Supporting European Aviation

EUROCONTROL

AVIATION INTELLIGENCE+

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EUROPEAN AVIATION OVERVIEW

23-29 Aug 2023

Thursday 31 August 2023

Headlines

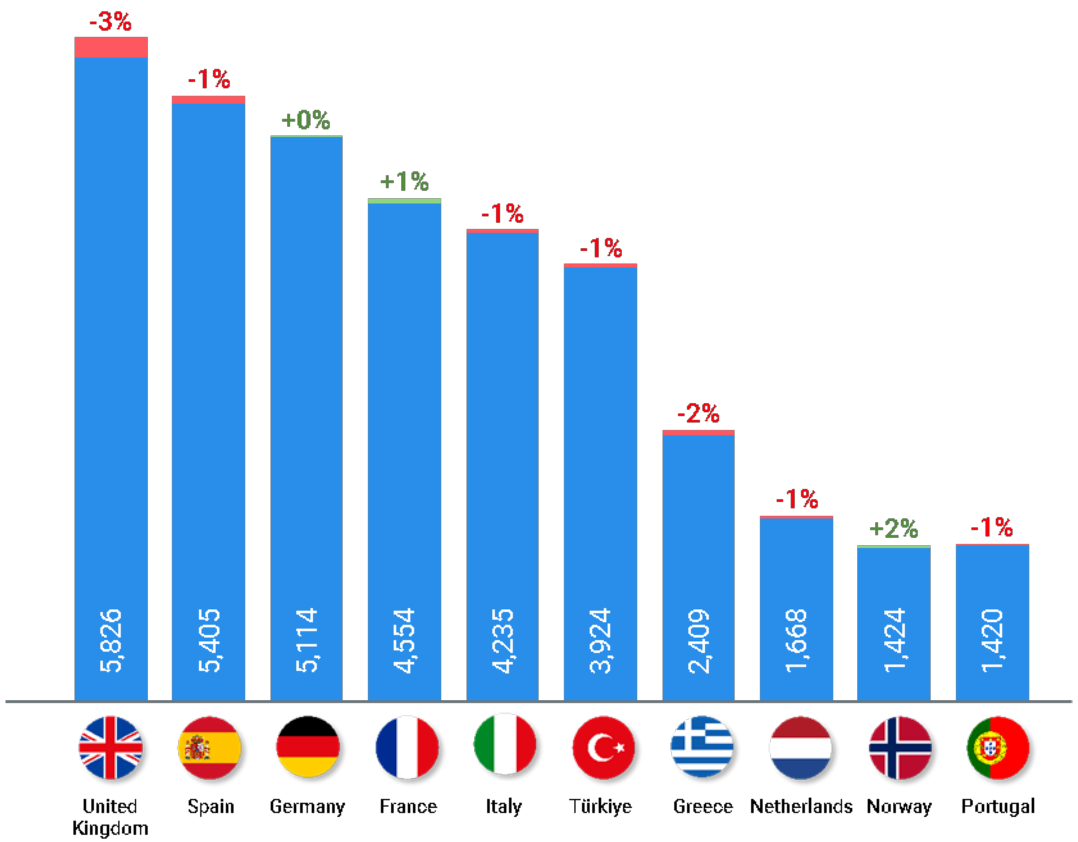
(Week 23-29 Aug 2023)

- The Network recorded 32,450 average daily flights (+5% vs 2022), remaining stable (-0.5%) vs the previous week and standing at 92% of 2019 levels.
- For the month of August, 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 fewer flights (-2%) vs the previous week; this decrease was mainly explained by the technical issue affecting the NATS flight planning system on Monday 28 August.
- The weather, together with the issue at NATS, had an impact on average delays and on punctuality. Arrival and departure punctuality deteriorated, both closing at 15 percentage points below 2019.
- The jet fuel price closed at 3.0 USD/gallon on 25 August 2023, stable over two weeks. Current prices have however increased by 5% compared to the beginning of the year.
- In July 2023, all-prices inflation stood at 6%; air ticket prices increased by 1% above inflation.

Top 10 busiest States

On week 23-29 Aug 2023

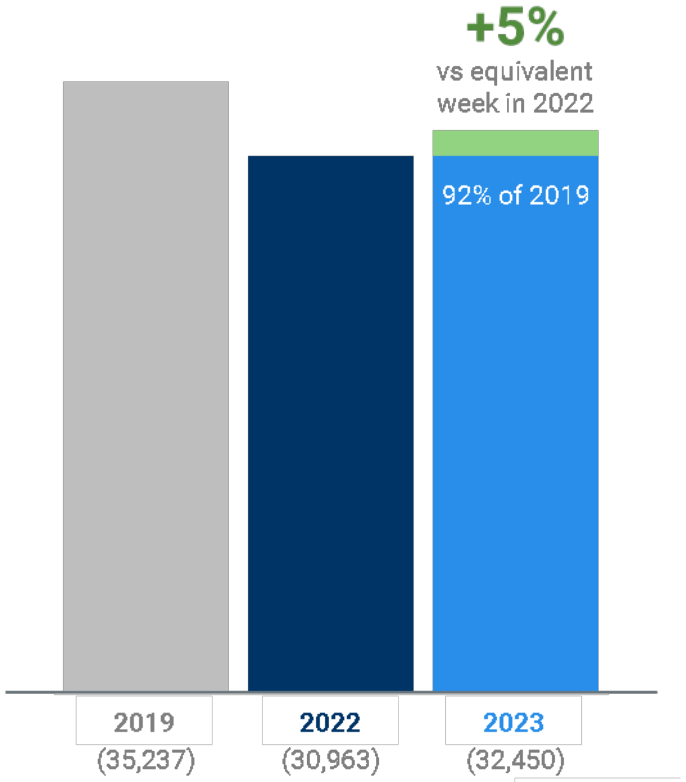
(all flights incl. overflights compared with previous week)



Traffic situation

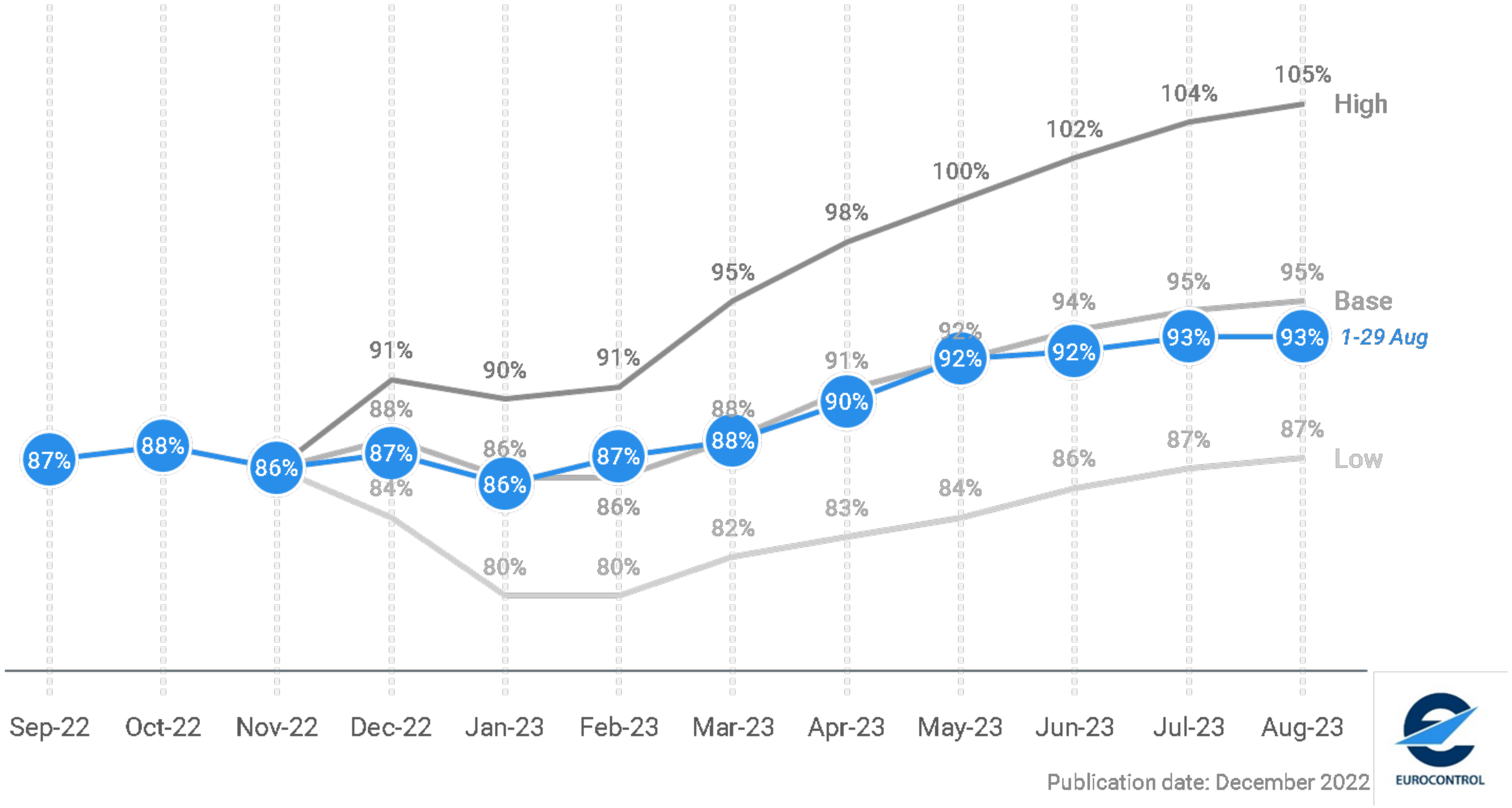
Average daily flights (including overflights)

Week 23-29 Aug 2023



Overall situation compared to the EUROCONTROL Traffic Scenarios

(base year 2019)



