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EUROPEAN AVIATION OVERVIEW

21-27 Oct 2024

Wednesday 30 October 2024

Headlines

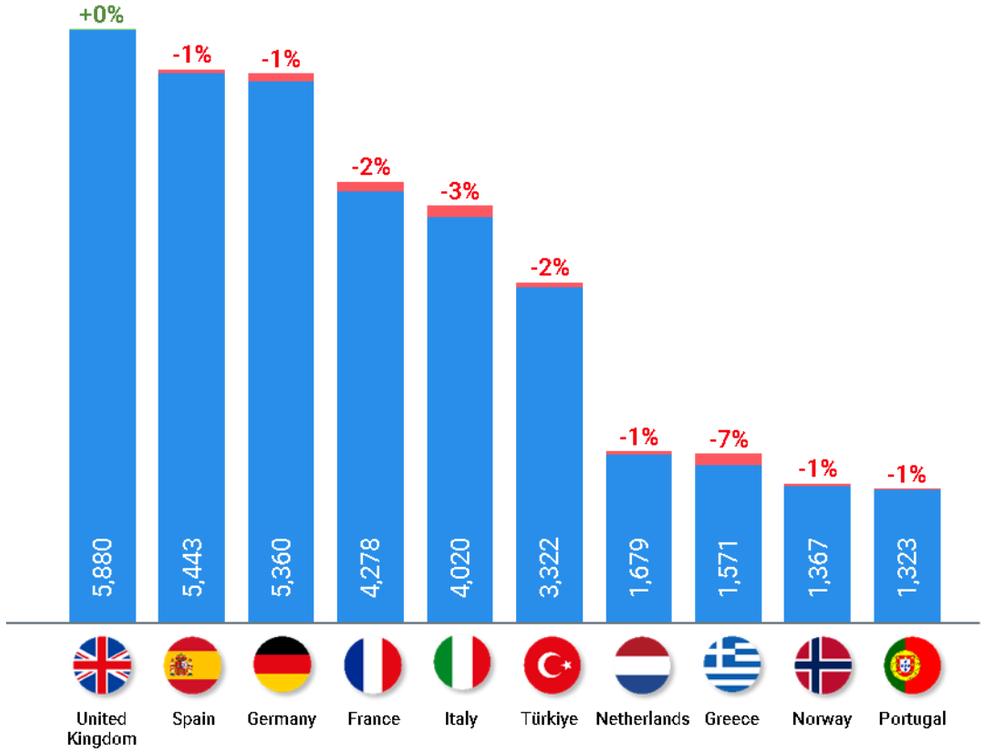
(Week 21-27 Oct 2024)

- For the last week of the Summer schedules, the network recorded 30,908 average daily flights (+5% vs 2023).
- With the end of the Summer, the top 10 States have recorded less traffic (-1.5%) compared to the previous week's average.
- Network traffic (flights) for October is at 98% of 2019 levels. Locally, the situation is more diverse.
- Year-to-date traffic is 96% of 2019, 5% more than 2023.
- A EUROCONTROL forecast update has been published which expects the number of flights across the Network as a whole to reach 2019 levels during Summer 2025.
- En-route ATFM delays were slightly higher than in the previous week (+2%), with an average of approximately 48,000 daily minutes. This is 46% higher than in 2023 and represents, on average, 1.55 min/flight.
- ATC capacity/staffing was the top delay cause last week (76% of all en-route ATFM delays), followed by convective weather (16%).
- The average jet fuel price was at 2.16 USD/gallon on 25 October 2024, a 4% decrease over two weeks.
- Passenger numbers at the top 40 airports over the June-to-August 2024 period reached 409 million, a +6% increase on same period in 2023. This corresponds to 101% of pre-pandemic (2019) levels.

Top 10 busiest States

On week 21-27 Oct 2024

(all flights excl. overflights compared with previous week)



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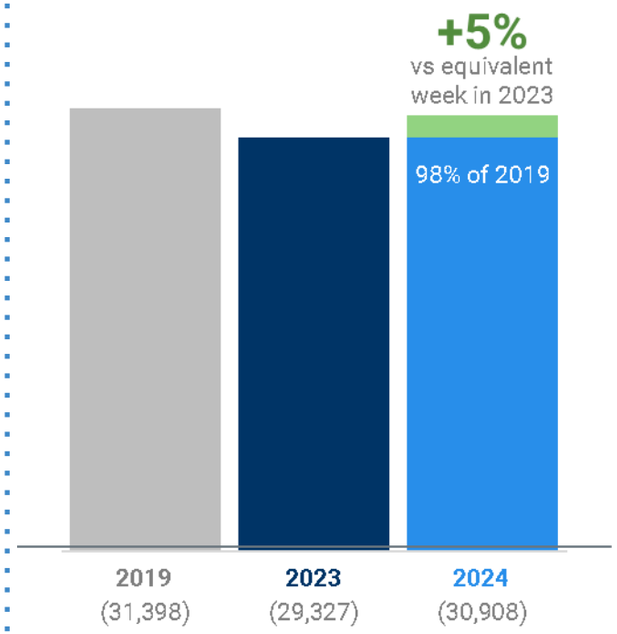
Traffic situation

Average daily flights (including overflights)

Week 21-27 Oct 2024



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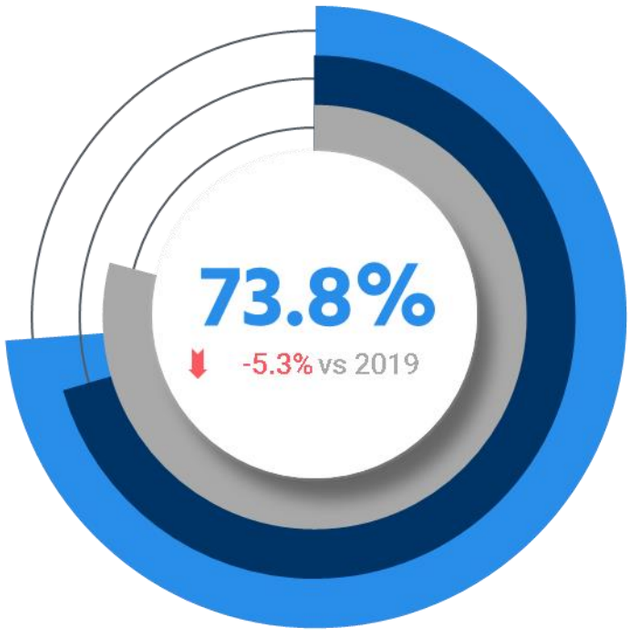
Arrival & departure punctuality

(all network scheduled flights)

