AVIATION INTELLIGENCE+

EUROCONTROL

EUROPEAN AVIATION OVERVIEW

08-14 Dec 2025

18 December 2025

Headlines

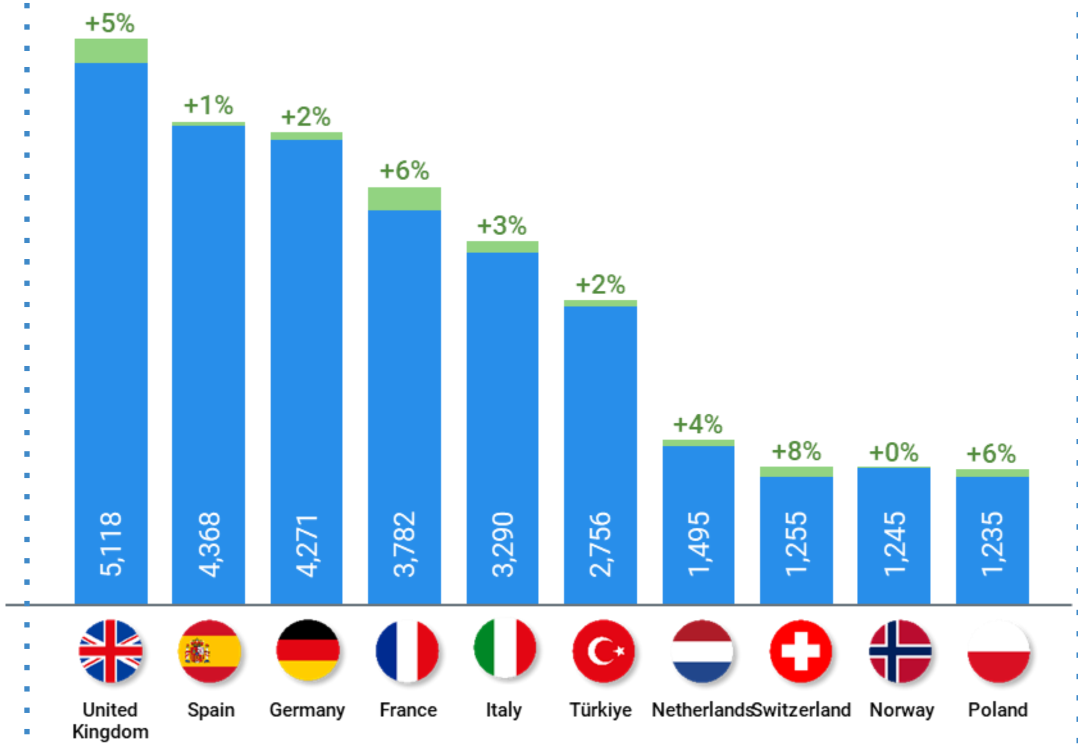
(Week 50, 08-14 Dec 2025)

- The network recorded 27,178 average daily flights in Week 50, 2.3% vs Week 49, +5.0% vs 2024 and +2.3% vs 2019.
- On average, the busiest 10 carriers operated higher capacities (+3.0%) compared to Week 49. Similarly, the busiest 10 States saw their overall flights increase by 3.3%.
- Year-to-date traffic is 99.9% of 2019, +4.3% vs 2024.
- Arrival and departure punctuality were 79.6% and 73.6%, slightly better than the same period last year.
- En-route ATFM delays were +43% compared to the previous week, with a daily average of around 12K delay minutes, 5% higher than 2024. Total ATFM delay per flight was 1.1 min/flight (0.4 for en-route, and 0.7 for airports).
- ATC capacity/staffing was the top delay cause (61% of all en-route ATFM delays), notably in Spain and Germany. Other factors were the second largest category (23%), mainly in France and Portugal.
- The top contributing Area Control Centres to en-route ATFM delays (in mins per flight) were Canarias, Skopje and Sevilla.
- The average jet fuel price closed at 2.16 USD/gallon on 12 December, -1% vs two weeks earlier.
- EUROCONTROL billed 862M€ in en-route air navigation charges in November 2025, 20% above the amount billed for November 2024 flights, reflecting more service units (+7.6%) and higher unit rates (+11%).

Top 10 busiest States

On week 08-14 Dec 2025

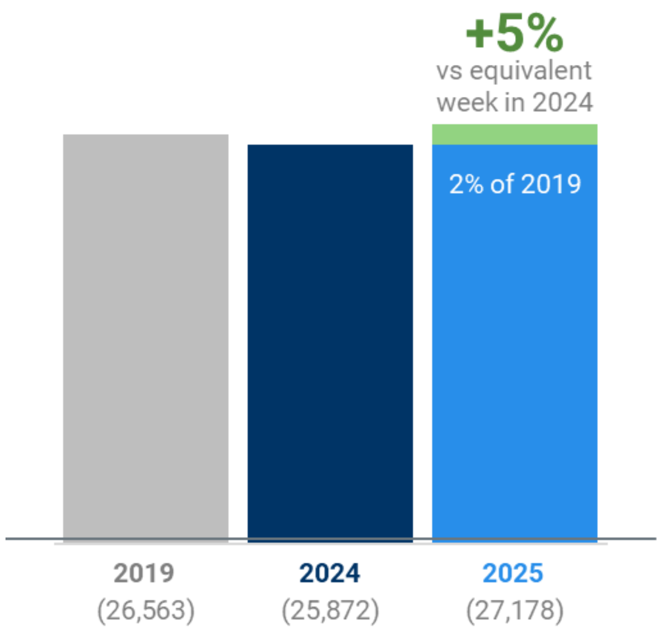
(all flights excl. overflights compared with previous week)



