

# ERA Monthly Market Analysis

## September 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 coming to it's close, we see a healthy increase in available seats and flights offered compared to September 2024.

The two headline figures are a 7.6% increase in available seats and 4.6% increase in flights offered in Sep 25 compared to the same month last year.

Comparing flights offered in Sep 2019 to Sep 2025 we still see a decrease of -16.5% (108,407 vs 90,493).

Average aircraft seating capacity was 92 seats with sector duration at 1hr 22mins for Sep, both in line with the ERA trends across the last 12 months.

Stage length was 736km which is a -0.3% decrease compared to the same month last year.

Unique routes operated shows a 9.8% increase compared to Sep 24.

Published schedules for Winter 25/26 (November-April) indicate an increase of 3.8% in total seats and an increase of 4.4% in total flights offered compared to Winter 24/25.

These figures may change as carriers update their schedules.

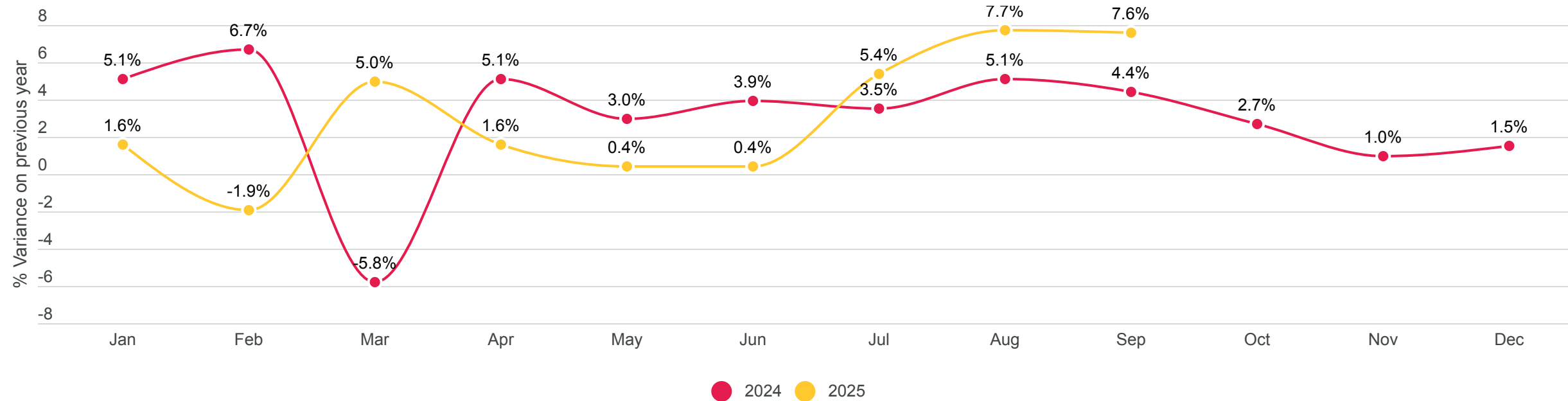
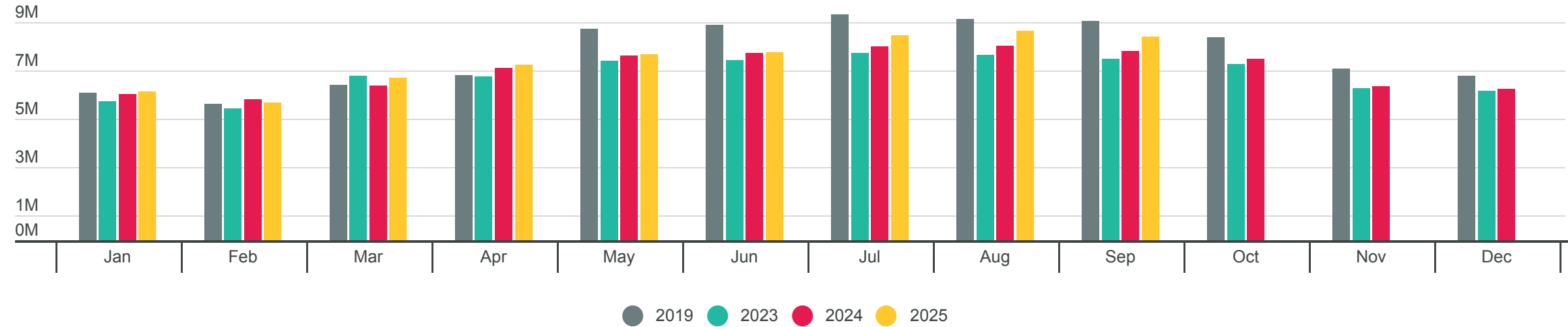
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# Deployed Capacity

