

SUPPORTING
EUROPEAN
AVIATION



EUROCONTROL

EUROPEAN AVIATION OVERVIEW

23-29 Jun 2025

AVIATION
INTELLIGENCE+



Thursday 03 July 2025

Headlines

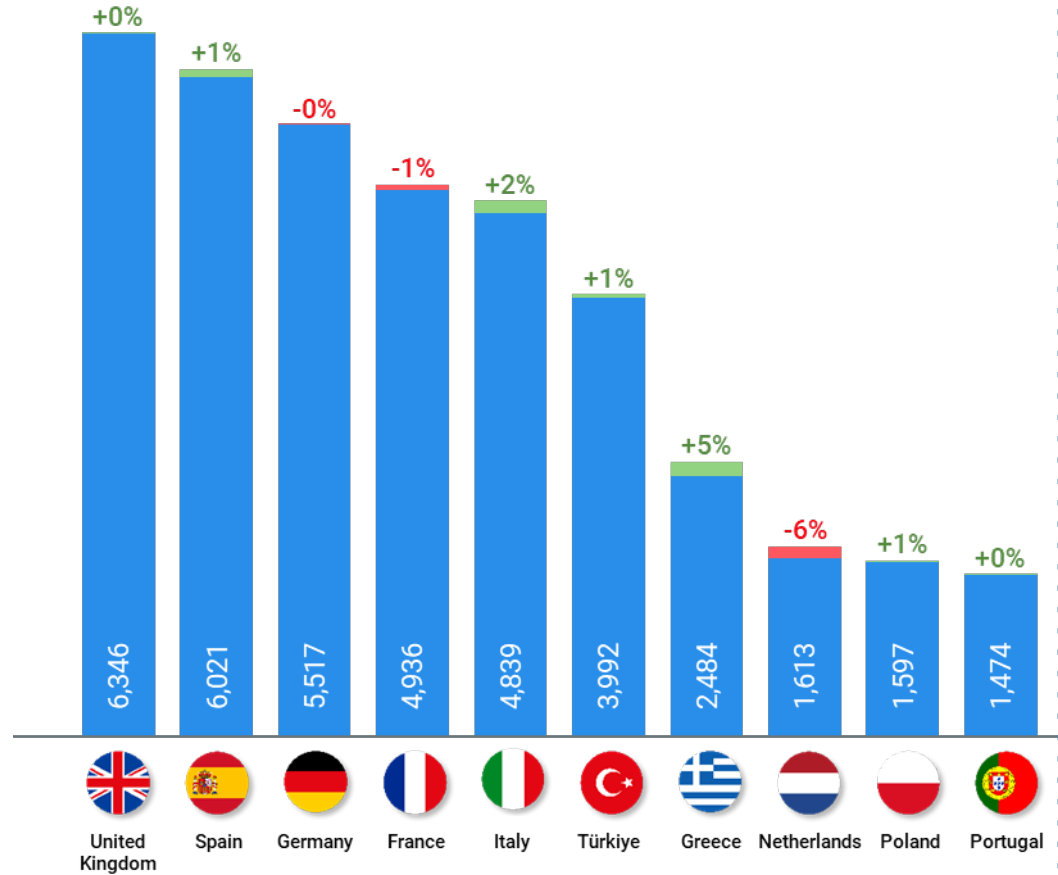
(Week 23-29 Jun 2025)

- The network recorded 34,821 average daily flights in Week 26 (+2% vs 2024), slightly below 2019 levels (98%).
- Overall, traffic in Week 26 was +0.5% vs Week 25.
- On average, the top 10 carriers slightly reduced their capacities by 0.7% compared to the previous week. Meanwhile, at country level, the top 10 States saw their flights increase by 0.5%.
- Year-to-date traffic is 99% of 2019, 4% more than 2024, in line with the latest EUROCONTROL monthly traffic forecast released in February 2025.
- Arrival and departure punctuality were 71.1% and 63.7% respectively, better than the equivalent week both for last year and also for 2019.
- En-route ATFM delays were +41% compared to the previous week, with a daily average of just below 101,700 minutes – but 59% below the same week in 2024 (delays were excessively high in 2024). In Week 26, this translated into an average of 2.9 min/flight.
- ATC capacity/staffing was the top delay cause last week (51% of all en-route ATFM delays), followed by Weather (36%).
- The average jet fuel price closed at 2.19 USD/gallon on 27 June, a 7% increase on two weeks earlier.

Top 10 busiest States

On week 23-29 Jun 2025

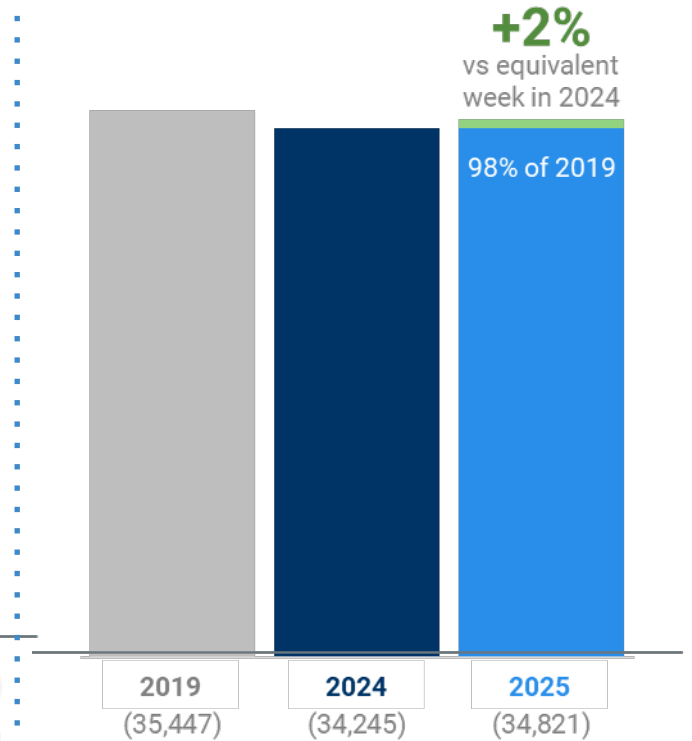
(all flights excl. overflights compared with previous week)



