AVIATION
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EUROCONTROL

EUROPEAN AVIATION OVERVIEW

24-30 Nov 2025

4 December 2025

Headlines

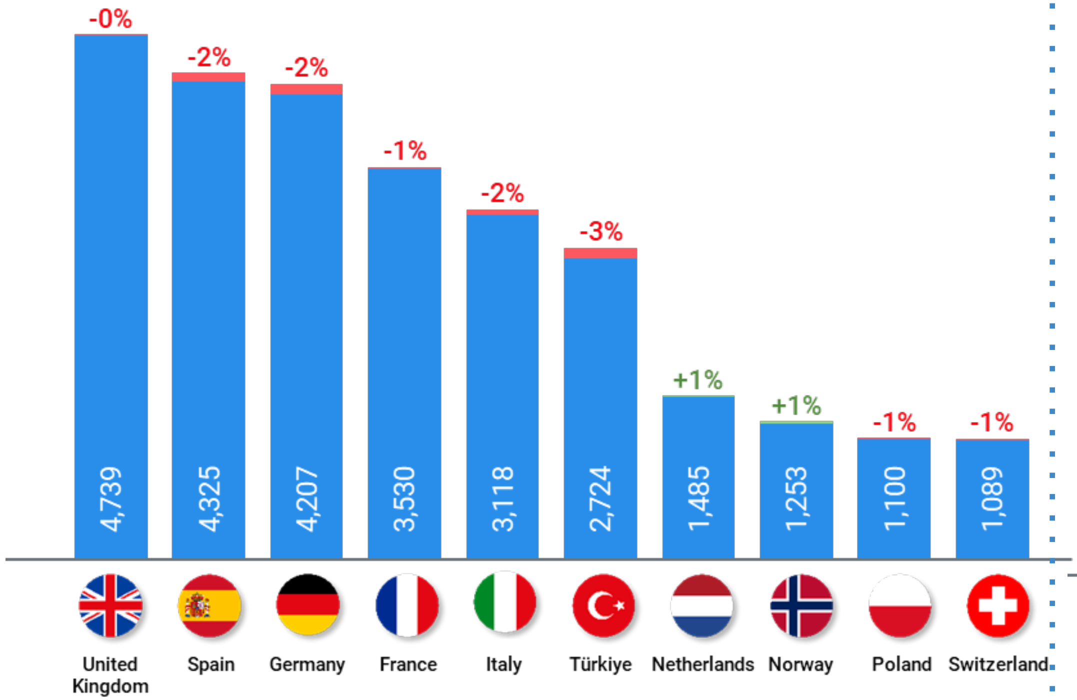
(Week 48, 24-30 Nov 2025)

- The network recorded 26,262 average daily flights in Week 48, -1.2% vs Week 47, +4.0% vs 2024 and -0.1% vs 2019.
- On average, the busiest 10 carriers operated lower capacities (-0.6%) compared to Week 47. Similarly, the busiest 10 States saw their overall flights decrease by 1.2%.
- EASA's Emergency Airworthiness Directive issued on Friday for part of the Airbus A320 fleet was implemented smoothly by all operational partners, and had no visible impact on flights operated or delays.
- Year-to-date traffic is 99.9% of 2019, +4.2% vs 2024.
- Arrival and departure punctuality were 79.6% and 74.7%, slightly worse than the same period last year.
- En-route ATFM delays were -36% compared to the previous week, with a daily average of around 8K delay minutes, 30% lower than 2024. Total ATFM delay per flight was 0.8 min/flight (0.3 for en-route, and 0.5 for airports).
- ATC capacity/staffing was the top delay cause (71% of all en-route ATFM delays), notably in Spain, France and Germany. Other factors (military exercises) were the second largest category (36%), mainly in France.
- The top contributing Area Control Centres to en-route ATFM delays (in mins per flight) were Skopje, Sevilla and Canarias.
- The average jet fuel price closed at 2.18 USD/gallon on 28 November, -8% vs two weeks earlier.

Top 10 busiest States

On week 24-30 Nov 2025

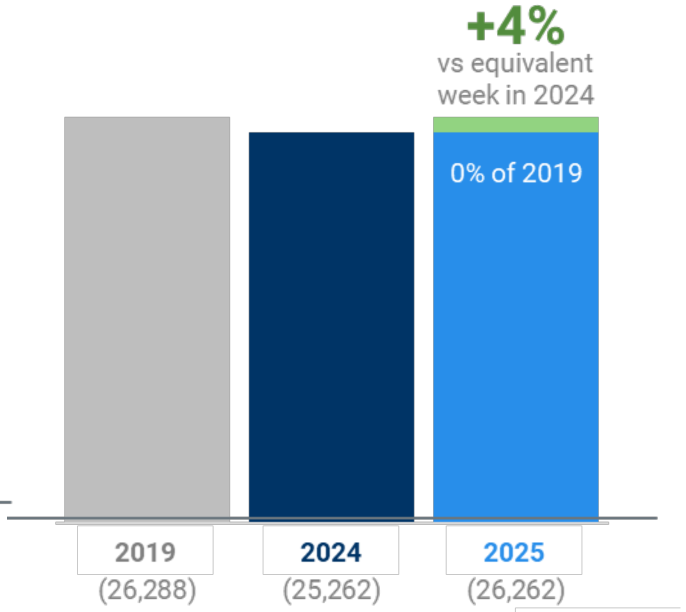
(all flights excl. overflights compared with previous week)



