AVIATION INTELLIGENCE+

EUROCONTROL

EUROPEAN AVIATION OVERVIEW

02-08 Oct 2023

Tuesday 09 October 2023

Headlines

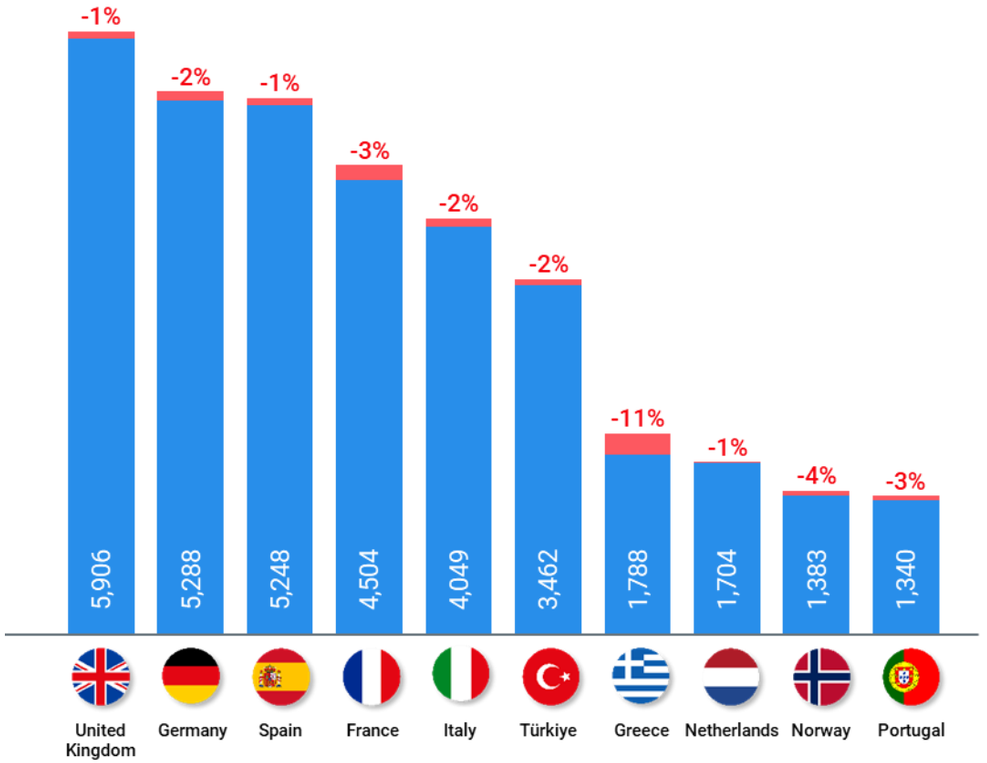
(Week 02-08 Oct 2023)

- The Network recorded 31,099 average daily flights (+8% vs 2022), 2.5% below the previous week and standing at 94% of 2019 levels.
- In September, the number of flights in the network was at 93% of 2019 levels. For the first eight days in October, the recovery level was 95%.
- The top 40 airports welcomed 133 million passengers in August 2023, 13% more than in August 2022.
- All but two of the top 10 carriers reduced capacity over the week.
- En-route ATFM delays averaged just above 40,000 minutes per day (1.3 min/flight), with the main causes being capacity & staffing (77%). The week registered the lowest delay since the second week of May 2023.
- Arrival and departure punctuality, at 74.5% and 68.8% respectively, were 4.2/5.1 percentage points below 2019 levels, and also lower than the equivalent week in 2022.
- The average jet fuel price stood at 2.93 USD/gallon on 06 October 2023, declining by 7% compared to two weeks ago. Current prices have increased by 2% compared to the beginning of the year.

Top 10 busiest States

On week 02-08 Oct 2023

(all flights incl. overflights compared with previous week)



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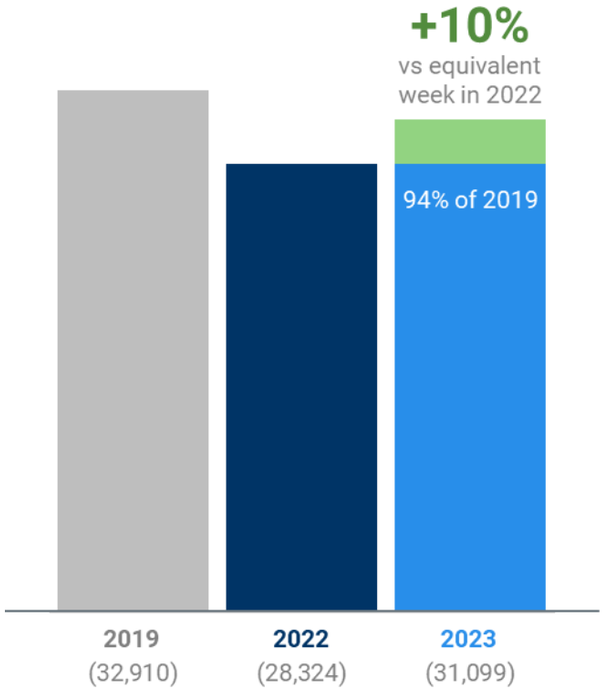
Traffic situation

Average daily flights (including overflights)

Week 02-08 Oct 2023



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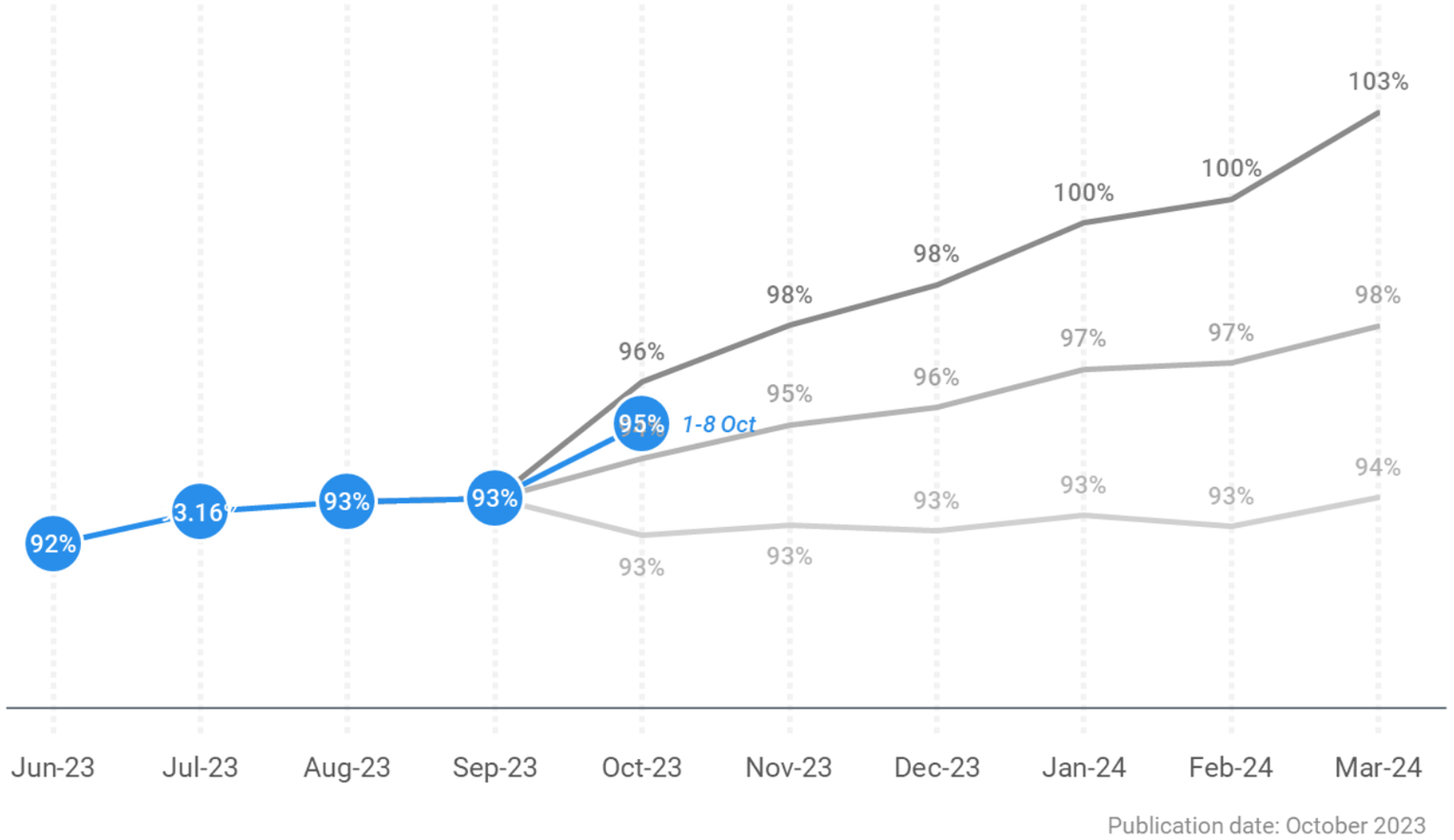
Overall situation compared to the EUROCONTROL Traffic Scenarios

