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EUROPEAN AVIATION OVERVIEW

17-23 Feb 2025

Wednesday 26 February 2025

Headlines

(Week 17-23 Feb 2025)

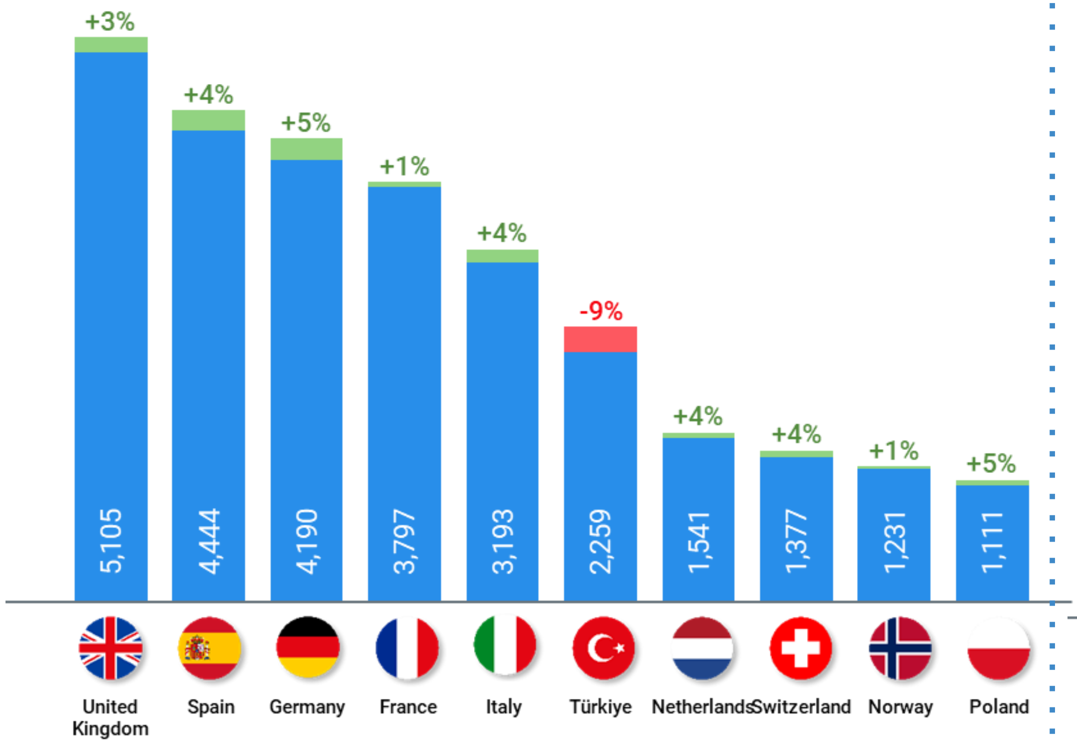
- The network recorded 26,079 average daily flights (+7% vs 2024).
- Aggregate traffic was 2.2% higher week-on-week across the top 10 States, with all States (except Türkiye) recording higher numbers of flights.
- Year-to-date traffic is 95% of 2019, 5% more than 2024.
- En-route ATFM delays were slightly lower than in the previous week (-9%), with an average just below 14,000 daily minutes. They were 71% higher than in 2024 and represent, on average, 0.54 min/flight.
- 'ATC capacity/staffing' was the top delay cause last week (84% of all en-route ATFM delays), followed by 'Others' (15%, including the system transition at Paris ACC).
- The average jet fuel price stood at 2.26 USD/gallon on 21 February, the same as two weeks earlier.
- EUROCONTROL billed 791M€ in en-route charges in January 2025, 20% above the amount billed for January 2024 flights, reflecting more service units (+7%) and higher unit rates (+11%). The average distance per flight continued to increase (+1.8% in January 2025 vs January 2024) whereas the average weight per flight slightly decreased (-0.1%).

For technical reasons, the punctuality data for this week were not yet available at the time of publication of this edition

Top 10 busiest States

On week 17-23 Feb 2025

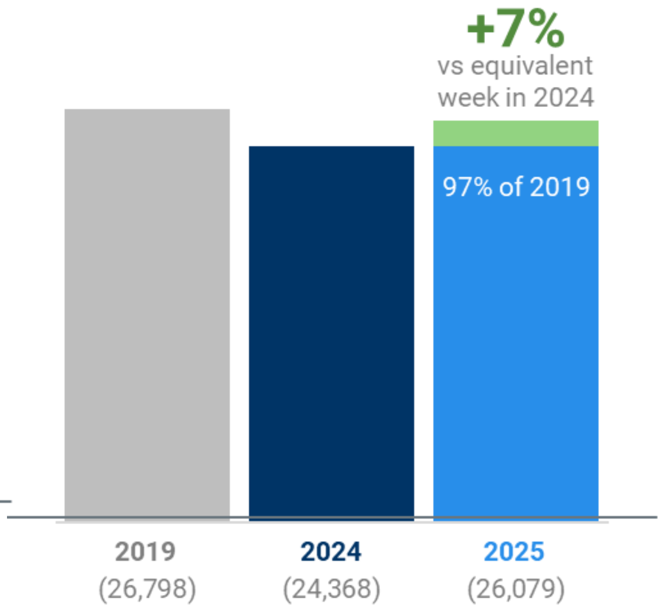
(all flights excl. overflights compared with previous week)



Traffic situation

Average daily flights (including overflights)

