

**FRANCE AVIATION
CIVILE SERVICES**



AIR TRANSPORT

DATA BULLETIN



OCTOBER 2025

**MAIN TRAFFIC
FLOWS
EUROPE-WORLD
IN 2024**

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FIRST QUARTER 2025 RESULTS AND MAIN AIRLINES FLEETS

In this quarterly publication, you will find facts and figures about the civil aviation industry based on data extracted from our air transport databases.

This quarter, you will find:

- Main airlines Q2 2025 traffic results with 2025/2024 comparison
- Top 50 airports by number of passengers carried in Q2 2025
- Main traffic flows 2024 (city-pairs) between Europe and the rest of the World by regions
- Airliners Q1 2025 orders and deliveries with 2025/2024 evolution

We wish you a pleasant reading!

Every question or suggestion related to this publication or our services is welcome at:

atd@fracs.aero

If you have missed the last report, please click on the following link :

[First quarter 2025 results and main airlines fleets](#)

Summary

1 - Main Airlines' traffic Q2 2025

2 - Main Airports' traffic Q2 2025

3 - Main traffic flows Europe - World by region

AFRICA &
MIDDLE EAST

ASIA &
PACIFIC

EUROPE

NORTH
AMERICA

LATIN AMERICA
& CARIBBEAN

5 - Airliners' Orders and Deliveries Q2 2025

6 - Our Databases and Services



4 MAIN AIRLINES' TRAFFIC - Q2 2025

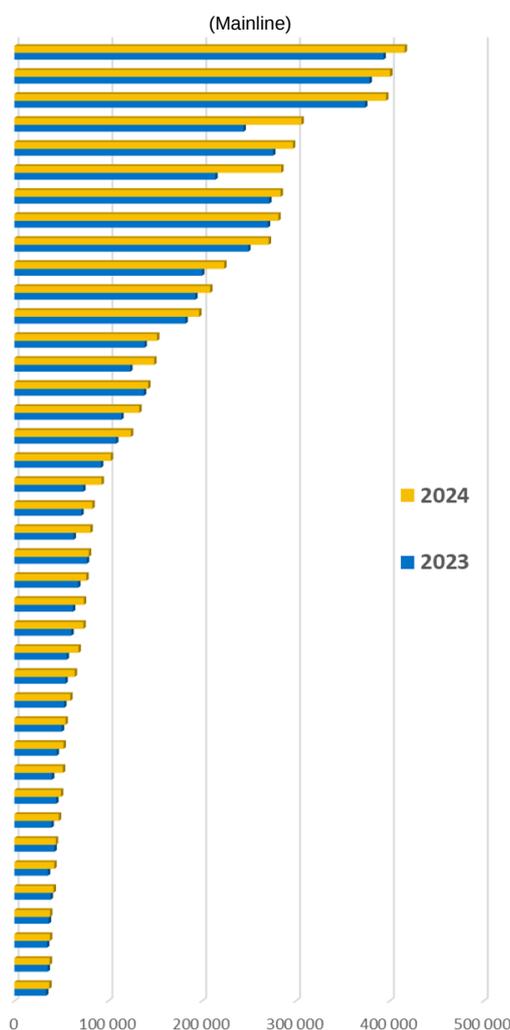
In the second quarter of 2025, global air traffic continued to grow, driven largely by the Asian market. Airlines in the region maintained their strong recovery, with increases exceeding +25%; carriers such as China Southern and Air India have now surpassed their pre-COVID performance levels.

In North America, the trend has stabilized despite a decline in domestic traffic. Alaska Airlines benefited from the integration of Hawaiian Airlines, which boosted its overall figures. Conversely, Spirit Airlines faced bankruptcy, forcing the company to cancel contracts and reduce operations.

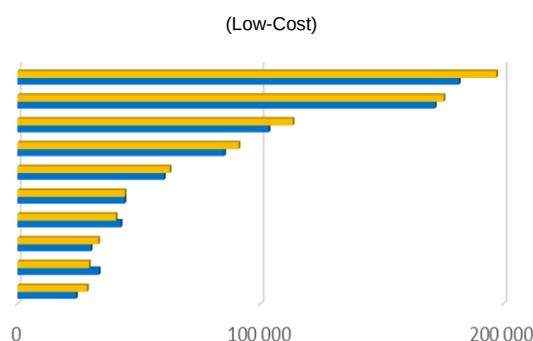
Rank 2024	AIRLINES	RPK ¹ (millions) 2024	RPK ¹ (millions) 2023	24/23 (%)	Q1 25/24 (%)	Q2 25/24 (%)	July 25/24 (%)	August 25/24 (%)
1	UNITED HOLDING	416 019	393 379	5,8	3,6	4,5	-	-
2	AMERICAN AL GROUP	400 396	378 568	5,8	-1,9	0,9	-	-
3	DELTA AIR LINES GROUP	396 131	373 755	6,0	2,7	1,8	-	-
4	CHINA SOUTHERN AIR HOLD.	305 976	244 226	25,3	7,9	9,1	7,3	-
5	INTL AL GROUP (IAG)	296 877	275 727	7,7	2,6	0,7	-	-
6	AIR CHINA GROUP	284 332	214 174	32,8	3,5	7,0	2,3	3,2
7	EMIRATES AL	283,731*	271 601	4,5	-	-	-	-
8	AIR FRANCE/KLM	281 381	270 135	4,2	3,4	4,3	-	-
9	LUFTHANSA GROUP	271 038	249 157	8,8	3,3	3,5	-	-
10	QATAR AW	223 696	200 088	11,8	0,5	-	-	-
11	TURKISH AL/THY	208 663	192 828	8,2	4,5	8,2	9,1	9,6
12	CHINA EASTERN AL	196 958	182 295	8,0	10,9	13,6	9,4	8,7
13	SINGAPORE INT'L GROUP	152 101	138 760	9,6	2,8	4,1	6,2	5,4
14	AEROFLOT RUSSIAN GROUP	149 074	123 421	20,8	2,2	4,9	1,0	1,9
15	AIR CANADA GROUP	142 657	138 085	3,3	-3,1	1,5	-	-
16	LATAM AL GROUP	133 137	113 993	16,8	5,7	9,9	10,4	10,8
17	QANTAS GROUP	124 243	108 360	14,7	-	-	-	-
18	ALASKA AIR GROUP	102 790	92 313	11,3	37,8	31,8	-	-
19	CATHAY PACIFIC	93 016	73 340	26,8	26,0	34,0	30,3	34,6
20	SAUDIA	83 164	71 324	16,6	-	-	-	-
21	ETIHAD AW	81 058	63 129	28,4	-	-	-	-
22	ALL NIPPON AW GROUP	79 371	77 252	2,7	6,0	8,9	6,3	9,4
23	KOREAN AIR/KAL	76 666	68 054	12,7	4,3	-0,3	-	-
24	JAPAN AL	74 002	62 452	18,5	15,3	12,5	8,9	9,5
25	AIR INDIA	73 588	60 714	21,2	39,0	22,8	3,3	-
26	HAINAN AL	68 400	55 753	22,7	-	-	-	-
27	SICHUAN AL	64 307	54 368	18,3	-	-	-	-
28	ETHIOPIAN AL	59 492	53 088	12,1	-	-	-	-
29	EVA AIR	54 478	50 620	7,6	-	-	-	-
30	AVIANCA HOLD.	52 419	45 070	16,3	6,8	10,2	8,5	6,4
31	THAI AW	51 740	40 083	29,1	20,8	15,6	5,6	4,3
32	AEROMEXICO GROUP	49 645	44 624	11,3	-1,3	1,4	0,4	-
33	JUNEYAO AIR	47 397	39 533	19,9	5,0	5,1	8,8	5,7
34	TAP AIR PORTUGAL	44 135	42 667	3,4	-1,1	-	-	-
35	ASIANA	42 607	35 777	19,1	8,3	1,2	-	-
36	COPA AL	41 788	38 706	8,0	10,0	6,4	7,8	9,8
37	TUI AW	38 026	36 670	3,7	1,9	27,5	4,0	-
38	VIRGIN ATLANTIC	37 921	34 748	9,1	7,7	1,9	2,7	-
39	AZUL LINHAS AEREAS	37 718	35 400	6,5	19,4	19,2	12,6	12,9
40	CHINA AL	37 267	33 808	10,2	-0,8	0,6	1,9	1,5

