AVIATION INTELLIGENCE+

EUROCONTROL

EUROPEAN AVIATION OVERVIEW

09-15 May 2023

Wednesday 17 May 2023

Headlines

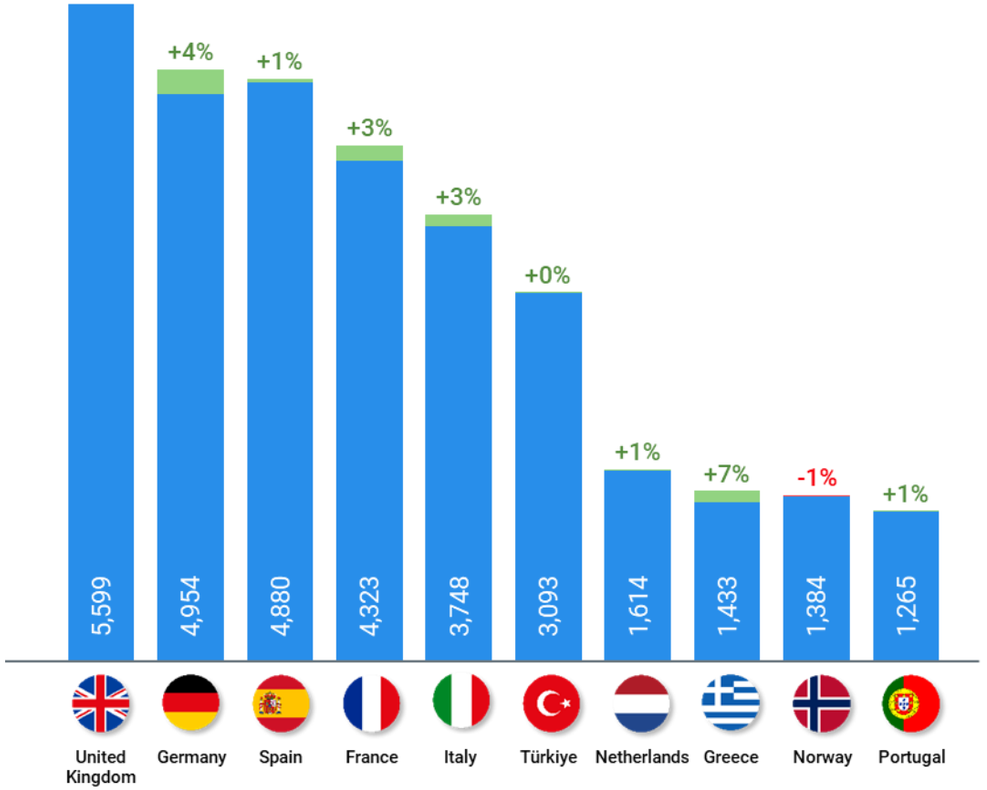
(Week 09-15 May 2023)

- The Network recorded 29,230 average daily flights (+7% vs 2022), increasing (+1%) vs the previous week and standing at 93% of 2019 levels.
- The top 10 aircraft operators recorded a slight increase (+0.8%) on the previous week.
- For the first half of May, the number of flights in the Network was 92% of the 2019 levels, spot on the base scenario of the flight forecast (released in December 2022).
- Network is still affected by (local) industrial action on specific days in France, the continuation of a series of strikes which started earlier this year (reform of pension law).
- Arrival and Departure punctuality continue to improve, closing 2 and 4 percentage points (respectively) below 2019.
- EUROCONTROL billed 732M€ of en-route charges for April flights; 19% above the amount billed for the April 2022 flights. On a year-to-date basis, EUROCONTOL billed 2,547M€ in 2023, +29% compared to 2022, owing to service units (flights) increases.
- The Jet fuel price closed at 2.16 USD/gallon on 12 May, decreasing (-4%) on last edition. Current prices have decreased by 21% compared to the ones at the beginning of the year.

Top 10 Busiest States

On week 09-15 May 2023

(all flights incl. overflights compared with previous week)



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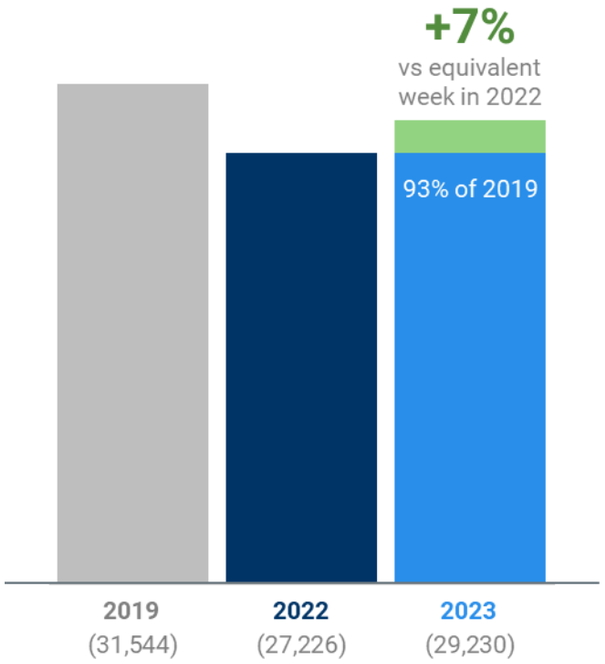
Traffic Situation

Average daily flights (including overflights)

Week 09-15 May 2023



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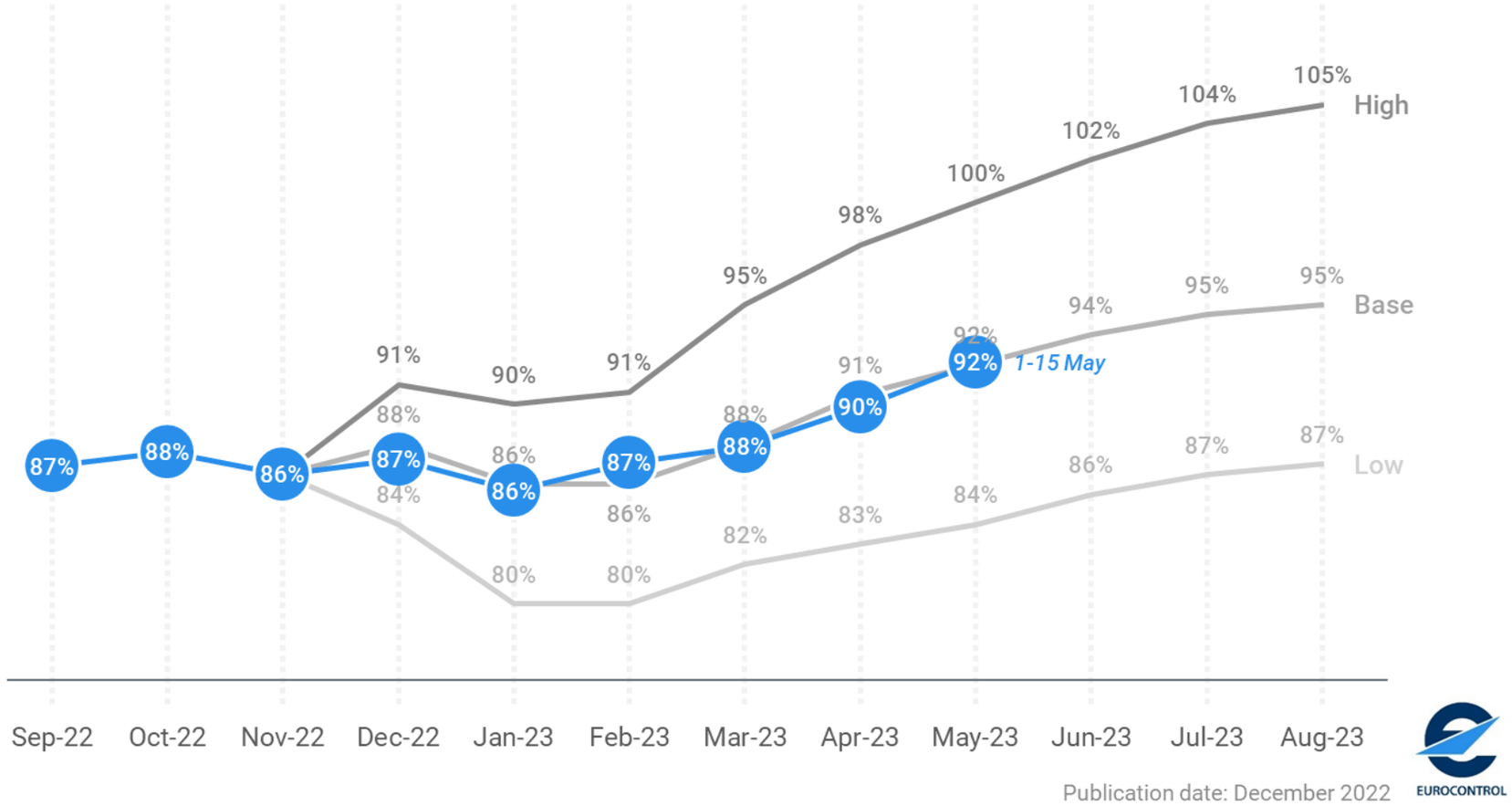
Overall Situation Compared to the EUROCONTROL Traffic Scenarios

(base year 2019)