(base year 2019)



Publication date: October 2023

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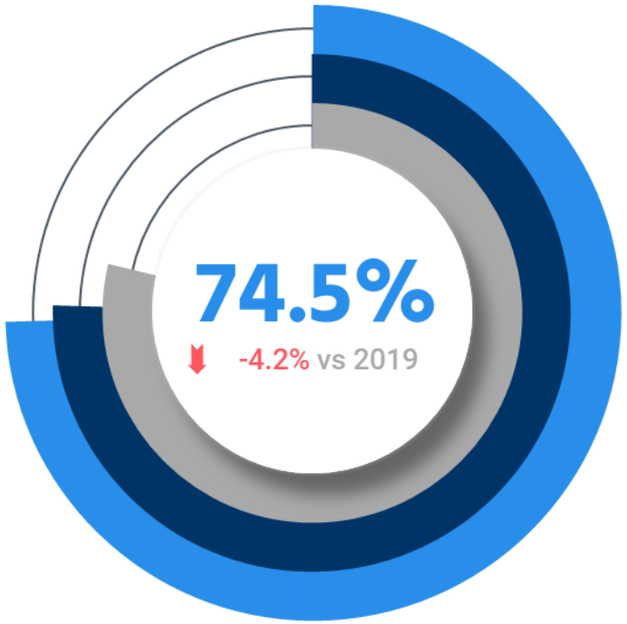
- The latest EUROCONTROL Monthly Traffic Forecasts for the period up to March 2024 predict continuing growth, reaching 98% of 2019 traffic in our Base Scenario by the end of the period.
- For September 2023, flights closed at 93% of September 2019 levels.
- The number of flights in the first eight days of October were 95% of those in the same period in 2019.
- 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 02-08 Oct 2023

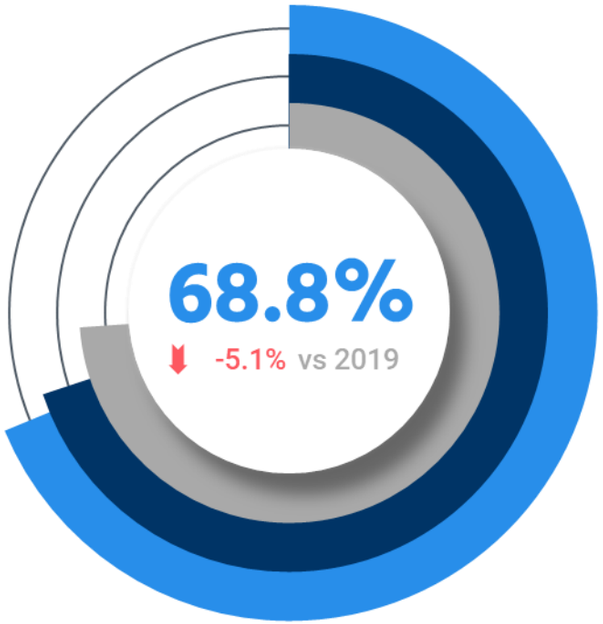
ARRIVAL PUNCTUALITY



78.7% in 2019

75.5% in 2022

DEPARTURE PUNCTUALITY



73.9% in 2019

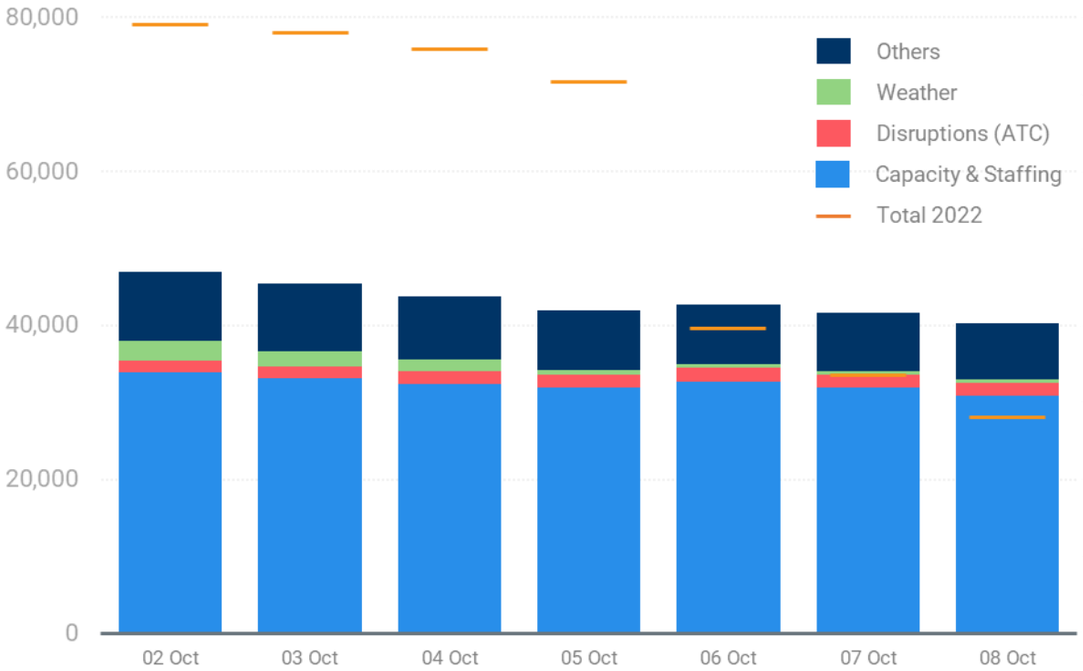
69.9% in 2022

- Network punctuality deteriorated when compared to the equivalent week in 2019. Arrival punctuality was down by 4.2 percentage points to 74.5% with departure punctuality falling by 5.1 points to 68.8%. However, compared to the equivalent week in 2022 this was an improvement.
- Seasonal weather (thunderstorms/convective activity and low visibility) influenced the network during the week. Regarding airports, aerodrome capacity and ATC staffing delays, with additional weather regulations (thunderstorm and CB activity) were observed at the Istanbul airports in the beginning of the week.
- There were ATFM delays at Antalya airport due to aerodrome capacity and a zero rate on 6 October owing to a power cable issue (resulting in 23 flight diversions). Lisbon continued to suffer from daily aerodrome capacity ATFM regulations alongside weather delays due to low visibility at the beginning of the week. London Heathrow was also affected by weather delays due to low visibility at the beginning of the week.

En-route ATFM delays

Delays per cause (EUROCONTROL Area)

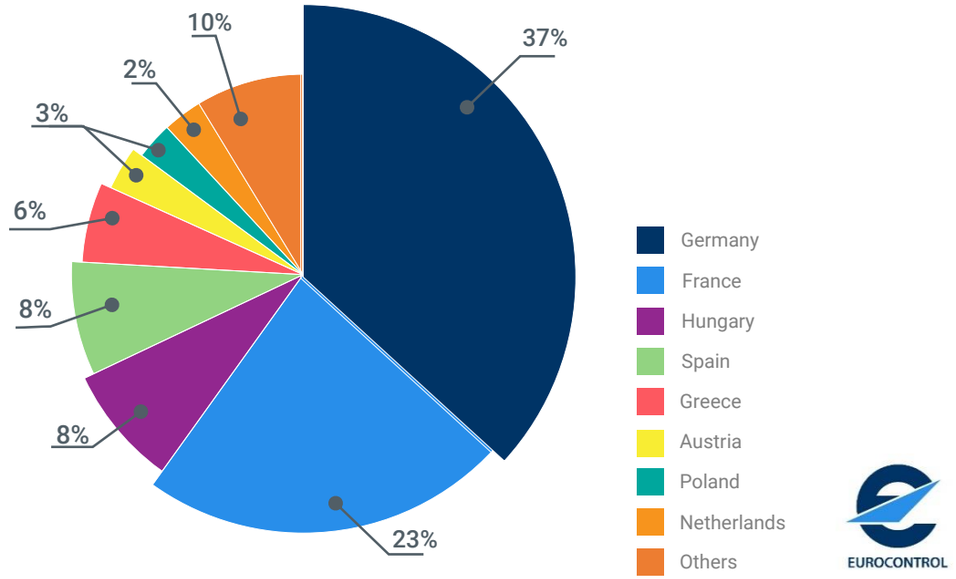
In minutes (7-day average) in 2023



- For the week of 02-08 October, en-route ATFM delays were above the 2022 levels (7-day average shown in graph).
- The 02-08 October 2023 week registered the lowest delay since the 07-13 May 2023 week.
- On average, en-route ATFM delays amounted to 40,324 minutes a day, with the main causes being capacity & staffing (77%).

