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EUROPEAN AVIATION OVERVIEW

29 Jan - 04 Feb 2024

Wednesday 07 February 2024

Headlines

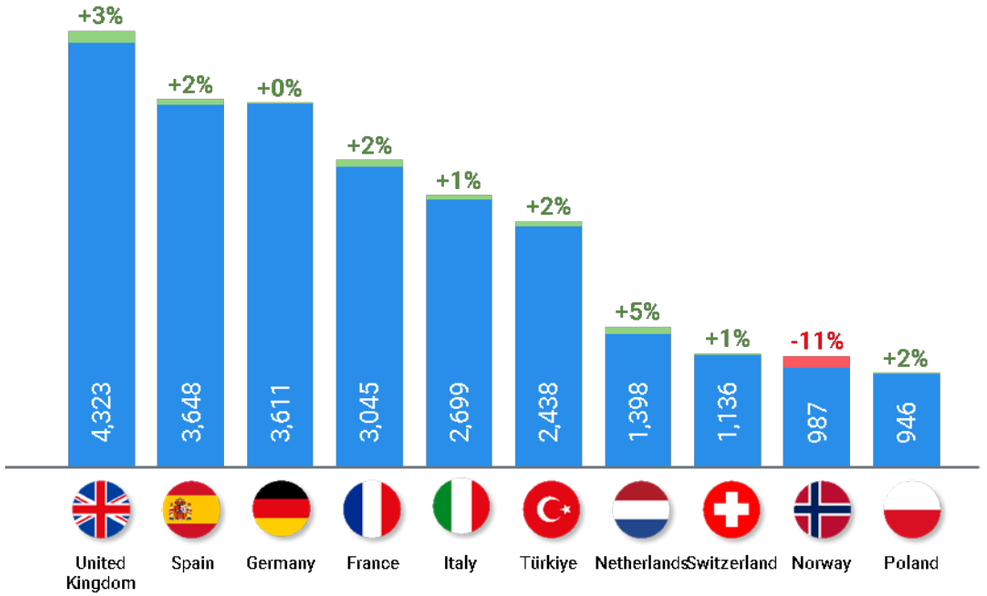
(Week 29 Jan - 04 Feb 2024)

- The Network recorded 22,714 average daily flights (+4% vs 2023). The average number of flights was less than 1% higher than in the previous week.
- In January, the number of flights in the network was at 90% of 2019 levels.
- On average, the top 10 carriers increased their capacities by 1.8% compared to the previous week.
- En-route ATFM delays averaged just above 9,000 minutes per day (0.40 min/flight); over half of this related to a French trial of their planned 4Flight system.
- Arrival and departure punctuality, at 82.8% and 77.7% respectively, were 5.7/5.1 percentage points above the 2019 levels, and also higher than the equivalent week in 2023.
- The average jet fuel price stood at 2.74 USD/gallon on 02 February 2024, a 6.5% increase compared to two weeks ago.
- EUROCONTROL billed 9,102M€ in en-route charges for 2023 flights, 20% above the amount billed for 2022 flights, reflecting more service units and higher unit rates.

Top 10 busiest States

On week 29 Jan - 04 Feb 2024

(all flights excl. overflights compared with previous week)



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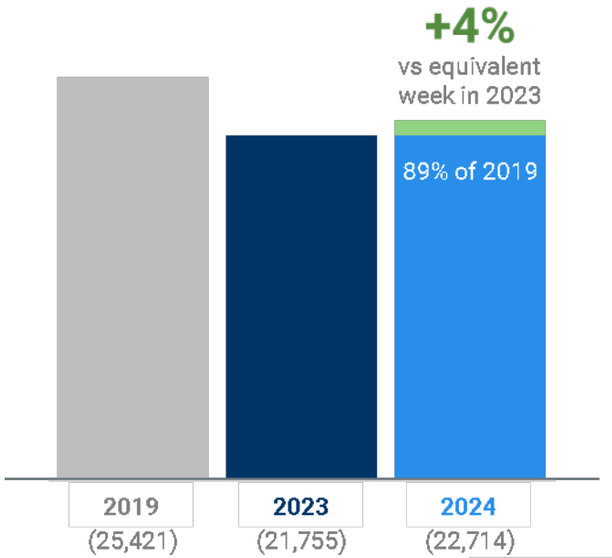
Traffic situation

Average daily flights (including overflights)

Week 29 Jan - 04 Feb 2024



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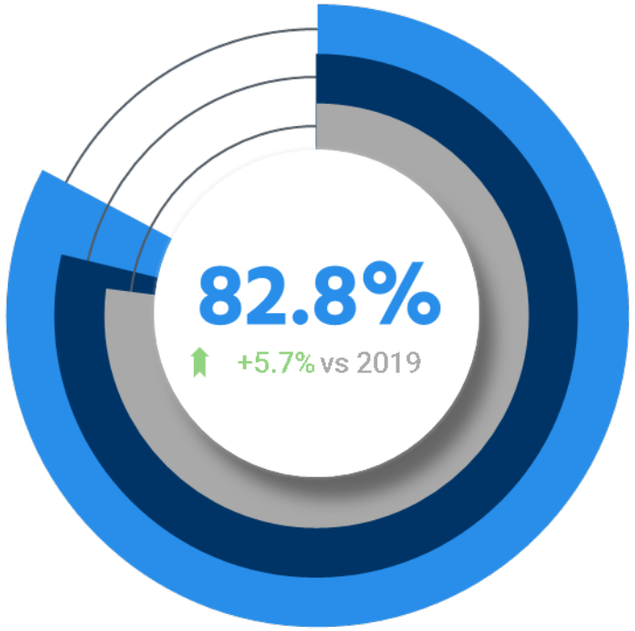
Arrival & departure punctuality

(all network scheduled flights)

