



EUROCONTROL

EUROPEAN AVIATION OVERVIEW 30 Oct - 05 Nov 2023

Headlines

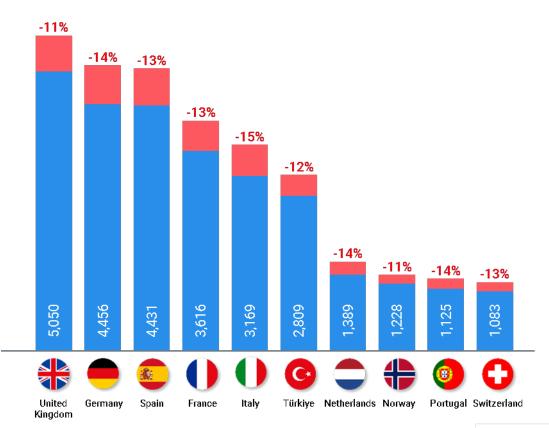
(Week 30 Oct - 05 Nov 2023)

- The Network recorded 25,915 average daily flights (+7% vs 2022). The average number of flights was 12% lower than in the previous week; the comparison is distorted by the change from Summer to Winter season (Sunday 29 October 2023).
- In October, the number of flights in the network was at 94.5% of 2019 levels.
- On average, the top 10 carriers decreased their capacities by 11% compared to the previous week (mainly owing to the change of season).
- En-route ATFM delays averaged just above 26,000 minutes per day (1.01 min/flight), with the main causes being capacity & staffing (48%) as well as weather (33%). The week registered 21% fewer delays compared to the previous week.
- Arrival and departure punctuality, at 73.8% and 69.0% respectively, were 10.2/10.0 percentage points below 2019 levels, and also lower than the equivalent week in 2022.
- The average jet fuel price stood at 2.88 USD/gallon on 03 November 2023, declining by 5% compared to two weeks ago. Current prices have reached prices comparable to the ones at the beginning of the year.

Top 10 busiest States

On week 30 Oct - 05 Nov 2023

(all flights excl. overflights compared with previous week)

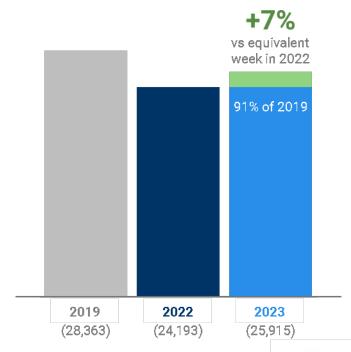


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Traffic situation

Average daily flights (including overflights)

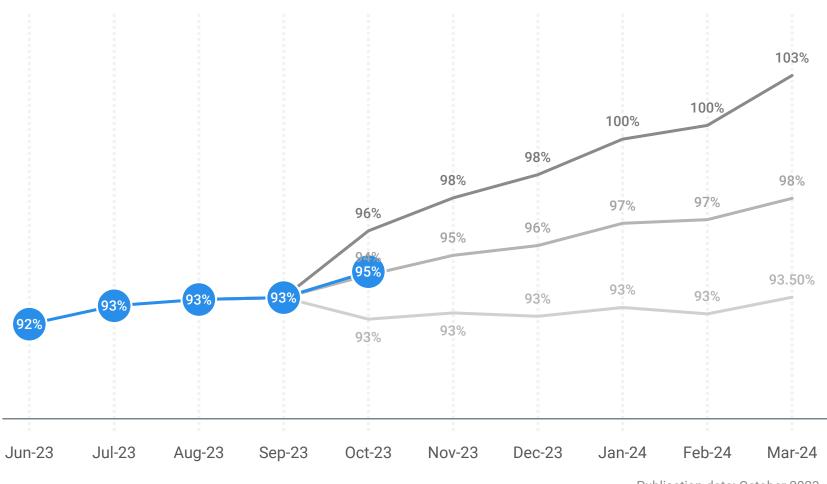
Week 30 Oct - 05 Nov 2023





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.
- For October 2023, flights closed at 94.5% (rounded to 95%) of October 2019 levels.
- On a year-to-date basis, Network traffic is at 91% of 2019, and +10% vs 2022

