AVIATION INTELLIGENCE+

EUROCONTROL

EUROPEAN AVIATION OVERVIEW

01-07 Jul 2024

Thursday 11 July 2024

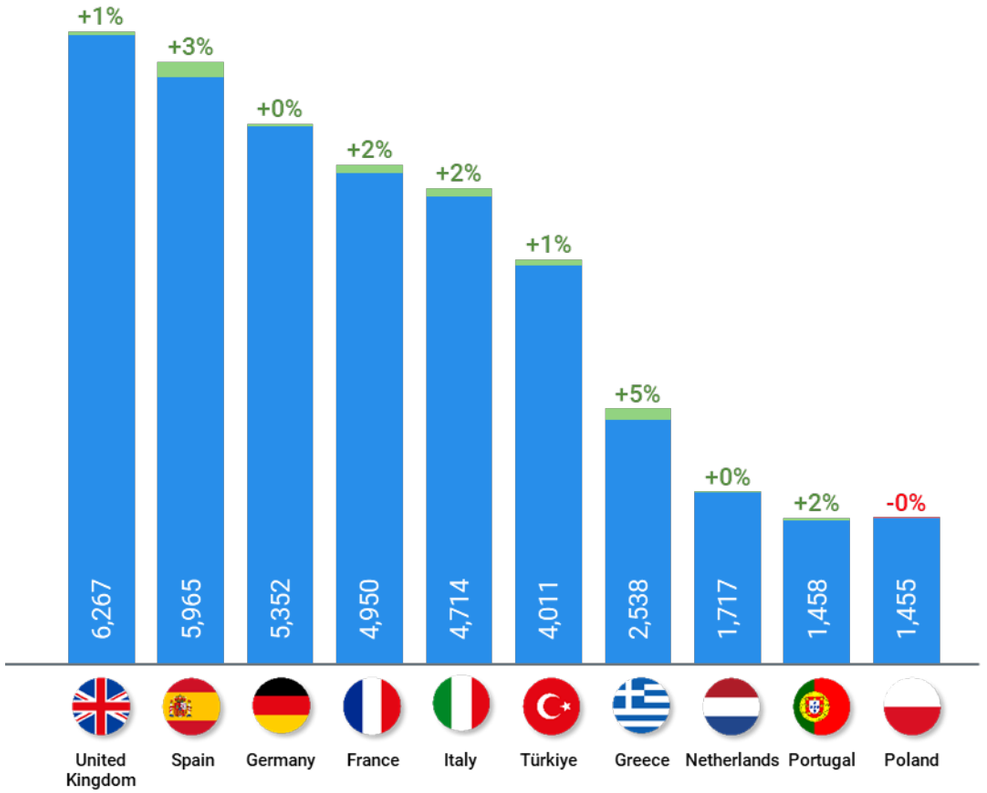
Headlines
(Week 01-07 Jul 2024)

- The network recorded 34,461 average daily flights (+4% vs 2023). This was only slightly higher (+0.6%) than the previous week's average.
- At country level, the top 10 states together recorded a 1.6% increase in the number of flights compared to the previous week.
- On average, the top 10 carriers all together deployed slightly higher capacities (+1.3%) compared to last week.
- En-route ATFM delays averaged just below 151,500 minutes per day (4.4 min/flight), -38% compared to the previous week. The main causes were capacity/staffing issues (53%) and weather issues (37%).
- The average jet fuel price in Europe reached 2.57 USD/gallon on 05 July 2024 (+6% compared to two weeks ago).

Top 10 busiest States

On week 01-07 Jul 2024

(all flights excl. overflights compared with previous week)



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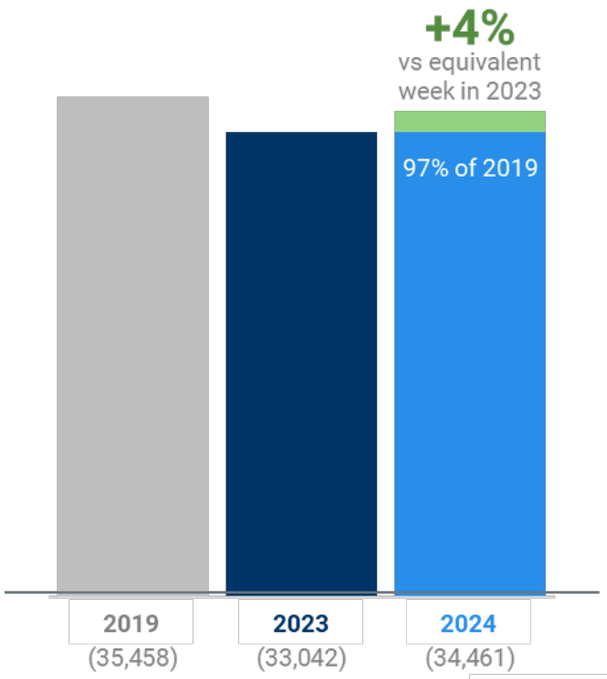
Traffic situation

Average daily flights (including overflights)

Week 01-07 Jul 2024



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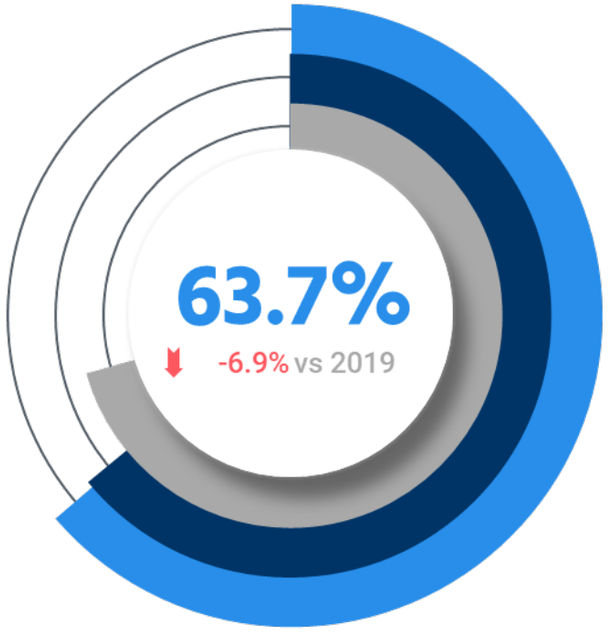
Arrival & departure punctuality

(all network scheduled flights)

