



EUROCONTROL

EUROPEAN AVIATION OVERVIEW 16-22 Oct 2023

Headlines

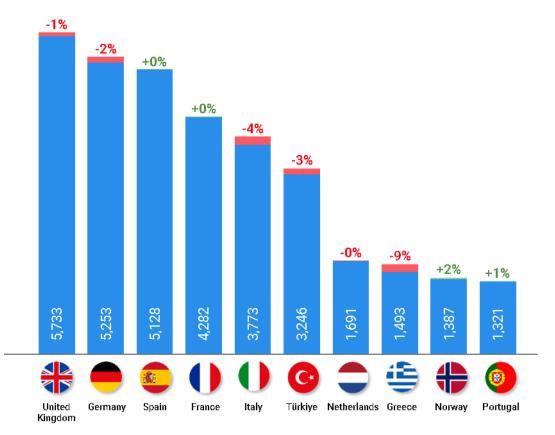
(Week 16-22 Oct 2023)

- The network recorded 29,768 average daily flights (+8% vs 2022), remaining slightly below (-1.9%) the previous week and standing at 93% of 2019 levels.
- For the first 22 days of October, the number of flights in the network was at 94% of 2019 levels, in line with the EUROCONTROL Monthly Traffic Forecast, Base Scenario.
- On average, the top 10 carriers kept their capacity similar compared to the previous week.
- Outside Europe, the busiest regional flow is between Europe and the North Atlantic, outpacing the flow Europe ↔ Middle-East, affected by reduced traffic from/to Israel.
- Arrival and departure punctuality, at 69.8% and 65.8% respectively, were 11.1/10.5 percentage points below 2019 levels, but still slightly better than the equivalent week in 2022.
- EUROCONTROL billed 867M€ in en-route charges for September 2023 flights, 16% above the amount billed for September 2022 flights. On a year-to-date basis, EUROCONTROL has billed 6,932M€ in 2023, +21% compared to 2022, reflecting more service units and higher unit rates.
- The average jet fuel price stood at 3.02 USD/gallon on 20 October 2023, having increased (+9%) over ten days. Current prices have increased by 6% compared to the beginning of the year.

Top 10 busiest States

On week 16-22 Oct 2023

(all flights excl. overflights compared with previous week)

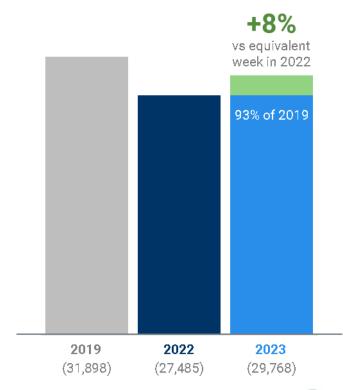




Traffic situation

Average daily flights (including overflights)

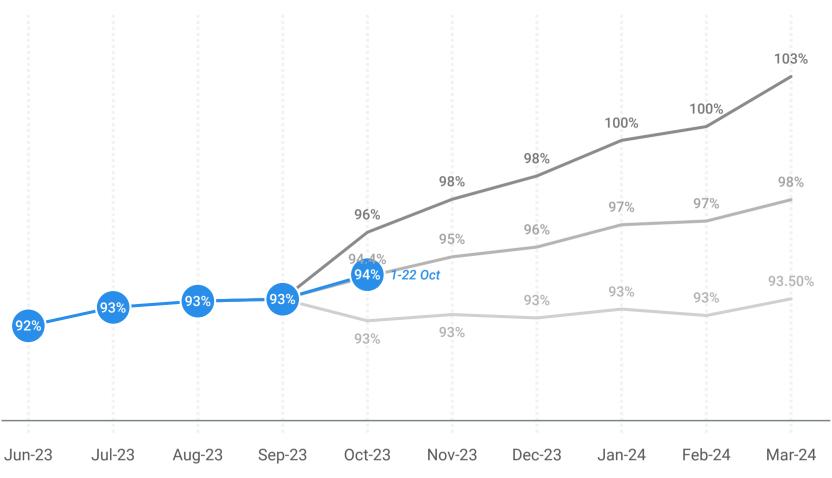
Week 16-22 Oct 2023





Overall situation compared to the EUROCONTROL Monthly Traffic Forecast

(base year 2019)



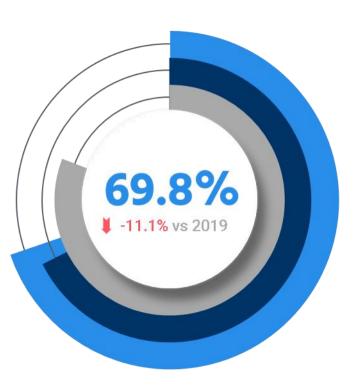
- The latest EUROCONTROL Monthly Traffic Forecasts for the period up to March 2024 predict continuing growth, reaching 98% of 2019 traffic in our Base Scenario by the end of the period.
- The number of flights in the first 22 days of October were 94% of those in the same period in 2019.
- On a year-to-date basis, network traffic is at 91% of 2019, and 11% higher than 2022.

