

ERA Monthly Market Analysis

July 2025

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Introduction

For the production of these statistics in the following report, ERA has teamed up with partners Cirium to provide a comprehensive analysis of ERA's members' performance.

The analysis performed by Cirium is based on schedule data that has been provided by Cirium using SRS analyser and gives a comprehensive overview of the sector.

This report examines the performance of ERA member carriers who report schedule data to Cirium.

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CIRIUM

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Cirium, has incorporated schedules data, formerly known as Innovata into its data and analytics powerhouse and is a leading source of airline schedules data covering more than 800 carriers worldwide and is a strategic partner of IATA, the trade association for the world's airlines. Cirium licenses its schedules to clients across the air travel and transportation sectors; builds, hosts and maintains a wide range of electronic timetable and route network mapping solutions; feeds a range of third party aviation schedules analysis tools to airports and other travel players.

Summary

With the Summer schedule in full swing we see a healthy increase in available seats and flights offered compared to July 2024.

The two headline figures are a 5.4% increase in available seats and 3.9% increase in flights offered in Jul 25 compared to the same month last year.

Comparing flights offered in Jul 2019 to Jul 2025 we still see a decrease of -17% (110,535 vs 91,348).

Average aircraft seating capacity was 92 seats with sector duration at 1hr 24mins for Jul, both in line with the ERA trends across the last 12 months.

Stage length was 769km which is a 2.2% decrease compared to the same month last year.

Unique routes operated shows a -1.9% decrease compared to Jul 24.

Published schedules for Summer 25 (May-October) indicate an increase of 1.4% in total seats and an increase of 0.7% in total flights offered compared to Summer 24.

These figures may change as carriers update their schedules.

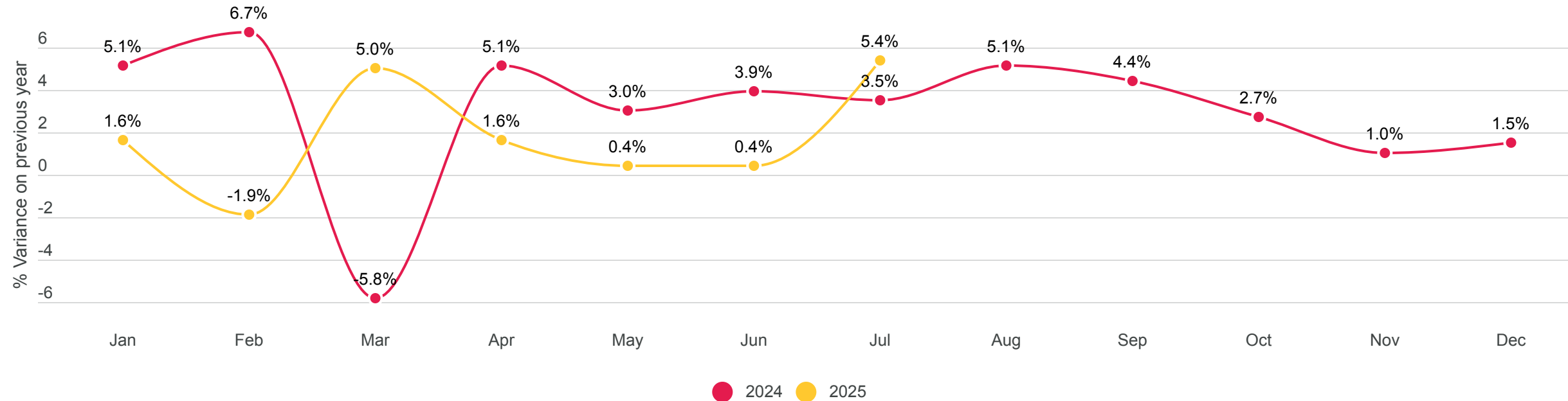
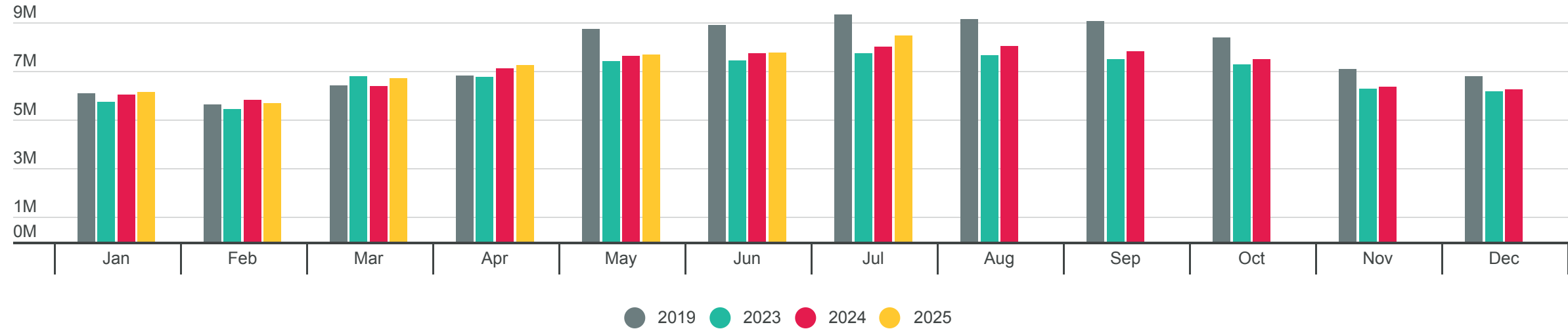
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Deployed Capacity