Traffic situation

Average daily flights (including overflights)

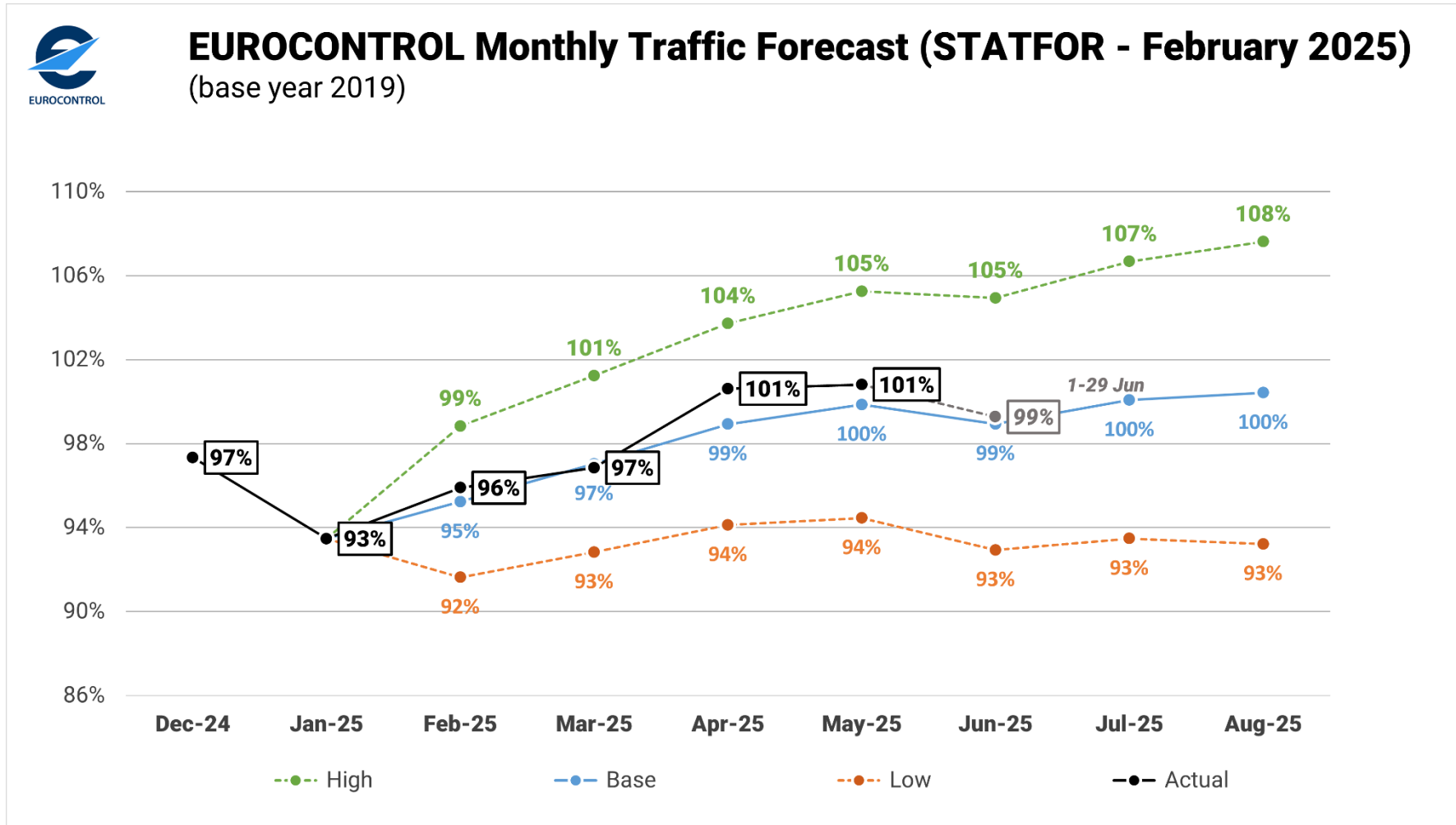
Week 23-29 Jun 2025



Overall situation compared to the EUROCONTROL Traffic Forecast

(ECAC departures and arrivals flights)

Base year 2019



The picture shows the [three scenarios of the STATFOR monthly forecast issued in February 2025](#) for the ECAC area.

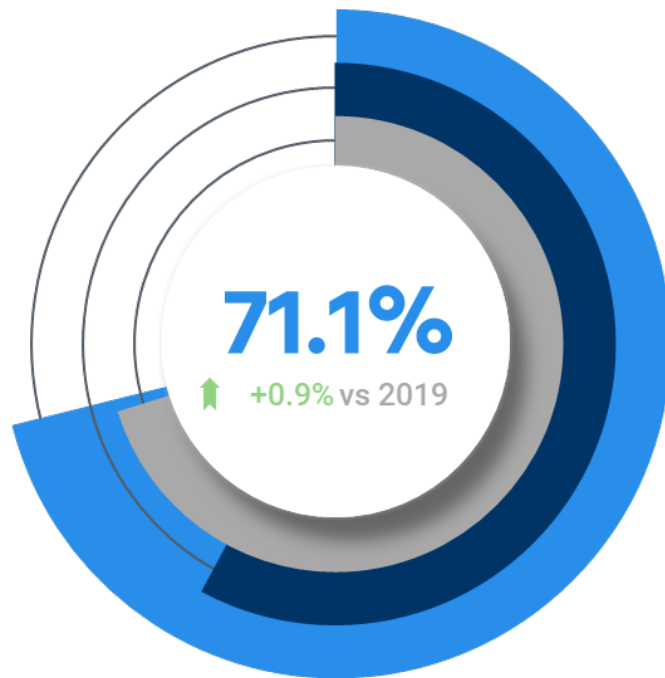
- ✈ The latest [EUROCONTROL flight forecast \(2025-2031\)](#) was published on 28 February 2025. Since that date, and up to June 2025, European traffic (flights) have evolved largely in line with the Base scenario.
- ✈ For the period 1-29 June, flights closed at 99% of June 2019 levels.
- ✈ On a year-to-date basis, Network traffic is at 99% of 2019, and +4% vs 2024.
- ✈ The above-mentioned forecast will be next updated in October 2025.