Week 29 Jan - 04 Feb 2024

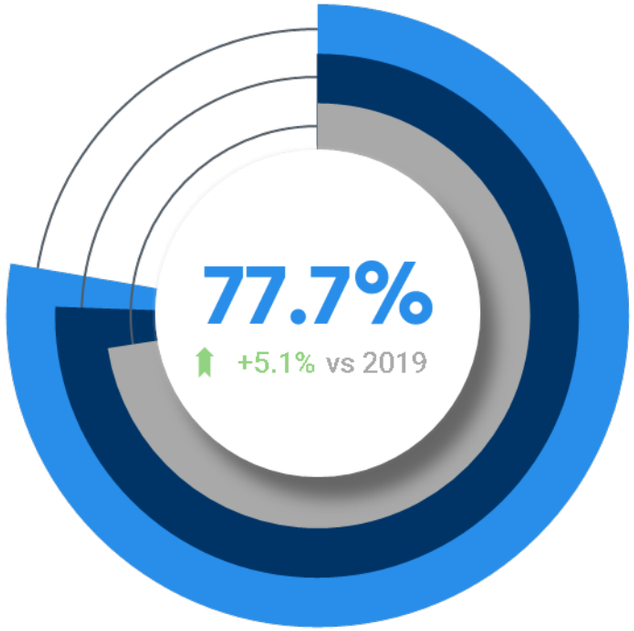
ARRIVAL PUNCTUALITY



77.0% _____ in 2019

78.8% _____ in 2023

DEPARTURE PUNCTUALITY



72.6% _____ in 2019

75.5% _____ in 2023

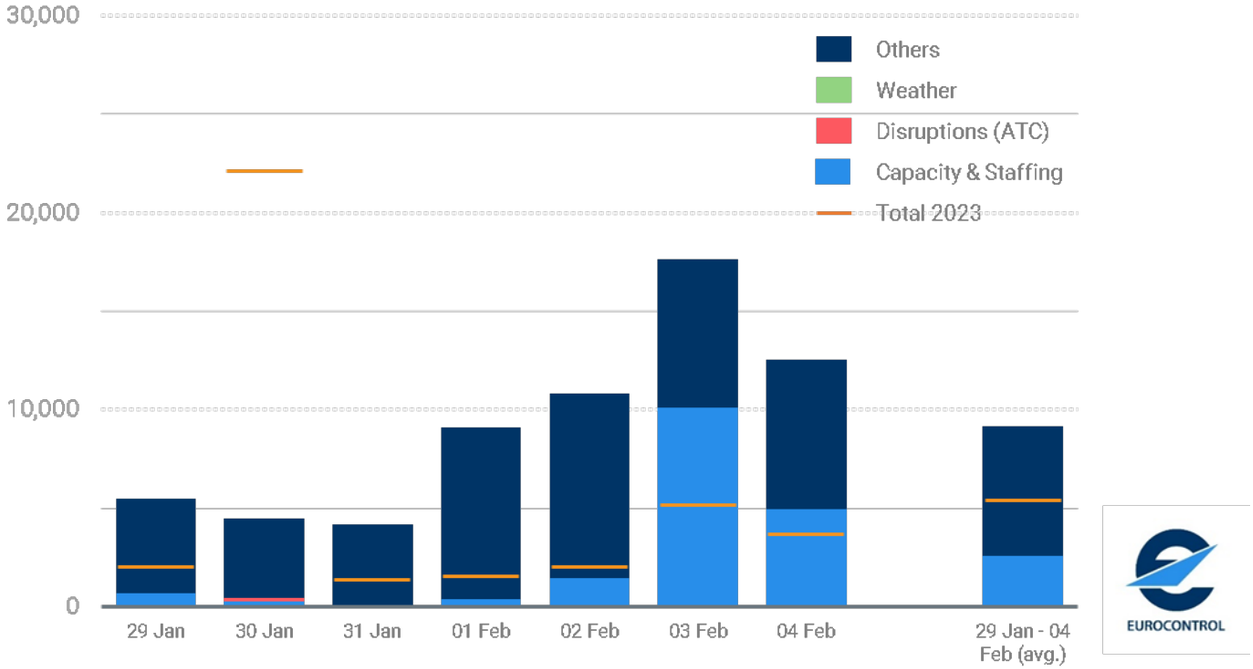
The pictures show the share of flights arriving/departing no later than 15 minutes after/before the scheduled time (OTP15).

- Network punctuality in week 4 (2024) improved on 2023, while the number flights is slightly higher than a year ago (+4%).
- Network punctuality in week 4 also improved when compared to the equivalent week in 2019; arrival punctuality was up by 5.7 percentage points to 82.8% and departure punctuality improved by 5.1 percentage points to 77.7%.
- Seasonal weather (snow and low visibility) was the main cause of delays in the network in the week of 29 January – 04 February. Storm Ingunn affected Norway on 02 February. IGA Istanbul saw delays due to thunderstorm activity on 29 January. London Heathrow and Amsterdam Schiphol experienced high winds, notably on 04 February. Regarding en-route delay, the main cause during the week was 4-Flight Live trials in Paris ACC with regulations applied every day of the week.
- There was also industrial action in Germany (by airport security staff) and in Finland.

En-route ATFM delays

Delays per cause (EUROCONTROL Area)

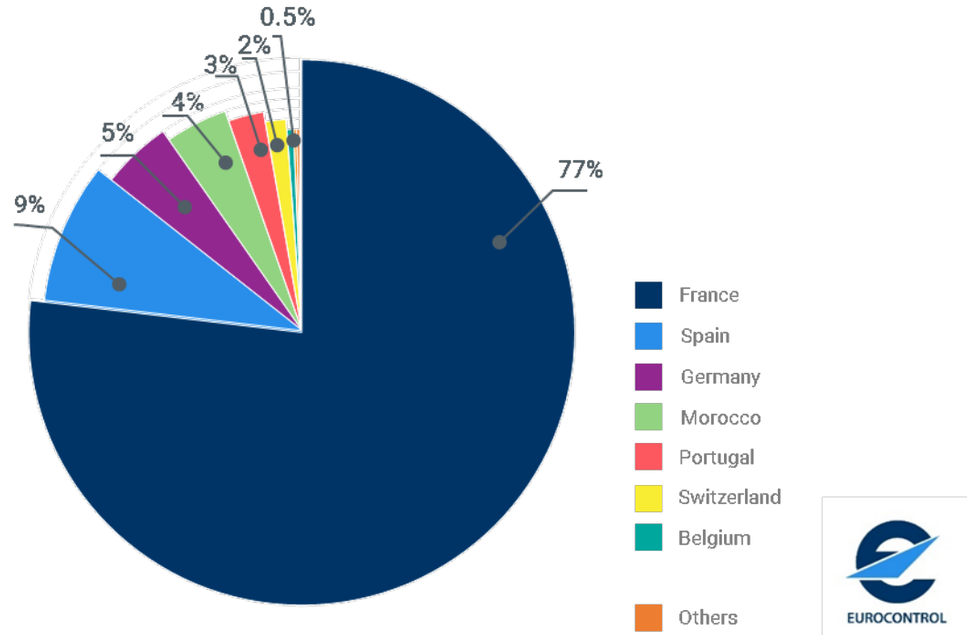
In minutes (total daily and 7-day average) in 2024



- During the week of 29 January – 04 February, en-route ATFM delays were above 2023 levels on most days. On a 7-day average (last bar on the right), the week registered delays 68% higher than in the comparable week in 2023.
- On average, they amounted to 9,179 minutes a day, with the main cause being Others (72%), especially related to the ongoing Paris ACC trial of the 4-Flight system (some sectors operating with a reduced capacity and some routes off-loaded). The second main cause was Capacity & Staffing (28%), notably experienced in Morocco and Spain during the weekend due to strong overflight traffic demand.

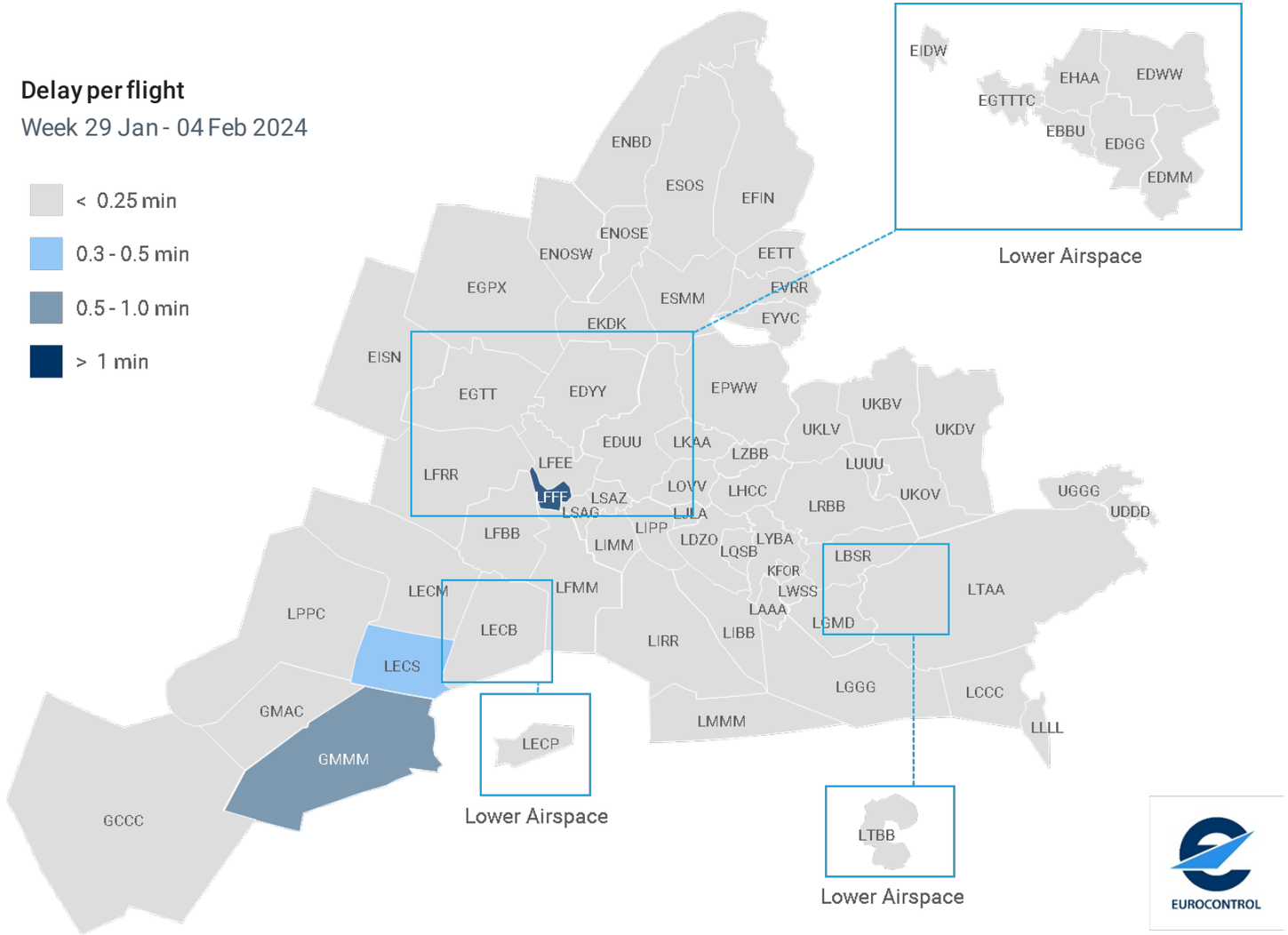
Share of en-route ATFM delays

Week 29 Jan - 04 Feb 2024



- France accounted for 77% of all en-route ATFM delays, owing to system implementation (Paris ACC, 4-flight system trial, the trial has been ended on Tuesday 06 February).
- Spain came second with 9% of all en-route ATFM delays, due to strong overflight traffic demand (Seville).
- Germany came third with 5% of all en-route ATFM delays.

