

- European flight growth continued to slow down and went up by just 1.0% in May to stand at the low end of the forecast. Preliminary data for June show an increase of 1.3% in flights on June 2018.
- IATA anticipates European airlines to post profit for 2019 of €7.2 billion down from €8.3 billion in 2018. Globally, airlines will record their lowest profits since 2014 owing to rising fuel costs and a weakening of world trade.
- EU carbon prices were stable at €25 per tonne on average in June. For the first half of 2019 they averaged €24 per tonne compared with €12 for the same period in 2018.
- Airline ticket prices decreased by 0.6% in May 2019.
- Oil prices fell sharply and averaged €55 per barrel in June from €63 in May. For the first half of 2019 oil prices were €58 per barrel on average, unchanged from a year-ago period.

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### FLIGHTS MAY 2019

**+1.0%**



ECAC

### EU CARBON PRICES JUNE 2019

**€25**

= MAY 2019



### TICKET PRICES MAY 2019

**-0.6%**

↓ FROM +8.2%  
IN APRIL 2019



EU28

### OIL PRICES JUNE 2019

**€55**

↓ FROM €63  
IN MAY 2019



EUROPE

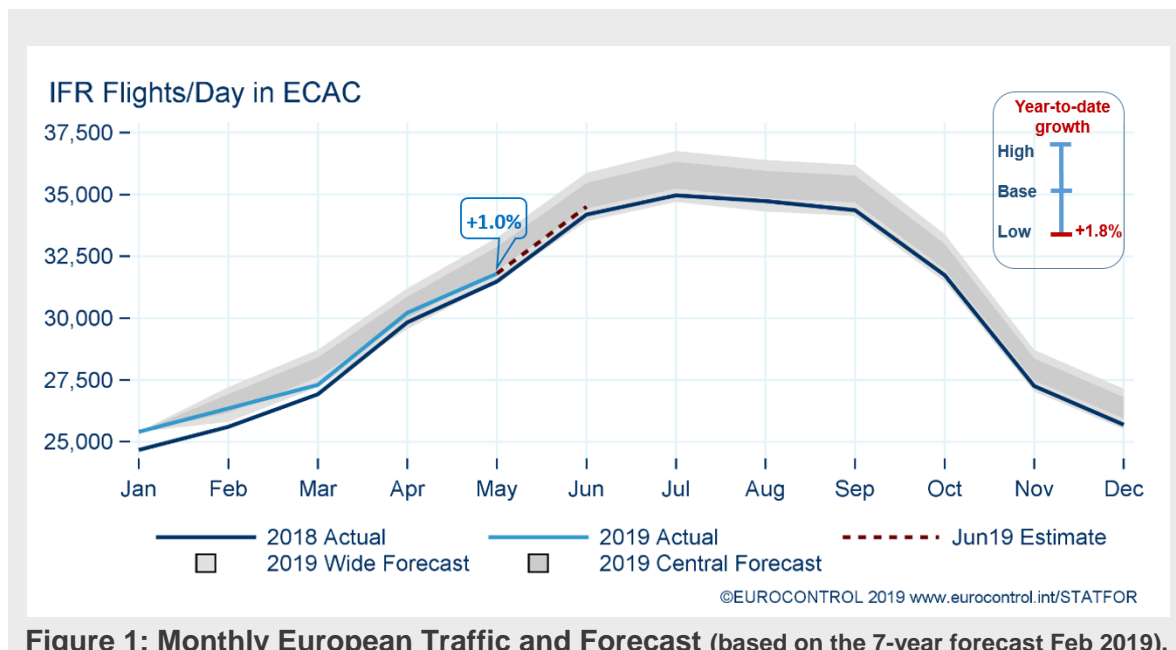


Figure 1: Monthly European Traffic and Forecast (based on the 7-year forecast Feb 2019).

