AVIATION INTELLIGENCE+

EUROCONTROL

EUROPEAN AVIATION OVERVIEW

15 – 21 Mar 2023

Friday 24 March 2023

Headlines

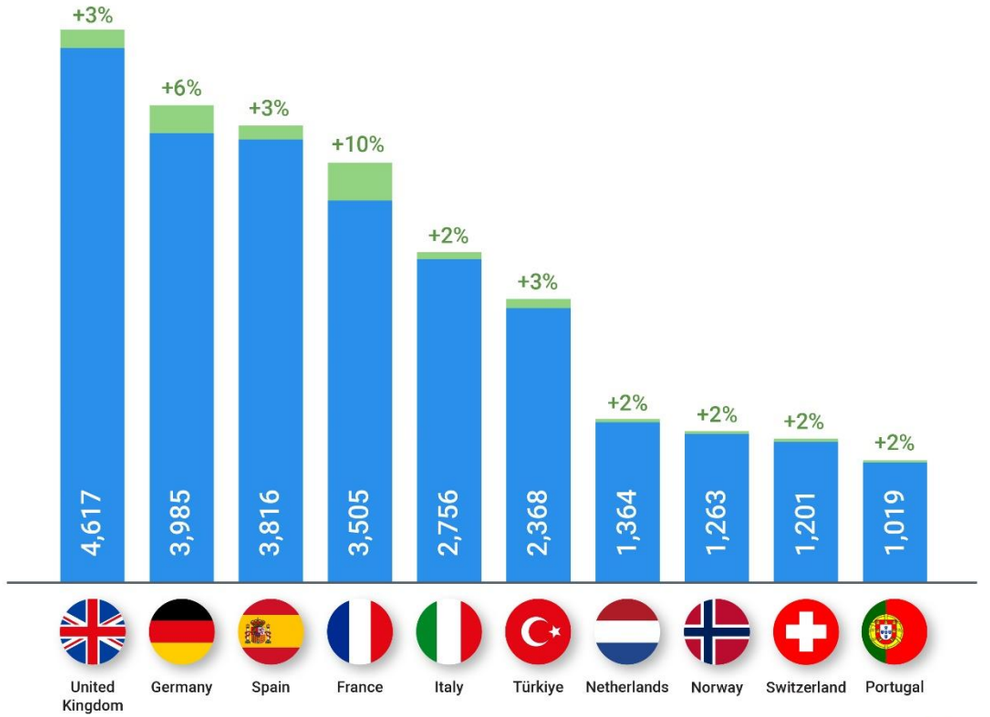
(Week 15-21 March 2023)

- The Network recorded 24,112 average daily flights (+17% vs 2022), slightly increasing (+4%) vs previous week and at 88% of 2019.
- Over the last 2 weeks, network traffic has been affected by industrial actions in France caused by a reform of pension law as well as at some airports, notably in Germany.
- Overall, France represented 77% of all en-route ATFM delays last week and Germany 13%.
- Arrival and Departure punctuality was affected by these en-route ATFM delays but has improved over the last few days.
- All top 10 States have seen an increase of 2% to 10% of their arrival/departures vs previous week.
- All top 10 Aircraft operators experienced a growth between +1% and +8%; Air France and British Airways having the higher growth (+8%) mainly due to a recovery of the traffic after the industrial actions in France.
- Four airlines are much above 2019 levels: Wizz Air (39%), Ryanair (+13%), Turkish Airlines (+6%) and Vueling (+5%).
- The average Jet fuel price fell to 2.37 USD/gallon on 17 March which represents a drop of 7% compared to 17 February 2023 and of 17% compared to the beginning of 2023.

Top 10 Busiest States

On week 15-21 Mar 2023

(all flights incl. overflights compared with previous week)



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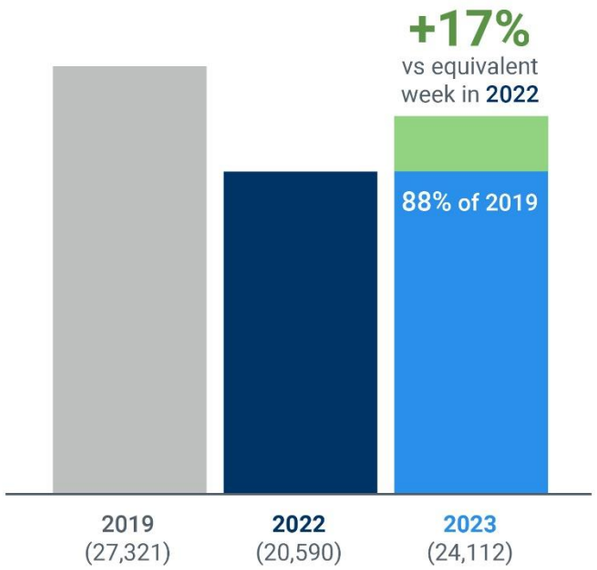
Traffic Situation

Average daily flights (including overflights)

Week 15-21 Mar 2023



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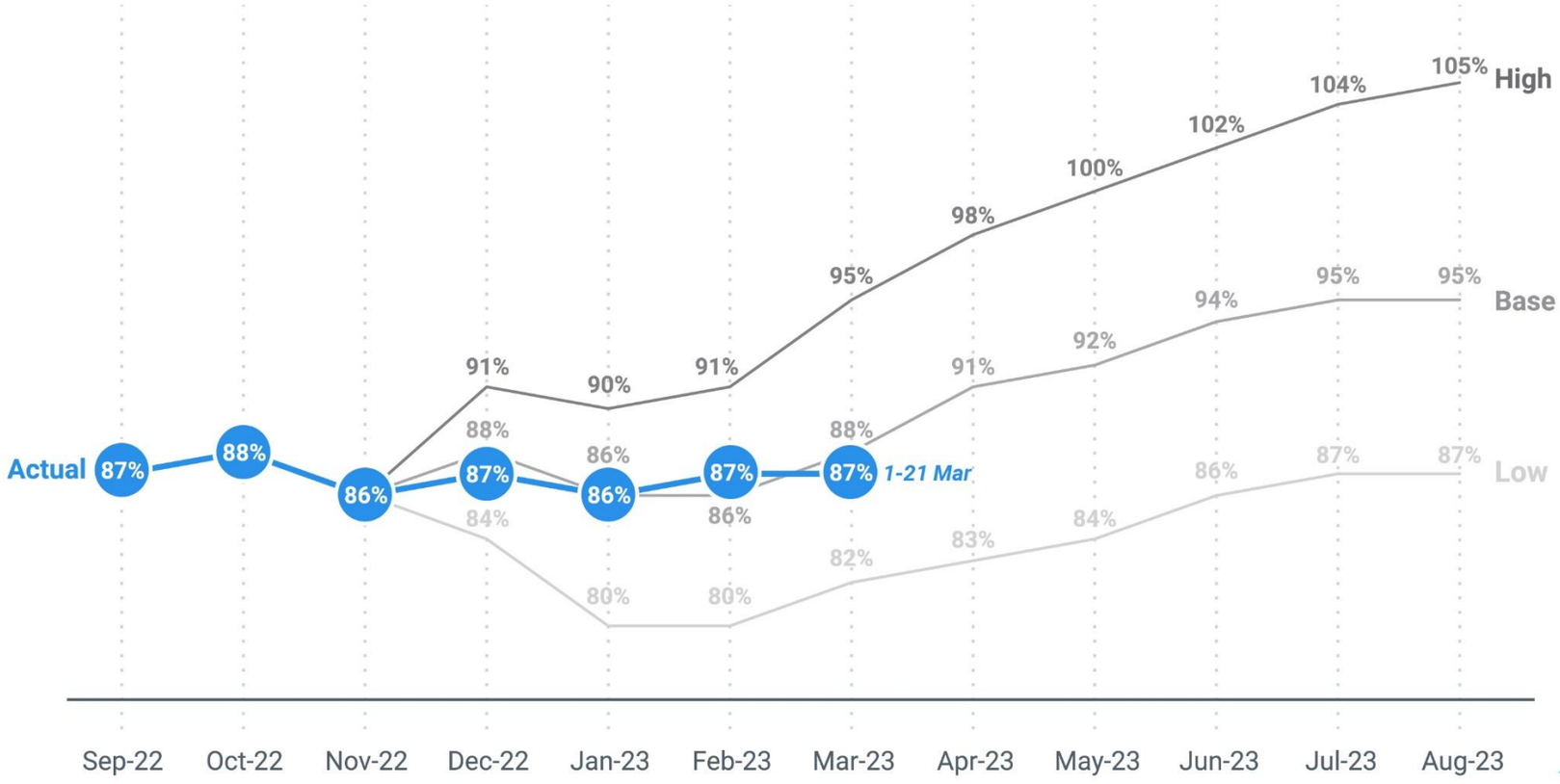
Overall Situation Compared to the EUROCONTROL Traffic Scenarios

(base year 2019)



