AVIATION INTELLIGENCE+

EUROCONTROL

EUROPEAN AVIATION OVERVIEW

26 Feb - 03 Mar 2024

Wednesday 06 March 2024

Headlines

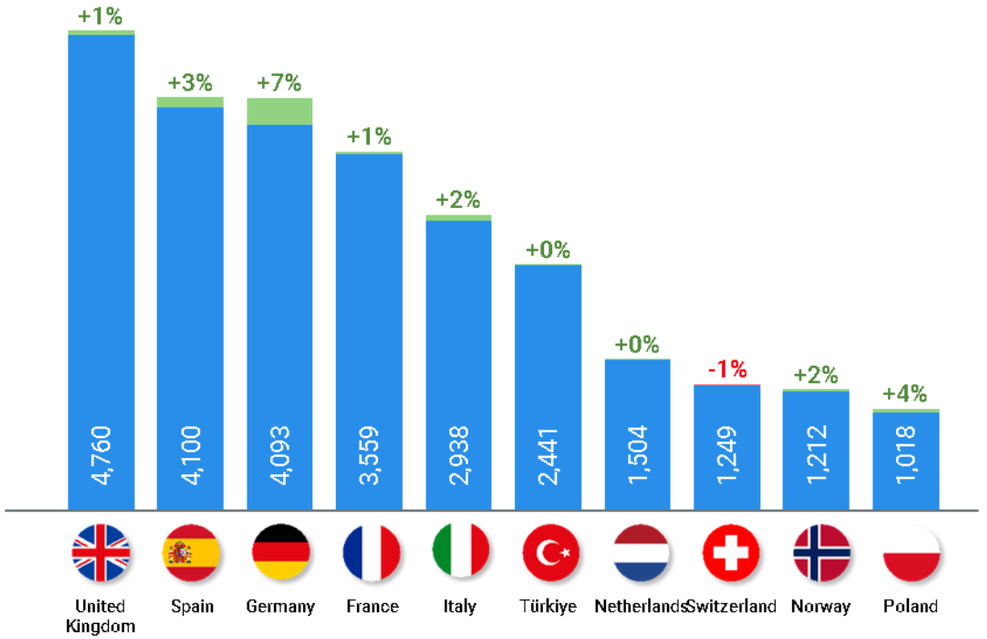
(Week 26 Feb - 03 Mar 2024)

- The Network recorded 24,861 average daily flights (+5% vs 2023). The average number of flights was 2% higher than in the previous week.
- Last week, Network traffic was at 92% of 2019 levels.
- On average, the top 10 carriers increased their capacities by 2% compared to the previous week.
- Similarly, the top 10 states saw their flights increasing by 2%. Growth in Germany, higher than in other States, should be treated with caution due to the recovery of Lufthansa from the ground handlers' industrial action in week 8.
- Flows between Europe and Asia/Pacific have now recovered to their 2019 levels, after continuous recovery of flows from/to China.
- En-route ATFM delays averaged at the relatively low value of 8,000 minutes per day (0.32 min/flight). Capacity/staffing issues were the main cause (78%), notably in Lisbon ACC as high demand for the Canaries continues to generate strong overflights, resulting in some delays.
- Arrival and departure punctuality, at 80.1% and 74.6% respectively, were in line with the equivalent week in 2023 but slightly below the 2019 levels.
- The average jet fuel price stood at 2.62 USD/gallon on 1 March 2024, a 5% decrease over two weeks.

Top 10 busiest States

On week 26 Feb - 03 Mar 2024

(all flights excl. overflights compared with previous week)



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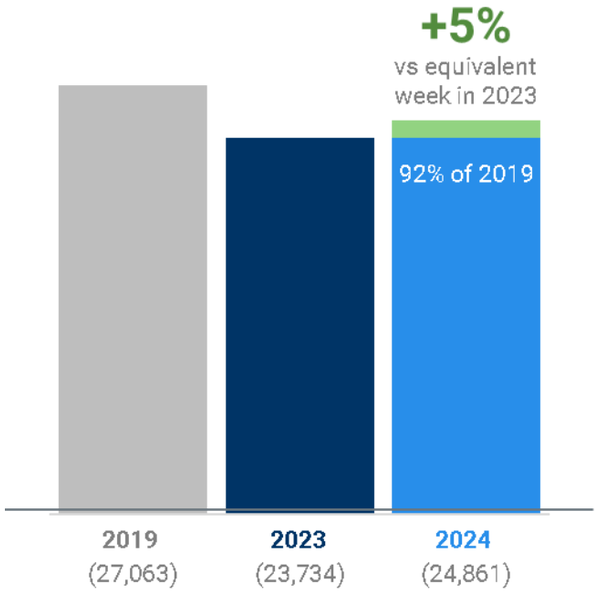
Traffic situation

Average daily flights (including overflights)

Week 26 Feb - 03 Mar 2024



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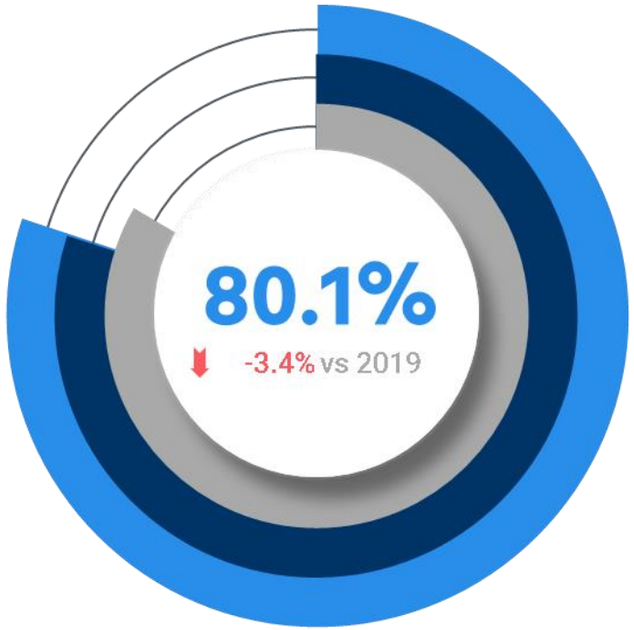
Arrival & departure punctuality

(all network scheduled flights)