Week 01-07 Jul 2024

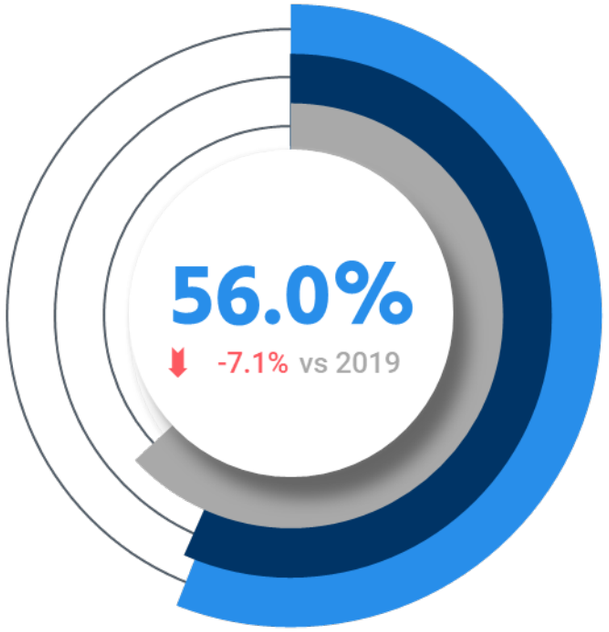
ARRIVAL PUNCTUALITY



70.6% _____ in 2019

64.0% _____ in 2023

DEPARTURE PUNCTUALITY



63.1% _____ in 2019

56.7% _____ in 2023

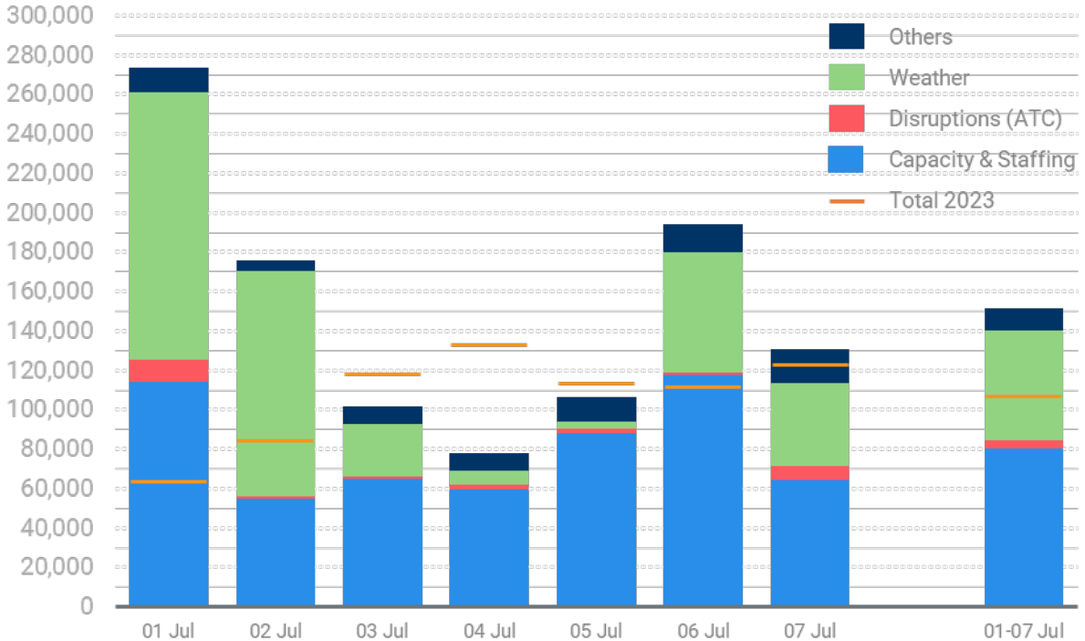
The pictures show the share of flights arriving/departing no later than 15 minutes after/before the scheduled time (OTP15).

- Network punctuality was similar to the equivalent week in 2023. Arrival punctuality was at 63.7%, and departure punctuality at 56.0%; however, the punctuality was worse compared to the same week in 2019 (-7pp for both arrival and departure).
- The network continued to be affected by convective weather on the south-east axis throughout the week, notably in Hungary and Germany.
- Athens continued to have daily ATC capacity regulations throughout the week, with 04 July seeing delays due to convective weather.
- Amsterdam saw daily regulations for aerodrome capacity due to high demand; 06 July saw high delays due to strong winds.
- Gatwick ATFM delays reduced compared to last year, however it did see some regulations on 06 and 07 July due to convective weather, with 07 July having the highest delays.
- Lisbon also saw a slight reduction in ATFM delays but it was still impacted by aerodrome capacity throughout the week.
- Barcelona experienced regulations due to weather CBs (high delays on 01 July).

En-route ATFM delays

Delays per cause (EUROCONTROL Area)

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



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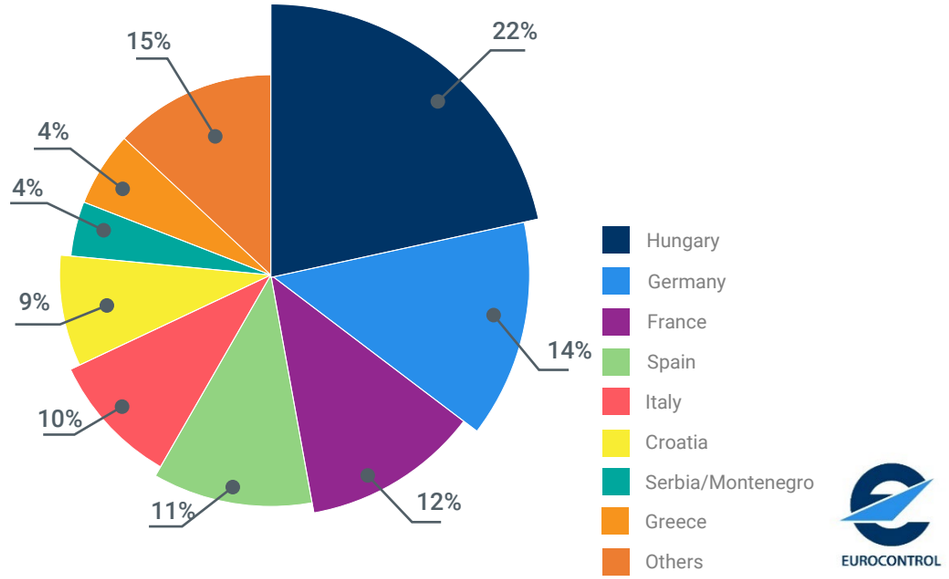
- Week 27 (01-07 July) registered fewer en-route delays (-38%) compared to the previous week with an average of 151,500 minutes, equivalent to 4.4 min/flight. En-route ATFM delays were 42% higher than in the equivalent operational week of 2023. ATC capacity delays, as well as Weather issues, were higher this year than a year ago.
- Capacity/staffing was the main cause (53%), owing notably on Monday and Saturday, with issues in Budapest ACC, Karlsruhe UAC, Athens + Makedonia ACCs, and Reims ACC.
- Weather accounted for 37% of en-route delays (390,000 minutes), especially due to the situation in Hungary and the Balkans on Monday and Tuesday.