En-route ATFM delayed flights per Area Control Centre



- Over the last week, en-route ATFM delays have increased by 65% compared to the week before (9,179 minutes per day, on average).
- Compared to the same week in 2023, en-route ATFM delays were 68% higher.
- Last week, the most affected ACCs were:
- Paris (2.7 min/flight), mainly due to the trials for the future system implementation (4-Flight) with planned sector capacity reductions, reduced demand (cancellations) and mandatory off-loaded routes.
- Casablanca (0.6 min/flight), mainly due to some ATC capacity delay at the weekend due to strong overflight traffic demand,
- Seville (0.5 min/flight), also due to some ATC Capacity delay at the weekend due to strong overflight traffic demand.

Top 10 States

Departures and arrivals

Week 29 Jan - 04 Feb 2024

See more

No.	Country	Average daily flights	% prev week	% prev year	% 2019
1.	United Kingdom	4,323	+3%	+5%	-11%
2.	Spain	3,648	+2%	+7%	+4%
3.	Germany	3,611	+0%	+6%	-27%
4.	France	3,045	+2%	-4%	-13%
5.	Italy	2,699	+1%	+8%	-3%
6.	Türkiye	2,438	+2%	+11%	+9%
7.	Netherlands	1,398	+5%	+15%	-3%
8.	Switzerland	1,136	+1%	+7%	-7%
9.	Norway	987	-11%	-14%	-24%
10.	Poland	946	+2%	+13%	-0%

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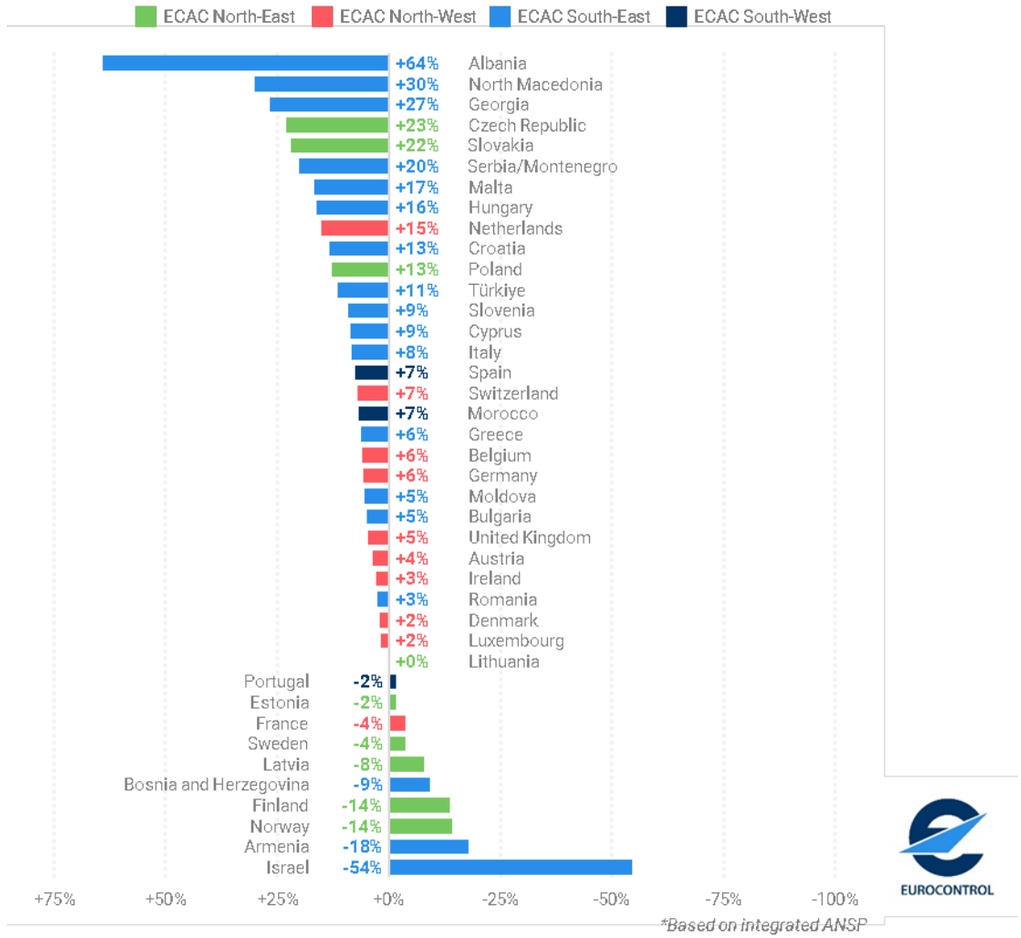
- The top 10 States, in aggregate, recorded more flights compared to the previous week (+1.3%).
- Compared to the EAO 2023 annual edition: Greece is not in the top 10 this week but Poland entered it.
- All States recorded more flights compared to the previous week, except Norway which saw a reduction in its domestic flights.
- Two States within the top 10 are recording traffic above 2019 (Spain and Türkiye). Poland is currently in line with its 2019 volumes (arrivals/departures). The seven remaining States are still between 27% and 3% below pre-COVID levels.
- The number of flights to/from Albania is recording record growth rates (+64%) compared to last year thanks to the expansion of Wizz Air flows out of/into Tirana.
- Israel recorded 54% fewer flights compared to the same week in 2023.

States in the EUROCONTROL Network

Compared to the equivalent week in 2023

Dep/Arr flights for week 29 Jan - 04 Feb 2024



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*Based on integrated ANSP

Top 10 aircraft operators

Week 29 Jan - 04 Feb 2024 (avg daily flights)

