Air & Sea Access
Planned Capacity for Summer 2025 (30th March - 25th October)

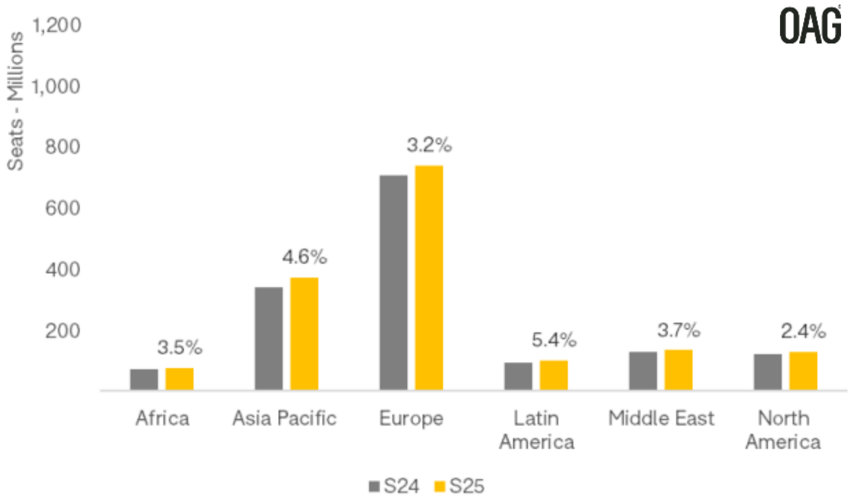
Fáilte Ireland

Overview of Summer Air Capacity

Global Air Travel

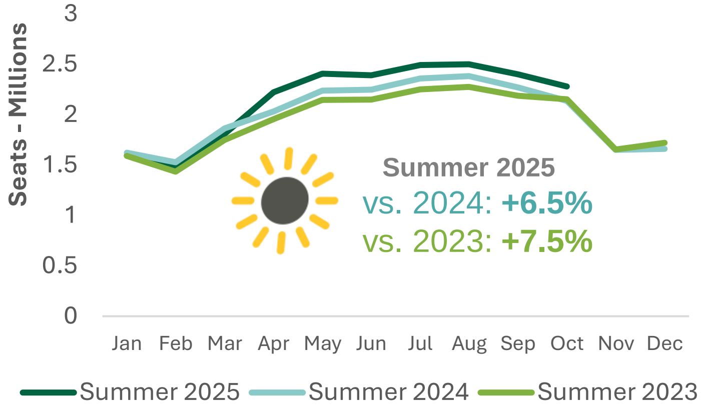
- Air capacity this summer is expected to be 3% ahead of 2024 globally.
- International capacity growth is also up by +3% in Europe.
- As of the end of March, scheduled capacity to Europe for Summer 2025 accounted for 48% of total US outbound capacity with growth in Mediterranean countries as well as in Ireland.

International Capacity by World Region 2025 vs. 2024



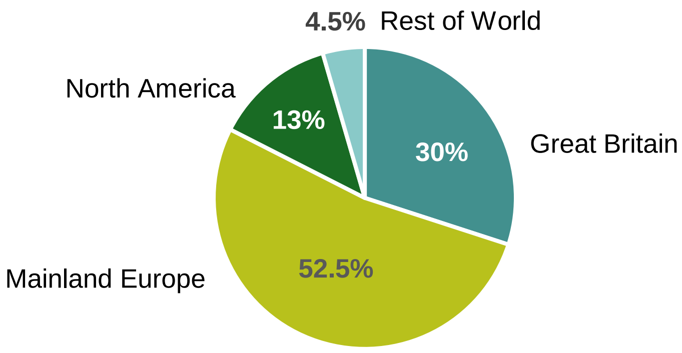
Summer Air Access to Republic of Ireland (ROI)

2025 Seat Capacity to ROI vs. 2023 & 2024



- As of April 7th, summer seat capacity to ROI is expected to increase by **6.5%** vs. Summer 2024, to 16.5K seats.
- Year-on-year growth is strongest between April and June, with the timing of Easter boosting the number of seats available in April 2025.
- The share of seats from **North America** has been one of the fastest growing among the main market areas since 2023, now accounting for **13%** of all seats to ROI and driven by US market seats.

Share of Seats by Main Market Area



Change in Capacity by Main Market vs. 2024

Main Market Area	Change vs. Summer 2024
Great Britain	+6%
Mainland Europe	+5%
North America	+11%
Rest of World	+18%
All Markets	**+6.5%**

Source: OAG *(as of May 5th 2025)*

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Summer Access to Republic of Ireland (ROI): Capacity by Key Market

Summer Air Access from ROI's Key Markets

- Despite an increase in capacity from GB this summer (+6% vs. 2024), the number of scheduled seats over the season remains lower than in Summer 2023 (-2%).

- Capacity from the US is up +11% this summer, the largest growth among ROI's key source markets, providing 1.8M seats across the summer season.
- There are five airlines operating 25 routes between the US and Ireland, an increase of 3 routes since last summer.

- Seat capacity from France to ROI had been growing since 2022 but is set to be down -3% this summer.
- The decrease in seats (net loss of 27K seats) is mainly driven by the reduction in capacity from Ryanair (-10%, equating to 44K seats).