Share of en-route ATFM delays

Week 01-07 Jul 2024



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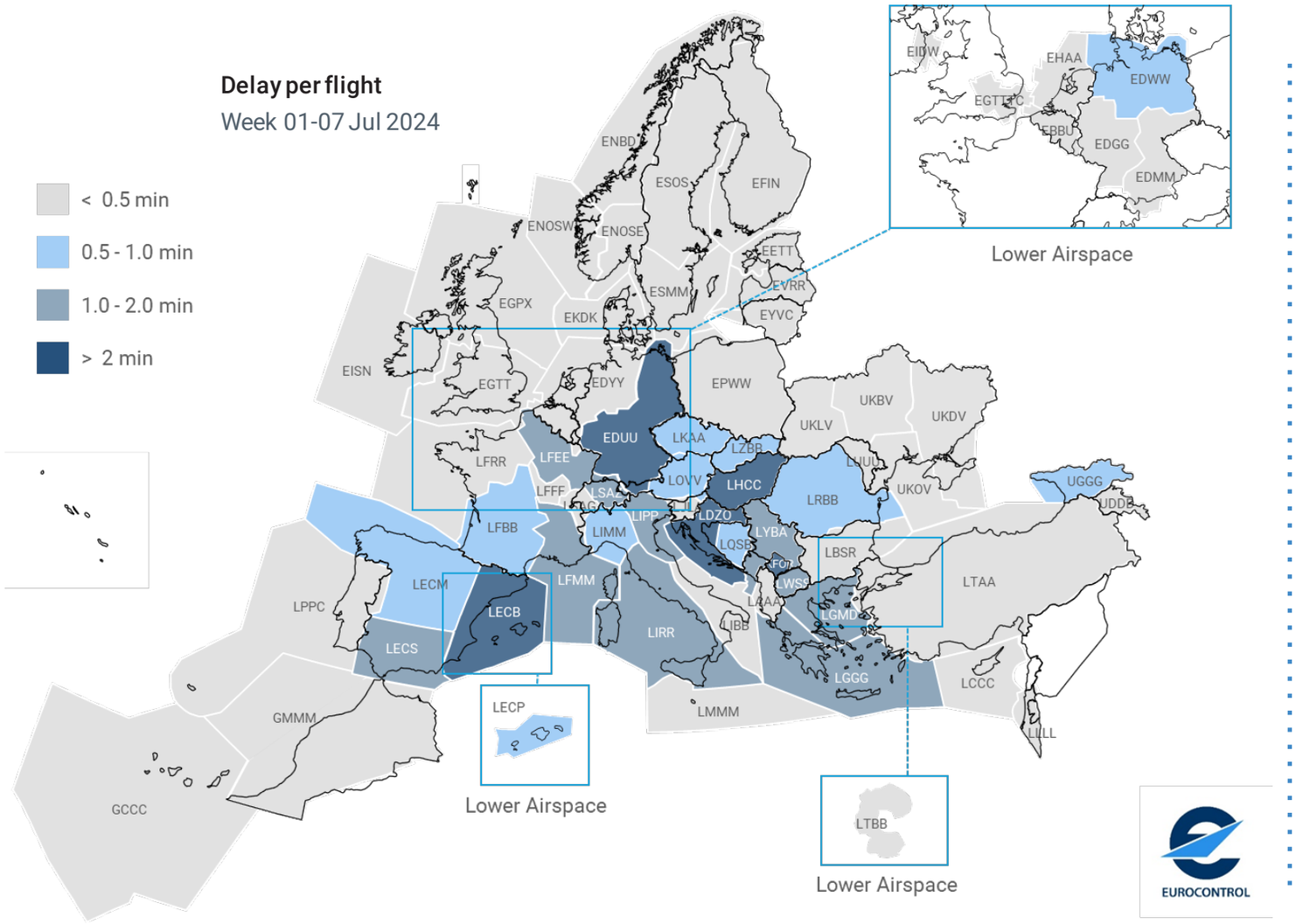
- Hungary accounted for **22%** of all en-route ATFM delays with 5.8pp attributed to convective weather, 9.9pp to capacity + staffing. The traffic demand was 20% above 2019 with onload from L'viv FIR and a heavy flow Moscow – Istanbul,
- Germany accounted for **14%** with 11.5pp attributed to Karlsruhe UAC (of which 8.3pp capacity and 3.4pp weather), 0.9pp to Munich ACC (mainly weather), 0.6pp to Langen ACC (capacity) and 0.7pp to Bremen ACC (capacity and weather).
- France accounted for **12%** with 4.6pp attributed to Reims ACC (capacity, staffing and weather), 4.1pp to Marseille ACCs (capacity and staffing) and 0.4pp to Paris ACC.

En-route ATFM delayed flights per Area Control Centre



- Over Week 27, fifteen ACCs recorded en-route ATFM delays higher than 1.0 min/flight.
- Budapest ACC recorded 8.9 min/flight mainly due to daily protective capacity measures with significant on-load from flights avoiding L'VIV FIR. Traffic for the week was 20% above 2019 with convective weather (2.4pp) mostly disruptive on Monday and Tuesday.
- Zagreb ACC recorded 3.74 min/flight owing to traffic for the week being 30% above 2019 and convective weather (2.0pp) complicating traffic management and limiting sector capacity, notably on Monday and Tuesday.
- Karlsruhe ACC recorded 2.9 min/flight due to. convective weather (0.9pp) notably on Monday and Saturday. Delay mostly accumulated in South sector group but not excessively due to the S24 mitigation plan.
- Barcelona ACC recorded 2.7 min/flight owing to convective weather (0.6pp, particularly disruptive on Monday and Saturday). ATC Capacity represented 0.9pp with increasing seasonal demand to/from local and island airports.

