



ARGUS

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G L O B A L

**Aircraft**

**Activity**

**Report**

AUGUST 2023

**SGS**

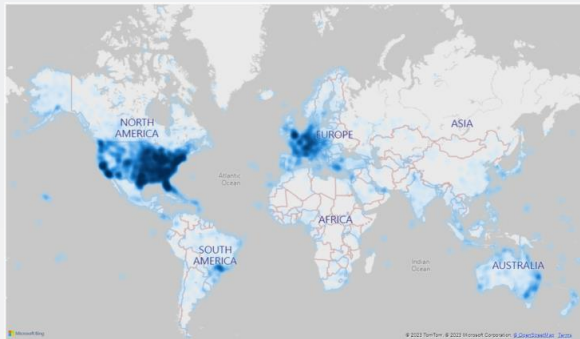
**ARG/US**

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## GLOBAL FLIGHT ACTIVITY MISSES EXPECTATIONS IN AUGUST.

Global flight activity recorded an activity decrease of 3.9% from August 2022, while monthly activity was down 1.8% from July 2023. The North American market reported a 3.8% yearly decrease in activity from August 2022, which fell short of the 0.1% decline that was forecasted. The European market remained status quo to wrap up the busy summer season, finishing down 9.4% year over year.



August 2023 Global Activity Heat Map

## NEXT MONTH'S FORECAST

Looking ahead... TRAQPak analysts estimate there will be a 4.5% decrease in overall North American flight activity year over year in September 2023. European activity is estimated to decrease 11.9% year over year.

## YEAR-OVER-YEAR FLIGHT ACTIVITY FOR NORTH AMERICA

TRAQPak's review of year over year flight activity (August 2023 vs. August 2022) shows that August 2023 finished down 3.8% from the prior year. TRAQPak had forecasted a decline of 0.1% for August. The results by operational category were mixed for the month with Fractional activity remaining the only positive segment, up 7.9% from August 2022. The Part 91 market reported further weakness in mid-size cabin activity which pushed the segment down 5.3%. Part 135 activity finished down 6.5% year over year after reporting another double digit loss in small cabin activity. The aircraft categories were mostly negative this month with large cabin jets posting a flat month; August 2023 flew 12 less flights than August 2022 for large cabin aircraft. Small and mid-size cabin aircraft reported decreases of 5.7% and 2.5% respectively. The turboprop market finished down 5.1%. There were 4 individual segments that reported year over year increases with 3 of them coming from the Fractional segment. The largest increase was recorded in the Fractional mid-size cabin market, up 10.1% year over year.

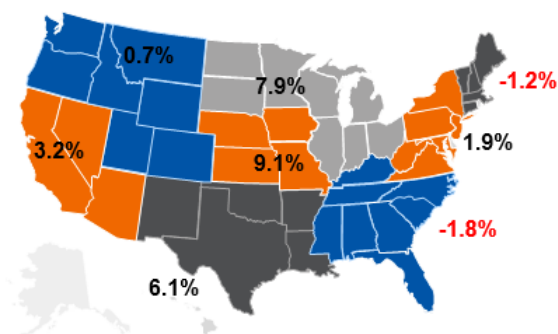
Acft Type	Part 91	Part 135	Fractional	Total
Turbo Prop	-2.4%	-8.7%	-0.3%	-5.1%
Small Cabin Jet	-3.1%	-14.9%	6.0%	-5.7%
Mid Size Cabin Jet	-13.0%	-1.5%	10.1%	-2.5%
Large Cabin Jet	-3.3%	3.0%	5.9%	0.0%
Total	-5.3%	-6.5%	7.9%	-3.8%

Aug. 2023 vs Aug. 2022

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## MONTH-OVER-MONTH FLIGHT ACTIVITY FOR NORTH AMERICA

August business aviation flight activity showed a 2.2% increase in activity from July after every operational and aircraft category increased for the month. Results by operational category were solid for the month, with Fractional activity posting the largest increase, up 4.9% from July. Part 91 activity gained 2.7% for the month while Part 135 activity was up 0.4%. Reviewing the FAA regional activity, 6 of the 8 regions reported a monthly increase in flight activity. The Central posted the largest monthly increase in activity, up 9.1%, while the Southeast region recorded the largest decrease down 1.8%. Activity in Canada and the Caribbean combined to decrease 1.0% month over month from July due to a 21.6% decrease in Caribbean activity during their slow summer season. The 3.8% decline in North America was mostly across the board with the exception of continued strength in the Fractional market and the Part 135 large cabin market.





## TRAQPak AIRCRAFT CATEGORIES

### TURBO PROP

Single Engine Turboprop Aircraft and Multi-Engine Turboprop Aircraft.

### SMALL CABIN JET

Very Light Jets (VLJ) and Light Jets (LJ)-Jet aircraft with a maximum takeoff weight of less than 20,000 lbs.

### MID-SIZE CABIN JET

Mid-size Jets (MJ) and Super Mid-size Jets (SMJ) - Jet aircraft with maximum takeoff weight of over 20,000 to 41,000 lbs

### LARGE CABIN JET

Large Jets, Ultra-Long Range and Heavy Jets – Jet aircraft with maximum takeoff weight of over 41,000 lbs. For weight over 41,000 lbs and Ultra-Long Range and Heavy Jets having an NBAA IFR Range above 6,000NM.

ARGUS TRAQPak data is aircraft flight number specific arrival and departure information on all IFR flights in the US (including Alaska and Hawaii), the Caribbean, Canada, Europe and remaining regions.

**Note:** for purposes of this report, FAR Part 135 flight data represents all flight activity of aircraft on a Part 135 charter certificate regardless of individual flight mission (excluding cargo, scheduled Part 135, and fractional operators).

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## EUROPEAN ACTIVITY REVIEW

European flight activity remained mostly status quo for the month. Activity was down 9.4% but remained in a similar trajectory from prior months. Further declines are expected next month as the busy summer season winds down.

Acft Type	Aug 23 vs Aug 22	Aug 23 vs Jul 23
Turbo Prop	-8.8%	-12.9%
Small Cabin Jet	-9.1%	-13.8%
Mid Size Cabin Jet	-7.7%	-14.7%
Large Cabin Jet	-11.3%	-21.4%
Total	-9.4%	-16.1%

## AFRICA, ASIA, AUSTRALIA, SOUTH AMERICA ACTIVITY REVIEW

These regions hovered around 50,000 business aviation flights during the month of August, decreasing 2.9% from July. This marks the 3<sup>rd</sup> month in a row that activity has decreased month over month. Overall activity remained positive, finishing up 4.6% year over year.

Acft Type	Aug 23 vs Aug 22	Aug 23 vs Jul 23
Turbo Prop	2.8%	-1.1%
Small Cabin Jet	4.6%	-2.9%
Mid Size Cabin Jet	5.3%	-7.0%
Large Cabin Jet	7.4%	-3.4%
Total	4.6%	-2.9%

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### Global Flight Activity Heat Map

