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EUROPEAN AVIATION OVERVIEW

03-09 Mar 2025

Wednesday 12 March 2025

Headlines

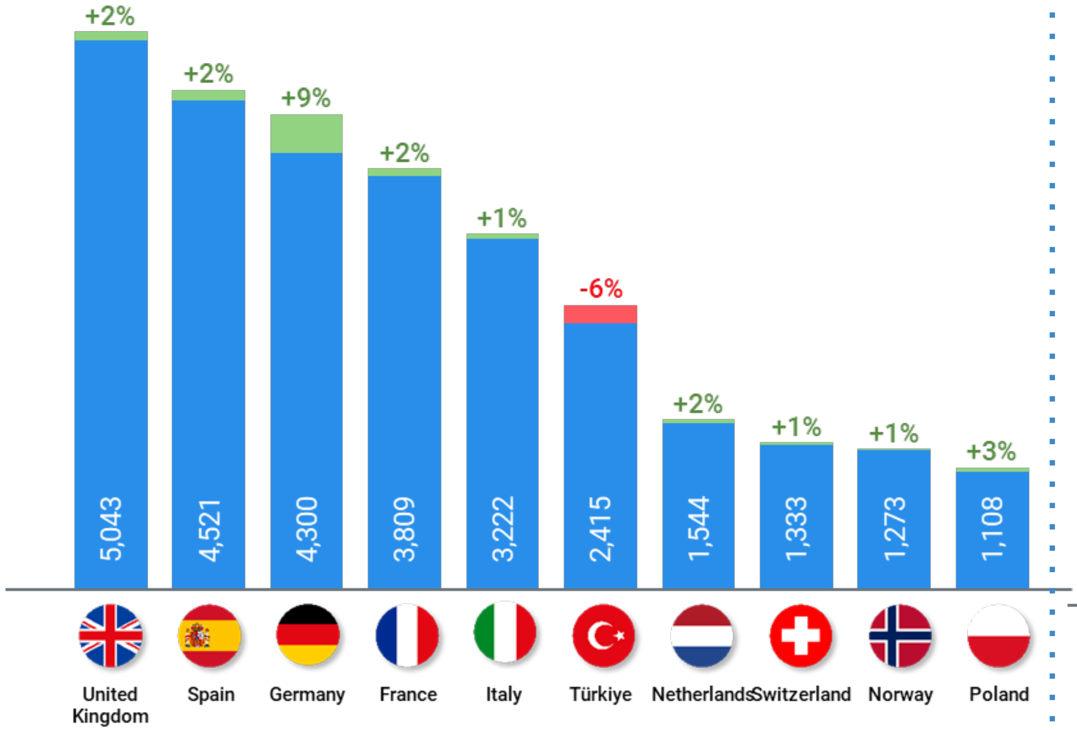
(Week 03-09 Mar 2025)

- The network recorded 26,476 average daily flights (+6% vs 2024).
- Aggregate traffic was 2.0% higher week-on-week across the top 10 States, with all States within this group (except Türkiye) recording higher numbers of flights.
- Year-to-date traffic is 96% of 2019, 5% more than 2024.
- En-route ATFM delays were slightly higher than in the previous week (4%), with a daily average of just below 11,000 minutes. They were 12% higher than in 2024 and represent, on average, 0.41 min/flight.
- 'ATC capacity/staffing' was the top delay cause last week (72% of all en-route ATFM delays), followed by 'Weather' (16%).
- The average jet fuel price was at 2.12 USD/gallon on 07 March, a 6% decrease on two weeks earlier.
- Air ticket prices (in real terms) in January 2025 were 3.6% lower than in January 2024
- ACI reports that, in 2024, European airports welcomed 2.5 billion passengers in 2024, a +7.4% increase on 2023 and a +1.8% increase compared to 2019 levels.
- For 2024, all but one of the top 10 biggest European airlines/airline groups posted positive operating results. Half of them managed to improve their operating profits (reduce their losses) compared to 2023. In our sample, the aggregated operating results for 2024 were slightly below the 2023 ones.

Top 10 busiest States

On week 03-09 Mar 2025

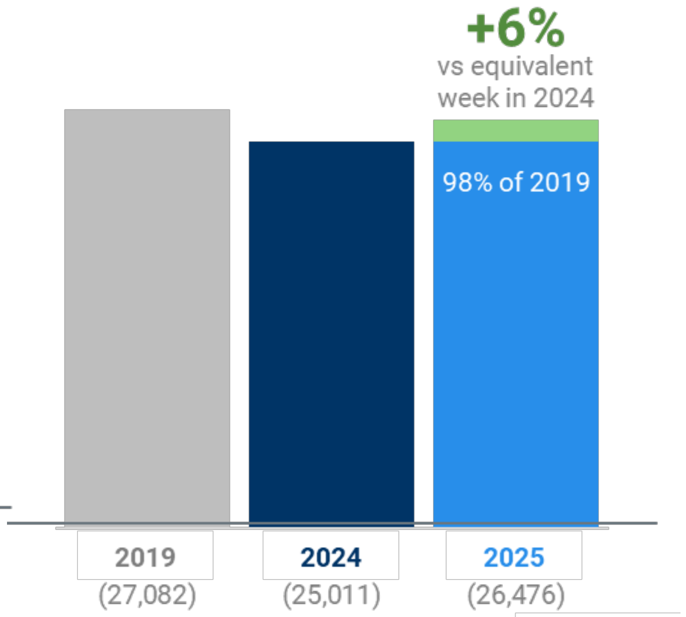
(all flights excl. overflights compared with previous week)



Traffic situation

Average daily flights (including overflights)

Week 03-09 Mar 2025

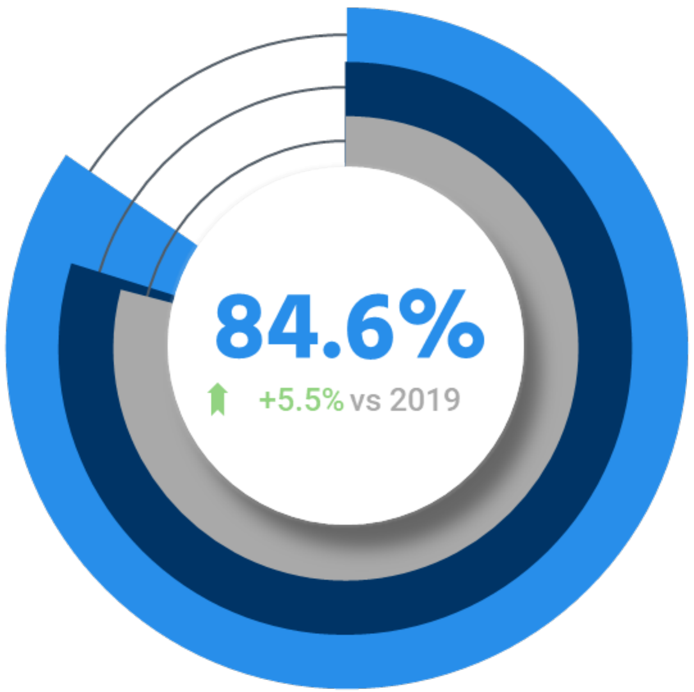


Arrival & departure punctuality

(all network scheduled flights)

