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EUROPEAN AVIATION OVERVIEW

27 Nov - 03 Dec 2023

Wednesday 6 December 2023

Headlines

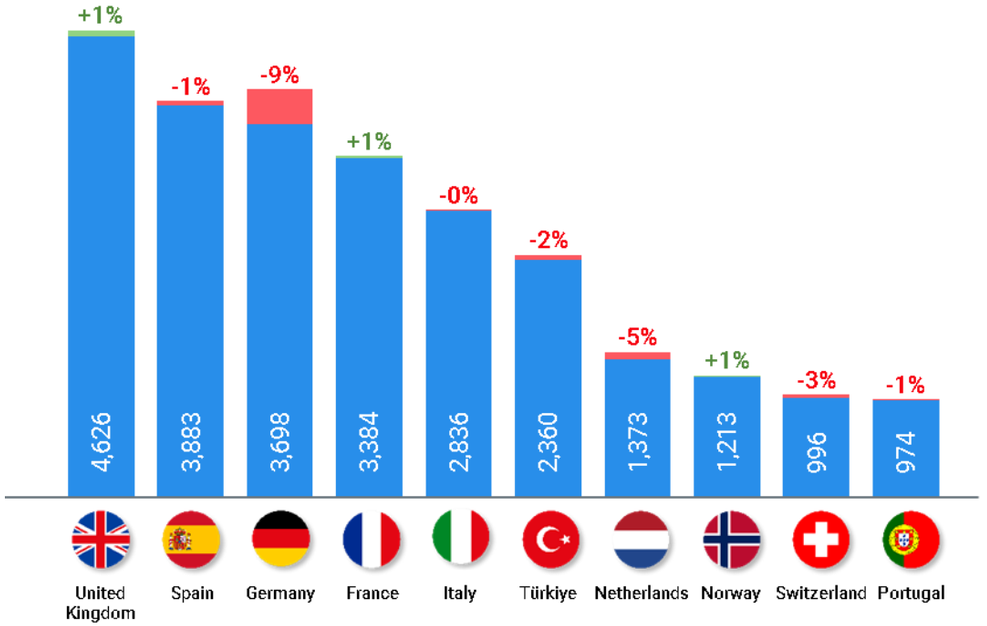
(Week 27 Nov - 03 Dec 2023)

- The Network recorded 23,809 average daily flights (+5% vs 2022). The average number of flights was 1.2% lower than in the previous week.
- In November, the number of flights in the network was at 92% of 2019 levels, below the low scenario of the monthly traffic forecast: airlines schedules published during the preparation of the forecast did not properly reflect the downwards changes associated with winter demand and there were more “non-operated” schedules than usual.
- On average, the top 10 carriers decreased their capacities by 2% compared to the previous week.
- En-route ATFM delays averaged just below 12,500 minutes per day (0.52 min/flight), with the main causes being capacity & staffing (61%). The week registered 46% less delay than the previous week.
- Arrival and departure punctuality dropped significantly at 67.3% and 62.5% respectively, being 17.3/17.8 percentage points below 2019 levels, mainly due to seasonal weather.
- The average jet fuel price stood at $2.68/gallon on 1 December 2023, a 4% decrease compared to two weeks ago.

Top 10 busiest States

On week 27 Nov - 03 Dec 2023

(all flights excl. overflights compared with previous week)



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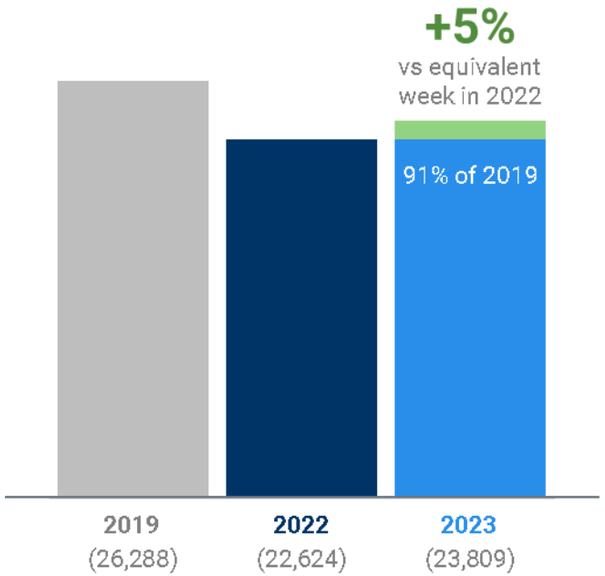
Traffic situation

Average daily flights (including overflights)

Week 27 Nov - 03 Dec 2023



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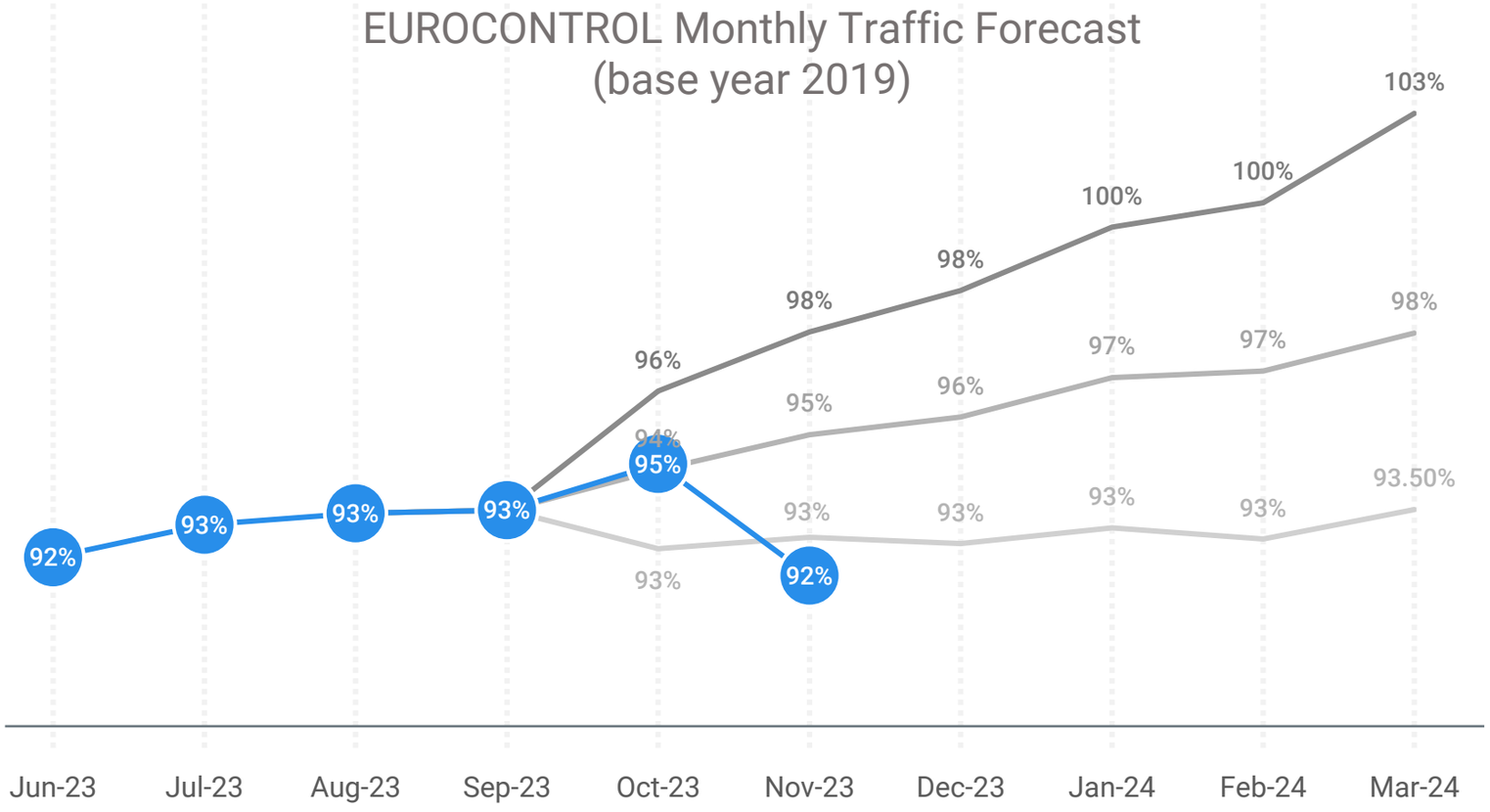
Overall situation compared to the EUROCONTROL Monthly Traffic Forecast