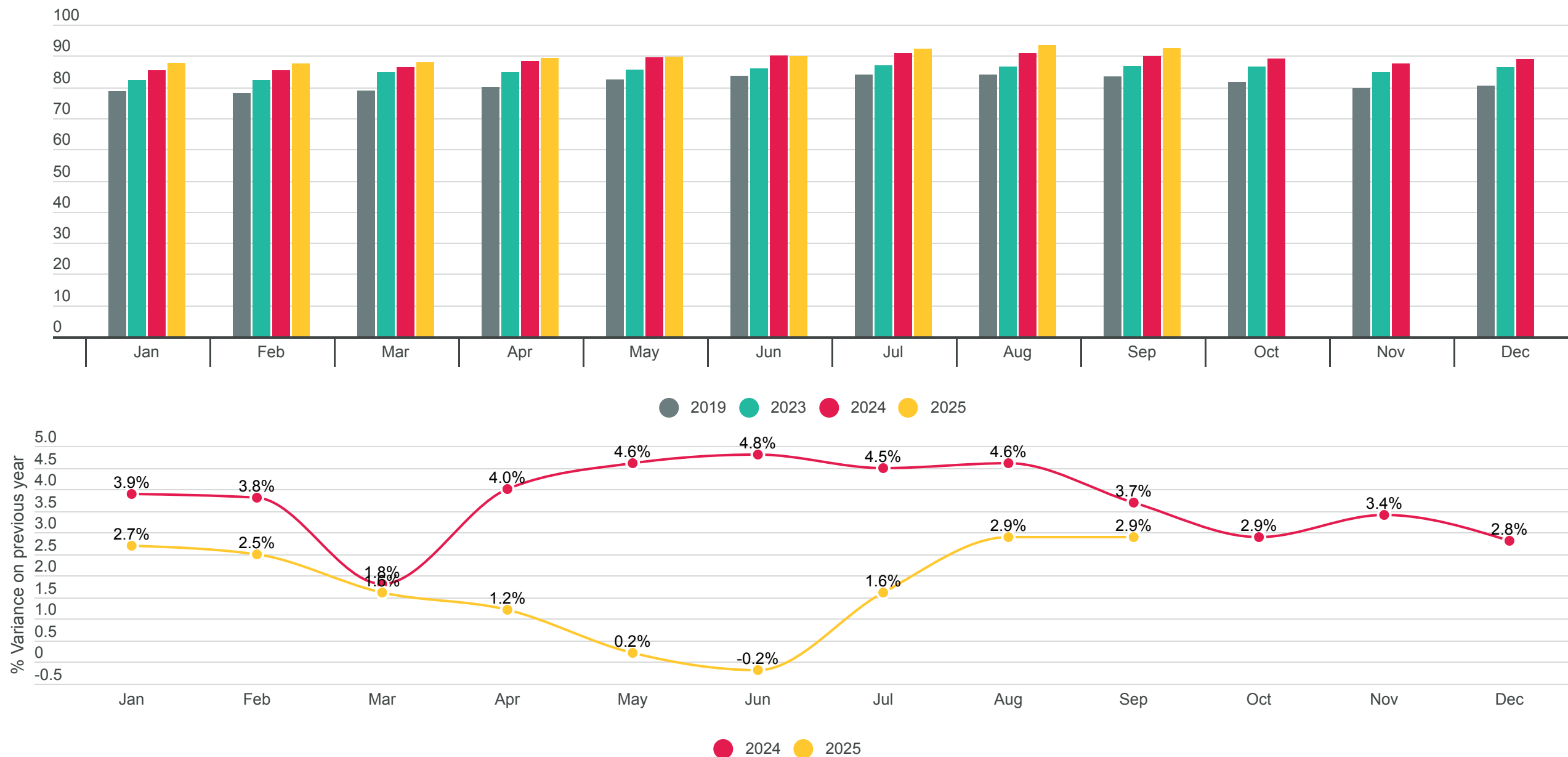
Scheduled seats by ERA carries Jan-Dec 2025

