



# EUROCONTROL

EUROPEAN AVIATION OVERVIEW 12-18 Apr 2023

#### Headlines

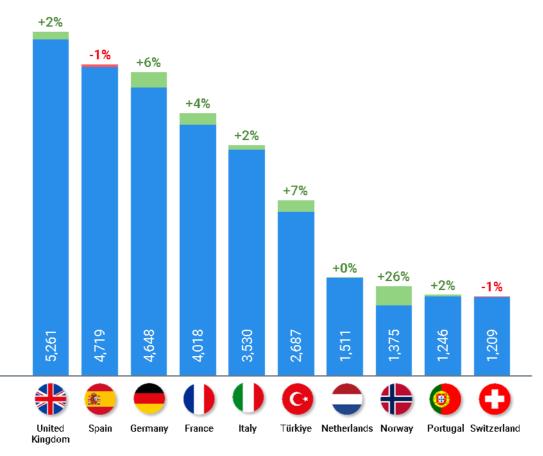
#### (Week 12-18 Apr 2023)

- The Network recorded 27,357 average daily flights (+11% vs 2022), increasing (+4%) vs the previous week and standing at 90% of 2019 levels.
- Low-cost and flag carriers have now deployed their summer capacities (e.g. Ryanair, easyJet, Wizz Air, KLM, Lufthansa). Some operators are now deploying (SAS) or continue to expand (Turkish Airlines).
- Over the last 2 weeks, network traffic has been affected by industrial action in France, already started earlier this year (reform of pension law).
- For this reason, France accounted for 75% of all en-route ATFM delays last week.
- Arrival and Departure punctuality slightly improved compared to the previous publication, mainly due to less en-route ATFM delays, but still around 7 percentage points below 2019.
- EUROCONTROL billed 652M€ of en-route charges for March flights; 28% above the amount billed for the March 2022 flights. On a year-to-date basis, EUROCONTOL billed 1,814M€ in 2023, +34% compared to 2022, owing to both service units (flights) and unit rates increases.
- On 19 April, the EUROCONTROL website came under attack by pro-Russian hackers, resulting in interruptions to the website. There was no impact on European aviation.

## **Top 10 Busiest States**

On week 12-18 Apr 2023

(all flights incl. overflights compared with previous week)

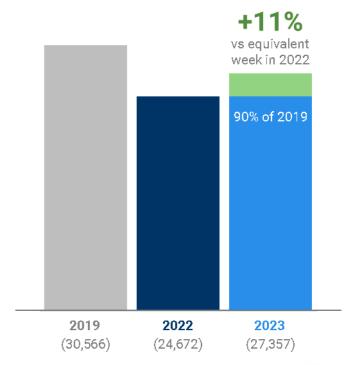




#### **Traffic Situation**

Average daily flights (including overflights)

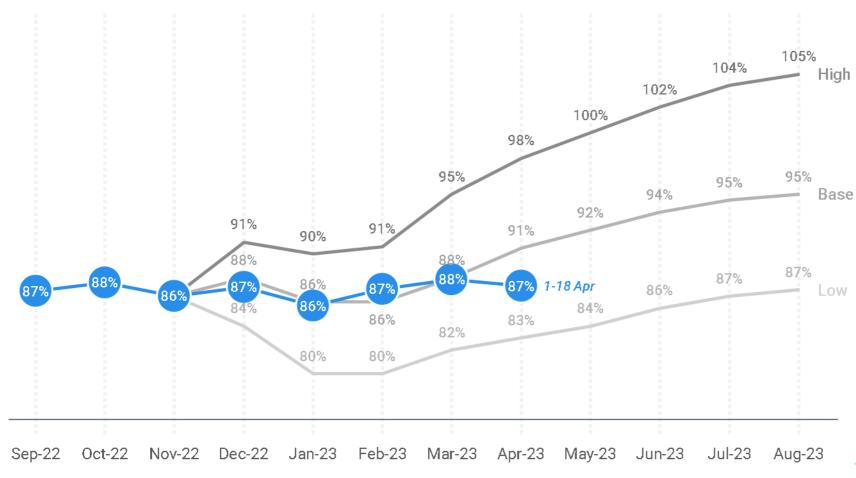
Week 12-18 Apr 2023





# **Overall Situation Compared to the EUROCONTROL Traffic Scenarios**

(base year 2019)



Publication date: December 2022



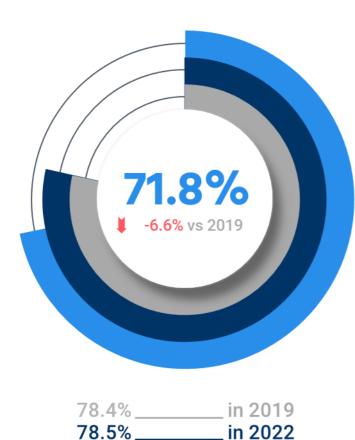
- The latest EUROCONTROL Traffic scenarios were published on 16 December 2022.
- Since that date, network traffic has evolved around the base scenario.
- Flights in April 2023 so far were at 87% of April 2019 levels below our base scenario (91%).
- On a year-to-date basis, network traffic is at 87% of 2019 and +18% vs 2022.

