



EUROCONTROL

EUROPEAN AVIATION OVERVIEW 29 Mar - 04 Apr 2023

Headlines

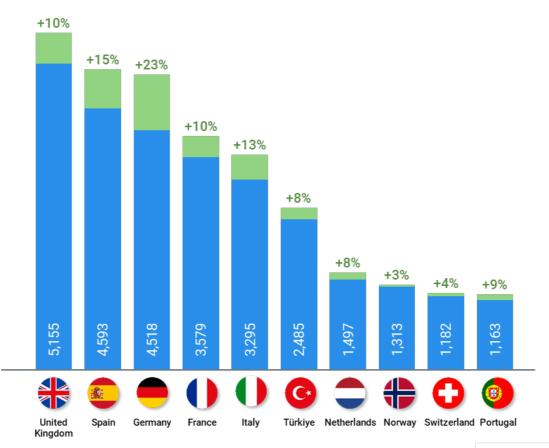
(Week 29 Mar - 04 Apr 2023)

- The Network recorded 26,305 average daily flights (+12% vs 2022), increasing (+10%) vs the previous week and standing at 92% of 2019 levels.
- Summer 2023 scheduling season started on the 26th of March, so the "previous week" in this publication straddles two seasons. In most European States, Easter holidays started on the 1st of April.
- Over the last 2 weeks, network traffic has been affected by industrial action in France (reform of pension law) as well as in Germany, Italy, Spain and Portugal (disruption at airports).
- Overall, France accounted for 75% of all en-route ATFM delays last week and Germany 16%.
- Arrival and Departure punctuality deteriorated compared to the previous publication, mainly due to the en-route ATFM delays.
- Low-cost airlines, driven by Ryanair, have recorded strong growth rates, expanding capacities for Summer season.
- Three airlines recorded flights above 2019 levels: Ryanair (+40%), Wizz Air (55%) and Vueling (15%).
- The Jet fuel price closed at 2.43 USD/gallon on 31 March, slightly increasing (+3%) on 17 March. Current prices have decreased by 15% compared to the ones at the beginning of the year.

Top 10 Busiest States

On week 29 Mar - 04 Apr 2023

(all flights incl. overflights compared with previous week)

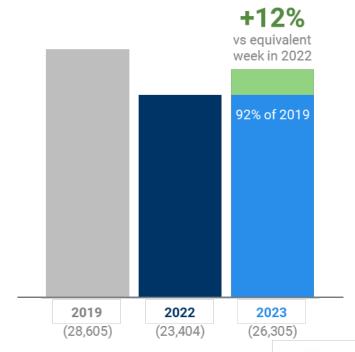




Traffic Situation

Average daily flights (including overflights)

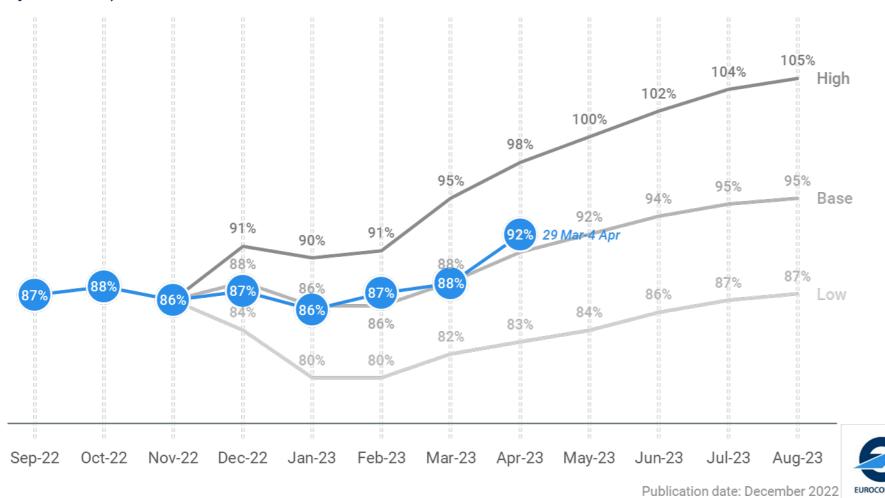
Week 29 Mar - 04 Apr 2023





Overall Situation Compared to the EUROCONTROL Traffic Scenarios

(base year 2019)



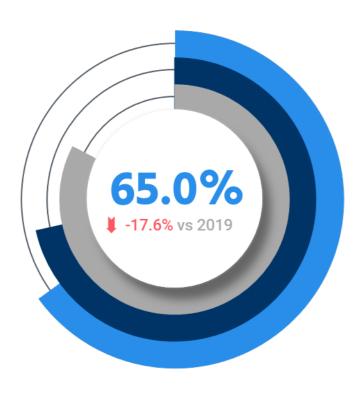
- The latest EUROCONTROL Traffic scenarios were published on 16 December 2022.
- Since that date, network traffic has evolved around the base scenario.
- Flights in March 2023 were at 88% of March 2019 levels.
- An analysis of the schedules in the Network Rolling Seasonal Plan shows that April should also be in line with the base scenario (i.e. 91%).
- On a year-to-date basis, network traffic is at 87% of 2019 and +20% vs 2022.