Week 21-27 Oct 2024

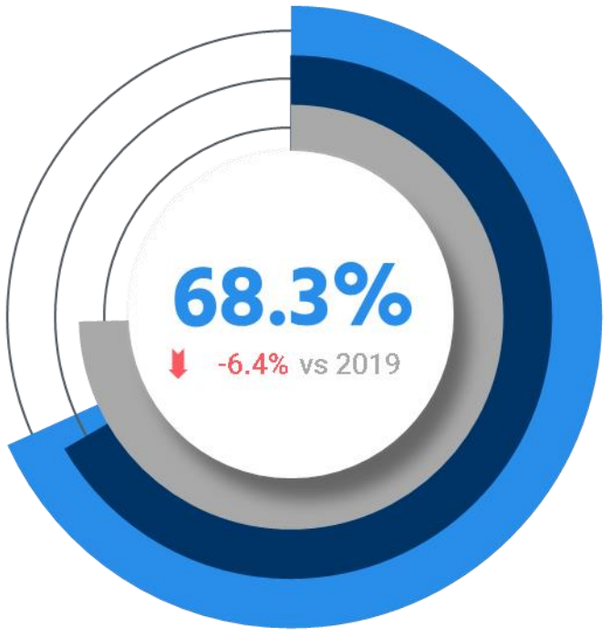
ARRIVAL PUNCTUALITY



79.1% _____ in 2019

70.5% _____ in 2023

DEPARTURE PUNCTUALITY



74.7% _____ in 2019

66.6% _____ in 2023

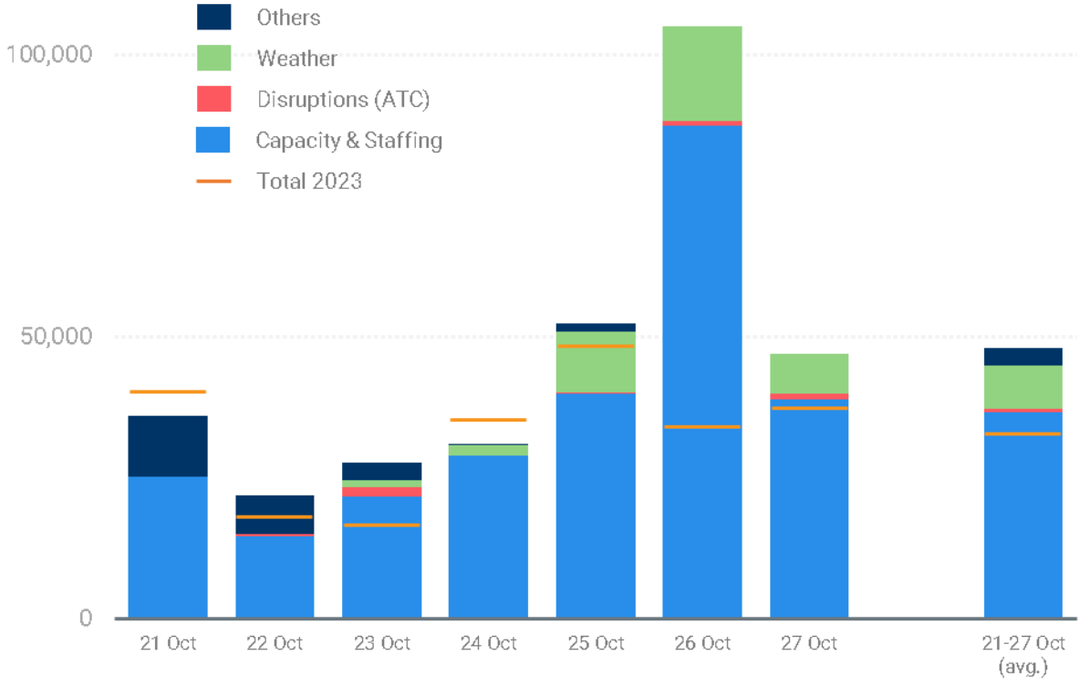
The pictures show the share of flights arriving/departing no later than 15 minutes after/before the scheduled time (OTP15).

- Compared to the equivalent week in 2023, arrival punctuality improved by 3.3 percentage points to 73.8%, and departure punctuality slightly improved by 1.7 percentage points to 68.3%. Compared to the same week in 2019, both indicators recorded a significant drop.
- Airport weather was one of the main causes of delay during the week:
  - Amsterdam Schiphol was affected by low visibility on Wednesday, Thursday and Saturday (with the most severe delays on Wednesday).
  - Thunderstorm activity and strong winds influenced the Balearic Islands and Barcelona, with Saturday seeing high delays.
  - London Gatwick and Heathrow saw regulations due to low visibility.
- Aside from weather, some airports started airfield maintenance works as flights reduced. Both Warsaw and Madrid airports saw regulations due to work in progress.

En-route ATFM delays

Delays per cause (EUROCONTROL Area)

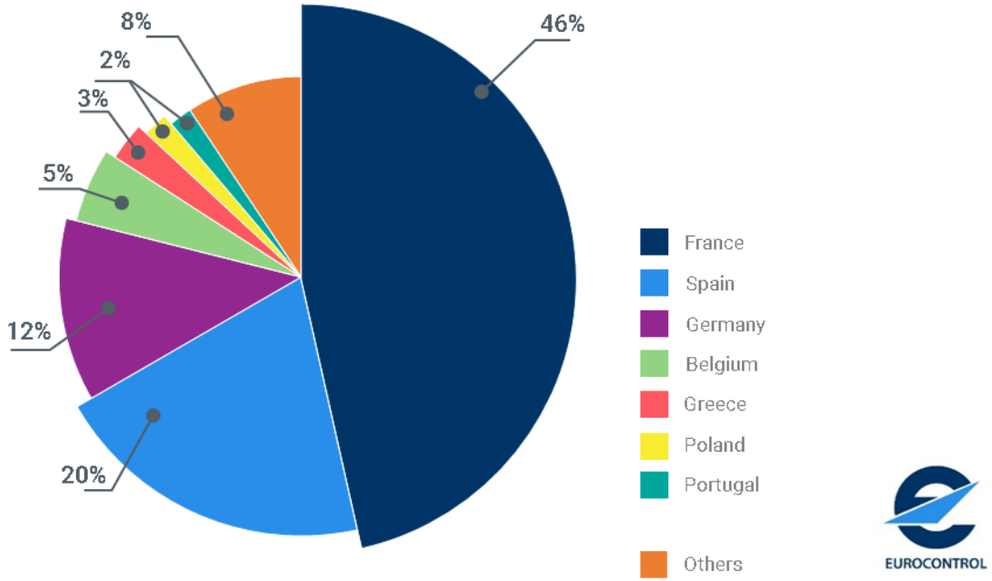
In minutes (total daily and 7-day average) in 2024



- Week 43 (21 - 27 Oct) registered higher delays than Week 42, with an average of 48,052 daily minutes, 46% higher than the same operational week of 2023.
- ATC capacity/staffing were responsible for 76% of all en-route ATFM delay, led by Brest ACC, Marseille ACC, Karlsruhe UAC and Sevilla ACC. Weather was responsible for 16% of the delay, affecting mainly Marseille ACC and Barcelona ACC.
- For the first four weeks of October, en-route ATFM delay was 10% higher than in the same period in 2023.