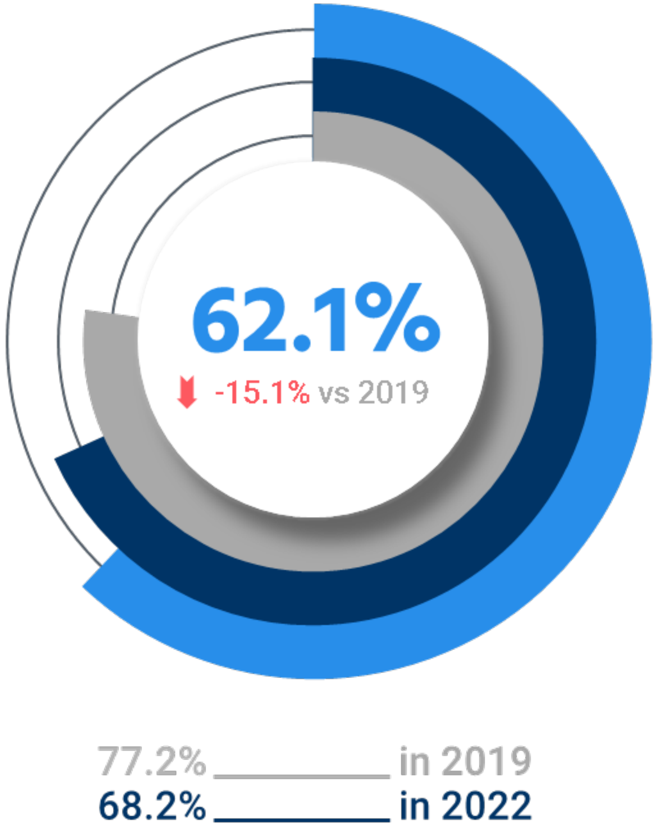
- The latest EUROCONTROL Traffic scenarios were published on 16 December 2022.
- Since that date, Network traffic has evolved largely in line with our Base scenario.
- For most of August, flights were at 93% of August 2019 levels, below our Base scenario (95%).
- On a year-to-date basis, Network traffic is at 91% of 2019, and +11% vs 2022.

Arrival & departure punctuality

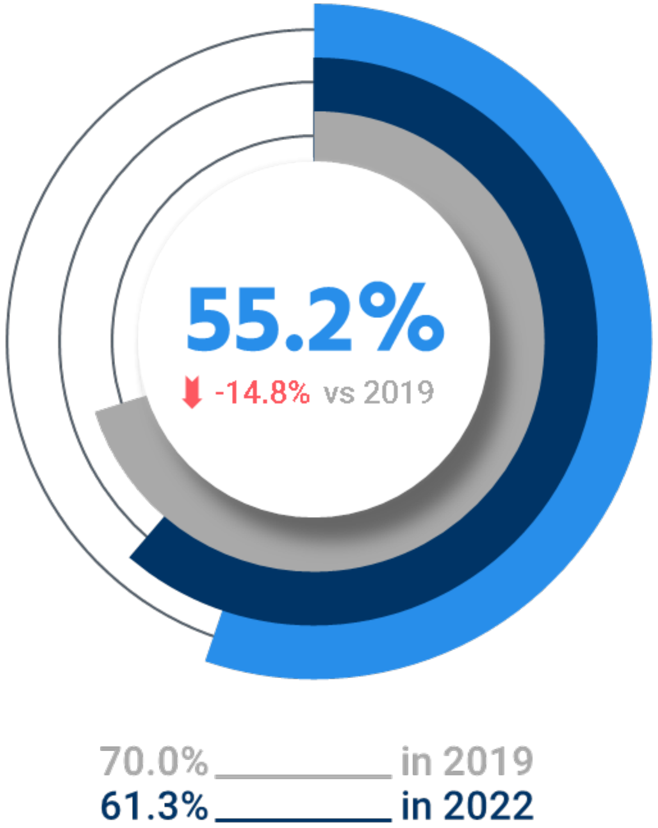
(at top airports for the last week)

Week 23-29 Aug 2023

ARRIVAL PUNCTUALITY



DEPARTURE PUNCTUALITY

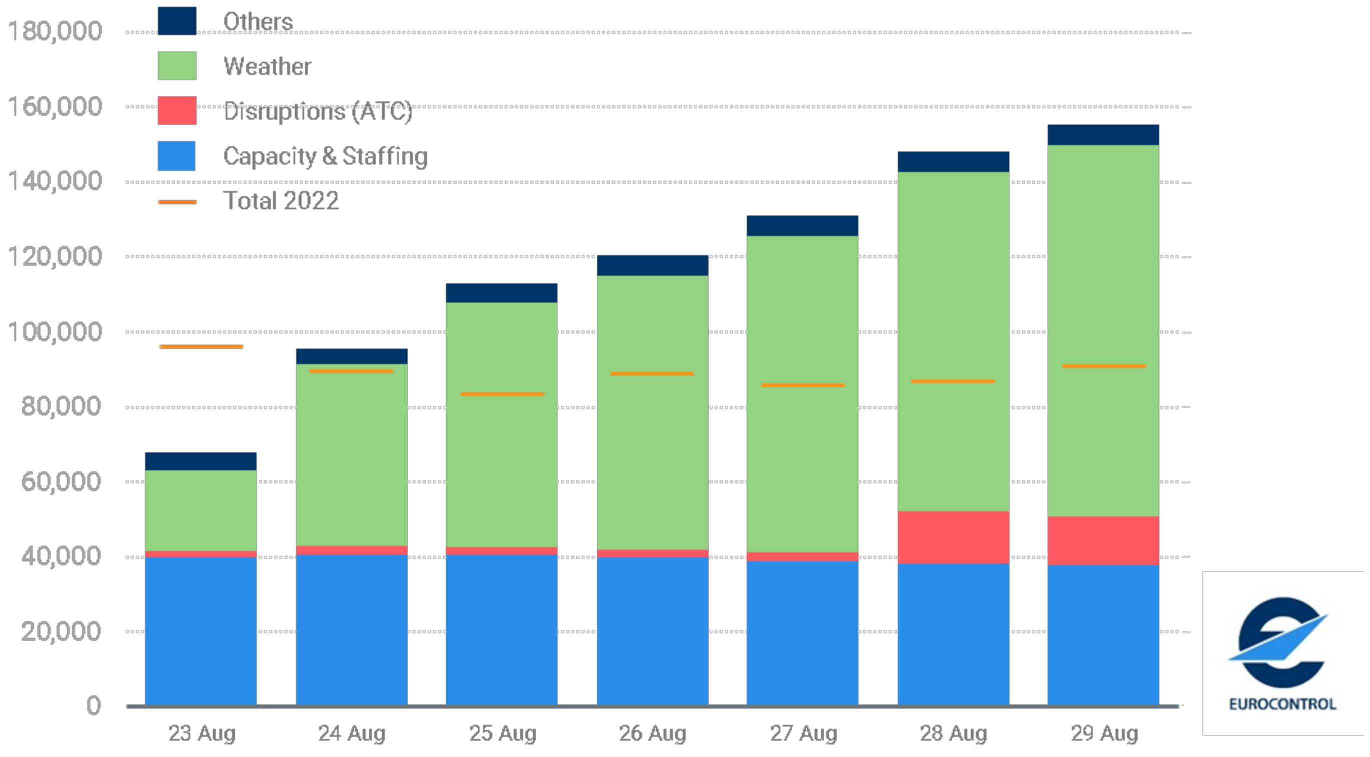


- Network punctuality was worse than in the equivalent week in 2019, with arrival punctuality at 62.1% and departure punctuality at 55.2%, decreasing by 15.1 and 14.8 percentage points respectively. This was also a deterioration, although smaller, compared to the same period in 2022.
- Seasonal weather had a strong impact over this period on the UK, Central Europe and the Balkan region; en-route weather regulations strongly affected punctuality on Saturday 26 August. The Balearic islands were heavily affected by a severe storm on Sunday 27 August.
- A technical issue affecting the NATS flight planning system on Monday 28 August caused very long ATFM delays and flight cancellations in the UK, Ireland and the Network. Flights affected by the long ATFM delays had a knock-on impact at various airports (especially at Greek islands) as a number of parking positions were blocked for several hours.

En-route ATFM delays

Delays per cause (EUROCONTROL Area)

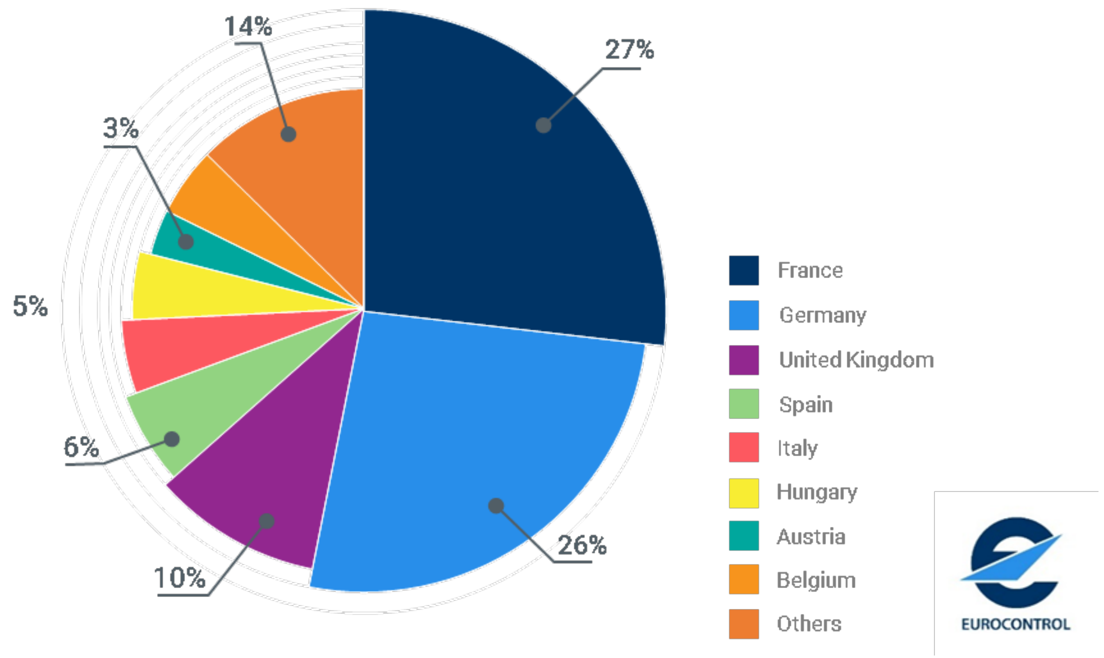
In minutes (7-day average) in 2023



- For the period 23-29 August, en-route ATFM delays were significantly higher than in 2022 (7-day average shown in graph).
- On average, they amounted to 155,000 minutes a day, with the main causes being weather (64%), then capacity & staffing (24%) as well as ATC disruption (8%, especially the technical issue affecting flights in UK airspace on Monday 28 August).

