

# Special #FlashBriefing:

Overview of the performance of the European aviation network in Summer 2025 (June-August)



## Headline Summer 2025 numbers

<b>Summer traffic:</b> 35,122 average daily flights +3% vs 2024 +1% vs 2019	<b>Summer air traffic flow management (ATFM) delays:</b> 3.9 min/flight (3.1 en-route / 0.8 airport) -27% vs 2024 +8% vs 2019	<b>Summer arrival punctuality:</b> 71% +6.5pp vs 2024 -1.5pp vs 2019
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The European aviation network demonstrated **improved performance over the period June-August 2025 compared to the previous summer**, with year-on-year **traffic growth of 3%** (in line with the STATFOR baseline scenario at network level, but with some significant regional differences), and a **reduction in en-route delays of 34%**. These were down in all delay categories: a **30%** improvement in capacity delays, **22%** in staffing, and a significant **43%** fewer weather delays. Overall, summer performance proved better than expected from an operational point of view, which demonstrates the clear operational benefits of improved planning, coordination and consistent network procedures being applied across European airspace by the EUROCONTROL Network Manager (NM) and operational actors, and further amplified by support from national governments and authorities.

However, **delays remain high and above the target levels**, which clearly highlights the ongoing structural lack of capacity (largely driven by a lack of air traffic controllers (ATCOs) in some ANSPs, and the ongoing need to improve airspace design and accelerate technological modernisation). These delays continue to impact negatively passengers and airlines, and this once again **underlines that all actors still have plenty to do to tackle system congestion for next summer, and for the coming years** in order to meet network capacity needs as traffic continues to grow. **The EUROCONTROL NM, in partnership with all operational stakeholders, is now focusing collective efforts on delivering improved 2026 performance, taking full benefit from the lessons learnt during Summer 2025.**

**Preparations for the Summer 2026 season have already started** with particular focus on maintaining network stability and predictability. NM will accordingly be working with all operational stakeholders to build on the priorities of 2025 and the lessons learnt, paying special attention to:

- **Significant enhancements of strategic network measures and procedures, addressing both weather and capacity management**
- **Early preparation and full commitment to the implementation of the Network Operations Plan**
- **Preparation of optimum sector opening schemes and related staff availability,**
- **Improved rostering and continuous ATCO recruitment**
- **Airspace modernisation, including implementation of sectorisation changes to better manage demand**
- **Acceleration of ATM system modernisation and digitalisation, including increased utilisation of datalink and further capacity increases based on this**
- **Tangible sector capacity increases, benefitting from all the above.**



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## Traffic numbers

Summer traffic in 2025 in the European aviation network was **3% up** compared to Summer 2024, with an average of **35,122 flights per day**, and **+1%** vs pre-pandemic Summer 2019.

The **busiest day** in 2025 was Friday 18 July with **37,037** flights, just 191 flights short of the all-time traffic record of 37,228 flights set on 28 June 2019. However, Summer 2025 set two other network records: the **busiest Saturday and Sunday ever** in Week 33 (04-10 August) with **33,987** and **35,009** flights respectively, and the **busiest week ever** in Week 35 (25-31 August), with **250,291** total flights, an average of 35,756 daily flights.

Throughout June to August 2025, **year-on-year traffic increases of more than 5%** were recorded across the South-East axis (in particular for the air navigation service providers (ANSPs) of Albania, Armenia, Austria, Bosnia-Herzegovina, Croatia, Cyprus, the Czech Republic, Hungary, Malta, Moldova, North Macedonia, Romania, Slovenia and Türkiye; and the Milano, Munich and Padova Area Control Centres (ACCs)), and on the South-West axis (the ANSPs of Ireland, Morocco and Portugal; and the Brest, Canarias and Sevilla ACCs).

Overall, **year-to-date traffic** compared to 2024 currently stands slightly higher than the 3% summer traffic increase at **+4%**, in line with the STATFOR base forecast at network level, but with some significant regional differences, and is just short of pre-pandemic 2019 (**-1%**).