Share of en-route ATFM delays

Week 02-08 Oct 2023



- Germany accounted for 37% of all en-route ATFM delays, mainly concentrated in the Karlsruhe, Munich and Bremen ACCs.
- France came second with 23% of all en-route ATFM delays, mainly concentrated in the Reims and Marseille ACCs.
- Hungary came third with 8% of all en-route ATFM delays.

Top 10 States

Departures and arrivals

Week 02-08 Oct 2023

No.	Country	Average daily flights	% prev week	% prev year	% 2019
1.	United Kingdom	5,906	-1%	+10%	-7%
2.	Germany	5,288	-2%	+7%	-15%
3.	Spain	5,248	-1%	+9%	+1%
4.	France	4,504	-3%	+10%	-2%
5.	Italy	4,049	-2%	+11%	+4%
6.	Türkiye	3,462	-2%	+15%	+7%
7.	Greece	1,788	-11%	+13%	+8%
8.	Netherlands	1,704	-1%	+7%	-7%
9.	Norway	1,383	-4%	-2%	-9%
10.	Portugal	1,340	-3%	+9%	+10%

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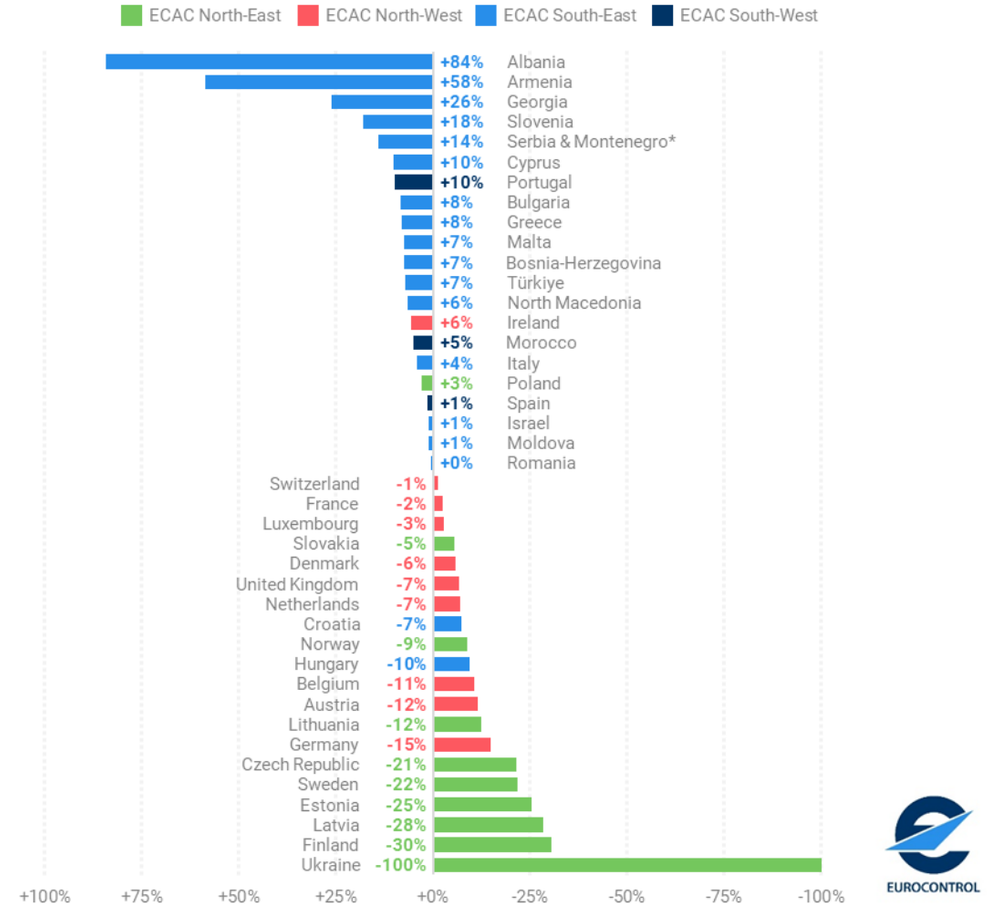
- The top 10 States, in aggregate, recorded fewer flights compared to the previous week (-2.4%).
- Compared to the previous edition: no change in the rankings.
- All States recorded fewer flights compared to the previous week: Greece dropped by 11%, especially as a result of a reduction in domestic flows and flows from/to UK, Italy and Czech Republic.
- Five States within the top 10 are now recording traffic in line with or above 2019 (Portugal, Greece, Türkiye, Italy and Spain). The five remaining States are still between 15% and 2% below pre-COVID levels.

States in the EUROCONTROL Network

Compared to the equivalent week in 2019

Dep/Arr flights for week 02-08 Oct 2023



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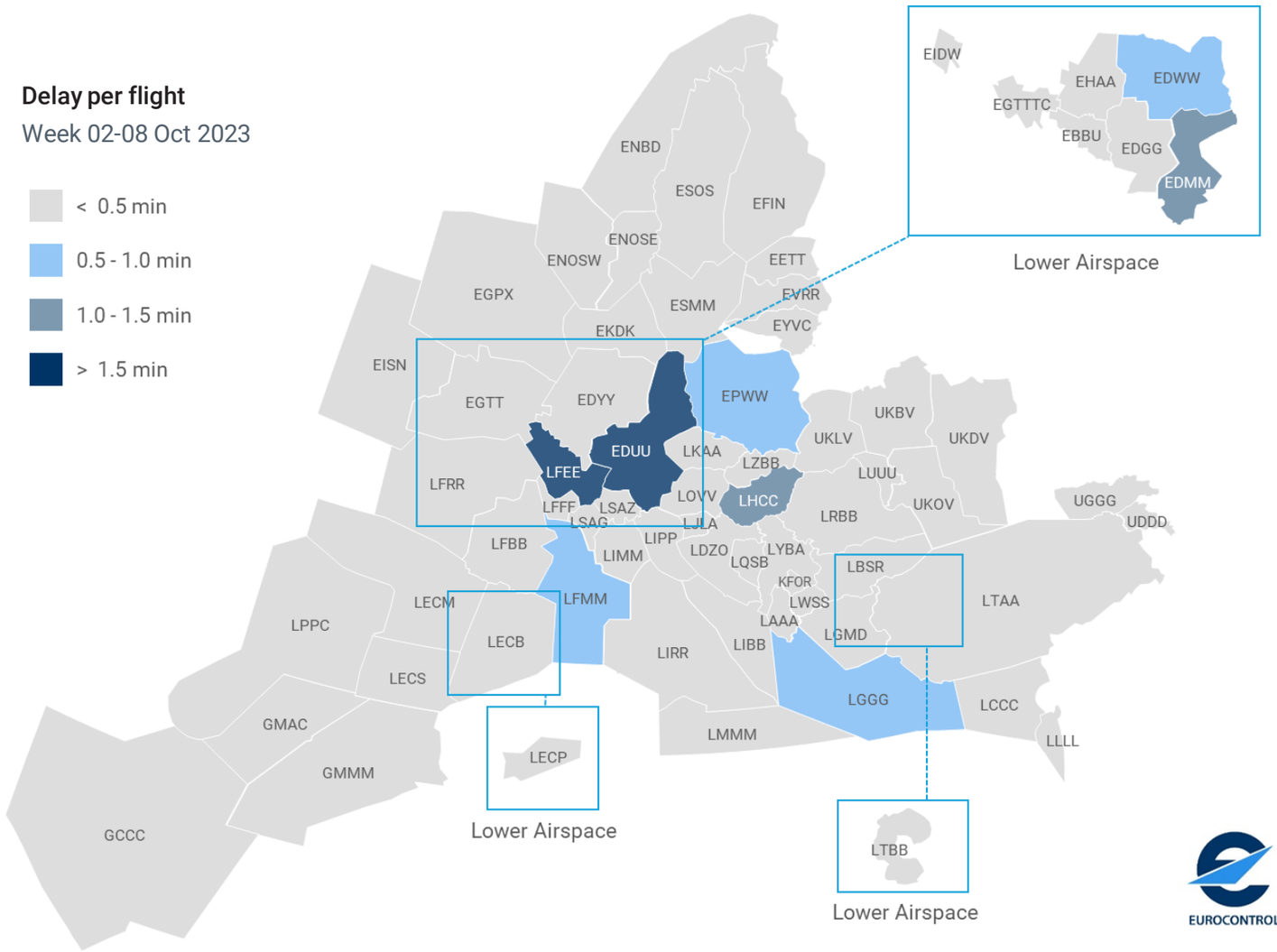
**Based on integrated ANSP*