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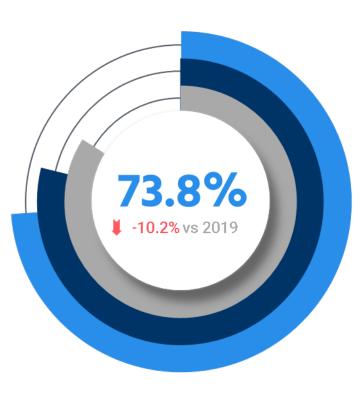
Publication date: October 2023

Arrival & departure punctuality

(all network scheduled flights)

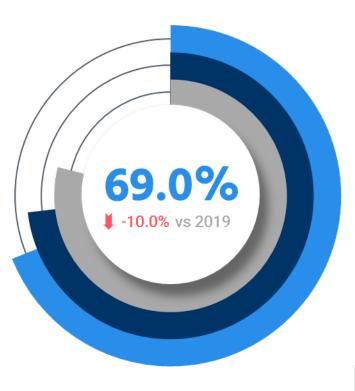
Week 30 Oct - 05 Nov 2023

ARRIVAL PUNCTUALITY



84.0% ______ in 2019 78.8% in 2022

DEPARTURE PUNCTUALITY



79.0% ______ in 2019 73.2% in 2022

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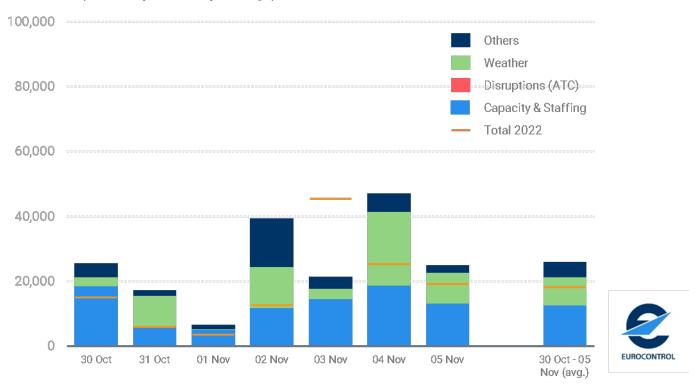
- Network punctuality deteriorated when compared to the equivalent week in 2019. Arrival punctuality was down by 10.2 percentage points to 73.8% with departure punctuality falling by 10.0 percentage points to 69.0%.
- Weather was the main delay generator during the week of 30 October to 05 November; Storm Ciaran affected network performance with high winds, rain and low visibility. Airports were the most impacted, with airports in the United Kingdom, Amsterdam, Brussels, Vienna and Paris airports seeing significant disruption.
- Elsewhere, ATC industrial action affected Lanzarote, with 04 and 05 November seeing the highest delays. Oslo airport was impacted by snow, notably on 30 October and 02 November. Istanbul saw delays due to convective activity, notably on 02 November. There were also ATC system implementations in the Canaries and Malaga that caused moderate ATFM delays throughout the week.

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

En-route ATFM delays

Delays per cause (EUROCONTROL Area)

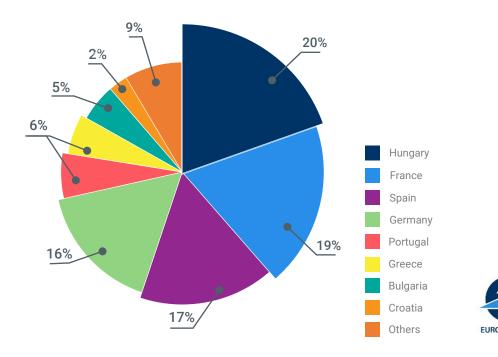
In minutes (total daily and 7-day average) in 2023



- At the end of the 30 October 05 November week, en-route ATFM delays were above 2022 levels on most days. On a 7-day average (last bar on the right), the week registered delays 42% higher than in the comparable week in 2022.
- On average, they amounted to 26,070 minutes a day, with the main cause being capacity & staffing (48%). Weather (33%) was the second biggest cause, especially on Thursday 02 November (storm Ciaran) and Saturday 04 November (storm Domingos) disrupting traffic in the UK, the Netherlands and France.

