



# EUROCONTROL

EUROPEAN AVIATION OVERVIEW 08-14 Jun 2023

#### **Headlines**

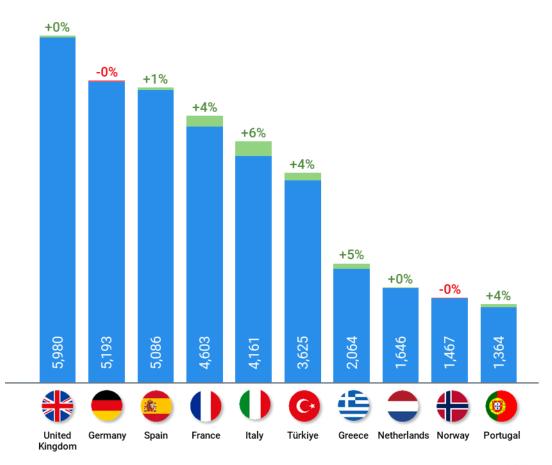
#### (Week 08-14 Jun 2023)

- The Network recorded 31,648 average daily flights (+6% vs 2022), increasing (+2%) vs the previous week and standing at 93% of 2019 levels.
- The top 10 aircraft operators recorded a slight increase (+1.5%) on the previous week.
- For the first half of June, the number of flights in the Network was 91% of the 2019 levels, just below the base scenario of the flight forecast (released in December 2022).
- Istanbul iGA airport recorded the highest-ever number movements recorded at a European airport on Sunday 11 June 2023.
- Despite lower flight volumes, Arrival and Departure punctuality are below 2019 values (-3 and -4 percentage points respectively), mainly as a result of weather and capacity & staffing issues.
- The top 10 European airlines recorded €1.3 billion losses during the first quarter 2023, which is nevertheless a 54% improvement on their losses during Q1 2022.
- The Jet fuel price closed at 2.23 USD/gallon on 12 June, increasing (+2%) on last edition. Current prices have decreased by 25% on average compared to the ones at the beginning of the year.

## **Top 10 Busiest States**

On week 08-14 Jun 2023

(all flights incl. overflights compared with previous week)

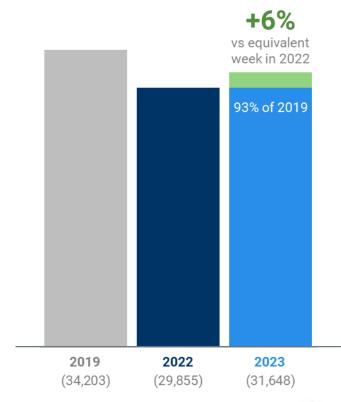




#### **Traffic Situation**

Average daily flights (including overflights)

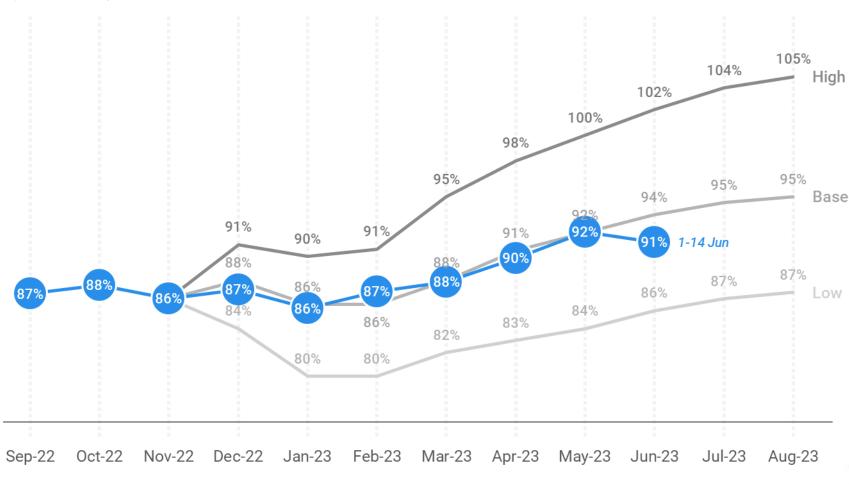
Week 08-14 Jun 2023





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

(base year 2019)



Publication date: December 2022

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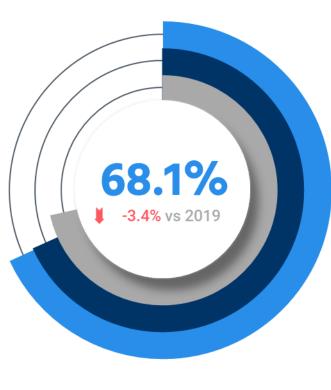
- The latest EUROCONTROL Traffic scenarios were published on 16 December 2022.
- Since that date, network traffic has evolved around the base scenario.
- For the first half of June 2023, flights closed at 91% of June 2019 levels, just below our base scenario (94%).
- On a year-to-date basis, network traffic is at 89% of 2019 and +14% vs 2022

