AVIATION INTELLIGENCE+

EUROCONTROL

EUROPEAN AVIATION OVERVIEW

24-30 Jul 2023

Tuesday 1 August 2023

Headlines

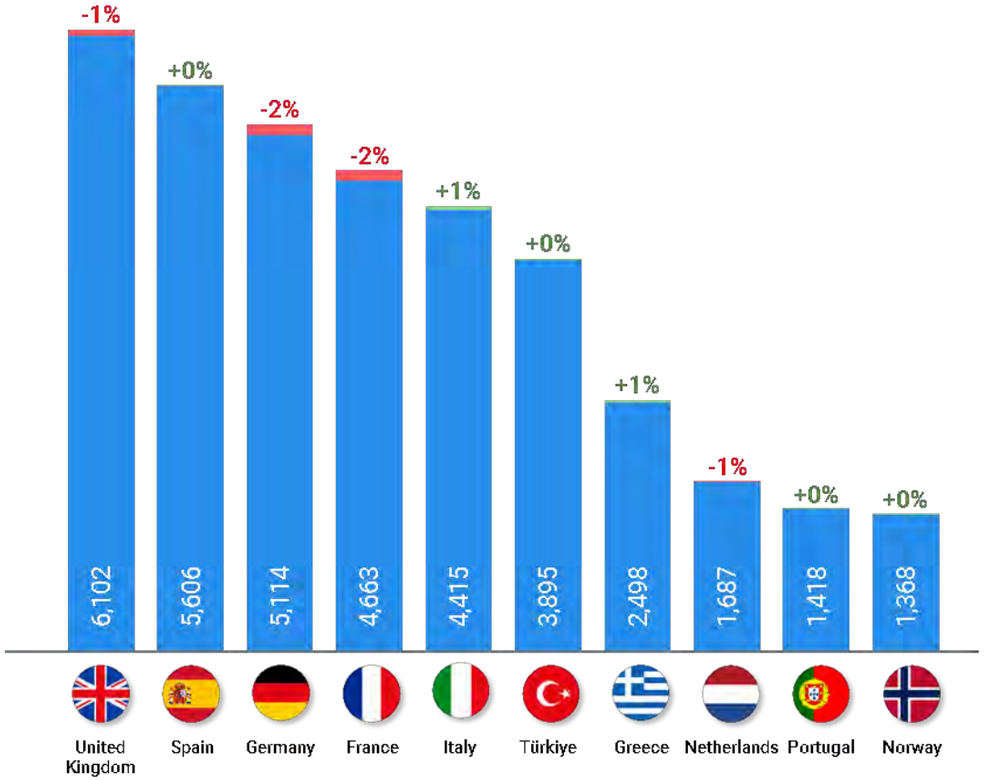
(Week 24-30 Jul 2023)

- The Network recorded 32,767 average daily flights (+7% vs 2022), remaining stable (-0.7%) vs the previous week and standing at 94% of 2019 levels.
- Since the post-COVID record number of flights (34,637 on Friday 7 July 2023) the traffic levels for the last week of July remain in line with those of the previous weeks .
- In July, the number of flights in the Network was 93% of 2019 levels, just below our Base scenario of forecasted flights released in December 2022.
- On average, the top 10 aircraft operators recorded similar flight volumes vs the previous week.
- Arrival and departure punctuality deteriorated, both closing at 9 percentage points below 2019.
- The jet fuel price closed at 2.80 USD/gallon on 28 July 2023, an increase of +14% over two weeks. Current prices have however decreased by 3% compared to the beginning of the year.

Top 10 busiest States

On week 24-30 Jul 2023

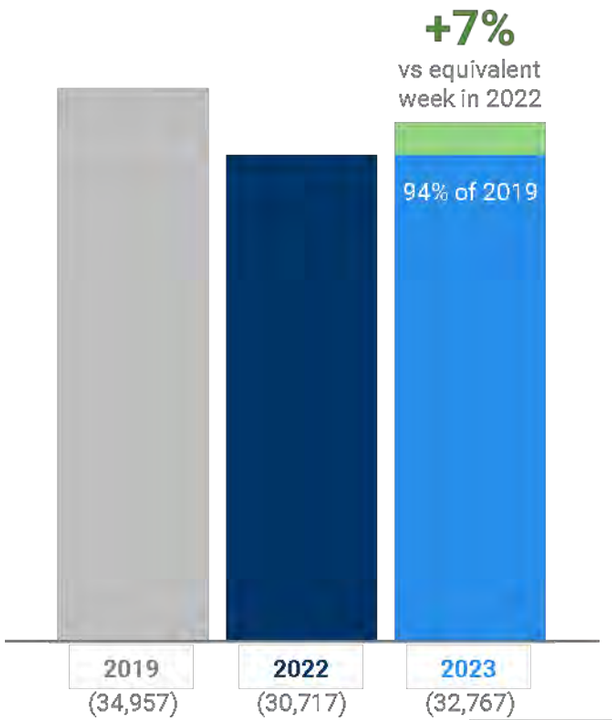
(all flights incl. overflights compared with previous week)



Traffic situation

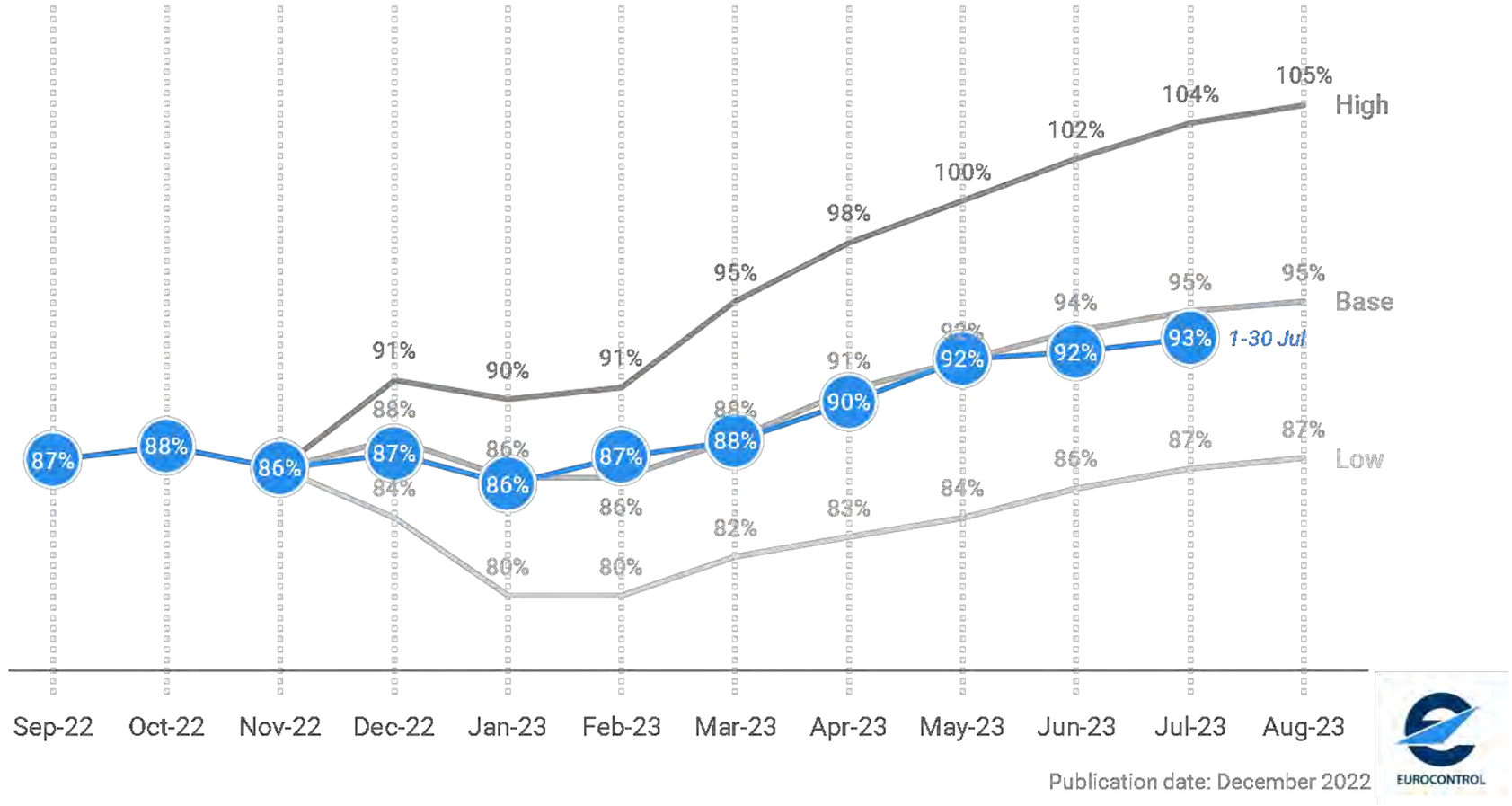
Average daily flights (including overflights)