Arrival & departure punctuality

(all network scheduled flights)

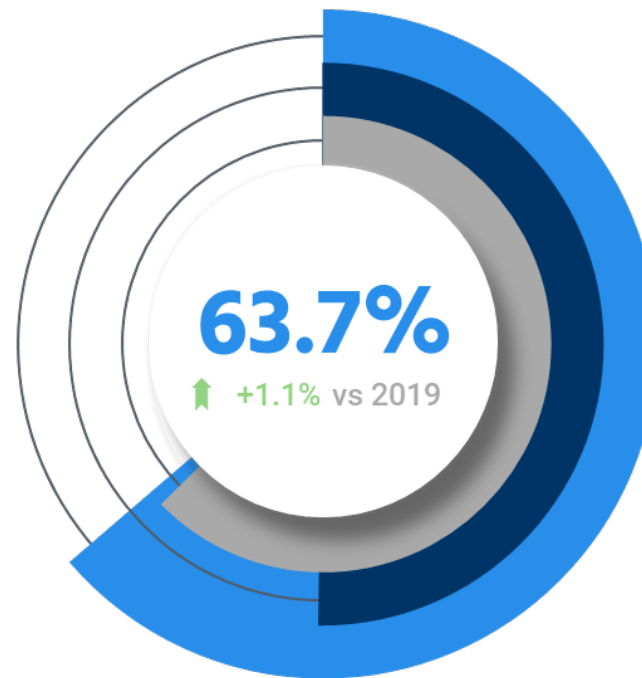
Week 23-29 Jun 2025

ARRIVAL PUNCTUALITY



70.2% _____ in 2019
57.9% _____ in 2024

DEPARTURE PUNCTUALITY



62.6% _____ in 2019
50.2% _____ in 2024



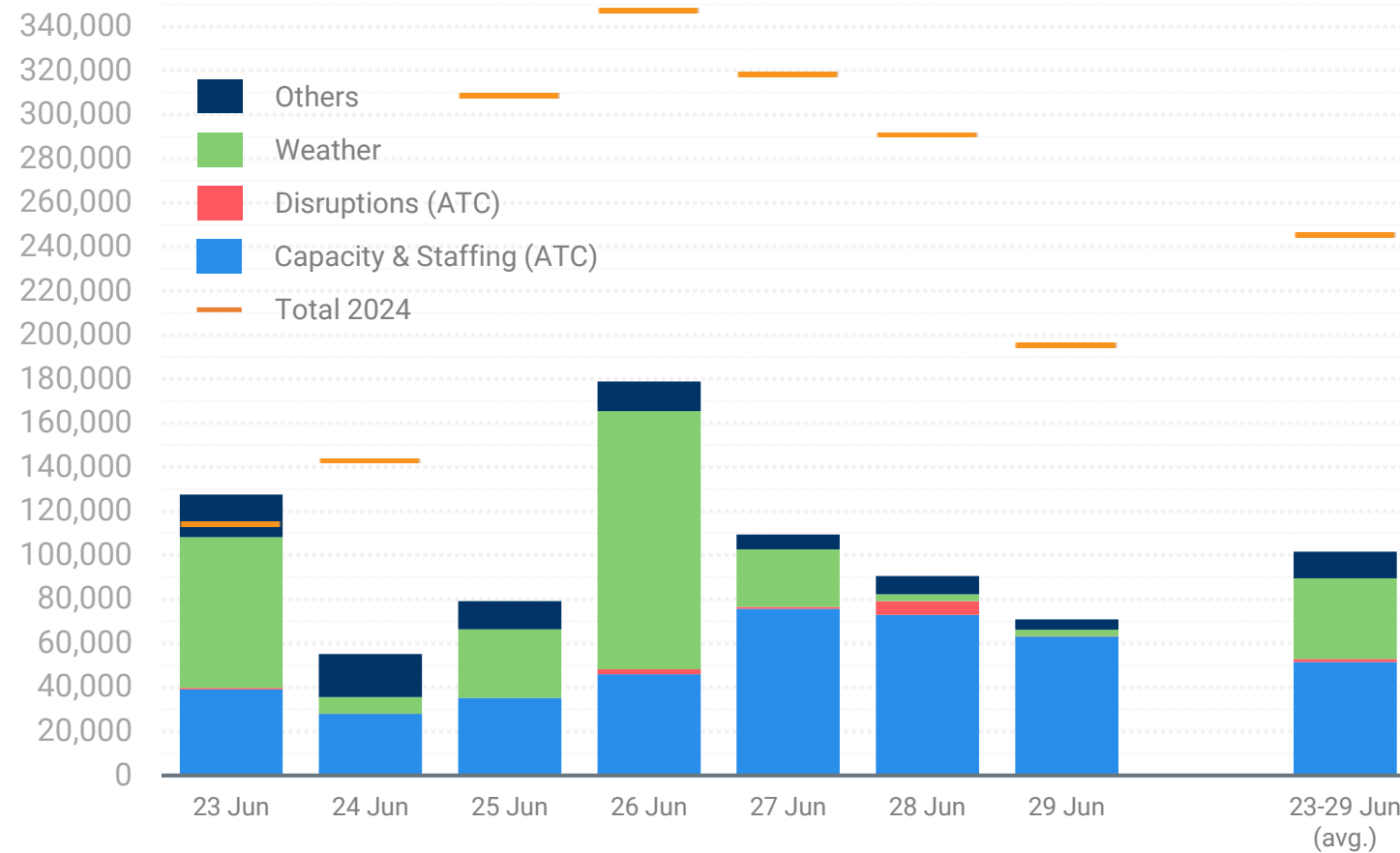
- ✈ Network punctuality improved when compared to the equivalent week in 2024. Arrival punctuality increased by 13.2 percentage points to 71.7%, and departure punctuality increased by 13.5 percentage points to 63.7%. Compared to the same week in 2019, both arrival and departure punctuality were better (respectively +0.9pp and +1.1pp).
- ✈ Nice experienced daily ATC capacity regulations (with some days seeing with multiple regulations).
- ✈ Athens continued to see daily ATC capacity regulations as demand far exceeded the capacity.
- ✈ The NATO Summit led to reduced capacity and caused regulations at Amsterdam, with 23 June seeing delays for the summit as well as weather.
- ✈ Zurich suffered from weather (cumulonimbus and wind direction) regulations, as well as the trial implementation of a new system.
- ✈ Paris Orly was regulated due to weather (cumulonimbus and high winds) with the evening of the 25 and morning of 26 June mainly driving the delay for the week.