## **Arrival & Departure Punctuality**

(at top airports for the last week)

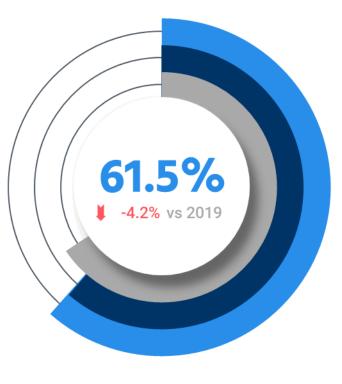
Week 08-14 Jun 2023

#### ARRIVAL PUNCTUALITY



71.5% \_\_\_\_\_\_ in 2019 68.3% \_\_\_\_\_ in 2022

#### **DEPARTURE PUNCTUALITY**



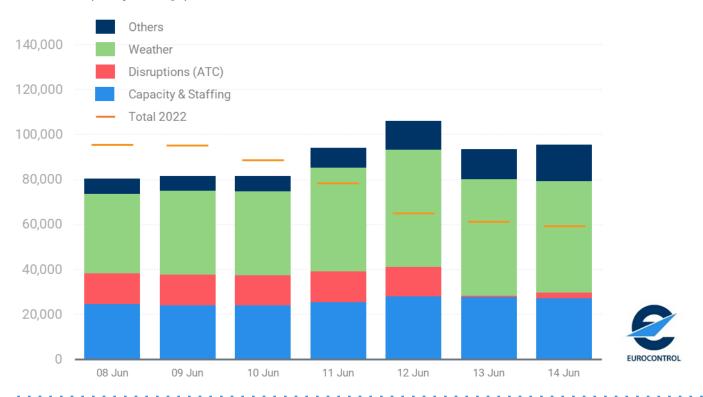
65.7% \_\_\_\_\_\_ in 2019 61.3% \_\_\_\_\_ in 2022

- Over the last week, network punctuality for arrivals and departures was 3.4 and 4.2 percentage points respectively lower than in 2019.
- Weather was the main issue during the last week, with thunderstorm/convective activity affecting many airports (Sunday 11 June being notably bad).
- Elsewhere in the network, ATC staffing issues continued at Copenhagen airport, works in progress continue to generate delays in Antalya and the ATC equipment/radar related delays continued in Athens.
- On the 12<sup>th</sup> of June, the Air Defender 23 NATO military exercise commenced (ending on 23 June) and is impacting Munich, Karlsruhe and Bremen.

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

#### Delays per cause (EUROCONTROL Area)

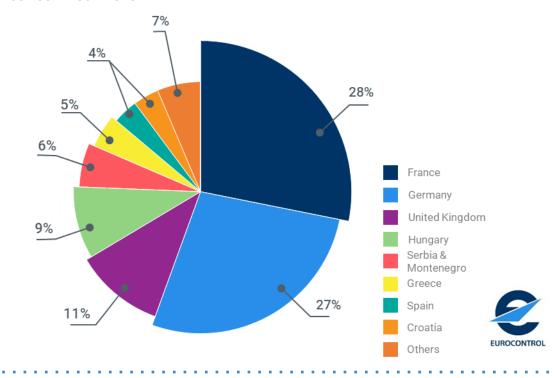
In minutes (7-day average) in 2023



- Last week, on average, en-route ATFM delays have been higher than in 2022 (+16%).
- During the first half of last week, en-route ATFM delays were around 80,000 minutes per day, on average, mainly due to weather issues. The national strike in France on 6 June had a knock-on effect on the 8-14 June period (red bar) as the delay is calculated on a rolling 7-day average value.
- During the second half of last week, delays have increased up to 100,000 minutes owing to weather, staffing/capacity issues and the Air Defender exercise.

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

Week 08-14 Jun 2023



- France accounted for 28% of all en-route ATFM delays over the last week (Paris, Marseille and Reims).
- Germany came second with 27% of all en-route ATFM delays, mainly concentrated in Karlsruhe, Munich and Bremen ACCs.
- UK (mainly London) came third with 10% of all en-route ATFM delays, due to staffing and weather issues.

