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EUROPEAN AVIATION OVERVIEW

23-29 Sep 2024

Wednesday 02 October 2024

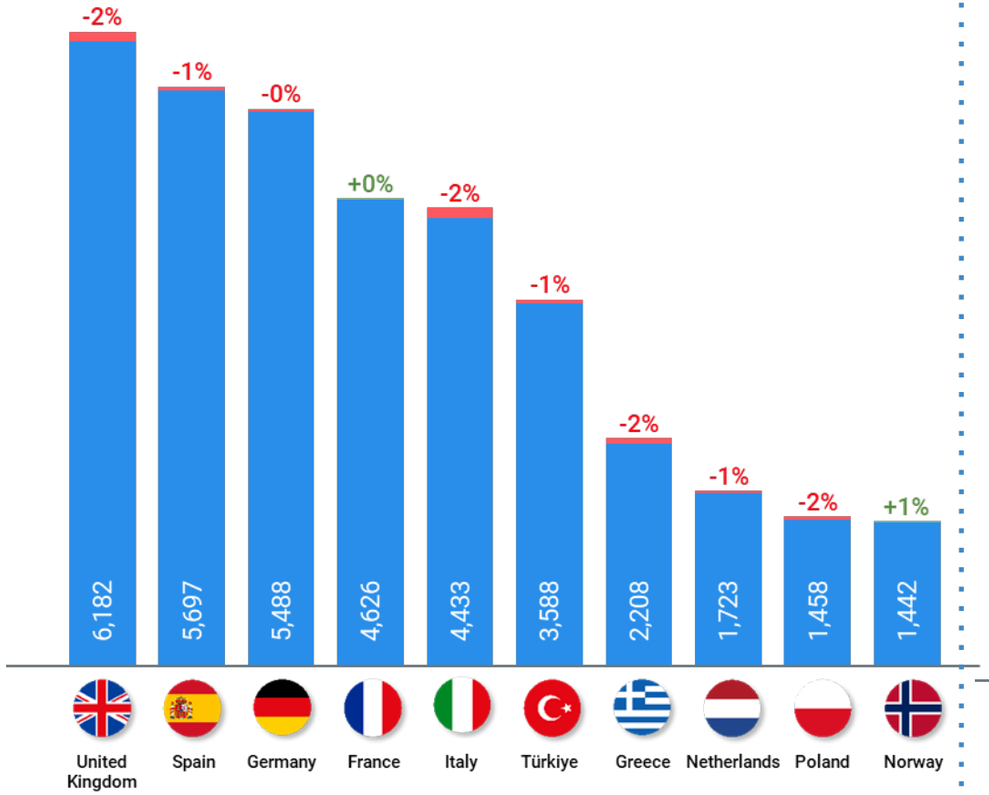
Headlines
(Week 23-29 Sep 2024)

- The network recorded 33,128 average daily flights (+4% vs 2023). This was below (-1.3%) the previous week's average.
- With the end of the Summer, the capacities of all the top 10 carriers have either stayed at a similar level over the last week, or else reduced.
- Network traffic in September was at 97% of 2019 levels, in line with the latest base STATFOR forecast (97%); locally, the situation is more diverse, notably in the South-East axis with traffic growth well beyond that level. Year-to-date traffic is 96% of 2019, 5% more than 2023.
- En-route ATFM delays were higher than in the previous week (+9%), with an average of approximately 72,100 daily minutes. This is 54% higher than in 2023 and represents, on average, 2.18 min/flight.
- ATC capacity/staffing was the top delay cause last week (66% of all en-route ATFM delays), followed by convective weather (21%).
- The average jet fuel price was at 2.10 USD/gallon on 27 September 2024, a slight (2%) increase over two weeks. On average, jet fuel prices have decreased by 32% between September 2023 and September 2024.

Top 10 busiest States

On week 23-29 Sep 2024

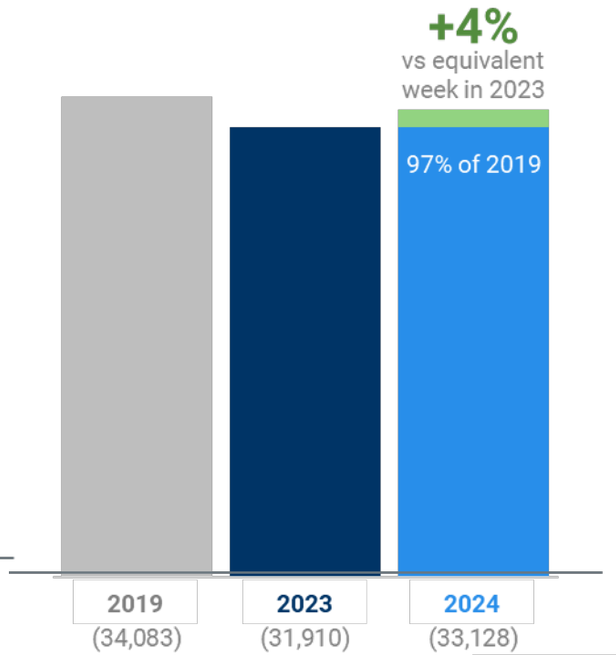
(all flights excl. overflights compared with previous week)



Traffic situation

Average daily flights (including overflights)

Week 23-29 Sep 2024

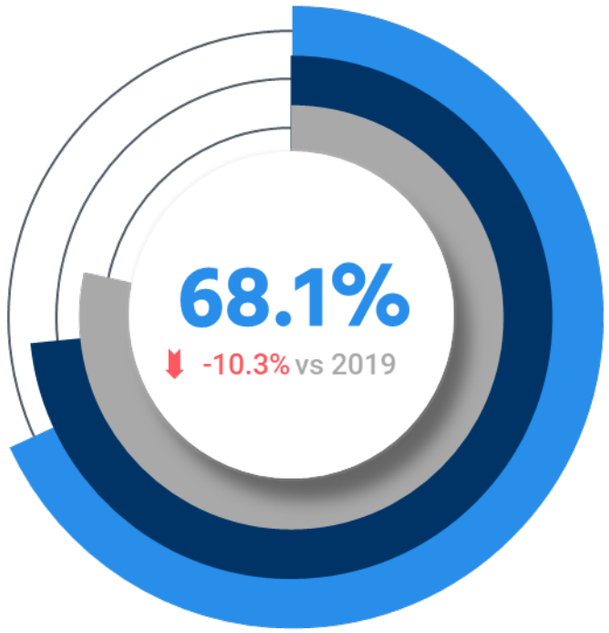


Arrival & departure punctuality

(all network scheduled flights)