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Arrival & departure punctuality

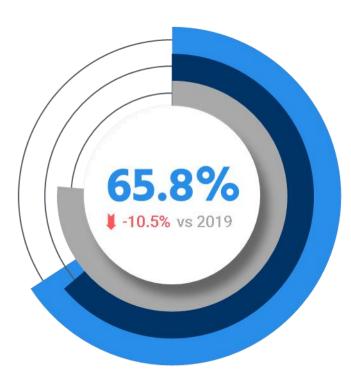
(at top airports for the last week)
Week 16-22 Oct 2023

ARRIVAL PUNCTUALITY



80.8% _____ in 2019 67.6% in 2022

DEPARTURE PUNCTUALITY



76.3% _____ in 2019 63.7% in 2022

The pictures show the share of flights arriving/departing no later than 15 minutes after/before the scheduled time (OTP15).

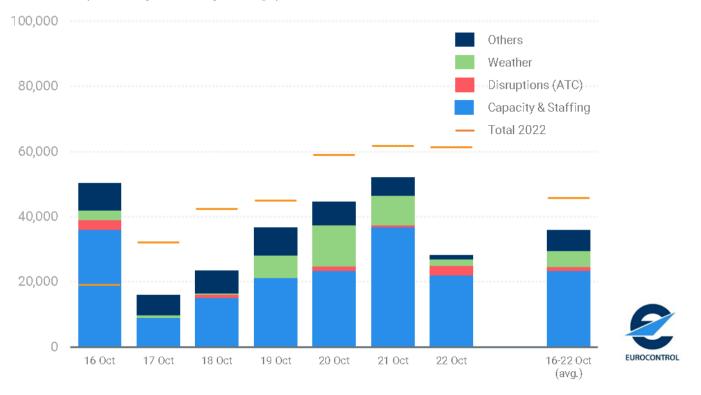


- Network punctuality deteriorated when compared to the equivalent week in 2019. Arrival punctuality was down by 11.1 percentage points to 69.8%, with departure punctuality falling by 10.5 percentage points to 65.8%. However, compared to the equivalent week in 2022, this week's figures were slightly better.
- Seasonal weather (low visibility, rain, convective activity & high winds) impacted the network, resulting in ATFM en-route and ATFM airport delays throughout the week, with notable peaks at end of the week.
- Regarding airports, Amsterdam-Schiphol experienced delays due to high winds (cross wind landing limitations). Lisbon was also affected by weather on 19 October, as well as daily aerodrome capacity delays throughout the week. London Heathrow and London Gatwick were affected by weather regulations (low visibility, rain and strong winds), especially on 18 and 19 October. Malaga was affected by heavy rain in the early evening of 19 October with 43 flights having to divert. Several French airports (Lille, Nantes, Nice, Toulouse, Paris Beauvais, Lyon Bron & Strasbourg) saw disruption to their operations on 18 & 19 October due to security threats and subsequent terminal evacuations.

En-route ATFM delays

Delays per cause (EUROCONTROL Area)

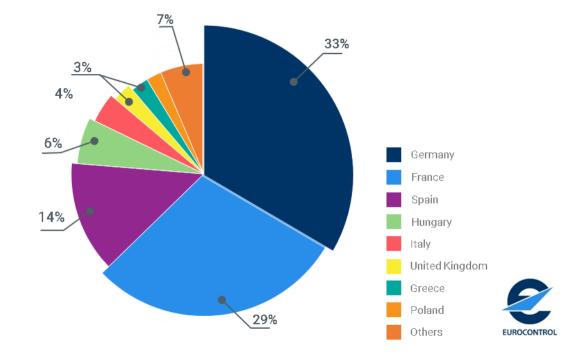
In minutes (total daily and 7-day average) in 2023



- For the week of 16-22 October 2023, en-route ATFM delays were below 2022 levels (except on 16 October)
- On average (last bar on the right), they amounted to just below 36,000 minutes a day, with the main cause being capacity & staffing (65%).