*Fiscal Year

Top Airlines by PKT - 2024/23



Top Airlines by PAX - 2024/23



Rank 2024	AIRLINES (low-cost)	PAX ² (000 ¹) 2024	PAX ² (000 ¹) 2023	24/23 (%)	Q1 25/24 (%)	Q2 25/24 (%)	July 25/24 (%)	August 25/24 (%)
1	RYANAIR	197 100	181 740	8,5	11,1	4,1	2,5	2,4
2	SOUTHWEST AL	175 469	171 817	2,1	-9,2	-6,1	1,9	-
3	INDIGO AL	113 367	103 405	9,6	18,9	11,6	4,9	-
4	EASYJET AL	91 077	85 115	7,0	8,3	2,2	-	-
5	WIZZ AIR	62 686	60 314	3,9	5,1	10,6	6,8	-
6	SPIRIT AL	44 180	44 105	0,2	-19,0	-18,9	-28,7	-
7	JETBLUE AW	40 526	42 535	-4,7	-3,3	-3,9	-0,7	-
8	FRONTIER AL	33 296	30 218	10,2	12,2	-4,2	-	-
9	VOLARIS	29 473	33 497	-12,0	7,2	6,3	2,9	1,1
10	SPRING AL	28 680	24 133	18,8	5,7	13,3	9,3	13,5

¹ Revenue Passenger-Kilometers

² Revenue Passengers carried

Sources : FRACS Air transport data



5 MAIN AIRPORTS' TRAFFIC - Q2 2025

In the second quarter of 2025, traffic at Asian airports continued to grow compared with the previous year. Hong Kong stands out in particular, posting a +17.7% increase over Q2 2024 — a trend that has extended into the summer months. Delhi, by contrast, is an exception: its traffic remains below 2024 levels but still above the 2019 baseline. This slight decline is mainly attributed to ongoing regional geopolitical tensions.

Conversely, North American airports experienced a slight slowdown. Eight of the sixteen airports in the ranking reported lower performance than last year. This trend also persisted through the summer, with a general loss of momentum across most major airports on the continent, largely due to a decline in U.S. domestic traffic.