Share of en-route ATFM delays

Week 23-29 Aug 2023



- France accounted for 27% of all en-route ATFM delays, mainly concentrated in the Reims, Marseille and Paris ACCs.
- Germany came second with 26% of all en-route ATFM delays, mainly concentrated in the Karlsruhe and Munich ACCs.
- United Kingdom came third with 10% of all en-route ATFM delays (London ACC).

Top 10 States

Departures and arrivals

Week 23-29 Aug 2023

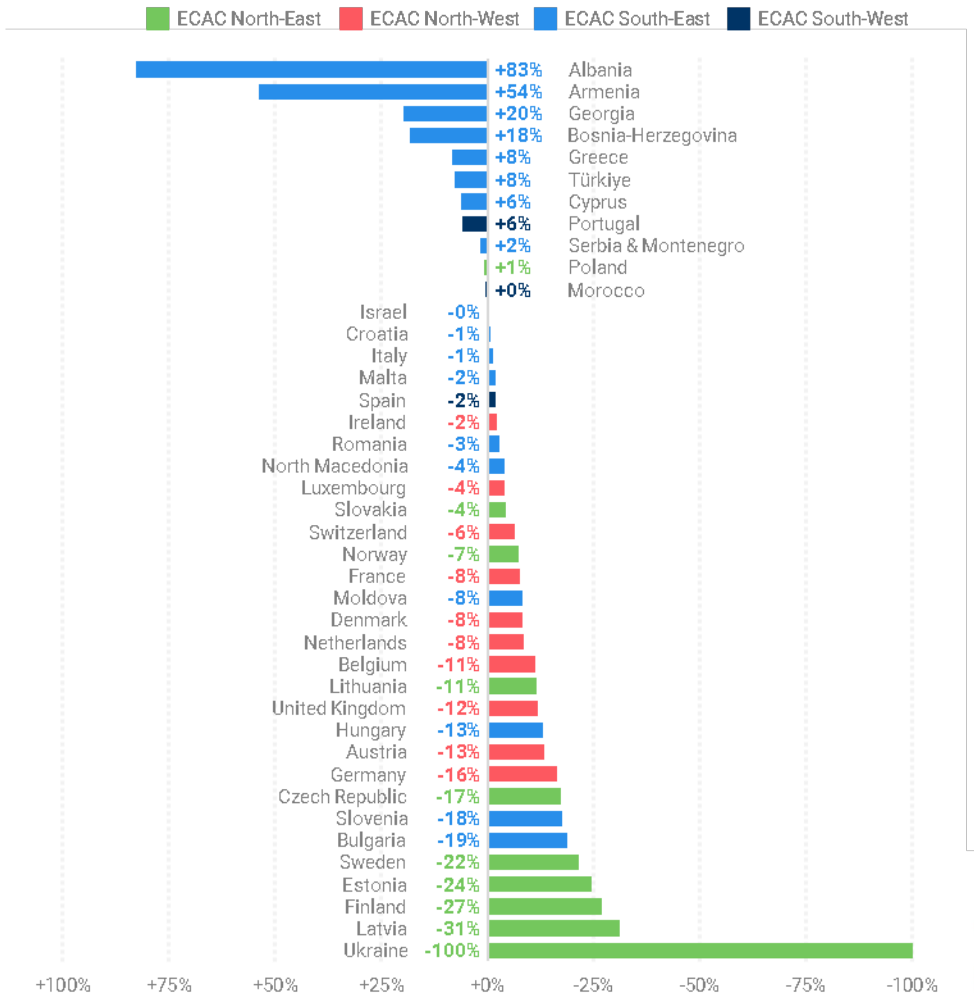
No.	Country	Average daily flights	% prev week	% prev year	% 2019
1.	United Kingdom	5,826	-3%	+3%	-12%
2.	Spain	5,405	-1%	+4%	-2%
3.	Germany	5,114	+0%	+3%	-16%
4.	France	4,554	+1%	+2%	-8%
5.	Italy	4,235	-1%	+5%	-1%
6.	Türkiye	3,924	-1%	+10%	+8%
7.	Greece	2,409	-2%	+3%	+8%
8.	Netherlands	1,668	-1%	+4%	-8%
9.	Norway	1,424	+2%	-5%	-7%
10.	Portugal	1,420	-1%	+10%	+6%

- The top 10 States recorded a lower number of flights compared to the previous week (-0.9%).
- Compared to the previous edition: Portugal and Norway swapped places.
- The United Kingdom recorded a 3% decline, owing to the technical issue affecting the NATS flight planning system, hence leading to cancellations of flights in the country.
- 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 7% below 2019 levels.

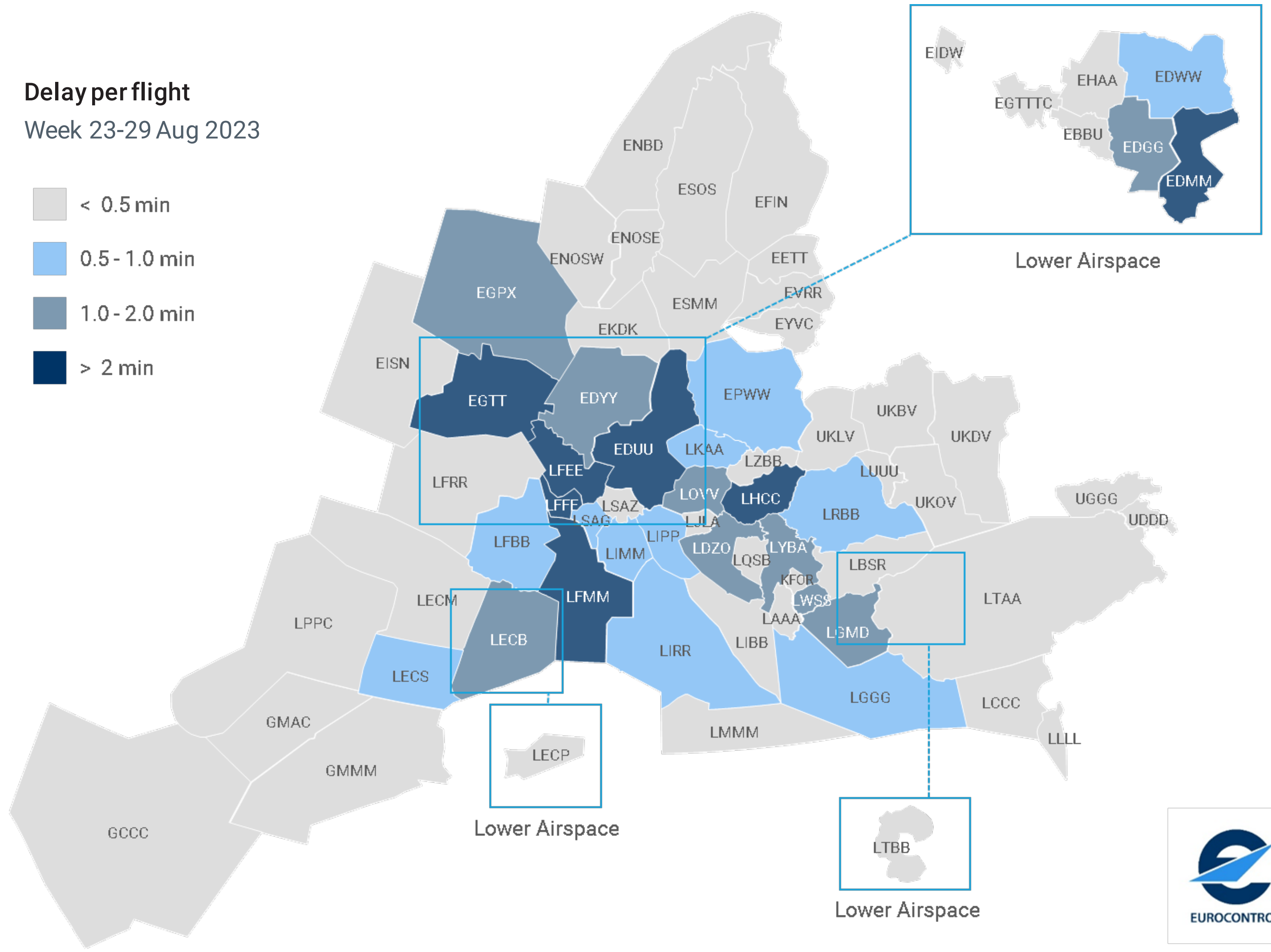
States in the EUROCONTROL Network

Compared to the equivalent week in 2019

Dep/Arr flights for week 23-29 Aug 2023



En-route ATFM delayed flights per Area Control Centre



- Over the last week, en-route ATFM delays have more than doubled compared to the week before and are above 2022 levels (155,000 minutes per day, on average).
- Compared to the same week in 2022, en-route ATFM delays were 70% higher this year.
- Last week, the most affected ACCs were:
  - Karlsruhe (4.8 min/flight), owing to ATC capacity, Airspace management and weather issues,
  - Reims (4.3 min/flight), Marseille (4.1 min/flight) and Paris (2.8 min/flight), owing to ongoing staffing issues and capacity issue,
  - Munich (2.2 min/flight), owing to system implementation and transition as well as weather issues,
  - London (2.1 min/flight), owing to weather and the major issue at NATS on 28 August, and,
  - Budapest (2.1 min/flight), due to military activity and weather issues.
- Overall, France was responsible for 27% of all en-route ATFM delays last week, followed by Germany (26%) and UK (10%).