### **Arrival & Departure Punctuality**

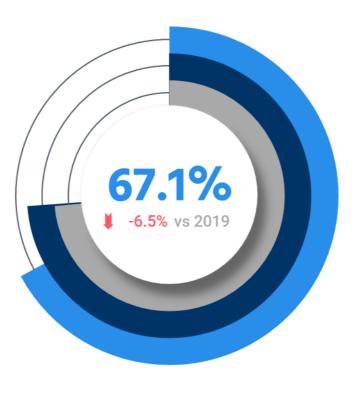
(at top airports for the last week)

Week 12-18 Apr 2023

#### ARRIVAL PUNCTUALITY



#### DEPARTURE PUNCTUALITY



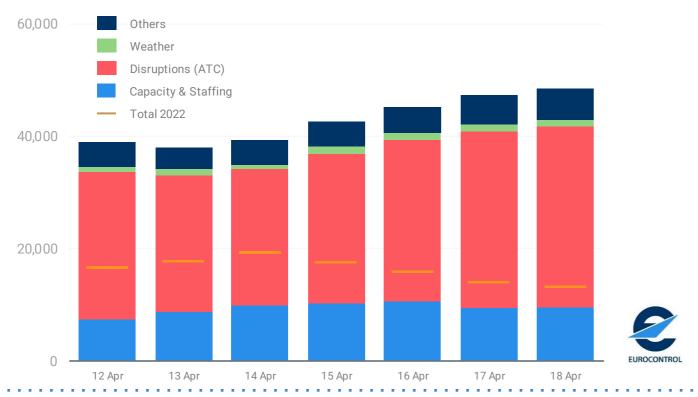
73.6% \_\_\_\_\_\_ in 2019 73.8% \_\_\_\_\_ in 2022

- Punctuality is still impacted by the longterm French industrial action which again influenced network performance throughout the week. There were traffic reduction programs at specific French airports and ATFM delays; however, of those flights that did operate, they were still delayed...
- Both arrival and departure punctuality were 7 percentage points below that of 2019 levels, over the last week.
- Regarding airports, aerodrome capacity delays were recorded throughout the week in Antalya due to runway maintenance. Copenhagen experienced delays due to ATC staffing and Athens airport was affected by radar problems.
- Looking at weather, this impacted several airports throughout the week. High winds affected London Heathrow, London Gatwick and London City. Low visibility & low cloud celling affected Amsterdam Schiphol. Convective weather affected Frankfurt Main.

### **En-Route ATFM Delays**

#### Delays per cause (EUROCONTROL Area)

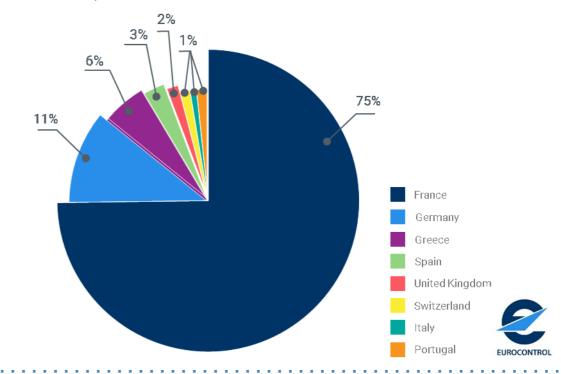
In minutes (7-day average) in 2023



- 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 (7<sup>th</sup> to 12<sup>th</sup> and 16<sup>th</sup> to 31<sup>st</sup>) and in April (1<sup>st</sup> to 16<sup>th</sup>).
- Last week, average en-route ATFM delays were around 40,000 minutes per day, less than half the level of two weeks ago (circa 90,000 minutes per day).

# **Share of en-route ATFM delays**

Week 12-18 Apr 2023



- Due to strikes, France accounted for 75% of all en-route ATFM delays over the last week.
- Germany comes second with 11% of all en-route ATFM delays, mainly concentrated in Karlsruhe, Munich and Bremen ACCs.