(base year 2019)



Publication date: October 2023

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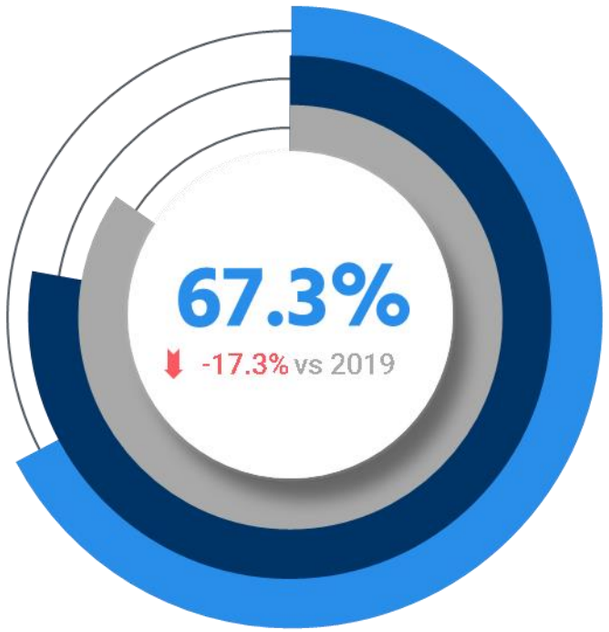
- For November 2023, flights closed at 92.0% of November 2019 levels, below the low scenario.
- The network recorded fewer flights than anticipated as airline schedules made available during the preparation of the forecast (September 2023) were too optimistic and did not properly reflect the change to winter schedules. Moreover, there were higher "non-operated" schedules last month, storm episodes in early November and cancellations from low-cost airlines, sensitive to the market conditions.
- On a year-to-date basis, Network traffic is at 91% of 2019, and +10% vs 2022

Arrival & departure punctuality

(all network scheduled flights)

Week 27 Nov - 03 Dec 2023

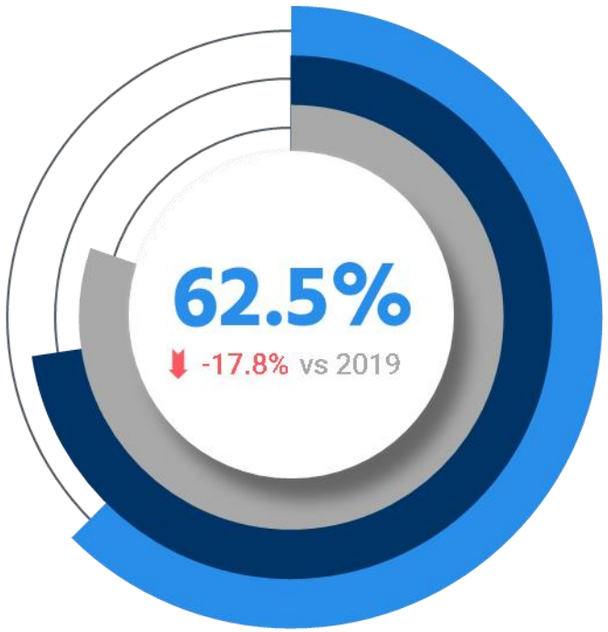
ARRIVAL PUNCTUALITY



84.7% _____ in 2019

77.8% _____ in 2022

DEPARTURE PUNCTUALITY



80.3% _____ in 2019

72.6% _____ in 2022

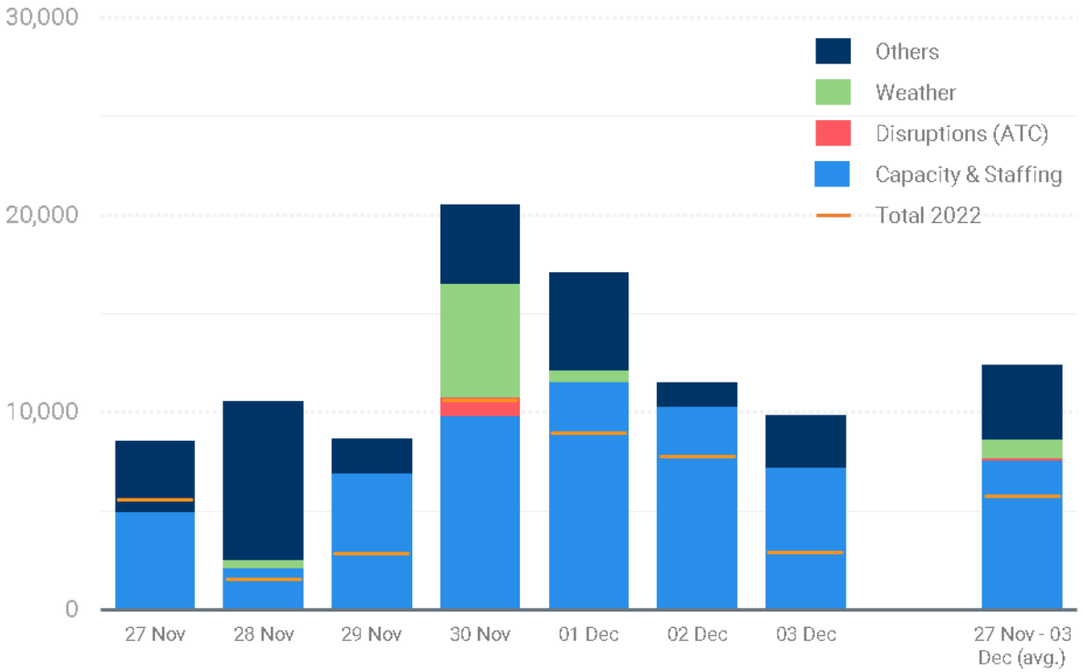
The pictures show the share of flights arriving/departing no later than 15 minutes after/before the scheduled time (OTP15).

- Network punctuality deteriorated when compared to the equivalent week in 2019. Arrival punctuality was down by 17.3 percentage points to 67.3% with departure punctuality falling by 17.8 percentage points to 62.5%.
- Winter weather (mainly snow and low visibility) caused delays and disruption in the network during the week of 27 November to 03 December, with the end of the week particularly affected.
- Munich experienced significant disruption when the airport was affected by large volumes of snow and freezing rain (starting in the afternoon of 30 November); the airport saw many cancelled flights and also diversions, with the impact continuing into the following week.
- Elsewhere in the network, Lisbon continued to suffer from aerodrome capacity delays, combined with weather. London Heathrow and Gatwick saw delays due to low visibility, notably on 01 & 02 December. Amsterdam Schiphol experienced delays due to low visibility and forecasted snow on 30 November and 01 December respectively. Thunderstorm activity affected both Istanbul airports. Frankfurt Main experienced aerodrome capacity delays due to a lack of parking as a result of diversions from Munich Airport (see previous item).

En-route ATFM delays

Delays per cause (EUROCONTROL Area)

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



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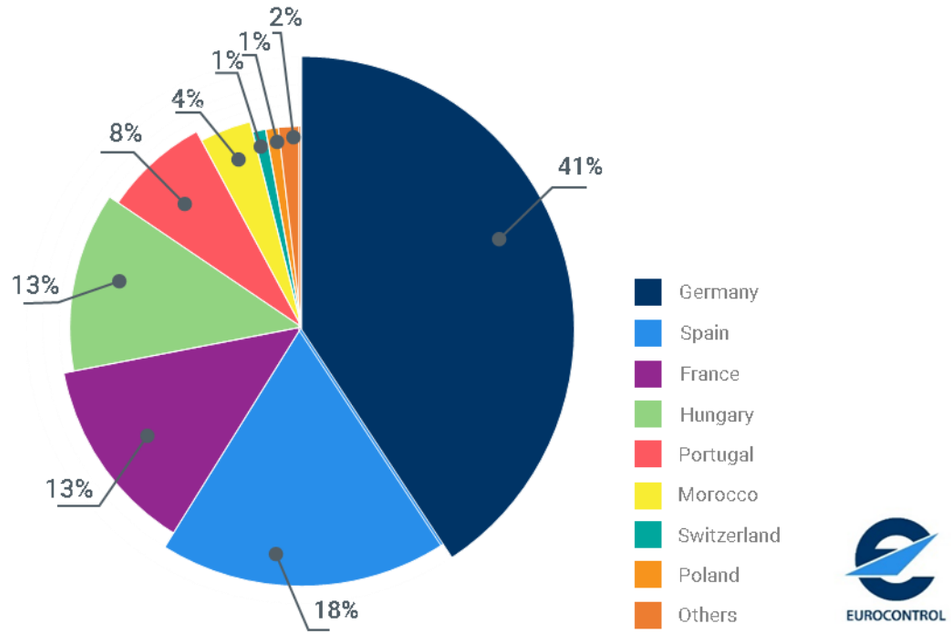
- At the end of the 27 November – 03 December week, en-route ATFM delays were above 2022 levels on all days. On a 7-day average (last bar on the right), the week registered delays 115% higher than in the comparable week in 2022.
- On average, they amounted to 12,420 minutes a day, with the main cause being capacity & staffing (61%). Weather disruption was significant on 30 November, notably due to convective activity and heavy rain in Canaries ACC.