Publication date: December 2022

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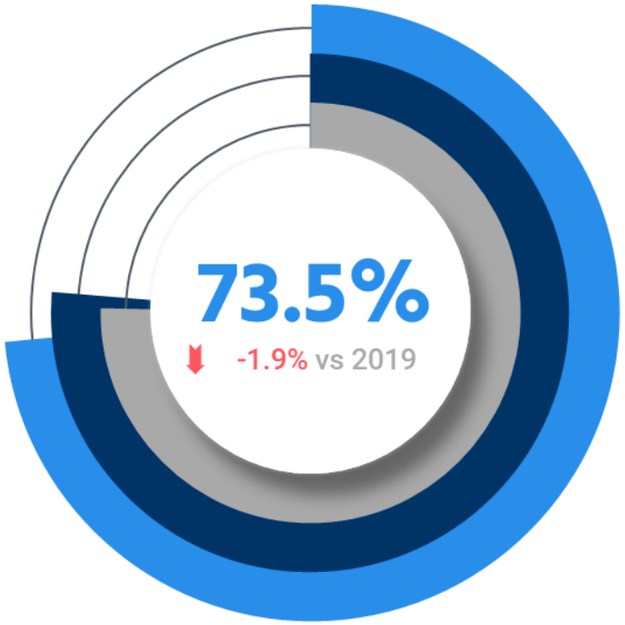
- The latest EUROCONTROL Traffic scenarios were published on 16 December 2022.
- Since that date, network traffic has evolved around the base scenario.
- For the first half of May 2023, flights closed at 92% of May 2019 levels in line with our base scenario (92%).
- On a year-to-date basis, network traffic is at 88% of 2019 and +16% vs 2022

Arrival & Departure Punctuality

(at top airports for the last week)

Week 09-15 May 2023

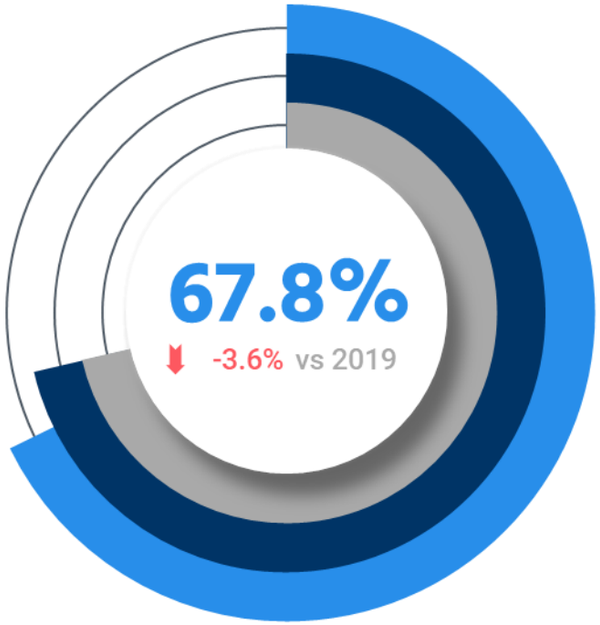
ARRIVAL PUNCTUALITY



75.4% _____ in 2019

76.3% _____ in 2022

DEPARTURE PUNCTUALITY



71.4% _____ in 2019

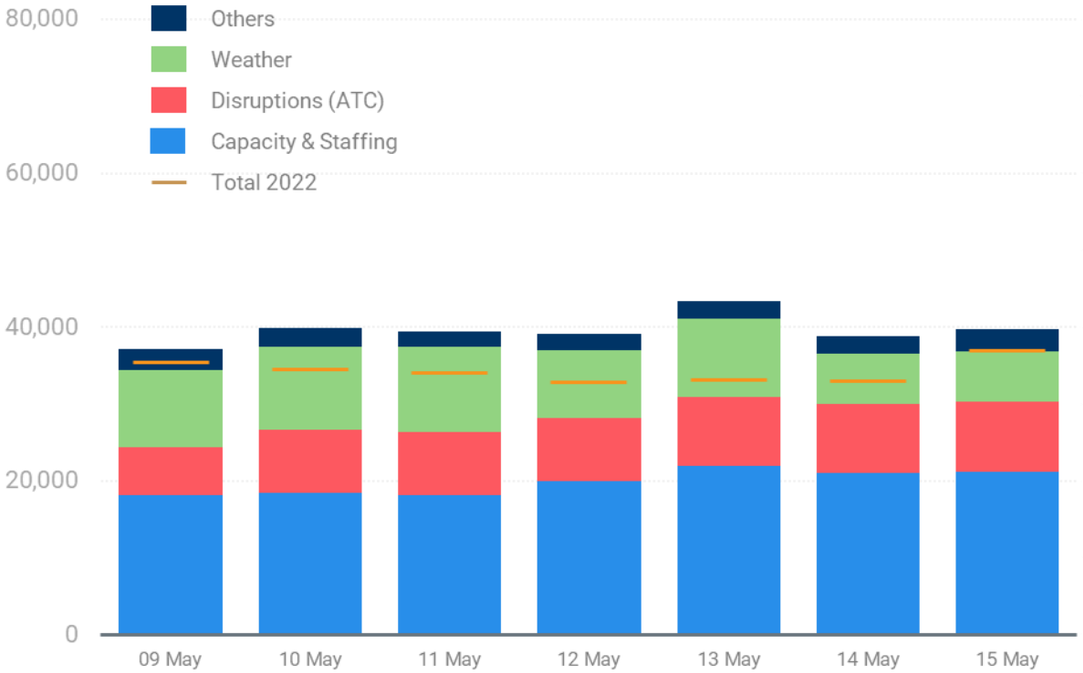
71.4% _____ in 2022

- Network punctuality decreased when compared to the equivalent week in 2019, with arrival at 73.5% and departure at 67.8%, decreasing by 1.9 and 3.6 percentage points respectively.
- In a familiar pattern to recent weeks, French industrial action still influenced performance, with actions continuing in Paris ACC on Wednesdays and Saturdays. Elsewhere in the network ATC equipment issues impacted Greece both en-route and at Athens Airport.
- Looking at airports; ATC staffing shortages continue at Copenhagen airport. Work in progress at Antalya airport continued causing delays as aerodrome capacity was reduced. Palma, Amsterdam Schiphol, London Gatwick, London Heathrow, Frankfurt Main all experienced weather delays, mainly low visibility and thunderstorm related.

En-Route ATFM Delays

Delays per cause (EUROCONTROL Area)

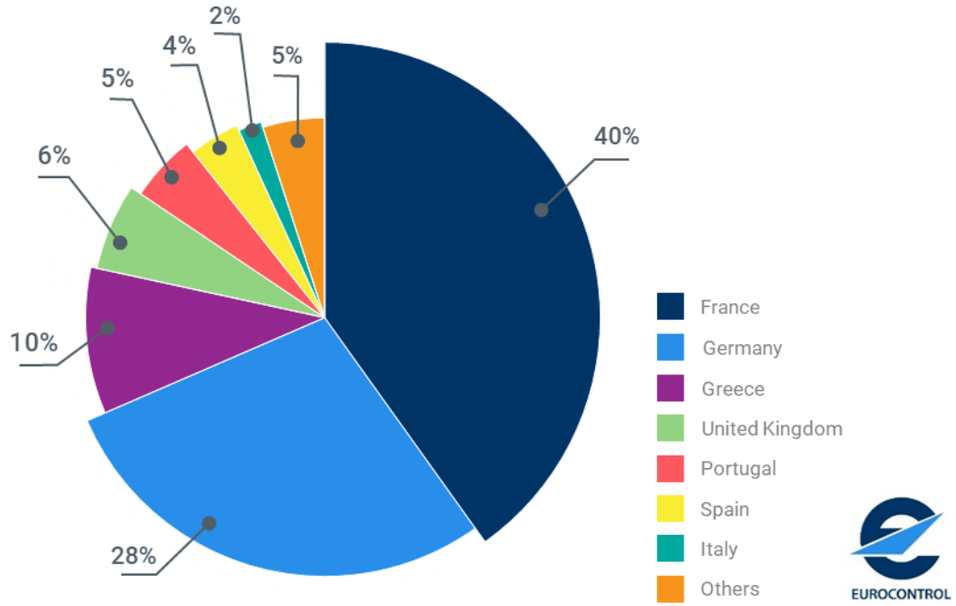
In minutes (7-day average) in 2023



- Based on a rolling week average, en-route ATFM delays have been constantly higher than in 2022.
- ATC industrial action in France are now taking place every Wednesday and Saturday (Paris ACC, until 1st of June). The impact on the specific days (Wed 10 & Sat 13) is not visible on the graph as the delays are averaged over 7 days.
- Last week, en-route ATFM delays were just below 40,000 minutes per day, on average, still high but improving on the levels recorded two weeks ago (circa 50,000 minutes per day over the period 02 – 08 May 2023).