Publication date: December 2022

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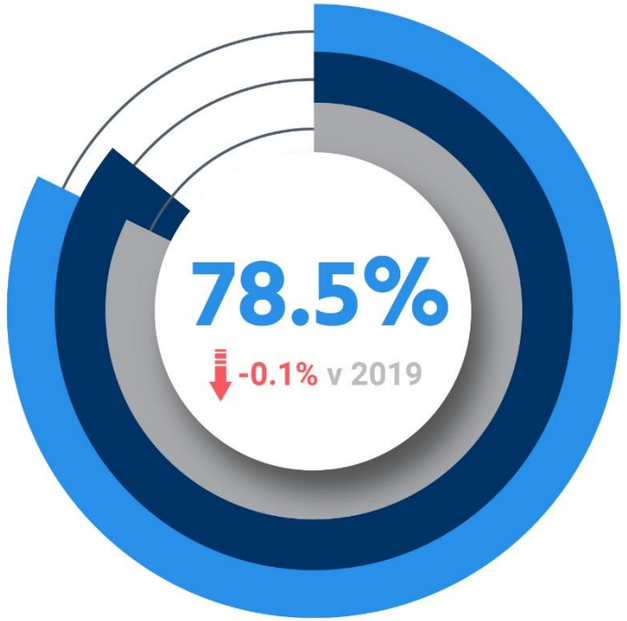
- The latest EUROCONTROL Traffic scenarios were published on 16 December 2022.
- Since that date, network traffic has evolved around the base scenario.
- This is also confirmed for the first 21 days of March which shows 87% of 2019 so far.
- A detailed analysis of the schedules in the Rolling NOP shows that April should also be close to the base scenario (i.e. 91%).
- On a year-to-date basis, network is at 87% of 2019 and +22% vs 2022.

Arrival & Departure Punctuality

(at top airports for the last week)

Week 15-21 Mar 2023

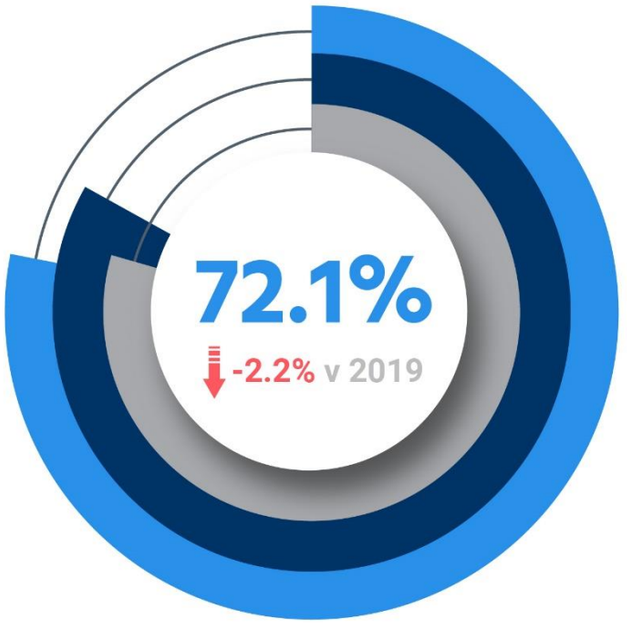
ARRIVAL PUNCTUALITY



78.6% _____ in 2019

83.8% _____ in 2022

DEPARTURE PUNCTUALITY



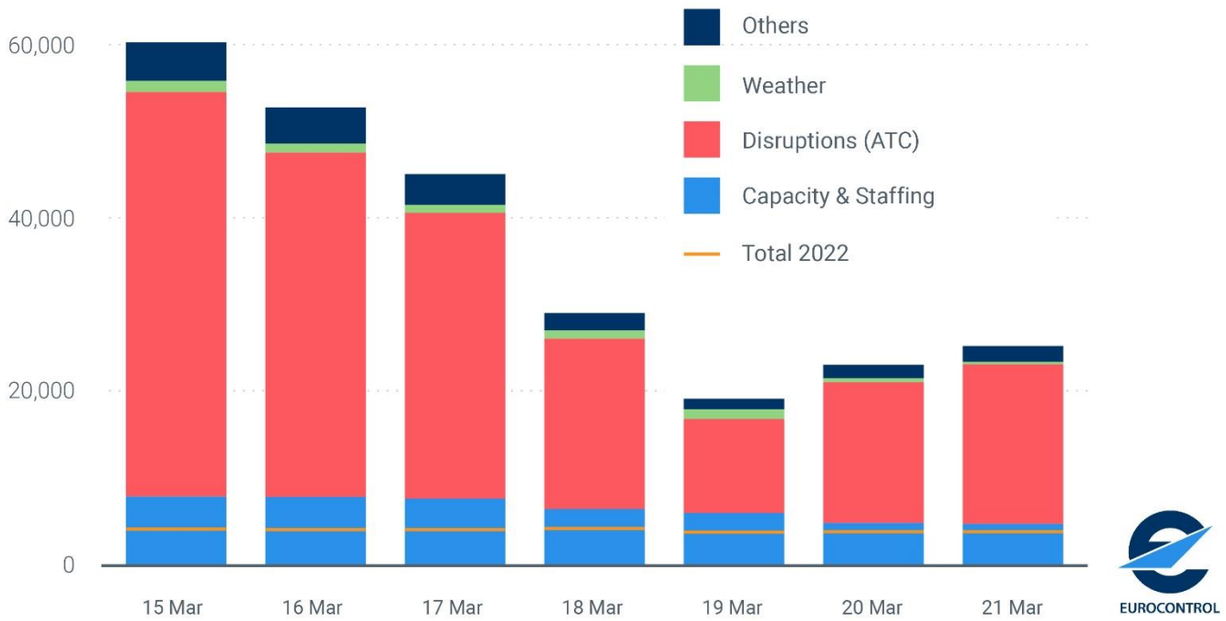
74.3% _____ in 2019

79.8% _____ in 2022

- Arrival punctuality is close to 2019 levels over last week while departure punctuality is worse due to the recent en-route ATFM delays in the network. Both arrival and departure punctuality are significantly worse than last year, mainly due also to the increase of traffic.
- Punctuality fell as long-term French industrial action continued to influence network performance throughout the week.
- Industrial action also occurred in Greece on the 16 March, the main effect being cancellations on flights to and from Greek airports.
- Weather mainly snow affected Frankfurt Main. Lisbon airport suffered from low visibility and capacity delays. Istanbul Sabiha Gokcen experienced delays due to high winds and convective weather. London Gatwick saw capacity delays due to ATC staffing on 19 March.

En-Route ATFM Delays

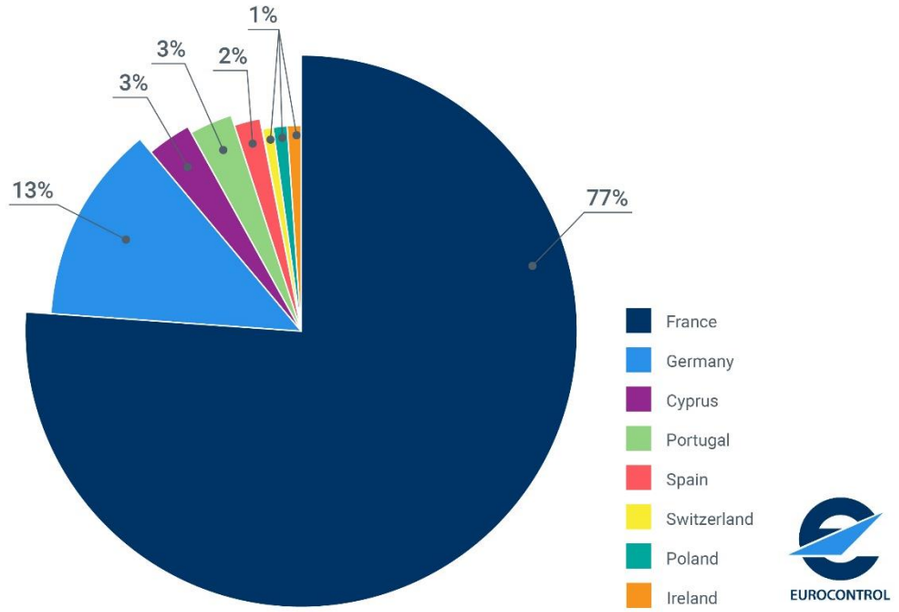
Delays per cause (EUROCONTROL Area)
in minutes (7-day average) in 2023



- En-route ATFM delays have been constantly higher than in 2022.
- This is mainly due to industrial actions in France caused by a reform of pension law which have caused disruptions in the network over several days early 2023 but more severely from 7 to 12 March, 15 March and since 20 March.

Share of en-route ATFM delays

Week 15-21 Mar 2023



- For these reasons, France represented 77% of all en-route ATFM delays over last week and up to 81% over the previous week.
- Germany comes second with 13% of all en-route ATFM delays, mainly concentrated in Bremen ACC.

