SUPPORTING
EUROPEAN
AVIATION

EUROCONTROL

AVIATION
INTELLIGENCE+

EUROCONTROL

EUROPEAN AVIATION OVERVIEW
2025

23 January 2026

2025 at a glance

11.1 million flights controlled in **the** NM area, +4% vs 2024. The number of flights has returned to the pre-pandemic levels (2019).

37,034 peak daily flights on 18 July 2025.

- Intra-European traffic **+3%** vs 2024
- Europe-Rest of the World **+8%** vs 2024.

14.6 min/flight of departure all-causes delay, -16% vs 2024 and +12% vs 2019 (+1.5 min/flight).

2.4 min/flight of ATFM delays (-17% on 2024) split between 1.7 min/flight for en-route and 0.7 min/flight at airports.

76.1% arrival punctuality for **network scheduled flights**: 3.5pp higher than in 2024, 2.0pp lower than in 2019.

9.8 million tonnes more CO_2 emissions (+5%) than in 2024 for gate-to-gate flights in NM Area.

€11.8 billion in en-route charges billed:

€1.8 billion more than in 2024
€3.9 billion more than in 2019

Fuel prices

Jet fuel price averaged $2.17/gallon, -9% vs 2024.

Low-Cost carriers (35.4% share of all flights) flew more flights than **Mainline carriers** (34.7%), for the first time.

- Low-cost carrier flights +6% up on 2024,
- Mainline carrier flights +4% up,
- Regional carrier flights remained stable.

Leading aircraft operators groups

- Ryanair Group **3,184** daily flights (+5% vs 2024),
- easyJet Group **1,611** daily flights (+4%),
- Turkish Airlines Group **1,559** daily flights (+9%),
- Lufthansa Airlines **1,125** daily flights (-2%),
- Air France Group **1,061** daily flights (+6%).

Almost all **States** were **up** compared to 2024. However, there was a very wide variation between States, with South-Eastern Europe growing the fastest.

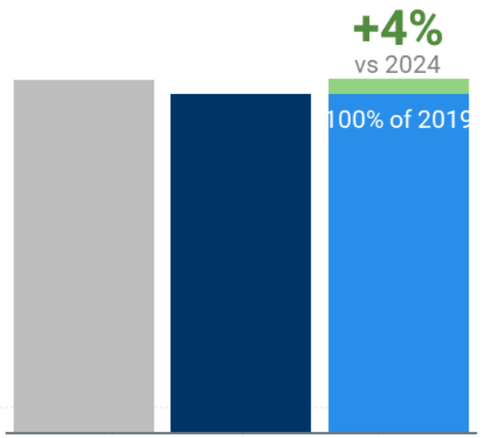
- **5,609** daily arr/dep in the **UK** (+2% vs 2024),
- **5,211** daily flights in **Spain** (+4%),
- **4,888** daily flights in **Germany** (+3%),
- **4,228** daily flights in **France** (+3%),
- **3,963** daily flights in **Italy** (+4%).

Executive Summary

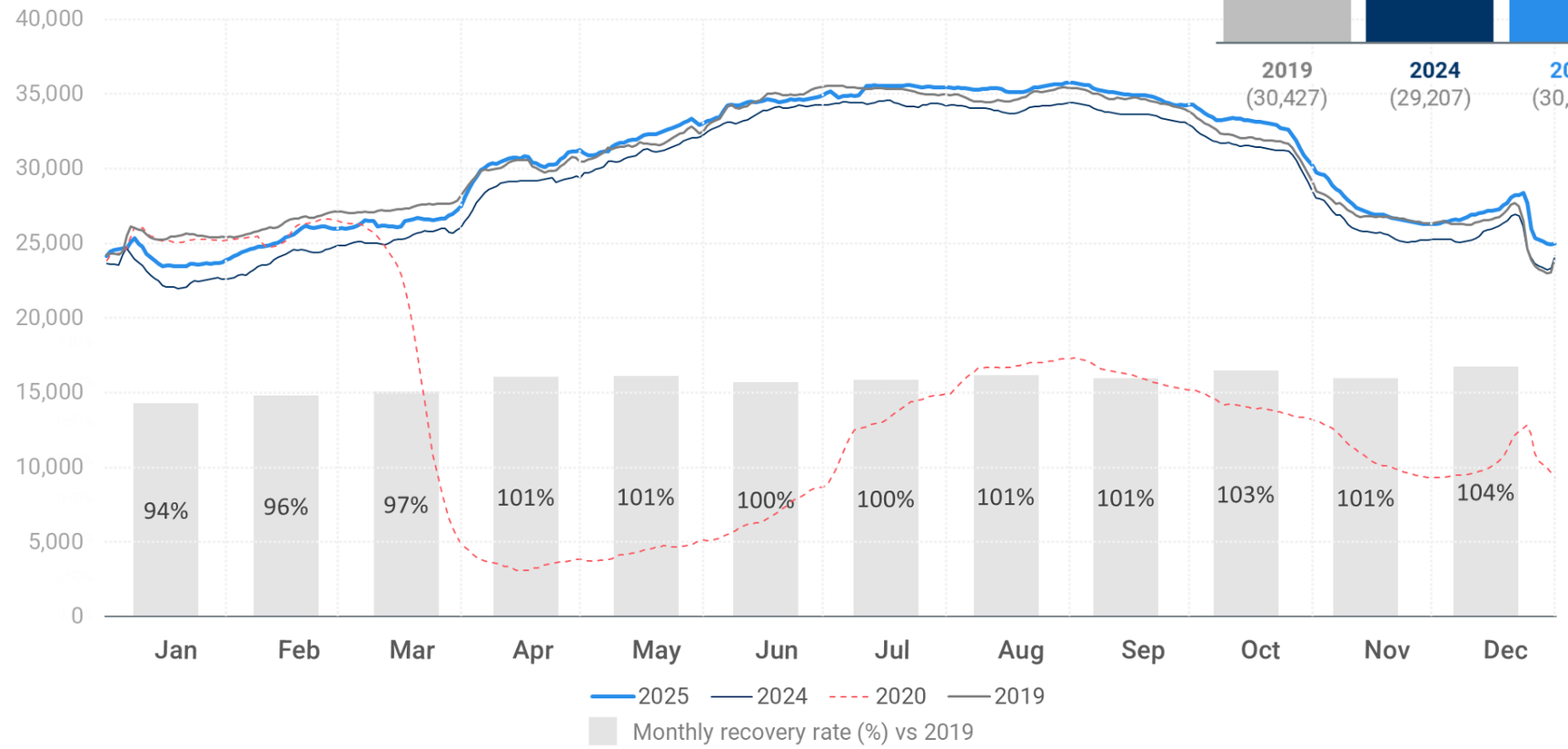
- 2025 recorded **11.1 million flights** in the EUROCONTROL Network Manager (NM) area*, **+4.1%** compared to 2024. On a daily basis, growth can be adjusted to **+4.3%** after accounting for the 2024 leap year.
- The 2025 recovery rate was in line with the base scenario in EUROCONTROL's latest 7-year traffic forecast.
- The total number of flights is now **comparable** to **pre-pandemic** volumes across the EUROCONTROL States as a whole (but with significant variation at State level, see below). Traffic has **continued to recover** since COVID-19, which created a hiatus lasting **six years** for **flights** (2020–2025), but only **five years** for **passenger numbers** (2020–2024).
- While globally flights have recovered, a two-speed dynamic can be observed across northern and southern states:
  - All States in **Southern Europe** have largely **surpassed** their **2019 levels** (double-digit growth rates) owing to strong demand on **touristic flows**. To add to this, the **South-East European** axis continued to be particularly busy as airline **route choices** were influenced by constrained airspaces/routes.
  - In **Northern Europe**, by contrast, most States have not recovered to their pre-pandemic levels. States in the **North-East** of **Europe** are still **well below** their 2019 levels, affected by airspace closures and flight bans (except Poland and Slovakia). Similarly, major States in the **North-West** of **Europe** (except Ireland) **are struggling to recover** owing to weak arrival/departure flows between them, a slowdown in domestic flows, and subdued volumes of long-haul flights at the main hubs on Asian/Pacific flows.
- **Ukraine's airspace** has been **closed** since February 2022, with neighbouring airspace absorbing more traffic. Geopolitical tensions in the **Middle East** including traffic to/from Israel have affected various flows and overflights. Airspace/route unavailability has led to additional complexity, putting pressure on ANSPs, despite several operational measures set up by the EUROCONTROL NM.
- The **largest market segment** in Europe in 2025 was **low-cost** (35.2% share), just outpacing **mainline** (34.7% share) by slightly more than 200 daily flights. **Low-cost carriers** were more **dynamic** (+6% vs 2024) than **traditional flag carriers** (+4%). The **third-largest** market segment, **regional**, had a 12% share, contracting by 1pp vs 2024. **Business aviation**, **all-cargo** and **charter** market shares remained unchanged compared to 2024, while the **military** segment expanded by 1pp.
- **2025 network arrival punctuality** was **76.1%**, +3.5pp vs 2024, but -2.0pp vs 2019.
- **ATFM delays** stood at **2.4 minutes per flight** for 2025 as a whole, **17% lower than in 2024**. This reflected a combination of better stakeholder coordination, proactive measures, and a significant reduction in weather disruptions compared to 2024. Despite efforts to mitigate disruptions, en-route ATFM delay (1.7 min/flight) was still above the EU-wide performance **target** set for 2025 (0.9 min/flight).
- The **jet fuel price** in 2025 averaged $2.17/gallon, **easing** on **2024 prices** by 9%.
- **Air ticket prices** – excluding inflation – were **slightly lower (-1%)** for Jan-Nov 2025 compared to the same period in 2024.
- For **2026**, the number of flights is **expected to grow year-on-year by more than 3%** in our **base** scenario, driven by leisure demand and continued strength of the low-cost carrier segment. Locally, the strong divergence across States is likely to persist with southern "leisure-oriented" States continuing to lead growth, while several States in the north (more hub-dependent) are expected to remain below pre-COVID levels.
- The forecast ranges from **+1.2%** (**low** scenario) to **+5%** (**high** scenario) as uncertainty remains high reflecting ongoing geopolitical, economic and regulatory risks.

* The ECAC member States posted a growth of 3.9% in 2025 (4.2% in daily terms) vs 2024.

Overall traffic evolution



Evolution of traffic in the EUROCONTROL Network (all flights including overflights)



- **2025** recorded a **slow start** in terms of the number of flights (96% of 2019 levels on average, +4% vs 2024) owing to **reduced capacity** offered by low-cost operators, and some cancellations due to bad weather.
- The **recovery to pre-pandemic levels** for the NM are as a whole started **from** the second quarter, together with the **start of the IATA summer season**.
- Over the **summer schedule period** (i.e. Apr-Oct), flights posted **average growth** of **+3.6%** vs 2024 and +0.8% vs 2019.
- The **last quarter** saw dynamic growth (+5.2% vs 2024, +2.4% vs 2019) **reflecting a strong start** to the **winter** 2025/2026 **schedules**.

State traffic

Departures and Arrivals, 2025 compared to 2024 and 2019

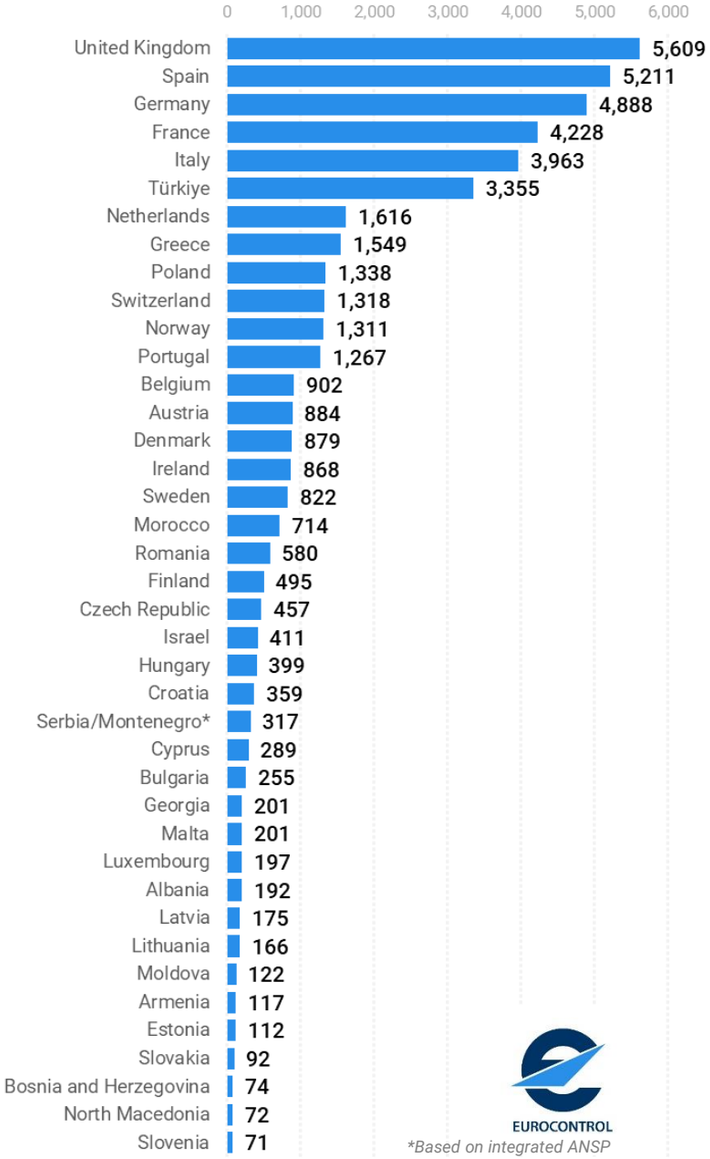
No.	Country	Average daily flights	% prev year	% 2019
1.	United Kingdom	5,609	+2%	-4%
2.	Spain	5,211	+5%	+13%
3.	Germany	4,888	+4%	-13%
4.	France	4,228	+3%	-2%
5.	Italy	3,963	+5%	+10%
6.	Türkiye	3,355	+7%	+20%
7.	Netherlands	1,616	+1%	-4%
8.	Greece	1,549	+4%	+23%
9.	Poland	1,338	+9%	+18%
10.	Switzerland	1,318	+2%	-0%

See more

EUROCONTROL

- The **top 10 States** in aggregate, considering arrivals and departures only, recorded **+4.0%** more flights compared to the previous year.
- The **United Kingdom** recorded the highest average number of daily flights in 2025 (5,609/day), a **+2.2%** increase on 2024. The second busiest State was **Spain** (5,211 flights/day, +4.5%), followed by **Germany** (4,888 flights/day, +3.8%).
- Compared to 2024, **Poland** enters the top 10 list in 9th, pushing Switzerland into 10th and Norway out of the list (now in 11th)
- **Poland** posted the highest increase (+9.1%) in the top 10, reflecting dynamic flows with Egypt (+40%), Italy (+26%) and Spain (+12%). The main contributors to growth were the Wizz Air Group, the Ryanair Group and LOT. The **Netherlands** posted the weakest top 10 increase (+1.3%), with +8% flight growth to/from Spain (+8%) offset by lower flows with the UK (their busiest), as well as to/from Germany, Italy and France.
- Five States within the top 10 continued to record traffic above 2019: **Greece** (+23%) and **Türkiye** (+12%) (both of which surpassed pre-COVID levels in 2022 and 2023, respectively), while the other three – **Poland** (+18%), **Spain** (+13%) and **Italy** (+10%) – achieved this in 2024. South Mediterranean destinations continue to thrive for tourism, not only for visitors from the north, but also intra-region. The five remaining States were between 13% below pre-COVID levels (**Germany**) and 2% below (**France**), owing to a combination of lower internal demand, reduced flows between North-West States (e.g. Germany, UK, France) and zero to the Russian Federation. Of these, **Switzerland** (-0.3%) is closest to 2019 levels.

