



# GLOBAL AVIATION MONITOR

## December 2025

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Statistical Report of Global, European and German Air Transport

# Contents December 2025

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# The DLR Global Aviation Monitor

The Global Aviation Monitor is a statistical report series from the DLR Institute of Air Transport of the German Aerospace Center, which serves as a supplement to various statistics, such as those from the Federal Statistical Office or the German Airports Association (ADV).

It provides monthly reports on the supply of flights in Germany, Europe, and worldwide. The development of flights over the last fifteen months is presented in the form of a time series. Additionally, there is a monthly ranking of the largest airports and airlines in Germany, Europe, and worldwide, which are compared to the values of the previous year. The data is released during each month and represents the planned data for the current month.

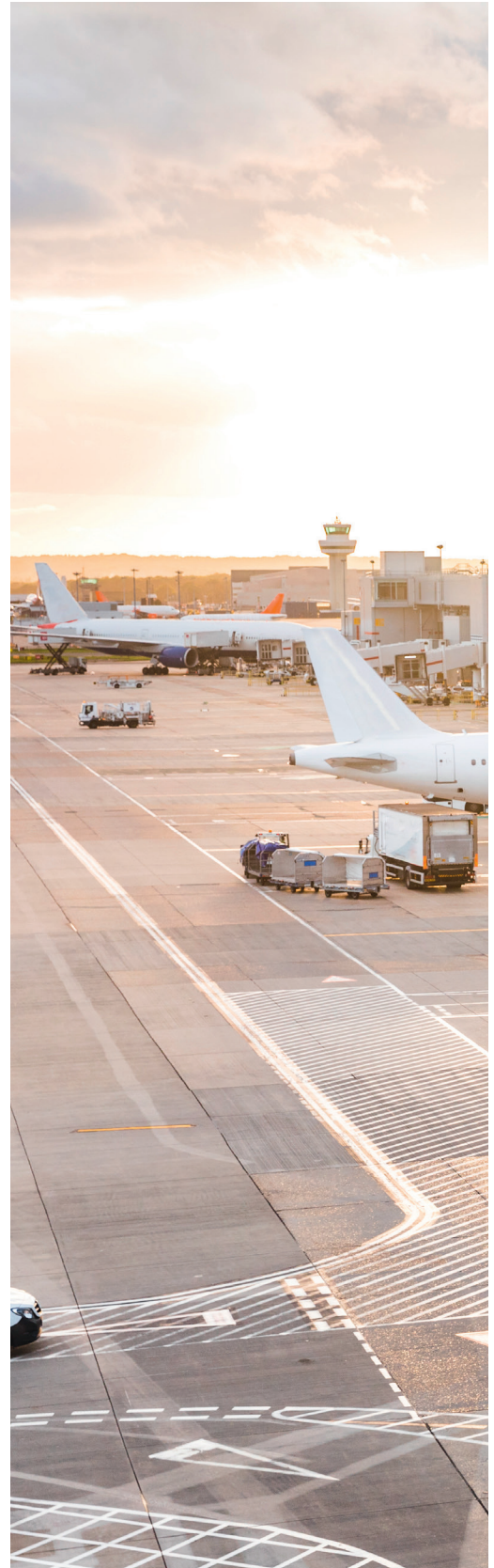
This report fills a gap that is of interest to both airports and airlines in assessing their position on a global scale. It is of interest to policy-makers, administrators, industry stakeholders, and tourism offices to gauge the performance of their region. In the event of significant changes, it is worthwhile to examine closely what has caused them. Due to its monthly updates, the report can serve as a leading indicator for trends and developments.

The Institute of Air Transport provides further advanced forecasting capabilities. Combining established statistical techniques with innovative modelling approaches and a broad dataset, it delivers short-, medium-, and long-term forecasts on passenger and cargo traffic, airport capacity, fleet development, and route networks. These insights support strategic decision-making for stakeholders across the sector, reinforcing the institute's role in shaping future air transport planning at regional and global levels.



**The report is being developed at the Air Transport Development department of the DLR Institute of Air Transport.**

Global air traffic and emissions are projected to rise in the coming decades, driving the need for sustainable technological advancements. The department researches forecasting methods to anticipate demand and supply across different regions and aircraft types. These forecasts support strategic planning for infrastructure, connectivity, and environmental measures. By combining ecological, economic, and social factors, the department assesses new technologies and develops scenarios and roadmaps to guide the aviation sector towards climate-compatible growth.





