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EUROPEAN AVIATION OVERVIEW

21-27 Apr 2025

Wednesday 30 April 2025

Headlines

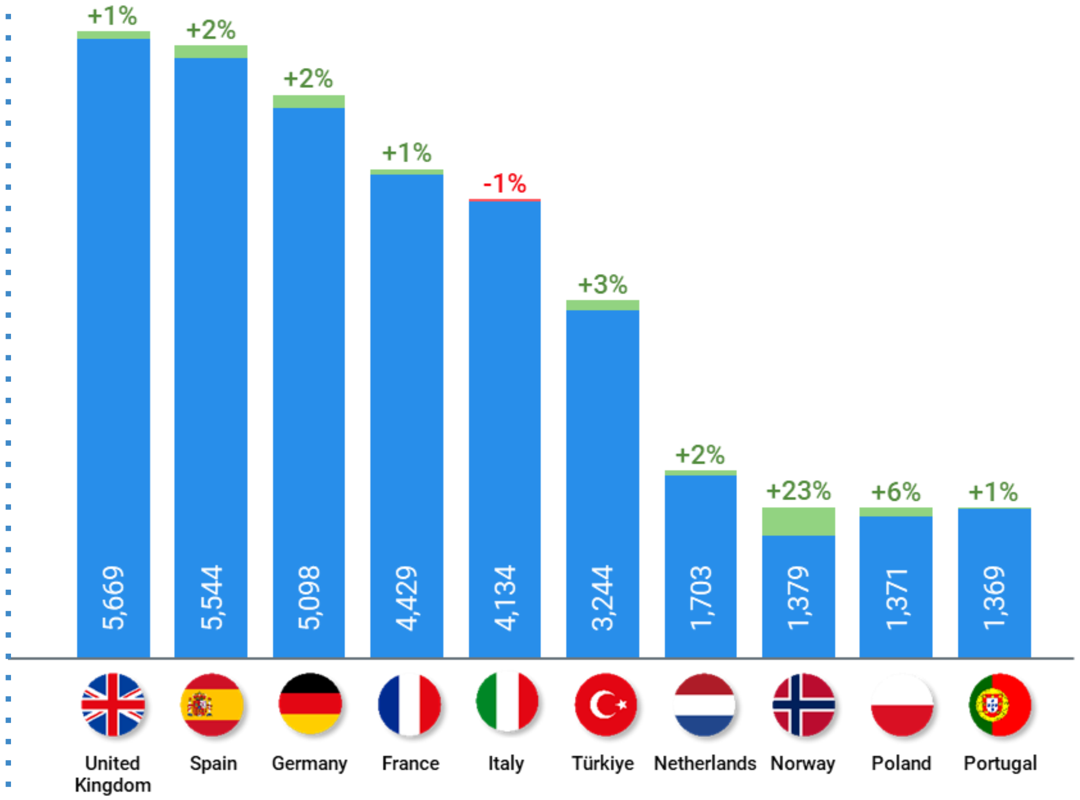
(Week 21-27 Apr 2025)

- The network recorded 31,068 average daily flights in week 17 (+6% vs 2024), above the 2019 level (102%).
- Overall, traffic in week 17 was 2.8% up on week 16 (Easter in most European States).
- On average, the top 10 carriers increased their capacities by 1.3% compared to the previous week. Meanwhile, at country level, the top 10 states saw their flights increasing by 2.4%.
- Year-to-date traffic is 97% of 2019, 5% more than 2024.
- En-route ATFM delays were in line (+1%) with those of the previous week, with a daily average of just below 32,600 minutes. They were 47% higher than in 2024 and accounted for, on average, 1.05 min/flight.
- ‘ATC capacity/staffing’ was the top delay cause last week (69% of all en-route ATFM delays), followed by ‘Weather’ (22%).
- The average jet fuel price was at 2.02 USD/gallon on 18 April, a 7% drop on two weeks earlier.
- EUROCONTROL billed 863M€ in en-route charges in March 2025, 19% above the amount billed for March 2024 flights, reflecting more service units (+6%) and higher unit rates (+11%). The average distance per flight increased (+1.2% in March 2025 vs March 2024) while the average weight per flight was relatively stable (+0.4%).

Top 10 busiest States

On week 21-27 Apr 2025

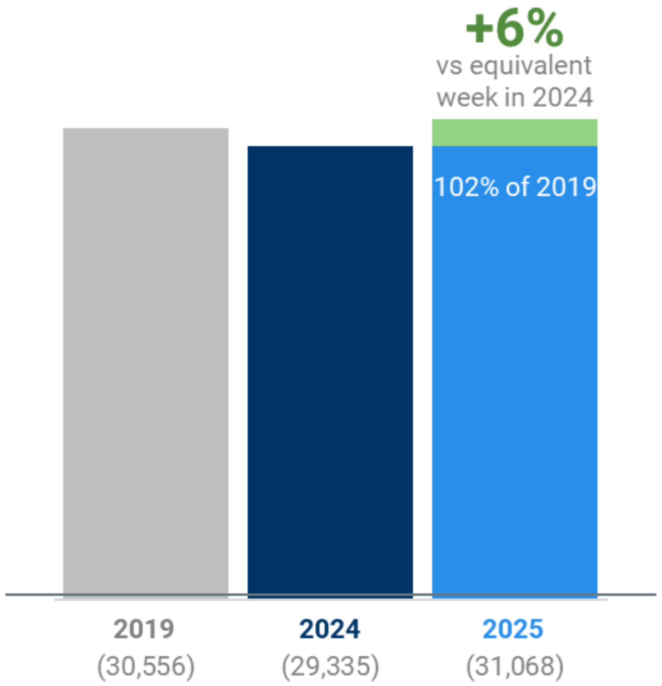
(all flights excl. overflights compared with previous week)



Traffic situation

Average daily flights (including overflights)

Week 21-27 Apr 2025

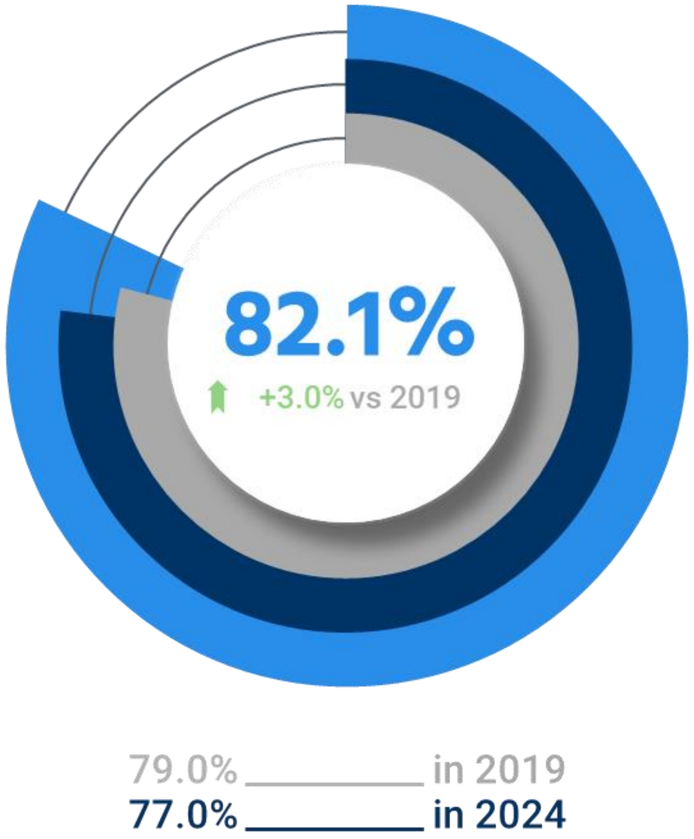


Arrival & departure punctuality

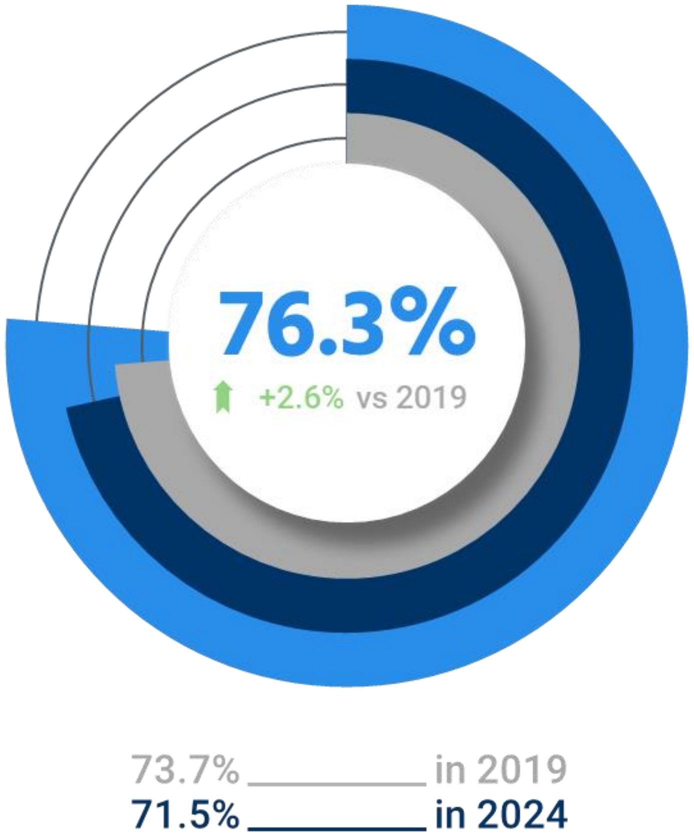
(all network scheduled flights)

