AVIATION INTELLIGENCE+

EUROCONTROL

EUROPEAN AVIATION OVERVIEW

09-15 Aug 2023

Thursday 17 August 2023

Headlines

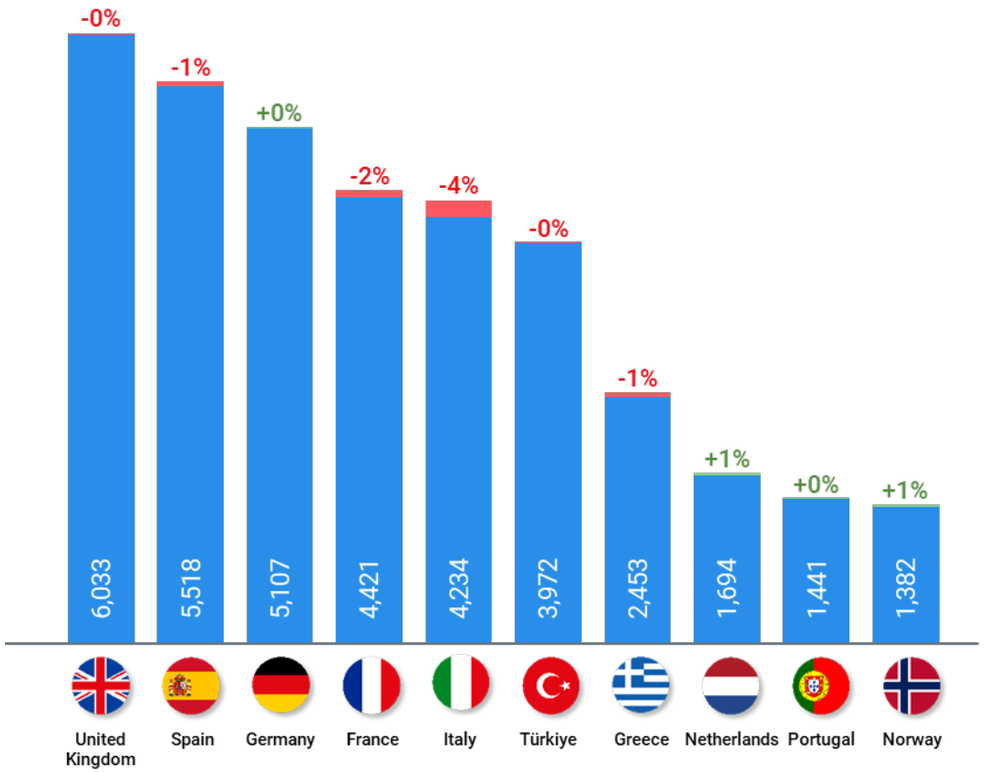
(Week 09-15 Aug 2023)

- The Network recorded 32,420 average daily flights (+7% vs 2022), remaining stable (-0.4%) vs the previous week and standing at 94% of 2019 levels.
- For the first half of August, the number of flights in the Network was 94% of 2019 levels, just below our Base scenario of forecasted flights released in December 2022.
- On average, aircraft operators did not deploy additional capacity over the last week; the top 10 aircraft operators recorded a slight decrease (-0.2%) vs the previous week.
- Arrival and departure punctuality improved, closing at 1.9 and 0.5 percentage points (respectively) above 2019.
- EUROCONTROL billed 929 M€ of en-route charges for July flights, 16% above the amount billed for July 2022 flights. On a year-to-date basis, EUROCONTROL billed 5,144M€ in 2023, +23% compared to 2022, as a result of a combination of more service units and higher unit rates.
- The jet fuel price closed at 3.0 USD/gallon on 11 August 2023, increasing (+8%) over two weeks. Current prices have increased by 5% compared to the beginning of the year.

Top 10 busiest States

On week 09-15 Aug 2023

(all flights incl. overflights compared with previous week)



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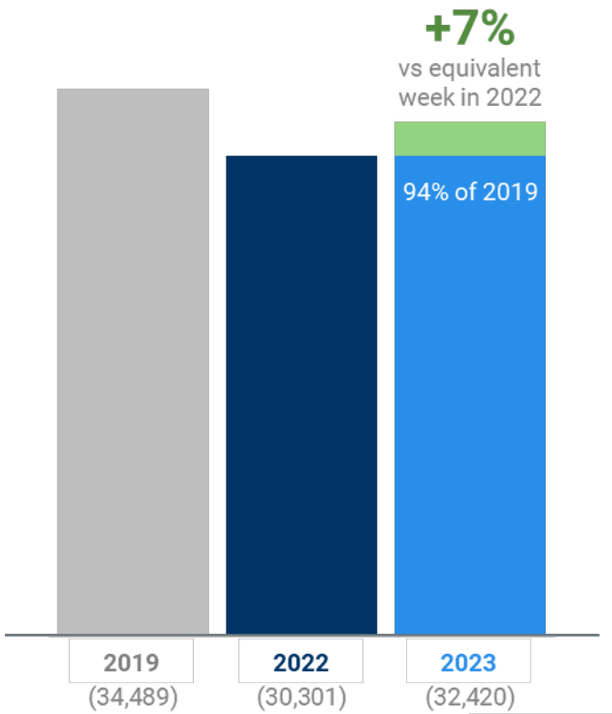
Traffic situation

Average daily flights (including overflights)

Week 09-15 Aug 2023



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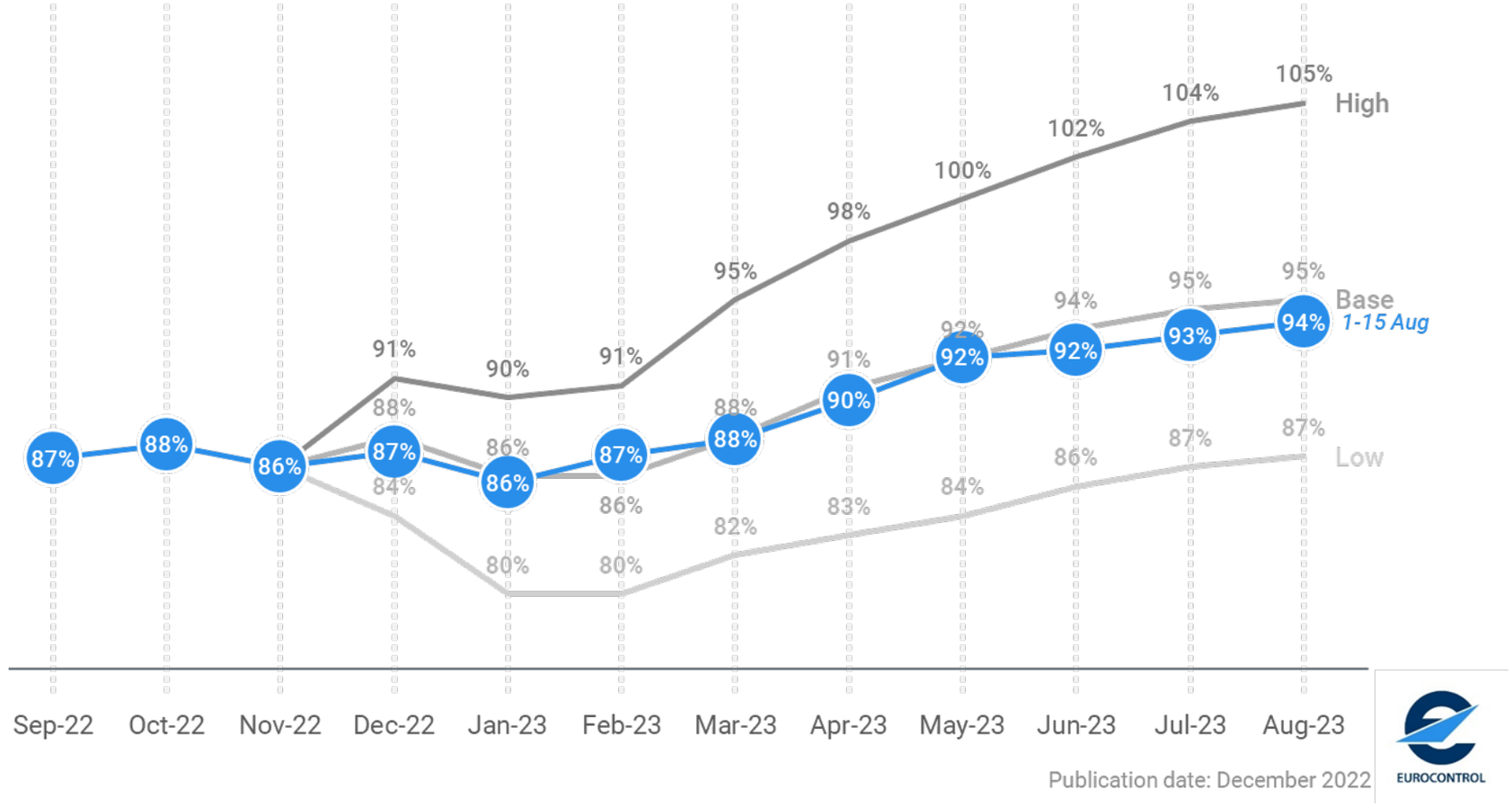
Overall situation compared to the EUROCONTROL Traffic Scenarios

(base year 2019)



