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EUROCONTROL

EUROPEAN AVIATION OVERVIEW

26 Apr - 02 May 2023

Thursday 04 May 2023

Headlines

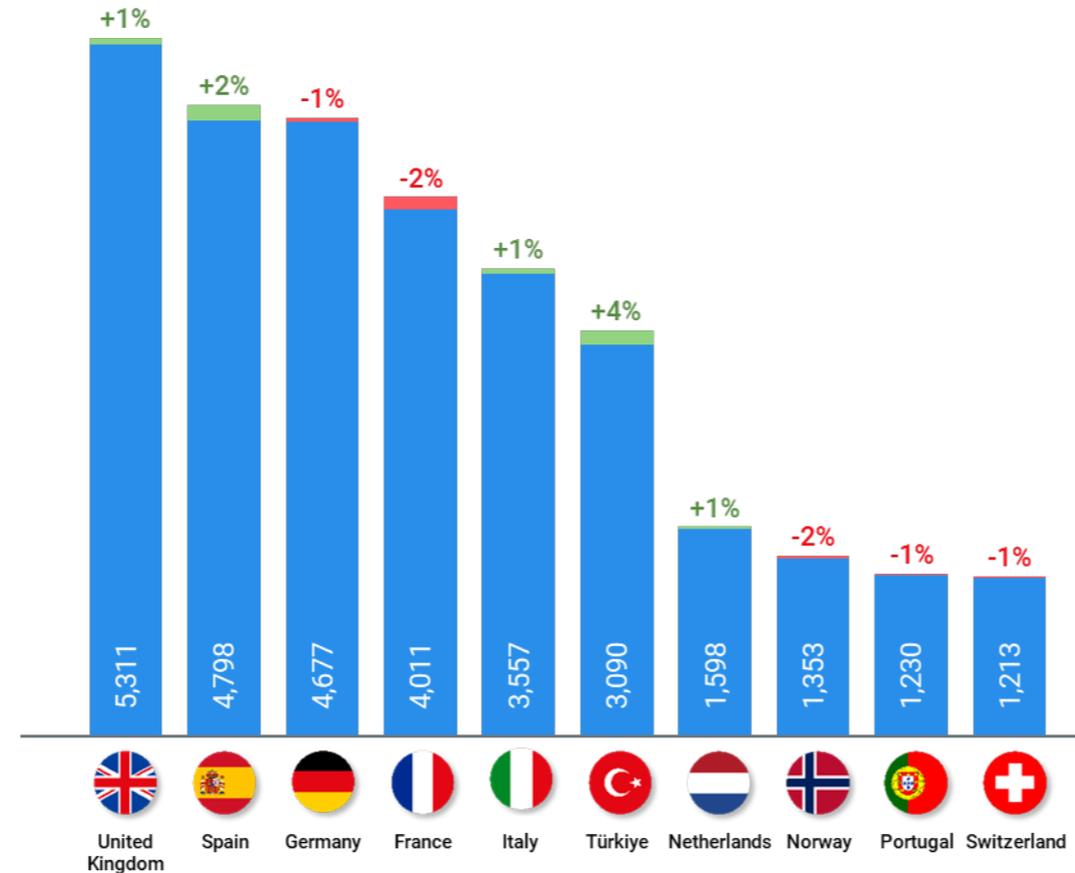
(Week 26 Apr - 02 May 2023)

- ➔ The Network recorded 28,204 average daily flights (+7% vs 2022), increasing (+1%) vs the previous week and standing at 92% of 2019 levels.
- ➔ Commercial airlines have now deployed their summer capacities (e.g. easyJet, British Airways, Vueling, Ryanair and Wizz Air), hence little change compared to the previous week.
- ➔ In April, the number of flights in the Network was 90% of the 2019 levels, matching the base scenario of the flight forecast released in December 2022.
- ➔ On the first two days of May, network traffic was affected by industrial action in France, the continuation of a series of strikes which started earlier this year (reform of pension law).
- ➔ For this reason, France accounted for 58% of all en-route ATFM delays last week.
- ➔ Arrival and Departure punctuality continue to be affected by the long-term French industrial action. They are around 6 percentage points below 2019.
- ➔ The Jet fuel price closed at 2.25 USD/gallon on 28 April, decreasing (-9%) on last edition. Current prices have decreased by 21% compared to the ones at the beginning of the year.

Top 10 Busiest States

On week 26 Apr - 02 May 2023

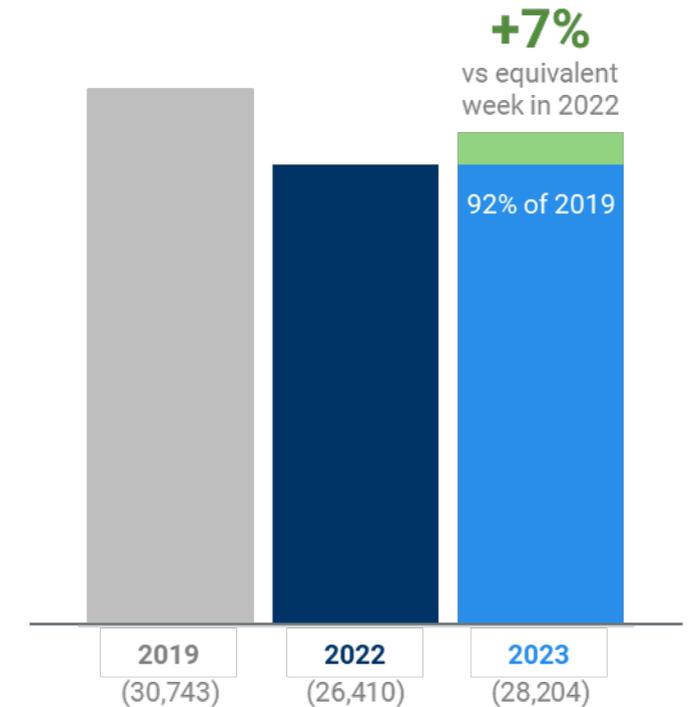
(all flights incl. overflights compared with previous week)



Traffic Situation

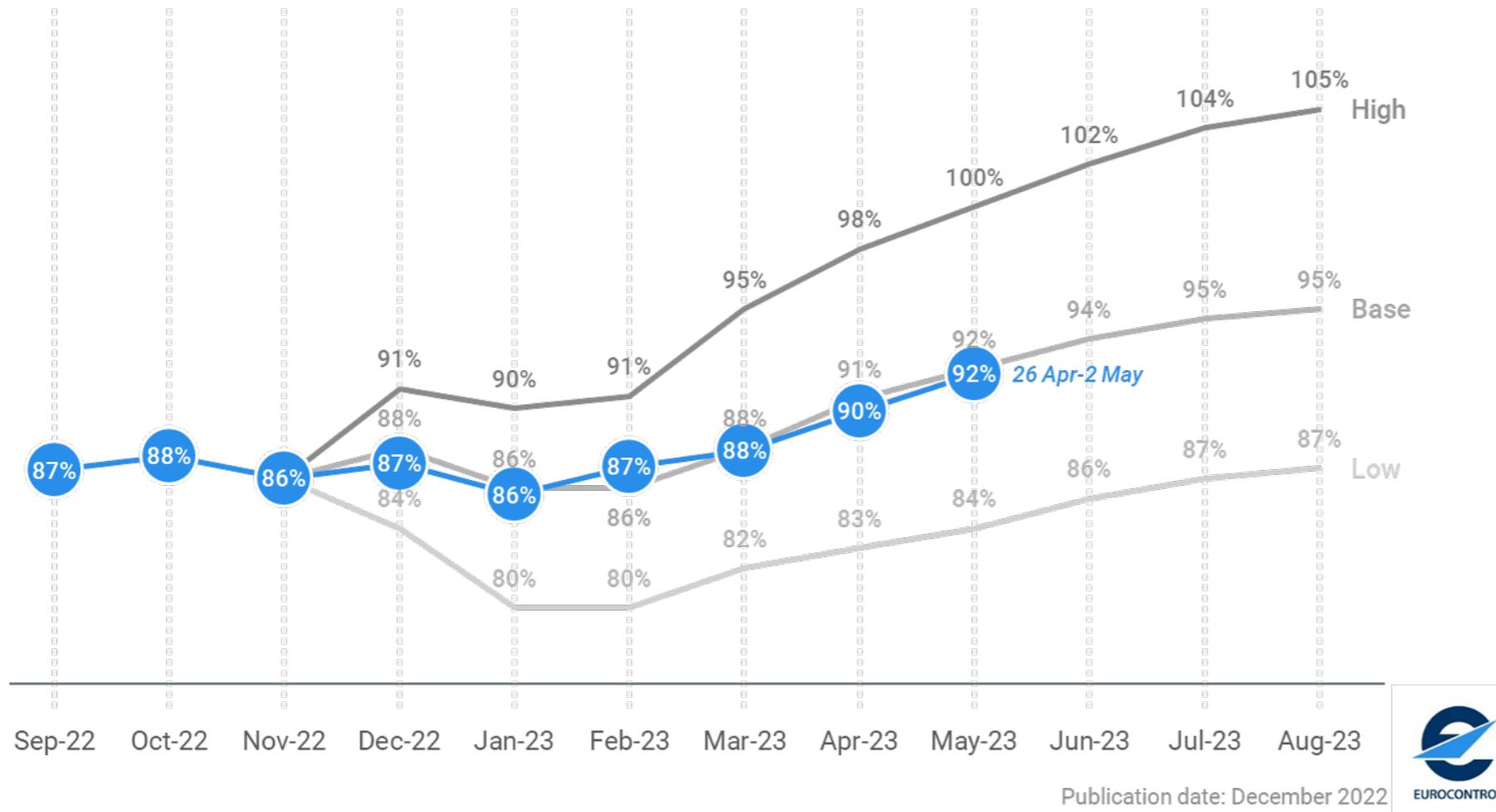
Average daily flights (including overflights)

Week 26 Apr - 02 May 2023



Overall Situation Compared to the EUROCONTROL Traffic Scenarios

(base year 2019)