Share of en-route ATFM delays

Week 09-15 May 2023

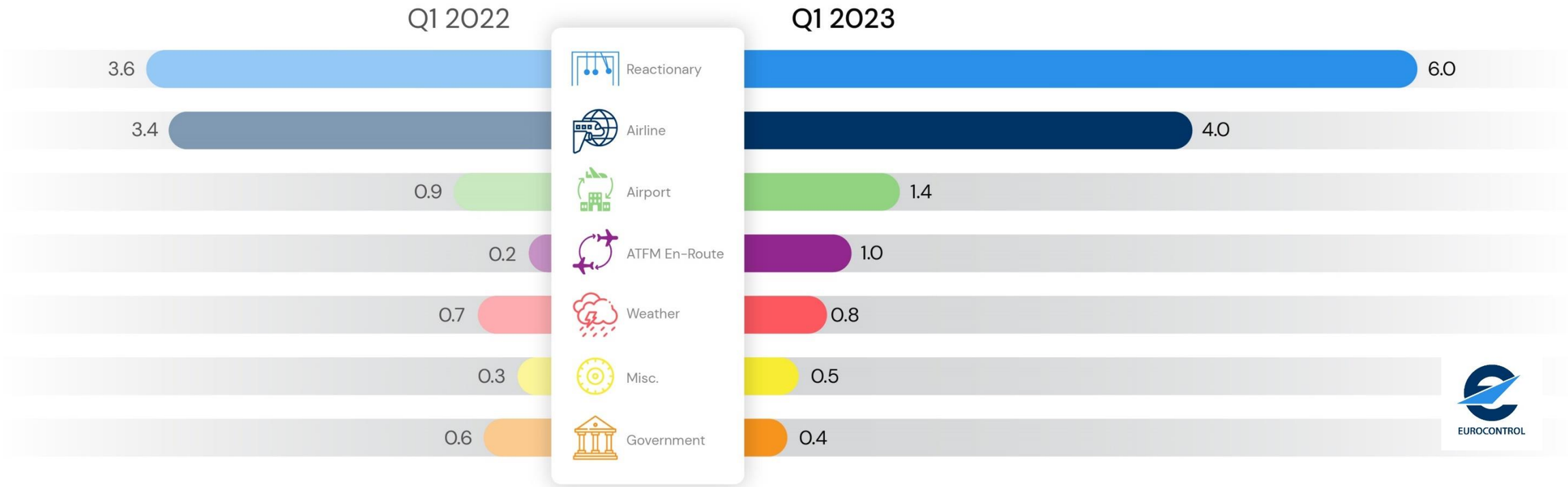


- Due to two days of industrial action, France accounted for 40% of all en-route ATFM delays over the last week.
- Germany came second with 28% of all en-route ATFM delays, mainly concentrated in Karlsruhe, Munich and Bremen ACCs.
- Greece came third with 10% of all en-route ATFM delays, due to staffing issues.

Departure delay (all-causes) breakdown

Average delay per flight on departure

In minutes, Q1 2023 vs Q1 2022



- ATC Industrial actions was the main contributor to the significant increase of en-route ATFM delays during Q1 2023, these increasing from 0.2mins per flight to 1.0mins per flight,
- Non-ATC industrial actions, winter weather related delays (e.g. snow, strong winds or low visibility) and ground handling delays contributed to the increased departure delays
- Reactionary delays increased from 3.6mins per flight to 6.0mins per flight with the overall share jumping from 38% to 43% of all-causes delay,
- COVID-19 related measures and consequent delays dropped during Q1 2023 relative to 2022, as can be seen in the reduction in the Government delay group (security and immigration).

Top 10 Countries

Dep/Arr to the equivalent week in 2019

Week 09-15 May 2023

No.	Country	Average daily flights	% prev week	% prev year	% 2019
1.	United Kingdom	5,599	+1%	+6%	-10%
2.	Germany	4,954	+4%	+3%	-17%
3.	Spain	4,880	+1%	+7%	+0%
4.	France	4,323	+3%	+7%	-0%
5.	Italy	3,748	+3%	+8%	-3%
6.	Türkiye	3,093	+0%	+18%	+11%
7.	Netherlands	1,614	+1%	-0%	-11%
8.	Greece	1,433	+7%	+8%	+4%
9.	Norway	1,384	-1%	-2%	-9%
10.	Portugal	1,265	+1%	+10%	+7%

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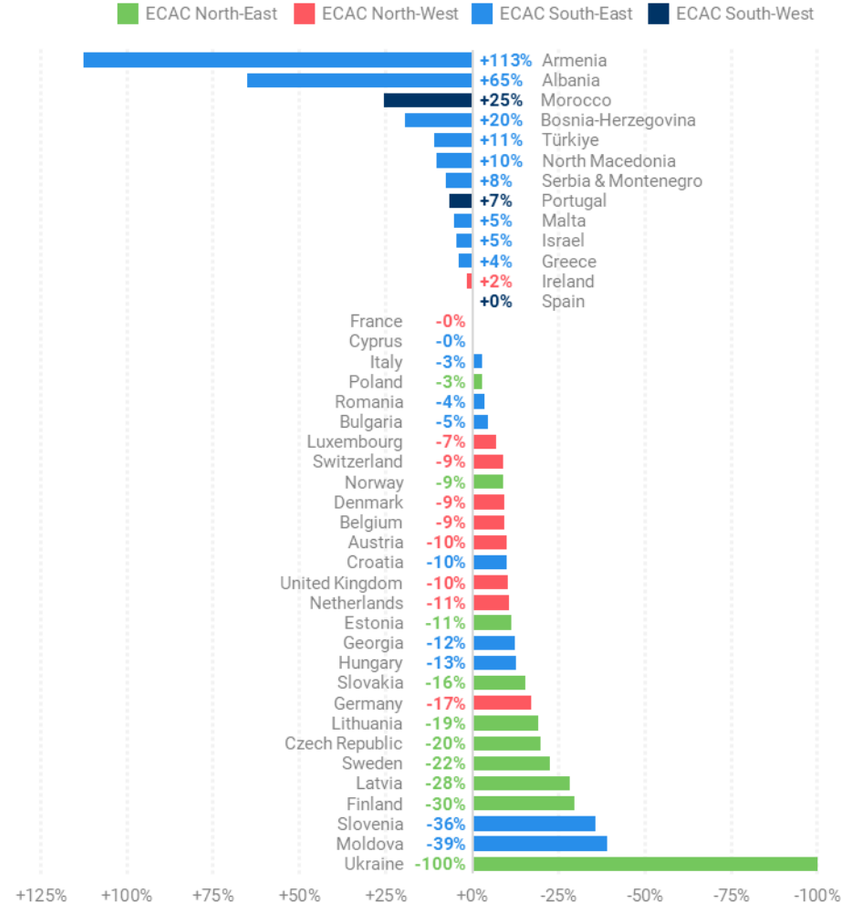
- The top 10 States recorded higher number of flights (+6.5%) than in the previous week.
- Compared to the previous edition: Germany and Spain swapped places. Greece entered the top 10, ranking eighth, while Switzerland (previously 10th) exited.
- Greece recorded a growth rate of 7%, owing to increases from light aircraft operators, Condor, Aegean, TUI and Eurowings. Germany posted a 4% increase due to light aircraft operators, Condor, Eurowings and Lufthansa.
- Four States within the top 10, have now recorded growth above 2019 (Türkiye, Portugal, Greece and Spain). France and Italy are relatively close to the pre-COVID levels. The four remaining States are still between 17% and 9% below 2019 levels.

States in the EUROCONTROL Network

Compared to the equivalent week in 2019

Dep/Arr flights for week 09-15 May 2023



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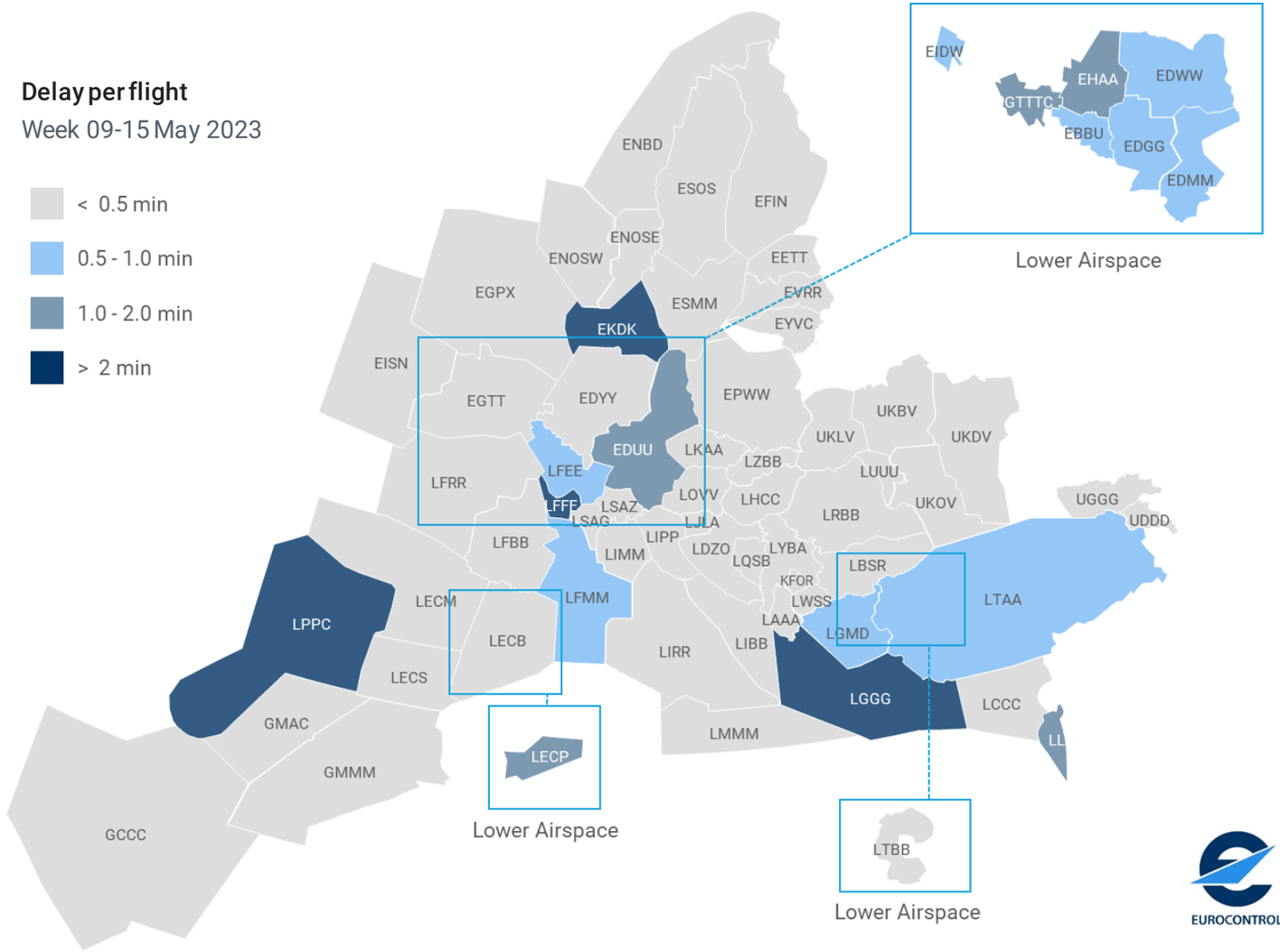
En-Route ATFM delayed flight per Area Control Centre