Week 26 Feb - 03 Mar 2024

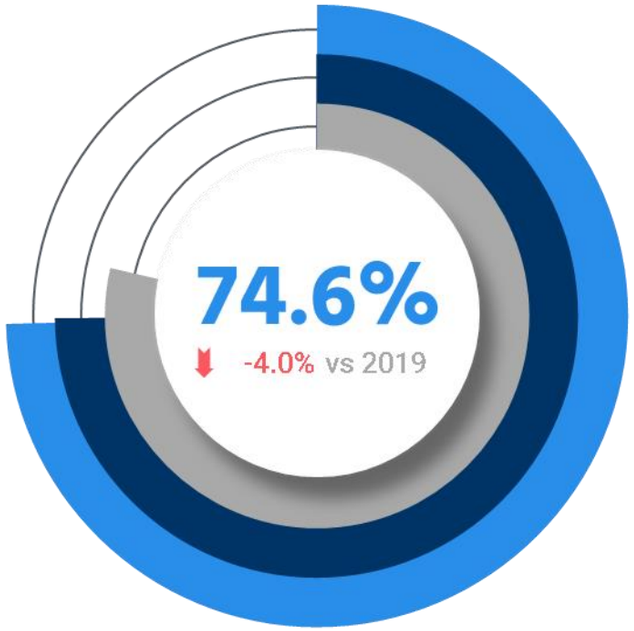
ARRIVAL PUNCTUALITY



83.5% _____ in 2019

80.0% _____ in 2023

DEPARTURE PUNCTUALITY



78.6% _____ in 2019

74.9% _____ in 2023

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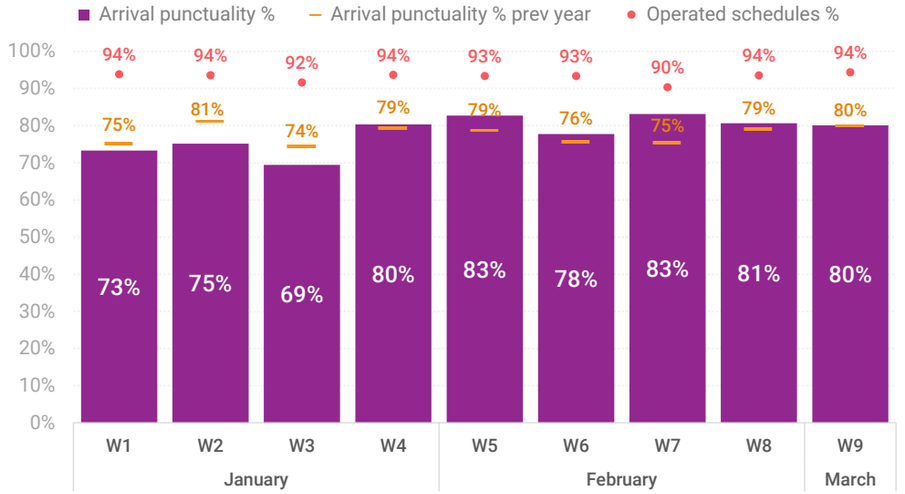
- In Week 9 (26 February – 3 March), the arrival punctuality at airports was 80.1% while the departure punctuality at airports was 74.6%. Both values were in line with last year's punctuality figures, but worse than the 2019 ones, even though there were fewer flights in the network.
- In February (weeks 5 to 8), the arrival punctuality averaged 81%, slightly better (+4 pp) than in 2023.
- So far this year, overall, arrival punctuality is 78%, in line with 2023.

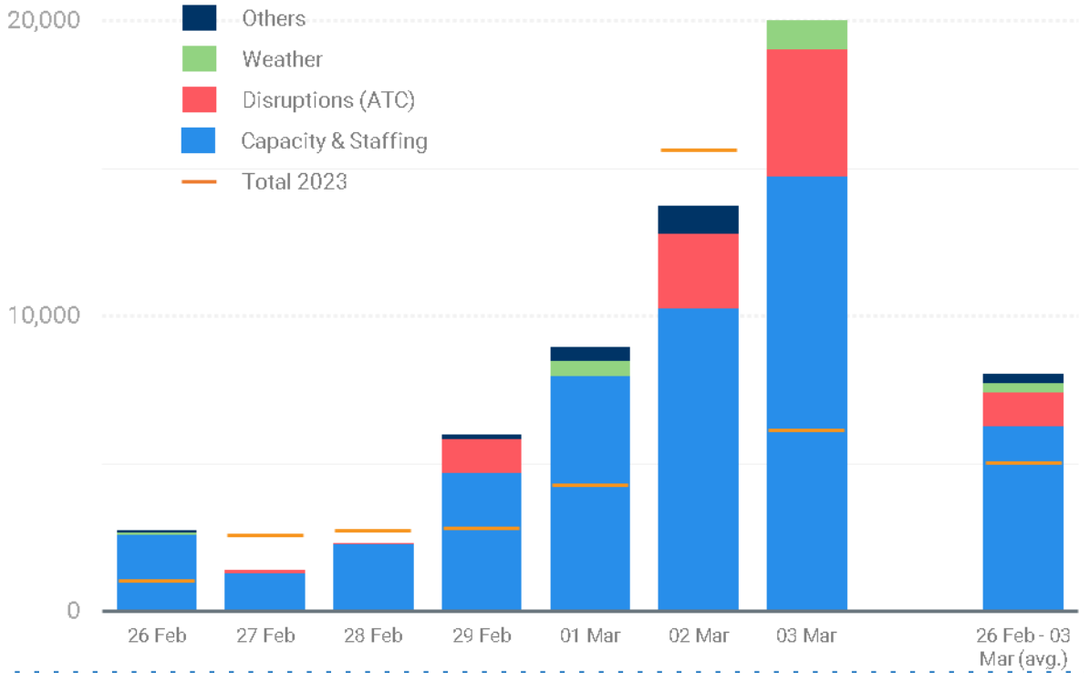


The pictures show the share of flights arriving/departing no later than 15 minutes after/before the scheduled time (OTP15).

En-route ATFM delays

Delays per cause (EUROCONTROL Area)

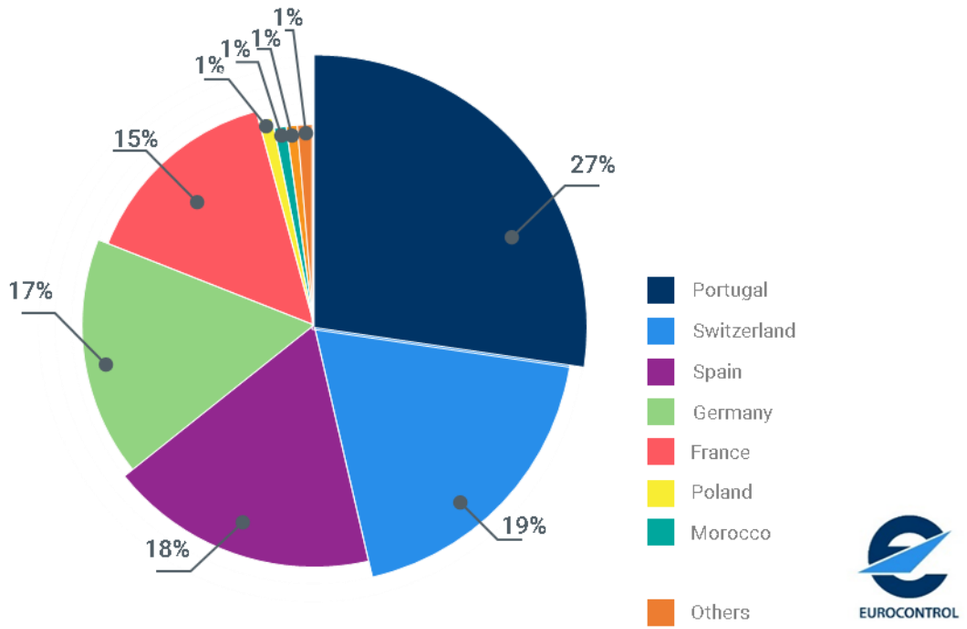
In minutes (total daily and 7-day average) in 2024