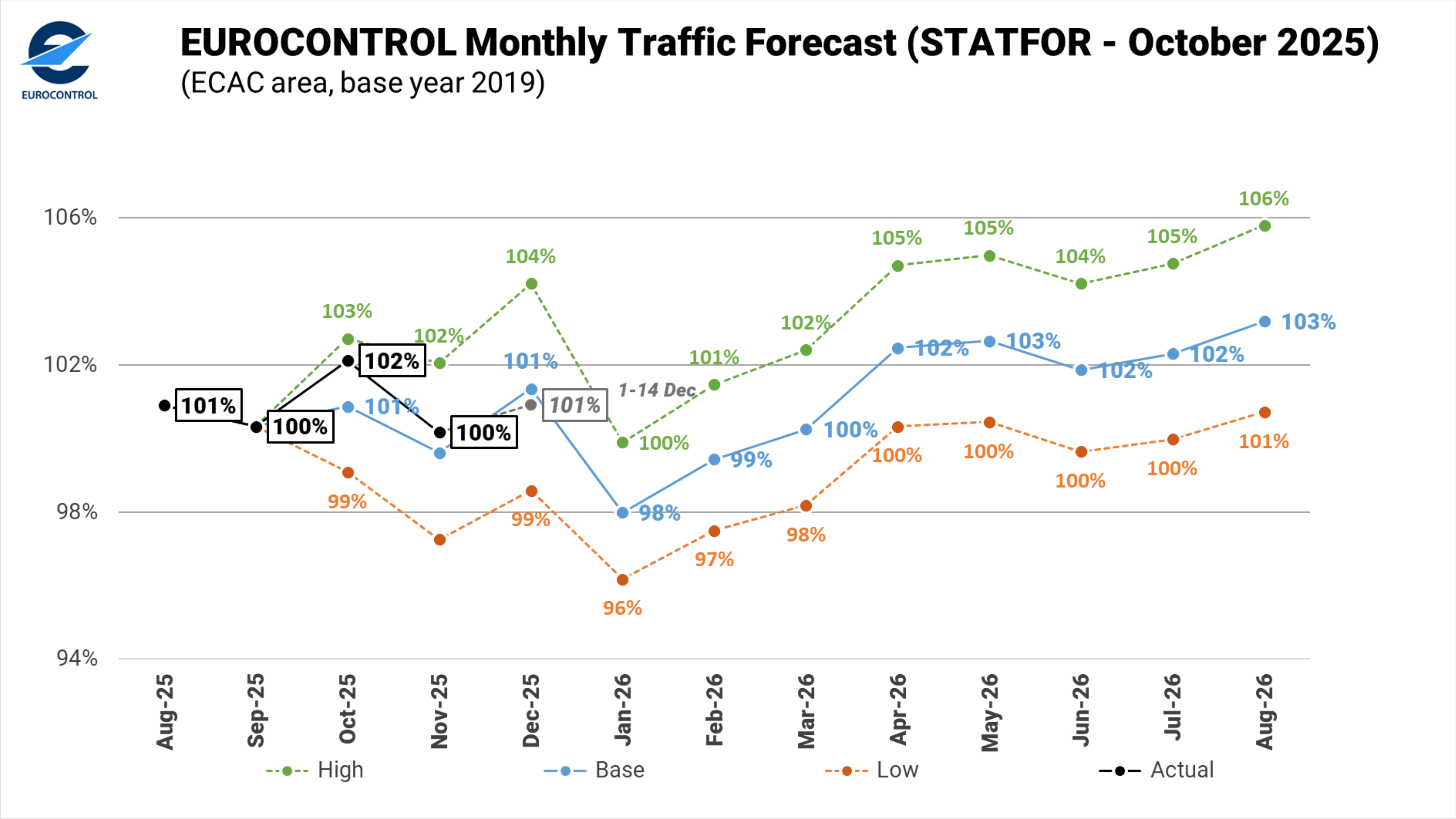
Traffic situation

Average daily flights (including overflights)

Week 08-14 Dec 2025



Overall situation compared to the EUROCONTROL Monthly Traffic Forecast



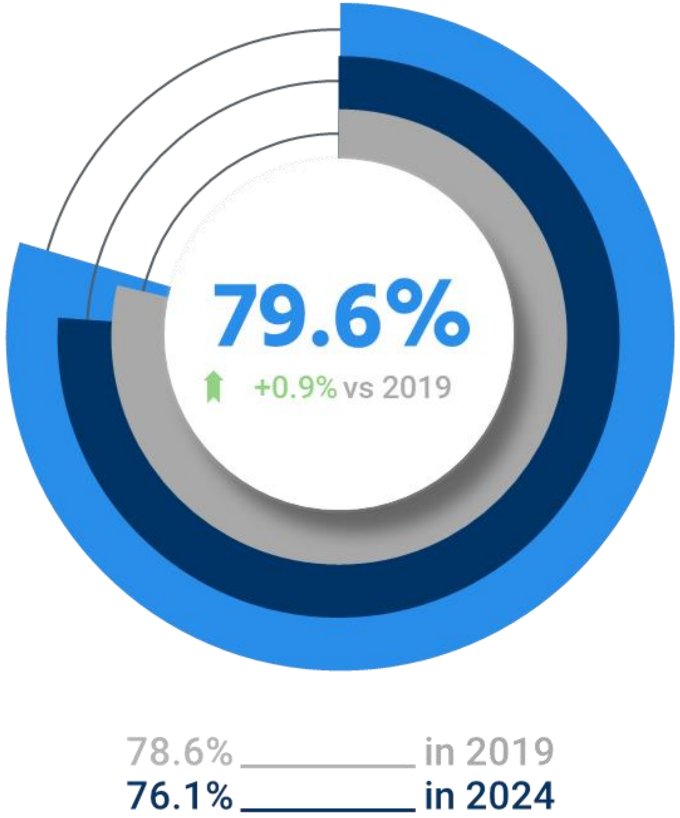
- European traffic (flights) evolves in line with the Base scenario at ECAC level of the EUROCONTROL STATFOR flight forecast (2025-2031), which was published in October 2025.
- The number of flights in the first 14 days of December 2025 is at the level planned for December in the October 2025 STATFOR forecast.

Arrival & departure punctuality

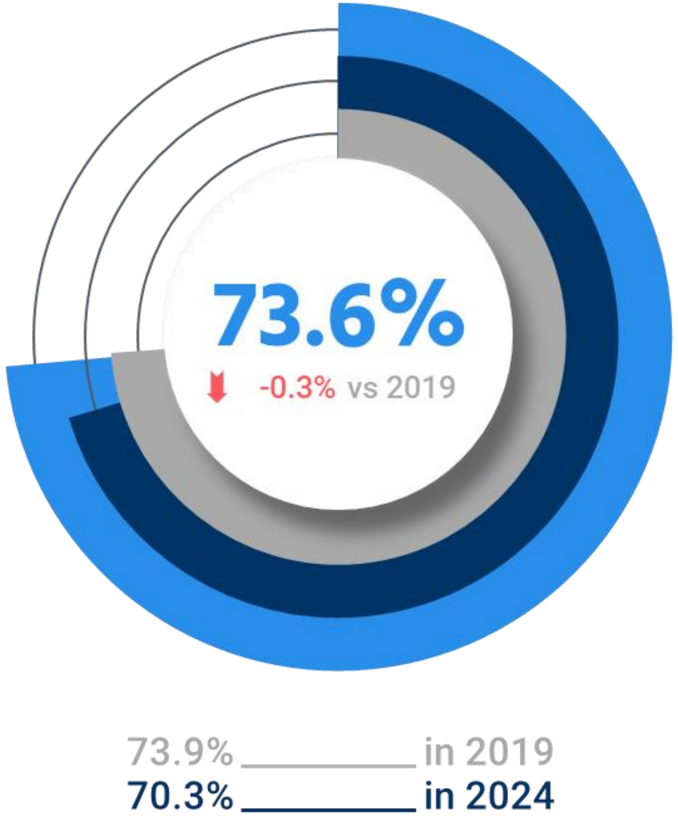
(all network scheduled flights)

Week 08-14 Dec 2025

ARRIVAL PUNCTUALITY



DEPARTURE PUNCTUALITY



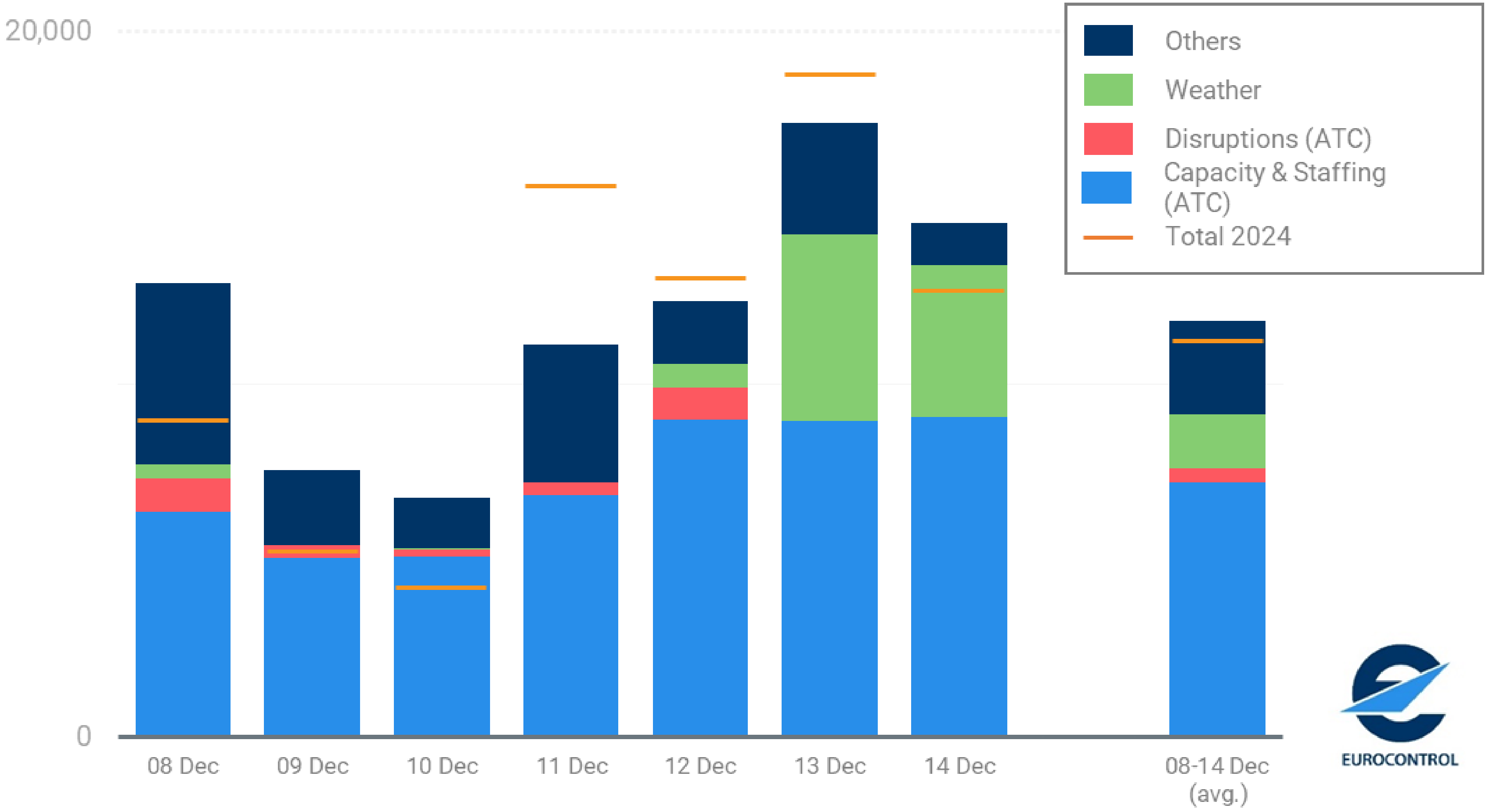
The pictures show the share of flights arriving/departing no later than 15 minutes after/before the scheduled time (OTP15).