Arrival & Departure Punctuality

(at top airports for the last week)

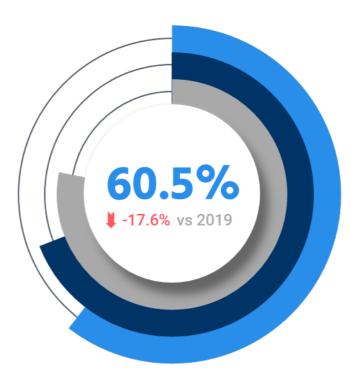
Week 29 Mar - 04 Apr 2023

ARRIVAL PUNCTUALITY



82.6% ______ in 2019 71.5% _____ in 2022

DEPARTURE PUNCTUALITY



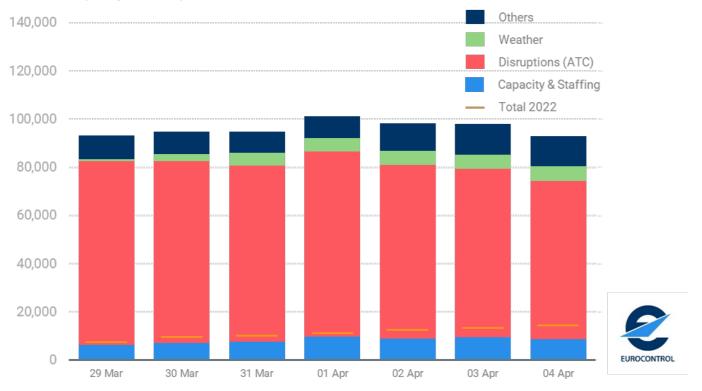
78.1% ______ in 2019 69.1% _____ in 2022

- Both arrival and departure punctuality are 17.6% below 2019 levels over the last week.
- Punctuality is still impacted by a longterm French industrial action which influenced network performance throughout the week due to traffic reduction program for specific airports and ATFM delays.
- Industrialaction had an impact in Italy (2 Apr), in Spain (31 Mar 2 Apr), Portugal (29 Mar 2 Apr) and in Germany (30 Mar 2 Apr).
- Weather impacted several airports throughout the week: high winds affected London-Heathrow, Amsterdam-Schiphol. Low visibility affected London-Heathrow and Mallorca airports. Low cloud ceiling at Amsterdam-Schiphol. Oslo-Gardermoen was affected by snow. Convective weather affected Istanbul-Sabiha Gokcen, London-Heathrow, Zurich and Munich airports.

En-Route ATFM Delays

Delays per cause (EUROCONTROL Area)

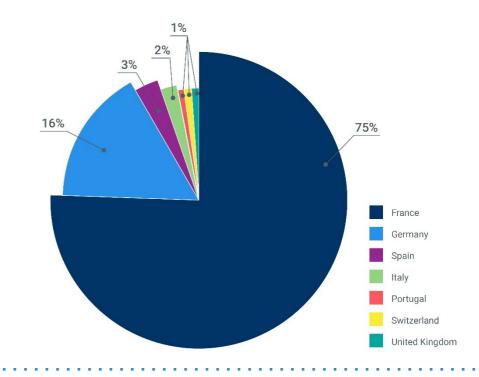
In minutes (7-day average) in 2023



- En-route ATFM delays have been constantly higher than in 2022.
- This is mainly due to industrial action in France caused by a reform of pension law which led to disruption in the network over several days in early 2023 but more severely in March (7th to 12th and 16th to 31st) and early April (1st to 4th).
- Some days were also disrupted due to industrial action in Germany (e.g. 27 March: ground handling strikes in some airports) but also in Italy (2 April) or in Spain.

Share of en-route ATFM delays

Week 29 Mar - 04 Apr 2023



- For these reasons, France accounted for 75% of all en-route ATFM delays over the last week.
- Germany comes second with 13% of all en-route ATFM delays, mainly concentrated in Karlsruhe, Munich and Bremen ACCs.

Top 10 Countries

Dep/Arr compared to the equivalent week in 2019, 2022 and previous week.

Week 29 Mar - 04 Apr 2023

| 2. | % 2019 |
|---|-------------------|
| 3. Germany 4,518 +23% S +12% 4. France 3,579 +10% S +5% 5. Italy 3,295 +13% S +10% 6. Türkiye 2,485 +8% S +22% 7. Netherlands 1,497 +8% S +9% | / -7 % |
| 4. | +11% |
| 5. Italy 3,295 +13% S +10% 6. Türkiye 2,485 +8% S +22% 7. Netherlands 1,497 +8% S +9% | [/] -18% |
| 6. C Türkiye 2,485 +8% 5 +22% 7. Netherlands 1,497 +8% 5 +9% | [/] -13% |
| 7. Netherlands 1,497 +8% S +9% | +3% |
| 7. | +4% |
| 8. Norway 1,313 +3% W -1% | / -8% |
| | / -7 % |
| 9. Switzerland 1,182 +4% S +9% | / -12 % |
| 10. Portugal 1,163 +9% S +8% | +15% |