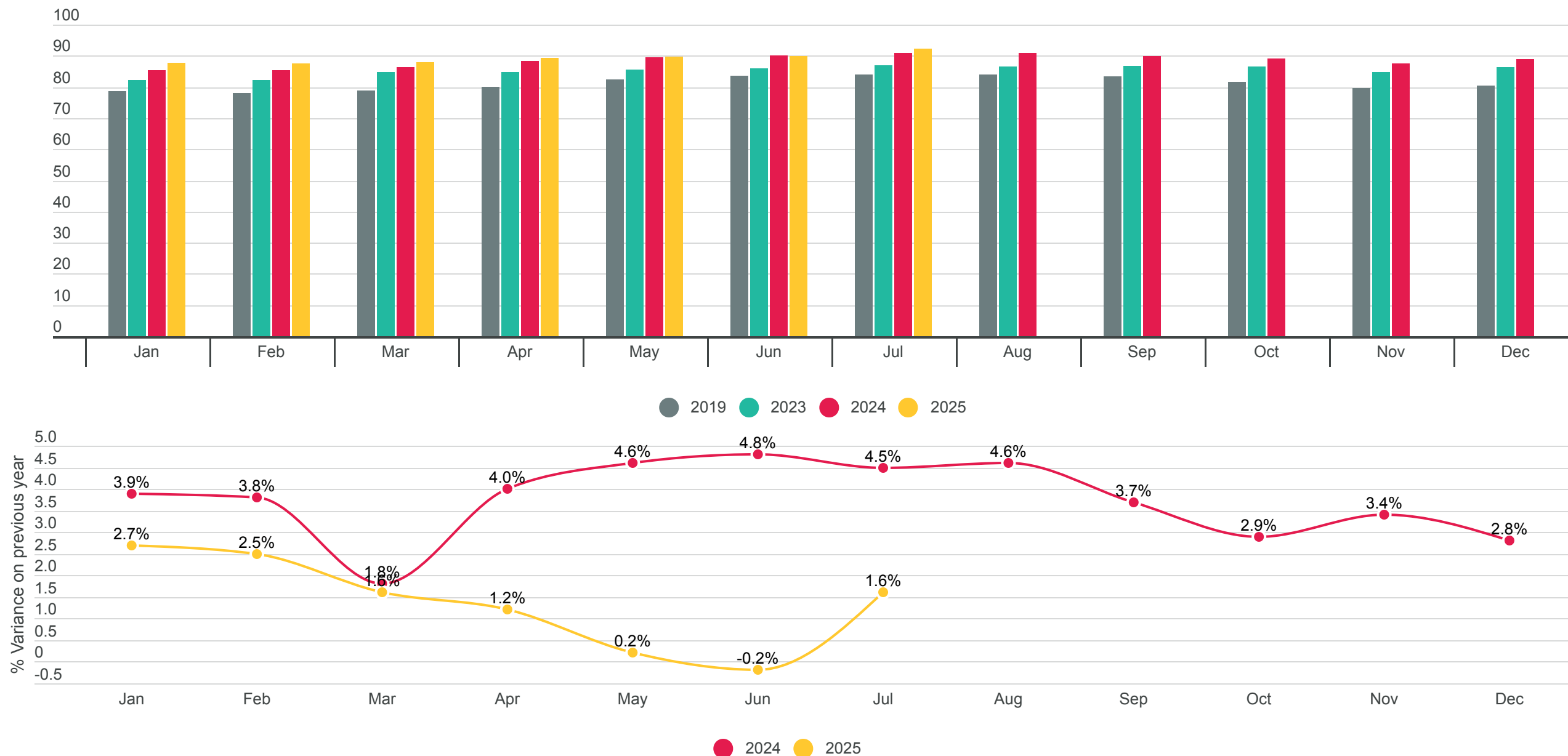
Scheduled seats by ERA carries Jan-Dec 2024

