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EUROPEAN AVIATION OVERVIEW

15-21 Sep 2025

Thursday 25 September 2025

Headlines

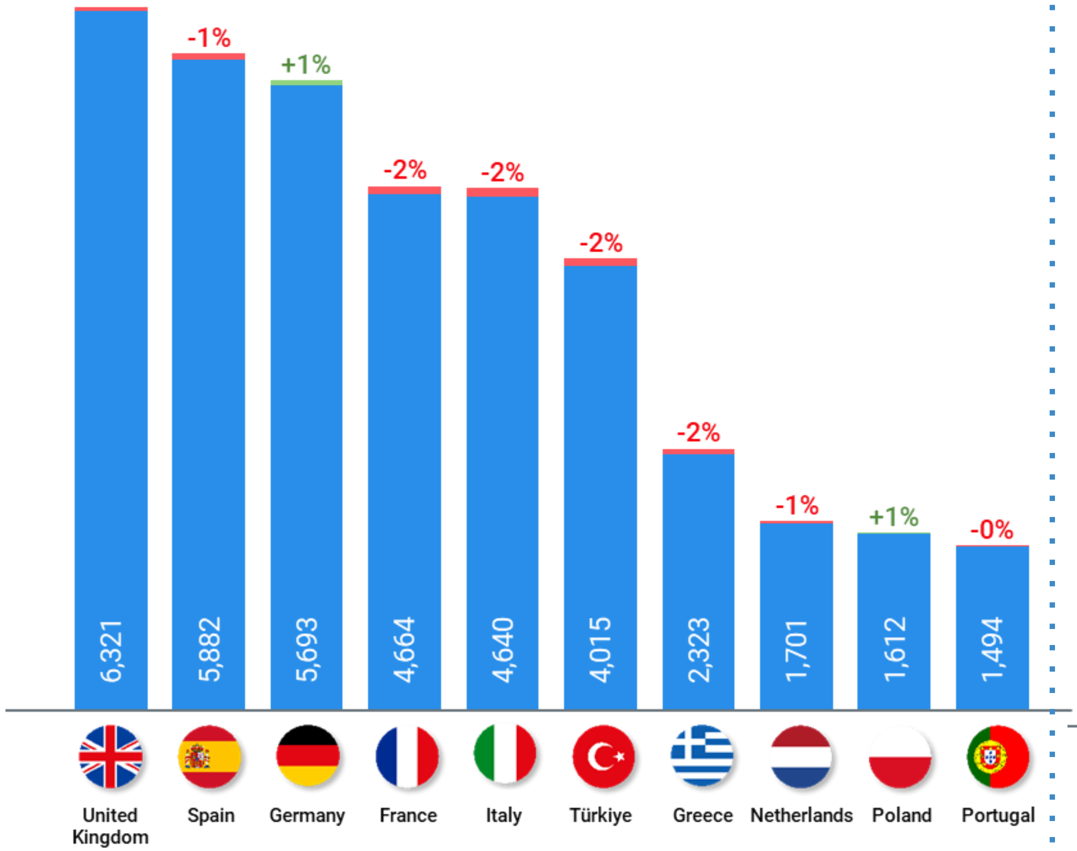
(Week 38 – 15-21 Sep 2025)

- The network recorded 34,781 average daily flights in Week 38 (+3.6% vs 2024), slightly above 2019 levels (+1%) and dipping slightly vs Week 37 (-0.5%).
- On average, the top 10 carriers operated at lower capacities (-0.7%) compared to the previous week. Similarly, the busiest 10 States saw overall flights decrease by 0.9%.
- Year-to-date traffic is 99% of 2019, 4% more than 2024, in line at network level with the latest EUROCONTROL STATFOR traffic forecast released in February 2025.
- Several airports (Brussels, London Heathrow, Berlin and Dublin) experienced a cyberattack affecting check-in and boarding systems, leading to some cancellations and delays.
- Arrival and departure punctuality were 71.7% and 65.3% respectively, better than 2024 but worse than 2019.
- En-route ATFM delays were +10% vs Week 37, with a daily average of around 89,000 minutes, +35% vs 2024. Total ATFM delay per flight was 3.4 min/flight (2.6 for en-route and 0.8 for airports).
- Top en-route ATFM delay causes: ATC capacity/staffing (59% of delays), weather (17%) and ATC disruptions (13%).
- Marseille, Reims, Budapest, Belgrade and Sarajevo ACCs contributed the most to en-route ATFM delays.
- Average jet fuel price: 2.20 USD/gallon (19.09), +2% vs two weeks earlier.

Top 10 busiest States

On week 15-21 Sep 2025

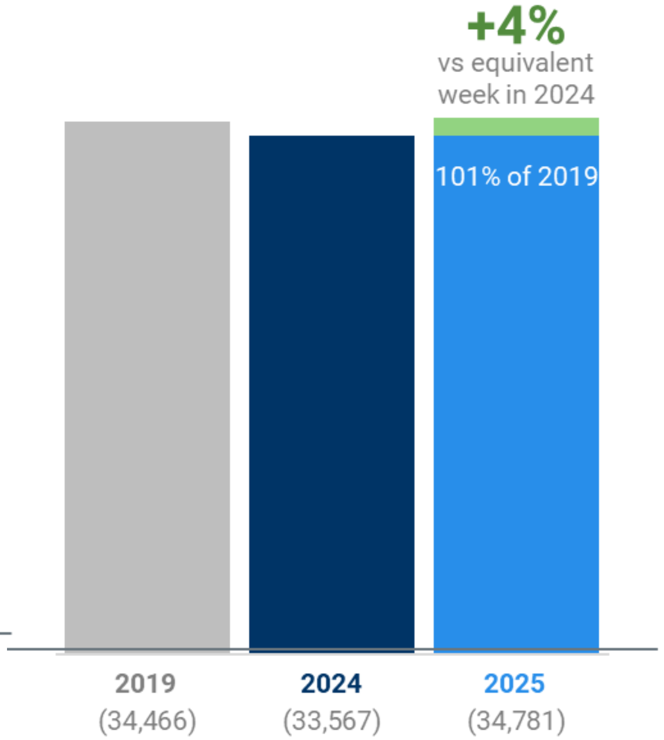
(all flights excl. overflights compared with previous week)



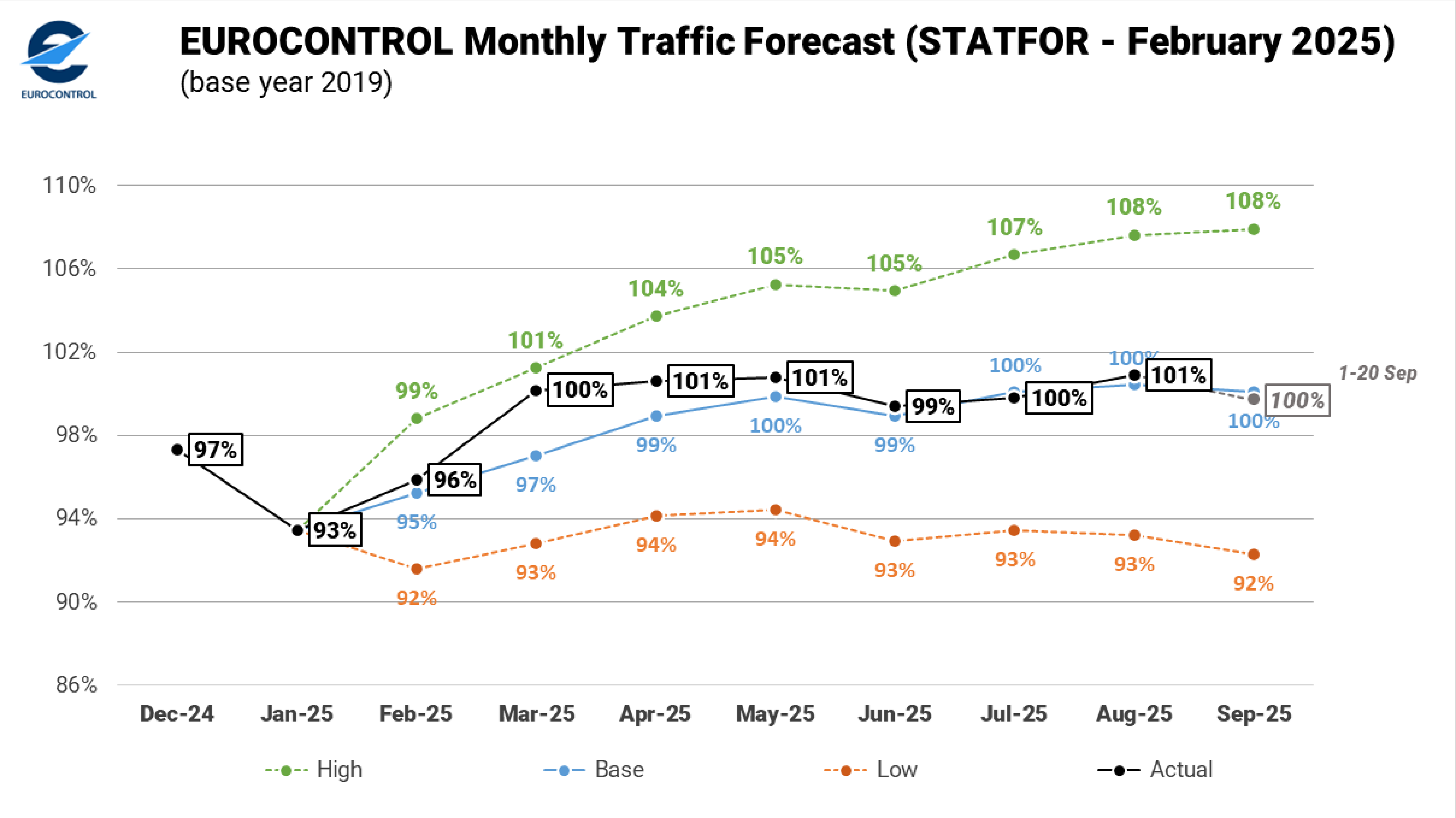
Traffic situation

Average daily flights (including overflights)