Average daily dep/arr per State - 2025



EUROCONTROL

*Based on integrated ANSP

State traffic

Departures, Arrivals and Overflights, 2025 compared to 2024 and 2019

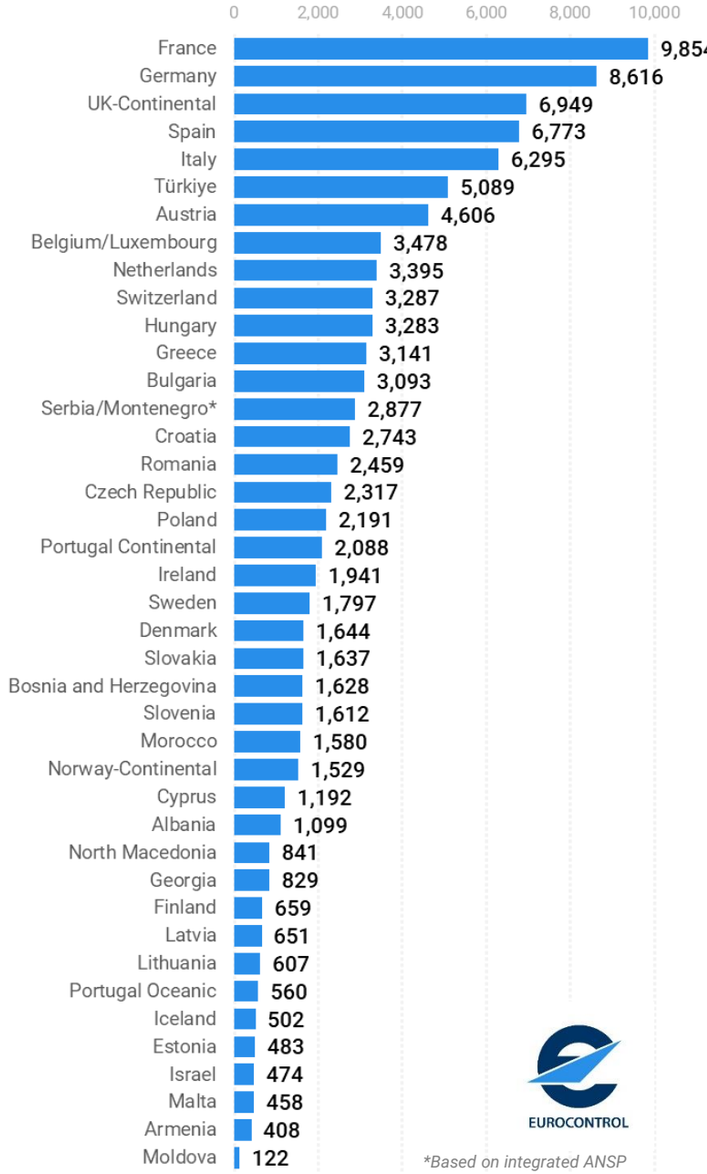
No.	Country	Average daily flights (including overflights)	% prev year	% 2019
1.	France	9,854	+5%	+7%
2.	Germany	8,616	+3%	-7%
3.	United Kingdom	6,949	+3%	-2%
4.	Spain	6,773	+5%	+15%
5.	Italy	6,295	+6%	+17%
6.	Türkiye	5,089	+9%	+20%
7.	Austria	4,606	+12%	+23%
8.	Belgium/Luxembourg	3,478	+6%	+2%
9.	Netherlands	3,395	-1%	-7%
10.	Switzerland	3,287	+1%	+2%

See more

includes Departures, Arrivals and Overflights.

- The **top 10 States** in aggregate, considering all flights including overflights, recorded **+4.9%** more flights compared to the previous year.
- **France** was the State recording the highest average number of daily flights in 2025 (9,854/day), a +4.7% increase on 2024. The second busiest State was **Germany** (8,616 flights/day, +3.3%), followed by the **UK** (6,949 flights/day, +3.0%).
- **Austria** posted the highest increase (+12%) mostly owing to a sharp increase of overflights (+14%) explained by a reduction in airspace constraints (compared to 2024) combined with a unit rate increase in neighbouring States in 2025. On top of the dynamic arrival/departure flows, **Türkiye** recorded growth in overflights (+12%), notably on flows Egypt ↔ Russia, Egypt ↔ Poland and UK ↔ South-East Asia.
- The **Netherlands** recorded a decline (-0.9%): some flows traditionally overflying the airspace (e.g. the majority of flows from/to UK) were re-routed via France or Belgium/Luxembourg, possibly linked to the increase in Dutch unit rates in 2025.
- In 2025, **South-Eastern States** continued to be **affected** by **airspace closures** and **flight bans** (conflict Russia-Ukraine started in Feb. 2022). The conflicts in the Near-East (started in Oct. 2023) created a volatile situation in terms of airspace and route availability in the region: June 2025 was particularly disrupted due to airstrikes. Some major European airports were disrupted (drone incidents, cyberattacks).
- Airline route choices were still influenced by constrained airspaces in Central Europe throughout the year. A shift of transatlantic flights more to the South increased the overflights in the UK, Ireland, France, Portugal and Spain and reduced them in the Nordic States.

Average flights (incl. overflights) - 2025

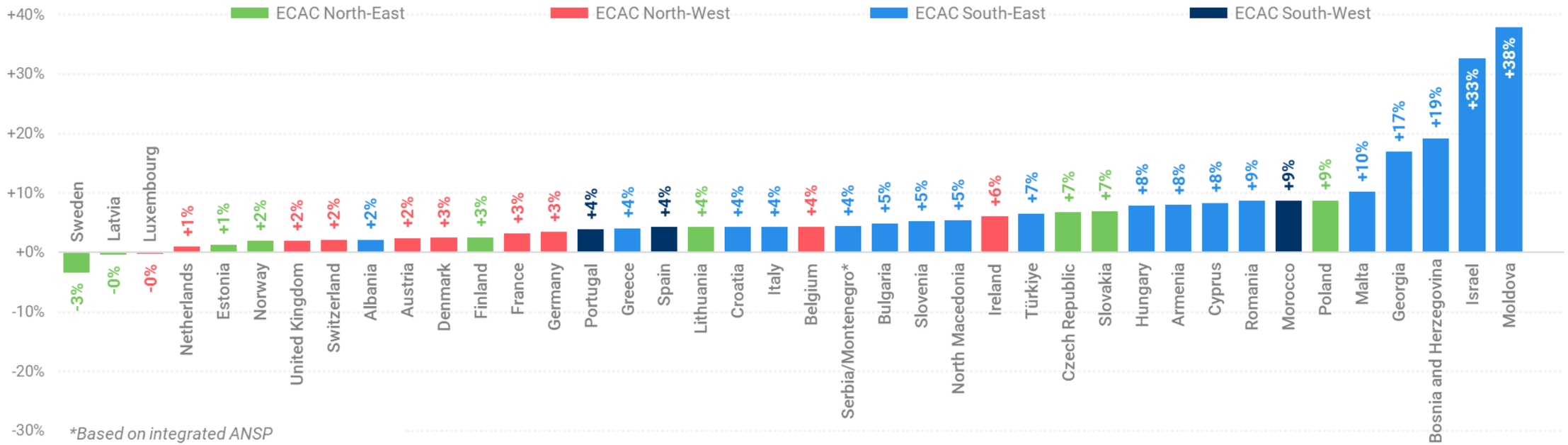


EUROCONTROL

*Based on integrated ANSP

State traffic variation

States - Traffic (departure/arrival) variations, 2025 compared to 2024



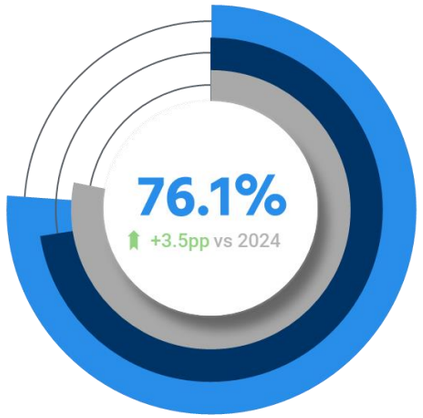
If we take a per-State, per-region view, we see significant differences in performance and situation:

- **Moldova**, the least busy State in our sample with the exception of Ukraine, has nevertheless experienced very high flight growth (+38%) due to dynamic traffic increases driven by the **Wizz Air Group**, **SkyUp Group** and **FlyOne** low-cost airlines, especially on flows with Türkiye, Germany and Italy.
- After the escalation in the conflict in **Israel** and related tensions in the Middle East in 2024, Israeli traffic rebounded by +33% in 2025, except for a dip in June.
- **Bosnia & Herzegovina** posted solid growth of 19% in 2025, mainly due to the expanded operations by the **Wizz Air**, **Ryanair** and **Turkish Airlines Groups** on flows with Germany, Türkiye and Italy.
- **Sweden** recorded 3% fewer flights than in 2024, mostly owing to fewer domestic flights. However, international flows started to increase as of August – especially after the government lifted aviation tax in July 2025.
- The majority of **Southern Europe** States continued to record the highest flight growth rates in 2025 vs 2024, although these have now levelled off as they surpass 2019 levels.
- Apart from a few exceptions (e.g. Poland, Ireland), States located in northern Europe recorded weaker rates and are still catching up with 2019 levels.

Punctuality and all-causes delay

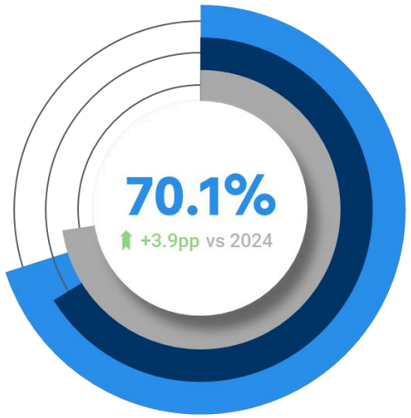
Punctuality (OTP15*) for all network scheduled flights, 2025 compared to 2024 and 2019

ARRIVAL PUNCTUALITY



72.5% _____ in 2024
78.1% _____ in 2019

DEPARTURE PUNCTUALITY

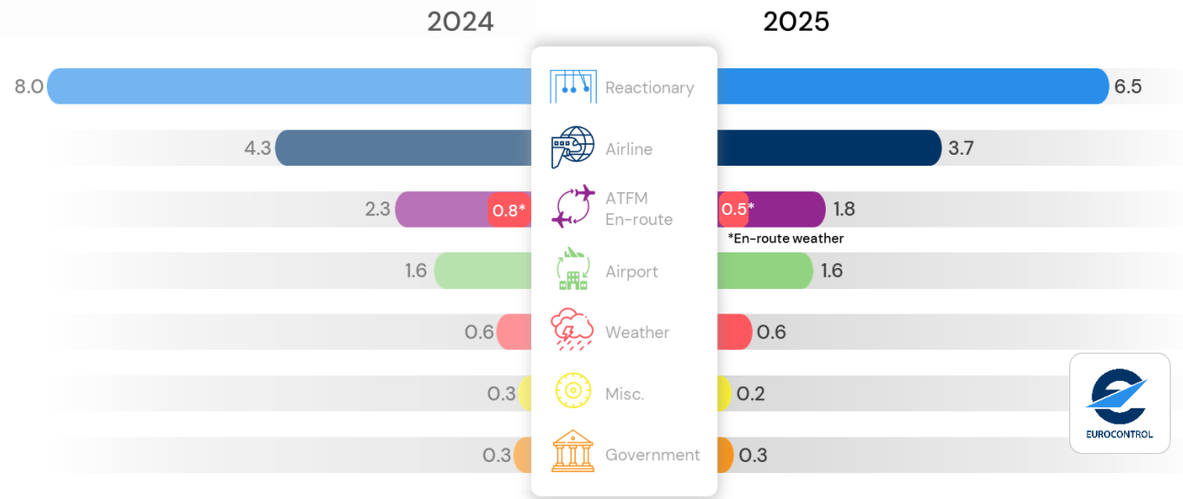


66.2% _____ in 2024
72.6% _____ in 2019

* Share of flights arriving/departing no later than 15 minutes after/before the scheduled time.

All causes delay drivers - Average delay per flight (min) on departure

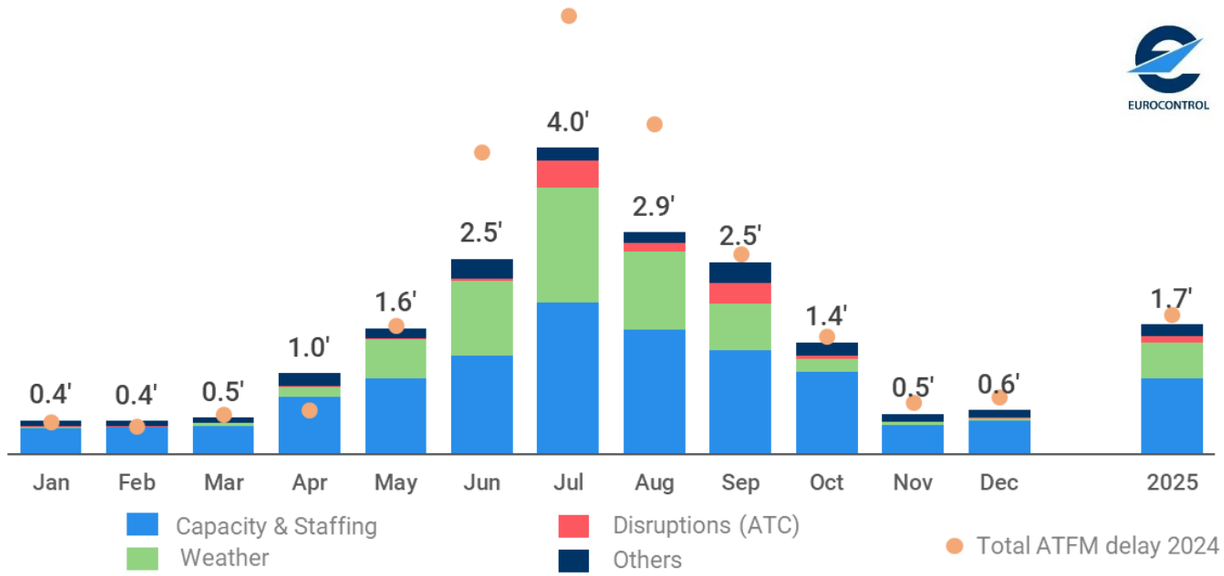
Jan-Dec 2024 and Jan-Dec 2025



- **Arrival punctuality** across the network in 2025 stood at **76.1%**, 3.5pp better than 2024, but still below 2019 (-2.0pp). **Departure punctuality** was **70.1%** for the year, following a similar trend – better (+3.9pp) than 2024 but below 2019 (-2.6pp).
- Looking at **all-causes delay**, **total delay per flight on departure** amounted to **14.6 min/flight** on average (vs 17.5 min/flight in 2024), a reduction of **-16%**. All categories posted a decrease on 2024. **Reactionary** delays remained the dominant delay reason, but were much improved (-19%) compared to 2024. Airline delays (mostly turnaround/ground handling delays) also improved (-13%).
- The **main causes** of **ATFM** delay at **airports** in **2025** were down to **weather** or **aerodrome capacity** reasons. **Athens** saw the highest amount of ATFM delay minutes in 2025, as the airport struggled with ATC capacity delays in the peak summer months, as well as runway work in the winter season. **Amsterdam Schiphol** suffered from aerodrome capacity regulations and weather events throughout the year, with high winds and low-visibility events causing the highest delays; the airport was also impacted by snow towards the end of the year. **London Heathrow** saw fewer ATFM weather regulations compared to 2024. **Nice** saw an increase in ATFM delays due to a combination of factors (ATC capacity, weather and ATC staffing causes), while **Lisbon** continued to suffer delays due to weather and aerodrome capacity reasons.