- At network level, arrival punctuality (79.6%) was 3.5pp higher than the equivalent week of 2024; departure punctuality (73.6%) was similarly higher (+3.3pp).
- Compared to the same week in 2019, arrival punctuality was higher (+0.9pp) while departure punctuality was lower (-0.3pp).
- Manchester saw an increase in arrival ATFM delays following on-going taxiway works in progress (Work In Progress) with 14 December seeing high delays.
- London Heathrow suffered from weather regulations (Low Visibility Procedures as well as strong winds) during the week.
- Amsterdam also suffered from weather (low ceiling) as well as daily aerodrome capacity regulations.
- Paris Orly saw multiple days impacted by weather (fog and associated low cloud ceiling) with 13 and 14 December seeing the highest delays.
- Vienna also suffered from weather (Low Visibility Procedures) with 12 December recording the highest delays.

En-route ATFM delays

Delays per cause (EUROCONTROL Area)

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

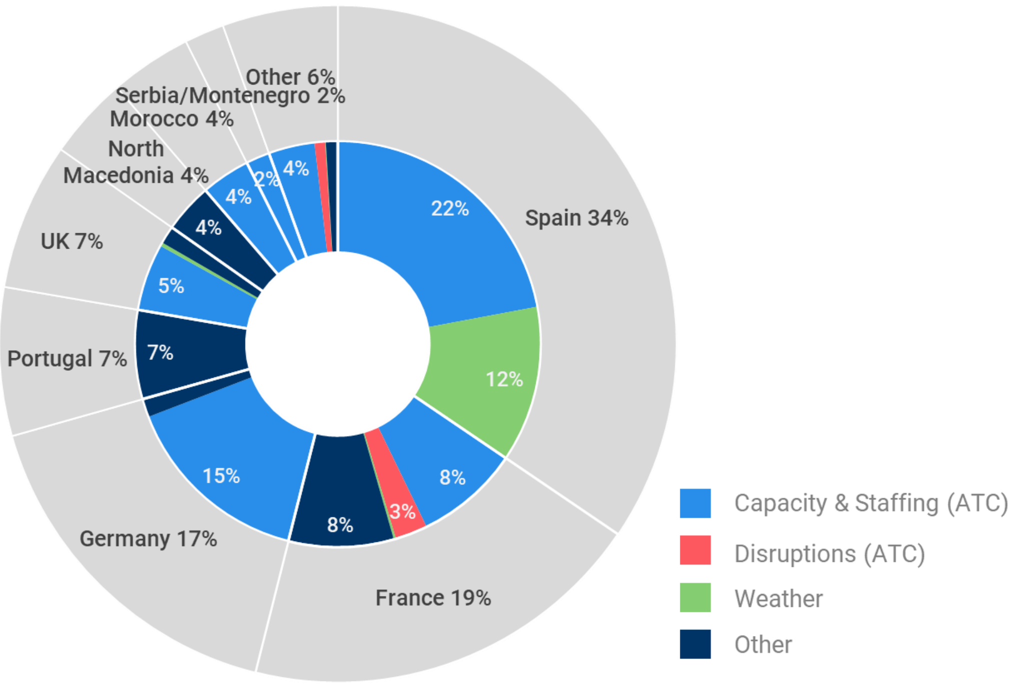


- Week 50 registered lower en-route ATFM delays compared to the previous week (+43%), with an average of 11,811 daily minutes; this is 5% higher than the same operational week in 2024.
- ATC capacity/staffing were responsible for 61% of all en-route ATFM delays (notably in Spain, Germany).
- Other factors accounted for 23% of all en-route ATFM delays (mainly in France and Portugal).
- There were 1.1 minutes of total ATFM delay per flight in Week 50, made up of 0.4 min/flight en-route delay, and 0.7 min/flight airport delay.

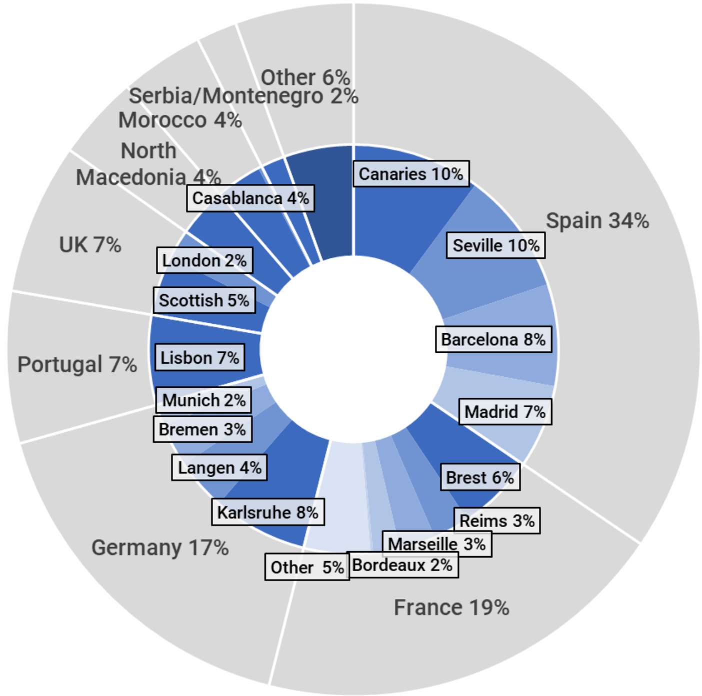
En-route ATFM delays per States per cause & per ACC