- Week 9 (26 February – 3 March) registered slightly lower levels of delay (-1%) compared to the previous week, whereas traffic demand was higher (+5%). Delay was 59% higher than in the equivalent week of 2023.
- February ended with en-route ATFM delay being 31% lower than in February 2023. This improvement on 2023 should be treated with care as February 2023 was disrupted for a couple of days by ATC Industrial Action in France. For the first two months of the year, delays are +4% higher vs the same period in 2023.
- Capacity/staffing issues were the main cause of delay in Week 9 (78%). ATC disruptions were the second main cause (14%), especially on 2 and 3 March owing to technical issues in Geneva and Zurich ACCs.
- Though there were industrial actions (Lufthansa, Brussels Airlines between Wednesday and Friday) and Austrian Airways (Friday), they did not have an impact on ATFM delays.

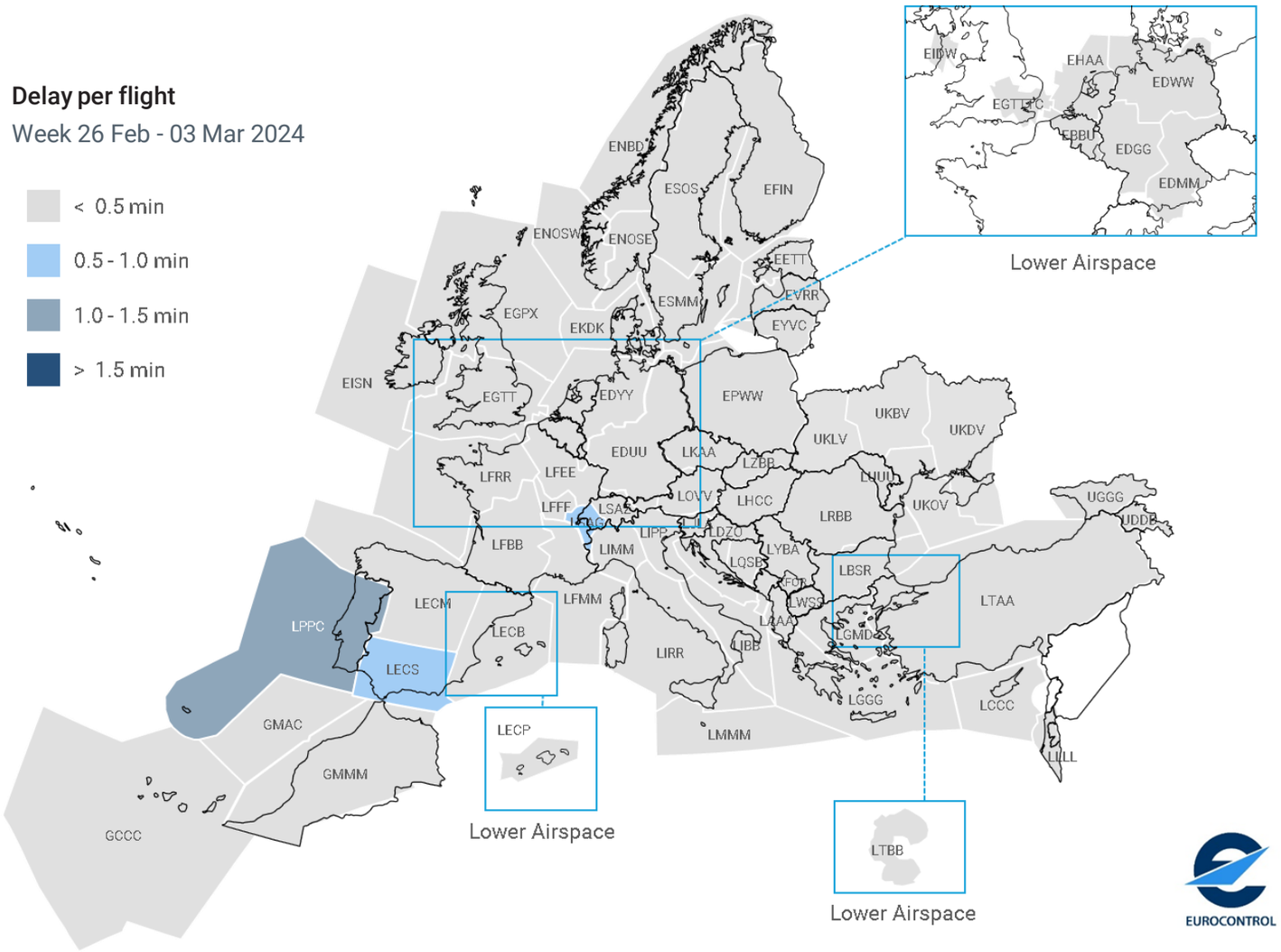
Share of en-route ATFM delays

Week 26 Feb - 03 Mar 2024



- Portugal accounted for 27% of all en-route ATFM delay due to capacity/staffing issues in Lisbon ACC. Traffic demand for Canaries remains strong with minimum-cost routes over the week-end via Lisbon ACC sectors.
- Switzerland recorded 19% of all en-route ATFM delays, explained by a decrease of sector capacities from the ANSP, owing to technical issues with ATM applications.
- Spain accounted for 18% of all ATFM delays, notably in Seville ACC.

En-route ATFM delayed flights per Area Control Centre



- Over the last week (Week 9), there was one ACC with delay higher than 1.0 min/flight.
- Lisbon ACC recorded 1.3 min/flight, owing to capacity and staffing issues.
- Geneva ACC recorded 0.6 min/flight and Zurich ACC recorded 0.3 min/flight owing to a 20% decrease in sector capacity in all the upper sectors (above FL245) over the week-end as the ANSP experienced several technical problems with applications.
- Seville ACC recorded 0.6 min/flight due to ATC capacity measures: the ACC needed specific regulation measures as was recording high levels of demand.

