

10 February 2022



EUROCONTROL

Comprehensive Assessment

EUROPEAN AVIATION



SUPPORTING EUROPEAN AVIATION



NETWORK
MANAGER



Headlines (Week of 3 – 9 Feb 2022)

- 17,719 daily flights on average over past week, 7% more than in the previous week; 68% of 2019 levels.
- Some States are easing pandemic-related measures, together with relaxation on travel restrictions, owing to high vaccination rates and supposedly less virulent omicron variant. Low-cost airlines (Ryanair, easyJet) have been increasing their capacities within the network (UK, Spain) over the last two weeks.
- Over past week, Ryanair was the busiest Aircraft Operator with 1,920 flights/day, followed by Turkish Airlines (1,003), easyJet (800), Lufthansa (720) and Air France (651).
- Domestic traffic vs 2019: Europe (-31%), USA (-13%), China (-36%), and Middle-East (-10%).
- Flights to/from Europe (intercontinental flows) are at -36% vs 2019.
- Jet fuel prices continued to surge, reaching 266 cts/gallon, an 8% increase in price over two weeks.
- Charter (+17%), All-cargo (+16%) and Business Aviation (+7%) are above 2019 levels. The two other segments are still below 2019 levels but Low-cost (-39% vs 2019) recently outpaced Traditional (-41%).



Traffic Situation

Average daily flights (including overflights)

On week 03 Feb - 09 Feb 2022

68%

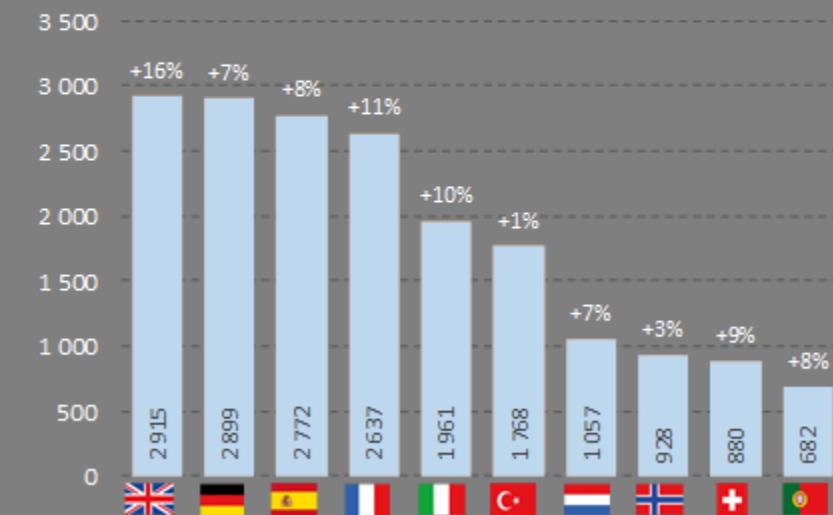
of equivalent week in 2019

Top 10 Aircraft Operators on Week 03 Feb - 09 Feb 2022 (avg daily flights)

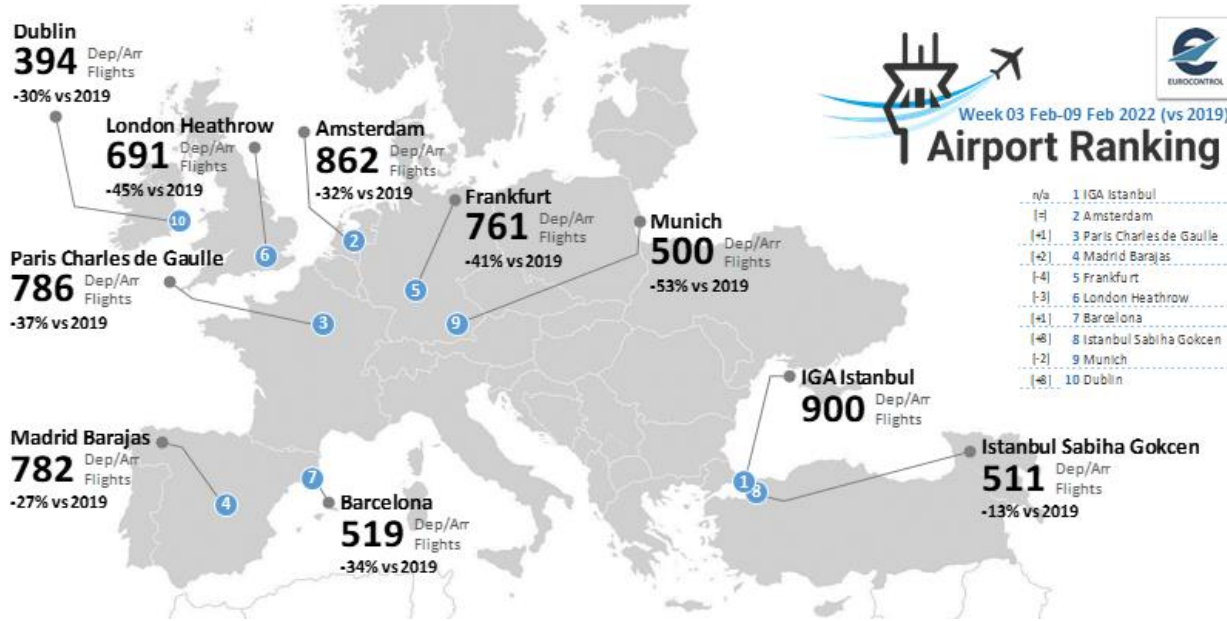


Top 10 Busiest States

on week 03 - 09 Feb 2022 (avg daily flights)
(Dep/Arr flights and comparison with previous week)

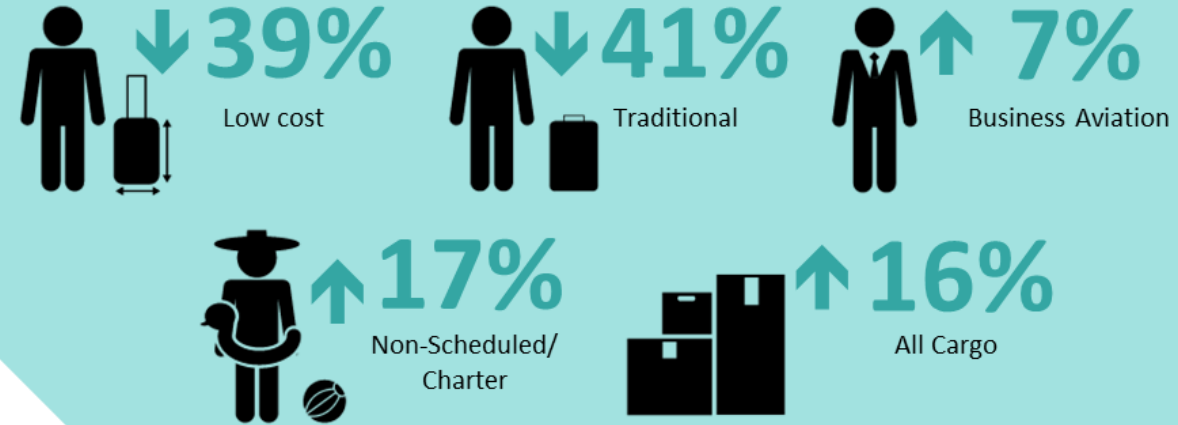


Top 10 Busiest Airports



Market Segments

on week 03 Feb – 09 Feb 2022 (vs 2019)



Traffic Flow

Average daily flight on week of 03 - 09 Feb 2022

	Flights	vs previous	vs 2019
Intra-European	13,838	+9%	-31%
Intercontinental	3,302	+0%	-36%

Economics

(4 February 2022)

