



EUROCONTROL

EUROPEAN AVIATION OVERVIEW

12-18 Feb 2024

Headlines

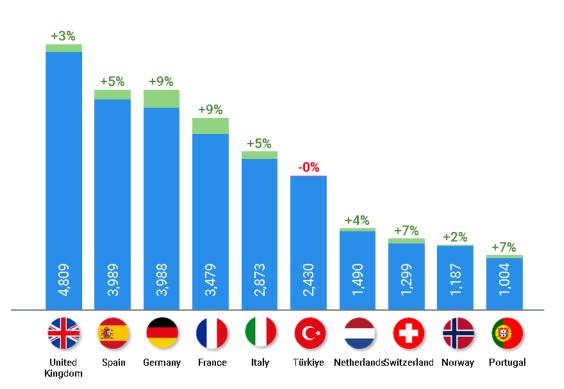
(Week 12-18 Feb 2024)

- The Network recorded 24,452 average daily flights (+5% vs 2023). The average number of flights was 4% higher than in the previous week.
- Last week, Network traffic was at 92% of 2019 levels.
- On average, the top 10 carriers increased their capacities by 6% compared to the previous week.
- En-route ATFM delays averaged 9,300 minutes per day (0.38 min/flight). Strong weekend traffic for popular ski destinations (France, Switzerland) and for Morocco and the Canary Islands resulted in some delays. Capacity issues at Karlsruhe ACC. Brief failure in Zurich ACC of the Flight Data Processing System (FDPS) which necessitated a short zero-rate for the Zurich FIR on Sunday 18 February.
- Arrival and departure punctuality, at 82.9% and 77.6% respectively, were 1.7/2.5 percentage points below the 2019 levels, but much better than the equivalent week in 2023.
- The average jet fuel price stood at 2.77 USD/gallon on 16 February 2024, a 1% increase over two weeks.
- EUROCONTROL billed 661M€ in en-route charges in January 2024, 9% above the amount billed for 2023 flights, reflecting more service units and higher unit rates. The average distance per flight keeps increasing (+2% in January 2024 vs January 2023) as well as the average weight per flight (+3%).

Top 10 busiest States

On week 12-18 Feb 2024

(all flights excl. overflights compared with previous week)

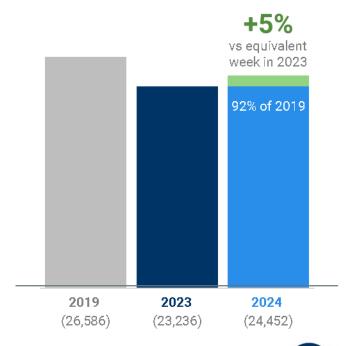




Traffic situation

Average daily flights (including overflights)

Week 12-18 Feb 2024



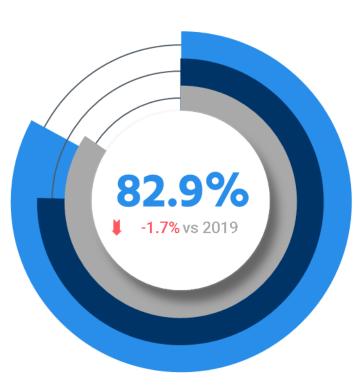


Arrival & departure punctuality

(all network scheduled flights)