Top 10 Countries

Dep/Arr to the equivalent week in 2019

Week 15-21 Mar 2023

No.	Country	Average daily flights	% prev week	% prev year	% 2019
1.	United Kingdom	4,617	+3%	+22%	-14%
2.	Germany	3,985	+6%	+14%	-24%
3.	Spain	3,816	+3%	+16%	-1%
4.	France	3,505	+10%	+7%	-11%
5.	Italy	2,756	+2%	+17%	-9%
6.	Türkiye	2,368	+3%	+34%	+6%
7.	Netherlands	1,364	+2%	+7%	-13%
8.	Norway	1,263	+2%	+10%	-10%
9.	Switzerland	1,201	+2%	+18%	-9%
10.	Portugal	1,019	+2%	+18%	+10%

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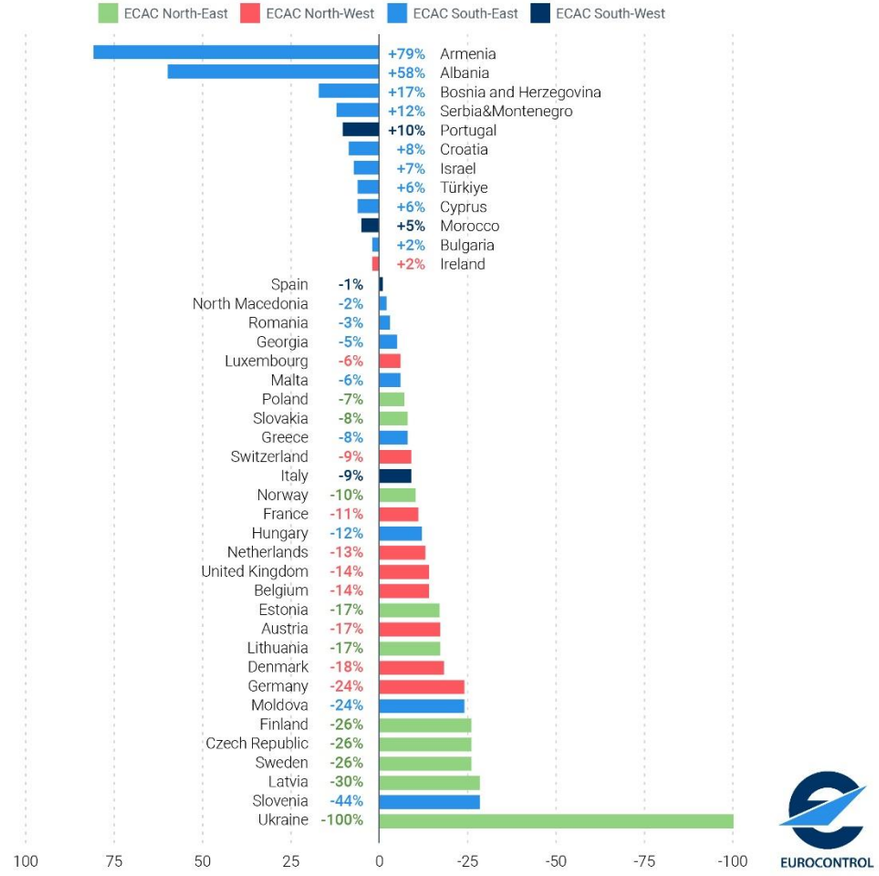
- No change in the ranking over the previous week which experienced a growth of around +2%.
- France and Germany presented growths (respectively +10% and +6%) which are artificially higher due to the lower traffic 2 weeks ago because of strikes. Both domestic traffic recovered over the last week.
- Two countries are above 2019 (Türkiye and Portugal) with Spain very close to 2019 level. All other States are around -10% with the exception of Germany which is lagging behind (-24%) with a low level of internal traffic.

States in the EUROCONTROL Network

Compared to the equivalent week in 2019

Dep/Arr Flights for Week 15-21 Mar 2023



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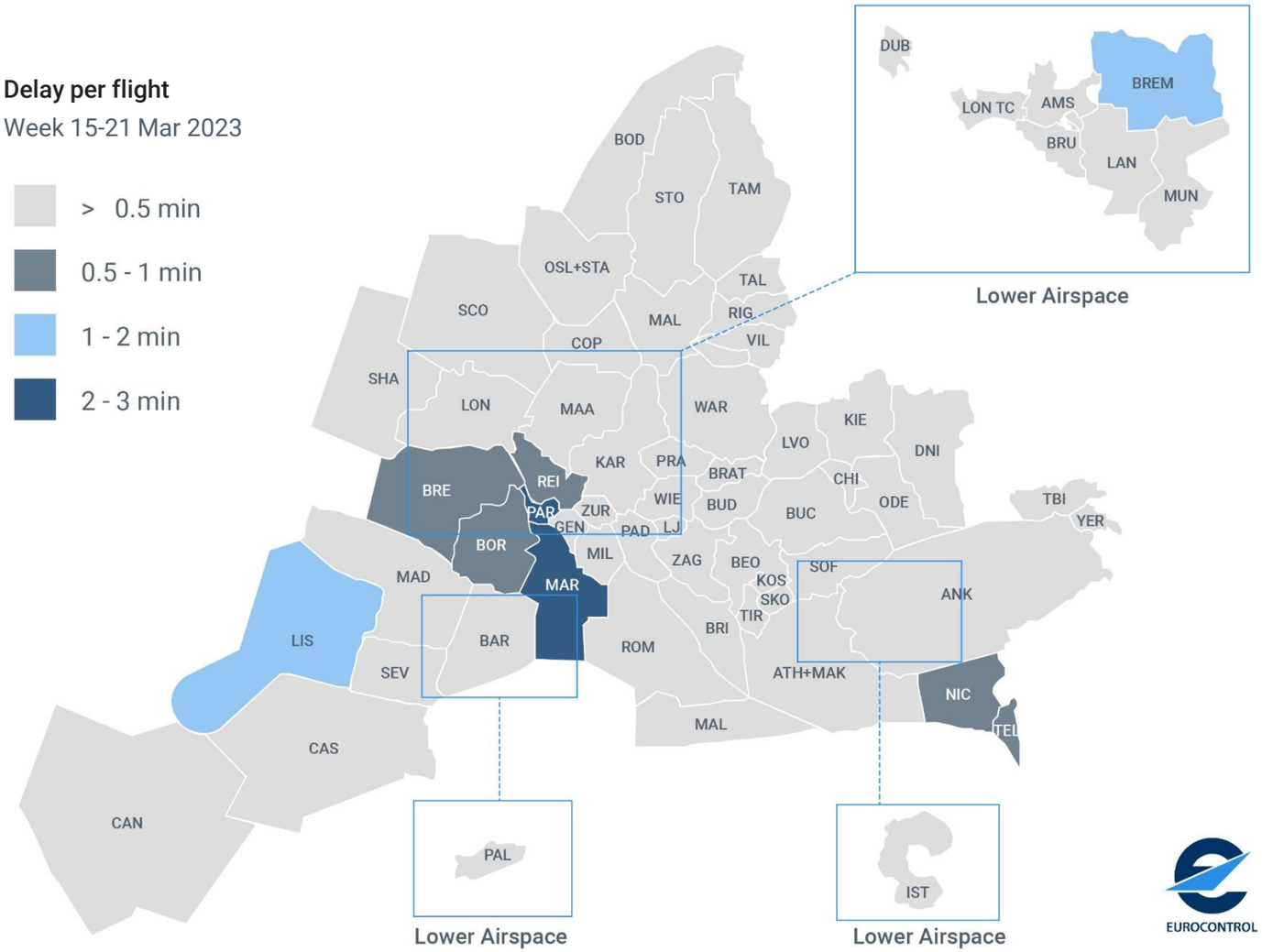
En-Route ATFM delayed flight per Area Control Centre



- Over the last few weeks, en-route ATFM delays have risen significantly and are above 2022 levels.
- The main reason is related to industrial actions in a number of States, mainly in France, but also more locally at some airports like at German airports. Weather conditions also impacted some States like Portugal.
- The most affected ACCs were Paris (2.97 min/flight), Marseille (2.77), Lisboa (1.03), Bremen (1.01), Reims (0.96) and Brest (0.79).
- Overall, France was responsible for 77% of all en-route ATFM delays last week, followed by Germany (13%) and Cyprus and Portugal (3% each).

