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EUROPEAN AVIATION OVERVIEW

2024

23 January 2025

2024 at a glance

10.7 million flights in NM Area, +5% vs 2023, 96% of 2019.

35,710 peak daily flights on 14 June 2024.

- Intra-European traffic **4%** up on 2023,
- Europe-Rest of the world **8%** up,
- Low-cost carrier flights **8%** up,
- Mainline carrier flights **7%** up.

5.7 million tonnes more CO_2 emissions (+7%) than in 2023 for intra-NM Area flights.

Just below €10 billion en-route charges billed:
€0.8 billion more than in 2023,
€2.1 billion more than in 2019.

17.5 min/flight of departure all-causes delay, +0.6% vs 2023 and +35% vs 2019 (+4.5 min/flight).

2.8 min/flight of ATFM delays (+13% on 2023) split between 2.1 min/flight for en-route and 0.7 min/flight at airports.

72.5% arrival punctuality for network **scheduled flights**: 1.5pp higher than in 2023, 5.6pp lower than in 2019.

Fuel prices

The jet fuel price averaged $2.39/gallon, -10% vs 2023.

Almost all States were up compared to 2023. However, there was a very wide variation between States, with South-Eastern Europe growing the fastest.

- **5,488** daily flights in the UK (+4% vs 2023)
- **4,984** daily flights in Spain (+8%)
- **4,711** daily flights in Germany (+4%)
- **4,086** daily flights in France (+2%)
- **3,789** daily flights in Italy (+8%).

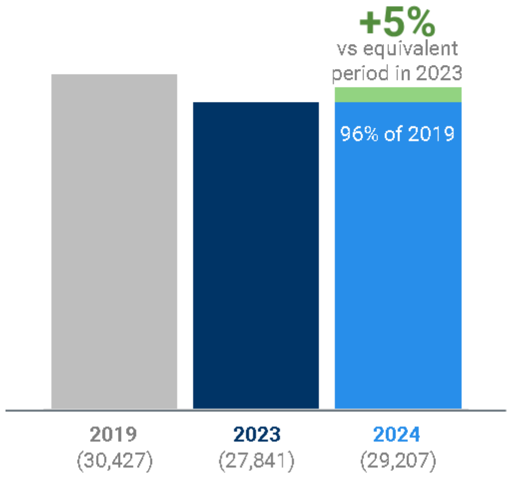
Leading aviation groups:

- Ryanair Group **3,044** daily flights (+8% vs 2023)
- Lufthansa Group **2,712** daily flights (+5%)
- IAG **2,256** daily flights (+4%)
- Air France-KLM Group **1,858** daily flights (+4%)
- easyJet Group **1,553** daily flights (+5%).

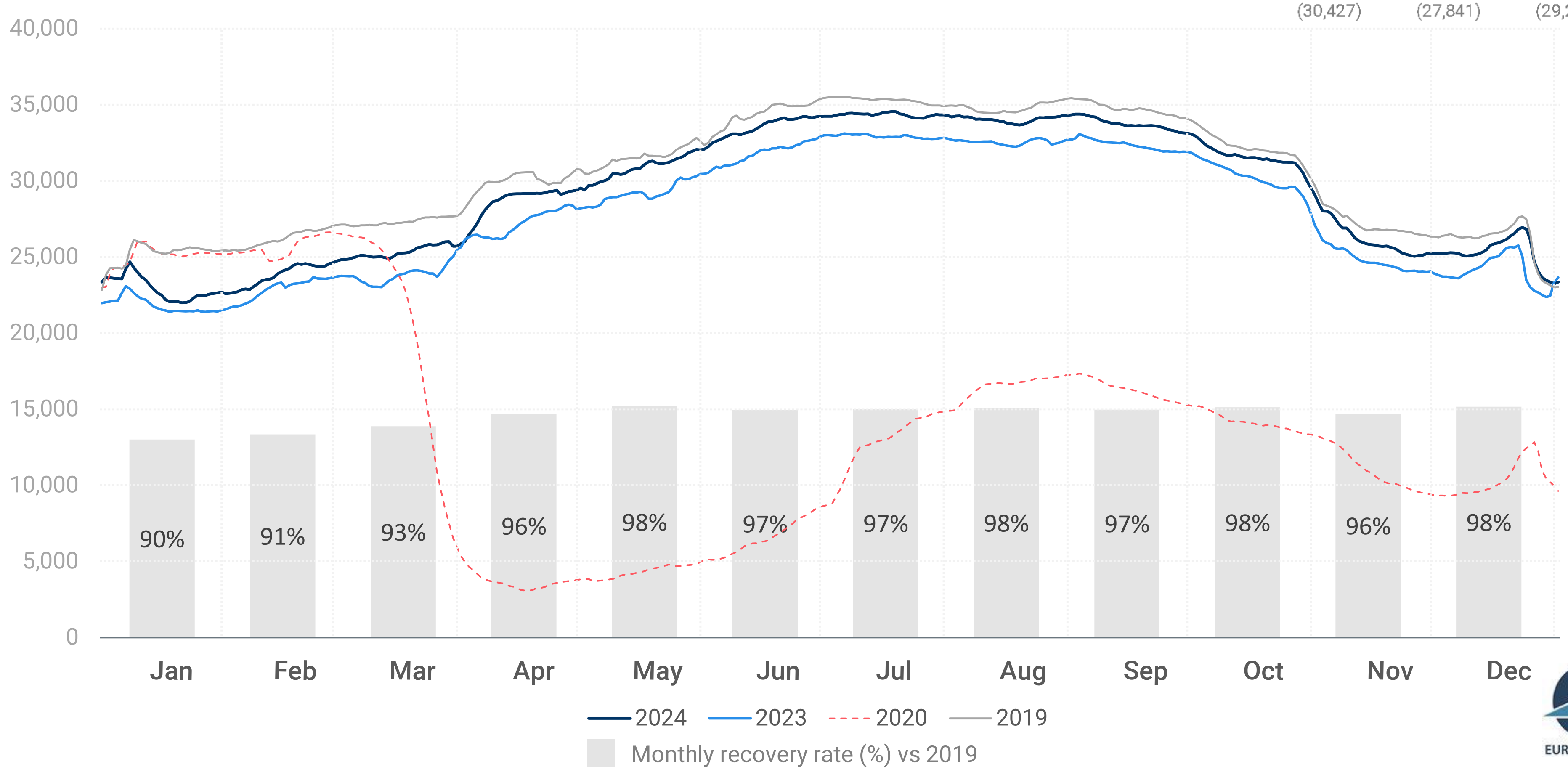
Executive Summary

- 2024 recorded **10.7 million flights** in the NM Area, **+5%** compared to 2023. The number of European flights has shown a **continued recovery,** since the end of the COVID-19 outbreak, with year-on-year growth rates progressively settling down. Traffic **volumes** were **particularly strong** during the **summer**.
- When compared to pre-COVID levels, **European flights** in 2024 closed at **96%** of **2019** levels. The recovery rate for 2024 was in line with EUROCONTROL's latest 7-year traffic forecast. While European flights as a whole have not yet recovered to pre-pandemic levels, the situation is more mixed locally.
- The vast majority of States located in **Southern Europe** have already largely **surpassed** their **2019 levels** (double digit rates) owing to the strong demand on **touristic flows**. Moreover, the **South-East European** axis was particularly busy as airline **route choices** were influenced by constrained airspaces (conflicts) in Central Europe during the Summer and progressive recovery of the **Asian flows** (China). States located in **North-East** of **Europe** are still **well below** their 2019 levels, affected by airspace closures and flight bans. Lastly, big States in the **North-West** of **Europe are struggling to recover** owing to weak arrival/departure flows between them, the exception being France and Ireland, which have recovered.
- **Ukraine's airspace** has remained **closed** since February 2022, with neighbouring airspace absorbing more traffic. The continuation of the **conflict** in Israel (since October 2023) has affected various flows that were unable to overfly the zone. **Geopolitical crises** have also had an impact on flows in Armenia, especially **overflights**.
- The largest **market segment in Europe** remained "**Mainline**" (36%), closely followed by "**Low-cost**" (34%), both **expanding** their share by 1 percentage point in 2024 (vs 2023) The latter remained the more dynamic of the two (8% growth for low-cost and 7% for Mainline). **Regional**, **Business Aviation** and **Charter** market shares remained unchanged. **All-Cargo** and **Military** contracted by 1 percentage point each (vs 2023).
- **Arrival punctuality** for the network in 2024 was **72.5%**, slightly higher (+1.5 percentage points) than 2023 levels, and well below 2019 (-5.6 percentage points).
- **En-route ATFM delays** recorded **2.1 minutes per flight** for 2024 as a whole, which is **higher than in 2023** owing to increased traffic and complexity due to **airspace unavailability**, increase in **extreme weather** events during the summer months, and **capacity** & **staffing issues** (e.g. **lack of available ATCOs**). Despite the efforts to mitigate disruptions, there was a record-breaking delay comparable to the levels of 2001.
- The **jet fuel price** in 2024 averaged $2.39/gallon, **easing** on **2023 prices** (10% lower).
- **Air ticket prices**—excluding inflation--were **slightly lower (-1%)** for Jan-Nov 2024 compared to the same period in 2023.
- For **2025**, the number of flights is **expected** to reach **100% of 2019** levels in our **base** scenario, with some months potentially recording the same or higher numbers of flights compared to 2019.
- 2025 marks the beginning of the **fourth reporting period** of the **Performance Scheme** (2025-2029).
- **Iceland** has become the **42nd member of EUROCONTROL** on 1 January 2025.

Overall traffic evolution



Evolution of traffic in the EUROCONTROL Network (all flights including overflights)



- 2024 recorded a slow start in terms of the number of flights (90-93% of 2019 levels).
- The number of flights reached 98% of 2019 levels in four months of the year, the highest recovery rate so far.
- During the first quarter of 2024, the recovery levels averaged 92%: since the start of Winter 23/24 season, some aircraft operators cut capacity owing to lower-than-expected demand, some weather issues and the impact of the conflict in Israel.
- From April onwards, the volume of flights started to pick up (96% of 2019 levels) with the start of the Summer period. The peak day for the year was recorded on Friday 14 June (37,510 flights controlled).
- The recovery levels averaged at 97% of the 2019 levels over the three remaining quarters.
- The blip in December relates to the normal calendar effect of the Christmas period.

State traffic

Departures and Arrivals

No.	Country	Average daily flights	% prev year	% 2019
1.	United Kingdom	5,488	+4%	-6%
2.	Spain	4,984	+8%	+8%
3.	Germany	4,711	+4%	-16%
4.	France	4,086	+2%	-5%
5.	Italy	3,789	+9%	+6%
6.	Türkiye	3,140	+4%	+12%
7.	Netherlands	1,596	+5%	-5%
8.	Greece	1,483	+8%	+18%
9.	Switzerland	1,287	+5%	-2%
10.	Norway	1,283	-1%	-9%

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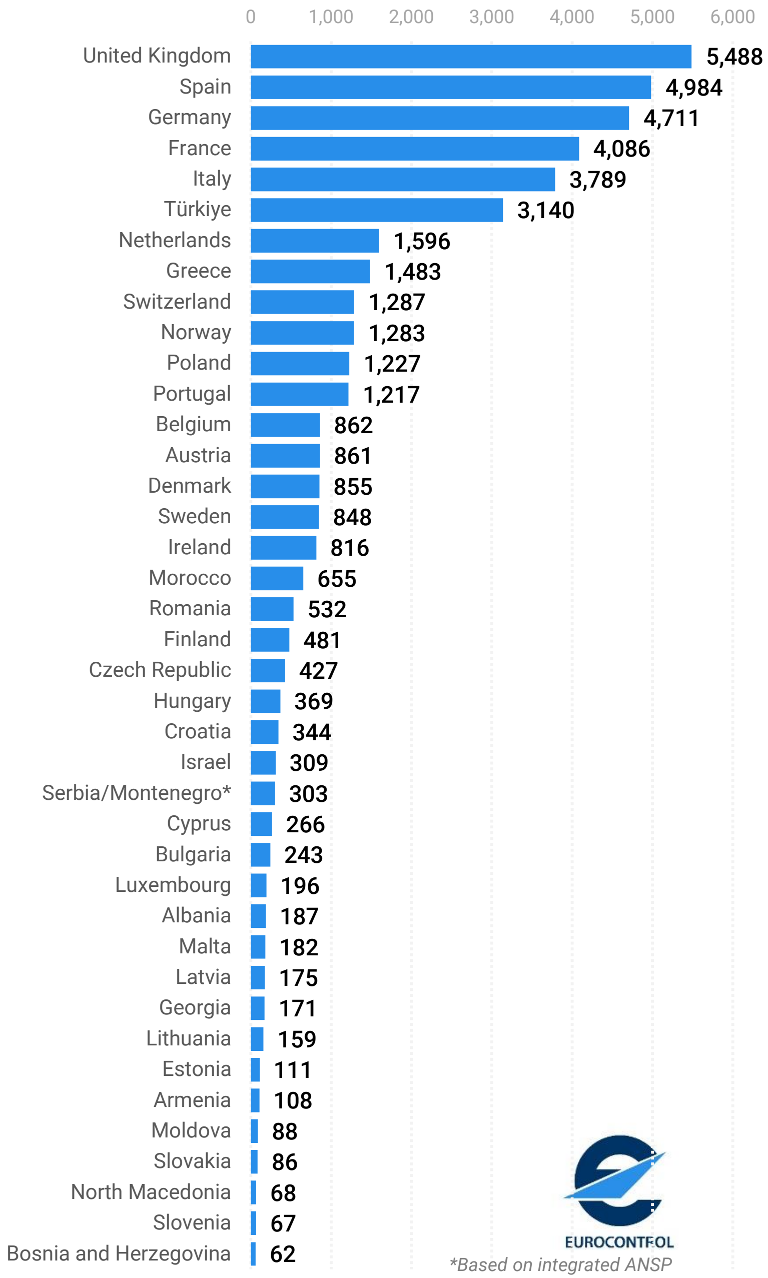
- The top 10 States in aggregate, considering arrivals and departures only, recorded 4.8% more flights compared to the previous year.
- The **United Kingdom** was the State recording the highest average number of daily flights in 2024 (5,488/day), a 4% increase on 2023. The second busiest State in 2024 was **Spain** (4,984 flights/day, +8%), followed by **Germany** (4,711flights/day, +4%).
- Compared to 2023: the ranking remained unchanged except for Switzerland and Norway which have swapped places.
- **Italy** posted the highest increase (+9%) in this top 10, as part of the dynamism of its flows with Spain (+13%), Germany (+7%) and Poland (+25%). The domestic flow in Italy has been growing too (+3%). France posted the weakest increase in this top 10 (+2%) as its domestic flow (-3%) continues to lose pace and the conflict in Near East had an impact on some flows (-33% on flows with Israel).
- Four States within the top 10 are recording traffic above 2019: **Greece** (+18%) and **Türkiye** (+12%) had already surpassed their pre-COVID levels last year. **Spain** (+8%) and **Italy** (+6%) managed to fully recover in 2024. Overall, the South Mediterranean destinations were very popular for tourism, not only for North-European visitors but also within the region itself. The six remaining States are still between -16% (**Germany**, owing to a drop in internal demand with a shift to rail or reduced business travel by air) and -2% (**Switzerland**) below pre-COVID levels.

