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AVIATION INTELLIGENCE+

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EUROPEAN AVIATION OVERVIEW

04-10 Nov 2024

Thursday 14 November 2024

Headlines

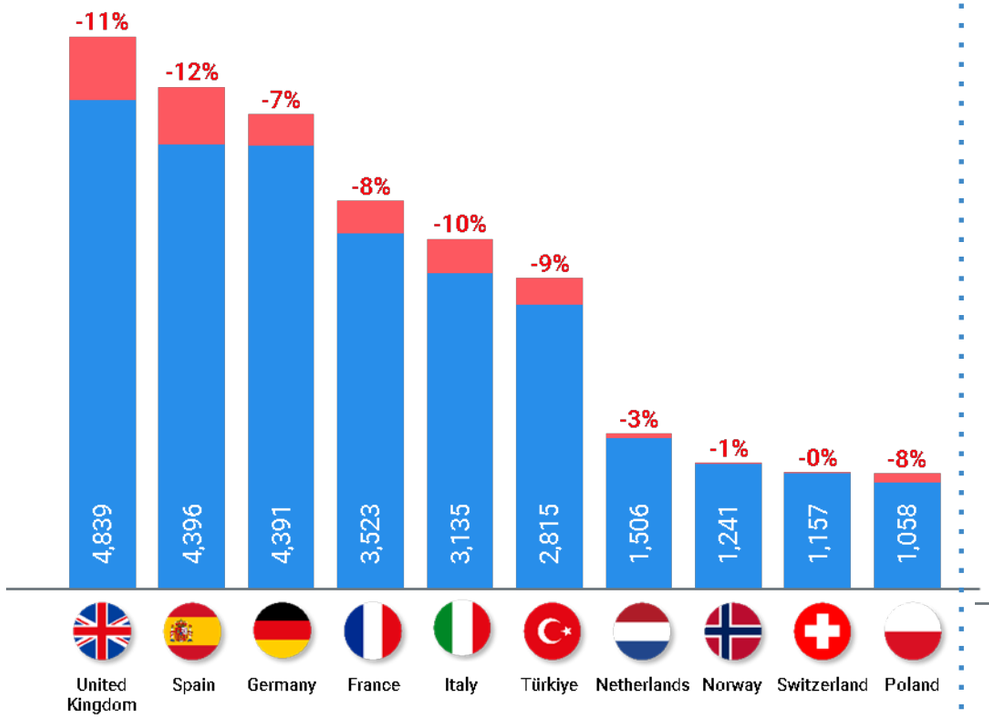
(Week 04-10 Nov 2024)

- For the second week of the Winter schedules, the network recorded 26,254 average daily flights (+5% vs 2023).
- All States within the top 10 have recorded less traffic (-6.2%) compared to the previous week's average.
- Network traffic (flights) for November so far is at 98% of 2019 levels. Locally, the situation is more diverse.
- Year-to-date traffic is 96% of 2019, 5% more than 2023.
- A EUROCONTROL forecast update has been published which expects the number of flights across the Network as a whole to reach 2019 levels during Summer 2025.
- En-route ATFM delays were much lower than in the previous week (-52%), with an average of approximately 16,800 daily minutes. This is 35% higher than in 2023 and represents, on average, 0.64 min/flight.
- ATC capacity/staffing was the top delay cause last week (60% of all en-route ATFM delays).
- The average jet fuel price was at 2.14 USD/gallon on 8 November 2024, a 2% increase over two weeks.
- EUROCONTROL billed 901M€ in October 2024 (8% above October 2023 and 29% above October 2019) reflecting more service units (+4%) and higher unit rates.

Top 10 busiest States

On week 04-10 Nov 2024

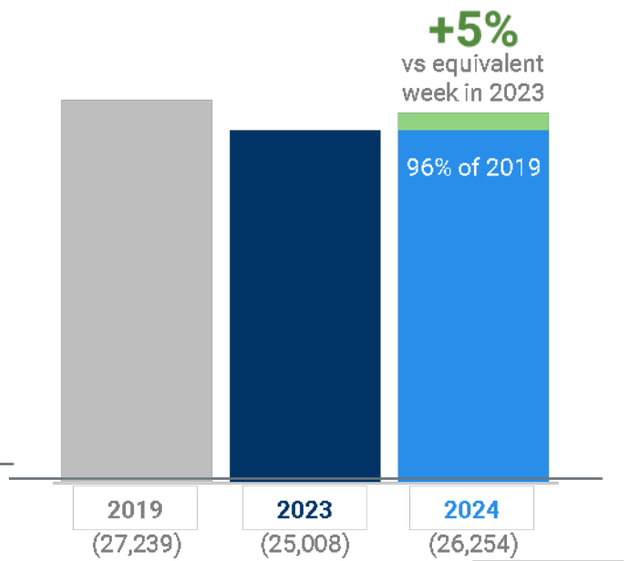
(all flights excl. overflights compared with previous week)



Traffic situation

Average daily flights (including overflights)

Week 04-10 Nov 2024



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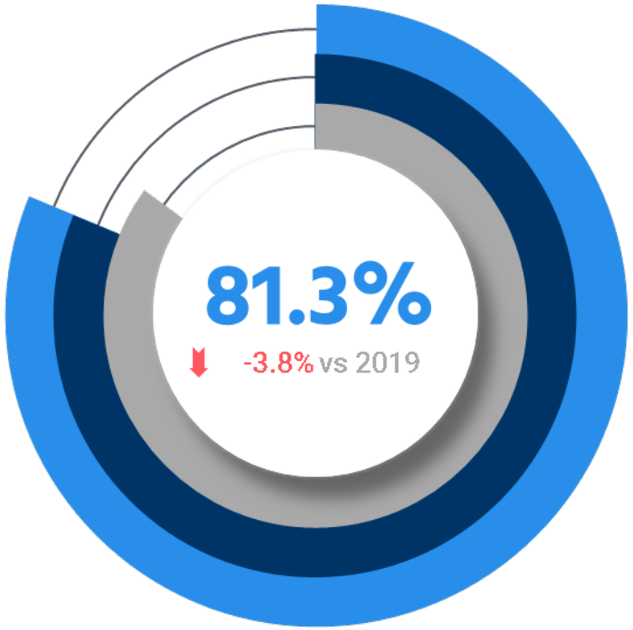
Arrival & departure punctuality

(all network scheduled flights)