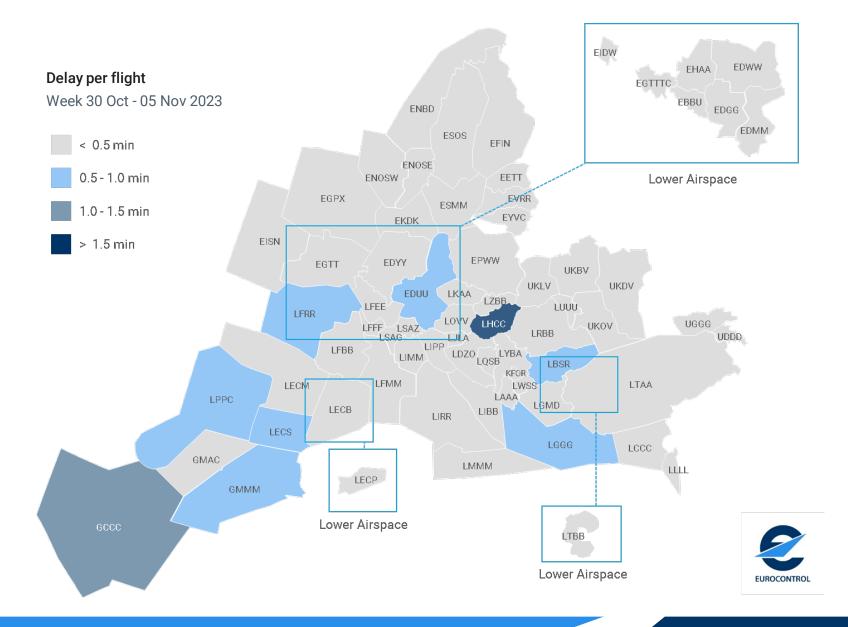
Share of en-route ATFM delays

Week 30 Oct - 05 Nov 2023



- Hungary accounted for 20% of all en-route ATFM delays, owing to capacity and staffing as well as weather issues.
- France came second with 19% of all en-route ATFM delays, mainly concentrated in the Brest (disruption and weather) and Reims ACCs.
- Spain came third with 17% of all en-route ATFM delays, mainly concentrated in Sevilla and Madrid ACCs.

En-route ATFM delayed flights per Area Control Centre



- Over the last week, en-route ATFM delays have decreased by 21% compared to the week before but are above 2022 levels (26,070 minutes per day, on average).
- Compared to the same week in 2022, en-route ATFM delays were 42% higher.
- Last week, the most affected ACCs were:
 - Budapest (2.0 min/flight), mainly owing to ATC capacity/staffing and disruptive convective weather,
 - Canaries (1.0 min/flight), limited capacity partly owing to transition to new navigation procedures, as well as strong seasonal demand,
 - Brest (0.9 min/flight), due to disruptions & weather issues caused by storm Ciaran,
 - Lisbon (0.9 min/flight), due to strong traffic demand (school holidays) to/from the Canaries, leading to exceeded capacity in some Lisbon sectors, and
 - Karlsruhe (0.6 min/flight), owing to capacity and staffing issues.
- Overall, Hungary was responsible for 20% of all en-route ATFM delays last week, followed by France (19%) and Spain (17%).

Top 10 States

Departures and arrivals

Week 30 Oct - 05 Nov 2023

See more

| No. | Country | Average daily flights | % prev week | % prev year | % 2019 |
|-----|----------------|-----------------------|-------------|---------------|---------------|
| 1. | United Kingdom | 5,050 | -11% | ↑ +11% | ♦ -9% |
| 2. | Germany | 4,456 | -14% | + +6% | ▼ -17% |
| 3. | Spain | 4,431 | -13% | ↑ +11% | ↑ +4% |
| 4. | France | 3,616 | -13% | ↑ +4% | ▼ -8% |
| 5. | Italy | 3,169 | -15% | ↑ +15% | ♦ -1% |
| 6. | C· Türkiye | 2,809 | -12% | ↑ +10% | + +6% |
| 7. | Netherlands | 1,389 | -14% | + +4% | ▼ -12% |
| 8. | Norway | 1,228 | -11% | ▼ -6% | ▼ -14% |
| 9. | Portugal | 1,125 | -14% | + +9% | ↑ +10% |
| 10. | Switzerland | 1,083 | -13% | + +3% | ♦ -7% |