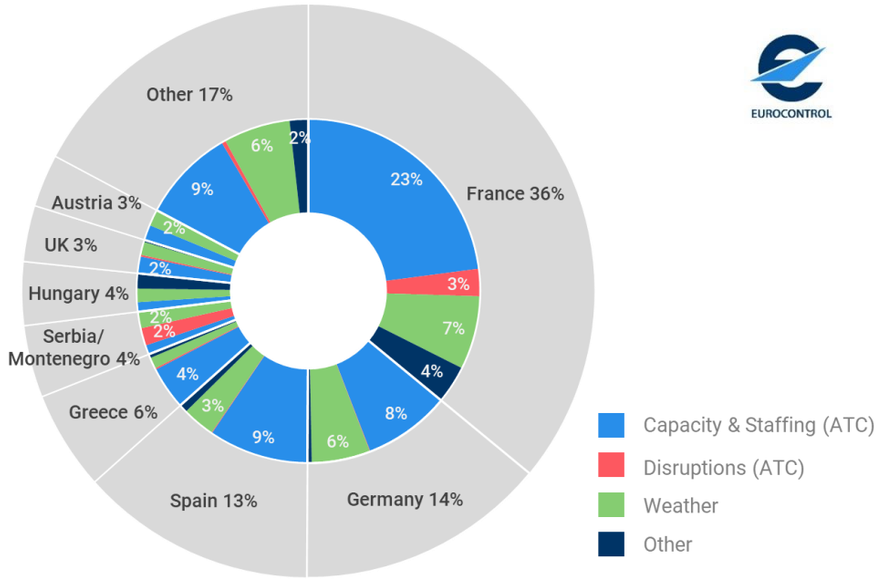
En-route ATFM delays

Monthly en-route ATFM delays per flight, per cause (in minutes per flight), 2025



- ANSPs recorded an **average en-route ATFM delay** of **1.7 min/flight** in 2025, a decrease of **-21%** compared to 2024, even with +4% more flights in the system.
- **Capacity & staffing** and **weather** issues were the main causes (58% and 28% respectively) for en-route ATFM delays. The **June-September period** averaged **3.0 min/flight; ATC capacity** and **staffing** shortages were again the main cause, but were -25% lower than the same period in 2024, owing to significant efforts made by ANSPs. Disruptive **weather** was also less frequent this summer which, in addition to improved network-centric strategic measures, helped reduce weather delays by -40% compared to Summer 2024. **Strikes** in France in July, and in September in Serbia, had a noticeable effect on the network, increasing disruption delays by +91% compared to Jun-Sep 2024.
- The **average airport AFTM delay** was **0.7 min per flight** in 2025 (-5% vs 2024).

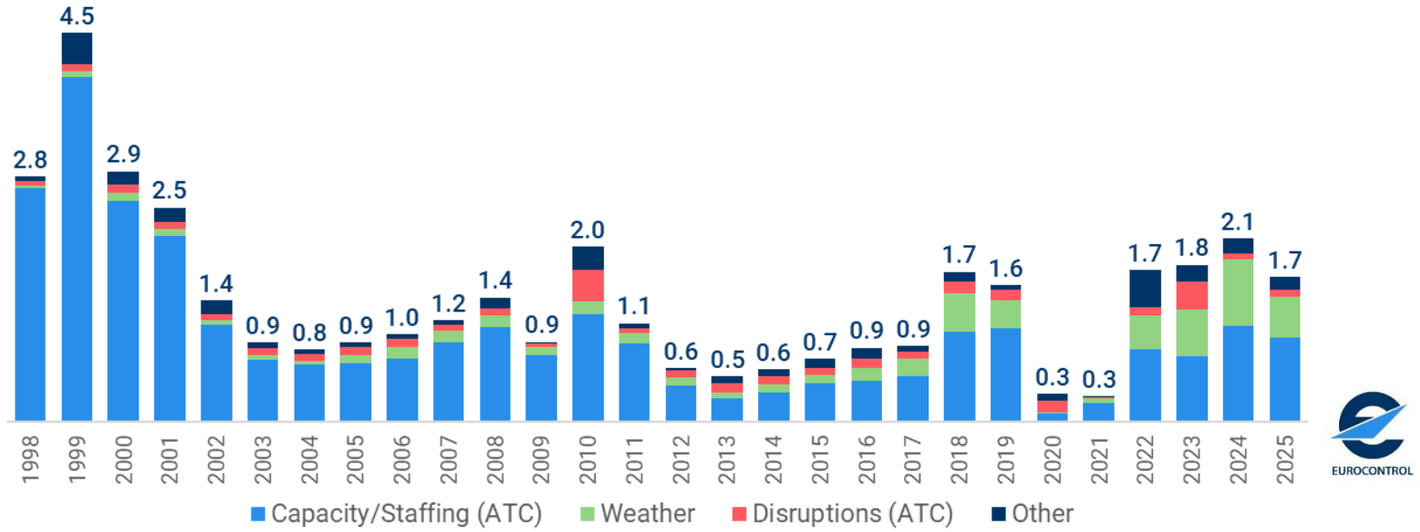
Share of en-route ATFM delays per country and cause (% of minutes) - 2025



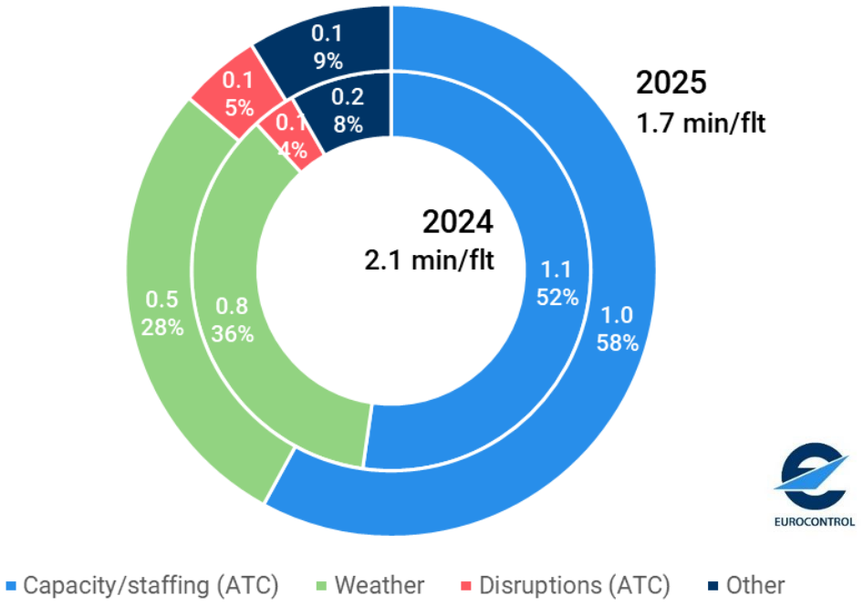
- **France, Germany** and **Spain** accounted for two thirds of all en-route ATFM delays.
- **France** accounted for 36% of all en-route ATFM delays, with the main causes being capacity & staffing (especially in Marseille and Reims ACCs) as well as weather and ATC disruptions.
- **Germany** accounted for 14% of all en-route ATFM delays. Despite German ACCs' recurrent structural capacity & staffing issues, 2025 saw an improvement with en-route ATFM delays reduced by 34% compared to 2024. Karlsruhe UAC, despite accounting for 63% of Germany's en-route ATFM delay, improved by 44%.
- **Spain** accounted for 13% of all en-route ATFM delays, with Barcelona ACC (+26%) and Madrid ACC (+43%) generating 77% of such delays. This reflected traffic increases of +5% vs 2024, which led to some capacity shortages. In addition, Barcelona ACC suffered severe weather events, in particular June-September.

En-route ATFM delays

En-Route ATFM delays per flight, per cause (in minutes per flight), since 1998



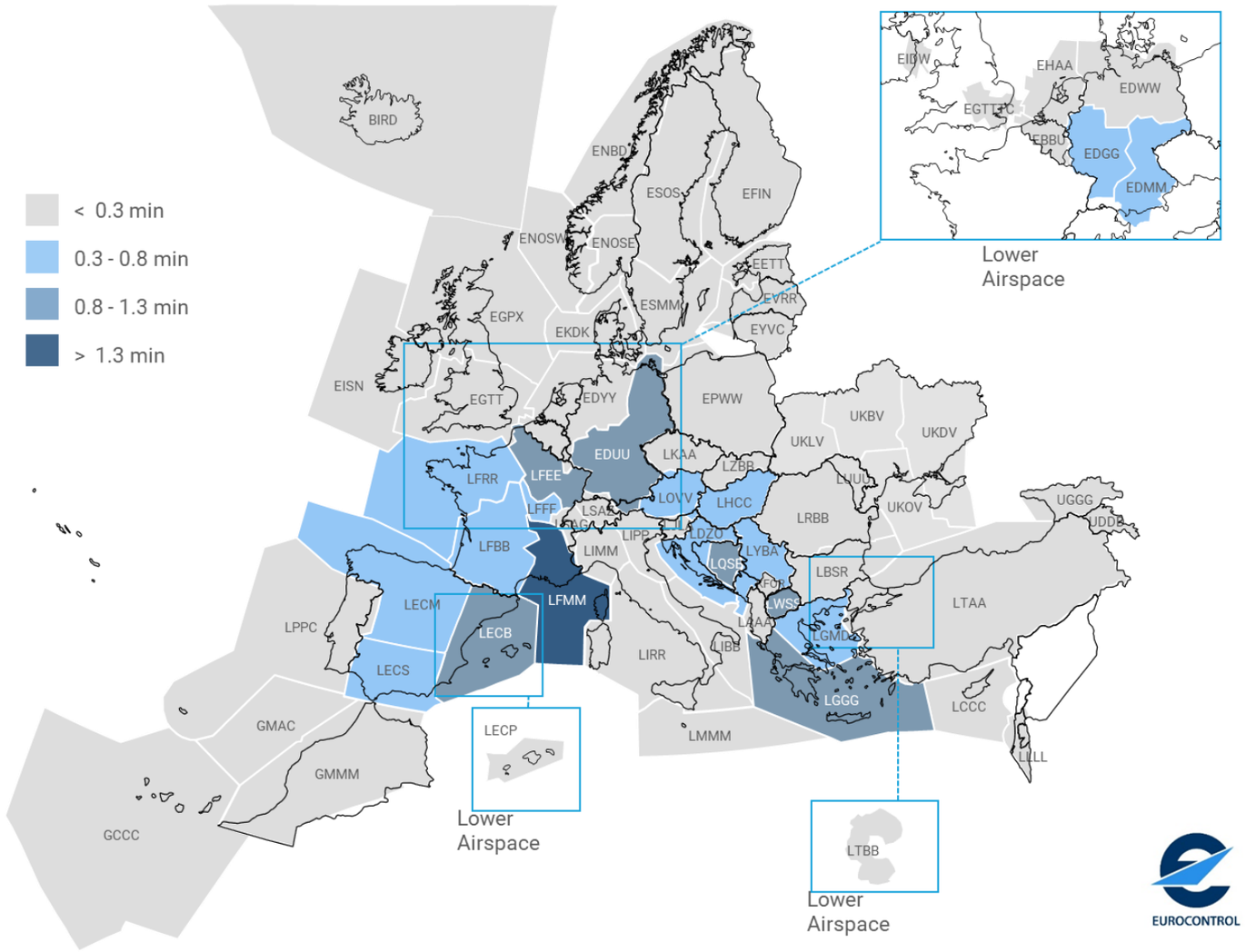
Share of En-Route ATFM delays per flight, per cause (%)



- **En-route ATFM delays** reached **1.7 min/flight**, a **better performance in 2025** than over the last three years. The level of en-route ATFM delays stayed below the 2 min/flight peak of 2024. This is still however **0.8 min/flight higher** than the EU-wide performance **target** set in the area of capacity for 2025 (0.9 min/flight).
- **Capacity & staffing** remained the **largest delay cause**, as it has been historically, accounting for 58% of en-route ATFM delays. This however improved by 12% compared to 2024. Germany, Hungary and Croatia, after having been in the top six countries generating capacity & staffing delays in 2024, posted significant delay reductions: -29%, -87% and -78% respectively. Conversely, France again topped the list, with a +67% increase compared to 2024.
- After a record-breaking 2024 summer in terms of **weather** delays, 2025 benefited from fewer severe weather events (43 days when weather represented more than 50% of en-route ATFM delay in 2024, vs just 23 in 2025) coupled with improved network-centric strategic measures. This helped reduce delays by 38% over the year. However, some Mediterranean (Marseille, Barcelona), Balkans (Belgrade, Zagreb) and central European (Karlsruhe, Vienna, Budapest) ACCs still saw significant disruptive weather events.
- **ATC disruptions** remained at a similar level (0.1 min/flight) to 2024, driven mostly by strikes in France on 3/4 July and from late August to the end of September in Serbia.

En-route ATFM delayed flights per Area Control Centre

Average delay per flight, 2025



- **Marseille** (2.6 min/flight), was the only ACC that finished the year with en-route ATFM delays **higher than 1.3 min/flight.** Recurring capacity & staffing delays (73%) increased by 147% vs 2024. Bad weather (18%) was also a factor, increasing by 36%.
- Six ACCs posted en-route ATFM delays per flight **between 0.8 and 1.3 min/flight**:
  - **Reims** (1.3 min/flight), with recurring capacity and staffing issues (74%).
  - **Barcelona** (1.2 min/flight) saw a complicated summer in terms of weather, compounded by a yearly 5% traffic increase. This led to capacity delays (66%) and weather delays (32%), both increasing significantly compared to 2024.
  - **Skopje** (0.9 min/flight) faced an 8% traffic increase compared to 2024, leading to capacity delays (79%).
  - **Sarajevo** (0.9 min/flight) faced 11% traffic growth, generating capacity & staffing delays (78%).
  - **Karlsruhe** (0.8 min/flight) showed a significant improvement on 2024 with capacity delays (-42%); these still represented 52% of delays, with and weather accounting for 42% (while -47% vs 2024).
  - **Athens** (0.8 min/flight), mostly owing to recurrent staffing issues (69%) and higher demand (+6%).

