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EUROPEAN AVIATION OVERVIEW

17-23 Mar 2025

Wednesday 26 March 2025

Headlines

(Week 17-23 Mar 2025)

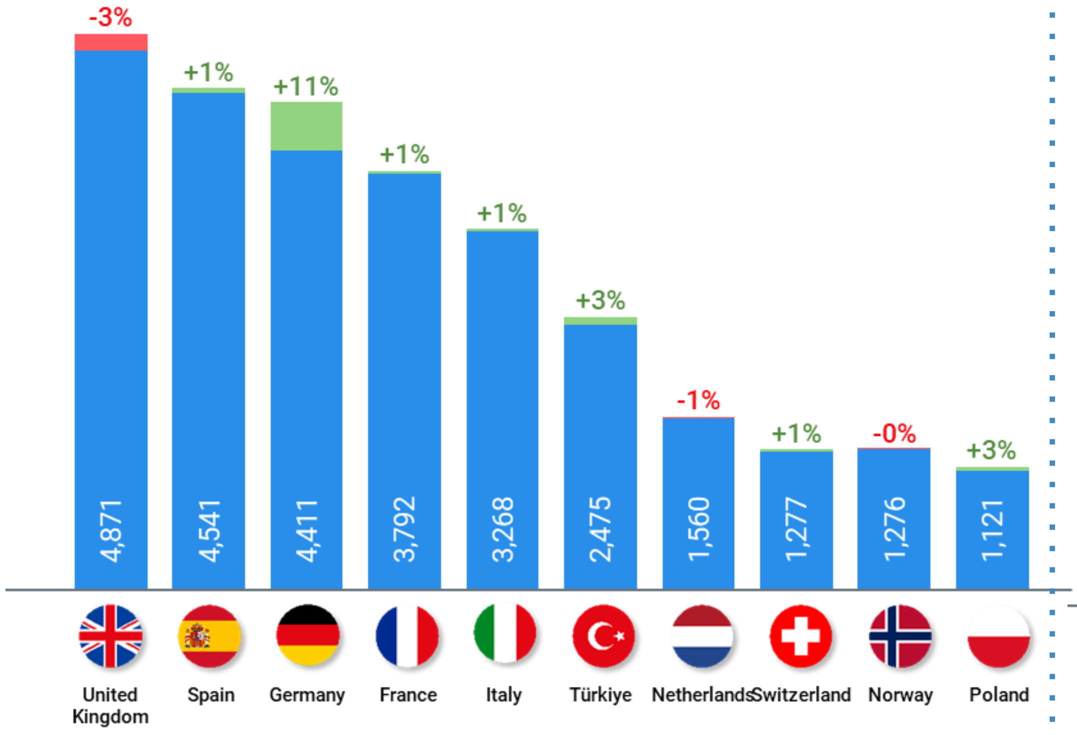
- The network recorded 26,592 average daily flights (+3% vs 2024).
- On average, the top 10 carriers increased their capacities by 1.1% compared to the previous week. Meanwhile, at country level, the top 10 states saw their flights increasing by 1.8%.
- Year-to-date traffic is 96% of 2019, 5% more than 2024.
- The week was marked by the closure of London Heathrow airport on Friday 21 March owing to a major incident (power outage).
- En-route ATFM delays were much higher than in the previous week (+74%), with a daily average of just below 13,400 minutes. They were 20% higher than in 2024 and represent, on average, 0.50 min/flight.
- ‘ATC capacity/staffing’ was the top delay cause last week (75% of all en-route ATFM delays), followed by ‘Others’ (16%).
- The average jet fuel price was at 2.13 USD/gallon on 21 March, a 1% increase on two weeks earlier.
- EUROCONTROL billed 744M€ in en-route charges in February 2025, 17%* above the amount billed for February 2024 flights, reflecting more service units (+8%*) and higher unit rates (11%). The average distance per flight again increased (+6% in February 2025 vs February 2024) as well as the average weight per flight (+4%).

* Growth rate not adjusted for leap year effect.

Top 10 busiest States

On week 17-23 Mar 2025

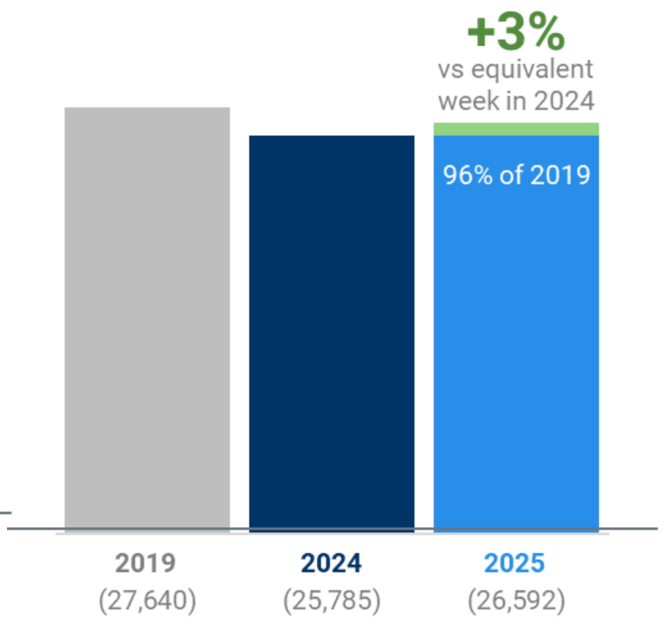
(all flights excl. overflights compared with previous week)



Traffic situation

Average daily flights (including overflights)

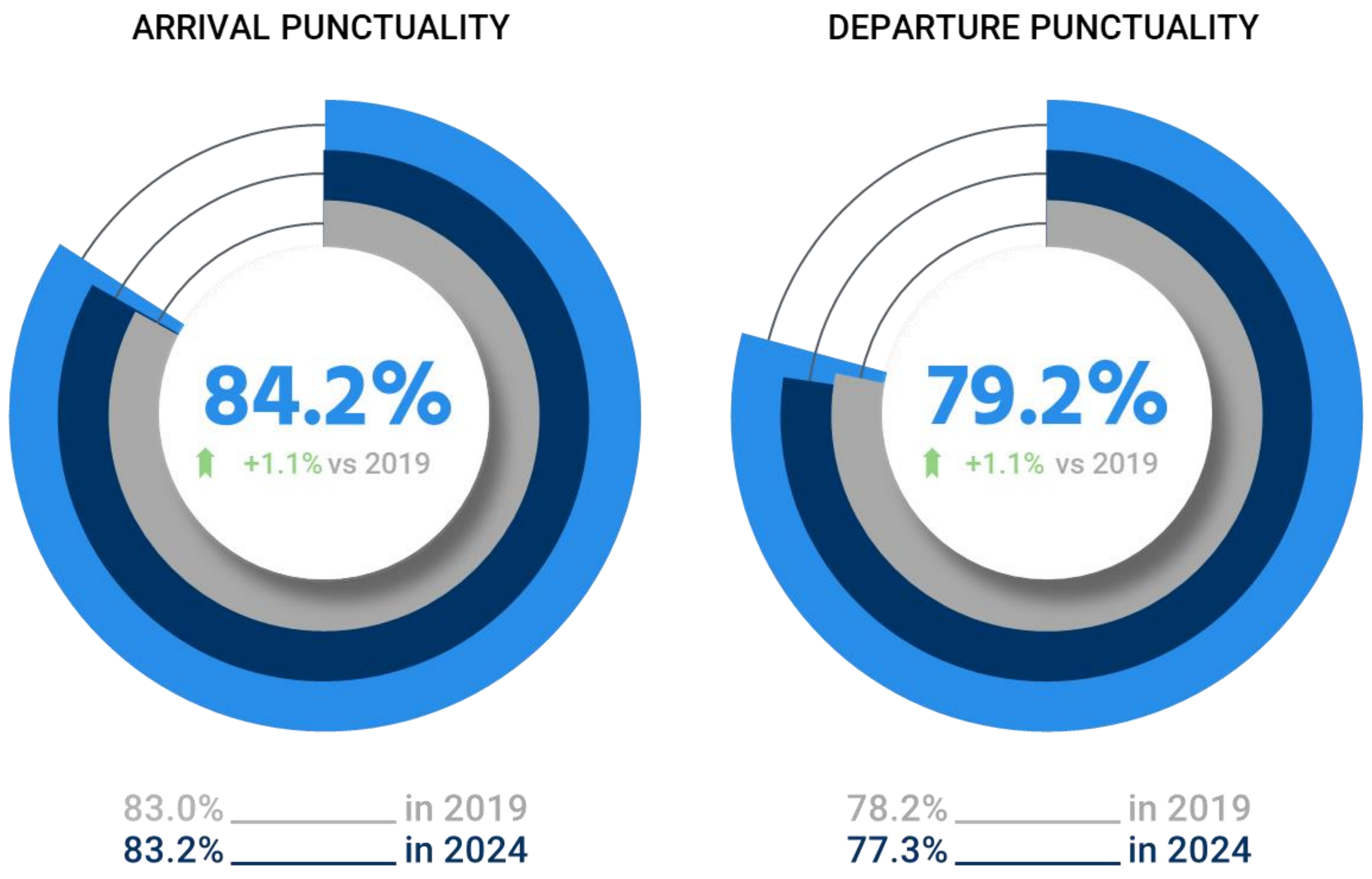
Week 17-23 Mar 2025



Arrival & departure punctuality

(all network scheduled flights)