Top 10 States

Departures and arrivals

Week 26 Feb - 03 Mar 2024

See more

No.	Country	Average daily flights	% prev week	% prev year	% 2019
1.	United Kingdom	4,760	+1%	+5%	-10%
2.	Spain	4,100	+3%	+8%	+5%
3.	Germany	4,093	+7%	+6%	-22%
4.	France	3,559	+1%	+0%	-7%
5.	Italy	2,938	+2%	+9%	-3%
6.	Türkiye	2,441	+0%	+4%	+12%
7.	Netherlands	1,504	+0%	+10%	-4%
8.	Switzerland	1,249	-1%	+3%	-8%
9.	Norway	1,212	+2%	+0%	-11%
10.	Poland	1,018	+4%	+14%	+3%

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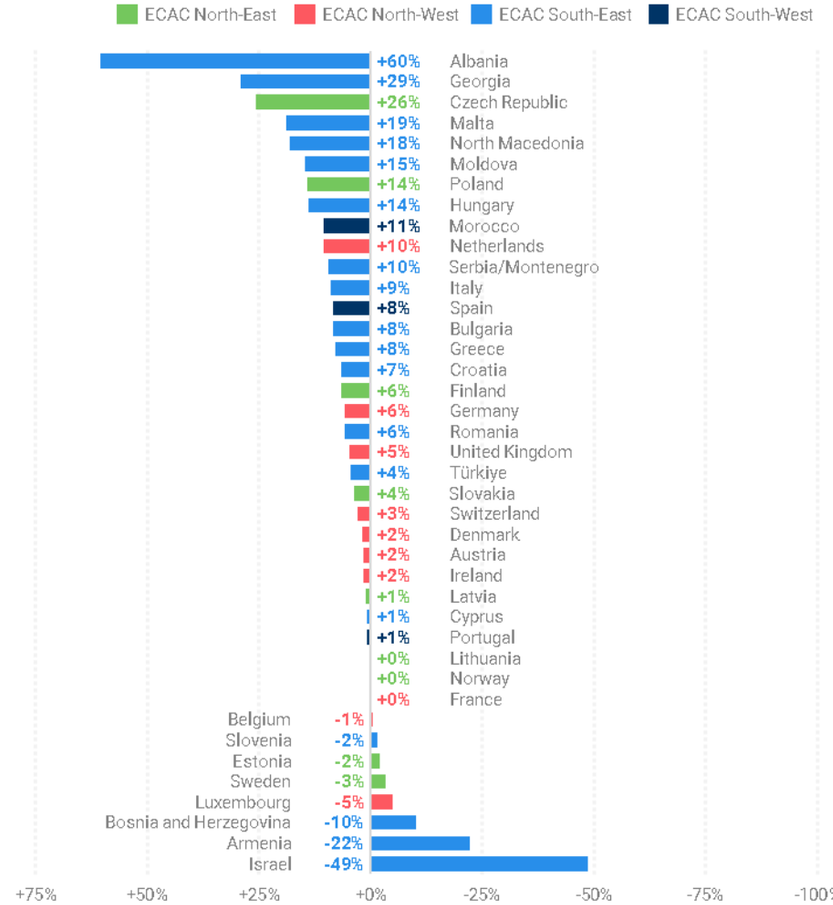
- The top 10 States, in aggregate, recorded slightly more flights compared to the previous week (+2.2%).
- Compared to the previous edition: Poland entered the top 10 while Portugal exited.
- All States but one recorded more or comparable number of flights compared to the previous week, mainly as a result of increased capacities from the airlines (winter holidays in some parts of Europe). Germany posted the highest increase (+7%), artificially inflated due to the strikes at German airports during week 8. Poland recorded a +4%.growth owing to increase in domestic traffic and flows from/to Germany. Switzerland recorded less departing/arriving flights (-1%) due to a decline in domestic and in flows with Austria and the Netherlands.
- Three States within the top 10 are recording traffic above 2019 (Spain, Türkiye, and Poland). The seven remaining States are still between 22% and 3% below pre-COVID levels.
- The number of flights to/from Israel recorded 49% fewer flights compared to the same week in 2022.

States in the EUROCONTROL Network

Compared to the equivalent week in 2019

Dep/Arr flights for week 26 Feb - 03 Mar 2024



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*Based on integrated ANSP

Top 10 aircraft operators

Week 26 Feb - 03 Mar 2024 (avg daily flights)

See more

No.	Aircraft operator	Average daily flights	% prev week	% prev year	% 2019
1.	Ryanair Group	2,280	+2%	+4%	+19%
2.	easyJet Group	1,362	-1%	+6%	-12%
3.	Turkish Airlines	1,328	+1%	+0%	+5%
4.	Lufthansa Airlines	1,111	+16%	+7%	-27%
5.	Air France Group	898	-1%	-7%	-22%
6.	British Airways Group	821	+1%	+4%	-7%
7.	KLM Group	815	+0%	+17%	+3%
8.	Wizz Air Group	726	+1%	+13%	+53%
9.	SAS Group	562	+1%	-3%	-31%
10.	Vueling	539	+4%	+3%	+10%

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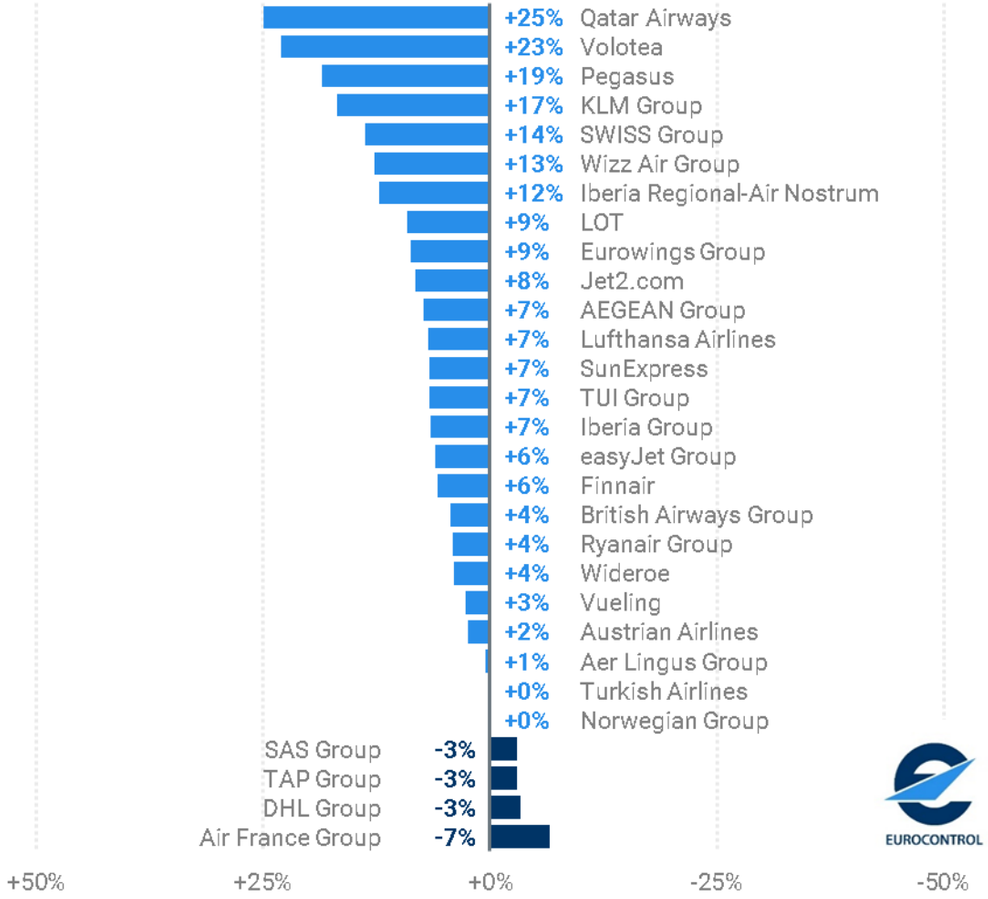
- The top 10 aircraft operators posted an increase in the number of flights (+2.2%) compared to the previous week, owing to a slight increase in capacities (winter holidays in main States).
- Biggest increases were for Lufthansa (+16% on previous week), artificially inflated by the industrial action by ground staff at some German airports the week before and Vueling (+4%) on domestic flows in Spain and flows UK ↔ Spain or Italy ↔ Spain.
- Last week, five airlines within the top 10 had flight numbers above 2019 levels: +53% (Wizz Air Group), +19% (Ryanair Group), +10% (Vueling), +5% (Turkish Airlines) and +3% (KLM Group).