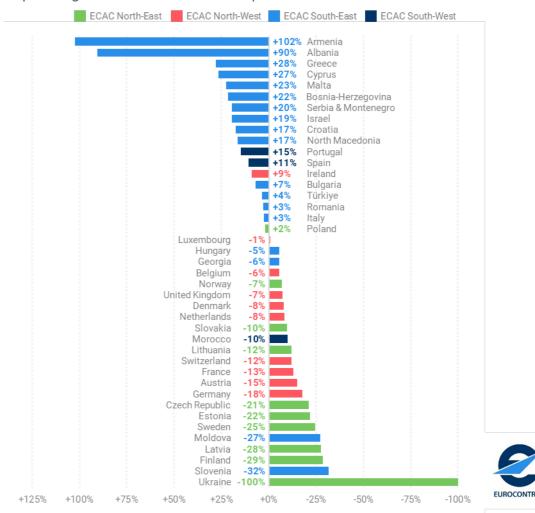


- The top 10 States recorded a growth of around +12% on the previous week, mostly due to the switch to the Summer season. No change in the ranking over the previous week.
- Germany recorded a high growth rate (23%), artificially inflated due to the lower traffic the previous week (strikes). Spain and Italy recorded respectively 15% and 13%, followed by France and UK (10% each).
- Four States have recorded growth above 2019 (Spain, Italy, Türkiye and Portugal). All other States are still between 13% and 7% below 2019 levels, except Germany, lagging behind at -18% owing to weak domestic flows.

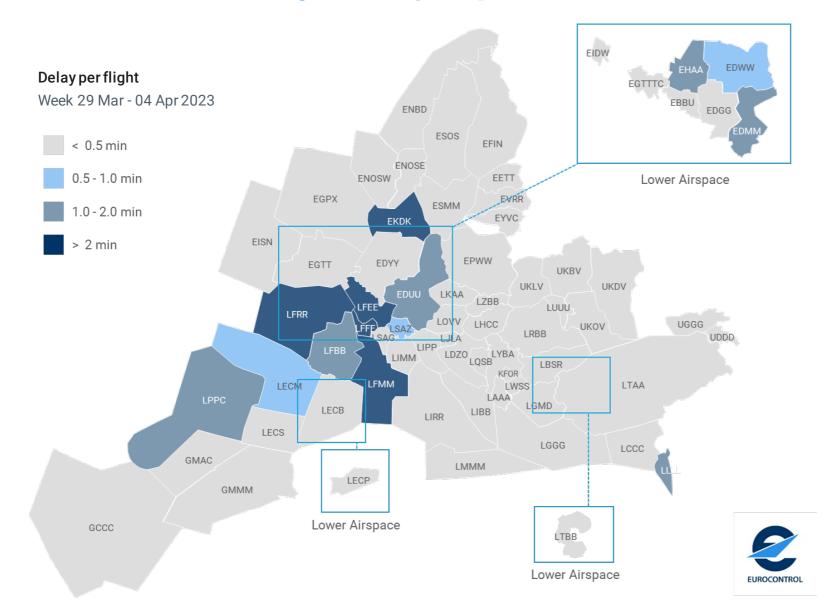
States in the EUROCONTROL Network

Compared to the equivalent week in 2019

Dep/Arr flights for week 29 Mar - 04 Apr 2023



En-Route ATFM delayed flight per Area Control Centre



- Over the last few weeks, en-route ATFM delays have risen significantly and are above 2022 levels.
- The main reason is related to industrial action in a number of States, mainly in France, but also more locally for example in Germany or Spain.
- The most affected ACCs were Marseille (11.5 min/flight), Paris (6.8), Brest (4.9), Copenhagen (2.5), Reims (2), Karlsruhe (1.9), Munich (1.9) and Bordeaux (1.8).
- Overall, France was responsible for 75% of all en-route ATFM delays last week, followed by Germany (16%) and Denmark and Spain (3% each).

Top 10 Aircraft Operators

Week 29 Mar - 04 Apr 2023 (avg daily flights)

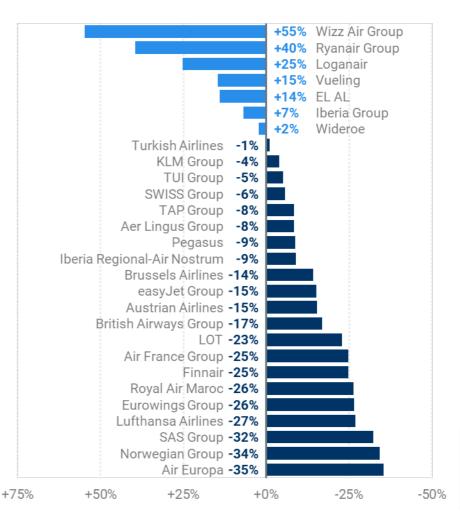
| No. | Aircraft operator | Average daily flights % prev week | | % prev year | | • | % 2019 |
|-----|-----------------------|-----------------------------------|------|-------------|------|---|--------|
| 1. | Ryanair Group | 2,946 | +18% | S | +7% | S | +40% |
| 2. | easyJet Group | 1,386 | +10% | W | -6% | W | -15% |
| 3. | Urkish Airlines | 1,300 | +1% | S | +16% | W | -1% |
| 4. | Lufthansa Airlines | 1,142 | +36% | S | +7% | W | -27% |
| 5. | Air France Group | 903 | +6% | S | +3% | W | -25% |
| 6. | KLM Group | 790 | +9% | S | +15% | W | -4% |
| 7. | Wizz Air Group | 789 | +14% | S | +22% | S | +55% |
| 8. | British Airways Group | 765 | +1% | S | +25% | W | -17% |
| 9. | vulng Vueling | 615 | +19% | S | +18% | S | +15% |
| 10. | SAS Group | 603 | -1% | S | +12% | W | -32% |



