

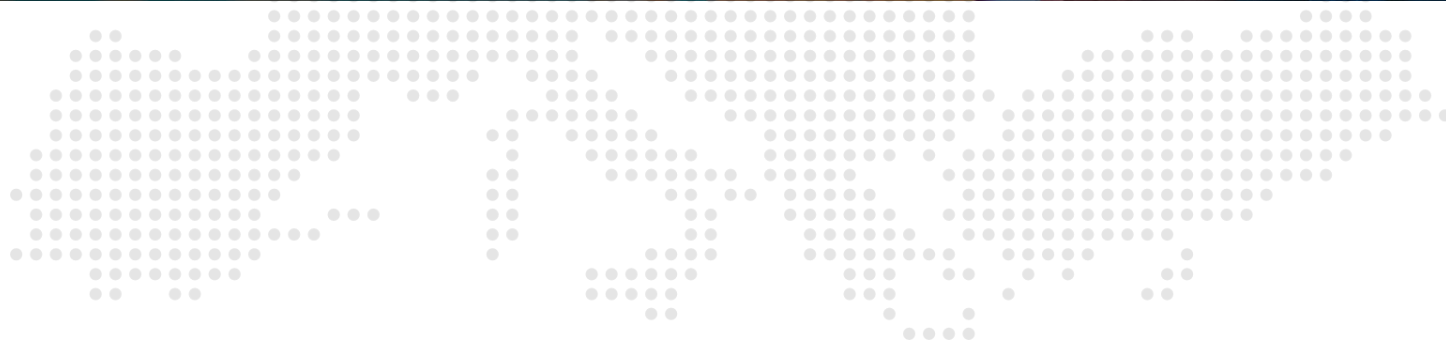
3 March 2022



# EUROCONTROL

Comprehensive Assessment

# EUROPEAN AVIATION



SUPPORTING EUROPEAN AVIATION



NETWORK  
MANAGER



# Headlines (Week of 24 Feb – 2 Mar 2022)

- **19,938 daily flights** on average over past week, **increasing by 4% vs previous week**; 74% of 2019 levels.
- Dramatic developments in Russia and Ukraine due to military activities, leading to the closure of **Ukrainian airspace on Thu 24 Feb** and **ban of Russian airlines in Europe and European airlines in Russia**.
- **No traffic in Ukraine** and **almost no traffic in Moldova**.
- Low-cost airlines (Ryanair, easyJet) have been adding capacity to the network. States are relaxing travel restrictions after omicron spike.
- Over past week, Ryanair was the busiest Aircraft Operator with 1,959 flights per day on average, followed by easyJet (1,118), Turkish Airlines (1,001), Air France (830), Lufthansa (797) and KLM (634).
- Domestic traffic vs 2019: Europe (-25%), USA (-11%), China (-21%) and Middle-East (-5%).
- **Jet fuel prices jumped to 297 cts/gallon** on 1 March, due to the Russian crisis (+13% over 4 days).
- Sharp increase of Business Aviation reaching +20% vs 2019. Charter (+21%), All-cargo (+4%).



## Traffic Situation

Average daily flights (including overflights)

On week 24 Feb - 02 Mar 2022

# 74%

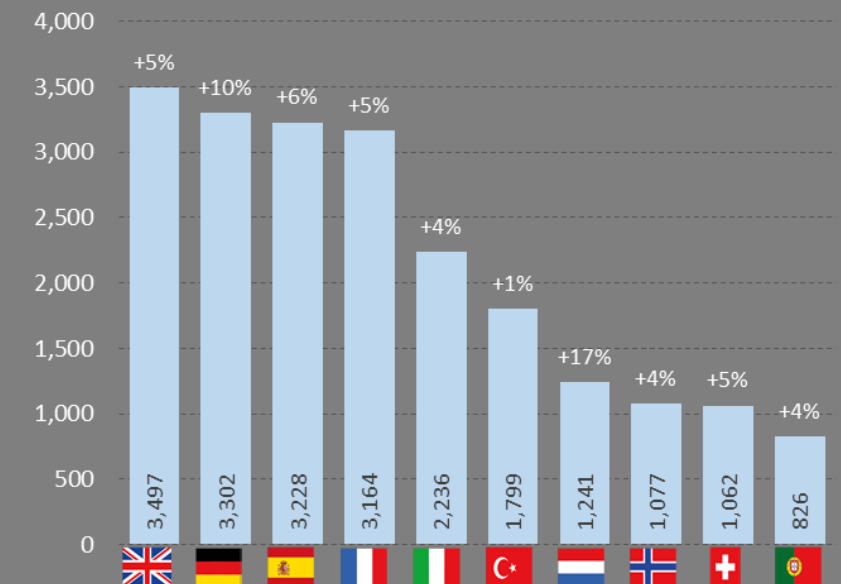
of equivalent week in 2019

## Top 10 Aircraft Operators on Week 24 Feb - 02 Mar 2022 (avg daily flights)

<b>1.</b>  easyJet Group Operated <b>1 118 flights</b> <b>↓28%</b> vs same week in 2019 <b>↑5%</b> vs prev week	<b>2.</b>  Turkish Airlines Operated <b>1 001 flights</b> <b>↓21%</b> vs same week in 2019 <b>↓1%</b> vs prev week	<b>3.</b>  Air France Group Operated <b>830 flights</b> <b>↓28%</b> vs same week in 2019 <b>↑4%</b> vs prev week
<b>4.</b>  Lufthansa Airlines Operated <b>797 flights</b> <b>↓47%</b> vs same week in 2019 <b>↑7%</b> vs prev week	<b>5.</b>  KLM Group Operated <b>634 flights</b> <b>↓19%</b> vs same week in 2019 <b>↑17%</b> vs prev week	<b>6.</b>  British Airways Grp Operated <b>470 flights</b> <b>↓47%</b> vs same week in 2019 <b>↑13%</b> vs prev week
<b>7.</b>  SAS Group Operated <b>440 flights</b> <b>↓48%</b> vs same week in 2019 <b>↑8%</b> vs prev week	<b>8.</b>  Wizz Air Group Operated <b>356 flights</b> <b>↓24%</b> vs same week in 2019 <b>↓7%</b> vs prev week	<b>9.</b>  Pegasus Operated <b>327 flights</b> <b>↓23%</b> vs same week in 2019 <b>↓2%</b> vs prev week
<b>10.</b>  Ryanair Group Operated <b>1 959 flights</b> <b>↑2%</b> vs same week in 2019 <b>↑0%</b> vs prev week		

## Top 10 Busiest States on week 24 Feb - 02-Mar 2022 (avg daily flights)

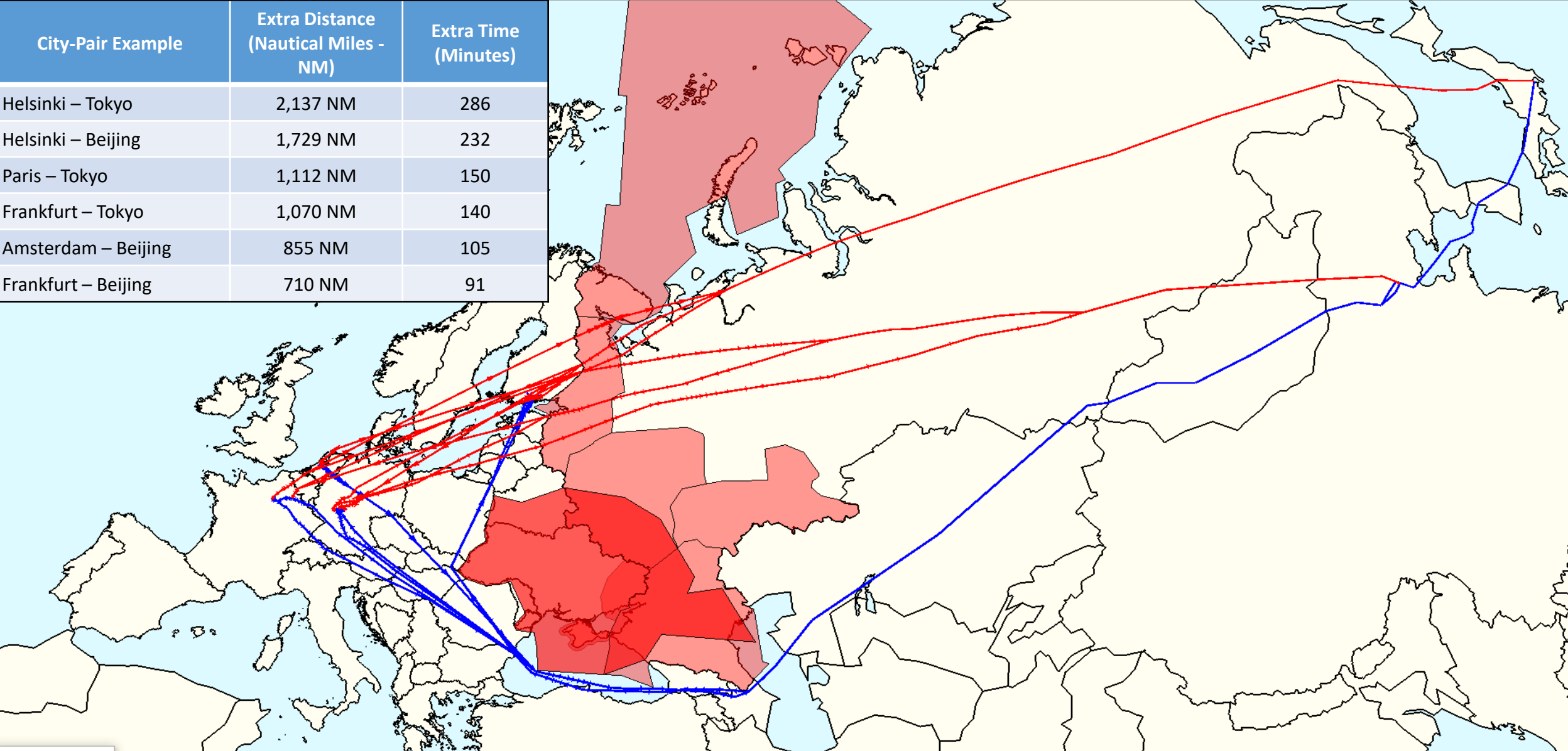
(Dep/Arr flights and comparison with previous week)



