AVIATION INTELLIGENCE+

EUROCONTROL

EUROPEAN AVIATION OVERVIEW

13-19 Nov 2023

Wednesday 22 November 2023

Headlines

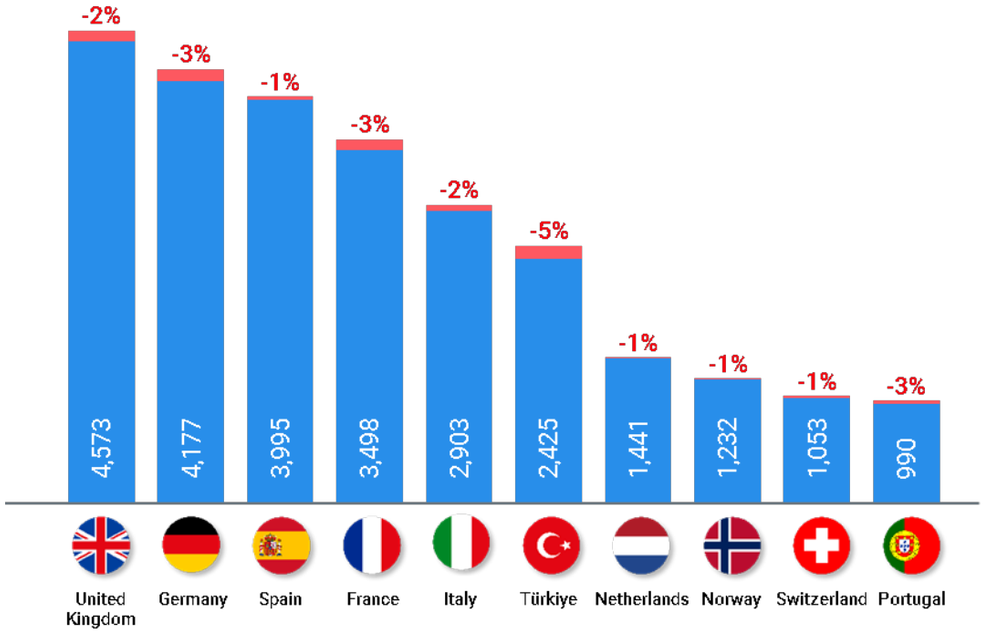
(Week 13-19 Nov 2023)

- The Network recorded 24,506 average daily flights (+7% vs 2022). The average number of flights was 2% lower than in the previous week, with airlines scaling back on flights more than expected, as they changed to winter schedules.
- Since the beginning of November, the number of flights in the network was at 92% of 2019 levels, in line with the low scenario.
- On average, the top 10 carriers decreased their capacities by 2% compared to the previous week.
- En-route ATFM delays averaged just below 13,000 minutes per day (0.53 min/flight), with the main causes being capacity & staffing (46%). The delay levels are now much lower due to the decrease in flights. However, the week registered 5% higher delays compared to the previous week.
- Arrival and departure punctuality, at 76.3% and 72.1% respectively, were 8.4/9.1 percentage points below 2019 levels, and also lower than the equivalent week in 2022.
- The average jet fuel price stood at 2.98 USD/gallon on 17 November 2023, a 3% increase compared to two weeks ago.
- EUROCONTROLbilled 837M€ in en-route charges for October 2023 flights, 16% above the amount billed for October 2022 flights. On a year-to-date basis, EUROCONTROL has billed 7,769M€ in 2023, +20% compared to 2022, reflecting more service units and higher unit rates.

Top 10 busiest States

On week 13-19 Nov 2023

(all flights excl. overflights compared with previous week)



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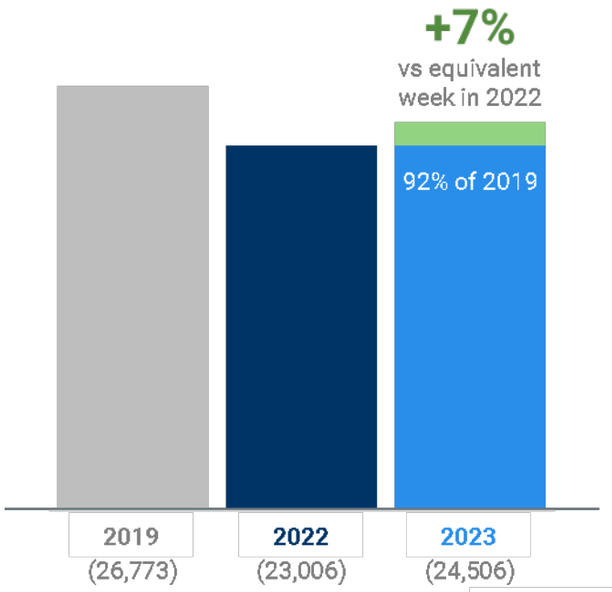
Traffic situation

Average daily flights (including overflights)

Week 13-19 Nov 2023



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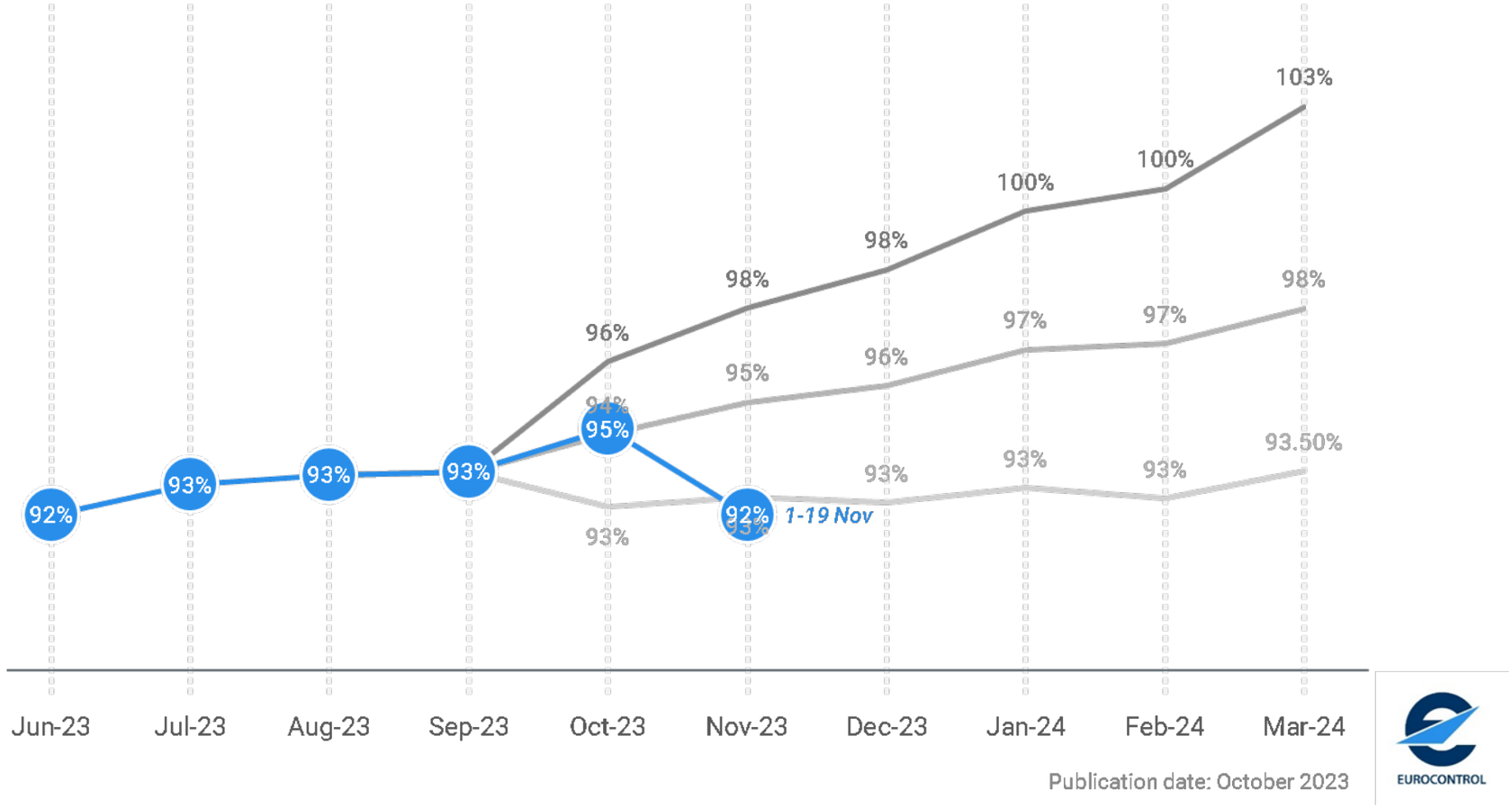
Overall situation compared to the EUROCONTROL Monthly Traffic Forecast

(base year 2019)