Week 24-30 Jul 2023



Overall situation compared to the EUROCONTROL Traffic Scenarios

(base year 2019)



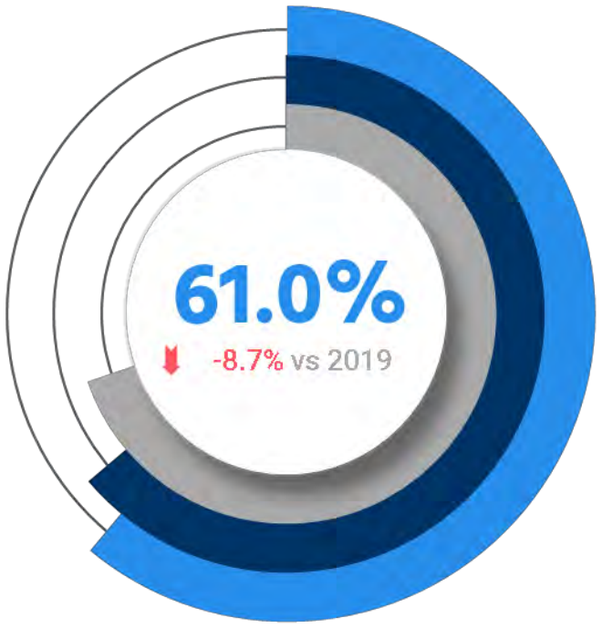
- The latest EUROCONTROL traffic scenarios were published on 16 December 2022.
- Since that date, Network traffic has evolved largely in line with our Base scenario.
- For 1-30 July, flights were at 93% of July 2019 levels, just below our Base scenario (95%).
- On a year-to-date basis, Network traffic is at 90% of 2019, and +12% vs 2022

Arrival & departure punctuality

(at top airports for the last week)

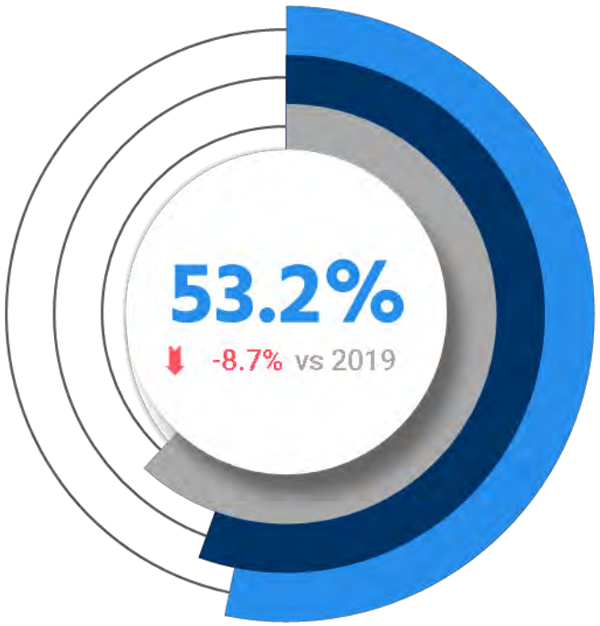
Week 24-30 Jul 2023

ARRIVAL PUNCTUALITY



69.8% _____ in 2019
63.8% _____ in 2022

DEPARTURE PUNCTUALITY



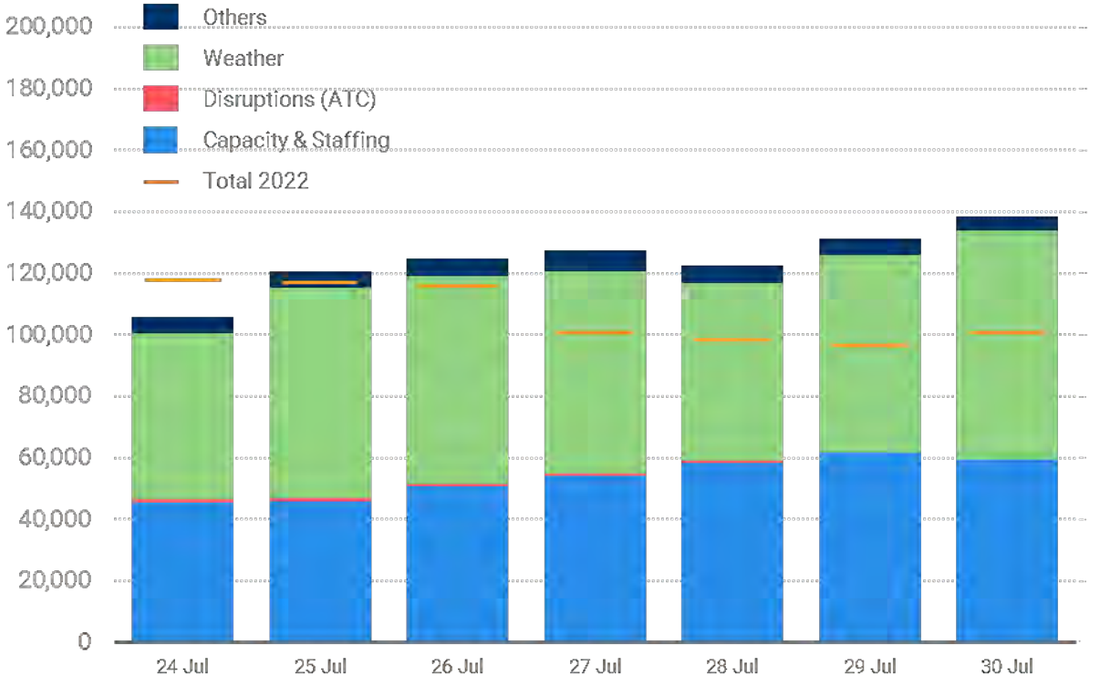
61.9% _____ in 2019
55.5% _____ in 2022

- Network punctuality was worse than in the equivalent week in 2019, with arrival punctuality at 61.0% and departure punctuality at 53.2%, each decreasing by 8.7 percentage points. This was also a deterioration, although much smaller, compared to the same period in 2022.
- Seasonal weather, ATC capacity and ATC staffing delays strongly influenced en-route ATFM delays across the Network last week. A low pressure cold front over Northern Europe moving from West to East caused strong convective weather on 29-30 July resulting in high ATFM delay. A fire in the terminal at Catania airport on 16 July continued to impact the punctuality with the capacity still reduced and operations limited to Schengen flights only. London Gatwick was impacted by aerodrome capacity regulations throughout the week. Athens, as well as many Greek island airports, was affected by ATC and aerodrome capacity delays throughout the week.

En-route ATFM delays

Delays per cause (EUROCONTROL Area)

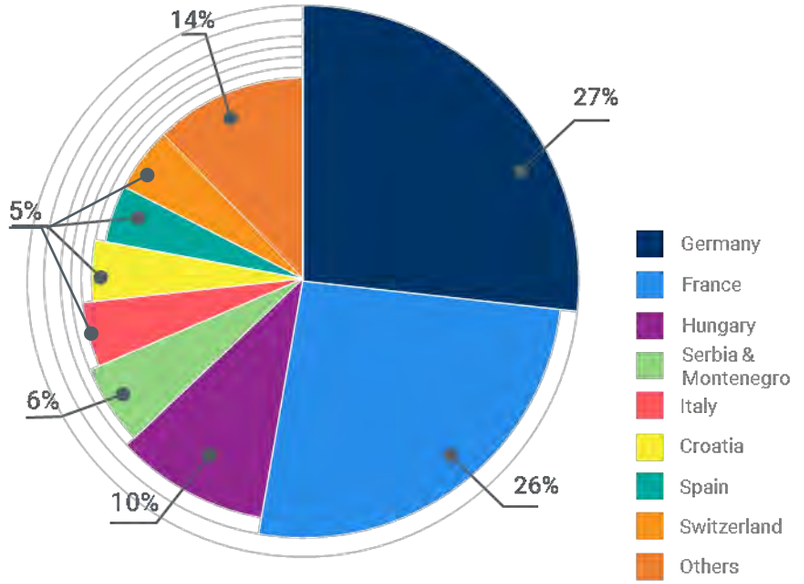
In minutes (7-day average) in 2023



- For the period 24-30 July, en-route ATFM delays were higher than in 2022 (7-day average shown in graph).
- On average, they amounted to 138,600 minutes a day, with the main causes being weather as well as capacity & staffing.