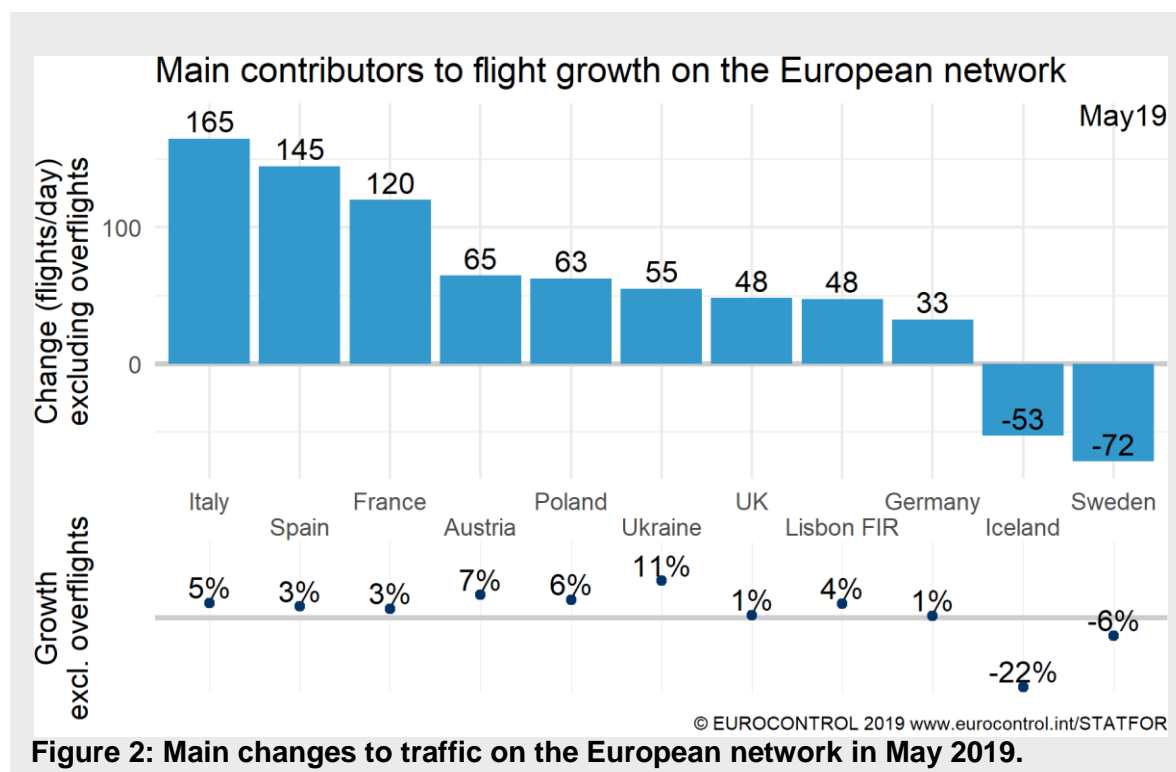
## EUROCONTROL Statistics and Forecasts

European flight growth (ECAC – European Civil Aviation Conference area) continued to slow down and increased by just 1.0% in May to stand at the low end of the forecast published in February 2019. The year to date growth of 1.8% remains near the low end of the forecast range. Preliminary data for June show an increase of 1.3% in flights on June 2018 (Figure 1) (EUROCONTROL/STATFOR).

### Main contributors to flight growth in Europe in May 2019

Six states added more than 50 flights per day to the European local traffic growth (excluding overflights). Italy was the top contributor with 160 additional flights per day owing to a strong growth of the flow to and from Western Europe which added 116 daily flights (the flow to and from Germany alone generated 44 extra daily flights). Also, the flow to and from North Atlantic which grew 18% and the flow to and from the Russian Federation which was up 14%. Spain (excl. Canary Islands) ranked second with 145 additional flights per day owing to its flow to and from UK (+29 flights/day) and to and from Austria (+22 flights/day) along with its internal flow (+17 flights/day). France (bouncing back from industrial action in May 2018) was the third contributor with 120 extra daily flights. Austria was next with 65 extra daily flights thanks to strong growth to and from Southern Europe (Spain +22 flights/day, Italy +10 flights/day and France +8 flights/day). Poland was the fifth contributor and added 63 flights per day owing to its flow to and from Ukraine (+13 flights/day) and to and from Turkey (+10 flights/day). Ukraine was the sixth contributor and saw an increase of 11.5% (+55 flights/day) in its local traffic owing to its flow to and from Egypt (+19 flights/day) and to and from Poland (+13 flights/day).

At the other end of the scale, Sweden saw 72 fewer flights per day, a decrease in domestic air passengers shifting to rail continued to impact the state's internal flow which went down 10.3% (-44 flights/day). Iceland recorded 53 fewer flights per day owing to its flow to and from the United States which fell 40% (-21 flights/day) but also to its flows to and from Western Europe which saw 26 fewer flights/day partly due to the failure of WOW Air in March 2019 (Figure 2) (EUROCONTROL/STATFOR).



**Figure 2: Main changes to traffic on the European network in May 2019.**

## Flight growth by market segment in May 2019

The **charter** segment had the fastest growth and was up 3.4%, followed by the **traditional scheduled** segment which increased by 2.9%. The **low-cost** segment was down 0.2%, a significant decrease that can be partly explained by the economic downturn in Turkey where major Turkish low-cost carriers' domestic flights fell by 22.8%. The **all-cargo** and **business aviation** segments continued to decline and were down 5.8% and 3.9%, respectively. (EUROCONTROL/STATFOR).

