AVIATION
INTELLIGENCE+

EUROCONTROL

EUROPEAN AVIATION OVERVIEW

05-11 May 2025

Thursday 15 May 2025

Headlines

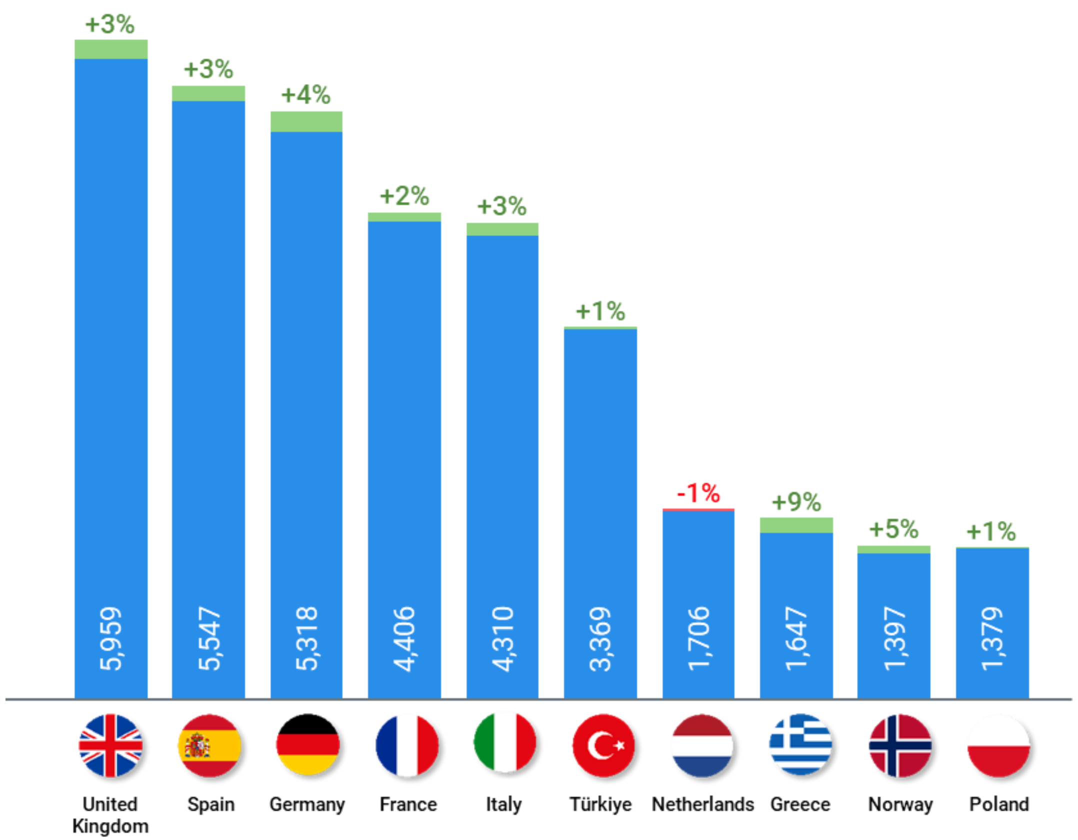
(Week 05-11 May 2025)

- The network recorded 31,726 average daily flights in week 19 (+3.5% vs 2024, rounded to 4% on the right-hand-side graph), above 2019 levels (101%).
- Overall, traffic in Week 19 was +2.5% vs Week 18.
- On average, the top 10 carriers slightly increased their capacities by 1.1% compared to the previous week. Meanwhile, at country level, the top 10 States saw their flights increase by 2.7%.
- Year-to-date traffic is 98% of 2019, 5% more than 2024.
- Arrival and departure punctuality were 79.7% and 74.6% respectively, better than the equivalent week last year and in 2019.
- En-route ATFM delays were -36% compared to the previous week, with a daily average of just below 35,500 minutes – and -14% vs the same week in 2024. In Week 19 this translated into an average of 1.1 min/flight.
- ATC capacity/staffing was the top delay cause last week (62% of all en-route ATFM delays), followed by Weather (26%).
- The average jet fuel price stood at 1.93 USD/gallon on 09 May, a 6% drop on two weeks earlier.

Top 10 busiest States

On week 05-11 May 2025

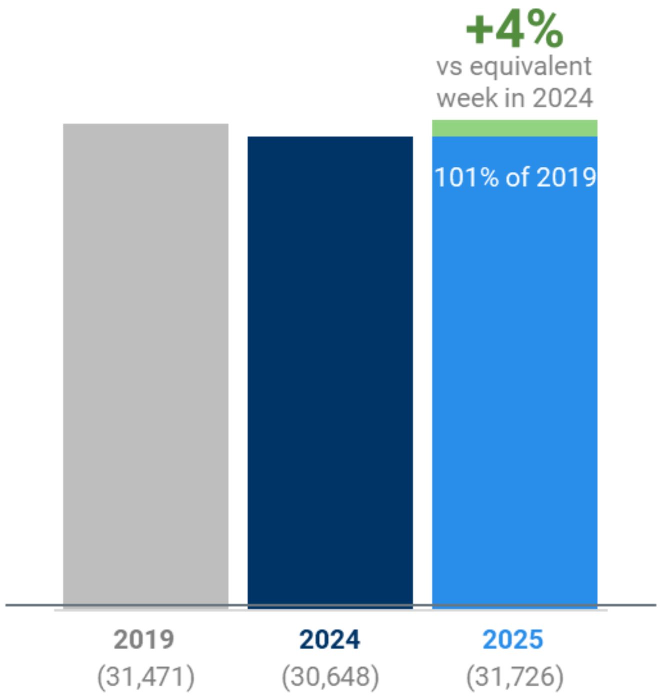
(all flights excl. overflights compared with previous week)



Traffic situation

Average daily flights (including overflights)

Week 05-11 May 2025

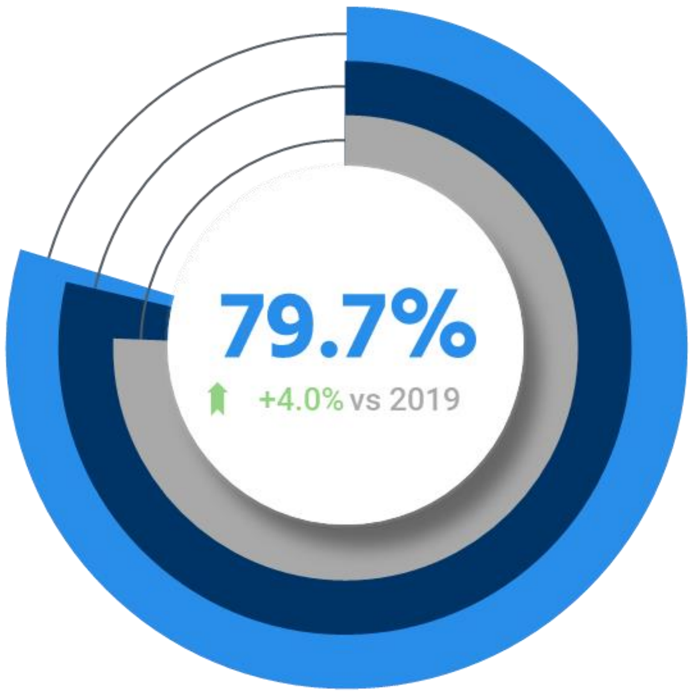


Arrival & departure punctuality

(all network scheduled flights)