Top 10 aircraft operators

Week 23-29 Aug 2023 (avg daily flights)

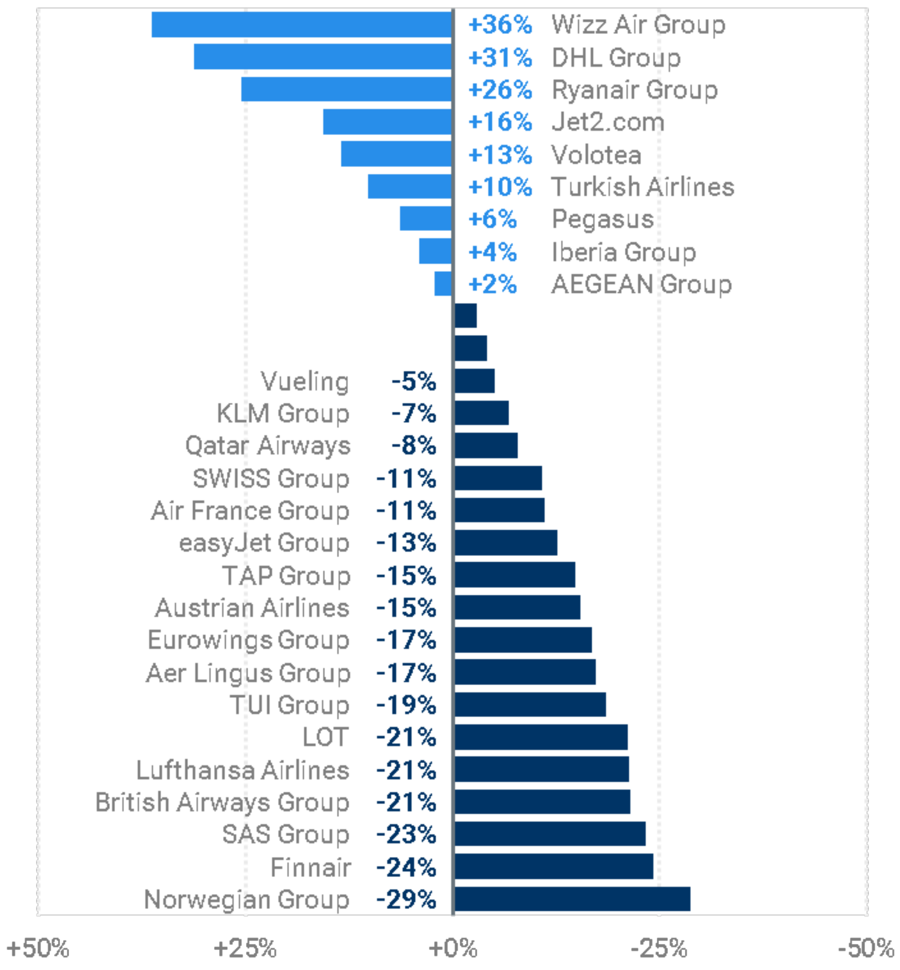
No.	Aircraft operator	Average daily flights	% prev week	% prev year	% 2019
1.	Ryanair Group	3,301	-2%	+10%	+26%
2.	easyJet Group	1,661	-8%	+2%	-13%
3.	Turkish Airlines	1,632	-0%	+13%	+10%
4.	Lufthansa Airlines	1,202	+1%	-0%	-21%
5.	Air France Group	1,084	+0%	-1%	-11%
6.	Wizz Air Group	935	-0%	+14%	+36%
7.	KLM Group	879	-2%	+11%	-7%
8.	British Airways Group	760	-8%	+7%	-21%
9.	Vueling	690	-2%	-4%	-5%
10.	SAS Group	680	+5%	+7%	-23%

- The top 10 aircraft operators posted a decrease in the number of flights (-2.1% on average) compared to the previous week.
- Last week, only two airlines/airline groups had more daily operations compared to the week before (Lufthansa and SAS).
- easyJet and British Airways were severely affected (-8% each) by the technical issue in UK airspace.
- Three airlines within the top 10 are flying well above their 2019 flight levels: +36% (Wizz Air Group), +26% (Ryanair Group) and +10% (Turkish Airlines).

Aircraft operators in the EUROCONTROL Network

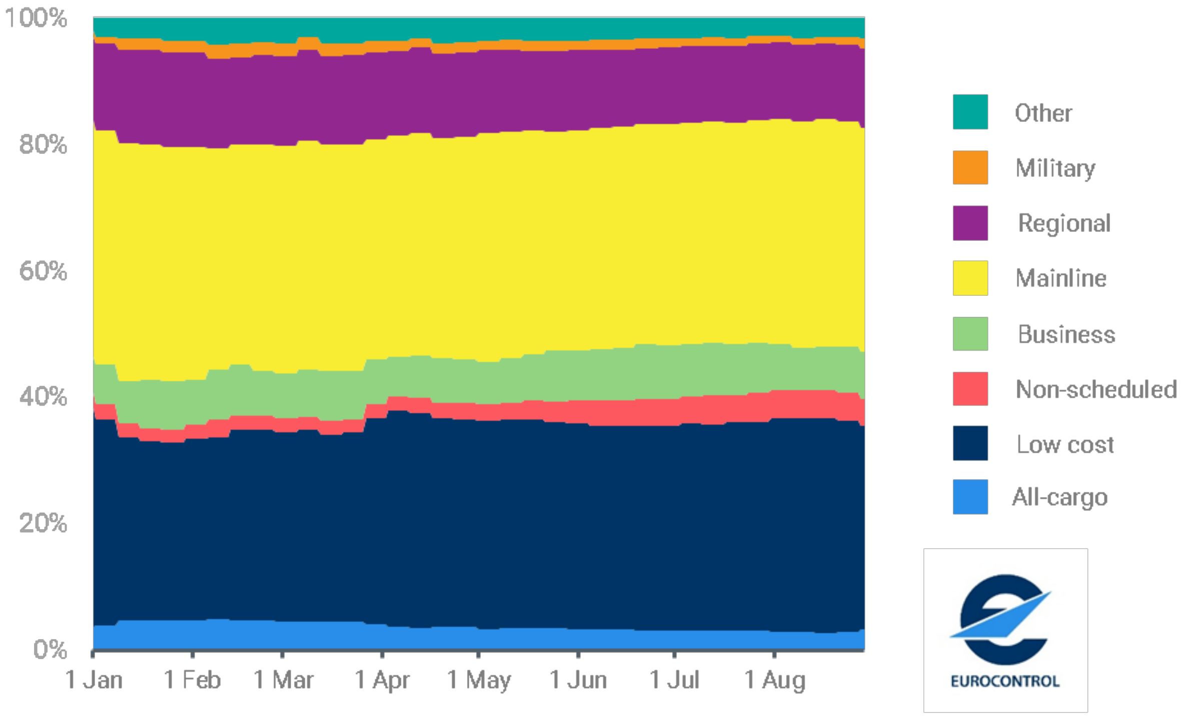
Compared to the equivalent week in 2019

Dep/Arr flights for week 23-29 Aug 2023

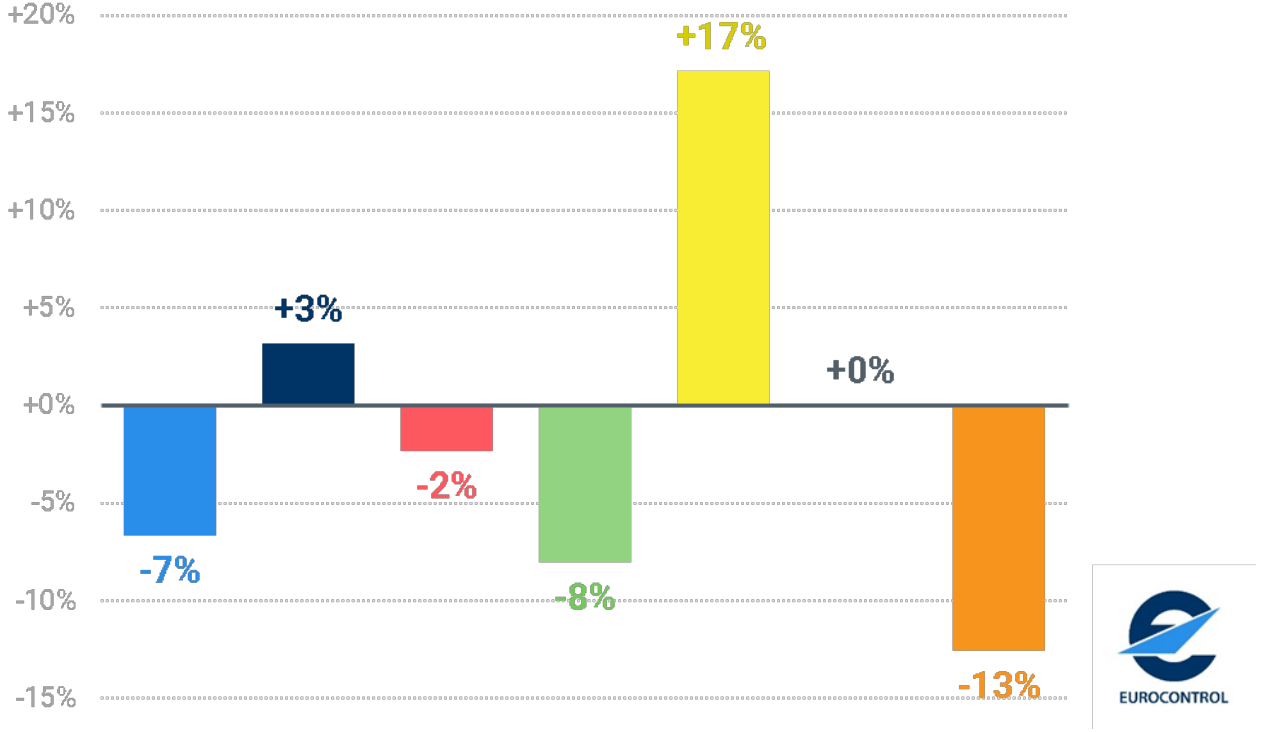


Market segments in the EUROCONTROL Network

7-day average share of total flights



Week 23-29 Aug 2023 (vs 2022)