Average daily dep/arr per State - 2024



*Based on integrated ANSP

State traffic

Departures, Arrivals and Overflights

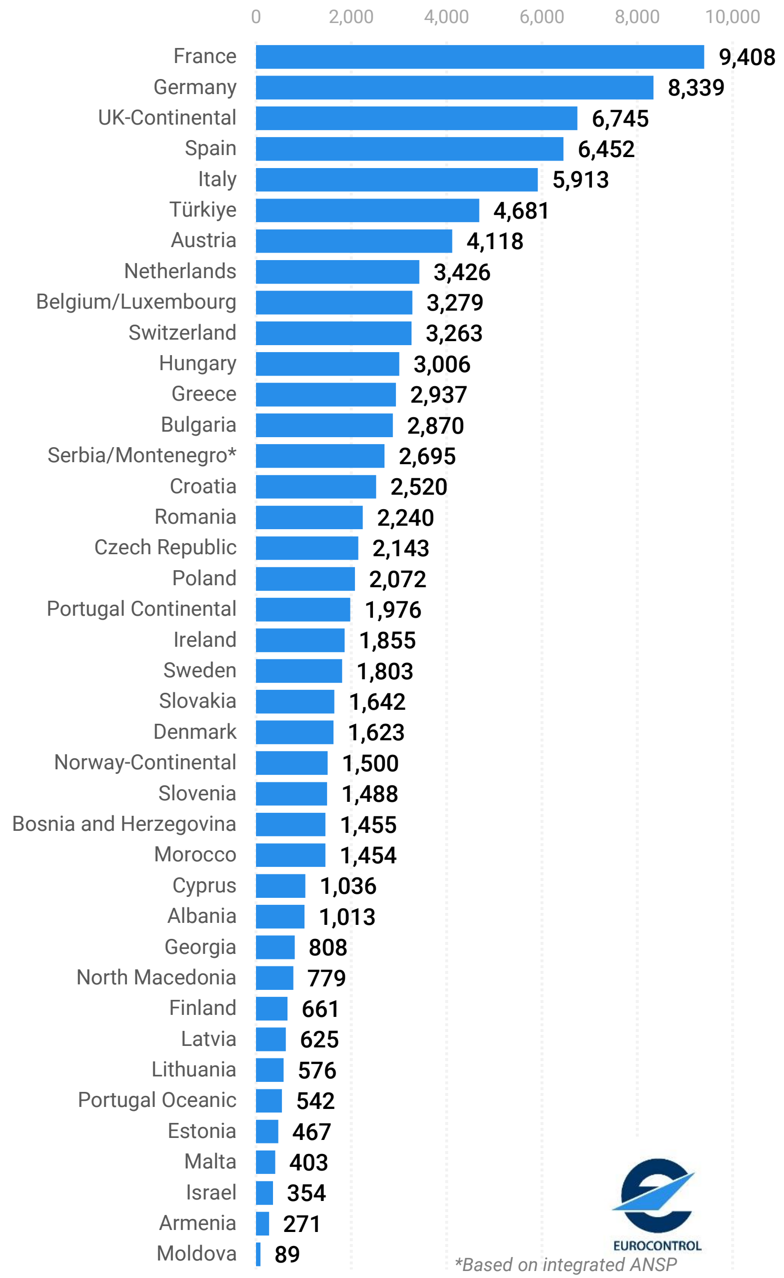
No.	Country	Average daily flights (including overflights)	% prev year	% 2019
1.	France	9,408	+6%	+2%
2.	Germany	8,339	+4%	-10%
3.	UK-Continental	6,745	+3%	-5%
4.	Spain	6,452	+7%	+9%
5.	Italy	5,913	+9%	+10%
6.	Türkiye	4,681	+4%	+10%
7.	Austria	4,118	+4%	+10%
8.	Netherlands	3,426	+5%	-6%
9.	Belgium/Luxembourg	3,279	+3%	-4%
10.	Switzerland	3,263	+9%	+1%

See more

includes Departures, Arrivals and Overflights.

- The top 10 States in aggregate, considering all flights including overflights, recorded 5.5% more flights compared to the previous year.
- France was the State recording the highest average number of daily flights in 2024 (9,408/day), a 6% increase on 2023. The second busiest State in 2024 was Germany (8,339 flights/day, +4%), followed by UK (6,745 flights/day, +3%).
- Italy and Switzerland posted the highest increase (+9% each). On top of the dynamic arrival/departure flows previously described, Italy recorded some growth owing to some flows re-routed via its airspace (eg UK /France<-> Middle-East, UK /France<-> Türkiye, UK <-> Greece) while Switzerland also recorded some important growth owing to changes in routings compared to 2023 (eg UK/Belgium&Luxembourg <-> Italy, Germany/Poland <-> Spain and UK /France<-> Middle-East).
- In 2024, South-Eastern States continued to be affected by airspace closures and flight bans (conflict Russia-Ukraine started in Feb. 2022). The conflicts in the Near-East also led to a volatile situation in terms of airspace and routes availability in the region since October 2023. Last but not least, overflights in the South Caucasus States have been particularly affected by both conflicts.
- Airline route choices were influenced by constrained airspaces in Central Europe throughout the summer. This led to a shift to the west of the Southeast bound flows, with notable increases of overflights in Italy, Switzerland and western Balkan States.

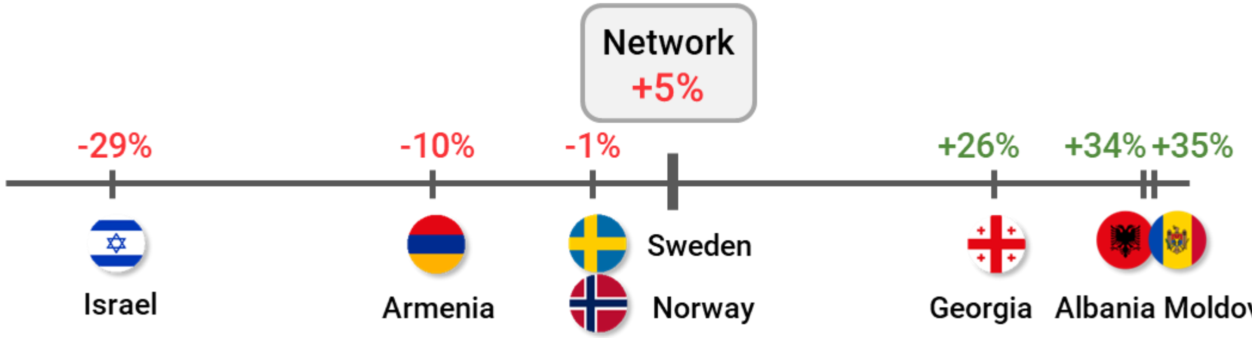
Average flights (incl. overflights) - 2024



*Based on integrated ANSP

State traffic variation

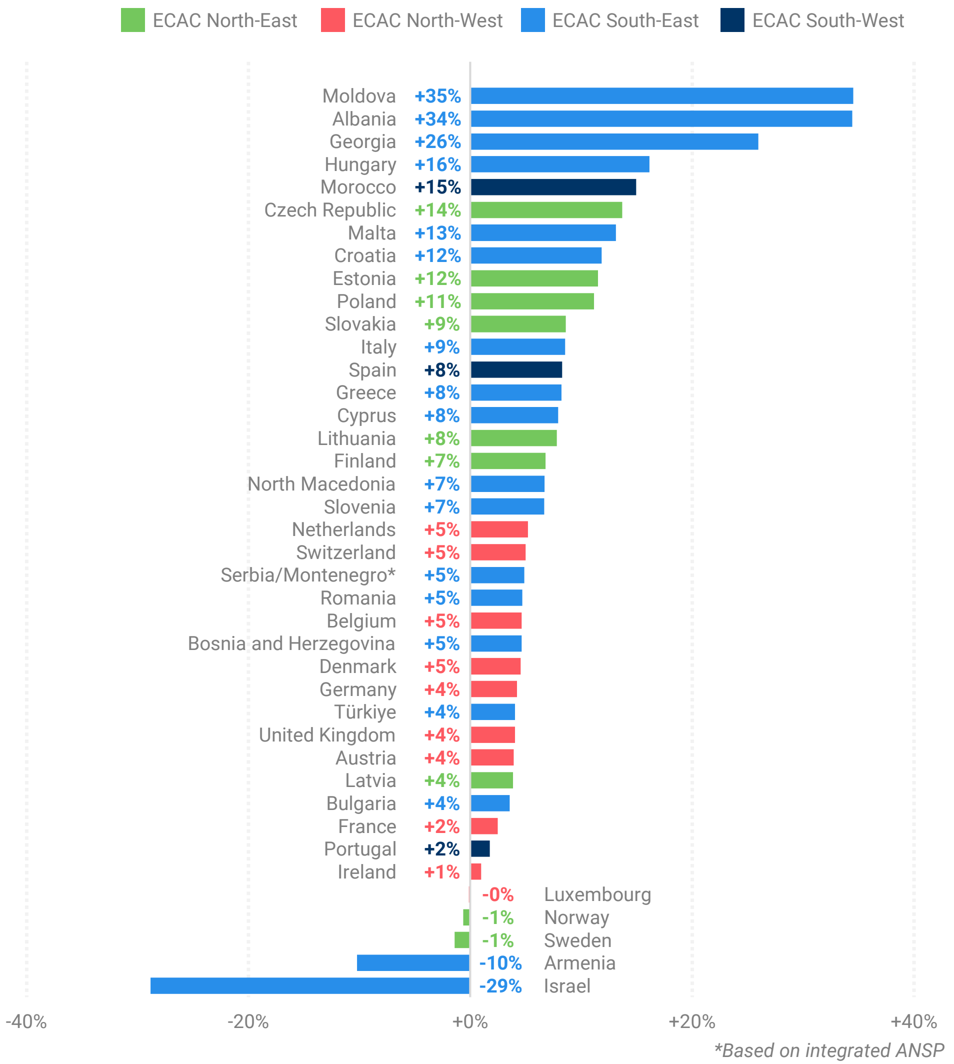
States - Top 3 +/- departure/arrival variations 2024 compared to 2023



If we zoom into States and regions, we see significant differences in performance and situation:

- **Moldova**, the less busy State in our sample, has nevertheless experienced very high flight growth (+35%) due to the dynamism of the Moldavian low-cost **FLYONE**, complemented by the increased activity of **Turkish Airlines**. Traffic on flows with Türkiye, Italy, Germany and UK increased compared to 2023.
- **Albania**, already very dynamic in 2023, recorded a solid growth of 34% in 2024 owing to the continuous expansion of **Wizz Air** and the start of **Ryanair** operations at the end of 2023.
- As a side effect of the war in **Ukraine**, **Georgia** (+26%) has also experienced very high flight growth.
- **Norway** and **Sweden** are recording slightly less flights than in 2023, owing to reduction in flights between the two States and on flows with other **Northern States** (eg Denmark, UK, Lithuania)
- **Armenia** is recording less flights (-10%) than in 2024 following high volumes in 2023 (Wizz Air expanded its operations there in 2023; these have now stabilised). Norway recorded modest growth in 2024 (+2% vs 2023); its domestic flows have slightly reduced (3% lower than in 2023, although already at 96% of 2019). This had an impact on overall growth as domestic flows account for more than half of all flights.
- At the very end of the scale, **Israel** (-29% in 2024, vs 2023) has been strongly affected by the escalation in the conflict in the Near East (started in October 2023) ; airlines reducing and suspending their flights there.

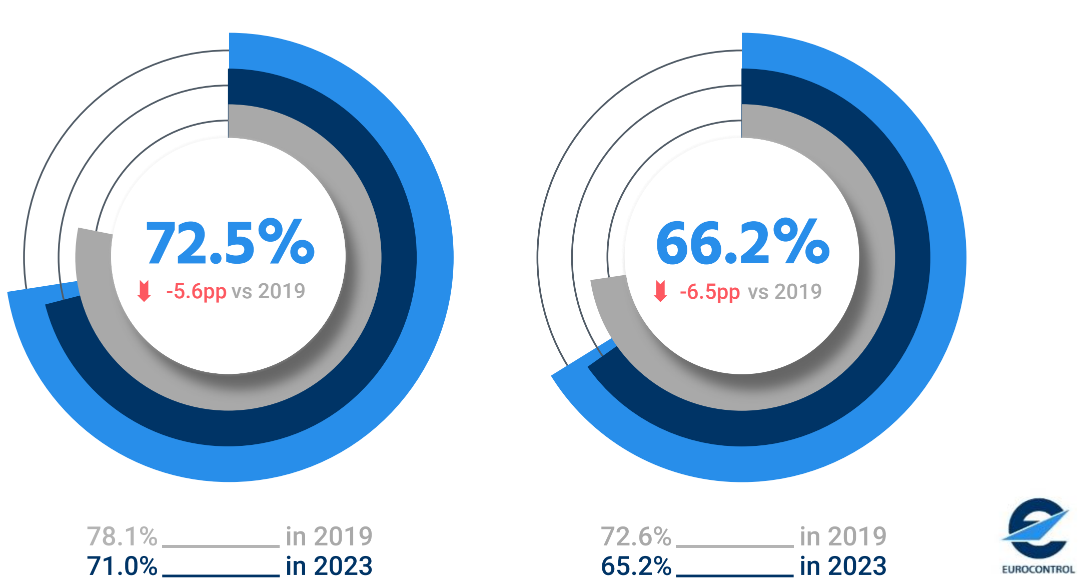
States - Traffic (departure/arrival) variations 2024 compared to 2023



- **South-East Axis** States recorded mostly double-digit flight growth in 2024 compared to 2023. This was already noted last year. **Morocco** and **Spain** are also posting sustained growth rates, as they were attractive destinations for European touristic flows.