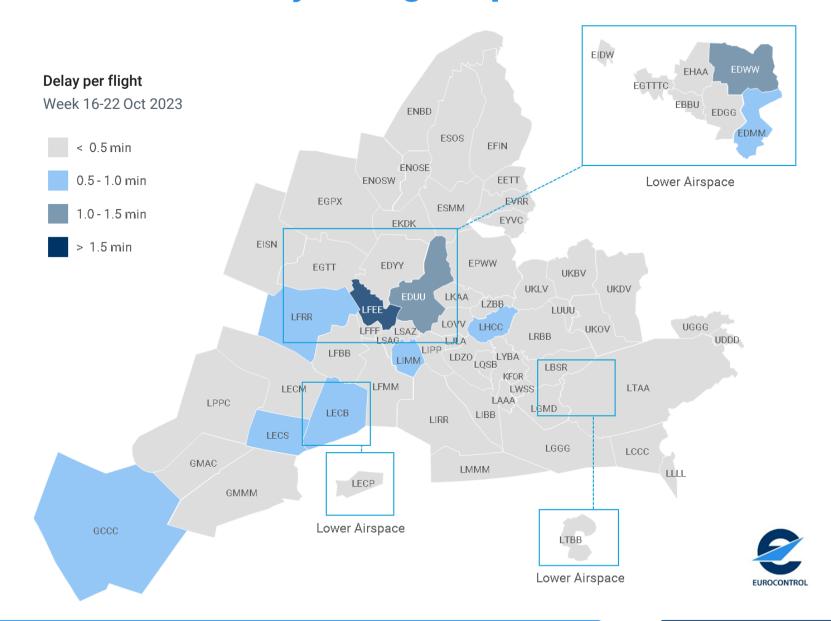
Share of en-route ATFM delays

Week 16-22 Oct 2023



- Germany accounted for 33% of all en-route ATFM delays, mainly concentrated in the Bremen, Karlsruhe and Munich ACCs.
- France was second with 29% of all en-route ATFM delays, mainly concentrated in the Reims and Brest ACCs.
- Spain was the third highest with 14% of all en-route ATFM delays, mainly concentrated in the Sevilla and Barcelona ACCs.

En-route ATFM delayed flights per Area Control Centre



- Over the last week, en-route ATFM delays have decreased by 44% compared to the week before, and are below 2022 levels (46,000 minutes per day, on average).
- Compared to the same week in 2022, en-route ATFM delays were 22% lower.
- Last week, the most affected ACCs were:
 - Reims (1.7 min/flight), owing to ATC capacity and weather
 - Bremen (1.3 min/flight), owing to ATC equipment
 - Karlsruhe (1.3 min/flight), owing to ATC capacity and airspace management
 - Sevilla (0.8 min/flight)
 - Munich (0.8 min/flight) owing to system implementation and transition as well as staffing issues.
- Overall, Germany was responsible for 33% of all en-route ATFM delays last week, followed by France (29%) and Spain (14%).

Top 10 States

Departures and arrivals

Week 16-22 Oct 2023

No.	Country	Average daily flights	% prev week	% prev year	% 2019
1.	United Kingdom	5,733	-1%	+ +10%	▼ -7%
2.	Germany	5,253	-2%	↑ +11%	▼ -16%
3.	Spain	5,128	+0%	+8 %	↑ +4%
4.	France	4,282	+0%	+ +6%	♦ -4%
5.	Italy	3,773	-4%	↑ +16%	+2 %
6.	C Türkiye	3,246	-3%	↑ +12%	+ +5%
7.	Netherlands	1,691	-0%	↑ +11%	▼ -7%
8.	Greece	1,493	-9%	↑ +11%	↑ +13%
9.	Norway	1,387	+2%	▼ -2%	▼ -8%
10.	Portugal	1,321	+1%	↑ +12%	↑ +11%