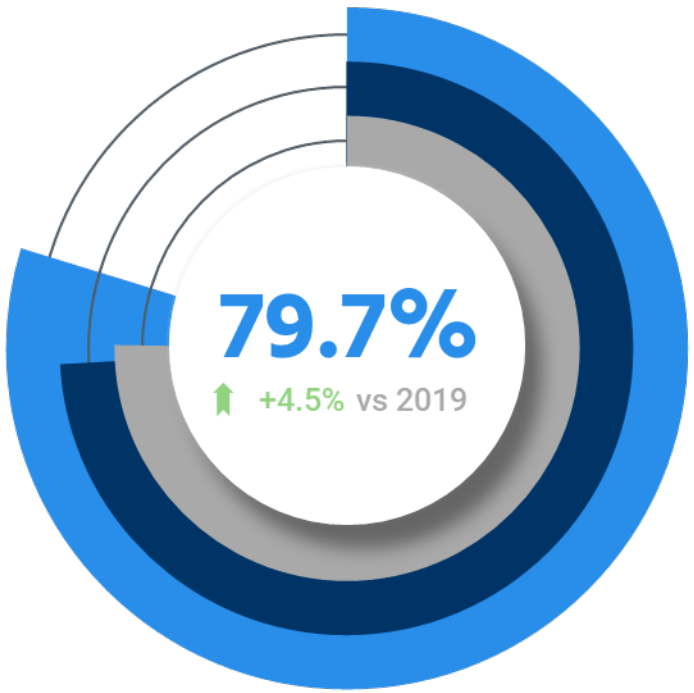
Week 03-09 Mar 2025

ARRIVAL PUNCTUALITY



79.1% in 2019
79.8% in 2024

DEPARTURE PUNCTUALITY



75.2% in 2019
74.1% in 2024

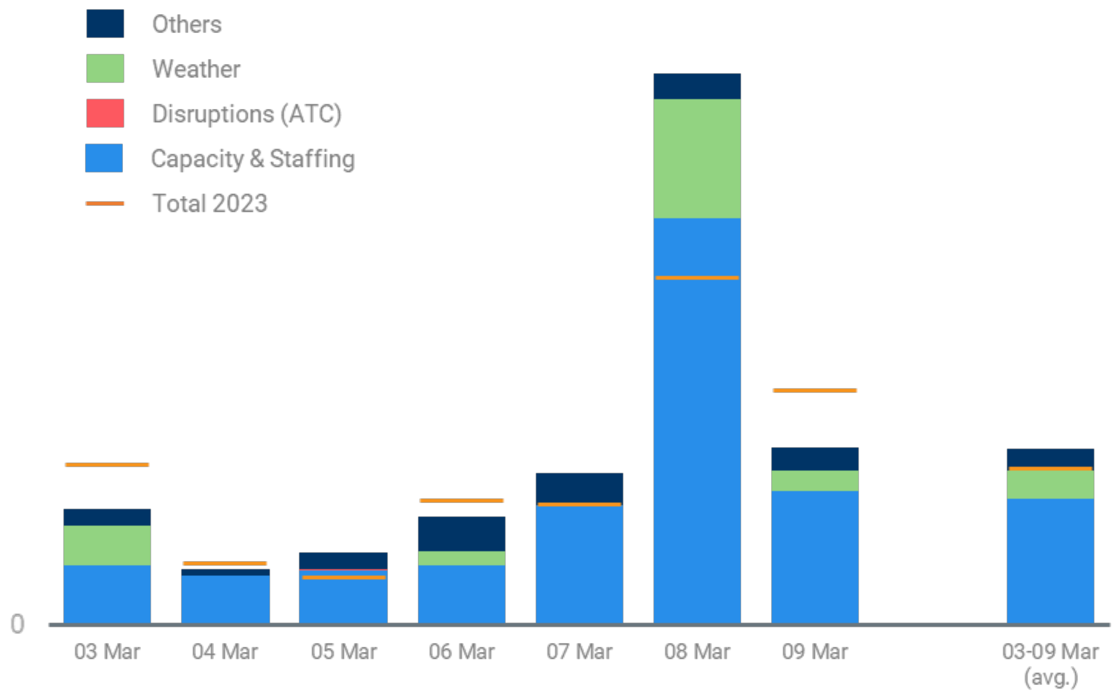
The pictures show the share of flights arriving/departing no later than 15 minutes after/before the scheduled time (OTP15).

- Network punctuality improved when compared to the equivalent week in 2024. Arrival punctuality increased by 4.8 percentage points to 84.6%, with departure punctuality increasing by 5.6 percentage points to 79.7%; compared to the same week in 2019, both arrival and departure punctuality are better (resp +5.5pp and +4.5pp).
- Lisbon was affected by weather (mainly CBs and high winds) throughout the week, due to a low-pressure weather system influencing Portugal and Spain. The airport also saw high delays on 09 March due to unplanned runway works and ATC equipment causes.
- Amsterdam Schiphol experienced delays due to weather (low visibility) as well as aerodrome capacity. Low Visibility Procedures impacted London Gatwick on 03, 04, 05 and 06 March, with ATC staffing causes also recorded on 09 March.
- Nice saw delays due to weather; however, this was mainly driven by one day (10 March).
- Finally, Athens saw daily regulations for ATC capacity.

En-route ATFM delays

Delays per cause (EUROCONTROL Area)

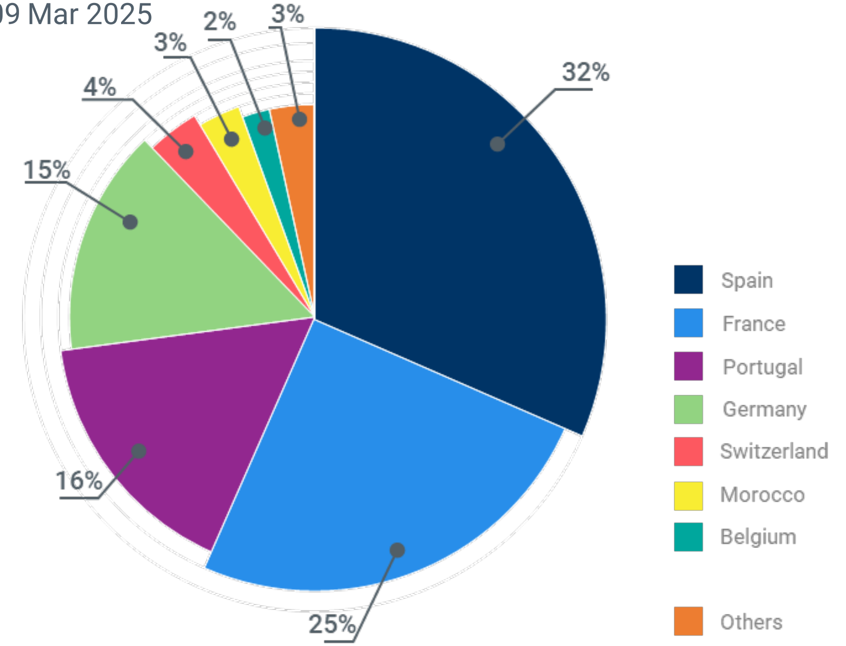
In minutes (total daily and 7-day average) in 2025



- Week 10 (03 – 09 Mar) registered higher en-route ATFM delays than Week 9 (+4%), with an average of 10,882 daily minutes – 12% higher than for the same operational week of 2024.
- ATC capacity/staffing was responsible for 72% of all en-route ATFM delays, especially in Portugal and Spain. "Weather" cause, accounting for 16%, was explained by a low pressure system 'Jana' loitering to the west-north-west of the Iberian Peninsula hence generating convective weather cells across Portugal, Spain and southern France.
- Total ATFM delay was just below 0.9 min/flight in Week 10, made up of 0.41 min/flight en-route delay and 0.47 min/flight airport. Total ATFM delay was 9% higher than in Week 9.

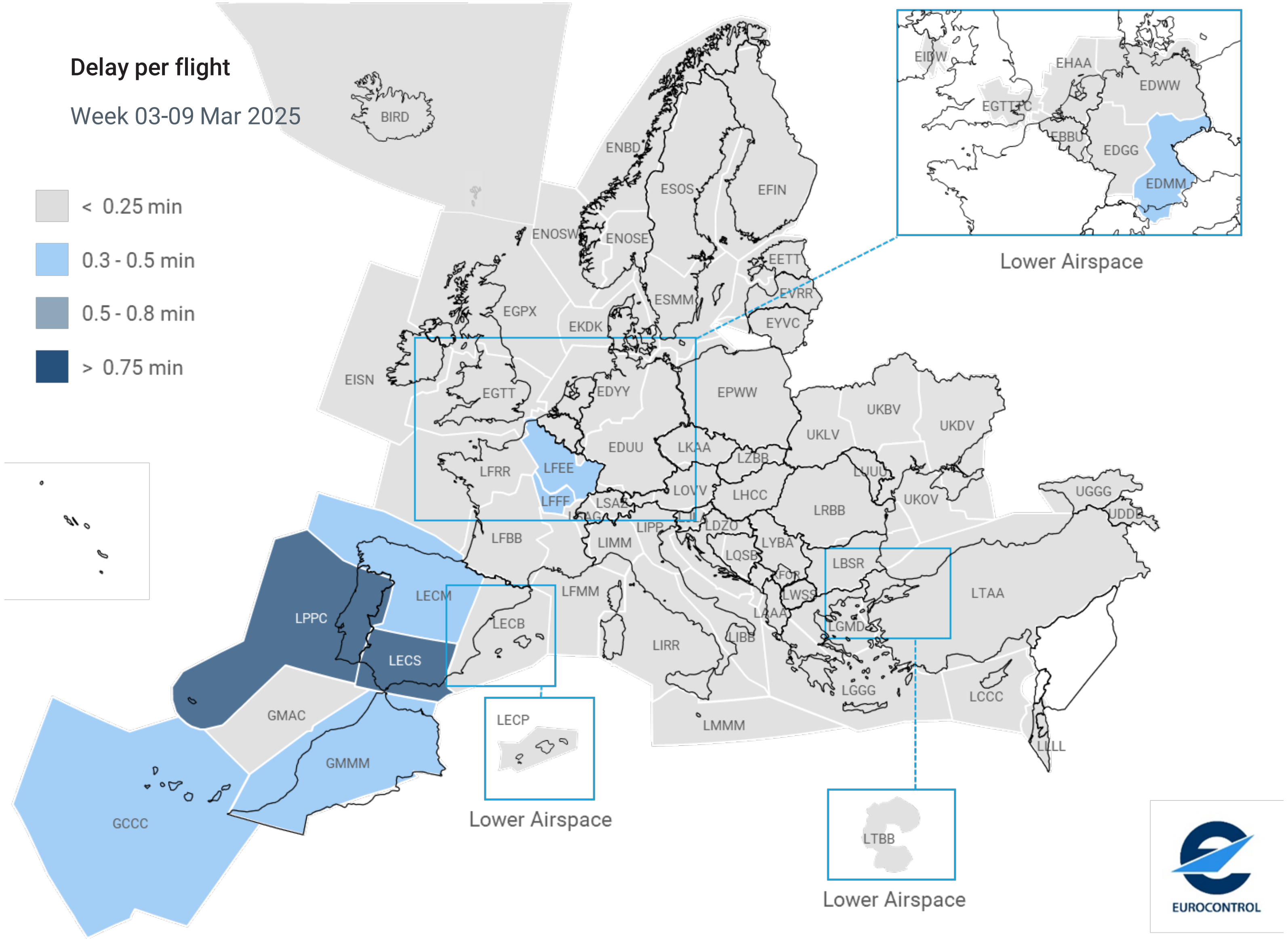
Share of en-route ATFM delays

Week 03-09 Mar 2025



- Spain accounted for 32% of all en-route ATFM delays, mainly at Seville ACC (11.4pp with 7.3pp due to "Weather" and 4.1pp for "Capacity/Staffing" issues), Madrid ACC (10.6pp with 8.1pp "Capacity/Staffing" and 2.5pp "Weather") and Barcelona ACC (5.3 pp).
- France accounted for 25% of all en-route ATFM delays, mainly at Reims ACC (10.1pp with 6.1pp "Capacity/staffing" and 4pp "Other"), Paris ACC (7pp, almost all related to 4Flight implementation) and Brest ACC (3.5pp).
- Portugal accounted for 16% of all en-route ATFM delays with Lisbon ACC (13.3pp "Capacity/Staffing" and 3pp "Weather").
- Germany accounted for 15% of all en-route ATFM delays with "Capacity/Staffing" issues at Munich ACC (6.6pp), Langen ACC (5.1pp) and Karlsruhe UAC (3.2pp).