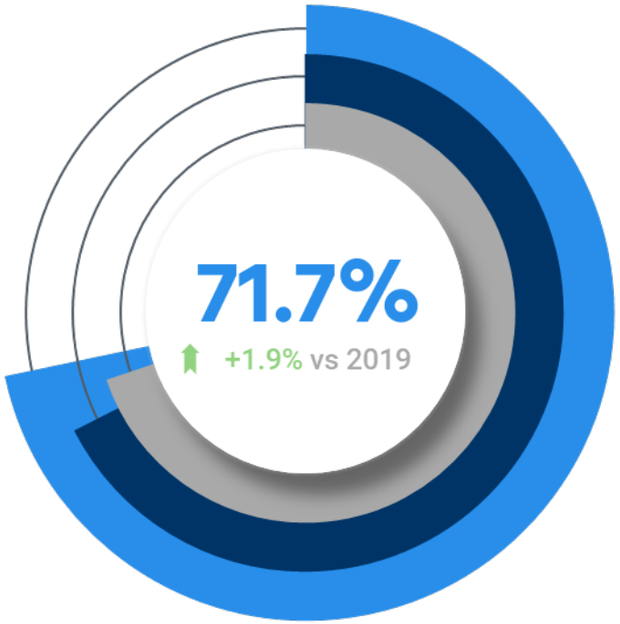
- The latest EUROCONTROL Traffic scenarios were published on 16 December 2022.
- Since that date, Network traffic has evolved largely in line with our Base scenario.
- For the first half of August, flights closed at 94% of August 2019 levels, just below our Base scenario (95%).
- On a year-to-date basis, Network traffic is at 90% of 2019, and +12% vs 2022

Arrival & departure punctuality

(at top airports for the last week)

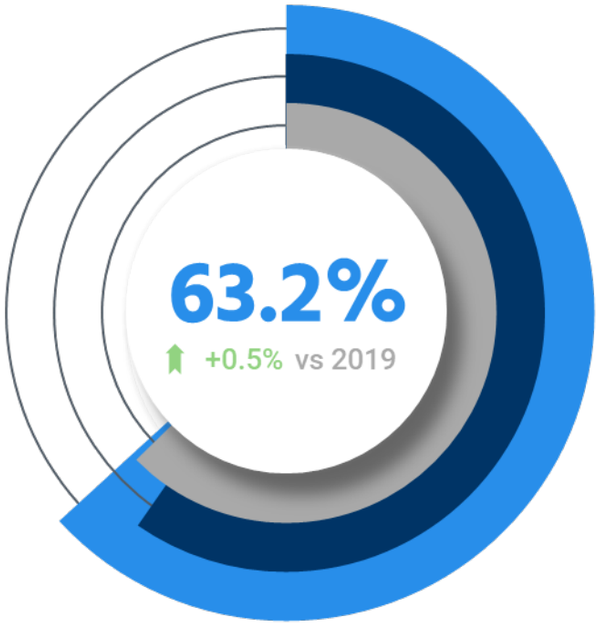
Week 09-15 Aug 2023

ARRIVAL PUNCTUALITY



69.8% _____ in 2019
67.5% _____ in 2022

DEPARTURE PUNCTUALITY



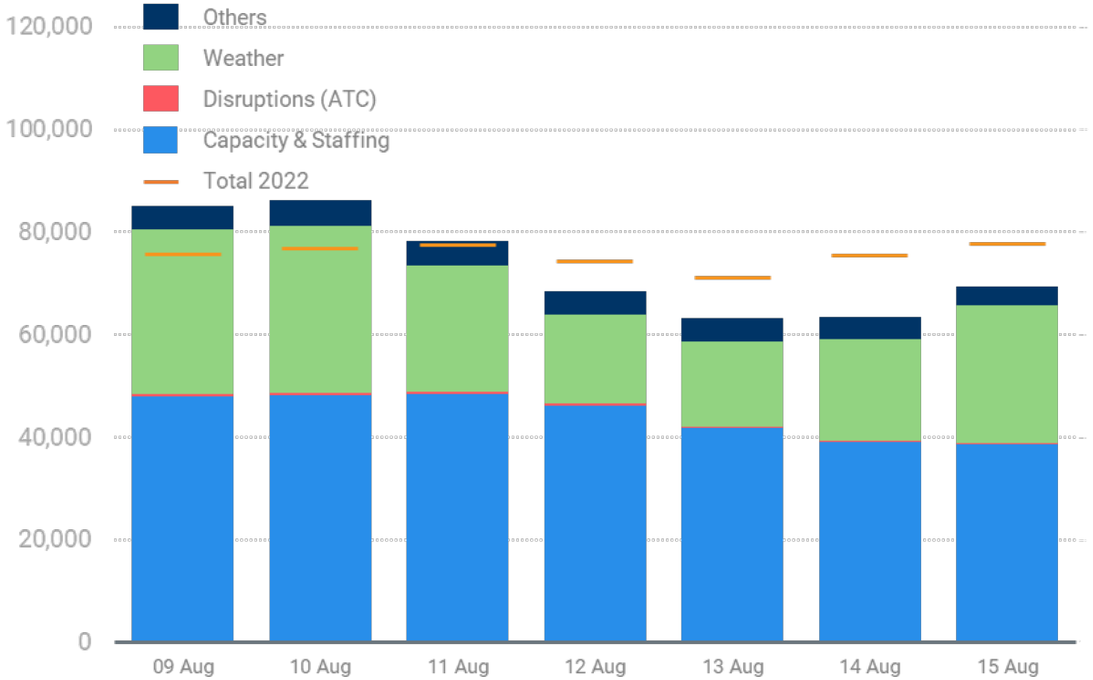
62.7% _____ in 2019
59.7% _____ in 2022

- Network punctuality was better than the equivalent week in 2019, with arrival punctuality at 71.7% and departure punctuality at 63.2%, increasing by 1.9 and 0.5 percentage points. This was also a larger improvement compared to the same period in 2022.
- Overall network performance was better than previous weeks, although seasonal weather (mainly thunderstorm activity (CBs)) continued to impact en-route delays. Regarding airports, Tel-Aviv experienced delays due to combinations of ATC capacity and ATC equipment related regulations. Lisbon continues to suffer from daily ATC capacity delays. Istanbul iGA saw delays from CBs on 10 August. Lanzarote and Fuerteventura airports were affected by ATC industrial action. Greek island airports were affected by ATC and aerodrome capacity delays throughout the week., Finally London Gatwick saw better performance with fewer capacity delays.

En-route ATFM delays

Delays per cause (EUROCONTROL Area)

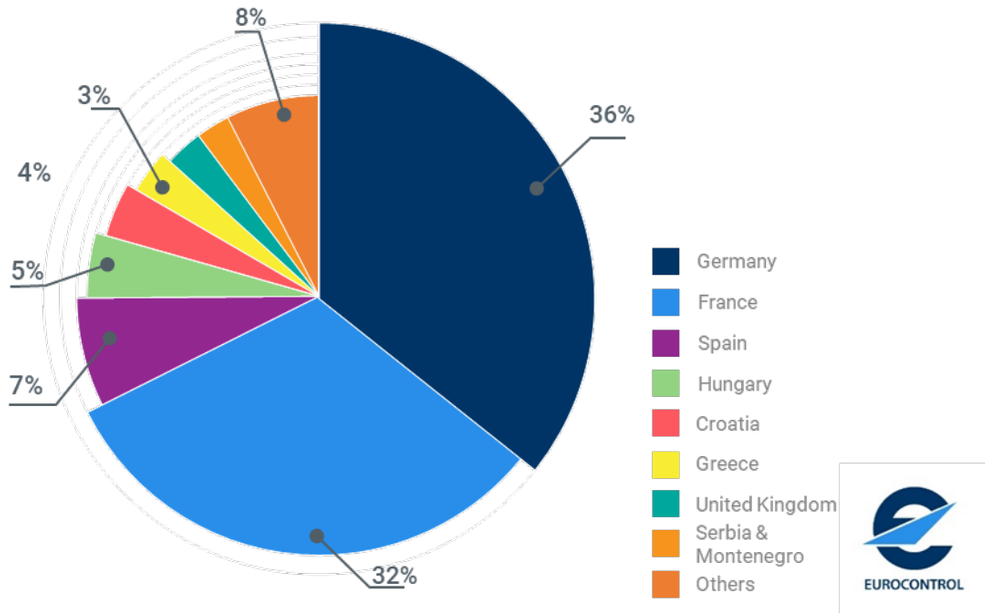
In minutes (7-day average) in 2023



- For the period 09-15 August, en-route ATFM delays delays were in line with, or even below, the 2022 levels (7-day average shown in graph).
- On average, they amounted to 69,300 minutes a day, with the main causes being capacity & staffing and weather.

Share of en-route ATFM delays

Week 09-15 Aug 2023



- Germany accounted for 36% of all en-route ATFM delays, mainly concentrated in the Karlsruhe and Munich ACCs.
- France came second with 32% of all en-route ATFM delays, mainly concentrated in the Marseille and Reims ACCs.
- Spain came third with 7% of all en-route ATFM delays, mainly concentrated in the Barcelona ACC.

