



EUROCONTROL

EUROPEAN AVIATION OVERVIEW 18-24 Sep 2023

Headlines

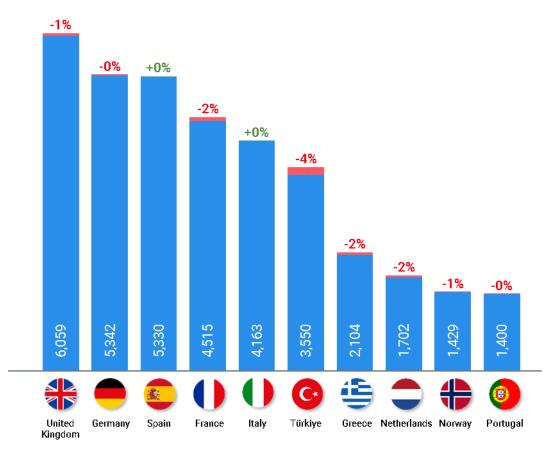
(Week 18-24 Sep 2023)

- The Network recorded 31,994 average daily flights (+8% vs 2022), remaining slightly below (-1%) the previous week and standing at 93% of 2019 levels.
- For the first 24 days of September, the number of flights in the network was also at 93% of 2019 levels.
- Seven of the top 10 carriers reduced capacity over the last week.
- En-route ATFM delays averaged just below 70,000 minutes per day (2.17 min/flight), with the main causes being capacity & staffing (48%) and weather (41%).
- Arrival and departure punctuality, at 70.4% and 63.8% respectively, were 8.1/9.4 percentage points below 2019 levels, and also lower than the equivalent week in 2022.
- The average jet fuel price stood at 3.14 USD/gallon on 22 September 2023, having increased (+4%) over ten days. Current prices have increased by 9% compared to the beginning of the year.

Top 10 busiest States

On week 18-24 Sep 2023

(all flights incl. overflights compared with previous week)

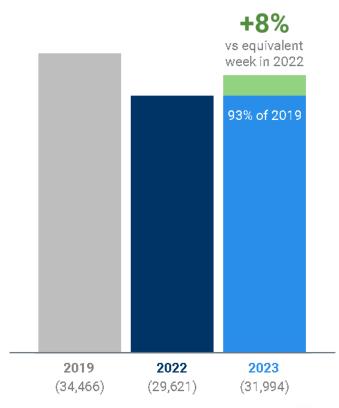




Traffic situation

Average daily flights (including overflights)

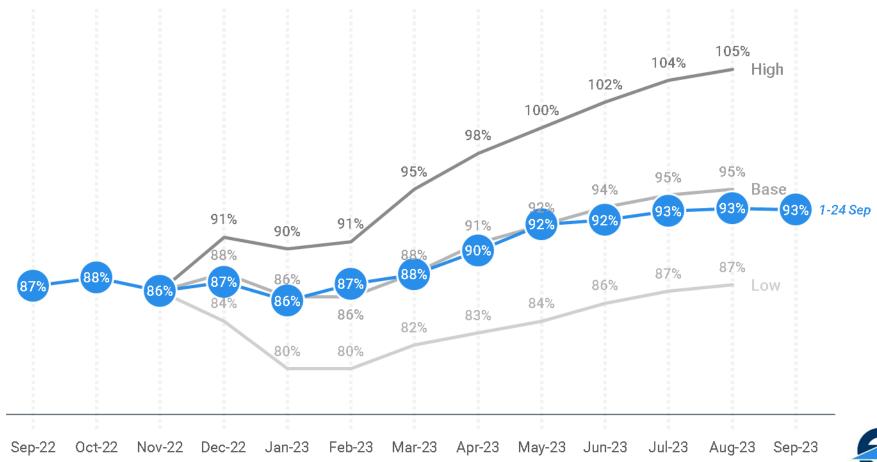
Week 18-24 Sep 2023





Overall situation compared to the EUROCONTROL Traffic Scenarios

(base year 2019)





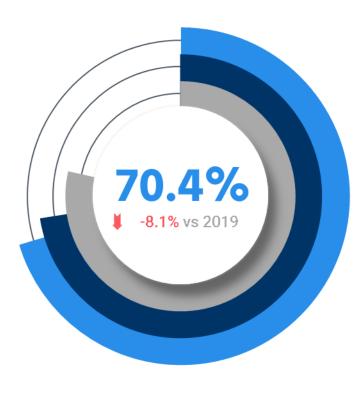
Traffic scenario shown on this graph were published in December 2022. An update is in preparation.