Share of en-route ATFM delays

Week 27 Nov - 03 Dec 2023



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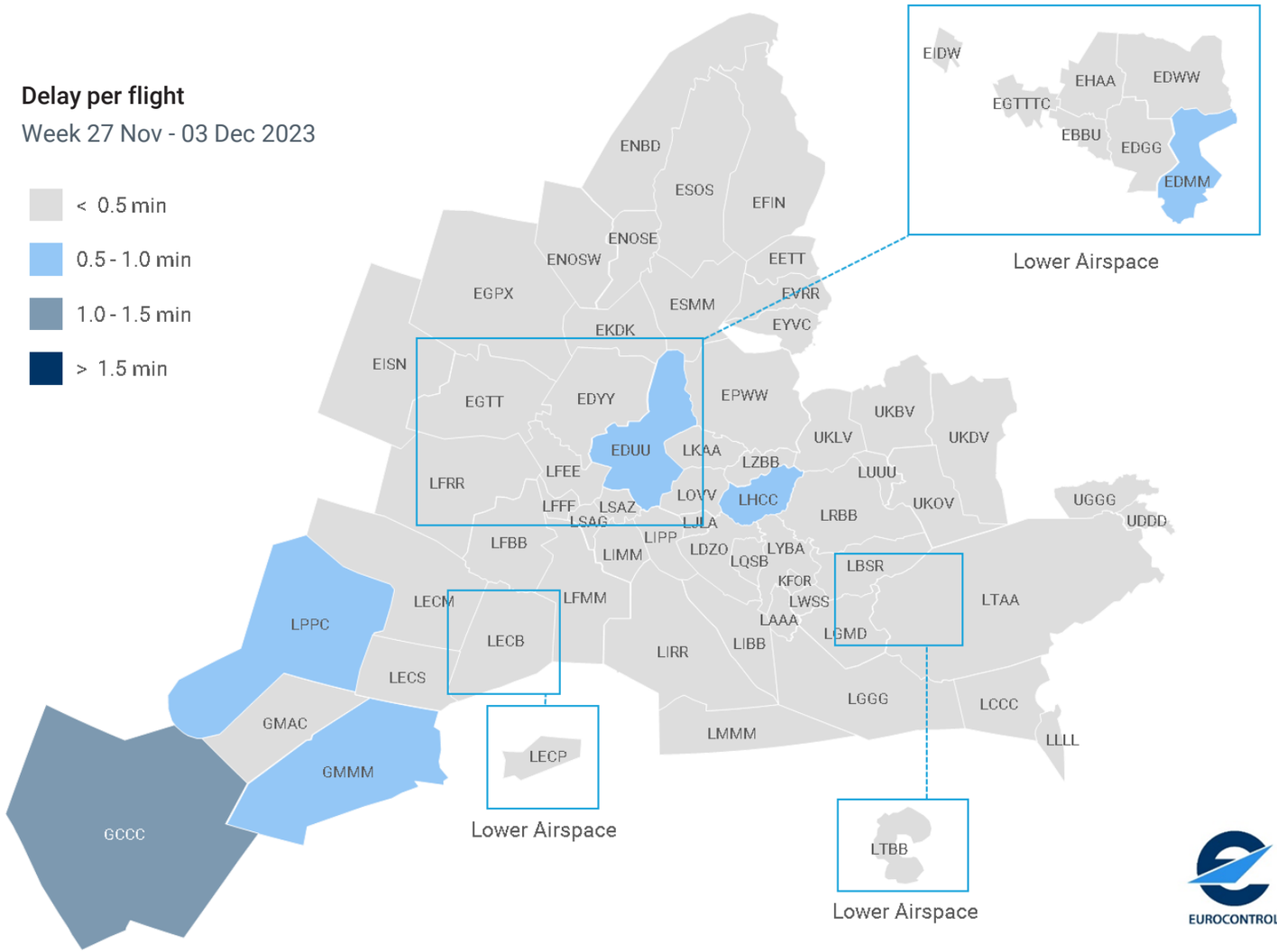
- Germany accounted for 41% of all en-route ATFM delays, owing to system implementation (Munich) but also capacity and staffing (mainly Karlsruhe).
- Spain came second with 18% of all en-route ATFM delays,
- France came third with 13% of all en-route ATFM delays.

En-route ATFM delayed flights per Area Control Centre



- Over the last week, en-route ATFM delays have decreased by 46% compared to the week before, but were above 2022 levels (12,420 minutes per day, on average).
- Compared to the same week in 2022, en-route ATFM delays were 115% higher.
- Last week, the most affected ACCs were:
  - Canaries (1.0 min/flight), mainly owing to weather issues,
  - Munich (0.8 min/fl), mainly due to system implementation (iCAS).
  - Karlsruhe (0.7 min/fl), mainly owing to recurring capacity and staffing issues,
  - Budapest (0.7 min/flight), mainly owing to limited capacity in some sectors (the closure of Ukraine airspace generates extra demand).
- Overall, Germany was responsible for 41% of all en-route ATFM delays last week, followed by Spain (18%) and France (13%).

Top 10 States

Departures and arrivals

Week 27 Nov - 03 Dec 2023

See more

No.	Country	Average daily flights	% prev week	% prev year	% 2019
1.	United Kingdom	4,626	+1%	+9%	-6%
2.	Spain	3,883	-1%	+8%	+6%
3.	Germany	3,698	-9%	-2%	-26%
4.	France	3,384	+1%	+5%	-7%
5.	Italy	2,836	-0%	+10%	-2%
6.	Türkiye	2,360	-2%	+11%	+8%
7.	Netherlands	1,373	-5%	+11%	-9%
8.	Norway	1,213	+1%	-3%	-13%
9.	Switzerland	996	-3%	+1%	-10%
10.	Portugal	974	-1%	+7%	+10%