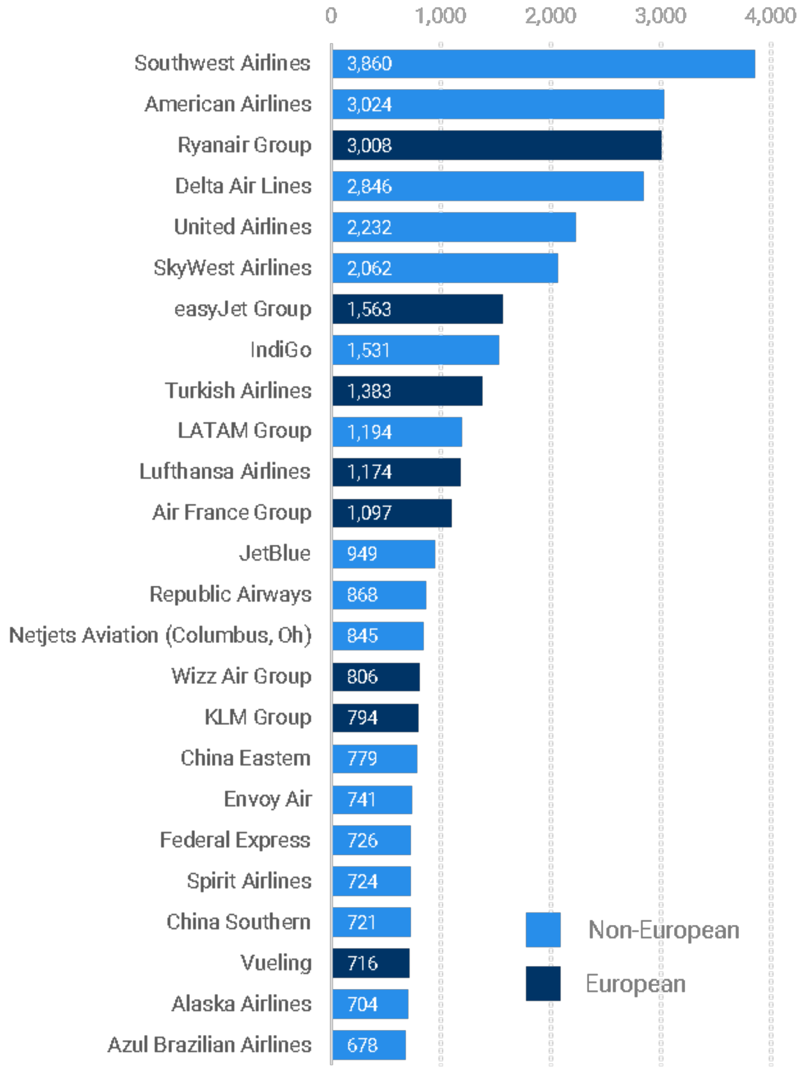


- Compared to 2022, the Mainline (+17%), Regional (0%), and Low-cost (+3%) sectors are recording growth since the pandemic.
- Business aviation (-8%) and All-cargo (-7%) are now recording fewer flights in 2023 compared to 2022 levels. The All-cargo market share has now stabilised (a market share of 3% of all flights for the period 1 - 29 August 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% of total flights for the period 1 - 29 August 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 the period 1 - 29 August 2023, recorded fewer flights (-2%) during the week 23 – 29 August 2023, compared to the same week in 2022.

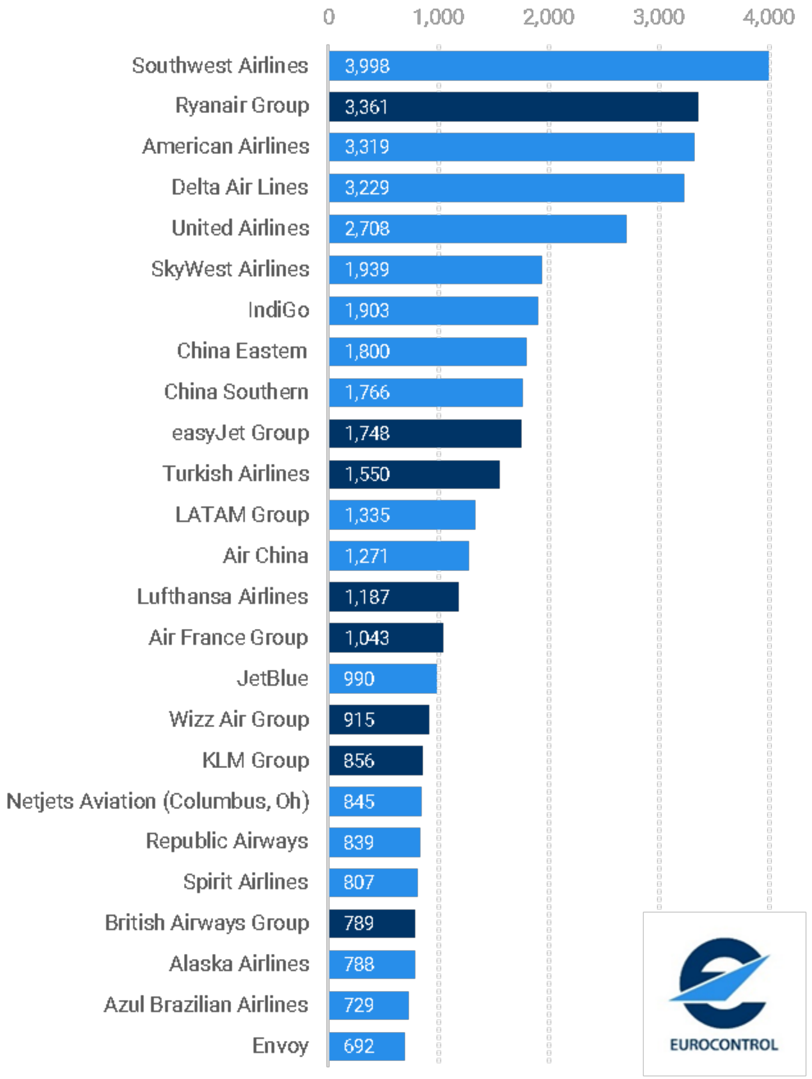
Top 25 global aircraft operators

(average daily departure flights)

7-day average (Week 21-27 Aug 2022)



7-day average (Week 21-27 Aug 2023)



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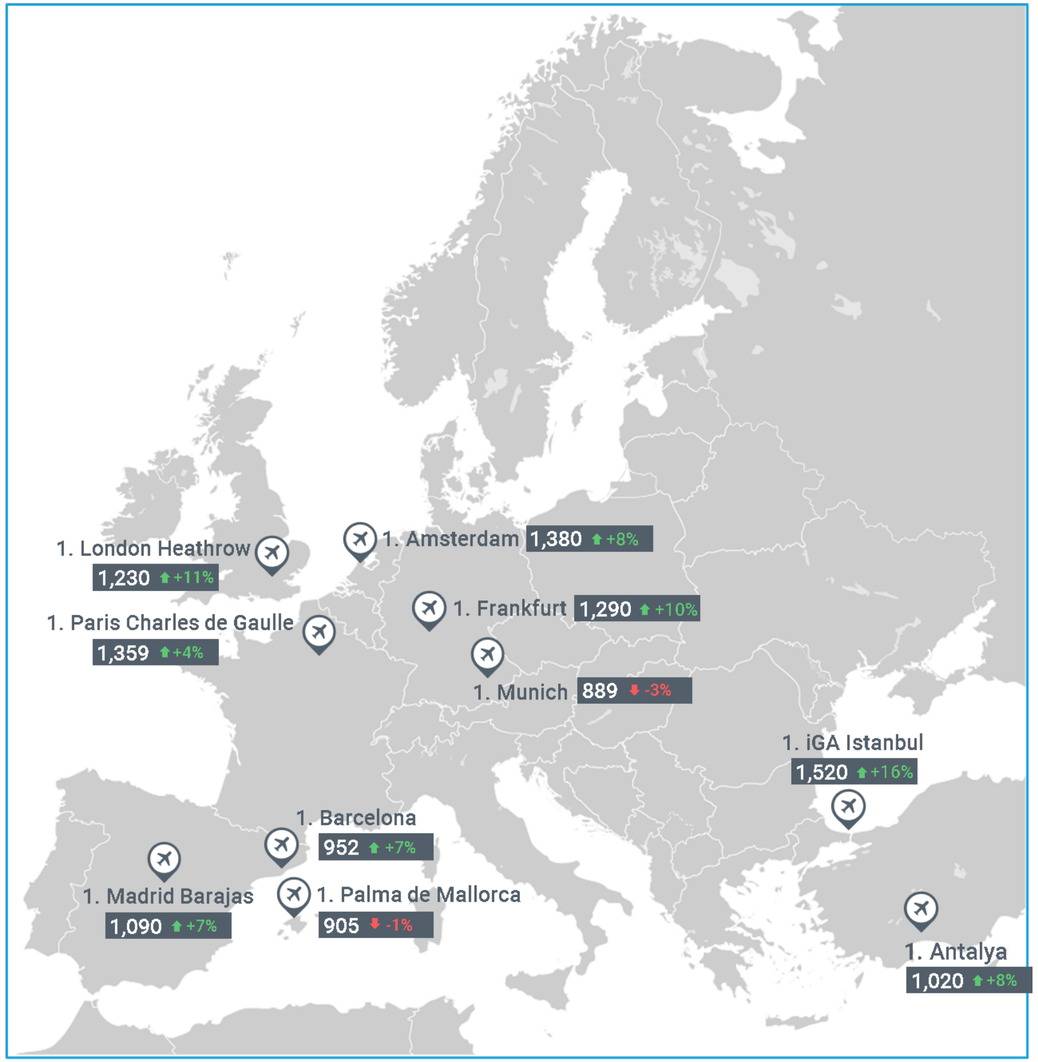
Source: Flightradar24 Historical Global Utilisation data

Over the last week:

- Eight European airlines are ranked in the top 25 global aircraft operators (as was the case in 2022).
- The first European aircraft operator is Ryanair – same rank as two weeks ago.
- The other European airline in the top 10 is easyJet (10th).
- Five more airlines make the top 20: Turkish Airlines (11th), Lufthansa (14th), Air France (15th), Wizz Air (17th) and KLM (18th).
- British Airways (22nd) is in the top 25 this year though they were not last year.
- Vueling is not in the top 25 this year though they were in 2022.

