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EUROPEAN AVIATION OVERVIEW

15-21 Jul 2024

Wednesday 24 July 2024

Headlines

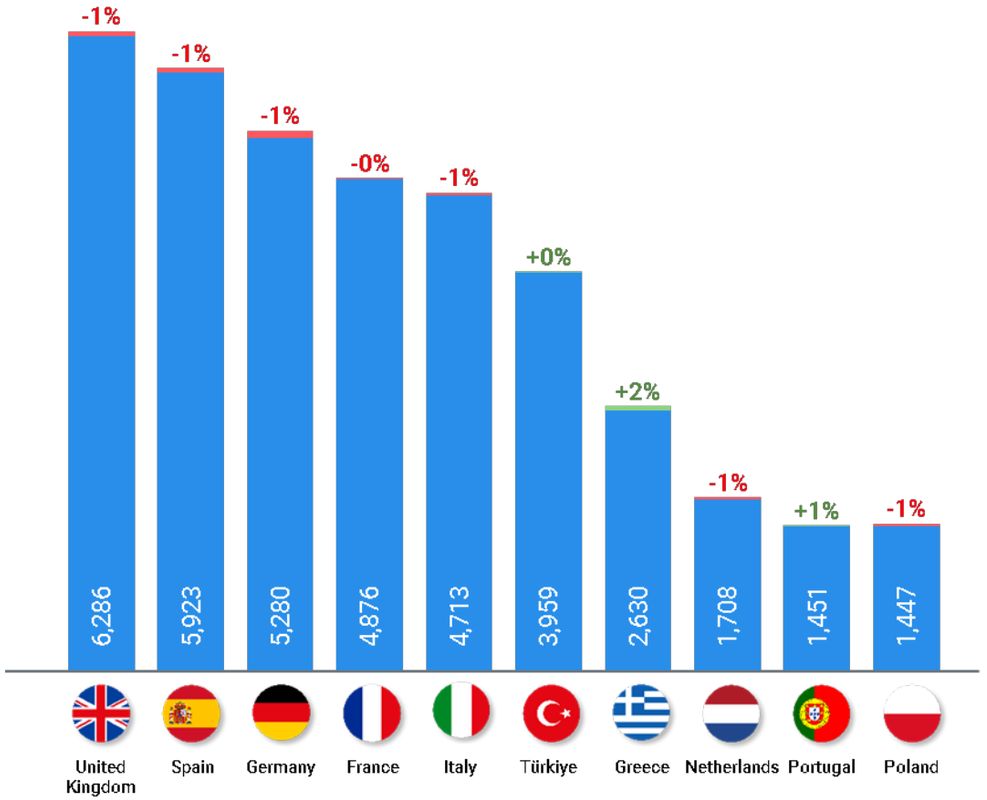
(Week 15-21 Jul 2024)

- The network recorded 34,260 average daily flights (+4% vs 2023). This was just below (-0.4%) the previous week's average. The last three days of the week recorded slightly fewer flights than the week before due to the global IT shutdown of 19 July.
- The CrowdStrike bug of 19 July had a knock-on effect on airlines and airports, putting additional pressure on an already saturated network. Combined with convective weather across much of central Europe, this resulted in significant delays and disruption across the continent.
- En-route ATFM delays averaged at a record level of 258,000 minutes per day (7.5 min/flight), +36% compared to the previous week. The ACCs located in South-east Europe were particularly affected.
- The average jet fuel price in Europe reached 2.47 USD/gallon on 19 July 2024 (-4% compared to two weeks ago).
- EUROCONTROL billed 932M€ in en-route charges in June 2024, 9% above the amount billed for 2023 flights, reflecting more service units and higher unit rates.

Top 10 busiest States

On week 15-21 Jul 2024

(all flights excl. overflights compared with previous week)



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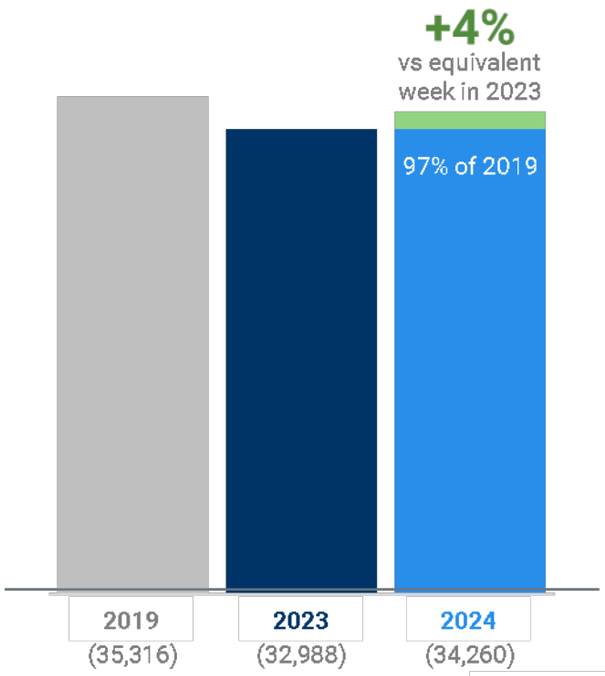
Traffic situation

Average daily flights (including overflights)

Week 15-21 Jul 2024



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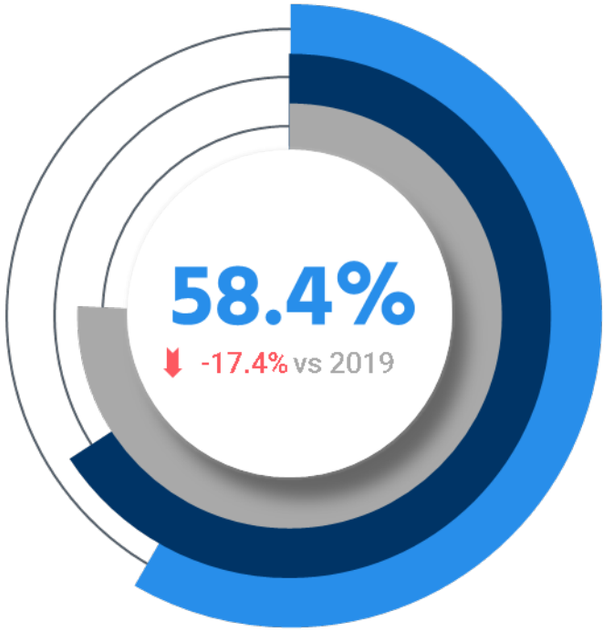
Arrival & departure punctuality

(all network scheduled flights)