Week 21-27 Apr 2025

ARRIVAL PUNCTUALITY



DEPARTURE PUNCTUALITY



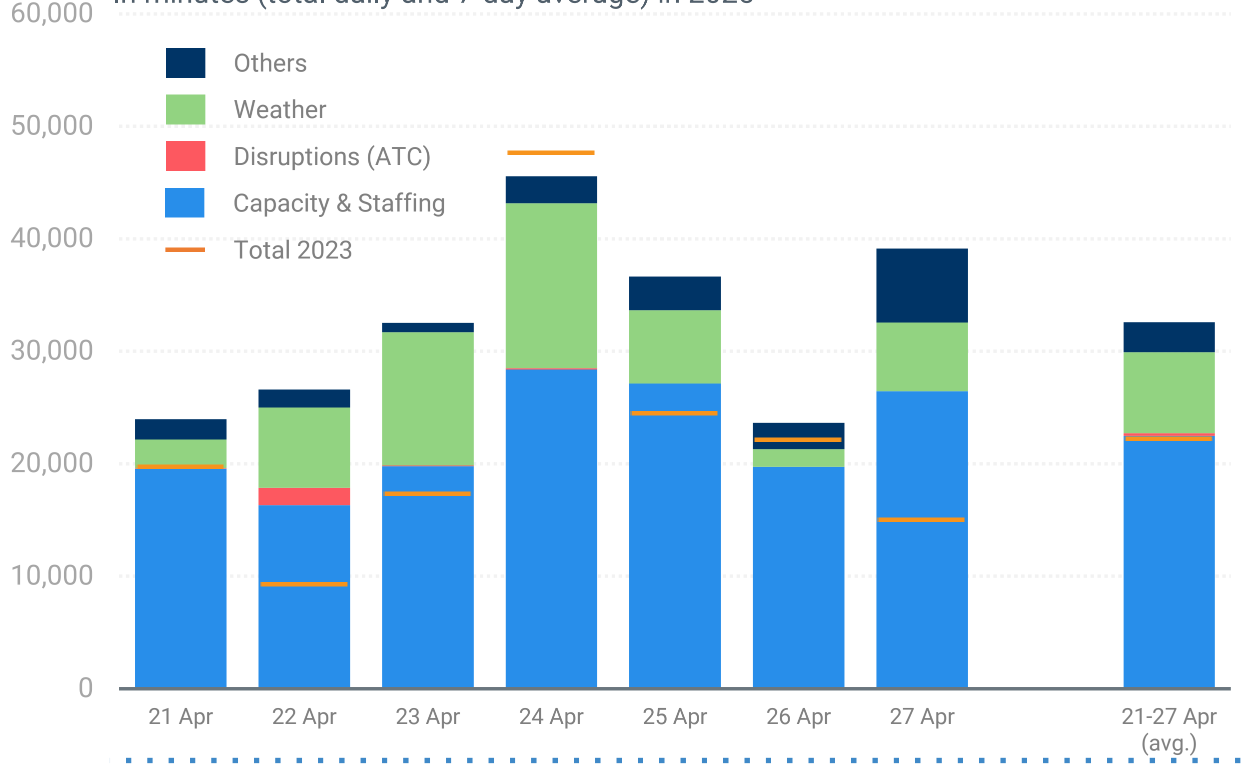
The pictures show the share of flights arriving/departing no later than 15 minutes after/before the scheduled time (OTP15).

- Network punctuality improved when compared to the equivalent week in 2024. Arrival punctuality increased by 5.1 percentage points to 82.1%, and departure punctuality increased by 4.8 percentage points to 76.3%. Compared to the same week in 2019, both arrival and departure punctuality are better (respectively +3.0pp and +2.6pp).
- Athens airport continued to experience daily ATFM regulations: ATC aerodrome capacity was still at its winter rate, despite the IATA summer season commencing at the end of March.
- Tel Aviv experienced aerodrome capacity and ATC capacity regulations throughout the week with 21 April seeing high delays (night curfew issues).
- Nice saw regulations during the week (ATC staffing, aerodrome capacity and ATC capacity reasons) with 27 April seeing the highest delays.
- Amsterdam Schiphol continued to suffer from daily aerodrome capacity regulations, as well as weather issues (Low Visibility Procedure and rain).
- Zurich saw delays due to weather regulations as north easterly winds saw non-optimal runway configurations on multiple days; 26 April saw the highest delays for the week.

En-route ATFM delays

Delays per cause (EUROCONTROL Area)

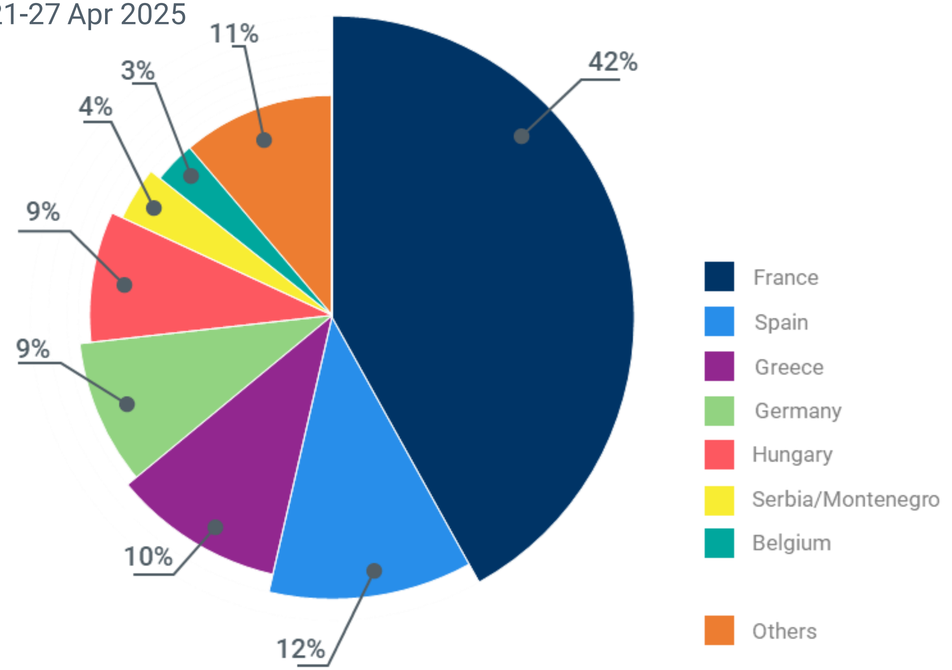
In minutes (total daily and 7-day average) in 2025



- Week 17 (21 – 28 Apr) registered similar en-route ATFM delays compared to Week 16 (+1%), with an average of 32,583 daily minutes – 47% higher than for the same operational week of 2024.
- "ATC capacity/staffing" was responsible for 69% of all en-route ATFM delays (notably in France and Greece). The "Weather" cause, accounting for 22%, was mainly due to heavy convective weather (especially flooding) experienced in central Europe (e.g. Hungary, Romania), predominantly on Wednesday and Thursday.
- There was 1.5 min of total ATFM delay per flight in week 17, made up of 1.0 min/flight en-route delay and 0.5 min/flight airport delay. Total ATFM delay was 7% lower than in week 16.