Top 10 airports



Airport ranking

Week 23-29 Aug 2023 (vs 2019)

No.	Airport	Avg. daily dep/arr flights	vs 2022	vs 2019
1.	iGA Istanbul	1,520	+16%	+19%
2.	Amsterdam	1,380	+8%	-8%
3.	Paris Charles de Gaulle	1,359	+4%	-12%
4.	Frankfurt	1,290	+10%	-15%
5.	London Heathrow	1,230	+11%	-10%
6.	Madrid Barajas	1,090	+7%	-9%
7.	Antalya	1,020	+8%	+7%
8.	Barcelona	952	+7%	-9%
9.	Palma de Mallorca	905	-1%	-1%
10.	Munich	889	-3%	-24%

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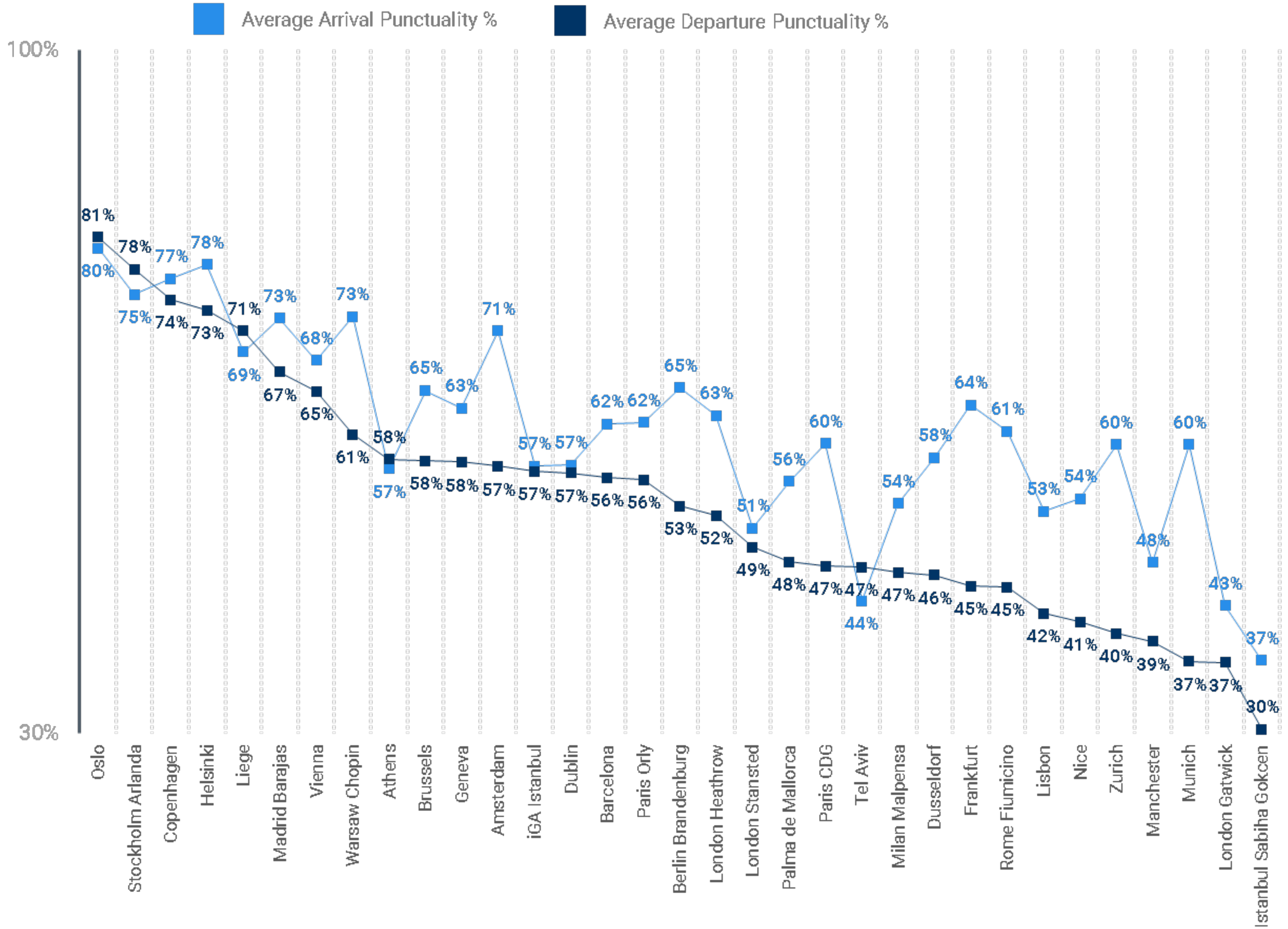
- Some changes in the ranking compared to the previous edition: Frankfurt and London Heathrow swap places.
- All but two airports experienced sustained growth vs 2022, ranging from +4% (Paris CDG) to +16% (iGA Istanbul).
- Two top 10 airports (iGA Istanbul and Antalya) are currently handling traffic above their 2019 levels.

Average arr/dep punctuality at main airports

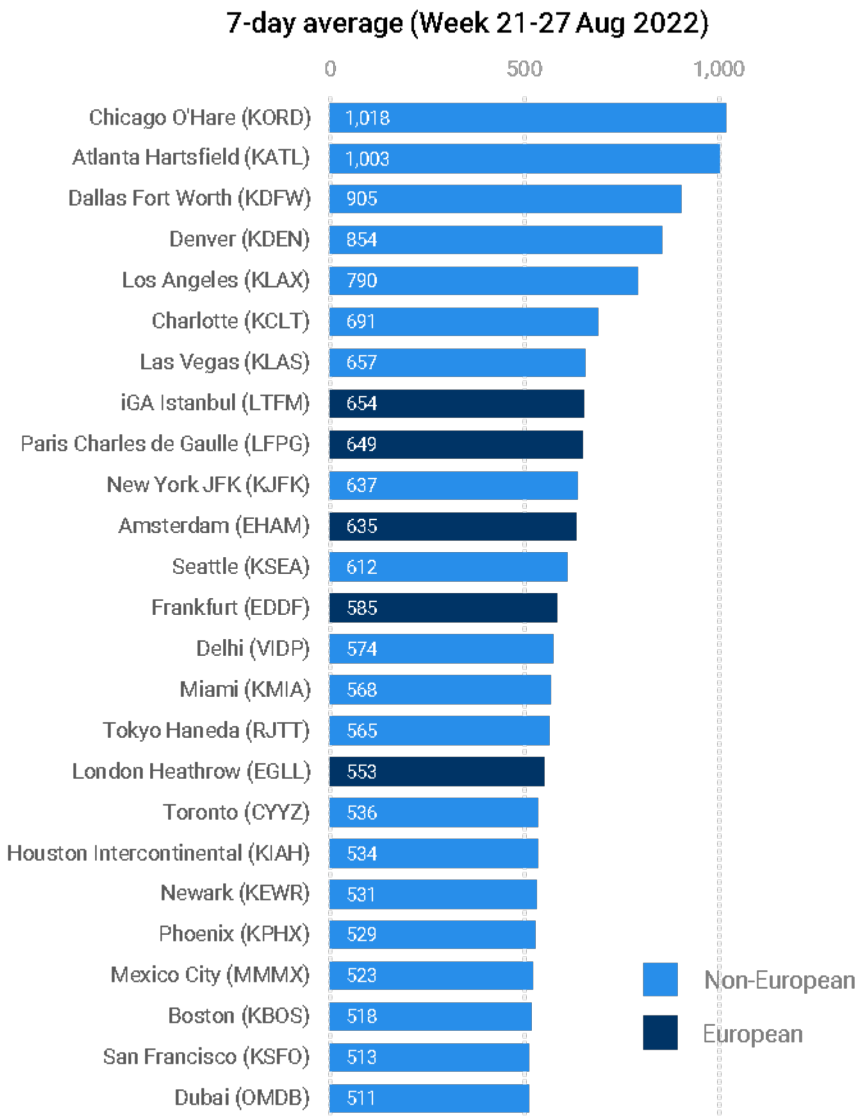
(Week 23-29 Aug 2023)

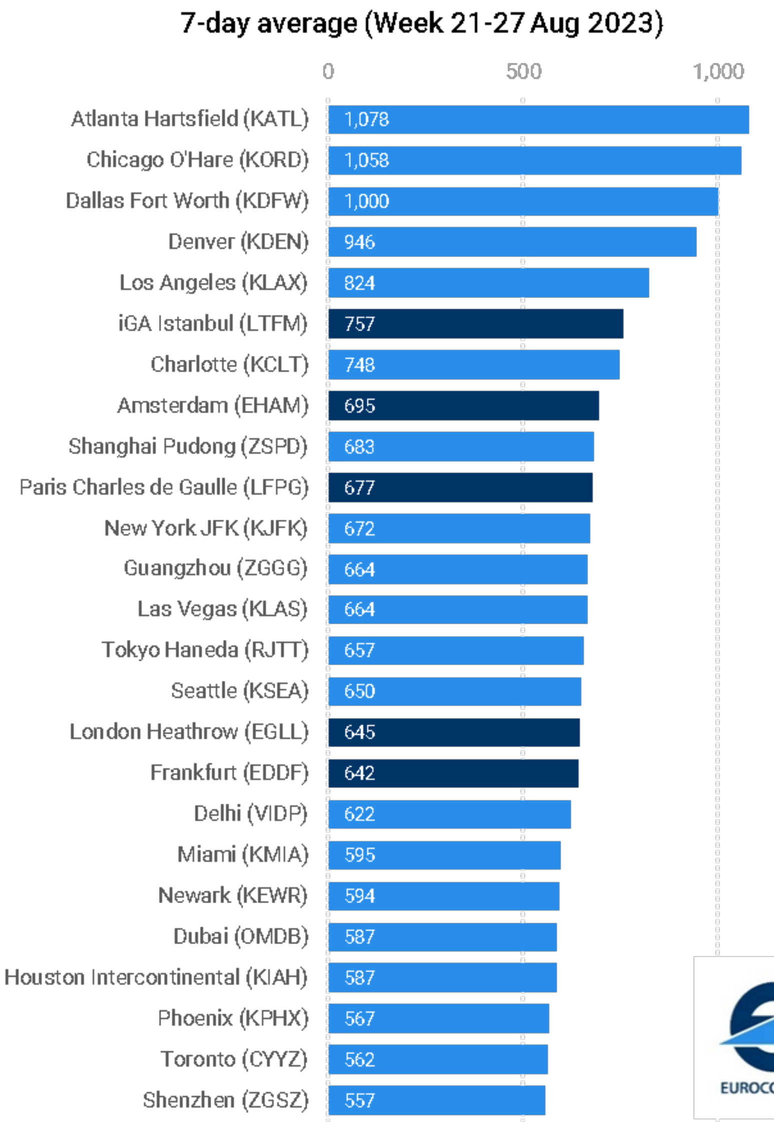


- After having deteriorated over the March-April period because of significant en-route ATFM delays related to industrial action in France, arrival and departure punctuality only marginally improved in May and June. July and August deteriorated again compared to 2019.
- Arrival punctuality is higher (i.e. better) than departure punctuality at most airports.
- However, a few airports (notably Oslo, Stockholm, Liège, Athens 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)