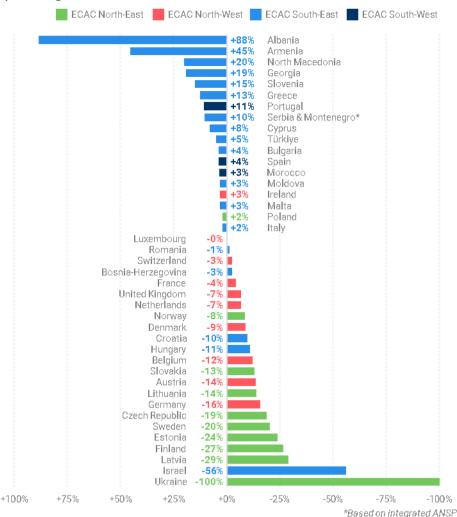


- The top 10 States, in aggregate, recorded fewer flights compared to the previous week (-1.5%).
- Compared to the previous edition: Greece & Netherlands have swapped places.
- Four of the top 10 States recorded similar or slightly higher figures compared to the previous week: Spain, France, Norway and Portugal. Greece dropped by 9% owing to a reduction in domestic flows and on flows from/to Israel. Türkiye dropped by 3%, reflecting in particular a reduction in domestic flows and flows from/to Germany.
- Five States within the top 10 are now recording traffic in line with or above 2019 (Spain, Italy, Türkiye, Greece and Portugal). The five remaining States are still between 17% and 4% below pre-COVID levels.

States in the EUROCONTROL network

Compared to the equivalent week in 2019

Dep/Arr flights for week 16-22 Oct 2023





Top 10 aircraft operators

Week 16-22 Oct 2023 (avg daily flights)

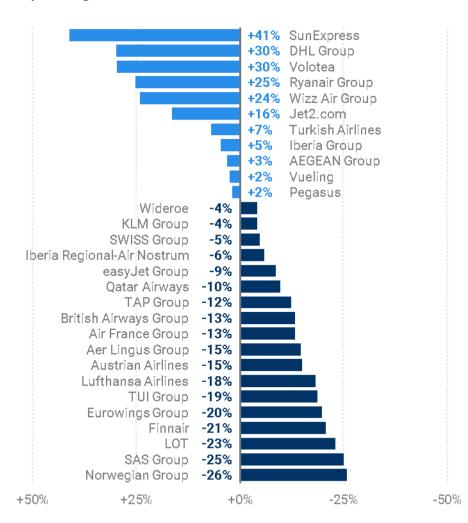
No.	Aircraft operator	Average daily flights	% prev week	% prev year	% 2019
1.	Ryanair Group	3,163	-0%	↑ +12%	↑ +25%
2.	easyJet Group	1,670	+2%	+7 %	♦ -9%
3.	Turkish Airlines	1,451	-2%	↑ +14%	↑ +7%
4.	Lufthansa Airlines	1,283	-1%	+8 %	▼ -18%
5.	Air France Group	1,056	+3%	+3 %	▼ -13%
6.	KLM Group	894	+0%	+20 %	♦ -4%
7.	Wizz Air Group	822	-0%	↑ +10%	↑ +24%
8.	British Airways Group	821	+0%	↑ +16%	▼ -13%
9.	SAS Group	682	+1%	+8 %	♦ -25%
10.	veling Vueling	634	+0%	↑ +1%	↑ +2%



- The top 10 aircraft operators posted a similar number of flights (-0.1% on average) compared to the previous week.
- Six airlines/airline groups had similar or more daily operations compared to the week before (easyJet (+2%), Air France (+3%) and SAS (+1%) and KLM, British Airways and Vueling (no change)).
- Turkish Airlines posted a 2% decrease, caused mainly by a decrease in domestic flows and flows from/to Germany. Lufthansa posted a 1% decrease due to reductions in flows Germany ↔ Italy and within Germany.
- Last week, four top 10 airlines had flight numbers well above 2019 levels: +25% (Ryanair Group), +24% (Wizz Air Group), +7% (Turkish Airlines) and +2% (Vueling).

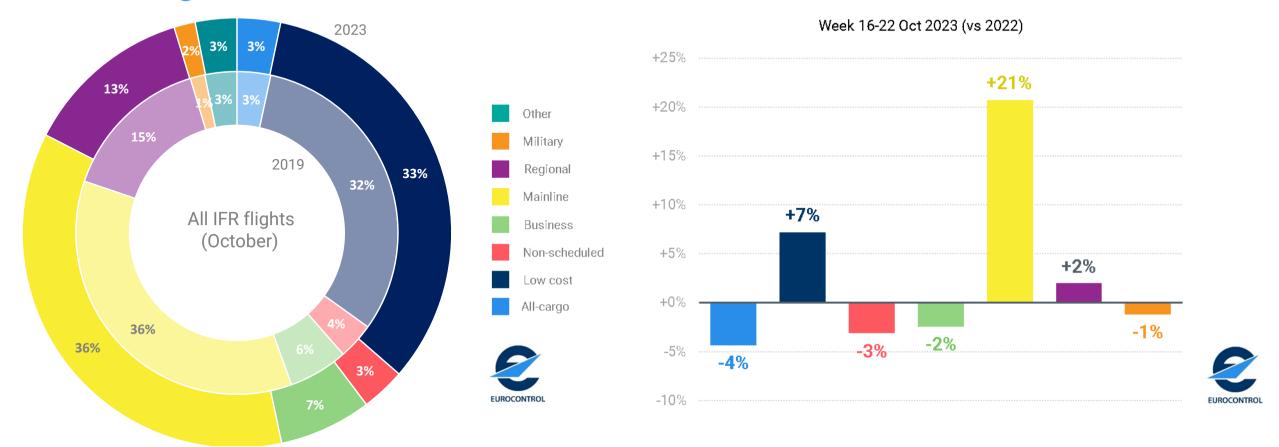
Aircraft operators in the EUROCONTROL network