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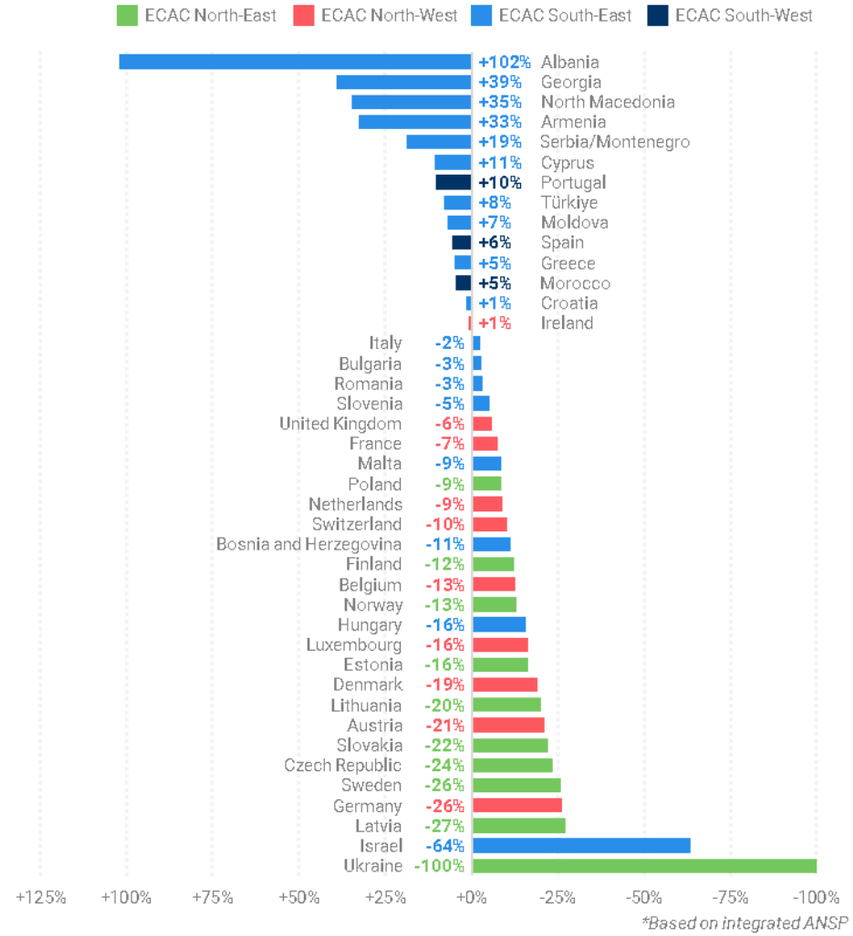
- The top 10 States, in aggregate, recorded fewer flights compared to the previous week (-1.7%).
- Compared to the previous edition: Germany and Spain swapped places.
- Seven States recorded fewer flights compared to the previous week. Germany posted the highest decrease (-9%) as the State was affected by airport closure (heavy snowfalls across Southern Germany from 30 November). The Netherlands recorded a 5% decrease owing to decreases on flows from/to UK, Germany and Spain.
- Three States within the top 10 are recording traffic above 2019 (Spain, Türkiye, and Portugal). The seven remaining States are still between 26% and 2% below pre-COVID levels.
- The number of flights to/from Israel recorded 64% fewer flights compared to the same week in 2022.

States in the EUROCONTROL Network

Compared to the equivalent week in 2019

Dep/Arr flights for week 27 Nov - 03 Dec 2023



*Based on integrated ANSP

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Top 10 aircraft operators

Week 27 Nov - 03 Dec 2023 (avg daily flights)

See more

No.	Aircraft operator	Average daily flights	% prev week	% prev year	% 2019
1.	Ryanair Group	2,183	+1%	-0%	+11%
2.	Turkish Airlines	1,293	+0%	+11%	+6%
3.	easyJet Group	1,163	+7%	+27%	-7%
4.	Lufthansa Airlines	927	-21%	-17%	-35%
5.	Air France Group	864	+1%	-6%	-20%
6.	Wizz Air Group	788	-0%	+26%	+46%
7.	British Airways Group	774	-2%	+8%	-7%
8.	KLM Group	708	-9%	+19%	-5%
9.	SAS Group	570	-3%	-0%	-30%
10.	Vueling	538	+4%	+15%	+13%

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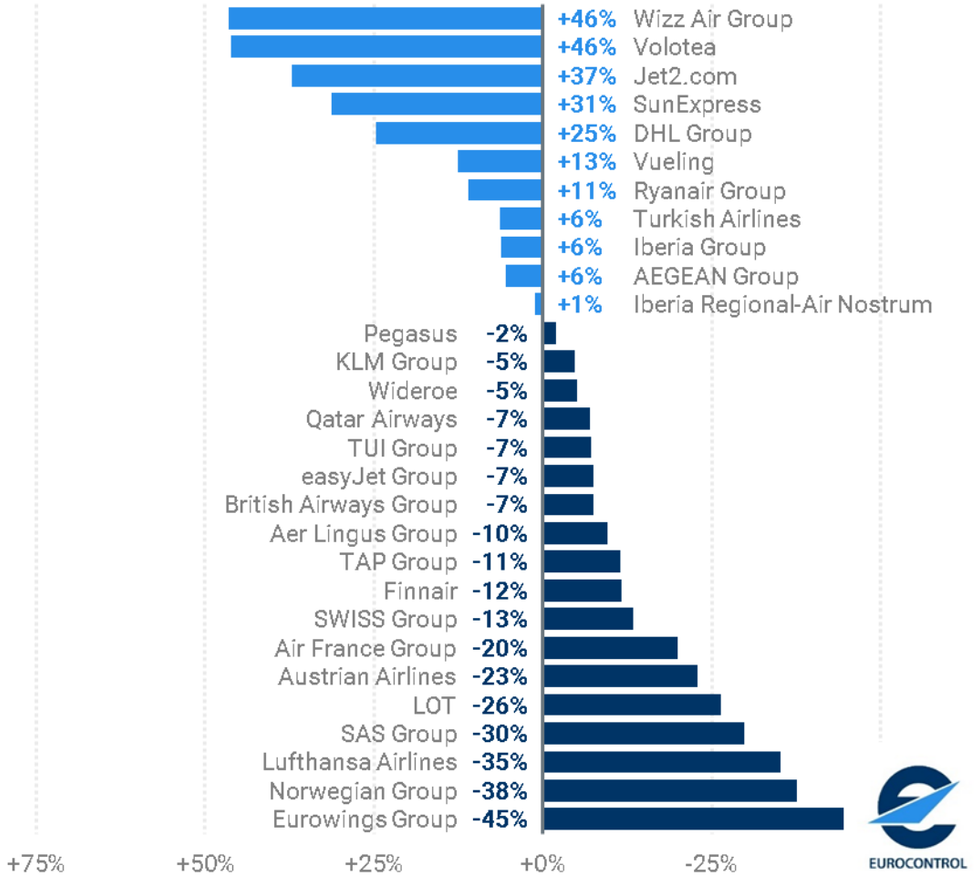
- The top 10 aircraft operators posted a decrease in the number of flights (-2.1% on average) compared to the previous week.
- Biggest decreases were recorded for Lufthansa (-21%), mainly on domestic flows in Germany (weather disruption in the South of Germany) and for KLM (-9%), mainly on flows Netherlands ↔ UK and Netherlands ↔ Spain.
- Highest increases were recorded for easyJet (+7%) on France ↔ Portugal, France ↔ Italy or France ↔ UK and Vueling (+4%), mainly thanks to increases on domestic flows in Spain.
- Last week, four airlines within the top 10 had flight numbers above 2019 levels: +46% (Wizz Air Group), +13% (Vueling), +11% (Ryanair group) and +6% (Turkish Airlines)..

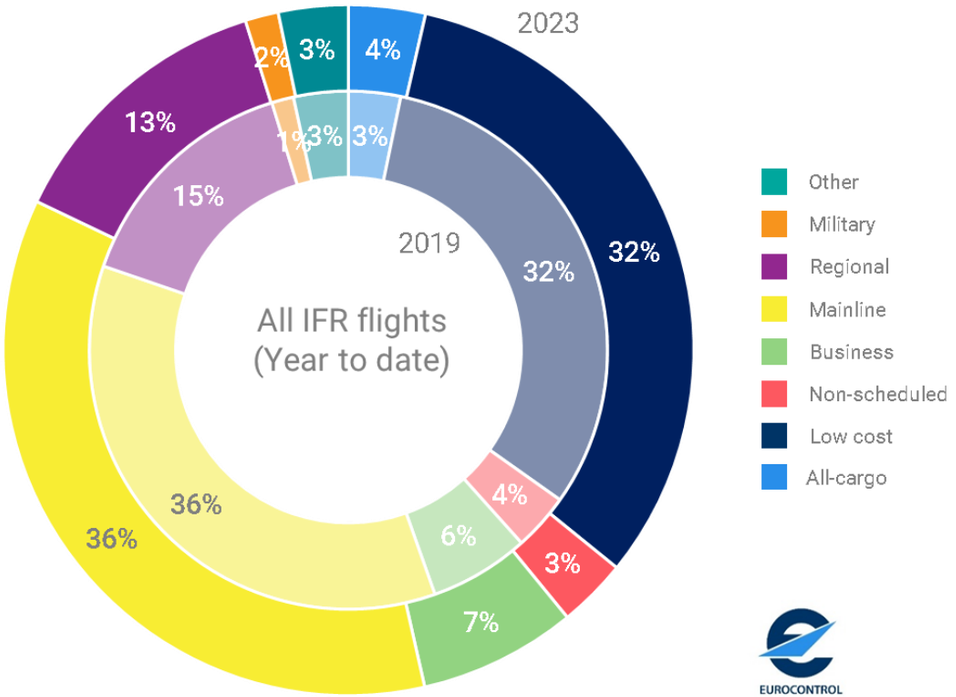
Aircraft operators in the EUROCONTROL Network

