AVIATION INTELLIGENCE+

EUROCONTROL

EUROPEAN AVIATION OVERVIEW

10-16 Jul 2023

Tuesday 18 July 2023

Headlines

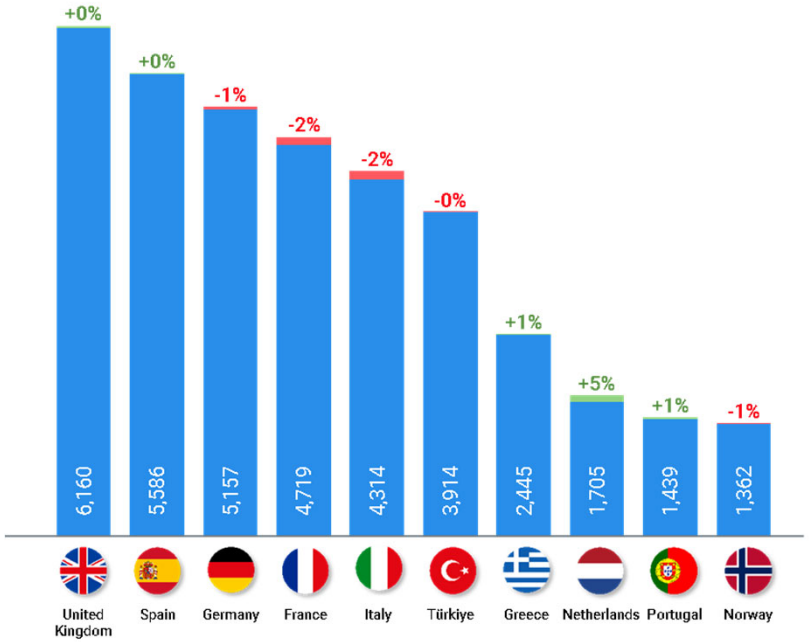
(Week 10-16 Jul 2023)

- The Network recorded 32,882 average daily flights (+8% vs 2022), remaining stable (-0.5%) vs the previous week and standing at 93% of 2019 levels.
- Early July, the Network recorded its highest number of flights since the beginning of COVID (34,637 on Friday 7 July 2023). This is still 7% below the record for the busiest day ever (37,228 on 28 June 2019).
- For the first half of July, the number of flights in the Network was 93% of 2019 levels, just below our Base scenario of forecasted flights released in December 2022.
- On average, operators did not deploy additional capacity over the last week; the top 10 aircraft operators recorded a slight decrease (-1%) vs the previous week.
- Arrival and departure punctuality deteriorated, closing at 9 and 10 percentage points (respectively) below 2019.
- EUROCONTROL billed 858M€ of en-route charges for June flights, 17% above the amount billed for June 2022 flights. On a year-to-date basis, EUROCONTROL billed 4,214M€ in 2023, +24% compared to 2022, as a result of a combination of more service units and higher unit rates.
- The jet fuel price closed at 2.46 USD/gallon on 14 July 2023, increasing (+6%) over two weeks. Current prices have however decreased by 23% compared to the beginning of the year.

Top 10 busiest States

On week 10-16 Jul 2023

(all flights incl. overflights compared with previous week)

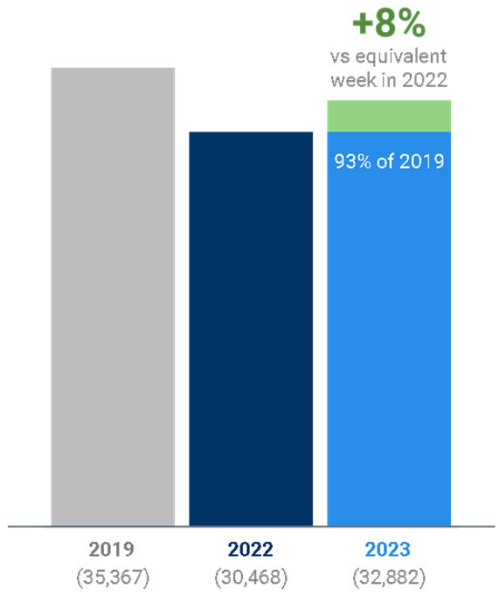


EUROCONTROL

Traffic situation

Average daily flights (including overflights)

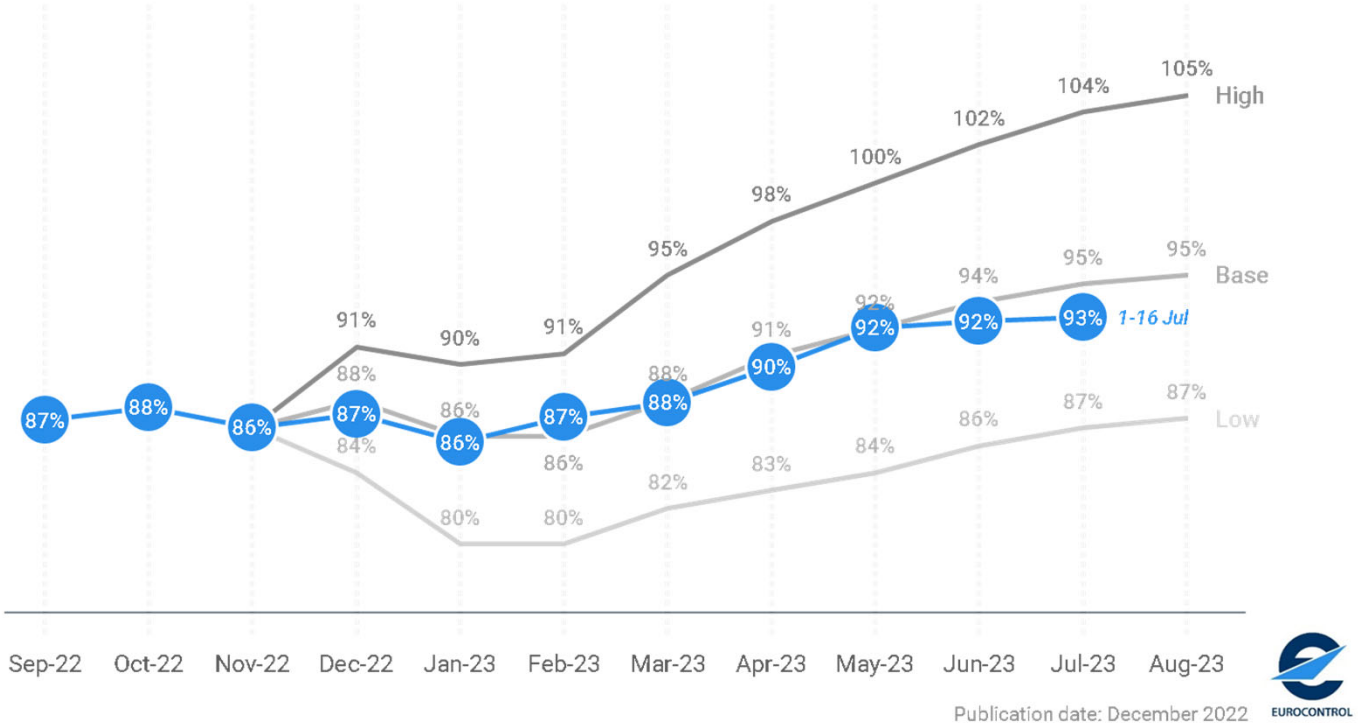
Week 10-16 Jul 2023



EUROCONTROL

Overall situation compared to the EUROCONTROL Traffic Scenarios

(base year 2019)

