AVIATION INTELLIGENCE+

EUROCONTROL

EUROPEAN AVIATION OVERVIEW

26 Jun - 02 Jul 2023

Monday 4 July 2023

Headlines

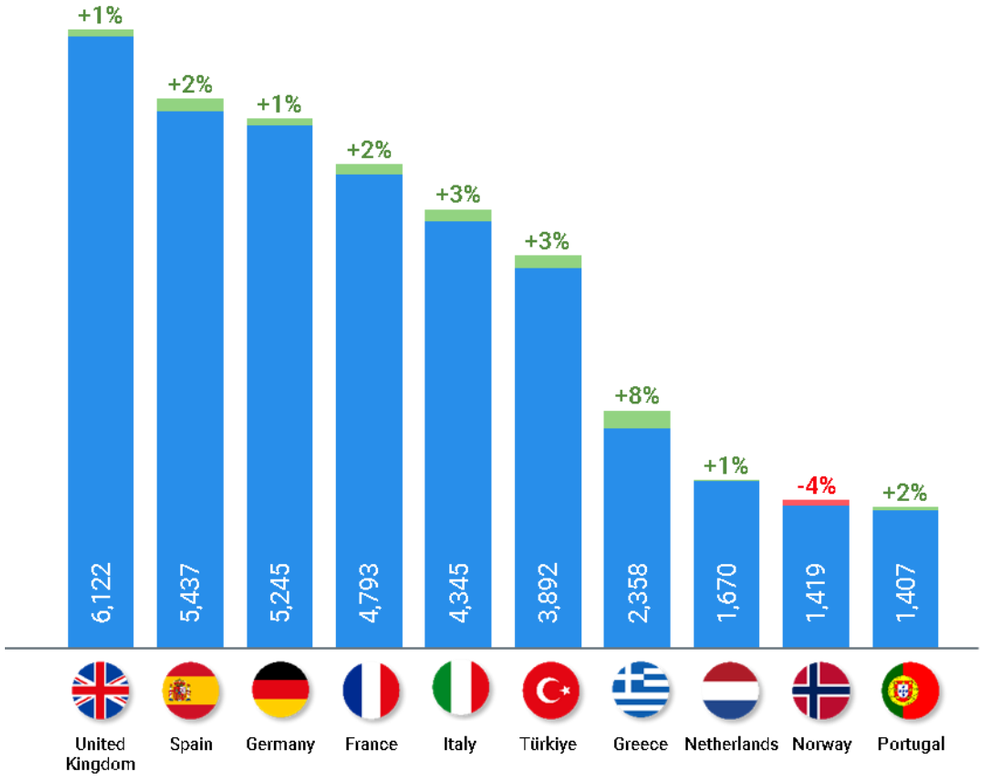
(Week 26 Jun - 02 Jul 2023)

- The Network recorded 32,998 average daily flights (+8% vs 2022), increasing (+2%) vs the previous week and standing at 93% of 2019 levels.
- On Friday 30 June 2023, the network recorded its highest number of flights (34,042) since the beginning of COVID - although still 8.5% below the record for the busiest day ever (28 June 2019).
- The Top 10 aircraft operators recorded flight growth of +2.1% vs the previous week.
- In June, the number of flights in the Network was 92% of 2019 levels, just below our Base scenario of forecasted flights released in December 2022.
- Arrival and departure punctuality continue to improve, both closing at 3 percentage points below 2019 levels.
- The jet fuel price closed at 2.32 USD/gallon on 30 June 2023, increasing (+4%) over 2 weeks. Current prices have however decreased by 25% compared to the beginning of the year.
- This Overview confirms that normal network operations have returned after the completion of Air Defender 2023 – the impacts of which on civil air traffic were very successfully minimised.

Top 10 busiest States

In Week 26 Jun - 02 Jul 2023

(All flights including overflights compared with the previous week)



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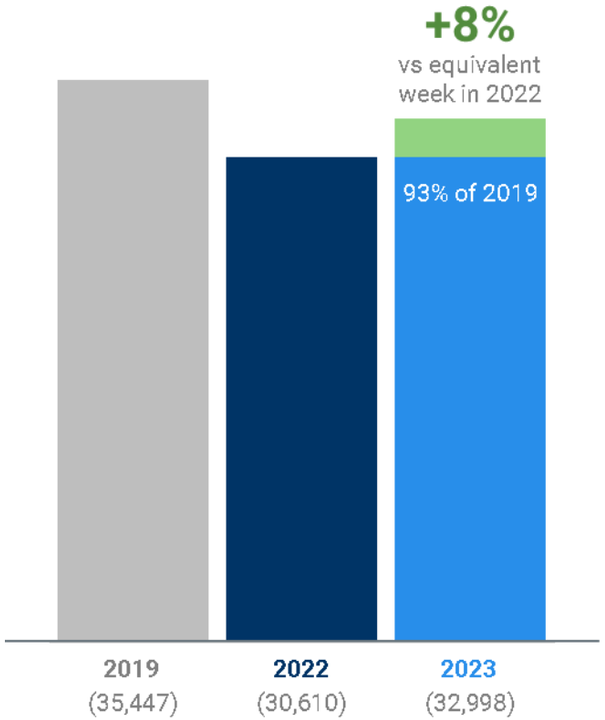
Traffic situation

Average daily flights (including overflights)

Week 26 Jun - 02 Jul 2023



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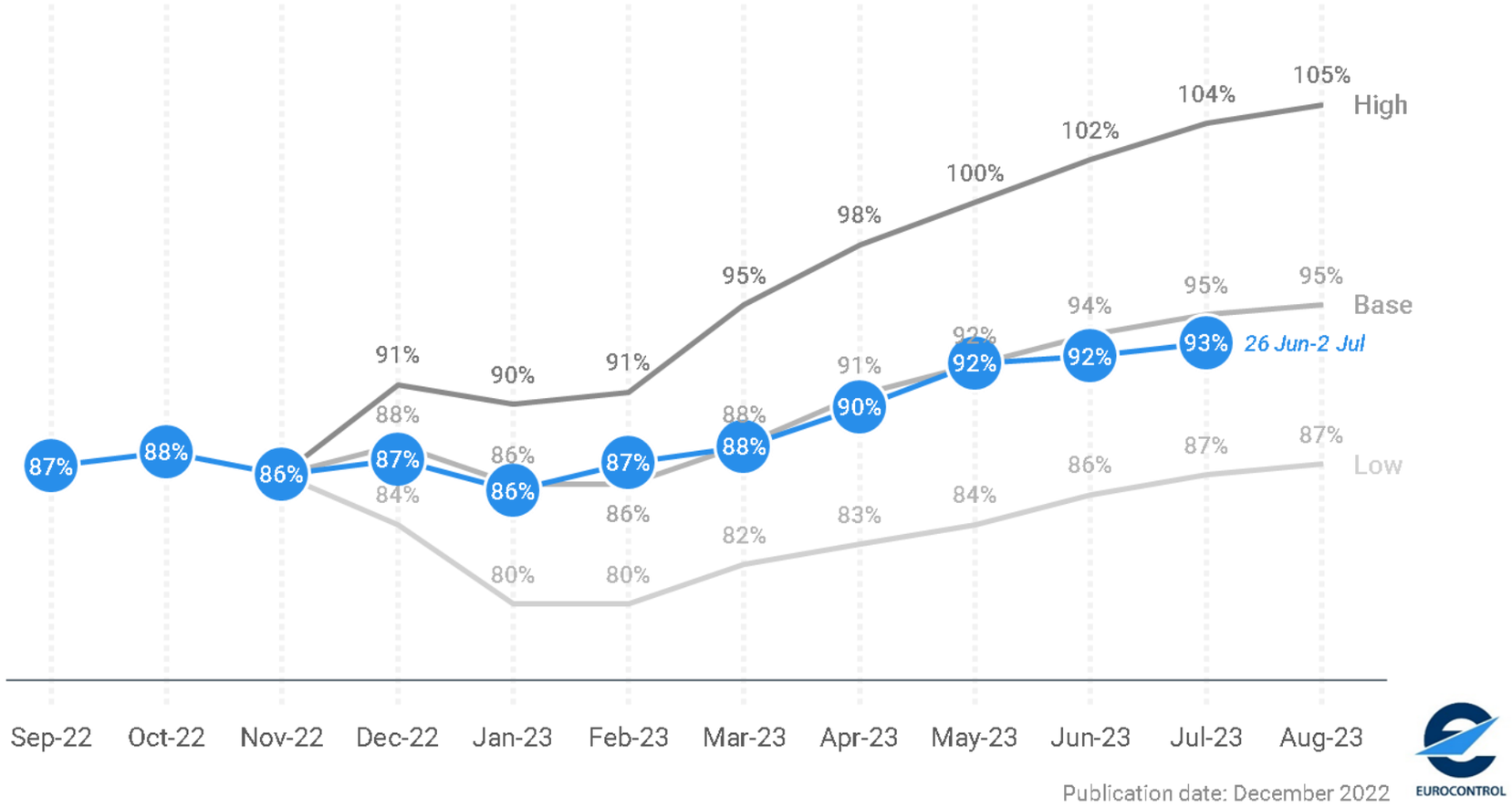
Overall situation compared to the EUROCONTROL Traffic Scenarios

