AVIATION INTELLIGENCE+

EUROCONTROL

EUROPEAN AVIATION OVERVIEW

24-30 May 2023

Thursday 1 June 2023

Headlines

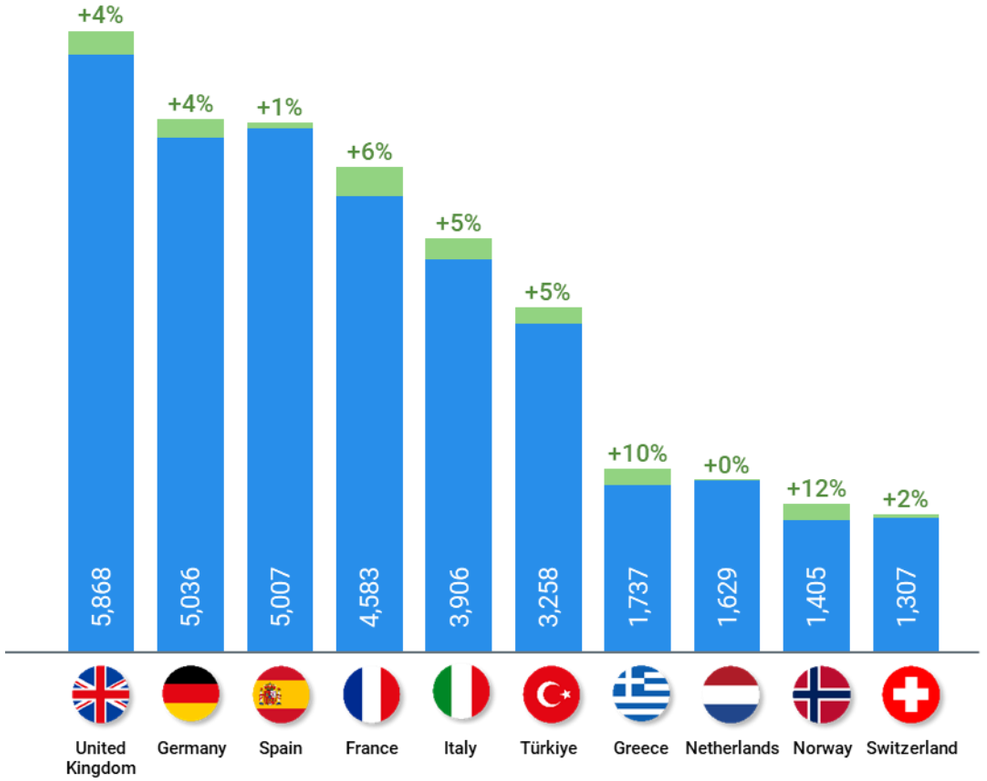
(Week 24-30 May 2023)

- The Network recorded 30,231 average daily flights (+6% vs 2022), increasing (+4%) vs the previous week and standing at 93% of 2019 levels.
- The operators continue to expand their capacities slowly but surely. Friday, the 26th of May, recorded the 4th busiest day (32,111 flights) since the beginning of the COVID-19 outbreak, earlier than in 2022.
- For May, the number of flights in the Network was 92% of the 2019 levels, spot on the base scenario of the flight forecast (released in December 2022).
- There were no ATFM delays arising from French industrial action during this week. However, arrival and departure punctuality were poor last week, closing 12 and 13 percentage points (respectively) below 2019, owing to capacity, staffing and weather issues, mainly in France, Germany and Greece.
- The Jet fuel price closed at 2.19 USD/gallon on 29 May, stable (+1%) on last edition.
- The air ticket prices continue to increase (+14%) in April 2023 (vs April 2022) while all-prices inflation increased by 8% only (stable over the last two months).

Top 10 Busiest States

On week 24-30 May 2023

(all flights incl. overflights compared with previous week)



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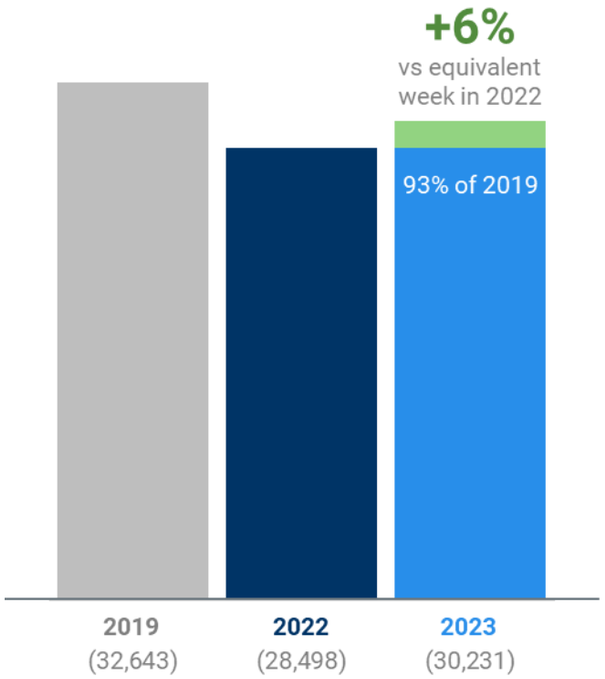
Traffic Situation

Average daily flights (including overflights)

Week 24-30 May 2023



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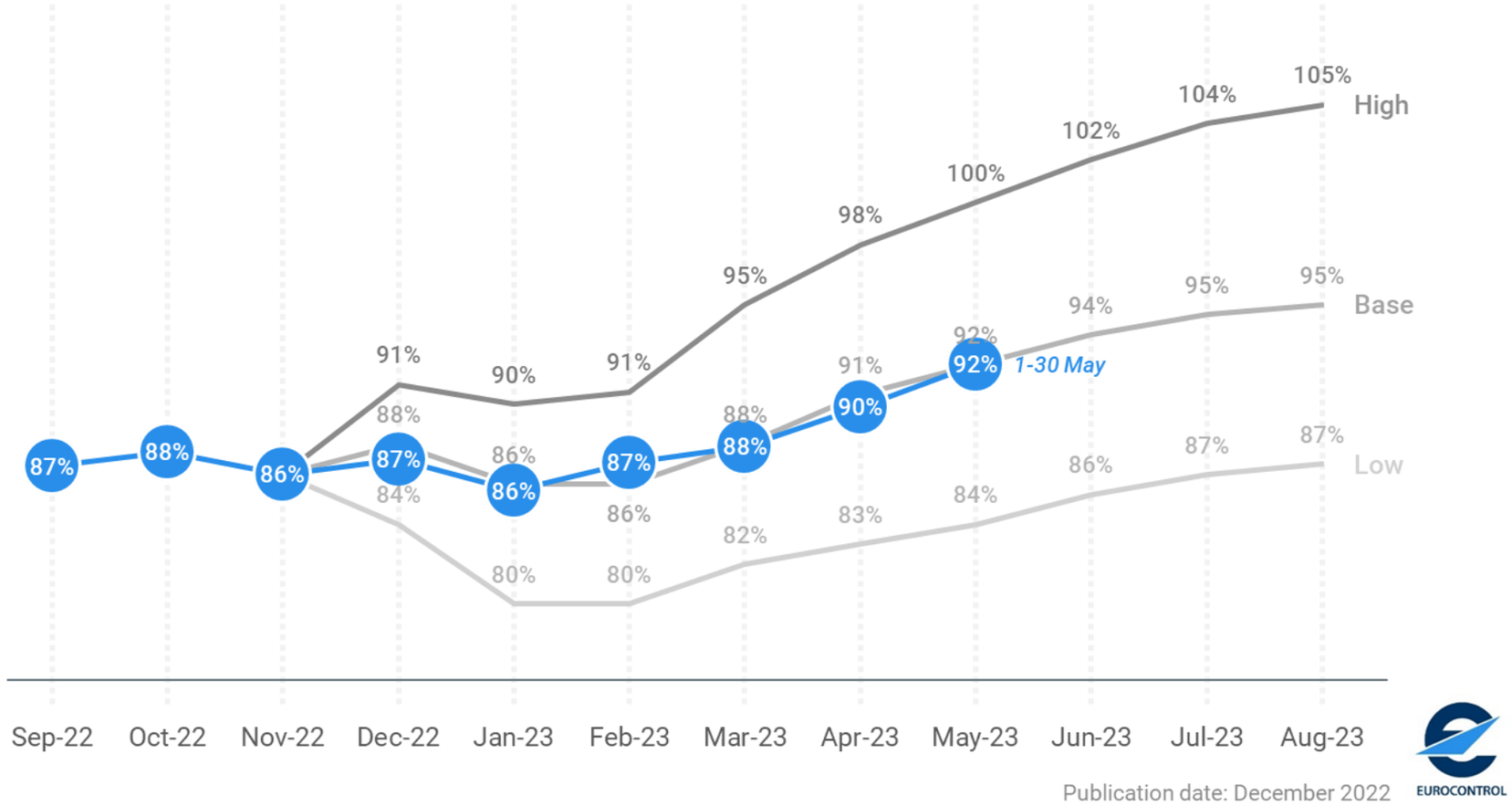
Overall Situation Compared to the EUROCONTROL Traffic Scenarios

(base year 2019)