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Source: Flightradar24 Historical Global Utilisation data

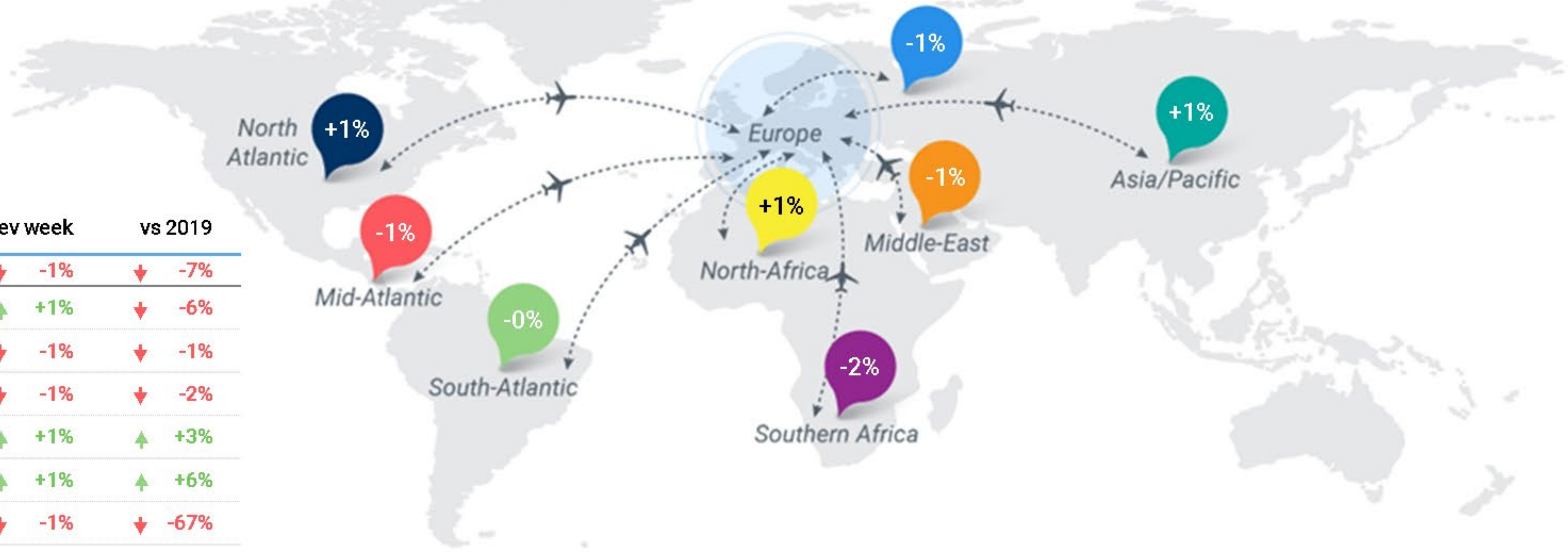
Over the last week

- Five 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 two places ahead of 2022.
- The other European airports in the top 20 are Amsterdam (8th), Paris CDG (10th), London Heathrow (16th), and Frankfurt (17th).
- The first Chinese airport to make the 2023 list is Shanghai (9th), followed by Guangzhou (12th) and Shenzhen (25th). None of them appeared in the top 25 a year ago.

Traffic flows

(average daily departure/arrival flights for week 23-29 Aug 2023)

Region	Average daily flights	vs prev week	vs 2019
Intra-Europe	25,197	-1%	-7%
Europe ↔ Asia/Pacific	785	+1%	-6%
Europe ↔ Mid-Atlantic	173	-1%	-1%
Europe ↔ Middle-East	1,740	-1%	-2%
Europe ↔ North Atlantic	1,469	+1%	+3%
Europe ↔ North-Africa	1,347	+1%	+6%
Europe ↔ Other Europe	444	-1%	-67%
Europe ↔ South-Atlantic	177	-0%	-10%
Europe ↔ Southern Africa	287	-2%	-9%
Non Intra-Europe	6,421	+0%	-13%



- The main traffic flow was intra-European with 25,197 daily flights last week, fewer (-1%) than the previous week. Intercontinental flows recorded 6,421 daily flights on average last week, in line with the previous week.
- The second-largest regional flow is between Europe and the Middle East: 1,740 average daily flights last week represented a decrease of 1% vs the previous week.
- The third flow is to/from North America with 1,469 daily flights, slightly increased (+1%) vs the previous week's value.
- The fourth flow is to/from North Africa, with 1,347 flights per day, slightly increased (+1%) vs the previous week's value.
- Flows with Other Europe (including the Russian Federation) remain massively reduced at -67% compared to 2019.
- Flows between Europe and Asia/Pacific have now largely recovered, to only -6% compared to 2019.

Top 10 long-haul country pairs

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

Week 23-29 Aug 2023

No.	Country pair	Average daily flights	% prev week	% prev year	% 2019
1.	UK ↔ US	320	-0%	+16%	+2%
2.	Germany ↔ US	170	-1%	+4%	+2%
3.	France ↔ US	137	-1%	+17%	+5%
4.	Italy ↔ US	96	-0%	+22%	+11%
5.	Ireland ↔ US	81	+8%	+19%	+13%
6.	Netherlands ↔ US	78	+1%	-2%	-10%
7.	Spain ↔ US	71	-1%	+4%	-10%
8.	UAE ↔ UK	59	+3%	+15%	-14%
9.	Canada ↔ UK	50	+0%	+2%	-10%
10.	Canada ↔ France	48	+1%	+21%	+15%

- Since the last edition, Ireland ↔ US and Netherlands ↔ US have swapped places in the long-haul country pairs rankings.
- Half of the flows posted an increase vs the previous week (ranging from +0% 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 one flow posted an increase on the same week in 2022.
- Six flows are currently above 2019 levels (UK ↔ US, Germany ↔ US, France ↔ US, Italy ↔ US, Ireland ↔ US and Canada ↔ France).

On average, jet fuel prices have jumped 17% in August compared to July and were at their highest since January 2023.

Higher jet fuel prices in August are partly due to soaring Chinese demand for jet fuel now above pre-COVID levels.

Economics

Week 23-29 Aug 2023

25 Aug 2023
avg fuel price:

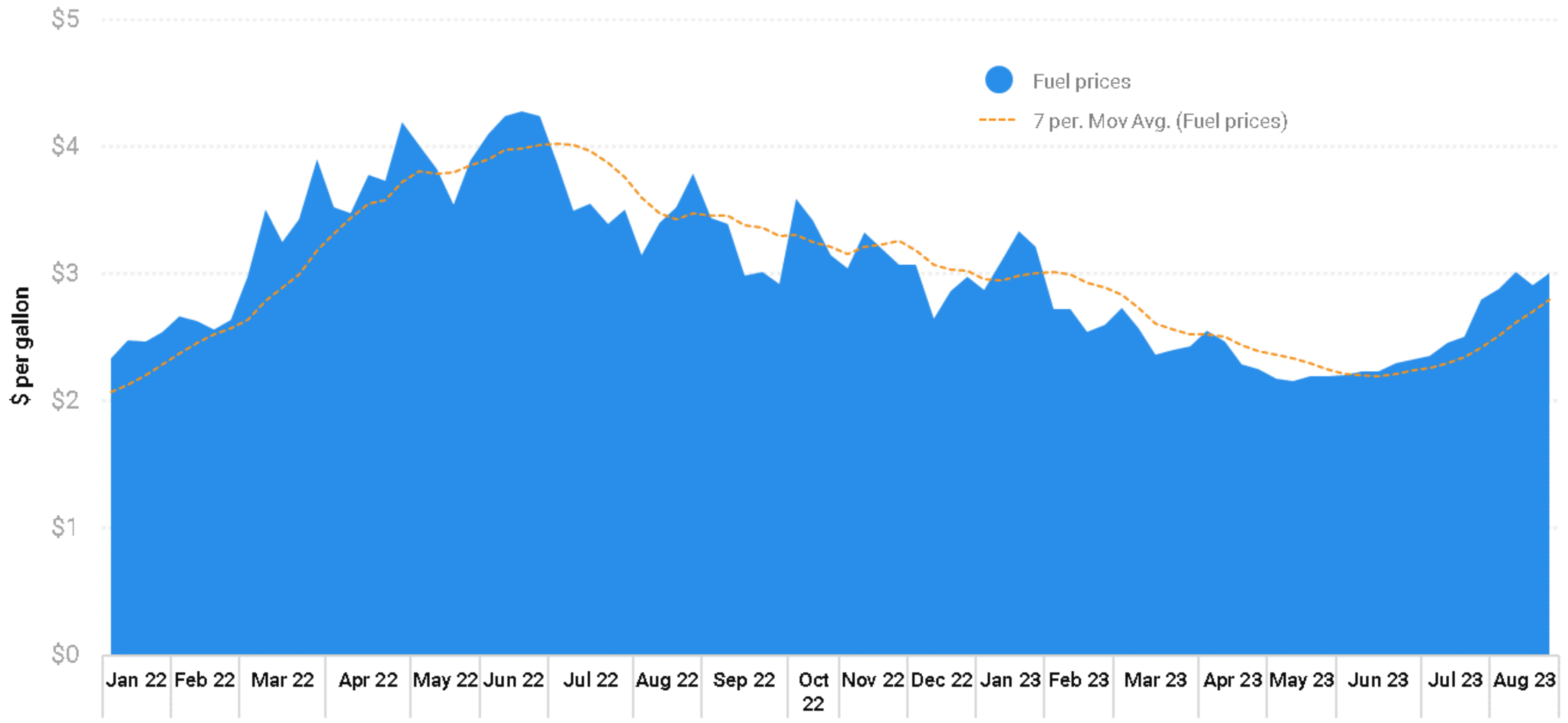
$3.00 /gallon

0%

vs. $3.01 /gallon
on 11 Aug 2023

Source: IATA/Platts

Jet fuel price (Europe)