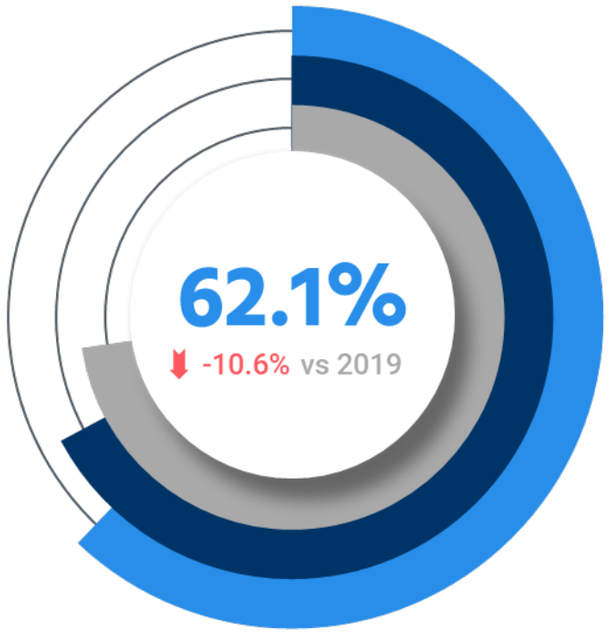
Week 23-29 Sep 2024

ARRIVAL PUNCTUALITY



78.4% _____ in 2019
73.4% _____ in 2023

DEPARTURE PUNCTUALITY



72.7% _____ in 2019
67.2% _____ in 2023

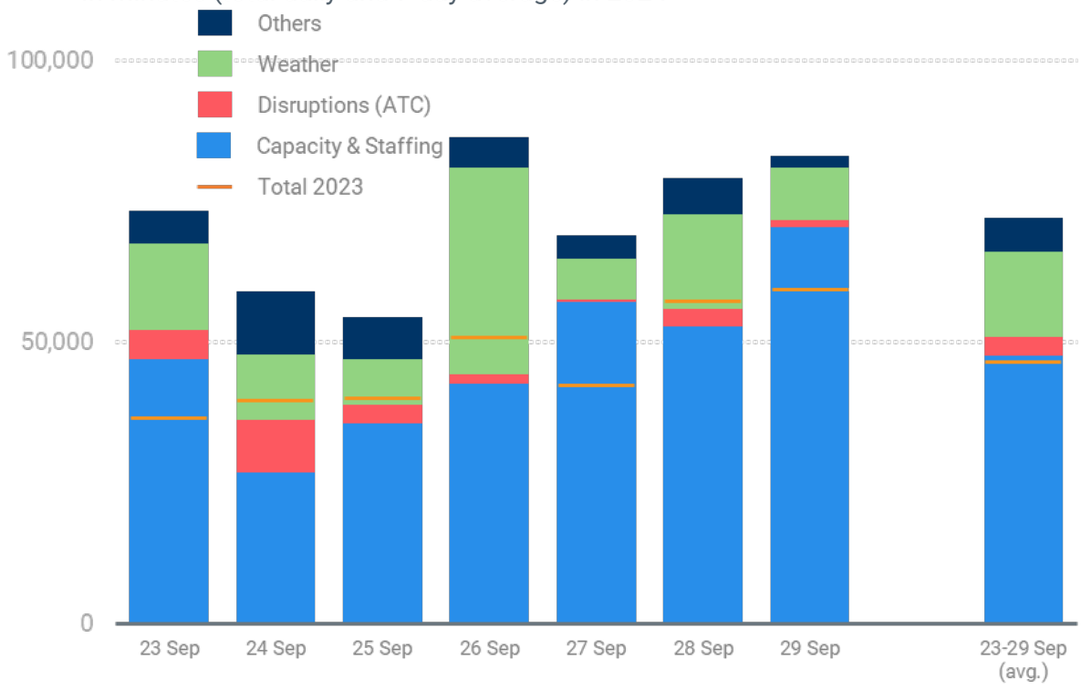
The pictures show the share of flights arriving/departing no later than 15 minutes after/before the scheduled time (OTP15).

- Network punctuality deteriorated when compared to the equivalent week in 2023. Arrival punctuality decreased by 5.3 percentage points to 68.1%, and departure punctuality decreased by 5.1 percentage points to 62.1%. Compared to the same week in 2019, both arrival and departure punctuality deteriorated (respectively -10.3pp and -10.6pp).
- Gatwick suffered from a mixture of ATC capacity, aerodrome capacity (due to taxiway work) and weather (cumulonimbus (CB)), with Thursday seeing high delays. However, compared to last week, delay was stable.
- Lisbon saw delays mainly due to weather (low cloud ceiling and Low Visibility Procedures (LVP)) on Wednesday. The airport also suffered from some smaller magnitude ATC and aerodrome capacity regulations.
- Amsterdam saw daily regulations for aerodrome capacity due to high demand; however, weather was the main issue with Tuesday and Wednesday seeing very high delays due to CBs and high winds.
- Warsaw saw the start of its apron renovation and reconfiguration (RWY 11/29 closed due to work 18Sep-11Nov).
- Heathrow continued to suffer daily weather regulations due to wind. Sunday saw high delays following a combination of CB/LVP and a brief period of single RWY operations.

En-route ATFM delays

Delays per cause (EUROCONTROL Area)

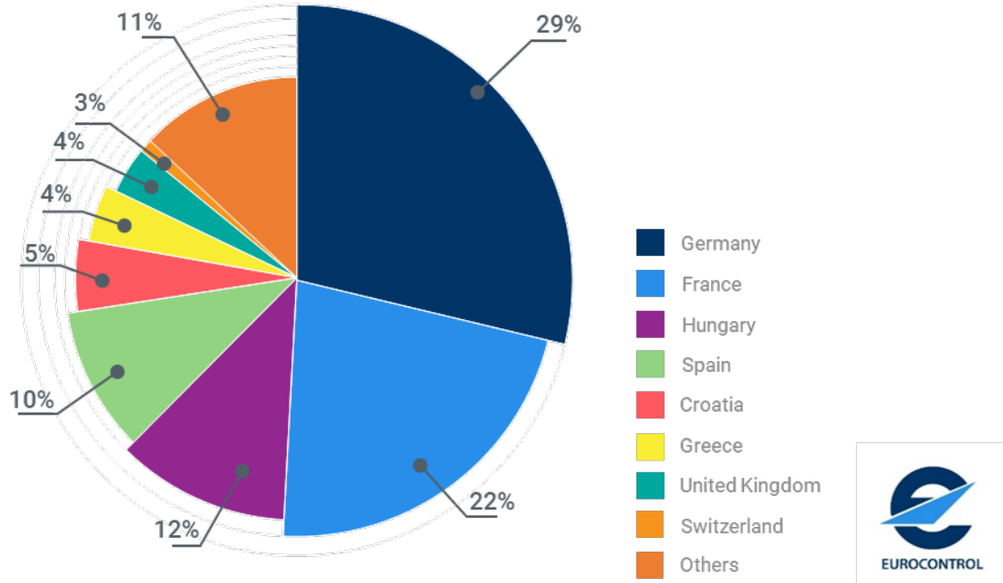
In minutes (total daily and 7-day average) in 2024



- Week 39 (23 - 29 Sep) registered higher delays than Week 38, with an average of 72,091 daily minutes, 54% above the same operational week of 2023.
- ATC capacity/staffing were responsible for 66% of all en-route ATFM delay, led by Karlsruhe UAC, Budapest ACC and Marseille ACC. Weather was responsible for 21% of the delay, affecting Karlsruhe UAC, Zagreb ACC and Reims ACC.
- For the month of September, en-route ATFM delay was 40% higher than in the same period in 2023. For the third quarter of 2024, en-route ATFM delay was 60% higher than in the same quarter in 2023.