En-route ATFM delayed flights per Area Control Centre



- In Week 10 (03 - 09 March), no ACCs recorded en-route ATFM delays higher than 1.0 min/flight.
- Lisbon ACC recorded 0.93 min/flight as it was affected by convective weather which disturbed the usual traffic patterns and complicated traffic management, prompting “Capacity” and “Weather” delays, aggravated on Saturday by an ATC Staffing issue limiting sector availability.
- Seville ACC recorded 0.87 min/flight as it was particularly disturbed by the weather situation on Saturday, with significant overflight traffic to/from the Canary Islands.
- Reims ACC recorded 0.42 min/flight as sector availability was notably limited on Sunday due to a recurring ATC Staffing issue.
- Casablanca ACC recorded 0.37 min/flight as it experienced capacity delays, with overall traffic 36% above 2019 levels.

Top 10 States

Departures and arrivals

Week 03-09 Mar 2025

See more

No.	Country	Average daily flights	% prev week	% prev year	% 2019
1.	United Kingdom	5,043	+2%	+4%	-5%
2.	Spain	4,521	+2%	+10%	+17%
3.	Germany	4,300	+9%	+12%	-16%
4.	France	3,809	+2%	+5%	-1%
5.	Italy	3,222	+1%	+10%	+7%
6.	Türkiye	2,415	-6%	-1%	+8%
7.	Netherlands	1,544	+2%	-0%	-1%
8.	Switzerland	1,333	+1%	+6%	-1%
9.	Norway	1,273	+1%	-1%	-9%
10.	Poland	1,108	+3%	+13%	+13%

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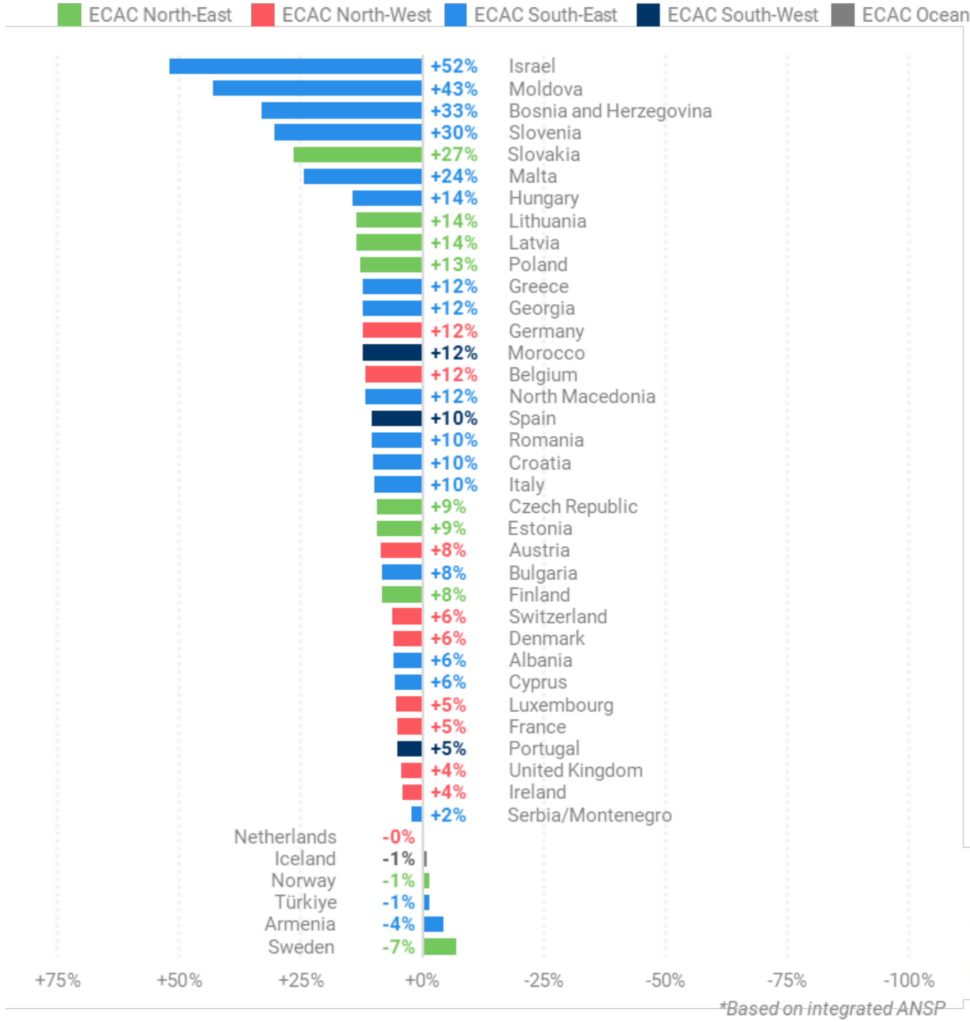
- The top 10 States, in aggregate, recorded 2.0% more flights than in the previous week.
- Germany recorded the greatest increase (+9%), mainly on Lufthansa domestic flows; this was principally due to a recovery from a ground staff strike at German airports in the previous week.
- Türkiye recorded a decline (-6%), mainly on Turkish Airlines and Pegasus flights and on domestic flows as well as on flows with Saudi Arabia.
- Four States in the top 10 are recording traffic above 2019 levels (Spain, Poland, Türkiye and Italy), with the remainder between 1% and 16% below pre-COVID levels.
- Traffic to/from Israel is up +52% vs the same week in March 2024, reflecting the impact then of the conflict with Hamas.

States in the EUROCONTROL Network

Compared to the equivalent week in 2024

Dep/Arr flights for week 03-09 Mar 2025



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Top 10 aircraft operators

Week 03-09 Mar 2025 (avg daily flights)

See more

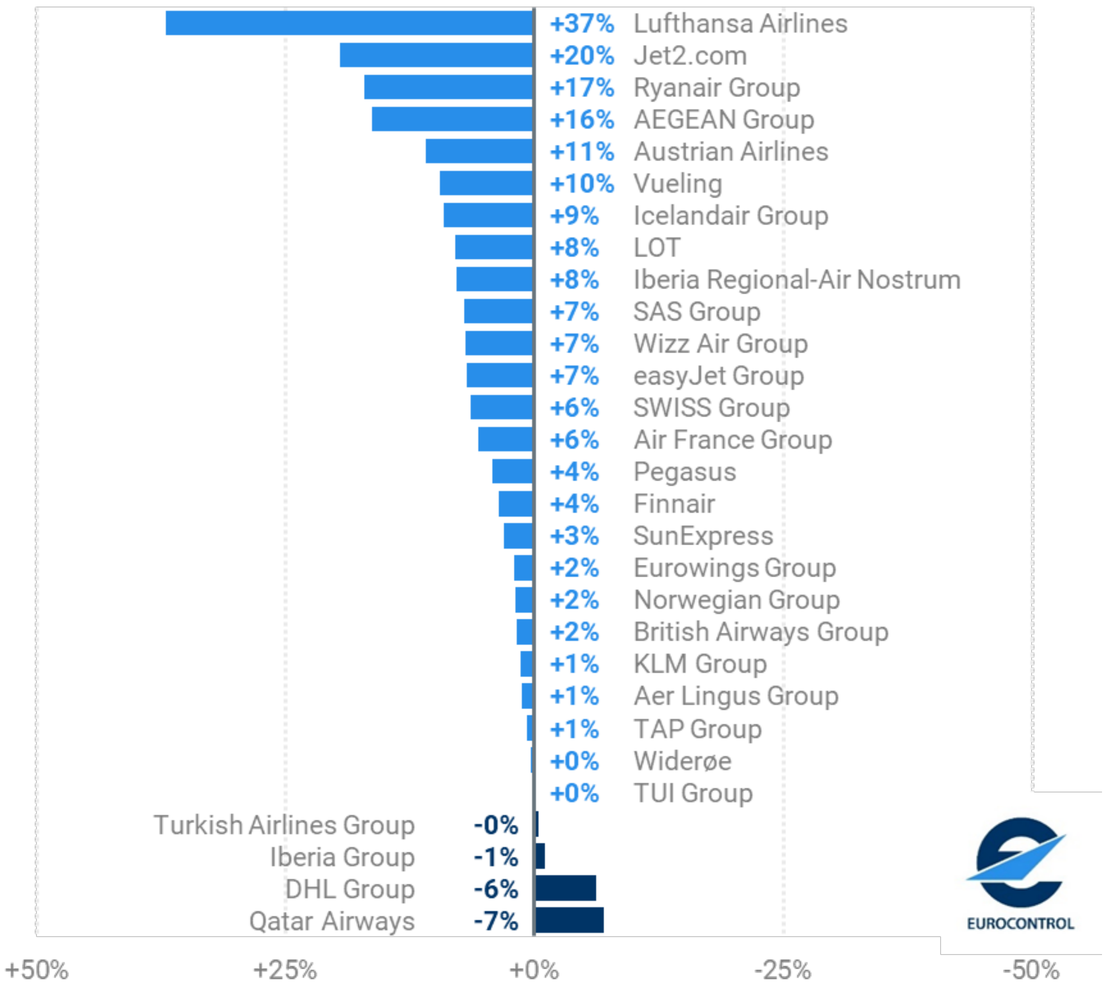
No.	Aircraft operator	Average daily flights	% prev week	% prev year	% 2019
1.	Ryanair Group	2,702	+7%	+17%	+40%
2.	easyJet Group	1,462	+0%	+7%	-5%
3.	Turkish Airlines Group	1,321	-5%	-0%	+3%
4.	Lufthansa Airlines	1,076	+15%	+37%	-28%
5.	Air France Group	950	+0%	+6%	-18%
6.	British Airways Group	832	+3%	+2%	-8%
7.	KLM Group	831	-0%	+1%	+6%
8.	Wizz Air Group	782	-1%	+7%	+67%
9.	SAS Group	660	+8%	+7%	-24%
10.	Vueling	574	-1%	+10%	+16%