Publication date: December 2022

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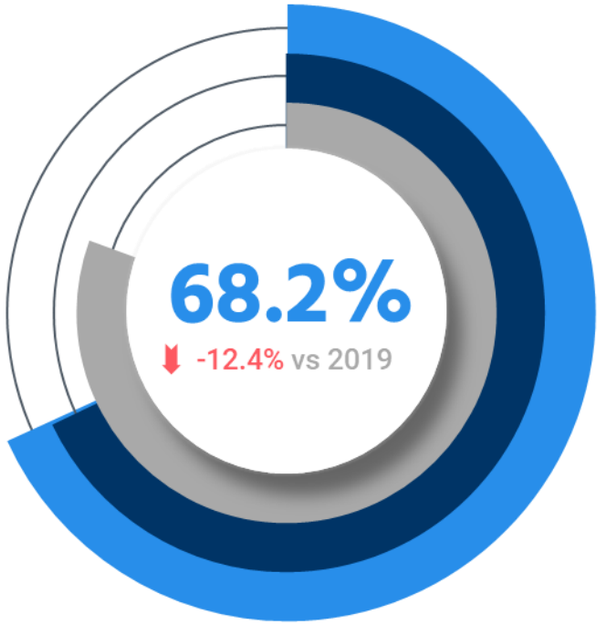
- The latest EUROCONTROL Traffic scenarios were published on 16 December 2022.
- Since that date, network traffic has evolved around the base scenario.
- For May 2023, flights were at 92% of May 2019 levels in line with our base scenario (92%).
- On a year-to-date basis, network traffic is at 89% of 2019 and +15% vs 2022

Arrival & Departure Punctuality

(at top airports for the last week)

Week 23-29 May 2023

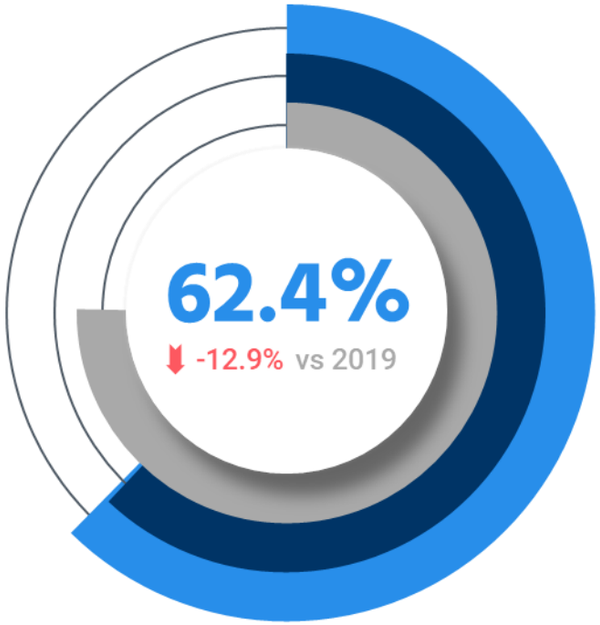
ARRIVAL PUNCTUALITY



80.6% _____ in 2019

67.9% _____ in 2022

DEPARTURE PUNCTUALITY



75.3% _____ in 2019

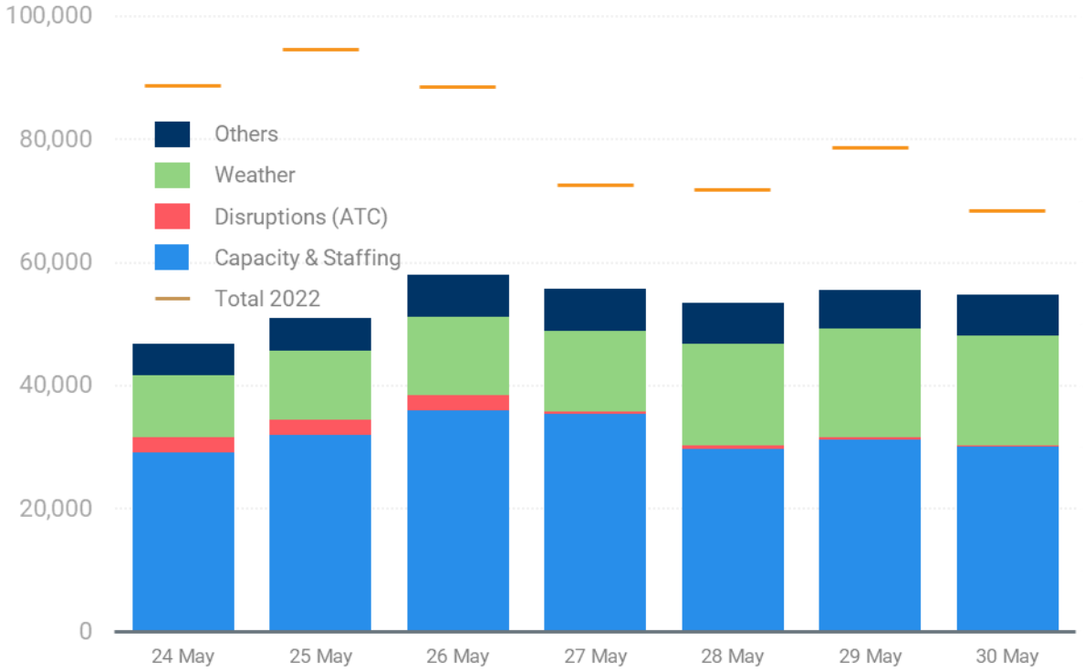
62.0% _____ in 2022

- Over the last week, network punctuality for arrivals and departures was 12.4 and 12.9 percentage points respectively lower than in 2019, they were however stable when compared to the levels of 2022.
- The Paris ACC industrial action (pension law reform) has now ended. However some ATC capacity delays were recorded in France. Elsewhere in the network, Greece saw heavy en-route delays for ATC staffing, as well as Athens airport seeing delays due to ATC equipment (radar issues). Seasonal weather, mainly thunderstorms also impacted the network throughout the week.
- Regarding airports, Amsterdam Schiphol saw delays due to weather, mainly due to unfavorable wind direction. Work in progress on runway 07L/25R caused delay at Frankfurt Main, Copenhagen continues to suffer from ATC staffing delays. Aerodrome capacity delays were recorded in Antalya. UK airports suffered from failures to their e-gates at passport control on 27 May.

En-Route ATFM Delays

Delays per cause (EUROCONTROL Area)

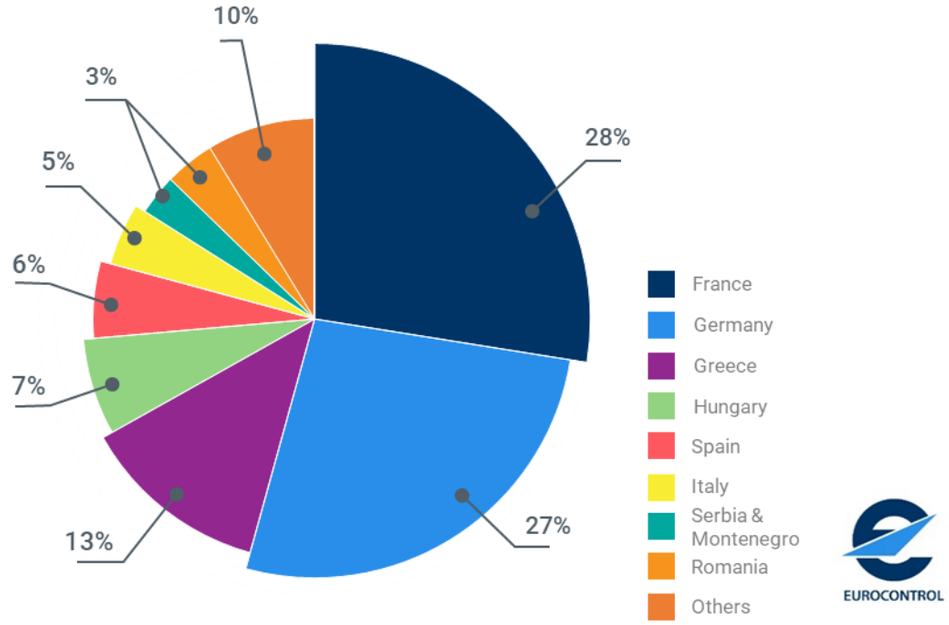
In minutes (7-day average) in 2023



- Based on a rolling week average, en-route ATFM delays have been constantly below 2022 levels, despite the 6% additional flights.
- Since the 23rd of May, ATC industrial action in France previously taking place every Wednesday and Saturday (Paris ACC) have been cancelled.
- Last week, en-route ATFM delays were just below 54,000 minutes per day, mostly due to capacity & staffing as well as weather issues.

Share of en-route ATFM delays

Week 24-30 May 2023



- France accounted for 28% of all en-route ATFM delays over the last week, mainly concentrated in Marseille and Reims ACCs.
- Germany came second with 27% of all en-route ATFM delays, mainly concentrated in Karlsruhe and Munich ACCs.
- Greece came third with 13% of all en-route ATFM delays.