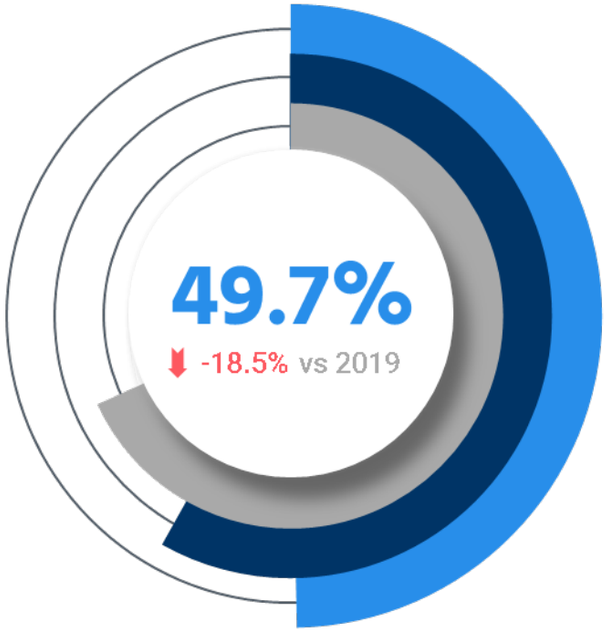
Week 15-21 Jul 2024

ARRIVAL PUNCTUALITY



75.7% _____ in 2019
65.8% _____ in 2023

DEPARTURE PUNCTUALITY



68.2% _____ in 2019
58.1% _____ in 2023

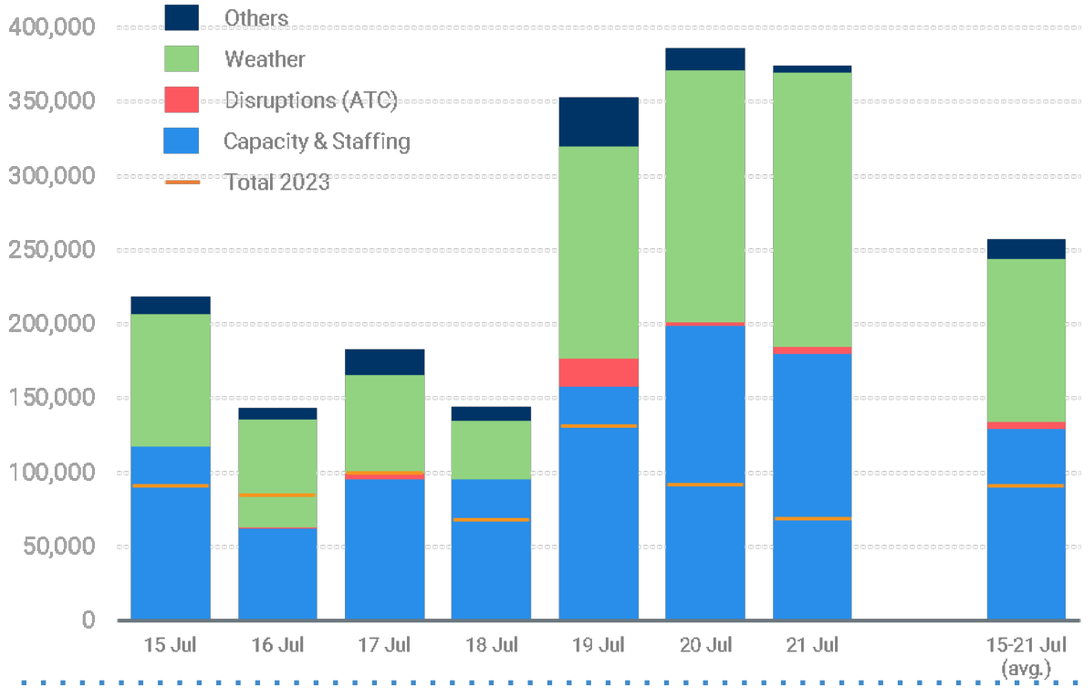
The pictures show the share of flights arriving/departing no later than 15 minutes after/before the scheduled time (OTP15).

- Network punctuality deteriorated when compared to the equivalent week in 2023. Arrival punctuality fell by 7.4 percentage points to 58.4%, with departure punctuality falling by 8.4 percentage points to 49.7%; compared to the same week in 2019 the drop was even worse.
- Significant ATFM delays were recorded during the week, mainly due to ATC capacity and weather reasons (seasonal weather such as thunderstorm activity) causing high delays for aircraft operators. Multiple airlines and airports were impacted by the global IT outage that occurred on Friday 19 July.
- London Gatwick experienced ATFM regulations due to aerodrome capacity and weather (15 July being notably bad for weather due to LVP and CBs); the airport was also impacted by the IT outage on 19 July. Athens continues to suffer from daily ATC capacity regulations. Nice saw ATC staffing regulations throughout the week and there were also special regulations due to a French cycling event (Tour de France final days 20/21 July). Amsterdam Schiphol experienced daily regulations for aerodrome capacity as well as some weather regulations for heavy rain and CB activity. London Heathrow saw a sharp increase in ATFM arrival delay, with the airport suffering from multiple factors: aerodrome capacity, weather (high winds) and the IT outage on 19 July.

En-route ATFM delays

Delays per cause (EUROCONTROL Area)

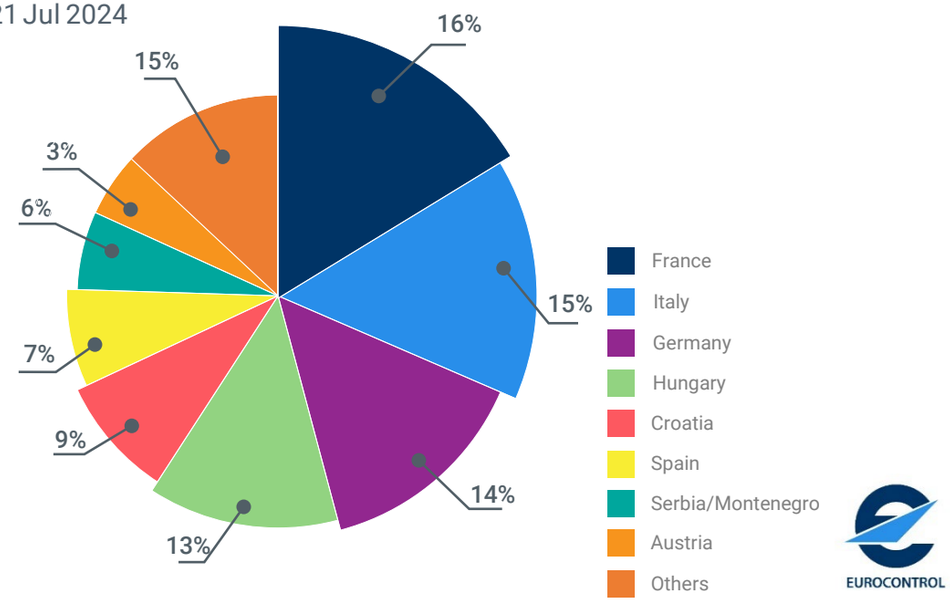
In minutes (total daily and 7-day average) in 2024



- Week 29 (15-21 July) registered a new record in terms of en-route ATFM delays with an average of 257,700 minutes, equivalent to 7.5 min/flight (previous peak was during week 26, with 7.2 min/flight). En-route ATFM delays were 36% above last week's levels and 183% higher than in the equivalent week of 2023.
- Capacity/staffing was the main cause (50%), notably owing to the Rome, Karlsruhe, Budapest and Marseille centres, which generated the most delays.
- Weather accounted for 42% of en-route delays owing to convective weather with disruptions in the Balkans and Hungary. Italy/France were also affected over the weekend.