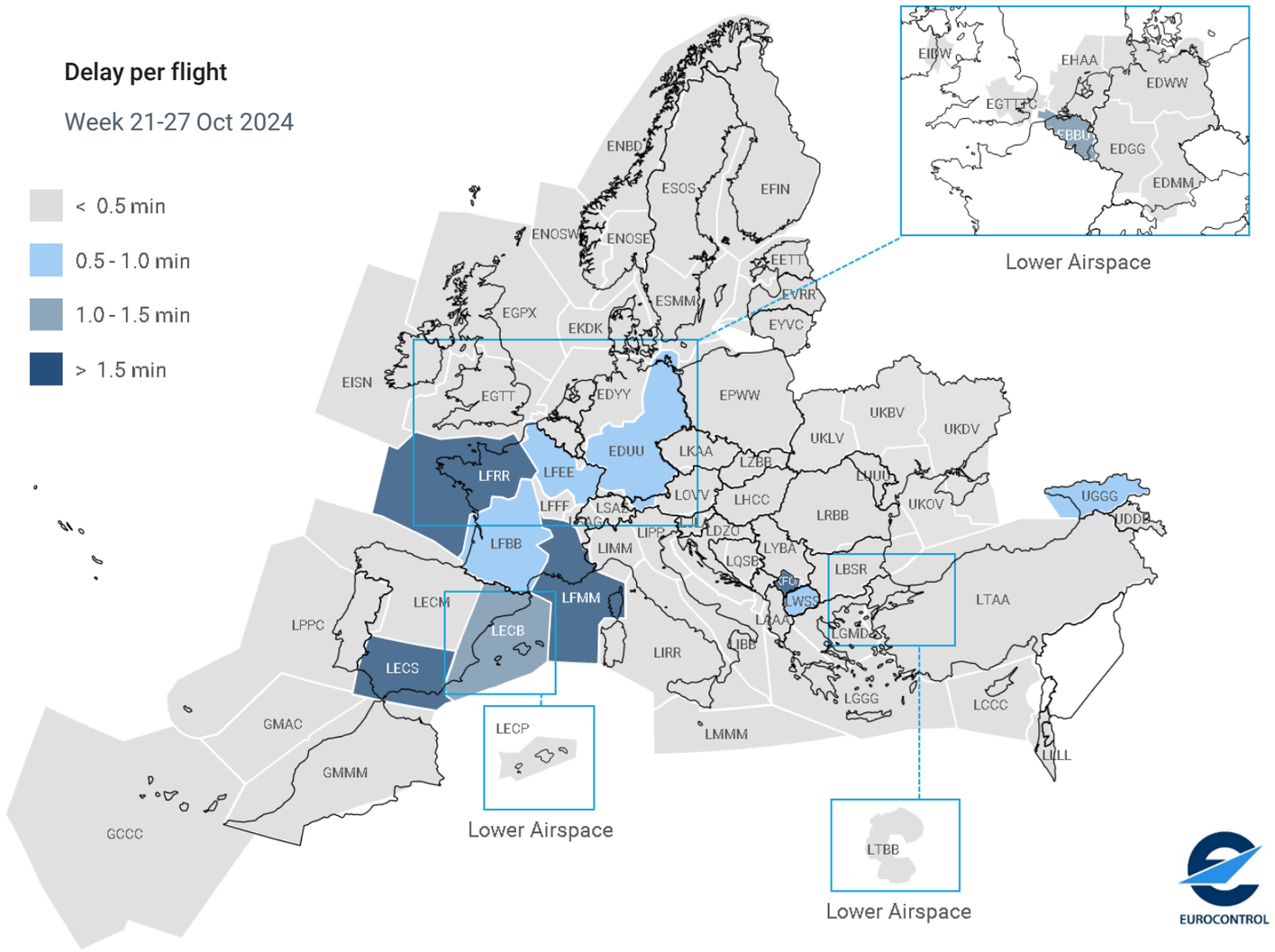
Share of en-route ATFM delays

Week 21-27 Oct 2024



- France accounted for 46% of all en-route ATFM delays, with main reason being capacity/staffing issues in Brest ACC and Marseille ACC. Marseille ACC also recorded significant weather-related delay.
- Spain accounted for 20% of all en-route ATFM delays, mainly due to weather as well as capacity/staffing issues (mainly in Barcelona ACC).
- Germany accounted for 12% of all en-route ATFM delays, mostly due to capacity/staffing affecting Karlsruhe UAC.

En-route ATFM delayed flights per Area Control Centre



- In Week 43 (21 - 27 October), six ACCs recorded en-route ATFM delays higher than 1.0 min/flight.
- Brest ACC recorded 2.6 min/flight. Traffic was +4% above 2019 levels and +3% above 2023. Staffing shortages (2.5 min/flight) over the period Wednesday to Sunday (worse during the week-end) were the main cause of delay.
- Marseille ACC recorded 2.4 min/flight. Traffic was +9% above 2019 levels and 6% above 2023. Recurrent staffing issues (1.5) with thunderstorms on Saturday (0.9) and military training on Wednesday (0.1) also affecting operations.
- Sevilla ACC recorded 2.3 min/flight. Traffic was 29% above 2019 levels and +5% above 2023. High demand generated capacity issues all week.
- KFOR sector recorded 1.6 min/flight. Traffic was +13% above 2019 levels and +14% above 2023. Delay was mainly due to recurrent capacity issues.
- Barcelona ACC recorded 1.4 min/flight. Traffic was +19% above 2019 levels and +9% above 2023. Main ATFM delay cause was due to high demand leading to capacity issues (0.8) compounded by thunderstorms Friday to Sunday (0.6).

Top 10 States

Departures and arrivals

Week 21-27 Oct 2024

See more

No.	Country	Average daily flights	% prev week	% prev year	% 2019
1.	United Kingdom	5,880	+0%	+3%	-3%
2.	Spain	5,443	-1%	+7%	+12%
3.	Germany	5,360	-1%	+4%	-13%
4.	France	4,278	-2%	+3%	-2%
5.	Italy	4,020	-3%	+8%	+13%
6.	Türkiye	3,322	-2%	+4%	+11%
7.	Netherlands	1,679	-1%	+4%	-6%
8.	Greece	1,571	-7%	+17%	+33%
9.	Norway	1,367	-1%	-1%	-9%
10.	Portugal	1,323	-1%	+1%	+12%