Week 15-21 Sep 2025



Overall situation compared to the EUROCONTROL Monthly Traffic Forecast



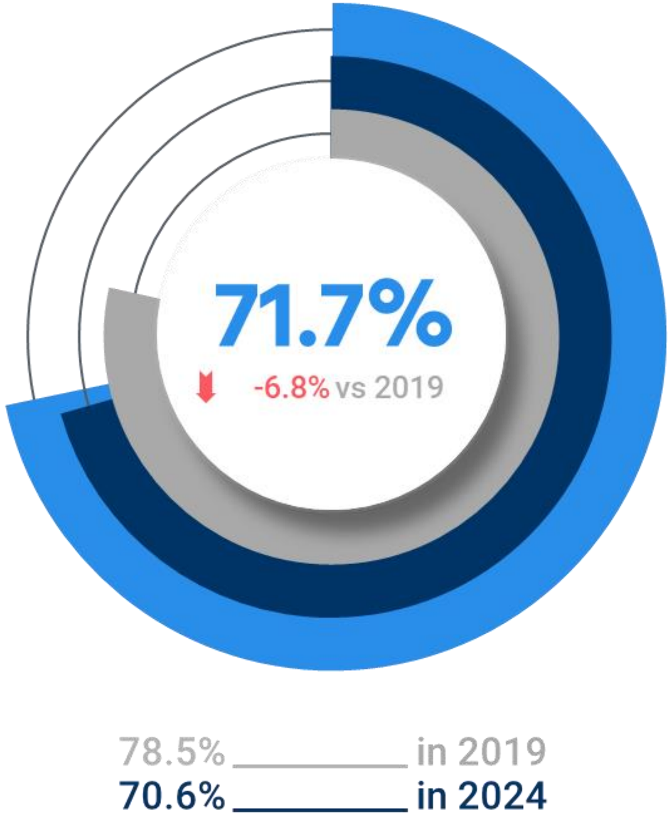
- The latest EUROCONTROL STATFOR flight forecast (2025-2031) was published on 28 February 2025. Since that date, and up to August 2025, European air traffic has evolved largely in line with the base scenario at network level.
- An updated forecast will be published in mid-October 2025.
- In August 2025, flights closed at slightly above August 2019 levels (+1%).
- The first 20 days of September are also in line with the base scenario at the moment.
- On a year-to-date basis, network traffic is at 99% of 2019, and +4% vs 2024.

Arrival & departure punctuality

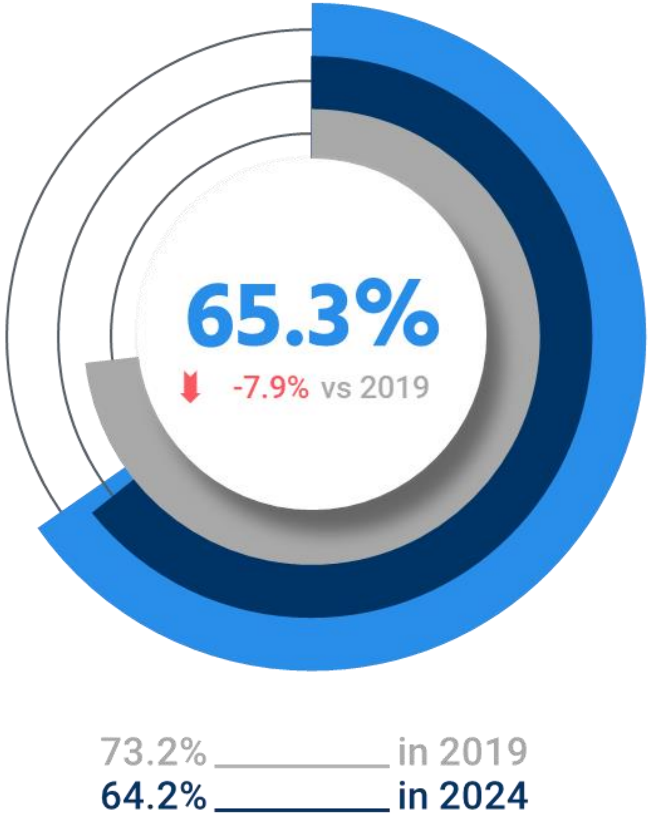
(all network scheduled flights)

Week 15-21 Sep 2025

ARRIVAL PUNCTUALITY



DEPARTURE PUNCTUALITY



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

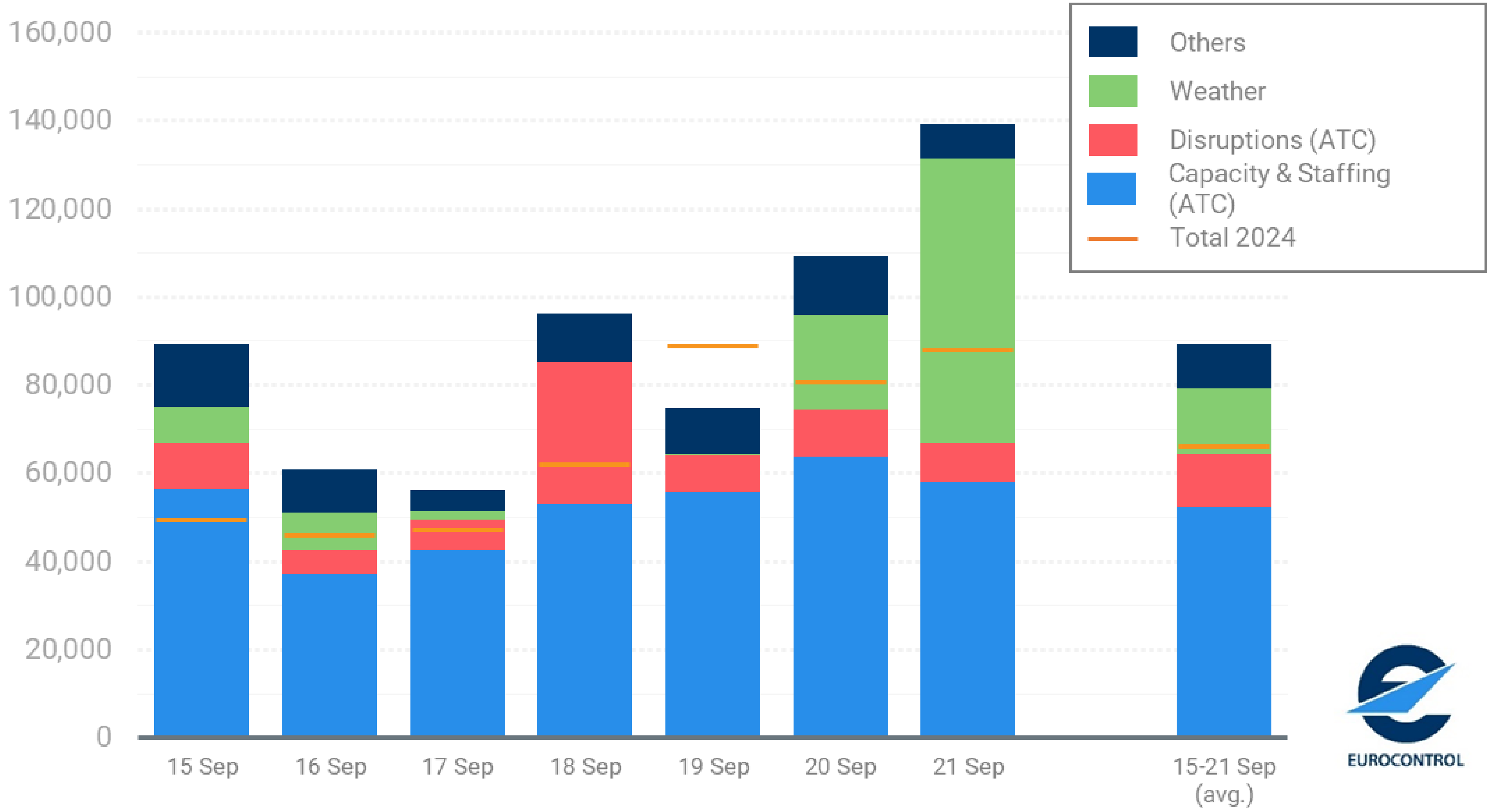
- At network level, arrival punctuality (71.7%) was 1.1pp better compared to the equivalent week of 2024; departure punctuality (at 65.3%) improved by the same amount.
- However, compared to the same week in 2019, both arrival and departure punctuality were worse (-6.8pp and -7.9pp respectively).
- Amsterdam saw high delays due to strong winds and thunderstorms, mainly on 15 and 16 September.
- Tel Aviv saw daily ATFM regulations due to multiple factors affecting ATC and airport capacity.
- Barcelona recorded the majority of its delays on one day (21 September), when adverse weather affected operations.
- Athens continued to see daily delays due to ATC capacity causes.
- Gatwick experienced high delays during the week owing to weather regulations, low visibility risks and airport capacity issues.