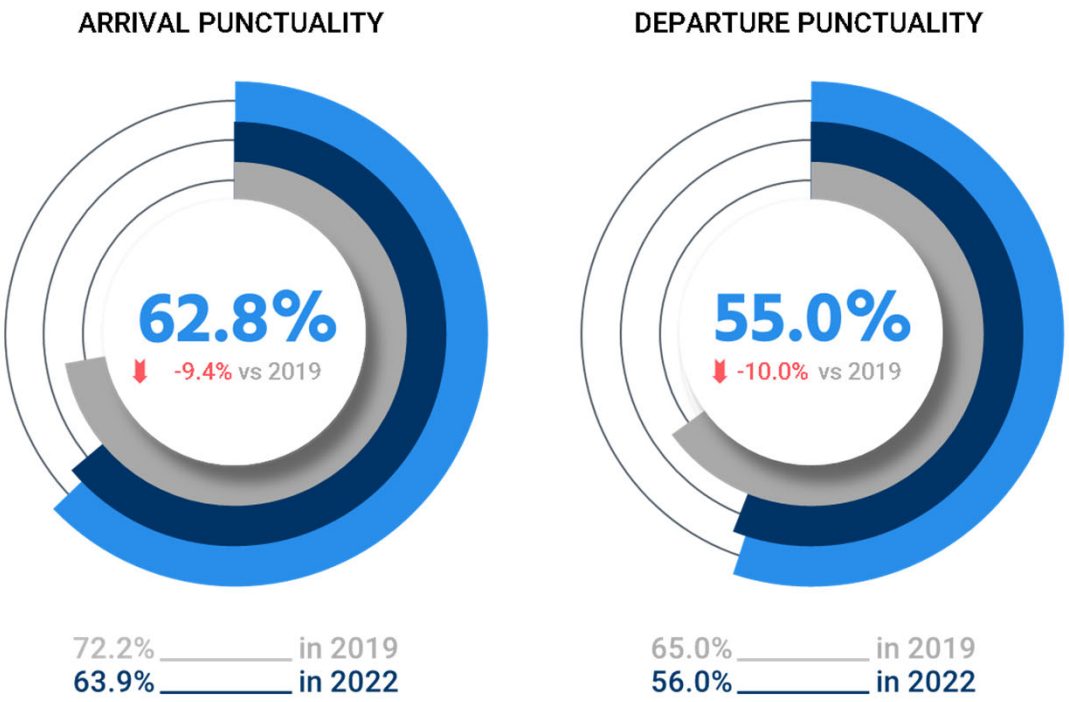


- The latest EUROCONTROL Traffic scenarios were published on 16 December 2022.
- Since that date, Network traffic has evolved largely in line with our Base scenario.
- For the first half of July, flights closed at 93% of July 2019 levels, below our Base scenario (95%).
- On a year-to-date basis, Network traffic is at 90% of 2019, and +12% vs 2022

Arrival & departure punctuality

(at top airports for the last week)

Week 10-16 Jul 2023



- Network punctuality was worse than in the equivalent week in 2019, with arrival punctuality at 62.8% and departure punctuality at 55.0%, decreasing by 9.4 and 10.0 percentage points respectively. This was also a deterioration, although much smaller, compared to the same period in 2022.
- Seasonal weather, ATC capacity and ATC staffing delays strongly influenced en-route ATFM delays across the Network during the week with en-route weather regulations strongly affecting punctuality on 12, 13 and 15 July.
- Looking at airports, an Atlantic low-pressure system bringing high winds affected airports across Ireland and the UK on July 15 (strong impact on all London airports). Cumulonimbus activity also affected Frankfurt, Zurich and Milan-Malpensa airports during the week. Many leisure destination airports have become busier, and some have experienced increased delays. Athens, as well as many Greek island airports, was affected by ATC and aerodrome capacity delays throughout the week (see slide 12).

En-route ATFM delays

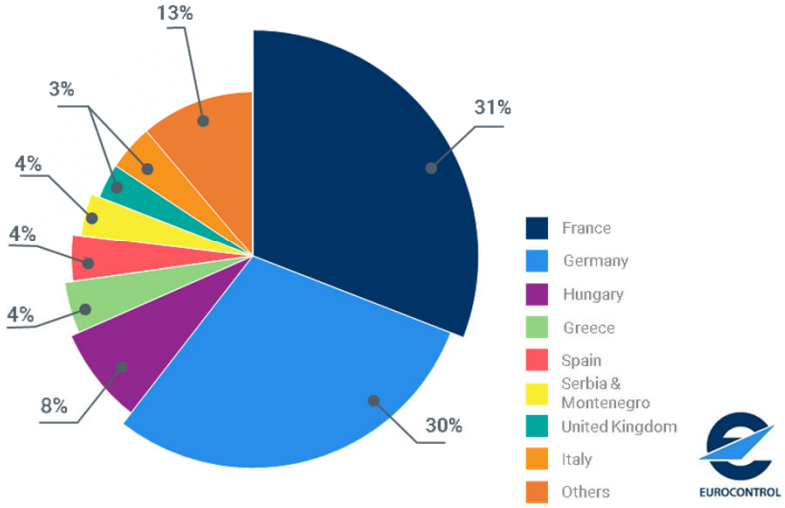
Delays per cause (EUROCONTROL Area)

In minutes (7-day average) in 2023

- For the period 10-16 July, en-route ATFM delays were significantly higher than in 2022 (7-day average shown in graph).
- On average, they amounted to 112,000 minutes a day, with the main causes being capacity & staffing and weather.

Share of en-route ATFM delays

Week 10-16 Jul 2023



- France accounted for 31% of all en-route ATFM delays, mainly concentrated in the Marseille and Reims ACCs.
- Germany came second with 30% of all en-route ATFM delays, mainly concentrated in the Karlsruhe and Bremen ACCs.
- Hungary came third with 8% of all en-route ATFM delays.