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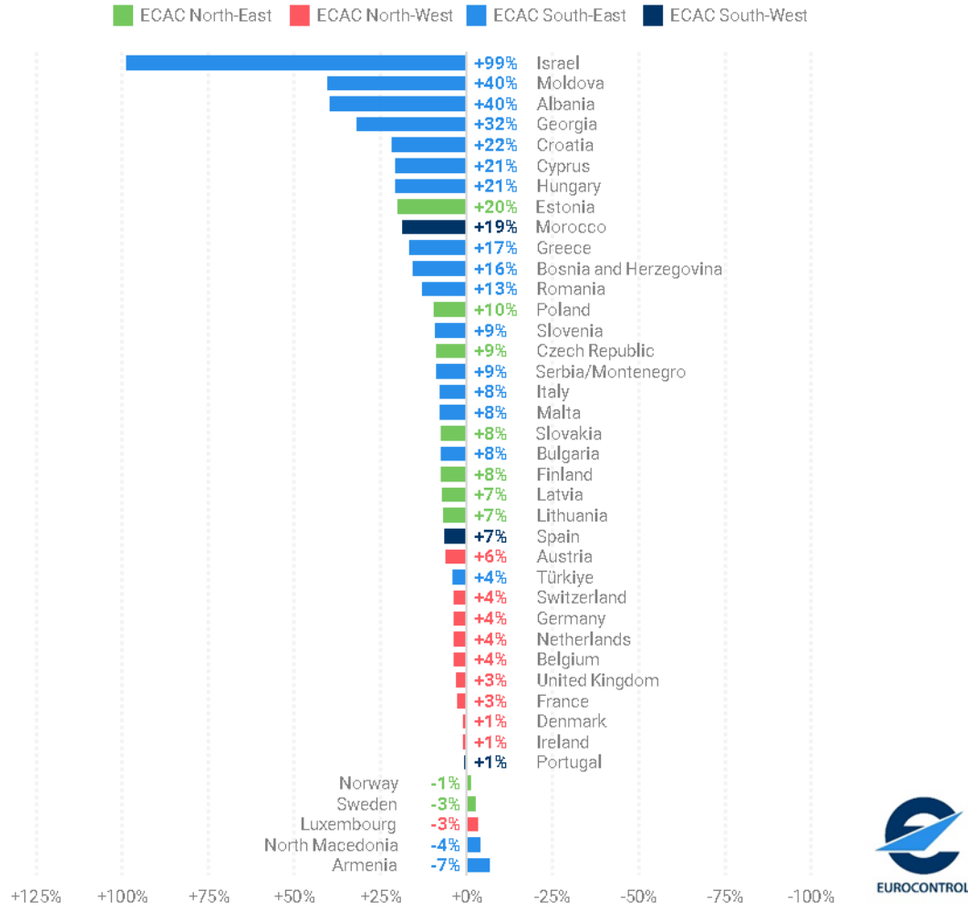
- The top 10 States, in aggregate, recorded 1.5% fewer flights than in the previous week.
- All States but one (UK) recorded fewer flights than in the previous week.
- Greece recorded the greatest decrease (-7%, mainly due to Aegean, Ryanair and Condor) on the domestic flow and on the flows Greece ↔ Denmark, Greece ↔ Germany and Greece ↔ Poland.
- Five States in the top 10 are recording traffic at or above 2019 levels (Greece, Italy, Spain, Türkiye and Portugal), with the remainder between 2% and 13% below pre-COVID levels.
- Traffic from/to Israel doubled vs the same week in October 2023, when the Israel-Hamas war began. This traffic is still 40% below 2019 levels.

States in the EUROCONTROL Network

Compared to the equivalent week in 2023

Dep/Arr flights for week 21-27 Oct 2024



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*Based on integrated ANSP

Top 10 aircraft operators

Week 21-27 Oct 2024 (avg daily flights)

See more

No.	Aircraft operator	Average daily flights	% prev week	% prev year	% 2019
1.	Ryanair Group	3,394	-1%	+8%	+37%
2.	easyJet Group	1,776	-0%	+5%	-1%
3.	Turkish Airlines Group	1,364	-2%	-4%	+2%
4.	Lufthansa Airlines	1,214	-2%	-5%	-22%
5.	Air France Group	1,066	-1%	+5%	-11%
6.	KLM Group	897	-1%	+5%	-3%
7.	Wizz Air Group	875	-2%	+7%	+35%
8.	British Airways Group	851	+1%	+3%	-10%
9.	SAS Group	694	-1%	-2%	-23%
10.	Vueling	640	-1%	+3%	+3%

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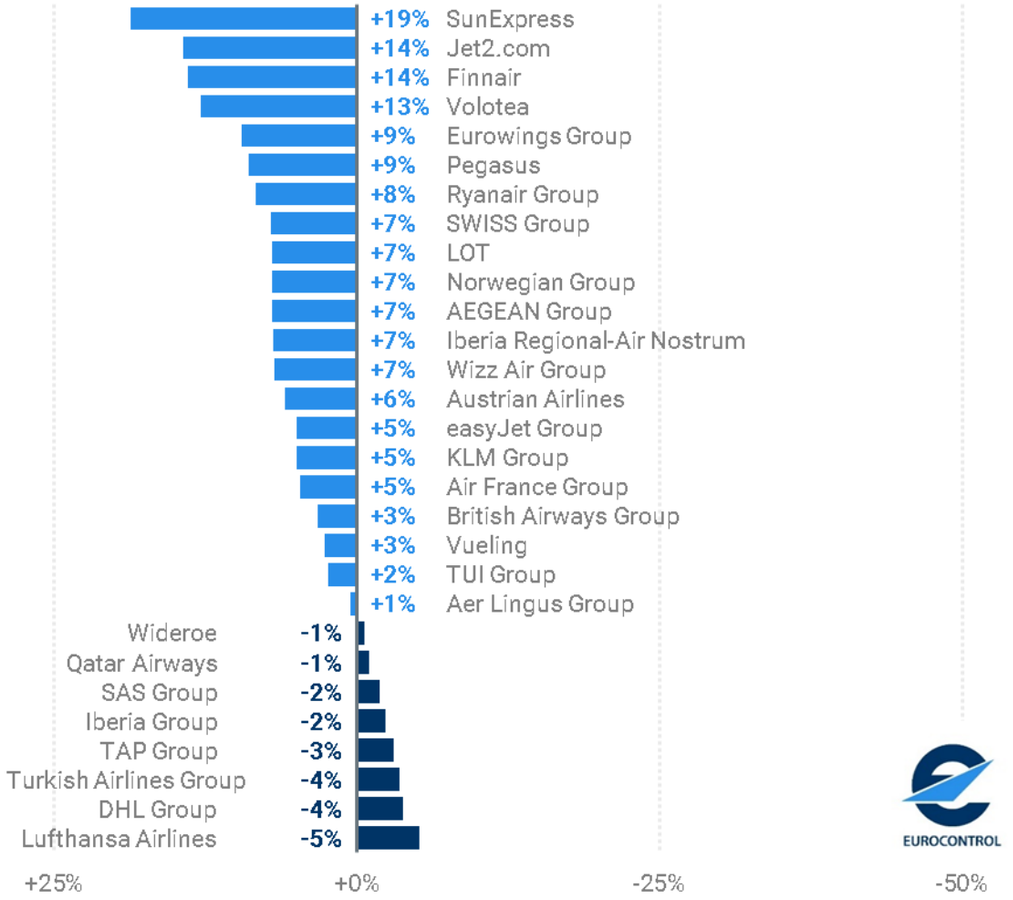
- The top 10 aircraft operators, in aggregate, recorded 1.1% fewer flights than in the previous week, owing to the end of the IATA summer season (with the clock change at the weekend).
- All but one aircraft operators (in the top 10) recorded fewer or an equivalent number of flights than during the previous week. British Airways was the only operator registering growth in this top, mainly due to an increase on domestic flow in UK and on flow UK ↔ US.
- Compared to 2023, all but three airlines are recording higher number of flights.
- Four operators in the top 10 recorded traffic above 2019 levels (Ryanair, Wizz Air, Vueling and Turkish Airlines).
- The highest traffic increase vs 2023 is for SunExpress (+19%) while the main decrease is for Lufthansa (-5%).