# Number of Monthly Departures in December 2025

## Ranking by Airports

### Globally, for Europe & Germany

#### Chicago leads global airport rankings

At 23 of the world's 25 largest airports, departures increased in December 2025 compared with the previous year. The top four airports are all in North America, with Chicago leading at around 34,400 departures and continued traffic growth. Istanbul and London Heathrow rank 10th and 13th, while Guangzhou, Tokyo Haneda and Shanghai Pudong place 5th, 7th and 8th. Frankfurt stands 31st globally. Chicago's strong growth is driven by increased capacity at American Airlines and United Airlines.

This figure shows the twenty-five largest **airports worldwide**, measured in passenger flights.

Tab. 1: Number of monthly departures at the largest airports in the world

Rank	Airport	12/2025	Growth rate
1	Chicago O'Hare International	34,372	13.4
2	Atlanta Hartsfield-Jackson Intl	32,818	0.4
3	Dallas/Fort Worth Intl	30,102	0.9
4	Denver Intl	28,034	1.3
5	Guangzhou	23,245	8.9
6	Los Angeles International	22,138	0.6
7	Tokyo Haneda	21,744	4.3
8	Shanghai Pudong International	21,596	5.1
9	Charlotte	21,380	-6.6
10	Istanbul	21,249	7.5
11	Delhi	21,096	9.1
12	Dubai	20,030	5.8
13	London Heathrow	19,988	1.4
14	Phoenix Sky Harbor Intl	19,495	2.3
15	Houston George Bush Intercontinental	18,842	5.3
16	Beijing Capital	18,746	2.1
17	Kuala Lumpur International	18,323	17.5
18	Amsterdam	18,200	-0.8
19	Shenzhen	18,063	2.3
20	New York J F Kennedy International	17,970	0.0
21	Paris Charles de Gaulle	17,962	2.3
22	Jakarta Soekarno-Hatta	17,707	5.2
23	Orlando International	17,681	5.5
24	Miami International	17,661	3.1
25	Madrid Barajas	16,886	2.9

Source: DLR

#### Europe's major hubs show strong upward trend

The largest European airports by number of passenger flights in December 2025 are Istanbul, London Heathrow, Amsterdam, Paris, Madrid and Frankfurt, each with more than 15,000 scheduled departures, most showing an upward trend compared with the previous year.

This table shows the twenty-five largest **European airports**, measured in passenger flights.

Tab. 2: Number of monthly departures at the largest airports in Europe

Rank	Airport	12/2025	Growth rate
1	Istanbul	21,249	7.5
2	London Heathrow	19,988	1.4
3	Amsterdam	18,200	-0.8
4	Paris Charles de Gaulle	17,962	2.3
5	Madrid Barajas	16,886	2.9
6	Frankfurt	15,985	4.4
7	Barcelona	13,131	3.0
8	Rome Fiumicino	12,424	0.9
9	Istanbul Sabiha Gokcen	11,800	11.9
10	Munich	11,409	0.8
11	London Gatwick	9,607	-3.6
12	Zurich	9,550	4.7
13	Copenhagen	9,336	15.7
14	Dublin	9,195	15.5
15	Vienna	8,950	2.6
16	Lisbon	8,939	1.9
17	Athens Intl Eleftherios Venizelos	8,849	6.6
18	Paris Orly	8,504	9.9
19	Moscow Sheremetyevo International	8,431	-1.6
20	Milan Malpensa	7,805	6.0
21	Oslo	7,434	1.2
22	Manchester International	7,399	6.6
23	Warsaw	7,109	7.9
24	Stockholm Arlanda	7,033	20.8
25	London Stansted	6,792	0.3

Source: DLR

# Number of Monthly Departures in December 2025

Tab. 3: Number of monthly departures at the largest airports in Germany

Rank	Airport	12/2025	Growth rate
1	Frankfurt	15,985	4.4
2	Munich	11,409	0.8
3	Berlin	6,758	-0.7
4	Dusseldorf	4,911	2.7
5	Hamburg	3,943	0.3
6	Stuttgart	2,477	5.9
7	Cologne/Bonn	2,076	-2.2
8	Hanover	1,289	4.2
9	Nuremberg	1,115	-0.4
10	Memmingen	859	8.5
11	Dortmund	664	-4.2
12	Bremen	611	-7.3
13	Hahn	491	5.6
14	Karlsruhe/Baden Baden	475	17.3
15	Weeze	443	33.0
16	Leipzig/Halle	346	-20.1
17	Dresden	285	5.9
18	Munster	176	6.0
19	Paderborn	65	-12.2
20	Saarbrücken	53	8.2
21	Friedrichshafen	33	94.1
22	Luebeck	31	----
23	Augsburg	24	----
24	Westerland	19	35.7
25	Hamburg Finkenwerder	19	----

