SUPPORTING
EUROPEAN
AVIATION

EUROCONTROL

AVIATION
INTELLIGENCE+

EUROCONTROL

EUROPEAN AVIATION OVERVIEW

18-24 Nov 2024

Thursday 28 November 2024

Headlines

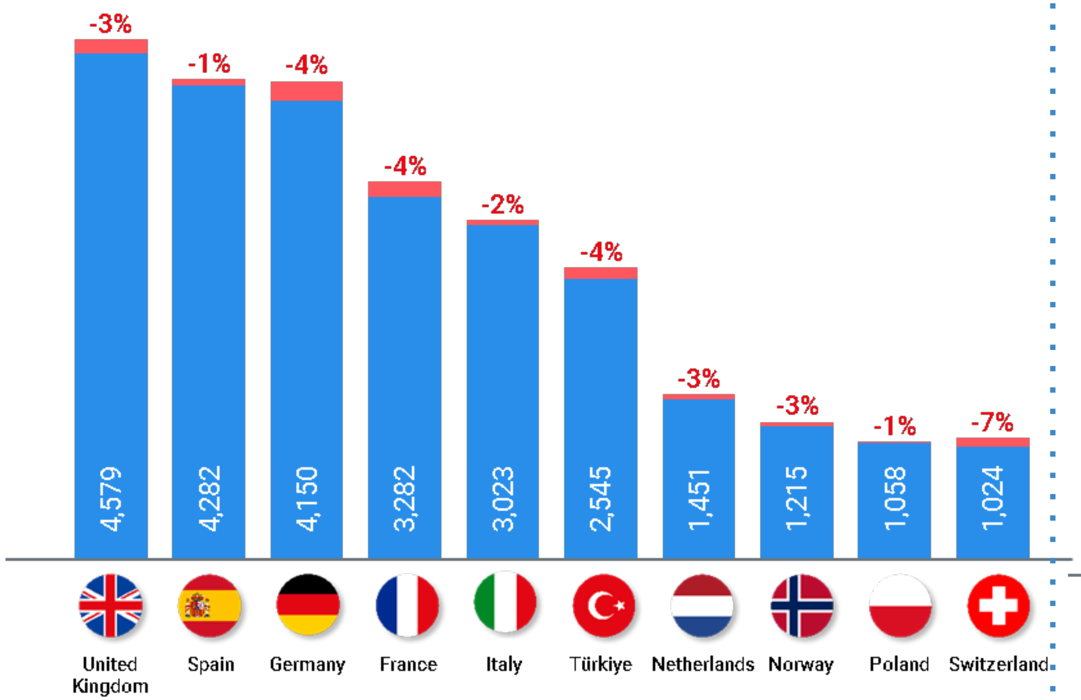
(Week 18-24 Nov 2024)

- The network recorded 25,085 average daily flights (+4% vs 2023).
- All States within the top 10 have recorded less traffic (-2.9%) compared to the previous week's average.
- Network traffic (flights) for November so far is at 96% of 2019 levels. Locally, the situation is more diverse.
- Year-to-date traffic is 96% of 2019, 5% more than 2023.
- En-route ATFM delays were higher than in the previous week (+50%), with an average of approximately 18,600 daily minutes. This is 20% lower than in 2023 and represents, on average, 0.74 min/flight.
- ATC capacity/staffing was the top delay cause last week (63% of all en-route ATFM delays), followed by "Others" (36%, including system transition at Paris ACC).
- The average jet fuel price was at 2.17 USD/gallon on 22 November 2024, a 2% decrease over two weeks.
- During the first nine months of the year 2024, the main European airlines (sample of 10 biggest airlines/airline groups) posted positive operating results. Four of them managed to improve their operating profits compared to Q1-3 of 2023. In our sample, the aggregated operating results for Q3 2024 were as good as those for Q3 2023, which were particularly strong.

Top 10 busiest States

On week 18-24 Nov 2024

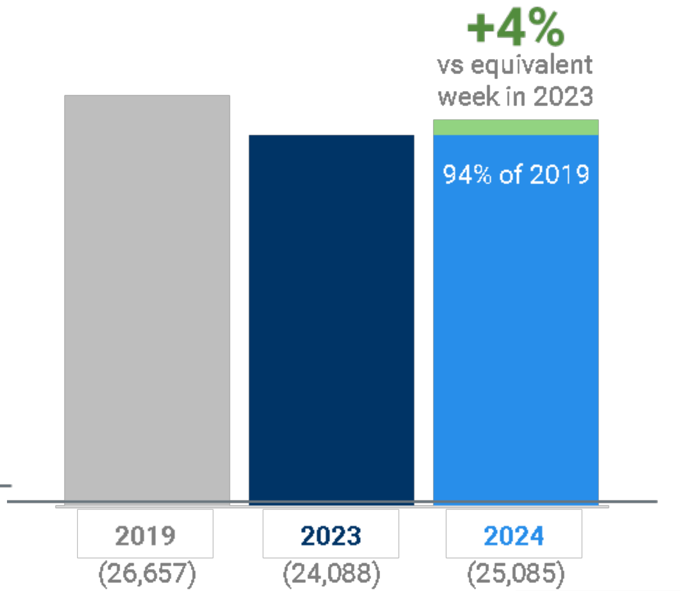
(all flights excl. overflights compared with previous week)



Traffic situation

Average daily flights (including overflights)