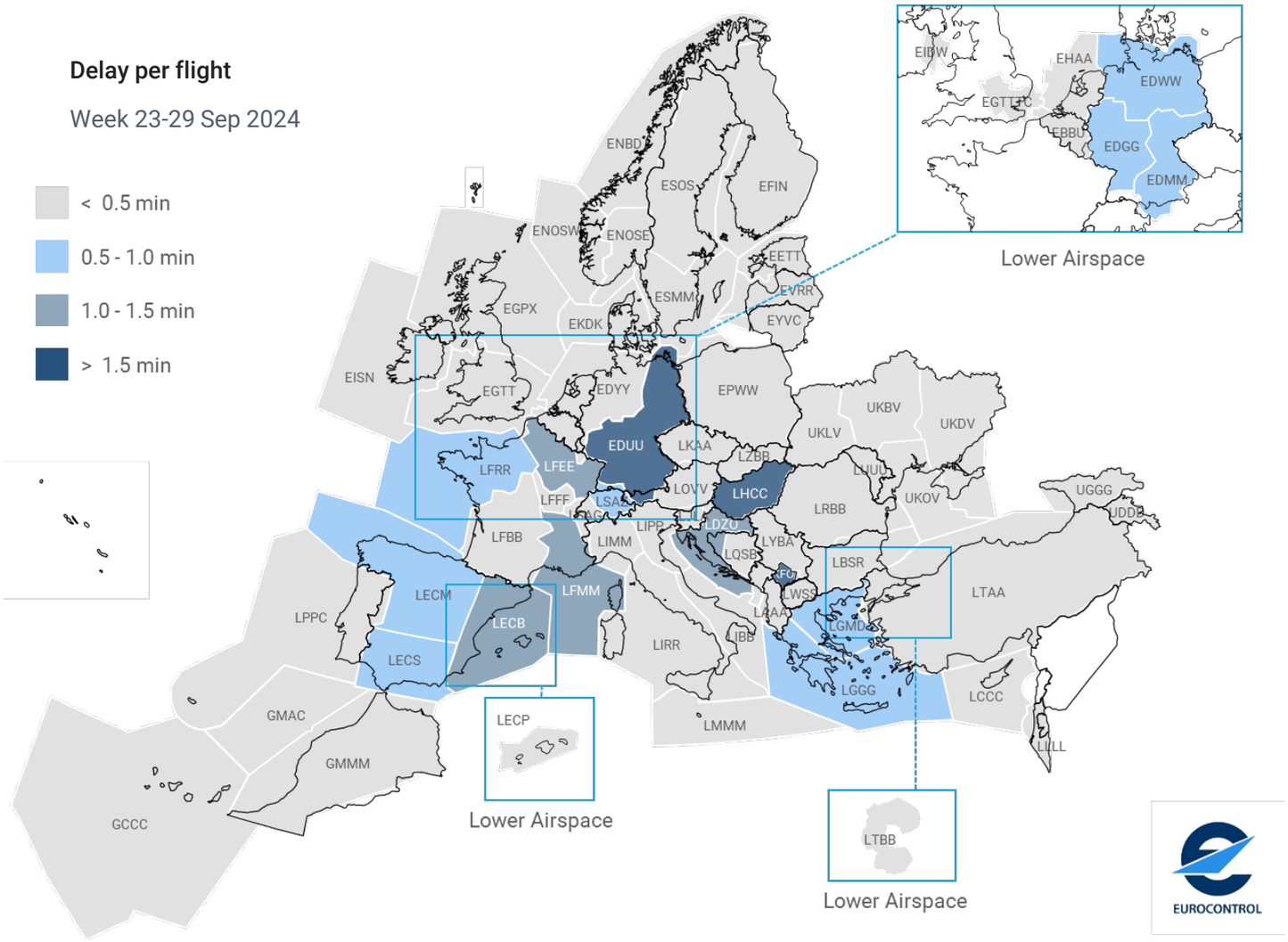
Share of en-route ATFM delays

Week 23-29 Sep 2024



- Germany accounted for 29% of en-route delays, of which 19.8pp were attributed to Karlsruhe, 3.7pp to Munich, 2.7pp to Langen, and 2.2pp to Bremen ACC.
- France accounted for 22%, mainly originating from capacity and staffing issues compounded by an antenna failure in Marseille ACC and ATC equipment issues in Brest.
- Hungary accounted for 12%; due to capacity and staffing as well as 'other' in Budapest ACC (linked to high traffic demand due to onload from L'viv FIR and the busy flow Moscow – Türkiye).

En-route ATFM delayed flights per Area Control Centre



- In Week 39 (23 - 29 September), seven ACCs recorded en-route ATFM delays higher than 1.0 min/flight.
- Karlsruhe UAC recorded 2.4 min/flight. Traffic was +5% above 2019 levels and +6% above 2023. Capacity/staffing caused most of the delay (1.9 min/flight). Operations were affected by thundery outbreaks on Monday and turbulence caused by the North-Atlantic jetstream on Wednesday, Thursday and Sunday (0.5 min/flight).
- Budapest ACC recorded 2.3 min/flight. Traffic was +27% above 2019 levels, +5% above 2023. Delays were mostly due to high traffic demand and on-load from flights avoiding L'viv FIR all week (2.3 min/flight).
- KFOR Sector recorded 1.7 min/flight. Traffic was +4% above 2019 levels but 1% below 2023. Delays were mostly due to capacity/staffing issues.
- Marseille ACC recorded 1.4 min/flight. Traffic was +1% above 2019 levels and +4% above 2023. Operations were mostly disrupted by staffing issues (1.0 min/flight); an antenna failure caused communication issues leading to reduced sector availability (0.3 min/flight) on Tuesday.
- Reims ACC recorded 1.3 min/flight. Traffic was +10% above 2019 levels and +5% above 2023. Capacity/staffing issues affected operations (0.9 min/flight) in addition to weather issues (0.4 min/flight).