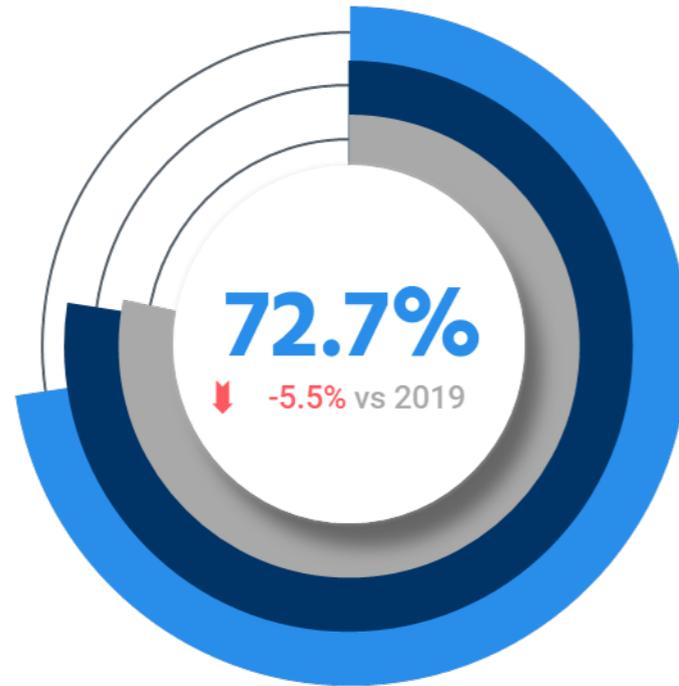
- ➔ The latest EUROCONTROL Traffic scenarios were published on 16 December 2022.
- ➔ Since that date, network traffic has evolved around the base scenario.
- ➔ Flights in April 2023 closed at 90% of April 2019 levels in line with our base scenario (91%).
- ➔ It is too soon to derive a preliminary value for May 2023, hence the average figure over the week 26 Apr – 02 May, standing at 92% of 2019 corresponding week, is shown on the graph.
- ➔ 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)

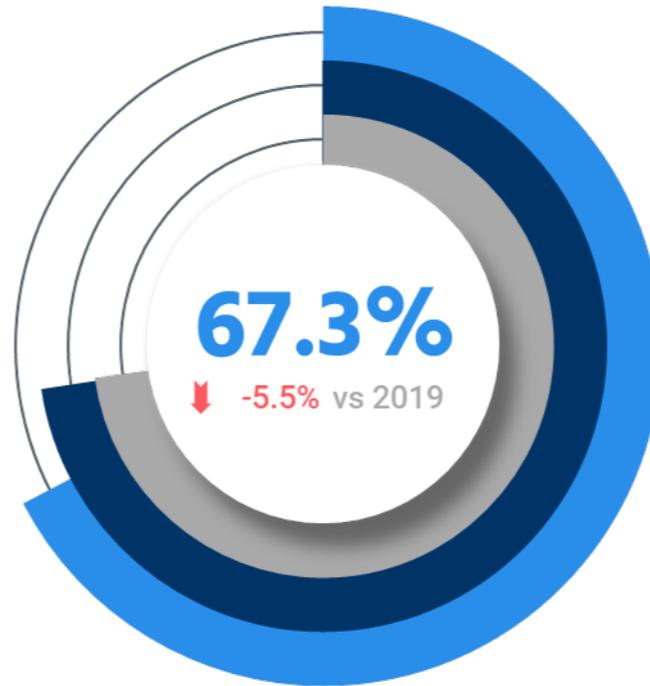
Week 26 Apr - 02 May 2023

ARRIVAL PUNCTUALITY



78.2% _____ in 2019
77.4% _____ in 2022

DEPARTURE PUNCTUALITY



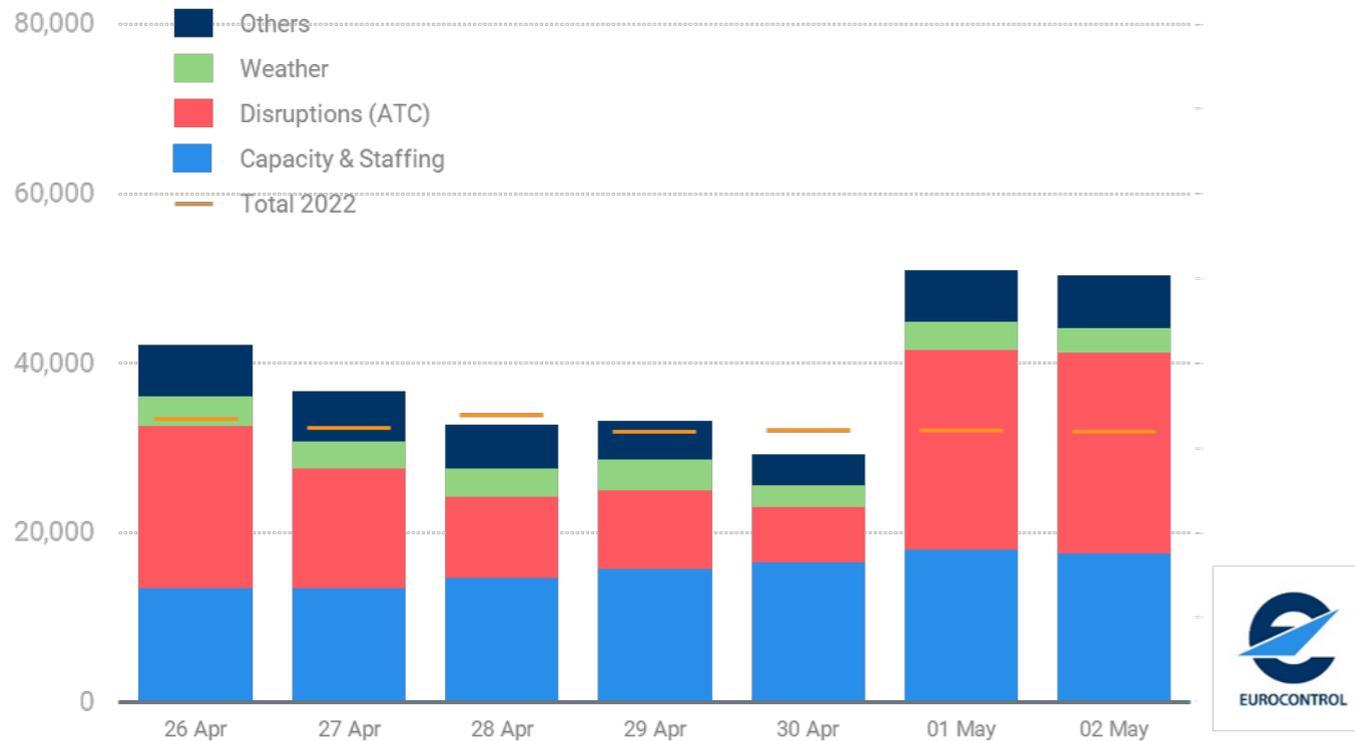
72.8% _____ in 2019
72.6% _____ in 2022

- ➔ Punctuality continues to be impacted by the long-term French industrial action, notably on 01 May. Traffic reduction programs at specific French airports continue, with long ATFM delays impacting those airlines operating through France.
- ➔ Network punctuality for arrival and departure were ~6 percentage points below that of 2019 levels, over the last week.
- ➔ Regarding airports, aerodrome capacity delays were recorded throughout the week in Copenhagen due to ATC staffing, Antalya saw delays due to WIP and Athens airport was affected by ATC equipment problems. Looking at weather, this impacted Istanbul IGA and Barcelona airports on the 26 and 30 April respectively, with some seasonal weather (cumulonimbus) delay being observed at Frankfurt Main airport.

En-Route ATFM Delays

Delays per cause (EUROCONTROL Area)

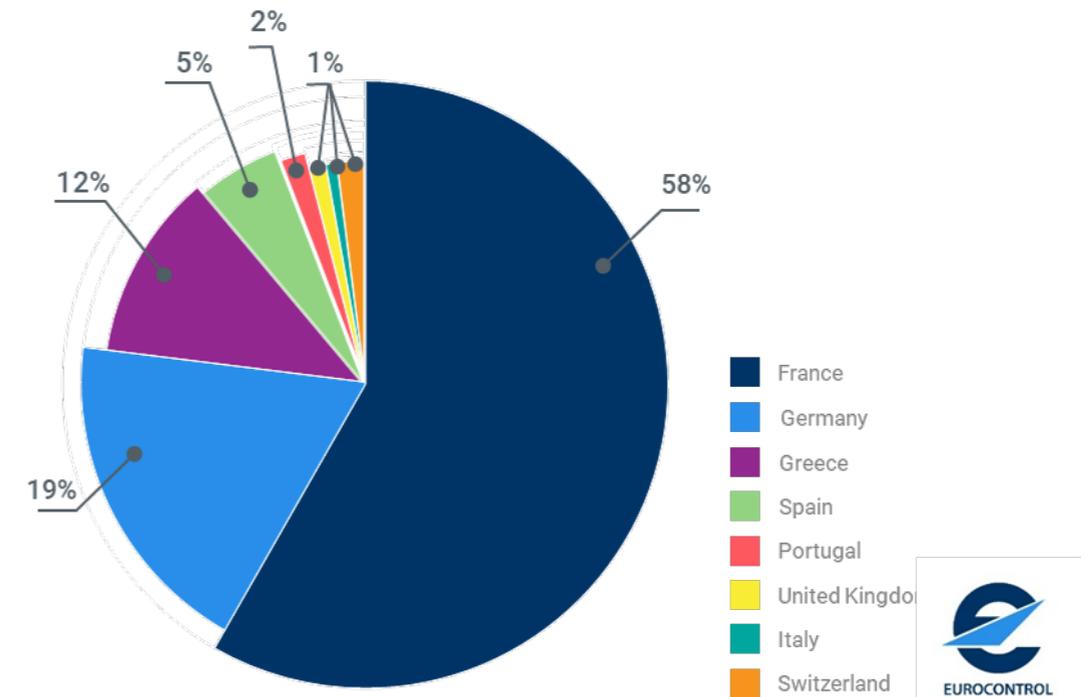
In minutes (7-day average) in 2023



- ➔ En-route ATFM delays have been higher than in 2022, especially on the 1st and 2nd of May.
- ➔ This is mainly due to industrial action in France caused by a reform of pension law.
- ➔ Last week, average en-route ATFM delays were just below 40,000 minutes per day, on average, still high but improving on the levels recorded a month ago (circa 94,000 minutes per day over the period 31 Mar – 06 Apr 2023).