En-route ATFM delayed flights per Area Control Centre



- Over the last week, en-route ATFM delays have decreased by 14% compared to the week before but are above 2022 levels (40,324 minutes per day, on average).
- Compared to the same week in 2022, en-route ATFM delays were 43% higher.
- There were no ACCs above 2 min/flight in over the last week.
- Last week, the most affected ACCs were:
  - Karlsruhe (1.7 min/flight), owing to ATC capacity and airspace management,
  - Reims (1.7 min/flight) owing to ATC capacity and staffing issues,
  - Munich (1.2 min/flight), due to system implementation and transition as well as staffing issues,
  - Budapest (1.0 min/flight), owing to capacity issues.
- Overall, Germany was responsible for 37% of all en-route ATFM delays last week, followed by France (23%) and Hungary (8%).

Top 10 aircraft operators

Week 02-08 Oct 2023 (avg daily flights)

No.	Aircraft operator	Average daily flights	% prev week	% prev year	% 2019
1.	Ryanair Group	3,205	-2%	+10%	+26%
2.	easyJet Group	1,726	-1%	+7%	-7%
3.	Turkish Airlines	1,508	-2%	+16%	+8%
4.	Lufthansa Airlines	1,313	+3%	+10%	-16%
5.	Air France Group	1,059	-0%	+5%	-14%
6.	KLM Group	907	-0%	+15%	-5%
7.	Wizz Air Group	861	-0%	+13%	+32%
8.	British Airways Group	816	-2%	+14%	-13%
9.	SAS Group	676	-7%	+7%	-26%
10.	Vueling	641	+1%	-1%	-5%

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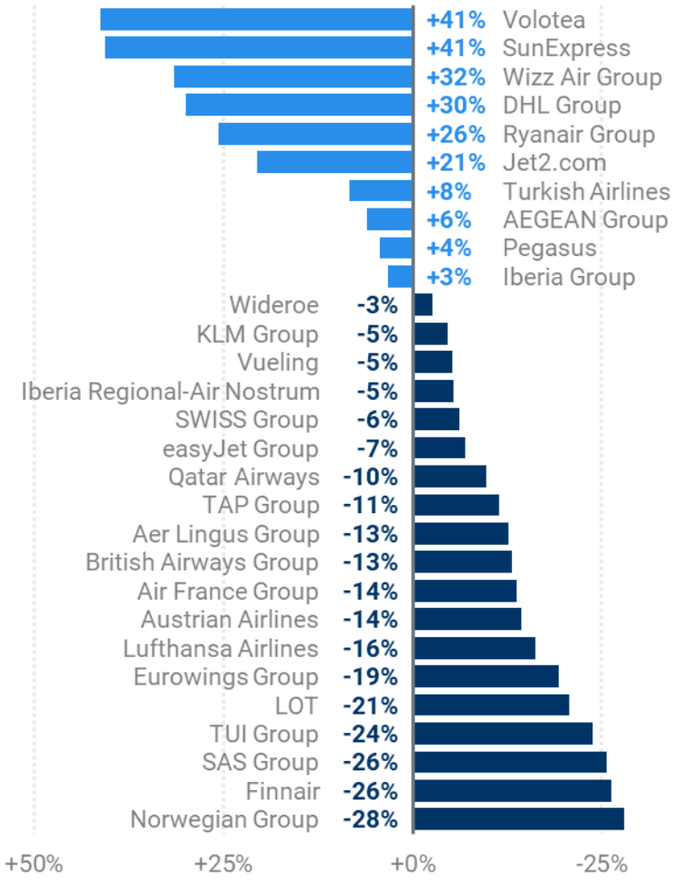
- The top 10 aircraft operators posted a slight decrease in the number of flights (-2.5% on average) compared to the previous week.
- Only two airlines/airline groups had similar or more daily operations compared to the week before. Lufthansa was mainly adding flights on the domestic flows and the flows from/to Italy. Vueling was mainly adding flights on the flows from/to France and Italy.
- SAS Group posted a 7% decrease, caused mainly by a decrease in domestic flows in Norway and on flows Denmark ↔ Sweden.
- Last week, three airlines within the top 10 had flight numbers well above 2019 levels: +32% (Wizz Air Group), +26% (Ryanair Group), +8% (Turkish Airlines).

Aircraft operators in the EUROCONTROL Network

Compared to the equivalent week in 2019
Dep/Arr flights for week 02-08 Oct 2023



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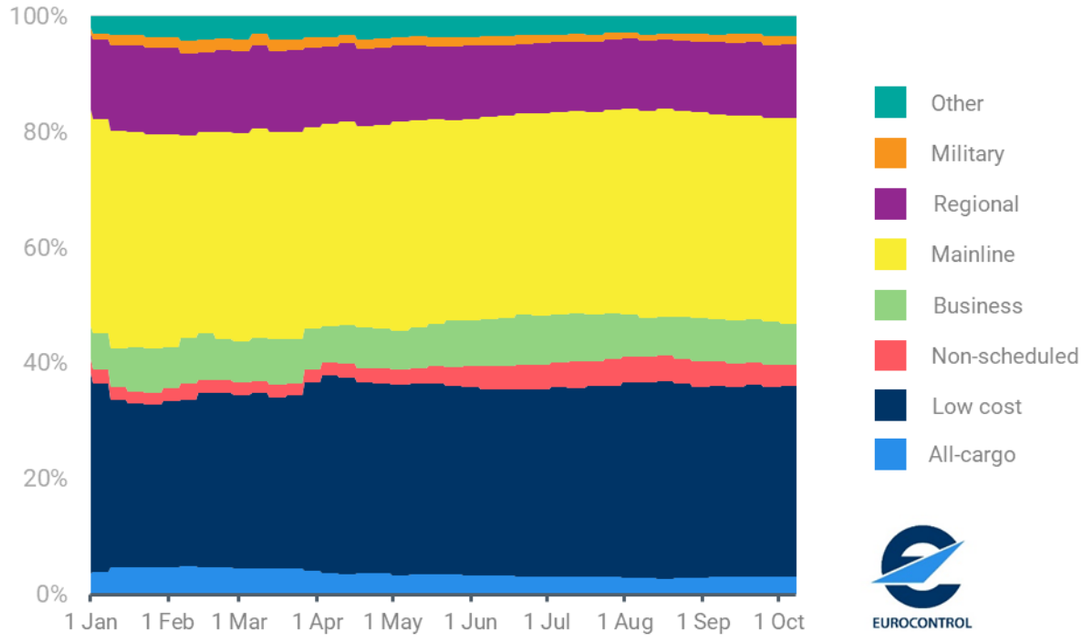
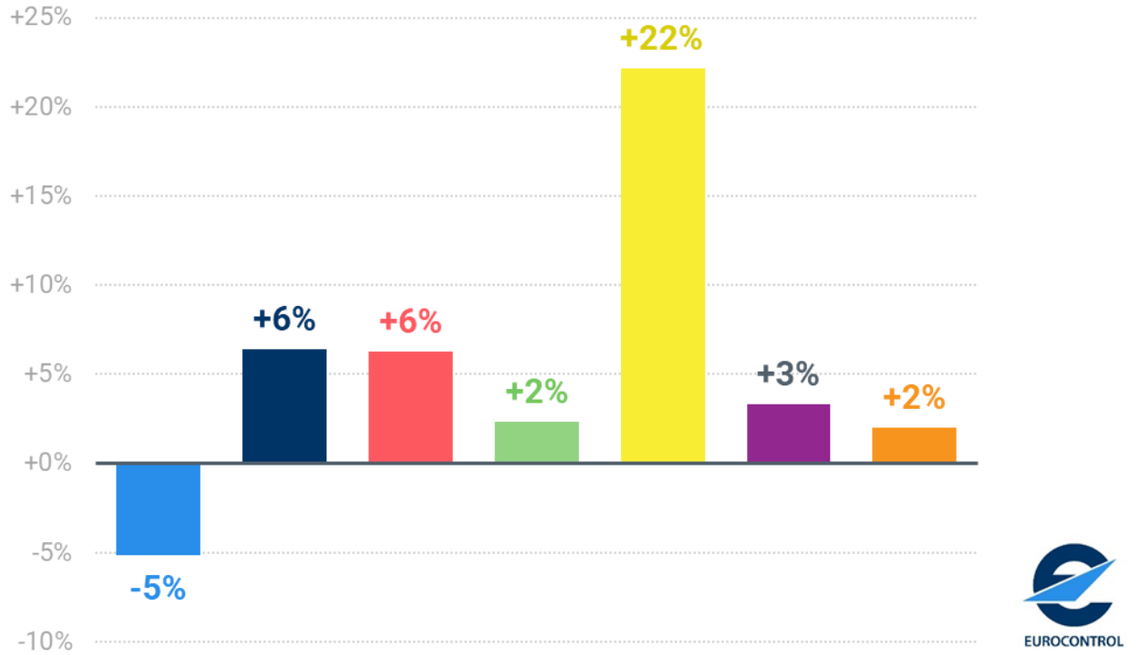
Market segments in the EUROCONTROL Network

