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EUROPEAN AVIATION OVERVIEW

07-13 Apr 2025

Wednesday 16 April 2025

Headlines

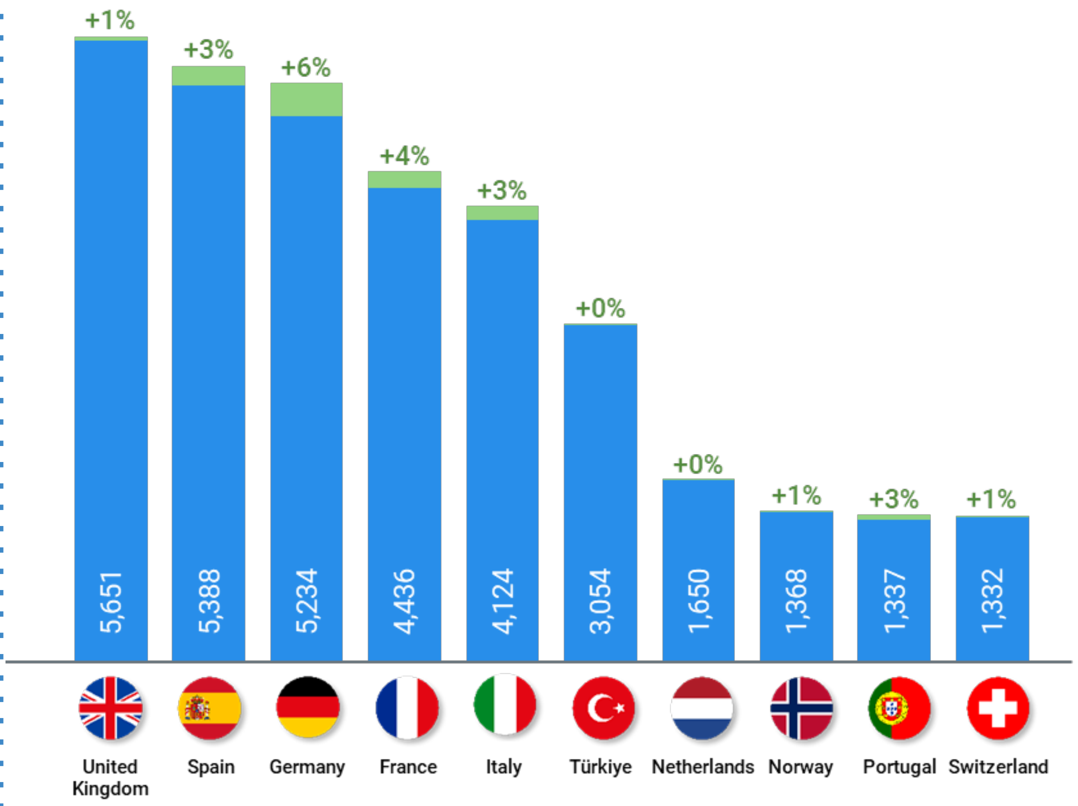
(Week 07-13 Apr 2025)

- The network recorded 30,706 average daily flights in week 15 (+5% vs 2024), above 2019 level (+101%) for the second week in a row.
- The top 10 States, in aggregate, recorded 2.6% flight growth while the top 10 aircraft operators, in aggregate, saw weak growth (+0.3%) (the IATA Summer capacities have already been deployed – at the end of March).
- Year-to-date traffic is 97% of 2019, 5% more than 2024.
- En-route ATFM delays were 29% higher than in the previous week, with a daily average of just below 30,500 minutes. They were twice the level of 2024 and accounted for, on average, 0.99 min/flight.
- 'ATC capacity/staffing' was the top delay cause last week (80% of all en-route ATFM delays), followed by 'Others' (14%).
- The average jet fuel price was at 2.17 USD/gallon on 04 April, a 2% increase on two weeks earlier.
- Based on ACI data, the top 40 European airports welcomed 90 million passengers in February 2025, a 2.8% increase on February 2024 and a 5% increase compared to February 2019 levels.

Top 10 busiest States

On week 07-13 Apr 2025

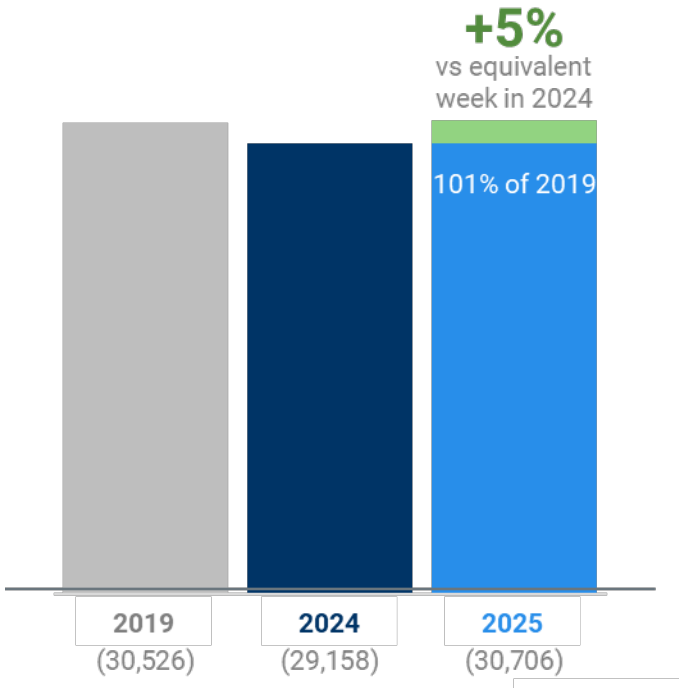
(all flights excl. overflights compared with previous week)



Traffic situation

Average daily flights (including overflights)

Week 07-13 Apr 2025

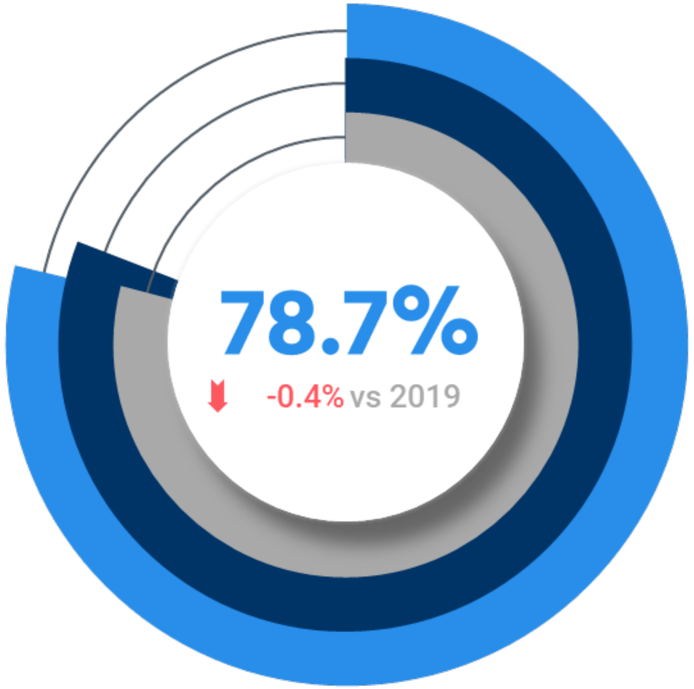


Arrival & departure punctuality

(all network scheduled flights)