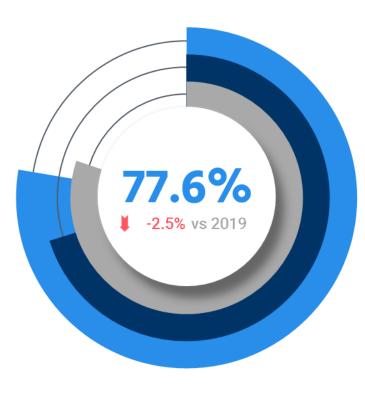
Week 12-18 Feb 2024

ARRIVAL PUNCTUALITY



84.6% ______ in 2019 75.4% _____ in 2023

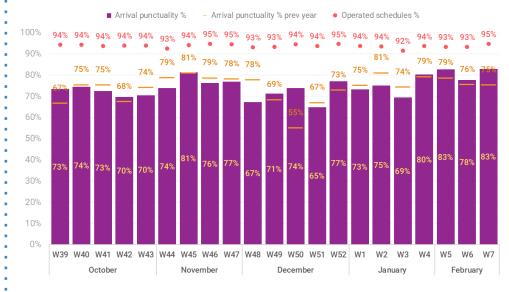
DEPARTURE PUNCTUALITY



80.2% ______ in 2019 70.2% _____ in 2023

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

- In Week 7 (12-18 February 2024), arrival punctuality at airports recorded a new high for the time series below and, at 83%, was above last year (+7.5 pp) and also improved when compared to the previous week (+5.2pp).
- For February so far, arrival punctuality is at 81%, significantly better (+4.6 pp) than in 2023.
- So far this year, overall, punctuality is at 77%, slightly above 2023 levels (+0.3pp).

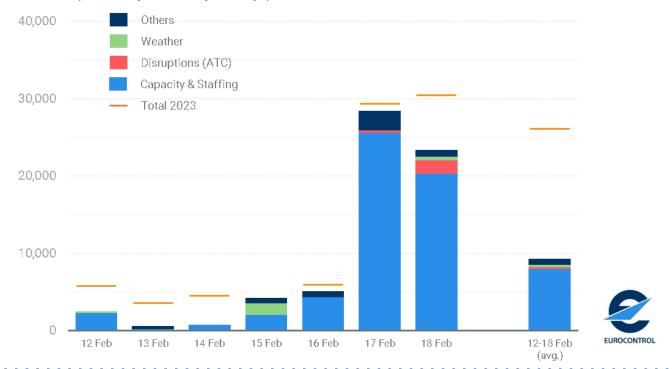




En-route ATFM delays

Delays per cause (EUROCONTROL Area)

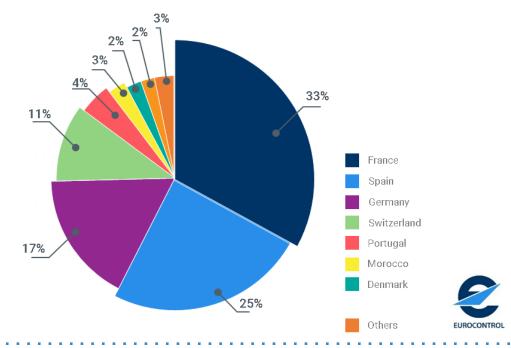
In minutes (total daily and 7-day average) in 2024



- Week 7 (12-18 February) registered higher delay (+9%) than the previous week as traffic demand increased. Delay was 64% lower than in the equivalent week of 2023. Note that the ATFM delays on Thursday 16 February 2023 (comparison day with Thursday 15 February 2024) are off the chart (103,000 minutes) due to a strike in France.
- En-route ATFM delay for February so far is -36% below 2023. So far this year, it is +1% vs 2023.
- With traffic growing this week and the 4-Flight system trials concluded, capacity/staffing delays were the main cause of delay in Week 7.