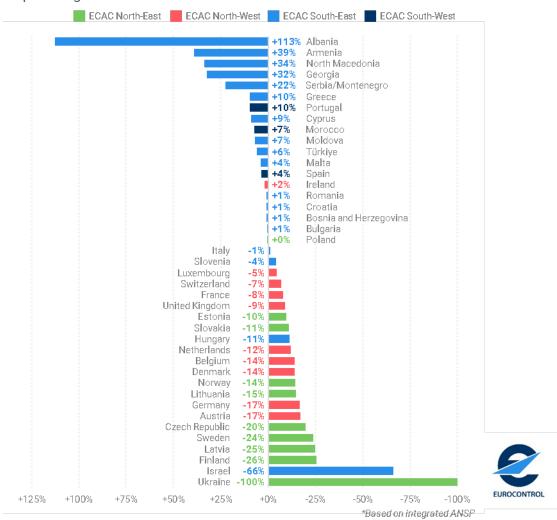


- The top 10 States, in aggregate, recorded fewer flights compared to the previous week (-13%).
- Compared to the previous edition: Greece is no longer in the top 10 but Switzerland now is.
- All States recorded fewer flights compared to the previous week, mainly as a result of the shift from Summer to Winter season. Italy, Germany and the Netherlands posted the highest decreases.
- Three States within the top 10 are recording traffic above 2019 (Spain, Türkiye, and Portugal). Italy is just 1% below the 2019 levels. The six remaining States are still between 17% and 7% below pre-COVID levels.

States in the EUROCONTROL Network

Compared to the equivalent week in 2019

Dep/Arr flights for week 30 Oct - 05 Nov 2023



Top 10 aircraft operators

Week 30 Oct - 05 Nov 2023 (avg daily flights)

See more

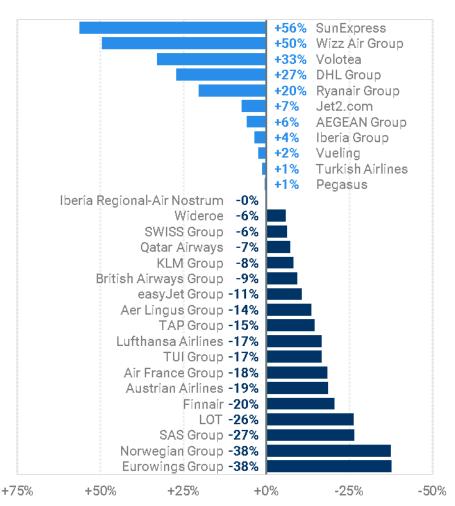
| No. | Aircraft operator | Average daily flights | % prev week | % prev year | % 2019 |
|-----|-----------------------|-----------------------|-------------|---------------|---------------|
| 1. | Ryanair Group | 2,784 | -11% | +25 % | +20 % |
| 2. | easyJet Group | 1,422 | -16% | +20 % | ▼ -11% |
| 3. | Urkish Airlines | 1,269 | -10% | +2 % | ↑ +1% |
| 4. | Lufthansa Airlines | 1,191 | -7% | + +5% | ▼ -17% |
| 5. | Air France Group | 938 | -8% | ♦ -6% | ▼ -18% |
| 6. | Wizz Air Group | 790 | -4% | ↑ +15% | ↑ +50% |
| 7. | British Airways Group | 788 | -5% | ↑ +12% | ♦ -9% |
| 8. | KLM Group | 724 | -15% | ↑ +12% | ▼ -8% |
| 9. | SAS Group | 604 | -15% | ↑ +3% | ▼ -27% |
| 10. | (voling) Vueling | 532 | -15% | ↑ +7% | ↑ +2% |



- The top 10 aircraft operators posted a decrease in the number of flights (-11% on average) compared to the previous week, owing to the change in season.
- Biggest decreases were on flows UK ↔ Spain (easyJet, Ryanair), Germany ↔ Spain, (Lufthansa airlines, Ryanair) and Germany ↔ Greece (Lufthansa airlines).
- Last week, four airlines within the top 10 had flight numbers above 2019 levels: +50% (Wizz Air Group), +20% (Ryanair Group), +2% (Vueling) and +1% (Turkish Airlines).