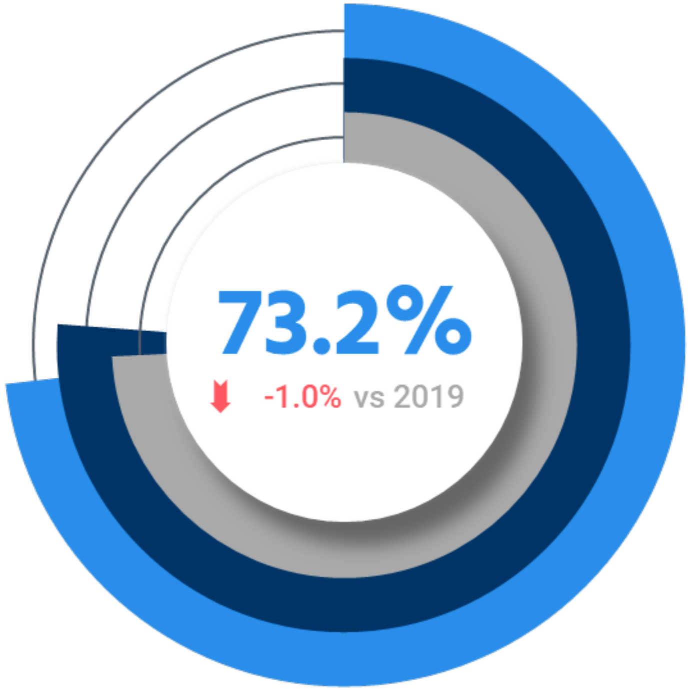
Week 07-13 Apr 2025

ARRIVAL PUNCTUALITY



79.1% in 2019
80.9% in 2024

DEPARTURE PUNCTUALITY



74.2% in 2019
76.2% in 2024

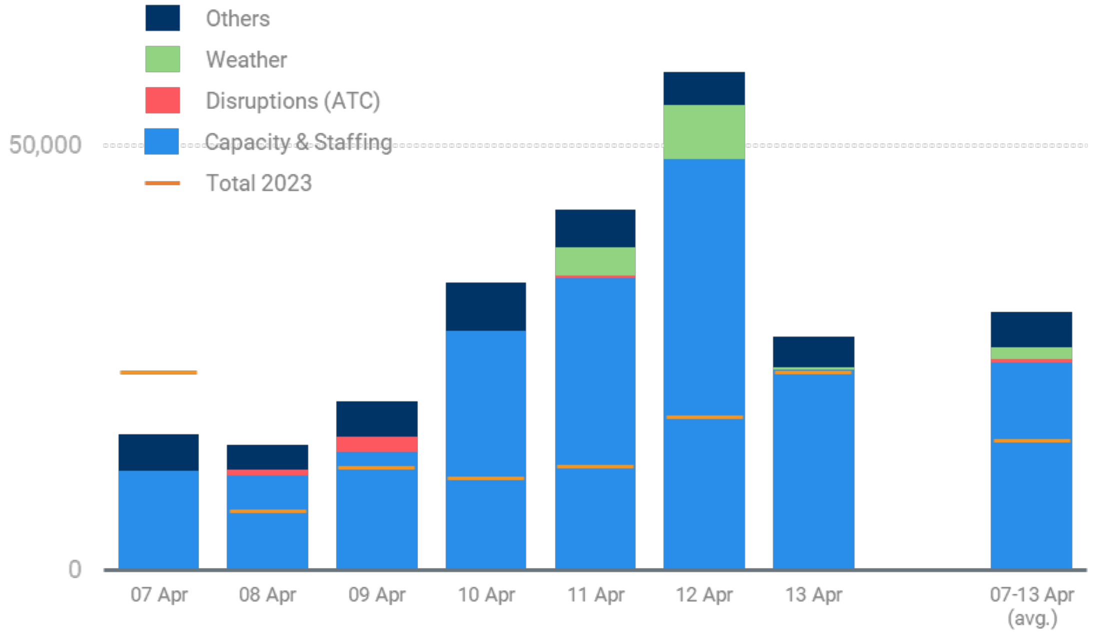
The pictures show the share of flights arriving/departing no later than 15 minutes after/before the scheduled time (OTP15).

- Network punctuality deteriorated when compared to the equivalent week in 2024. Arrival punctuality decreased by 2.2 percentage points to 78.7%, with departure punctuality decreasing by 3.0 percentage points to 73.2%; compared to the same week in 2019, both arrival and departure punctuality are worse (respectively -0.4pp and -1.0pp).
- Athens airport continued to experience daily ATFM regulations; the main driver behind this was that ATC aerodrome capacity was still at its winter rate, despite the IATA summer season commencing at the end of March.
- Lisbon airport mainly suffered from weather delays (multi-factors of thunderstorms and Low Visibility Procedure) with 11 and 12 April notably impacted.
- Nice airport continued to see daily ATC capacity and ATC staffing regulations.
- Tel Aviv airport experienced aerodrome capacity and ATC capacity regulations throughout the week.
- Zurich airport experienced regulations mainly due to the on-going TMA redesign. Weather (north-easterly winds) also caused delays on 07 April.

En-route ATFM delays

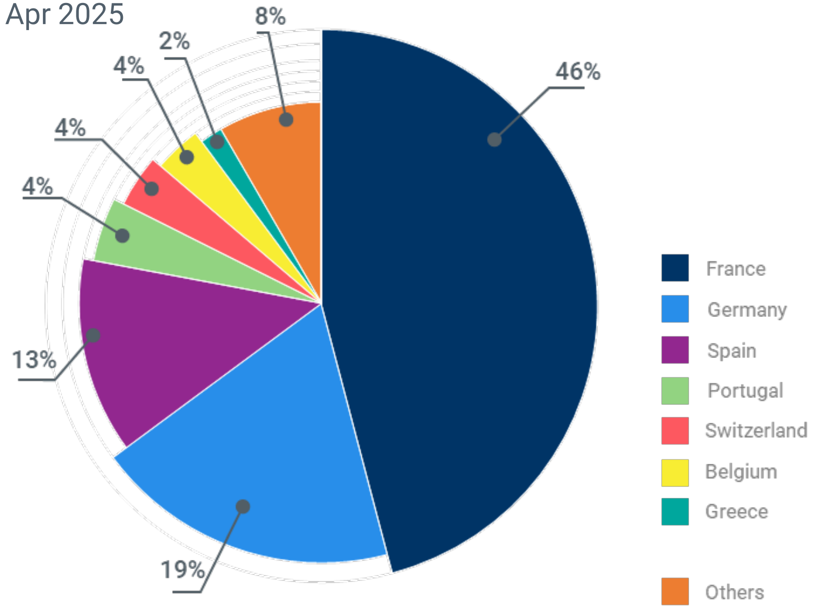
Delays per cause (EUROCONTROL Area)

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



Share of en-route ATFM delays

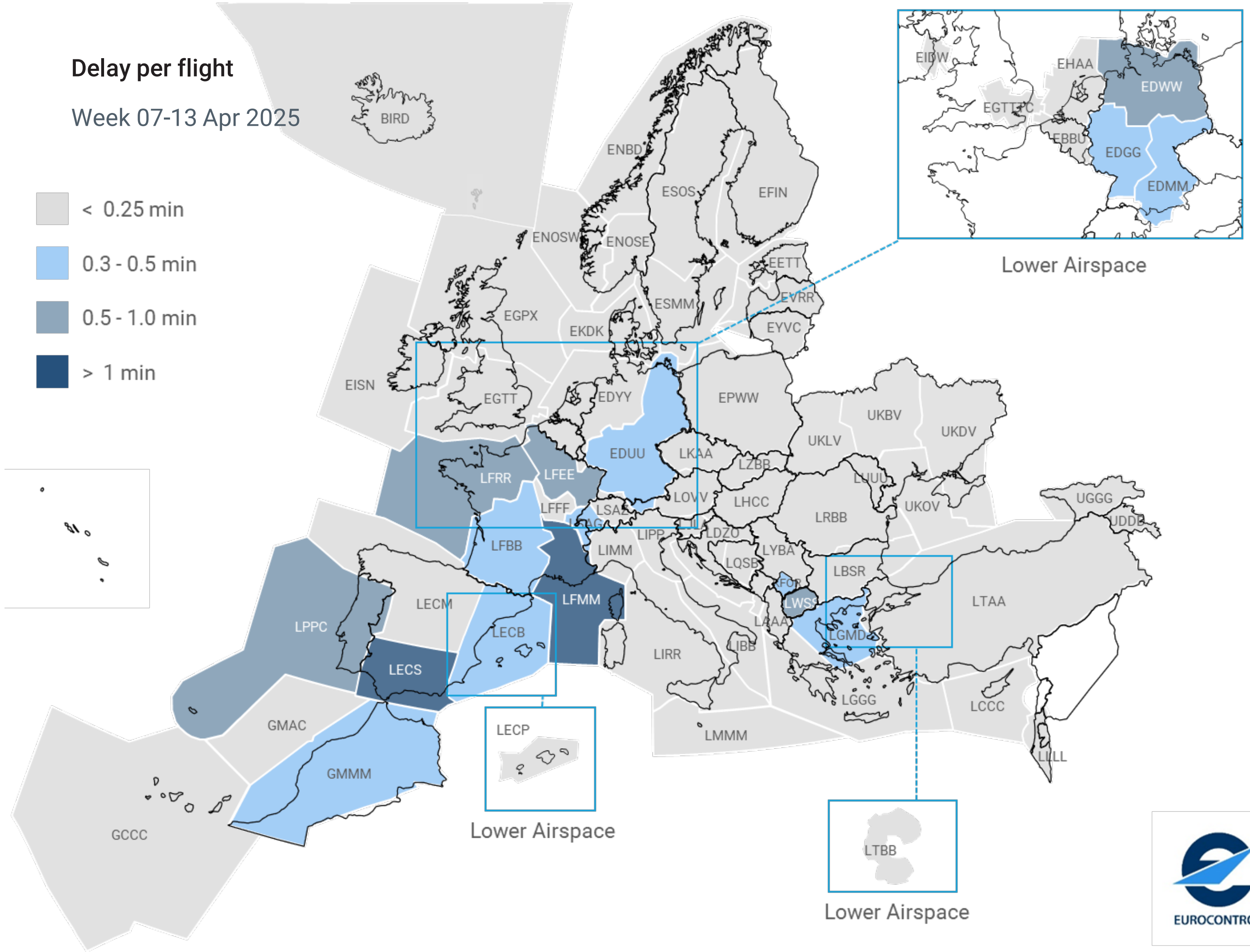
Week 07-13 Apr 2025



- Week 15 (07 – 13 Apr) registered higher en-route ATFM delays than Week 14 (+29%), with an average of 30,445 daily minutes – 99% higher than for the same operational week of 2024. The highest delays were concentrated in the Thursday-to-Saturday period – “ATC capacity/staffing” issues. There was ATC Industrial action in Greece on Wednesday, as part of a national strike.
- “ATC capacity/staffing” (notably in France and Germany) was responsible for 80% of all en-route ATFM delays. The “Others” cause, accounting for 14%, was mainly due to the implementation of airspace restructuring projects (PYXIS and ZEBRA, between Germany and the Netherlands).
- There was 1.4 min of total ATFM delay per flight in Week 15, made up of 1.0 min/flight en-route delay and 0.4 min/flight airport delay. Total ATFM delay was 10% higher than in Week 14.

