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EUROPEAN AVIATION OVERVIEW

03-09 Jun 2024

Thursday 13 June 2024

Headlines

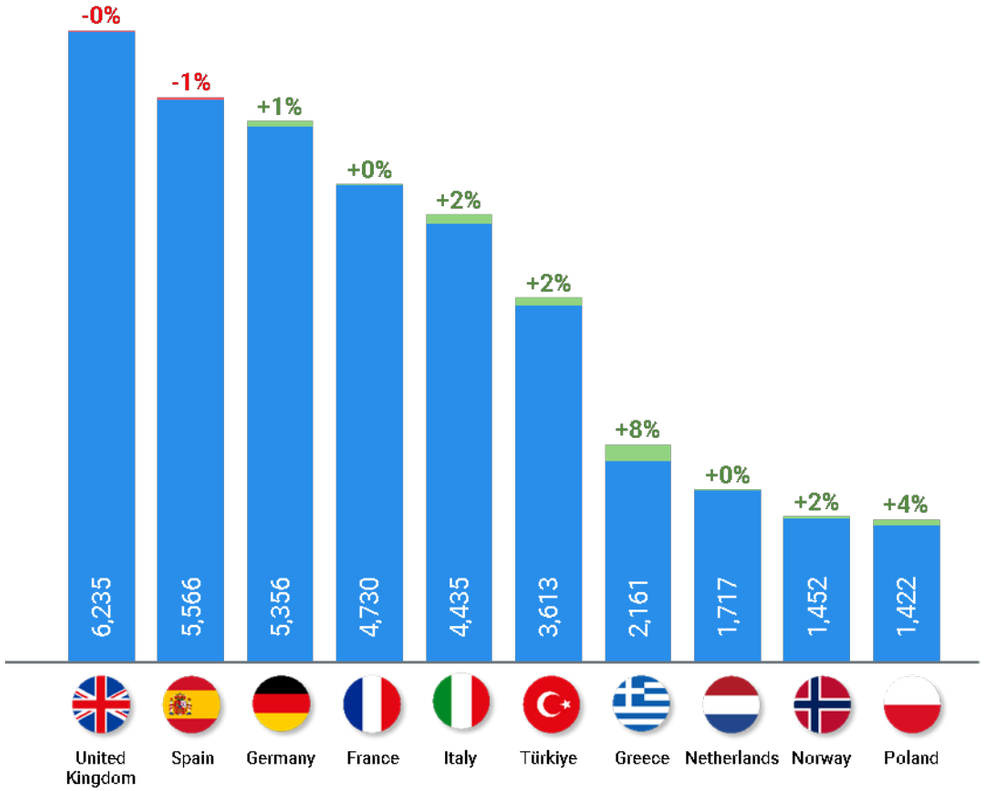
(Week 03-09 Jun 2024)

- The network recorded 33,027 average daily flights (+6% vs 2023). This was slightly higher (+1.6%) than the previous week's average.
- At country level, the top 10 states together recorded a 1.2% increase in the number of flights compared to the previous week.
- On average, the top 10 carriers all together deployed slightly higher capacities (+1.2%) compared to last week.
- En-route ATFM delays averaged just below 66,800 minutes per day (2.0 min/flight), -15% compared to the previous week. The main causes were capacity/staffing issues (45%) and weather (42%); most affected were France and Germany.
- The average jet fuel price in Europe reached 2.29 USD/gallon on 07 June 2024 (-6% compared to two weeks ago).
- In April 2024, all-prices inflation posted a 2.6% annual increase; ticket prices recorded a 7% annual decrease (excluding inflation).

Top 10 busiest States

On week 03-09 Jun 2024

(all flights excl. overflights compared with previous week)



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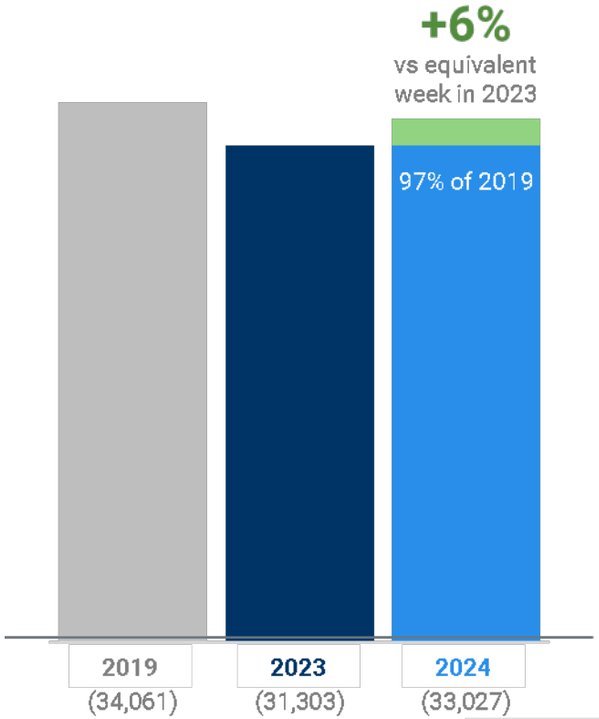
Traffic situation

Average daily flights (including overflights)

Week 03-09 Jun 2024



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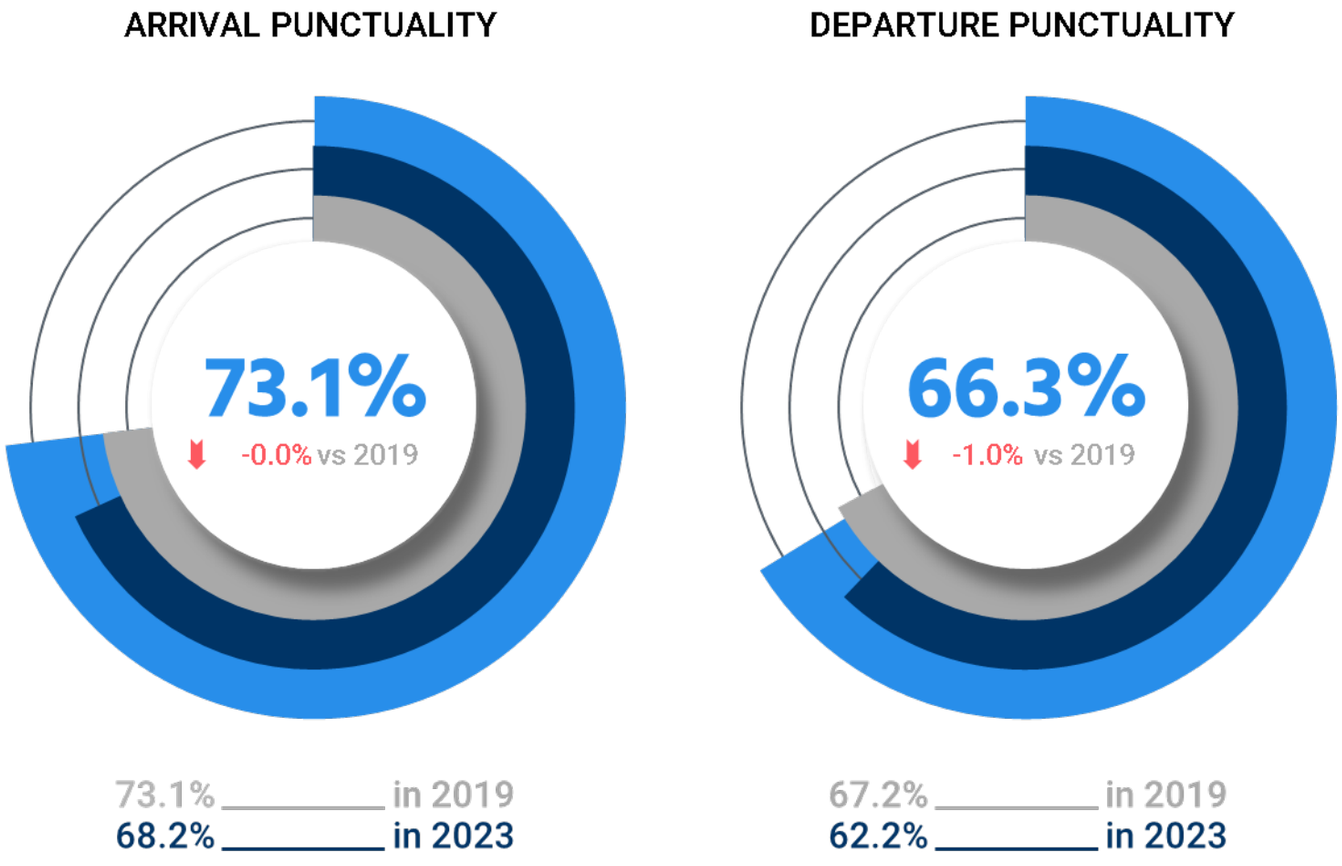
Arrival & departure punctuality