Share of en-route ATFM delays

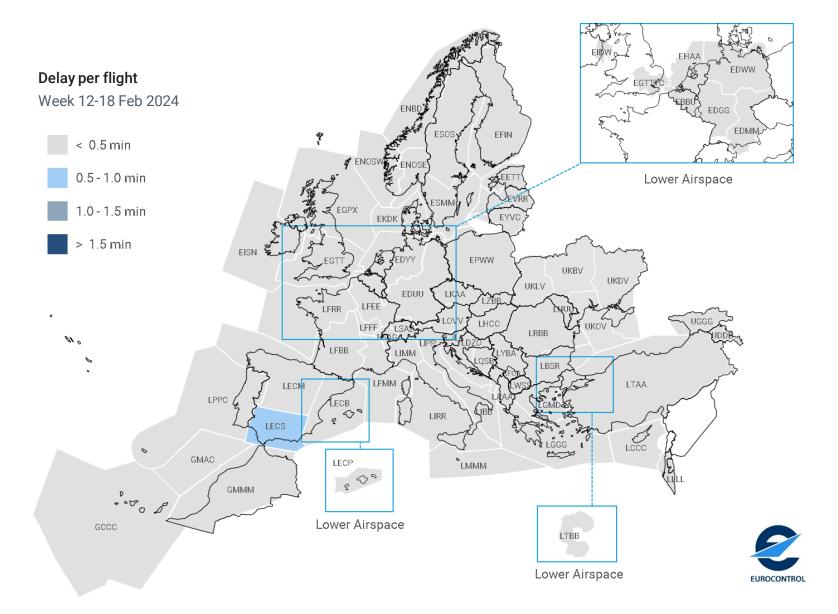
Week 12-18 Feb 2024



- France accounted for 33% of all en-route ATFM delay. The second of three busy holiday weekends for SKI destinations put pressure on both Reims and Paris ACCs.
- Spain: 25%, Seville ACC was heavily loaded at the weekend with holiday traffic, while Madrid ACC was disturbed Tuesday by a French mil ex. in the Bay of Biscay.
- Germany: 17%, mostly weekend Karlsruhe UAC capacity and Munich i-CAS2 delays.
- Switzerland: 11%, strong weekend traffic demand to ski destinations, aggravated on Sunday evening by a brief failure in Zurich ACC of their Flight Data Processing System (FDPS) which necessitated a short zero-rate for the Zurich FIR.

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En-route ATFM delayed flights per Area Control Centre



- Over the last week (Week 7), there was no ACC with delay higher than 1.0 min/flight.
- Seville ACC recorded 0.95 min/flight, with traffic to/from Morocco and the Canary Islands at unprecedented levels for the February holiday period.
- Reims ACC: strong weekend traffic demand for the popular ski destinations triggering en-route capacity regulations.
- Paris ACC: Airlines restoring schedules previously suspended for the 4-flight trial combined with strong weekend traffic demand for the popular ski destinations triggering enroute capacity regulations.
- Geneva ACC: strong weekend traffic demand for the popular ski destinations triggering enroute capacity regulations.
- Canarias ACC: strong weekend holiday traffic demand for Canarias destinations triggering en-route capacity regulations.

Top 10 States

Departures and arrivals

Week 12-18 Feb 2024

No.	Country	Average daily flights	% prev week	% prev year	% 2019	See more
1.	United Kingdom	4,809	+3%	+ +6%	▼ -10%	_
2.	Spain	3,989	+5%	+8 %	+ +8%	
3.	Germany	3,988	+9%	↑ +14%	▼ -24%	
4.	France	3,479	+9%	+ +0%	♦ -9%	
5.	1 Italy	2,873	+5%	+ +7%	▼ -2%	
6.	• Türkiye	2,430	-0%	♦ -0%	↑ +11%	
7.	Netherlands	1,490	+4%	↑ +15%	♦ -4%	
8.	Switzerland	1,299	+7%	+ +5%	♦ -4%	
9.	Norway	1,187	+2%	♦ -1%	▼ -13%	
10.	Portugal	1,004	+7%	+ +0%	+ +13%	EUROCONTROL -