Week 18-24 Nov 2024

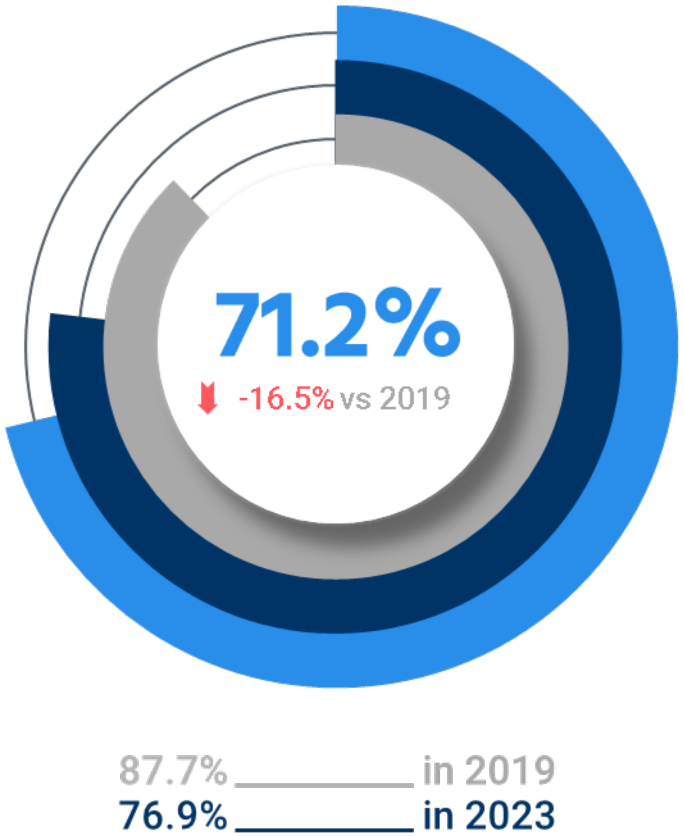


Arrival & departure punctuality

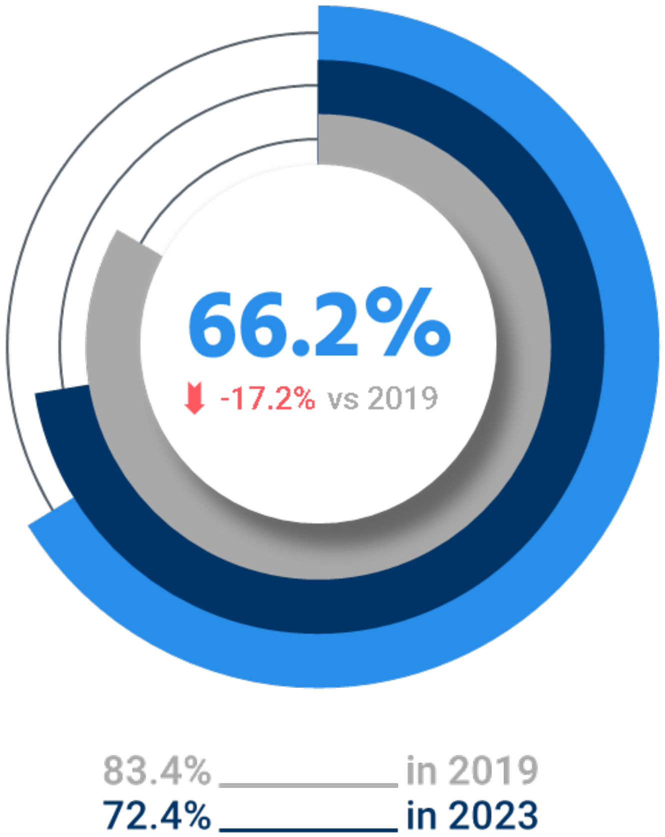
(all network scheduled flights)

Week 18-24 Nov 2024

ARRIVAL PUNCTUALITY



DEPARTURE PUNCTUALITY



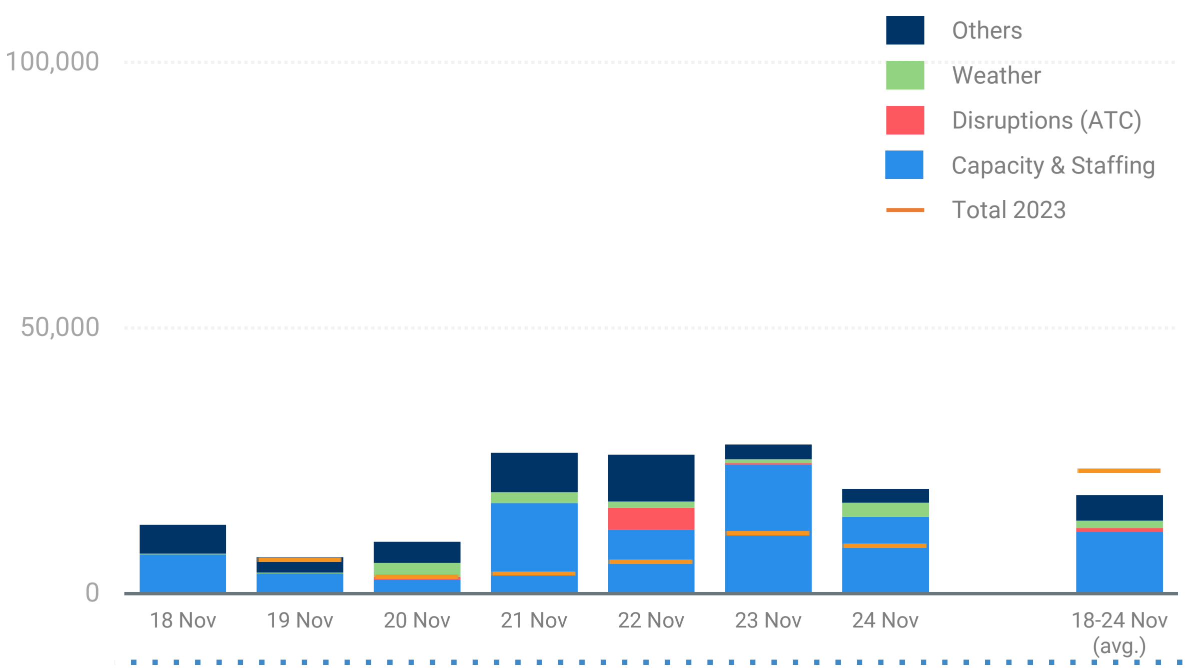
The pictures show the share of flights arriving/departing no later than 15 minutes after/before the scheduled time (OTP15).

- Compared to the equivalent week in 2023, arrival punctuality decreased to 71.2%, and departure punctuality also deteriorated by 6.2 percentage points to 66.2%. Compared to the same week in 2019, both indicators recorded a significant drop.
- Seasonal weather (snow/icy conditions and high winds) were the main driver for delay in the network.
- Snow affected Paris airports on 21 and 22 November, as well as Amsterdam Schiphol. Stockholm and Zurich also saw delays due to snow.
- Madrid suffered from fog on 19 and 20 November.
- Frankfurt saw RWY25R/07L closed on 19 November for urgent maintenance; this was coupled with high winds and a low cloud base, generating high delays.
- A security incident at London Gatwick on 22 November saw the South terminal evacuated, resulting in many cancellations and significant passenger disruption.
- Storm Bert caused significant disruption in the UK and Ireland over the weekend of 23 and 24 November. London airports were all impacted; the strong southerly winds meant that arrivals into Heathrow and Gatwick struggled due to crosswinds.

En-route ATFM delays

Delays per cause (EUROCONTROL Area)

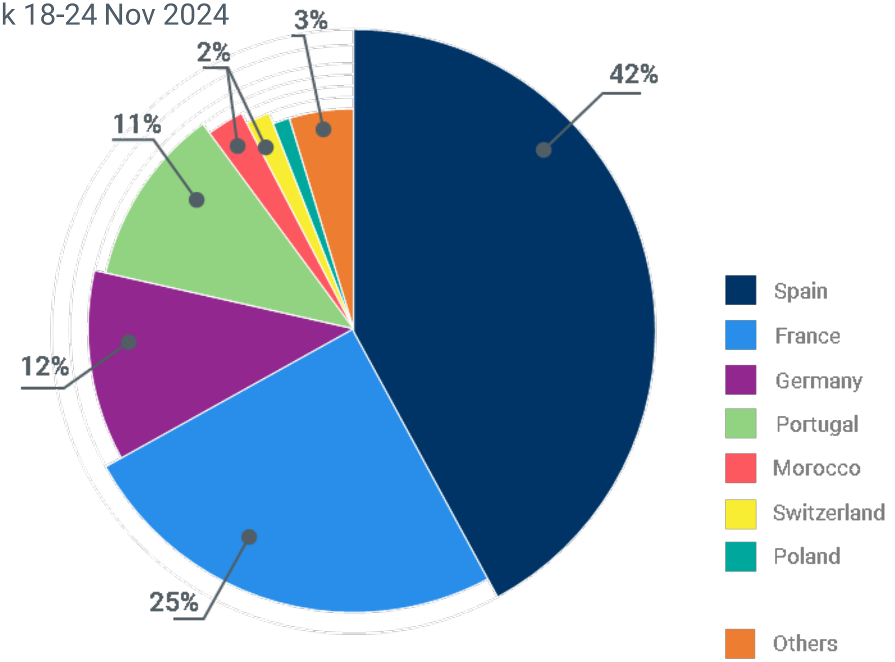
In minutes (total daily and 7-day average) in 2024



- Week 47 (18 - 24 Nov) registered higher delays than Week 46, with an average of 18,567 daily minutes. However, these en-route ATFM delays were 20% lower than for the same operational week of 2023.
- ATC capacity/staffing were responsible for 63% of all en-route ATFM delay, especially in Spanish ACCs: Canarias, Lisboa, Sevilla and Madrid.
- For November so far (1-24), en-route ATFM delay was 1% lower than in the same period in 2023.

