# Monthly Network Operations Report

Overview October 2025

# 1. Summary

There were 1,007,906 flights in October, representing a 5.2% increase in traffic compared to October 2024. With the start of the winter schedule on the last Sunday of October, traffic decreased as expected compared to September 2025.

The conflict in Ukraine still affects overflights in several countries. EUROCONTROL continues to help manage the war's impact on aviation.

The network had an average of 32,516 flights/day in October, about 1,500 flights/day more than in October 2024. The busiest day was Friday 10 October (34,828 flights). The intra-NM southeast axis saw a 6.6% traffic increase while the intra-NM southwest axis saw a 2.8% growth, contributing to the overall network growth of 5.2%.

In October 2025, total flights reached 102.6% of pre-pandemic levels. The overall recovery remains strong with 67% of countries exceeding their October 2019 flights levels. The strongest growth was recorded in Georgia (+124%), Armenia (+120%) and Albania (+90%) while countries such as Germany, Netherlands, Norway, Denmark, Sweden, Finland and the Baltic countries remain 7-23% below their October 2019 levels.

In October 2025, all Top 20 ACCs except Reims (-4.2%) recorded an increase in traffic, with Ankara, Sofia, Budapest and Vienna still experiencing double-digit growth.

The Top 5 aircraft operators remained the same as in September 2025. Ryanair was the busiest operator with, on average, 3,517 movements (+4.4%) per day followed by easyJet (1,790), Turkish Airlines (1,657), Air France (1,108) and Lufthansa (1,096). Seven of the top 20 aircraft operators experienced a double-digit traffic growth compared to the same period in 2024: Turkish Airlines, Wizz Air, Scandinavian Airlines, Eurowings, Pegasus, Aegean Airlines and Sunexpress.

Istanbul (1,546 flights/day) was the busiest airport followed by Amsterdam Schiphol (1,399 flights/day), Frankfurt Main (1,370 flights/day), Paris Charles de Gaulle (1,343 flights/day), and London Heathrow (1,335 flights/day). All Top 20 airports, except London Gatwick, saw increased traffic compared to October 2024. Turkish airports such as Istanbul, Istanbul Sabiha Gökçen and Antalya saw a double-digit traffic increase.

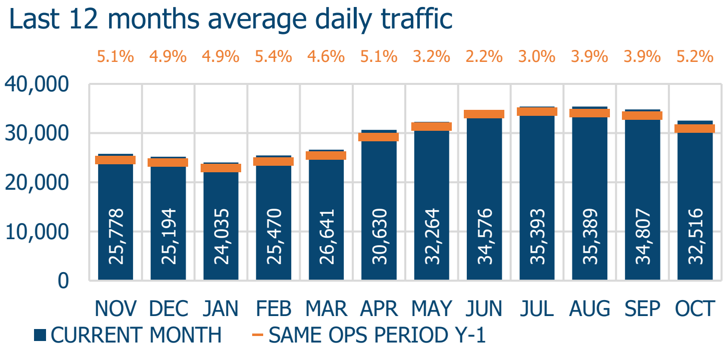
Network departure punctuality was at 69.8% and arrival punctuality was 74.3%, both better than in October 2024. Departure punctuality on the intra NM southwest axis was better than in October 2024 (+ 2.3 p.p.), it slightly increased (+0.6 p.p.) on the intra NM southeast axis despite a 6.6% increase in traffic. Network first rotation departure punctuality was 80.8%, which is 0.9 p.p. higher than 2024, and arrival punctuality increased by 1.2 p.p. Improving first rotation punctuality remains a key objective for the Network Manager (NM). The network saw better performance in October 2025, long arrival delays remained stable compared to last year with 6 days seeing peaks (of >15%) in delays over 30 mins.

There were 2,2 million minutes of ATFM delay in October 2025, an increase of 1.1% compared to October 2024, largely due to an increase of ATC capacity issues in both en-route and airports. En-route ATFM delay represented 64.0% of total ATFM delay and airport was 36.0%. The average en-route ATFM delay per flight for the network was 1.4 minutes in October – stable compared to October 2024 (1.5 minutes). The YTD en-route delay was 1.9 minutes, lower than in 2024. Total en-route ATFM delays decreased by 1.0% and total airport ATFM delays increased by 4.9% in October. En-route ATC capacity was the main concern, with a greater impact than in 2024. Marseille ACC continued to generate significant en-route ATFM delays, particularly in the Eastern Sector Group, where limited sector availability prompted notable capacity and staffing delays.

NM's Operational Centre reduced en-route ATFM delays by 10.6% and airport ATFM delays by 8.0% through direct actions and by using route restrictions to mitigate the potential impact of adverse weather.

NM estimates that 3.4 million tonnes of fuel were burnt in the en-route flight phase in the NM area in October 2025, an increase of 0.4 million tonnes from October 2024, alongside a 5.2% rise in traffic.

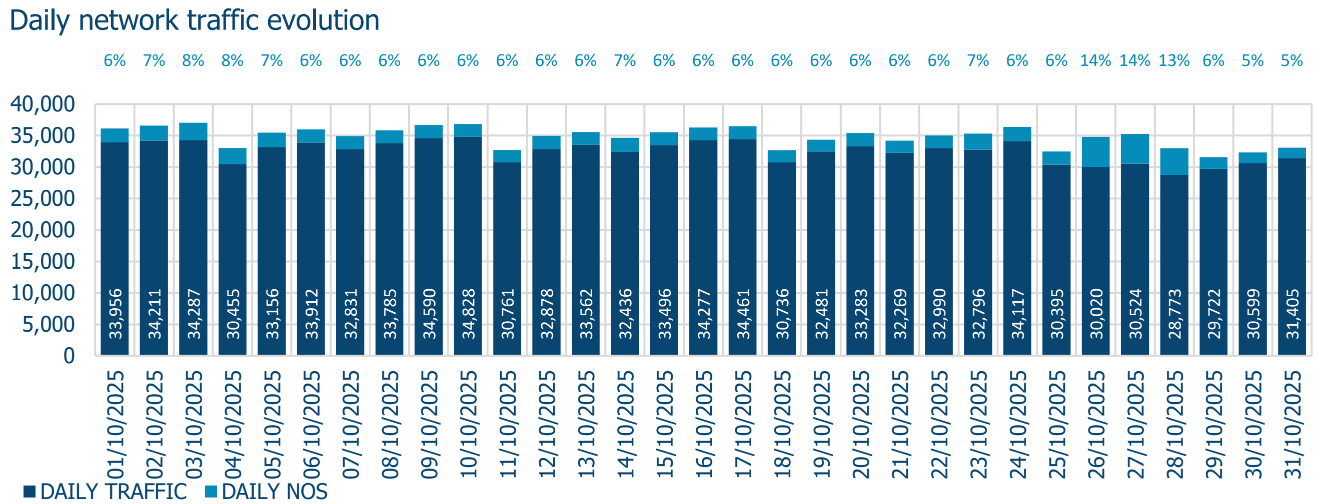
# 2. Traffic evolution




There were 1,007,906 flights throughout Europe in October 2025, 5.2% up compared to the same period last year.