Share of en-route ATFM delays

Week 26 Apr - 02 May 2023



- ➔ Due to strikes, France accounted for 58% of all en-route ATFM delays over the last week.
- ➔ Germany comes second with 19% of all en-route ATFM delays, mainly concentrated in Karlsruhe, Munich and Bremen ACCs.
- ➔ Greece comes third with 12% of all en-route ATFM delays, due to staffing issues.

Top 10 Countries

Dep/Arr to the equivalent week in 2019

Week 26 Apr - 02 May 2023

No.	Country	Average daily flights	% prev week	% prev year	% 2019
1.	United Kingdom	5,311	+1%	S +6%	W -10%
2.	Spain	4,798	+2%	S +7%	W -0%
3.	Germany	4,677	-1%	W -0%	W -19%
4.	France	4,011	-2%	S +1%	W -12%
5.	Italy	3,557	+1%	S +7%	W -2%
6.	Türkiye	3,090	+4%	S +19%	S +8%
7.	Netherlands	1,598	+1%	S +0%	W -10%
8.	Norway	1,353	-2%	W -2%	S +7%
9.	Portugal	1,230	-1%	S +8%	S +4%
10.	Switzerland	1,213	-1%	S +7%	W -7%

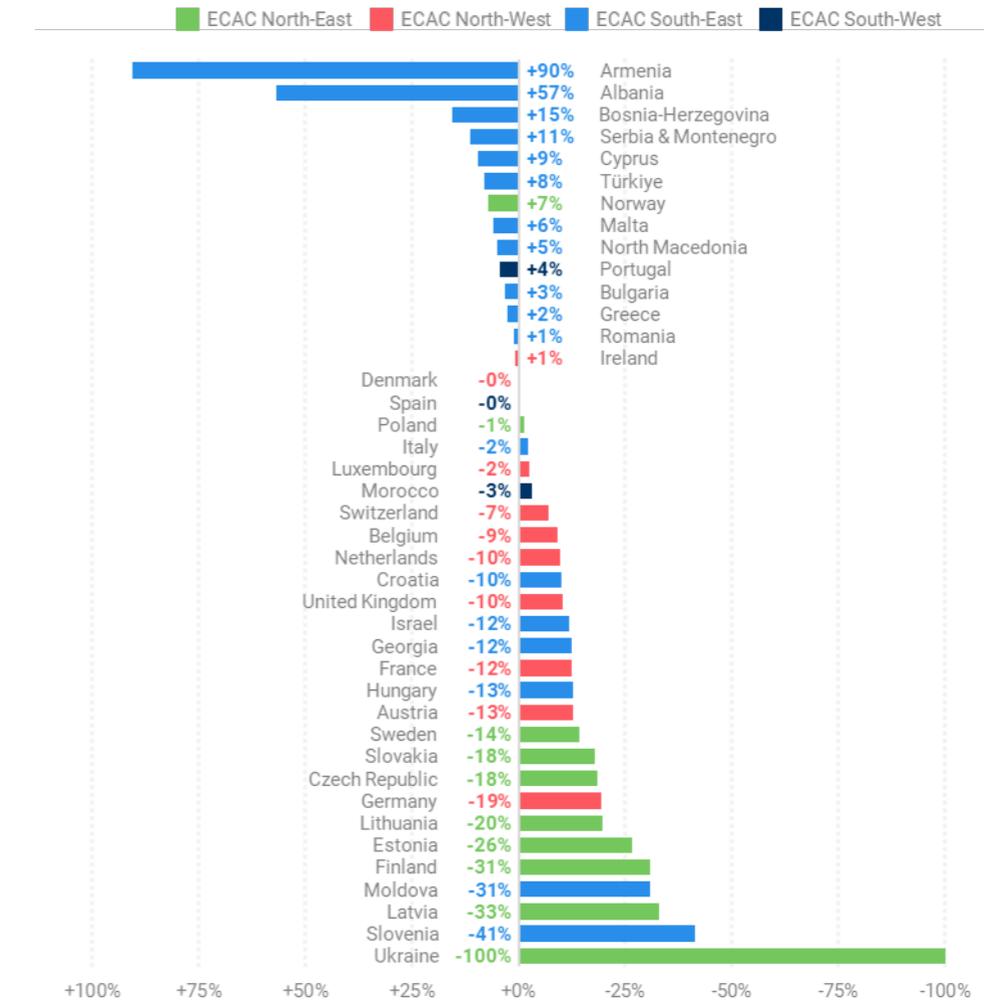


- ➔ The top 10 States recorded similar traffic levels (+0.6%) on the previous week. No change in the ranking compared to the previous edition.
- ➔ Türkiye recorded a growth rate of 4%, owing to increases from Russian operators (Aeroflot, Red Wings) as well as charter airlines (Enter Air). Spain posted a 2% increase due to light aircraft operators and increased regional operations with Canary Islands.
- ➔ Only three States have now recorded growth above 2019 (Türkiye, Norway and Portugal). Spain and Italy are relatively close to the pre-COVID levels. All other States are still between 19% and 10% below 2019 levels.

States in the EUROCONTROL Network

Compared to the equivalent week in 2019

Dep/Arr flights for week 26 Apr - 02 May 2023



Top 10 Aircraft Operators

Week 26 Apr - 02 May 2023 (avg daily flights)

No.	Aircraft operator	Average daily flights	% prev week	% prev year	% 2019
1.	 Ryanair Group	3,014	+1%	S +7%	S +19%
2.	 easyJet Group	1,561	+0%	S +2%	W -14%
3.	 Turkish Airlines	1,521	-1%	S +17%	S +12%
4.	 Lufthansa Airlines	1,177	+1%	W -1%	W -23%
5.	 Air France Group	1,012	-3%	W -1%	W -21%
6.	 KLM Group	837	+3%	S +5%	W -10%
7.	 British Airways Group	802	-0%	S +18%	W -15%
8.	 Wizz Air Group	796	-1%	S +10%	S +27%
9.	 SAS Group	643	-2%	S +8%	S +33%
10.	 Vueling	622	+0%	S +6%	W -4%

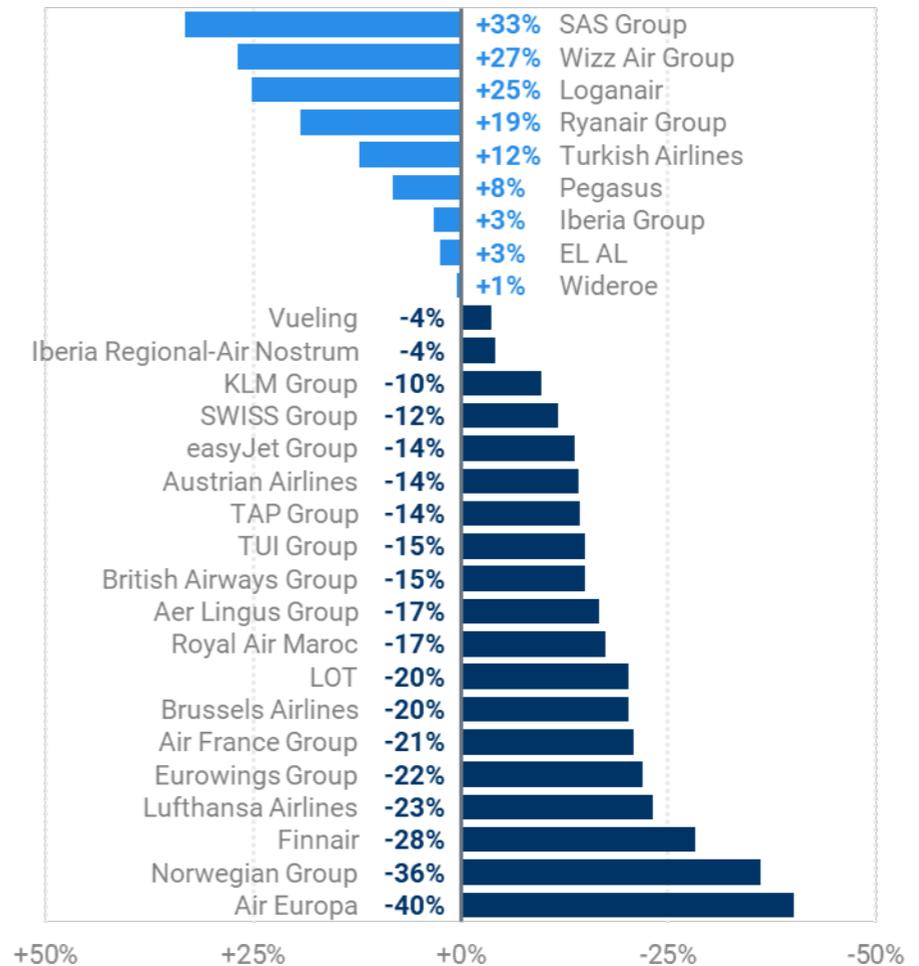


- ➔ The top 10 aircraft operators recorded the same number of flights on the previous week, ranging from -3% (Air France) to +3% (KLM).
- ➔ Last week, five airlines had a stable number of operations compared to the week before (easyJet, British Airways and Vueling as well as Ryanair and Wizz Air, to a certain extent).
- ➔ KLM posted a 3% growth on the week before as the operator added flights on the flows Netherlands ↔ Germany and Netherlands ↔ Greece. Turkish Airlines has reduced its flights on some domestic routes (Istanbul to Adana, Diyarbakir) as well as its flights with Saudi Arabia (Istanbul to Jeddah)
- ➔ Four airlines within the top 10 surpassed their 2019 flight levels: SAS (+33%), Wizz Air (+27%), Ryanair (+19%) and Turkish Airlines (+12%).

