

27 January 2022



# EUROCONTROL

Comprehensive Assessment

# EUROPEAN AVIATION



SUPPORTING EUROPEAN AVIATION



NETWORK  
MANAGER





# Headlines (Week of 20 – 26 Jan 2022)

- 16,093 daily flights on average over past week, 3% fewer than in the previous week ; 63% of 2019 levels.
- Over the first weeks of 2022, European traffic is recording major flight reductions as the Omicron wave continues, slackening the expected recovery: airlines have been reducing their capacities week after week. Also, main airports in Turkey and Greece experienced inclement weather over recent days.
- Over past week, Ryanair was the busiest Aircraft Operator with 1,222 flights/day, followed by Turkish Airlines (795), Lufthansa (664), Air France (632) and KLM (551).
- Domestic traffic vs 2019: Europe (-37%), USA (-16%), China (-28%), and Middle-East (-16%).
- Flights to/from Europe (intercontinental flows) are at -38% vs 2019.
- Jet fuel prices continued to surge, reaching 247 cts/gallon, a 20% increase in price within a month.
- Charter (+37%), All-cargo (+8%) and Business Aviation (+7%) are above 2019 levels. The two other segments are still far below 2019 levels with: Traditional at -43% vs 2019 and Low-cost at -53%.

## Traffic Situation

Average daily flights (including overflights)

Over the last 7 days

# 63%

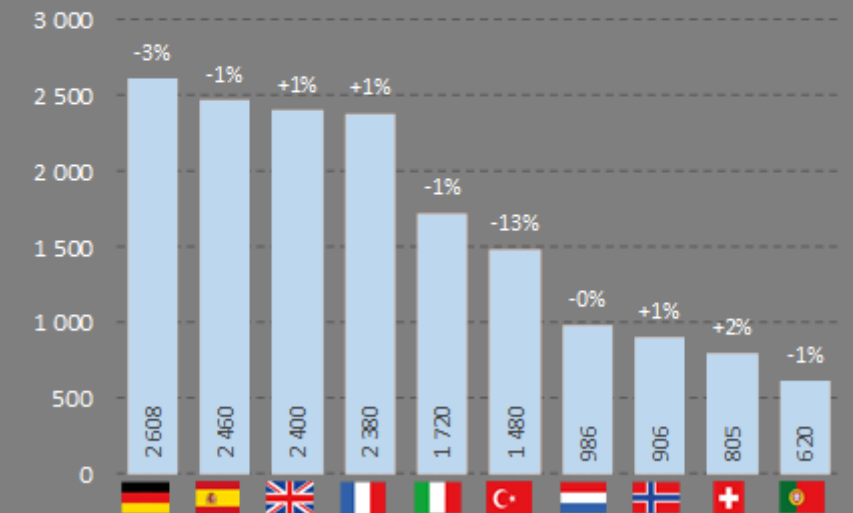
of equivalent week in 2019

## Top 10 Aircraft Operators on Week 20 Jan - 26 Jan 2022 (avg daily flights)

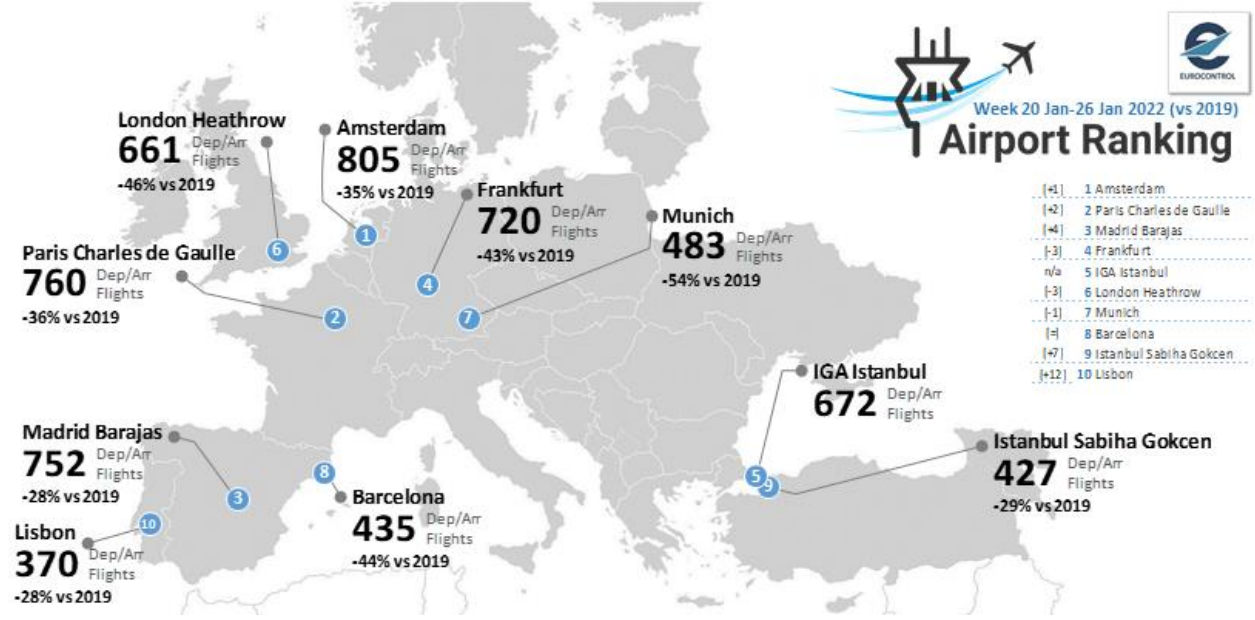


## Top 10 Busiest States

on week 20 - 26 Jan 2022 (avg daily flights)  
(Dep/Arr flights and comparison with previous week)

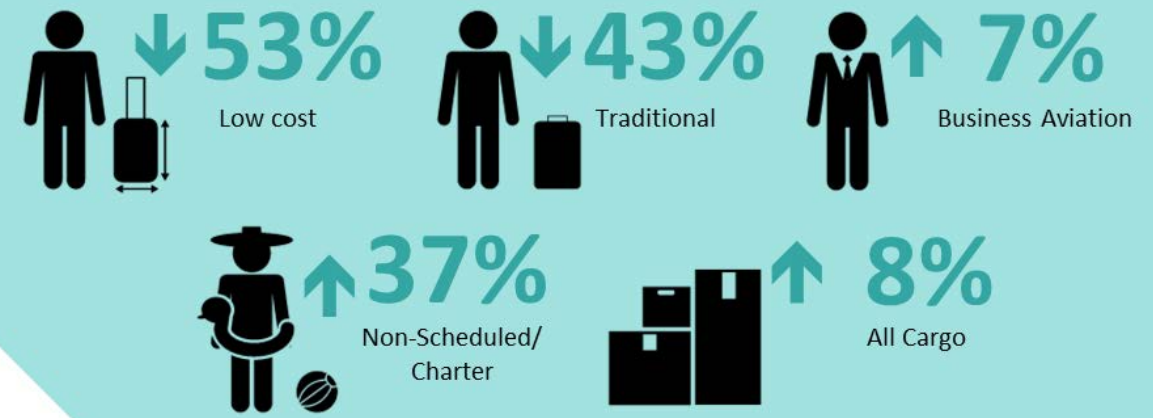


# Top 10 Busiest Airports



## Market Segments

on week 20 Jan – 26 Jan 2022 (vs 2019)



## Traffic Flow

Average daily flight on week of 20 - 26 Jan 2022

	Flights	vs previous week	vs 2019
Intra-European	12 297	-2%	-37%
Intercontinental	3 228	-5%	-38%

## Route charges

(December 2021)

Amount billed:

**€ 448 million**

Jan-Dec 2021 amount billed:

**€ 4,162 million**

vs. Jan-Dec 2019

**↓ (-47%)**

Source: EUROCONTROL

## Economics

(21 January 2022)

Fuel price

**↑ 247**

**Cents/gallon**

compared to

**233 cents/gallon on 7 Jan 2022**

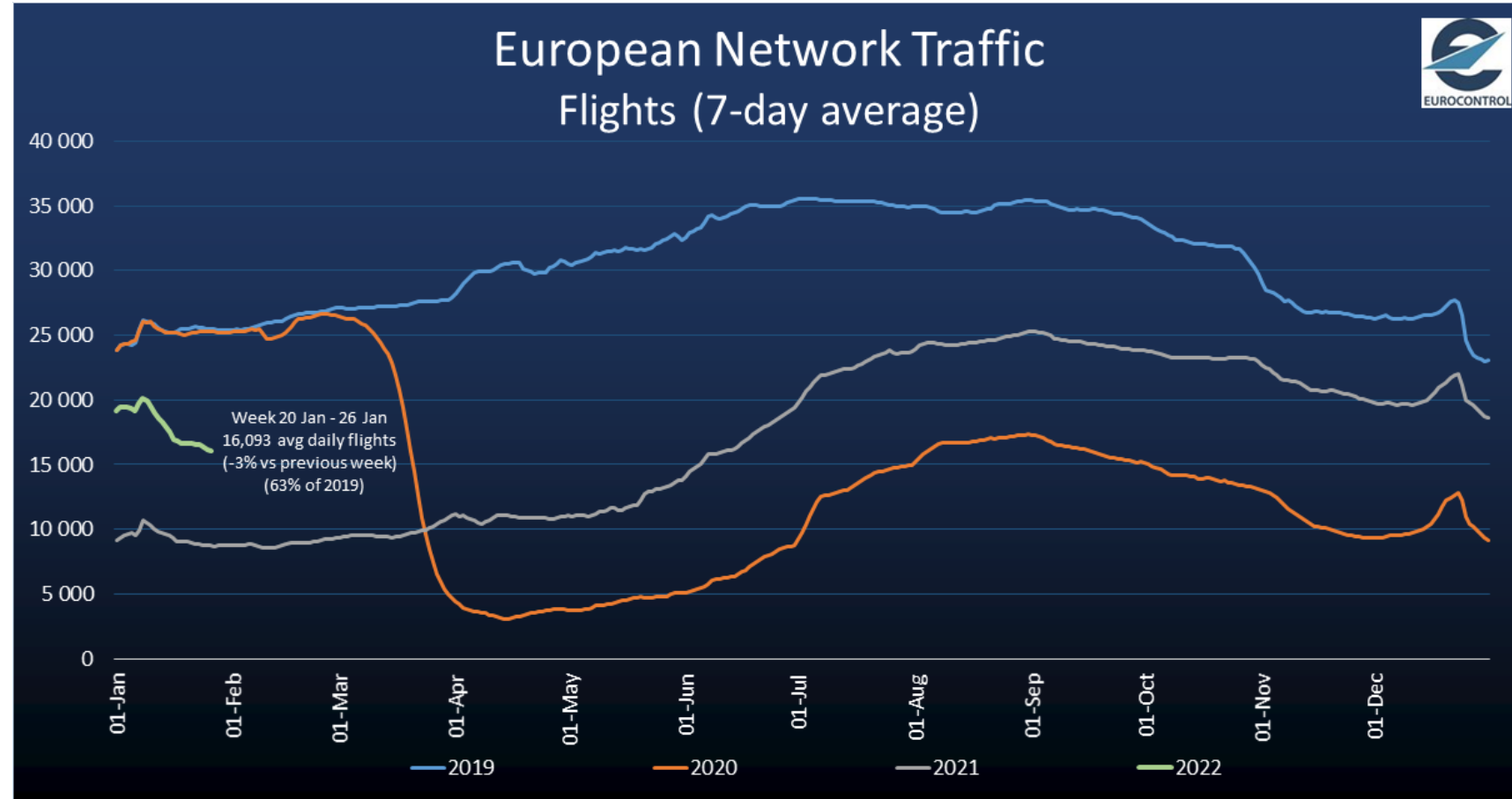
Source: IATA/Platts

# Overall traffic situation at network level



## On week 20 – 26 January:

- ✈ **16,093** average daily flights.
- ✈ **-3%** vs previous week.
- ✈ **63%** of 2019 traffic levels.