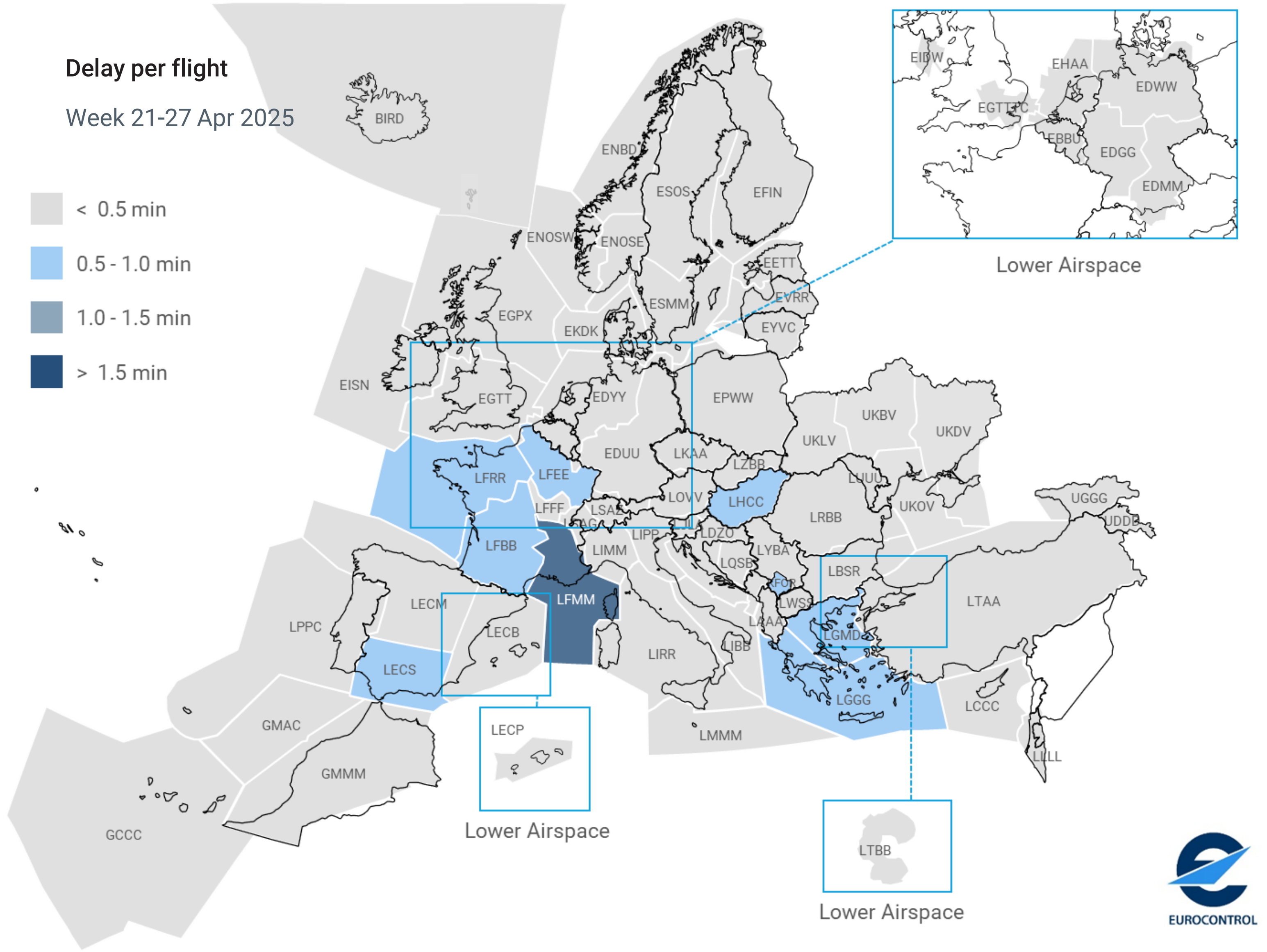
Share of en-route ATFM delays

Week 21-27 Apr 2025



- France accounted for 42% of all en-route ATFM delays, with notably Marseille ACC generating 20.8pp of them (8.7pp capacity, 10.0pp staffing, 1.6pp weather), Bordeaux ACC 7.0pp (0.7pp capacity, 1.8pp staffing, 4.5pp other) and Reims ACC 5.4pp (2.4pp capacity, 2.7pp staffing).
- Spain accounted for 12% of all en-route ATFM delays, mainly with Barcelona ACC accounting for 4.9pp of them (3.6pp capacity, 1.3pp weather) together with Seville ACC 4.0pp (3.7pp capacity) and Madrid ACC 2.8pp (capacity).
- Greece accounted for 10% of all en-route ATFM delays, with Athens ACC generating 5.3pp (5.0pp staffing) and Makedonia ACC 5.1pp (staffing).

En-route ATFM delayed flights per Area Control Centre



- In week 17 (21 - 27 April), only one ACC recorded en-route ATFM delays higher than 1.0 min/flight.
- Marseille ACC recorded 1.85 min/flight as demand exceeded the available sector capacities, with staffing issues and (slight) weather issues causing delays.
- Makedonia ACC recorded 0.92 min/flight: the centre faced staffing issues throughout the week (traffic +33% vs 2019 levels).
- Budapest ACC recorded 0.90 min/flight mostly due to weather delays from Tuesday to Friday.
- Athens ACC recorded 0.81 min/flight as the centre continued to experience staffing issues (traffic +32% vs 2019 levels).
- Bordeaux ACC recorded 0.78 min/flight as it encountered capacity delays from Friday to Sunday and staffing issues throughout the week.

Top 10 States

Departures and arrivals

Week 21-27 Apr 2025

See more

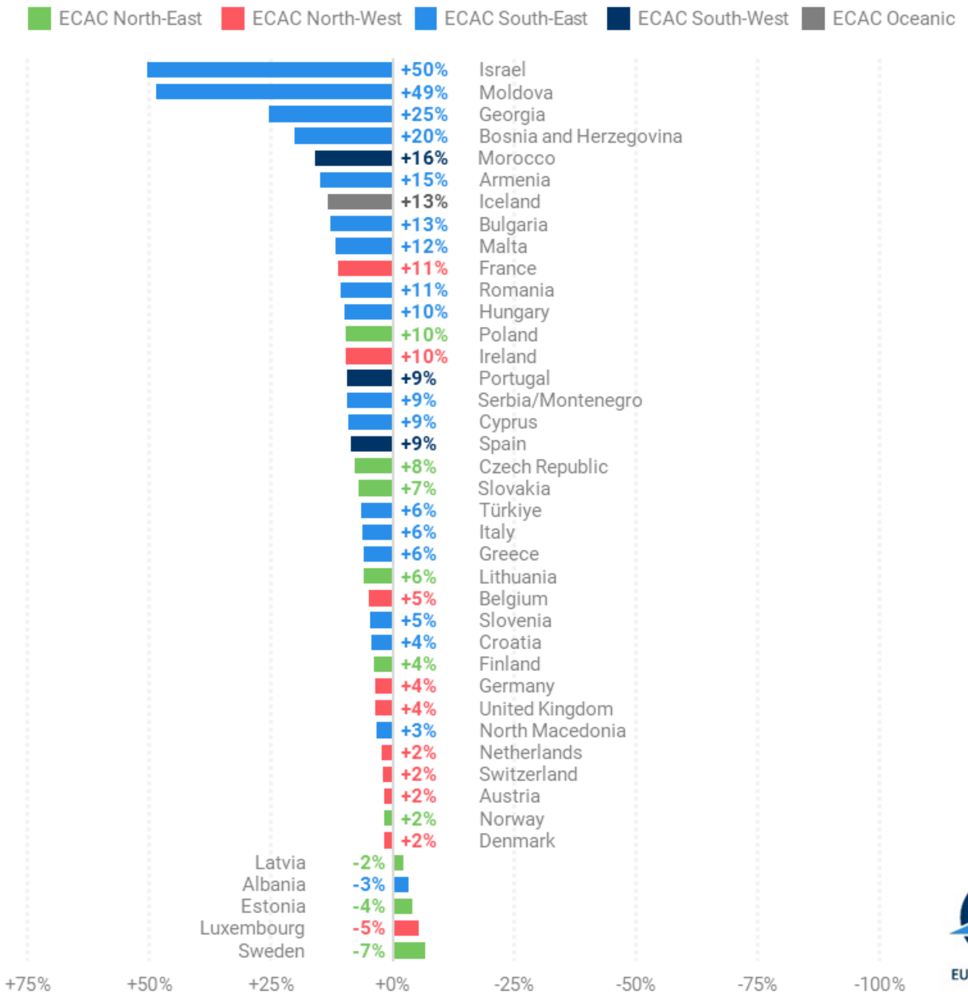
No.	Country	Average daily flights	% prev week	% prev year	% 2019
1.	United Kingdom	5,669	+1%	+4%	-3%
2.	Spain	5,544	+2%	+9%	+14%
3.	Germany	5,098	+2%	+4%	-10%
4.	France	4,429	+1%	+11%	-2%
5.	Italy	4,134	-1%	+6%	+14%
6.	Türkiye	3,244	+3%	+6%	+15%
7.	Netherlands	1,703	+2%	+2%	-3%
8.	Norway	1,379	+23%	+2%	+3%
9.	Poland	1,371	+6%	+10%	+22%
10.	Portugal	1,369	+1%	+9%	+16%

