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EUROPEAN AVIATION OVERVIEW

12-18 Aug 2024

Wednesday 22 August 2023

Headlines

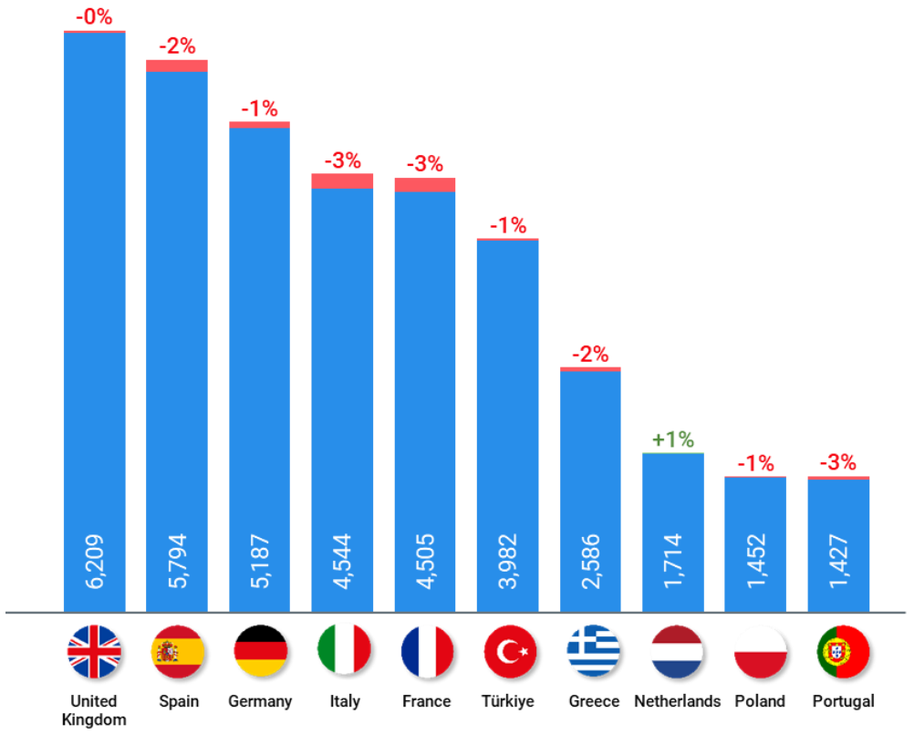
(Week 12-18 Aug 2024)

- The network recorded 33,680 average daily flights (+4.2% vs 2023). This was 1% below the previous week's average, reflecting the public holiday in many countries on 15 August.
- Network traffic (1-18 Aug) was at 98% of 2019 levels close to our latest base STATFOR forecast (97%) – but at State level, the situation is more diverse with some ACCs in the South-East axis experiencing traffic growth well beyond that. Year-to-date traffic is 95% of 2019, 5% more than 2023.
- The States in the South-East axis experienced the highest traffic increase compared to 2019, notably with a 2-digit increase for Moldova, Albania, Georgia, Hungary, Slovakia, Malta, Cyprus and Slovenia.
- En-route ATFM delay deteriorated compared to the previous week (+76%) with 186,394 daily minutes. This is 126% higher than in 2023 and represents on average, 5.53 min/flight.
- For August, en-route ATFM delay is 94% higher than in 2023. So far for Q3 (July, August, September), en-route ATFM delays are 83% higher than in Q3 2023.
- Convective weather was the top delay cause last week (54% of all en-route ATFM delays) followed by ATC capacity/staffing (39%).
- EUROCONTROL billed 1,002M€ in July 2024 (8% above July 2023 and 25% above July 2019) reflecting more service units (+6%) and higher unit rates

Top 10 busiest States

On week 12-18 Aug 2024

(all flights excl. overflights compared with previous week)



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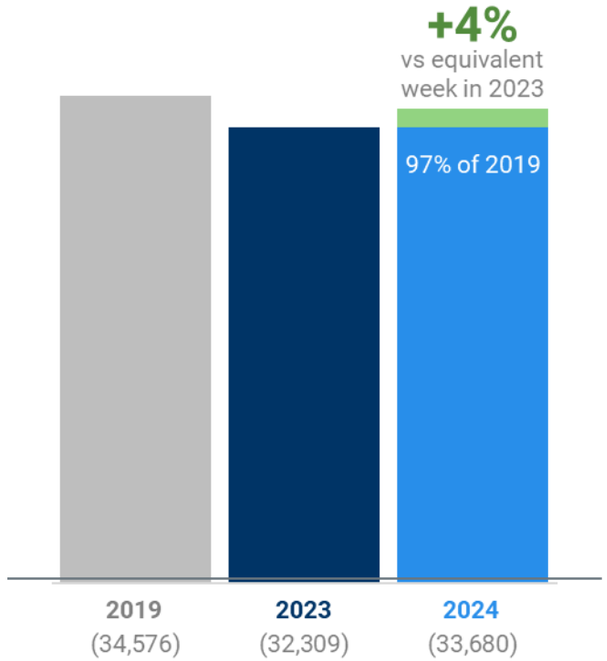
Traffic situation

Average daily flights (including overflights)

Week 12-18 Aug 2024



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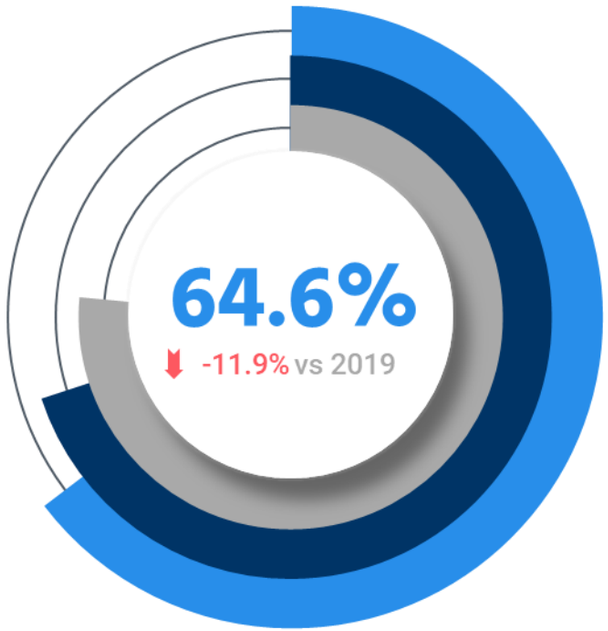
Arrival & departure punctuality

(all network scheduled flights)