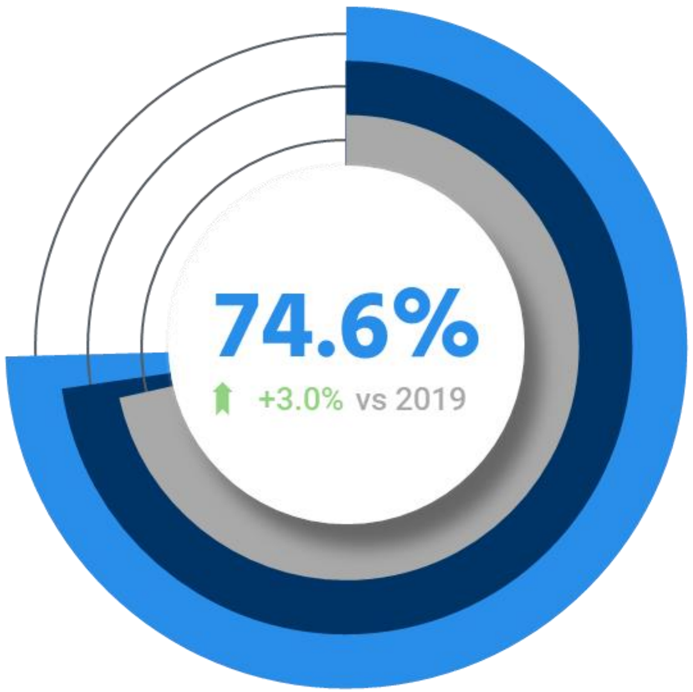
Week 05-11 May 2025

ARRIVAL PUNCTUALITY



75.6% in 2019
78.7% in 2024

DEPARTURE PUNCTUALITY



71.5% in 2019
72.7% in 2024

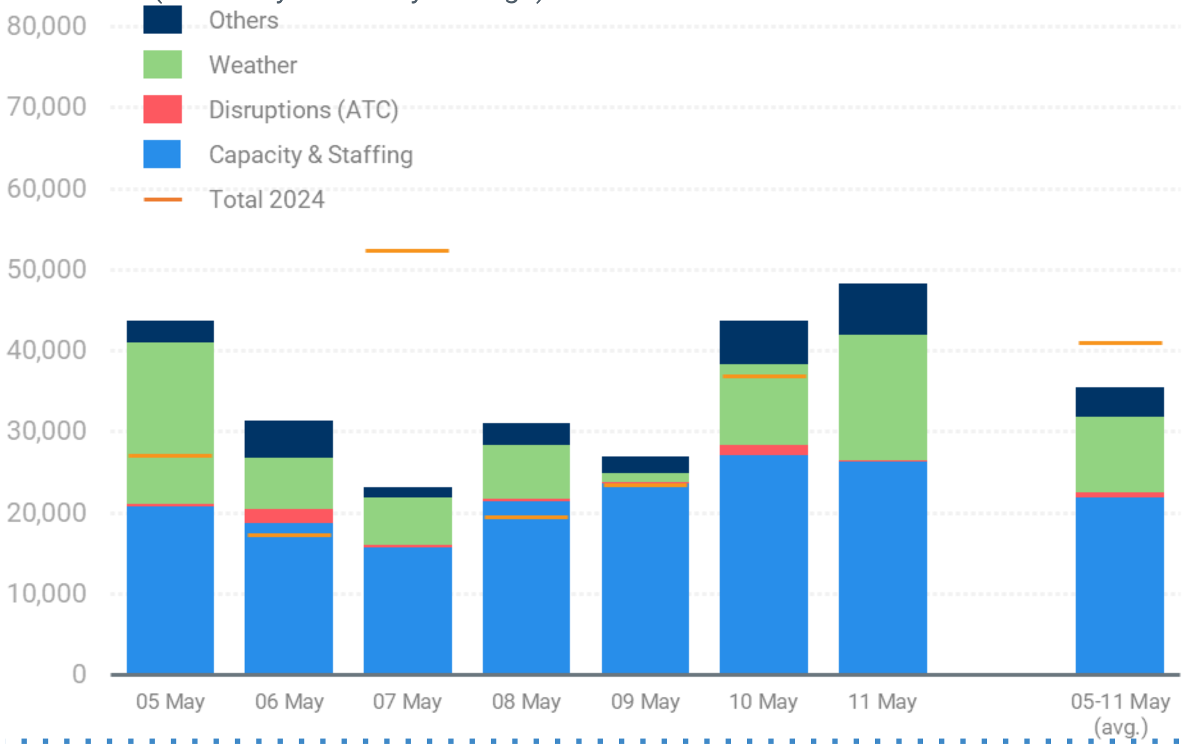
The pictures show the share of flights arriving/departing no later than 15 minutes after/before the scheduled time (OTP15).

- Network punctuality improved when compared to the equivalent week in 2024. Arrival punctuality increased by 1.0 percentage points to 79.7%, and departure punctuality increased by 1.9 percentage points to 74.6%. Compared to the same week in 2019, both arrival and departure punctuality are better (respectively +4.0pp and +3.0pp).
- Athens continued to experience daily ATC capacity regulations, with demand far exceeding the declared aerodrome ATFM arrival capacity.
- Amsterdam recorded delays due to ongoing work on runway (RWY 18L/36R) in the period 05-10 May, with the highest impact noted on Monday 05 May.
- Zürich experienced a combination of weather and aerodrome capacity regulations due to non-optimal RWY configuration owing to northeasterly winds.
- Nice experienced delays due to ATC capacity and ATC staffing causes, with Sunday 11 May recording the highest delays.
- Palma suffered from adverse weather (mainly cumulonimbus activity), with the highest ATFM delays recorded on Friday 09 and Sunday 11.

En-route ATFM delays

Delays per cause (EUROCONTROL Area)

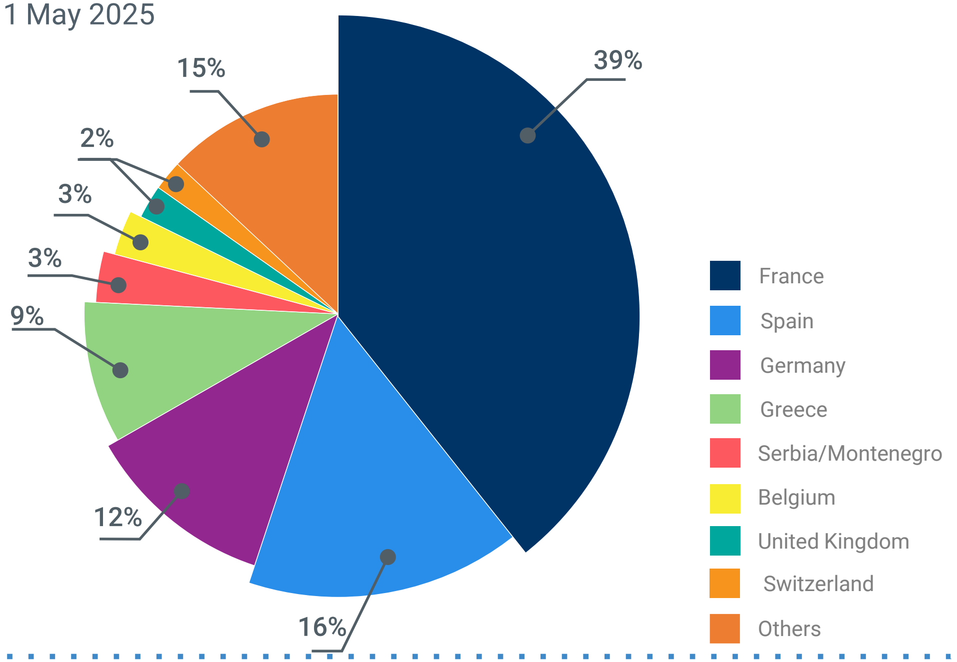
In minutes (total daily and 7-day average) in 2025



- Week 19 (05 - 11 May) registered fewer en-route ATFM delays compared to Week 18 (-36%), with an average of 35,466 daily minutes – 14% lower than the same operational week in 2024.
- ATC capacity/staffing was responsible for 62% of all en-route ATFM delays (notably in France and Germany). Weather's share of 26% was mainly due to convective activity in both south-west (Marseille and Barcelona ACCs) and south-east Europe (Serbia and Croatia ACCs).
- There was 1.9 min of total ATFM delay per flight in Week 19, made up of 1.1 min/flight en-route delay, and 0.8 min/flight airport delay. Total ATFM delay was 21% lower than in Week 18.