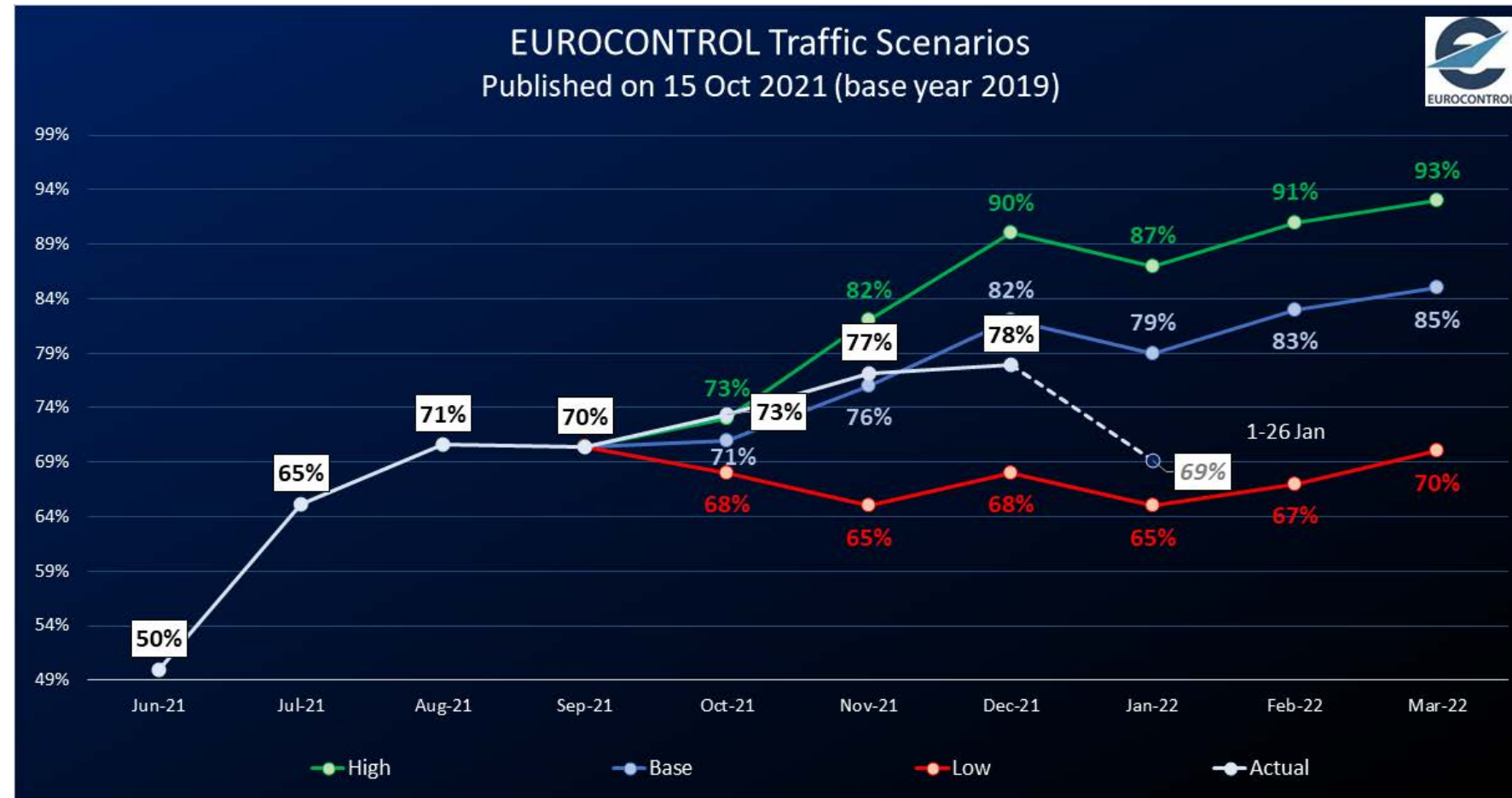




# Current situation compared to the latest EUROCONTROL traffic scenarios

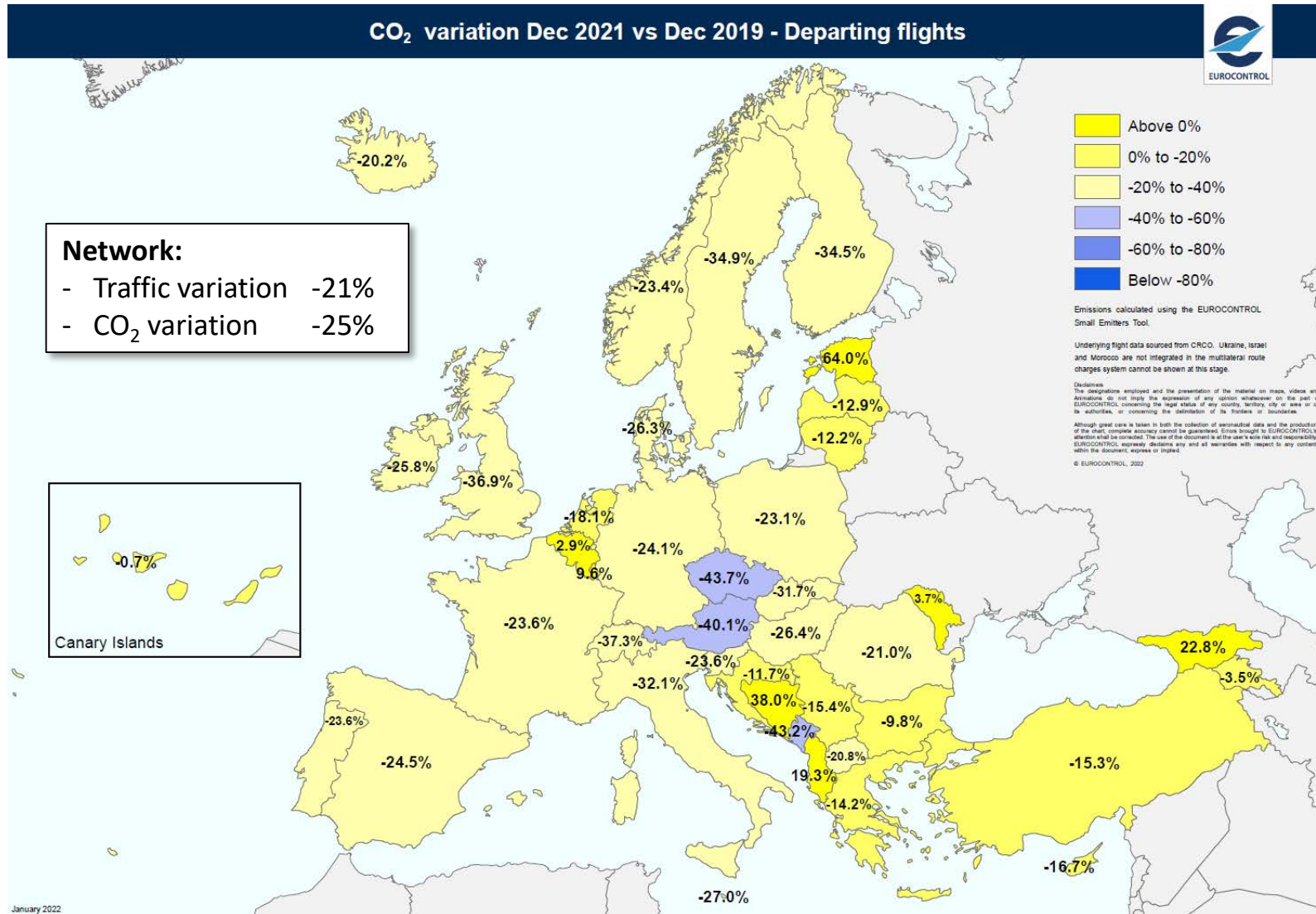


- ✂ For the first 26 days of January 2022, **network traffic** was at **69%** compared to same period in 2019.
- ✂ Network traffic is in line with the low scenario of the EUROCONTROL traffic scenarios published on 15 October 2021.



# Aviation Sustainability

## Map

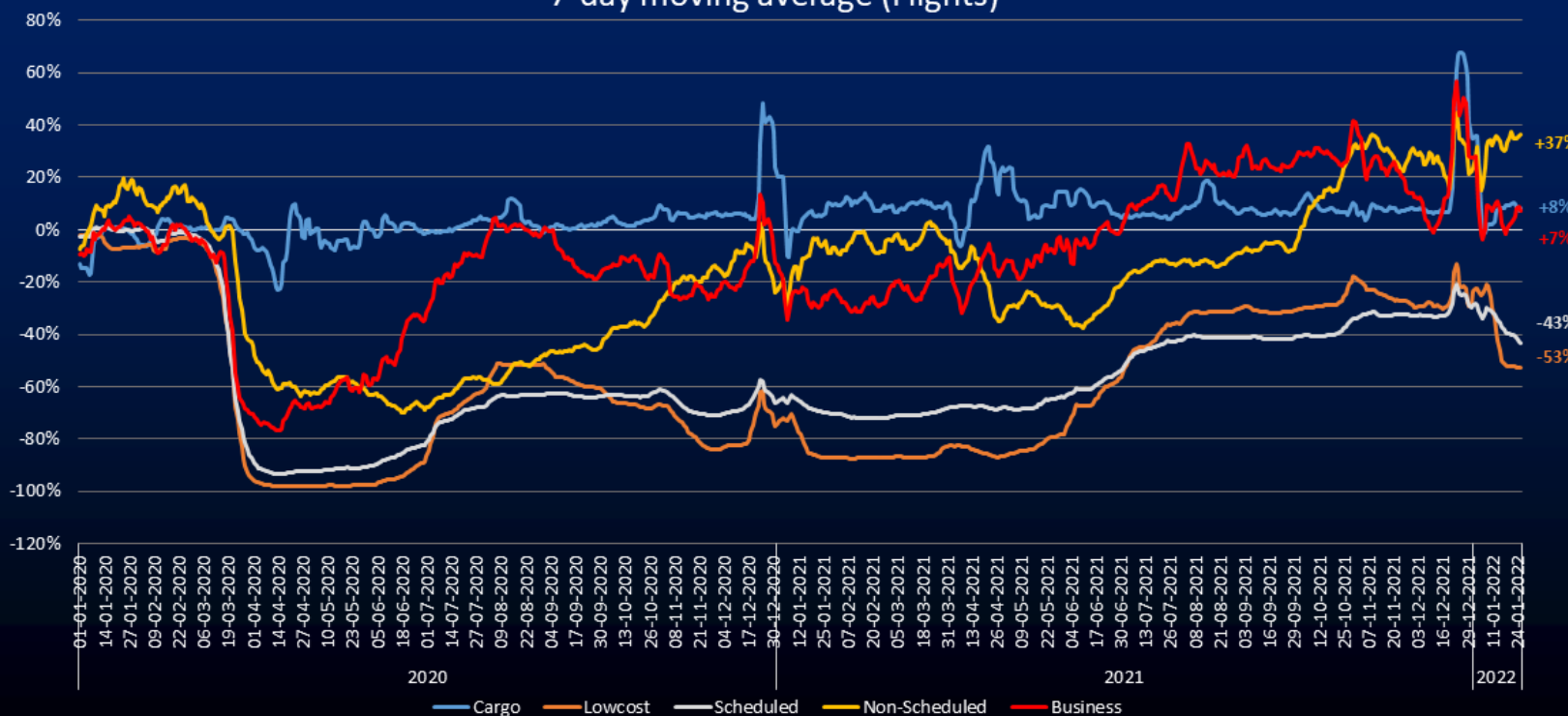


January 2022



# Market Segments

Market segments in EUROCONTROL Network  
(compared with equivalent days in 2019)  
7-day moving average (Flights)



On the last 7 days, compared to 2019:

- ✘ Three segments are above 2019 levels: **All-cargo (+8%)**, and **Charter (+37%)** and **Business Aviation (+7%)**.
- ✘ **Traditional** continued to decline posting **-43%** vs 2019 while **Low-Cost**, are decreasing even more rapidly reaching **-53%** vs 2019, drastically reacting to the emergence of the new variant and tightened travel restrictions.