Fuel price

↑ **266**
Cents/gallon

compared to
247 cents/gallon on 21 Jan 2022

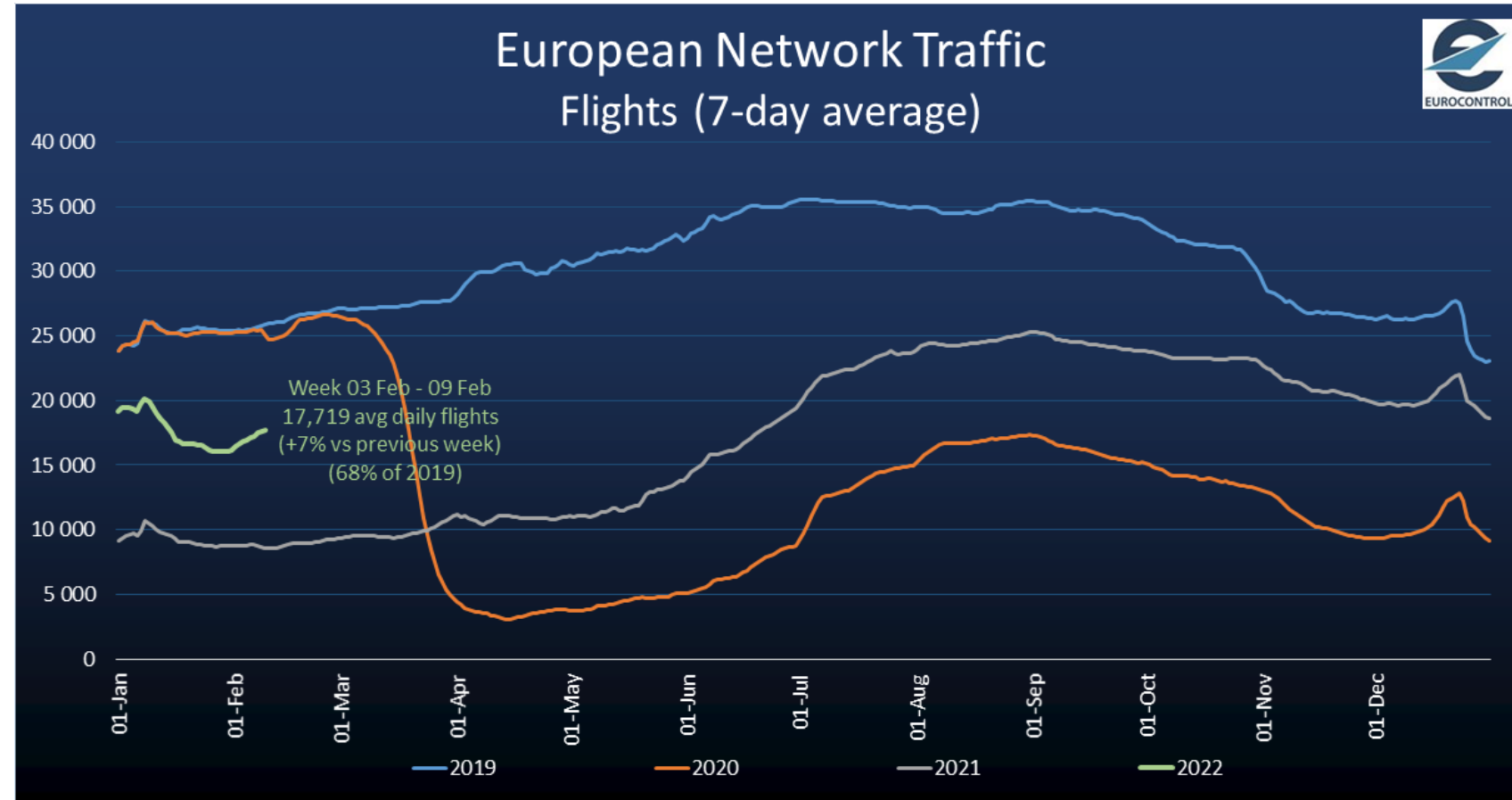
Source: IATA/Platts

Overall traffic situation at network level



On week 3 – 9 February:

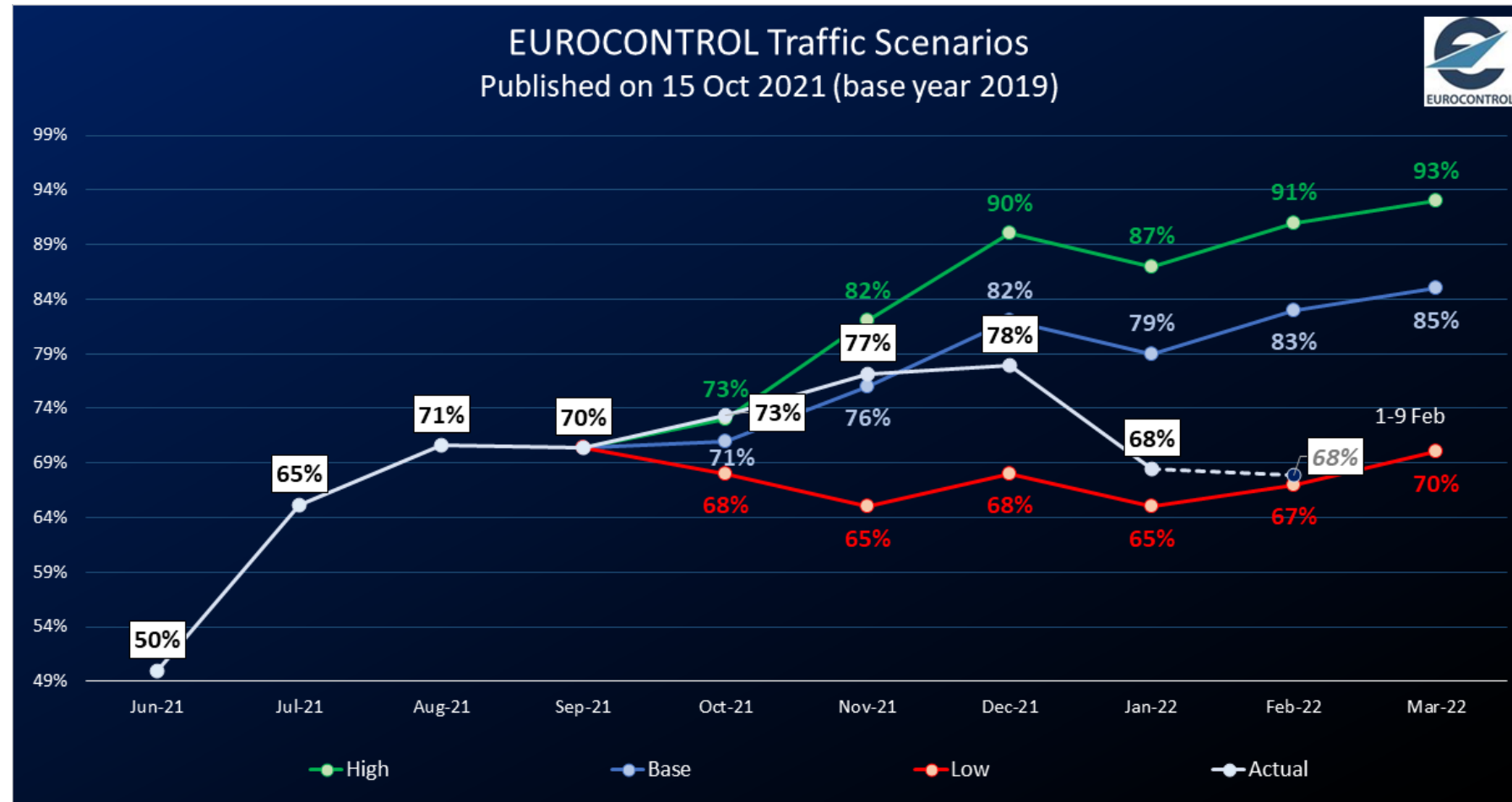
- ✈ **17,719** average daily flights.
- ✈ **+7%** vs previous week.
- ✈ **68%** of 2019 traffic levels.



Current situation compared to the latest EUROCONTROL traffic scenarios

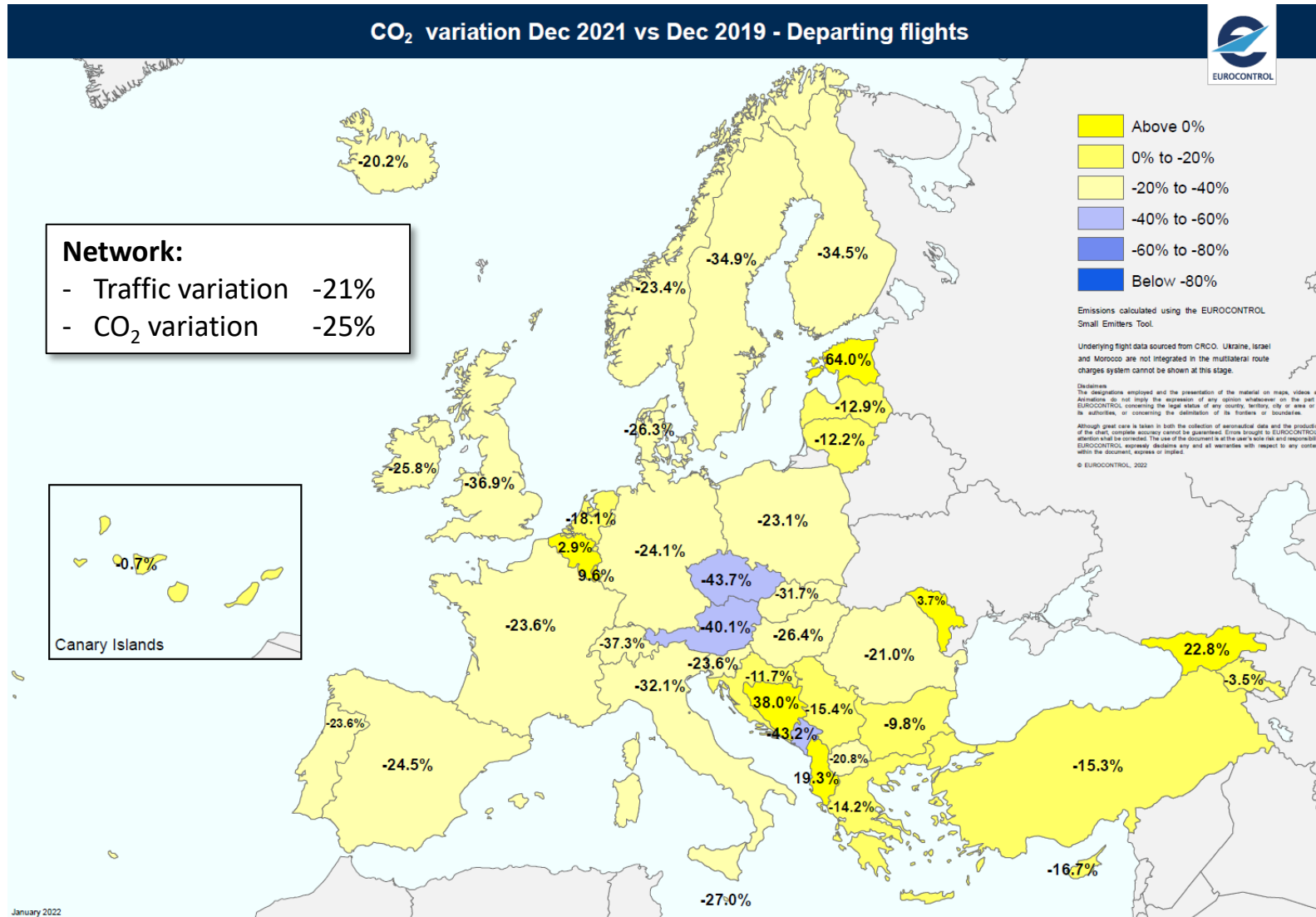


- ✘ In January 2022, **network traffic** was at **68%** compared to same period in 2019.
- ✘ For the first 9 days of **February**, network traffic is also at **68% of 2019** levels.
- ✘ Network traffic is in line with the low scenario of the EUROCONTROL traffic scenarios published on 15 October 2021.