## Outside Europe (ECAC) contributors to flight growth in May 2019

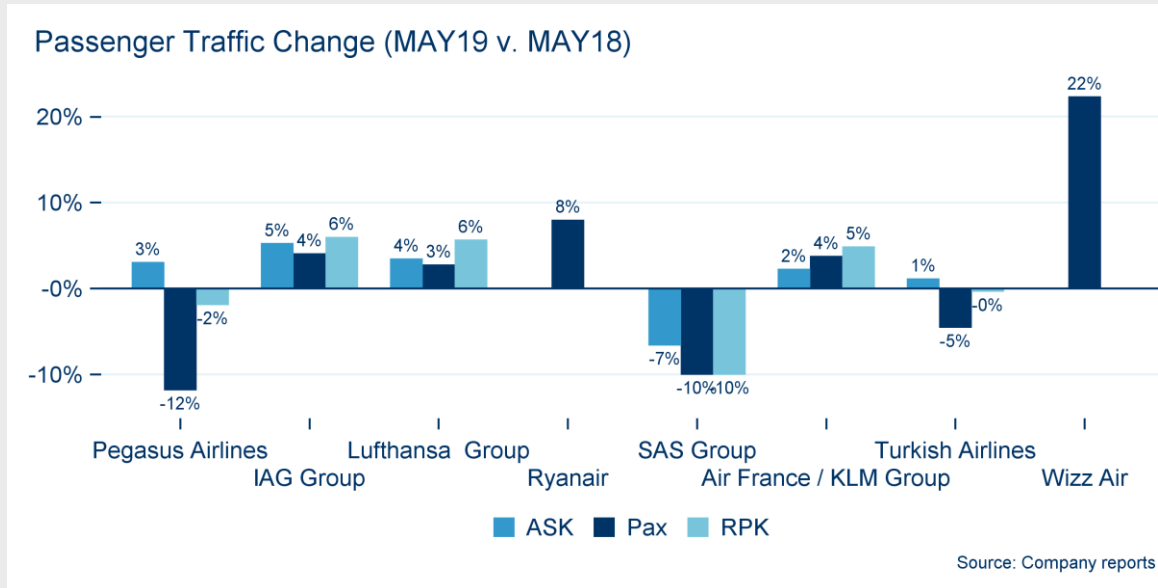
The **top five external partners** in average daily flights on flows in both directions were the **United States** (1,140 flights, up 1.5%), the **Russian Federation** (1,066 flights, up 3.1%), **Egypt** (280 flights, up 18.4%), the **United Arab Emirates** (262 flights, down 14.4%) and **China** (204 flights, up 10.7%) (EUROCONTROL/STATFOR).

## Top aircraft operators in May 2019

The **aircraft operators** which added the most flights to the network on a daily basis were **Ryanair** (+148 flights), **Lufthansa** (+66 flights), **Jet2.com** (+44 flights), **Wizz Air** (+43 flights) and **LOT** (+32 flights) (EUROCONTROL/STATFOR).

## All-causes airline delays in May 2019

Based on data from airlines for delays from all causes, **the average delay per flight on departure was 12.0 minutes in May 2019**, this was a decrease of 3.4 minutes per flight when compared with May 2018 where the average delay per flight was 15.4 minutes. Analysis of the delay causes shows that reactionary delay contributed 4.7 minutes to the average delay per flight in May 2019. As regards arrivals the average delay per flight on arrival was 11.6 minutes, a decrease of 3.1 minutes per flight. Arrival punctuality also improved with 78.3% of flights arriving within the 15-minute threshold before or after the scheduled arrival time (STA) (EUROCONTROL/CODA).