Top 10 States

Departures and arrivals

Week 09-15 Aug 2023

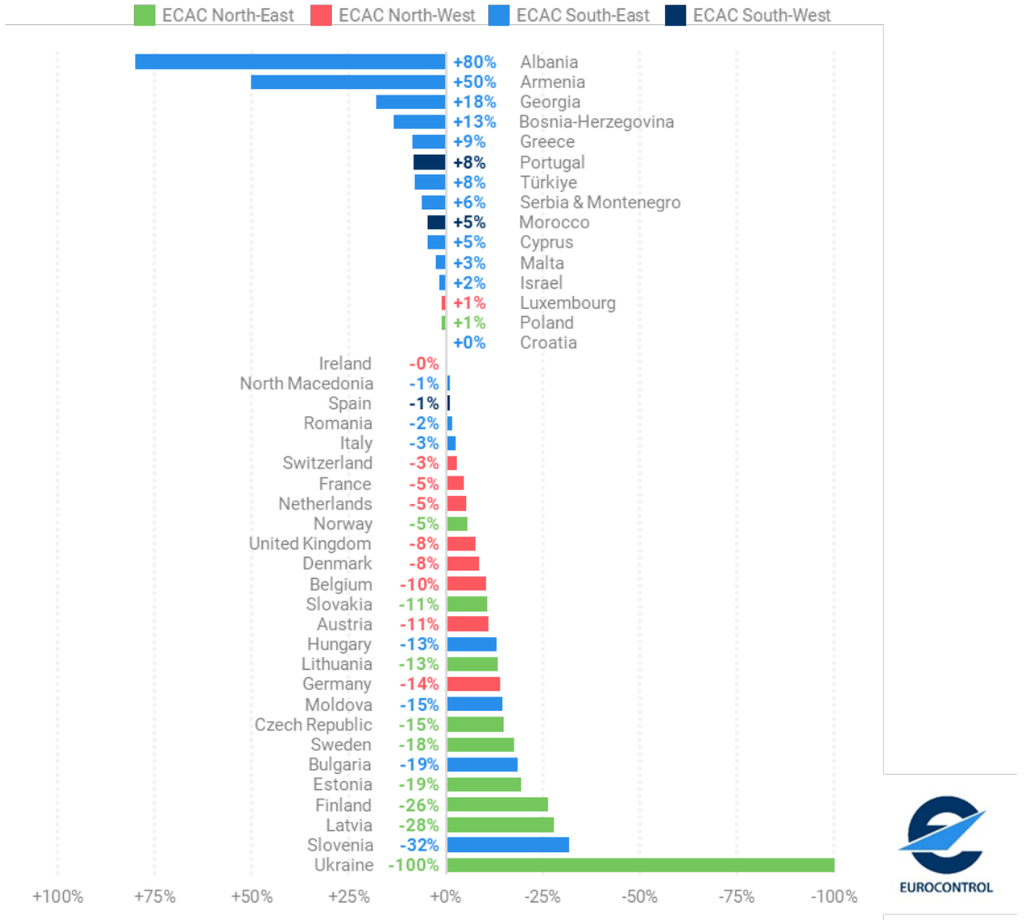
No.	Country	Average daily flights	% prev week	% prev year	% 2019
1.	United Kingdom	6,033	-0%	+9%	-8%
2.	Spain	5,518	-1%	+6%	-1%
3.	Germany	5,107	+0%	+5%	-14%
4.	France	4,421	-2%	+5%	-5%
5.	Italy	4,234	-4%	+7%	-3%
6.	Türkiye	3,972	-0%	+11%	+8%
7.	Greece	2,453	-1%	+3%	+9%
8.	Netherlands	1,694	+1%	+8%	-5%
9.	Portugal	1,441	+0%	+9%	+8%
10.	Norway	1,382	+1%	+0%	-5%

- The top 10 States recorded a slightly lower number of flights compared to the previous week (-0.8%).
- Italy recorded a decrease of 4% as a result of lower domestic flows.
- Three States within the top 10 are now recording growth above 2019 (Türkiye, Greece and Portugal) while Spain is relatively close to their pre-COVID levels. The six remaining States are still between 14% and 5% below 2019 levels.
- Compared to 2019 (right-hand side graph), States located in the South-Eastern part of Europe are growing at a higher pace than the others.

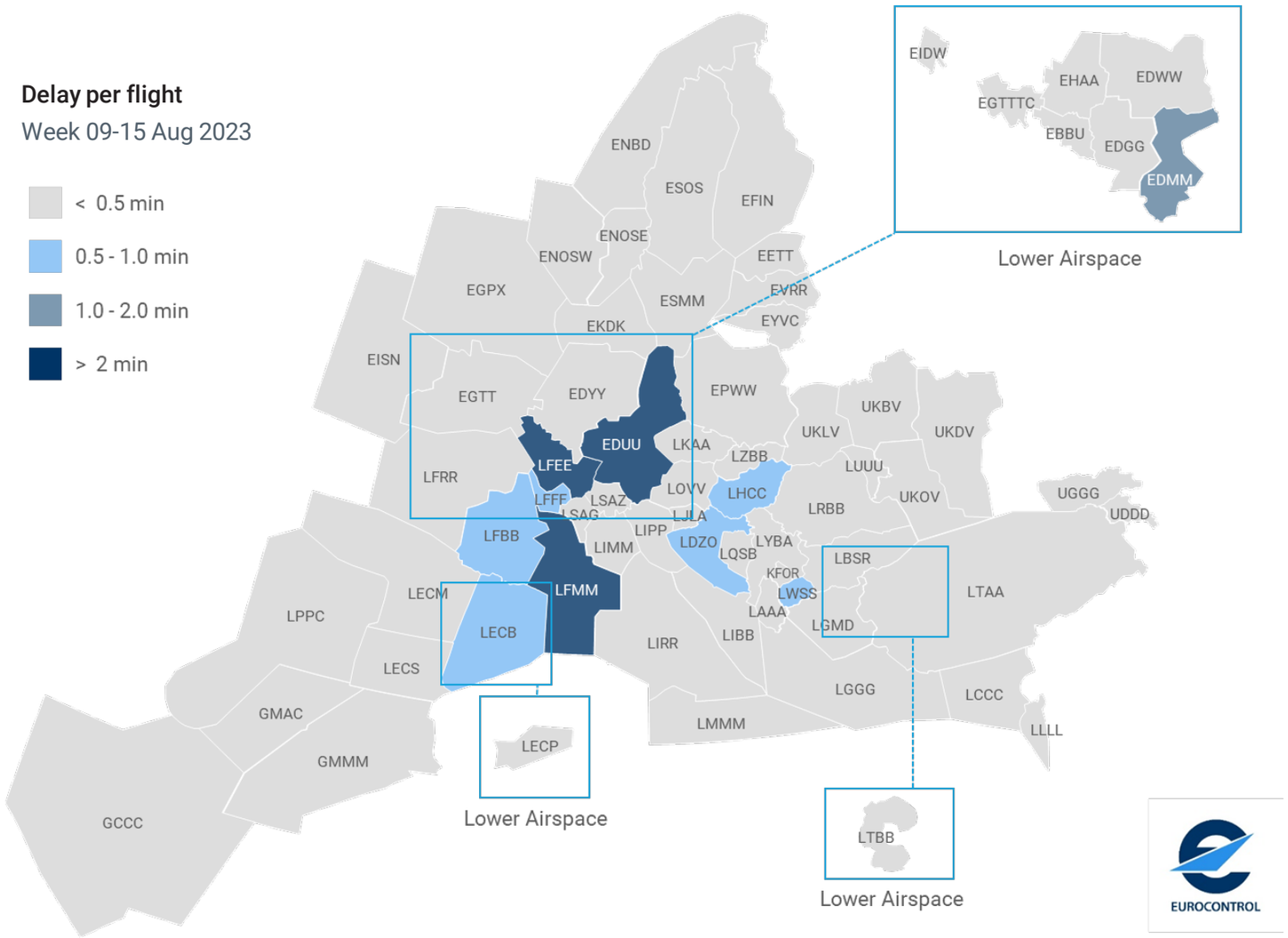
States in the EUROCONTROL Network

Compared to the equivalent week in 2019

Dep/Arr flights for week 09-15 Aug 2023



En-route ATFM delayed flights per Area Control Centre



- Over the last week, en-route ATFM delays have decreased by 24% compared to the week before and are below 2022 levels (69,300 minutes per day, on average).
- Compared to the same week in 2022, en-route ATFM delays were 11% lower this year.
- Last week, the most affected ACCs were:
  - Karlsruhe (3.4 min/flight), owing to ongoing ATC capacity and weather issues, as well as minor delays due to military activity,
  - Reims (2.9 min/fl.) and Marseille (2.0 min/fl.), owing to capacity and staffing issues, as well as weather issues during the week-end,
  - Munich (1.5 min/fl.), owing to system implementation and weather issues,
  - Zagreb (0.9 min/fl.), owing to ongoing capacity issues,
  - Budapest (0.9 min/fl.), due to capacity issues as well as increased traffic due to the Ukrainian Crisis, and;
  - Barcelona (0.8 min/fl.)
  - Overall, Germany was responsible for 36% of all en-route ATFM delays last week, followed by France (32%) and Spain (7%).

Top 10 aircraft operators

Week 09-15 Aug 2023 (avg daily flights)

No.	Aircraft operator	Average daily flights	% prev week	% prev year	% 2019
1.	Ryanair Group	3,351	-0%	+11%	+27%
2.	easyJet Group	1,797	+1%	+9%	-5%
3.	Turkish Airlines	1,633	-1%	+10%	+8%
4.	Lufthansa Airlines	1,226	-2%	+2%	-18%
5.	Air France Group	1,071	+0%	+0%	-8%
6.	Wizz Air Group	937	+0%	+14%	+37%
7.	KLM Group	904	-0%	+17%	-4%
8.	British Airways Group	847	+0%	+21%	-11%
9.	Vueling	701	-0%	-2%	-5%
10.	Eurowings Group	631	+0%	+13%	-15%