CB: Cumulonimbus. TS: Thunderstorms. LVP: Low visibility Procedure.

En-route ATFM delays

Delays per cause (EUROCONTROL area)

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

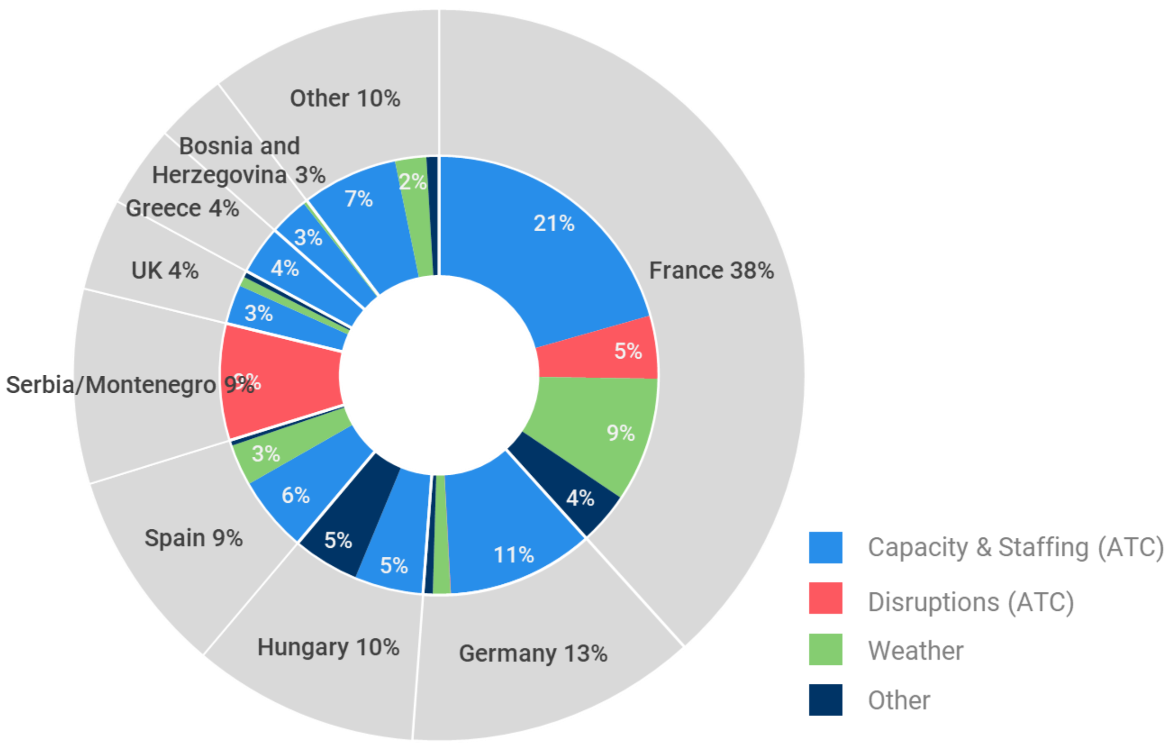


- Week 38 registered higher en-route ATFM delays compared to Week 37 (+10%), with an average of 89,393 daily minutes; this was 35% higher than the same operational week in 2024.
- ATC capacity/staffing issues were responsible for 59% of all en-route ATFM delays (notably in France and Germany).
- Weather accounted for 17% of all en-route ATFM delays (mainly in France).
- ATC disruptions accounted for 13% of all en-route ATFM delays (mainly in Serbia/Montenegro and France).
- There were 3.4 minutes of total ATFM delay per flight in Week 38, made up of 2.6 min/flight en-route delay, and 0.8 min/flight airport delay.

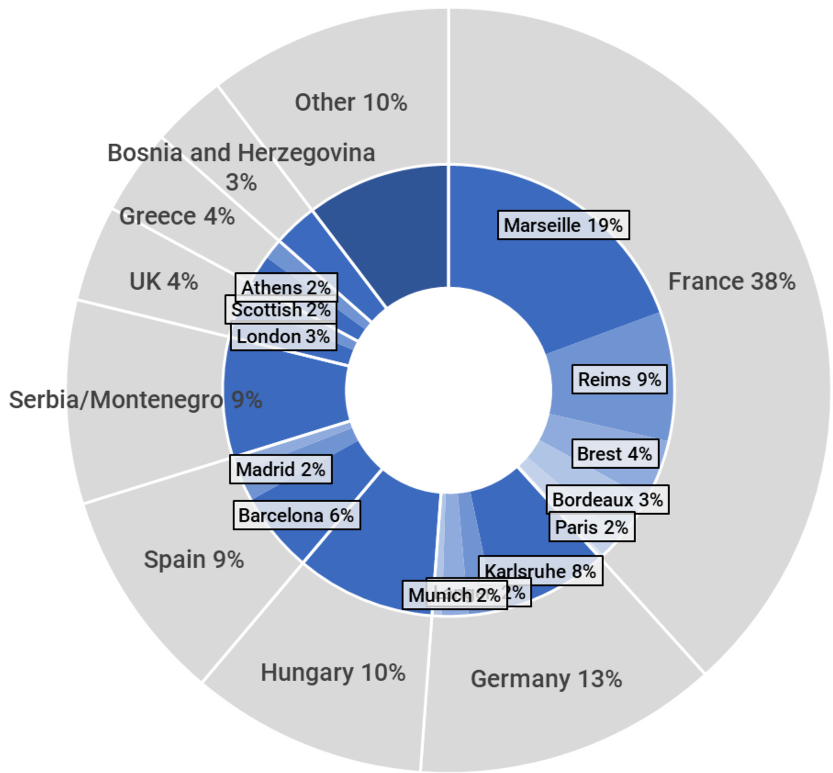
En-route ATFM delays per State, per cause and per ACC