- The top 10 States, in aggregate, recorded 2.4% more flights than in the previous week, with all States posting an increase on previous week (except Italy) and on the same week in the previous year.
- Norway recorded the greatest increase (+23%), a recovery from the Easter break the week before: many of the Scandinavian airlines had a subdued schedule (very low domestic traffic). Italy recorded a slight decline (-1%) owing to decreases on domestic flows especially for Italian Air Force and DHL Group.
- Six States in the top 10 are recording traffic above 2019 levels (Poland, Portugal, Türkiye, Italy, Spain and Norway), with the remainder between 2% and 10% below pre-COVID levels.
- Traffic to/from Israel is up +50% vs the same week in April 2024, reflecting the impact then of the conflict with Hamas. Nearly 90% of the States are recording number of flights above last year's levels.

States in the EUROCONTROL Network

Compared to the equivalent week in 2024

Dep/Arr flights for week 21-27 Apr 2025



*Based on integrated ANSP

Top 10 aircraft operators

Week 21-27 Apr 2025 (avg daily flights)

See more

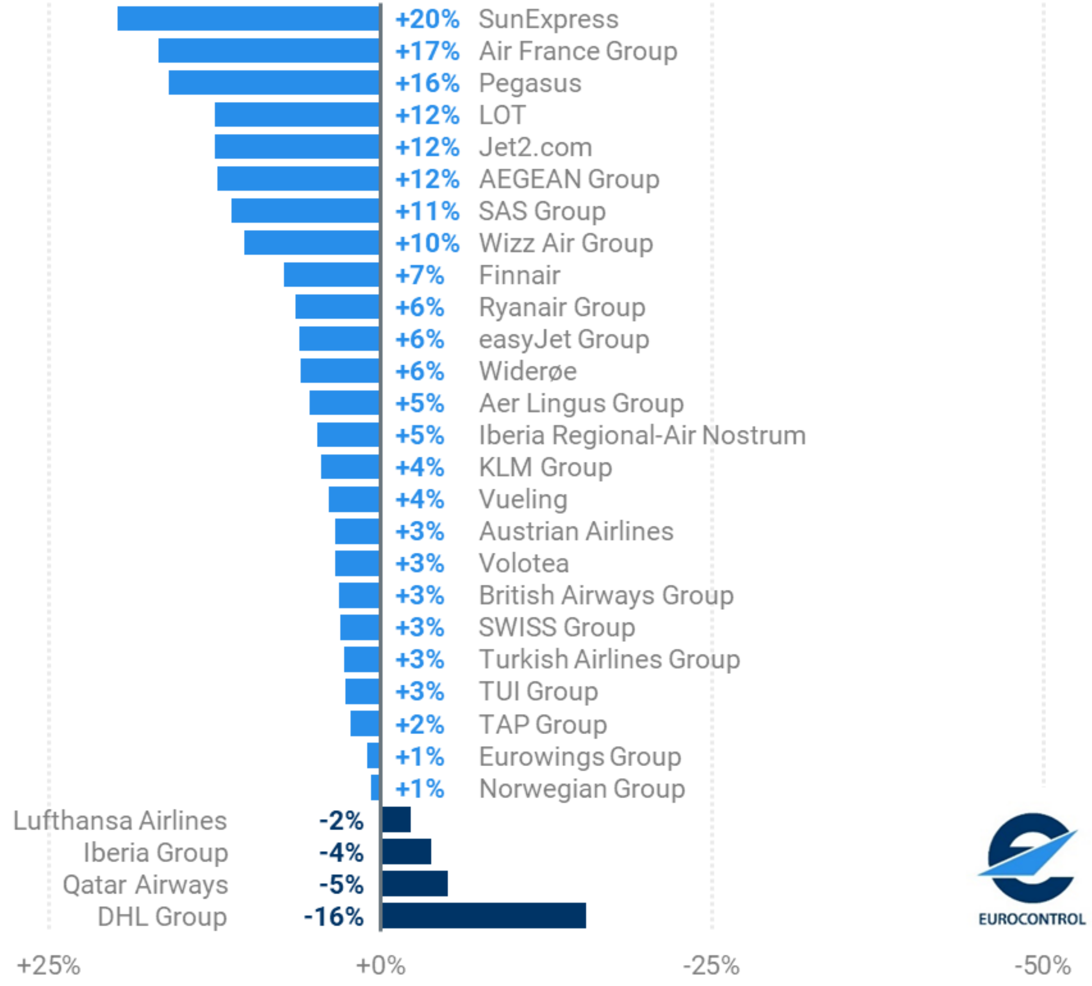
No.	Aircraft operator	Average daily flights	% prev week	% prev year	% 2019
1.	Ryanair Group	3,501	+0%	+6%	+39%
2.	easyJet Group	1,731	-0%	+6%	-4%
3.	Turkish Airlines Group	1,499	+1%	+3%	+11%
4.	Lufthansa Airlines	1,205	+1%	-2%	-20%
5.	Air France Group	1,126	+0%	+17%	-11%
6.	KLM Group	947	+3%	+4%	+2%
7.	Wizz Air Group	892	+0%	+10%	+41%
8.	British Airways Group	852	-0%	+3%	-9%
9.	SAS Group	744	+14%	+11%	+12%
10.	Vueling	653	+2%	+4%	-1%

- The top 10 aircraft operators, in aggregate, recorded slightly more (+1.3%) flights than in the previous week.
- Half of the aircraft operators in this top 10 recorded a relative stability in their capacities from one week to another.
- SAS Group increased the most (+14% on previous week, due to a rebound on quiet Easter week 16 in Nordic States), mainly on domestic Norway, domestic Sweden and Germany ↔ Denmark flows.
- KLM Group posted a 3% increase especially on flows from and to Easter holidays destinations (Netherlands ↔ Greece and Netherlands ↔ Spain).
- Compared with 2024, all the main airlines/airline groups except Lufthansa Airlines recorded more flights – and five of the top 10 carriers/groups (Wizz Air, Ryanair, SAS Group, Turkish Airlines and KLM Group) flew more than in 2019.