Aircraft operators in the EUROCONTROL Network

Compared to the equivalent week in 2023

Dep/Arr flights for week 21-27 Oct 2024



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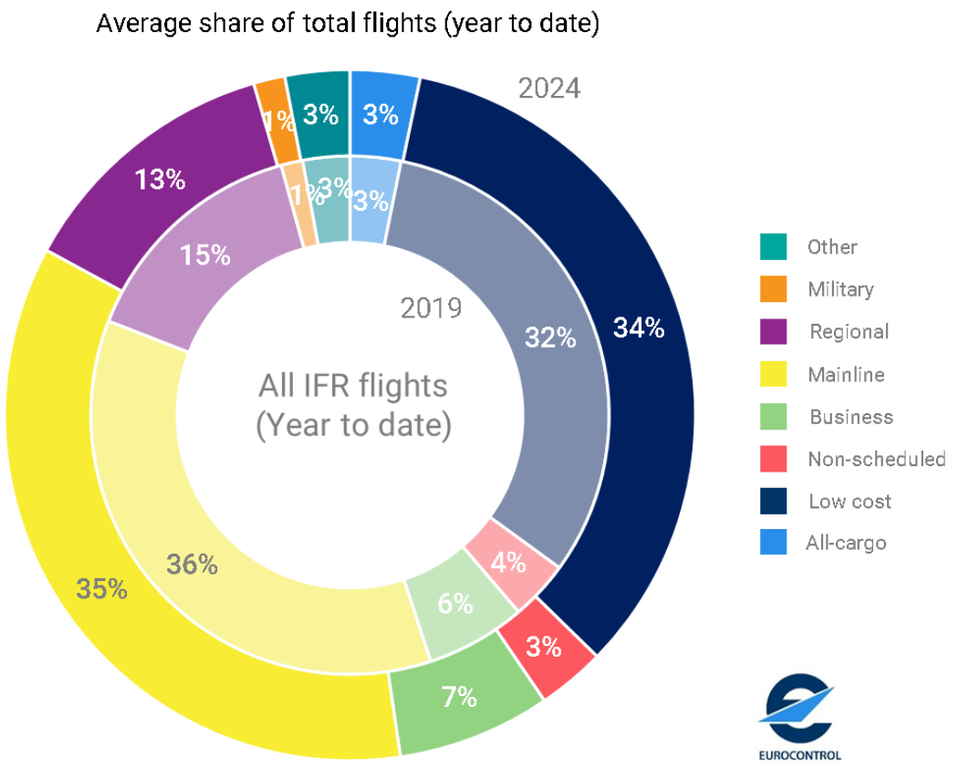
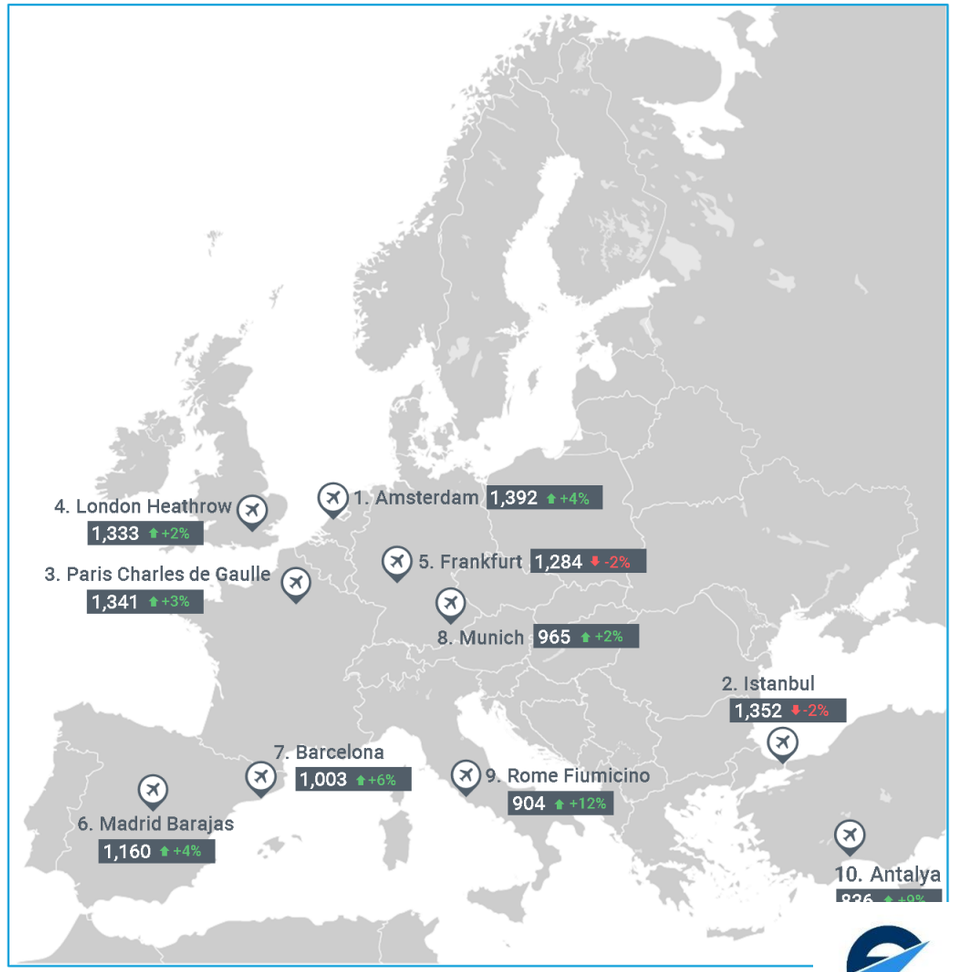
Market segments in the EUROCONTROL Network



No.	Market segment	Avg. flights	% prev week	% prev year	% 2019
1.	Low Cost	11,063	-1%	+8%	+11%
2.	Mainline	10,712	-1%	+5%	-5%
3.	Regional	3,819	-1%	+1%	-11%
4.	Business	1,966	-5%	+3%	+11%
5.	All-cargo	1,014	-2%	-2%	+9%
6.	Other	951	+4%	+8%	-5%
7.	Non-Scheduled	900	-3%	+9%	-11%
8.	Military	487	-3%	-3%	-3%

- Year-to-date, the largest market segment (Mainline) has a 35% share, slightly smaller than the share in the same period of 2019. The second largest segment (Low Cost) is at 34%, up by 2pp compared to 2019. The Regional market share, however, has shrunk by 2pp to 13%, while the 3% market share for All-cargo is comparable to the same period in 2019.
- Over the previous week, the numbers of passenger flights have declined: Mainline (-1%), Regional (-1%), Low Cost (-1%) and Non-Scheduled (-3%) and Business Aviation (-5%).
- Three market segments are recording flights above 2019 levels: All-cargo (+9%), Business (+11%) and Low Cost (+11%). Mainline were 5% below the 2019 levels while Regional and Non-Scheduled recorded 2-digit decreases (-11% each).