Source: DLR

## German airports: low-cost bases grow

Germany's largest airport is Frankfurt, with around 16,000 departures. With the exception of Berlin and Cologne, all major German airports recorded positive growth rates in December 2025. Airports served predominantly by low-cost carriers, such as Karlsruhe, Weeze and Memmingen, have shown particularly strong growth. Ryanair is expanding its services from Weeze, including increased frequencies to Alicante and Thessaloniki. Smaller airports such as Paderborn have seen a decline in departures. New routes include Belgrade served by Wizz Air from Friedrichshafen, and new Ryanair services from Lubeck, for example to London and Mallorca.

Here, the twenty-five largest **German airports** are listed, measured in passenger flights.

## Ranking by Airlines Globally, for Europe & Germany

Tab. 4: Number of monthly departures by the largest airlines in the world

Rank	Airline	12/2025	Growth rate
1	American Airlines	190,274	4.3
2	Delta Air Lines	148,632	3.0
3	United Airlines	146,549	4.9
4	Southwest Airlines	120,696	1.6
5	Ryanair	80,198	7.3
6	IndiGo Air	72,372	6.1
7	China Southern Airlines	70,770	5.2
8	China Eastern Airlines	69,561	1.4
9	Air China	53,730	4.6
10	LATAM Airlines	51,764	7.6
11	easyJet	46,754	7.4
12	Alaska Airlines	39,325	6.9
13	All Nippon Airways	34,830	7.5
14	Turkish Airlines	34,802	9.0
15	Air Canada	31,304	1.8
16	JetBlue Airways Corporation	27,985	-1.2
17	Lufthansa German Airlines	27,226	-7.4
18	Japan Airlines International	26,336	-1.5
19	British Airways	25,140	1.1
20	AVIANCA	24,334	1.9
21	Azul	24,330	-11.5
22	Hainan Airlines	23,962	1.6
23	Air France	23,722	2.0
24	Qantas Airways	23,143	4.6
25	Gol Transportes Aereos	22,565	15.9

Source: DLR

## Global airlines expand scheduled flight activity

All major airlines worldwide increased their number of scheduled passenger flights in December 2025. American Airlines operates the largest volume, with around 190,300 departures, while Lufthansa ranks 17th with around 27,200 departures and a downward trend. When comparing with the previous year, special factors such as school holidays or public holidays must be taken into account, as they can influence the number of flights in a given month.

This figure shows the **world's** twenty-five **largest airlines**, measured in passenger flights.

# Number of Monthly Departures in December 2025

## Ranking by Airlines Globally, for Europe & Germany

### Ryanair strengthens its leading position in Europe

Ryanair offers the largest number of flights in Europe in December 2025, with more than 77,600 departures, representing growth of 6.9% compared with the previous year. This is significantly more than easyJet, which ranks second with around 44,800 departures.

The twenty-five **airlines in Europe** with the most passenger flights from European airports are listed here.

### Lufthansa remains Germany's largest carrier despite restructuring

The airline with the largest number of flights in Germany is Lufthansa, with around 16,600 departures in December, followed by Eurowings with almost 5,000 and Ryanair with around 3,800 departures. The decline at Lufthansa can be partly attributed to a shift of services to its new subsidiary, Lufthansa City Airlines. While Lufthansa is significantly reducing its own flight offering—such as cutting domestic feeder services like Berlin–Frankfurt—subsidiaries and partner airlines such as City Airlines and Brussels Airlines are expanding significantly. easyJet is increasing frequencies in Hamburg and Munich, while Condor is expanding in Berlin and Frankfurt.

This table ranks the twenty-five **airlines** that offer the most passenger flights in **Germany**.