### **Top 10 Countries**

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

Week 08-14 Jun 2023

No.	Country	Average daily flights	% prev week	% prev year	% 2019
1.	United Kingdom	5,980	+0%	+5%	-9%
2.	Germany	5,193	-0%	+2%	<b>-16</b> %
3.	Spain	5,086	+1%	+3%	-5%
4.	France	4,603	+4%	+4%	-5%
5.	<b>()</b> Italy	4,161	+6%	+6%	-0%
6.	C· Türkiye	3,625	+4%	<b>1</b> +16%	+8%
7.	Greece	2,064	+5%	+6%	<b>+10</b> %
8.	Netherlands	1,646	+0%	+0%	-9%
9.	Norway	1,467	-0%	<b>-1</b> %	<b>-1</b> %
10.	Portugal	1,364	+4%	+9%	1 +9% EL

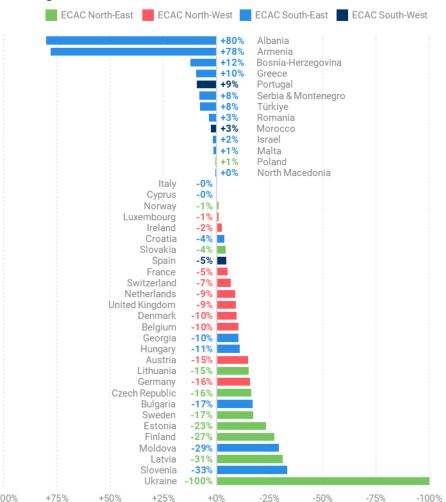


- The top 10 States recorded higher number of flights (+2%) than in the previous week.
- Compared to the previous edition, the rankings remained stable.
- Italy recorded a growth rate of +6%, owing to increases from Ryanair, ITA and light aircraft operators. Greece posted a +5% increase due to light aircraft operators, Smartwings and Wizz Air.
- Traffic levels were particularly high during this period of the year in 2019. Hence, only 3 States (Türkiye, Greece and Portugal) recorded high number of flights compared to 2019.

# States in the EUROCONTROL Network

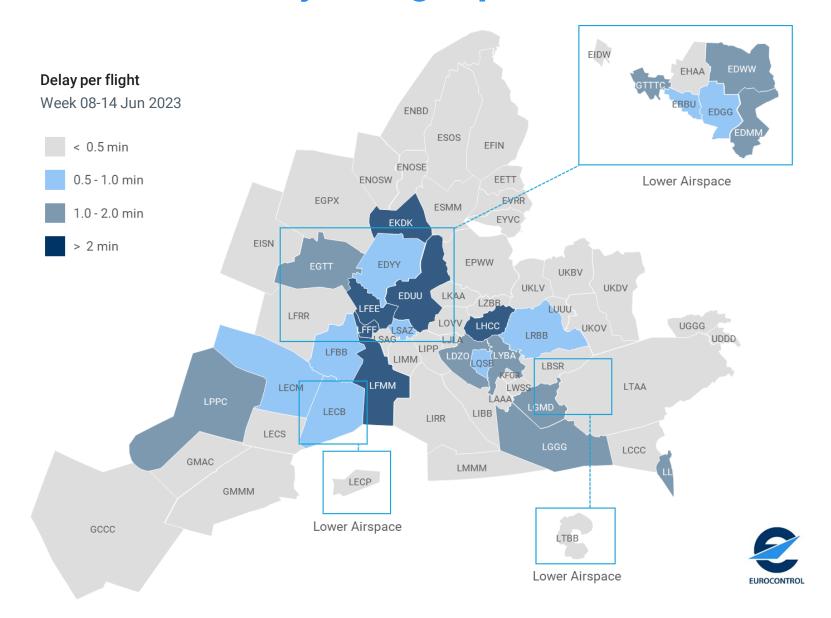
#### Compared to the equivalent week in 2019

Dep/Arr flights for week 08-14 Jun 2023





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



- Over the last week, en-route ATFM delays in the Network have increased by 54% compared to the week before.
- Compared to the same week in 2022, En-Route ATFM delays were 16% higher this year.
- The most affected ACCs over last week were Copenhagen (3.5 min/flight), Budapest (2.7), Karlsruhe (2.7), Reims (2.5), Marseille (2.4) and Paris (2.4).

## **Top 10 Aircraft Operators**

Week 08-14 Jun 2023 (avg daily flights)

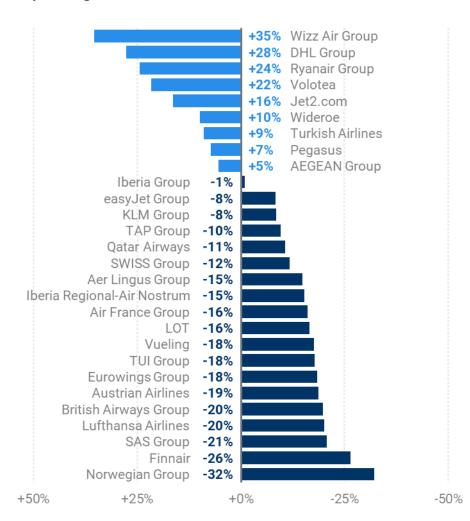
No.	Aircraft operator	Average daily flights	% prev week	% prev year	% 2019
1.	Ryanair Group	3,234	+3%	+8%	+24%
2.	easyJet Group	1,702	+2%	+7%	-8%
3.	Turkish Airlines	1,571	+2%	+12%	+9%
4.	Lufthansa Airlines	1,228	+0%	-2%	-20%
5.	Air France Group	1,075	+2%	+0%	-16%
6.	KLM Group	853	-0%	+7%	-8%
7.	Wizz Air Group	847	+3%	+9%	+35%
8.	British Airways Group	793	-3%	+7%	-20%
9.	SAS Group	705	+2%	+10%	-21%
10.	Eurowings Group	604	-1%	+7%	-18%