Week 04-10 Nov 2024

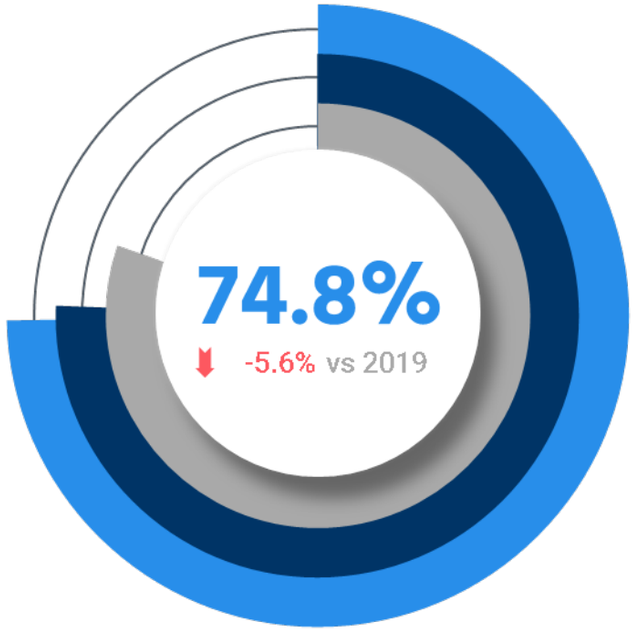
ARRIVAL PUNCTUALITY



85.1% _____ in 2019

81.3% _____ in 2023

DEPARTURE PUNCTUALITY



80.3% _____ in 2019

75.6% _____ in 2023

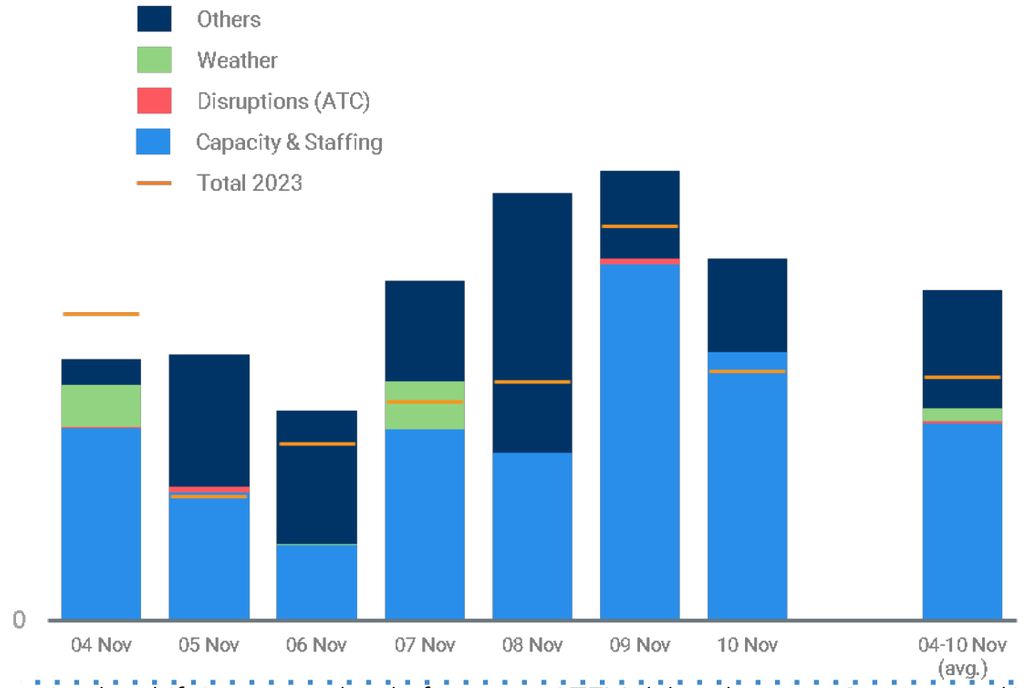
The pictures show the share of flights arriving/departing no later than 15 minutes after/before the scheduled time (OTP15).

- Compared to the equivalent week in 2023, arrival punctuality remained stable at 81.3%, and departure punctuality slightly deteriorated by 0.6 percentage points to 74.8%. Compared to the same week in 2019, both indicators recorded a significant drop.
- Weather remained a key influence for delays during the week. Barcelona was severely affected by heavy rain and airfield flooding on 04 November. Elsewhere, low visibility and seasonal weather affected many airports; Madrid saw high delays for Low Visibility Procedures on 09 November, Lisbon experienced thunderstorm activity on 04 November and low visibility on 06, 07 & 08 November. Milan Malpensa also saw regulations for fog on 04 and 05 November.
- Madrid was disrupted in the evening of 06 November as a result of drone activity, 20 diversions were recorded. Paris airports were affected by 4-Flight implementation in the Paris ACC from 05 November.

En-route ATFM delays

Delays per cause (EUROCONTROL Area)

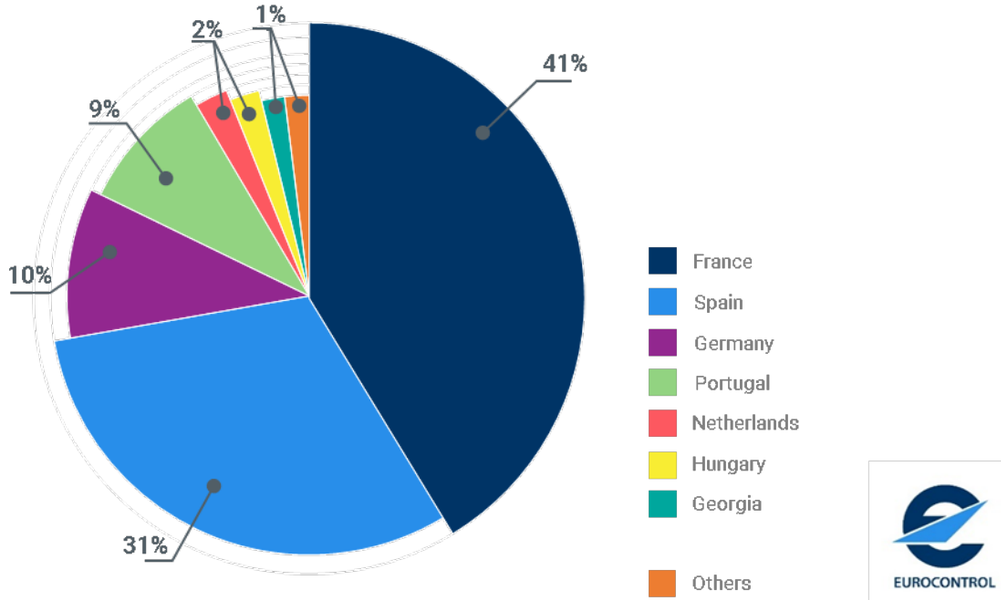
In minutes (total daily and 7-day average) in 2024



- Despite the shift in average level of en-route ATFM delays between Summer and Winter, Week 45 (04 - 10 Nov) registered lower delays than Week 44, with an average of 16,782 daily minutes. However, average level of en-route ATFM delays were 35% higher than the same operational week of 2023.
- ATC capacity/staffing were responsible for 60% of all en-route ATFM delay, led by Sevilla ACC, Lisboa ACC, Madrid ACC and Canaries ACC.
- For the first 10 days of November, en-route ATFM delay was 22% higher than in the same period in 2023.