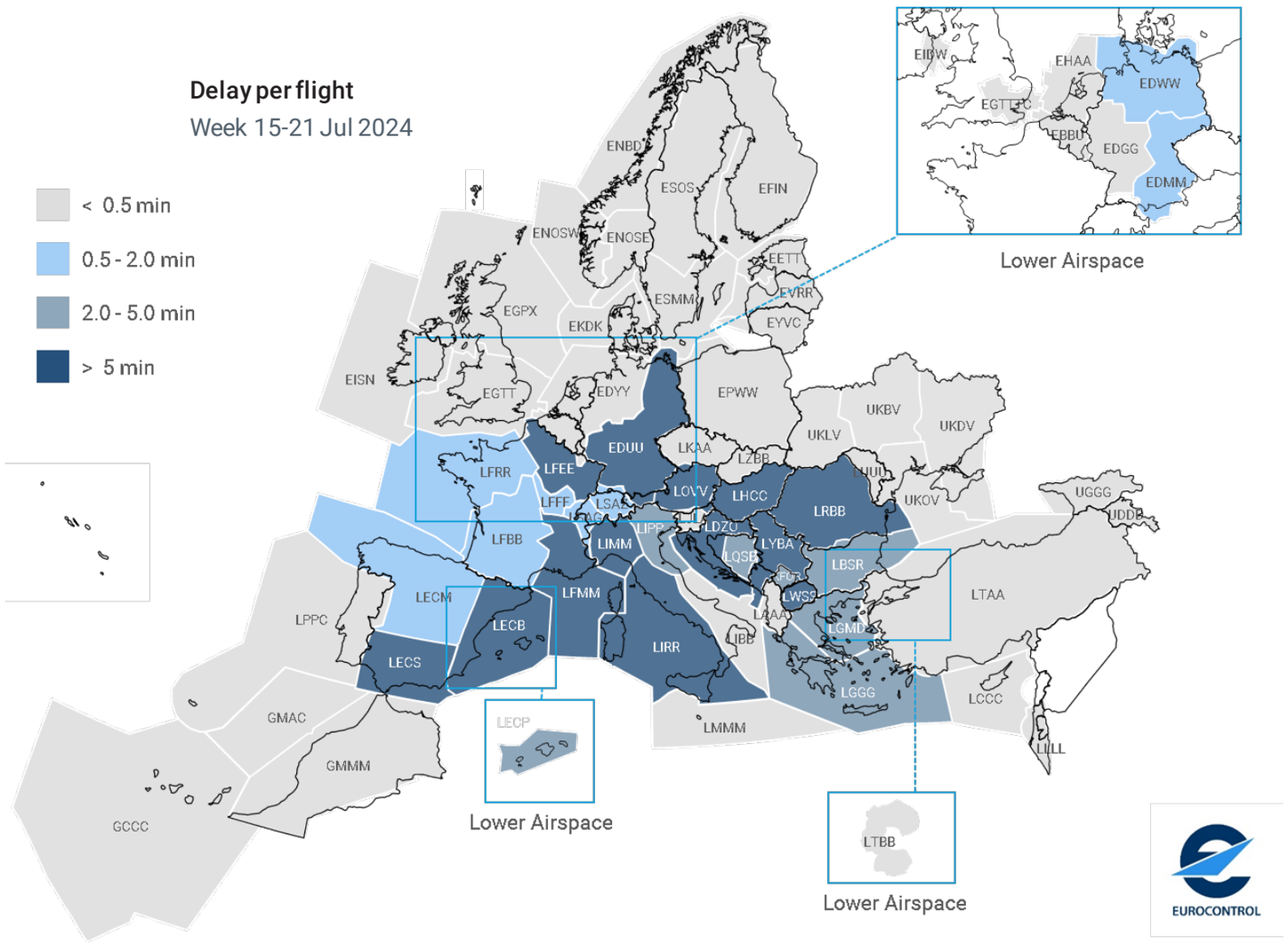
Share of en-route ATFM delays

Week 15-21 Jul 2024



- France accounted for 16% of all en-route ATFM delays with capacity/staffing issues (9.6pp) and weather issues (5.3pp). The issues were mostly localised in Marseille and Reims ACCs. Moreover, industrial action affected Marseille ACC over the weekend.
- Italy accounted for 15% with technical issues (OLDI connection) in Rome ACC as well as high demand leading to capacity measures (11.8pp) and was affected by convective weather (3.3pp) over the weekend.
- Germany accounted for 14% with ongoing capacity/staffing issues (6.9pp) mostly at Karlsruhe ACC, as well as convective weather throughout the week (6.8pp).
- Hungary accounted for 13% owing to capacity/staffing (4.6pp) and weather (5.4pp). Flight demand was 20% above 2019 with onload from L'viv FIR.

En-route ATFM delayed flights per Area Control Centre



- Over Week 29, twenty ACCs recorded en-route ATFM delays higher than 1.0 min/flight.
- Budapest ACC recorded 9.4 min/flight mainly due to daily protective capacity measures with significant on-load from flights avoiding L'viv FIR. Flight growth for the week was 22% above 2019 with convective weather disruptive on, in particular, Tuesday, Friday and Sunday.
- Zagreb ACC recorded 6.7 min/flight. Convective weather between Tuesday and Friday affected traffic management. Some sector capacity measures were put in place due to high demand (27% above 2019).
- Rome ACC recorded 6.5 min/flight as capacity measures were put in place from Friday to Sunday due to high demand (flight growth was +22% on 2019) and ongoing difficulties with OLDI system with neighbouring ANSPs. Convective weather complicated the situation during the weekend.
- Karlsruhe ACC recorded 5.2 min/flight due to convective weather all week, in particular in the afternoons, as well as capacity measures.
- Marseille ACC recorded 4.4 min/flight owing to some capacity measures due to OLDI connection issues. ATC staffing issues were recorded over the weekend, in particular in the East sector group, partly attributed to industrial action

Top 10 States

Departures and arrivals

Week 15-21 Jul 2024

See more

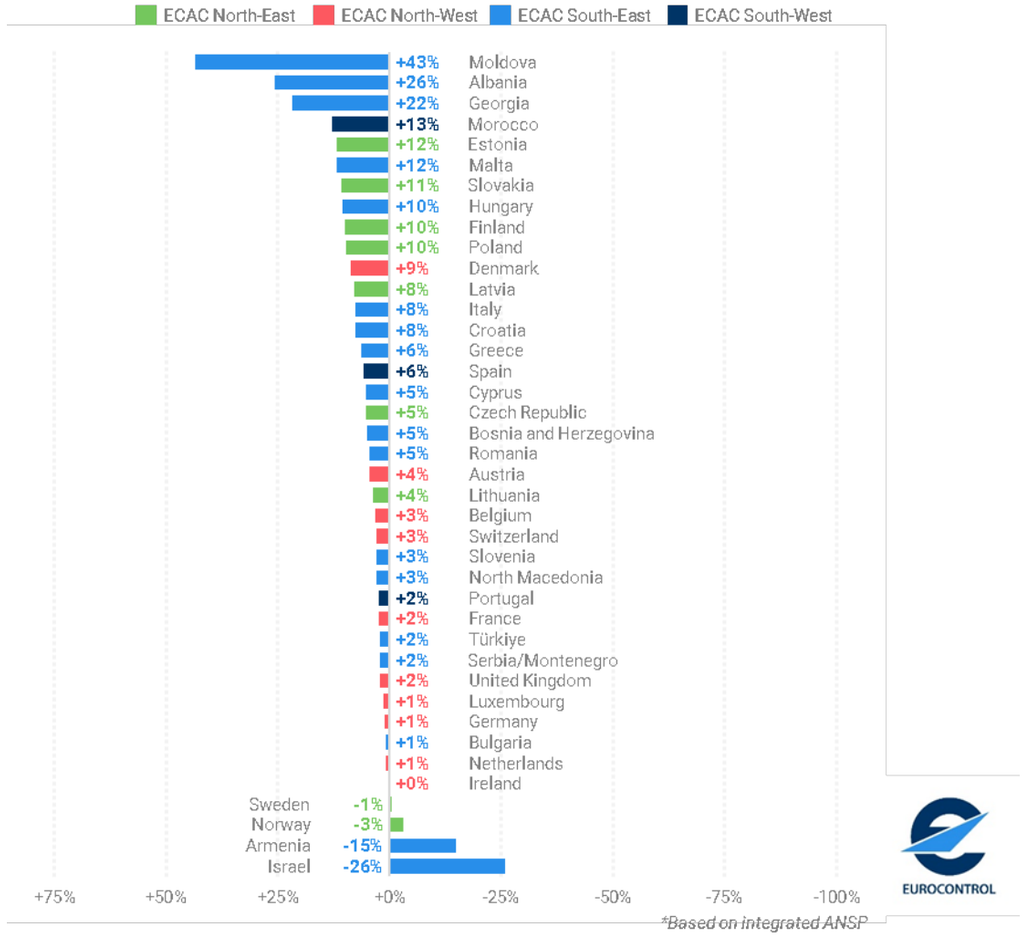
No.	Country	Average daily flights	% prev week	% prev year	% 2019
1.	United Kingdom	6,286	-1%	+2%	-6%
2.	Spain	5,923	-1%	+6%	+5%
3.	Germany	5,280	-1%	+1%	-15%
4.	France	4,876	-0%	+2%	-4%
5.	Italy	4,713	-1%	+8%	+5%
6.	Türkiye	3,959	+0%	+2%	+10%
7.	Greece	2,630	+2%	+6%	+18%
8.	Netherlands	1,708	-1%	+1%	-6%
9.	Portugal	1,451	+1%	+2%	+9%
10.	Poland	1,447	-1%	+10%	+12%

- The top 10 States, in aggregate, recorded 0.5% fewer flights than in the previous week.
- Compared to the previous edition, there was no change in the top 10 ranking.
- Most of the States recorded fewer number of flights vs the previous week (-1%).
- Greece recorded the greatest increase (+2%, mainly thanks to small operators and NetJets) on domestic flows, and on the flows Greece ↔ Cyprus & Greece ↔ Bulgaria.
- 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 4% and 15% below pre-COVID levels.
- At network level, the lowest number of flights compared to the same week in 2023 was to/from Israel (-26%).