- The top 10 Aircraft operators recorded a growth of 12% on the previous week, ranging from -1% (SAS) to +36% (Lufthansa's rate is artificially inflated due to strikes at German airports during the previous week).
- Low-cost airlines posted double-digit growth on previous week (partly due to the change in season): busiest operator is Ryanair (+18%, +460 flights/day), followed by easyJet: +10%, Wizz Air: +14% and Vueling: +19%.
- SAS posted a decline (-1%) vs the previous week, mainly due to a decrease in domestic flows in Norway and Sweden.
- Three airlines within the top 10 surpassed their 2019 flight levels: Vueling (+15%), Ryanair (+40%), Wizz Air (+55%).

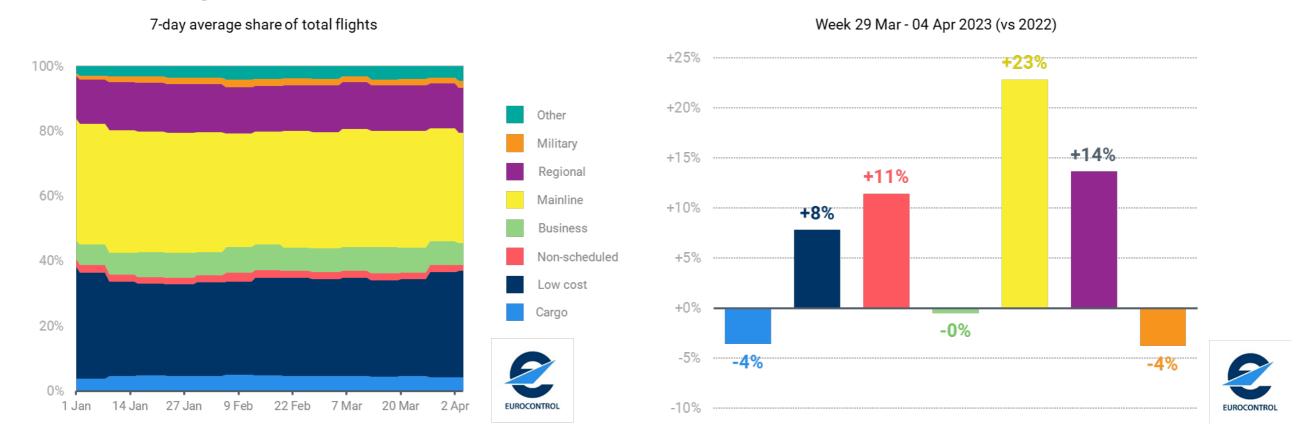
Aircraft Operators in the EUROCONTROL Network

Compared to the equivalent week in 2019
Dep/Arr flights for week 29 Mar - 04 Apr 2023





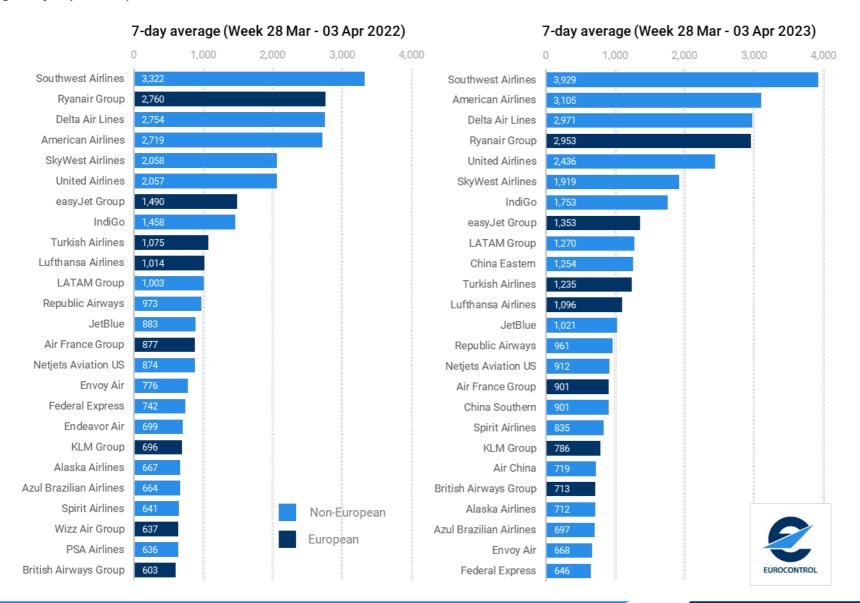
Market Segments in the EUROCONTROL Network



- Compared to 2022, Mainline (+23%) Regional (+14%), Charter (+11%) and Low-Cost (+8%) are recording sustained growth rates compared to last year owing to the continuing recovery and to the relatively low levels of traffic in 2022 (COVID-19 variants impacted growth in flights during the first quarter of 2022).
- Business Aviation (0%) and all-cargo (-4%) are recording fewer flights in 2023 compared to 2022 levels.