Top 10 Aircraft Operators

Week 15-21 Mar 2023 (avg daily flights)

No.	Country	Average daily flights	% prev week	% prev year	% 2019
1.	Ryanair Group	2,181	+1%	+3%	+13%
2.	Turkish Airlines	1,313	+2%	+34%	+6%
3.	easyJet Group	1,268	+5%	+12%	-18%
4.	Lufthansa Airlines	1,046	+3%	+28%	-31%
5.	Air France Group	912	+8%	+7%	-22%
6.	British Airways Group	774	+8%	+35%	-14%
7.	KLM Group	704	+4%	+13%	-8%
8.	Wizz Air Group	644	-1%	+48%	+39%
9.	SAS Group	598	+2%	+25%	-33%
10.	Vueling	513	+5%	+36%	+5%

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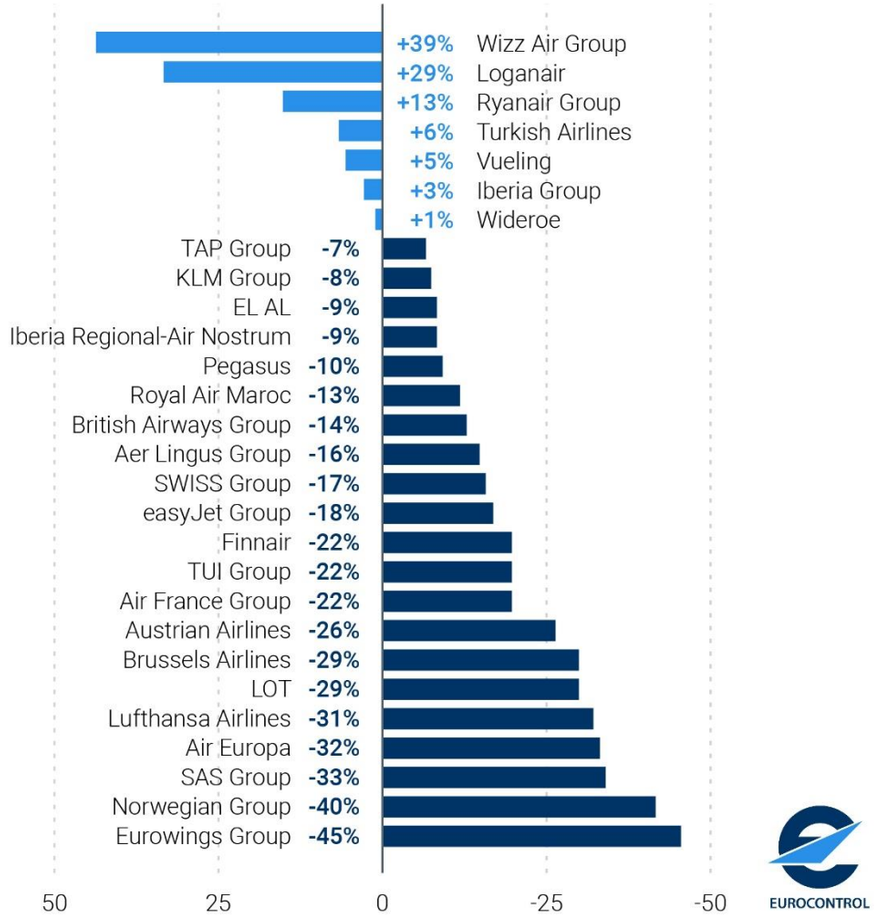
- No change in the ranking over the previous week for the top 10 Aircraft operators which all experienced a growth between +1 and +8%.
- Air France and British Airways presented a higher growth (+8%) mainly due to a recovery of the traffic after the industrial actions in France.
- Only Wizz Air is decreasing vs the previous week, mainly due to lower flows with Moldova last week.
- Four airlines within the top 10 exceeded their 2019 volumes (flights): Wizz Air (39%), Ryanair (+13%), Turkish Airlines (+6%) and Vueling (+5%).

Aircraft Operators in the EUROCONTROL Network

Compared to the equivalent week in 2019

Dep/Arr Flights for Week 15-21 Mar 2023



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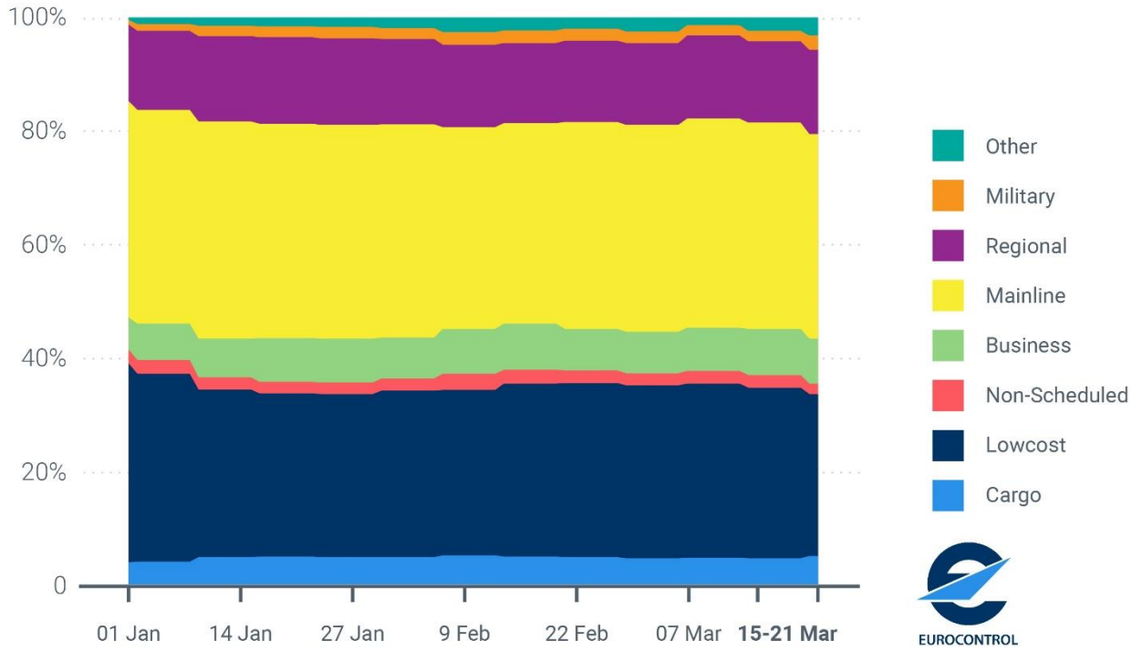
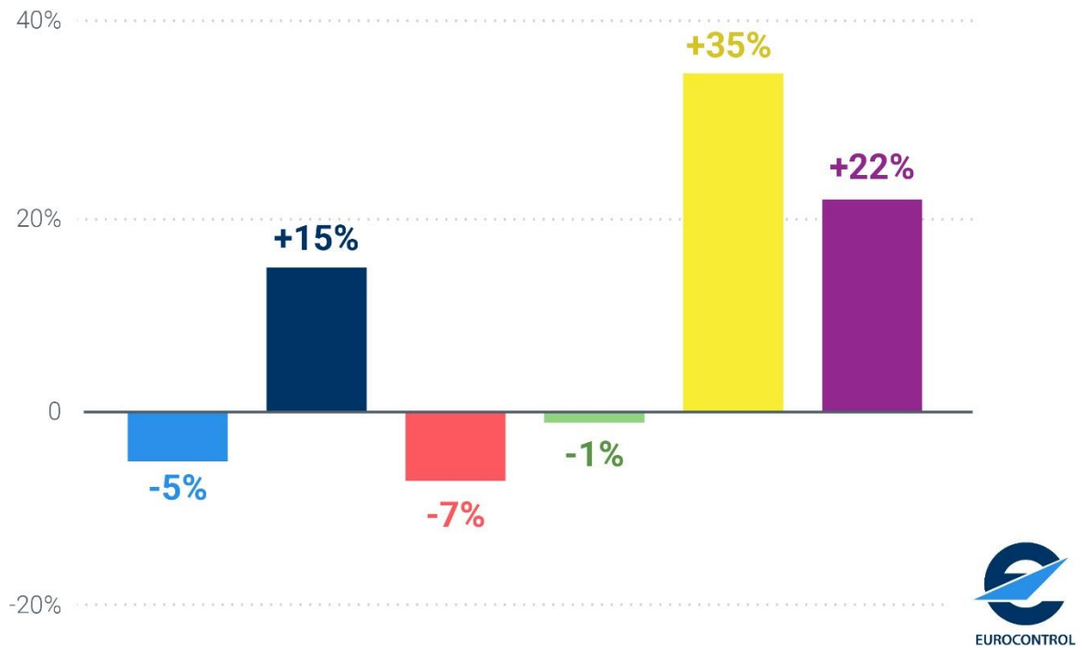
Market Segments in the EUROCONTROL Network