(all network scheduled flights)

Week 03-09 Jun 2024



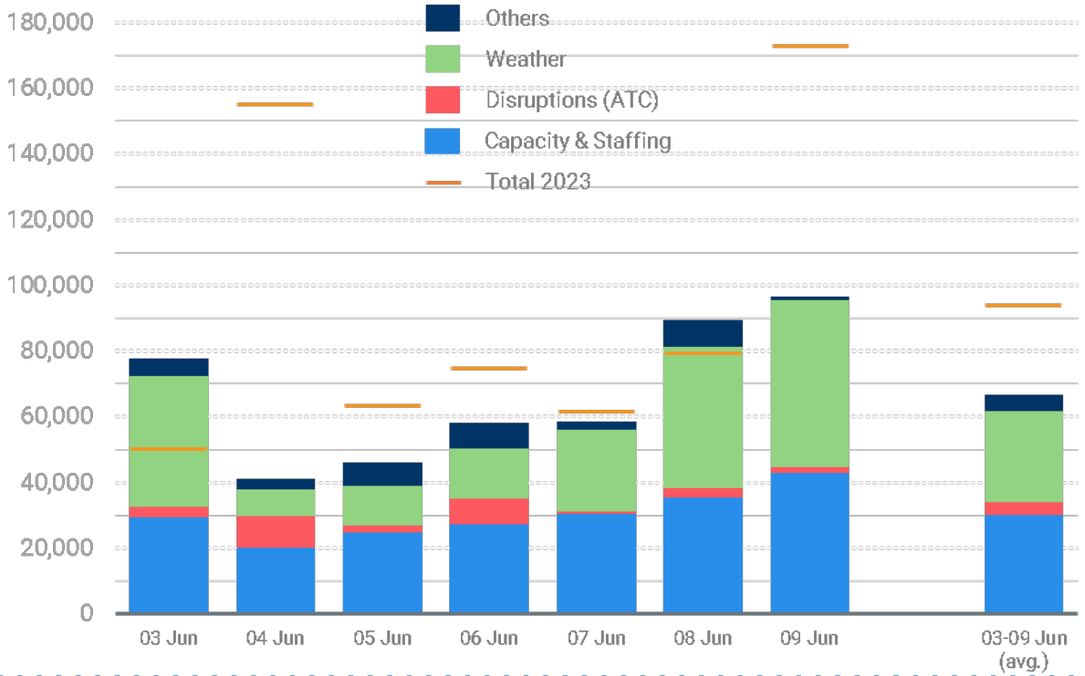
The pictures show the share of flights arriving/departing no later than 15 minutes after/before the scheduled time (OTP15).

- Network punctuality improved when compared to the equivalent week in 2023. Arrival punctuality was up by 4.9 percentage points to 73.1%, with departure punctuality improving by 4.1 percentage points to 66.3%; these were similar to the levels of 2019.
- The network continued to be impacted by convective weather on the south-east axis throughout the week; overall performance was a slightly better than the equivalent week in 2023. The comparison is nevertheless distorted as French ATC industrial action affected the network in 2023.
- Regarding airports, Lisbon continued to suffer from daily ATFM regulations, with weather causing the most disruption on 06, 07, 08 and 09 June. Barcelona saw significant disruption as it was affected by thunderstorms on 09 June. There were also daily arrival regulations in Athens, with on-time performance at the airport further impacted by en-route regulations in Greece. London Heathrow continued to suffer from daily weather (winds) and aerodrome capacity delays. Many other airports also saw delays due to convective weather.

En-route ATFM delays

Delays per cause (EUROCONTROL Area)

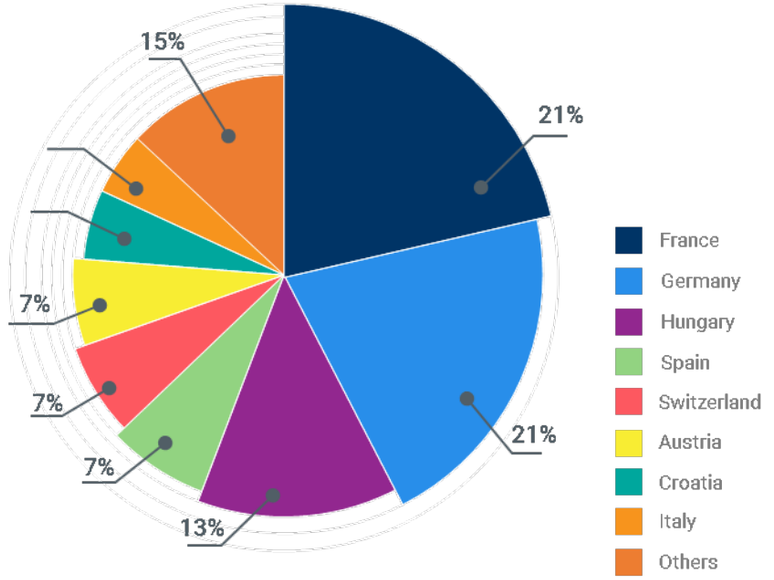
In minutes (total daily and 7-day average) in 2024



- Week 23 (03-09 June) registered fewer en-route delays (-15%) compared to the previous week with an average of 66,800 minutes, equivalent to 2.0 min/flight. En-route ATFM delays were 29% lower than in the equivalent operational week of 2023. But the equivalent week in 2023 was disrupted due to a French ATC industrial action.
- Capacity/staffing was the main cause (45%), **owing mainly to capacity issues in Karlsruhe UAC and Reims ACC.**
- Weather accounted for 42% of en-route delays, especially due to **notable convective weather in Karlsruhe UAC, Vienna and Budapest ACCs, with disruption widespread. The most disrupted day was Sunday.**

