



Overview

Traffic: 35,391 daily flights +3% vs 2024	Air traffic flow management (ATFM) delays: 4.9 min/flight (4.0 en-route / 0.9 airport) -25% vs 2024	Arrival punctuality: 68% +6.5pp vs 2024
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The European aviation network demonstrated **improved performance in July 2025** with a **growth in traffic of 3% compared to 2024, but en-route delay down by 31%. En-route delays due to capacity, staffing and weather were down respectively by 39%, 16% and 33%**, demonstrating the benefits of improved planning, coordination and consistent network procedures across the European airspace. However, delays remained above target levels, causing ongoing disruption for passengers and airlines.

The focus must remain on delivering improved August 2025 performance. The EUROCONTROL Network Manager will further strengthen implementation of **network measures, of capacity management scenarios and weather management scenarios** and, in this context, **the proactive support of all ANSPs has been requested.**

Preparation for the 2026 Summer season has already started in order to benefit from the lessons learned from July 2025, with a focus on the same network priorities, but with enhanced attention to:

- **significant enhancements of strategic network measures and procedures, addressing both weather and capacity management,**
- **strategic preparation of the sector opening schemes and related staff availability,**
- **airspace and technological modernisation,**
- **strategic sector capacity increases benefitting from the above.**

Traffic numbers

In July 2025 traffic in the European aviation network was 3% up compared to July 2024, with an average of 35,391 flights per day.

The peak traffic for 2025 was recorded on Friday 18 July, with 37,034 flights, just 194 flights short of the all-time traffic record of 37,228 flights on 28 June 2019.

The traffic increase was particularly significant on the South-East axis (Prague, Bucharest, Malta, Istanbul, Budapest, Vienna all with more than 8% growth) and on the South-West Axis (Agadir, Brest, Canarias and Lisbon) with more than 6% traffic growth.

When comparing to 2019, traffic growth remains uneven, with the ACCs on the South-East and South-West Axes already being significantly above the traffic in 2019.

Delays

Air traffic flow management (ATFM) delays for July 2025 were 5,341,247 minutes, an average of 172,298 minutes per day – 23% below July 2024. ATFM delay is caused when the number of aircraft due to arrive at an airport, or planned to pass through a specific air traffic control sector, exceeds the available capacity as declared by the relevant airport/ANSP, and when the EUROCONTROL Network





Manager will, in order to maintain safety, sequence the traffic by issuing a departure slot, delaying some flights on the ground.

The **total average ATFM delay** per flight decreased by 25% (from 6.5 min/ft in 2024 to 4.9 min/ft in 2025) with a notable decrease of 31% (from 5.7 min/ft to 4.0 min/ft) for en-route ATFM delay.

This improvement compared to 2024 was due, in large part, to improved planning, coordination and consistent weather and capacity management procedures across the European network and between all operational partners. It should be noted that improvements were also achieved despite traffic growth of 3.0% in the number of flights overall.

Some Area Control Centres (ACCs) have substantially reduced en-route ATFM delay, below expected levels. Notable improvements have been seen in Nicosia, Budapest, Rome, Sofia, Milano, Tirana, Zagreb, Sevilla, Bucharest, Lisbon, Padova, Palma, Karlsruhe, Prague, Greek ACCs, Belgrade, Canarias and Geneva ACCs.

However, significant increases of en-route ATFM delay have been recorded in France; these are primarily due to structural shortfalls in capacity.

The network continues to face challenges due to structural capacity and staffing challenges, impact of weather and high traffic growth in parts of the network as well as the impact of the on-going Russian war of aggression in Ukraine.

Weather-related ATFM delay per flight for both en-route and airports (1.8 min/flight) was 26% less than in July 2024. For safety reasons, aircraft avoid convective weather, reducing the number of aircraft flying through the affected airspace. As flights try to re-route into non-weather affected areas, there is a knock-on effect when these other areas are already operating in a saturated environment at the limit of their capacity – resulting in additional ATC capacity delays.