States in the EUROCONTROL Network

Compared to the equivalent week in 2023

Dep/Arr flights for week 15-21 Jul 2024



*Based on integrated ANSP

Top 10 aircraft operators

Week 15-21 Jul 2024 (avg daily flights)

No.	Aircraft operator	Average daily flights	% prev week	% prev year	% 2019
1.	Ryanair Group	3,549	-1%	+7%	+35%
2.	easyJet Group	1,784	-1%	+3%	-6%
3.	Turkish Airlines Group	1,556	+0%	-2%	+6%
4.	Lufthansa Airlines	1,221	+0%	-2%	-22%
5.	Air France Group	1,131	-1%	+4%	-13%
6.	KLM Group	904	-1%	+1%	-4%
7.	Wizz Air Group	898	-2%	-2%	+36%
8.	British Airways Group	863	-1%	+3%	-12%
9.	Vueling	690	-3%	-2%	-6%
10.	SAS Group	628	-1%	-2%	-19%

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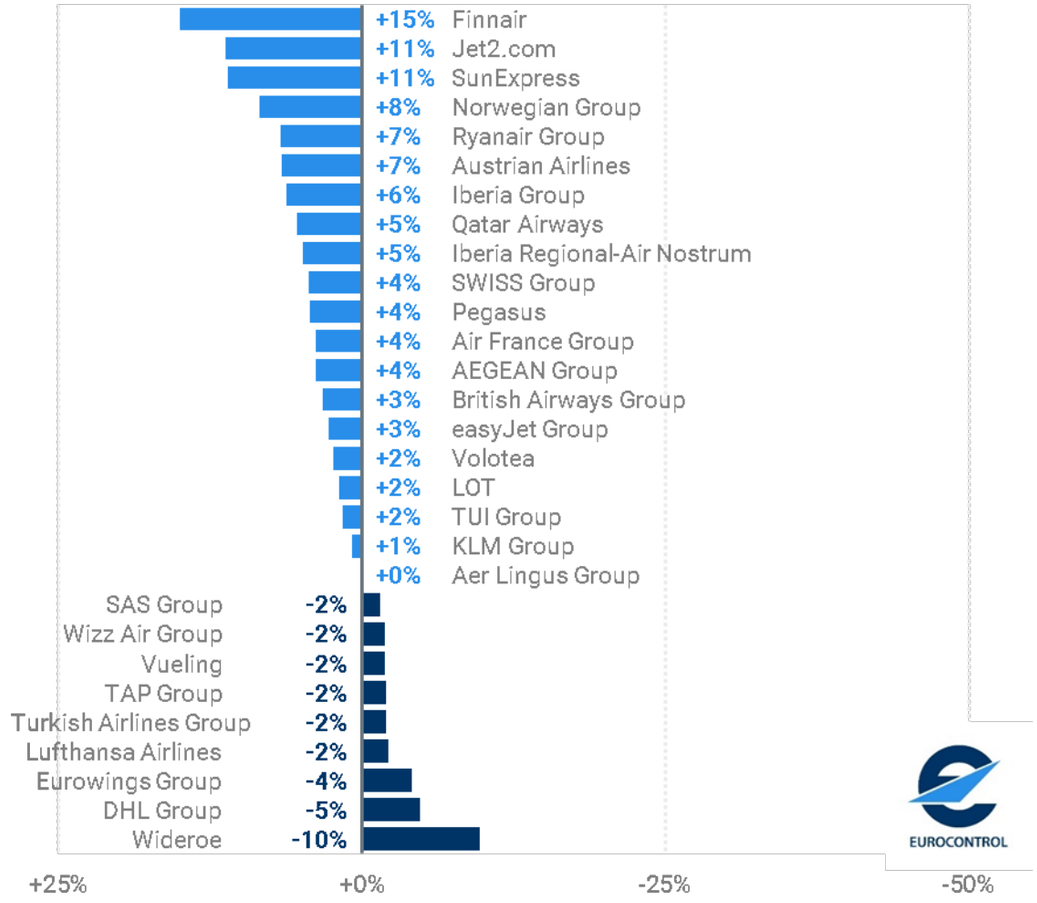
- The top 10 aircraft operators, in aggregate, posted a slight decrease (-1.1%) in number of flights compared to the previous week, owing to the IT outage of 19 July (CrowdStrike bug).
- Most affected aircraft operators in this top 10 on Friday 19 July were Vueling (-19% vs equivalent day in 2023), KLM Group (-17%) and Wizz Air Group (-16%).
- Hence, over week 29, the largest decrease was for Vueling (-3% vs week 28), mainly on domestic flows in Spain.
- Turkish Airlines and Lufthansa Group managed to record similar capacities as in week 28.
- In Week 29, three top 10 airlines posted flight numbers above 2019 levels: +36% for Wizz Air Group, +35% for Ryanair Group and +6% for Turkish Airlines Group.

Aircraft operators in the EUROCONTROL Network

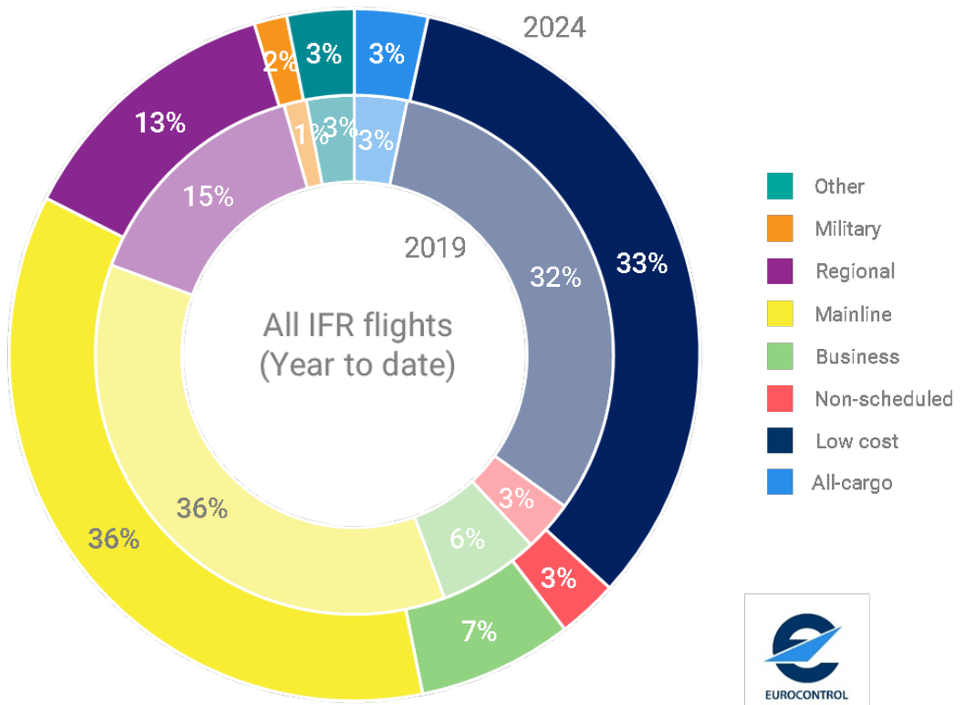
Compared to the equivalent week in 2023

Dep/Arr flights for week 15-21 Jul 2024



Market segments in the EUROCONTROL Network

Average share of total flights (year to date)



