AVIATION INTELLIGENCE+

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EUROCONTROL

Impact of the French ATC strike of 3 & 4 July 2025 on European Aviation

On 3 and 4 July 2025[1], industrial action by French air traffic controllers triggered the implementation of minimum service levels in France and significantly negatively impacted air transport in Europe, in particular flights[2] scheduled to fly over France (overflights).

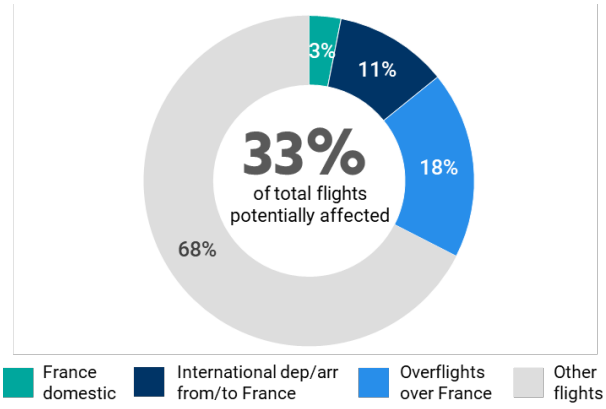
Across Europe **3,713 flights were delayed (10.7% of all flights) and 1,422 flights were cancelled**[3] **(4.7% of all scheduled flights) each day** on average, affecting more than **one million passengers**. The total amount of direct air traffic flow management (ATFM) delay was **354,000 minutes** for both days, leading to an average **delay per delayed flight of 41 minutes** due to the strike. **425 flights** were **delayed** over the two days by more than 2 hours.

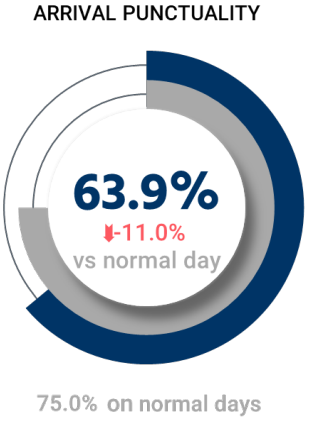
An additional **6 million km** were flown for the duration of the strike, with an average **additional 18,000 tons of fuel** burnt and more than **60,000 excess tons of CO_2 emissions**.

While the impact on **France** was substantial, it also severely impacted its neighbours, notably **Spain**, the **UK** and **Italy**.

Impact of the strike on the network

Around **33% of European flights cross, land or take off in France** each day. The majority (almost 60%) of these flights are overflights. These flights are **highly susceptible to delays and cancellations**[3] triggered by industrial action in France. The number of impacted flights rises further due to the knock-on effect of the ATFM delays on later flights by the same aircraft to other parts of Europe.