Week 17-23 Mar 2025



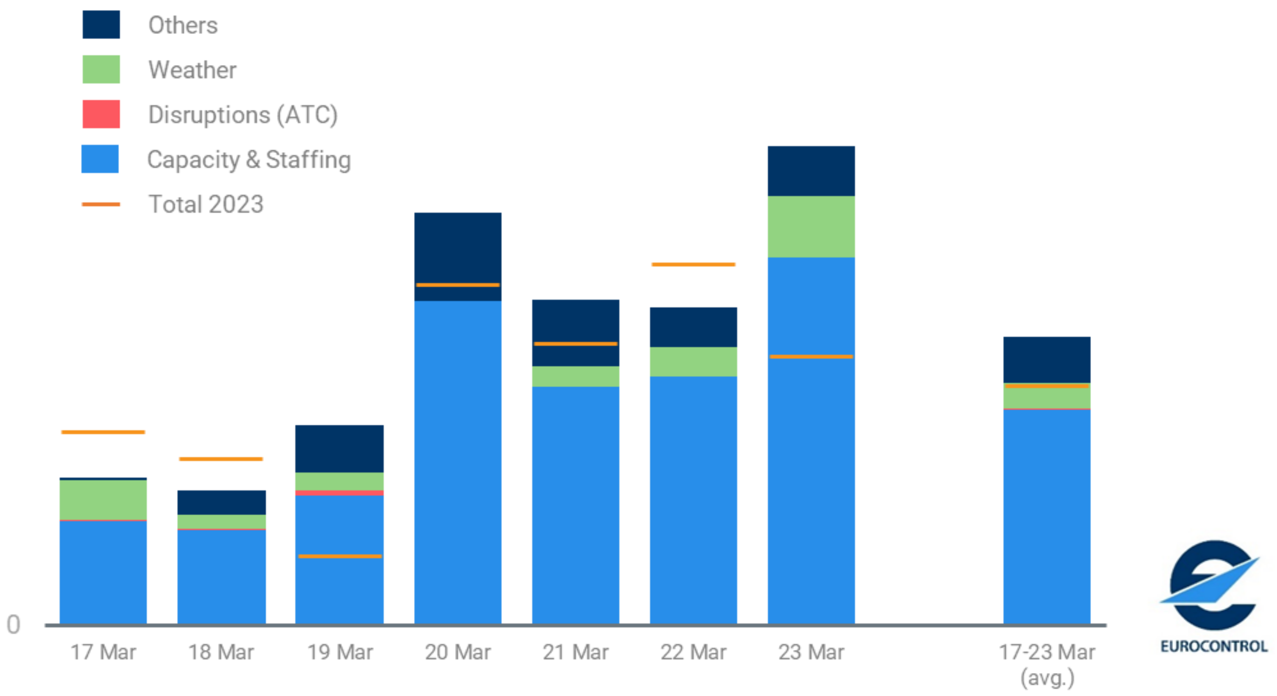
The pictures show the share of flights arriving/departing no later than 15 minutes after/before the scheduled time (OTP15).

- Network punctuality improved when compared to the equivalent week in 2024. Arrival punctuality increased by 1.0 percentage points to 84.2%, with departure punctuality increasing by 2.1 percentage points to 79.2%; compared to the same week in 2019, both arrival and departure punctuality are better (+1.1pp each).
- Lisbon airport suffered from weather (multi-factors of thunderstorm, winds and low visibility) throughout the week, with 17 and 22 March seeing high delays.
- Barcelona airport was also affected by weather with low visibility causing regulations on 20 and 21 March--with a regulation for CB activity on 23 March causing the highest delays.
- Nice airport saw regulations for varying reasons (ATC capacity, ATC staffing, aerodrome capacity and weather causes).
- Zurich airport was regulated due to non-optimal north easterly winds on 17 March, with the LSZH TMA redesign project also causing (smaller impact) regulations throughout the week.
- Athens airport saw daily regulations for ATC capacity.
- Finally, Amsterdam airport saw daily aerodrome capacity regulations although the ATFM delays were lower than last year.

En-route ATFM delays

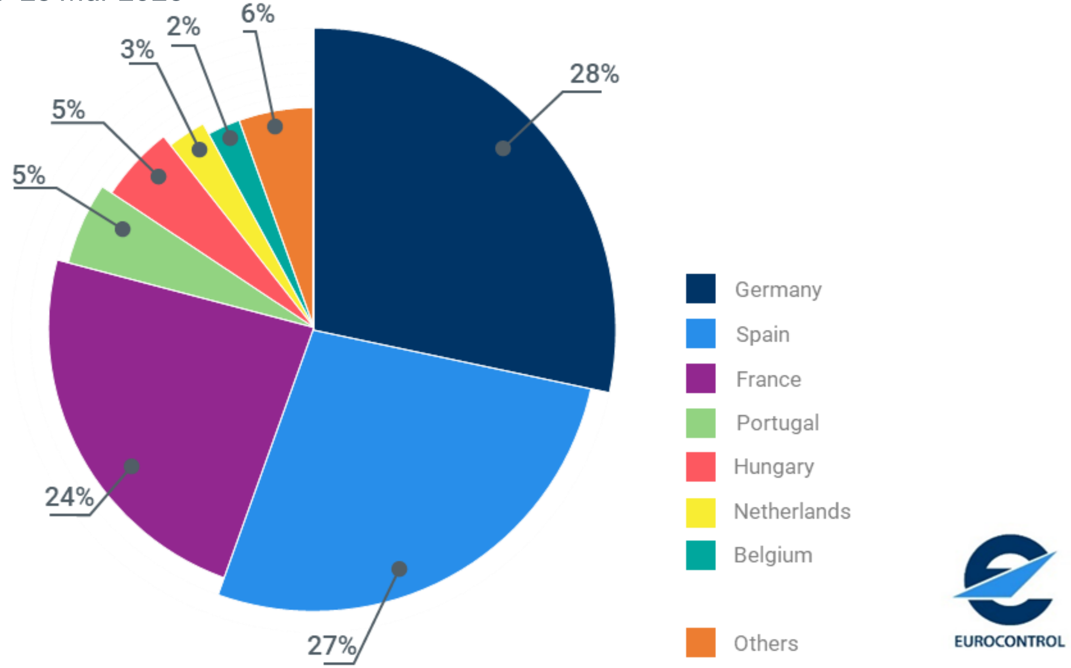
Delays per cause (EUROCONTROL Area)

