

ERA Monthly Market Analysis

December 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 Winter schedule ongoing, we see an increase in available seats and flights offered compared to December 2024.

The two headline figures are a 7.5% increase in available seats and 5.5% increase in flights offered in Dec 25 compared to the same month last year.

Average aircraft seating capacity was 90 seats with sector duration at 1hr 22mins for Dec, both in line with the ERA trends across the last 12 months.

Stage length was 714km which is a 2.9% increase compared to the same month last year.

Unique routes operated shows a 2.2% increase compared to Dec 24.

Published schedules for Winter 25/26 (November-April) indicate a reduction of 0.1% in total seats and an increase of 0.2% in total flights offered compared to Winter 24/25.

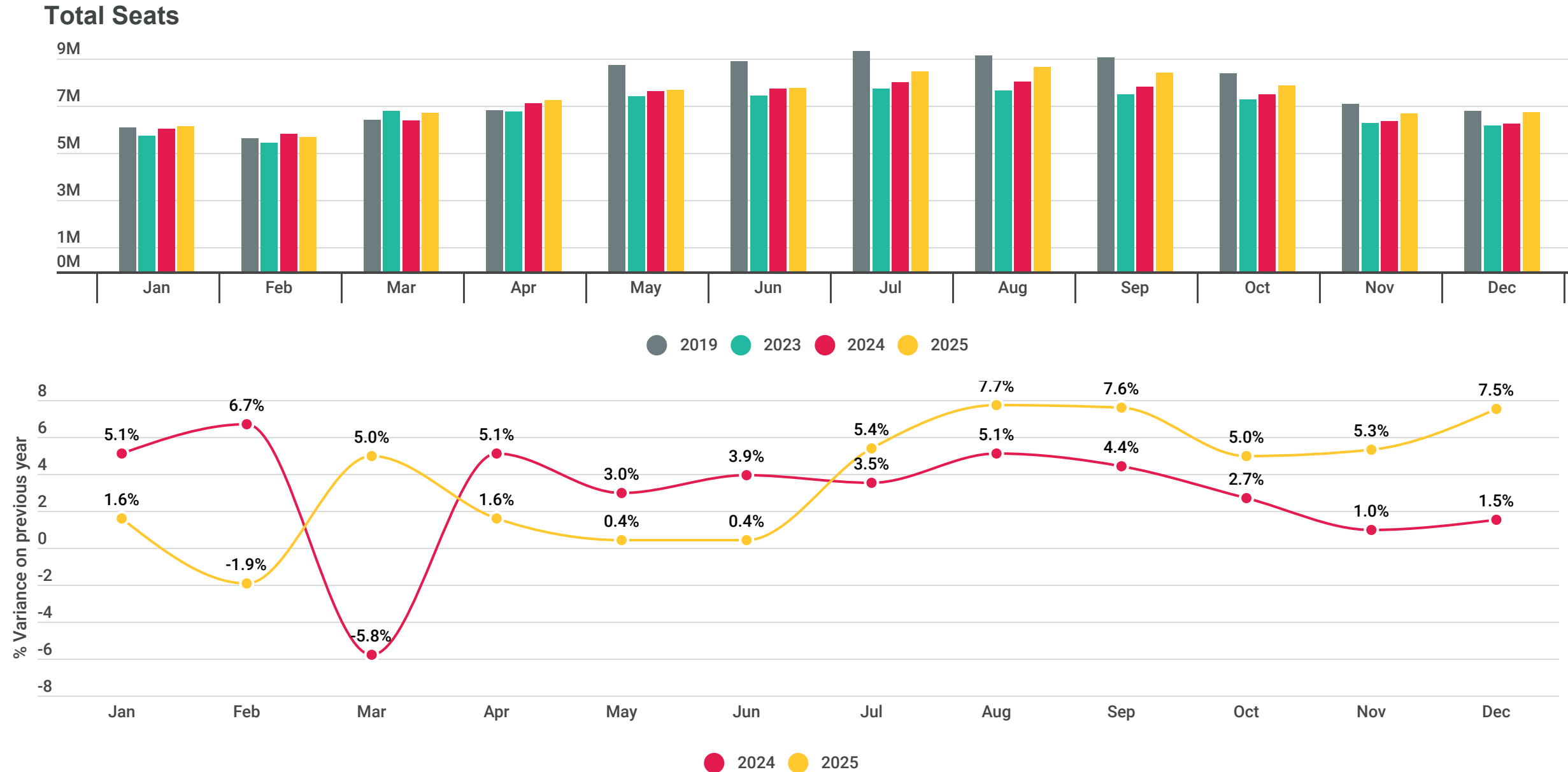
These figures may change as carriers update their schedules.