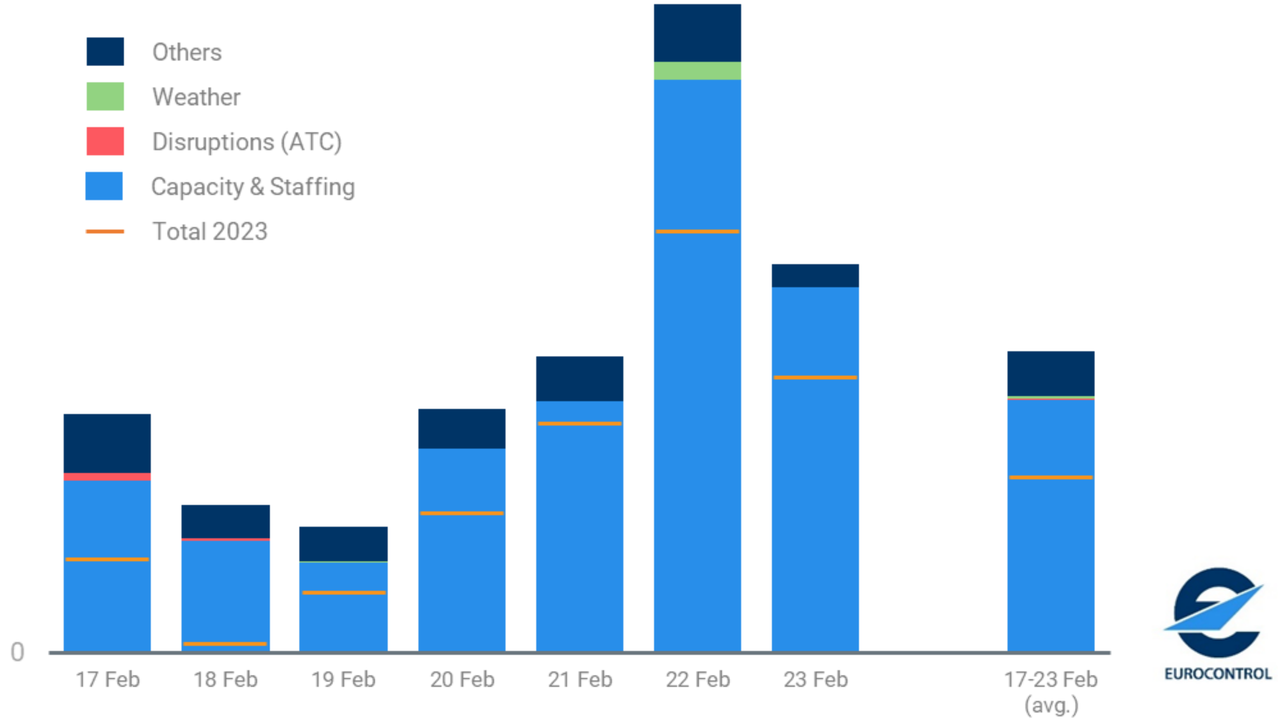
Week 17-23 Feb 2025



En-route ATFM delays

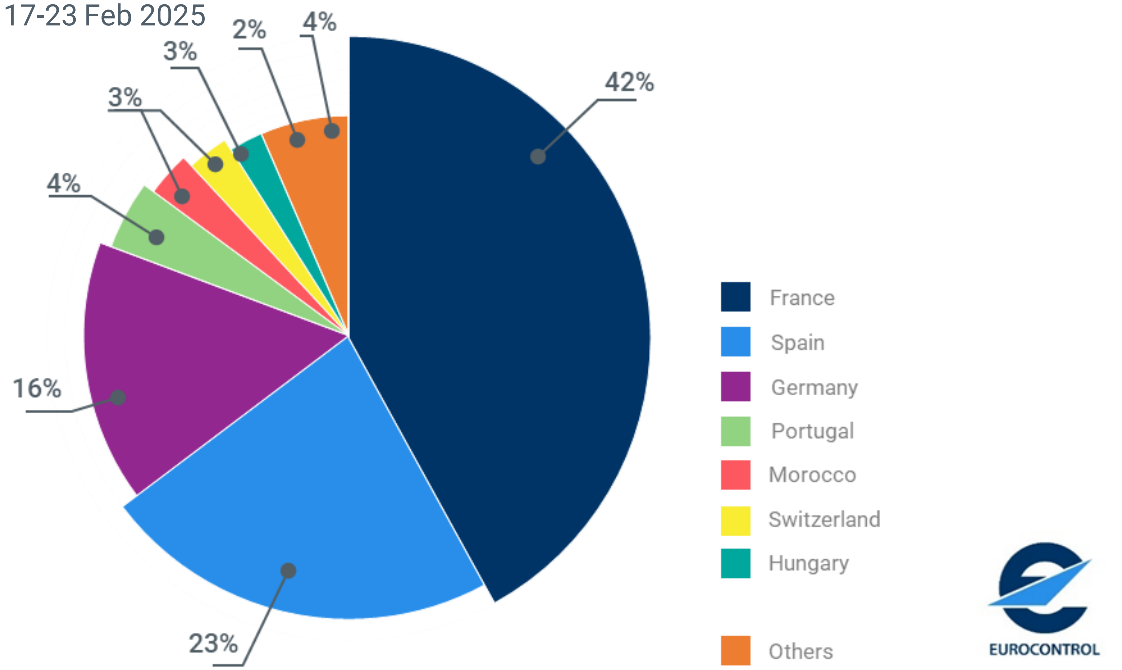
Delays per cause (EUROCONTROL Area)

In minutes (total daily and 7-day average) in 2025



Share of en-route ATFM delays

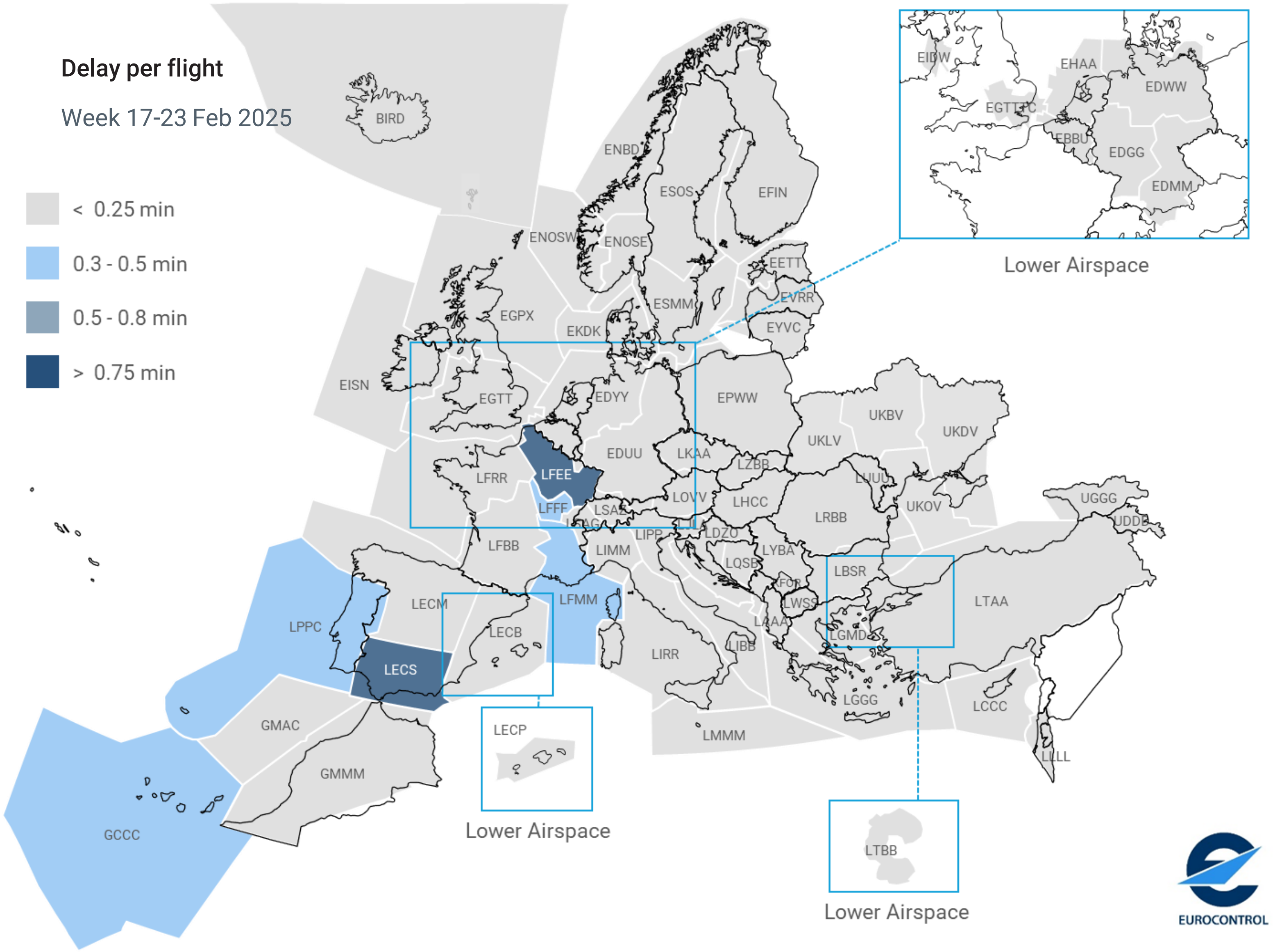
Week 17-23 Feb 2025



- Week 8 (17 - 23 Feb) registered fewer delays than Week 7, with an average of 13,981 daily minutes. However, these en-route ATFM delays were 71% higher than for the same operational week of 2024.
- ATC capacity/staffing were responsible for 84% of all en-route ATFM delays, especially in France (Reims ACC, Marseille ACC and TMA) but also in Seville ACC, followed by "Others", which accounted for 15% of all en-route ATFM delays (e.g. system implementation deployment).
- Total ATFM delay was just below 1.0 min/flight in Week 8, made up of 0.54 min/flight en-route delay and 0.37 min/flight airport. Total ATFM delay was 1% lower than in Week 7.