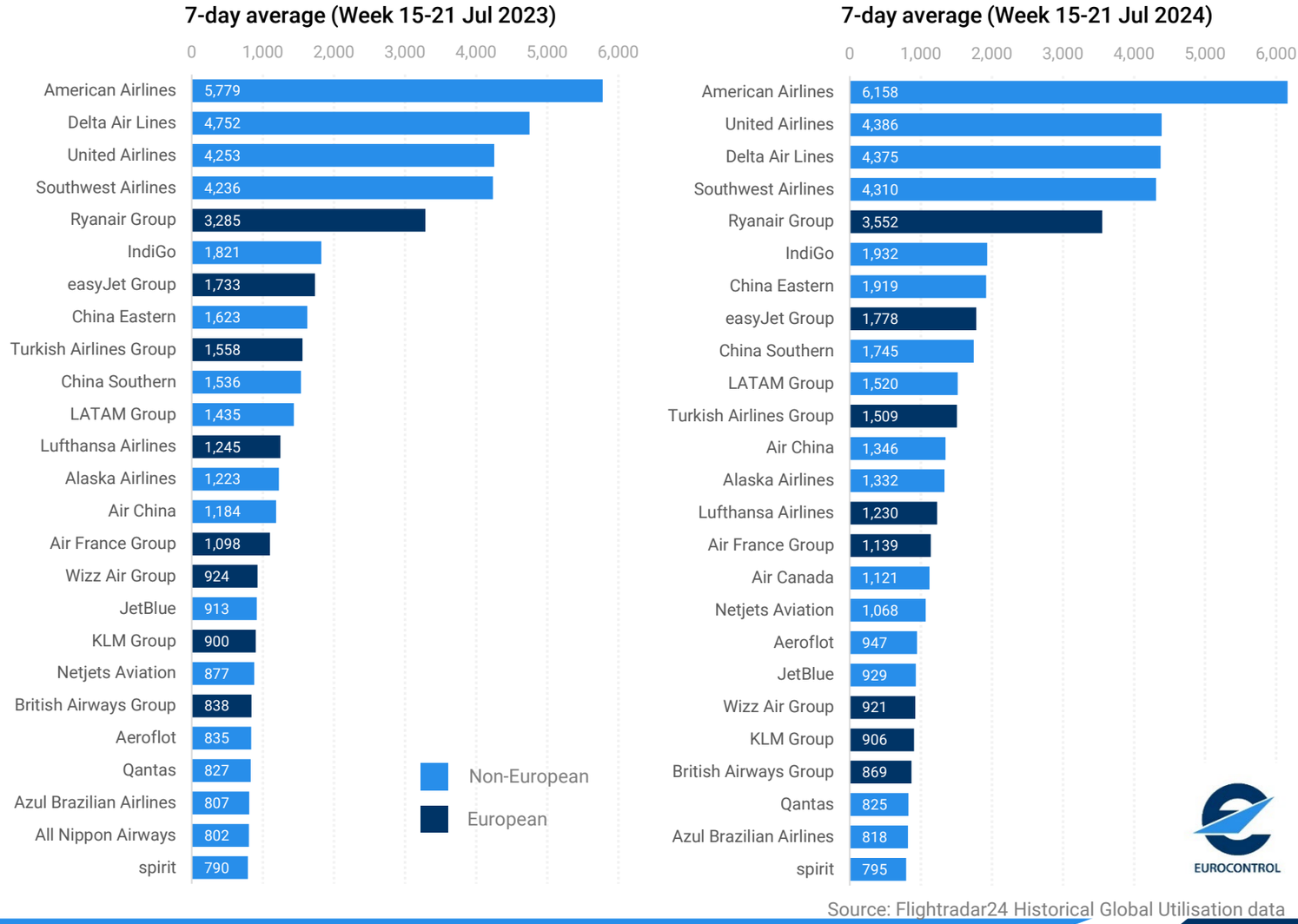
Week 15-21 Jul 2024

No.	Market segment	Avg. flights	% prev week	% prev year	% 2019
1.	Low Cost	11,778	-2%	+5%	+2%
2.	Mainline	11,763	+0%	+5%	-4%
3.	Regional	4,033	-0%	+1%	-15%
4.	Business	2,813	+2%	+5%	+25%
5.	Non-Scheduled	1,424	-1%	-1%	-20%
6.	Other	1,030	+0%	+3%	+2%
7.	All-cargo	988	+1%	-5%	+10%
8.	Military	434	+3%	+4%	+4%

- 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 15-21 July (compared to 2023), passenger flight numbers have recorded positive growth rates: Low Cost (+5%), Mainline (+5%) and Regional (+1%), except for Non-Scheduled (-1%), owing to declines on Türkiye ↔ Israel, Germany ↔ Greece and Greece ↔ UK. All-cargo is down (-5%) with fewer flights on flows domestic UK, Germany ↔ Italy, Algeria ↔ France and domestic France, when compared to 2023 levels.
- Three market segments are recording flights below 2019 levels. The non-scheduled market segment has seen a notable decline vs 2019 (-20%) due to the war in Ukraine (notably on flows Russia ↔ Türkiye, Türkiye ↔ Ukraine and Egypt ↔ Ukraine). The Regional market segment has declined by 15% compared to 2019, reflecting decreased domestic flows in Spain, France, Germany, Sweden and Italy. The Mainline segment (-1%) recorded less flights on flows Germany ↔ Russian Federation, Italy ↔ Russian Federation, domestic Germany and domestic France flows.

Top 25 global aircraft operators

(average daily departure flights)

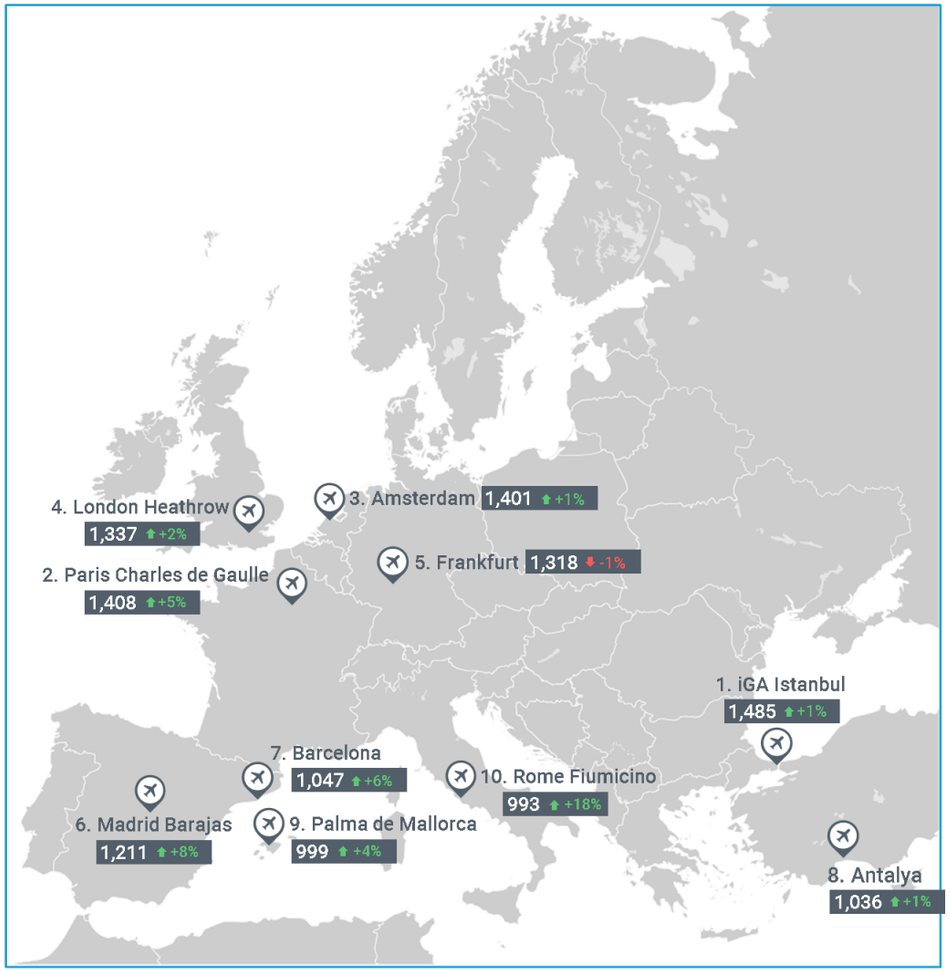


Source: Flightradar24 Historical Global Utilisation data

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, three places lower than two weeks ago.
- Seven more European carriers make the top 25: easyJet Group (8th position), Turkish Airlines Group (11th), Lufthansa Airlines (14th), Air France Group (15th), Wizz Air Group (20th), KLM Group (21st) and British Airways Group (22nd).