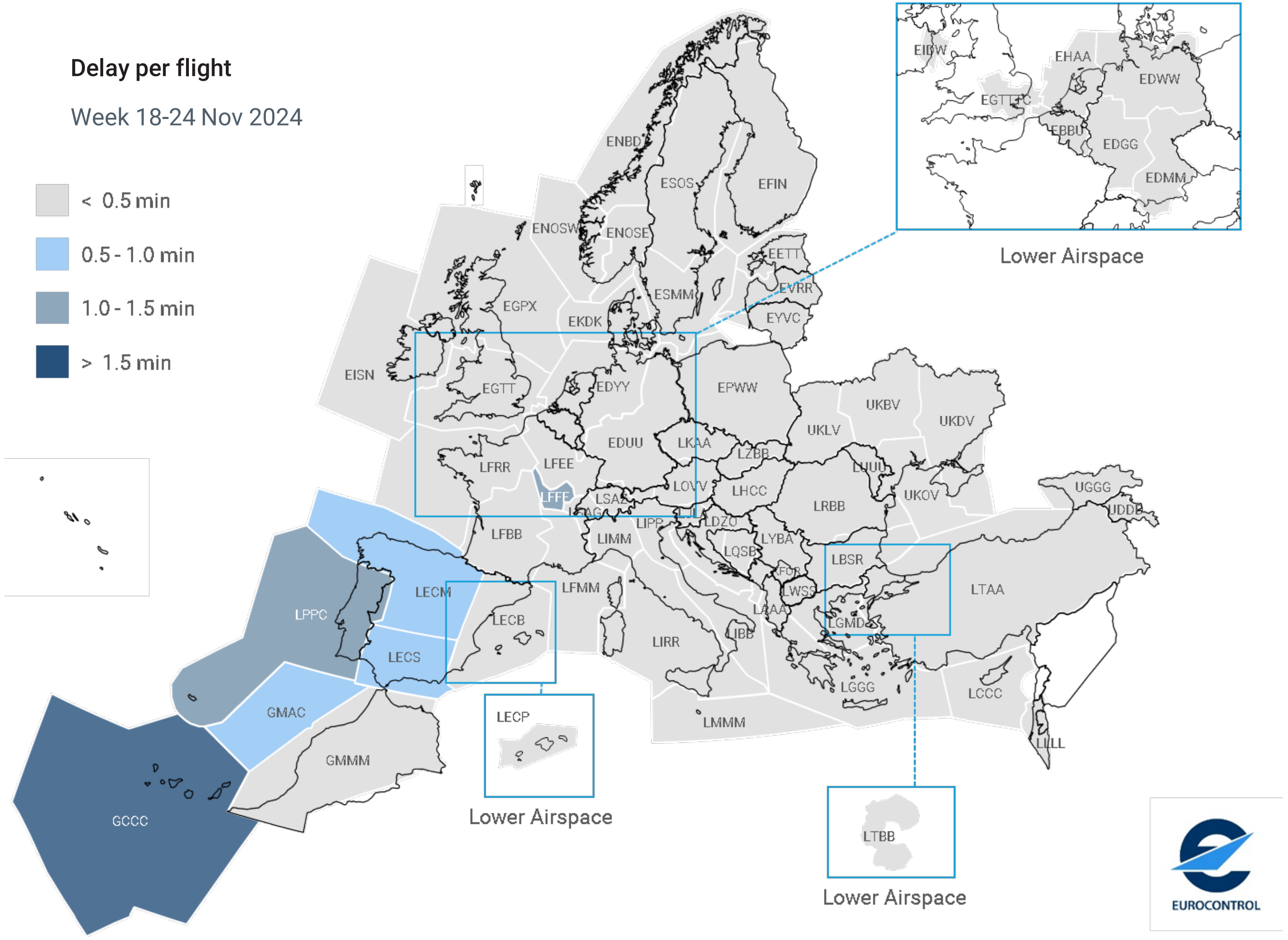
Share of en-route ATFM delays

Week 18-24 Nov 2024



- Spain accounted for 42% of all en-route ATFM delays, with main reason being caused by capacity issues and military exercise in Madrid ACC, and capacity issues in both Sevilla and Barcelona ACCs owing to increasing traffic in the South-West axis. Convective weather affected Canarias ACC too.
- France accounted for 25% of all en-route ATFM delays, with main reason being the transition to “4-Flight ATM system” in Paris ACC as well as staffing issues in Marseille ACC.
- Germany accounted for 12% of all en-route ATFM delays, mostly due to instability in the Flight Data Processing System in Karlsruhe UAC, .

En-route ATFM delayed flights per Area Control Centre



- In Week 47 (18 - 24 November), three ACCs recorded en-route ATFM delays higher than 1.0 min/flight.
- Canarias ACC recorded 3.1 min/flight. Traffic was 27% above 2019 levels. Some daily protective capacity measures were applied due to strong annual traffic growth apparent in the first weeks of the winter season. There was convective weather disruption on Wednesday and Sunday.
- Paris ACC recorded 1.5 min/flight. Almost all the delay was caused by the third week of the "4-Flight ATM system" implementation, which will last until 10 December. This involves sector capacity reductions of -25%, a flight reduction programme at Parisian airports, and a limitation on routes available to overflight traffic.
- Lisboa ACC recorded 1.2 min/flight. Traffic was +14% above 2019 levels. Some capacity measures were applied from Monday to Sunday (strong traffic demand). Saturday was the busiest and worst day for ATFM delays (capacity and staffing issues).
- Sevilla ACC recorded 0.9 min/flight. Traffic was +40% above 2019. Main ATFM delay cause was high demand and delays were heavily concentrated at the week-end.

