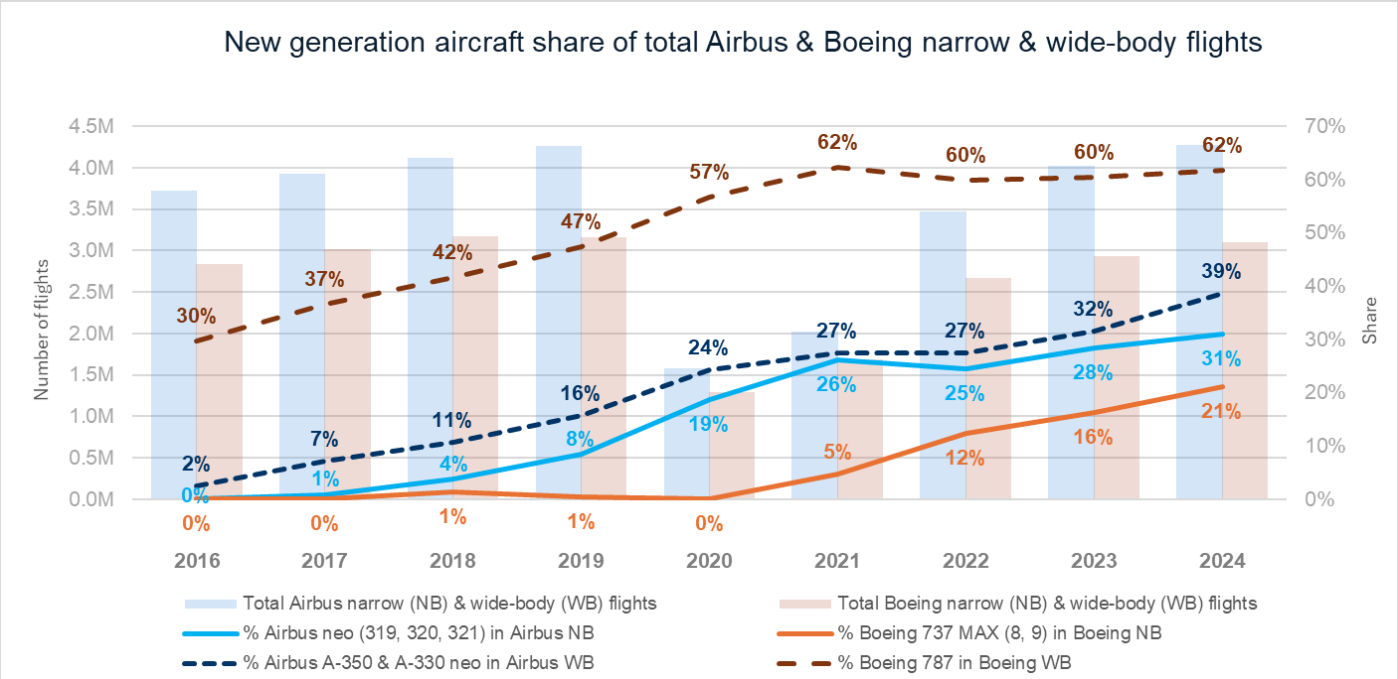
EUROCONTROL Data Snapshot 53

Charting the growth in market share of a new generation of narrow and wide-bodies

23 July 2025



This Data Snapshot updates our March 2024 Data Snapshot in which we analysed the growing use of new generation Airbus and Boeing narrow-body aircraft across the European aviation network, adding 2024 data and expanding the analysis to include wide-bodies.

Continuing their ascending path, the **Airbus neo** family made up **31**% of the total Airbus narrow-body flights in 2024. This growth is being driven by A320neos and A321neos which are slowly replacing older generation variants. Nevertheless, issues with Pratt & Whitney engines have led to several aircraft groundings (about 40 reportedly from Wizz Air, but also from other operators such as Lufthansa, Turkish Airlines or Vueling).

The **Boeing 737 MAX** family also ended 2024 on an ascending path with **21**% of the share of Boeing narrow-body flights, continuing the strong growth since the end of its grounding in December 2020. The 737 MAX 8, the most used variant, is driving this growth, and coincides with a decrease in the share of the 737-800, one of the most widely used commercial aircraft in the world.

In the wide-body segment, the Airbus A350 and A330neo account together for **39%** of Airbus's total wide-body market share. The **A350** is Airbus's flagship wide-body aircraft, steadily gaining market share since entering service in 2015 to reach **28%** of the total Airbus wide-body flights in 2024. It is also the main contributor to the overall increase in Airbus's share of all wide-body flights – from 48% in 2023 to 50% in 2024. In turn, the **A330neo** reached a share of **10%** in 2024, showing constant growth from 1% in 2018. Together, they have almost entirely replaced the A340, and are gradually taking market share from the A330 as well.

For now, Boeing has just one new generation wide-body, the **Boeing 787 Dreamliner**, which has since 2009 steadily taken a dominant role and by 2024 accounted for **62%** of total Boeing wide-body flights, back to its historical 2021 peak. Alongside the older 767/777 families, the 787 will continue to be the backbone of Boeing's wide-body fleet until the arrival of the long-awaited 777X – now planned for 2026, after multiple setbacks.

Except for the 737 MAX, the share of flights operated by new generation aircraft surged during the pandemic as, given massively reduced traffic, operators preferred them over older, less efficient aircraft. The dip in the share of some new generation aircraft in 2022 is largely down to a mix of post-pandemic demand recovery coupled with delays in aircraft deliveries.

Technical bits: The data include all flights in the EUROCONTROL area. The chart shows the share of flights operated by new generation aircraft as a percentage of the total number of narrow-body and wide-body flights for each manufacturer (Airbus and Boeing).

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