- France accounted for 42% of all en-route ATFM delays, primarily due to some staffing issues limiting sector availability in Reims ACC and Marseille ACC during the week-end. Paris ACC continues to be affected by the 2nd phase of the transition to the "4-Flight ATM system" implementation.
- Spain accounted for 23% of all en-route ATFM delays, mostly driven by staffing & capacity issues in Seville ACC as well as in Madrid (CTA+TMA) and Barcelona ACC.
- Germany accounted for 16% of all en-route ATFM delays, largely due to capacity and staffing issues in Munich ACC, Karlsruhe UAC and Langen ACC.

En-route ATFM delayed flights per Area Control Centre



- In Week 8 (17 - 23 February), no ACCs recorded en-route ATFM delays higher than 1.0 min/flight.
- Seville ACC recorded 0.99 min/flight. Traffic was 44% above 2019 levels, prompting capacity delays. The centre was impacted by high demand exceeding available sector capacities.
- Reims ACC recorded 0.79 min/flight. The centre recorded sector capacity issues on Saturday and Sunday with additional traffic due to the Winter mid-term break in the United Kingdom.
- Canaries ACC recorded 0.46min/flight. Traffic was 25% above 2019 levels, prompting capacity delays.
- Paris ACC recorded 0.37 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). Sector capacities have improved to 90% of their nominal values, and some route restrictions for overflights were relaxed this last weekend.

Top 10 States

See more

Departures and arrivals

Week 17-23 Feb 2025

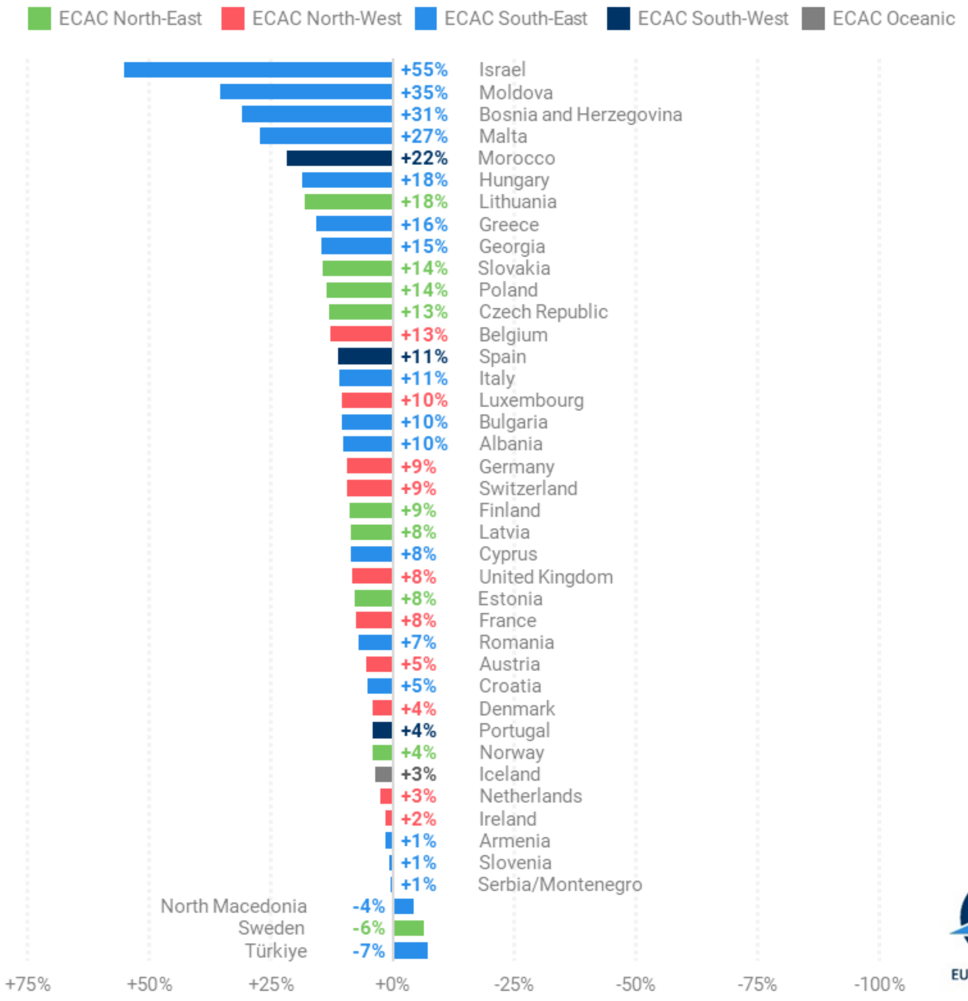
No.	Country	Average daily flights	% prev week	% prev year	% 2019
1.	United Kingdom	5,105	+3%	+8%	-5%
2.	Spain	4,444	+4%	+11%	+17%
3.	Germany	4,190	+5%	+9%	-20%
4.	France	3,797	+1%	+8%	-1%
5.	Italy	3,193	+4%	+11%	+7%
6.	Türkiye	2,259	-9%	-7%	+4%
7.	Netherlands	1,541	+4%	+3%	-1%
8.	Switzerland	1,377	+4%	+9%	-2%
9.	Norway	1,231	+1%	+4%	-8%
10.	Poland	1,111	+5%	+14%	+14%

- The top 10 States, in aggregate, recorded 2.2% more flights than in the previous week.
- Germany recorded the greatest increase (+5%, mainly due to more flights by Lufthansa and Ryanair) on domestic flows and mainly on flows with Spain and Switzerland.
- Türkiye recorded a decline (-9%), mainly on Turkish Airlines flights and on domestic flows: Turkish Airlines canceled a significant part of its flight schedule last week due to adverse winter weather in Istanbul, which disrupted airport operations.
- Four States in the top 10 are recording traffic above 2019 levels (Spain, Poland, Italy and Türkiye), with the remainder between 1% and 20% below pre-COVID levels.

States in the EUROCONTROL Network

Compared to the equivalent week in 2024

Dep/Arr flights for week 17-23 Feb 2025



*Based on integrated ANSP

Top 10 aircraft operators

See more

Week 17-23 Feb 2025 (avg daily flights)