Top 10 States

Departures and arrivals

Week 23-29 Sep 2024

See more

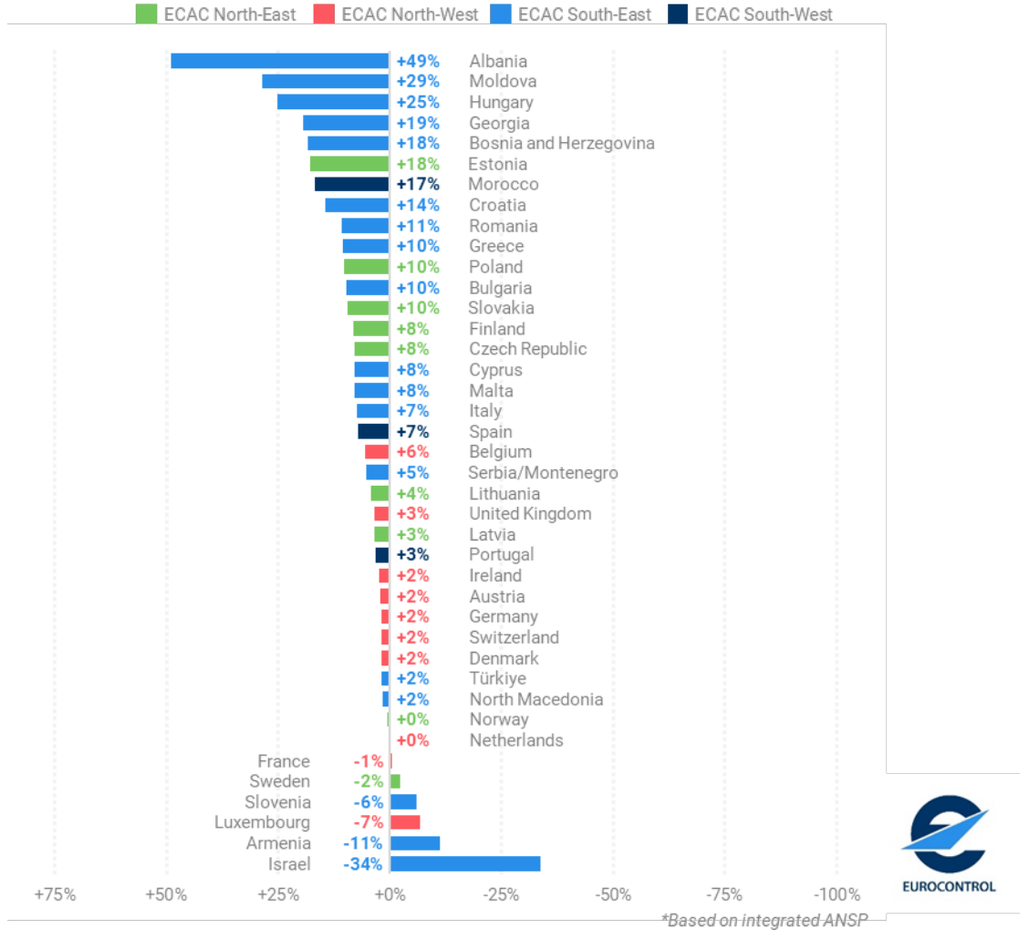
No.	Country	Average daily flights	% prev week	% prev year	% 2019
1.	United Kingdom	6,182	-2%	+3%	-4%
2.	Spain	5,697	-1%	+7%	+7%
3.	Germany	5,488	-0%	+2%	-14%
4.	France	4,626	+0%	-1%	-4%
5.	Italy	4,433	-2%	+7%	+8%
6.	Türkiye	3,588	-1%	+2%	+10%
7.	Greece	2,208	-2%	+10%	+19%
8.	Netherlands	1,723	-1%	+0%	-6%
9.	Poland	1,458	-2%	+10%	+15%
10.	Norway	1,442	+1%	+0%	-7%

- The top 10 States, in aggregate, recorded 1% fewer flights than in the previous week .
- Most of the States in the top 10 recorded fewer flights vs the previous week, except Norway (+1%) and France (0%).
- Five States in the top 10 are recording traffic at or above 2019 levels (Spain, Italy, Türkiye, Greece and Poland), with the remainder between 4% and 14% below pre-COVID levels.
- The highest increases of traffic vs 2023 were for the States in the South-East axis, especially Albania, Hungary, Georgia or Bosnia-Herzegovina all had growth of 18% or more.
- At network level, the lowest number of flights compared to the same week in 2023 was to/from Israel (-34%).

States in the EUROCONTROL Network

Compared to the equivalent week in 2023

Dep/Arr flights for week 23-29 Sep 2024



*Based on integrated ANSP

Top 10 aircraft operators

Week 23-29 Sep 2024 (avg daily flights)

See more

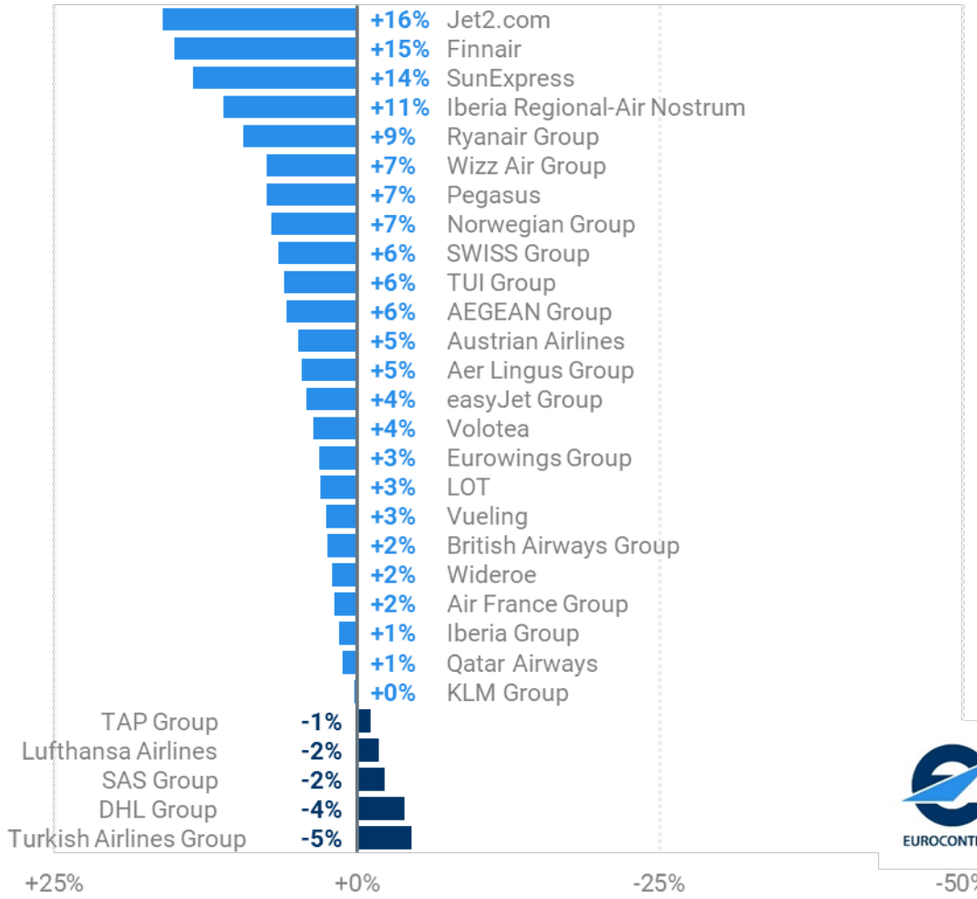
No.	Aircraft operator	Average daily flights	% prev week	% prev year	% 2019
1.	Ryanair Group	3,566	-0%	+9%	+37%
2.	easyJet Group	1,824	-1%	+4%	-4%
3.	Turkish Airlines Group	1,463	-1%	-5%	+5%
4.	Lufthansa Airlines	1,249	-0%	-2%	-22%
5.	Air France Group	1,083	-2%	+2%	-15%
6.	Wizz Air Group	926	-1%	+7%	+39%
7.	KLM Group	911	-1%	+0%	-5%
8.	British Airways Group	852	-3%	+2%	-5%
9.	SAS Group	714	-2%	-2%	-25%
10.	Vueling	653	-1%	+3%	-5%

- The top 10 aircraft operators, in aggregate, recorded 1.1% fewer flights than in the previous week, owing to the end of the Summer season, adapting to the reduction in demand.
- All aircraft operators (in the top 10) recorded fewer or an equivalent number of flights than during the previous week. The largest reduction was for British Airways (-3%) – due to decreases on flows between UK and Spain, Italy and France.
- Compared to 2023, Turkish Airlines recorded a 5% decrease, owing to reduction on domestic flows in Türkiye, but also on flows Türkiye ↔ Israel and on Türkiye ↔ Lebanon.
- Three operators in the top 10 recorded traffic above 2019 levels (Ryanair, Wizz Air and Turkish Airlines).
- The highest traffic increases vs 2023 are for Jet2.com (+16%), Finnair (+15%), SunExpress (+14%), Iberia Regional-Air Nostrum (+11%) and Ryanair (+9%).