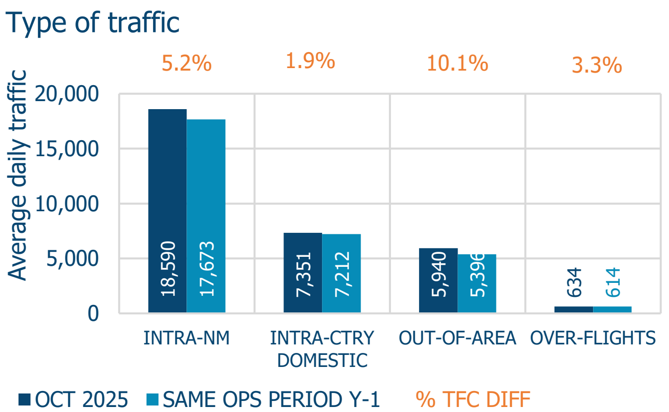
In October 2025, the Low-cost segment was the primary contributor to total flight growth, adding 1,051 flights per day (+9.6%) to the NM area compared to October 2024. The Mainline segment saw a smaller increase of 303 flights per day (+2.8%) while the Regional segment recorded 58 fewer flights per day (-1.5%). The Charter segment added 11 daily flights (+1.1%). All-Cargo increased by 0.4% while Business aviation added 70 daily flights (+3.4%) in October 2025 vs October 2024. Overall total flights in October 2025 exceeded pre-pandemic levels, reaching 102.6% of 2019 levels with two market segments exceeding 2019: Low-cost (+20.4%) and Business aviation (+12.2%).

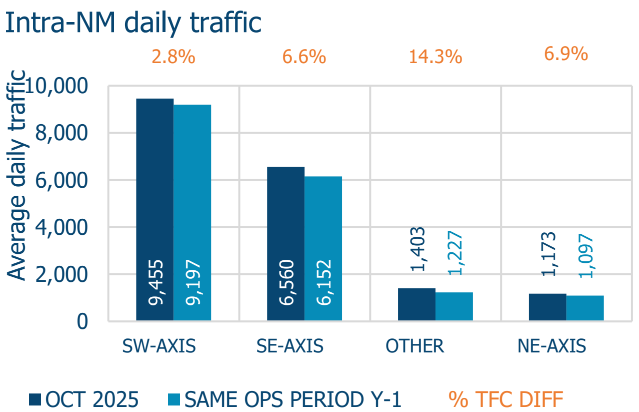
The busiest day was Friday 10 October (34,828 flights).



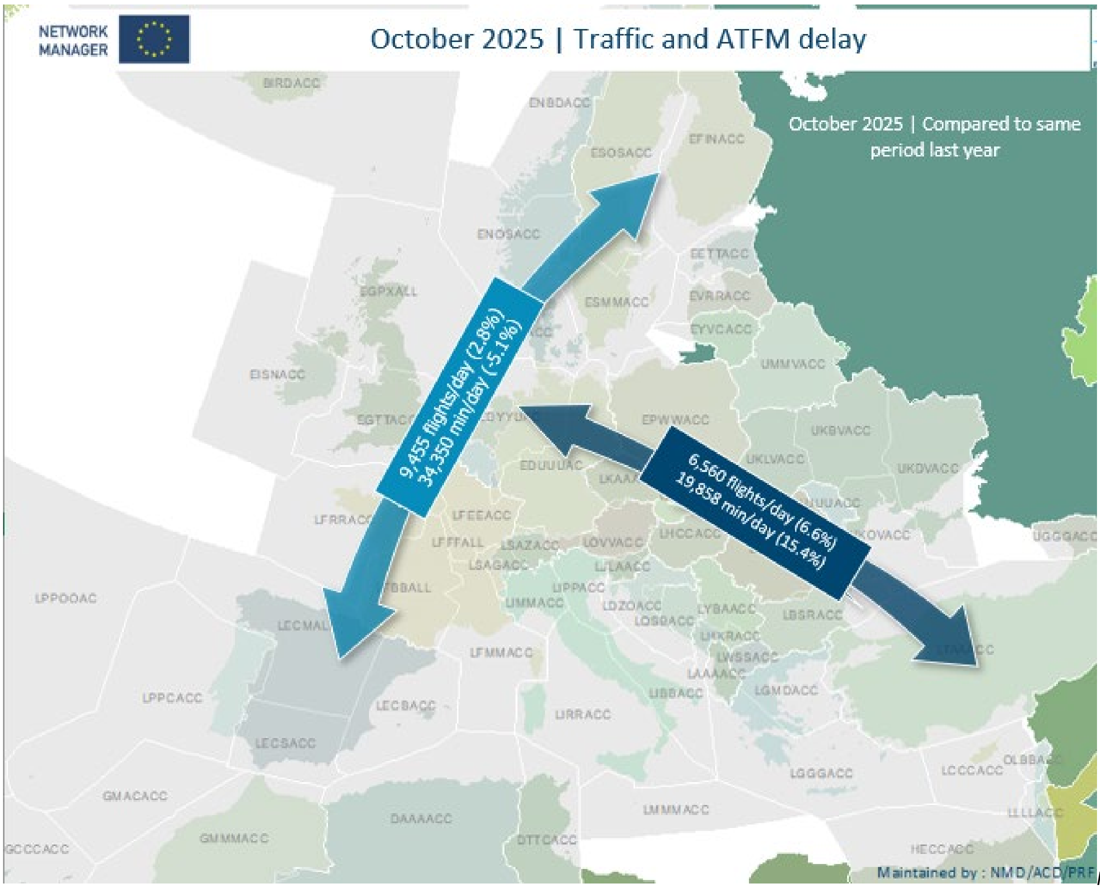

On average, 6.9% of scheduled traffic did not operate in October (see Non-Operated Schedules).

The percentage increase between 26 and 28 October was due to the switch from IATA summer to winter season.



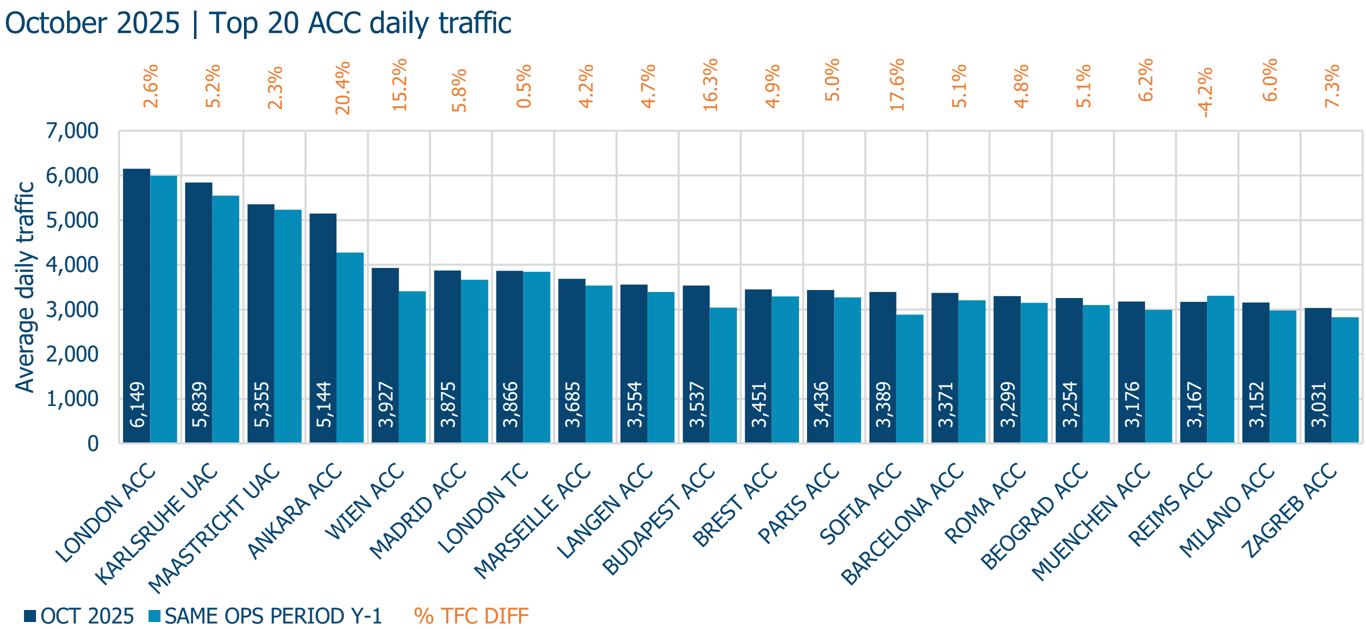



The intra-NM southeast axis saw a 6.6% traffic increase while the intra-NM southwest axis saw a 2.8% growth, contributing to the overall network growth of 5.2%.



