

SUPPORTING
EUROPEAN
AVIATION



EUROCONTROL

EUROPEAN AVIATION OVERVIEW

29 Jul - 04 Aug 2024

AVIATION
INTELLIGENCE+



Thursday 08 August 2024

Headlines

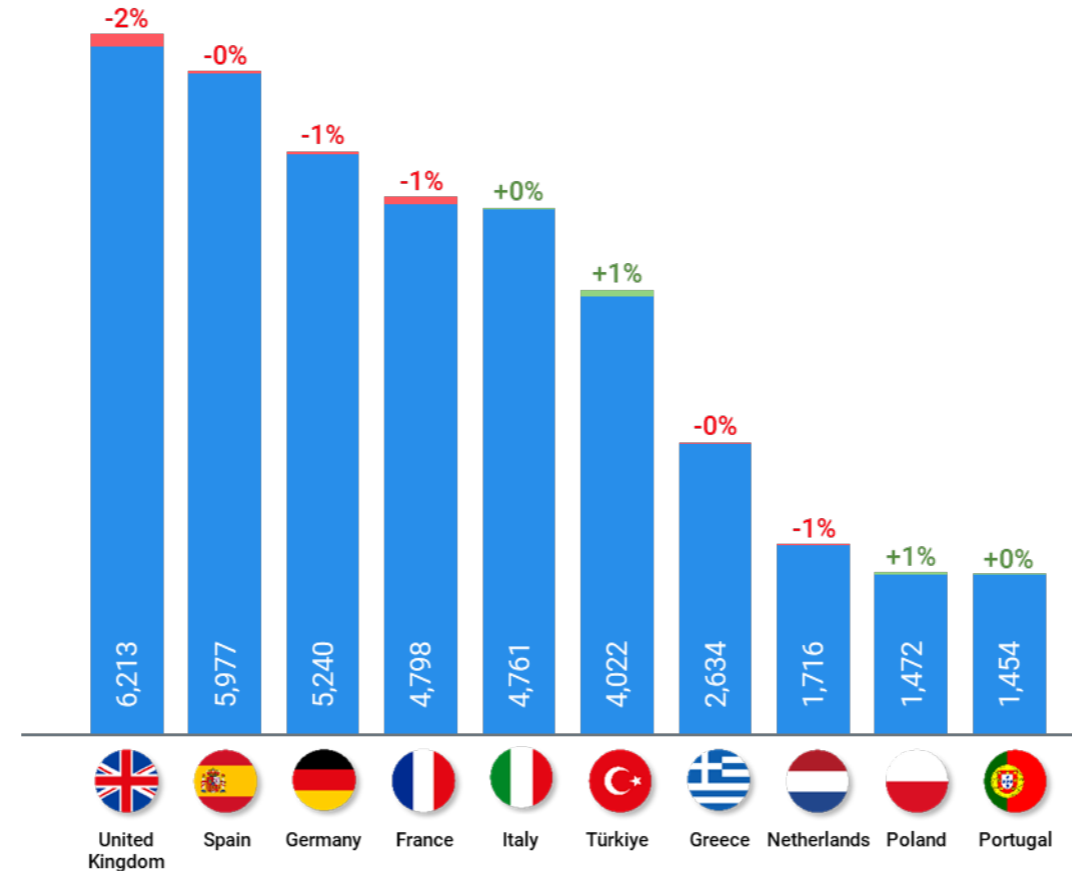
(Week 29 Jul - 04 Aug 2024)

- The network recorded 34,203 average daily flights (+5% vs 2023). This was just below (-0.5%) the previous week's average.
- At country level, the top 10 States together recorded a slight decrease (-0.4%) in the number of flights compared to the previous week.
- On average, the top 10 carriers all together deployed slightly higher capacities (+0.6%) compared to last week.
- En-route ATFM delays averaged 184,200 minutes per day (5.4 min/flight), -7% compared to the previous week. Overall, weather was the main cause for en-route delays (47%), with Thursday 1 August most affected, followed by capacity/staffing (46%).
- The average jet fuel price in Europe reached 2.35 USD/gallon on 2 August 2024 (-5% compared to two weeks ago).

Top 10 busiest States

On week 29 Jul - 04 Aug 2024

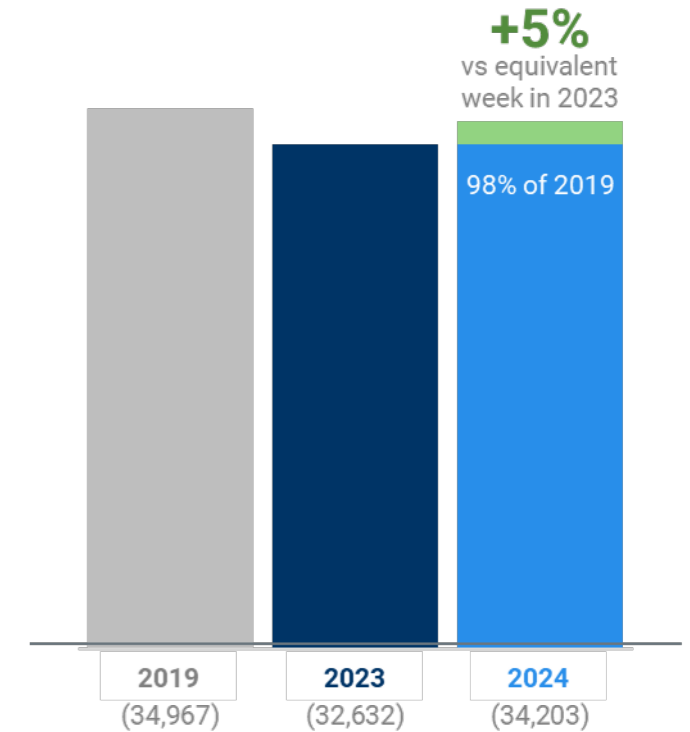
(all flights excl. overflights compared with previous week)



Traffic situation

Average daily flights (including overflights)

Week 29 Jul - 04 Aug 2024



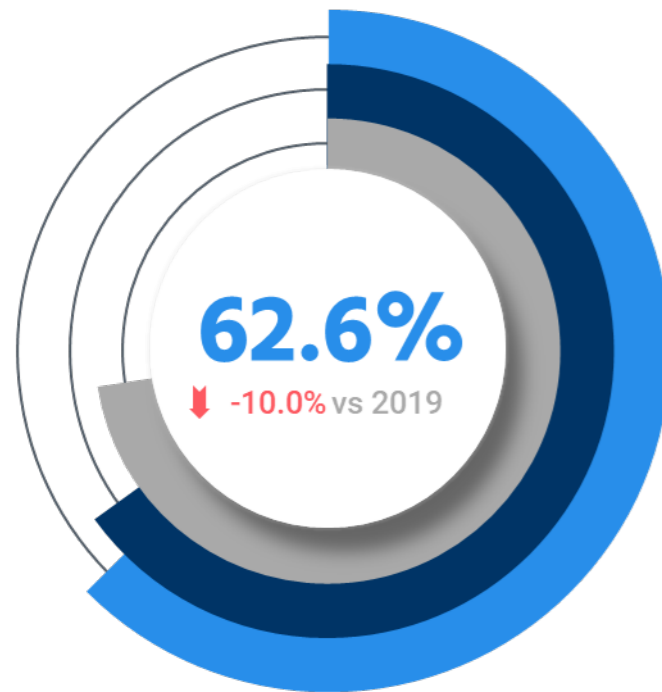
Arrival & departure punctuality

(all network scheduled flights)