Week 12-18 Aug 2024

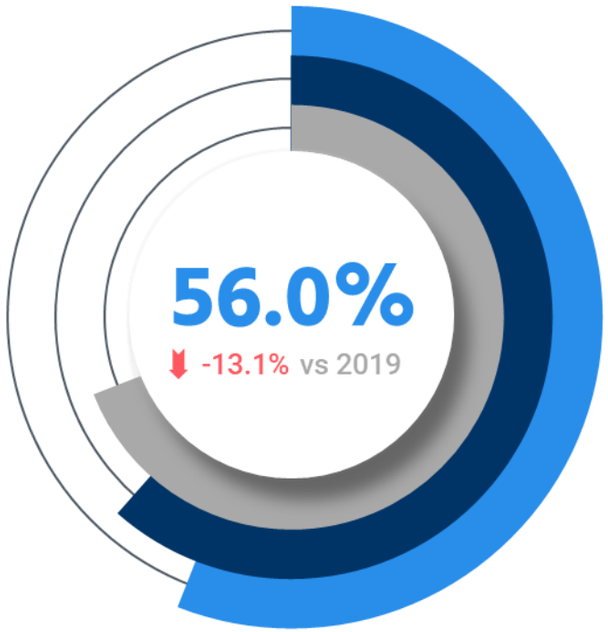
ARRIVAL PUNCTUALITY



76.5% _____ in 2019

70.0% _____ in 2023

DEPARTURE PUNCTUALITY



69.1% _____ in 2019

61.5% _____ in 2023

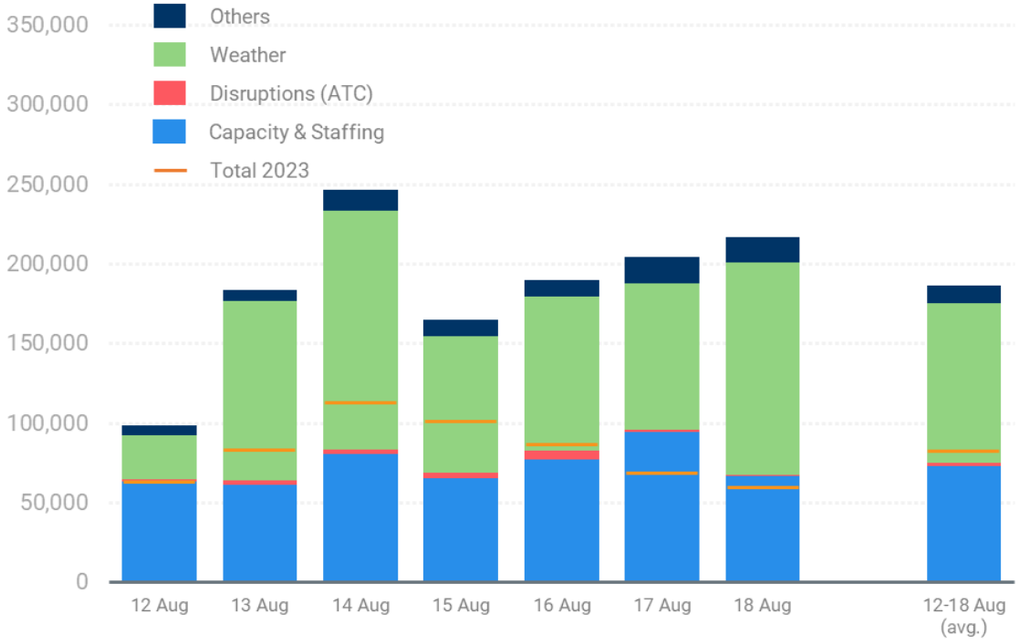
The pictures show the share of flights arriving/departing no later than 15 minutes after/before the scheduled time (OTP15).

- Network punctuality deteriorated when compared to the equivalent week in 2023. Arrival punctuality fell by 5.4 percentage points to 64.6%, with departure punctuality falling by 5.5 percentage points to 56.0%; compared to the same week in 2019 the drop was even worse.
- Significant ATFM delays were recorded during the week, mainly due to weather and ATC capacity reasons (seasonal weather such as thunderstorm activity) causing high delays for aircraft operators.
- Palma de Mallorca was severely impacted by weather (thunderstorms, high winds, squalls and dust) on 14, 15 & 16 August, with diversions and cancellations also an effect.
- Athens continues to suffer from daily ATC capacity or ATC equipment regulations
- Barcelona saw regulations due to weather, with 13 and 14 being notably bad for delays.
- Vienna saw two days (17 & 18 August) with regulations due to weather (CB's)
- Lisbon suffered from daily aerodrome capacity & ATC capacity regulations. There were also some regulations due to airspace management for a (military air display) on 16 and 17 August.

En-route ATFM delays

Delays per cause (EUROCONTROL Area)

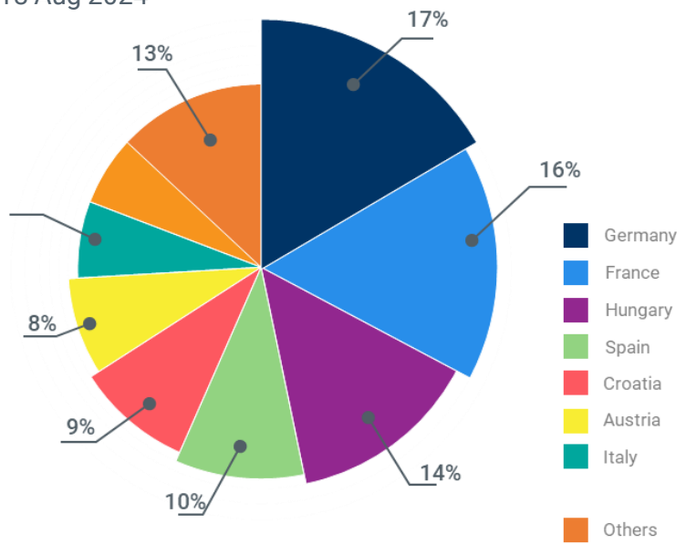
In minutes (total daily and 7-day average) in 2024



- En-route ATFM delay in Week 33 (12-18 August 2024) deteriorated compared to the previous week (+76%) with 186,394 daily minutes, which is 126% higher than in 2023.
- For August, en-route ATFM delay is 94% higher than in 2023. For Q3, en-route ATFM delays are, so far, 83% higher than in Q3 2023.
- Convective weather was the top delay cause (54%) followed by ATC capacity/staffing (39%).