Week 15-21 Sep 2025

En-route ATFM delays (per cause) and for top 8 States

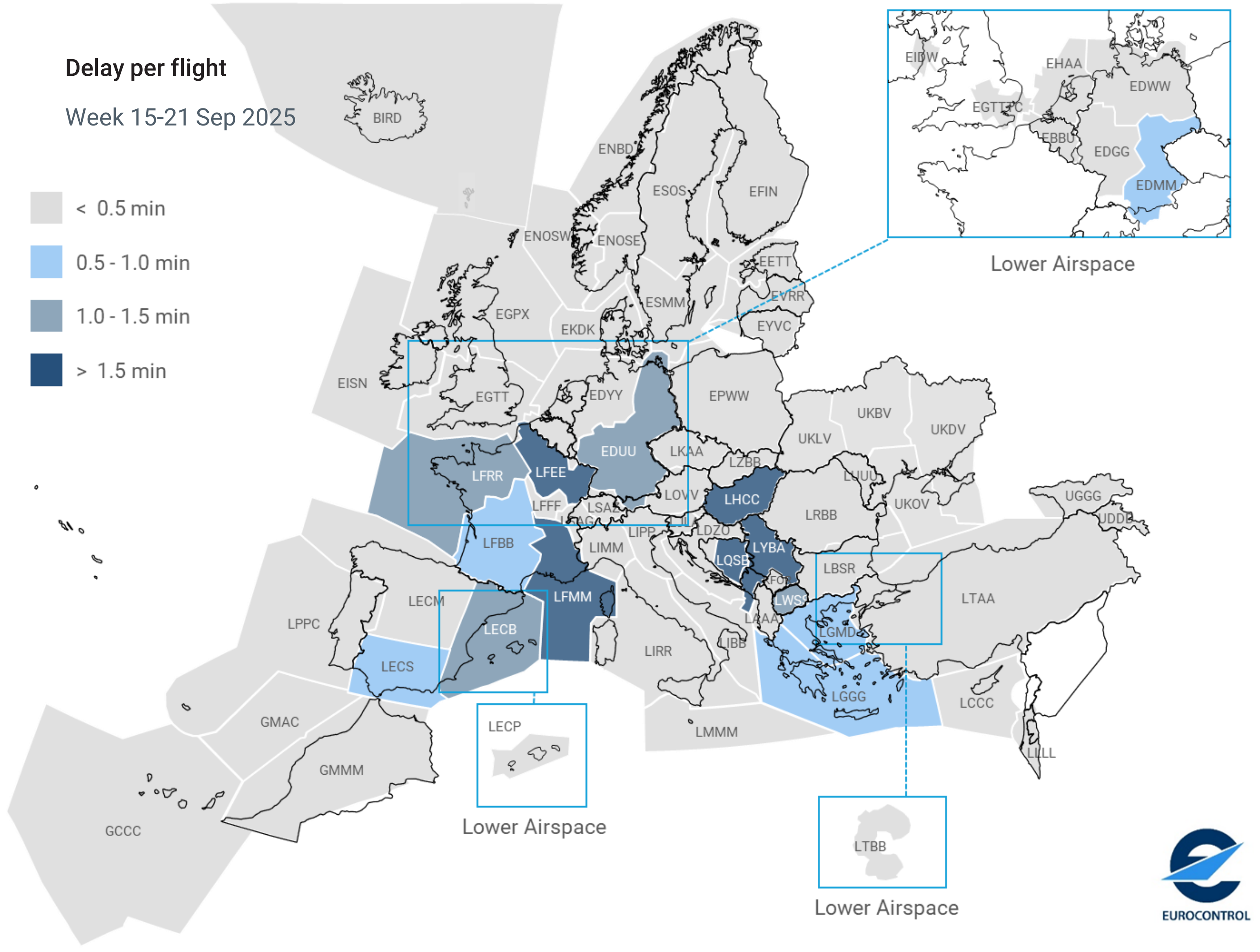


En-route ATFM delays per ACC for top 8 States



- France accounted for 38% of en-route ATFM delays, mainly at Marseille-East (19%) and Reims ACCs (9%); these were primarily owing to capacity & staffing (21%) and weather (9%).
- Germany made up 13% of en-route ATFM delays; these were mainly attributed to Karlsruhe UAC (8%) and down to capacity & staffing issues (11%).
- Hungary accounted for 10% of en-route ATFM delays.
- Spain comprised 9% of en-route ATFM delays; these were mainly attributed to Barcelona ACC (6%).
- Serbia/Montenegro had a 9% share of en-route ATFM delays, mainly due to the ongoing ATC strike.

En-route ATFM delayed flights per Area Control Centre (ACC)



- In Week 38, nine ACCs recorded en-route ATFM delays higher than 1.0 min/flight, notably:
- Marseille ACC: Thursday's nationwide ATC industrial action limited sector availability in both the eastern and western sector groups. Apart from Thursday, both sector groups continued to generate notable ATC capacity & staffing delays on a daily basis, although more severe in the east. Intense clustered convective weather cells complicated traffic management in both sector groups on Sunday.
- Reims ACC: While no ATFM delay was attributed to the Thursday ATC industrial action, ATC capacity & staffing delays were generated on a daily basis, with convective weather an issue at the weekend.
- Budapest ACC: Sector availability was limited due to controller fatigue at the end of an intense summer. Additional traffic avoiding Ukrainian airspace triggered measures in their eastern and northern sectors daily, together with standard capacity delays for other sectors. Traffic demand was +35% above 2019 levels.
- Belgrade ACC: Daily ATFM delays were faced due to the ongoing ATC industrial action, which has limited sector capacities. This is foreseen to continue until further notice.
- Sarajevo ACC: Capacity delays affected the ACC throughout the week, coupled with weather delays on Wednesday, and some staffing issues on Tuesday and Thursday.

Busiest 10 States

Departures and arrivals

Week 15-21 Sep 2025

No.	Country	Average daily flights	% prev week	% prev year	% 2019
1.	United Kingdom	6,321	-1%	+1%	-5%
2.	Spain	5,882	-1%	+3%	+10%
3.	Germany	5,693	+1%	+3%	-11%
4.	France	4,664	-2%	+1%	-3%
5.	Italy	4,640	-2%	+2%	+11%
6.	Türkiye	4,015	-2%	+11%	+20%
7.	Greece	2,323	-2%	+3%	+22%
8.	Netherlands	1,701	-1%	-2%	-8%
9.	Poland	1,612	+1%	+8%	+25%
10.	Portugal	1,494	-0%	+5%	+17%

See all States

- The busiest ten States recorded in aggregate 0.9% fewer flights during Week 38 than in the previous week, with only two of these States, Germany and Poland, posting an increase on Week 37.
- All ten busiest States except the Netherlands posted increases in arrivals and departures on the same period in the previous year.
- France, Italy, Türkiye and Greece recorded the highest decreases among this list (all -2% on the previous week), owing mainly to:
  - France: decreases on many flows, notably with Algeria, Italy, Tunisia, the UK, Switzerland, Morocco and Ireland.
  - Italy: decreases on many flows, notably with France, Spain, the UK, Greece, Switzerland, Türkiye and Egypt.
  - Türkiye: decreases on flows with Germany as well as on domestic flows, mainly for Pegasus, SunExpress and Turkish Airlines.
  - Greece: decreases mainly on domestic flows, mostly for the Aegean Group, Sky Express and Vueling.
- Six of the ten busiest States recorded double-digit traffic growth compared to 2019 levels (Poland, Greece, Türkiye, Portugal, Italy and Spain), with the others 3% to 11% below pre-COVID levels.

Busiest 10 aircraft operators

Week 15-21 Sep 2025 (avg daily flights)

No.	Aircraft operator	Average daily flights	% prev week	% prev year	% 2019
1.	Ryanair Group	3,626	+0%	+1%	+40%
2.	easyJet Group	1,832	-1%	-0%	-3%
3.	Turkish Airlines Group	1,716	-0%	+16%	+22%
4.	Lufthansa Airlines	1,250	-0%	-0%	-23%
5.	Air France Group	1,152	-1%	+4%	-10%
6.	Wizz Air Group	997	-0%	+6%	+50%
7.	KLM Group	907	-2%	-1%	-5%
8.	British Airways Group	870	-1%	-1%	-11%
9.	SAS Group	807	+0%	+11%	-15%
10.	Vueling	674	-5%	+2%	-5%

See top 40 airlines

- The busiest 10 aircraft operators, in aggregate, recorded a slightly lower number of flights (-0.7%) compared to the previous week.
- Eight of the ten busiest aircraft operators decreased their capacity compared to Week 37, with the remaining two (Ryanair Group and SAS Group) operating at marginally above their previous week levels.
- Vueling recorded the highest decrease (-5% vs Week 37), mainly on flows between Spain and Italy, Spain (domestic), Portugal, Greece, Croatia and Algeria.
- The KLM Group recorded the second highest decrease (-2% vs Week 37), mainly on flows between the Netherlands and Germany, the UK, the Czech Republic, Poland and Switzerland.
- Compared to 2024, six of the ten busiest airlines/airline groups are flying more (with double-digit increases at Turkish Airlines and SAS groups). The remaining four (KLM, British Airways, Lufthansa and easyJet) all posted slightly lower flight volumes.
- Compared to 2019, three of the busiest 10 carriers/groups operated considerably more flights than in 2019 (Wizz Air +50%, Ryanair +40% and Turkish Airlines +22%) , whereas the remaining seven lie in a range of -3% to -23% fewer flights operated.

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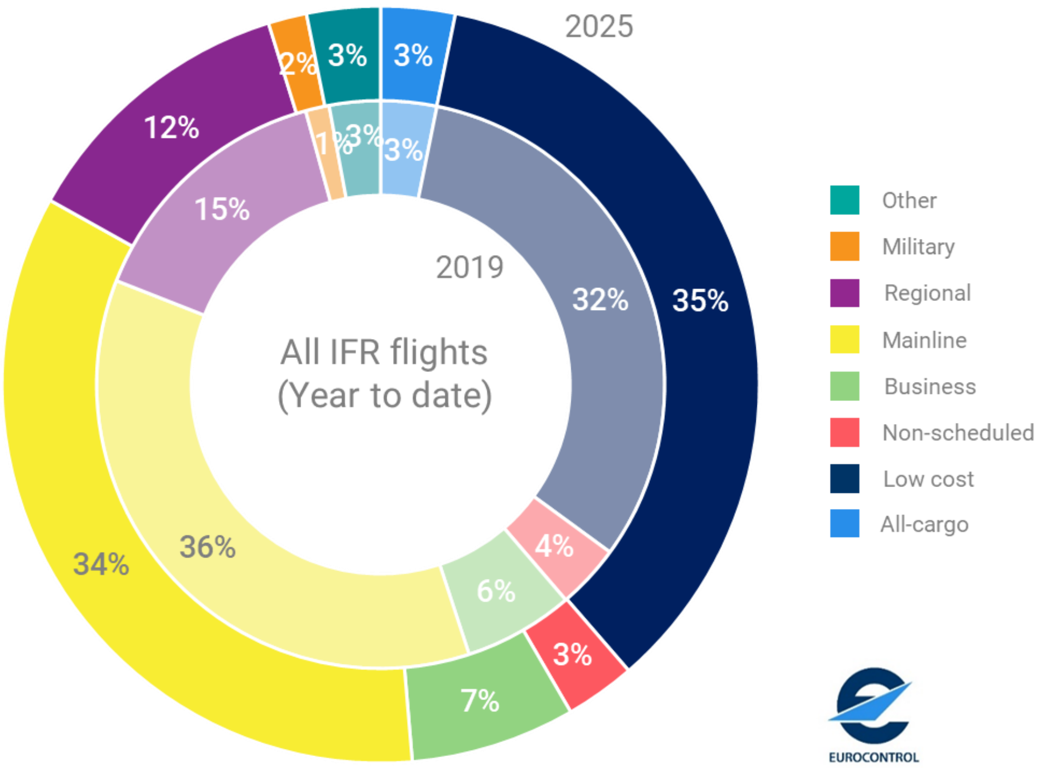
Market segments in the EUROCONTROL network