7-day average flights compared with 2022



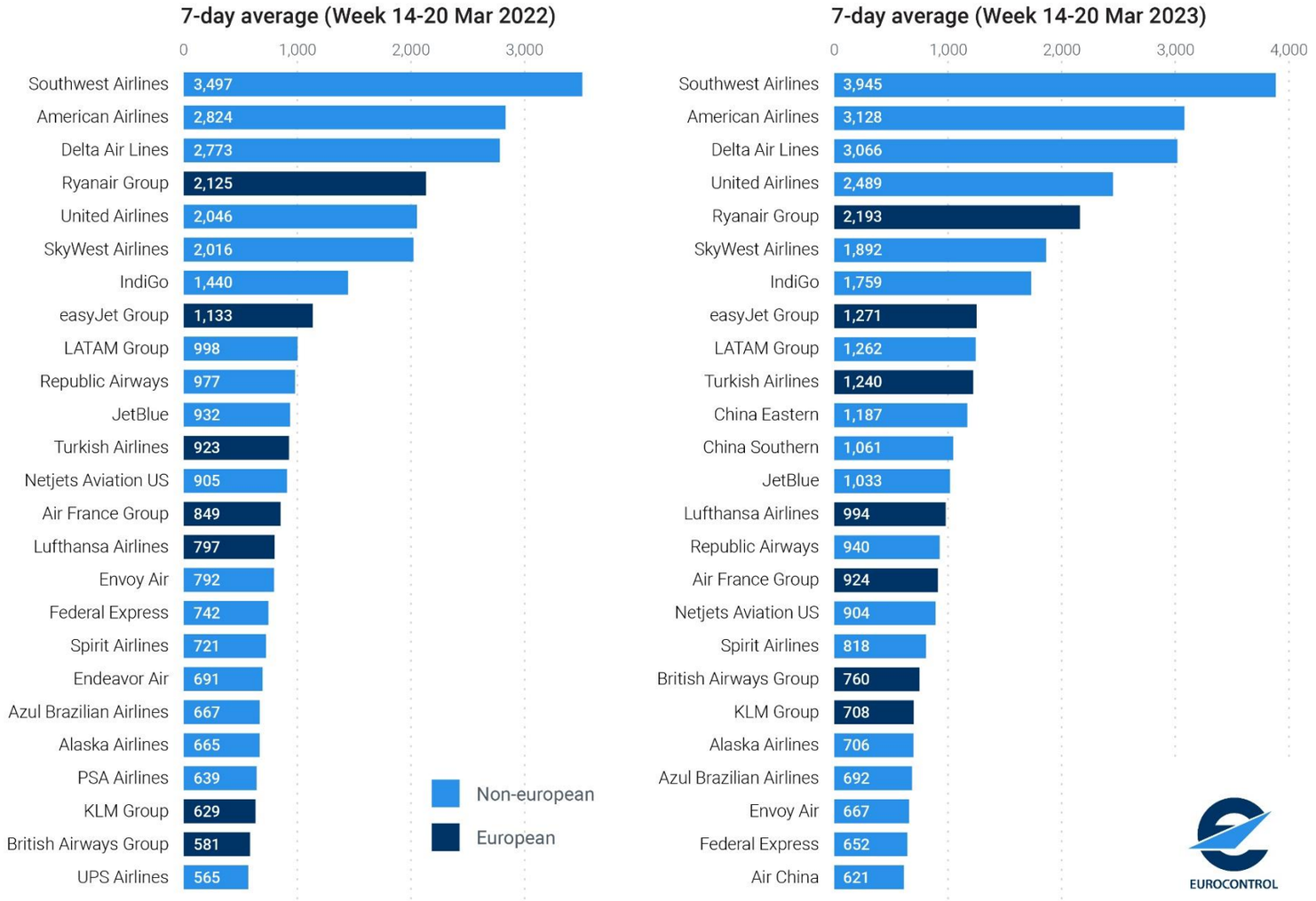
Week 15-21 Mar 2023 (vs 2022)



- Compared to 2022, Low-Cost (+15%), Mainline (+35%) and Regional (+22%) are recording sustained growth rates compared to last year owing to the continuous recovery and to the low levels of traffic in 2022 (after Omicron's wave from mid-January).
- Business Aviation (-1%) and all-cargo (-5%) are recording fewer flights in 2023 compared to 2022 levels, recovery is levelling off.
- Charter (-7%) is below the 2022 levels, partly explained by the impact of Russia's aggression war against Ukraine (some flows were reduced since end February 2022).

Top 25 Global Aircraft Operators

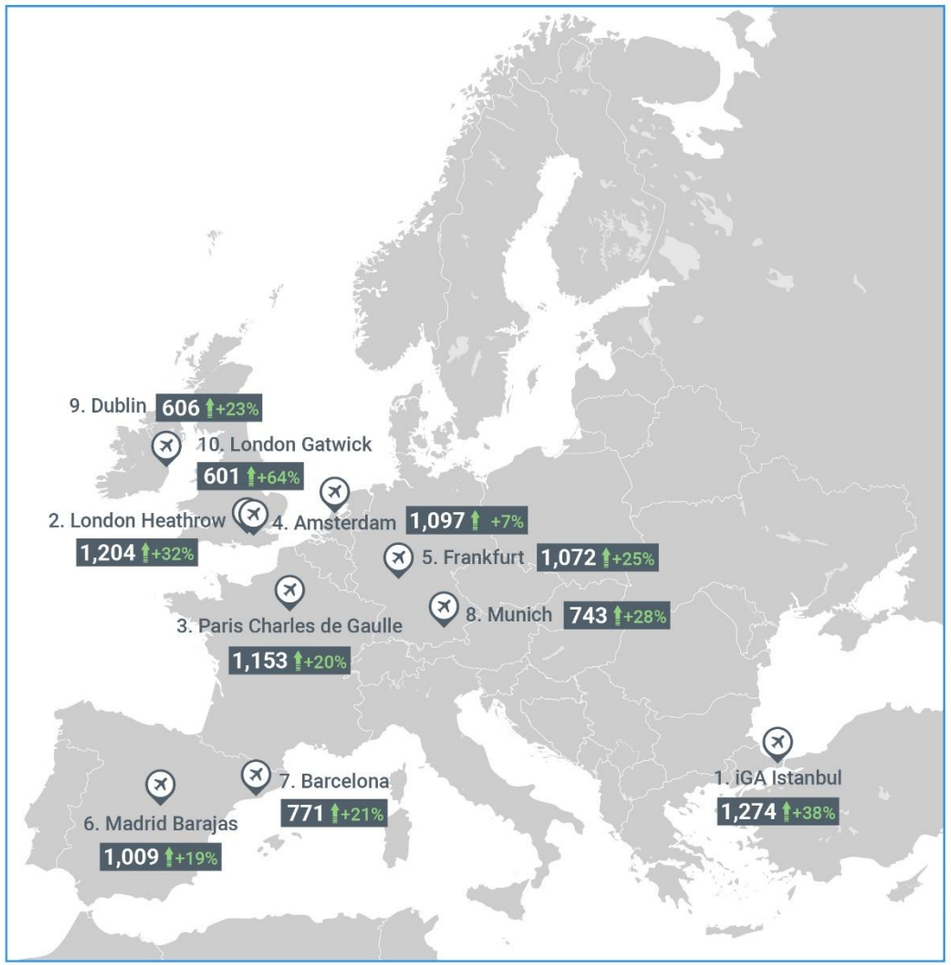
(average daily departure flights)



Over the last week:

- 7 European airlines are ranked in the Top 25 global aircraft operators (like in 2022).
- The first European aircraft operator (5th) is Ryanair.
- The other European airlines in the Top 10 are easyJet (8th) and Turkish Airlines (10th).
- To be noted the progression of KLM and British Airways in the ranking between 2022 and 2023.

Top 10 Airports



Airport Ranking

Week 15-21 Mar2023 (vs 2019)

No.	Airport City	Average Daily Dep/Arr Flights	vs 2022	vs 2019
1.	iGA Istanbul	1,274	+38%	n/a
2.	London Heathrow	1,204	+32%	-7%
3.	Paris Charles de Gaulle	1,153	+20%	-11%
4.	Amsterdam	1,097	+7%	-16%
5.	Frankfurt	1,072	+25%	-22%
6.	Madrid Barajas	1,009	+19%	-8%
7.	Barcelona	771	+21%	-7%
8.	Munich	743	+28%	-33%
9.	Dublin	606	+23%	+2%
10.	London Gatwick	601	+64%	-17%