**Figure 3: Main carriers' traffic statistics.**

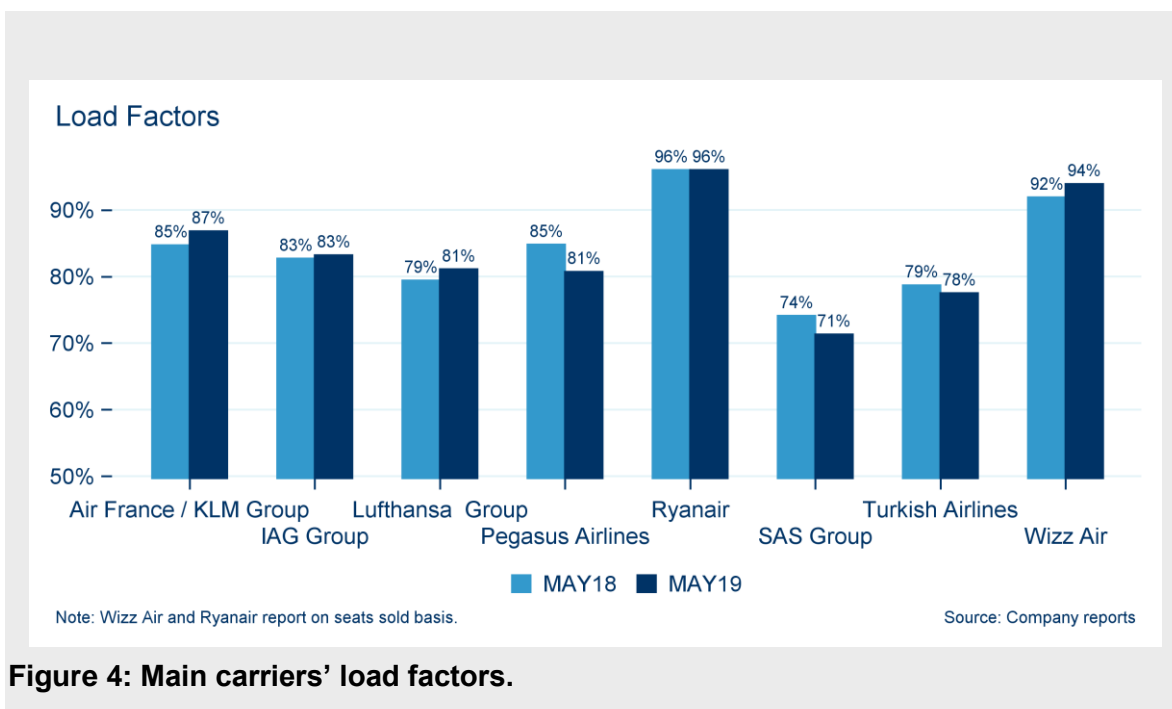
## Other Statistics and Forecasts

**IATA** reported that European scheduled passenger traffic (RPK) increased by 8.0% in April 2019 (vs. April 2018), partly due to the shift of Easter and were up from 4.9% in March. Capacity rose by 6.6% whereas the total passenger load factor was 85.7% compared with 84.6% in April 2018 (IATA, 29 May).

**ACI Europe** reported overall passenger counts at European airports to be up 4.6% in April 2019 (vs. April 2018) whereas overall aircraft movements increased by 2.1%. Freight traffic declined by 6.2%, the sharpest decrease since January 2012 (ACI Europe, 19 June).

**IATA** anticipates European airlines will post profit for 2019 of €7.2 (\$8.1) billion down from €8.3 (\$9.4) billion in 2018. Globally, airlines will record their lowest profits since 2014 owing to rising fuel costs and a weakening of world trade. Profits are forecast to reach €24.8 (\$28) billion compared with €31.4 (\$35.5) billion in its December 2018 forecast. Despite fuel prices which are expected to be 27.5% higher than in 2017, the airline industry should nevertheless record its 10th consecutive year of profits since the financial crisis. The demand for global air travel is expected to slow down and grow by 5.0% (down from 7.4% in 2018) (IATA, 2 June).

**FAA** released its forecast for 2019-2039 and predicts that total operations (landings and take-offs) handled at air traffic control towers will increase from 51.8 million in 2018 to 62 million in 2039. The average annual growth rate for the 21-year forecast period is 0.9% (FAA, 8 May).



## Passenger airlines

### Traffic Statistics for May

Figure 3 and Figure 4 compare May 2019 figures with May 2018 figures for the main European carriers (with the exception of easyJet which now only reports passenger statistics within its quarterly reports). In addition to the number of passengers (PAX), passenger capacity is measured in available seat kilometers (ASK), traffic is measured in revenue passenger kilometers (RPK) and load factor as a percentage (%).

### Capacity, routes, alliances, cost, jobs

Ryanair has bought start-up airline, Malta Air which will start operations with 6 Maltese-registered Boeing B737 aircraft and increase the number to 10 within three years. The new subsidiary will fly 60 to destinations across Europe and North Africa from Malta. Ryanair will brand its Malta-based aircraft fleet in Malta Air livery for summer 2020 (Ryanair, 11 June).

Volotea opened a new base at Cagliari (Sardinia), its 13th base and the fifth in Italy. It will base two Airbus A319 aircraft and operate 15 routes of which five new ones to Palermo, Pescara, Marseille, Strasbourg and Prague (Volotea, 30 May).

Germania Flug, Switzerland was rebranded as Chair Airlines and operates a fleet of three Airbus A319 aircraft from Zurich to 13 leisure destinations in Europe and the Middle-East. Germania Flug was not affected by the bankruptcy of Germania, Germany last February (Chair, June).

SAS will operate its first Airbus A350 aircraft from Copenhagen to Chicago, Beijing, New York, Tokyo, Shanghai, Hong Kong and San Francisco throughout 2020. The airline has 8 A350 aircraft on order with the first unit to be delivered by the end of 2019 to start operations on 28 January 2020 (SAS, 13 June).

IAG has signed a letter of intent with Boeing for 200 B737 MAX aircraft to be delivered between 2023 and 2027. The aircraft will be used by IAG's airlines including Vueling, LEVEL and British Airways (IAG, 18 June).