Managing **en-route weather-related delays** has been an area of particular focus this summer. EUROCONTROL as the Network Manager has put in place new processes to ensure a more network-oriented approach to weather management, together with enhanced cross-border collaboration. In July, the scenarios pre-agreed between the ANSPs and the Network Manager (NM) ensured that traffic was moved away from areas of forecast convective weather, increasing stability in the Network and saving 350,000 minutes of delay across the month, 22% of the total en-route weather delay for the month.

En-route ATC capacity delays (where issues are known about in advance) accounted for 1.7 minutes per flight, 34% less than in July 2024. The highest levels of ATC capacity delays have been recorded at Marseille ACC (29% of the ATC capacity delay in the network), Barcelona ACC (14% of the ATC capacity delay in the network) and Karlsruhe UAC (9% of the ATC capacity delay in the network).

En-route ATC staffing, where there are fewer staff available on the day than planned, was 0.53 minutes per flight in July, 16% lower than in July 2024. The highest levels of ATC staffing delays have been recorded at the French ACCs (37% of the ATC staffing delay in the network) and at the Greek ACCs (24% of the ATC staffing delay in the network).

Punctuality

Overall **arrival punctuality for July 2025 was 68%, significantly better than in July 2024 (62%)**. These figures, which indicate the proportion of aircraft arriving no more than 15 minutes behind schedule, reflect the improvements mentioned above and the effective implementation of the 5 network priorities, notably those related to realistic turn around time and schedule and prioritisation of the first rotation of the day.



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July 2025 – Network Performance

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Schedule delays, as experienced by the passenger, are mainly composed of aircraft reactionary (knock-on) delays, airline turnaround (ground handling and passenger boarding) delays as well as ATFM (En-Route and Airport Arrival Regulation, including weather) delays.

The EUROCONTROL Network Manager continues to work intensively with all aviation stakeholders on improving the performance of the European aviation network – and to ensure that passengers get to their destinations safely and with the least possible delay.

Key figures

01 July – 31 July	2023	2024	2025	Change from 2024 to 2025
Traffic (flights)	1,018,890	1,065,757	1,097,110	+3%
Air Traffic Flow Management delay (minutes)	4,231,860	6,947,633	5,341,247	-23%
ATFM total delay/flight (minutes)	4.2	6.5	4.9	-25%
ATFM weather delay/flight (minutes)	1.7	2.4	1.8	-26%
ATFM capacity delay/flight (minutes)	1.2	2.6	1.7	-34%
AFTM staffing delay/flight (minutes)	0.7	0.7	0.5	-19%
Punctuality (arrival)	64%	62%	68%	+6.7pp