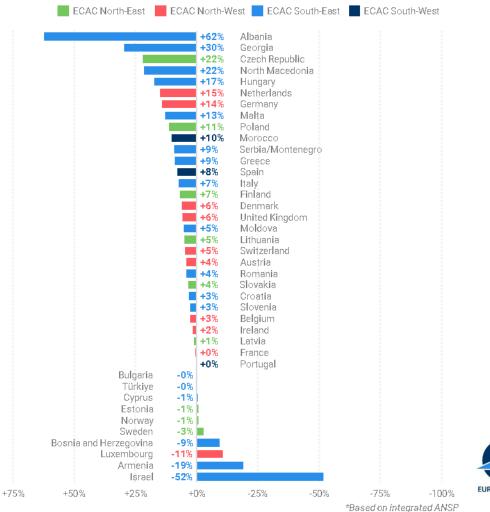


- The top 10 States, in aggregate, recorded more flights compared to the previous week (+5.1%).
- Compared to the previous week, the ranking remained stable except Portugal which entered in 10th position.
- All States recorded more flights compared to the previous week, except Türkiye which was stable and slightly lower.
- Three States within the top 10 are recording traffic above 2019 (Spain, Türkiye and Portugal). The seven remaining States are still between 24% and 2% below pre-COVID levels.
- The number of flights to/from Albania is recording record growth rates (+62%) compared to last year thanks to the expansion of Wizz Air flows out of/into Tirana.
- Israel recorded 52% fewer flights compared to the same week in 2019.

States in the EUROCONTROL Network

Compared to the equivalent week in 2019

Dep/Arr flights for week 12-18 Feb 2024





Top 10 aircraft operators

Week 12-18 Feb 2024 (avg daily flights)

See more

No.	Aircraft operator	Average daily flights	% prev week	% prev year	% 2019	
1.	Ryanair Group	2,223	+0%	+2 %	↑ +17%	
2.	easyJet Group	1,387	+16%	+8 %	→ -8%	
3.	Urkish Airlines	1,333	-1%	↑ +1%	+ +6%	
4.	Lufthansa Airlines	1,110	+22%	↑ +34%	♦ -25%	
5.	Air France Group	862	+12%	→ -7%	▼ -24%	
6.	British Airways Group	817	+3%	+10 %	▼ -7%	
7.	KLM Group	806	+5%	+25 %	↑ +7%	
8.	Wizz Air Group	734	-1%	↑ +12%	↑ +58%	
9.	SAS Group	580	+6%	+ +4%	▼ -28%	
10.	velog Vueling	504	+4%	→ -1%	+8 %	EUR

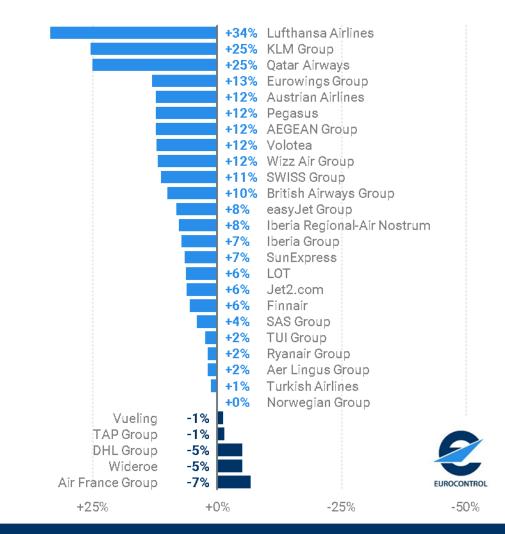


+50%

- The top 10 aircraft operators posted an increase in the number of flights (6.0% on average) compared to the previous week, mainly owing to easyJet, Lufthansa and Air France expanding their operations.
- easyJet moved to 2nd position, displacing Turkish Airlines while Air France moved to 5th position, displacing British Airways.
- Biggest increases were on flows Germany ↔ Germany, Germany ↔ UK and Germany ↔ Italy for Lufthansa, on flows UK ↔ UK, France ↔ UK and Spain ↔ UK for easyJet and on flows France ↔ France for Air France.
- Last week, five airlines within the top 10 had flight numbers above 2019 levels: +58% (Wizz Air Group), +17% (Ryanair Group), +8% (Vueling), +7% (KLM Group) and +6% (Turkish Airlines).