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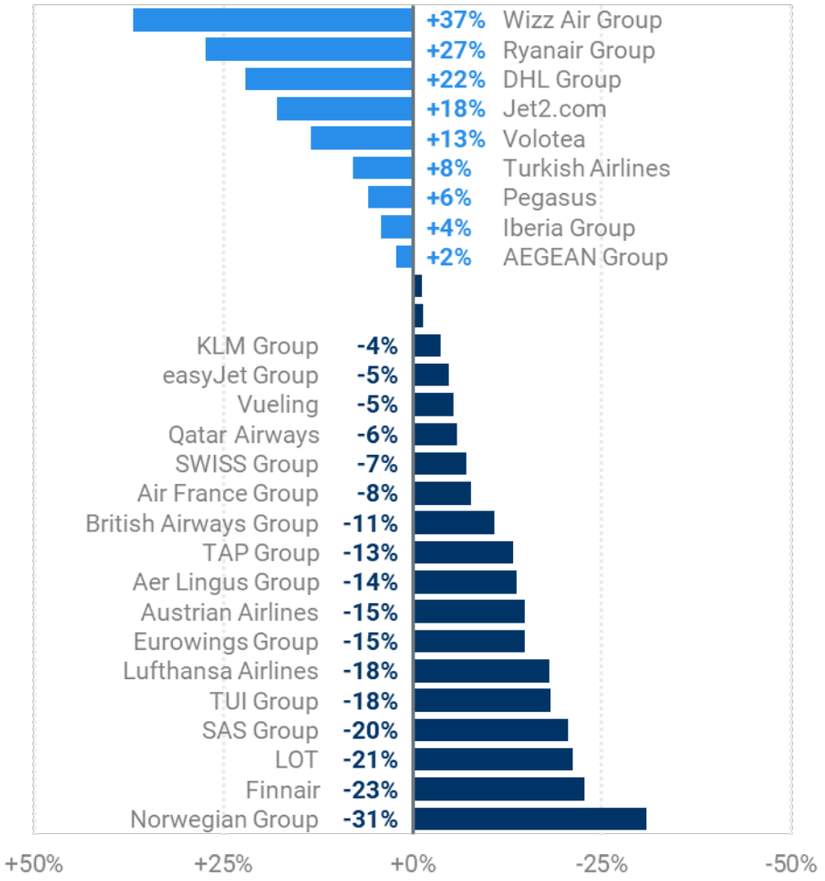
- The top 10 aircraft operators posted a slight decrease in the number of flights (-0.2% on average) compared to the previous week.
- Last week, Eurowings entered the top 10 while SAS exited (reduced number of flights on Norway ↔ Spain, Denmark ↔ Greece, Denmark ↔ Spain).
- Last week, easyJet added flights (+1%) to the network, in particular on domestic flows in the UK, as well as flows UK ↔ Netherlands or UK ↔ Germany.
- Three airlines within the top 10 are flying well above their 2019 flight levels: +37% (Wizz Air Group), +27% (Ryanair Group) and +8% (Turkish Airlines).

Aircraft operators in the EUROCONTROL Network

Compared to the equivalent week in 2019
Dep/Arr flights for week 09-15 Aug 2023



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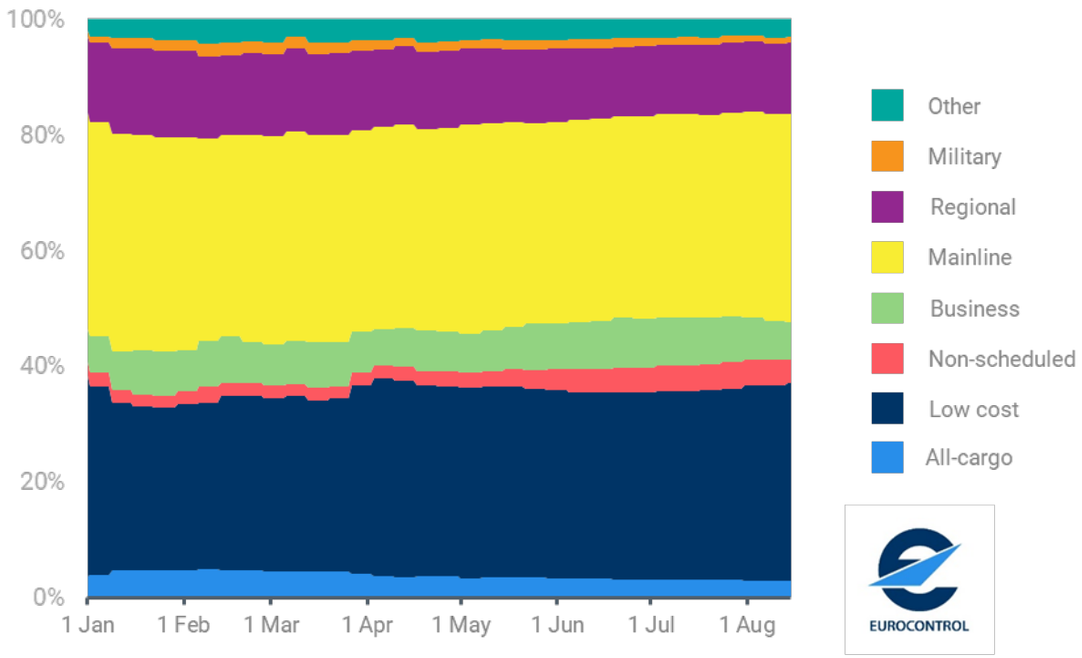
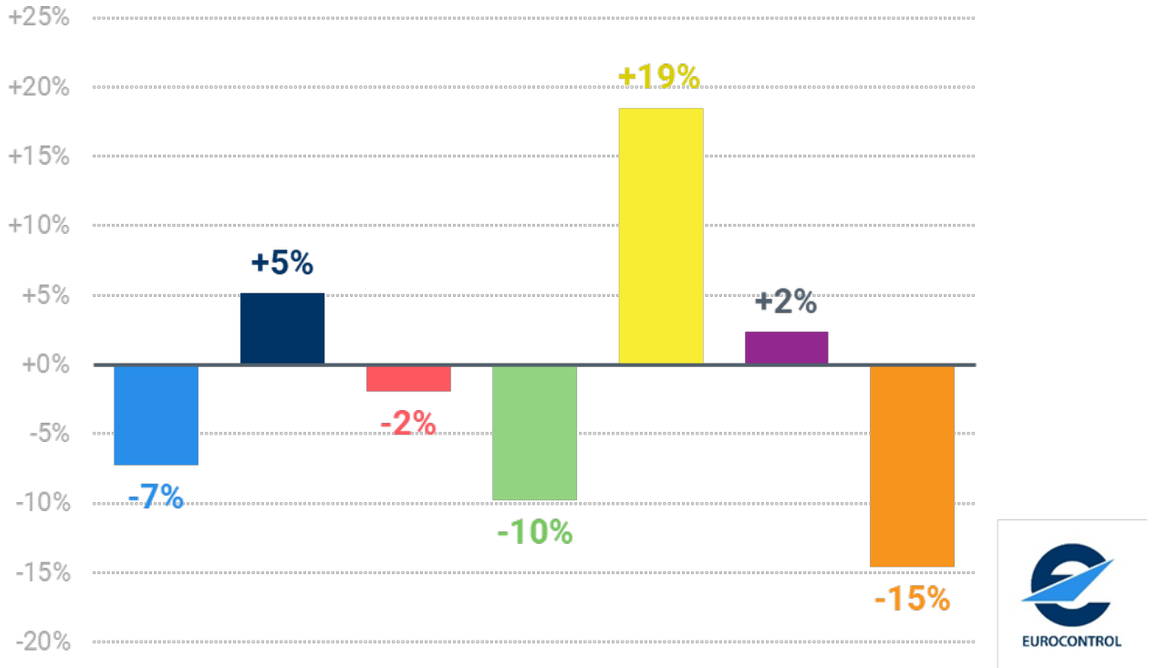
Market segments in the EUROCONTROL Network

7-day average share of total flights



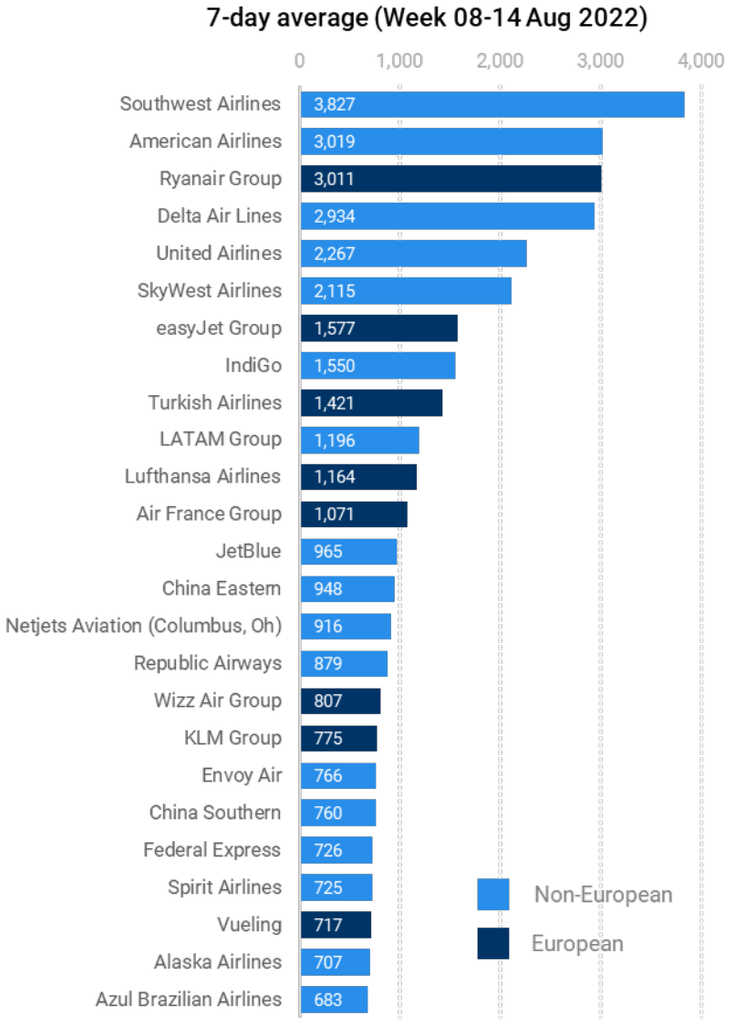
Week 09-15 Aug 2023 (vs 2022)