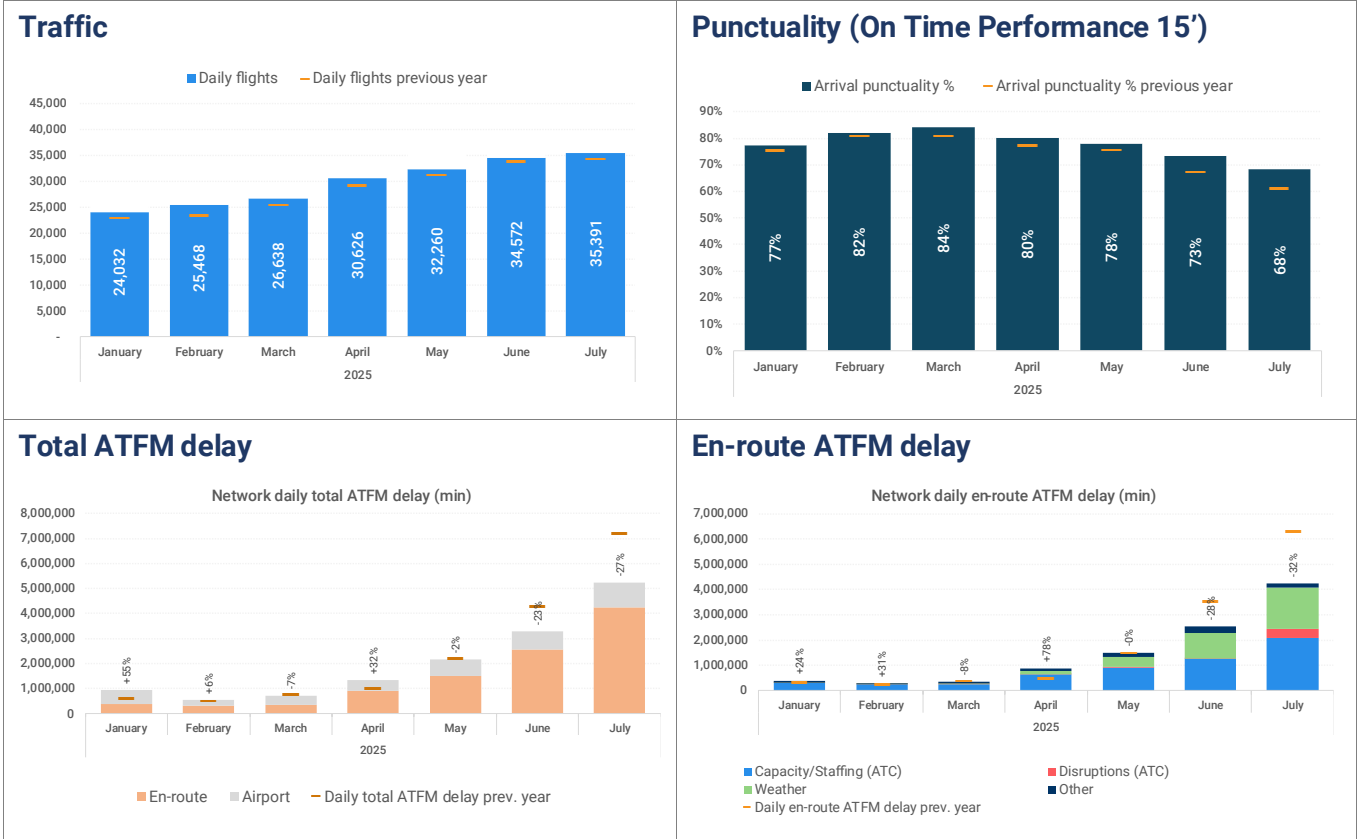
pp: percentage points



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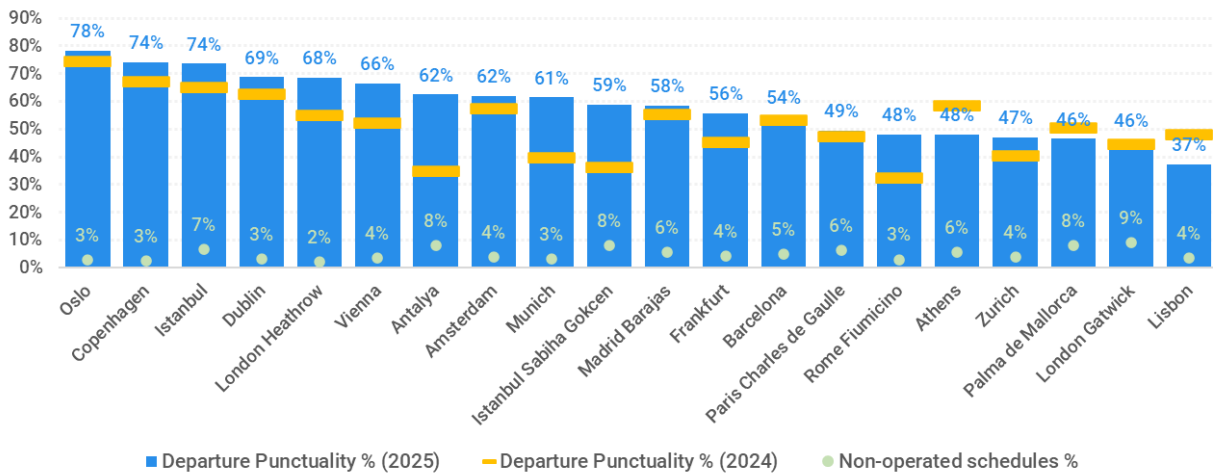
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