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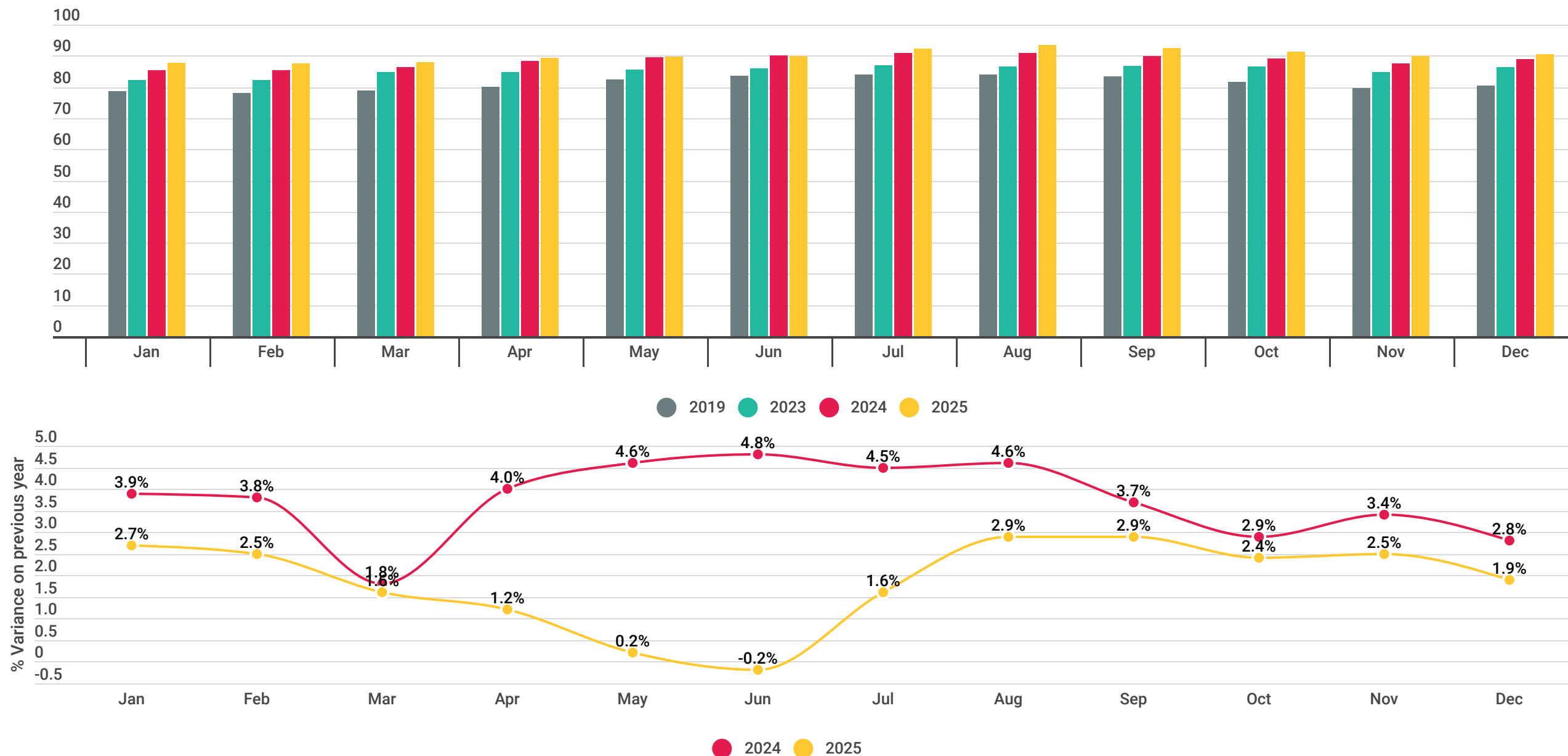
Deployed Capacity