(Base year 2019)



Publication date: December 2022

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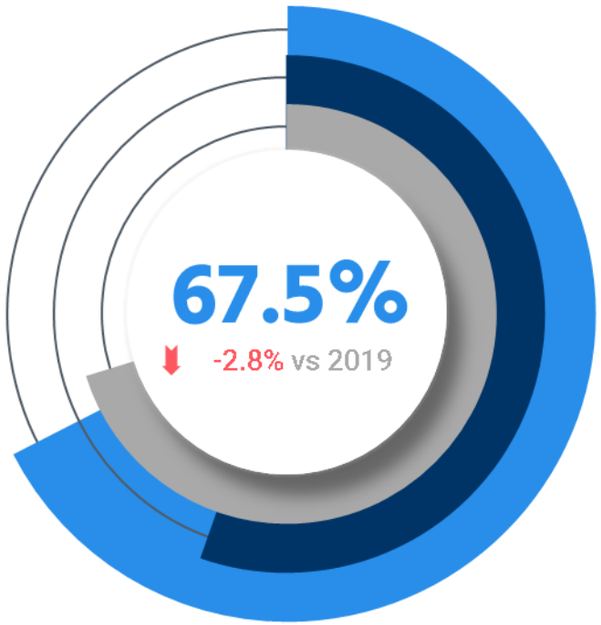
- The latest EUROCONTROL Traffic scenarios were published on 16 December 2022.
- Since that date, network traffic has evolved to very closely mirror our Base scenario.
- In June, flights closed at 92% of June 2019 levels, just below our Base scenario (94%).
- On a year-to-date basis, network traffic is at 89% of 2019, and +13% vs 2022.

Arrival & departure punctuality

(At top airports for the last week)

Week 26 Jun - 02 Jul 2023

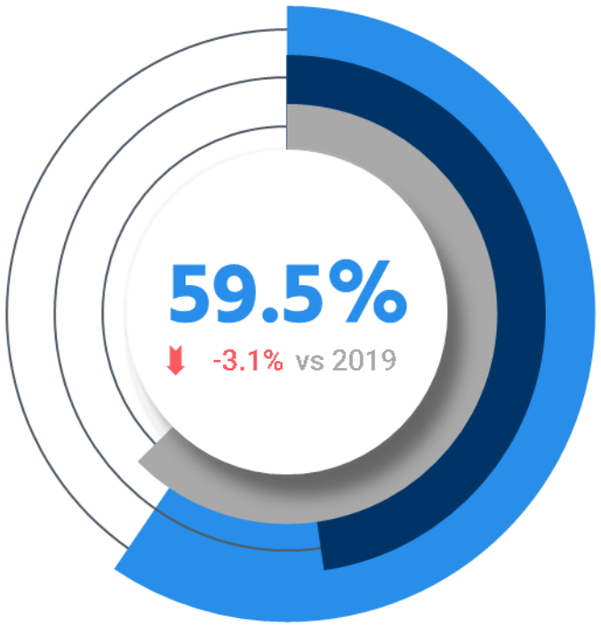
ARRIVAL PUNCTUALITY



70.2% _____ in 2019

55.4% _____ in 2022

DEPARTURE PUNCTUALITY



62.6% _____ in 2019

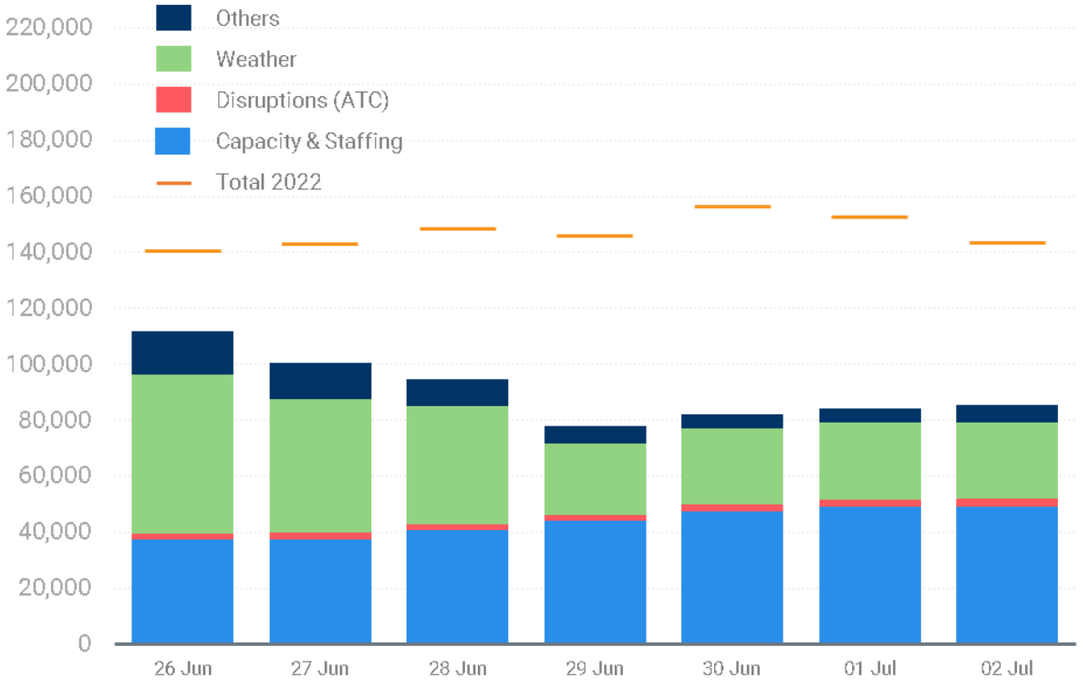
47.7% _____ in 2022

- Network punctuality decreased when compared to the equivalent week in 2019, with arrivals at 67.5% & departures at 59.5%, decreasing by 2.8 and 3.1 percentage points respectively. This was however better than the statistics in the same period in 2022.
- Weather (mainly cumulonimbus (CB) activity), ATC capacity and ATC staffing delays strongly influenced en-route delays across the network during the week. Daily en-route regulations were recorded in Greece due to ATC staffing. Weather regulations due to CB clouds affected the Balkans and alpine regions, while Barcelona ACC experienced a flight data failure on 30 June.
- Looking at airports, as the traditional summer holiday season started, leisure destination airports have become busier and some have experienced delays. Many Greek island airports were affected by ATC and aerodrome capacity delays. London Gatwick recorded aerodrome capacity delays throughout the week. Antalya Airport continues to experience aerodrome capacity delays. Finally, non-ATC industrial action occurred at Geneva Airport on 30 June.

En-route ATFM delays

Delays per cause (EUROCONTROL Area)

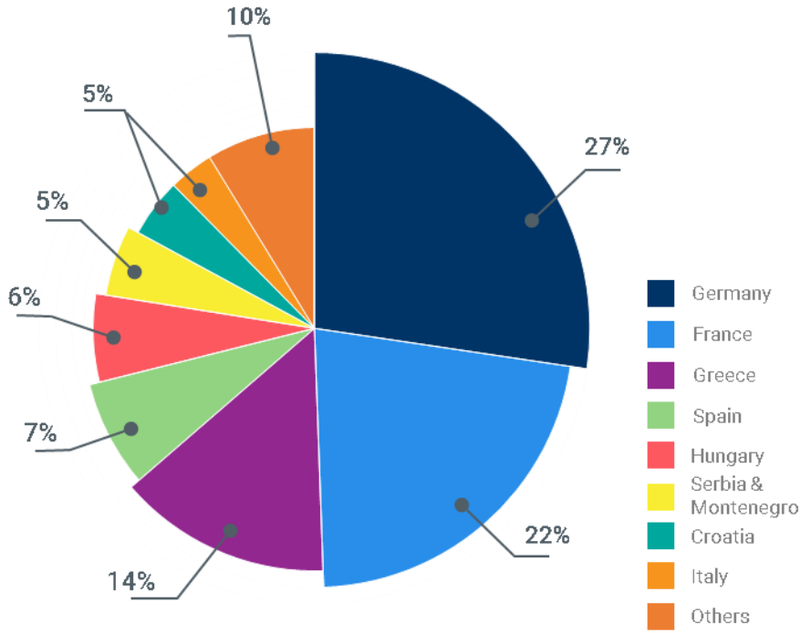
In minutes (7-day average) in 2023



- Based on a rolling week average, en-route ATFM delays have been constantly below 2022 levels.
- Last week, en-route ATFM delays were around 91,000 minutes per day on average, mainly due to weather issues as well as capacity and staffing.
- En-route ATFM delays were 36% below the same week in 2022.

Share of en-route ATFM delays

Week 26 Jun - 02 Jul 2023



- Germany accounted for 27% of all en-route ATFM delays, mainly concentrated in Karlsruhe and Munich.
- France came second with 22% of all en-route ATFM delays, mainly concentrated in the Reims, Marseille and Paris ACCs.
- After that was Greece with 14% of all en-route ATFM delays, reflecting capacity & staffing issues.

