Air & Sea Access
Planned Capacity for Winter 2025/26 (Nov 2025 – Mar 2026)

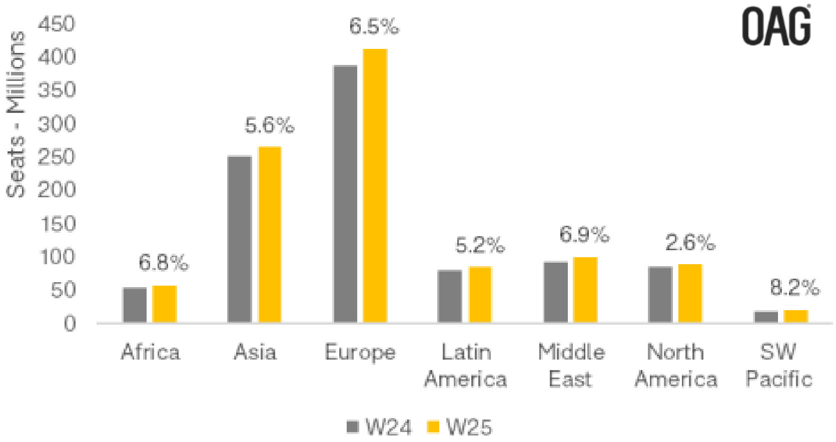
Fáilte Ireland

Overview of Winter Air Capacity

Global Air Travel

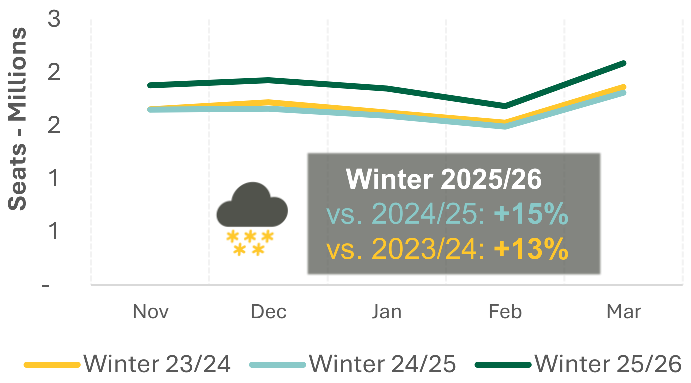
- The growth in seat capacity globally in 2025 currently stands at 3% above 2024 levels. This is in line with previous annual growth rates.
- Although capacity growth has been steady throughout the year, there are notable seasonal and regional variations.
- International seat capacity this coming winter is set to be 6.5% higher than last winter in Europe while North America is expected to grow more slowly at 2.6%.

International Winter Capacity: YoY Growth by World Regions



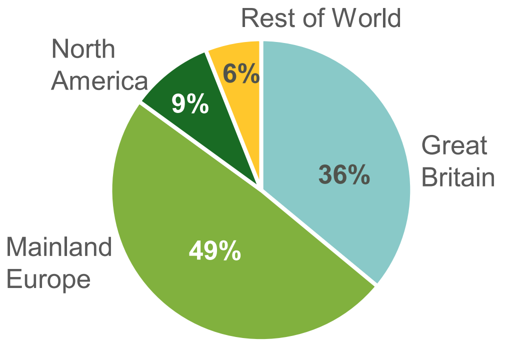
Winter Air Access to Republic of Ireland (ROI)

Winter Seat Capacity to ROI: YoY Change



- Air access to ROI in 2025 is set to be +6% higher than in 2024.
- And with no passenger cap at Dublin airport this coming winter, the growth in seat capacity is expected to be +15% above last winter season's levels with close to 10 million scheduled seats to ROI.
- The growth is due to happen across all key markets and across all winter months.

Share of Seats by Main Market Area



YoY Change in Capacity by Main Market Area

Main Market	Change vs. Winter 2024/25
Great Britain	+11%
Mainland Europe	+16%
North America	+15%
Rest of World	+37%
All Markets	**+15%**

Source: OAG, November 2025

Air & Sea Access
Planned Capacity for Winter 2025/26 (Nov 2025 – Mar 2026)

Fáilte Ireland

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

Winter Air Access to ROI

GB accounts for 36% of seat capacity to ROI this winter and is due to grow its access by +11% compared to Winter 2024/25.

After strong growth throughout the summer, capacity from the **US** is also expected to be higher than the past two winter seasons. All four airlines operating to Irish airports have scheduled more seats this winter. Aer Lingus, which accounts for 72% of US capacity, plans a +8% increase in seats to ROI.

While seat capacity from **France** is due to be +10% above last winter levels, it has decreased by -2% since Winter 2023/24. This is mainly due to Ryanair reducing its capacity on France to ROI routes (-22%).

Seat capacity from **Germany** is due to grow by +14% compared to last winter. It remains, however, -7% below pre-pandemic capacity levels when Ryanair offered an extra 55,000 seats to ROI.