- The previous EUROCONTROL Traffic scenarios were published on 16 December 2022. Since that date, and up to August 2023, Network traffic has evolved largely in line with the Base scenario.
- An update of the traffic scenarios for the next six months is in preparation.
- For the first 24 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

Arrival & departure punctuality

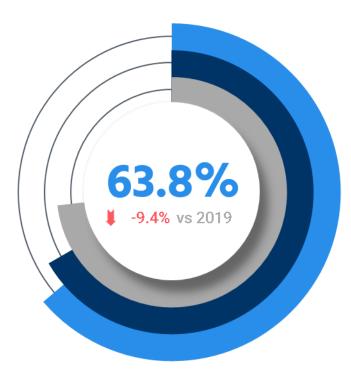
(at top airports for the last week) Week 18-24 Sep 2023

ARRIVAL PUNCTUALITY



78.5% in 2019
72.5% in 2022

DEPARTURE PUNCTUALITY



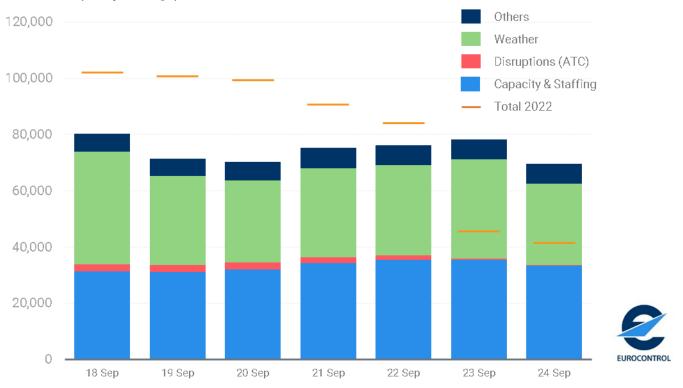
73.2% ______ in 2019 66.7% in 2022

- Network punctuality deteriorated when compared to the equivalent week in 2019. Arrival punctuality was down by 8.1 percentage points to 70.4% with departure punctuality falling by 9.4 percentage points to 63.8%. However, compared to the equivalent week in 2022, this drop was less pronounced.
- Seasonal weather (thunderstorms, convective activity & high winds) impacted the network resulting in ATFM enroute delays throughout the week with peaks at the beginning and end of the week.
- Regarding airports, London Heathrow was affected by weather regulations (CB activity and strong winds) especially on September 18th with a substantial impact on airport departure punctuality. London Gatwick saw delays throughout the week due to a combination of ATC staffing, ATC capacity, aerodrome capacity and weather delays. Airports in central Europe were also affected by weather regulations (CBs and strong winds) affecting hub airports like Frankfurt, Munich and Zurich at the beginning and end of the week. Zurich Airport saw a very low departure punctuality on September 24th due to a combination of low visibility during the morning and wind direction impacting capacity.

En-route ATFM delays

Delays per cause (EUROCONTROL Area)

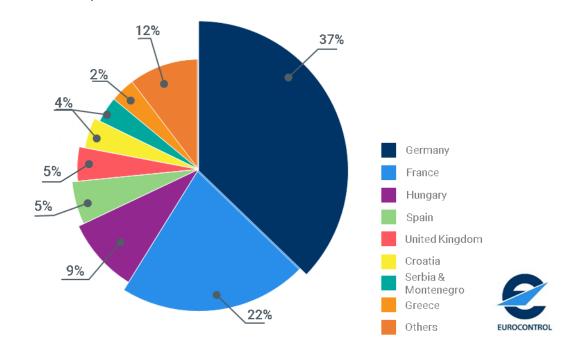
In minutes (7-day average) in 2023



- At the end of the 18-24 September week, en-route ATFM delays were above the 2022 levels (7-day average shown in graph).
- On average, they amounted to 69,540 minutes a day, with the main causes being capacity & staffing (48%) and weather (41%).

Share of en-route ATFM delays

Week 18-24 Sep 2023



- Germany accounted for 37% of all en-route ATFM delays, mainly concentrated in the Karlsruhe, Munich and Bremen ACCs.
- France came second with 22% of all en-route ATFM delays, mainly concentrated in the Reims and Paris ACCs.
- Hungary came third with 9% of all en-route ATFM delays.