Top 10 States

Departures and arrivals

Week 10-16 Jul 2023

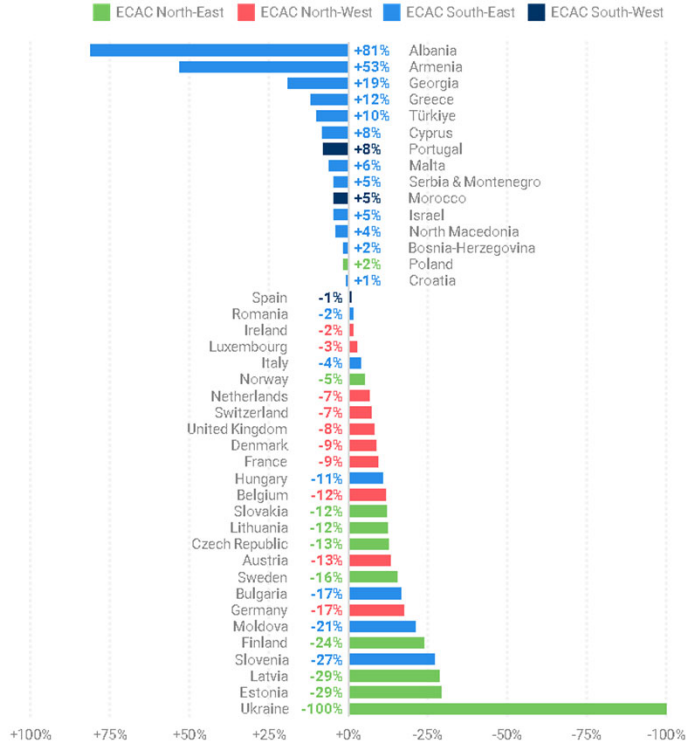
No.	Country	Average daily flights	% prev week	% prev year	% 2019
1.	United Kingdom	6,160	+0%	+7%	-8%
2.	Spain	5,586	+0%	+6%	-1%
3.	Germany	5,157	-1%	+5%	-17%
4.	France	4,719	-2%	+6%	-9%
5.	Italy	4,314	-2%	+7%	-4%
6.	Türkiye	3,914	-0%	+12%	+10%
7.	Greece	2,445	+1%	+4%	+12%
8.	Netherlands	1,705	+5%	+9%	-7%
9.	Portugal	1,439	+1%	+10%	+8%
10.	Norway	1,362	-1%	+10%	-5%

- The top 10 States recorded a similar number of flights compared to the previous week (-0.3%).
- Compared to the previous edition: Portugal and Norway swapped places.
- The Netherlands recorded a 5% growth rate, owing to increases from KLM Group and light aircraft operators.
- Three States within the top 10 are now recording growth above 2019 (Türkiye, Greece and Portugal) while Spain and Italy are relatively close to their pre-COVID levels. The five remaining States are still between 17% and 5% below 2019 levels.

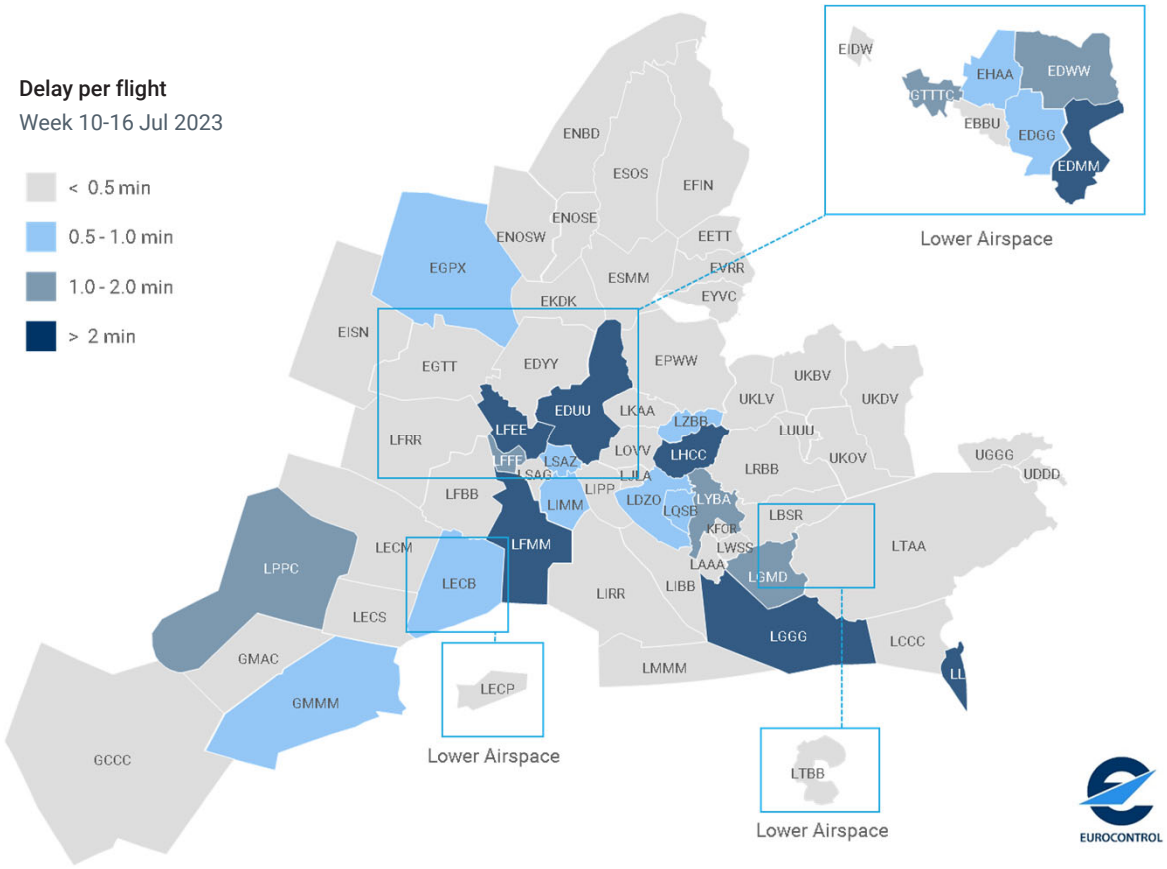
States in the EUROCONTROL Network

Compared to the equivalent week in 2019

Dep/Arr flights for week 10-16 Jul 2023



En-route ATFM delayed flights per Area Control Centre



- Over the last week, en-route ATFM delays have increased by 13% compared to the week before and are above 2022 levels (112,000 minutes per day, on average).
- Compared to the same week in 2022, en-route ATFM delays were 23% higher this year.
- Last week, the most affected ACCs were:
  - Marseille (4.2 min/flight), owing to ongoing ATC capacity and staffing issues,
  - Karlsruhe (4.0 min/flight), owing to capacity and weather issues,
  - Tel Aviv (3.3 min/flight),
  - Reims (2.8 min/flight), owing to ATC capacity and staffing issues,
  - Athens (2.6 min/flight), owing to ongoing staffing issues,
  - Munich (2.5 min/flight), due to system implementation and transition as well as weather issues, and,
  - Budapest (2.4 min/flight), due to military activity and weather issues.
- Overall, France was responsible for 31% of all en-route ATFM delays last week, followed by Germany (30%) and Hungary (8%).