Punctuality and all-causes delay

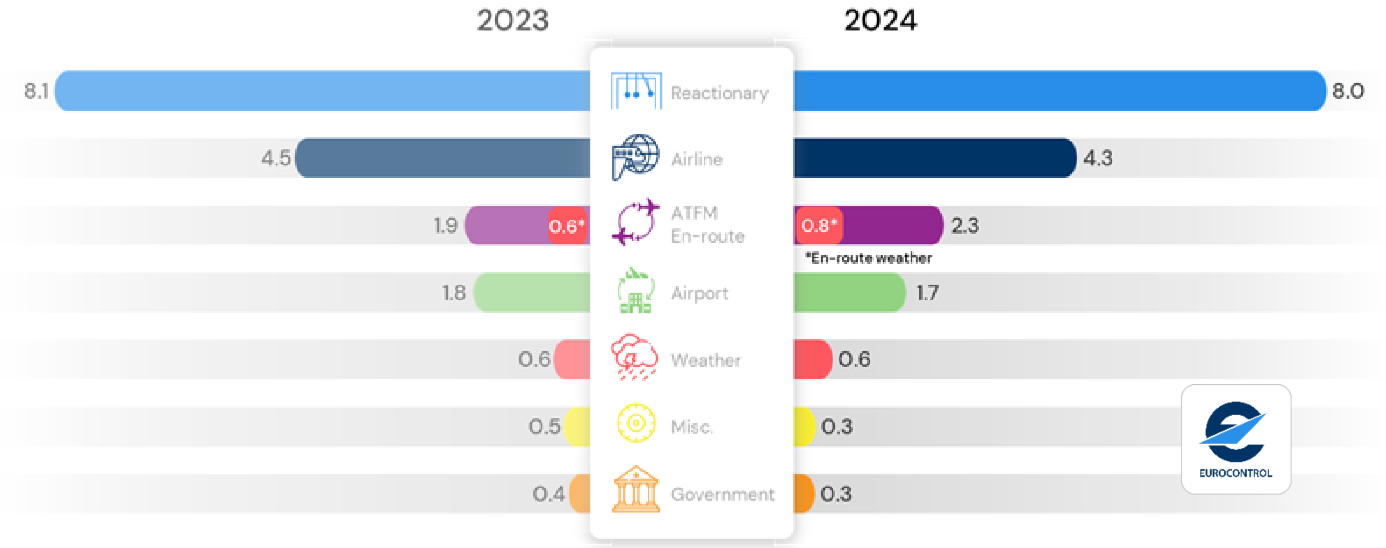
Punctuality (OTP15*) for all network scheduled flights - 2024



* Share of flights arriving/departing no later than 15 minutes after/before the scheduled time.

All causes delay drivers - Average delay per flight (min) on departure

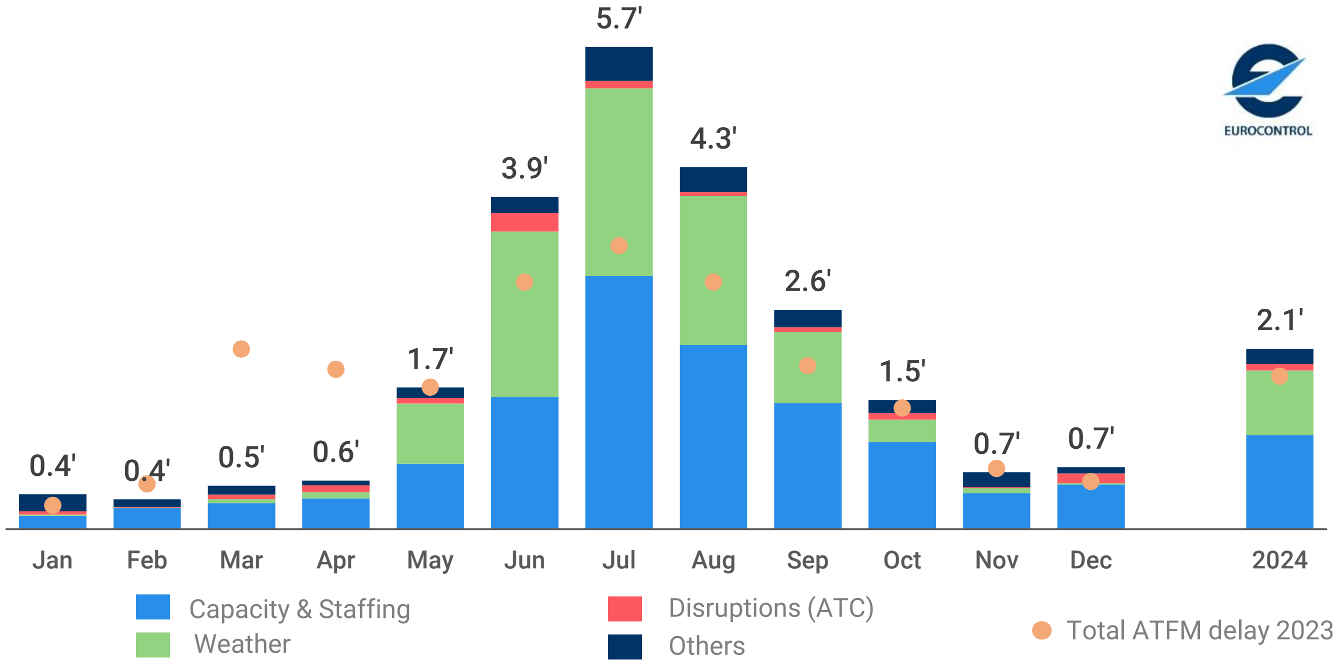
Jan-Dec 2023 and Jan-Dec 2024



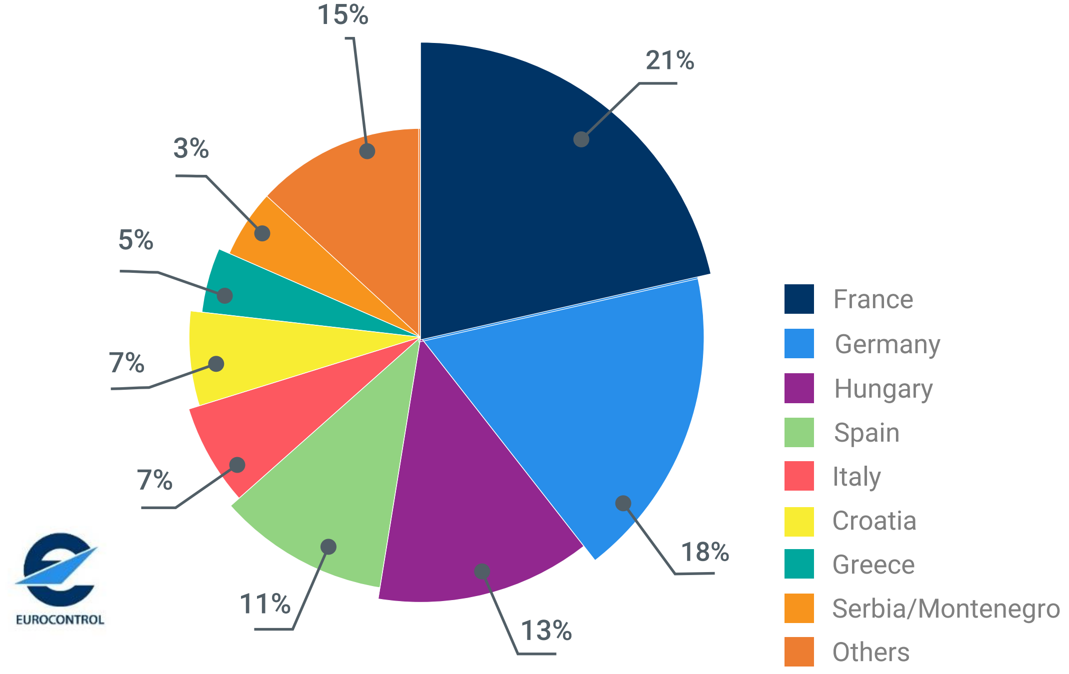
- **Arrival punctuality** for the network in 2024 was **72.5%**, slightly better (+1.5pp) than 2023, and well below 2019 (-5.6pp). **Departure punctuality** was at **66.2%** for the year, also better (+1pp) than in 2023, but significantly lower (-6.5pp) than in 2019.
- Looking at **all-causes delay**, the **average delay per flight** was broadly **stable** in comparison to **2023**. The **total** (all-causes) **average delay per flight on departure** amounted to **17.5 min/flight** for the period January to December (vs 17.4 min/flight in 2023). **Reactionary** delays remained the dominant delay reason. Airline delays (mostly turnaround/ground handling delays) slightly improved.
- The main causes of ATFM delay at airports in 2024 mostly came from weather or aerodrome capacity. London Heathrow saw frequent regulations for weather (multi-factors of high winds and low visibility), Amsterdam Schiphol saw aerodrome capacity delays, Athens also saw aerodrome capacity delays notably in summer. Some extreme weather events (heavy rain, CB activity, flooding alongside named storms like Storms Bert and Darragh) caused disruption at airports such as Barcelona and Palma as well as the UK and Ireland, respectively.

En-route ATFM delays

Monthly en-route ATFM delays per flight, per cause (in minutes per flight) - 2024



Share of en-route ATFM delays (% of minutes) - 2024

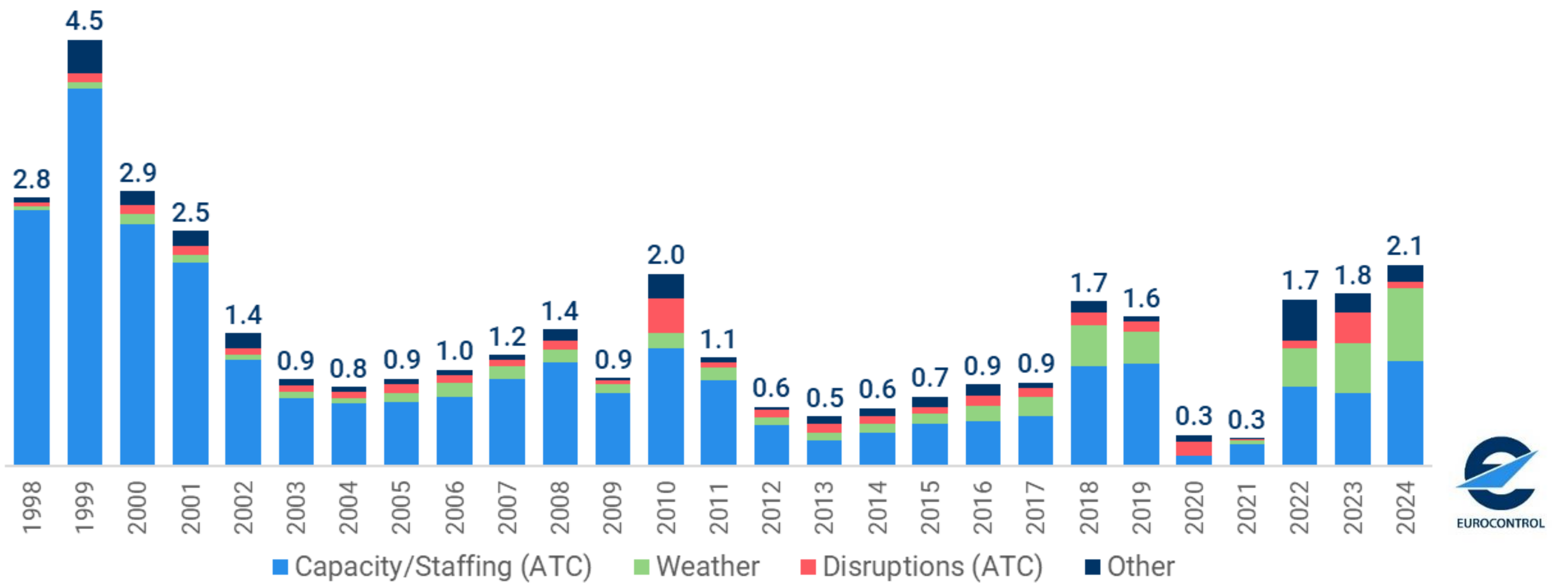


- The ANSPs' **average en-route AFTM delay** was **2.1 minutes per flight** in 2024, an increase of **+18%** compared to 2023. There were more flights to manage in the system than in 2023 (+5%).
- **Weather** and **Capacity & Staffing** issues, mainly in the South-East of Europe, were the main causes for the high en-route ATFM delays during the Summer season. The **June-to-August period** averaged the very high level of **4.6 minutes per flight**, owing to several ATC capacity shortages as well as convective activity or severe weather disruptions, leading to extensive flow measures. Moreover, military activity and changing airspace restrictions (geopolitical tensions and conflicts) affected airspace capacity and created additional complexity on operations to maintain levels of safety in air navigation services.
- The **average airport AFTM delay** was **0.7 minutes per flight** in 2024 (+4% vs 2023),

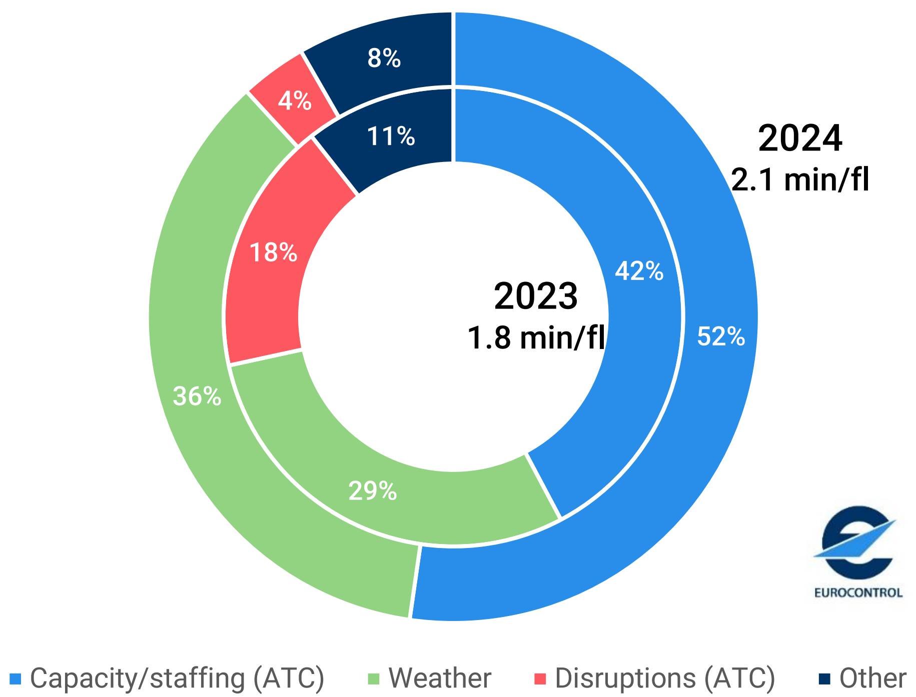
- **France, Germany** and **Hungary** accounted for half of all en-route ATFM delays.
- **France** accounted for 21% of all en-route ATFM delays, with main causes being Capacity & Staffing as well as weather and disruptions (some strikes and trial for system implementation).
- **Germany** accounted for 18% of all en-route ATFM delays. German ACCs experienced structural capacity issues to due a lack of staff, in particular in Karlsruhe UAC, which was also hit by frequent adverse weather this summer.
- **Hungary** accounted for 13% of all en-route ATFM delays. HungaroControl faced unexpected staffing issues and very high demand, partly as a result of onloads due to the unavailability of Ukrainian airspace. Adverse weather was also a major factor too.