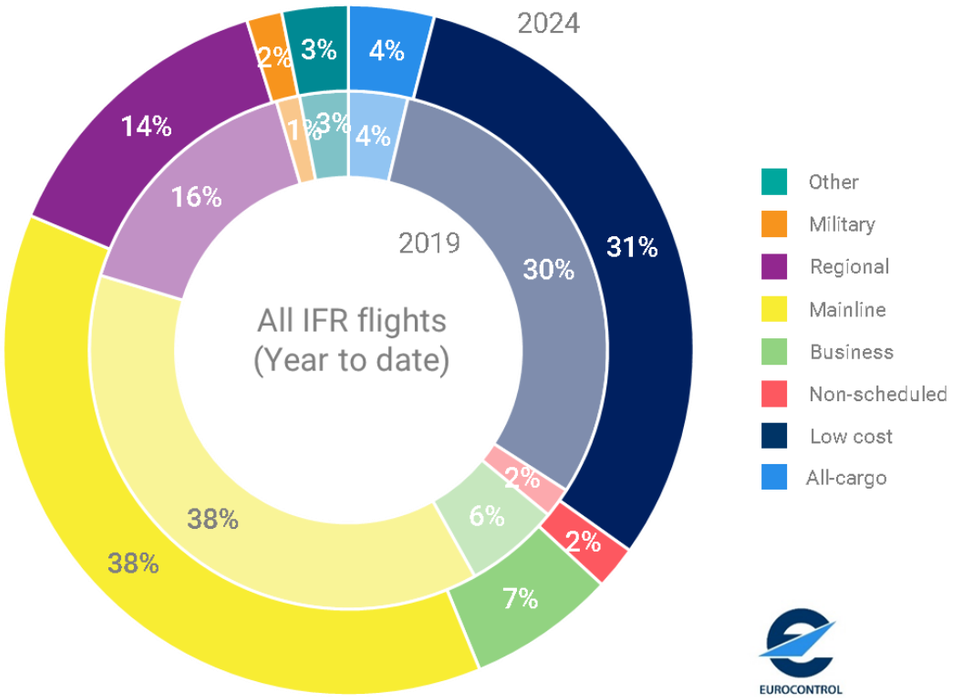
Aircraft operators in the EUROCONTROL Network

Compared to the equivalent week in 2019
Dep/Arr flights for week 26 Feb - 03 Mar 2024



Market segments in the EUROCONTROL Network

Average share of total flights (year to date)

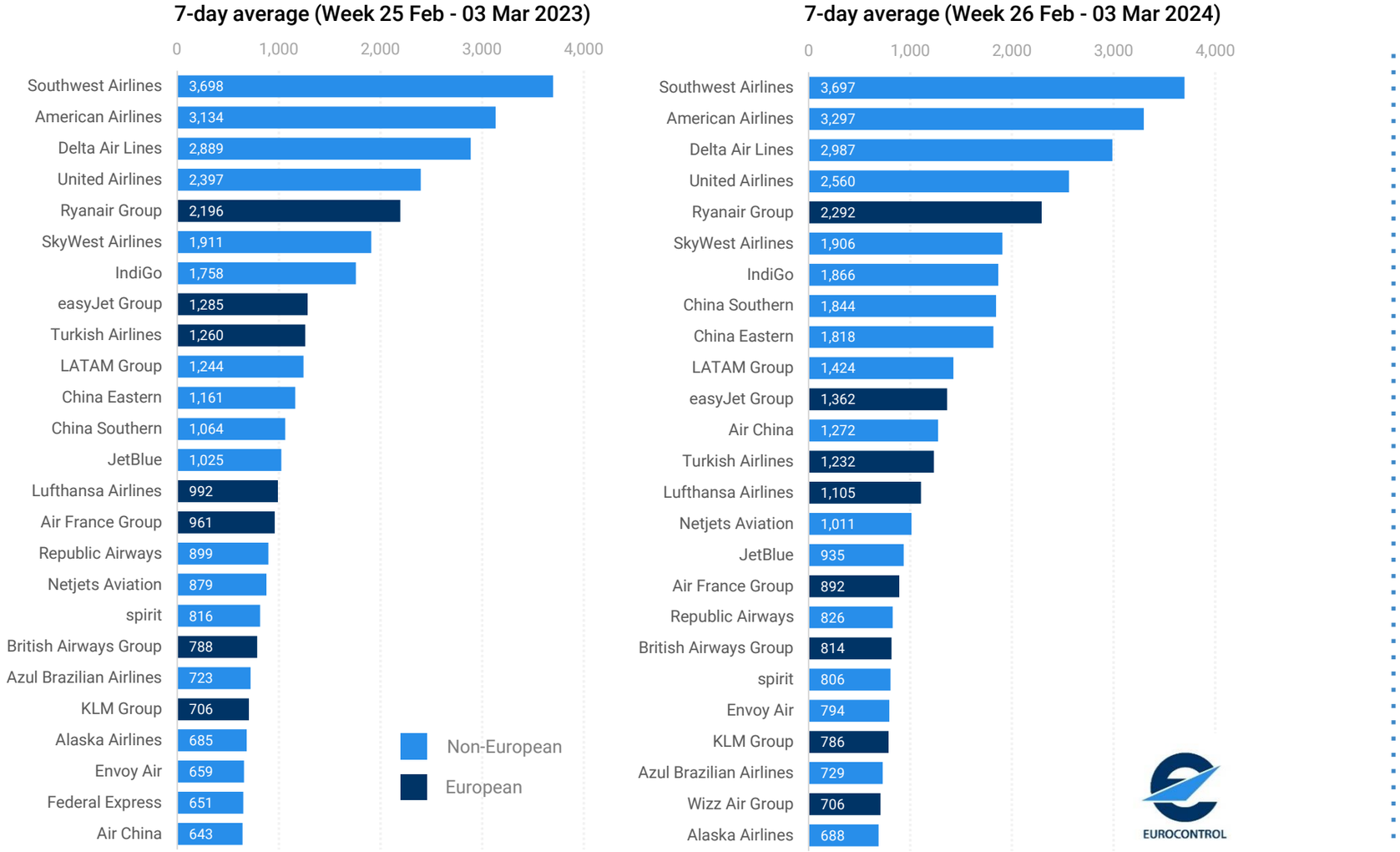


No.	Market segment	Avg. flights	% prev week	% prev year	% 2019
1.	Mainline	9,246	+3%	+9%	-7%
2.	Low Cost	7,695	+1%	+8%	+1%
3.	Regional	3,416	+2%	+1%	-14%
4.	Business	1,744	-1%	+1%	+15%
5.	All-cargo	965	+2%	-11%	+13%
6.	Other	820	+5%	-11%	+35%
7.	Non-Scheduled	518	+2%	+6%	-9%
8.	Military	459	+11%	-4%	-1%