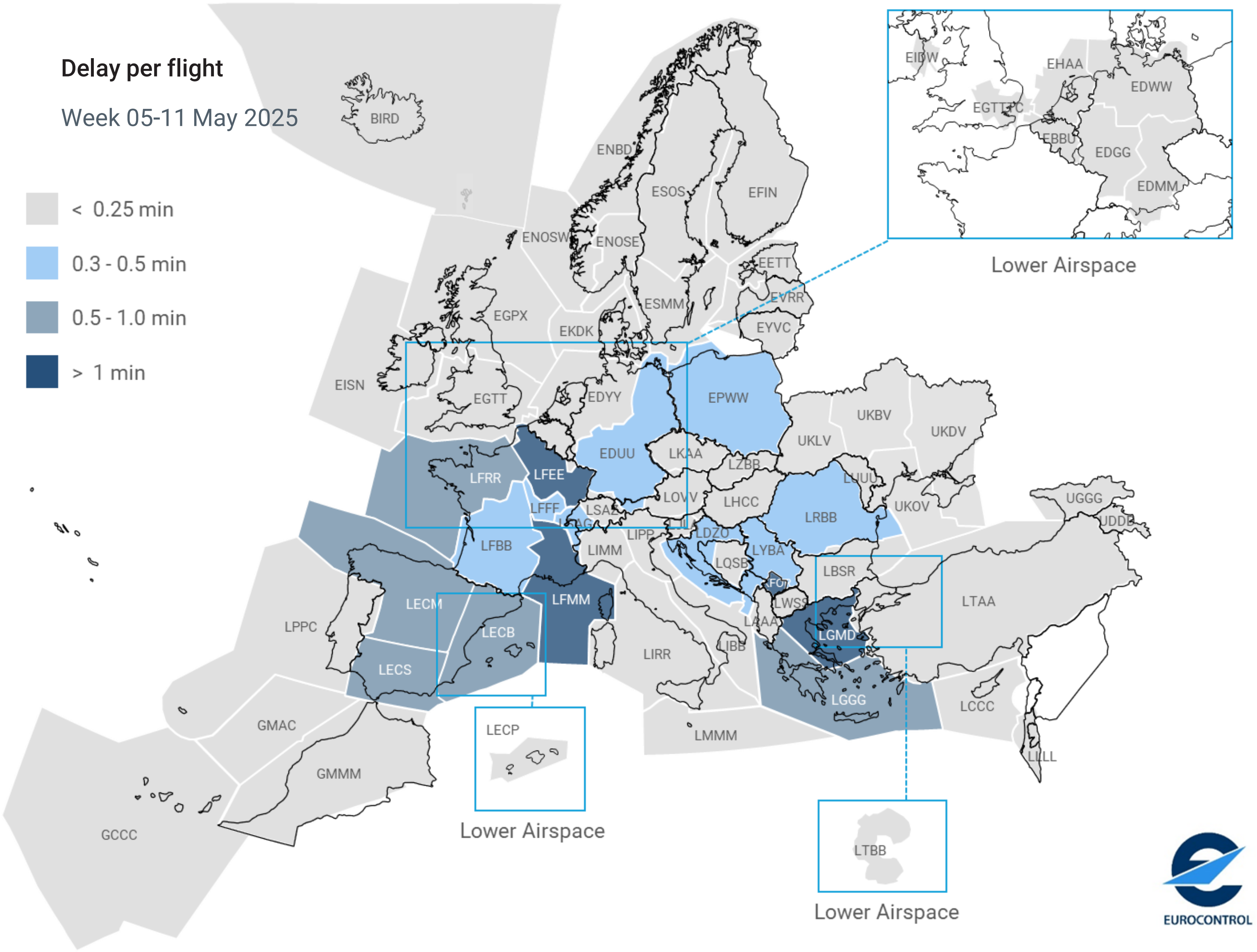
Share of en-route ATFM delays

Week 05-11 May 2025



- France accounted for 39% of all en-route ATFM delays, with Marseille ACC in particular generating 13.9pp of them (6.9pp capacity, 3.4pp staffing, 3.4pp weather); Reims ACC reporting 10.6pp (5.5pp capacity, 2.6pp staffing, 1.9pp weather); and Brest ACC accounting for 5.8pp (mainly 1.5pp capacity and 0.7pp staffing).
- Spain generated 16% of all en-route ATFM delays, mainly with Barcelona ACC producing 6.7pp of them (3.6pp capacity, 3.1pp weather). Madrid ACC added 5.6pp (2.1pp weather and 1.7pp capacity), and Seville ACC 3.3pp (2.9pp capacity).
- Germany was the source of 12% of all en-route ATFM delays: 7.2pp from Karlsruhe UAC generating (6.3pp capacity and 0.7pp staffing) and 2.4pp from Langen ACC (1.4pp capacity).

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



In Week 19 (05 – 11 May), four ACCs recorded en-route ATFM delays higher than 1.0 min/flight.

Marseille ACC recorded 1.3 min/flight, with Marseille-East ACC subject to significant capacity and ATC staffing issues through the week (with these likely to continue for the foreseeable future). Staffing issues are limiting sector availability and prompting ATFM delays. Convective weather cells further complicated traffic management, notably on Monday 05 and Sunday 11.

Reims ACC recorded 1.2 min/flight: demand, exceeding standard sector capacities. On Sunday, the ACC experienced clustered convective weather cells, causing aircraft to take avoidance action that and further limited the available capacity.

KFOR ACC recorded 1.1 min/flight owing to capacity delays, with demand +15% compared to 2024, and this compounded by adverse weather on Wednesday 07 and Thursday 08.

Makedonia ACC recorded 1.1 min/flight owing to staffing issues in the face of traffic 30% up on 2019 levels: negotiations continue around the issue of compensation for additional working hours by air traffic personnel during Summer 2025.

Sevilla ACC recorded 0.7 min/flight, with demand much higher than usual owing to the Seville Fair (+34% vs 2019 levels) and exceeding the limited sector availability. In addition, the ACC experienced weather delays on Thursday 08.

Top 10 States

Departures and arrivals

Week 05-11 May 2025

See more

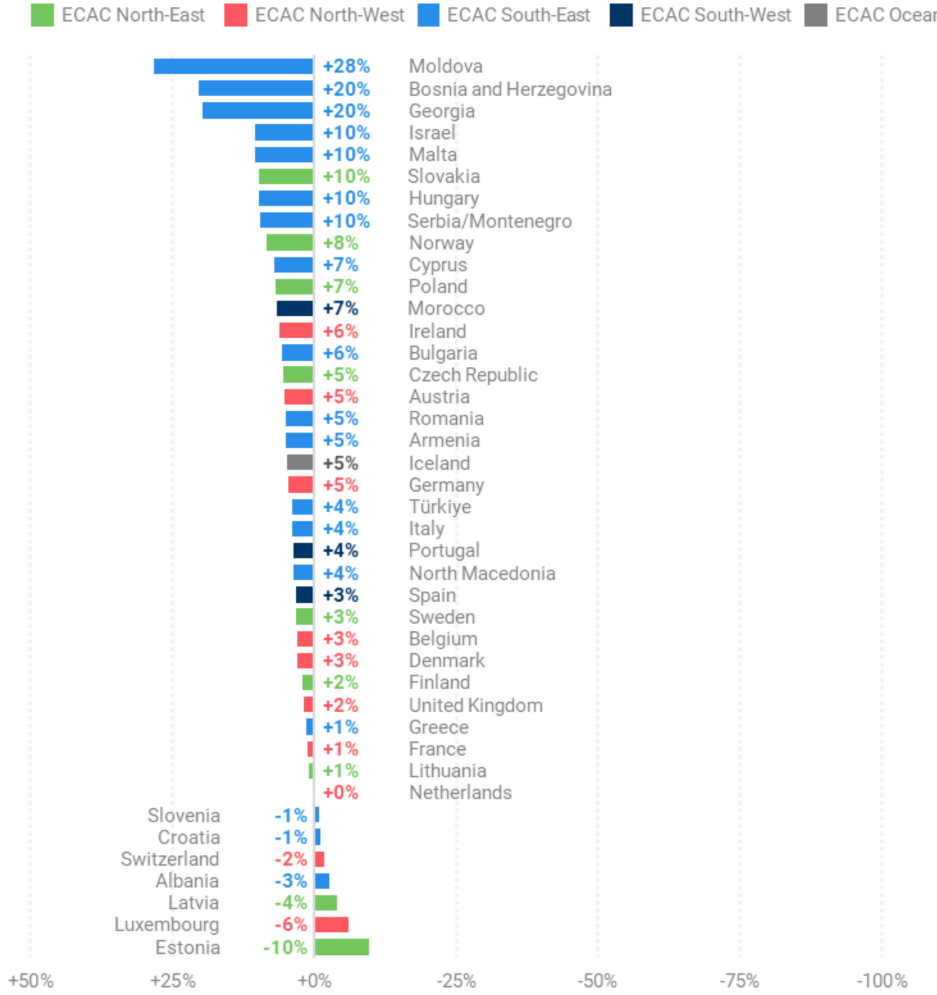
No.	Country	Average daily flights	% prev week	% prev year	% 2019
1.	United Kingdom	5,959	+3%	+2%	-4%
2.	Spain	5,547	+3%	+3%	+14%
3.	Germany	5,318	+4%	+5%	-11%
4.	France	4,406	+2%	+1%	+2%
5.	Italy	4,310	+3%	+4%	+12%
6.	Türkiye	3,369	+1%	+4%	+20%
7.	Netherlands	1,706	-1%	+0%	-5%
8.	Greece	1,647	+9%	+1%	+19%
9.	Norway	1,397	+5%	+8%	-8%
10.	Poland	1,379	+1%	+7%	+17%

- The top 10 States, in aggregate, recorded 2.7% more flights than in the previous week, with all States posting an increase on the previous week (except the Netherlands) and on the same week in the previous year.
- Greece recorded the greatest increase (+9% on the previous week), owing to increases on flows from/to UK (mainly from Jet2.com) and on domestic flows (small aircraft operators and from the Aegean Group).
- Netherlands recorded a slight decrease (-1% on previous week), owing to decreases from both small aircraft operators and KLM Group, mainly on domestic flows and flows with Germany, UK and Switzerland.
- Six States in the top 10 are recording traffic above 2019 levels (Türkiye, Greece, Poland, Spain, Italy and France), with the remainder between 4% and 11% below pre-COVID levels.