Tab. 5: Number of monthly departures by the largest airlines in Europe from European airports

Rank	Airline	12/2025	Growth rate
1	Ryanair	77,626	6.9
2	easyJet	44,774	6.9
3	Turkish Airlines	28,440	7.4
4	Lufthansa German Airlines	24,815	-8.7
5	British Airways	21,831	1.0
6	Air France	20,068	1.7
7	KLM-Royal Dutch Airlines	19,372	-1.2
8	SAS Scandinavian Airlines	19,256	36.7
9	Pegasus Airlines	18,097	13.2
10	Iberia	17,263	-0.1
11	Vueling Airlines	16,911	-0.3
12	Aeroflot Russian Airlines	15,950	-2.1
13	Wizz Air	13,534	23.3
14	Wizz Air Malta	13,230	17.3
15	Ajet	11,400	8.8
16	Wideroe's Flyveselskap	9,830	4.2
17	Swiss	9,631	-6.4
18	Finnair	9,251	6.0
19	Austrian Airlines AG	8,690	1.9
20	ITA Airways	8,679	-10.4
21	Eurowings	8,589	-0.1
22	Aegean Airlines	8,380	10.3
23	LOT - Polish Airlines	8,346	2.9
24	TAP Air Portugal	8,143	0.7
25	Binter Canarias	7,980	6.8

Source: DLR

Tab. 6: Number of monthly departures by the largest airlines in Germany from German airports

Rank	Airline	12/2025	Growth rate
1	Lufthansa German Airlines	16,563	-7.5
2	Eurowings	4,961	-1.1
3	Ryanair	3,823	2.3
4	Condor Flugdienst	1,940	64.8
5	Air Dolomiti	1,925	4.2
6	easyJet	1,655	21.9
7	KLM-Royal Dutch Airlines	1,283	-8.5
8	Lufthansa City Airlines	1,153	94.4
9	British Airways	1,135	-0.5
10	Austrian Airlines AG	1,133	-5.0
11	SunExpress	1,066	0.7
12	Turkish Airlines	1,053	6.9
13	Pegasus Airlines	1,011	8.6
14	Wizz Air	991	30.2
15	Air France	886	-1.4
16	Wizz Air Malta	825	16.5
17	Swiss	775	-5.1
18	Eurowings Discover	742	15.8
19	SAS Scandinavian Airlines	676	50.2
20	TUIfly	561	0.7
21	United Airlines	497	1.6
22	Aegean Airlines	450	8.2
23	Brussels Airlines	442	44.4
24	Iberia	423	-3.6
25	LOT - Polish Airlines	422	-6.8

Source: DLR

# Air Transport Development in December 2025

## Development and Changes Globally and for Germany

### Global and German Air Traffic Trends in December 2025

The following diagrams show the development of global and German flight capacity over the last fifteen months, both worldwide and in the individual region.

#### Fig. 1-2: **Global air traffic grows modestly; Middle East surges**

In December 2025, the number of scheduled passenger flights worldwide increased by around 3.3% compared with the previous year, reaching 3.2 million departures. The regions with the highest volumes are Asia, North America and Europe. Most regions recorded growth of around 2–4%, while the Middle East experienced an increase of around 9.5%.

#### Fig. 3-4: **Germany increases capacity, with strong focus on Middle East and Europe**

In Germany, around 54,600 scheduled departures in passenger air traffic will be operated in December 2025, representing growth of 2.2% compared with the previous year. While flight offerings to the Middle East are being expanded, there are reductions in services to North and South America. Around 46,200 flights are scheduled to European airports.