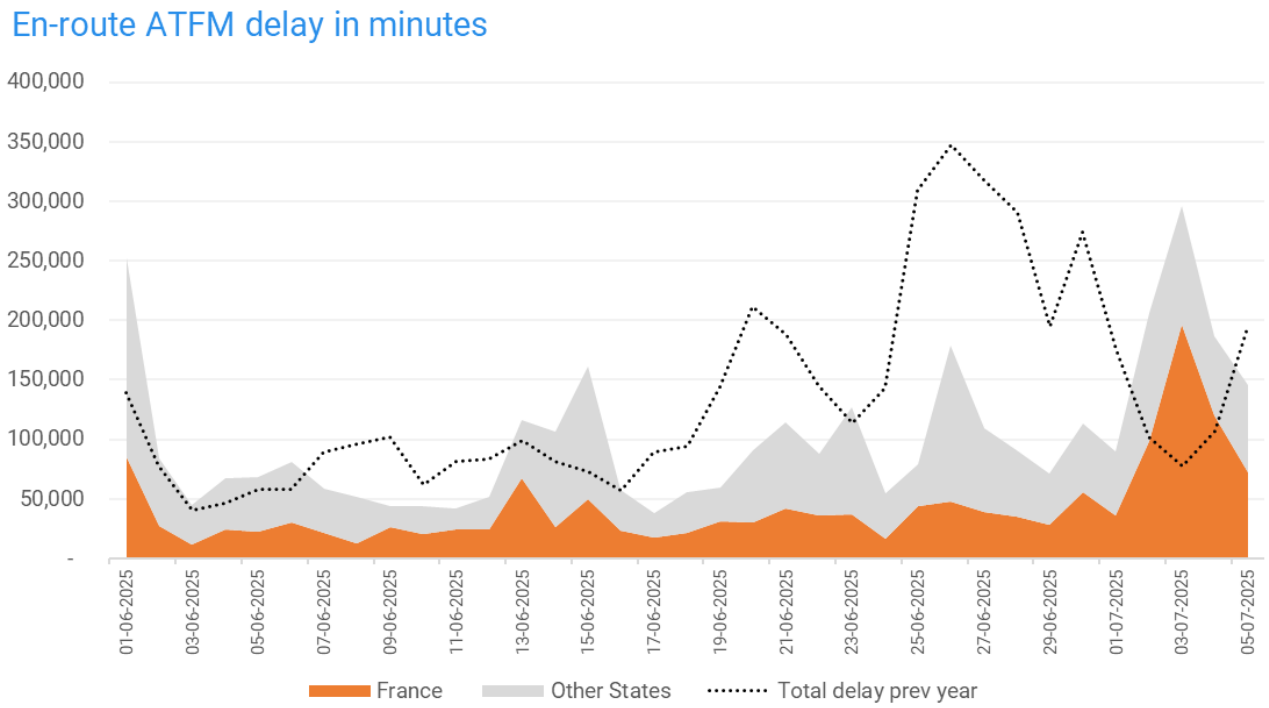


The following figures summarise the effect of the strikes in France on **3 and 4 July 2025** at **network level**:

- **More than one million passengers were affected** by the French strikes.
- During the strike, approximately **200,000 passengers were unable to fly as they had intended**, as a result of cancellations.
- When compared to a normal day[4], there were on average **1,422 additional cancellations, representing 4.7% of scheduled flights**[5]. Daily cancellations increased by 59%.

European Aviation Trends
July 2025

- **Almost 4 out of 10 flights arrived late.** Arrival **punctuality** at network level deteriorated **from 75% on a normal day in June to 64%** on average for the two strike days. For those flights that were not cancelled, flights arrived on average 24 minutes later than scheduled, **10 minutes more delay than on a normal day**.
- For those flights arriving in, or departing from, France, arrival punctuality (defined as flights arriving within 16 minutes of their scheduled time) dropped from **73% to 50%**, while average delay per flight increased from **14 to 38 minutes**.
- **A severe impact in other countries**. Strikes in France have a severe impact on traffic not only in France itself but also in other countries, in particular its neighbours, as outlined below.
- **En-route ATFM delay** (the time that an aircraft is held on the ground by the EUROCONTROL Network Manager because of a lack of air traffic control (ATC) capacity along its route) was **1.6 times higher than the same two operational days in 2024**, with France representing 66% of the total.
- In addition to the 354,000 minutes of direct ATFM delays on 3 and 4 July, **an additional 20,000 minutes of direct ATFM delays** were caused on 2 July by French industrial action.
- The average ATFM delay of a delayed flight was **41 minutes**. 6% of flights delayed by ATFM, or **425 flights in total, were delayed by more than 2 hours**.



Impact on States

In France, the impact of the strikes was substantial. Almost **40% of flights departing France were delayed** as a direct result of the strikes, while **52% of scheduled flights were cancelled**.

The French strike also had a severe impact on traffic in other countries, in particular its neighbours. Spain had 978 daily departing flights delayed as a direct result of the strikes, more than France itself (819); the next most impacted States were the UK (401) and Italy (319). However, in terms of share of departing flights affected by the strike, France was the highest (39%) followed by Spain with 27%, then Portugal (24%), Morocco (23%), Belgium (17%) and Switzerland (16%).