Rank	Departure Airport	Arrival Airport	Average Daily Flights in May 2019	Growth on May 2018
1	Tenerife Norte	Las Palmas	57	2.2%
2	Madrid	Barcelona	51	2.1%
3	Oslo	Trondheim	51	2.4%
4	Berlin Tegel	Munich	51	20.1%
5	Istanbul Sabiha Gökçen	Antalya	48	-2.3%
6	Toulouse	Paris Orly	47	-0.9%
7	Istanbul Sabiha Gökçen	Izmir	47	-0.5%
8	Oslo	Bergen	46	-5.1%
9	Barcelona	Palma de Mallorca	46	-3.1%
10	Berlin Tegel	Frankfurt	46	-1.8%

source: EUROCONTROL/STATFOR

**Figure 5: Busiest airport pairs in May 2019 (bi-directional flights).**

**Wizz Air**, as part of the Indigo Partners (USA) deal, signed a memorandum of understanding for the purchase of 20 Airbus A321XLR aircraft to be delivered from 2023 onwards. To date, Wizz Air has 276 Airbus aircraft on order for deliveries through 2026 (Wizz Air, 19 June).

**Wizz Air** has added a 6th Airbus A321 aircraft to its Vienna base and will launch 6 new routes to Alicante, Bremen, Chisinau, Naples, Oslo and Porto from December onwards, bringing to 38 the number of routes served from Vienna (Wizz Air, 4 June).

**Azerbaijan Airlines** has reportedly postponed the delivery of 10 Boeing B737 MAX 8 aircraft until 2024 whereas the first unit was initially scheduled for delivery by the end of 2019 (Azernews, 3 June).

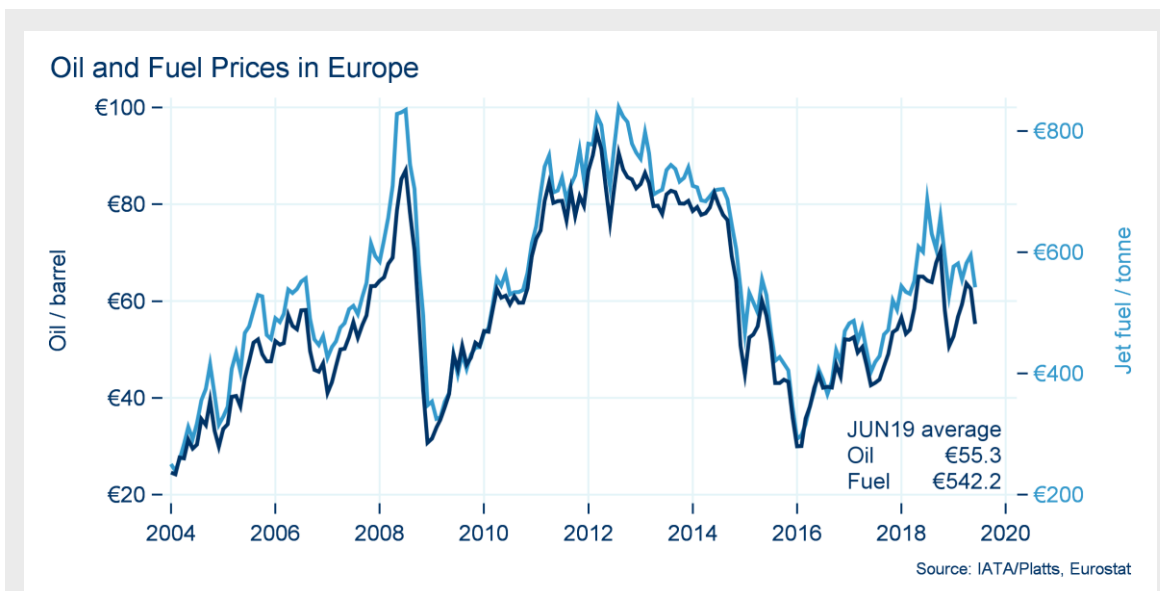
**Lufthansa** has announced a turnaround plan for its low-cost subsidiary **Eurowings** in an attempt to reduce costs by 15% by 2022 and make it competitive again. Eurowings posted a deeper loss for 1Q2019 due to higher fuel costs. The carrier will focus on short-haul, point-to-point operations and will be standardised with a fleet of Airbus A320 aircraft. The integration of **Brussels Airlines** into Eurowings will be abandoned (Lufthansa, 24 June).

**TAP** has launched three new transatlantic routes to Chicago, San Francisco and Washington this summer and reportedly announced it will order the new Airbus A321XLR aircraft. The airline already flies two Airbus A321LR aircraft and has 12 more on order with the possibility to convert some of them to the XLR variant (TAP, 18 June and ATW, 26 June).

The Russian Federation has reportedly imposed a temporary **ban on passenger flights between Russia and Georgia** on the ground of political unrest between the two countries. The suspension is effective from 8 July and concerns 9 airlines and 17 routes operated between Russia and Georgia (The Moscow Times, 21 June).