Top 10 States

Departures and arrivals

Week 18-24 Sep 2023

No.	Country	Average daily flights	% prev week	% prev year	% 2019
1.	United Kingdom	6,059	-1%	+ +10%	→ -9%
2.	Germany	5,342	-0%	+ +6%	◆ -17%
3.	Spain	5,330	+0%	+ +9%	+ +0%
4.	France	4,515	-2%	↑ +7%	→ -6%
5.	() Italy	4,163	+0%	↑ +7%	→ -0%
6.	C• Türkiye	3,550	-4%	↑ +12%	+ +6%
7.	Greece	2,104	-2%	+8 %	↑ +11%
8.	Netherlands	1,702	-2%	+ +6%	→ -8%
9.	Norway	1,429	-1%	▼ -2%	♦ -8%
10.	Portugal	1,400	-0%	↑ +10%	↑ +9% E

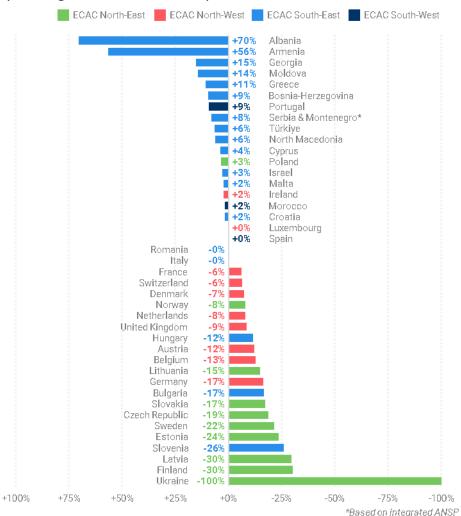


- The top 10 States, in aggregate, recorded fewer flights compared to the previous week (-1%).
- Compared to the previous edition: Germany & Spain as well as Norway & Portugal swapped places.
- Four of the top 10 States recorded similar figures to the previous week: Germany, Spain, Italy and Portugal. Türkiye dropped by 4%, especially as a result of a reduction in domestic flows and flows from/to Germany.
- Five States within the top 10 are now recording traffic in line or above 2019 (Spain, Türkiye, Greece, Portugal and Italy). The five remaining States are still between 17% and 6% below pre-COVID levels.

States in the EUROCONTROL Network

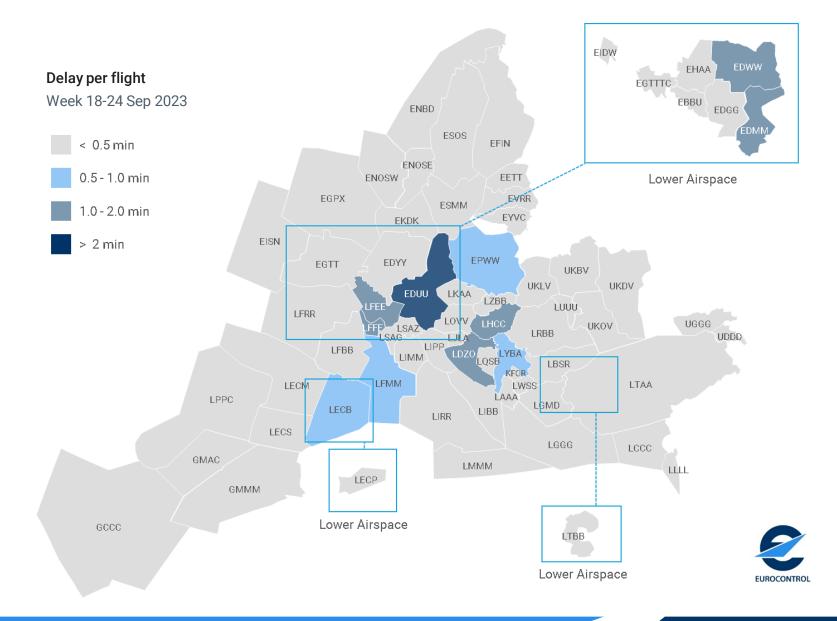
Compared to the equivalent week in 2019

Dep/Arr flights for week 18-24 Sep 2023





En-route ATFM delayed flights per Area Control Centre



- Over the last week, en-route ATFM delays have decreased by 6% compared to the week before but are above 2022 levels (69,540 minutes per day, on average).
- Compared to the same week in 2022, en-route ATFM delays were 67% higher.
- Last week, the most affected ACCs were:
 - •Karlsruhe (2.8 min/flight), owing to ATC capacity and weather,
 - •Munich (1.9 min/flight) owing to system implementation and transition as well as staffing issues,
 - •Budapest (1.8 min/flight), due to airspace management and weather issues,
 - •Reims (1.8 min/flight), owing to ATC capacity and weather, and;
 - •Bremen (1.3 min/flight), owing to capacity and staffing issues as well as airspace management (military training).
- Overall, Germany was responsible for 37% of all en-route ATFM delays last week, followed by France (22%) and Hungary (9%).