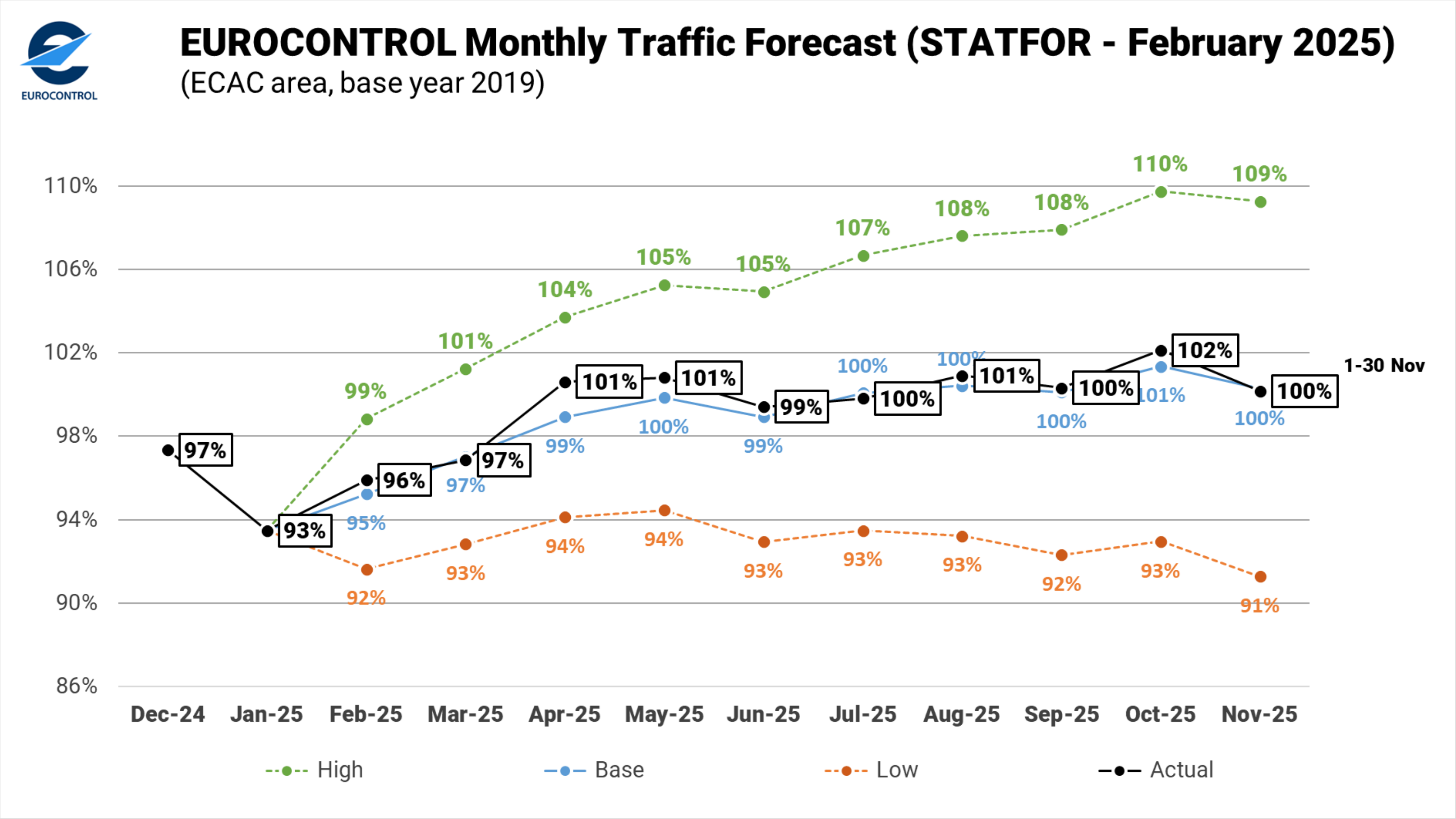
Traffic situation

Average daily flights (including overflights)

Week 24-30 Nov 2025



Overall situation compared to the EUROCONTROL Monthly Traffic Forecast



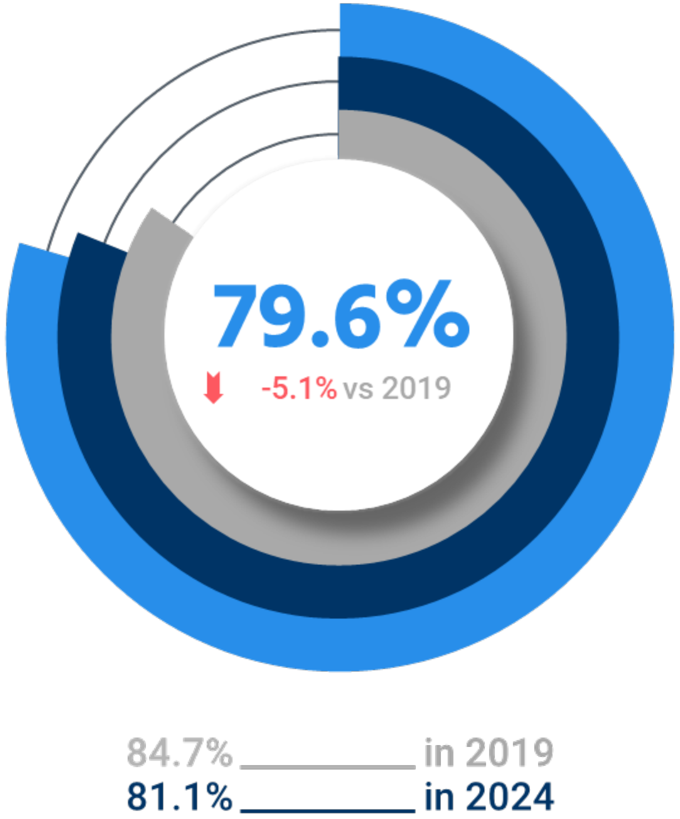
- European traffic (flights) continues to evolve largely in line with the Base scenario at ECAC level of the EUROCONTROL STATFOR flight forecast (2025-2031), which was published on 28 February 2025.
- The number of flights in November 2025 is exactly at the level planned for November in the February 2025 STATFOR forecast.
- On a year-to-date basis, network traffic in the NM area is at 99.9% of 2019, and +4.2% vs 2024 (in average daily flights, to offset the leap year in 2024).

Arrival & departure punctuality

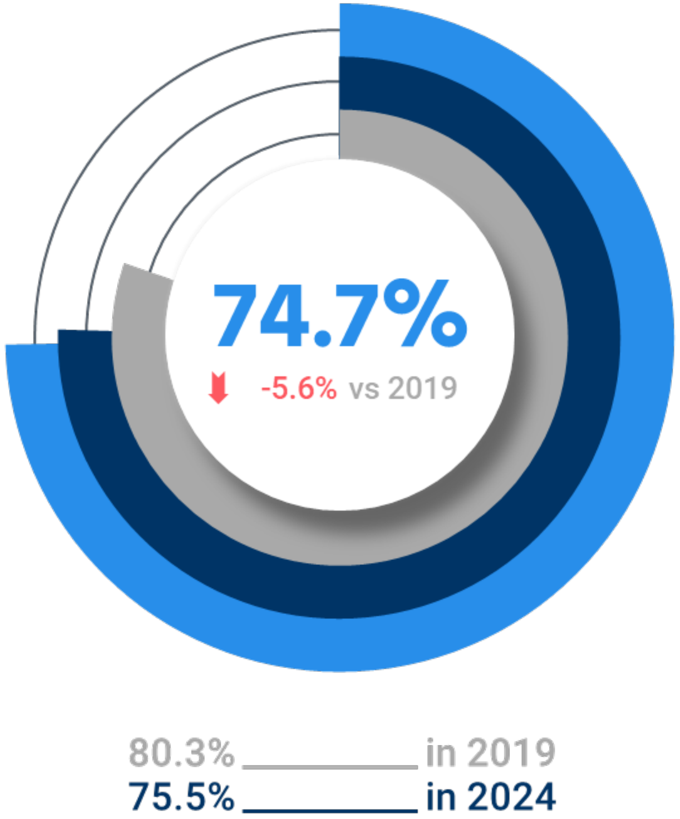
(all network scheduled flights)