Top 10 States

Departures and arrivals

Week 18-24 Nov 2024

See more

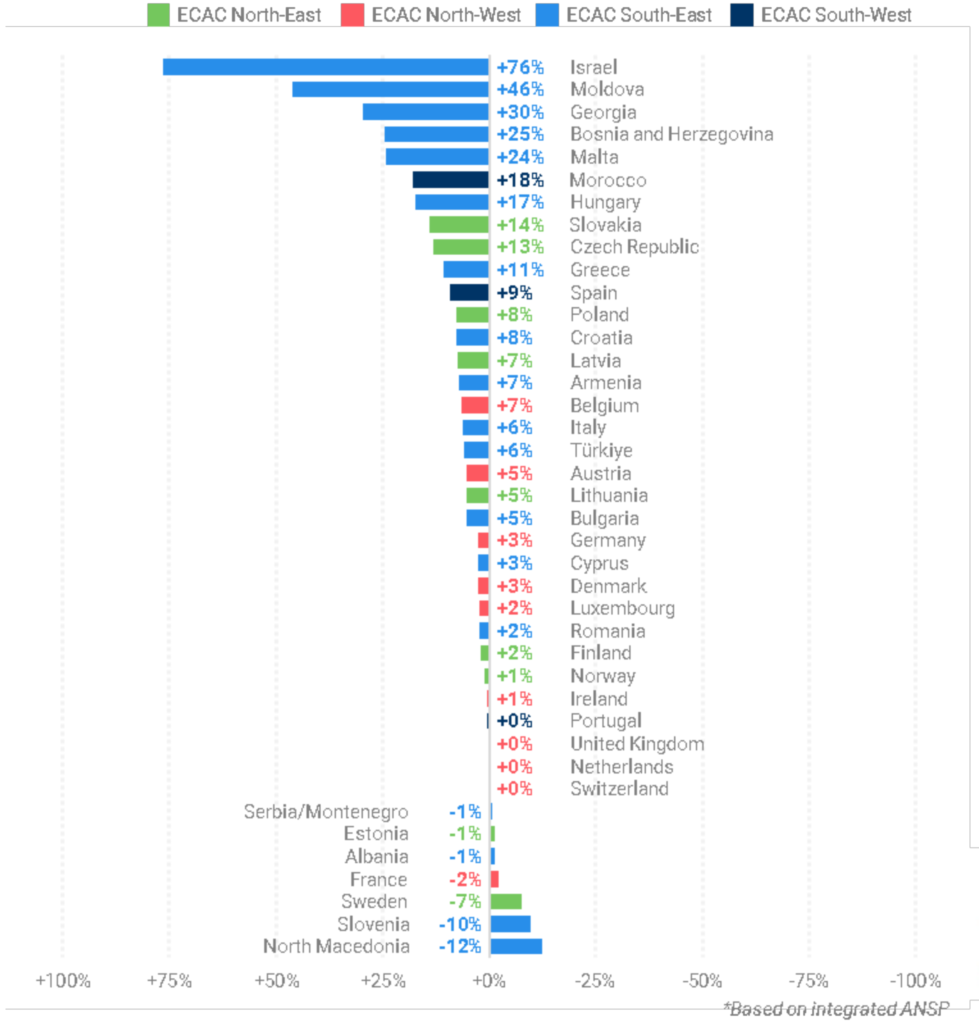
No.	Country	Average daily flights	% prev week	% prev year	% 2019
1.	United Kingdom	4,579	-3%	▲ +0%	▼ -7%
2.	Spain	4,282	-1%	▲ +9%	▲ +15%
3.	Germany	4,150	-4%	▲ +3%	▼ -18%
4.	France	3,282	-4%	▼ -2%	▼ -11%
5.	Italy	3,023	-2%	▲ +6%	▲ +1%
6.	Türkiye	2,545	-4%	▲ +6%	▲ +12%
7.	Netherlands	1,451	-3%	▲ +0%	▼ -6%
8.	Norway	1,215	-3%	▲ +1%	▼ -13%
9.	Poland	1,058	-1%	▲ +8%	▲ +1%
10.	Switzerland	1,024	-7%	▲ +0%	▼ -9%

- The top 10 States, in aggregate, recorded 2.9% fewer flights than in the previous week.
- Switzerland recorded the greatest decrease (-7%, mainly due to small operators, Swiss and easyJet) on the domestic flow and on the flows Italy ↔ Switzerland , Spain ↔ Switzerland and France ↔ Switzerland.
- Four States in the top 10 are recording traffic above 2019 levels (Spain, Türkiye, Poland and Italy), with the remainder between 6% and 18% below pre-COVID levels.
- Traffic from/to Israel increased by 76% vs the same week in November 2023, as the Israel-Hamas war started end October 2023. This traffic is still circa 38% below 2019 levels.

States in the EUROCONTROL Network

Compared to the equivalent week in 2023

Dep/Arr flights for week 18-24 Nov 2024



*Based on integrated ANSP

Top 10 aircraft operators

Week 18-24 Nov 2024 (avg daily flights)

See more

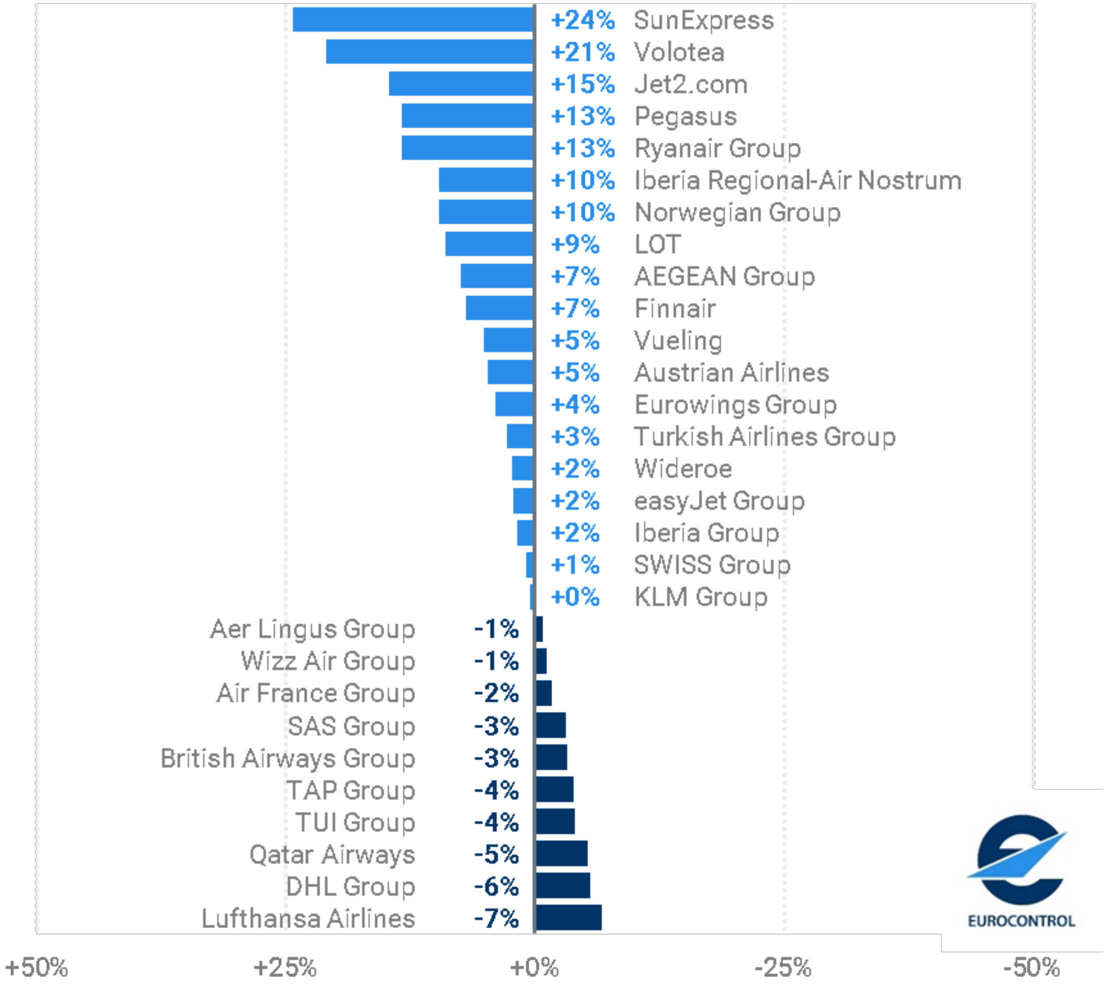
No.	Aircraft operator	Average daily flights	% prev week	% prev year	% 2019
1.	Ryanair Group	2,441	+0%	▲ +13%	▲ +24%
2.	Turkish Airlines Group	1,328	-2%	▲ +3%	▲ +7%
3.	easyJet Group	1,113	-3%	▲ +2%	▼ -12%
4.	Lufthansa Airlines	1,094	-1%	▼ -7%	▼ -25%
5.	Air France Group	841	-6%	▼ -2%	▼ -24%
6.	Wizz Air Group	778	-0%	▼ -1%	▲ +45%
7.	KLM Group	777	-4%	▲ +0%	▲ +2%
8.	British Airways Group	764	-5%	▼ -3%	▼ -9%
9.	SAS Group	571	-2%	▼ -3%	▼ -32%
10.	Vueling	546	-1%	▲ +5%	▲ +13%

- The top 10 aircraft operators, in aggregate, recorded 2% fewer flights than in the previous week.
- All but one of the top 10 aircraft operators recorded fewer number of flights than during the previous week. Ryanair was the only operator recording the same traffic levels as last week.
- Air France Group recorded the greatest decrease (-6%, mainly on flows France ↔ Algeria, France ↔ Spain, France ↔ Portugal and domestic France), mostly on flights departing from/arriving to Paris CDG (wintry conditions on Thursday and reductions due to "4-Flight AT system" implementation).
- Compared to 2023, half of the airlines/airline groups are recording more flights. Compared to 2019, half of the operators in the top 10 are recording more flights (Wizz Air, Ryanair, Vueling, Turkish Airlines and KLM Group).
- The highest traffic increase vs 2023 is for SunExpress (+24%) while the main decrease is for Lufthansa (-7%).