Top 10 airports



Airport ranking

Week 21-27 Oct 2024

See more

No.	Airport	Avg. daily dep/arr flights	% prev week	% prev year	% 2019
1.	Amsterdam	1,392	-2%	+4%	-6%
2.	Istanbul	1,352	-2%	-2%	+12%
3.	Paris Charles de Gaulle	1,341	-2%	+3%	-6%
4.	London Heathrow	1,333	+2%	+2%	-0%
5.	Frankfurt	1,284	-2%	-2%	-13%
6.	Madrid Barajas	1,160	+2%	+4%	-3%
7.	Barcelona	1,003	-3%	+6%	+1%
8.	Munich	965	-1%	+2%	-19%
9.	Rome Fiumicino	904	-2%	+12%	+9%
10.	Antalya	836	-2%	+9%	+19%

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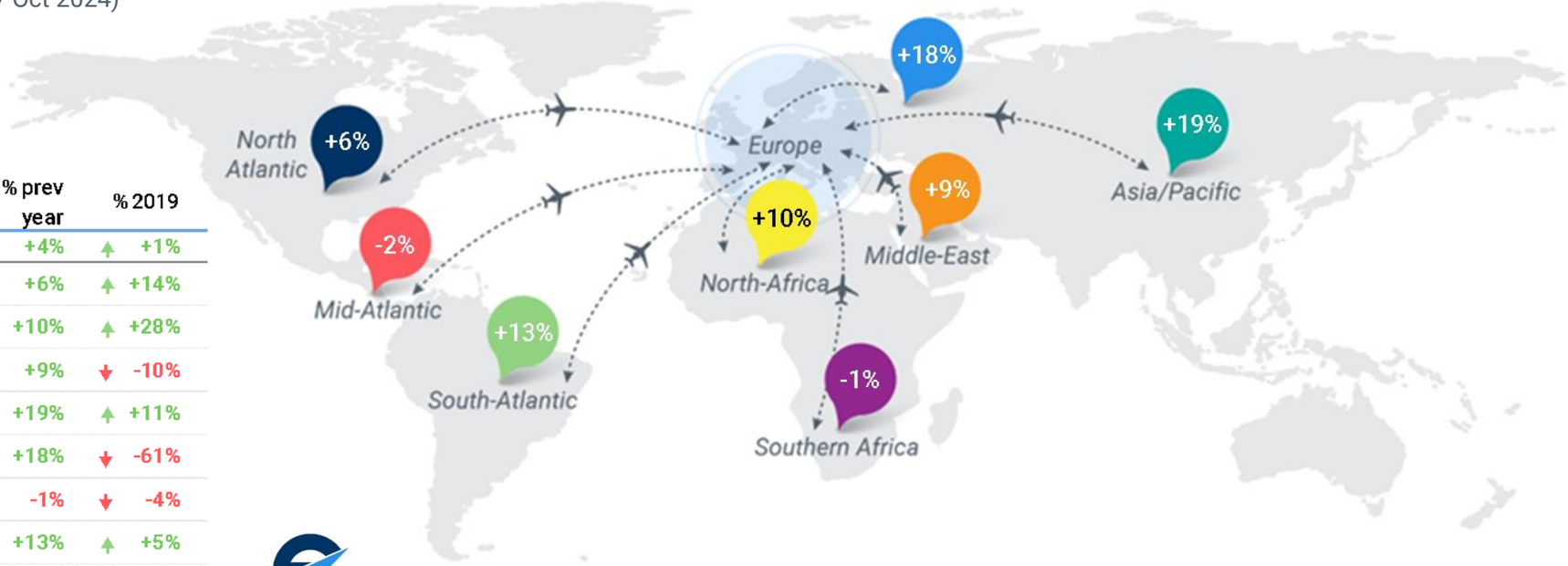
- Compared to the previous edition, there was no change except Antalya which entered the top 10 and Palma de Mallorca which exited.
- Amsterdam (1,392 flights per day, -2% vs previous week) is the busiest airport, followed by Istanbul (1,352, -2%) and Paris CDG (1,341, -2%).
- All but two airports (from the top 10) recorded higher flights than in 2023.
- Four of the top 10 airports (Antalya, Istanbul, Rome and Barcelona) are currently handling traffic above their 2019 levels (respectively +19%, +12%, +9% and +1%).

Traffic flows

(average daily departure/arrival flights for week 21-27 Oct 2024)

Region	Average daily flights	% prev week	% prev year	% 2019
Intra-Europe	24,103	-2%	+4%	+1%
Europe ↔ North Atlantic	1,409	-3%	+6%	+14%
Europe ↔ North-Africa	1,353	+1%	+10%	+28%
Europe ↔ Middle-East	1,276	+2%	+9%	-10%
Europe ↔ Asia/Pacific	901	-0%	+19%	+11%
Europe ↔ Other Europe	421	-3%	+18%	-61%
Europe ↔ Southern Africa	302	+0%	-1%	-4%
Europe ↔ South-Atlantic	195	-2%	+13%	+5%
Europe ↔ Mid-Atlantic	164	+5%	-2%	+7%
Non Intra-Europe	6,021	-0.2%	+10%	-4%



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- The main traffic flow - intra-European - recorded 24,103 daily flights last week, 2% fewer than the previous week. Intercontinental flows amounted to 6,021 daily flights on average, below (-0.2%) the previous week.
- The second-largest flow is with North Atlantic, with 1,409 flights per day (-3% compared to the previous week owing to decreases on flows UK ↔ US and Germany ↔ US).
- The third-largest flow is with North-Africa with 1,353 average daily flights (1% increase compared to the previous week).The fourth is with the Middle-East, with 1,276 daily flights (2% increase compared to the previous week, owing to decreases on Iran ↔ Türkiye, Lebanon ↔ Türkiye and Qatar ↔ Türkiye).
- Flows between Europe and the Asia/Pacific region (901 flights per day, slightly below previous week) is recording traffic 19% above the same week in 2023 and 11% above 2019 levels.
- Flows with 'Other Europe' (including the Russian Federation) remain massively reduced at -61% compared to 2019.

Top 10 long-haul country pairs

(average daily departure/arrival flights for the last week)

Week 21-27 Oct 2024

No.	Country pair	Average daily flights	% prev week	% prev year	% 2019
1.	UK ↔ US	320	-1%	-1%	+7%
2.	Germany ↔ US	166	-2%	-9%	-1%
3.	France ↔ US	123	-9%	-0%	+2%
4.	Italy ↔ US	91	-5%	+16%	+29%
5.	Netherlands ↔ US	78	-2%	-0%	-3%
6.	Spain ↔ US	74	+3%	+10%	+6%
7.	Ireland ↔ US	68	-4%	+1%	+4%
8.	UAE ↔ UK	62	-1%	+6%	-4%
9.	Russia ↔ UAE	47	+18%	+16%	+840%
10.	Türkiye ↔ US	46	-2%	+11%	+102%

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- Eight of the top 10 long-haul country pairs are with the United States, the main three being between the US and the UK, Germany & France. The non-US related long-haul flows within the top 10 are UAE ↔ UK and Russia ↔ UAE.
- Only two long-haul flows posted increases in number on the previous week:, Spain ↔ US (+3%) and Russia ↔ UAE (+18%). France ↔ US posted a 9% decrease.
- All but four of the top long-haul flows recorded positive or similar growth vs 2023, notably Italy ↔ US (+16%), Russia ↔ UAE (+16%) and Türkiye ↔ US (+11%).
- Seven flows are currently above 2019 levels, notably Russia ↔ UAE (+840%), Türkiye ↔ US (+102%) and Italy ↔US (+29%).