Week 29 Jul - 04 Aug

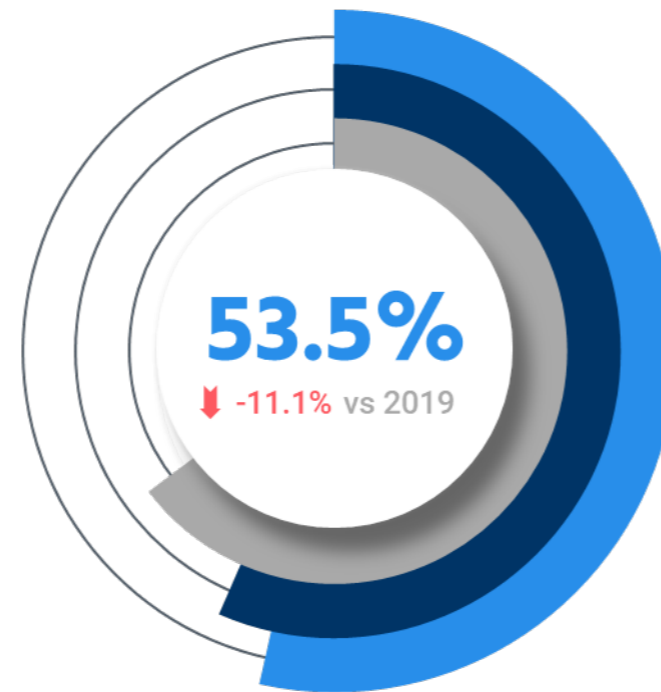
2024

ARRIVAL PUNCTUALITY



72.5% _____ in 2019
65.0% _____ in 2023

DEPARTURE PUNCTUALITY



64.7% _____ in 2019
56.5% _____ in 2023

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

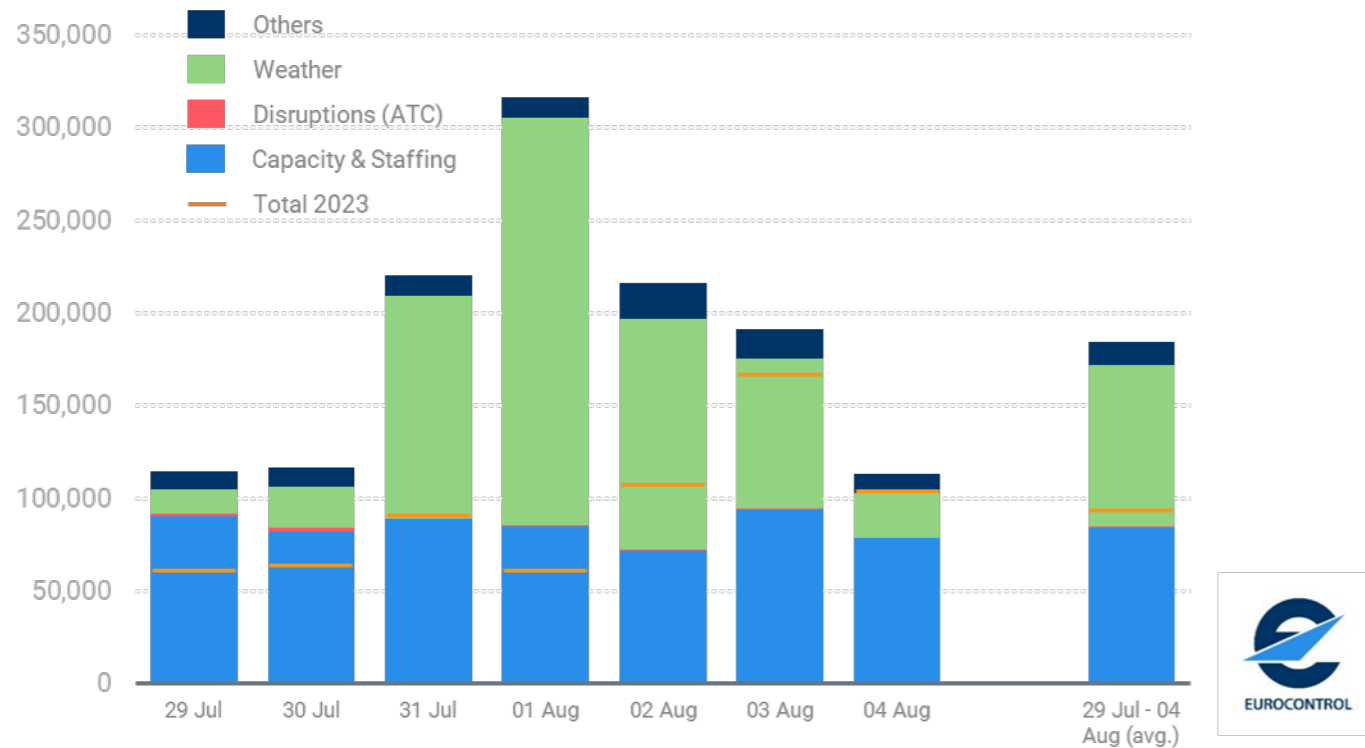


- ✈ Network punctuality deteriorated when compared to the equivalent week in 2023. Arrival punctuality fell by 2.4 percentage points to 62.6%, with departure punctuality falling by 3.0 percentage points to 53.5%. Compared to the same week in 2019, it was much worse – with a drop of around 10 percentage points.
- ✈ Significant ATFM En-Route delays were recorded during the week, almost half of the total ATFM En-Route delay was due to weather reasons (seasonal weather such as thunderstorm activity). The remainder of the delays were mostly attributed to ATC Capacity and ATC Staffing.
- ✈ Athens airport continues to suffer from daily ATC capacity regulations. Antalya airport (aerodrome capacity) and Lisbon (aerodrome capacity and weather) also saw a daily impact from arrival regulations. At the beginning of the week, Tenerife-North airport saw long delays and many aircraft were diverted due to low visibility. At the end of the week, Turin airport was impacted by a thunderstorm. The weekend saw a strong impact on Frankfurt airport due to hailstorm causing multiple flight diversions. An eruption of Mount Etna, on Sunday early morning, caused long delays, multiple flight diversions and a high number of flight cancellations at Catania airport until early afternoon.

En-route ATFM delays

Delays per cause (EUROCONTROL Area)

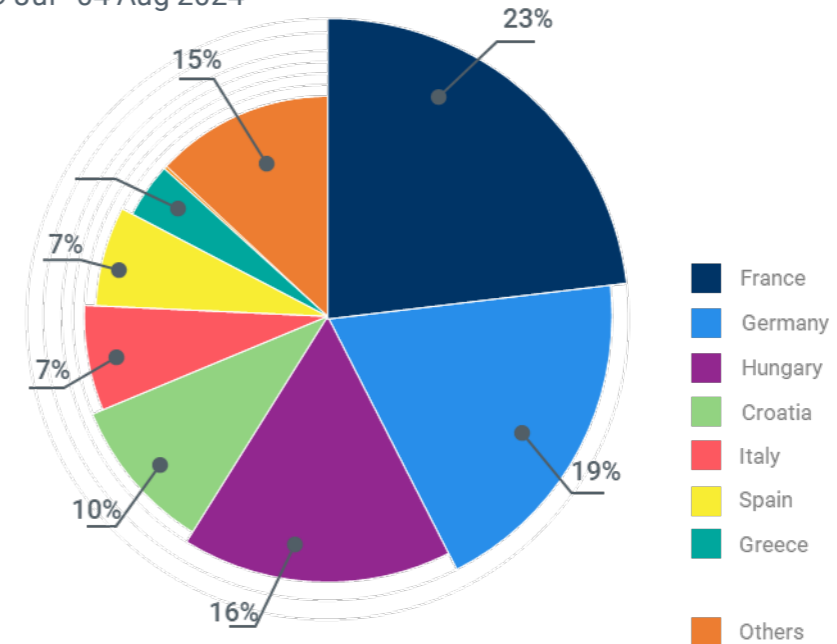
In minutes (total daily and 7-day average) in 2024



- ➔ Week 31 (29 Jul-04 Aug) registered fewer en-route delays (-7%) compared to the previous week with an average of 184,200 minutes, equivalent to 5.4 min/flight. En-route ATFM delays were 96% higher than in the equivalent operational week of 2023.
- ➔ Weather was the main cause (47%), notably owing to Karlsruhe, Reims and Zagreb centres, which generated the most delays. Thursday 1st of August was particularly affected by weather issues across North-West Europe.
- ➔ Capacity/staffing accounted for 46% of en-route delays (Budapest, Marseille and Karlsruhe centres).

