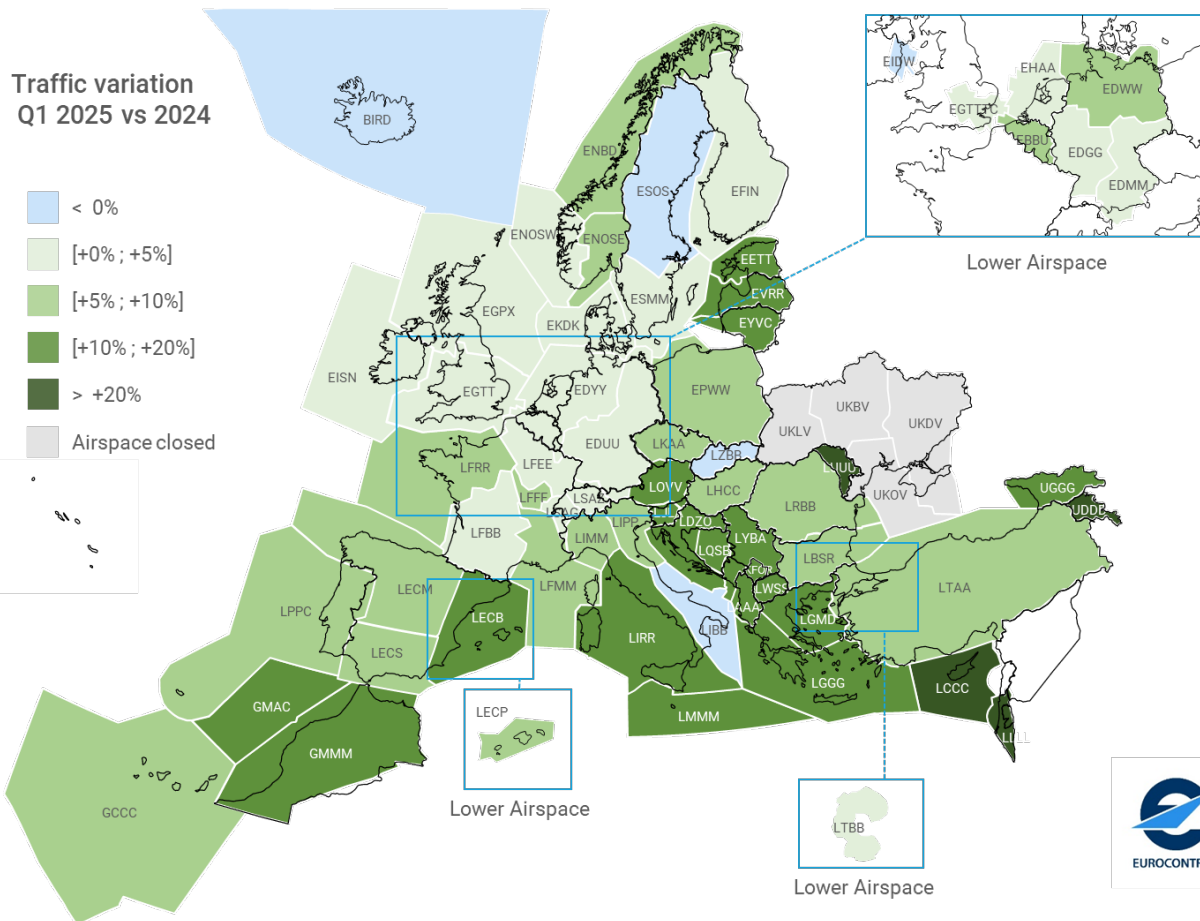


EUROCONTROL Data Snapshot #51

Traffic evolution in Q1 2025: Traffic continues to grow, but growth is not uniform



14 April 2025



Now the first quarter of 2025 is behind us, and as the busy summer period approaches, it is a good time of take stock of how traffic is evolving. The chart shows the change in traffic (all IFR movements including overflights) variation per ACC (Area Control Centre) in the EUROCONTROL area between Q1 2025 and the same period in 2024.

Overall, traffic in the EUROCONTROL area increased by 5% during the period. However, the chart highlights the clear and continuing divide between southern and central/northern Europe. The highest growth is in **South East** Europe, where most ACCs show increases above 10% compared to 2024. This region saw significant capacity delays last summer, driven by strong demand. For Q1 2025, traffic was historically very high, notably in the critical area to the east of the Adriatic, with Tirana ACC over 80% above pre-pandemic levels (2019), Skopje and Zagreb +50% to +60% and Belgrade and Makedonia +35% to +45%.

The growth over the last year in the **South West** is mainly driven by strong seasonal demand to the Canary Islands and Morocco. This is a continuing trend: Seville, Agadir and Casablanca ACCs are now more than 25% above 2019 levels.

Some areas are seeing year-on-year growth but still remain below 2019 levels, such as the Baltic states, Poland and Israel.

A specific case worth noting is the decrease at Brindisi ACC, not due to reduced traffic but to a transfer of sectors to Rome ACC.

As summer approaches, this asymmetric growth is likely to persist. ACCs already handling high increases in 2024 will be under pressure again.

Technical bits: While the map shows a 2024 comparison the accompanying data sheet also includes a comparison with the pre-pandemic levels of 2019.