Top 10 aircraft operators

Week 18-24 Sep 2023 (avg daily flights)

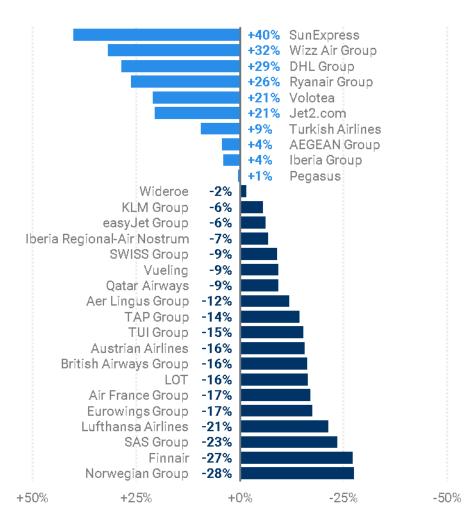
No.	Aircraft operator	Average daily flights	% prev week	% prev year	% 2019
1.	Ryanair Group	3,272	+1%	+ +9%	+26 %
2.	easyJet Group	1,773	+0%	+8 %	♦ -6%
3.	Urkish Airlines	1,539	-3%	↑ +12%	+ +9%
4.	Lufthansa Airlines	1,273	-2%	+8 %	▼ -21%
5.	Air France Group	1,063	-1%	→ -0%	▼ -17%
6.	KLM Group	897	-2%	↑ +18%	♦ -6%
7.	Wizz Air Group	875	-1%	+ +9%	+32 %
8.	British Airways Group	821	-3%	+ +18%	▼ -16%
9.	SAS Group	728	+0%	+12 %	▼ -23%
10.	vueling Vueling	641	-1%	♦ -2%	♦ -9 %



- The top 10 aircraft operators posted a slight decrease in the number of flights (-0.9% on average) compared to the previous week.
- Only three airlines/airline groups had similar or more daily operations compared to the week before (Ryanair, easyJet and SAS).
- Turkish Airlines posted a 3% decrease, caused by a decrease in domestic flows. British Airways also posted a 3% decrease due to reductions on flows UK ↔ France and UK ↔ US.
- Last week, three airlines within the top 10 had flight numbers well above 2019 levels: +32% (Wizz Air Group), +26% (Ryanair Group), +9% (Turkish Airlines).

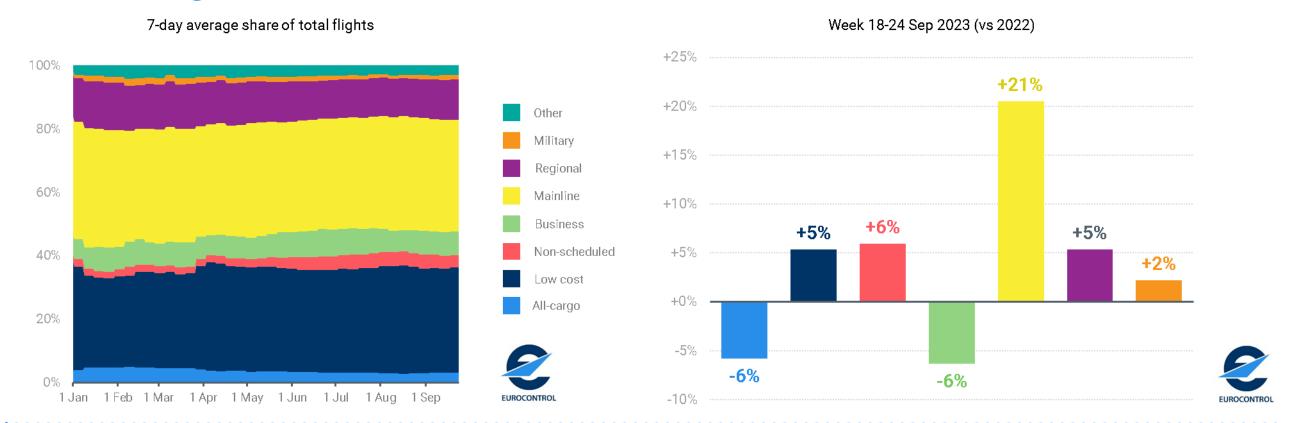
Aircraft operators in the EUROCONTROL Network