See more

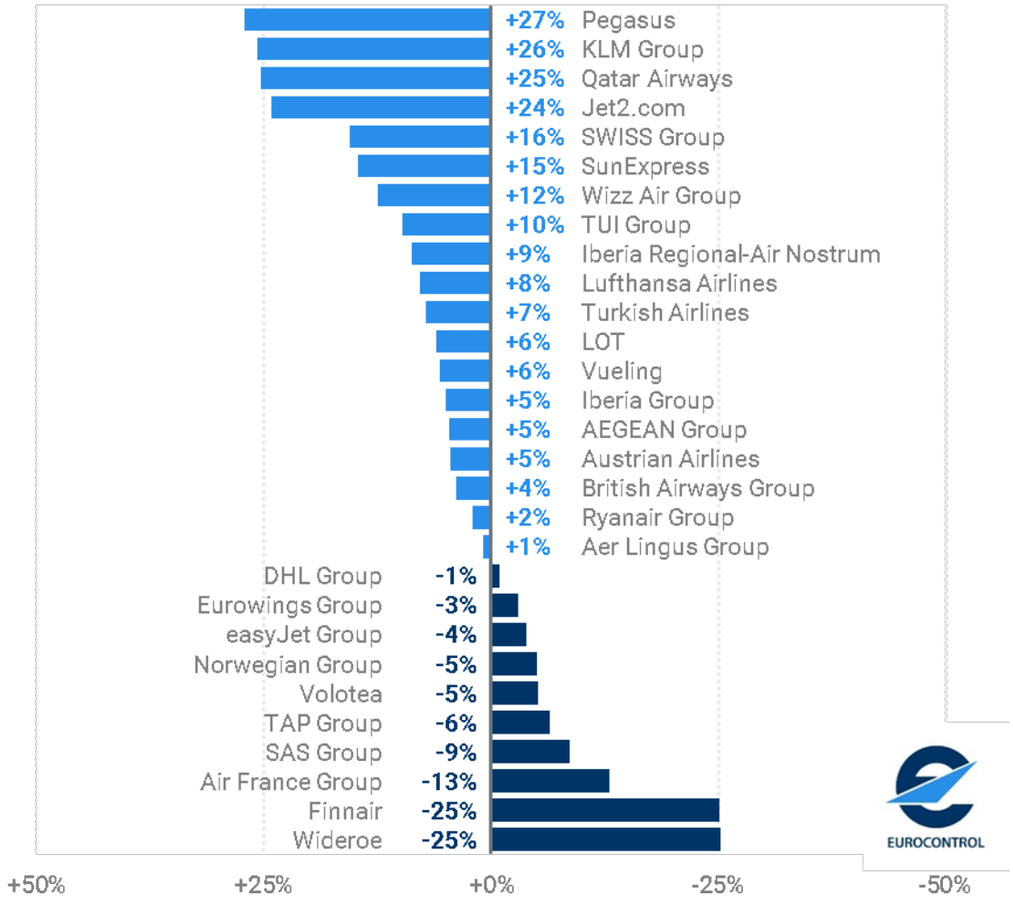
No.	Aircraft operator	Average daily flights	% prev week	% prev year	% 2019
1.	Ryanair Group	2,221	-2%	+2%	+16%
2.	Turkish Airlines	1,337	+0%	+7%	+4%
3.	Lufthansa Airlines	988	+1%	+8%	-28%
4.	easyJet Group	868	+10%	-4%	-29%
5.	British Airways Group	772	+4%	+4%	-6%
6.	KLM Group	759	+8%	+26%	+7%
7.	Air France Group	749	-1%	-13%	-32%
8.	Wizz Air Group	740	-1%	+12%	+59%
9.	SAS Group	498	+3%	-9%	-30%
10.	Vueling	490	+4%	+6%	+7%

- The top 10 aircraft operators posted an increase in the number of flights (1.8% on average) compared to the previous week, mainly owing to easyJet and KLM expanding their operations.
- Main increases were between North-Western countries (Netherlands ↔ UK, Germany ↔ UK and France ↔ Netherlands) as well as between North and South (Italy ↔ UK, France ↔ Italy, UK ↔ Spain and Italy ↔ Netherlands).
- Last week, five airlines within the top 10 had flight numbers above 2019 levels: +59% (Wizz Air Group), +16% (Ryanair Group), +7% (KLM Group, Vueling), +4% (Turkish Airlines).

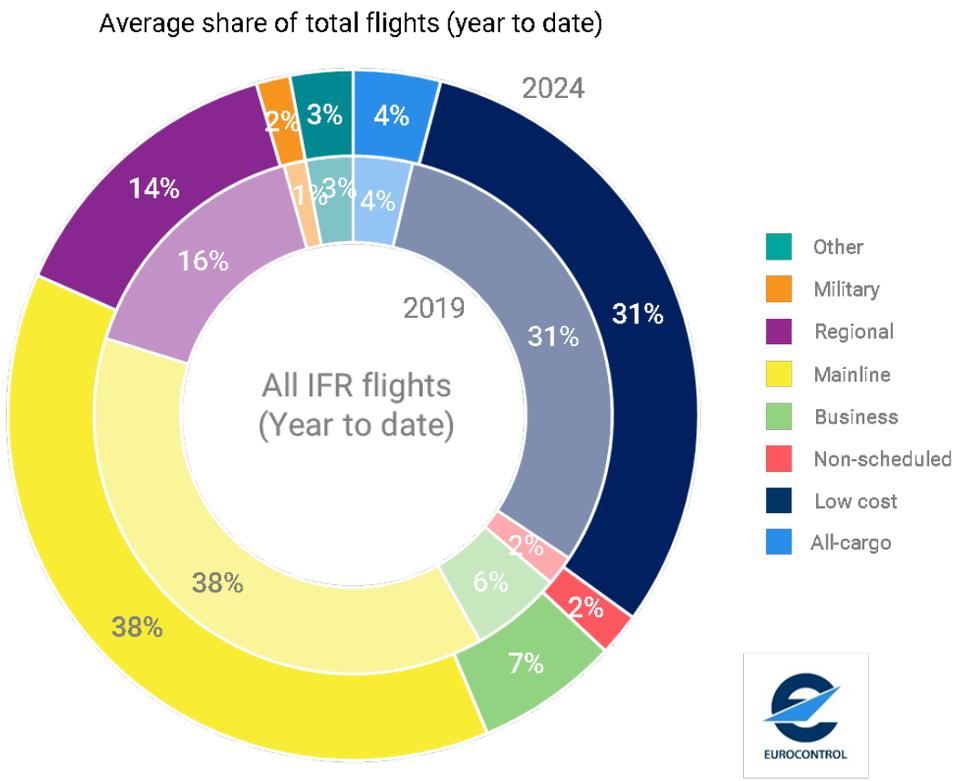
Aircraft operators in the EUROCONTROL Network

Compared to the equivalent week in 2023

Dep/Arr flights for week 29 Jan - 04 Feb 2024



Market segments in the EUROCONTROL Network

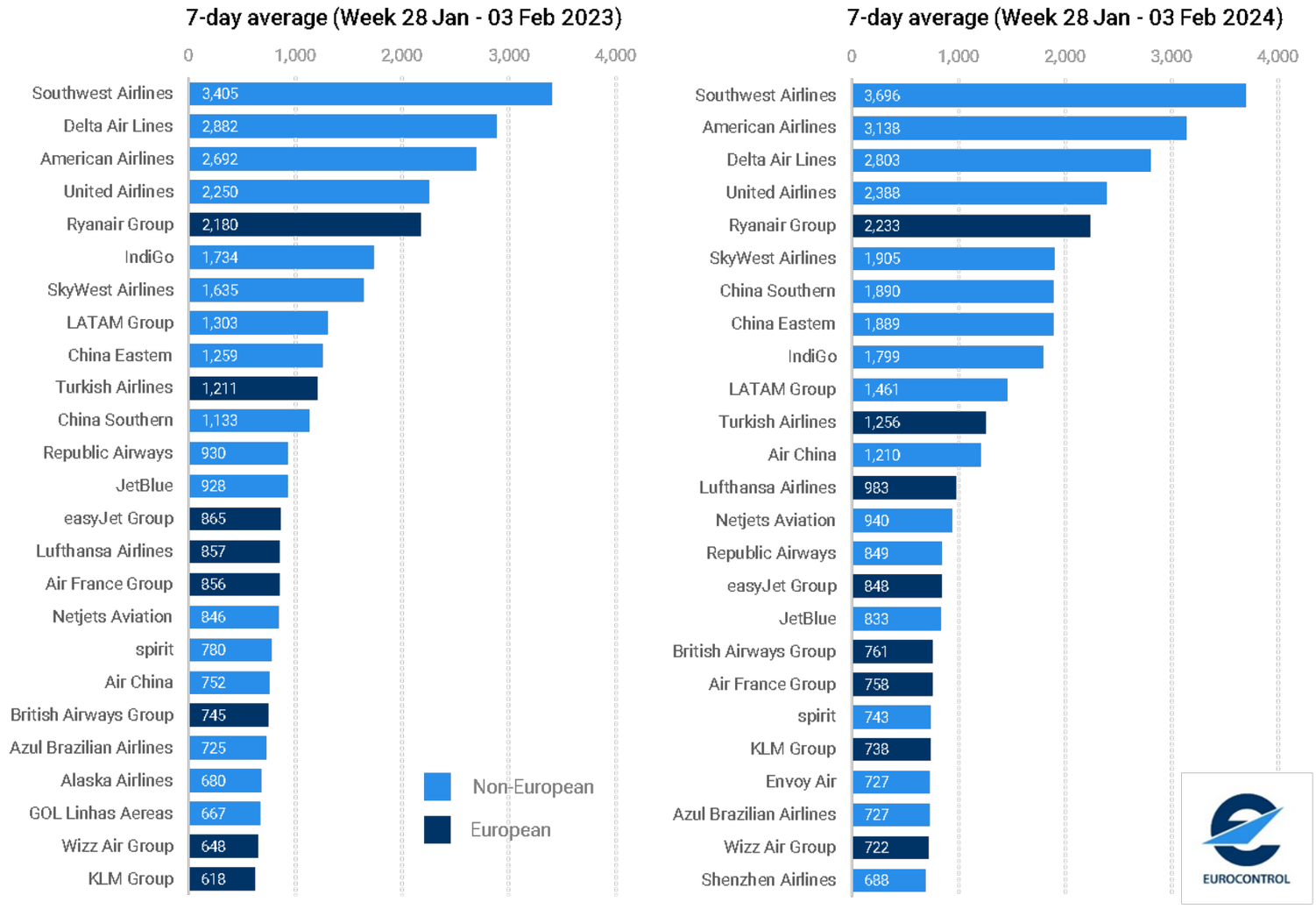


No.	Market segment	Avg. flights	% prev week	% prev year	% 2019
1.	Mainline	8,565	+1%	+7%	-6%
2.	Low Cost	6,674	+1%	+6%	-3%
3.	Regional	3,142	-3%	-3%	-12%
4.	Business	1,608	+0%	+3%	+18%
5.	All-cargo	983	-1%	-3%	+13%
6.	Other	850	+6%	+11%	+12%
7.	Non-Scheduled	462	+9%	+2%	-3%
8.	Military	434	+6%	+8%	+8%