States in the EUROCONTROL network

Compared to the equivalent week in 2024

Dep/Arr flights for week 05-11 May 2025



*Based on integrated ANSP

Top 10 aircraft operators

Week 05-11 May 2025 (avg daily flights)

See more

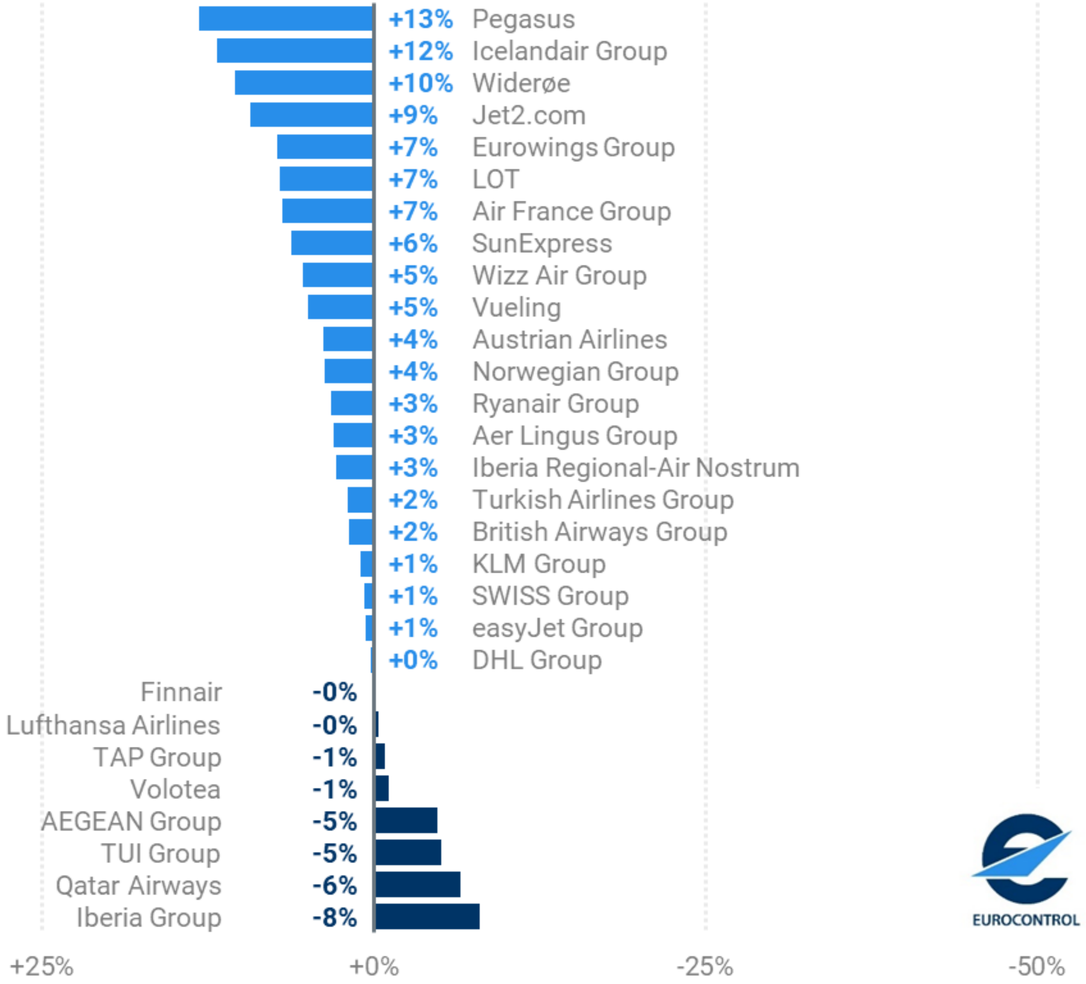
No.	Aircraft operator	Average daily flights	% prev week	% prev year	% 2019
1.	Ryanair Group	3,512	+1%	+3%	+41%
2.	easyJet Group	1,760	+1%	+1%	-2%
3.	Turkish Airlines Group	1,498	-1%	+2%	+14%
4.	Lufthansa Airlines	1,246	+2%	-0%	-23%
5.	Air France Group	1,113	+2%	+7%	-5%
6.	KLM Group	928	-2%	+1%	-1%
7.	British Airways Group	866	+0%	+2%	-7%
8.	Wizz Air Group	853	-3%	+5%	+43%
9.	SAS Group	762	+9%	+24%	-18%
10.	Vueling	654	+3%	+5%	+2%

- The top 10 aircraft operators, in aggregate, recorded slightly more (+1.1%) flights than in the previous week.
- Most of the aircraft operators in this top 10 increased their capacities from one week to another.
- SAS Group increased the most (+9% on previous week), mainly on domestic Sweden and domestic Norway flows.
- Compared with 2024, all the airlines/airline groups in this top 10 except Lufthansa Airlines recorded more flights – and four of the top 10 carriers/groups (Wizz Air, Ryanair, Turkish Airlines and Vueling) flying more than in 2019.

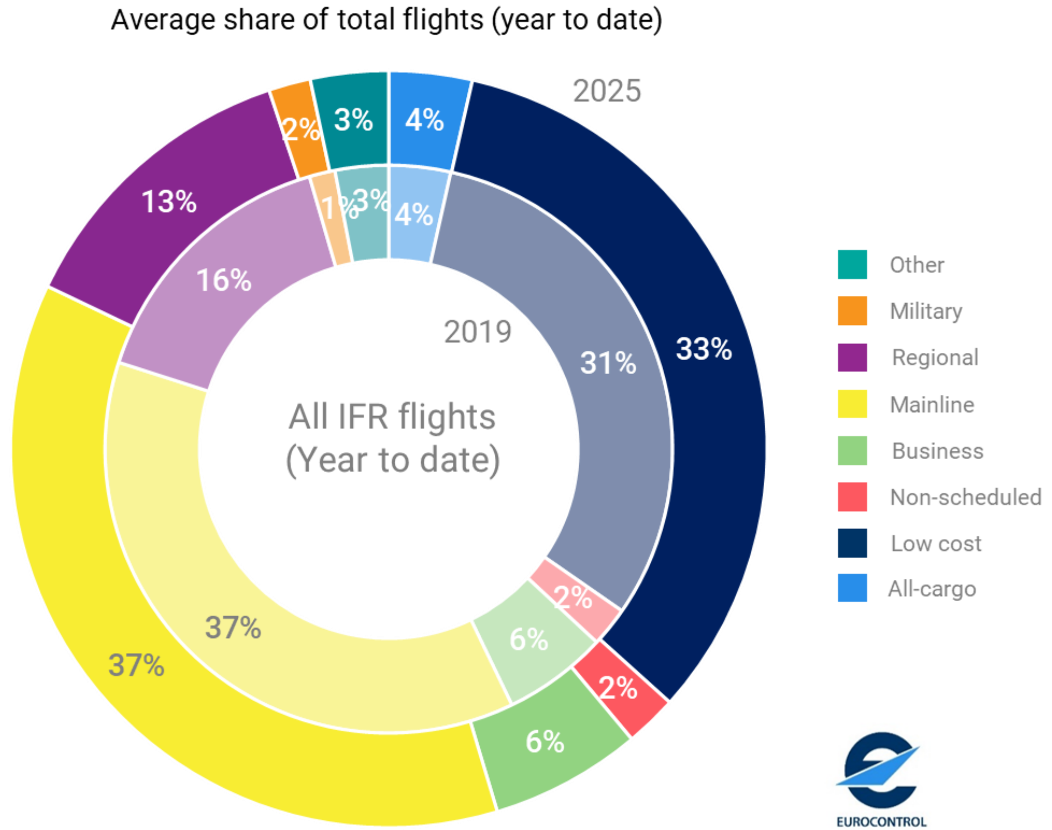
Aircraft operators in the EUROCONTROL Network