Top 10 Countries

Departures and Arrivals

Week 24-30 May 2023

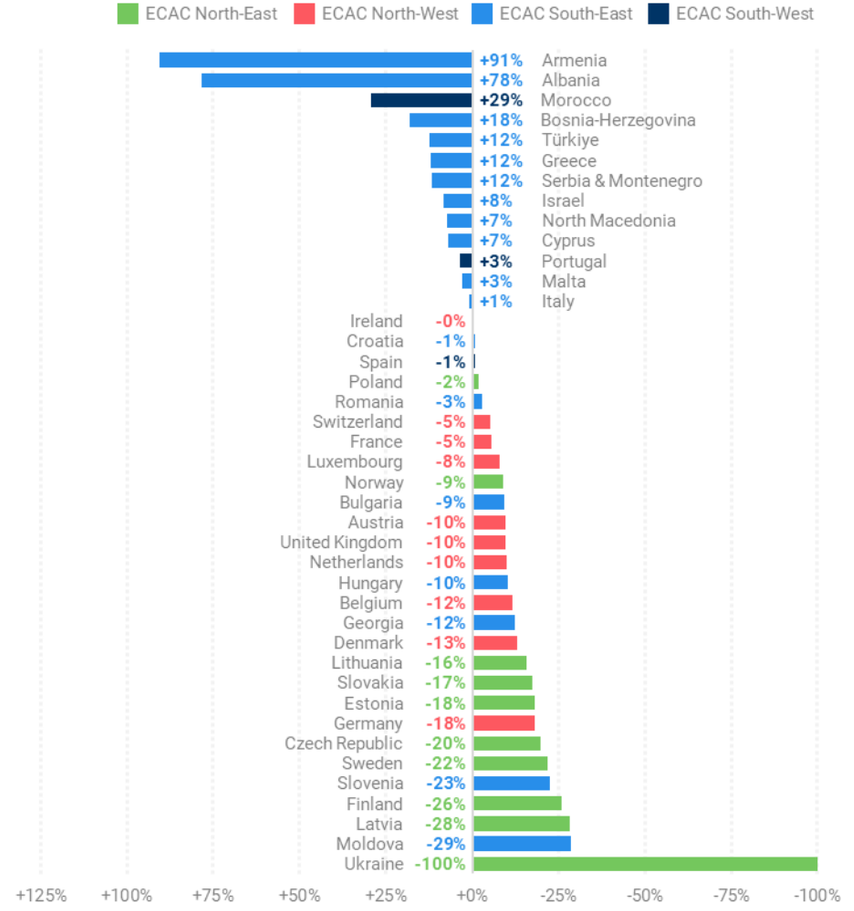
No.	Country	Average daily flights	% prev week	% prev year	% 2019
1.	United Kingdom	5,868	+4%	+4%	-10%
2.	Germany	5,036	+4%	+3%	-18%
3.	Spain	5,007	+1%	+3%	-1%
4.	France	4,583	+6%	+1%	-5%
5.	Italy	3,906	+5%	+6%	+1%
6.	Türkiye	3,258	+5%	+16%	+12%
7.	Greece	1,737	+10%	+6%	+12%
8.	Netherlands	1,629	+0%	+0%	-10%
9.	Norway	1,405	+12%	+2%	-9%
10.	Switzerland	1,307	+2%	+2%	-5%

- The top 10 States recorded higher number of flights (+4.3%) than in the previous week.
- Compared to the previous edition: Greece and the Netherlands swapped places.
- Greece continued to record a sustained growth rate of 10% (vs previous week), owing to increases from light aircraft operators, TUI, Jet2 and Volotea. Norway posted a 12% increase due to Widerøe, SAS and Norwegian.
- Three States within the top 10, have recorded growth above 2019 (Italy, Türkiye and Greece) over last week. Spain, France and Switzerland are close to the pre-COVID levels.

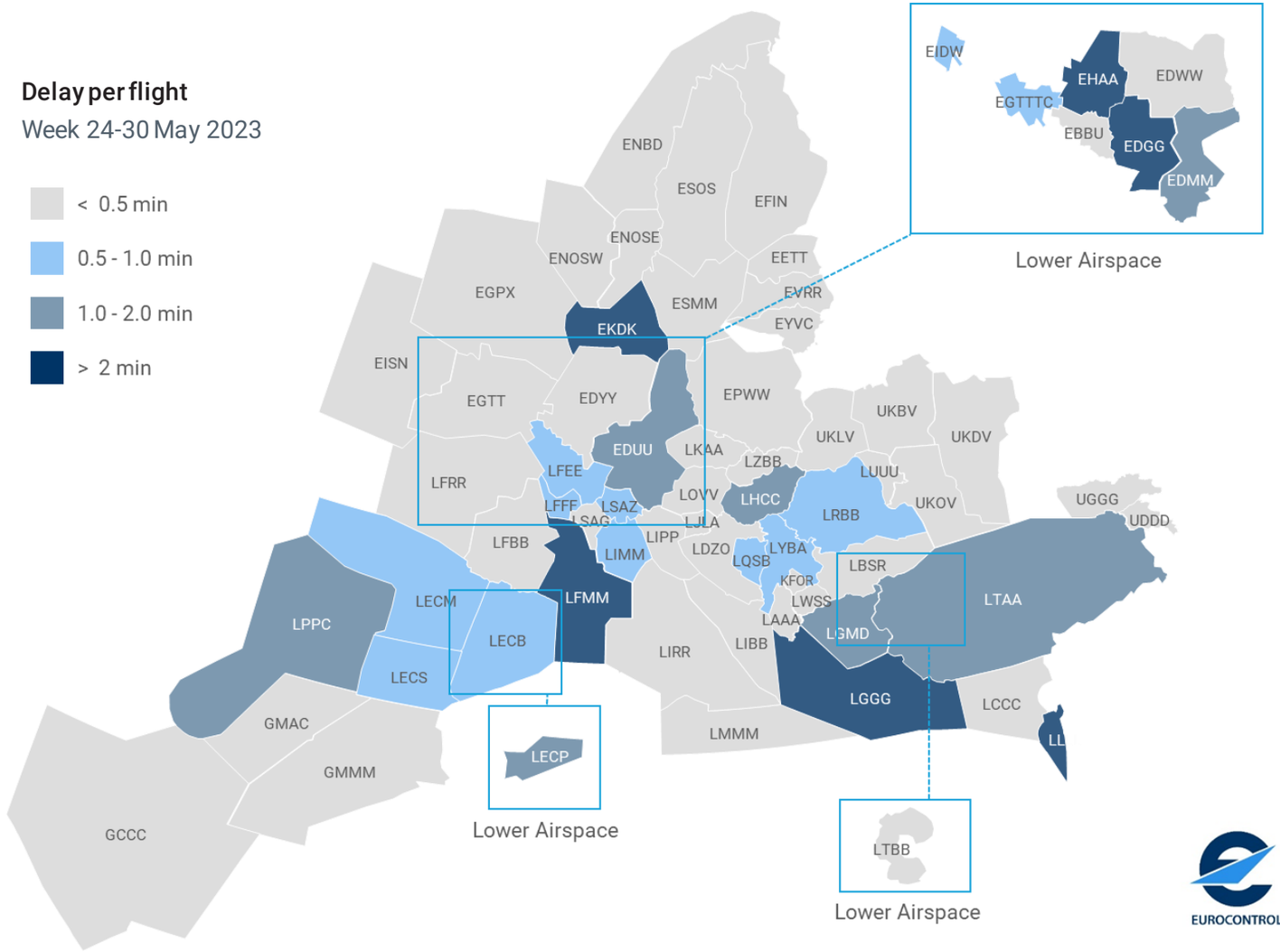
States in the EUROCONTROL Network

Compared to the equivalent week in 2019

Dep/Arr flights for week 24-30 May 2023



En-Route ATFM delayed flight per Area Control Centre



- Over the last week, en-route ATFM delays have slightly increased compared to the week before (54,000 minutes per day, on average) but traffic levels are higher too.
- Compared to the same week in 2022, En-Route ATFM delays were 33% lower this year (last year, there were delays related to capacity, weather and disruptions issues).
- There were infrastructure issues in Greece and staffing issues in Copenhagen.
- Last week, the most affected ACCs were Amsterdam (4.9 min/flight), Copenhagen (3.5), Athens (3.5), Tel Aviv (22.9), Langen (2.7) and Marseille (2.7).
- Overall, France was responsible for 28% of all en-route ATFM delays last week, followed by Germany (27%) and Greece (13%).

Top 10 Aircraft Operators

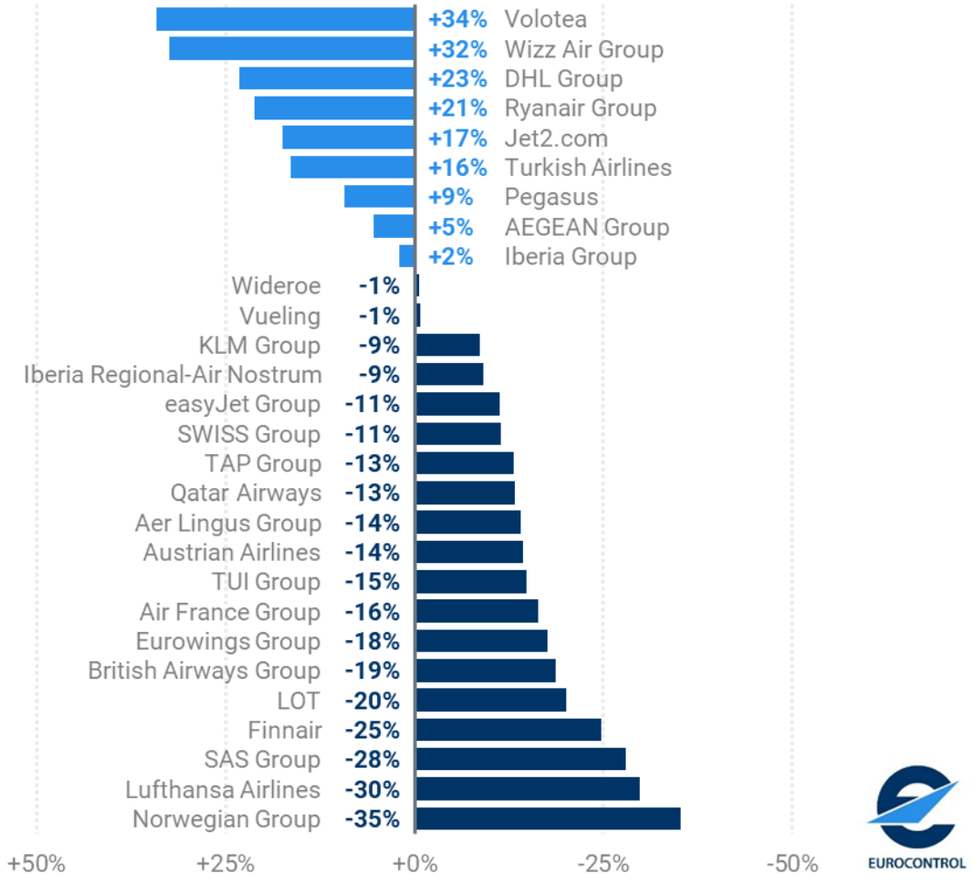
Week 24-30 May 2023 (avg daily flights)

