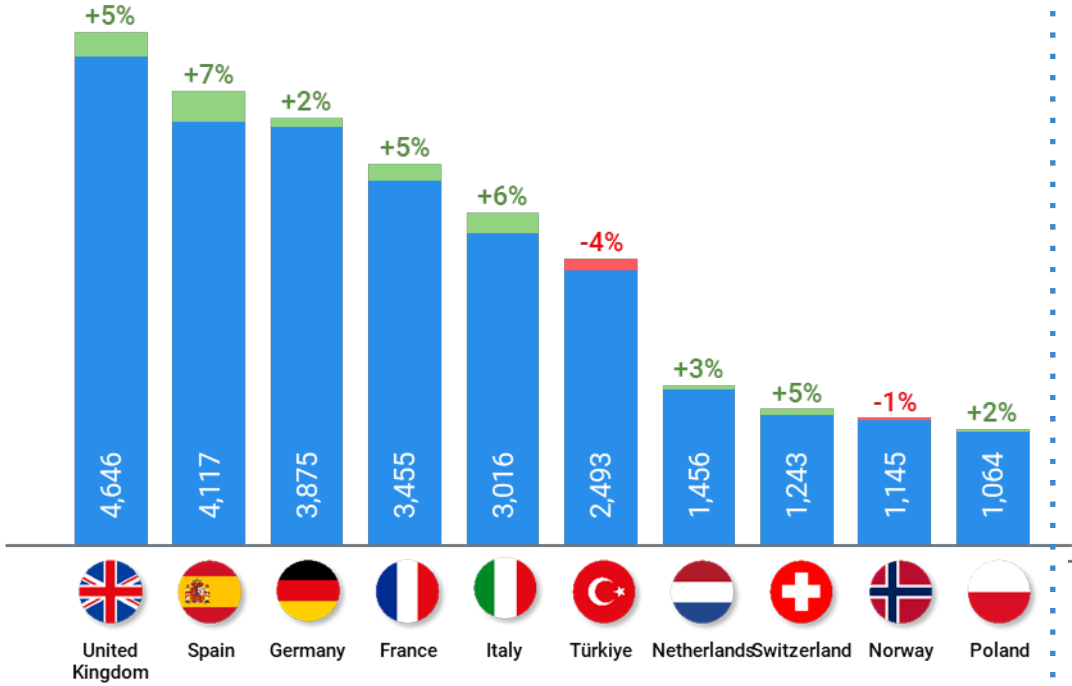
(Week 03-09 Feb 2025)

- The network recorded 24,776 average daily flights (+5% vs 2024).
- Aggregate traffic was 3.6% higher week-on-week across the top 10 States, with 8/10 of those States recording higher flight levels.
- Network traffic (flights) for February so far is at 96% of 2019 levels. Locally, the situation is more diverse.
- Year-to-date traffic is 95% of 2019, 5% more than 2024.
- Arrival and departure punctuality were 84.8% and 79.8% respectively, posting improvements on punctuality recorded in the same week in both 2024 and 2019.
- En-route ATFM delays were slightly higher than in the previous week (+12%), with an average of approximately 7,000 daily minutes. This is however 18% lower than in 2024 and represents, on average, 0.28 min/flight.
- ATC capacity/staffing was the top delay cause last week (67% of all en-route ATFM delays), followed by Other causes (20%, including the system transition at Paris ACC).
- The average jet fuel price stood at 2.26 USD/gallon on 07 February, a 9% increase on early December 2024.

Top 10 busiest States

In week 03-09 Feb 2025

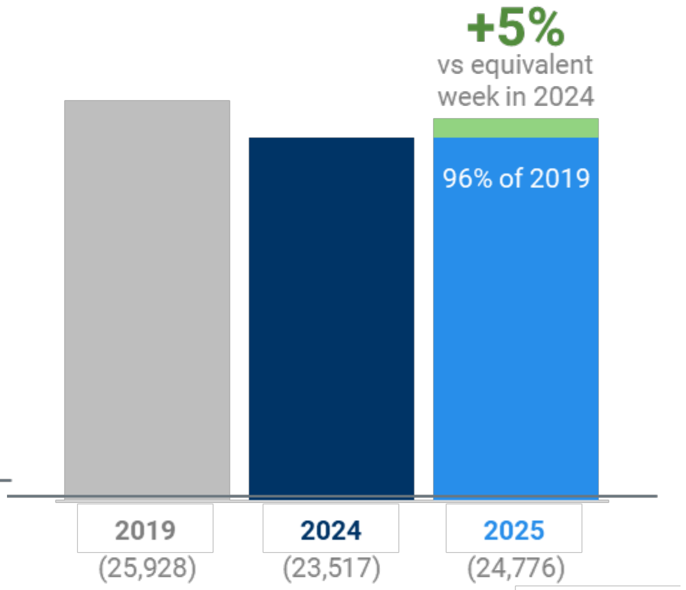
(all flights excl. overflights compared with the previous week)



Traffic situation

Average daily flights (including overflights)

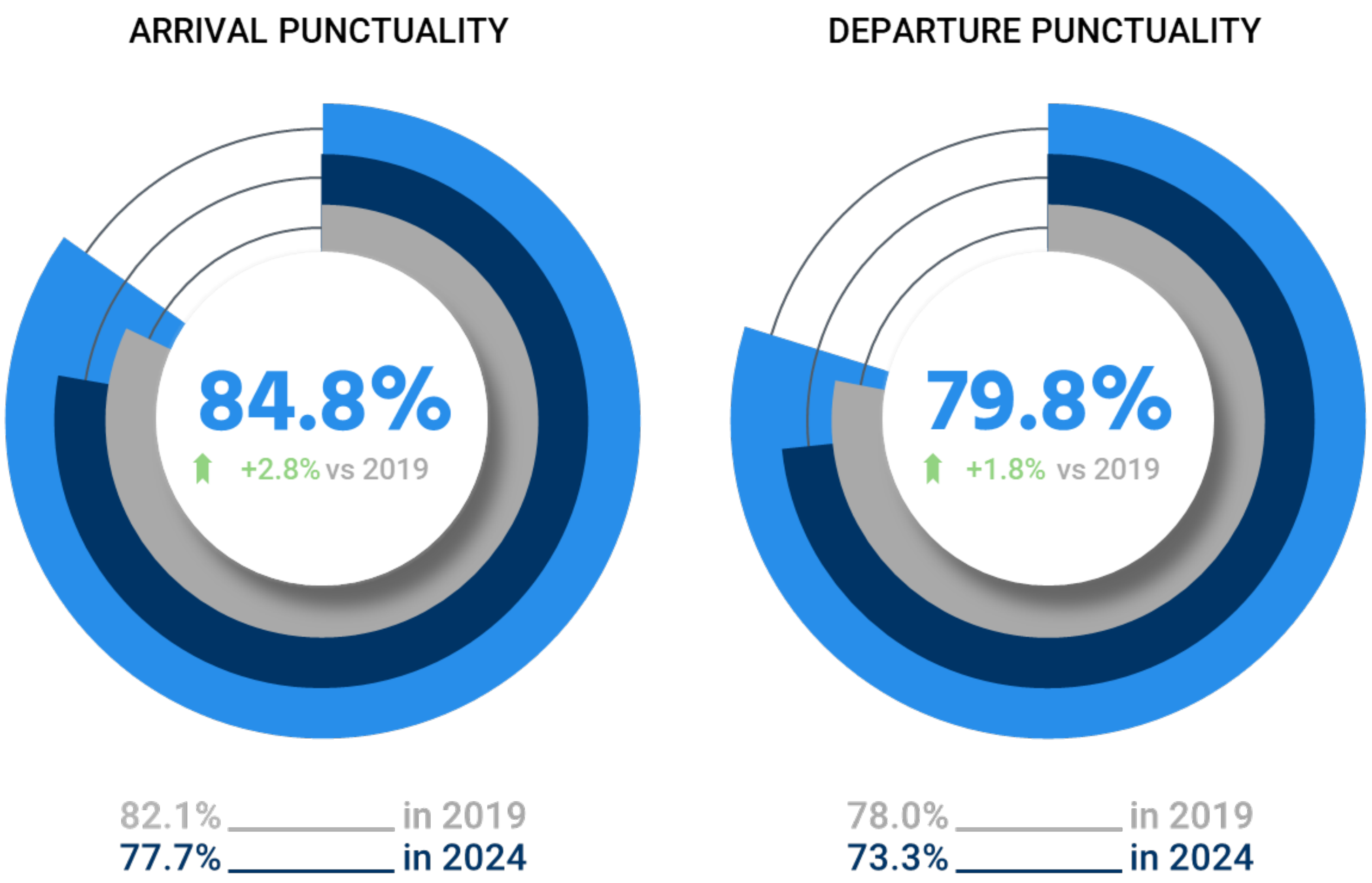
Week 03-09 Feb 2025



Arrival & departure punctuality

(all network scheduled flights)