Week 08-14 Dec 2025

En-route ATFM delays per cause for top 8 States

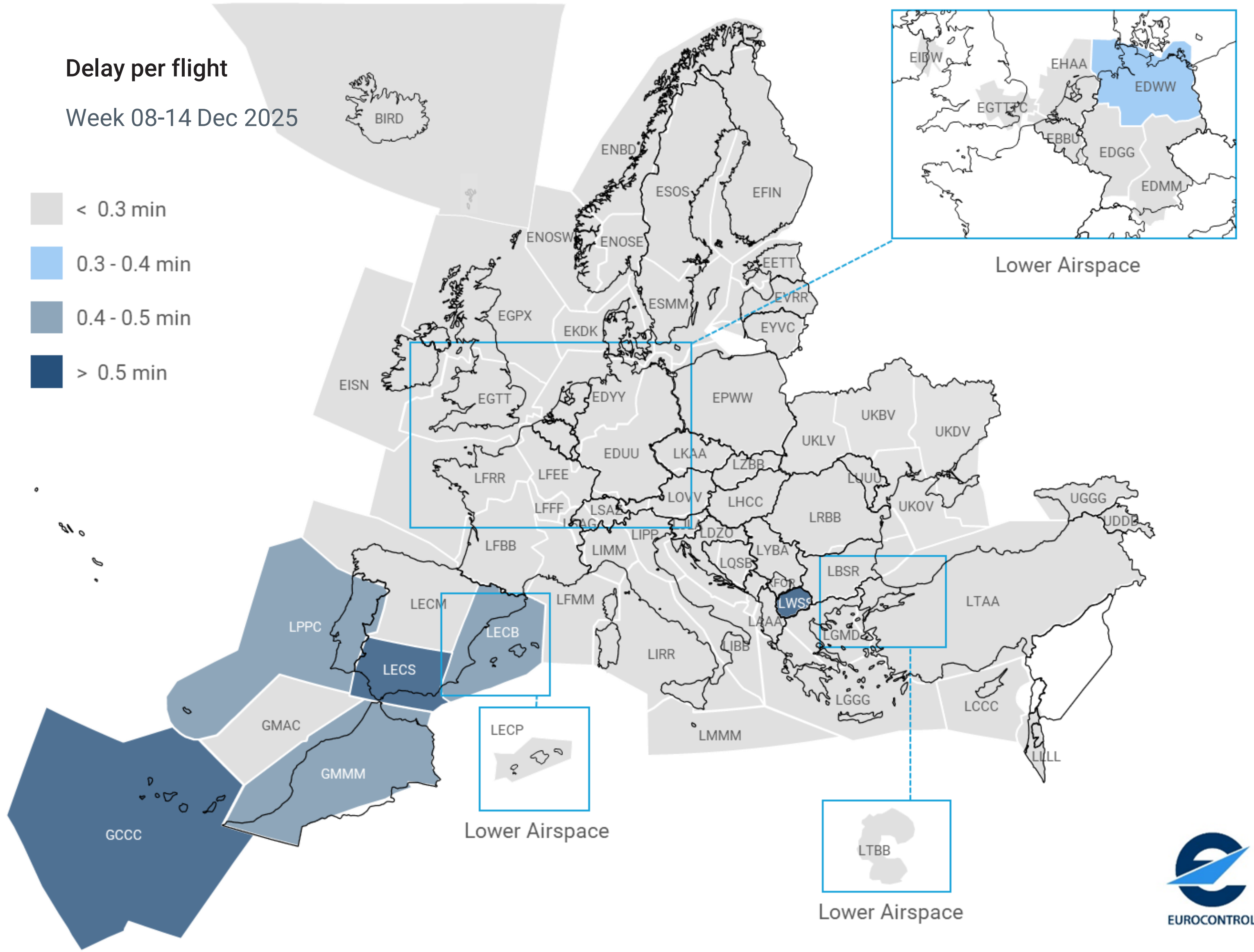


En-route ATFM delays per ACC for top 8 States



- Spain comprised 34% of en-route ATFM delays; these were mainly attributed to Canaries ACC (10%), Sevilla ACC (10%), Barcelona ACC (8%) and Madrid ACC (7%), and were mainly due to Capacity & Staffing (22%) and Weather (12%).
- France accounted for 19% of en-route ATFM delays; mainly attributed to Brest ACC (6%), Reims ACC (3%), Marseille ACC (3%) and Bordeaux ACC (2%), and primarily due to Capacity & Staffing (8%) and Other (8%).
- Germany made up 17% of en-route ATFM delays; these were mainly attributed to Karlsruhe UAC (8%) and were driven by Capacity & Staffing (15%).

En-route ATFM delayed flights per Area Control Centre



- In Week 50, three ACCs recorded en-route ATFM delays between 0.5 and 1.0 minute/flight: Canarias ACC (0.95 min/flight), Skopje ACC (0.87 min/flight) and Sevilla ACC (0.79 min/flight).
- The top contributing ACCs in terms of en-route ATFM minutes per flight were as follows:
  - Canarias ACC was affected by ATC capacity delays during the week, with additional weather delays on Friday and Saturday due to Storm Emilia.
  - Skopje ACC lower and upper sectors were regulated throughout the week due to a special event (new ATM system implementation).
  - Sevilla ACC faced daily ATC capacity delays, and staffing issues at the start and end of the week. There were also weather delays on Friday and Sunday.
  - Lisbon ACC arrivals were regulated due to weather at the start and end of the week.
  - Casablanca ACC experienced ATC capacity delays from Wednesday until Sunday (traffic +14% vs 2024 levels).

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Busiest 10 States

Departures and arrivals

Week 08-14 Dec 2025

No.	Country	Average daily flights	% prev week	% prev year	% 2019
1.	United Kingdom	5,118	+5%	+1%	-2%
2.	Spain	4,368	+1%	+4%	+19%
3.	Germany	4,271	+2%	+3%	-15%
4.	France	3,782	+6%	+4%	+3%
5.	Italy	3,290	+3%	+6%	+11%
6.	Türkiye	2,756	+2%	+8%	+29%
7.	Netherlands	1,495	+4%	+1%	-1%
8.	Switzerland	1,255	+8%	+4%	+4%
9.	Norway	1,245	+0%	+6%	-7%
10.	Poland	1,235	+6%	+15%	+17%

See all States

The busiest 10 States, in aggregate, recorded 3.3% more flights during Week 50 than in the previous week.

All States posted increases in arrivals and departures compared to the previous week.

The main increases compared to the previous week were recorded for:

- Switzerland (+8%): increase mainly on the flow with UK and for easyJet Group.
- Poland (+6%): increase mainly on the domestic flow and for LOT and Wizz Air Group.
- France (+6%): increase mainly on the domestic flow and flows with UK for easyJet Group and Air France Group.
- UK (+5%): increase on flows with France, Switzerland, domestic and largely driven by easyJet Group.

Compared to 2024, all States posted increases in arrival and departure flights, with Poland leading (+15%).

Compared to 2019, there are wide traffic differences: six States in the busiest 10 recorded traffic from +3% (France) to as much as +29% (Türkiye), while four recorded levels between -1% (Netherlands) and -15% (Germany).

Busiest 10 aircraft operators

Week 08-14 Dec 2025 (avg daily flights)

No.	Aircraft operator	Average daily flights	% prev week	% prev year	% 2019
1.	Ryanair Group	2,619	+1%	+7%	+31%
2.	easyJet Group	1,571	+13%	+4%	+6%
3.	Turkish Airlines Group	1,508	+1%	+10%	+27%
4.	Lufthansa Airlines	1,033	+0%	-5%	-27%
5.	Air France Group	985	+5%	+6%	-8%
6.	Wizz Air Group	926	+7%	+17%	+63%
7.	British Airways Group	820	+1%	+0%	-6%
8.	KLM Group	801	+1%	+1%	+7%
9.	SAS Group	680	-3%	+32%	-11%
10.	Pegasus	582	+3%	+15%	+30%

See top 40 airlines

- The busiest 10 aircraft operators, in aggregate, recorded 3.0% more flights compared to the previous week.
- All but one (SAS Group) of the 10 busiest aircraft operators increased their capacity compared to the previous week, ranging from +0% for Lufthansa Group to +13% for easyJet Group.
- The main increases compared to the previous week were recorded for:
  - easyJet Group (+13%): increases mainly on the flows Switzerland ↔ UK, Spain ↔ UK and France ↔ UK.
  - Wizz Air Group (+7%): increases mainly on the flows Italy ↔ Spain and Italy ↔ Romania.
  - Air France Group (+5%): increases mainly on flows France ↔ Italy, France ↔ Spain and France domestic.
- Compared to 2024, all but one of the busiest 10 aircraft operators (Lufthansa) recorded more flights, notably SAS (+32%), Wizz Air Group (+17%), Pegasus (+15%), Turkish Airlines (+10%), Ryanair Group (+7%), Air France Group (+6%) and easyJet Group (+4%).
- Compared to 2019, six of the busiest 10 aircraft operators (Wizz Air Group, Ryanair Group, Pegasus, Turkish Airlines Group, KLM Group and easyJet Group) operated more flights than in 2019 – and, for the first four, significantly more (+63%, +31%, +30% 27% respectively).

