



EUROCONTROL

EUROPEAN AVIATION OVERVIEW 06-12 Sep 2023

Headlines

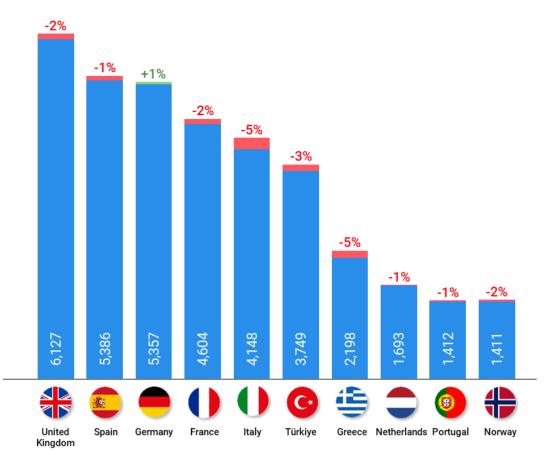
(Week 06-12 Sep 2023)

- The Network recorded 32,514 average daily flights (+7% vs 2022), remaining slightly below (-1.4%) the previous week and standing at 94% of 2019 levels
- For the first 12 days of September, the number of flights in the Network was 93% of 2019 levels.
- On average, operators did not deploy additional capacity over the last week; the top 10 aircraft operators recorded a slight decrease (-0.9%) vs the previous week.
- Arrival and departure punctuality, at 71% and 64% respectively, were 6.5/7.6 percentage points below 2019 levels, but better than the equivalent week in 2022.
- EUROCONTROL billed 921M€ of en-route charges for August flights, 14% above the amount billed for August 2022 flights. On a year-to-date basis, EUROCONTROL billed 6,065M€ in 2023, +21% compared to 2022, as a result of a combination of more service units and higher unit rates.
- The average jet fuel price stood at 3.02 USD/gallon on 8 September 2023, increasing (+0.5%) over two weeks. Current prices have increased by 5% compared to the beginning of the year.

Top 10 busiest States

On week 06-12 Sep 2023

(all flights incl. overflights compared with previous week)

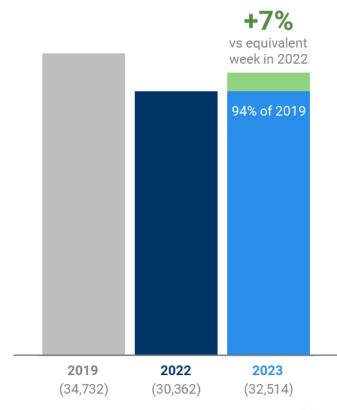




Traffic situation

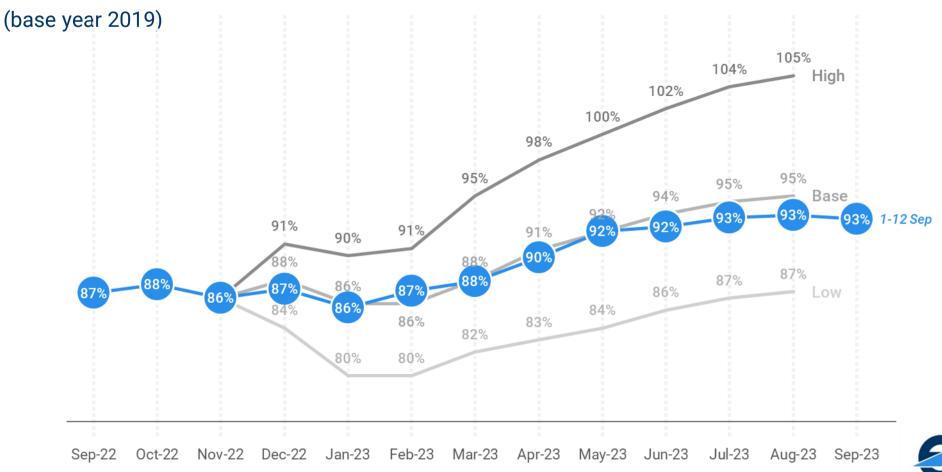
Average daily flights (including overflights)

Week 06-12 Sep 2023





Overall situation compared to the EUROCONTROL Traffic Scenarios



scenarios were published on 16 December 2022. Since that date, Network traffic has evolved largely in line with our Base scenario.