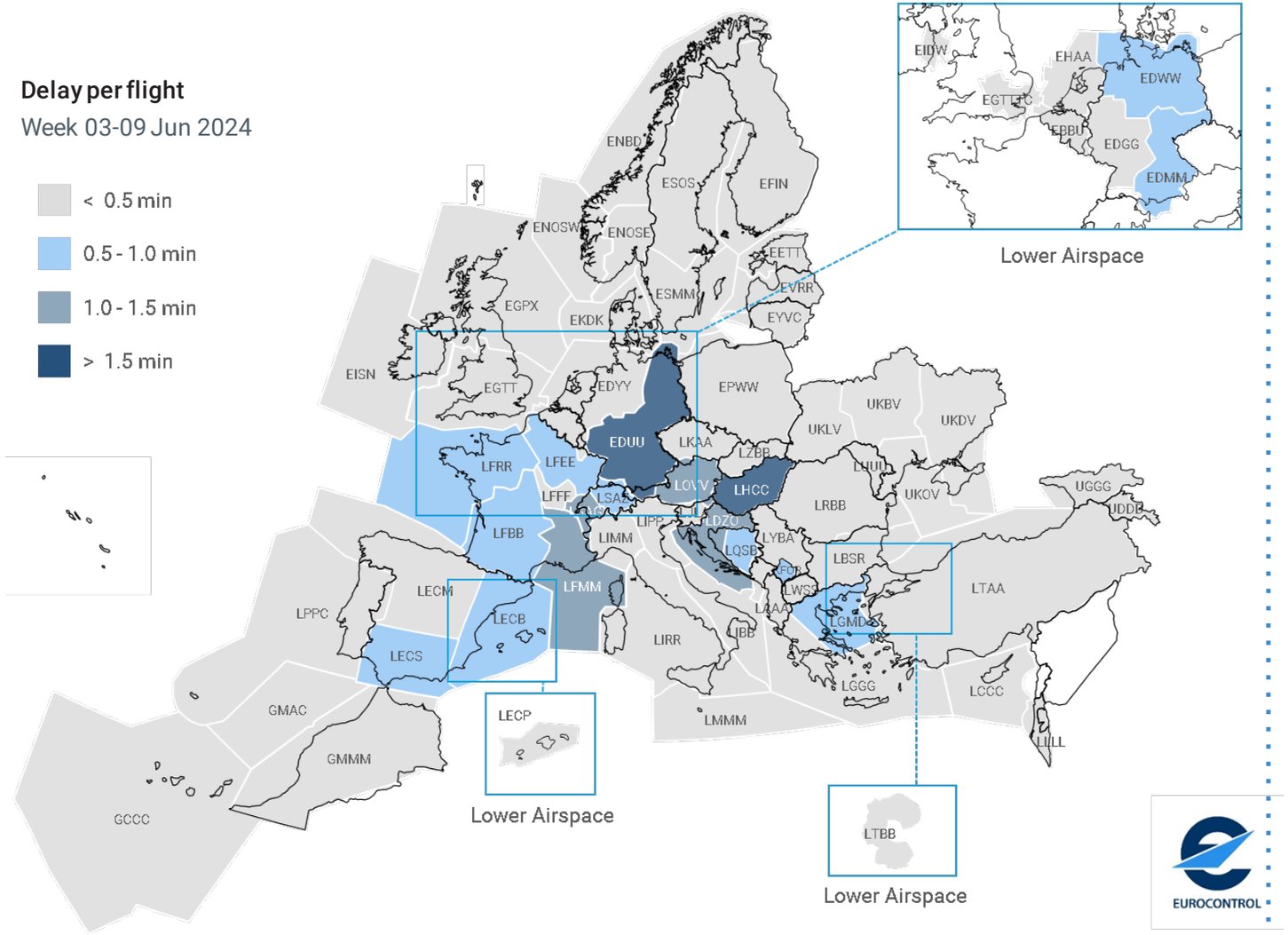
Share of en-route ATFM delays

Week 03-09 Jun 2024



- Germany accounted for 21% of all en-route ATFM delays, with 14pp were attributed to Karlsruhe UAC, 3pp to Munich ACC, 2pp to Langen ACC and rest to Bremen ACC. ATC Capacity accounted for 9.2 pp and 8.1pp attributable to the weather.
- France accounted for 21% of all en-route ATFM delays, with 9pp in Marseille ACC, 6pp in Reims ACC and 3pp in Brest ACC, also due mostly to ATC Capacity and weather.
- Hungary accounted for 13%, with flights demand +29% higher than in 2019 owing to onload from the unavailable L'viv FIR. Moreover, the flow between Moscow and Istanbul is also quite dense and the controllers' workload was complicated by CBs.

En-route ATFM delayed flights per Area Control Centre



- Over Week 23, six ACCs recorded en-route ATFM delays higher than 1.0 min/flight.
- Budapest ACC recorded 2.6 min/flight owing to significant on-load in the East sector from flights avoiding L'viv FIR. The number of flights in the ACC increased by +29% vs 2019, including the notable growth in the flow between Moscow and Istanbul. Convective weather was an issue daily.
- Karlsruhe ACC recorded 1.7 min/flight with en-route ATFM delays shared between weather (0.8) and capacity (0.8); this was distributed amongst sector groups although the largest delays were in the South.
- Marseille ACC recorded 1.3 min/flight due to significant disruption on Sunday, due mainly to convective weather and staffing issues in both East and West sectors.
- Zagreb ACC recorded 1.3 min/flight. The centre recorded a high number of flights (+23% increase on 2019). The en-route ATFM delays were explained by convective weather (0.7 min/flight) complicating traffic management and limiting sector capacity, notably on Monday.

Top 10 States

Departures and arrivals

Week 03-09 Jun 2024

See more

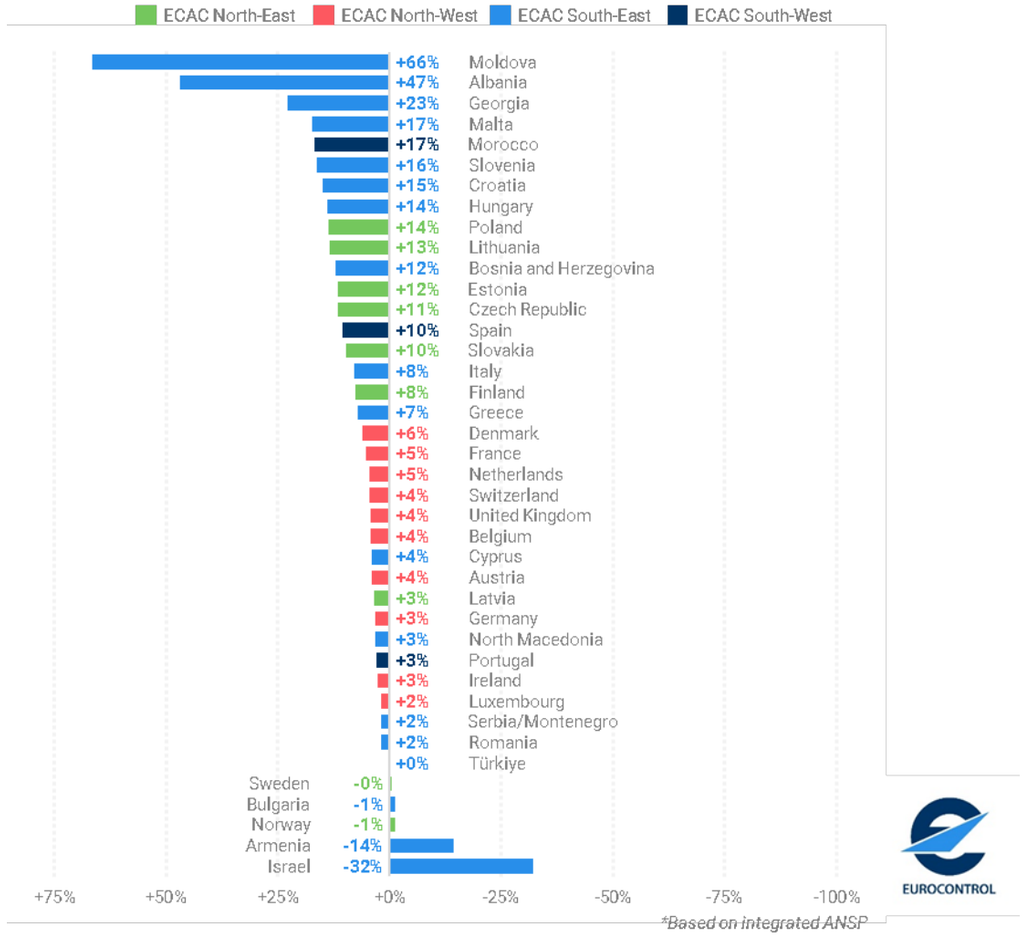
No.	Country	Average daily flights	% prev week	% prev year	% 2019
1.	United Kingdom	6,235	-0%	+4%	-6%
2.	Spain	5,566	-1%	+10%	+5%
3.	Germany	5,356	+1%	+3%	-14%
4.	France	4,730	+0%	+5%	-2%
5.	Italy	4,435	+2%	+8%	+8%
6.	Türkiye	3,613	+2%	+0%	+10%
7.	Greece	2,161	+8%	+7%	+17%
8.	Netherlands	1,717	+0%	+5%	-5%
9.	Norway	1,452	+2%	-1%	-5%
10.	Poland	1,422	+4%	+14%	+14%

- The top 10 States, in aggregate, recorded 1.2% more flights than in the previous week .
- Compared to the previous edition, Poland has entered the top 10, while Switzerland has dropped out.
- All States but two recorded a higher number of flights vs the previous week. Greece recorded the greatest increase (+8%, mainly due to Ryanair and Aegean Group) on domestic flows, and on the flows Greece ↔ Italy or Greece ↔ Israel . Spain posted a 1% decrease (mainly on flows Spain ↔ UK and Spain ↔ Germany).
- Five States in the top 10 are recording traffic at or above 2019 levels (Greece, Poland, Türkiye, Italy and Spain), with the remainder between 2% 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 03-09 Jun 2024



*Based on integrated ANSP

Top 10 aircraft operators

Week 03-09 Jun 2024 (avg daily flights)