- The top 10 aircraft operators, in aggregate, recorded 2.9% more flights than in the previous week.
- Six of the top 10 aircraft operators recorded more flights than during the previous week.
- Lufthansa increased by far the most (+15%, see previous slide) mainly on domestic flows in Germany, followed by SAS Group (+8%, mainly on domestic flows in Norway) and Ryanair Group (+7%, mainly on Spain ↔ UK and Germany ↔ Spain).
- Turkish Airlines decreased by 5% (with declines on domestic flows as well as on flows Saudi Arabia ↔ Türkiye).
- Compared with 2024, all the main airlines/airline groups except Turkish Airlines recorded more flights – with five of the top 10 carriers/groups (Wizz Air, Ryanair, Vueling, KLM Group and Turkish Airlines) flying more than in 2019.

Aircraft operators in the EUROCONTROL Network

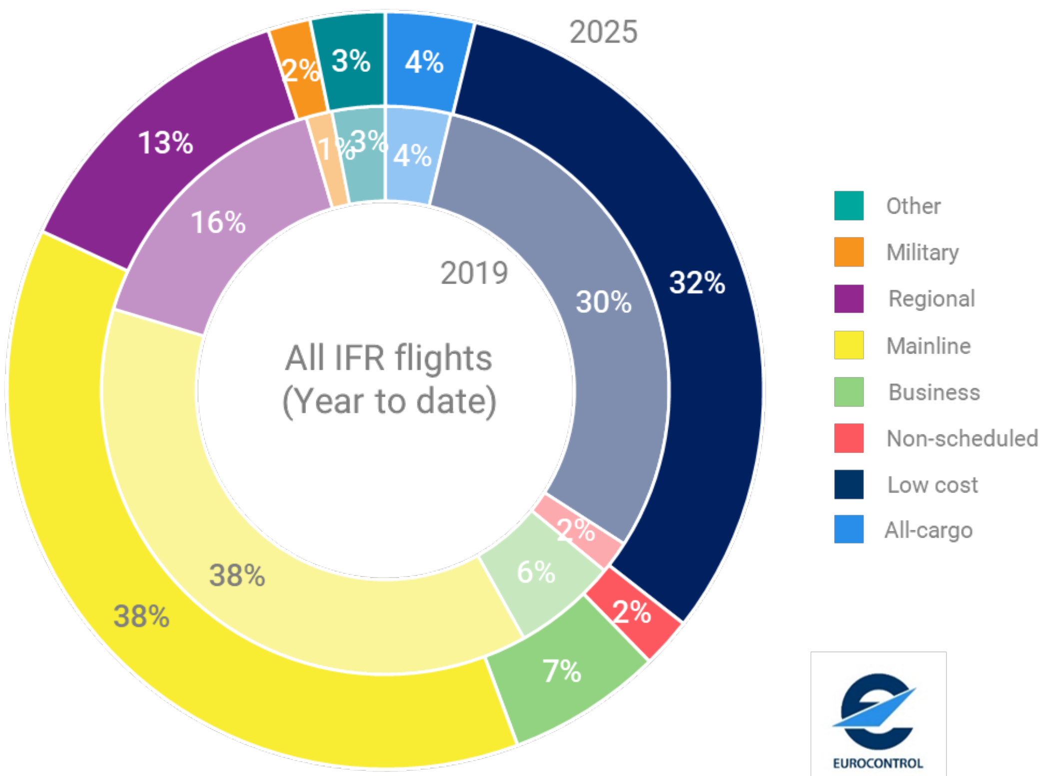
Compared to the equivalent week in 2024

Dep/Arr flights for week 03-09 Mar 2025



Market segments in the EUROCONTROL Network

Average share of total flights (year to date)