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- An update of the traffic scenarios for the next 6 months is in preparation.
- For the first 12 days of September, flights closed at 93% of September 2019 levels..
- On a year-to-date basis, Network traffic is at 91% of 2019, and +11% vs 2022

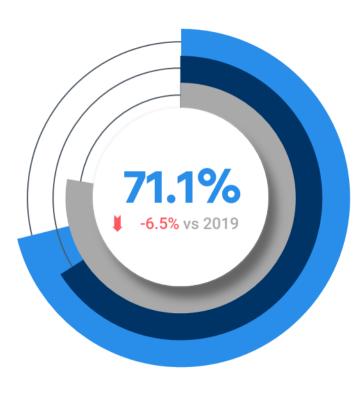
Publication date: December 2022 EUROCO

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Arrival & departure punctuality

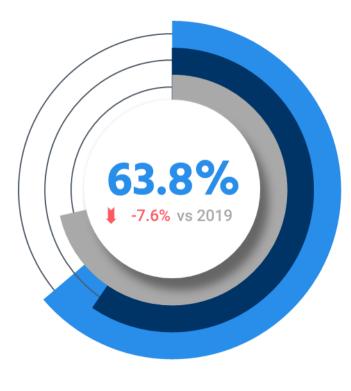
(at top airports for the last week) Week 06-12 Sep 2023

ARRIVAL PUNCTUALITY



77.6% ______ in 2019 66.0% in 2022

DEPARTURE PUNCTUALITY



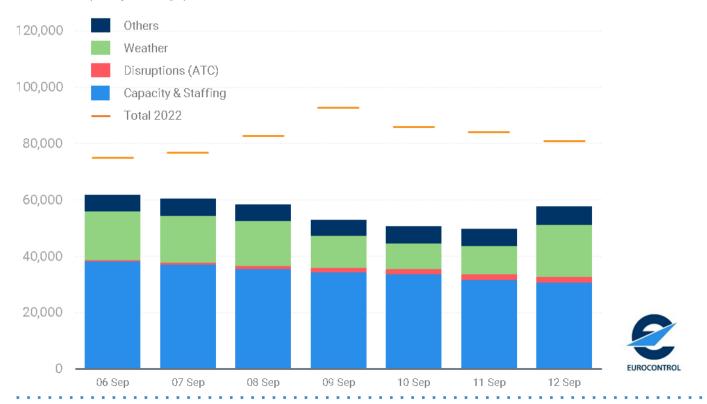
71.4% ______ in 2019 59.5% _____ in 2022

- Network punctuality deteriorated when compared to the equivalent week in 2019. Arrival punctuality was down by 6.5 percentage points to 71.1% with departure punctuality falling by 7.6 percentage points to 63.8%. However, compared to the equivalent week in 2022, this was an improvement.
- Seasonal weather (thunderstorms, convective activity and low visibility) impacted the network during the week.
- Regarding airports, Amsterdam Schiphol was significantly affected on the 9th September by low visibility, resulting in delays. London Gatwick saw delays throughout the week from a combination of ATC staffing, ATC capacity, aerodrome capacity and weather delays. Lisbon airport experienced daily regulations for aerodrome capacity and weather. Early morning low visibility caused delays at Stockholm Arlanda on 11 & 12 September.

En-route ATFM delays

Delays per cause (EUROCONTROL Area)

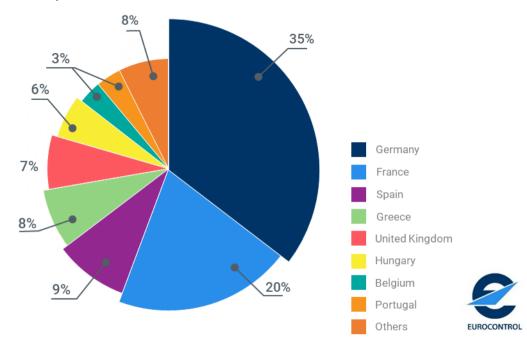
In minutes (7-day average) in 2023



- For the period 06-12 September, en-route ATFM delays were significantly below the 2022 levels (7-day average shown in graph).
- On average, they amounted to 57,800 minutes a day, with the main causes being capacity & staffing and weather.

Share of en-route ATFM delays

Week 06-12 Sep 2023



- Germany accounted for 35% of all en-route ATFM delays, mainly concentrated in the Karlsruhe and Munich ACCs.
- France came second with 20% of all en-route ATFM delays, mainly concentrated in the Reims ACC.
- Spain came third with 9% of all en-route ATFM delays.