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



Share of en-route ATFM delays

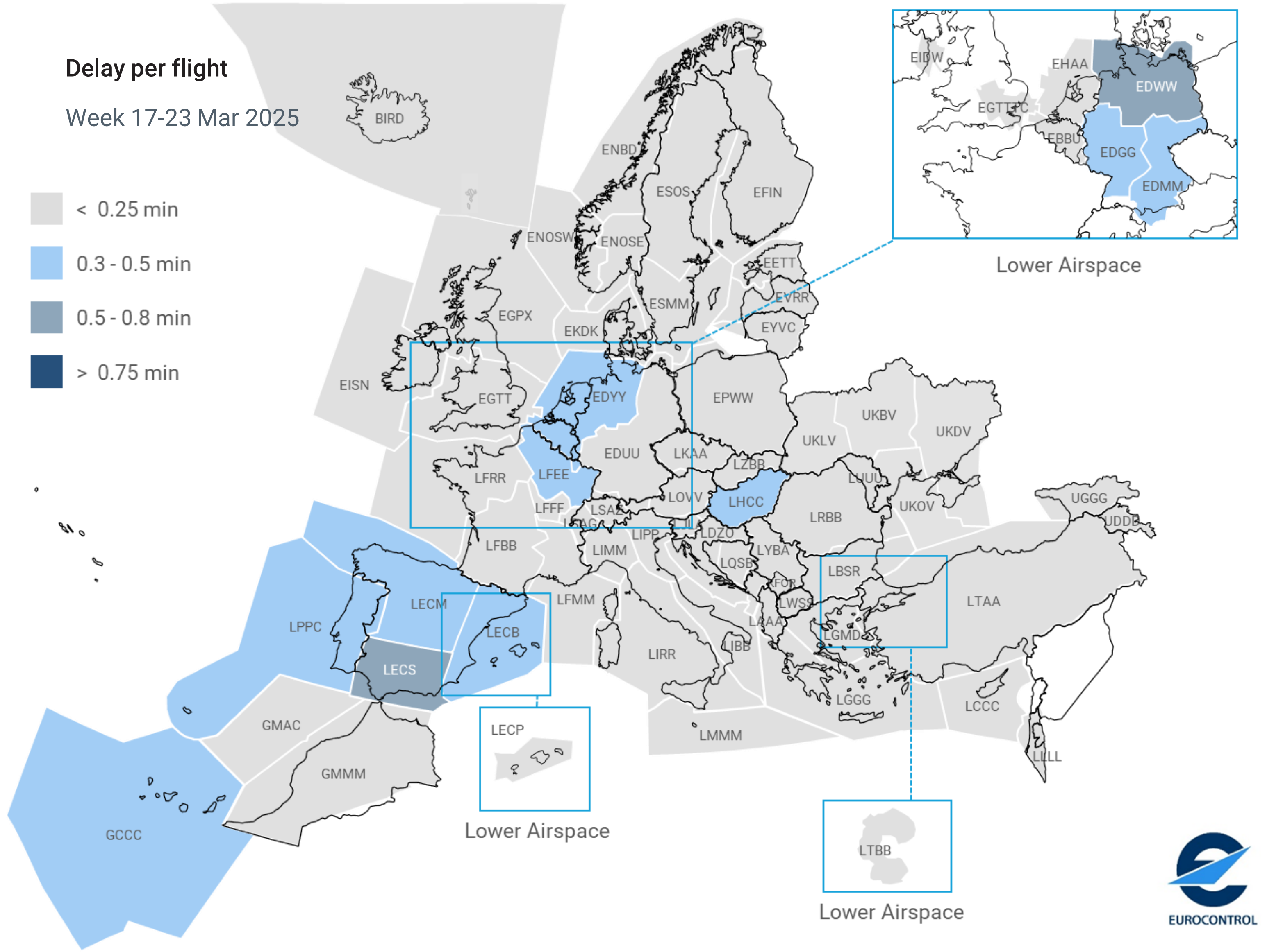
Week 17-23 Mar 2025



- Week 12 (17 – 23 Mar) registered higher en-route ATFM delays than Week 11 (+74%), with an average of 13,374 daily minutes – 20% higher than for the same operational week of 2024.
- ATC capacity/staffing was responsible for 75% of all en-route ATFM delays, especially in Germany and Spain. The "Others" cause, accounting for 16%, was mainly recorded in Maastricht UAC where precautionary ATFM measures were put in place following the initial migration phase of the implementation of PYXIS project, a major multifaceted airspace restructuring above the Netherlands and northwest Germany.
- Total ATFM delay was 1.0 min/flight in Week 12, made up of 0.5 min/flight en-route delay and 0.5 min/flight airport. Total ATFM delay was 59% higher than in Week 11.

- Germany accounted for 28% of all en-route ATFM delays, mainly at Langen ACC (8.8pp with 5.3pp due to "Capacity" and 3.0pp for "Staffing" issues), Bremen ACC (5.4pp with 2.7pp "Capacity" and 2.4pp "Staffing"), Munich (5.1pp) and Karlsruhe UAC (3.7pp).
- Spain accounted for 27% of all en-route ATFM delays, mainly at Madrid ACC (8.3pp, all due to "Capacity"), Seville ACC (8pp, mainly "Capacity") and Barcelona ACC (7.5pp).
- France accounted for 24% of all en-route ATFM delays with notably Reims ACC (6.2pp with 3.8pp "Capacity" and 1.8pp "Staffing"), Paris ACC (5.2pp with 3.9pp "Capacity" and 1.1pp "Weather"), Marseille ACC (4.7 pp), Brest (1.4 pp) and Bordeaux (0.9 pp).

En-route ATFM delayed flights per Area Control Centre



- In Week 12 (17 - 23 March), no ACCs recorded en-route ATFM delays higher than 1.0 min/flight.
- Seville ACC recorded 0.74 min/flight as it continues facing high demand exceeding the available sector capacities, with traffic above 2019 levels by 34%.
- Bremen ACC recorded 0.56 min/flight (and Langen ACC recorded 0.40 min/flight) as both centres experienced capacity and staffing issues.
- Barcelona ACC recorded 0.42 min/flight, impacted by "Capacity" and "Weather" delays (traffic +21% vs 2019). Around 50% of the ATFM delay of the ACC resulted from Valencia TMA capacity issues.
- Lisbon ACC recorded 0.36 min/flight as demand exceeded sector capacities (traffic +22% vs 2019), mostly at the weekend.

Top 10 States

Departures and arrivals

Week 17-23 Mar 2025

See more

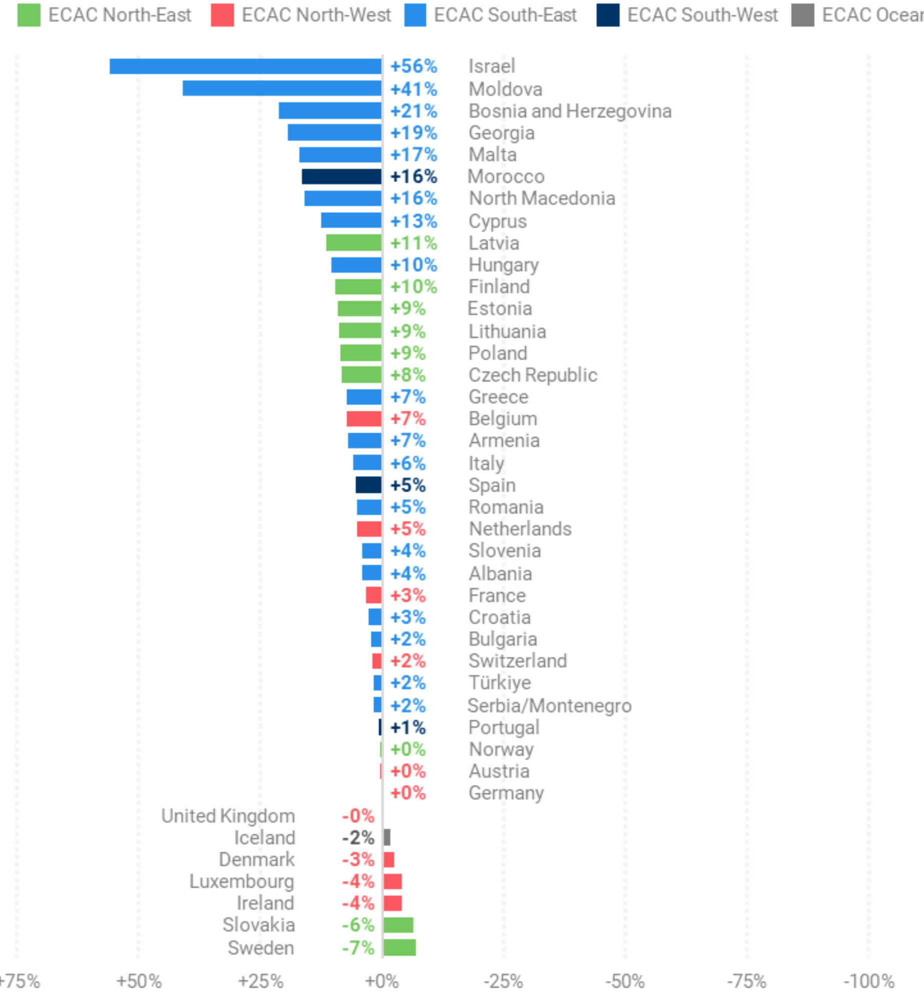
No.	Country	Average daily flights	% prev week	% prev year	% 2019
1.	United Kingdom	4,871	-3%	-0%	-9%
2.	Spain	4,541	+1%	+5%	+17%
3.	Germany	4,411	+11%	+0%	-18%
4.	France	3,792	+1%	+3%	-4%
5.	Italy	3,268	+1%	+6%	+8%
6.	Türkiye	2,475	+3%	+2%	+9%
7.	Netherlands	1,560	-1%	+5%	-3%
8.	Switzerland	1,277	+1%	+2%	-4%
9.	Norway	1,276	-0%	+0%	-8%
10.	Poland	1,121	+3%	+9%	+14%