Aircraft Operators in the EUROCONTROL Network

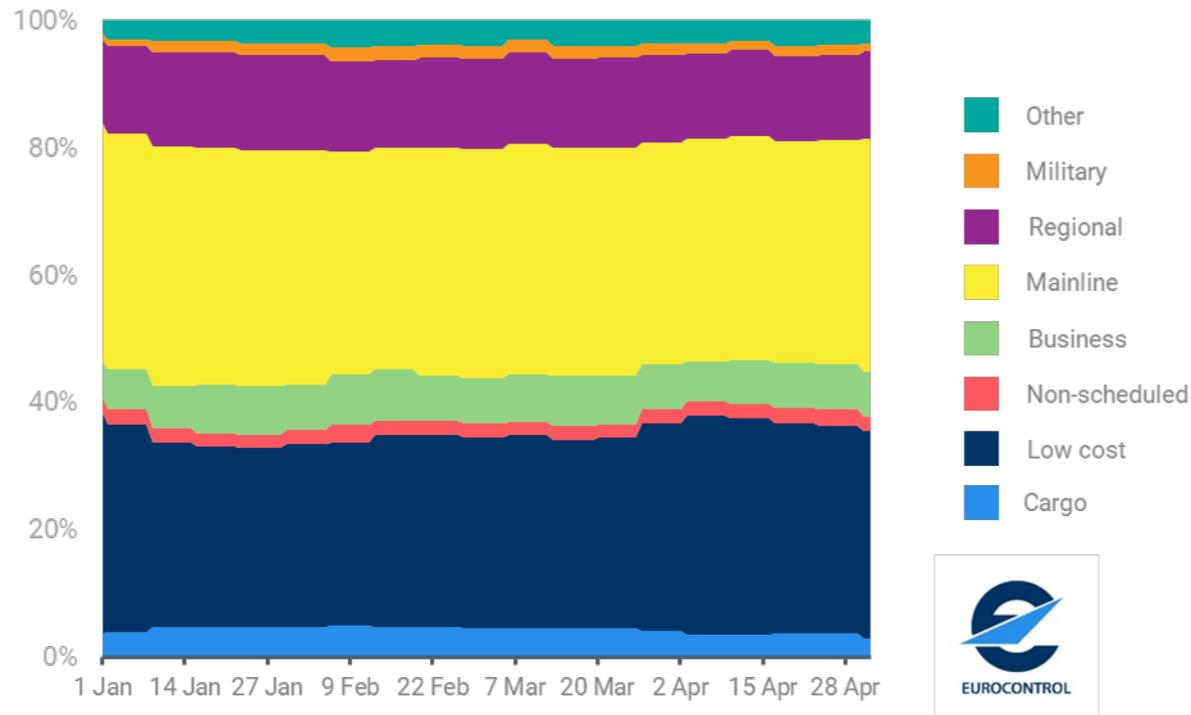
Compared to the equivalent week in 2019

Dep/Arr flights for week 26 Apr - 02 May 2023

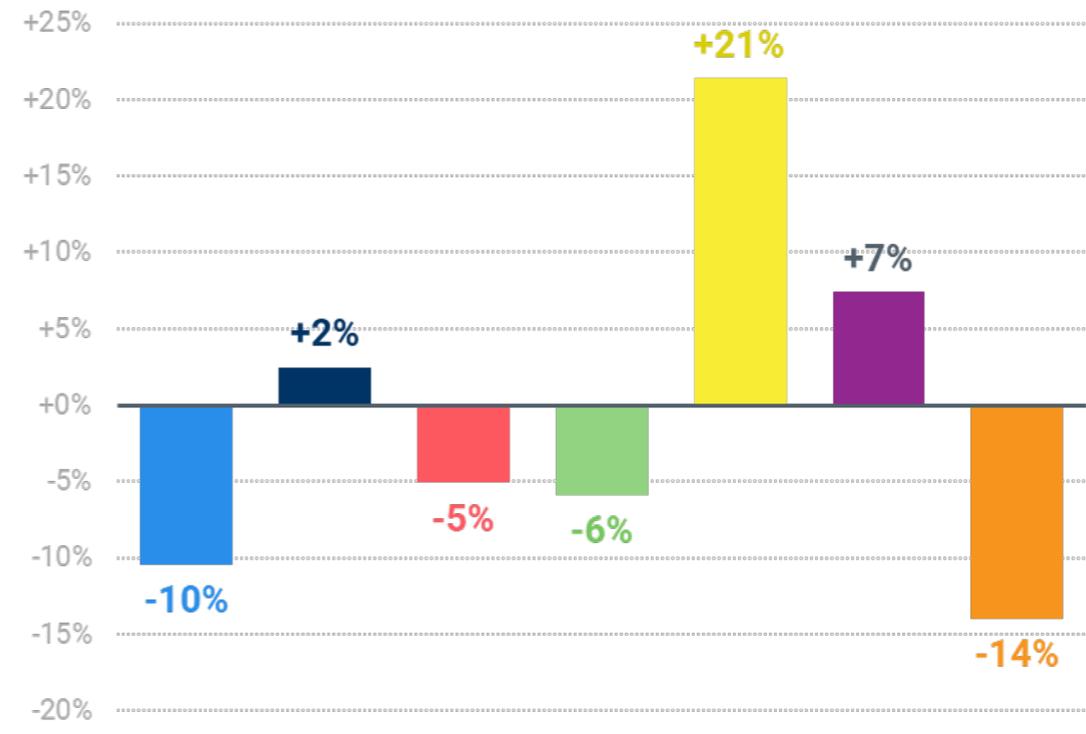


Market Segments in the EUROCONTROL Network

7-day average share of total flights



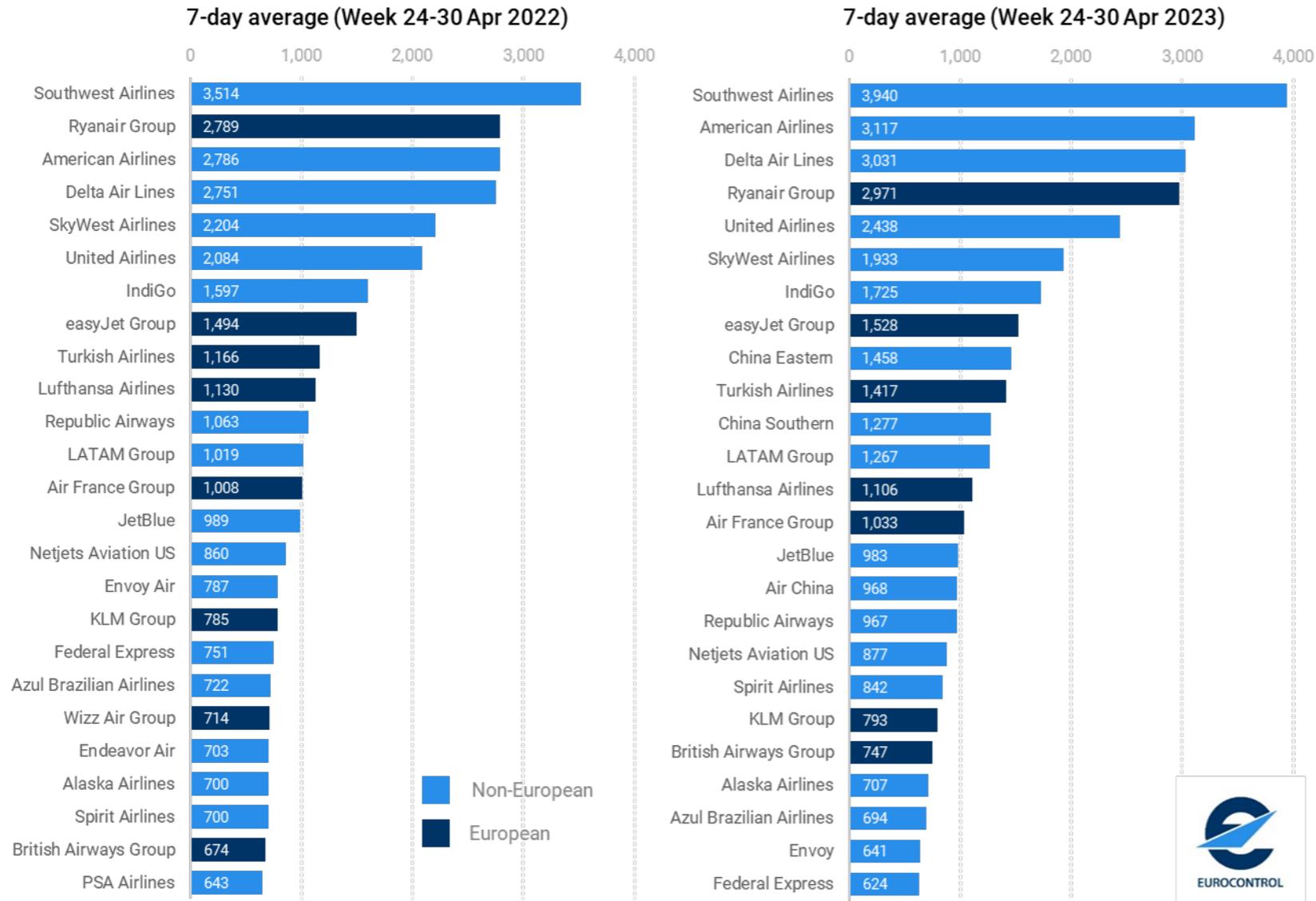
Week 26 Apr - 02 May 2023 (vs 2022)



- ➔ Compared to 2022, Mainline (+21%), Regional (+7%), and Low-Cost (+2%) are recording growth compared to last year owing to the continuing recovery and to the relatively low levels of traffic in 2022.
- ➔ BusinessAviation (-6%) and All-Cargo (-10%) are now recording fewer flights in 2023 compared to 2022 levels. All-Cargo market share has now stabilized (representing a market share of 3.6% of all flights in April 2023) and is now levelling off (no more rebound effect on 2022 events: Omicron, start of the Ukraine invasion) with the start of the summer schedules. Business Aviation (6.8% of the total flights in April 2023) is levelling off too as the commercial airline activity (mainline, regional, low-cost) has now almost closed the gap between 2023 and 2019.
- ➔ Charter (-5%), accounting for a 2.5% market share of all flights in April 2023, records fewer flights, owing to some reductions on flows within Israel, between Europe and Egypt, Israel and Asia/Pacific (compared to April 2022).