# Aircraft operators (Average daily flights for the last week)



## Top 10

Top 10 Aircraft Operators	Week 20 - 26 Jan 2022		
	Average flights per day	% vs 2019	% over previous week
RYANAIR	1 222	-36%	1%
TURKISH AIRLINES	795	-37%	-18%
Lufthansa	664	-52%	-6%
AIRFRANCE	632	-42%	-2%
KLM Royal Dutch Airlines	551	-22%	-1%
easyJet	475	-61%	0%
Wizz	361	-22%	-10%
BRITISH AIRWAYS	354	-57%	-4%
Scandinavian Airlines	332	-54%	-3%
PEGASUS	311	-31%	-5%

✘ **Ryanair** is the busiest Aircraft Operator with 1,222 flights per day on average over last week, followed by **Turkish Airlines** (795), **Lufthansa** (664), **Air France** (632) and **KLM** (551).

Within the top 10, all but two airlines posted **decreases** over the week before, highest being:

- ✘ **Turkish Airlines** (-180 flights; -18%) with decreases on domestic flows and flows from to Istanbul (airport closed for 4 days due to inclement weather).
- ✘ **Wizz Air** (-40 flights; -10%) due to decreases on Poland-UK, Germany-Romania, Italy-Romania and domestic Italy.
- ✘ **Lufthansa** (-39 flights; -6%) mainly due to flows Germany-Italy, France-Germany, Germany-US and Germany-Spain.

Over the top 10, **two airlines remained stable** on previous week:

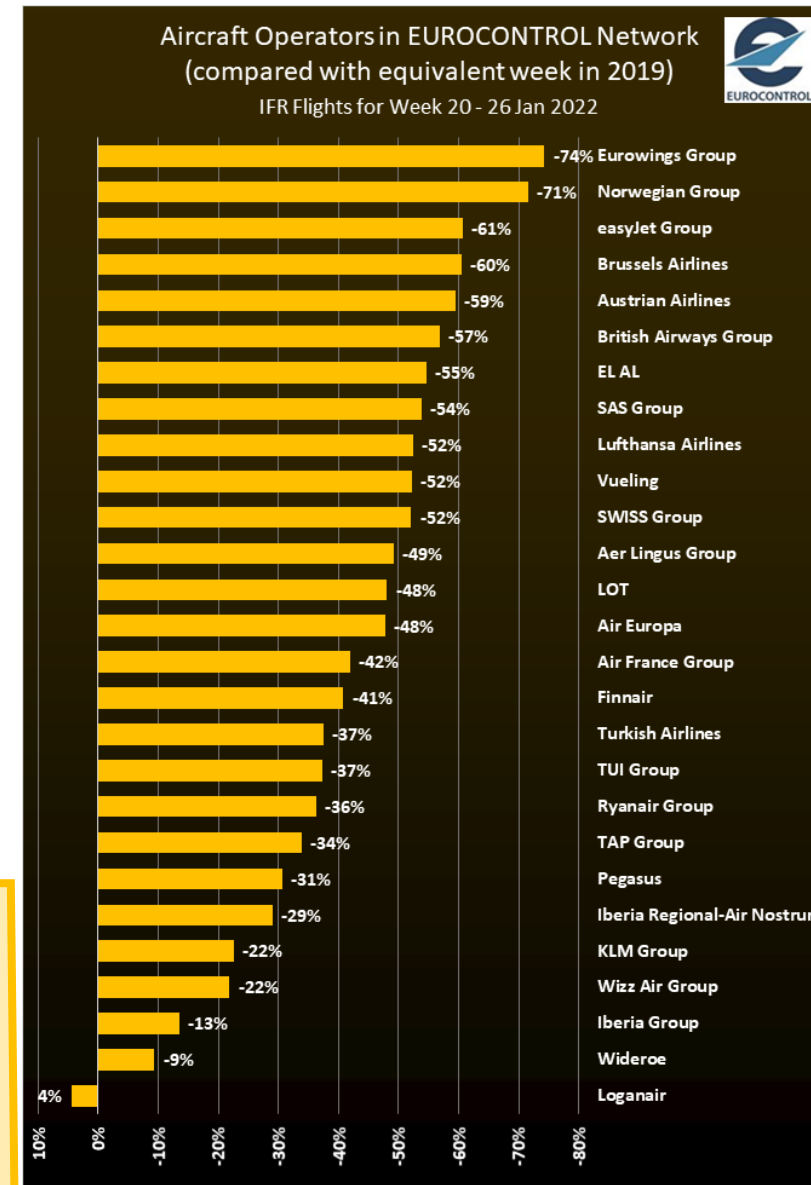
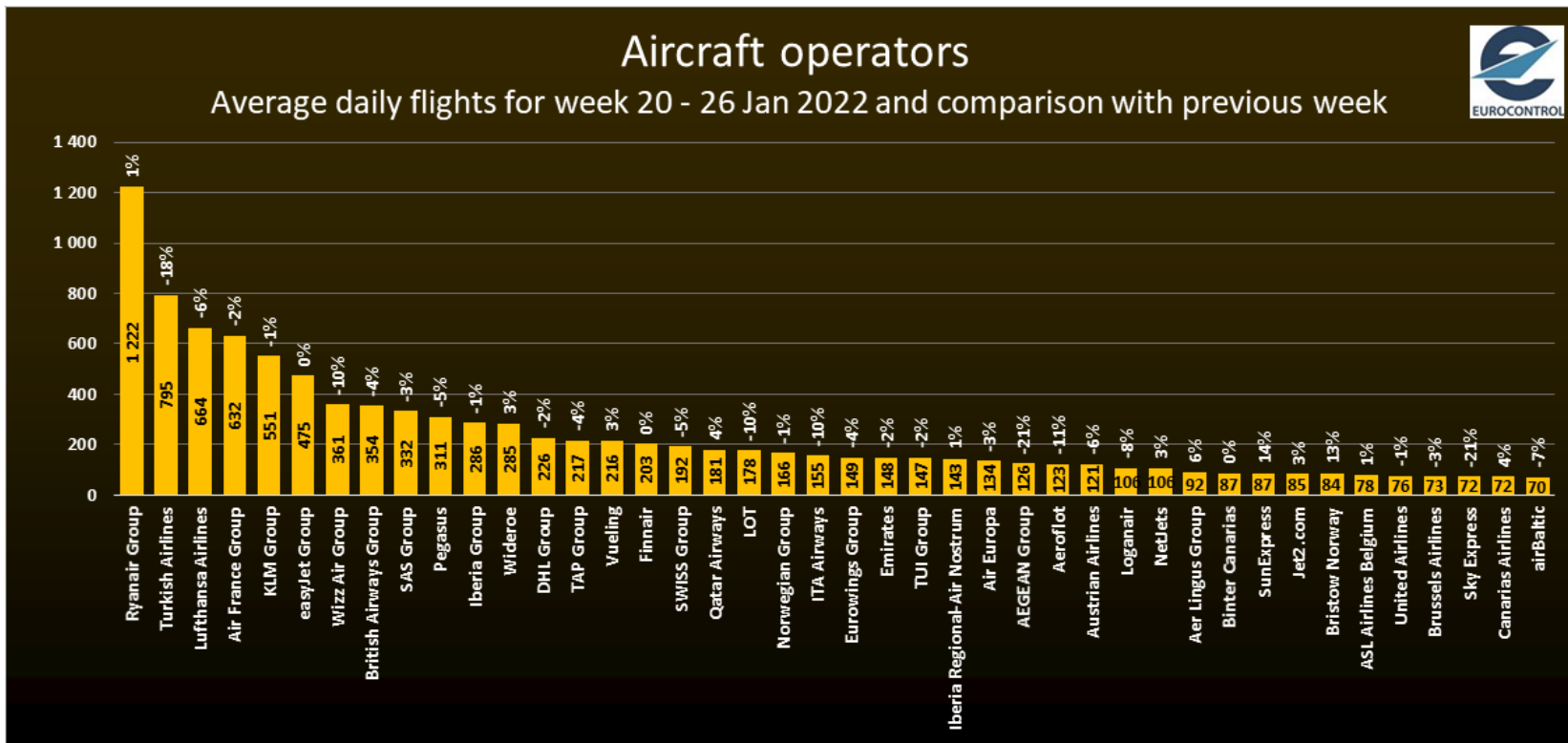
- ✘ **Ryanair** (+7 flights; +1%), **easyJet** (0 flights; +0%)



# Aircraft operators (Average daily flights for the last week)



## Top 40



- ✘ Largest decreases in flights for **Turkish Airlines** (-18%), **Wizz Air** (-10%), **Lufthansa** (-6%) and **Aegean** (-21%).
- ✘ Highest increases for operators **SunExpress** (+14%) and **Bristow Norway** (+13%).
- ✘ Traffic levels ranging from -74% (**Eurowings**) to +4% (**Loganair**) vs 2019.

# Aircraft operators (Average daily flights for the last week)

Cargo, Legacy, Low Costs and Regional Carriers



## PERFORMANCE OF MAJOR CARGO CARRIERS

for the week 20-26 January 2022



## PERFORMANCE OF MAJOR LOW-COST CARRIERS

for the week 20-26 January 2022



## PERFORMANCE OF MAJOR LONG-HAUL/LEGACY CARRIERS

for the week 20-26 January 2022



## PERFORMANCE OF MAJOR REGIONAL CARRIERS\*

for the week 20-26 January 2022



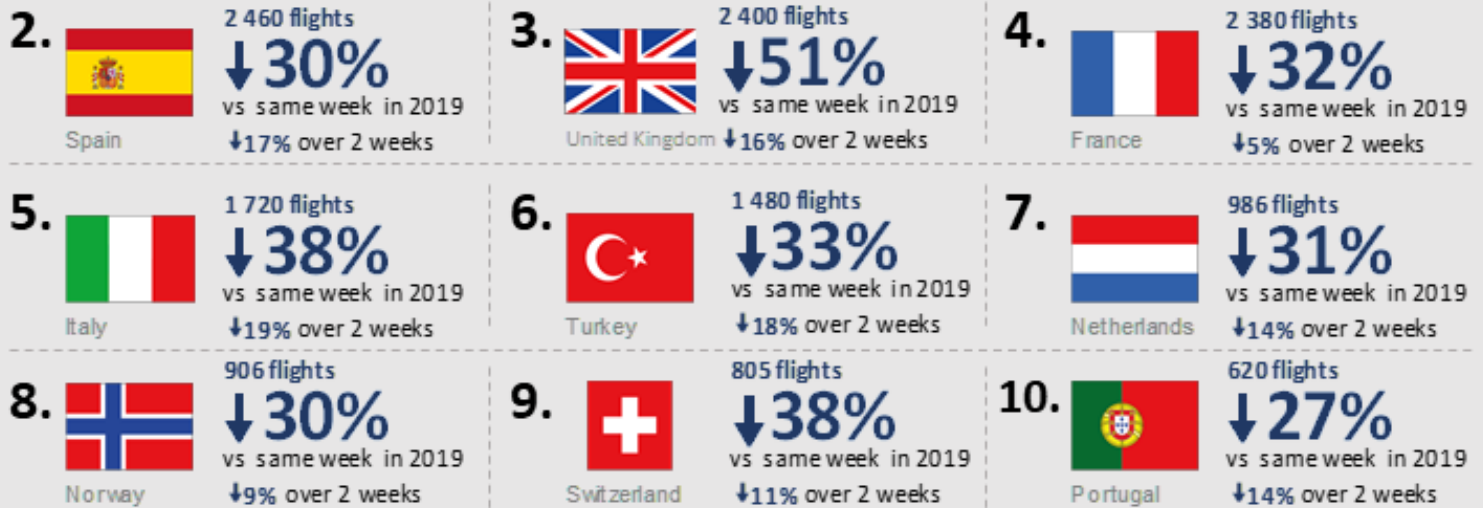
\*REGIONAL AIRLINES USING SEPARATE IATA CODES

# States (Average Daily Departure/Arrival flights for the last week)



## Top 10 States

on week 20 - 26 Jan 2022 (avg daily dep/arr)



✘ **Germany** is the State with the highest number of dep/arr flights on average over last week (2,608) followed by **Spain** (2,460), **UK** (2,400), **France** (2,380) and **Italy** (1,720).