- Capacity from Germany is up +3% compared to last summer. However, similar to GB, the number of scheduled seats remains below its Summer 2023 levels (-2%).

Summer Sea Access to ROI

- Sea access to ROI this summer is expected to be lower than Summer 2024 and 2023.
- An estimated 3.261-million-passenger capacity is scheduled over the summer season, 88% of which is on Cross Channel routes.
- The decrease in passenger capacity is due to several factors including downsizing of vessels and some vessels no longer operating on certain routes.

Weekly Summer Passenger Capacity to ROI by Sailing Corridor

Corridor	One-way Weekly Sailings	One-way Weekly Passenger Capacity
Cross Channel	94	96,100
Continental	16	13,350
All	**110**	**109,450**

Source: Ferry operators

For more detail on the Inbound Air & Sea Access dashboard: **click here**

Source: OAG *(as of May 6th 2025)*

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Summer Capacity to ROI by Key Source Market 2025 vs. 2024 – Excluding Scheduled Seats on Sun Routes

Summer Access to ROI

83% of scheduled access to Ireland comes from **air capacity**.

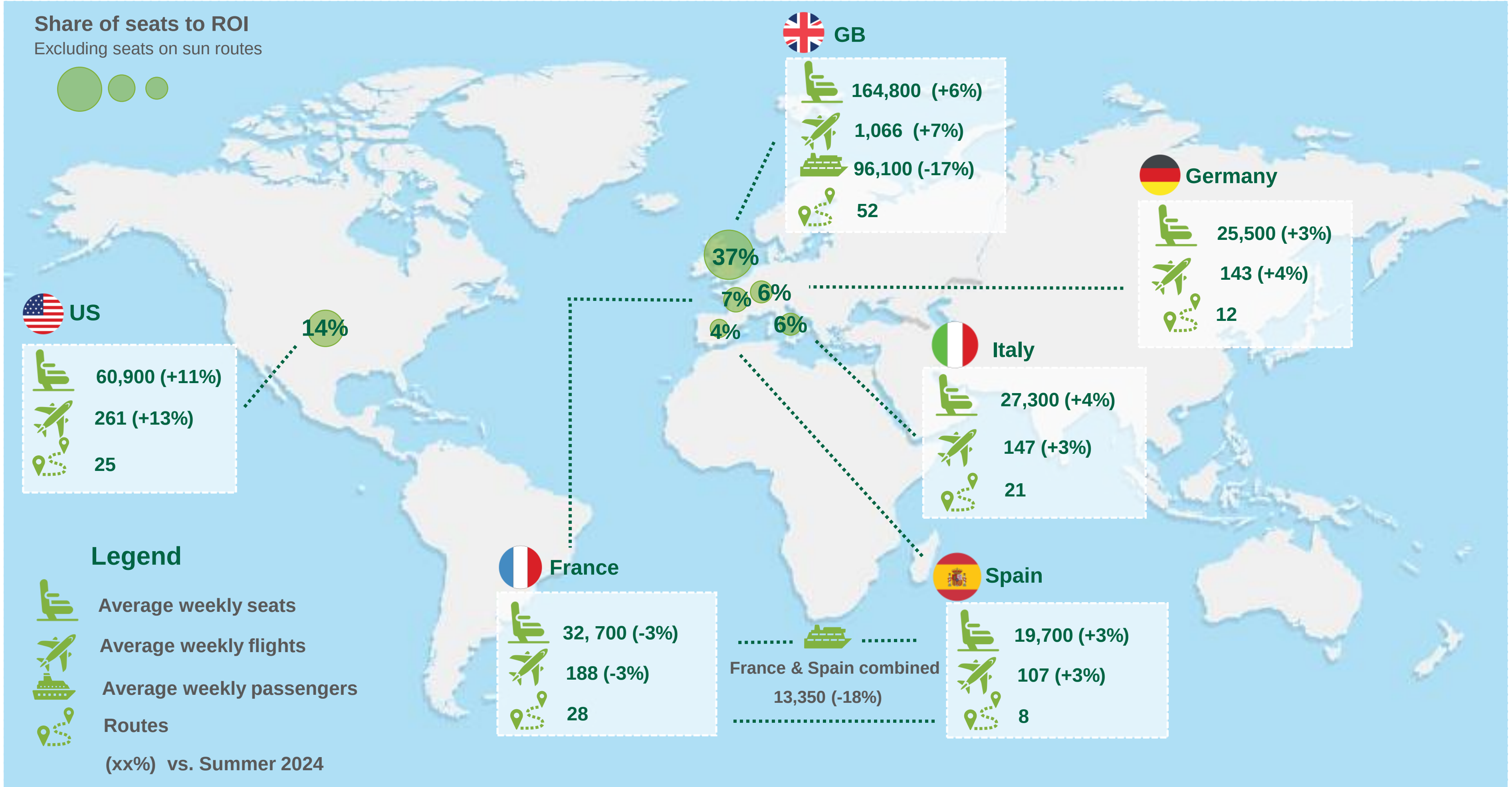
19% of air capacity is scheduled on **sun routes** and is therefore more directed towards domestic outbound travel (this is excluded from the map).

445,900
Average weekly seats

2,515
Average weekly flights

109,450
Average weekly passengers

296
Routes



Source: OAG *(as of May 6th 2025)*