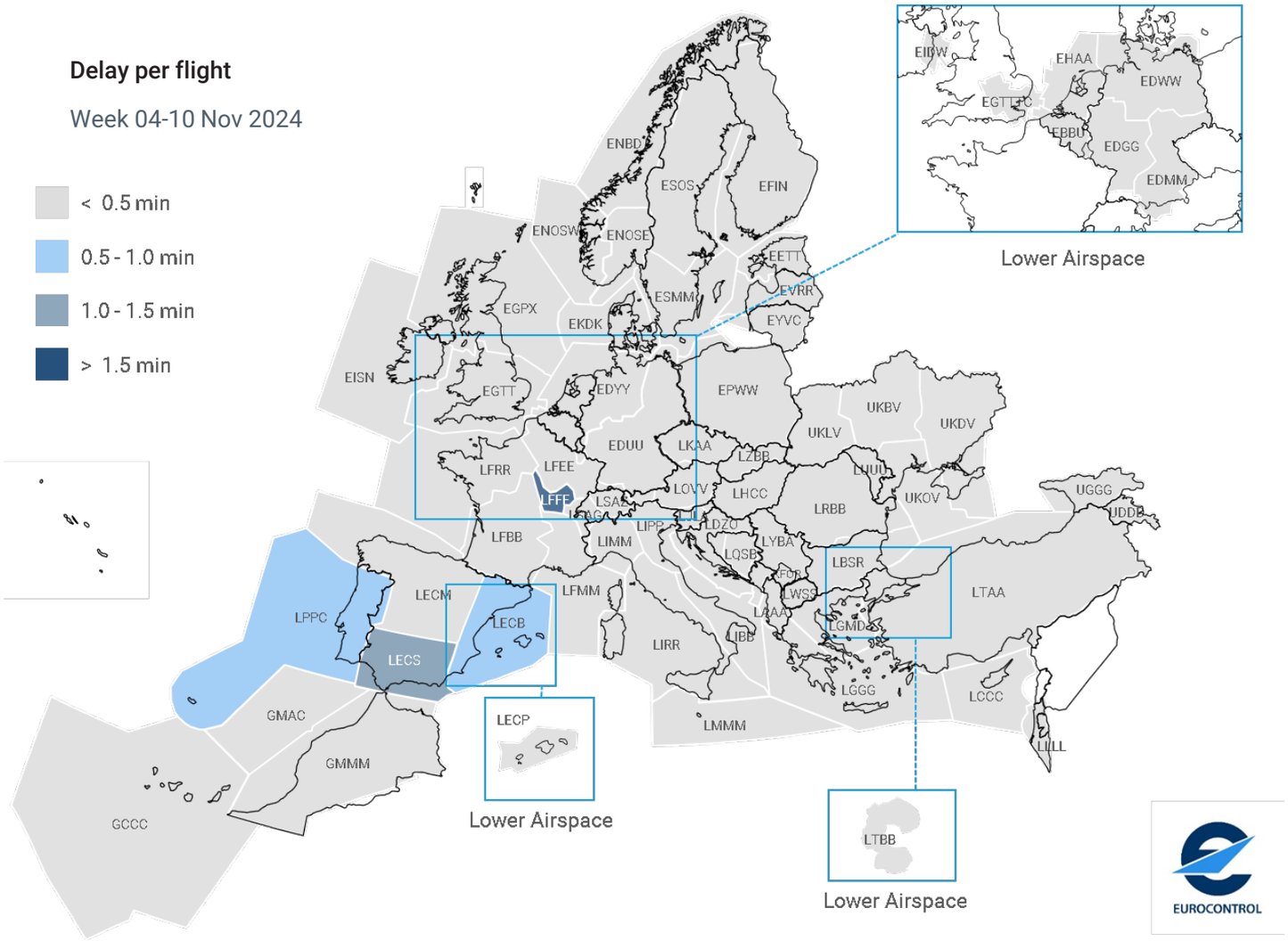
Share of en-route ATFM delays

Week 04-10 Nov 2024



- France accounted for 41% of all en-route ATFM delays, with main reason being the transition to 4-Flight ATM system in Paris ACC.
- Spain accounted for 31% of all en-route ATFM delays, mainly due to weather (mainly in Barcelona ACC) as well as capacity/staffing issues (mainly in Sevilla and Madrid ACCs).
- Germany accounted for 10% of all en-route ATFM delays, mostly due to weather issues affecting Langen ACC.

En-route ATFM delayed flights per Area Control Centre



- In Week 45 (04 - 10 November), two ACCs recorded en-route ATFM delays higher than 1.0 min/flight.
- Paris ACC recorded 1.9 min/flight. Traffic was 8% below 2019 levels and 2% below 2023. Almost all delay caused by Phase-1 of the 4-Flight 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.
- Sevilla ACC recorded 1.3 min/flight. Traffic was +35% above 2019 levels and 11% above 2023. Capacity measures were implemented due to high traffic demand in the South-West axis.
- Lisboa ACC recorded 0.9 min/flight. Traffic was +13% above 2019 levels and +7% above 2023. Delay was mainly due to recurrent capacity issues due to high demand on South-West axis.
- Barcelona ACC recorded 0.6 min/flight. Traffic was +17% above 2019 levels and +9% above 2023. Main ATFM delay cause was due to high demand leading to capacity issues (0.3) plus convective weather on Monday & Thursday affecting sectors over the Balearic Sea (0.3).

Top 10 States

Departures and arrivals

See more

Week 04-10 Nov 2024

No.	Country	Average daily flights	% prev week	% prev year	% 2019
1.	United Kingdom	4,839	-11%	+3%	-6%
2.	Spain	4,396	-12%	+9%	+12%
3.	Germany	4,391	-7%	+2%	-12%
4.	France	3,523	-8%	-2%	-8%
5.	Italy	3,135	-10%	+6%	+1%
6.	Türkiye	2,815	-9%	+10%	+17%
7.	Netherlands	1,506	-3%	+4%	-2%
8.	Norway	1,241	-1%	+0%	-12%
9.	Switzerland	1,157	-0%	+8%	+2%
10.	Poland	1,058	-8%	+5%	+1%

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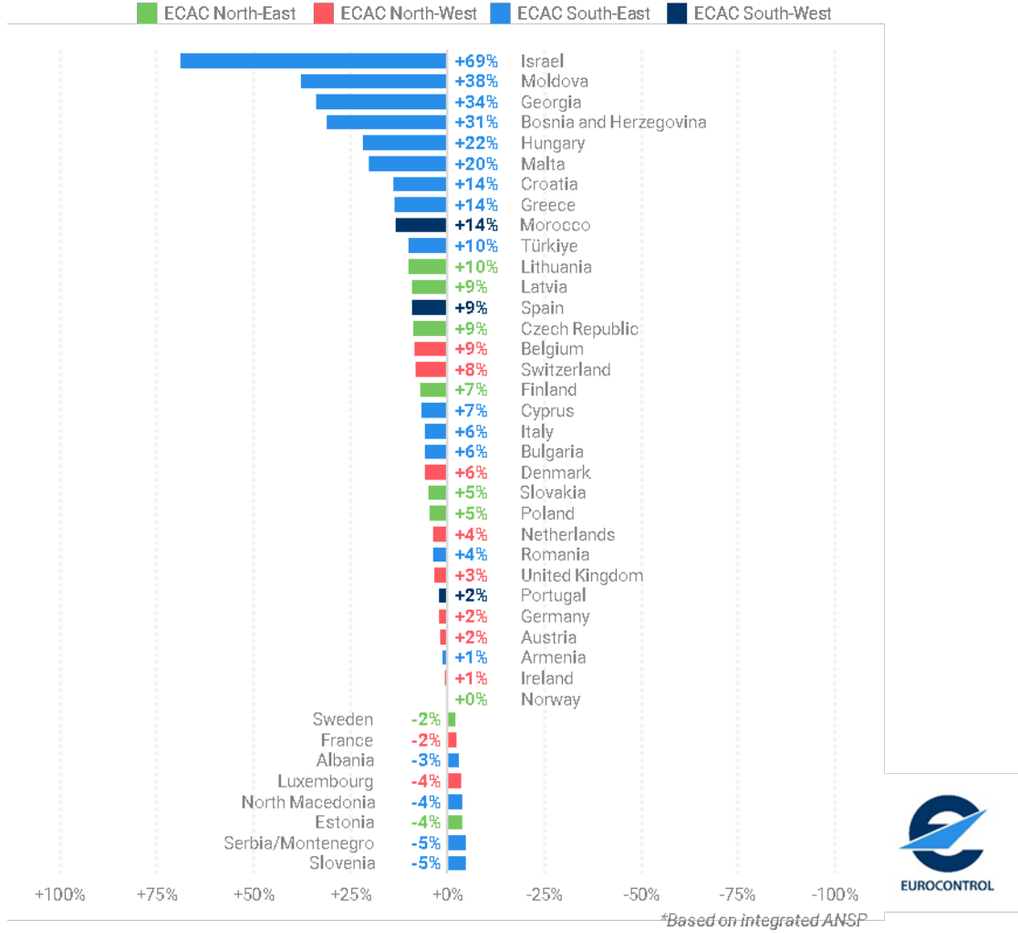
- The top 10 States, in aggregate, recorded 8.4% fewer flights than in the previous week.
- Spain recorded the greatest decrease (-12%, mainly due to Ryanair, easyJet and Jet2.com) on the domestic flow and on the flows Spain ↔ UK, Spain ↔ Germany and France ↔ Spain.
- Five States in the top 10 are recording traffic above 2019 levels (Türkiye, Spain, Switzerland, Poland and Italy), with the remainder between 2% and 12% below pre-COVID levels.
- Traffic from/to Israel more than doubled vs the same week in November 2023, as the Israel-Hamas war started end October 2023. This traffic is still circa 40% below 2019 levels.