Top 25 Global Aircraft Operators

(average daily departures)



Over the last week:

- 7 European airlines are ranked in the Top 25 global aircraft operators (as in 2022).
- The first European aircraft operator (4th) is Ryanair. (up one place compared to two weeks ago).
- The other European airlines in the Top 10 are easyJet (8th), Turkish Airlines (11th) and Lufthansa (12th).
- British Airways is now ranked 22^{nd} in 2023 (vs 25^{th} in 2022).

Top 10 Airports



Airport Ranking

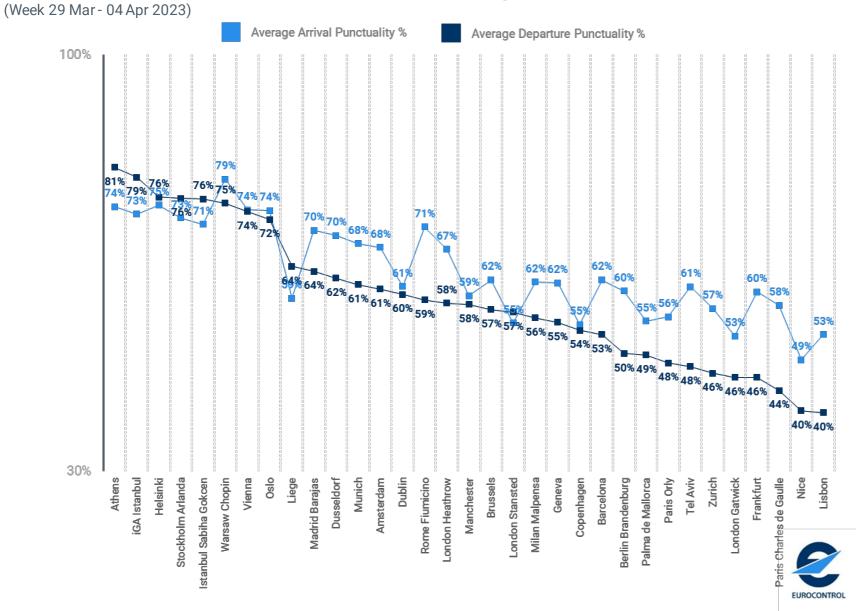
Week 29 Mar - 04 Apr 2023 (vs 2019)

| No. | Airport | Avg. daily dep/arr flights | vs 2022 | vs 2019 |
|-----|-------------------------|----------------------------|---------|---------|
| 1. | iGA Istanbul | 1,265 | S +21% | n/a |
| 2. | Amsterdam | 1,224 | S +9% | W -10% |
| 3. | London Heathrow | 1,212 | S +19% | W -8% |
| 4. | Paris Charles de Gaulle | 1,205 | S +14% | W -9% |
| 5. | Frankfurt | 1,161 | S +16% | W -18% |
| 6. | Madrid Barajas | 1,046 | S +11% | W -7% |
| 7. | Barcelona | 883 | S +15% | W -0% |
| 8. | Munich | 821 | S +10% | W -28% |
| 9. | London Gatwick | 686 | S +14% | W -8% |
| 10. | Rome Fiumicino | 681 | S +21% | W -17% |

- A few changes in the ranking over the previous week: increase for Amsterdam, Frankfurt and Munich, decrease for Amsterdam, London Heathrow, Madrid and Rome.
- All airports experienced a double digit increase (except Amsterdam, +9%); ranging from 10% (Munich) to 21% (iGA Istanbul or Rome Fiumicino).
- Growth rates compared to 2022 are lower than in the previous publication when they were around 20%-30%. This is most likely due to the fact that at the end of March 2022, several states relaxed their COVID-related travel restrictions. The current comparison with 2022 is therefore now more like-for-like.



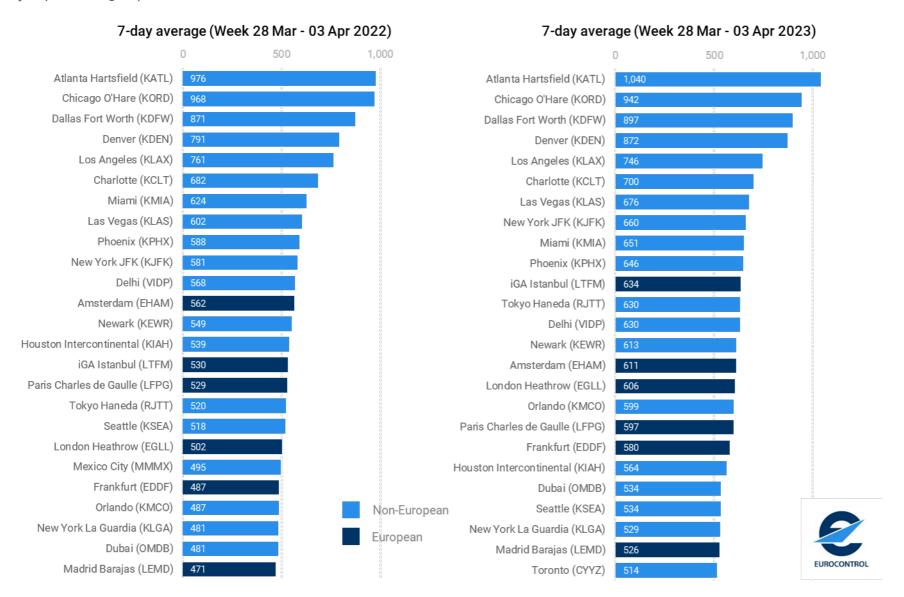
Average Arr/Dep Punctuality at Main Airports