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

En-route ATFM delays

Delays per cause (EUROCONTROL Area)

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

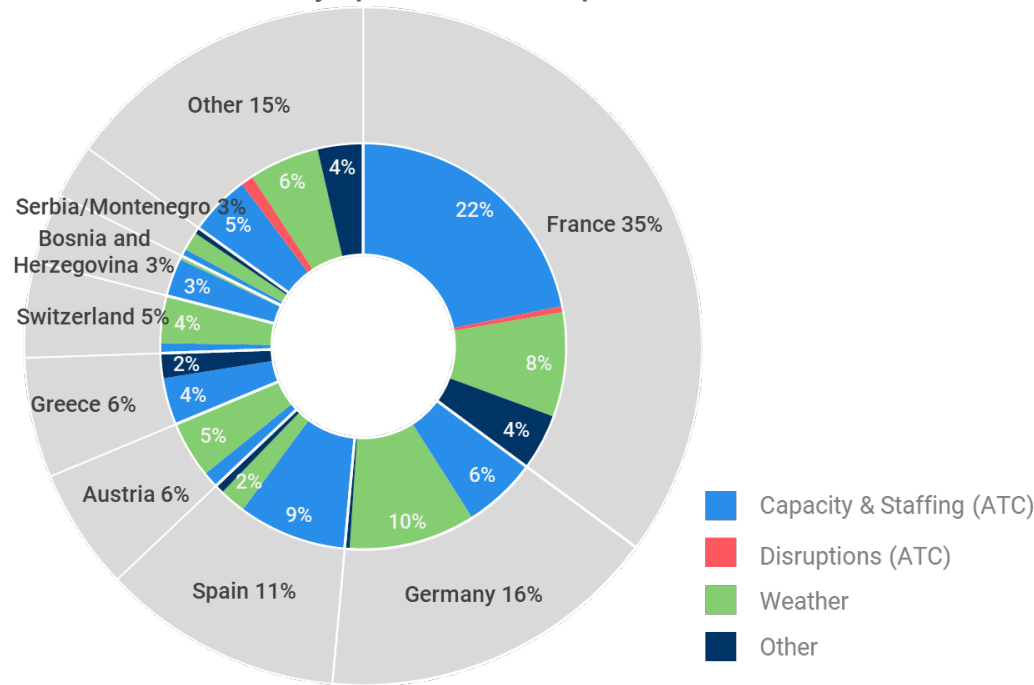


- ✈ Week 26 (23 - 29 June) registered higher en-route ATFM delays compared to Week 25 (+41%), with an average of 101,634 daily minutes; this is however 59% lower than the same operational week in 2024, highly affected by weather delays in Central Europe.
- ✈ ATC capacity/staffing was responsible for 51% of all en-route ATFM delays (notably in France, Germany and Spain). Weather's share of 36% was mainly due to convective activity in Germany, Austria, Switzerland and South-East of France.
- ✈ There were 3.6 min of total ATFM delay per flight in Week 26 made up of 2.9 min/flight en-route delay, and 0.6 min/flight airport delay. Total ATFM delay was 29% higher than in Week 25.

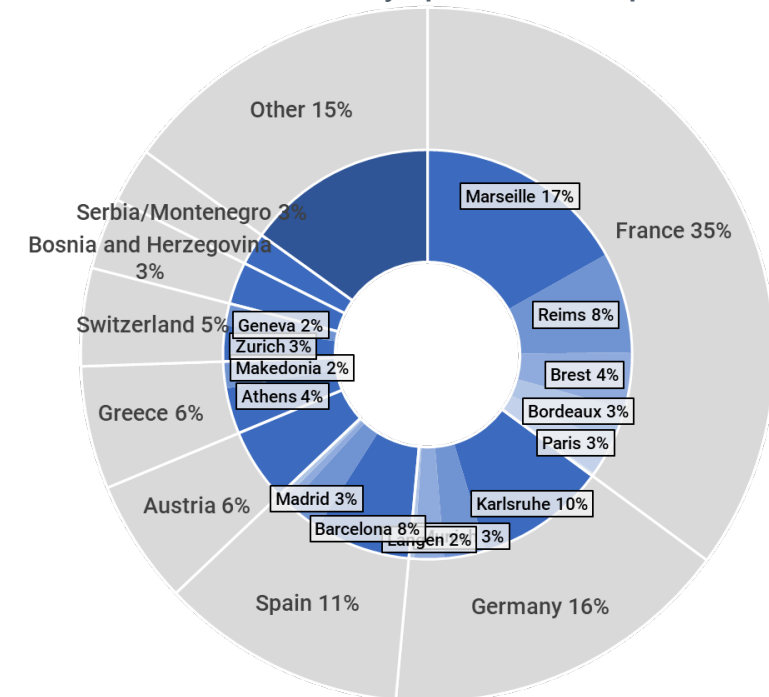
En-route ATFM delays per States per cause & per ACC

Week 23-29 Jun 2025

En-route ATFM delays per cause for top 8 States



En-route ATFM delays per ACC for top 8 States













- ➔ France accounted 35% of en-route ATFM delays; these were mainly attributed to Marseille-East ACC with traffic experiencing daily ATFM Capacity delays, with convective weather further complicating traffic management Monday, Wednesday and Thursday. Reims ACC was affected by daily capacity and staffing delays, in addition to weather delays between Wednesday and Friday. From Sunday through to Thursday, Reims ACC handled additional traffic which was forced to avoid airspace reservations centred on the Hague, which were put in place to facilitate security measures around the 2025 NATO Summit. Daily Capacity issues resulted, with further delays attributed to ATC Staffing issues, together with mid-week convective weather.
- ➔ Germany accounted for 16% of en-route ATFM delays, largely attributed to weather especially in Karlsruhe ACC, where convective weather cells complicated traffic management on Monday, but more notably on Thursday and particularly in the Southern and Central sector groups.
- ➔ Spain accounted for 11% of en-route ATFM delays, with mainly Barcelona ACC approaching its peak summer traffic demand which is prompting daily capacity measures, aggravated by convective weather cells on Monday, Tuesday and Sunday.