Aircraft operators in the EUROCONTROL Network

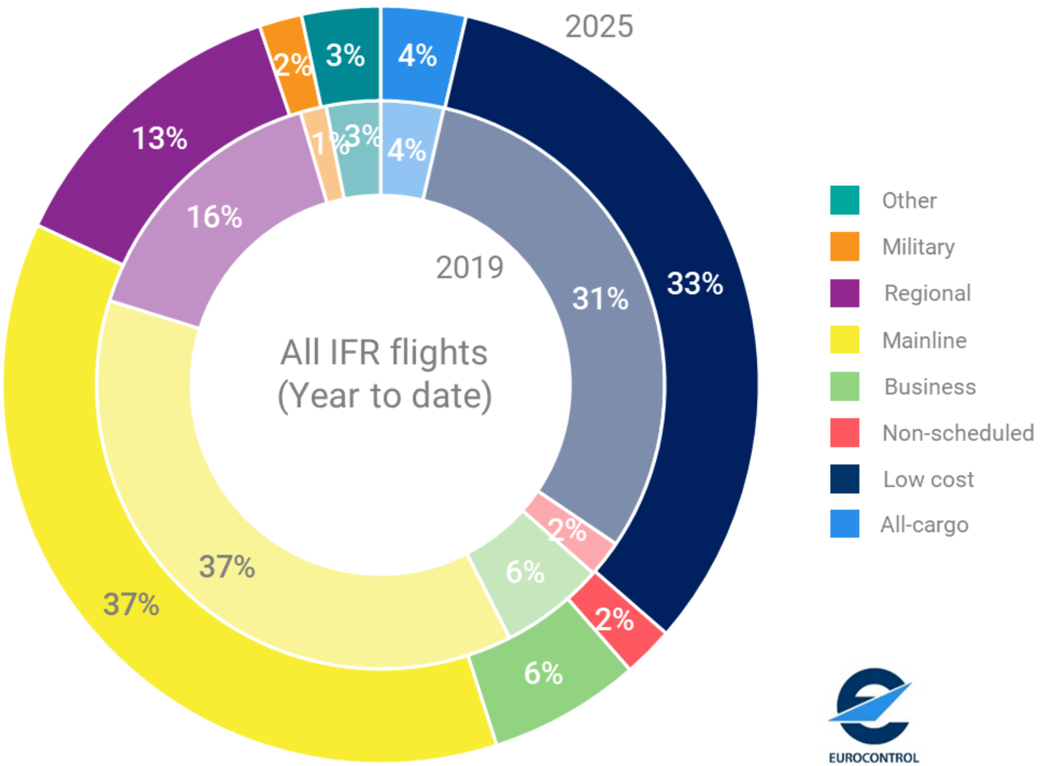
Compared to the equivalent week in 2024

Dep/Arr flights for week 21-27 Apr 2025



Market segments in the EUROCONTROL Network

Average share of total flights (year to date)

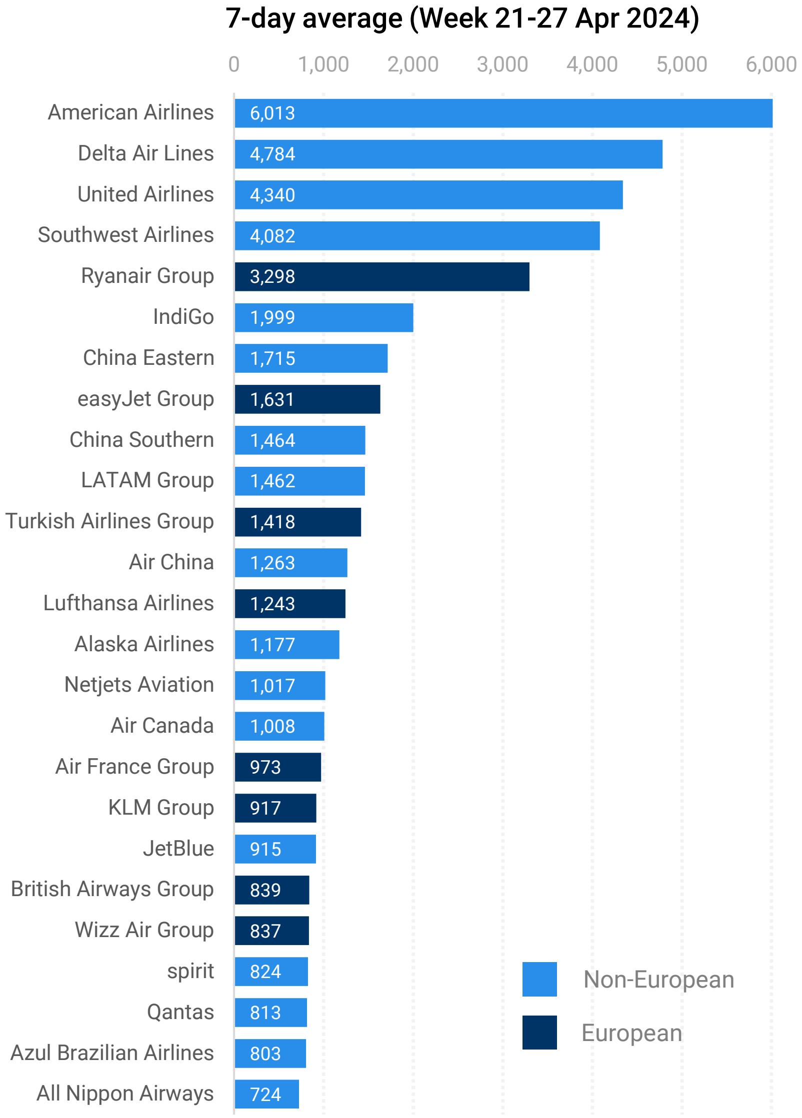


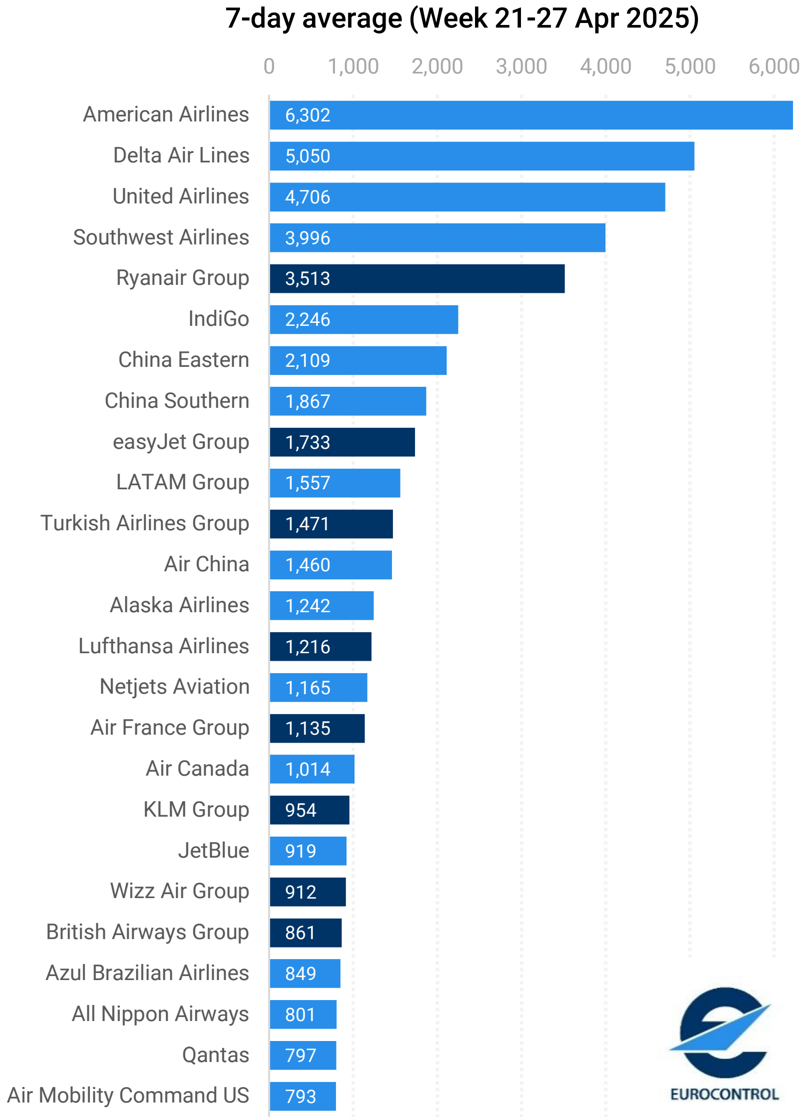
No.	Market segment	Avg. flights	% prev week	% prev year	% 2019
1.	Mainline	11,111	+1%	+7%	+6%
2.	Low Cost	10,961	+1%	+8%	+9%
3.	Regional	3,855	+6%	+2%	-10%
4.	Business	1,898	+12%	-3%	+22%
5.	Other	1,035	+9%	+15%	+33%
6.	All-cargo	916	-1%	-8%	+9%
7.	Non-Scheduled	794	+13%	+9%	-27%
8.	Military	501	+0%	+14%	+2%

- 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 33%, up by 2pp 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 (+1%) and Low Cost (+1%); moderate increases for Non-Scheduled and Regional (+6% each) and a solid increase for Business Aviation (+9%, owing to dynamic domestic flows in Spain as well as on the France ↔ Germany flow). All-cargo posted a slight decrease (-1% on previous week, owing to declines on domestic Italy and on Germany ↔ United States flow)
- Six market segments recorded traffic above 2019 levels, notably Business Aviation (+22%), All-cargo (+9%), Low Cost (+9%) and Mainline (+6%). Two market segments recorded traffic below 2019 levels: Regional (-10%) and Non-Scheduled (-27%).