Top 10 States

Departures and arrivals

Week 26 Jun - 02 Jul 2023

No.	Country	Average daily flights	% prev week	% prev year	% 2019
1.	United Kingdom	6,122	+1%	S +7%	W -8%
2.	Spain	5,437	+2%	S +5%	W -2%
3.	Germany	5,245	+1%	S +5%	W -18%
4.	France	4,793	+2%	S +5%	W -7%
5.	Italy	4,345	+3%	S +8%	W -1%
6.	Türkiye	3,892	+3%	S +13%	S +12%
7.	Greece	2,358	+8%	S +6%	S +13%
8.	Netherlands	1,670	+1%	S +4%	W -8%
9.	Norway	1,419	-4%	S +6%	W -6%
10.	Portugal	1,407	+2%	S +8%	S +7%

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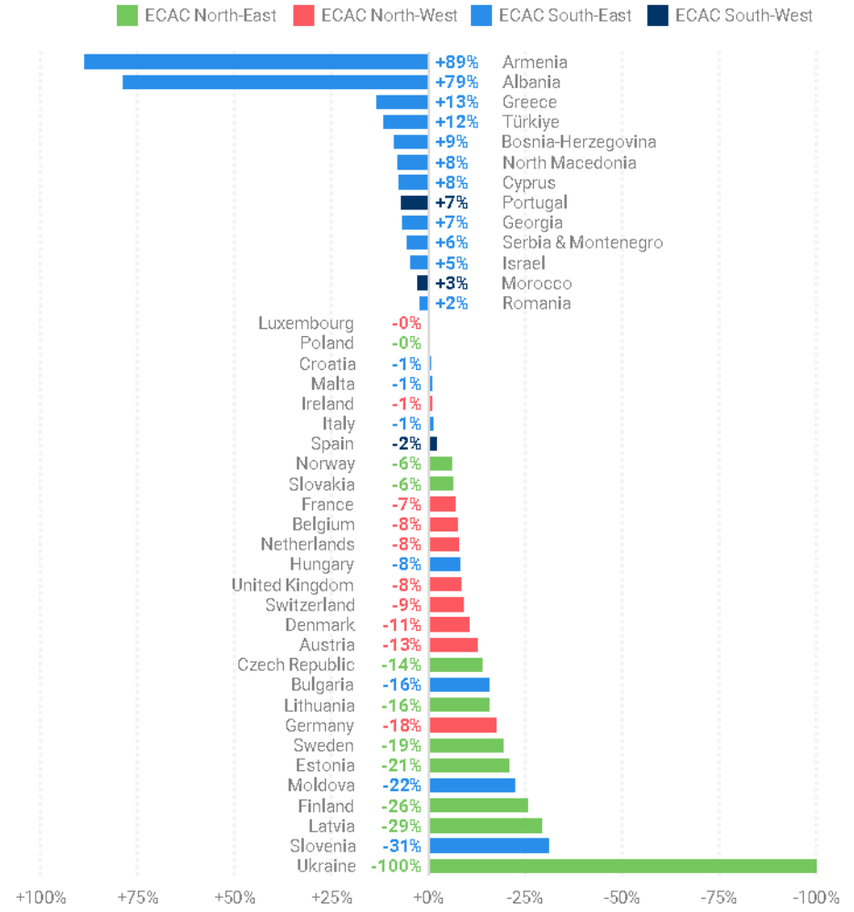
- The Top 10 States recorded higher numbers of flights (+2.2% on average) than in the previous week.
- Compared to the previous edition, Germany and Spain swapped places.
- Greece recorded an 8% growth rate owing to increases from easyJet and Wizz Air. Norway recorded a decrease of 4% owing to fewer flights operated by Widerøe, SAS and Norwegian (especially domestic flows).
- Three Top 10 States are now recording growth above 2019 levels (Türkiye, Greece and Portugal), while Spain and Italy are relatively close to their pre-COVID levels. The four remaining States however are still between 6% and 18% below 2019 levels.

States in the EUROCONTROL Network

Compared to the equivalent week in 2019

Departing/arriving flights for the period 26 Jun - 02 Jul 2023



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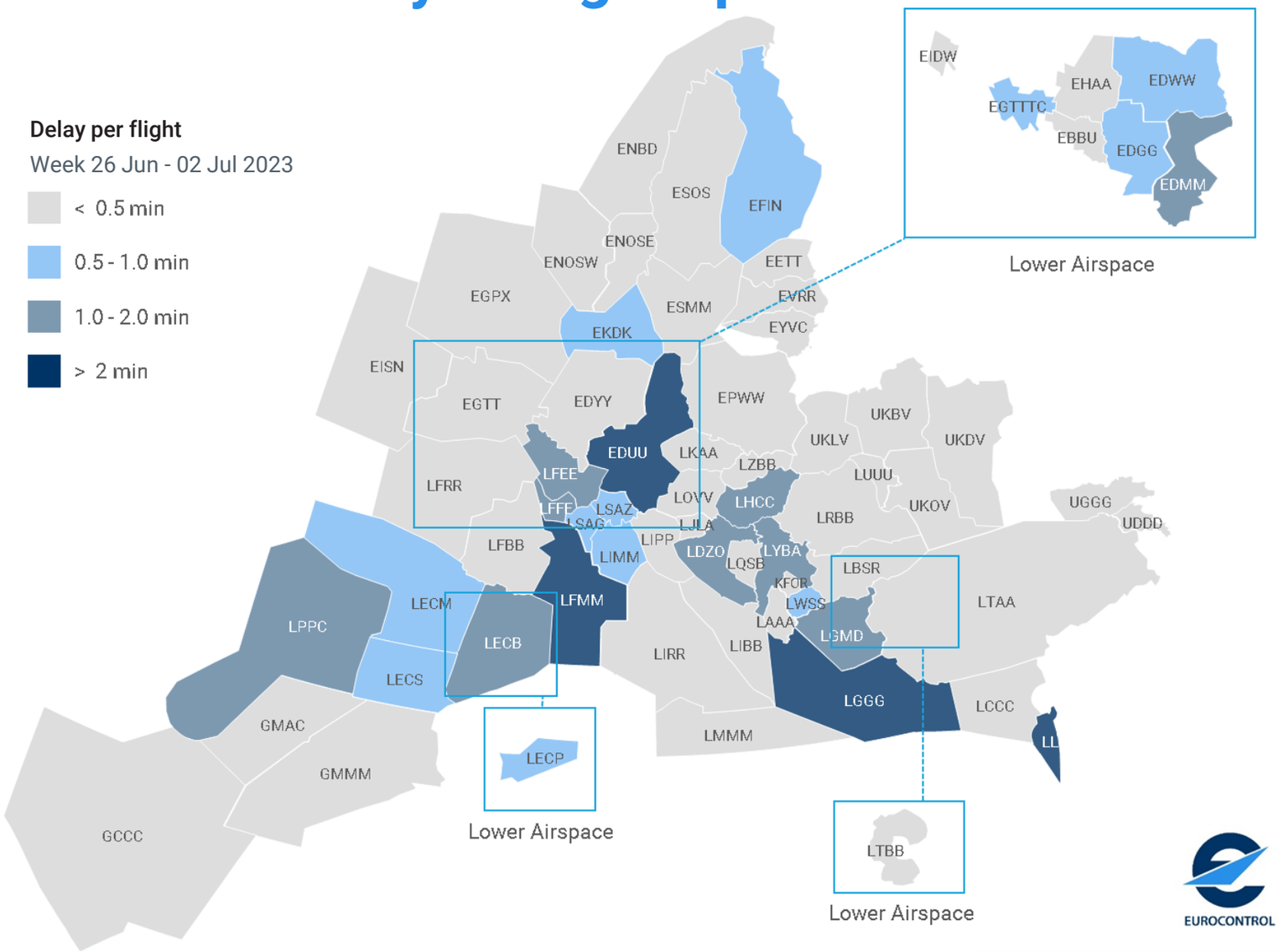
En-route ATFM delayed flights per Area Control Centre



- Over the last week, en-route ATFM delays have reduced compared to the week before, but are still high (91,000 minutes per day on average).
- Compared to the same week in 2022, en-route ATFM delays were 38% lower this year.
- Last week, the most affected ACCs were:
  - Athens ACC (4.2 min/flight) and Makedonia ACC (1.8) owing to ongoing staffing issues
  - Karlsruhe UAC (2.8) due to capacity and weather issues
  - Tel Aviv ACC (2.2)
  - Marseille ACC (2.1) due to ATC capacity as well as staffing and weather
  - Munich (2.0) due to a system implementation and transition.