Top 10 airports



Airport ranking

Week 15-21 Jul 2024

See more

No.	Airport	Avg. daily dep/arr flights	% prev week	% prev year	% 2019
1.	iGA Istanbul	1,485	-0.5%	+1%	+17%
2.	Paris Charles de Gaulle	1,408	-0.4%	+5%	-7%
3.	Amsterdam	1,401	-0.2%	+1%	-7%
4.	London Heathrow	1,337	-0.4%	+2%	-3%
5.	Frankfurt	1,318	+1.2%	-1%	-14%
6.	Madrid Barajas	1,211	-2.0%	+8%	-3%
7.	Barcelona	1,047	-1.1%	+6%	-3%
8.	Antalya	1,036	-0.5%	+1%	+10%
9.	Palma de Mallorca	999	-1.2%	+4%	+7%
10.	Rome Fiumicino	993	-1.6%	+18%	+2%

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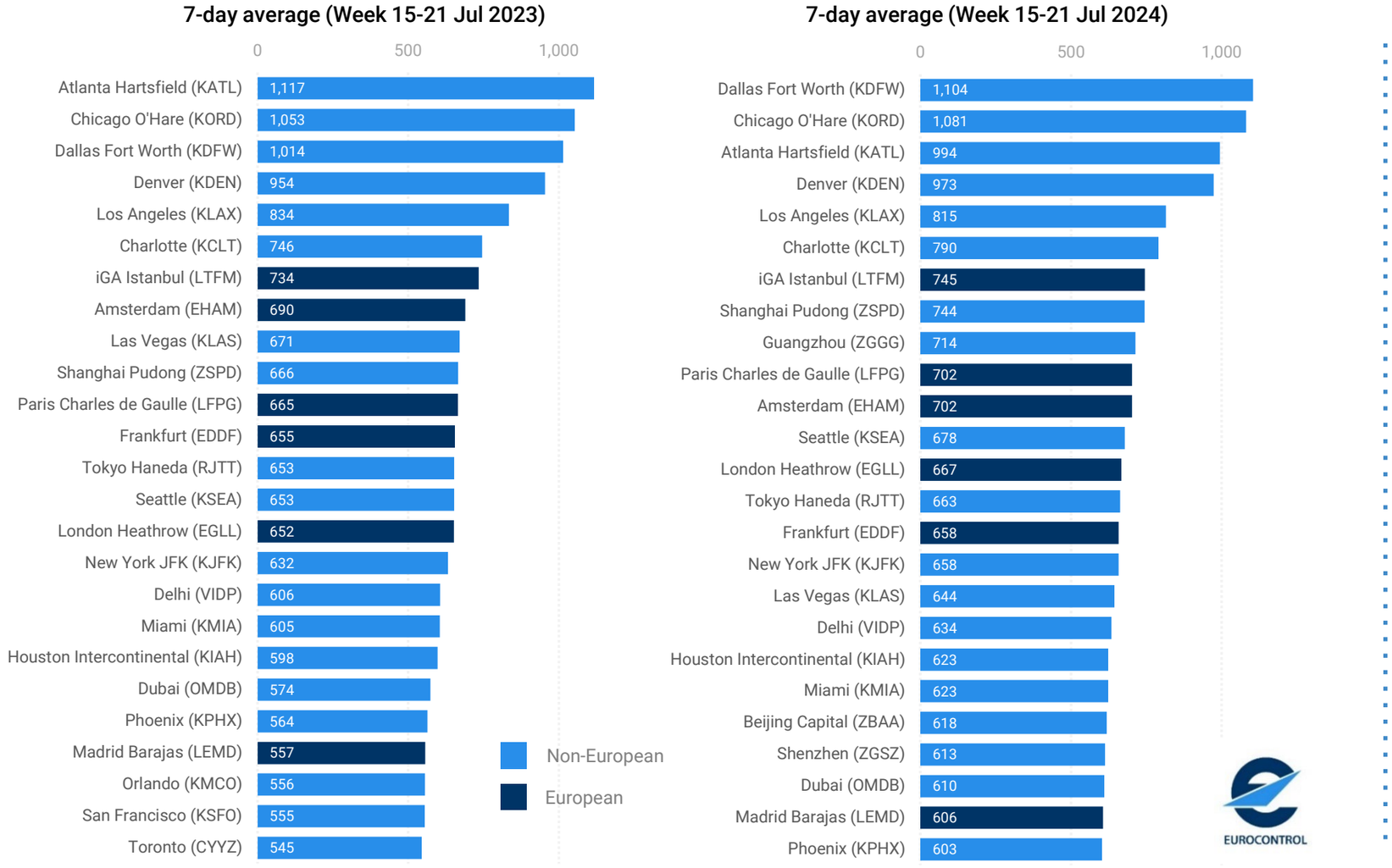
- One small change in the ranking compared to the previous edition saw Palma de Mallorca and Rome Fiumicino swap places.
- iGA Istanbul (1,485 flights per day, -0.5% vs previous week) remains the busiest airport followed by Paris CDG (1,408, -0.4%) and Amsterdam (1,401, -0.2%).
- Within this top 10, the most affected airports on Friday 19 July (IT outage) were iGA Istanbul (-6% vs equivalent day in 2023), Palma de Mallorca (-6%) and Frankfurt (-4%).
- On a weekly basis, all top airports are handling more flights than in 2023 (except Frankfurt: -1%), with increases ranging from +1% (iGA Istanbul) to +18% (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

(average daily departure flights)



Source: Flightradar24 Historical Global Utilisation data

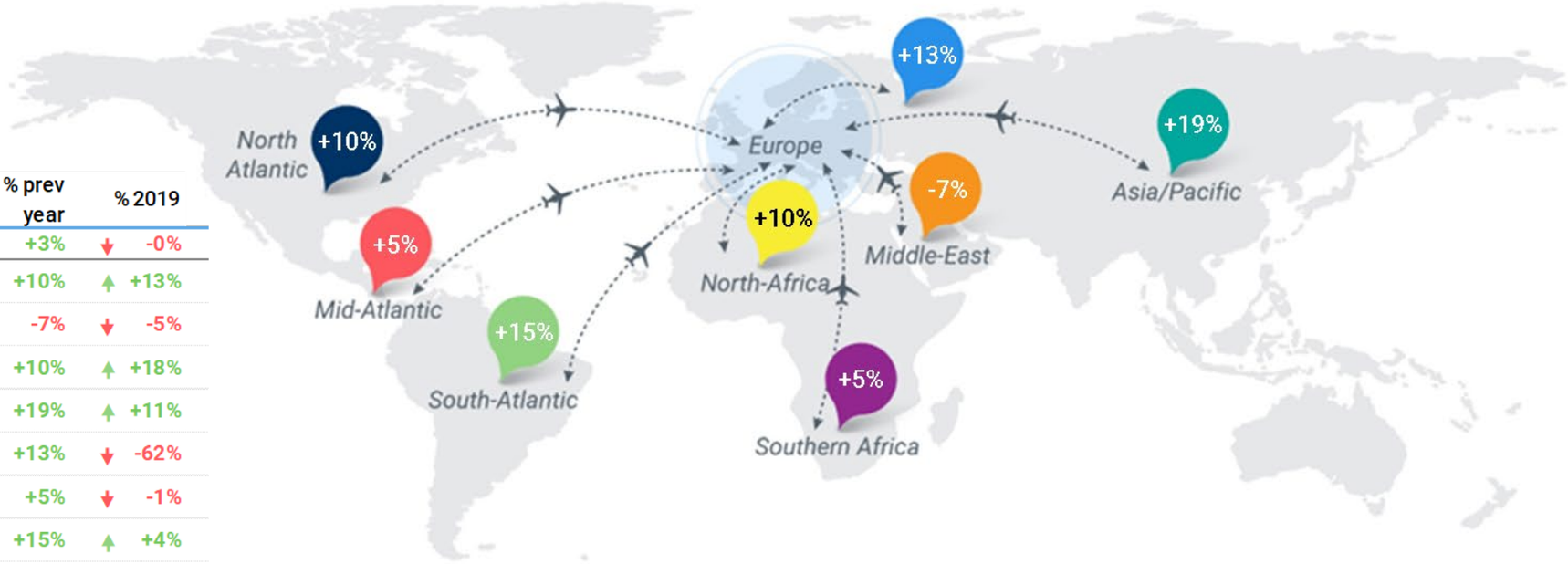
Over the last week:

- Six European airports appear in the top 25 of global airport departures (similar to the corresponding week in 2023).
- There are two European airports in the top 10 with iGA Istanbul (7th) and Paris CDG (10th).
- The other four European airports in the top 25 are Amsterdam (11th), London Heathrow (13th), Frankfurt (15th) and Madrid Barajas (24th).
- There are now two Asian airports in the top 10 – Shanghai (8th) and Guangzhou (9th).