Top 25 Global Aircraft Operators

(averaged daily departure flights)



Over the last week:

- Seven European airlines are ranked in the Top 25 global aircraft operators (one missing compared to 2022).
- The first European aircraft operator (4th) is Ryanair (down one place compared to two weeks ago).
- The other European airlines in the Top 10 are easyJet (8th) and Turkish Airlines (10th).
- The top 15 is complemented by Lufthansa (13th) and Air France (14th).
- KLM and British Airways are ranked 20th and 21st.
- Wizz Air is the only European airline that has slipped out of the top 25 since 2022.

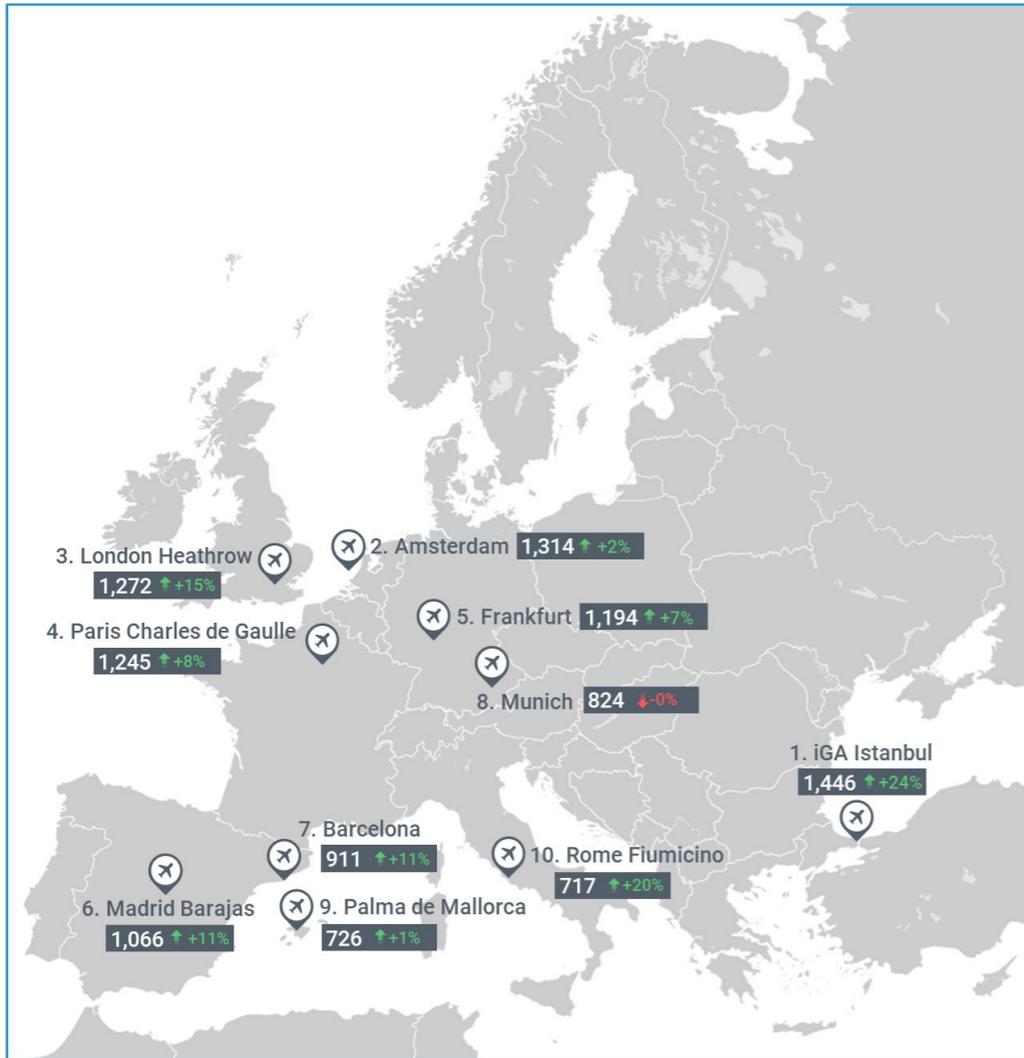


Top 10 Airports

Airport Ranking

Week 26 Apr - 02 May 2023 (vs 2019)

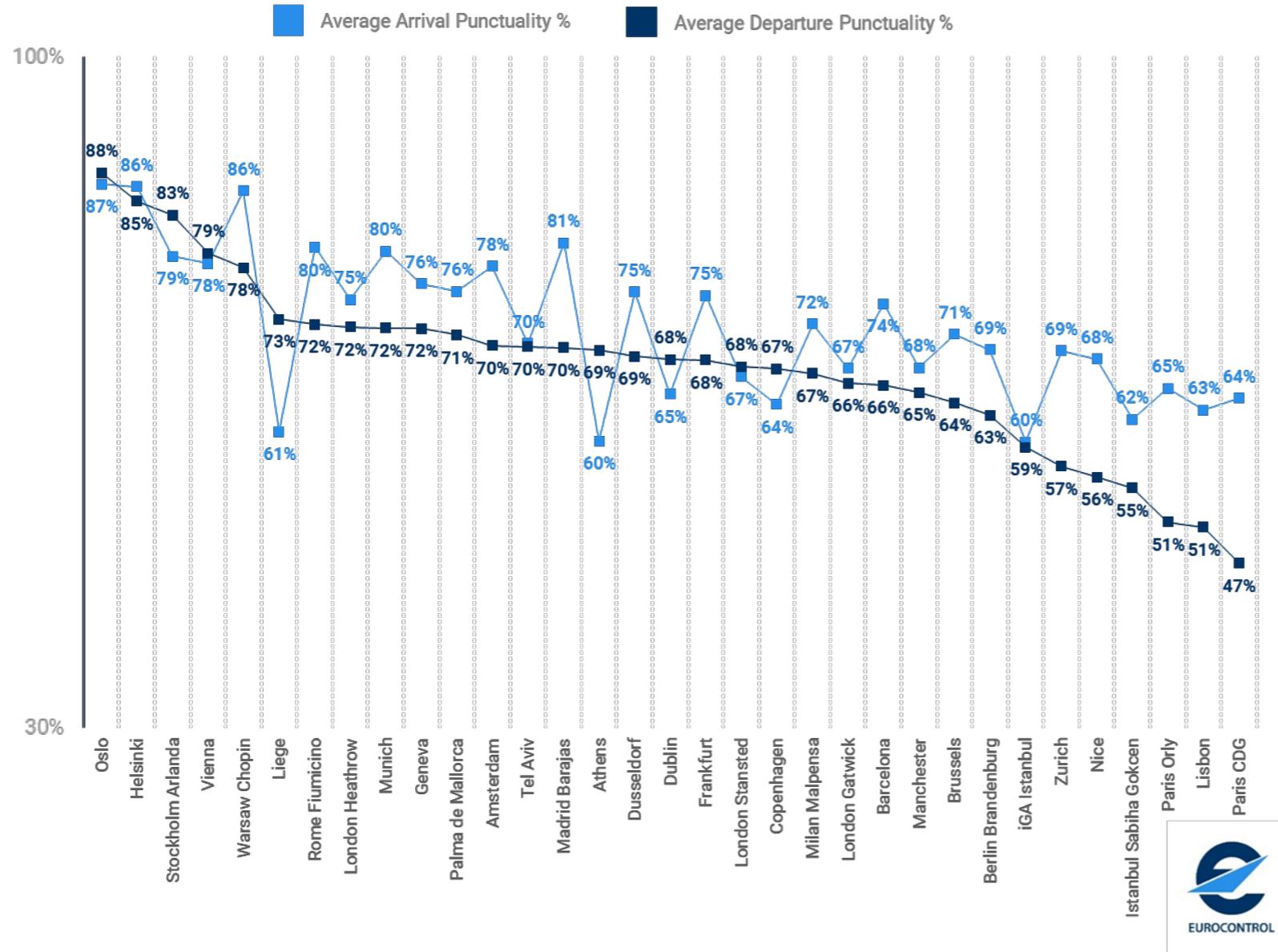
No.	Airport	Avg. daily dep/arr flights	vs 2022	vs 2019
1.	iGA Istanbul	1,446	S +24%	S +21%
2.	Amsterdam	1,314	S +2%	W -10%
3.	London Heathrow	1,272	S +15%	W -5%
4.	Paris Charles de Gaulle	1,245	S +8%	W -13%
5.	Frankfurt	1,194	S +7%	W -18%
6.	Madrid Barajas	1,066	S +11%	W -10%
7.	Barcelona	911	S +11%	W -9%
8.	Munich	824	W -0%	W -26%
9.	Palma de Mallorca	726	S +1%	S +7%
10.	Rome Fiumicino	717	S +20%	W -17%



- ➔ Some changes in the ranking compared to the previous edition: swap between Paris CDG and London Heathrow. Palma de Mallorca entered the Top 10. And London Gatwick exited.
- ➔ Almost all airports experienced sustained growth on 2022; ranging from 1% (Palma de Mallorca) to 24% (iGA Istanbul).
- ➔ iGA Istanbul and Palma de Mallorca are the two airports in 2023 amongst the top 10 surpassing their 2019 levels.