- Most of the market segments (Mainline, Low cost, Non-scheduled, All-cargo) recorded the same market shares in 2024 (year-to-date) as in 2019 (comparable period). The Regional market share slightly reduced (-2 pp) while the Business Aviation and Military market shares slightly expanded (+1 pp each).
- Compared to 2023, passenger markets recorded growth in the number of flights operated: Mainline (+7%), Low cost (+6%), Non scheduled (+2%) as well as Business aviation (+3%).
- On the other hand, Regional (-3%) is now recording fewer flights in 2024 compared to 2023 levels (due to reduction in domestic flights in Norway, France as well as fewer flights Türkiye ↔ Russian Federation). Similarly, All-cargo (-3%) is posting a decrease compared to 2023 levels (fewer flights on domestic flows in Norway, Sweden as well as reduction on Germany ↔ Italy flows).

Top 25 global aircraft operators

(average daily departure flights)

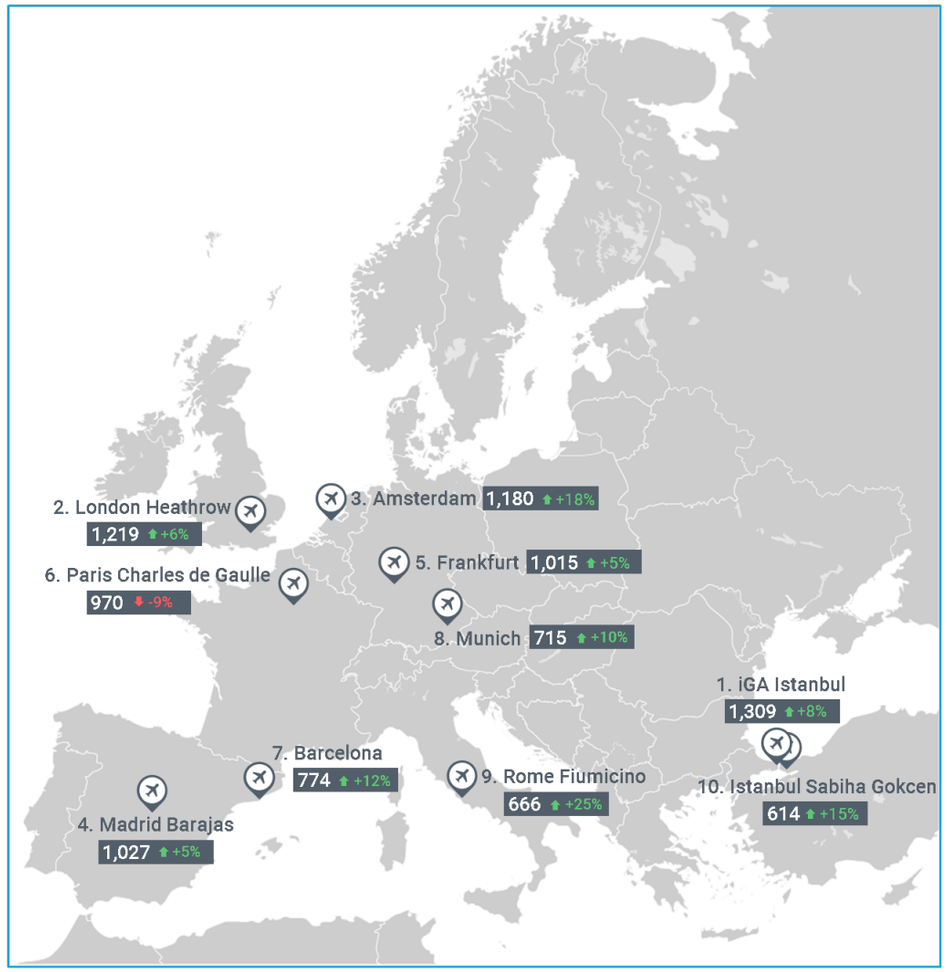


Source: Flightradar24 Historical Global Utilisation data

Over the last week:

- Eight European airlines are ranked in the top 25 global aircraft operators (same airlines in 2023).
- The first European aircraft operator is Ryanair (ranked 5th) – the same rank as a year ago.
- Seven more airlines make the top 25: Turkish Airlines (11th), Lufthansa (13th), easyJet (16th), British Airways (18th), Air France (19th), KLM (21st) and Wizz Air (24th).

Top 10 airports



Airport ranking

Week 29 Jan - 04 Feb 2024

See more

No.	Airport	Avg. daily dep/arr flights	% prev week	% prev year	% 2019
1.	iGA Istanbul	1,309	+0%	+8%	n/a
2.	London Heathrow	1,219	+2%	+6%	+1%
3.	Amsterdam	1,180	+6%	+18%	-4%
4.	Madrid Barajas	1,027	+1%	+5%	-2%
5.	Frankfurt	1,015	-1%	+5%	-20%
6.	Paris Charles de Gaulle	970	+0%	-9%	-19%
7.	Barcelona	774	+4%	+12%	-0%
8.	Munich	715	+1%	+10%	-29%
9.	Rome Fiumicino	666	+3%	+25%	-9%
10.	Istanbul Sabiha Gokcen	614	+2%	+15%	+0%