En-route ATFM delays

En-Route ATFM delays per flight, per cause (in minutes per flight) since 1998



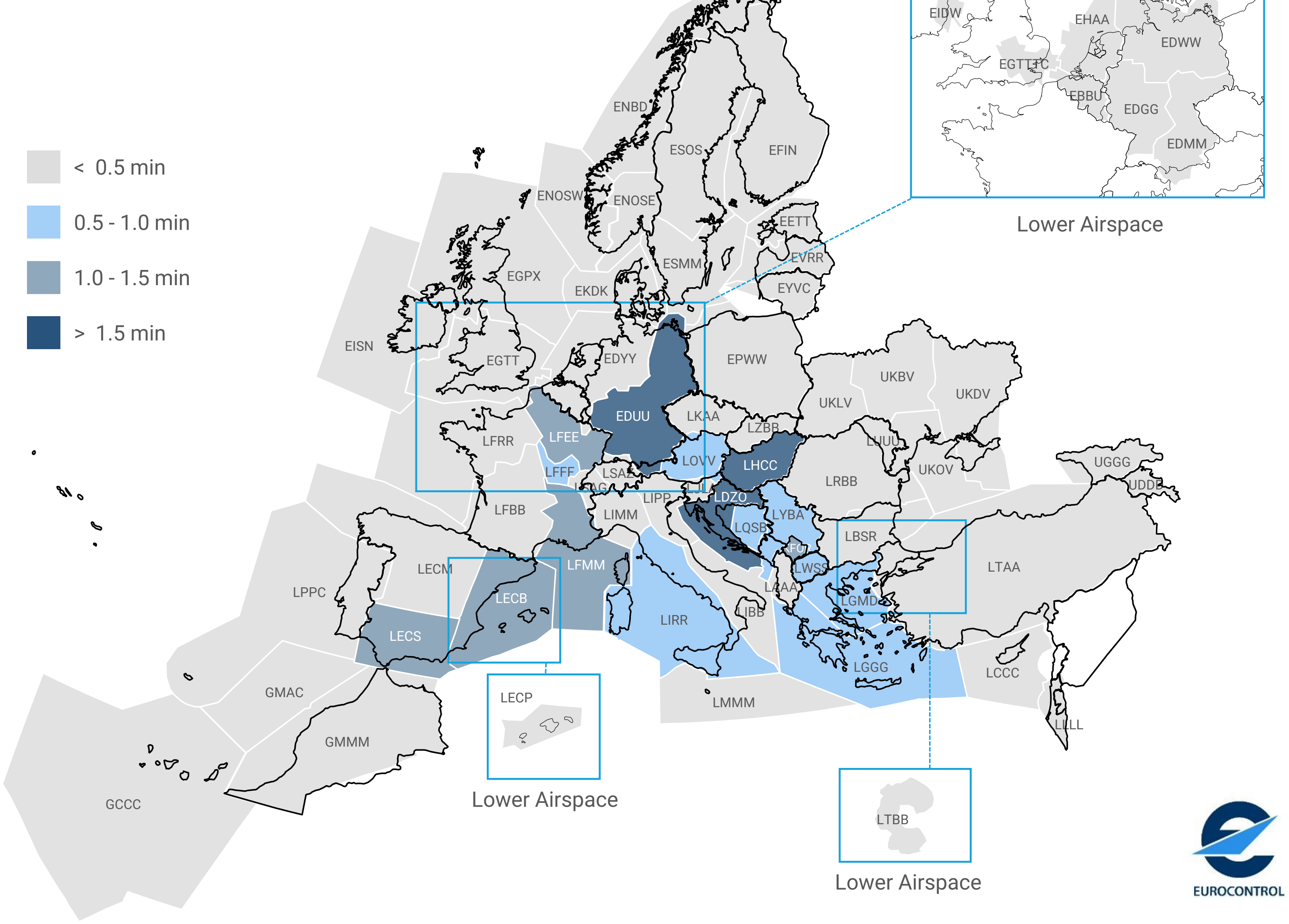
Share of En-Route ATFM delays per flight, per cause (%)



- The **en-route ATFM delays** reached **2.1 min/flight**, a **poor performance** for 2024, the worst for 23 years. The level of en-route ATFM delays surpassed the 2 min/flight peak of 2010 (ATM was affected by adverse circumstances such as the volcano crisis and the bad weather situation at the end of the year). Last time with such a **weak** performance was **back in 2001**, **before the Single European Sky** was put in place.
- This is **1.6 minutes per flight higher** than the Union-wide performance **target** set in the area of capacity.
- In 2024, **weather delays** have **reached record levels** (+50% more days vs 2023, +80% vs 2019). **Capacity & Staffing** remained the **first delay cause** as it has always been, accounting for 52% of the en-route ATFM delays. The number of days of **ATC disruptions** was relatively **low** (-72% vs 2023—French strikes--, -25% vs 2019). En-route ATFM delay owing to Capacity & Staffing cause was higher (+34%) than last year but in line with 2019 levels.
- The Hungarian airspace saw more traffic and almost daily regulations due to the unavailability of Ukraine airspace. A series of French ATC industrial actions also affected the network in 2024, notably in April and May. Capacity & Staffing delays were mostly recorded in France, Germany and Spain

En-route ATFM delayed flights per Area Control Centre

Delay per flight - 2024



Three ACCs finished the year with en-route ATFM delays per flight **higher than 1.5 min/flight**:

- **Budapest** (2.7 min/flight), capacity/staffing issues (44%) compounded by high demand partly due to the unavailability of Ukrainian airspace (33%). This further complicated by adverse weather (23%).
- **Zagreb** (1.7 min/flight), mainly caused by adverse weather (54%) during the summer months and capacity delays (42%) due mostly to high demand.
- **Karlsruhe** (1.6 min/flight), recurring capacity/staffing issues (53%) and adverse weather (44%).

Five ACCs posted en-route ATFM delays per flight **between 1 and 1.5 min/flight**:

- **Marseille** (1.3 min/flight), recurring staffing issues (46%) and adverse weather (28%).
- **Sevilla** (1.3 min/flight), capacity issues (85%) partly due to unexpected high demand.
- **Reims** (1.2 min/flight), recurrent capacity/staffing issues (61%) and adverse weather (34%).
- **KFOR Sector** (1.0 min/flight), mostly owing to capacity delays (97%).
- **Barcelona** (1.0 min/flight), capacity delays (67%) further complicated by adverse weather (29%).

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Aircraft operator traffic

Top 10 aircraft operators - 2024 average daily flights, compared to 2023 and 2019

No.	Aircraft operator	Average daily flights	% prev year	% 2019
1.	Ryanair Group	3,044	+8%	+31%
2.	easyJet Group	1,553	+5%	-7%
3.	Turkish Airlines Group	1,435	-0%	+8%
4.	Lufthansa Airlines	1,144	+1%	-23%
5.	Air France Group	999	+1%	-17%
6.	KLM Group	860	+8%	+0%
7.	Wizz Air Group	838	+3%	+42%
8.	British Airways Group	827	+5%	-9%
9.	SAS Group	611	-1%	-25%
10.	Vueling	609	+3%	+1%

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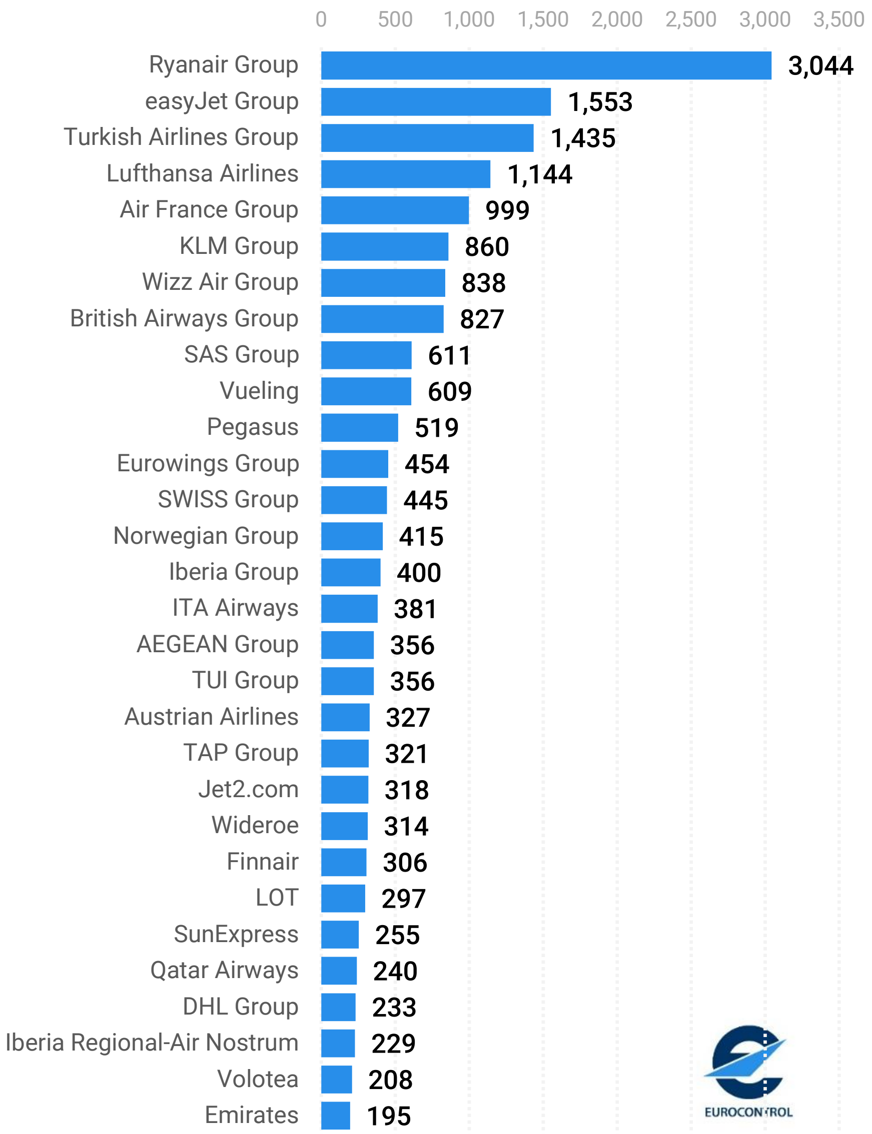
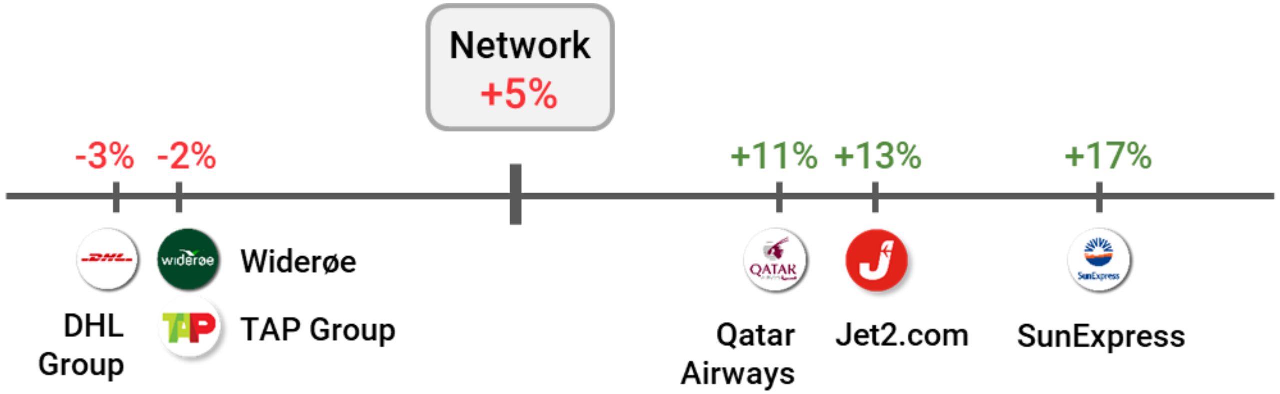
- **Ryanair** finished in top position for the tenth year running with 3,044 daily flights. The group closed 2024 well above 2019 levels (+31%), showing traffic growth of 8% compared to 2023.
- The 2024 top 10 operators are the same as in 2023. The only change is **KLM Group** overtaking **Wizz Air** into 6th place.
- **Ryanair Group** (+8%) increase is mostly owing to strong increase on flows Albania <-> Italy, Spain <-> UK or Italy <-> Spain. **KLM Group** posted an +8% increase too, mainly owing to increases on flows between Netherlands and UK, Germany and Italy. **Turkish Airlines Group** recorded a 0.5% decrease, notably affected by the important decrease on the domestic flows in Türkiye and the reduction of flights between Türkiye and Israel. **SAS Group** posted a 1% decrease mostly due to decreases of domestic flows in Norway and Sweden.
- Half of the aircraft operator groups in the top 10 recovered or surpassed their **2019 traffic levels**, including three low-cost carriers (**Wizz Air Group** +42%, **Ryanair Group** +31% and **Vueling** +1%). The five remaining operators were still between 25% (**SAS Group**) and 7% (**easyJet Group**) below pre-COVID levels.
- As for the **top 30** operators in 2024, there is **no change in composition** with respect to 2023. Some minor ranking changes: **Austrian Airlines** and **Jet2.com** moved 2 places up while **Widerøe**, **LOT** and **DHL Group** moved two places down.