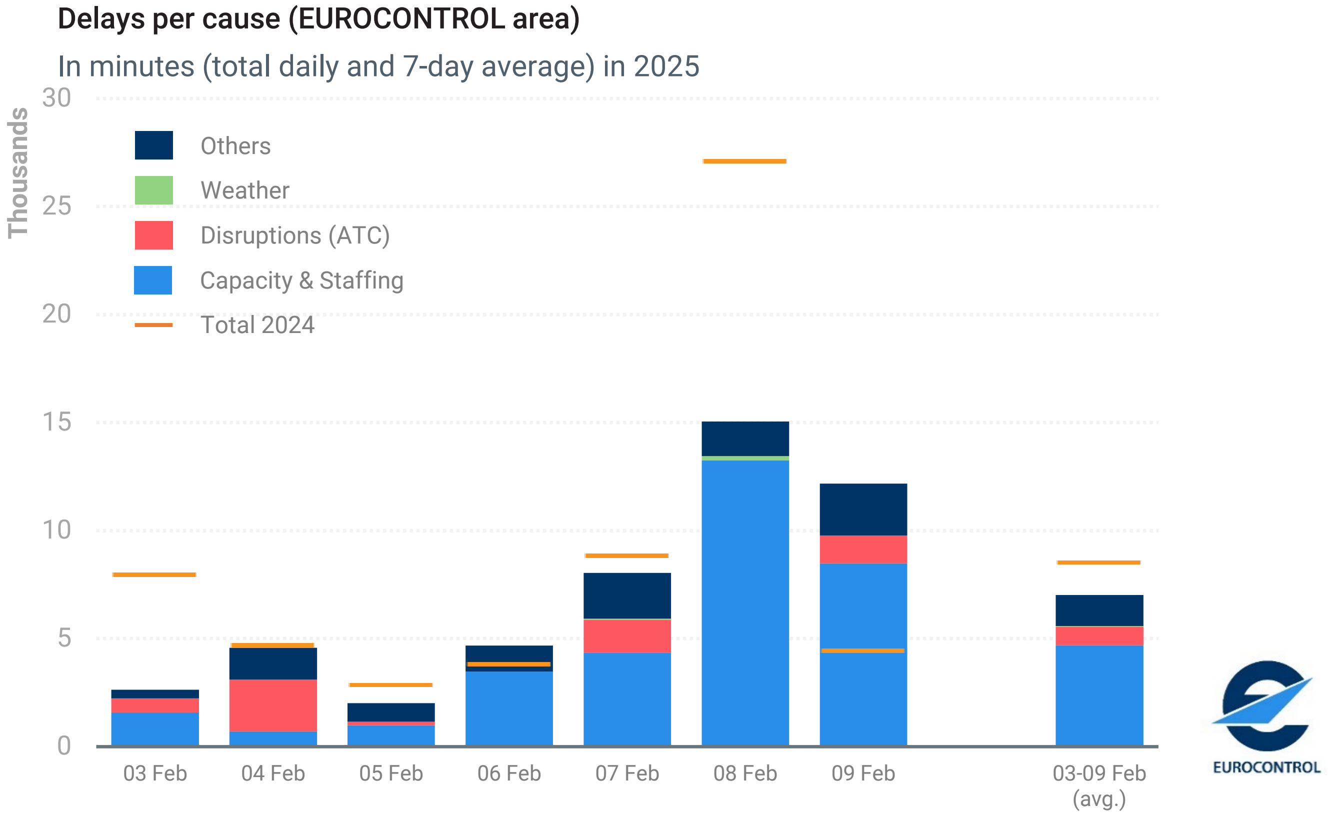
Week 03-09 Feb 2025



- Compared with the equivalent week in 2024, arrival punctuality improved by 7.1 percentage points to 84.8%, while departure punctuality also improved by 6.5 percentage points to 79.8%. Compared with the same week in 2019, both indicators recorded a (more moderate) improvement too.
- Amsterdam Schiphol was mostly impacted by weather (fog and low visibility) during Week 6.
- Athens saw regulations due to single runway operations as runway 03L/21R was closed for maintenance.
- Nice made the top 3, but this was mainly driven by an ATC capacity regulation on 09 Feb.
- Punctuality at both Lisbon and London Gatwick has improved compared with last year, when strong winds caused high delays at both airports.

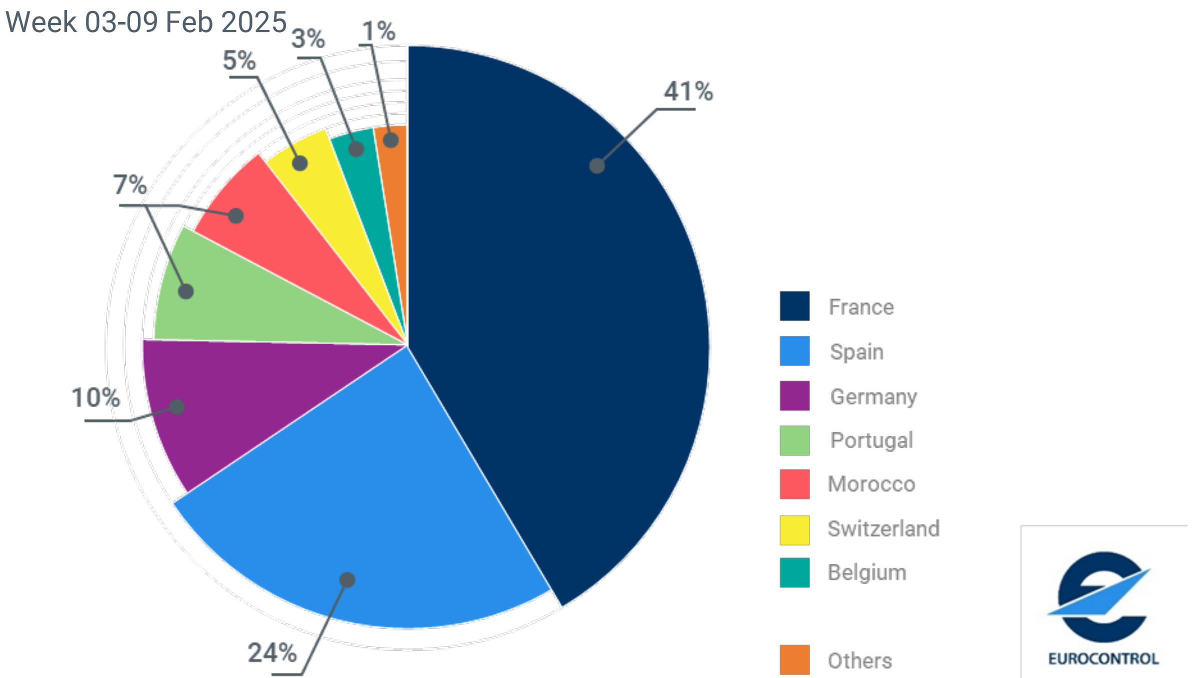
The graphics show the share of flights arriving/departing no later than 15 minutes after/before their scheduled time (OTP15).