Top 10 States

Departures and arrivals

Week 06-12 Sep 2023

No.	Country	Average daily flights	% prev week	% prev year	% 2019
1.	United Kingdom	6,127	-2%	+ +9%	▼ -5%
2.	Spain	5,386	-1%	+ +7%	▼ -1%
3.	Germany	5,357	+1%	+ +6%	▼ -16%
4.	France	4,604	-2%	+ +6%	♦ -5%
5.	() Italy	4,148	-5%	+ +3%	▼ -2%
6.	C• Türkiye	3,749	-3%	↑ +11%	+ +7%
7.	Greece	2,198	-5%	+ +7%	+ +10%
8.	Netherlands	1,693	-1%	↑ +4%	▼ -8%
9.	Portugal	1,412	-1%	↑ +9%	+ +9%
10.	Norway	1,411	-2%	→ -4%	♦ -9%

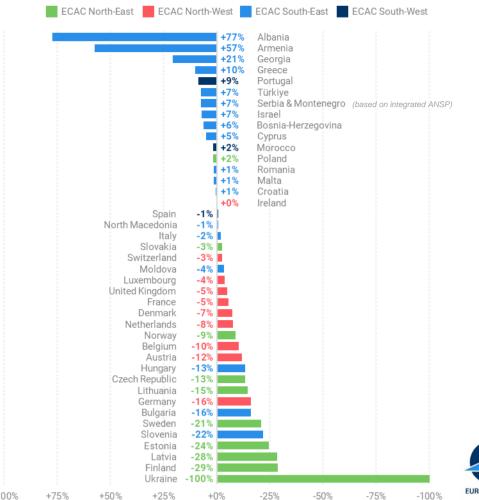


- The top 10 States, in aggregate, recorded fewer flights compared to the previous week (-2%).
- Compared to the previous edition: Portugal and Norway swapped places.
- The only State, in this top 10, which grew compared to last week is Germany, owing mainly to an increase in domestic flows. The UK recorded a 2% reduction, especially as a result of flows from and to Spain (Palma de Mallorca and Malaga), Italy (Olbia) and Türkiye (Antalya).
- 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 16% and 5% below 2019 levels.

States in the EUROCONTROL Network

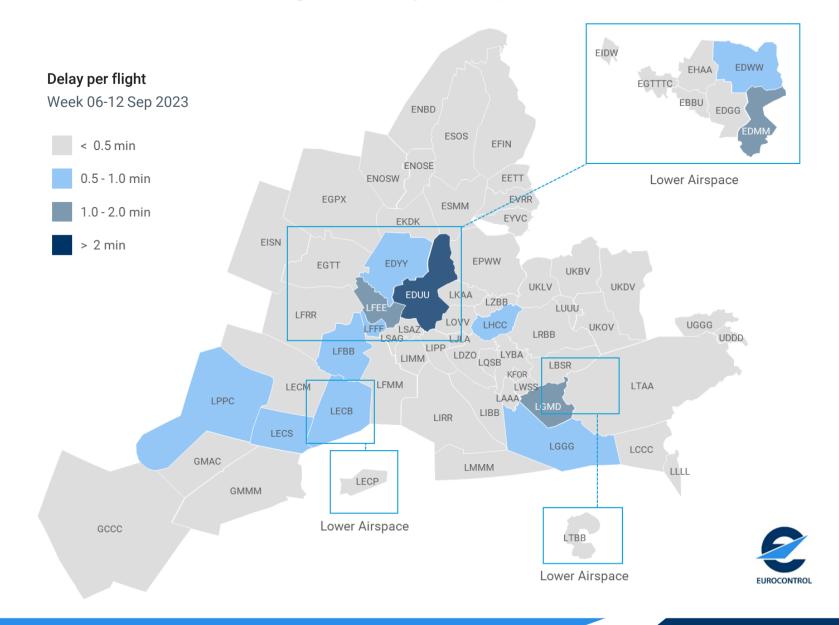
Compared to the equivalent week in 2019

Dep/Arr flights for week 06-12 Sep 2023





En-route ATFM delayed flights per Area Control Centre



- Over the last week, en-route ATFM delays have decreased by 10% compared to the week before and are below 2022 levels (57,800 minutes per day, on average).
- Compared to the same week in 2022, en-route ATFM delays were 29% lower.
- Last week, the most affected ACCs were:
 - •Karlsruhe (2.2 min/flight), owing to ATC capacity and Airspace management,
 - •Reims (1.6 min/flight) owing to ongoing ATC Capacity and staffing issues,
 - •Munich (1.5 min/flight), owing to system implementation and transition as well as staffing issues,
 - •Macedonia ACC (1.2 min/flight), owing to ATC equipment (frequency issues) and,
 - •Budapest (1.0 min/flight), due to airspace management issues.
- Overall, Germany was responsible for 35% of all en-route ATFM delays last week, followed by France (20%) and Spain (9%).