Rank 2024	Rank Var.	Code IATA	AIRPORT	REGION	PAX (000) 2024	24/19 (%)	24/23 (%)	Q1 25/24 (%)	Q2 25/24 (%)	July 25/24 (%)	August 25/24 (%)
1	0	ATL	ATLANTA, GEORGIA, USA	NORTH AMERICA	108 068	-2,2	3,3	-1,3	-2,9	6,5	-2,1
2	0	DXB	DUBAI, U. A. EMIRATES	AFRICA & MIDDLE EAST	92 300	6,8	6,1	1,5	3,1	-1,1	3,8
3	0	DFW	DALLAS/FT. WORTH, TEXAS-LOVE, USA	NORTH AMERICA	87 818	17,0	7,4	0,0	-1,8	-3,0	-4,5
4	1	HND	TOKYO-HANEDA, JAPAN	ASIA PACIFIC	84 967	-0,6	8,5	10,7	8,8	4,2	9,1
5	-1	LHR	LONDON-HEATHROW, ENGLAND UK	EUROPE	83 860	3,7	5,9	-1,5	1,6	0,0	0,8
6	0	DEN	DENVER, COLORADO, USA	NORTH AMERICA	82 359	19,3	5,8	-0,4	-1,9	1,5	1,4
7	0	IST	ISTANBUL, TURKEY	EUROPE	80 456	54,8	5,8	1,6	3,2	4,2	7,4
8	1	ORD	CHICAGO, ILLINOIS-O'HARE, USA	NORTH AMERICA	79 988	-5,2	8,2	4,5	7,4	7,8	-
9	1	DEL	DELHI, INDIA	ASIA PACIFIC	77 821	13,6	7,8	7,5	-1,2	-8,9	-7,3
10	11	PVG	SHANGHAI-PUDONG, P. R. CHINA	ASIA PACIFIC	76 790	0,8	41,0	11,2	12,0	5,6	6,9
11	-3	LAX	LOS ANGELES, CALIFORNIA-INTL, USA	NORTH AMERICA	76 586	-13,1	2,0	-4,6	-2,7	-1,9	-4,2
12	0	CAN	GUANGZHOU-BAIYUN, P. R. CHINA	ASIA PACIFIC	76 365	4,0	20,9	2,3	17,1	6,3	4,3
13	7	ICN	SEOUL-INCHEON, REPUBLIC OF KOREA	ASIA PACIFIC	71 157	0,0	26,8	7,9	10,8	1,6	-
14	-3	CDG	PARIS-DE GAULLE, FRANCE	EUROPE	70 290	-7,7	4,3	5,6	9,7	2,6	1,0
15	2	SIN	SINGAPORE, SINGAPORE	ASIA PACIFIC	67 700	-1,0	14,9	4,3	5,9	4,7	3,1
16	7	PEK	BEIJING-CAPITAL, P. R. CHINA	ASIA PACIFIC	67 367	-32,6	27,4	2,0	6,9	3,2	1,8
17	-3	AMS	AMSTERDAM, NETHERLANDS	EUROPE	66 828	-6,8	8,0	3,0	3,1	4,0	3,2
18	-3	MAD	MADRID, BARAJAS, SPAIN	EUROPE	66 159	7,1	9,9	4,8	2,2	0,6	2,8
19	-6	JFK	NEW YORK, NEW YORK-KENNEDY, USA	NORTH AMERICA	63 521	1,4	1,7	-1,3	-0,2	-0,7	1,9
20	6	BKK	BANGKOK-NEW SUVANNABHU, THAILAND	ASIA PACIFIC	62 235	-4,9	20,4	5,6	-0,5	-2,7	-3,5
21	-5	FRA	FRANKFURT, GERMANY	EUROPE	61 561	-12,7	3,7	-0,9	3,1	1,6	4,1
22	2	SZX	SHENZHEN-BAO'AN, P. R. CHINA	ASIA PACIFIC	61 477	16,1	16,6	6,3	16,0	2,0	4,1
23	-1	CLT	CHARLOTTE, NORTH CAROLINA, USA	NORTH AMERICA	58 812	17,2	10,0	-7,7	-9,4	-6,1	-8,6
24	-5	LAS	LAS VEGAS, NEVADA-MCCARRAN, USA	NORTH AMERICA	58 482	13,1	1,4	-3,7	-4,8	-5,7	-
25	-7	MCO	ORLANDO, FLORIDA-INTL, USA	NORTH AMERICA	57 212	13,0	-0,9	-4,0	-1,4	1,9	4,5
26	10	KUL	KUALA LUMPUR, MALAYSIA	ASIA PACIFIC	57 106	-7,9	20,9	8,5	8,7	8,7	7,7
27	-2	MIA	MIAMI, FLORIDA, USA	NORTH AMERICA	55 927	19,9	6,9	-1,7	5,5	-1,8	-0,9
28	3	BCN	BARCELONA, SPAIN	EUROPE	55 003	4,1	10,3	4,3	5,8	2,9	4,8
29	11	TFU	CHENGDU-TIANFU, P. R. CHINA	ASIA PACIFIC	54 906	-	22,6	2,0	4,2	5,0	4,1
30	-3	BOM	MUMBAI, INDIA	ASIA PACIFIC	54 821	16,5	6,3	2,2	1,2	0,8	1,4
31	2	CGK	JAKARTA-SOEKARNO-HATTA, INDONESIA	ASIA PACIFIC	54 766	0,5	8,1	8,2	-0,4	1,7	-
32	24	HKG	HONG KONG, HONG KONG	ASIA PACIFIC	52 964	-25,7	34,4	14,8	17,7	9,3	15,5
33	4	DOH	DOHA, QATAR	AFRICA & MIDDLE EAST	52 700	35,9	14,8	-1,4	0,5	1,4	6,4
34	-5	SEA	SEATTLE/TACOMA, WASHINGTON, USA	NORTH AMERICA	52 638	1,6	3,4	2,0	1,4	1,2	0,4
35	-1	PHX	PHOENIX, ARIZONA-SKY HARBOR INTL, USA	NORTH AMERICA	52 325	13,0	7,5	-0,6	-0,8	-1,6	-2,9
36	-6	SFO	SAN FRANCISCO, CALIFORNIA, USA	NORTH AMERICA	52 211	-8,9	4,1	6,1	8,8	5,6	-0,9
37	2	MNL	MANILA, PHILIPPINES	ASIA PACIFIC	50 356	4,7	11,2	7,4	6,5	-3,2	-
38	17	PKX	BEIJING DAXING, P. R. CHINA	ASIA PACIFIC	49 441	-	25,5	-	-	-	-
39	5	JED	JEDDAH, SAUDIA ARABIA	AFRICA & MIDDLE EAST	49 072	30,8	14,4	-	0,8	13,5	10,9
40	12	FCO	ROME-DA VINCI, ITALY	EUROPE	48 879	12,3	20,7	5,7	11,9	0,1	0,8
41	-9	EWV	NEW YORK, NEW YORK-NEWARK INTL, USA	NORTH AMERICA	48 854	5,7	-0,5	-0,7	-12,6	-4,7	-
42	-1	CKG	CHONGQING-JIANGBEI, P. R. CHINA	ASIA PACIFIC	48 677	8,7	9,0	3,7	4,1	1,2	1,7
43	-5	IAH	HOUSTON, TEXAS-INTERCONT, USA	NORTH AMERICA	48 449	7,7	4,9	0,4	-2,0	4,0	-3,0
44	9	HGH	HANGZHOU, P. R. CHINA	ASIA PACIFIC	48 054	19,8	16,7	2,1	17,2	1,8	-
45	0	SHA	SHANGHAI-HONGQIAO, P. R. CHINA	ASIA PACIFIC	47 944	5,0	12,8	2,2	7,3	3,5	2,2
46	0	KMG	KUNMING-WUJIABA, P. R. CHINA	ASIA PACIFIC	47 178	-1,9	12,2	2,0	6,1	9,3	5,7
47	0	XIY	XI AN-XIANYANG, P. R. CHINA	ASIA PACIFIC	47 030	-0,4	13,7	-	-	-	-
48	-5	YYZ	TORONTO, ONTARIO-PEARSON, CANADA	NORTH AMERICA	46 622	-7,3	4,2	-1,9	2,5	2,9	-2,6
49	5	BOG	BOGOTA, COLOMBIA	LATIN AMERICA & CARIBBEAN	45 798	32,2	16,0	-1,3	-1,2	2,1	-1,5
50	-15	MEX	MEXICO CITY, MEXICO	LATIN AMERICA & CARIBBEAN	45 359	-9,8	-6,2	-3,6	-2,4	-2,4	-1,6

6 MAIN TRAFFIC FLOWS EUROPE -WORLD BY REGION IN 2024

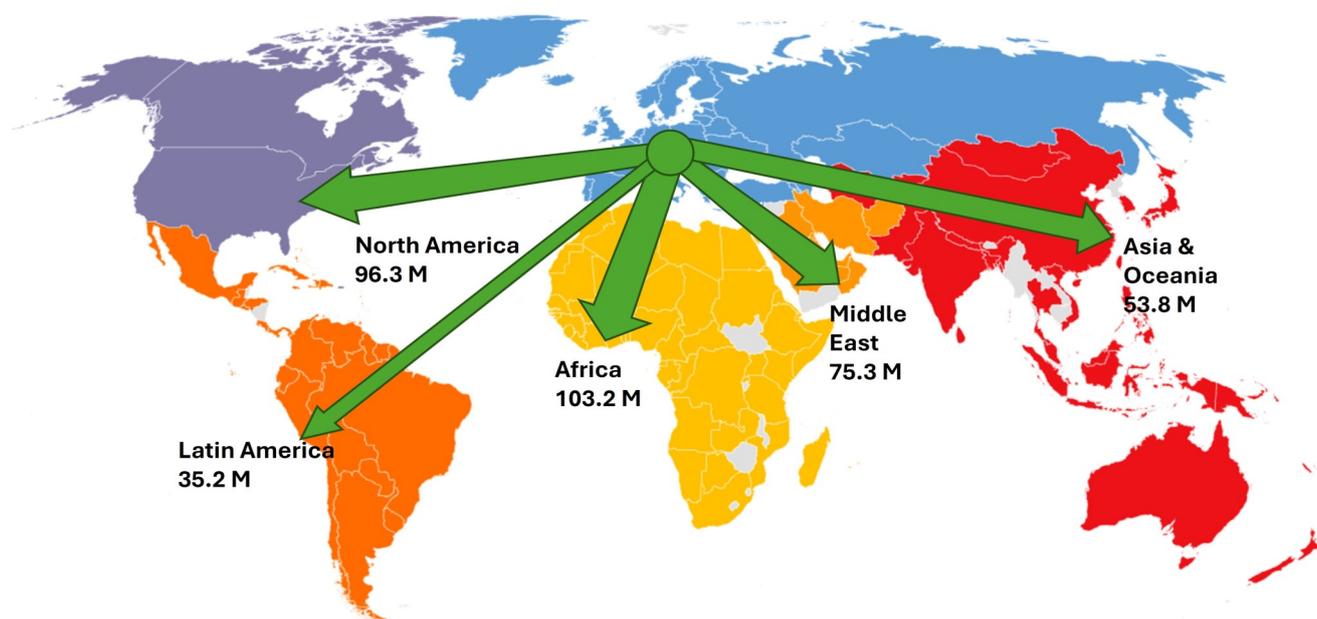
This is the distribution of air passenger traffic between Europe* and the rest of the world in 2024 by region.