Week 48, 24-30 Nov 2025

ARRIVAL PUNCTUALITY



DEPARTURE PUNCTUALITY



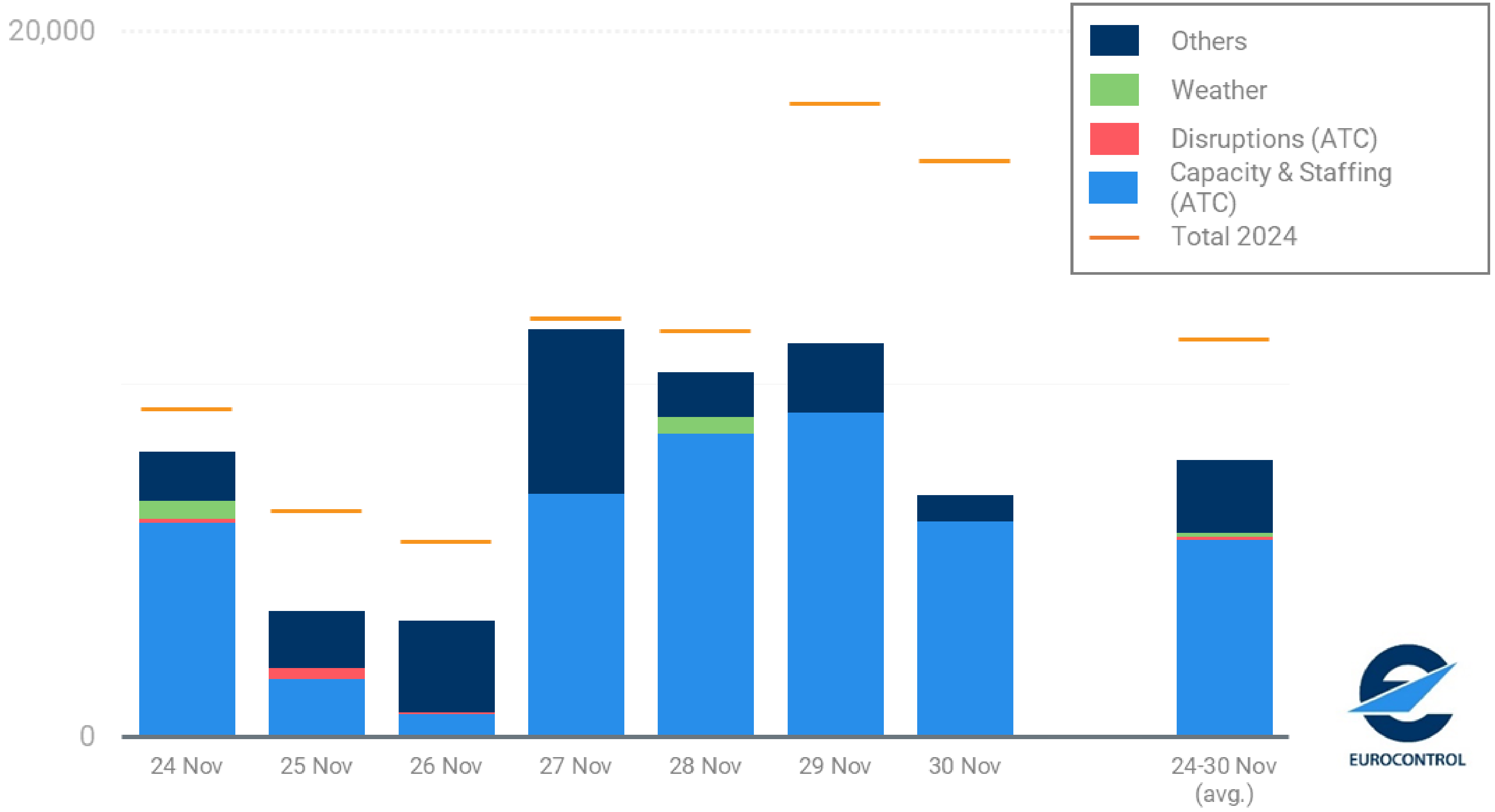
The pictures show the share of flights arriving/departing no later than 15 minutes after/before the scheduled time (OTP15).

- At network level, arrival punctuality (79.6%) was 1.5pp lower than the equivalent week of 2024; departure punctuality (74.7%) was closer to 2024 at just 0.8 pp lower.
- Compared to the same week in 2019, both arrival and departure punctuality were lower by -5.1pp and -5.6pp respectively.
- Athens saw an increase in ATFM delays following single runway operations due to work in progress on RWY 03R/21L, as well as weather (CB/TS) towards the end of the week.
- Amsterdam suffered from weather (low visibility) on 26, 27 and 28 November.
- Paris CDG also experienced weather-related delays (due to Low Visibility Procedures).
- Manchester experienced some regulations on 29 Nov due to taxiway work, as well as higher delays on 30 Nov due to single runway operations.
- Tel Aviv saw daily ATC capacity regulations; however, delays were low.

En-route ATFM delays

Delays per cause (EUROCONTROL area)

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

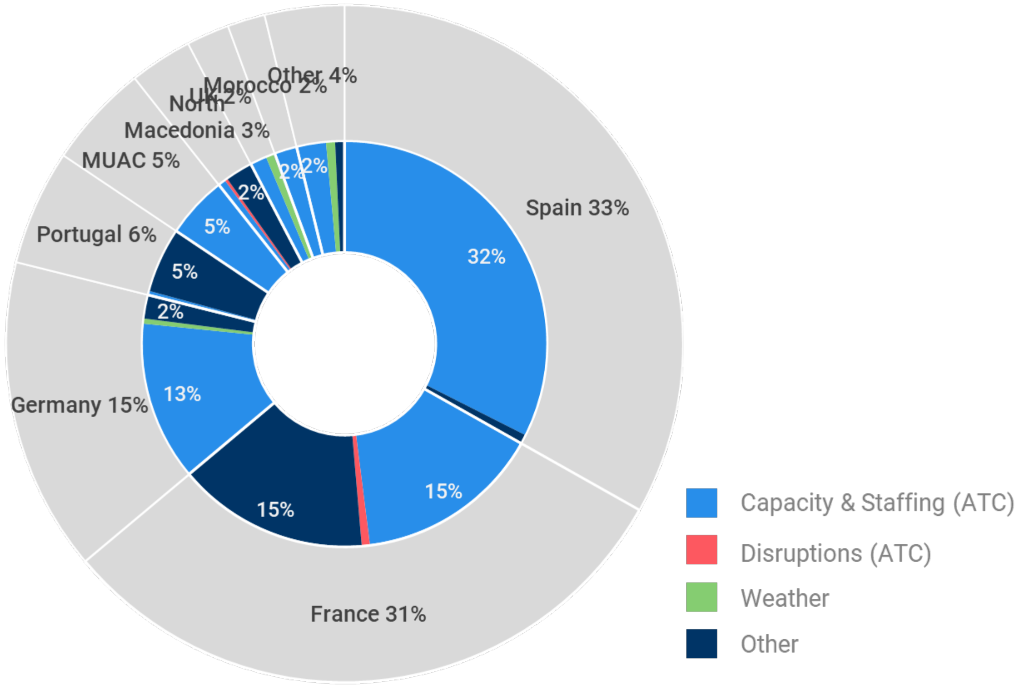


- Week 48 registered lower en-route ATFM delays compared to the previous week (-36%), with an average of 7,850 daily minutes; this is 30% lower than the same operational week in 2024.
- ATC capacity/staffing were responsible for 71% of all en-route ATFM delays (notably in Spain, France and Germany).
- Other factors (military exercises) accounted for 26% of all en-route ATFM delays (mainly in France).
- There were 0.8 minutes of total ATFM delay per flight in Week 48, made up of 0.3 min/flight en-route delay, and 0.5 min/flight airport delay.

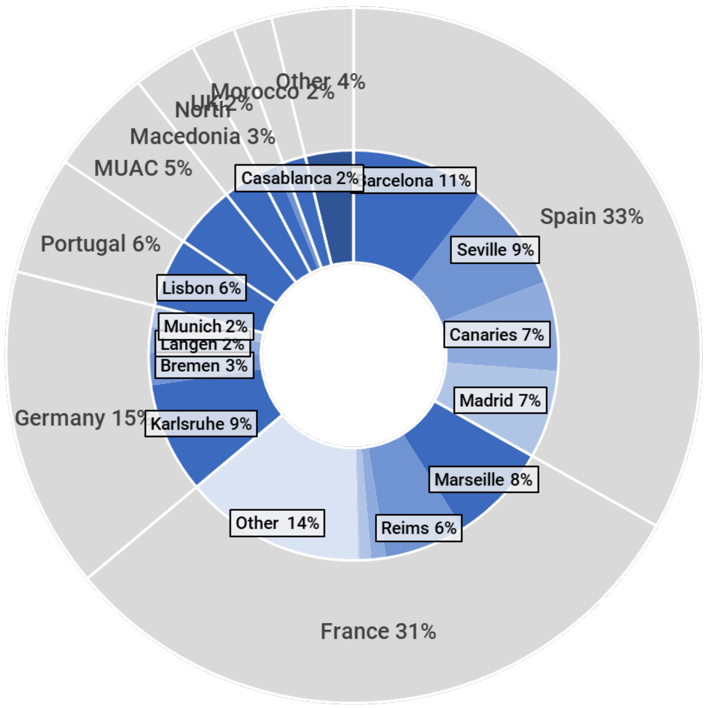
En-route ATFM delays per State, per cause & per ACC