- France accounted for 46% of all en-route ATFM delays, with Marseille ACC generating 20.2pp of them (3.3pp capacity, 14.6pp staffing, 2.2pp weather), Reims ACC 9.6pp (4.5pp capacity, 2.8pp staffing, 2.3pp other) and Brest ACC 7.4pp (1.6pp capacity, 3.5pp staffing, 2.2pp other).
- Germany accounted for 19% of all en-route ATFM delays, with Karlsruhe UAC accounting for 6.1pp of them (5.3pp capacity, 0.7pp staffing) together with Langen ACC 4.9pp (2.8pp capacity, 2.1pp staffing) and Bremen ACC 4.8pp (0.8pp capacity, 4pp other).
- Spain accounted for 13% of all en-route ATFM delays, with Seville ACC generating 5.6pp (4.2pp capacity, 0.8pp weather) and Barcelona ACC 4.3pp (3.9pp capacity).

En-route ATFM delayed flights per Area Control Centre



- In Week 15 (07 - 13 April), two ACCs recorded en-route ATFM delays higher than 1.0 min/flight.
- Marseille ACC recorded 1.72 min/flight as it was impacted by high demand exceeding available sector capacities. Staffing issues limited sector availability in the Eastern sector group and on Tuesday, there was the activation of a military training.
- Seville ACC recorded 1.06 min/flight: the centre continued to see high demand exceeding the available sector capacities daily (traffic +29% vs 2019 levels). Furthermore, on Wednesday the flight information region (FIR) was protected by a precautionary ATFM flow measure to facilitate a technical intervention on the Air Traffic Management System.
- Bremen ACC recorded 0.99 min/flight due to ongoing capacity reductions of 20% (extended until 21 April) due to unforeseen complexities resulting from the PYXIS and ZEBRA project implementations (related to a major multifaceted airspace restructuring above the Netherlands and northwest Germany). The situation was further complicated by the ongoing military exercise Ramstein Flag '25, with a notable number of transit military flights.
- Reims ACC recorded 0.94 min/flight as the centre faced capacity delays and staffing issues throughout the week.
- Lisbon ACC recorded 0.67 min/flight as it was affected by capacity delays (traffic +14% vs 2019 levels).

Top 10 States

Departures and arrivals

Week 07-13 Apr 2025

See more

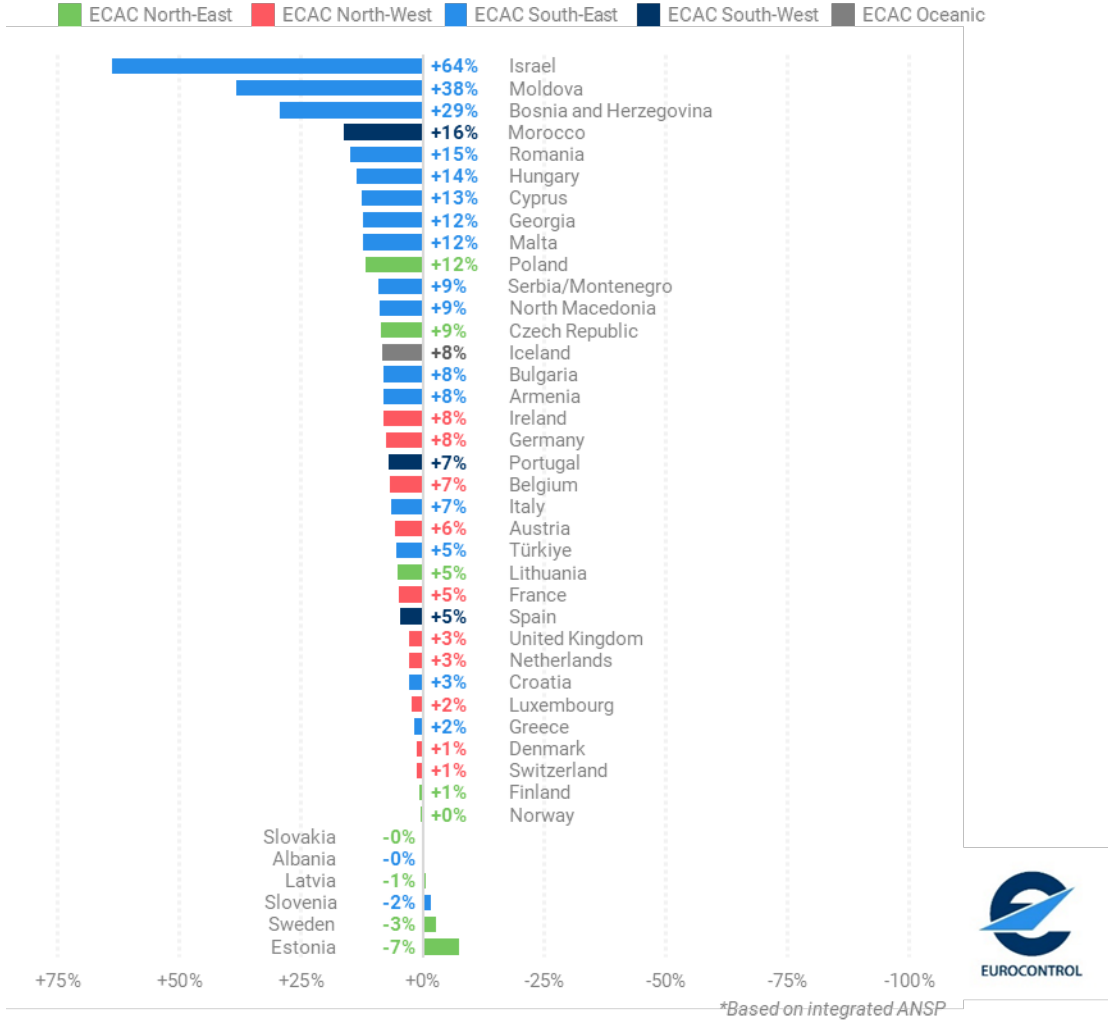
No.	Country	Average daily flights	% prev week	% prev year	% 2019
1.	United Kingdom	5,651	+1%	+3%	-5%
2.	Spain	5,388	+3%	+5%	+13%
3.	Germany	5,234	+6%	+8%	-13%
4.	France	4,436	+4%	+5%	-2%
5.	Italy	4,124	+3%	+7%	+14%
6.	Türkiye	3,054	+0%	+5%	+29%
7.	Netherlands	1,650	+0%	+3%	-4%
8.	Norway	1,368	+1%	+0%	-8%
9.	Portugal	1,337	+3%	+7%	+14%
10.	Switzerland	1,332	+1%	+1%	-3%

- The top 10 States, in aggregate, recorded 2.6% more flights than in the previous week, with all States posting an increase on previous week and on the same week in the previous year.
- Germany recorded the greatest increase (+6%), mainly owing to light operators, Eurowings and SunExpress, on domestic flows as well as on flows Germany «Türkiye and Germany « Spain.
- Four States in the top 10 are recording traffic above 2019 levels (Türkiye, Italy, Spain and Portugal), with the remainder between 2% and 13% below pre-COVID levels.
- Traffic to/from Israel is up +64% vs the same week in April 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 07-13 Apr 2025



Top 10 aircraft operators

Week 07-13 Apr 2025 (avg daily flights)