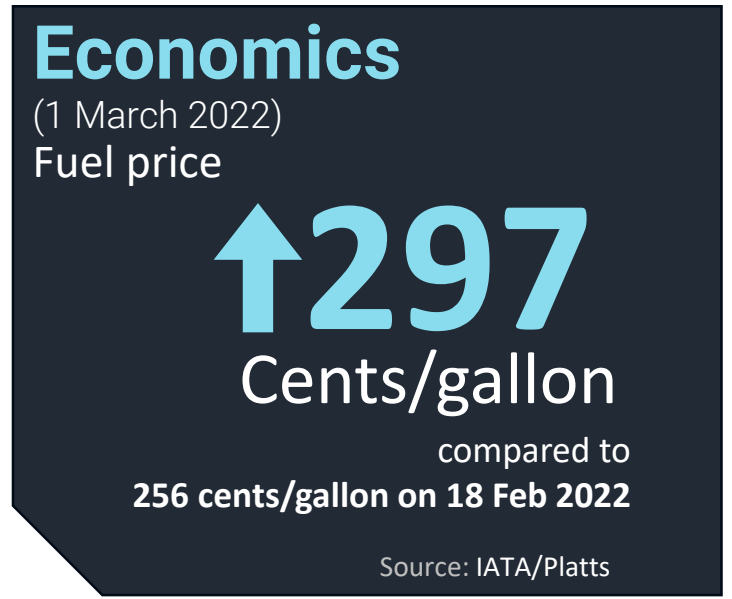
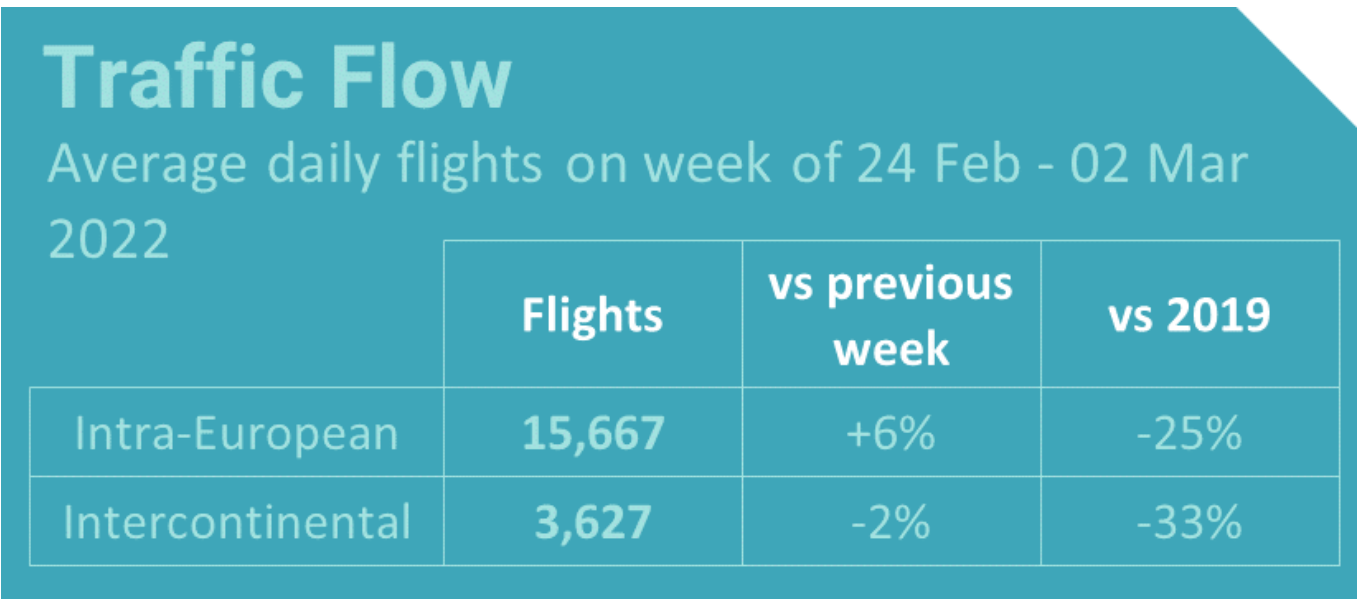
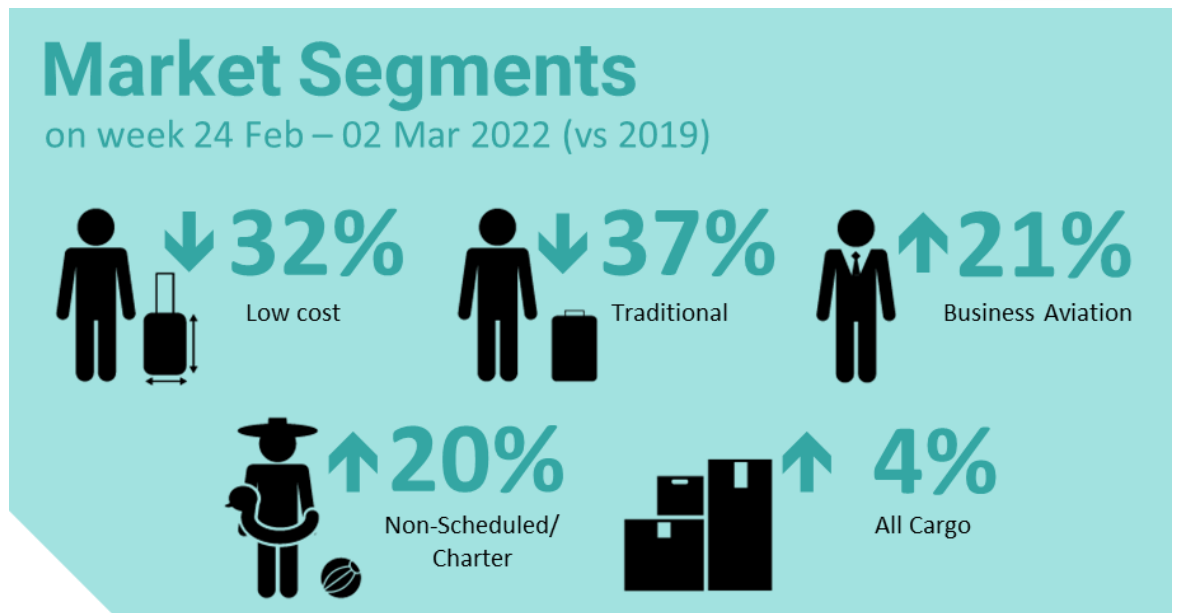
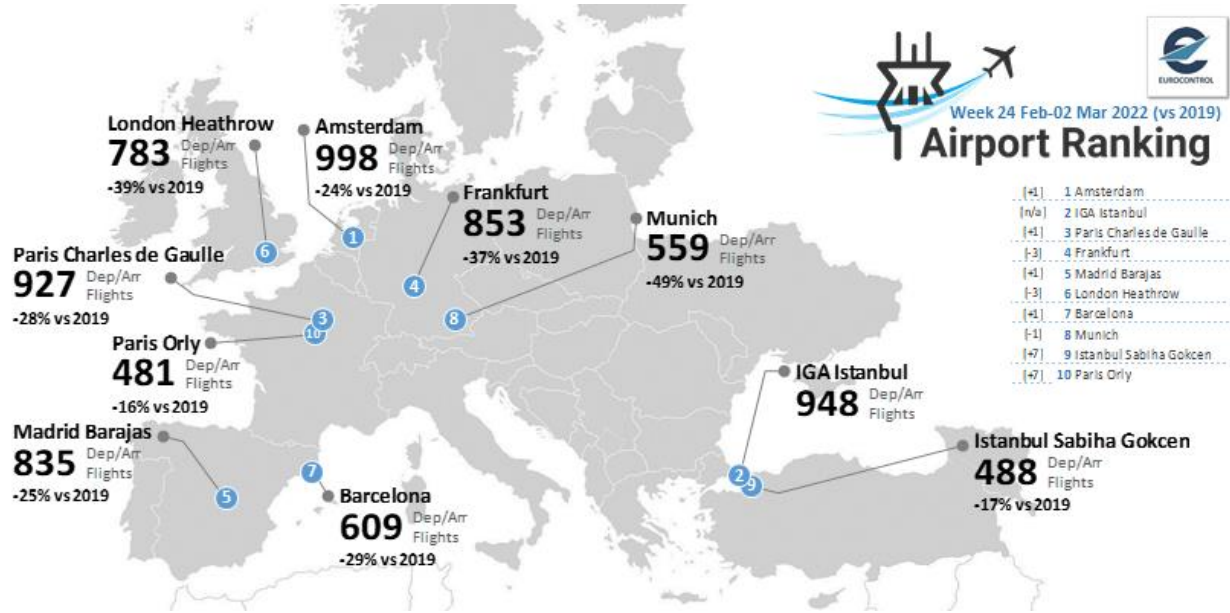
# Impact of Russian Airspace Closure on EU Operators

## – Sample Route/time extensions

City-Pair Example	Extra Distance (Nautical Miles - NM)	Extra Time (Minutes)
Helsinki – Tokyo	2,137 NM	286
Helsinki – Beijing	1,729 NM	232
Paris – Tokyo	1,112 NM	150
Frankfurt – Tokyo	1,070 NM	140
Amsterdam – Beijing	855 NM	105
Frankfurt – Beijing	710 NM	91