Scheduled seats by ERA carries Jan-Dec 2025



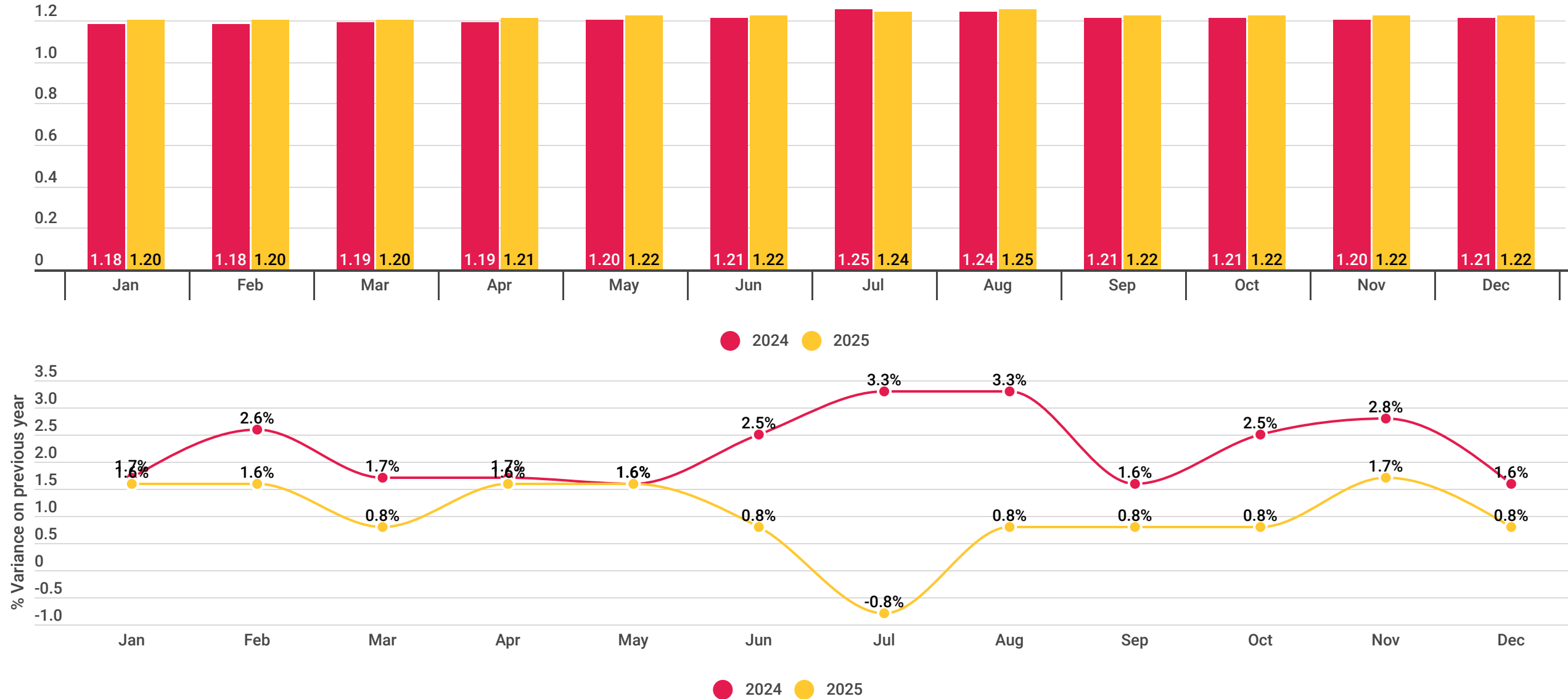
Aircraft Seating Capacity

Average seats per departure