Top 30 aircraft operators - 2024 average daily flights



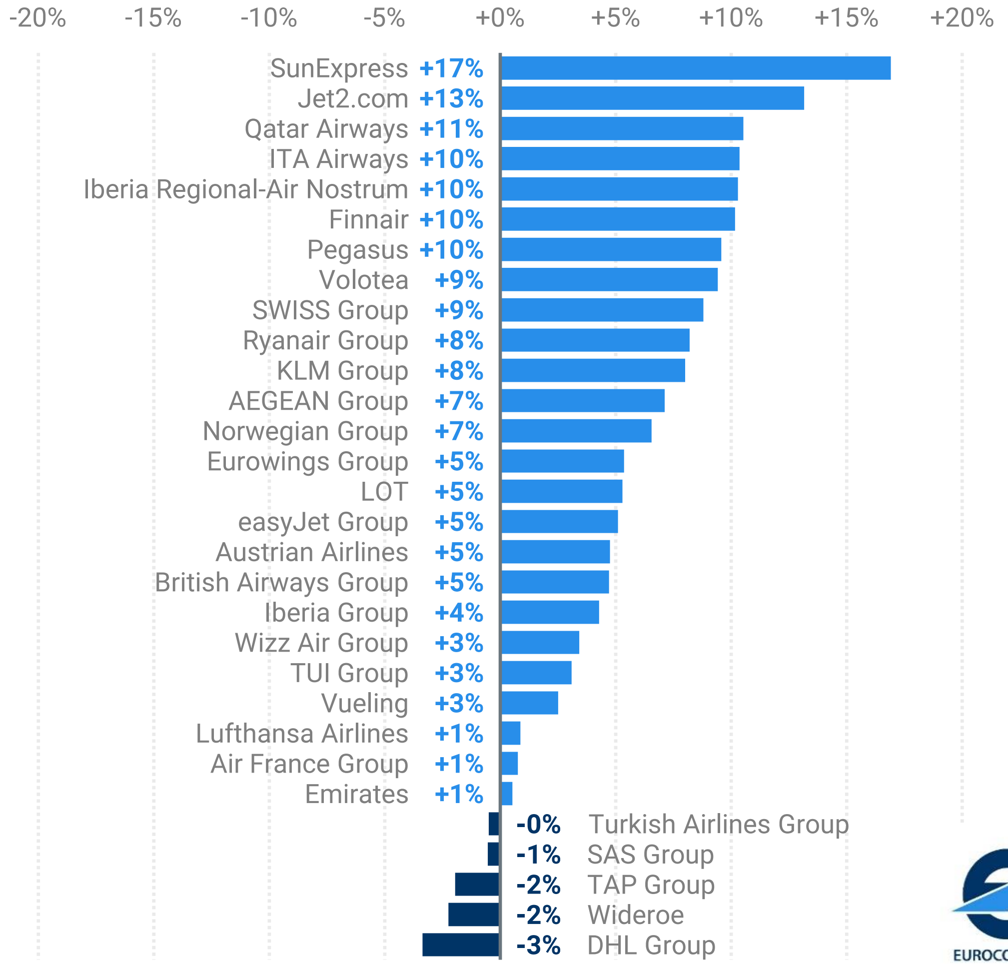
Aircraft operator traffic variation

Top 30 aircraft operators - Top 3 +/- traffic variations 2024 compared to 2023



- The most dynamic aircraft operators in 2024 show a **mix of types** of carriers between mainline, low-cost or regional operators.
- In 2024, **Sun Express** posted the largest increase (vs 2023) among the top 30 operators (+17%) owing to its important flow expansion between Türkiye and UK or Germany. **Jet2.com** (+13%) increased notably its capacities on flows between UK and Spain, Türkiye and Greece. **Qatar Airways**, with an 11% growth, has increased its number of flights between its home country and UK, Italy or Germany.
- All top 30 airlines but five operators posted increases with respect to 2023. Although **DHL Group** is 23% above its pre-pandemic levels (+23% vs 2019), the cargo airline recorded a 3% decrease in this top (some capacity cuts in the UK). **Widerøe** has slightly decreased (-2%) in 2024 while recording declines notably on domestic flow in Norway but also on flows between Norway and Sweden, UK or Denmark. **TAP Group** , still at 86% of 2019, posted a decrease on last year's levels (-2%) notably due to decreases on flows between Portugal and Spain, Israel or UK.

Top 30 aircraft operators - Traffic variation 2024 compared to 2023



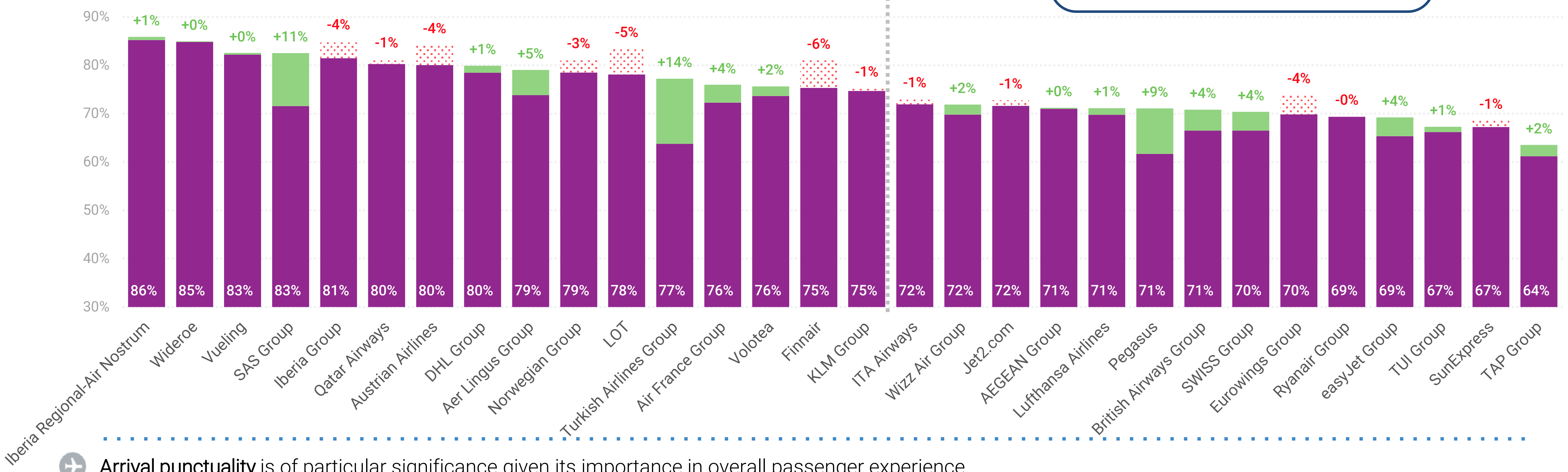
Aircraft operator arrival punctuality

Arrival punctuality of top 30 European aircraft operators

1 Jan - 31 Dec 2024 vs same period of 2023

Network level:

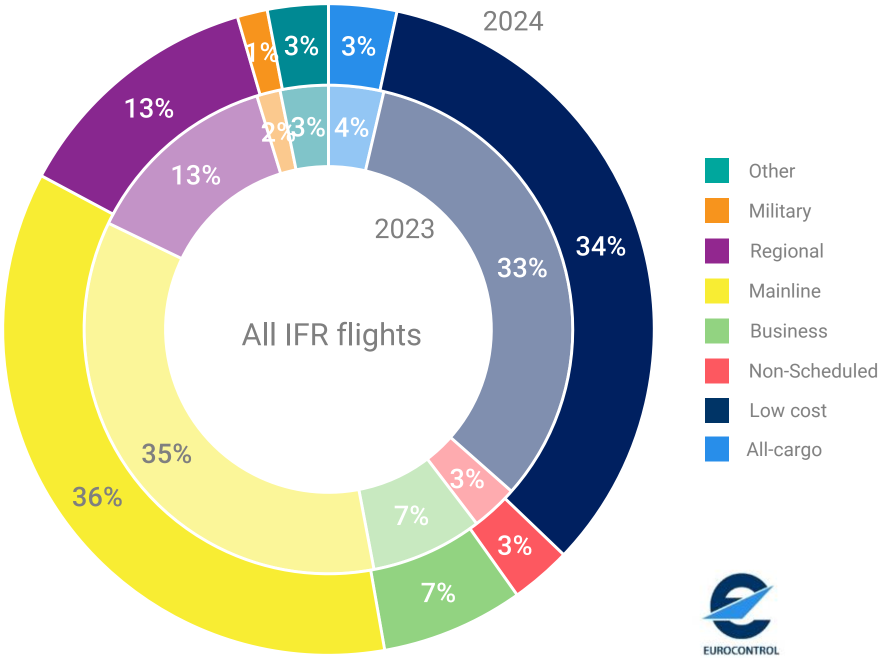
2019	2023	2024
78%	71%	73%



- **Arrival punctuality** is of particular significance given its importance in overall passenger experience.
- At network level, arrival punctuality in 2024 was slightly higher than in 2023 (**73%, +1pp)** despite 5% more traffic. However, we are still far from 2019 levels (78%).
- Five operators posted **arrival punctuality higher than 80% - Iberia Regional** (86%), **Widerøe** (85%), **Vueling** (83%), **SAS Group** (81%) and **Iberia Group** (81%). At the bottom of the list are TAP (64%), Sun Express (67%), TUI Group (67%) easyJet Group (69%) and Ryanair Group (69%).
- If we look at the **variation compared to 2023**, 15 operators improved their arrival punctuality whereas it deteriorated for 11. Turkish Airlines (+14pp), SAS Group (+11pp) and Pegasus (+9pp) recorded the largest improvements, whereas Finnair (-6pp) and LOT (-5pp) posted the largest deteriorations.
- If we **compare with 2019**, only Vueling, SAS Group, Norwegian and LOT show marginal improvements. Arrival punctuality decreased for all other operators.

Market segments

Average share of total flights

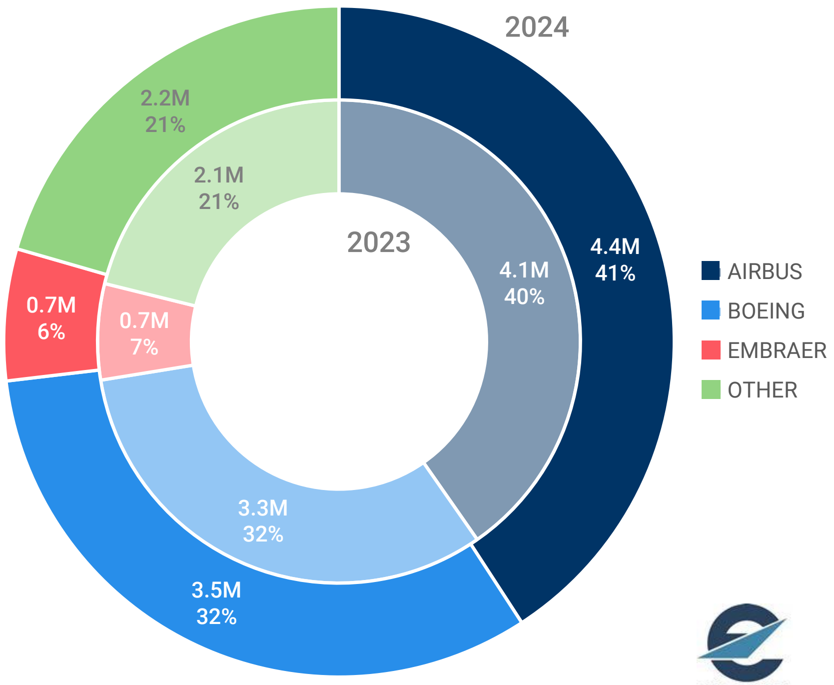


No.	Market segment	Avg. flights	% prev year	% 2019
1.	Mainline	10,395	+7%	-6%
2.	Low Cost	9,865	+8%	+3%
3.	Regional	3,700	+2%	-19%
4.	Business	2,065	+1%	+10%
5.	All-cargo	987	-2%	-1%
6.	Other	881	-0%	-2%
7.	Non-Scheduled	880	+2%	-16%
8.	Military	437	+1%	+6%