Average share of total flights (year to date)



No.	Market segment	Avg. flights	% prev week	% prev year	% 2019
1.	Low Cost	12,632	-1%	+7%	+15%
2.	Mainline	11,641	-1%	+2%	-3%
3.	Regional	4,076	-2%	-1%	-15%
4.	Business	2,515	+2%	+5%	+21%
5.	Non-Scheduled	1,248	-2%	-1%	-22%
6.	Other	1,058	+7%	-1%	+1%
7.	All-cargo	1,018	+2%	+1%	+14%
8.	Military	596	+7%	+25%	+33%

- In the year to date, the largest market segment (low cost) is occupying a 35% share, up by 3pp compared to 2019 (same period). The second largest segment (mainline) at 34% has shrunk by 2pp compared to 2019. The regional market share has further shrunk by 3pp to 12%, while the all-cargo market share (3%) has stayed steady.
- Compared to the previous week, a few market segments have recorded positive growth rates: the military (+7%), followed by business and all-cargo (both +2%). The remaining market segments experienced a decrease: mainline and low cost (both -1%), regional and non-scheduled (both -2%).
- Five market segments are recording flights above 2019 levels, notably the military (+33%), business (+21%), low cost (+15%) and all-cargo (+14%). However, the non-scheduled and regional segments recorded double-digit decreases (respectively -22% and -15%).

Busiest 10 airports

Week 15-21 Sep 2025 (avg daily flights)

No.	Airport	Avg. daily dep/arr flights	% prev week	% prev year	% 2019
1.	Istanbul	1,599	+0%	+9%	+28%
2.	Frankfurt	1,407	-0%	+7%	-9%
3.	Amsterdam	1,405	-1%	-3%	-7%
4.	Paris Charles de Gaulle	1,374	-1%	-0%	-8%
5.	London Heathrow	1,335	-1%	-2%	-2%
6.	Madrid Barajas	1,222	-1%	+0%	-1%
7.	Munich	1,062	-1%	+5%	-16%
8.	Barcelona	1,061	-2%	+1%	-0%
9.	Rome Fiumicino	978	-1%	+1%	+5%
10.	Antalya	976	-2%	+5%	+15%

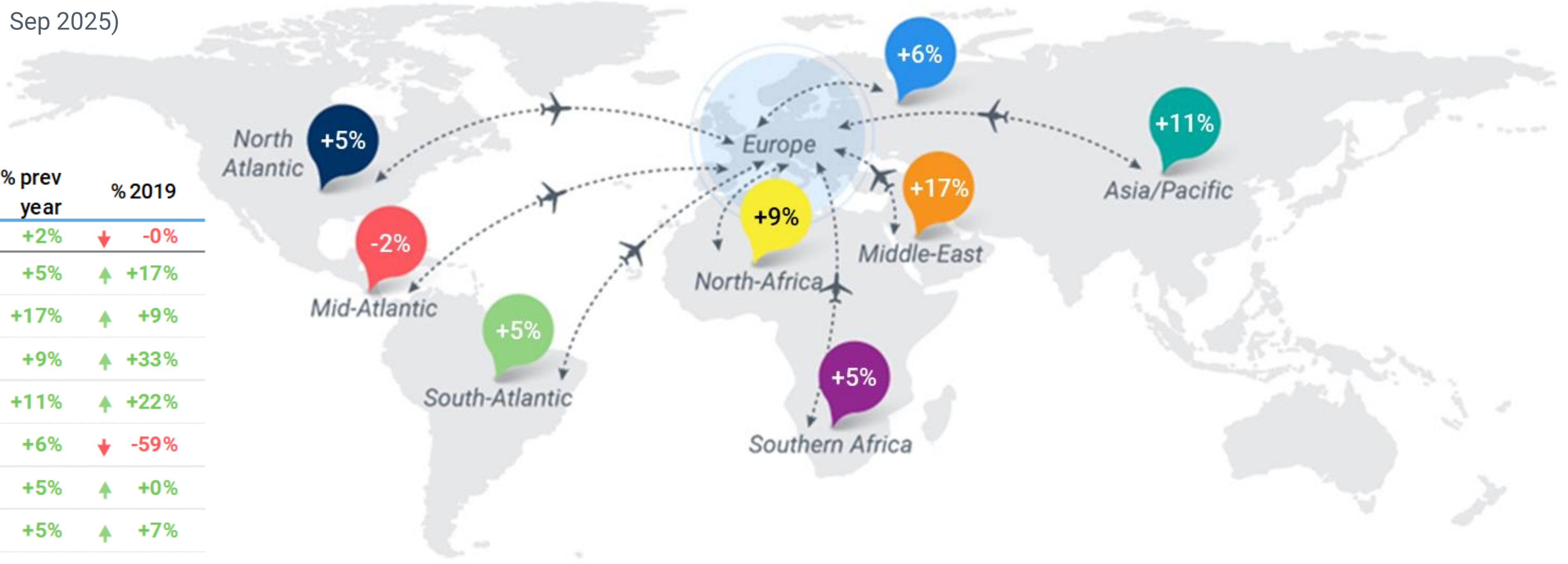
See top 40 airports

- Istanbul (1,599 flights per day; +0% vs Week 37) remained the busiest airport, followed by Frankfurt (1,407 flights; -0%), Amsterdam (1,405, -1%) and Paris CDG (1,374, -1%).
- All of the ten busiest airports saw similar or fewer numbers of flights from one week to the next. One of these – London Heathrow – was impacted due to the cyberattack that started on Friday.
- Barcelona recorded the highest decrease (-2% on the previous week), mainly owing to decreases by easyJet, Vueling and Ryanair, with lower flows to/from Italy, France, Greece and Croatia.
- Antalya recorded the second highest decrease (-2% vs Week 37), mainly owing to fewer flights by Turkish Airlines, Freebird, SunExpress and Air Astana, on primarily flows with Germany, Kazakhstan and Romania.
- Seven out of the ten busiest airports handled a higher number of flights than in 2024, with Istanbul (+9%), Frankfurt (+7%), Munich and Antalya (both +5%) recording the strongest rates. Amsterdam (-3%) and London Heathrow (-2%) posted clear decreases while Paris CDG was slightly below Week 37 levels.
- Three of the busiest ten airports are currently handling more traffic than in 2019: Istanbul (+28%), Antalya (+15%) and Rome Fiumicino (+5%). Munich is still notably below pre-COVID rates at -16%, followed by Frankfurt (-9%), Paris CDG (-8%) and Amsterdam (-7%).

Traffic flows

(average daily departure/arrival flights for week 15-21 Sep 2025)

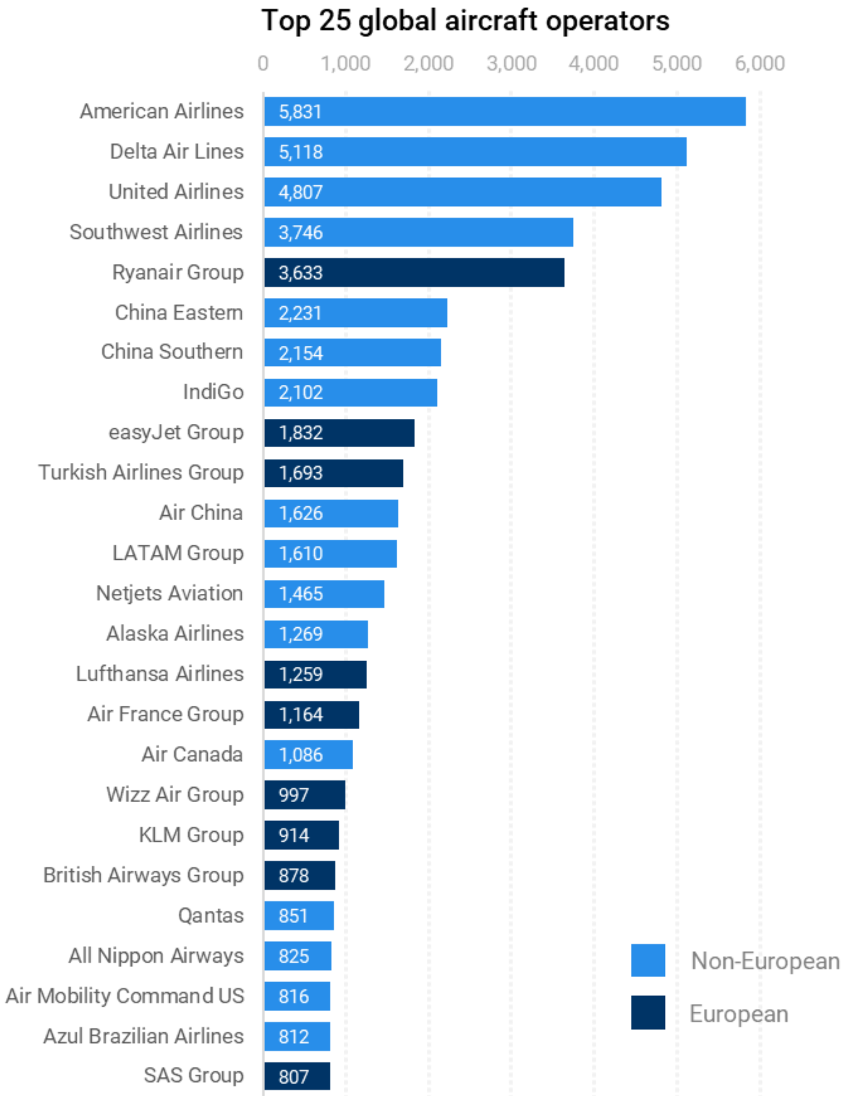
Region	Average daily flights	% prev week	% prev year	% 2019
Intra-Europe	26,964	-0%	+2%	-0%
Europe ↔ North Atlantic	1,660	+0%	+5%	+17%
Europe ↔ Middle-East	1,626	+2%	+17%	+9%
Europe ↔ North-Africa	1,434	-5%	+9%	+33%
Europe ↔ Asia/Pacific	1,016	+0%	+11%	+22%
Europe ↔ Other Europe	514	-2%	+6%	-59%
Europe ↔ Southern Africa	307	-2%	+5%	+0%
Europe ↔ South-Atlantic	209	-3%	+5%	+7%
Europe ↔ Mid-Atlantic	146	-1%	-2%	-3%
Non Intra-Europe	6,911	-1%	+9%	+3%