Week 48, 24-30 Nov 2025

En-route ATFM delays per cause for top 8 States

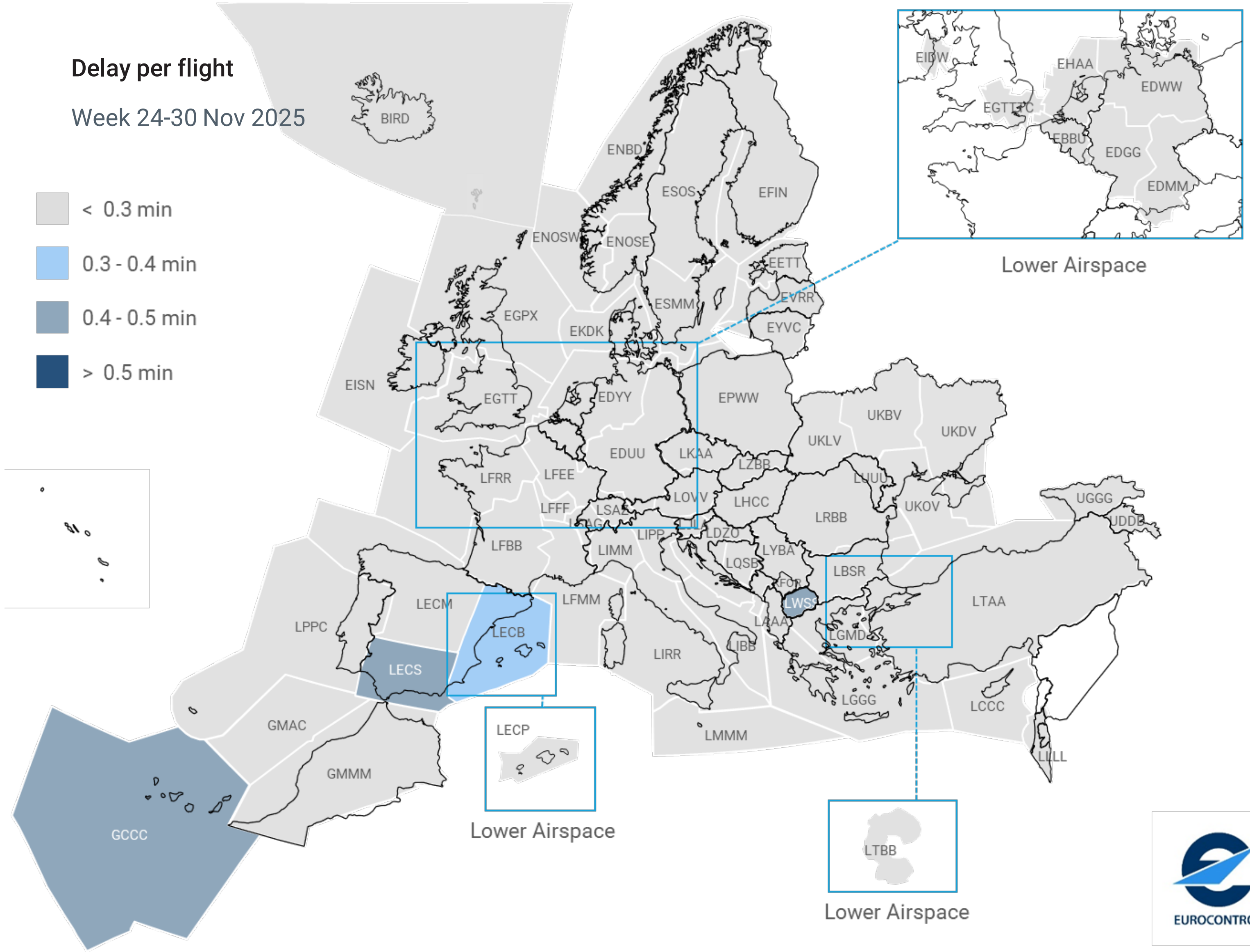


En-route ATFM delays per ACC for top 8 States



- Spain comprised 33% of en-route ATFM delays; these were mainly attributed to Barcelona ACC (11%), Sevilla ACC (11%), Canaries ACC (7%) and Madrid ACC (7%), and were mainly due to Capacity & Staffing (32%).
- France accounted for 31% of en-route ATFM delays; mainly attributed to Marseille ACC (8%) and Reims ACC (6%), and primarily due to Capacity & Staffing (15%) and Other (15%).
- Germany made up 15% of en-route ATFM delays; these were mainly attributed to Karlsruhe UAC (9%) and were driven by Capacity & Staffing (13%).

En-route ATFM delayed flights per Area Control Centre



- In Week 48, three ACCs recorded en-route ATFM delays of around 0.5 min/flight: Skopje ACC (0.48 min/flight), Sevilla ACC (0.48 min/flight) and Canarias ACC (0.45 min/flight).
- The top contributing ACCs in terms of en-route ATFM minutes per flight were as follows:
  - Skopje ACC's upper and lower sectors were regulated due to a new ATM system implementation, and saw delays on Monday-Wednesday and Sunday. The upper sector was regulated due to ATC capacity with delays on Wednesday.
  - Sevilla ACC saw several sectors regulated due to ATC capacity, with delays through the week but notably on Friday-Saturday.
  - Canaries ACC's North-East sector was regulated due to ATC capacity, causing delays mainly on Thursday and Saturday.
  - Barcelona ACC experienced capacity delays on Monday and Thursday-Sunday, with the Levante South sector regulated due to ATC capacity on Sunday.
  - Lisbon ACC saw capacity delays on Sunday.

Busiest 10 States

Departures and arrivals

Week 48, 24-30 Nov 2025

No.	Country	Average daily flights	% prev week	% prev year	% 2019
1.	United Kingdom	4,739	-0%	+2%	-4%
2.	Spain	4,325	-2%	+2%	+18%
3.	Germany	4,207	-2%	-0%	-16%
4.	France	3,530	-1%	+4%	-3%
5.	Italy	3,118	-2%	+5%	+7%
6.	Türkiye	2,724	-3%	+10%	+25%
7.	Netherlands	1,485	+1%	+3%	-1%
8.	Norway	1,253	+1%	+2%	-10%
9.	Poland	1,100	-1%	+3%	+6%
10.	Switzerland	1,089	-1%	+2%	-2%

See all States

- The busiest 10 States, in aggregate, recorded 1.2% fewer flights during Week 48 than in the previous week.
- All but two (Netherlands and Norway) of these States posted decreases in arrivals and departures compared to the previous week.
- The main decreases compared to the previous week were recorded for:
  - Türkiye (-3%): decreases mainly on flows with Saudi Arabia, domestic, Germany and Russia, and mainly for SunExpress, Turkish Airlines, Pegasus, Freebird and Corendon.
  - Spain (-2%): decreases mainly on flows with Germany and the UK, mainly for Eurowings, Vueling, NAYSA, Jet2.com, Norwegian and Canair.
  - Germany (-2%): decreases mainly on domestic flows.
  - Italy (-2%): decreases mainly on flows with the UK, Belgium and Spain,, and mainly for easyJet, Air France, Eurowings and Ryanair.
- Compared to 2024, all but one of these States (Germany) posted increases in arrival and departure flights, with Türkiye leading (+10%).
- Compared to 2019, there are wide traffic differences: four States in the busiest 10 recorded traffic from +6% to as much as +25% (Türkiye), while six recorded levels between -1% and -16% (Germany).