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 (+16%)**, and **Charter (+17%)** and **Business Aviation (+7%)**.

✘ **Traditional** remained stable at **-41%** vs 2019 but **Low-Cost** has been catching up in the last two weeks to **-39%** vs 2019. Low-cost airlines added capacity to the network; States are relaxing travel restrictions after omicron spike.

Aircraft operators (Average daily flights for the last week)



Top 10

Top 10 Aircraft Operators	Week 03 - 09 Feb 2022		
	Average flights per day	% vs 2019	% over previous week
RYANAIR	1 920	+1%	35%
TURKISH AIRLINES	1 003	-20%	1%
easyJet	800	-46%	49%
Lufthansa	720	-50%	4%
AIRFRANCE	651	-41%	4%
KLM Royal Dutch Airlines	559	-22%	3%
BRITISH AIRWAYS	410	-53%	12%
WIZZ	355	-22%	-1%
PEGASUS	352	-19%	3%
Scandinavian Airlines	348	-56%	4%

✘ **Ryanair** is the busiest Aircraft Operator with 1,920 flights per day on average over last week, followed by **Turkish Airlines** (1,003), **easyJet** (800), **Lufthansa** (720), **Air France** (651) and **KLM** (559).

Within the top 10, all but one airline posted **increases** over the week before, highest being:

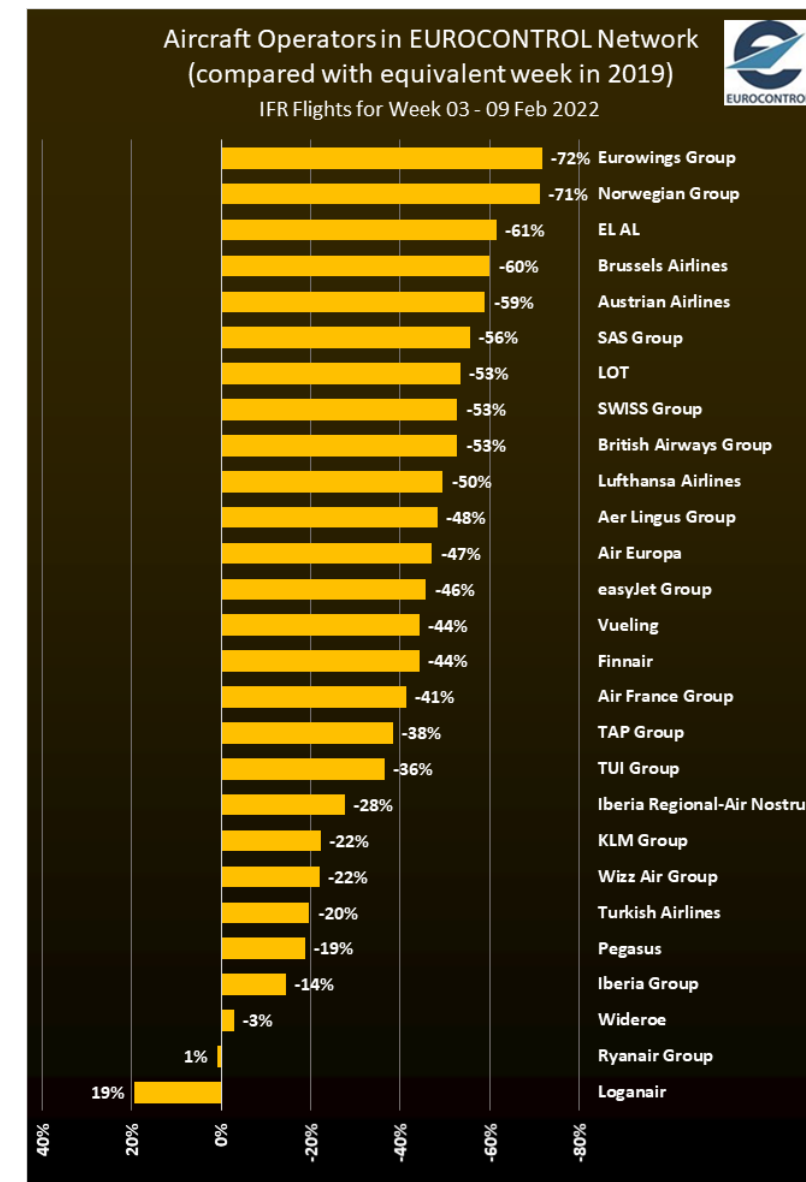
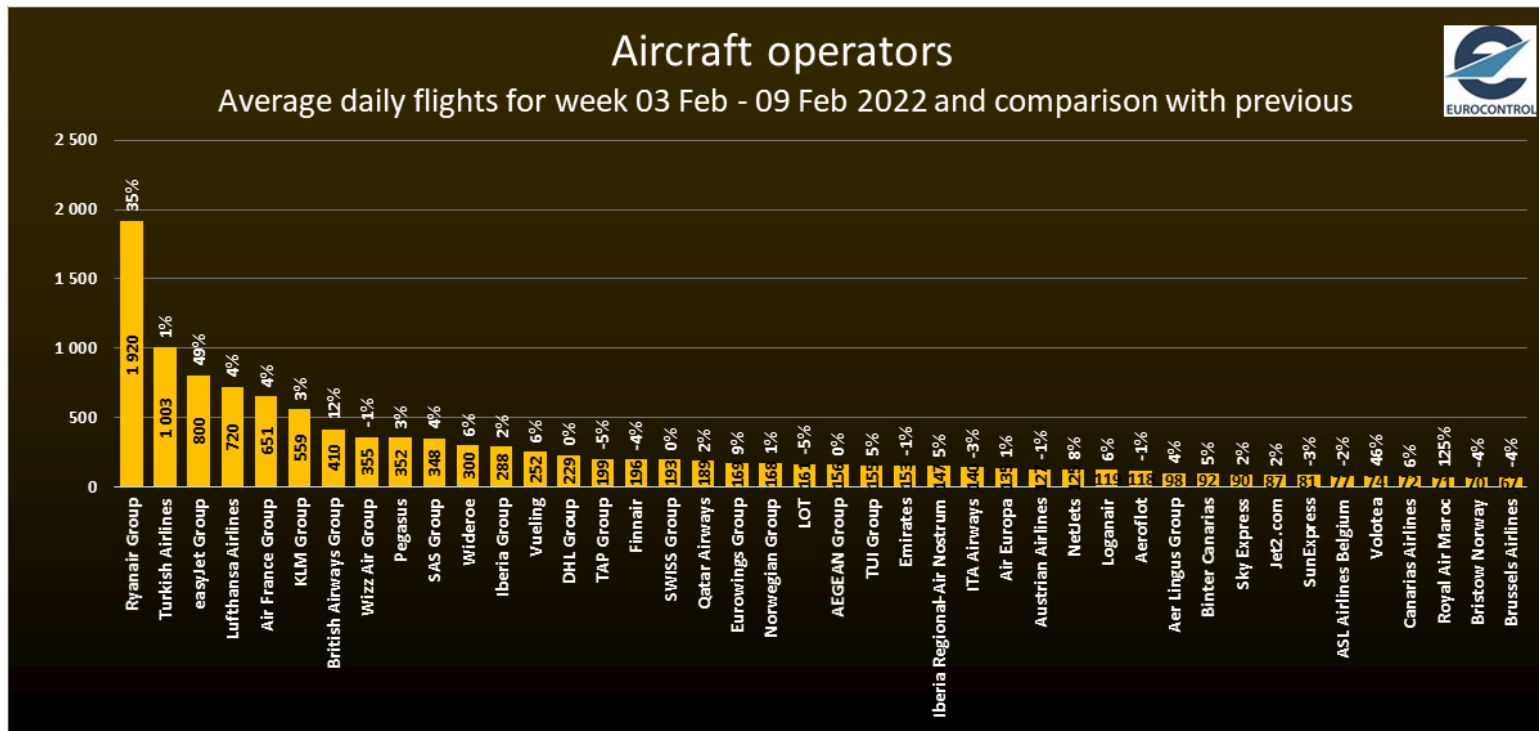
- ✘ **Ryanair** (+498 flights; +35%) with increases on Spain-UK flows, Ireland-UK flows and domestic flows in Italy.
- ✘ **easyJet** (+264 flights; +49%) due to increases on domestic flows in France, UK, France-UK, Netherlands-UK, Spain-UK.
- ✘ **British Airways** (+43 flights; +12%) mainly due to domestic flows in UK, Ireland-UK, Germany-UK and Spain-UK.

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

- ✘ **Wizz Air** (-2 flights; -1%).

Aircraft operators (Average daily flights for the last week)

Top 40



- ✦ Largest increases in flights for **Ryanair (+35%)**, **easyJet (+49%)**, **British Airways (+12%)**, **Royal Air Maroc (+125%)** and **Air France (+4%)**.
- ✦ Highest--though limited--decreases for operators **TAP (-5%)** and **LOT (-5%)**.
- ✦ Traffic levels ranging from **-72% (Eurowings)** to **+19% (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 3 - 9 February 2022



PERFORMANCE OF MAJOR LOW-COST CARRIERS

for the week 3 - 9 February 2022



PERFORMANCE OF MAJOR LONG-HAUL/LEGACY CARRIERS

for the week 3 - 9 February 2022



PERFORMANCE OF MAJOR REGIONAL CARRIERS*

for the week 3 - 9 February 2022













*REGIONAL AIRLINES USING SEPARATE IATA CODES

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



Top 10 States

on week 03 - 09 Feb 2022 (avg daily dep/arr)

1.  United Kingdom	2 915 flights ↓43% vs same week in 2019 ↑21% over 2 weeks
2.  Germany	2 899 flights ↓43% vs same week in 2019 ↑11% over 2 weeks
3.  Spain	2 772 flights ↓23% vs same week in 2019 ↑13% over 2 weeks
4.  France	2 637 flights ↓28% vs same week in 2019 ↑11% over 2 weeks
5.  Italy	1 961 flights ↓32% vs same week in 2019 ↑14% over 2 weeks
6.  Turkey	1 768 flights ↓19% vs same week in 2019 ↑20% over 2 weeks
7.  Netherlands	1 057 flights ↓29% vs same week in 2019 ↑7% over 2 weeks
8.  Norway	928 flights ↓30% vs same week in 2019 ↑2% over 2 weeks
9.  Switzerland	880 flights ↓32% vs same week in 2019 ↑9% over 2 weeks
10.  Portugal	682 flights ↓21% vs same week in 2019 ↑10% over 2 weeks

✘ **UK** is the State with the highest number of dep/arr flights on average over last week (2,915) followed by **Germany** (2,899), **Spain** (2,772), **France** (2,637) and **Italy** (1,961).