Top 10 States

Departures and arrivals

Week 01-07 Jul 2024

See more

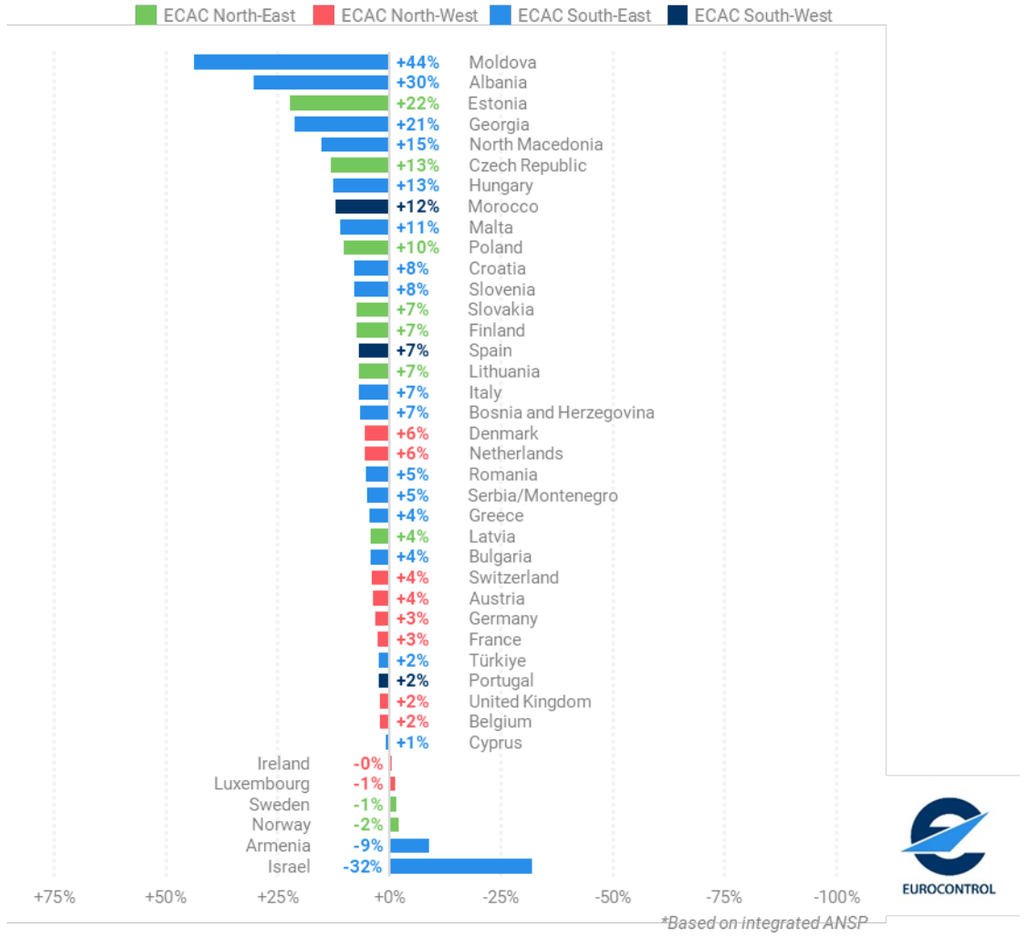
No.	Country	Average daily flights	% prev week	% prev year	% 2019
1.	United Kingdom	6,267	+1%	+2%	-7%
2.	Spain	5,965	+3%	+7%	+6%
3.	Germany	5,352	+0%	+3%	-14%
4.	France	4,950	+2%	+3%	-5%
5.	Italy	4,714	+2%	+7%	+6%
6.	Türkiye	4,011	+1%	+2%	+13%
7.	Greece	2,538	+5%	+4%	+17%
8.	Netherlands	1,717	+0%	+6%	-6%
9.	Portugal	1,458	+2%	+2%	+10%
10.	Poland	1,455	-0%	+10%	+12%

- The top 10 States, in aggregate, recorded 1.6% more flights than in the previous week .
- Compared to the previous edition, Portugal has entered the top 10, while Norway has dropped out.
- All States recorded a higher or similar number of flights vs the previous week. Greece recorded the greatest increase (+5%, mainly thanks to Aegean Group and Wizz Air Group) on domestic flows, and on the flows Greece ↔ Italy & France ↔ Greece . Spain posted a 3% increase (owing mainly to Ryanair Group and small operators) on flows: domestic Spain, Spain ↔ UK and Spain ↔ Italy.
- Six States in the top 10 are recording traffic at or above 2019 levels (Greece, Türkiye, Poland, Portugal, Italy and Spain), with the remainder between 5% and 14% below pre-COVID levels.
- At network level, the lowest number of flights compared to the same week in 2023 was to/from Israel (-32%).

States in the EUROCONTROL Network

Compared to the equivalent week in 2023

Dep/Arr flights for week 01-07 Jul 2024



*Based on integrated ANSP

Top 10 aircraft operators

Week 01-07 Jul 2024 (avg daily flights)

No.	Aircraft operator	Average daily flights	% prev week	% prev year	% 2019
1.	Ryanair Group	3,596	+1%	+8%	+37%
2.	easyJet Group	1,829	+5%	+5%	-3%
3.	Turkish Airlines Group	1,598	-2%	-3%	+9%
4.	Lufthansa Airlines	1,248	+3%	-1%	-21%
5.	Air France Group	1,175	+2%	+5%	-12%
6.	KLM Group	920	+0%	+9%	-3%
7.	Wizz Air Group	909	+4%	-1%	+37%
8.	British Airways Group	858	+1%	+3%	-13%
9.	Vueling	705	-0%	+0%	-4%
10.	SAS Group	632	-5%	-1%	-20%

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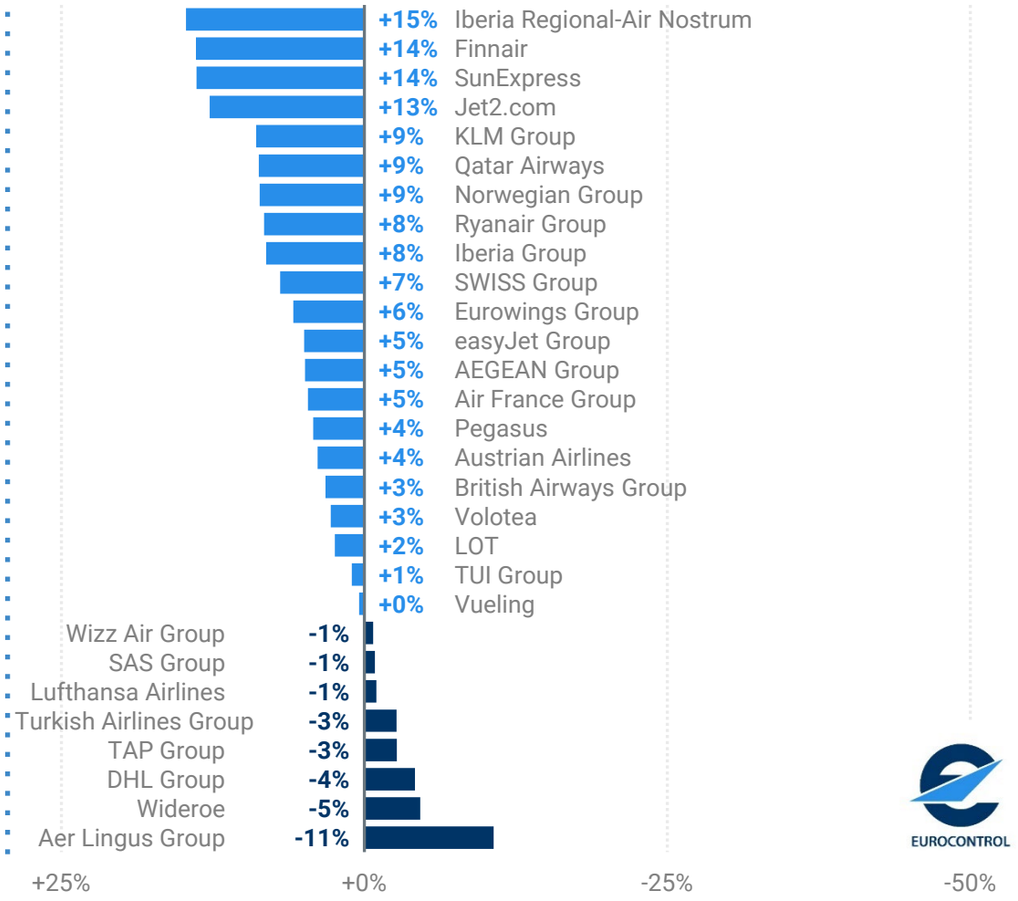
- The top 10 aircraft operators, in aggregate, posted a slight increase (1.3%) in number of flights compared to the previous week.
- The largest increase was for easyJet Group (+5%), mainly on flows France ↔ UK, Spain ↔ UK and domestic UK.
- The largest decrease was recorded by SAS Group (-5%), mostly due to losses on domestic flows in Norway and in Sweden as well as on Denmark ↔ Germany .
- Turkish Airlines Group recorded a 2% decrease: the airline has had to ground some aircraft (A321 NEO) for engine maintenance since the beginning of the year.
- In Week 27, three top 10 airlines posted flight numbers above 2019 levels: +37% for Ryanair Group, +37% for Wizz Air Group and +9% for Turkish Airlines Group.