✘ Comparing with two weeks ago, the ranking remained stable except Portugal which moved before Poland.

Within the top 10, all States posted flight decreases over the past two weeks.

Main decreases over past week were observed in:

✘ **Turkey** (-230 flights; -13%) owing to Turkish Airlines mainly. Flights were suspended as Istanbul airport was affected by heavy snowfalls in Turkey.

✘ **Greece** (-85 flights; -19%) mainly due to Olympic and Sky Express. Domestic (and international) flows were affected by inclement weather (snow) too.

✘ **Germany** (-79 flights; -3%) owing to Lufthansa mainly on flows with Turkey, Italy and Spain.

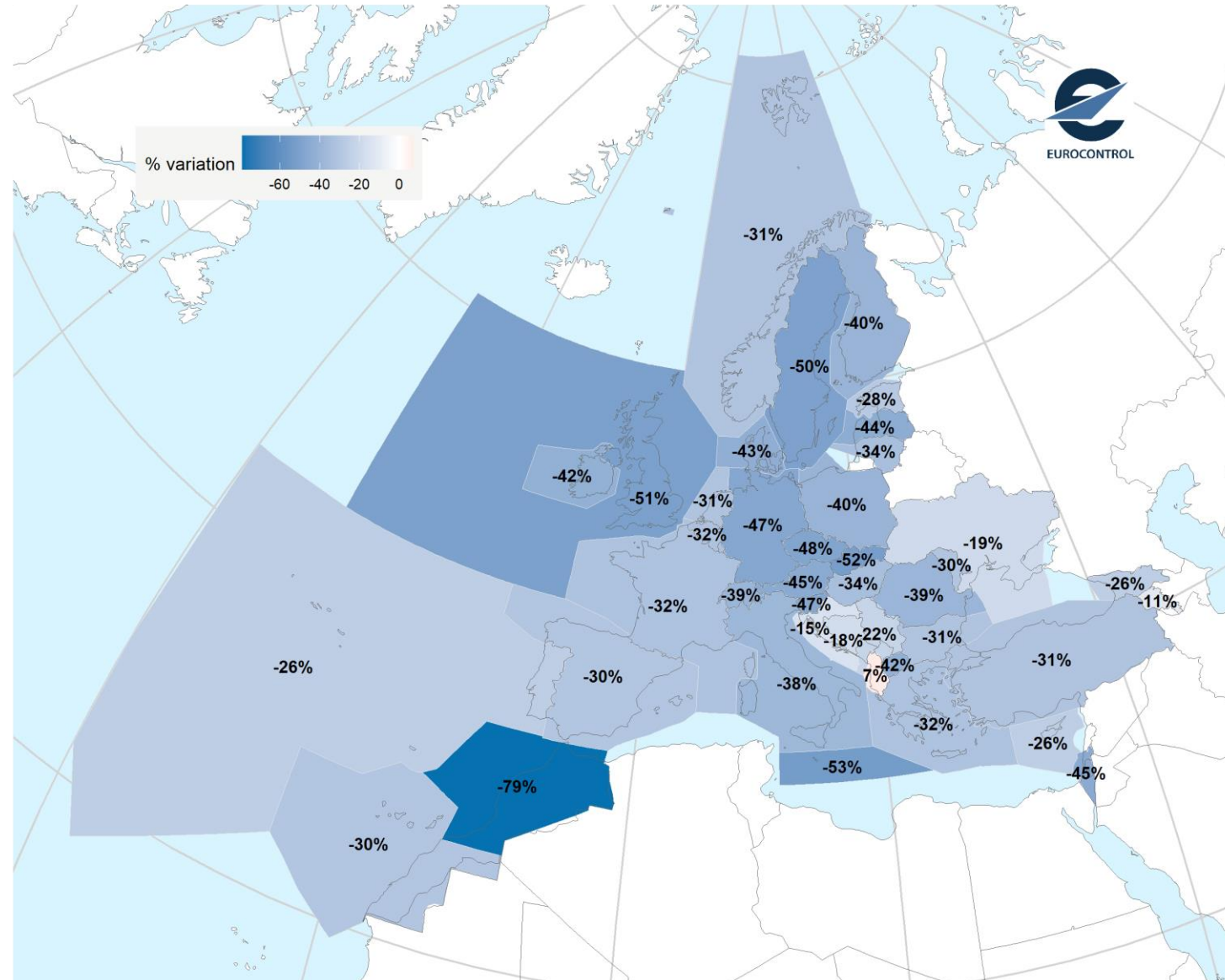
✘ **Poland** (-43 flights; -7%) mainly due to light AO, LOT and Wizz Air. Domestic flows, flows with Germany and Switzerland.



# States (Average Daily Departure/Arrival flights for the last week)

Map

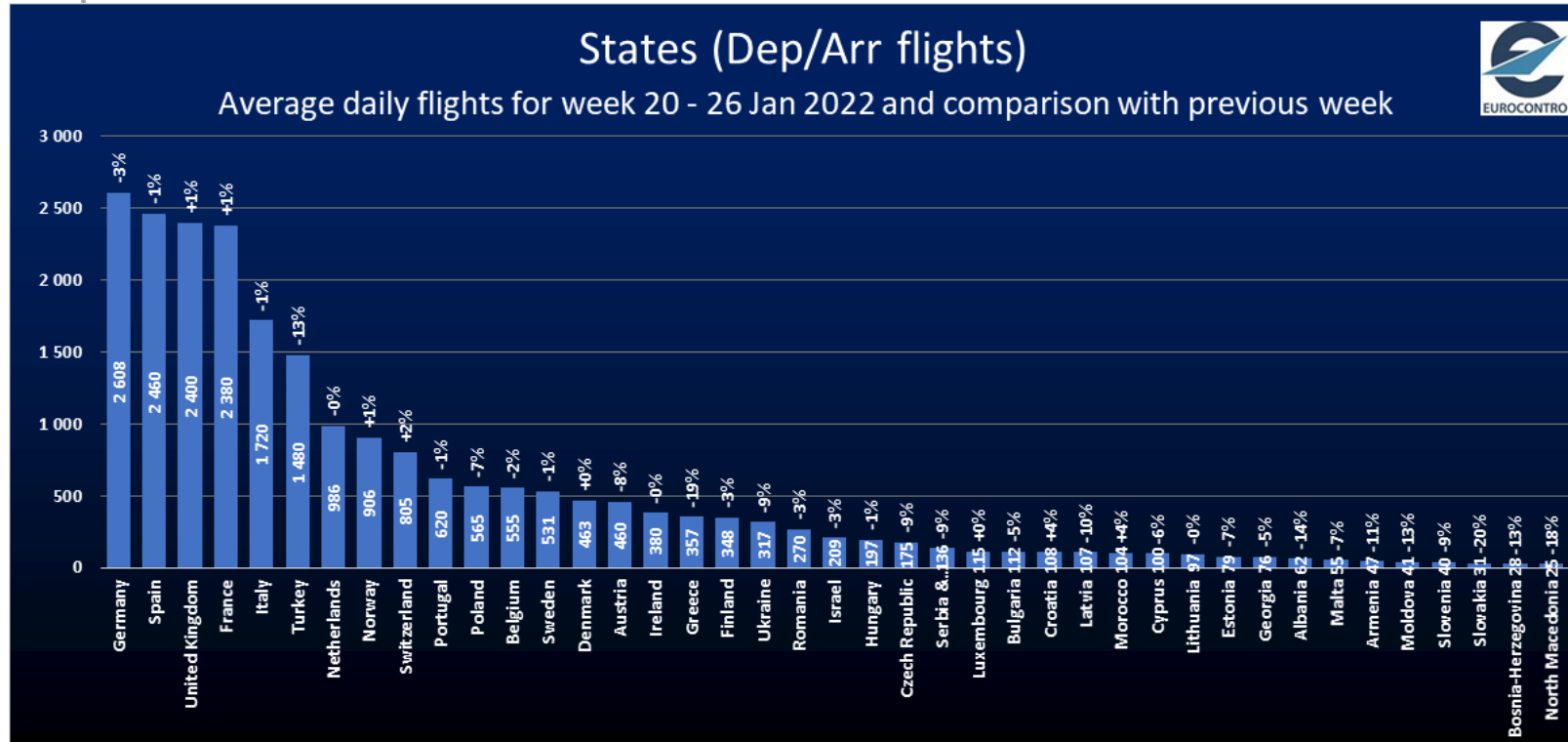
State FIR daily % arrivals/departures variation vs 2019 on 2022-01-25  
7-day average - FIRs at altitude FL200



The designations employed and the presentation of the material on maps, videos and animations do not imply the expression of any opinion whatsoever on the part of EUROCONTROL concerning the legal status of any country,

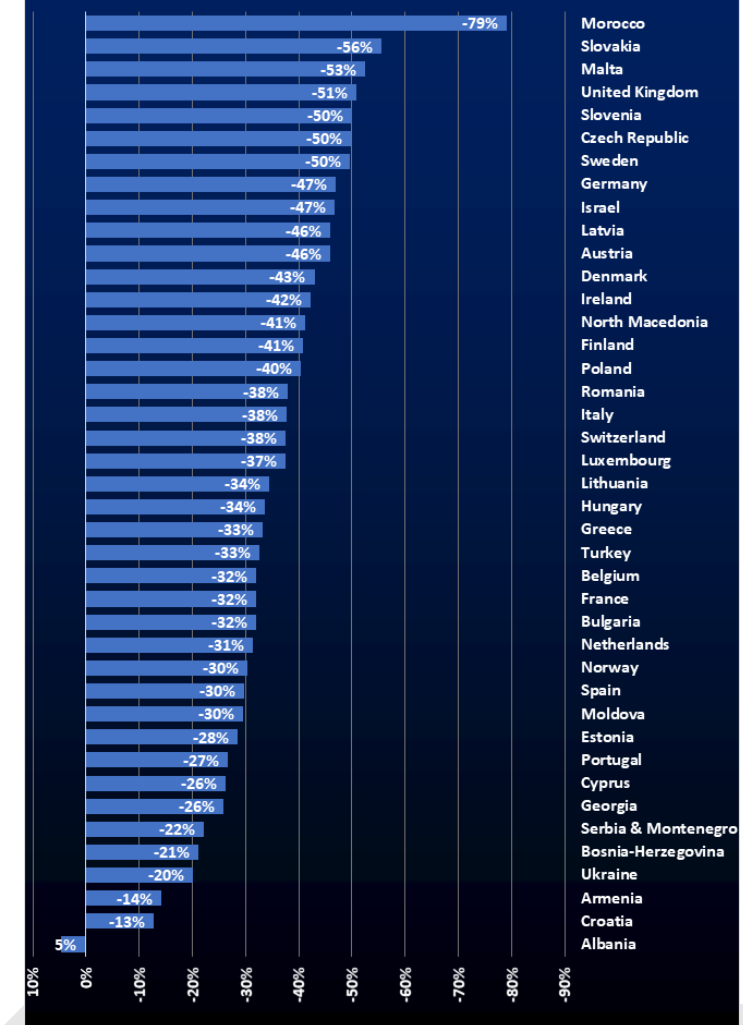
# States (Average Daily Departure/Arrival flights for the last week)

Top 40



### States in EUROCONTROL Network (compared with equivalent week in 2019)

IFR Dep/Arr Flights for Week 20 - 26 Jan 2022



✘ Highest decreases in flights for **Turkey** (-13% over previous week) and **Greece** (-19%) : both States affected by heavy snowfall over the recent days. Then, **Germany** posted a decrease too (-3%).