### **Top 10 Countries**

#### Dep/Arr to the equivalent week in 2019

Week 12-18 Apr 2023

No.	Country	Average daily flights	% prev week	% prev year	% 2019
1.	United Kingdom	5,261	+2%	<b>+10</b> %	-12%
2.	Spain	4,719	-1%	+4%	-1%
3.	Germany	4,648	+6%	+8%	-22%
4.	France	4,018	+4%	+5%	-12%
5.	Italy	3,530	+2%	+8%	-3%
6.	C• Türkiye	2,687	+7%	+24%	+8%
7.	Netherlands	1,511	+0%	+5%	-12%
8.	Norway	1,375	+26%	<b>+25</b> %	-2%
9.	Portugal	1,246	+2%	<b>+10</b> %	+6%
10.	Switzerland	1,209	-1%	+7%	<b>-11</b> %

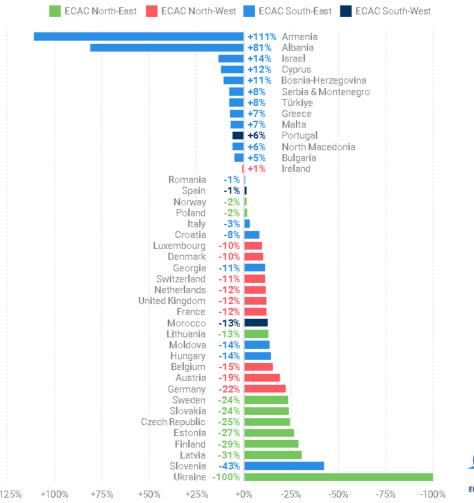


- The top 10 States recorded a slight increase (>3%) on the previous week, mostly due to some operators deploying their summer capacities to the network. No change in the ranking over the previous week except Norway which moved up two places while Switzerland moved down two places.
- Norway recorded a high growth rate (26%), owing to solid increases for Widerøe, SAS, Norwegian, especially on domestic flows but also on flows with Denmark. Türkiye posted a 7% increase owing to Turkish Airlines and Pegasus, on domestic flows. Germany recorded a 6% growth thanks to small aircraft operators and Eurowings on domestic flows.
- Only two States have recorded growth above 2019 (Türkiye and Portugal). Spain, Norway and Italy are relatively close to the pre-covid levels. All other States are still between 22% and 11% below 2019 levels.

# States in the EUROCONTROL Network

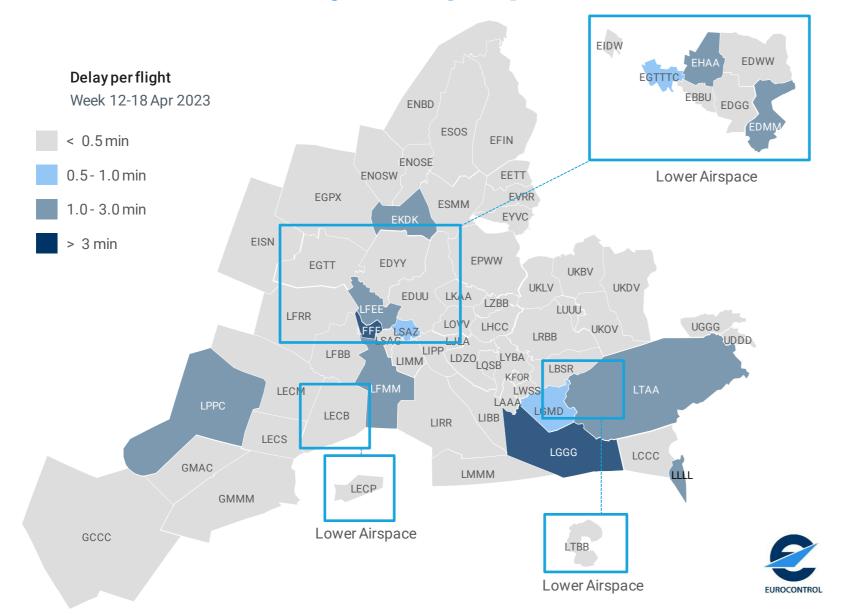
#### Compared to the equivalent week in 2019

Dep/Arr flights for week 12-18 Apr 2023





## **En-Route ATFM delayed flight per Area Control Centre**



- Over the last week, en-route ATFM delays have risen significantly and are above 2022 levels.
- The main reason is related to industrial action in France, which was mainly affecting Paris ACC last week. Other disruptions (e.g. staffing at airport) were affecting Copenhagen.
- Last week, the most affected ACCs were Paris (9 min/flight), Athens (3.1), Copenhagen (2), Tel Aviv (1.5), Marseilles (1.5), Reims (1.3), Lisbon, Munich and Ankara (1.1 each).
- Overall, France was responsible for 75% of all en-route ATFM delays last week, followed by Germany (11%) and Greece (6%) and Spain (3%).