Busiest 10 aircraft operators

Week 48, 24-30 Nov 2025 (average daily flights)

No.	Aircraft operator	Average daily flights	% prev week	% prev year	% 2019
1.	Ryanair Group	2,560	-0%	+5%	+30%
2.	Turkish Airlines Group	1,486	-1%	+12%	+22%
3.	easyJet Group	1,218	+0%	+9%	-3%
4.	Lufthansa Airlines	1,052	-0%	-4%	-26%
5.	Air France Group	927	-3%	+8%	-14%
6.	Wizz Air Group	843	+0%	+8%	+57%
7.	KLM Group	814	-0%	+5%	+10%
8.	British Airways Group	804	-1%	+1%	-4%
9.	SAS Group	731	+1%	+29%	-10%
10.	Pegasus	569	-2%	+16%	+28%

See top 40 airlines

- The busiest 10 aircraft operators, in aggregate, recorded 0.6% fewer flights compared to the previous week.
- All of the 10 busiest aircraft operators decreased their capacity compared to the previous week except easyJet (+0%), Wizz Air (+0%) and SAS (+1%).
- The main decreases compared to the previous week were recorded for:
  - Air France (-3%): decreases mainly on the flows France ↔ US, France ↔ Italy and France ↔ Spain.
  - Turkish Airlines (-1%): decreases mainly on the flows Saudi Arabia ↔ Türkiye and Türkiye internal.
  - British Airways (-1%): decreases mainly on flows UK ↔ US, Italy ↔ UK and UK internal.
- Compared to 2024, all but one of the busiest ten aircraft operators (Lufthansa) recorded more flights, notably SAS (+29%), Pegasus (+16%), Turkish Airlines (+12%), easyJet (+9%), Air France (+8%) and Wizz Air (+8%).
- Compared to 2019, five of the busiest 10 aircraft operators (Wizz Air, Ryanair, Pegasus, Turkish Airlines and KLM) operated more flights than in 2019 – and, for the first four, significantly more (+57%, +30%, +28% 22% and +10% respectively).

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Europe’s 6 largest airline groups

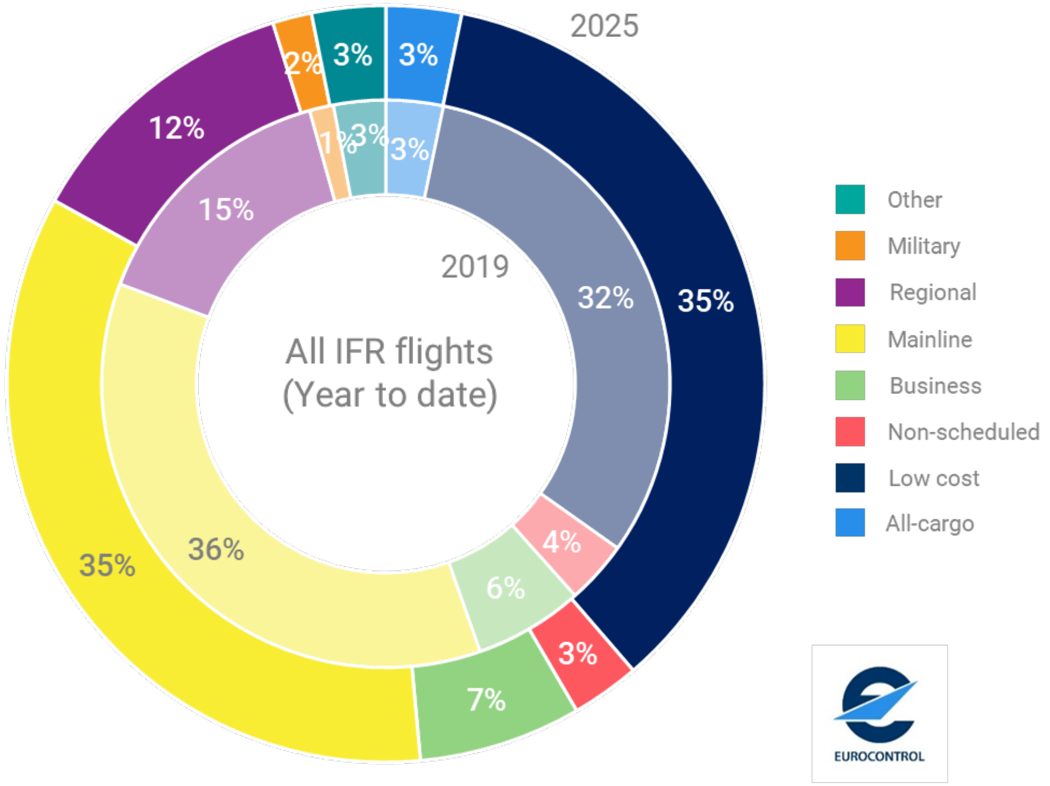
Week 48, 24-30 Nov 2025 (average daily flights)

No.	Aircraft operator	Average daily flights	% prev week	% prev year	% 2019
1.	Ryanair Group	2,560	-0%	+5%	+30%
2.	Lufthansa Group	2,350	-2%	-1%	-21%
3.	IAG Group	2,106	-1%	-1%	+2%
4.	Air France-KLM Group	1,741	-2%	+7%	-4%
5.	Turkish Airlines Group	1,486	-1%	+12%	+22%
6.	easyJet Group	1,218	+0%	+9%	-3%

- The 6 largest European airline groups – i.e. aggregating the constituent members of the Lufthansa, IAG and Air France-KLM groups to join the Ryanair, easyJet and Turkish Airlines groups from the previous slide – in aggregate recorded a lower number of flights (-1.1%) compared to the previous week.
- All six except the easyJet Group decreased capacity compared to the previous week, ranging from -0% for the Ryanair Group to -2% for both the Lufthansa Group and Air France-KLM Group.
- Compared to 2024, all but two airline groups recorded more flights, with Turkish Airlines Group posting a double-digit increase (+12%), followed by easyJet Group (+9%) and Air France-KLM Group (+7%).
- Compared to 2019, three groups (Lufthansa, Air France-KLM and easyJet) operated fewer flights than in 2019 (-21%, -4% and -3% respectively). Two groups operated significantly more flights (Ryanair +30% and Turkish Airlines +22%), while IAG Group recorded +2%.

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.	Mainline	9,692	-1%	+6%	-1%
2.	Low Cost	8,435	-1%	+5%	+17%
3.	Regional	3,480	+0%	+1%	-14%
4.	Business	1,678	-7%	+1%	+20%
5.	All-cargo	1,099	+2%	-0%	+21%
6.	Other	883	+6%	-2%	+3%
7.	Military	503	-3%	+7%	-5%
8.	Non-Scheduled	498	-2%	-0%	-11%

- Year-to-date, the largest market segments (Mainline and Low-cost) both have a 35% share, with Mainline down by 1pp compared to the same period in 2019, whereas Low-cost is up by 3pp compared to 2019. The Regional market share has shrunk by 3pp to 12%, while All-cargo (3%) is stable.
- Over the previous week, five market segments recorded negative growth rates, notably Business (-7%), Military (-3%) and Non-scheduled (-2%). The All-cargo segment recorded positive growth (+2%).
- All-cargo (+21%), Business (+20%) and Low-cost (+17%) are recording flights above 2019 levels; however, Mainline is slightly down at -1%, while Regional and Charter have recorded double-digit decreases of -14% and -11% respectively.