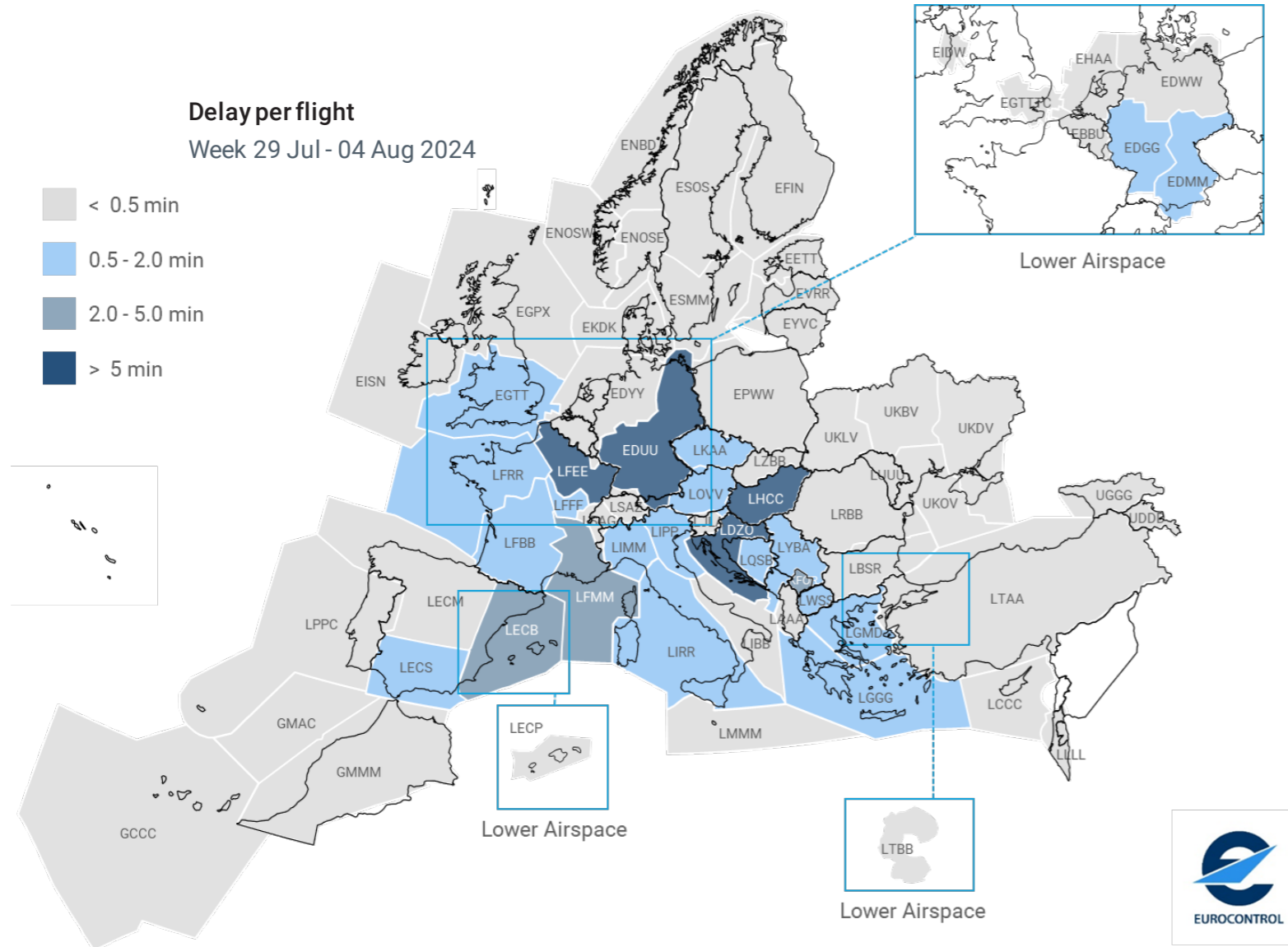
Share of en-route ATFM delays

Week 29 Jul - 04 Aug 2024



- ➔ France accounted for 23% of all en-route ATFM delays mainly at Reims ACC (9.2 pp) due to weather and capacity, notably on Wednesday and Thursday; and at Marseille ACC (7.6 pp) due to staffing (5 pp) and weather 1.3 pp.
- ➔ Germany accounted for 19% mainly at Karlsruhe UAC (16.2 pp) due to weather (10.5 pp) and capacity (5.5 pp).
- ➔ Hungary accounted for 16% with ongoing capacity/staffing issues (13.9 pp) at Budapest ACC. Traffic was 23% above 2019 with onload from L'viv FIR and the Moscow – Türkiye flow.
- ➔ Croatia accounted for 10% owing to weather (5.9 pp) and capacity (3.3 pp).

En-route ATFM delayed flights per Area Control Centre



- ✈ Over Week 31, fifteen ACCs recorded en-route ATFM delays higher than 1.0 min/flight.
- ✈ Budapest ACC recorded 8.2 min/flight mainly due to daily protective capacity measures with significant on-load from flights avoiding L'viv FIR. Traffic demand for week #31 was +23% above 2019. Convective weather (0.9) was disruptive, most notably on Friday.
- ✈ Zagreb ACC recorded 5.3 min/flight. The traffic for the week was 23% above 2019 and 7% above 2023. Moreover,, convective weather (3.1) complicated traffic management and limited sector capacities from Thursday.
- ✈ Karlsruhe UAC recorded 5.1 min/flight with convective weather (3.3) notably from Wednesday to Saturday. Delay mostly accumulating in South sector group but not excessively due to the S24 mitigation plan.
- ✈ Reims ACC recorded 5.0 min/flight due to weather (4.0); particularly disruptive Wednesday, Thursday and Friday. Traffic demand was 0.5% above 2019 level.
- ✈ Marseille ACC recorded 3.3 min/flight, in part as a result of convective weather (0.6) on Tuesday; ATC Staffing (2.1) limited sector availability, most notably in the Eastern sector group, daily.

Top 10 States

Departures and arrivals

Week 29 Jul - 04 Aug 2024

[See more](#)

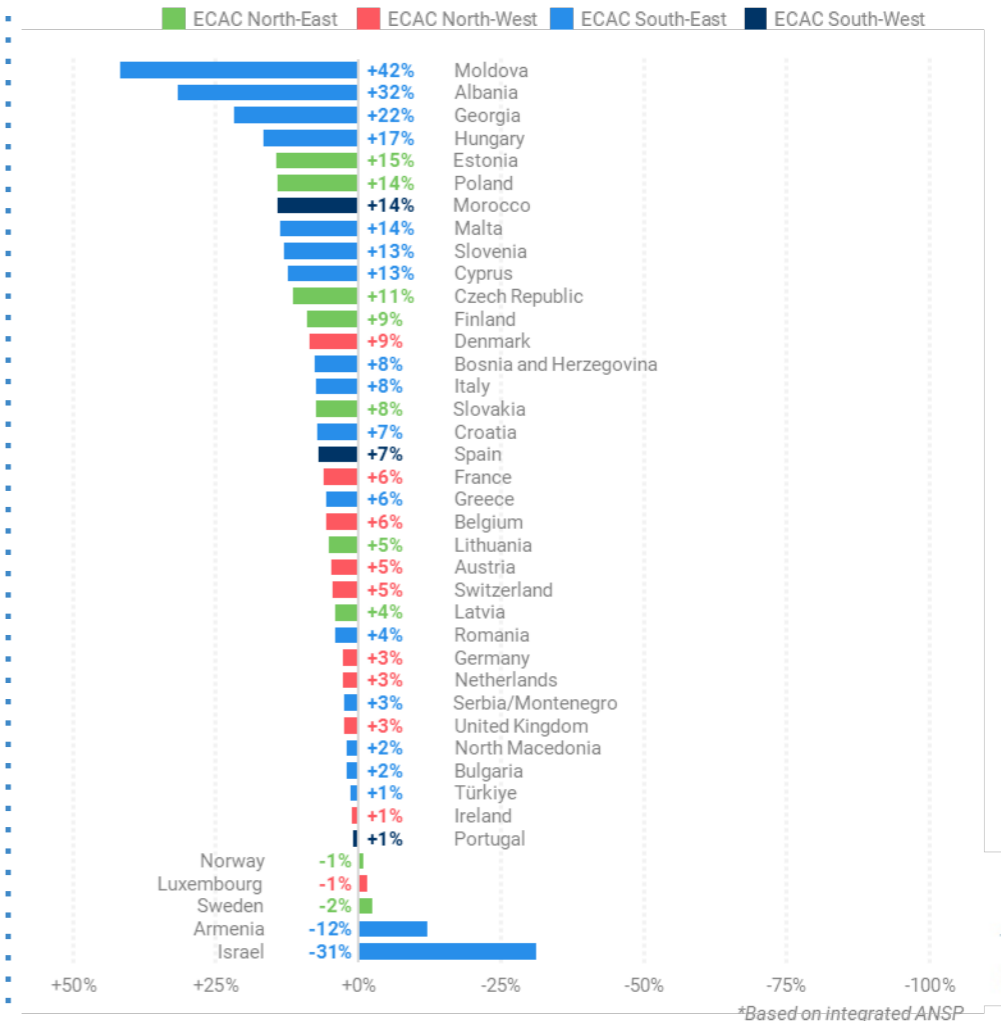
| No. | Country | Average daily flights | % prev week | % prev year | % 2019 |
|-----|----------------|-----------------------|-------------|-------------|--------|
| 1. | United Kingdom | 6,213 | -2% | ↑ +3% | ↓ -6% |
| 2. | Spain | 5,977 | -0% | ↑ +7% | ↑ +6% |
| 3. | Germany | 5,240 | -1% | ↑ +3% | ↓ -13% |
| 4. | France | 4,798 | -1% | ↑ +6% | ↓ -1% |
| 5. | Italy | 4,761 | +0% | ↑ +8% | ↑ +7% |
| 6. | Türkiye | 4,022 | +1% | ↑ +1% | ↑ +11% |
| 7. | Greece | 2,634 | -0% | ↑ +6% | ↑ +15% |
| 8. | Netherlands | 1,716 | -1% | ↑ +3% | ↓ -4% |
| 9. | Poland | 1,472 | +1% | ↑ +14% | ↑ +15% |
| 10. | Portugal | 1,454 | +0% | ↑ +1% | ↑ +8% |