Aircraft operators in the EUROCONTROL Network

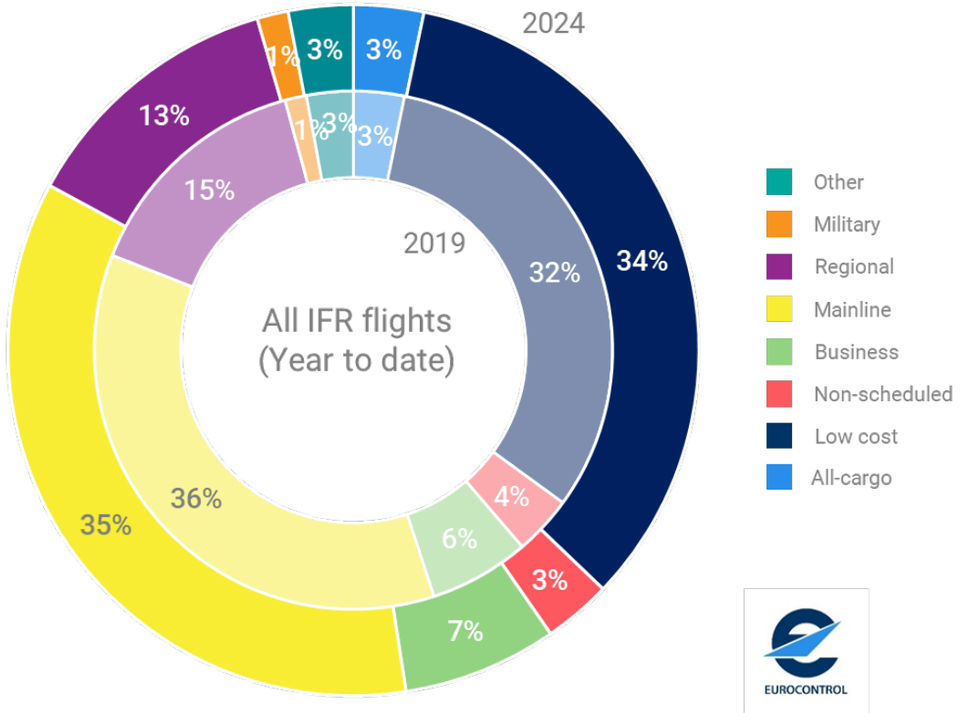
Compared to the equivalent week in 2023

Dep/Arr flights for week 23-29 Sep 2024



Market segments in the EUROCONTROL Network

Average share of total flights (year to date)

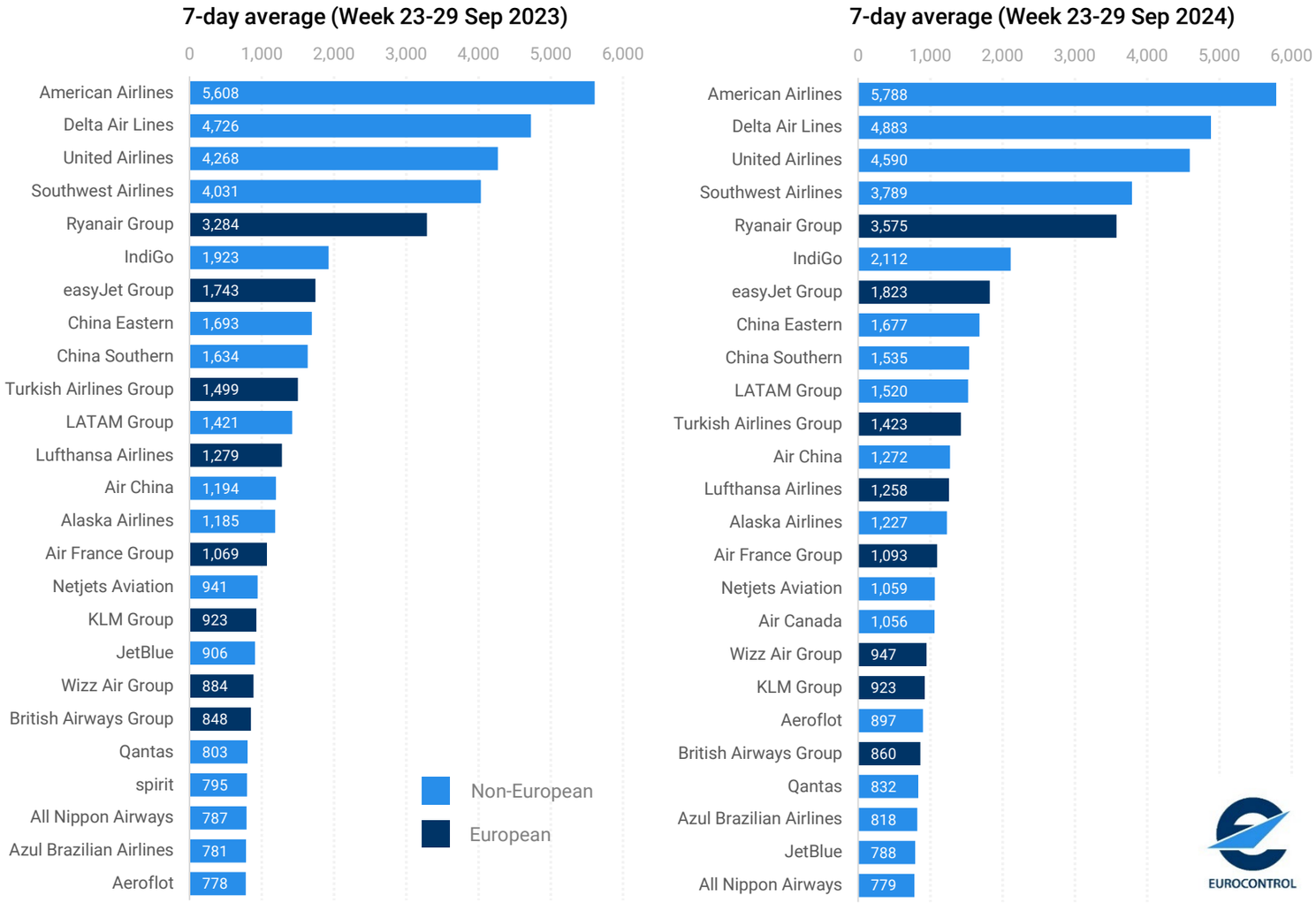


No.	Market segment	Avg. flights	% prev week	% prev year	% 2019
1.	Low Cost	11,649	-1%	+7%	+9%
2.	Mainline	11,292	-1%	+4%	-4%
3.	Regional	4,065	-1%	+1%	-15%
4.	Business	2,410	+0%	-2%	+15%
5.	Non-Scheduled	1,222	-3%	+4%	-22%
6.	All-cargo	1,022	+1%	-1%	+6%
7.	Other	954	-11%	-9%	+30%
8.	Military	520	+9%	+5%	-10%