Busiest 10 airports

Week 48, 24-30 Nov 2025 (average daily flights)

No.	Airport	Avg. daily dep/arr flights	% prev week	% prev year	% 2019
1.	Istanbul	1,459	-1%	+11%	+31%
2.	London Heathrow	1,288	-1%	+1%	+3%
3.	Amsterdam	1,259	-0%	+2%	-1%
4.	Paris Charles de Gaulle	1,221	-1%	+5%	-3%
5.	Frankfurt	1,193	-1%	+4%	-8%
6.	Madrid Barajas	1,163	-1%	+1%	+3%
7.	Barcelona	859	-2%	-1%	+6%
8.	Munich	815	-1%	-2%	-23%
9.	Istanbul Sabiha Gokcen	738	-1%	+13%	+24%
10.	Rome Fiumicino	737	-1%	-2%	+2%

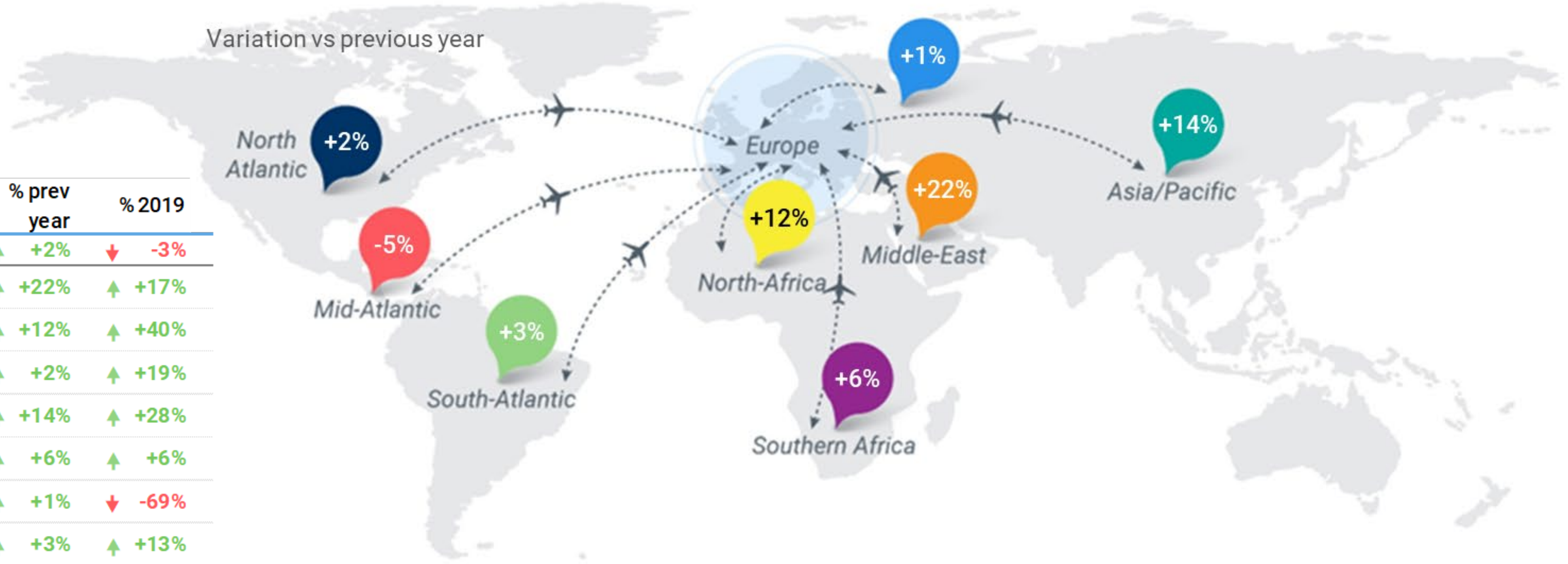
See top 40 airports

- The busiest 10 airports, in aggregate, recorded 0.9% fewer flights compared to the previous week.
- All ten decreased in capacity compared to the previous week.
- The main decreases compared to the previous week were recorded for:
  - Barcelona (-2%): decreases mainly on one flow (Italy ↔ Spain), and mainly for Vueling.
  - Istanbul (-1%): decreases mainly on the flows Türkiye ↔ Türkiye and Saudi Arabia ↔ Türkiye, and mainly for Turkish Airlines.
  - London Heathrow (-1%): decreases mainly on the flow UK ↔ US, and mainly for American Airlines and British Airways.
- Compared to 2024, all but three of these airports (Barcelona, Munich and Rome) recorded more flights, notably Istanbul Sabiha Gökçen (+13%), Istanbul (+11%), Paris CDG (+5%) and Frankfurt (+4%).
- Compared to 2019, six of the busiest 10 airports (Istanbul, Istanbul Sabiha Gökçen, Barcelona, London Heathrow, Madrid and Rome Fiumicino,) operated more flights than in 2019 – and, for the first two, significantly more (+31% and +24% respectively).

Traffic flows

(average daily departure/arrival flights for Week 48, 24-30 Nov 2025)

Region	Average daily flights	% prev week	% prev year	% 2019
Intra-Europe	19,520	-1%	+2%	-3%
Europe ↔ Middle-East	1,528	-2%	+22%	+17%
Europe ↔ North-Africa	1,277	-1%	+12%	+40%
Europe ↔ North Atlantic	1,048	-7%	+2%	+19%
Europe ↔ Asia/Pacific	1,012	+0%	+14%	+28%
Europe ↔ Southern Africa	349	-0%	+6%	+6%
Europe ↔ Other Europe	243	-5%	+1%	-69%
Europe ↔ South-Atlantic	204	-4%	+3%	+13%
Europe ↔ Mid-Atlantic	177	+2%	-5%	+3%
Non Intra-Europe	5,839	-2%	+11%	+9%



- Intra-European traffic saw 19,520 daily flights on average last week, -1% vs the previous week. Intercontinental flows amounted to 5,839 daily flights on average, -2% vs the previous week.
- The top intercontinental flows were between Europe and the Middle East, followed by to/from North Africa, North America and Asia/Pacific.
- The highest decrease compared to the previous week was recorded for North America (-7%), largely driven by lower traffic on the busy UK ↔ US flow.
- All intercontinental flows except with the Mid Atlantic (Central America and the Caribbean) recorded more traffic than in 2024, and all but one (Other Europe) recorded more flights than in 2019.

Top 10 long-haul country pairs

(average daily departure/arrival flights for the last week)

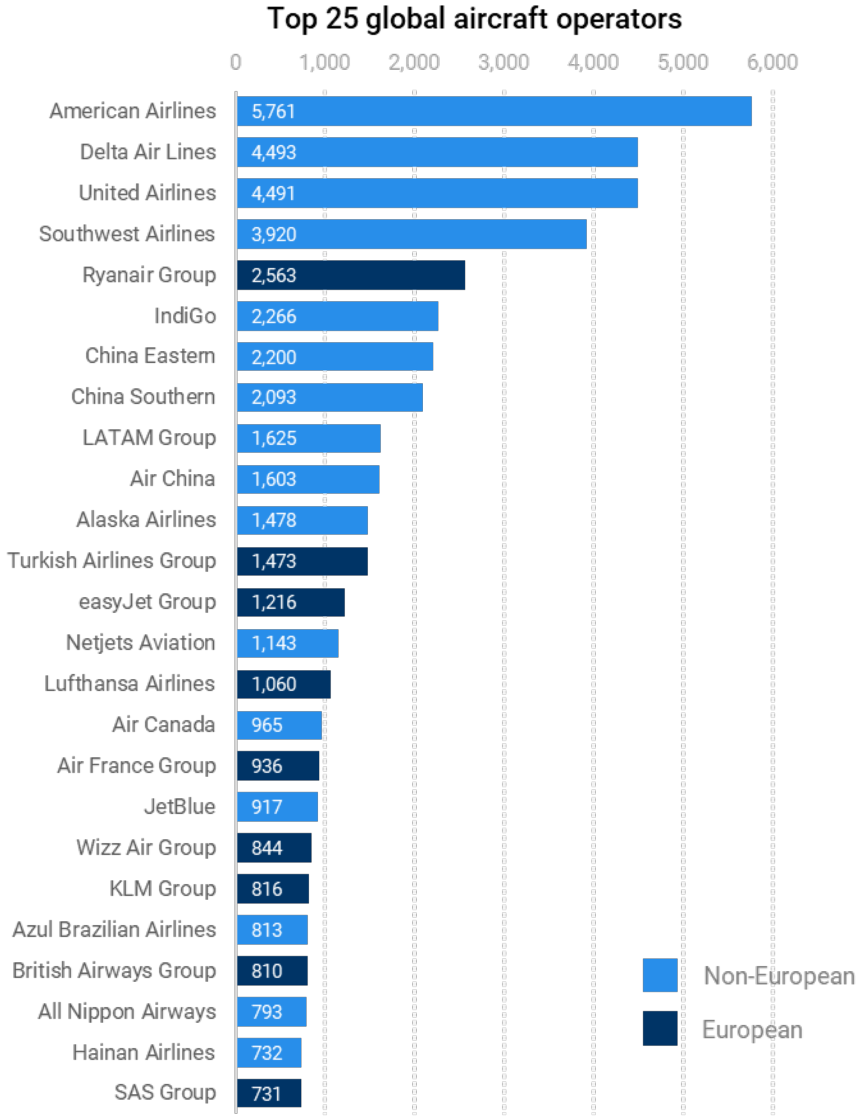
Week 48, 24-30 Nov 2025 (average daily flights)