## **Top 10 Aircraft Operators**

Week 12-18 Apr 2023 (avg daily flights)

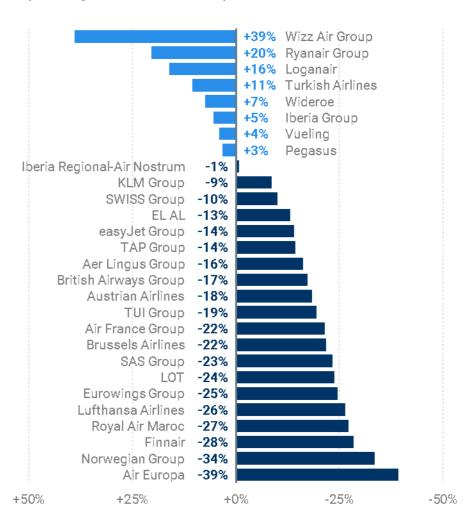
No.	Aircraft operator	Average daily flights	% prev week	% prev year	% 2019
1.	Ryanair Group	3,023	+0%	+9%	+20%
2.	easyJet Group	1,550	-1%	+1%	-14%
3.	Urkish Airlines	1,398	+9%	<b>+25</b> %	+11%
4.	Lufthansa Airlines	1,168	+0%	+0%	-26%
5.	Air France Group	1,004	+3%	+7%	-22%
6.	Wizz Air Group	818	-0%	<b>+12</b> %	+39%
7.	British Airways Group	793	+2%	+13%	<b>-17</b> %
8.	KLM Group	792	-0%	+13%	-9%
9.	SAS Group	646	+23%	+37%	-23%
10.	Vueling	641	-2%	+1%	+4%



- The top 10 Aircraft operators recorded a growth of 2% on the previous week, ranging from -2% (Vueling) to +23% (SAS).
- Last week, five airlines had a stable number of operations compared to the week before (Ryanair, Lufthansa, Wizz Air KLM and easyJet, to a certain extent).
- SAS is the only carrier posting a double digit growth on the week before as the operator deployed its summer capacities adding more domestic flights (e.g. Oslo to Bergen, Stavanger, Trondheim and Ålesund as well as Copenhagen to Ålesund). Turkish Airlines has expanded its domestic routes too (Istanbul to Antalya, Diyarbakir, Izmir, Mugla, Rize)
- Four airlines within the top 10 surpassed their 2019 flight levels: Wizz Air (+39%), Ryanair (+20%), Turkish Airlines (+11%) and Vueling (+4%),.

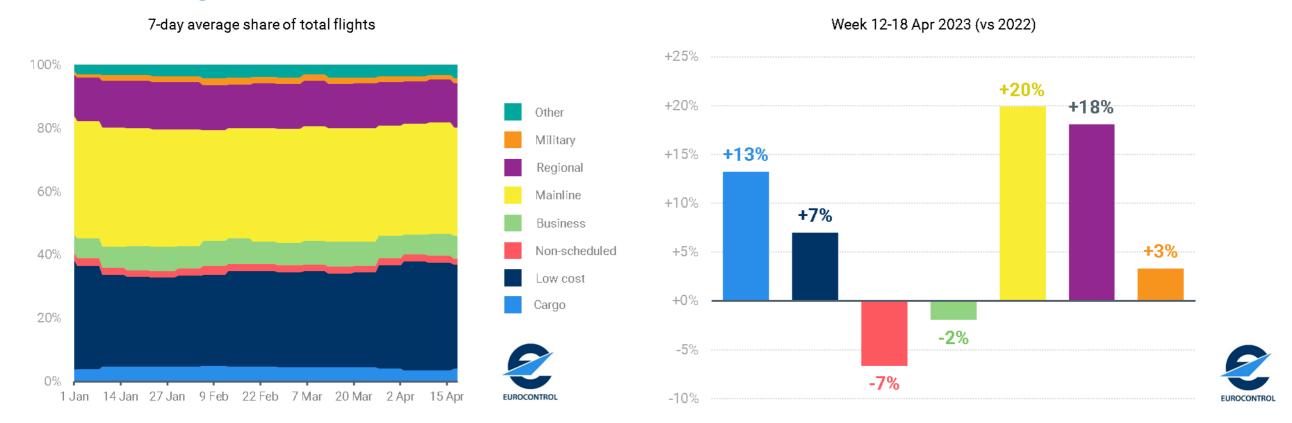
# **Aircraft Operators in the EUROCONTROL Network**

Compared to the equivalent week in 2019 Dep/Arr flights for week 12-18 Apr 2023





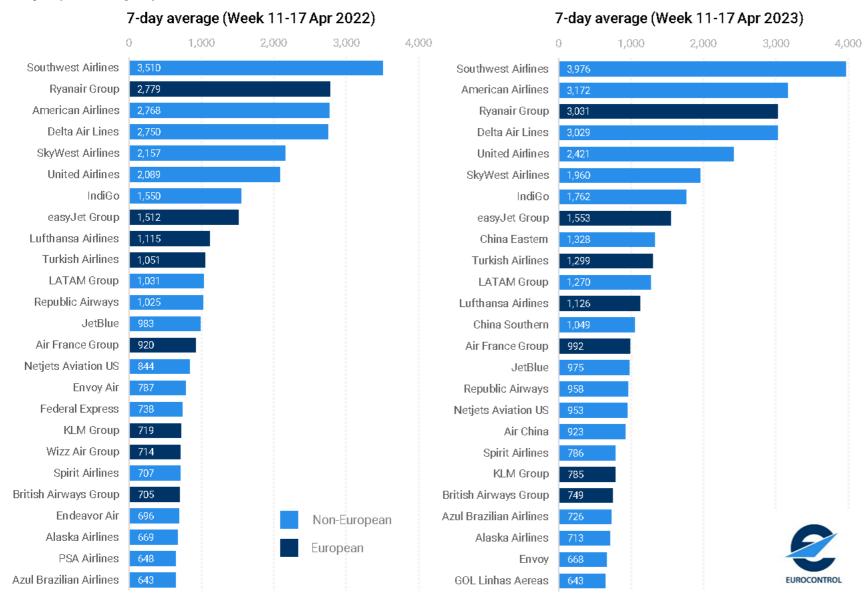
## Market Segments in the EUROCONTROL Network