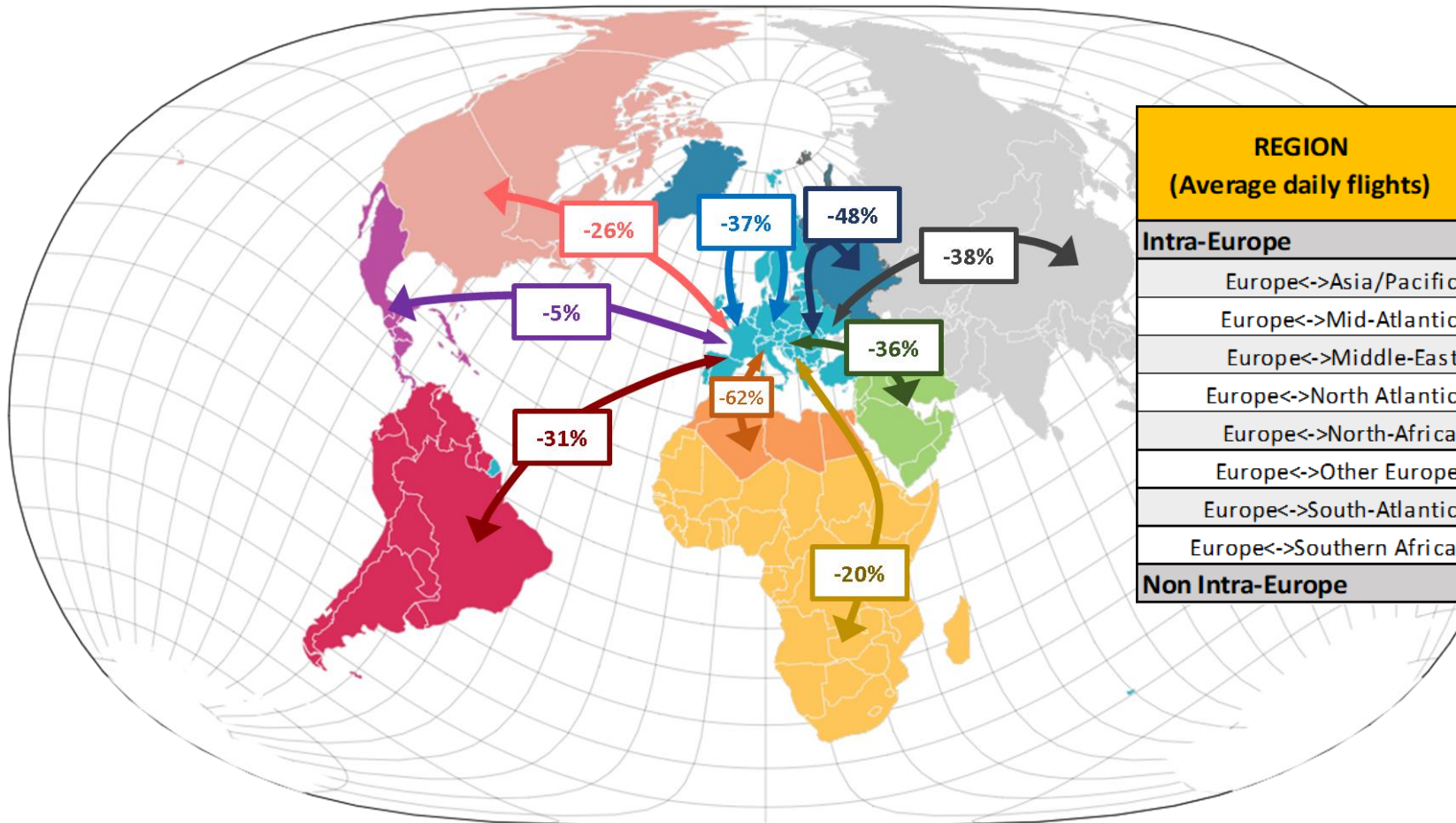
✘ Highest (modest) increase for **France** (+1%) and the **UK** (+1%).

✘ Traffic levels ranging from -79% (**Morocco**) to 5% (**Albania**), compared to 2019.

# Traffic flows (Average Daily Departure/Arrival flights for the last week)



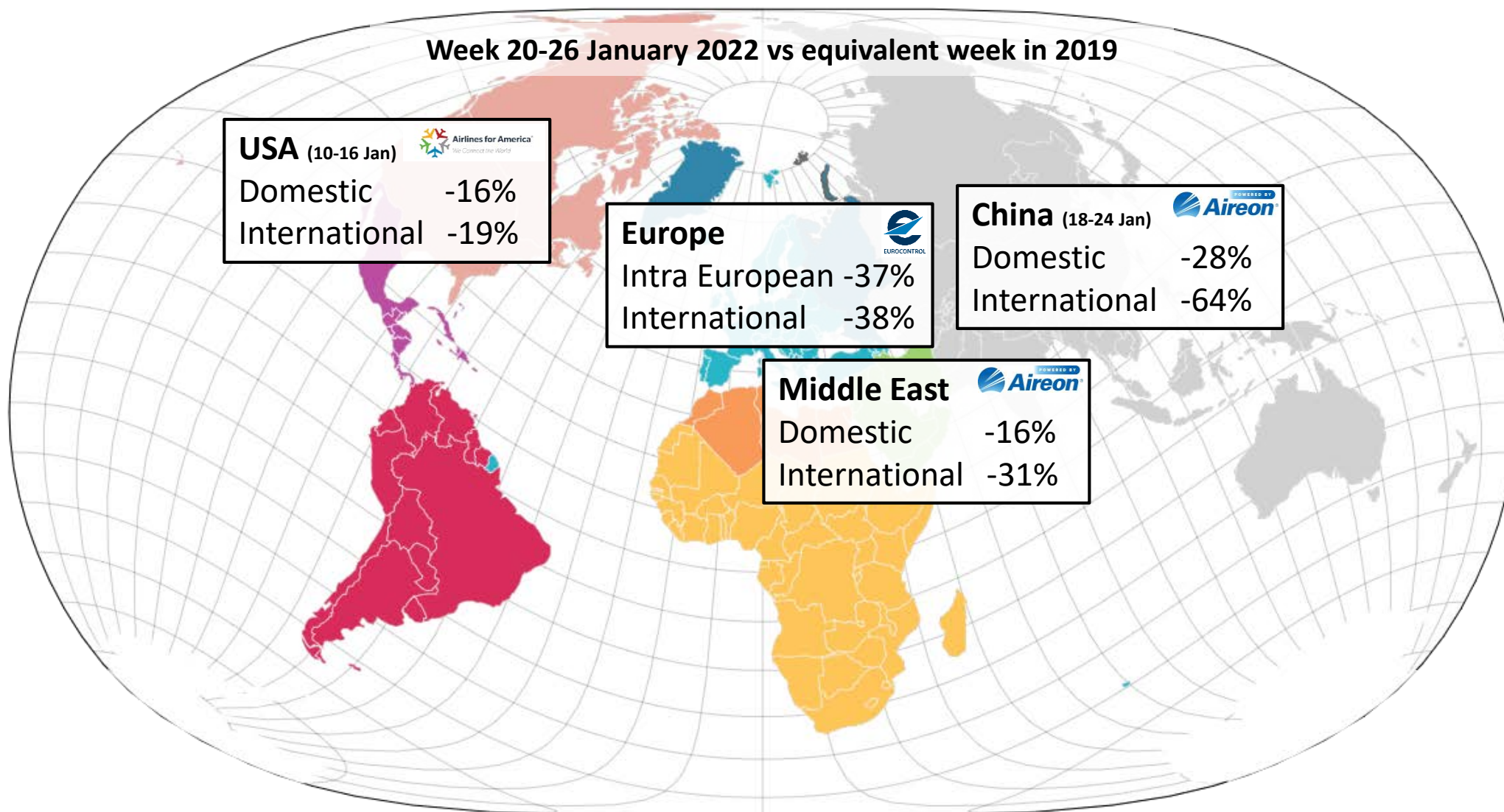
- ✘ The main traffic flow is the intra-Europe flow with 12,297 flights on average the most recent week, which is decreasing (-2%) over previous week.
- ✘ Intra-Europe flights are at -37% compared to 2019 while intercontinental flows are at -38%.



REGION (Average daily flights)	Week 13/01/2022 - 19/01/2022	Week 20/01/2022 - 26/01/2022	%	vs. 2019
<b>Intra-Europe</b>	<b>12 605</b>	<b>12 297</b>	<b>-2%</b>	<b>-37%</b>
Europe<->Asia/Pacific	500	482	-3%	-38%
Europe<->Mid-Atlantic	194	184	-5%	-5%
Europe<->Middle-East	847	810	-4%	-36%
Europe<->North Atlantic	690	659	-4%	-26%
Europe<->North-Africa	343	327	-5%	-62%
Europe<->Other Europe	418	388	-7%	-48%
Europe<->South-Atlantic	125	123	-1%	-31%
Europe<->Southern Africa	268	254	-5%	-20%
<b>Non Intra-Europe</b>	<b>3 386</b>	<b>3 228</b>	<b>-5%</b>	<b>-38%</b>