Aircraft operator traffic

Top 10 aircraft operators, 2025 average daily flights, compared to 2024 and 2019

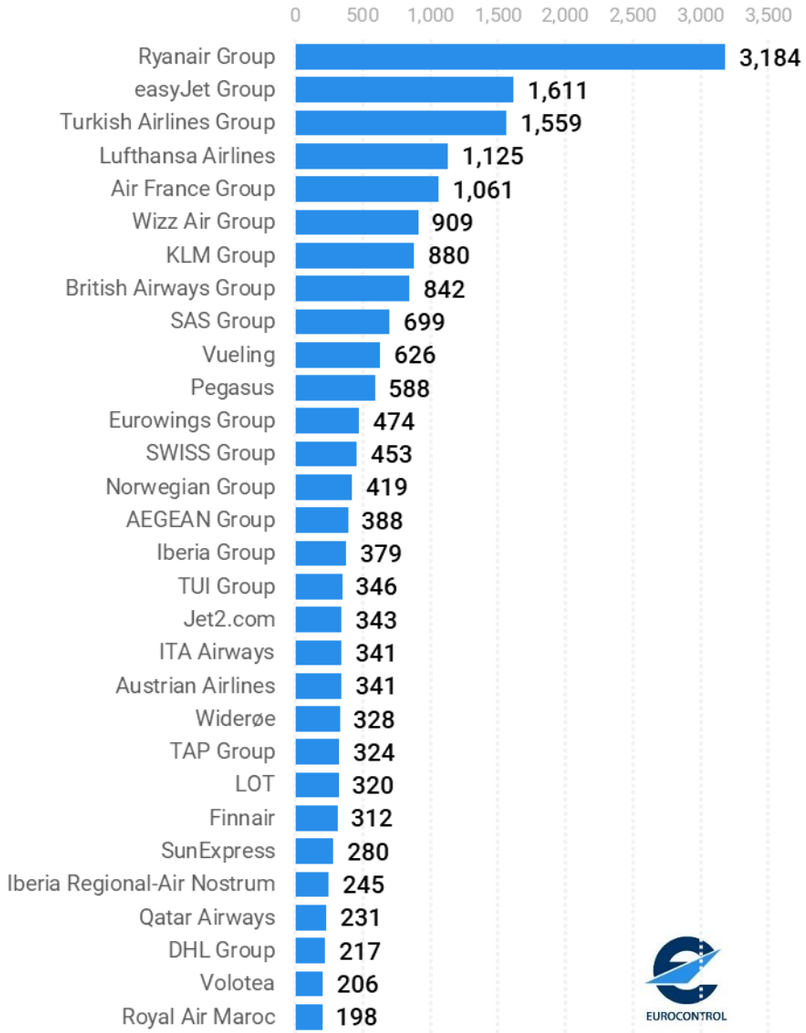
No.	Aircraft operator	Average daily flights	% prev year	% 2019
1.	Ryanair Group	3,184	+5%	+37%
2.	easyJet Group	1,611	+4%	-4%
3.	Turkish Airlines Group	1,559	+9%	+17%
4.	Lufthansa Airlines	1,125	-2%	-24%
5.	Air France Group	1,061	+6%	-11%
6.	Wizz Air Group	909	+9%	+54%
7.	KLM Group	880	+2%	+3%
8.	British Airways Group	842	+2%	-8%
9.	SAS Group	699	+14%	-14%
10.	Vueling	626	+3%	+4%

See more

EUROCONTROL

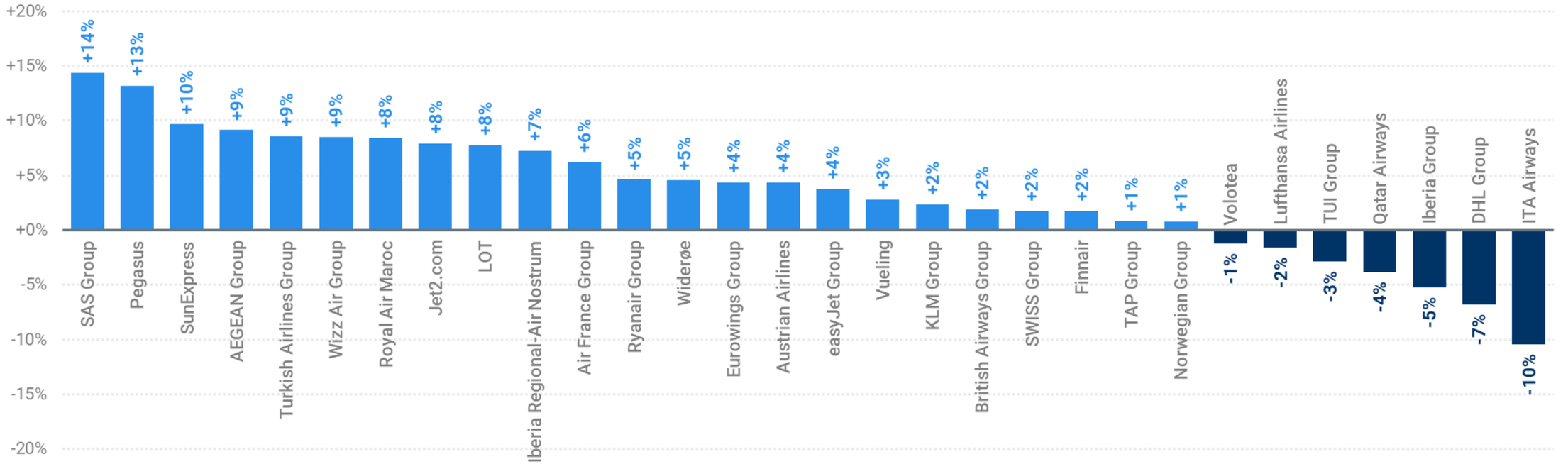
- In **2025**, the **busiest 10** aircraft **operators** in aggregate recorded **+4.8%** more flights compared to 2024.
- **Ryanair Group** finished in top position for the eleventh year running with 3,184 daily flights. The ranking remained the same as in 2024, except that the **Wizz Air Group** returned to 6th in place of the **KLM Group**.
- The **Ryanair Group**'s +4.6% increase was mostly driven by a strong increase in domestic flows in Italy, Spain ↔ UK, Italy ↔ Poland and Italy ↔ Spain. The **SAS Group** posted a +14% increase, mostly reflecting higher domestic flows in Sweden.
- The **Turkish Airlines Group** recorded an +8.6% increase, owing to a recovery on domestic flows in Türkiye (from 2024) and some increase of flights between Türkiye and Saudi Arabia, Germany, Egypt and Russian Federation.
- The **Wizz Air Group** recorded 8.6% growth compared to 2024, owing to more flights on flows between Italy and Poland, Spain and Romania.
- As in 2024, half of the aircraft operator groups in the top 10 recovered or surpassed their **2019 traffic levels**, including three low-cost carriers (**Wizz Air Group** +54%, **Ryanair Group** +37% and **Vueling** +4%). The five remaining operators were still between 24% (**Lufthansa Airlines**) and 4% (**easyJet Group**) below pre-COVID levels.
- There were **no significant** ranking **changes** in the top 40: in 2025, Condor (39) and Air Dolomiti (40) were new to the list, replacing **Loganair** and **Air Serbia**. The largest changes vs 2024 saw **Jet2.com** (18) and **Royal Air Maroc** (30) moving up the list, while **ITA Airways** (19) moved down.

Top 30 aircraft operators - 2025 average daily flights



Aircraft operator traffic variation

Top 30 aircraft operators - Traffic variation 2025 compared to 2024



- The most dynamic aircraft operators in 2025 in terms of growth are split between mainline, low-cost or regional operators. All bar seven of the busiest 30 airlines posted increases with respect to 2024.
- In 2025 the SAS Group posted the largest increase vs 2024 among the busiest 30 operators (+14%) owing to their wet-lease partnership with Braathens (now operating on behalf of SAS) which aimed at securing reliable and efficient domestic air connectivity within Sweden. Growth was also recorded on flows between the Scandinavian States.
- Pegasus posted a +13% increase owing to dynamic flows within Türkiye, as well as on flows between Türkiye and Germany, Egypt and Russian Federation.
- ITA Airways recorded a -10% decrease vs 2024, mainly explained by a decline in Italian domestic flights (with some routes taken over by AeroItalia).
- Although the DHL Group is +15% above its pre-pandemic levels, the cargo airline recorded a 7% year-on-year decrease with lower flows with Germany and with Denmark. The Iberia Group decreased flights by 5% in 2025 but remained 3% above 2019 levels, with lower domestic flows in Spain but also between Spain and Portugal, Germany and France.

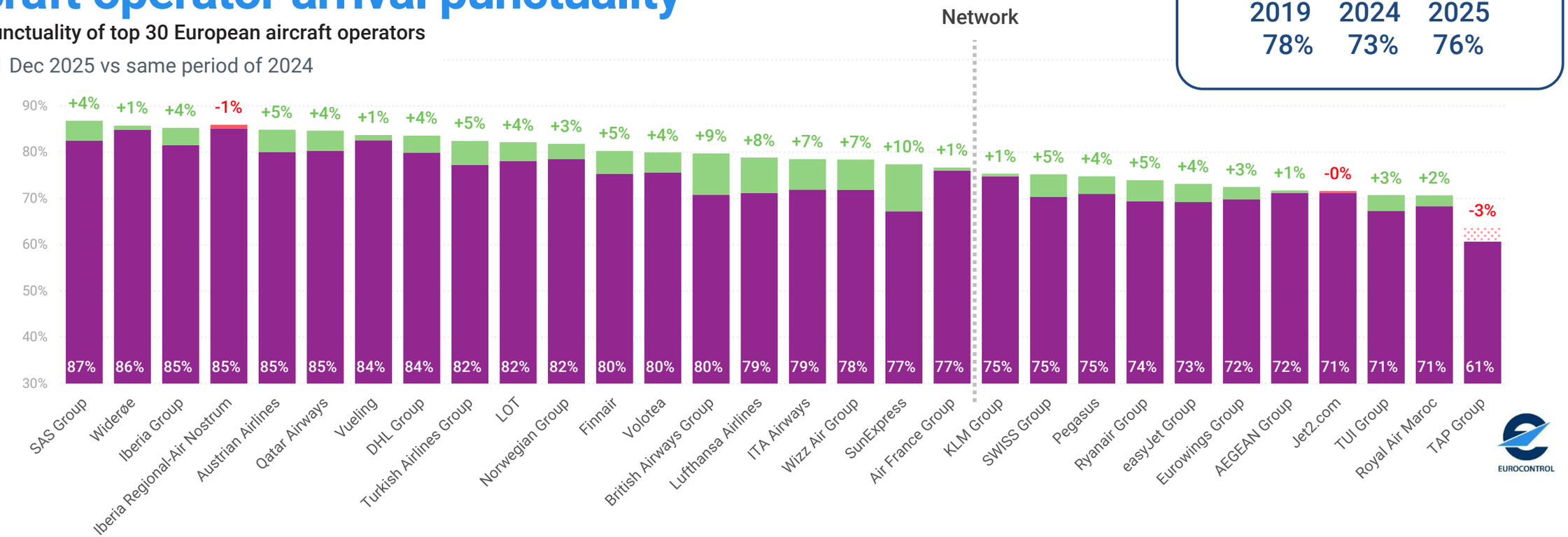
Aircraft operator arrival punctuality

Arrival punctuality of top 30 European aircraft operators

1 Jan - 31 Dec 2025 vs same period of 2024

Network level:

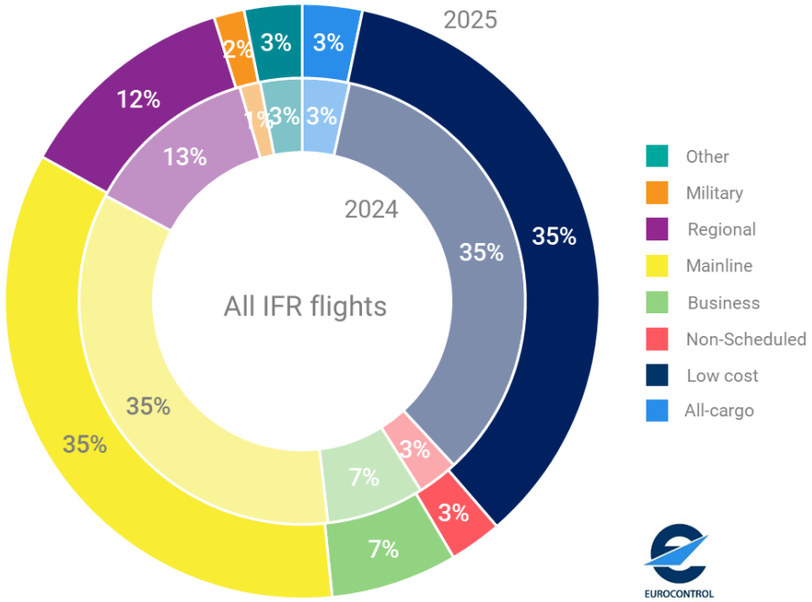
2019	2024	2025
78%	73%	76%



- **Arrival punctuality** is of particular significance given its importance in the overall passenger experience.
- At network level, arrival punctuality in 2025 was higher than in 2024 (**76.1%, +3.5pp)** despite 4% more traffic. This is still however below the 2019 level of 78.1%.
- Four operators posted **arrival punctuality higher than 85%**: the **SAS Group** (87%), **Widerøe** (86%), the **Iberia Group** (85%) and **Iberia Regional** (85%). At the bottom of the list are TAP (61%), Royal Air Maroc (71%), TUI Group (71%) and Jet2.com (71%).
- **Compared to 2024** an impressive **27 of the 30 busiest carriers improved their arrival punctuality**. SunExpress (+10pp), British Airways Group (+9pp), Lufthansa Airlines (+8pp), ITA Airways and Wizz Air Group (+7pp) recorded the largest improvements; the only deteriorations were posted by TAP Group (-3pp) and Iberia Regional (-1pp), with Jet2.com at -0pp.
- Compared to 2019, **12 operators are above their 2019 levels**, whereas in 2024 the number was only four.