Top 10 aircraft operators

Week 10-16 Jul 2023 (avg daily flights)

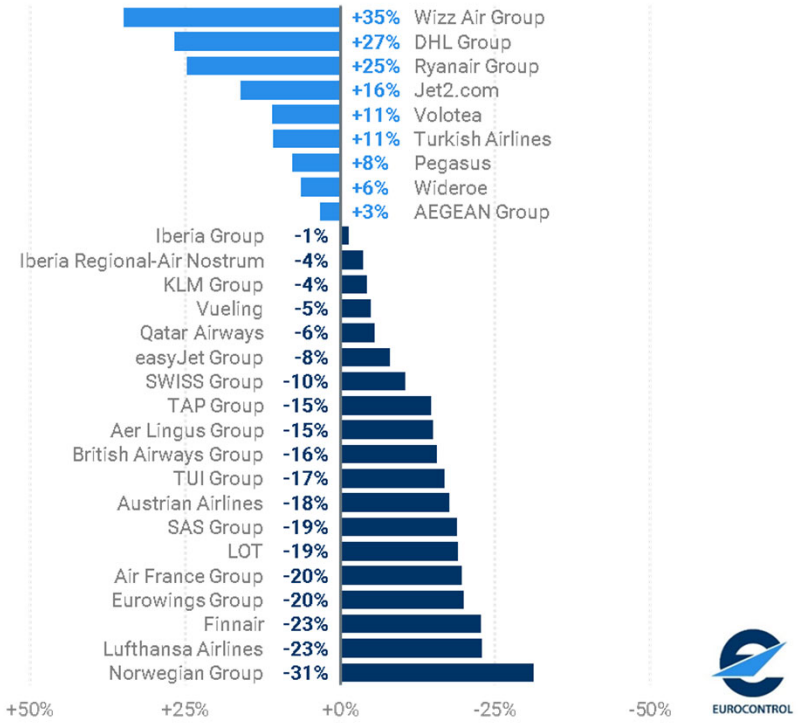
No.	Aircraft operator	Average daily flights	% prev week	% prev year	% 2019
1.	Ryanair Group	3,277	-1%	+11%	+25%
2.	easyJet Group	1,735	-0%	+9%	-8%
3.	Turkish Airlines	1,616	-2%	+7%	+11%
4.	Lufthansa Airlines	1,219	-3%	+6%	-23%
5.	Air France Group	1,080	-4%	+6%	-20%
6.	Wizz Air Group	900	-2%	+14%	+35%
7.	KLM Group	897	+6%	+17%	-4%
8.	British Airways Group	833	+0%	+21%	-16%
9.	Vueling	697	-1%	-1%	-5%
10.	SAS Group	635	-0%	+102%	-19%

EUROCONTROL

- The top 10 aircraft operators posted a slight decrease in the number of flights (-1% on average) compared to the previous week.
- Last week, only two airlines/airline groups had more daily operations compared to the week before (KLM and British Airways).
- KLM Group posted a 6% week-on-week growth adding flights mainly on the following flows: Germany ↔ Netherlands, UK ↔ Netherlands and France ↔ Netherlands.
- Three airlines within the top 10 are flying well above their 2019 flight levels: +35% (Wizz Air Group), +25% (Ryanair Group) and +11% (Turkish Airlines).

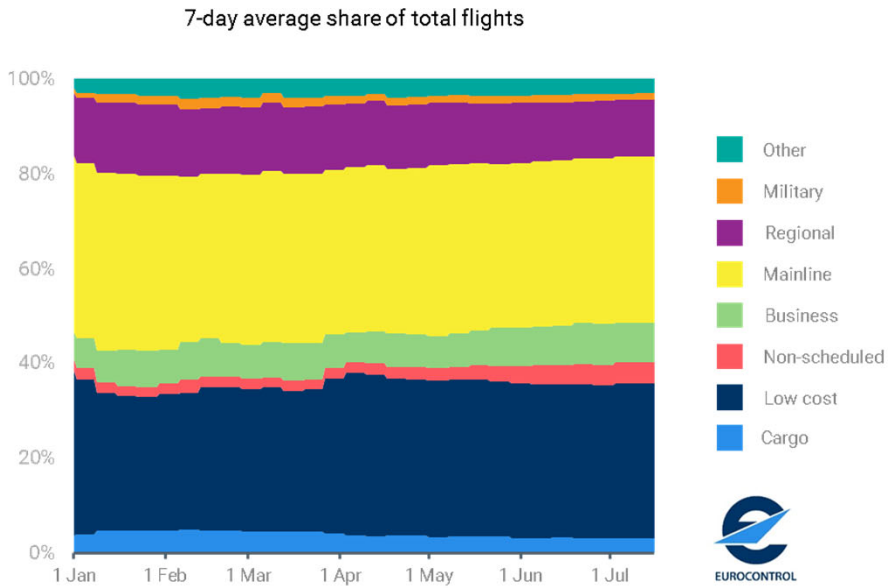
Aircraft operators in the EUROCONTROL Network

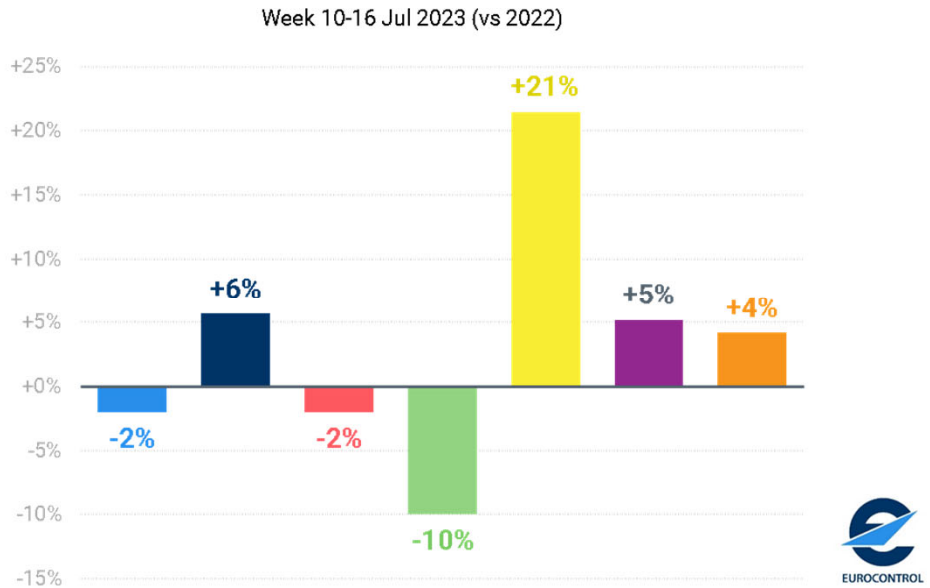
Compared to the equivalent week in 2019
Dep/Arr flights for week 10-16 Jul 2023