7-day average share of total flights



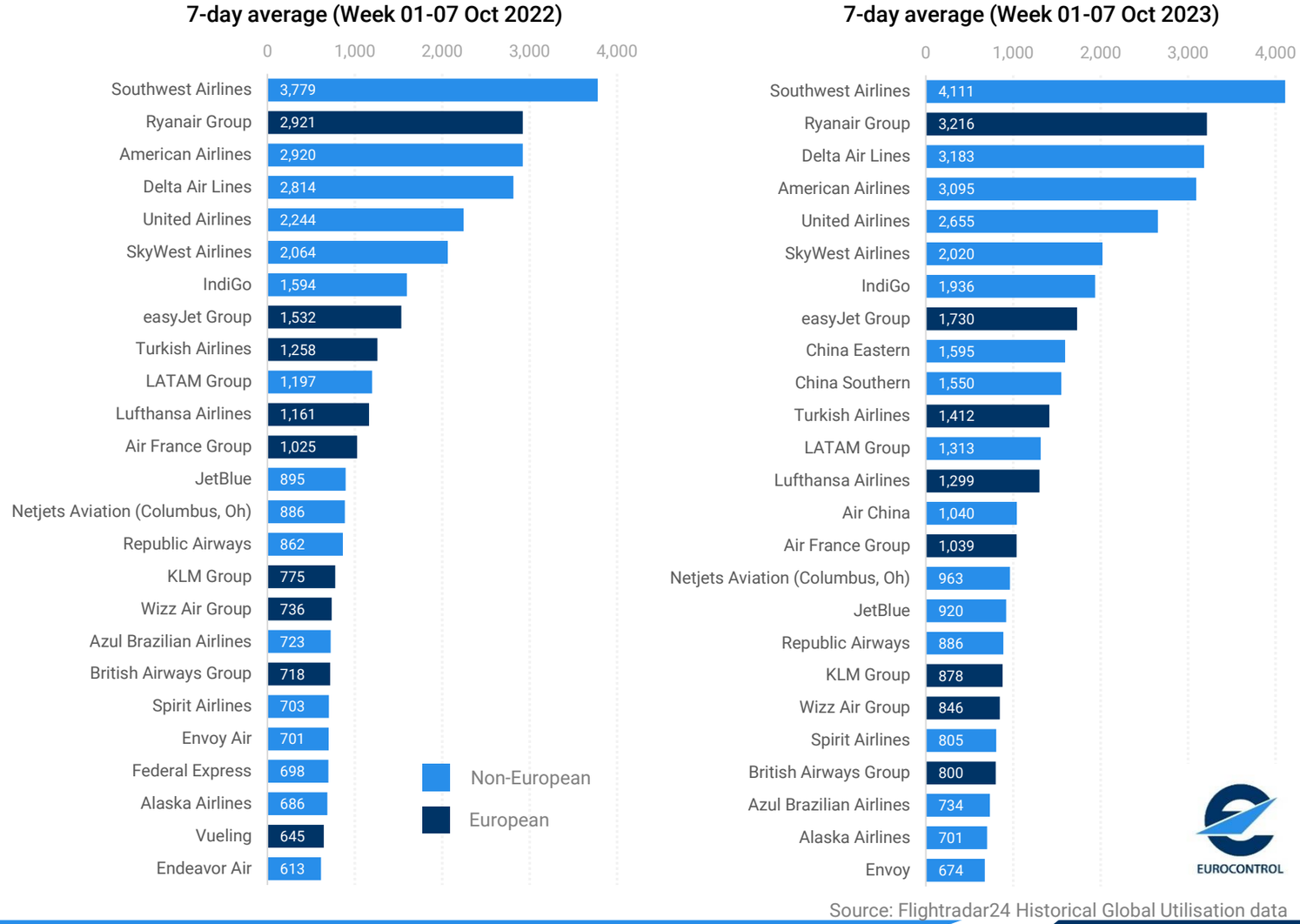
Week 02-08 Oct 2023 (vs 2022)



- Compared to 2022, the Mainline (+22%), Regional (+3%), Non-scheduled (+6%) and Low-cost (+6%) segments are recording growth.
- Business aviation (+2%) has increased especially in Italy, Spain and France, owing to special events (e.g. Rugby World Cup in France, political summit in Andalusia, closing parties in Ibiza). The market share of the Business Aviation segment is 7.3% of all flights for the period 1 -- 8 October 2023, 1 percentage point higher than the equivalent period in 2019.
- All-cargo (-5%) is now recording fewer flights in 2023 compared to 2022 levels. The All-cargo market share has stabilised (a market share of 3% of all flights for the period 1 – 8 October 2023, the same as it used to be before the COVID outbreak) 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.

Top 25 global aircraft operators

(average daily departure flights)

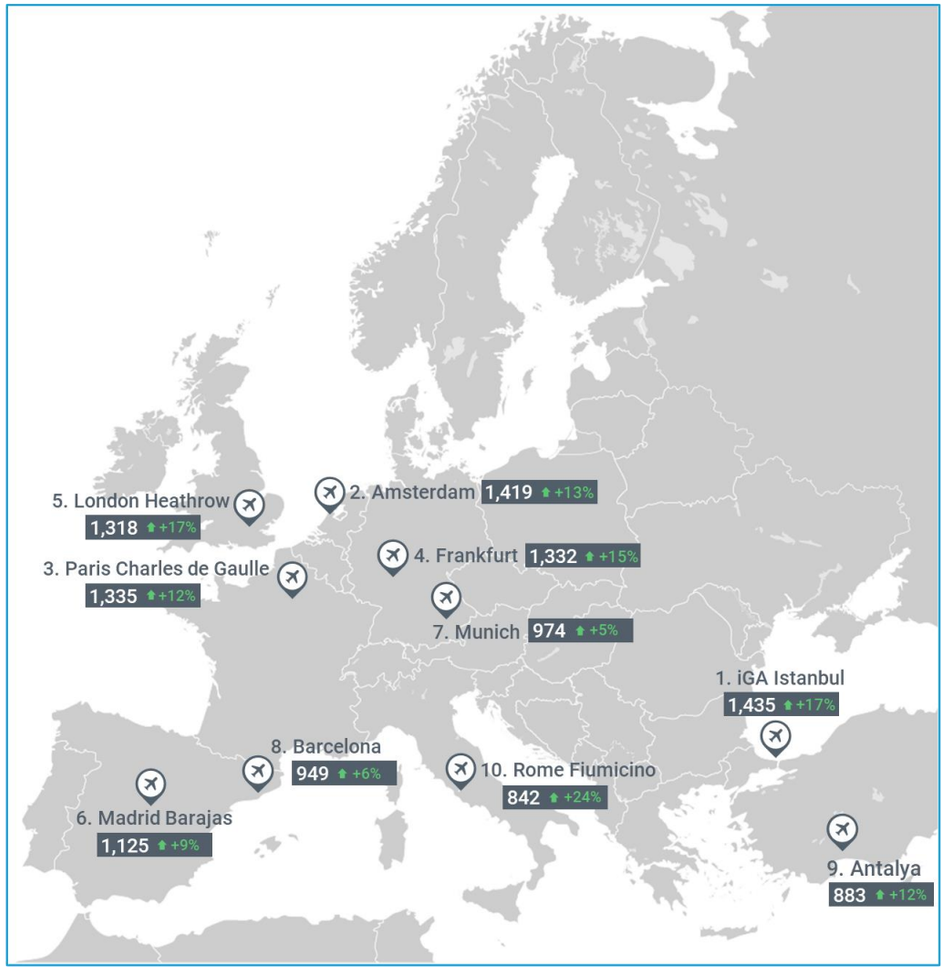


Source: Flightradar24 Historical Global Utilisation data

Over the week 01-07 October 2023:

- Eight European airlines are ranked in the top 25 global aircraft operators (compared to nine in 2022: Vueling does not make the 2023 list).
- The top European aircraft operator is Ryanair, which is second globally – the same rank as two weeks ago.
- The only other European airline in the global top 10 is easyJet (8th).
- Six more airlines make the top 25: Turkish Airlines (11th), Lufthansa (13th), Air France (15th), KLM (19th), Wizz Air (20th) and British Airways (22nd).