Market segments

Average share of total flights



No.	Market segment	Avg. flights	% prev year	% 2019
1.	Low Cost	10,788	+6%	+13%
2.	Mainline	10,568	+4%	-4%
3.	Regional	3,699	-0%	-19%
4.	Business	2,099	+1%	+11%
5.	All-cargo	993	-1%	-1%
6.	Other	957	+8%	+7%
7.	Non-Scheduled	869	-0%	-18%
8.	Military	504	+15%	+22%

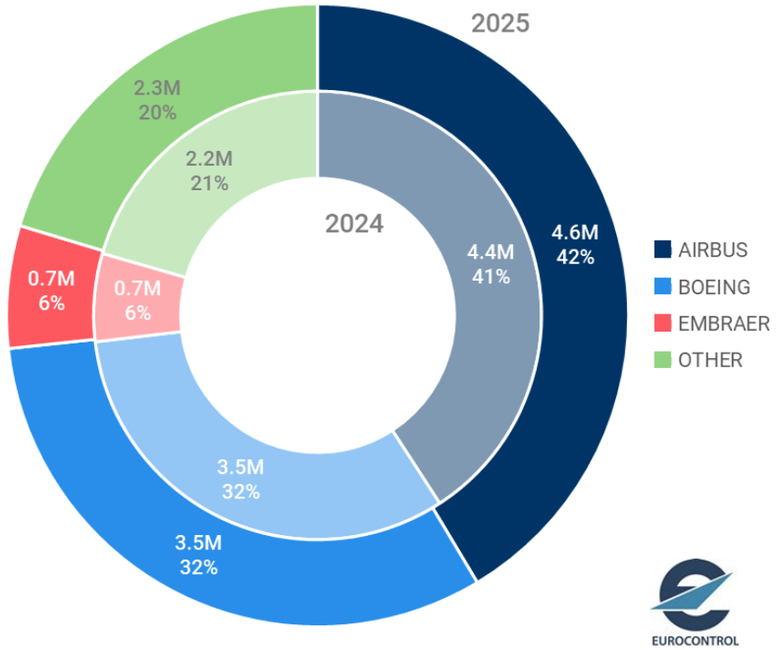
- In 2025, **low-cost** operators and **mainline** ones accounted for a **similar market share**: ~**35%** each – with the **low-cost** segment outpacing **mainline** narrowly by 220 daily flights.
- Compared to 2024, the **low-cost** segment **market share** slightly **expanded** by **0.7pp,** corresponding to a 6% **increase** in the number of flights. This was mainly explained by an expansion of domestic flows in Türkiye* and on flows Spain ↔ UK, Germany ↔ Türkiye, Italy ↔ Spain and Italy ↔ Poland.
- The **mainline** segment share **remained stable** compared to 2024 and was +4% above **2024** levels. This segment is still 4% below 2019 levels, mostly due to the weakness of domestic markets such as Türkiye*, Germany, France, Italy and Norway, as well as lost connections between European States and the Russian Federation.
- The **regional** segment recorded a **12% market share**, contracting by **1pp** compared to 2024. The segment saw almost the same number of flights in 2025 vs 2024. However, it remains the segment farthest from 2019 levels at -19%. Some traditional routes have seen lower demand due to a combination of factors (higher ticket prices, rail/road competition, government initiatives and environmental campaigns). The most affected links are domestic flows in Sweden, France, Germany and Spain, as well as flows between north-west European States.
- The **non-scheduled** segment (**3%** of all flights) recorded similar volumes compared to 2024 but remained -18% below 2019, affected by the loss of flights to/from Russia and Ukraine.
- **Business aviation** (**7%** of all flights) posted a weak increase (+1%) in 2025 vs 2024. The **all-cargo** segment recorded another year of decline in 2025 (-1%), despite a stable market share (3%).
- The **military**** (**2%** of all flights) recorded a solid increase (+15% vs 2024), partly due to a more comprehensive dataset.

** The **market segment** rules have been updated for several All-Cargo and Low-Cost operators and have been applied retroactively from January 2024. In particular, Ajet airline is a low-cost airline from 2024 (previously operating on behalf of the Turkish Airlines).*

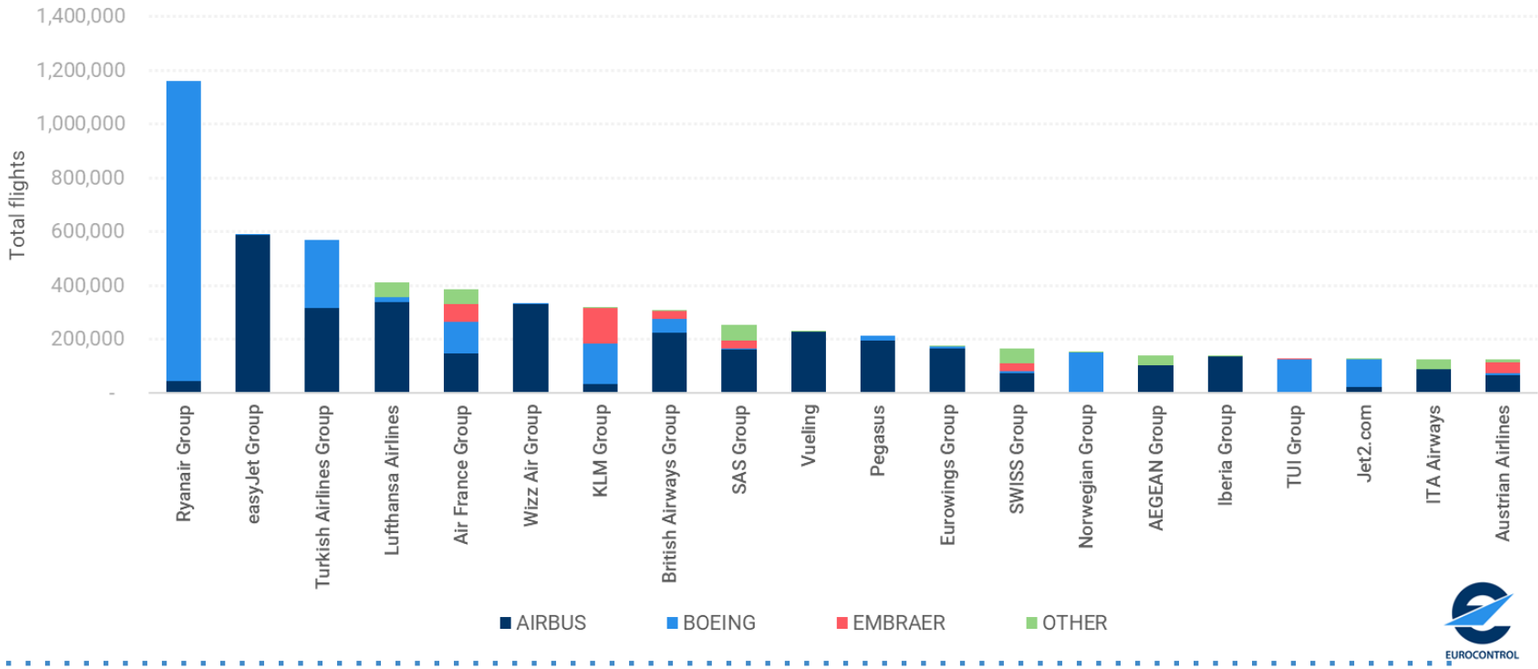
*** From 2024 onwards, some States (BE, UK, DE and NL) include iOAT in their flight counts.*

Aircraft manufacturers

Share of flights by aircraft manufacturer



Flights of the top 20 aircraft operators by Aircraft Manufacturers



- At the European level, **42%** of all **flights** in **2025** were operated by **Airbus** aircraft, vs **32%** by **Boeing** aircraft, and 6% by **Embraer**.
- **Airbus's market share increased** by **1pp** from 2024 to 2025, whereas **Boeing's** market share remained **stable**.
- The situation varies across the busiest 20 aircraft operators, where Airbus' share – at 54% - is much larger than Boeing's at 35%.
- In 2025, the share of flights operated with **new generation narrow-body aircraft** in **Airbus** total flights was **31%** (neos) compared to **18%** for **Boeing** (MAXes). Both shares have increased by 4 and 2pp respectively compared to 2024.

Airport traffic

Average daily departure/arrival - 2025 and growth vs 2024

Top 10 airports
2025

See more

No.	Airport	Avg. daily dep/arr flights	% prev year	% 2019
1.	Istanbul	1,491	+6%	n/a
2.	Amsterdam	1,351	+1%	-3%
3.	London Heathrow	1,315	+1%	+0%
4.	Paris Charles de Gaulle	1,314	+3%	-5%
5.	Frankfurt	1,261	+5%	-10%
6.	Madrid Barajas	1,180	+3%	+1%
7.	Barcelona	989	+4%	+5%
8.	Munich	917	+3%	-19%
9.	Rome Fiumicino	884	+3%	+4%
10.	Athens	762	+6%	+26%

- **Athens** is a new entrant in the busiest 10 airports list, edging out since 2024 London Gatwick, which has dropped to 13th.
- **Istanbul** finished in top position for the fourth year in a row (1,491 daily flights, +6% vs 2024).
- **Amsterdam** stayed second with 1,351 daily flights, +1% vs 2024.
- **London Heathrow** in third with 1,315 daily flights was also +1%, marginally ahead of **Paris CDG** (just 1 flight less on 1,314, +3%).
- **Frankfurt** completed the top five with 1,261 daily flights, but 10% lower than 2024.
- Compared to 2019, the number of top 10 airports operating above 2019 levels has risen to five: **Athens**, **Barcelona** and **Rome** achieved this already in 2024, now joined by **Madrid** and **London Heathrow**.

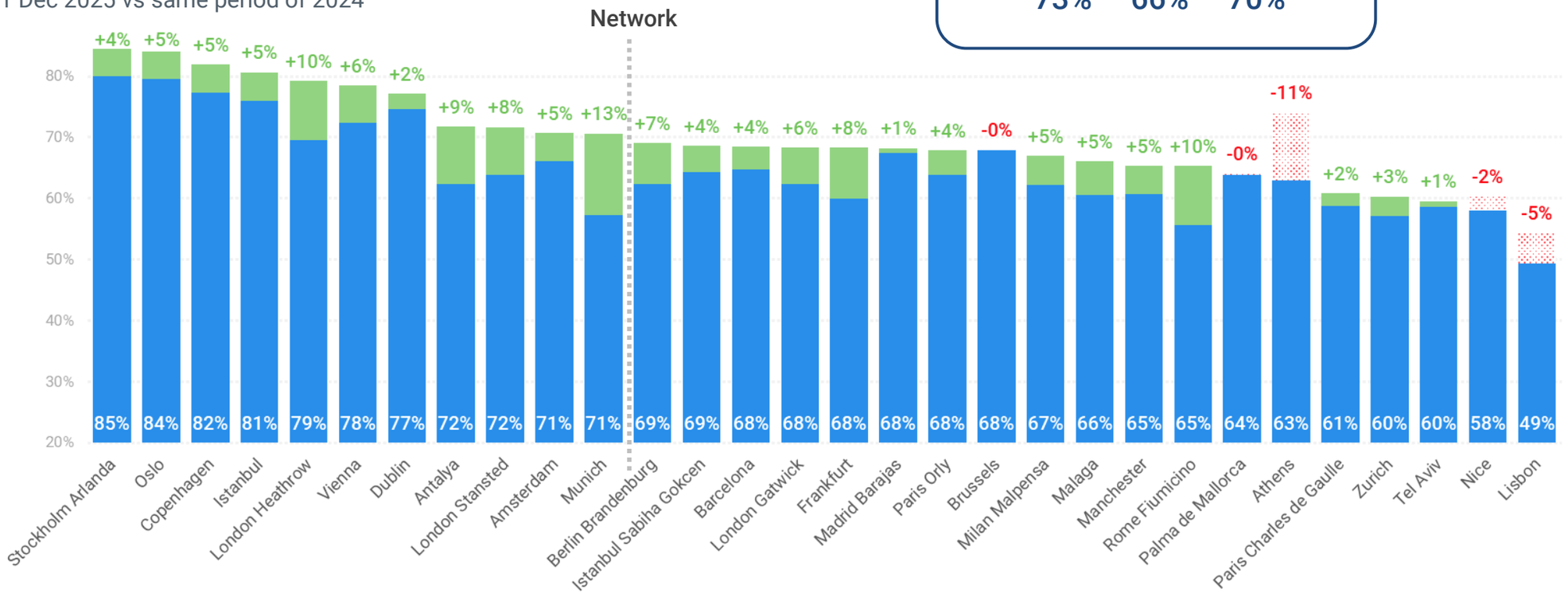
Airport departure punctuality

Departure Punctuality of top 30 European airports

1 Jan - 31 Dec 2025 vs same period of 2024

Network level:

2019	2024	2025
73%	66%	70%

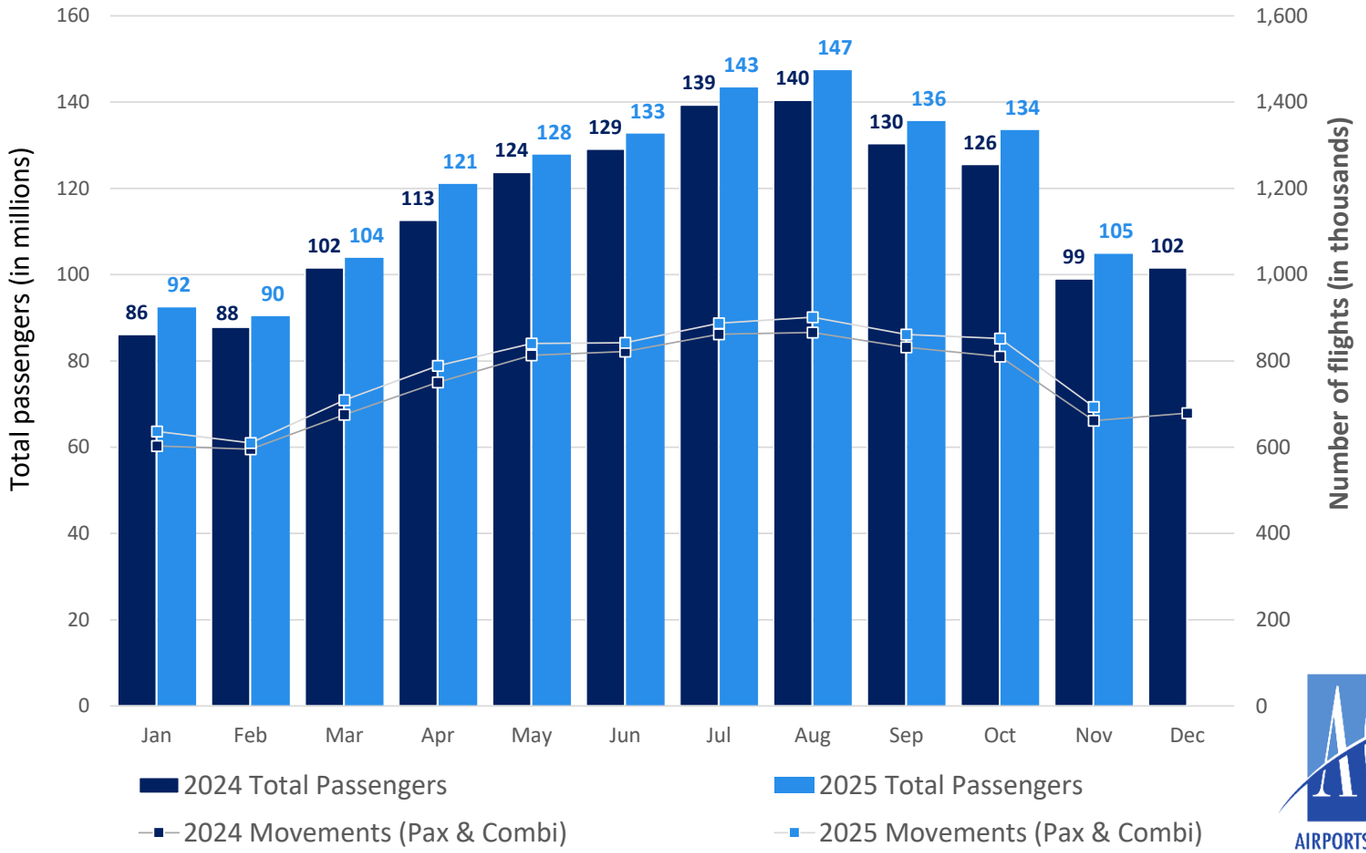


- **Departure punctuality** for all airports in the network in 2025 was **70.1%**, 3.9pp better than in 2024. This is a significant improvement, but still lags (-2.6pp) 2019 levels.
- In 2025, 25/30 busiest airports posted departure **punctuality improvements** compared to 2024, the largest being Munich (+13pp), Rome Fiumicino (+10pp), London Heathrow (+10pp), Antalya (+9pp) and Frankfurt (+8pp).
- **Worse punctuality** than 2024 were recorded by Athens (-11pp), Lisbon (-5pp) and Vienna (-2pp), while Brussels and Palma de Mallorca posted figures just slightly below 2024.
- Compared to 2024, when all 30 of these airports except Dublin posted worse departure punctuality than in **2019**, in 2025 11 recorded values above those of 2019. For the 19 airports still below 2019 levels, it should be noted that for 13 of them, traffic was higher than in 2019.