Total Seats



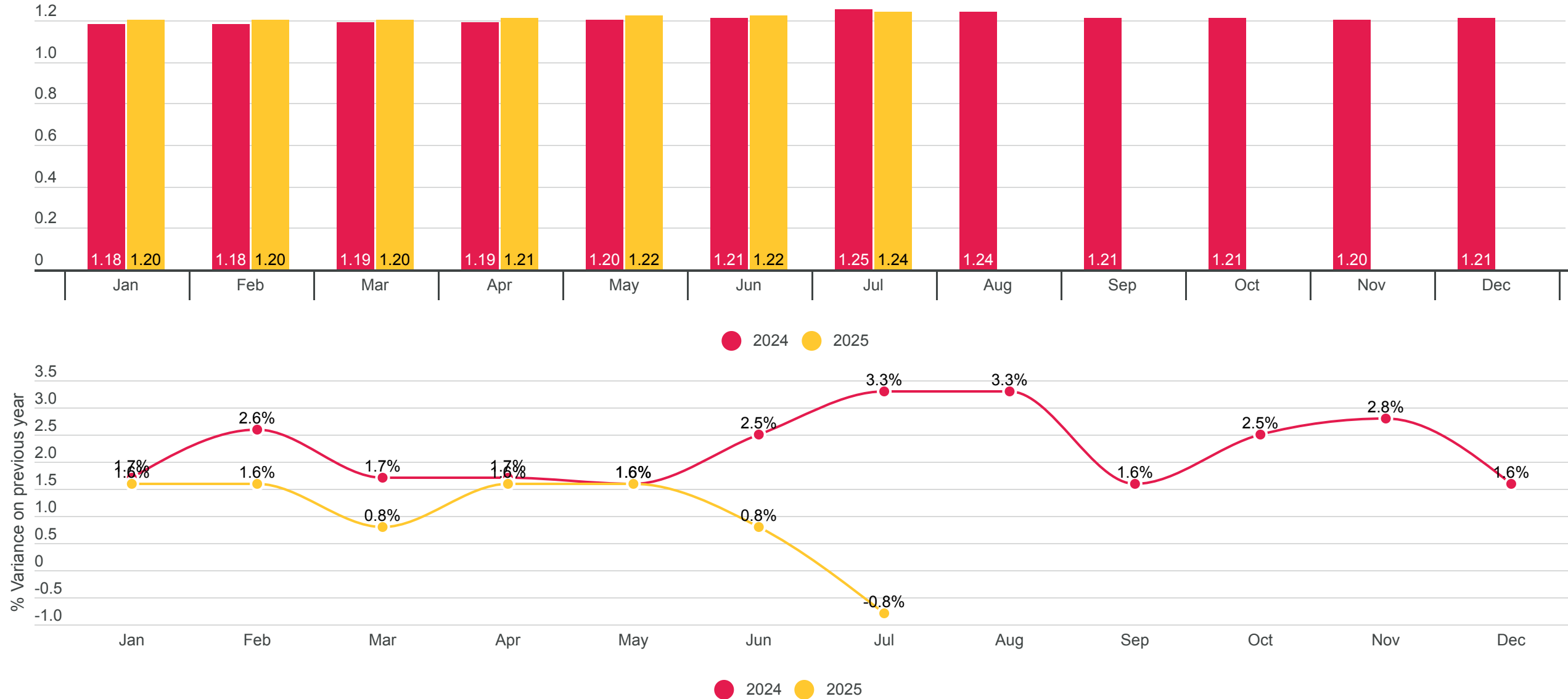
Aircraft Seating Capacity

Average seats per departure



Sector Duration