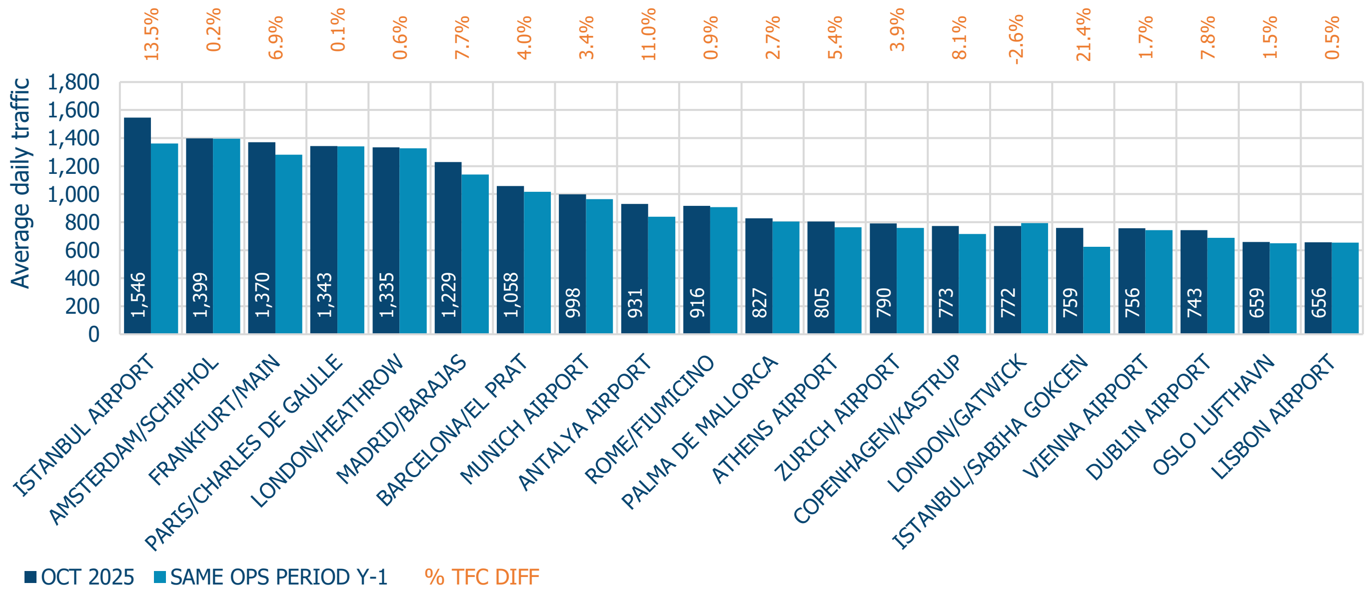

*Please note that Iceland joined the NM area on 01-January 2025, which has had a modest affect on the categorisation between 'Intra-NM, Out-of-Area and Over-Flights. The designations employed do not imply the expression of any opinion whatsoever on the part of EUROCONTROL concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries*

*Percentages represent the difference in daily traffic and en-route ATFM delay compared to the same period last year.*




London ACC was the busiest ACC followed by Karlsruhe UAC, Maastricht UAC, Ankara and Vienna ACCs. Reims was the only ACC in the Top 20 to see a decrease in traffic (-4.2%), while Ankara, Sofia, Budapest and Vienna experienced a double-digit traffic growth. The 15.2% traffic growth in Vienna ACC was partly accounted for by the relaxation of route restrictions which had previously been protecting Karlsruhe UAC Sector Group South and traffic shifting due to new route charges in nearby ACCs. The increase in Ankara was attributed to a higher volume of traffic and rerouting due to Middle East crisis. Budapest and Sofia traffic increase was partially due to the rerouting of flights from the ongoing conflict in Ukraine.

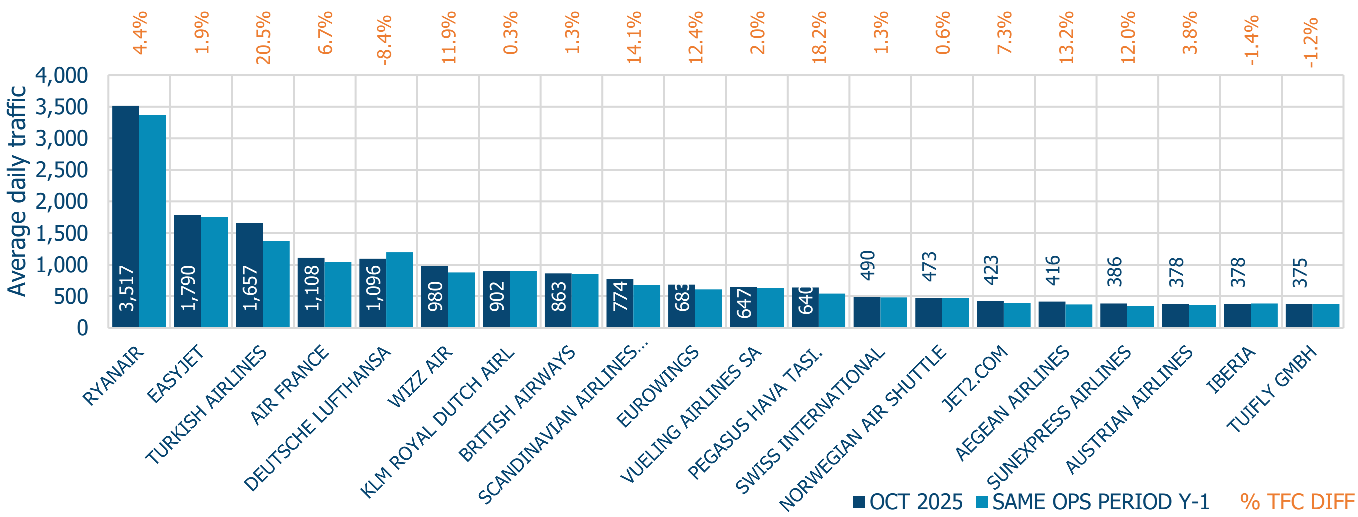
## October 2025 | Top 20 Airports daily traffic




The busiest airport was Istanbul airport (1,546 flights/day) followed by Amsterdam Schiphol (1,399 flights/day), Frankfurt Main (1,370 flights/day), Paris Charles de Gaulle (1,343 flights/day), and London Heathrow (1,335 flights/day).

All Top 20 airports, except London Gatwick, saw increased traffic compared to October 2024. Turkish airports such as Istanbul, Istanbul Sabiha Gökçen and Antalya saw a double-digit traffic increase. The largest increases took place at Turkish airports such as Istanbul, Istanbul Sabiha Gökçen and Antalya driven by strong passenger demand in Türkiye.