Top 40 European airports: passengers

Passengers and Flights at ECAC Top 40 airports

Jan - Nov 2025 vs same period of 2024



Airports Council International Europe estimates that 2025 will close with **2.62 billion passengers** flown in Europe*, 4.4% more than in 2024. Europe's airport network as a whole had already exceeded pre-pandemic peassenger levels in 2024.

Based on ACI EUROPE **passenger** data (December 2025 not yet available), and for the **busiest 40 European airports**:

- The **number** of **passengers**** was **1.33 billion** over the period January to November 2025, **4.5%** more than in **2024**, while the number of corresponding flights amounted to 8.62 million, a 6% increase on 2024. The respective **recovery** rates **on 2019** levels were **105%** in **passenger numbers** and 98% for flight movements.

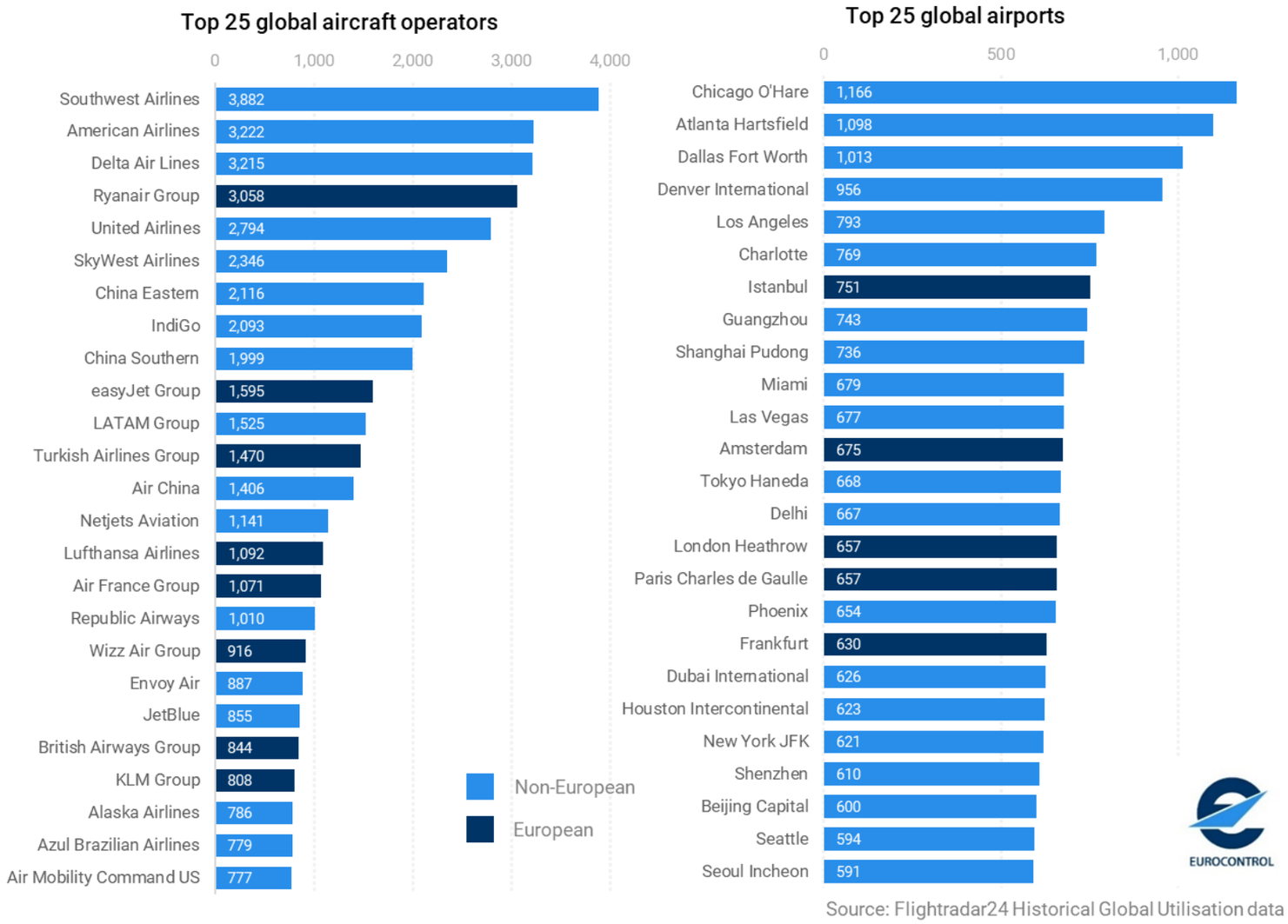
*: Europe for ACI covers 55 States, ACI EUROPE has recently expanded their monthly coverage to include over 450 airports, representing over 95% of European airport traffic.

**: Passengers comprise International enplaned + deplaned, Domestic enplaned +deplaned, as well as Transit passengers (counted once).

AIRPORTS COUNCIL INTERNATIONAL

Top 25 global aircraft operators and airports (departures)

Average daily departure flights, 2025



Source: Flightradar24 Historical Global Utilisation data

- **Aircraft operators:** in 2025, eight European aircraft operators were ranked in the top 25 global aircraft operators.
- Of those, two groups make it into the global top 10: Ryanair (4th) and easyJet (10th).
- The top 10 global aircraft operators is dominated by the US (five carriers), followed by Asia (three), and the above two in Europe.

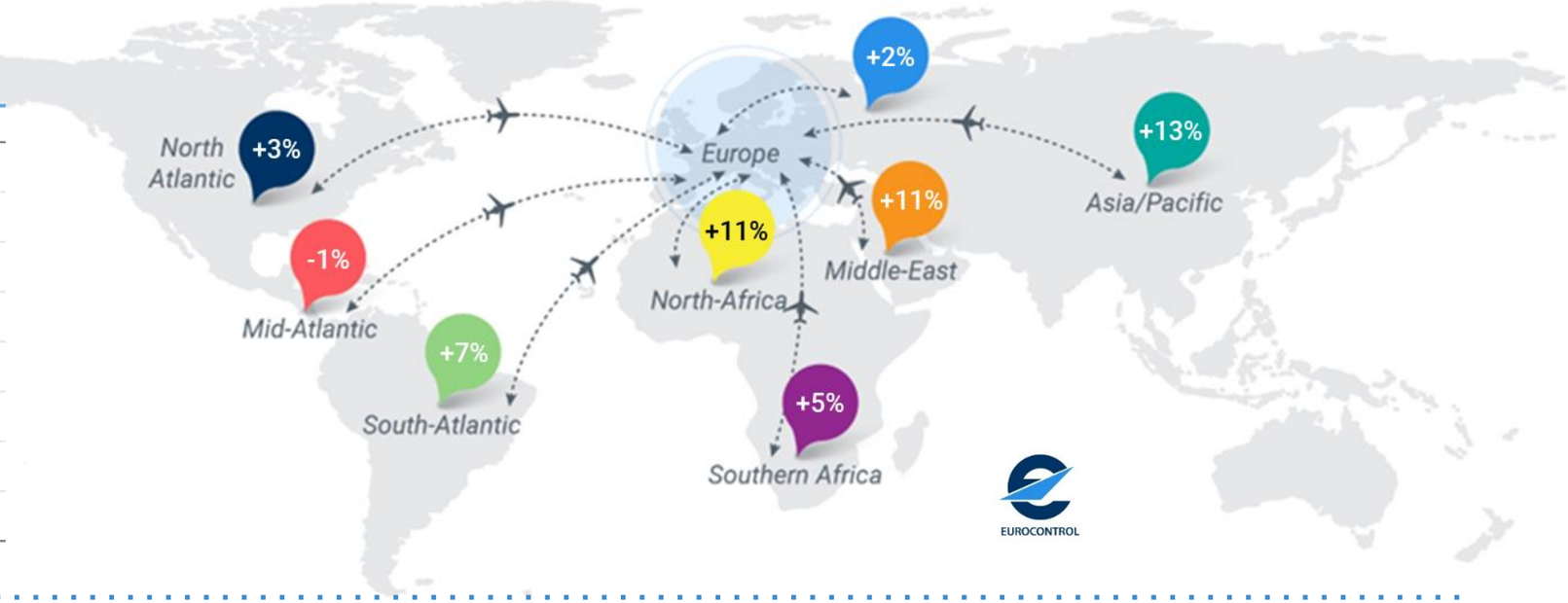
- **Airports:** in 2025 five European airports made the top 25 in terms of global airport departures.
- Istanbul (7th) was the only European airport to make the top 10, followed by Amsterdam (12th) and London Heathrow (15th) level with Paris CDG.
- The top 10 global airports continued to be dominated by the US (seven airports) with China a distant second (two).

Traffic flows

Average daily departure/arrival flights, 2025 compared to 2024 and 2019

Region	Average daily flights	% previous year	% 2019
Intra-Europe	23,305	+3%	-1%
Europe ↔ Middle-East	1,508	+11%	+6%
Europe ↔ North-Africa	1,375	+11%	+34%
Europe ↔ North Atlantic	1,369	+3%	+15%
Europe ↔ Asia/Pacific	969	+13%	+22%
Europe ↔ Other Europe	370	+2%	-64%
Europe ↔ Southern Africa	321	+5%	+3%
Europe ↔ Mid-Atlantic	176	-1%	+1%
Europe ↔ South-Atlantic	206	+7%	+11%
Non Intra-Europe	6,293	+8%	+2%

Percentage (%) of change 2025 vs 2024



- The **main** traffic flow was **intra-European** with 23,305 daily flights in 2025, +3% vs 2024. **Intercontinental** flows resulted in 6,293 daily flights in 2025, increasing by 8% compared to 2024. All intercontinental flows have recovered compared to 2019 (except "Other Europe" which mostly comprises the Russian Federation).
- The **second**-largest **regional** flow was between Europe and the **Middle East**: 1,508 daily flights in 2025. The region is becoming a major flight hub connecting Europe, Asia and Africa. The 11% jump is driven by recovery after the 2024 disruptions in the Middle East, as well as growth in European flows with Saudi Arabia (+23%) and the UAE (+7%).
- The **third**-largest flow was to/from **North Africa,** which overtook the North Atlantic flow in 2025 with 1,375 flights per day, a double-digit increase (+11%) vs the previous year owing to growing flows to/from **Egypt** (+18%), **Morocco** (+9%) and **Algeria** (+9%).
- The **fourth**-largest regional flow was to/from the **North Atlantic**, with 1,369 daily flights, a **3%** increase compared to 2024.
- Flows between Europe and **Asia/Pacific** posted a 13% increase in 2025 vs 2024. European flows with **China** (including Hong Kong) have continuously recovered, reaching 278 average daily flights in 2025 (+20% vs 2024). Other top flows recorded increases with Thailand (+18%) or Japan (+9%).
- Flows with Other Europe remain massively reduced at -64% compared to 2019.

Long-haul country pairs

Top 10 long-haul country pairs - 2025, compared to 2024 and 2019

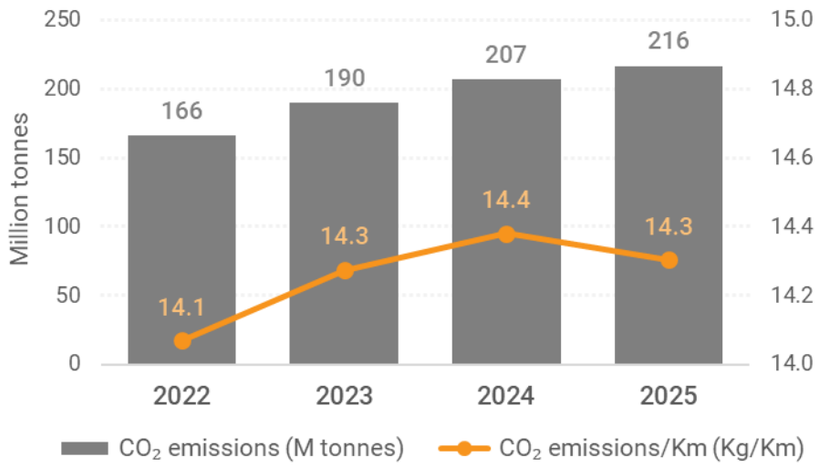
No.	Country pair	Average daily flights	% prev year	% 2019
1.	UK ↔ US	296	-1%	-0%
2.	Germany ↔ US	155	-0%	-2%
3.	France ↔ US	125	+0%	+11%
4.	Italy ↔ US	84	+9%	+38%
5.	Netherlands ↔ US	75	+0%	-1%
6.	Spain ↔ US	73	+8%	+16%
7.	Ireland ↔ US	70	+12%	+21%
8.	UAE ↔ UK	65	+4%	+3%
9.	Egypt ↔ Russia	47	+41%	N/A
10.	India ↔ UK	46	+8%	+50%

EUROCONTROL

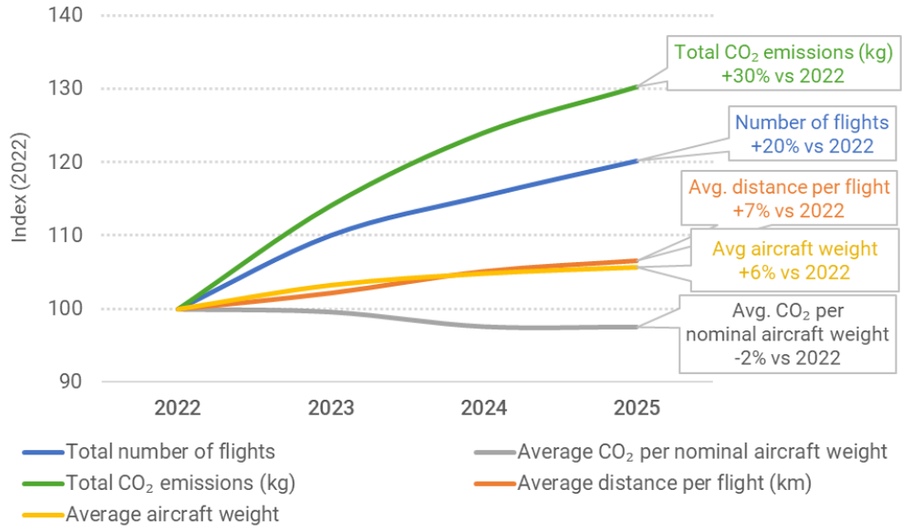
- Seven of the busiest 10 long-haul country pairs are with the US, the main three being between the US and UK, Germany and France.
- The only non-US-related long-haul flows within the top 10 are between UAE ↔ UK, Egypt ↔ Russia and India ↔ UK (i.e. overflying the network).
- Compared to the previous year, eight long-haul flows posted increases, notably Egypt ↔ Russia (+41%) owing to an increase of tourism flows to the Red Sea, and Ireland ↔ US (+12%) owing to Aer Lingus' expansion into secondary US markets with the A321XLR. Two flows saw a slight decrease, UK ↔ US (-1%) and Germany ↔ US (-0.2%).
- Six of the top 10 long-haul flows are currently above 2019 levels, notably Italy ↔ US (+38%), Ireland ↔ US (+21%) and Spain ↔ US (+16%). In contrast, the largest flows (UK ↔ US Netherlands ↔ US and Germany ↔ US) were all lower than 2019 but only marginally so (posting between -0% and -2% decreases).