Aircraft operators in the EUROCONTROL Network

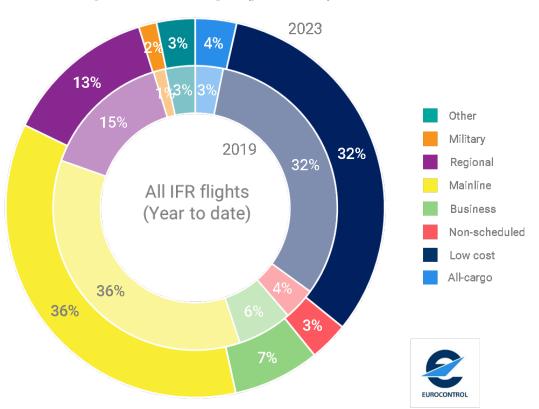
Compared to the equivalent week in 2019 Dep/Arr flights for week 30 Oct - 05 Nov 2023





Market segments in the EUROCONTROL Network

Average share of total flights (year to date)



| No. | Mar | ket segment | Avg. flights | % prev week | % prev year | % 2 | 2019 |
|-----|-------------|---------------|--------------|-------------|---------------|------------|------|
| 1. | ^ | Mainline | 9,755 | -8% | ↑ +14% | * | -3% |
| 2. | † | Low Cost | 8,345 | -15% | ↑ +12% | + | -5% |
| 3. | † \o | Regional | 3,475 | -8% | ↑ +1% | + - | -18% |
| 4. | W | Business | 1,533 | -18% | ▼ -13% | | +6% |
| 5. | ÷, | All-cargo | 964 | -5% | ♦ -8% | | +4% |
| 6. | | Other | 722 | -19% | ◆ -17% | + - | -14% |
| 7. | | Non-Scheduled | 706 | -17% | ↑ +1% | + - | -17% |
| 8. | ^ : | Military | 416 | -17% | ↑ +17% | 4 + | +27% |

Major market segments (Mainline and Low-Cost) recorded the same market shares in 2023 (year-to-date) as in 2019 (comparable period). Regional and Non-Scheduled market shares slightly reduced (-2 pp and -1 pp, respectively) while the All-Cargo and Business Aviation market shares slightly expanded (+1 pp each).

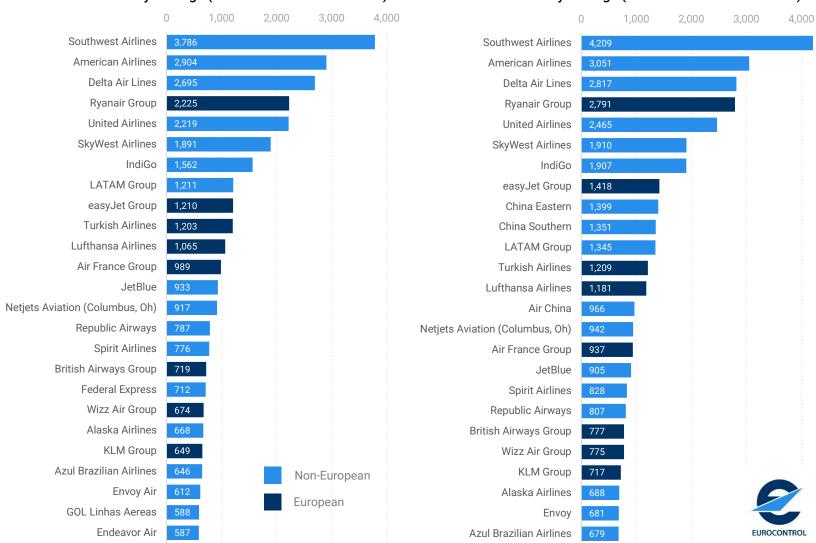
Compared to 2022, passenger markets recorded growth in the number of flights operated: Mainline (+14%), Low-cost (+12%), Non-Scheduled (+1%) and Regional (+1%).

On the other hand, Business Aviation and All-cargo (-13% and -8% respectively) are now recording fewer flights in 2023 compared to 2022 levels.