En-route ATFM delays



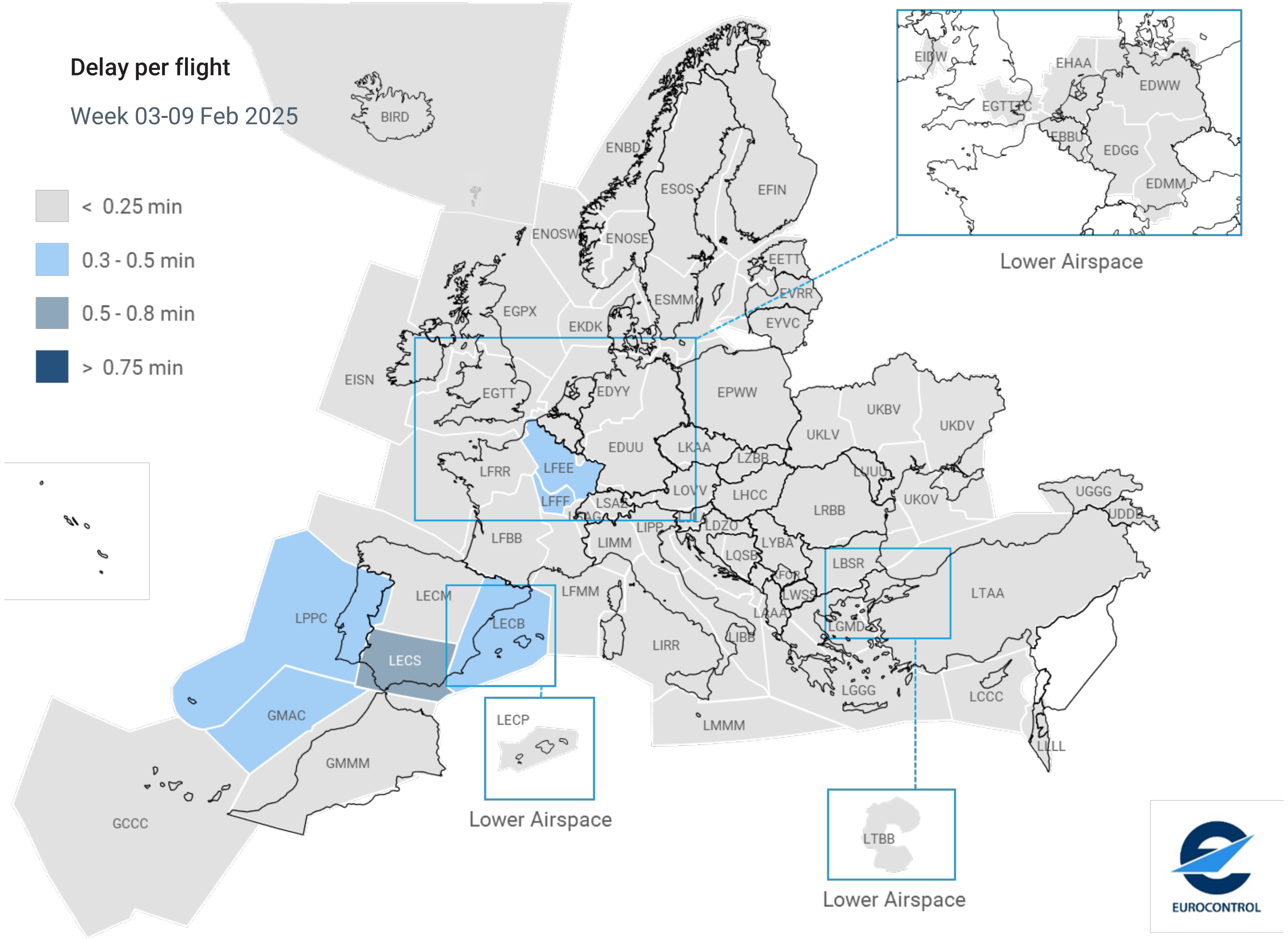
- Week 6 (03 - 09 Feb) registered higher delays than Week 5, with an average of 7,024 daily minutes. However, these en-route ATFM delays were 18% lower than for the same operational week of 2024.
- ATC capacity/staffing were responsible for 67% of all en-route ATFM delay, especially in the South-West (Sevilla ACC, Lisboa ACC, Agadir ACC) but also in Munich ACC and Reims ACC, followed by “Others”, which accounted for 20% of all en-route ATFM delays.
- ATFM delay was just above 0.5 min/flight on Week 6 (with 0.28 min/flight en-route and 0.26 min/flight airport), 6% higher than in Week 5.

Share of en-route ATFM delays



- France accounted for 41% of all en-route ATFM delays, primarily due to some staffing issues limiting sector availability on Saturday in Reims ACC. Paris ACC continues to be affected by the 2nd phase of the transition to the “4-Flight ATM system” implementation.
- Spain accounted for 24% of all en-route ATFM delays, mostly driven by staffing & capacity issues in Sevilla ACC, as well as an ongoing military training exercise affecting airspace availability in Madrid and Barcelona FIR/UIRs.
- Germany accounted for 10% of all en-route ATFM delays, largely due to capacity and staffing issues in Munich ACC.

En-route ATFM delayed flights per Area Control Centre



- In Week 6 (03 - 09 February), no ACCs recorded en-route ATFM delays higher than 1.0 min/flight.
- Sevilla ACC recorded 0.5 min/flight. Traffic was 34% above 2019 levels. The centre was impacted by high demand exceeding available sector capacities during the weekend.
- Agadir ACC recorded 0.5 min/flight. The centre has seen growing overflight demand to/from the Canary Islands, exceeding sector capacities over the weekend due to the mid-February Carnival and late April Easter vacation periods.
- Reims ACC recorded 0.4 min/flight. The centre recorded sector capacity issues and weather disruptions, as well as staffing issues limiting sector availability, mainly during the weekend.
- Paris ACC recorded 0.3 min/flight. The main ATFM delay cause was the implementation of the 2nd phase of the 4-Flight ATM system project (07 Jan to 16 Mar).