No.	Aircraft operator	Average daily flights	% prev week	% prev year	% 2019
1.	Ryanair Group	3,546	+2%	+12%	+36%
2.	easyJet Group	1,807	+2%	+6%	-3%
3.	Turkish Airlines Group	1,519	-0%	-3%	+6%
4.	Lufthansa Airlines	1,247	+0%	+2%	-20%
5.	Air France Group	1,107	+2%	+5%	-14%
6.	KLM Group	919	+0%	+7%	-2%
7.	British Airways Group	871	+1%	+7%	-12%
8.	Wizz Air Group	846	+3%	+1%	+36%
9.	SAS Group	702	-3%	+2%	-20%
10.	Vueling	654	-0%	+13%	-8%

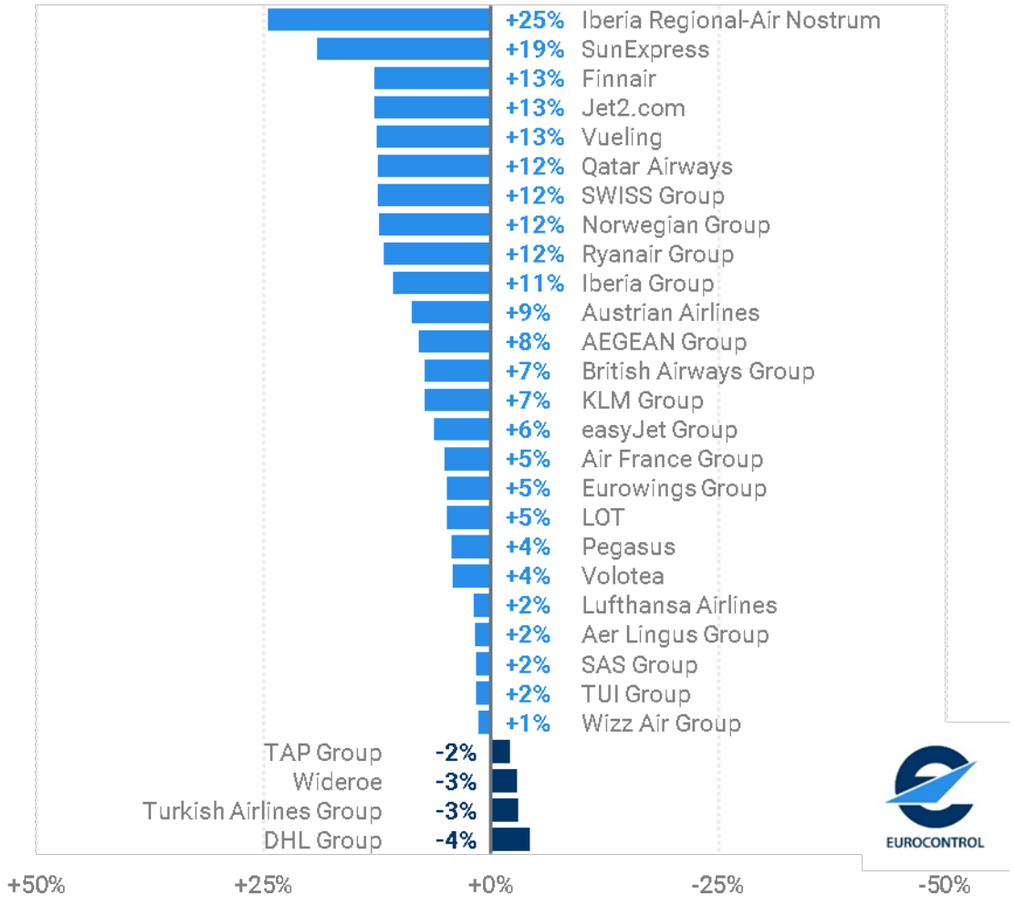
See more

- The top 10 aircraft operators, in aggregate, posted a slight increase (1.2%) in number of flights compared to the previous week.
- The largest increase was for Wizz Air Group (+3%), mainly on flows Albania ↔ Italy, Albania ↔ Poland and Hungary ↔ Italy, Hungary ↔ Spain.
- The largest decrease was recorded by SAS Group (-3%) mostly due to losses on domestic flows in Sweden.
- In Week 23, three top 10 airlines posted flight numbers above 2019 levels: +36% for Ryanair Group, +36% for Wizz Air Group and +6% for Turkish Airlines Group.

Aircraft operators in the EUROCONTROL Network

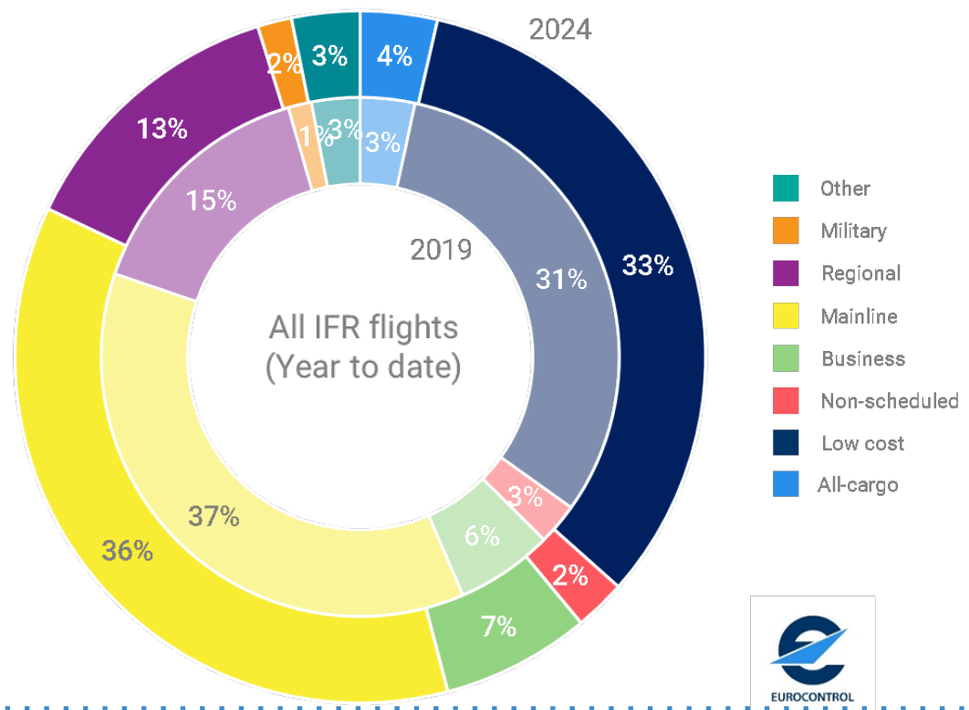
Compared to the equivalent week in 2023

Dep/Arr flights for week 03-09 Jun 2024



Market segments in the EUROCONTROL Network

Average share of total flights (year to date)