EUROCONTROL

Market segments in the EUROCONTROL Network

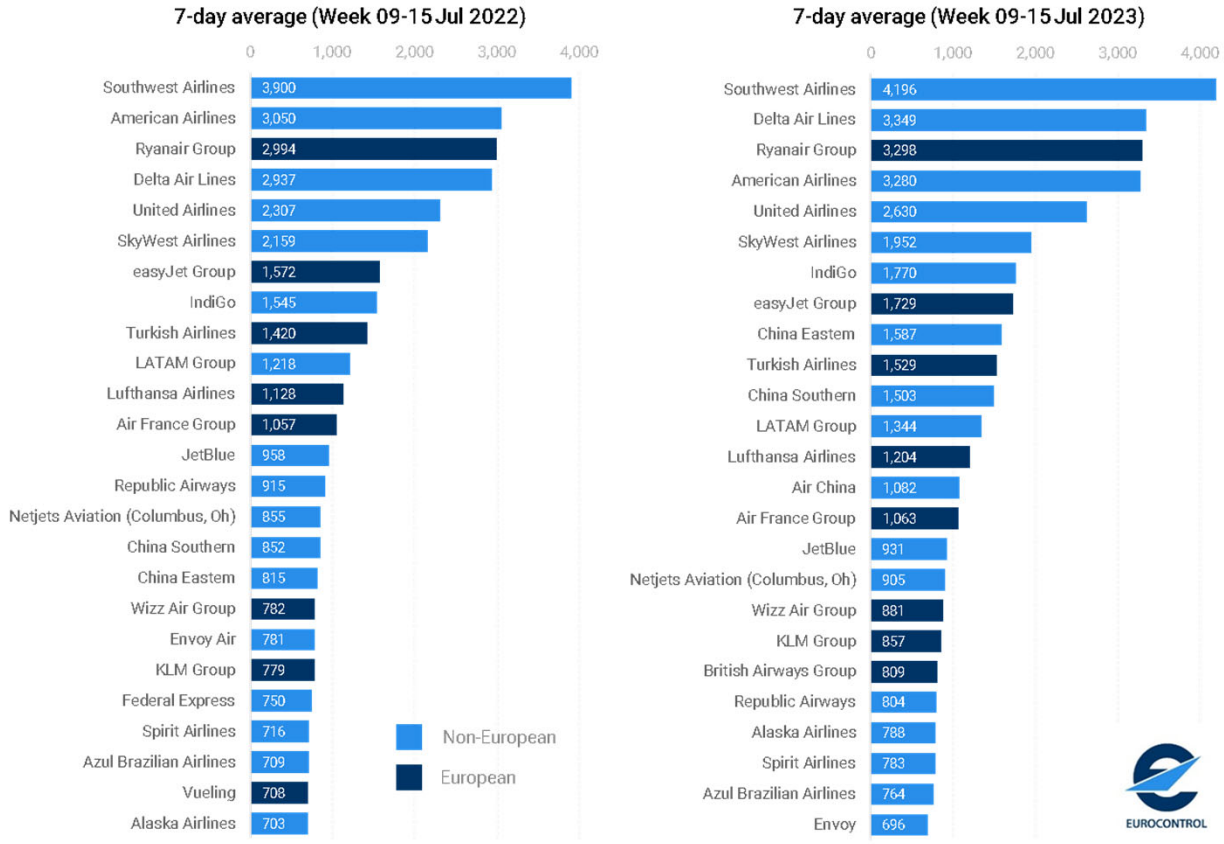




- Compared to 2022, the Mainline (+21%), Regional (+5%), and Low-cost (+6%) sectors are recording growth, reflecting their continuing recovery since the COVID-19 outbreak owing to pent-up demand and the summer season.
- Business aviation (-10%) and All-cargo (-2%) are now recording fewer flights in 2023 compared to 2022 levels. The All-cargo market share has now stabilised (a market share of 3.1% of all flights for the first half of July 2023) and is levelling off with no more rebound effect from 2022 events such as Omicron or the start of the Russian war of aggression against Ukraine. Business aviation (8.4% of total flights for the first half of 2023) is also levelling off, with commercial airline activity (Mainline, Regional and Low-cost) now almost closing the gap between 2023 and 2019.
- The Charter sector, which accounted for 4.5% of all flights for the first half of July 2023, recorded fewer flights (-2%) during the week 10 – 16 Jul 2023, compared to the same week in 2022.

Top 25 global aircraft operators

(average daily departure flights)

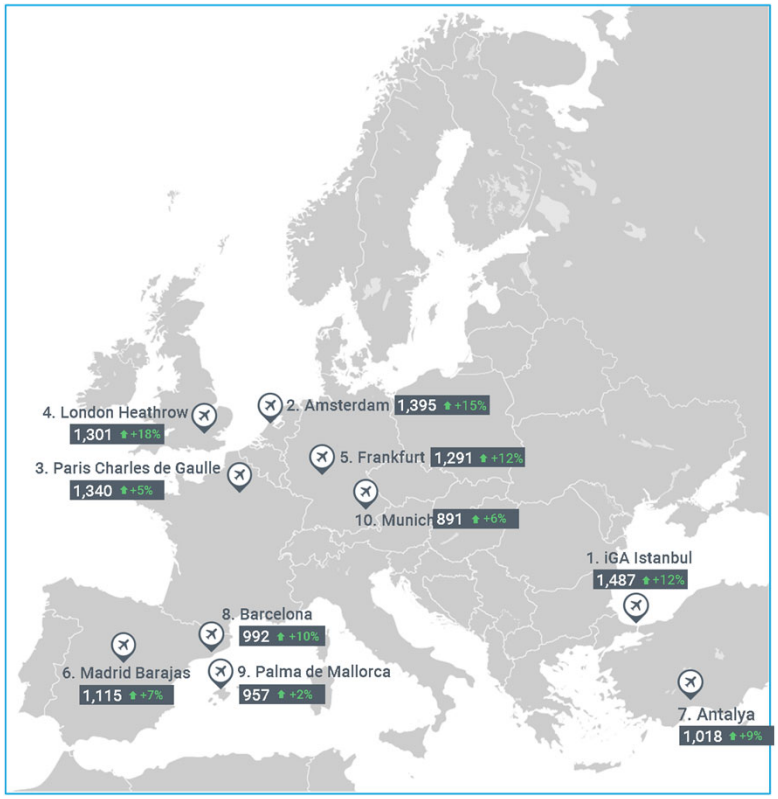


Source: Flightradar24 Historical Global Utilisation data

Over the last week:

- Eight European airlines are ranked in the top 25 global aircraft operators (as was the case in 2022).
- The first European aircraft operator is Ryanair – now 3rd globally and ranked one place lower than two weeks ago.
- The other European airlines in the top 10 are easyJet (8th) and Turkish Airlines (10th)
- Five more airlines make the top 20: Lufthansa (13th), Air France (15th), Wizz Air (18th), KLM (19th) and British Airways (20th).
- Vueling is not in the top 25 this year though they were in 2022.