Sustainability: CO_2 emissions

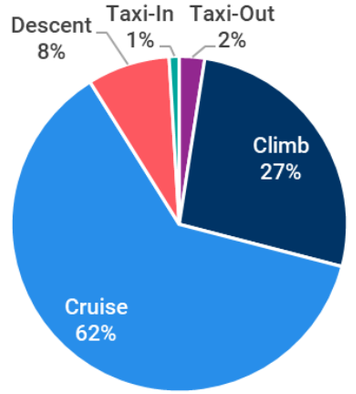
Total gate-to-gate CO_2 emissions in the NM area



Evolution of total CO_2 emissions and contributing factors



CO_2 emissions by flight phase*

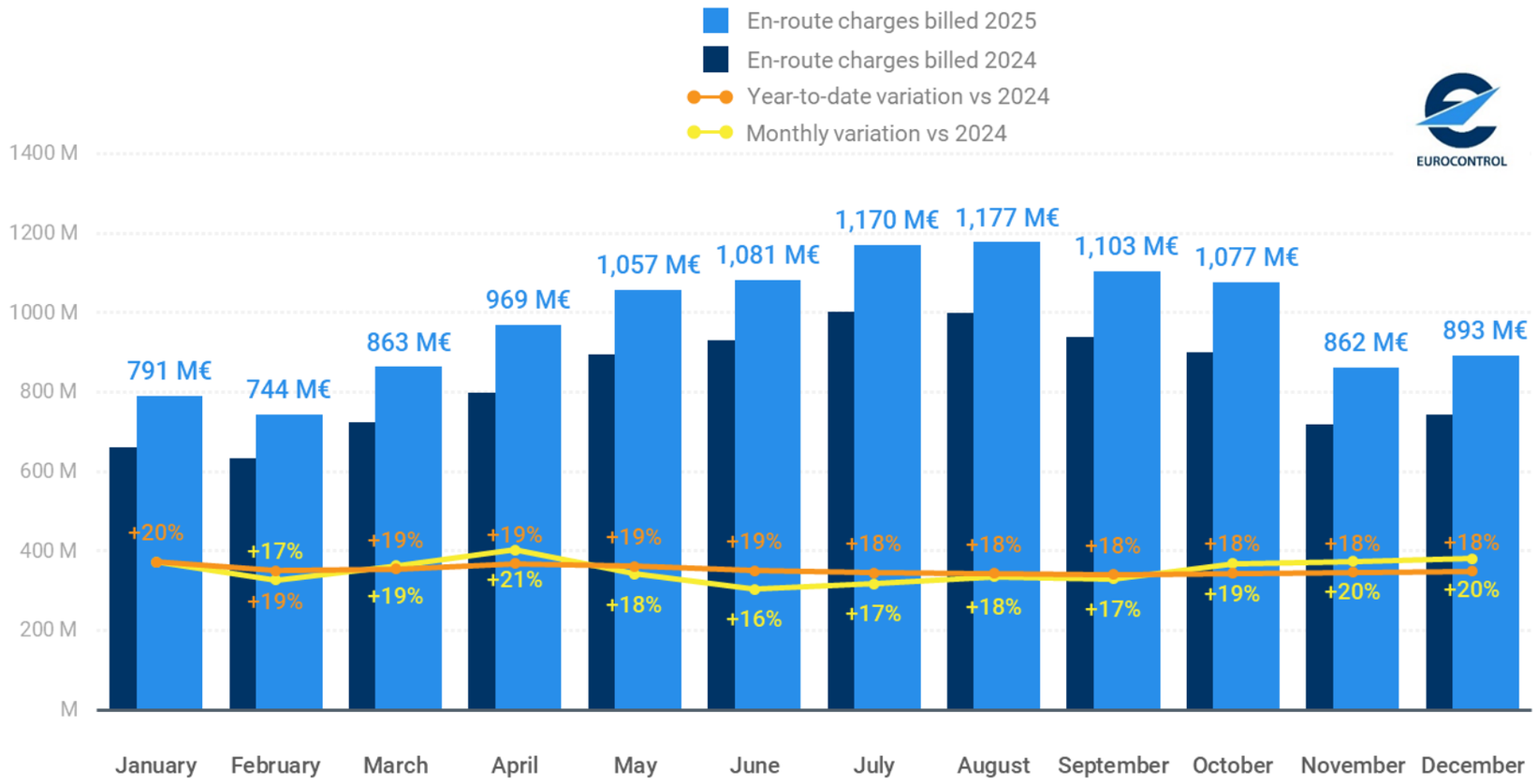


** Data for January-November 2025 only, as no taxi-in data was yet available for December 2025.*

- In **2025, gate-to-gate CO_2 emissions** totalled 216 M tonnes, +5% higher than in 2024. Although the number of flights increased by 4% during the same period, CO_2 emissions per kilometre decreased by -1% to 14.3 kg/km.
- The **cruise** phase has the highest share of emissions (62%), followed by the **climb** phase (27%), which can be related to high-power settings to climb to cruising altitude and higher weight compared to the descent phase (8%). The higher weight on take-off also affects emissions when comparing the taxi-out and taxi-in phases.
- Total CO_2 emissions have increased faster (+30%) than the number of flights (+20%) compared to 2022, mostly due to the fact that 2025 flights were on average longer and tended tp be operated by heavier aircraft.
- Given that the cruise flight phase has the highest share of emissions and longer flights imply longer cruise phases, emissions per flight is higher. It should also be noted that over the **2022-2025** period, the **average flight distance** in the **NM area** has **increased** by **7%.**
- **Average aircraft weight** has also gradually increased over the 2022-2025 period (**+6%**). This has had an impact on all flight phases and has contributed to the increase in emissions per flight. Conversely, the **CO_2 emissions per** unit of **weight** has **decreased** by **-2%** over the period, showcasing the gains in fuel efficiency of new-generation aircraft.

En-route air navigation charges for the EUROCONTROL area

2025 amount billed: 11,788 M€ (+18% vs 2024)

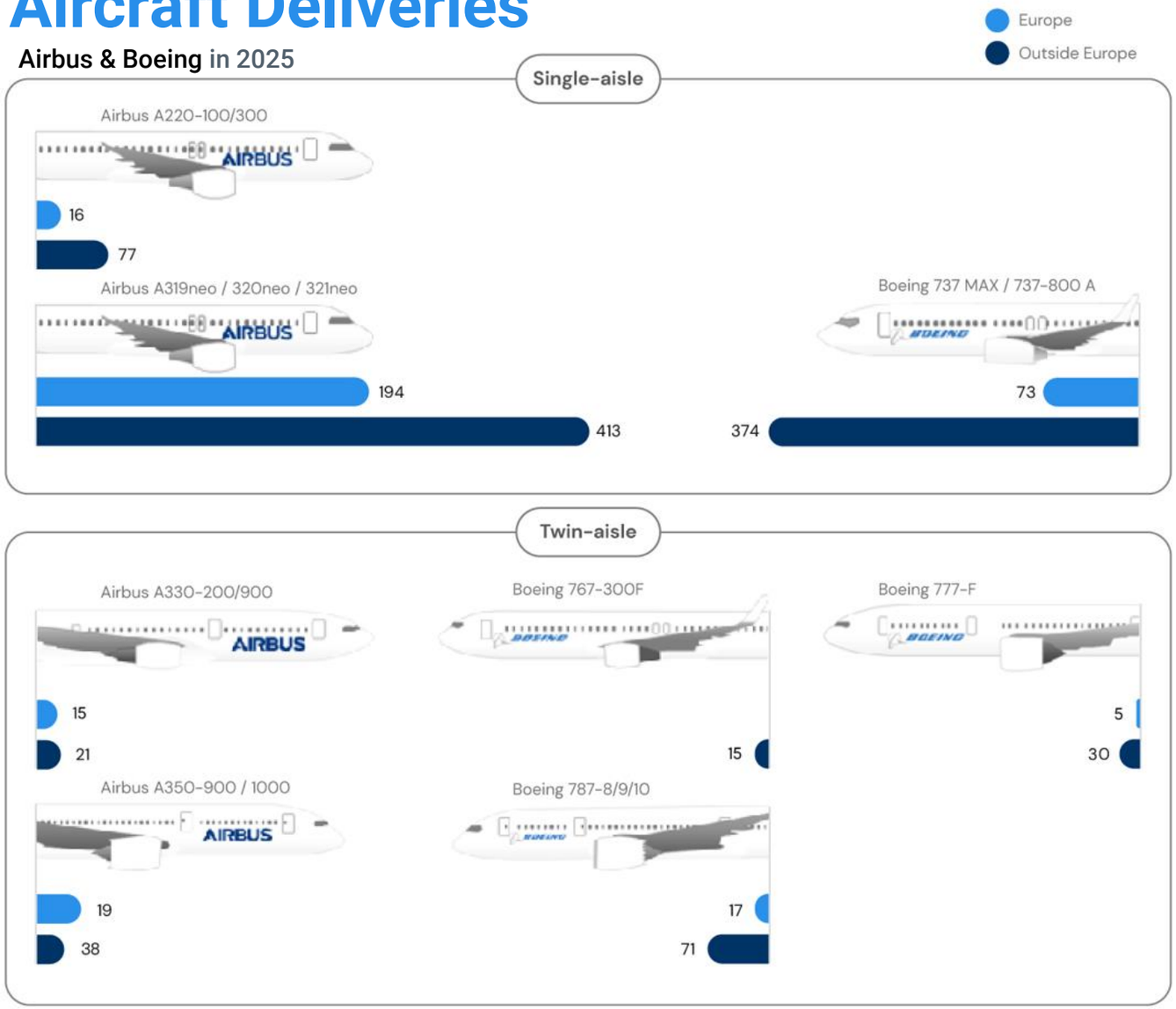


- En-route charges billed in **2024** amounted to **11,788 M€, 18% more (by 1,836 M€) than in 2024.** This amount is also +49% (3,891 M€) vs 2019 in nominal terms.
- This 18% increase vs 2024 whereas flights are only +4% can be explained as follows:
  - The average **distance** per flight has increased by **+2%**
  - The average **aircraft weight** per flight has increased by **+1%**
  - The average **en-route unit rate** has increased by **+11%** in real terms.
- It should be noted that since 2023, a part of the increase in Unit Rates includes 2020-2021 under-recoveries, covering all SES* States.
- The variation in billed en-route charges (nominal terms) with respect to 2019 is mostly due to higher Unit Rates (+40%), although this increase only amounts to +5.8% in real terms (in € 2025).

* SES: Single European States.