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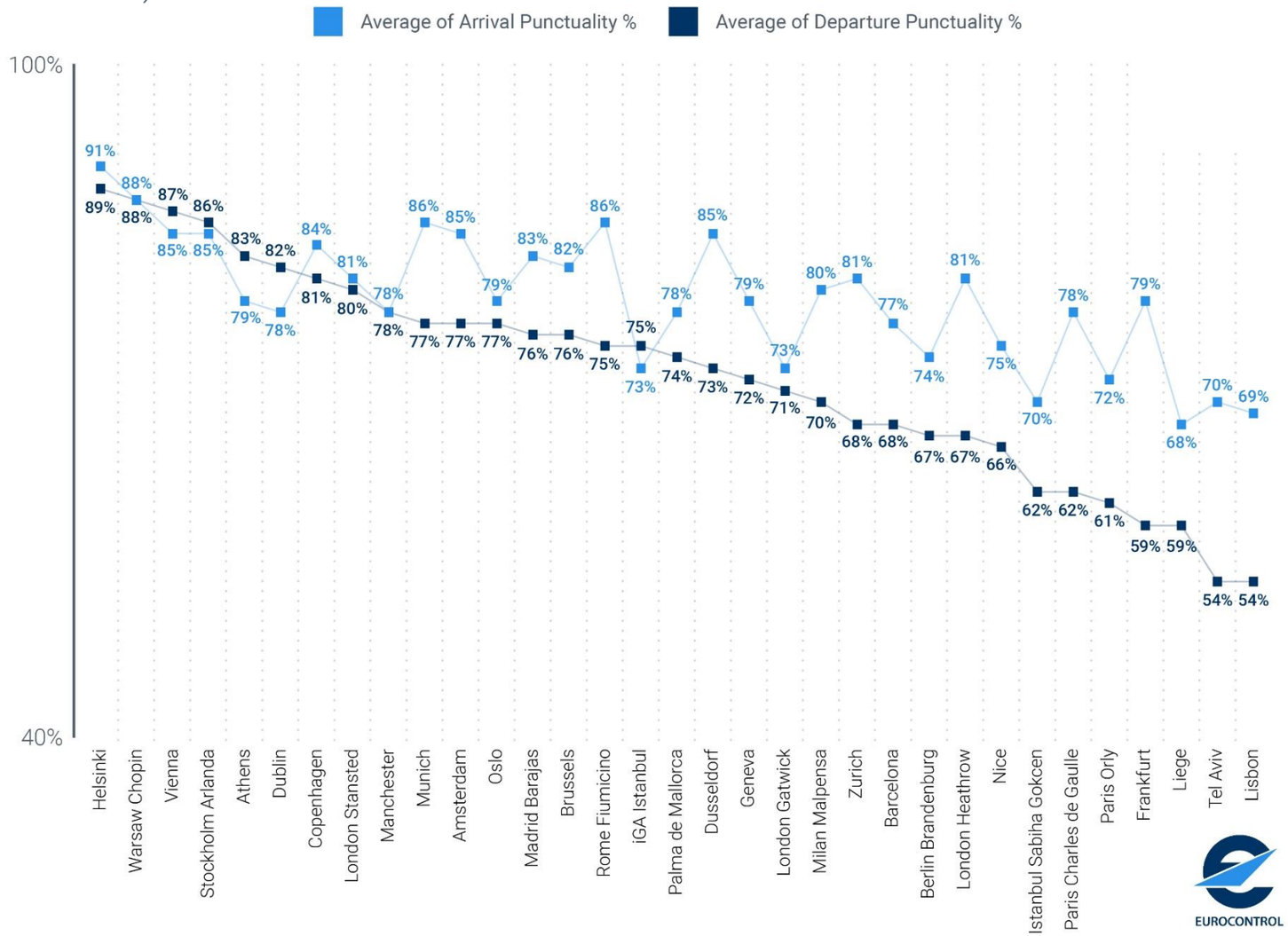
- A few changes in the ranking over the previous week: increase for Barcelona and Dublin and decrease for Munich and Gatwick.
- Most airports experienced an increase by +2% to +7% with the exception of iGA Istanbul, Munich and Dublin which remained stable.
- One airport (Dublin) is above 2019 level, while German airports have the lowest situation (Frankfurt and Munich with resp. -16% and -33%). CDG and Amsterdam follow with -11% and -16%.

Average Arr/Dep Punctuality at Main Airports

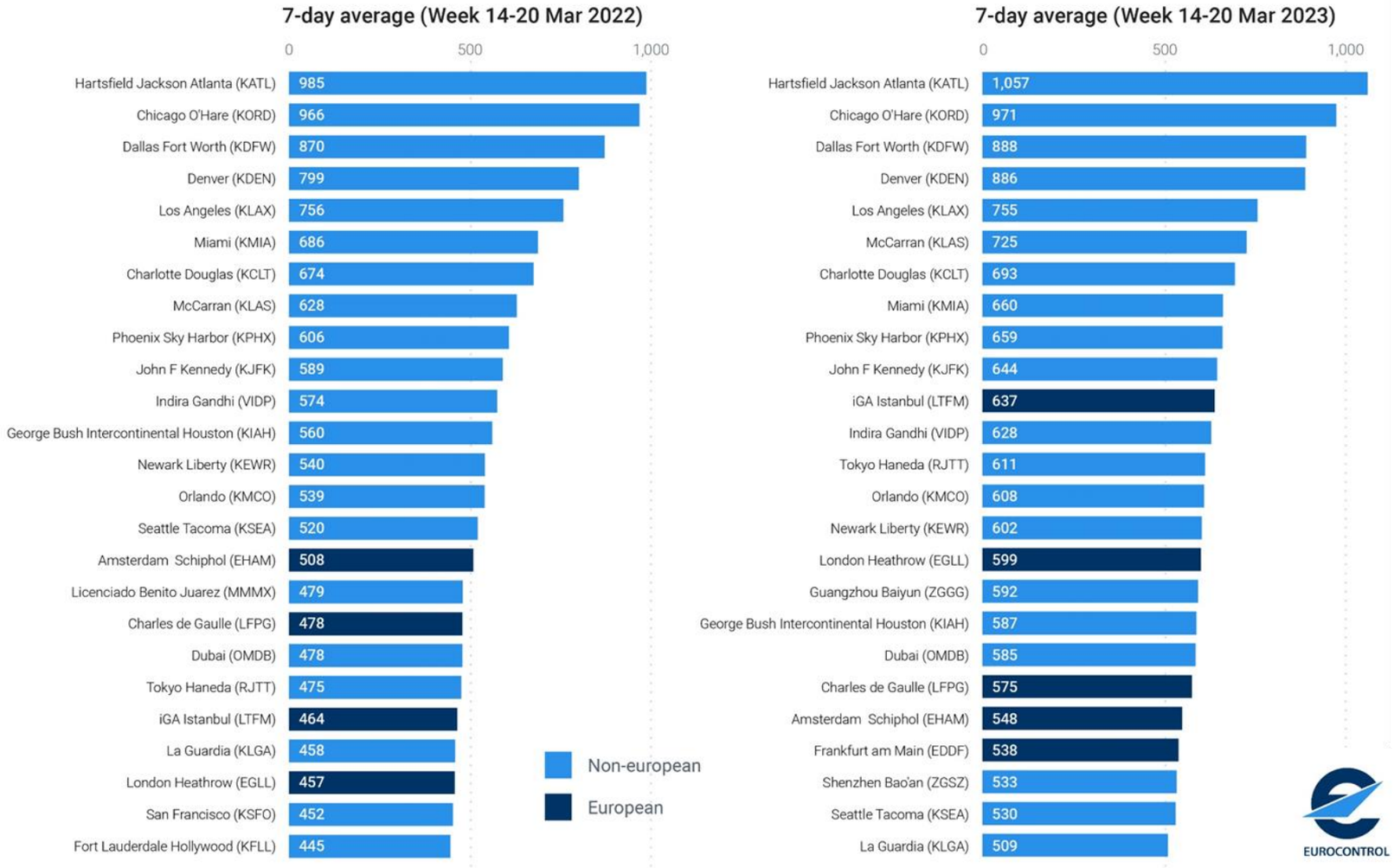
(Week 15-21 Mar 2023)



- After having deteriorated early March because of significant en-route ATFM delays related to industrial actions in France, both arrival and departure punctuality are now improving even if still worse than in 2022.
- At most airports, arrival punctuality is higher (i.e. better) than departure punctuality.
- However, it must be noted that at a few airports, notably iGA Istanbul, Dublin, Athens, Stockholm and Vienna, departure punctuality is higher than arrival punctuality which indicates that these airports have been able to absorb delays.
- The low value for Lisbon airport is due to the fact that the airport suffered from low visibility and capacity delays.

Top 25 Global Airport Departures

(average daily departure flights)



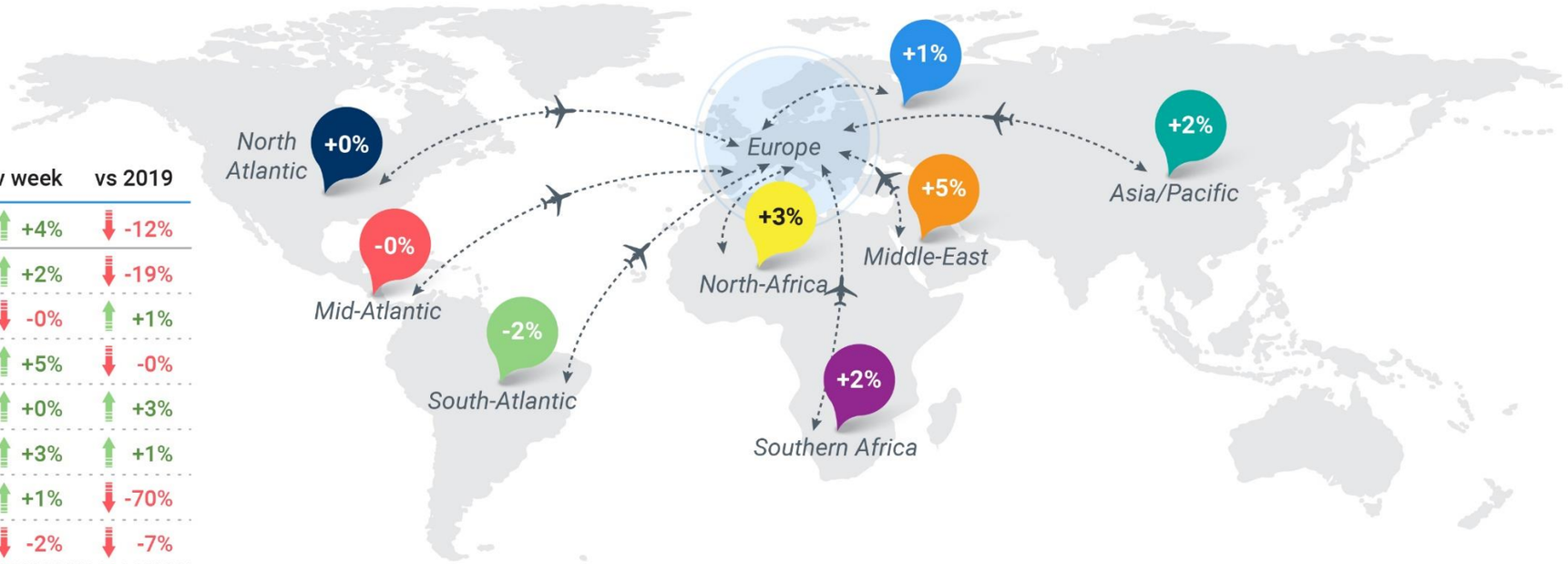
Over the last week:

- 5 European airports are ranked in the Top 25 global aircraft operators (they were 4 in 2022).
- The first European airport (11th) is iGA Istanbul.
- The other European airports in the Top 25 are Heathrow (16th), CDG (20th), Amsterdam (21st) and Frankfurt (22nd). Madrid is 26th.