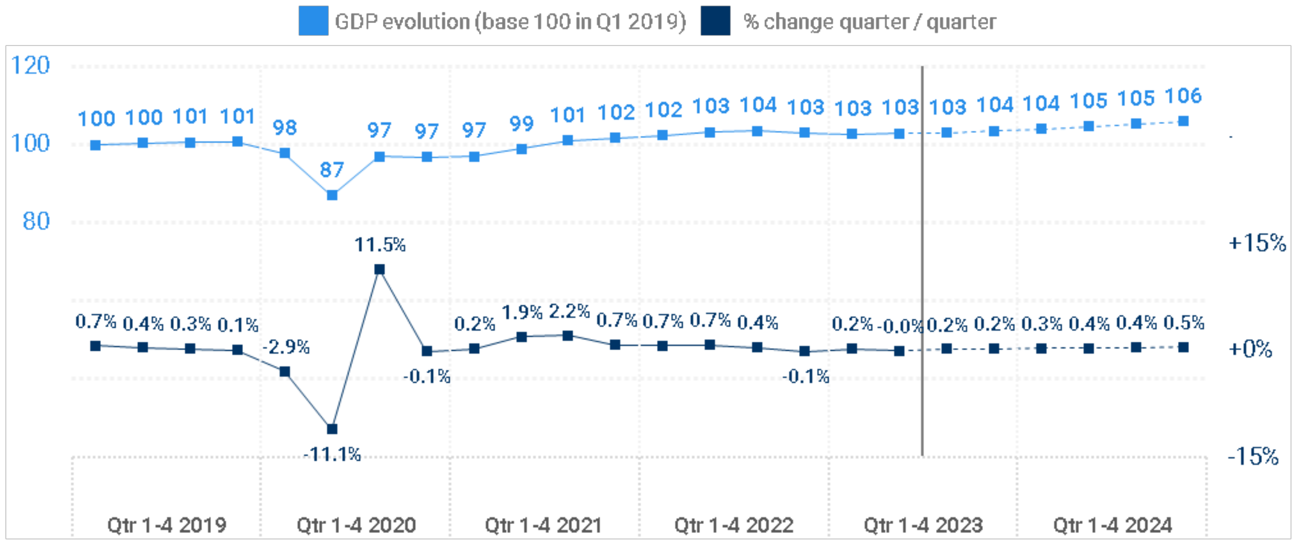


Source: IATA/Platts

- The average price of jet fuel was at 3.0 USD/gallon on 25 August 2023, stable compared to the last Overview, and 5% higher than the beginning of 2023.
- Based on a moving average trend, fuel prices in Europe had been mainly declining between June 2022 ($4/gallon) and June 2023 ($2.20/gallon).
- However, jet fuel prices have now jumped 15% compared to end July and, on 25 August 2023, were at their highest since January 2023.
- Since June 2023, jet fuel prices have been on the rise again, after Saudi Arabia started to cut oil production by >1 million barrels/day. Higher jet fuel prices in August are partly due to soaring Chinese demand for jet fuel now above pre-COVID levels.

GDP in the European Union

Constant prices and exchange rate, Euro

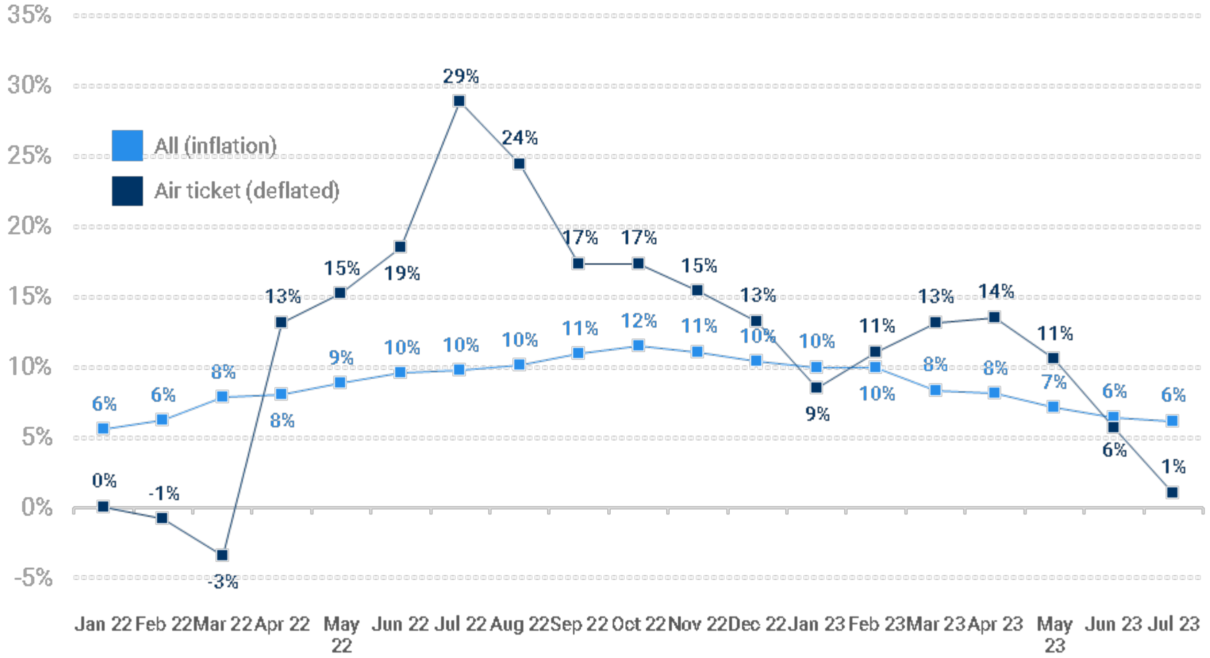


Source: Oxford Economics Ltd.

- Accordingto the latest GDP forecast from Oxford Economics, EU27 economies grew in 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



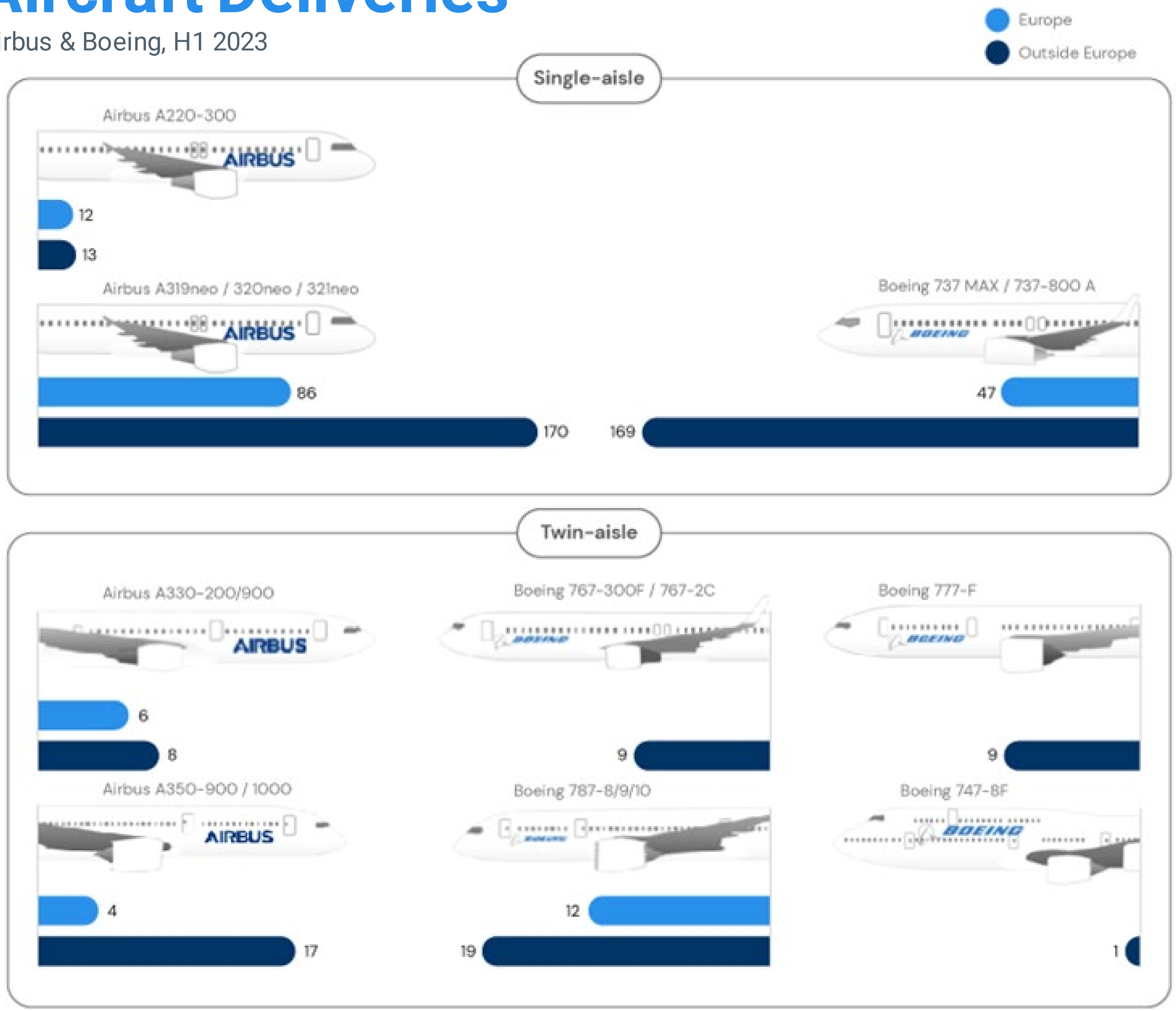
Source: EUROSTAT

The latest information from EUROSTAT shows the following:

- In July 2023, all-prices inflation stood at 6%; ticket prices increased by (only) 1% above inflation.
- This is the lowest increase of air ticket prices since March 2022.
- The increase in air ticket prices in July 2023 is limited because the prices had surged in July 2022. Compared to June 2023, air ticket prices are 15% higher in July 2023.

Aircraft Deliveries

Airbus & Boeing, H1 2023



For the first half of 2023:

- Airbus comfortably out-performed Boeing in terms of orders and deliveries.
- In total, Airbus delivered 60 more aircraft (316, +19%) than Boeing (266).
- Narrow-bodies largely dominated the deliveries: Airbus 281 A220-A320neo family-types and Boeing 211 737 MAX.
- Airbus delivered 108 aircraft to the European market (33% of H1 2023 deliveries) vs 59 aircraft for Boeing (22%).
- Airbus gross orders hit 1,080 aircraft (of which 971 narrow-bodies, 90%), more than double Boeing's with 527 aircraft (366 737 MAX, 69%).

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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