Europe's 6 largest airline groups

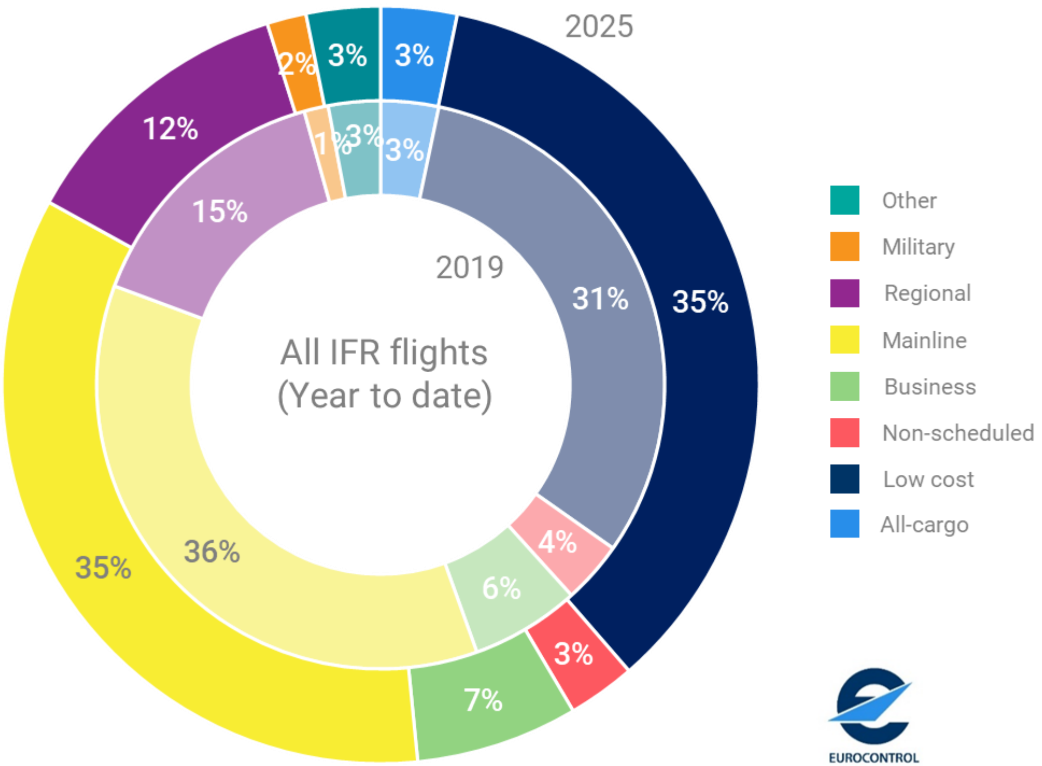
Week 08-14 Dec 2025 (average daily flights)

No.	Aircraft operator	Average daily flights	% prev week	% prev year	% 2019
1.	Ryanair Group	2,619	+1%	▲ +7%	▲ +31%
2.	Lufthansa Group	2,338	-0%	▼ -1%	▼ -21%
3.	IAG Group	2,129	+0%	▲ +0%	▲ +4%
4.	Air France-KLM Group	1,786	+3%	▲ +4%	▼ -2%
5.	easyJet Group	1,571	+13%	▲ +4%	▲ +6%
6.	Turkish Airlines Group	1,508	+1%	▲ +10%	▲ +27%

- 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 higher number of flights (+2.3%) compared to the previous week.
- All six except Lufthansa Group increased capacity compared to the previous week, ranging from +0% for IAG Group to +13% for easyJet Group.
- Compared to 2024, all Groups recorded more flights, with Turkish Airlines Group posting a double-digit increase (+10%), followed by Ryanair Group (+7%), Air France-KLM Group (+4%) and easyJet Group (+4%).
- Compared to 2019, four Groups (Ryanair, Turkish Airlines, easyJet and IAG) operated more flights than in 2019 (+31%, +27%, +6%, +4% respectively). Two Groups operated fewer flights (Lufthansa -21% and Air France-KLM -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	9,794	+0%	+6%	+0%
2.	Low Cost	9,021	+4%	+6%	+21%
3.	Regional	3,413	-1%	-1%	-15%
4.	Business	1,829	+7%	+2%	+15%
5.	All-cargo	1,099	-1%	-2%	+15%
6.	Other	984	+13%	+33%	-11%
7.	Non-Scheduled	527	+11%	+3%	+1%
8.	Military	522	+6%	+6%	-23%

- 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 4pp compared to 2019. The Regional market share has shrunk by 3pp to 12%, while All-cargo (3%) is stable.
- Over the previous week, two market segments – Regional and All-cargo – each recorded negative growth of -1%. All other market segments recorded more flights: Other (+13%), Non-scheduled (+11%), Business (+7%), Military (+6%), Low-cost (+4%) and Mainline (+0%).
- Low-cost (+21%), Business (+15%), All-cargo (+15%), Non-scheduled (+1%) and Mainline (+0%) recorded flights above 2019 levels while Military (-23%), Regional (-15%) and Other (-11%) recorded double-digit decreases.

Busiest 10 airports

Week 08-14 Dec 2025 (avg daily flights)

No.	Airport	Avg. daily dep/arr flights	% prev week	% prev year	% 2019
1.	Istanbul	1,444	-0%	+6%	+32%
2.	London Heathrow	1,308	-0%	+1%	+1%
3.	Paris Charles de Gaulle	1,285	+3%	+3%	+2%
4.	Amsterdam	1,260	+2%	-1%	-2%
5.	Madrid Barajas	1,196	+1%	+3%	+6%
6.	Frankfurt	1,184	-0%	+3%	-8%
7.	Barcelona	881	+1%	+4%	+10%
8.	Munich	821	+1%	-1%	-23%
9.	Rome Fiumicino	778	+3%	+1%	+11%
10.	Istanbul Sabiha Gokcen	751	+1%	+13%	+28%

See top 40 airports

- The busiest 10 airports, in aggregate, recorded 1.0% more flights compared to the previous week.
- All but three airports (Istanbul, London Heathrow and Frankfurt) increased in capacity compared to the previous week.
- The main increases compared to the previous week were observed for:
  - Paris CDG (+3%): increases mainly on the flows France ↔ Italy, France domestic and France ↔ Spain and for Air France Group and easyJet Group.
  - Rome Fiumicino (+3%): increases mainly on the flows France ↔ Italy and Italy domestic and for Wizz Air by far, but also easyJet Group and Ryanair Group.
  - Amsterdam (+2%): increases mainly on one flow Netherlands ↔ UK and for KLM Group and easyJet Group.
- Compared to 2024, all but two of the busiest 10 airports (Amsterdam and Munich) saw more flights, notably Istanbul Sabiha Gökcen (+13%), Istanbul (+6%) and Barcelona (+4%).
- Compared to 2019, seven of the busiest 10 airports (Istanbul, Istanbul Sabiha Gökcen, Rome Fiumicino, Barcelona, Madrid, Paris CDG and London Heathrow) handled more flights than in 2019 with particularly strong growth at the first two airports (+32% and +28% respectively).