# Outside Europe (traffic situation over the last week vs 2019)



# Long haul Airport-Pairs (Average Daily flights for the last week)



Top 20

Rank evolution over prev. week	Top 20 Long Haul Airport-Pairs on week 20 - 26 Jan 2022				
	Airport-Pair	Avg daily flights	Δ vs prev. week	% vs prev. week	% vs 2019
→	London/Heathrow <-> New York JFK	25	↓	-2	-7%
→	London/Heathrow <-> Dubai	16	→	-1	-3%
↗	Paris/Charles-De-Gaulle <-> New York JFK	12	→	+0	+0%
→	Frankfurt <-> Seoul/Inchon INTL	12	→	-0	-2%
→	Paris/Charles-De-Gaulle <-> Dubai	12	→	+0	+3%
↗	London/Heathrow <-> Delhi	10	↗	+1	+17%
↗	Amsterdam <-> Dubai	10	→	+1	+6%
↓	London/Heathrow <-> Los Angeles	9	→	-0	-2%
↓	Frankfurt <-> Shanghai Pudong Intl	9	→	-1	-9%
↗	Milan/Malpensa <-> New York JFK	9	→	+1	+9%
↓	Madrid/Barajas <-> Bogota Intl/Eldorado	9	→	-0	-2%
↗	London/Heathrow <-> Hamad INTL	8	→	+0	+4%
↓	Frankfurt <-> Chicago O Hare Intl	8	→	-0	-2%
↓	London/Heathrow <-> Chicago O Hare Intl	8	→	+0	+0%
↗	Amsterdam <-> Shanghai Pudong Intl	8	→	+0	+2%
↗	Madrid/Barajas <-> Mexico City	8	→	+0	+0%
↗	Frankfurt <-> Dubai	8	→	-0	-4%
↗	London/Heathrow <-> Shanghai Pudong Intl	7	→	+1	+13%
↓	Paris/Orly <-> Pointe-A-Pitre/Le Ra	7	→	-1	-10%
↓	London/Heathrow <-> Miami Intl/Florida	7	→	-1	-7%

Within the top 20, long-haul airport pairs, over last week:

Highest increases compared to the week before for:

- ✘ London Heathrow- Delhi (+17%)
- ✘ London Heathrow- Shanghai (+13%)
- ✘ Milan – New York JFK (+9%)

Highest decreases compared to the week before for:

- ✘ Paris Orly – Point-à-Pitre (-10%)
- ✘ Frankfurt – Shanghai (-9%)
- ✘ London Heathrow – New York (-7%)
- ✘ London Heathrow – Miami (-7%)

# Country pairs (Average Daily flights for the last week)

## Top 10



Rank evolution over prev. week	Top 10 Country-Pair on week 20 - 26 Jan 2022				
	Country-Pair	Avg daily flights	Δ vs prev. week	% vs prev. week	% vs 2019
→	Spain <-> Spain	832	↓ -2	-0%	↓ -22%
→	France <-> France	796	↑ +11	+1%	↓ -20%
↑	Norway <-> Norway	615	↑ +18	+3%	↓ -18%
↓	Turkey <-> Turkey	576	↓ -33	-5%	↓ -40%
→	United Kingdom <-> United Kingdom	564	↓ -8	-1%	↓ -40%
→	Italy <-> Italy	563	↓ -8	-1%	↓ -20%
→	Germany <-> Germany	430	↑ +9	+2%	↓ -52%
↑	Spain <-> United Kingdom	239	→ +0	+0%	↓ -47%
↓	Germany <-> Spain	234	↓ -10	-4%	↓ -39%
↑	Sweden <-> Sweden	202	↑ +3	+2%	↓ -46%

Within the top 10, **highest decreases** over previous week for:

- ✘ **Turkey-Turkey** (-33 flights; -5%) owing to many airlines (including Turkish) suspending flights due to heavy snow.
- ✘ **Germany-Spain** (-10 flights; -4%) owing to Lufthansa, Corendon, Condor and Ryanair.

### Highest increases for

- ✘ **Norway-Norway** (+18 flights; +3%) mainly due to Wideroe and Bristow Norway (helicopters).
- ✘ **France-France** (+11 flights; +1%) mainly due to training flights, Air France and light aircraft operators.
- ✘ **Germany-Germany** (+9 flights; +2%) mainly due to light aircraft operators and Lufthansa.

✘ 8 of the top 10 flows are domestic.

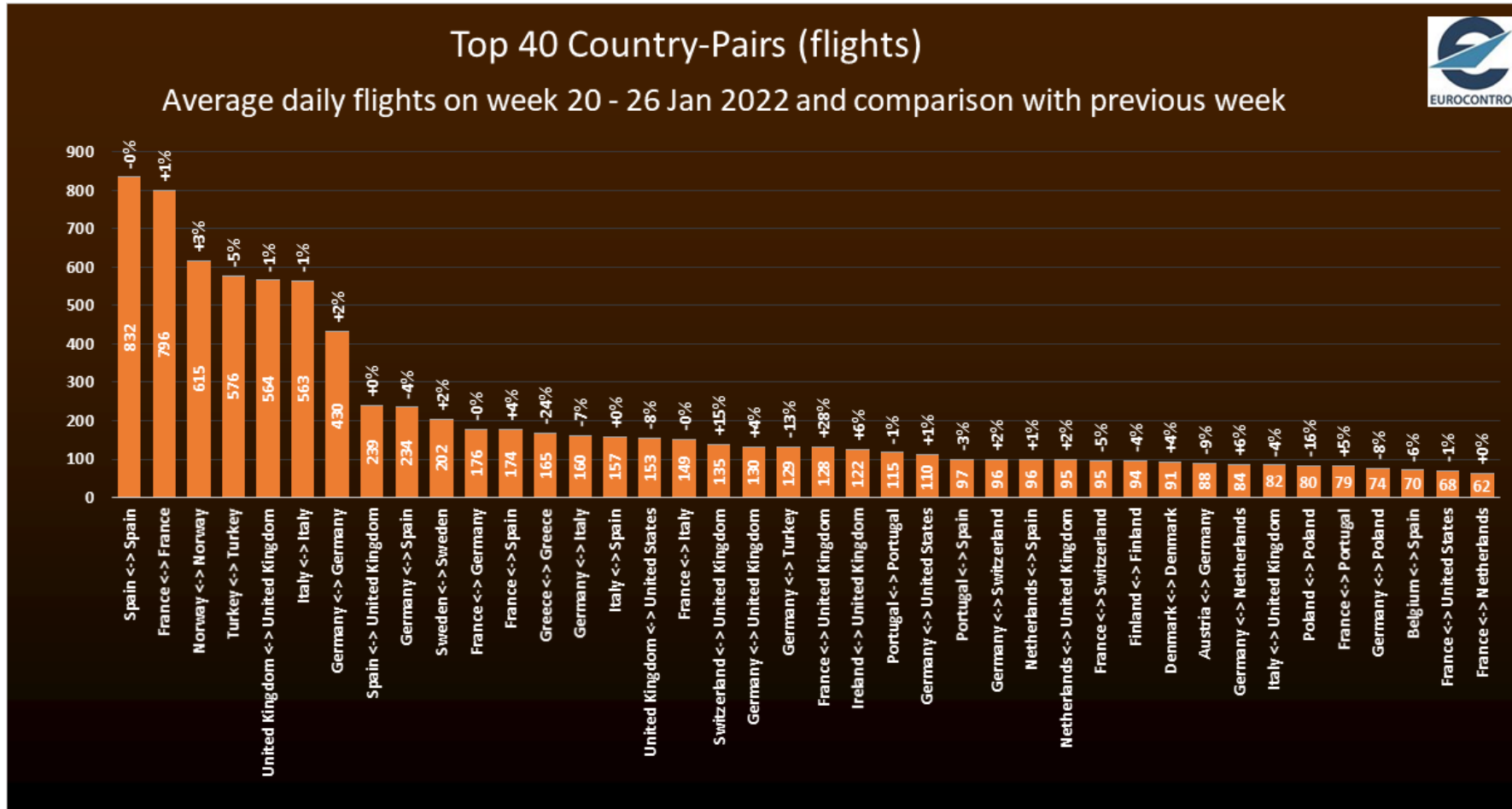
✘ **Spain-Spain** is the country-pair with the highest number of dep/arr flights (832) followed by **France-France** (796), **Norway-Norway** (615), **Turkey-Turkey** (576), **UK-UK** (564), **Italy-Italy** (563), **Germany-Germany** (430) and **Sweden-Sweden** (202).

✘ Over the previous, domestic flows in Norway, Sweden as well as flows between Spain and UK increased their ranking.



# Country pairs (Average Daily flights for the last week)

Top 40



- ✘ Highest increase in flights for **France-UK** (+28% over previous week), followed by **Norway-Norway** (+3%) and **Switzerland-UK** (+15%).
- ✘ Highest decreases for **Greece-Greece** (-24%) and **Turkey-Turkey** (-5%): flights suspended due to snow blizzard.

# Airports (Average Daily Departure/Arrival flights for the last week)

## Top 10



Rank evolution over prev. Week	Top 10 Airports on week 20 - 26 Jan 2022				
	Airport	Average Daily Dep/Arr Flights	Δ over prev. week	% over prev. week	% vs 2019
↗	Amsterdam	805	↘ -17	-2%	↘ -35%
↗	Paris/Charles-De-Gaulle	760	↘ -32	-4%	↘ -36%
↗	Madrid/Barajas	752	↘ -9	-1%	↘ -28%
→	Frankfurt	720	↘ -48	-6%	↘ -43%
↘	IGA Istanbul Airport	672	↘ -204	-23%	↗ N/A
→	London/Heathrow	661	↘ -32	-5%	↘ -46%
→	Munich	483	↘ -17	-3%	↘ -54%
↗	Barcelona	435	↗ +3	+1%	↘ -44%
↘	Istanbul/Sabiha Gokcen	427	↘ -45	-10%	↘ -29%
↗	Lisbon	370	↘ -6	-2%	↘ -28%

Within the top 10, all airports recorded **decreases** over two weeks:

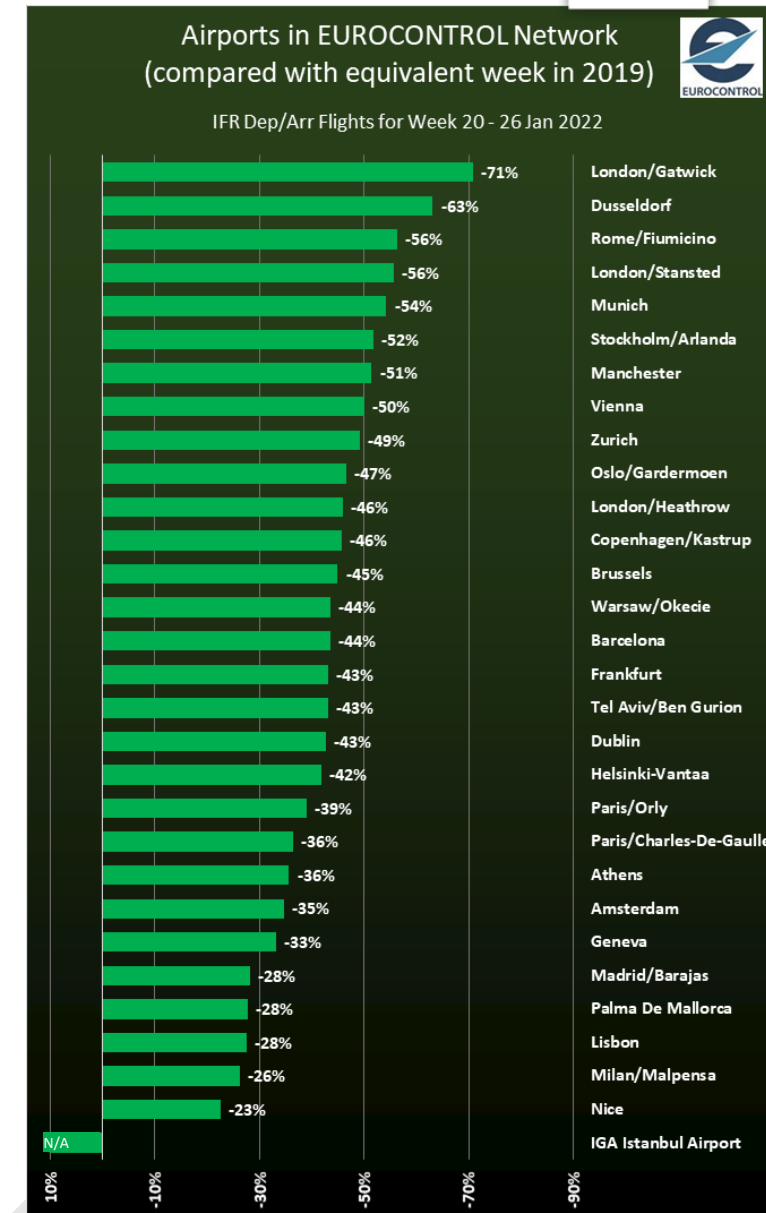
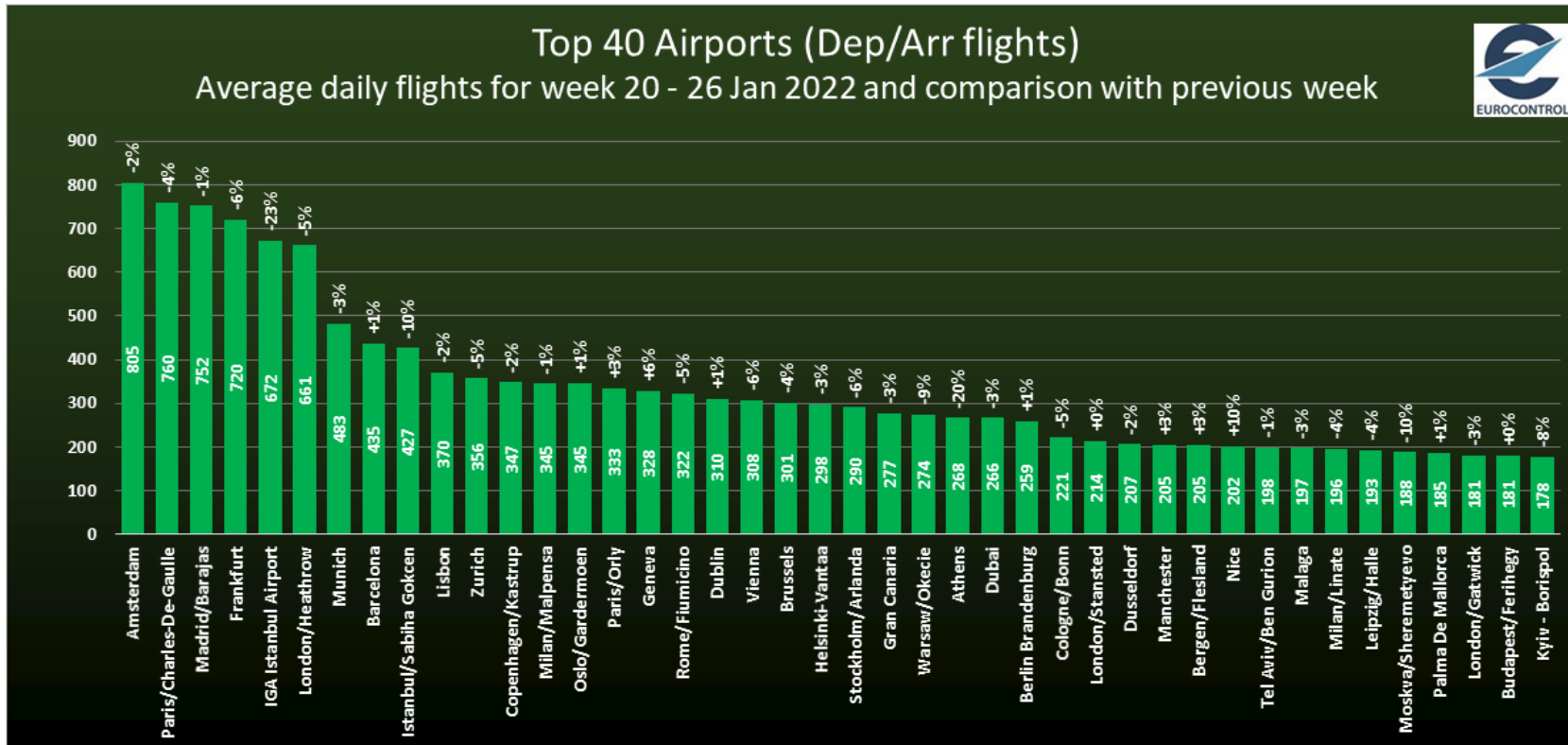
- ✘ **Istanbul IGA** (-200 flights; -23%) and Istanbul Sabiha/Gokcen (-45 flights; -10%) due to mainly airlines (airport closures due to snow).
- ✘ **Frankfurt** (-48 flights; -6%) owing to Lufthansa on flows between Germany and Spain, Italy or France.
- ✘ **London Heathrow** (-31 flights; -5%) mainly due to British Airways, its regional subsidiary and United Airlines on flows between UK and the US as well as domestic flows.

✘ **Amsterdam** is the airport with the highest number of dep/arr flights (805) followed by **Paris/CDG** (760), **Madrid/Barajas** (752), **Frankfurt** (720) and **Istanbul IGA** (672).

✘ **Istanbul** airports have moved down in the ranking compared to previous week due to the inclement weather.

# Airports (Average Daily Departure/Arrival flights for the last week)

## Top 40



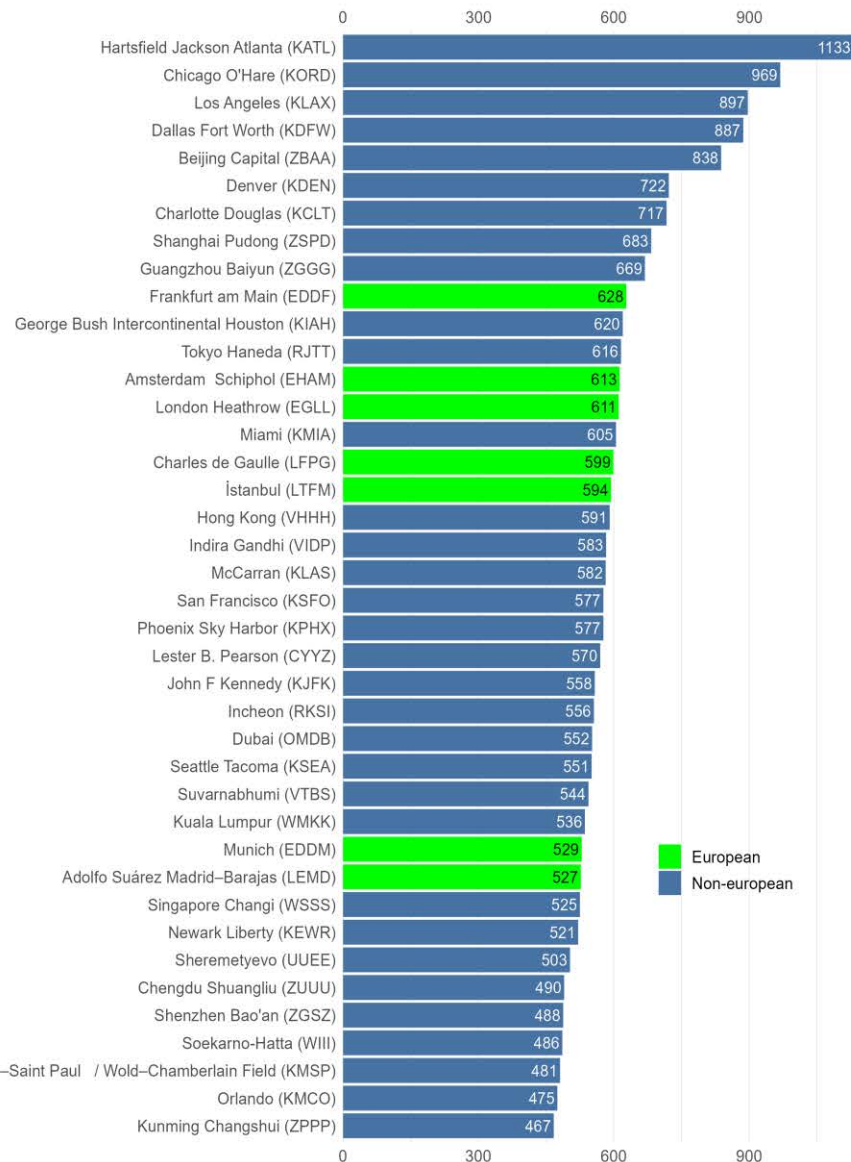
- ✘ Highest increases in flights for **Nice (+10%)**, **Geneva (+6%)** and **Paris/Orly (+3%)**.
- ✘ Highest decrease for **Istanbul IGA (-23%)**, **Athens (-20%)** and **Frankfurt (-6%)**.
- ✘ Traffic levels ranging from -71% (London/Gatwick) to -23% (Nice), compared to 2019. (IGA Istanbul Airport was not yet operating during the period of interest in 2019)



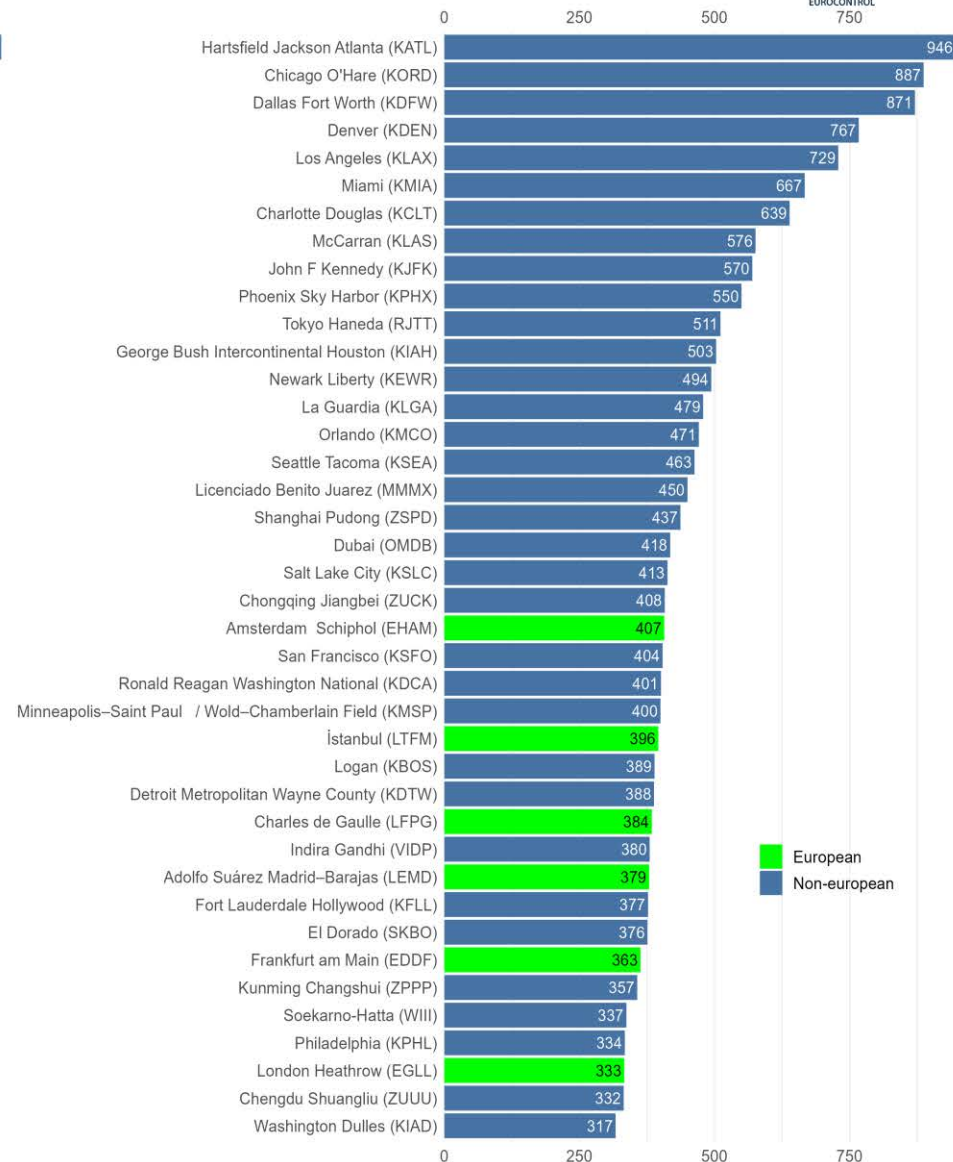
# Top 40 Global airports (Average Daily Departure flights for the last week)