Top 10 States

Departures and arrivals

See more

Week 03-09 Feb 2025

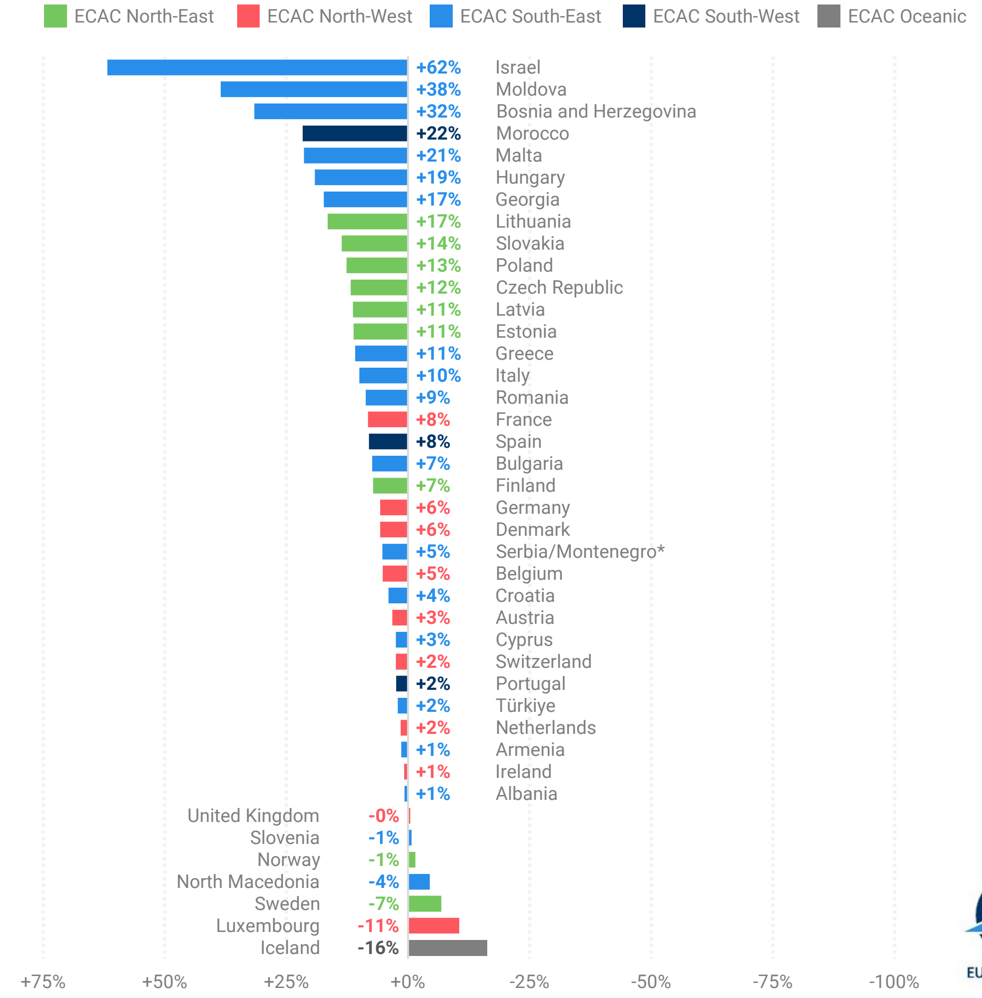
No.	Country	Average daily flights	% prev week	% prev year	% 2019
1.	United Kingdom	4,646	+5%	-0%	-8%
2.	Spain	4,117	+7%	+8%	+15%
3.	Germany	3,875	+2%	+6%	-23%
4.	France	3,455	+5%	+8%	-5%
5.	Italy	3,016	+6%	+10%	+5%
6.	Türkiye	2,493	-4%	+2%	+13%
7.	Netherlands	1,456	+3%	+2%	-1%
8.	Switzerland	1,243	+5%	+2%	-3%
9.	Norway	1,145	-1%	-1%	-14%
10.	Poland	1,064	+2%	+13%	+11%

- The top 10 States, in aggregate, recorded 3.6% more flights than in the previous week.
- Spain recorded the greatest increase (+7%, mainly due to more flights by Ryanair, Vueling and easyJet) on domestic flows and on two international flows, Spain ↔ UK and Spain ↔ Germany.
- Four States in the top 10 are recording traffic above 2019 levels (Spain, Türkiye, Poland and Italy), with the remainder between 1% and 23% below pre-COVID levels.
- Traffic to/from Israel is up +62% vs the same week in February 2024, reflecting the impact then of the conflict with Hamas starting end-October 2023. Iceland recorded a 16% decrease on the same week in February 2024 owing to severe storms on 5 & 6 February 2025.

States in the EUROCONTROL Network

Compared with the equivalent week in 2024

Dep/arr flights for week 03-09 Feb 2025



*Based on integrated ANSP

Top 10 aircraft operators

Week 03-09 Feb 2025 (average daily flights)

See more

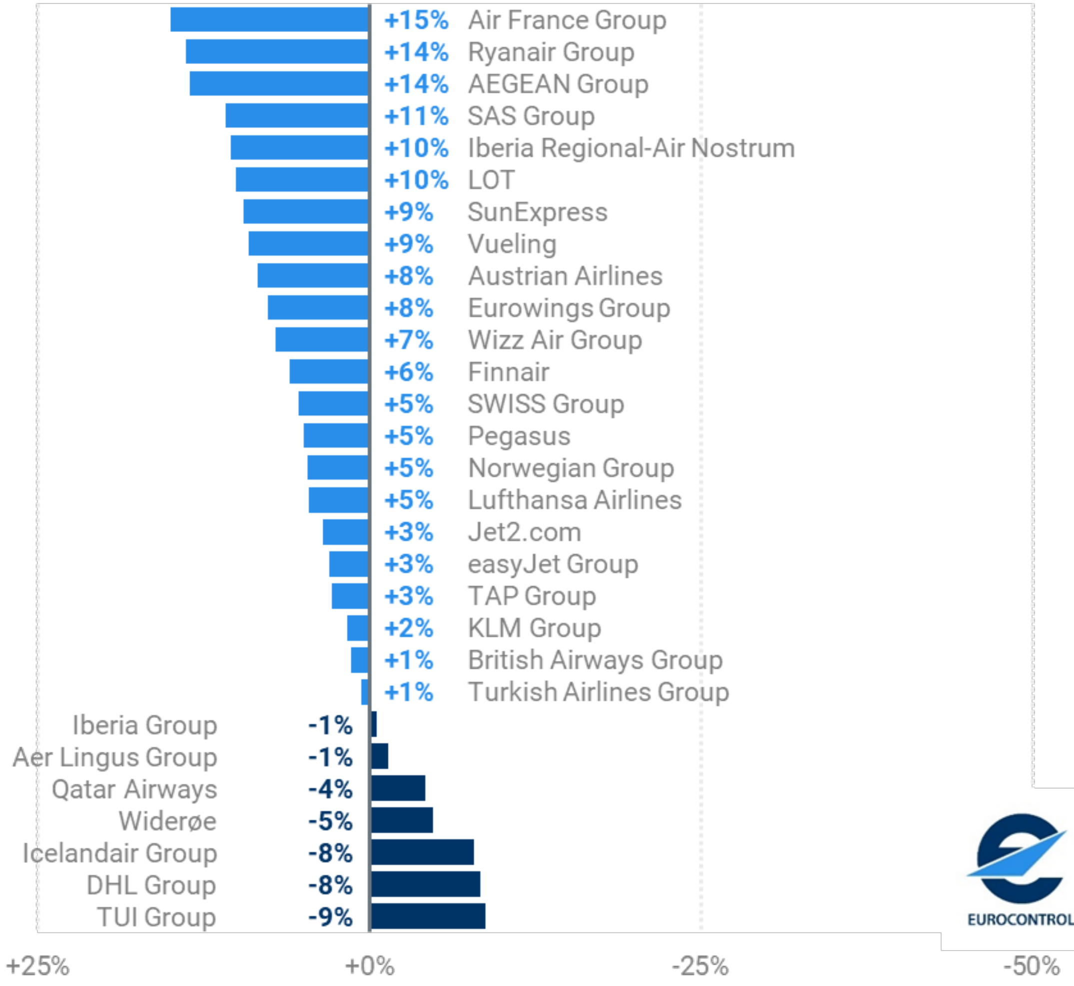
No.	Aircraft operator	Average daily flights	% prev week	% prev year	% 2019
1.	Ryanair Group	2,527	+11%	+14%	+31%
2.	Turkish Airlines Group	1,351	-5%	+1%	+7%
3.	easyJet Group	1,227	+29%	+3%	-12%
4.	Lufthansa Airlines	952	+3%	+5%	-31%
5.	Air France Group	888	+1%	+15%	-20%
6.	British Airways Group	806	+2%	+1%	-7%
7.	Wizz Air Group	790	-1%	+7%	+72%
8.	KLM Group	780	+1%	+2%	+9%
9.	SAS Group	605	+7%	+11%	-22%
10.	Vueling	529	+6%	+9%	+16%

- The top 10 aircraft operators, in aggregate, recorded 5.9% more flights than in the previous week.
- All but two of the top 10 aircraft operators recorded more flights than during the previous week.
- easyJet increased by far the most (+29%), mainly on the flows France ↔ Italy, Spain ↔ UK and domestic UK, followed by Ryanair (+11%), with growth on domestic Italy, Spain ↔ UK and Italy ↔ Spain.
- Turkish Airlines decreased by 5% with lower domestic Türkiye flows as well as on flows Saudi Arabia ↔ Türkiye as well as US ↔ Türkiye.
- Compared with 2024, all the main airlines/airline groups recorded more flights – with half of the top 10 carriers/groups (Wizz Air, Ryanair, Vueling, KLM and Turkish Airlines) flying more than in 2019.
- The highest traffic increase vs 2024 is for Air France (+15%), while the largest decrease is for TUI (-9%).