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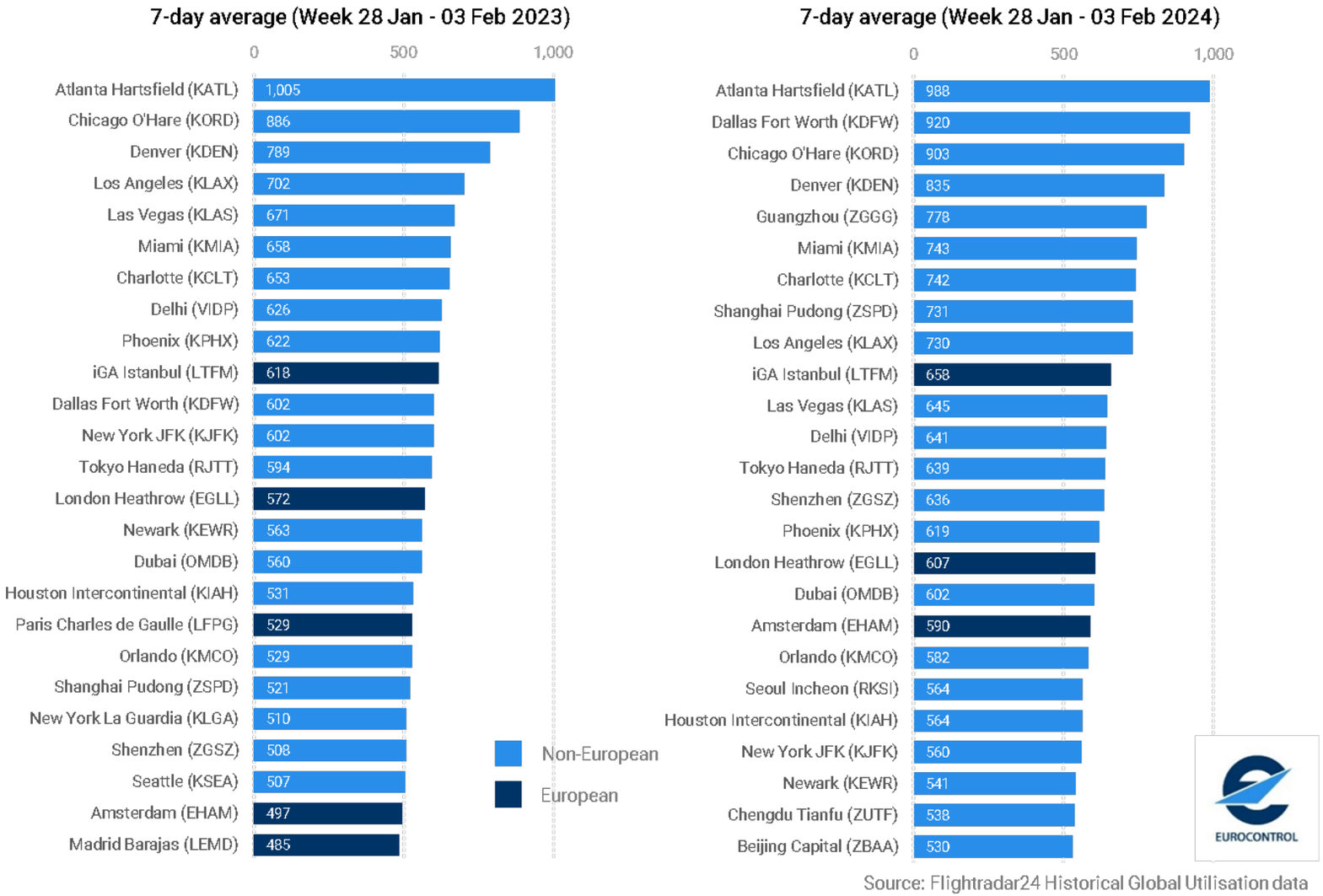
- The map on the left shows the Top10 airports in Europe.
- All but one airport recorded growth or similar number of flights vs the previous week. Frankfurt airport was affected by a security staff strike.
- All airports but one experienced growth vs 2023, ranging from +5% (Madrid, Frankfurt) to +25% (Rome Fiumicino). Paris CDG recorded fewer flights as a result of precautionary measures in the context of the trial for future system implementation (4-Flight trial).
- Only two of the top 10 airports (London Heathrow and Istanbul Sabiha Gokcen) are currently handling traffic at or above their 2019 levels.

Top 25 global airport departures

(average daily departure flights)



Source: Flightradar24 Historical Global Utilisation data

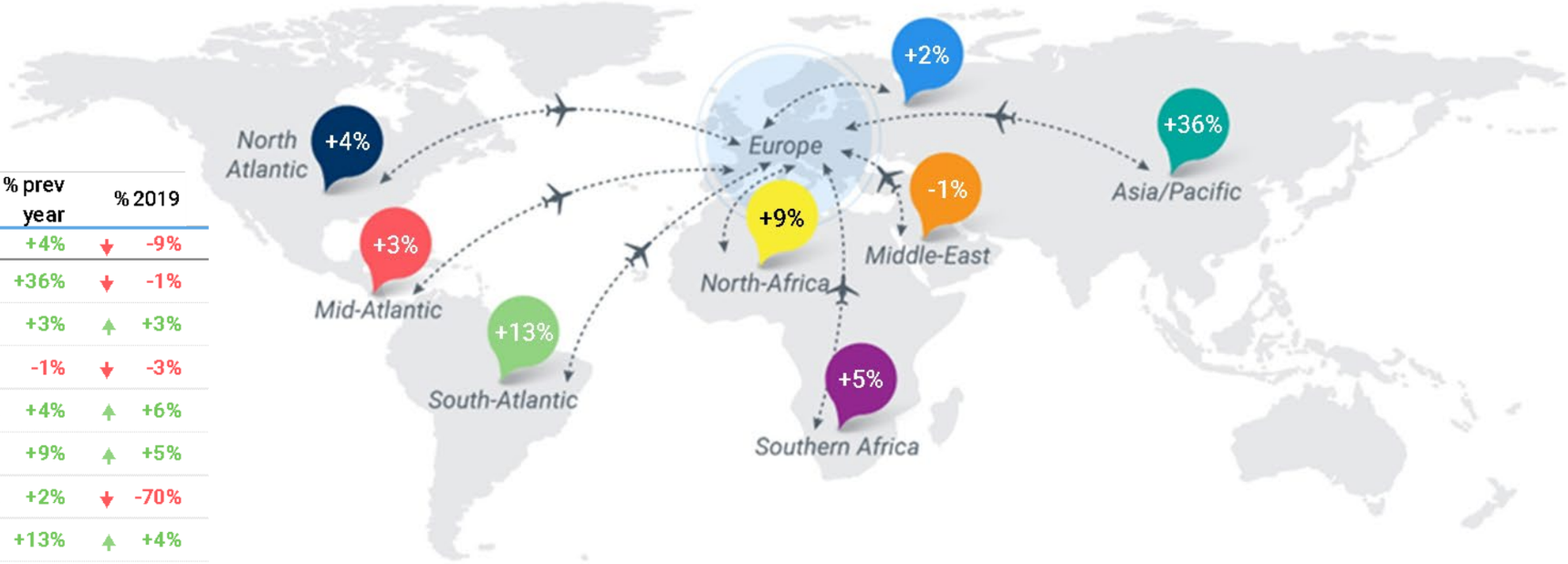
Over the last week:

- Three European airports are ranked in the top 25 of global airport departures (in the equivalent week of 2023, there were five).
- The highest ranked European airport (10th) is iGA Istanbul Airport, the same rank as in 2023.
- The other European airports in the top 25 are London Heathrow (16th), Amsterdam (18th).
- Paris CDG dropped out of the top 25 for the reason mentioned in the previous slide.

Traffic flows

(average daily departure/arrival flights for week 29 Jan - 04 Feb 2024)

Region	Average daily flights	% prev week	% prev year	% 2019
Intra-Europe	17,291	+1%	+4%	-9%
Europe ↔ Asia/Pacific	766	-0%	+36%	-1%
Europe ↔ Mid-Atlantic	200	+0%	+3%	+3%
Europe ↔ Middle-East	1,229	+4%	-1%	-3%
Europe ↔ North Atlantic	923	-1%	+4%	+6%
Europe ↔ North-Africa	906	+1%	+9%	+5%
Europe ↔ Other Europe	220	-2%	+2%	-70%
Europe ↔ South-Atlantic	184	-2%	+13%	+4%
Europe ↔ Southern Africa	315	+2%	+5%	-2%
Non Intra-Europe	4,741	+1%	+8%	-9%



- The main traffic flow was intra-European with 17,291 daily flights last week, more (+1%) compared to the previous week. Intercontinental flows resulted in 4,741 daily flights on average last week, +1% vs prev. week.
- The second-largest regional flow is between Europe and Middle-East: 1,229 average daily flights last week, 4% more than in the previous week.
- The third flow is to/from North-Atlantic, with 923 daily flights, recording slightly lower levels compared to last week (probably related to the declines recorded in Paris CDG/Frankfurt).
- The fourth flow is to/from North-Africa, with 906 flights per day, decreased (+1%) vs the previous week's value.
- Flows with Other Europe (including the Russian Federation) remain massively reduced at -70% compared to 2019.
- Flows between Europe and Asia/Pacific have now largely recovered to only -1% compared to 2019.