7-day average on 2019-01-24



7-day average on 2022-01-24



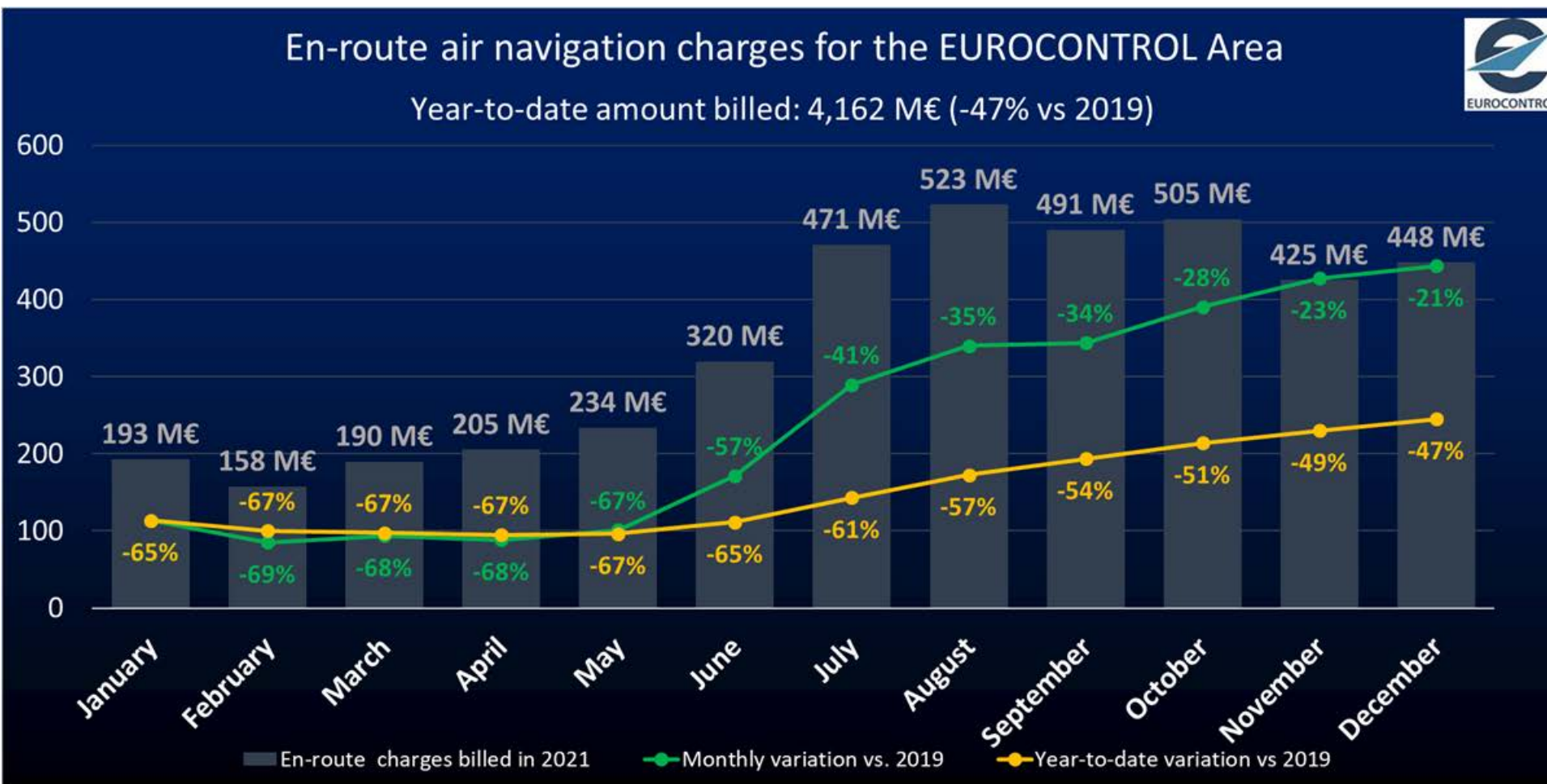
Comparing last week (right) with the same week in 2019 (left):

✘ Six European airports are now ranked in the second half of the top 40 global airports (five of them were in the first half in 2019).

✘ The top 10 global airports are currently all based in the US.

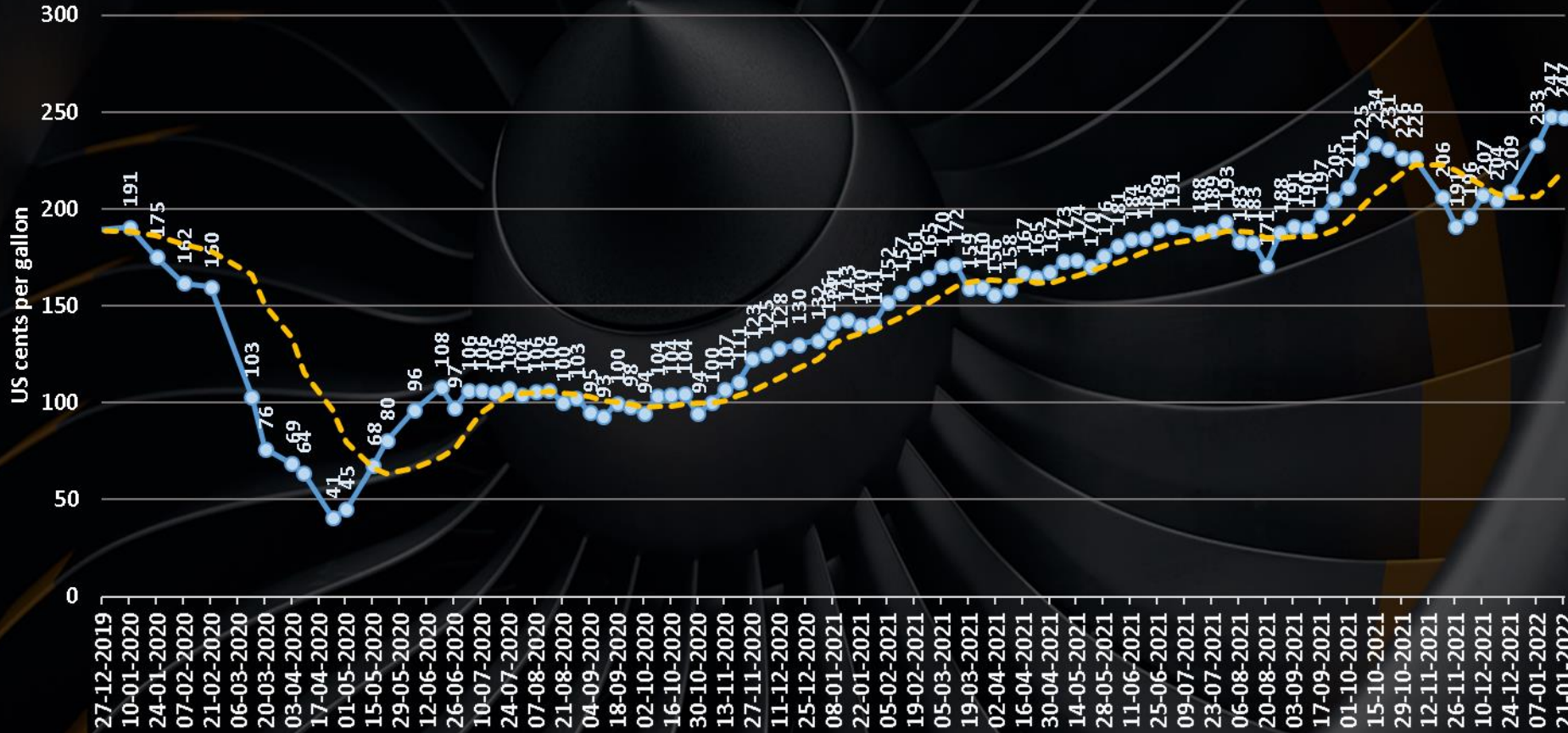
✘ The first Asian airport is currently Tokyo Haneda (11<sup>th</sup>); where it used to be Beijing (4<sup>th</sup> in 2019).

# En-Route Air Navigation charges



- ✘ **EUROCONTROL** has billed **448M€** of en-route charges for December flights.
- ✘ This is **-21%** below the amount billed for the December 2019 flights.
- ✘ On a year-to-date basis, EUROCONTROL billed **4,162M€** which is **-47%** vs 2019

## Jet Fuel Price Europe



Source: IATA/Platts

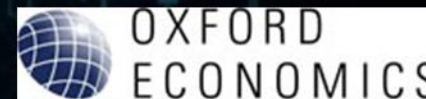
- ✖ Jet fuel average prices continued to surge to 247 cts/gal during the third week of January 2022.
- ✖ Jet fuel prices averaged 182 cts/gal in 2021, oscillating between 163 cts/gal in the first half and 201 cts/gal in the second half of last year.





## GDP in the European Union (EU27)

constant prices and exchange rate, Euro



- ✘ In 2021, **EU27 GDP** posted a **5.1%** growth on 2020.
- ✘ Due to intensified global supply bottlenecks and tighter pandemic-related restrictions, GDP growth for Q1 2022 is revised downward (-0.5pp compared to Nov21 forecast). Remaining quarters expected to grow slightly higher than previously forecasted.
- ✘ For 2022, **EU27 GDP** is likely to record a **3.9%** growth in the base scenario.

To further assist you in your analysis, EUROCONTROL provides the following additional information on a daily basis (daily updates at 7:00 CET for the first item and 12:00 CET for the second) and every Friday for the last item:

**1. EUROCONTROL Daily Traffic Variation dashboard:**

[www.eurocontrol.int/Economics/DailyTrafficVariation](http://www.eurocontrol.int/Economics/DailyTrafficVariation) (or via the COVID-19 button on the top of our homepage [www.eurocontrol.int](http://www.eurocontrol.int))

- This dashboard provides traffic for Day+1 for all European States; for the largest airports; for each Area Control Centre (ACC) and for the largest airline operators.



**2. COVID Related-NOTAMS with Network Impact (i.e. summary of airspace restrictions):**

<https://www.public.nm.eurocontrol.int/PUBPORTAL/gateway/spec/index.html>

- The Network Operations Portal (NOP) under “Latest News” is updated daily with a summary table of the most significant COVID-19 NOTAMs applicable at 12.00 UTC.



**3. NOP Recovery Plan.**

<https://www.public.nm.eurocontrol.int/PUBPORTAL/gateway/spec/index.html>

- This report, updated every Friday, is a special version of the Network operation Plan supporting aviation response to the COVID-19 Crisis. It is developed in cooperation with the operational stakeholders ensuring a rolling outlook.



For more information please contact [aviation.intelligence@eurocontrol.int](mailto:aviation.intelligence@eurocontrol.int)



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