- The top 10 States, in aggregate, recorded 1.8% more flights than in the previous week.
- Germany recorded the greatest increase (+11%), mainly on Lufthansa domestic flows; this was principally due to a recovery from a 24h ground staff strike at German airports in the previous week (Monday 10 March).
- UK recorded a decline (-3%) owing to the closure of London Heathrow airport on 21 March linked with a power outage caused by a fire at a nearby electrical substation.
- Four States in the top 10 (Spain, Poland, Türkiye and Italy) are recording traffic above 2019 levels, with the remainder between 3% and 18% below pre-COVID levels.
- Traffic to/from Israel is up +56% 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 17-23 Mar 2025



*Based on integrated ANSP

Top 10 aircraft operators

Week 17-23 Mar 2025 (avg daily flights)

See more

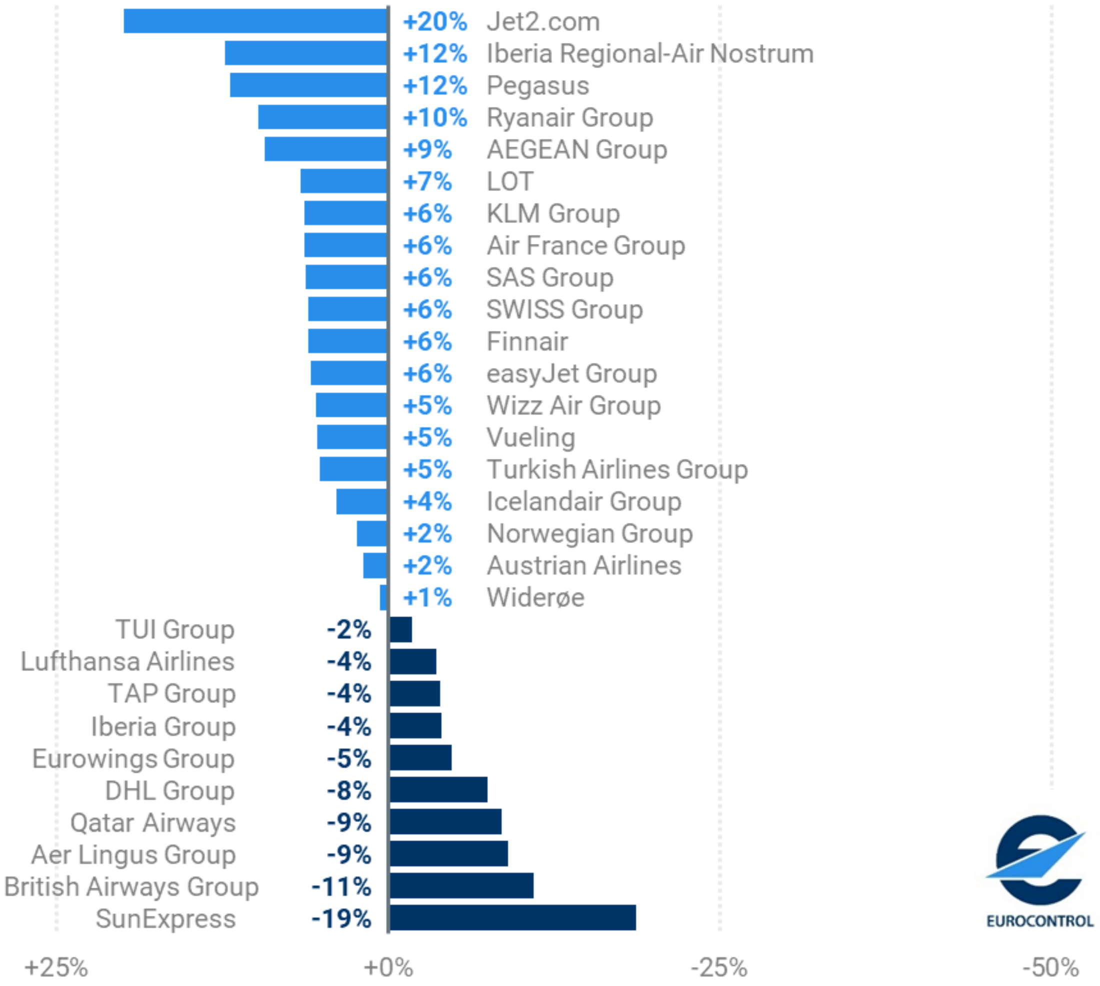
No.	Aircraft operator	Average daily flights	% prev week	% prev year	% 2019
1.	Ryanair Group	2,699	+0%	+10%	+40%
2.	easyJet Group	1,461	+0%	+6%	-6%
3.	Turkish Airlines Group	1,332	+2%	+5%	+7%
4.	Lufthansa Airlines	1,105	+16%	-4%	-27%
5.	Air France Group	938	+1%	+6%	-20%
6.	KLM Group	835	+0%	+6%	+6%
7.	Wizz Air Group	782	+0%	+5%	+67%
8.	British Airways Group	735	-10%	-11%	-19%
9.	SAS Group	664	+0%	+6%	-25%
10.	Vueling	573	+1%	+5%	+18%

- The top 10 aircraft operators, in aggregate, recorded 1.1% more flights than in the previous week.
- All but one of the top 10 aircraft operators recorded equivalent or more flights than during the previous week.
- Lufthansa increased by far the most (+16%, see previous slide) mainly on domestic flows in Germany.
- Half of the airlines in this top 10 (Ryanair, easyJet, KLM, Wizz Air and SAS) recorded slightly higher or similar number of flights compared to previous week, translating a relatively quietness in the schedules at the end of the Winter season (30 March).
- British Airways declined by 10%, mainly owing to the closure of London Heathrow airport (see previous slide).
- Five of the top 10 carriers/groups (Wizz Air, Ryanair, Vueling, Turkish Airlines and KLM) are recording traffic above the 2019 levels .

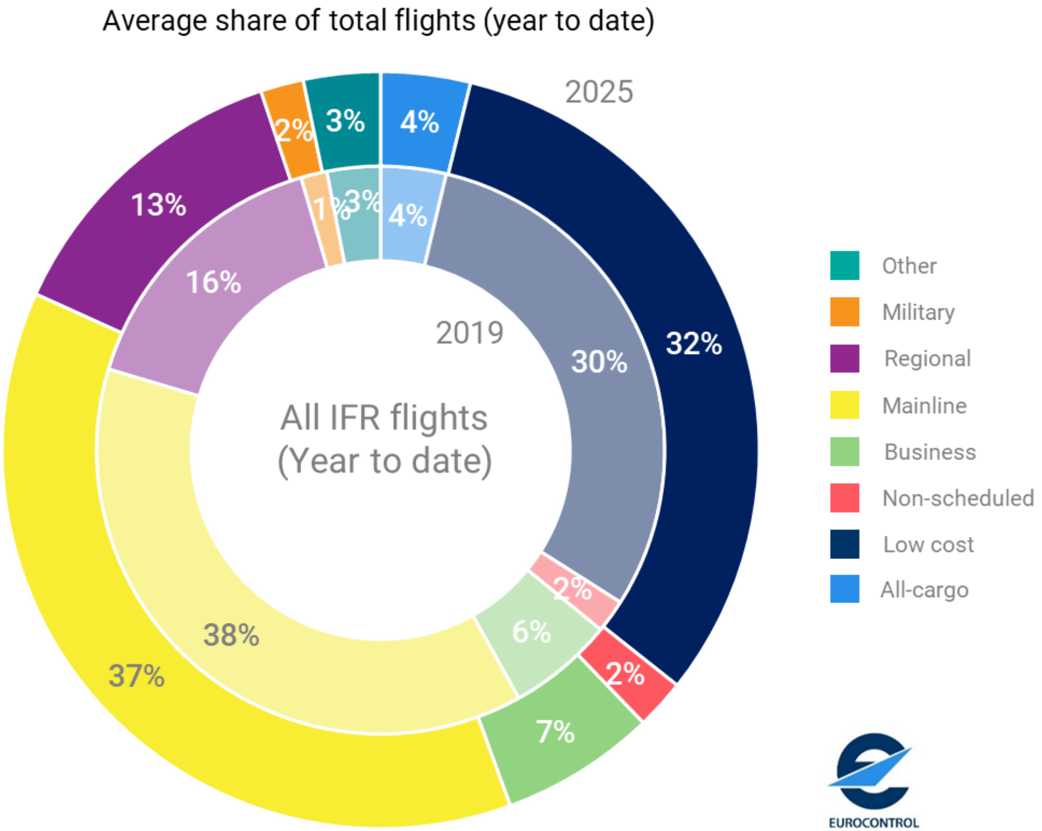
Aircraft operators in the EUROCONTROL Network