- 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 (Charter) (-3%). Business Aviation is the exception (stable).
- Excluding 'Other', three market segments are recording flights above 2019 levels: All-cargo (+6%), Business Aviation (+15%) and Low Cost (+9%). Mainline was 4% below the 2019 levels while Regional and Non-Scheduled recorded 2-digit decreases (respectively -15% and -22%).

Top 25 global aircraft operators

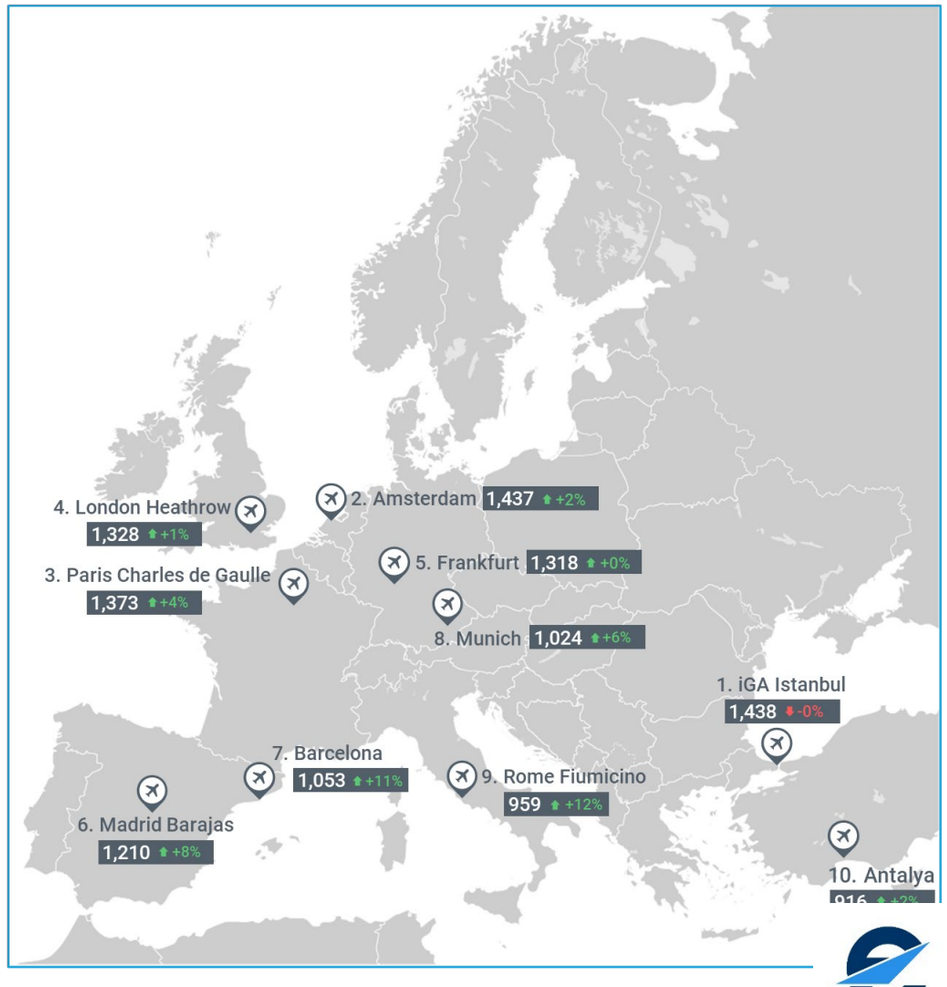
(average daily departure flights)



Source: Flightradar24 Historical Global Utilisation data

- Over the last week, eight European airlines are ranked in the top 25 global aircraft operators.
- This situation is broadly similar to the same week last year except Wizz Air outpacing KLM Group.
- Ryanair, the busiest European aircraft operating group, is currently 5th, similar to the same week last year.
- Seven more European carriers make the top 25: easyJet Group (7th position), Turkish Airlines Group (11th), Lufthansa Airlines (13th), Air France Group (15th), Wizz Air Group (18th), KLM Group (19th) and British Airways Group (21st).

Top 10 airports



Airport ranking

Week 23-29 Sep 2024

See more

No.	Airport	Avg. daily dep/arr flights	% prev week	% prev year	% 2019
1.	iGA Istanbul	1,438	-2%	-0%	+16%
2.	Amsterdam	1,437	-0%	+2%	-5%
3.	Paris Charles de Gaulle	1,373	-1%	+4%	-8%
4.	London Heathrow	1,328	-2%	+1%	+2%
5.	Frankfurt	1,318	-0%	+0%	-15%
6.	Madrid Barajas	1,210	-1%	+8%	-2%
7.	Barcelona	1,053	+0%	+11%	-0%
8.	Munich	1,024	+1%	+6%	-19%
9.	Rome Fiumicino	959	-1%	+12%	+4%
10.	Antalya	916	-1%	+2%	+10%