Share of en-route ATFM delays

Week 24-30 Jul 2023



- Germany accounted for 27% of all en-route ATFM delays, mainly concentrated in the Karlsruhe and Munich ACCs.
- France came second with 26% of all en-route ATFM delays, mainly concentrated in the Marseille and Reims ACCs.
- Hungary came third with 10% of all en-route ATFM delays.

Top 10 States

Departures and arrivals

Week 24-30 Jul 2023

No.	Country	Average daily flights	% prev week	% prev year	% 2019
1.	United Kingdom	6,102	-1%	+9%	-7%
2.	Spain	5,606	+0%	+6%	-1%
3.	Germany	5,114	-2%	+7%	-16%
4.	France	4,663	-2%	+2%	-6%
5.	Italy	4,415	+1%	+6%	-1%
6.	Türkiye	3,895	+0%	+9%	+7%
7.	Greece	2,498	+1%	+3%	+10%
8.	Netherlands	1,687	-1%	+9%	-2%
9.	Portugal	1,418	+0%	+7%	+6%
10.	Norway	1,368	+0%	-1%	-3%

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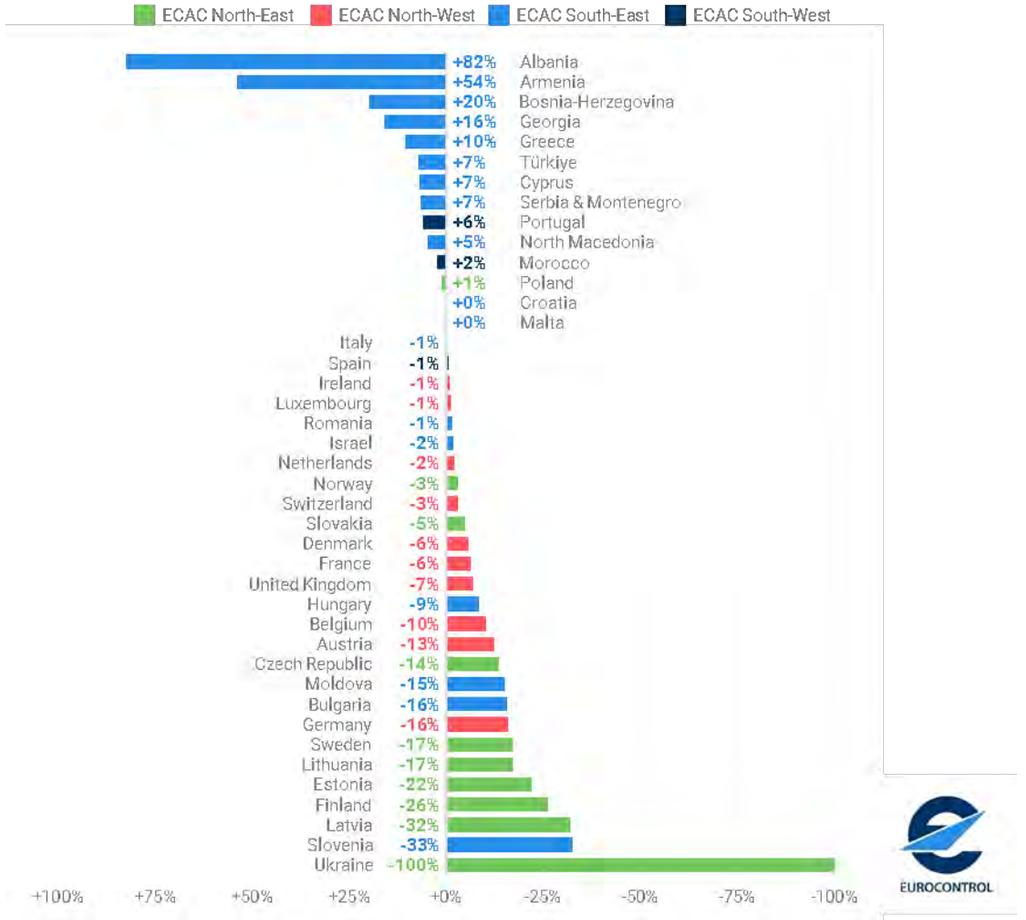
- The top 10 States recorded a similar number of flights compared to the previous week (-0.5%).
- Compared to the previous edition, the ranking remains unchanged.
- Three States within the top 10 are now recording growth above 2019 (Türkiye, Greece and Portugal) while Spain and Italy are relatively close to their pre-COVID levels. The five remaining States are still between 16% and 2% below 2019 levels.

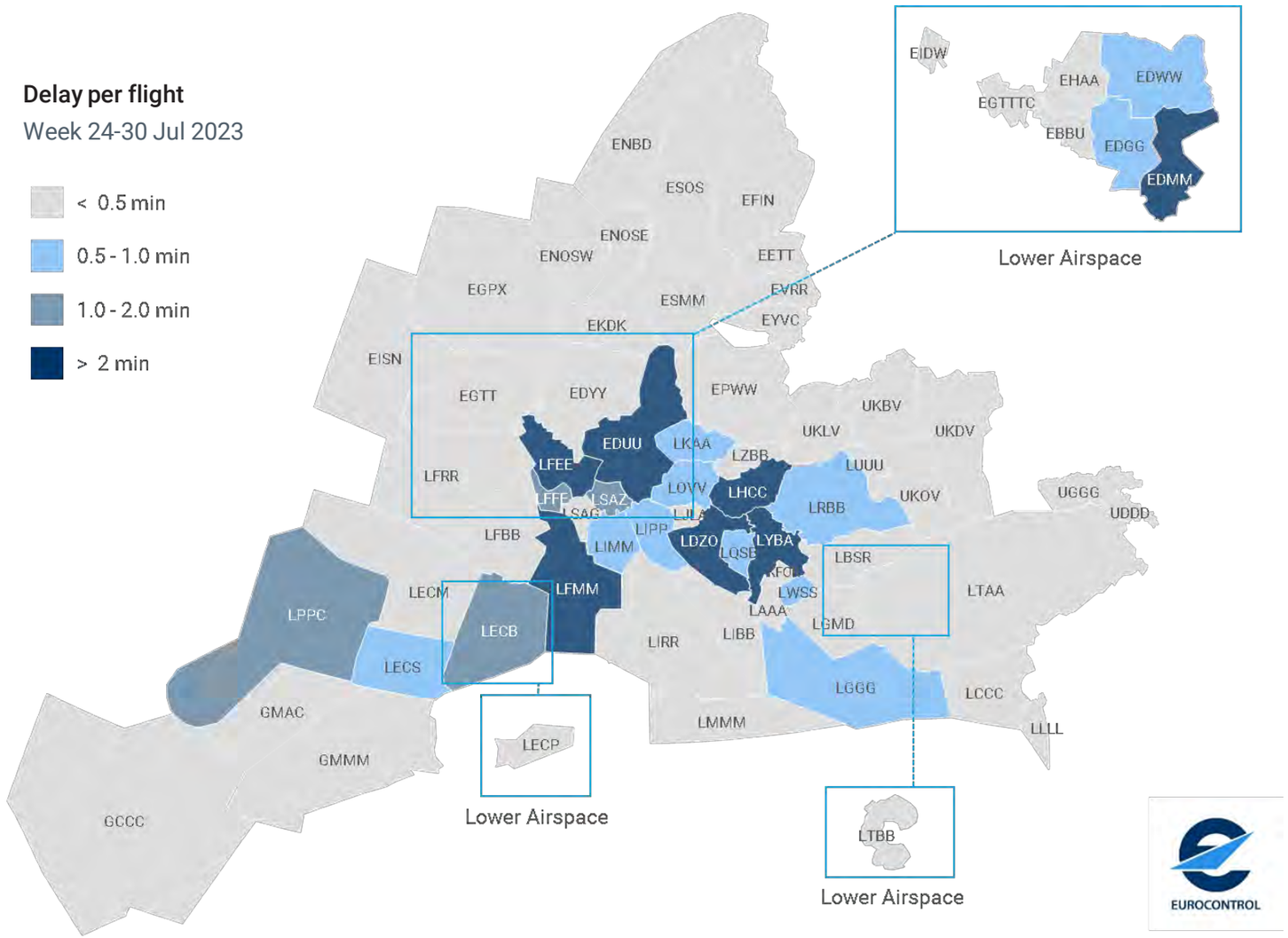
States in the EUROCONTROL Network

Compared to the equivalent week in 2019

Dep/Arr flights for week 24-30 Jul 2023



En-route ATFM delayed flights per Area Control Centre



- Over the last week, en-route ATFM delays have increased by 52% compared to the week before (138,600 minutes per day, on average).
- Compared to the same week in 2022, en-route ATFM delays were 38% higher this year. In particular, weather-related delays increased from 30,300 minutes/day in 2022 to circa 74,200 minutes/day in 2023.
- Last week, the most affected ACCs were:
  - Marseille (5.0 min/flight), owing to ongoing ATC capacity and staffing issues,
  - Karlsruhe (4.0 min/flight), owing to capacity and weather issues,
  - Budapest (3.8 min/flight), owing to weather issues and military activity,
  - Munich (3.7 min/flight), due to system implementation and transition as well as weather issues,
  - Reims (3.0 min/flight), owing to ATC capacity and staffing issues, and,
  - Belgrade (2.3 min/flight), mainly due to weather issues.
- Overall, Germany was responsible for 27% of all en-route ATFM delays last week, followed by France (26%) and Hungary (10%).