- Most of the market segments (Mainline, Non-Scheduled, All-Cargo) recorded the same market shares in 2024 (year-to-date) as in 2019 (comparable period). The Regional market share slightly reduced (-2pp) while the Low Cost and the Business Aviation market shares increased by 1pp.
- Compared to 2023, passenger markets recorded growth in the number of flights operated: Mainline (+9%), Low Cost (+8%), Regional (+1%), Business Aviation (+1%) and Non-Scheduled (+6%).
- On the other hand, All-Cargo (-11%) is posting a decrease compared to 2023 levels (fewer flights on domestic flows in Türkiye).
- Four market segments are recording flights above 2019 levels: Business (+15%), All-Cargo (+13%), Low-Cost (+1%) and Other (flights not falling in the default categories).

Top 25 global aircraft operators

(average daily departure flights)

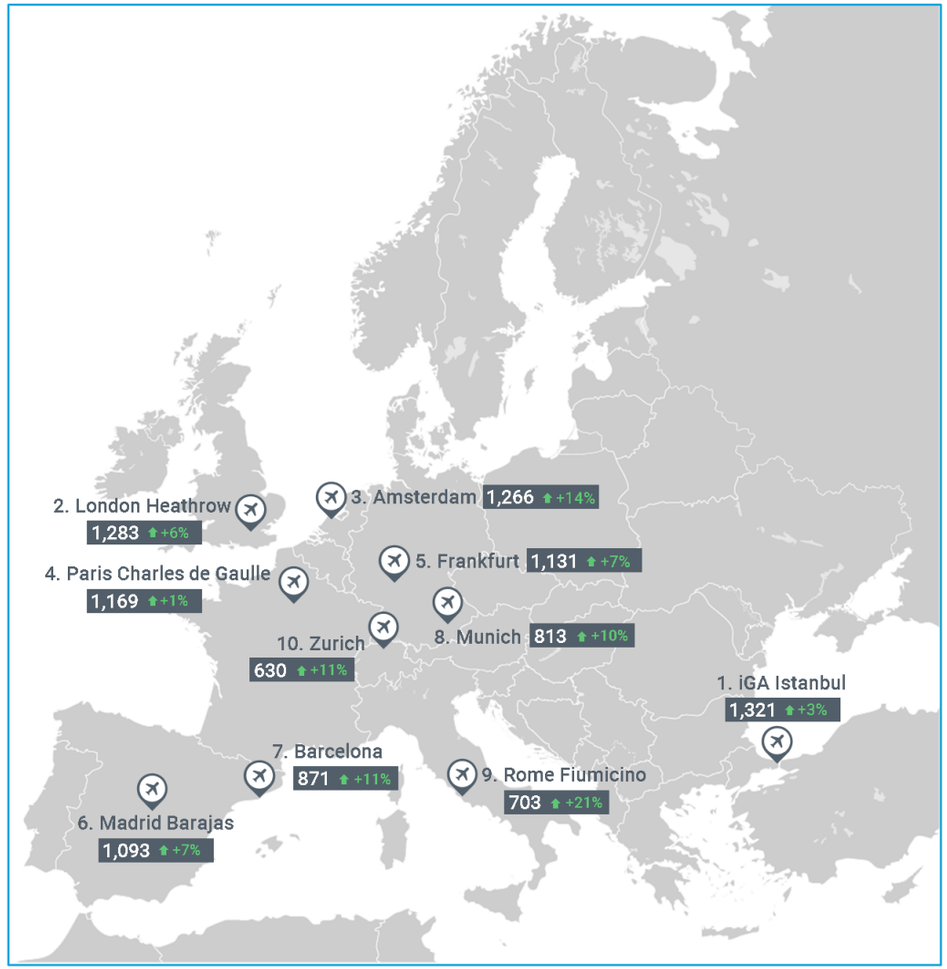


Source: Flightradar24 Historical Global Utilisation data

Over the last week:

- Eight European airlines are ranked in the top 25 global aircraft operators (7 airlines in 2023).
- The first European aircraft operator is Ryanair (ranked 5th) – the same rank as a year ago.
- Seven more airlines make the top 25: easyJet (11th), Turkish Airlines (13th), Lufthansa (14th), Air France (17th), British Airways (19th), KLM (22nd) and Wizz Air (24th).

Top 10 airports



Airport ranking

Week 26 Feb - 03 Mar 2024

See more

No.	Airport	Avg. daily dep/arr flights	% prev week	% prev year	% 2019
1.	iGA Istanbul	1,321	+1%	+3%	n/a
2.	London Heathrow	1,283	+1%	+6%	+1%
3.	Amsterdam	1,266	-1%	+14%	-5%
4.	Paris Charles de Gaulle	1,169	-0%	+1%	-9%
5.	Frankfurt	1,131	+13%	+7%	-16%
6.	Madrid Barajas	1,093	+1%	+7%	-2%
7.	Barcelona	871	+5%	+11%	+1%
8.	Munich	813	+9%	+10%	-26%
9.	Rome Fiumicino	703	+2%	+21%	-10%
10.	Zurich	630	+2%	+11%	-9%