Traffic flows

(average daily departure/arrival flights for week 15-21 Jul 2024)

Region	Average daily flights	% prev week	% prev year	% 2019
Intra-Europe	26,609	-1%	+3%	-0%
Europe ↔ North Atlantic	1,641	-1%	+10%	+13%
Europe ↔ Middle-East	1,610	+1%	-7%	-5%
Europe ↔ North-Africa	1,422	-1%	+10%	+18%
Europe ↔ Asia/Pacific	927	+0%	+19%	+11%
Europe ↔ Other Europe	501	+1%	+13%	-62%
Europe ↔ Southern Africa	310	-0%	+5%	-1%
Europe ↔ South-Atlantic	204	+2%	+15%	+4%
Europe ↔ Mid-Atlantic	176	+0%	+5%	+2%
Non Intra-Europe	6,791	-0%	+6%	-5%



- The main traffic flow - intra-European - recorded 26,609 daily flights last week, 1% lower than the previous week. Intercontinental flows amounted to 6,791 daily flights on average, slightly below (-0.2%) 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 on flows between Europe and United States and Canada.
- The third-largest regional flow is between Europe and the Middle East with 1,610 average daily flights, a 1% increase compared to the previous week.
- The fourth flow is to/from North Africa, where the 1,422 daily flights reflect a 1% decrease on the previous week (decrease on flows with Tunisia and Algeria).
- Flows with 'Other Europe' (including the Russian Federation) remain massively reduced at -62% compared to 2019.
- Flows between Europe and the Asia/Pacific region are 19% above the same week in 2023 and 11% above 2019 levels

Top 10 long-haul country pairs

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

Week 15-21 Jul 2024

No.	Country pair	Average daily flights	% prev week	% prev year	% 2019
1.	UK ↔ US	335	-1%	-1%	+1%
2.	Germany ↔ US	175	+0%	-3%	-2%
3.	France ↔ US	157	-1%	+11%	+13%
4.	Italy ↔ US	109	-2%	+10%	+25%
5.	Spain ↔ US	87	+4%	+16%	+8%
6.	Netherlands ↔ US	78	-2%	-1%	-12%
7.	Ireland ↔ US	77	-2%	+5%	+9%
8.	UAE ↔ UK	62	-1%	+5%	-7%
9.	Iceland ↔ US	53	-4%	n.a	n.a
10.	Canada ↔ UK	51	-2%	+3%	-11%

- 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 one long-haul flow posted increase on the previous week, namely the Spain ↔ US flow (+4%) – as a result of more flights by small aircraft/business aviation operators.
- Most of the US flows recorded flat or negative growth rates during week 29 (vs the week before) owing to the global IT outage on 19 July.
- Five flows are currently at or above 2019 levels.

Economics

Week 15-21 Jul 2024

19 Jul 2024
avg fuel price:

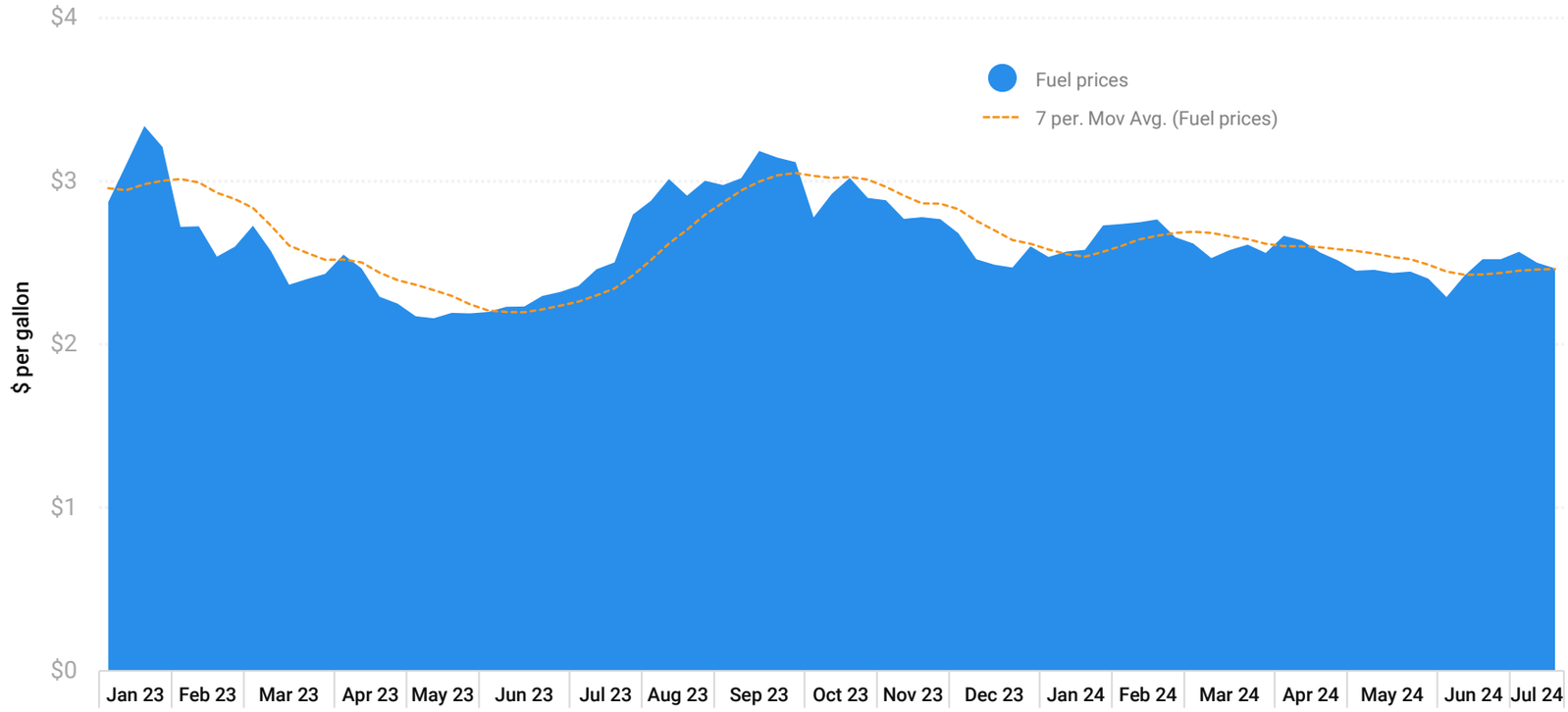
$2.47 /gallon

-4%

vs. $2.57 /gallon
on 05 Jul 2024

Source: IATA/Platts

Jet fuel price (Europe)

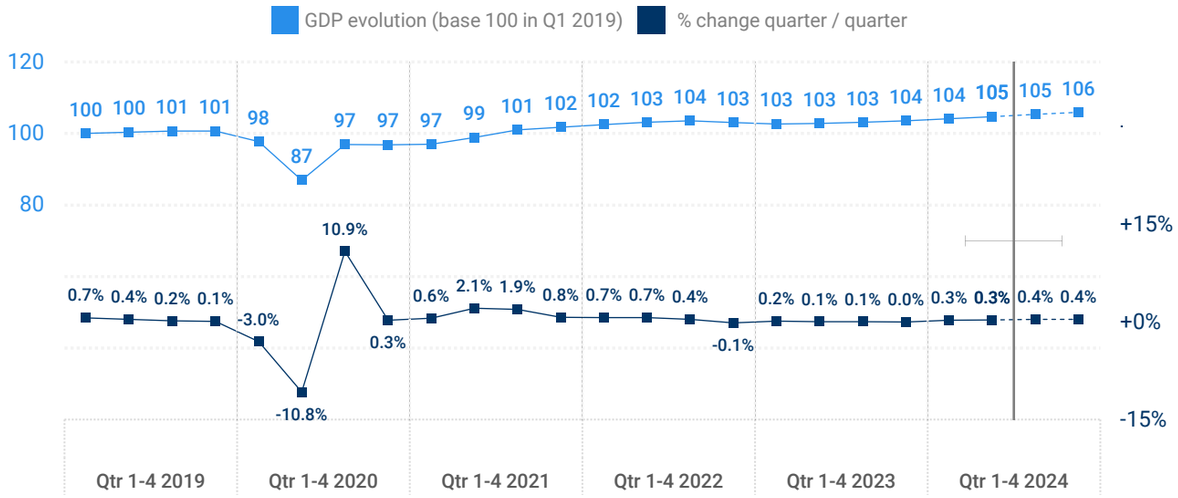


Source: IATA/Platts

- The average price of jet fuel stood at 2.47 USD/gallon on 19 July 2024, a 4% 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.