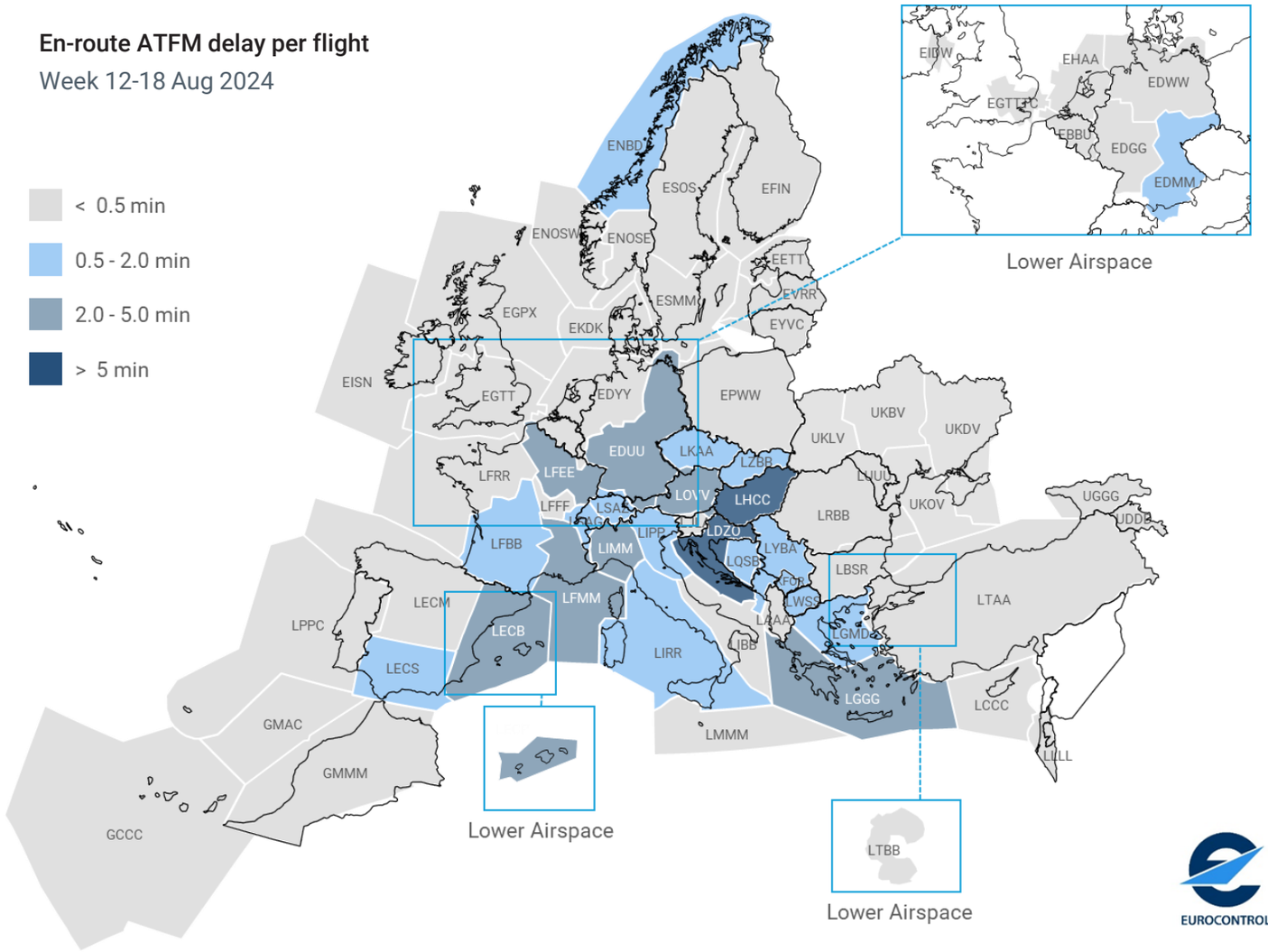
Share of en-route ATFM delays

Week 12-18 Aug 2024



- Germany accounted for 17% of all en-route ATFM delays mainly at Karlsruhe UAC 12.9pp of which 9.2pp weather and 3.3pp capacity/staffing; followed by Munich ACC 2.0pp.
- France accounted for 16% mainly in Marseille ACC 9.5pp (weather 5.6pp, staffing 3.8pp); Reims ACC 4.4pp (capacity 2.6pp, weather 1.8) and Bordeaux ACC 1.1pp.
- Hungary accounted for 14% mainly due to capacity/staffing + 'other' (13.7pp) and convective weather 0.3pp. Traffic was 24% above 2019 with onload from L'viv FIR and a flow Moscow – Türkiye.
- Spain accounted for 10% mainly in Barcelona ACC 5.5pp, of which 3.7pp due to weather and 1.9pp due to capacity/staffing. Palma ACC was second 2.7pp mainly due to the extreme weather conditions on 15 and 16 August.

En-route ATFM delayed flights per Area Control Centre



- In Week 33 (12-18 August 2024), nineteen ACCs recorded en-route ATFM delays higher than 1.0 min/flight.
- Budapest ACC recorded 7.2 min/flight. Traffic was 24% above 2019 level reflecting the high traffic demand and on-load from flights avoiding L'viv FIR all week. Weather-related disturbances on Thursday and Sunday.
- Zagreb ACC recorded 5.2 min/flight. Traffic was 25% above 2019 level, and 9% above 2023. Convective weather (3.6 min/flight) was the main cause of ATFM delays, in particular Thu, Sat and Sun, followed by capacity/staffing issues (1.6min/flight).
- Marseille ACC recorded 4.3 min/flight. Traffic was 3% above 2019 level, and 6% above 2023. Convective weather (2.6) affected both Eastern and Western sectors on Thursday and Friday while Capacity/staffing represented 1.7 min/flight.
- Karlsruhe UAC recorded 4.2. Traffic was 2% above 2019 level and 5% above 2023. Weather disturbed operations throughout the week (3.1 min/flight), followed by capacity/staffing issues (1.1).
- Vienna ACC recorded 4.2 min/flight. Traffic was 12% above 2019 level and 1% above 2023. Weather disturbed operations throughout the week (3.3 min/flight), followed by capacity/staffing issues (0.9).

Top 10 States

Departures and arrivals

Week 12-18 Aug 2024

See more

No.	Country	Average daily flights	% prev week	% prev year	% 2019
1.	United Kingdom	6,209	-0%	+4%	-6%
2.	Spain	5,794	-2%	+6%	+5%
3.	Germany	5,187	-1%	+3%	-13%
4.	Italy	4,544	-3%	+8%	+6%
5.	France	4,505	-3%	+2%	-2%
6.	Türkiye	3,982	-1%	+0%	+8%
7.	Greece	2,586	-2%	+6%	+15%
8.	Netherlands	1,714	+1%	+2%	-5%
9.	Poland	1,452	-1%	+13%	+14%
10.	Portugal	1,427	-3%	-0%	+7%

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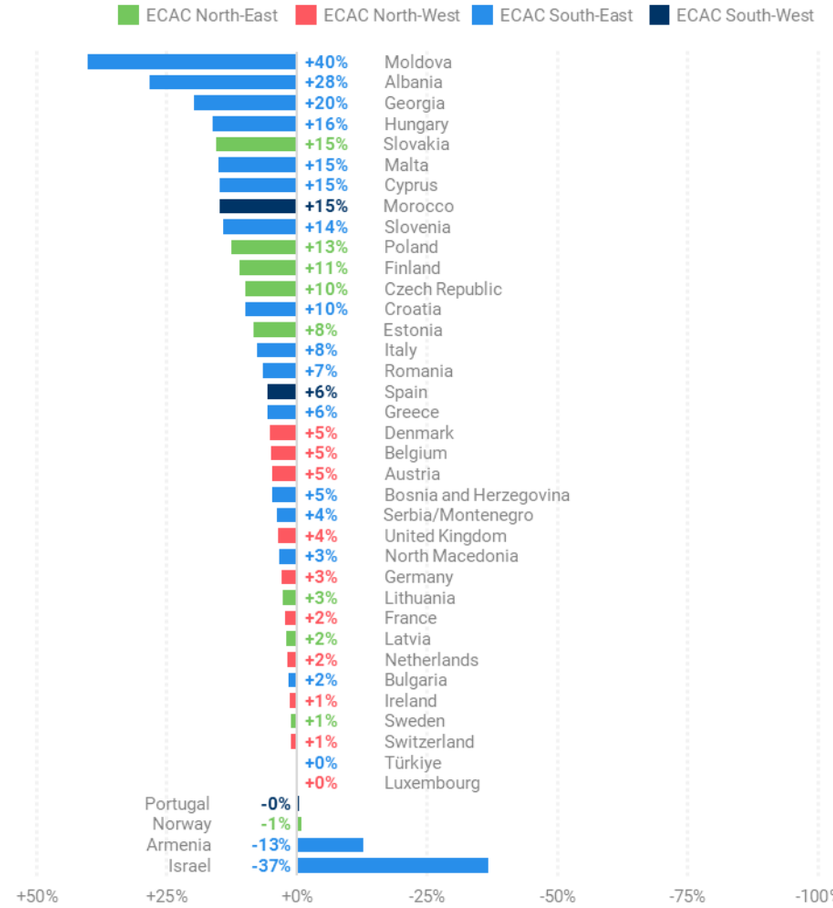
- The top 10 States, in aggregate, recorded 1.7% fewer flights than in the previous week .
- Most States (in the top 10) recorded fewer flights than the previous week, except the Netherlands (+1%).
- Six States in the top 10 recorded traffic above 2019 levels (Spain, Italy, Türkiye, Greece, Poland and Portugal) with an increase of 2 digits for Greece and Poland.
- The highest increase of traffic vs 2019 is for the States in the South-East axis (Moldova, Albania, Georgia, Hungary, Slovakia, Malta, Cyprus and Slovenia) with 2-digit increases.