These numbers are a total of passengers in both directions (e.g. Africa = from Europe to Africa + from Africa to Europe) based on nearly 5,200 airports-pair results.

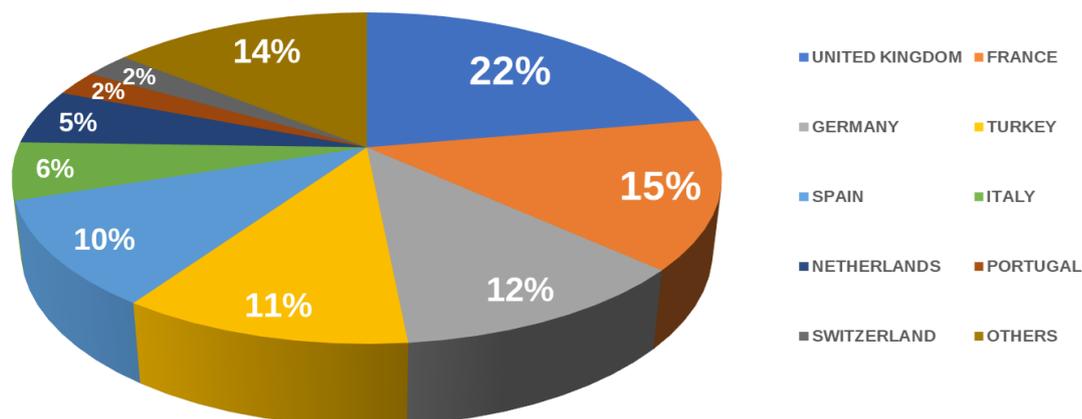
Local passengers only: Passengers joining or leaving an aircraft at the reporting airport, even if they are continuing their journey on another aircraft carrying the same flight number.

	PAX 2024	% 24/23	% 24/19
Africa	103 221 561	12,0	22,5
North America	96 271 194	6,9	3,3
Middle East	75 341 694	-1,7	-1,9
Asia & Oceania	53 804 687	27,5	-4,1
Latin America	35 179 786	8,4	10,0
Total*	363 818 922	9,1	6,3

*Russian data is not complete



Europe intercontinental traffic distribution 2024



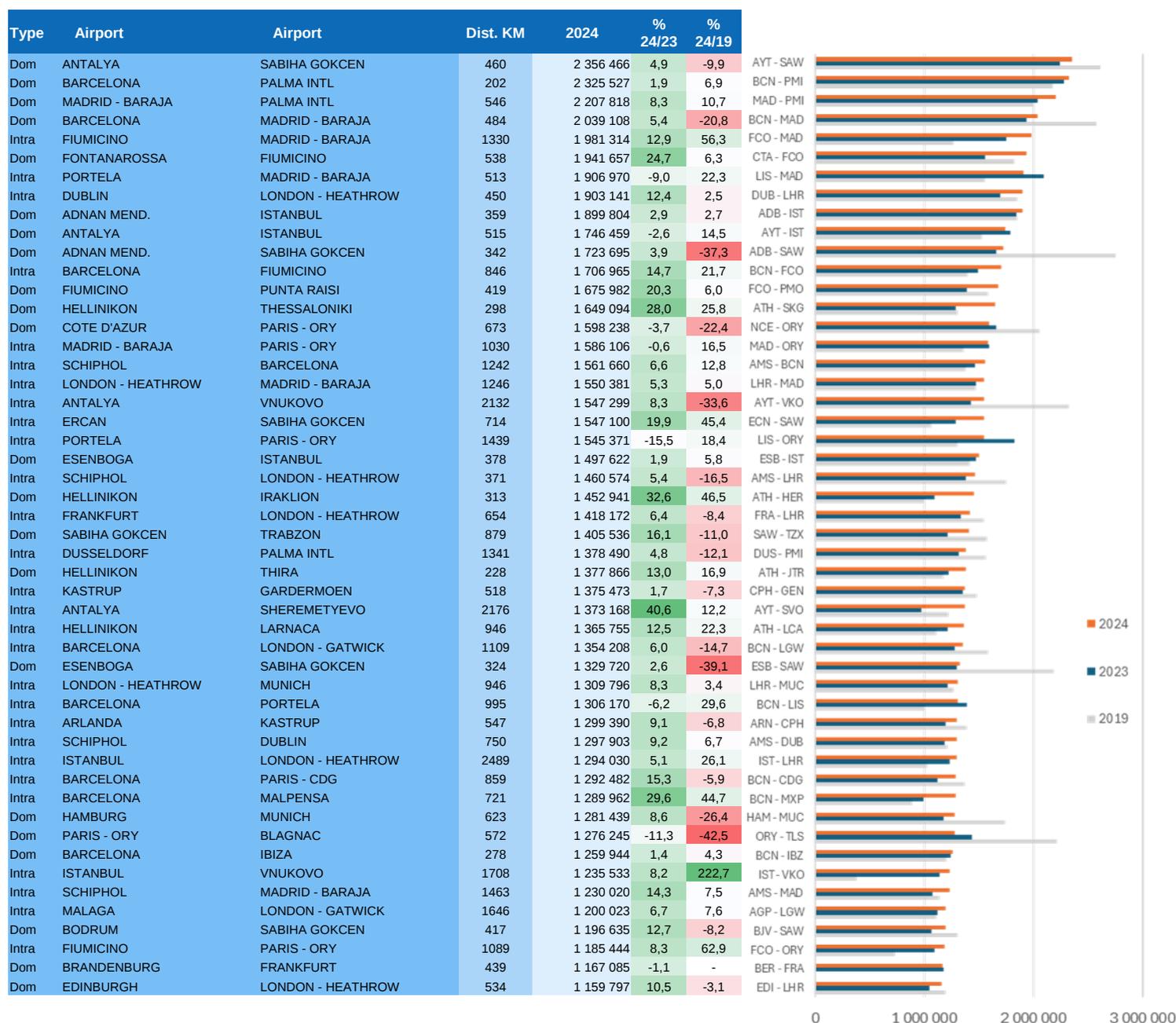
Sources : FRACS Air transport database



7 EUROPE

In 2024, European traffic continued to strengthen, driven by dynamic intra-regional connections, despite a decline in domestic traffic — particularly in Northern Europe. The Turkish route Antalya – Sabiha Gökçen ranked first with 2.36 million passengers (+4.9% vs 2023, still –9.9% vs 2019). Spain maintained its strong momentum: Barcelona – Palma (2.33 million; +1.9%; +6.9% vs 2019) remained in second place, while Madrid – Palma (2.21 million; +8.3%) completed the podium.

The highest-ranking intra-European connection, Rome-Fiumicino – Madrid-Barajas, reached fifth place with 1.98 million passengers (+12.9%; +56.3% vs 2019), highlighting the strong resurgence of flows between major hubs. Conversely, Porto – Paris-Orly declined by –15.5%, marking one of the few contractions within the regional top routes.