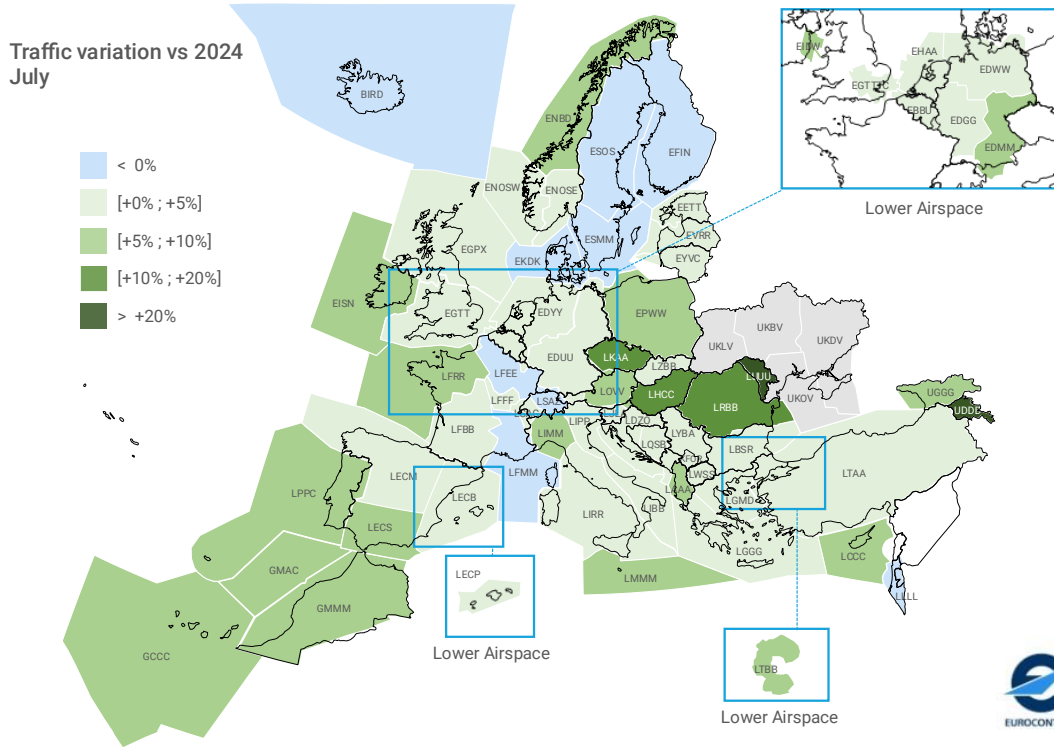


Airports

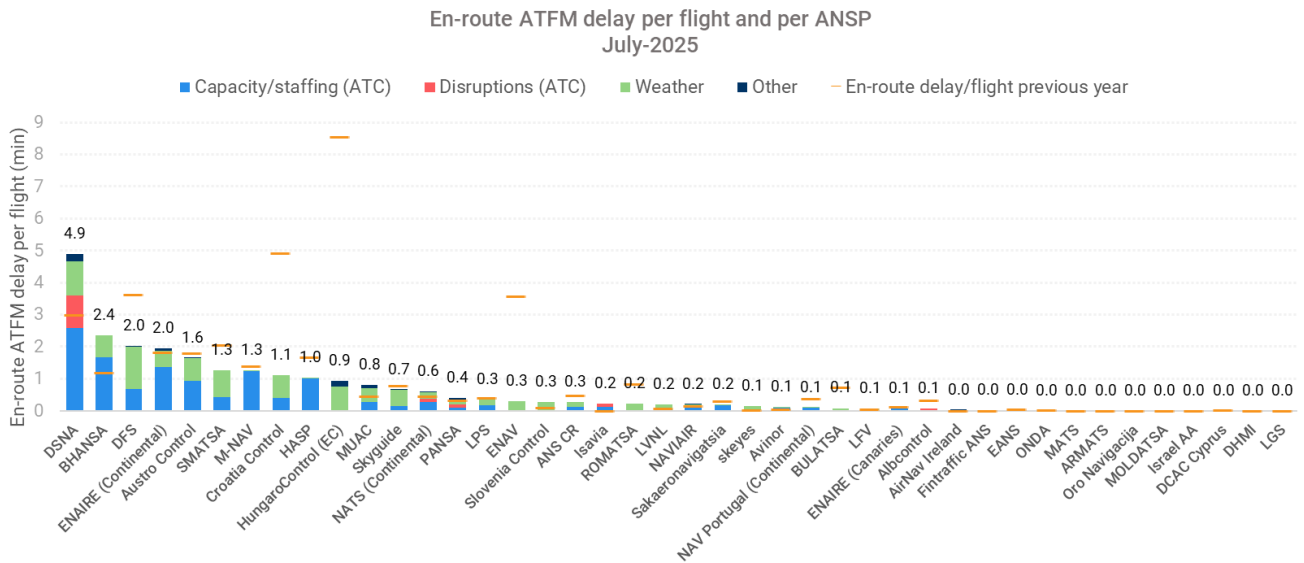
Departure Punctuality % and Non-Operated Schedules % of top 20 European airports
1 - 31 Jul 2025 vs same period of 2024