Average Arr/Dep Punctuality at Main Airports

(Week 26 Apr - 02 May 2023)



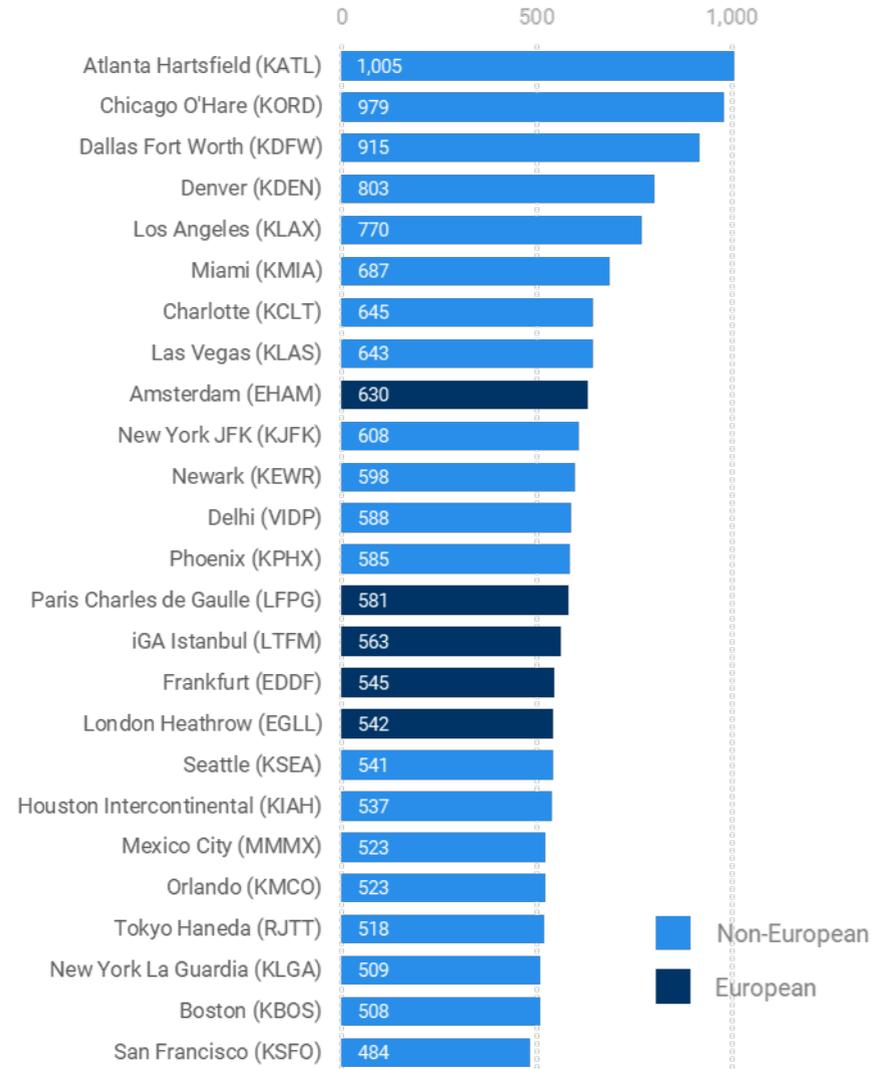
- ➔ At most airports, arrival punctuality is higher (i.e. better) than departure punctuality.
- ➔ After having deteriorated in early March because of significant en-route ATFM delays related to industrial action in France, arrival and departure punctuality have only marginally improved in April and are still worse than in 2022.
- ➔ However a few airports, notably Oslo, Stockholm, Vienna, Liège, Athens, Dublin, London Stansted and Copenhagen have departure punctuality which is higher than arrival punctuality which indicates that these airports have been able to absorb delays.



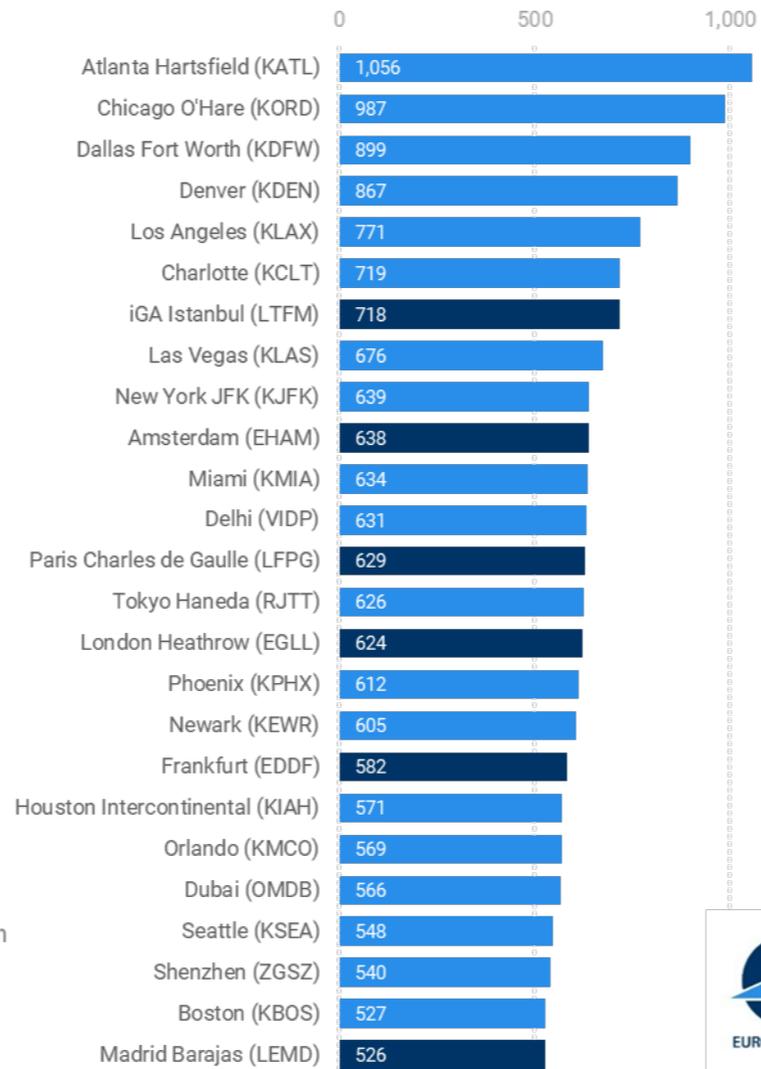
Top 25 Global Airport Departures

(averaged daily departure flights)

7-day average (Week 24-30 Apr 2022)



7-day average (Week 24-30 Apr 2023)



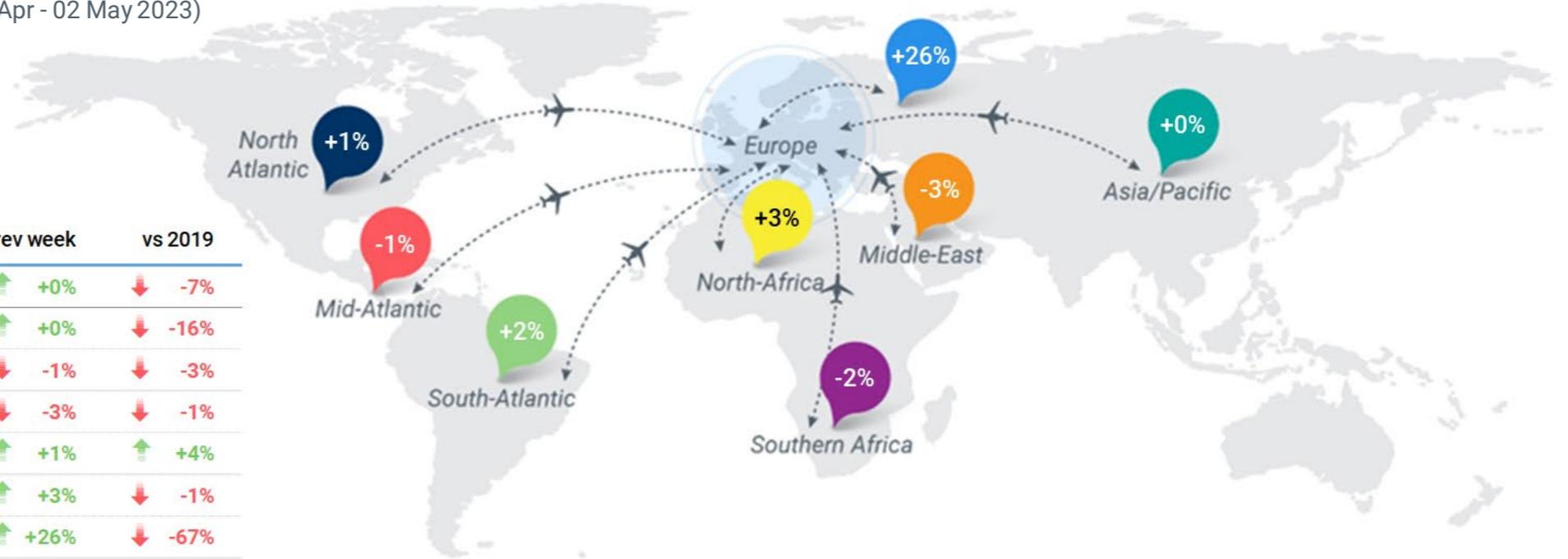
Over the last week:

- ✈ Six European airports are ranked in the Top 25 of global airport departures (one more than in 2022).
- ✈ The first European airport (7th) is iGA Istanbul.
- ✈ The other European airports in the Top 25 are Amsterdam (10th), CDG (13th), Heathrow (15th), Frankfurt (18th) and Madrid (25th).
- ✈ Last year, at the same period, Madrid was not part of the Top 25.