Aircraft operators in the EUROCONTROL Network

Compared to the equivalent week in 2023

Dep/Arr flights for week 01-07 Jul 2024



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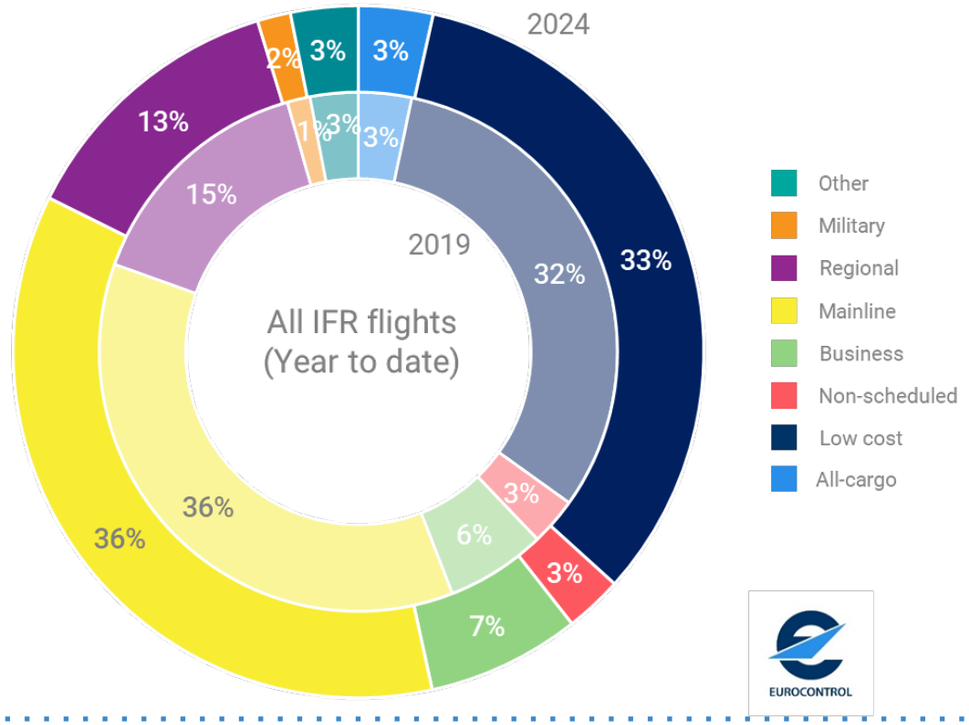
Market segments in the EUROCONTROL Network

Average share of total flights (year to date)