## Delays

**ATFM delays** for Summer 2025 amounted to 12,742,882 minutes, an average of 138,510 minutes per day – which is **27% below** the levels recorded in Summer 2024. ATFM delays are caused when the number of aircraft due to arrive at an airport, or planned to pass through a specific air traffic control (ATC) sector, exceeds the available capacity as declared by the relevant airport/ANSP, and when NM will, in order to maintain safety, sequence traffic by issuing a departure slot, delaying some flights on the ground.

The **total average ATFM delay per flight decreased this summer** from 5.4 min/flt in 2024 to 3.9 min/flt in 2025, with en-route ATFM delay notably decreasing by **32%** (from 4.6 min/flt to 3.1 min/flt), which is equal to the delay in 2019. The decrease reflects significant efforts by many ANSPs to increase their operational readiness and execute the summer Network Operations Plan (NOP) effectively. Notable improvements were made by the ANSPs of Albania, Austria, Bulgaria, Croatia, the Czech Republic, Germany, Greece, Italy, Hungary, Portugal, Romania and Switzerland; and by Beograd, Canarias and Sevilla ACCs.

To put that into perspective, year-to-date en-route ATFM delay (i.e. including the summer) currently stands at 1.84 minutes per flight and is projected to fall to approximately 1.6 minutes by the end of the year. However, this predicted end point, while also closely mirroring 2019 en-route ATFM delay, is still set to be well above the EU-wide target of 0.9 minutes for 2025.

The number of **days with over 200,000 minutes of ATFM delay** dropped significantly, from 33 such days in Summer 2024 to **15** this year. Of these, **only one day saw more than 300,000 minutes of delay**, which occurred on 3 July due to industrial action in France.

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In terms of **network hotspots**, eight ANSPs recorded over 1 minute per flight of en-route ATFM delay over the summer, with the highest five as follows:

- DSNVA with 3.6 min/flight, well over half of that reflecting ongoing ATC capacity/staffing issues, with bad weather the next largest component, plus a smaller proportion reflecting the above-mentioned days of strike action
- BHANSA with 1.7 min/flight, the largest part of that driven by ATC capacity/staffing issues, with much of the rest due to bad weather
- DFS with 1.6 min/flight, where bad weather made up the majority of delays, with a smaller component due to ATC capacity/staffing issues
- ENAIRE (Continental) with 1.6 min/flight, the largest part of that driven by ATC capacity/staffing issues, with much of the rest due to bad weather
- HASP with 1.5 min/flight, the largest part of that driven by ATC capacity/staffing issues, with much of the rest due to bad weather.

The next three ANSPs were all over 1 min/flight, namely MNAV (1.4: mostly ATC staffing/capacity), SMATSA (1.2, well over half weather-driven with smaller components reflecting ATC disruption and ATC capacity/staffing) and Austro Control (1.1: slightly over half weather-related with the rest down to ATC capacity/staffing).

23 ANSPs had en-route ATFM delays of between 0.9 and 0.1 min/flight, while 11 had zero flight delays when rounded to 1 decimal place.

These improvements compared to 2024 were largely due to improved planning, full commitment by all operational actors to implementing the Network Operations Plan, and strong coordination between all operational partners, including the application of consistent weather and capacity management procedures across the European network. Moreover, it is important to underline that **these improvements were achieved despite traffic growth of 3.0%** in the number of flights overall, which reflects the increasing robustness of the network.

Levels of delay still remain high however and above the European-wide targets, due to a combination of factors including structural capacity shortfalls (notably in France), significant convective weather across the network this summer (thunderstorms, etc.), as well as less airspace available for re-routings due to the ongoing Russian war of aggression in Ukraine.

**Weather-related ATFM delay per flight for both en-route and airports** (1.4 min/flight) was **37% less** than during Summer 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** was an area of particular focus this summer. EUROCONTROL as the NM put in place new processes to take a more network-oriented approach to weather management, together with enhanced cross-border collaboration. During the period June-August, the scenarios pre-agreed between the ANSPs and NM ensured traffic was moved away from areas of forecasted convective weather, increasing stability in the network and **saving at least 720,000 minutes of delay** across the summer, **17%** of the actual en-route weather delay for the season.