Sector Duration

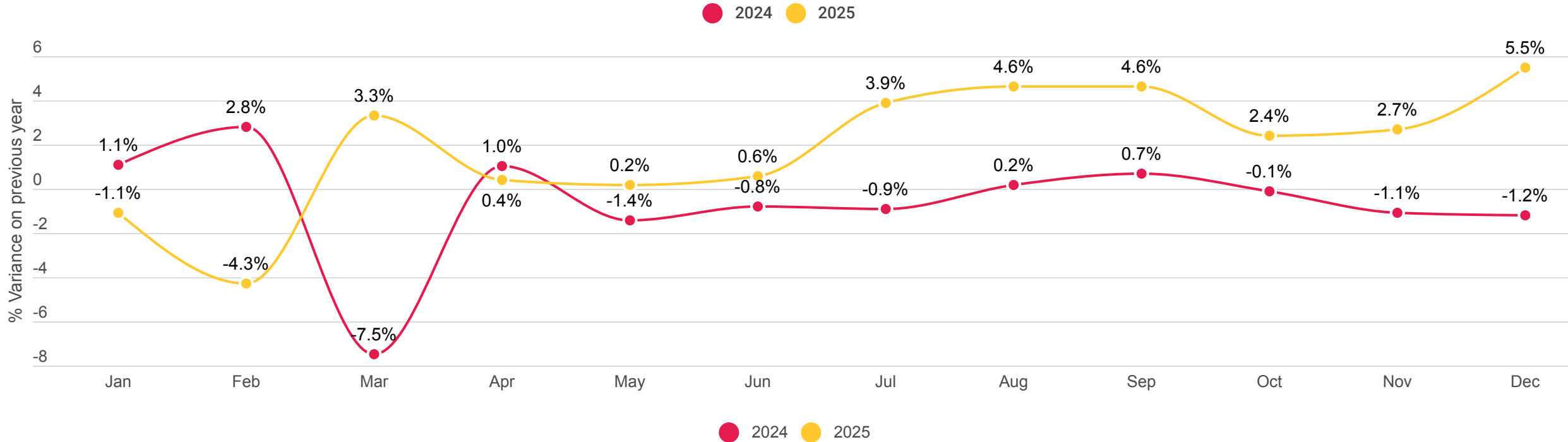
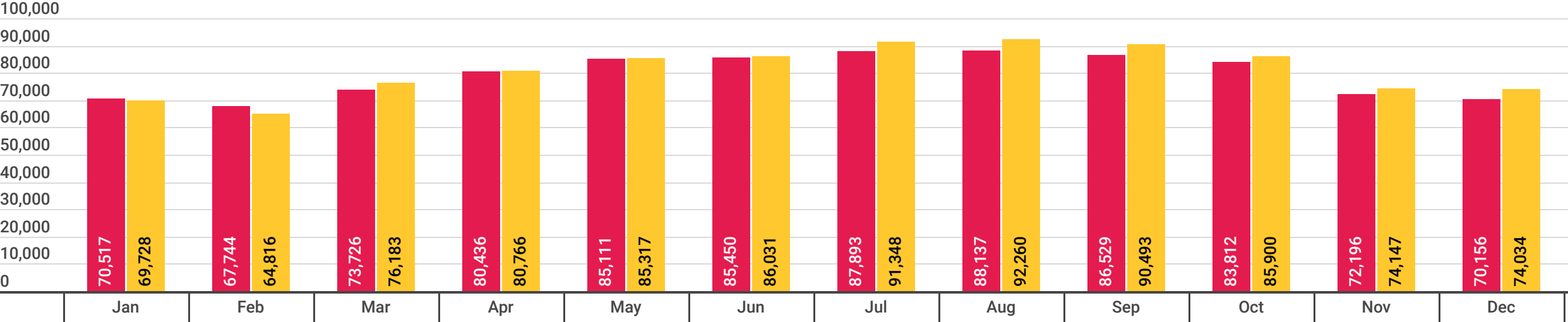
Average sector duration in hours