- The top 10 aircraft operators recorded a slightly higher number of flights (+1.6%) on the previous week.
- Last week, all but two (British Airways and Eurowings) airlines increased (or kept constant) their operations on the week before.
- Ryanair and Wizz Air posted a +3% growth (each) on the week before as the operators added flights on the flows: domestic Italy, Italy ↔ Spain and France ↔ UK (Ryanair) and on Italy ↔ Romania, Greece ↔ Poland and Greece ↔ Romania (Wizz Air).
- Ryanair, Turkish Airlines and Wizz Air are the only airlines recording more flights than in 2019 (quite strong traffic levels in June 2019).

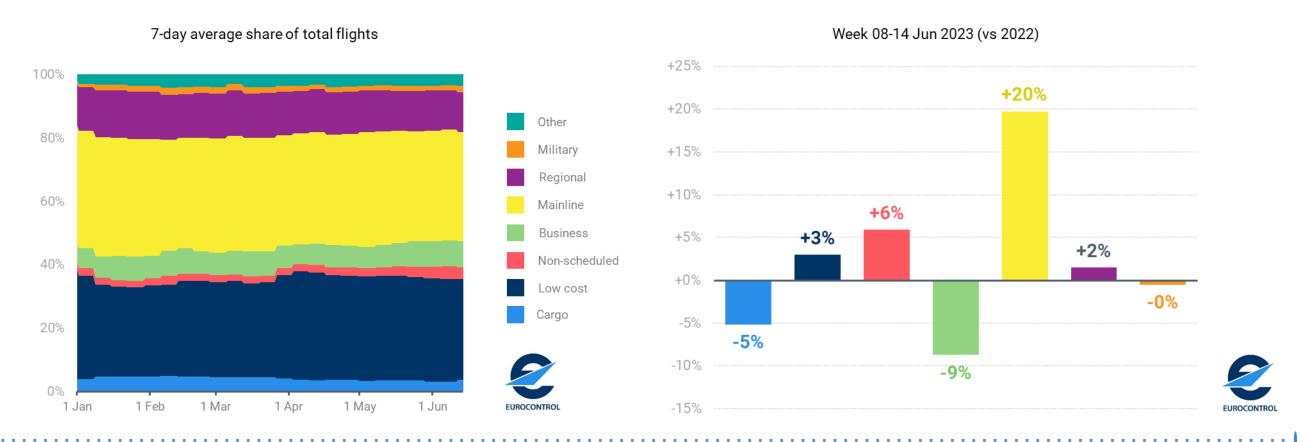
# **Aircraft Operators in the EUROCONTROL Network**

Compared to the equivalent week in 2019 Dep/Arr flights for week 08-14 Jun 2023





## **Market Segments in the EUROCONTROL Network**

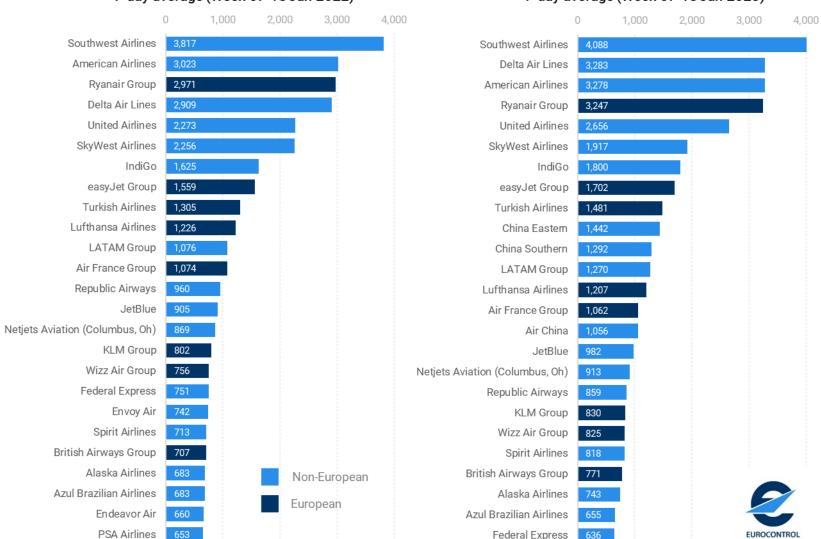


- Compared to 2022, Mainline (+20%), Charter (+6%), Low cost (+3%) and Regional (+2%) are recording growth compared to last year owing to the recovery from the COVID-19 and the summer start.
- Mainline market segment is growing more strongly than Low cost (vs a year ago) as the "flag carriers" segment was slower in its recovery. Moreover, it was operating from main airports where staffing issues were having an impact on the operations.
- Business Aviation (-9%) and All-Cargo (-5%) are now recording fewer flights in 2023 compared to 2022 levels. They recorded quite sustained growth and high variations in 2022.