States in the EUROCONTROL Network

Compared to the equivalent week in 2023

Dep/Arr flights for week 29 Jul - 04 Aug 2024



*Based on integrated ANSP

- ✈ The top 10 States, in aggregate, recorded 0.4% fewer flights than in the previous week.
- ✈ Compared to the previous edition, Poland and Portugal swapped places.
- ✈ Most of the States recorded fewer number of flights vs the previous week.
- ✈ UK recorded the biggest decrease (-2%) owing to fewer flights from small operators and British Airways on domestic UK flows and flows France ↔ UK.
- ✈ Six States in the top 10 are recording traffic at or above 2019 levels (Poland, Greece, Türkiye, Portugal, Italy and Spain), with the remainder between 1% and 13% below pre-COVID levels.
- ✈ At network level, the lowest number of flights compared to the same week in 2023 was to/from Israel (-31%).

Top 10 aircraft operators

Week 29 Jul - 04 Aug 2024 (avg daily flights)

[See more](#)

| No. | Aircraft operator | Average daily flights | % prev week | % prev year | % 2019 |
|-----|------------------------|-----------------------|-------------|-------------|--------|
| 1. | Ryanair Group | 3,613 | +0% | ↑ +7% | ↑ +37% |
| 2. | easyJet Group | 1,836 | +1% | ↑ +3% | ↓ -3% |
| 3. | Turkish Airlines Group | 1,579 | +2% | ↓ -4% | ↑ +7% |
| 4. | Lufthansa Airlines | 1,225 | +1% | ↓ -2% | ↓ -20% |
| 5. | Air France Group | 1,136 | +3% | ↑ +6% | ↓ -5% |
| 6. | Wizz Air Group | 928 | +2% | ↓ -1% | ↑ +38% |
| 7. | KLM Group | 925 | -0% | ↑ +3% | ↓ -1% |
| 8. | British Airways Group | 848 | -4% | ↑ +0% | ↓ -13% |
| 9. | Vueling | 707 | -0% | ↑ +1% | ↓ -5% |
| 10. | SAS Group | 634 | +0% | ↓ -1% | ↓ -19% |

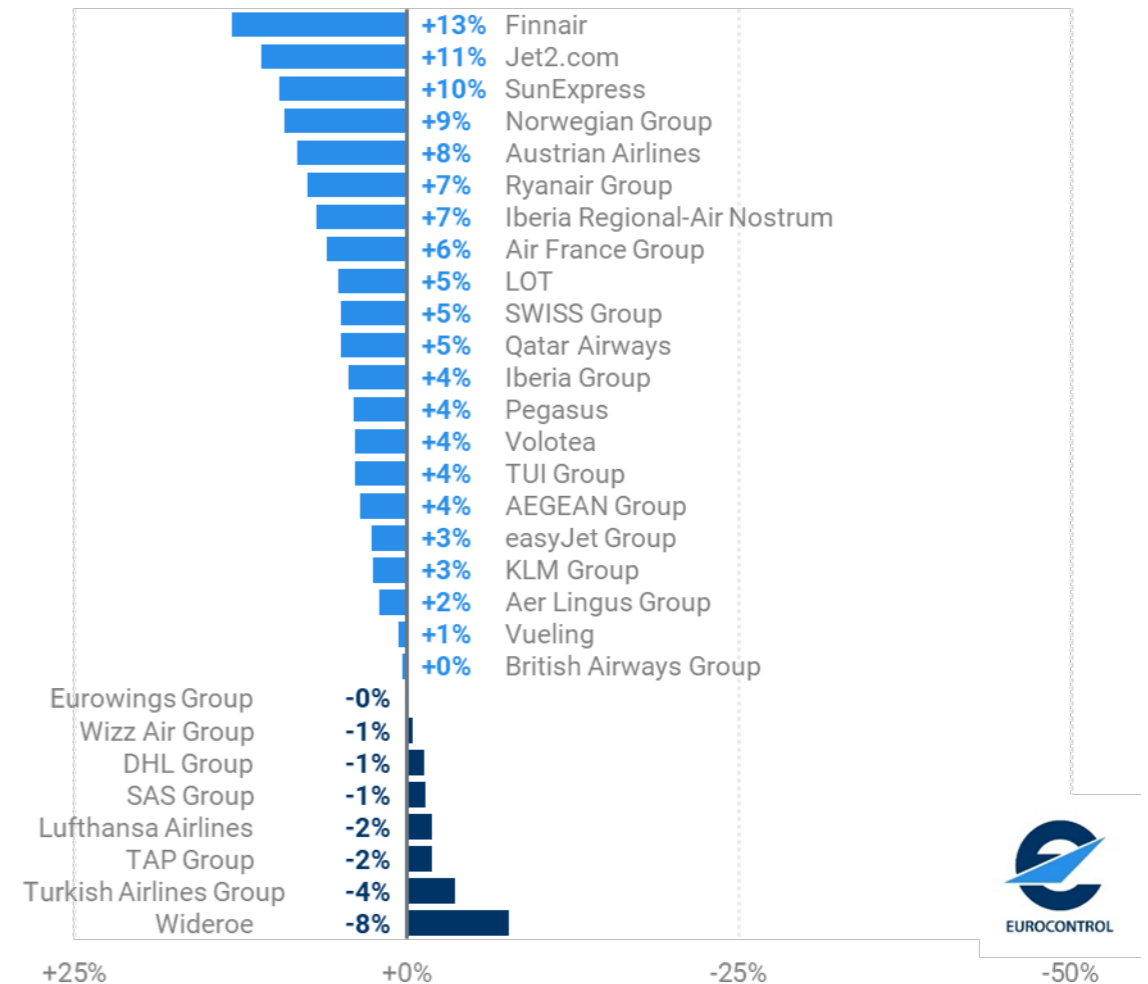


- The top 10 aircraft operators, in aggregate, posted a slight increase (0.6%) in number of flights compared to the previous week.
- Over week 31, the largest increase was for Air France (+3% vs week 30), mainly on France ↔ Italy, France ↔ Spain, France ↔ Germany. This moderate increase also includes a rebound effect from the partial closure of the Parisian airspace owing to the Olympics opening ceremony.
- British Airways recorded the largest decrease (-4%) on domestic UK flows, Spain ↔ UK and France ↔ UK.
- In Week 31, three top 10 airlines posted flight numbers above 2019 levels: +38% for Wizz Air Group, +37% for Ryanair Group and +7% for Turkish Airlines Group.