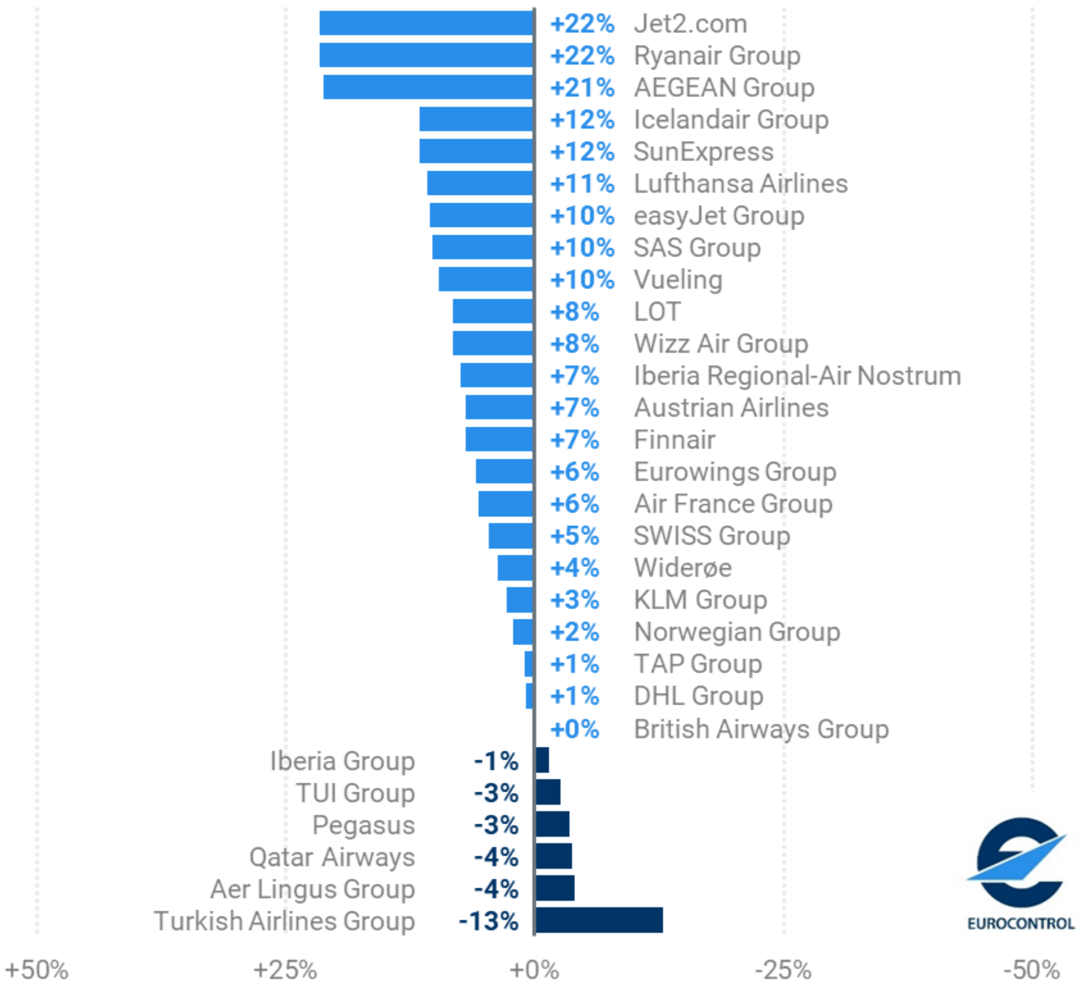
No.	Aircraft operator	Average daily flights	% prev week	% prev year	% 2019
1.	Ryanair Group	2,722	+8%	+22%	+42%
2.	easyJet Group	1,514	+4%	+10%	-2%
3.	Turkish Airlines Group	1,148	-15%	-13%	-7%
4.	Lufthansa Airlines	1,057	+3%	+11%	-29%
5.	Air France Group	958	+0%	+6%	-15%
6.	KLM Group	836	+4%	+3%	+6%
7.	British Airways Group	815	+0%	+0%	-9%
8.	Wizz Air Group	781	-0%	+8%	+66%
9.	SAS Group	616	+1%	+10%	-23%
10.	Vueling	568	+2%	+10%	+18%

- The top 10 aircraft operators, in aggregate, recorded 1.3% more flights than in the previous week.
- All but two of the top 10 aircraft operators recorded more flights than during the previous week.
- Ryanair increased by far the most (+8%), mainly on the flows Spain ↔ UK, Italy ↔ Spain and Poland ↔ UK.
- Turkish Airlines decreased by 15% (heavy snowfall caused significant disruption to air traffic in Türkiye) with declines on domestic flows as well as on flows Germany ↔ Türkiye and Italy ↔ Türkiye.
- Compared with 2024, all the main airlines/airline groups except Turkish Airlines recorded more flights – with four of the top 10 carriers/groups (Wizz Air, Ryanair, Vueling and KLM Group) flying more than in 2019.
- The highest traffic increase compared to the same week in 2024 is for Jet2.com and Ryanair Group (+22% each) while the largest decrease is for Turkish Airlines Group (-13%).

Aircraft operators in the EUROCONTROL Network

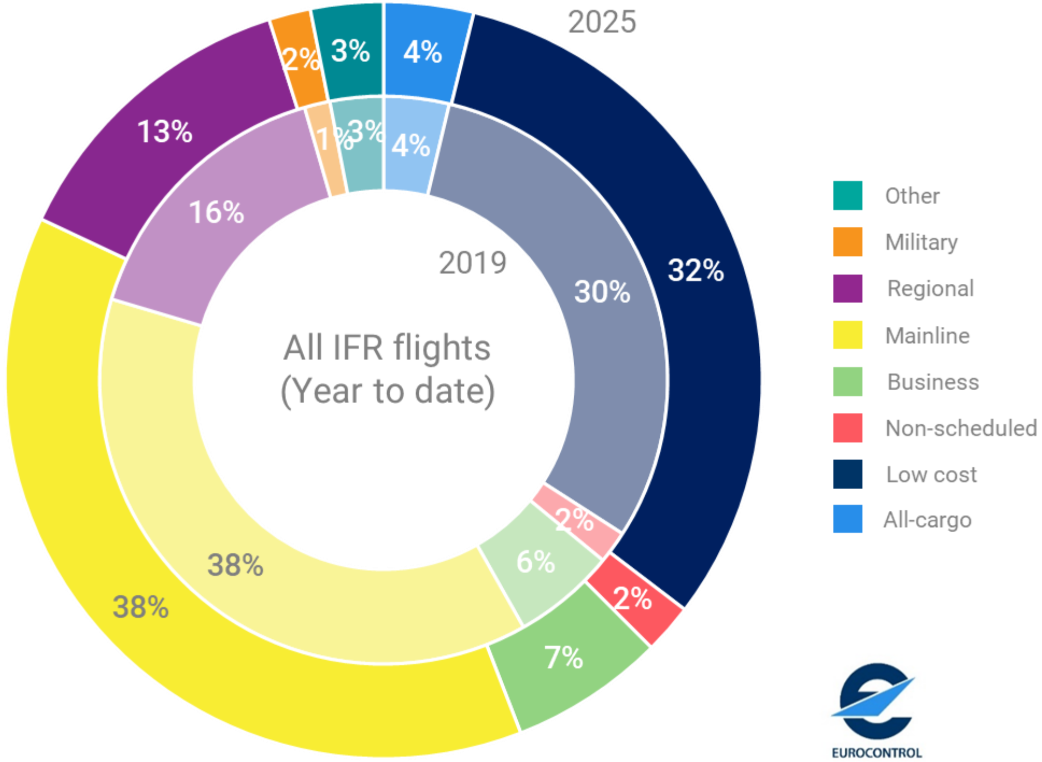
Compared to the equivalent week in 2024

Dep/Arr flights for week 17-23 Feb 2025



Market segments in the EUROCONTROL Network

Average share of total flights (year to date)