Compared to the equivalent week in 2024

Dep/Arr flights for Week 05-11 May 2025



Market segments in the EUROCONTROL network



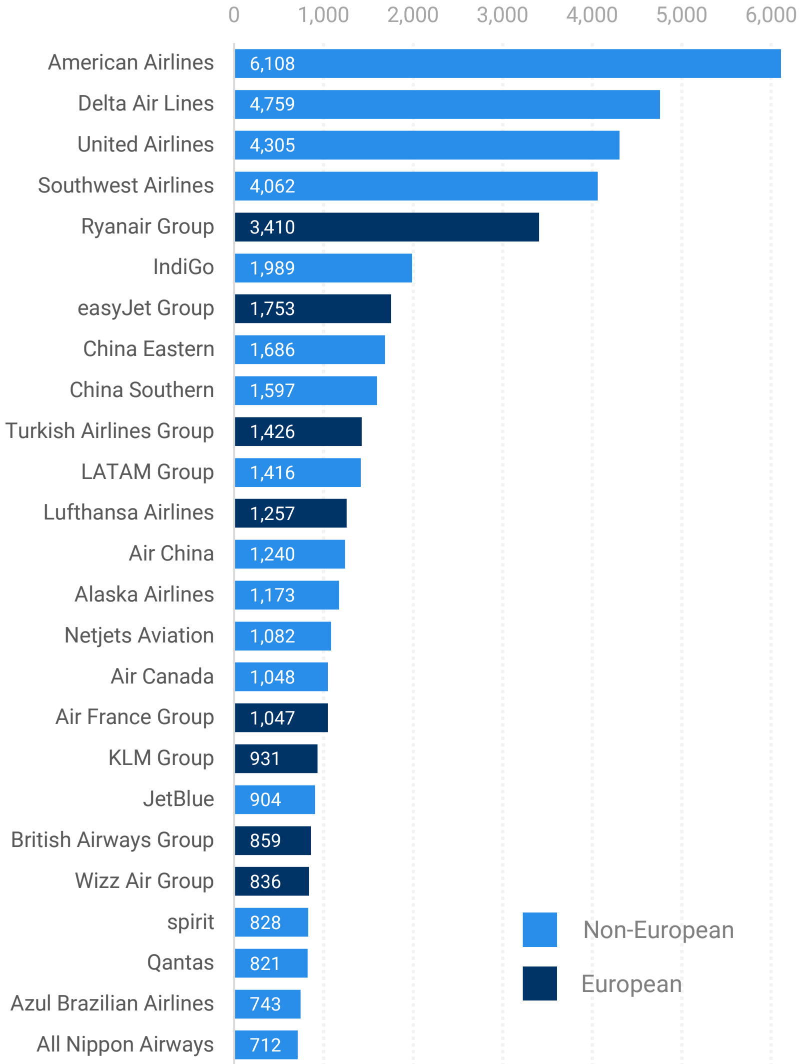
No.	Market segment	Avg. flights	% prev week	% prev year	% 2019
1.	Low Cost	11,278	+2%	+4%	+10%
2.	Mainline	11,190	+1%	+4%	+1%
3.	Regional	3,827	+1%	+2%	-14%
4.	Business	2,091	+8%	-2%	+16%
5.	Other	988	-2%	-2%	+11%
6.	All-cargo	970	+8%	+1%	+11%
7.	Non-Scheduled	846	+5%	+1%	-17%
8.	Military	542	+21%	+33%	+21%

- For the year to date, the largest market segment is Mainline with a 37% share, closely mirroring 2019. The second-largest segment (Low cost) has 33% of the market, up 2pp compared to 2019. Regional market share, however, has shrunk by 3pp to 13%. Finally, the 4% market share for All-cargo is comparable to the same period in 2019.
- Over the previous week, the number of flights has been positive with slight increases for Mainline (+1%), Regional (+1%) and Low cost (+2%); moderate increases for Non-scheduled (+5%) and a solid increase for All-cargo and Business aviation (+8% each).
- Six market segments recorded traffic above 2019 levels, notably Business aviation (+16%), All-cargo (+11%), Low cost (+10%) and Mainline (+1%). By contrast, just two market segments recorded traffic below 2019 levels: Regional (-14%) and Non-scheduled (-17%).

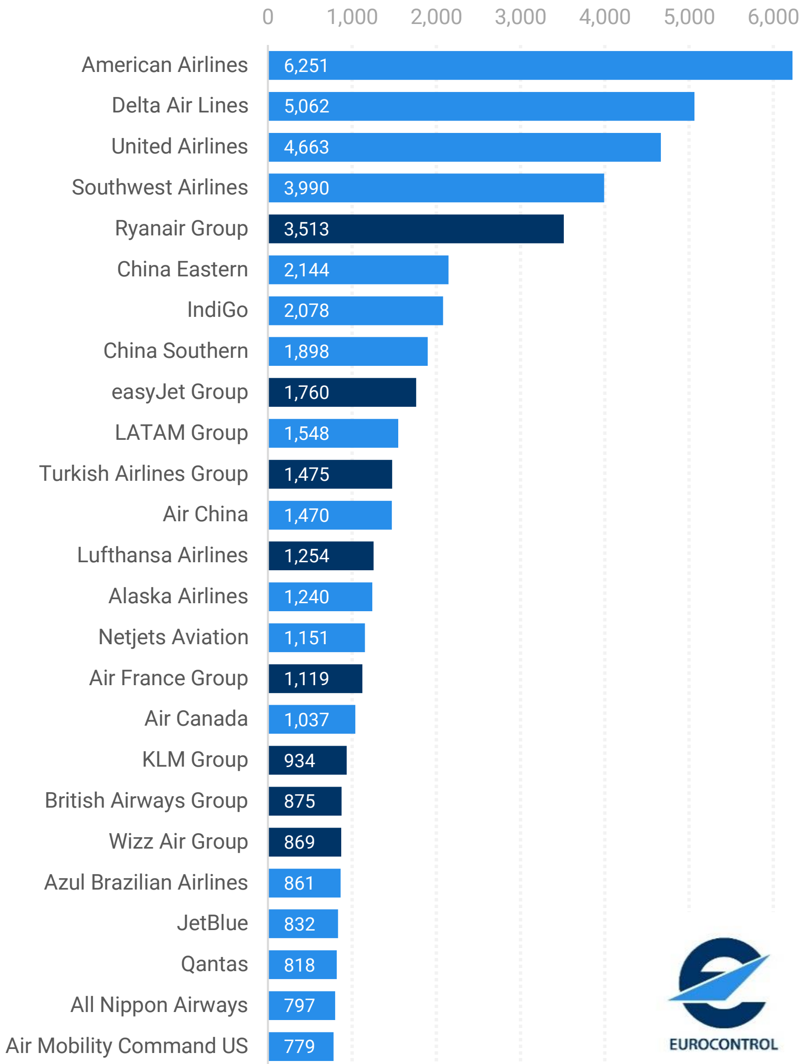
Top 25 global aircraft operators

(average daily departure flights)

7-day average (Week 05-11 May 2024)



7-day average (Week 05-11 May 2025)

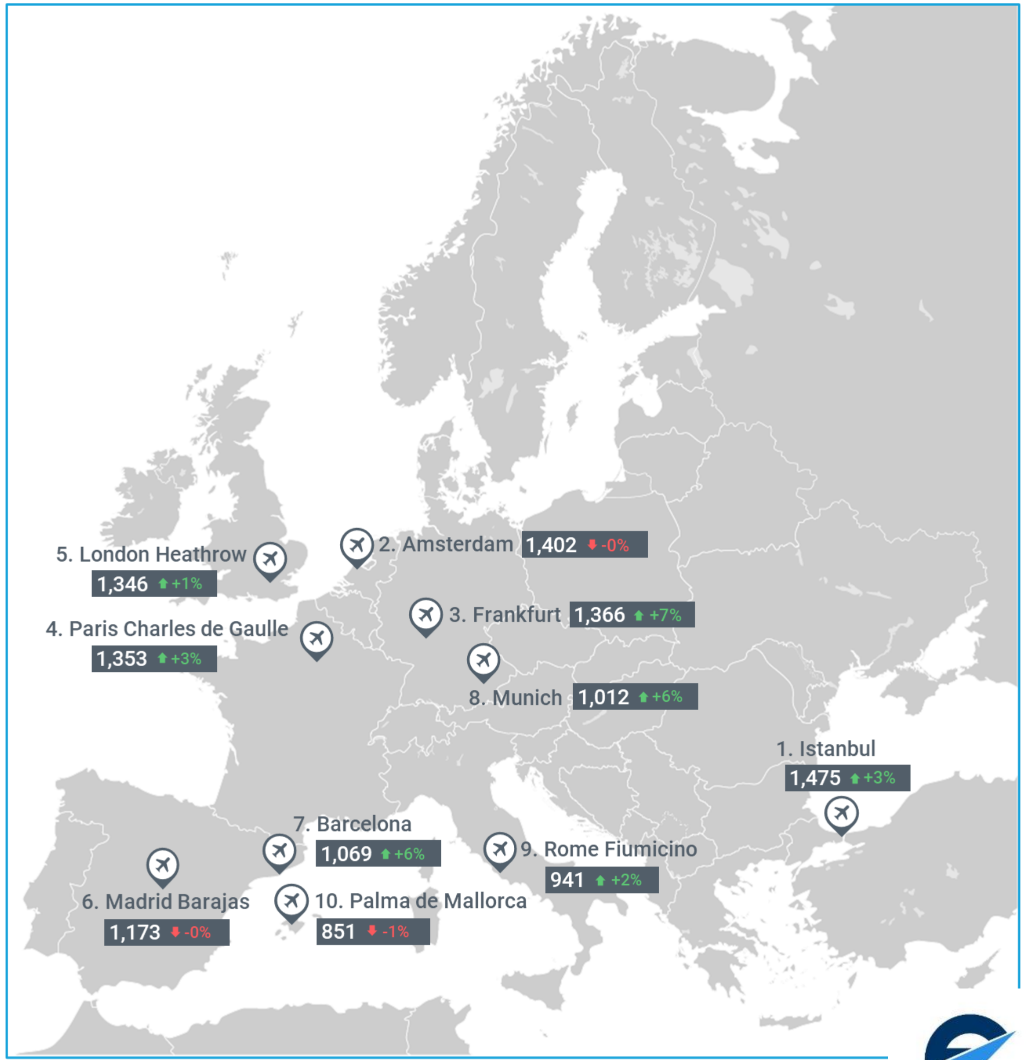


EUROCONTROL

Source: Flightradar24 Historical Global Utilisation data

- Over the last week, eight European airlines were ranked in the top 25 global aircraft operators – the same number as in the equivalent week last year.
- Two European airline groups make the global top 10: Ryanair Group in 5th, and the easyJet Group in 9th.
- The top 10s for Week 19 this year and last year closely resemble each other, with minor place modifications for China Eastern (was 8th, now 6th) and China Southern (was 9th, now 8th). However, LATAM Group displaces Turkish Airlines Group to move up to 10th place.
- Six more European carriers made the top 25, starting with Turkish Airlines Group (down to 11th), and followed by Lufthansa Airlines (13th), Air France Group (16th), KLM Group (18th), Wizz Air Group (19th), and British Airways Group (20th).