Top 10 airports



Airport ranking

Week 10-16 Jul 2023 (vs 2019)

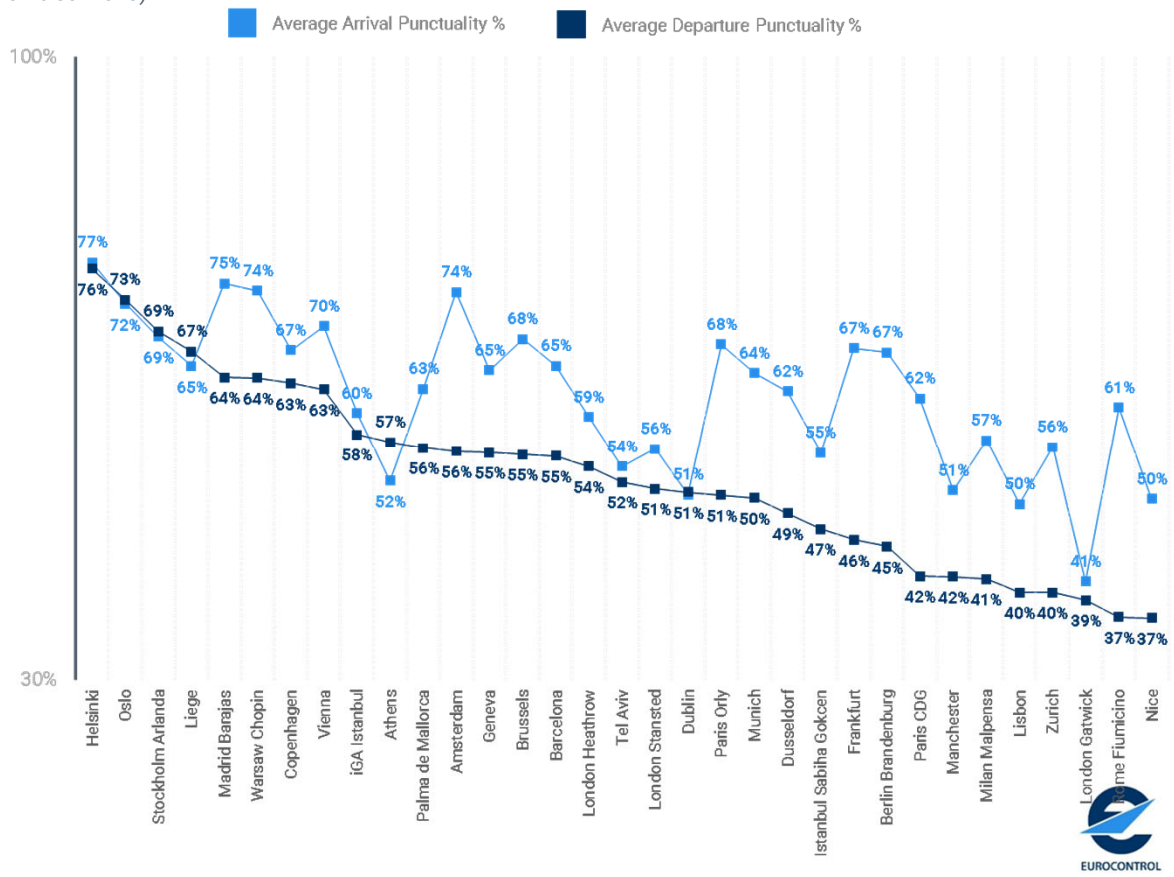
No.	Airport	Avg. daily dep/arr flights	vs 2022	vs 2019
1.	iGA Istanbul	1,487	+12%	+18%
2.	Amsterdam	1,395	+15%	-7%
3.	Paris Charles de Gaulle	1,340	+5%	-12%
4.	London Heathrow	1,301	+18%	-5%
5.	Frankfurt	1,291	+12%	-15%
6.	Madrid Barajas	1,115	+7%	-12%
7.	Antalya	1,018	+9%	+9%
8.	Barcelona	992	+10%	-8%
9.	Palma de Mallorca	957	+2%	+5%
10.	Munich	891	+6%	-28%

EUROCONTROL

- Some changes in the ranking compared to the previous edition: Frankfurt and London Heathrow swap places, as do Palma de Mallorca and Munich.
- All airports experienced sustained growth vs 2022, ranging from +2% (Palma de Mallorca) to +18% (London Heathrow).
- Three top 10 airports – iGA Istanbul, Antalya and Palma de Mallorca – are currently handling traffic above their 2019 levels.

Average arr/dep punctuality at main airports

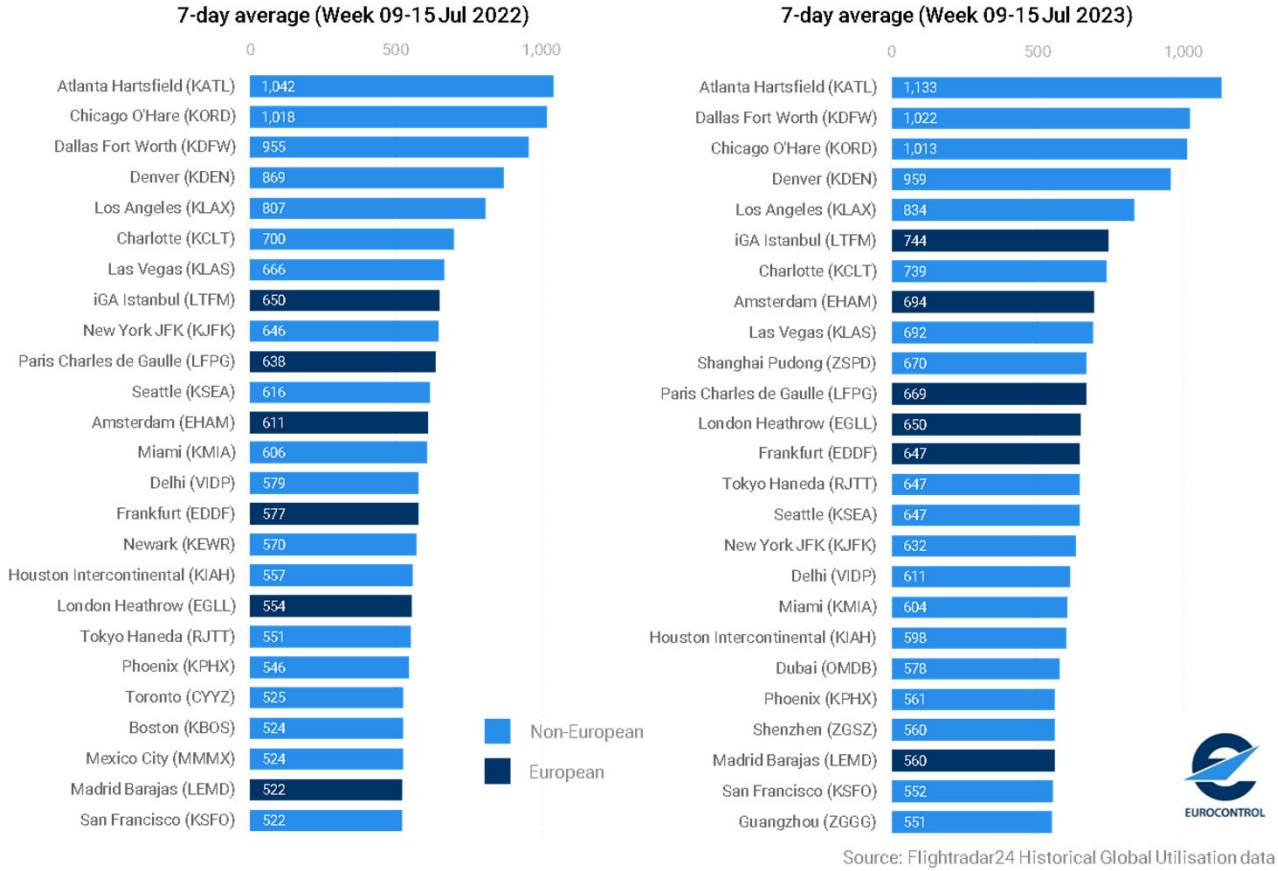
(Week 10-16 Jul 2023)