✘ Comparing with two weeks ago, the ranking of the top 3 has changed, with UK outpacing Germany and Spain.

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

Main increases over past week were observed in:

- ✘ **UK** (+407 flights; +16%) owing to Ryanair and easyJet mainly followed by British Airways, adding flights from/to/within UK.
- ✘ **France** (+265 flights; +11%) mainly due to easyJet, Ryanair and Volotea. Increases on domestic, as well as flows with UK and Morocco.
- ✘ **Spain** (+217 flights; +8%) owing to Ryanair, Vueling and easyJet mainly on domestic flows and flows with UK and Italy.
- ✘ **Germany** (+192 flights; +7%) mainly due to light AO, Ryanair and Lufthansa. Domestic flows, flows with UK and Spain.

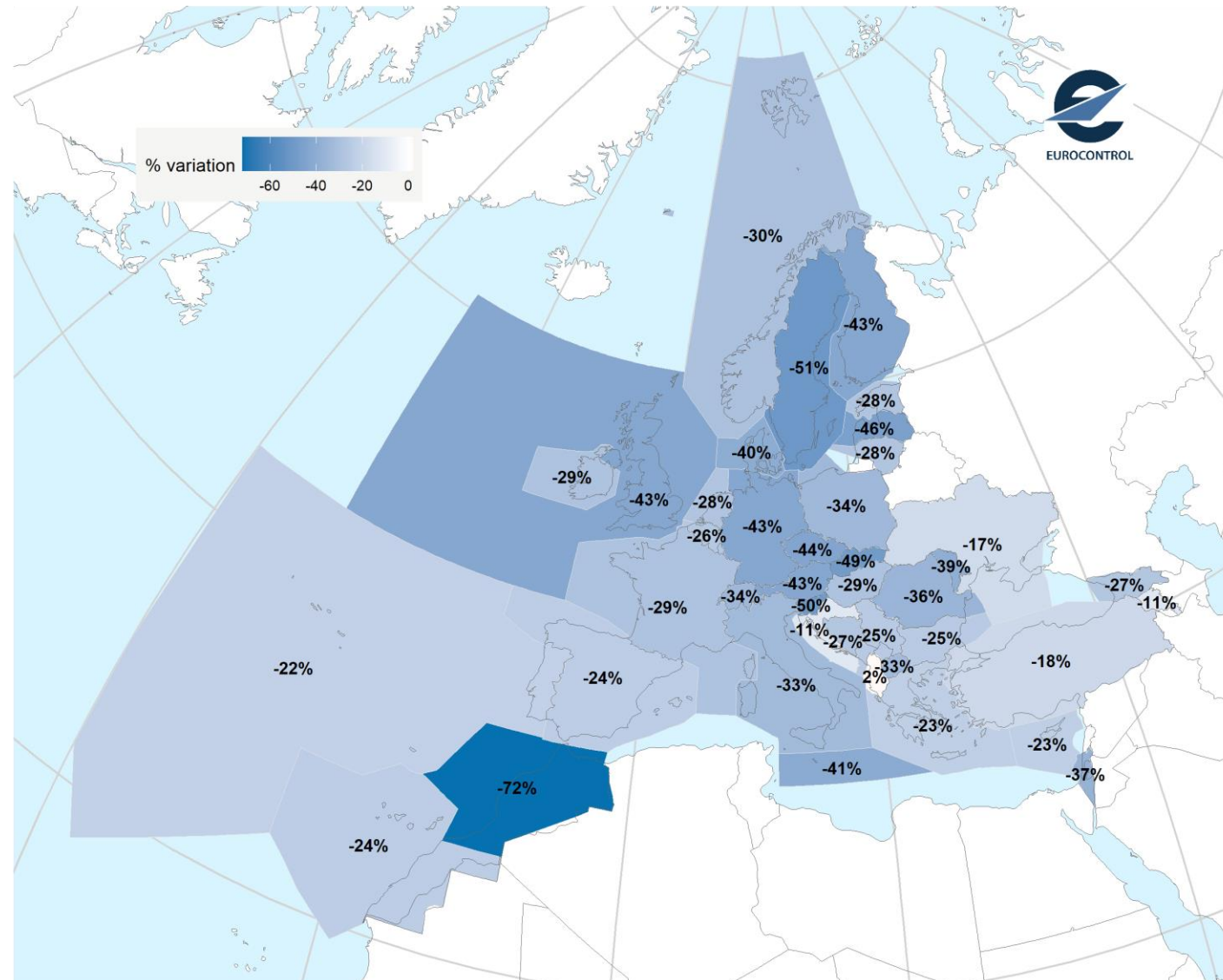
States (Average Daily Departure/Arrival flights for the last week)