## Total Seats



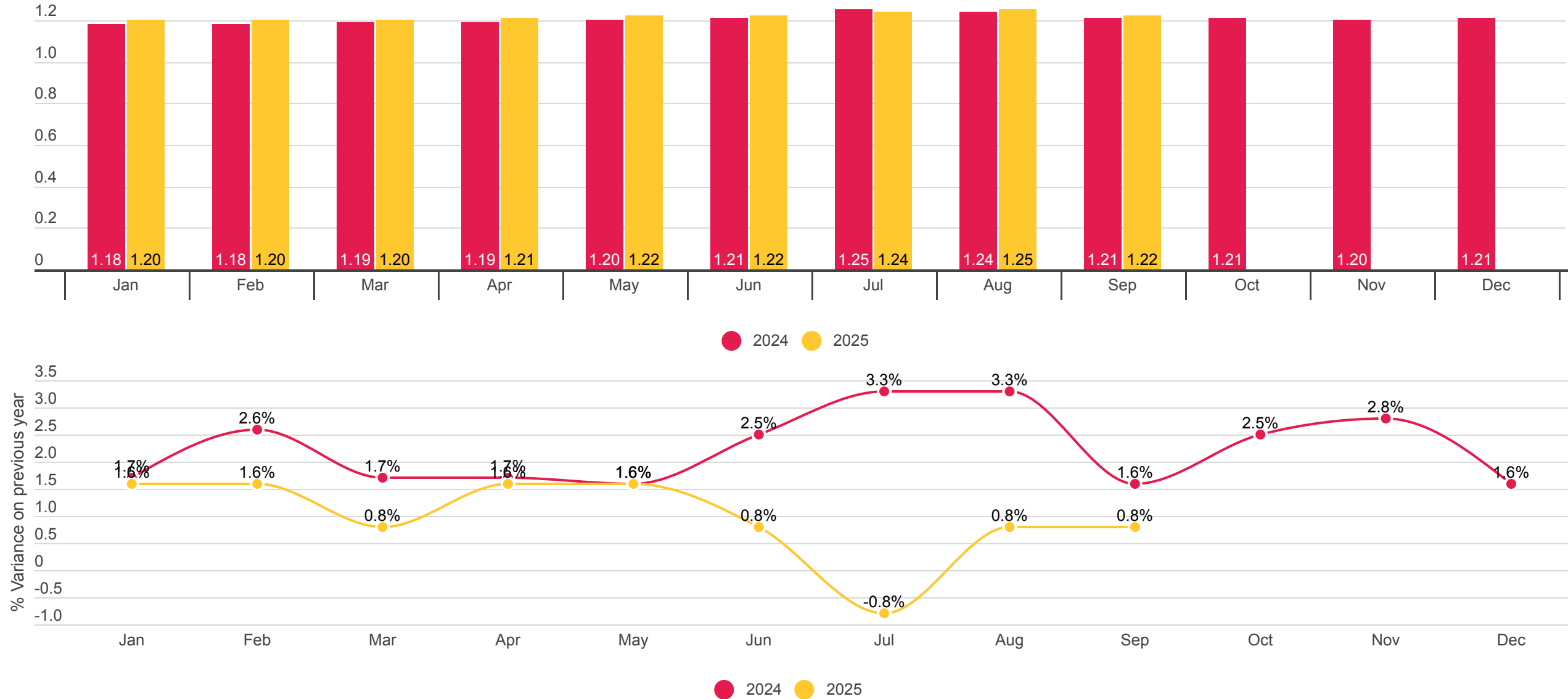
# Aircraft Seating Capacity

Average seats per departure