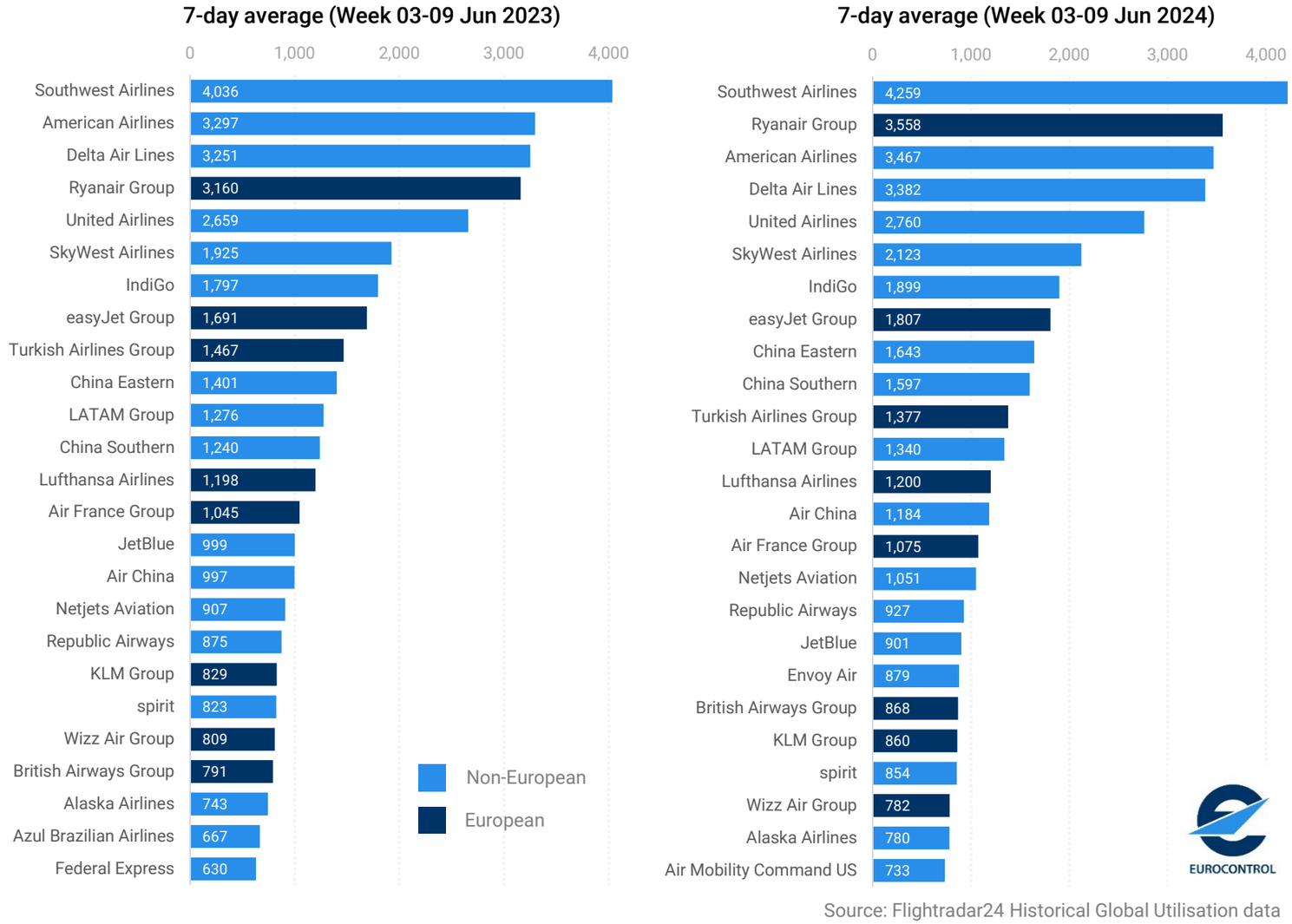


No.	Market segment	Avg. flights	% prev week	% prev year	% 2019
1.	Low Cost	11,500	+2%	+10%	+5%
2.	Mainline	11,306	+2%	+7%	-2%
3.	Regional	4,053	+1%	+4%	-10%
4.	Business	2,424	-5%	-6%	+33%
5.	Non-Scheduled	1,194	+8%	-1%	-24%
6.	Other	1,031	+4%	+0%	+7%
7.	All-cargo	1,000	-1%	-1%	+18%
8.	Military	519	+3%	+9%	+5%

- Year-to-date (graph on left), the largest market segment (Mainline) has a 36% share, slightly less than in the same period in 2019. The second largest segment (Low Cost) is at 33%, up by 2pp compared to 2019 (same period). The Regional market share, however, has shrunk by 2pp to 13%, while the All-cargo market share has slightly increased by 1pp to 4%.
- For 3-9 June (compared to 2023), passenger flight numbers have recorded strong growth rates: Low Cost (+10%), Mainline (+7%) and Regional (+4%). All-cargo is down (-1%) with fewer flights on domestic flows in Sweden and in Spain when compared to 2023 levels.
- Five market segments are recording flights above 2019 levels. The non-scheduled market segment has seen a notable decline vs 2019 (-24%) due to the war in Ukraine (notably on flows Russia ↔ Türkiye and Egypt ↔ Ukraine). The Regional market segment has declined by 10% compared to 2019, reflecting decreased domestic flows in Sweden, UK and Germany.

Top 25 global aircraft operators

(average daily departure flights)

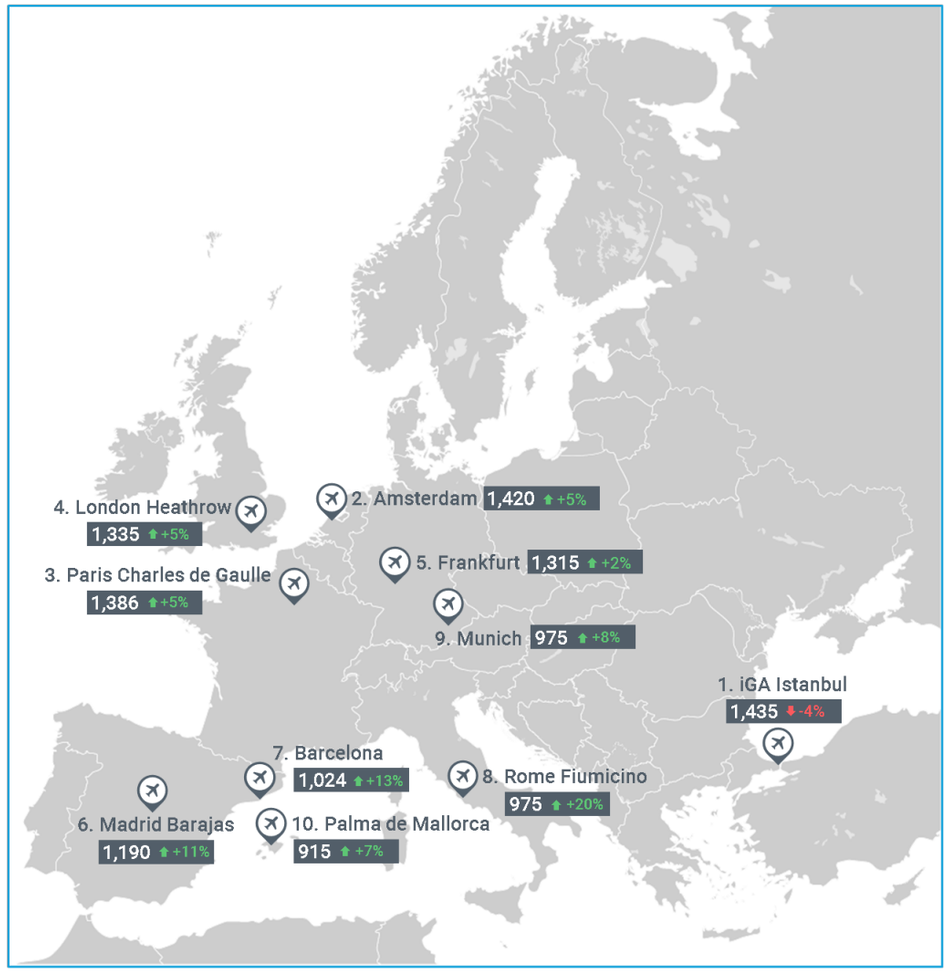


Source: Flightradar24 Historical Global Utilisation data

Over the last week:

- Eight European airlines are ranked in the top 25 global aircraft operators (same as in 2023).
- Ryanair, the busiest European aircraft operating group, is currently 2nd, one place up compared to two weeks ago and two places up on the same week last year.
- Seven more European carriers make the top 25: easyJet Group (8th), Turkish Airlines (11th), Lufthansa (13th), Air France Group (15th), British Airways (20th), KLM Group (21st) and Wizz Air Group (23rd).