Map

State FIR daily % arrivals/departures variation vs 2019 on 2022-02-08

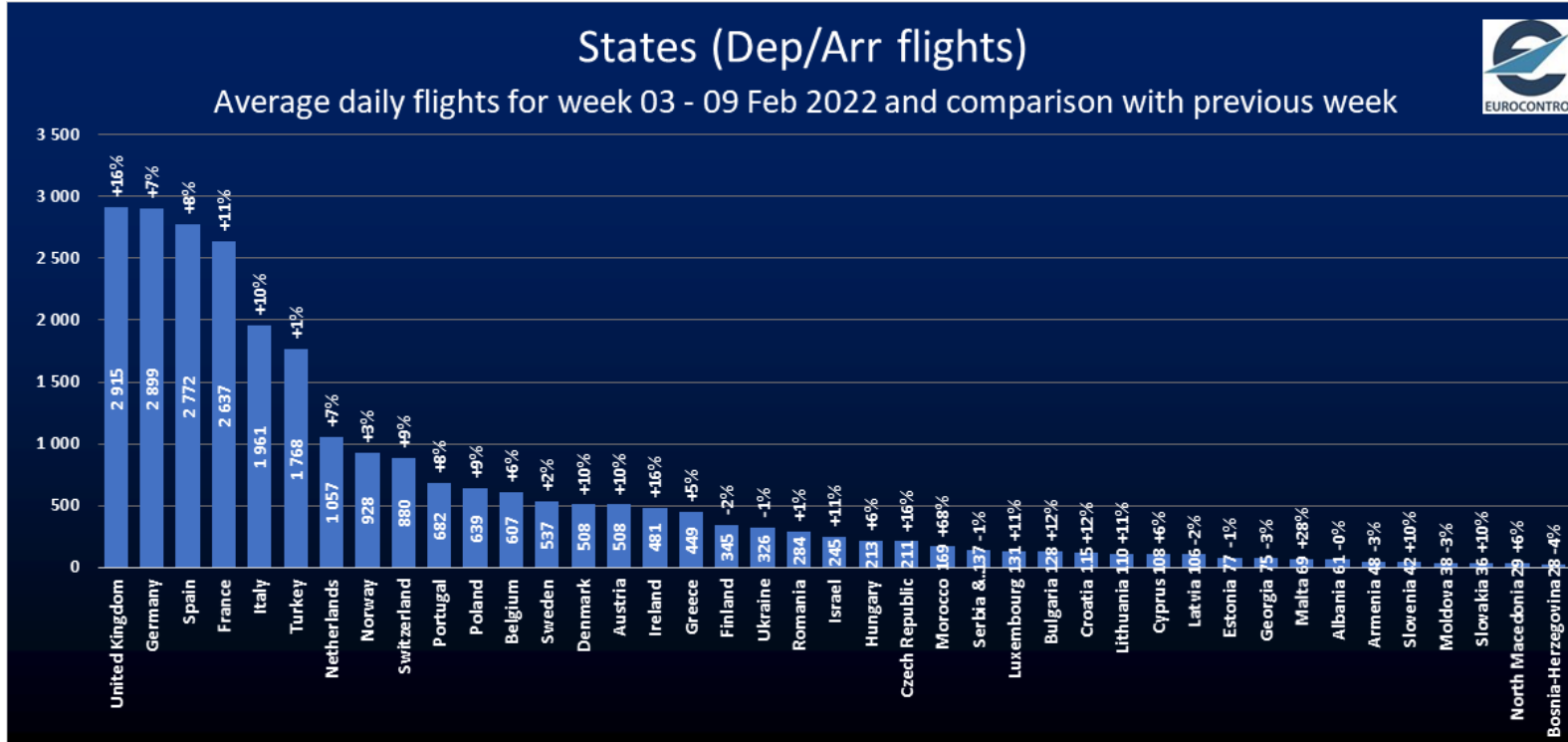
7-day average - FIRs at altitude FL200



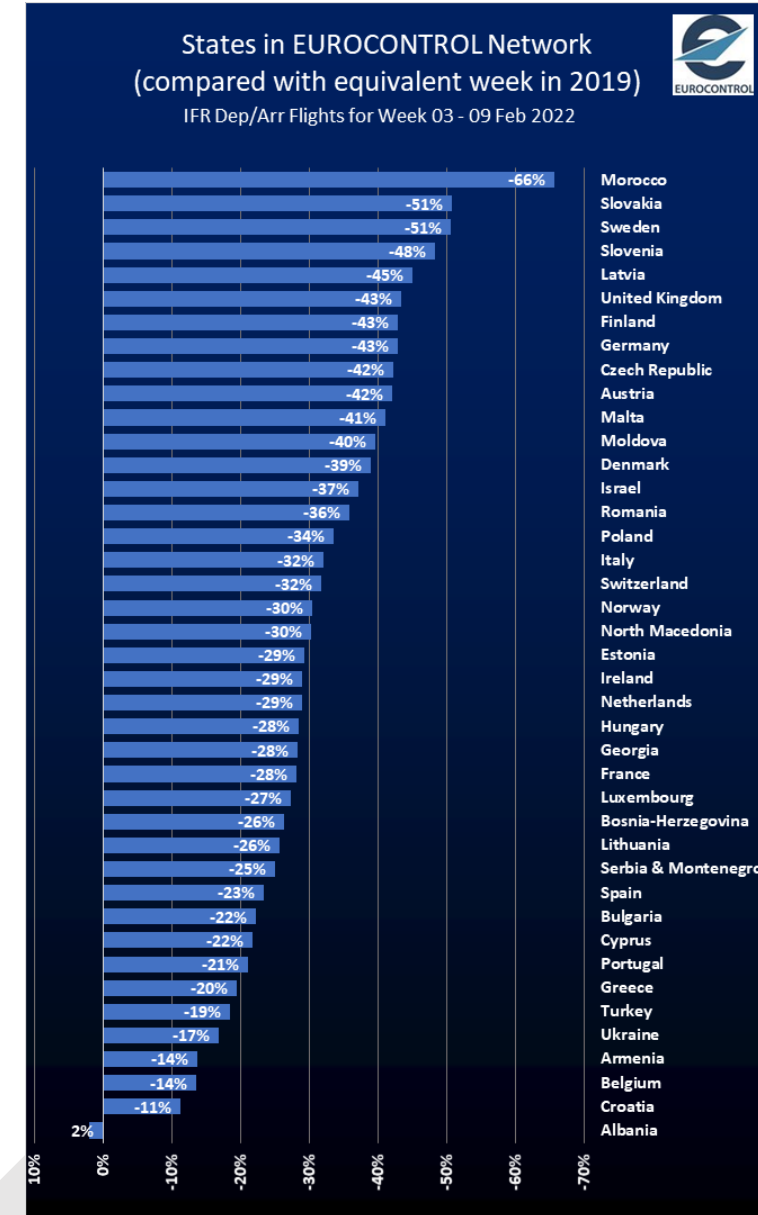
The designations employed and the presentation of the material on maps, videos and animations do not imply the expression of any opinion whatsoever on the part of EUROCONTROL concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries

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 03 - 09 Feb 2022



- ✘ Highest increases in flights for **UK** (+16% over previous week) followed by **France** (+11%), **Spain** (+8%), **Germany** (+7%) and **Italy** (+10%)
- ✘ Highest (limited) decrease for **Finland** (-2%), **Ukraine** (-1%) and **Georgia** (-3%).
- ✘ Traffic levels ranging from -66% (**Morocco**) to 2% (**Albania**), compared to 2019.

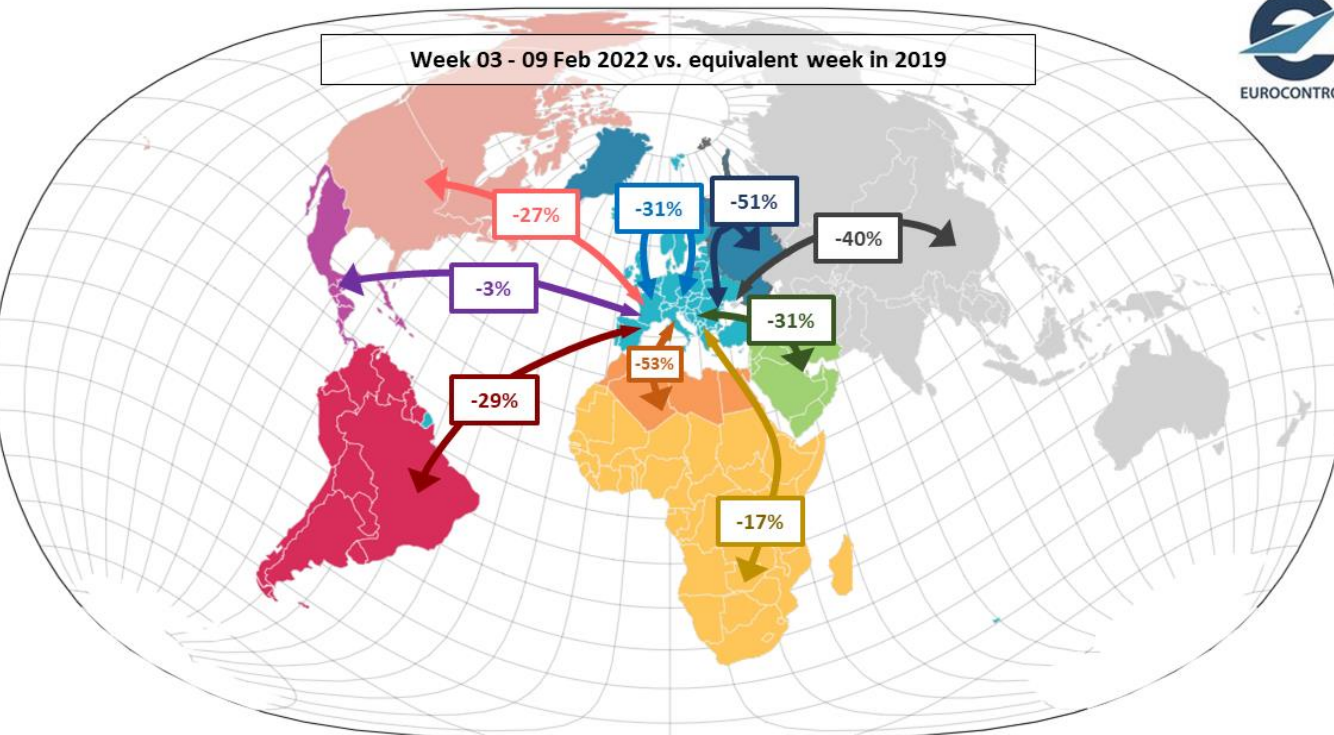
Traffic flows (Average Daily Departure/Arrival flights for the last week)



- ✂ The main traffic flow is the intra-Europe flow with 12,746 flights on average the most recent week, which is increasing (+9%) over previous week.
- ✂ Intra-Europe flights are at -31% compared to 2019 while intercontinental flows are at -36%.
- ✂ Flows between Europe and North-Africa increased by 20% as Morocco lifted travelers' flight ban since 7 February 2022.

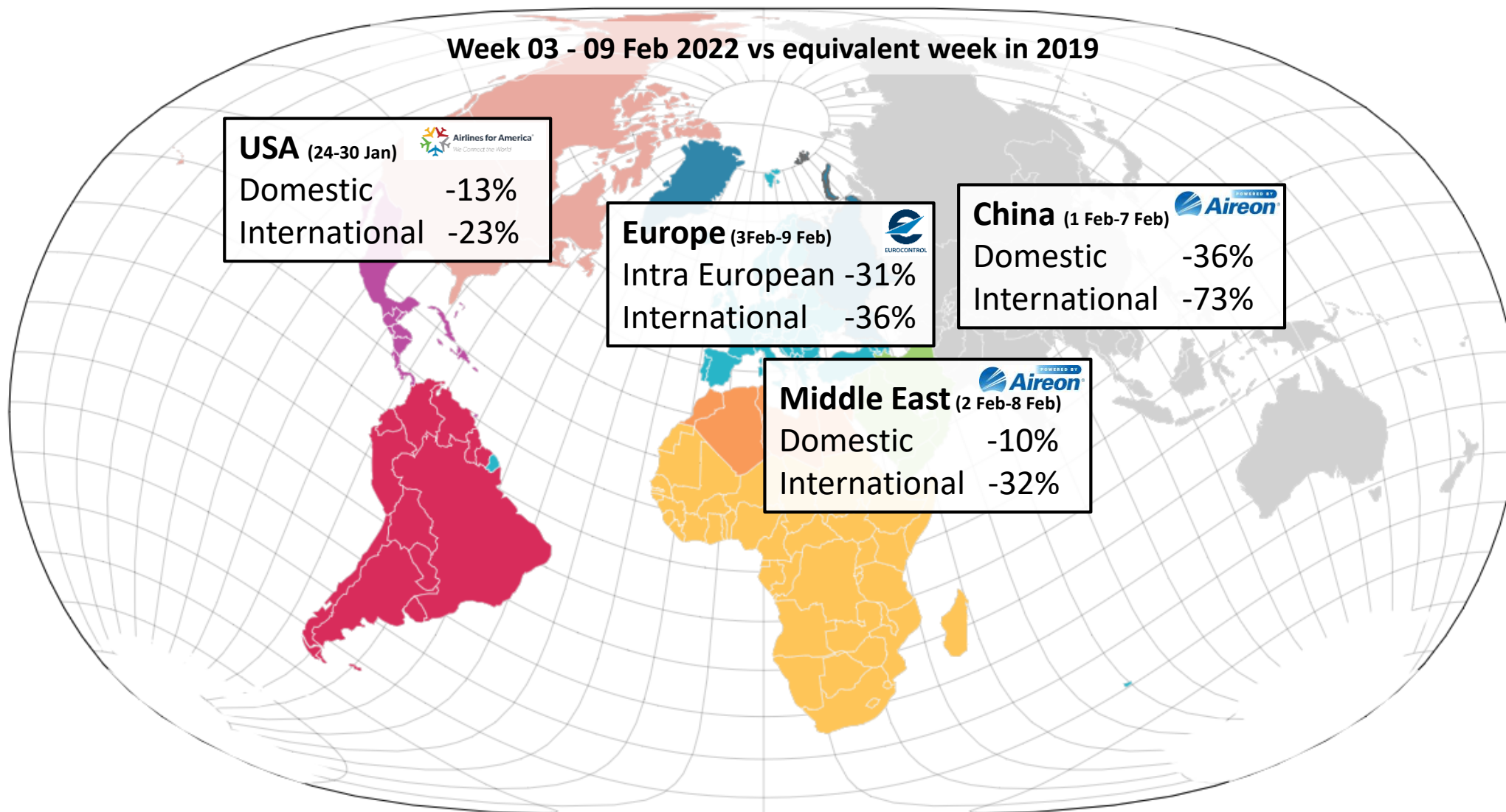


Week 03 - 09 Feb 2022 vs. equivalent week in 2019



REGION (Average daily flights)	Week 27/01/2022 - 02/02/2022	Week 03/02/2022 - 09/02/2022	%	vs. 2019
Intra-Europe	12 746	13 838	+9%	-31%
Europe<->Asia/Pacific	489	434	-11%	-40%
Europe<->Mid-Atlantic	188	186	-1%	-3%
Europe<->Middle-East	860	872	+1%	-31%
Europe<->North Atlantic	629	651	+3%	-27%
Europe<->North-Africa	341	411	+20%	-53%
Europe<->Other Europe	395	358	-9%	-51%
Europe<->South-Atlantic	125	124	-1%	-29%
Europe<->Southern Africa	260	267	+3%	-17%
Non Intra-Europe	3 287	3 302	+0%	-36%