Aircraft operators in the EUROCONTROL Network

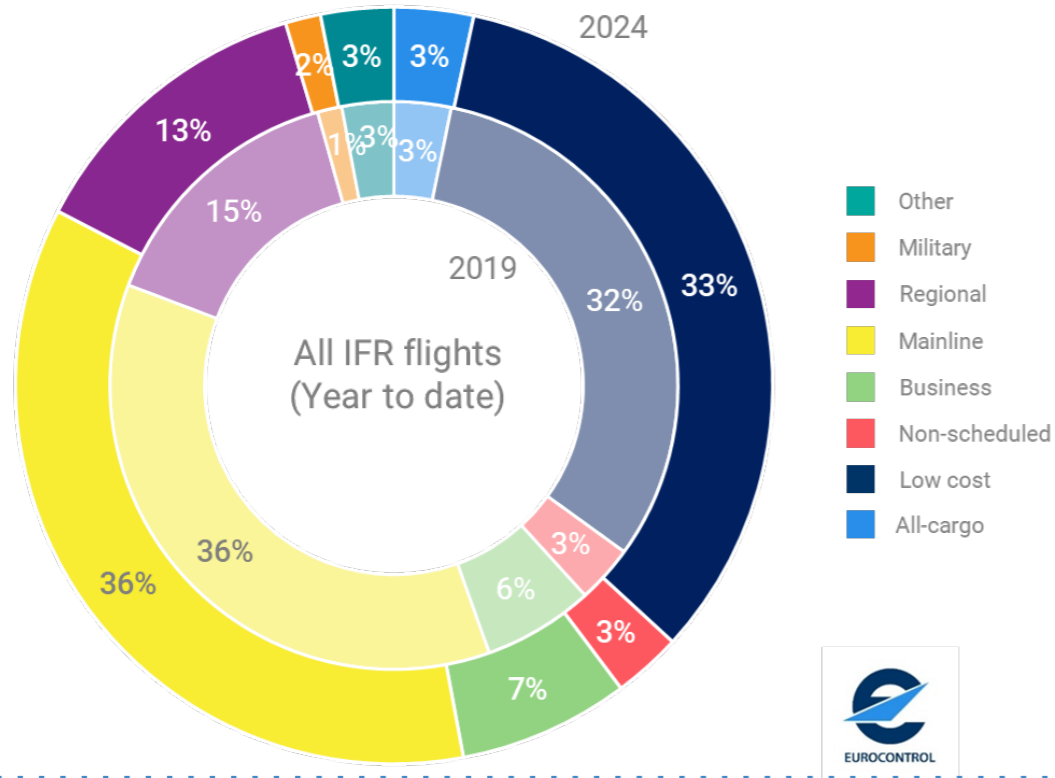
Compared to the equivalent week in 2023

Dep/Arr flights for week 29 Jul - 04 Aug 2024



Market segments in the EUROCONTROL Network

Average share of total flights (year to date)



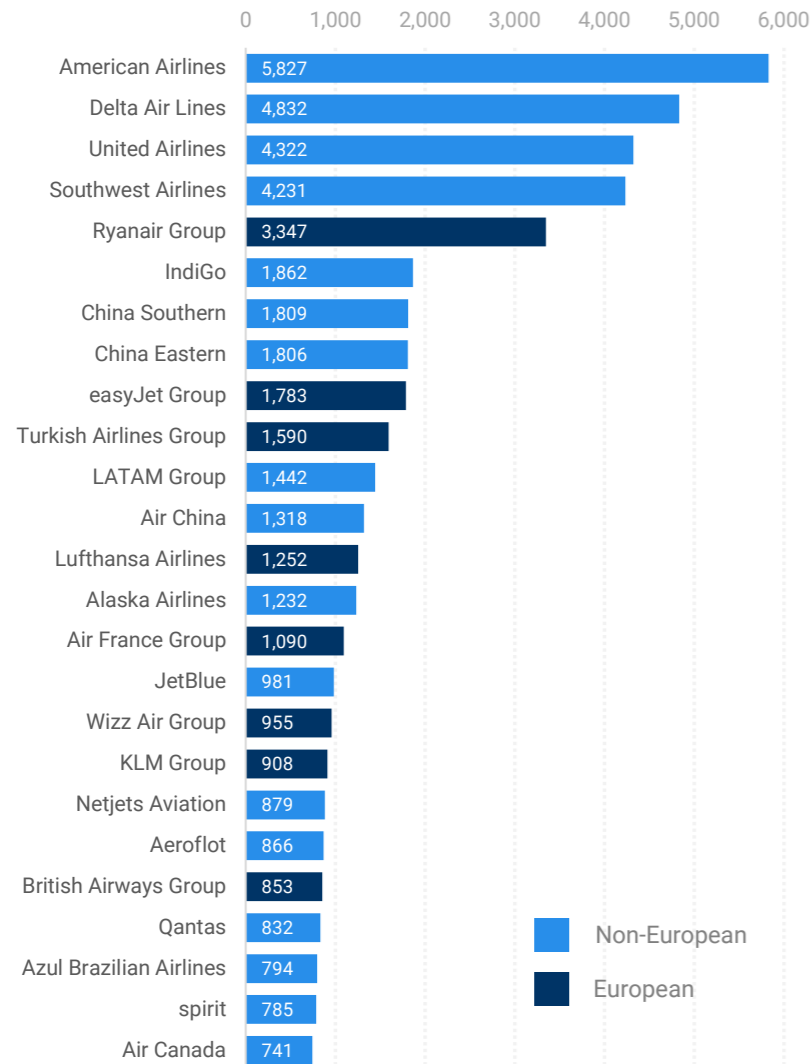
| No. | Market segment | Avg. flights | % prev week | % prev year | % 2019 |
|-----|----------------|--------------|-------------|-------------|--------|
| 1. | Low Cost | 12,028 | +0% | ↑ +5% | ↑ +6% |
| 2. | Mainline | 11,853 | +0% | ↑ +5% | ↓ -4% |
| 3. | Regional | 3,995 | -1% | ↑ +1% | ↓ -14% |
| 4. | Business | 2,586 | -6% | ↑ +8% | ↑ +25% |
| 5. | Non-Scheduled | 1,463 | +2% | ↑ +1% | ↓ -19% |
| 6. | All-cargo | 969 | -0% | ↓ -1% | ↑ +11% |
| 7. | Other | 907 | -6% | ↑ +5% | ↓ -19% |
| 8. | Military | 404 | -6% | ↑ +14% | ↑ +28% |

- ➔ Year-to-date (graph on left), the largest market segment (Mainline) has a 36% share, similar to the same period in 2019. The second largest segment (Low Cost) is at 33%, up by 1pp compared to 2019 (same period). 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.
- ➔ For the week 29 July – 04 August (compared to 2023), passenger flight numbers have recorded positive growth rates: Low Cost (+5%), Mainline (+5%) and Regional (+1%), Non-Scheduled (+2%). All-cargo is down (-1%) with fewer flights on flows domestic UK, Germany ↔ Italy and domestic France (when compared to 2023 levels).
- ➔ Four market segments are recording flights below 2019 levels. The non-scheduled market segment has seen a notable decline vs 2019 (-19%) due to the war in Ukraine (notably on flows Russia ↔ Türkiye, Türkiye ↔ Ukraine and Egypt ↔ Ukraine). The Regional market segment has declined by 14% compared to 2019, reflecting decreased domestic flows in Sweden, Spain and Germany. The Mainline segment (-4%) recorded fewer flights on flows Germany ↔ Russian Federation, Italy ↔ Russian Federation and domestic Germany flows.