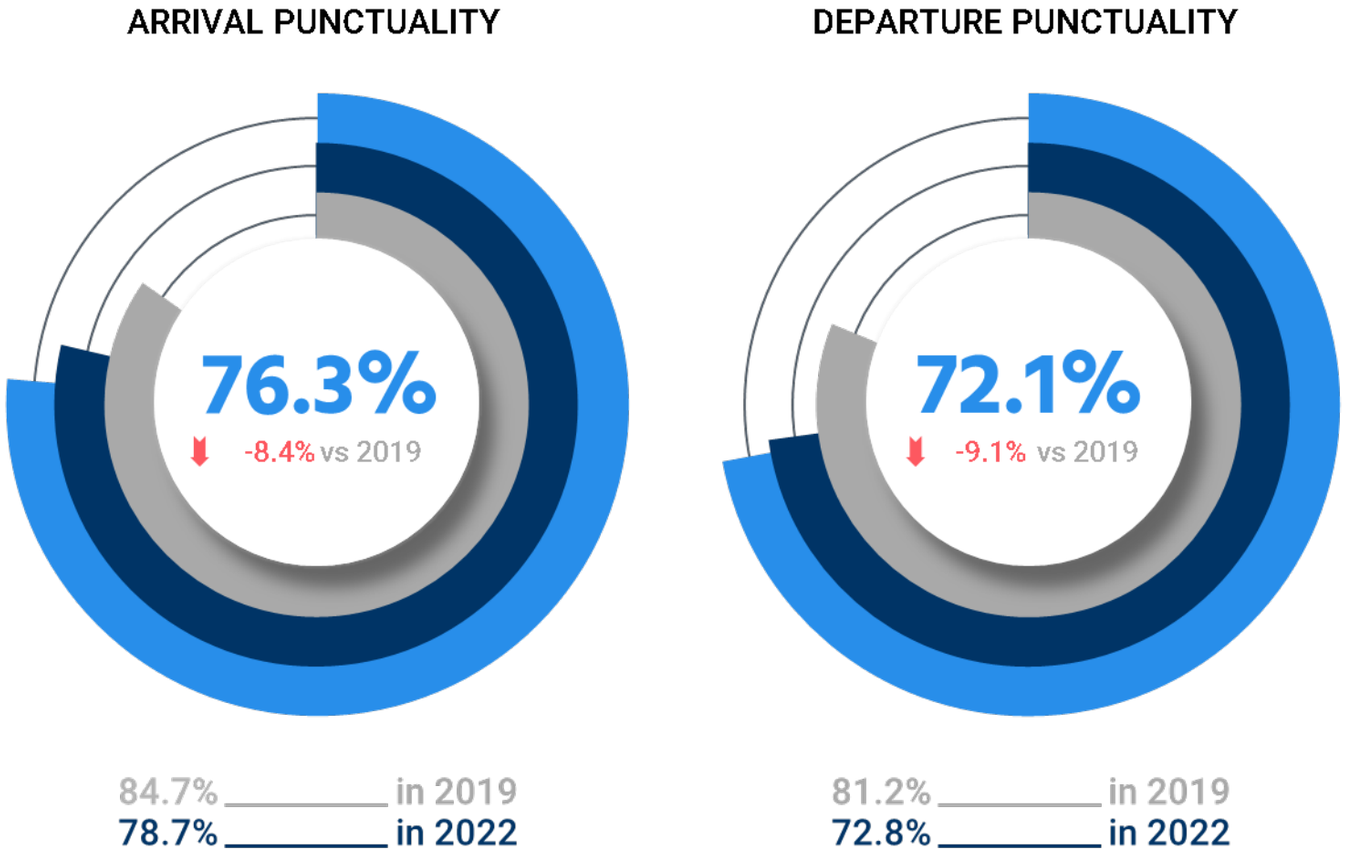


- The latest EUROCONTROL Monthly Traffic Forecasts for the period up to March 2024 predict continuing growth, reaching 98% of 2019 traffic in our Base Scenario by the end of the period.
- For the first 19 days of November 2023, flights closed at 92.4% (rounded to 92%) of November 2019 levels, in line with the low scenario.
- The network recorded fewer flights than anticipated as airline schedules made available during the preparation of the forecast were too optimistic and did not properly reflect the change to winter schedules. Moreover, there were cancellations this month (storm episodes early November as well as cancellations from low-cost airlines, sensitive to the market conditions).
- On a year-to-date basis, Network traffic is at 91% of 2019, and +10% vs 2022

Arrival & departure punctuality

(all network scheduled flights)

Week 13-19 Nov 2023



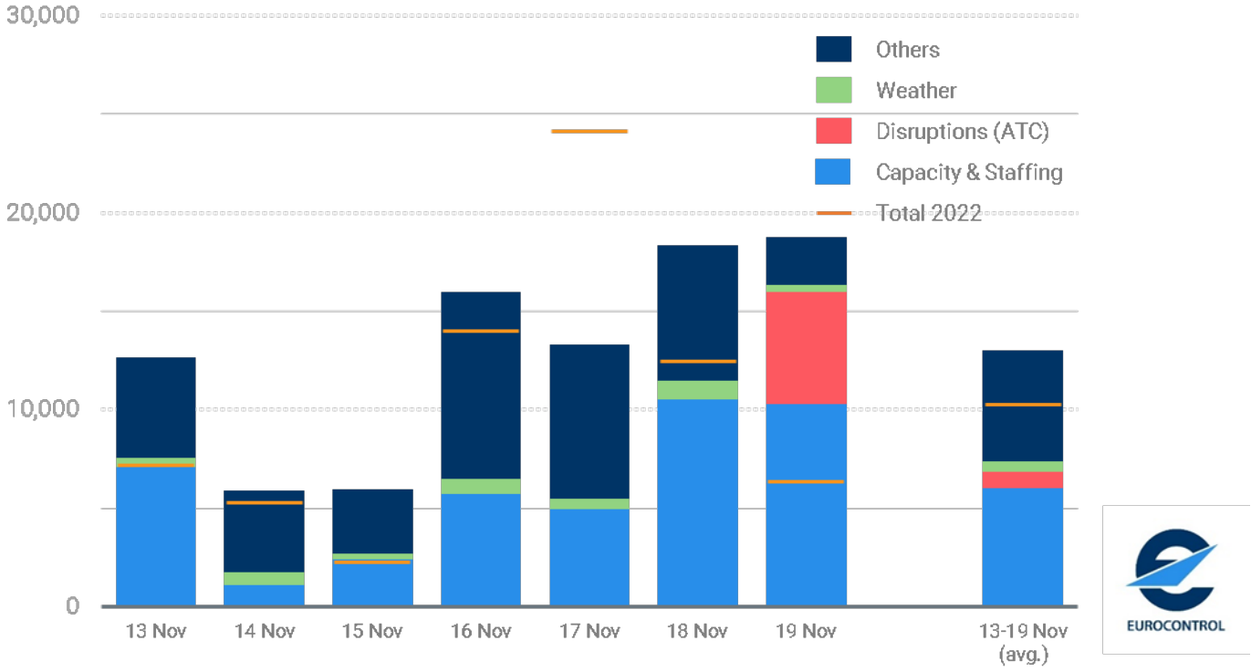
- Network punctuality deteriorated when compared to the equivalent week in 2019. Arrival punctuality was down by 8.4 percentage points to 76.3% with departure punctuality falling by 9.1 percentage points to 72.1%.
- Seasonal weather was the main cause of delays in the network in the week of 13-19 November. Lisbon experienced delays due to low visibility every day of the week; Amsterdam Schiphol saw delays due to low visibility and winds notably on 13, 14 and 19 Nov. Istanbul IGA and Sabiha Gökçen were impacted by thunderstorms and strong winds on 13 and 19 Nov.
- London Heathrow recorded delays due to ATC staffing on 19 Nov, Athens had work in progress on rapid exit taxiways on runway 03L/21R, resulting in single runway operations. Regarding industrial action, the week saw delays at Lanzarote and Fuerteventura airports due to action by staff operating the ATC tower. A French ATC strike commenced in the evening (1700UTC) of 19 November and ran until 21 November (0500UTC).

The pictures show the share of flights arriving/departing no later than 15 minutes after/before the scheduled time (OTP15).

En-route ATFM delays

Delays per cause (EUROCONTROL Area)

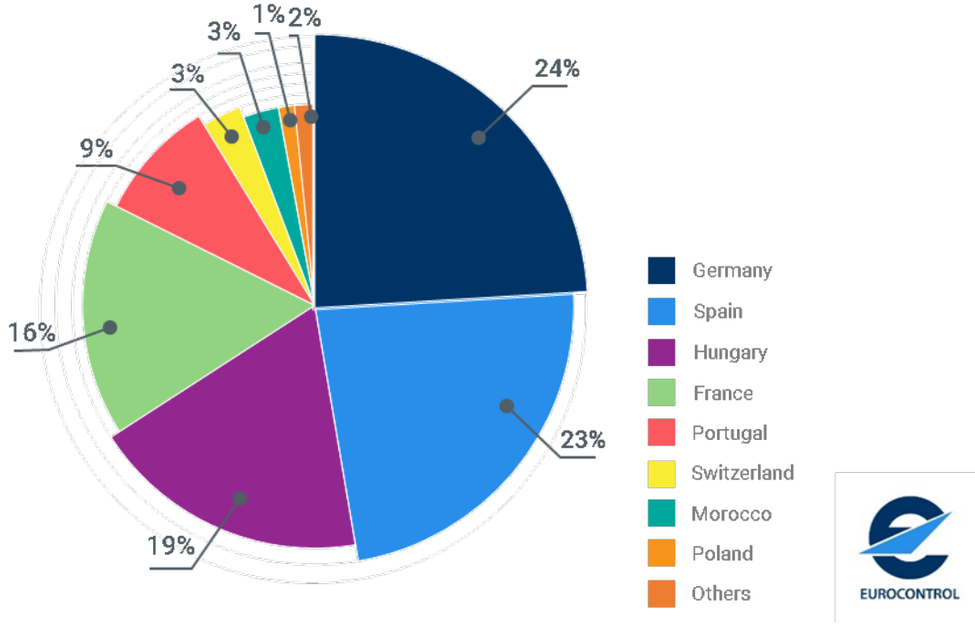
In minutes (total daily and 7-day average) in 2023



- At the end of the 13-19 November week, en-route ATFM delays were above 2022 levels on most days. On a 7-day average (last bar on the right), the week registered delays 27% higher than in the comparable week in 2022.
- On average, they amounted to 12,993 minutes a day, with the main cause being capacity & staffing (46%). ATC disruption was significant on 19 November due to the start of an industrial action in France .