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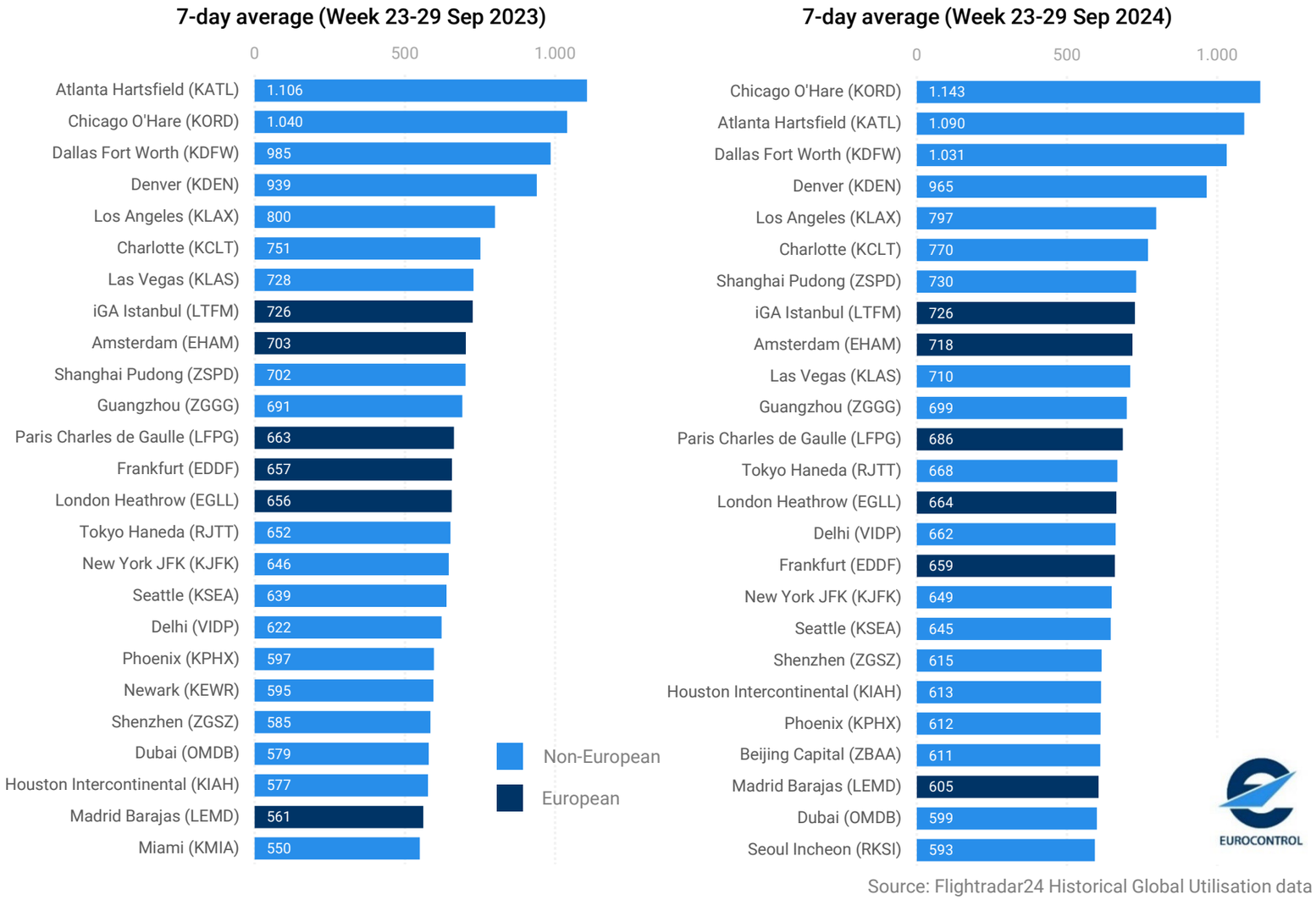
- Compared to the previous edition, the order of the top 10 airports remained unchanged.
- iGA Istanbul (1,438 flights per day, -2% vs previous week) remained the busiest airport, followed by Amsterdam (1,437, -0%) and Paris CDG (1,373, -1%).
- All but one airport (from the top 10) recorded higher flights than in 2023.
- Four of the top 10 airports (iGA Istanbul, London Heathrow, Rome and Antalya) are currently handling traffic above their 2019 levels (respectively +16%, +2%, +4% and +10%).

Top 25 global airport departures

(average daily departure flights)



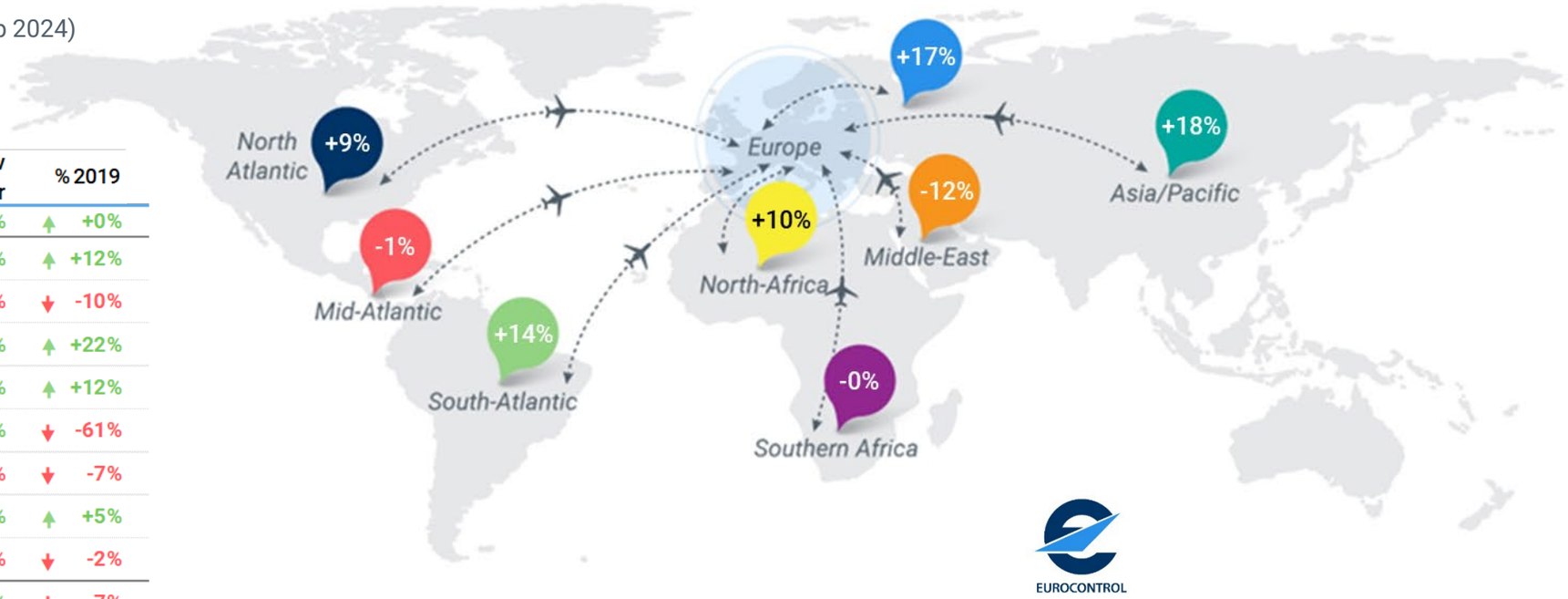
Source: Flightradar24 Historical Global Utilisation data

- Over the last week, six European airports appear in the top 25 of global airport departures (as in the corresponding week of 2023).
- This situation is broadly similar to the same week last year except the ranking of Frankfurt which moved down after London Heathrow.
- There are three European airports in the top 12 with iGA Istanbul (8th), Amsterdam (9th) and Paris CDG (12th).
- The other European airports in the top 25 are London Heathrow (14th), Frankfurt (16th) and Madrid Barajas (23rd).