Top 10 long-haul country pairs

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

Week 29 Jan - 04 Feb 2024

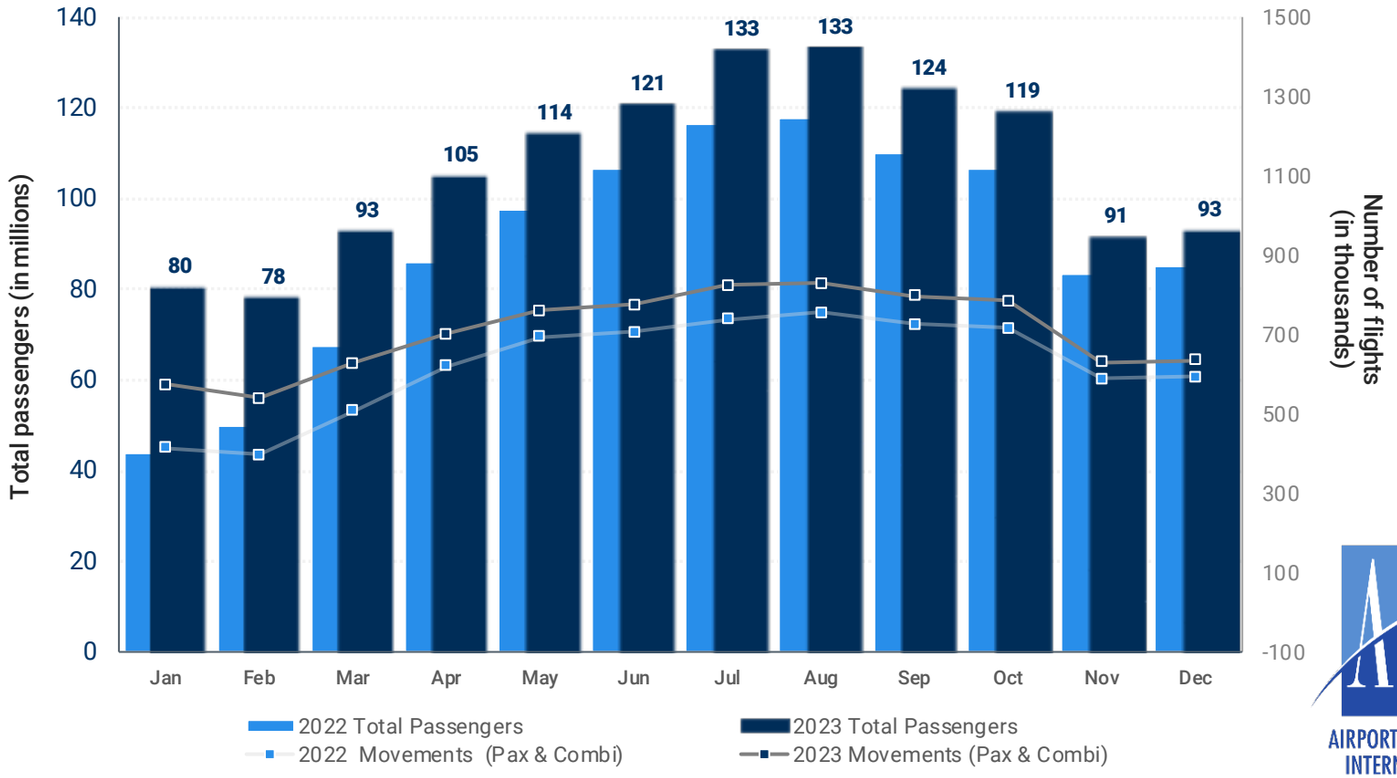
No.	Country pair	Average daily flights	% prev week	% prev year	% 2019
1.	UK ↔ US	240	+2%	+3%	-2%
2.	Germany ↔ US	125	-5%	-8%	-7%
3.	France ↔ US	79	-1%	-9%	-3%
4.	Netherlands ↔ US	67	-3%	+13%	+10%
5.	UAE ↔ UK	63	+3%	+16%	+0%
6.	India ↔ UK	44	+1%	+4%	+13%
7.	Germany ↔ UAE	42	-3%	+17%	-8%
8.	Russia ↔ UAE	41	+2%	+7%	+1500%
9.	Spain ↔ US	41	+2%	-0%	-4%
10.	Türkiye ↔ US	38	-1%	+29%	+95%

- Six of the top 10 long-haul country pairs are with the United States, the main three being between the US and the UK, Germany and France. Three flows within the top 10 are pairs between Europe and the United Arab Emirates. The last flow is connecting UK and India.
- Only five flows posted an increase vs the previous week.
- All but three flows posted an increase on the same week in 2023.
- Five flows are currently at or above 2019 levels (Netherlands ↔ US, UAE ↔ UK, India ↔ UK, Türkiye ↔ US and Russia ↔ UAE; this last flow is largely inflated by the Ukraine-Russia war, with the UAE acting as a hubbing alternative to Europe).

Top 40 European airports: passengers

2023

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(*) was **1.28 billion in** 2023, **20%** more than in **2022**, while the number of corresponding flights amounted to 8.5 million, a 14% increase on 2022. The respective **recovery** rates **on 2019** levels were **94%** in **passenger numbers** and 89% for flight movements.
- **Certain aircraft operators** are operating **above** their **2019 levels** in terms of **seats**, mainly thanks to new aircraft models (e.g. NEOs).
- During the first quarter of 2023, the number of passengers at the top 40 airports increased significantly compared to 2022 (Jan: +83%, Feb: +56%, Mar: +37% as 2022 was affected by Omicron). The monthly growth rate progressively levelled off from June to circa 14%, and remained constant during the third quarter of 2023. Monthly passenger growth was 9% in November and in December.

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

Economics

Week 29 Jan - 04 Feb 2024

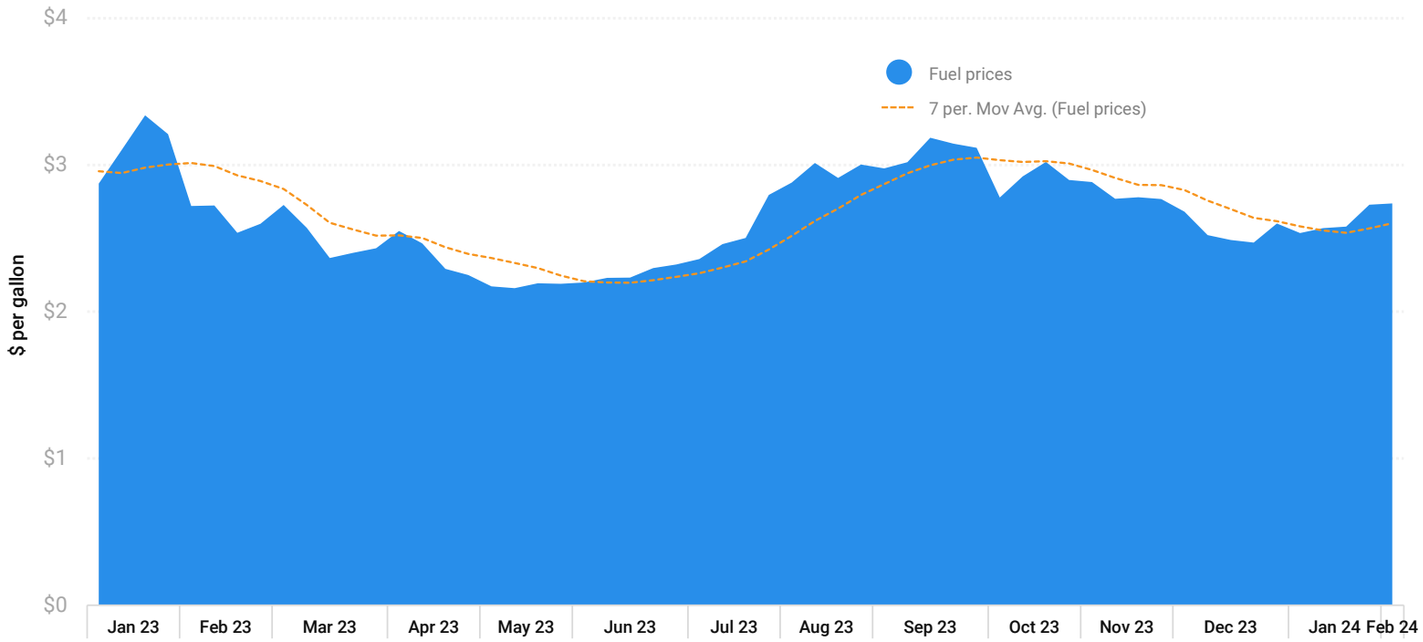
02 Feb 2024
avg fuel price:

$2.74 /gallon

7%
vs. $2.57 /gallon
on 12 Jan 2024

Source: IATA/Platts

Jet fuel price (Europe)