No.	Aircraft operator	Average daily flights	% prev week	% prev year	% 2019
1.	Ryanair Group	3,083	+1%	+7%	+21%
2.	easyJet Group	1,633	-1%	+3%	-11%
3.	Turkish Airlines	1,530	+2%	+14%	+16%
4.	Lufthansa Airlines	1,143	+2%	-7%	-30%
5.	Air France Group	1,071	+1%	+4%	-16%
6.	KLM Group	859	+0%	+7%	-9%
7.	Wizz Air Group	807	+1%	+8%	+32%
8.	British Airways Group	793	-2%	+8%	-19%
9.	SAS Group	678	+13%	+16%	-28%
10.	Vueling	642	+0%	+4%	-1%

- The top 10 aircraft operators recorded a slightly higher number of flights (+1.3%) on the previous week.
- Last week, SAS posted a double-digit growth (+13%) on previous week, owing to increases on domestic flows in Norway and Sweden.
- Turkish Airlines and Lufthansa recorded a 2% growth (each) on the week before. There were more flights on the domestic flows in Türkiye (operated by Turkish) and on flows Germany ↔ Italy and Germany ↔ Spain or domestic Germany (Lufthansa).
- Three airlines within the top 10 surpassed their 2019 flight levels: Wizz Air (+32%), Ryanair (+21%) and Turkish Airlines (+16%). Vueling is close to the pre-COVID levels (-1%).

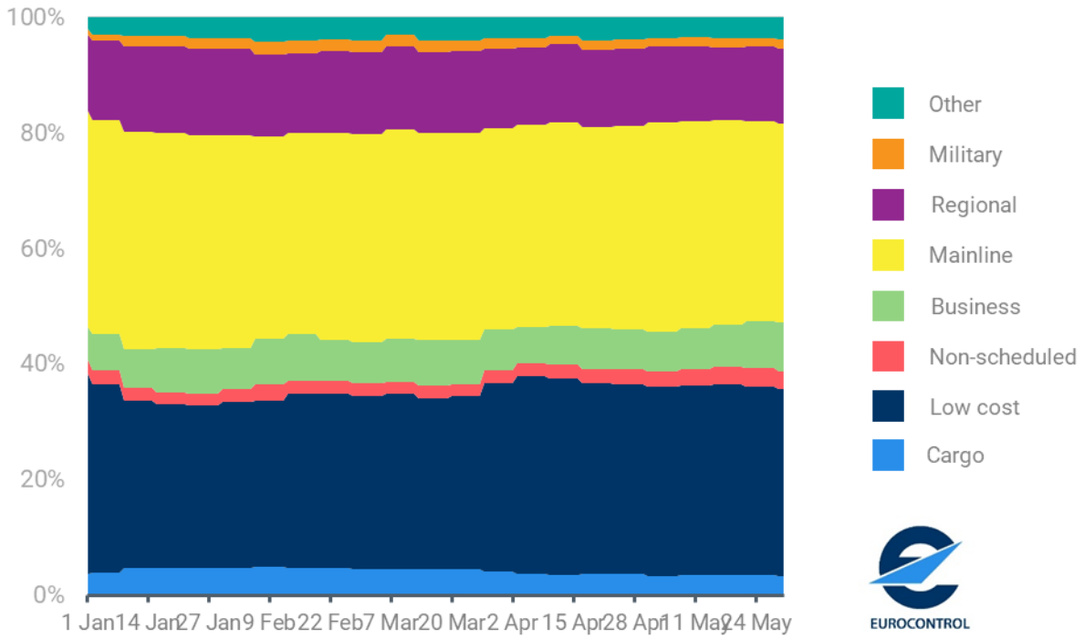
Aircraft Operators in the EUROCONTROL Network

Compared to the equivalent week in 2019
Dep/Arr flights for week 24-30 May 2023

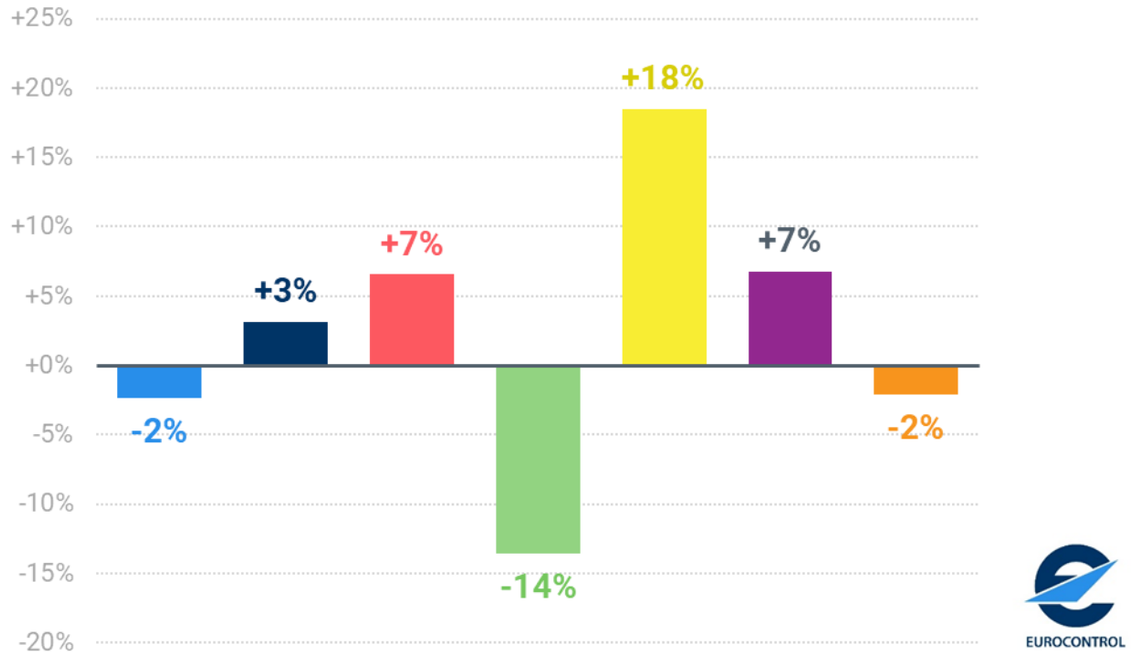


Market Segments in the EUROCONTROL Network

7-day average share of total flights



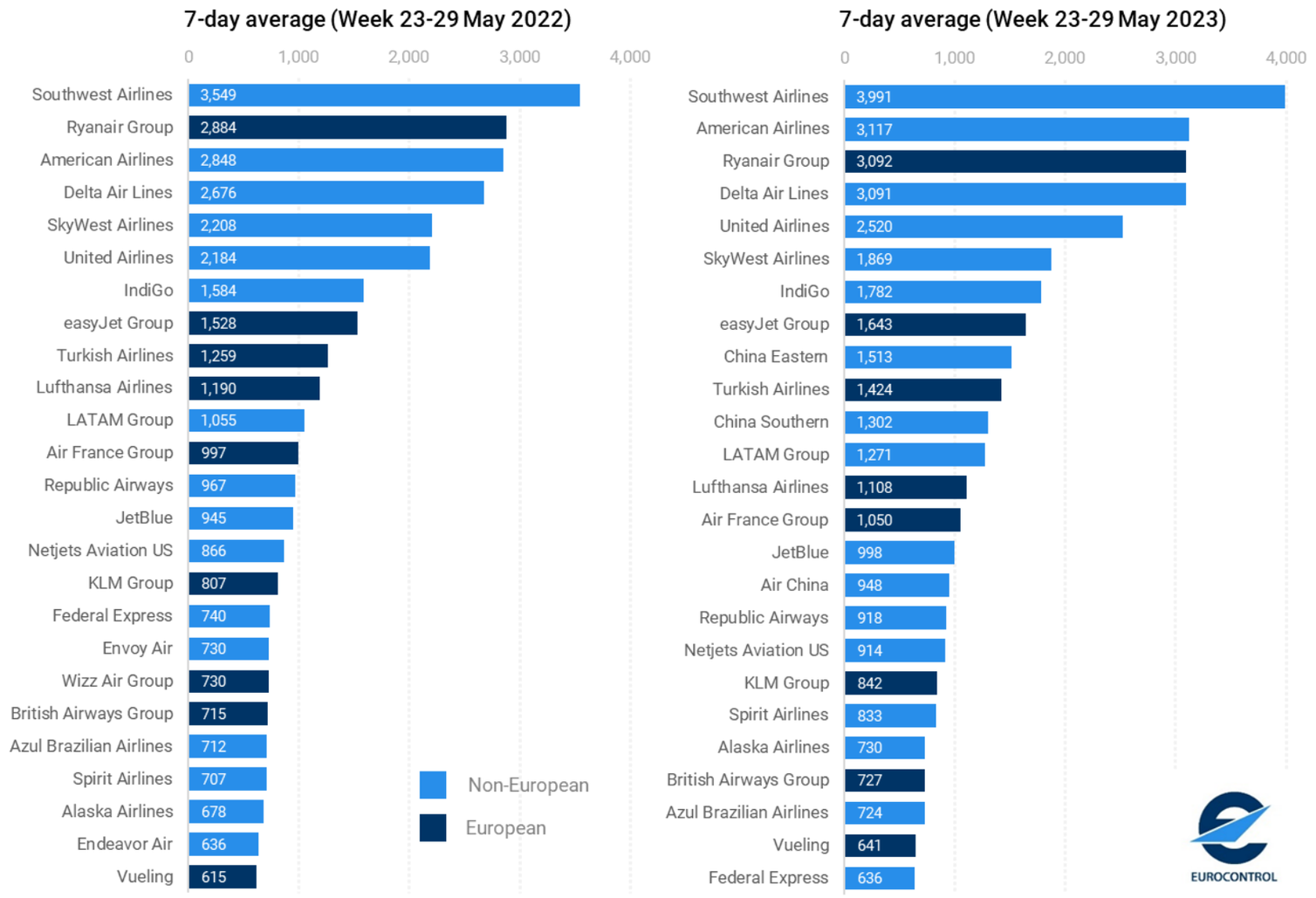
Week 24-30 May 2023 (vs 2022)