Top 10 aircraft operators

Week 06-12 Sep 2023 (avg daily flights)

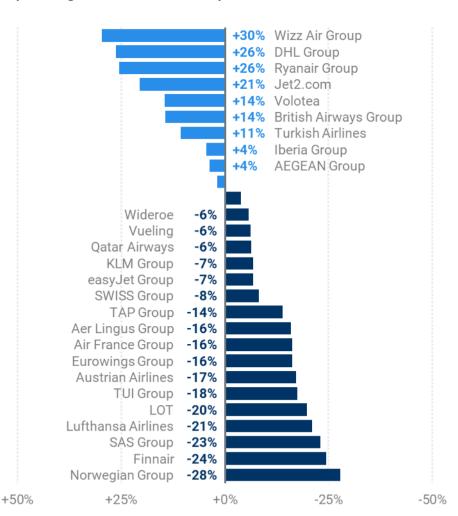
No.	Aircraft operator	Average daily flights	% prev week	% prev year	% 2019
1.	Ryanair Group	3,271	-1%	+9 %	+26 %
2.	easyJet Group	1,775	-1%	+ +9%	→ -7%
3.	Urkish Airlines	1,615	-2%	+ +9%	↑ +11%
4.	Lufthansa Airlines	1,287	+1%	+9 %	▼ -21%
5.	Air France Group	1,075	-2%	◆ -0%	▼ -16%
6.	Wizz Air Group	896	-4%	+9 %	+30 %
7.	KLM Group	884	-1%	↑ +13%	▼ -7%
8.	British Airways Group	848	+2%	↑ +19%	↑ +14%
9.	SAS Group	720	+1%	↑ +10%	▼ -23%
10.	(Vueling	682	-1%	→ -4%	♦ -6%



- The top 10 aircraft operators posted a slight decrease in the number of flights (-0.9% on average) compared to the previous week.
- Last week, only three airlines/airline groups had more daily operations compared to the week before (Lufthansa, British Airways and SAS).
- British Airways posted a 2% increase, adding flights to the domestic flows as well as on flows UK ↔ Germany or UK ↔ France. Wizz Air Group posted a 4% week-on-week decrease, removing flights mainly on the following flows: Italy ↔ Italy and Greece ↔ Italy.
- For this week, four airlines within the top 10 are flying well above their 2019 flight levels: +30% (Wizz Air Group), +26% (Ryanair Group), +14% (British Airways) and +11% (Turkish Airlines).

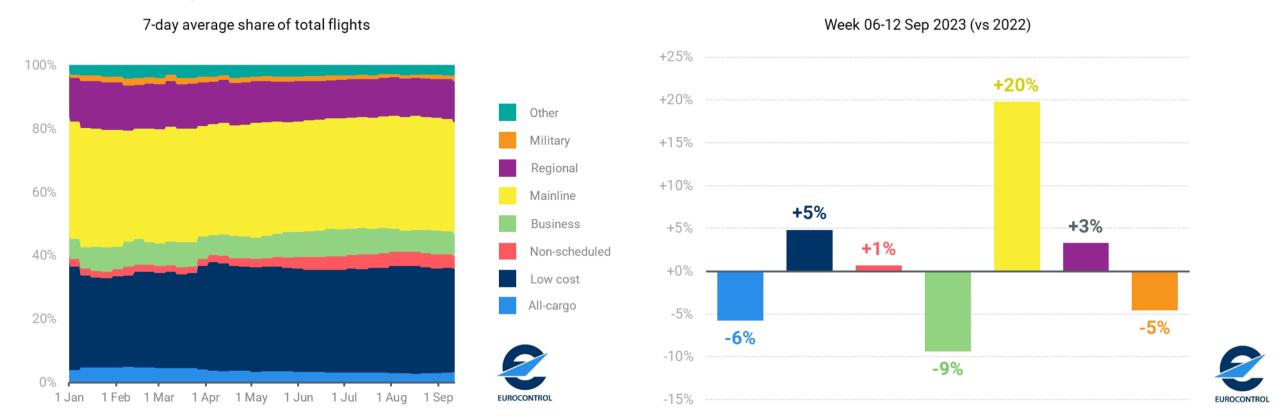
Aircraft operators in the EUROCONTROL Network