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 03 - 09 Feb 2022				
	Airport-Pair	Avg daily flights	Δ vs prev. week	% vs prev. week	% vs 2019
→	London/Heathrow <-> New York JFK	24	↗ +3	+14%	↘ -35%
→	London/Heathrow <-> Dubai	16	→ +0	+2%	↘ -19%
→	Paris/Charles-De-Gaulle <-> Dubai	12	→ +0	+1%	↗ +15%
↗	Paris/Charles-De-Gaulle <-> New York JFK	11	↗ +2	+17%	↘ -16%
↗	London/Heathrow <-> Hamad INTL	11	→ +1	+10%	↘ -26%
↘	Frankfurt <-> Seoul/Inchon INTL	10	↘ -1	-10%	↗ +26%
↗	Madrid/Barajas <-> Bogota Intl/Eldorado	10	→ +1	+11%	↘ -3%
↘	London/Heathrow <-> Los Angeles	9	→ +0	+0%	↘ -45%
↗	Paris/Orly <-> Pointe-A-Pitre/Le Ra	9	→ +1	+7%	↘ -24%
↘	Amsterdam <-> Dubai	9	→ -0	-2%	↗ +3%
↗	Milan/Malpensa <-> New York JFK	9	↗ +1	+15%	↗ +11%
↘	London/Heathrow <-> Delhi	9	↘ -1	-14%	↘ -29%
↗	Paris/Orly <-> Fort-De-France Le La	8	↗ +1	+16%	↘ -25%
↗	London/Heathrow <-> Chicago O Hare Intl	8	→ +1	+8%	↘ -33%
↘	Frankfurt <-> Shanghai Pudong Intl	8	→ -1	-7%	↘ -11%
↘	London/Heathrow <-> Miami Intl/Florida	8	→ +0	+0%	↘ -33%
↗	Amsterdam <-> Atlanta Intl/Hartsfi	8	↗ +1	+18%	↘ -2%
↗	Amsterdam <-> Shanghai Pudong Intl	8	→ +0	+4%	↗ +13%
↘	Madrid/Barajas <-> Mexico City	7	→ -0	-4%	↗ +11%
↘	Frankfurt <-> Dubai	7	→ -0	-2%	↘ -9%

Within the top 20, long-haul airport pairs, over last week:
Highest increases compared to the week before for:

- ✘ London Heathrow – New York JFK (+14%)
- ✘ Paris CDG – New York JFK (+17%)
- ✘ Milan – New York JFK (+15%)
- ✘ Paris Orly – Fort de France (+16%)

Highest decreases compared to the week before for:

- ✘ London Heathrow – Delhi (-14%)
- ✘ Frankfurt – Seoul (-10%)
- ✘ Frankfurt – Shanghai (-7%)
- ✘ Madrid - Mexico (-4%)

Country pairs (Average Daily flights for the last week)

Top 10



Rank evolution over prev. week	Top 10 Country-Pair on week 03 - 09 Feb 2022				
	Country-Pair	Avg daily flights	Δ vs prev. week	% vs prev. week	% vs 2019
→	Spain <-> Spain	896	↗ +51	+6%	↘ -17%
→	France <-> France	854	↗ +74	+9%	↘ -16%
→	Turkey <-> Turkey	694	↗ +12	+2%	↘ -26%
→	Norway <-> Norway	617	↗ +11	+2%	↘ -21%
↗	United Kingdom <-> United Kingdom	603	↗ +42	+8%	↘ -38%
↘	Italy <-> Italy	589	↗ +25	+4%	↘ -19%
→	Germany <-> Germany	501	↗ +68	+16%	↘ -48%
→	Spain <-> United Kingdom	331	↗ +69	+26%	↘ -34%
→	Germany <-> Spain	267	↗ +22	+9%	↘ -32%
→	Greece <-> Greece	220	↗ +9	+4%	↘ -8%

Within the top 10, all flows posted an increase over previous week for:

- ✘ **France-France** (+74 flights; +9%) owing to easyJet, light AO and Volotea.
- ✘ **Spain-UK** (+69 flights; +26%) owing to Ryanair, easyJet and British Airways.
- ✘ **Germany-Germany** (+68 flights; +16%) mainly due to light AO and Lufthansa .
- ✘ **Spain-Spain** (+51 flights; +6%) mainly due to Ryanair, Vueling and Air Nostrum.
- ✘ **UK-UK** (+42 flights; +8%) mainly due to easyJet, Loganair and British Airways Shuttle

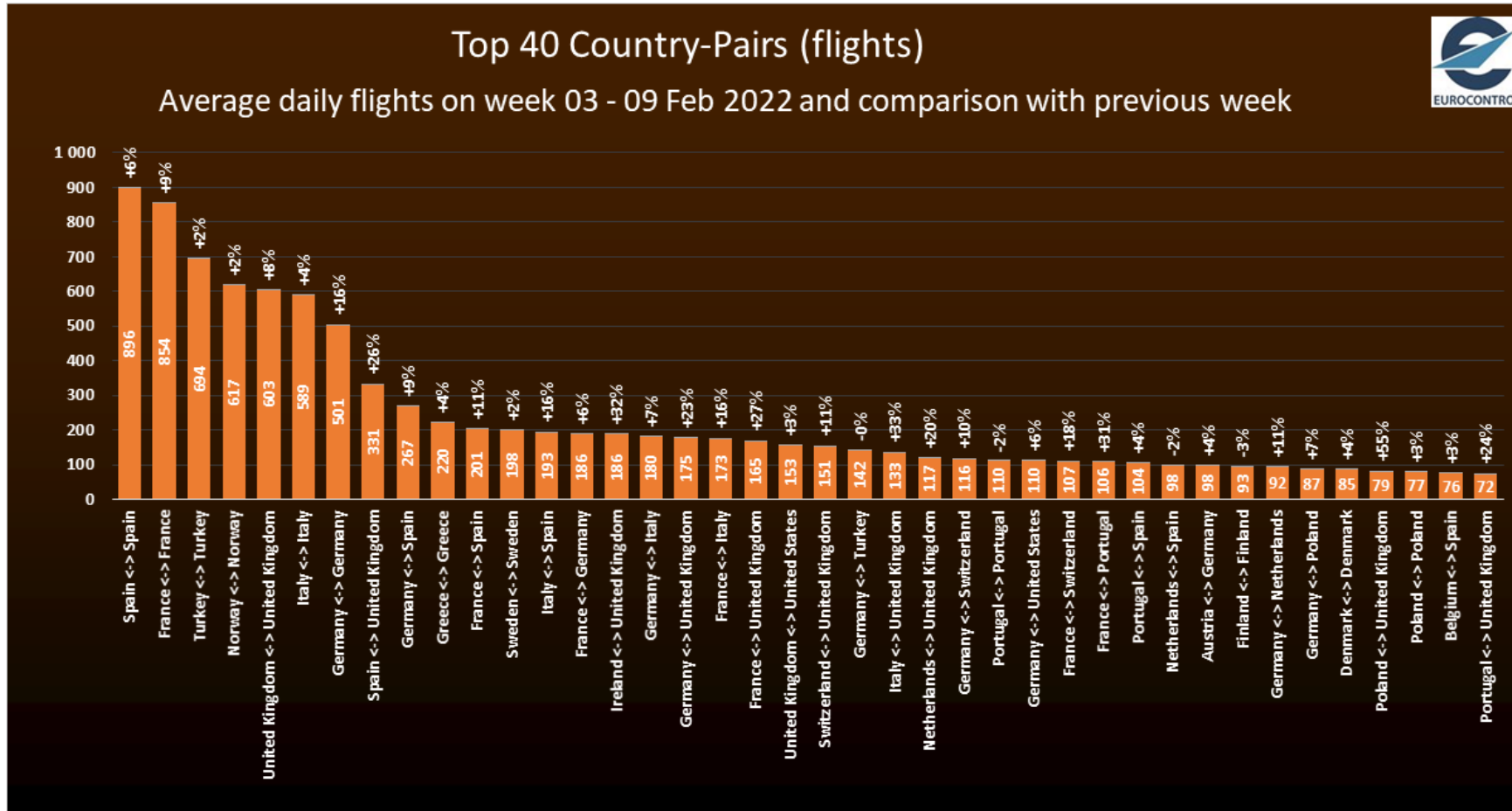
✘ 7 of the top 10 flows are domestic.

✘ **Spain-Spain** is the country-pair with the highest number of dep/arr flights (896) followed by **France-France** (854), **Turkey-Turkey** (694), **Norway-Norway** (617), **UK-UK** (603), **Italy-Italy** (589), **Germany-Germany** (501).