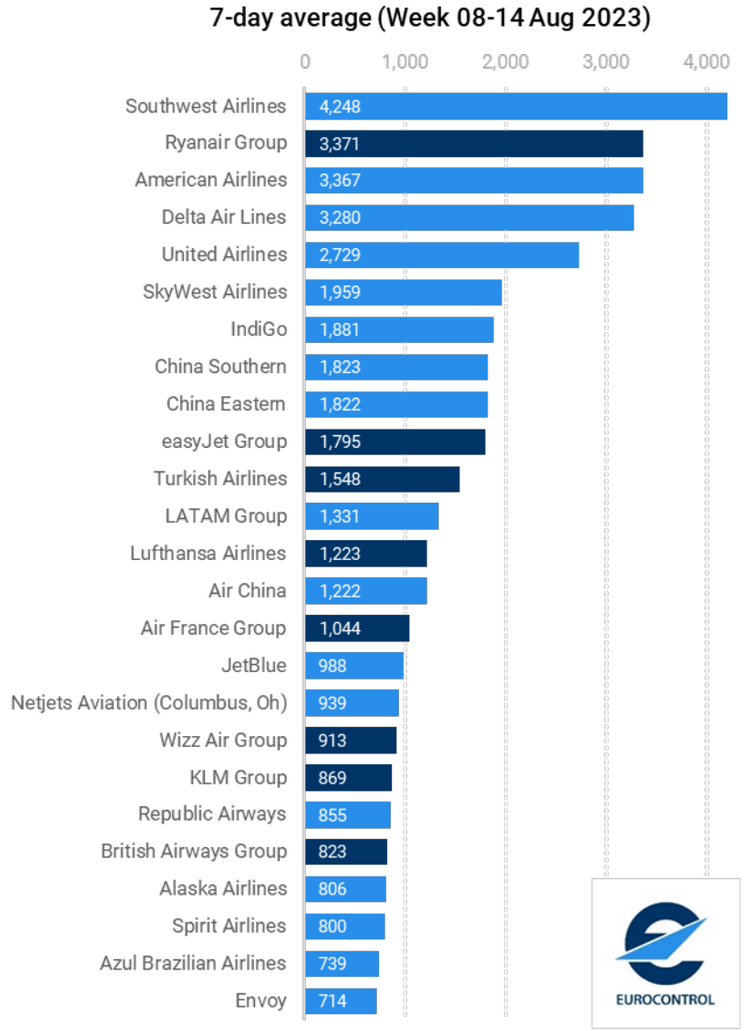


- Compared to 2022, the Mainline (+19%), Regional (+2%), and Low-cost (+5%) sectors are recording growth, reflecting their continuing recovery since the COVID-19 outbreak owing to pent-up demand and the summer season.
- Business aviation (-10%) and All-cargo (-7%) are now recording fewer flights in 2023 compared to 2022 levels. The All-cargo market share has now stabilised (a market share of 2.9% of all flights for the first half of August 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 (6.9% of total flights for the first half of August 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 August 2023, recorded fewer flights (-2%) during the week 09 – 15 August 2023, compared to the same week in 2022.

Top 25 global aircraft operators

(average daily departure flights)



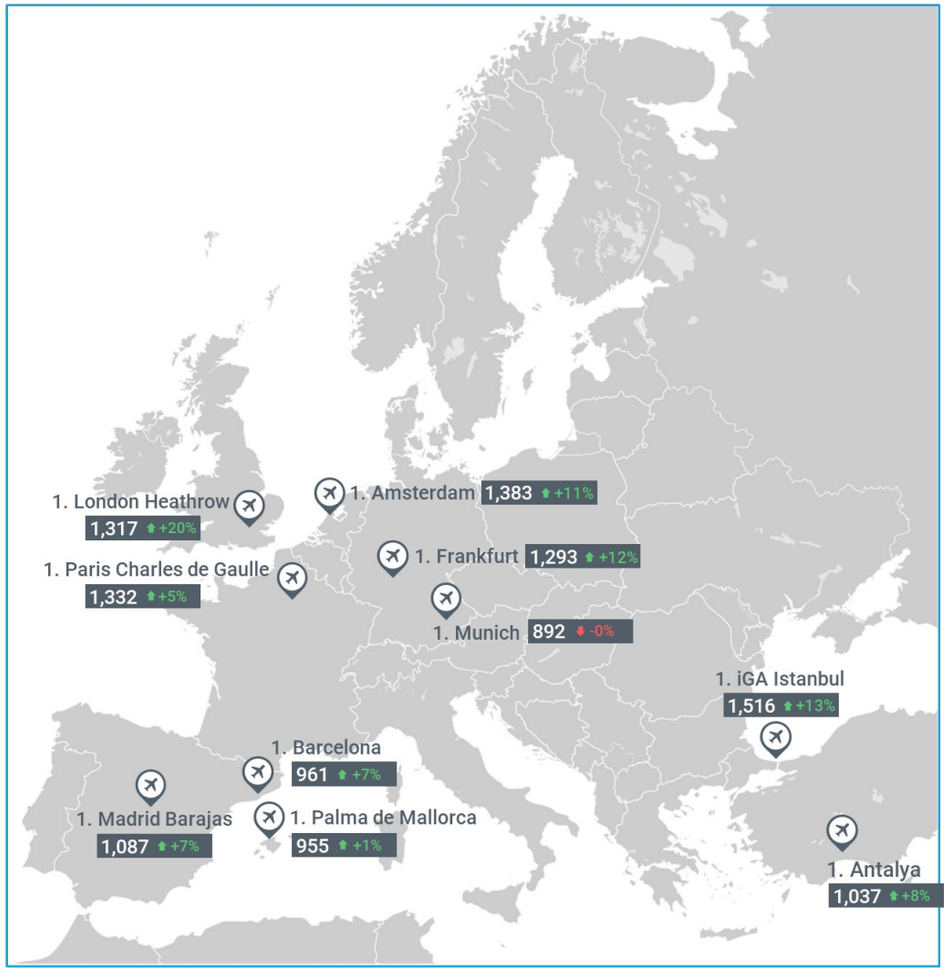


Source: Flightradar24 Historical Global Utilisation data

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 2nd globally and ranked one place higher than two weeks ago.
- The other European airline in the top 10 is easyJet (10th).
- Five more airlines make the top 20: Turkish Airlines (11th), Lufthansa (13th), Air France (15th), Wizz Air (18th), KLM (19th).
- British Airways, which was not in the top 25 in 2022, was 21st this year.
- Vueling was ranked 23rd in 2022 but is not in the top 25 this year.

Top 10 airports



Airport ranking

Week 09-15 Aug 2023 (vs 2019)

No.	Airport	Avg. daily dep/arr flights	vs 2022	vs 2019
1.	iGA Istanbul	1,516	+13%	+15%
2.	Amsterdam	1,383	+11%	-7%
3.	Paris Charles de Gaulle	1,332	+5%	-12%
4.	London Heathrow	1,317	+20%	-2%
5.	Frankfurt	1,293	+12%	-13%
6.	Madrid Barajas	1,087	+7%	-9%
7.	Antalya	1,037	+8%	+8%
8.	Barcelona	961	+7%	-9%
9.	Palma de Mallorca	955	+1%	+2%
10.	Munich	892	-0%	-22%

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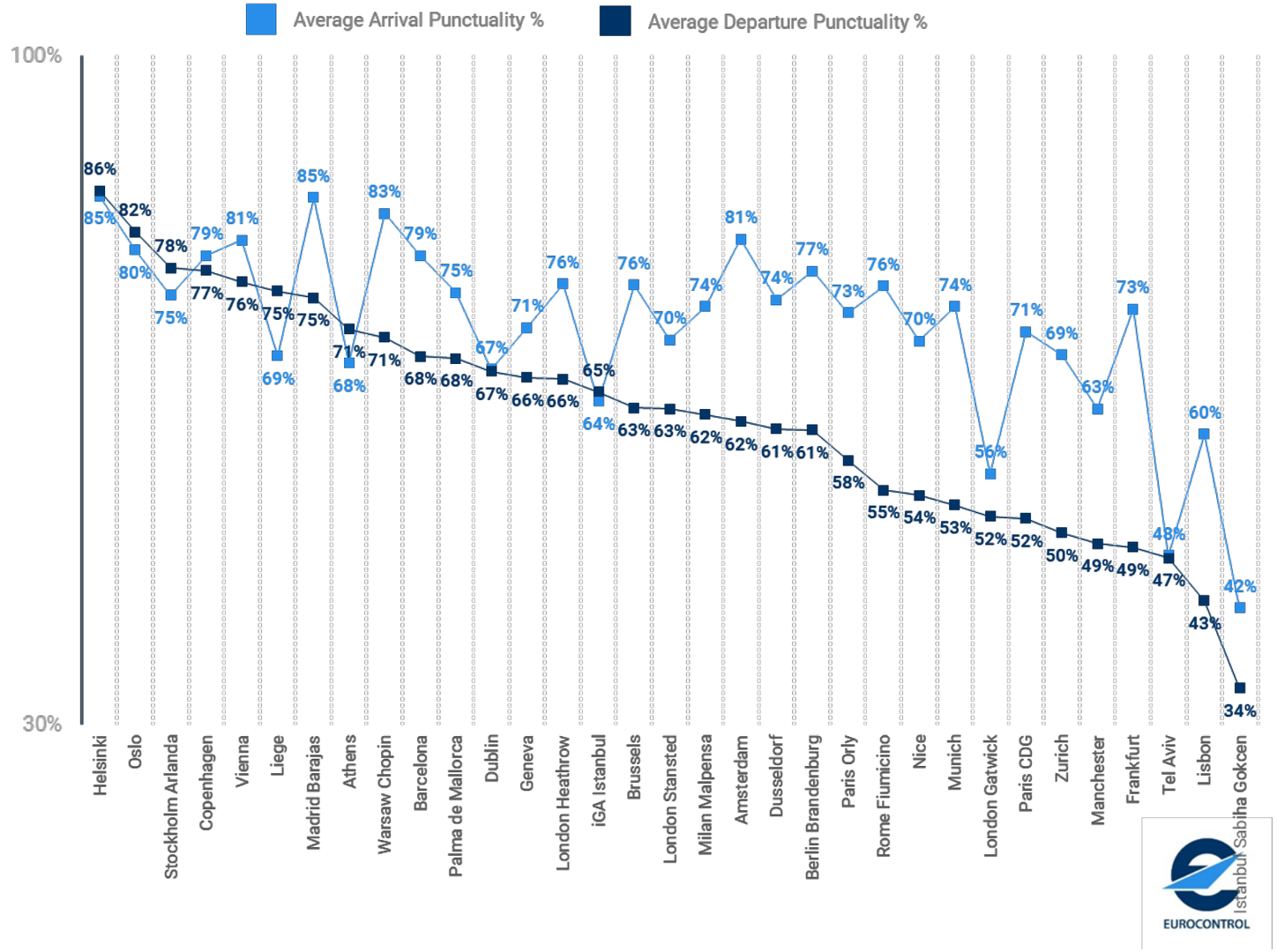
- No changes in the ranking compared to the previous edition.
- All but one airport experienced sustained growth vs 2022, ranging from +1% (Palma de Mallorca) to +20% (London Heathrow).
- Three top 10 airports – iGA Istanbul, Antalya and Palma de Mallorca – are currently handling traffic above their 2019 levels.