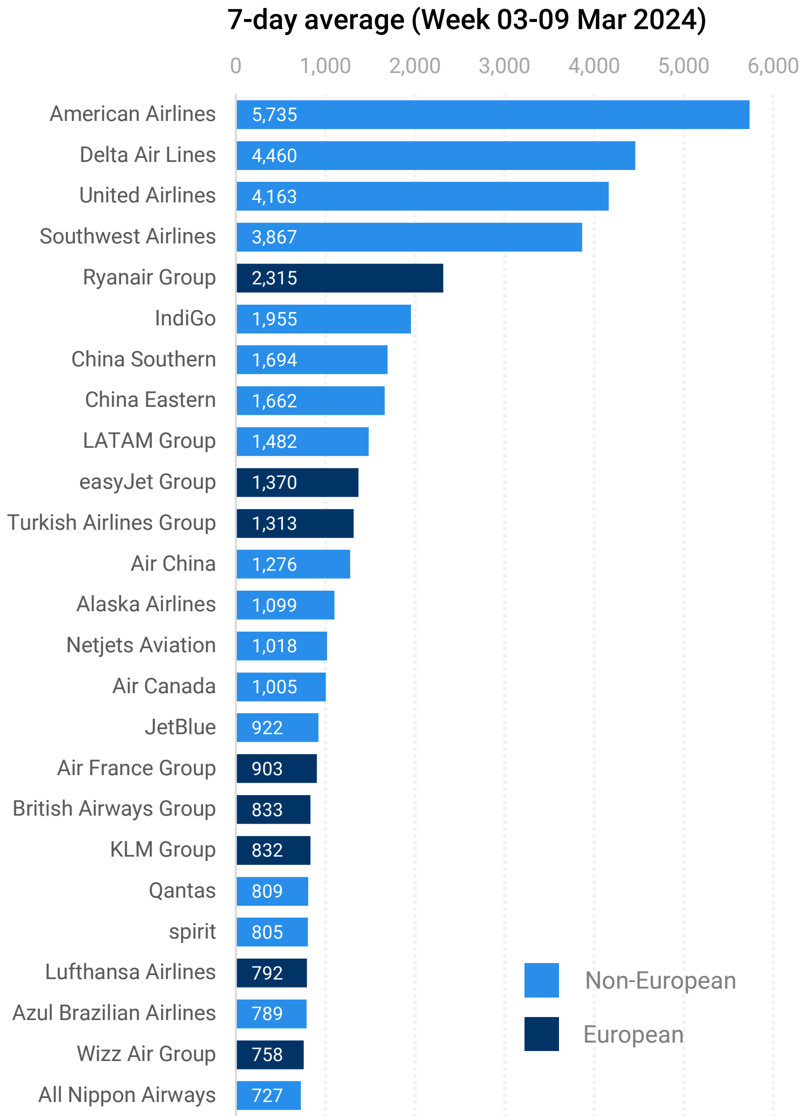


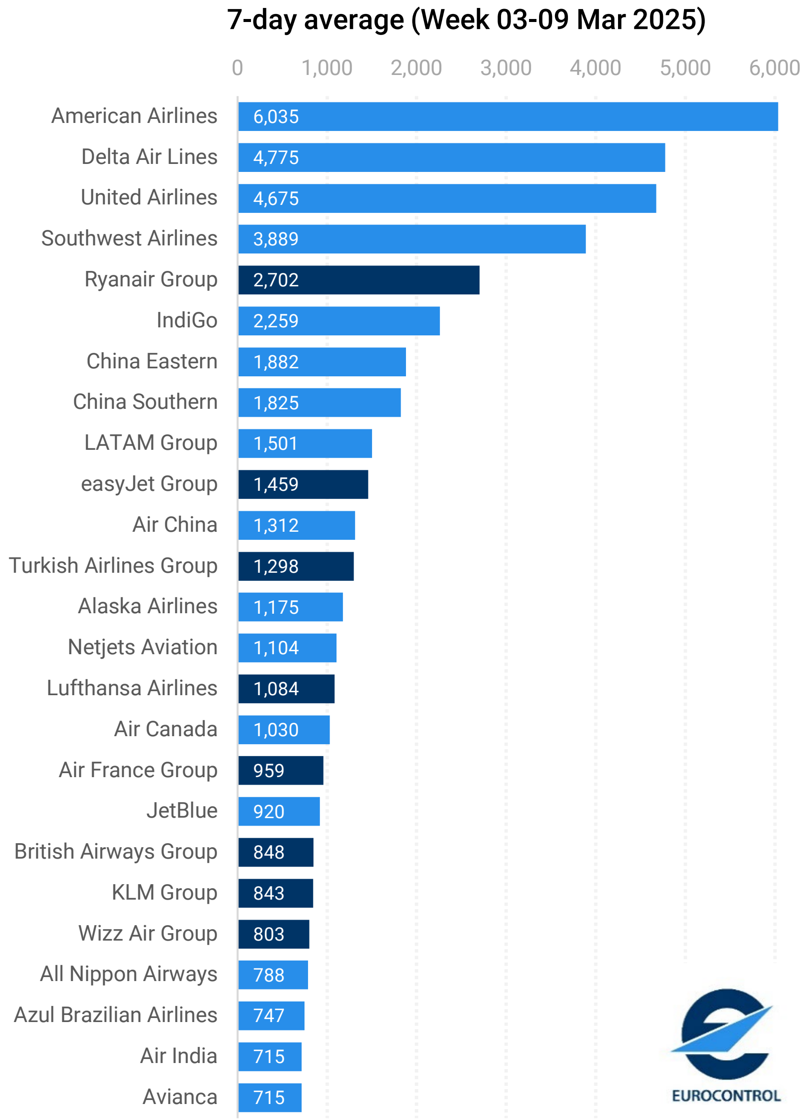
No.	Market segment	Avg. flights	% prev week	% prev year	% 2019
1.	Mainline	9,642	+2%	+6%	-5%
2.	Low Cost	8,604	+2%	+11%	+8%
3.	Regional	3,478	+3%	+2%	-13%
4.	Business	1,727	-2%	-7%	+22%
5.	Other	1,002	+18%	+8%	+74%
6.	All-cargo	996	+1%	+1%	+13%
7.	Non-Scheduled	548	-8%	+4%	+2%
8.	Military	482	-4%	+7%	+9%

- 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 Mainline (+2%), Low cost (+2%) and Regional (+3%), and a small decline for Non-scheduled (-8%, mainly owing to the decline on Turkish carriers: Freebird, Southwind and Pegasus). Business aviation slightly contracted compared to previous week.
- All but two market segments recorded flights above 2019 levels: Business Aviation (+22%), All-cargo (+13%), Low cost (+8%) and Non-scheduled (+2%). Mainline and Regional, however, were below their 2019 levels at -5% and -13% 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 (12th), Lufthansa Airlines (15th), Air France Group (17th), British Airways Group (19th), KLM Group (20th) and Wizz Air Group (21st).

Top 10 airports

Airport ranking

Week 03-09 Mar 2025

See more

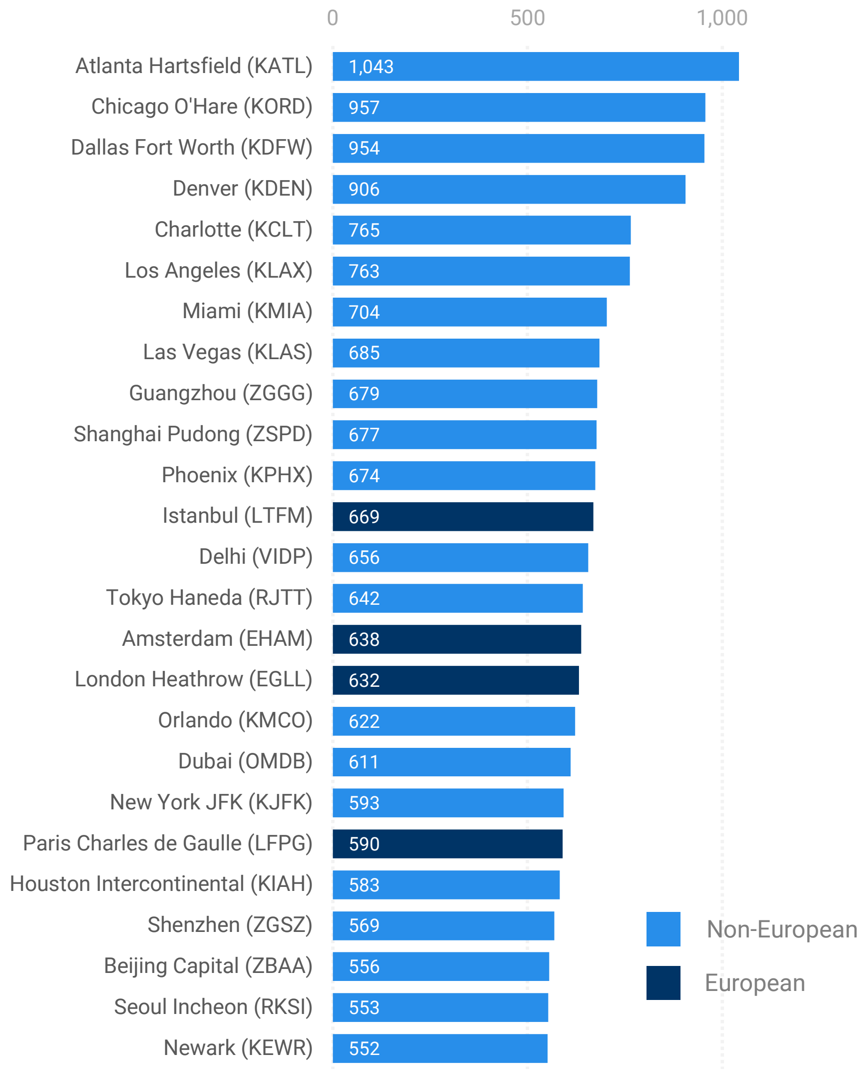
No.	Airport	Avg. daily dep/arr flights	% prev week	% prev year	% 2019
1.	London Heathrow	1,296	+1%	+2%	+0%
2.	Istanbul	1,296	-5%	-3%	n/a
3.	Amsterdam	1,295	+1%	+2%	-2%
4.	Paris Charles de Gaulle	1,242	+1%	+5%	-4%
5.	Frankfurt	1,157	+2%	+26%	-14%
6.	Madrid Barajas	1,140	+1%	+4%	+3%
7.	Barcelona	919	+1%	+9%	+10%
8.	Munich	805	+35%	+20%	-27%
9.	Rome Fiumicino	790	+1%	+10%	+3%
10.	Zurich	663	+1%	+6%	-4%

- Compared with the last edition, there were some changes in the top 10: Amsterdam Schiphol dropped to third place, just behind London Heathrow and Istanbul. Frankfurt and Madrid Barajas swapped places and London Gatwick has disappeared from the table, with the 10th busiest airport slot now occupied by Zurich.
- London Heathrow (1,296 flights per day, +1% vs the previous week) and Istanbul (1,296, -5%) are the busiest airports, followed by Amsterdam Schiphol (1,295, +1%) and Paris CDG (1,242, +1%).
- All of Week 10's top airports (except Istanbul) recorded more flights than in the same week in 2024, with the highest growth at Frankfurt and Munich (+26% and +20%, artificially inflated by a rebound from a ground staff strike during week 10 in 2024).
- Only 3 top 10 airports (Barcelona, Madrid and Rome) are currently handling traffic above their 2019 levels (Here, Istanbul is excluded as it only went into full operations in April 2019).

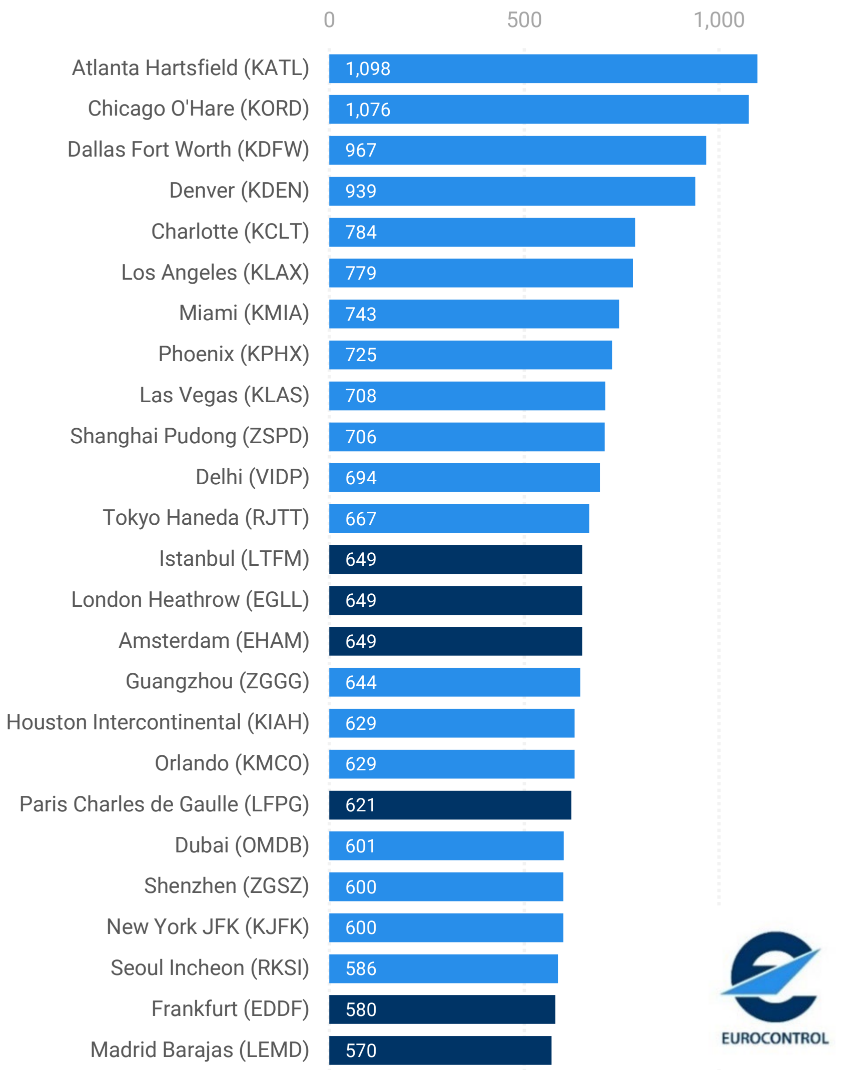
Top 25 global airport departures

(average daily departure flights)