- Compared to 2022, Mainline (+18%), Regional (+7%), Charter (+7%) and Low-Cost (+3%) are recording growth compared to last year owing to the continuing recovery after the COVID-19 outbreak (pent-up demand).
- Business Aviation (-14%) and All-Cargo (-2%) are now recording fewer flights in 2023 compared to 2022 levels. All-Cargo market share has now stabilized (representing a market share of 3.4% of all flights in May 2023 vs 3.8% in May 2022) 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 (7.4% of the total flights in May 2023 compared to 8.9% in May 2022) is levelling off too as the commercial airline activity (mainline, regional, low-cost) has now almost closed the gap between 2023 and 2019.
- Charter (+2%), accounting for a 2.9% market share of all flights in May 2023 (vs 3.1% in May 2022), records slightly more flights, owing to some increases on touristic flows with Croatia, Greece, Bulgaria, Romania, Hungary, Slovakia, Poland, Greece, Egypt (compared to May 2022).

Top 25 Global Aircraft Operators

(average daily departure flights)

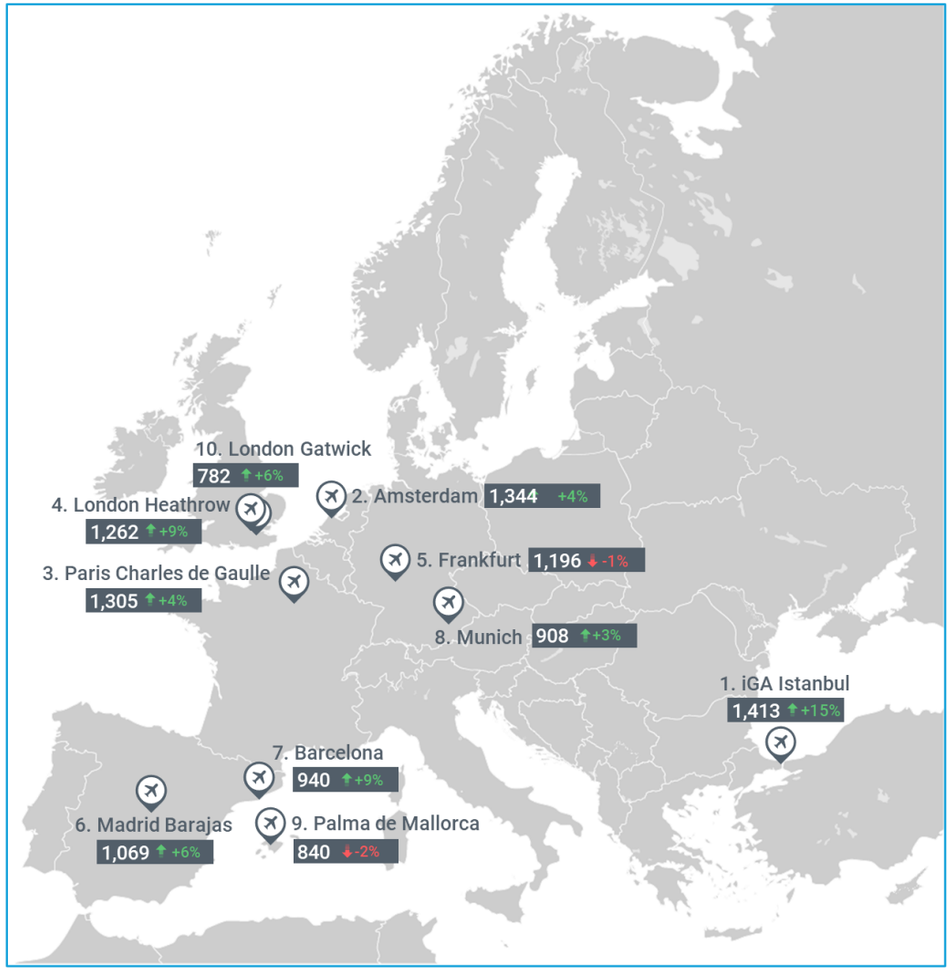


Source: Flightradar24 Historical Global Utilisation data

Over the last week:

- Eight European airlines are ranked in the Top 25 global aircraft operators (one less than in 2022).
- The first European aircraft operator (3rd) is Ryanair (rank one place higher 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 respectively ranked 21st and 22nd.
- Vueling (24th) is the last European airline in this ranking.
- Wizz Air is the only European airline that has slipped out of the top 25 since 2022.

Top 10 Airports



Airport Ranking

Week 24-30 May 2023 (vs 2019)

No.	Airport	Avg. daily dep/arr flights	vs 2022	vs 2019
1.	iGA Istanbul	1,413	+15%	+23%
2.	Amsterdam	1,344	+4%	-9%
3.	Paris Charles de Gaulle	1,305	+4%	-9%
4.	London Heathrow	1,262	+9%	-7%
5.	Frankfurt	1,196	-1%	-21%
6.	Madrid Barajas	1,069	+6%	-11%
7.	Barcelona	940	+9%	-7%
8.	Munich	908	+3%	-26%
9.	Palma de Mallorca	840	-2%	+9%
10.	London Gatwick	782	+6%	-10%

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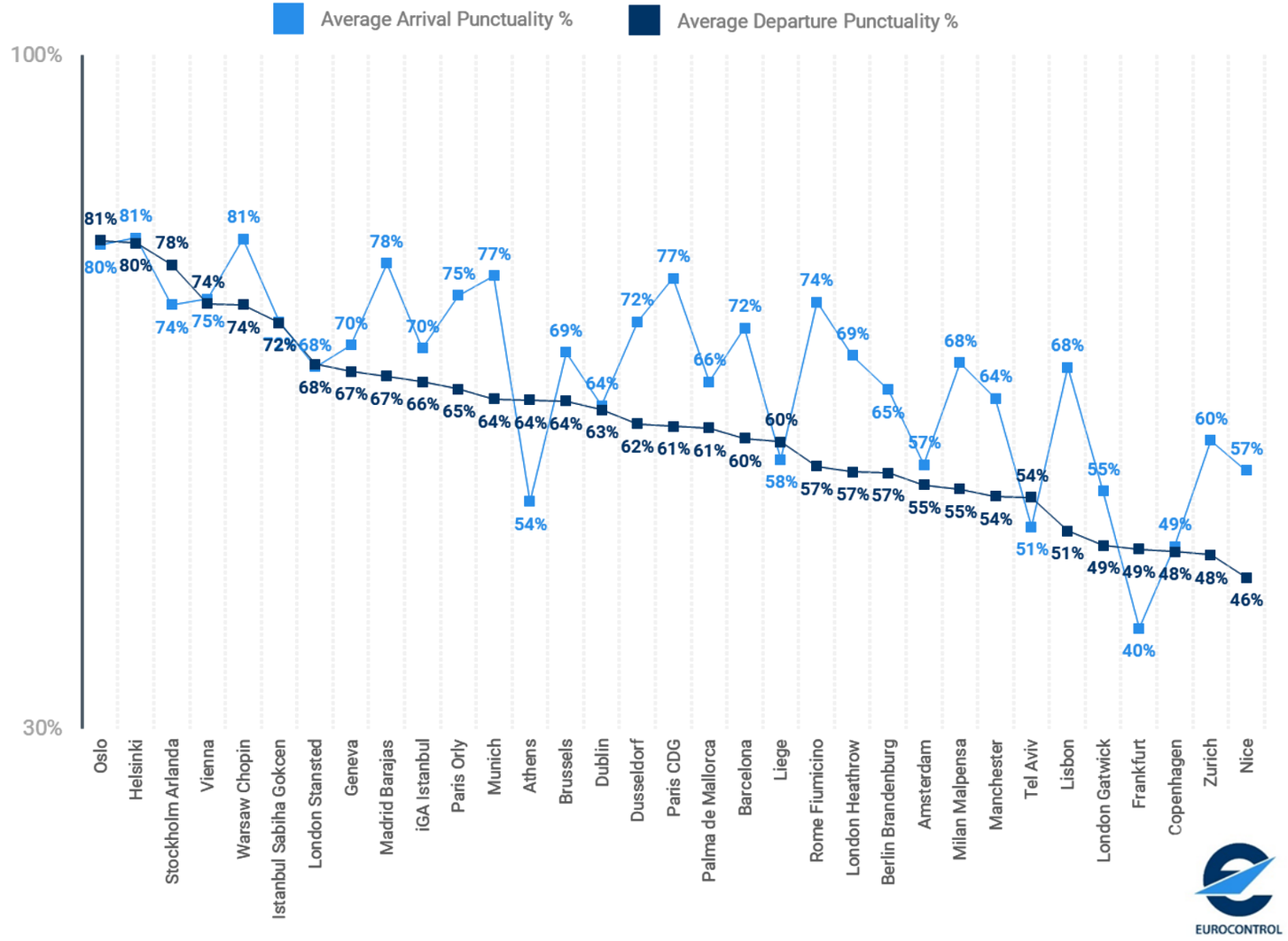
- No changes in the ranking compared to the previous edition.
- Almost all airports experienced sustained growth on 2022; ranging from +3% (Munich) to +15% (iGA Istanbul).
- Palma de Mallorca airport (-2% on 2022, same week) was affected by bad weather. Frankfurt (-1%) was affected by works on one of its four runways.
- 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