# Sector Duration

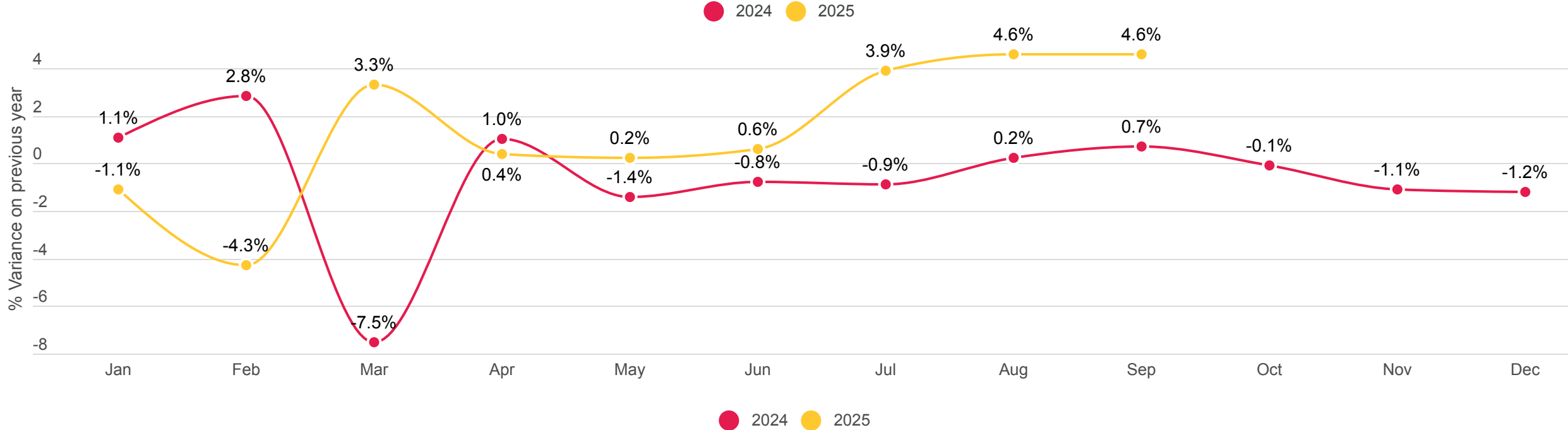
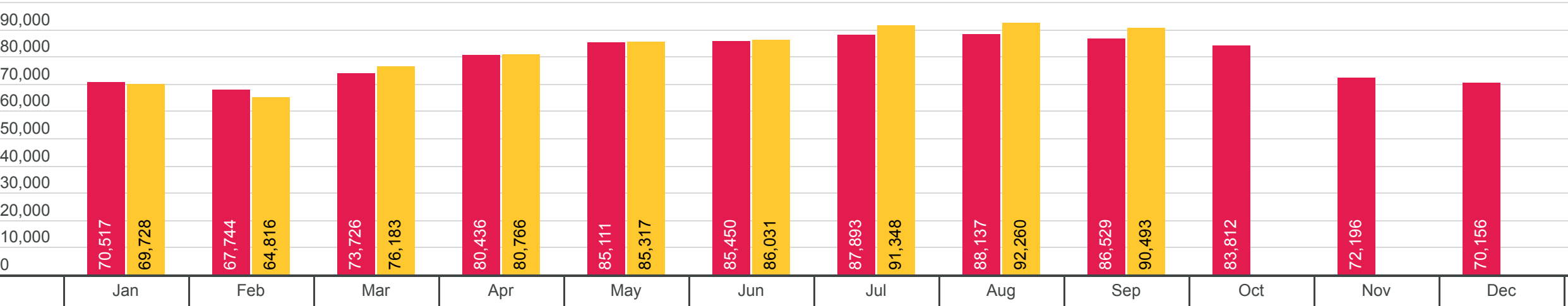
Average sector duration in hours