Top 10 aircraft operators

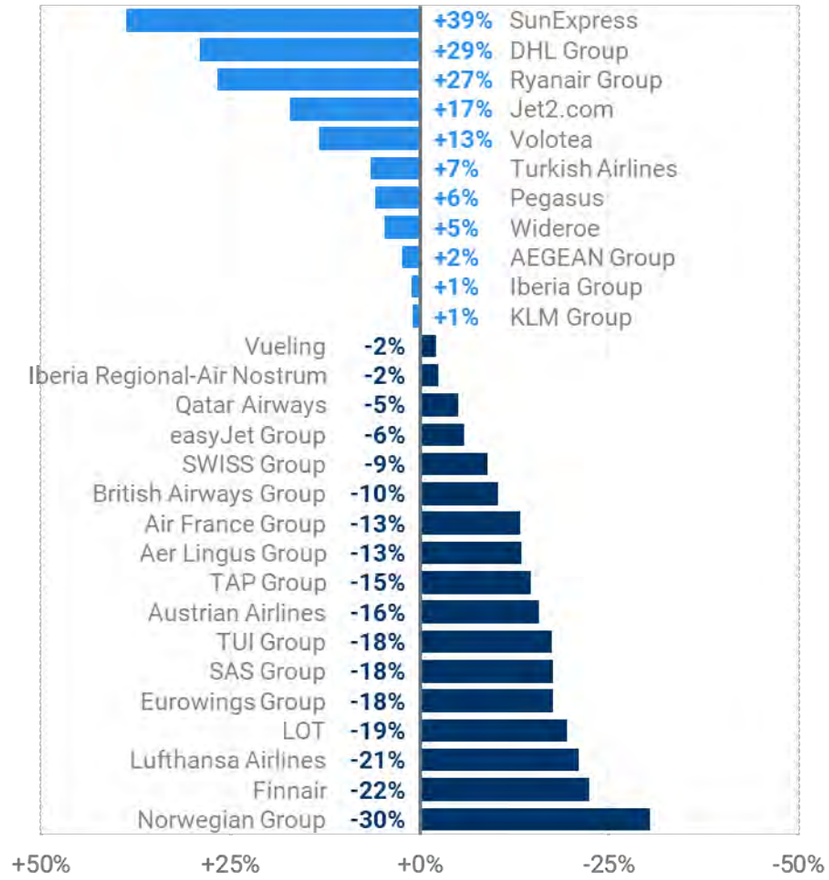
Week 24-30 Jul 2023 (avg daily flights)

No.	Aircraft operator	Average daily flights	% prev week	% prev year	% 2019
1.	Ryanair Group	3,320	-0%	+11%	+27%
2.	easyJet Group	1,734	-0%	+9%	-6%
3.	Turkish Airlines	1,571	-1%	+4%	+7%
4.	Lufthansa Airlines	1,220	-2%	+20%	-21%
5.	Air France Group	1,091	+0%	-1%	-13%
6.	Wizz Air Group	934	+2%	+17%	+41%
7.	KLM Group	901	+1%	+16%	+1%
8.	British Airways Group	844	+1%	+23%	-10%
9.	Vueling	703	-0%	-0%	-2%
10.	SAS Group	641	+0%	+13%	-18%

- On average, the top 10 aircraft operators posted a similar number of flights (-0.1%) compared to the previous week.
- Last week, only three airlines/airline groups had more daily operations compared to the week before (Wizz Air Group, KLM Group and British Airways Group).
- Wizz Air Group posted a 2% week-on-week growth adding flights mainly on the following flows: Italy ↔ Italy, Italy ↔ Spain and Czech Republic ↔ Italy.
- Four airlines within the top 10 are flying well above their 2019 flight levels: +41% (Wizz Air Group), +27% (Ryanair Group), +7% (Turkish Airlines) and +1% (KLM Group).

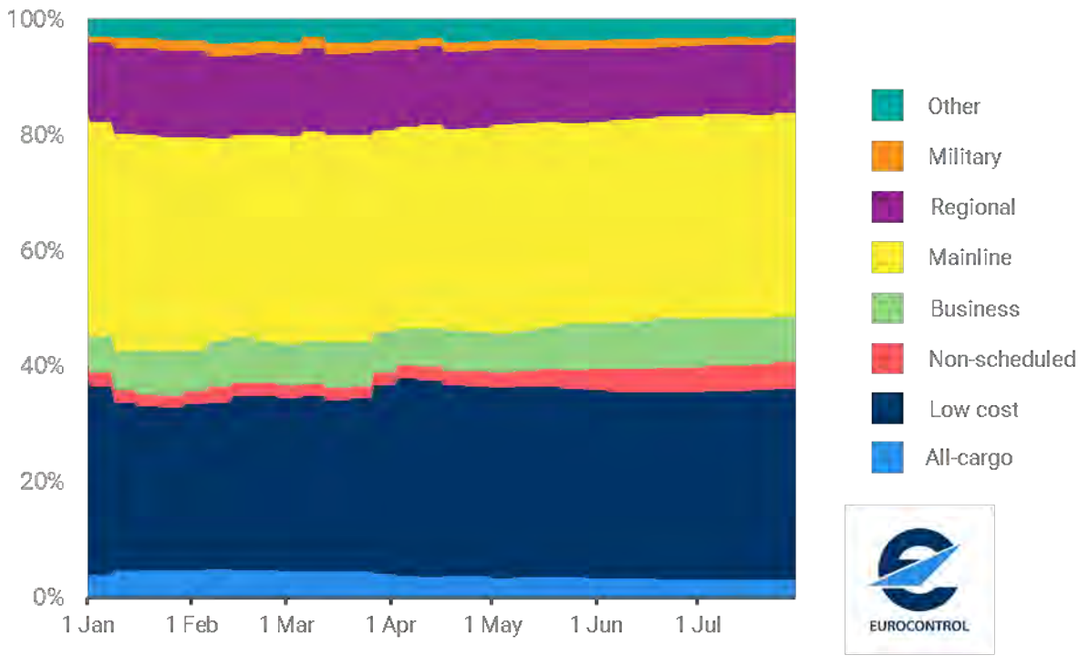
Aircraft operators in the EUROCONTROL Network