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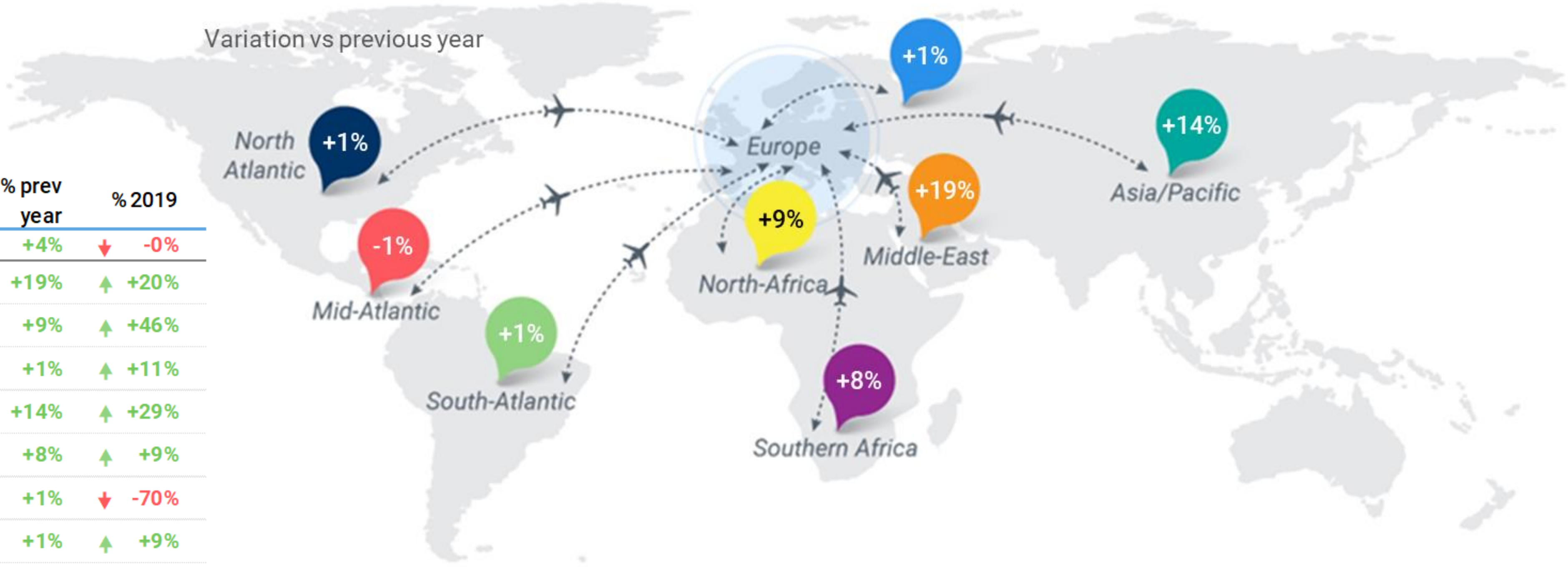
Traffic flows

(average daily departure/arrival flights for week 08-14 Dec 2025)

Region	Average daily flights	% prev week	% prev year	% 2019
Intra-Europe	20,232	+3%	+4%	-0%
Europe ↔ Middle-East	1,595	+3%	+19%	+20%
Europe ↔ North-Africa	1,294	+2%	+9%	+46%
Europe ↔ North Atlantic	1,122	-1%	+1%	+11%
Europe ↔ Asia/Pacific	1,029	+1%	+14%	+29%
Europe ↔ Southern Africa	362	+2%	+8%	+9%
Europe ↔ Other Europe	232	-1%	+1%	-70%
Europe ↔ South-Atlantic	205	-0%	+1%	+9%
Europe ↔ Mid-Atlantic	194	+4%	-1%	+3%
Non Intra-Europe	6,033	+1%	+10%	+10%



- Intra-European traffic saw 20,232 daily flights on average last week, +3% vs the previous week. Intercontinental flows amounted to 6,033 daily flights on average, +1% vs the previous week.
- The top intercontinental flows were between Europe and the Middle East, followed by to/from North Africa, North Atlantic and Asia/Pacific.
- The highest increases compared to the previous week were recorded for Mid-Atlantic (+4%) and Middle-East (+3%).
- All intercontinental flows except with 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 08-14 Dec 2025

No.	Country pair	Average daily flights	% prev week	% prev year	% 2019
1.	UK ↔ US	265	-0%	-3%	-6%
2.	Germany ↔ US	145	+0%	-3%	-7%
3.	France ↔ US	102	+2%	+0%	+3%
4.	UAE ↔ UK	72	-4%	+7%	+7%
5.	Netherlands ↔ US	66	-2%	-1%	-0%
6.	Ireland ↔ US	65	-5%	+27%	+41%
7.	Spain ↔ US	61	-2%	+12%	+16%
8.	Germany ↔ UAE	54	-1%	+14%	+25%
9.	Egypt ↔ Russia	54	-3%	+39%	
10.	Italy ↔ US	50	-2%	+11%	

- 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, Germany ↔ UAE and Egypt ↔ Russia (i.e. overflying the network).
- Compared to the previous week, eight long-haul flows posted decreases, notably Ireland ↔ US (-5%), UAE ↔ UK (-4%) and Egypt ↔ Russia (-3%). Two flows saw a slight increase, France ↔ US (+2%) and Germany ↔ US (+0%).
- Compared to 2024, all but three of the top 10 long-haul flows recorded a positive growth rate, most notably Egypt ↔ Russia (+39%), Ireland ↔ US (+27%), Germany ↔ UAE (+14%), Spain ↔ US (+12%) and Italy ↔ US (+11%). However, the top two flows, UK ↔ US and Germany ↔ US were both down by -3%.
- Seven of the top 10 long-haul flows are currently above 2019 levels, notably Ireland ↔ US (+41%), Germany ↔ UAE (+25%) and Spain ↔ US (+16%). In contrast, the two largest flows, UK ↔ US and Germany ↔ US remain below 2019 at -6% and -7% respectively.

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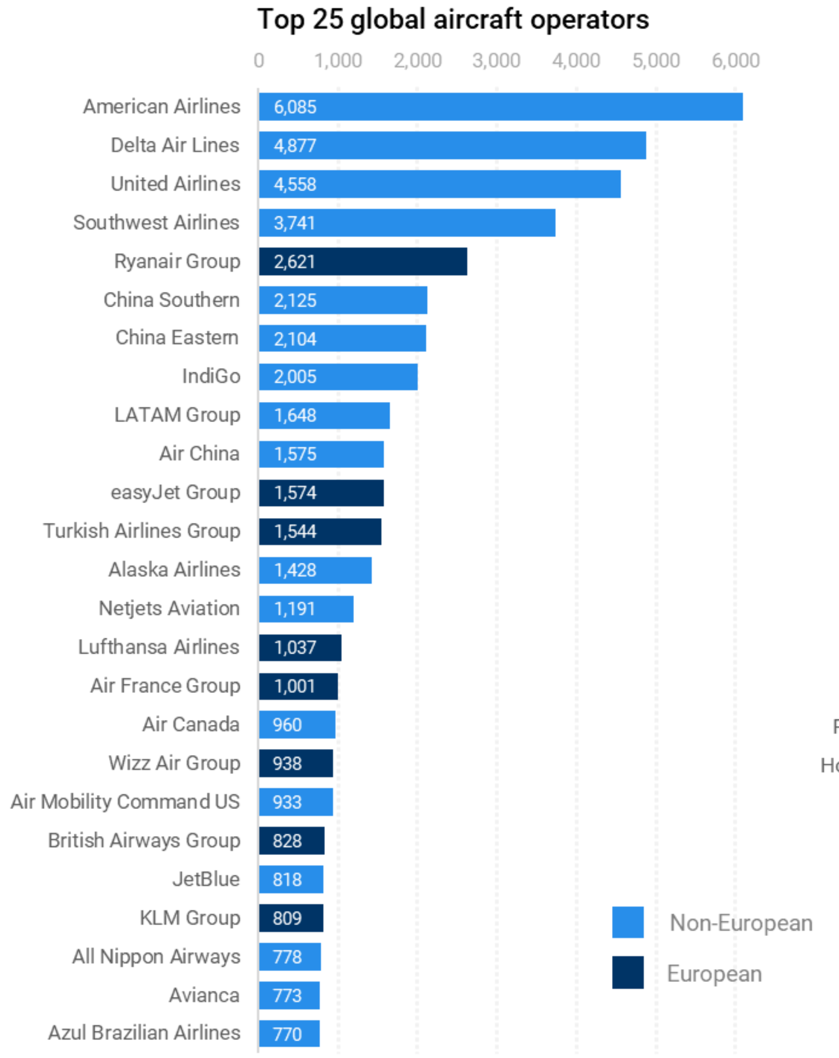
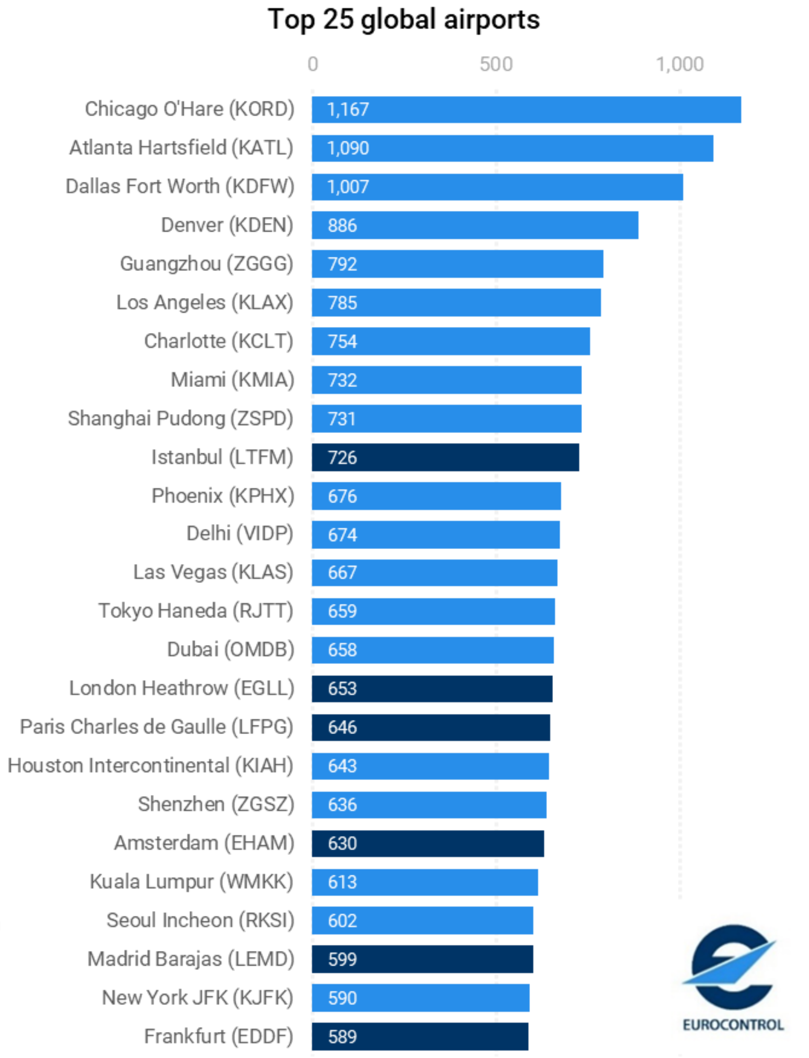
Top 25 global aircraft operators and airport departures