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



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



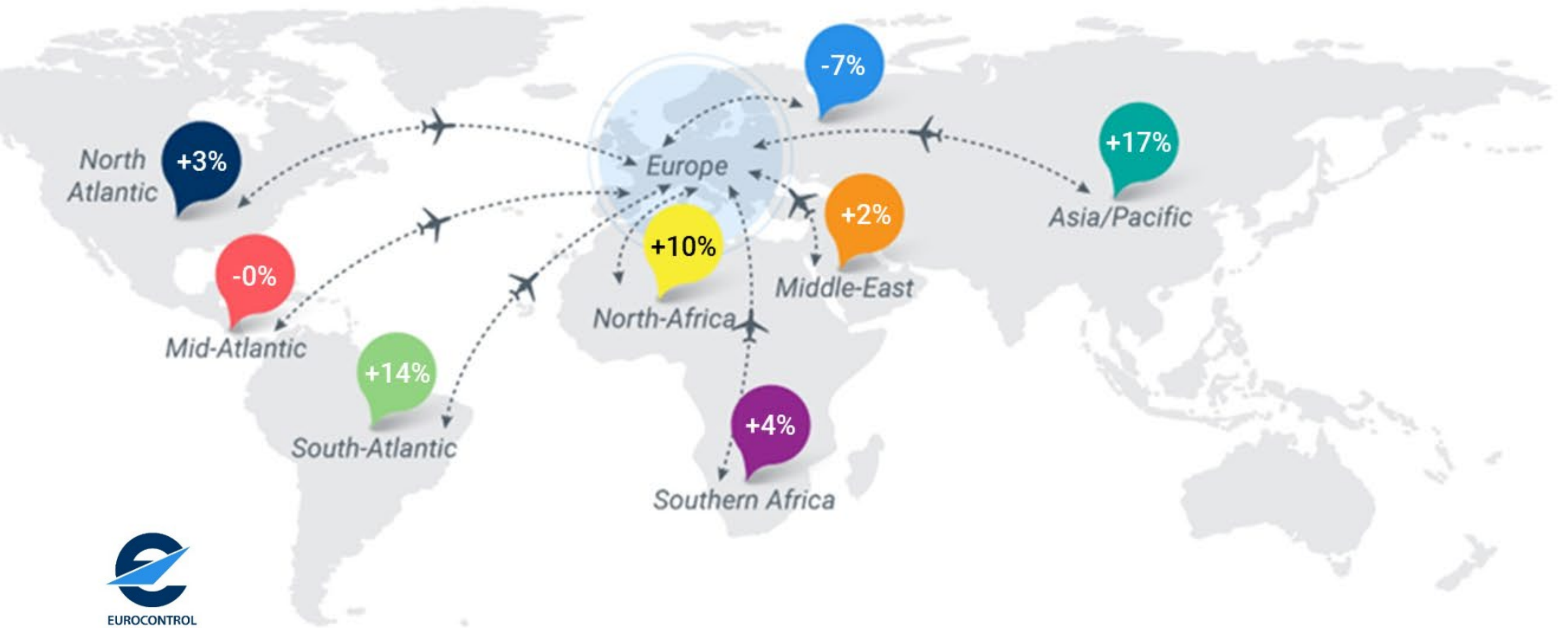
Source: Flightradar24 Historical Global Utilisation data

- Over the last week, six European airports made the top 25 in terms of global airport departures (two more than in the corresponding week in 2024).
- There are three European airports in the top 15: equally placed (same number of flights, ranked 13th): Istanbul, London Heathrow and Amsterdam Schiphol. The latter two airports have moved up in the ranking compared to the same week last year.
- The other European airports in the top 25 are Paris CDG (19th), Frankfurt (24th) and Madrid (25th).
- Due to the strike disruption in Germany in 2024 (ground strike), Frankfurt was not part of the top 25.
- The top 10 global airport ranking is dominated by US airports, with the exception being Shanghai Pudong airport (10th).

Traffic flows

(average daily departure/arrival flights for week 03-09 Mar 2025)

Region	Average daily flights	% prev week	% prev year	% 2019
Intra-Europe	20,265	+3%	+6%	-3%
Europe ↔ Middle-East	1,292	-7%	+2%	-1%
Europe ↔ North-Africa	1,191	-6%	+10%	+26%
Europe ↔ North Atlantic	1,084	+6%	+3%	+11%
Europe ↔ Asia/Pacific	882	+1%	+17%	+13%
Europe ↔ Southern Africa	321	-2%	+4%	+1%
Europe ↔ Other Europe	220	+1%	-7%	-72%
Europe ↔ South-Atlantic	204	+0%	+14%	+14%
Europe ↔ Mid-Atlantic	196	-4%	-0%	+5%
Non Intra-Europe	5,390	-2%	+6%	-2%



- The main intra-European traffic flow recorded 20,265 daily flights last week, 3% higher than the previous week. Intercontinental flows amounted to 5,390 daily flights on average, 2% lower than the previous week.
- The second-largest flow is with the Middle East, with 1,292 flights per day (-7% compared with the previous week owing to decreases in the Saudi Arabia ↔ Türkiye flow). The flow is recording traffic 10% above the same week in 2024 and -1% vs 2019 levels.
- The third-largest flow is with North Africa, with 1,191 average daily flights (-6% compared with the previous week, owing mainly to decreases on the France ↔ Algeria, France ↔ Morocco and the France ↔ Tunisia flows, potentially related with the start of the Ramadan).
- The fourth-largest flow is with North America, with 1,084 daily flights (+6%, owing to increases on flows between the US and Germany, France and Ireland).
- The flow between Europe and the Asia/Pacific region (882 flights per day, +1% owing to increase on Germany ↔ China) shows traffic +17% vs the same week in 2024, and +13% compared with 2019 levels.
- The flow to ‘Other Europe’ (including the Russian Federation) remains massively reduced at -72% compared with 2019.

Top 10 long-haul country pairs

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

Week 03-09 Mar 2025

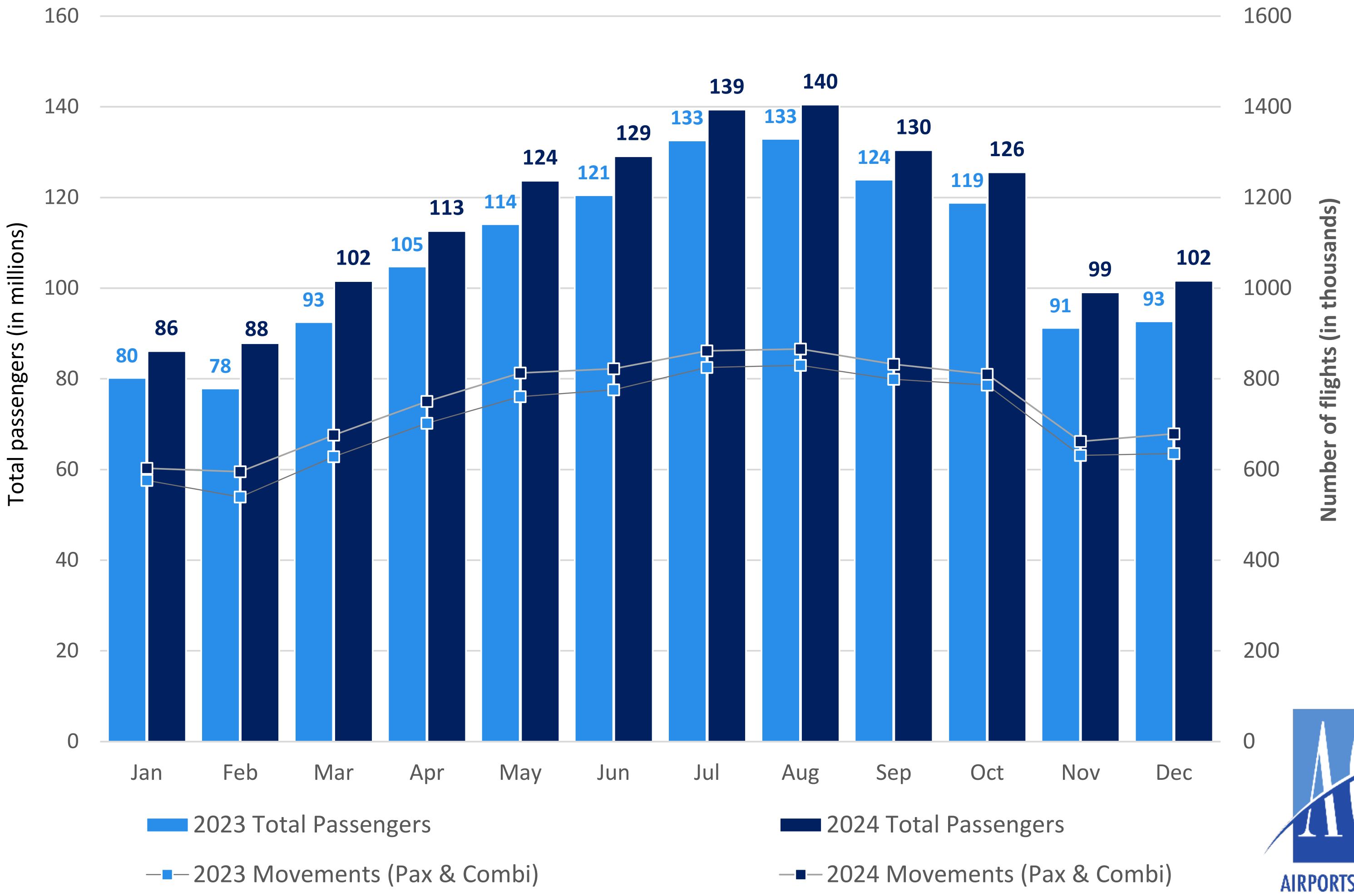
No.	Country pair	Average daily flights	% prev week	% prev year	% 2019
1.	UK ↔ US	261	+0%	-2%	-3%
2.	Germany ↔ US	141	+14%	+15%	-3%
3.	France ↔ US	105	+6%	+5%	+10%
4.	Netherlands ↔ US	67	+4%	-6%	+3%
5.	UAE ↔ UK	64	-5%	+5%	+2%
6.	Spain ↔ US	55	+1%	+4%	+15%
7.	Ireland ↔ US	52	+12%	+3%	+17%
8.	Russia ↔ UAE	51	+2%	+13%	+1532%
9.	India ↔ UK	49	-1%	+11%	+25%
10.	Germany ↔ UAE	44	+1%	+10%	-3%