Fig. 1: **Development** of the **global air transport supply**

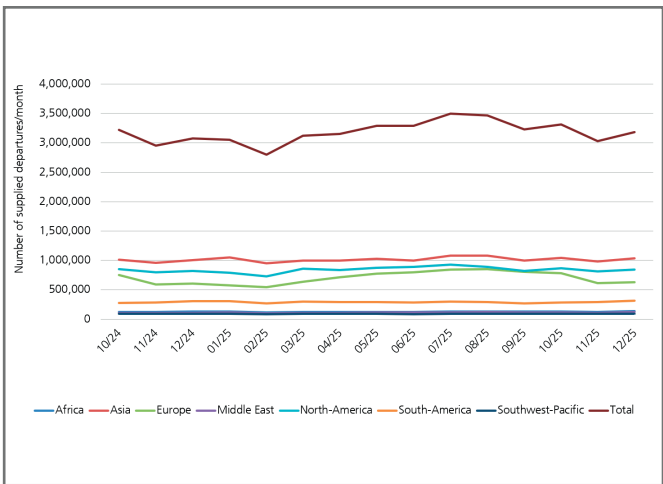


Fig. 2: **Changes** in the global air transport supply

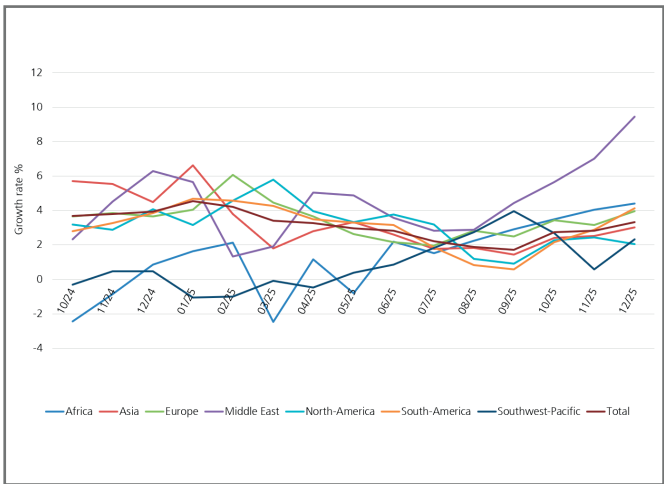


Fig. 3: **Development** of the **German air transport supply**

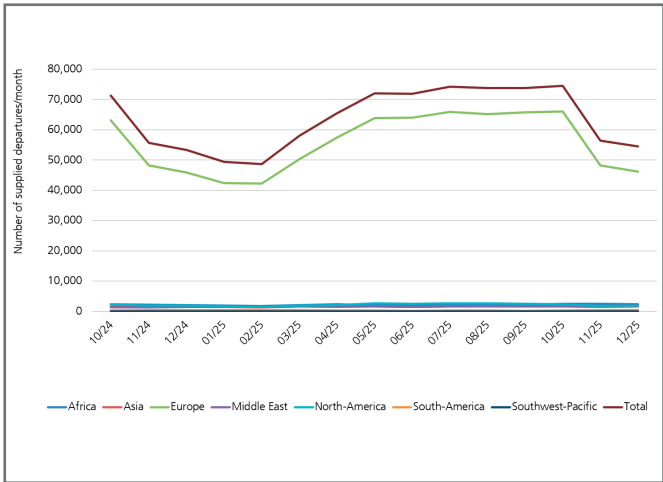
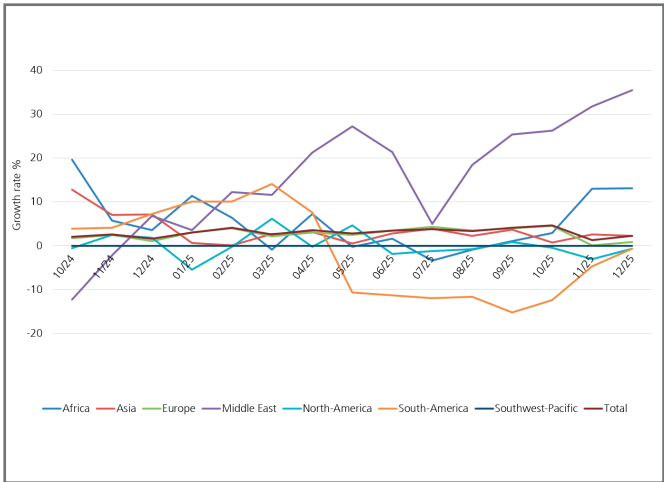


Fig. 4: **Changes** in the German air transport supply



Source: OAG 2024-2025, DLR 2024-2025

## DLR Overview

The DLR is the research center of the Federal Republic of Germany for aerospace. We conduct research and development in aviation, space, energy, transportation, security, and digitalisation. The German Space Agency at DLR is responsible, on behalf of the Federal Government, for planning and implementing German space activities. Two DLR project agencies manage funding programmes and support knowledge transfer.

Climate, mobility, and technology are changing globally. The DLR utilises the expertise of its 54 institutes and facilities to develop solutions for these challenges. Our more than 11,000 employees have a common mission: we explore Earth and space and develop technologies for a sustainable future. In doing so, we contribute to strengthening Germany's knowledge and economic base.

## DLR Institute of Air Transport

The DLR Institute of Air Transport researches the complex interactions within the air transport system. We develop future scenarios, conduct economic and business analyses, and model and simulate flight and fleet operations.

We forecast, shape, and evaluate air transport as part of the overall transport system to enhance climate compatibility and performance. To achieve this, we integrate ecological, economic, technological, and social aspects of air transport.

Within DLR, we consolidate expertise in analysing air transport markets and assessing the entire value chain. This positions us as a competent partner for industry, society, and policy makers.

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