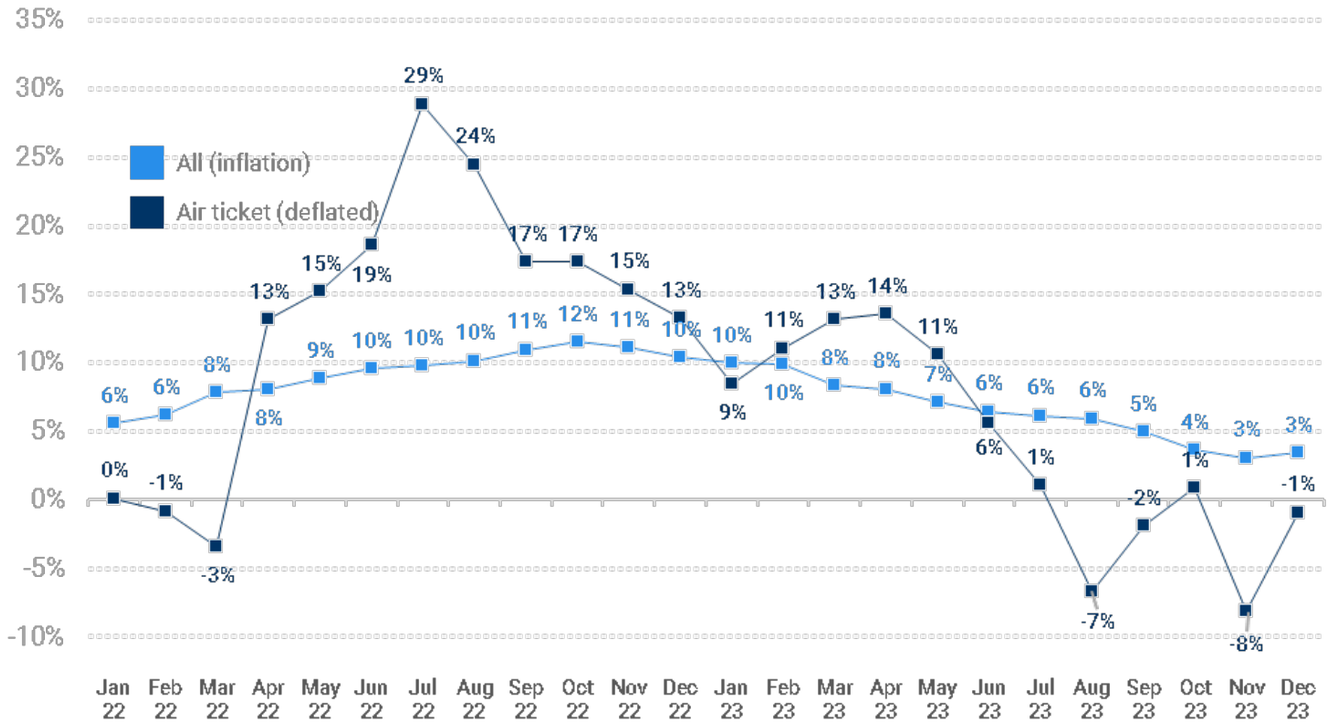


Source: IATA/Platts

- The average price of jet fuel was at 2.74 USD/gallon on 02 February 2024, higher (+6.5%) than two weeks ago.
- Based on a moving average trend, fuel prices in Europe mainly declined during the first half of 2023.
- After June 2023, jet fuel prices rose when Saudi Arabia (and the Russian Federation) started to cut oil production. However, since September there has been a slight decline.
- In December 2023 OPEC+ members (13 OPEC + 11 non-OPEC) including Saudi Arabia extended their voluntary oil output reductions until the end of Q1 2024 amid concerns over future fuel demand.

Price change per month (EU27)

Values compare to the same month of the previous year



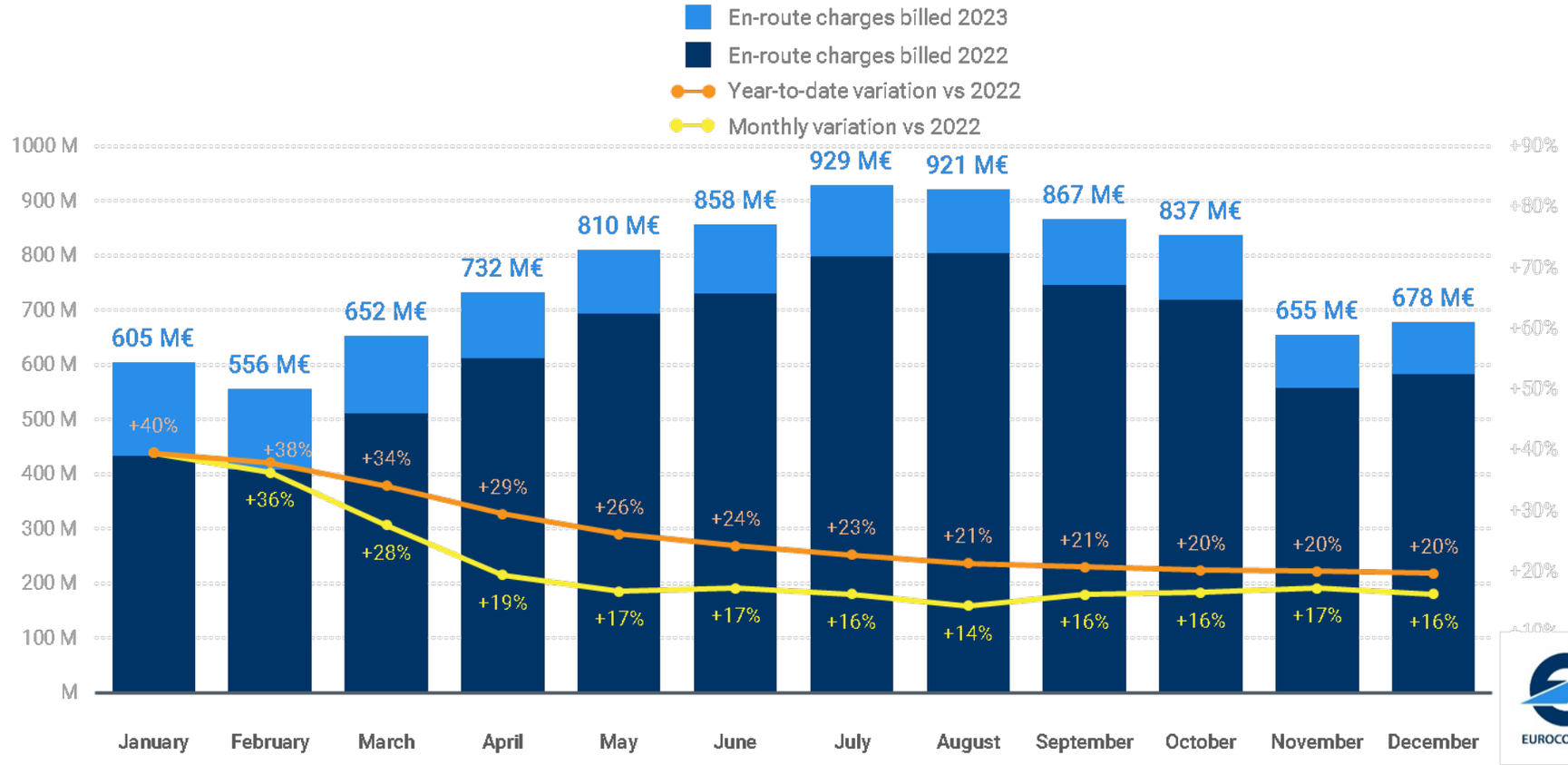
Source: EUROSTAT

The latest information from EUROSTAT shows the following:

- In 2023, all-prices inflation slowed during ; overall, prices were **6%** higher than in 2022. Air ticket prices eased as well, posting an average increase for the year of **3%** (excluding inflation) versus 2022.
- Air ticket prices showed big reductions in August and November 2023 (but the air ticket prices indices were quite high in August 2022 and November 2022).

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

Year-to-date amount billed: 9,102 M€ (+20% vs 2022)



- En-route charges billed in **2023** amounted to **9,102 M€, 20% more (1,534 M€) than in 2022.** This amount is also 15% (1,206 M€) more than in 2019.
- The variation with respect to 2022 is explained by an increase in Unit Rates (+7%) and an increase in Service Units (+14%) (Service Units take into account the distance flown and weight of the aircraft).
- The average distance per flight increased by +2% in 2023, and the average weight per flight by +3% (vs 2022).
- It should be noted that 2023 Unit Rates include the start of the recovery of the revenue losses that occurred in 2020 and 2021, covering almost all SES States.
- The variation with respect to 2019 is mostly due to an increase in Unit Rates.

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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 traffic 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. Rolling Seasonal Plan:
   www.eurocontrol.int/publication/european-network-operations-plan-2024-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