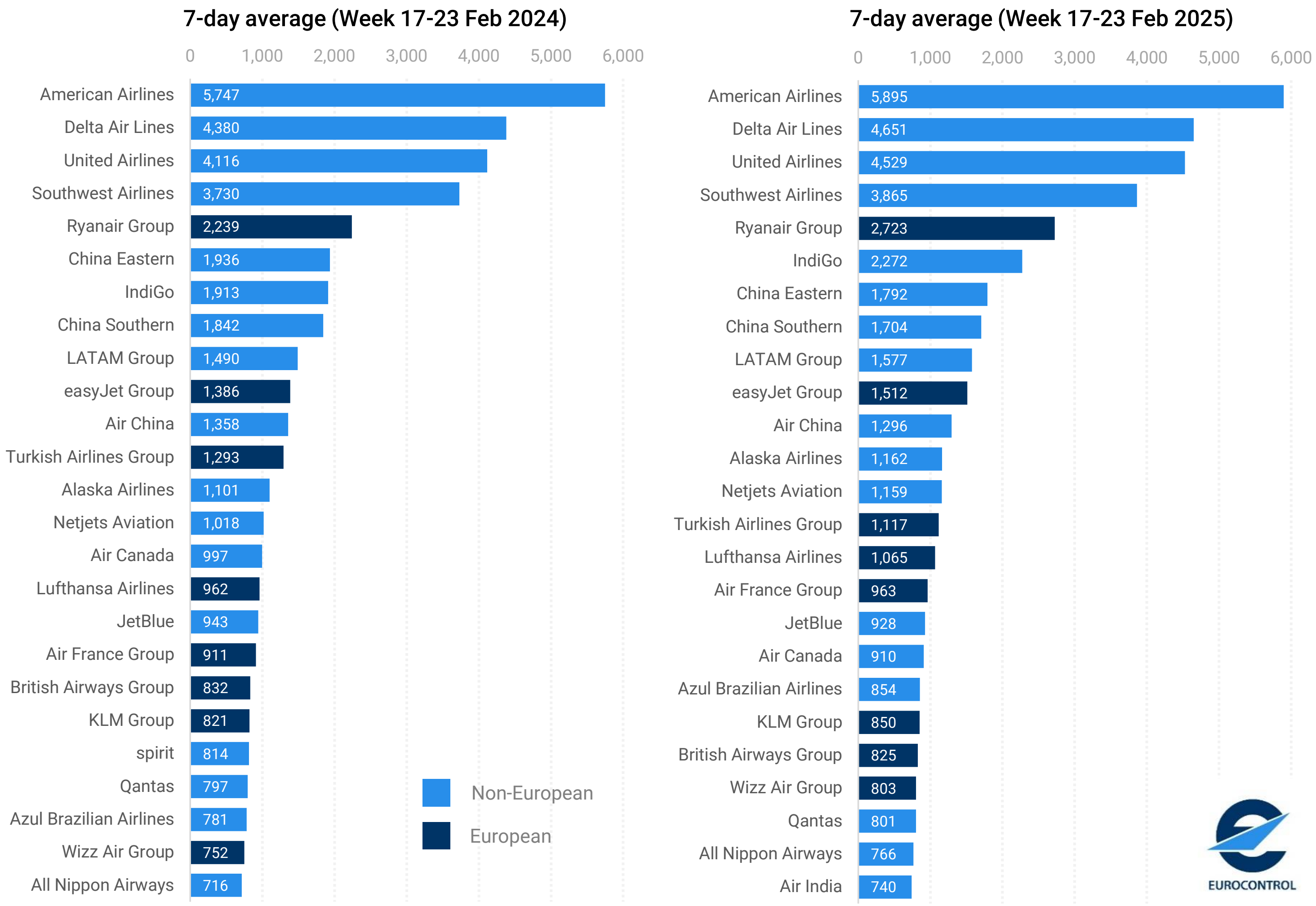


No.	Market segment	Avg. flights	% prev week	% prev year	% 2019
1.	Mainline	9,354	-1%	+4%	-5%
2.	Low Cost	8,534	+4%	+12%	+8%
3.	Regional	3,384	+1%	+1%	-12%
4.	Business	1,797	+0%	+3%	+10%
5.	All-cargo	999	+2%	+6%	+8%
6.	Other	939	+20%	+20%	-9%
7.	Non-Scheduled	582	+14%	+15%	+21%
8.	Military	490	-0%	+18%	-5%

- For 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 32%, up by 2 pp 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 (+4%), Non-scheduled (+14%) and Regional (+1%), and a small decline for Mainline (-1%, mainly owing to the decline on Turkish Airlines). Business aviation remained unchanged compared to previous week. All-cargo (+2%) recorded more flights on flows Belgium ↔ US, Belgium ↔China and Belgium ↔ Denmark compared with the previous week.
- Four market segments recorded flights above 2019 levels: Non-scheduled (+21%), Business Aviation (+10%), All-cargo (+8%) and Low cost (+8%). Mainline and Regional, however, were below their 2019 levels at -5% and -12% respectively.

Top 25 global aircraft operators

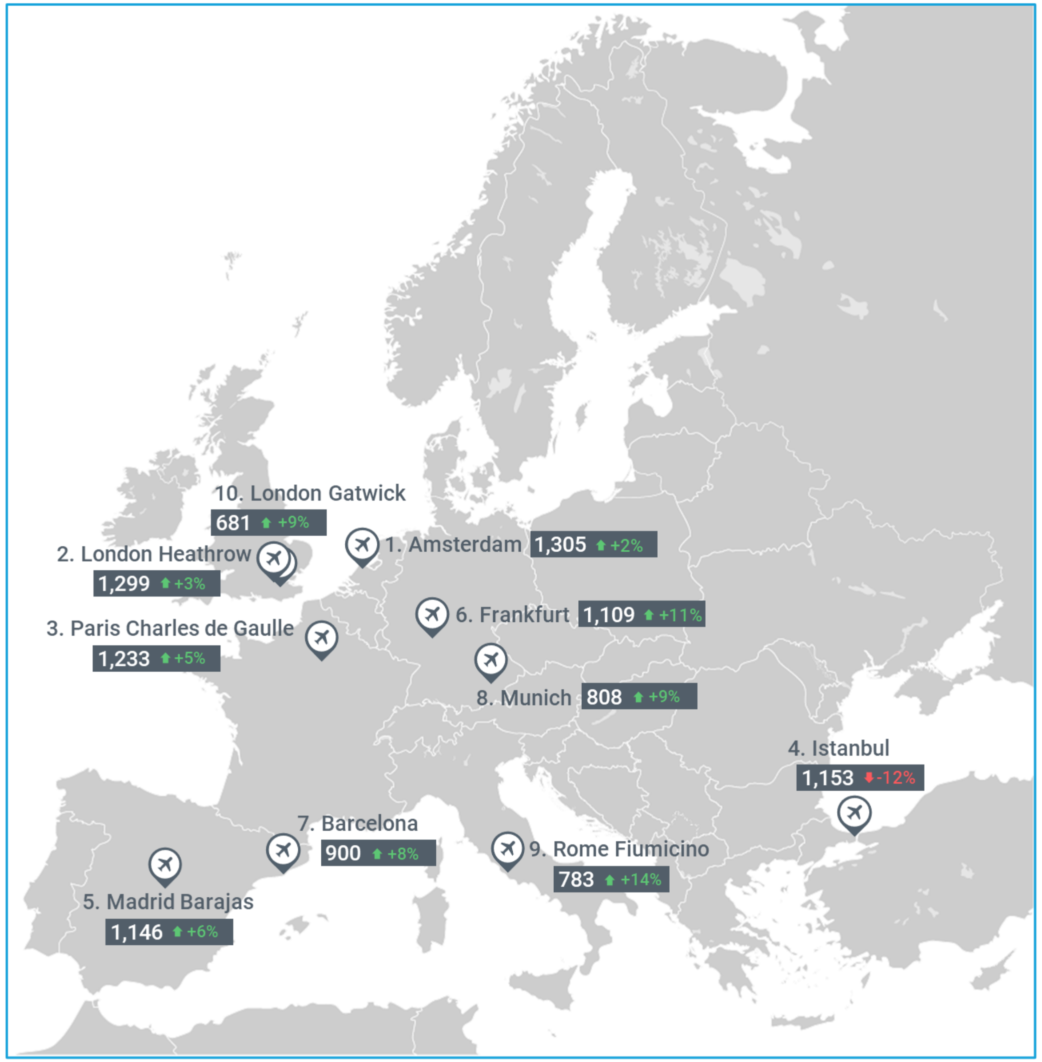
(average daily departure flights)



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.
- Two European airline groups are ranked in the top 10: Ryanair Group, the busiest European airline group, is currently 5th and easyJet Group is 10th. These are the same rankings as in the same week last year
- Six more European carriers made the top 25: Turkish Airlines Group (14th), Lufthansa Airlines (15th), Air France Group (16th), KLM Group (20th), British Airways Group (21st) and Wizz Air Group (22nd).