## Failures

**Joon** completed its last flight on 26 June and was incorporated into its parent company, **Air France**. The millennial-focused airline started operations in December 2017 to take over Air France non profitable routes and at the same time reduce costs and be competitive on the low-cost segment. In 2018 it operated a fleet of 18 Airbus A320 and 340 family aircraft serving 18 destinations in Europe, South America and Africa. 10 Airbus A350-900 aircraft were scheduled for delivery by 2020 (Air France, June).



**Figure 6: Oil and jet fuel prices.**

## Oil

**Oil prices** fell sharply and averaged €55 per barrel in June from €63 in May. For the first half of 2019 oil prices were €58 per barrel, unchanged from a year-ago period. Converted indices for oil and jet fuel prices are shown in [Figure 6](#).

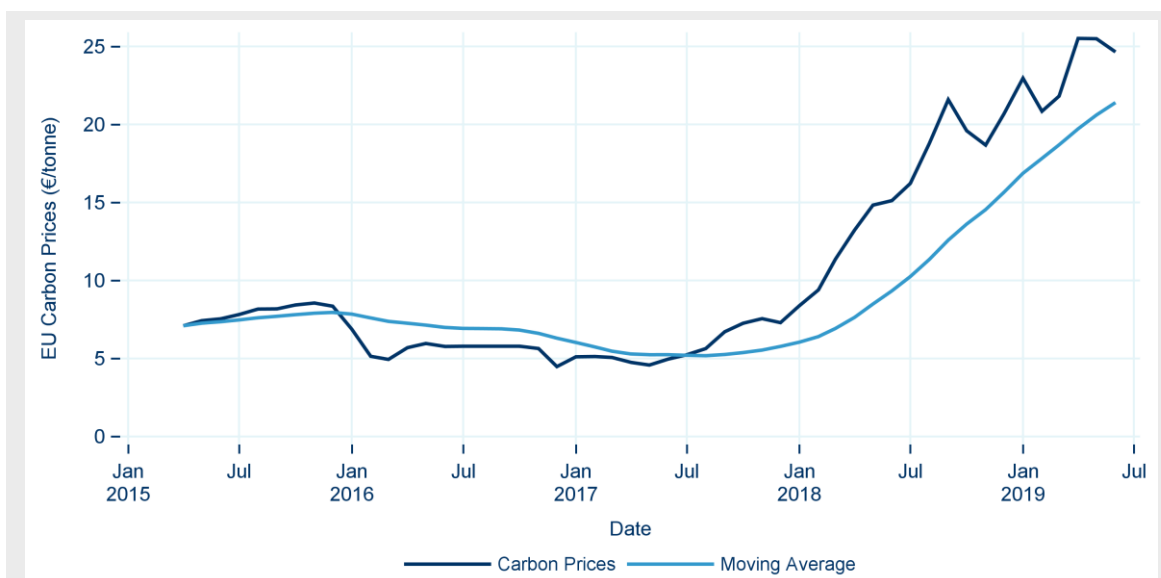
**EIA** forecasts Brent crude prices to average €59 (\$67) per barrel in 2019 which is €2.6 (\$3) per barrel lower than last month's forecast, and will remain at €59 (\$67) per barrel in 2020. EIA lowered oil prices for 2019 following rising uncertainty about global oil demand growth (EIA, 11 June).

**IATA** forecasts the global airline industry's fuel bill to be €180 (\$206) billion in 2019 from €158 (\$180) billion in 2018 and will account for 25% of operating expenses (vs. 23.5% in 2018). The forecast is based on Brent crude oil averaging €61 (\$70) per barrel in 2019 (vs. €63 (\$72) in 2018) (IATA, June).

## Environment

**EU carbon prices** (European CO<sub>2</sub> Emissions Allowances) averaged €24.6/tonne in June 2019 compared with €15.1/tonne in June 2018 and were five times higher than in June 2017 (€5.0 per tonne). This remained above the trend (12-month trailing average) shown in [Figure 7](#) (Insider Inc., June).

Airports Council International (ACI) Europe announced that 194 European airports have signed a resolution of "[NetZeroCarbon2050](#)" whereby they commit to cut CO<sub>2</sub> emissions to zero by 2050 at the latest. To date 43 European airports are already carbon neutral, however when excluding offsets, the number of net-zero airports is three (small airports in Sweden). The resolution does not include aircraft emissions but those of the airport's buildings, infrastructure and vehicles.



**Figure 7: EU carbon prices (European CO<sub>2</sub> Emissions Allowances).**

## Airports

Figure 5 shows the **busiest airport pairs in May 2019** with 60% of them declining compared with May last year. The significant increase of the Berlin Tegel-Munich pair was due to the low-cost segment which was up 46% compared with May 2018.