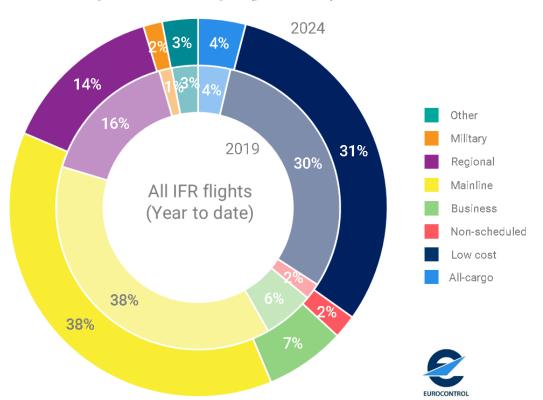
Aircraft operators in the **EUROCONTROL** Network

Compared to the equivalent week in 2019 Dep/Arr flights for week 12-18 Feb 2024



Market segments in the EUROCONTROL Network

Average share of total flights (year to date)

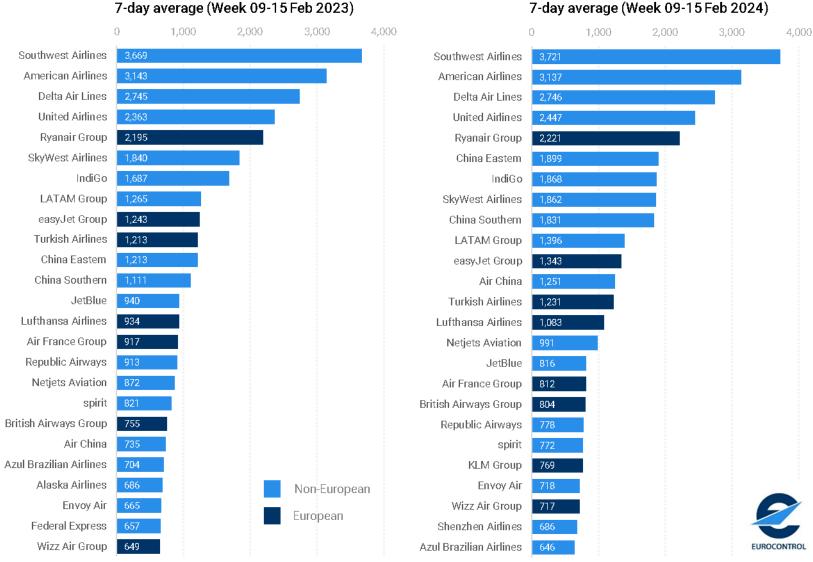


No.	Mar	ket segment	Avg. flights	% prev week	% prev year	% 2019
1.	^	Mainline	9,110	+5%	↑ +13%	◆ -7%
2.	†	Low Cost	7,499	+5%	↑ +7%	↑ +0%
3.	† 0	Regional	3,400	+2%	↑ +5%	◆ -15%
4.	Ň	Business	1,754	+2%	→ -6%	↑ +41%
5.		All-cargo	937	-4%	▼ -16%	↑ +10%
6.	£	Other	843	+13%	→ -8%	▼ -19%
7.	†	Non-Scheduled	492	+1%	→ -8%	↑ +9%
8.	^ :	Military	420	+3%	▼ -16%	◆ -10%

- Most of the market segments (Mainline, 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 (-2pp) while the Low cost and the business market shares increased by 1pp.
- Compared to 2023, passenger markets recorded growth in the number of flights operated: Mainline (+13%), Low cost (+7%) as well as Regional (+5%).
- On the other hand, All-Cargo (-16%) is posting a decrease compared to 2023 levels (fewer flights on domestic flows in Türkiye), Non-Scheduled (-8% due to reduction in domestic flights in Türkiye despite increase in domestic flights in Spain) and Business (-6% due to reduction in domestic flights in Germany and Türkiye despite increase in domestic flights in France).
- Three market segments are above 2019 levels: Business (+41%), All-Cargo (+10%), Non-Scheduled (+9%). Low Cost are at the level of 2019 while two are below: Regional (-15%) and Mainline (-7%).