Top 10 airports



Airport ranking

See more

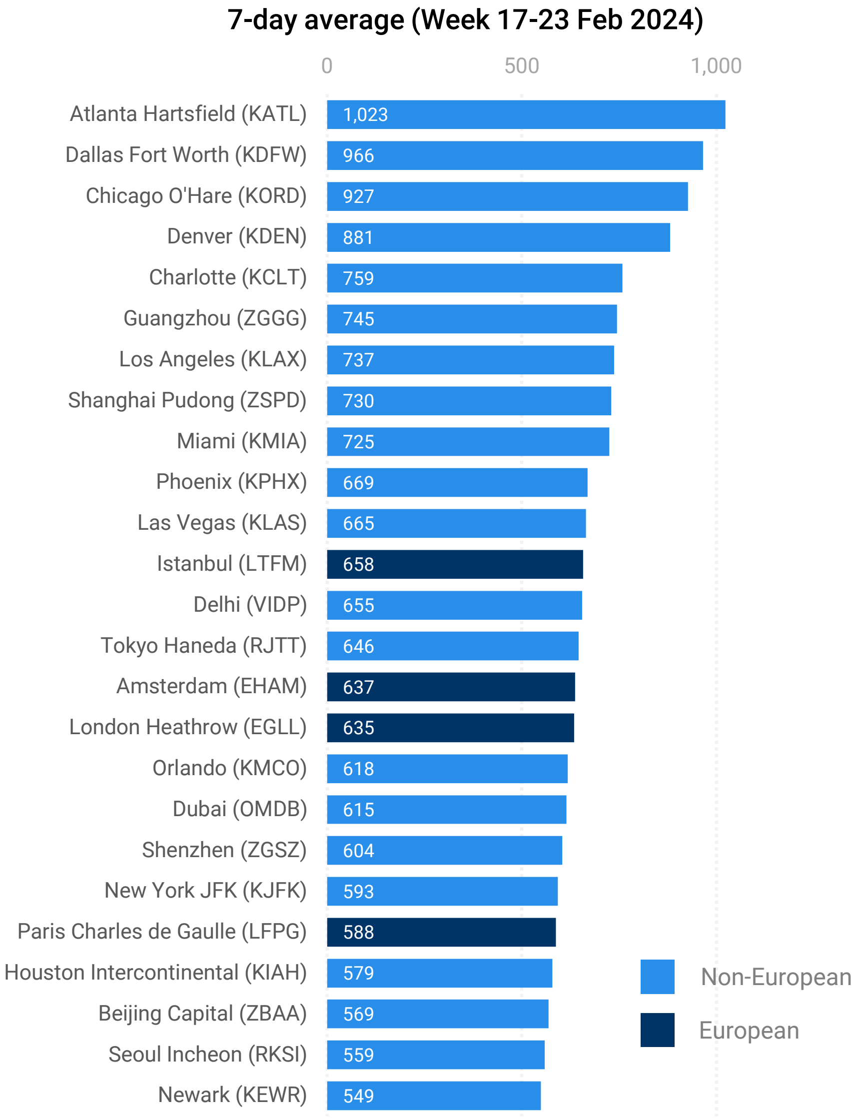
Week 17-23 Feb 2025

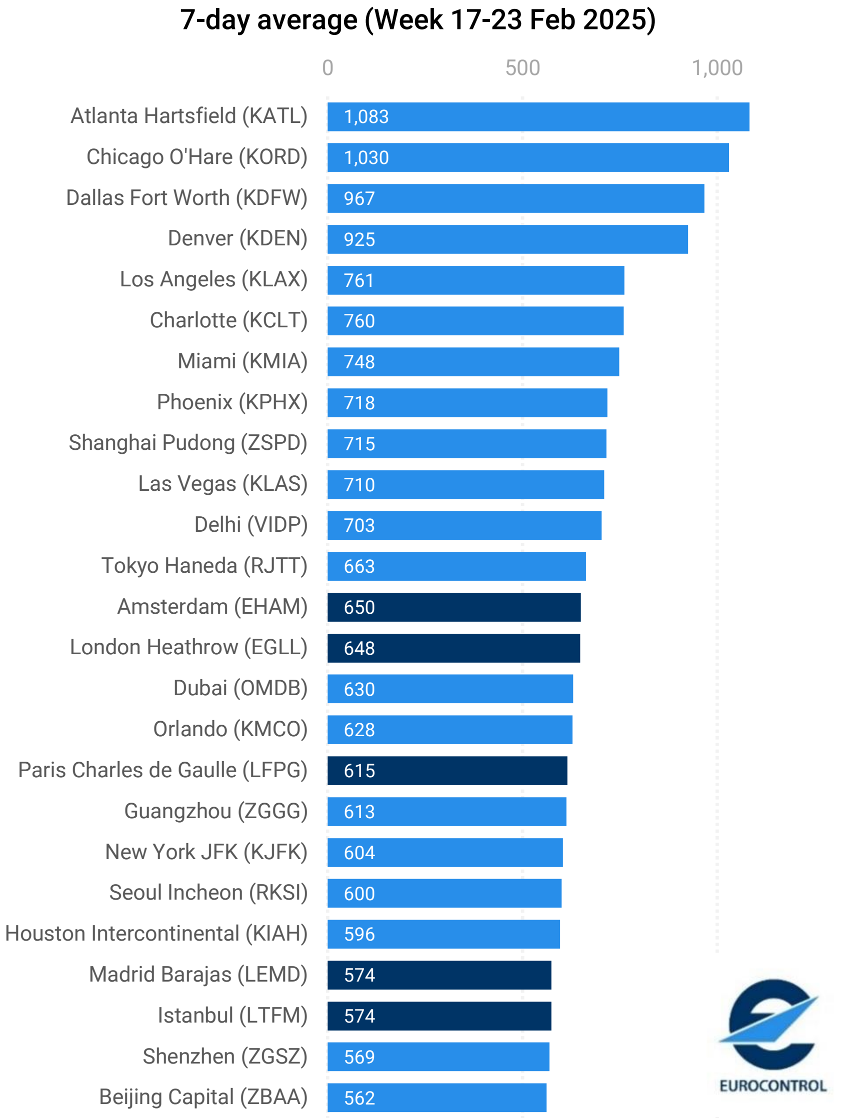
No.	Airport	Avg. daily dep/arr flights	% prev week	% prev year	% 2019
1.	Amsterdam	1,305	+3%	+2%	-1%
2.	London Heathrow	1,299	+1%	+3%	+1%
3.	Paris Charles de Gaulle	1,233	+1%	+5%	-4%
4.	Istanbul	1,153	-14%	-12%	n/a
5.	Madrid Barajas	1,146	+2%	+6%	+5%
6.	Frankfurt	1,109	+3%	+11%	-17%
7.	Barcelona	900	+3%	+8%	+8%
8.	Munich	808	-3%	+9%	-26%
9.	Rome Fiumicino	783	+3%	+14%	-1%
10.	London Gatwick	681	+7%	+9%	-7%

- Compared with the last edition, there were some changes in the top 10: Istanbul conceded the first place to Amsterdam Schiphol, Paris CDG moved one place up. Munich and Rome swapped places and Zurich has disappeared from the table, with the 10th busiest airport slot now occupied by London Gatwick.
- Amsterdam Schiphol (1,305 flights per day, +3% vs the previous week) is the busiest airport, followed by London Heathrow (1,299, +1%) and Paris CDG (1,233, +1%).
- All of Week 8’s top airports (except Istanbul) recorded more flights than in the same week in 2024, with the highest growth at Rome Fiumicino (+14%, largely owing to Ryanair Group adding flights, mainly on France ↔ Italy and Spain ↔ Italy).
- Only 3 top 10 airports (Barcelona, Madrid and London Heathrow) 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).