Compared to the equivalent week in 2019
Dep/Arr flights for week 24-30 Jul 2023

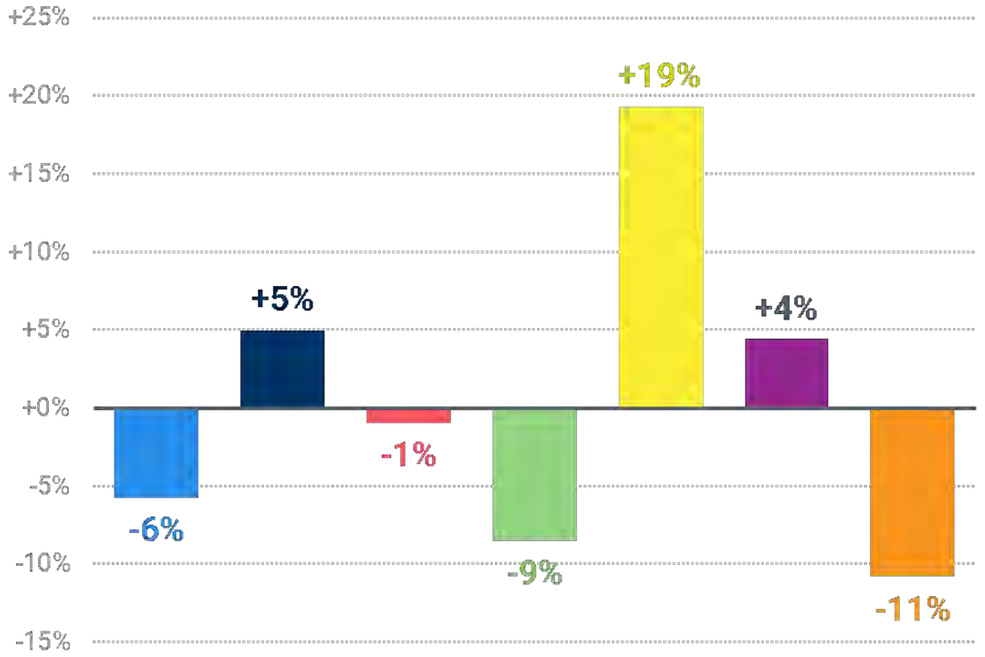


Market segments in the EUROCONTROL Network

7-day average share of total flights



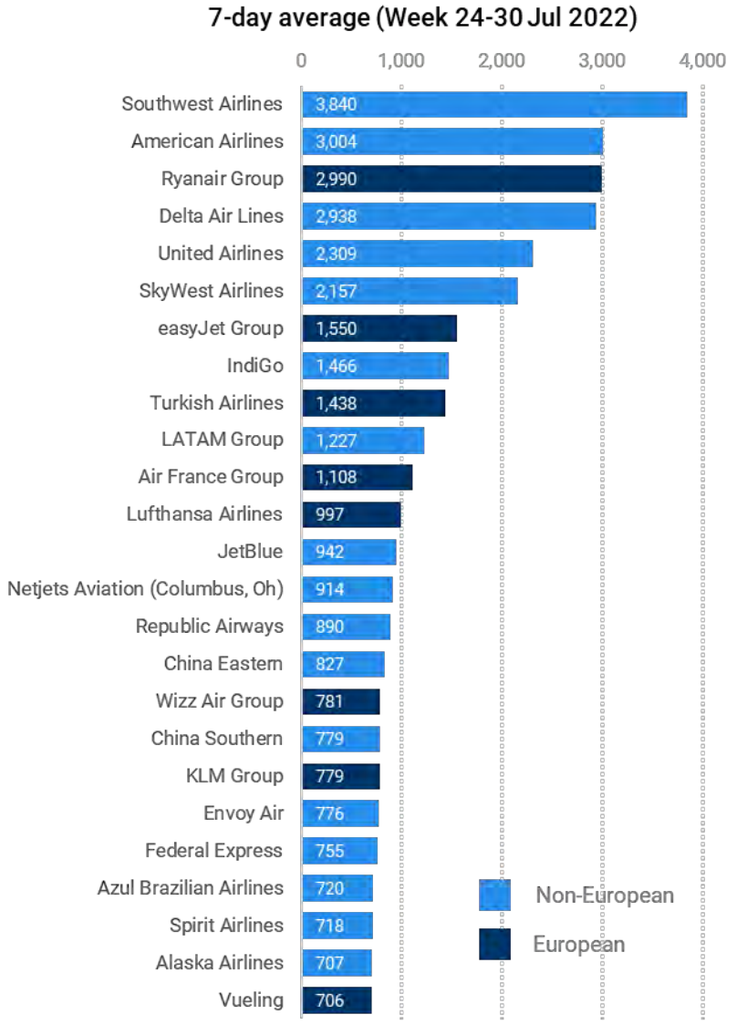
Week 24-30 Jul 2023 (vs 2022)

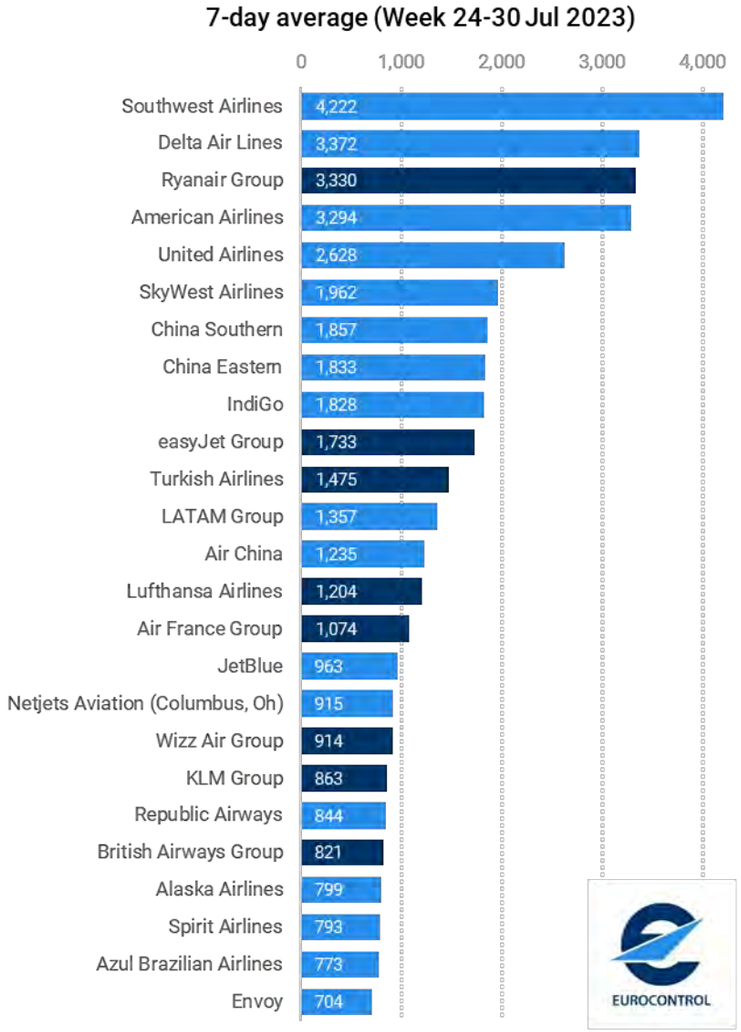


- Compared to 2022, the Mainline (+19%), Regional (+4%), and Low-cost (+5%) sectors are recording growth, reflecting their continuing recovery since the COVID-19 outbreak owing to pent-up demand and the summer season. For 1-30 July, biggest market shares of all flights are for Mainline (35.2%) and Low-cost (32.9%) while Regional, third biggest segment, accounts for 12% of total flights.
- 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 3.0% of all flights for July 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 (8.2% of total flights in July 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 July 2023, recorded fewer flights (-1%) during the week 24 – 20 Jul 2023, compared to the same week in 2022.
- Compared to 2019, the market shares of the different market segments for 1-30 July 2023 are quite similar except for Business Aviation (1.3 percentage point larger) and Regional (1.8 percentage point smaller).

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 top European aircraft operator is Ryanair – 3rd globally.
- The other European airline in the top 10 is easyJet (10th).
- Five more airlines remain in the top 25: Turkish Airlines (11th), Lufthansa (14th), Air France (15th), Wizz Air (18th), KLM (19th).
- British Airways makes the top 25 this year while Vueling is not anymore in the top 25 this year (though they were in 2022).

Top 10 airports

Airport ranking

Week 24-30 Jul 2023 (vs 2019)

No.	Airport	Avg. daily dep/arr flights	vs 2022	vs 2019
1.	iGA Istanbul	1,472	+10%	+16%
2.	Amsterdam	1,390	+15%	-2%
3.	Paris Charles de Gaulle	1,343	+5%	-11%
4.	London Heathrow	1,325	+21%	-0%
5.	Frankfurt	1,293	+23%	-15%
6.	Madrid Barajas	1,107	+6%	-11%
7.	Antalya	1,036	+9%	+9%
8.	Barcelona	990	+9%	-6%
9.	Palma de Mallorca	965	+1%	+3%
10.	Munich	893	+10%	-25%