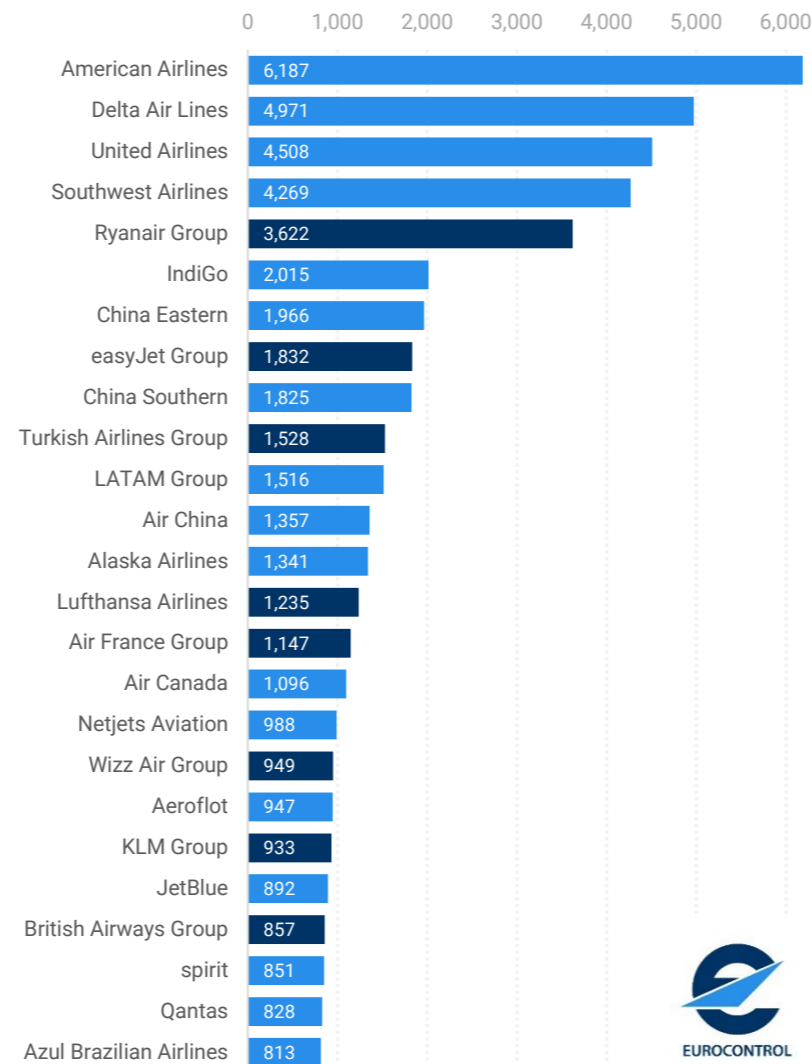
Top 25 global aircraft operators

(averaged daily departure flights)

7-day average (Week 29 Jul - 04 Aug 2023)



7-day average (Week 29 Jul - 04 Aug 2024)

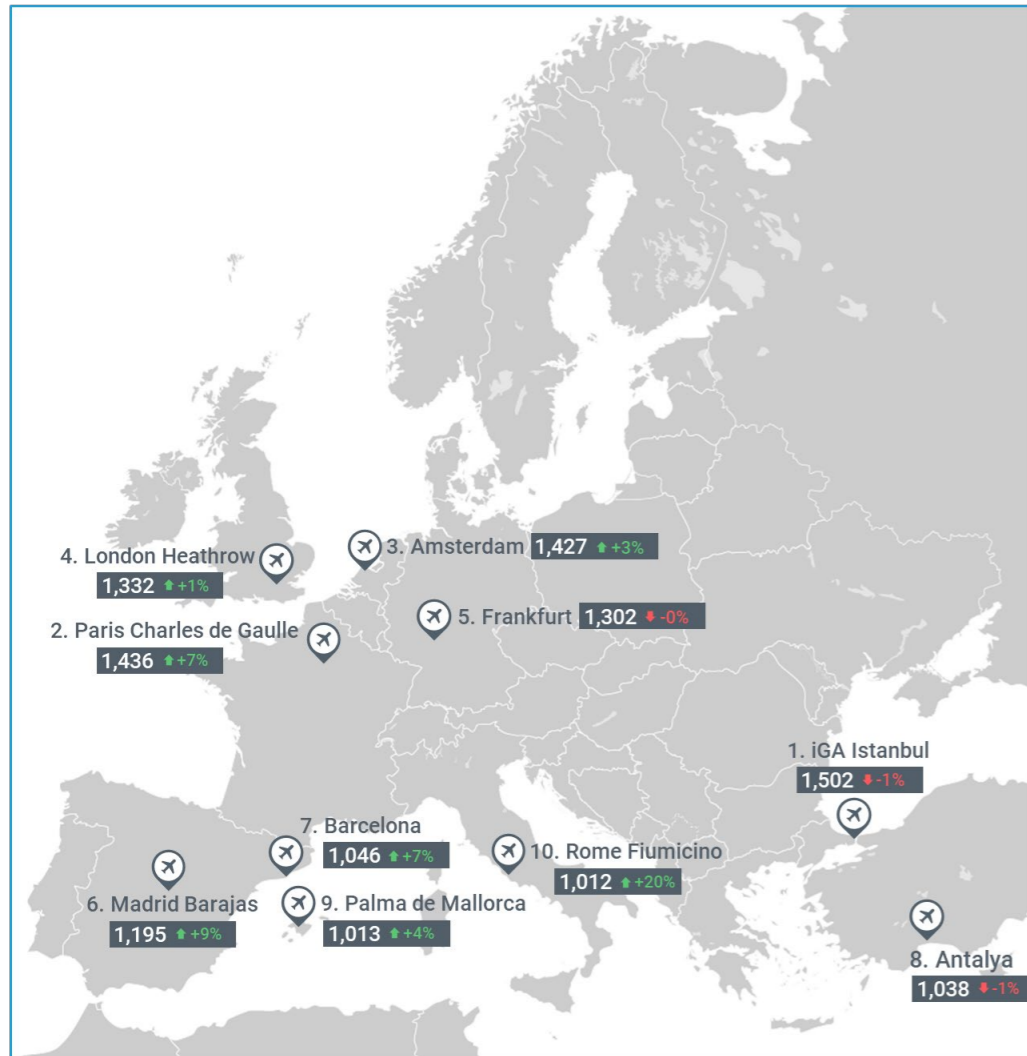


Over the last week:

- ✈ Eight European airlines are ranked in the top 25 global aircraft operators.
- ✈ Ryanair, the busiest European aircraft operating group, is currently 5th, similar ranking in the same week last year.
- ✈ Seven more European carriers make the top 25: easyJet Group (8th position), Turkish Airlines Group (10th), Lufthansa Airlines (14th), Air France Group (15th), Wizz Air Group (18th), KLM Group (20th) and British Airways Group (22nd).

Source: Flightradar24 Historical Global Utilisation data

Top 10 airports



Airport ranking

Week 29 Jul - 04 Aug 2024

[See more](#)

| No. | Airport | Avg. daily dep/arr flights | % prev week | % prev year | % 2019 |
|-----|-------------------------|----------------------------|-------------|-------------|--------|
| 1. | iGA Istanbul | 1,502 | +1% | ↓ -1% | ↑ +18% |
| 2. | Paris Charles de Gaulle | 1,436 | +5% | ↑ +7% | ↓ -6% |
| 3. | Amsterdam | 1,427 | -1% | ↑ +3% | ↓ -4% |
| 4. | London Heathrow | 1,332 | -2% | ↑ +1% | ↓ -2% |
| 5. | Frankfurt | 1,302 | +1% | ↓ -0% | ↓ -13% |
| 6. | Madrid Barajas | 1,195 | -1% | ↑ +9% | ↓ -3% |
| 7. | Barcelona | 1,046 | -1% | ↑ +7% | ↓ -2% |
| 8. | Antalya | 1,038 | -1% | ↓ -1% | ↑ +10% |
| 9. | Palma de Mallorca | 1,013 | -0% | ↑ +4% | ↑ +7% |
| 10. | Rome Fiumicino | 1,012 | +1% | ↑ +20% | ↑ +5% |