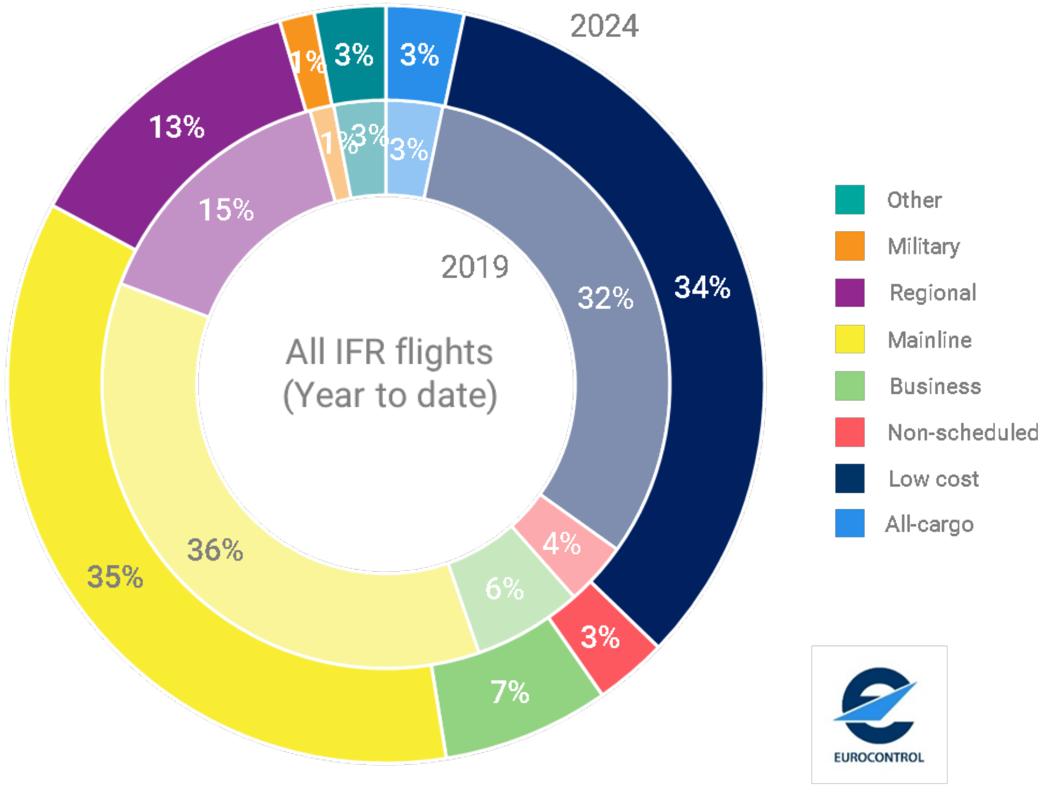
Aircraft operators in the EUROCONTROL Network

Compared to the equivalent week in 2023

Dep/Arr flights for week 18-24 Nov 2024



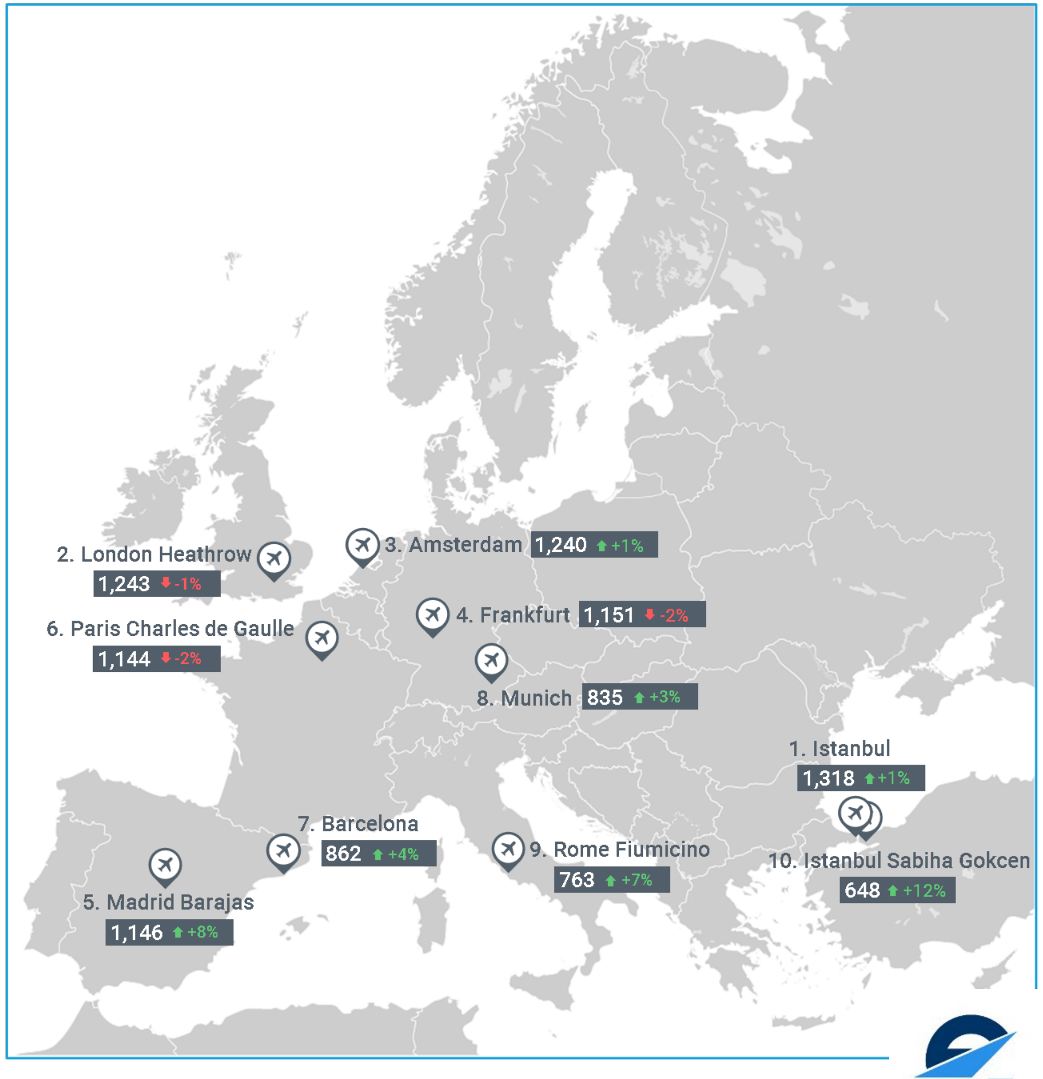
Market segments in the EUROCONTROL Network


Average share of total flights (year to date)

No.	Market segment	Avg. flights	% prev week	% prev year	% 2019
1.	Mainline	9,469	-2%	▲ +4%	▼ -7%
2.	Low Cost	7,748	-2%	▲ +9%	▲ +7%
3.	Regional	3,425	-2%	▼ -3%	▼ -18%
4.	Business	1,707	-4%	▲ +5%	▲ +14%
5.	All-cargo	1,059	+0%	▲ +1%	▲ +6%
6.	Other	723	-14%	▼ -7%	▼ -8%
7.	Non-Scheduled	496	-1%	▲ +7%	▼ -3%
8.	Military	461	-2%	▲ +0%	▼ -2%

- 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 number of passenger flights has declined owing to the lull of the Winter season, especially Low Cost (-2%) and Non-Scheduled (-1%). Mainline (-2 %), Regional (-2%), and Business Aviation (-4%). The number of flights in the Cargo market segment remained stable (+0%) compared to the previous week.
- Three market segment (excluding Military and Others) are recording flights above 2019 levels: All-cargo (+6%), Business (+14%) and Low Cost (+7%). Mainline and Non-Scheduled were respectively 7% and 3% below the 2019 levels while Regional recorded a 2-digit decrease (-18%).