- After having deteriorated in early March because of significant en-route ATFM delays related to industrial action in France, both arrival and departure punctuality are now improving even if they are still worse than in 2022.
- At most airports, arrival punctuality is higher (i.e. better) than departure punctuality.
- Howevera few airports, notably Athens, iGA Istanbul, Helsinki, Stockholm, Istanbul Sabiha-Golcen and Liège, have departure punctuality that is higher than arrival punctuality which indicates that these airports have been able to absorb delays.

Top 25 Global Airport Departures

(average daily departure flights)

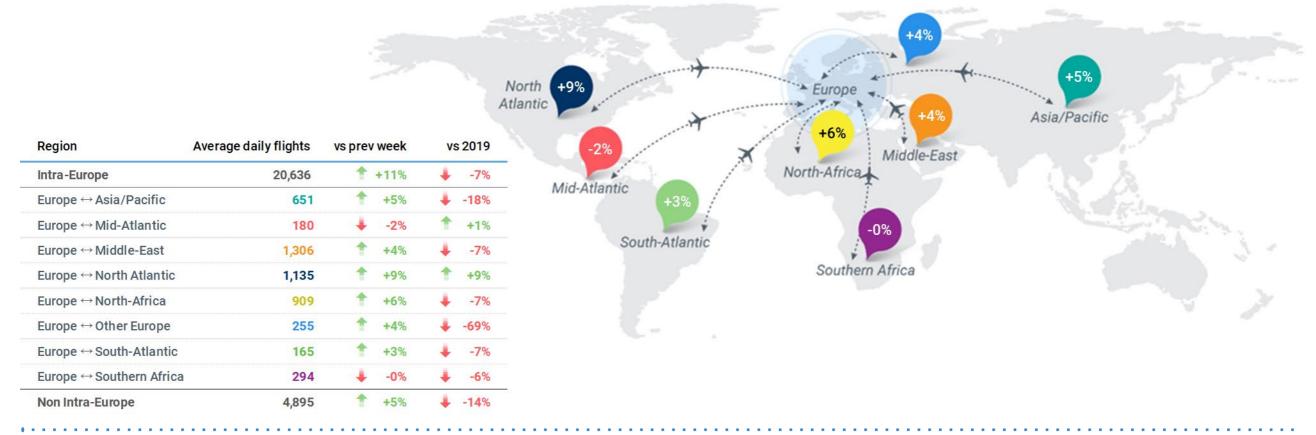


Over the last week:

- Six European airports are ranked in the Top 25 of global aircraft operators (same as in 2022).
- The first European airport (11th) is iGA Istanbul.
- The other European airports in the Top 25 are Amsterdam (15th), London Heathrow (16th), CDG (18th), Frankfurt (19th) and Madrid (24th).

Traffic Flows

(average daily departure/arrival flights for week 29 Mar - 04 Apr 2023)



- The main traffic flow was intra-European with 20,636 daily flights last week, +11% vs the previous week. Inter-Continental flows recorded 4,895 daily flights on average last week, +5% vs the previous week.
- The second regional flow is between Europe and the Middle-East with 1,306 average daily flights last week, showing an increase of +4% vs the previous week.
- The third flow is with North America with 1,135 daily flights, growing by 9% over the previous week.
- Flows with Other Europe (incl. Russian Federation) are still lagging behind and were at -69% compared to 2019.
- Flows between Europe and Asia/Pacific are also still lagging behind, to a lesser extent, at -18% compared to 2019. Compared to last week, this flow is recovering a bit more strongly than in the previous edition (now +5% vs the previous week): the progressive reopening of traffic with China is contributing to improve the recovery rate.

Top 10 Long Haul Country-Pairs

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

Week 29 Mar - 04 Apr 2023

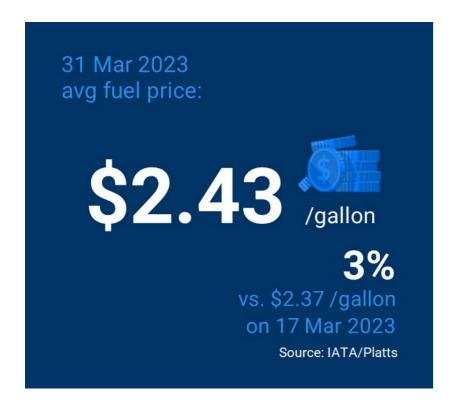
| No. | Country pair | Average daily flights | % prev week | % prev year | % 2019 |
|-----|--|-----------------------|-------------|-------------|--------|
| 1. | UK ↔ US | 295 | +6% | +31% | +4% |
| 2. | Germany ↔ US | 155 | +18% | +12% | +1% |
| 3. | France ↔ US | 103 | +2% | +8% | +4% |
| 4. | $\textbf{Netherlands} \leftrightarrow \textbf{US}$ | 78 | +13% | +19% | +9% |
| 5. | Spain ↔ US | 59 | +6% | +13% | +9% |
| 6. | $UAE \leftrightarrow UK$ | 56 | +1% | +24% | -11% |
| 7. | Italy ↔ US | 56 | +19% | +70% | +25% |
| 8. | $\textbf{Ireland} \leftrightarrow \textbf{US}$ | 54 | +2% | +6% | +10% |
| 9. | Russia ↔ UAE | 42 | -2% | +151% | +950% |
| 10. | India ↔ UK | 40 | -1% | +73% | +20% |