Sources : FRACS Air transport data, ACI

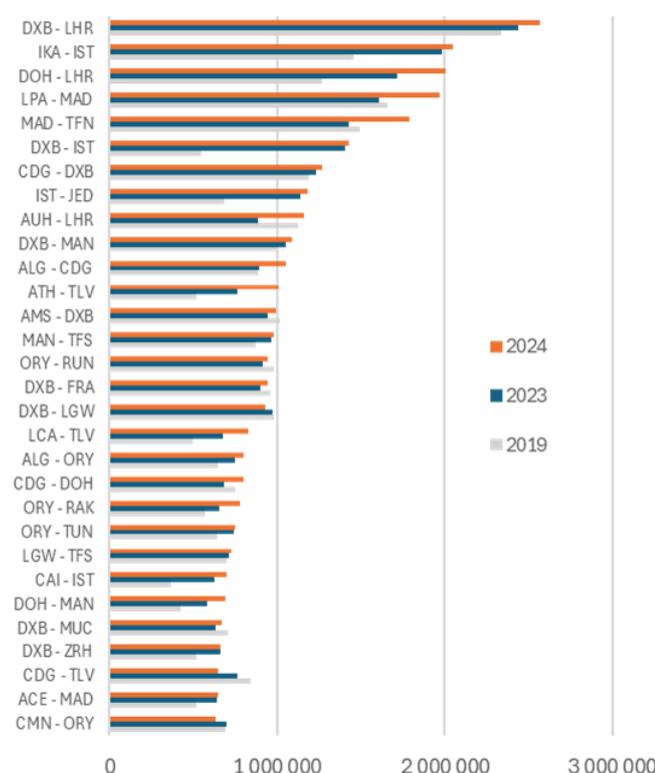


8 AFRICA & MIDDLE EAST

In 2024, air traffic between Europe, Africa, and the Middle East continued to grow, driven by the strength of the region’s major hubs.

The top three routes remain dominated by connections between the Gulf and Western Europe: Dubai – London Heathrow retains first place with 2.56 million passengers (+5.2% vs 2023, +10.0% vs 2019). Tehran – Istanbul (+3.6%) and Doha – London Heathrow (+17.2%) complete the podium, confirming the central role of these gateways in intercontinental flows.

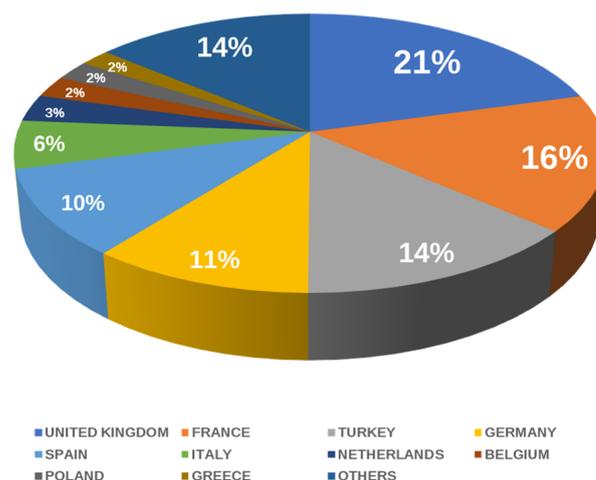
Airport	Airport	Dist. Km	2024	% 24/23	% 24/19
DUBAI	LONDON - HEATHROW	5495	2 566 310	5,2	10,0
IMAM KHOMIENI	ISTANBUL	2052	2 050 112	3,6	41,1
DOHA	LONDON - HEATHROW	5238	2 006 096	17,2	58,6
LAS PALMAS	MADRID - BARAJA	1770	1 970 045	22,8	18,7
MADRID - BARAJA	TENERIFE NORTH	1770	1 785 863	25,1	19,6
DUBAI	ISTANBUL	3025	1 429 317	2,0	161,2
PARIS - CDG	DUBAI	5237	1 268 474	2,8	7,0
ISTANBUL	KING ABDUL AZIZ	2406	1 183 726	3,8	73,7
BATEEN	LONDON - HEATHROW	5494	1 158 338	30,5	3,5
DUBAI	MANCHESTER	5653	1 084 369	3,3	8,1
HOUARI BOUMEDIENNE	PARIS - CDG	1371	1 047 213	17,4	18,8
HELLINIKON	BEN GURION	1209	1 006 877	32,6	94,9
SCHIPHOL	DUBAI	5166	991 087	4,8	-2,2
MANCHESTER	REINA SOFIA	3048	976 980	1,5	12,2
PARIS - ORLY	ROLAND GARROS	9358	945 371	3,3	-3,7
DUBAI	FRANKFURT	4842	940 081	4,9	-2,1
DUBAI	LONDON - GATWICK	5471	925 000	-4,6	-5,6
LARNACA	BEN GURION	341	828 630	22,8	67,2
HOUARI BOUMEDIENNE	PARIS - ORLY	1338	796 133	6,9	23,8
PARIS - CDG	DOHA	4967	795 653	16,7	6,1
PARIS - ORLY	MENARA	2093	773 029	17,8	37,0
PARIS - ORLY	CARTHAGE	1465	743 975	0,8	16,6
LONDON - GATWICK	REINA SOFIA	2912	729 387	2,6	4,5
CAIRO	ISTANBUL	1260	695 689	11,2	91,8
DOHA	MANCHESTER	5407	688 835	18,4	62,5
DUBAI	MUNICH	4560	666 932	5,3	-5,1
DUBAI	ZURICH	4765	660 510	0,3	28,1
PARIS - CDG	BEN GURION	3286	645 697	-15,4	-23,3
LANZAROTE	MADRID - BARAJA	1573	645 396	1,4	25,3
MOHAMMED-V	PARIS - ORLY	1897	633 879	-9,3	-7,8



The Dubai – Istanbul route, which has been steadily expanding since the post-pandemic recovery, recorded another increase (+2.0% vs 2024), while Paris-CDG – Dubai remained stable (+2.8%) but robust over the long term. Several African routes also showed renewed growth, including Algiers – Paris-CDG (+17.4%) and Athens – Tel Aviv (+32.6%), among the strongest increases in the ranking.

Conversely, some routes declined, notably Paris-CDG – Tel Aviv (-15.4%) and Johannesburg – London Heathrow (-14.2%), reflecting both geopolitical tensions and capacity adjustments on certain long-haul markets.