Top 10 airports



Airport ranking

Week 18-24 Nov 2024

See more

No.	Airport	Avg. daily dep/arr flights	% prev week	% prev year	% 2019
1.	Istanbul	1,318	-2%	↑ +1%	↑ +15%
2.	London Heathrow	1,243	-4%	↓ -1%	↓ -2%
3.	Amsterdam	1,240	-3%	↑ +1%	↓ -5%
4.	Frankfurt	1,151	-1%	↓ -2%	↓ -13%
5.	Madrid Barajas	1,146	+0%	↑ +8%	↑ +2%
6.	Paris Charles de Gaulle	1,144	-3%	↓ -2%	↓ -10%
7.	Barcelona	862	-2%	↑ +4%	↑ +5%
8.	Munich	835	-2%	↑ +3%	↓ -22%
9.	Rome Fiumicino	763	-2%	↑ +7%	↑ +2%
10.	Istanbul Sabiha Gokcen	648	-1%	↑ +12%	↑ +6%

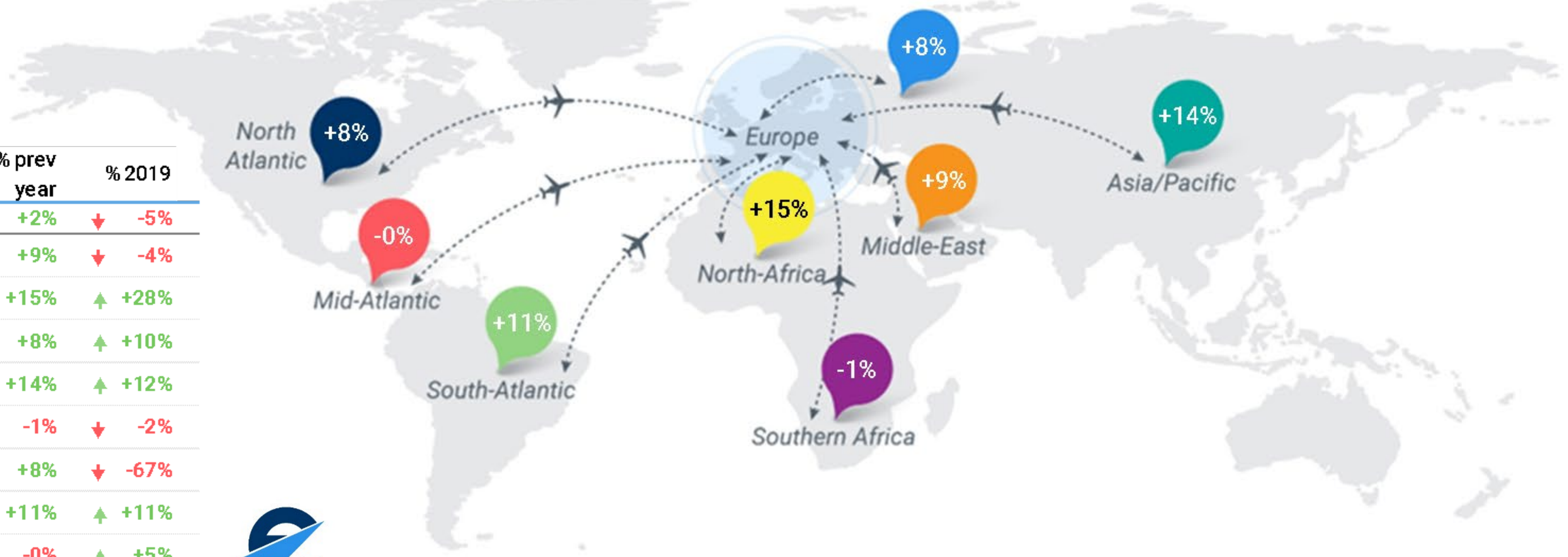
- Compared to the previous edition, there were some changes in the ranking: Paris CDG pushed down from the 4th rank (owing to the snowy episode and the system implementation) while Frankfurt and Madrid went up one place. Zurich disappeared from the 10th position and was replaced by Istanbul Sabiha Gokcen.
- Istanbul (1,318 flights per day, -2% vs previous week) is the busiest airport, followed by London Heathrow (1,243, -4%) and Amsterdam (1,240, -3%).
- All but three airports (from the top 10) recorded more flights than in 2023, and this was mostly weather-related (for Paris and London airports).
- Half of the top 10 airports (Istanbul, Madrid, Barcelona, Rome and Istanbul Sabiha Gokcen) are currently handling traffic above their 2019 levels.

EUROCONTROL

Traffic flows

(average daily departure/arrival flights for week 18-24 Nov 2024)

Region	Average daily flights	% prev week	% prev year	% 2019
Intra-Europe	18,896	↓ -3%	↑ +2%	↓ -5%
Europe ↔ Middle-East	1,271	↑ +1%	↑ +9%	↓ -4%
Europe ↔ North-Africa	1,175	↓ -4%	↑ +15%	↑ +28%
Europe ↔ North Atlantic	1,117	↑ +0%	↑ +8%	↑ +10%
Europe ↔ Asia/Pacific	888	↓ -1%	↑ +14%	↑ +12%
Europe ↔ Southern Africa	321	↑ +0%	↓ -1%	↓ -2%
Europe ↔ Other Europe	256	↓ -6%	↑ +8%	↓ -67%
Europe ↔ South-Atlantic	203	↑ +0%	↑ +11%	↑ +11%
Europe ↔ Mid-Atlantic	183	↑ +2%	↓ -0%	↑ +5%
Non Intra-Europe	5,413	↓ -1.0%	↑ +10%	↓ -2%



EUROCONTROL

- The main traffic flow - intra-European - recorded 18,896 daily flights last week, 3% fewer than the previous week. Intercontinental flows amounted to 5,413 daily flights on average, below (-1%) the previous week.
- The second-largest flow is with Middle-East, with 1,271 flights per day (+1% compared to the previous week owing to increases on flows Saudi Arabia ↔ Türkiye). The flow is recording traffic 9% above the same week in 2023 but 4% below 2019 levels (Israel).
- The third-largest flow is with North-Africa, with 1,175 average daily flights (-4% decrease compared to the previous week, owing mainly to decreases on flows with France).
- The fourth largest flow is with the North-Atlantic, with 1,117 daily flights (stable compared to the previous week).
- Flow between Europe and the Asia/Pacific region (888 flights per day, -1% on previous week) is recording traffic 14% above the same week in 2023 and 12% above 2019 levels.
- Flows with ‘Other Europe’ (including the Russian Federation) remain massively reduced at -67% compared to 2019.