Top 10 airports



Airport ranking

Week 03-09 Jun 2024

See more

No.	Airport	Avg. daily dep/arr flights	% prev week	% prev year	% 2019
1.	iGA Istanbul	1,435	-1%	-4%	+17%
2.	Amsterdam	1,420	-0%	+5%	-5%
3.	Paris Charles de Gaulle	1,386	+3%	+5%	-5%
4.	London Heathrow	1,335	+0%	+5%	-2%
5.	Frankfurt	1,315	+1%	+2%	-13%
6.	Madrid Barajas	1,190	-2%	+11%	-3%
7.	Barcelona	1,024	-1%	+13%	-3%
8.	Rome Fiumicino	975	+3%	+20%	+4%
9.	Munich	975	+1%	+8%	-21%
10.	Palma de Mallorca	915	-1%	+7%	+9%

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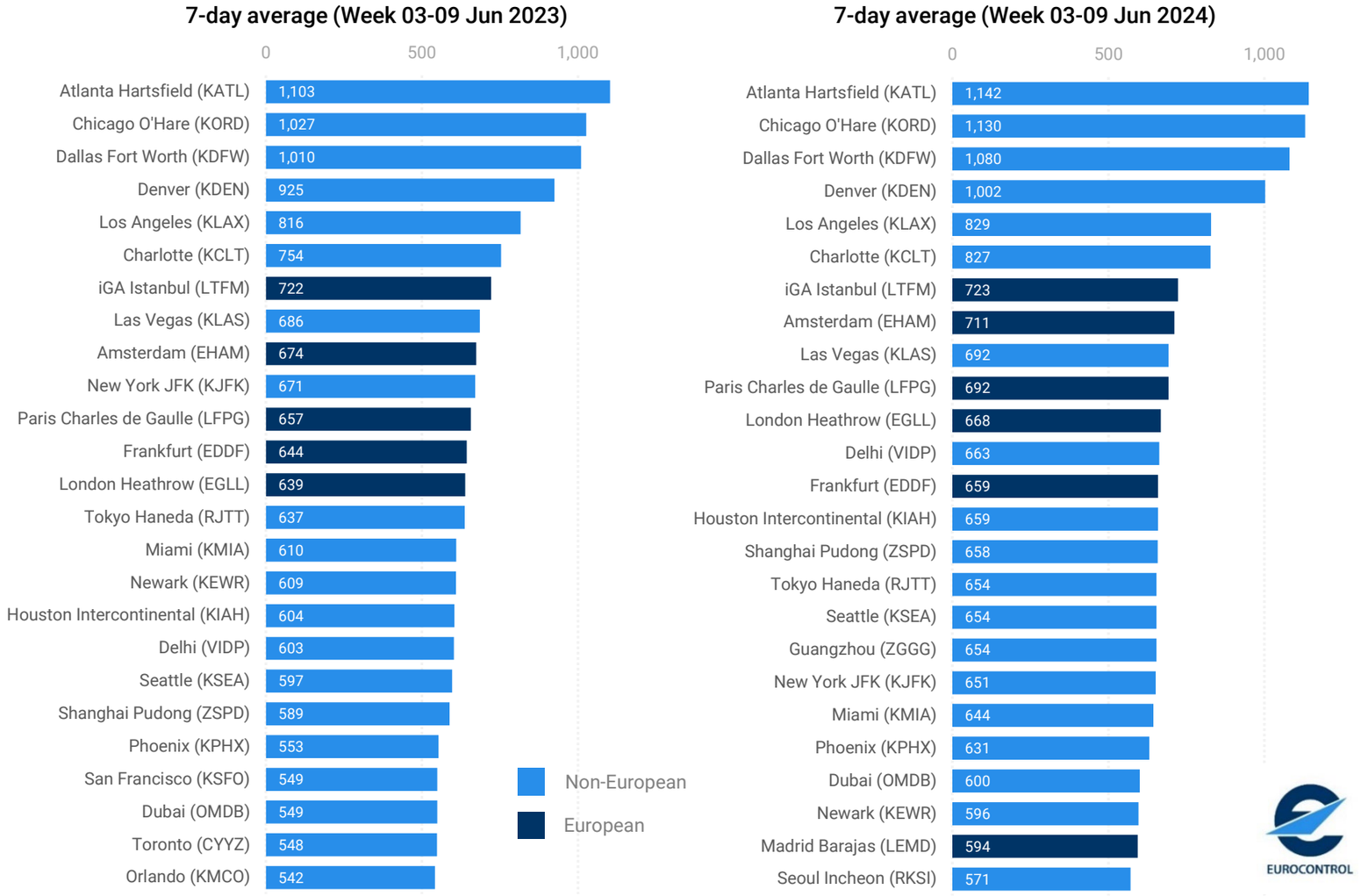
- Some small changes in the ranking compared to the previous edition saw Munich and Rome swap places.
- iGA Istanbul (1,435 flights per day, -1% vs the previous week) remains the busiest airport followed by Amsterdam (1,420, 0%) and Paris CDG (1,386, +3%).
- Convective weather in Europe affected several airports (Barcelona, Geneva and Vienna,…).
- All top airports are handling more flights than in 2023, except iGA Istanbul, with increases ranging from +2% (Frankfurt) to +20% (Rome Fiumicino).
- Three of the top 10 airports (iGA Istanbul, 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

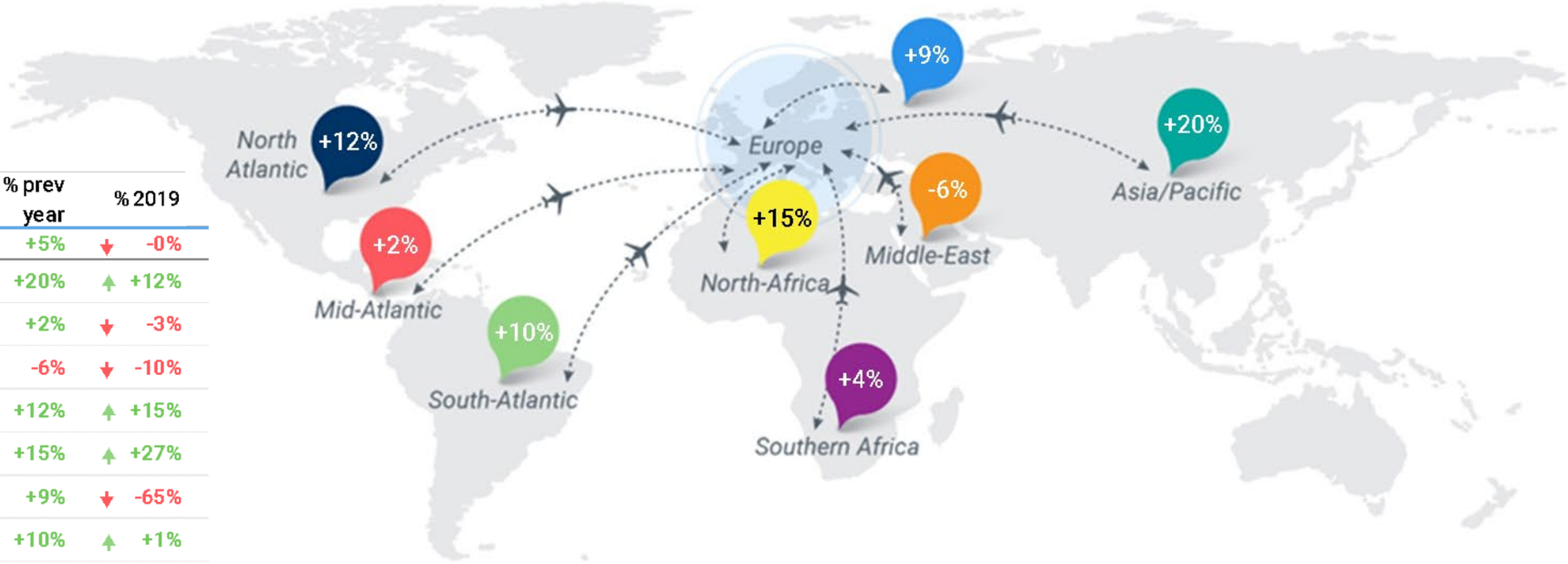
Over the last week:

- Six European airports appear in the top 25 of global airport departures (one more—Madrid--than in the equivalent week of 2023).
- There are three European airports in the top 10 with iGA Istanbul (7th), followed by Amsterdam (8th) and Paris CDG (10th).
- The three other European airports in the top 25 are London Heathrow (11th), Frankfurt (13th) and Madrid Barajas (24th).
- Last year, Tokyo and Shanghai were the only Asian airports (14th and 20th) in the top 25, whereas this year the top 25 features four Asian airports (Shanghai 15th, Tokyo Haneda 16th, Guangzhou 18th and Seoul Incheon 25th).