Europe - Middle East & Africa traffic distribution

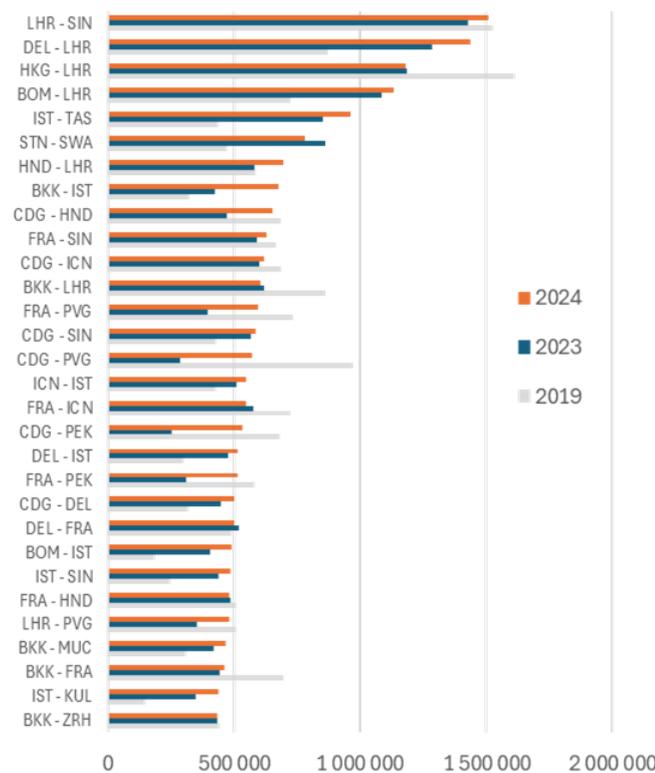


9 ASIA-PACIFIC

In 2024, air traffic between Europe and the Asia-Pacific region continued its recovery, showing sustained growth across most major routes. The London-Heathrow – Singapore connection retained first place with 1.51 million passengers (+5.9% vs 2023), followed by Delhi – London-Heathrow (+12.0%). Hong Kong – London-Heathrow, affected by a slower rebound, remained slightly below last year (-0.4%).

Overall, traffic with the Asia-Pacific region is nearing 2019 levels, though the pace of recovery varies significantly by country.

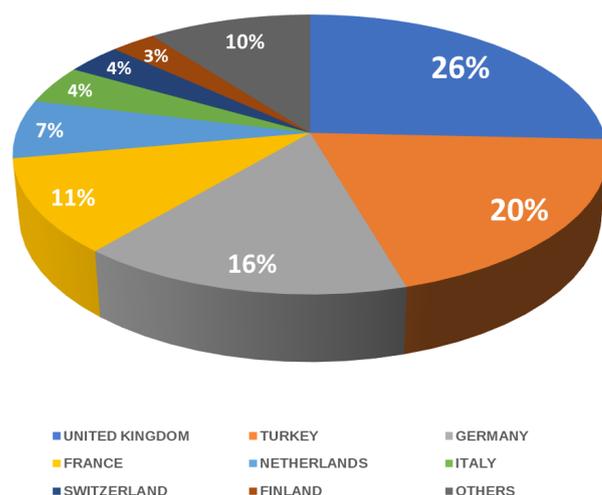
Airport	Airport	Dist. KM	2024	% 24/23	% 24/19
LONDON - HEATHROW	SINGAPORE - CHANGI	10882	1 510 465	5,9	-1,1
INDIRA GANDHI	LONDON - HEATHROW	6731	1 438 046	12,0	65,1
HONG KONG	LONDON - HEATHROW	9645	1 179 445	-0,4	-26,9
JUHU	LONDON - HEATHROW	7213	1 130 348	4,4	56,0
ISTANBUL	TASHKENT	3362	958 721	12,6	119,1
LONDON - STANSTED	SHANTOU	9626	778 970	-9,7	64,8
TOKYO - HANEDA	LONDON - HEATHROW	9591	694 574	19,7	18,5
BANGKOK - SUVARNABHUMI	ISTANBUL	7482	674 461	59,5	109,2
PARIS - CDG	TOKYO - HANEDA	9706	653 683	38,8	-4,7
FRANKFURT	SINGAPORE - CHANGI	10279	629 783	7,0	-5,2
PARIS - CDG	SEOUL - INCHEON	8936	619 407	3,5	-9,9
BANGKOK - SUVARNABHUMI	LONDON - HEATHROW	9547	605 743	-1,8	-29,8
FRANKFURT	SHANGHAI - PUDONG	8858	593 063	50,4	-19,3
PARIS - CDG	SINGAPORE - CHANGI	10724	585 185	3,1	36,1
PARIS - CDG	SHANGHAI - PUDONG	9266	572 000	100,5	-41,1
SEOUL - INCHEON	ISTANBUL	7941	547 416	7,2	28,3
FRANKFURT	SEOUL - INCHEON	8554	544 870	-5,6	-24,4
PARIS - CDG	BEIJING - CAPITAL	8189	534 434	113,0	-21,6
INDIRA GANDHI	ISTANBUL	4565	515 452	8,3	71,7
FRANKFURT	BEIJING - CAPITAL	7787	515 204	66,9	-11,4
PARIS - CDG	INDIRA GANDHI	6566	499 215	11,5	57,6
INDIRA GANDHI	FRANKFURT	6122	497 146	-4,1	1,6
JUHU	ISTANBUL	4833	488 783	20,2	161,8
ISTANBUL	SINGAPORE - CHANGI	8677	483 027	10,4	94,8
FRANKFURT	TOKYO - HANEDA	9361	480 496	-1,0	-5,7
LONDON - HEATHROW	SHANGHAI - PUDONG	9241	478 511	36,3	-6,3
BANGKOK - SUVARNABHUMI	MUNICH	8780	464 121	10,4	49,0
BANGKOK - SUVARNABHUMI	FRANKFURT	8970	460 756	4,1	-33,6
ISTANBUL	SUBANG	8357	438 847	25,6	200,9
BANGKOK - SUVARNABHUMI	ZURICH	9024	434 493	-0,1	-1,4



Routes to Japan and Thailand posted the strongest increases: Tokyo-Haneda – London-Heathrow surged by +19.7%, while Bangkok – Istanbul recorded an impressive +59.5%, reflecting the renewed vitality of Asian tourism and Istanbul’s growing role as an intercontinental hub.

France also stood out, with Paris-CDG – Tokyo-Haneda (+38.8%) and Paris-CDG – Shanghai-Pudong (+100.5%) illustrating a marked resurgence in flows between Europe and East Asia, despite volumes still remaining below pre-pandemic levels.

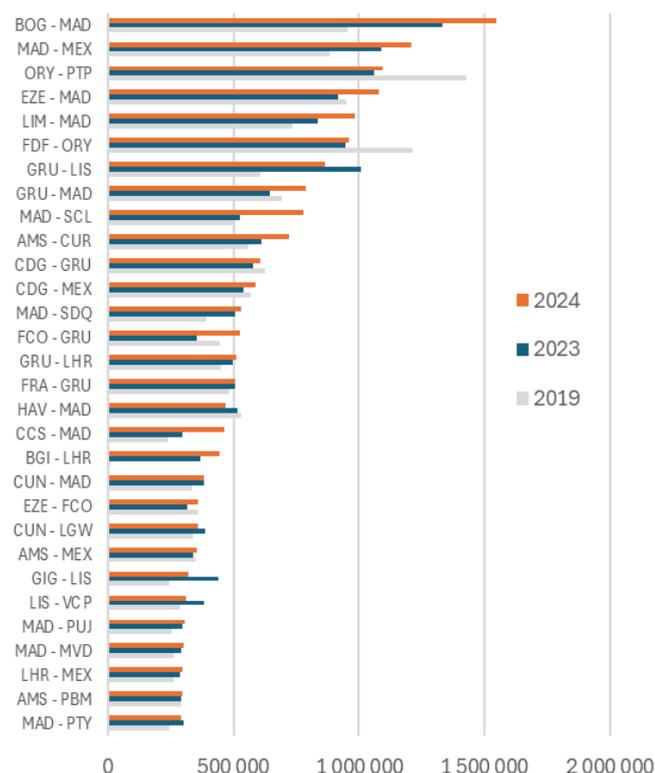
Europe - Asia & Oceania traffic distribution



10 LATIN AMERICA & CARIBBEAN

In 2024, air traffic between Europe and Latin America confirmed its sustained recovery, now exceeding pre-crisis volumes. The total number of passengers between the two regions grew by around +15% year-on-year, driven by the strong performance of Iberian and South American routes. The Bogotá – Madrid-Barajas connection remained the busiest, with 1.55 million passengers (+16% vs 2023, +61.6% vs 2019), followed by Mexico – Madrid and Buenos Aires – Madrid, both showing significant increases.