Top 25 global aircraft operators

(average daily departure flights)

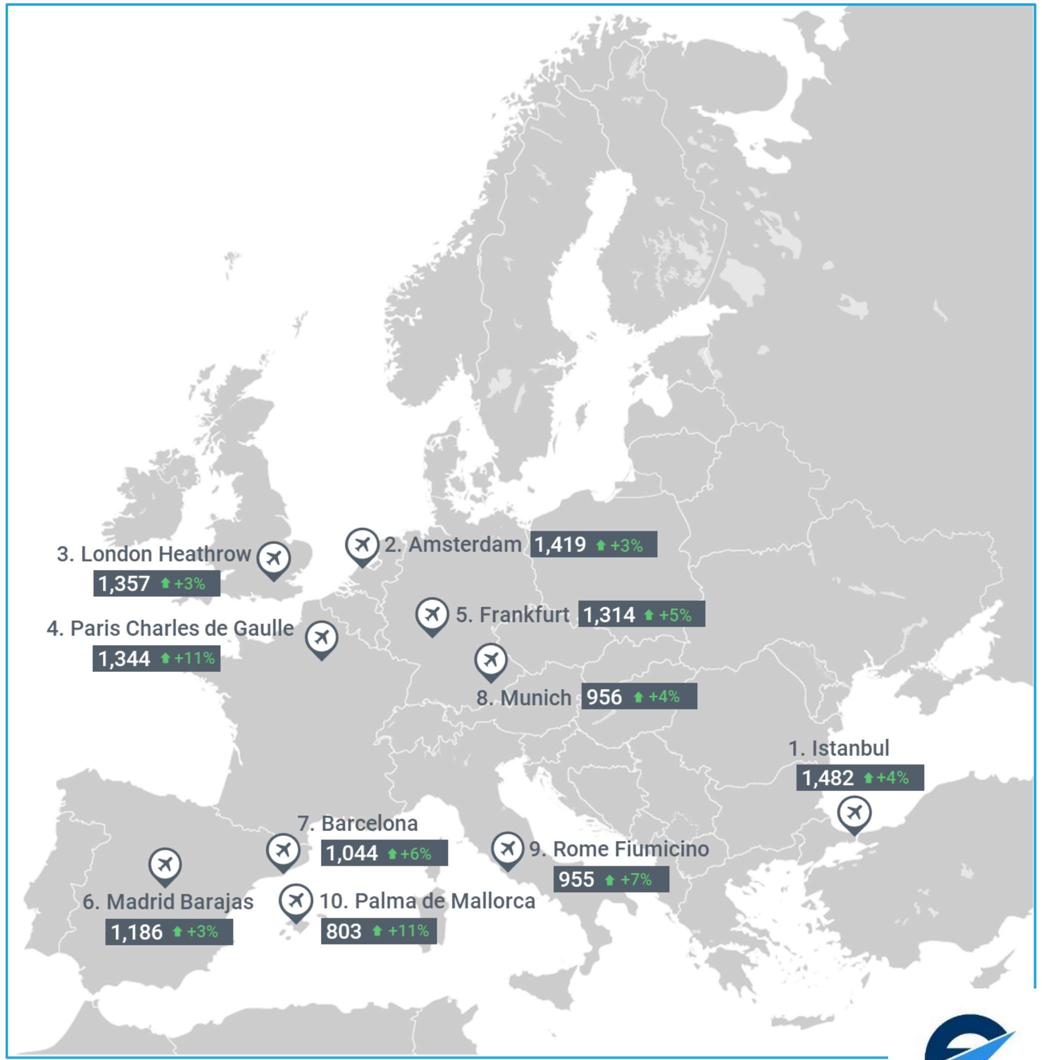




Source: Flightradar24 Historical Global Utilisation data

- Over the last week, eight European airlines were ranked in the top 25 global aircraft operators – the same number as in the equivalent 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 17 this year is quite similar to the one last year except for China Southern, which outpaced easyJet.
- Seven more European carriers made the top 25: Turkish Airlines Group (11th), Lufthansa Airlines (14th), Air France Group (16th), KLM Group (18th), Wizz Air Group (20th), British Airways Group (21st).

Top 10 airports



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Airport ranking

Week 21-27 Apr 2025

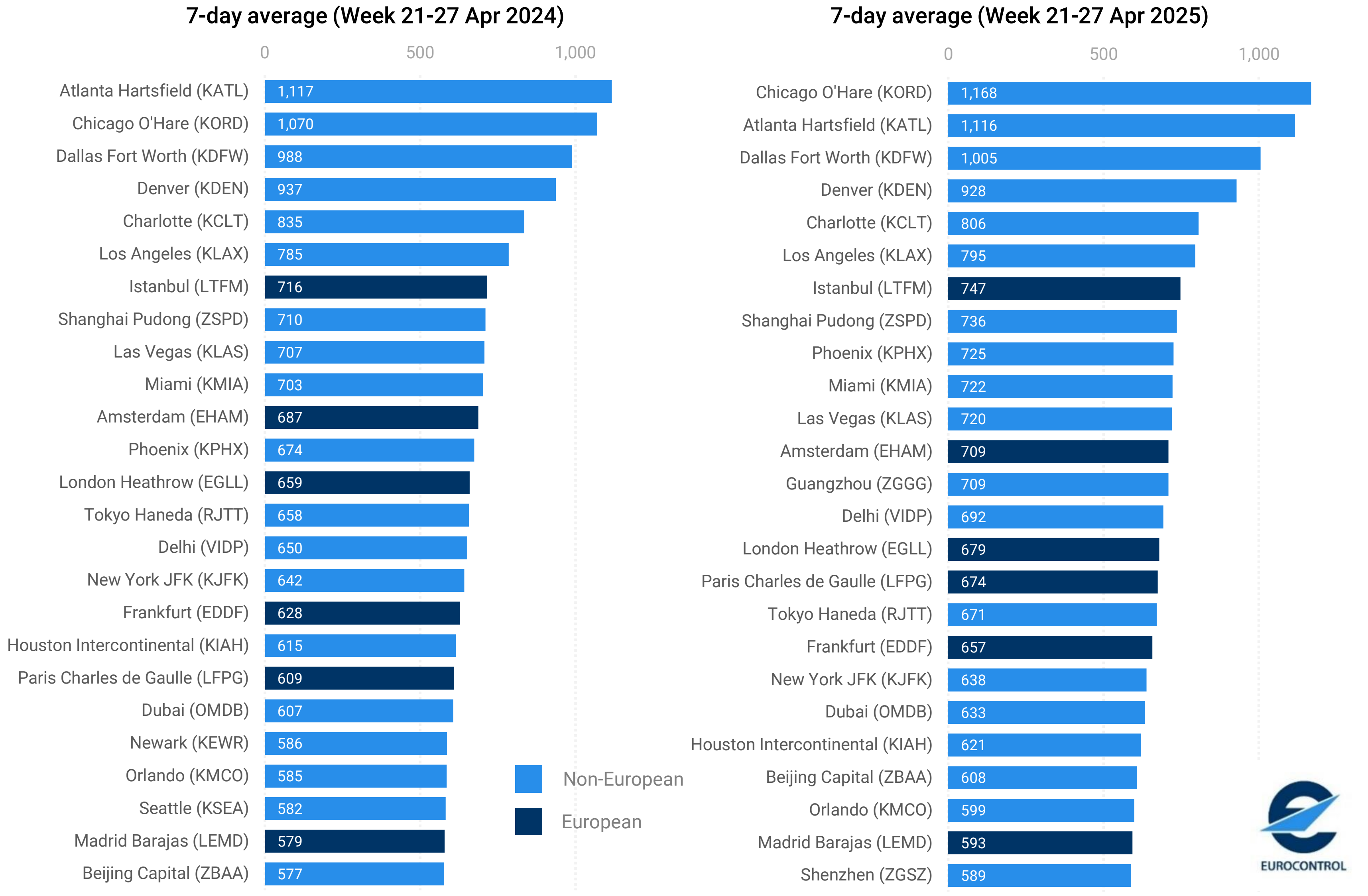
See more

No.	Airport	Avg. daily dep/arr flights	% prev week	% prev year	% 2019
1.	Istanbul	1,482	+1%	+4%	+24%
2.	Amsterdam	1,419	+2%	+3%	-2%
3.	London Heathrow	1,357	+0%	+3%	+1%
4.	Paris Charles de Gaulle	1,344	+1%	+11%	-6%
5.	Frankfurt	1,314	+1%	+5%	-8%
6.	Madrid Barajas	1,186	+1%	+3%	+1%
7.	Barcelona	1,044	+2%	+6%	+3%
8.	Munich	956	+1%	+4%	-14%
9.	Rome Fiumicino	955	+1%	+7%	+9%
10.	Palma de Mallorca	803	+5%	+11%	+17%

- Compared with the last edition, there was only one change in the top 10: Zurich exited the top 10 and Palma de Mallorca entered it.
- Istanbul (1,482 flights per day, +0.5% vs the previous week), followed by Amsterdam (1,419, +2.4%) and London Heathrow (1,357, +0.4%) are the busiest airports.
- All of week 17's top airports recorded more flights than in the same week in 2024, with the highest growth at Paris CDG and Palma de Mallorca (+11% each).
- Six of the top 10 airports (Istanbul, Palma de Mallorca, Rome, Barcelona, London and Madrid) are currently handling traffic above their 2019 levels.