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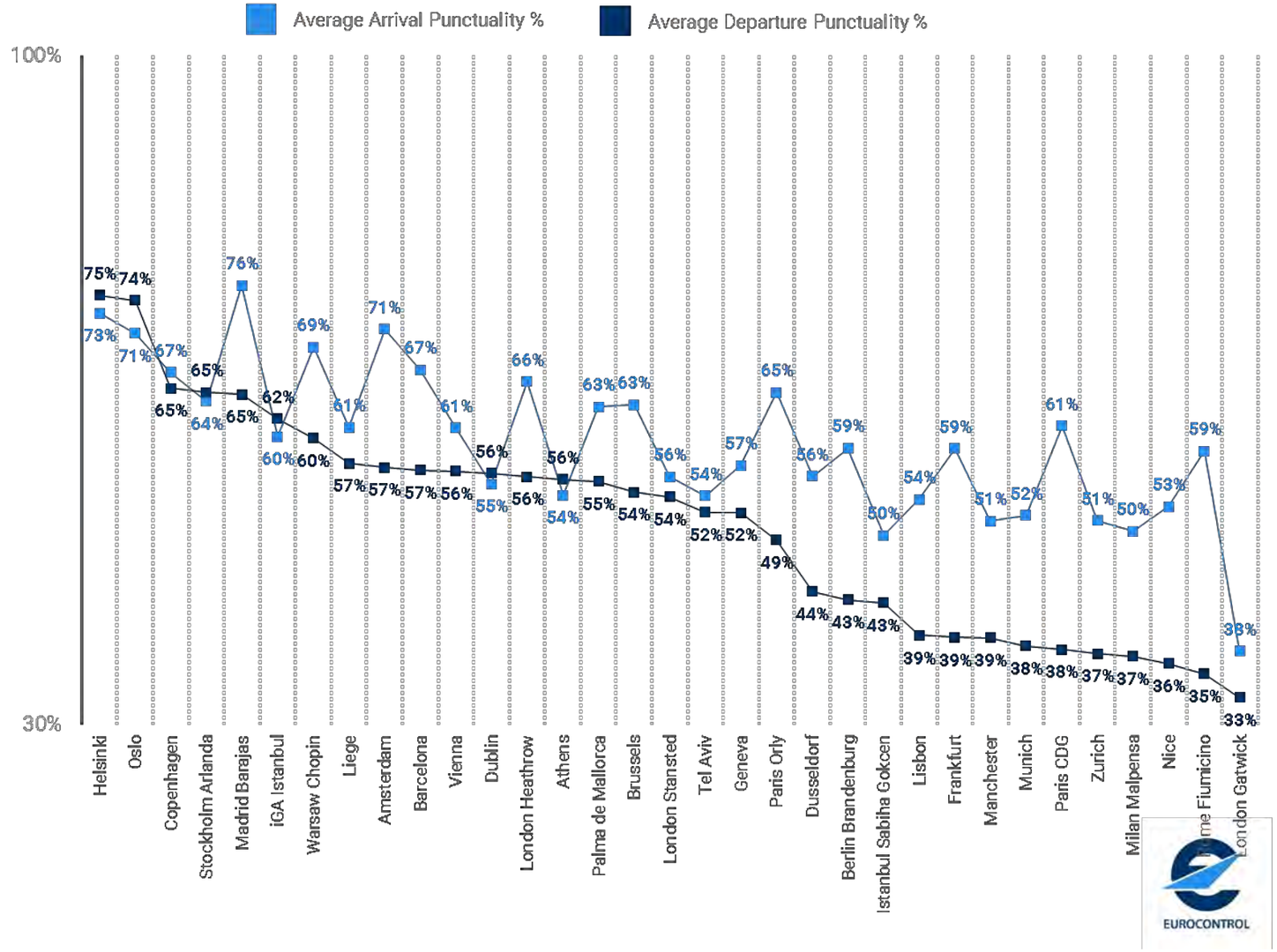
- No change in the ranking compared to the previous edition.
- All airports experienced sustained growth vs 2022, ranging from +1% (Palma de Mallorca) to +23% (Frankfurt).
- Three top 10 airports – iGA Istanbul, Antalya and Palma de Mallorca – are currently handling traffic above their 2019 levels.

Average arr/dep punctuality at main airports

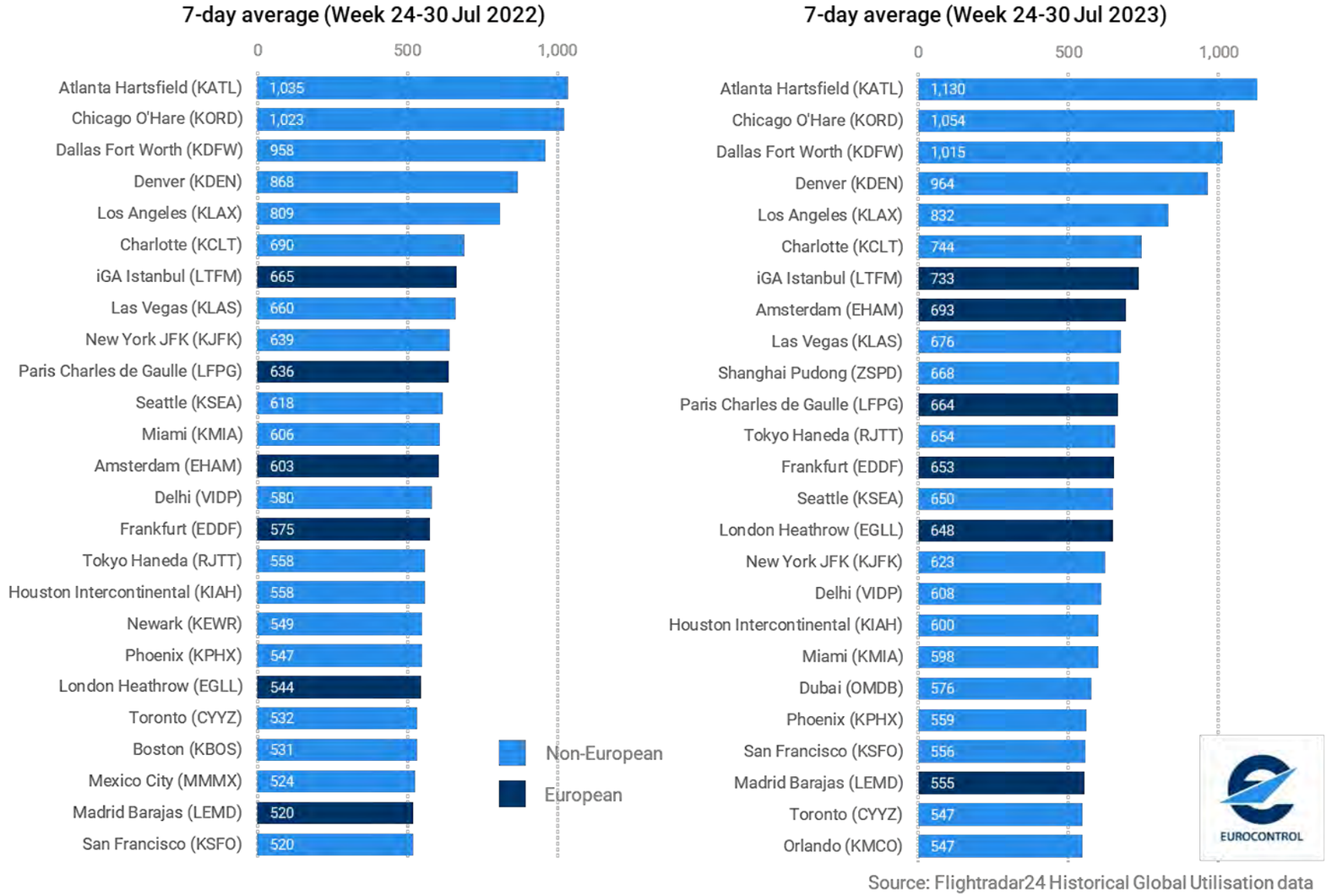
(Week 24-30 Jul 2023)



- 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, Stockholm, iGA Istanbul, Dublin and Athens, 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)



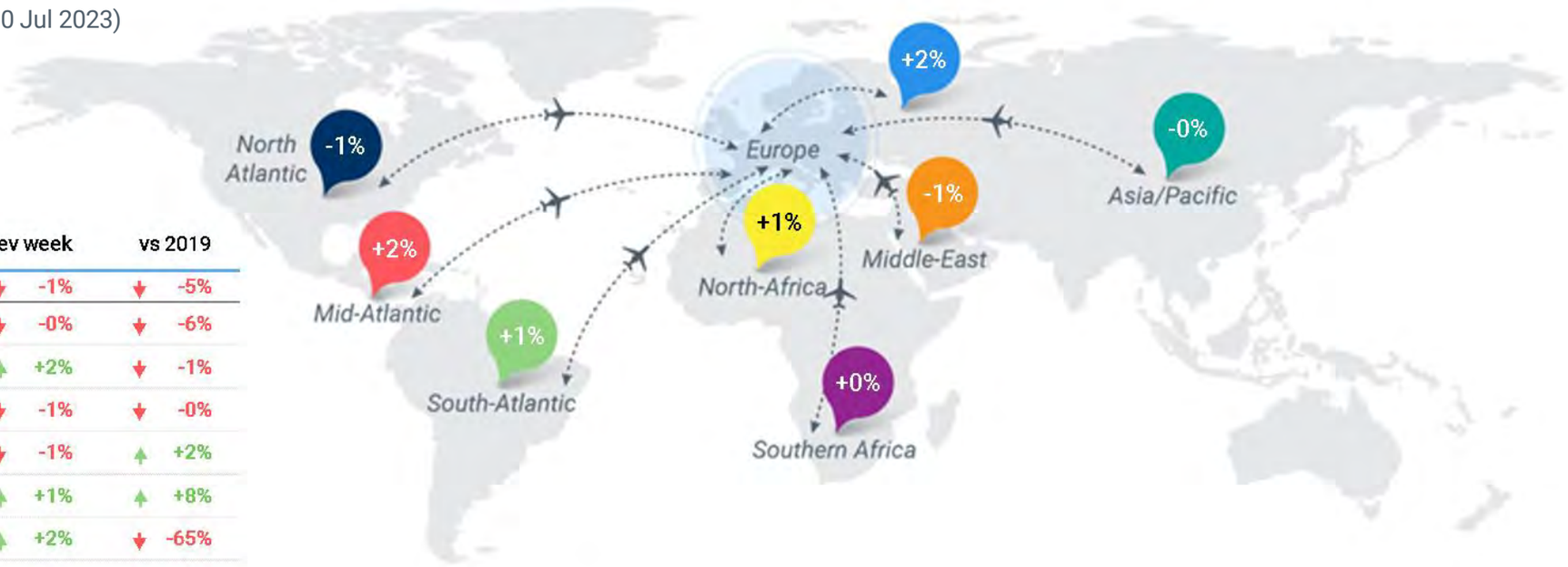
Source: Flightradar24 Historical Global Utilisation data