Top 25 global aircraft operators

(average daily departure flights)



Over the last week:

- Eight European airlines are ranked in the top 25 global aircraft operators (7 airlines in 2023 as KLM was 26th).
- The first European aircraft operator is Ryanair (ranked 5th) the same rank as a year ago.
- Seven more airlines make the top 25: easyJet (11th), Turkish Airlines (13th), Lufthansa (14th), Air France (17th), British Airways (18th), KLM (21st) and Wizz Air (23rd).

Source: Flightradar24 Historical Global Utilisation data

Top 10 airports



Airport ranking

Week 12-18 Feb 2024

See more

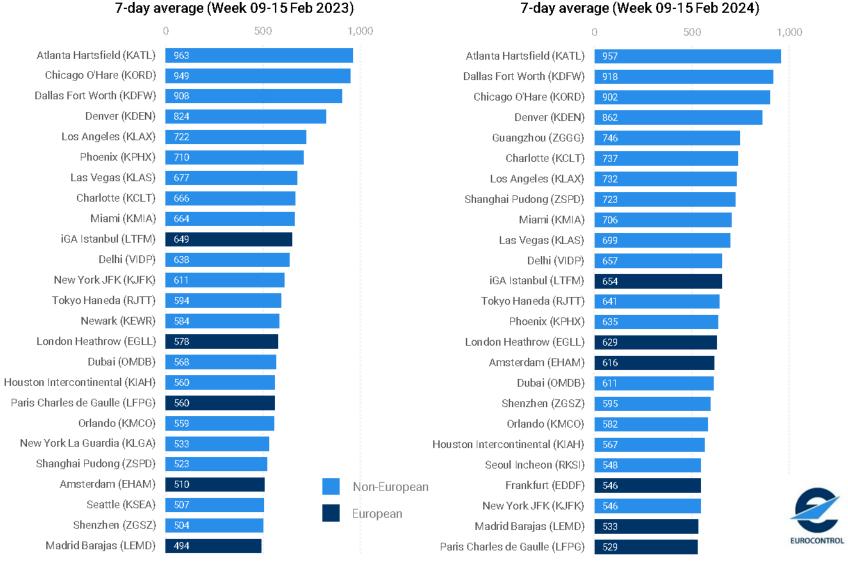
No.	Airport	Avg. daily dep/arr flights	% prev week	% prev year	% 2019
1.	iGA Istanbul	1,302	-1%	↑ +2%	· n/a
2.	London Heathrow	1,271	+3%	↑ +10%	+ +0%
3.	Amsterdam	1,265	+4%	↑ +20%	→ -2%
4.	Paris Charles de Gaulle	e 1,124	+11%	↑ +0%	♦ -11 %
5.	Frankfurt	1,109	+13%	↑ +31%	▼ -17%
6.	Madrid Barajas	1,072	+2%	+ +8 %	→ -1%
7.	Munich	836	+22%	↑ +27 %	▼ -25%
8.	Barcelona	806	+4%	↑ +6%	↑ +1%
9.	Rome Fiumicino	694	+3%	↑ +23 %	♦ -9%
10.	London Gatwick	655	+11%	↑ +5%	♦ -9%

- The map on the left shows the Top10 airports in Europe.
- All but one airports recorded growth vs the previous week as we are entering into the school holiday week-ends. The high increases at Frankfurt and Munich airports are driven by Lufthansa's strike the week before, which lowered the traffic.
- All airports experienced growth vs 2023, ranging from +0% (Paris CDG) to +31% (Frankfurt).
- Only two of the top 10 airports (London Heathrow and Barcelona) are currently handling traffic at or above their 2019 levels.