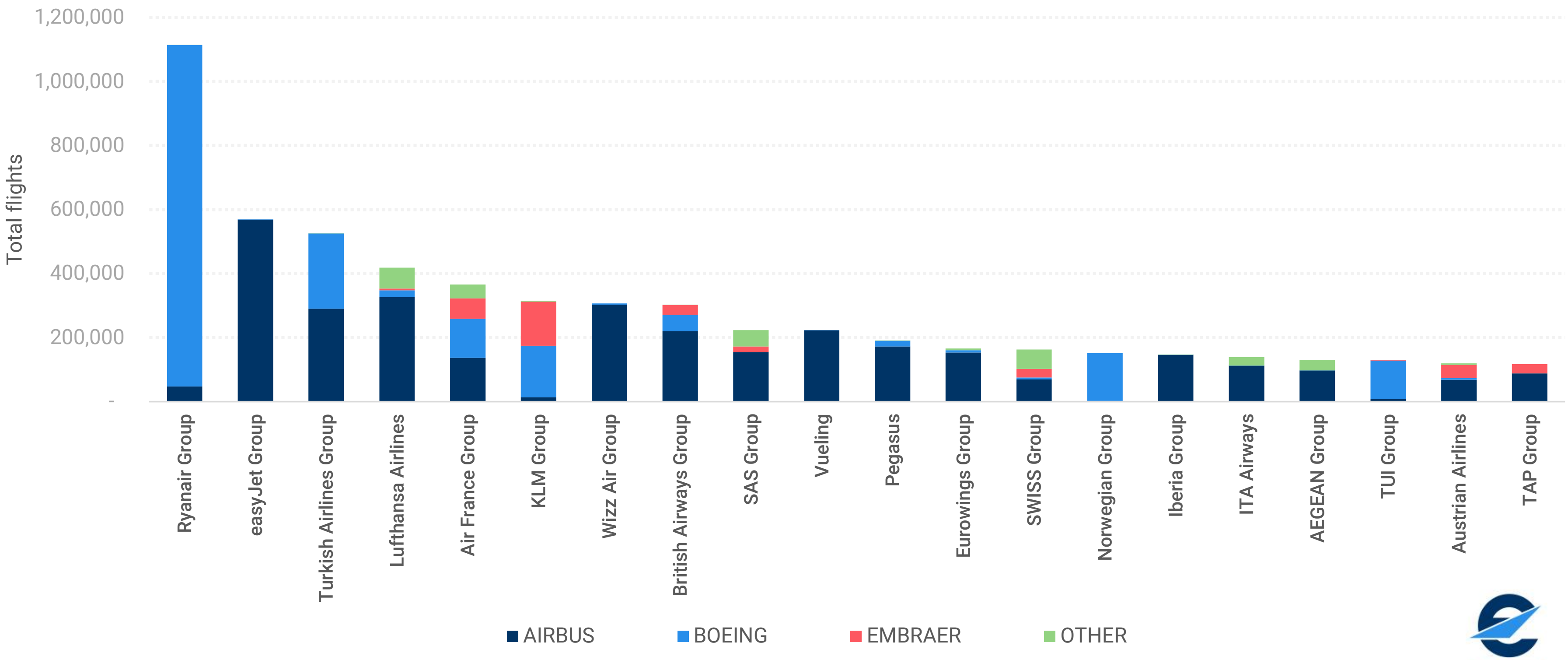
- 2024 saw the **Mainline** segment continue to recover, **increasing** by +7% vs 2023. Mainline operators thus remained **first** in terms of **market share** (**36%**), expanding by 1pp in 2024 (vs 2023). However, Mainline is still 6% **below 2019**, mostly due to the weakness of domestic markets such as Germany, France, Italy and Norway, the weakness of flights between the North-West European States as well as lost connections between European States and Russian Federation.
- **Low-cost** airlines also **increased** their **market share** to **34%** (from 33% in 2023) with a traffic **increase** of **+8%**. They are, now **above** their **2019** levels (+3%) owing to expansion of domestic flows in Italy and Spain, and also on flows between Türkiye and several countries.
- The **Regional** segment maintained its **market share** of **13%** as in 2023. The segment posted an increase of +2%, however, it remains the segment farthest from its 2019 levels (-19%). Some traditional routes have seen lower demand due to a combination of factors – increased ticket prices, train/bus competition, government initiatives and environmental campaigns.
- The **Non-scheduled** segment (**3%** of all flights) recorded a 2% increase vs 2023 but remains 16% below 2019, impacted by the cessation of flights to/from Russia and, near-East conflicts.
- After a decline in 2023, **Business aviation** (**7%** of all flights) and **Military** (**1%** of all flights) flights posted a weak increase (+1%, each) in 2024.
- All-Cargo segment recorded another year of decline in 2024 (vs 2023) ; its market share lost 1pp to **3%**.

Aircraft manufacturers

Share of flights by aircraft manufacturer



Flights of the top 20 aircraft operators by Aircraft Manufacturers



- At European level, **41%** of all **flights** in **2024** were operated by **Airbus** aircraft compared to **32%** by **Boeing** aircraft. The third manufacturer in terms of operated flights is Embraer (6%).
- **Airbus's market share increased** by **1** percentage point from 2023 to 2024, whereas **Boeing's** market share remained **stable**.
- The situation varies across the top 20 aircraft operators, where Airbus' share at 55% is much larger than Boeing's share at 34%.
- In 2024, the share of **new generation aircraft** was **27%** for **Airbus** (neo) and **16%** for **Boeing** (MAX). Both shares have increased by 2 and 4 percentage points respectively compared to 2023.

Airport traffic

2024 average daily departure/arrival, growth vs 2023

Top 10 airports

2024 average daily dep/arr, vs to 2023 and 2019

See more

No.	Airport	Avg. daily dep/arr flights	% 2023	% 2019
1.	Istanbul	1,401	+2%	n/a
2.	Amsterdam	1,336	+6%	-4%
3.	London Heathrow	1,302	+4%	-1%
4.	Paris Charles de Gaulle	1,275	+2%	-8%
5.	Frankfurt	1,204	+2%	-14%
6.	Madrid Barajas	1,148	+8%	-2%
7.	Barcelona	951	+9%	+1%
8.	Munich	887	+8%	-22%
9.	Rome Fiumicino	862	+18%	+2%
10.	London Gatwick	725	+3%	-7%

- The top 10 airport list remained unchanged compared to 2023. Istanbul finished the year in top position for the third year in a row with 1,401 average daily flights.
- Amsterdam outpaced Heathrow for the second spot with 1,336daily flights, 6% higher than in 2023.
- London Heathrow finished third with 1,302 daily flights, 4% .
- Paris CDG and Frankfurt complete the top five with 1,275 and 1,204 daily flights respectively.
- Rome Fiumicino (9th) closed the year with the highest traffic increase of the top 10 airports compared to 2023 (+18%). Barcelona and Rome have recovered their 2019 levels. Barcelona established a new airport record with 1,173 flights on 21 June 2024.

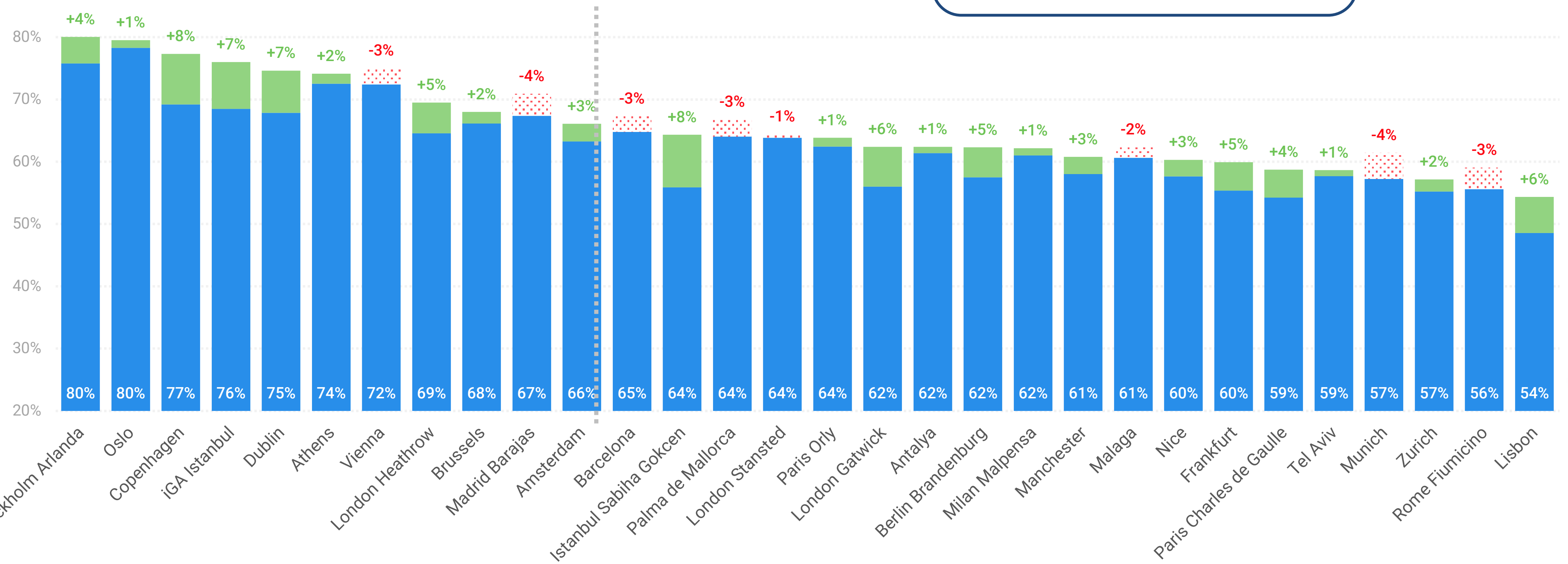
Airport departure punctuality

Departure Punctuality of top 30 European airports

1 Jan - 31 Dec 2024 vs same period of 2023

Network level:

2019	2023	2024
73%	65%	66%

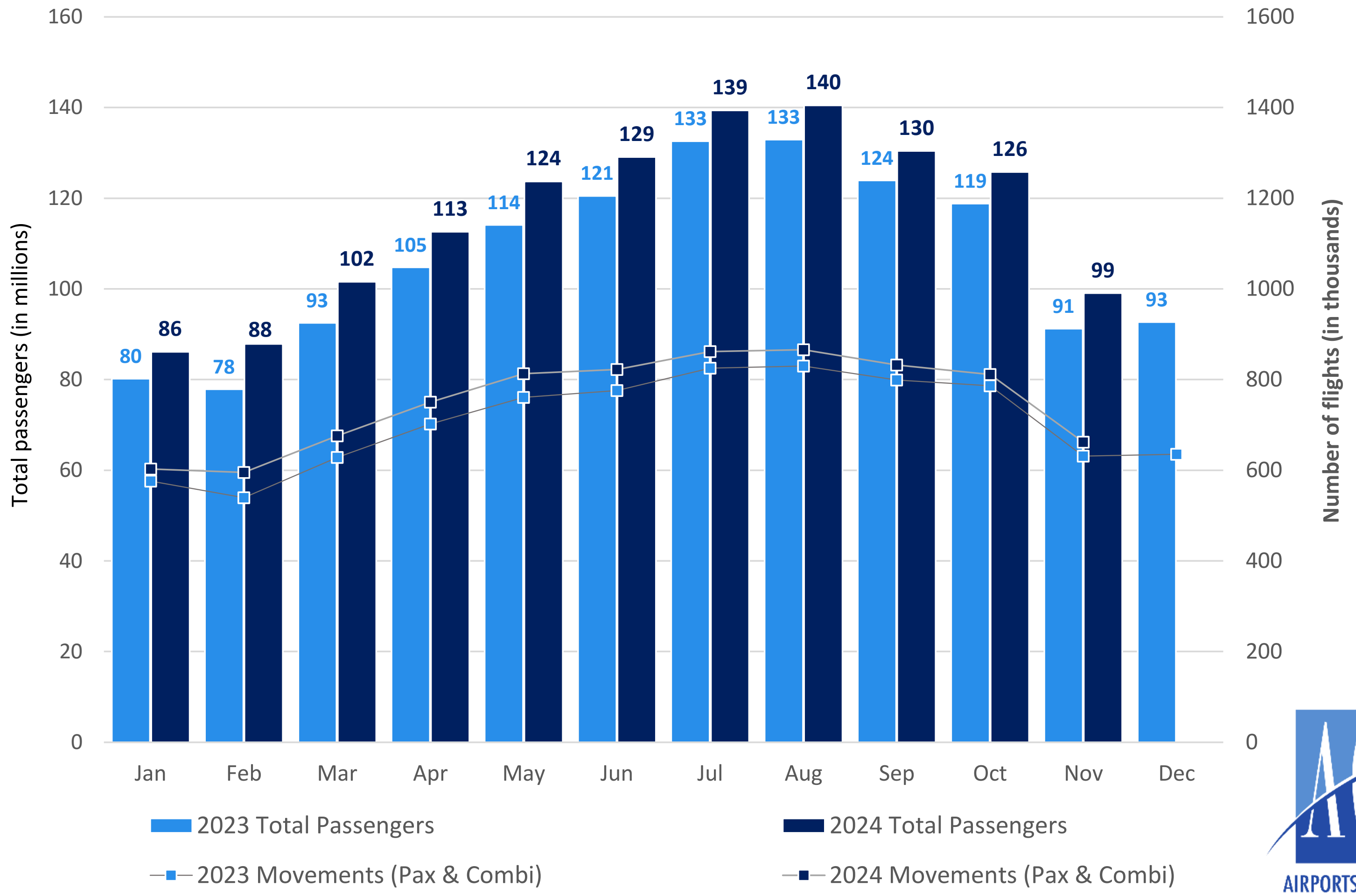


- **Departure punctuality** for all airports in the network in 2024 was **66.2%**, 1pp better than in 2023. The deterioration is much more significant (-6.5pp) when comparing with 2019.
- In 2024, 22 out of 30 airports posted departure punctuality **improvements** compared to 2023: Copenhagen (+8pp), Istanbul Sabiha Gökçen (+8%), Istanbul (+7%) and Dublin (+7%).
- The largest **deteriorations** compared to 2023 were recorded at Madrid (-4pp), Munich (-4pp), Vienna (-3pp), Barcelona (-3pp) and Palma de Mallorca (-3pp).
- All 30 airports, except Dublin, posted worse departure punctuality than in 2019, with decreases larger than 10pp for nine of them, while traffic was higher in only five airports.

Top 40 European airports: passengers

2024

Passengers and flights at ECAC top 40 Airports



AIRPORTS COUNCIL INTERNATIONAL

Europe's airport network as a whole has now exceeded pre-pandemic traffic levels: **Airports Council International Europe** estimates that **2024** will close with **2.5 Billion passengers in Europe***, 37 million more passengers (**+1.5%**) compared to **2019** levels.

Based on ACI Europe **passenger** data (December 2024 not yet available), and for the **top 40 European airports**:

- The **number** of **passengers**** was **1.28 billion** over the period January to November 2024, +**7%** more than in **2023**, while the number of corresponding flights amounted to 8.29 million, a +6% increase on 2023. The respective **recovery** rates **on 2019** levels were **101%** in **passenger numbers** and 94% for flight movements.
- **In 2024, certain aircraft operators** were operating **above** their **2019 levels** in terms of **seats**, mainly thanks to new aircraft models (e.g. neo).
- During the first quarter of 2024, the number of passengers at the top 40 airports was already nearing the 2019 levels (Jan: +97%, Feb to Apr +99%). The monthly growth rate progressively levelled off from May onwards, above 100%,, and average 102% over the period September-November.

*: Europe for ACI covers 55 States, ACI EUROPE has recently expanded their monthly coverage to include over 450 airports, representing over 95% of European airport traffic.