- Compared to 2022, Mainline (+20%), Regional (+18%), All-Cargo (+13%) and Low-Cost (+7%) are recording sustained growth rates compared to last year owing to the continuing recovery and to the relatively low levels of traffic in 2022.
- Business Aviation (-2%) and Charter (-7%) are recording fewer flights in 2023 compared to 2022 levels.

## **Top 25 Global Aircraft Operators**

(average daily departure flights)



#### Over the last week:

- 7 European airlines are ranked in the Top 25 global aircraft operators (one missing compared to 2022).
- The first European aircraft operator (3<sup>rd</sup>) is Ryanair (up one place compared to two weeks ago).
- The other European airlines in the Top 10 are easyJet (8<sup>th</sup>) and Turkish Airlines (10<sup>th</sup>).
- The top 15 is complemented by Lufthansa (12th) and Air France (14th).
- KLM and British Airways are ranked 20<sup>th</sup> and 21<sup>st</sup>.
- Wizz Air is the only European airline that has slipped out of the top 25 since 2022.

## **Top 10 Airports**



#### **Airport Ranking**

Week 12-18 Apr 2023 (vs 2022)

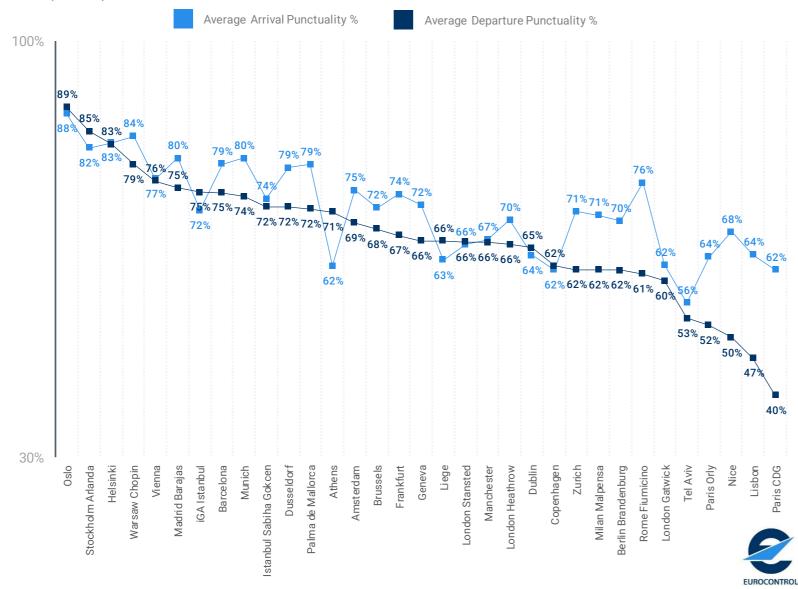
No.	Airport Avg. daily dep/arr flights		vs 2022	vs 2019
1.	iGA Istanbul	1,327	+28%	<b>1</b> +21%
2.	Paris Charles de Gaulle	1,257	<b>1</b> +11%	<b>↓</b> -12%
3.	London Heathrow	1,254	<b>+11</b> %	<b>↓</b> -7%
4.	Amsterdam	1,244	+8%	<b>↓</b> -12%
5.	Frankfurt	1,180	+7%	<b>-20</b> %
6.	Madrid Barajas	1,063	<b>+11</b> %	-8%
7.	Barcelona	895	+5%	<b>↓</b> -10%
8.	Munich	838	+5%	<b>-29</b> %
9.	Rome Fiumicino	722	<b>1</b> +19%	<b>-18</b> %
10.	London Gatwick	702	+9%	<b>-13</b> %

- A few changes in the ranking over the previous week: increase for Paris and Rome, decrease for London Heathrow, Amsterdam and London Gatwick.
- All airports experienced sustained growth on 2022; ranging from 5% (Munich, Barcelona) to 28% (iGA Istanbul).
- iGA Istanbul, which became fully operational on the 6<sup>th</sup> of April 2019, is the only airport in 2023 amongst the top 10 surpassing its 2019 levels.