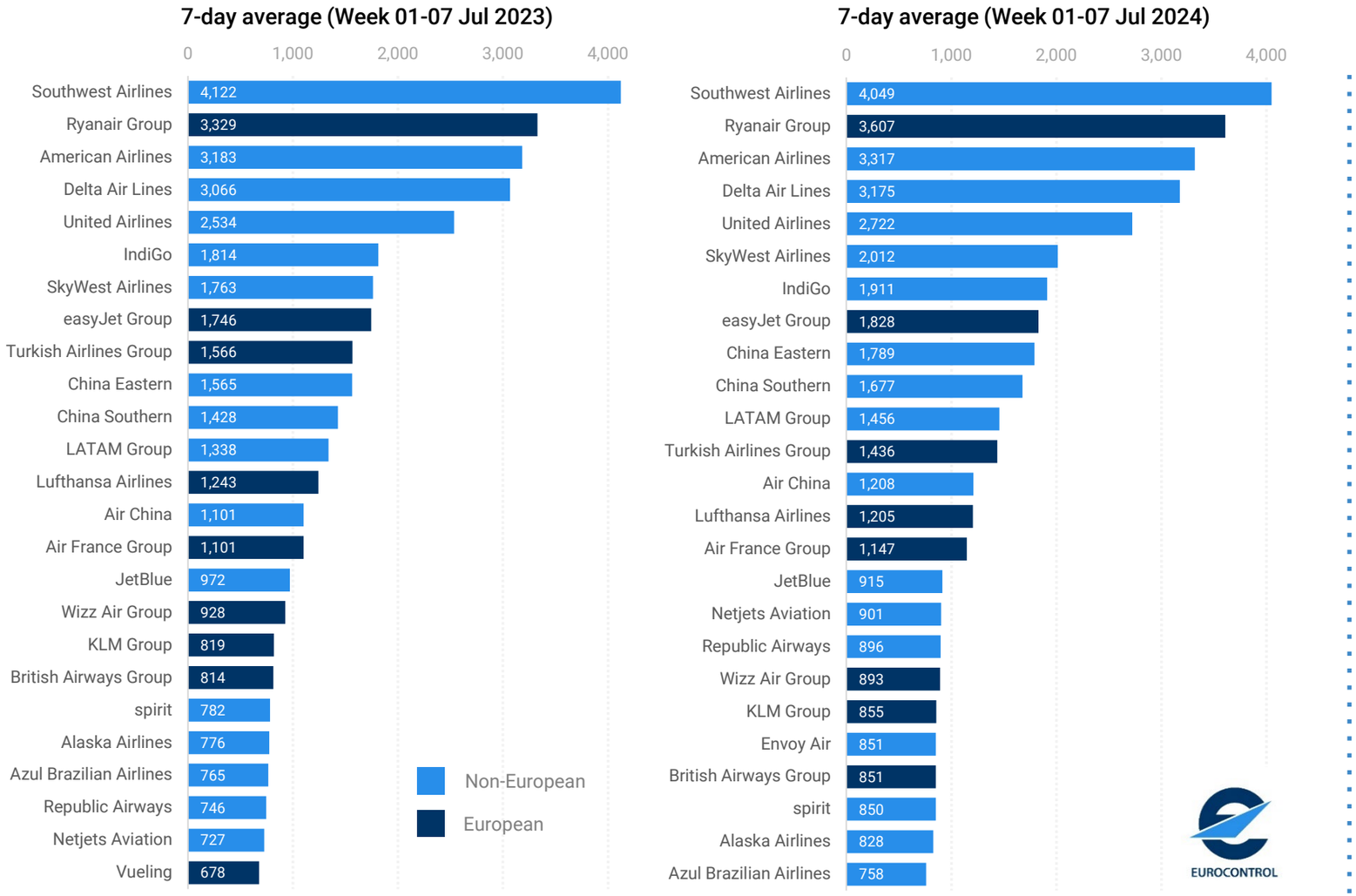


No.	Market segment	Avg. flights	% prev week	% prev year	% 2019
1.	Low Cost	11,957	+2%	+7%	+6%
2.	Mainline	11,800	+1%	+5%	-4%
3.	Regional	4,068	+0%	+2%	-13%
4.	Business	2,763	-5%	-1%	+23%
5.	Non-Scheduled	1,444	+2%	+3%	-18%
6.	Other	1,022	-3%	+1%	-1%
7.	All-cargo	996	-2%	-4%	-0%
8.	Military	412	-15%	+4%	+25%

- 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 1-7 July (compared to 2023), passenger flight numbers have recorded strong growth rates: Low Cost (+7%), Mainline (+5%) and Regional (+2%). All-cargo is down (-4%) with fewer flights on flows Belgium ↔ Hungary, domestic UK, Germany ↔ Italy and domestic France, when compared to 2023 levels.
- Three market segments are recording flights above 2019 levels. The non-scheduled market segment has seen a notable decline vs 2019 (-18%) due to the war in Ukraine (notably on flows Russia ↔ Türkiye and Egypt ↔ Ukraine). The Regional market segment has declined by 13% compared to 2019, reflecting decreased domestic flows in Sweden, UK and Germany.

Top 25 global aircraft operators

(average daily departure flights)

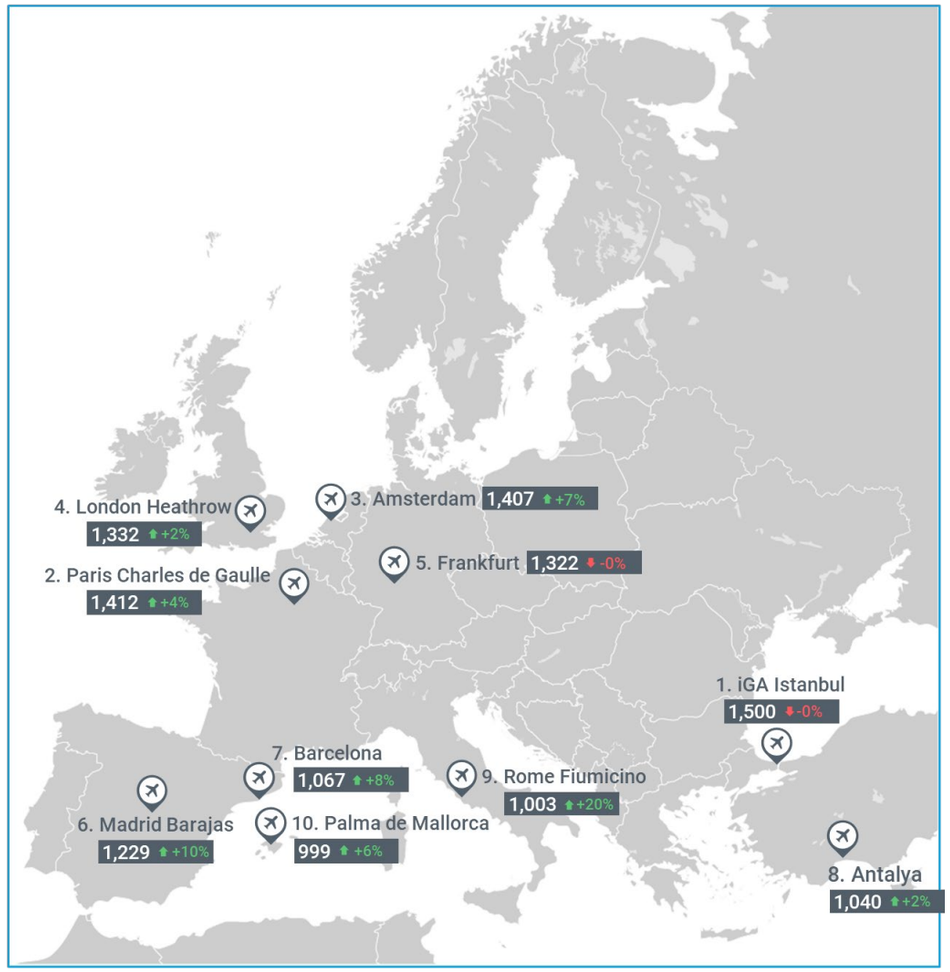


Source: Flightradar24 Historical Global Utilisation data

Over the last week:

- Eight European airlines are ranked in the top 25 global aircraft operators (Vueling is no longer in the top 25 list as it was in 2023).
- Ryanair, the busiest European aircraft operating group, is currently 2nd, the same place when compared to two weeks ago – and to same week last year.
- Seven more European carriers make the top 25: easyJet Group (8th position), Turkish Airlines Group (12th), Lufthansa Airlines (14th), Air France Group (15th), Wizz Air Group (19th); KLM Group (20th) and British Airways Group (22nd).

Top 10 airports



Airport ranking

Week 01-07 Jul 2024

See more

No.	Airport	Avg. daily dep/arr flights	% prev week	% prev year	% 2019
1.	iGA Istanbul	1,500	-2%	-0%	+18%
2.	Paris Charles de Gaulle	1,412	+2%	+4%	-7%
3.	Amsterdam	1,407	+0%	+7%	-5%
4.	London Heathrow	1,332	+1%	+2%	-3%
5.	Frankfurt	1,322	+3%	-0%	-13%
6.	Madrid Barajas	1,229	+0%	+10%	-3%
7.	Barcelona	1,067	+1%	+8%	-1%
8.	Antalya	1,040	+3%	+2%	+11%
9.	Rome Fiumicino	1,003	+2%	+20%	+4%
10.	Palma de Mallorca	999	+4%	+6%	+9%