## October 2025 | Top 20 Air Operator groups daily traffic



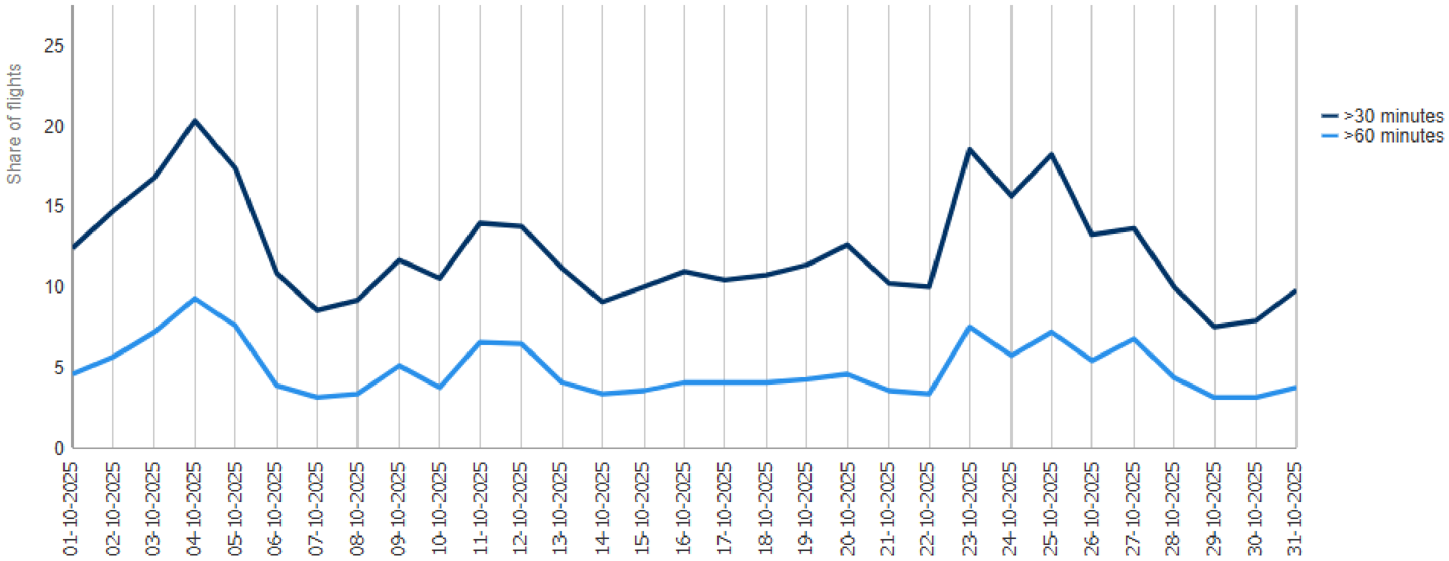

Ryanair was the busiest operator with, on average, 3,517 movements per day, followed by easyJet (1,790), Turkish Airlines (1,657), Air France (1,108) and Lufthansa (1,096).

Turkish Airlines, Wizz Air, Scandinavian Airlines, Eurowings, Pegasus, Aegean and SunExpress had double-digit growth compared to October 2024. Turkish Airlines reported a strong traffic growth in international routes such as Istanbul to New York. Pegasus expanded its route network, adding new destinations and increasing flight frequencies on popular routes. SunExpress added 15 new international routes for Summer 2025, nearly doubling its seat capacity compared to pre-pandemic levels. Scandinavian Airlines saw increased traffic mainly due to domestic growth in Sweden, the opening of 28 new routes and fleet modernisation.

Lufthansa, Iberia and TUIFly operated fewer flights. Lufthansa's traffic declined partly due to reduced demand for US flights.

# 3. Punctuality

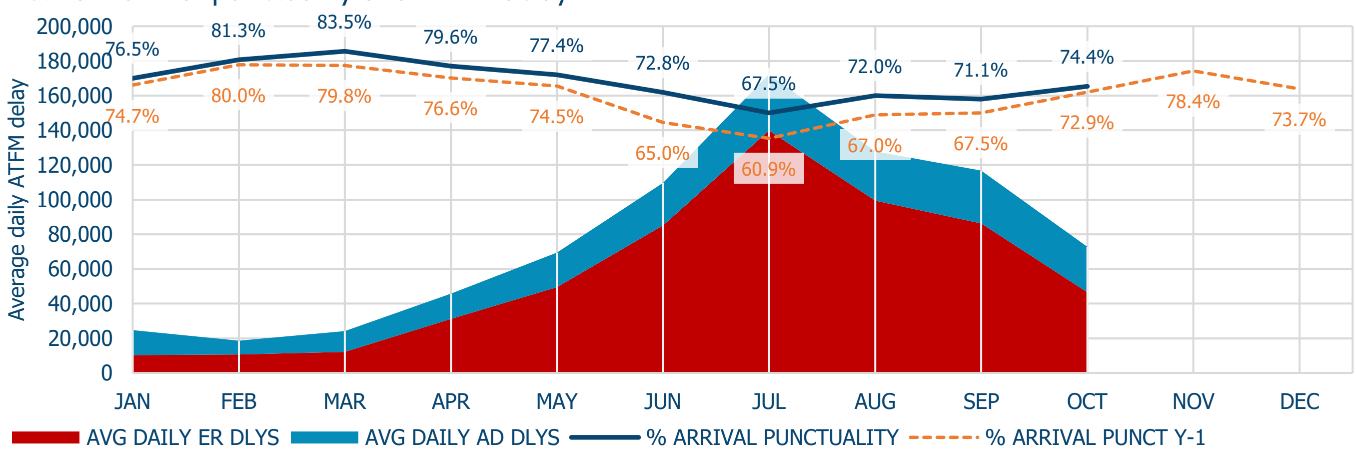
Percentage of long delays on arrival (vs the scheduled time)




The graph above shows the daily evolution of longer delays (>30 and >60 mins) on arrival versus Scheduled Time of Arrival. In general, long arrival delays for the month fell, however 6 days did see peaks (of >15%) in delays over 30 mins, this was the same as October 2024. The 04 and 05 October saw high weather delays, notably in Amsterdam Schiphol and London Heathrow. Then towards the end of the month between 23-25 October where Amsterdam Schiphol and Vienna saw poor weather days.

## 3.1 Arrival Punctuality

Network arrival punctuality and ATFM delay

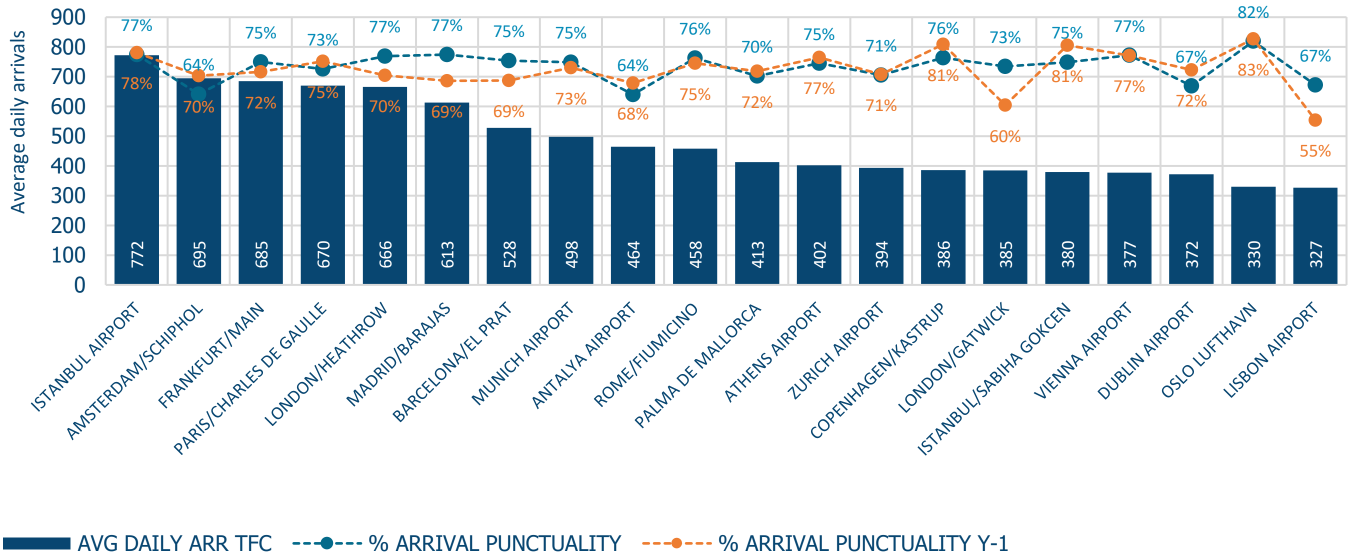



Network arrival punctuality (74.4.%) was higher than the October 2024 level (+1.5 p.p.).