Top 25 global airport departures

(average daily departure flights)



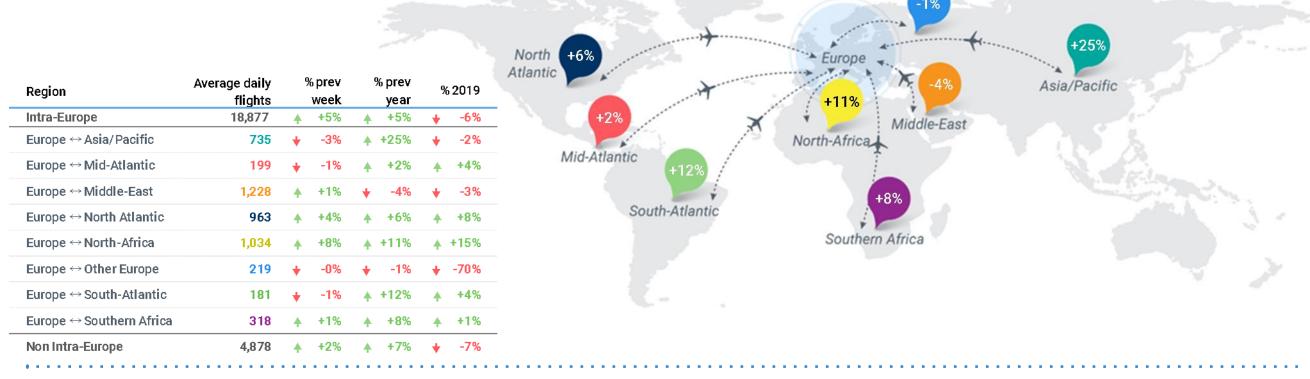
Over the last week

- Six 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 (12th) is iGA Istanbul Airport, slightly less as in 2023 (10th).
- The other European airports in the top 25 are London Heathrow (15th), Amsterdam (16th), Frankfurt (22nd), Madrid (24th) and Paris CDG (25th).

Source: Flightradar24 Historical Global Utilisation data

Traffic flows

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



- The main traffic flow was intra-European with 18,877 daily flights last week, more (+5%) compared to the previous week. Intercontinental flows resulted in 4,878 daily flights on average last week, +2% vs prev. week.
- The second-largest regional flow is between Europe and Middle-East: 1,228 average daily flights last week, 1% more than in the previous week.
- The third flow is to/from North-Africa, with 1,034 flights per day, 8% more than in the previous week.
- The fourth flow is to/from North-Atlantic, with 963 daily flights, 4% more than in the previous week.
- 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 -2% compared to 2019.

Top 10 long-haul country pairs

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

Week 12-18 Feb 2024

No.	Country pair	Average daily flights	% prev week	% prev year	% 2019
1.	UK ↔ US	242	+2%	♦ -4%	♦ -6%
2.	Germany ↔ US	131	+6%	↑ +1%	→ -6%
3.	France ↔ US	88	+14%	→ -4%	+3 %
4.	Netherlands \leftrightarrow US	67	-4%	↑ +9%	↑ +14%
5.	$UAE \leftrightarrow UK$	60	-2%	+8 %	→ -5%
6.	Spain ↔ US	48	+9%	♦ +13%	↑ +21%
7.	India ↔ UK	43	-1%	↑ +2%	♦ +10%
8.	Germany ↔ UAE	43	+1%	♦ +21%	▼ -7%
9.	Russia ↔ UAE	41	-5%	♦ +0%	↑ +1335%
10.	Italy ↔ US	35	+14%	↑ +27%	↑ +27%