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Total Movements



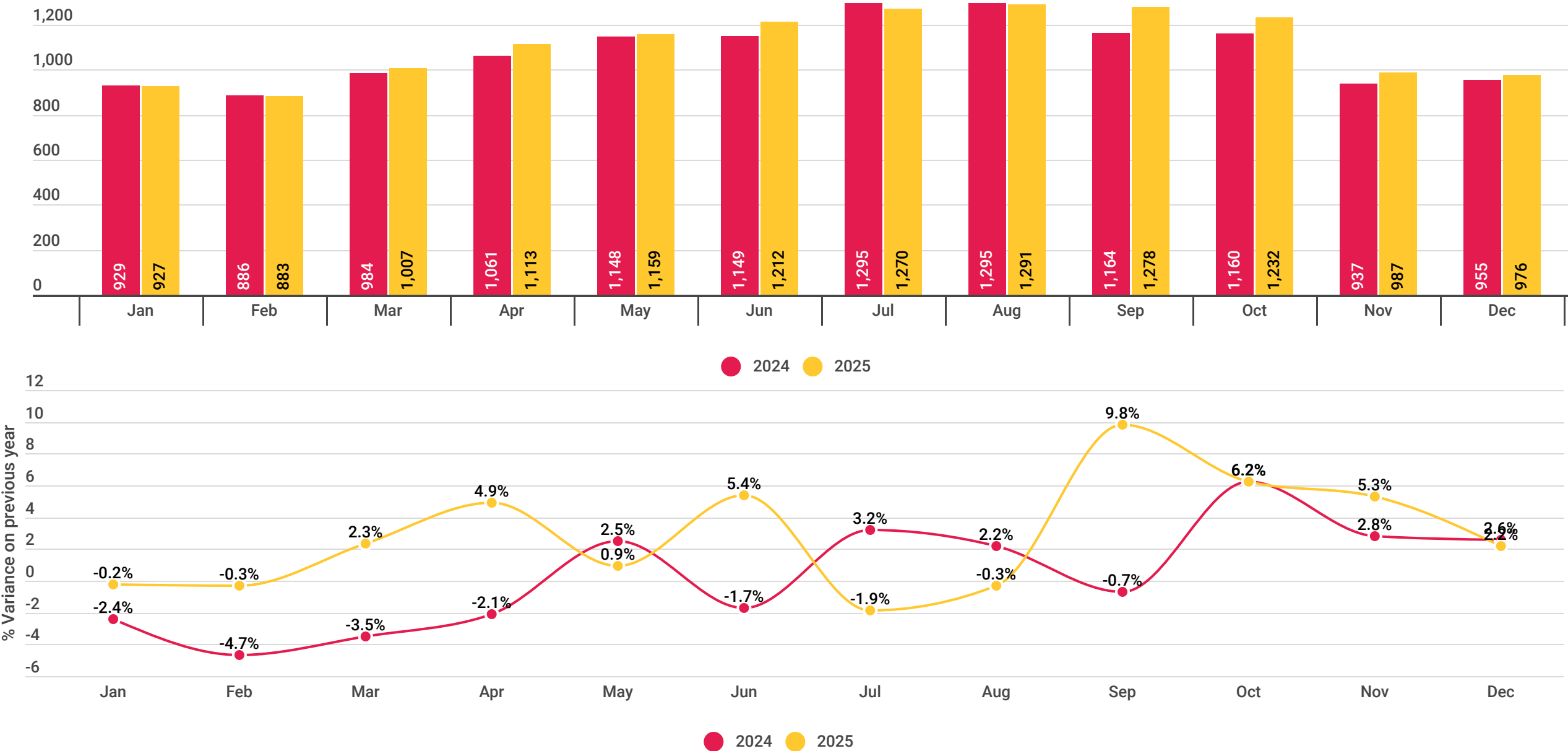
2019 shown as a benchmark against the last 3 years of data for deployed capacity, aircraft seating and stage length



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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)