States in the EUROCONTROL Network

Compared to the equivalent week in 2023

Dep/Arr flights for week 12-18 Aug 2024



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*Based on integrated ANSP

Top 10 aircraft operators

Week 12-18 Aug 2024 (avg daily flights)

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No.	Aircraft operator	Average daily flights	% prev week	% prev year	% 2019
1.	Ryanair Group	3,613	-0%	+8%	+37%
2.	easyJet Group	1,785	-3%	-1%	-6%
3.	Turkish Airlines Group	1,570	-0%	-4%	+5%
4.	Lufthansa Airlines	1,225	-1%	+3%	-18%
5.	Air France Group	1,131	+0%	+5%	-2%
6.	Wizz Air Group	937	+0%	-0%	+37%
7.	KLM Group	926	+0%	+3%	-2%
8.	British Airways Group	872	-0%	+6%	-10%
9.	Vueling	695	-2%	-1%	-6%
10.	SAS Group	642	+1%	-0%	-22%

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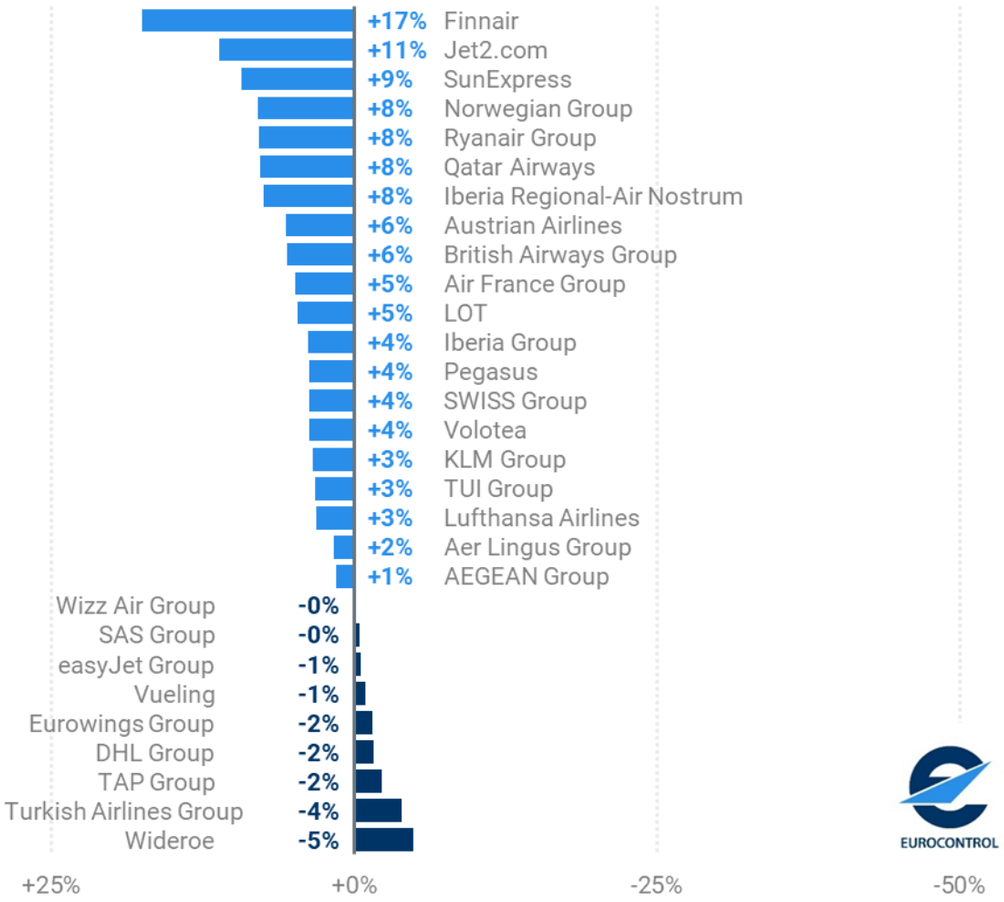
- The top 10 aircraft operators, in aggregate, recorded 0.7% fewer flights than in the previous week
- Most aircraft operators (in the top 10) recorded fewer flights than the previous week, except SAS (+1%). The highest decreases were for easyJet (-3%) and Vueling (-2%).
- Three aircraft operators in the top 10 recorded traffic above 2019 levels (Ryanair, Wizz Air and Turkish Airlines) with increases of 37% for Ryanair and Wizz Air.
- The highest traffic increases vs 2019 are for Finnair (+17%), Jet2.com (+11%), SunExpress (+9%), Norwegian (+8%), Ryanair (+8%), Qatar Airways (+8%) and Iberia Regional-Air Nostrum (+8%).

Aircraft operators in the EUROCONTROL Network

Compared to the equivalent week in 2023

Dep/Arr flights for week 12-18 Aug 2024



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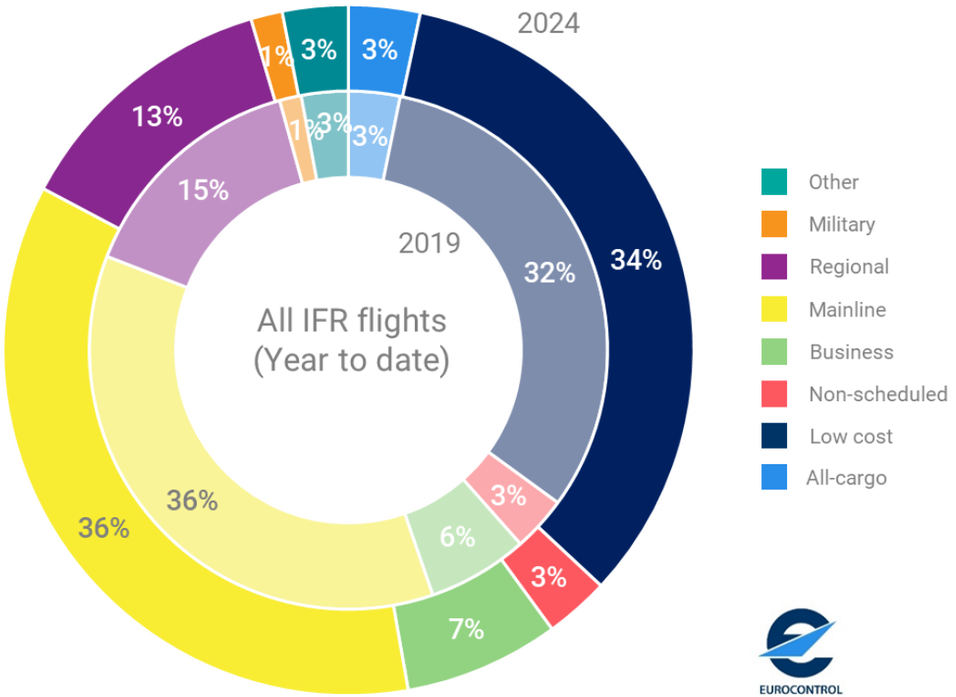
Market segments in the EUROCONTROL Network

Average share of total flights (year to date)