**Passenger traffic** and **commercial aircraft movements at the top five European airports** (based on the number of flights) in May 2019 (growth on May 2018) were as follows:

Rank	Airport	Passenger traffic	Aircraft movements
1	Frankfurt	6.2 million (+ 1.4%)	46.2K (+ 1.0%)
2	Amsterdam	6.4 million (+ 0.6%)	44.7K (- 0.1%)
3	Paris CDG	6.5 million (+ 6.2%)	43.4K (+ 5.4%)
4	London Heathrow	6.8 million (+ 1.4%)	41.6K (+ 1.1%)
5	Munich	4.3 million (+ 5.4%)	36.9K (+ 5.0%)

Source: airport reports, June 2019

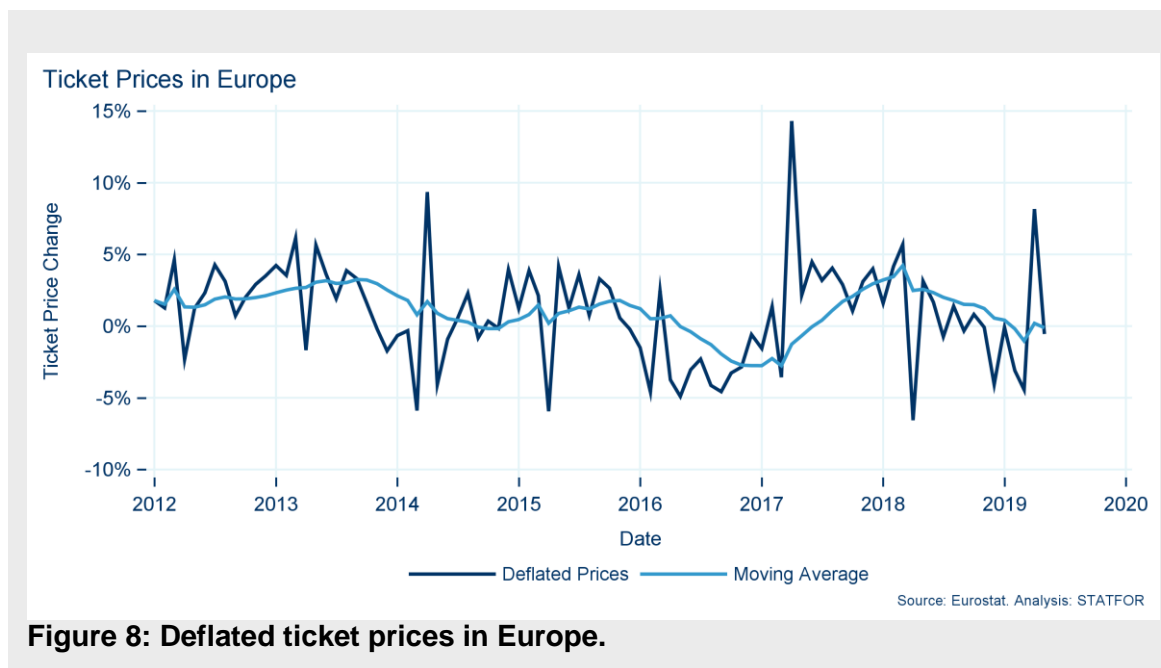
**The five European airports adding the most flights** (departures + arrivals) during the January-May 2019 period (vs. year-ago period) were the following:

Rank	Airport Name	Average Daily Movements Jan-May 2019	Change year-ago period
1	Vienna	725	+93 flights/day
2	Berlin Tegel	524	+80 flights/day
3	Paris CDG	1,323	+66 flights/day
4	Dusseldorf	596	+53 flights/day
5	Milan Malpensa	535	+50 flights/day

Source: EUROCONTROL/STATFOR

The increase at **Vienna** was driven by the low-cost segment and newcomers such as Lauda, LEVEL and Wizz Air. **Berlin Tegel** saw a 30% increase in low-cost flights (+62 flights/day) owing mainly to easyJet Europe and Ryanair which started operations at the airport in 2019. The increase at **Paris CDG** was partly due to a bounce back from industrial action in April 2018.





The five European airports removing the most flights (departures + arrivals) during the January-May 2019 period (vs. year-ago period) were the following:

Rank	Airport Name	Average Daily Movements Jan-May 2019	Change year-ago period
1	Ankara	267	-65 flights/day
2	Stockholm Arlanda	635	-34 flights/day
3	Aberdeen	135	-30 flights/day
4	Keflavik	134	-24 flights/day
5	Izmir	193	-23 flights/day

Source: EUROCONTROL/STATFOR

Turkish carriers (namely Turkish Airlines and Pegasus) saw significant decreases in their domestic network which can be partly explained by the economic slowdown in [Turkey](#). A shift from air to rail in [Sweden](#) along with industrial action impacted domestic flights mostly in April and May. The decrease in [Keflavik](#) is partly due to the failure of WOW Air in March.