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# Total Movements



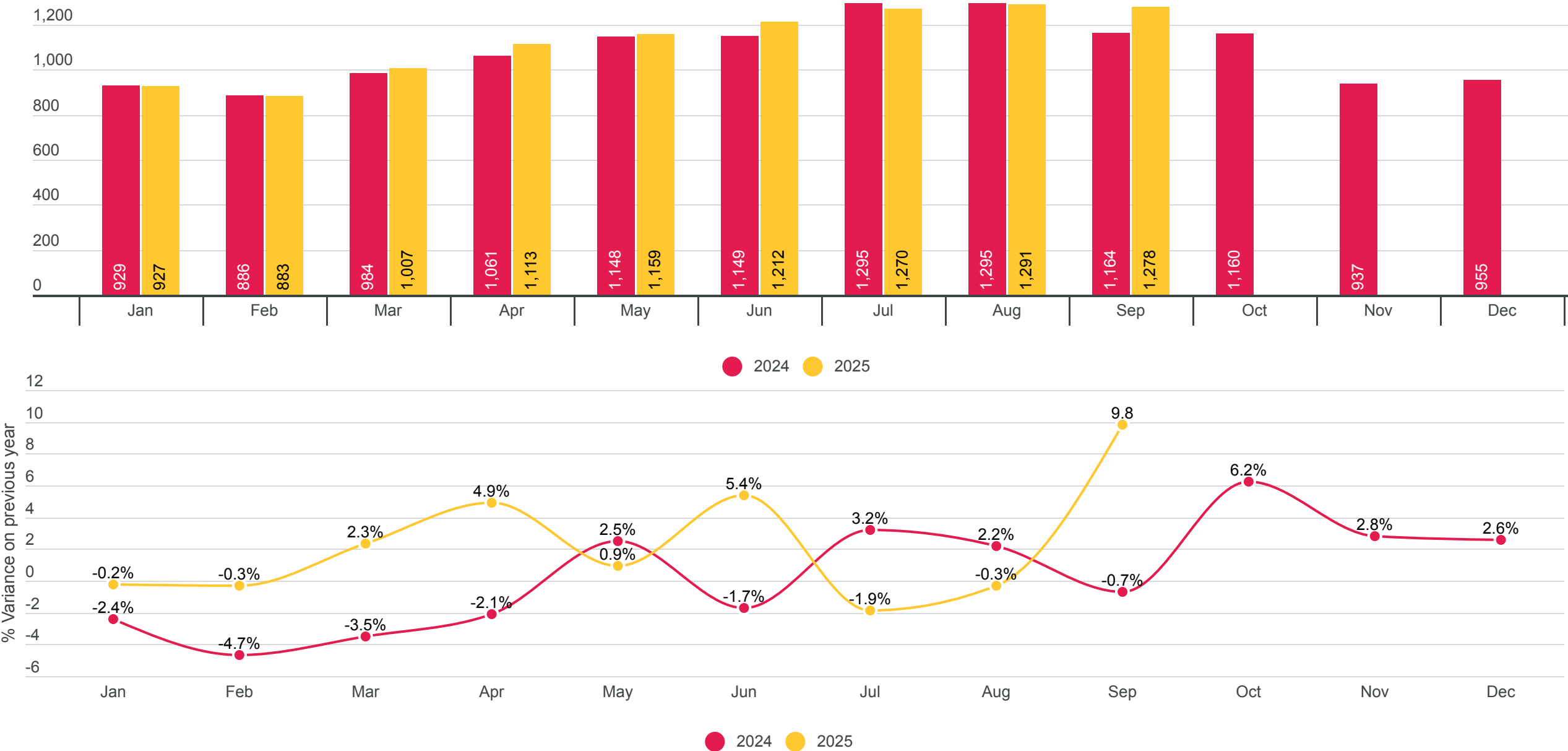
2019 shown as a benchmark against the last 3 years of data for deployed capacity, aircraft seating and stage length



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# Route Count

Unique Routes Operated By ERA Member Airlines



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

# Stage Length

Average stage length in kilometres (km)