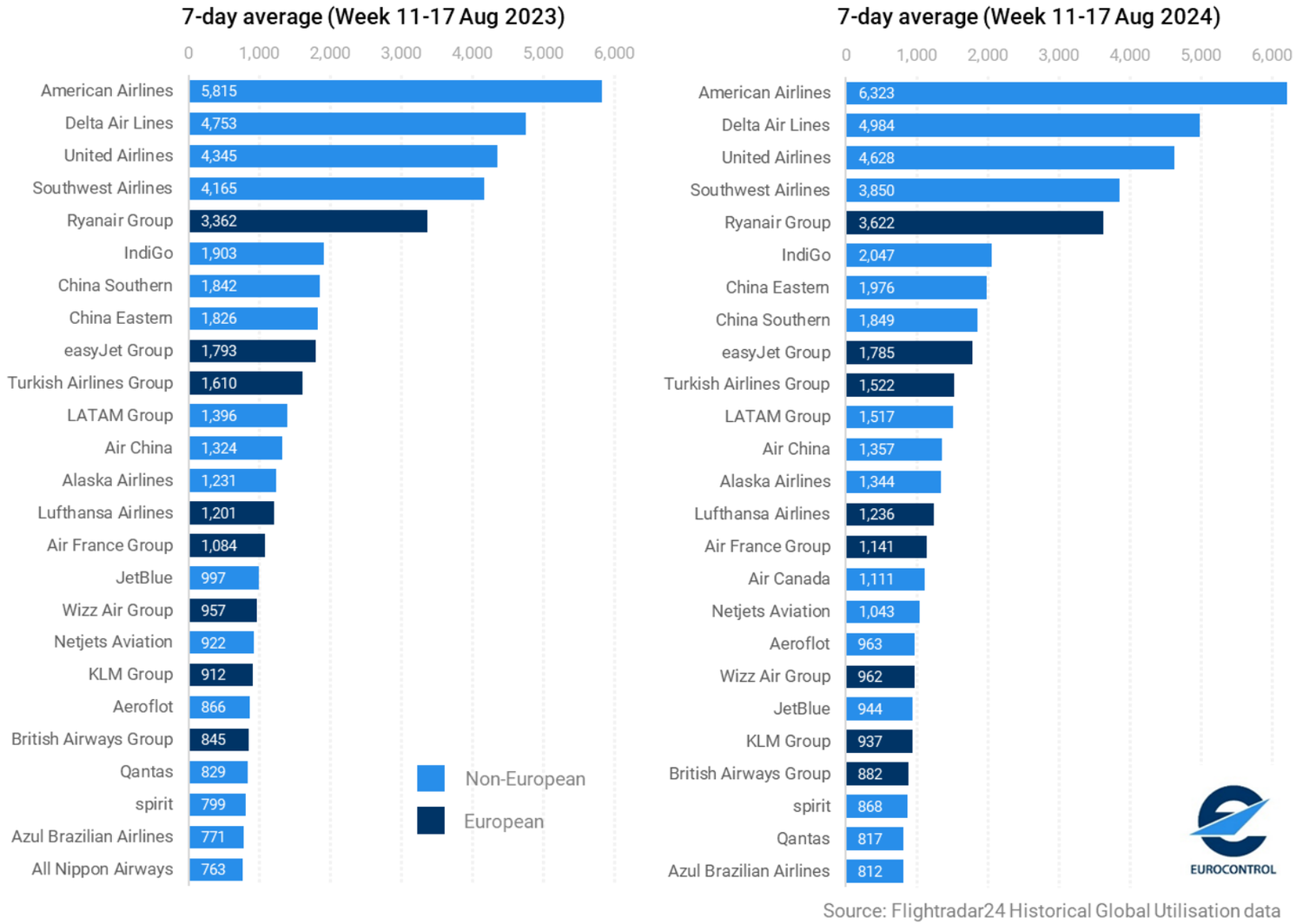


No.	Market segment	Avg. flights	% prev week	% prev year	% 2019
1.	Low Cost	11,975	-1%	+5%	+5%
2.	Mainline	11,901	+0%	+6%	-4%
3.	Regional	4,003	-0%	+3%	-13%
4.	Business	2,248	-5%	+2%	+6%
5.	Non-Scheduled	1,427	-2%	+0%	-25%
6.	All-cargo	927	-4%	+3%	+10%
7.	Other	863	-2%	-5%	-18%
8.	Military	337	-12%	+0%	+9%

- Year-to-date, the largest market segment (Mainline) has a 36% share, similar to the same period in 2019. The second largest segment (Low Cost) is at 34%, up by 2pp 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.
- Over the previous week, all passenger flight numbers have recorded stable or negative growth rates: Non-scheduled (-2%), Low Cost (-1%), Regional (-0%) and Mainline (+0%). All-cargo is down (-4%).
- Four market segments are recording flights above 2019 levels: All-cargo (+10%), Military (+9%), Business (+6%) and Low Cost (+5%). Mainline recorded -4% while Regional and Non-Scheduled recorded 2-digit decreases (respectively -13% and -25%).

Top 25 global aircraft operators

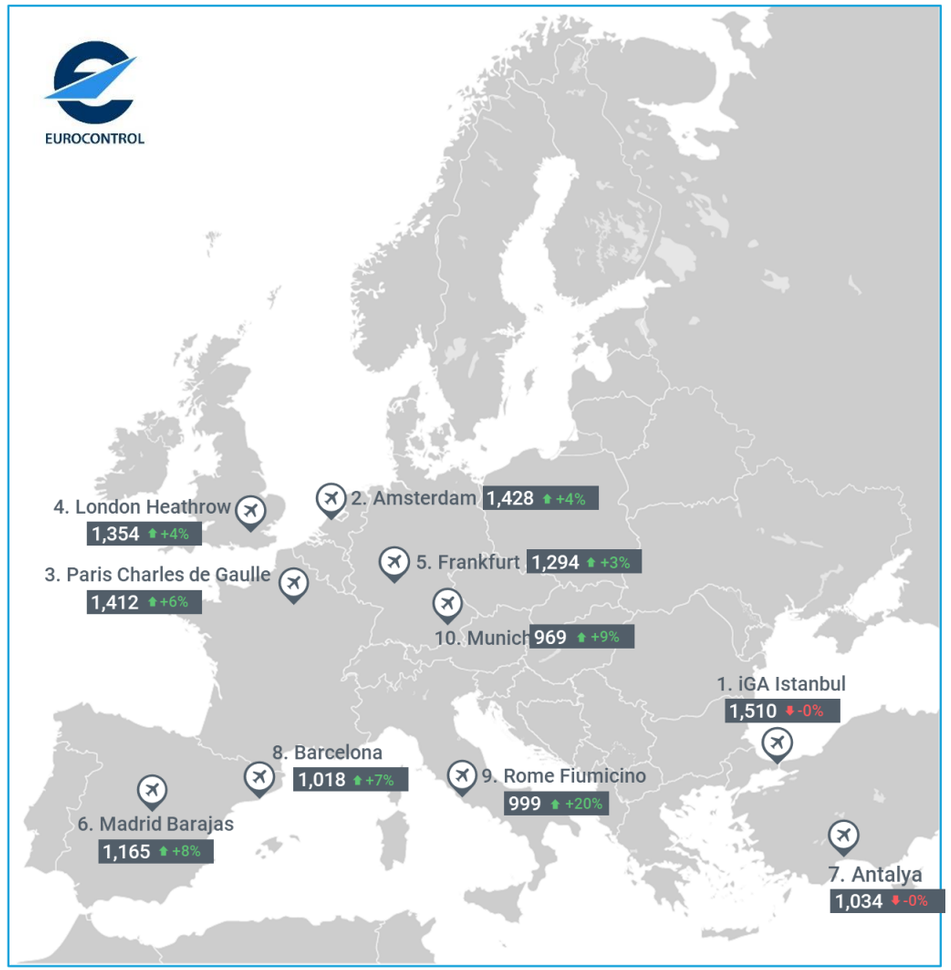
(average daily departure flights)



Source: Flightradar24 Historical Global Utilisation data

- Over the last week, eight European airlines are ranked in the top 25 global aircraft operators.
- This situation is broadly similar to the same week last year.
- 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: easyJet Group (9th position), Turkish Airlines Group (10th), Lufthansa Airlines (14th), Air France Group (15th), Wizz Air Group (19th), KLM Group (21st) and British Airways Group (22nd).