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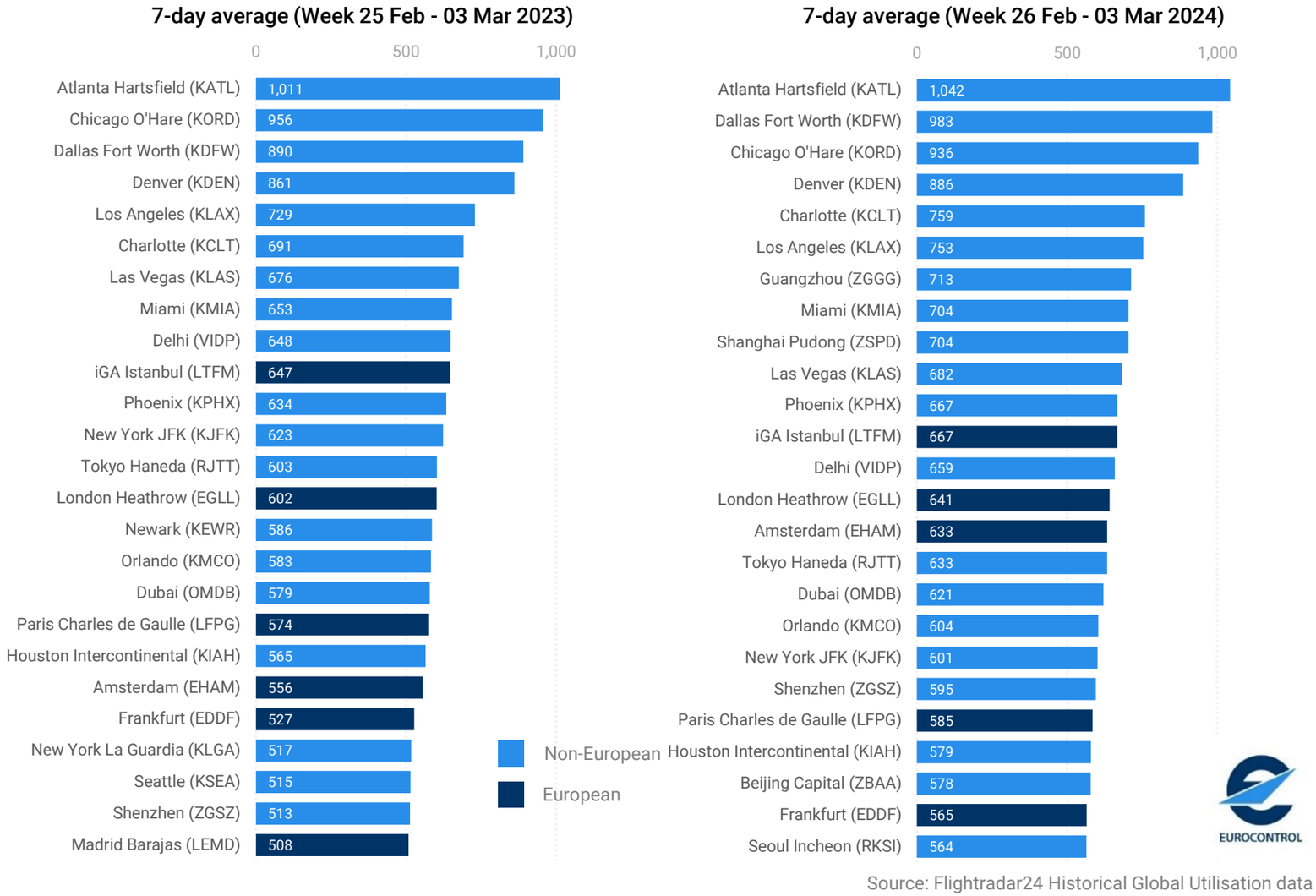
- Some changes in the ranking compared to the previous edition: Munich and Barcelona swapped places. London Gatwick has dropped out of the top 10, replaced by Zurich.
- iGA Istanbul (1,321 fl/day, +1% on previous week), the busiest airport, is chased by London Heathrow (1,283, +1%) and Amsterdam Schiphol (1,266, -1%).
- All but two airports recorded growth vs the previous week.
- As explained previously, German airport recorded double digit growth as week 8 was affected by industrial action.
- All airports experienced growth vs 2023, ranging from +1% (Paris CDG) to +21% (Rome).
- Only two of the top 10 airports (London Heathrow and Barcelona) are currently handling traffic above their 2019 levels.

Top 25 global airport departures

(average daily departure flights)



Source: Flightradar24 Historical Global Utilisation data

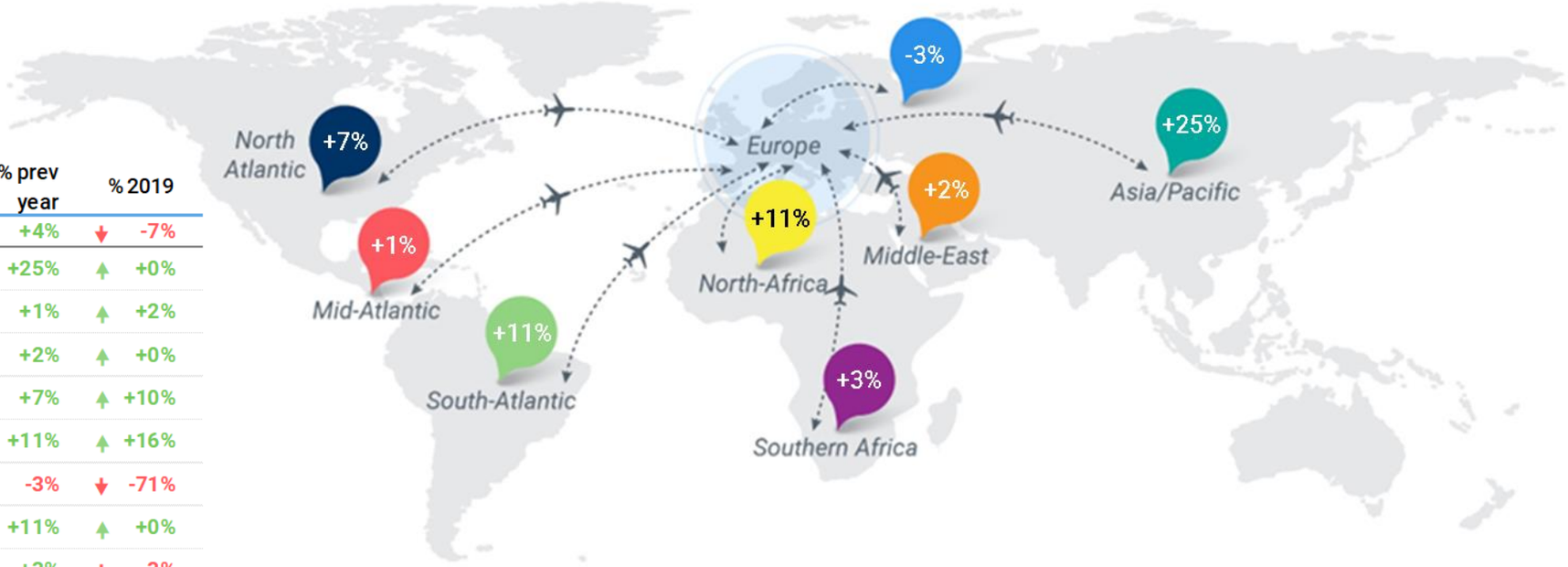
Over the last week

- Five European airports are ranked in the top 25 of global airport departures (in the equivalent week of 2023, there were six, but Madrid is ranked 27 this year).
- The highest ranked European airport (12th) is iGA Istanbul Airport, slightly lower than in 2023 (10th).
- The other European airports in the top 25 are London Heathrow (14th), Amsterdam (15th), Paris CDG (21st), and Frankfurt (24th).
- Last year, Shenzhen was the only Chinese airport (24th) in the top 25, whereas this year, there are four of them in the top 25: Guangzhou (7th), Shanghai (9th), Shenzhen (20th) and Beijing (23rd).