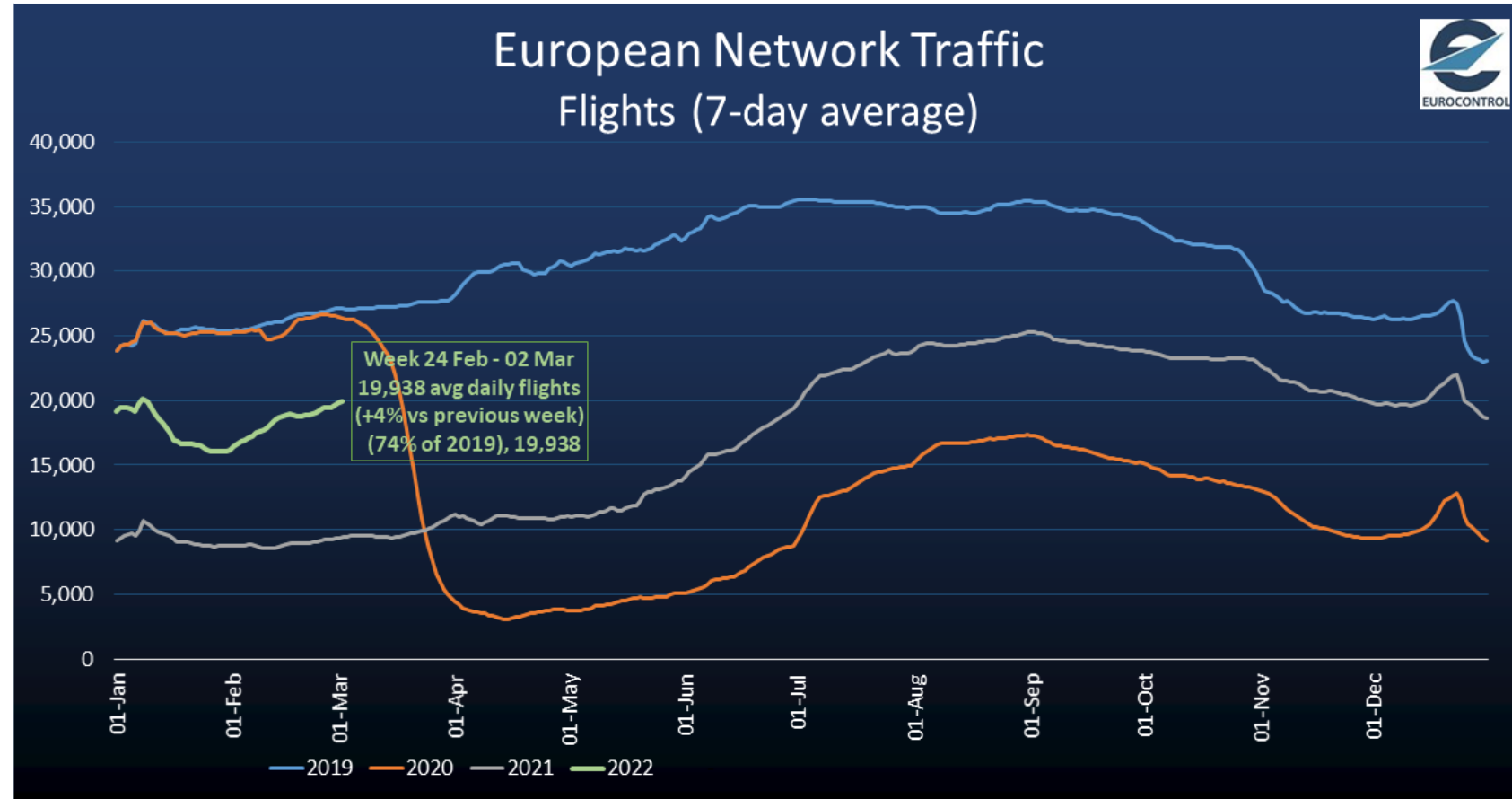
# Top 10 Busiest Airports



# Overall traffic situation at network level

## On week 24 Feb – 2 March:

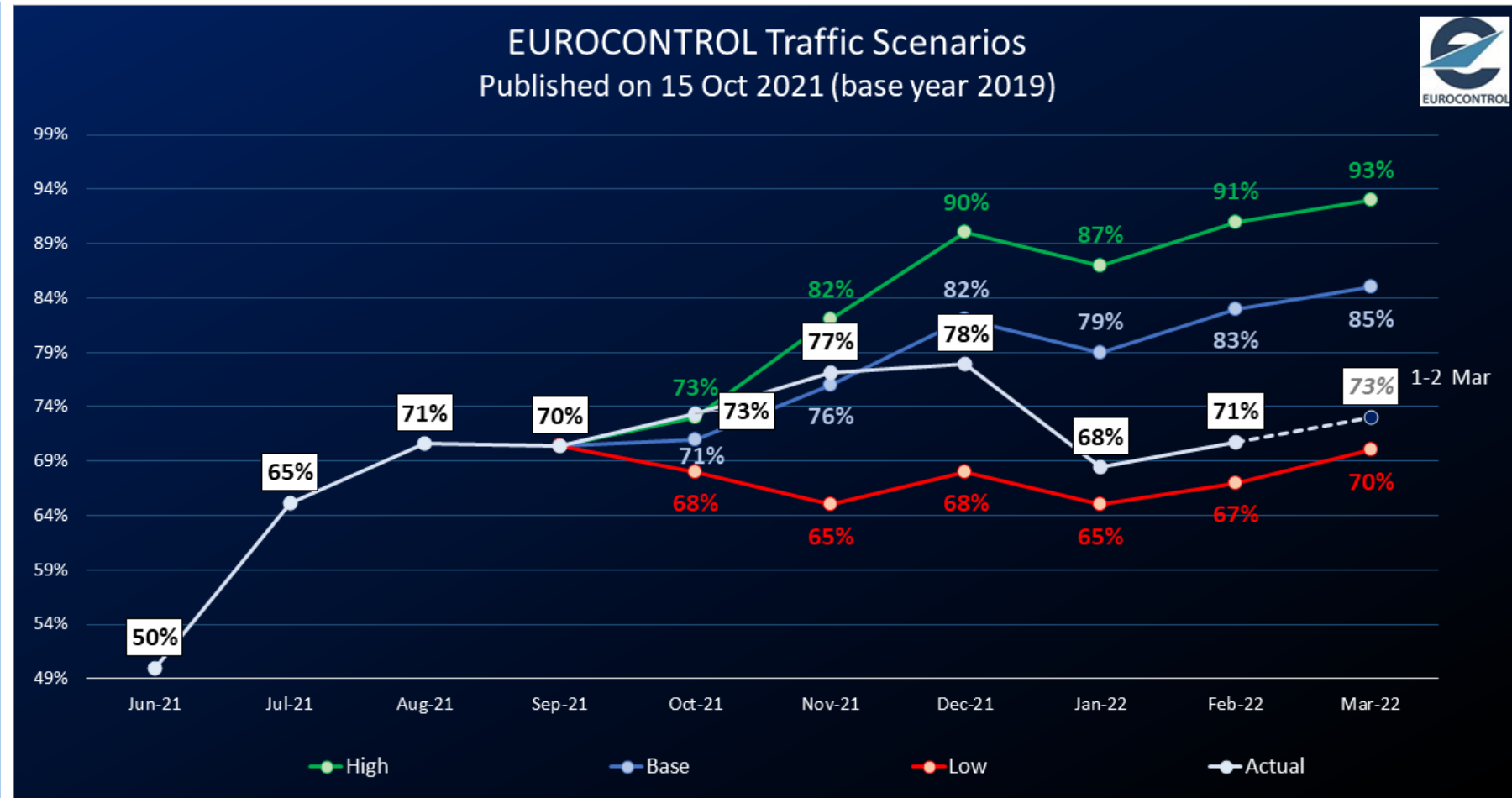
- ✈ **19,938** average daily flights.
- ✈ **+4%** on previous week.
- ✈ **74%** of 2019 traffic levels.



# Current situation compared to the latest EUROCONTROL traffic scenarios

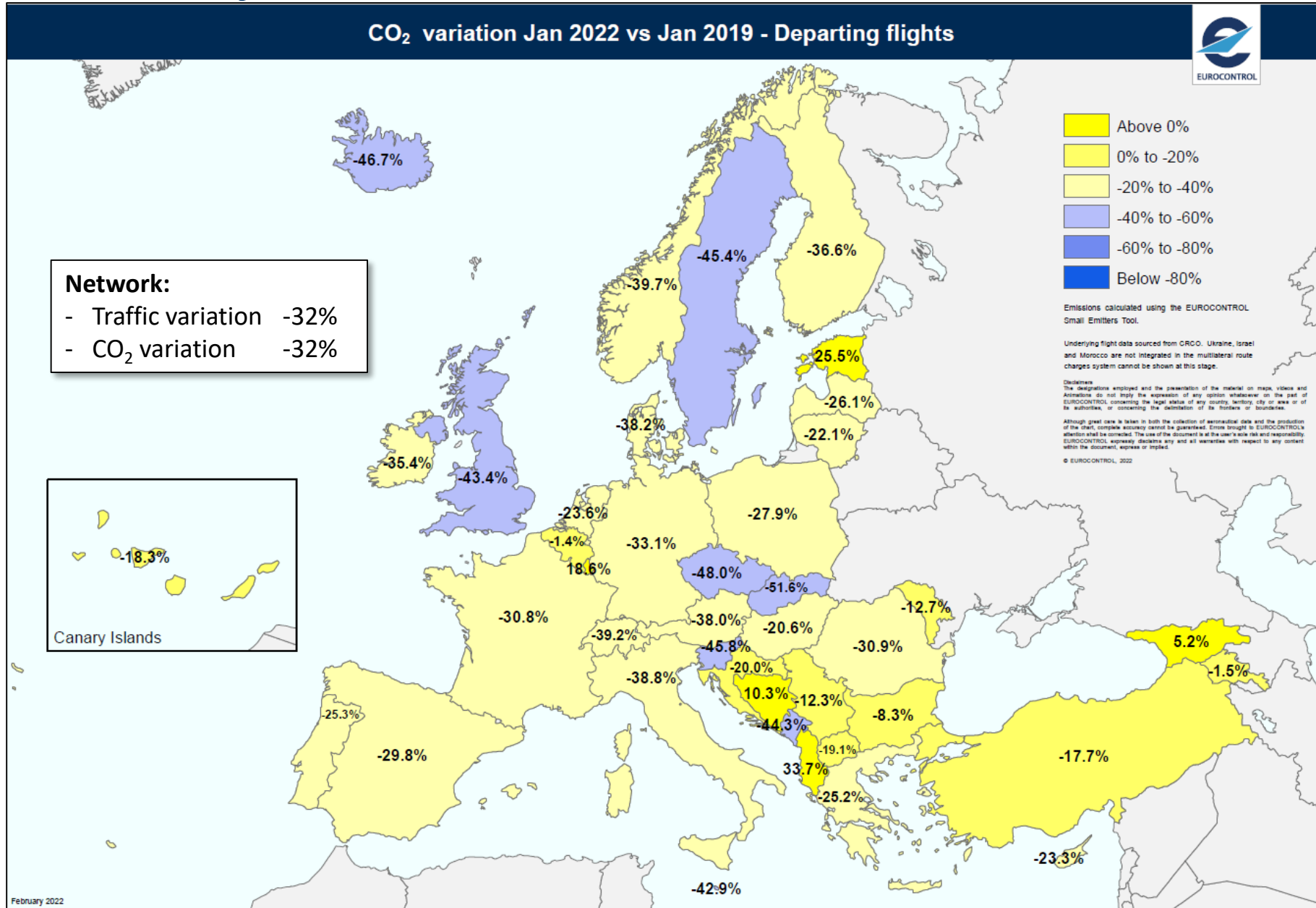


- ✘ In February 2022, **network traffic** was at **71%** compared to same period in 2019.
- ✘ Over the first 2 days of **March**, network traffic is at **73% of 2019** levels.
- ✘ Network traffic is between the low and medium scenario of the EUROCONTROL traffic scenarios published on 15 October 2021.



# Aviation Sustainability

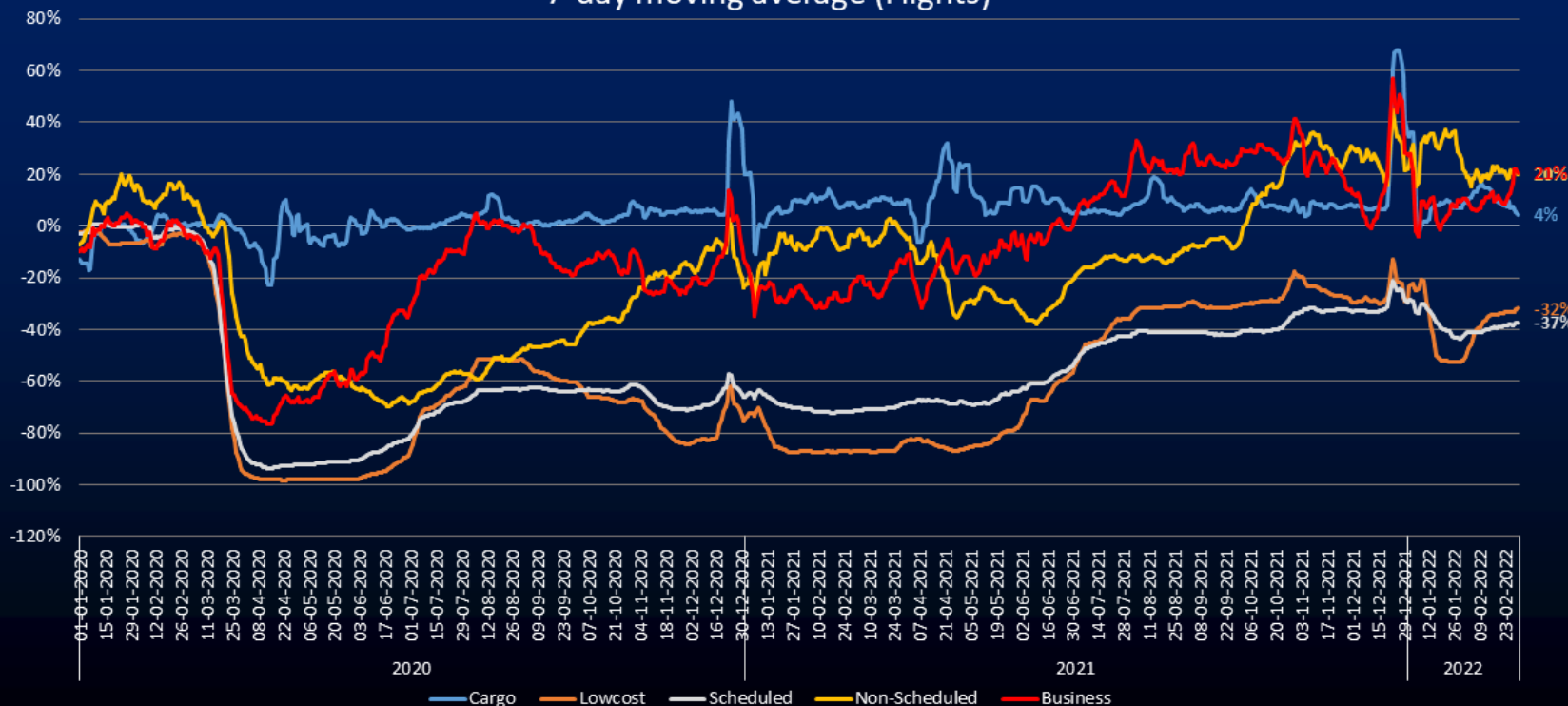
## Map





# 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 (+4%)**, and **Charter (+20%)** and **Business Aviation (+20%)** which saw a significant increase over the last week.
- ✘ **Traditional** improved at **-37%** vs 2019 and **Low-Cost** has been catching up in the last three weeks to **-32%** 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 (24 Feb - 02 Mar 2022)		
	Average flights per day	% vs 2019	% over previous week
RYANAIR	1,959	+2%	+0%
easyJet	1,118	-28%	+5%
TURKISH AIRLINES	1,001	-21%	-1%
AIRFRANCE	830	-28%	+4%
Lufthansa	797	-47%	+7%
KLM Royal Dutch Airlines	634	-19%	+17%
BRITISH AIRWAYS	470	-47%	+13%
Scandinavian Airlines	440	-48%	+8%
Wizz	356	-24%	-7%
PEGASUS	327	-23%	-2%

✘ **Ryanair** is the busiest Aircraft Operator with 1,959 flights per day on average over last week, followed by **easyJet** (1,118), **Turkish Airlines** (1,001), **Air France** (830), **Lufthansa** (797) and **KLM** (634).