Top 10 airports



Airport ranking

Week 12-18 Aug 2024

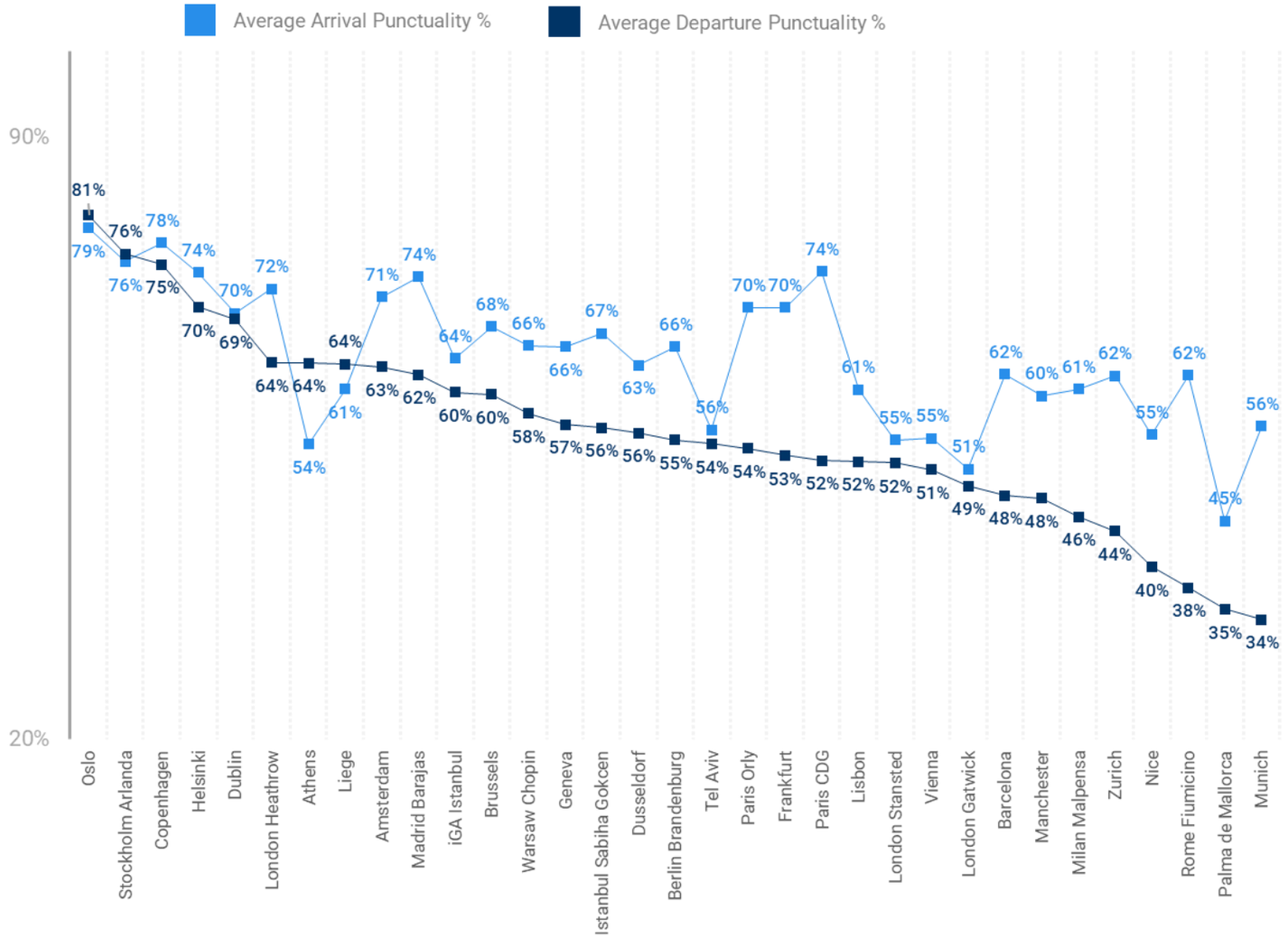
See more

No.	Airport	Avg. daily dep/arr flights	% prev week	% prev year	% 2019
1.	iGA Istanbul	1,510	+0%	-0%	+15%
2.	Amsterdam	1,428	+0%	+4%	-4%
3.	Paris Charles de Gaulle	1,412	-2%	+6%	-6%
4.	London Heathrow	1,354	+0%	+4%	-1%
5.	Frankfurt	1,294	-1%	+3%	-13%
6.	Madrid Barajas	1,165	-1%	+8%	-2%
7.	Antalya	1,034	-1%	-0%	+7%
8.	Barcelona	1,018	-2%	+7%	-4%
9.	Rome Fiumicino	999	-1%	+20%	+3%
10.	Munich	969	-2%	+9%	-15%

- Compared to the previous edition, Amsterdam swapped places with Parsi CDG, Antalya swapped places with Barcelona and Palma left the top 10.
- iGA Istanbul (1,510 flights per day, +0% vs previous week) remained the busiest airport followed by Amsterdam (1,428, +0%) and Paris CDG (1,412, -2%).
- Most airports (from the top 10) recorded higher flights than in 2023 with notably 20% more for Rome Fiumicino.
- Three of the top 10 airports (iGA Istanbul, Antalya and Rome) are currently handling traffic above their 2019 levels (respectively +15%, +7% and +3%).

Average arr/dep punctuality at main airports

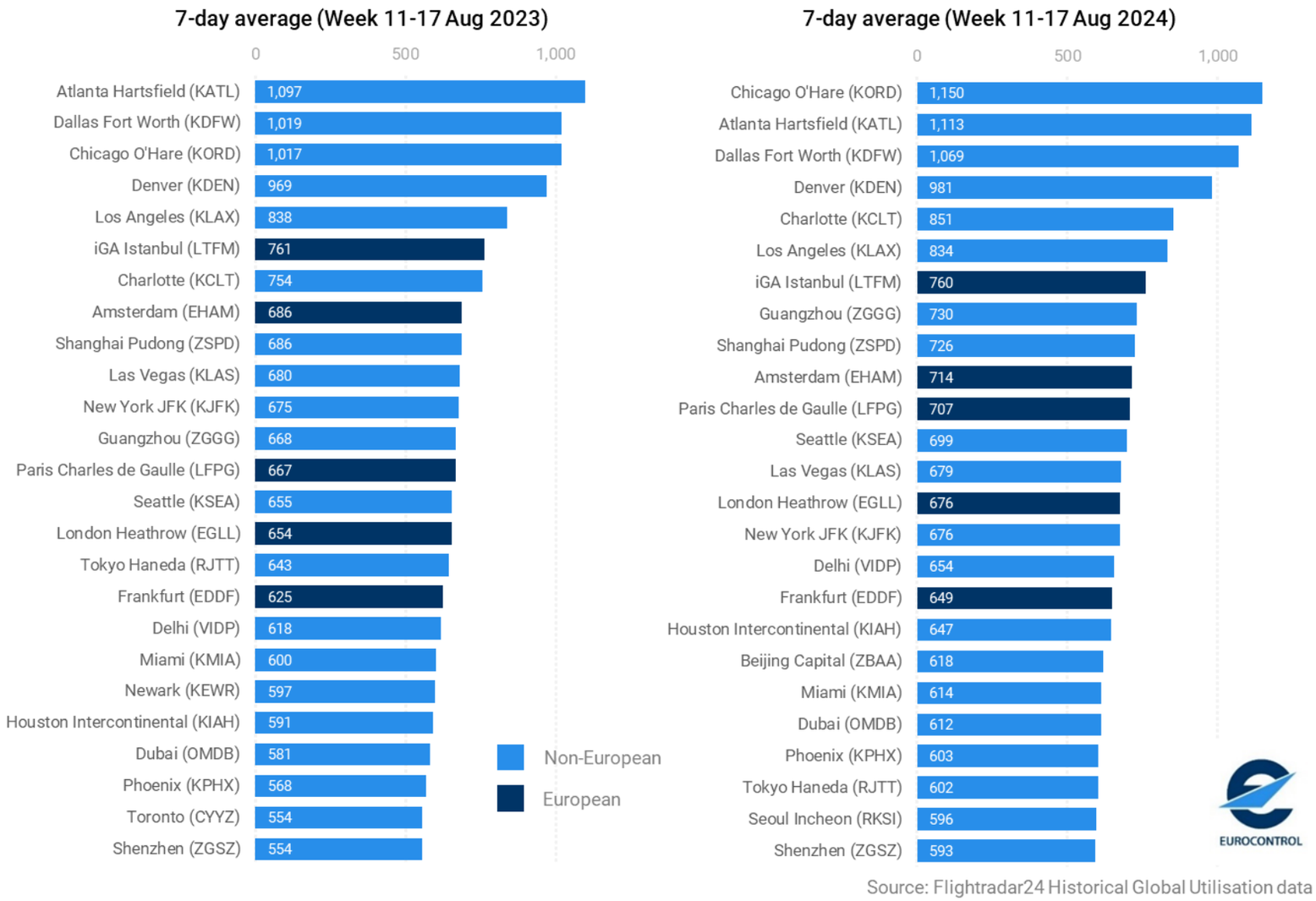
(Week 12-18 Aug 2024)



- Overall, arrival punctuality at Network level was 64.6% last week, significantly worse than in 2023 (70.0%) and in 2019 (76.5%).
- Similarly, departure punctuality was at 56.0% last week, significantly lower than in 2023 (61.5%) and in 2019 (69.1%).
- Arrival punctuality is higher (i.e. better) than departure punctuality at most airports.
- However, a few airports (Oslo, Stockholm, London Heathrow and Athens) have higher departure punctuality than arrival punctuality, which indicates that these airports have been able to absorb delays.