Traffic flows

(average daily departure/arrival flights for week 26 Feb - 03 Mar 2024)

Region	Average daily flights	% prev week	% prev year	% 2019
Intra-Europe	**19,020**	**+2%**	**+4%**	**-7%**
Europe ↔ Asia/Pacific	768	+3%	+25%	+0%
Europe ↔ Mid-Atlantic	199	-2%	+1%	+2%
Europe ↔ Middle-East	1,290	+3%	+2%	+0%
Europe ↔ North Atlantic	1,037	+4%	+7%	+10%
Europe ↔ North-Africa	1,089	+1%	+11%	+16%
Europe ↔ Other Europe	226	-1%	-3%	-71%
Europe ↔ South-Atlantic	179	-0%	+11%	+0%
Europe ↔ Southern Africa	318	+1%	+3%	-3%
Non Intra-Europe	**5,105**	**+2%**	**+8%**	**-5%**



- The main traffic flow was intra-European with 19,020 daily flights last week, recording more flights (+2%) when compared to the previous week. Intercontinental flows resulted in 5,105 daily flights on average last week, +2% vs prev. week.
- The second-largest regional flow is between Europe and Middle-East: 1,290 average daily flights last week, a +3% increase compared to the previous week, with busiest partner being UAE,
- The third flow is to/from North-Africa, with 1,089 flights per day, increasing +1% on the previous week.
- The fourth flow is to/from North-Atlantic, with 1,037 daily flights, 4% more than in the previous week.
- Flows with Other Europe (including the Russian Federation) remain massively reduced at -71% compared to 2019.
- Flows between Europe and Asia/Pacific have now recovered to their 2019 levels.

Top 10 long-haul country pairs

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

Week 26 Feb - 03 Mar 2024

No.	Country pair	Average daily flights	% prev week	% prev year	% 2019
1.	UK ↔ US	260	+4%	-1%	-4%
2.	Germany ↔ US	133	+7%	-7%	-8%
3.	France ↔ US	98	+3%	+2%	+11%
4.	Netherlands ↔ US	70	+1%	+16%	+15%
5.	UAE ↔ UK	62	-1%	+12%	-1%
6.	Spain ↔ US	57	+20%	+12%	+20%
7.	Ireland ↔ US	45	+17%	+0%	+12%
8.	Russia ↔ UAE	44	+0%	+1%	+1706%
9.	India ↔ UK	44	+0%	+4%	+12%
10.	Germany ↔ UAE	42	+2%	+12%	-6%

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- Six of the top 10 long-haul country pairs are with the United States, the main three being between the US and the UK, Germany and France. Three flows within the top 10 are pairs between Europe and the United Arab Emirates. The last one is between UK and India.
- All flows but one posted an increase (or were stable) vs the previous week (ranging from +0% to +20%).
- Six flows are currently at or above 2019 levels (France ↔ US, Netherlands ↔ US, Spain ↔ US, Ireland ↔ US, India ↔ UK and Russia ↔ UAE; this last flow is largely inflated by the Ukraine-Russia war, with the UAE acting as a hubbing alternative to Europe)

Economics

Week 26 Feb - 03 Mar 2024

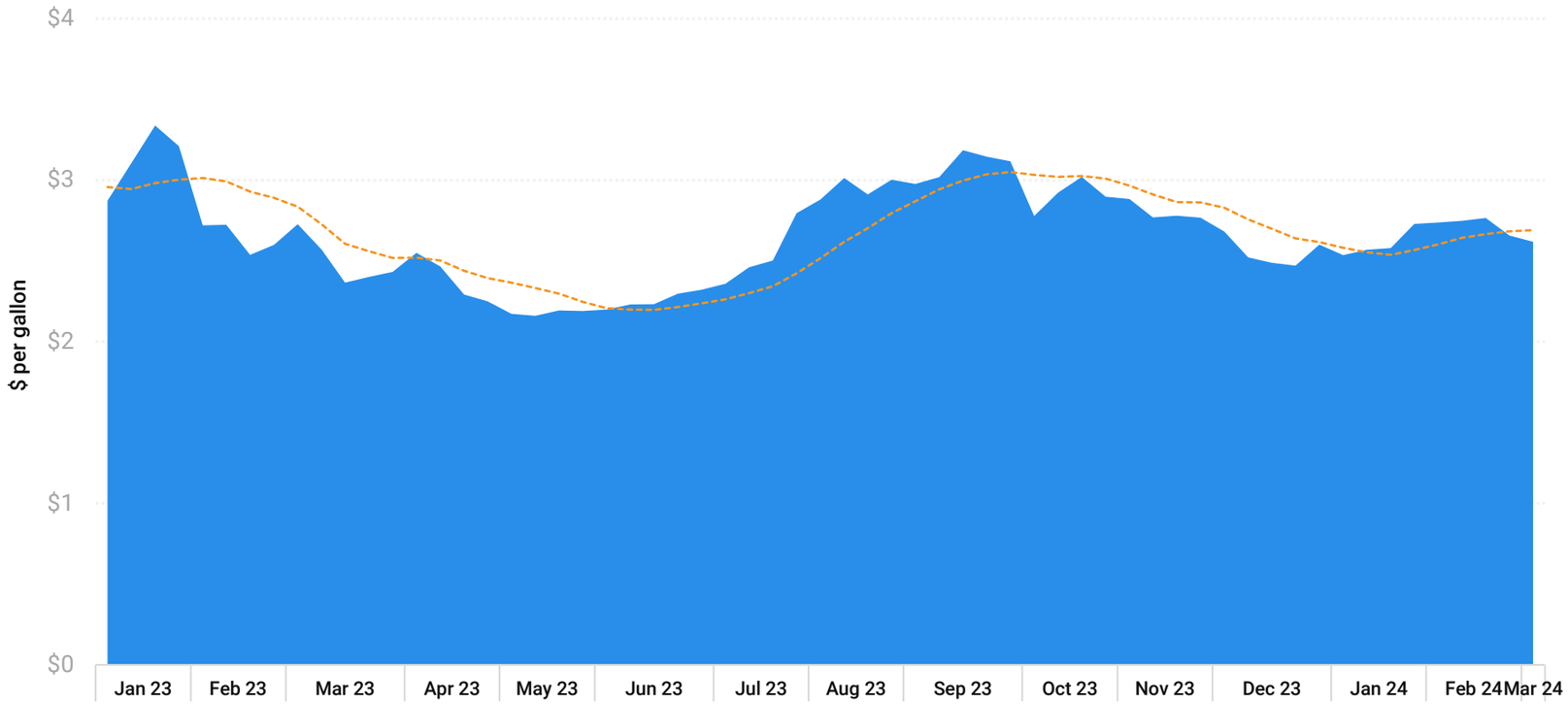
01 Mar 2024
avg fuel price:

$2.62 /gallon

-5%
vs. $2.77 /gallon
on 16 Feb 2024

Source: IATA/Platts

Jet fuel price (Europe)



Source: IATA/Platts

- The average price of jet fuel was at 2.62 USD/gallon on 1 March 2024, lower (-5%) than two weeks ago.
- Based on a moving average trend, fuel prices in Europe have risen since the beginning of 2024, following a decline in Q4 2023.
- In December 2023 OPEC+ members (13 OPEC + 11 non-OPEC) including Saudi Arabia extended their voluntary oil output reductions until the end of Q1 2024 amid concerns over future fuel demand.

Supporting European Aviation

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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