Top 10 long-haul country pairs

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

Week 18-24 Nov 2024

No.	Country pair	Average daily flights	% prev week		% prev year		% 2019
1.	UK ↔ US	275	+1%	▲	+6%	▼	-2%
2.	Germany ↔ US	142	-3%	▼	-2%	▼	-7%
3.	France ↔ US	102	-0%	▼	-2%	▲	+3%
4.	Netherlands ↔ US	65	-1%	▼	-5%	▼	-1%
5.	UAE ↔ UK	65	+2%	▼	-0%	▼	-2%
6.	Spain ↔ US	59	+1%	▲	+13%	▲	+14%
7.	Ireland ↔ US	52	+2%	▲	+12%	▲	+8%
8.	Italy ↔ US	50	-1%	▲	+14%	▲	+27%
9.	Russia ↔ UAE	47	+6%	▲	+20%	▲	+897%
10.	Germany ↔ UAE	46	+1%	▲	+7%	▲	+7%

- Seven 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, Russia ↔ UAE and Germany ↔ UAE.
- Six long-haul flows posted increases in number on the previous week: UK ↔ US, Spain ↔ US, Germany ↔ UAE, (+1% each), UAE ↔ UK, Ireland ↔ US (+2% each) and Russia ↔ UAE (+6 %).
- All but four of the top long-haul flows recorded less traffic vs 2023, notably Germany ↔ US (-2%), France ↔ US (-2%) and Netherlands ↔ US (-5%).
- Six flows are currently above 2019 levels, notably Russia ↔ UAE (+897%), Italy ↔ US (+27%) and Spain ↔ US (+14%).

Economics

Week 18-24 Nov 2024

22 Nov 2024
avg fuel price:

$2.17 /gallon

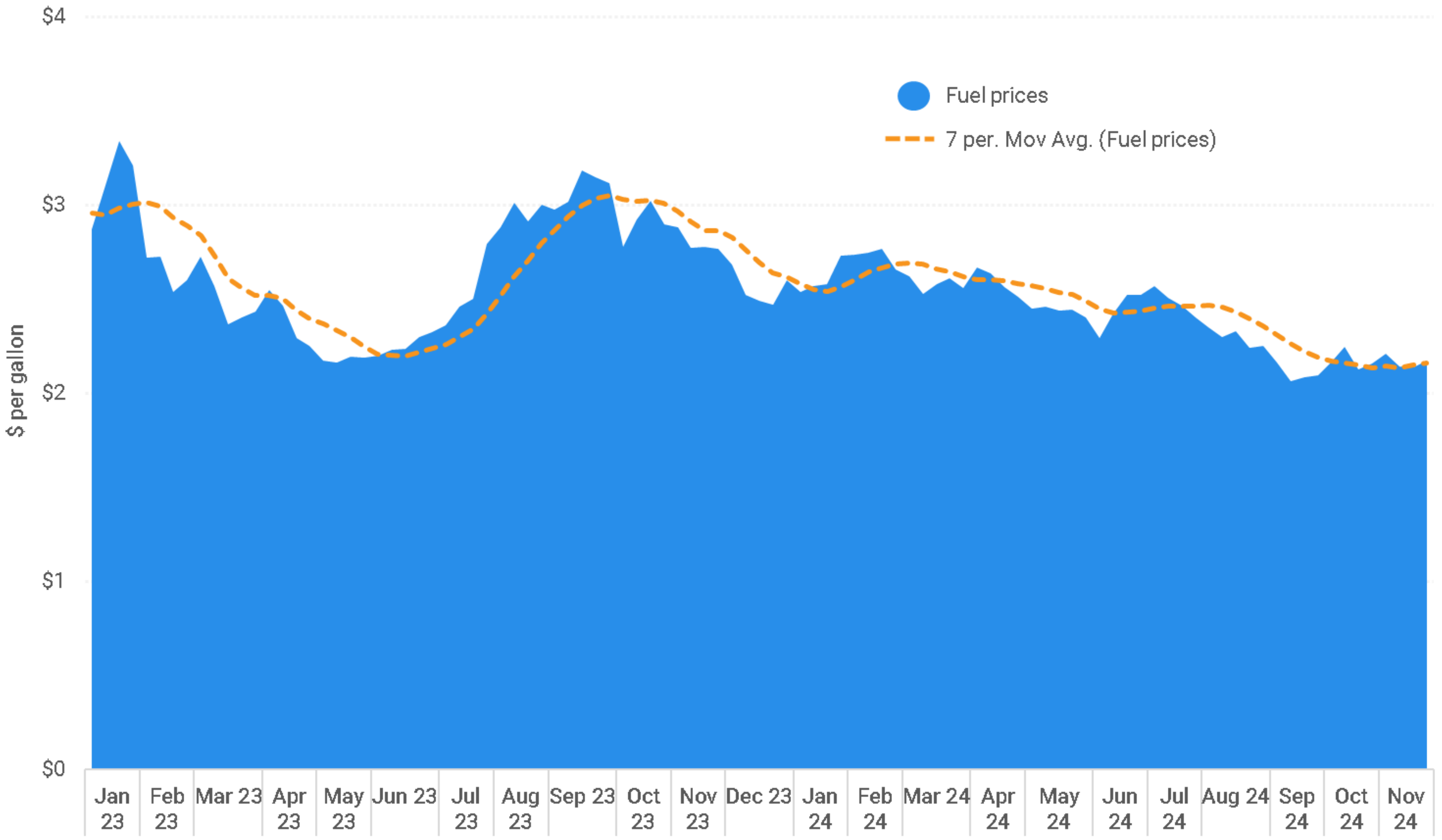
-2%

vs. $2.21 /gallon
on 08 Nov 2024

Source: IATA/Platts

- The average price of jet fuel closed at 2.17 USD/gallon on 22 November 2024, a 2% 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.

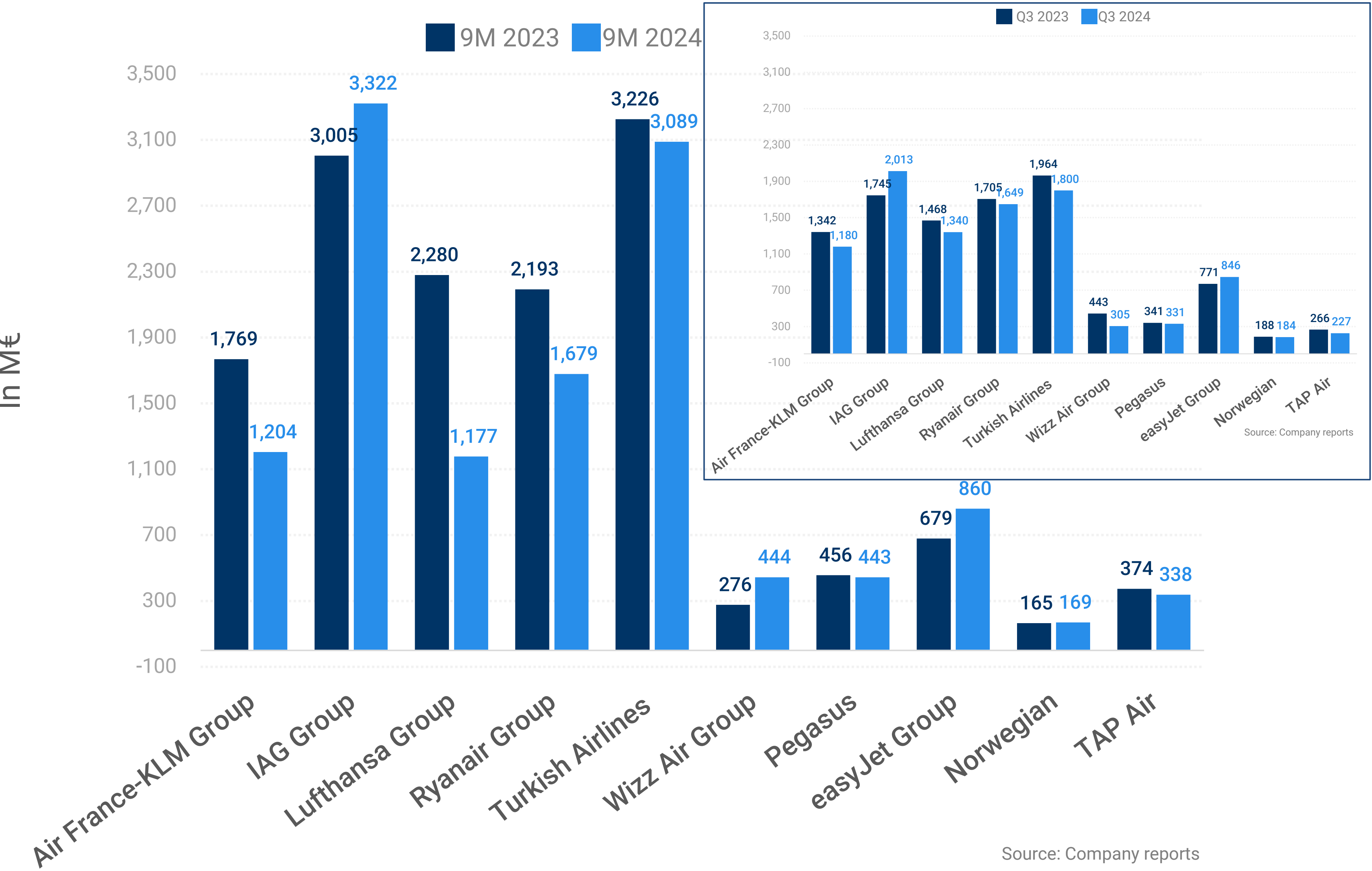
Jet fuel price (Europe)