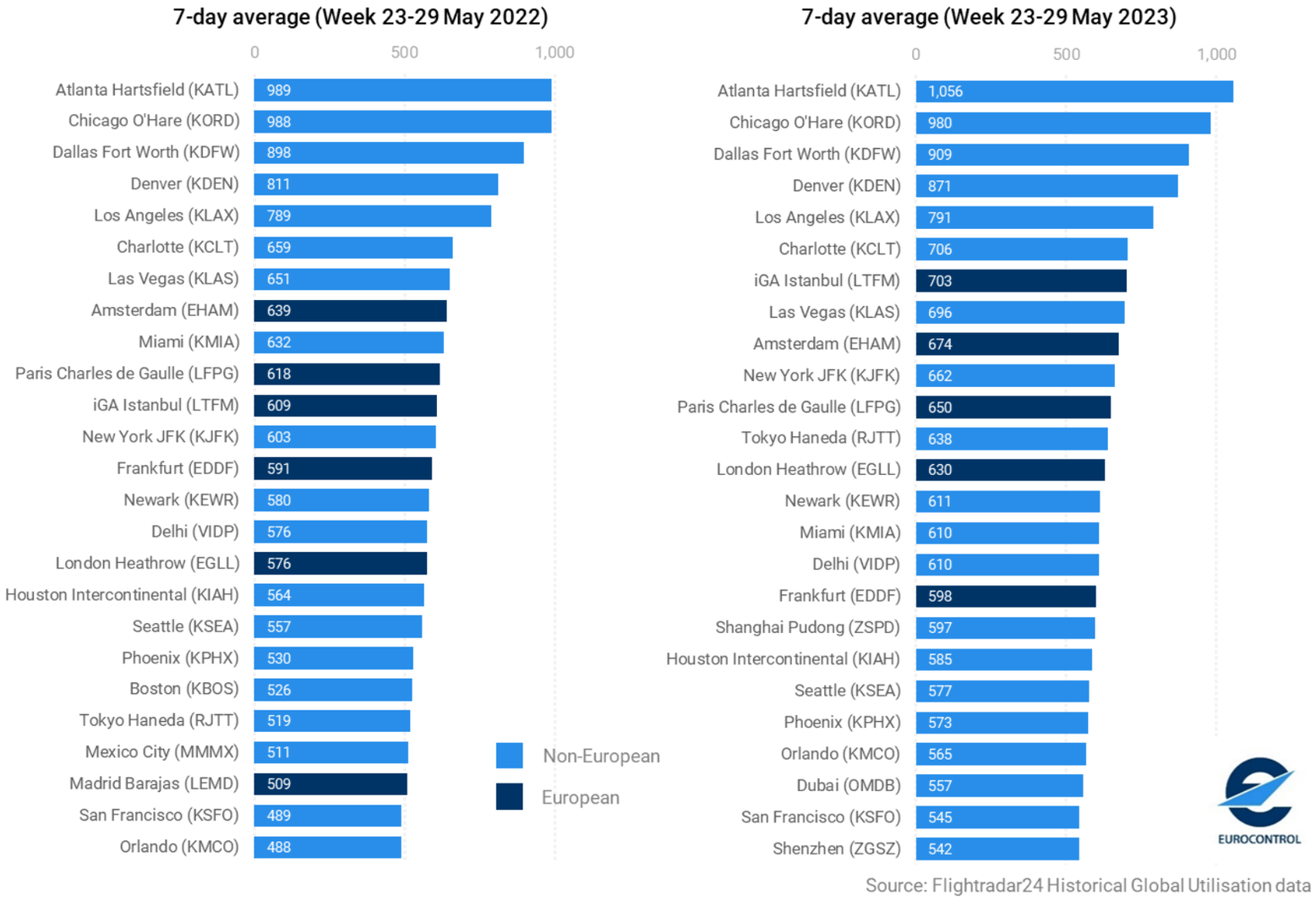
(Week 24-30 May 2023)



- 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 May and are still worse than in 2022.
- However a few airports, notably Stockholm, Athens, Liège, Tel Aviv, and Frankfurt 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)



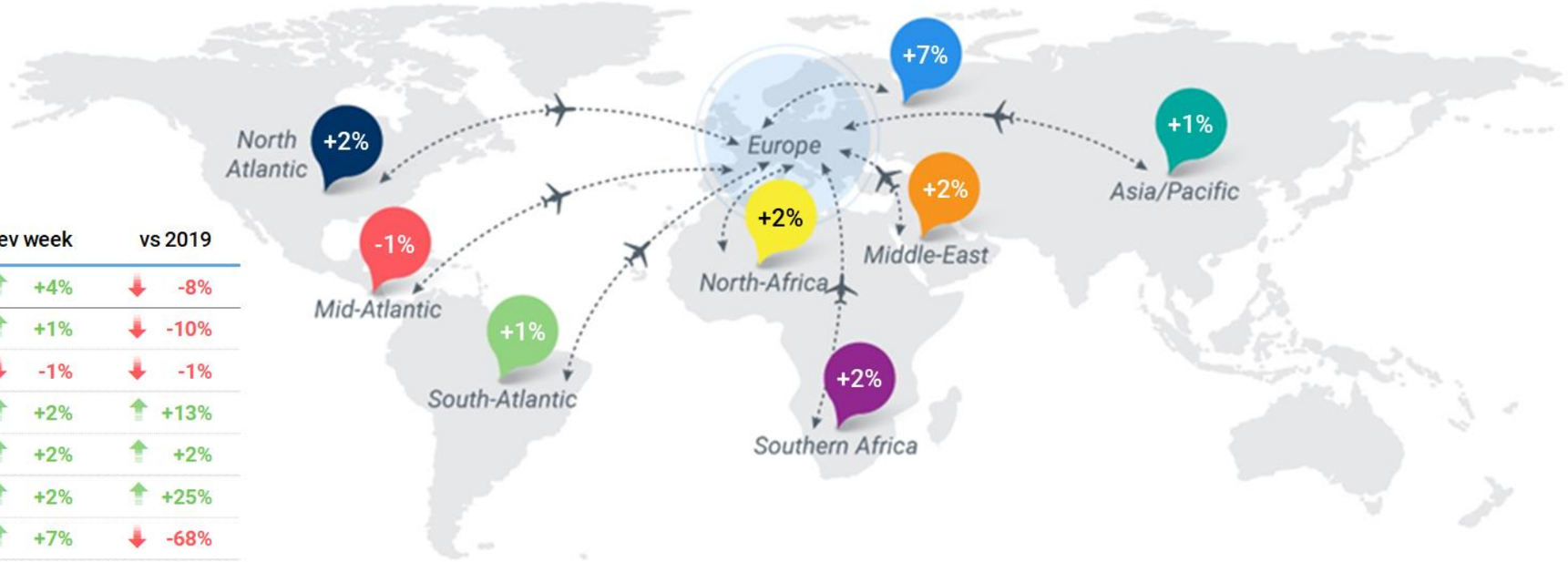
Source: Flightradar24 Historical Global Utilisation data

Over the last week

- Five European airports are ranked in the Top 25 of global airport departures (there were six in 2022).
- The first European airport (7th) is iGA Istanbul.
- The other European airports in the Top 25 are Amsterdam (9th), CDG (11th), Heathrow (13th) and Frankfurt (17th).
- Madrid is no longer present in this top 25.
- The first Chinese airport in 2023 is Shanghai (18th), when none was part of the Top 25 a year ago

Traffic Flows

(average daily departure/arrival flights for week 24-30 May 2023)



Region	Average daily flights	vs prev week	vs 2019
Intra-Europe	24,005	+4%	-8%
Europe ↔ Asia/Pacific	708	+1%	-10%
Europe ↔ Mid-Atlantic	147	-1%	-1%
Europe ↔ Middle-East	1,369	+2%	+13%
Europe ↔ North Atlantic	1,347	+2%	+2%
Europe ↔ North-Africa	1,061	+2%	+25%
Europe ↔ Other Europe	384	+7%	-68%
Europe ↔ South-Atlantic	168	+1%	-8%
Europe ↔ Southern Africa	270	+2%	-4%
Non Intra-Europe	5,454	+2%	-9%

- The main traffic flow was intra-European with 24,005 daily flights last week, higher (+4%) than in the previous week. Inter-Continental flows recorded 5,454 daily flights on average last week, +2% vs the previous week.
- The second regional flow is between Europe and the Middle-East with 1,369 average daily flights last week, showing a decrease of +2% vs the previous week.
- The third flow is with North America with 1,347 daily flights, slightly higher (+2%) than in the previous week.
- The fourth flow is with North Africa, with 1,061 flights per day, showing a +2% increase on previous week.
- Flows with Other Europe (incl. Russian Federation) are still lagging behind and were at -68% compared to 2019.
- Flows between Europe and Asia/Pacific are still lagging behind, to a lesser extent, at -10% compared to 2019, but strengthening week after week, driven by the re-opening of China.