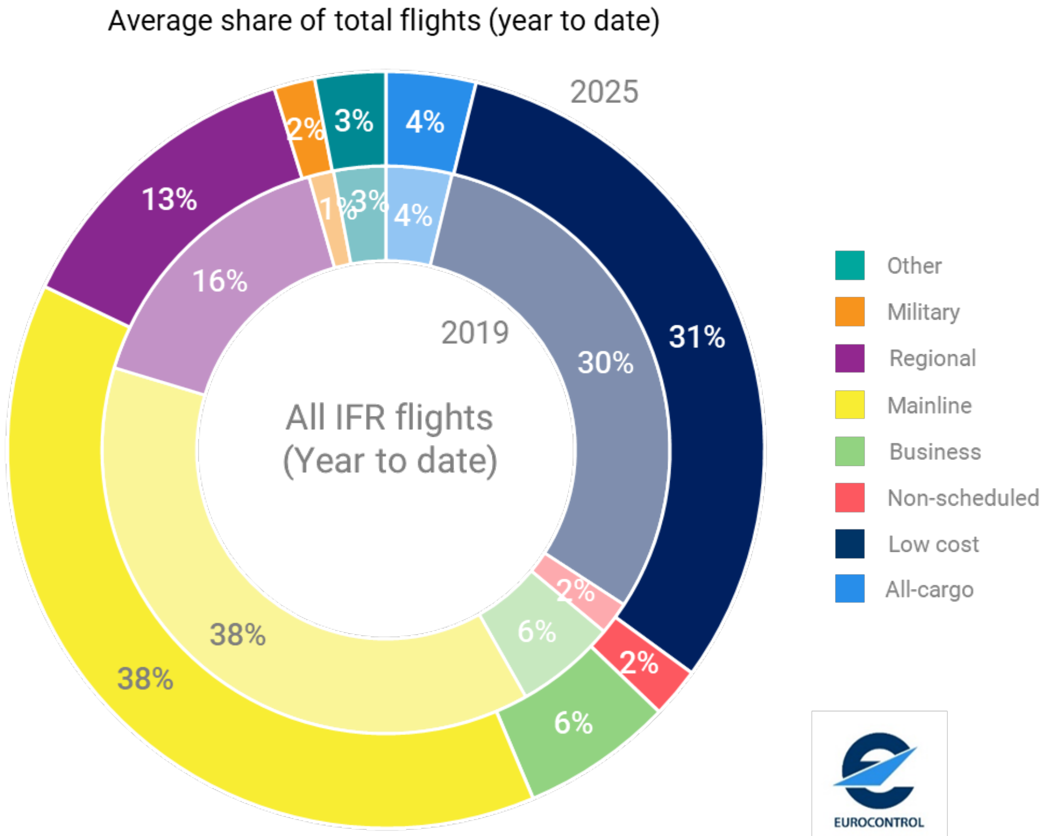
Aircraft operators in the EUROCONTROL network