Compared to the equivalent week in 2024

Dep/Arr flights for week 17-23 Mar 2025



Market segments in the EUROCONTROL Network

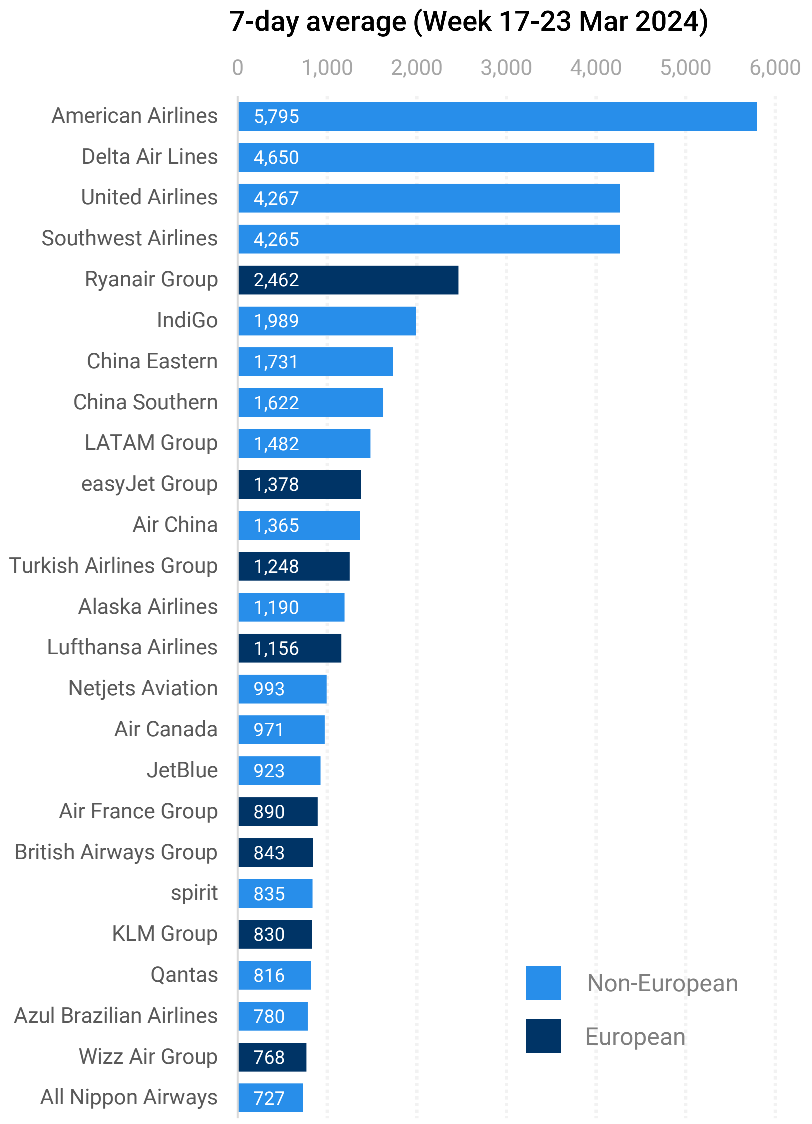


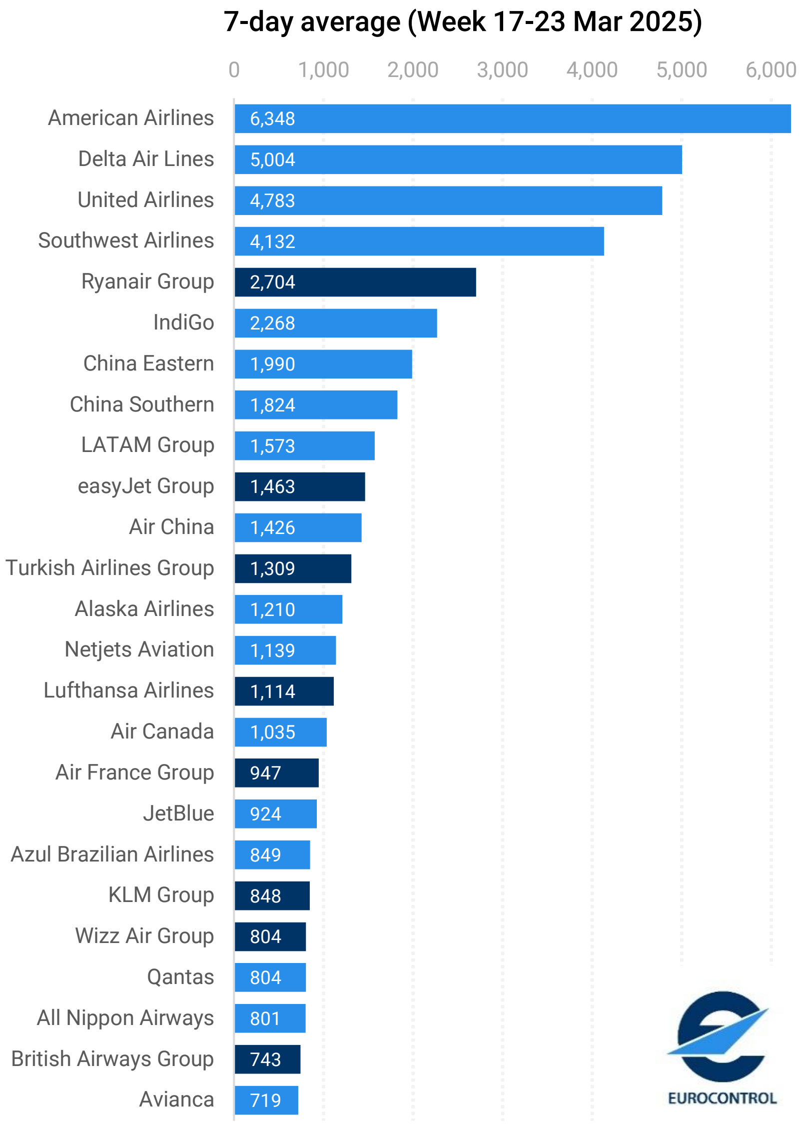
No.	Market segment	Avg. flights	% prev week	% prev year	% 2019
1.	Mainline	9,596	+1%	+2%	-4%
2.	Low Cost	8,576	+1%	+7%	+9%
3.	Regional	3,519	+3%	+1%	-12%
4.	Business	1,772	+0%	-4%	+9%
5.	Other	1,027	+12%	+5%	-39%
6.	All-cargo	1,014	+1%	+0%	+9%
7.	Non-Scheduled	550	+3%	+1%	-3%
8.	Military	543	+8%	+16%	+28%

- For the year-to-date, the largest market segment (Mainline) occupies a 37% share, a 1 pp contraction 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 general increase for all market segments: increases for Mainline (+1%), Low cost (+1%) and Regional (+3%), Non-scheduled (+3%). Business aviation only sightly increased (+0.1%) compared to previous week.
- Excluding Other and Military, only three of the six market segments recorded flights above 2019 levels: Business Aviation (+9%) and Low cost (+9%) and All-cargo (+9%). Mainline, Regional and Non-Scheduled, however, were below their 2019 levels at -4%, -12% and -3% respectively.