### **Top 25 Global Aircraft Operators**

(average daily departure flights)





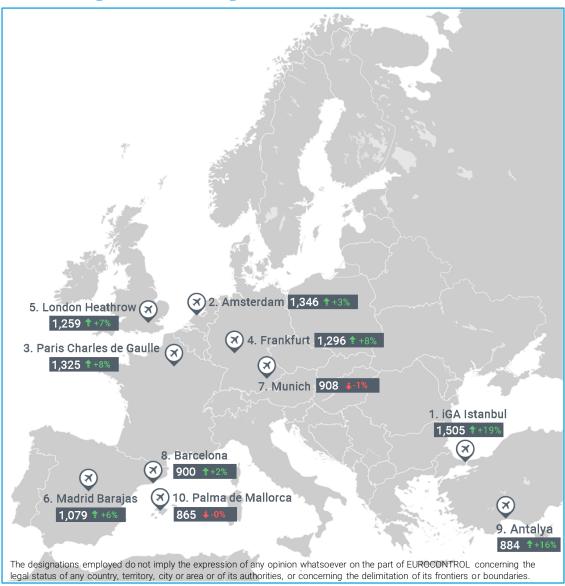
#### 7-day average (Week 07-13 Jun 2023)

Over the last week:

- Eight European airlines are ranked in the Top 25 global aircraft operators (like in 2022). The ranking order is similar to last year too.
- The first European aircraft operator (4th) is Ryanair (same rank compared to two weeks ago).
- The other European airlines in the Top 10 are easyJet (8th) and Turkish Airlines (9th).
- The Top 15 is complemented by Lufthansa (13th) and Air France (14th).
- KLM and Wizz Air are respectively ranked 19th and 20th.
- British Airways is the last European airlines ranked 22nd.

Source: Flightradar24 Historical Global Utilisation data

### **Top 10 Airports**



#### **Airport Ranking**

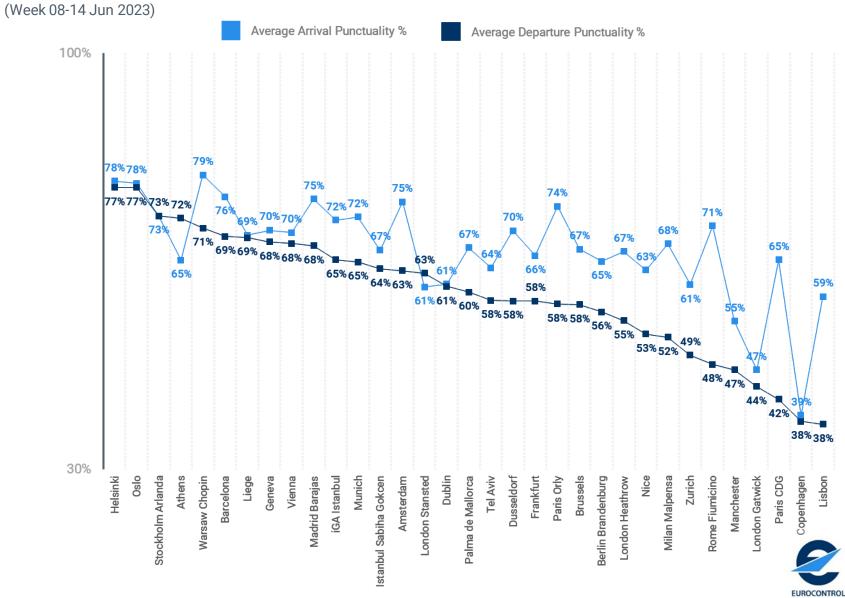
Week 08-14 Jun 2023 (vs 2019)

No.	Airport	Avg. daily dep/arr flights	vs 2022	vs 2019
1.	iGA Istanbul	1,505	<b>1</b> +19%	<b>+22</b> %
2.	Amsterdam	1,346	+3%	<b>↓</b> -10%
3.	Paris Charles de Gaulle	e 1,325	+8%	-9%
4.	Frankfurt	1,296	+8%	<b>↓</b> -14%
5.	London Heathrow	1,259	+7%	-8%
6.	Madrid Barajas	1,079	+6%	<b>↓</b> -13%
7.	Munich	908	<b>↓</b> -1%	<b>↓ -24</b> %
8.	Barcelona	900	+2%	<b>-15</b> %
9.	Antalya	884	<b>1</b> +16%	+1%
10.	Palma de Mallorca	865	<b>↓</b> -0%	<b>+1</b> %

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- Some changes in the ranking compared to the previous edition: swap between Frankfurt and London Heathrow, swap between Munich and Barcelona. Antalya entered the Top 9. And London Gatwick exited.
- Almost all airports experienced sustained growth on 2022; ranging from 2% (Barcelona) to 19% (iGA Istanbul).
- On 11 June, iGA Istanbul handled 1,684 arrivals/departures, beating by 60 flights the previous busiest-ever European airport record set by Frankfurt Airport on 11 September 2019 (Istanbul was hosting the 2023 Champions League Final on 10 June 2023).
- iGA Istanbul, Antalya and Palma de Mallorca are the three airports in 2023 amongst the Top 10 surpassing their 2019 levels.