Top 10 aircraft operators

Week 26 Jun - 02 Jul 2023 (average daily flights)

No.	Aircraft operator	Average daily flights	% prev week	% prev year		% 2019	
1.	Ryanair Group	3,273	+0%	S	+10%	S	+25%
2.	easyJet Group	1,732	+2%	S	+10%	W	-8%
3.	Turkish Airlines	1,685	+3%	S	+12%	S	+13%
4.	Lufthansa Airlines	1,247	+4%	S	+8%	W	-23%
5.	Air France Group	1,102	+3%	S	+4%	W	-18%
6.	Wizz Air Group	900	+3%	S	+16%	S	+36%
7.	KLM Group	875	+2%	S	+16%	W	-7%
8.	British Airways Group	839	+3%	S	+20%	W	-15%
9.	Vueling	684	+1%	W	-2%	W	-6%
10.	SAS Group	683	-2%	S	+26%	W	-20%

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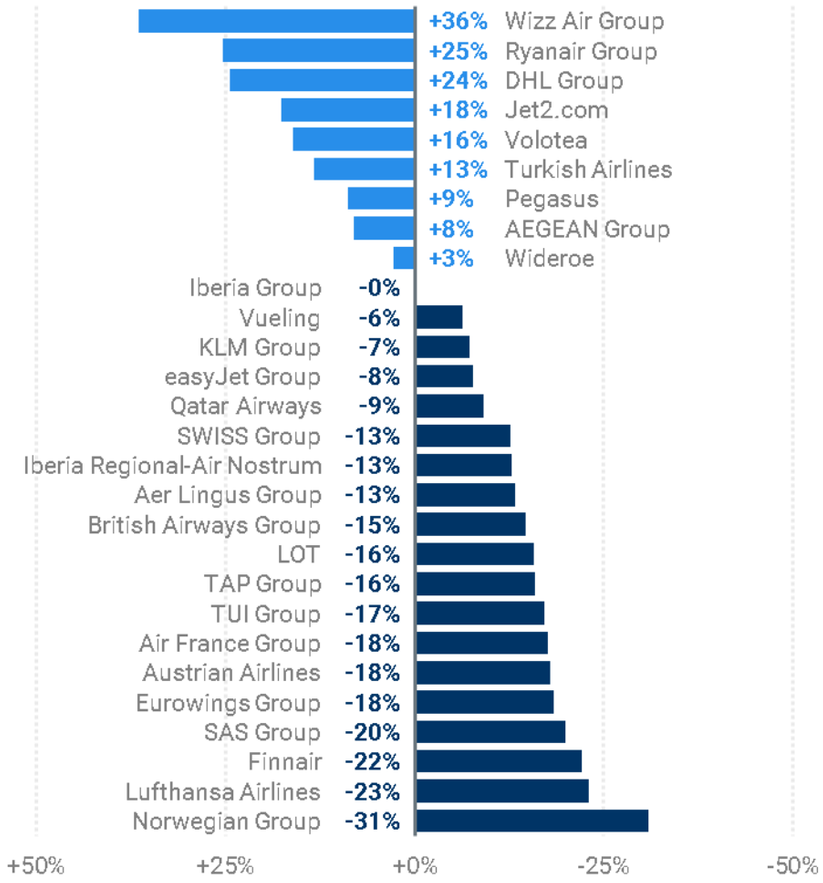
- The top 10 aircraft operators posted an increase in the number of flights (+2.2% on average) compared to the previous week.
- Last week, all but one airline/airline group had the same or more daily operations compared to the week before.
- Lufthansa posted 4% week-on-week growth, adding flights on domestic flows in Germany. Turkish Airlines, Air France Group, Wizz Air Group and British Airways each recorded a 3% growth rate.
- Three airlines within the top 10 are flying well above their 2019 flight levels, recording in the week in question +36% (Wizz Air Group), +25% (Ryanair Group) and +13% (Turkish Airlines).

Aircraft operators in the EUROCONTROL network

Compared to the equivalent week in 2019

Departing/arriving flights for the period 26 Jun - 02 Jul 2023



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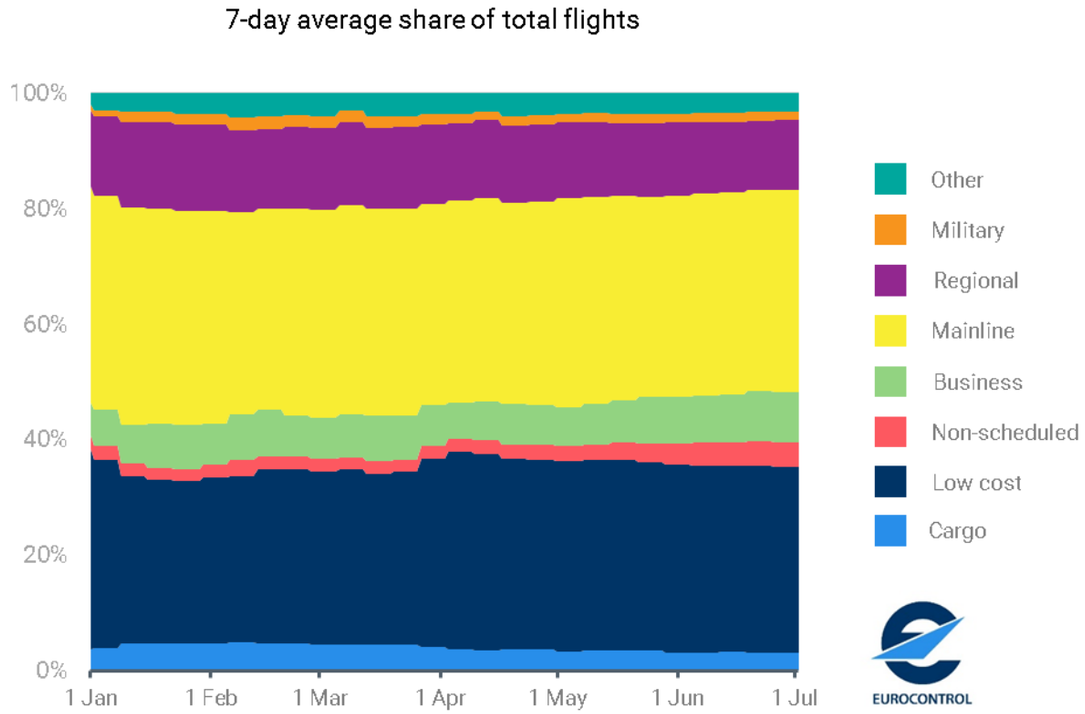
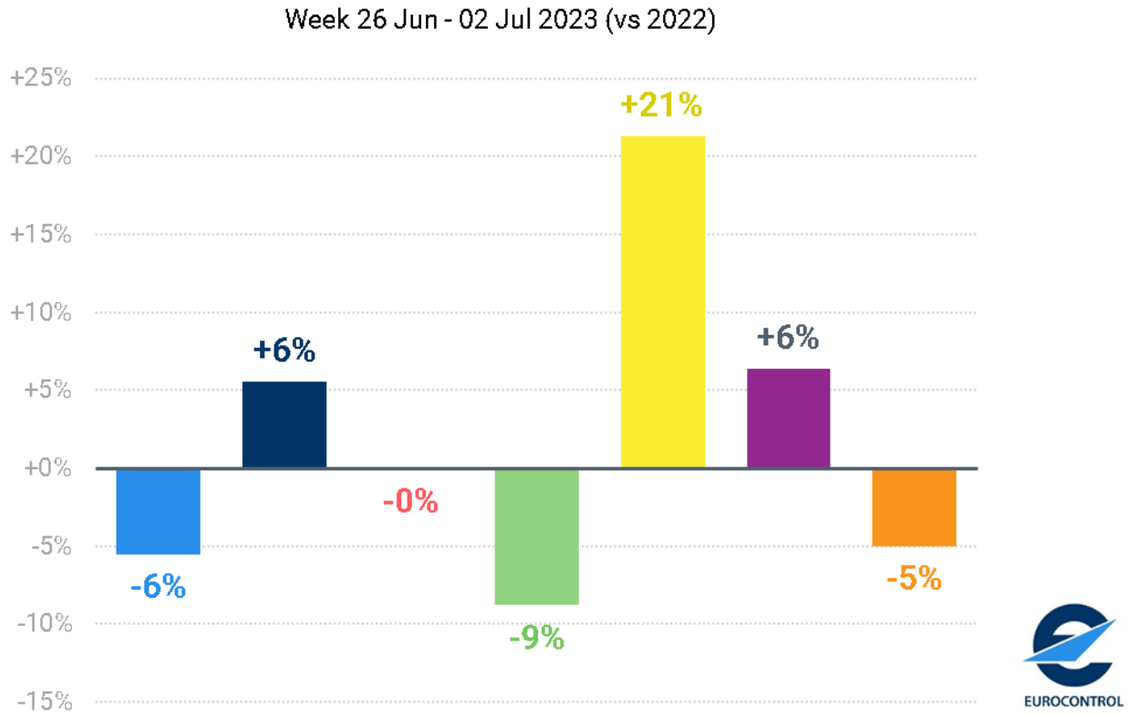
Market segments in the EUROCONTROL network