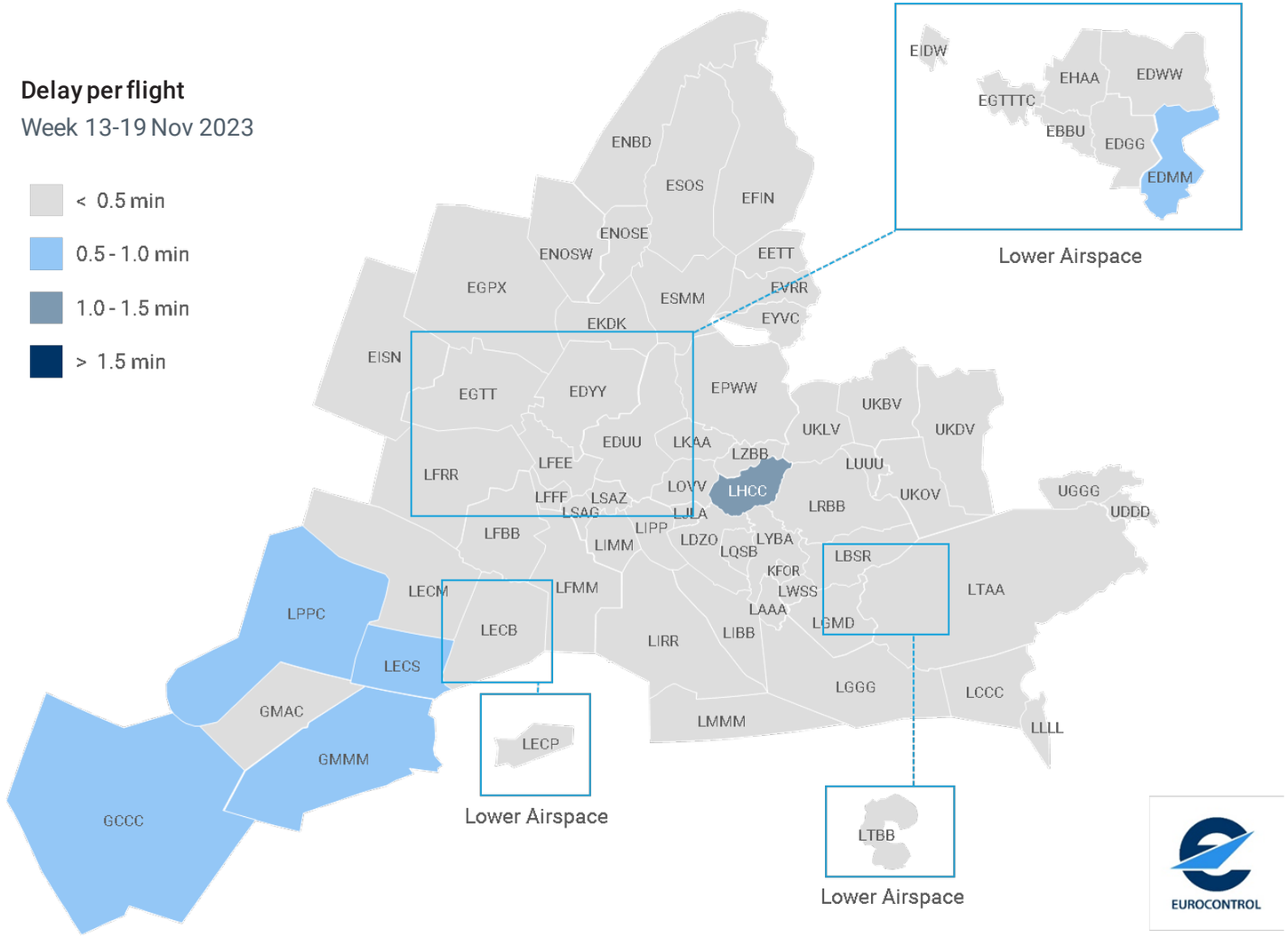
Share of en-route ATFM delays

Week 13-19 Nov 2023



- Germany accounted for 24% of all en-route ATFM delays, owing to system implementation (Munich) but also capacity and staffing (mainly Karlsruhe).
- Spain came second with 23% of all en-route ATFM delays, mainly due to system implementation (Sevilla), changes of procedures (Canaries) as well as some capacity regulations due to a military exercise.
- Hungary came third with 19% of all en-route ATFM delays, owing to limited capacity in some sectors (military exercise) while demand remains strong (unavailability of Lviv FIR)

En-route ATFM delayed flights per Area Control Centre



- Over the last week, en-route ATFM delays have decreased by 5% compared to the week before and are above 2022 levels (12,993 minutes per day, on average).
- Compared to the same week in 2022, en-route ATFM delays were 27% higher.
- Last week, the most affected ACCs were:
  - Budapest (1.1 min/flight), mainly owing to military exercise restricting available area despite strong capacity demand,
  - Sevilla (0.8 min/fl), mainly due to the implementation of new navigation procedures (and airspace design) as well as military exercise,
  - Lisbon (0.7 min/fl), mainly owing to increasing overflights from/to Canaries,
  - Munich (0.7 min/fl), due to system implementation (iCAS).
- Overall, Germany was responsible for 24% of all en-route ATFM delays last week, followed by Spain (23%) and Hungary (19%).

Top 10 States

Departures and arrivals

Week 13-19 Nov 2023

See more

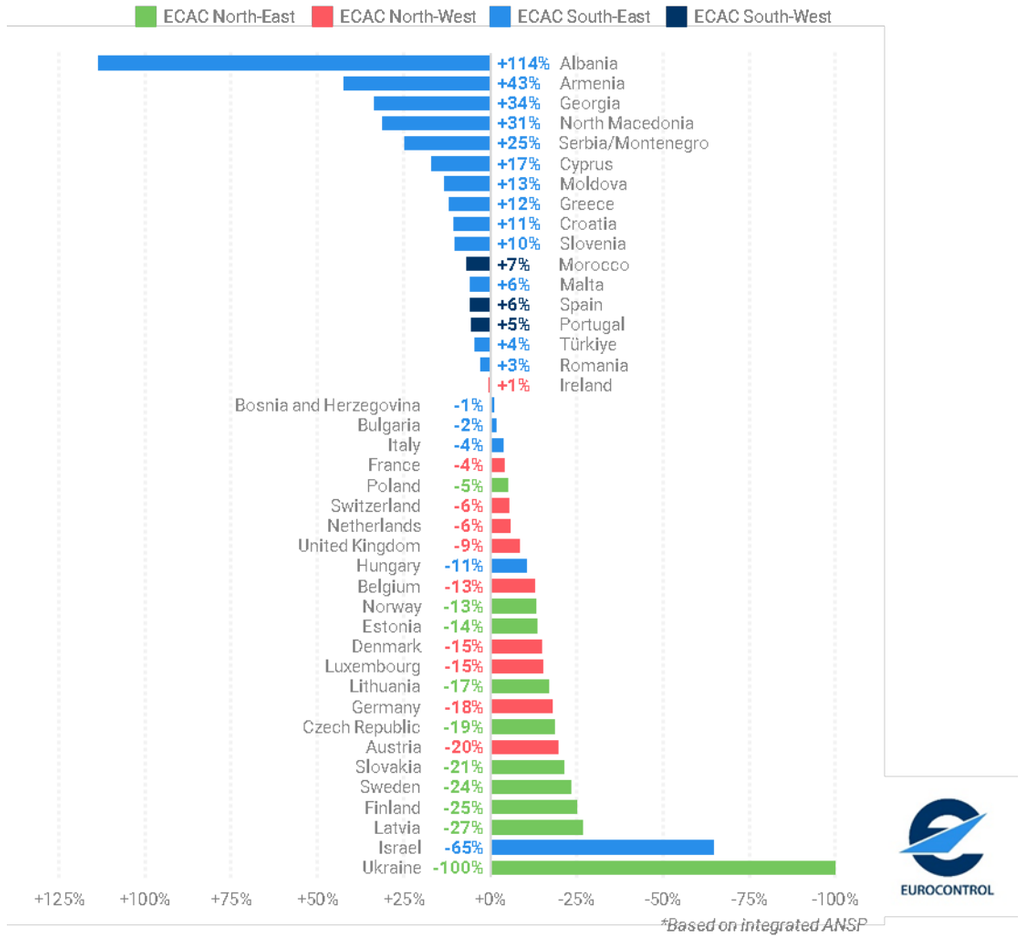
No.	Country	Average daily flights	% prev week	% prev year	% 2019
1.	United Kingdom	4,573	-2%	+8%	-9%
2.	Germany	4,177	-3%	+6%	-18%
3.	Spain	3,995	-1%	+10%	+6%
4.	France	3,498	-3%	+6%	-4%
5.	Italy	2,903	-2%	+11%	-4%
6.	Türkiye	2,425	-5%	+8%	+4%
7.	Netherlands	1,441	-1%	+13%	-6%
8.	Norway	1,232	-1%	-2%	-13%
9.	Switzerland	1,053	-1%	+7%	-6%
10.	Portugal	990	-3%	+6%	+5%

- The top 10 States, in aggregate, recorded fewer flights compared to the previous week (-2.3%).
- Compared to the previous edition: Switzerland and Portugal swapped places.
- All States recorded fewer flights compared to the previous week, mainly as a result of reduction of capacities from the airlines. Türkiye posted the highest decrease but was affected by weather disruptions (13 and 19 Nov).
- Three States within the top 10 are recording traffic above 2019 (Spain, Türkiye, and Portugal). The seven remaining States are still between 18% and 6% below pre-COVID levels.
- The number of flights to/from Israel recorded 65% fewer flights compared to the same week in 2022.