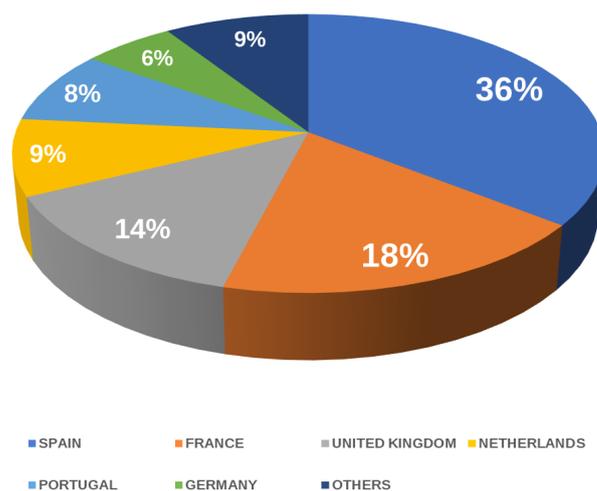
Airport	Airport	Dist. KM	2024	% 24/23	% 24/19
EL DORADO	MADRID - BARAJA	8031	1 546 093	16,0	61,6
MADRID - BARAJA	BENITO JUAREZ	9068	1 208 106	11,2	36,9
PARIS - ORLY	POINTE-A-PITRE INTL	6753	1 091 799	3,1	-23,6
EZEIZA	MADRID - BARAJA	10077	1 077 881	17,3	13,6
JORGE CHAVEZ	MADRID - BARAJA	9525	985 526	18,0	34,3
MARTINIQUE INTL	PARIS - ORLY	6852	957 857	1,1	-21,2
GUARULHOS	PORTELA	7934	864 997	-14,3	42,2
GUARULHOS	MADRID - BARAJA	8377	786 657	22,4	13,4
MADRID - BARAJA	ARTURO BENITEZ	10725	777 760	48,7	53,5
SCHIPHOL	HATO	7835	720 627	17,8	29,3
PARIS - CDG	GUARULHOS	9406	608 453	5,2	-2,7
PARIS - CDG	BENITO JUAREZ	9200	587 884	9,1	3,4
MADRID - BARAJA	LAS AMERICAS	6689	527 931	4,4	34,0
FIUMICINO	GUARULHOS	9432	524 410	49,0	18,0
GUARULHOS	LONDON - HEATHROW	9461	513 271	3,4	13,9
FRANKFURT	GUARULHOS	9798	506 165	-0,4	4,9
JOSE MARTI	MADRID - BARAJA	7458	468 816	-9,2	-11,4
SIMON BOLIVAR MAIQUETIA	MADRID - BARAJA	7004	464 087	57,0	92,8
GRANTLEY ADAMS	LONDON - HEATHROW	6752	442 966	20,4	5847,4
CANCUN	MADRID - BARAJA	7905	383 570	0,0	15,5
EZEIZA	FIUMICINO	11148	360 446	13,7	0,3
CANCUN	LONDON - GATWICK	7927	359 752	-6,7	6,5
SCHIPHOL	BENITO JUAREZ	9208	352 043	3,5	1,1
GALEAO	PORTELA	7715	319 036	-27,6	30,1
PORTELA	CAMPINAS VIRACOPOS	7926	311 274	-18,8	9,4
MADRID - BARAJA	PUNTA CANA	6572	306 899	3,9	21,2
MADRID - BARAJA	CARRASCO	9947	301 839	4,1	14,0
LONDON - HEATHROW	BENITO JUAREZ	8906	297 852	4,3	13,7
SCHIPHOL	ZANDERY	7525	294 380	0,8	1,4
MADRID - BARAJA	TOCUMEN	8160	291 065	-2,7	19,2



Spain thus continues to serve as the main gateway to Latin America, accounting for more than one-third of total traffic and further expanding its regional share. France remains the second-largest European hub, with stable traffic between Paris-Orly and the French Caribbean, though still below 2019 levels (-21% to -23%). Portugal is also strengthening its position, with marked growth on routes such as Lisbon – São Paulo and Lisbon – Santiago de Chile.

Overall, the Latin America & Caribbean region ranks among the year’s top-performing markets.

Europe - Latin America traffic distribution



Sources : FRACS Air transport data, ACI

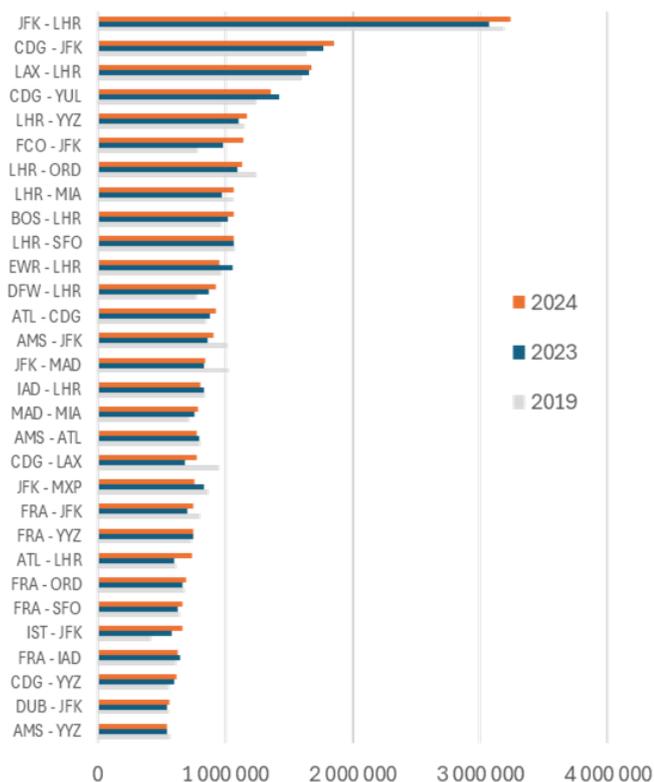


11 NORTH AMERICA

In 2024, air traffic between Europe and North America continued to grow, confirming the strength of this transatlantic corridor — historically the densest in the global network. The New York-JFK – London-Heathrow route remained the busiest, with 3.24 million passengers (+5.4% vs 2023, +1.5% vs 2019), surpassing its pre-pandemic level for the first time.

While the United Kingdom still accounts for more than a quarter of total traffic, France and Italy are gaining ground, whereas German and Dutch hubs remain stable or show a slight decline.