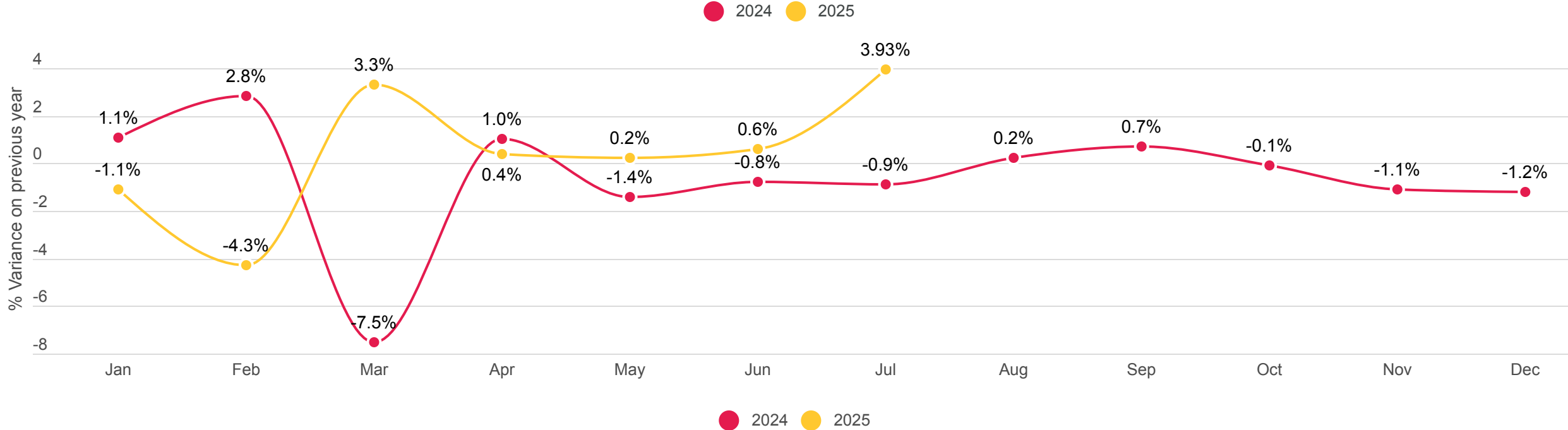
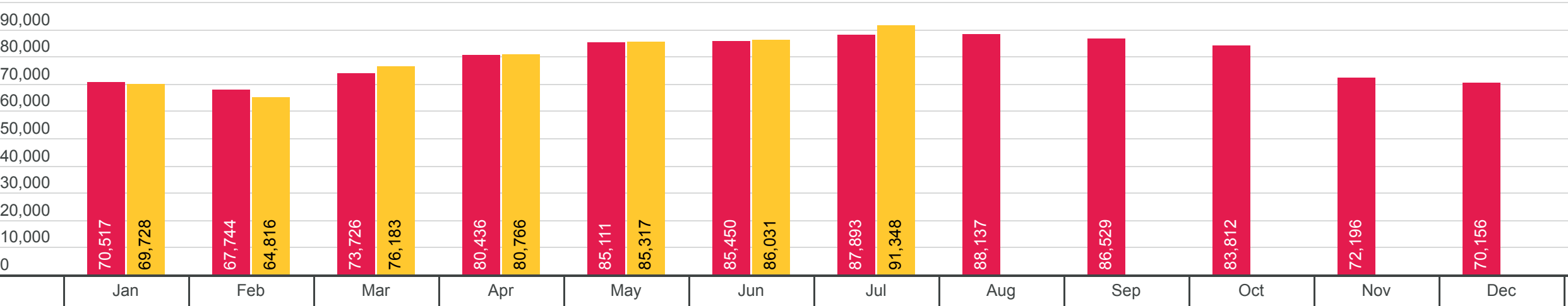
Average sector duration in hours