See more

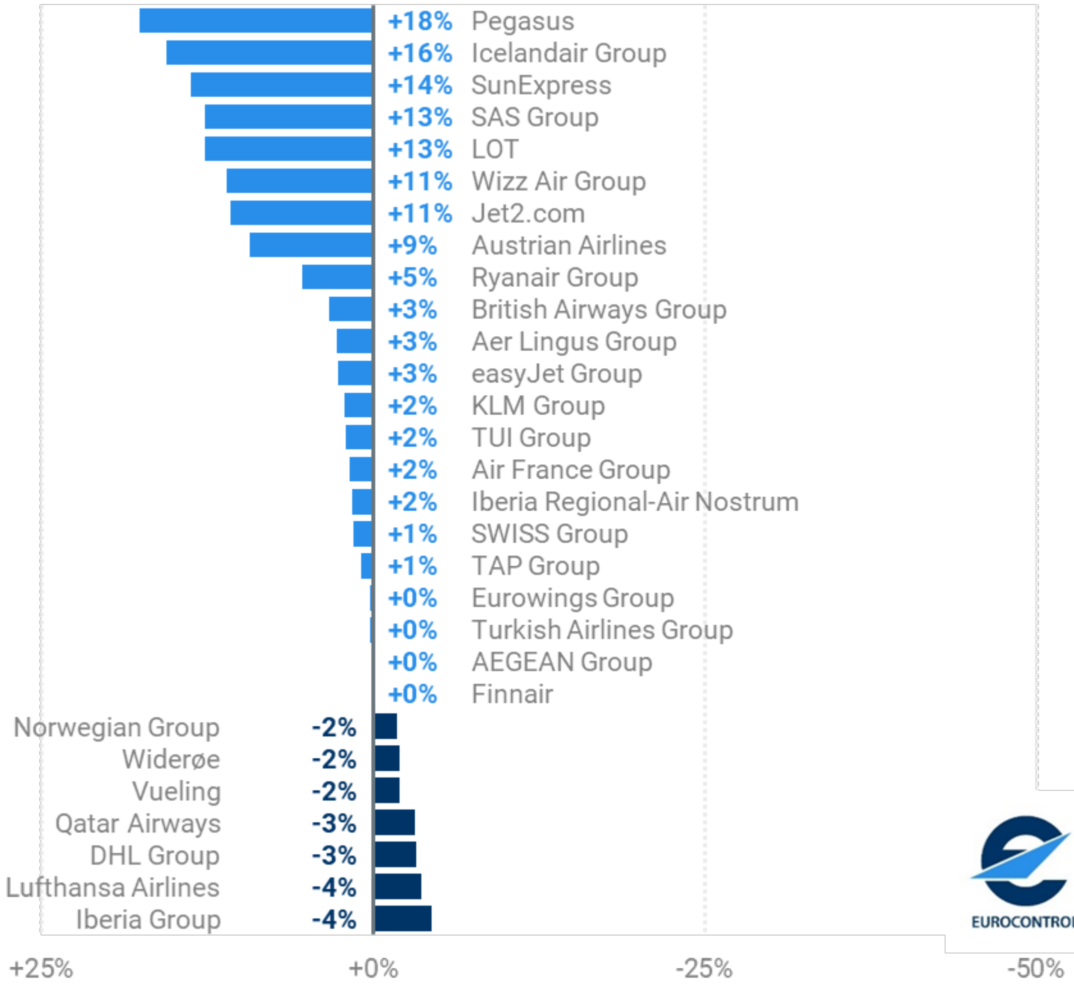
No.	Aircraft operator	Average daily flights	% prev week	% prev year	% 2019
1.	Ryanair Group	3,465	+0%	+5%	+38%
2.	easyJet Group	1,703	+0%	+3%	-5%
3.	Turkish Airlines Group	1,490	-4%	+0%	+29%
4.	Lufthansa Airlines	1,207	+1%	-4%	-25%
5.	Air France Group	1,082	+5%	+2%	-15%
6.	KLM Group	892	+0%	+2%	+3%
7.	Wizz Air Group	881	-1%	+11%	+50%
8.	British Airways Group	851	+0%	+3%	-12%
9.	SAS Group	762	+2%	+13%	-17%
10.	Vueling	630	+3%	-2%	-0%

- The top 10 aircraft operators, in aggregate, recorded slightly more (+0.3%) flights than in the previous week.
- The overall relative stability for the second week of the summer capacities hides disparities: eight of the top 10 aircraft operators recorded more flights than during the previous week.
- Air France Group increased the most (+5%) mainly on France ↔ Italy, France ↔ Greece, France ↔ Spain and domestic France flows.
- Turkish Airlines decreased by 4% (with declines on domestic flows as well as on flows Saudi Arabia ↔ Türkiye).
- Compared with 2024, all the main airlines/airline groups except Lufthansa Airlines and Vueling recorded more flights – with four of the top 10 carriers/groups (Wizz Air, Ryanair, Turkish Airlines and KLM Group) flying more than in 2019.

Aircraft operators in the EUROCONTROL Network

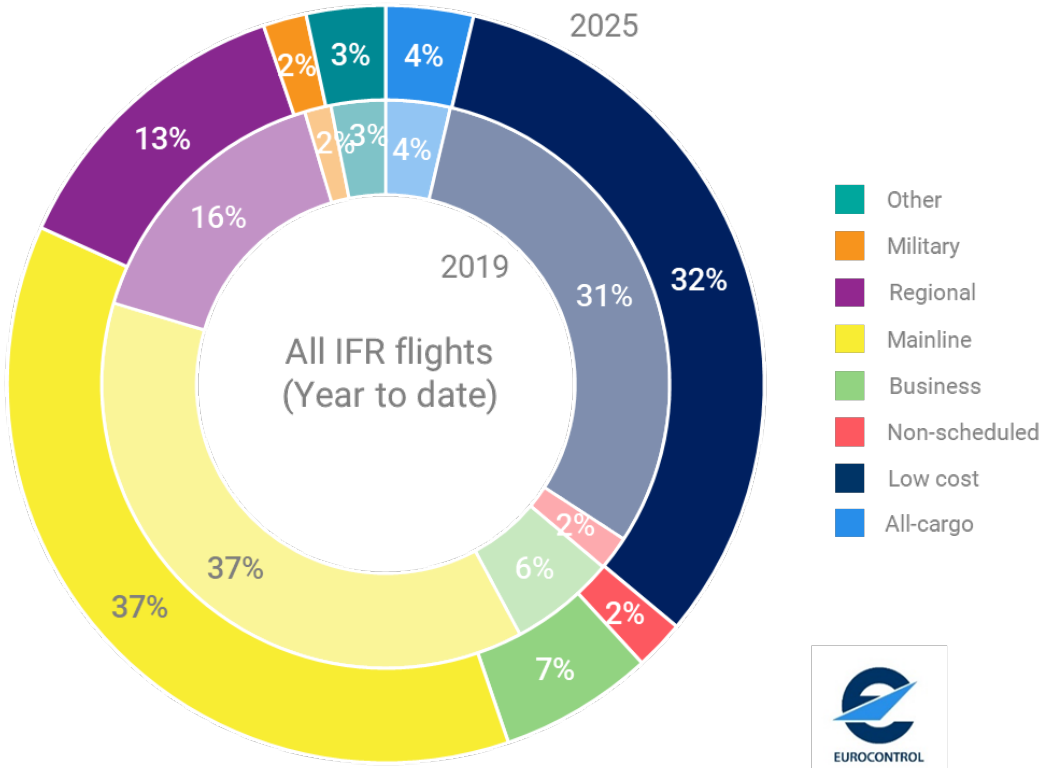
Compared to the equivalent week in 2024

Dep/Arr flights for week 07-13 Apr 2025



Market segments in the EUROCONTROL Network

Average share of total flights (year to date)