**ATC capacity delays** (where issues are known in advance) accounted for 1.4 minutes per flight, **-25%** vs Summer 2024. The highest levels of ATC capacity delays were at Barcelona and Marseille ACCs, and Karlsruhe Upper Area Centre (UAC).



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**ATC staffing**, where there are fewer staff available on the day than planned, accounted for 0.4 minutes per flight, **25% lower** than in Summer 2024. The highest levels of ATC staffing delays were recorded at the French and Greek ACCs.

## Punctuality

Overall **arrival punctuality in Summer 2025 stood at 71%, significantly better than in the previous summer (65%)**. The improvement in this figure, which indicates the proportion of aircraft arriving no more than 15 minutes behind schedule, reflects the improvements mentioned above, and testifies to the successful implementation of NM's **#thinkNetwork** campaign and its five network priorities for operational actors to follow in Summer 2025, notably those related to realistic turnaround times and scheduling, and prioritising the first rotation of the day.

Schedule delays, i.e. those 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 Regulations, including weather) delays.

The EUROCONTROL NM 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.

## Background

*ANSPs are responsible for 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 the ground.*

*In an effort to keep delays as low as possible during Summer 2025, NM put in place a daily coordination mechanism with all its operational network partners. The aim of this was to try and reconcile demand from airlines for flights with available capacity in ACCs and on the ground.*

*Part of this planning process included jointly establishing the Network Operations Plan as a strategic planning document. The Network Operations Plan 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; throughout the summer, this was complemented by weekly **#FlashBriefings** reporting on the performance of the week past, and the capacity outlook ahead.*

*NM's 2025 **#thinkNetwork** campaign called on all operational stakeholders to work together to make the summer as efficient as possible for the travelling public. The campaign focused 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. These priority strands will now be assessed, and lessons learnt built into the design of next year's summer measures.*



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Summer 2025 also benefited from stable datalink operations with no failures, despite increased usage. The focus in 2026 will be on further increased usage and more tangible capacity increases related to datalink.

In parallel, 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, making airspace changes as well as implementing innovative technologies.