Over the last week

- Six European airports are ranked in the top 25 of global airport departures (the same number as in 2022).
- The highest ranked European airport (7th) is iGA Istanbul Airport, same place as in 2022.
- The other European airports in the top 25 are Amsterdam (8th), Paris CDG (11th), London Heathrow (13th), Frankfurt (15th) and Madrid (23rd).
- The only Chinese airport to make the 2023 list is Shanghai (10th), with none appearing in the top 25 a year ago.

Traffic flows

(average daily departure/arrival flights for week 24-30 Jul 2023)



Region	Average daily flights	vs prev week	vs 2019
Intra-Europe	25,567	-1%	-5%
Europe ↔ Asia/Pacific	780	-0%	-6%
Europe ↔ Mid-Atlantic	171	+2%	-1%
Europe ↔ Middle-East	1,713	-1%	-0%
Europe ↔ North Atlantic	1,481	-1%	+2%
Europe ↔ North-Africa	1,305	+1%	+8%
Europe ↔ Other Europe	454	+2%	-65%
Europe ↔ South-Atlantic	179	+1%	-11%
Europe ↔ Southern Africa	296	+0%	-6%
Non Intra-Europe	6,378	-0%	-12%

- The main traffic flow was intra-European with 25,567 daily flights last week, 1% fewer than the previous week. Intercontinental flows recorded 6,378 daily flights on average last week, in line with the previous week.
- The second-largest regional flow is between Europe and the Middle East: 1,713 average daily flights last week represented a decrease of 1% vs the previous week (fewer flights with Saudi Arabia, UAE, Jordan, and Bahrain).
- The third flow is to/from North America with 1,481 daily flights, slightly decreased (-1%) vs the previous week's value.
- The fourth flow is to/from North Africa with 1,305 flights per day, slightly increased (+1%) vs the previous week's value.
- Flows with Other Europe (including the Russian Federation) remain massively reduced at -65% compared to 2019.
- Flows between Europe and Asia/Pacific are still lagging behind but to an increasingly lesser extent, now only -6% compared to 2019. European flows with China (incl. Hong Kong) were at 214 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 24-30 Jul 2023

No.	Country pair	Average daily flights	% prev week	% prev year	% 2019
1.	UK ↔ US	331	-2%	+17%	+1%
2.	Germany ↔ US	175	-3%	+14%	-1%
3.	France ↔ US	144	+2%	+17%	+4%
4.	Italy ↔ US	99	-1%	+20%	+15%
5.	Netherlands ↔ US	78	-1%	-1%	-10%
6.	Spain ↔ US	76	+1%	+6%	-6%
7.	Ireland ↔ US	74	+1%	+7%	-0%
8.	UAE ↔ UK	59	+0%	+20%	-11%
9.	Canada ↔ UK	48	-2%	-8%	-14%
10.	Canada ↔ France	45	-1%	+14%	+6%

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- Since the last edition, there have been a few changes in the rankings for the top 10 long-haul country pairs: Spain ↔ US and Ireland ↔ US have swapped places.
- Four flows posted an increase vs the previous week (France ↔ US, Spain ↔ US, Ireland ↔ US and UAE ↔ UK).
- 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.
- Four flows are currently above 2019 levels (UK ↔ US, France ↔ US, Italy ↔ US and Canada ↔ France).

Economics

Week 24-30 Jul 2023

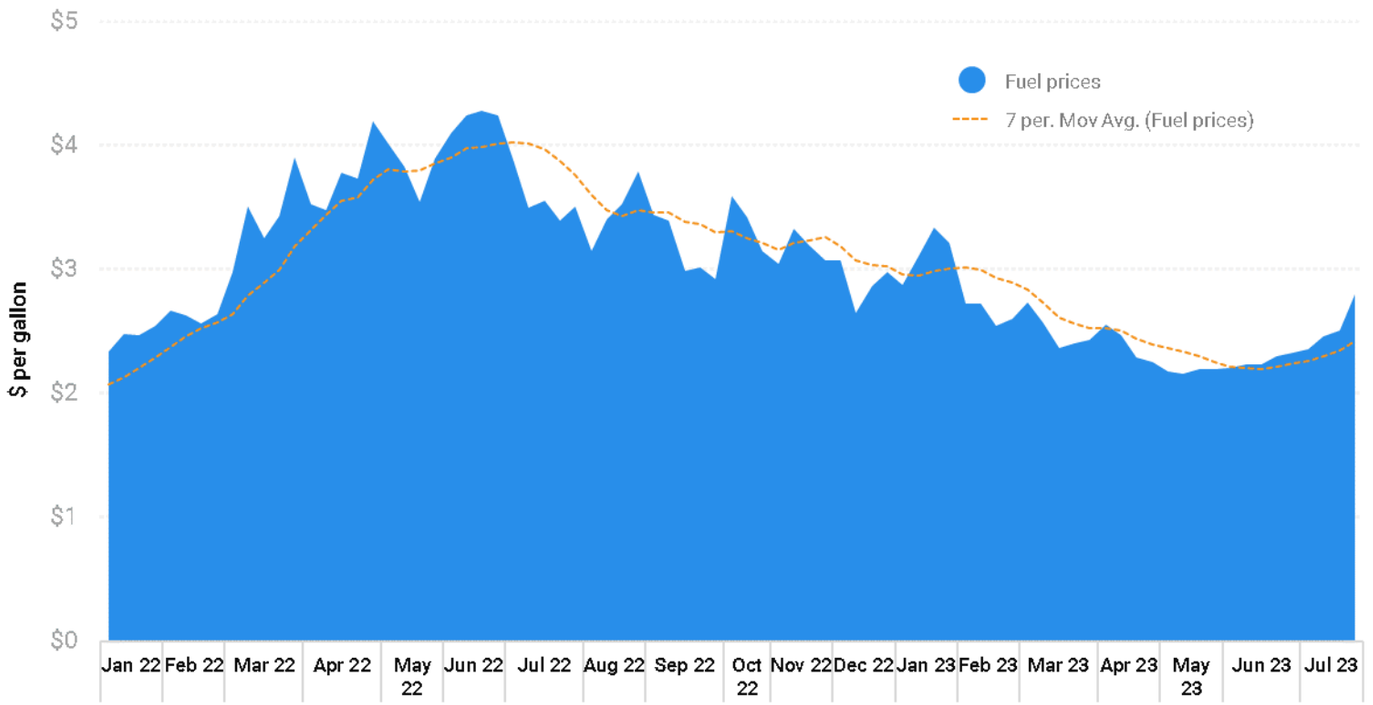
28 Jul 2023
avg fuel price:

$2.80 /gallon

14%
vs. $2.46 /gallon
on 14 Jul 2023

Source: IATA/Platts

Jet fuel price (Europe)