Average arr/dep punctuality at main airports

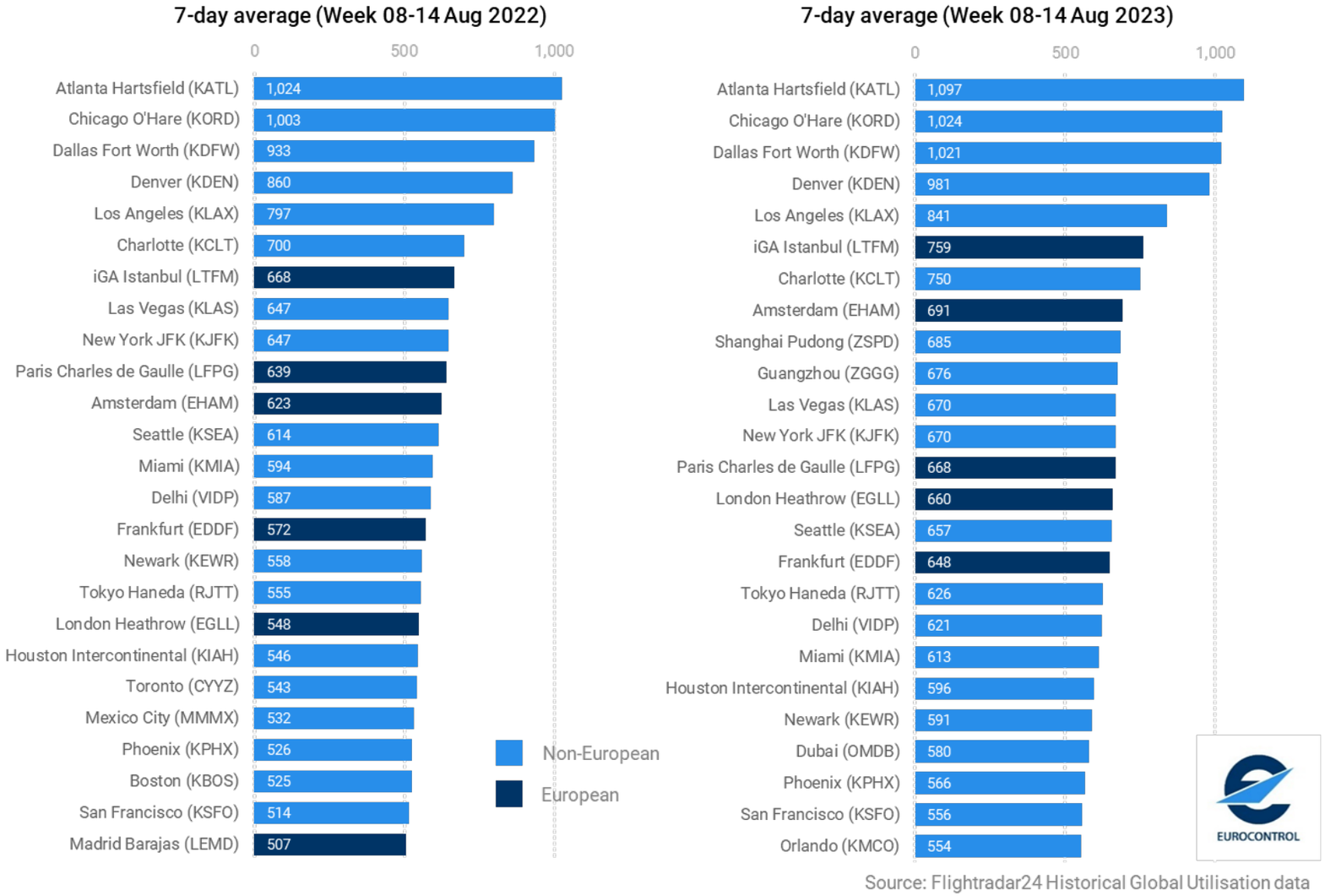
(Week 09-15 Aug 2023)



- 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 Helsinki, Oslo, Stockholm, Liège, Athens and iGA Istanbul 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

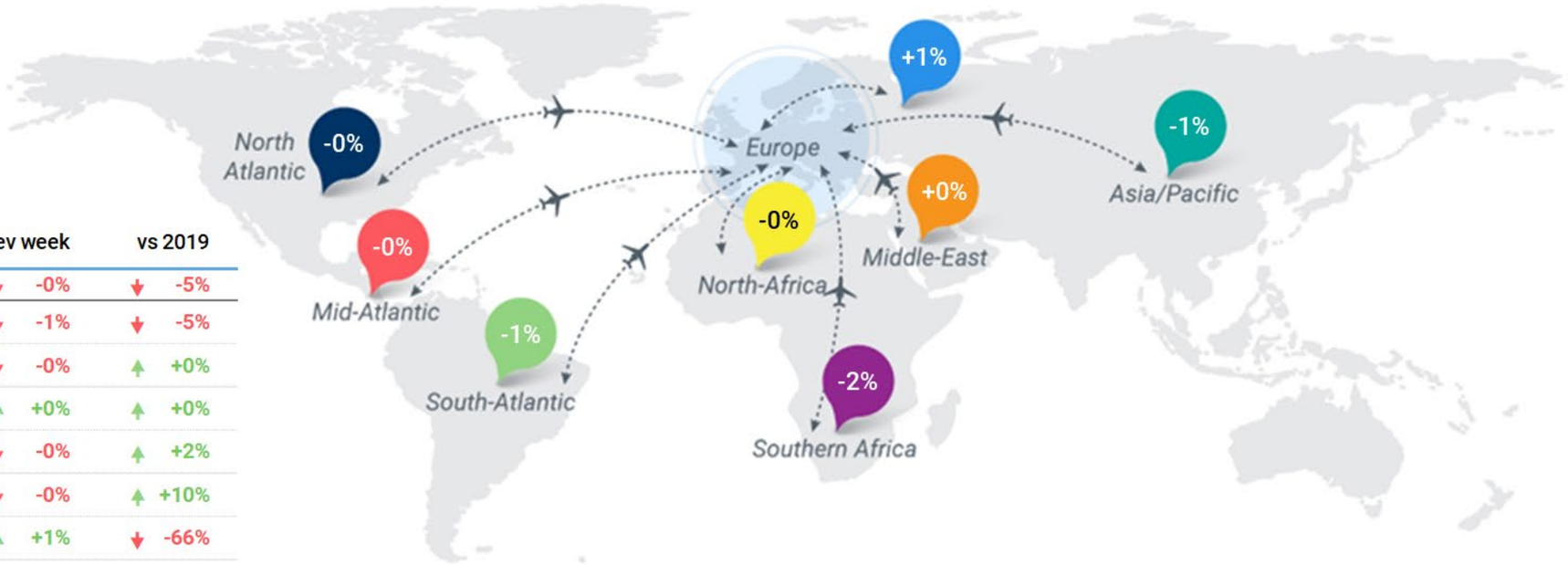
Over the last week

- Five European airports are ranked in the top 25 of global airport departures (one fewer than in 2022).
- The highest ranked European airport (6th) is iGA Istanbul Airport, now one place ahead of 2022.
- The other European airports in the top 25 are Amsterdam (8th), Paris CDG (13th), London Heathrow (14th), and Frankfurt (16th).
- Madrid is no longer in the top 25 ranking (though it was in 2022).
- The first Chinese airport to make the 2023 list is Shanghai (9th), with none appearing in the top 25 a year ago.