Within the top 10, **seven** airlines posted **increases** over the week before, highest being:

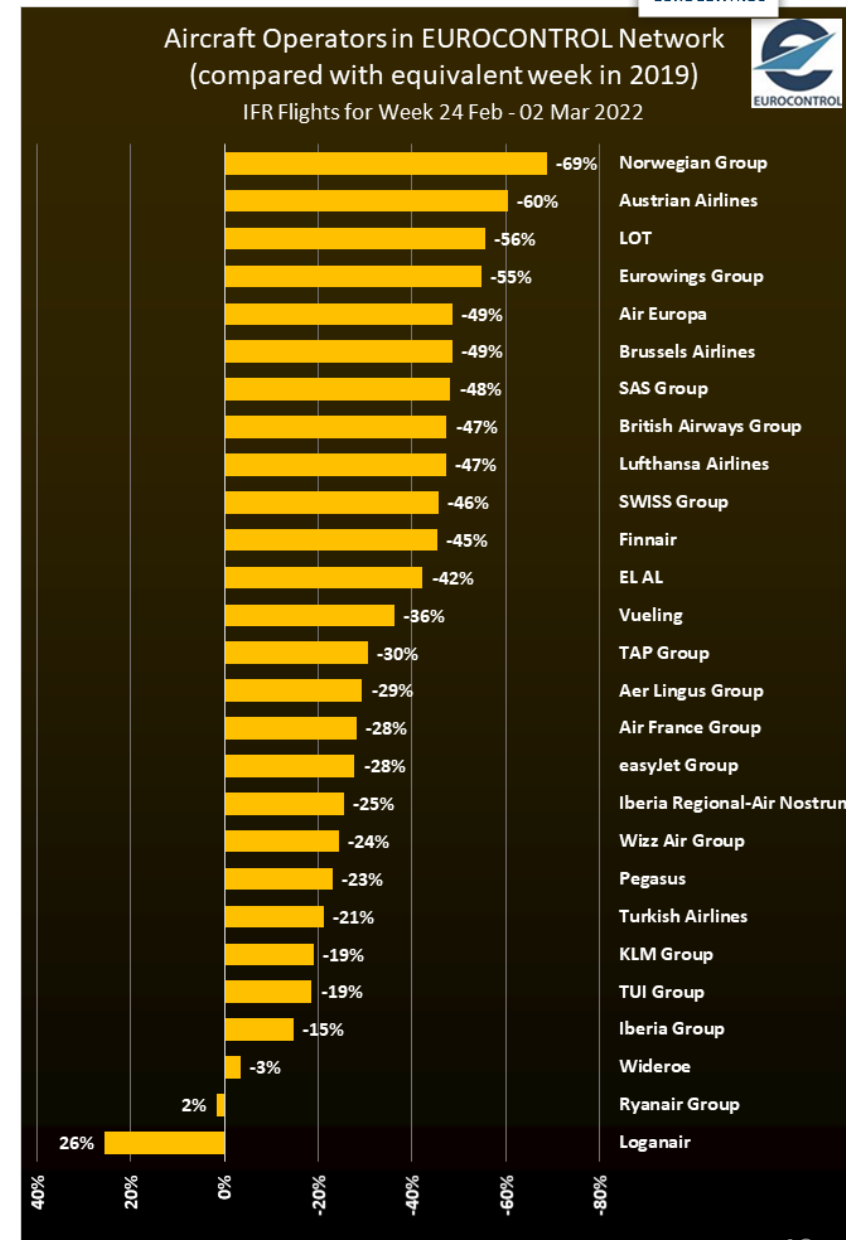
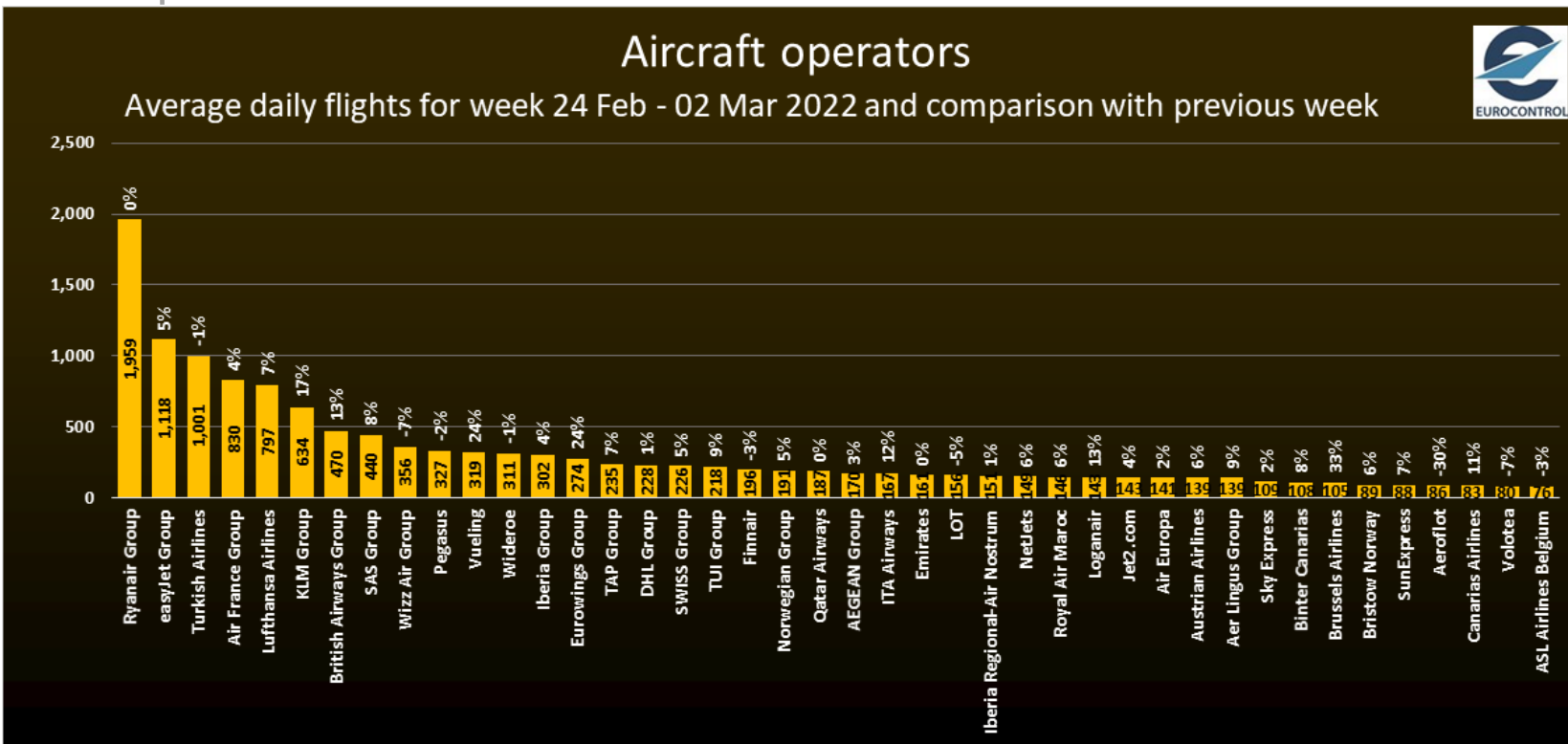
- ✘ **KLM** (+93 flights; +17%) due to flows between Netherlands and UK, Germany, Norway and Spain.
- ✘ **British Airways** (+53 flights; +13%) due to flows UK-Germany and UK-UK.
- ✘ **easyJet** (+52 flights; +5%) due to flows UK-UK, UK-Netherlands, Italy-Italy and France-France.
- ✘ **Lufthansa** (+52 flights; +7%) due to domestic flows in Germany and flows between Germany and Italy, Poland, Spain and UK.

Over the top 10, **three** airlines **decreased** on previous week:

- ✘ **Wizz Air** (-26 flights; -7%), **Turkish Airlines** (-12 flights; -1%) and **Pegasus** (-8 flights; -2%).

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

## Top 40



- ✦ Largest increases in flights vs previous week for **KLM (+17%)**, **Vueling (+24%)**, **British Airways (+13%)**, **easyJet (+5%)**, **Eurowings (+24%)**, **Lufthansa (+7%)**, **SAS (+8%)**, **Air France (+4%)** and **Brussels Airlines (+33%)**.
- ✦ Highest decreases for **Wizz Air (-7%)**, **Turkish Airlines (-1%)** and **LOT (-5%)**.
- ✦ Traffic levels ranging from **-69% (Norwegian)** to **+26% (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 24 February - 2 March 2022



## PERFORMANCE OF MAJOR LOW-COST CARRIERS

for the week 24 February - 2 March 2022



## PERFORMANCE OF MAJOR LONG-HAUL/LEGACY CARRIERS

for the week 24 February - 2 March 2022



## PERFORMANCE OF MAJOR REGIONAL CARRIERS\*

for the week 24 February - 2 March 2022



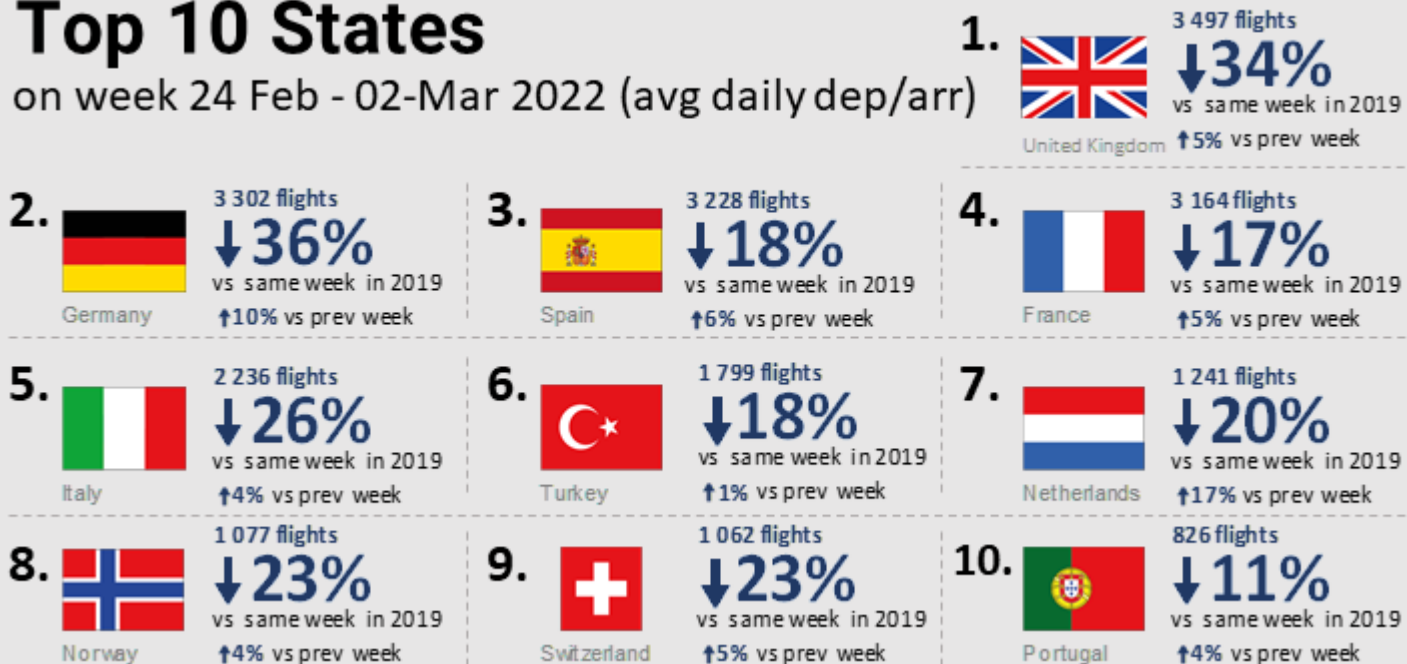
\*REGIONAL AIRLINES USING SEPARATE IATA CODES

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



## Top 10 States

on week 24 Feb - 02-Mar 2022 (avg daily dep/arr)



✘ **UK** is the State with the highest number of dep/arr flights on average over last week (3,497) followed by **Germany** (3,302), **Spain** (3,228), **France** (3,164) and **Italy** (2,236).