era
european regions airline association

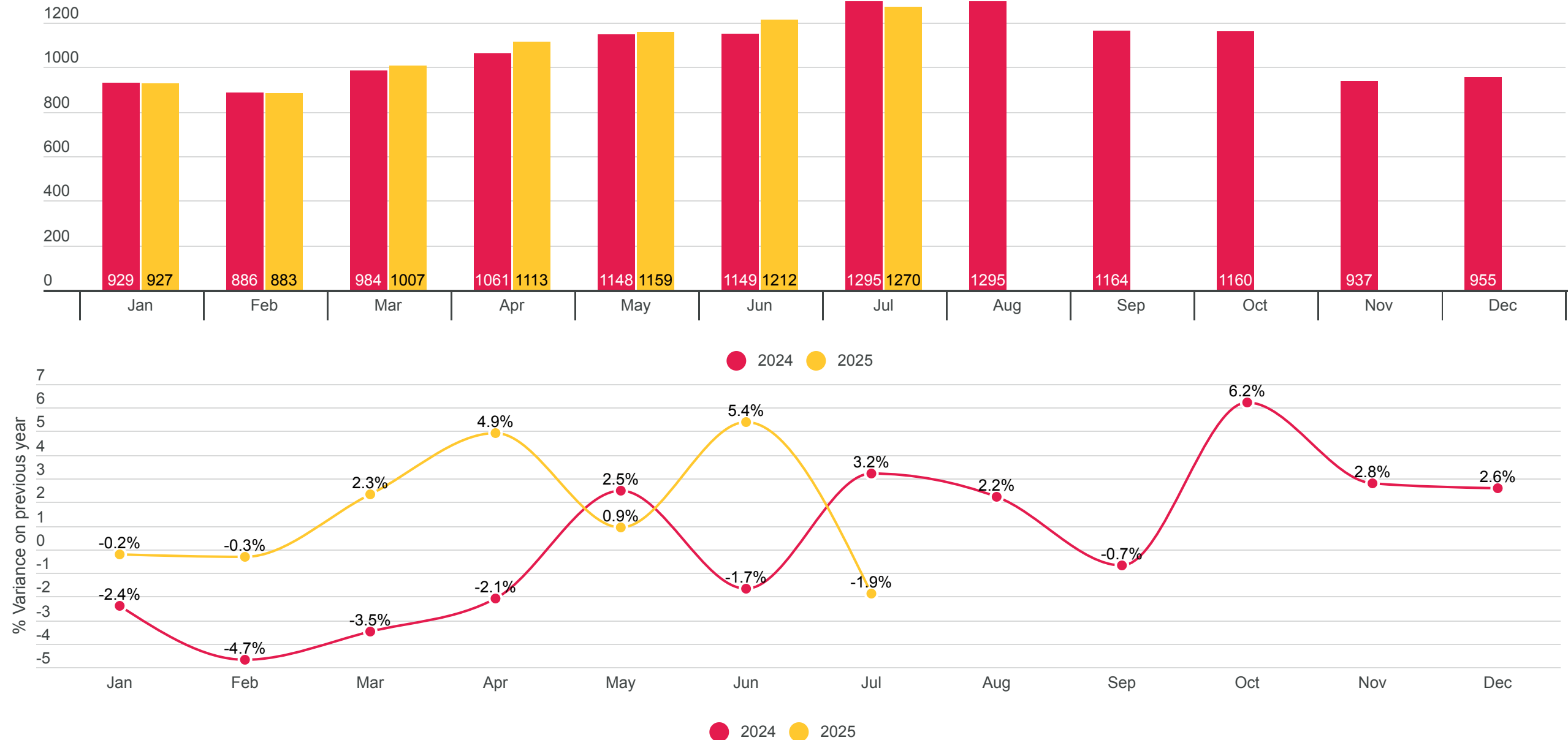
Total Movements



2019 shown as a benchmark against the last 3 years of data for deployed capacity, aircraft seating and stage length

Route Count

Unique Routes Operated By ERA Member Airlines



Stage Length

Average stage length in kilometres (km)