- Over the last week, en-route ATFM delays have slightly reduced compared to the week before but are still high (39,700 minutes per day, on average).
- Compared to the same week in 2022, En-Route ATFM delays were 16% higher this year.
- The main reason is related to industrial action in France, which was mainly affecting Paris ACC (10th and 13th of May 2023). Additionally, there were staffing issues in Greece and North Macedonia.
- Last week, the most affected ACCs were Athens (4.1 min/flight), Paris (3.4), Lisbon (2.2), Copenhagen (2.0), Amsterdam (1.6) and Karlsruhe (1.5).
- Overall, France was responsible for 40% of all en-route ATFM delays last week, followed by Germany (28%) and Greece (10%).

Top 10 Aircraft Operators

Week 09-15 May 2023 (avg daily flights)

No.	Aircraft operator	Average daily flights	% prev week	% prev year	% 2019
1.	Ryanair Group	3,078	-0%	+7%	+24%
2.	easyJet Group	1,656	+0%	+7%	-8%
3.	Turkish Airlines	1,527	+0%	+18%	+17%
4.	Lufthansa Airlines	1,215	+1%	-2%	-25%
5.	Air France Group	1,066	+1%	+9%	-9%
6.	KLM Group	844	+1%	+3%	-10%
7.	British Airways Group	812	+1%	+13%	-14%
8.	Wizz Air Group	806	+0%	+9%	+35%
9.	SAS Group	682	+2%	+9%	-27%
10.	Vueling	642	+2%	+4%	+1%

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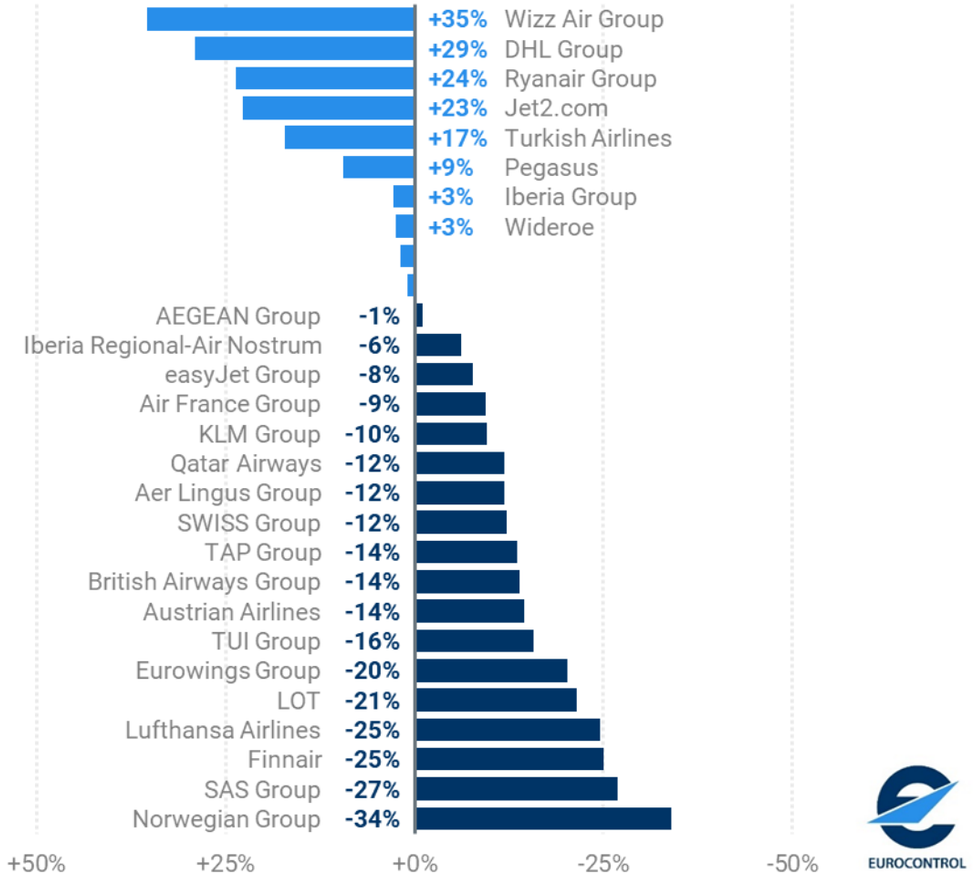
- The top 10 aircraft operators recorded roughly the same number of flights (+0.8%) on the previous week.
- Last week, four airlines had a stable number of operations compared to the week before (Ryanair, easyJet, Turkish Airlines and Wizz Air).
- SAS and Vueling posted a 2% growth (each) on the week before as the operators added flights on the flows Greece ↔ Sweden and Greece ↔ Norway (SAS) and on the flows France ↔ Italy, France ↔ Spain and domestic Spain (Vueling) .
- Four airlines within the top 10 surpassed their 2019 flight levels: Wizz Air (+35%), Ryanair (+24%), Turkish Airlines (+17%) and Vueling (+1%) .

Aircraft Operators in the EUROCONTROL Network

Compared to the equivalent week in 2019
Dep/Arr flights for week 09-15 May 2023



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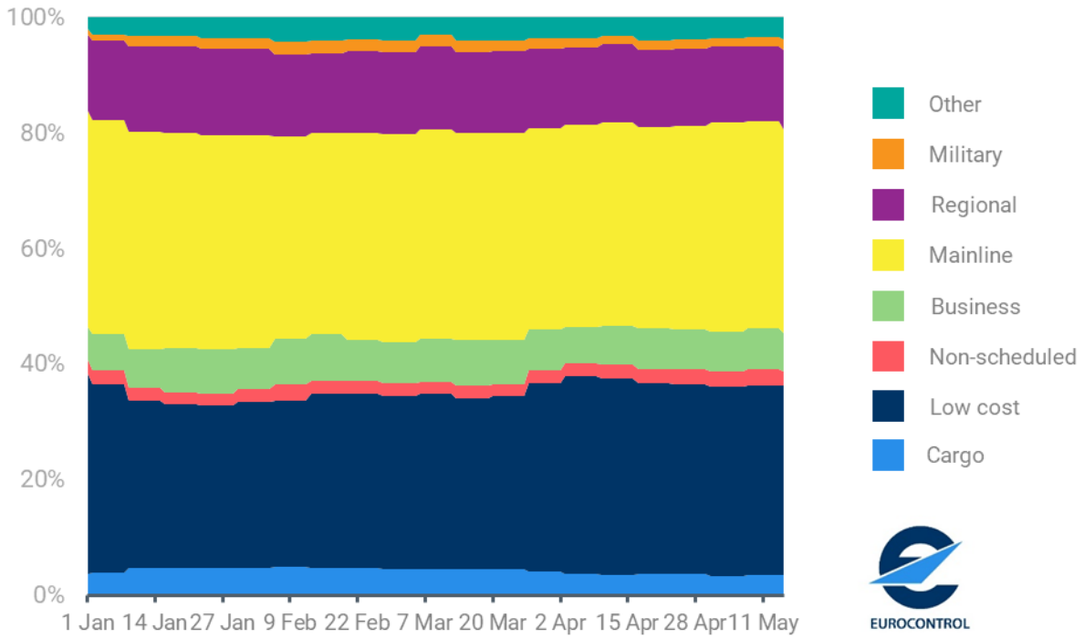
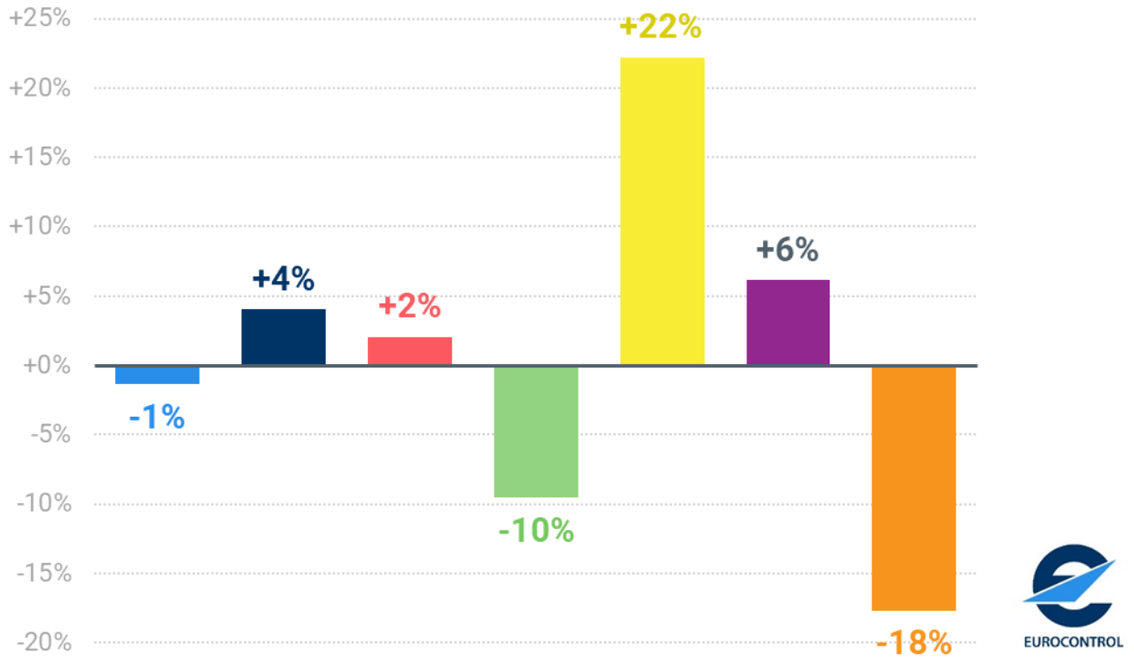
Market Segments in the EUROCONTROL Network