Compared to the equivalent week in 2019
Dep/Arr flights for week 27 Nov - 03 Dec 2023



Market segments in the EUROCONTROL Network

Average share of total flights (year to date)

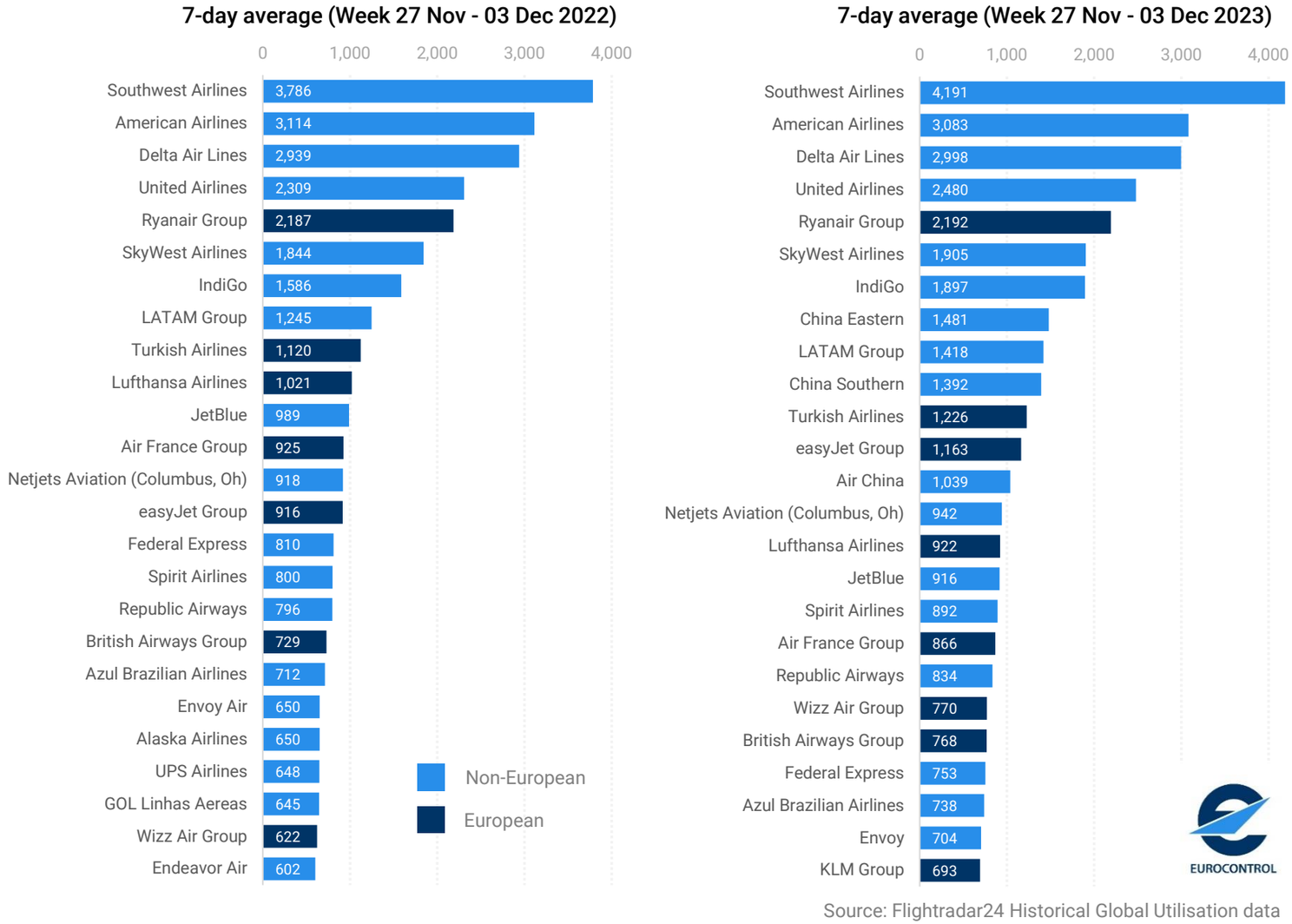


No.	Market segment	Avg. flights	% prev week	% prev year	% 2019
1.	Mainline	8,906	-2%	+8%	-11%
2.	Low Cost	7,176	+1%	+11%	-0%
3.	Regional	3,400	-3%	-1%	-23%
4.	Business	1,660	+2%	-2%	+22%
5.	All-cargo	1,073	+3%	-5%	+10%
6.	Other	698	-10%	-4%	-24%
7.	Non-Scheduled	451	-2%	-7%	-17%
8.	Military	448	-3%	+8%	+21%

- The 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 (+8%) and Low-cost (+11%).
- On the other hand, Regional, Business Aviation and All-Cargo (-1%, -2% and -5% respectively) are now recording fewer flights in 2023 compared to 2022 levels. Over the week 27 November -- 03 December 2023, the Non-Scheduled segment recorded a 7% decline, mainly owing to some decreases on domestic flows in Israel as well as on flows Russian Federation ↔ Egypt or Russian Federation ↔ Türkiye.

Top 25 global aircraft operators

(average daily departure flights)

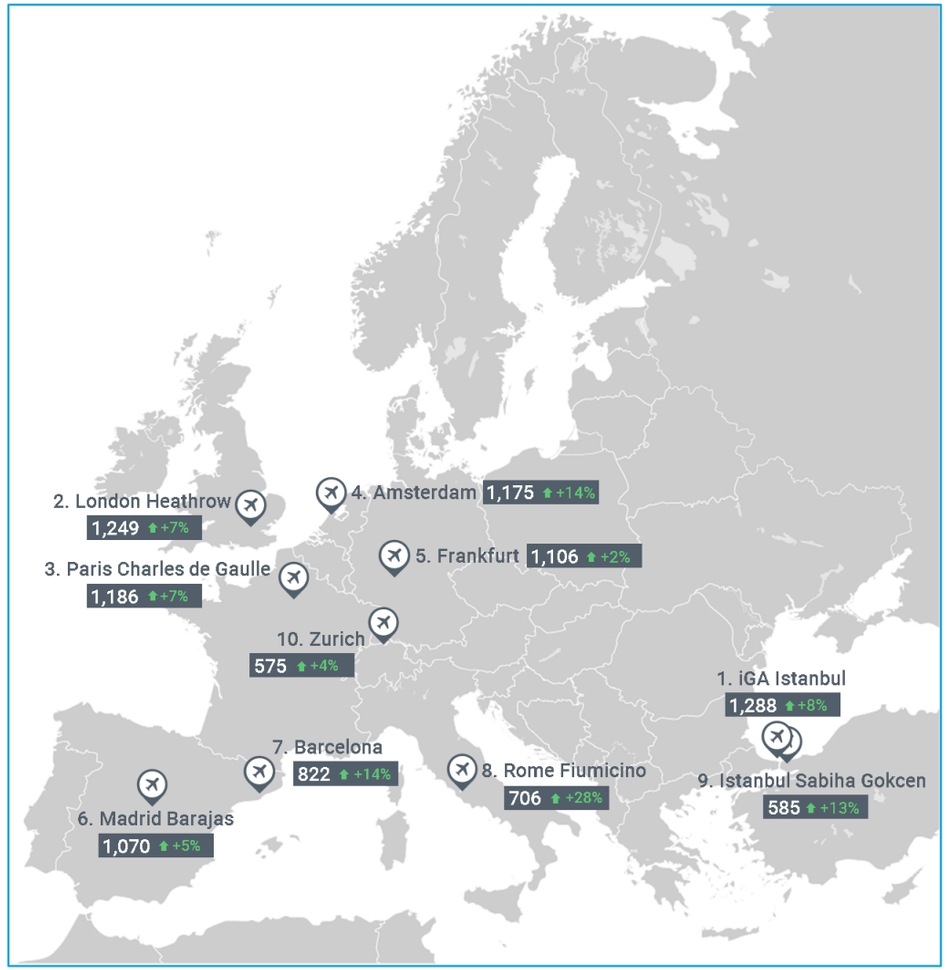


Source: Flightradar24 Historical Global Utilisation data

Over the last week:

- Eight European airlines are ranked in the top 25 global aircraft operators (one more than in 2022 as KLM group was not part of the top 25 global aircraft operators).
- The first European aircraft operator is Ryanair (ranked 5th) – the same rank as a year ago.
- Seven more airlines make the top 25: Turkish Airlines (11th), easyJet (12th), Lufthansa (15th) Air France (18th), Wizz Air (20th), British Airways (21st) and KLM (25th).