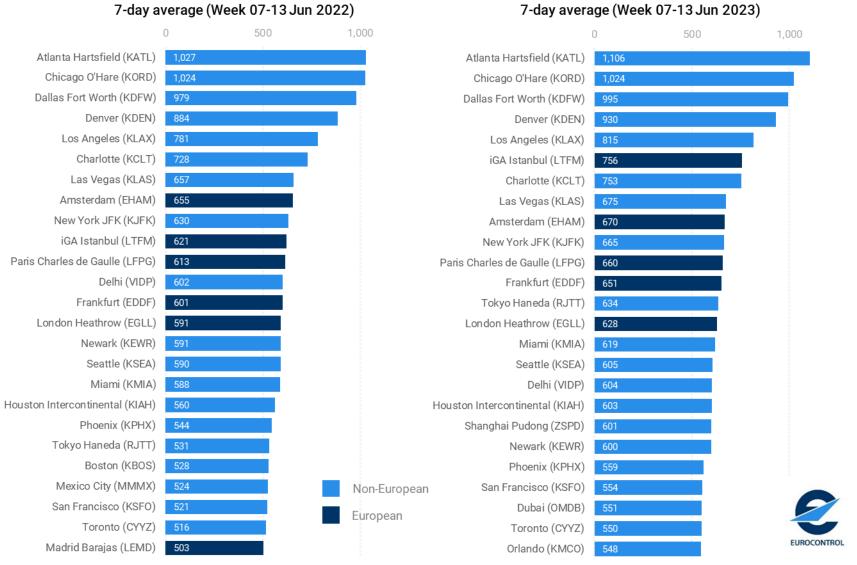
## **Average Arr/Dep Punctuality at Main Airports**



- At most airports, arrival punctuality is higher (i.e. better) than departure punctuality.
- Punctuality deteriorated since March, notably because of the significant enroute ATFM delays related to series of industrial action in France. If the later ceased, arrival and departure punctuality have marginally improved in May but deteriorated again in June and are still worse than in 2022.
- However two airports in this ranking, Athens and London Stansted, 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)

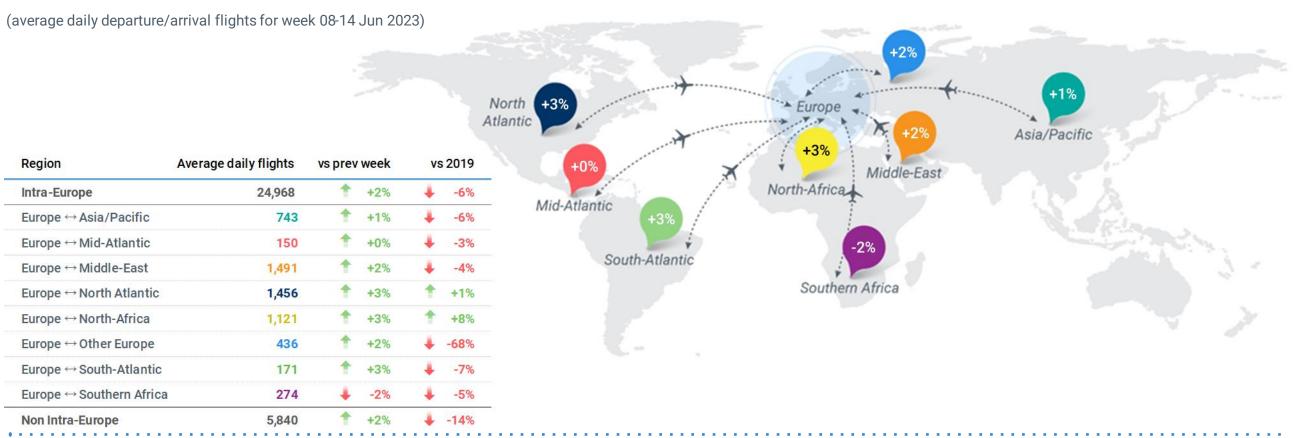


Over the last week

- Five European airports are ranked in the Top 25 of global airport departures (one less than in 2022).
- The first European airport (6th) is iGA Istanbul.
- The other European airports in the Top 25 are Amsterdam (9th), CDG (11th), Frankfurt (12th) and London Heathrow (14th).
- Madrid is no longer included in this Top 25 (compared to 2022).
- The first Chinese airport in 2023 is Shanghai (19th), when none was part of the Top 25 a year ago