Compared to the equivalent week in 2019 Dep/Arr flights for week 16-22 Oct 2023





Market segments in the EUROCONTROL network

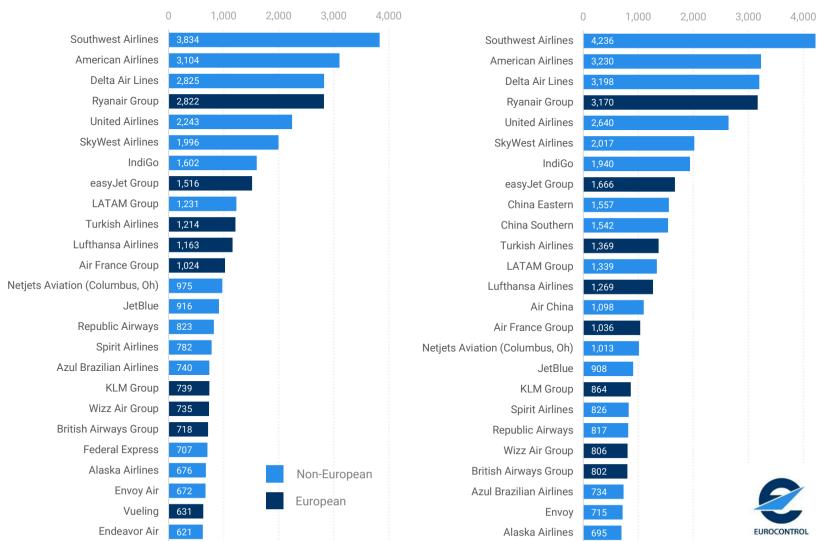


- Compared to 2022, the Mainline (+21%), Regional (+2%) and Low-cost (+7%) segments are all recording growth.
- Business aviation and All-cargo (-2% and -4% respectively) are now recording fewer flights in 2023 compared to 2022 levels. The All-cargo market share has stabilised (a market share of 3.3% of all flights for the period 1-22 October 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 (7.0% of total flights for the period 1-22 October 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 3.3% of all flights for the period 1-22 October 2023, recorded fewer flights (-3%) during the week 16-22 October 2023 compared to the same week in 2022, notably owing to decreases in flows from/to Poland and in flows from/to Israel.

Top 25 global aircraft operators

(average daily departure flights)





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

Over the week 16-22 October 2023:

- 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 top European aircraft operator is the Ryanair Group, which is fourth globally two places lower than two weeks ago.
- The only other European airline to make the global top 10 is easyJet (8th).
- Six more airlines feature in the top 25: Turkish Airlines (11th), Lufthansa (13th), Air France Group (15th), KLM Group (18th), Wizz Air Group (21st) and British Airways Group (22nd).