No.	Country	Avg departure flights delayed by French strikes	Of which, flying to France	Overflying France	% of all departure flights	ATFM delay per delayed flight by French strikes (min)	Additional daily cancellations vs normal days*
1.	Spain	978	60	918	27%	42.0'	+274 (+100%)
2.	France	819	285	534	39%	41.7'	+653 (+388%)
3.	United Kingdom	401	66	335	11%	41.8'	+142 (+67%)
4.	Italy	319	81	238	11%	38.4'	+82 (+68%)
5.	Germany	220	30	190	7%	41.1'	+81 (+48%)
6.	Portugal	200	32	168	24%	40.0'	+47 (+88%)
7.	Switzerland	118	20	98	16%	40.0'	+36 (+90%)
8.	Belgium	95	21	75	17%	35.6'	+21 (+62%)
9.	Morocco	88	23	65	23%	44.7'	+36 (+169%)
10.	Netherlands	72	16	56	8%	25.6'	+22 (+64%)

** Normal days = Average first three weeks of June (2-22 June 2025). Non-operated schedules used as proxy for cancellations*

Most of these affected flights were not flying to France directly but were **overflying** France en-route to another country. For Spain this amounted to 94% of its affected flights (918 out of 978), whereas for the other States, between 65% and 86% of their impacted flights were overflights rather than flights to France.

The average ATFM delay per delayed flight for those flights departing from impacted States was between 25 and 45 minutes, with an **average of 41 minutes**.

Furthermore, the table above does not take into account the knock-on effect of ATFM delays on later flights by the same aircraft; as a result, the actual percentage of flights departing later than 16 minutes of their scheduled time on strike days is much higher, between 39% and 65% for the countries in the list.

Compared to a normal day[4], there were almost 5 times as many cancelled flights in France. In Morocco there were 2.7 times as many cancellations, and in Spain they doubled. For the rest of the most affected States, cancellations[3] increased between 48% and 90% compared to a normal day.

Impact on aircraft operators

The impact of strike actions on individual aircraft operators depends on the routes they operate and on specific city pairs. In terms of the number of delayed flights, the airline group **most affected by these French strikes was Ryanair**, with a daily average of 718 flights with an ATFM delay attributed to industrial action, followed by easyJet (407) and Air France (275). The highest share of flights delayed by the strikes was Volotea on 34%, followed by Air France (33%), easyJet (25%), Ryanair (21%) and Vueling (20%). The average delay per delayed flight for Europe's ten busiest airlines/airline groups due to the strikes was 22 minutes.

As for States, it is important to note that these ATFM delays do not reflect additional strike impacts, such as knock-on delays and longer flying times caused by avoiding French airspace. Overall, these airlines suffered a reduction in punctuality of between 8% and 30%.

No.	Aircraft operator*	Avg departure flights delayed by French strikes	% of all departure flights	ATFM delay per delayed flight by French strikes (min)
1.	Ryanair Group	718	21%	50.7'
2.	easyJet Group	407	25%	42.1'
3.	Air France Group	275	33%	27.9'
4.	Vueling	131	20%	31.3'
5.	Eurowings Group	115	19%	41.2'
6.	Jet2.com	114	23%	36.9'
7.	British Airways Group	98	11%	37.2'
8.	Wizz Air Group	95	10%	40.9'
9.	Volotea	81	34%	44.4'
10.	KLM Group	80	9%	24.6'

** The composition of the aircraft operator groups can be consulted @ www.eurocontrol.int/directory/airline-groups-lookup*

Impact on airports

The impact of strike actions at individual airports depends on the routes of the flights from/to that airport.

In France, the **impact of the strikes was substantial**, causing ATFM delays as well as cancellations.

In terms of the number of daily delayed departure flights, the **airports most affected** by these French strikes were **Palma de Mallorca** with a daily average of 196 departure flights with an ATFM delay attributed to industrial action, followed by **Barcelona** (162), **Paris Charles de Gaulle** (155) and Madrid Barajas (144). The highest share of flights delayed by the strikes was Marseille with 81%, followed by Lyon (67%), Palma de Mallorca (43%), Alicante (42%), Paris Orly (40%) and Malaga (38%). The average delay per delayed flight for Europe's ten most affected airports due to the strikes was 36 minutes.

As for States and aircraft operators, it is important to note that these ATFM delays do not reflect additional strike impacts, such as knock-on delays and longer flying times caused by avoiding French airspace.