Traffic Flows

(average daily departure/arrival flights for week 15-21 Mar 2023)

Region	Average Daily Flights	vs prev week	vs 2019
Intra-Europe	**18,507**	+4%	-12%
Europe ◂ ▸ Asia/Pacific	629	+2%	-19%
Europe ◂ ▸ Mid-Atlantic	189	-0%	+1%
Europe ◂ ▸ Middle-East	1,326	+5%	-0%
Europe ◂ ▸ North Atlantic	1,003	+0%	+3%
Europe ◂ ▸ North-Africa	961	+3%	+1%
Europe ◂ ▸ Other Europe	239	+1%	-70%
Europe ◂ ▸ South-Atlantic	159	-2%	-7%
Europe ◂ ▸ Southern Africa	305	+2%	-4%
Non Intra-Europe	**4,812**	+2%	-13%



- The main traffic flow was intra-European with 18,507 daily flights last week, +4% vs previous week. Inter-Continental flows recorded 4,812 daily flights on average last week, +2% vs previous week.
- The second regional flow is between Europe and Middle-East with 1,326 average daily flights last week, showing an increase of +5% vs previous week.
- The third flow is with North America with 1,003 daily flights, stable over previous week.
- Flows with Other Europe (incl. Russian Federation) are still lagging behind for obvious reasons and were at -70% compared to 2019.
- Flows between Europe and Asia/Pacific are also still lagging behind, to a lesser extent, at -19% compared to 2019, slowly recovering (+2% vs previous week). The progressive reopening of traffic with China should improve the situation there.

Top 10 Long Haul Country-Pairs

(average daily departure/arrival flights for the last week)
Week 15-21 Mar 2023

Country pair	Average daily flights	% prev week	% prev year	% 2019
United Kingdom ◂ ▸ United States	266	-0%	+40%	-0%
Germany ◂ ▸ United States	146	-1%	+21%	-3%
France ◂ ▸ United States	100	+1%	+21%	+7%
Netherlands ◂ ▸ United States	63	+3%	+13%	-4%
United Arab Emirates ◂ ▸ United Kingdom	57	-0%	+23%	-9%
Ireland ◂ ▸ United States	52	+1%	+29%	+11%
Spain ◂ ▸ United States	49	+3%	+21%	+3%
Russian Federation ◂ ▸ United Arab Emirates	46	+1%	+151%	+1229%
India ◂ ▸ United Kingdom	42	+0%	+80%	+11%
Italy ◂ ▸ United States	42	+6%	+38%	+15%

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- No change in the ranking over the previous week for the top 10 Long-haul Country-Pairs which all experienced a growth between 0% and 6%.
- 7 of the top 10 Long Haul Country-Pairs are with the US, the main three being between US and UK, Germany and France.
- The flow between Italy and the US showed the highest increase (+6%).
- Most of the flows are getting close to 2019 when they are not yet above.
- To be noted the increase of traffic between the Russian Federation and United Arab Emirates vs 2022 and 2019.

Economics

Week 15-21 Mar 2023

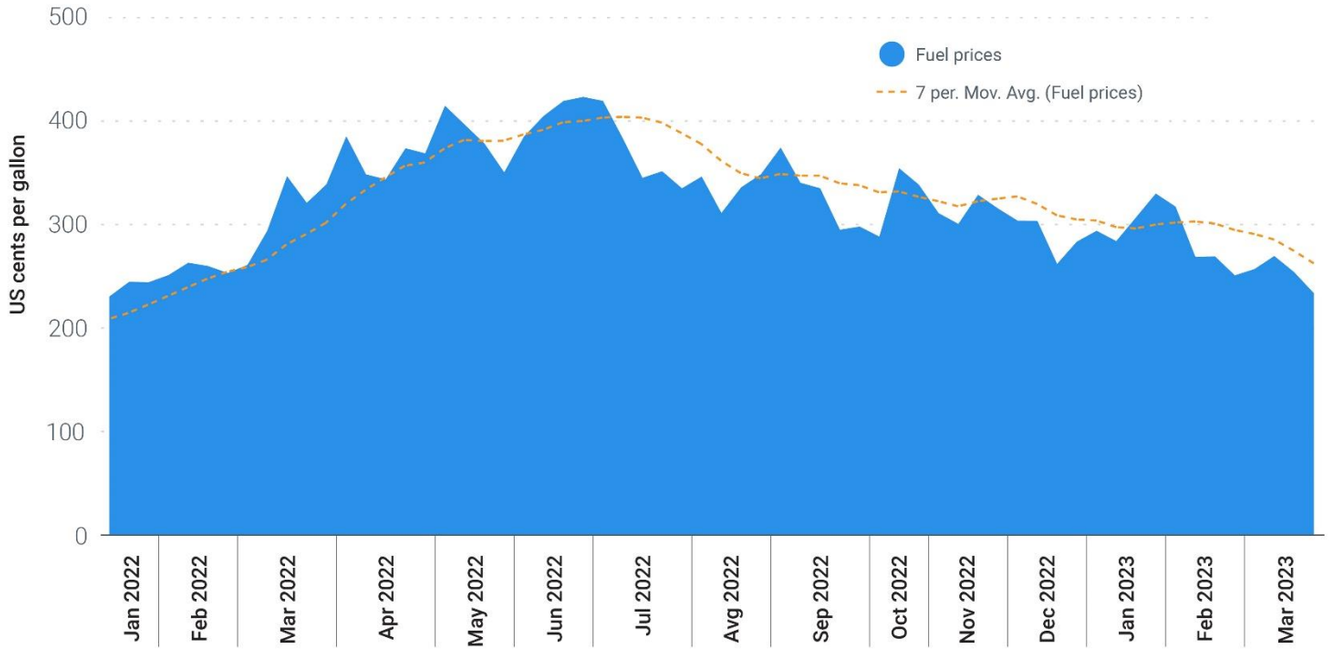
17 Mar 2023
avg fuel price:

$2.37 /gallon

-7%
vs. $2.54 /gallon
on 17 Feb 2023

Source: IATA/Platts

Jet Fuel Price (Europe)



Source: IATA/Platts

- The average Jet fuel price fell to 2.37 USD/gallon on 17 March.
- This represents a drop of 7% compared to 17 February 2023 and of 17% compared to the beginning of 2023.

GDP in the European Union

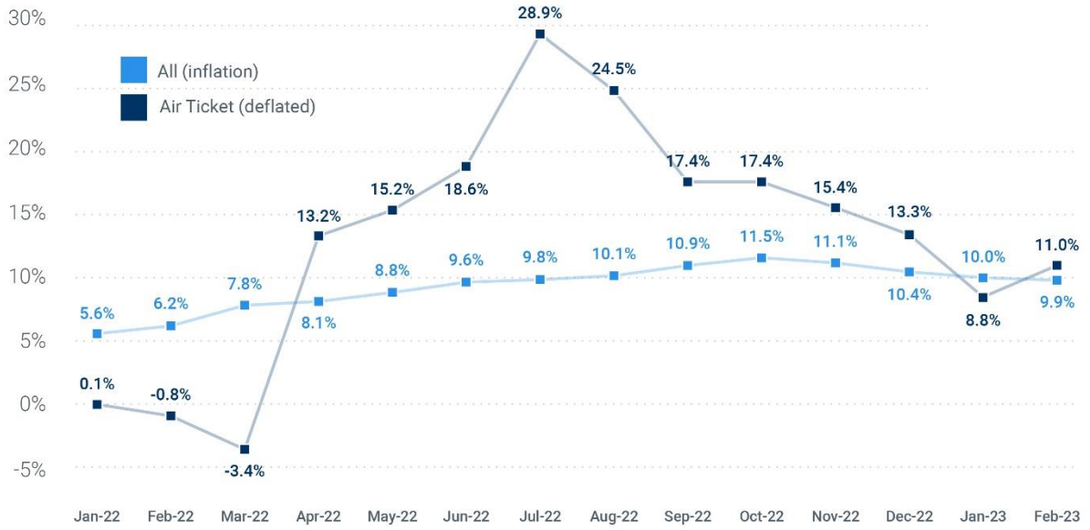
Constant prices and exchange rate, Euro

Source: Oxford Economics Ltd.