✘ Comparing with previous week, the ranking of the top 4 has changed, with Germany outpacing Spain and France.

Within the top 10, **all** States posted flight increases over the previous week:

✘ **Germany** (+312 flights; +10%) due to light AOs, Lufthansa and Eurowings. Mainly domestic flows and flows with Spain, UK, Italy, Austria and Netherlands.

✘ **Spain** (+186 flights; +6%) mainly due to Vueling, Eurowings, Binter Canarias and Canarias Airlines. Domestic slows as well as flows with Germany.

✘ **Netherlands** (+179 flights; +17%) due to KLM and light AOs. Domestic flows and flows with Netherlands.

✘ **UK** (+156 flights; +5%) due to light AOs, Logan Air and British Airways. Mainly domestic flows.

✘ **France** (+154 flights; +5%) due to light AOs, Air France and easyJet. Domestic flows.

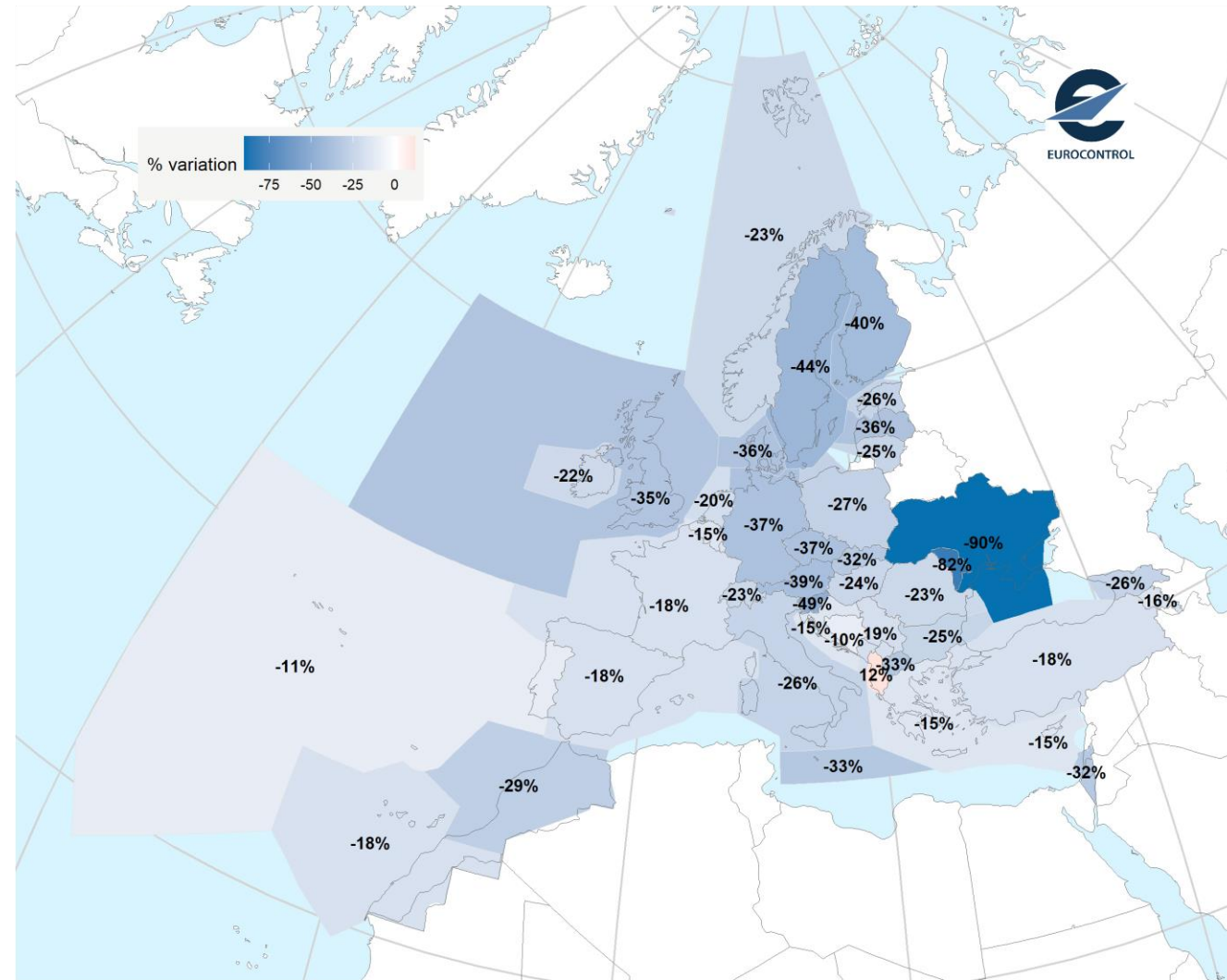
# States (Average Daily Departure/Arrival flights for the last week)



Map

State FIR daily % arrivals/departures variation vs 2019 on 2022-03-01

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

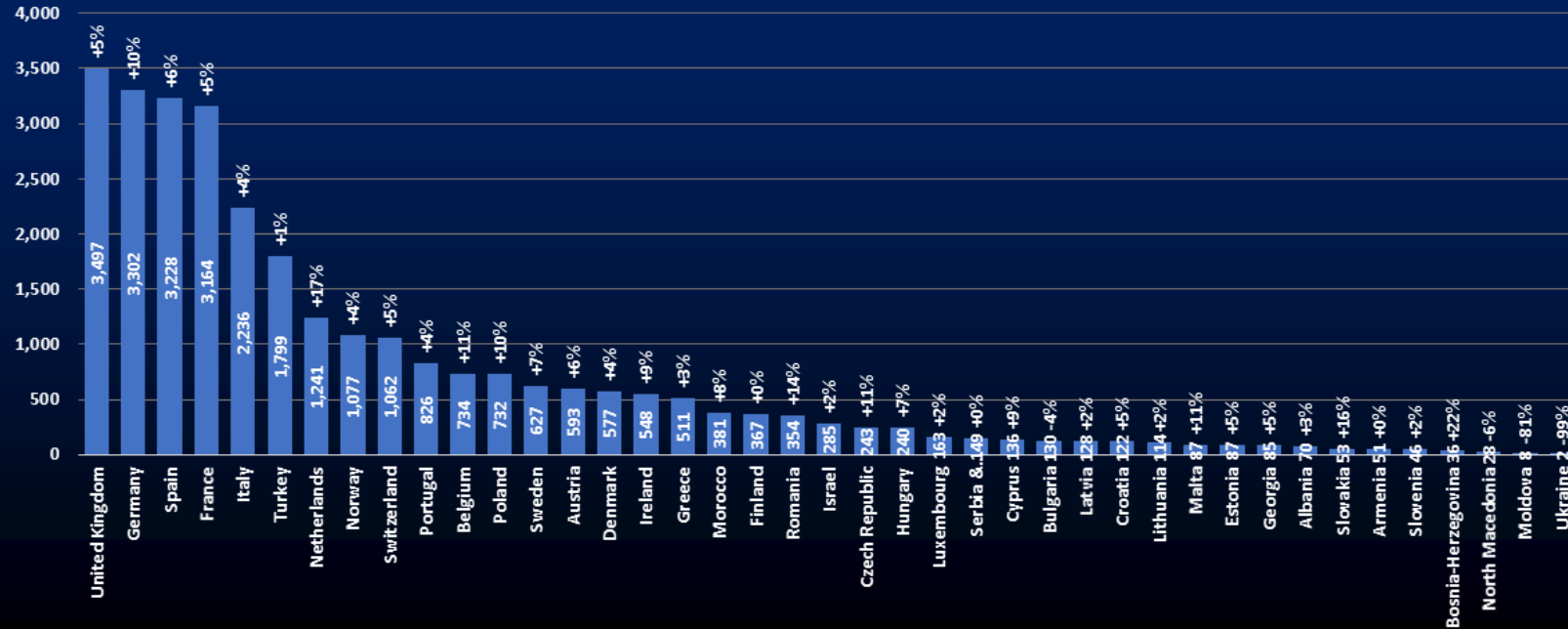
# States (Average Daily Departure/Arrival flights for the last week)

Top 40



## States (Dep/Arr flights)

Average daily flights for week 24 - 02 Mar 2022 and comparison with previous week



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

IFR Dep/Arr Flights for Week 24 Feb - 02 Mar 2022

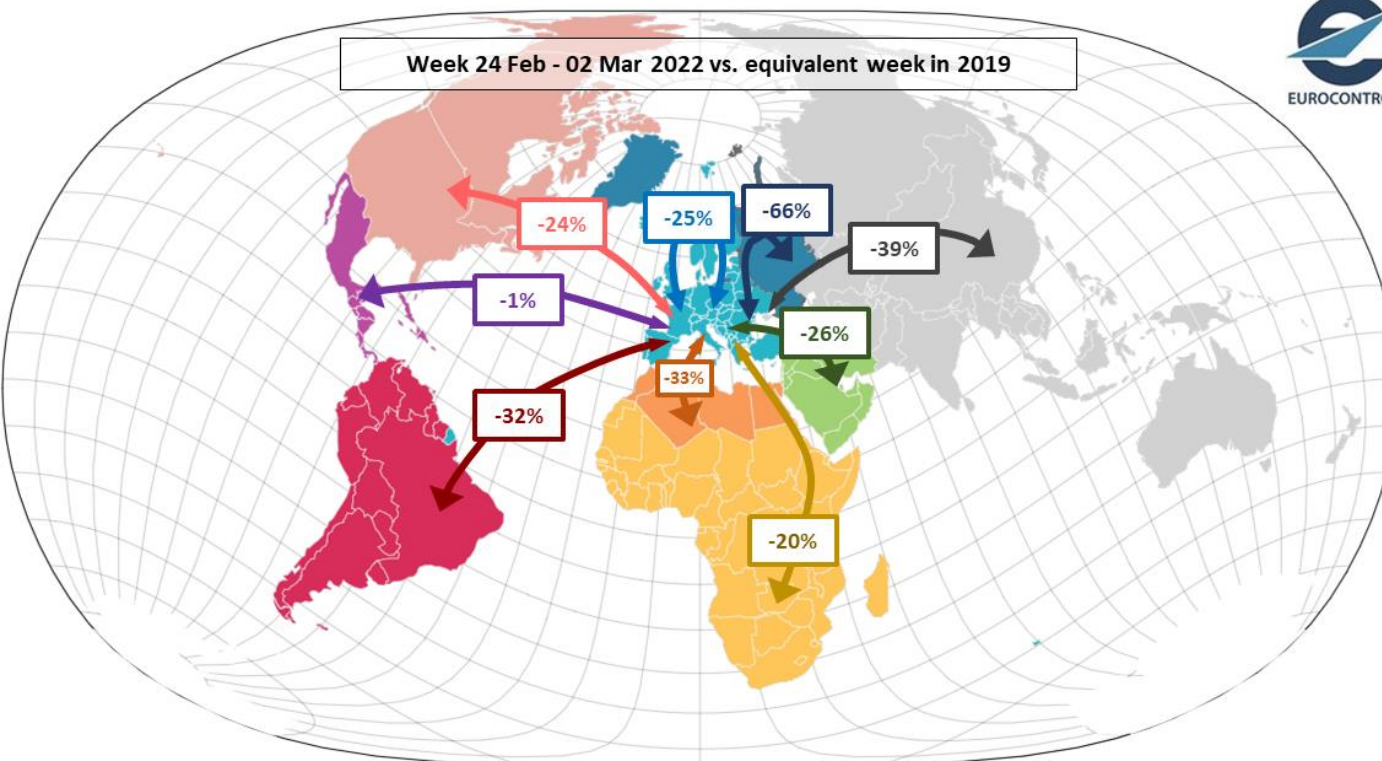


- ✘ Highest increases in flights vs previous week for **Germany (+10%)**, **Spain (+6%)**, **Netherlands (+17%)**, **UK (+5%)** and **France (+5%)**.
- ✘ Highest decreases for **Ukraine (-99%)**, **Moldova (-81%)** and **Bulgaria (-4%)**.
- ✘ Traffic levels ranging from -100% (**Ukraine**) and -88% (**Moldova**) to +18% (**Albania**), compared to 2019.