7-day average share of total flights



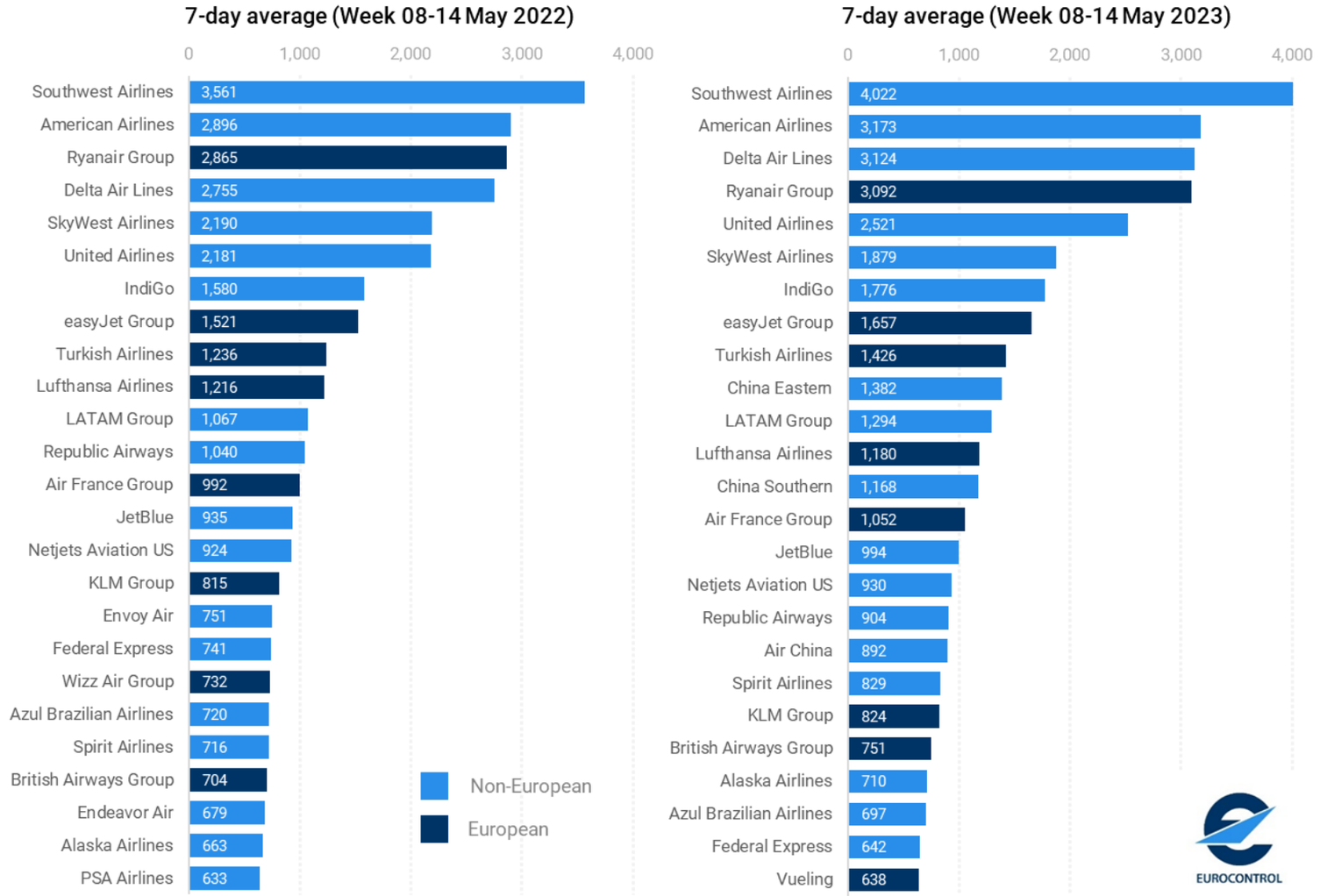
Week 09-15 May 2023 (vs 2022)



- Compared to 2022, Mainline (+22%), Regional (+6%), and Low-Cost (+4%) are recording growth compared to last year owing to the continuing recovery after the COVID outbreak (pent-up demand).
- Business Aviation (-10%) and All-Cargo (-1%) are now recording fewer flights in 2023 compared to 2022 levels. All-Cargo market share has now stabilized (representing a market share of 3.6% of all flights in April 2023) and is now levelling off (no more rebound effect on 2022 events: Omicron, start of the Ukraine invasion) with the start of the summer schedules. Business Aviation (6.8% of the total flights in April 2023) is levelling off too as the commercial airline activity (mainline, regional, low-cost) has now almost closed the gap between 2023 and 2019.
- Charter (+2%), accounting for a 2.5% market share of all flights in April 2023, records slightly more flights, owing to some increases on touristic flows with Greece, Egypt,(compared to same week in May 2022).

Top 25 Global Aircraft Operators

(average daily departure flights)

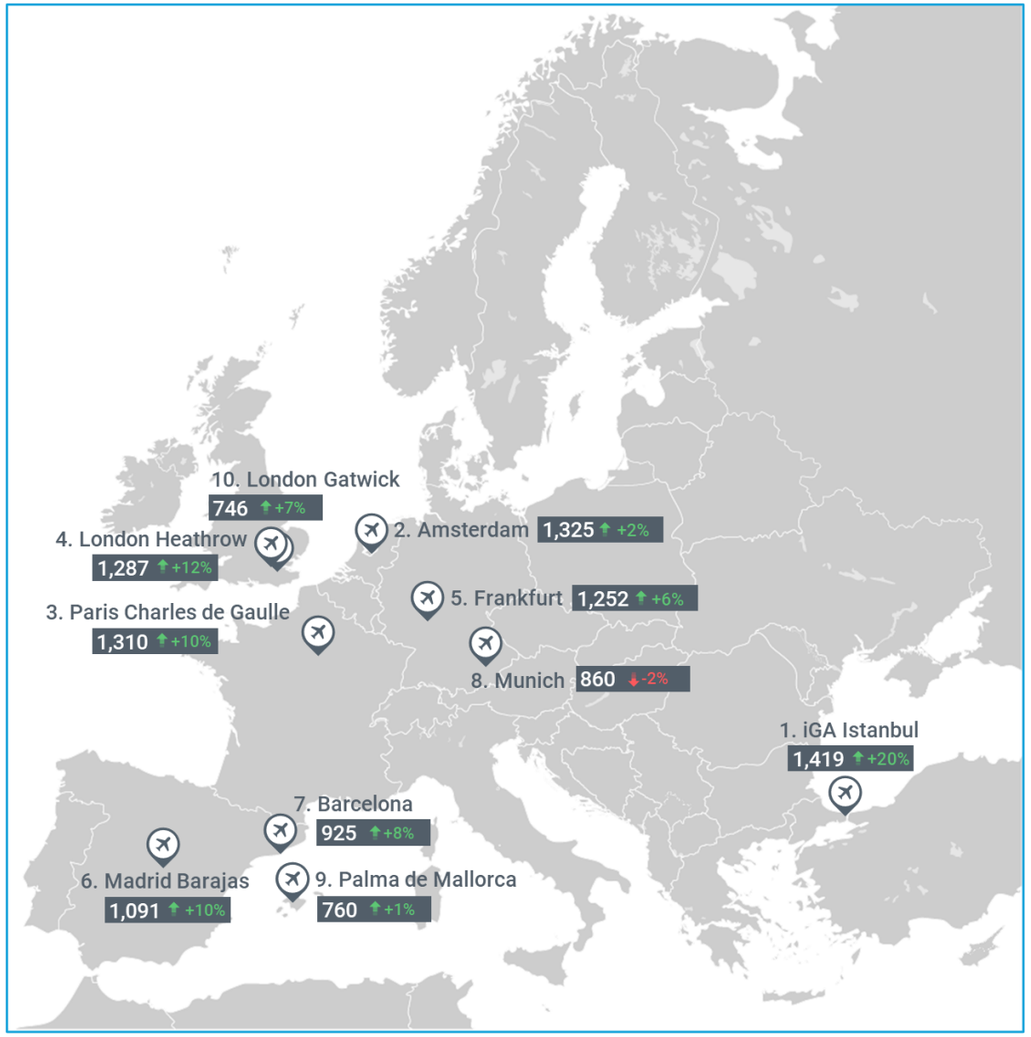


Source: Flightradar24 Historical Global Utilisation data

Over the last week:

- Eight European airlines are ranked in the Top 25 global aircraft operators (like in 2022).
- The first European aircraft operator (4th) is Ryanair (same rank compared to two weeks ago).
- The other European airlines in the Top 10 are easyJet (8th) and Turkish Airlines (9th).
- The top 15 is complemented by Lufthansa (12th) and Air France (14th).
- KLM and British Airways are respectively ranked 21st and 22nd.
- Vueling (25th) is the newcomer in this 2023 ranking.
- Wizz Air is the only European airline that has slipped out of the top 25 since 2022.