Top 25 global aircraft operators

(average daily departure flights)





7-day average (Week 30 Oct - 05 Nov 2023)

Over the last week:

- Eight European airlines are ranked in the top 25 global aircraft operators (same airlines in 2022).
- The first European aircraft operator is Ryanair (ranked 4th) the same rank as a year ago.
- The only other European airline in the global top 10 is easyJet (8th).
- Six more airlines make the top 25: Turkish Airlines (12th), Lufthansa (13th), Air France (16th), British Airways (20th), Wizz Air (21st) and KLM (22nd).

Source: Flightradar24 Historical Global Utilisation data

Top 10 airports



Airport ranking

Week 30 Oct - 05 Nov 2023

See more

| No. | Airport | Avg. daily dep/arr flights | % prev week | % 2022 | % 2019 |
|-----|-------------------------|----------------------------|-------------|----------------|----------------|
| 1. | iGA Istanbul | 1,283 | -7% | ↑ +5% | ↑ +11% |
| 2. | London Heathrow | 1,255 | -4% | + +8 % | ♦ -3% |
| 3. | Paris Charles de Gaulle | 1,240 | -5% | ↑ +7% | ♦ -6 % |
| 4. | Frankfurt | 1,210 | -7% | ↑ +9% | ♦ -10% |
| 5. | Amsterdam | 1,179 | -12% | + +8 % | ♦ -11% |
| 6. | Madrid Barajas | 1,077 | -3% | + +6% | → -7% |
| 7. | Barcelona | 872 | -8% | ↑ +16% | + +0% |
| 8. | Munich | 856 | -9% | ↑ +5% | ▼ -21 % |
| 9. | Rome Fiumicino | 750 | -7% | ↑ +29 % | ♦ -3% |
| 10. | London Gatwick | 635 | -19% | ↑ +11% | ♦ -9% |

- Some changes in the ranking compared to the previous edition:

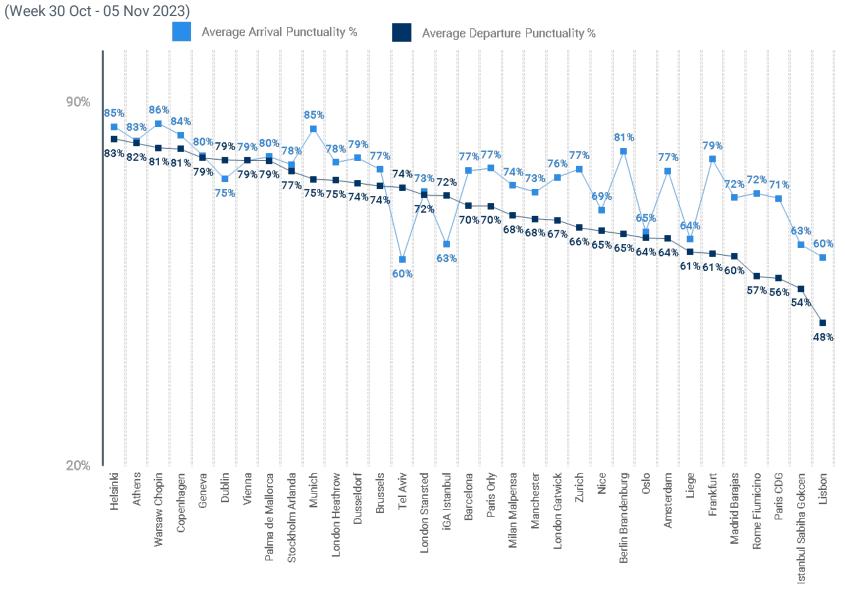
 iGA Istanbul airport has moved (back) to the top spot. Antalya is no longer in this top 10 (end of the summer season) but London
- No airport recorded growth vs the previous week.

Gatwick entered it.

- All airports experienced growth vs 2022, ranging from +5% (iGA Istanbul and Munich) to +29% (Rome Fiumicino).
- Only one of the top 10 airports (iGA Istanbul) is currently handling traffic above its 2019 levels. Barcelona airport is reaching similar traffic levels to those in 2019.