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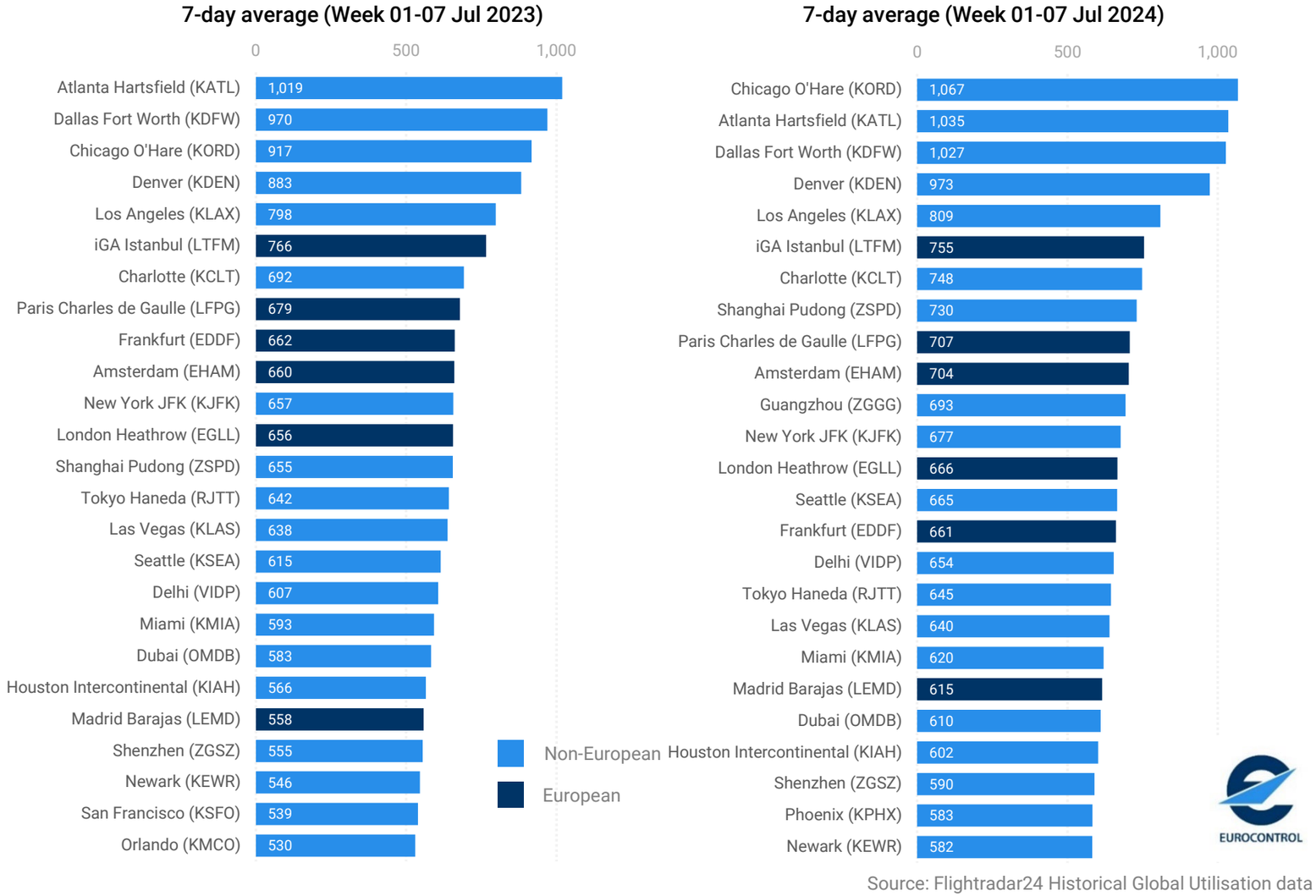
- Some small changes in the ranking compared to the previous edition saw Paris CDG and iGA Istanbul swap places. Munich dropped out and Palma de Mallorca entered the top 10.
- iGA Istanbul (1,500 flights per day, -2% vs the previous week) remains the busiest airport followed by Paris CDG (1,412, +2%) and Amsterdam (1,407, +0%).
- All top airports are handling more flights than in 2023 (except iGA Istanbul and Frankfurt: similar levels), with increases ranging from +2% (London Heathrow) to +20% (Rome Fiumicino).
- Four of the top 10 airports (iGA Istanbul, Antalya, Rome and Palma de Mallorca) are currently handling traffic above their 2019 levels.

Top 25 global airport departures

(average daily departure flights)



Source: Flightradar24 Historical Global Utilisation data

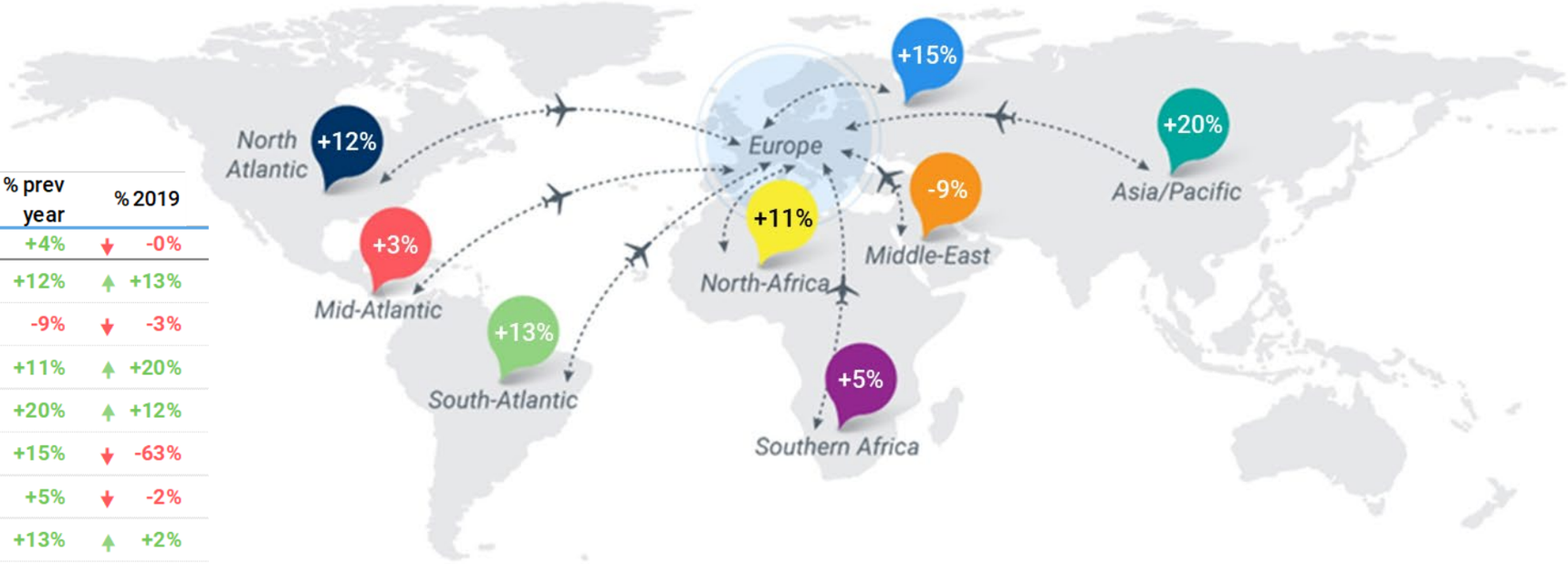
Over the last week:

- Six 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 (6th), followed by Paris CDG (9th) and Amsterdam (10th).
- The three other European airports in the top 25 are London Heathrow (13th), Frankfurt (15th) and Madrid Barajas (20th).
- There is now an Asian airport in the top 10 – Shanghai (8th)