States in the EUROCONTROL Network

Compared to the equivalent week in 2023

Dep/Arr flights for week 04-10 Nov 2024



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Top 10 aircraft operators

Week 04-10 Nov 2024 (avg daily flights)

See more

No.	Aircraft operator	Average daily flights	% prev week	% prev year	% 2019
1.	Ryanair Group	2,440	-18%	+10%	+15%
2.	Turkish Airlines Group	1,368	+3%	+5%	+9%
3.	easyJet Group	1,267	-22%	+7%	-7%
4.	Lufthansa Airlines	1,098	-0%	-7%	-11%
5.	Air France Group	911	-5%	-2%	-21%
6.	KLM Group	804	-5%	+3%	+5%
7.	British Airways Group	803	-2%	+1%	-7%
8.	Wizz Air Group	790	-3%	-0%	+49%
9.	SAS Group	584	-2%	-3%	-31%
10.	Vueling	543	-4%	+3%	+8%

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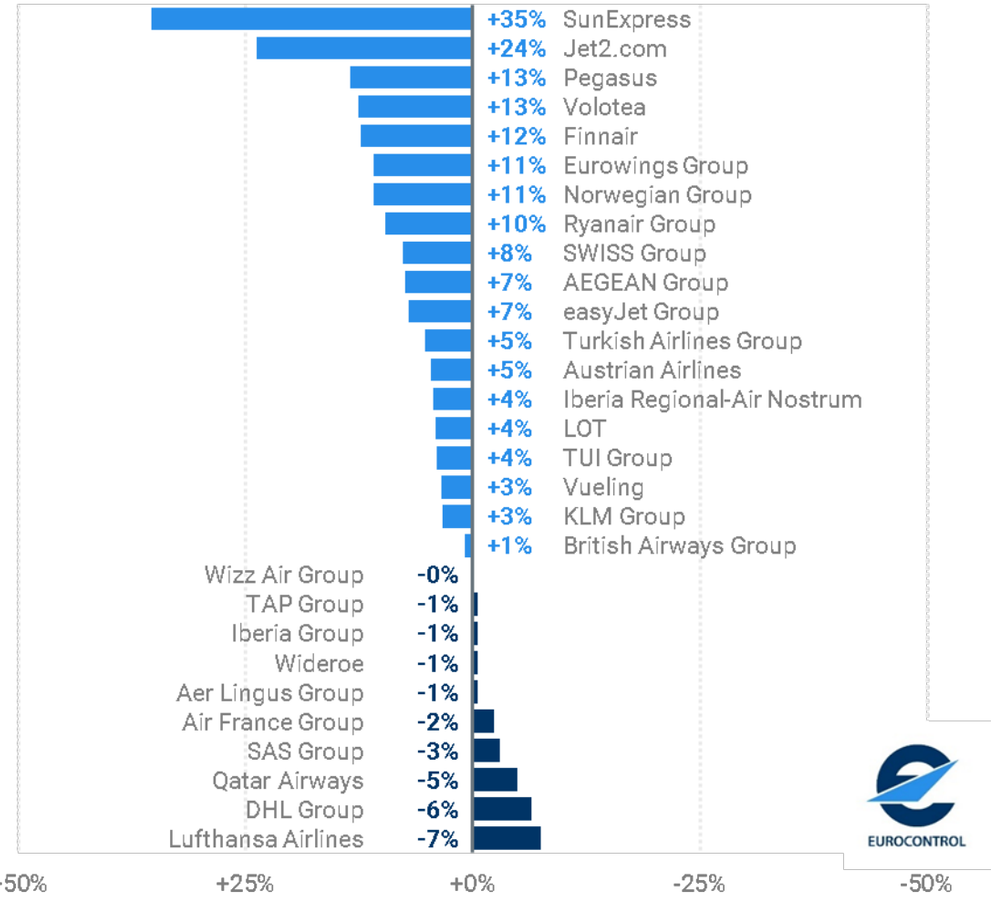
- The top 10 aircraft operators, in aggregate, recorded 8.7% fewer flights than in the previous week, owing to the start of Winter schedules.
- All but one of the top 10 aircraft operators recorded fewer number of flights than during the previous week. Turkish Airlines was the only operator registering growth in this top, mainly due to an increase on domestic flow in Türkiye and on flow Saudi Arabia ↔ Türkiye or Iraq ↔ Türkiye.
- Compared to 2023, all but four airlines are recording more flights.
- Half of the operators in the top 10 recorded traffic above 2019 levels (Wizz Air, Ryanair, Turkish Airlines, Vueling and KLM Group).
- The highest traffic increase vs 2023 is for SunExpress (+35%) while the main decrease is for Lufthansa (-7%).

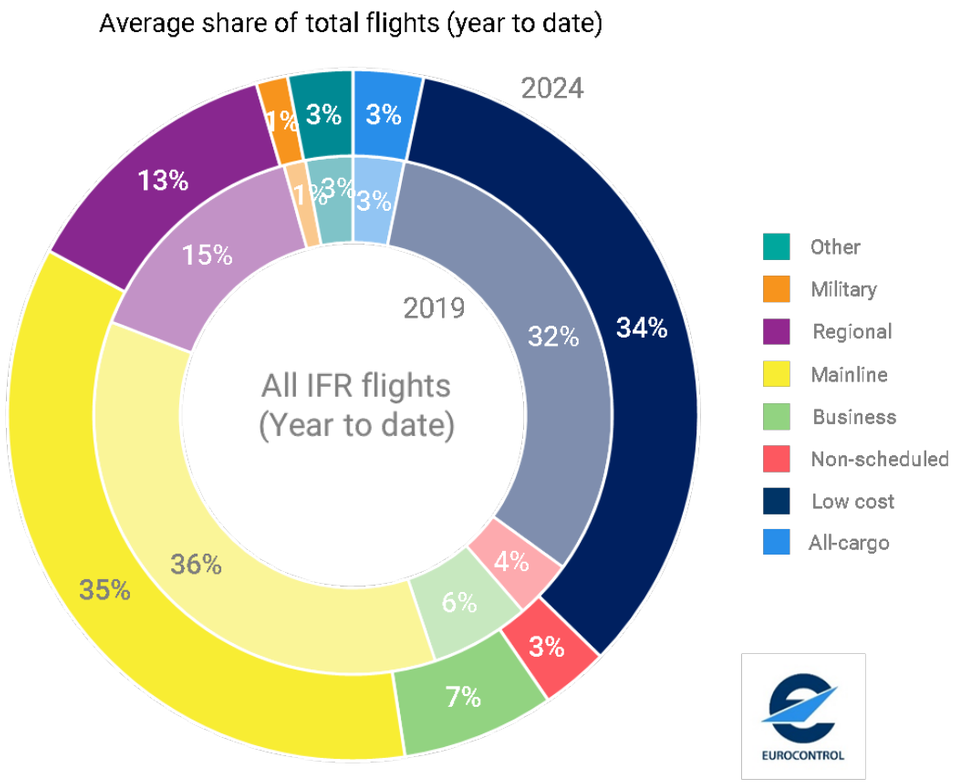
Aircraft operators in the EUROCONTROL Network