Compared to the equivalent week in 2019 Dep/Arr flights for week 06-12 Sep 2023





Market segments in the EUROCONTROL Network

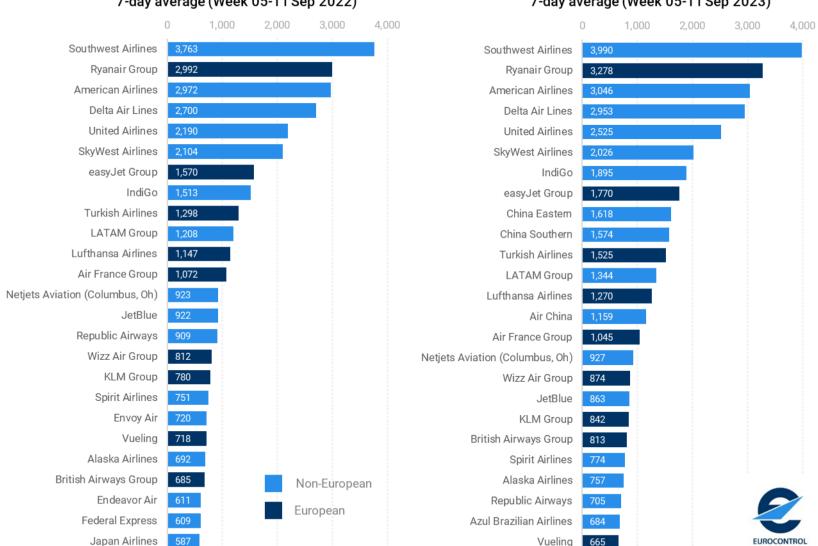


- Compared to 2022, the Mainline (+20%), Regional (+3%) and Low-cost (+5%) segments are recording growth.
- Business aviation (-9%) and All-cargo (-6%) are now recording fewer flights in 2023 compared to 2022 levels. The All-cargo market share has now stabilised (a market share of 2.9% of all flights for the period 1 12 September 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 (7.3% of total flights for the period 1 12 September 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 segment, which accounted for 4.3% of all flights for the period 1 12 September 2023, recorded slightly more flights (+1%) during the week 06 12 September 2023, compared to the same week in 2022.

Top 25 global aircraft operators

(average daily departure flights)





7-day average (Week 05-11 Sep 2023)

Over the last week:

- Nine European airlines are ranked in the top 25 global aircraft operators (as was the case in 2022).
- The first European aircraft operator is Ryanair – same rank as two weeks ago.
- The other European airline in the top 10 is easyJet (8th).
- Seven more airlines make the top 25: Turkish Airlines (11th), Lufthansa (13th), Air France (15th), Wizz Air (17th), KLM (19th), British Airways (20th) and Vueling (25th).

Source: Flightradar24 Historical Global Utilisation data

Top 10 airports



Airport ranking

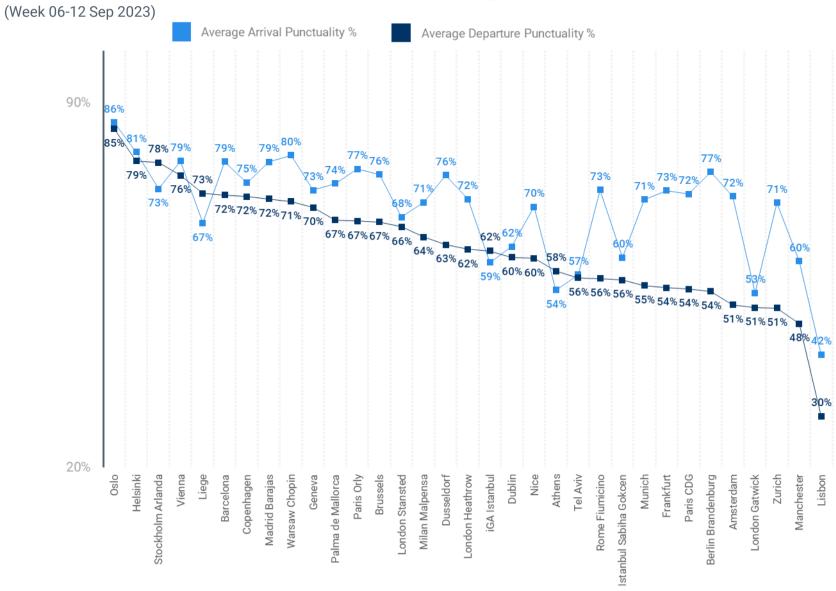
Week 06-12 Sep 2023 (vs 2019)