Compared to the equivalent week in 2019 Dep/Arr flights for week 18-24 Sep 2023





Market segments in the EUROCONTROL Network

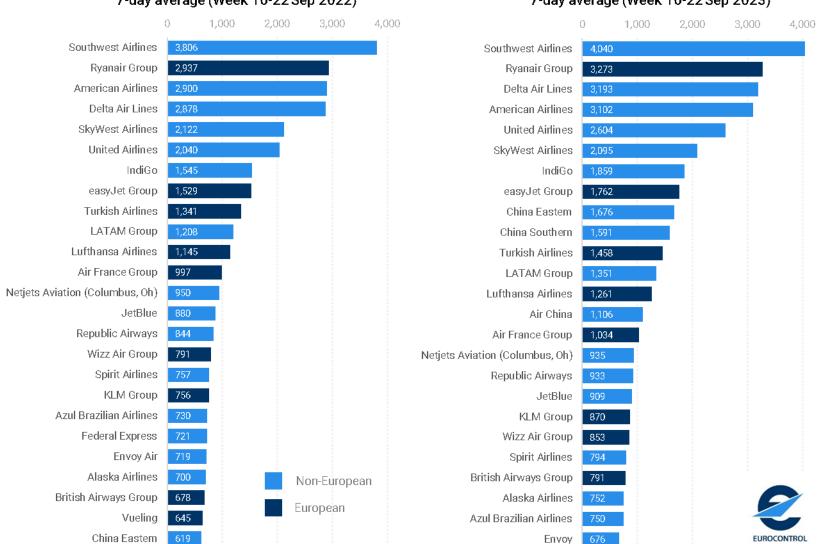


- Compared to 2022, the Mainline (+21%), Regional (+5%) and Low-cost (+5%) segments are recording growth.
- Business aviation and All-cargo (-6% each) are now recording fewer flights in 2023 compared to 2022 levels. The All-cargo market share has stabilised (a market share of 3% of all flights for the period 1 24 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 24 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 non-scheduled segment, which accounted for 4.2% of all flights for the period 1 24 September 2023, recorded slightly more flights (+6%) during the week 18 24 September 2023, compared to the same week in 2022.

Top 25 global aircraft operators

(average daily departure flights)





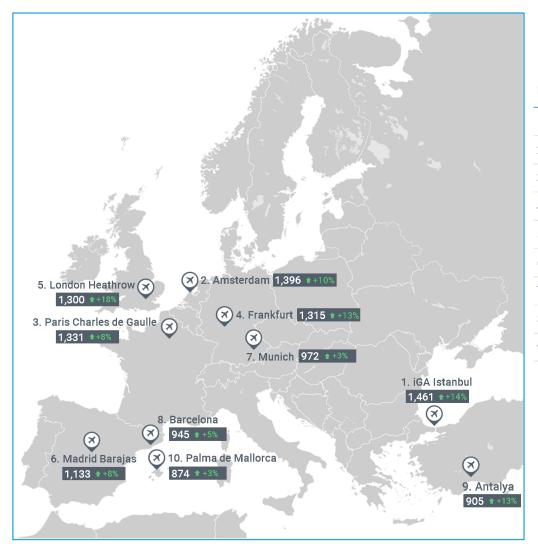
7-day average (Week 16-22 Sep 2023)

Over the last week:

- Eight European airlines are ranked in the top 25 global aircraft operators (compared to nine in 2022: Vueling does not make the 2023 list).
- The first European aircraft operator is Ryanair - the same rank as two weeks ago.
- The only other European airline in the global top 10 is easyJet (8th).
- Six more airlines make the top 25: Turkish Airlines (11th), Lufthansa (13th), Air France (15th), KLM (19th), Wizz Air (20th) and British Airways (22nd).