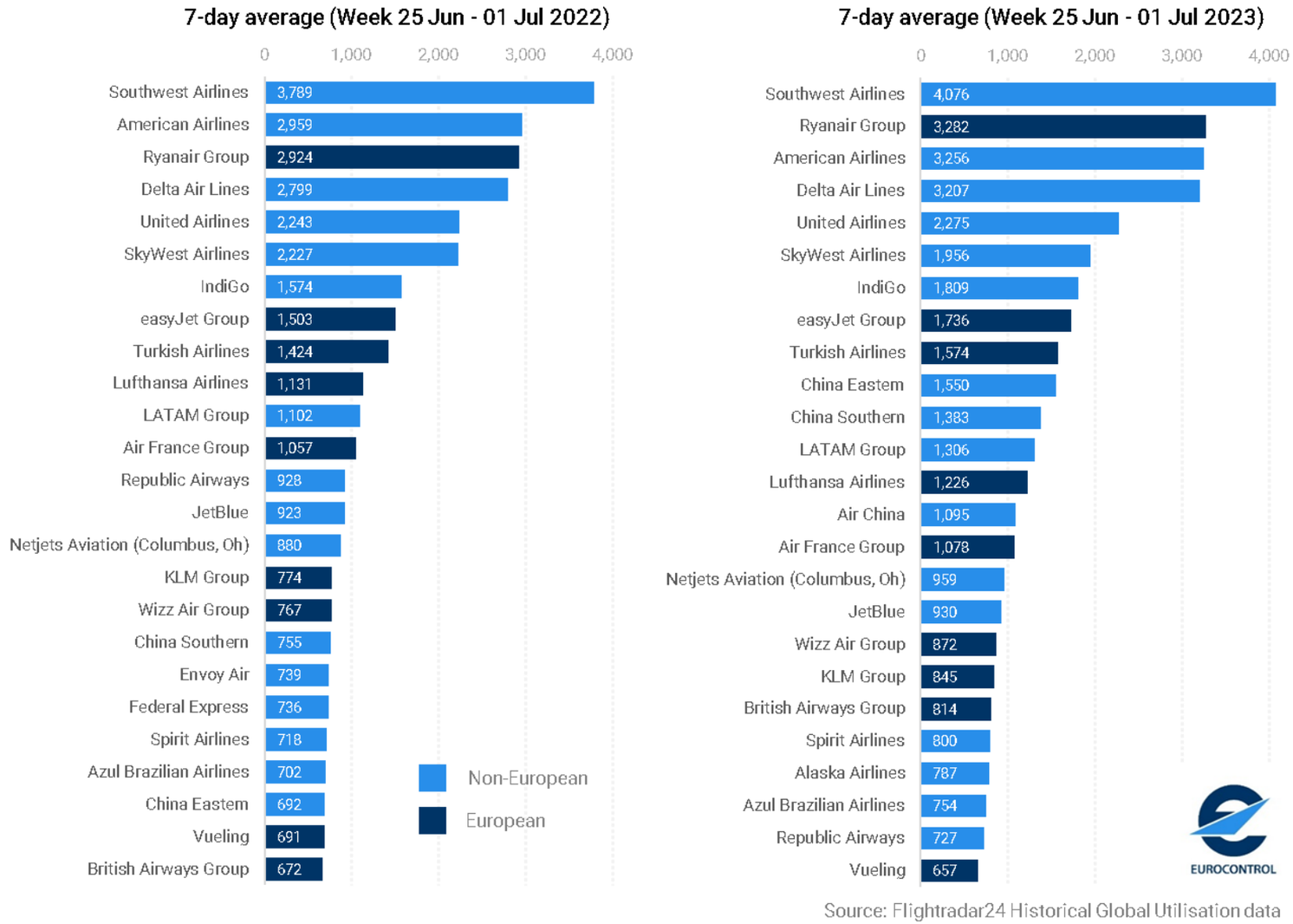




- Compared to 2022, the Mainline (+21%), Regional (+6%), and Low-cost (+6%) sectors are recording growth compared to last year, reflecting their continuing recovery since the COVID-19 outbreak owing to pent-up demand and the summer season.
- Business aviation (-9%) and All-cargo (-6%) are now recording fewer flights in 2023 compared to 2022 levels. The All-cargo market share has now stabilised (a market share of 3.2% of all flights in June 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 (8.4% of total flights in June 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 4.1% of all flights in June 2023, recorded the same traffic volumes during Week 26 Jun – 02 Jul 2023 compared to the same week in 2022.

Top 25 global aircraft operators

(Average daily departure flights)

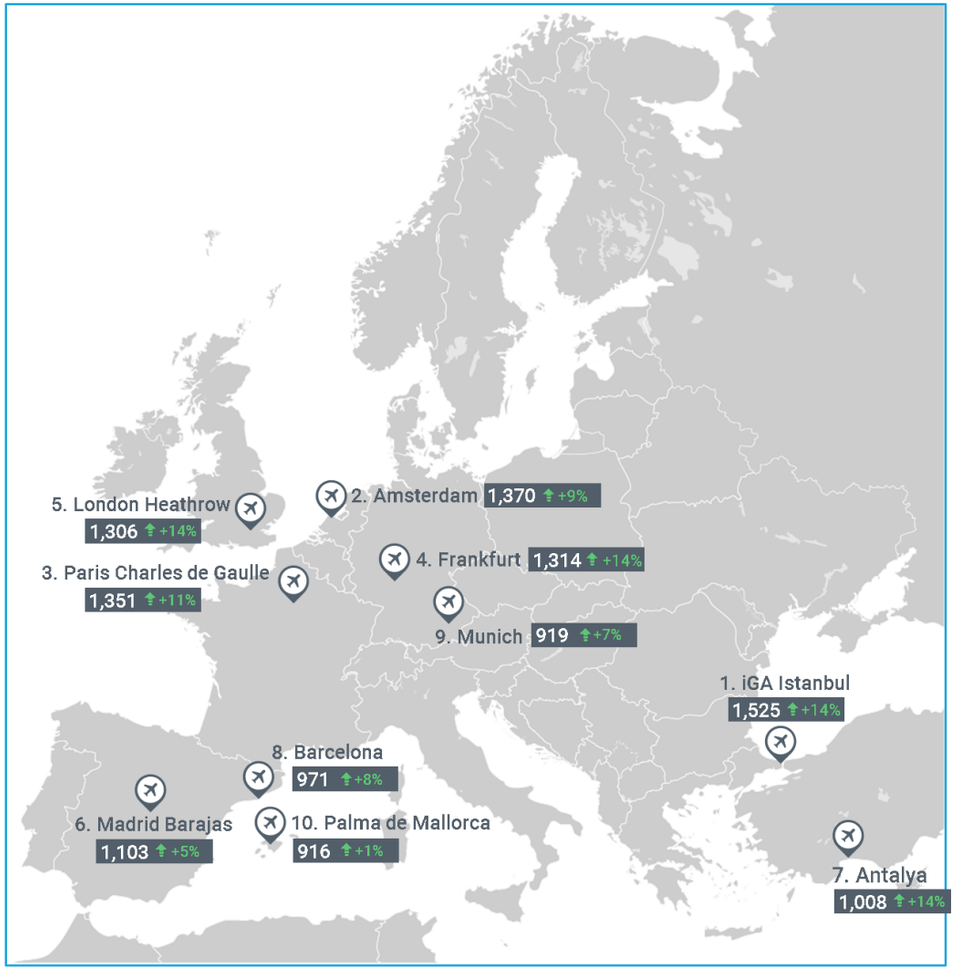


Source: Flightradar24 Historical Global Utilisation data

Over the last week:

- Nine European airlines are ranked in the Top 25 global aircraft operators (as was the case in 2022).
- The first European aircraft operator is Ryanair – now 2nd and ranked two places higher than two weeks ago.
- The other European airlines in the Top 10 are easyJet (8th) and Turkish Airlines (9th)…
- …and one more in the top 15 with Lufthansa (14th).
- Three more make the Top 20 with Wizz Air, KLM and British Airways respectively ranked 18th, 19th and 20th.
- Vueling in 25th is a new addition to the ranking.