No.	Airport	Avg departure flights delayed by French strikes	% of all departure flights	ATFM delay per delayed flight by French strikes (min)	Decrease in dep. punctuality vs normal days*	Additional daily cancellations vs normal days*
1.	Palma de Mallorca	196	43%	35.3'	-28 pp	+43 (+118%)
2.	Barcelona	162	31%	33.4'	-31 pp	+44 (+210%)
3.	Paris Charles de Gaulle	155	27%	24.0'	-21 pp	+172 (+469%)
4.	Madrid Barajas	144	24%	47.8'	-28 pp	+39 (+109%)
5.	Malaga	114	38%	31.3'	-27 pp	+25 (+88%)
6.	Marseille	101	81%	56.8'	-47 pp	+50 (+522%)
7.	Paris Orly	90	40%	29.3'	-34 pp	+118 (+748%)
8.	Lisbon	82	25%	36.6'	-20 pp	+16 (+109%)
9.	Alicante	81	42%	44.0'	-31 pp	+14 (+175%)
10.	Lyon	70	67%	26.9'	-44 pp	+47 (+1178%)

** Normal days = Average first three weeks of June (2-22 June 2025). Non-operated schedules used as proxy for cancellations*

Environmental and financial impacts

In addition to the impact on passengers, strikes can also have a large environmental footprint. EUROCONTROL estimates that over 3 and 4 July 2025[1], an additional **6 million km** were flown for the duration of the strike, with an average **additional 18,000 tons of fuel burnt** and more than **60,000 excess tons of CO_2 emissions**.

The cost of delays for aviation is currently calculated as approximately 127 €/ minute (based on the last detailed study "European airline delay cost reference values" conducted by the University of Westminster with the inflation rate value annually adjusted based on the EU27 average inflation rate). The cost of the **delays** for the two days of the strike was therefore **approximately 47M€.** The cost of **cancellations** is more difficult to estimate as it depends on many more factors, but is **estimated to be around 73 M€**[6].

As an example, a large number of flights to/from the Canarias FIR had to extend their path by more than 300 nautical miles (600 km) in order to avoid French airspace[7] when compared to a non-strike day.

Strike Period (3 & 4 July 2025)	
	6,000,000 additional km flown
	18,000 tons of additional fuel burnt
	60,000 additional tons of CO_2 emissions

Conclusions

An ATC strike in France has the potential to impact a third of flights across the continent, showing the disproportionate impact that disruptions in one busy country can have on the European network as a whole.

While this paper does not question the right to strike, it aims to highlight that strikes such as this one have an impact not only on flights arriving in or departing from the country in question, but also on flights to and from neighbouring countries. The knock-on effect of delays and cancellations are felt far beyond the country where the strike is taking place, and can impact millions of people in Europe and beyond.

Although France does have minimum service provisions that prevent the complete closure of its ATC operations, these do not protect overflights. Minimum service regulations across Europe that protect overflights (such as are the case in, for example, Italy and Spain) would better protect the flying public from the disruptions described in this paper.

[1] The strike period considered in this document is 3 and 4 July. However, it should be noted that industrial action also took place on the afternoon of 2 July, with 20,000 minutes of ATFM delay also attributable to that action.

[2] In the context of this paper, flights should be understood as IFR (Instrument Flight Rules) movements.

[3] In this paper, 'cancellations' or 'cancelled flights' refer to non-operated scheduled flights by comparing schedules on D-2 (two days before the expected flight) with the flights that actually flew. This provides an approximation of the number of cancellations – but does not, for example, capture a flight cancelled three or more days before it was due to take place. For this reason, the figures in this document cannot be used in the context of the Regulation (EC) No 261/2004 of the European Parliament and of the Council.

[4] A 'normal day', as opposed to a 'strike day', is calculated as a weighted average of the number of flights during the first three weeks of June (2-22 June 2025).

[5] This can be attributed to the flight reduction programme set up by France in response to the strikes, to airlines cancelling flights in order to avoid long delays/flying times related to strikes, or to flights not operated by airlines for other reasons.

[6] Based on the system-wide average cancellation cost estimated for 2022 at approximately €20,930 ref 'EUROCONTROL Standard Inputs for Economic Analysis'- https://www.eurocontrol.int/sites/default/files/2024-05/eurocontrol-standard-inputs-economic-analyses-ed-10.pdf.

[7] Based on FIRs (Flight Information Regions).