✘ Over the previous, domestic flows in UK increased their ranking whereas, domestic flows in Sweden and in Italy decreased their ranking.

Country pairs (Average Daily flights for the last week)

Top 40



- ✦ Highest increase in flights for **France-France** (+9% over previous week), followed by **Spain-UK** (+26%), **Germany-Germany** (+16%) and **Spain-Spain** (+6%).
- ✦ Limited decreases for **Portugal-Portugal** (-2%), **Finland-Finland** (-3%) and **Netherlands-Spain** (-2%).

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



Top 10

Rank evolution over prev. Week	Top 10 Airports on week 03 Feb - 09 Feb 2022				
	Airport	Average Daily Dep/Arr Flights	Δ over prev. week	% over prev. week	% vs 2019
→	IGA Istanbul Airport	900	↗ +16	+2%	Not appl.
→	Amsterdam	862	↗ +58	+7%	↘ -32%
↗	Paris/Charles-De-Gaulle	786	↗ +37	+5%	↘ -37%
↘	Madrid/Barajas	782	↗ +20	+3%	↘ -27%
↘	Frankfurt	761	↗ +6	+1%	↘ -41%
→	London/Heathrow	691	↗ +30	+5%	↘ -45%
↗	Barcelona	519	↗ +57	+12%	↘ -34%
↘	Istanbul/Sabiha Gokcen	511	↗ +15	+3%	↘ -13%
↘	Munich	500	↗ +6	+1%	↘ -53%
↗	Dublin	394	↗ +61	+18%	↘ -30%

✘ **Istanbul IGA** is the airport with the highest number of dep/arr flights (900) followed by **Amsterdam** (862), **Paris/CDG** (786), **Madrid/Barajas** (782) and **Frankfurt** (761).

✘ **Dublin** airports entered the top 10 compared to previous week due to the strong increase of Ryanair capacities on flows with UK.

Within the top 10, all airports recorded **increases** over previous weeks, most important one are:

- ✘ **Dublin** (+61 flights; +18%) due to increases by Ryanair and Aer Lingus on flows with UK and Spain .
- ✘ **Amsterdam** (+58 flights; +7%) owing to easyJet and KLM on flows with UK, Germany and Italy.
- ✘ **Barcelona** (+57 flights; +12%) mainly due to Ryanair, Vueling and easyJet on domestic flows and flows with Italy, UK, France and Germany.

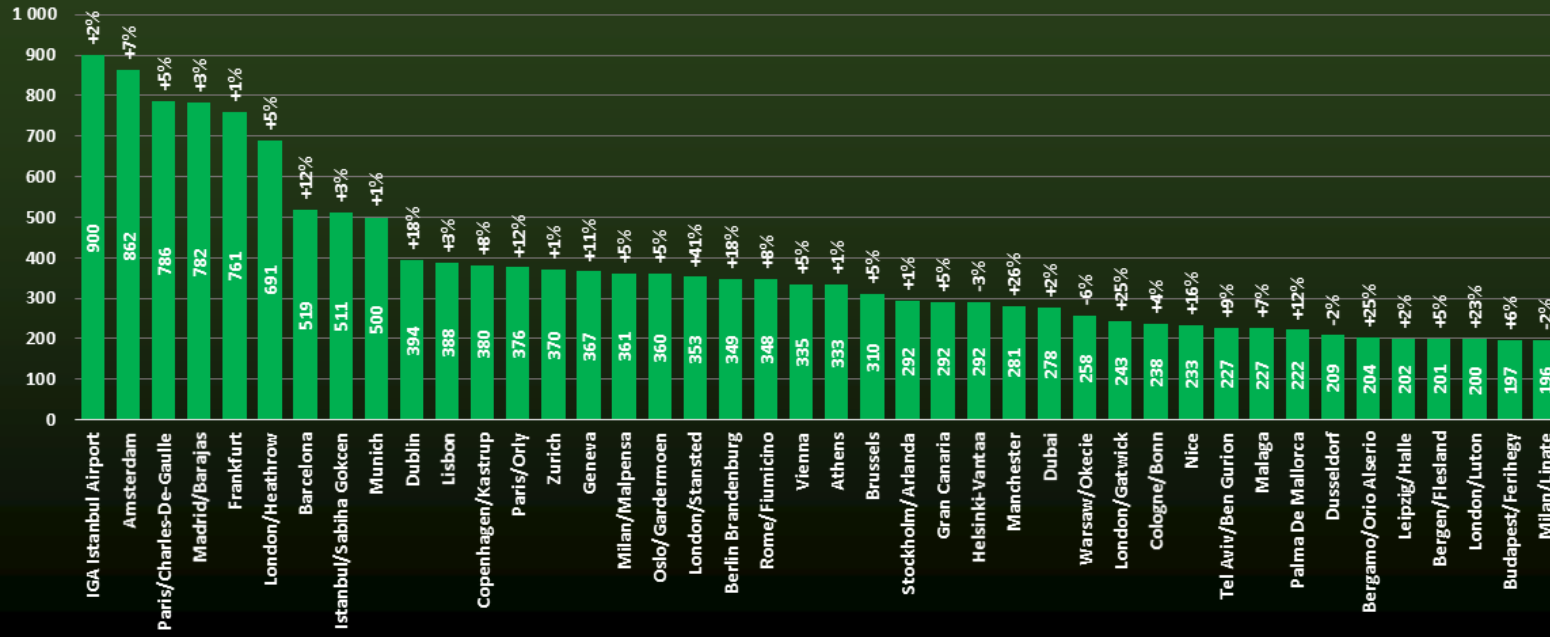
Airports (Average Daily Departure/Arrival flights for the last week)

Top 40



Top 40 Airports (Dep/Arr flights)

Average daily flights for week 03 Feb - 09 Feb 2022 and comparison with previous week

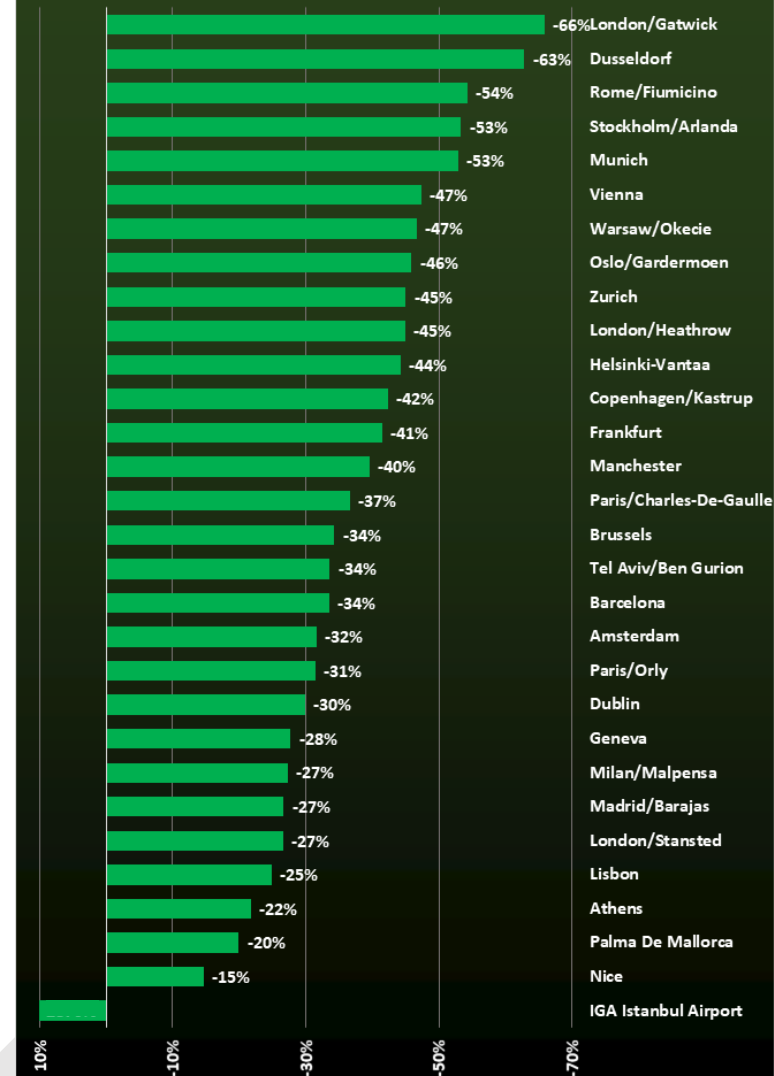


- ✘ Highest increases in flights for **London Stansted (+41%)**, **Dublin (+18%)** and **Amsterdam (+7%)**.
- ✘ Highest decreases for **Warsaw (-6%)**, **Moscow/Vukovo (-9%)** and **Helsinki (-3%)**.
- ✘ Traffic levels ranging from -66% (London/Gatwick) to -15% (Nice), compared to 2019. (IGA Istanbul Airport was not yet operating during the period of interest in 2019)