Top 10 Long Haul Country-Pairs

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

Week 24-30 May 2023

No.	Country pair	Average daily flights	% prev week	% prev year	% 2019
1.	UK ↔ US	321	+0%	+14%	-1%
2.	Germany ↔ US	167	-0%	+0%	-0%
3.	France ↔ US	130	+4%	+7%	+4%
4.	Italy ↔ US	83	+10%	+18%	+2%
5.	Netherlands ↔ US	80	+2%	+0%	-6%
6.	Ireland ↔ US	71	+3%	+7%	+9%
7.	Spain ↔ US	66	-4%	+5%	-12%
8.	UAE ↔ UK	56	-1%	+27%	+22%
9.	Switzerland ↔ US	45	+4%	+19%	+8%
10.	Canada ↔ UK	40	+3%	-8%	-10%

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- A few changes in the ranking over the previous week for the top 10 Long-haul Country-Pairs: Italy ↔ US and Netherlands ↔ US swapped places. The same happened to Ireland ↔ US and Spain ↔ US (compared to the previous edition). India ↔ UK exited the top 10 while Canada ↔ UK entered it.
- All but two of the flows posted an increase (or remained stable) on previous week (ranging from 0% to 10%). Italy ↔ US recorded a 10% increase owing to United and Delta Airlines on flows connecting Rome and New York & San Francisco.
- 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 but one flows posted an increase on 2022 (same week).
- Half of the flows were above 2019 levels over the previous week.

Economics

Week 24-30 May 2023

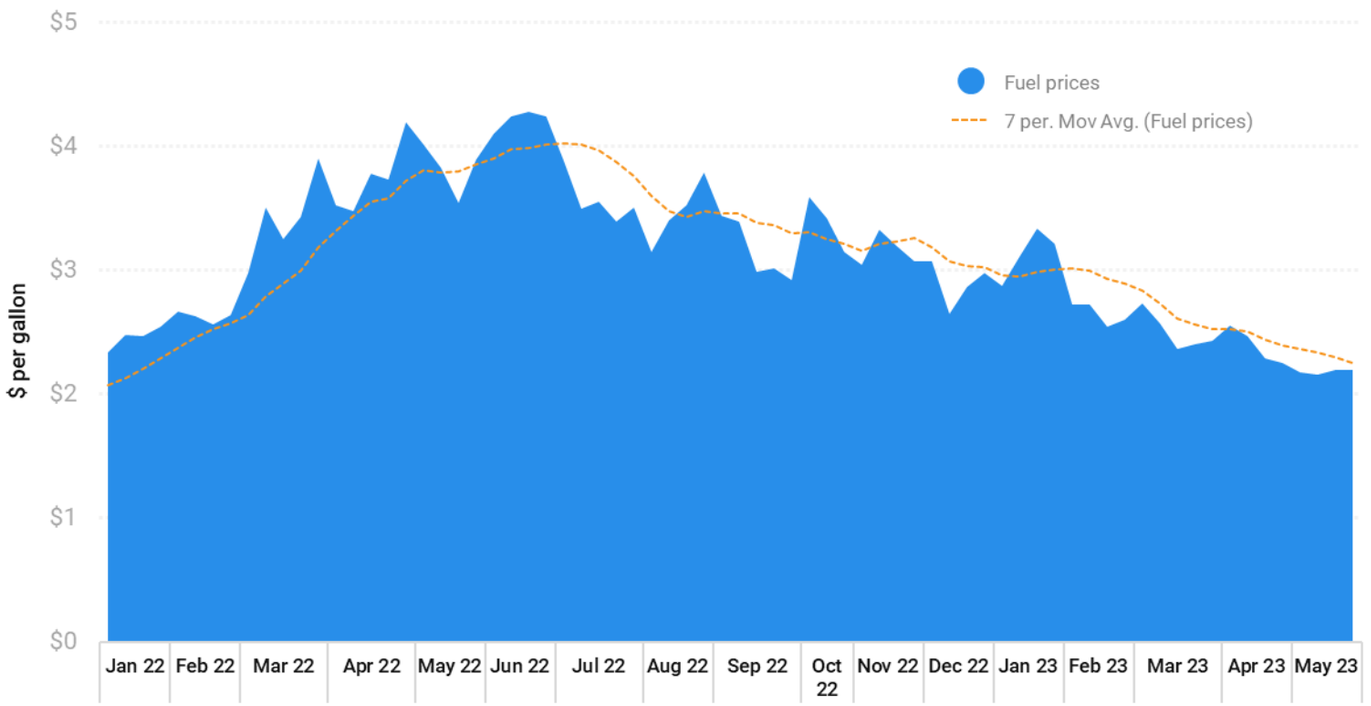
29 May 2023
avg fuel price:

$2.19 /gallon

1%
vs. $2.16 /gallon
on 12 May 2023

Source: IATA/Platts

Jet Fuel Price (Europe)

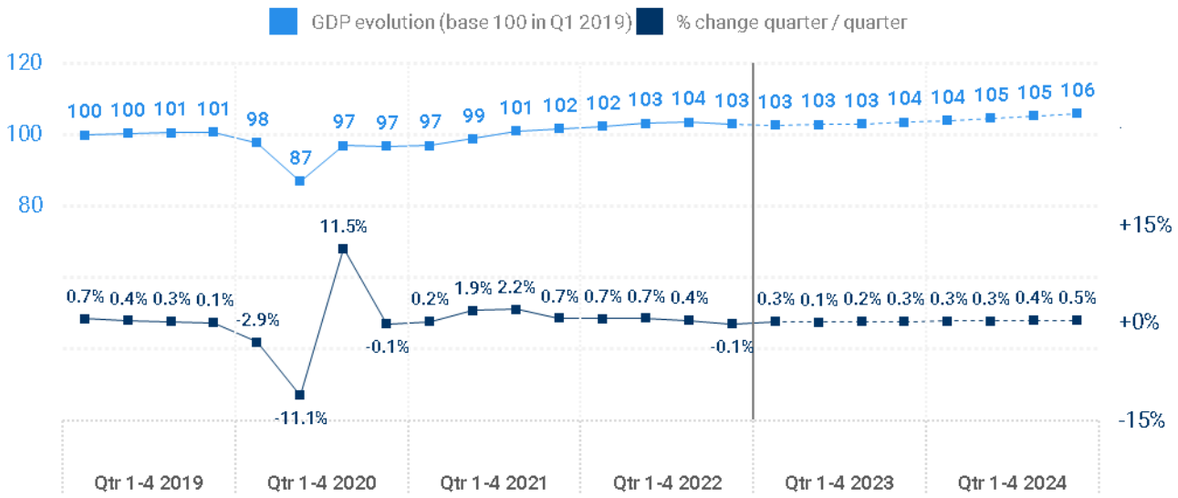


Source: IATA/Platts

- The average price of jet fuel increased to 2.19 USD/gallon on 29 May, stable (+1%) compared to the previous edition. Prices recorded a 24% drop compared to the beginning of 2023.
- Based on a moving average trend, fuel prices in Europe have almost halved in one year, from $4/gallon in June 2022 down to $2.19/gallon at the end of May 2023

GDP in the European Union

Constant prices and exchange rate, Euro

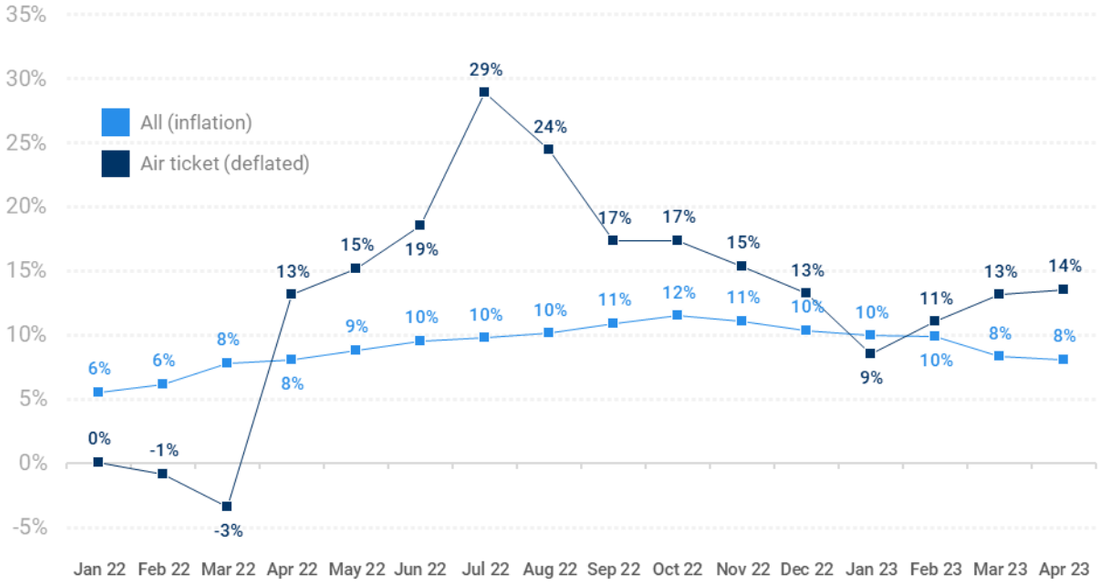


Source: Oxford Economics Ltd.