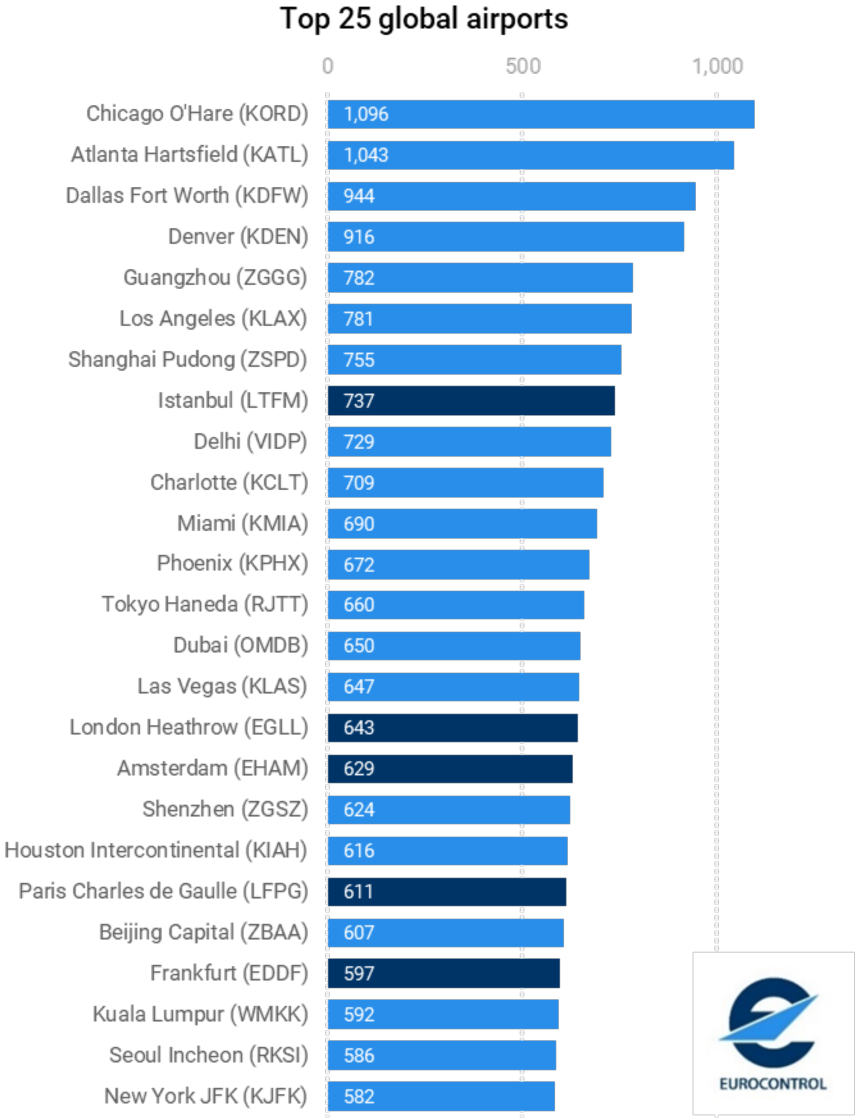
No.	Country pair	Average daily flights	% prev week	% prev year	% 2019
1.	UK ↔ US	242	-7%	-3%	+4%
2.	Germany ↔ US	132	-4%	-4%	+4%
3.	France ↔ US	91	-9%	+3%	+6%
4.	UAE ↔ UK	72	+0%	+13%	+6%
5.	Netherlands ↔ US	66	-1%	+5%	+17%
6.	Ireland ↔ US	58	-11%	+32%	+32%
7.	Egypt ↔ Russia	57	-4%	+43%	
8.	Spain ↔ US	56	-12%	+9%	+25%
9.	Germany ↔ UAE	55	-2%	+18%	+29%
10.	Italy ↔ US	54	-4%	+21%	

- Seven of the top 10 long-haul country pairs are with the US, the main three being between the US and the UK, Germany and France.
- The only non-US-related long-haul flows within the top 10 are between UAE ↔ UK, Egypt ↔ Russia (i.e. overflying the network) and Germany ↔ UAE.
- Compared to the previous week, most long-haul flows posted decreases, notably Spain ↔ US (-12%), Ireland ↔ US (-11%), France ↔ US (-9%) and UK ↔ US (-7%). One flow posted a slight increase UAE ↔ UK (+0%).
- Compared to 2024, all but two of the top long-haul flows recorded a positive growth rate vs 2024, most notably Egypt ↔ Russia (+43%), Ireland ↔ US (+32%), Italy ↔ US (+21%), Germany ↔ UAE (+18%) and UAE ↔ UK (+13%). However, the top two flows were both down, -3% UK ↔ US and -4% Germany ↔ US.
- All of the top 10 long-haul flows are currently above 2019 levels, notably Ireland ↔ US (+32%), Germany ↔ UAE (+29%), Spain ↔ US (+25%) and Netherlands ↔ US(+17%).

Top 25 global aircraft operators and airport departures

(average daily departure flights) **(Week 48, 24-30 Nov 2025)**





Source: Flightradar24 Historical Global Utilisation data

- Aircraft operators: Over the last week, nine European aircraft operators were ranked in the top 25 global aircraft operators.
- Of those, one group makes it into the global top 10: Ryanair (5th).
- Eight more European carriers made the top 25, starting with Turkish Airlines (12th), easyJet (13th), Lufthansa Airlines (15th), Air France Group (17th), Wizz Air Group (19th), KLM (20th), British Airways Group (22nd) and SAS (25th).
- Airports: Over the last week, five European airports made the top 25 in terms of global airport departures.
- Istanbul was the only European airport to make the top 10 in place 8, followed by London Heathrow (16th), Amsterdam (17th), Paris CDG (20th) and Frankfurt (22nd).
- The top 10 global airports continued to be dominated by the US with 6/10 being American. China is a distant second with 2 airports, while India joins Europe on 1.

Jet fuel price (Europe)