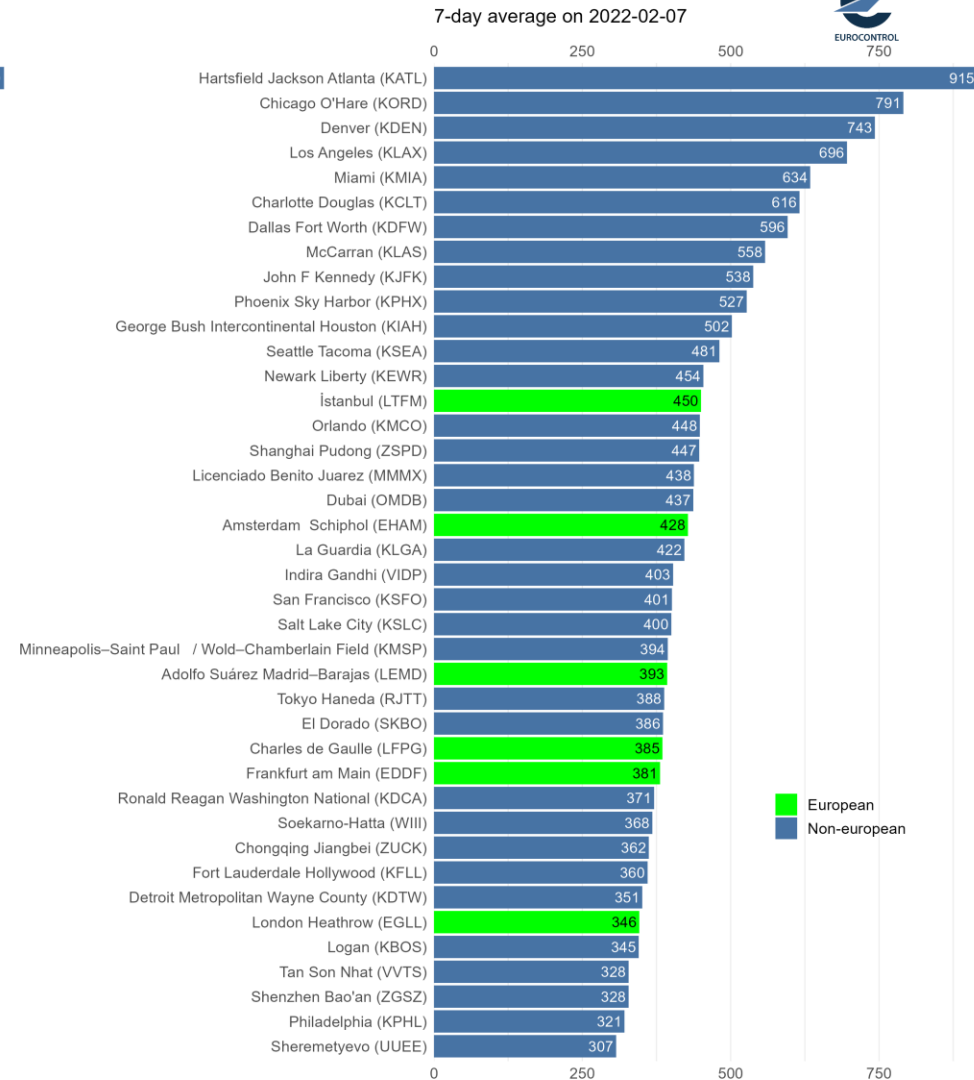
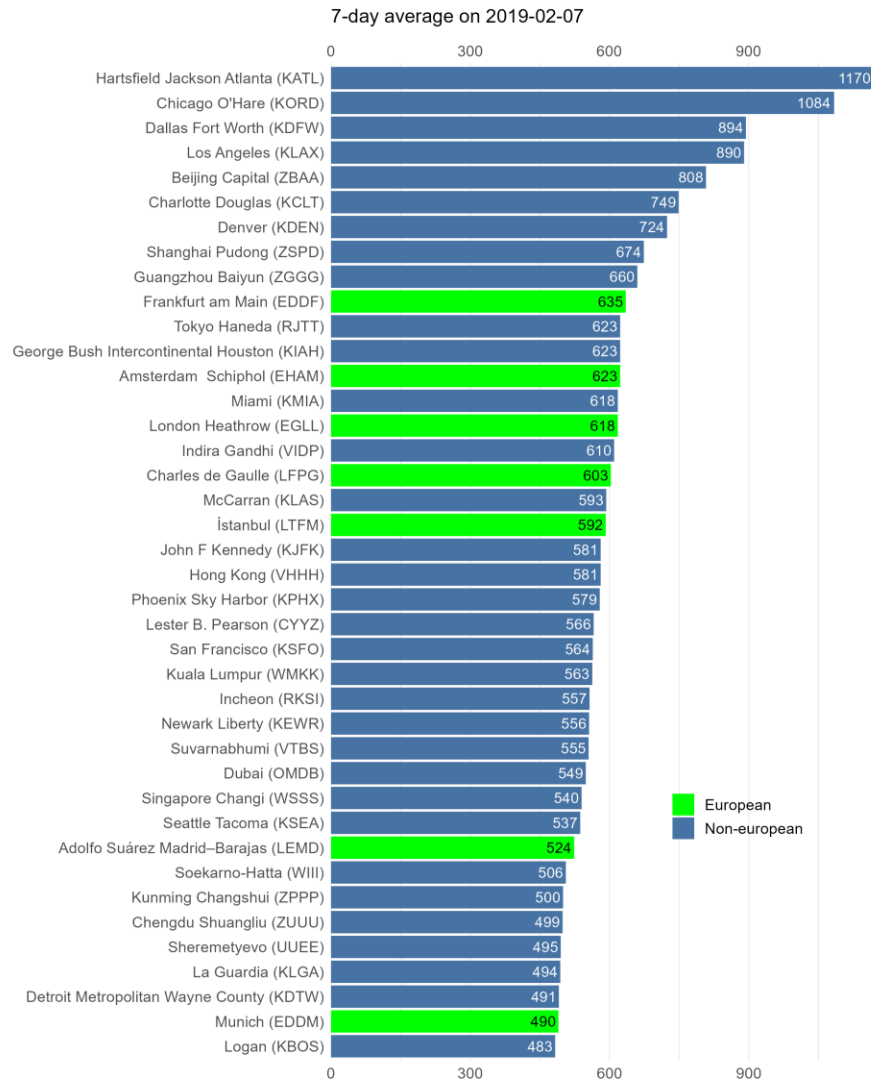
Airports in EUROCONTROL Network (compared with equivalent week in 2019)



IFR Dep/Arr Flights for Week 03 - 09 Feb 2022



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



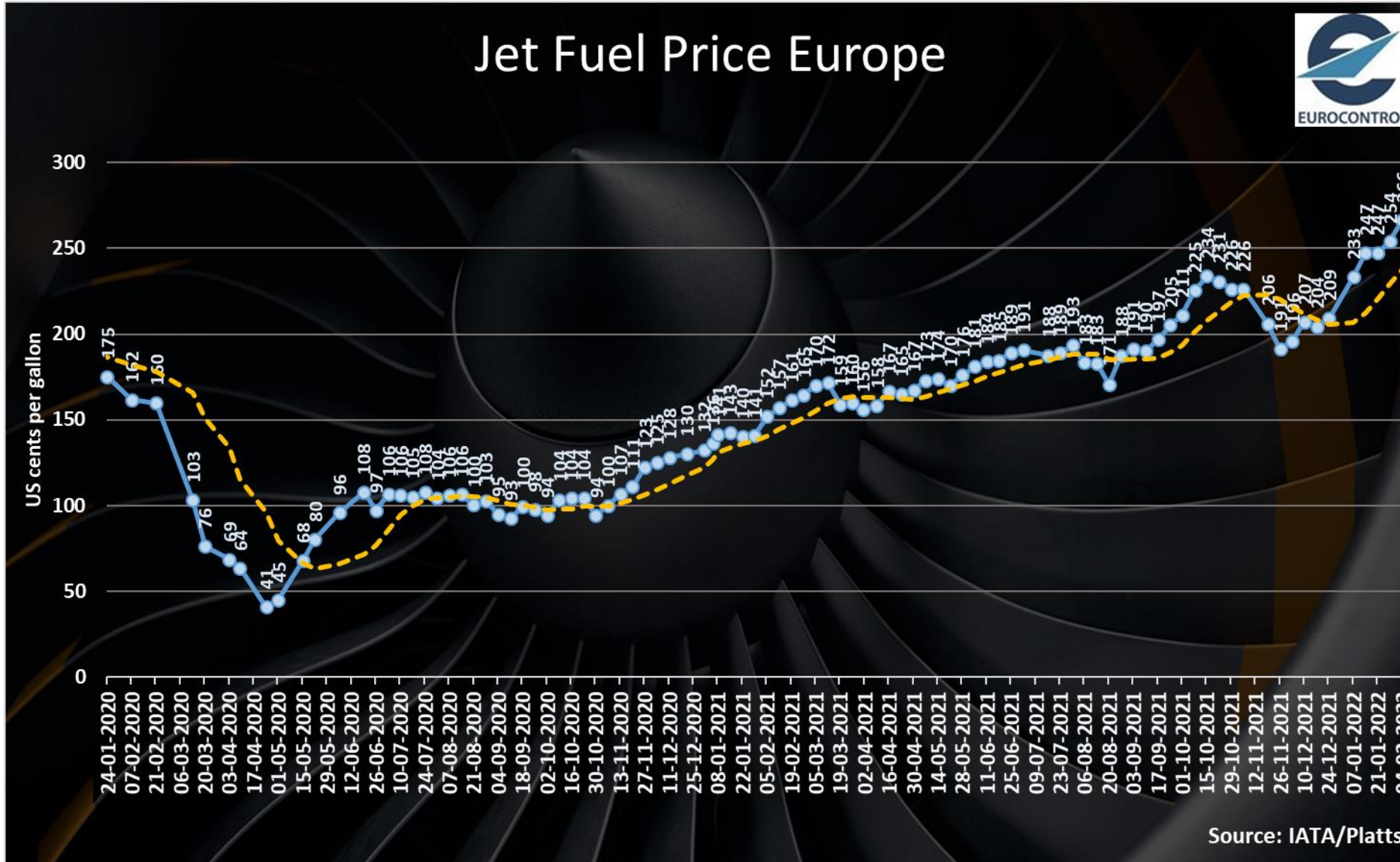
Source: Flightradar24 Historical Global Utilisation data

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

✘ Six European airports are ranked in the top 40 global airports, with two: Istanbul IGA and Amsterdam in the first half (five of them were in the first half in 2019).

✘ The top 14 global airports are currently all based in the US.

✘ The first Asian airport is currently Shanghai (16th); where it used to be Beijing (5th in 2019).



✳ Jet fuel prices have reached their highest since September 2014 and averaged 266 cts/gal in early February.

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 (or via the COVID-19 button on the top of our homepage 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



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