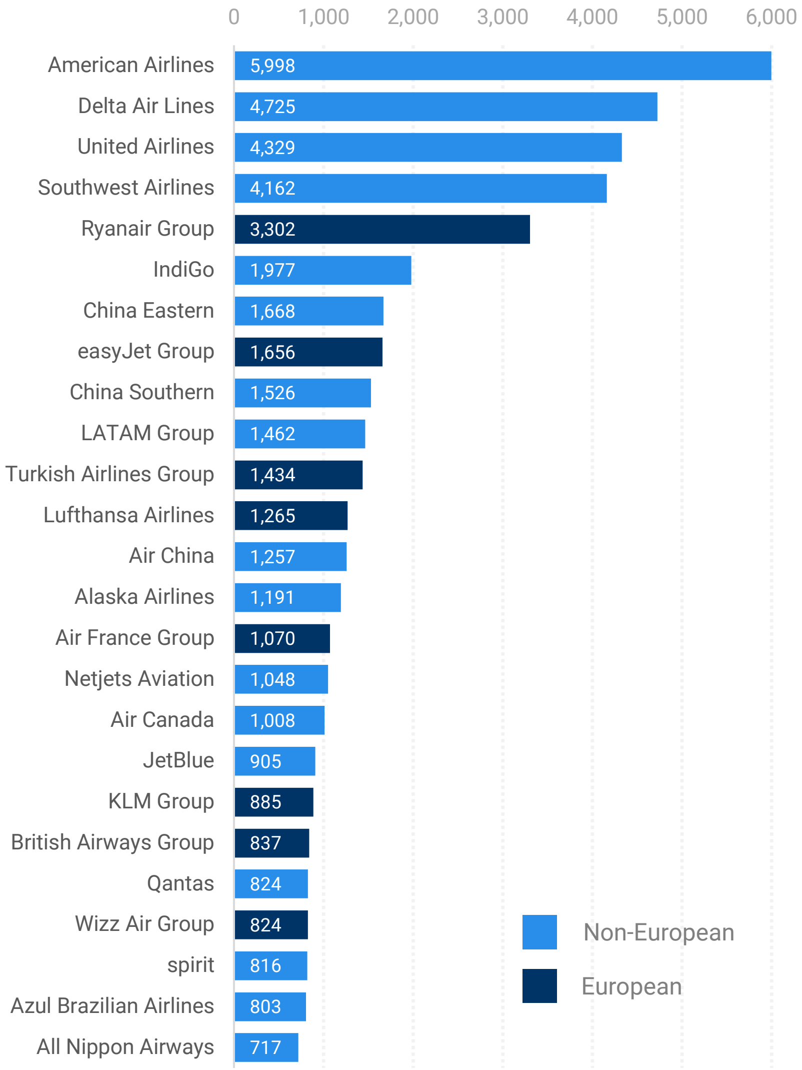
No.	Market segment	Avg. flights	% prev week	% prev year	% 2019
1.	Mainline	10,871	+1%	+5%	-1%
2.	Low Cost	10,653	+3%	+6%	+10%
3.	Regional	3,786	+1%	+0%	-13%
4.	Business	2,014	+9%	+8%	+14%
5.	Other	1,150	+5%	+11%	+28%
6.	All-cargo	1,013	+1%	+2%	+10%
7.	Non-Scheduled	654	+3%	+13%	-17%
8.	Military	570	+3%	+23%	+36%

- For the year-to-date, the largest market segment (Mainline) occupies a 37% share, in line with its share in the same period of 2019. The second-largest segment (Low cost) is at 32%, up by 1pp compared with 2019. The 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 flights shows a positive picture: slight increases for Mainline, Regional and All-Cargo (+1% each), moderate increases for Low Cost and Non-Scheduled (+3% each) and a solid increase for Business Aviation (+9%, owing to dynamic domestic flows in Germany as well as flows Germany ↔ Italy and Germany ↔ Spain).
- Three market segments recorded traffic above 2019 levels: Business Aviation (+14%), All-cargo (+10%), Low Cost (+10%). And three market segments recorded traffic below 2019 levels Mainline, Regional and Non-Scheduled (-1%, -13% and -17% respectively).

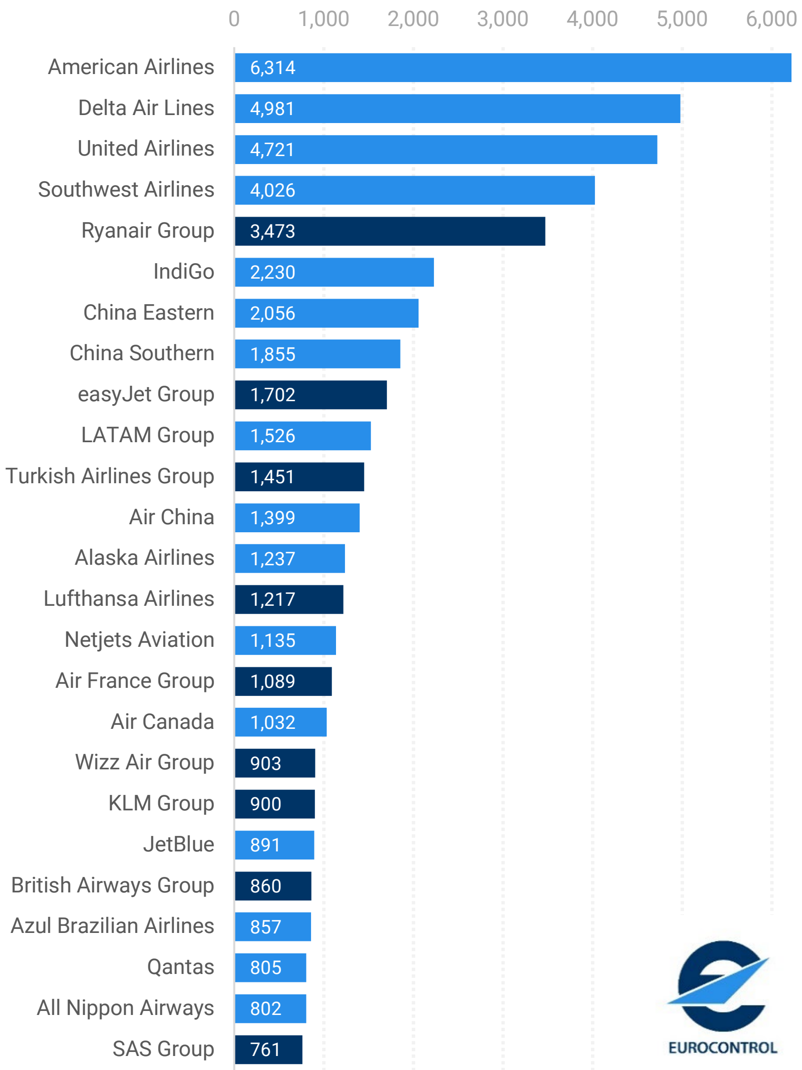
Top 25 global aircraft operators

(average daily departure flights)

7-day average (Week 07-13 Apr 2024)



7-day average (Week 07-13 Apr 2025)



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Source: Flightradar24 Historical Global Utilisation data

- Over the last week, nine European airlines were ranked in the top 25 global aircraft operators – one more carrier (SAS Group) compared 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 9th.
- The top 10 ranking for Week 15 this year is similar to the one last year except China Southern airline which outpaced easyJet.
- Seven more European carriers made the top 25: Turkish Airlines Group (11th), Lufthansa Airlines (14th), Air France Group (16th), Wizz Air Group (18th), KLM Group (19th), British Airways Group (21st) and SAS Group (25th).