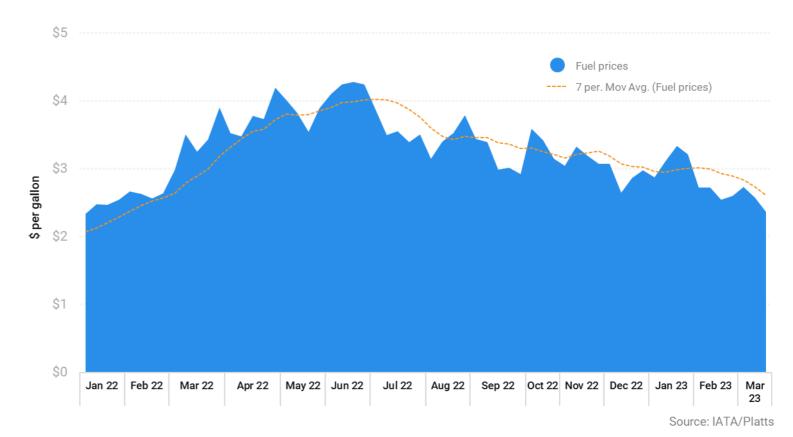
- No change in the ranking over the previous week for the top 10 Long-haul Country-Pairs, except for Italy ↔ US flow which moved one rank up.
- The majority of the flows posted an increase (ranging from 1% to 19%). Two flows posted a decrease: Russia ↔ UAE (-2%) and India ↔ UK(-1%).
- Seven of the top 10 Long Haul Country-Pairs are with the US, the main three being between US and UK, Germany and France.
- The flow between Italy and the US showed the highest increase (+19%), as in the last edition.
- Most of the flows are now above 2019 levels, except UAE ↔ UK.
- To be noted the increase in the number of flights in 2023 on the flow Russia ↔ UAE vs 2022 and 2019.

Economics

Week 29 Mar - 04 Apr 2023



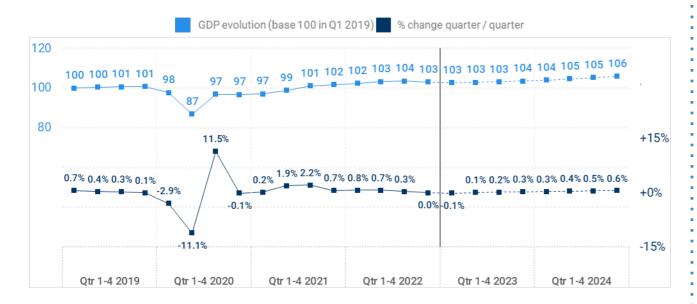
Jet Fuel Price (Europe)



- The average price of jet fuel increased to 2.43 USD/gallon on 31 March, a very small change (+3%) compared to the previous edition (17 Mar 2023).
- This represents a drop of 6% compared to the end of February 2023 and a 15% drop compared to the beginning of 2023.
- Based on a moving average trend, fuel prices in Europe have been declining since June 2022, from \$4/gallon down to \$2.5/gallon in March 2023.

GDP in the European Union

Constant prices and exchange rate, Euro

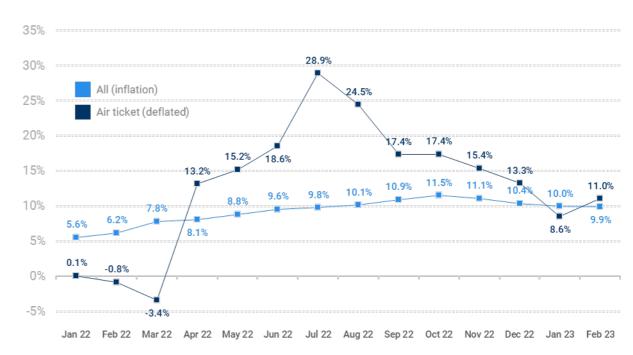


Source: Oxford Economics Ltd.

- According to the latest GDP forecast from Oxford Economics, economies will return to growth in Q2 2023 (vs Q2 2022) and the quarterly rate should climb up to +0.6% in Q4 2024 (vs Q4 2023).
- In terms of index with 2019 as base 100, 2023 should be at 103 and 2024 at 105.