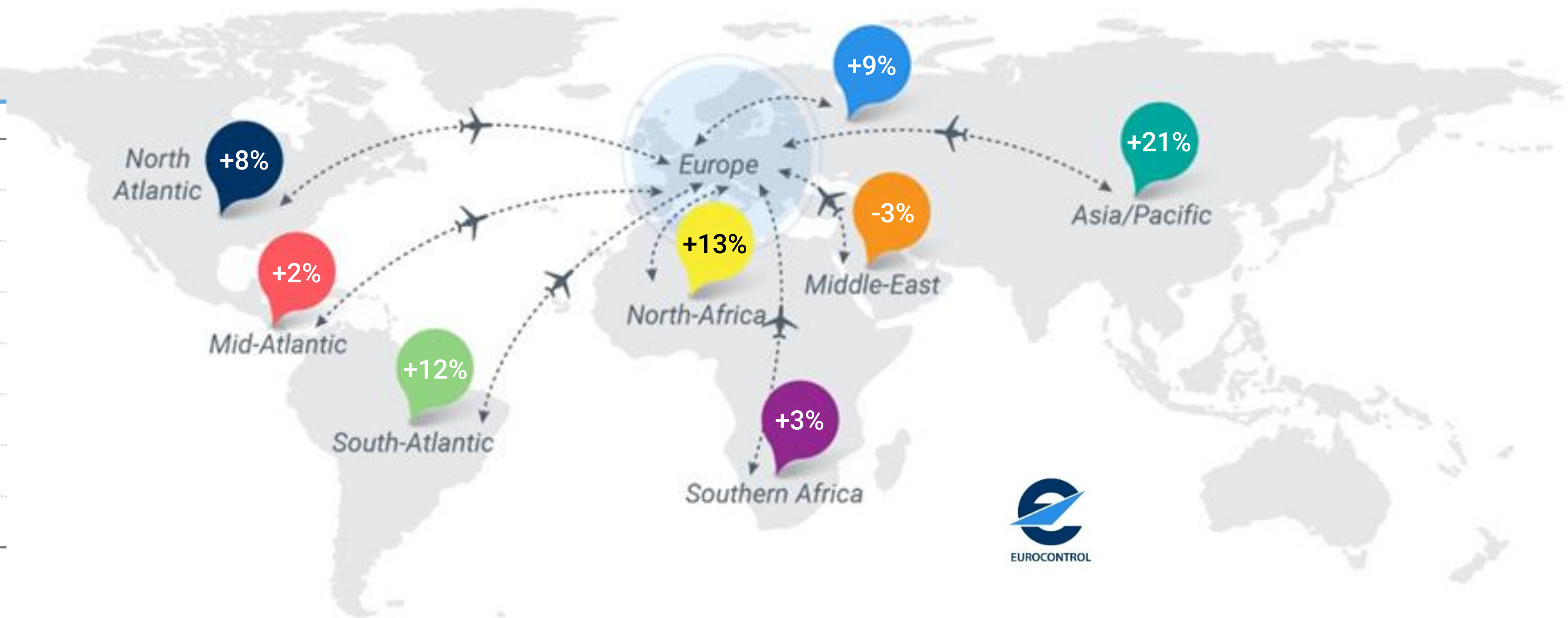
**: Passengers comprise International enplaned + deplaned, Domestic enplaned +deplaned, as well as Transit passengers (counted once).

Traffic flows

Average daily departure/arrival flights for 2024

Region	Average daily flights	% previous year	% 2019
Intra-Europe	**22,588**	▲ +4%	▼ -2%
Europe ↔ Middle-East	1,357	▼ -3%	▼ -5%
Europe ↔ North Atlantic	1,329	▲ +8%	▲ +12%
Europe ↔ North-Africa	1,239	▲ +13%	▲ +21%
Europe ↔ Asia/Pacific	858	▲ +21%	▲ +8%
Europe ↔ Other Europe	364	▲ +9%	▼ -65%
Europe ↔ Southern Africa	305	▲ +3%	▼ -2%
Europe ↔ Mid-Atlantic	178	▲ +2%	▲ +3%
Europe ↔ South-Atlantic	193	▲ +12%	▲ +4%
Non Intra-Europe	**5,823**	▲ +8%	▼ -5%

Percentage (%) of change 2024 vs 2023



- The **main** traffic flow was **intra-European** with 22,588 daily flights in 2024, more (+4%) than the previous year. **Intercontinental** flows resulted in 5,823 daily flights on average in 2024, increasing by +8% in 2023.
- The **second**-largest **regional** flow is between Europe and the **Middle East**: 1,329 average daily flights in 2024, **3%** fewer flights than in 2023. The decline is driven by the conflicts in the near-East in **Israel** (-30% in 2024 vs 2023), **Lebanon** (-20%), **Jordan** (-21%) and **Oman** (-10%).
- The **third**-largest regional flow is to/from the **North Atlantic**, with 1,329 daily flights, recording an **8%** increase compared to 2023.
- The **fourth** flow is to/from **North Africa**, with 1,239 flights per day, a double digits increase (+13%) vs the previous year, owing to growing flows to/from **Morocco** (16%), **Egypt** (12%) and **Tunisia** (+13%).
- Flows between Europe and **Asia/Pacific** posted a 21% increase in 2024 (vs 2023) and have now recovered compared to 2019 (+8%). European flows with **China** (including Hong Kong) have continuously recovered and reached 278 average daily flights in 2024 (+49% vs 2023).
- Flows with Other Europe (including the **Russian Federation**) remain massively reduced at -65% compared to 2019.

Sustainability: CO_2 emissions and excess fuel burn

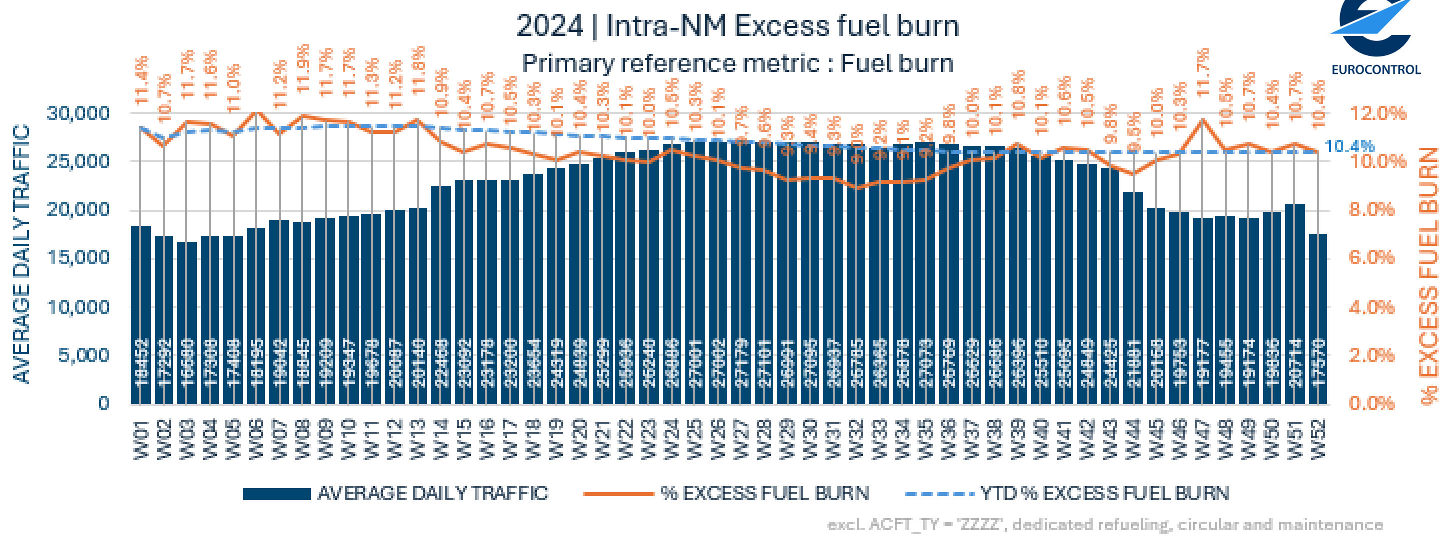
2024, Intra-Europe

92 M tonnes
(departing flights)
+7% vs 2023
-8% vs 2019

EUROCONTROL

8.4 M departures
+4% vs 2023
-10% vs 2019

Source: EUROCONTROL Network Manager

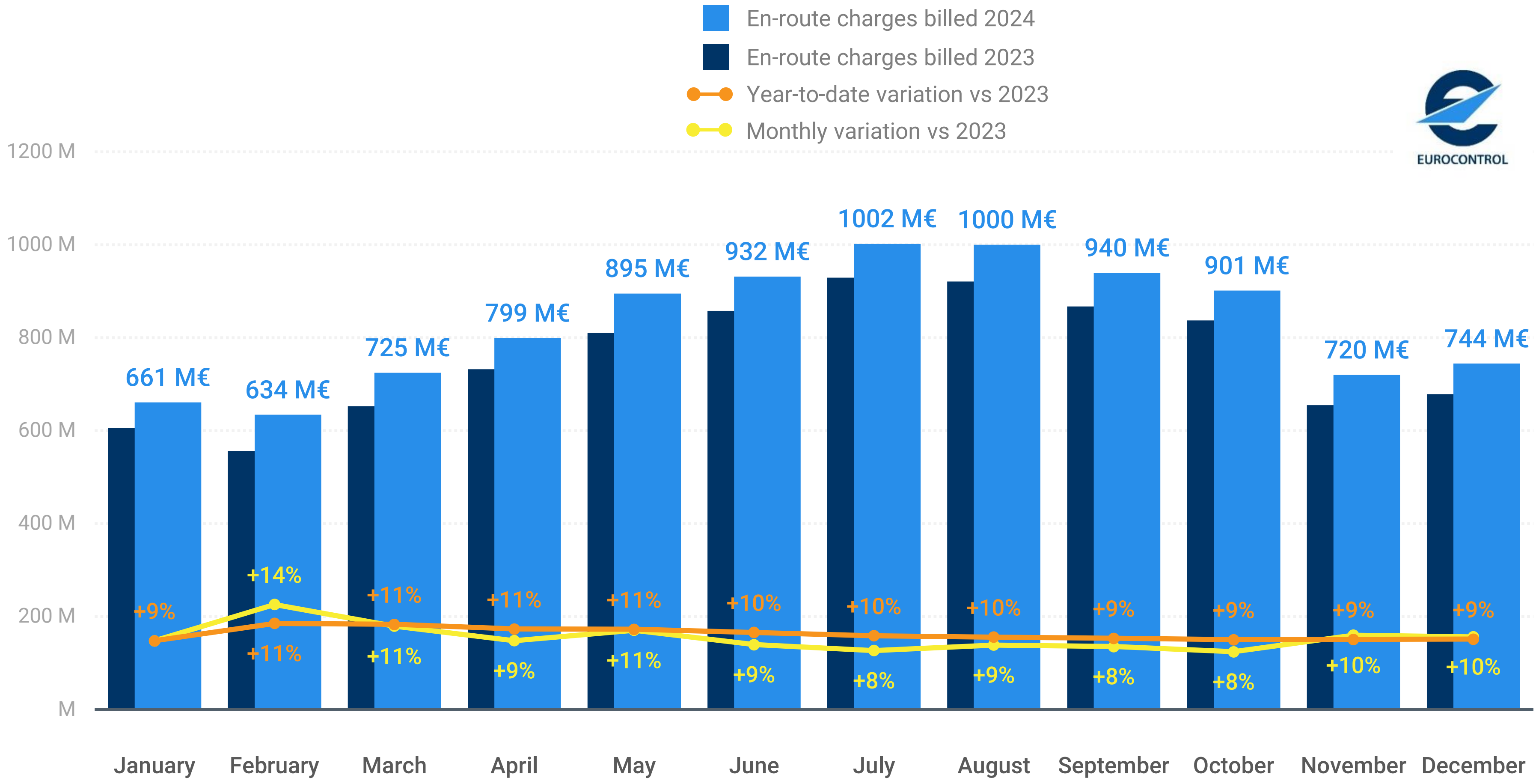


Excess fuel burn is calculated as the percentage of additional fuel consumed above the ideal fuel burn, which serves as a reference metric. The ideal fuel burn represents the 10th percentile of fuel consumption for all intra-NM Area airport-pair and aircraft type combinations observed over the previous two years. In practical terms, an aircraft type that achieves the ideal fuel burn for a specific airport-pair is considered to have zero excess fuel burn and is operating within the top 10% of fuel efficiency for that airport-pair and aircraft type. More details about the metric here

- In **2024** and focusing on the intra-Europe (NM Area), **CO_2 emissions** for flights were **7% higher** than in **2023**, whereas the **flights** responsible for these emissions were **4% above** 2023 levels.
- Compared to 2019, **CO_2 emissions** were **8% below** 2019 levels, as **flights** were too (10% below).
- The **Excess Fuel Burn** operational indicator measures fuel inefficiency corresponding to the actions of all stakeholders per city pair. The right-hand figure shows how the **indicator** has **remained** between **9%** and **11.8%** over **2024.**
- During **May and June**, with an average of approximately **25,700 daily flights** within Europe (NM Area), Excess Fuel Burn averaged **+10.2%**. This was influenced by several factors, including weather-related flow measures driven by convective activity, capacity and staffing constraints, and the added complexity of military traffic. During the busier **July to October** period, daily flights increased to approximately **26,400**, and the Excess Fuel Burn indicator showed a slight improvement, averaging **+9.7%.** This trend is attributed to the increased use of more efficient narrow-body aircrafts during the summer months.
- During the **Winter schedule** (the final 8 weeks of the year), intra-European traffic volumes remained low, averaging approximately **19,500** flights per day. However, Excess Fuel Burn increased to an average of **+10.6%.** This increase was attributed to severe weather events, including Storm Bert, which led to a notable spike in excess fuel burn during week 47, and Storm Darragh, both of which brought heavy rain and strong winds, further impacting operational efficiency.