Traffic Flows

(average daily departure/arrival flights for week 26 Apr - 02 May 2023)



Region	Average daily flights	vs prev week	vs 2019
Intra-Europe	22,057	↑ +0%	↓ -7%
Europe ↔ Asia/Pacific	669	↑ +0%	↓ -16%
Europe ↔ Mid-Atlantic	169	↓ -1%	↓ -3%
Europe ↔ Middle-East	1,386	↓ -3%	↓ -1%
Europe ↔ North Atlantic	1,192	↑ +1%	↑ +4%
Europe ↔ North-Africa	1,103	↑ +3%	↓ -1%
Europe ↔ Other Europe	363	↑ +26%	↓ -67%
Europe ↔ South-Atlantic	167	↑ +2%	↓ -6%
Europe ↔ Southern Africa	289	↓ -2%	↓ -4%
Non Intra-Europe	5,339	↑ +1%	↓ -14%

- ➔ The main traffic flow was intra-European with 22,057 daily flights last week, in line with the previous week. Inter-Continental flows recorded 5,339 daily flights on average last week, +1% vs the previous week.
- ➔ The second regional flow is between Europe and the Middle-East with 1,386 average daily flights last week, showing a decrease of 3% vs the previous week.
- ➔ The third flow is with North America with 1,192 daily flights, stable (+1%) on the previous week.
- ➔ Flows with Other Europe (incl. Russian Federation) are still lagging behind and were at -67% compared to 2019.
- ➔ Flows between Europe and Asia/Pacific are still lagging behind, to a lesser extent, at -16% compared to 2019. European flows with China (incl. Hong-Kong) recorded 172 daily flights on average over 23-29 April 2023.
- ➔ 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 26 Apr - 02 May 2023

No.	Country pair	Average daily flights	% prev week	% prev year		% 2019	
1.	UK ↔ US	305	-1%	↑	+23%	↓	-1%
2.	Germany ↔ US	161	+3%	↑	+5%	↑	+6%
3.	France ↔ US	108	-4%	↑	+6%	↓	-4%
4.	Netherlands ↔ US	77	-2%	↑	+15%	↓	-6%
5.	Ireland ↔ US	64	+2%	↑	+18%	↑	+4%
6.	Italy ↔ US	63	+0%	↑	+30%	↑	+7%
7.	Spain ↔ US	62	+2%	↑	+12%	↑	+2%
8.	UAE ↔ UK	55	+2%	↑	+25%	↑	+14%
9.	Russia ↔ UAE	41	-6%	↑	+107%	↑	+1681%
10.	Switzerland ↔ US	39	+1%	↑	+28%	↑	+15%



- ➔ No change in the ranking over the previous week for the top 10 Long-haul Country-Pairs, except for Spain ↔ US and Italy ↔ US swapping ranks and Switzerland ↔ US which entered the top 10.
- ➔ Half of the flows posted an increase on previous week (ranging from 0% to 3%).
- ➔ Eight of the top 10 Long Haul Country-Pairs are with the US, the main three being between US and UK, Germany and France.
- ➔ All flows posted an increase on 2022 (same week).
- ➔ All but three flows are now above 2019 levels.
- ➔ To be noted: the increase in the number of flights in 2023 on the flow Russia ↔ UAE vs 2022 and 2019.

Economics

Week 26 Apr - 02 May 2023

28 Apr 2023
avg fuel price:

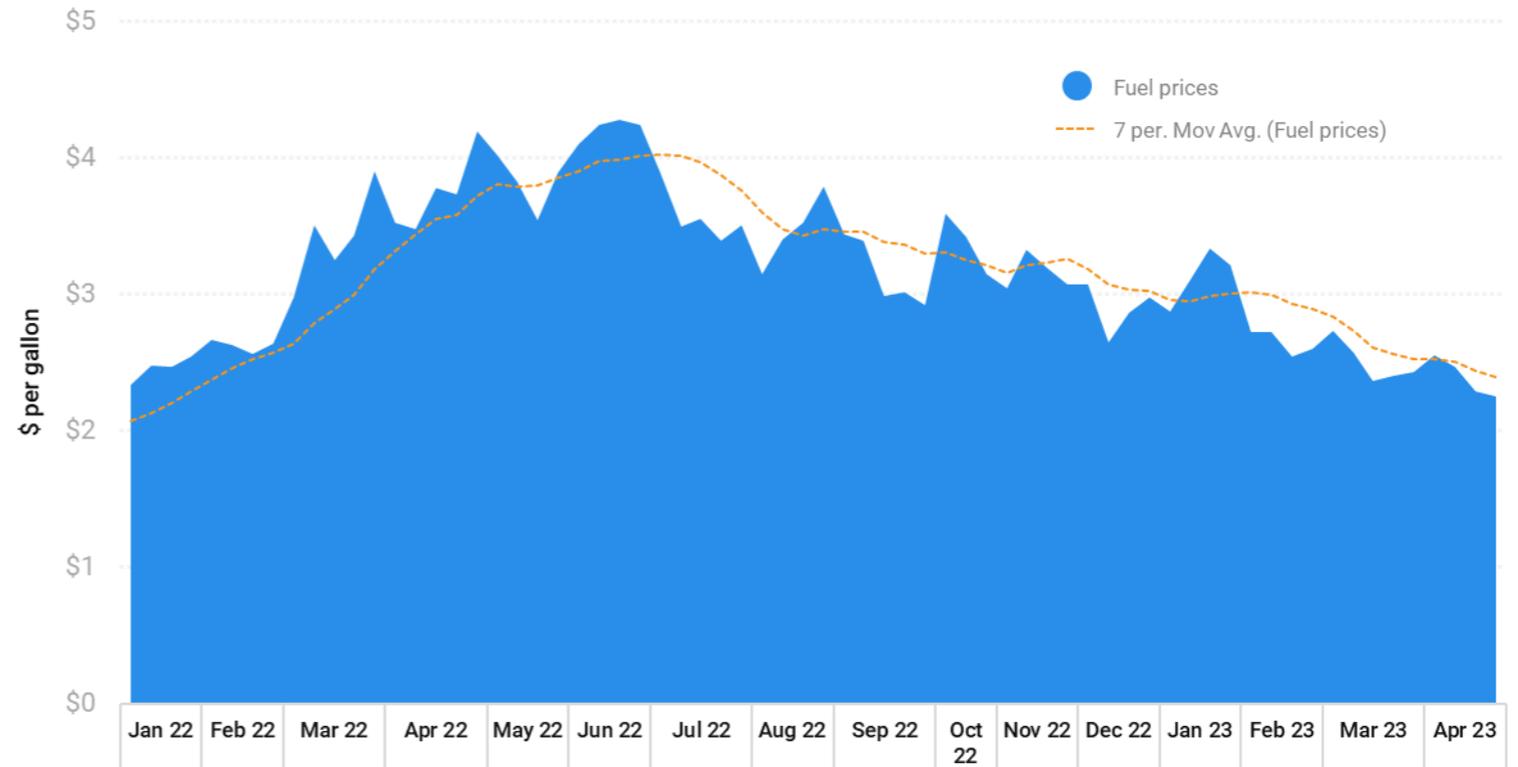
\$2.25 /gallon

-9%
vs. \$2.47 /gallon
on 14 Apr 2023

Source: IATA/Platts



Jet Fuel Price (Europe)

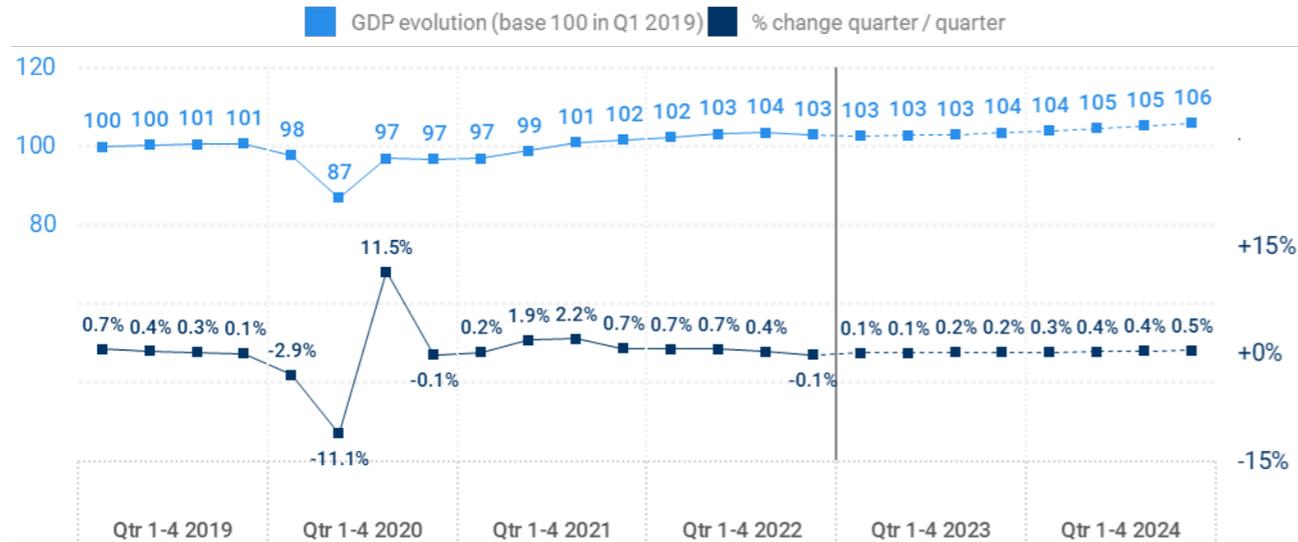


Source: IATA/Platts

- ➔ The average price of jet fuel increased to 2.25 USD/gallon on 28 April, it represents a drop of 13% compared to the end of February 2023 and a 21% 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 \$2.25/gallon end April 2023

GDP in the European Union

Constant prices and exchange rate, Euro

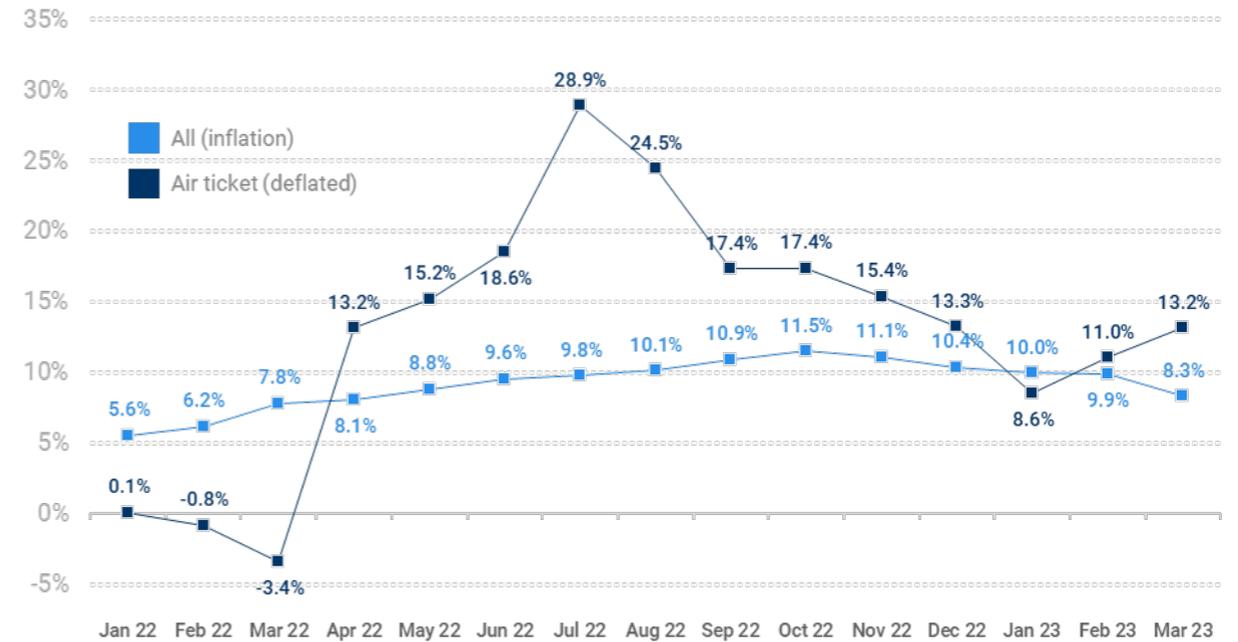


Source: Oxford Economics Ltd.