Top 10 Airports



Airport Ranking

Week 09-15 May 2023 (vs 2019)

No.	Airport	Avg. daily dep/arr flights	vs 2022	vs 2019
1.	iGA Istanbul	1,419	+20%	+24%
2.	Amsterdam	1,325	+2%	-11%
3.	Paris Charles de Gaulle	1,310	+10%	-6%
4.	London Heathrow	1,287	+12%	-3%
5.	Frankfurt	1,252	+6%	-16%
6.	Madrid Barajas	1,091	+10%	-8%
7.	Barcelona	925	+8%	-8%
8.	Munich	860	-2%	-29%
9.	Palma de Mallorca	760	+1%	+7%
10.	London Gatwick	746	+7%	-9%

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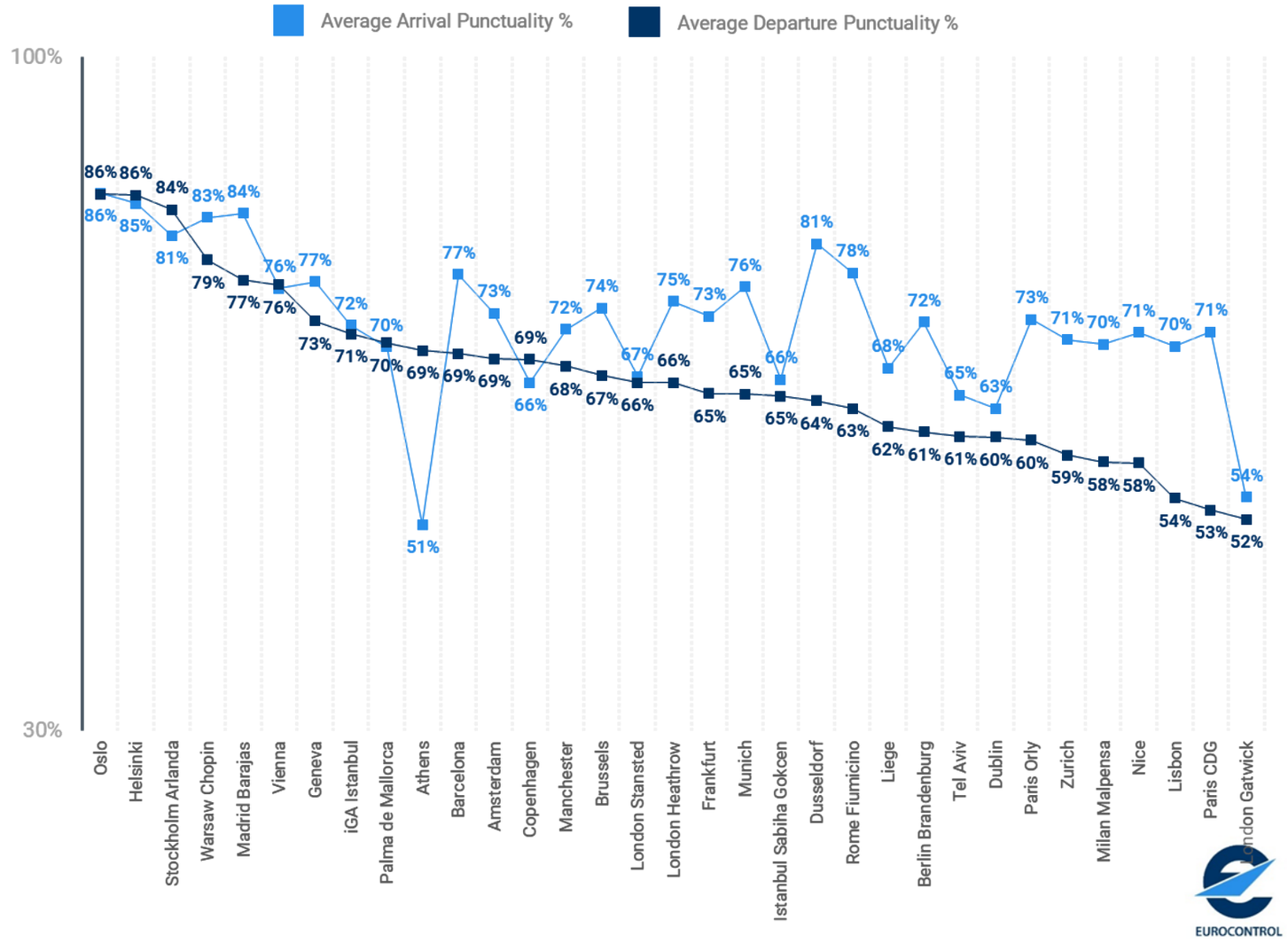
- Some changes in the ranking compared to the previous edition: swap between Paris CDG and London Heathrow. London Gatwick entered the Top 10. And Rome Fiumicino exited.
- Almost all airports experienced sustained growth on 2022; ranging from 1% (Palma de Mallorca) to 20% (iGA Istanbul).
- iGA Istanbul and Palma de Mallorca are the two airports in 2023 amongst the top 10 surpassing their 2019 levels.

Average Arr/Dep Punctuality at Main Airports

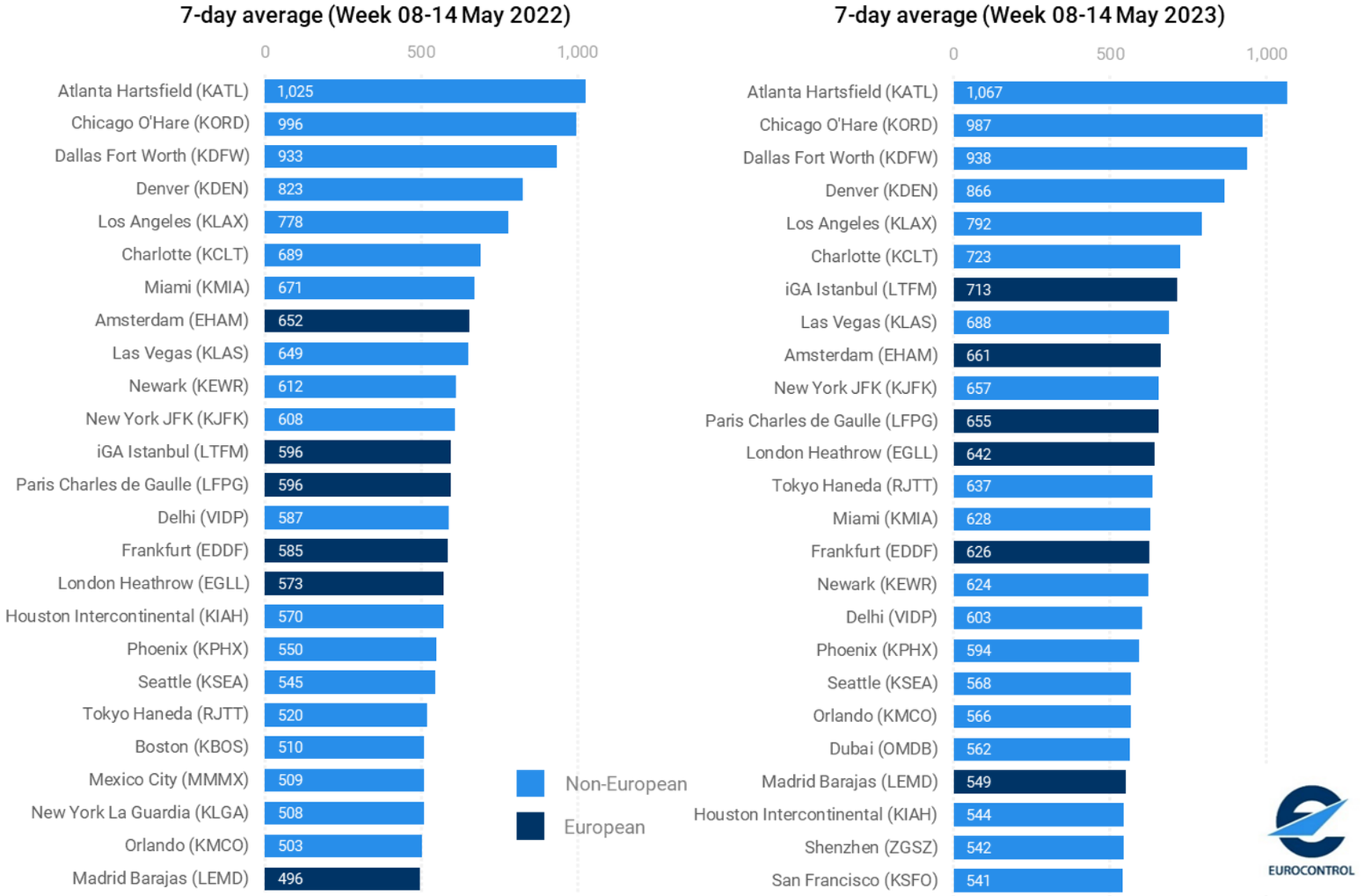
(Week 09-15 May 2023)



- At most airports, arrival punctuality is higher (i.e. better) than departure punctuality.
- After having deteriorated in early March because of significant en-route ATFM delays related to industrial action in France, arrival and departure punctuality have only marginally improved in May and are still worse than in 2022.
- However a few airports, notably Helsinki, Stockholm, Vienna, Athens, Palma de Mallorca and Copenhagen have departure punctuality which is higher than arrival punctuality which indicates that these airports have been able to absorb delays.