Traffic flows

(average daily departure/arrival flights for week 09-15 Aug 2023)

Region	Average daily flights	vs prev week	vs 2019
Intra-Europe	25,216	-0%	-5%
Europe ↔ Asia/Pacific	781	-1%	-5%
Europe ↔ Mid-Atlantic	173	-0%	+0%
Europe ↔ Middle-East	1,743	+0%	+0%
Europe ↔ North Atlantic	1,462	-0%	+2%
Europe ↔ North-Africa	1,324	-0%	+10%
Europe ↔ Other Europe	444	+1%	-66%
Europe ↔ South-Atlantic	177	-1%	-10%
Europe ↔ Southern Africa	286	-2%	-8%
Non Intra-Europe	6,391	-0%	-11%



- The main traffic flow was intra-European with 25,216 daily flights last week, in line with the previous week levels. Intercontinental flows recorded 6,391 daily flights on average last week, also in line with the previous week.
- The second-largest regional flow is between Europe and the Middle East: 1,743 average daily flights last week, almost unchanged from the previous week.
- The third flow is to/from North America with 1,462 daily flights, stable on the previous week's value.
- The fourth flow is to/from North Africa, with 1,324 flights per day, stable on previous week's value.
- Flows with Other Europe (including the Russian Federation) remain massively reduced at -66% compared to 2019.
- Flows between Europe and Asia/Pacific are still lagging behind, to a lesser extent, now only -5% compared to 2019. European flows with China and Hong Kong were at 213 daily flights last week (25% below August 2019 levels).

Top 10 long-haul country pairs

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

Week 09-15 Aug 2023

No.	Country pair	Average daily flights	% prev week	% prev year	% 2019
1.	UK ↔ US	329	+2%	+20%	+3%
2.	Germany ↔ US	170	-1%	+9%	+2%
3.	France ↔ US	140	+3%	+16%	+7%
4.	Italy ↔ US	98	-3%	+24%	+11%
5.	Netherlands ↔ US	76	-2%	-5%	-14%
6.	Ireland ↔ US	73	-0%	+14%	+4%
7.	Spain ↔ US	72	-5%	+5%	-8%
8.	UAE ↔ UK	56	-5%	+11%	-17%
9.	Canada ↔ UK	48	+1%	-4%	-14%
10.	Canada ↔ France	46	+1%	+18%	+13%

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- Since the last edition, there have been few changes in the rankings for the top 10 long-haul country pairs: Spain ↔ US and Ireland ↔ US have swapped places.
- Only four flows posted an increase vs the previous week (ranging from +1% 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 two flows posted an increase on the same week in 2022.
- Six flows are currently above 2019 levels (UK ↔ US, Germany ↔ US, France ↔ US, Italy ↔ US, Ireland ↔ US and Canada ↔ France).

Economics

Week 09-15 Aug 2023

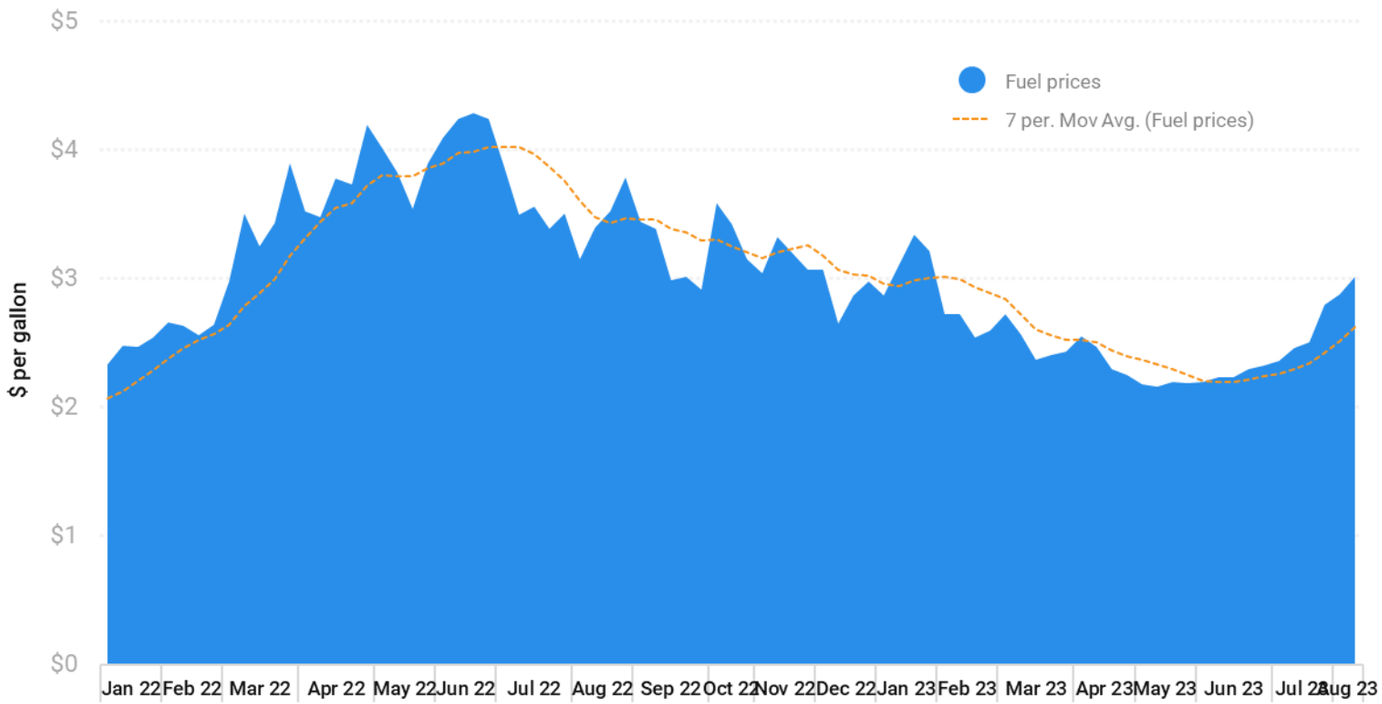
11 Aug 2023
avg fuel price:

$3.01 /gallon

8%
vs. $2.80 /gallon
on 28 Jul 2023

Source: IATA/Platts

Jet fuel price (Europe)

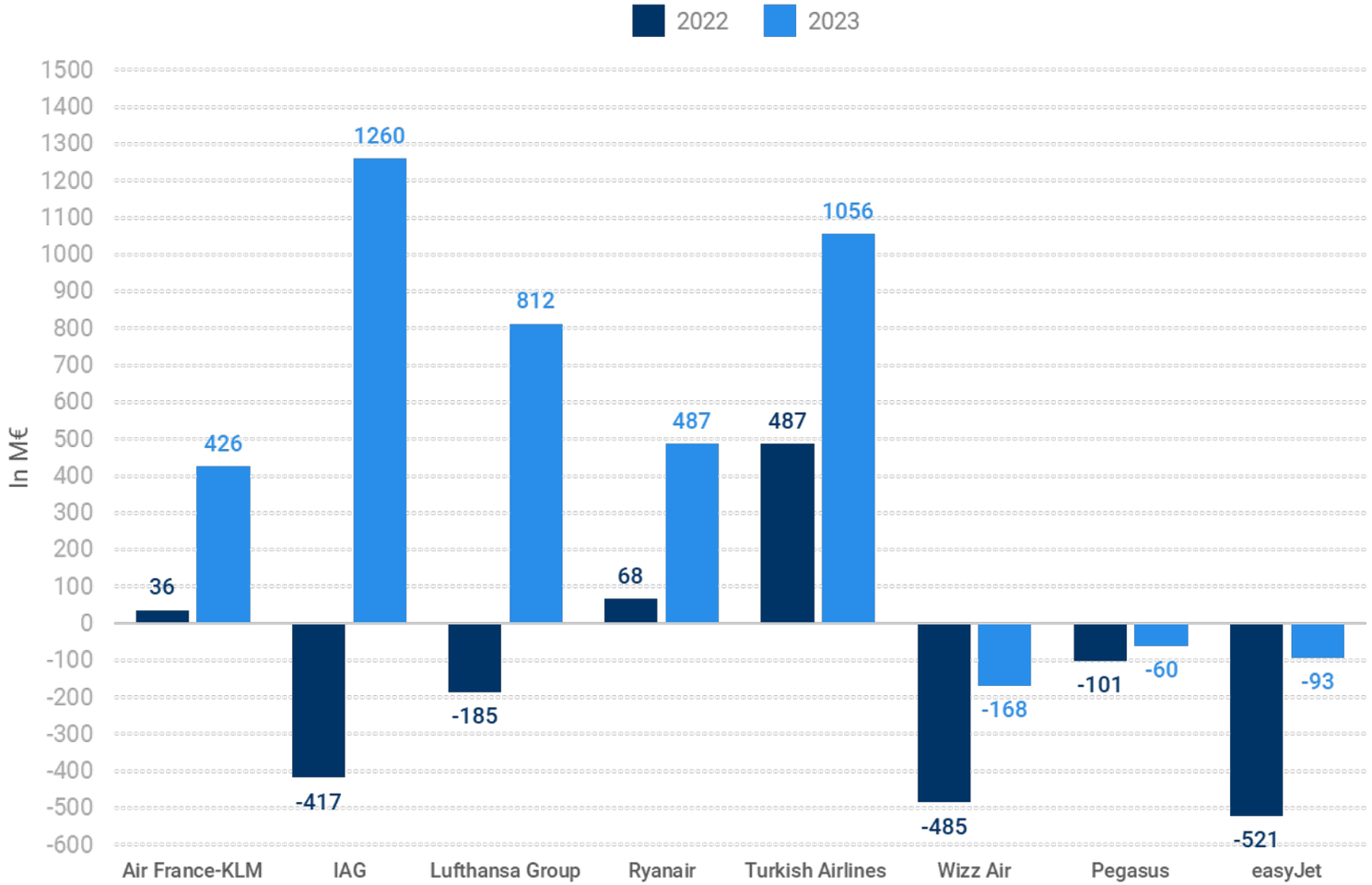


Source: IATA/Platts

- The average price of jet fuel increased to 3.01 USD/gallon on 11 August, an increase of 8% compared to the last Overview, and 5% higher than the beginning of 2023.
- Based on a moving average trend, fuel prices in Europe had 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.