Top 10 airports

Airport ranking

Week 07-13 Apr 2025

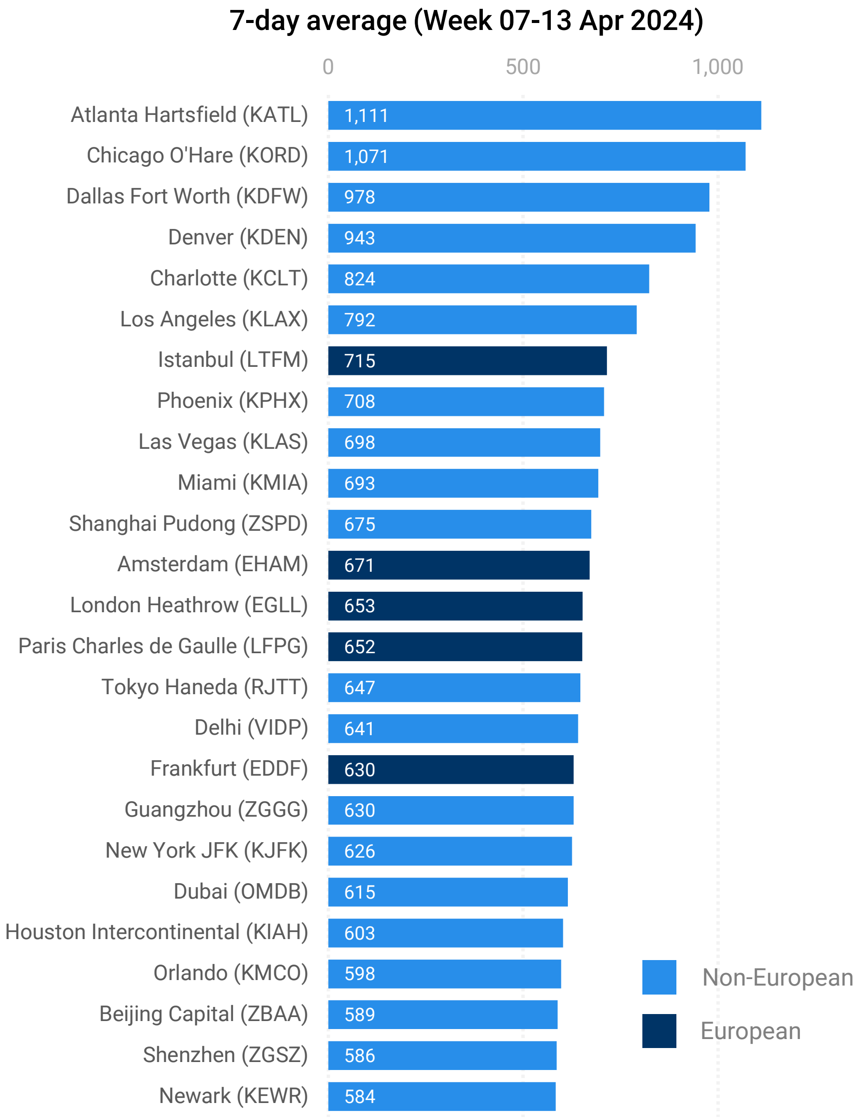
See more

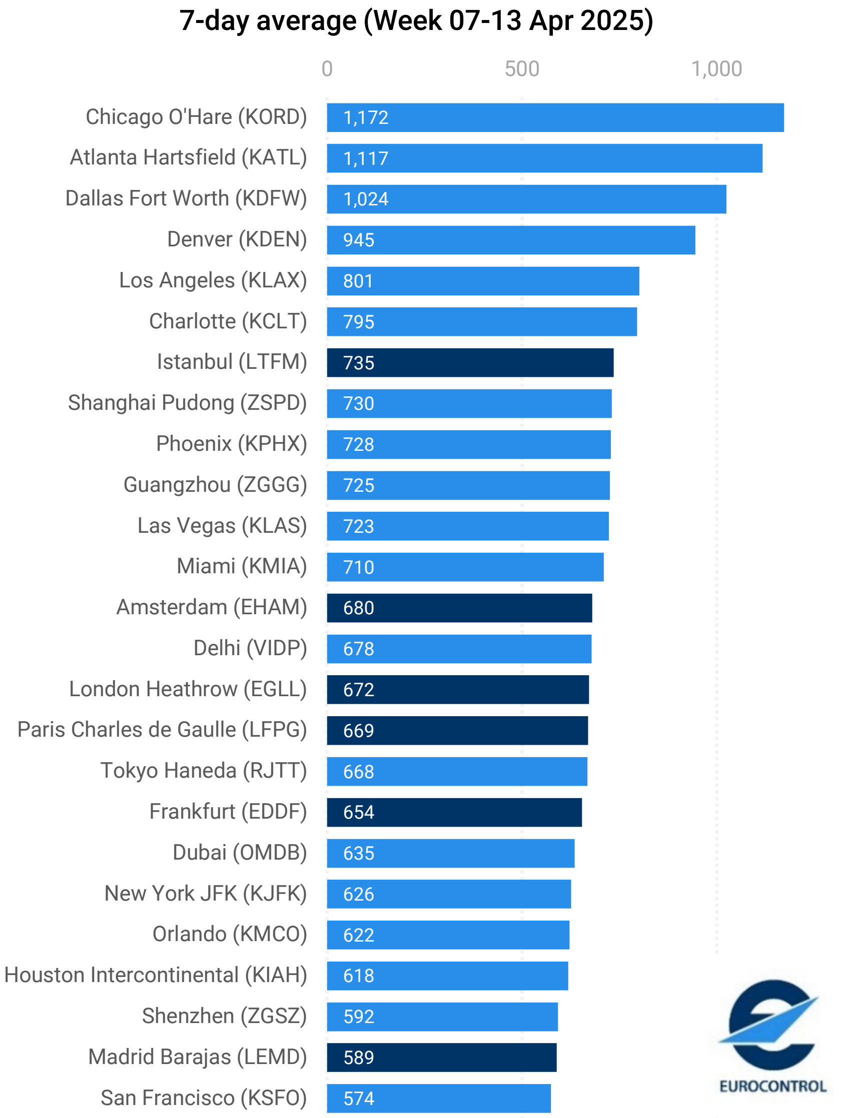
No.	Airport	Avg. daily dep/arr flights	% prev week	% prev year	% 2019
1.	Istanbul	1,464	-3%	+2%	n/a
2.	Amsterdam	1,361	+0%	+1%	-4%
3.	London Heathrow	1,344	+1%	+3%	-1%
4.	Paris Charles de Gaulle	1,341	+2%	+3%	-6%
5.	Frankfurt	1,309	+2%	+4%	-12%
6.	Madrid Barajas	1,178	+1%	+1%	+0%
7.	Barcelona	1,033	+1%	+3%	+4%
8.	Munich	978	+5%	+7%	-18%
9.	Rome Fiumicino	936	+2%	+5%	+6%
10.	Zurich	746	+4%	+3%	-2%

- Compared with the last edition, there were some changes in the top 10: London Heathrow came back to the 3rd place (it was ranked 6th during week 12 as the airport closed for several hours owing to a power outage).
- Istanbul (1,464 flights per day, -3% vs the previous week), followed by Amsterdam (1,361, +0.1%) and London Heathrow (1,344, +0.6%) are the busiest airports.
- All of Week 10's top airports recorded more flights than in the same week in 2024, with the highest growth at Munich and Rome Fiumicino (+7% and +5% respectively).
- Only 3 top 10 airports (Rome, Barcelona and Madrid) 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)





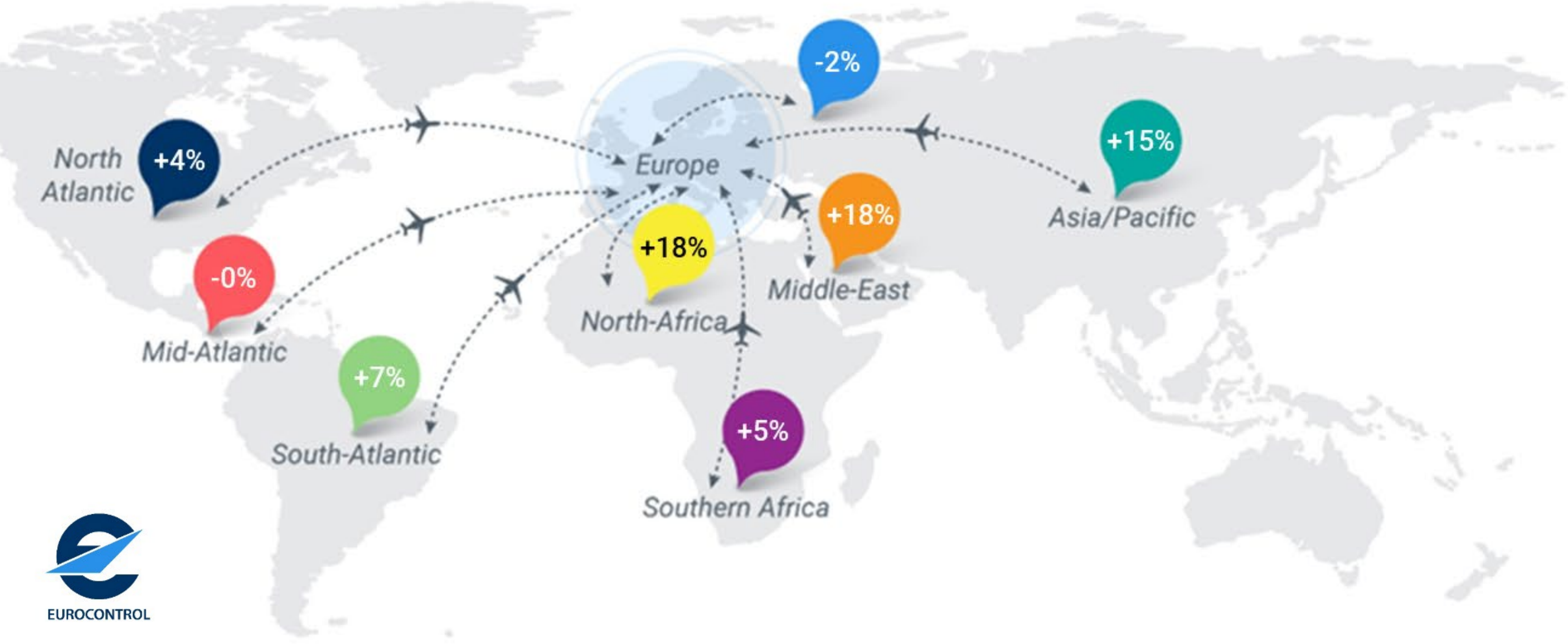
Source: Flightradar24 Historical Global Utilisation data

- Over the last week, six European airports made the top 25 in terms of global airport departures (one more than in the corresponding week in 2024: Madrid entered the top 25 in 2025).
- There are three European airports in the top 15: Istanbul (7th), Amsterdam Schiphol (13th) and London Heathrow (15th). The latter two airports have moved down in the ranking compared to the same week last year.
- The other European airports in the top 25 are Paris CDG (16th), Frankfurt (18th) and Madrid (24th).
- The top 10 global airport ranking is dominated by US airports, with the exceptions being Istanbul, Shanghai Pudong (8th) and Guangzhou (10th).