Source: Flightradar24 Historical Global Utilisation data

#### **Traffic Flows**



- The main traffic flow was intra-European with 24,968 daily flights last week, higher (+2%) than in the previous week. Inter-Continental flows recorded 5,840 daily flights on average last week, +2% vs the previous week too.
- The second regional flow is between Europe and the Middle-East with 1,491 average daily flights last week, showing an increase of 2% vs the previous week.
- The third flow is with North America with 1,456 daily flights, higher (+3%) than in the previous week.
- The fourth flow is with North Africa, with 1,121 flights per day, showing a 3% increase on previous week.
- Flows with Other Europe (incl. Russian Federation) are still lagging behind and were at -68% compared to 2019.
- The fifth flow between Europe and Asia/Pacific is still lagging behind, to a lesser extent, at -6% compared to 2019. European flows with China (excl. Hong-Kong) recorded 143 daily flights on average over 08-14 June 2023, growing by 14% compared to the same period a month ago.

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

(average daily departure/arrival flights for the last week)
Week 08-14 Jun 2023

No.	Country pair	Average daily flights	% prev week	% prev year	% 2019
1.	UK ↔ US	335	+3%	+14%	+0%
2.	Germany ↔ US	179	-2%	+5%	+1%
3.	France ↔ US	147	+4%	+20%	+10%
4.	Italy ↔ US	91	+5%	+13%	+3%
5.	$\textbf{Netherlands}  \leftrightarrow  \textbf{US}$	79	+0%	-4%	-10%
6.	$\textbf{Ireland}  \leftrightarrow  \textbf{US}$	78	+3%	+22%	+5%
7.	Spain ↔ US	72	+3%	+1%	-9%
8.	$UAE \leftrightarrow UK$	58	+3%	+32%	-6%
9.	Canada ↔ UK	45	+7%	-8%	-13%
10.	Switzerland ↔ US	45	+1%	+28%	+6%



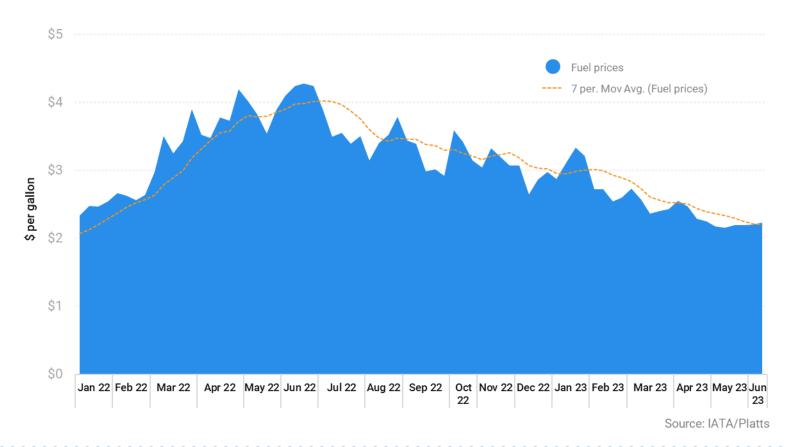
- Only one change in the ranking compared to the previous edition: Canada ↔ UK and Switzerland ↔ US swapped rank.
- All but one of the flows posted an increase on previous week (ranging from 0% to 7%).
- Eight of the top 10 Long Haul Country-Pairs are with the US, the main three being between US and UK, Germany and France.
- All flows except Germany ↔ US posted an increase on 2022 (same week).
- Six flows are now above 2019 levels.
- United Arab Emirates ↔ UK is the only non North-American flows in the Top 10.

#### **Economics**

Week 08-14 Jun 2023



# **Jet Fuel Price (Europe)**



- The average price of jet fuel increased to 2.23 USD/gallon on 9 June, it represents a drop of 25% 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 \$2.23/gallon a year after.

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

Constant prices and exchange rate, Euro

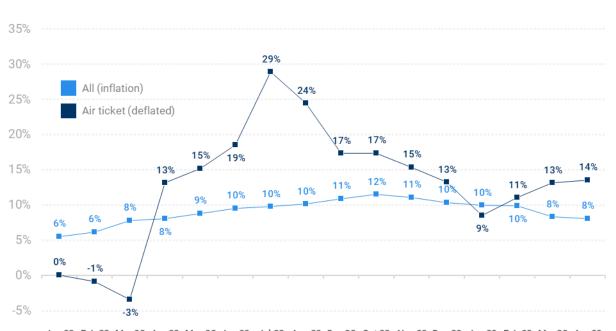


Source: Oxford Economics Ltd.