Top 25 global airport departures

(average daily departure flights)



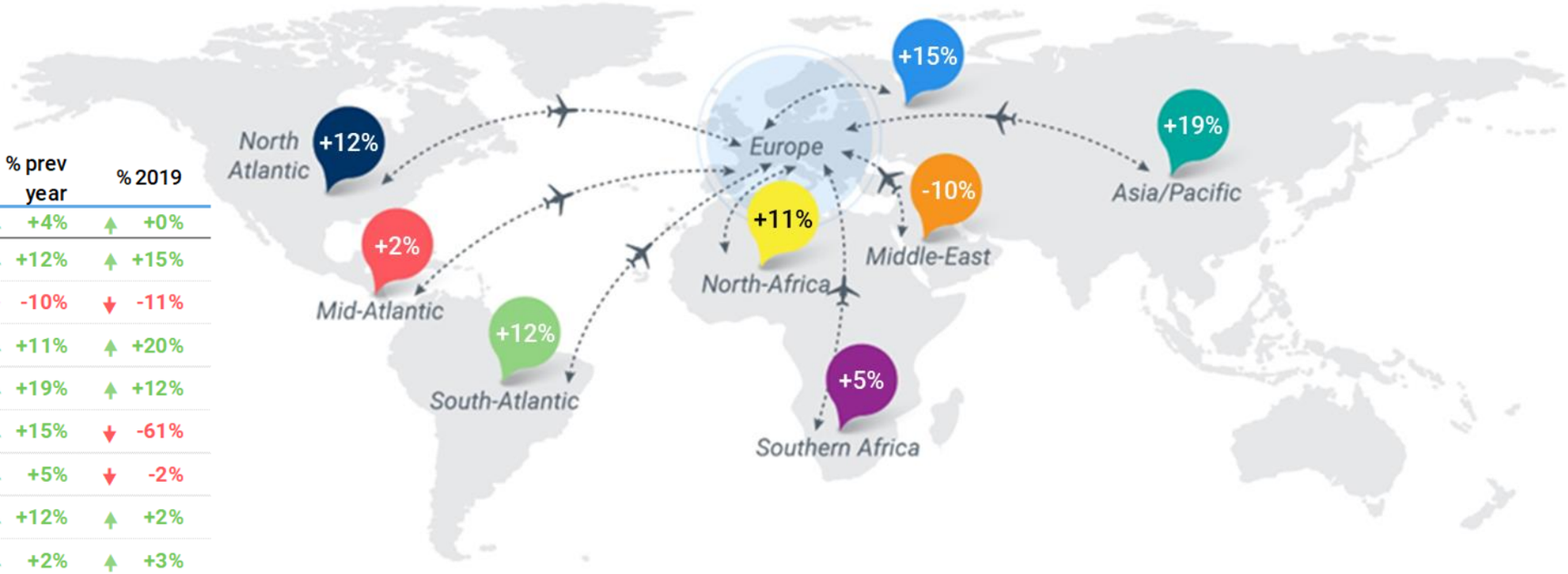
Source: Flightradar24 Historical Global Utilisation data

- Over the last week, five European airports appear in the top 25 of global airport departures (similar to the corresponding week in 2023).
- This situation is broadly similar to the same week last year.
- There are three European airports in the top 11 with iGA Istanbul (7th), Amsterdam (10th) and Paris CDG (11th).
- The other two European airports in the top 25 are London Heathrow (14th) and Frankfurt (17th).
- There are now two Asian airports in the top 10 – Guangzhou (8th) and Shanghai (9th).

Traffic flows

(average daily departure/arrival flights for week 12-18 Aug 2024)

Region	Average daily flights	% prev week	% prev year	% 2019
Intra-Europe	**26,033**	-1%	+4%	+0%
Europe ↔ North Atlantic	1,637	-0%	+12%	+15%
Europe ↔ Middle-East	1,575	+1%	-10%	-11%
Europe ↔ North-Africa	1,472	+0%	+11%	+20%
Europe ↔ Asia/Pacific	926	-0%	+19%	+12%
Europe ↔ Other Europe	513	+2%	+15%	-61%
Europe ↔ Southern Africa	303	-2%	+5%	-2%
Europe ↔ South-Atlantic	200	-0%	+12%	+2%
Europe ↔ Mid-Atlantic	177	+0%	+2%	+3%
Non Intra-Europe	**6,803**	+0.2%	+6%	-6%



- The main traffic flow - intra-European - recorded 26,033 daily flights last week, 1% lower than the previous week. Intercontinental flows amounted to 6,803 daily flights on average, slightly above (+0.2%) the previous week.
- The second-largest flow is with North America, with 1,637 flights per day (stable compared to the previous week), the third is with the Middle East with 1,575 average daily flights (1% increase compared to the previous week) and the fourth is with North Africa, with 1,472 daily flights (stable compared to 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 19% above the same week in 2023 and 11% above 2019 levels.
- Five regional flows are above 2019 level, notably North Africa (+20%), North Atlantic (+15%) and Asia/Pacific (+12%),

Top 10 long-haul country pairs

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

Week 12-18 Aug 2024

No.	Country pair	Average daily flights	% prev week	% prev year	% 2019
1.	UK ↔ US	331	+2%	+1%	+3%
2.	Germany ↔ US	175	-0%	-1%	+1%
3.	France ↔ US	156	-6%	+12%	+21%
4.	Italy ↔ US	106	-4%	+10%	+24%
5.	Netherlands ↔ US	82	+3%	+7%	-5%
6.	Spain ↔ US	82	+1%	+12%	+5%
7.	Ireland ↔ US	76	-3%	+2%	+6%
8.	UAE ↔ UK	63	+3%	+11%	-6%
9.	Iceland ↔ US	54	+0%	n.a	n.a
10.	Canada ↔ UK	51	+1%	+2%	-11%

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- 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 UAE ↔ UK and Canada ↔ UK.
- Six long-haul flow posted increase on the previous week, notably Netherlands ↔ US (+3%), UAE ↔ UK (+3%) and UK ↔ US (+2%).
- All but one of the top long-haul flows recorded positive growth rate vs 2023, notably France ↔ US (+12%), Spain ↔ US (+12%), UAE ↔ UK (+11%) and Italy ↔ US (+10%).
- Seven flows are currently at or above 2019 levels, notably Italy ↔ US (+24%) and France ↔ US (+21%).