Traffic flows

(average daily departure/arrival flights for week 07-13 Apr 2025)

Region	Average daily flights	% prev week	% prev year	% 2019
Intra-Europe	23,634	+3%	+3%	-1%
Europe ↔ Middle-East	1,557	-3%	+18%	+14%
Europe ↔ North-Africa	1,393	+5%	+18%	+33%
Europe ↔ North Atlantic	1,344	+2%	+4%	+16%
Europe ↔ Asia/Pacific	940	+1%	+15%	+19%
Europe ↔ Southern Africa	298	-2%	+5%	-1%
Europe ↔ Other Europe	266	+0%	-2%	-70%
Europe ↔ South-Atlantic	196	+0%	+7%	+10%
Europe ↔ Mid-Atlantic	183	+1%	-0%	+2%
Non Intra-Europe	6,176	+1%	+12%	+5%



- The main intra-European traffic flow recorded 23,634 daily flights last week, 3% higher than the previous week. Intercontinental flows amounted to 6,176 daily flights on average, 1% higher than the previous week.
- The second-largest flow is with the Middle East, with 1,557 flights per day (-3% compared with the previous week owing to decreases in the Saudi Arabia ↔ Türkiye and Iran ↔ Türkiye flows). The flow is recording traffic 18% above the same week in 2024 and +14% vs 2019 levels.
- The third-largest flow is with North Africa, with 1,393 average daily flights (+5% compared with the previous week, owing mainly to increases on the France ↔ Morocco, France ↔ Tunisia and the Egypt ↔ Italy flows).
- The fourth-largest flow is with North America, with 1,344 daily flights (+2%, owing to increases on flows between the US and Italy, Iceland and France).
- The flow between Europe and the Asia/Pacific region (940 flights per day, +1% owing to increases on Kazakhstan ↔ Türkiye and China ↔ Türkiye) shows traffic +15% vs the same week in 2024, and +19% compared with 2019 levels.
- The flow to 'Other Europe' (including the Russian Federation) remains massively reduced at -70% compared with 2019.

Top 10 long-haul country pairs

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

Week 07-13 Apr 2025

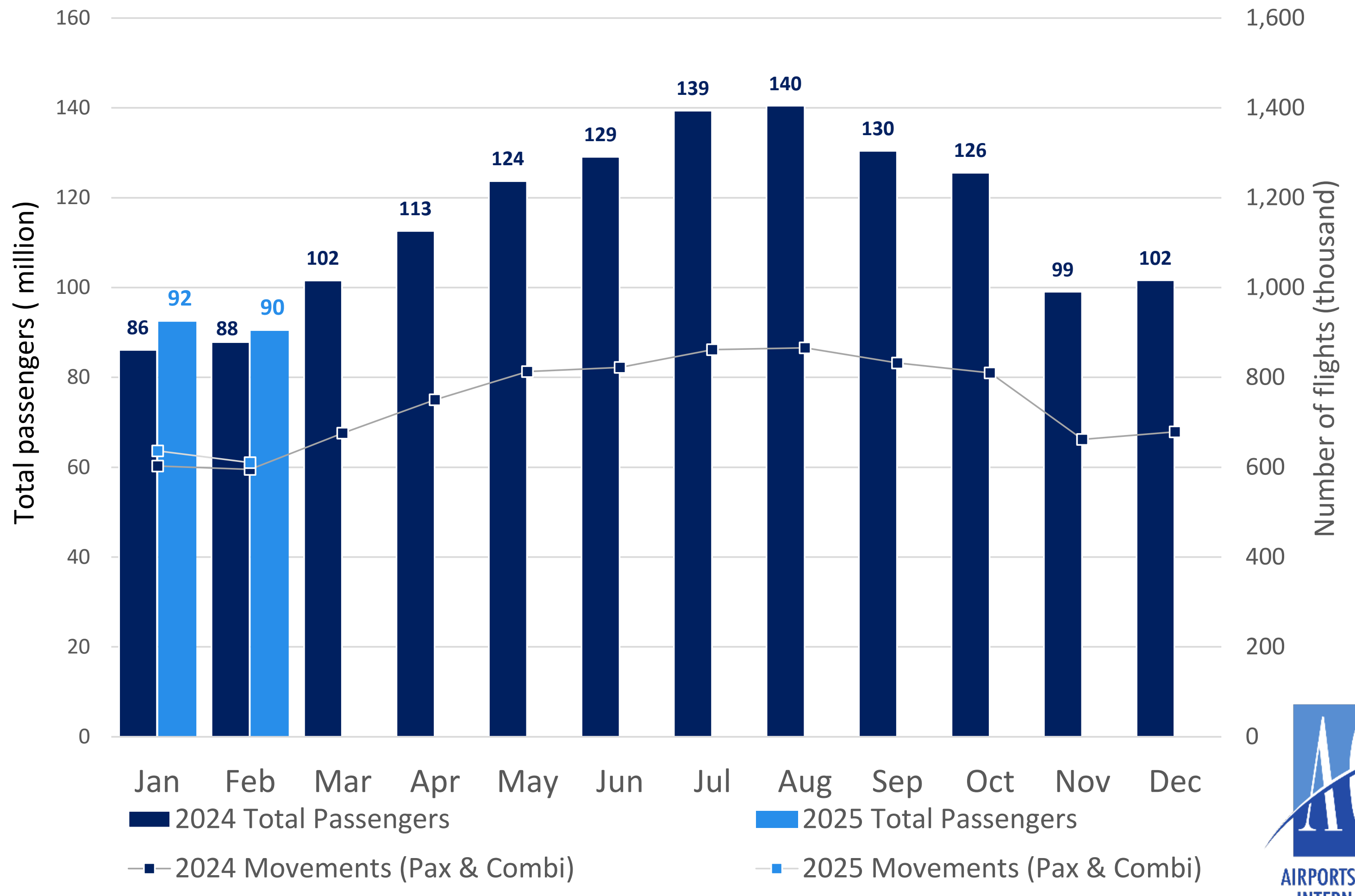
No.	Country pair	Average daily flights	% prev week	% prev year	% 2019
1.	UK ↔ US	301	-0%	-3%	-3%
2.	Germany ↔ US	167	+1%	+9%	+6%
3.	France ↔ US	123	+2%	+2%	+13%
4.	Italy ↔ US	85	+7%	+4%	+41%
5.	Netherlands ↔ US	82	+0%	+3%	+1%
6.	Ireland ↔ US	71	+4%	+12%	+23%
7.	Spain ↔ US	70	+1%	+1%	+12%
8.	UAE ↔ UK	64	+2%	+8%	-2%
9.	Egypt ↔ Russia	51	+4%	+40%	n/a
10.	Russia ↔ UAE	47	-2%	+12%	+1271%

- The top 7 long-haul country pairs are all 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, Egypt ↔ Russia and Russia ↔ UAE.
- All but two long-haul flows posted increases on the previous week with main increases on Italy ↔ US and Ireland ↔ US as well as Egypt ↔ Russia. Decreases were recorded on flows: UK ↔ US (-0.2%) and Russia ↔ UAE (-2%).
- All but one of the top long-haul flows recorded more traffic vs 2024 with double-digit increases on four of them: Egypt ↔ Russia, Ireland ↔ US and Russia ↔ UAE.
- Seven flows are currently above 2019 levels, notably Russia ↔ UAE (+1,271%), Italy ↔ US (+41%) and Ireland ↔ US (+23%).