Source: Flightradar24 Historical Global Utilisation data

Top 10 airports



Airport ranking

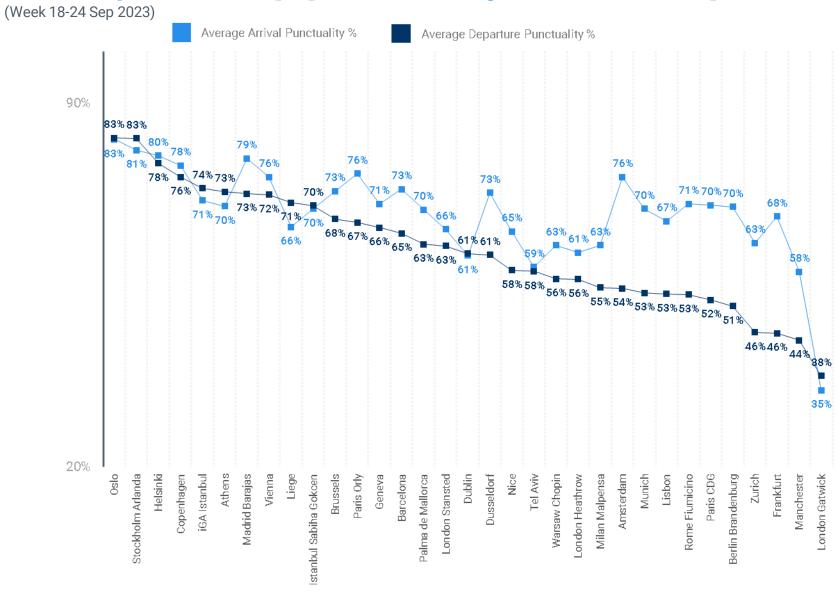
Week 18-24 Sep 2023 (vs 2019)

No.	Airport	Avg. daily dep/arr flights	% prev week	vs 2022	vs 2019
1.	iGA Istanbul	1,461	-3%	↑ +14%	↑ +17%
2.	Amsterdam	1,396	-1%	↑ +10%	♦ -8 %
3.	Paris Charles de Gaulle	1,331	-0%	+ +8 %	♦ -11 %
4.	Frankfurt	1,315	-1%	↑ +13%	♦ -15%
5.	London Heathrow	1,300	-2%	↑ +18%	♦ -5 %
6.	Madrid Barajas	1,133	-0%	+ +8 %	♦ -8%
7.	Munich	972	-0%	+ +3%	♦ -23 %
8.	Barcelona	945	+0%	↑ +5%	♦ -11 %
9.	Antalya	905	-4%	↑ +13%	↑ +6%
10.	Palma de Mallorca	874	+1%	4 +3%	+ +3%

- Some changes in the ranking compared to the previous edition: Frankfurt and London Heathrow have swapped places.
- Only one airport recorded growth vs last week: Palma de Mallorca (+1%).
- All airports experienced sustained growth vs 2022, ranging from +3% (Palma de Mallorca and Munich) to +18% (London Heathrow).
- Three top 10 airports (iGA Istanbul, Antalya and Palma de Mallorca) are currently handling traffic above their 2019 levels.



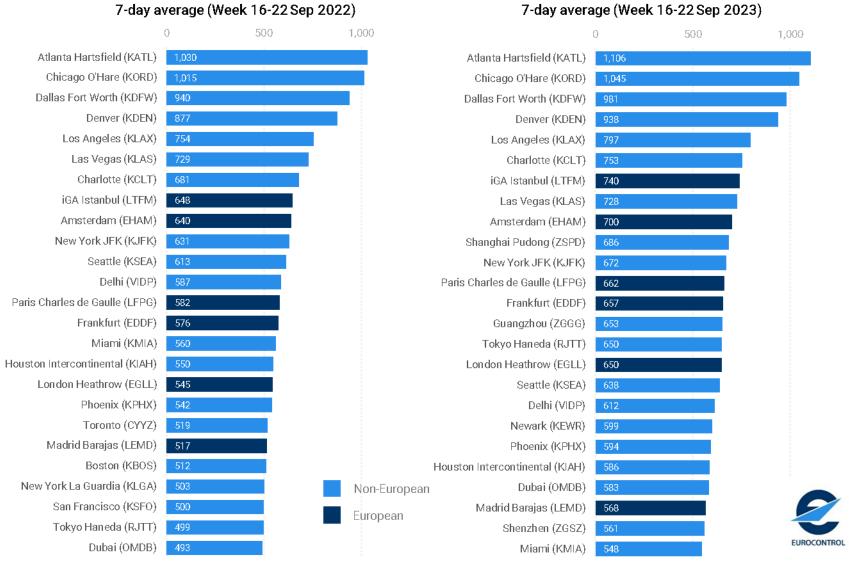
Average arr/dep punctuality at main airports



- 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 Oslo, Stockholm, IGA Istanbul, Athens, Liège, and London Gatwick) have higher departure than arrival punctuality, which indicates that these airports have been able to absorb delays.
- London Gatwick experienced regulations due to a combination of ATC staffing, ATC capacity, aerodrome capacity and weather delays.