Compared to the equivalent week in 2023

Dep/Arr flights for week 04-10 Nov 2024



Market segments in the EUROCONTROL Network

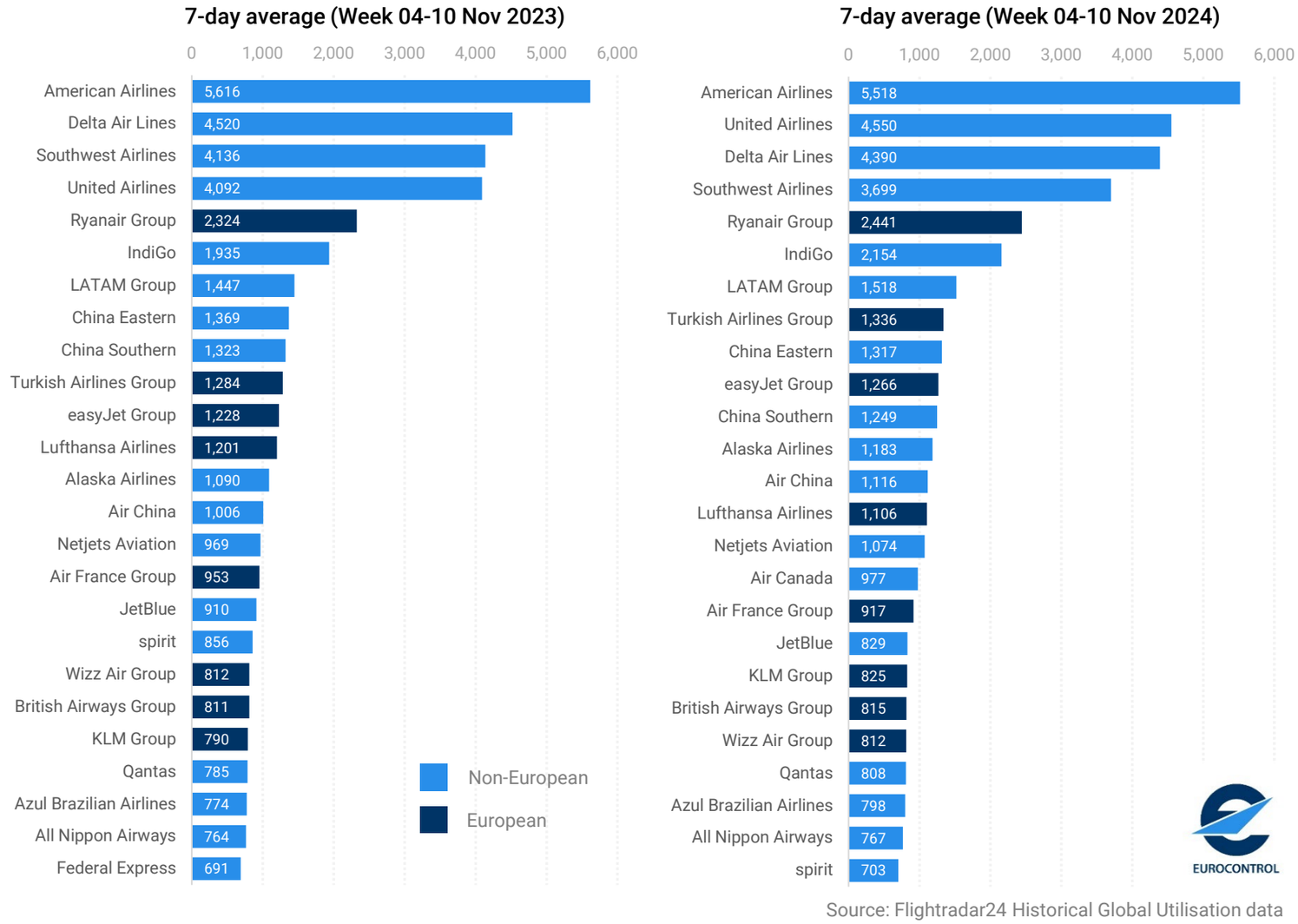


No.	Market segment	Avg. flights	% prev week	% prev year	% 2019
1.	Mainline	9,781	-0%	+5%	-4%
2.	Low Cost	8,222	-16%	+9%	+9%
3.	Regional	3,512	-2%	-2%	-13%
4.	Business	1,690	-2%	-2%	+11%
5.	All-cargo	1,053	+6%	+2%	+8%
6.	Other	928	+6%	+12%	+6%
7.	Non-Scheduled	586	-26%	+14%	-20%
8.	Military	486	+13%	-1%	+10%

- 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 change in season, especially Low Cost (-16%) and Non-Scheduled (-26%). Mainline (-0 %), Regional (-2%), and Business Aviation (-2%) also declined but to a lesser extent.
- Three market segments (excluding Military and Others) are recording flights above 2019 levels: All-cargo (+8%), Business (+11%) and Low Cost (+9%). Mainline was +4% below the 2019 levels while Regional and Non-Scheduled recorded 2-digit decreases (-13% and -20% respectively).

Top 25 global aircraft operators

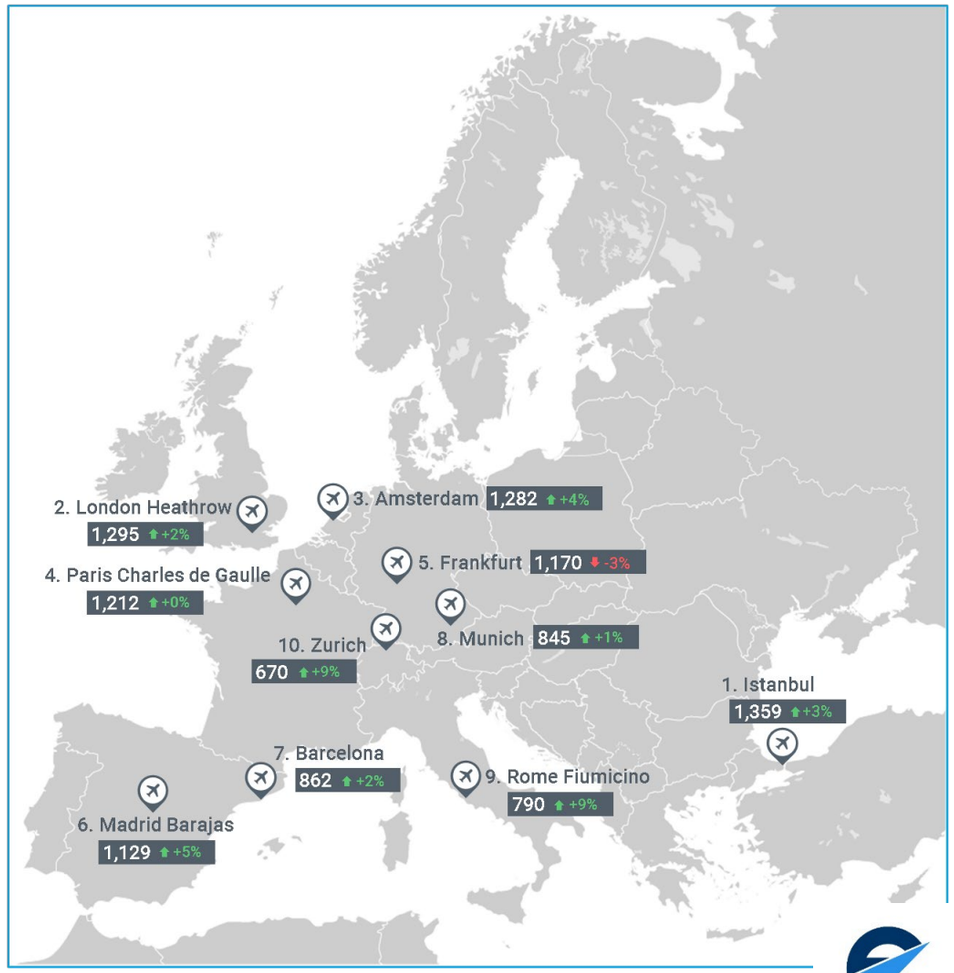
(average daily departure flights)