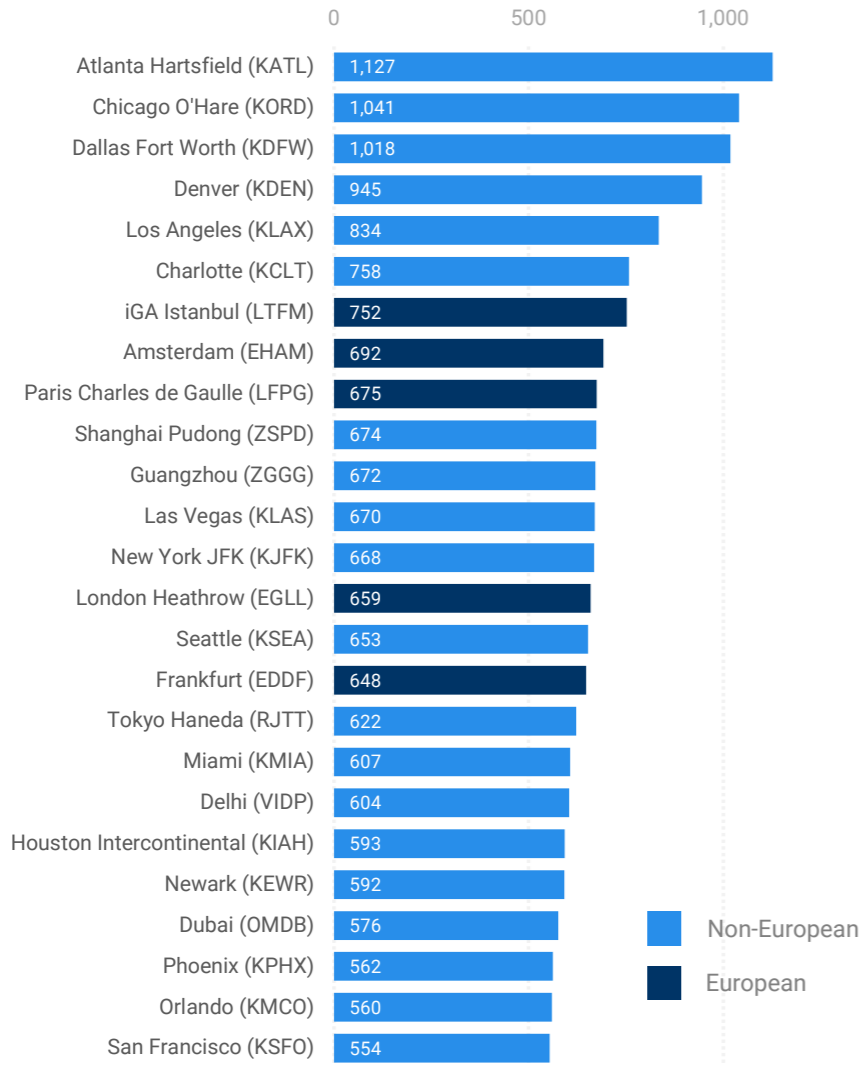
- ➔ One small change in the ranking compared to the previous edition saw Palma de Mallorca and Rome Fiumicino swap places.
- ➔ iGA Istanbul (1,502 flights per day, +1.3% vs previous week) remains the busiest airport followed by Paris CDG (1,436, +4.6%) and Amsterdam (1,427, -0.5%).
- ➔ On a weekly basis, all but three top airports are handling more flights than in 2023 (except iGA Istanbul -1.0%, Frankfurt: -0.2%, Antalya -0.6%), with increases ranging from +1% (London Heathrow) to +20% (Rome Fiumicino).
- ➔ Four of the top 10 airports (iGA Istanbul, Antalya, Palma de Mallorca and Rome) are currently handling traffic above their 2019 levels.



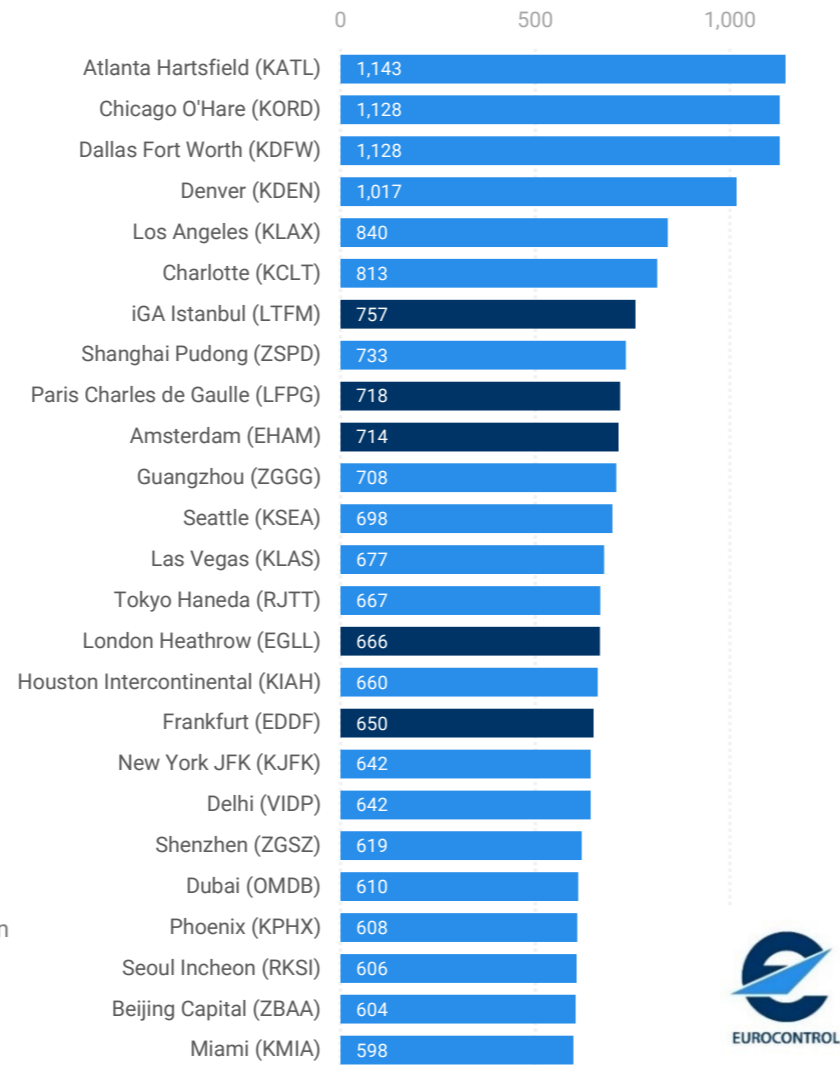
Top 25 global airport departures

(averaged daily departure flights)

7-day average (Week 29 Jul - 04 Aug 2023)



7-day average (Week 29 Jul - 04 Aug 2024)



Over the last week:

- ✈ Five European airports appear in the top 25 of global airport departures (similar to the corresponding week in 2023).
- ✈ There are three European airports in the top 10 with iGA Istanbul (7th), Paris CDG (9th) and Amsterdam (10th).
- ✈ The other two European airports in the top 25 are London Heathrow (15th) and Frankfurt (17th).
- ✈ There are now seven Asian airports in the top 10 against four a year ago.

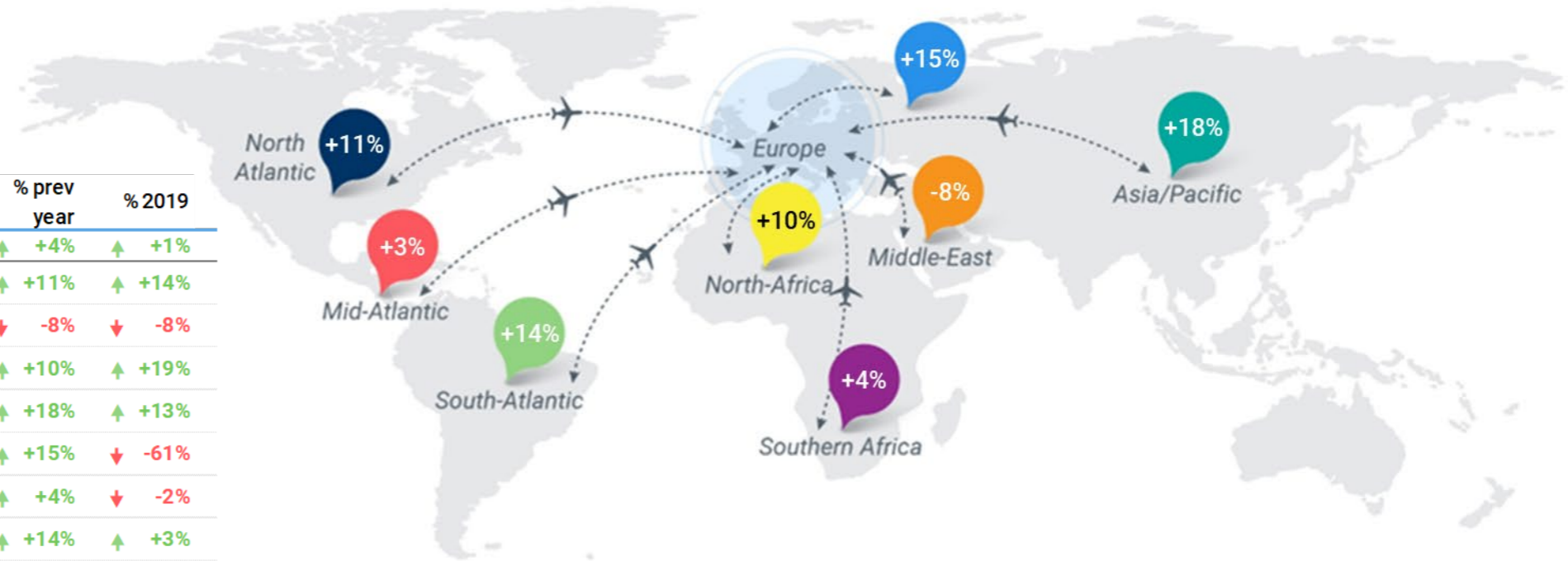
Source: Flightradar24 Historical Global Utilisation data