- 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



Jan 22 Feb 22 Mar 22 Apr 22 May 22 Jun 22 Jul 22 Aug 22 Sep 22 Oct 22 Nov 22 Dec 22 Jan 23 Feb 23 Mar 23 Apr 23

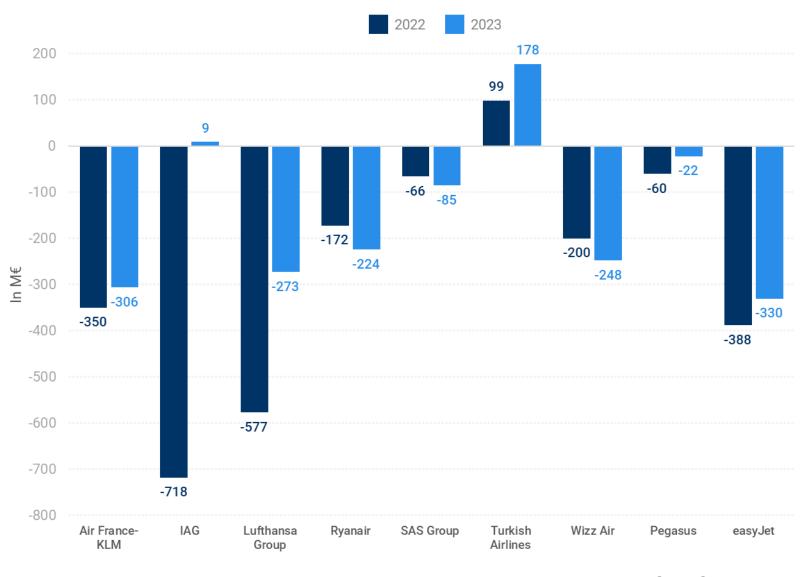
Source: EUROSTAT

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 interalia sustained demand, reduced flight choice and high jet fuel prices.

### **Operating Profits of Airlines**

In M€ for first quarter in 2023 and 2022



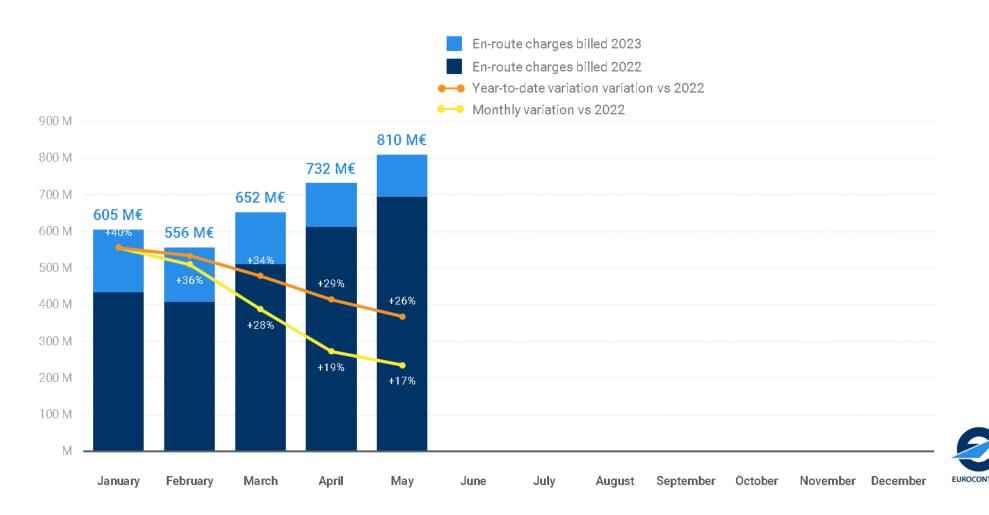
During Q1 2023, and compared to Q1 2022:

- Most European airlines lost money in the first quarter, traditionally the weakest time of year for travel.
- In this Top 9, all but 2 aircraft operators posted profits in Q1 2023:
- Turkish Airlines has recorded the highest operating profits for the quarter (+178 M€).
- IAG is the only flag carrier groups also posting a (weak) positive operating profits.
- Aircraft operators considered in this sample recorded 1.3 Bn€ of losses in Q1 2023, a 54% improvement on Q1 2022 losses (-2.4 Bn€).

Source: Company reports

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

Year-to-date amount billed: 3,357 M€ (+26% vs 2022)



- At network level, 810M€ were billed in May which represents +17% vs 2022 and +16% 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 May 2023 variation vs May 2022 (+17%) is explained by an increase in Unit Rates of +7% and an increase in Service Units of +11.5%.
- 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 since March.
- On a year-to-date basis, EUROCONTROL has billed 3,357 M€ which is +26% vs 2022

#### Supporting European Aviation

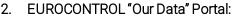


To further assist you in your analysis, EUROCONTROL provides the following additional information on a daily basis (daily updates at 7:30 CET for the first item) and every Friday for the last item:

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 the largest airline operators.



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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