Top 25 global aircraft operators

(average daily departure flights)

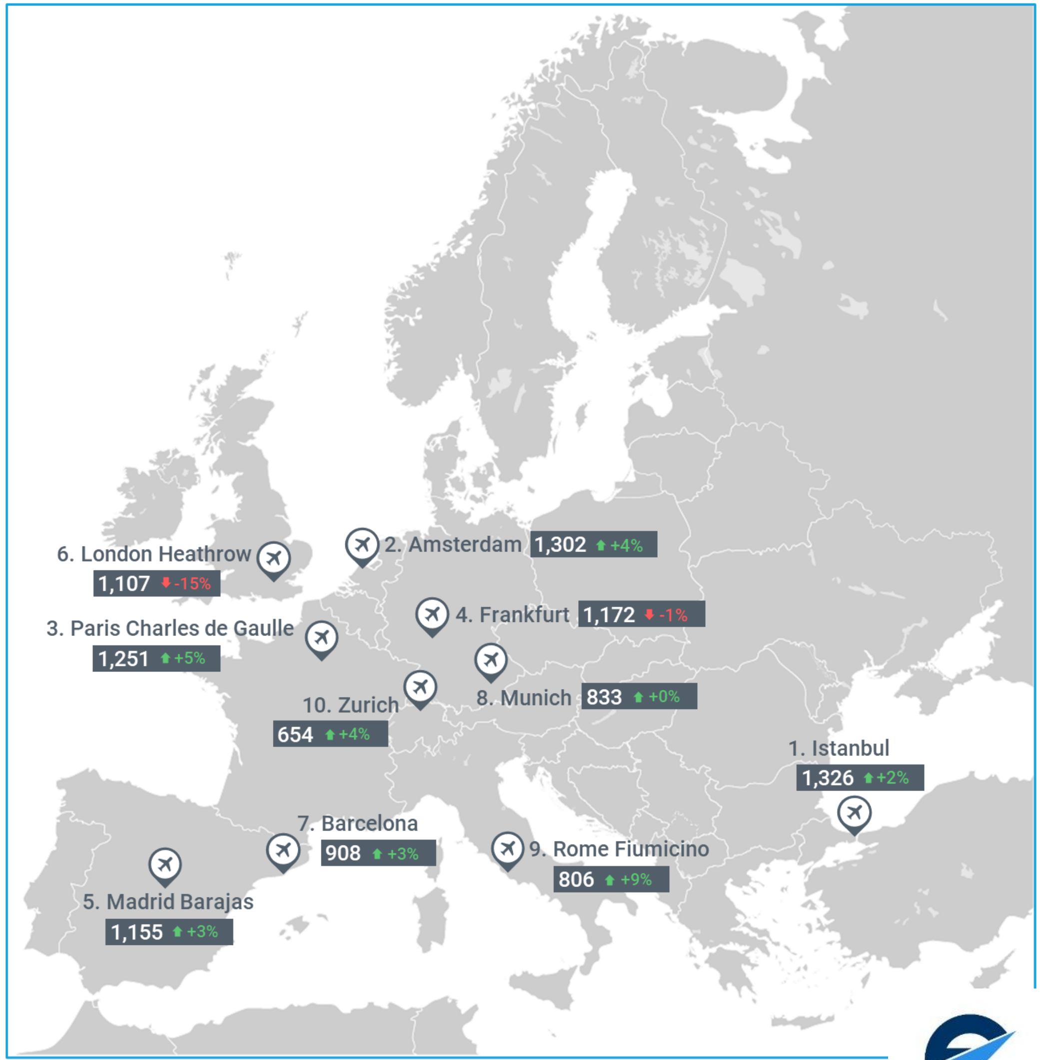




Source: Flightradar24 Historical Global Utilisation data

- 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), KLM Group (20th), Wizz Air Group (21st), and British Airways Group (24th).

Top 10 airports



Airport ranking

Week 17-23 Mar 2025

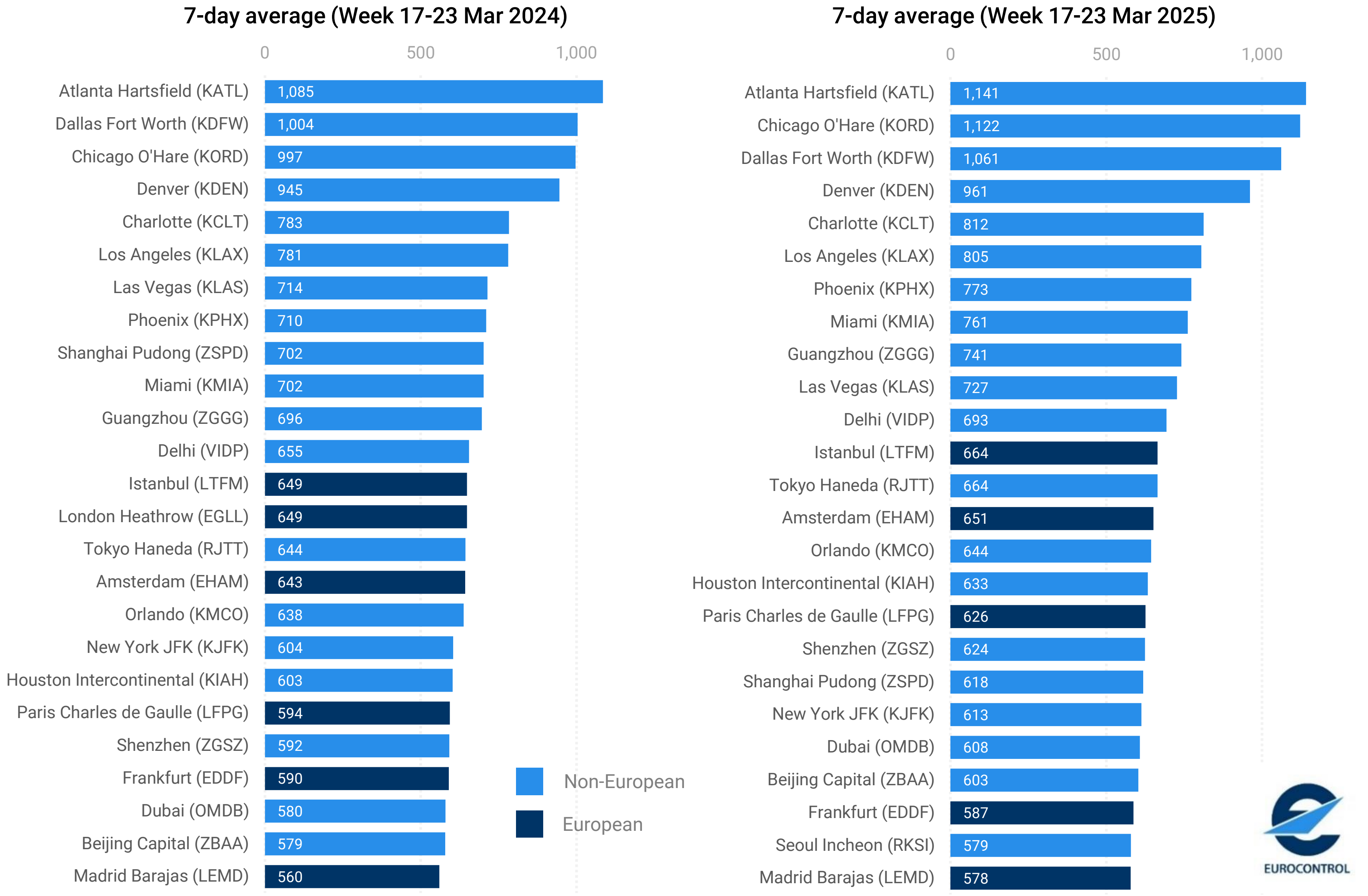
See more

No.	Airport	Avg. daily dep/arr flights	% prev week	% prev year	% 2019
1.	Istanbul	1,326	+2%	+2%	n/a
2.	Amsterdam	1,302	+1%	+4%	-2%
3.	Paris Charles de Gaulle	1,251	+1%	+5%	-3%
4.	Frankfurt	1,172	+15%	-1%	-13%
5.	Madrid Barajas	1,155	+1%	+3%	+4%
6.	London Heathrow	1,107	-13%	-15%	-15%
7.	Barcelona	908	+2%	+3%	+9%
8.	Munich	833	+14%	+0%	-25%
9.	Rome Fiumicino	806	-1%	+9%	+4%
10.	Zurich	654	-2%	+4%	-6%