Source: Flightradar24 Historical Global Utilisation data

Top 10 airports



Airport ranking

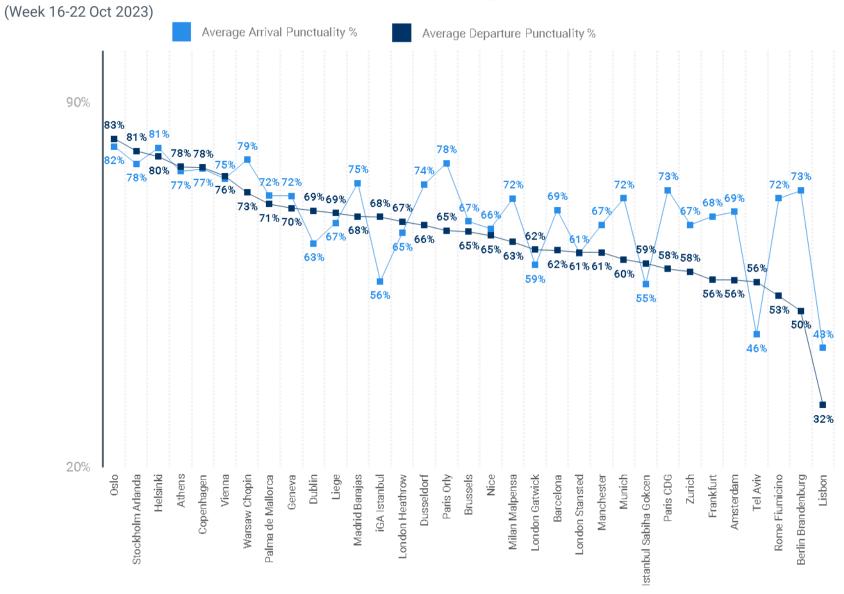
Week 16-22 Oct 2023

No.	Airport	Avg. daily dep/arr flights	% prev week	vs 2022	vs 2019
1.	Amsterdam	1,401	-0%	↑ +16%	→ -6%
2.	iGA Istanbul	1,382	-1%	↑ +17%	↑ +14%
3.	Frankfurt	1,314	-1%	↑ +15%	▼ -12%
4.	Paris Charles de Gaulle	1,314	+0%	↑ +10%	→ -9%
5.	London Heathrow	1,300	-1%	↑ +18%	▼ -3%
6.	Madrid Barajas	1,110	-0%	↑ +8 %	▼ -7%
7.	Munich	945	-2%	↑ +7%	▼ -22 %
8.	Barcelona	939	+1%	↑ +7%	♦ -4%
9.	Rome Fiumicino	815	-1%	↑ +30%	→ -7%
10.	Antalya	788	-7%	↑ +7%	↑ +3%

- In some changes in the ranking compared to the previous edition, Amsterdam has moved to first, while Frankfurt and Paris CDG have swapped places, as have Rome and Antalya.
- Only one airport recorded growth vs the previous week: Barcelona (+1%,).
- All airports have experienced sustained growth vs 2022, ranging from +7% (Munich, Barcelona or Antalya) to +30% (Rome Fiumicino).
- Two top 10 airports (iGA Istanbul and Antalya) are currently handling traffic above their 2019 levels.



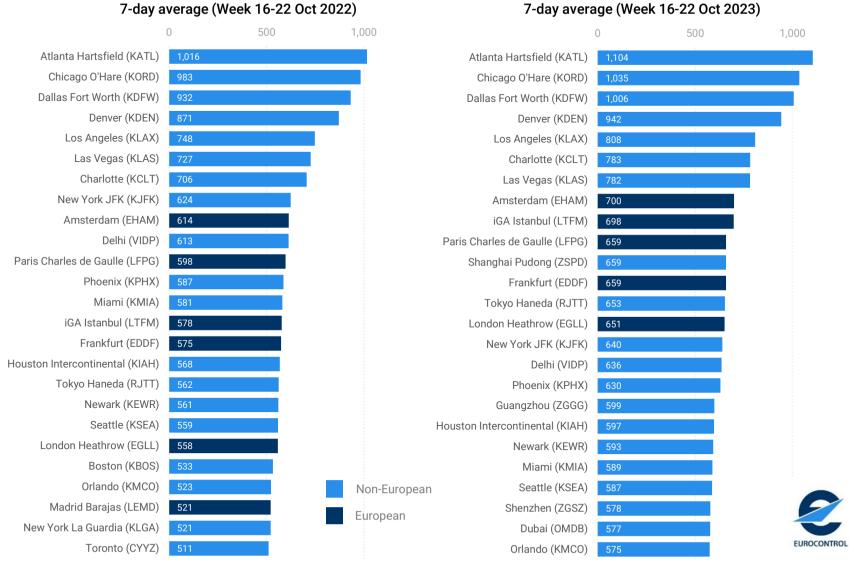
Average arr/dep punctuality at main airports



- 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. Since the beginning of October, 2023 punctuality figures have improved, but are still below 2019 levels.
- Arrival punctuality is higher (i.e. better) than departure punctuality at most airports.
- However, a few airports (notably Oslo, Stockholm, Athens, Dublin, Liège, iGA Istanbul, London Heathrow, London Gatwick, Istanbul Sabiha Gökçen and Tel Aviv) 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)