No.	Airport	Avg. daily dep/arr flights	vs 2022	vs 2019	
1.	iGA Istanbul	1,502	↑ +12%	↑ +17%	
2.	Amsterdam	1,383	+ +6%	→ -8%	
3.	Paris Charles de Gaulle	1,341	↑ +7%	→ -12%	
4.	London Heathrow	1,328	↑ +19%	↑ +13%	
5.	Frankfurt	1,324	↑ +14%	♦ -15%	
6.	Madrid Barajas	1,134	+ +8 %	→ -9%	
7.	Munich	977	↑ +4%	▼ -23%	
8.	Barcelona	960	4 +5%	▼ -11%	
9.	Antalya	953	↑ +10%	+ +6%	
10.	Palma de Mallorca	887	↑ +2%	↑ +2%	

- Some changes in the ranking compared to the previous edition: Frankfurt and London Heathrow swap places. Antalya lost two places and Palma De Mallorca lost one. Also, Munich rose from the 10th place to the 7th.
- All airports experienced sustained growth vs 2022, ranging from +2% (Palma de Mallorca) to +19% (London Heathrow).
- Four top 10 airports (iGA Istanbul, London Heathrow, Antalya and Palma de Mallorca) are currently handling traffic above their 2019 levels.



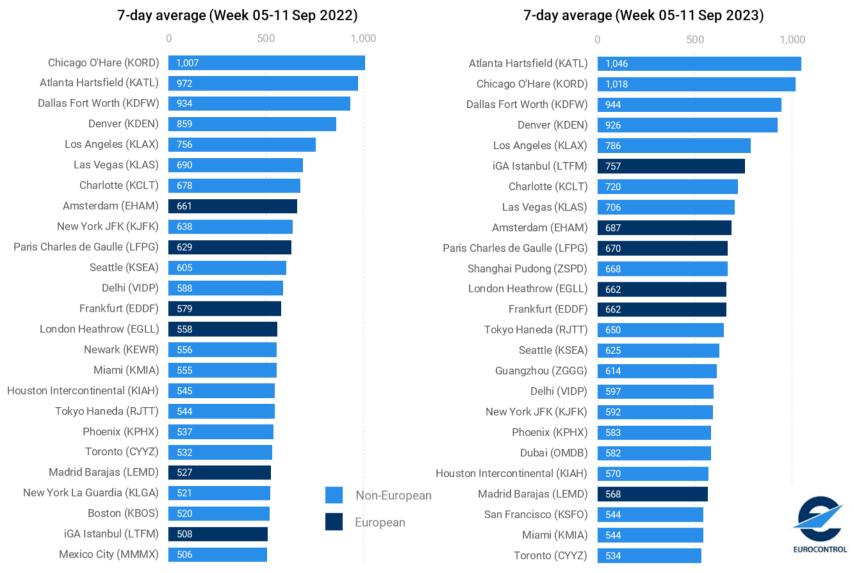
Average arr/dep punctuality at main airports



- 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 only marginally improved in May and June. July, August and early September deteriorated again compared to 2019.
- Arrival punctuality is higher (i.e. better) than departure punctuality at most airports.
- However, a few airports (notably Stockholm, Liège, IGA Istanbul and Athens) have higher departure than arrival punctuality, which indicates that these airports have been able to absorb delays.
- Lisbon airport experienced daily regulations due to aerodrome capacity (some of them due to the morning curfew) and weather issues.