States in the EUROCONTROL Network

Compared to the equivalent week in 2019

Dep/Arr flights for week 13-19 Nov 2023



*Based on integrated ANSP

Top 10 aircraft operators

Week 13-19 Nov 2023 (avg daily flights)

See more

No.	Aircraft operator	Average daily flights	% prev week	% prev year	% 2019
1.	Ryanair Group	2,182	-2%	+0%	+10%
2.	Turkish Airlines	1,289	-1%	+6%	+3%
3.	Lufthansa Airlines	1,179	-1%	+6%	-19%
4.	easyJet Group	1,121	-5%	+20%	-13%
5.	Air France Group	913	-2%	-5%	-19%
6.	Wizz Air Group	790	-0%	+25%	+48%
7.	British Airways Group	781	-2%	+12%	-9%
8.	KLM Group	768	-1%	+28%	+0%
9.	SAS Group	597	-1%	+1%	-29%
10.	Vueling	528	+1%	+11%	+8%

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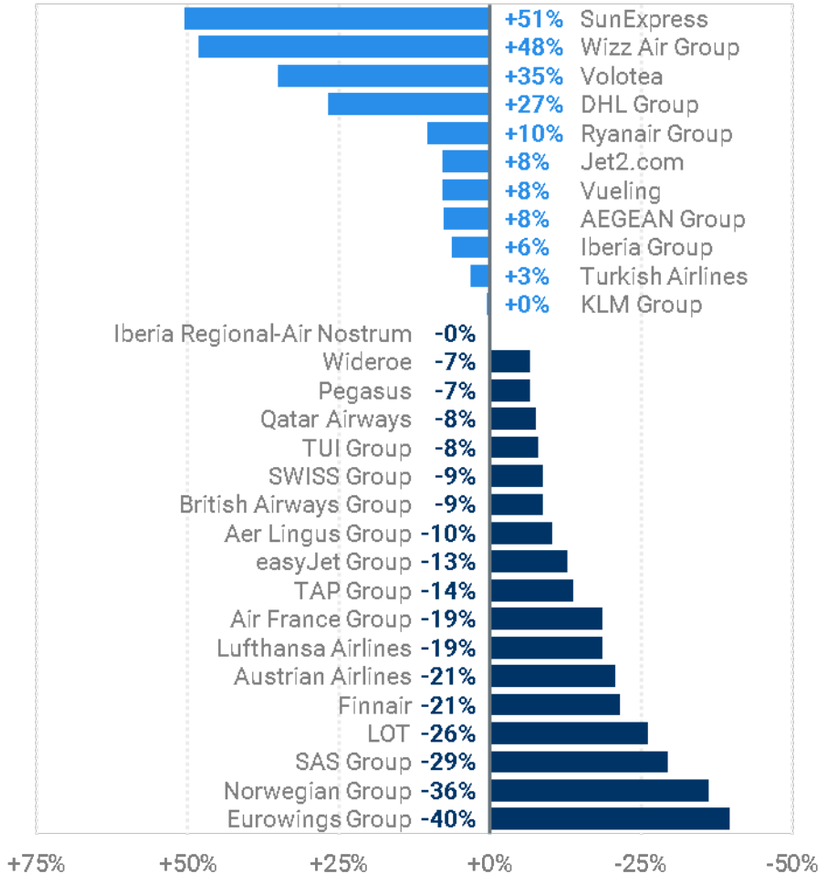
- The top 10 aircraft operators posted a decrease in the number of flights (-1.7% on average) compared to the previous week, owing to a general reduction of capacities.
- Biggest decreases were on flows UK ↔ Spain, domestic France, France ↔ Portugal (easyJet), France ↔ Morocco, France ↔ Portugal, France ↔ Algeria (Air France) and UK ↔ Ireland, domestic flows in Spain and Italy (Ryanair).
- Last week, five airlines within the top 10 had flight numbers above 2019 levels: +48% (Wizz Air Group), +10% (Ryanair Group), +8% (Vueling), +3% (Turkish Airlines) and +0.5% (KLM Group).

Aircraft operators in the EUROCONTROL Network

Compared to the equivalent week in 2019
Dep/Arr flights for week 13-19 Nov 2023



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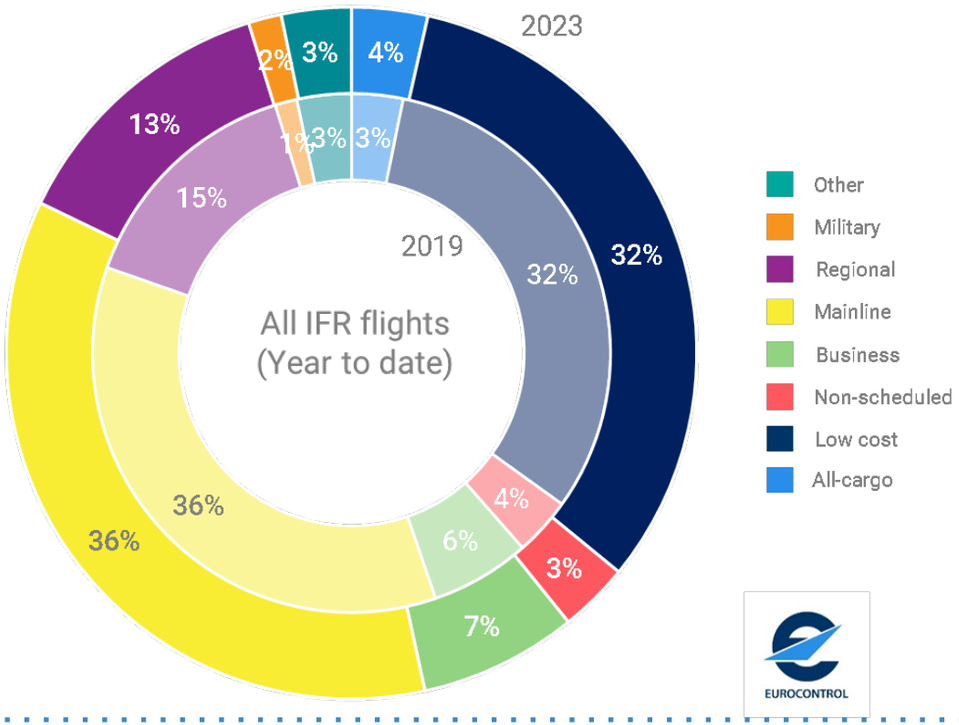
Market segments in the EUROCONTROL Network

Average share of total flights (year to date)



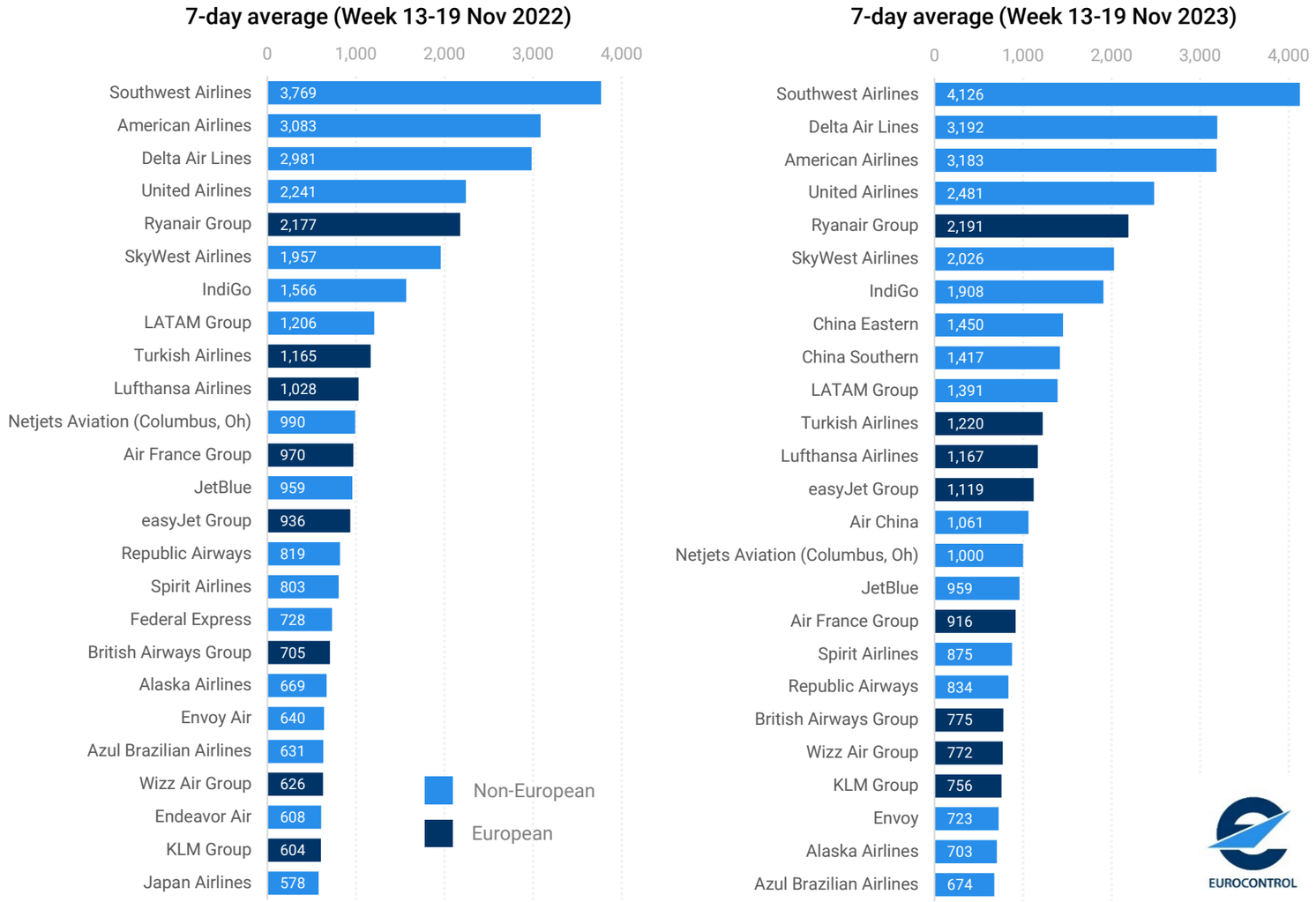
Week 13-19 Nov 2023

No.	Market segment	Avg. flights	% prev week	% prev year	% 2019
1.	Mainline	9,220	-1%	+11%	-9%
2.	Low Cost	7,269	-3%	+10%	-2%
3.	Regional	3,543	-1%	+3%	-16%
4.	Business	1,726	-0%	-1%	+14%
5.	All-cargo	1,035	+1%	-6%	+7%
6.	Other	774	-7%	-7%	-26%
7.	Military	478	-3%	+13%	+19%
8.	Non-Scheduled	461	-10%	-10%	-15%

- Major market segments (Mainline and Low-Cost) recorded the same market shares in 2023 (year-to-date) as in 2019 (comparable period). Regional and Non-Scheduled market shares slightly reduced (-2 pp and -1 pp, respectively) while the All-Cargo and Business Aviation market shares slightly expanded (+1 pp each).
- Compared to 2022, passenger markets recorded growth in the number of flights operated: Mainline (+11%), Low-cost (+10%) and Regional (+3%).
- On the other hand, Business Aviation and All-cargo (-1% and -6% respectively) are now recording fewer flights in 2023 compared to 2022 levels. Over the week 13-19 November 2023, the Non-Scheduled segment recorded a 10% decline, mainly owing to some decreases from Turkish charters (cancellations due to weather led to reduction on Turkish domestic routes).