- Compared with the last edition, there were some changes in the top 10: London Heathrow dropped from first to sixth place, while Istanbul, Amsterdam, Paris CDG and Frankfurt all moved up one place.
- Istanbul (1,326 flights per day, +2% vs the previous week), Amsterdam (1,302, +1%) and Paris CDG (1,251, +1%) are the busiest airports.
- London Heathrow operations were suspended on Friday 21 March, owing to a major incident in the vicinity of the airport affecting power supply. Around 120 inbound airborne flights were diverted and a further 1,200 did not operate as planned. The airport became available again late afternoon for a limited number of repatriation and repositioning flights.
- All of Week 12's top airports (except Istanbul and Lufthansa) recorded more flights than in the same week in 2024, with the highest growth at Rome Fiumicino (+9%).
- 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)



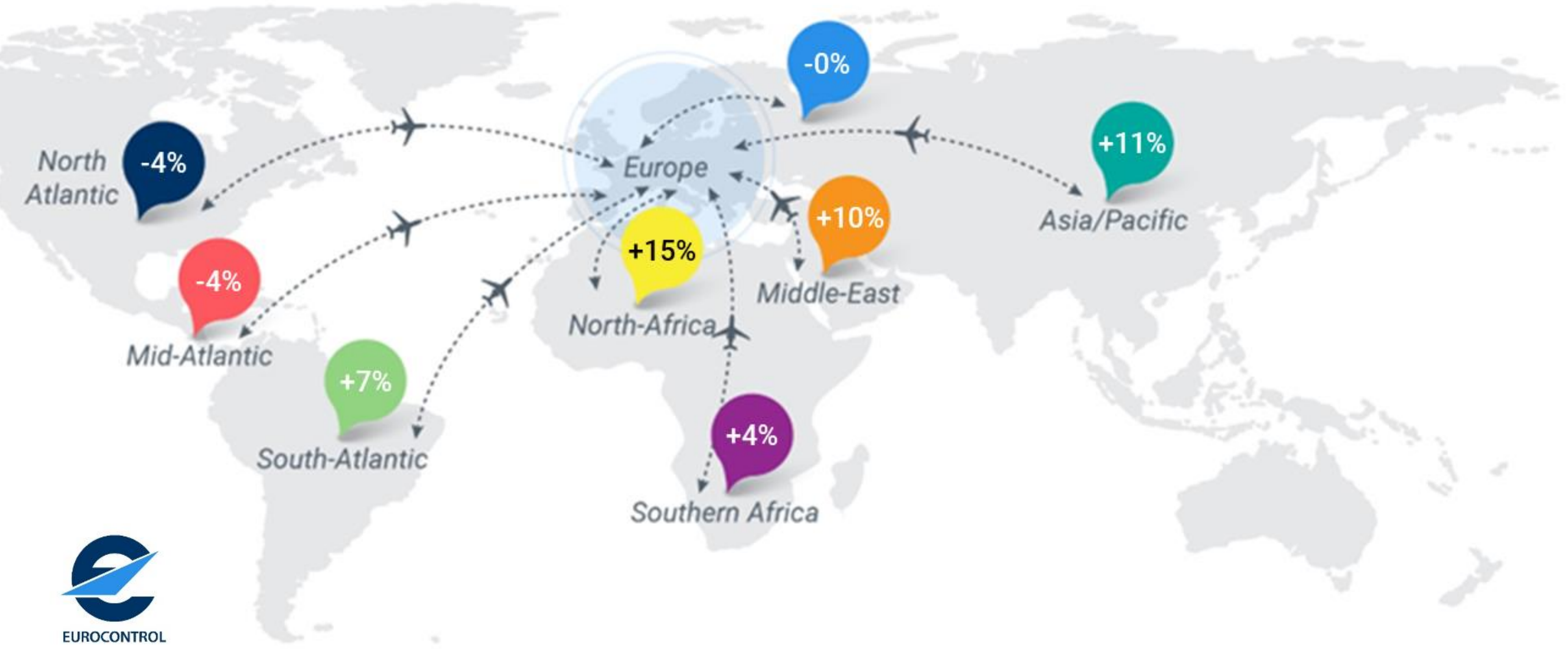
Source: Flightradar24 Historical Global Utilisation data

- Over the last week, five European airports made the top 25 in terms of global airport departures (one fewer than in the corresponding week in 2024).
- There are two European airports in the top 15: Istanbul (12th) and Amsterdam Schiphol (14th).
- The other European airports in the top 25 are Paris CDG (17th), Frankfurt (23rd) and Madrid (25th).
- Compared to the same week in 2024, London Heathrow came out of the top 25 (closure on Friday 21 March, see previous slides)
- The top 10 global airport ranking is dominated by US airports, with the exception being Guangzhou airport (9th).

Traffic flows

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

Region	Average daily flights	% prev week	% prev year	% 2019
Intra-Europe	20,335	+2%	+2%	-5%
Europe ↔ Middle-East	1,369	+6%	+10%	+1%
Europe ↔ North-Africa	1,141	+2%	+15%	+19%
Europe ↔ North Atlantic	1,087	+0%	-4%	+11%
Europe ↔ Asia/Pacific	894	+2%	+11%	+14%
Europe ↔ Southern Africa	315	-1%	+4%	+0%
Europe ↔ Other Europe	235	+2%	-0%	-71%
Europe ↔ South-Atlantic	196	-0%	+7%	+14%
Europe ↔ Mid-Atlantic	190	-3%	-4%	+2%
Non Intra-Europe	5,427	+2%	+7%	-2%



- The main intra-European traffic flow recorded 20,335 daily flights last week, 2% higher than the previous week. Intercontinental flows amounted to 5,427 daily flights on average, 2% higher than the previous week.
- The second-largest flow is with the Middle East, with 1,369 flights per day (+6% compared with the previous week with main increases on the Iran ↔ 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 1,141 average daily flights (+2% compared with the previous week, owing mainly to increases on the France ↔ Algeria, Italy ↔ Tunisia and the Egypt ↔ Germany flows).
- The fourth-largest flow is with North-Atlantic, with 1,087 daily flights (unchanged from previous week), but recording a slight decrease (-4%) on the same week last year.
- The flow between Europe and the Asia/Pacific region (894 flights per day, +2% owing to increase on Germany ↔ China) shows traffic +11% 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 -71% compared with 2019.

Top 10 long-haul country pairs

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

Week 17-23 Mar 2025

No.	Country pair	Average daily flights	% prev week	% prev year	% 2019
1.	UK ↔ US	238	-8%	-14%	-11%
2.	Germany ↔ US	148	+17%	+1%	-2%
3.	France ↔ US	106	+2%	+2%	+16%
4.	Netherlands ↔ US	68	-1%	-4%	+4%
5.	UAE ↔ UK	61	-6%	-4%	-2%
6.	Italy ↔ US	56	-0%	+6%	+55%
7.	Spain ↔ US	54	-2%	-1%	+15%
8.	Ireland ↔ US	53	+1%	-11%	+7%
9.	Russia ↔ UAE	50	+0%	+15%	+1312%
10.	Egypt ↔ Russia	48	+7%	+35%	n/a

- Seven 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 and Egypt ↔ Russia.
- Half of the long-haul flows posted increases on the previous week with main increases on Germany ↔ US (+17%) and Egypt ↔ Russia (+7%). Biggest decreases were recorded on flows with the UK: UK ↔ US (-8%) and UAE ↔ UK (-6%).
- Half of the top long-haul flows recorded more traffic vs 2024 with double-digit increases on two of them: Russia ↔ UAE and Egypt ↔ Russia.
- Seven flows are currently above 2019 levels, notably Russia ↔ UAE, Italy ↔ US (+55%), France ↔ US (+16%) and Spain ↔US (+15%).