Traffic flows

(average daily departure/arrival flights for week 01-07 Jul 2024)

Region	Average daily flights	% prev week	% prev year	% 2019
Intra-Europe	26,807	+1%	+4%	-0%
Europe ↔ North Atlantic	1,644	-2%	+12%	+13%
Europe ↔ Middle-East	1,623	+1%	-9%	-3%
Europe ↔ North-Africa	1,415	+3%	+11%	+20%
Europe ↔ Asia/Pacific	926	+2%	+20%	+12%
Europe ↔ Other Europe	503	+2%	+15%	-63%
Europe ↔ Southern Africa	303	+2%	+5%	-2%
Europe ↔ South-Atlantic	201	+4%	+13%	+2%
Europe ↔ Mid-Atlantic	170	+4%	+3%	-2%
Non Intra-Europe	6,784	+1%	+7%	-5%



- The main traffic flow - intra-European - recorded 26,807 daily flights last week, 1% higher than the previous week. Intercontinental flows amounted to 6,784 daily flights on average, a 1% increase vs the previous week.
- The second-largest flow is to/from North America, with 1,644 flights per day, a 2% decrease compared to the previous week on flows between Europe and United States and Canada.
- The third-largest regional flow is between Europe and the Middle East with 1,623 average daily flights, a 1% increase compared to the previous week.
- The fourth flow is to/from North Africa, where the 1,415 daily flights reflect a 3% increase on the previous week.
- Flows with 'Other Europe' (including the Russian Federation) remain massively reduced at -63% compared to 2019.
- Flows between Europe and the Asia/Pacific region are 20% above the same week in 2023 and 12% above 2019 levels

Top 10 long-haul country pairs

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

Week 01-07 Jul 2024

No.	Country pair	Average daily flights	% prev week	% prev year	% 2019
1.	UK ↔ US	330	-2%	-1%	+1%
2.	Germany ↔ US	170	-5%	-3%	-5%
3.	France ↔ US	162	-2%	+12%	+16%
4.	Italy ↔ US	112	+0%	+16%	+29%
5.	Spain ↔ US	87	+0%	+19%	+7%
6.	Netherlands ↔ US	82	+0%	+7%	-8%
7.	Ireland ↔ US	76	-6%	+5%	+6%
8.	UAE ↔ UK	62	+4%	+8%	-9%
9.	Iceland ↔ US	54	+1%	n.a	n.a
10.	Canada ↔ UK	50	-3%	+2%	-10%

- 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 & the UK.
- Only two long-haul flows posted increases on the previous week, with the largest increase in the UAE ↔ UK flow (+4%) – as a result of more flights by British Airways and Dubai Air Wing.
- Most of the US flows recorded flat or negative growth rates during week 27 (vs the week before) owing to the Independence Day (national public holiday in the United States) on Thursday the 4th of July.
- Five flows are currently at or above 2019 levels.

Economics

Week 01-07 Jul 2024

05 Jul 2024
avg fuel price:

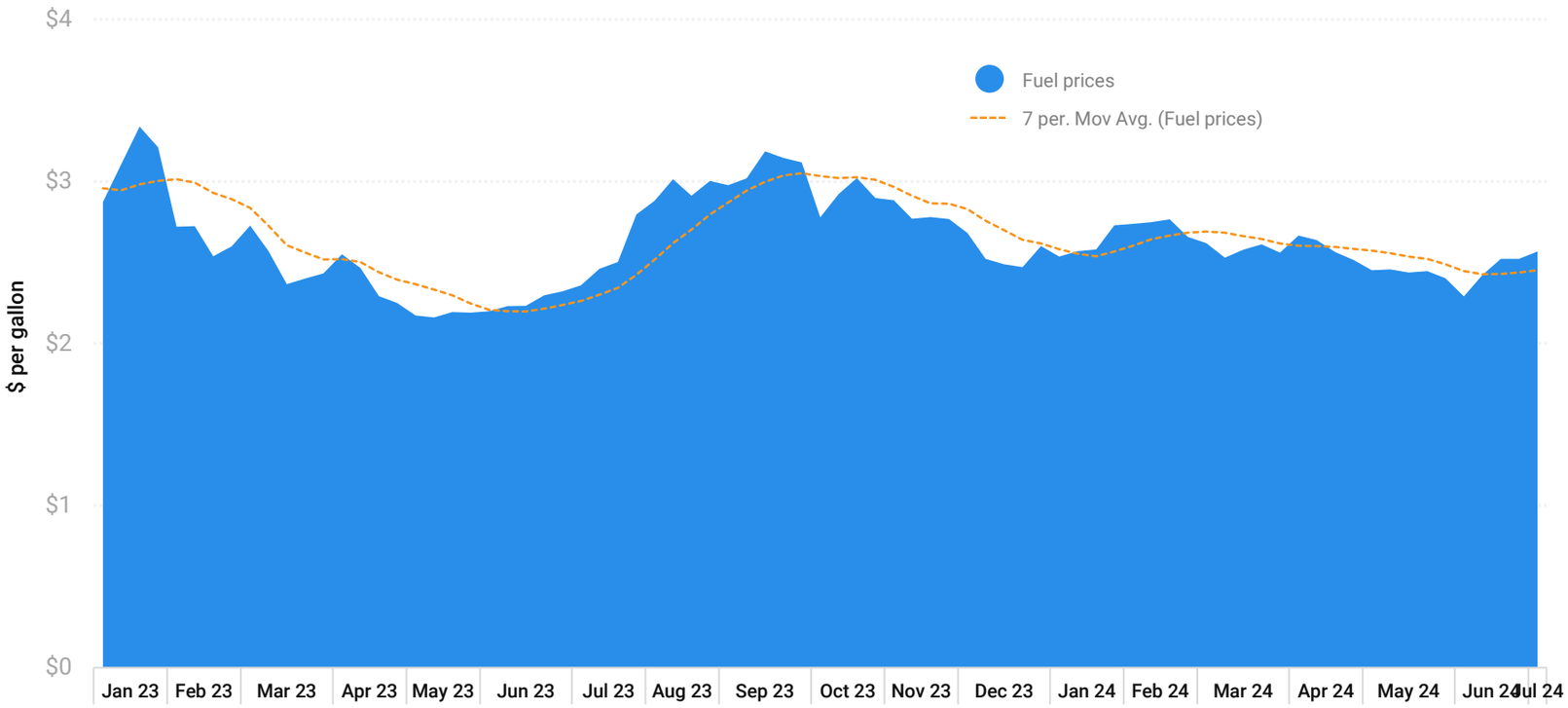
$2.57 /gallon

6%

vs. $2.42 /gallon
on 14 Jun 2024

Source: IATA/Platts

Jet fuel price (Europe)



Source: IATA/Platts

- The average price of jet fuel stood at 2.57 USD/gallon on 05 July 2024, a 6% increase 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.

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