Top 25 global aircraft operators

(average daily departure flights)

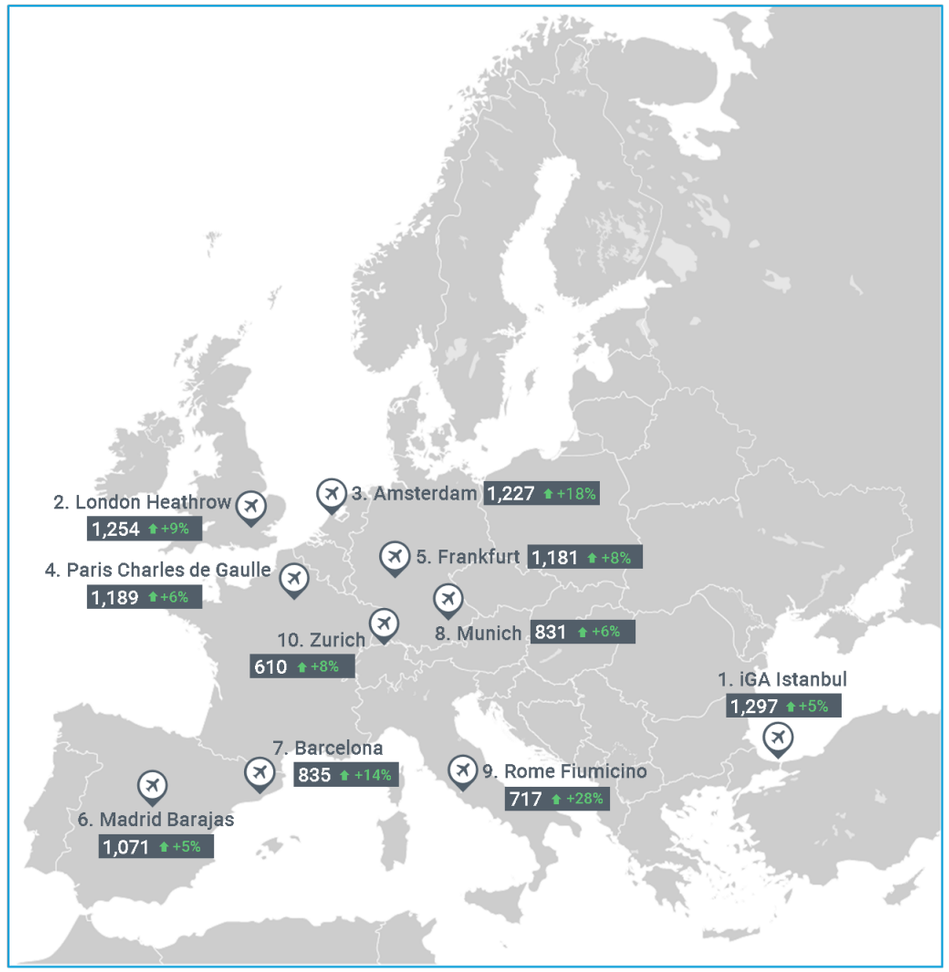


Source: Flightradar24 Historical Global Utilisation data

Over the last week:

- Eight European airlines are ranked in the top 25 global aircraft operators (same airlines in 2022).
- The first European aircraft operator is Ryanair (ranked 5th) – the same rank as a year ago.
- Seven more airlines make the top 25: Turkish Airlines (11th), Lufthansa (12th), easyJet (13th) Air France (17th), British Airways (20th), Wizz Air (21st) and KLM (22nd).

Top 10 airports



Airport ranking

Week 13-19 Nov 2023

See more

No.	Airport	Avg. daily dep/arr flights	% prev week	% 2022	% 2019
1.	iGA Istanbul	1,297	-1%	+5%	+12%
2.	London Heathrow	1,254	-1%	+9%	-2%
3.	Amsterdam	1,227	-1%	+18%	-6%
4.	Paris Charles de Gaulle	1,189	-2%	+6%	-7%
5.	Frankfurt	1,181	-2%	+8%	-10%
6.	Madrid Barajas	1,071	-0%	+5%	-5%
7.	Barcelona	835	-1%	+14%	+1%
8.	Munich	831	-1%	+6%	-23%
9.	Rome Fiumicino	717	-1%	+28%	-5%
10.	Zurich	610	-1%	+8%	-6%

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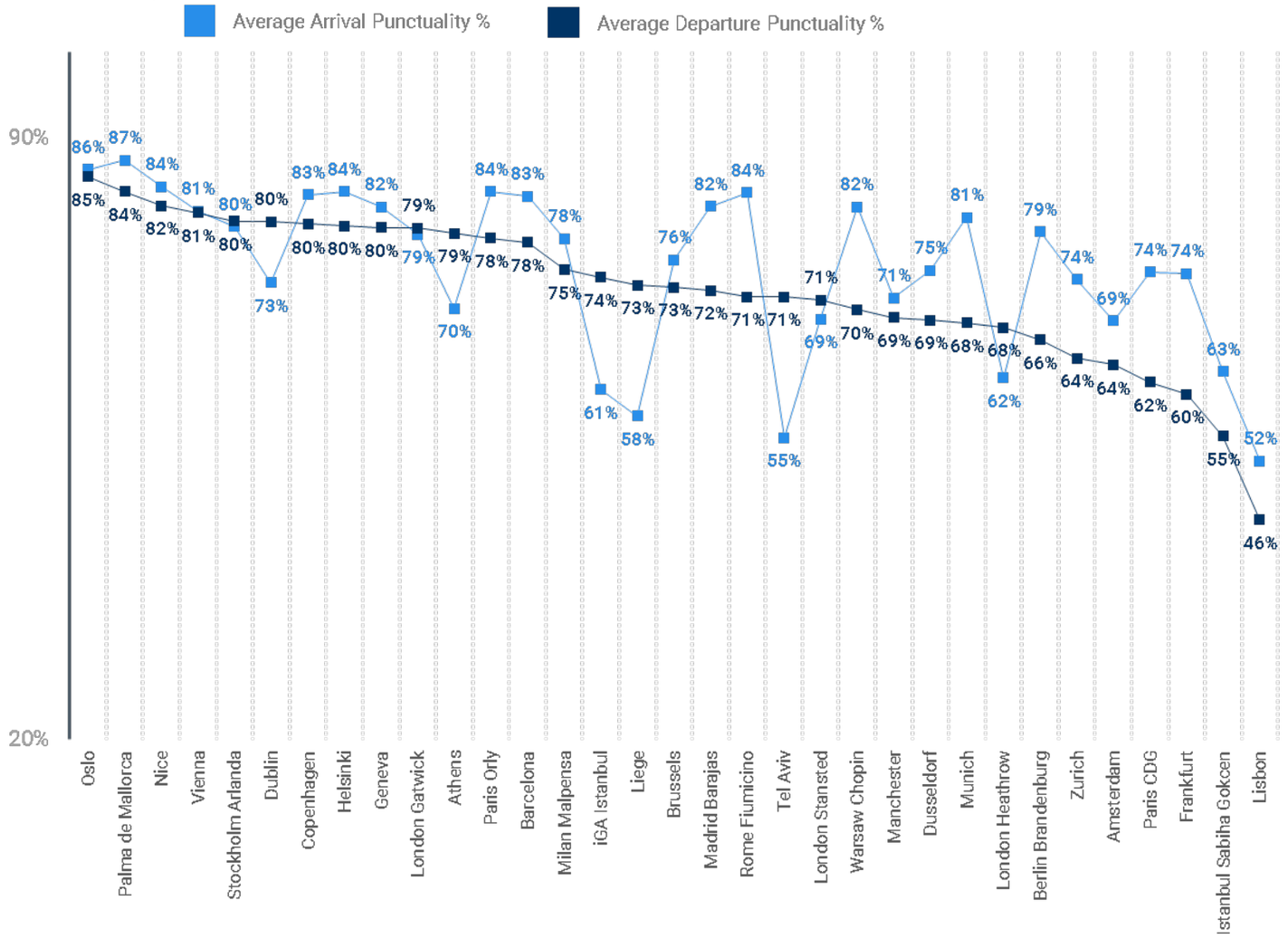
- Some changes in the ranking compared to the previous edition: Amsterdam airport has moved (back) to the 3rd position. London Gatwick has dropped out of the top 10, replaced by Zurich.
- No airport recorded growth vs the previous week.
- All airports experienced growth vs 2022, ranging from +5% (iGA Istanbul and Madrid) to +28% (Rome).
- Only two of the top 10 airports (iGA Istanbul and Barcelona) are currently handling traffic above their 2019 levels.