Top 40 European airports: passengers

2025

Passengers and flights at ECAC top 40 Airports



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

- The **number** of **passengers*** was **90 million in February 2025, +2.8%** more than in February **2024**, while the number of corresponding flights amounted to 610 thousands, a +2.5% increase on February 2024. The respective **recovery** rates **on 2019** levels were **105%** in **passenger numbers** and 95% for flight movements. *Note that the comparison with February 2024 is slightly distorted by the leap year effect.*

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

Economics

Week 03-09 Mar 2025

04 Apr 2025
avg fuel price:

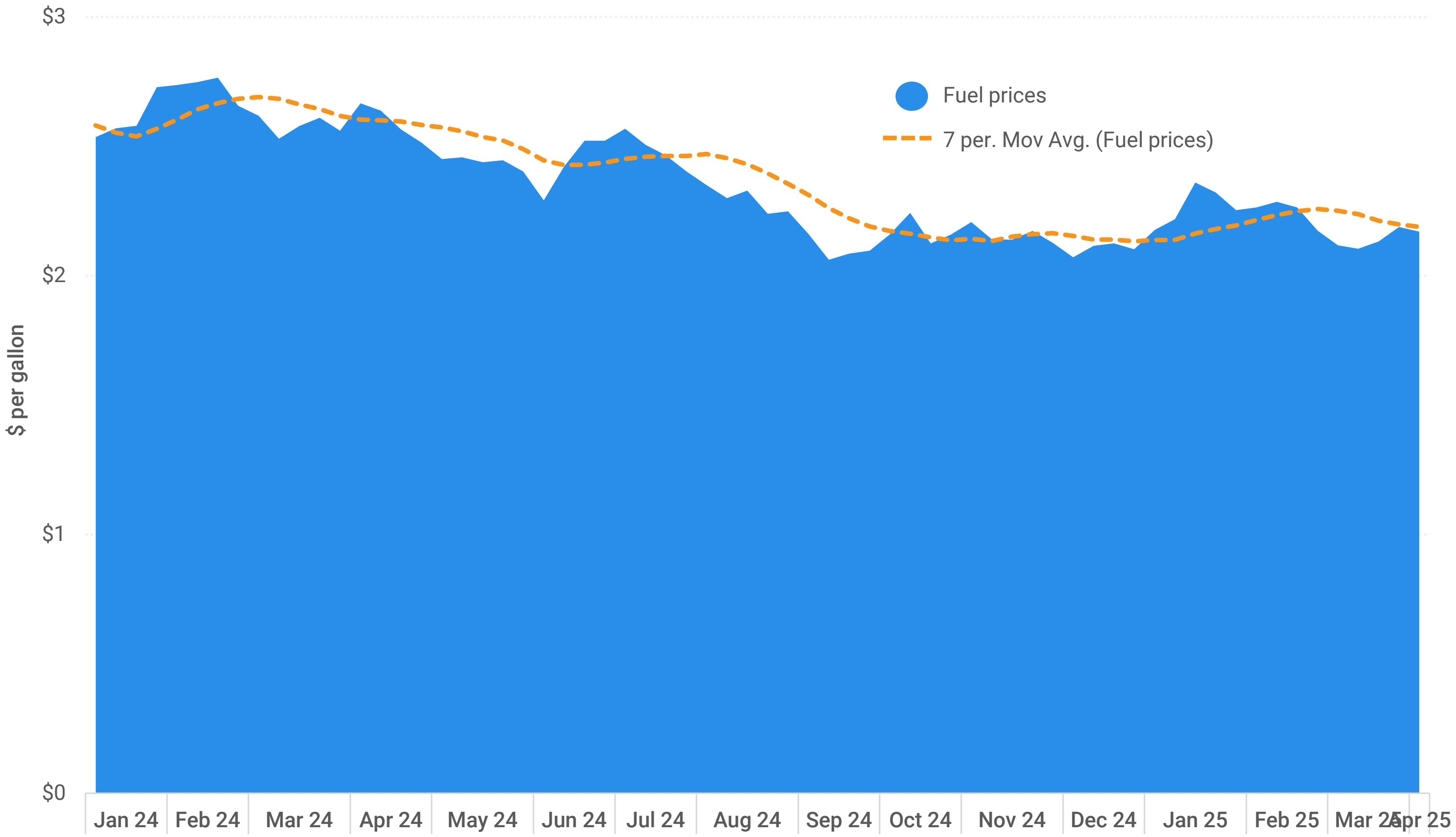
$2.17 /gallon

2%

vs. $2.13 /gallon
on 21 Mar 2025

Source: IATA/Platts

Jet fuel price (Europe)

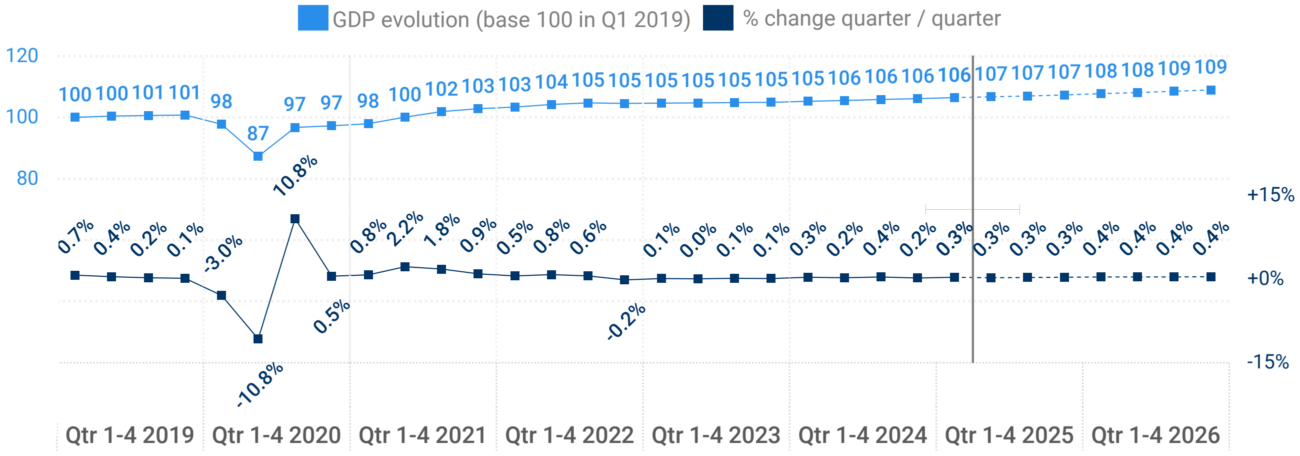


Source: IATA/Platts

- The average price of jet fuel closed at 2.17 USD/gallon on 04 April 2025, 2% higher 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

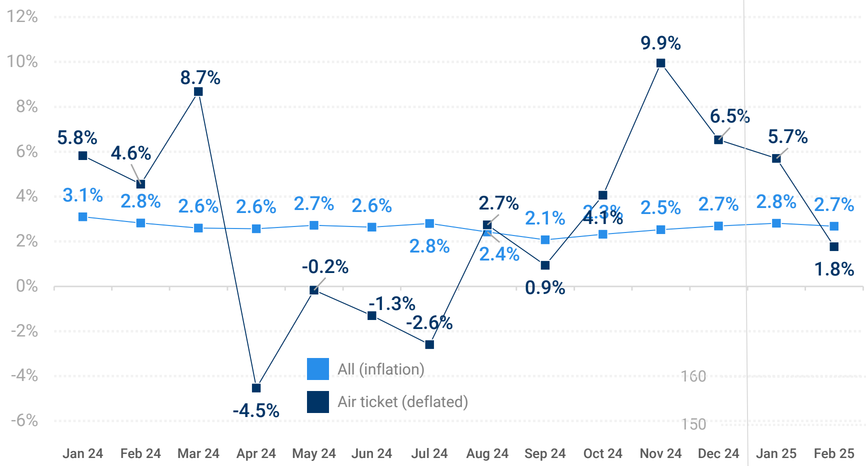


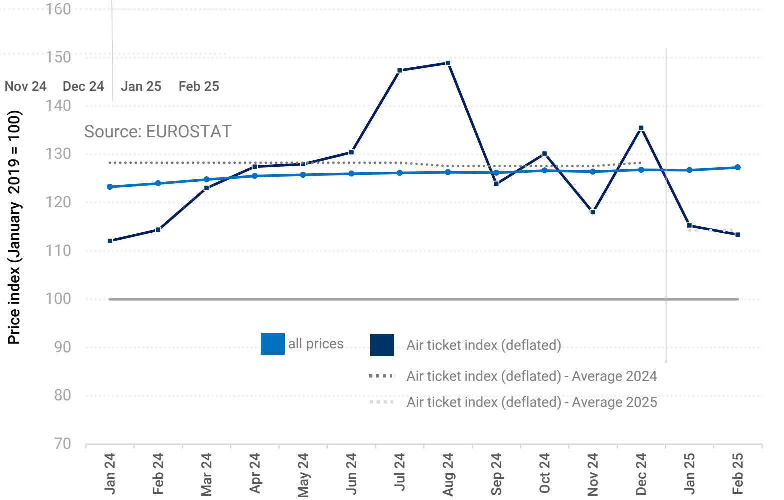
Source: Oxford Economics Ltd.
Last Update: Mar. 2025

- According to the **latest GDP forecast from Oxford Economics**, the EU27 economies posted a **weak** but **positive** growth during **Q4 2024** (+0.3% vs Q3 2024). **Overall**, the **EU27** recorded a **+0.86% 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. However, forecasts will be revised soon to include the likely imposition of tariffs on US imports.

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 February **2025** was **2.7% higher than** in February**2024**.
- **Air ticket prices** were **higher (1.8%), in real terms for February 2025** compared to the same month in 2024.

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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