Top 25 global airport departures

(average daily departure flights)



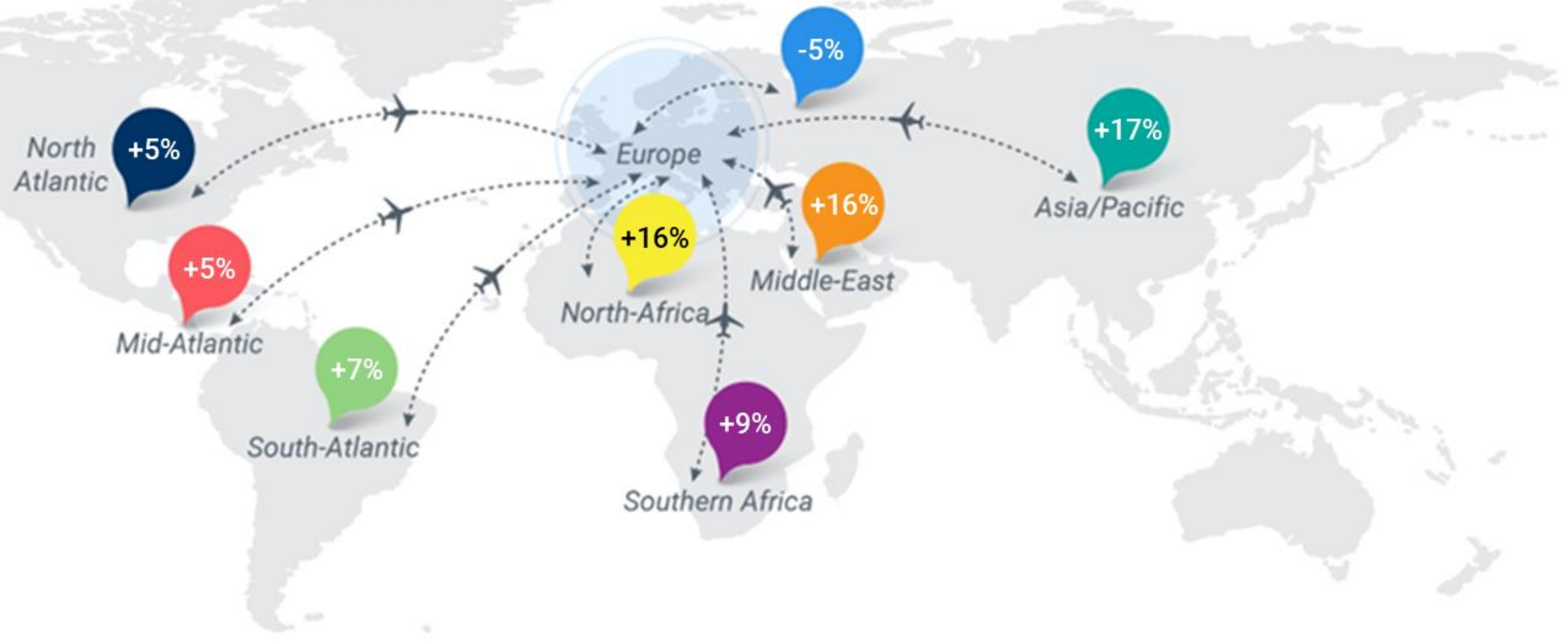
Source: Flightradar24 Historical Global Utilisation data

- Over the last week, six European airports made the top 25 in terms of global airport departures (same number as in the corresponding week in 2024).
- There are three European airports in the top 15: Istanbul (7th), Amsterdam Schiphol (12th) 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, and Shanghai Pudong (8th).

Traffic flows

(average daily departure/arrival flights for week 21-27 Apr 2025)

Region	Average daily flights	% prev week	% prev year	% 2019
Intra-Europe	23,872	+4%	+4%	+1%
Europe ↔ Middle-East	1,521	-4%	+16%	+9%
Europe ↔ North-Africa	1,425	-1%	+16%	+26%
Europe ↔ North Atlantic	1,373	+2%	+5%	+21%
Europe ↔ Asia/Pacific	958	+0%	+17%	+20%
Europe ↔ Other Europe	321	+16%	-5%	-69%
Europe ↔ Southern Africa	306	+1%	+9%	+0%
Europe ↔ South-Atlantic	197	+1%	+7%	+11%
Europe ↔ Mid-Atlantic	179	-1%	+5%	+0%
Non Intra-Europe	6,279	-0%	+11%	+2%



- The main intra-European traffic flow recorded 23,872 daily flights last week, 4% higher than the previous week. Intercontinental flows amounted to 6,279 daily flights on average, slightly below (-0.1%) the levels of the previous week.
- The second-largest flow is with the Middle East, with 1,521 flights per day (-4% compared with the previous week owing to decreases in the Greece ↔ Israel, Cyprus ↔ Israel and Italy ↔ Israel flows). The flow is recording traffic 16% above the same week in 2024 and +26% vs 2019 levels.
- The third-largest flow is with North Africa, with 1,425 average daily flights (-1% compared with the previous week, owing mainly to decreases on the Egypt ↔ Türkiye and France ↔ Tunisia and Egypt ↔ Belgium flows).
- The fourth-largest flow is with North America, with 1,373 daily flights (+2%, owing to increases on flows between the US and UK, Ireland and Austria).
- The flow between Europe and the Asia/Pacific region (958 flights per day) shows traffic +17% vs the same week in 2024, and +20% compared with 2019 levels.
- The flow to 'Other Europe' (including the Russian Federation) remains massively reduced at -69% compared with 2019.

Top 10 long-haul country pairs

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

Week 21-27 Apr 2025

No.	Country pair	Average daily flights	% prev week	% prev year	% 2019
1.	UK ↔ US	312	+4%	+2%	+3%
2.	Germany ↔ US	162	-1%	+4%	+8%
3.	France ↔ US	123	+0%	+9%	+11%
4.	Netherlands ↔ US	83	+2%	+1%	-1%
5.	Italy ↔ US	82	-0%	-3%	+39%
6.	Ireland ↔ US	78	+5%	+19%	+26%
7.	Spain ↔ US	72	+1%	+1%	+17%
8.	UAE ↔ UK	62	-0%	-2%	+29%
9.	Egypt ↔ Russia	50	+0%	+33%	n/a
10.	Russia ↔ UAE	50	+5%	+18%	+1947%

- 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 three long-haul flows posted increases on the previous week with main increases on Ireland ↔ US, Russia ↔ UAE (+5% each) and UK ↔ US (+4%) as well as Netherlands ↔ US (+2%). Main decrease was recorded on the Germany ↔ US (-1%) flow.
- Eight of the top long-haul flows recorded more traffic vs 2024 with double-digit increases on three of them: Egypt ↔ Russia, Ireland ↔ US and Russia ↔ UAE.
- Eight flows are currently above 2019 levels, notably Russia ↔ UAE (+1,947%), Italy ↔ US (+39%) and UAE ↔ UK (+29%).