GDP in the European Union

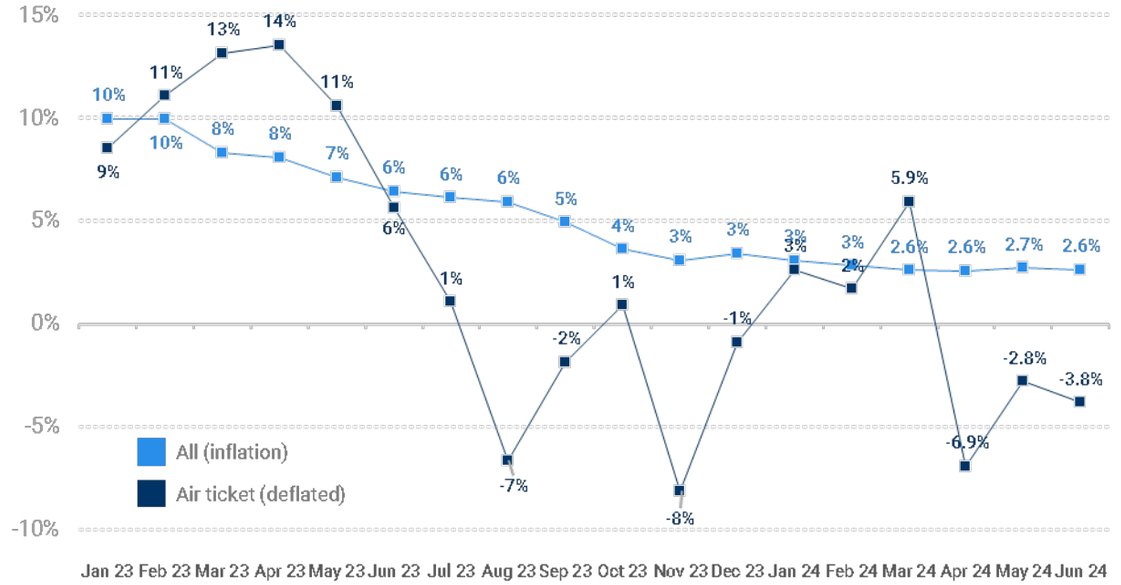
Constant prices and exchange rate, Euro



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:

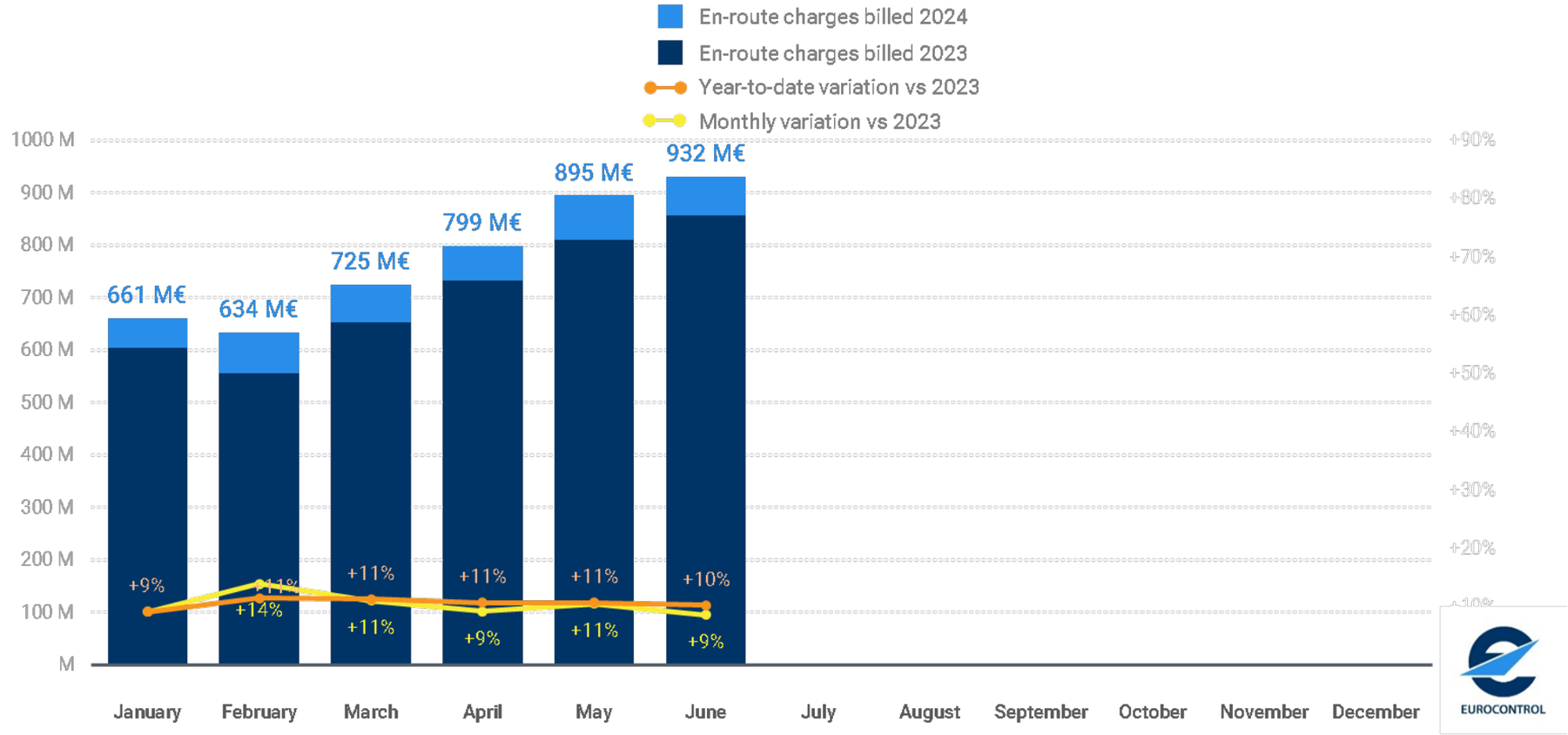
- The growth during Q1 2024 was broad-based across the largest economies, and overall EU27 GDP grew by 0.3%. For Q2, some economies, such as Germany and Italy, are expected to grow at a slower pace than in Q1 due to specific factors. However, the EU27 economies are likely to still post a 0.3% growth during Q2 2024 (vs Q2 2023, 12 July 2024 data).
- The EU27 quarterly forecast rates for Q3 and Q4 2024 remain unchanged at 0.4% (each), compared to the previous forecast.
- At an annual level, Oxford Economics Ltd. expects the EU27 GDP to expand by 0.9% in 2024 and by a relatively robust 1.9% in 2025.

The latest information from EUROSTAT shows the following:

- In June 2024, all-prices inflation stood at +2.6%; ticket prices decreased by 3.8% (excluding inflation).
- All-prices inflation remained below 3% since the beginning of the year (vs same period in 2023). EUROSTAT Spring forecast expects the indicator to record 2.7% growth for 2024.
- It is the third month in a row with a decreasing ticket prices trend. However, the decrease in air ticket prices since April 2024 is related to the fact that the prices were quite high over the first half of 2023.

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

Year-to-date amount billed: 4,645 M€ (+10% vs 2023)



- At Network level, 932M€ were billed in June 2024 which represents +9% vs 2023 and +25% 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 June 2024 variation vs June 2023 (+9%) is explained by an increase in Unit Rates (+1%) and an increase in total en-route Service Units (+7%).
- On a year-to-date basis, EUROCONTROL has billed 4,645M€, which is +10% vs 2023.

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.

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