Traffic flows

(average daily departure/arrival flights for week 29 Jul - 04 Aug 2024)

| Region | Average daily flights | % prev week | % prev year | % 2019 |
|--------------------------|-----------------------|-------------|-------------|--------|
| Intra-Europe | 26,524 | ↓ -1% | ↑ +4% | ↑ +1% |
| Europe ↔ North Atlantic | 1,641 | ↓ -1% | ↑ +11% | ↑ +14% |
| Europe ↔ Middle-East | 1,603 | ↓ -0% | ↓ -8% | ↓ -8% |
| Europe ↔ North-Africa | 1,461 | ↑ +1% | ↑ +10% | ↑ +19% |
| Europe ↔ Asia/Pacific | 931 | ↑ +1% | ↑ +18% | ↑ +13% |
| Europe ↔ Other Europe | 512 | ↑ +2% | ↑ +15% | ↓ -61% |
| Europe ↔ Southern Africa | 309 | ↓ -2% | ↑ +4% | ↓ -2% |
| Europe ↔ South-Atlantic | 204 | ↑ +1% | ↑ +14% | ↑ +3% |
| Europe ↔ Mid-Atlantic | 178 | ↑ +0% | ↑ +3% | ↑ +2% |
| Non Intra-Europe | 6,839 | ↑ +0.1% | ↑ +7% | ↓ -6% |



- ➔ The main traffic flow - intra-European - recorded 26,524 daily flights last week, 1% lower than the previous week. Intercontinental flows amounted to 6,839 daily flights on average, slightly above (+0.1%) the previous week.
- ➔ The second-largest flow is to/from North America, with 1,641 flights per day, a 1% decrease compared to the previous week.
- ➔ The third-largest regional flow is between Europe and the Middle East with 1,603 average daily flights, a slight decrease (-0.3%) compared to the previous week.
- ➔ The fourth flow is to/from North Africa, where the 1,461 daily flights reflect a 1% increase on the previous week.
- ➔ Flows with 'Other Europe' (including the Russian Federation) remain massively reduced at -61% compared to 2019.
- ➔ Flows between Europe and the Asia/Pacific region are 18% above the same week in 2023 and +13% above 2019 levels

Top 10 long-haul country pairs

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

Week 29 Jul - 04 Aug 2024

| No. | Country pair | Average daily flights | % prev week | | % prev year | | % 2019 |
|-----|------------------|-----------------------|-------------|---|-------------|---|--------|
| 1. | UK ↔ US | 321 | -3% | ↓ | -3% | ↓ | -1% |
| 2. | France ↔ US | 175 | +4% | ↑ | +26% | ↑ | +28% |
| 3. | Germany ↔ US | 174 | -1% | ↓ | -2% | ↓ | -2% |
| 4. | Italy ↔ US | 112 | -2% | ↑ | +11% | ↑ | +27% |
| 5. | Spain ↔ US | 84 | -1% | ↑ | +11% | ↑ | +5% |
| 6. | Netherlands ↔ US | 77 | -3% | ↓ | -1% | ↓ | -10% |
| 7. | Ireland ↔ US | 76 | -5% | ↑ | +6% | ↑ | +6% |
| 8. | UAE ↔ UK | 63 | +2% | ↑ | +8% | ↓ | -5% |
| 9. | Iceland ↔ US | 54 | +1% | | n.a | | n.a |
| 10. | Canada ↔ France | 52 | +4% | ↑ | +13% | ↑ | +21% |



- ➔ 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 between United Arab Emirates & the UK and Canada & France.
- ➔ Only four long-haul flow posted increase on the previous week, namely the France ↔ US flow (+4%) – as a result of more flights by easyJet and Eastern Airways UK operators.
- ➔ Most of the US flows recorded a negative growth rates during week 31 (vs the week before).
- ➔ Five flows are currently above 2019 levels.

Economics

Week 29 Jul - 04 Aug 2024

02 Aug 2024
avg fuel price:

\$2.35 /gallon

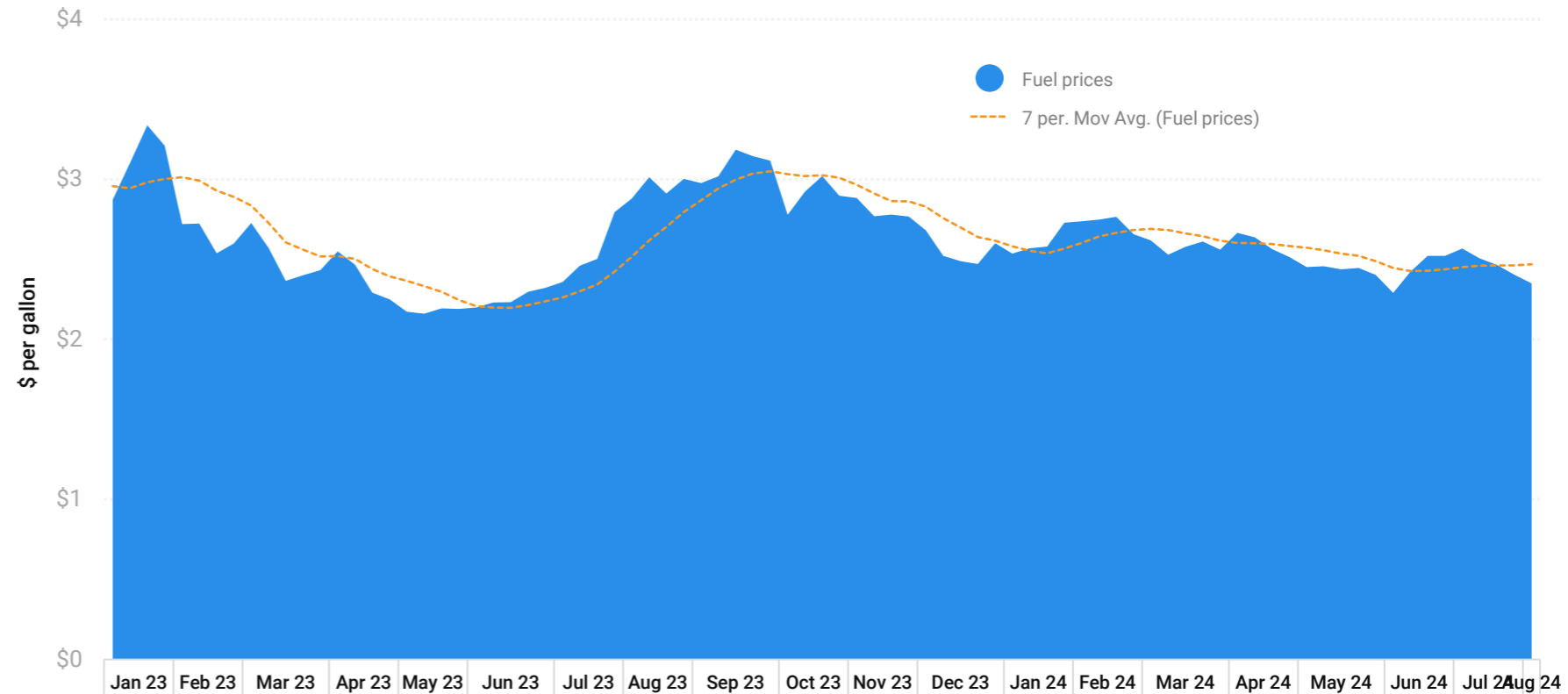


-5%

vs. \$2.47 /gallon
on 19 Jul 2024

Source: IATA/Platts

Jet fuel price (Europe)



Source: IATA/Platts

- ➔ The average price of jet fuel stood at 2.35 USD/gallon on 02 August 2024, a 5% decrease compared to the level of two weeks ago.
- ➔ Based on a moving average trend, fuel prices in Europe stabilised in early 2024, after a marked decline in Q4 2023. However, from the beginning of March 2024, another, slower decline could be seen before the recent uptick.
- ➔ On 2 June 2024, EU countries agreed a new package of sanctions against Russia over its war in Ukraine. OPEC+ agreed to extend the oil cuts of 2.2 million barrels/day until the end Q3 2024.

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.



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