Economics

Week 21-27 Apr 2025

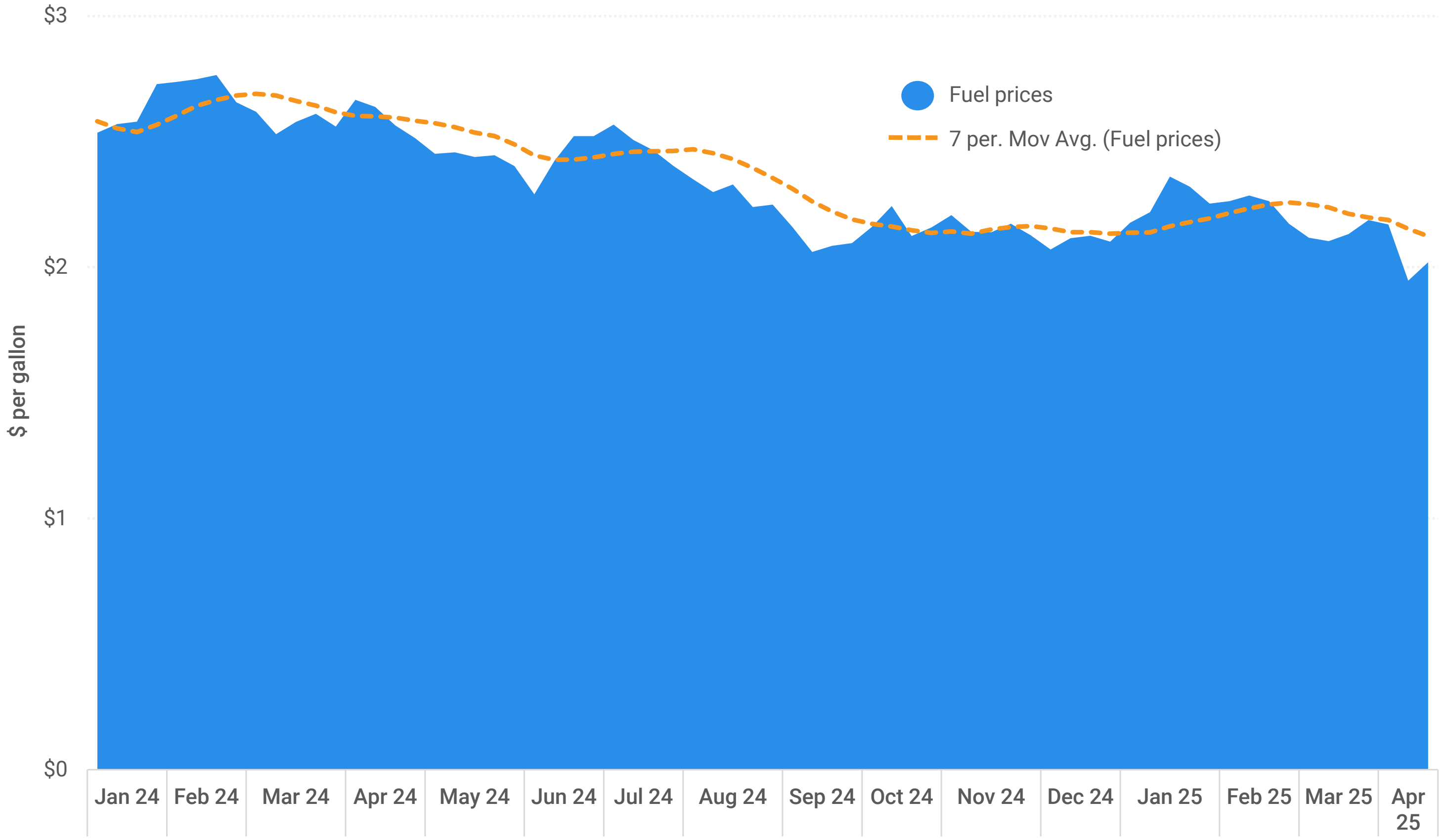
18 Apr 2025
avg fuel price:

$2.02 /gallon

-7%
vs. $2.17 /gallon
on 04 Apr 2025

Source: IATA/Platts

Jet fuel price (Europe)

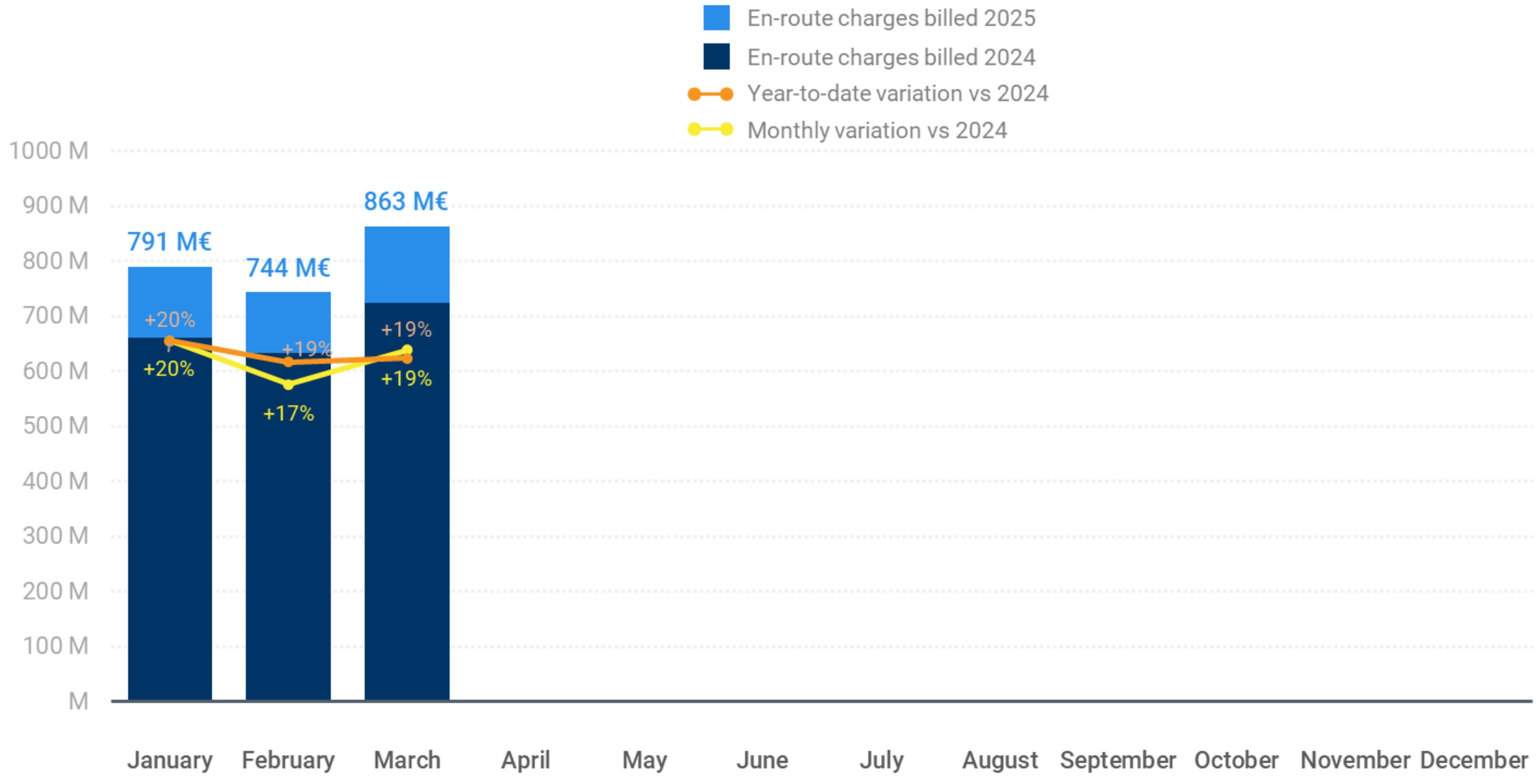


Source: IATA/Platts

- The average price of jet fuel closed at 2.02 USD/gallon on 18 April 2025, a drop of 7% with the level of two weeks ago.
- 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 agreed – at the time – 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.
- However, in early April 2025, OPEC+ members unexpectedly announced they would increase output by 0.4 million barrels/day of oil in May - which is three times more than the group originally planned.

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

Year-to-date amount billed: 2,398 M€ (+19% vs 2024)



- At Network level, 863M€ were billed for March 2025 which represents +19% vs 2024 and +48% vs 2019.
- These changes were driven by the evolution of unit rates and of traffic characterized by the distance flown (+1.2% March 2025 vs same month last year). The average weight of each aircraft remained relatively stable between (+0.4%).
- The March 2025 variation vs March 2024 (+19%) is explained by an increase in Unit Rates (+11%) and an increase in total en-route Service Units (+6%).
- On a year-to-date basis, EUROCONTROL has billed 2,938M€, 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