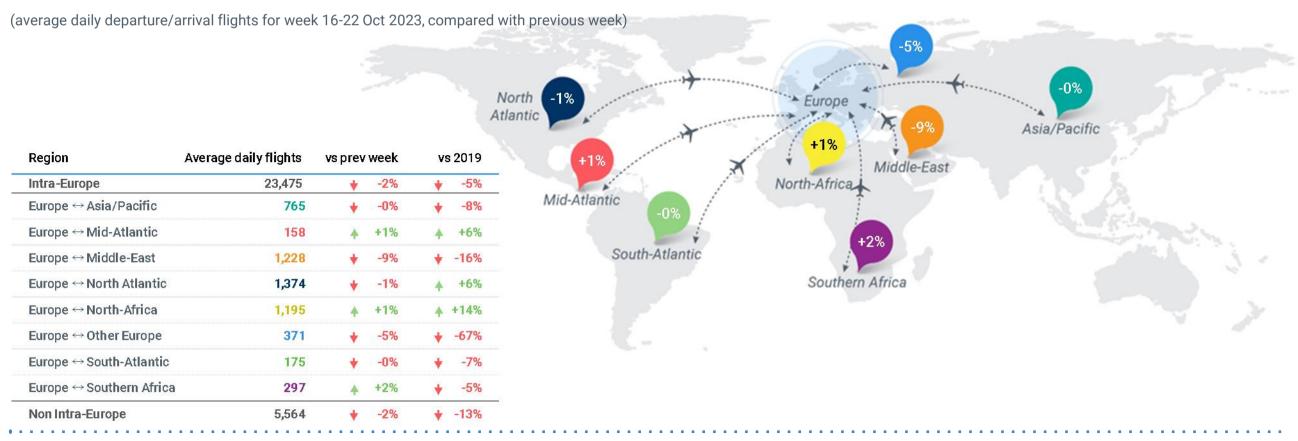
500 1.000

Over the week 16-22 October 2023:

- Five European airports are ranked in the top 25 of global airport departures compared to six in 2022: Madrid does not make the 2023 list
- The highest ranked European airport (8th) is Amsterdam, moving up one place compared to 2022.
- The other European airports to make the top 25 are iGA Istanbul (9th), Paris CDG (10th), Frankfurt (12th) and London Heathrow (14th).

Source: Flightradar24 Historical Global Utilisation data

Traffic flows



- The main traffic flow was intra-European with 23,475 daily flights last week, fewer (-2%) than the previous week. Intercontinental flows resulted in 5,564 daily flights on average last week, -2% vs the previous week.
- The second-largest regional flow is between Europe and the North Atlantic: 1,374 average daily flights last week, a decrease of 1% vs the previous week and outpacing the Europe \leftrightarrow Middle-East flow.
- The third flow is now to/from the Middle East with 1,228 daily flights, 9% below the previous week's value, mainly due to a decrease in flows with Israel (-42% for the week 15-21 October 2023 vs the same week in 2022).
- The fourth flow is to/from North Africa, with 1,195 flights per day, 1% higher compared to the previous week's value.
- The fifth flow is to/from Asia/Pacific; the latter has now largely recovered to only -8% compared to 2019. European flows with China (including Hong Kong) were at 227 daily flights last week (slightly higher than in the last edition).
- Flows with Other Europe (including the Russian Federation) remain massively reduced at -67% compared to 2019.

Top 10 long-haul country pairs

(average daily departure/arrival flights for the last week)
Week 16-22 Oct 2023

No.	Country pair	Average daily flights	% prev week	% prev year	% 2019
1.	UK ↔ US	331	-1%	↑ +18%	↑ +9%
2.	Germany ↔ US	166	-1%	↑ +4%	↑ +2%
3.	France ↔ US	129	-1%	↑ +19%	↑ +3%
4.	Italy ↔ US	83	-0%	↑ +18%	♦ +11%
5.	Netherlands \leftrightarrow US	81	-1%	↑ +7%	♦ -4%
6.	$\textbf{Ireland} \leftrightarrow \textbf{US}$	70	-1%	♦ +15%	↑ +7%
7.	Spain ↔ US	69	+2%	♦ +9%	♦ +0%
8.	$UAE \leftrightarrow UK$	60	+6%	♦ +9%	♦ -9%
9.	Türkiye ↔ US	45	+2%	+40 %	+88 %
10.	Switzerland ↔ US	43	-2%	↑ +25%	♦ +11%