- According to the latest GDP forecast from Oxford Economics, EU27 economies have posted a positive growth during Q1 2023 (+0.3% 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



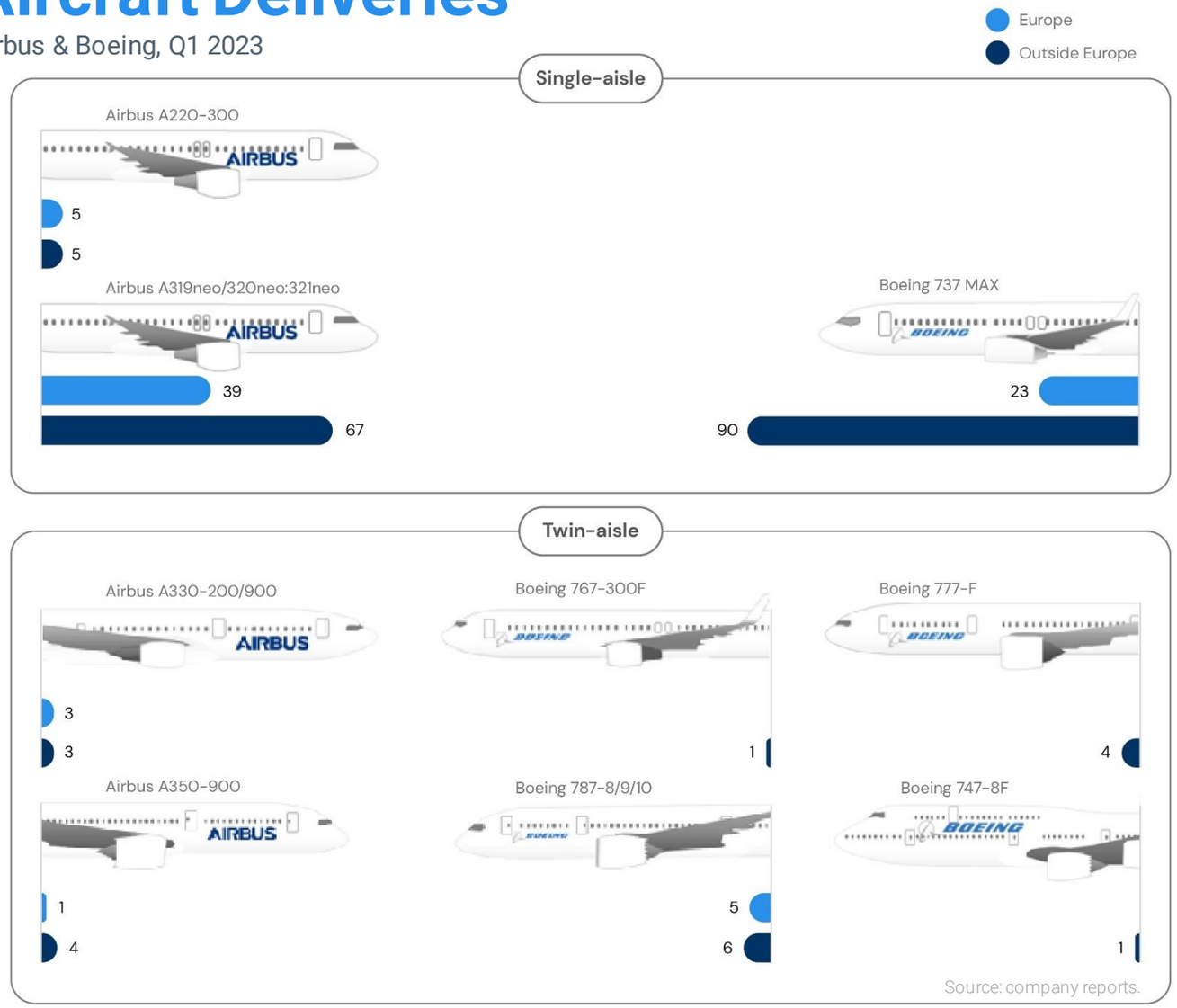
Source: EUROSTAT

The latest information from EUROSTAT show the following:

- In April 2023, ticket prices continued to increase: +14% on April 2022, while all-prices inflation increased by ~8% only (stable over the last two months).
- This reflects inter alia sustained demand, reduced flight choice and higher jet fuel prices.

Aircraft Deliveries

Airbus & Boeing, Q1 2023

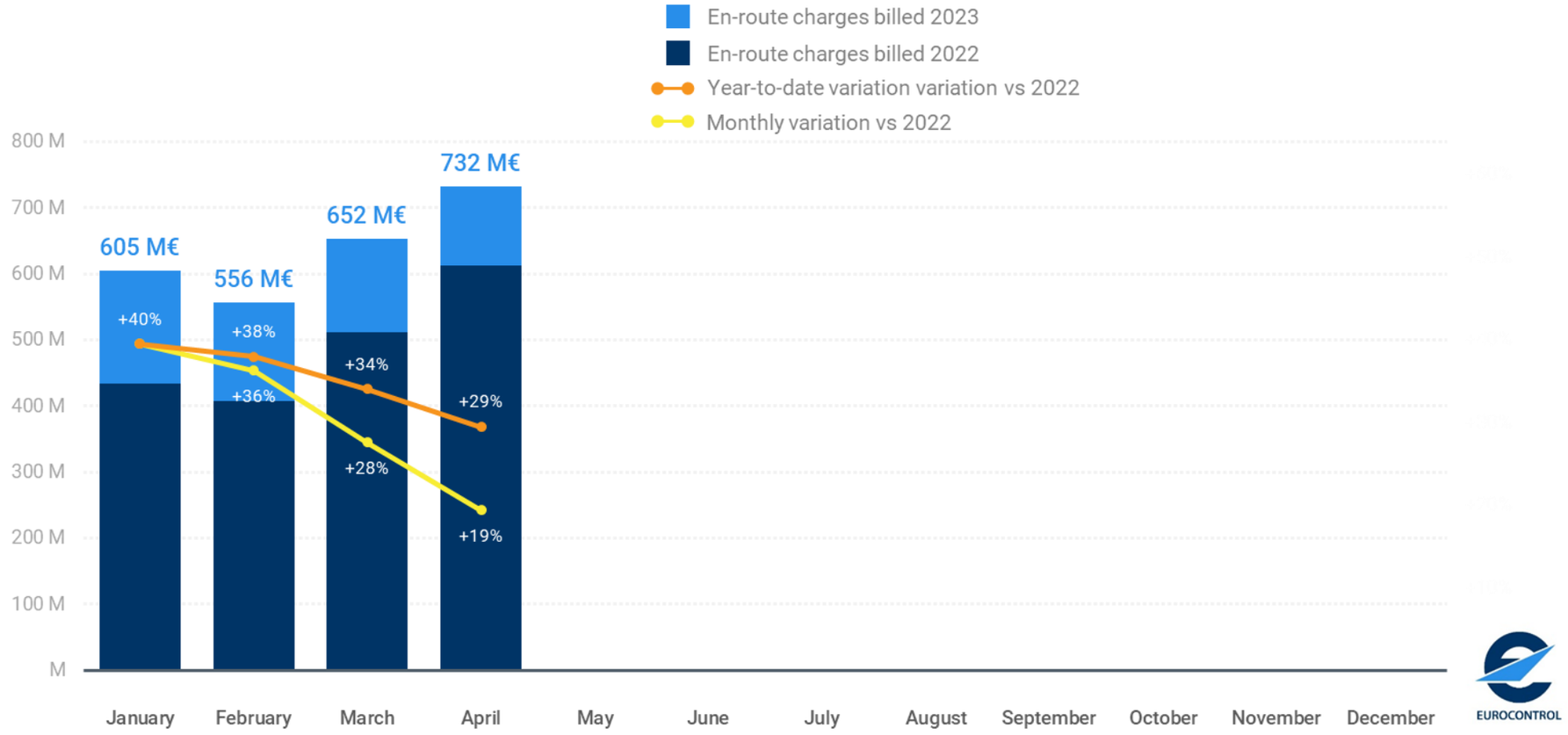


For the first quarter in 2023

- Boeing delivered three more aircraft (130, +2%) than Airbus (127).
- Narrow-bodies aircraft dominated Airbus's and Boeing's deliveries during the first quarter of 2023.
- Airbus delivered 48 aircraft (38% share of the Q1 2023 deliveries) to European market whereas Boeing delivered 28 aircraft (22% share) to Europe.
- Airbus delivered 34 aircraft (27% share of the Q1 2023 deliveries) to the North-American market whereas Boeing delivered 77 aircraft (59% share) to North America.
- The Asia/Pacific region was Airbus 'second market with 35 deliveries (28% share of totals) vs the fourth market for Boeing with 9 aircraft delivered (7%).

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

Year-to-date amount billed: 2,547 M€ (+29% 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

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.

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.

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