- Arrival punctuality is higher (i.e. better) than departure punctuality at most airports.
- After having deteriorated over the March-April period because of significant en-route ATFM delays related to industrial action in France, arrival and departure punctuality have only marginally improved in May and June, and are still worse than in 2019.
- However, a few airports, notably Oslo, Liège and Athens have higher departure than arrival punctuality, which indicates that these airports have been able to absorb delays.

Top 25 global airport departures

(average daily departure flights)



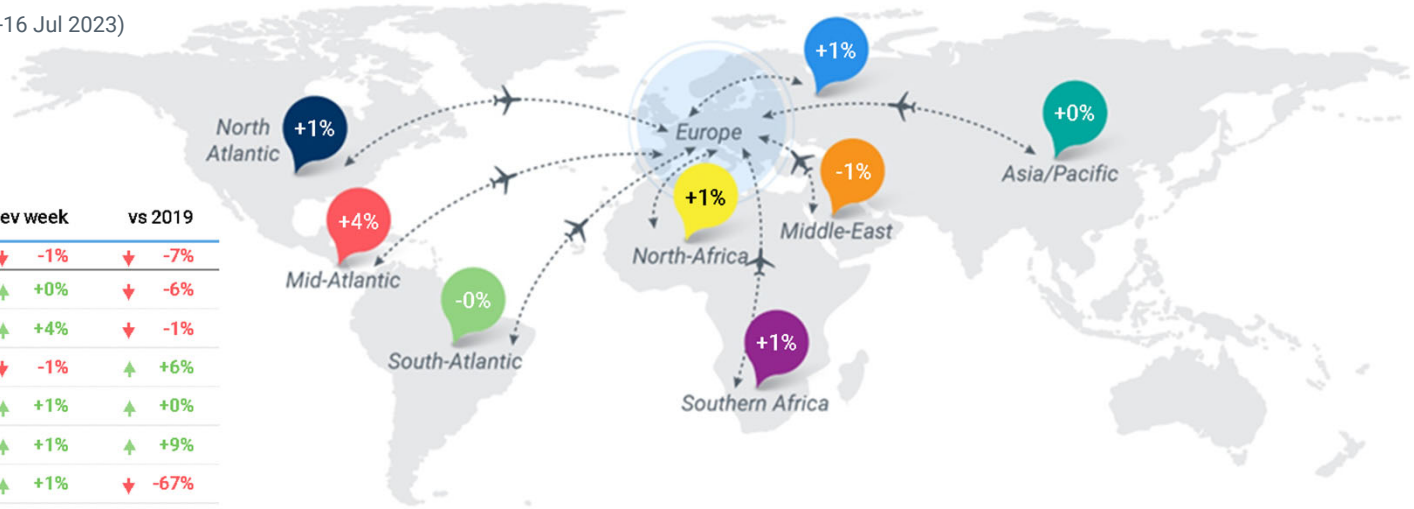
Source: Flightradar24 Historical Global Utilisation data

Over the last week:

- Six European airports are ranked in the top 25 of global airport departures (the same number as in 2022).
- The highest ranked European airport (6th) is iGA Istanbul Airport, now two places ahead of 2022.
- The other European airports in the top 25 are Amsterdam (8th), Paris CDG (11th), London Heathrow (12th), Frankfurt (13th) and Madrid (23rd).
- The first Chinese airport to make the 2023 list is Shanghai (10th), with none appearing in the top 25 a year ago.

Traffic flows

(average daily departure/arrival flights for week 10-16 Jul 2023)



Region	Average daily flights	vs prev week	vs 2019
Intra-Europe	25,621	-1%	-7%
Europe ↔ Asia/Pacific	775	+0%	-6%
Europe ↔ Mid-Atlantic	170	+4%	-1%
Europe ↔ Middle-East	1,767	-1%	+6%
Europe ↔ North Atlantic	1,478	+1%	+0%
Europe ↔ North-Africa	1,292	+1%	+9%
Europe ↔ Other Europe	442	+1%	-67%
Europe ↔ South-Atlantic	177	-0%	-11%
Europe ↔ Southern Africa	291	+1%	-6%
Non Intra-Europe	6,392	+1%	-11%

- The main traffic flow was intra-European with 25,621 daily flights last week, fewer (-1%) than the previous week. Intercontinental flows recorded 6,392 daily flights on average last week, +1% vs the previous week.
- The second-largest regional flow is between Europe and the Middle East: 1,767 average daily flights last week represented a decrease of 1% vs the previous week (fewer flights with Jordan, Lebanon, and Iraq).
- The third flow is to/from North America with 1,478 daily flights, slightly increased (+1%) vs the previous week's value.
- The fourth flow is to/from North Africa, with 1,292 flights per day, slightly increased (+1%) vs the previous week's value.
- Flows with Other Europe (including the Russian Federation) remain massively reduced at -67% compared to 2019.
- Flows between Europe and Asia/Pacific are still lagging behind but to an increasingly lesser extent, now only -6% compared to 2019. European flows with China were at 208 daily flights last week (28% below July 2019 levels).

Top 10 long-haul country pairs

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

Week 10-16 Jul 2023

No.	Country pair	Average daily flights	% prev week	% prev year	% 2019
1.	UK ↔ US	339	+1%	+14%	+1%
2.	Germany ↔ US	177	+1%	+3%	-0%
3.	France ↔ US	142	-2%	+10%	+1%
4.	Italy ↔ US	97	+0%	+18%	+11%
5.	Netherlands ↔ US	79	+3%	+1%	-10%
6.	Ireland ↔ US	74	+2%	+7%	+1%
7.	Spain ↔ US	72	-2%	+6%	-10%
8.	UAE ↔ UK	59	+3%	+22%	-10%
9.	Canada ↔ UK	50	+3%	-8%	-10%
10.	Canada ↔ France	46	+1%	+14%	+8%

EUROCONTROL

- Since the last edition, there have been a few changes in the rankings for the top 10 long-haul country pairs: Spain ↔ US and Ireland ↔ US have swapped places.
- All but two of the flows posted an increase vs the previous week (ranging from +0% to +3%).
- Seven of the Top 10 long-haul country pairs are with the US, the main three being between the US and the UK, Germany and France.
- All but one flow posted an increase on the same week in 2022.
- Five flows are currently above 2019 levels (UK ↔ US, France ↔ US, Italy ↔ US, Ireland ↔ US and Canada ↔ France).