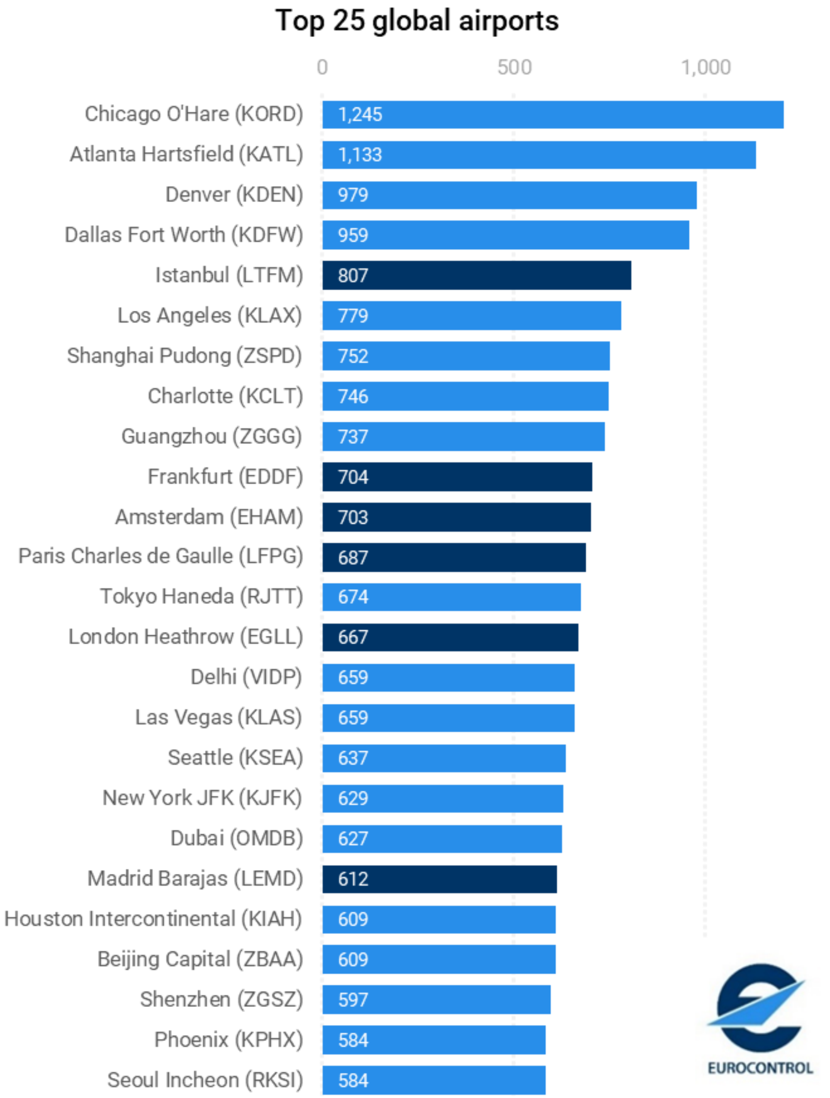


- The main intra-European traffic flow saw 26,964 average daily flights last week, unchanged from Week 37. Intercontinental flows amounted to 6,911 daily flights on average, -1% vs Week 37 levels.
- The second-largest flow (to/from the North Atlantic) saw 1,660 average daily flights (marginally up on the previous week).
- The third-largest flow is with the Middle East, with 1,626 average flights per day (+2% vs Week 37) owing mainly to increased flows Israel ↔ Romania, Greece ↔ Israel, Cyprus ↔ Israel, Israel ↔ Poland, Israel ↔ Moldova and Azerbaijan <-> UAE.
- The fourth-largest flow (to/from North Africa) saw 1,434 daily flights (-5% vs the previous week), mainly due to reduced flows Algeria ↔ France and France ↔ Tunisia.
- The fifth-largest flow (to/from Asia and the Pacific) saw 1,016 daily flights (basically unchanged from Week 37).
- The flow to 'Other Europe' (including the Russian Federation and Belarus) remains massively reduced, -59% lower than 2019.

Busiest 25 global aircraft operators and airports

(average daily departure flights) **(Week 15-21 Sep 2025)**





Source: Flightradar24 Historical Global Utilisation data

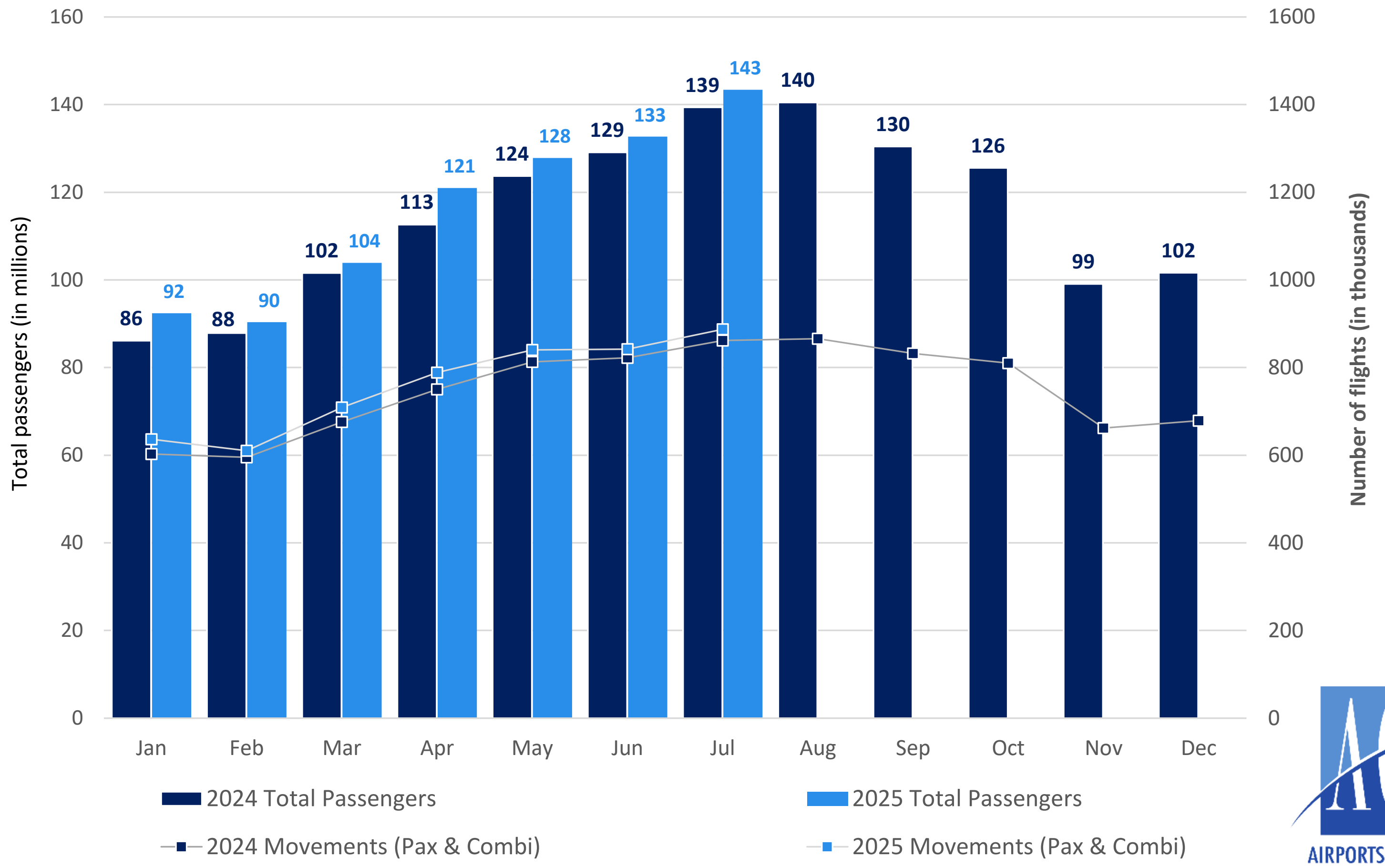
- Over the last week, nine European **airlines/airline groups** were ranked in the top 25 global operators: one more group (SAS) compared to the equivalent week last year.
- Of those, three groups make it into the global top 10: Ryanair (5th), easyJet (9th) and Turkish Airlines (10th).
- Six more European carriers made the top 25, starting with Lufthansa Airlines (15th), Air France Group (16th), Wizz Air Group (18th), KLM Group (19th), British Airways Group (20th) and SAS (25th).