Top 10 airports



Airport ranking

Week 02-08 Oct 2023 (vs 2019)

No.	Airport	Avg. daily dep/arr flights	% prev week	vs 2022	vs 2019
1.	iGA Istanbul	1,435	-0%	+17%	+16%
2.	Amsterdam	1,419	+1%	+13%	-6%
3.	Paris Charles de Gaulle	1,335	+1%	+12%	-9%
4.	Frankfurt	1,332	+1%	+15%	-12%
5.	London Heathrow	1,318	+0%	+17%	-1%
6.	Madrid Barajas	1,125	+0%	+9%	-8%
7.	Munich	974	+1%	+5%	-21%
8.	Barcelona	949	+0%	+6%	-10%
9.	Antalya	883	-2%	+12%	+6%
10.	Rome Fiumicino	842	-2%	+24%	-6%

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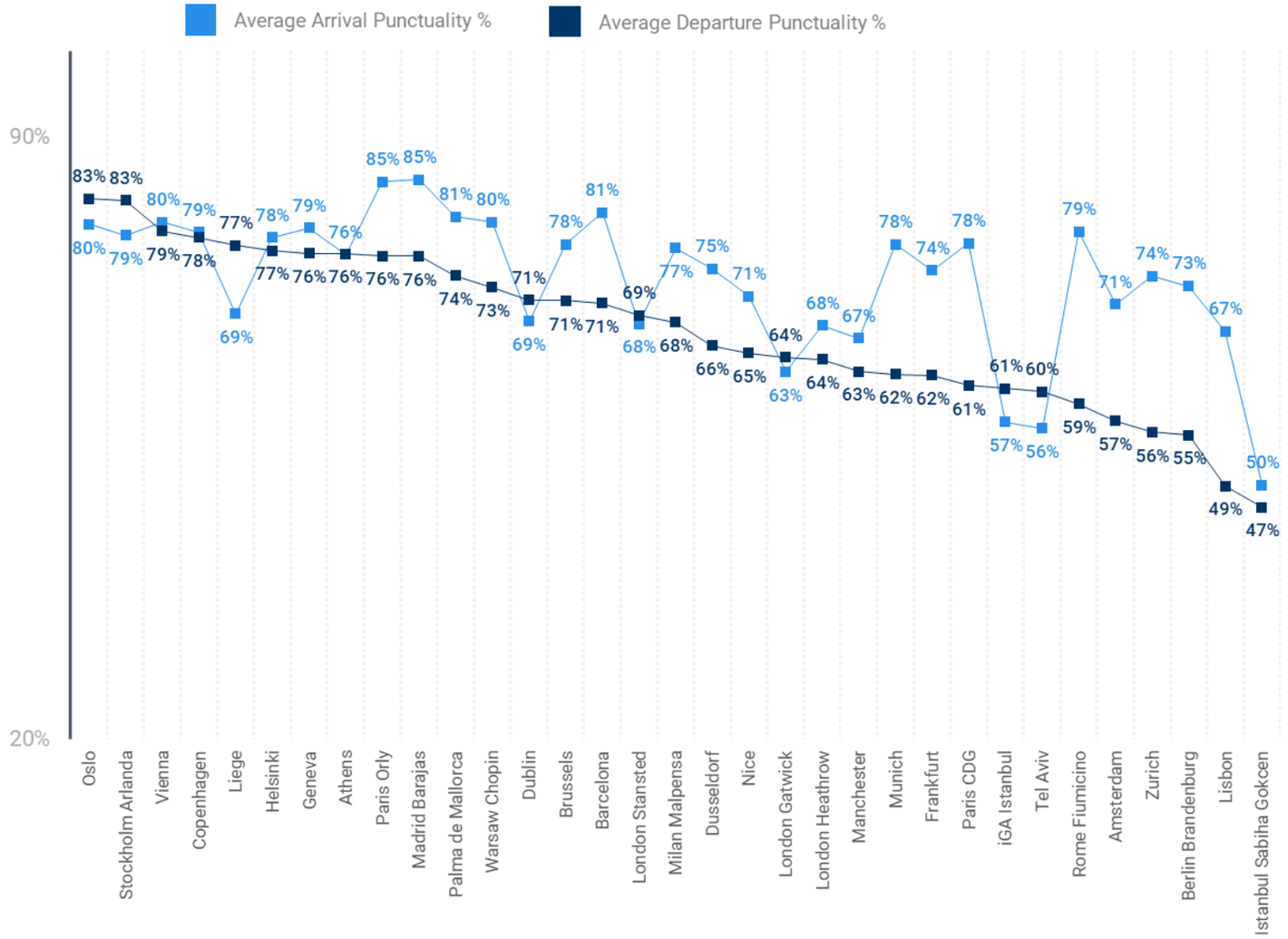
- Some changes in the ranking compared to the previous edition: Rome Fiumicino entered the top 10 (and Palma de Mallorca is no longer listed).
- Only four airports recorded notable growth vs last week: Amsterdam, Paris CDG, Frankfurt and Munich (+1%, each).
- All airports experienced sustained growth vs 2022, ranging from +5% (Munich) to +24% (Rome Fiumicino).
- Two top 10 airports (iGA Istanbul, and Antalya) are currently handling traffic above their 2019 levels.

Average arr/dep punctuality at main airports

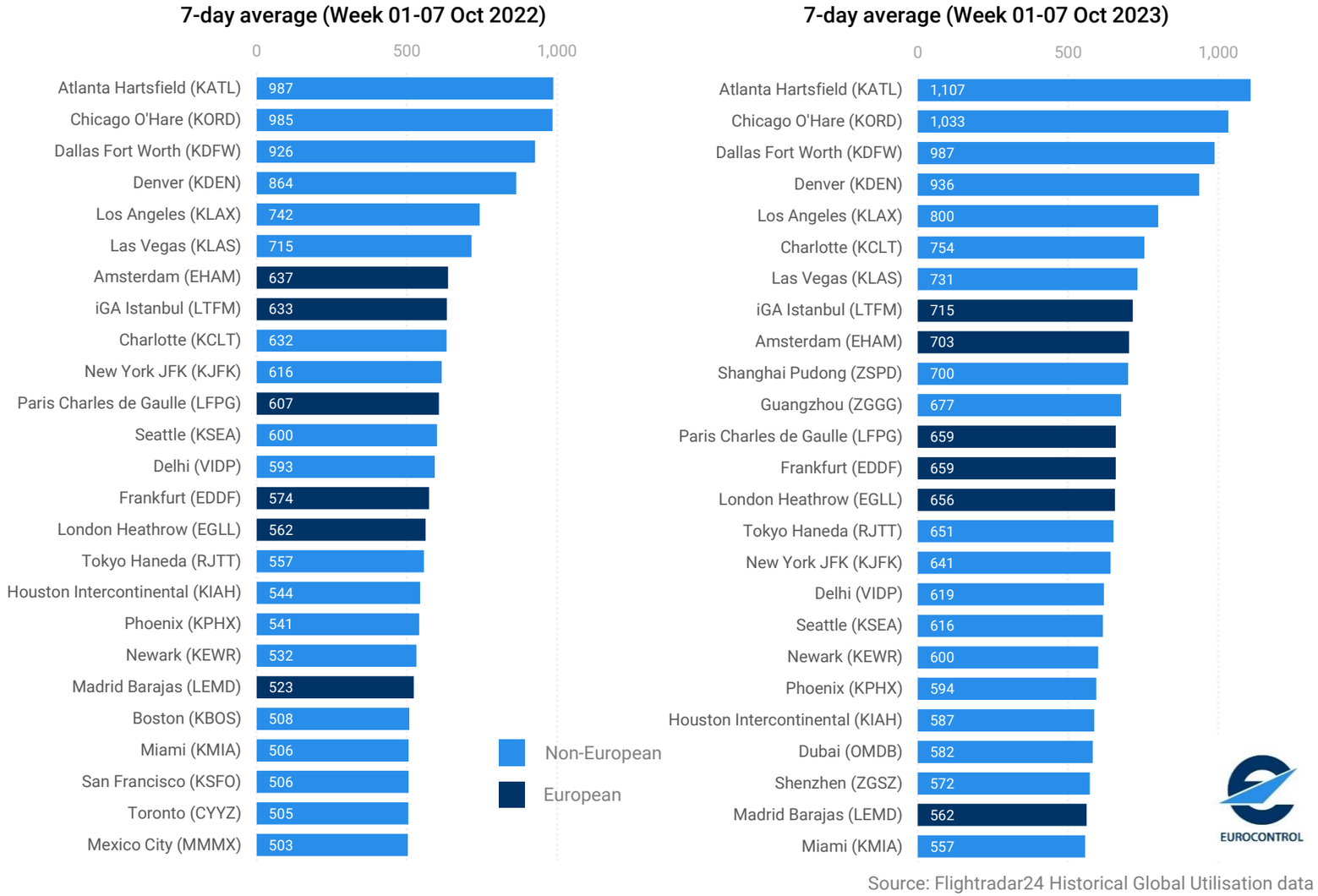
(Week 02-08 Oct 2023)