Economics

Week 12-18 Aug 2024

16 Aug 2024
avg fuel price:

$2.33 /gallon

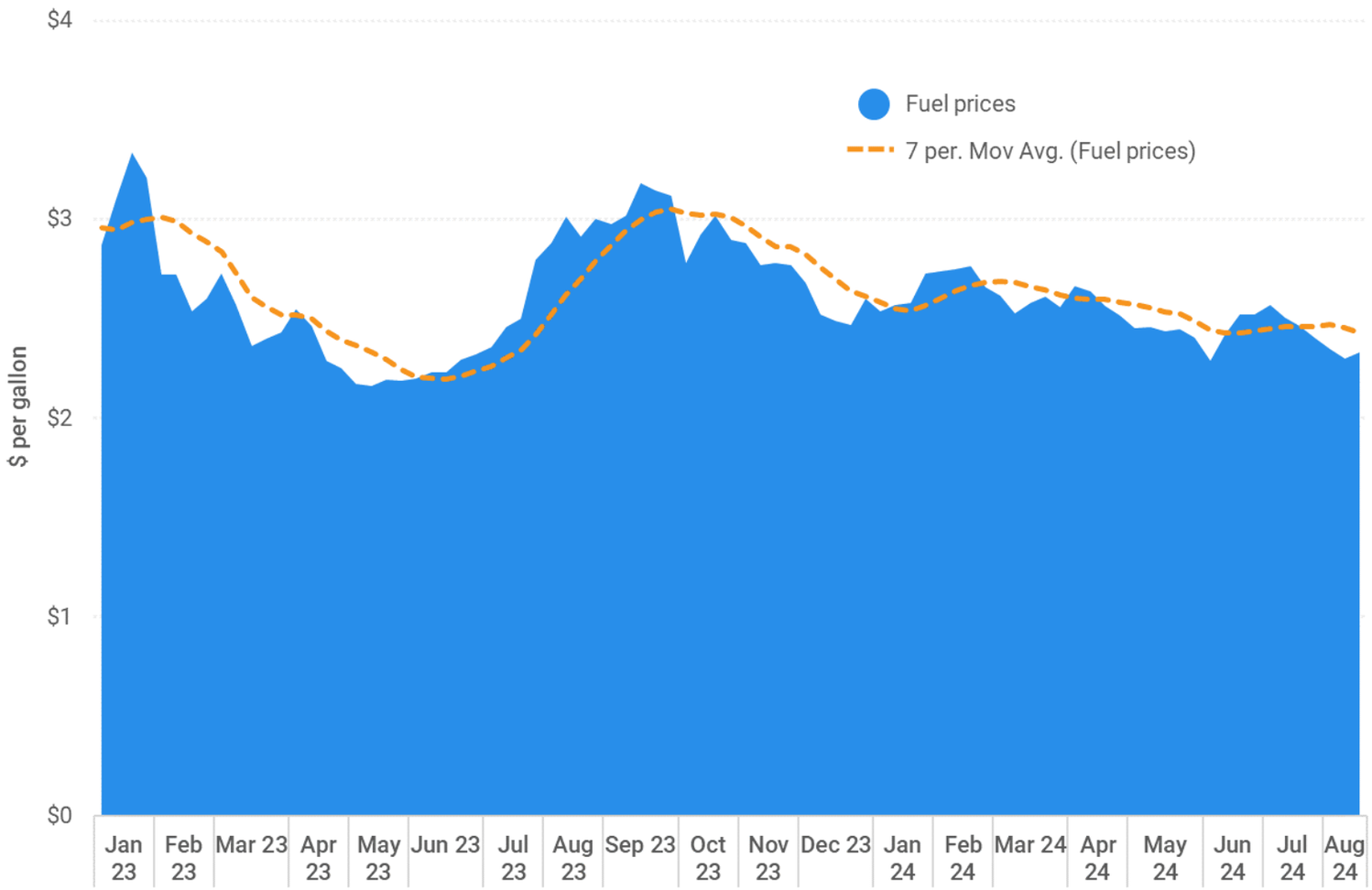
-1%

vs. $2.35 /gallon
on 02 Aug 2024

Source: IATA/Platts

- The average price of jet fuel stood at 2.33 USD/gallon on 16 August 2024, a 1% decrease compared to the level of two weeks ago.
- Since September 2023, the 7-day average fuel price is globally decreasing , except an increase in January 2024 and another one in 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 Q3 2024.

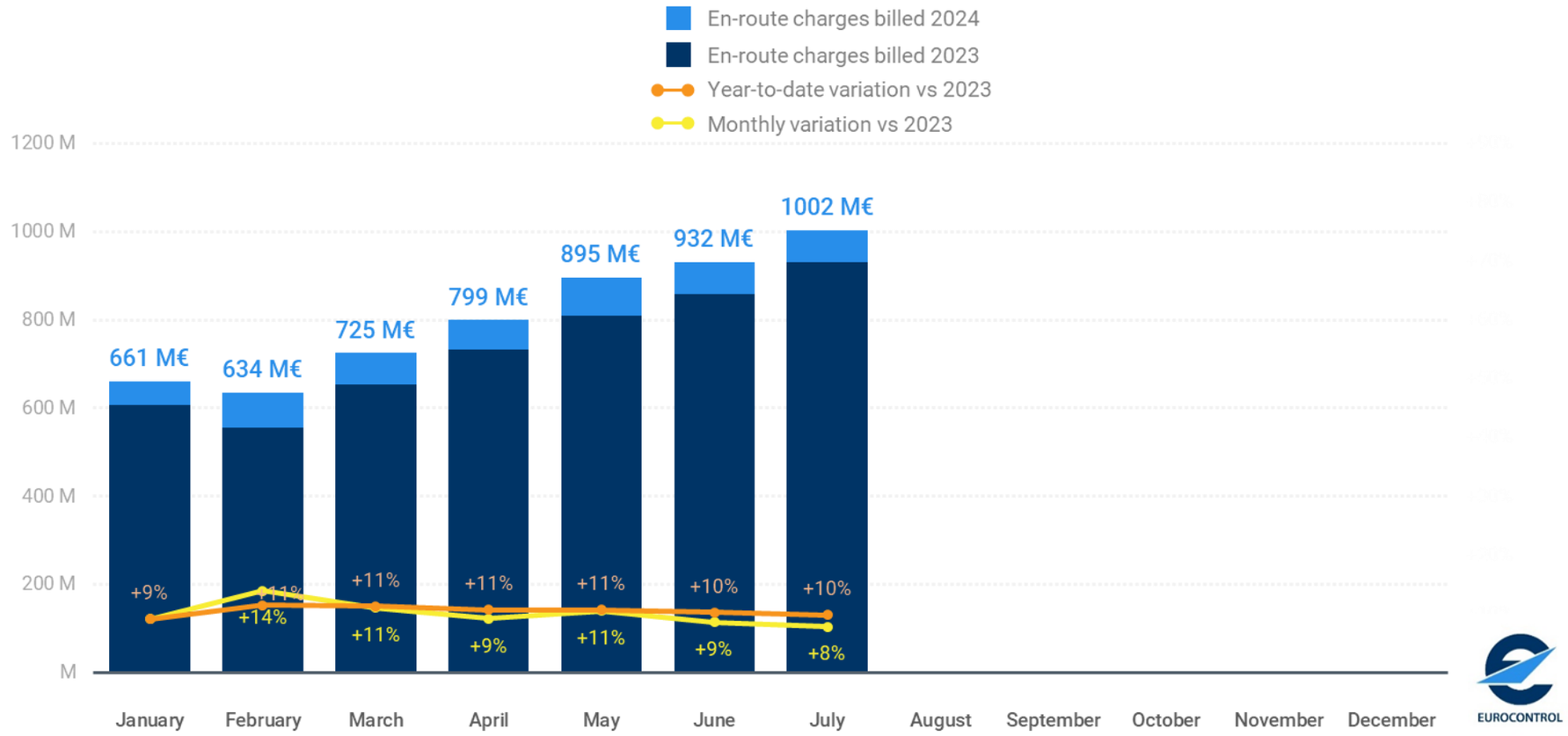
Jet fuel price (Europe)



Source: IATA/Platts

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

Year-to-date amount billed: 5,647 M€ (+10% vs 2023)



- At Network level, 1,002M€ were billed in July 2024 which represents +8% 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 July 2024 variation vs July 2023 (+8%) is explained by an increase in Unit Rates (+3%) and an increase in total en-route Service Units (+6%).
- On a year-to-date basis, EUROCONTROL has billed 5,647M€, which is 10% higher than in 2023 and 25% higher than in 2019.

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