Top 10 States

Departures and arrivals

Week 23-29 Jun 2025

No.	Country	Average daily flights	% prev week	% prev year	% 2019
1.	 United Kingdom	6,346	+0%	↑ +2%	↓ -5%
2.	 Spain	6,021	+1%	↑ +4%	↑ +8%
3.	 Germany	5,517	-0%	↑ +3%	↓ -13%
4.	 France	4,936	-1%	↑ +1%	↓ -4%
5.	 Italy	4,839	+2%	↑ +5%	↑ +10%
6.	 Türkiye	3,992	+1%	↑ +1%	↑ +15%
7.	 Greece	2,484	+5%	↑ +2%	↑ +19%
8.	 Netherlands	1,613	-6%	↓ -6%	↓ -11%
9.	 Poland	1,597	+1%	↑ +10%	↑ +21%
10.	 Portugal	1,474	+0%	↑ +3%	↑ +12%











[See all States](#)



- ➔ The top 10 States, in aggregate, recorded 0.5% more flights during Week 26 than in the previous week, with half of the States posting an increase on Week 25.
- ➔ All but one State posted an increase on the previous year.
- ➔ Netherlands recorded the biggest decrease (-6% on previous week), owing to decreases from small aircraft operators, easyJet and KLM mainly on flows from/to UK, Germany and on domestic flows. The NATO summit in The Hague (25-26 June) led to reduced capacities during Week 26 in the Netherlands and particularly at Amsterdam airport.
- ➔ Greece recorded the greatest increase (+5% on the previous week), owing to increases on flows from/to Italy and UK (easyJet), Israel (Israir, El Al).
- ➔ Six States in the top 10 are recording traffic above 2019 levels (Poland, Greece, Türkiye, Portugal, Italy and Spain), with the remainder between 4% and 13% below pre-COVID levels.

Top 10 aircraft operators

Week 23-29 Jun 2025 (avg daily flights)

No.	Aircraft operator	Average daily flights	% prev week	% prev year		% 2019	
1.	 Ryanair Group	3,654	-1%	↑	+3%	↑	+40%
2.	 easyJet Group	1,822	+1%	↑	+5%	↓	-3%
3.	 Turkish Airlines Group	1,676	-0%	↑	+3%	↑	+13%
4.	 Lufthansa Airlines	1,240	+0%	↑	+3%	↓	-24%
5.	 Air France Group	1,168	-0%	↑	+1%	↓	-13%
6.	 Wizz Air Group	933	-1%	↑	+7%	↑	+41%
7.	 KLM Group	889	-4%	↓	-3%	↓	-6%
8.	 British Airways Group	868	-1%	↑	+2%	↓	-12%
9.	 SAS Group	748	-3%	↑	+12%	↓	-12%
10.	 Vueling	704	+1%	↓	-0%	↓	-4%

[See top 40 airlines](#)



- ✈ The top 10 aircraft operators, in aggregate, recorded slightly fewer (-0.7%) flights than in the previous week.
- ✈ Eight out of the ten aircraft operators in this top deployed lower or similar capacities from one week to another.
- ✈ KLM Group recorded the highest decrease (-4% on previous week), mainly on Germany ↔ Netherlands, Netherlands ↔ UK and Netherlands ↔ Norway flows. The NATO summit in The Hague during Week 26 implied capacity reductions compared to a typical summer week.
- ✈ easyJet slightly expanded (+1% on previous week), mainly on flows Greece ↔ Italy, domestic Italy, Greece ↔ UK and France ↔ UK.
- ✈ Compared with 2024, all the airlines/airline groups in this top 10 except KLM and Vueling recorded more flights – and only three of the top 10 carriers/groups (Wizz Air, Ryanair and Turkish Airlines) flew more than in 2019.

Top 10 airports

Week 23-29 Jun 2025 (avg daily flights)

No.	Airport	Avg. daily dep/arr flights	% prev week	% prev year		% 2019
1.	Istanbul	1,553	+1%	↑	+2%	↑ +22%
2.	Paris Charles de Gaulle	1,404	+0%	↑	+1%	↓ -6%
3.	Frankfurt	1,383	-0%	↑	+7%	↓ -11%
4.	London Heathrow	1,334	-1%	↑	+1%	↓ -3%
5.	Amsterdam	1,311	-7%	↓	-6%	↓ -12%
6.	Madrid Barajas	1,227	+1%	↑	+0%	↓ -3%
7.	Barcelona	1,071	-2%	↑	+1%	↓ -0%
8.	Munich	1,031	-1%	↑	+9%	↓ -18%
9.	Rome Fiumicino	997	+1%	↑	+1%	↑ +3%
10.	Antalya	996	-0%	↓	-1%	↑ +10%

[See top 40 airports](#)