Top 10 airports



Airport ranking

Week 27 Nov - 03 Dec 2023

See more

No.	Airport	Avg. daily dep/arr flights	% prev week	% 2022	% 2019
1.	iGA Istanbul	1,288	-1%	+8%	+16%
2.	London Heathrow	1,249	-1%	+7%	+0%
3.	Paris Charles de Gaulle	1,186	+2%	+7%	-6%
4.	Amsterdam	1,175	-5%	+14%	-8%
5.	Frankfurt	1,106	-5%	+2%	-15%
6.	Madrid Barajas	1,070	+1%	+5%	-5%
7.	Barcelona	822	-1%	+14%	+2%
8.	Rome Fiumicino	706	-1%	+28%	-2%
9.	Istanbul Sabiha Gokcen	585	+1%	+13%	-1%
10.	Zurich	575	-2%	+4%	-11%

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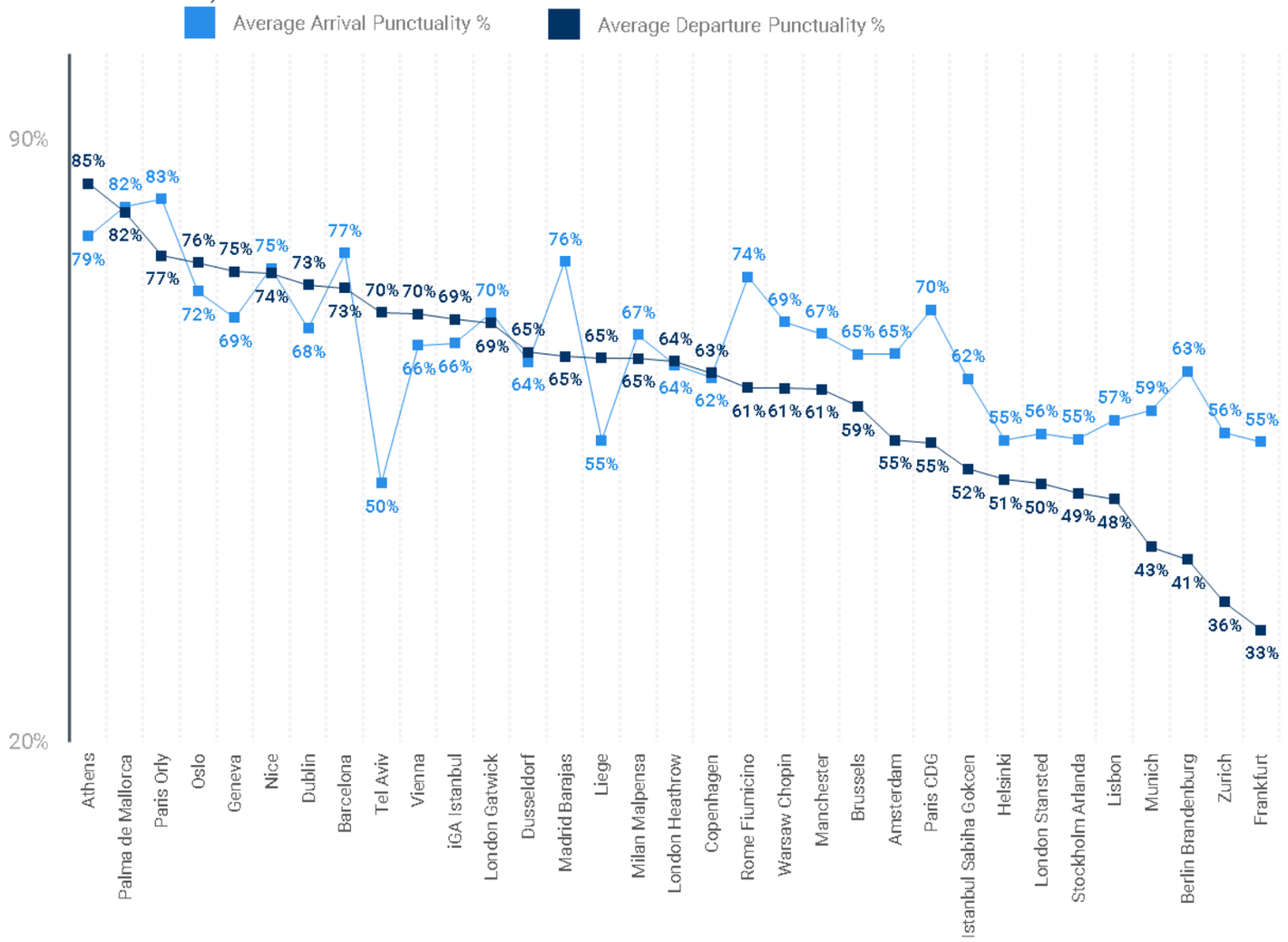
- Main changes in the ranking compared to the previous edition: Paris CDG and Amsterdam swapped places. Munich has dropped out of the top 10 (closure for a few days), Istanbul Sabiha Gokcen entered it.
- Only three airports recorded growth vs the previous week: Paris CDG, Madrid and Istanbul Sabiha Gokcen.
- All airports experienced growth vs 2022, ranging from +2% (Frankfurt) to +28% (Rome).
- Only three of the top 10 airports (iGA Istanbul, Barcelona and London Heathrow) are currently handling traffic above their 2019 levels.

Average arr/dep punctuality at main airports

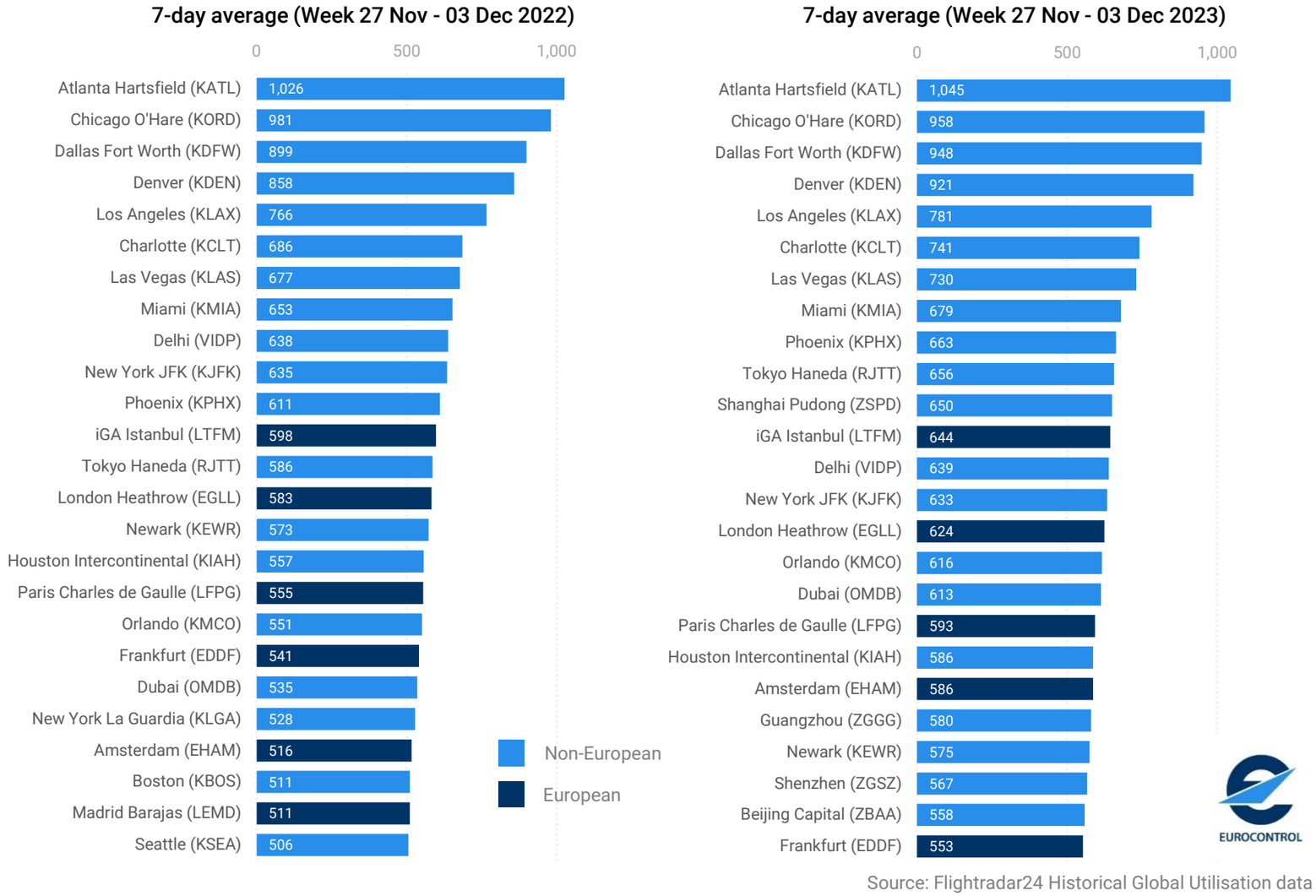
(Week 27 Nov - 03 Dec 2023)