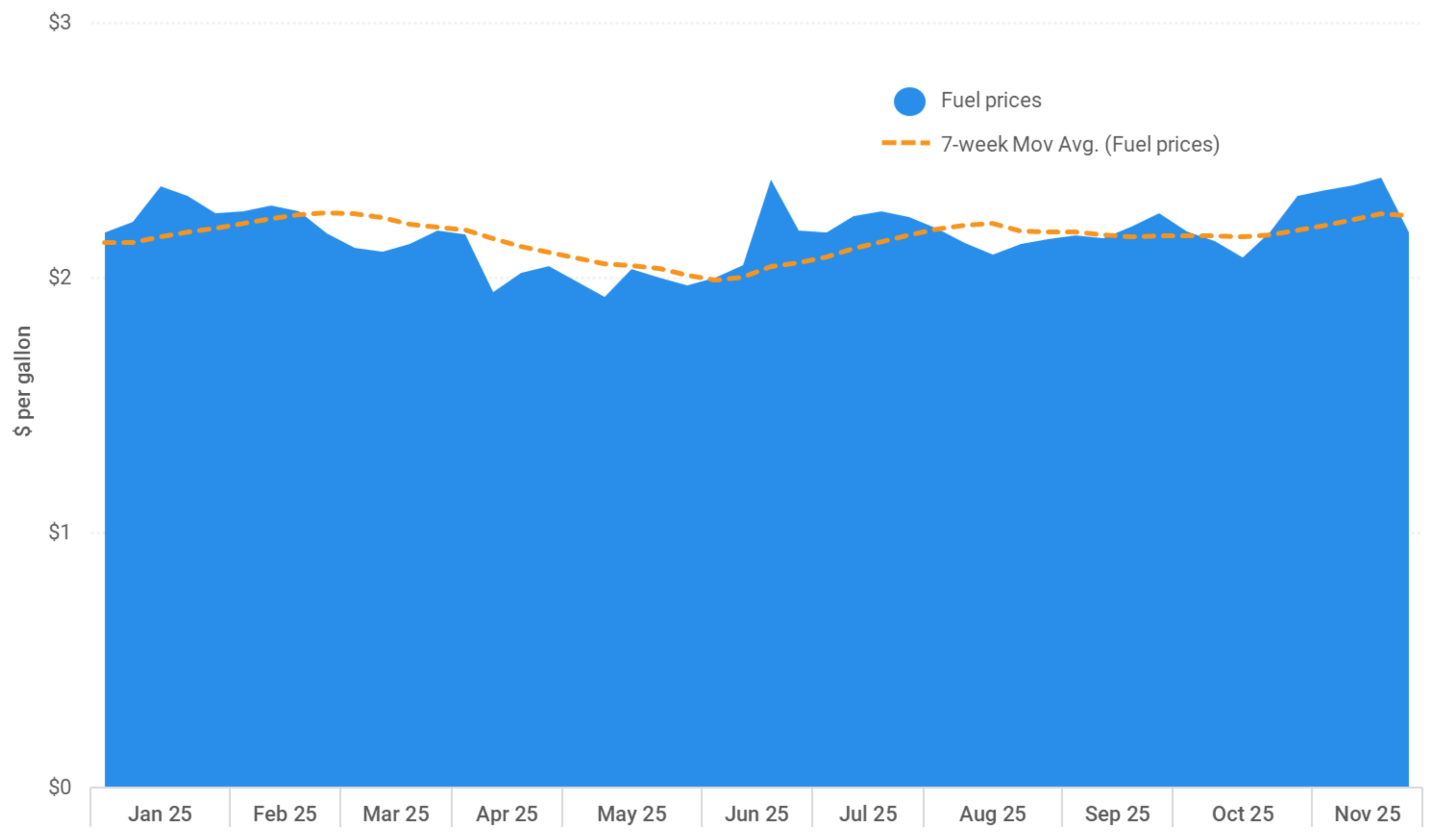
28 Nov 2025
avg fuel price:

$2.18 /gallon

-8%

vs. $2.36 /gallon
on 14 Nov 2025

Source: IATA/Platts

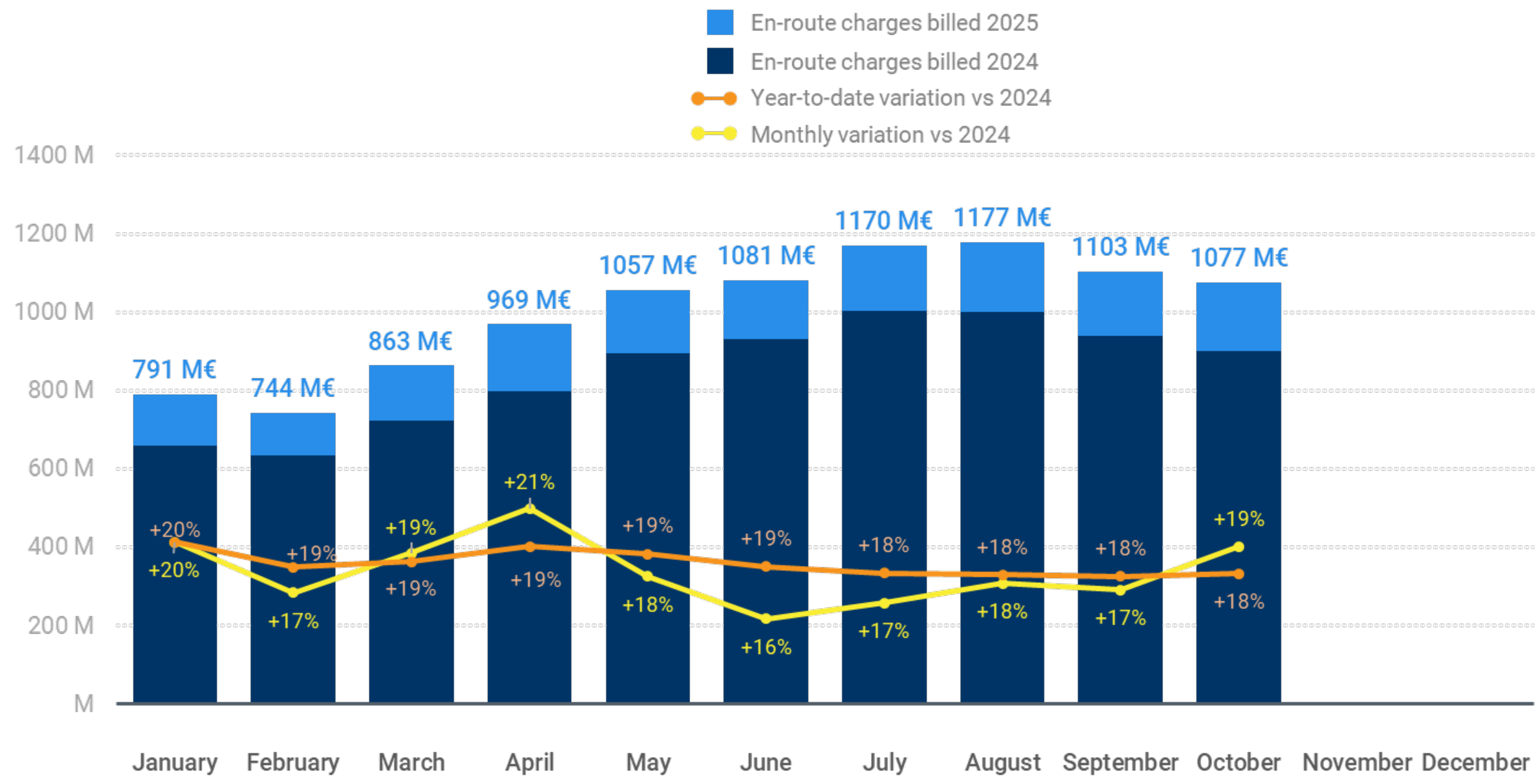


Source: IATA/Platts

- The average price of jet fuel closed at 2.18 USD/gallon on 28 November 2025, 8% lower than two weeks ago. The highest price since the beginning of the year remains that of 20 June 2025, when the fuel price reached 2.39 USD/gallon.
- Context: the eight OPEC+ countries (Saudi Arabia, Russia, Iraq, UAE, Kuwait, Kazakhstan, Algeria and Oman) met on 5 July 2025. 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 will allow the group to continue to support oil market stability.
- They also confirmed their commitment to fully compensate for any overproduced volumes since January 2024. The eight OPEC+ countries continue to hold monthly meetings to monitor market conditions, conformity, and compensation. At the most recent meeting on 30 November, they confirmed a final production increase of 137K barrels per day for December 2025 and decided to pause any further output hikes for January–March 2026. They noted that voluntary cuts of 1.65 million barrels per day could be gradually restored later if market conditions improve. The next review meeting is scheduled for 4 January 2026.

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

Year-to-date amount billed: 10,032 M€ (+18% vs 2024)



- At network level, 1,077 M€ in en-route air navigation charges was billed in October 2025, +19% vs 2024 and +54% 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 October 2025 reflects a 11% increase in Unit Rates and a 5% increase in total en-route Service Units vs September 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 10,032 M€ in route charges, 19% higher than in 2024 and 54% 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

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