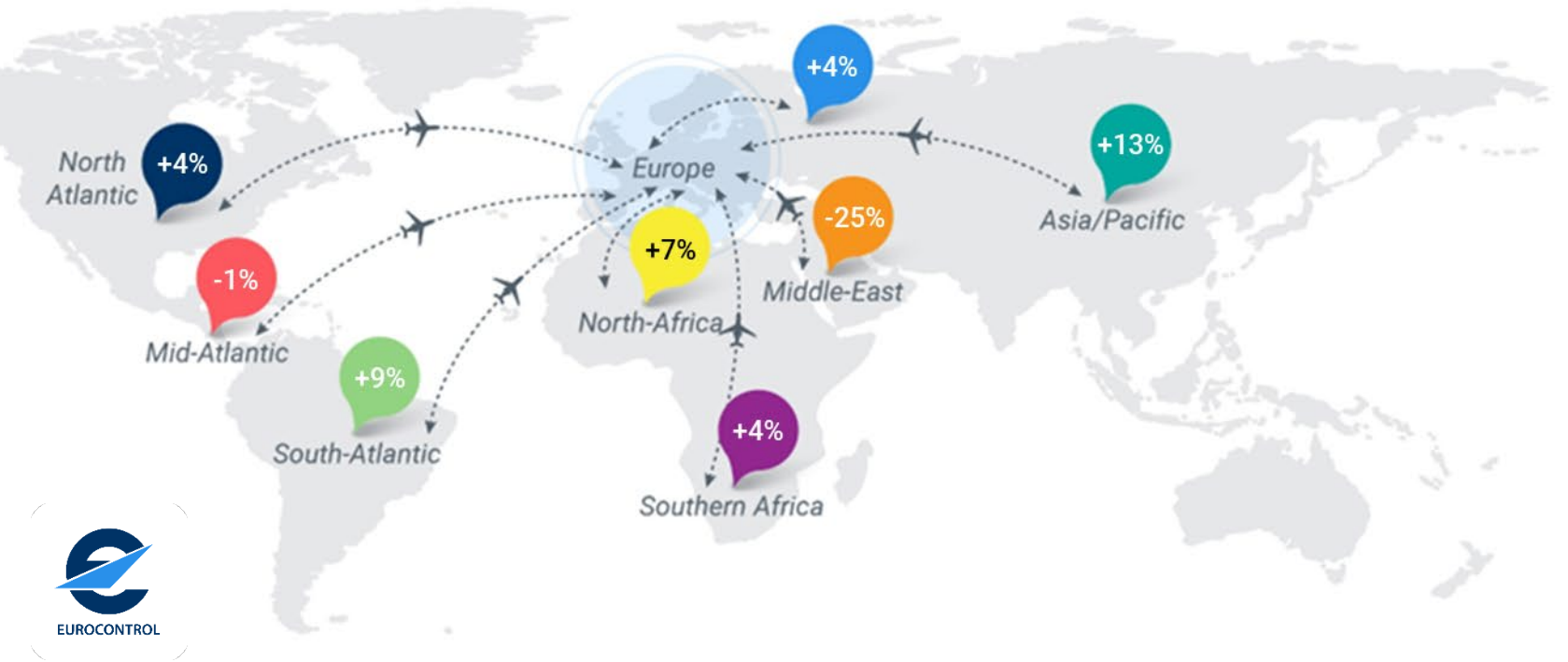


- ➔ Compared to the previous edition, Amsterdam slipped from the 2nd place to the 5th place, owing to the NATO Summit on 24 and 25 June 2025 (reduced capacity).
- ➔ Istanbul (1,553 flights per day, +0.7% vs previous week) remained the busiest airport followed by Paris CDG (1,404, +0.2%) and Frankfurt (1,383, -0.4%).
- ➔ Most airports (from the top 10) recorded a higher number of flights than in 2024 with, notably +9% more for Munich and +7% for Frankfurt.
- ➔ Three of the top 10 airports (Istanbul, Antalya and Rome) are currently handling traffic above their 2019 levels (respectively +22%, +10% and +3%).

Traffic flows

(average daily departure/arrival flights for week 23-29 Jun 2025)