Source: Flightradar24 Historical Global Utilisation data

- Over the last week, eight European airlines are ranked in the top 25 global aircraft operators.
- Ryanair, the busiest European aircraft operating group, is currently 5th, similar to the same week last year.
- Seven more European carriers make the top 25: Turkish Airlines Group (8th position), easyJet Group (10th), Lufthansa Airlines (14th), Air France Group (17th), KLM Group (19th), British Airways Group (20th) and Wizz Air Group (21st).

Top 10 airports



Airport ranking

Week 04-10 Nov 2024

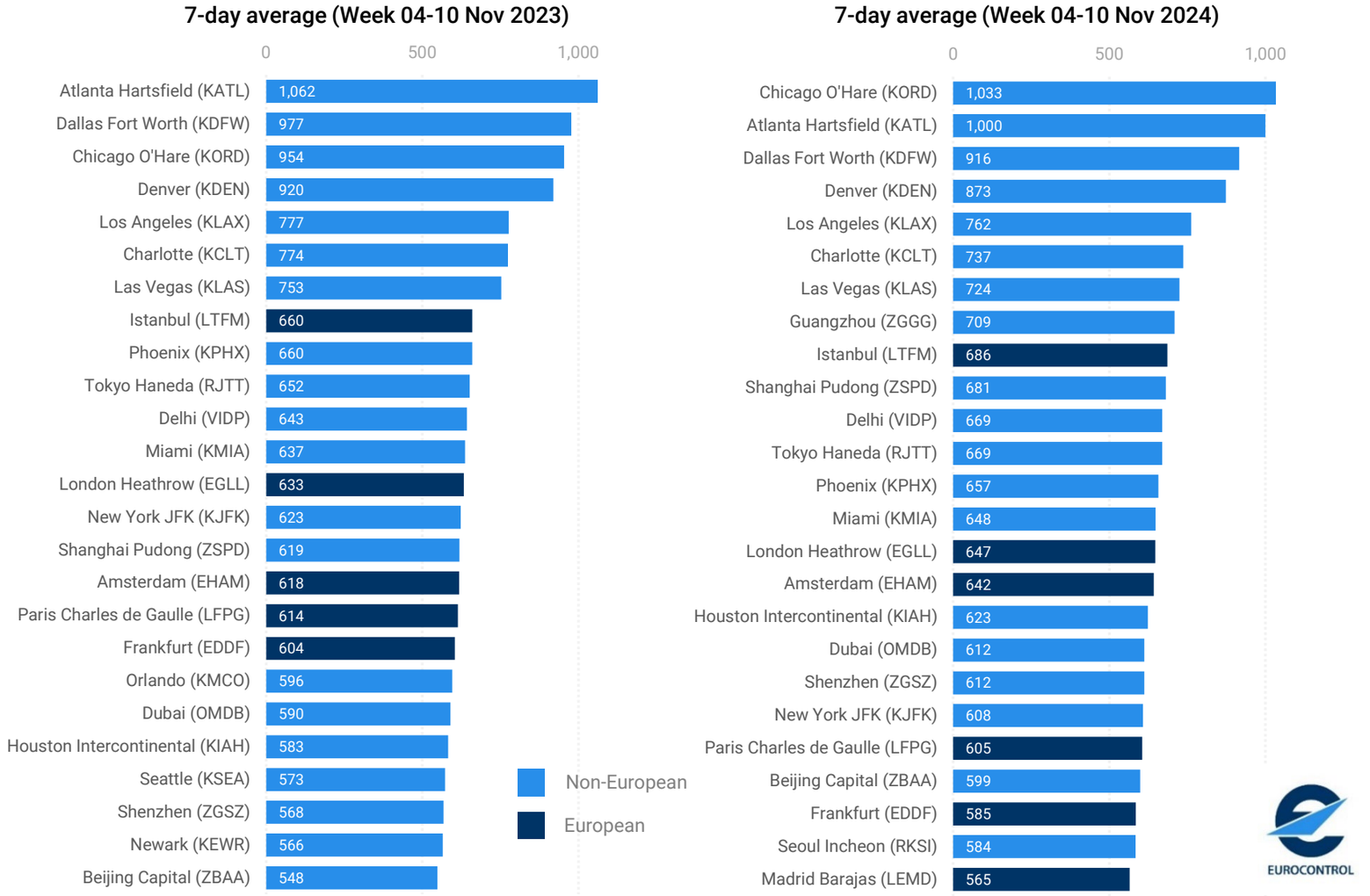
See more

No.	Airport	Avg. daily dep/arr flights	% prev week	% prev year	% 2019
1.	Istanbul	1,359	+3%	+3%	+17%
2.	London Heathrow	1,295	-0%	+2%	+1%
3.	Amsterdam	1,282	-2%	+4%	-2%
4.	Paris Charles de Gaulle	1,212	-5%	+0%	-7%
5.	Frankfurt	1,170	-0%	-3%	-4%
6.	Madrid Barajas	1,129	-0%	+5%	-2%
7.	Barcelona	862	-6%	+2%	+1%
8.	Munich	845	-3%	+1%	-15%
9.	Rome Fiumicino	790	-4%	+9%	+3%
10.	Zurich	670	+1%	+9%	+1%

- Compared to the previous edition, there were some changes in the ranking of the top 4 (which was previously Amsterdam, Istanbul, Paris CDG and London Heathrow). Antalya disappeared from the 10th position and was replaced by Zurich.
- Istanbul (1,359 flights per day, +3% vs previous week) is the busiest airport, followed by London Heathrow (1,295, -0.1%) and Amsterdam (1,282, -2%).
- All but one airport (from the top 10) recorded more flights than in 2023.
- Half of the top 10 airports (Istanbul, Rome, London Heathrow, Barcelona and Zurich) are currently handling traffic above their 2019 levels (respectively +17%, +3% and the rest +1%).