Average arr/dep punctuality at main airports

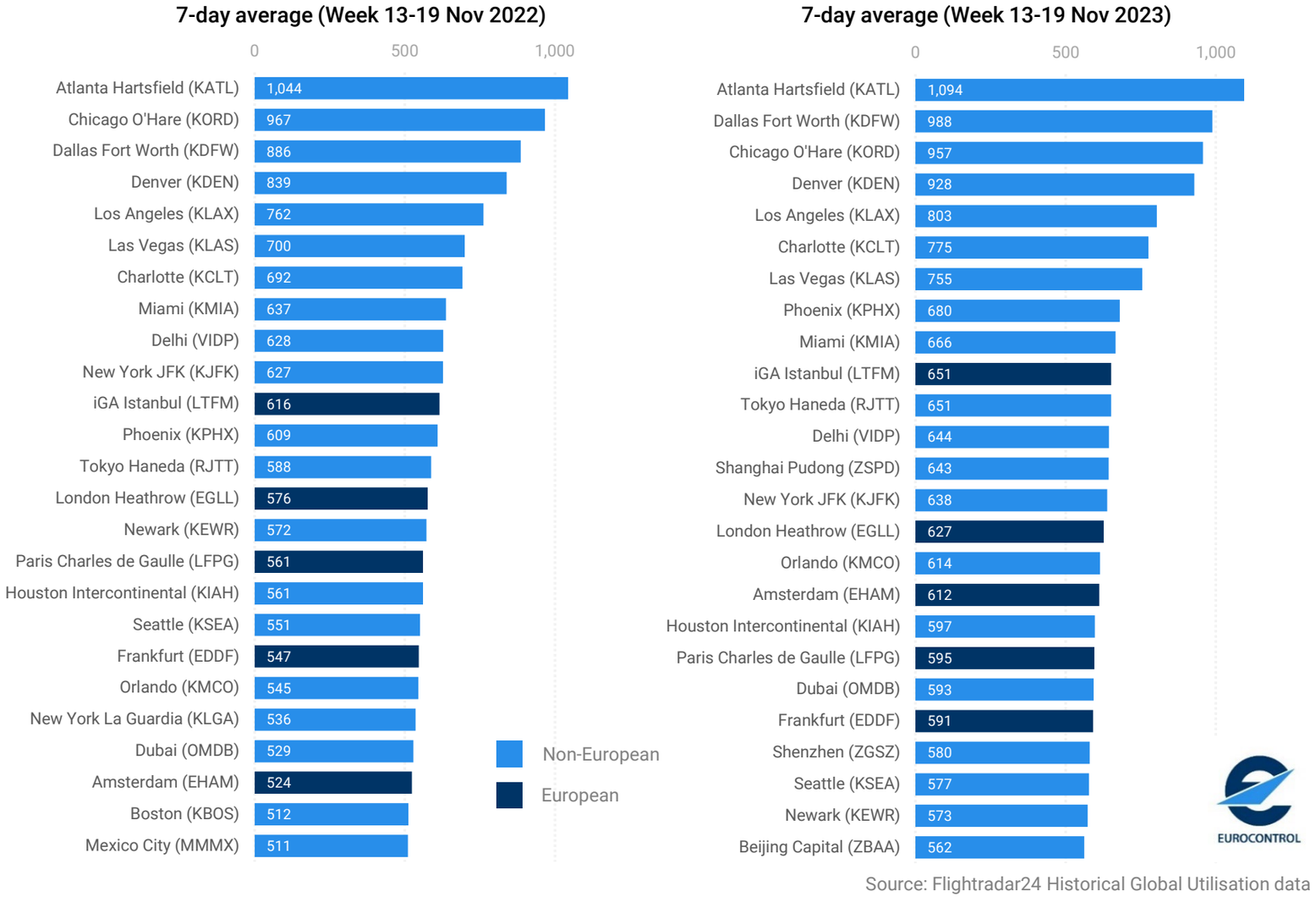
(Week 13-19 Nov 2023)



- 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. From July to November, arrival and punctuality figures deteriorated again compared to 2019.
- Since the beginning of the year:
  - Arrival punctuality is 70.7% in 2023, 6.9 percentage points below the same period in 2019,
  - Departure punctuality is 64.9% in 2023, 7.2 percentage points below 2019 figure.
- Arrival punctuality is higher (i.e. better) than departure punctuality at most airports.
- However,a few airports (Dublin, Athens, iGA Istanbul, Liège, Tel Aviv and London Heathrow) 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

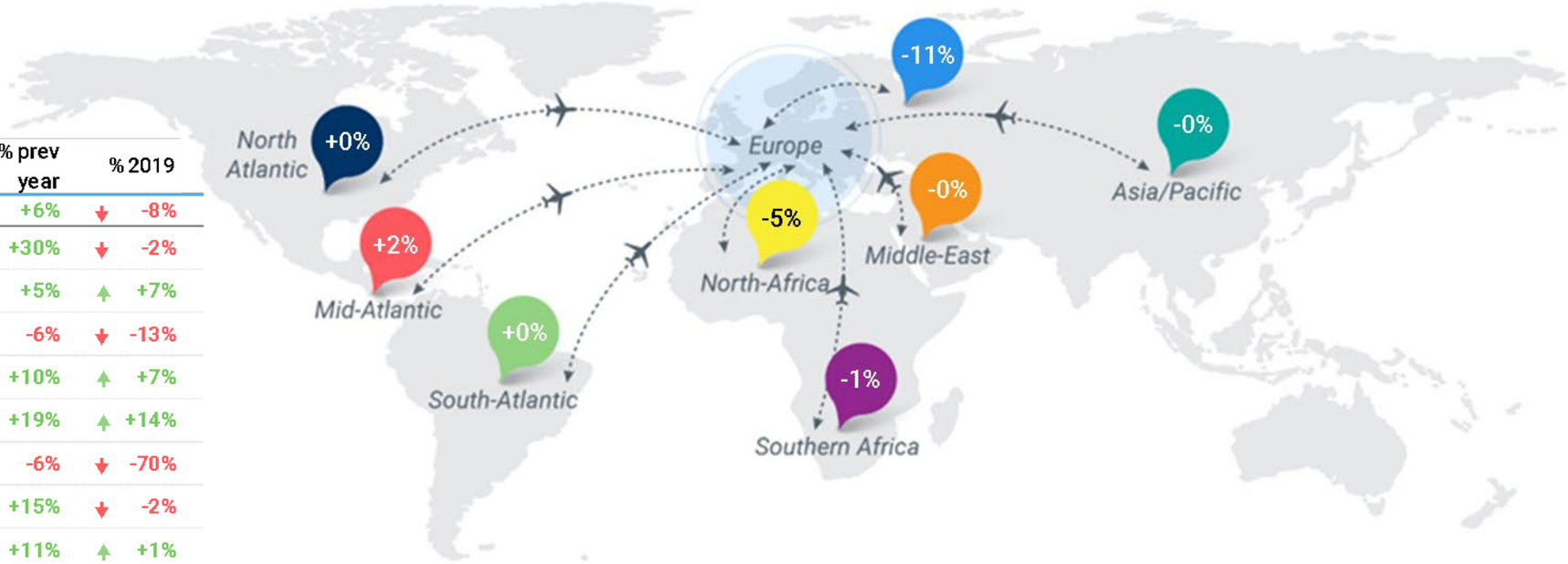
Over the last week

- Five European airports are ranked in the top 25 of global airport departures (similar airports, compared to 2022).
- The highest ranked European airport (10th) is iGA Istanbul Airport; it was ranked 11th in 2022.
- The other European airports in the top 25 are London Heathrow (15th), Amsterdam (17th), Paris CDG (19th) and Frankfurt (21st).

Traffic flows

(average daily departure/arrival flights for week 13-19 Nov 2023)

Region	Average daily flights	% prev week	% prev year	% 2019
Intra-Europe	18,766	-2%	+6%	-8%
Europe ↔ Asia/Pacific	777	-0%	+30%	-2%
Europe ↔ Mid-Atlantic	185	+2%	+5%	+7%
Europe ↔ Middle-East	1,160	-0%	-6%	-13%
Europe ↔ North Atlantic	1,098	+0%	+10%	+7%
Europe ↔ North-Africa	1,084	-5%	+19%	+14%
Europe ↔ Other Europe	242	-11%	-6%	-70%
Europe ↔ South-Atlantic	181	+0%	+15%	-2%
Europe ↔ Southern Africa	325	-1%	+11%	+1%
Non Intra-Europe	5,052	-2%	+9%	-10%



- The main traffic flow was intra-European with 18,766 daily flights last week, fewer (-2%) than the previous week. Intercontinental flows resulted in 5,052 daily flights on average last week, -2% vs the previous week.
- The second-largest regional flow is between Europe and Middle-East: 1,160 average daily flights last week stable compared to the previous week.
- The third flow is to/from North-Atlantic, with 1,098 daily flights, recording similar levels compared to the previous week.
- The fourth flow is to/from North-Africa, with 1,084 flights per day, decreased (-5%) vs the previous week's value.
- Flows with Other Europe (including the Russian Federation) remain massively reduced at -70% compared to 2019.
- Flows between Europe and Asia/Pacific have now largely recovered to only -2% compared to 2019. European flows with China (including Hong Kong) were at 233 daily flights last week (no change compared to the last edition).

Top 10 long-haul country pairs

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

Week 13-19 Nov 2023

No.	Country pair	Average daily flights	% prev week	% prev year	% 2019
1.	UK ↔ US	285	+2%	+8%	+2%
2.	Germany ↔ US	144	-2%	+3%	-2%
3.	France ↔ US	109	+0%	+12%	+8%
4.	Netherlands ↔ US	68	-1%	+4%	-1%
5.	UAE ↔ UK	62	-3%	+13%	-8%
6.	Spain ↔ US	61	+5%	+26%	+19%
7.	Ireland ↔ US	52	-2%	+11%	+9%
8.	Italy ↔ US	49	+1%	+39%	+20%
9.	Germany ↔ UAE	41	-1%	+5%	-1%
10.	Russia ↔ UAE	41	-9%	+28%	+720%

- Seven of the top 10 long-haul country pairs are with the United States, the main three being between the US and the UK, Germany and France. The three remaining flows within the top 10 are pairs between Europe and the United Arab Emirates.
- Only four flows posted an increase vs the previous week (ranging from +0% to +5%).
- All flows posted an increase on the same week in 2022.
- Six flows are currently at or above 2019 levels (UK ↔ US, France ↔ US, Spain ↔ US, Ireland ↔ US, Italy ↔ UK and Russia ↔ UAE; this last flow is largely inflated by the Ukraine-Russia war, with the UAE acting as a hubbing alternative to Europe).