Economics

Week 10-16 Jul 2023

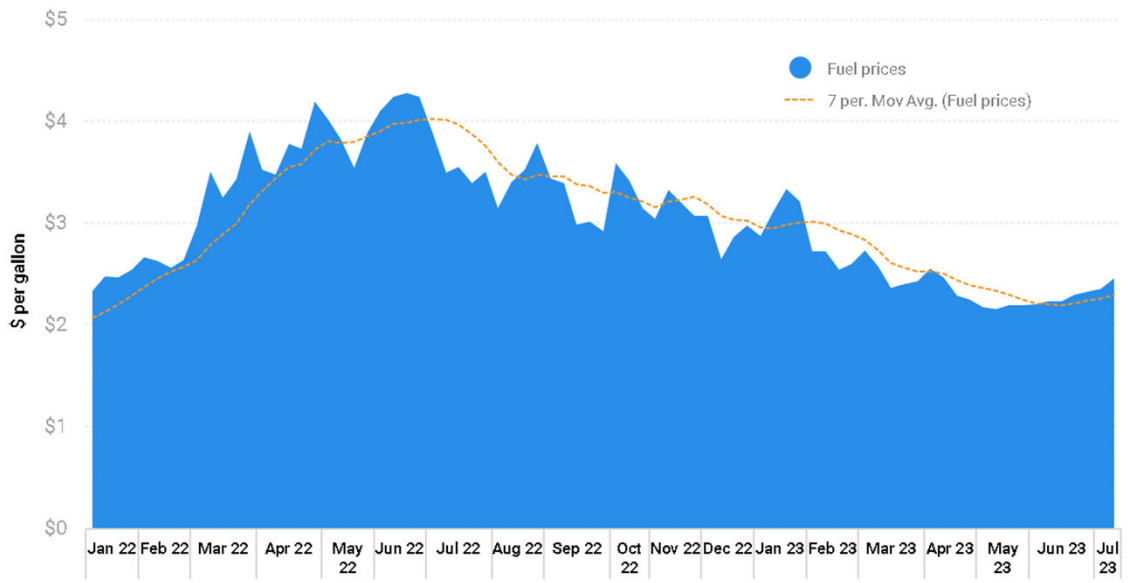
14 Jul 2023
avg fuel price:

$2.46 /gallon

6%
vs. $2.32 /gallon
on 30 Jun 2023

Source: IATA/Platts

Jet fuel price (Europe)

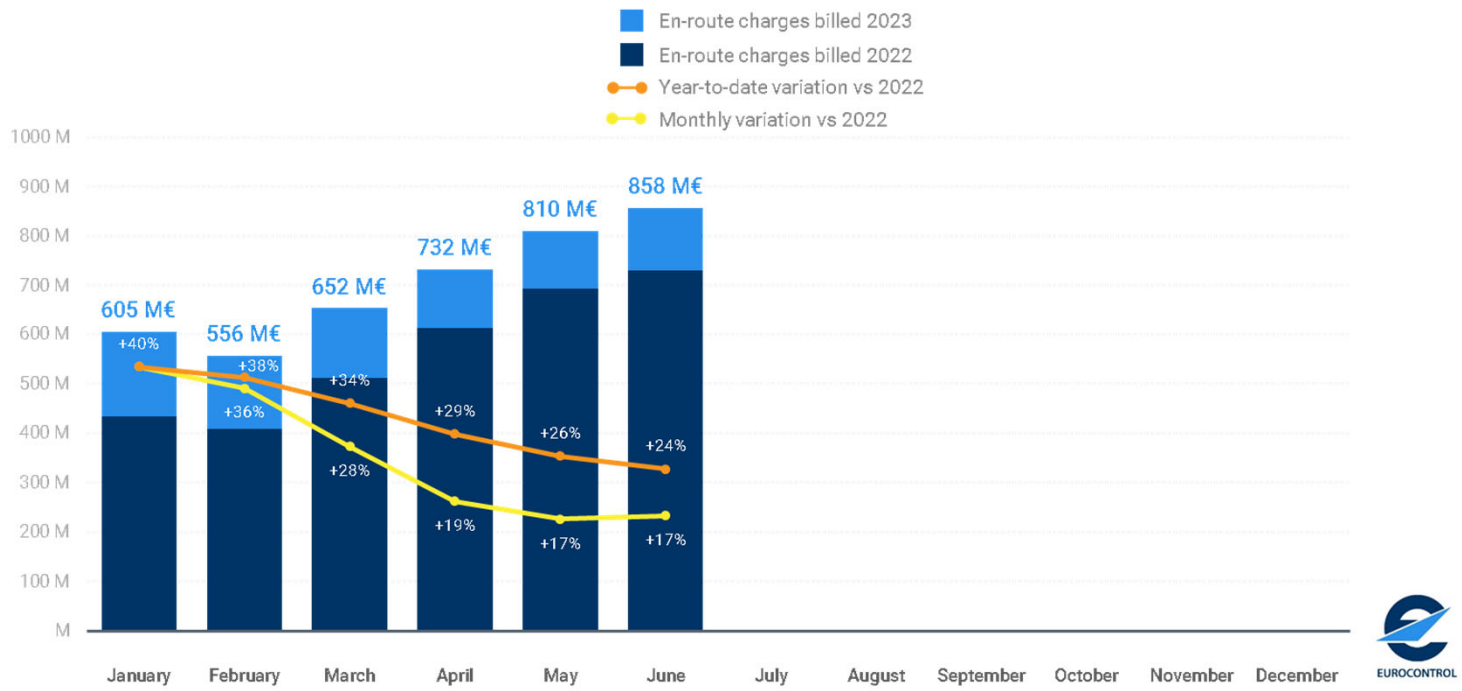


Source: IATA/Platts

- The average price of jet fuel increased to 2.46 USD/gallon on 14 July, an increase of 6% compared to the last Overview, but 23% lower than the beginning of 2023.
- Based on a moving average trend, fuel prices in Europe have been mainly declining since June 2022, from $4/gallon down to $2.20/gallon early June 2023.
- Since then, jet fuel prices are on the rise again after Saudi Arabia started to cut oil production by >1 million barrels/day.

En-route air navigation charges for the EUROCONTROL Area (2023)

Year-to-date amount billed: 4,214 M€ (+24% vs 2022)



- At Network level, 858M€ were billed in June which represents +17% vs 2022 and +15% 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 June 2023 variation vs June 2022 (+17%) is explained by an increase in Unit Rates (+7%) and an increase in Service Units (+12%).
- The high monthly increases in January (+40%) and February (+36%) were artificially inflated by the impact of the Omicron variant of COVID-19, which negatively affected traffic (and thus service units) in early 2022.
- On a year-to-date basis, EUROCONTROL has billed 4,214M€, which is +24% vs 2022.

Supporting European Aviation

EUROCONTROL

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 or 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.

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