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

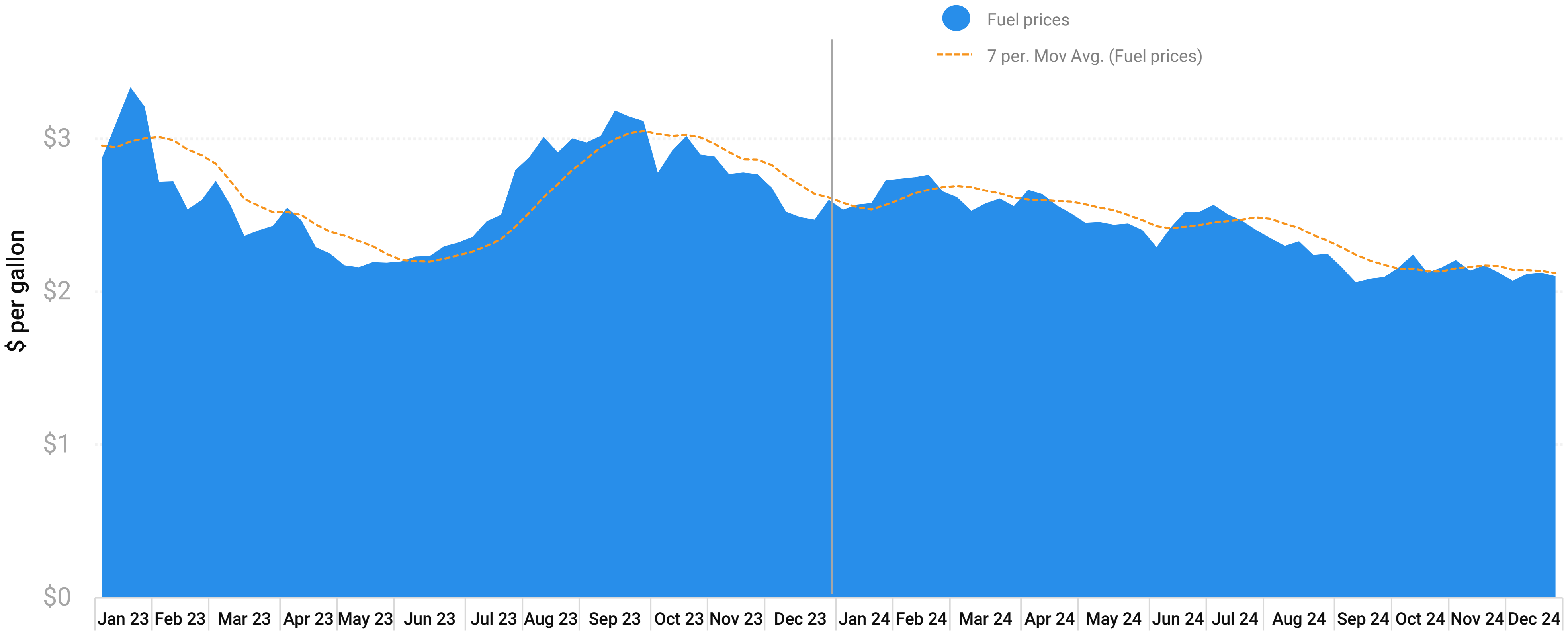
2024 amount billed: 9,951 M€ (+9% vs 2023)



- En-route charges billed in **2024** amounted to **9,951 M€, 9% more (0.858 M€) than in the same period of 2023.** This amount is also 26% (2,055 M€) more than in the same period of 2019.
- The increase of +9% vs 2023, with flights being 5% above can be explained as follows:
  - The average **distance** per flight has increased by **+1%**,
  - The average **aircraft weight** per flight has increased by **+2%**,
  - The average **en-route unit rate** has increased by **+3%** (in nominal terms).
- It should be noted that, since 2023, a part of the increase in Unit Rates includes the 2020-2021 under-recoveries, covering almost all SES States. This will still be the case for 2025 Unit Rates.
- The variation with respect to 2019 is mostly due to an increase in Unit Rates (+21%).

Jet fuel price (Europe)

2024



Source: IATA/Platts

2024
avg fuel price:

$2.39 /gallon

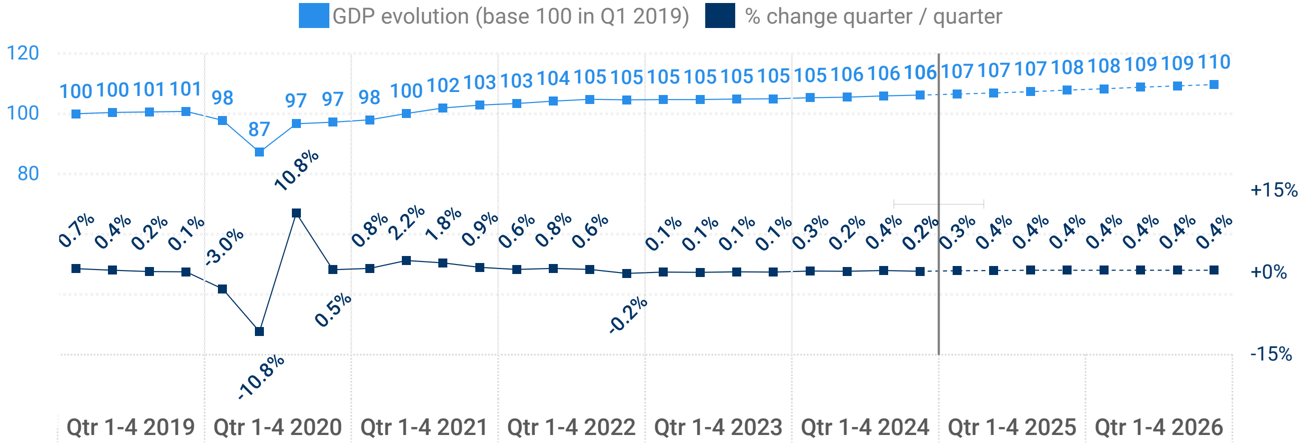
-10%
vs. $2.66 /gallon
2023

Source: IATA/Platts

- The average **price** of **jet fuel** was at **$2.39**/gallon in 2024, **10% lower** than in 2023 ($2.66/gallon).
- Based on a moving average trend, 2024 fuel prices in Europe started 2024 at around $2.6/gallon, slightly increased during the first quarter and ended the year down to $2.1/gallon in December 2024.
- 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. Moreover, **OPEC+** members, which pumps about half the world's oil, had agreed voluntary **output cuts** of 2.2 million barrels/day to support the market since November 2023. While these cuts were expected to be gradually phased out on a monthly basis from December 2024, the members recently agreed to **push back** the start of oil **output rises** until **April 2025** and extended the full unwinding of cuts by a year until the **end of 2026** due to weak demand and booming production outside the group.

GDP in the European Union

Constant prices and exchange rate, euro



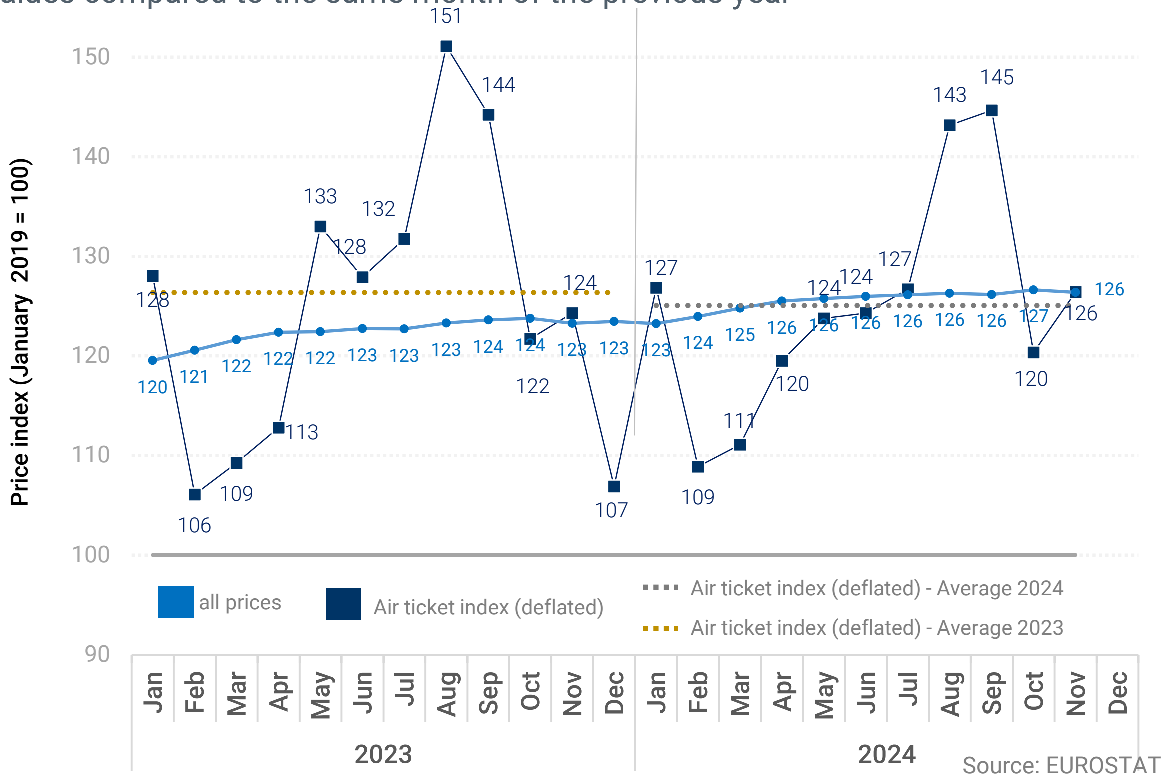
Source: Oxford Economics Ltd.
Last Update: Jan. 2025

The latest information from Oxford Economics shows that:

- In 2024, the **EU27 economies** posted **positive** but **weak growth** across the year. The zone's economy expanded by **0.4%** quarter on quarter in **Q3**, a two-year high, supported by some **one-off factors**, such as the Olympics in France. As expected, GDP growth in Q4 2024 slowed down and posted a 0.2% quarter on quarter.
- **Average** GDP for **2024** is likely to average just **below 0.9%** (vs 2023).
- The **EU27** GDP **growth** forecast is for **1.35% in 2025** (vs 2024). GDP growth is expected to gradually gain pace over the course of this year and expand by **1.7% in 2026** (vs 2025). **Risks** for the **eurozone** are on the **downside** due to domestic and international factors.
- In particular, **risks** include **worsening labour market conditions** which could encourage consumers to **limit spending**. Also, with Trump's second term as US president, **international trade** could be affected by **potential higher US tariffs** from 2026 onwards. . There is a risk that companies' confidence might be negatively affected earlier

Price change per month (EU27)

Values compared to the same month of the previous year



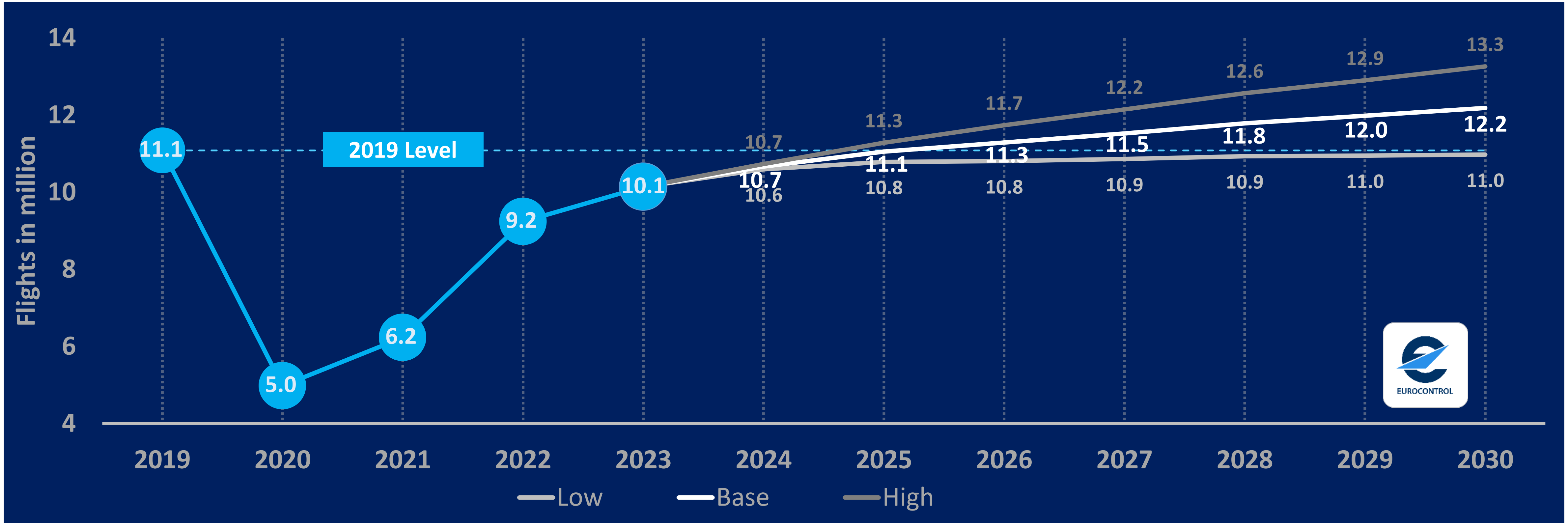
Source: EUROSTAT

The latest information from EUROSTAT for the EU27 shows that:

- **Overall, all-prices** inflation in **2024** was **2.2% higher than** in **2023**.
- **Air ticket prices** were **slightly lower (-1%), in real terms** for Jan-Nov 2024 compared to the same period in 2023.
- The typical seasonal increase in prices at the beginning of the Summer period was more controlled this year: limited air fares variation over the period May to July compared to August and September hikes. As a consequence, 2024 Summer air ticket prices were on average lower than in Summer 2023.
- That being said, **air ticket prices (excluding inflation)** remain **11% higher** than pre-pandemic (**2019**).

EUROCONTROL 7-Year Forecast Update for Europe* 2024-2030 (Autumn 2024)

Actual and future IFR movements



- Europe is forecasted to achieve a flight growth rate of 3.7% in 2025 (base scenario, ±1.7pp) and to finally surpass 2019 levels at ECAC level.
- This reflects the 2024 outturn, an improved economic outlook and optimistic airline schedules for winter 2024-2025.
- On a monthly basis, we project that the ECAC States will overall attain 2019 traffic levels in terms of flights during Summer 2025, despite notable local variation.

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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 Data App: Available at Android Play and Apple Store.
   This app provides daily performance data on Day+1 at network level and top stakeholders.

   Google Play　Apple Store

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

4. Rolling Seasonal Plan:
   www.eurocontrol.int/publication/european-network-operations-plan-2025-rolling-seasonal-plan
   This Rolling Seasonal Plan covers a rolling eight-week period. It plays a major role in helping European aviation by providing key actors with the global view they need to plan effectively.

For more information please contact aviation.intelligence@eurocontrol.int