Top 25 global airport departures

(average daily departure flights)

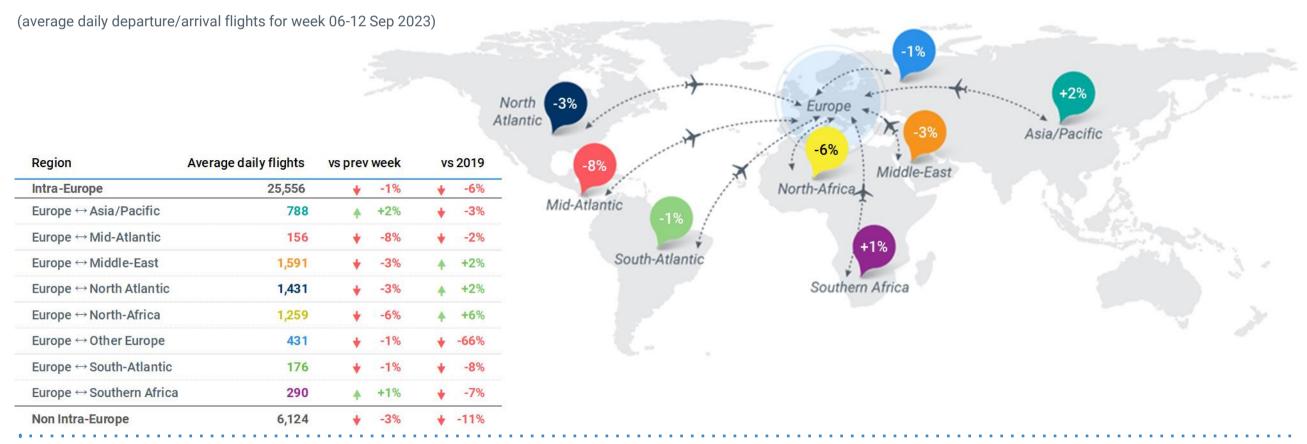


Over the last week

- 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; it was ranked 24th in 2022.
- The other European airports in the top 25 are Amsterdam (9th), Paris CDG (10th), London Heathrow (12th), Frankfurt (13th) and Madrid Barajas (22nd).

Source: Flightradar24 Historical Global Utilisation data

Traffic flows



- The main traffic flow was intra-European with 25,556 daily flights last week, fewer (-1%) than the previous week. Intercontinental flows recorded 6,124 daily flights on average last week, -3% vs the previous week.
- The second-largest regional flow is between Europe and the Middle East: 1,591average daily flights last week represented a decrease of 3% vs the previous week (fewer flights with Saudi Arabia, Lebanon).
- The third flow is to/from North America with 1,431 daily flights, slightly decreased (-3%) vs the previous week's value.
- The fourth flow is to/from North Africa, with 1,259 flights per day, decreased (-6%) vs the previous week's value (fewer flights with Algeria, Tunisia, Morocco).
- Flows with Other Europe (including the Russian Federation) remain massively reduced at -66% compared to 2019.
- Flows between Europe and Asia/Pacific have now largely recovered, to only -3% compared to 2019. European flows with China (including Hong Kong) were at 216 daily flights last week (25% below July 2019 levels).

Top 10 long-haul country pairs

(average daily departure/arrival flights for the last week)
Week 06-12 Sep 2023

No.	Country pair	Average daily flights	% prev week	% prev year	Ç	% 2019
1.	UK ↔ US	332	+0%	↑ +18%		+11%
2.	Germany ↔ US	169	-1%	+2 %	*	-1%
3.	France ↔ US	130	-7%	↑ +12%	*	-1%
4.	Italy ↔ US	90	-8%	↑ +11%		+8%
5.	Netherlands \leftrightarrow US	77	-3%	→ -3%	•	-9 %
6.	Spain ↔ US	71	-5%	↑ +10%	•	-5%
7.	$\textbf{Ireland} \leftrightarrow \textbf{US}$	70	-5%	+4 %	•	-9 %
8.	$UAE \leftrightarrow UK$	57	-1%	↑ +12%	*	-12%
9.	Canada ↔ UK	48	-3%	♦ -4%	*	-3%
10.	Canada ↔ France	44	-10%	♦ +15%	^	+7%