- Over the last week, six European **airports** made the top 25 in terms of global airport departures – a similar situation compared to the equivalent week last year.
- Two airports make the top 10, with Istanbul ranked the highest (5th), followed by Frankfurt (10th).
- The other European airports to make the top 25 are Amsterdam Schiphol (11th), Paris CDG (12th), London Heathrow (14th) and Madrid (20th).
- The top 10 global airports continue to be dominated by US airports: 6/10 are American, 2 European, and 2 Chinese: Shanghai (7th) and Guangzhou (9th).

Busiest 40 European airports in terms of passengers

2025

Passengers and flights at ECAC top 40 Airports



Based on ACI EUROPE **passenger** data, and for the **top 40 European airports**:

- Total **passengers*** amounted to **143M** in July 2025, carried on **887K flights**, both of which are +2.9% vs July 2024. The respective recovery rates compared to 2019 levels were 104% in passenger numbers and 98% in terms of flight movements.
- Over the period January-July 2025, **811M passengers** have been carried on **5.3BN flights**, +4% and 3.8% respectively vs the same period in 2024. Compared to the same period in pre-pandemic 2019, passenger numbers are at 101%, with movements at 97%.

*: Passengers comprise international ones enplaned + deplaned, domestic ones enplaned +deplaned, as well as transit passengers (counted once).

AIRPORTS COUNCIL INTERNATIONAL

Economics

Week 15-21 Sep 2025

19 Sep 2025
avg fuel price:

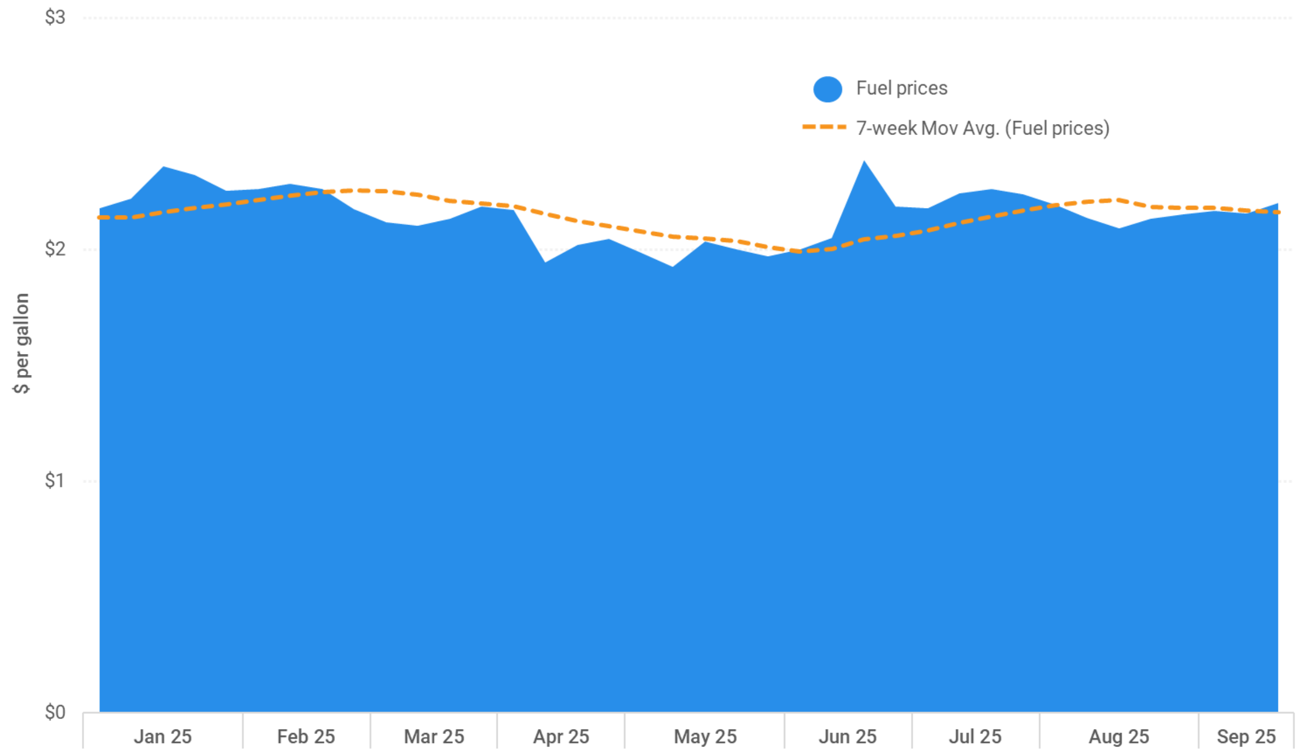
$2.20 /gallon

+2%

vs. $2.17 /gallon
on 05 Sep 2025

Source: IATA/Platts

Jet fuel price (Europe)

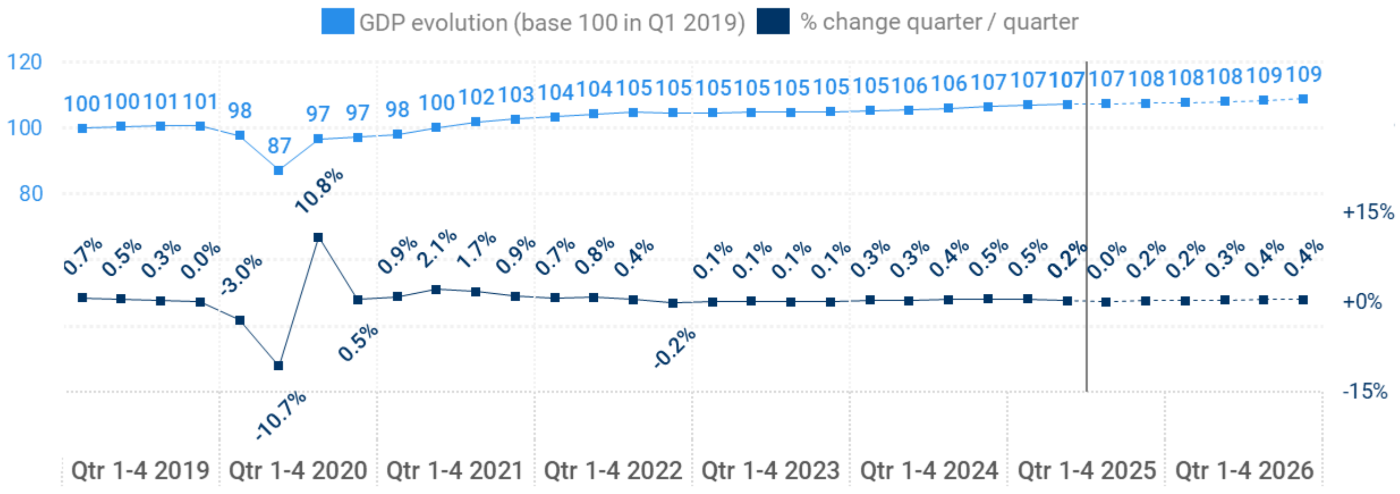


Source: IATA/Platts

- The average jet fuel price closed at 2.20 USD/gallon on 19 September 2025, 2% higher than two weeks ago. For reference, on 20 June 2025 the fuel price had reached 2.39 USD/gallon, the highest since the beginning of the year.
- The eight OPEC+ countries (Saudi Arabia, Russia, Iraq, UAE, Kuwait, Kazakhstan, Algeria and Oman) met on 5 July. In accordance with the decision reached on 5 December 2024 to start a gradual and flexible return to 2.2 million barrels per day, they implemented a production increase of 548K barrels per day in August 2025 over what they were scheduled to produce in July 2025. The gradual increases may be paused or reversed subject to evolving market conditions. This flexibility allows the group to continue to support oil market stability.
- They also confirmed their intention to fully compensate for any overproduced volume since January 2024. The eight OPEC+ countries aim to hold monthly meetings to review market conditions, conformity and compensation. On 3 August they decided to increase their production levels by 547K barrels per day for September.