- 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, August and early September deteriorated again compared to 2019. Since the beginning of October, the 2023 punctuality figures have improved, but are still below 2019 levels.
- Arrival punctuality is higher (i.e. better) than departure punctuality at most airports.
- However, a few airports (notably Oslo, Stockholm, IGA Istanbul, Liège, Dublin, London Stansted, London Gatwick, iGA Istanbul 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)



Source: Flightradar24 Historical Global Utilisation data

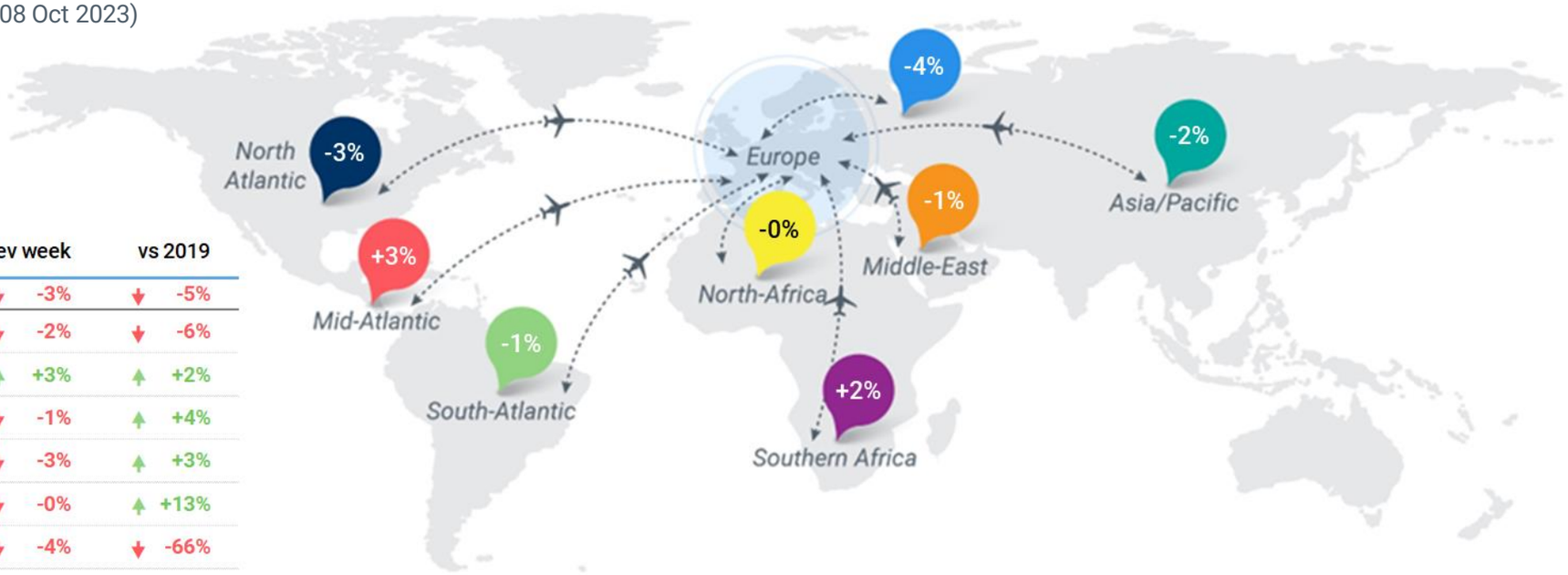
Over the week 01-07 October 2023:

- Six European airports are ranked in the top 25 of global airport departures (the same number as in 2022).
- The highest ranked European airport (8th) is iGA Istanbul Airport; same ranking as in 2022.
- The other European airports in the top 25 are Amsterdam (9th), Paris CDG (12th), Frankfurt (13th), London Heathrow (14th) and Madrid Barajas (24th).

Traffic flows

(average daily departure/arrival flights for week 02-08 Oct 2023)

Region	Average daily flights	vs prev week	vs 2019
Intra-Europe	24,439	-3%	-5%
Europe ↔ Asia/Pacific	762	-2%	-6%
Europe ↔ Mid-Atlantic	153	+3%	+2%
Europe ↔ Middle-East	1,515	-1%	+4%
Europe ↔ North Atlantic	1,399	-3%	+3%
Europe ↔ North-Africa	1,175	-0%	+13%
Europe ↔ Other Europe	401	-4%	-66%
Europe ↔ South-Atlantic	175	-1%	-8%
Europe ↔ Southern Africa	291	+2%	-6%
Non Intra-Europe	5,871	-1%	-10%



- The main traffic flow was intra-European with 24,439 daily flights last week, fewer (-3%) than the previous week. Intercontinental flows resulted in 5,871 daily flights on average last week, -1% vs the previous week.
- The second-largest regional flow is between Europe and the Middle East: 1,515 average daily flights last week represented a decrease of 1% vs the previous week (fewer flights with Kuwait, Saudi Arabia and Iraq).
- The third flow is to/from North America with 1,399 daily flights, slightly below the previous week's value.
- The fourth flow is to/from North Africa, with 1,175 flights per day, in line with vs the previous week's value.
- Flows with Other Europe (including the Russian Federation) remain massively reduced at -66% compared to 2019.
- Flows between Europe and Asia/Pacific have now largely recovered to only -6% compared to 2019. European flows with China (including Hong Kong) were at 223 daily flights last week (13% fewer than in the last edition).

Top 10 long-haul country pairs

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

Week 02-08 Oct 2023

No.	Country pair	Average daily flights	% prev week	% prev year	% 2019
1.	UK ↔ US	343	+3%	+23%	+6%
2.	Germany ↔ US	164	-3%	+4%	-2%
3.	France ↔ US	129	-6%	+18%	+2%
4.	Italy ↔ US	88	-5%	+24%	+17%
5.	Netherlands ↔ US	78	-2%	+3%	-8%
6.	Ireland ↔ US	73	-0%	+13%	+13%
7.	Spain ↔ US	66	-6%	+2%	-12%
8.	UAE ↔ UK	59	+1%	+16%	-8%
9.	Switzerland ↔ US	43	-4%	+25%	+7%
10.	Türkiye ↔ US	42	-1%	+23%	+81%

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- Since the last edition, there have been one change in the rankings for the top 10 long-haul country pairs: Spain ↔ US and Ireland ↔ US swapped places. Moreover, Switzerland ↔ US has moved one place up and Türkiye ↔ US has entered the top 10.
- All but two of the flows posted a decrease vs the previous week.
- Nine 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 flows posted an increase on the same week in 2022.
- Six flows are currently at or above 2019 levels (UK ↔ US, France ↔ US, Italy ↔ US, Ireland ↔ US, Switzerland ↔ US and Türkiye ↔ US).