Domestic routes (79.1%) arrival punctuality was higher than the network level and increased by 0.5 p.p. Punctuality on the south-east axis and south-west were higher than October 2024, +1.3 p.p. and +2.4 p.p. respectively.

First rotation arrival punctuality (85.7%) increased by 1.2 p.p. compared to October 2024.

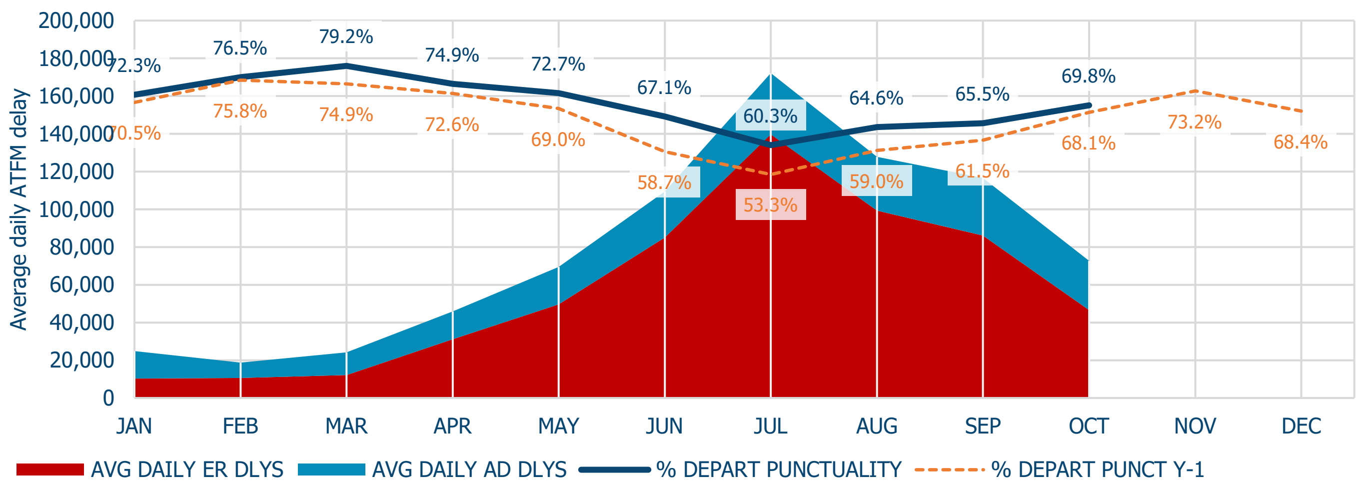
October 2025| Top 20 Airport arrival traffic and punctuality




Airport arrival punctuality at many of the Top 20 airports improved or remained stable when compared to October 2024. Amsterdam Schiphol saw daily regulations for aerodrome capacity causes, however the highest delays were due to weather (strong winds) notably on 04, 05 and 10 October. London Heathrow saw an improvement in punctuality as fewer weather regulations were recorded, with subsequent reactionary (knock-on) delays also reducing. London Gatwick also had better weather alongside fewer aerodrome capacity regulations. Lisbon airport improved over last year, despite capacity challenges and ongoing airfield work.

## 3.2 Departure punctuality

Network departure punctuality and ATFM delay




Network departure punctuality (69.8%) was above the level of October 2024 (+1.7 p.p.).

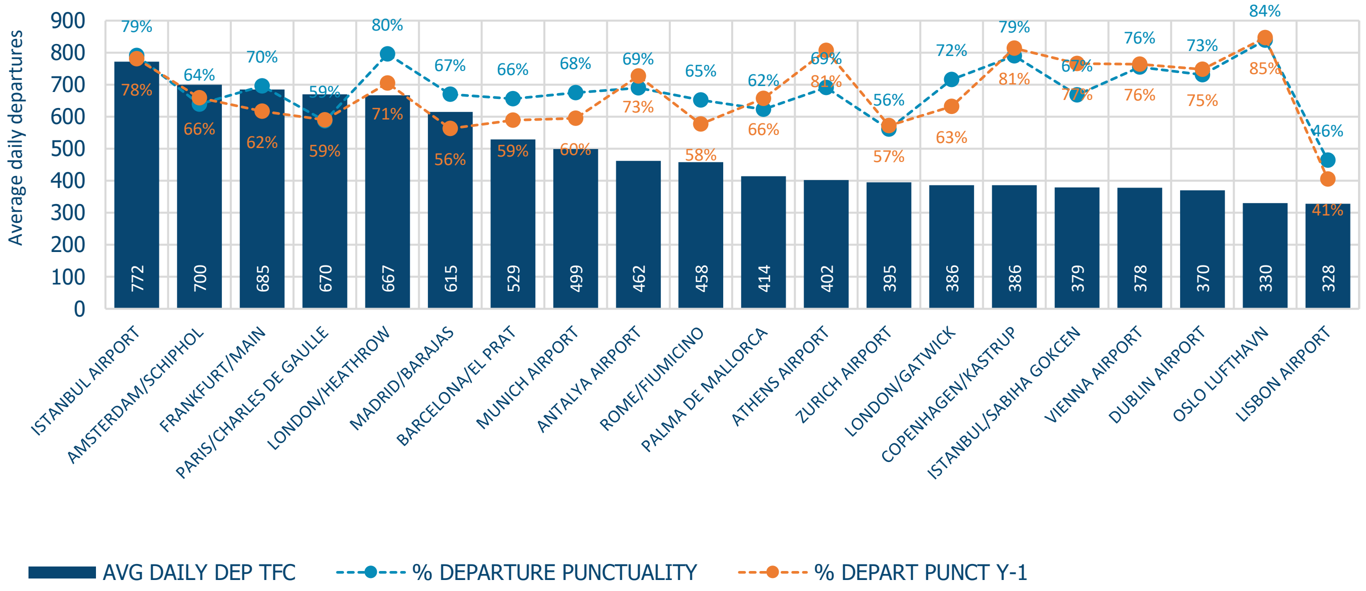
Punctuality on domestic routes was higher (77.7%) than punctuality at the network level. Punctuality on the intra NM southeast axis reached 68.9% in October, up 0.6 percentage points despite a 6.6% increase in traffic.

Network first rotation departure punctuality was 80.8% and was higher (0.9 p.p.) than the 2024 level.

**This view of operational punctuality can be tracked in near real-time by aircraft operator and airport level in the NORTI Dashboard and in MIRROR. Archived data can be found in the FATHOM interactive dashboard.*

*The Central Office for Delay Analysis CODA reports provide further detailed analysis of airline reported delay reasons.*

October 2025 | Top 20 Airport departure traffic and punctuality




Departure punctuality at the majority of the Top 20 airports also improved when compared to October 2024. As mentioned in the departure section London Heathrow and Gatwick saw fewer weather regulations. Palma saw very high delays on 11 and 12 October due to weather (thunderstorms and CBs). Lisbon experienced issues with punctuality due to weather conditions impacting arrivals, en-route ATFM regulations impacting departures, and capacity constraints.