- 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, Russia ↔ UAE, India ↔ UK and Germany ↔ UAE.
- All but two long-haul flows posted increases on the previous week with main increases on Germany ↔ US and Ireland ↔ US. Decreases were recorded on flows with the UK: UAE ↔ UK (-5%) and India ↔ UK (-1%).
- All but two of the top long-haul flows recorded more traffic vs 2024 with double-digit increases on four of them: Germany ↔ US, Russia ↔ UAE, India ↔ UK and Germany ↔ UAE.
- Seven flows are currently above 2019 levels, notably Russia ↔ UAE, India ↔ UK (+25%) and Ireland ↔ US (+17%).

Top 40 European airports: passengers

2024

Passengers and flights at ECAC top 40 Airports



Europe's airport network as a whole has now exceeded pre-pandemic traffic levels: Europe*'s airports welcomed **2.5 billion passengers**** in 2024, a **+7.4% increase** on **2023** and a **+1.8% increase** compared to **2019** levels.

Based on ACI Europe **passenger** data, and for the **top 40 European airports**:

- The **number** of **passengers**** was **1.38 billion in 2024**, **+7%** more than in **2023**, while the number of corresponding flights amounted to 8.97 million, a +5.7% increase on 2023. The respective **recovery** rates **on 2019** levels were **101%** in **passenger numbers** and 95% for flight movements.
- **In 2024, certain aircraft operators** were operating **above** their **2019 levels** in terms of **seats**, mainly thanks to new aircraft models (e.g. neo).
- During the first quarter of 2024, the number of passengers at the top 40 airports was already nearing the 2019 levels (Jan: +97%, Feb to Apr +99%). The monthly growth rate progressively levelled off from May onwards, above 100%, and averaged 103% over the period October-December.

*: Europe for ACI covers 55 States, ACI EUROPE has recently expanded their monthly coverage to include over 450 airports, representing over 95% of European airport traffic.

**: Passengers comprise International enplaned + deplaned, Domestic enplaned +deplaned, as well as Transit passengers (counted once).

Economics

Week 03-09 Mar 2025

07 Mar 2025
avg fuel price:

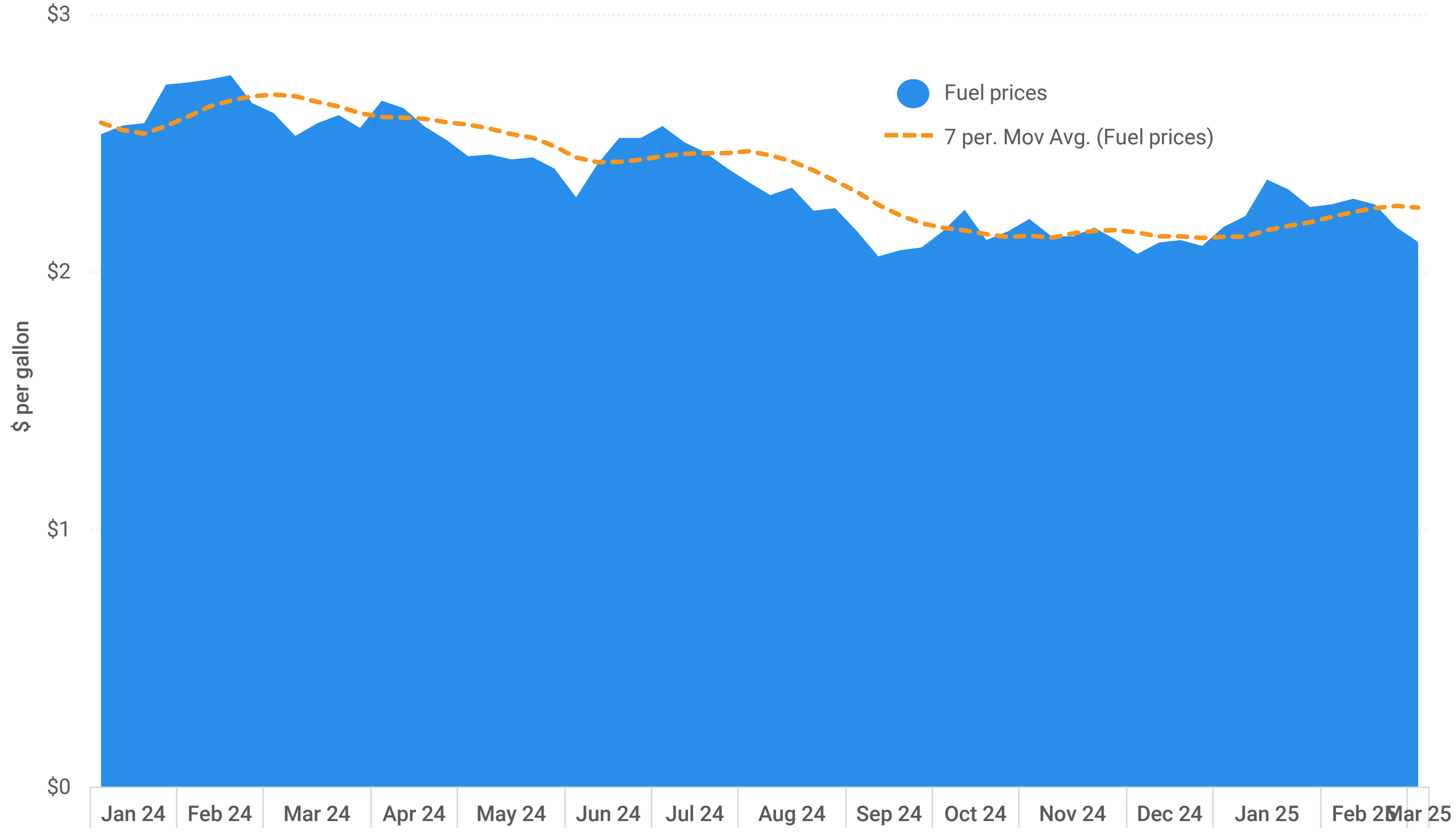
$2.12 /gallon

-6%

vs. $2.26 /gallon
on 21 Feb 2025

Source: IATA/Platts

Jet fuel price (Europe)

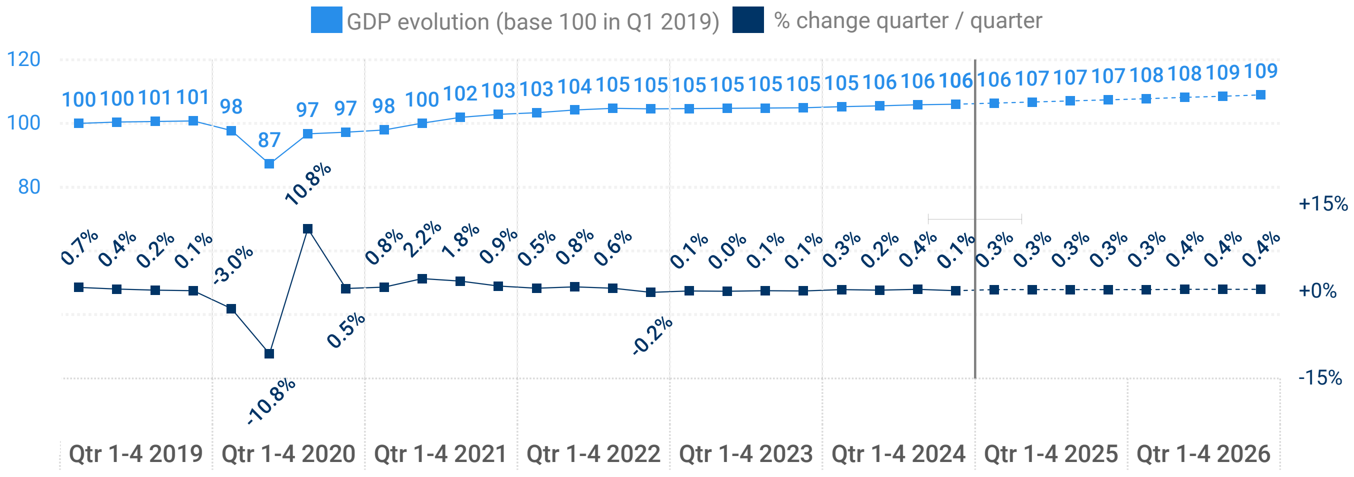


Source: IATA/Platts

- The average price of jet fuel closed at 2.12 USD/gallon on 07 March 2025, 6% lower 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-February 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.