Traffic flows

(average daily departure/arrival flights for week 03-09 Jun 2024)

Region	Average daily flights	% prev week	% prev year	% 2019
Intra-Europe	25,939	+1%	+5%	-0%
Europe ↔ Asia/Pacific	889	+2%	+20%	+12%
Europe ↔ Mid-Atlantic	152	+0%	+2%	-3%
Europe ↔ Middle-East	1,389	+6%	-6%	-10%
Europe ↔ North Atlantic	1,622	+4%	+12%	+15%
Europe ↔ North-Africa	1,250	+3%	+15%	+27%
Europe ↔ Other Europe	476	+6%	+9%	-65%
Europe ↔ South-Atlantic	187	-2%	+10%	+1%
Europe ↔ Southern Africa	280	+3%	+4%	-1%
Non Intra-Europe	6,245	+4%	+8%	-7%



- The main traffic flow - intra-European - recorded 25,939 daily flights last week, 1% higher than the previous week. Intercontinental flows amounted to 6,245 daily flights on average, a 4% increase vs the previous week.
- The second-largest flow is to/from North America, with 1,622 flights per day, a 4% increase compared to the previous week.
- The third-largest regional flow is between Europe and the Middle East with 1,389 average daily flights, a 6% increase compared to the previous week (increases on flows with Saudi Arabia and with Qatar).
- The fourth flow is to/from North Africa, where the 1,250 daily flights reflect a 3% increase on the previous week.
- Flows with 'Other Europe' (including the Russian Federation) remain massively reduced at -65% compared to 2019.
- Flows between Europe and the Asia/Pacific region are 20% above the same week in 2023 and 12% above 2019 levels (owing to growth in Kazakhstan, Uzbekistan and China).

Top 10 long-haul country pairs

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

Week 03-09 Jun 2024

No.	Country pair	Average daily flights	% prev week	% prev year	% 2019
1.	UK ↔ US	338	+2%	+2%	+1%
2.	Germany ↔ US	181	+8%	+1%	+4%
3.	France ↔ US	171	+12%	+18%	+28%
4.	Italy ↔ US	108	+3%	+17%	+25%
5.	Spain ↔ US	86	+4%	+22%	+9%
6.	Netherlands ↔ US	83	-1%	+6%	-5%
7.	Ireland ↔ US	78	-1%	+3%	+9%
8.	UAE ↔ UK	60	+0%	+7%	-2%
9.	Iceland ↔ US	52	-2%	n.a	n.a
10.	Switzerland ↔ US	50	+7%	+14%	+19%

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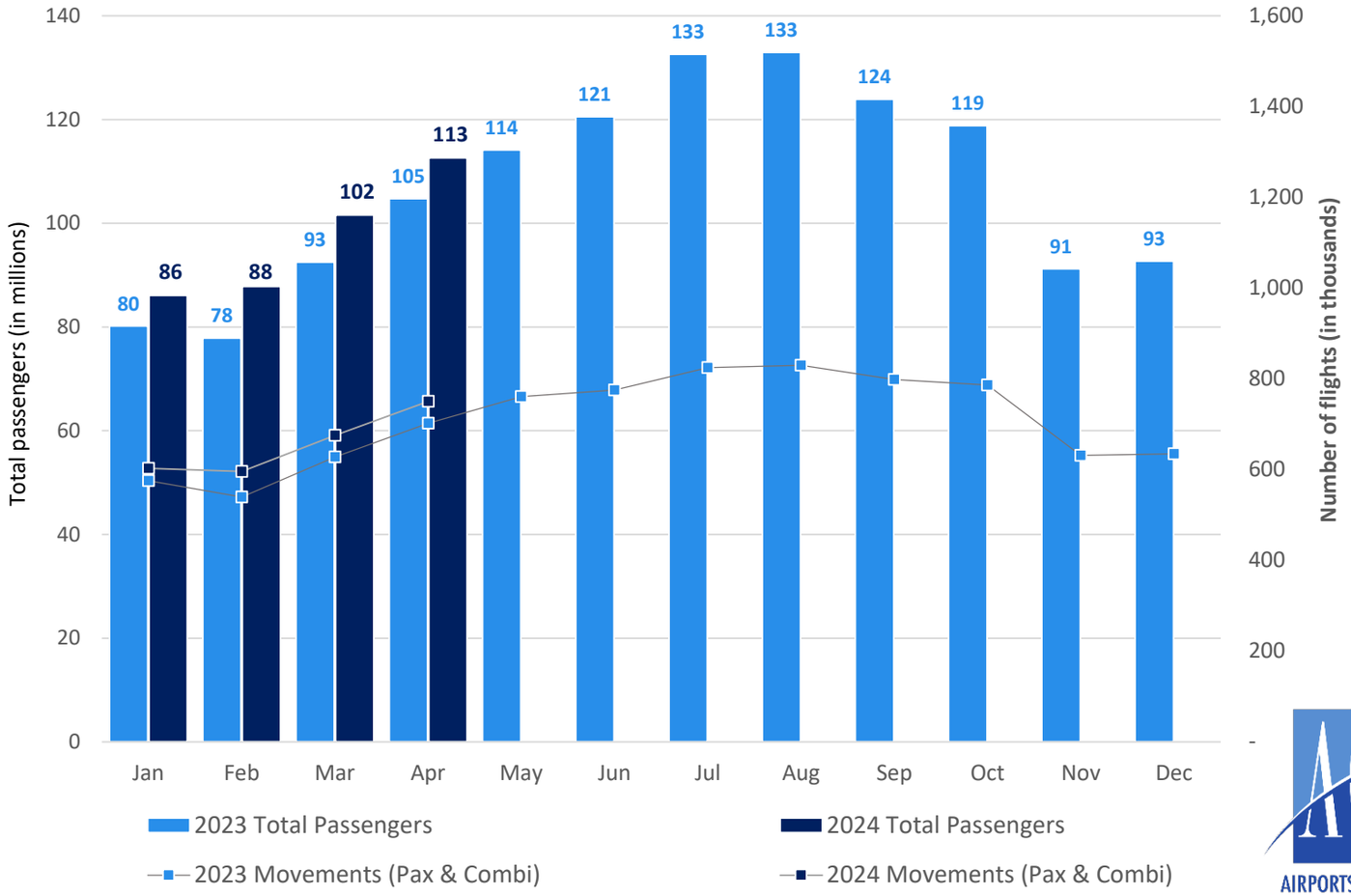
- Nine of the top 10 long-haul country pairs are with the United States, the main three being between the US and the UK, Germany & France. One new flow is between Iceland and the US. The only non-US related long-haul flow within the top 10 is between the United Arab Emirates and the UK.
- All but three long-haul flows posted increases on the previous week, with the largest increase in the France ↔ US flow (+12%), owing to additional business jets flights related to the D-Day commemorations.
- Three flows: Netherlands ↔ US, Ireland ↔ US, and Iceland ↔ US posted a decrease vs the previous week.
- Seven flows are currently at or above 2019 levels.

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 113 million in April 2024, 8% more than in April 2023, with a total of 750 thousand flights in the same period, a 7% increase on April 2023.
- The respective recovery rates on 2019 levels for April 2024 were 99% in passenger numbers, and 95% in terms of flights.
- Some aircraft operators are operating above their 2019 levels in terms of seats, mainly thanks to new aircraft models (e.g. NEOs).