Top 10 airports



Airport ranking

Week 26 Jun - 02 Jul 2023 (vs 2019)

No.	Airport	Avg. daily dep/arr flights	vs 2022	vs 2019
1.	iGA Istanbul	1,525	S +14%	S +19%
2.	Amsterdam	1,370	S +9%	W -8%
3.	Paris Charles de Gaulle	1,351	S +11%	W -10%
4.	Frankfurt	1,314	S +14%	W -16%
5.	London Heathrow	1,306	S +14%	W -5%
6.	Madrid Barajas	1,103	S +5%	W -13%
7.	Antalya	1,008	S +14%	S +12%
8.	Barcelona	971	S +8%	W -10%
9.	Munich	919	S +7%	W -27%
10.	Palma de Mallorca	916	S +1%	S +2%

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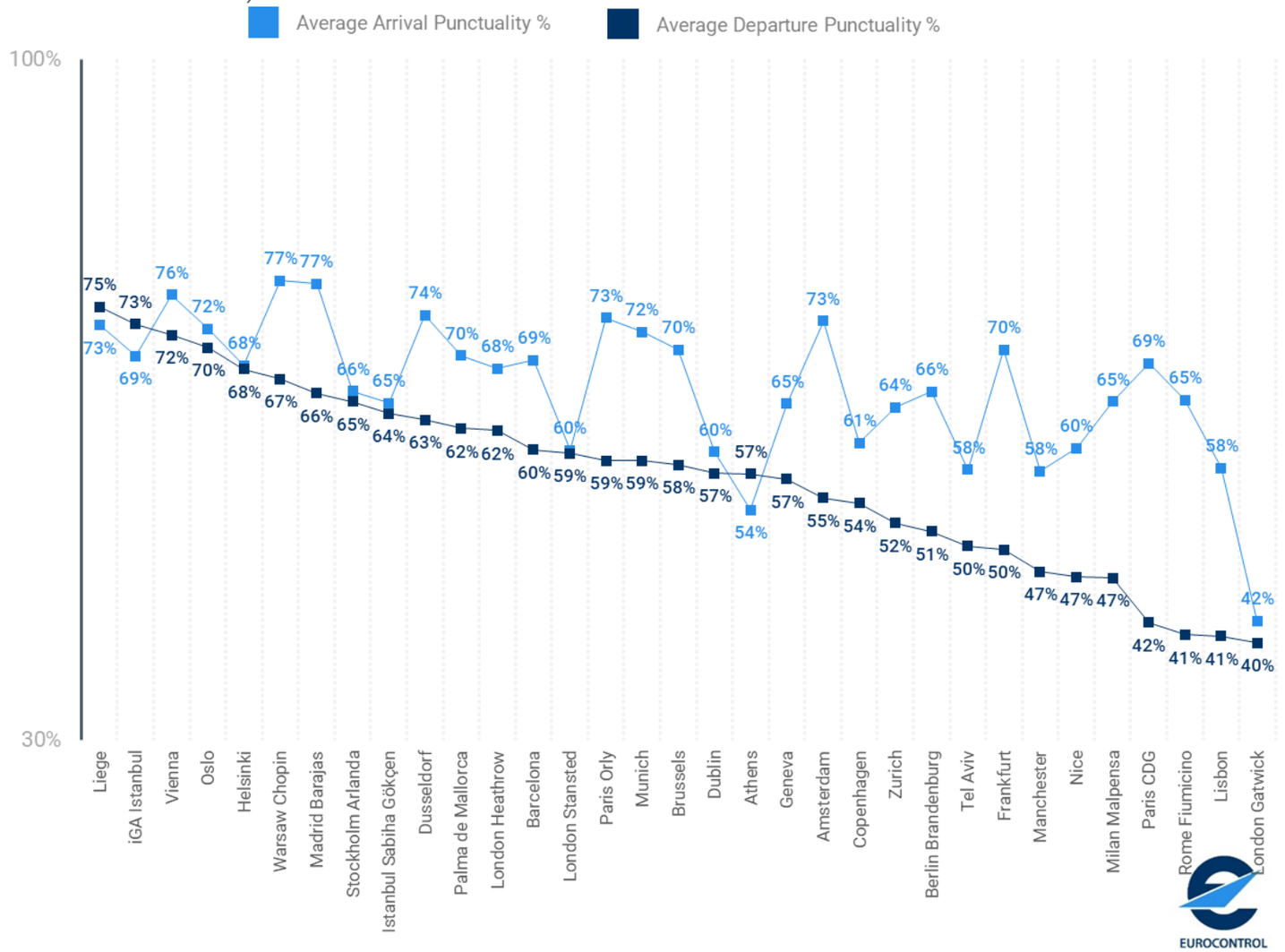
- Some changes in the ranking compared to the previous edition: Munich and Antalya swap places.
- All airports experienced sustained growth vs 2022, ranging from 1% (Palma de Mallorca) to 14% (iGA Istanbul, Frankfurt, London Heathrow and Antalya).
- Three Top 10 airports – iGA Istanbul, Antalya and Palma de Mallorca – are currently handling traffic above their 2019 levels.

Average arr/dep punctuality at main airports

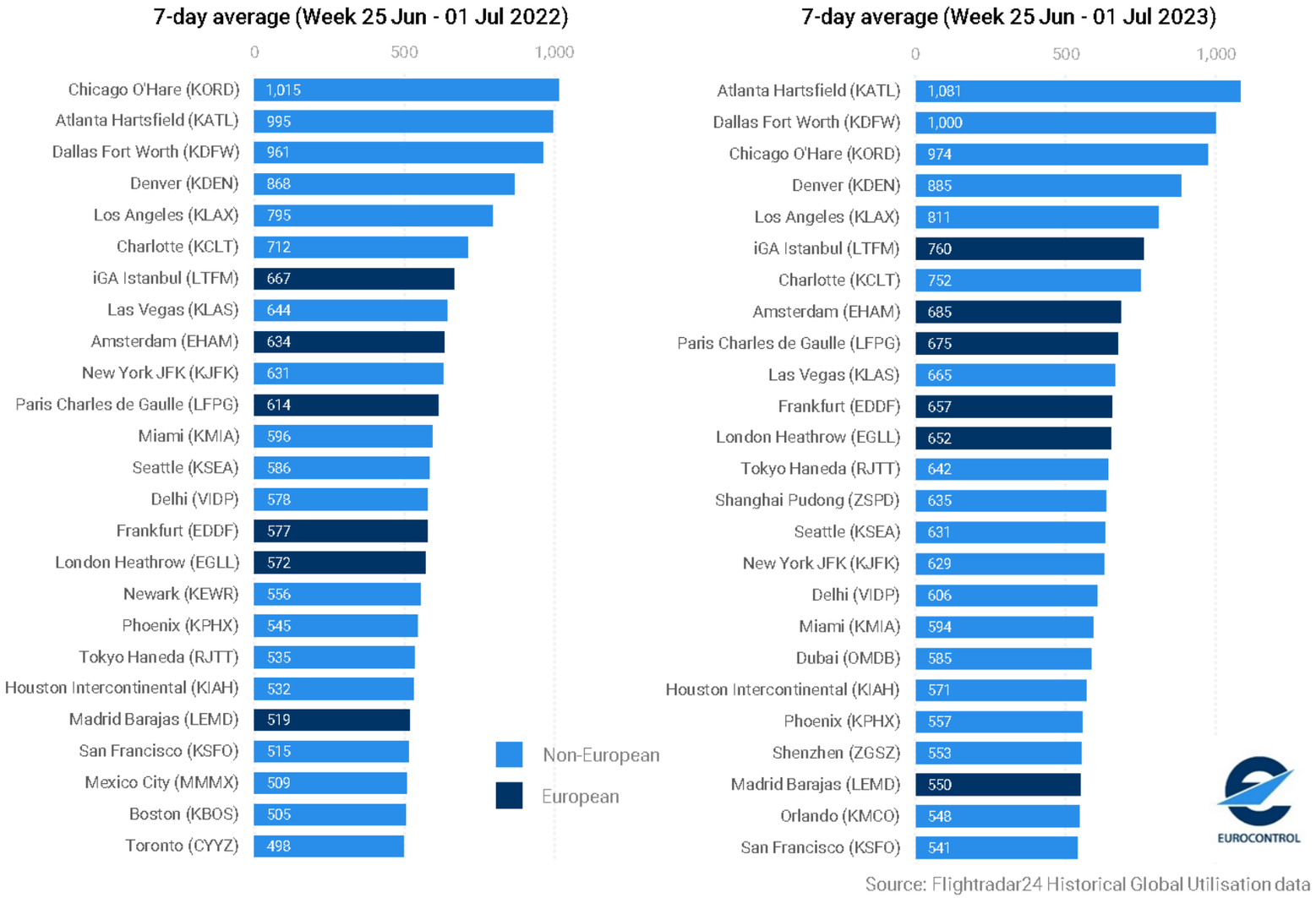
(Week 26 Jun - 02 Jul 2023)



- 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 Liège, iGA Istanbul Airport and Athens, have a 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)