GDP in the European Union

Constant prices and exchange rate, in euro

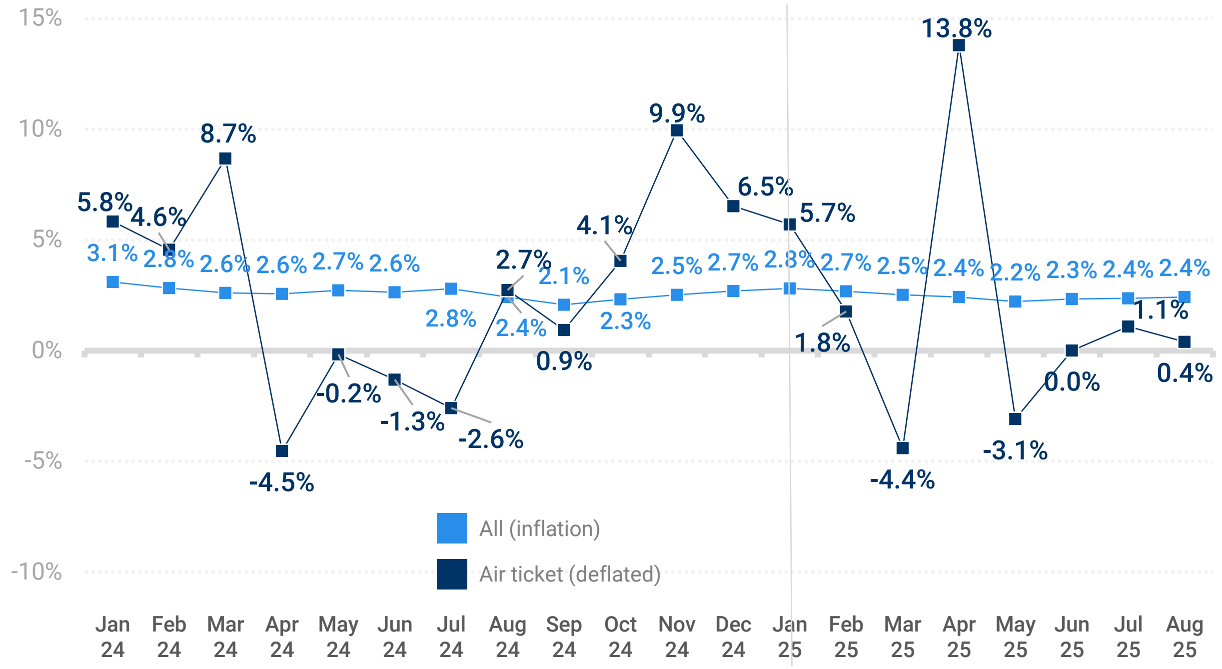


Source: Oxford Economics Ltd.
Last Update: Sep 2025

- According to the **latest GDP data from Oxford Economics (OE)**, the EU27 economies expanded by 0.2% during **Q2 2025** (vs Q1 2025), and are likely to remain stable during Q3 2025 vs Q2 2025.
- For **Q4 2025**, growth is forecasted to slightly increase by **+0.2%** (vs the previous quarter). **Annual GDP growth** for the **EU27** zone is expected to reach **+1.4% in 2025,** and +1.0% in 2026.

Price change per month (EU27)

Values compared to the same month of the previous year



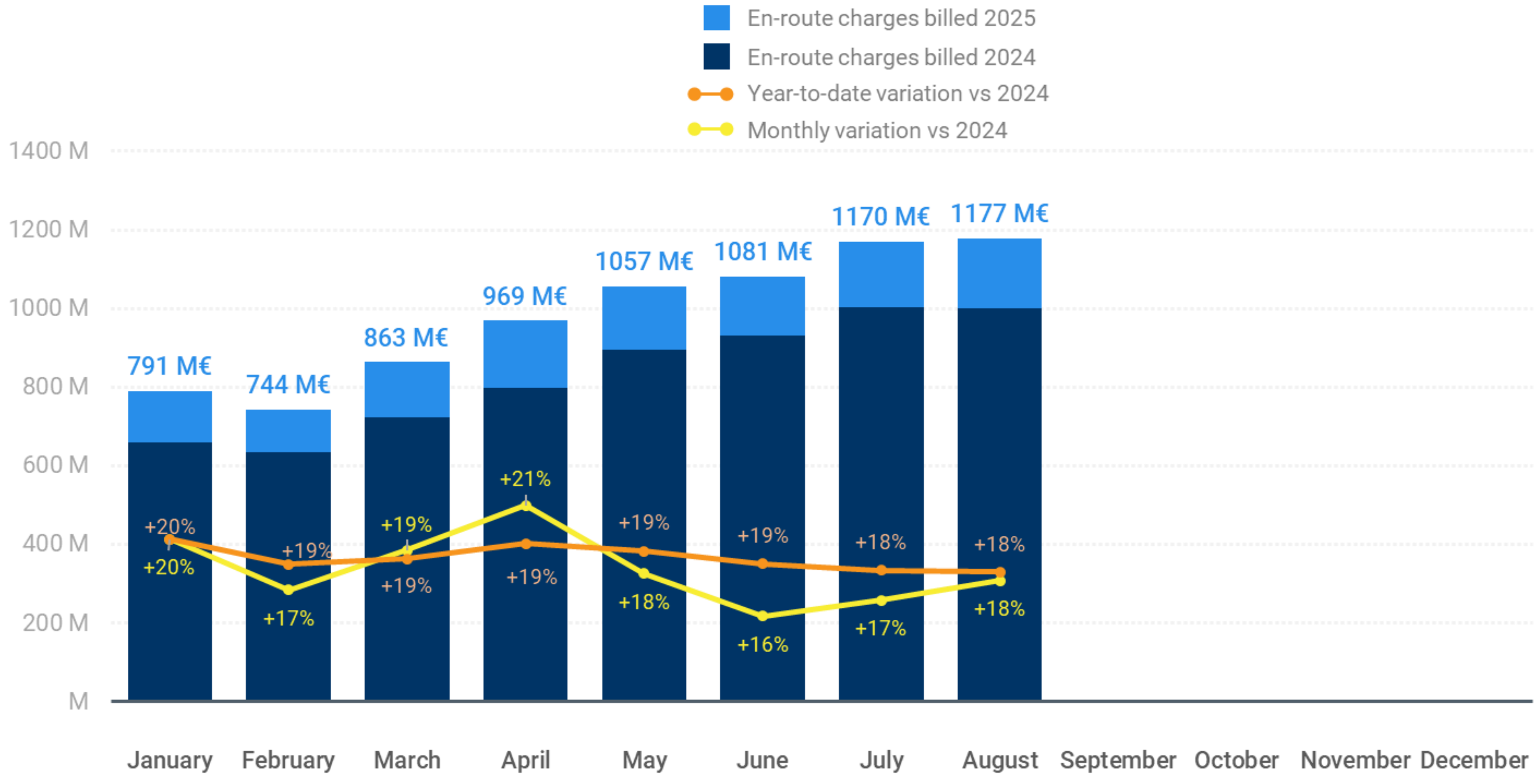
Source: EUROSTAT

The latest information from EUROSTAT for the EU27 shows that:

- **Overall, all-prices** inflation in August 2025 was 2.4% higher than in August 2024.
- **Air ticket prices** were +0.4% in real terms for August 2025 compared to the same month in 2024.
- For the period January to August 2025, air ticket prices increased by 1.7%, while inflation increased by 2.7% vs the same period in 2024.

En-route air navigation charges for the EUROCONTROL area (2025)

Year-to-date amount billed: 7,852 M€ (+18% vs 2024)



- At network level, **1,177M€** en-route air navigation charges were billed in August 2025, +18% vs 2024 and +47% vs 2019.
- These changes were driven by the evolution of Unit Rates and of Service Units (i.e. depending on the distance flown and aircraft weight).
- The **18%** year-on-year increase in charges in August 2025 reflects an 11% increase in Unit Rates and a 6% increase in total en-route Service Units vs August 2024. The average distance per flight has increased by 1%, while the average maximum take-off weight per flight has remained stable.
- On a year-to-date basis, EUROCONTROL has billed **7,852M€** in route charges, also 18% higher than in 2024, and 47% higher than in 2019.

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To further assist you in your analysis, EUROCONTROL provides the following additional information on a daily basis (daily updates at 8:45 CET for the first item) and every Friday for the last item:

1. EUROCONTROL Aviation Intelligence Portal:
   www.eurocontrol.int/Economics/
   This dashboard provides daily performance data on Day+1 for all European States; for the largest airports; for each Area Control Centre (ACC) and the largest airline operators.

2. EUROCONTROL Data App: Available at Android Play and Apple Store.
   This app provides daily performance data on Day+1 at network level and top stakeholders.

Google Play

Apple Store

3. EUROCONTROL "Our Data" Portal:
   www.eurocontrol.int/our-data/
   This webpage provides an overview of key charts and publications related to European aviation performance.

4. Rolling Seasonal Plan:
   www.eurocontrol.int/publication/european-network-operations-plan-2025-rolling-seasonal-plan
   This Rolling Seasonal Plan covers a rolling six or eight-week period. It plays a major role in helping European aviation by providing key actors with the global view they need to plan effectively.

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

www.eurocontrol.int