Economics

Week 17-23 Mar 2025

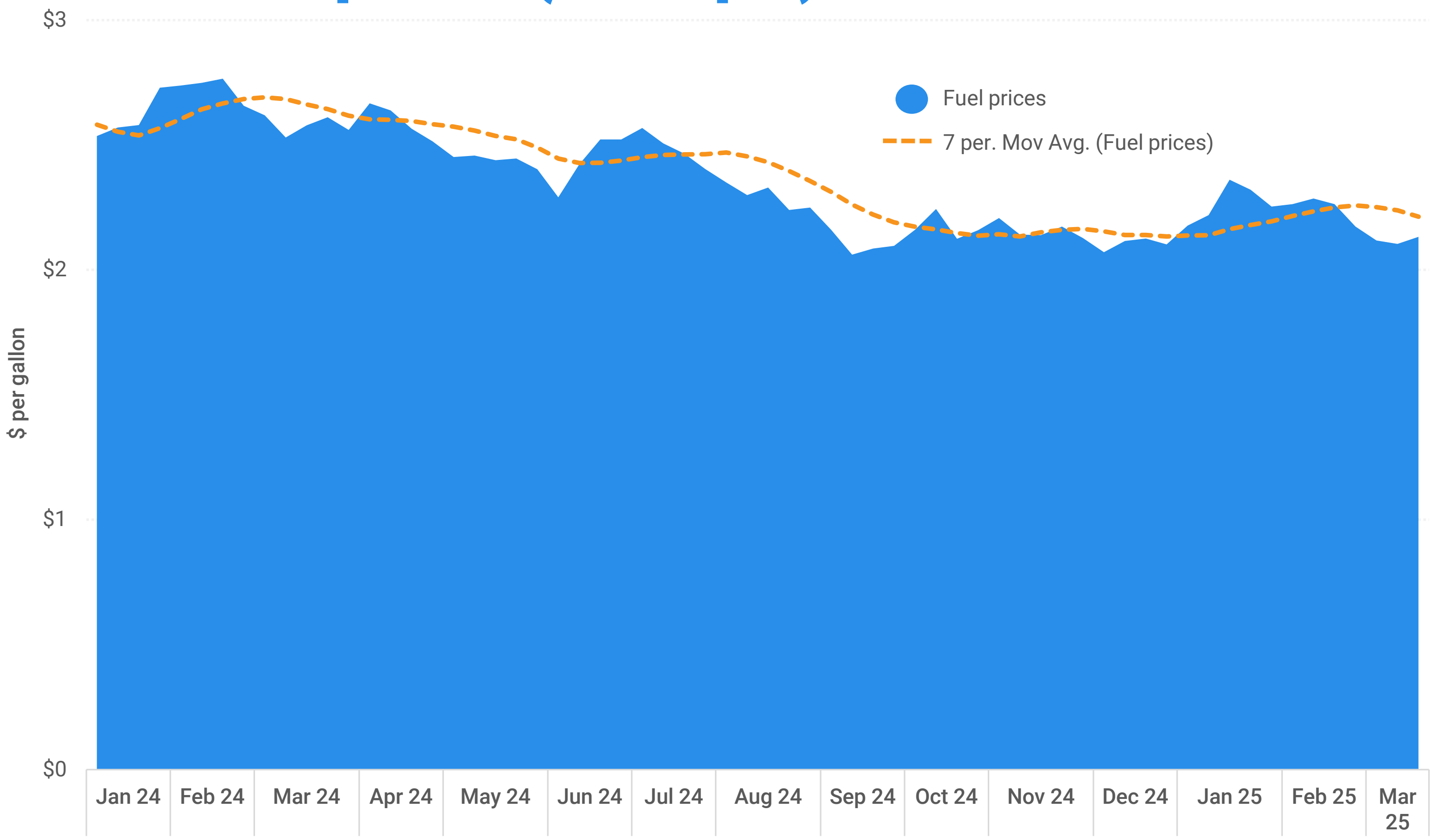
21 Mar 2025
avg fuel price:

$2.13 /gallon

1%
vs. $2.12 /gallon
on 07 Mar 2025

Source: IATA/Platts

Jet fuel price (Europe)

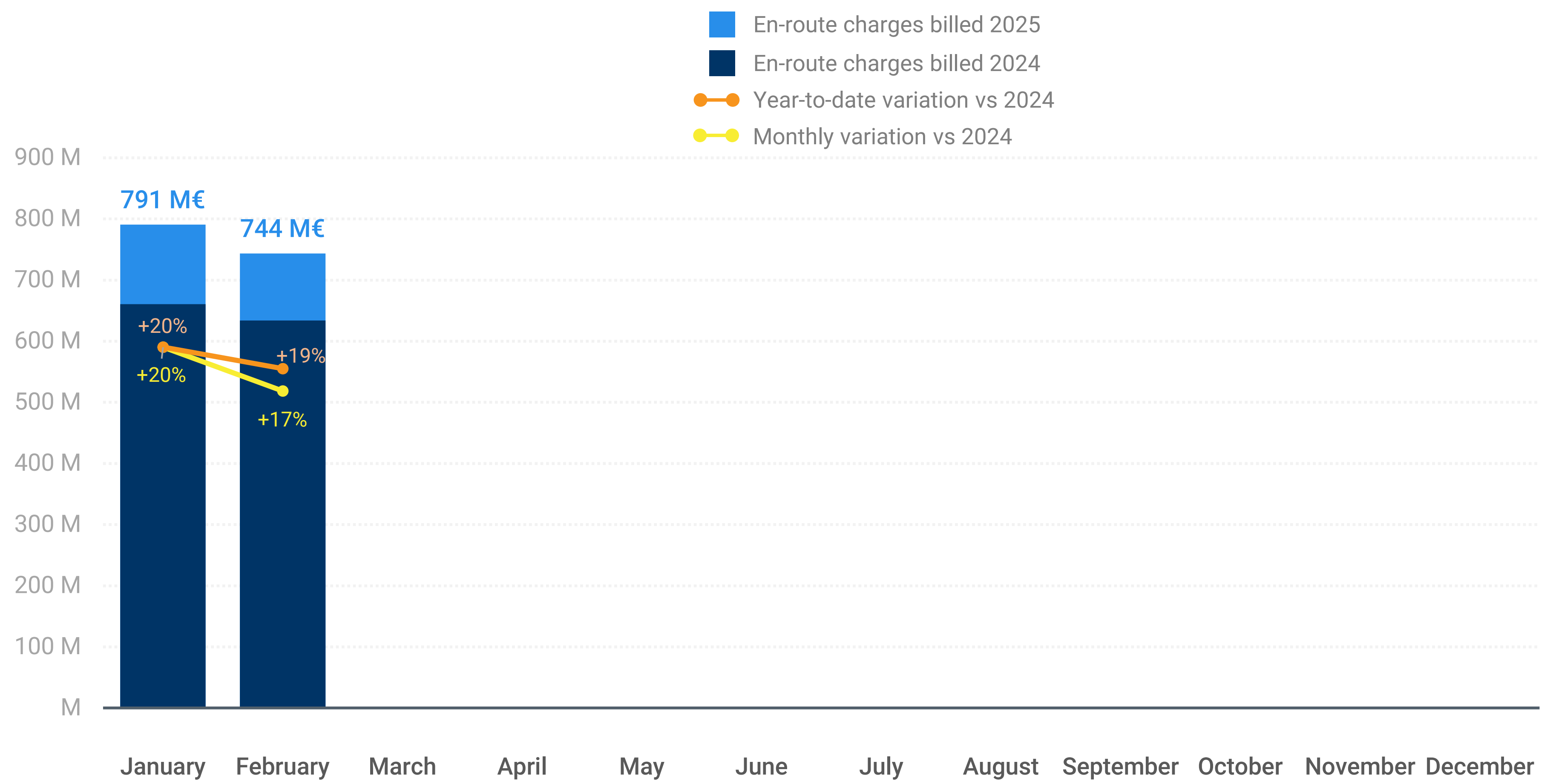


Source: IATA/Platts

- The average price of jet fuel closed at 2.13 USD/gallon on 21 March 2025, a +1% increase 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 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: 1,534 M€ (+19% vs 2024)



- At Network level, 744€ were billed for February 2025 which represents +17%* vs 2024 and +48% vs 2019.
- These changes were driven by the evolution of unit rates and of traffic characterized by the distance flown (+6% on same month last year) and the weight of each aircraft (+4% on same month last year).
- The February 2025 variation (+17%* vs February 2024) is explained by an increase in Unit Rates (+11%) and an increase in total en-route Service Units (+8%*).
- On a year-to-date basis, EUROCONTROL has billed 1,534M€, which is 19%* higher than in 2024 and 46% higher than in 2019.

* *Growth rate not adjusted for leap year effect.*

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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