Compared to the equivalent week in 2024

Dep/arr flights for week 03-09 Feb 2025



Market segments in the EUROCONTROL network

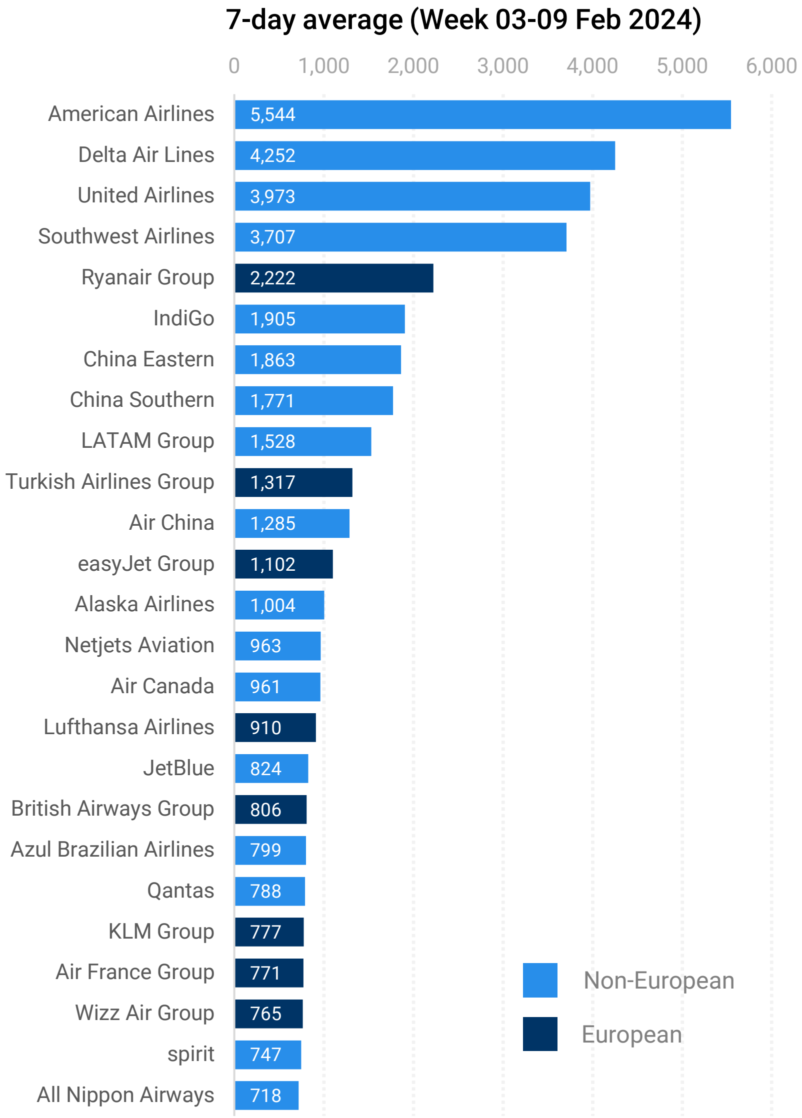


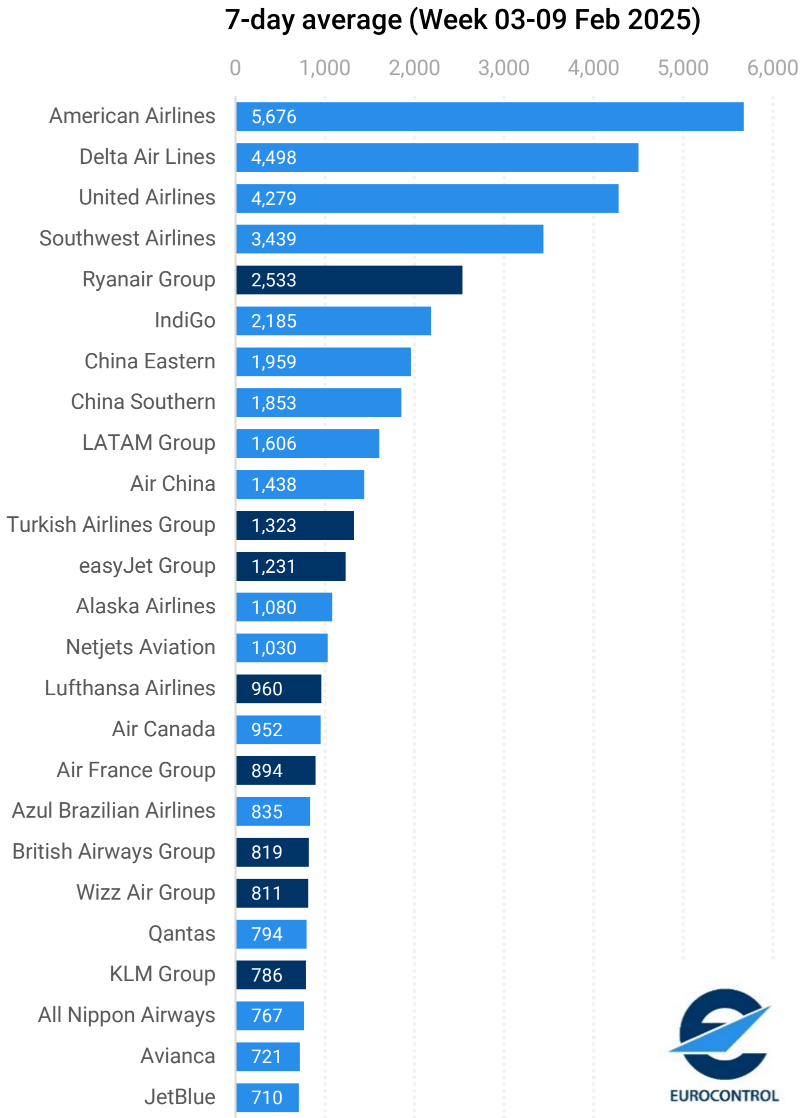
No.	Market segment	Avg. flights	% prev week	% prev year	% 2019
1.	Mainline	9,268	+1%	+6%	-4%
2.	Low Cost	7,796	+9%	+9%	+8%
3.	Regional	3,266	+0%	-2%	-14%
4.	Business	1,599	-4%	-7%	+23%
5.	All-cargo	950	-4%	-3%	+12%
6.	Other	880	+5%	+17%	+92%
7.	Military	509	+3%	+25%	+0%
8.	Non-Scheduled	509	-1%	+5%	+13%

- In the year-to-date, the largest market segment (Mainline) occupies a 38% share, in line with its share in the same period of 2019. The second-largest segment (Low cost) is at 31%, up by 1pp compared with 2019. Regional market share, however, has shrunk by 3pp to 13%, while the 4% market share for All-cargo is comparable to the same period in 2019.
- Over the previous week, the number of passenger flights shows a mixed picture: increases for Low cost (+9%) and Mainline (+1%), stagnation for Regional (0%), and a small decline for Non-scheduled (-1%, mainly owing to a decline in the Saudi Arabia ↔ Türkiye flow). Business aviation (fewer domestic France and Türkiye flows) and All-cargo (declines in the Azerbaijan ↔ China , Germany ↔ UAE and Germany ↔ China flows) both recorded -4% declines compared with the previous week.
- All but two market segments recorded flights above 2019 levels: Business aviation (+23%), Non-scheduled (+13%), All-cargo (+12%) and Low cost (+8%). Mainline and Regional, however, were below their 2019 levels at -4% and -14% respectively.

Top 25 global aircraft operators

(average daily departure flights)





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Source: Flightradar24 Historical Global Utilisation data

- Over the last week, eight European airlines were ranked in the top 25 global aircraft operators – a situation broadly similar to the same week last year.
- Ryanair, the busiest European airline group, is currently 5th, similar to the same week last year.
- Seven more European carriers made the top 25: Turkish Airlines Group (11th), easyJet Group (12th), Lufthansa Airlines (15th), Air France Group (17th), British Airways Group (19th), Wizz Air Group (20th) and KLM Group (22nd).

Top 10 airports

Airport ranking

See more

Week 03-09 Feb 2025

No.	Airport	Avg. daily dep/arr flights	% prev week	% prev year	% 2019
1.	Istanbul	1,336	-4%	+2%	n/a
2.	London Heathrow	1,276	+2%	+3%	+2%
3.	Amsterdam	1,234	+3%	+1%	-2%
4.	Paris Charles de Gaulle	1,143	+2%	+13%	-7%
5.	Madrid Barajas	1,107	+3%	+5%	+5%
6.	Frankfurt	1,021	+2%	+4%	-20%
7.	Barcelona	842	+7%	+8%	+8%
8.	Rome Fiumicino	755	+6%	+13%	-0%
9.	Munich	753	+3%	+10%	-27%
10.	Zurich	626	+3%	+6%	-6%

- Compared with the last EAO of 2024 (issued 12 December), one airport (Istanbul Sabiha Gökçen) has disappeared from the table, with the 10th busiest airport slot now occupied by Zürich.
- Istanbul (1,336 flights per day, -4% vs the previous week) is the busiest airport, followed by London Heathrow (1,276, +2%) and Amsterdam Schiphol (1,234, +3%).
- All of Week 6's top airports recorded more flights than in the same week in 2024, with the highest growth at Paris CDG (+13%, largely owing to Air France adding flights) and Rome Fiumicino (+13%, mostly owing to more Ryanair flights).
- Only 3 top 10 airports (London Heathrow, Madrid and Barcelona) are currently handling traffic above their 2019 levels at the same point in time. *(Here, Istanbul is excluded as it only went into full operations in April 2019).*

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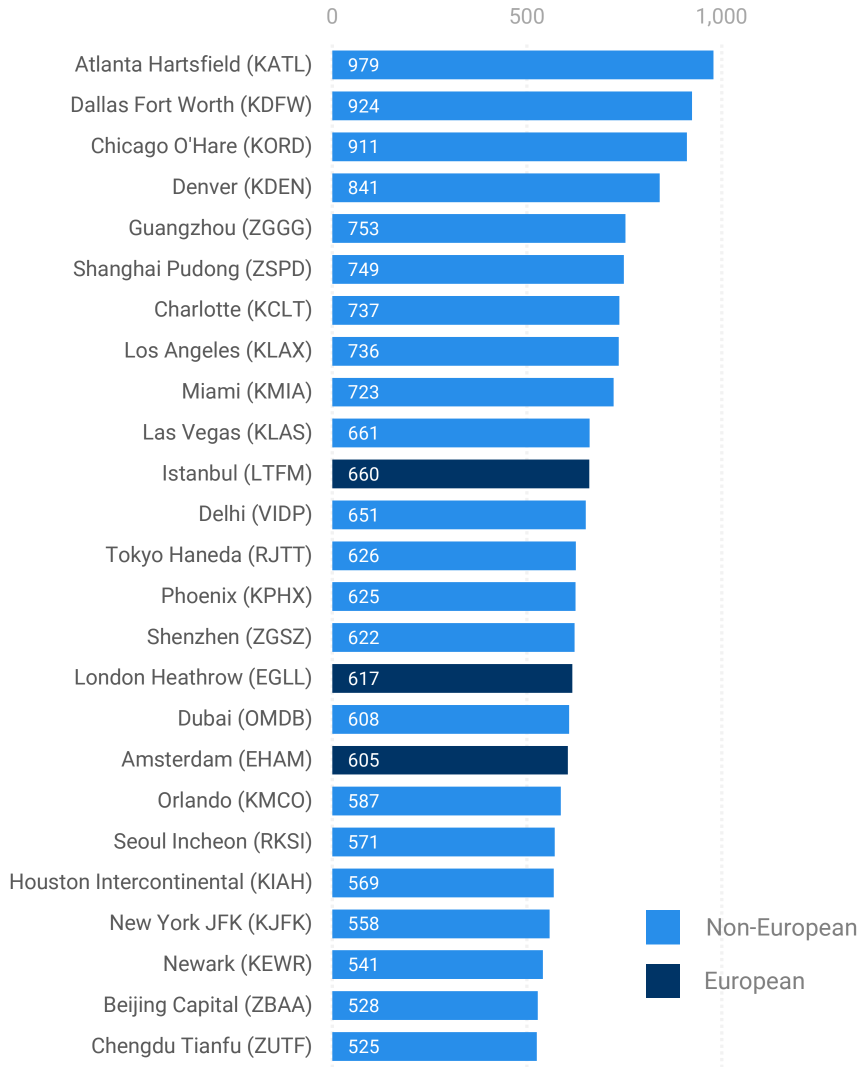
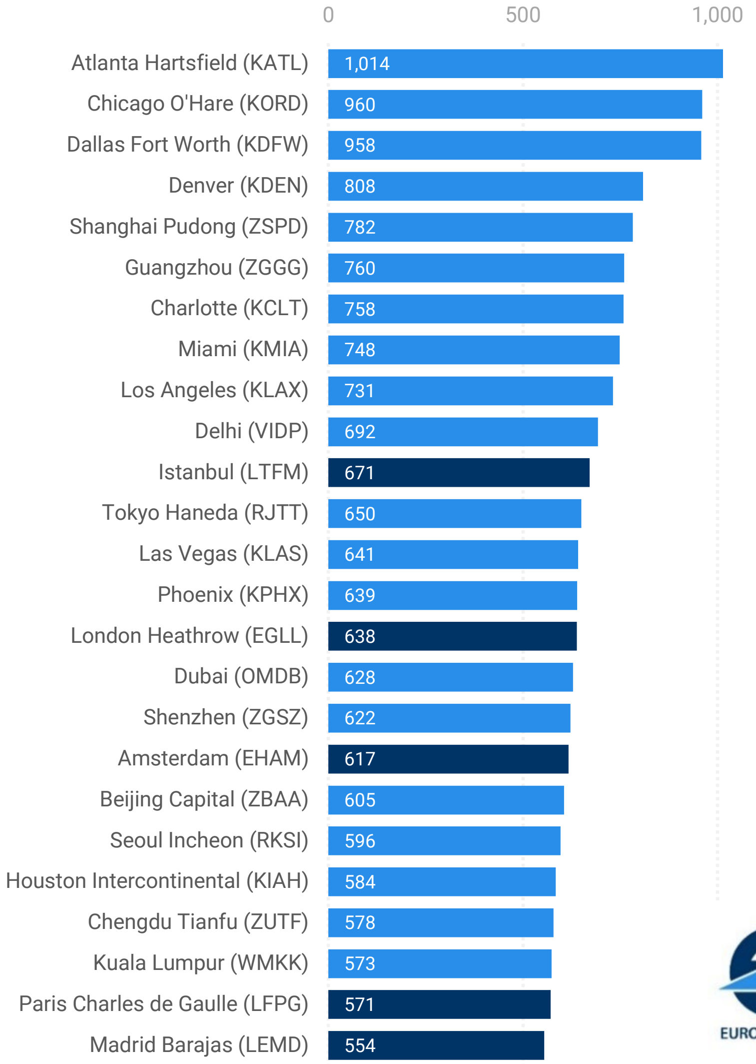
Top 25 global airport departures