Traffic flows

(average daily departure/arrival flights for week 23-29 Sep 2024)

Region	Average daily flights	% prev week	% prev year	% 2019
Intra-Europe	26,091	-1%	+4%	+0%
Europe ↔ North Atlantic	1,568	-1%	+9%	+12%
Europe ↔ Middle-East	1,335	-4%	-12%	-10%
Europe ↔ North-Africa	1,295	-1%	+10%	+22%
Europe ↔ Asia/Pacific	917	+1%	+18%	+12%
Europe ↔ Other Europe	487	+1%	+17%	-61%
Europe ↔ Southern Africa	286	-3%	-0%	-7%
Europe ↔ South-Atlantic	200	+1%	+14%	+5%
Europe ↔ Mid-Atlantic	148	-0%	-1%	-2%
Non Intra-Europe	6,236	-1.4%	+5%	-7%



- The main traffic flow - intra-European - recorded 26,091 daily flights last week, 1% fewer than the previous week. Intercontinental flows amounted to 6,236 daily flights on average, below (-1%) the previous week.
- The second-largest flow is with North Atlantic, with 1,568 flights per day (1% decrease compared to the previous week, especially on flows US « UK, US « Germany, US « Italy).
- The third-largest flow is with the Middle East with 1,335 average daily flights (-4% decrease compared to the previous week, owing to large decreases on flows between ECAC and Iran, Israel and Lebanon). The fourth is with North Africa, with 1,295 daily flights (1% decrease compared to the previous week).
- The flow between Europe and the Asia/Pacific region (fifth largest flow) recorded 917 flights per day and is 1% above the previous week. The flow ECAC « China/Hong Kong is the busiest (306 flights/day) followed by ECAC « India (123 flights/day). The flow between Europe and the Asia/Pacific region is now 12% 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 23-29 Sep 2024

No.	Country pair	Average daily flights	% prev week	% prev year	% 2019
1.	UK ↔ US	333	-2%	-1%	+5%
2.	Germany ↔ US	169	-2%	-3%	-6%
3.	France ↔ US	145	+7%	+5%	+10%
4.	Italy ↔ US	105	-4%	+13%	+26%
5.	Spain ↔ US	82	-2%	+16%	+1%
6.	Netherlands ↔ US	80	+1%	+1%	-6%
7.	Ireland ↔ US	79	-0%	+8%	+7%
8.	UAE ↔ UK	61	-2%	+4%	-8%
9.	Türkiye ↔ US	48	+1%	+13%	+106%
10.	Canada ↔ UK	47	-7%	+5%	-6%

- 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 only non-US related long-haul flows within the top 10 are UAE ↔ UK and Canada ↔ UK.
- Three long-haul flows posted increases on the previous week, notably France ↔ US (+7%), Netherlands ↔ US (+1%) and Türkiye ↔ US (+1%).
- All but two of the top long-haul flows recorded positive growth vs 2023, the most dynamic being Spain ↔ US (+16%), Türkiye ↔ US (+13%), Italy ↔ US (+13%) and Ireland ↔ US (+8%).
- Six flows are currently at or above 2019 levels, notably: Türkiye ↔ US (+106%) owing to Turkish Airlines expansion (doubling flights on some flows: iGA Istanbul ↔ Dallas, iGA Istanbul ↔ Seattle) as well as Italy ↔ US (+26%) and France ↔ US (+10%).

Economics

Week 23-29 Sep 2024

27 Sep 2024
avg fuel price:

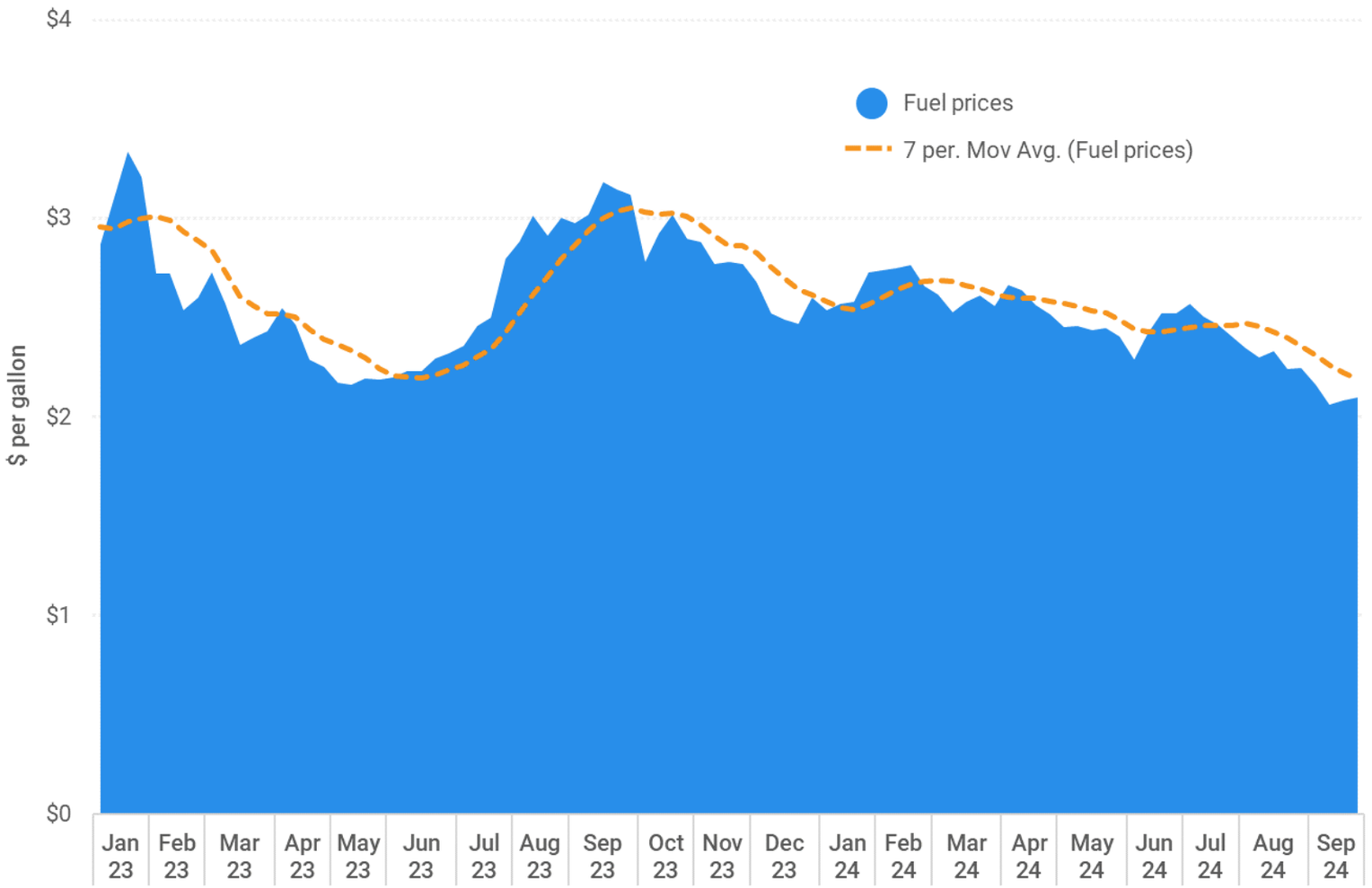
$2.10 /gallon

2%
vs. $2.06 /gallon
on 13 Sep 2024

Source: IATA/Platts

- The average price of jet fuel remained quite stable at 2.10 USD/gallon on 27 September 2024, a 2% increase compared to the level of two weeks ago.
- Since September 2023, the 7-day average fuel price has generally been decreasing (-32% between September 2023 and September 2024), except 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 Q3 2024.

Jet fuel price (Europe)



Source: IATA/Platts

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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