Top 25 global airport departures

(average daily departure flights)





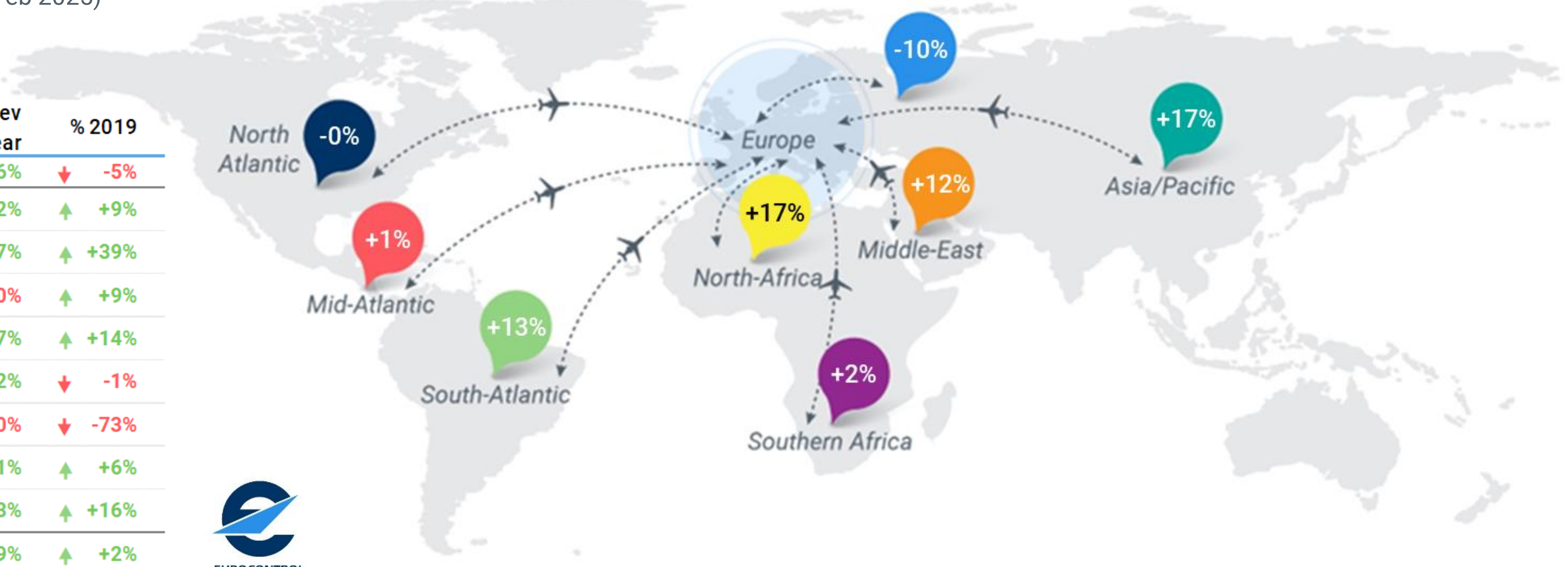
Source: Flightradar24 Historical Global Utilisation data

- Over the last week, five European airports made the top 25 in terms of global airport departures (one more than in the corresponding week in 2024).
- There are two European airports in the top 15: Amsterdam Schiphol (13th) and London Heathrow (14th) have moved up in the ranking compared to the same week last year.
- Due to the weather disruption in Türkiye (heavy snowfall), Istanbul was ranked 23rd.
- The other European airports in the top 25 are Paris CDG (17th) and Madrid (22nd).
- The top 10 global airport ranking is dominated by US airports, with the exception being Shanghai Pudong airport (9th).

Traffic flows

(average daily departure/arrival flights for week 17-23 Feb 2025)

Region	Average daily flights	% prev week	% prev year	% 2019
Intra-Europe	19,767	+2%	+6%	-5%
Europe ↔ Middle-East	1,399	+2%	+12%	+9%
Europe ↔ North-Africa	1,266	+4%	+17%	+39%
Europe ↔ North Atlantic	993	+5%	-0%	+9%
Europe ↔ Asia/Pacific	874	+1%	+17%	+14%
Europe ↔ Southern Africa	321	-0%	+2%	-1%
Europe ↔ Other Europe	206	+3%	-10%	-73%
Europe ↔ Mid-Atlantic	205	-1%	+1%	+6%
Europe ↔ South-Atlantic	202	+0%	+13%	+16%
Non Intra-Europe	5,466	+2%	+9%	+2%



- The main intra-European traffic flow recorded 19,767 daily flights last week, 2% higher than the previous week. Intercontinental flows amounted to 5,466 daily flights on average, 2% higher than the previous week.
- The second-largest flow is with the Middle East, with 1,399 flights per day (+2% compared with the previous week owing to increases in the Saudi Arabia ↔ Türkiye flow). The flow is recording traffic 12% 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 1,266 average daily flights (+4% compared with the previous week, owing mainly to increases in the France ↔ Morocco and the France ↔ Tunisia flows).
- The fourth-largest flow is with North America, with 993 daily flights (+5%, owing to increases on flows between the US and Spain, Portugal, UK and Italy).
- The flow between Europe and the Asia/Pacific region (874 flights per day, +1%) shows traffic +17% vs the same week in 2024, and +14% compared with 2019 levels.
- The flow to 'Other Europe' (including the Russian Federation) remains massively reduced at -73% compared with 2019.

Top 10 long-haul country pairs

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

Week 17-23 Feb 2025

No.	Country pair	Average daily flights	% prev week	% prev year	% 2019
1.	UK ↔ US	248	+2%	-0%	-5%
2.	Germany ↔ US	128	+2%	+4%	-6%
3.	France ↔ US	92	+2%	-3%	+9%
4.	Netherlands ↔ US	66	+2%	-5%	+6%
5.	UAE ↔ UK	65	-1%	+4%	+3%
6.	Russia ↔ UAE	53	+5%	+20%	+1950%
7.	Spain ↔ US	50	+14%	+6%	+15%
8.	India ↔ UK	50	-0%	+14%	+27%
9.	Germany ↔ UAE	45	-3%	+9%	-4%
10.	Egypt ↔ Russia	39	+11%	+36%	n/a

- Half 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, Russia ↔ UAE, India ↔ UK, Germany ↔ UAE and Egypt ↔Russia.
- The top 3 long-haul flows posted increases on the previous week: UK ↔ US, Germany ↔ US and France ↔ US (+2%, each.
- All but three of the top long-haul flows recorded more traffic vs 2024 with double-digit increases on Egypt ↔ Russia, Russia ↔ UAE and India ↔ UK.
- Six flows are currently above 2019 levels, notably Russia ↔ UAE, India ↔ UK (+27%) and Spain ↔ US (+15%).