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

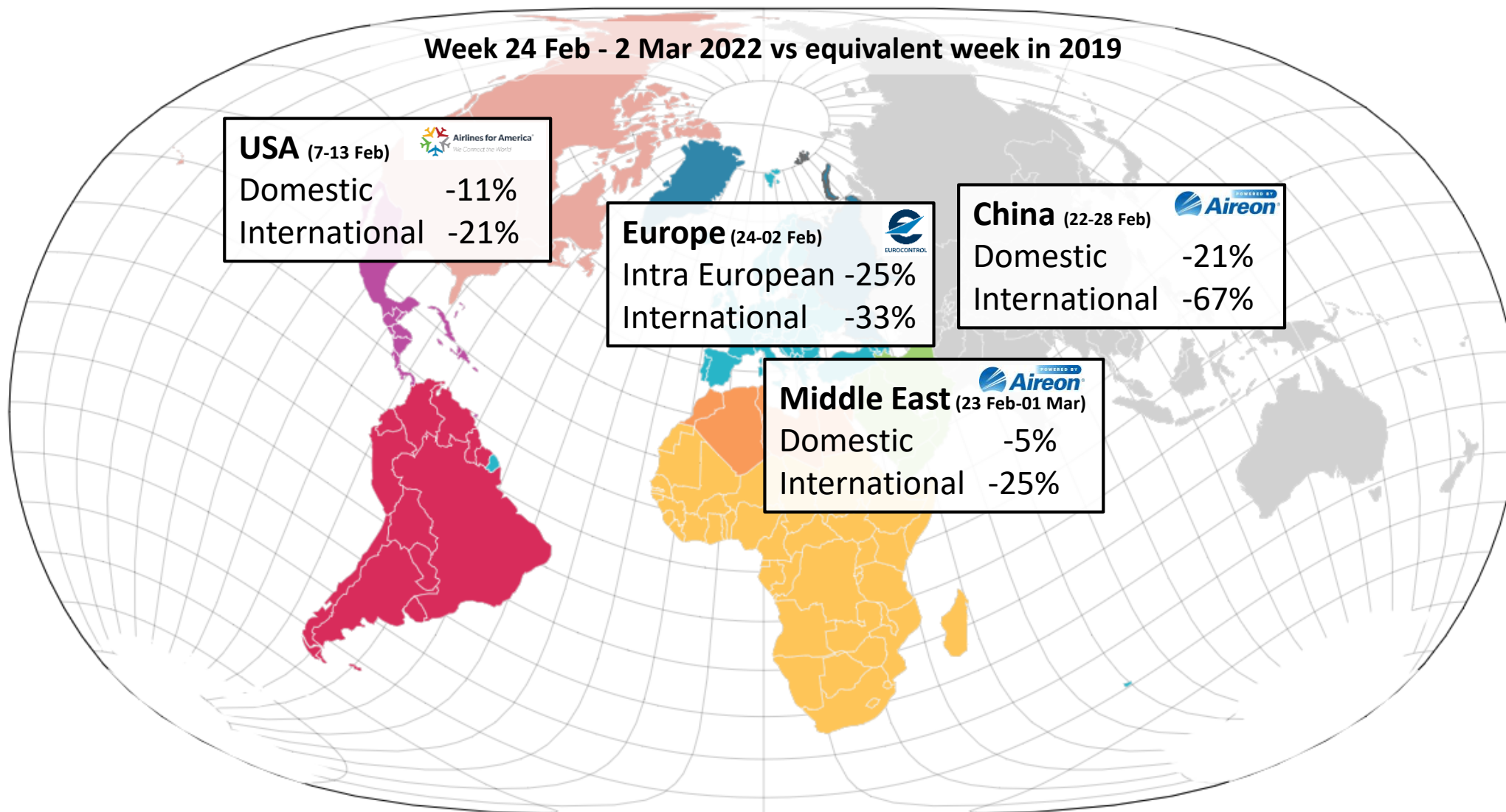


- ✘ The main traffic flow is the intra-Europe flow with 15,667 flights on average the most recent week, increasing by +6% over previous week.
- ✘ Significant reduction over one week for the flow between Europe and Other Europe (incl. Russia) with -34%.
- ✘ Intra-Europe flights are at -25% compared to 2019 while intercontinental flows are at -33%.



REGION (Average daily flights)	Week 17/02/2022 - 23/02/2022	Week 24/02/2022 - 02/03/2022	%	vs. 2019
<b>Intra-Europe</b>	<b>14,726</b>	<b>15,667</b>	<b>+6%</b>	<b>-25%</b>
Europe<->Asia/Pacific	473	472	-0%	-39%
Europe<->Mid-Atlantic	191	190	-1%	-1%
Europe<->Middle-East	943	958	+2%	-26%
Europe<->North Atlantic	685	727	+6%	-24%
Europe<->North-Africa	615	629	+2%	-33%
Europe<->Other Europe	403	267	-34%	-66%
Europe<->South-Atlantic	125	122	-2%	-32%
Europe<->Southern Africa	272	262	-3%	-20%
<b>Non Intra-Europe</b>	<b>3,706</b>	<b>3,627</b>	<b>-2%</b>	<b>-33%</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 24 Feb - 02-Mar 2022				
	Airport-Pair	Avg daily flights	Δ vs prev. week	% vs prev. week	% vs 2019
→	London/Heathrow <-> New York JFK	25	↗ +1	+5%	↘ -37%
→	London/Heathrow <-> Dubai	17	→ +0	+1%	↘ -13%
→	Paris/Charles-De-Gaulle <-> New York JFK	14	→ +0	+2%	↗ +3%
→	Paris/Charles-De-Gaulle <-> Dubai	13	→ +0	+1%	↗ +21%
→	Frankfurt <-> Seoul/Inchon INTL	11	→ +0	+0%	↗ +32%
↗	Amsterdam <-> Dubai	10	→ +1	+6%	↗ +18%
→	London/Heathrow <-> Hamad INTL	10	→ -0	-1%	↘ -20%
→	Madrid/Barajas <-> Bogota Intl/Eldorado	10	→ +0	+1%	↘ -4%
↗	London/Heathrow <-> Los Angeles	10	→ +1	+8%	↘ -45%
↗	Milan/Malpensa <-> New York JFK	9	→ +0	+3%	↗ +8%
↗	Frankfurt <-> Chicago O Hare Intl	9	→ +0	+2%	↘ -7%
↘	Paris/Orly <-> Pointe-A-Pitre/Le Ra	9	↘ -1	-14%	↘ -29%
↗	London/Heathrow <-> Chicago O Hare Intl	9	↗ +1	+18%	↘ -46%
↘	Paris/Orly <-> Fort de France	9	→ -1	-9%	↘ -22%
↗	Frankfurt <-> Shanghai Pudong Intl	8	↗ +2	+26%	↘ -32%
↘	London/Heathrow <-> Delhi	8	→ -1	-7%	↘ -34%
↘	London/Heathrow <-> Miami Intl/Florida	8	→ -1	-7%	↘ -32%
↗	Paris/Charles-De-Gaulle <-> Atlanta Intl/Hart	8	→ +0	+6%	↘ -2%
↗	Madrid/Barajas <-> Mexico City	8	→ +0	+6%	↘ -2%
→	Frankfurt <-> Dubai	8	→ +0	+4%	↘ -4%

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

**Increases for:**

- ✂ London/LHR – New York JFK (+1 flight)
- ✂ Amsterdam – Dubai (+1 flight)
- ✂ London/LHR – Los Angeles (+1 flight)
- ✂ London/LHR – Chicago O Hare (+1 flight)
- ✂ Frankfurt – Shanghai (+2 flights)

**Decreases for:**

- ✂ Paris/Orly – Guadeloupe & Martinique (-1 flight)
- ✂ London Heathrow – New Delhi (-1 flight)
- ✂ London Heathrow – Miami (-1 flight)

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

## Top 10



Rank evolution over prev. week	Top 10 Country-Pair on week 24 Feb - 02-Mar 2022				
	Country-Pair	Avg daily flights	Δ vs prev. week	% vs prev. week	% vs 2019
→	Spain <-> Spain	988	↗ +59	+6%	↘ -14%
→	France <-> France	911	↗ +57	+7%	↘ -8%
→	Norway <-> Norway	689	↗ +12	+2%	↘ -14%
↗	United Kingdom <-> United Kingdom	682	↗ +74	+12%	↘ -31%
→	Italy <-> Italy	649	↗ +19	+3%	↘ -11%
↘	Turkey <-> Turkey	647	→ +0	+0%	↘ -30%
→	Germany <-> Germany	535	↗ +119	+29%	↘ -42%
→	Spain <-> United Kingdom	424	↗ +13	+3%	↘ -23%
→	Germany <-> Spain	337	↗ +37	+13%	↘ -23%
→	France <-> United Kingdom	249	↗ +10	+4%	↘ -27%

✘ 7 of the top 10 flows are domestic.

✘ **Spain-Spain** is the country-pair with the highest number of dep/arr flights (988) followed by **France-France** (911), **Norway-Norway** (689), **UK-UK** (682), **Italy-Italy** (649), **Turkey-Turkey** (647) and **Germany-Germany** (535).