# 4. Operations

## 4.1 Network Manager

NM continued to support operations affected by the Ukrainian war. It maintained airspace closures and NM systems supporting EU Sanctions Regulation for the Russian Federation and Belarus.

Following a ceasefire agreement in late June the Middle East crisis de-escalated leading to the reopening of most regional airspaces. EASA Information Notes remain in force for Tel Aviv and Tehran FIRs. The CZIBs have been extended for Beirut FIR (2024-01 R6), Baghdad FIR (2017-04 R19) and Damascus FIR (2017-03 R17).

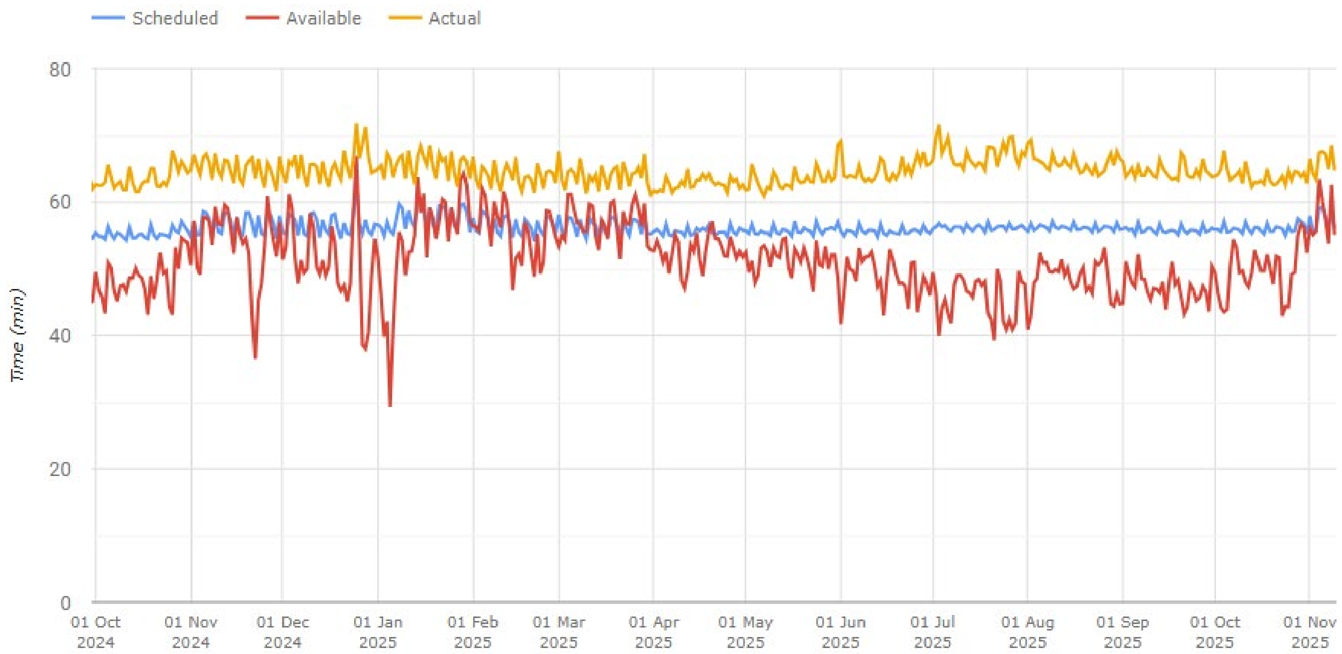
For Tel-Aviv FIR the NM continues to provide a consolidated view of relevant NOTAMs on the NOP Portal and the EUROCONTROL Network Manager Operations Centre (NMOC) continues working 24/7 to implement State required airspace restrictions and in support to daily airline operations for routings and delay mitigation. Movements at Ben Gurion airport are close to returning to normal traffic levels, however several airlines have kept their schedules paused due to regional tensions, with the intention of resuming operations later in the year.

The number of requests received by NMOC's E-Helpdesk decreased in October, down from 71,470 in September to 54,270 in October. Of these, 36,600 were submitted by airlines, 9,100 by FMPs and 8,600 by Towers. Among all requests, 6,100 related to flights identified as "critical" by the airlines. The average delay saved per processed request was 26 minutes.

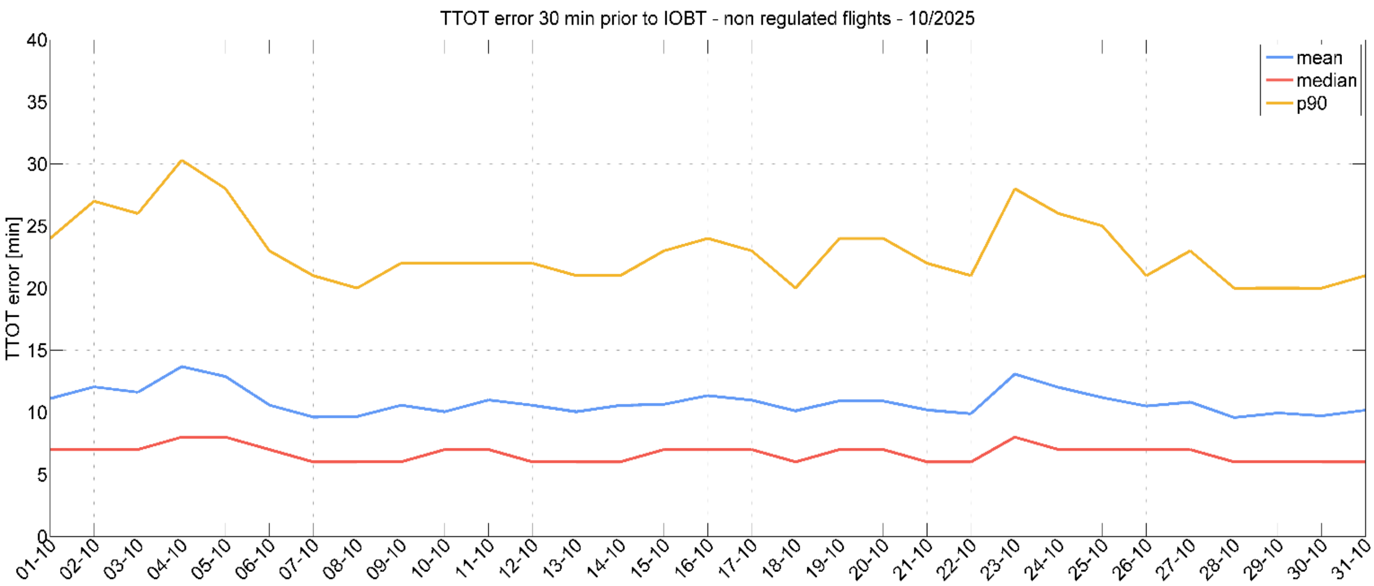
NM's Operational Centre reduced en-route ATFM delays by 10.6% and airport ATFM delays by 8.0% through direct actions.

## 4.2 Ground

MIRROR's indicator shows that in October the network (average) available turnaround time improved compared to October 2024. There were a few days such as 04 October where weather affected Amsterdam Schiphol and London Heathrow. The 23 October also saw drops in the available turnaround time when again Amsterdam suffered from weather, alongside Vienna, Nice and Cologne airports. The change in turnaround times at the very end of the month is the start of the IATA Winter 25/26 season, this year commencing on 26 October.