[Heathrow](#) has unveiled its masterplan for expansion and will construct a third runway by 2026 with the rest of the airport's infrastructure to be completed by 2050. The plan includes new measures to reduce emissions along with plans for noise respite and proposed ban on scheduled night flights. The airport expansion public consultation on the new runway, airport infrastructure and environmental impacts of expansion runs until 13 September (Heathrow, 18 June).

## Fares

[Ticket prices](#) in Europe [decreased by 0.6% in May 2019 \(vs. May 2018\)](#) based on preliminary values. This was just below the trend (12-month trailing average) shown in [Figure 8](#) (Eurostat, 18 June).

Note: to eliminate the influence of inflation on euro figures, the ticket price is deflated with a price index. The STATFOR deflated ticket prices are estimated in 2015 constant euros. A detailed explanation of the mechanism can be found [here](#).

## Aircraft Manufacturing

At [Paris air show](#) 479 aircraft were ordered from [Airbus](#), 107 of which were firm orders (IAG ordered 14 A321XLR aircraft and Virgin Atlantic ordered 14 A330-900 aircraft). [Boeing](#) recorded 247 commitments (IAG signed a letter of intent for 200 B737 MAX family aircraft). [Embraer](#) announced 39 orders of which 20 firm ones whereas [ATR](#) reported 75 aircraft orders of which 37 firm ones. Overall there were 726 orders (562 commitments and 164 firm orders) of which 45% were meant for operations by European airlines.

[Airbus](#) has introduced its new long-range A321XLR aircraft which has a range of 4,700 nm (+15%) compared with the 4,000 nm of the current A321LR variant. The new aircraft is said to burn 30% lower fuel per seat than previous generation aircraft. First deliveries will start in 2023. There were commitments and order conversions for circa 260 A321XLR aircraft at Paris air show (Airbus, June).

[Boeing](#) released its 2019 market outlook which forecasts a demand for 44,040 new aircraft between 2019 and 2038 of which 8,990 (20%) are meant for Europe, for a regional traffic growth in revenue passenger kilometres of 3.6%. Replacements will represent circa half of total aircraft deliveries. In 2038 European airlines fleet will consist of 76% of single-aisle aircraft mostly driven by the rapid growth of low-cost airlines on short-haul routes (Boeing, June).

[Embraer](#) issued its Market Outlook Report 2019 and forecasts a demand for 28,730 new jets (8,230 units for the up to 150-seat segment and 20,500 units for the 150 to 210-seat segment) between 2019 and 2038. Europe represents 19% of the demand. Passenger traffic in Europe is set to grow 3.7% annually over the period (Embraer, June).

[Bombardier](#) is selling its CRJ regional jet business to Mitsubishi Heavy Industries thereby exiting commercial aviation and will focus on business jets and passenger trains. The transaction is expected to close in the first half of 2020, subject to regulatory approvals. Last year Bombardier sold its Q Series turboprop aircraft programme to Longview Aviation Capital and entered into a partnership with Airbus which took over the CSeries aircraft, rebranded as the Airbus A220 aircraft (Bombardier, 25 June).

Cape Air (a US regional airline) will be the launch customer of Alice, an [all-electric aircraft](#) manufactured by [Eviation](#). The aircraft will seat nine passengers flying at 444 km/h with a range of up to 1,046 km when it enters into service in 2022 (Eviation, June).

## Regulation

The [European Aviation Safety Agency \(EASA\)](#) has published a common set of rules to ensure safe, secure and sustainable operations of drones for both commercial and leisure activities. The new rules will enable drone operators to operate seamlessly when traveling across the EU or when developing business involving drones in Europe. The EU regulation will replace existing national rules in EU28 and from June 2020, drone operators will need to register in the Member State where they reside or have their main place of business. EASA has established three categories of operation for drones: “open” (for low-risk drones of up to 25kg), “specific” (drones will require authorization to be flown) or “certified” (highest risk category, delivery or passenger drones) (EASA, 11 June).

A survey commissioned by IATA on the impact of a [EU-wide tax on air tickets](#) concluded that air passengers are in favour of governments encouraging the development of new technologies and sustainable aviation fuels to reduce aviation CO<sub>2</sub> emissions, rather than imposing environmental taxes. Earlier this year, the Netherlands, France and Belgium have proposed EU to end tax exemptions on jet fuel and airline tickets, if no European-wide tax on aviation is agreed, the Netherlands plans to introduce a national flight tax of €7 per departing passenger from 2021 onwards (IATA, 19 June & Government NL, May).

The FAA has taken steps to support the [development of civil supersonic aircraft](#) and has issued a notice of proposed rulemaking to include a procedure to request authorization for supersonic flight-testing in the United States to accommodate future noise certification actions. Current regulations prohibit overland supersonic (above the speed of sound) civil flights (FAA, 28 June).



Supporting European Aviation

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