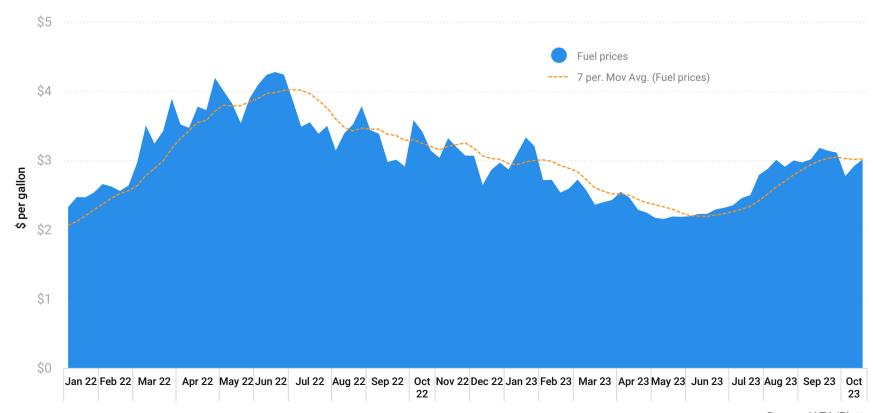
- Since the last edition, there has been one change in the rankings for the top 10 long-haul country pairs: Switzerland ↔ US and Türkiye ↔ US have swapped places.
- All but three of the flows posted a decrease vs the previous week.
- Nine of the top 10 long-haul country pairs are with the US, the main three being between the US and the UK, Germany and France.
- All flows posted an increase on the same week in 2022.
- All but two flows are currently at or above 2019 levels, the exception being Netherlands ↔ US and UAE ↔ UK.

Economics

Week 16-22 Oct 2023



Jet fuel price (Europe)

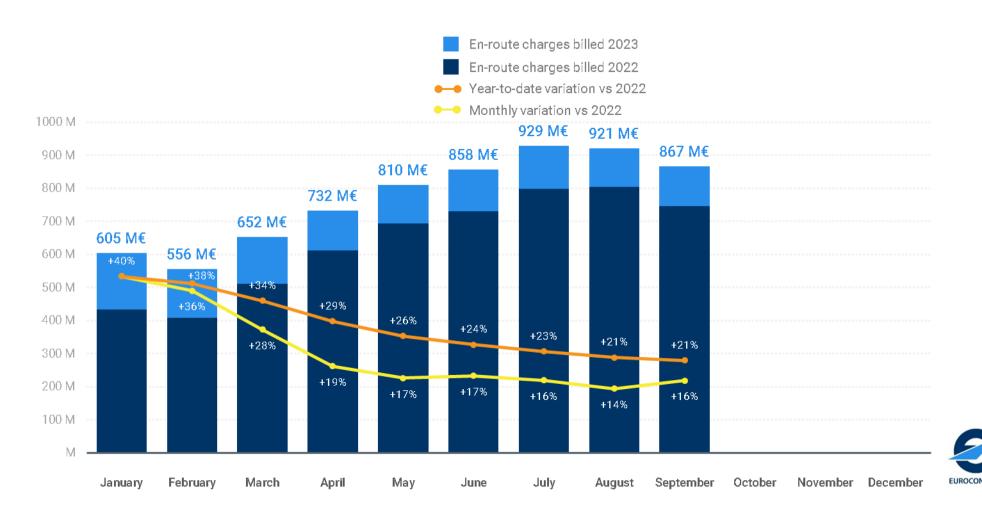


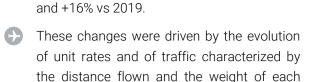
Source: IATA/Platts

- The average price of jet fuel stood at 3.02 USD/gallon on 20 October 2023, +9% higher compared to the last Overview, and 6% higher than the beginning of 2023.
- Based on a moving average trend, fuel prices in Europe have mainly declined between June 2022 (\$4/gallon) and June 2023 (\$2.20/gallon).
- Since June 2023, when Saudi Arabia and the Russian Federation started to cut oil production, jet fuel prices have begun to rise.
- Jet fuel prices have now jumped 28% compared to July and, on 15 September 2023, were at their highest since January 2023.

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

Year-to-date amount billed: 6,932 M€ (+21% vs 2022)





At Network level. 867M€ were billed in

September which represents +16% vs 2022

The September 2023 variation vs September 2022 (+16%) is explained by an increase in Unit Rates and an increase in average distance flown per flight (+2%) and average aircraft weight per flight (+3%).

aircraft (or Service Units).

- 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 6,932 M€, 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:

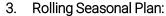
www.eurocontrol.int/Economics/

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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