Top 25 global airport departures

(average daily departure flights)



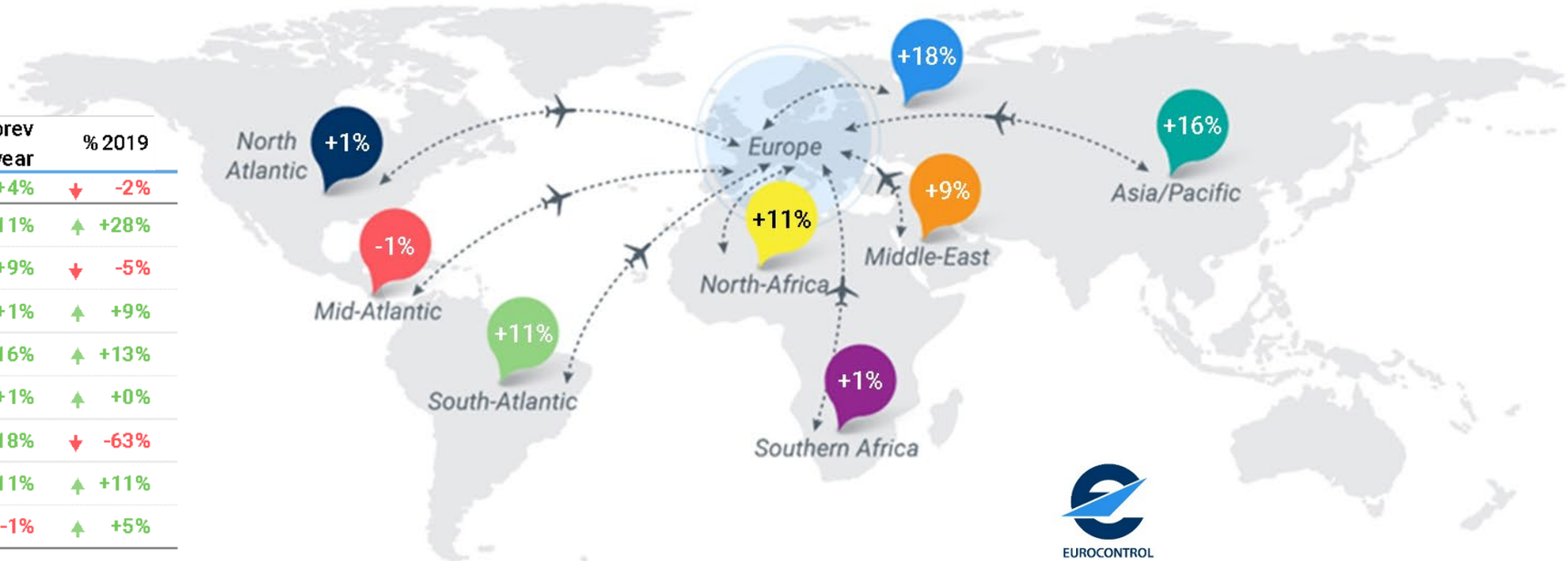
Source: Flightradar24 Historical Global Utilisation data

- Over the last week, six European airports appear in the top 25 of global airport departures (Madrid was not there in 2023).
- There was one European airport in the top 10: Istanbul (9th).
- The other European airports in the top 25 are London Heathrow (15th), Amsterdam (16th), Paris CDG (21st), Frankfurt (22nd) and Madrid (25th).

Traffic flows

(average daily departure/arrival flights for week 04-10 Nov 2024)

Region	Average daily flights	% prev week	% prev year	% 2019
Intra-Europe	19,896	-7%	+4%	-2%
Europe ↔ North-Africa	1,267	-10%	+11%	+28%
Europe ↔ Middle-East	1,266	+2%	+9%	-5%
Europe ↔ North Atlantic	1,107	-2%	+1%	+9%
Europe ↔ Asia/Pacific	901	+1%	+16%	+13%
Europe ↔ Southern Africa	329	+2%	+1%	+0%
Europe ↔ Other Europe	322	-8%	+18%	-63%
Europe ↔ South-Atlantic	199	+0%	+11%	+11%
Europe ↔ Mid-Atlantic	179	+1%	-1%	+5%
Non Intra-Europe	5,570	-2.5%	+8%	-2%



- The main traffic flow - intra-European - recorded 19,896 daily flights last week, 7% fewer than the previous week. Intercontinental flows amounted to 5,570 daily flights on average, below (-2.5%) the previous week.
- The second-largest flow is with North-Africa, with 1,267 flights per day (-10% compared to the previous week owing to decreases on flows France ↔ Morocco, Czechia ↔ Egypt, France ↔ Tunisia, Germany ↔ Egypt). The flow is recording traffic 11% above the same week in 2023 and 28% above 2019 levels.
- The third-largest flow is with Middle-East, with 1,266 average daily flights (+2% increase compared to the previous week, owing mainly to increases on Saudi Arabia ↔ Türkiye).
- The fourth largest flow is with the North-Atlantic, with 1,107 daily flights (-2% compared to the previous week, owing to decreases on Germany ↔ US, UK ↔ US and Italy ↔ US).
- Flow between Europe and the Asia/Pacific region (901 flights per day, +1% on previous week) is recording traffic 16% above the same week in 2023 and 13% above 2019 levels.
- Flows with 'Other Europe' (including the Russian Federation) remain massively reduced at -63% compared to 2019.

Top 10 long-haul country pairs

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

Week 04-10 Nov 2024

No.	Country pair	Average daily flights	% prev week	% prev year	% 2019
1.	UK ↔ US	268	-2%	-4%	-5%
2.	Germany ↔ US	146	-4%	-10%	+2%
3.	France ↔ US	104	-2%	-5%	+6%
4.	Netherlands ↔ US	67	+0%	-2%	-2%
5.	UAE ↔ UK	64	+1%	+1%	-4%
6.	Spain ↔ US	58	-1%	-1%	+12%
7.	Ireland ↔ US	50	-2%	-5%	+3%
8.	Russia ↔ UAE	48	-1%	+7%	+894%
9.	Italy ↔ US	48	-6%	-2%	+15%
10.	India ↔ UK	47	+3%	+12%	+56%

- 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 India ↔ UK.
- Only three long-haul flows posted increases in number on the previous week:, India ↔ UK (+3%), UAE ↔ UK (+1%) and Netherlands ↔ US (+0.4%).
- All but three of the top long-haul flows recorded lower growth vs 2023, notably Germany ↔ US (-10%), France ↔ US (-5%) and Ireland ↔ US (-5%).
- Seven flows are currently above 2019 levels, notably Russia ↔ UAE (+894%), India ↔ UK (+56%) and Spain ↔US (+12%).