(average daily departure flights)

7-day average (Week 03-09 Feb 2024)



7-day average (Week 03-09 Feb 2025)



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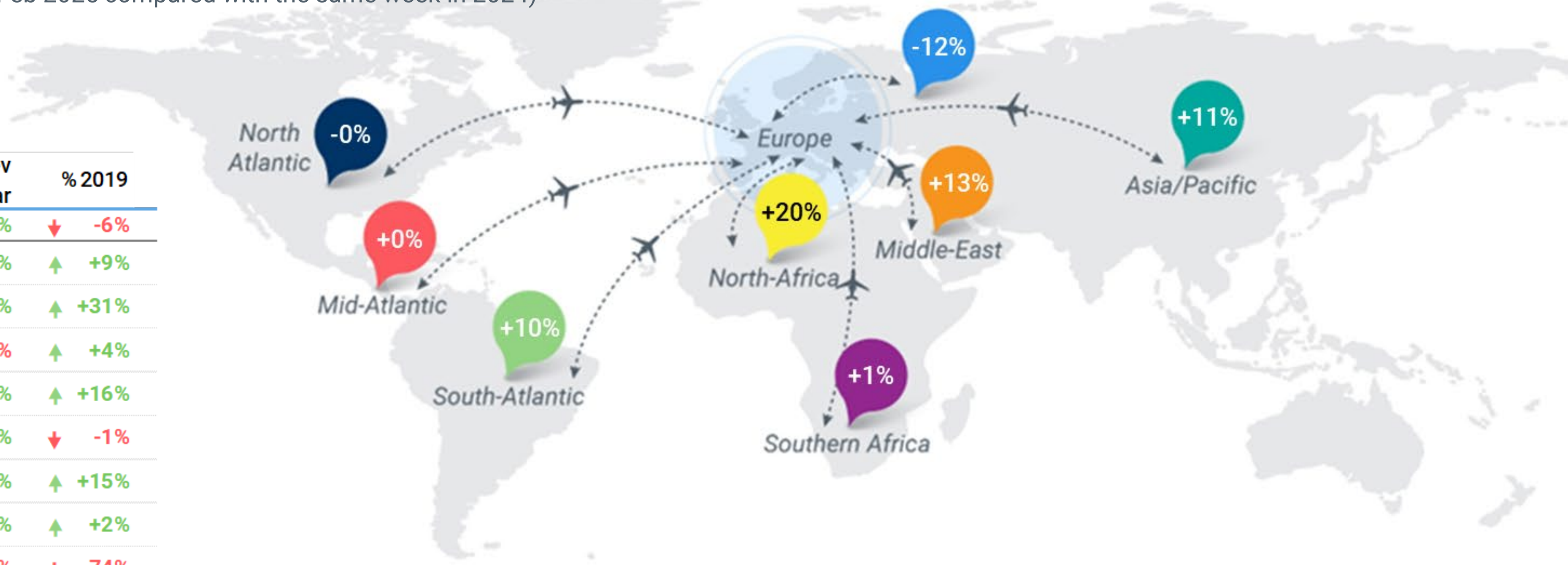
Source: Flightradar24 Historical Global Utilisation data

- Over the last week, five European airports made the top 25 in terms of global airport departures (two more than in the corresponding week in 2024).
- The first European airport to appear is Istanbul (11th), followed by London Heathrow (15th).
- The other European airports in the top 25 are Amsterdam Schiphol (18th), Paris CDG (24th) and Madrid (25th).
- Delhi (10th) is a new Asian airport arrival in the top 10 compared with 2024, alongside Shanghai (5th) and Guangzhou (6th), which have swapped places.

Traffic flows

(change in daily departure/arrival flights for week 03-09 Feb 2025 compared with the same week in 2024)

Region	Average daily flights	% prev week	% prev year	% 2019
Intra-Europe	18,758	+4%	+4%	-6%
Europe ↔ Middle-East	1,379	-2%	+13%	+9%
Europe ↔ North-Africa	1,150	+5%	+20%	+31%
Europe ↔ North Atlantic	921	-1%	-0%	+4%
Europe ↔ Asia/Pacific	841	-1%	+11%	+16%
Europe ↔ Southern Africa	321	-1%	+1%	-1%
Europe ↔ South-Atlantic	202	-1%	+10%	+15%
Europe ↔ Mid-Atlantic	201	+1%	+0%	+2%
Europe ↔ Other Europe	194	-2%	-12%	-74%
Non Intra-Europe	5,209	+0.0%	+9%	+0%



- The main intra-European traffic flow recorded 18,758 daily flights last week, 4% higher than the previous week. Intercontinental flows amounted to 5,209 daily flights on average, in line with the previous week.
- The second-largest flow is with the Middle East, with 1,379 flights per day (-2% compared with the previous week owing to decreases in the Saudi Arabia ↔ Türkiye flow). The flow is recording traffic 13% above the same week in 2024 and +9% vs 2019 levels (despite fewer flights to/from Israel compared with pre-pandemic).
- The third-largest flow is with North Africa, with 1,150 average daily flights (+5% compared with the previous week, owing mainly to increases in the France ↔ Morocco flow).
- The fourth-largest flow is with North America, with 921 daily flights (-1%, owing to decreases on flows between the US and Spain, Türkiye and Germany, as well as the UK).
- The flow between Europe and the Asia/Pacific region (841 flights per day, -1%) shows traffic +11% vs the same week in 2024, and +16% compared with 2019 levels.
- The flow to ‘Other Europe’ (including the Russian Federation) remains massively reduced at -74% compared with 2019.