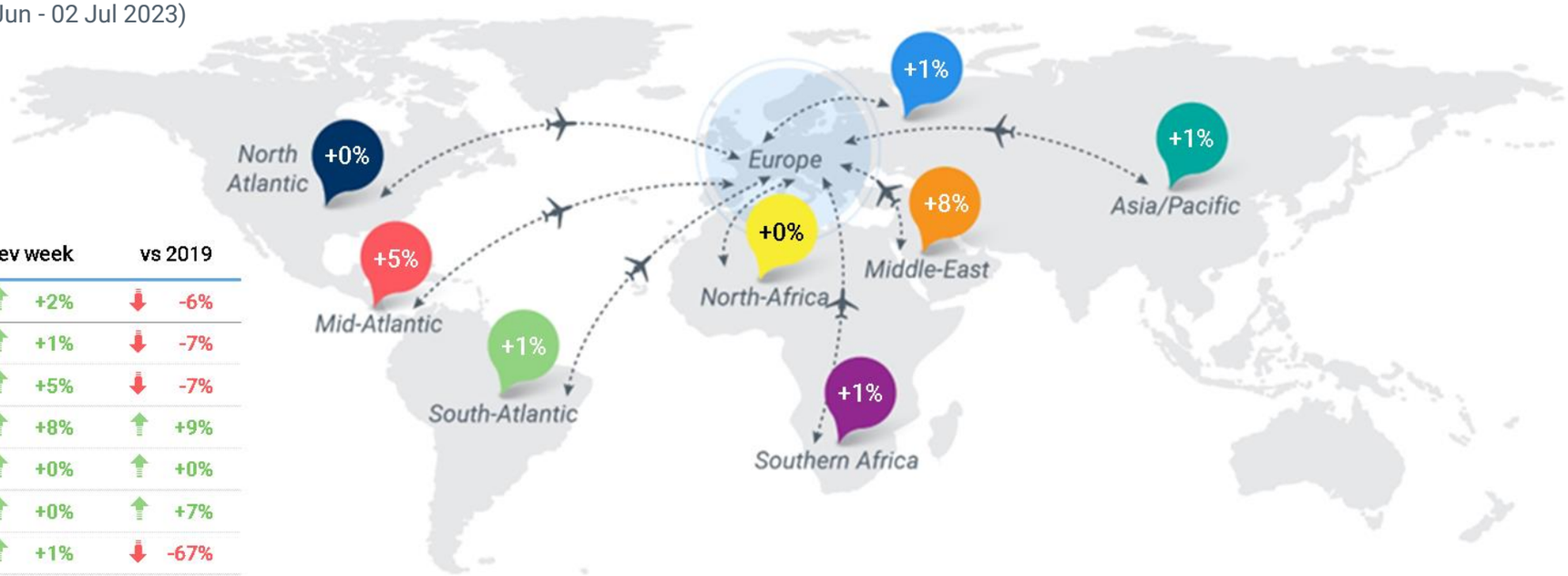
Source: Flightradar24 Historical Global Utilisation data

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 (6th) is iGA Istanbul Airport, now one place ahead of 2022.
- The other European airports in the Top 25 are Amsterdam (8th), CDG (9th), Frankfurt (11th), London Heathrow (12th) and Madrid (23rd).
- The first Chinese airport to make the 2023 list is Shenzhen (22nd), with none appearing in the Top 25 a year ago.

Traffic flows

(Average daily departure/arrival flights for Week 26 Jun - 02 Jul 2023)



Region	Average daily flights	vs prev week	vs 2019
Intra-Europe	25,932	+2%	-6%
Europe ↔ Asia/Pacific	767	+1%	-7%
Europe ↔ Mid-Atlantic	159	+5%	-7%
Europe ↔ Middle-East	1,723	+8%	+9%
Europe ↔ North Atlantic	1,488	+0%	+0%
Europe ↔ North-Africa	1,225	+0%	+7%
Europe ↔ Other Europe	440	+1%	-67%
Europe ↔ South-Atlantic	175	+1%	-9%
Europe ↔ Southern Africa	286	+1%	-5%
Non Intra-Europe	6,264	+2%	-11%

- The main traffic flow was intra-European with 25,932 daily flights last week, higher (+2%) than the previous week. Intercontinental flows recorded 6,264 daily flights on average last week, +2% vs the previous week.
- The second-largest regional flow is between Europe and the Middle East: 1,723 average daily flights last week represented an increase of +8% vs the previous week, the highest rate of increase.
- The third flow is to/from North America with 1,488 daily flights, in line (0%) with the previous week's values.
- The fourth flow is to/from North Africa, with 1,225 flights per day, stable vs the previous week.
- Flows with Other Europe (including the Russian Federation) remain massively reduced at -67% compared to 2019.
- Flows between Europe and Asia/Pacific are still lagging behind but to an increasingly lesser extent, now only -7% compared to 2019. European flows with China were at 196 daily flights on average in June 2023 (30% below June 2019 levels).

Top 10 long-haul country pairs

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

Week 26 Jun - 02 Jul 2023

No.	Country pair	Average daily flights	% prev week	% prev year	% 2019
1.	UK ↔ US	328	-1%	+12%	-2%
2.	Germany ↔ US	178	+1%	+5%	-0%
3.	France ↔ US	150	-2%	+27%	+6%
4.	Italy ↔ US	98	+3%	+23%	+12%
5.	Netherlands ↔ US	79	-0%	-6%	-11%
6.	Spain ↔ US	75	-1%	+0%	-11%
7.	Ireland ↔ US	73	-5%	+9%	-1%
8.	UAE ↔ UK	61	+4%	+36%	-6%
9.	Canada ↔ UK	50	+2%	-6%	-10%
10.	Canada ↔ France	44	+8%	+14%	+5%

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- There have been a few changes in the rankings over the previous week for the Top 10 long-haul country pairs. Spain ↔ US and Ireland ↔ US have swapped places, while Switzerland ↔ US exited the top 10 to be replaced by Canada ↔ France.
- Half of the flows posted an increase or remained stable vs the previous week (ranging from +1% to +8%).
- 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.
- Only three flows are currently above 2019 levels (France ↔ US, Italy ↔ US and Canada ↔ France).

Economics

Week 26 Jun - 02 Jul 2023

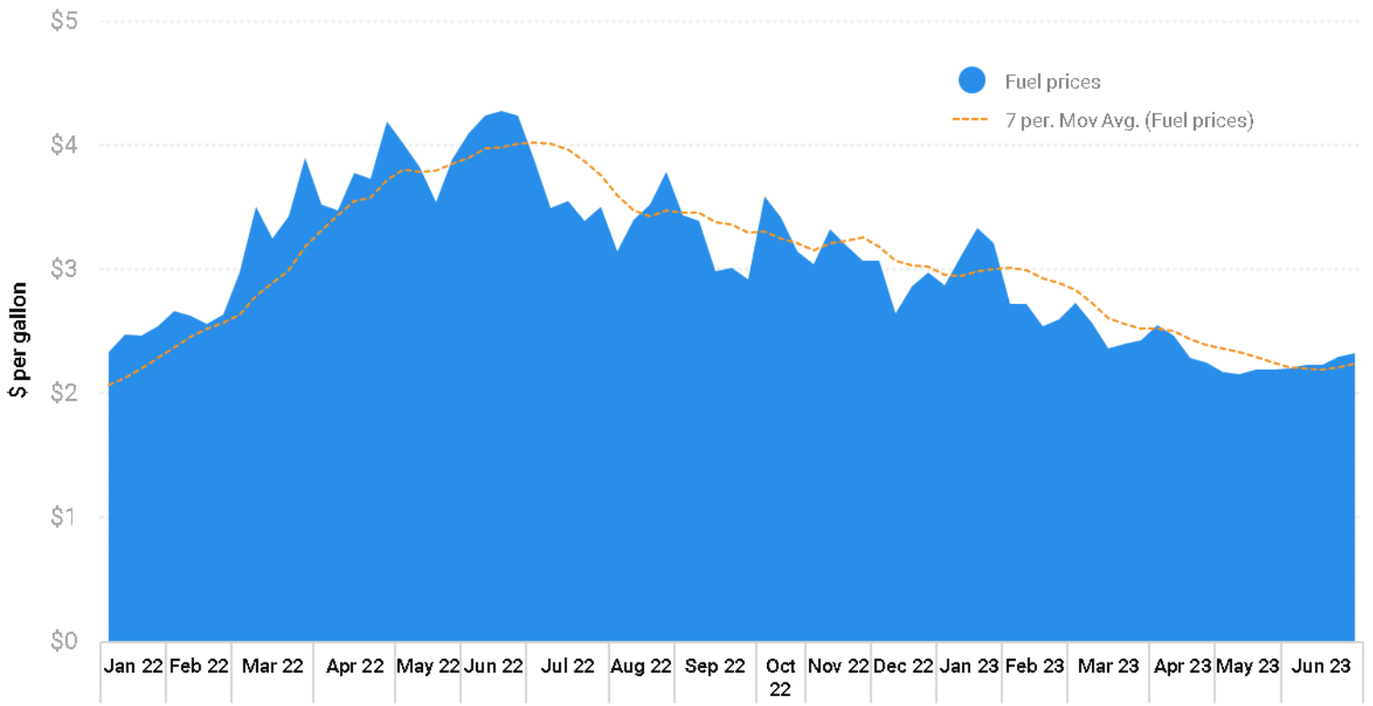
30 Jun 2023
avg fuel price:

$2.32 /gallon

4%
vs. $2.23 /gallon
on 09 Jun 2023

Source: IATA/Platts

Jet fuel price (Europe)