- 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 November, arrival and punctuality figures deteriorated again compared to 2019.
- Since the beginning of the year:
  - Arrival punctuality is 69.6% in 2023, 9.5 percentage points below the same period in 2019,
  - Departure punctuality is 64.0% in 2023, 10.9 percentage points below 2019 figure.
- Arrival punctuality is generally higher (i.e. better) than departure punctuality at most airports.
- However, a few airports (Athens, Oslo, Geneva, Dublin, Tel Aviv, Vienna, iGA Istanbul, Dusseldorf, Liège, London Heathrow and Copenhagen) 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

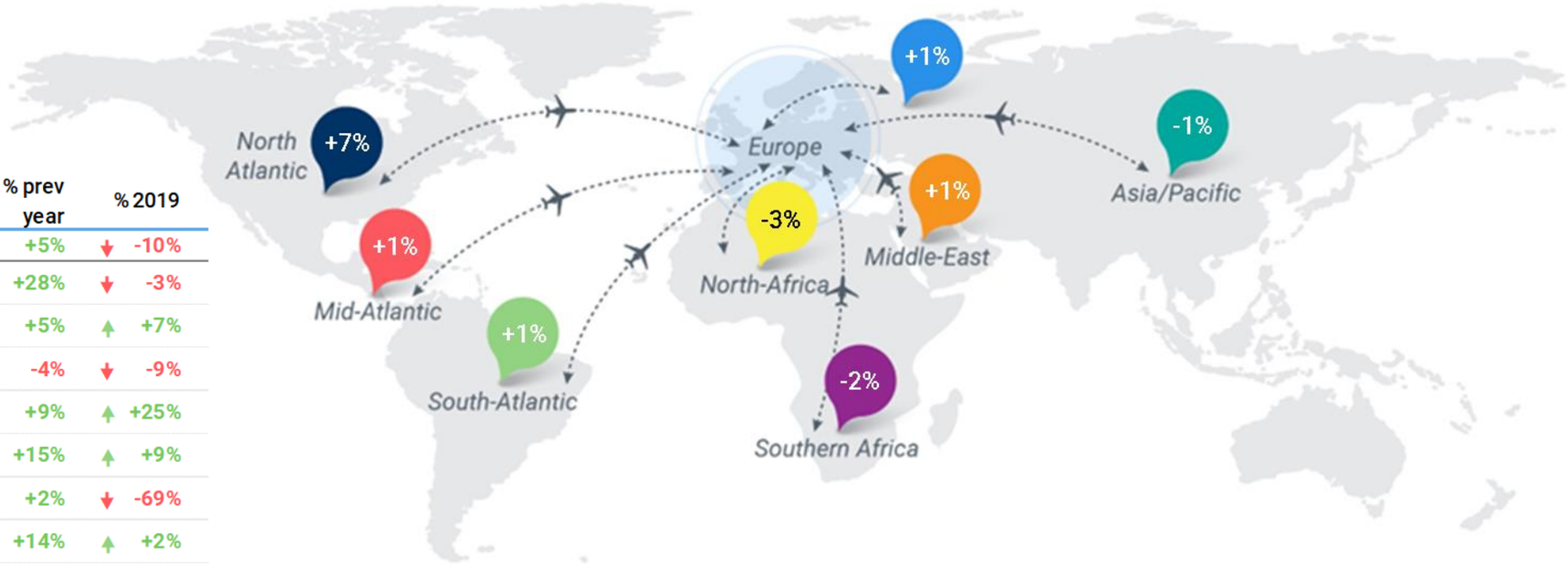
Over the last week:

- Five European airports are ranked in the top 25 of global airport departures (in 2022 there were six, including Madrid).
- The highest ranked European airport (12th) is iGA Istanbul Airport, the same as in 2022.
- The other European airports in the top 25 are London Heathrow (15th), Paris CDG (18th), Amsterdam (20th) and Frankfurt (25th).

Traffic flows

(average daily departure/arrival flights for week 27 Nov - 03 Dec 2023)

Region	Average daily flights	% prev week	% prev year	% 2019
Intra-Europe	**18,125**	-2%	+5%	-10%
Europe ↔ Asia/Pacific	771	-1%	+28%	-3%
Europe ↔ Mid-Atlantic	184	+1%	+5%	+7%
Europe ↔ Middle-East	1,185	+1%	-4%	-9%
Europe ↔ North Atlantic	1,099	+7%	+9%	+25%
Europe ↔ North-Africa	996	-3%	+15%	+9%
Europe ↔ Other Europe	239	+1%	+2%	-69%
Europe ↔ South-Atlantic	184	+1%	+14%	+2%
Europe ↔ Southern Africa	319	-2%	+6%	-3%
Non Intra-Europe	**4,977**	+1%	+9%	-7%



- The main traffic flow was intra-European with 18,125 daily flights last week, fewer (-2%) than the previous week. Intercontinental flows resulted in 4,977 daily flights on average last week, +1% vs the previous week.
- The second-largest regional flow is between Europe and Middle-East: 1,185 average daily flights last week, slightly higher vs the previous week.
- The third flow is to/from North-Atlantic, with 1,099 daily flights, recording similar levels compared to the previous week.
- The fourth flow is to/from North-Africa, with 996 flights per day, decreased (-3%) vs the previous week's value, owing to declines on flows to/from Morocco (-2%), Tunisia (-4%) and Egypt (-6%).
- 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 -3% compared to 2019. European flows with China (including Hong Kong) were at 236 daily flights last week (no change compared to the last edition).

Top 10 long-haul country pairs

(average daily departure/arrival flights for the last week)

Week 27 Nov - 03 Dec 2023

No.	Country pair	Average daily flights	% prev week	% prev year	% 2019
1.	UK ↔ US	293	+13%	+7%	+26%
2.	Germany ↔ US	138	-1%	-1%	+15%
3.	France ↔ US	106	+2%	+2%	+22%
4.	Netherlands ↔ US	70	+1%	+12%	+23%
5.	UAE ↔ UK	68	+5%	+27%	+1%
6.	Spain ↔ US	55	+5%	+17%	+22%
7.	Ireland ↔ US	52	+12%	+7%	+19%
8.	Italy ↔ US	47	+5%	+25%	+17%
9.	Russia ↔ UAE	40	+3%	+11%	+758%
10.	Germany ↔ UAE	40	-7%	+11%	-5%

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- Seven of the top 10 long-haul country pairs are with the United States, the main three being between the US and the UK, Germany and France. The three remaining flows within the top 10 are pairs between Europe and the United Arab Emirates.
- Eight flows posted an increase vs the previous week (ranging from +1% to +13%). The two flows posting a decrease were affected by the closure of Munich airport (heavy snow).
- All but one flow (Germany ↔ US) posted an increase on the same week in 2022.
- All but one flow (Germany ↔ UAE) are currently at or above 2019 levels.