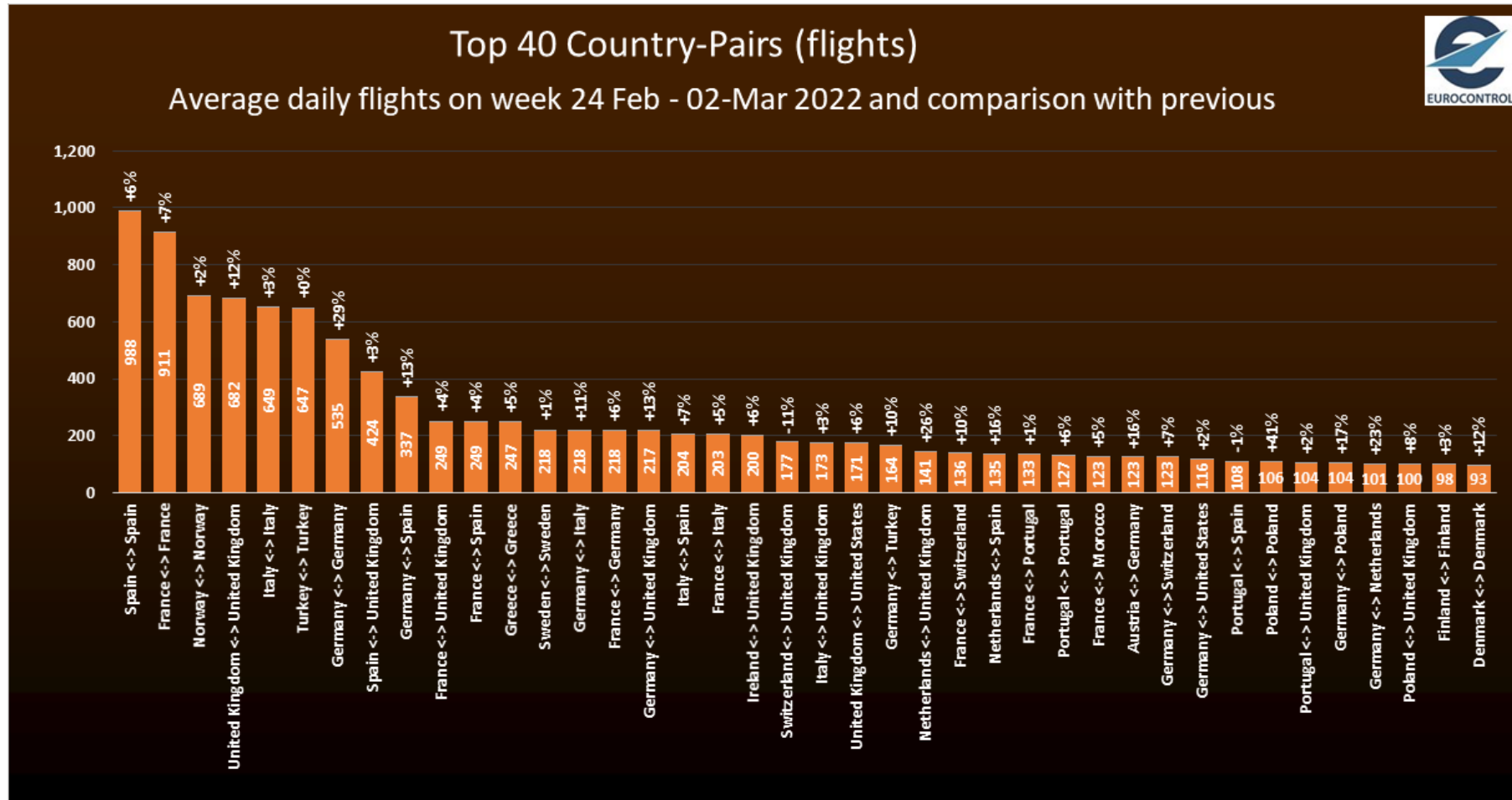
✘ Over the previous, domestic flows in UK increased their ranking whereas, domestic flows in Turkey decreased their ranking.

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

- ✘ **Germany-Germany** (+119 flights; +29%) owing to light AOs and Lufthansa.
- ✘ **UK-UK** (+74 flights; +12%) to light AOs and Loganair.
- ✘ **Spain-Spain** (+59 flights; +6%) mainly due Vueling, followed by Binter Canarias, Canarias Airlines and Iberia Express.
- ✘ **France-France** (+57 flights; +7%) mainly due to light AOs.
- ✘ **Germany-Spain** (+37 flights; +13%) mainly due to Eurowings, followed by Condor, Lufthansa and Vueling.
- ✘ **Germany-Spain** (+37 flights; +13%) mainly due to Eurowings, followed by Condor, Lufthansa and Vueling.

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

Top 40



- ✘ Highest increase in flights vs previous week for **Germany-Germany (+29%)**, **UK-UK (+12%)**, **Spain-Spain (+6%)**, **France-France (+7%)**, **Germany-Spain (+13%)** and **Poland-Poland (+41%)**.
- ✘ Highest decrease for **Switzerland-UK (-11%)**.

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



## Top 10

Rank evolution over prev. Week	Top 10 Airports on week 24 Feb - 02 Mar 2022				
	Airport	Average Daily Dep/Arr Flights	Δ over prev. week	% over prev. week	% vs 2019
↗	Amsterdam	998	↗ +132	+15%	↘ -24%
↘	IGA Istanbul Airport	948	↗ +4	+0%	↗ N/A
↘	Paris/Charles-De-Gaulle	927	↗ +36	+4%	↘ -28%
↗	Frankfurt	853	↗ +48	+6%	↘ -37%
↘	Madrid/Barajas	835	↗ +29	+4%	↘ -25%
→	London/Heathrow	783	↗ +46	+6%	↘ -39%
↗	Barcelona	609	↗ +68	+13%	↘ -29%
↘	Munich	559	↗ +8	+2%	↘ -49%
→	Istanbul/Sabiha Gokcen	488	↘ -8	-2%	↘ -17%
→	Paris/Orly	481	↗ +15	+3%	↘ -16%

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

- ✘ **Amsterdam** (+132 flights; +15%) mainly due to KLM. Flows with UK, Germany, Spain, France, Italy and Norway.
- ✘ **Barcelona** (+68 flights; +13%) mainly due to Vueling. Mainly flows within Spain and flows with UK and Netherlands
- ✘ **Frankfurt** (+48 flights; +6%) mainly due to Lufthansa. Domestic flows and with Italy.
- ✘ **London/Heathrow** (+46 flights; +6%) due to British Airways. Flows with Germany, US, UK, France, Ireland, Belgium and Italy.

One airport showed a decrease:

- ✘ **Istanbul/Sabiha** (-8 flights; -2%) due to Pegasus. Flows with Ukraine and Russia.

✘ **Amsterdam** is the airport with the highest number of dep/arr flights (998) followed by **Istanbul IGA** (948), **Paris/CDG** (927), **Frankfurt** (853) and **Madrid/Barajas** (835).

✘ **Amsterdam**, **Frankfurt** and **Barcelona** saw their ranking increasing compared to previous week while **IGA Istanbul**, **Paris/CDG**, **Madrid** and **Munich** decreased their ranking.

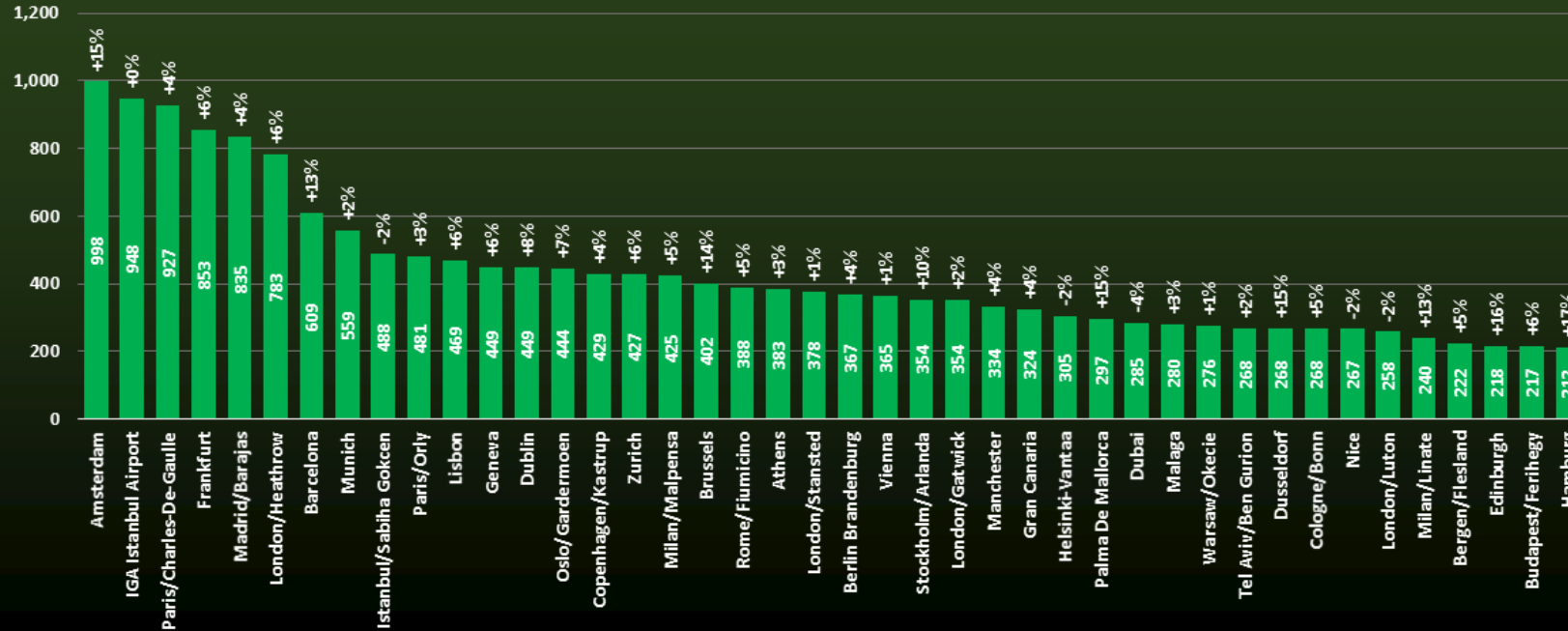
# Airports (Average Daily Departure/Arrival flights for the last week)

## Top 40



### Top 40 Airports (Dep/Arr flights)

Average daily flights for week 24 Feb - 02 Mar 2022 and comparison with previous week



✘ Highest increases in flights vs 2019 for **Amsterdam (+15%)**, **Barcelona (+13%)**, **Brussels (+14%)**, **Frankfurt (+6%)**, **London/Heathrow (+6%)** and **Palma (+15%)**.

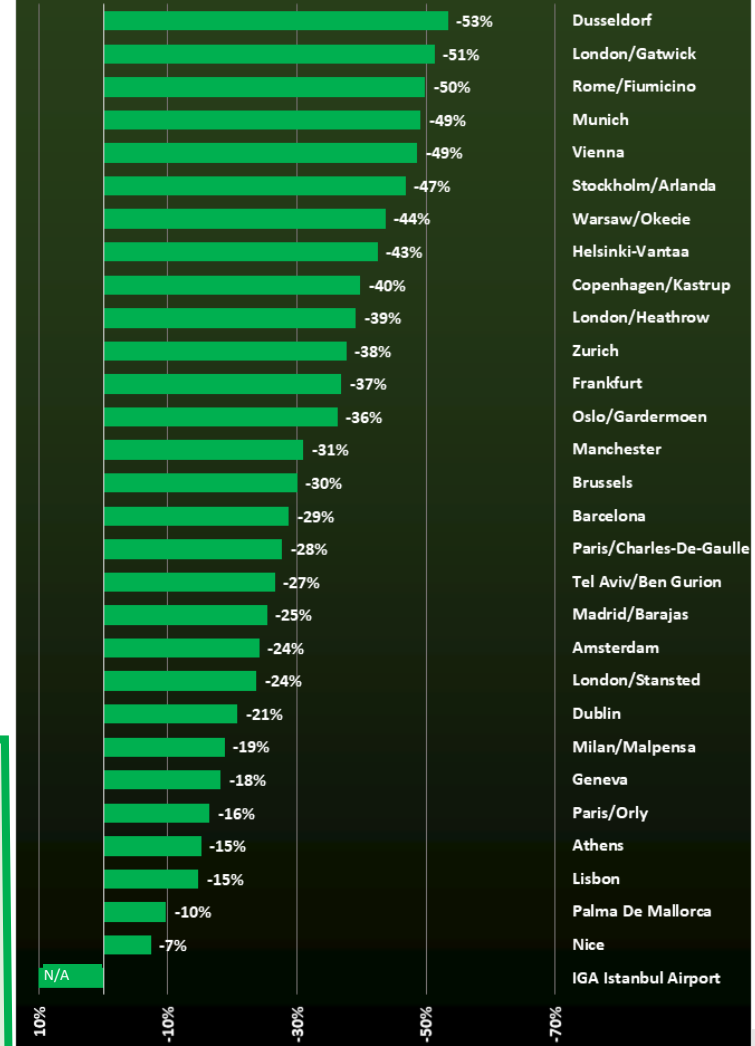
✘ Highest decreases for **Istanbul/Sabiha (-4%)**, **Helsinki (-2%)** and **Nice (-2%)**.