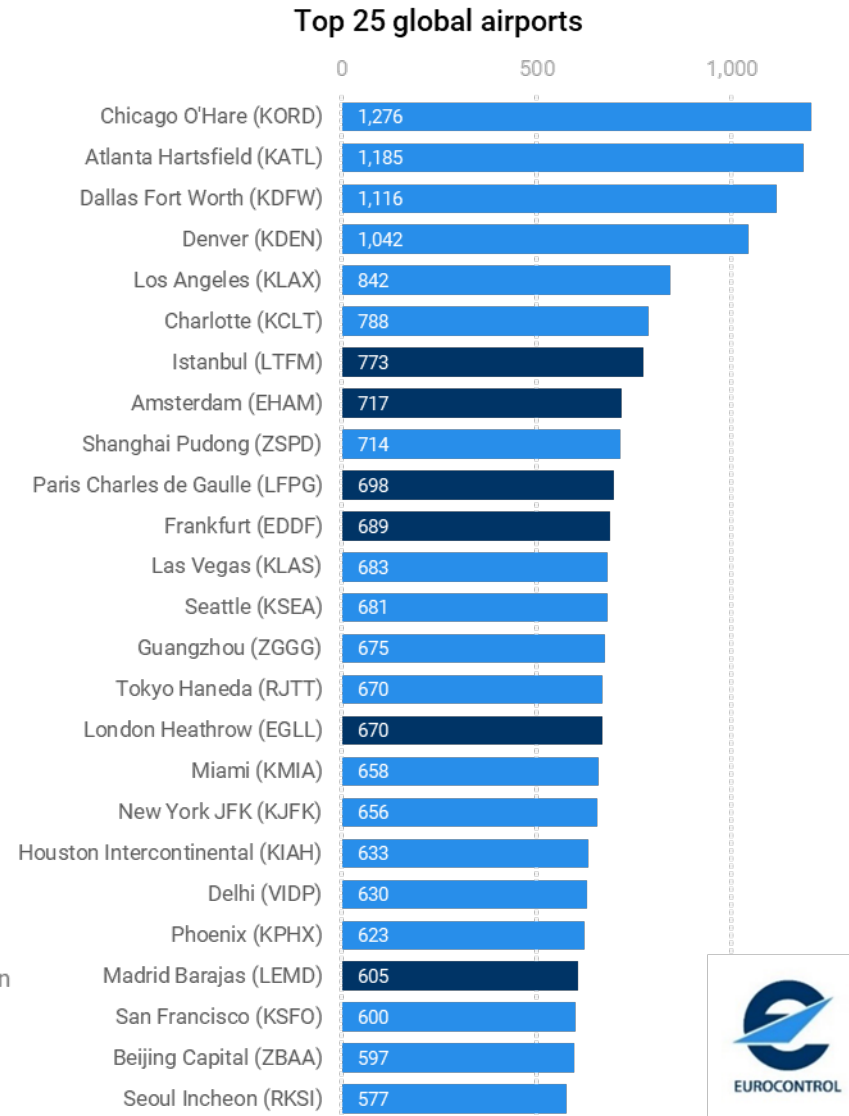
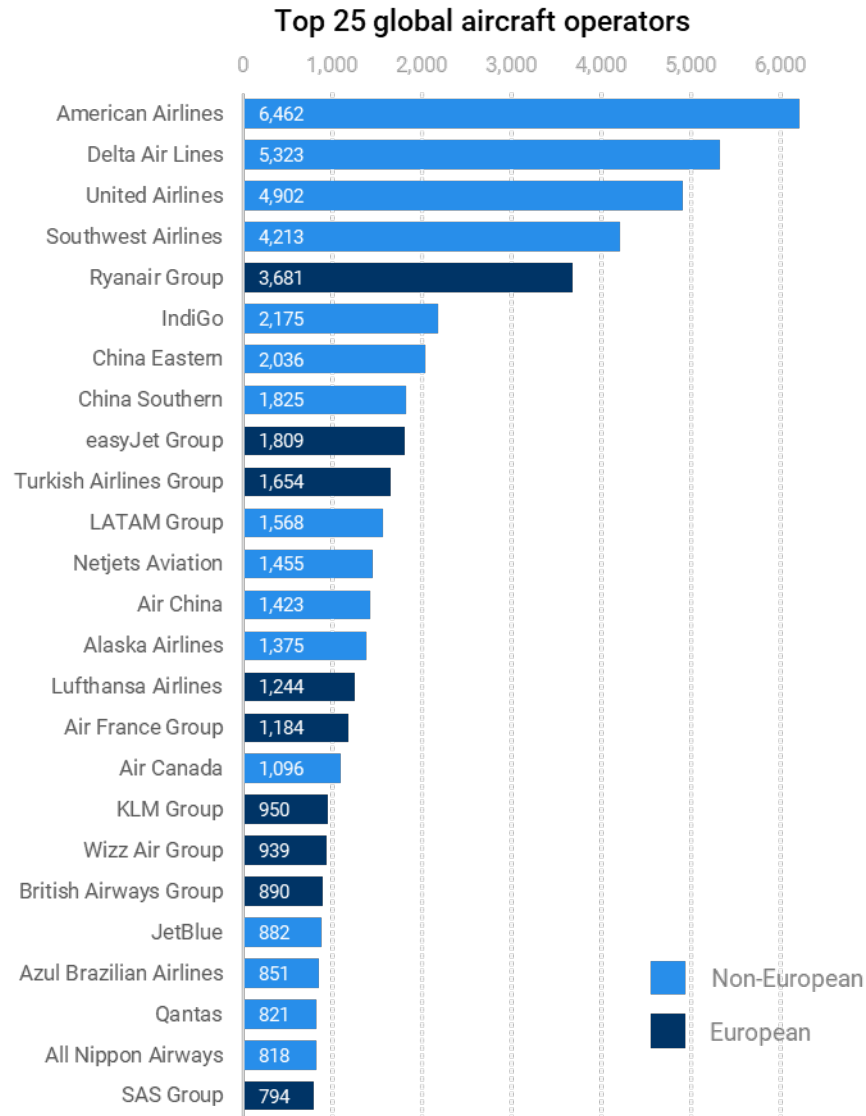
Region	Average daily flights	% prev week	% prev year	% 2019
Intra-Europe	27,387	↑ +0%	↑ +3%	↓ -1%
Europe ↔ North Atlantic	1,749	↑ +0%	↑ +4%	↑ +18%
Europe ↔ North-Africa	1,467	↑ +0%	↑ +7%	↑ +29%
Europe ↔ Middle-East	1,206	↑ +3%	↓ -25%	↓ -24%
Europe ↔ Asia/Pacific	1,021	↑ +2%	↑ +13%	↑ +24%
Europe ↔ Other Europe	512	↑ +1%	↑ +4%	↓ -62%
Europe ↔ Southern Africa	309	↑ +3%	↑ +4%	↑ +3%
Europe ↔ South-Atlantic	211	↑ +2%	↑ +9%	↑ +9%
Europe ↔ Mid-Atlantic	161	↑ +6%	↓ -1%	↓ -6%
Non Intra-Europe	6,635	↑ +1%	↓ -1%	↓ -6%



- ✈ The main intra-European traffic flow recorded 27,387 daily flights last week, 0.5% higher than the previous week. Intercontinental flows amounted to 6,635 daily flights on average, +1.3% vs the levels of the previous week.
- ✈ The second-largest flow is with North America, with 1,749 flights per day (+0.2% compared with the previous week). The flow Europe ↔ US is recording a 3.2% increase (in number of flights) on previous year, while the flow Europe ↔ Canada is recording a 5.7% increase.
- ✈ The third-largest flow (to/from North Africa) saw 1,467 average daily flights, +0.1% compared with the previous week, a mix between increases on France ↔ Algeria, Spain ↔ Algeria and France ↔ Morocco and decreases on Egypt ↔ UK, Egypt ↔ Germany or Italy ↔ Tunisia.
- ✈ The fourth-largest flow - with Middle-East- is at 1,206 daily flights, +3% compared with the previous week owing to increases on flights Cyprus ↔ Israel or Greece ↔ Israel. The flow was highly impacted by the Middle-East crisis and recorded a 25% decrease on last year owing to interruption of flights during Week 26 on flows from/to Iran, Iraq and Israel.
- ✈ The flow between Europe and the Asia/Pacific region (1,021 flights per day) shows traffic +2% vs the same week in 2024, owing to slight increases on flows China ↔ UK or Kazakhstan ↔ Türkiye. Compared to 2019 levels, the flow recorded a +24% increase.
- ✈ The flow to 'Other Europe' (including the Russian Federation) remains massively reduced, -62% lower than 2019.