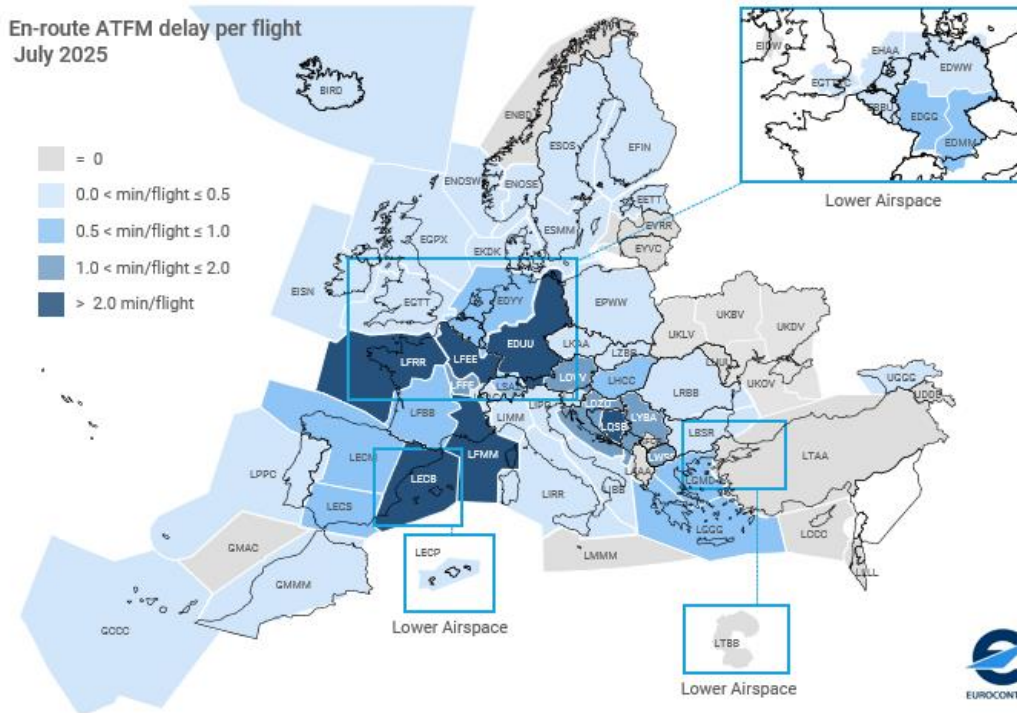
Traffic



En-route ATFM delay per flight and per ANSP



En-route ATFM delay per flight and per ACC



Arrival punctuality and 3 most penalising ATFM locations for the 20 busiest aircraft operators*