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Economics

Week 17-23 Feb 2025

21 Feb 2025
avg fuel price:

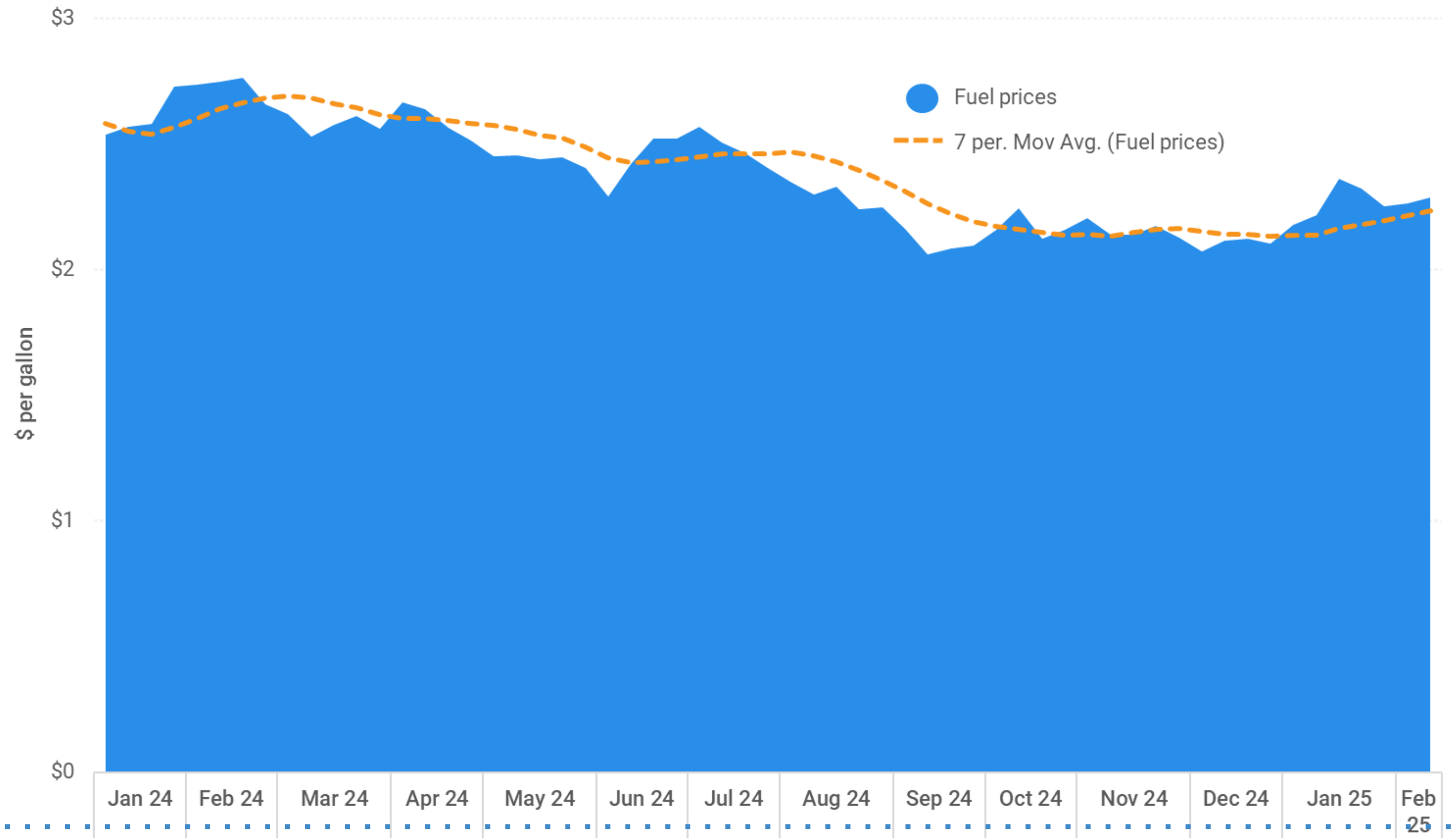
$2.26 /gallon

0%

vs. $2.26 /gallon
on 07 Feb 2025

Source: IATA/Platts

Jet fuel price (Europe)

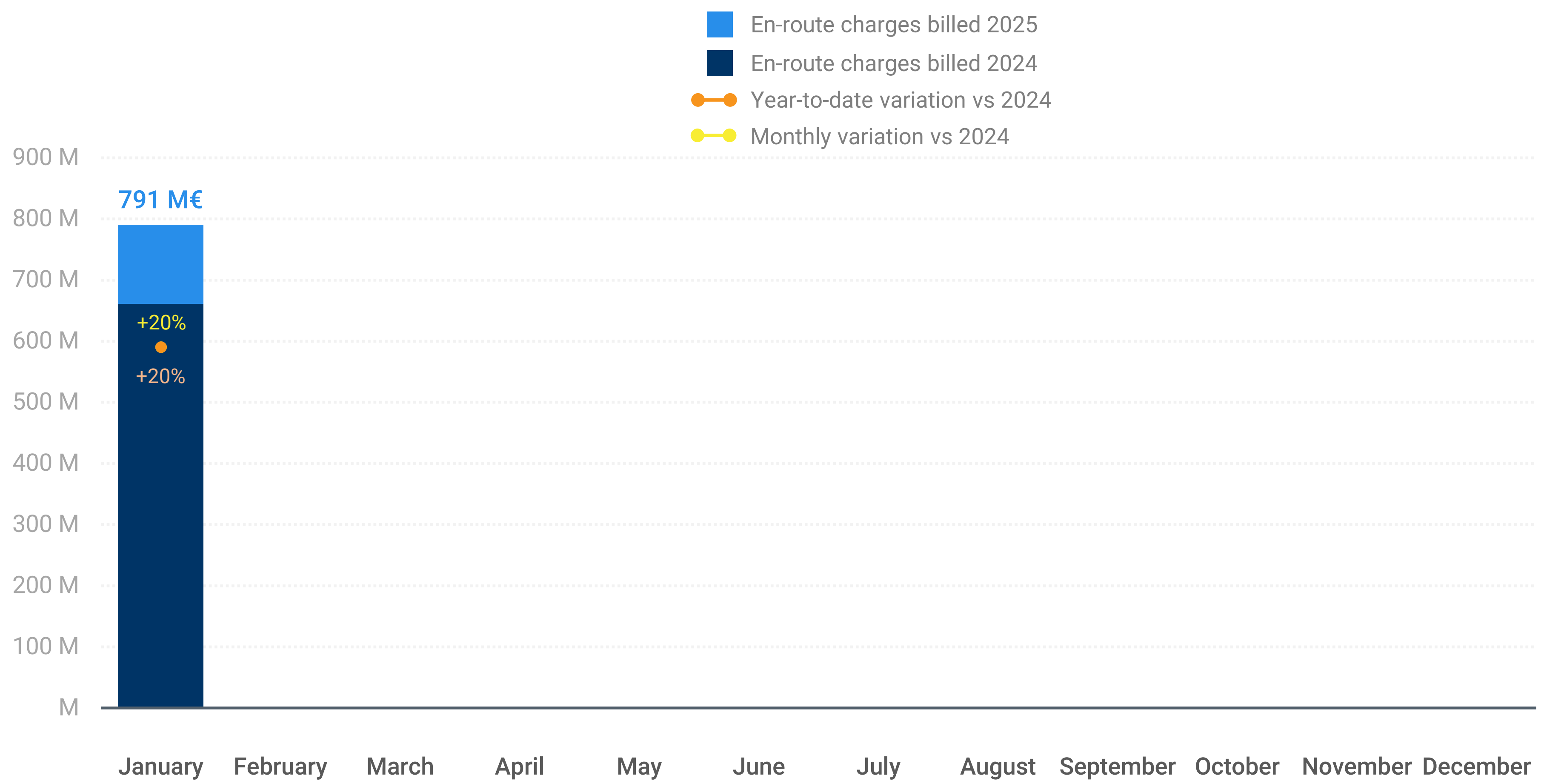


Source: IATA/Platts

- The average price of jet fuel closed at 2.26 USD/gallon on 21 February 2025, unchanged compared with the level of two weeks ago.
- Since early 2024, the 7-day average fuel price has generally been decreasing, with the exception of increases in during the first part of 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.

En-route air navigation charges for the EUROCONTROL Area (2025)

Year-to-date amount billed: 791 M€ (+20% vs 2024)



- At Network level, 791€ were billed for January 2025 which represents +20% vs 2024 and +44% vs 2019.
- These changes were driven by the evolution of unit rates and of traffic characterized by the volumes (+4.8% in January 2025 vs January 2024), the average distance flown (+1.8%) and the average weight of each aircraft (-0.1%).
- The January 2025 variation (+20% vs January 2024) is explained by an increase in Unit Rates (+10.6%) and an increase in total en-route Service Units (+7%).

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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