Top 25 Global Airport Departures

(average daily departure flights)



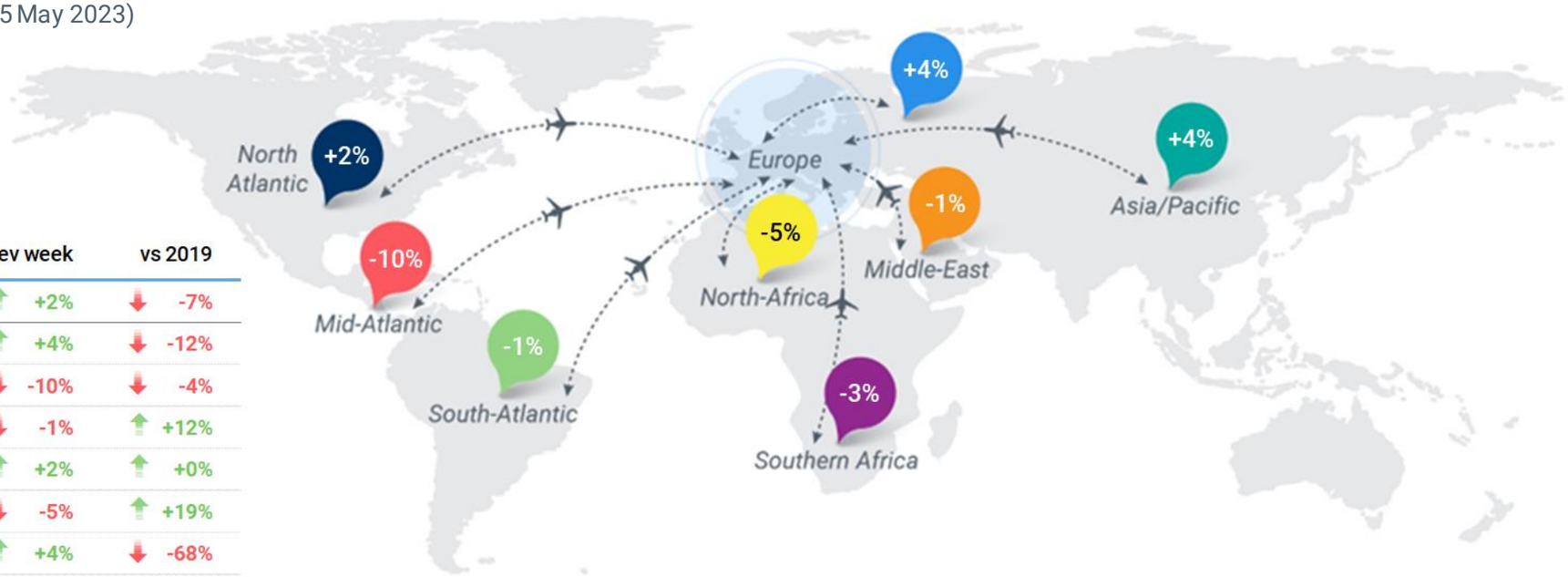
Source: Flightradar24 Historical Global Utilisation data

Over the last week:

- Six European airports are ranked in the Top 25 of global airport departures (same count as in 2022).
- The first European airport (7th) is iGA Istanbul.
- The other European airports in the Top 25 are Amsterdam (9th), CDG (11th), Heathrow (12th), Frankfurt (15th) and Madrid (22nd).
- The first Chinese airport in 2023 is Shenzhen (24th), when none was part of the Top 25 a year ago

Traffic Flows

(average daily departure/arrival flights for week 09-15 May 2023)



Region	Average daily flights	vs prev week	vs 2019
Intra-Europe	23,149	+2%	-7%
Europe ↔ Asia/Pacific	678	+4%	-12%
Europe ↔ Mid-Atlantic	148	-10%	-4%
Europe ↔ Middle-East	1,351	-1%	+12%
Europe ↔ North Atlantic	1,291	+2%	+0%
Europe ↔ North-Africa	1,043	-5%	+19%
Europe ↔ Other Europe	372	+4%	-68%
Europe ↔ South-Atlantic	165	-1%	-9%
Europe ↔ Southern Africa	268	-3%	-6%
Non Intra-Europe	5,317	-1%	-10%

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- The main traffic flow was intra-European with 23,149 daily flights last week, higher (+2%) than in the previous week. Inter-Continental flows recorded 5,317 daily flights on average last week, -1% vs the previous week.
- The second regional flow is between Europe and the Middle-East with 1,351 average daily flights last week, showing a decrease of 1% vs the previous week.
- The third flow is with North America with 1,291 daily flights, slightly higher (+2%) than in the previous week.
- The fourth flow is with North Africa, with 1,043 flights per day, showing a 5% decrease on previous week, owing mainly to a decrease on flows France ↔ Tunisia (shooting attack near a synagogue in Tunisia).
- Flows with Other Europe (incl. Russian Federation) are still lagging behind and were at -68% compared to 2019.
- Flows between Europe and Asia/Pacific are still lagging behind, to a lesser extent, at -12% compared to 2019. European flows with China (incl. Hong-Kong) recorded 169 daily flights on average over 08-15 May 2023.

Top 10 Long Haul Country-Pairs

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

Week 09-15 May 2023

No.	Country pair	Average daily flights	% prev week	% prev year	% 2019
1.	UK ↔ US	318	+2%	+13%	-0%
2.	Germany ↔ US	165	+0%	+1%	-0%
3.	France ↔ US	122	+6%	+10%	+4%
4.	Netherlands ↔ US	82	+4%	+15%	-5%
5.	Italy ↔ US	74	+10%	+10%	-2%
6.	Spain ↔ US	66	+0%	+12%	-8%
7.	Ireland ↔ US	64	-5%	+4%	-5%
8.	UAE ↔ UK	57	+1%	+28%	+28%
9.	Switzerland ↔ US	43	+11%	+37%	+16%
10.	India ↔ UK	38	-1%	+49%	+44%

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- A few changes in the ranking over the previous week for the top 10 Long-haul Country-Pairs: Italy ↔ US and Spain ↔ US outpaced Ireland ↔ US. Russia ↔ UAE exited the top 10 <while India ↔ UK entered it.
- All but two of the flows posted an increase (or remained stable) on previous week (ranging from 0% to 11%).
- Eight of the top 10 Long Haul Country-Pairs are with the US, the main three being between US and UK, Germany and France.
- All flows posted an increase on 2022 (same week).
- Only four flows are now above 2019 levels.
- To be noted: the increase in the number of flights in 2023 on the flow India ↔ US vs 2022 and 2019.

Economics

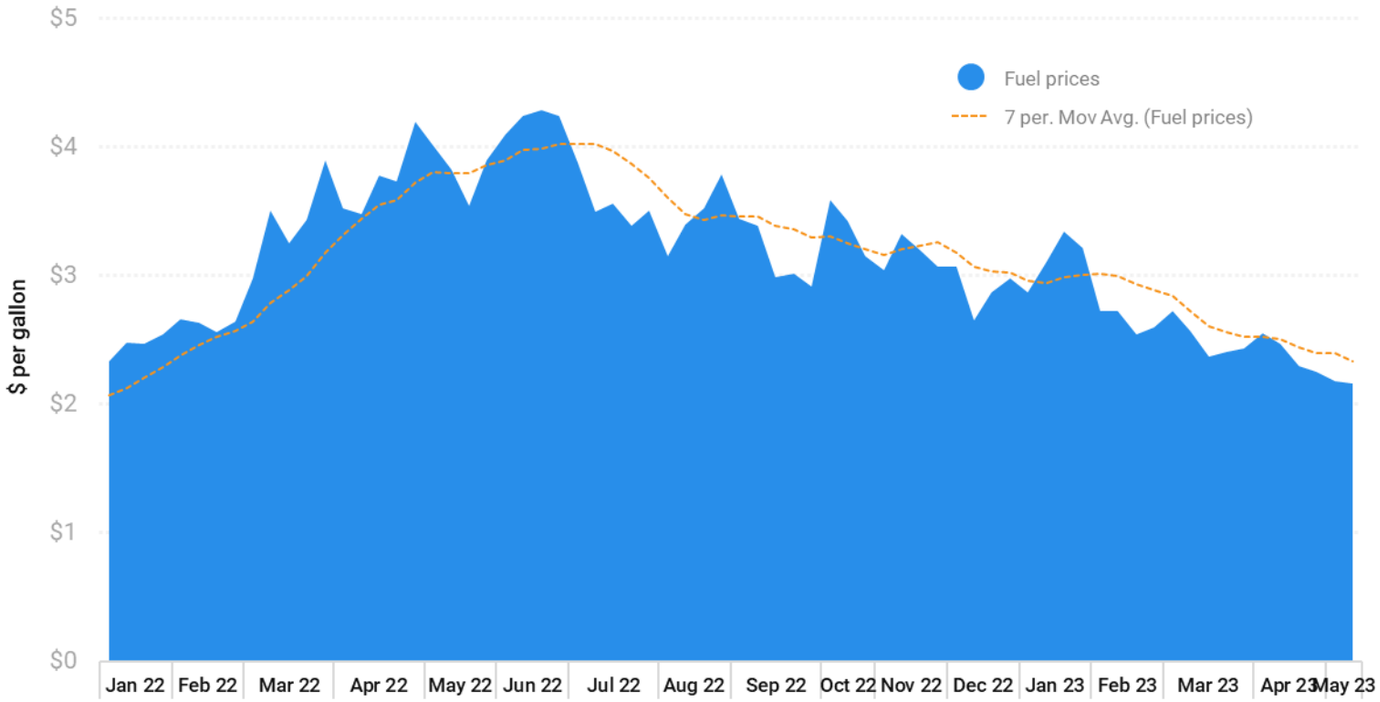
12 May 2023
avg fuel price:

$2.16 /gallon

-4%
vs. $2.25 /gallon
on 28 Apr 2023

Source: IATA/Platts

Jet Fuel Price (Europe)

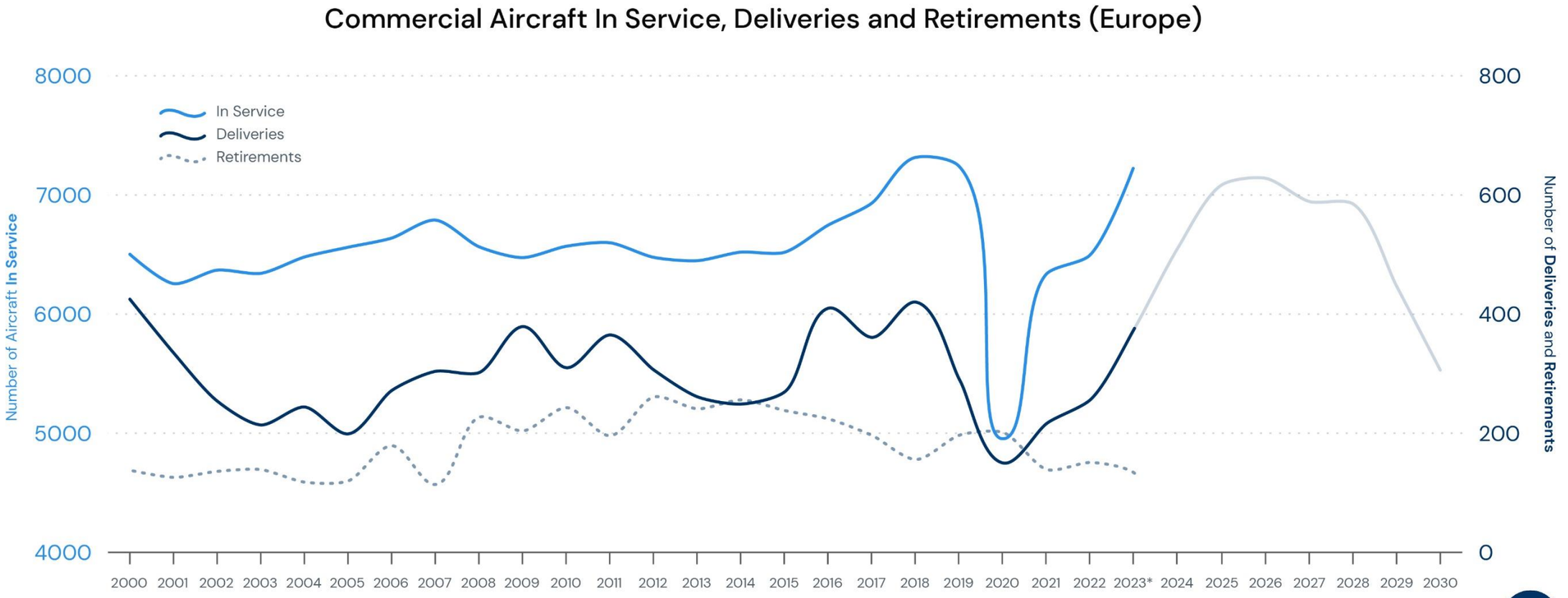


Source: IATA/Platts

- The average price of jet fuel increased to 2.16 USD/gallon on 28 April, it represents a drop of 4% compared to the end of February 2023 and a 21% drop compared to 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 $2.16/gallon mid-May 2023

In-Service Fleet, Orders and Deliveries

Commercial aircraft, Europe (excluding Russia)



*deliveries for 2023 are not actual but YTD delivered + predicted

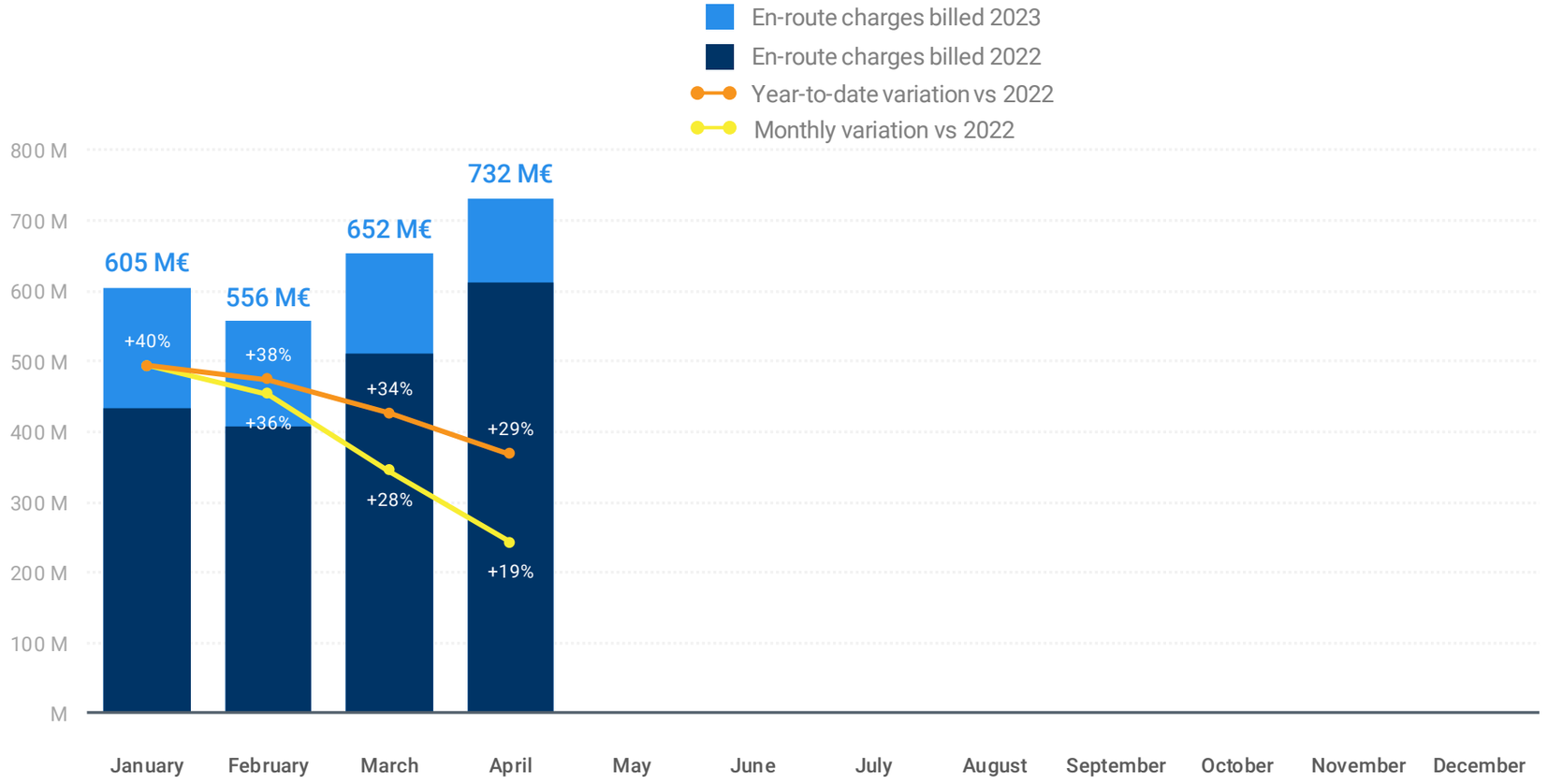
Source: Cirium / STATFOR analysis

Based on information dated 10 May 2023:

- The European in-service fleet in 2023 is expected to surpass the 2018/2019 levels (pre-COVID-19). In-Service fleet figures for 2023 are based on year-to-date information complemented by predicted figures.
- On the right hand-side axis, deliveries are peaking up again, while retirements are levelling off. They are corresponding to 6% and 2% (respectively) of the in-service fleet for 2023.

En-route Air Navigation Charges for the EUROCONTROL Area (2023)

Year-to-date amount billed: 2,547 M€ (+29% vs 2022)



- At network level, 732M€ were billed in March which represents +19% vs 2022 and +13% 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 April 2023 variation vs April 2022 (+19%) is explained by an increase in Unit Rates and an increase in Service Units (+13%).
- Monthly variations in January (+40%) and February (+36%) were artificially inflated by COVID-19 variant (omicron) which impacted growth in service units early 2022. This artificial effect has diminished in March and April.
- The total amount billed in April was higher than during Q1: more days and more seasonal traffic.
- On a year-to-date basis, EUROCONTROL has billed 2,547 M€ which is +29% compared to the same period in 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 7:30 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-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