Top 10 long-haul country pairs

(average daily departure/arrival flights for the last week)

Week 03-09 Feb 2025

No.	Country pair	Average daily flights	% prev week	% prev year	% 2019
1.	UK ↔ US	233	-1%	-2%	-7%
2.	Germany ↔ US	117	-2%	-5%	-14%
3.	France ↔ US	84	-2%	+10%	+1%
4.	UAE ↔ UK	66	+3%	+6%	+6%
5.	Netherlands ↔ US	63	-2%	-10%	+2%
6.	India ↔ UK	50	+4%	+13%	+27%
7.	Russia ↔ UAE	49	+3%	+12%	+2025%
8.	Germany ↔ UAE	44	-3%	+4%	-1%
9.	Spain ↔ US	43	-10%	-1%	+3%
10.	UAE ↔ US	39	+3%	+10%	+23%

- Six of the top 10 long-haul country pairs are with the United States, the main three being between the US and the UK, Germany and France. The non-US related long-haul flows within the top 10 are UAE ↔ UK, India ↔ UK, Russia ↔ UAE and Germany ↔ UAE.
- The top 3 long-haul flows posted declines on the previous week: UK ↔ US (-1%, owing mainly to reduced flows between London Heathrow and New York JFK), Germany ↔ US (-2%, fewer flights between Cincinnati and Leipzig or Charlotte and Munich) and France ↔ US (-2%, owing to fewer flights between New York Newark and Orly and reduced business aviation flights).
- All but four of the top long-haul flows recorded more traffic vs 2024 with double-digit increases on India ↔ UK, Russia ↔ UAE, but also France ↔ US and UAE ↔ US.
- Seven flows are currently above 2019 levels, notably Russia ↔ UAE, India ↔ UK (+27%) and UAE ↔ US (+23%).

Economics

Week 03-09 Feb 2025

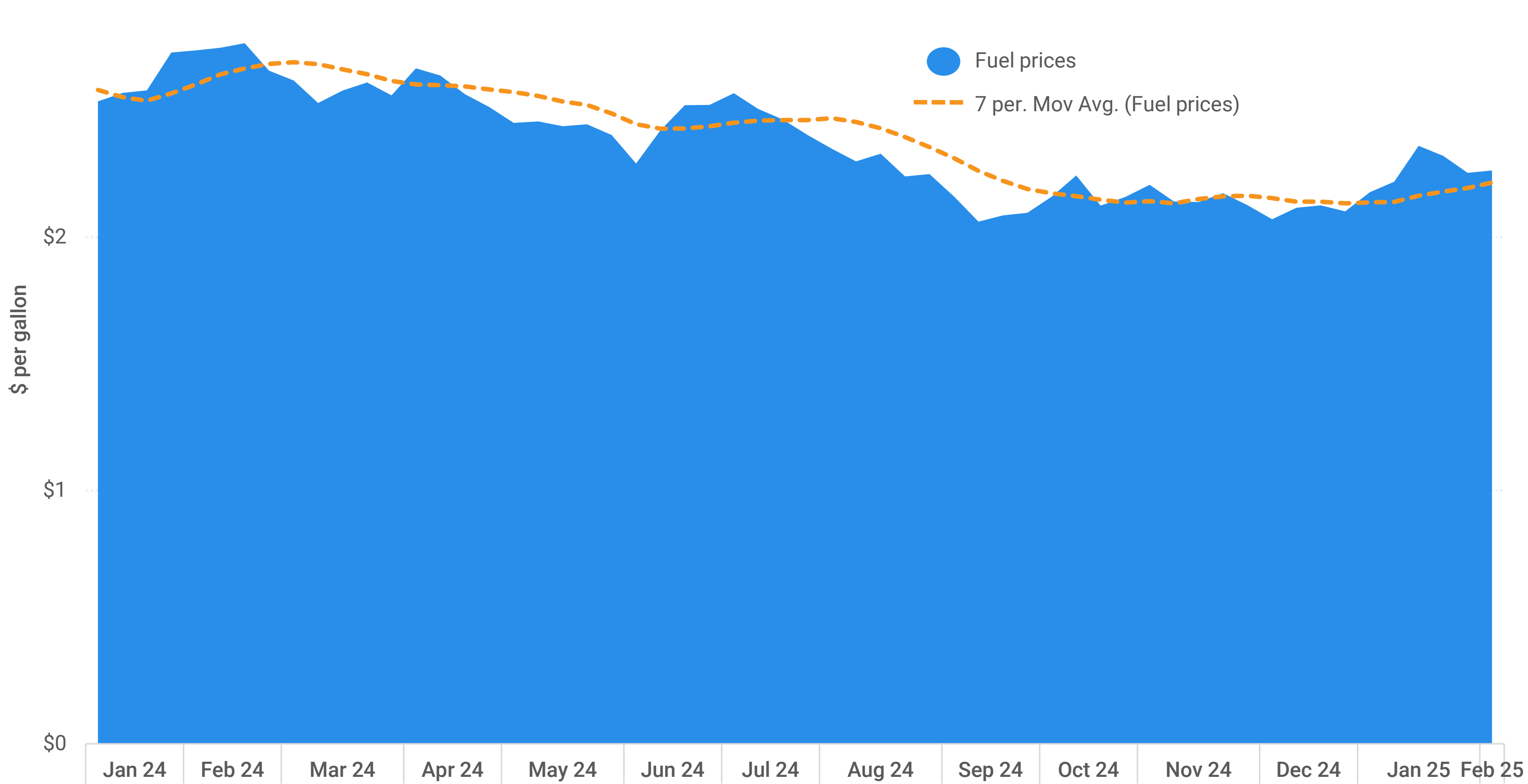
07 Feb 2025
avg fuel price:

$2.26 /gallon

9%
vs. $2.07 /gallon
on 06 Dec 2024

Source: IATA/Platts

Jet fuel price (Europe)



Source: IATA/Platts

- The average price of jet fuel closed at 2.26 USD/gallon on 07 February 2025, a 9% decrease compared with the level of early December (the last bi-weekly edition of the EAO).
- Since early 2024, the 7-day average fuel price has generally been decreasing, with the exception of increases in January and June 2024, and January 2025. Since November 2023, OPEC+ members, which pump about half of the world's oil, have agreed voluntary output cuts of 2.2 million barrels/day to support the market. While these cuts were expected to be gradually phased out on a monthly basis as from December 2024, members recently agreed to push back the start of oil output rises until April 2025, and extended the full unwinding of cuts by a year until the end of 2026, due to weak demand and booming production outside the group.

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To further assist you in your analysis, EUROCONTROL provides the following additional information on a daily basis (daily updates at 8:45 CET for the first item) and every Friday for the last item:

1. EUROCONTROL Aviation Intelligence Portal:
www.eurocontrol.int/Economics/
This dashboard provides daily performance data on Day+1 for all European States; for the largest airports; for each Area Control Centre (ACC) and the largest airline operators.

2. EUROCONTROL Data App: Available at Android Play and Apple Store.
This app provides daily performance data on Day+1 at network level and top stakeholders.

Google Play

Apple Store

3. EUROCONTROL "Our Data" Portal:
www.eurocontrol.int/our-data/
This webpage provides an overview of key charts and publications related to European aviation performance.

4. Rolling Seasonal Plan:
www.eurocontrol.int/publication/european-network-operations-plan-2025-rolling-seasonal-plan
This Rolling Seasonal Plan covers a rolling six or eight-week period. It plays a major role in helping European aviation by providing key actors with the global view they need to plan effectively.

For more information please contact aviation.intelligence@eurocontrol.int

www.eurocontrol.int