Top 25 global aircraft operators and airport departures

(average daily departure flights) (Week 23-29 Jun 2025)



Source: Flightradar24 Historical Global Utilisation data



- ➔ Over the last week, nine European airlines were ranked in the top 25 global aircraft operators– same number compared to the equivalent week last year.
- ➔ Three European airline groups make the global top 10: Ryanair Group (5th), easyJet Group (9th) and Turkish Airlines (10th).
- ➔ Six more European carriers made the top 25, starting with Lufthansa Airlines (15th), Air France Group (16th), KLM Group (18th), Wizz Air Group (19th) and British Airways Group (20th). SAS Group is the last airline of this top 25.
- ➔ Over the last week, six European airports made the top 25 in terms of global airport departures.
- ➔ Three make the top 10, with Istanbul highest in 7th, followed by Amsterdam Schiphol (8th) and Paris CDG (10th).
- ➔ The other European airports to make the top 25 are Frankfurt (11th), London Heathrow (16th) and Madrid (22nd).
- ➔ The top 10 global airports continue to be dominated by US airports: 6/10 are American, and only 1 Chinese: Shanghai Pudong (9th).

Economics

Week 23-29 Jun 2025

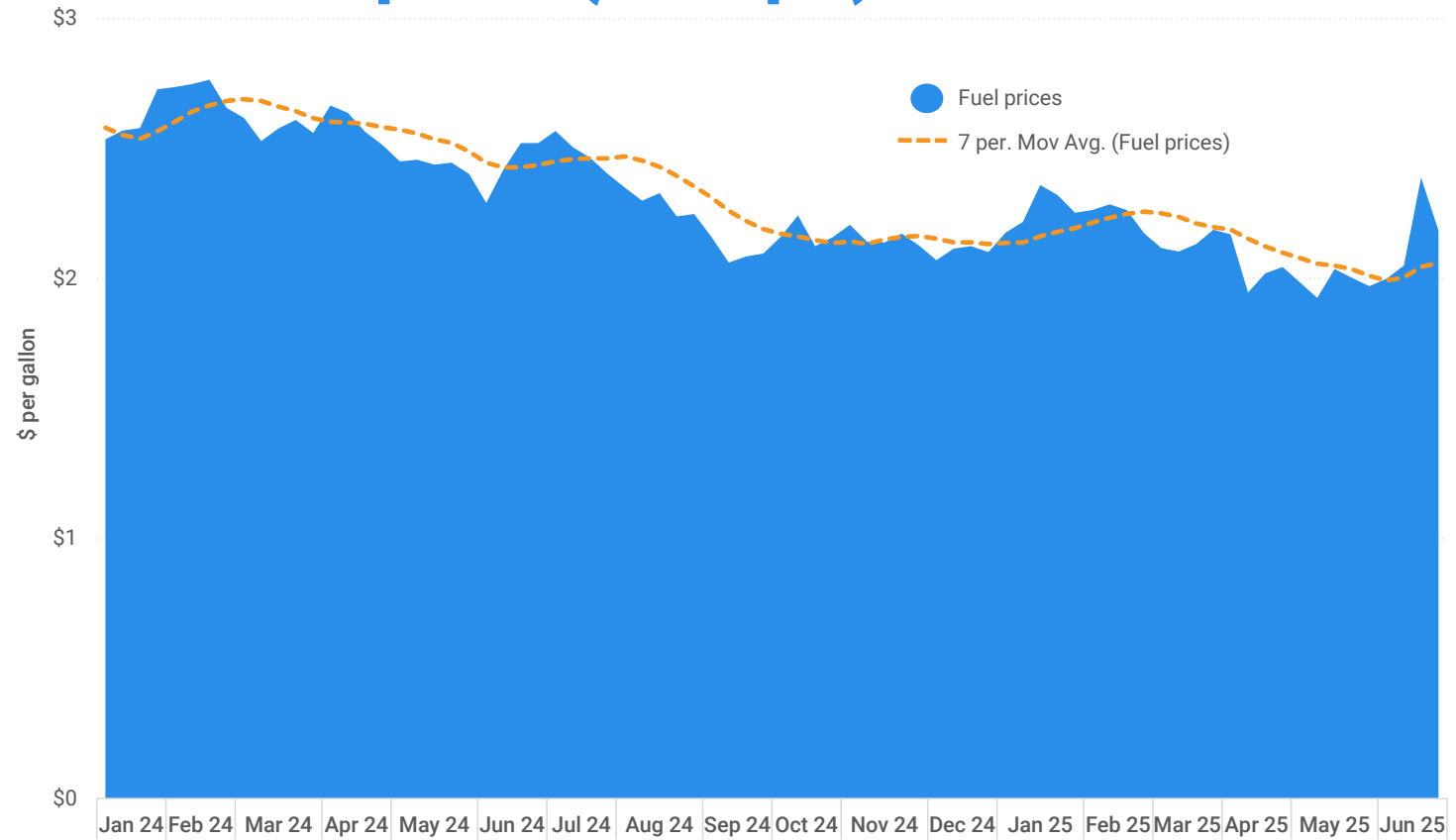
27 Jun 2025
avg fuel price:

\$2.19 /gallon

7%
vs. \$2.05 /gallon
on 13 Jun 2025

Source: IATA/Platts

Jet fuel price (Europe)



Source: IATA/Platts

- ➔ The average price of jet fuel closed at 2.19 USD/gallon on 27 June 2025, corresponding to an increase of 7% on the level recorded two weeks ago. On 20 June 2025, the fuel price reached 2.39 USD/gallon, the highest since the beginning of the year.
- ➔ 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 May 2025, OPEC+ members reconvened to announce that they intend to accelerate oil output hikes, which could bring back to the market as many as 2.2 million barrels per day by November. These gradual increases may however be paused or reversed subject to evolving market conditions. Next OPEC+ meeting is scheduled for 6 July.

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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.



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