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

AIRPORTS COUNCIL INTERNATIONAL

Economics

Week 03-09 Jun 2024

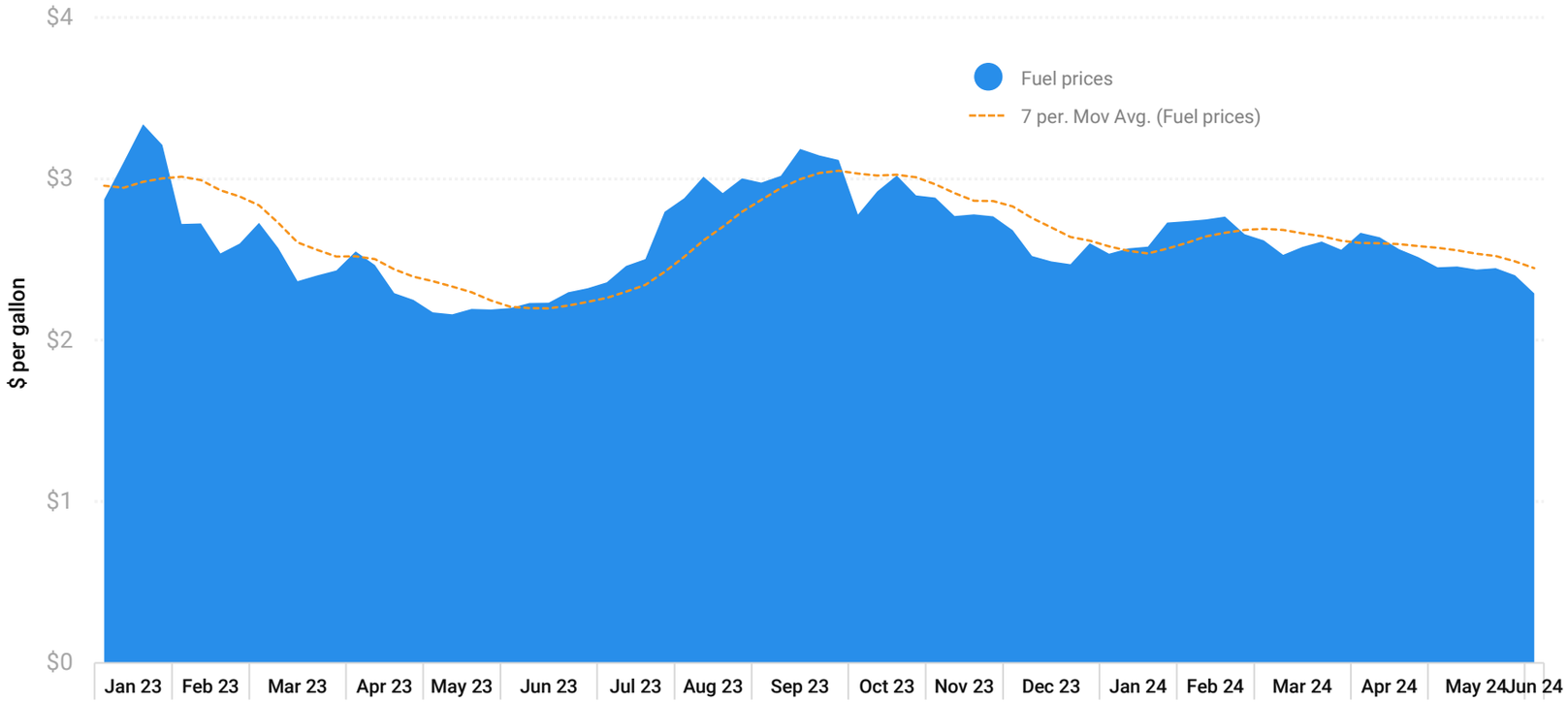
07 Jun 2024
avg fuel price:

$2.29 /gallon

-6%
vs. $2.45 /gallon
on 24 May 2024

Source: IATA/Platts

Jet fuel price (Europe)

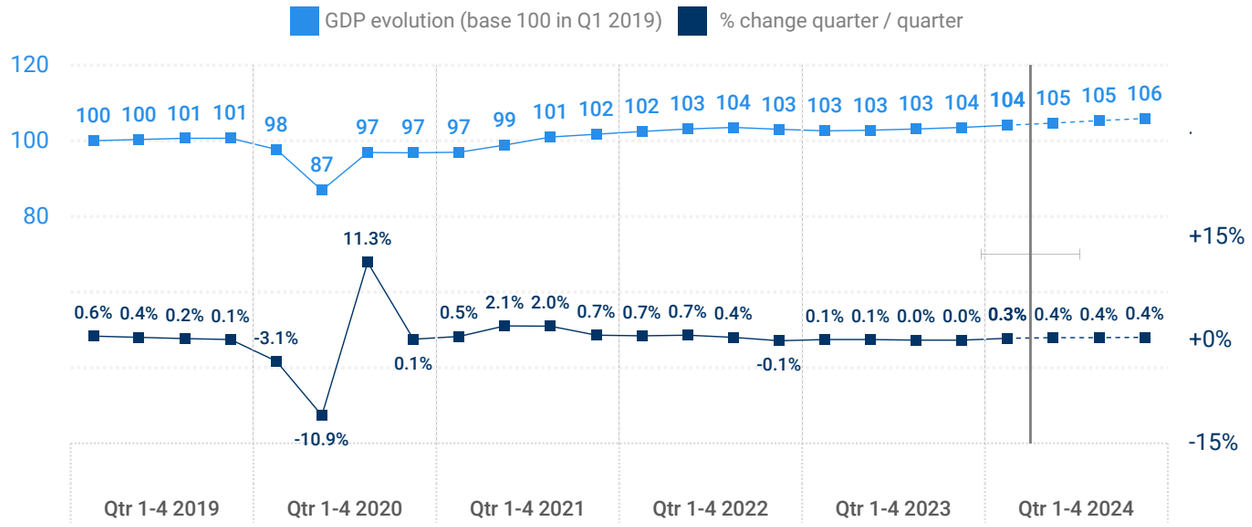


Source: IATA/Platts

- The average price of jet fuel stood at 2.29 USD/gallon on 07 June 2024, a 6% 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, since the beginning of March 2024, they have been again declining, albeit more slowly.

GDP in the European Union

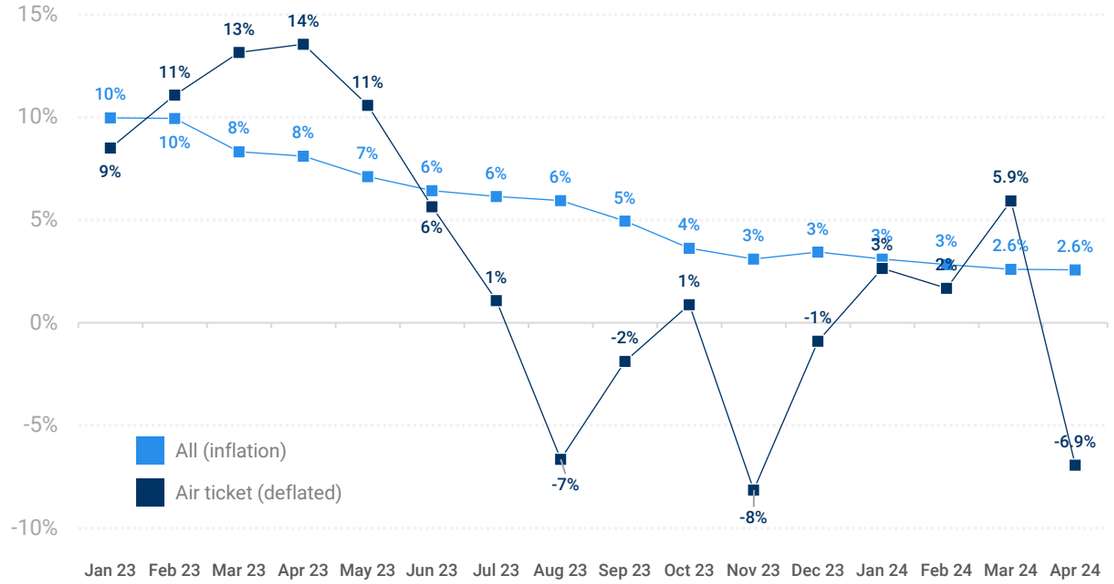
Constant prices and exchange rate, Euro



Source: Oxford Economics Ltd.

Price change per month (EU27)

Values compare to the same month of the previous year



Source: EUROSTAT

The latest information from Oxford Economics Ltd. shows the following:

- According to the latest GDP forecast from Oxford Economics (June 2024), the EU27 economies posted a weak but positive growth during Q1 2024 (+0.3% vs Q1 2023).
- For the second quarter of 2024, the growth is now expected to record +0.4% (vs same quarter in 2023), a 0.1pp upwards revision on last publication. Consequently, the annual GDP growth for the EU27 zone has slightly been revised upwards to +0.9% in 2024 and +1.9% in 2025.

The latest information from EUROSTAT shows the following:

- In April 2024, all-prices inflation posted a 2.6% increase; ticket prices recorded a 7% decrease (excluding inflation).
- All prices inflation rate has stabilized slightly below 3% higher over the first months of the second quarter 2024 (vs the same months in 2023).
- Ticket prices rates in April 2023 were relatively high, as is generally the case over Easter period. In 2024, Easter day took place in March, which shifted earlier the traditional peak on ticket prices.

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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.

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