NM is monitoring TTOT calculation quality for the 33 A-CDM airports. The average error at a network level continues positive series started at the beginning of 2025 and decreased compared to October 2024 (10.8 minutes in 2024 vs. 10.7 minutes in 2025) and to September 2025 value, when the error was equal to 11.4 minutes. Helsinki (EFHK) showed the lowest error value among the airports, 7.1 minutes. Lisbon (LPPT) recorded the highest error at 17.2 minutes. NM is providing the details of the TTOT error to the A-CDM airports and is working with selected airport operators to improve the TTOT quality.



## 4.3 Network

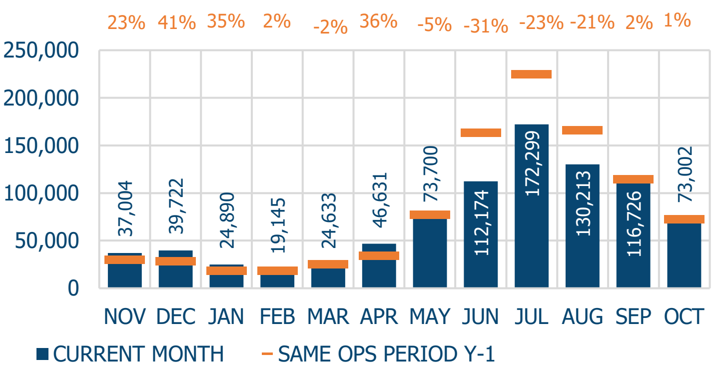
There were 2,263,053 minutes of ATFM delay in October, an increase of 1.1% compared to October 2024.

En-route ATFM delay represented 64.0% of total ATFM delay and airport was 36.0%. Total en-route ATFM delays decreased by 1.0% while total airport ATFM delays increased by 4.9% in October mainly due to a 70.8% increase of airport ATC capacity issues.

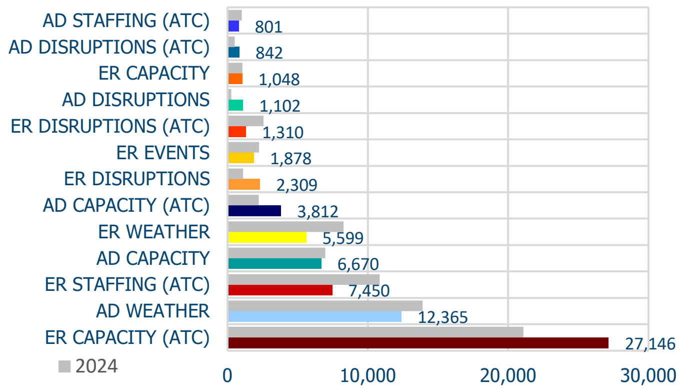
The average en-route ATFM delay per flight for the network was 1.4 minutes in October. The YTD en-route delay was 1.9 minutes, lower than in 2024.

The network departure schedule delay was 17.0 minutes/flight in October, stable compared to October 2024.

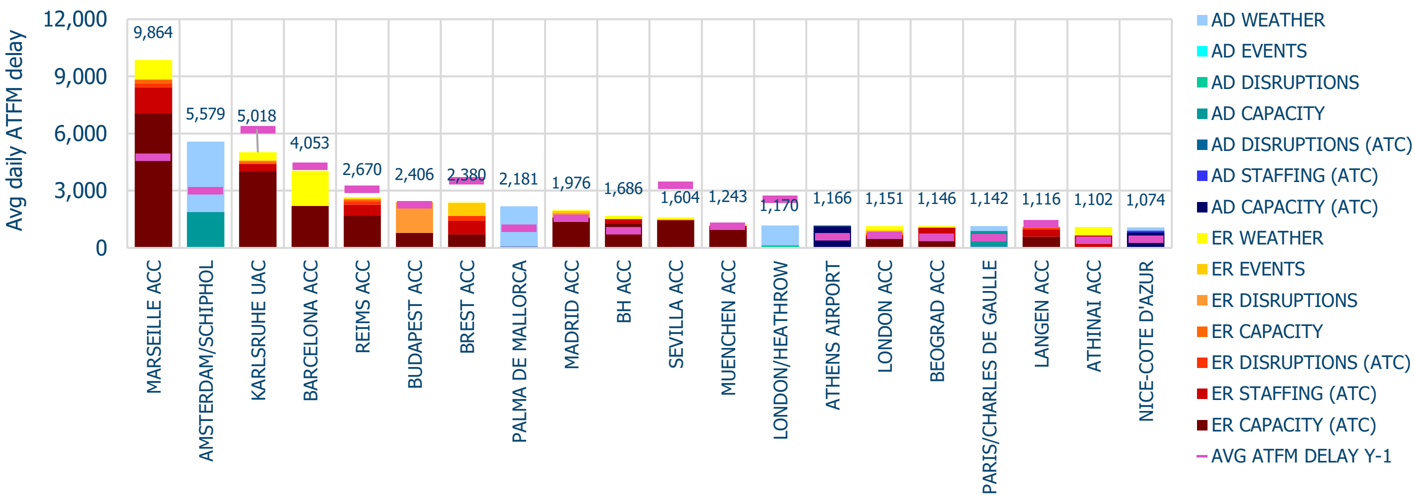
Last 12 months average daily ATFM delays




October 2025 | Reasons for ATFM delays




Top 20 delay reference locations in October 2025




The chart above shows the Top 20 delay generating locations for the reporting month with respect to total ATFM delays. Figures are the average daily ATFM delays in minutes for the individual locations:

- ATC capacity issues in Marseille, Karlsruhe UAC, Barcelona and Reims. Capacity issues generated high delays in Marseille throughout the month, particularly in the Eastern Sector Group, where limited sector availability combined with weather phenomena prompted notable capacity and weather delays.
- Seasonal weather such as strong winds and low visibility impacted operations strongly at Amsterdam Schiphol and Palma de Mallorca.
- Staffing shortage in Marseille and Brest ACC generated high delays.

## 4.4 Significant Events

**Events**

- On-going training and live trial periods in Brest ACC in preparation for the implementation of the 4-Flight system generated 21,518 minutes of ATFM delay throughout the month.
- A trial of ‘Occupancy’ type ATFM regulations in Reims ACC from 24 to 28 October generated 1,652 minutes of ATFM delay.
- A trial of ‘Occupancy’ type ATFM regulations in Warsaw ACC throughout the month generated 5,244 minutes of ATFM delay.
- A trial of ‘Occupancy’ type ATFM regulations in Lisbon ACC between 13 and 28 October generated a total of 7,147 minutes of ATFM delay.
- A trial of ‘Occupancy’ type ATFM regulations in Bordeaux ACC combined with ATC capacity issue generated a total of 14,440 minutes of ATFM delay throughout the month.
- A trial of ‘Occupancy’ type ATFM regulations in London ACC throughout the month generated 3,706 minutes of ATFM delay.

**Technical**

- OLDI failure in Brest and Reims ACCs on 02 October generated 2,689 minutes and 2,363 minutes of ATFM delay respectively.
- NAV equipment calibration in Langen ACC on 02 October generated 2,870 minutes of ATFM delay.
- On 02 October, a system downgrade in Brussels ACC as an aftereffect of the cyberattack in September generated 11,170 minutes of ATFM delay
- Radar maintenance at Cagliari airport from 03 to 05 October generated 4,439 minutes of ATFM delay.
- ILS issue at Athens airport on 04 October generated 1,345 minutes of ATFM delay.
- ILS calibration at Paris Orly airport on 13 October generated 1,128 minutes of ATFM delay.
- Technical issue with antenna AsPontes in Brest ACC from 20 to 22 October generated 4,049 minutes of ATFM delay.
- Communication system failure in Reims ACC on 21 October generated 2,418 minutes of ATFM delay.
- On 27 October, the non-alignment of clock changes between Europe and North America resulted in an alignment between North Atlantic, European and Domestic arrivals, prompting ATFM delays of 2,409 minutes.
- Ground radar issue at Marseille airport from 28 to 31 October generated 9,013 minutes of ATFM delay.