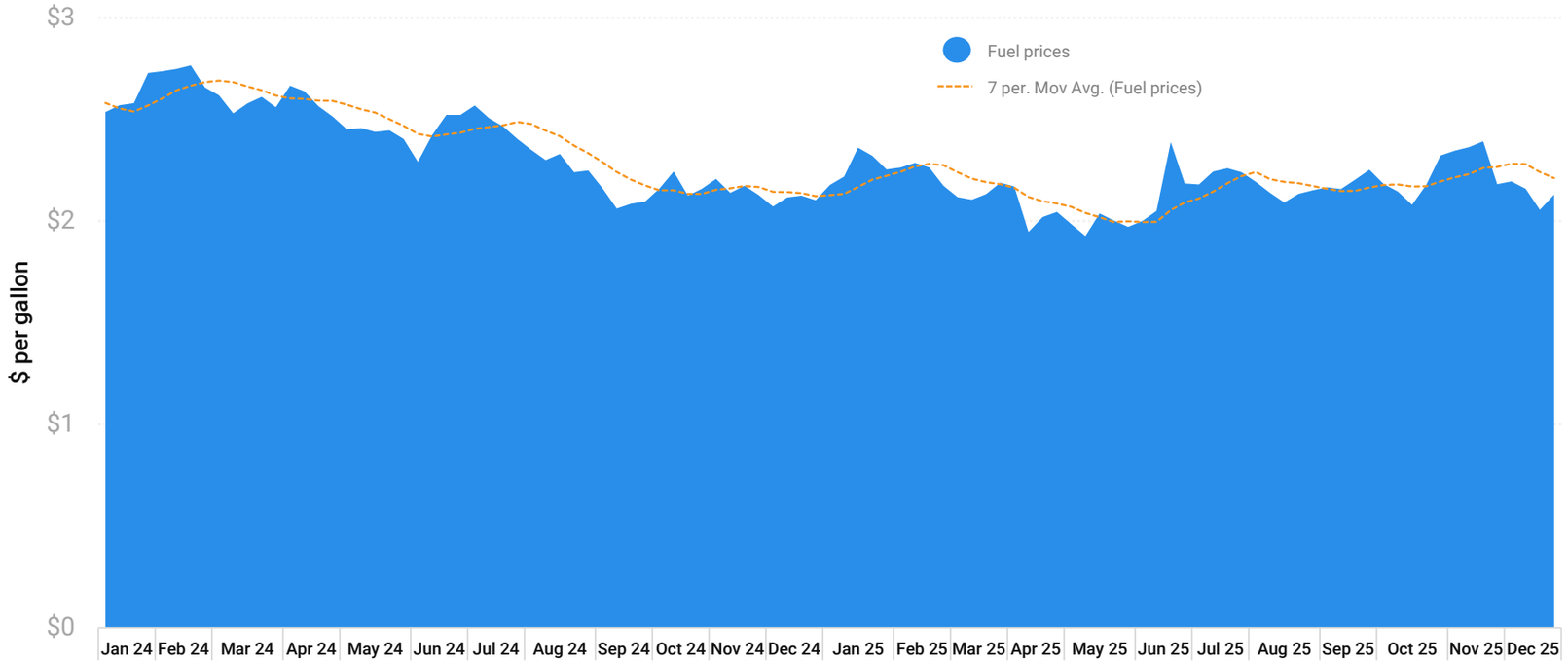
Aircraft Deliveries

Airbus & Boeing in 2025

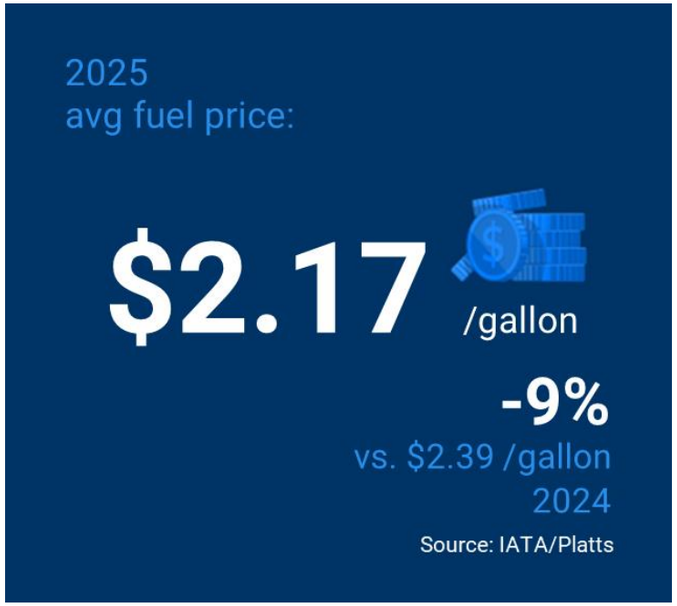


- In 2025, **Airbus** delivered 793 commercial aircraft; 36% or 208 units more than its closest rival **Boeing** on 585, which was however its strongest annual delivery rate since 2018. Compared to 2024, Airbus deliveries have increased by 4%, whereas Boeing's rose significantly by 73%.
- In the **European market**, **Airbus** recorded 244 deliveries, accounting for 31% of its total deliveries; **Boeing** delivered 95 aircraft, representing 16% of its total.
- Narrow-bodies dominated deliveries for both manufacturers. Airbus delivered 700 A220–A321neo family aircraft, representing 88% of its total deliveries, while Boeing delivered 447 737 MAX aircraft, or 76% of its total.
- Overall, Airbus delivered 57% more narrow-body aircraft than Boeing, with the A321neo serving as its core product and accounting for 55% of Airbus narrow-body deliveries (387 units).
- For the first time in seven years, Boeing outpaced Airbus in gross orders, securing 1,175 aircraft compared to Airbus's 1,000.

Jet fuel price (Europe)



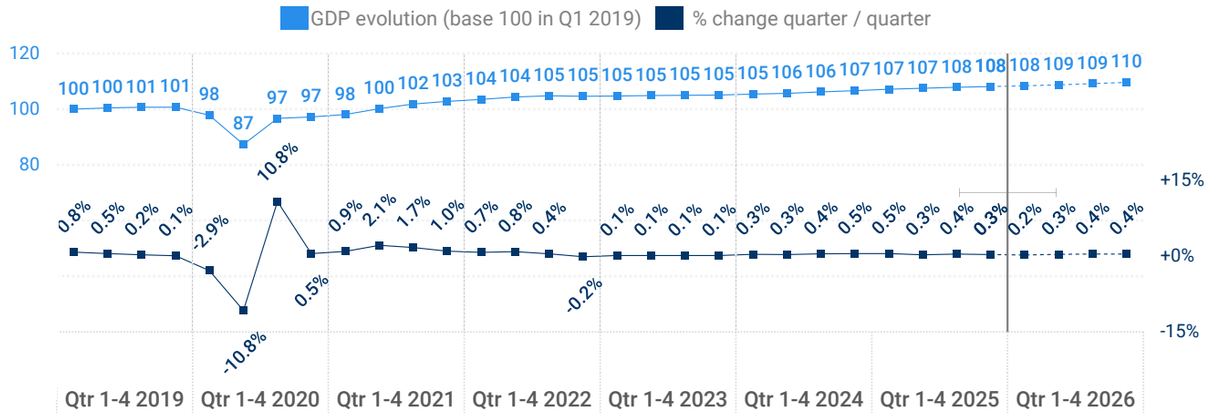
Source: IATA/Platts



- In 2025, the average **price** of **jet fuel** stood at **$2.17**/gallon, **9.2% lower** than in 2024 ($2.39/gallon).
- Based on a moving average trend, 2025 fuel prices in Europe started at around $2.27/gallon, were volatile during the second quarter, oscillating between $1.93 and $2.39/gallon, and ended the year slightly lower than they began at $2.13/gallon in December 2025.
- Starting in April 2025, the eight OPEC+ countries have gradually been unwinding 2.2 million barrels per day of voluntary cuts as agreed in December 2024, with the flexibility to adjust based on market conditions. After delayed increases, output rose by 548K barrels per day in August 2025 and smaller increases followed until December 2025. Due to oversupply risks and weak demand, further increases are likely to be paused during the first quarter of 2026, but up to 1.65 million barrels per day could return if conditions improve. Full unwinding is expected to extend to the end of 2026. Fuel prices have generally declined since early 2024. The 2025 market experienced a cautious phased return in a difficult geopolitical context putting pressure on prices, resulting in a volatile but generally lower-priced oil market.

GDP in the European Union

Constant prices and exchange rate in euro, since 2019



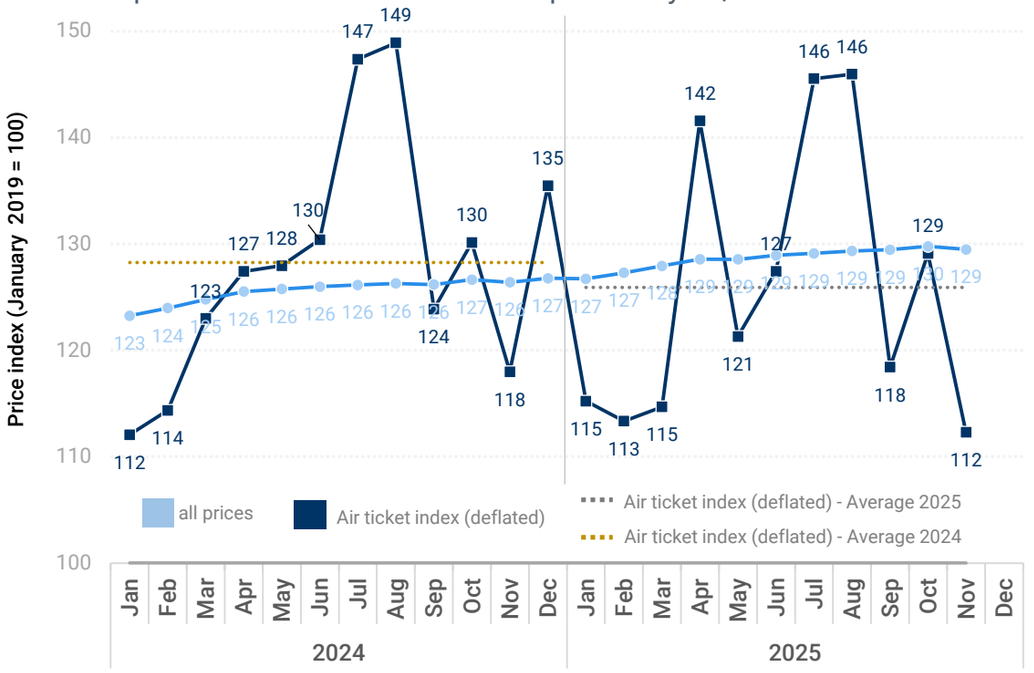
Source: Oxford Economics Ltd.
Last Update: Jan. 2026

The latest information from Oxford Economics (OE) shows that:

- In 2025, the **EU27 economies** posted **positive** but **weak growth** across the year. The zone's economy expanded by **0.5%** in **Q1** (quarter-on-quarter) and slowed down to 0.3% and 0.4% in Q2 and Q3 respectively. Q4 is expected to record 0.3% quarter-on-quarter growth.
- EU27 GDP is likely to post a **1.6% increase for 2025** vs 2024, in line with previous expectations and improving on 2024 (+1.1%).
- **EU27** GDP **growth** forecast is for **1.2% in 2026** (vs 2025) in the base scenario. GDP growth is expected to gradually gain pace over the course of this year and expand by **1.7% in 2027** vs 2026.
- The OE forecast also includes different scenarios: a tech downturn, a worst-case trade war, tighter fiscal policy on the downside, and a trade/AI boom on the upside.
- These scenarios drive tourism fundamentals such as GDP, prices and consumer spending. A common theme is trade policy uncertainty and its effects on global trade, inflation, household incomes and travel demand.

Price change per month (EU27)

Values compared to the same month of the previous year, since 2024



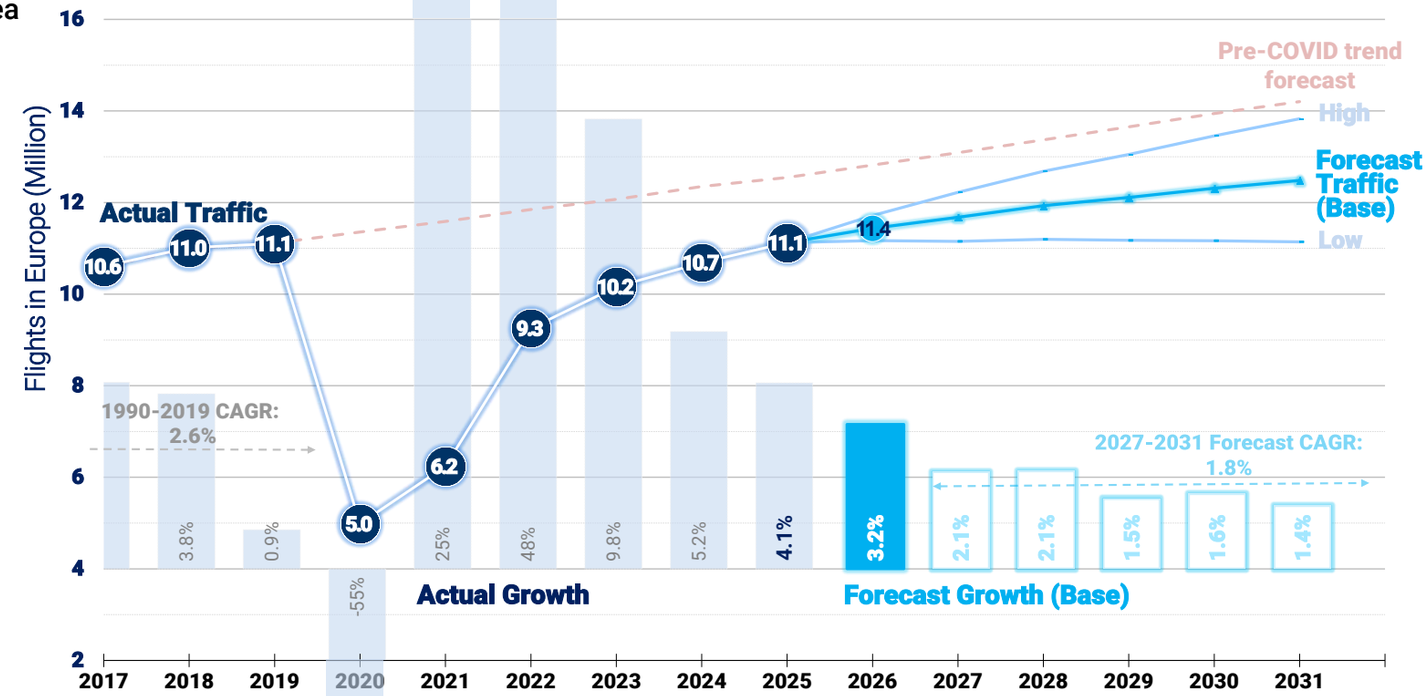
Source: EUROSTAT

The latest information from EUROSTAT for the EU27 shows that:

- **Overall, all-prices** inflation in **2025** was **2.5% higher than** in **2024**.
- **Air ticket prices** were **slightly lower (-1.3%) in real terms** for Jan-Nov 2025 compared to the same period in 2024.
- Apart from January and April (an Easter hike), air fares were lower in 2025 than in 2024, even if there was a notable (and typical) seasonal increase in prices at the beginning of the summer period. As a consequence, 2025 summer air ticket prices were on average 3% lower than in Summer 2024.
- That said, **air ticket prices (excluding inflation)** remain **9% higher** than pre-pandemic (**2019**).

EUROCONTROL 7-Year Forecast Update for Europe* 2026-2031

Actual and future IFR movements, *NM Area



- The **NM area** recorded **11.1 million flights** in 2025, **+4.1%** flight growth (in total terms°) and in line with the base scenario of the STATFOR forecast published in October 2025.
- For **2026**, **Europe** (the NM area) is forecasted to achieve a flight growth rate of +3.2% (11.4 million flights in the base scenario) ranging from 1.3% (low scenario) to 5.1% (high scenario). In all of this, uncertainty remains significant, reflecting ongoing geopolitical, economic and regulatory risks.
- Growth is supported by **resilient** demand for **leisure** and to visit **friends & relatives**, **dynamic low-cost** carriers, and **strong extra-European** flows (to the Middle East, North Africa and North Atlantic). Strong divergence will persist as southern leisure-oriented destinations lead growth, while several northern/hub-dependent States remain below pre-COVID levels.
- **Between 2027 and 2031**, flight growth is expected to average 1.8% annually (±1.7pp), a **more modest rate** than in pre-COVID times.
- This forecast assumes current routings as the baseline. Improved/worsened conditions in conflict areas would bring greater volatility, especially on extra-European flows (e.g. Asia/Pacific-related) and on overflights.

SUPPORTING EUROPEAN AVIATION

EUROCONTROL

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.

For more information please contact aviation.intelligence@eurocontrol.int

NM Area: the geographical area that is within Network Manager's responsibility (NM area) covering the 42 EUROCONTROL member states. More information on the NM Area available at www.eurocontrol.int/publication/reporting-assumptions-and-descriptions.

ECAC Area: the European Civil Aviation Conference (ECAC) is an intergovernmental organization which was established by ICAO and the Council of Europe. ECAC totals 44 members, including all 27 EU, 31 of the 32 European Aviation Safety Agency member states, and all 42 EUROCONTROL member states. More information on the ECAC area available at www.ecac-ceac.org/about-ecac/member-states.

EUROCONTROL Airlines Group: in this report, EUROCONTROL presents information related to airlines groups according to level 1 (airlines are grouped with their subsidiaries). Definition is available at www.eurocontrol.int/directory/airline-groups-lookup.

EUROCONTROL Market Segment rules: EUROCONTROL has a definition for air traffic market segments based on lists of aircraft types, aircraft operators and the ICAO flight types filed on flight plans. This definition is regularly updated and available at : https://www.eurocontrol.int/publication/market-segment-rules.

© EUROCONTROL - 2026

This document is published by EUROCONTROL for information purposes. It may be copied in whole or in part, provided that EUROCONTROL is mentioned as the source and it is not used for commercial purposes (i.e. for financial gain). The information in this document may not be modified without prior written permission from EUROCONTROL.

www.eurocontrol.int