Economics

Week 13-19 Nov 2023

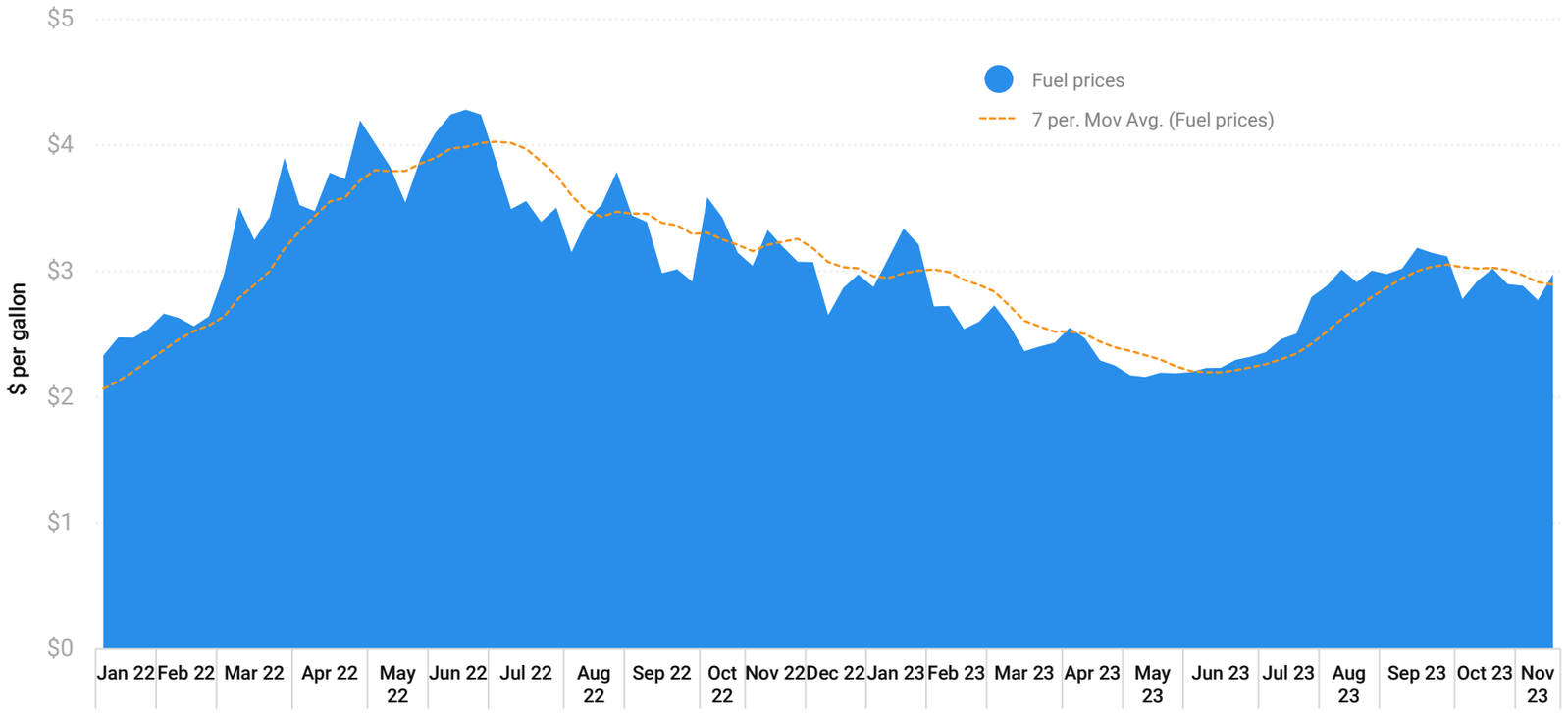
17 Nov 2023
avg fuel price:

$2.98 /gallon

3%
vs. $2.88 /gallon
on 03 Nov 2023

Source: IATA/Platts

Jet fuel price (Europe)

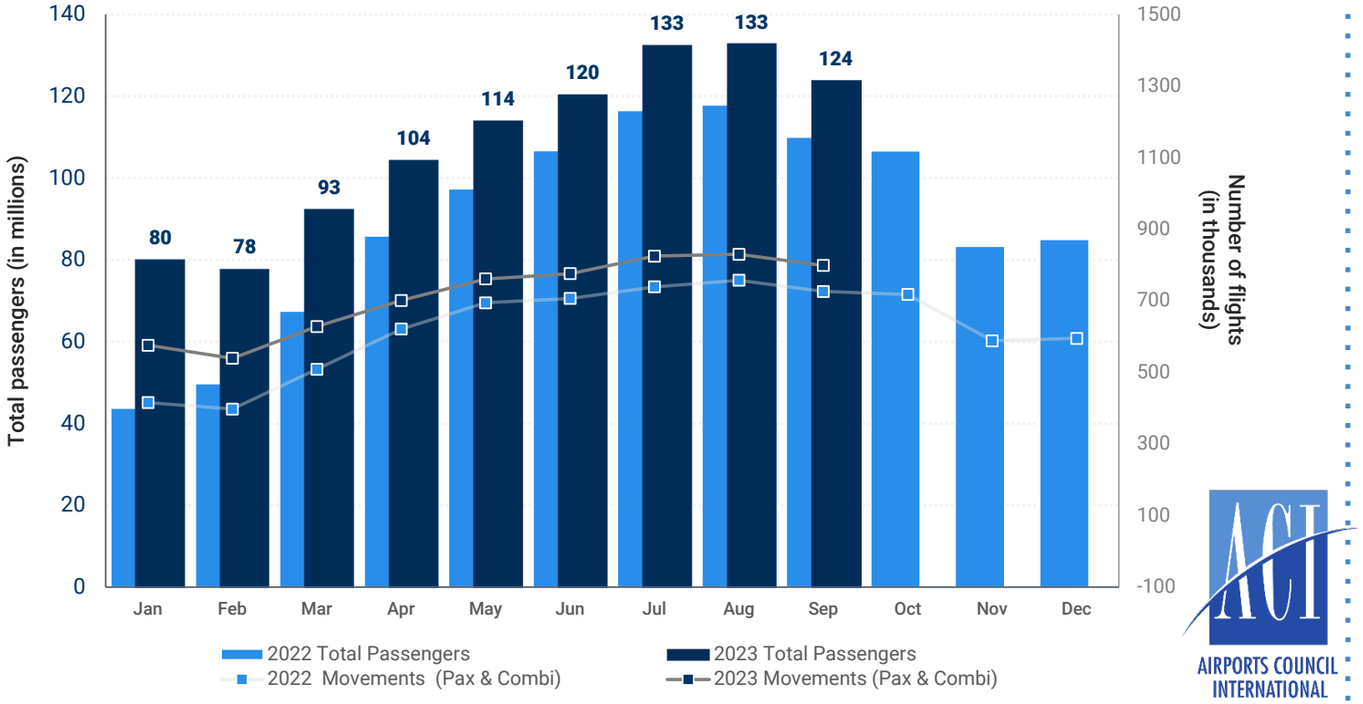


Source: IATA/Platts

- The average price of jet fuel was at 2.98 USD/gallon on 17 November 2023, higher (+3%) than in the last Overview, and similar to the beginning of 2023.
- Based on a moving average trend, fuel prices in Europe mainly declined between June 2022 ($4/gallon) and June 2023 ($2.20/gallon).
- After June 2023, jet fuel prices rose when Saudi Arabia (and the Russian Federation) started to cut oil production. However, since September a slight decline has occurred.

Top 40 European airports: passengers

Number of passengers and flights per month



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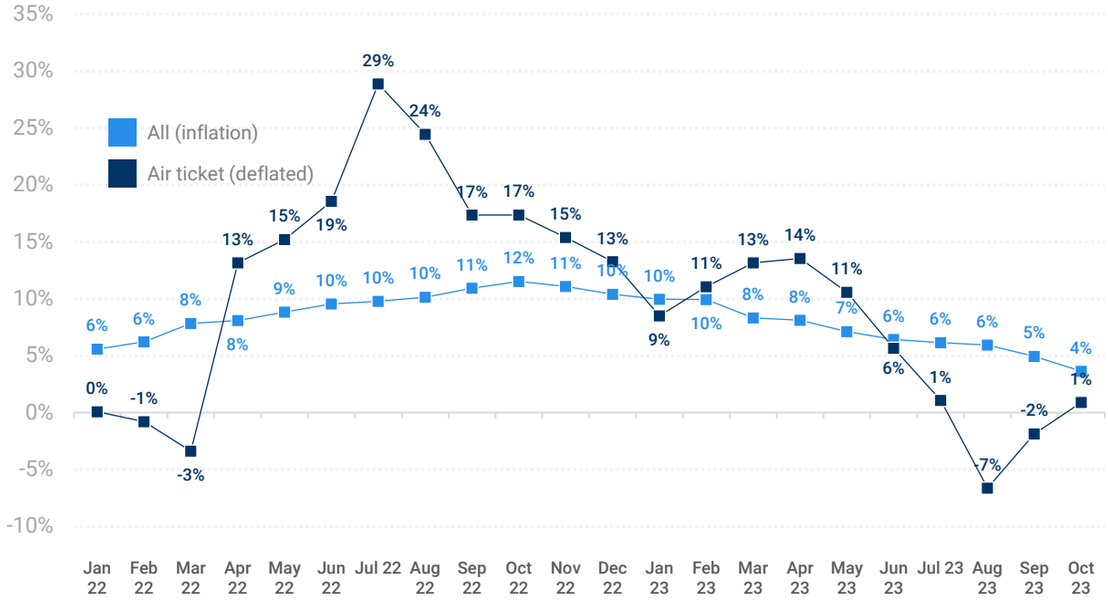
Based on ACI passenger data, the total number of passengers and corresponding aircraft movements for the top 40 ECAC airports show:

- 124 million passengers were recorded in September 2023, corresponding to a 13% growth (vs September 2022), while corresponding movements increased by 10% over the same period.
- On a year-to-date basis, these airports welcomed 979 million passengers, which is 23% higher than in 2022 (same period).