- ➔ 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

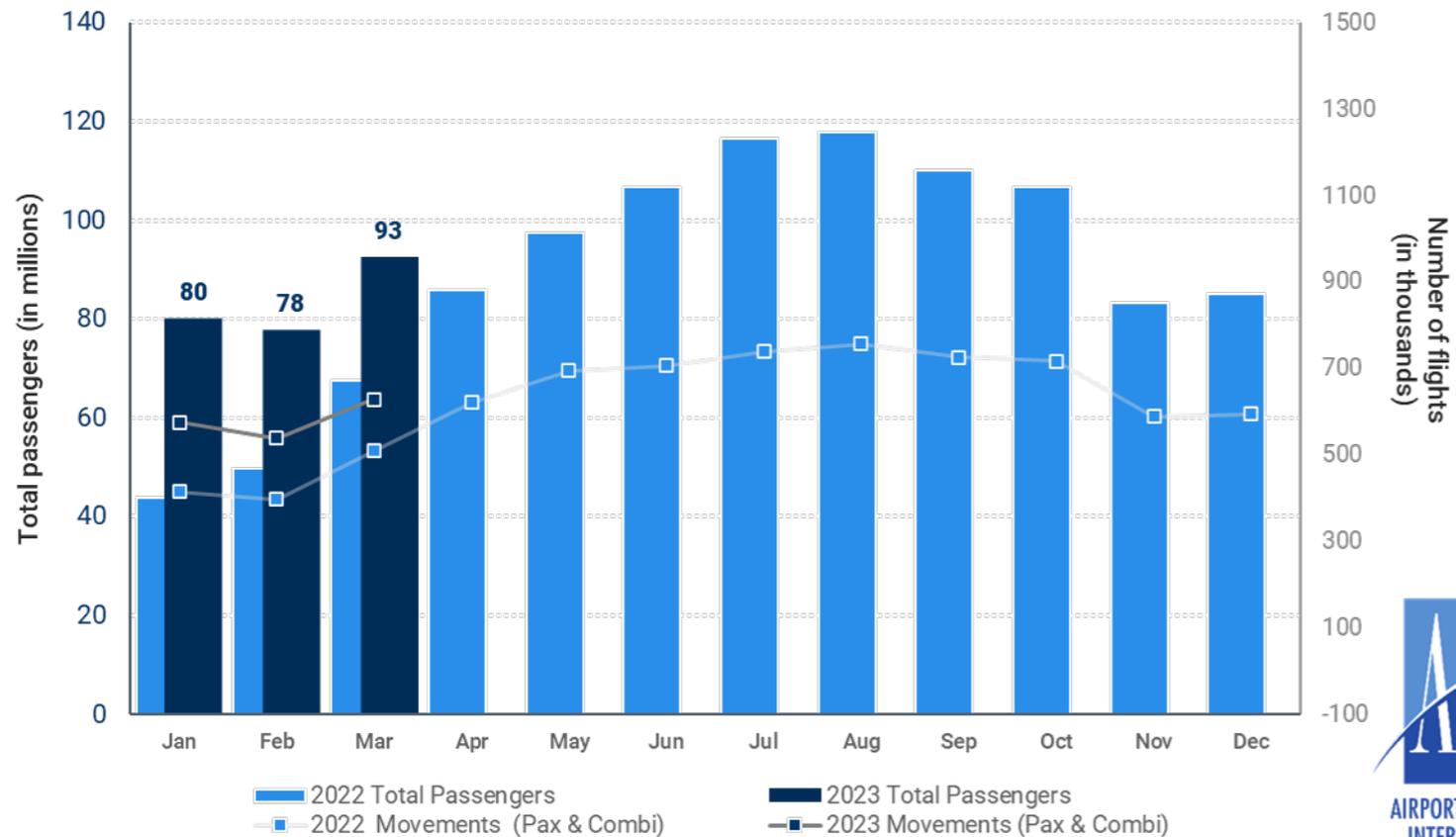
The latest information from EUROSTAT shows the following:

- ➔ In 2022, prices of air tickets increased by 16% compared to 2021 (peaking at +29% in July 2022).
- ➔ In March 2023, ticket prices continued to increase: 13% on March 2022, while all-prices inflation increased by ~8% only.
- ➔ 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



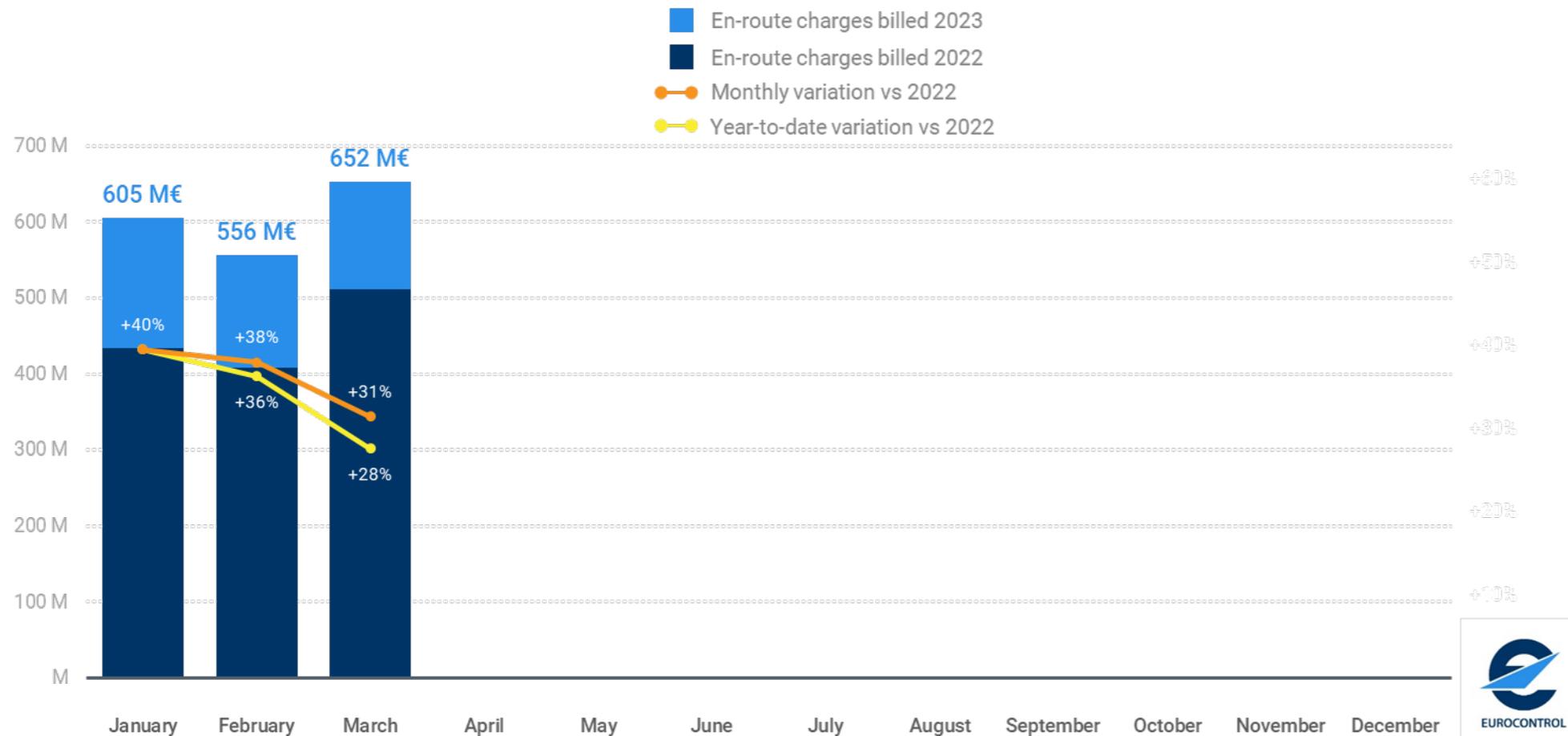
Based on ACI passenger data, the total number of passengers and corresponding aircraft movements for the Top 40* ECAC airports show:

- ✈ 93 million passengers were recorded in March 2023, corresponding to a 37% growth (vs March 2022), while corresponding movements increased by 23% over the same period.
- ✈ Both January and February 2022 were affected by omicron, hence the comparison is distorted.
- ✈ Passenger growth per day in between February and March 2023 (+19%) increased faster than movements growth per day (+16%), explained by the higher load factors recorded with the recovery from COVID-19 crisis.

* 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)



- At network level, 652M€ were billed in March which represents +28% vs 2022 and +12% 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 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 en-route charges.
- On a year-to-date basis, EUROCONTROL has billed 1,814 M€ which is +34% vs 2022

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