Top 10 airports



Airport ranking

Week 05-11 May 2025

See more

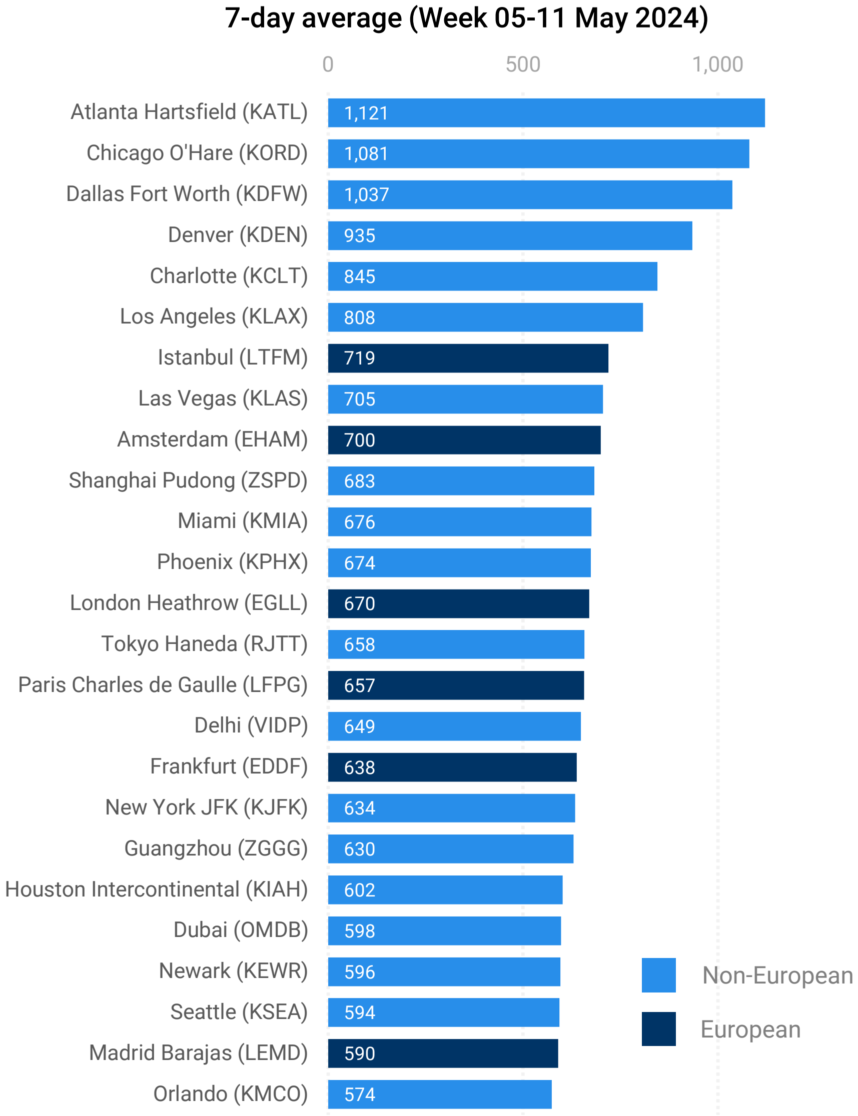
No.	Airport	Avg. daily dep/arr flights	% prev week	% prev year	% 2019
1.	Istanbul	1,475	-0%	+3%	+28%
2.	Amsterdam	1,402	-1%	-0%	-6%
3.	Frankfurt	1,366	+3%	+7%	-8%
4.	Paris Charles de Gaulle	1,353	+2%	+3%	-3%
5.	London Heathrow	1,346	-0%	+1%	+1%
6.	Madrid Barajas	1,173	+3%	-0%	-1%
7.	Barcelona	1,069	+3%	+6%	+7%
8.	Munich	1,012	+5%	+6%	-16%
9.	Rome Fiumicino	941	+0%	+2%	+6%
10.	Palma de Mallorca	851	+3%	-1%	+20%

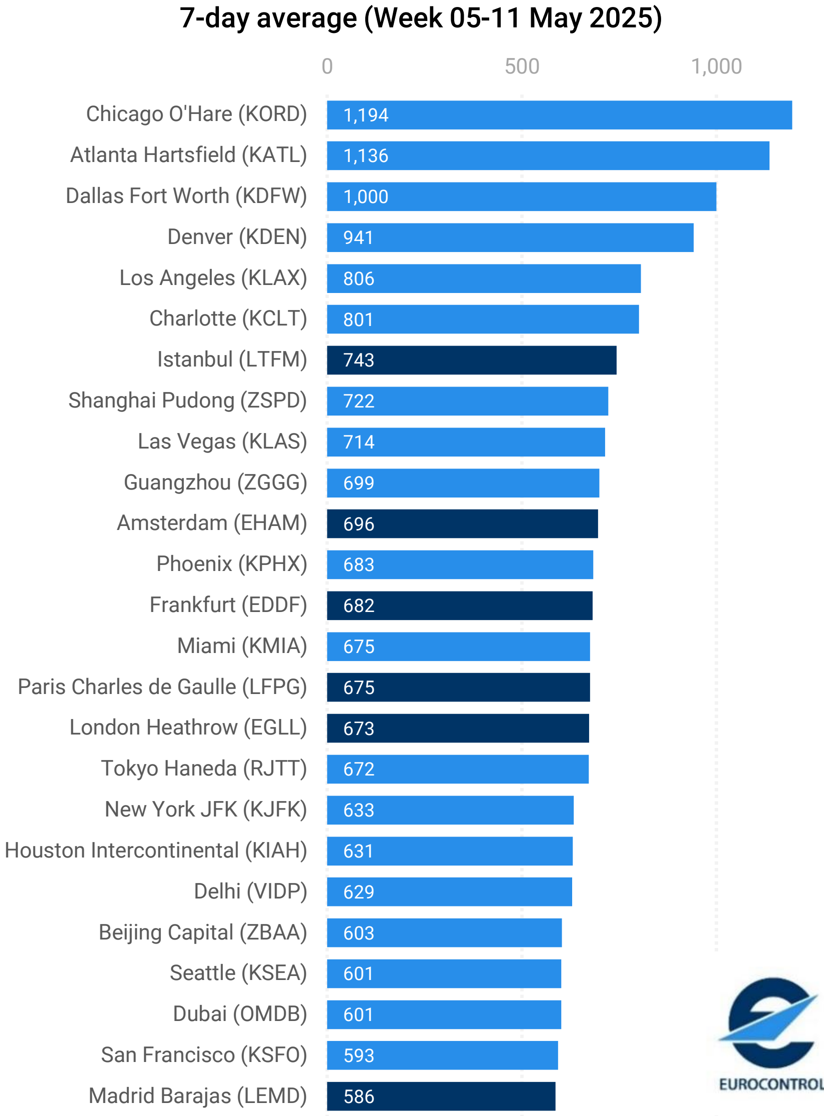
- Compared with the last edition, there only change in the top 10 is that Frankfurt and London Heathrow have swapped places.
- The busiest three in Week 19 were Istanbul (1,475 flights per day, -0.2% vs the previous week), followed by Amsterdam (1,402, -1.4%) and Frankfurt (1,366, +3%).
- Seven of Week 19's top airports recorded more flights than in the same week in 2024, with the highest growth recorded at Frankfurt (+7%), Barcelona and Munich (+6% each).
- Five of the top 10 airports (Istanbul, Palma de Mallorca, Barcelona, Rome and London) are currently handling traffic above their 2019 levels – the first two well over at +28% and +20% respectively.