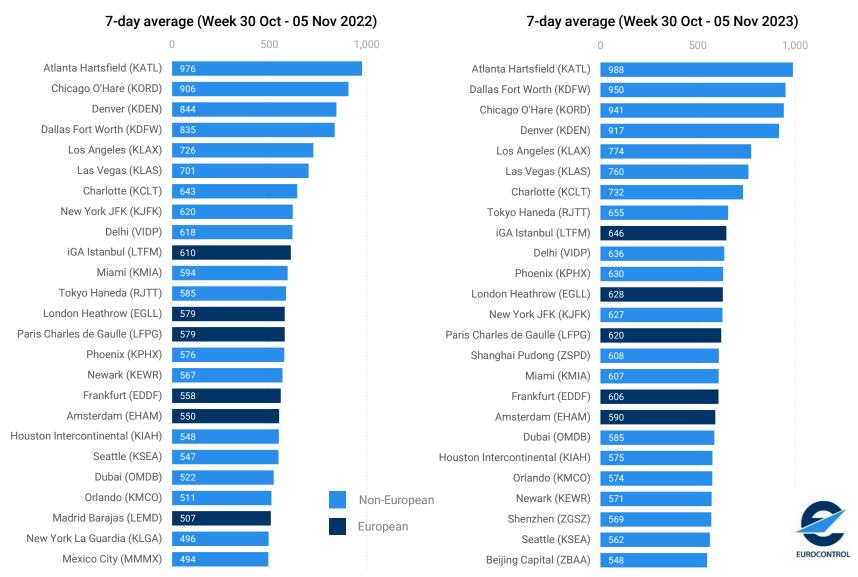
Average arr/dep punctuality at main airports



- 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. From July to October, arrival and punctuality figures deteriorated again compared to 2019.
- Since the beginning of the year:
 - Arrival punctuality is 70.6% in 2023,
 7 percentage points below the same period in 2019,
 - Departure punctuality is 64.7%, in 2023, 7.3 percentage points below 2019 figure.
- Arrival punctuality is higher (i.e. better) than departure punctuality at most airports.
- However, a few airports (Dublin, Tel Aviv 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)



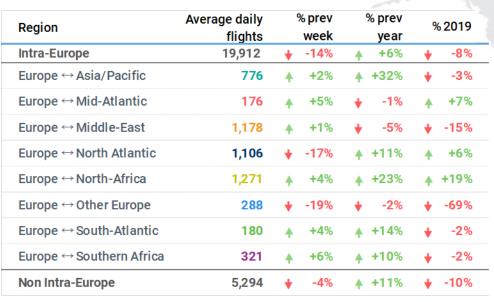
Over the last week

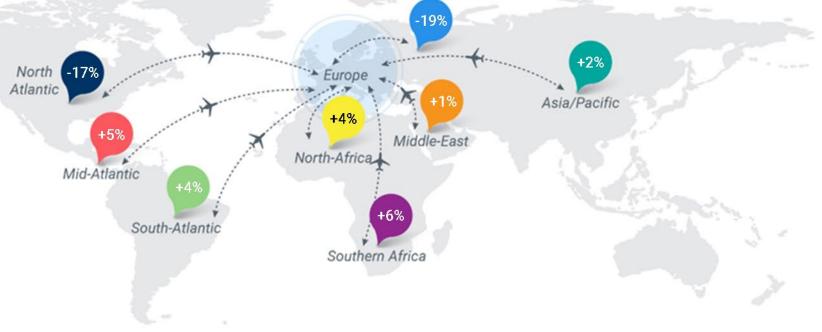
- Five European airports are ranked in the top 25 of global airport departures (compared to six in 2022: Madrid does not make the 2023 list).
- The highest ranked European airport (9th) is iGA Istanbul Airport; it was ranked 10th in 2022.
- The other European airports in the top 25 are London Heathrow (12th), Paris CDG (14th), Frankfurt (17th) and Amsterdam (18th),

Source: Flightradar24 Historical Global Utilisation data

Traffic flows

(average daily departure/arrival flights for week 30 Oct - 05 Nov 2023)