## **Average Arr/Dep Punctuality at Main Airports**

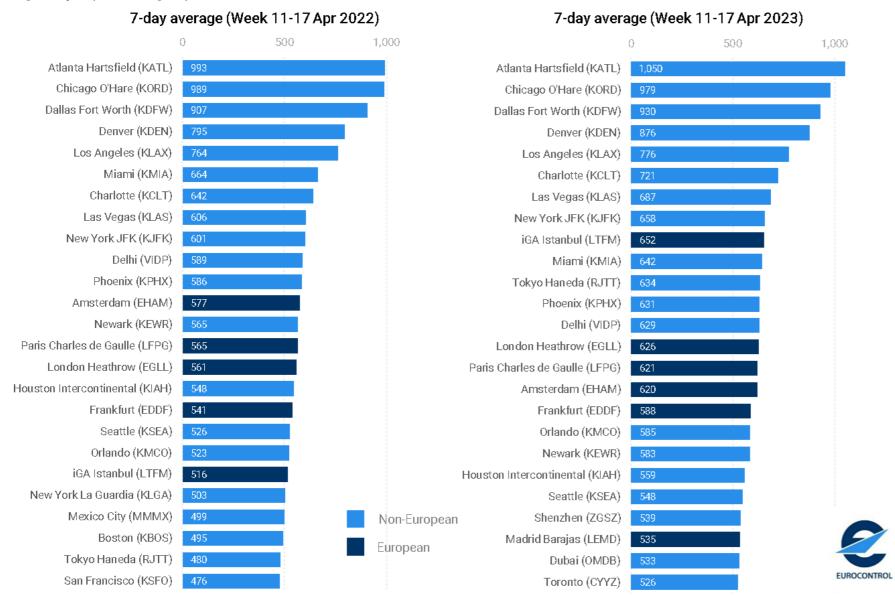
(Week 12-18 Apr 2023)



- 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.
- However a few airports, notably Oslo, Stockholm, iGA Istanbul, Athens, Liège, Copenhagen and Zurich have departure punctuality which 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)

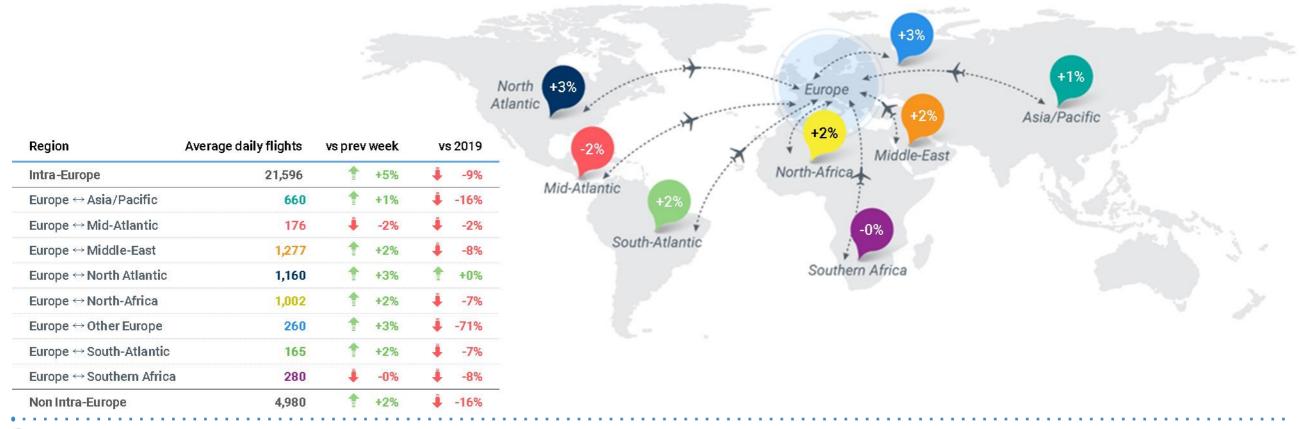


#### Over the last week:

- Six European airports are ranked in the Top 25 of global aircraft operators (one more than in 2022).
- The first European airport (9<sup>th</sup>) is iGA Istanbul.
- The other European airports in the Top 25 are London Heathrow (14<sup>th</sup>), CDG (15<sup>th</sup>), Amsterdam (16<sup>th</sup>), Frankfurt (17<sup>th</sup>) and Madrid (23<sup>rd</sup>).

#### **Traffic Flows**

(average daily departure/arrival flights for week 12-18 Apr 2023)



- The main traffic flow was intra-European with 21,596 daily flights last week, +5% vs the previous week. Inter-Continental flows recorded 4,980 daily flights on average last week, +2% vs the previous week.
- The second regional flow is between Europe and the Middle-East with 1,277 average daily flights last week, showing an increase of +2% vs the previous week.
- The third flow is with North America with 1,160 daily flights, growing by 3% over the previous week.
- Flows with Other Europe (incl. Russian Federation) are still lagging behind and were at -71% compared to 2019.
- Flows between Europe and Asia/Pacific are also still lagging behind, to a lesser extent, at -16% compared to 2019.
- Sudan's civil aviation authority has suspended air navigation services within the Khartoum FIR.