EUROCONTROL

Top 25 global airport departures

(average daily departure flights)





EUROCONTROL

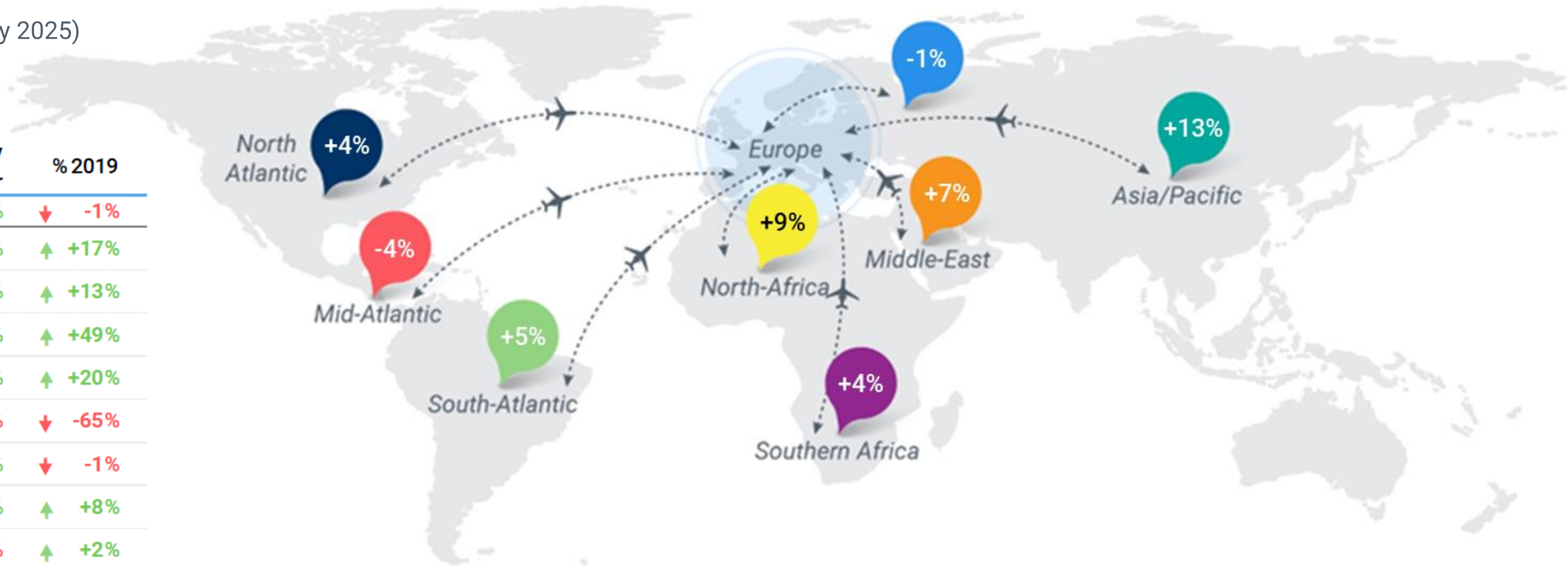
Source: Flightradar24 Historical Global Utilisation data

- Over the last week, six European airports made the top 25 in terms of global airport departures (the same number, and the same airports, as in the corresponding week in 2024).
- Four make the top 15, with Istanbul highest in 7th, followed by Amsterdam Schiphol (11th), Frankfurt (13th) and Paris CDG (15th).
- The other European airports to make the top 25 are London Heathrow (16th) and Madrid (25th).
- The top 10 global airports continue to be dominated by US airports, although with Chicago O'Hare moving ahead of Atlanta in 1st place. In total, 7/10 are American, 2 Chinese Shanghai Pudong (8th) and Guangzhou (10th), and the final place taken by Istanbul airport (7th, exactly the same ranking as last year).

Traffic flows

(average daily departure/arrival flights for week 05-11 May 2025)

Region	Average daily flights	% prev week	% prev year	% 2019
Intra-Europe	24,657	+3%	+3%	-1%
Europe ↔ North Atlantic	1,503	+5%	+4%	+17%
Europe ↔ Middle-East	1,374	-6%	+7%	+13%
Europe ↔ North-Africa	1,340	-2%	+9%	+49%
Europe ↔ Asia/Pacific	925	-1%	+13%	+20%
Europe ↔ Other Europe	399	-2%	-1%	-65%
Europe ↔ Southern Africa	283	-1%	+4%	-1%
Europe ↔ South-Atlantic	196	+0%	+5%	+8%
Europe ↔ Mid-Atlantic	157	-6%	-4%	+2%
Non Intra-Europe	6,176	-1%	+6%	+4%



- The main intra-European traffic flow recorded 24,657 daily flights last week, 3% higher than the previous week. Intercontinental flows amounted to 6,176 daily flights on average, -1% vs the levels of the previous week.
- The second-largest flow is with North America, with 1,503 flights per day (+5% compared with the previous week owing to increases on the Germany ↔ US, Italy ↔ US and France ↔ US flows). Flows to/from North America as the summer season starts have moved up 2 places from 4th place to 2nd, outpacing the Middle East and North Africa flows.
- The third-largest flow (to/from the Middle-East) saw 1,374 average daily flights, -6% compared with the previous week and owing mainly to decreases in the flows between North-West European States and Israel).
- The fourth-largest flow - with North Africa – is at 1,340 daily flights, -2% compared with the previous week owing to decreases on flows Egypt ↔ Germany, Egypt ↔ Italy and France ↔ Algeria.
- The flow between Europe and the Asia/Pacific region (925 flights per day) shows traffic +13% vs the same week in 2024, and +20% compared with 2019 levels.
- The flow to 'Other Europe' (including the Russian Federation) remains massively reduced, -65% lower than 2019.

Top 10 long-haul country pairs

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

Week 05-11 May 2025

No.	Country pair	Average daily flights	% prev week	% prev year	% 2019
1.	UK ↔ US	316	+0%	-3%	-1%
2.	Germany ↔ US	176	+7%	+10%	+6%
3.	France ↔ US	137	+6%	+3%	+18%
4.	Italy ↔ US	96	+11%	+3%	+26%
5.	Netherlands ↔ US	82	-1%	-2%	-5%
6.	Ireland ↔ US	81	+3%	+8%	+22%
7.	Spain ↔ US	81	+7%	+6%	+14%
8.	UAE ↔ UK	61	+0%	+1%	+38%
9.	Russia ↔ UAE	53	+2%	+19%	+2238%
10.	Egypt ↔ Russia	52	+4%	+39%	n/a

- The top 7 long-haul country pairs are all with the United States, the main three being between the US and the UK, Germany and France. The non-US related long-haul flows within the top 10 are UAE ↔ UK, Egypt ↔ Russia and Russia ↔ UAE.
- All but one long-haul flow posted an increase on the previous week, with the largest increases observed for the Italy ↔ US (+11%), Germany ↔ US and Spain ↔ US flows (+7% each). The only decrease was recorded on the Netherlands ↔ US (-1%) flow.
- Eight of the top 10 long-haul flows recorded more traffic vs 2024, with double-digit increases for three of them: Germany ↔ US , Egypt ↔ Russia and Russia ↔ UAE.
- Eight flows are currently above 2019 levels, notably Russia ↔ UAE (+2,238%), UAE ↔ UK (+38%) and Italy ↔ US (+26%).