Top 25 global airport departures

(average daily departure flights)



Six European airports are ranked in the top 25 of global airport departures (the same number as in 2022).

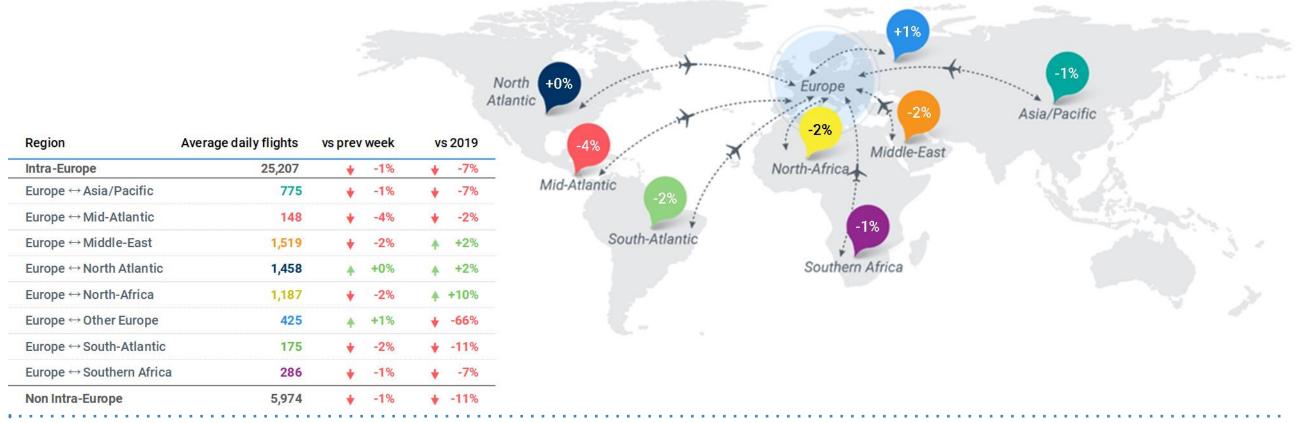
Over the last week

- The highest ranked European airport (7th) is iGA Istanbul Airport; it was ranked 8th in 2022.
- The other European airports in the top 25 are Amsterdam (9th), Paris CDG (12th), Frankfurt (13th), London Heathrow (16th) and Madrid Barajas (23rd).

Source: Flightradar24 Historical Global Utilisation data

Traffic flows

(average daily departure/arrival flights for week 18-24 Sep 2023)



- The main traffic flow was intra-European with 25,207 daily flights last week, fewer (-1%) than the previous week. Intercontinental flows resulted in 5,974 daily flights on average last week, -1% vs the previous week.
- The second-largest regional flow is between Europe and the Middle East: 1,519 average daily flights last week represented a decrease of 2% vs the previous week (fewer flights with Kuwait, Lebanon and Qatar).
- The third flow is to/from North America with 1,458 daily flights, unchanged vs the previous week's value.
- The fourth flow is to/from North Africa, with 1,187 flights per day, decreased (-2%) vs the previous week's value (fewer flights to/from Morocco, Tunisia and Algeria)
- 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 -7% compared to 2019. European flows with China (including Hong Kong) were at 255 daily flights last week (4% higher than in the last edition).

Top 10 long-haul country pairs

(average daily departure/arrival flights for the last week) **Week 18-24 Sep 2023**

No.	Country pair	Average daily flights	% prev week	% prev year	%	2019
1.	UK ↔ US	332	-2%	↑ +14%	A	+2%
2.	Germany ↔ US	173	+2%	+4 %		+1%
3.	France ↔ US	135	+1%	↑ +17%	4	+4%
4.	Italy ↔ US	91	-2%	♦ +13%		+8%
5.	$\textbf{Netherlands} \leftrightarrow \textbf{US}$	80	+1%	→ -1%	\	-9%
6.	Spain ↔ US	75	+3%	↑ +14%	4	-6%
7.	$\textbf{Ireland} \leftrightarrow \textbf{US}$	74	+1%	↑ +10%		+2%
8.	$UAE \leftrightarrow UK$	57	-3%	♦ +15%	•	-16%
9.	Canada ↔ UK	49	+2%	+2 %	4	+0%
10.	Switzerland ↔ US	44	-2%	★ +21%		+6%