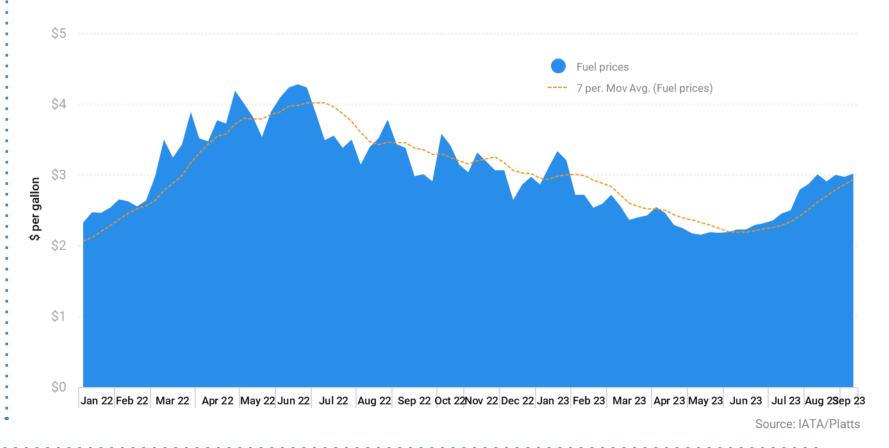
- Since the last edition, there have been a few changes in the rankings for the top 10 long-haul country pairs: Spain ↔ US, Netherlands ↔ US and Ireland ↔ US have swapped places.
- All but one of the flows posted a decrease vs the previous week (ranging from -10% to -1%).
- Seven of the Top 10 long-haul country pairs are with the US, the main three being between the US and the UK, Germany and France.
- All but two flow posted an increase on the same week in 2022.
- Three flows are currently above 2019 levels (UK ↔ US, Italy ↔ US and Canada ↔ France).

Economics

Week 06-12 Sep 2023



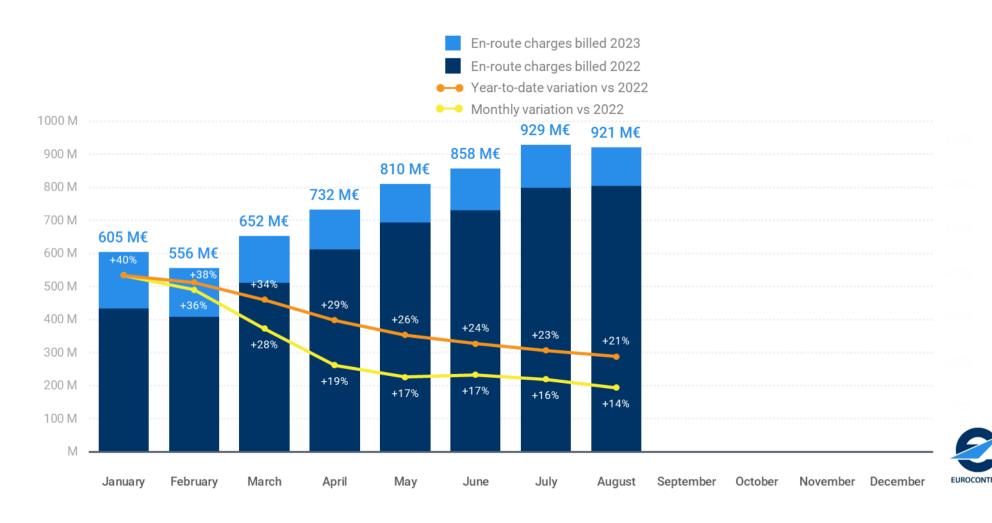
Jet fuel price (Europe)

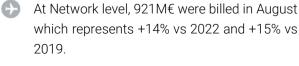


- The average price of jet fuel was at 3.02 USD/gallon on 8 September 2023, stable (+0.5%) compared to the last Overview, and 5% higher than the beginning of 2023.
- Based on a moving average trend, fuel prices in Europe had been mainly declining between June 2022 (\$4/gallon) and June 2023 (\$2.20/gallon).
- However, jet fuel prices have now jumped 19% compared to July and, on 8 September 2023, were at their highest since January 2023.
- Since June 2023, jet fuel prices have been on the rise again, after Saudi Arabia started to cut oil production by >1 million barrels/day. Higher jet fuel prices in August are partly due to soaring Chinese demand for jet fuel now above pre-COVID levels.

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

Year-to-date amount billed: 6,065 M€ (+21% vs 2022)





- 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 August 2023 variation vs August 2022 (+14%) is explained by an increase in Unit Rates (+7.4%) and an increase in average distance flown (+2%) and average aircraft weights (+3%).
- The high increases early in the year were artificially inflated by the impact of the Omicron variant of COVID-19, which negatively affected traffic (and thus service units) in early 2022. The monthly increases (compared to last year) have been levelling off during the course of the year as the effect of the outbreak have diminished
- On a year-to-date basis, EUROCONTROL has billed 6.065M€, which is +21% 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 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.



www.eurocontrol.int/our-data/

This webpage provides an overview of key charts and publications related to European aviation performance.



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.









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