## **Top 10 Long Haul Country-Pairs**

(average daily departure/arrival flights for the last week)
Week 12-18 Apr 2023

No.	Country pair	Average daily flights	% prev week	% prev year	% 2019
1.	UK ↔ US	303	+2%	+28%	-2%
2.	Germany ↔ US	155	+2%	+7%	+0%
3.	France ↔ US	105	+1%	+8%	-4%
4.	Netherlands $\leftrightarrow$ US	79	+4%	+18%	-3%
5.	$\textbf{Ireland}  \leftrightarrow  \textbf{US}$	61	+6%	+21%	+2%
6.	Spain ↔ US	58	+3%	+4%	-8%
7.	Italy ↔ US	58	+6%	+19%	-4%
8.	$UAE \leftrightarrow UK$	55	+0%	+26%	-13%
9.	Russia ↔ UAE	44	-0%	+166%	+1183%
10.	India ↔ UK	39	+1%	+75%	+46%



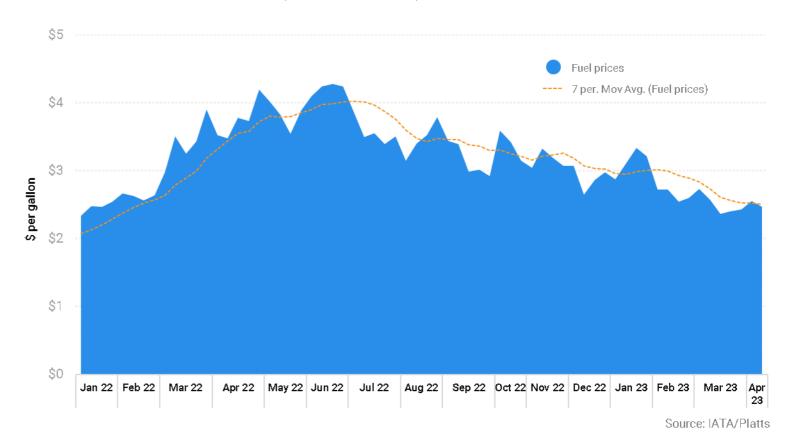
- No change in the ranking over the previous week for the top 10 Long-haul Country-Pairs, except for Ireland ↔ US flow which moved three ranks up and UAE ↔ UK which moved two ranks down.
- The majority of the flows posted an increase on previous week (ranging from 0% to 6%).
- Seven of the top 10 Long Haul Country-Pairs are with the US, the main three being between US and UK, Germany and France.
- The flows between Ireland and the US and Italy and the US showed the highest increase (+6% each).
- A few flows are now above 2019 levels: Ireland ↔ US, Russia ↔ UAE and India ↔ UK
- To be noted: the increase in the number of flights in 2023 on the flow Russia ↔ UAE vs 2022 and 2019.

#### **Economics**

Week 12-18 Apr 2023



## **Jet Fuel Price (Europe)**



- The average price of jet fuel increased to 2.47 USD/gallon on 14 April, it represents a drop of 5% compared to the end of February 2023 and a 14% 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 mid April 2023.

### **GDP** in the European Union

Constant prices and exchange rate, Euro

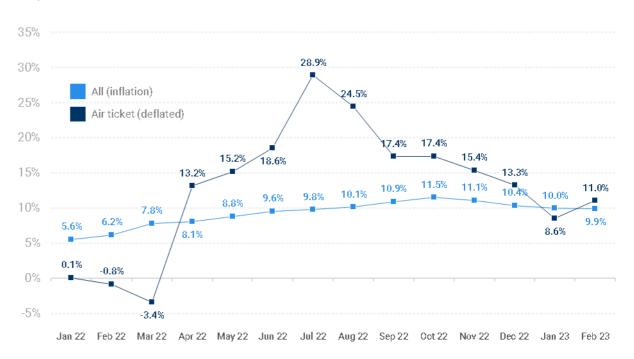


Source: Oxford Economics Ltd.