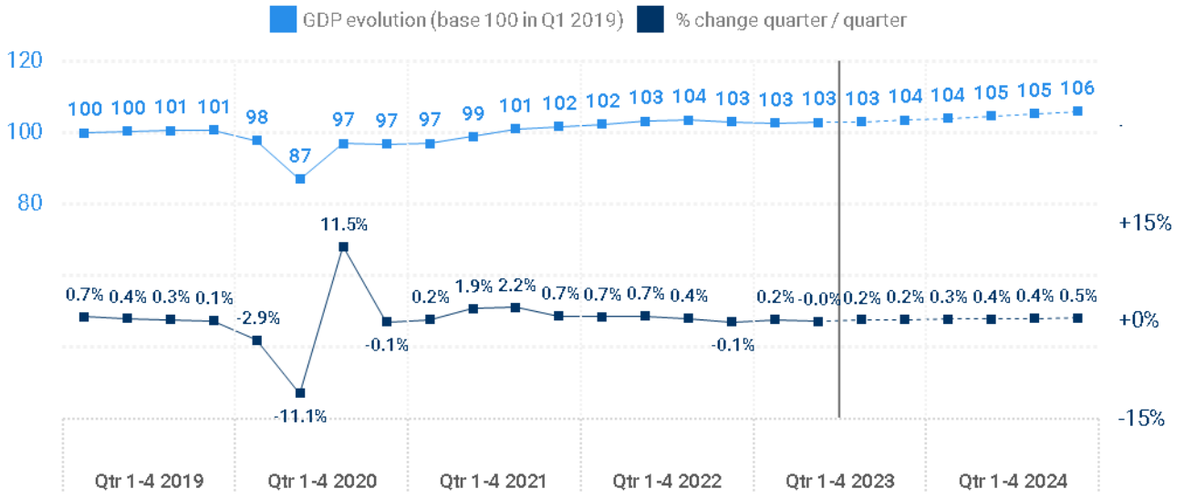


Source: IATA/Platts

- The average price of jet fuel increased to 2.80 USD/gallon on 28 July, an increase of 14% compared to the last Overview, they however are 3% lower than the price on 6 January 2023.
- Based on a moving average trend, fuel prices in Europe have been mainly declining since June 2022, from $4/gallon down to $2.20/gallon in early June 2023.
- Since then, jet fuel prices are on the rise again after some OPEC+ States as well as Saudi Arabia decided to cut oil production.

GDP in the European Union

Constant prices and exchange rate, Euro

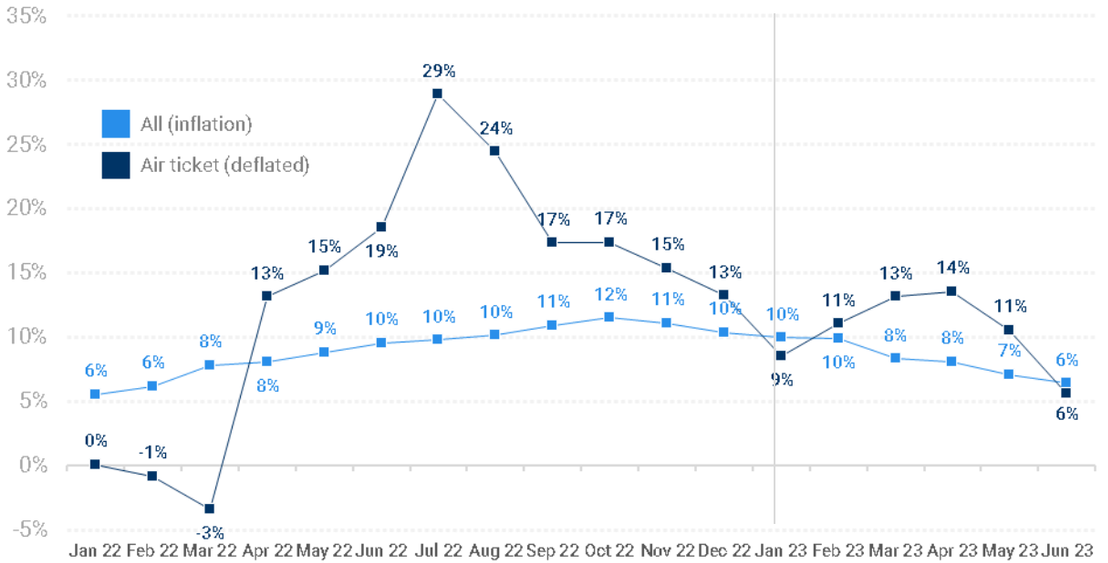


Source: Oxford Economics Ltd.

- According to the latest GDP forecast from Oxford Economics, EU27 economies have posted a positive growth during Q1 2023 (+0.2% vs Q1 2022, revised up from 0.1% in the previous forecast), but stagnated during Q2 2023. The EU27 quarterly rate should climb up to +0.5% in Q4 2024 (vs Q4 2023).
- 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



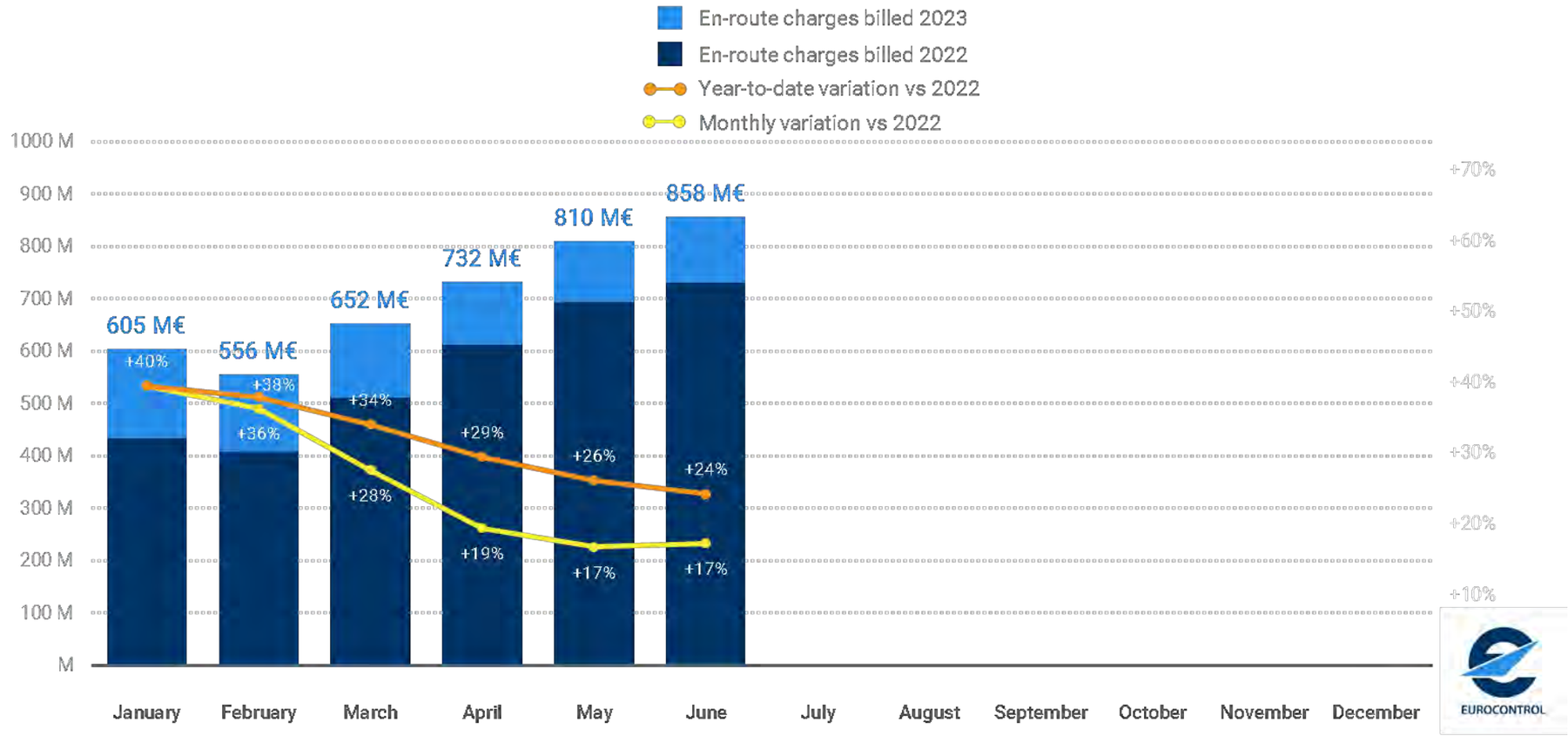
Source: EUROSTAT

The latest information from EUROSTAT show the following:

- In June 2023, all-prices inflation stood at 6%; ticket prices increased by 6% above inflation.
- This is the weakest increase of air ticket prices since March 2022.
- This reflects potentially the largest low-cost flight offer during summer season, together with the relative easing of jet fuel prices (compared to mid-2022).

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

Year-to-date amount billed: 4,214 M€ (+24% vs 2022)



- At Network level, 858M€ were billed in June which represents +17% vs 2022 and +15% 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 June 2023 variation vs June 2022 (+17%) is explained by an increase in Unit Rates (+7%) and an increase in Service Units (+12%).
- 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 4,214M€, which is +24% vs 2022.

Supporting European Aviation

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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