GDP in the European Union

Constant prices and exchange rate, Euro



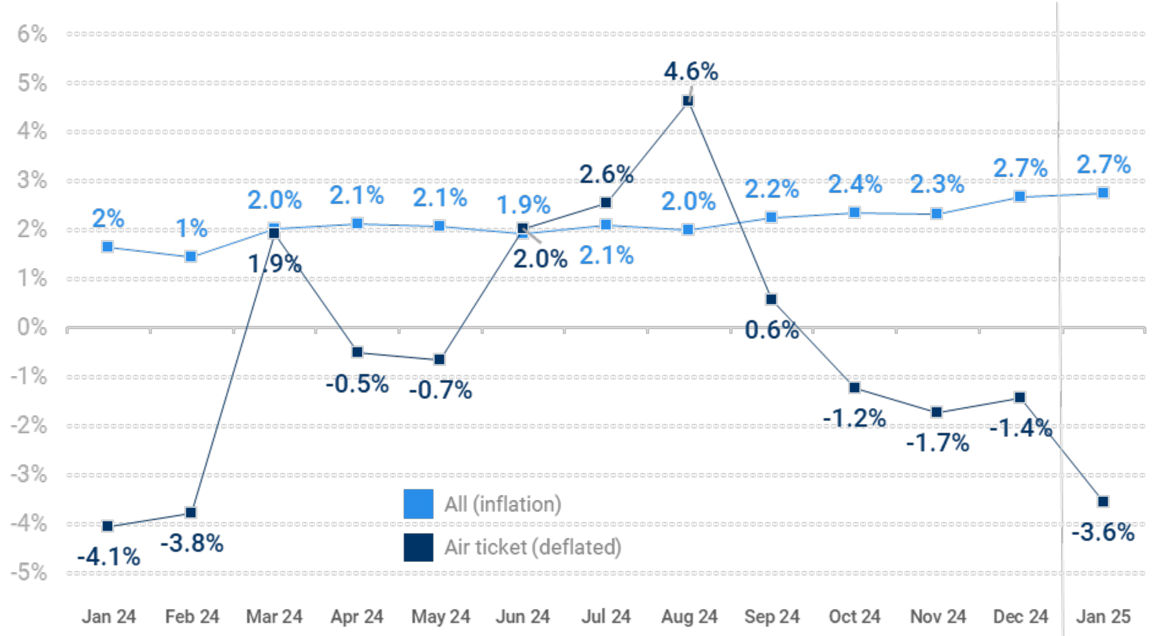
Source: Oxford Economics Ltd.
Last Update: Feb. 2025

According to the **latest GDP forecast from Oxford Economics**, the EU27 economies posted a **very weak** but **positive** growth during **Q4 2024** (+0.1% vs Q3 2024). **Overall**, the **EU27** recorded a (preliminary) **+0.85% growth** in **2024** compared to the previous year.

For the **first quarter of 2025**, the growth is expected to reach **+0.3%** (vs previous quarter). The **annual GDP growth** for the **EU27** zone is expected to reach **+1.1% in 2025** and +1.4% in 2026.

Price change per month (EU27)

Values compare to the same month of the previous year



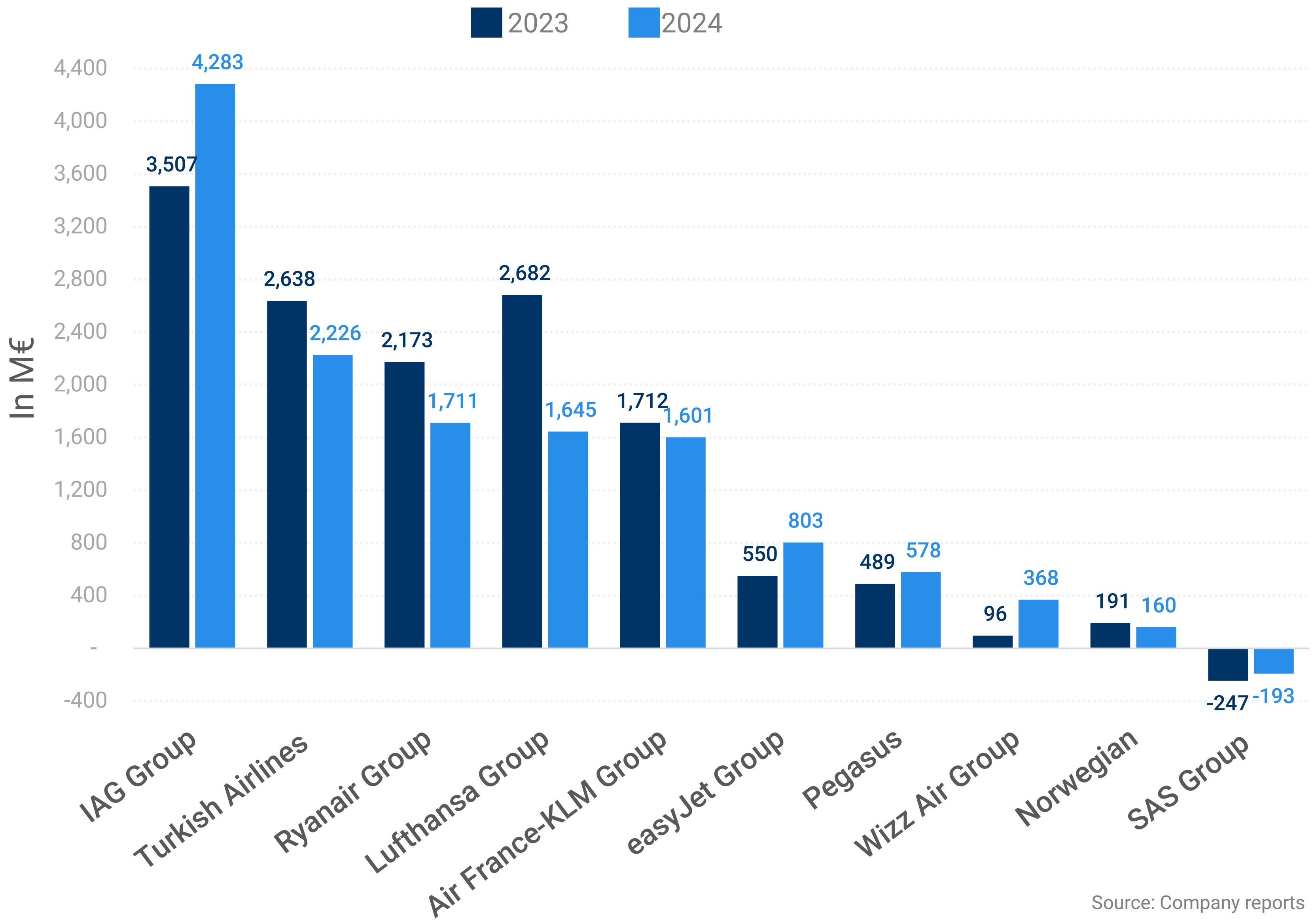
Source: EUROSTAT

The latest information from EUROSTAT for the EU27 shows that:

- **Overall, all-prices** inflation in January **2025** was **2.7% higher than** in January **2024**.
- **Air ticket prices** were **lower (-3.6%), in real terms for January 2025** compared to the same month in 2024.

Operating profits of airlines

In M€ in 2023 and 2024



Source: Company reports

- In this top 10, all airlines/airline groups but one (SAS Group) managed to record profits for 2024.
- Only five airlines/airline groups in this sample managed to improve their profits/reduce their losses on previous year.
- IAG group recorded the highest operating profits (+4,283 M€), driven by on-going investments in the company's transformation efforts across the Group.
- Turkish Airlines recorded 2,226 M€, though posting a 15% decrease on 2023 results, highlighting the difficulties caused by global geopolitical and economic tensions, bottlenecks in aircraft production, and engine issues. That being said, the airline Turkish Airlines' total revenues for 2024 increased by 8.2% year-on-year with passenger revenue increasing by 4% under intensifying competition, while cargo revenue grew by around 35% compared to 2023 confirming Türkiye's strategic position as a global transfer hub.
- Ryanair Group recorded 1,711 M€ in 2024, decreasing its profits by 21% on 2023. Despite delays in aircraft deliveries, Ryanair fleet expanded explaining that operational costs increased for 2024 (vs 2023). Operational costs increased by 8% to €2.93 billion. Fuel hedge savings helping to offset higher staff and operational expenses.
- Airlines considered in this sample recorded 13.8 Bn€ profits for 2024, very slightly below (-4%) 2023 (13.2 Bn€).

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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

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