Economics

Week 21-27 Oct 2024

25 Oct 2024
avg fuel price:

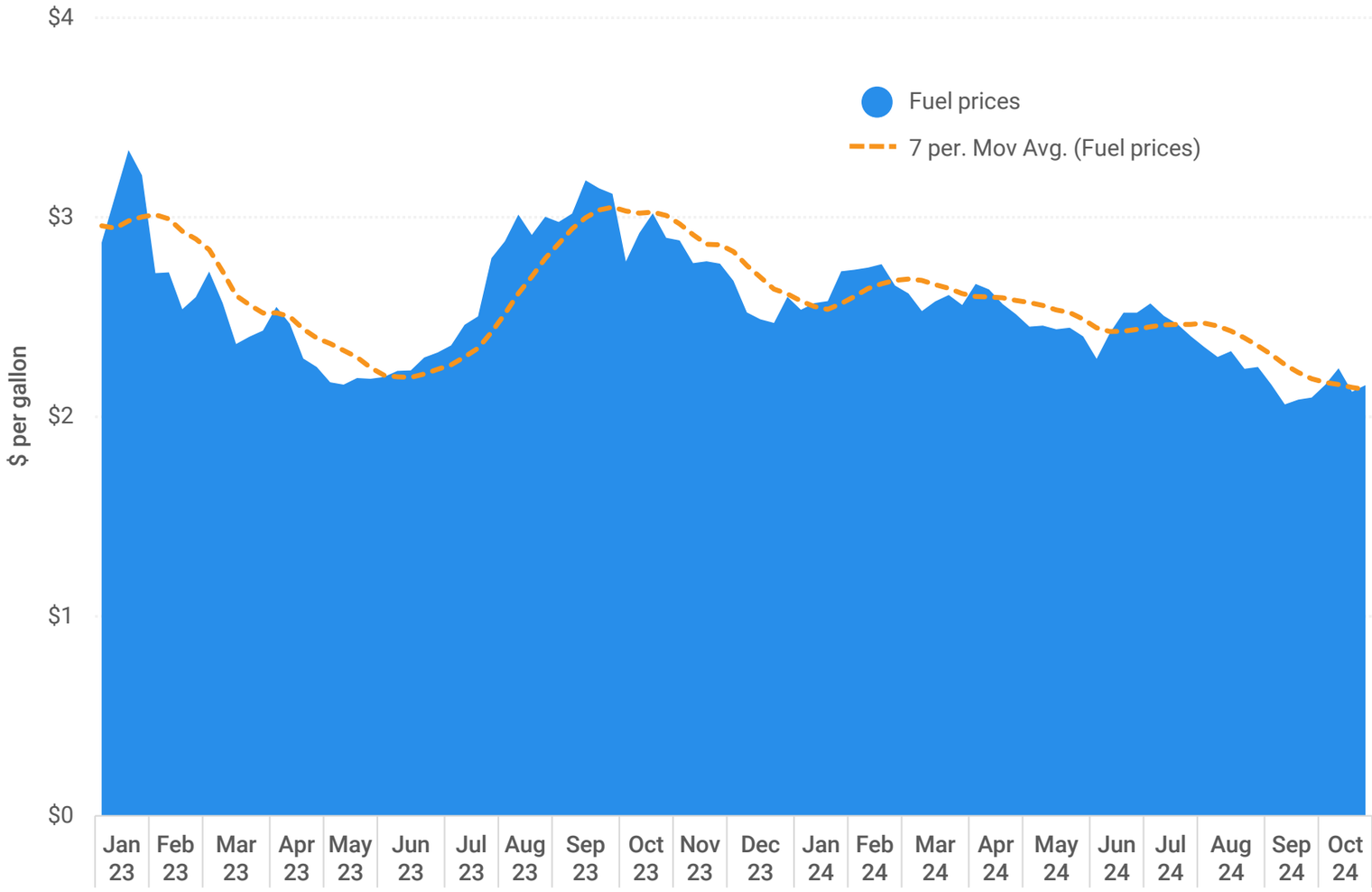
$2.16 /gallon

-4%
vs. $2.24 /gallon
on 11 Oct 2024

Source: IATA/Platts

- The average price of jet fuel closed at 2.16 USD/gallon on 25 October 2024, a 4% decrease compared to the level of two weeks ago.
- Since September 2023, the 7-day average fuel price has generally been decreasing, except for increases in January and June 2024, following the new package of sanctions against Russia EU countries agreed over Russia's war in Ukraine. In addition, OPEC+ agreed to extend the oil cuts of 2.2 million barrels/day until the end of November 2024, after which these cuts will be gradually phased out on a monthly basis starting in December 2024.

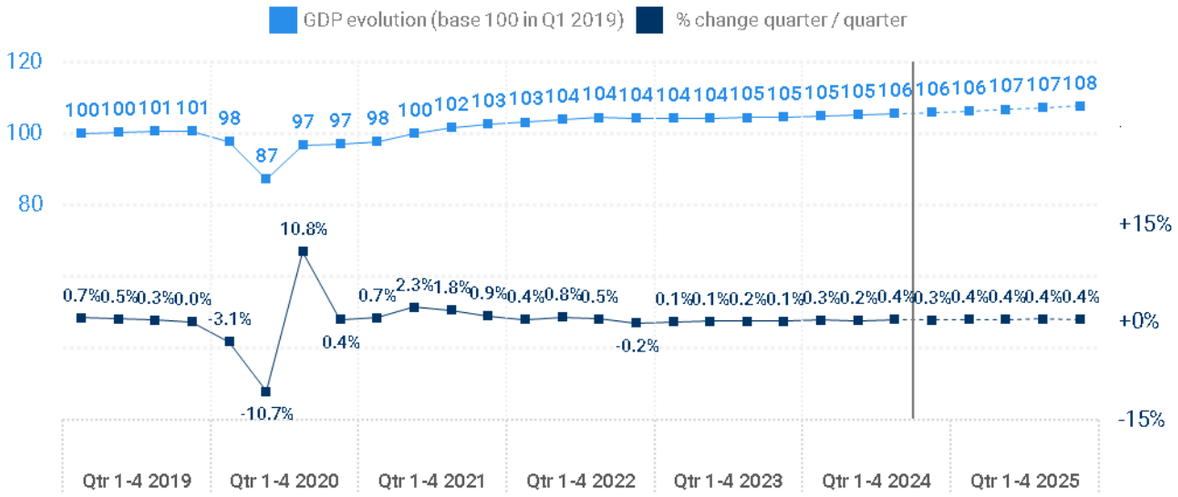
Jet fuel price (Europe)



Source: IATA/Platts

GDP in the European Union

Constant prices and exchange rate, Euro

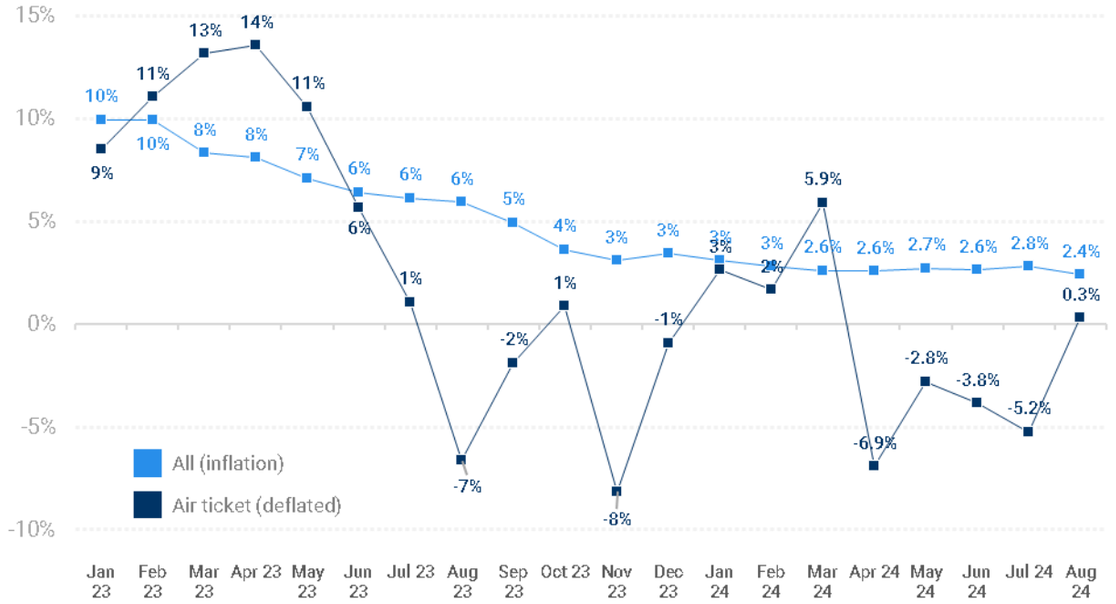


Source: Oxford Economics Ltd.