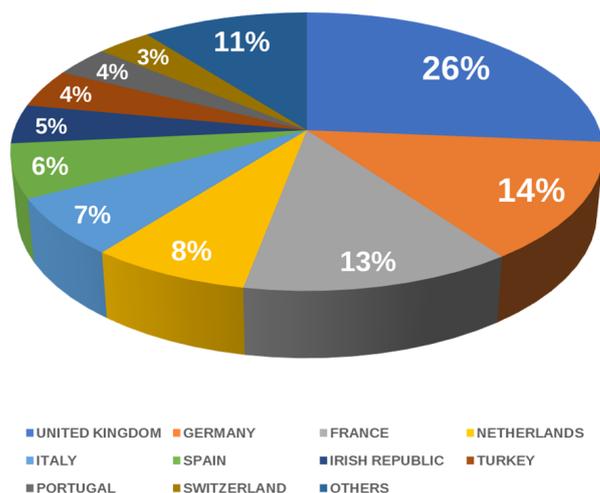
Airport	Airport	Dist. KM	2024	% 24/23	% 24/19
NEW YORK - JF KENNEDY	LONDON - HEATHROW	5541	3 238 557	5,4	1,5
PARIS - CDG	NEW YORK - JF KENNEDY	5834	1 852 909	4,7	13,2
LOS ANGELES INTL	LONDON - HEATHROW	8761	1 679 883	1,0	4,8
PARIS - CDG	DORVAL	5524	1 361 014	-4,6	9,1
LONDON - HEATHROW	PEARSON INTL	5708	1 173 422	5,8	1,9
FIUMICINO	NEW YORK - JF KENNEDY	6867	1 141 515	16,4	44,5
LONDON - HEATHROW	CHICAGO - O'HARE	6344	1 135 610	3,9	-9,2
LONDON - HEATHROW	MIAMI INTL	7109	1 072 645	10,1	0,2
LOGAN	LONDON - HEATHROW	5240	1 071 220	5,1	10,4
LONDON - HEATHROW	SAN FRANCISCO	8618	1 069 332	0,4	-0,6
NEW YORK - NEWARK	LONDON - HEATHROW	5563	952 539	-9,8	-2,6
DALLAS - FORT WORTH	LONDON - HEATHROW	7623	929 411	6,7	19,3
HARTSFIELD	PARIS - CDG	7055	926 989	4,7	9,0
SCHIPHOL	NEW YORK - JF KENNEDY	5849	905 043	4,9	-11,3
NEW YORK - JF KENNEDY	MADRID - BARAJA	5763	839 449	0,8	-18,5
DULLES	LONDON - HEATHROW	5902	809 688	-2,4	-3,9
MADRID - BARAJA	MIAMI INTL	7106	787 576	3,8	9,3
SCHIPHOL	HARTSFIELD	7066	777 968	-2,0	-3,8
PARIS - CDG	LOS ANGELES INTL	9103	776 127	12,9	-18,8
NEW YORK - JF KENNEDY	MALPENSA	6414	758 726	-8,9	-13,3
FRANKFURT	NEW YORK - JF KENNEDY	6190	749 554	6,8	-6,6
FRANKFURT	PEARSON INTL	6343	748 951	-0,1	1,6
HARTSFIELD	LONDON - HEATHROW	6761	739 622	22,4	18,9
FRANKFURT	CHICAGO - O'HARE	6970	694 397	4,0	1,7
FRANKFURT	SAN FRANCISCO	9149	665 072	5,0	2,6
ISTANBUL	NEW YORK - JF KENNEDY	8029	661 870	12,9	55,1
FRANKFURT	DULLES	6550	626 765	-3,3	1,6
PARIS - CDG	PEARSON INTL	6019	620 228	2,7	9,9
DUBLIN	NEW YORK - JF KENNEDY	5105	566 917	4,4	0,0
SCHIPHOL	PEARSON INTL	5990	548 808	0,2	-3,4



London-Heathrow continues to serve as Europe’s main gateway to North America, appearing in most of the top 20 connections — including routes to Los Angeles, Toronto, Miami, and Boston.

France consolidates its second position, with particularly dynamic links such as Paris-CDG – New York-JFK (+4.7%) and Paris-CDG – Los Angeles (+12.9%). Rome-Fiumicino – New York-JFK also stands out with a sharp increase (+16.4%), illustrating Italy’s growing presence in transatlantic traffic.

Europe - North America traffic distribution



Sources : FRACS Air transport data, ACI



12 AIRLINERS' ORDERS AND DELIVERIES - Q2 2024

In the second quarter of 2025, Airbus maintained strong activity levels, with deliveries remaining stable but slightly below last year's figures. The A220 was the only aircraft in its range to see higher deliveries than in 2024 (+17 units). Despite this minor delay against targets, the A320 has recently become the most-produced aircraft in history, surpassing Boeing's B737, which had held the title for over half a century.

In terms of deliveries, Boeing fulfilled its order book with a significant increase — 105 more aircraft delivered than last year, the majority being 737s. The gap between the two manufacturers has narrowed considerably during the first half of 2025.

On the orders side, both industry giants experienced a stronger semester, recording a notable rise in new contracts. Their backlogs now represent nearly 11 years of production.

Deliveries	Q1 2025	Q2 2025	S1 2025	S1 25/24 Variation	2024
Airbus	136	170	306	-17	766
Boeing	130	150	280	105	339
Embraer	7	19	26	-5	57
ATR	n.a.	n.a.	n.a.	-	35
Comac	n.a.	n.a.	n.a.	-	48

Orders	Q1 2025	Q2 2025	S1 2025	S1 25/24 Variation	2024
Airbus	280	214	494	167	878
Boeing	241	427	668	512	569
Embraer	0	120	120	100	28
ATR	n.a.	n.a.	n.a.	-	56
Comac	n.a.	n.a.	n.a.	-	n.a.

Deliveries	Type	Q1 2025	Q2 2025	S1 2025	S1 25/24 Variation	2024
Airbus	A220	21	24	45	17	84
	A320	102	126	228	-33	593
	A330	4	8	12	-1	32
	A350	9	12	21	0	57
Boeing	B737	105	104	209	72	265
	B767	5	9	14	5	18
	B777	7	13	20	13	14
	B787	13	24	37	15	42
Embraer	EMB170	0	0	0	0	0
	EMB175	4	9	13	2	19
	EMB190	0	1	1	-9	14
	EMB195	3	9	12	2	38
ATR	ATR-42	n.a.	n.a.	n.a.	-	35
	ATR-72	n.a.	n.a.	n.a.	-	
Comac	C909	n.a.	n.a.	n.a.	-	35
	C919	n.a.	n.a.	n.a.	-	13

Orders	Type	Q1 2025	Q2 2025	S1 2025	S1 25/24 Variation	2024
Airbus	A220	0	40	40	39	18
	A320	233	58	291	95	636
	A330	10	61	71	44	82
	A350	37	55	92	-11	142
Boeing	B737	135	208	343	242	417
	B767	0	0	0	0	23
	B777	53	30	83	41	66
	B787	53	189	242	229	63
Embraer	EMB170	0	0	0	0	0
	EMB175	0	57	57	-33	90
	EMB190	0	15	15	6	17
	EMB195	0	48	48	37	11
ATR	ATR-42	n.a.	n.a.	n.a.	-	5
	ATR-72	n.a.	n.a.	n.a.	-	51
Comac	C909	n.a.	n.a.	n.a.	-	n.a.
	C919	n.a.	n.a.	n.a.	-	300

Source : FRACS Air transport data



OUR DATABASES AND SERVICES

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