Economics

Week 02-08 Oct 2023

06 Oct 2023
avg fuel price:

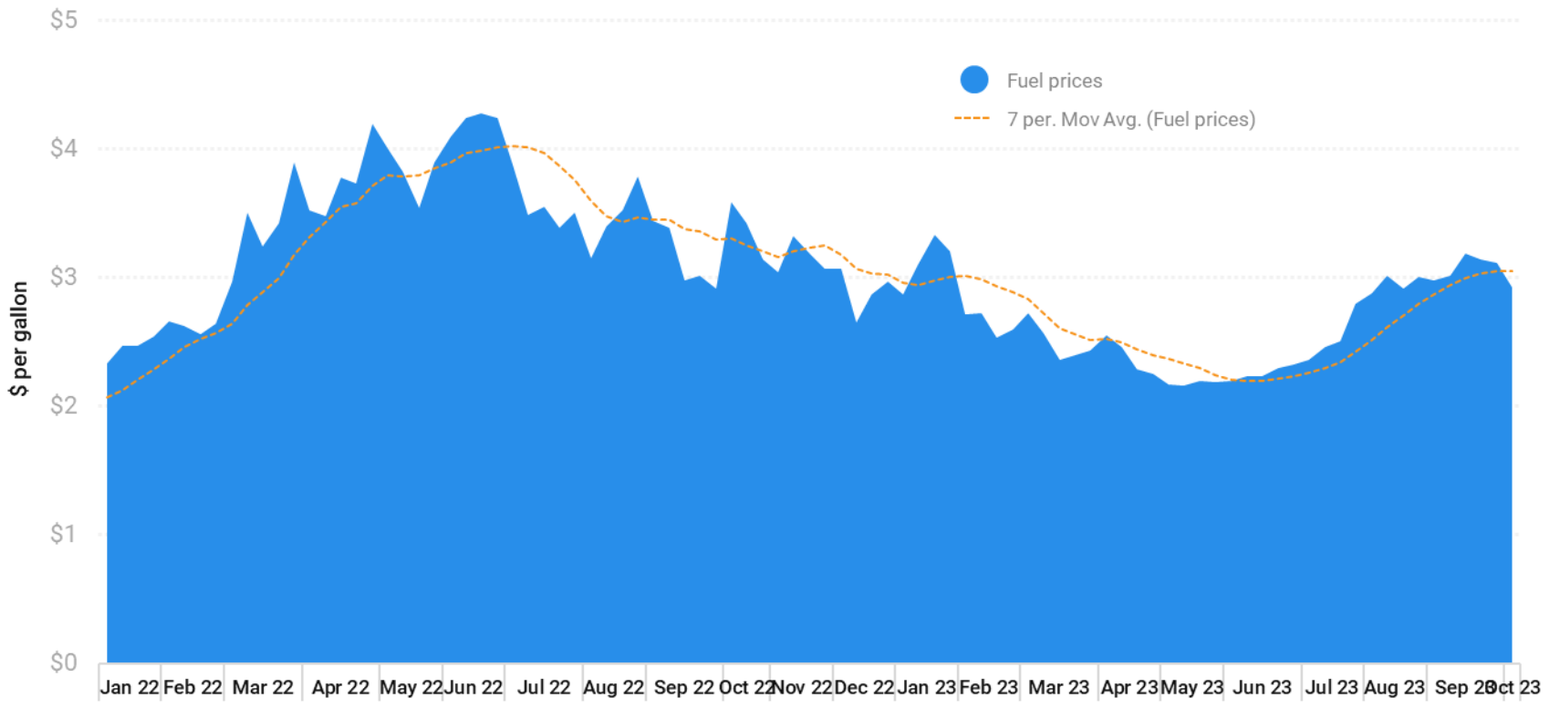
$2.93 /gallon

-7%

vs. $3.14 /gallon
on 22 Sep 2023

Source: IATA/Platts

Jet fuel price (Europe)



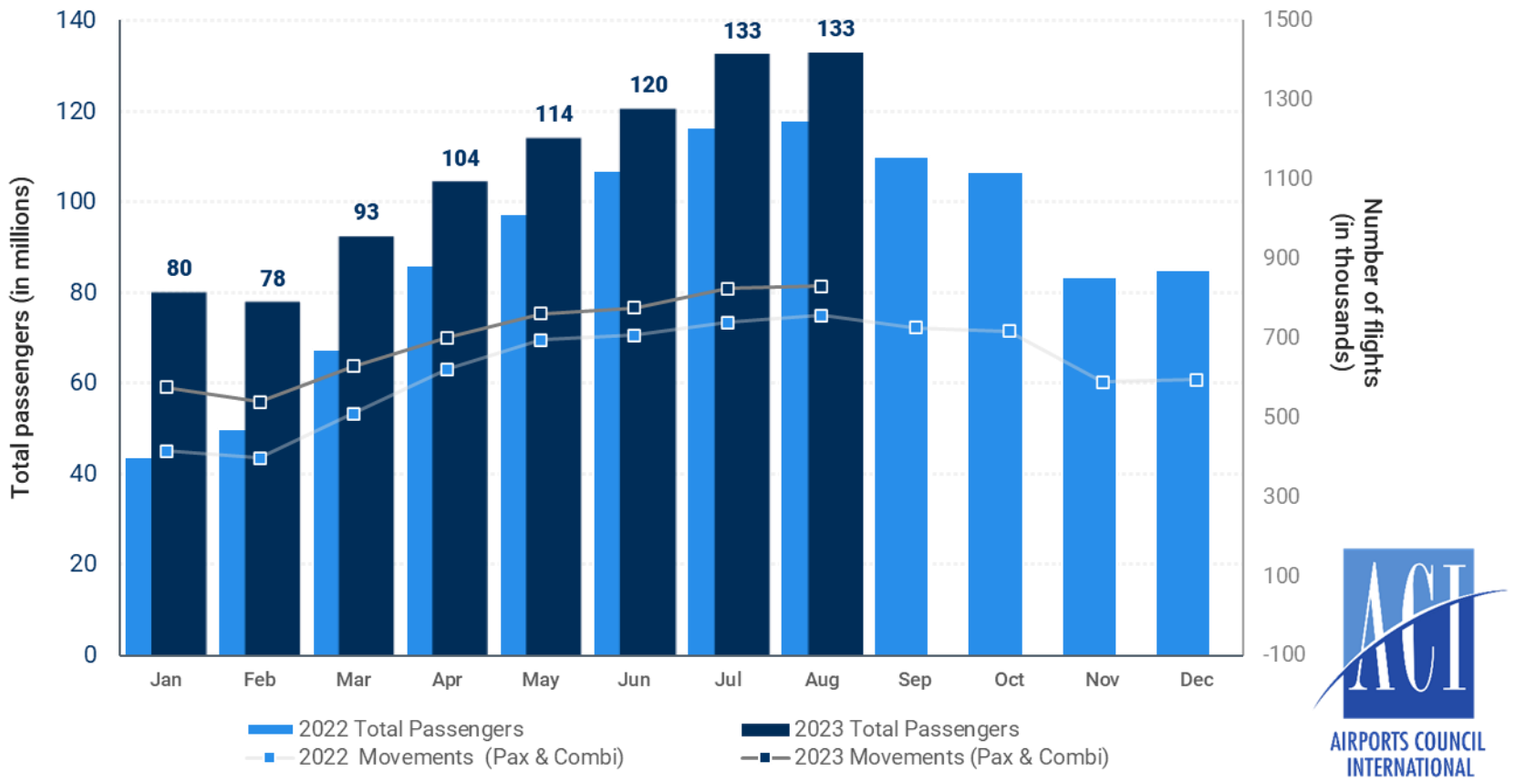
Source: IATA/Platts

- The average price of jet fuel was at 2.93 USD/gallon on 06 October 2023, lower (-7%) compared to the last Overview, and 2% above the value at the beginning of 2023.
- Based on a moving average trend, fuel prices in Europe mainly declined between June 2022 ($4.0/gallon) and June 2023 ($2.20/gallon).
- Since June 2023, jet fuel prices have begun to rise after Saudi Arabia (and the Russian Federation) started to cut oil production. In the last few weeks they have started to decline.

Top 40 European airports: passengers

Number of passengers and flights per month

Passengers and flights at ECAC top 40 Airports



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Based on ACI passenger data, the total number of passengers and corresponding aircraft movements for the top 40* ECAC airports show:

- 133 million passengers were recorded in August 2023, corresponding to a 13% growth (vs August 2022), while corresponding movements increased by 10% over the same period.
- On a year-to-date basis, these airports welcomed 855 million passengers, which is 25% higher than in 2022 (same period).
- In any case, passenger growth per day for August 2023 increased (+13%) faster than movements' growth per day (+10%), explained by the higher load factors and bigger aircraft.

* The sample is based on top 40 ECAC airports for year 2022. A passenger travelling between these airports will be counted both departing and arriving.

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