- According to the latest GDP forecast from Oxford Economics, EU27 economies have posted a positive growth during Q1 2023 (+0.1% vs Q1 2022, revised up from -0.1% in the previous forecast). Economies have returned to growth in Q1 2023 (vs Q1 2022) and the quarterly rate should climb up to +0.5% 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

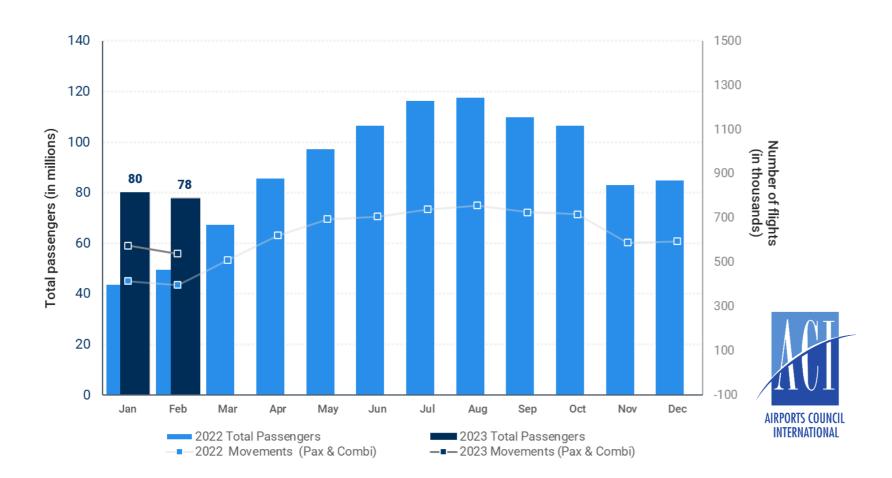
The latest information from EUROSTAT shows the following (no complete sample for March 2023):

- In 2022, prices of air tickets 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.

## Top 40 European airports passengers

Number of passengers and flights per month

Passengers and flights at ECAC top 40 Airports



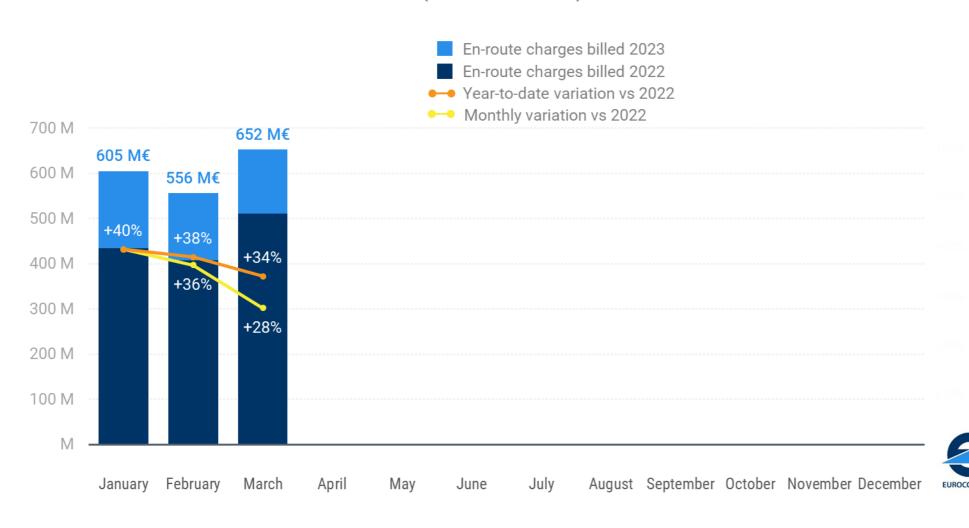
Based on ACI passenger data, the total number of passengers and corresponding aircraft movements for the Top 40\* ECAC airports show:

- 80 million passengers were recorded in January 2023, corresponding to an 83% growth (vs January 2022), while corresponding movements increased by 39% overthe same period.
- 78 million passengers in February 2023, a 56% increase on February 2022, with corresponding movements at airports increasing by 36% over the same period.
- Both January and February 2022 were affected by omicron, hence the comparison is distorted.
- In any case, passenger growth per day in between January and February 2023 (+8%) increased faster than movements growth per day (+4%), explained by the higher load factors recorded with the recovery from COVID-19 crisis.

<sup>\*</sup> The sample is based on Top 40 ECAC airports for year 2022.

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

Year-to-date amount billed: 1,814 M€ (+34% vs 2022)





- 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 March 2023 variation vs March 2022 (+28%) is explained by an increase in Unit Rates of +7% and an increase in Service Units of +20%
- Monthly variations in January (+40%) and February (+36%) were artificially inflated by COVID-19 variant (omicron) which impacted growth in service units early 2022. This artificial effect has diminished in March.
- The total amount billed in March was higher than in February: more days and more seasonal traffic. There is no clear impact of the industrial action in France on March enroute charges.
- On a year-to-date basis, EUROCONTROL has billed 1,814 M€ which is +34% vs 2022.

#### Supporting European Aviation



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 for the largest aircraft 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 eight-week period and consolidates data from 350 airlines, 68 area control centres (ACCs), 55 airports and 43 States. It plays a major role in helping European aviation to recover by providing aviation's key actors with the global view they need to plan effectively.









#### © EUROCONTROL - 2023

This document is published by EUROCONTROL for information purposes. It may be copied in whole or in part, provided that EUROCONTROL is mentioned as the source and it is not used for commercial purposes (i.e. for financial gain). The information in this document may not be modified without prior written permission from EUROCONTROL.

www.eurocontrol.int

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