## Key figures

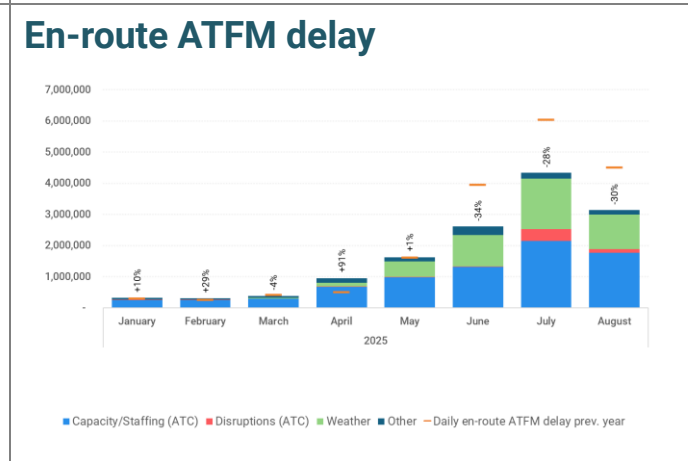
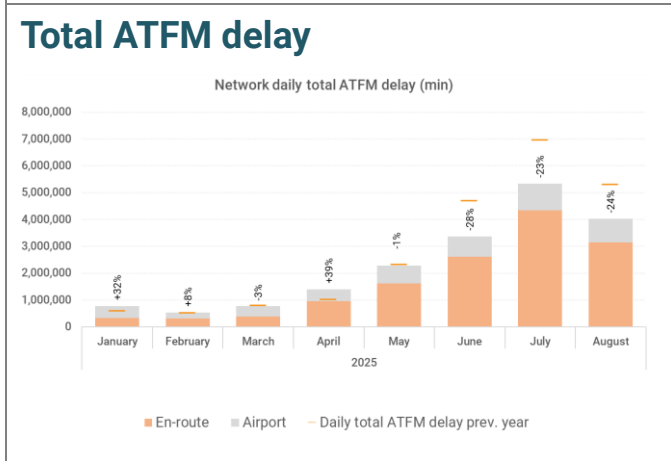
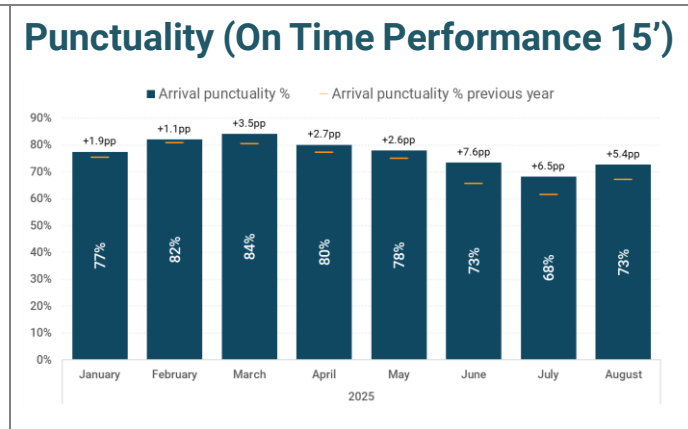
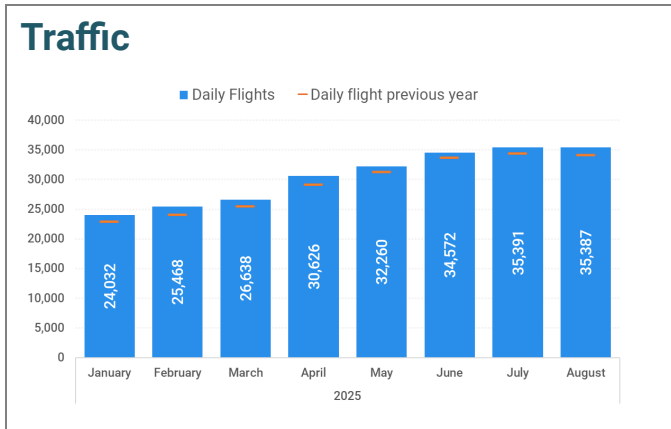
01 June – 31 August	2023	2024	2025	Change from 2024 to 2025
Traffic (flights)	2,989,583	3,131,864	3,231,264	3%
Air Traffic Flow Management delay (minutes)	11,453,986	16,949,976	12,742,882	-25%
ATFM total delay/flight (minutes)	3.8	5.4	3.9	-27%
ATFM weather delay/flight (minutes)	1.6	2.2	1.4	-37%
ATFM capacity delay/flight (minutes)	1.0	1.9	1.4	-25%
AFTM staffing delay/flight (minutes)	0.5	0.6	0.4	-25%
Punctuality (arrival)	66%	65%	71%	6pp