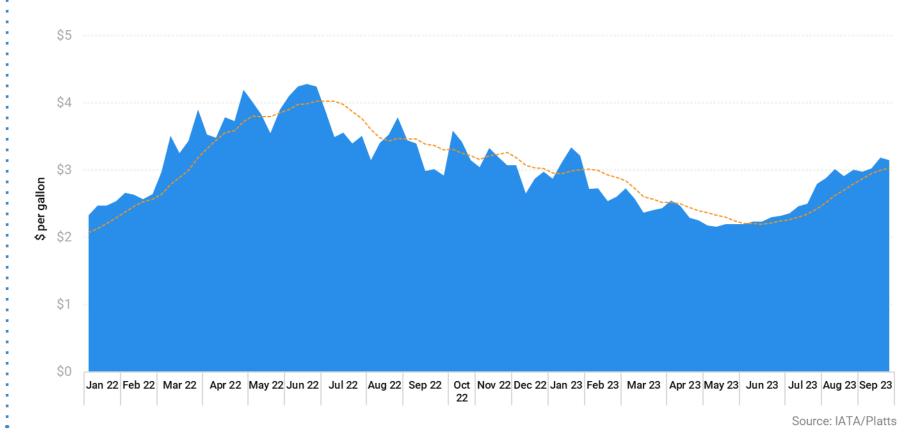
- Since the last edition, there have been one change in the rankings for the top 10 longhaul country pairs: Canada ↔ France has been replaced by Switzerland ↔ US.
- All but four of the flows posted an increase vs the previous week (ranging from +1% to +3%).
- Eight of the Top 10 long-haul country pairs 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.
- Seven flows are currently at or above 2019 levels (UK ↔ US, Germany ↔ US, France ↔ US, Italy ↔ US, Ireland ↔ US, Canada ↔ UK and Switzerland ↔ US).

Economics

Week 18-24 Sep 2023



Jet fuel price (Europe)



- The average price of jet fuel was at 3.14 USD/gallon on 22 September 2023, higher (+4%) compared to the last Overview, and 9% higher than the beginning of 2023.
- Based on a moving average trend, fuel prices in Europe mainly declined between June 2022 (\$4/gallon) and June 2023 (\$2.20/gallon).
- Since June 2023, jet fuel prices have begun to rise after Saudi Arabia (and the Russian Federation) started to cut oil production.
- Det fuel prices have now jumped 33% compared to July and, on 15 September 2023, were at their highest since January 2023.

GDP in the European Union

Constant prices and exchange rate, Euro

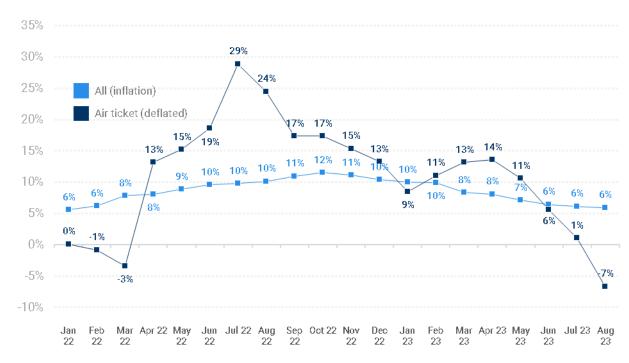


Source: Oxford Economics Ltd.

- According to the latest GDP forecast from Oxford Economics, the EU27 economies posted positive growth during Q1 2023 (+0.2% vs Q1 2022), but stagnated during Q2 2023. The EU27 quarterly forecast rates for Q3 and Q4 2023 have been revised 0.1 percentage points down (each) since end-July.
- The average GDP for 2023 and 2024 should be 103 and 105 respectively (using 2019 as a baseline at 100).

Price change per month (EU27)

Values compare to the same month of the previous year



Source: EUROSTAT

The latest information from EUROSTAT shows the following:

- Particles In August 2023, all-prices inflation stood at 6%; ticket prices decreased by 7% (excluding inflation).
- This is the biggest decrease in air ticket prices since March 2022.
- The decrease in air ticket prices in August 2023 is important, because prices had surged in August 2022.
- Compared to July 2023, air ticket prices were 5% lower in August 2023.

Supporting European Aviation

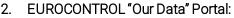


To further assist you in your analysis, EUROCONTROL provides the following additional information on a daily basis (daily updates at 8:45 CET for the first item) and every Friday for the last item:

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.

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.









© EUROCONTROL - 2023

This document is published by EUROCONTROL for information purposes. It may be copied in whole or in part, provided that EUROCONTROL is mentioned as the source and it is not used for commercial purposes (i.e. for financial gain). The information in this document may not be modified without prior written permission from EUROCONTROL.

www.eurocontrol.int

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