(average daily departure flights) **(Week 09-15 Dec 2025)**





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Source: Flightradar24 Historical Global Utilisation data

- Aircraft operators: Over the last week, eight 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).
- Seven more European carriers made the top 25, starting with easyJet Group (11th), Turkish Airlines Group (12th), Lufthansa Airlines (15th), Air France Group (16th), Wizz Air Group (18th), British Airways Group (20th) and KLM Group (22nd).
- Airports: Over the last week, six 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 10, followed by London Heathrow (16th), Paris CDG (17th), Amsterdam (20th), Madrid (23rd) and Frankfurt (25th).
- The top 10 global airports continued to be dominated by the US with 7/10 being American. China is a distant second with 2 airports.

Jet fuel price (Europe)

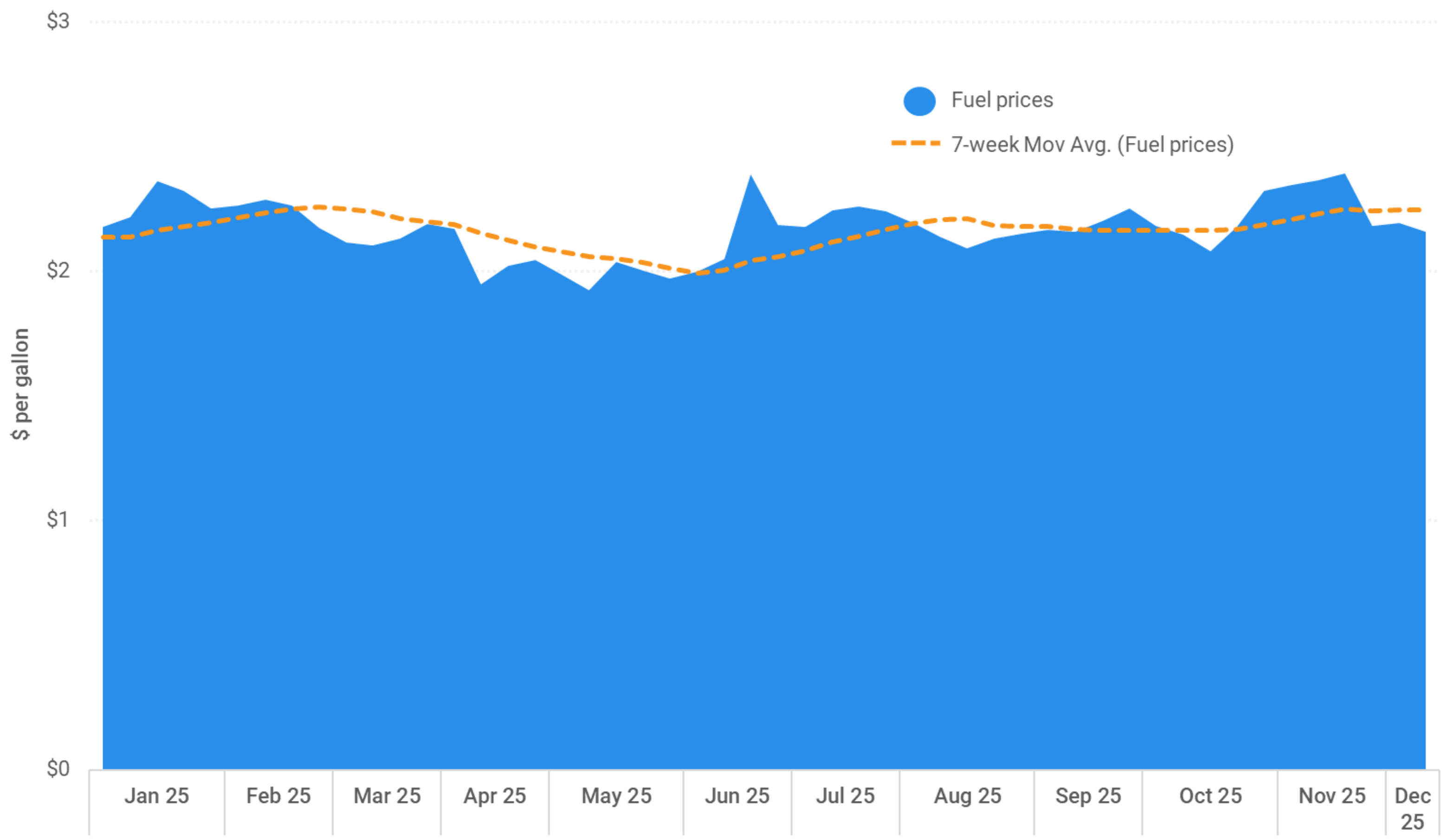
Week 08-14 Dec 2025

12 Dec 2025
avg fuel price:

$2.16 /gallon

-1%
vs. $2.18 /gallon
on 28 Nov 2025

Source: IATA/Platts

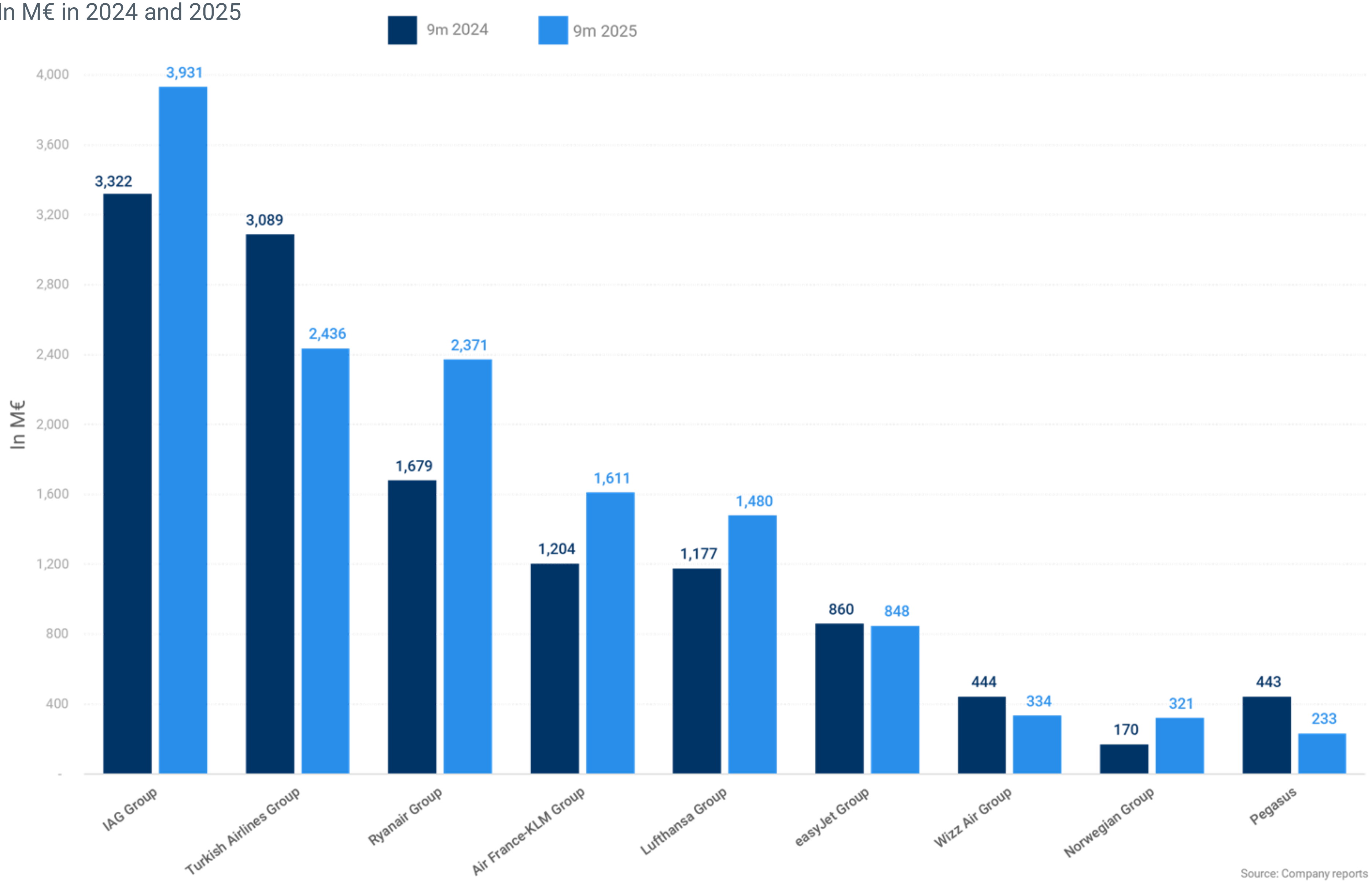


Source: IATA/Platts

- The average price of jet fuel closed at 2.16USD/gallon on 12 December 2025, 1% 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.

Operating profits of airlines

In M€ in 2024 and 2025

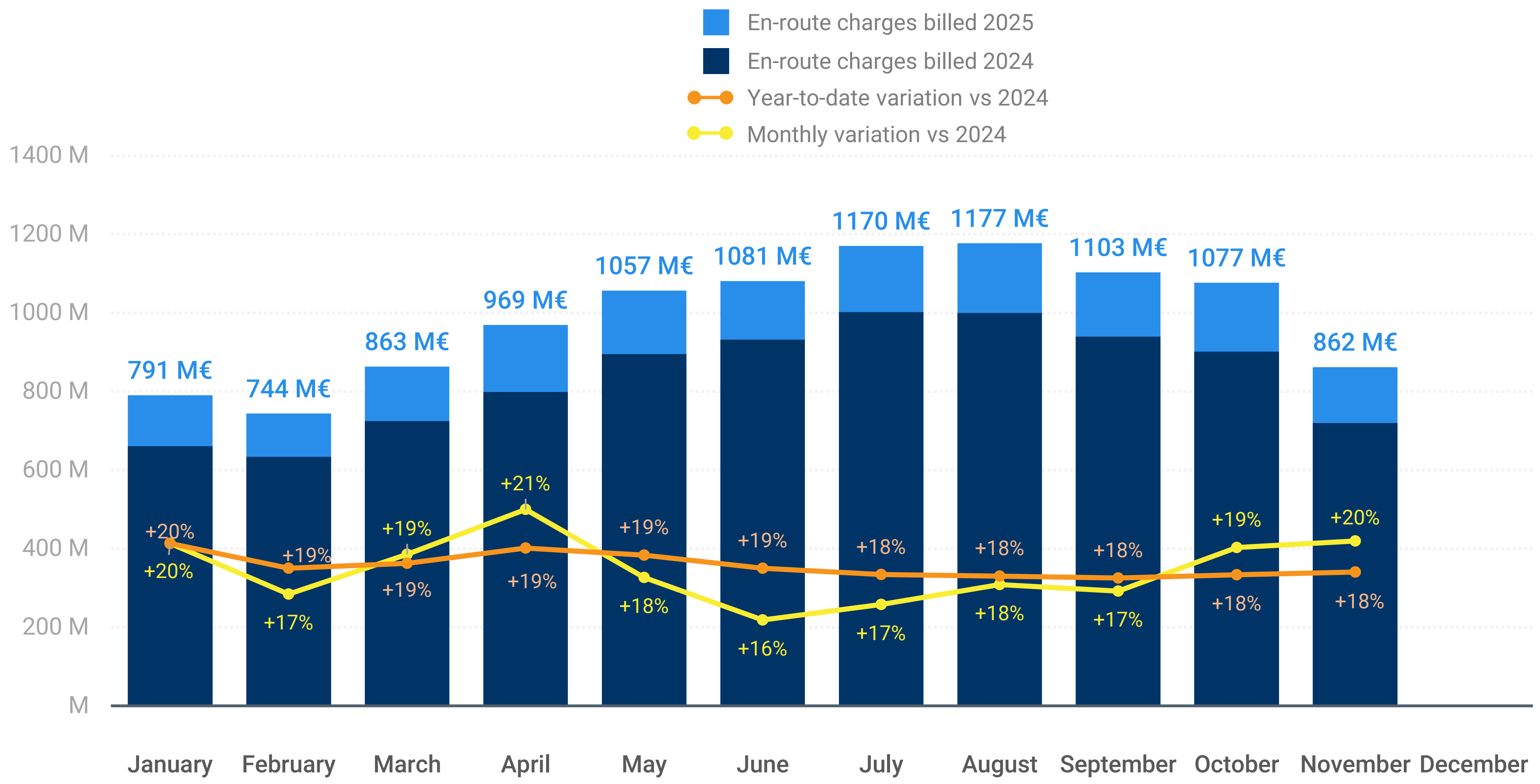


Source: Company reports

- Across the top 9 airlines/airline groups, all reported positive operating results for the first nine months of 2025.
- Five of the airlines/airline groups in this sample improved their operating profits compared to the previous period (9M 2024): IAG Group, Ryanair Group Air France-KLM Group, Lufthansa Group and Norwegian Group.
- IAG Group delivered the highest operating profit (3,931 M€) supported by strong premium travel demand on North Atlantic and South Atlantic routes, which offset slight declines in short-haul leisure routes.
- Turkish Airlines Group recorded the second highest operating profit (2,436 M€) although this represented a 21% decrease compared to the same period in 2024.
- Overall, the airlines in this sample generated 13.6 Bn€ in operating profit during the first nine month of 2025, a 9.5% increase on the same period in 2024 (12.4 Bn€).

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

Year-to-date amount billed: 10,894 M€ (+18% vs 2024)



- At network level, 862 M€ in en-route air navigation charges was billed in November 2025, +20% vs 2024 and +56% 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 20% year-on-year increase in charges in November 2025 reflects a 11% increase in Unit Rates and a 7.6% increase in total en-route Service Units vs November 2024. The average distance per flight has increased by 2.7%, while the average maximum take-off weight per flight has increased by 0.7%.
- On a year-to-date basis, EUROCONTROL has billed 10,894 M€ in route charges, 18% higher than in 2024 and 49% 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.

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