Price change per month (EU27)

Values compare to the same month of the previous year



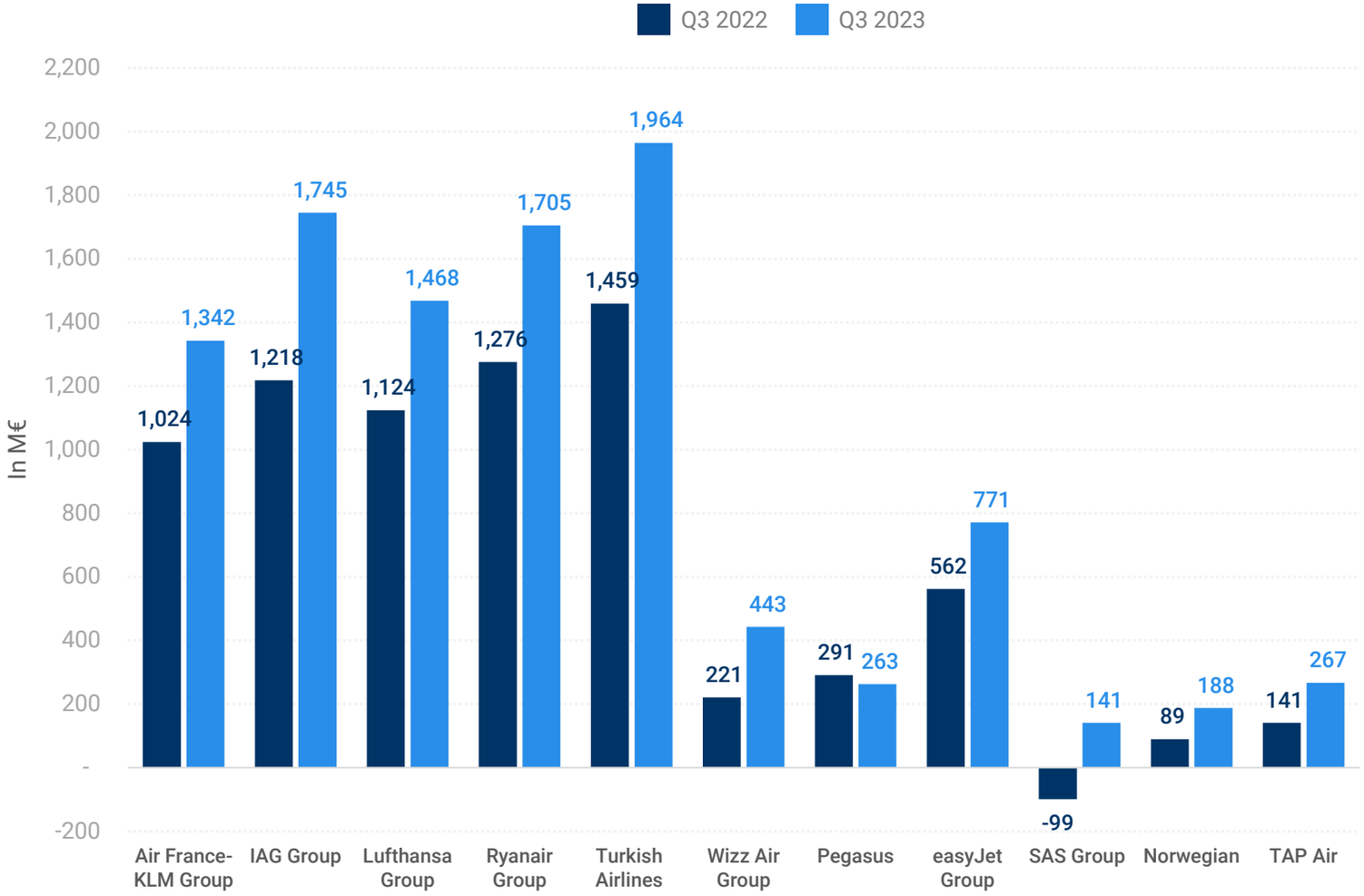
Source: EUROSTAT

The latest information from EUROSTAT shows the following:

- In October 2023, all-prices inflation for the EU27 increased by 4%. A year ago, they were posting a 12% increase.
- In October 2023, ticket prices increased for the EU27 by 1% (excluding inflation. A year ago, ticket prices were recording a 17% rate.

Operating profits of airlines

In M€, comparing the third quarter in 2023 and 2022



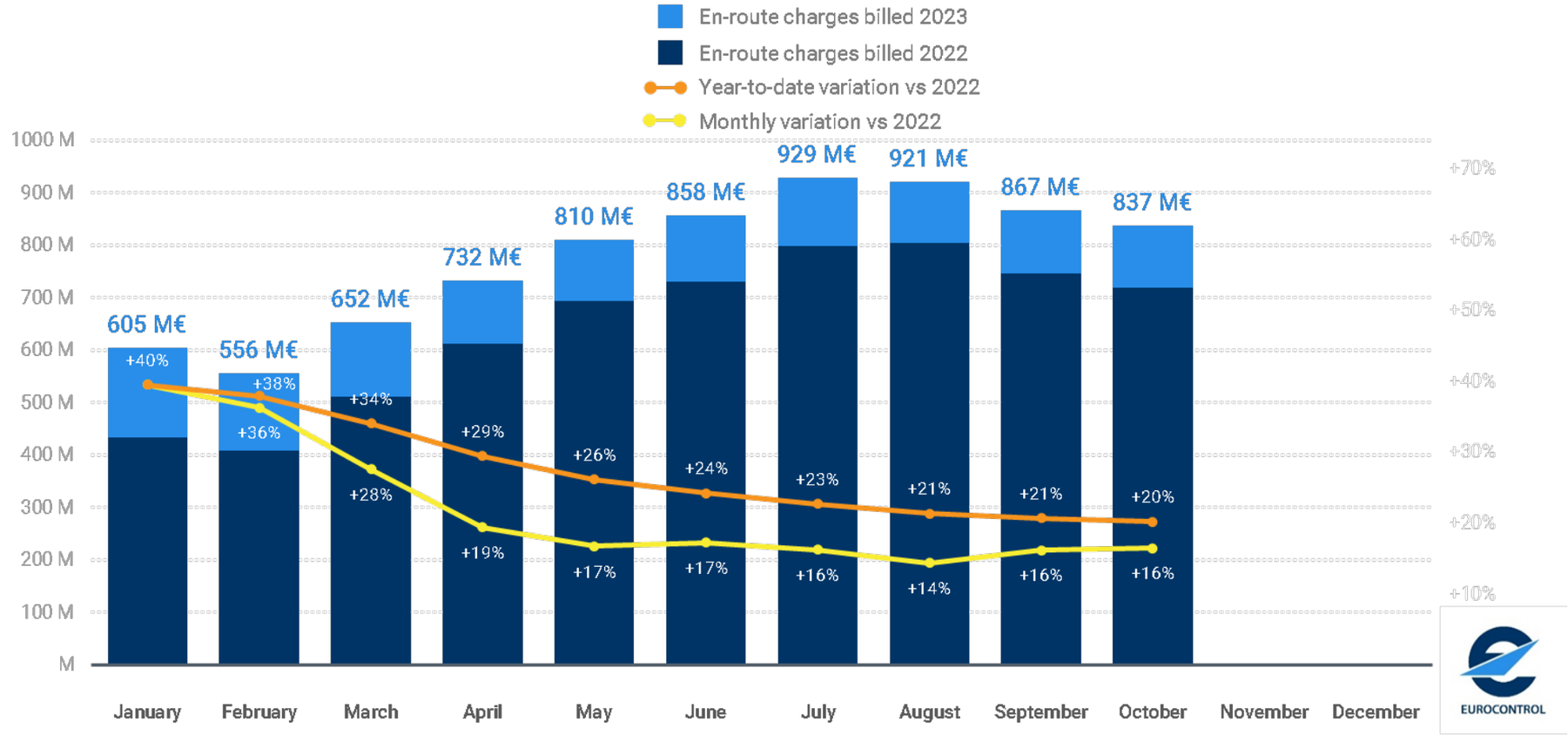
Source: Company reports

During the third quarter of 2023 (Q3), and compared to the third quarter of 2022:

- As for the first half of 2023, all airlines/airline groups in this top 11 managed to improve their results during Q3 2023, compared to the same period last year.
- Amongst the highest profits during Q3 2023:
  - Turkish Airlines recorded the highest operating profits (1,964 M€) in the sample, by responding to a strong summer demand across all its network's routes.
  - IAG group posted operating profits of 1,745M€ owing to increased demand across transatlantic routes. Aer Lingus reported record Premium leisure demand on its transatlantic network. Iberia reported corporate travel back to pre-Covid levels.
  - Lufthansa Group recorded 1,468 M€ operating profits owing to sustained strong demand for leisure travel and higher capacity across all its airlines with Brussels Airlines in particular posting its most profitable quarter ever (72 M€).
- The airlines considered in this sample recorded 10.3 Bn€ operating profits in Q3 2023, a 41% improvement on Q3 2022.

En-route air navigation charges for the EUROCONTROL Area (2023)

Year-to-date amount billed: 7,769 M€ (+20% vs 2022)



- At Network level, 837 M€ were billed in October which represents +16% vs 2022 and +16% 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 October 2023 variation vs October 2022 (+16%) is explained by an increase in Unit Rates (+7%) and an increase in Service Units (+11%).
- On a year-to-date basis, EUROCONTROL has billed 7,769M€, which is +20% vs 2022.

Supporting European Aviation

EUROCONTROL

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