- According to the latest GDP forecast from Oxford Economics, the evolution of GDP should revert to growth in Q2 2023 (vs Q2 2022) and the rate should climb up to +0.6% in Q4 2024 (vs Q4 2023).
- In terms of index with 2019 as base 100, 2023 should be at 103 and 2024 at 105.

Price Change per Month (EU27)

For year 2022



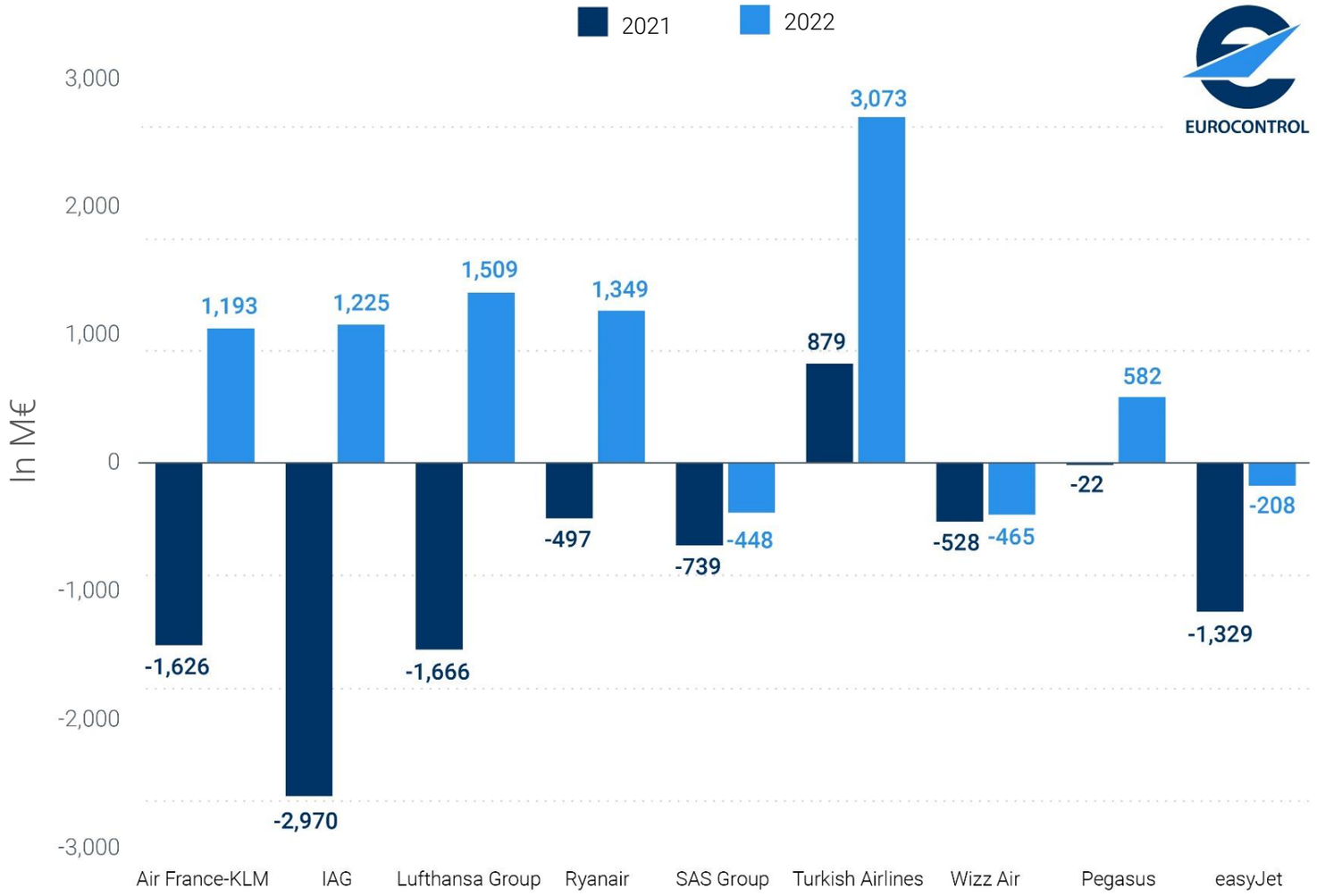
Source: EUROSTAT

The latest information from EUROSTAT show the following:

- In 2022, air ticket prices have increased by 16% compared to 2021 (peaking at +29% in July 2022).
- In Jan-Feb 2023, Ticket prices have increased by 10% on average, in line with all-prices inflation.
- This reflects inter alia sustained demand, reduced flight choice, and higher jet fuel prices.

Operating Profits of Airlines

In M€ in 2022 and 2021



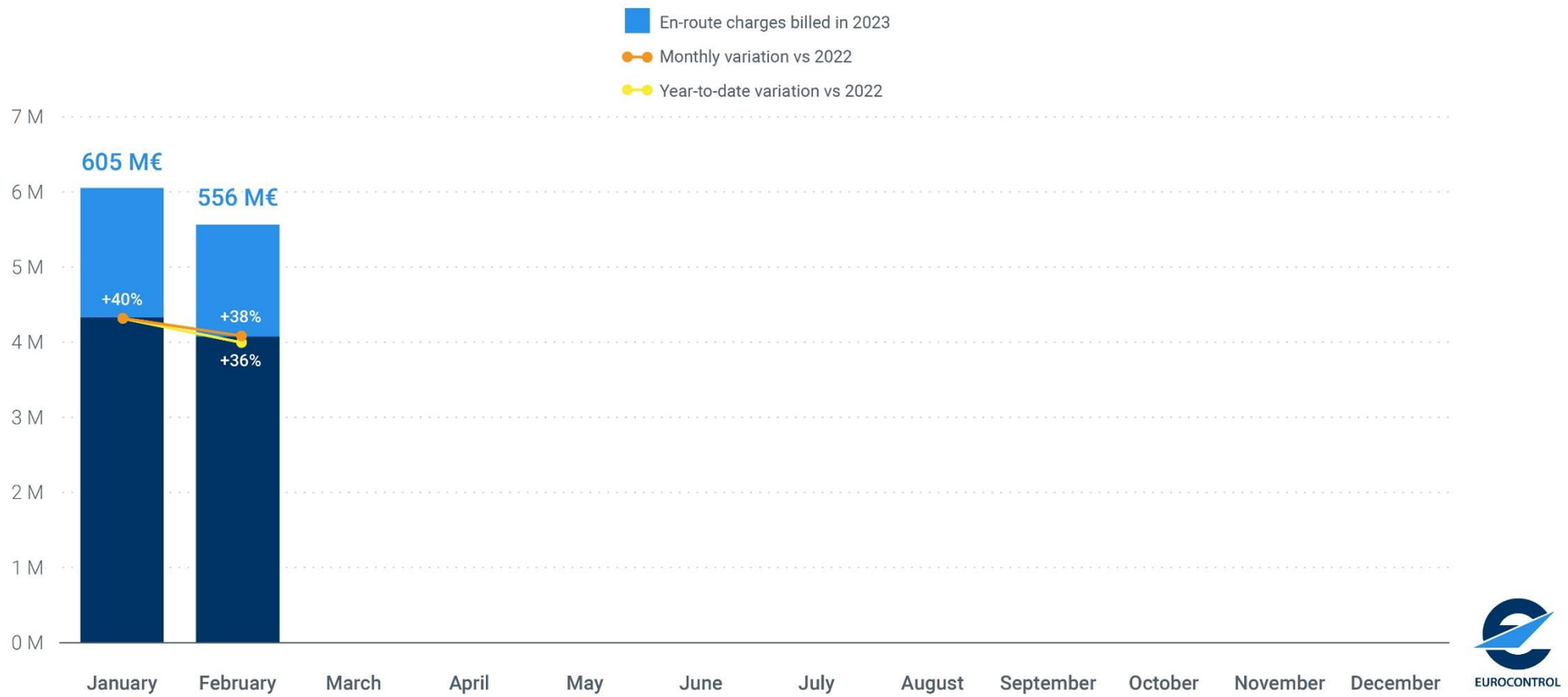
Source: Company reports, STATFOR Analysis

During 2022, and compared to 2021:

- In this top 10, all but 3 aircraft operators posted profits in 2022,
- Turkish Airlines has recorded the highest operating profits for 2022 (+3,1 Bn€).
- Other flag carrier groups (Air France / KLM, IAG and Lufthansa) also posted positive operating profits.
- Ryanair has posted strongly positive results. Pegasus recorded profits too, to a lesser extent.
- Aircraft operators considered in this sample recorded a 7.8Bn€ profits in 2022, after 9.5Bn€ losses in 2021.

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

Year-to-date amount billed: 1,162 M€ (+38% vs 2022)



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- At network level, 556M€ have been billed in February which represents +36% vs 2022 and +11% vs 2019.
- Both evolutions are driven by the evolution of unit rates and the evolution of traffic characterized by the distance flown and the weight of each aircraft (i.e. called Service Units).
- The variation vs 2019 (+11%) is explained by an increase of Unit Rates of +17% and a decrease of Service Units of -5%.
- The variation vs 2022 (+36%) is explained by an increase of Unit Rates of +7% and an increase of Service units of +29%.
- On a year-to-date basis, EUROCONTROL has billed 1,162 M€ which is +38% vs 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