Price Change per Month (EU27)

For year 2022



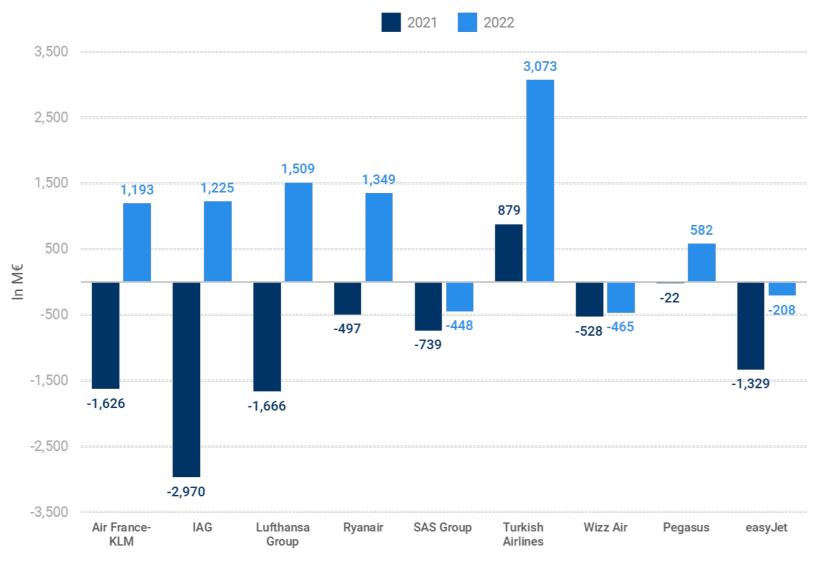
Source: EUROSTAT

The latest information from EUROSTAT shows the following:

- In 2022, prices of air ticket increased by 16% compared to 2021 (peaking at +29% in July 2022).
- In Jan-Feb 2023, ticket prices increased by 10% on average, in line with all-prices inflation.
- This reflects inter alia sustained demand, reduced flight choice, and higher jet fuel prices.

Operating Profits of Airlines

In M€ in 2022 and 2021



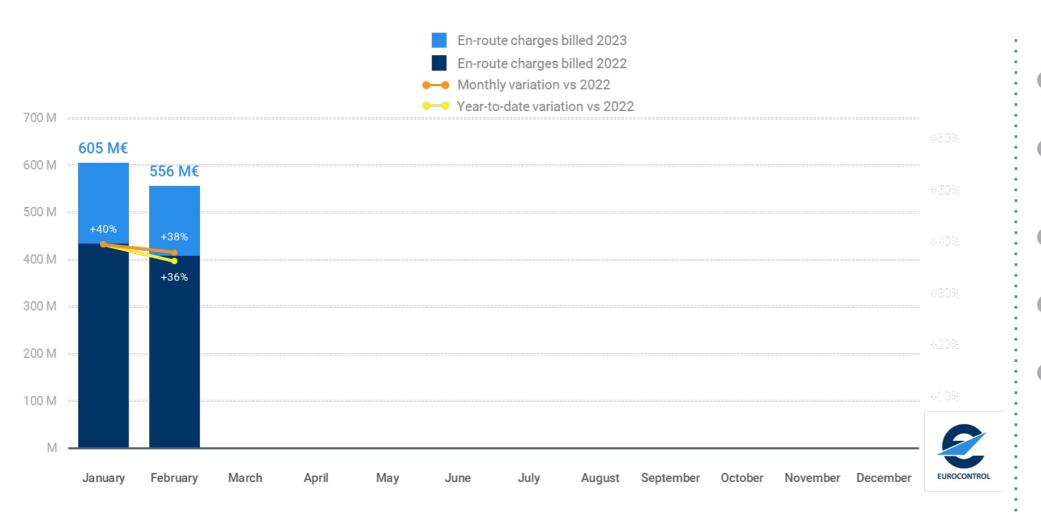
During 2022, and compared to 2021:

- In this top 10, all but 3 aircraft operators posted profits in 2022.
- Turkish Airlines has recorded the highest operating profits for 2022 (+3,1 Bn€).
- Other flag carrier groups (Air France / KLM, IAG and Lufthansa) also posted positive operating profits.
- Ryanair has posted strongly positive results. Pegasus also recorded profits but to a lesser extent.
- Aircraft operators considered in this sample recorded 7.8Bn€ of profits in 2022, after 9.5Bn€ losses in 2021.

Source: Company reports

En-route Air Navigation Charges for the EUROCONTROL Area (2023)

Year-to-date amount billed: 1,162 M€ (+38% vs 2022)



- At network level, 556M€ were billed in February which represents +36% vs 2022 and +11% vs 2019.
- These changes were driven by the evolution of unit rates and of traffic characterized by the distance flown and the weight of each aircraft (or Service Units).
- The variation vs 2019 (+11%) is explained by an increase in Unit Rates of +17% and a decrease in Service Units of -5%.
- The variation vs 2022 (+36%) is explained by an increase in Unit Rates of +7% and an increase in Service Units of +29%.
- On a year-to-date basis, EUROCONTROL has billed 1,162 M€ which is +38% vs 2022.

Supporting European Aviation



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To further assist you in your analysis, EUROCONTROL provides the following additional information on a daily basis (daily updates at 7:30 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.



www.eurocontrol.int/our-data/

This webpage provides an overview of key charts and publications related to European aviation performance.



www.eurocontrol.int/publication/european-network-operations-plan-2023-rolling-seasonal-plan This Rolling Seasonal Plan covers a rolling six-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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For more information please contact aviation.intelligence@eurocontrol.int