Operating profits of airlines

In M€ in 2023 and 2022



AFR-KLM, IAG, Ryanair, Turkish Airlines, Wizz, Pegasus: operating profits, Lufthansa: adjusted EBIT, easyJet: headline PBT. SAS: N/A

Source: Company reports

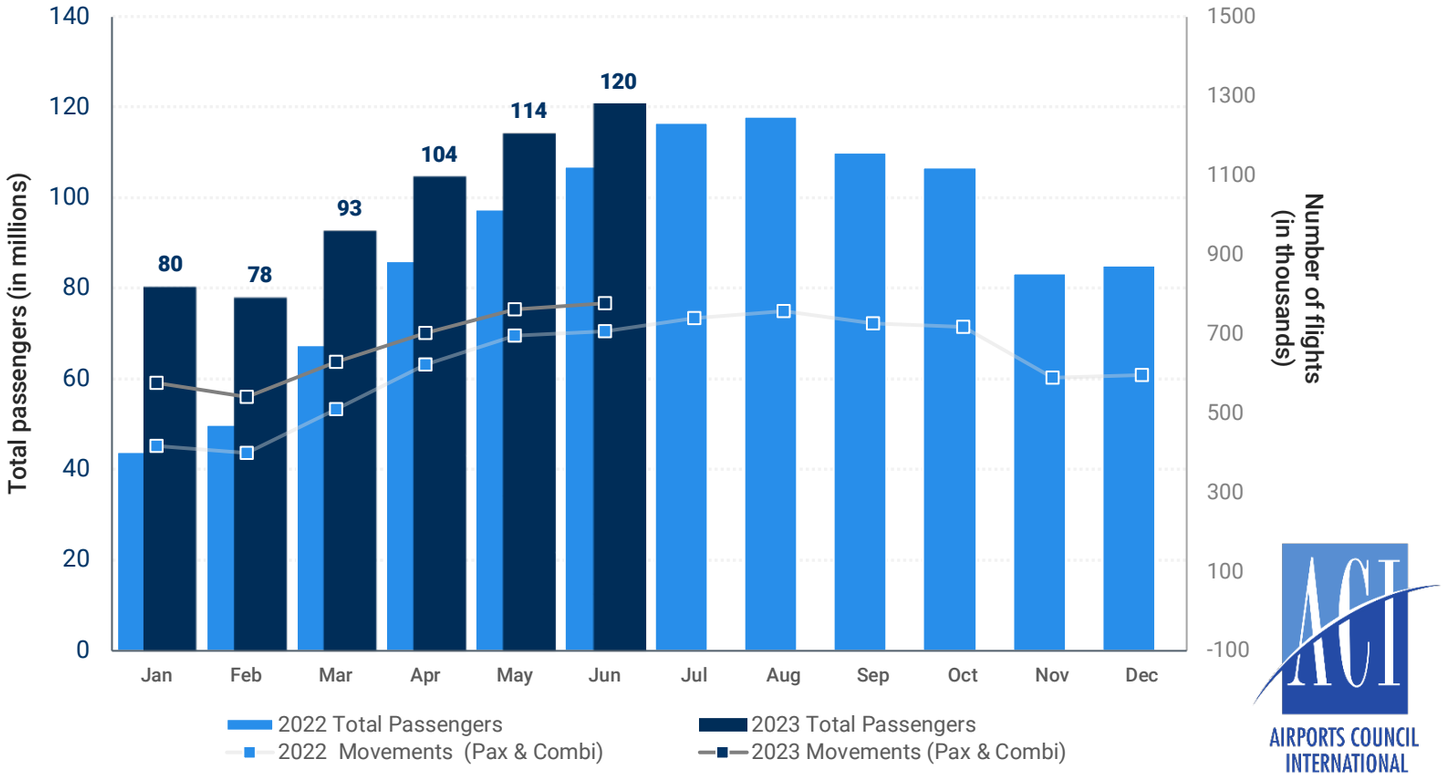
During the first half of 2023 (H1), and compared to the first half of 2022:

- Unsurprisingly, all airlines/airline groups in this top 8 managed to improve their results during H1 2023, compared to the same period last year. Indeed, results during H1 2022 were distorted by the impact of Omicron variant's wave and the staff shortages impeding the restart of operations after the outbreak.
- Although not shown on this graph, all top 8 airlines recorded profits from operations during the second quarter of 2023.
- All but 3 airlines in this top posted profits during H1 2023:
  - IAG group has recorded the highest operating profits for the semester (+1,260 M€), owing to sustained strong demand and particular outperformance from its Spanish businesses.
  - Turkish Airlines recorded high profits too (+1,056 M€), by responding to the strong international demand ; it carried 22% more passenger than during first half of 2022.
  - Lufthansa Group recorded 812 M€, highlighting its 'stability' strategy towards reliable flight operations.
  - Airlines considered in this sample recorded 3.9 Bn€ profits in H1 2023, a massive improvement on H1 2022 losses (-1.2 Bn€).

Top 40 European airports: passengers

Number of passengers and flights per month

Passengers and flights at ECAC top 40 Airports



AIRPORTS COUNCIL INTERNATIONAL

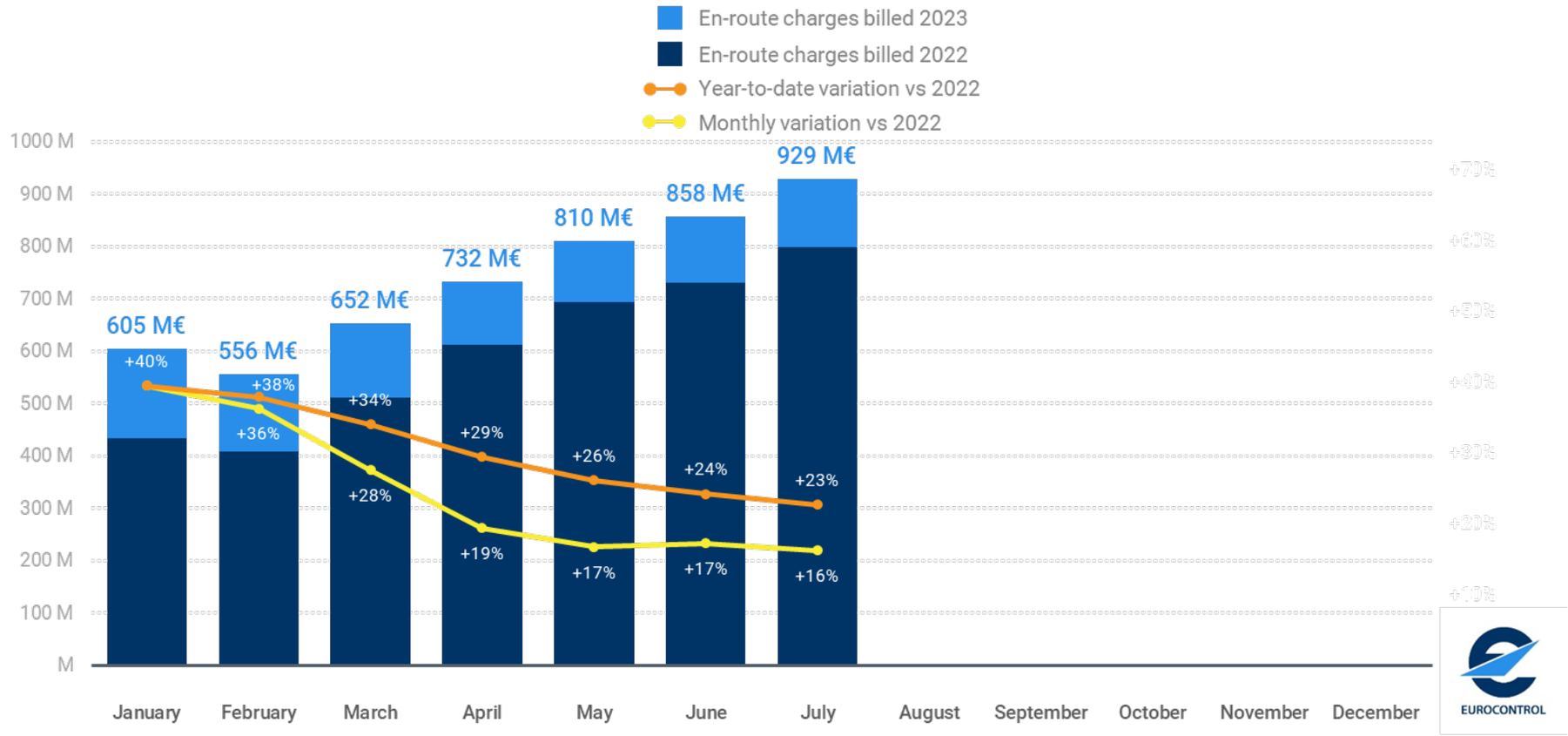
Based on ACI passenger data, the total number of passengers and corresponding aircraft movements for the top 40* ECAC airports show:

- 120 million passengers were recorded in June 2023, corresponding to a 13% growth (vs June 2022), while corresponding movements increased by 10% over the same period.
- On a year-to-date basis, these airports welcomed 590 million passengers, which is 31% higher than in 2022 (same period).
- In any case, passenger growth per day between May and June 2023 increased (+9.1%) faster than movements' growth per day (+5.3%), explained by the higher load factors.

* The sample is based on top 40 ECAC airports for year 2022. A passenger travelling between these airports will be counted both departing and arriving.

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

Year-to-date amount billed: 5,144 M€ (+23% vs 2022)



- At Network level, 929 M€ of en-route charges were billed for July--which represents +16% 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 July 2023 variation vs July 2022 (+16%) is explained by an increase in Unit Rates (+7%) and an increase in Service Units (+10.5%).
- 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 5,144 M€, which is +23% 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 8:45 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