Economics

Week 27 Nov - 03 Dec 2023

01 Dec 2023
avg fuel price:

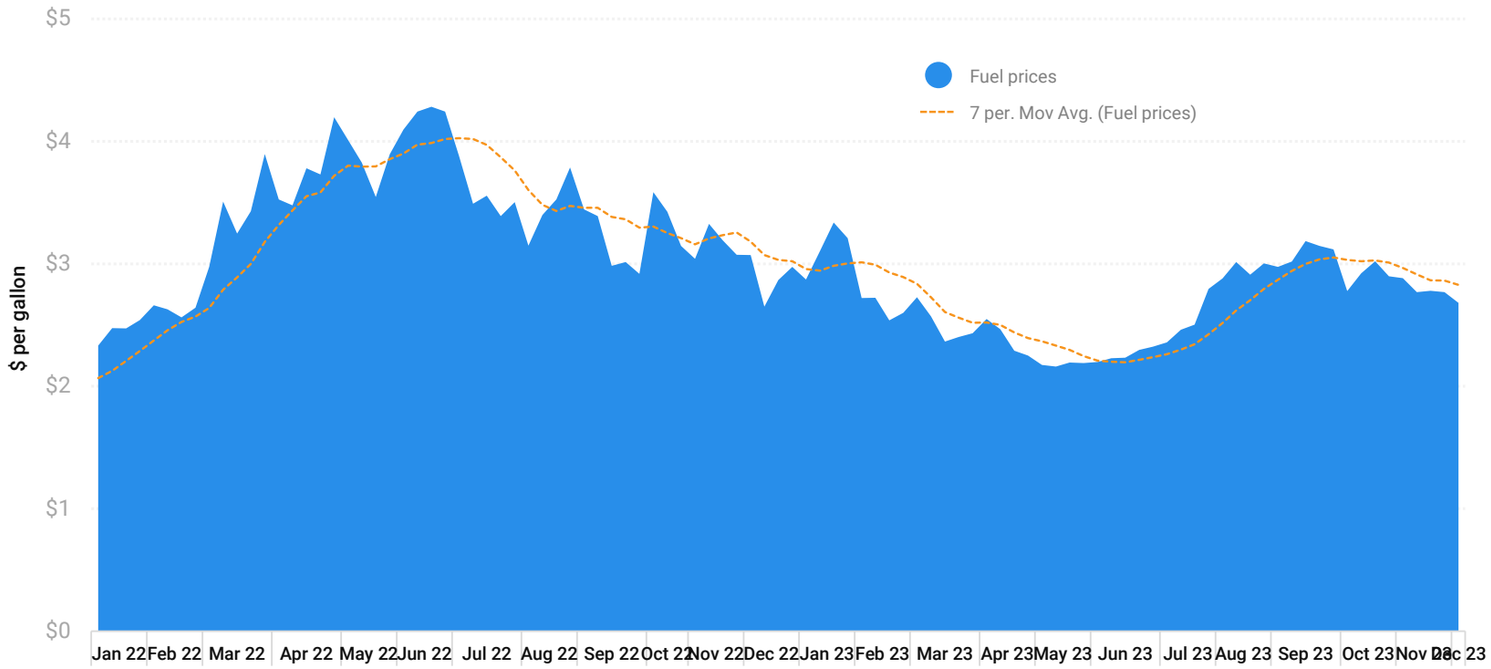
$2.68 /gallon

-4%

vs. $2.78 /gallon
on 17 Nov 2023

Source: IATA/Platts

Jet fuel price (Europe)

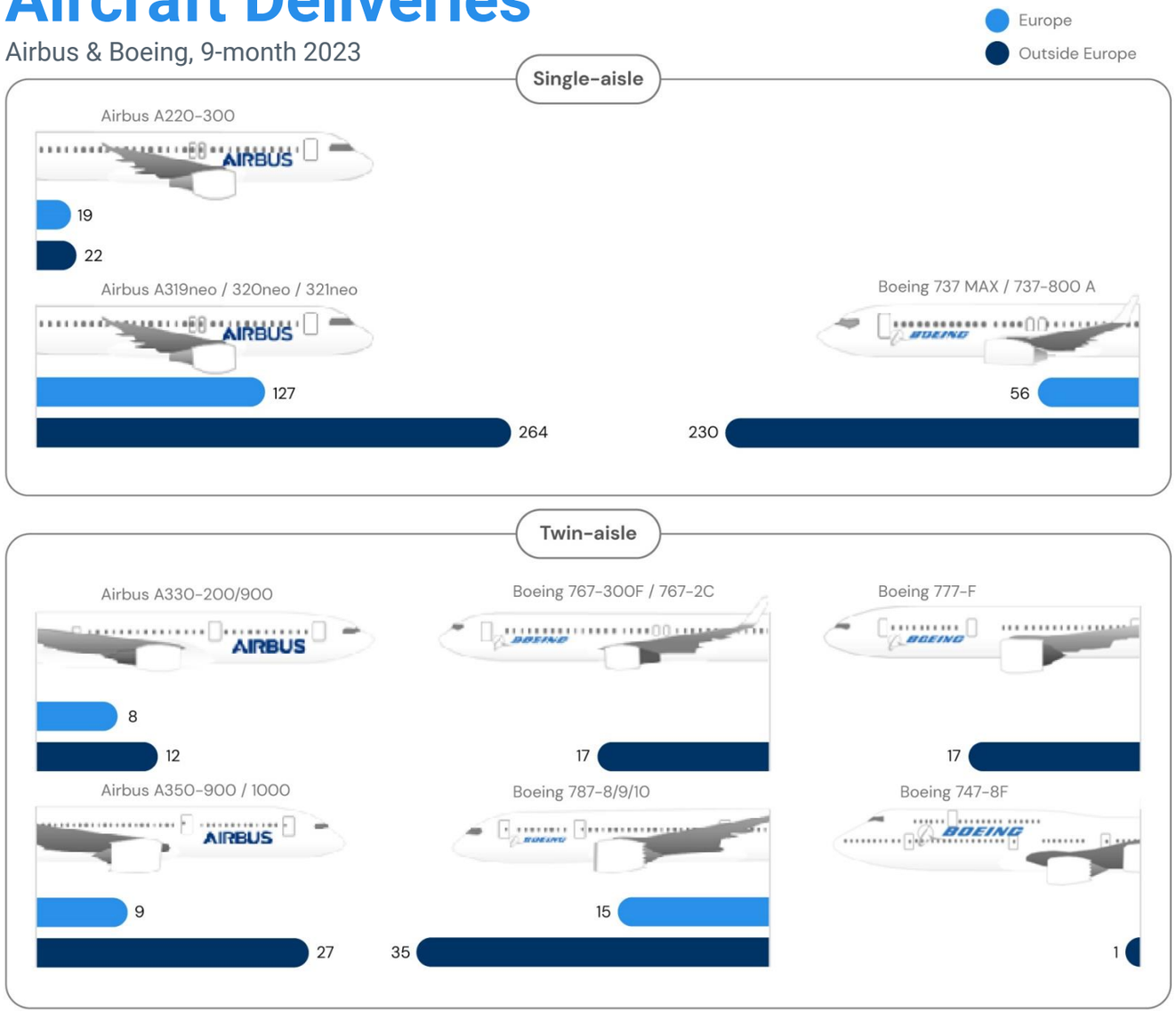


Source: IATA/Platts

- The average price of jet fuel was at $2.68/gallon on 01 December 2023, lower (-4%) than in the last Overview, and 10% lower compared 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).
- After June 2023, jet fuel prices rose when Saudi Arabia (and the Russian Federation) started to cut oil production. However, since September a slight decline has occurred.
- Last week, OPEC+ members (13 OPEC + 11 non-OPEC) including Saudi Arabia, extended their voluntary oil output reductions until the end of the first quarter of 2024 amid concerns over future fuel demand.

Aircraft Deliveries

Airbus & Boeing, 9-month 2023



For the first nine months of 2023:

- Airbus delivered 117 more aircraft (488, +32%) than Boeing (371).
- Compared with pre-pandemic deliveries, Airbus (571 aircraft) stood at 85% deliveries of the same period in 2019 while Boeing (301 aircraft) reached 123%.
- Airbus delivered 163 aircraft (33% of 9-month 2023 deliveries) vs 71 aircraft for Boeing (19%) to the European market.
- Narrowbodies largely dominated the deliveries: Airbus delivered 432 (89%) A220-A320neo family-types and Boeing 286 (77%) 737 MAX.
- Airbus far exceeds Boeing in terms of orders and deliveries during the 9-month of 2023.
- Airbus gross orders reached 1,280 aircraft (of which 1,120 narrow-bodies, 88%) compared to 848 aircraft (566 737 MAX, 67%) in 9-month 2023.

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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