**Other**

- The additional complexity due to the Ukrainian crisis generated 49,972 minutes of ATFM delay in Budapest ACC.
- Military Exercise ‘Tactical Leadership Programme’ (TLP) limited airspace availability in Madrid ACC on 01 and 02 October and generated 3,664 minutes of ATFM delay.
- Multinational military exercise OCEAN SKY hosted by the Spanish Air Force in the Canary Islands during the second half of October generated 20,040 minutes of delays at Gran Canaria airport.

- Military exercise VOLFA 2025 in France from 01 to 10 October generated 6,782 minutes of ATFM delay in Madrid ACC and 1,893 minutes of ATFM delay in London ACC.
- Drones were detected within the vicinity of Munich and Berlin airports affecting over 100 flights. Palma de Mallorca and Alicante airports were also impacted after multiple drone sightings leading to short airport closures and flight diversions.

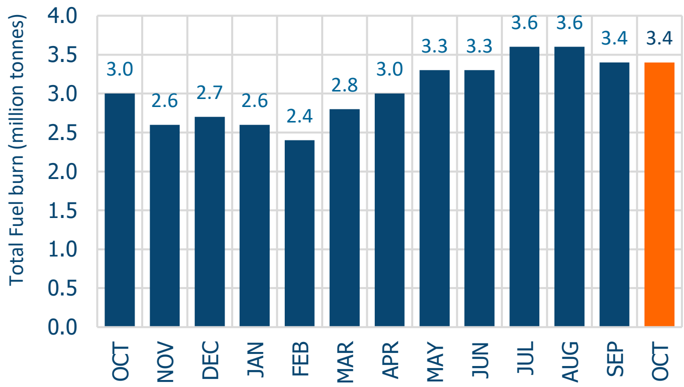
**Industrial action**

- ATC industrial actions in France on 02 October generated 8,246 minutes of en-route ATFM delay and 5,749 minutes of airport ATFM delay. Localised actions in Marseille ACC on 14, 15 and 25 October generated an additional 1,659 minutes of ATFM delay.
- On 14 October, industrial action in Belgium resulted in the cancellation of almost all departing flights from Brussels airport, with a few arrivals permitted. All flights at Charleroi airport were also cancelled.
- In Portugal, during October 2025, a series of airport strikes were staged by ground handling staff represented by the SIMA union (Sindicato das Indústrias Metalúrgicas e Afins). These actions did not involve air traffic controllers (NAV Portugal) or airport operators (ANA Aeroportos) directly, but they still caused notable disruptions across the country's major airports.

# 5. Flight Efficiency

## 5.1 Fuel Burn

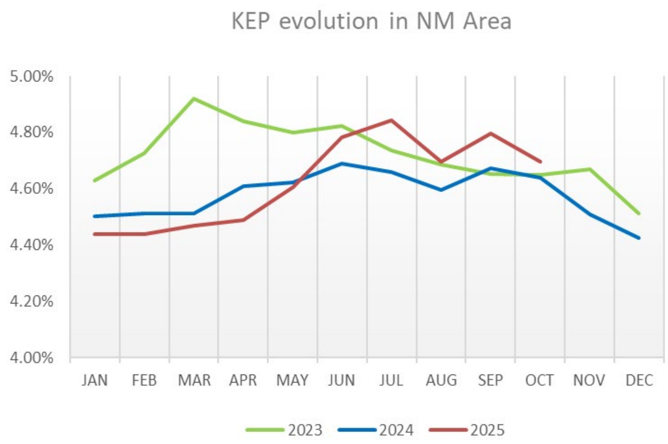
En-route fuel burn within NM area (tonnes)




NM estimates that 3.4 million tonnes of fuel were burnt in the en-route flight phase in the NM area in October 2025, an increase of 0.4 million tonnes from October 2024, alongside a 5.2% rise in traffic.

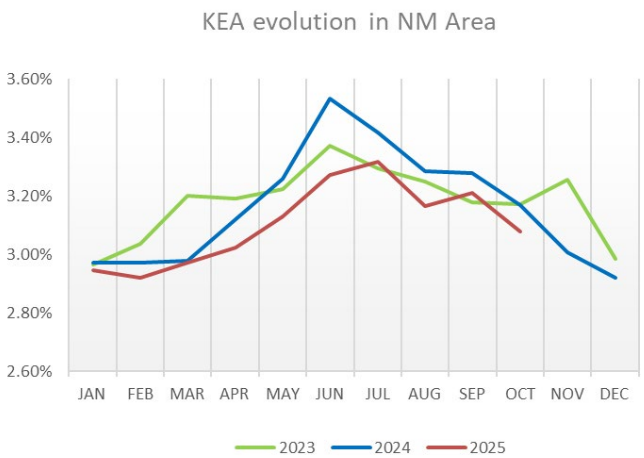
## 5.2 Horizontal Flight Efficiency

There are two horizontal flight efficiency KPIs[i]. The indicators provide a measure of the average en-route additional distance with respect to the great circle distance. One is based on the last filed flight plan (KEP) and the other on actual trajectory (KEA). KEP rose with summer constraints and stayed above 2023 and 2024 levels, while KEA was below 2024 and 2023 levels in October.




KEP indicator (4.70%) exceeded 2023 and 2024 levels.

NM Flight Efficiency Taskforce continues to support AOs to further improve their flight planning.




KEA indicator (3.08%) was below 2023 and 2024 levels in October.

# 6. Notice

**Traffic and Delay Comparisons**

All traffic and delay comparisons are between report month and equivalent operational period of the previous year.

**Traffic Monitoring**

Country traffic counts are based on arrival and departure traffic; overflights are excluded.

**NM Area**

All figures presented in this report are for the geographical area that is within Network Manager's responsibility (NM area). For further information on the NM Area go to the Reporting Assumptions and Descriptions document available on the EUROCONTROL website at **https://www.eurocontrol.int/network- performance**

**Regulation Reason Groupings**

For further information on the NM Area and the regulation reason groupings, go to the Reporting Assumptions and Descriptions document available on the EUROCONTROL website at **https://www.eurocontrol.int/network-performance**

**Airline Groupings**

Description and definition available on the EUROCONTROL website **https://www.eurocontrol.int/directory/airline-groups-lookup**

**ATFM Statistics dashboard**

More detailed information available via the **ATFM Statistics dashboard**

**FATHOM dashboard**

Interactive analysis tool to access archived data **FATHOM interactive dashboard**

**Network Operations Analysis document**

ATFM statistics provides an alternative source of network traffic and ATFM delays. **https://www.eurocontrol.int/dashboard/air-traffic-flow-management-statistics-dashboard**

And stakeholders can use FATHOM for a more detailed view of their operational performance.
**https://www.eurocontrol.int/tool/network-manager-interactive-analysis-tool**

Operational Performance Unit,

Network Management Directorate (NMD), EUROCONTROL,

96 Rue de la Fusée,

B - 1130 Brussels

mailto: nm.ops.perf@eurocontrol.int

**https://www.eurocontrol.int/network-performance**

[i] *More information on KEP and KEA, see ANS performance page.*

EUROCONTROL

SUPPORTING
EUROPEAN
AVIATION



www.eurocontrol.int