- According to the latest GDP forecast from Oxford Economics, the EU27 economies posted a positive growth during Q3 2024 (+0.4% vs Q3 2023). The EU27 quarterly forecast rates for Q4 2024 is for 0.3% (vs Q4 2023).
- At an annual level, Oxford Economics Ltd. expects the EU27 GDP to expand by 0.9% in 2024 and by a relatively robust 1.45% in 2025.

Price change per month (EU27)

Values compare to the same month of the previous year



Source: EUROSTAT

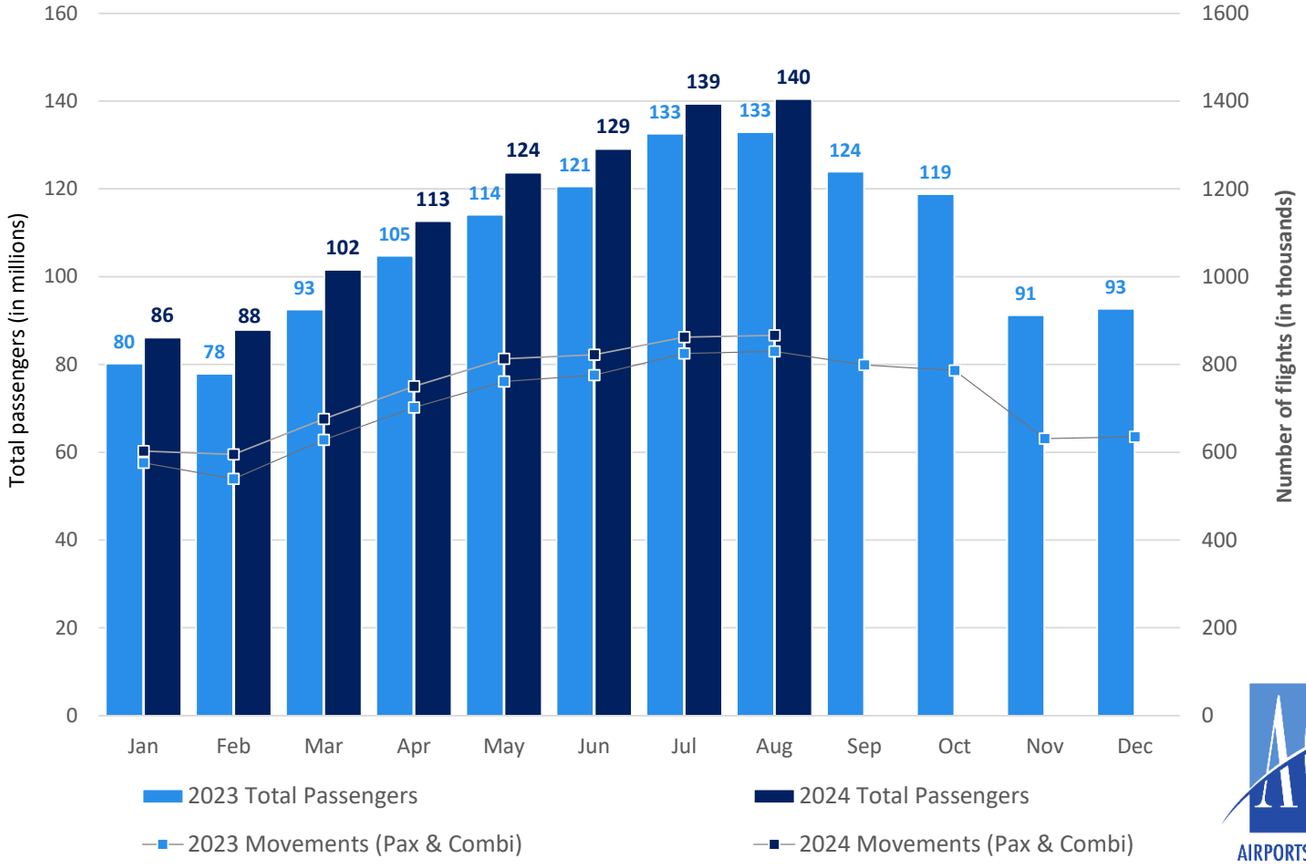
The latest information from EUROSTAT shows the following:

- In August 2024, all-prices inflation was at 2.4% (vs August 2023), slightly below the previous months' rates. Ticket prices (excluding inflation) remained stable (slight increase of 0.3%) compared to August 2023.
- After almost two years of monthly fluctuations, the ticket prices changes in August 2024 seem to have stabilized.
- Compared to July 2024, air ticket prices were 1% higher in August 2024.

Top 40 European airports: Passengers

2024

Passengers and flights at ECAC top 40 Airports



Based on Airports Council International (ACI) **passenger** data, and for the **top 40 European airports**:

- The number of passengers(*) reached 409 **million** over the June-to-August 2024 period, **6%** more than in the same period in **2023**, with a total of 2.55 million flights in the same period in 2024, a 5% increase on previous year.
- The respective **recovery** rates **on 2019** levels for June-August 2024 were **101%** in **passenger numbers**, and **95%** in terms of **flights**.

(*): Passengers comprise International enplaned + deplaned, Domestic enplaned +deplaned, as well as Transit passengers (counted once).

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To further assist you in your analysis, EUROCONTROL provides the following additional information on a daily basis (daily updates at 8:45 CET for the first item) and every Friday for the last item:

1. EUROCONTROL Aviation Intelligence Portal:
   www.eurocontrol.int/Economics/
   This dashboard provides daily performance data on Day+1 for all European States; for the largest airports; for each Area Control Centre (ACC) and the largest airline operators.

2. EUROCONTROL "Our Data" Portal:
   www.eurocontrol.int/our-data/
   This webpage provides an overview of key charts and publications related to European aviation performance.

3. EUROCONTROL Data App: Available at Android Play Store (link), Apple App Store (link).
   This app provides daily performance data on Day+1 at network level and top stakeholders.

4. Rolling Seasonal Plan:
   www.eurocontrol.int/publication/european-network-operations-plan-2023-rolling-seasonal-plan
   This Rolling Seasonal Plan covers a rolling six or eight-week period and consolidates data from 350 airlines, 68 area control centres (ACCs), 55 airports and 43 States. It plays a major role in helping European aviation to recover by providing aviation's key actors with the global view they need to plan effectively.

For more information please contact aviation.intelligence@eurocontrol.int