Winter Sea Access to ROI

- Capacity on ferries sailing to ROI in Winter 2025/26 has increased for this winter compared to the past two winters.
- The +9% growth in passenger capacity can be observed on both Cross Channel and Continental sailing corridors.

Weekly Winter Passenger Capacity to ROI by Sailing Corridor

Corridor	One-way Weekly Passenger Capacity	Change vs. Winter 2024/25
Cross Channel	96,700	+7%
Continental	11,800	+27%
All	**108,500**	**+9%**

Source: Ferry operators, September 2025

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

Source: OAG, November 2025

Air & Sea Access
Planned Capacity for Winter 2025/26 (Nov 2025 – Mar 2026)

Fáilte Ireland

Winter Capacity to ROI by Key Source Market: YoY Change – Excluding Scheduled Seats on Sun Routes

Winter Access to ROI

81% of scheduled access to Ireland comes from **air capacity**.

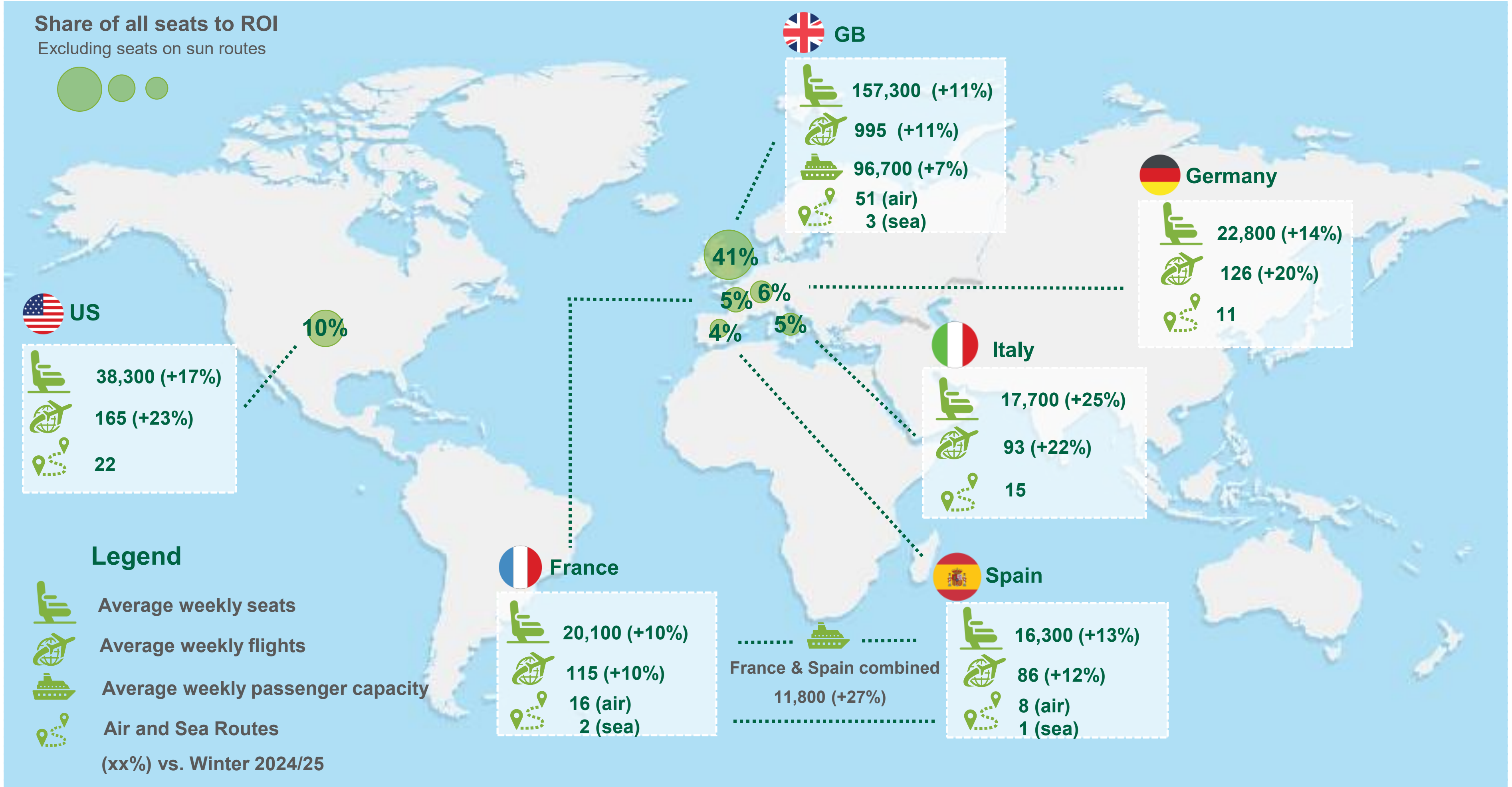
12% of air capacity is scheduled on **sun routes** and is therefore more directed towards domestic outbound travel (this is excluded from the map).

384,200
Average weekly seats

2,154
Average weekly flights

108,500
Average weekly passenger capacity

197 air and **6** sea
Routes



Source: OAG, November 2025