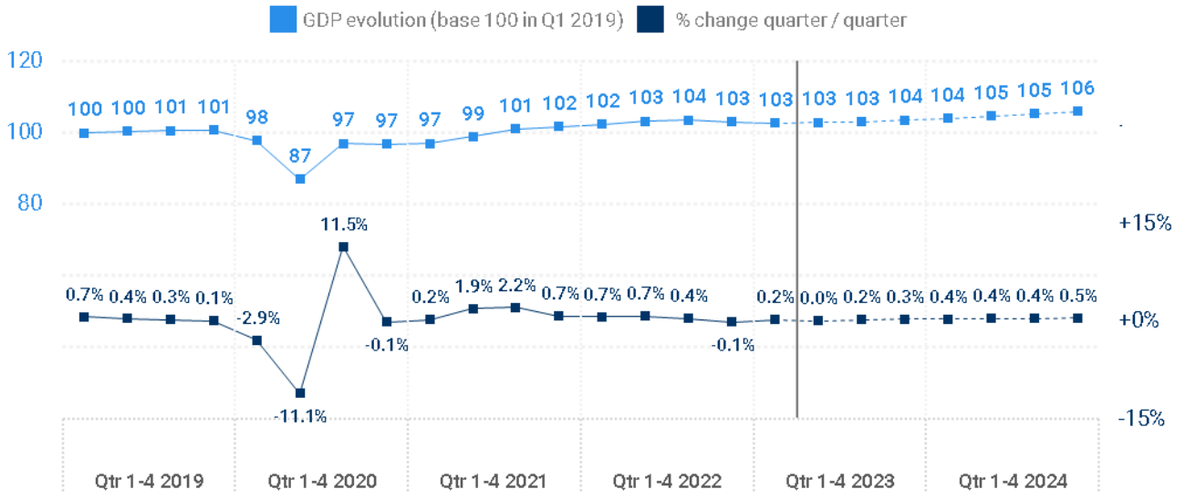


Source: IATA/Platts

- The average price of jet fuel increased to 2.32 USD/gallon on 30 June, an increase of 4% compared to the last Overview, but 25% lower than the beginning of 2023.
- Based on a moving average trend, fuel prices in Europe have been declining since June 2022, from $4/gallon down to $2.32/gallon at the end of June 2023.

GDP in the European Union

Constant prices and exchange rate, in euro

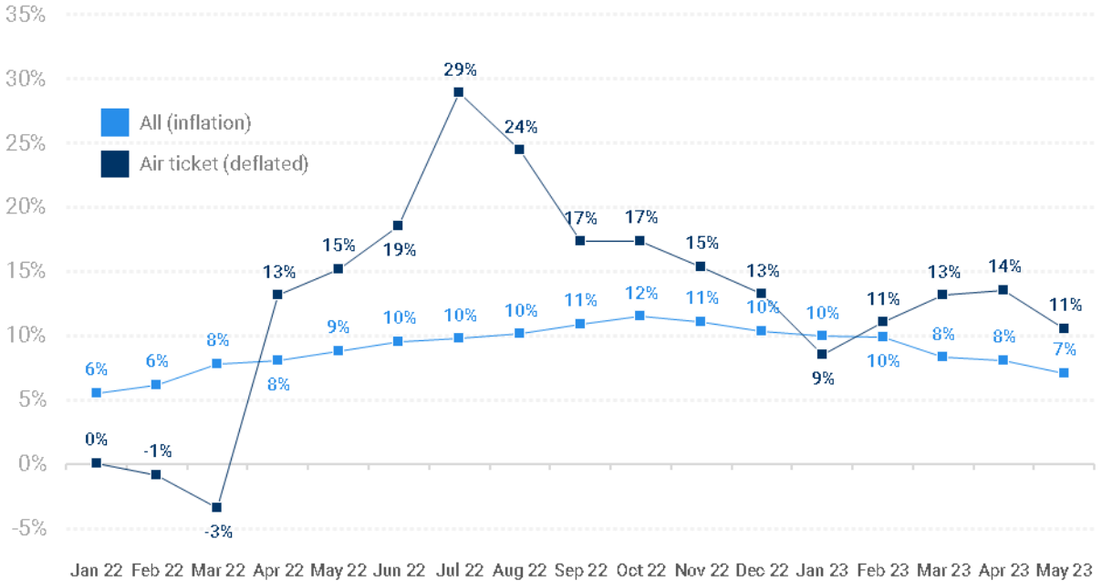


Source: Oxford Economics Ltd.

- According to the latest GDP forecast from Oxford Economics, EU27 economies posted positive growth in Q1 2023 (+0.2% vs Q1 2022, revised up from 0.1% in the previous forecast). They returned to growth in Q1 2023 vs Q1 2022, and should remain stable during Q2 2023. The quarterly rate should then climb up to +0.5% by Q4 2024 (vs Q4 2023).
- In terms of index, with 2019 as base 100, 2023 should reach 103, and 2024 105.

Price change per month (EU27)

Values compare to the same month of the previous year



Source: EUROSTAT

The latest information from EUROSTAT shows that:

- In May 2023, ticket prices were 11% above May 2022, while all-prices inflation was around 7% higher.
- Overall, in 2022 air ticket prices were 16% higher than 2021 (peaking at +29% in July 2022), reflecting inter alia sustained demand, reduced flight choice and high fuel prices.

Air Defender 2023 military exercise

12-22 June 2023

#AirDefender in numbers

Military mission

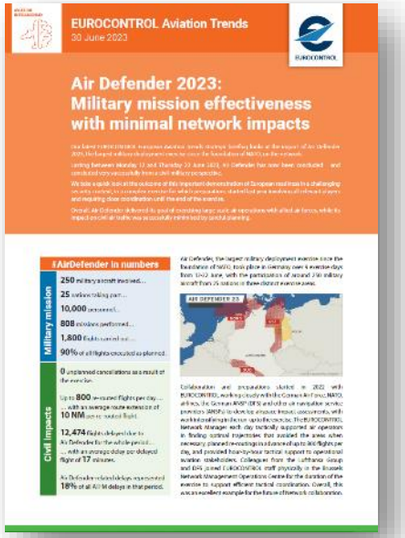
- **250** military aircraft involved…
- **25** nations taking part…
- **10,000** personnel…
- **808** missions performed…
- **1,800** flights carried out…
- **90%** of all flights executed as planned.

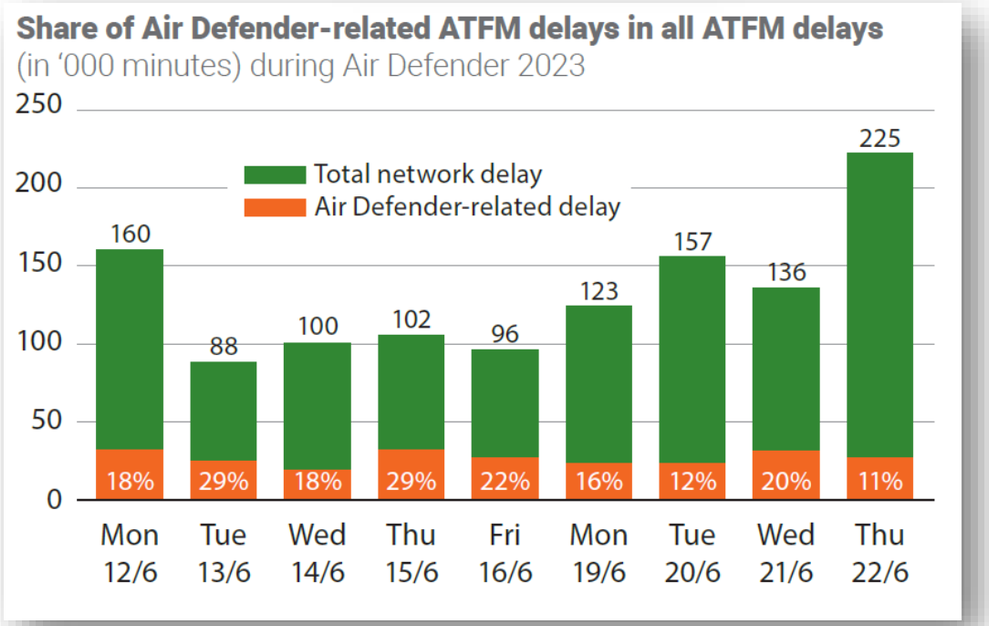
Civil impacts

- **0** unplanned cancellations as a result of the exercise.
- Up to **800** re-routed flights per day…. … with an average route extension of **10 NM** per re-routed flight.
- **12,474** flights delayed due to Air Defender for the whole period… … with an average delay per delayed flight of **17** minutes.
- Air Defender-related delays represented **18%** of all ATFM delays in that period.

SELECTED TRAFFIC AVOIDING AIR DEFENDER 23 AREAS

Up to 800 re-routed flights per day with an average route extension of
10 NM per re-routed flight





Supporting European Aviation

EUROCONTROL

To further assist you in your analysis, EUROCONTROL provides the following additional data resources:

1. EUROCONTROL Aviation Intelligence Portal:
   www.eurocontrol.int/Economics/
   This dashboard provides daily traffic data – updated daily at 07:30 CEST – on Day+1 for all European States; for the largest airports; for each Area Control Centre (ACC); and for 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 – published every Friday – covers a rolling six-week period and consolidates data from 350 airlines, 68 area control centres, 55 airports and 43 States. It provides aviation's key actors with the global view they need to plan effectively as traffic nears a full recovery.

For more information, email us at aviation.intelligence@eurocontrol.int