Source: IATA/Platts

Operating profits of airlines

In M€ in 2023 and 2024



Source: Company reports

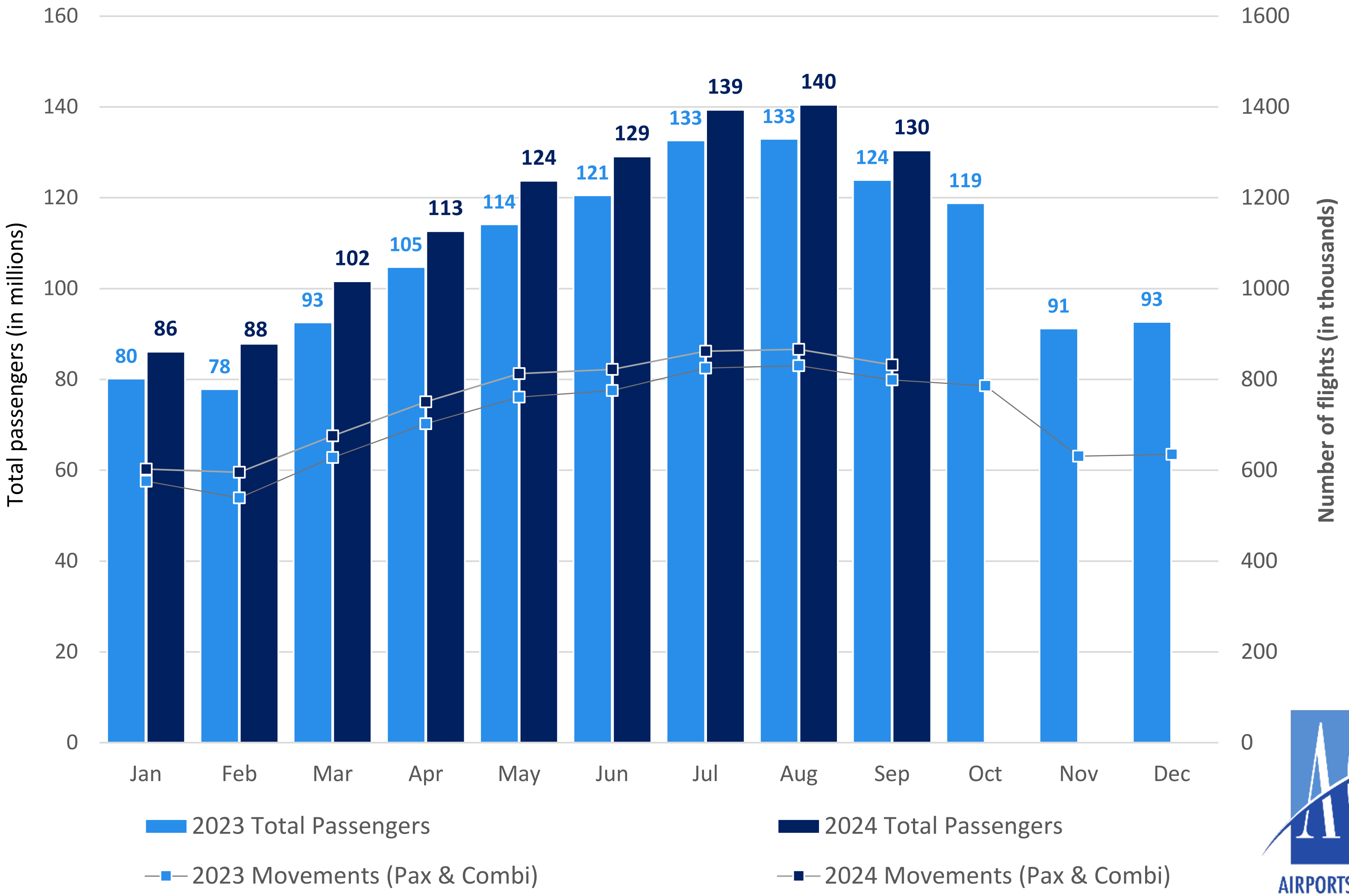
Source: Company reports

- In this top 10, all airlines/airline groups posted positive operating results over the first nine months of 2024 (9M 2024). Results were not available for SAS.
- Four of the airlines/airline groups in this sample managed to improve their profits on previous period (9M 2023): IAG Group, Wizz Air Group, easyJet Group and Norwegian Group.
- It is to be noted that these results were particularly driven by the good performance during Q3 2024, although summer 2023 performance was even stronger.
- IAG Group recorded the highest operating profit (3,322 M€, +11% on 9M 2023) benefiting from increased passenger volumes and capacity expansion, particularly on transatlantic routes. Iberia and British Airways outperformed other elements of the Group.
- Lufthansa Group recorded a lower operating profit (-48%) in 9M 2024 compared to the same period in 2023 due to increased operating costs, driven by inflation and the expansion of business operations, aircraft delivery delays and passenger compensation (flight delays and cancellations caused by strikes in Germany).
- Airlines in this sample recorded 12.7 Bn€ operating profit in the first nine months of 2024, a 12% decrease on the same period in 2023 (14.4 Bn€).

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 130 **million in** September 2024, **5.2%** more than in the same period in **2023**, with a total of 832,000 flights in the same period in 2024, a 4% increase on previous year.
- For the first nine months of 2024, the number of passengers(*) reached 1.05 **billion**, **7.3%** more than in the same period in **2023**, with a total of 6.81 million flights in the same period in 2024, a 6% increase on previous year.
- The respective **recovery** rates **on 2019** levels for January-September 2024 were **101%** in **passenger numbers** and **94%** in terms of **flights**.

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

AIRPORTS COUNCIL INTERNATIONAL

SUPPORTING
EUROPEAN
AVIATION

EUROCONTROL

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

www.eurocontrol.int