Rotation: All		Period: July 2025			
Aircraft operator	Arrival punct (OTP15)	ATFM delay / flight (min)	Most penalising location (ATFM)	2nd most penalising location (ATFM)	3rd most penalising location (ATFM)
SAS Group	81%	3.04	Karlsruhe UAC - 11%	Copenhagen Airport - 10%	Chania Airport - 6%
Iberia Group	81%	4.81	Marseille ACC - 25%	Barcelona ACC - 22%	Brest ACC - 10%
Turkish Airlines Group	76%	2.09	Budapest ACC - 11%	Karlsruhe UAC - 11%	Belgrade ACC - 10%
Norwegian Group	74%	3.90	Brest ACC - 11%	Karlsruhe UAC - 10%	Marseille ACC - 10%
Austrian Airlines	74%	5.95	Vienna Airport - 25%	Vienna ACC - 15%	Karlsruhe UAC - 8%
Vueling	74%	4.93	Marseille ACC - 23%	Barcelona ACC - 15%	Barcelona Airport - 15%
Lufthansa Airlines	70%	4.89	Frankfurt Airport - 17%	Karlsruhe UAC - 11%	Munich ACC - 10%
British Airways Group	70%	6.22	Brest ACC - 12%	Heathrow Airport - 11%	Reims ACC - 10%
Wizz Air Group	69%	7.02	Marseille ACC - 15%	Karlsruhe UAC - 10%	Vienna ACC - 10%
Air France Group	68%	5.74	Marseille ACC - 24%	Paris ACC - 21%	Paris CdG Airport - 5%
KLM Group	68%	5.91	Amsterdam Airport - 37%	Karlsruhe UAC - 9%	Brest ACC - 9%
TUI Group	66%	8.48	Brest ACC - 10%	Karlsruhe UAC - 9%	Reims ACC - 8%
Pegasus	66%	2.94	Karlsruhe UAC - 14%	Belgrade ACC - 10%	Budapest ACC - 10%
SWISS Group	66%	5.74	Zurich Airport - 22%	Marseille ACC - 14%	Karlsruhe UAC - 10%
Ryanair Group	63%	6.45	Marseille ACC - 21%	Barcelona ACC - 11%	Brest ACC - 10%
Eurowings Group	62%	9.07	Marseille ACC - 18%	Karlsruhe UAC - 15%	Vienna ACC - 7%
ITA Airways	61%	2.29	Marseille ACC - 16%	Karlsruhe UAC - 8%	Paris ACC - 8%
AEGEAN Group	60%	4.25	Athens Airport - 37%	Athens ACC - 6%	Makedonia ACC - 5%
easyJet Group	60%	8.38	Marseille ACC - 25%	Brest ACC - 8%	Reims ACC - 7%
TAP Group	53%	5.97	Marseille ACC - 22%	Brest ACC - 14%	Lisbon Airport - 13%

* Aircraft operator groups in the table above are defined @

<https://www.eurocontrol.int/directory/airline-groups-lookup>



Background information

ANSPs are responsible for air traffic control (ATC) and provide EUROCONTROL with an overview of the number of ATC sectors they have available, and the number of aircraft they can safely handle at any one time in those sectors. Airlines provide EUROCONTROL with their flight plans, indicating where they plan to fly. If more aircraft are planned to be in any one area than can safely be handled, EUROCONTROL works with the ATC centre, the airlines and other operational partners to try and find the best solution. Solutions include, for example, re-routing flights or opening additional airspace. In some cases, to avoid an unsafe situation where there are too many aircraft expected at the same time in an ATC sector, EUROCONTROL will issue a departure slot delaying the flight on ground.

In an effort to keep delays as low as possible during summer 2025, the EUROCONTROL Network Manager has put in place a daily coordination mechanism with all partners in the European air traffic network. The aim is to try and reconcile demand from airlines for flights with available capacity in ACCs and on the ground. Part of this planning process includes jointly establishing a strategic planning document, the Network Operations Plan (NOP). The NOP looks eight weeks ahead and provides a planning overview with the aim of minimising disruption and maximising performance at all times based on the resources available.

The EUROCONTROL Network Manager has also put in place a campaign - #thinkNetwork - calling on all operational stakeholders to work together to make the summer as efficient as possible for the travelling public. The campaign focuses on five areas of action: delivering agreed capacities, minimising the impacts of adverse weather, prioritising first rotation, filing realistic flight plans – and sticking to them and ensuring that flight schedules are realistic.

With traffic expected to continue to grow in the medium and longer term, additional measures will be needed to address the structural issues in the European air traffic network. These include accelerating air traffic controller recruitment by the responsible national authorities, airspace changes as well as the implementation of innovative technologies.