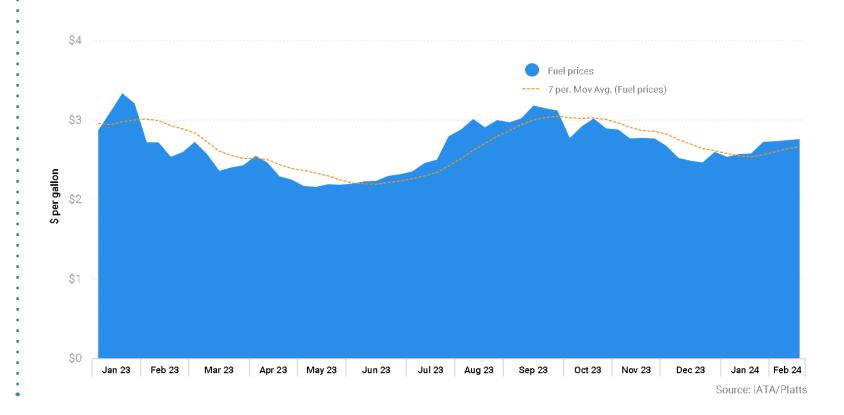
- Six of the top 10 long-haul country pairs are with the United States, the main four being between the US and the UK, Germany, France and the Netherlands.
- Three flows within the top 10 are pairs between the United Arab Emirates and Europe (UK, Germany and Russia).
- Six flows posted an increase vs the previous week.
- All but two flows posted an increase on the same week in 2023.
- Six flows are currently above 2019 levels (Italy ↔ US, Spain ↔ US, Netherlands ↔ US, India ↔ UK and France ↔ US. The flow Russia ↔ UAE (+1335%) is largely inflated by the Ukraine-Russia war, with the UAE acting as a hubbing alternative to Europe).

Economics

Week 12-18 Feb 2024



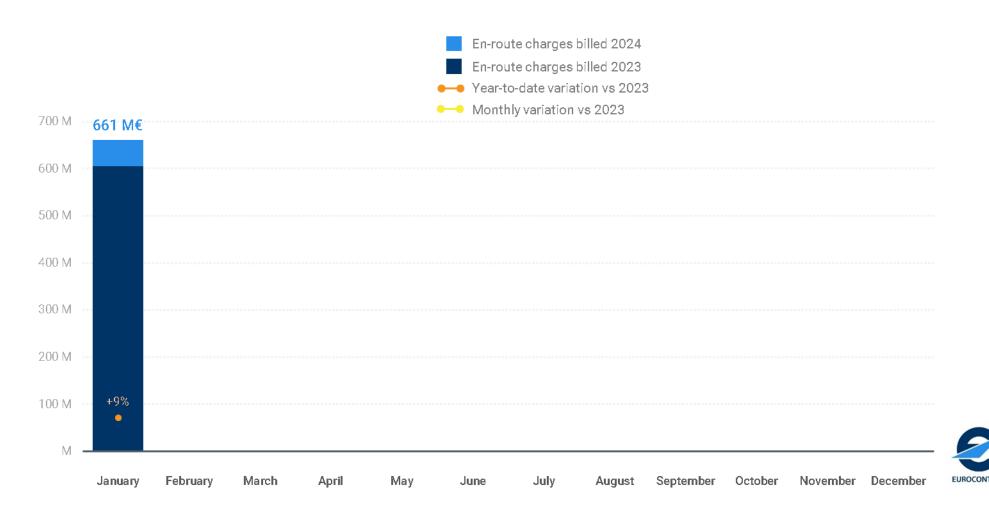
Jet fuel price (Europe)



- The average price of jet fuel was at 2.77 USD/gallon on 16 February 2024, higher (+1%) than two weeks ago.
- Based on a moving average trend, fuel prices in Europe are starting to rise again since the beginning of 2024, following a decline in Q4 2023.
- 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.

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

Year-to-date amount billed: 661 M€ (+9% vs 2023)



- En-route charges billed in January 2024 amounted to 661 M€, 9% more (1,534 M€) than in 2023. This amount is also 20% than in 2019.
- The variation with respect to 2023 is explained by an increase in Unit Rates (+3%) and an increase in Service Units (+9%) (Service Units take into account the distance flown and weight of the aircraft).
- The average distance per flight increased by +2% in January 2024 vs January 2023, and the average weight per flight by +3%.
- It should be noted that 2024 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.

Supporting European Aviation



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:

- 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.
- EUROCONTROL "Our Data" Portal: www.eurocontrol.int/our-data/ This webpage provides an overview of key charts and publications related to European aviation performance.
- 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.
- 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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