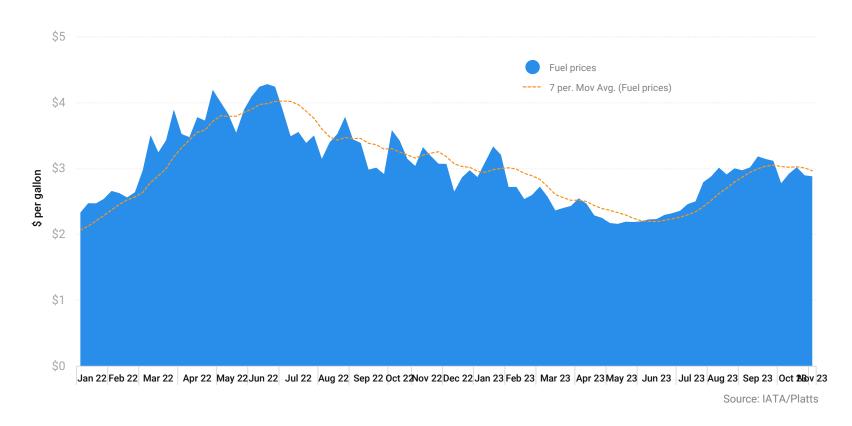
- The main traffic flow was intra-European with 19,912 daily flights last week, fewer (-14%) than the previous week. Intercontinental flows resulted in 5,294 daily flights on average last week, -4% vs the previous week.
- The second-largest regional flow is between Europe and North-Africa (outpacing Middle-East): 1,271 average daily flights last week represented an increase of 4% vs the previous week (increases on flows from/to Egypt, Morocco and Libya).
- The third flow is to/from Middle-East with 1,178 daily flights, 1% higher than the previous week.
- The fourth flow is to/from North-Atlantic, with 1,106 flights per day, decreased (-17%) vs the previous week's value (especially owing to the change in season)
- Flows with Other Europe (including the Russian Federation) remain massively reduced at -69% compared to 2019.
- Flows between Europe and Asia/Pacific have now largely recovered to only -8% compared to 2019. European flows with China (including Hong Kong) were at 232 daily flights last week (2% higher than in the last edition).

Economics

Week 30 Oct - 05 Nov 2023



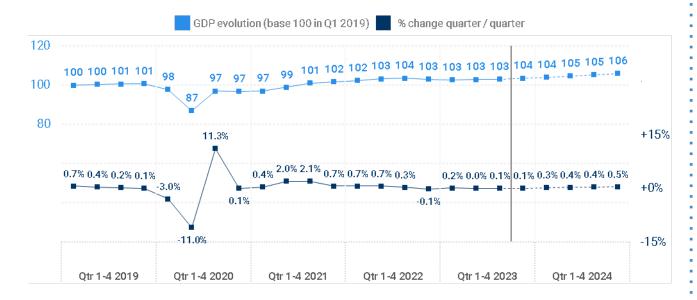
Jet fuel price (Europe)



- The average price of jet fuel was at 2.88 USD/gallon on 03 November 2023, lower (-5%) compared to the last Overview, and similar to 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 began to rise after Saudi Arabia (and the Russian Federation) started to cut oil production. However, since September a slight decline has occurred.

GDP in the European Union

Constant prices and exchange rate, Euro

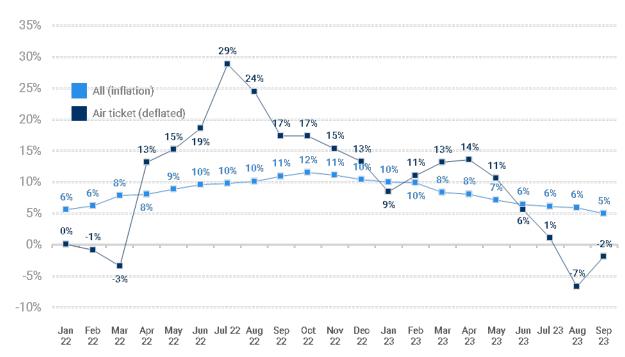


Source: Oxford Economics Ltd.

- 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 and slightly increased during Q3 2023 (+0.1%). The EU27 quarterly forecast rates for Q4 2023 is stable, expected to record 0.1% on the previous quarter.
- 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:

- In September 2023, all-prices inflation stood at 5%; ticket prices decreased by 2% (excluding inflation).
- August 2023 recorded the biggest decrease in air ticket prices since March 2022.
- The decrease in air ticket prices in August 2023 was particularly large because prices had surged in August 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.

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.









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