Economics

Week 05-11 May 2025

09 May 2025
avg fuel price:

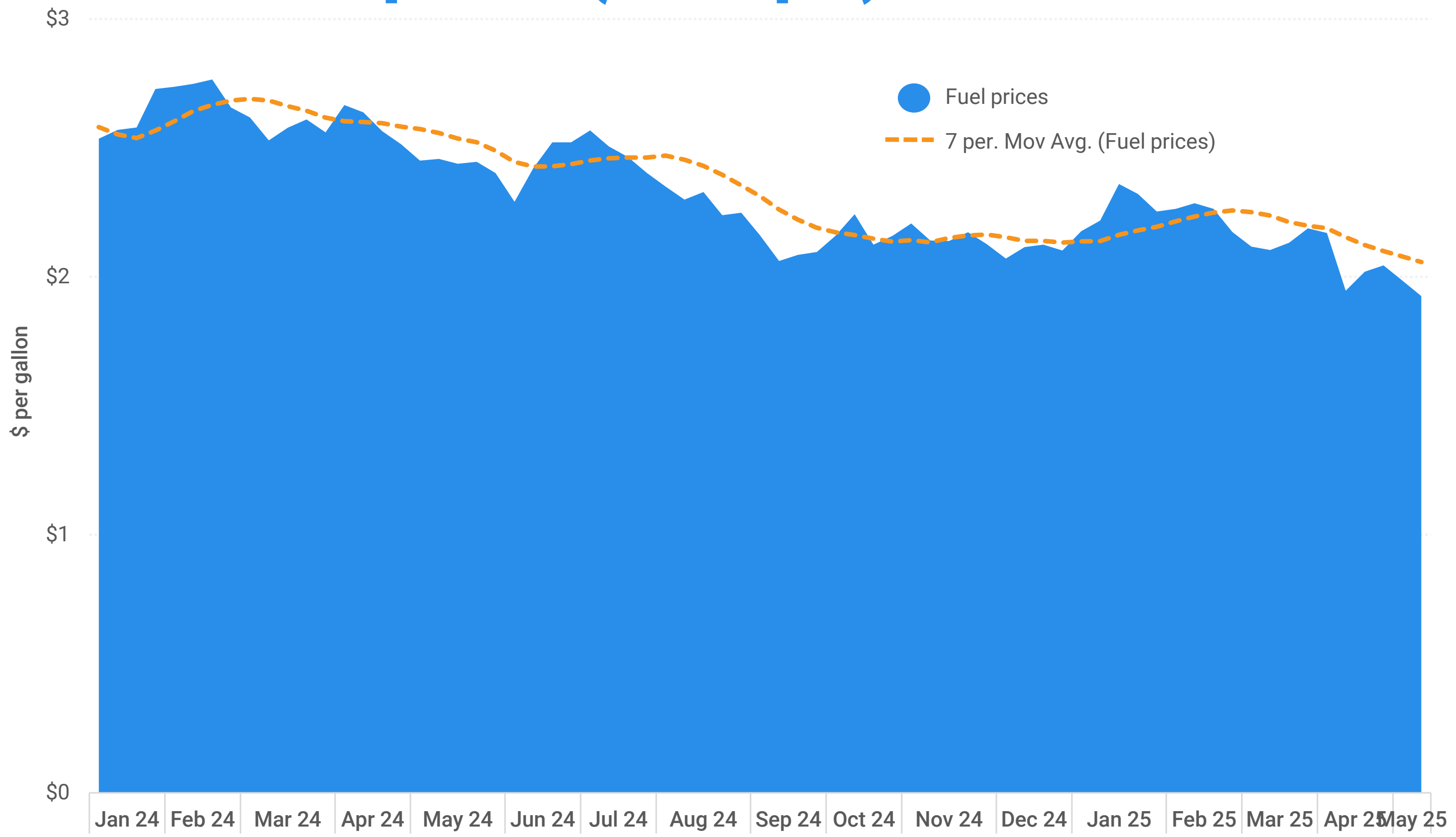
$1.93 /gallon

-6%

vs. $2.05 /gallon
on 25 Apr 2025

Source: IATA/Platts

Jet fuel price (Europe)

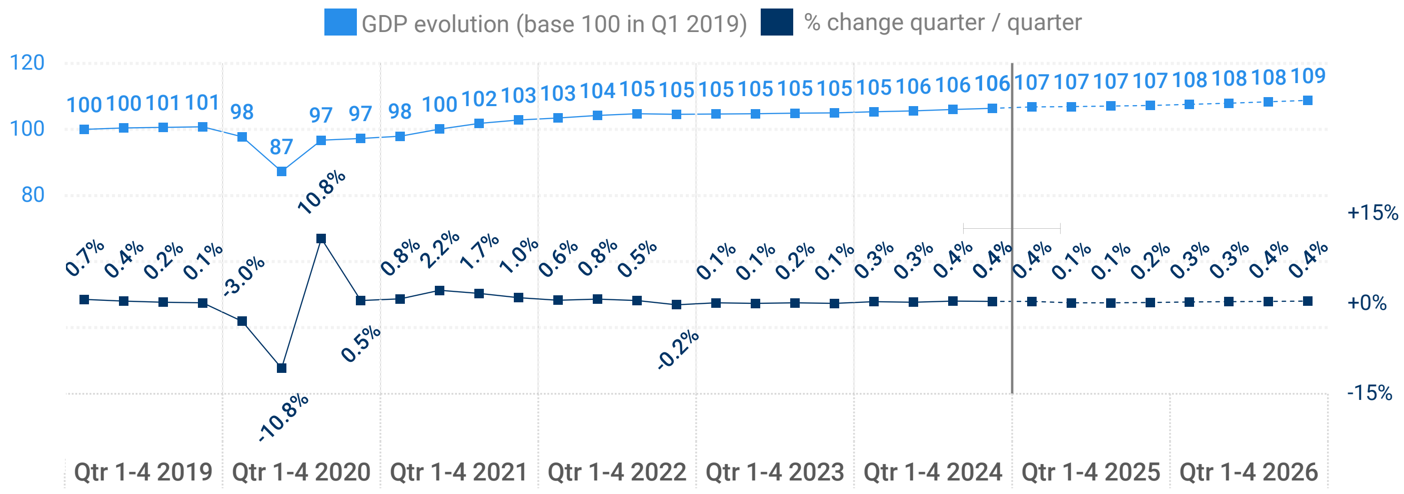


Source: IATA/Platts

- The average price of jet fuel closed at 1.93 USD/gallon on 09 May 2025, a drop of 6% on the level recorded two weeks ago.
- Since November 2023, OPEC+ members, which pump about half of the world's oil, have agreed voluntary output cuts of 2.2 million barrels/day to support the market. While these cuts were expected to be gradually phased out on a monthly basis as from December 2024, members agreed at the time to push back the start of oil output rises until April 2025, and extended the full unwinding of cuts by a year until the end of 2026, due to weak demand and booming production outside the group.
- However, in May 2025, OPEC+ members reconvened to announce that they intend to accelerate oil output hikes, which could bring back to the market as many as 2.2 million barrels per day by November. These gradual increases may however be paused or reversed subject to evolving market conditions.

GDP in the European Union

Constant prices and exchange rate, Euro

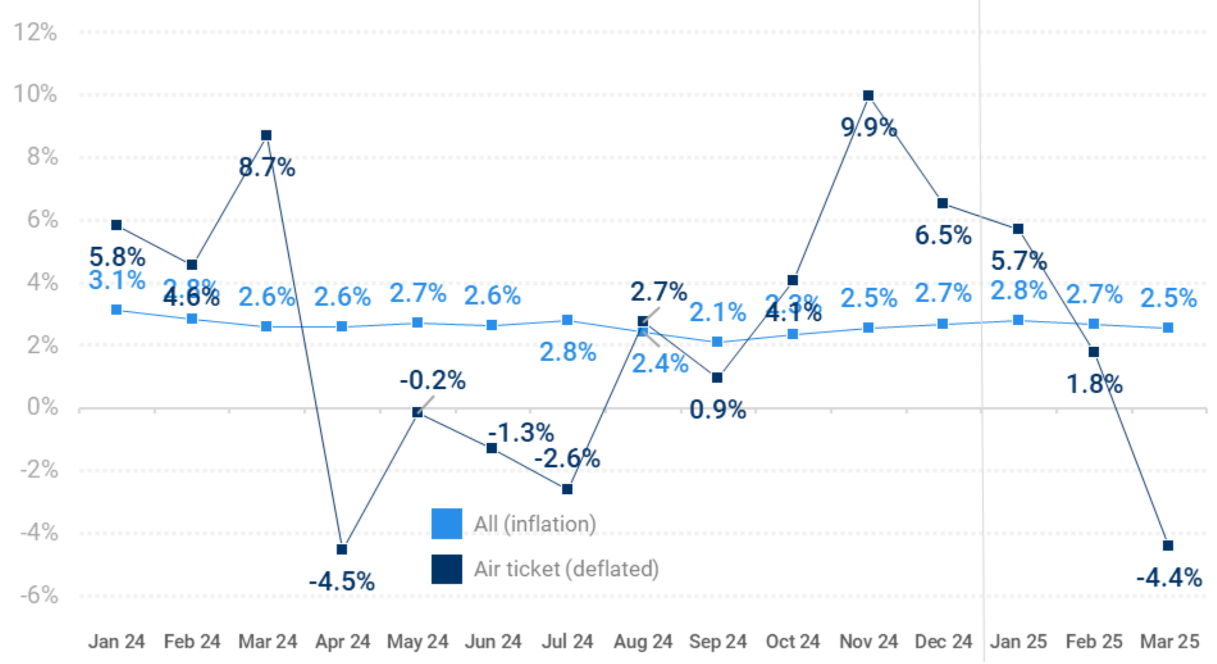


Source: Oxford Economics Ltd.
Last Update: May 2025

- According to the **latest GDP data from Oxford Economics (OE)**, the EU27 economies expanded by 0.4% during **Q1 2025** (vs Q4 2024). **Overall**, the **EU27** recorded **+0.96% growth** in **2024** compared to the previous year.
- For the **Q2 2025**, growth is forecasted to record **+0.1%** (vs the previous quarter). The **annual GDP growth** for the **EU27** zone is expected to reach **+1.1% in 2025,** and +1.1% in 2026.
- OE assumptions about US-EU tariffs have not changed since April 2025, and recent data continue to show **a slow but steady expansion** for the Eurozone.
- The balance of risks is more to the downside, however, as the assumed extension of the 10% US tariff could prove too optimistic. EU-US negotiations are unlikely to be smooth, and the 20% tariff could be reinstated.

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 March 2025 was 2.5% higher than in March 2024.
- **Air ticket prices** were -4.4% in real terms for March 2025 compared to the same month in 2024.
- This air ticket price decrease is important, because prices had increased in March 2024.
- Compared to February 2025, air ticket prices were 2% lower in March 2025.

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.

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 email us at: aviation.intelligence@eurocontrol.int

www.eurocontrol.int