✘ Traffic levels ranging from -53% (Dusseldorf) to -7% (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)



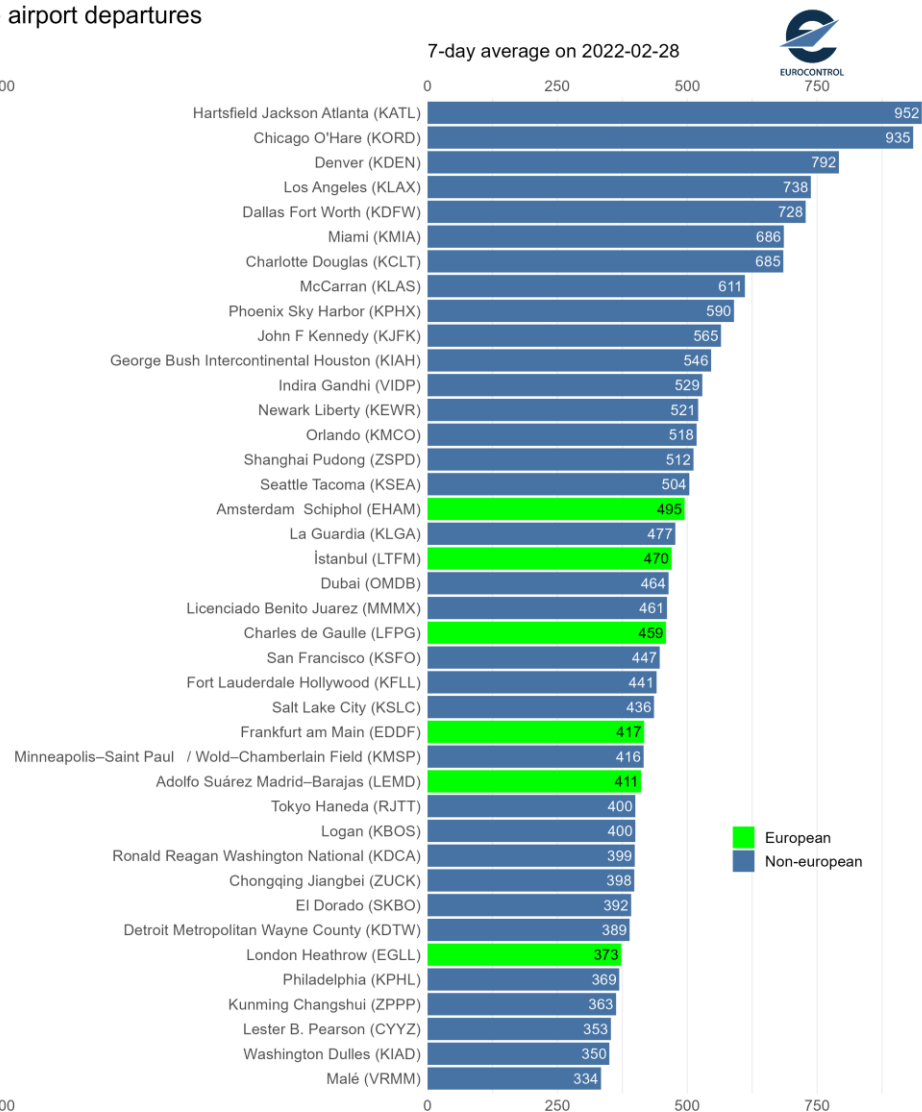
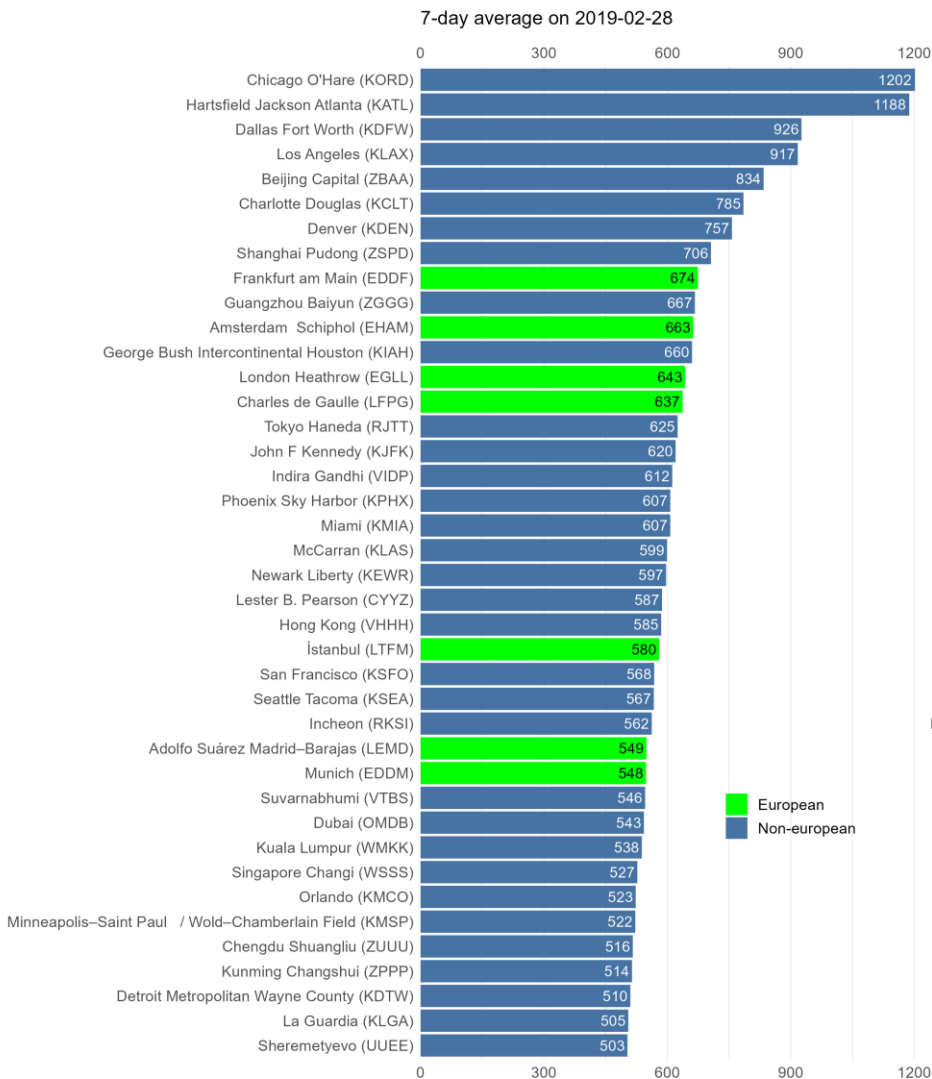
IFR Dep/Arr Flights for Week 24 Feb - 02 Mar 2022



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



Top 40 worldwide airport departures



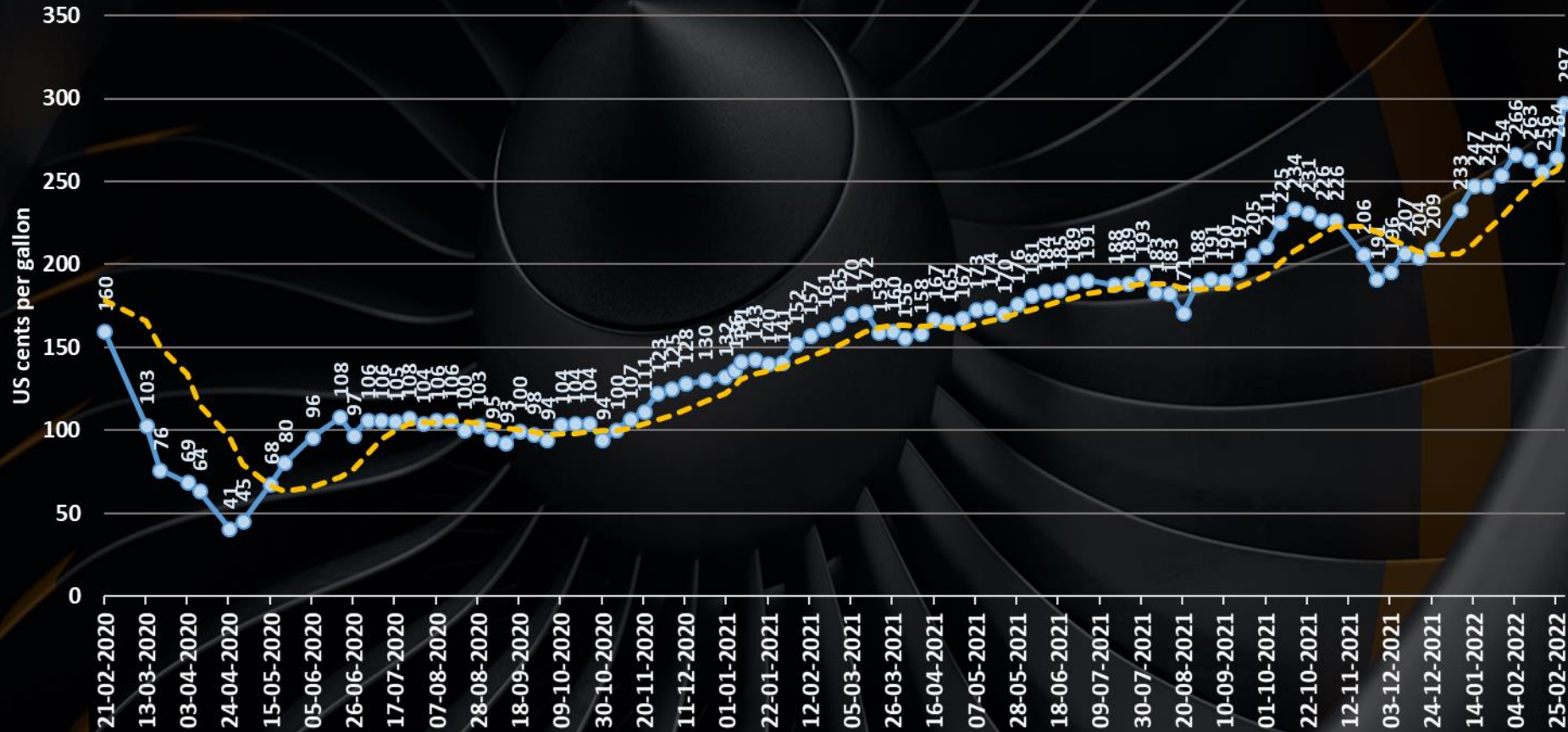
Source: Flightradar24 Historical Global Utilisation data

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

- ✘ Six European airports are ranked in the top 40 global airports, with one: Amsterdam in the first half (four of them were in the first half in 2019).
- ✘ The top 11 global airports are currently all based in the US.
- ✘ The first Asian airport is currently Shanghai (15<sup>th</sup>); where it used to be Beijing (5<sup>th</sup> in 2019).



## Jet Fuel Price Europe



Source: IATA/Platts

- ✖ Jet fuel prices have jumped to 297 cts/gallon on 1 March amid the Ukraine conflict (+13% over 4 days).
- ✖ Jet fuel prices averaged 262 cts/gallon in February (+30% vs Feb 2019 & +65% vs Feb 2021).

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)



© EUROCONTROL - February 2022

This document is published by EUROCONTROL for information purposes. It may be copied in whole or in part, provided that EUROCONTROL is mentioned as the source and it is not used for commercial purposes (i.e. for financial gain). The information in this document may not be modified without prior written permission from EUROCONTROL.

[www.eurocontrol.int](http://www.eurocontrol.int)