Economics

Week 04-10 Nov 2024

08 Nov 2024
avg fuel price:

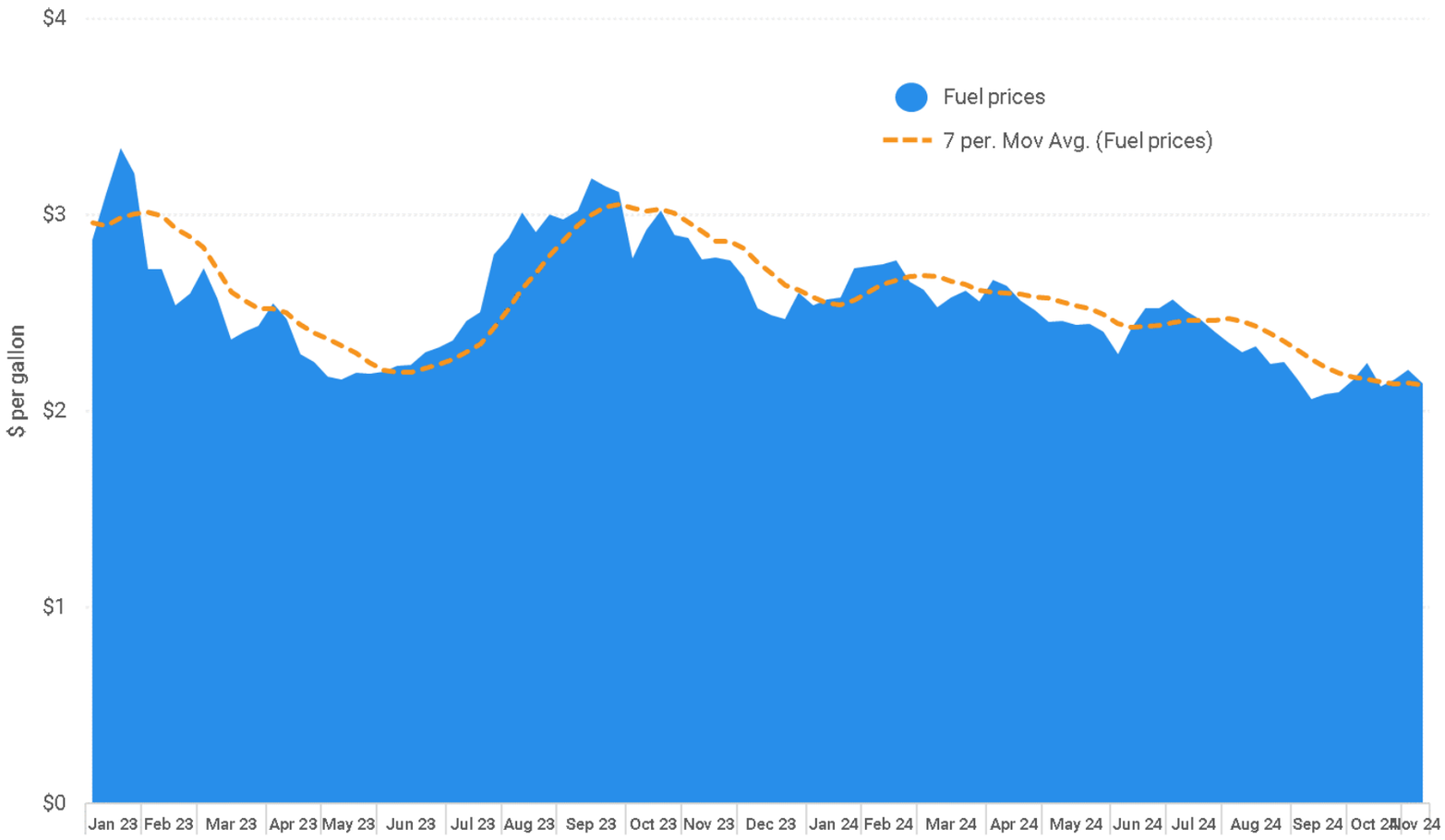
$2.21 /gallon

2%
vs. $2.16 /gallon
on 25 Oct 2024

Source: IATA/Platts

- The average price of jet fuel closed at 2.16 USD/gallon on 8 November 2024, a 2% increase 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.

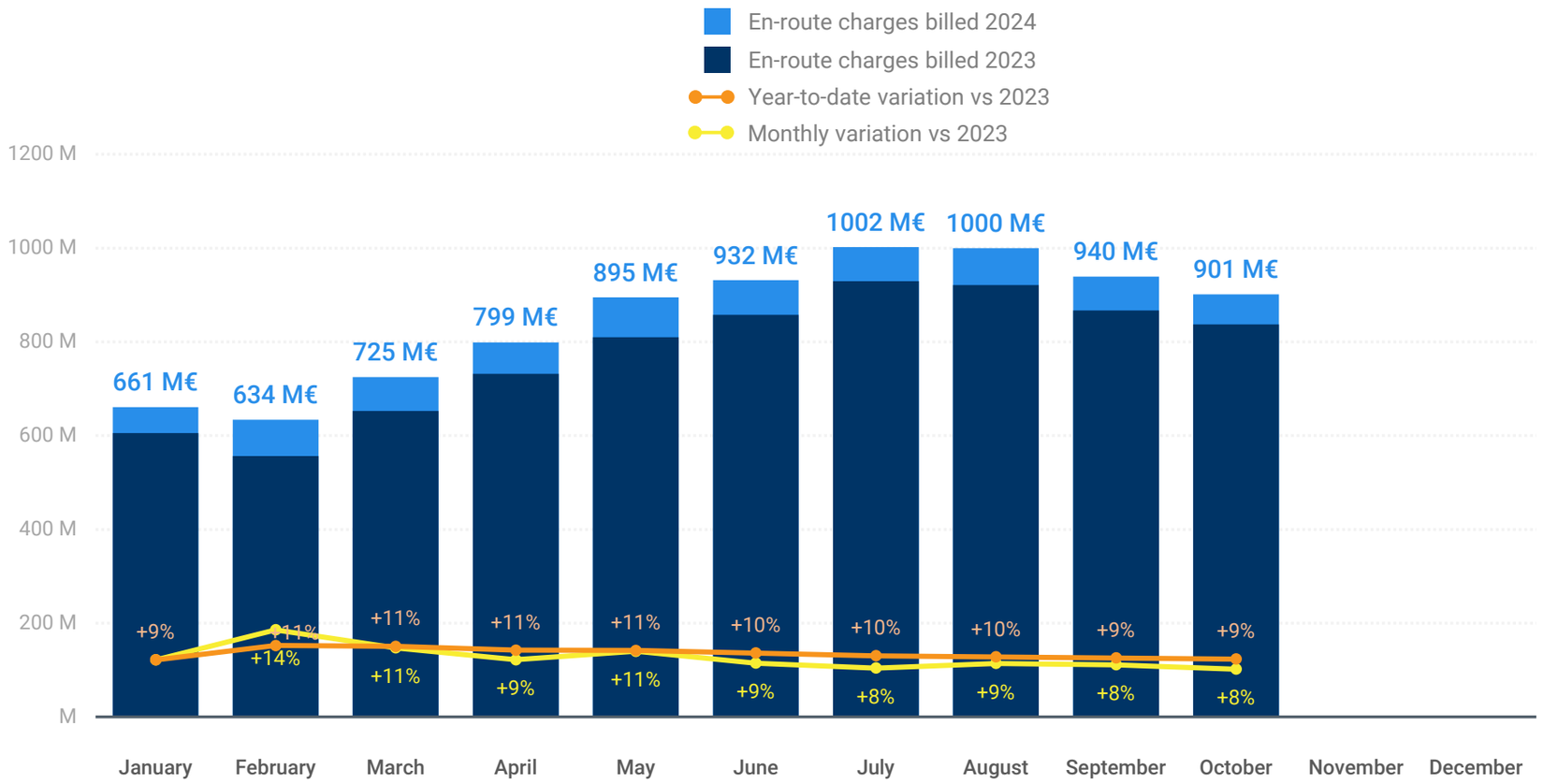
Jet fuel price (Europe)



Source: IATA/Platts

En-route air navigation charges for the EUROCONTROL Area (2024)

Year-to-date amount billed: 8,488 M€ (+9% vs 2023)



- At Network level, 901M€ were billed for October 2024 which represents +8% vs 2023 and +29% vs 2019.
- These changes were driven by the evolution of unit rates and of traffic characterized by the distance flown and the weight of each aircraft (or Service Units).
- The October 2024 variation vs October 2023 (+8%) is explained by an increase in Unit Rates and an increase in total en-route Service Units (+4%).
- On a year-to-date basis, EUROCONTROL has billed 8,488M€, which is +9% vs 2023.

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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