pp: percentage points



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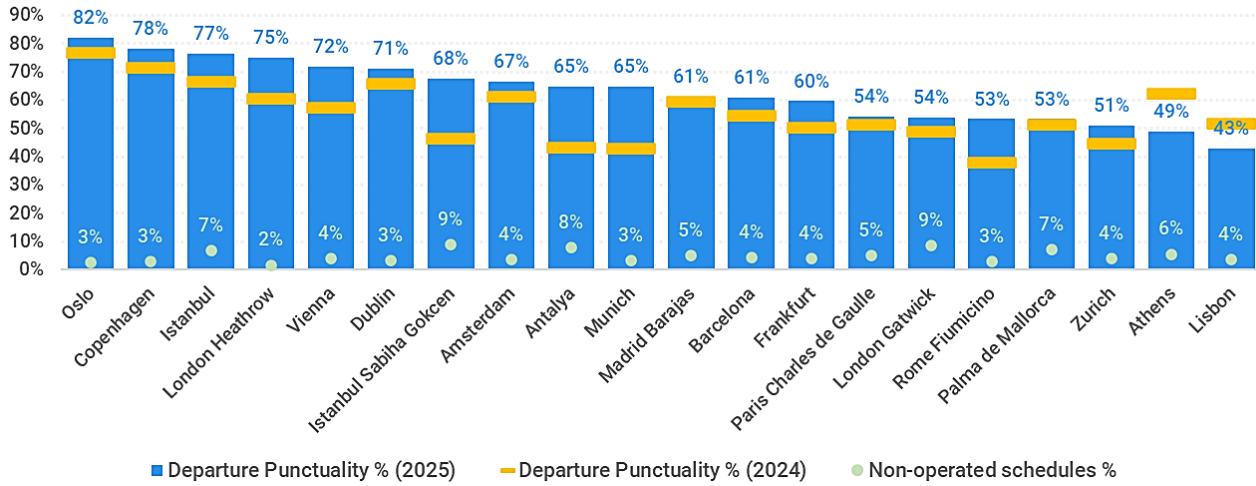
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## Airports

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







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

Aircraft operator	Arrival punct (OTP15)	Rotation: All ATFM delay / flight (min)	Period: June - August 2025 Most penalising location (ATFM)	2nd most penalising location (ATFM)	3rd most penalising location (ATFM)
SAS Group	85%	1.97	Karlsruhe UAC - 11%	Copenhagen Airport - 10%	Chania Airport - 7%
Iberia Group	83%	3.74	Barcelona ACC - 23%	Marseille ACC - 22%	Madrid ACC - 8%
Vueling	80%	3.74	Marseille ACC - 21%	Barcelona ACC - 16%	Barcelona Airport - 15%
Turkish Airlines Group	80%	1.69	Belgrade ACC - 12%	Budapest ACC - 11%	Karlsruhe UAC - 10%
Austrian Airlines	80%	4.47	Vienna Airport - 20%	Vienna ACC - 14%	Karlsruhe UAC - 9%
Norwegian Group	79%	2.92	Marseille ACC - 10%	Karlsruhe UAC - 9%	Brest ACC - 9%
British Airways Group	74%	4.63	Reims ACC - 12%	Marseille ACC - 9%	Brest ACC - 9%
Pegasus	74%	2.26	Karlsruhe UAC - 13%	Belgrade ACC - 12%	Budapest ACC - 10%
Lufthansa Airlines	74%	3.88	Frankfurt Airport - 14%	Munich ACC - 11%	Karlsruhe UAC - 11%
KLM Group	72%	5.06	Amsterdam Airport - 40%	Reims ACC - 8%	Karlsruhe UAC - 8%
Air France Group	72%	4.35	Marseille ACC - 22%	Paris ACC - 18%	Paris CdG Airport - 5%
Wizz Air Group	72%	5.32	Marseille ACC - 13%	Belgrade ACC - 10%	Karlsruhe UAC - 10%
SWISS Group	69%	5.25	Zurich Airport - 27%	Marseille ACC - 14%	Karlsruhe UAC - 7%
TUI Group	68%	7.20	Reims ACC - 10%	Karlsruhe UAC - 9%	Athens ACC - 9%
Ryanair Group	68%	4.87	Marseille ACC - 18%	Barcelona ACC - 11%	Karlsruhe UAC - 7%
ITA Airways	66%	1.92	Marseille ACC - 17%	Reims ACC - 7%	Karlsruhe UAC - 7%
Eurowings Group	66%	7.11	Marseille ACC - 17%	Karlsruhe UAC - 15%	Reims ACC - 6%
easyJet Group	65%	6.77	Marseille ACC - 24%	Reims ACC - 10%	Brest ACC - 6%
AEGEAN Group	61%	4.18	Athens Airport - 39%	Athens ACC - 9%	Makedonia ACC - 8%
TAP Group	58%	4.82	Marseille ACC - 19%	Lisbon Airport - 15%	Brest ACC - 11%

\* Aircraft operator groups in the table above are defined @

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

