

31 March 2022



EUROCONTROL

Comprehensive Assessment

EUROPEAN AVIATION



SUPPORTING EUROPEAN AVIATION



NETWORK
MANAGER



Headlines (Week of 24 – 30 Mar 2022)

- **22,387 daily flights** on average over past week, **increasing** by **9%** vs **previous week**; 77% of 2019 levels.
- With the beginning of the **Summer schedules**, **low-cost** airlines have **expanded capacities** throughout the network especially to the South of Europe. Traditional airlines are also expanding, to a lesser extent.
- Over the past week, Ryanair was the busiest aircraft operator with 2,503 flights per day on average, followed by easyJet (1,383), Turkish Airlines (1,100), Lufthansa (930) and Air France (870).
- The closure of **Ukrainian airspace to civilian flights since 24 Feb**, and the closure of **Russian airspace** for 36 States **since 28 Feb** has a limited impact at European level. **No traffic in Ukraine**.
- Domestic traffic vs 2019: Europe (-20%), USA (-18%), China (-75%, massive lockdown in Shanghai due new COVID-19 wave) and Middle-East (-2%).
- **Jet fuel prices increased to 390 cts/gallon** on 25 March (+14% over 1 week +48% over 1 month).
- Business Aviation (while above 2019 levels) has accelerated again in the recent days.



Traffic Situation

Average daily flights (including overflights)

On week 24 - 30 Mar 2022

77%

of equivalent week in 2019

Top 10 Aircraft Operators on Week 24 - 30 Mar 2022 (avg daily flights)



2. Operated **1 383 flights**
↓18% vs same week in 2019
↑21% vs prev week



3. Operated **1 100 flights**
↓17% vs same week in 2019
↑12% vs prev week



1. Operated **2 503 flights**
↑13% vs same week in 2019
↑18% vs prev week



4. Operated **930 flights**
↓41% vs same week in 2019
↑14% vs prev week



5. Operated **870 flights**
↓28% vs same week in 2019
↑3% vs prev week



6. Operated **665 flights**
↓20% vs same week in 2019
↑7% vs prev week



7. Operated **605 flights**
↓35% vs same week in 2019
↑5% vs prev week



8. Operated **561 flights**
↑16% vs same week in 2019
↑28% vs prev week



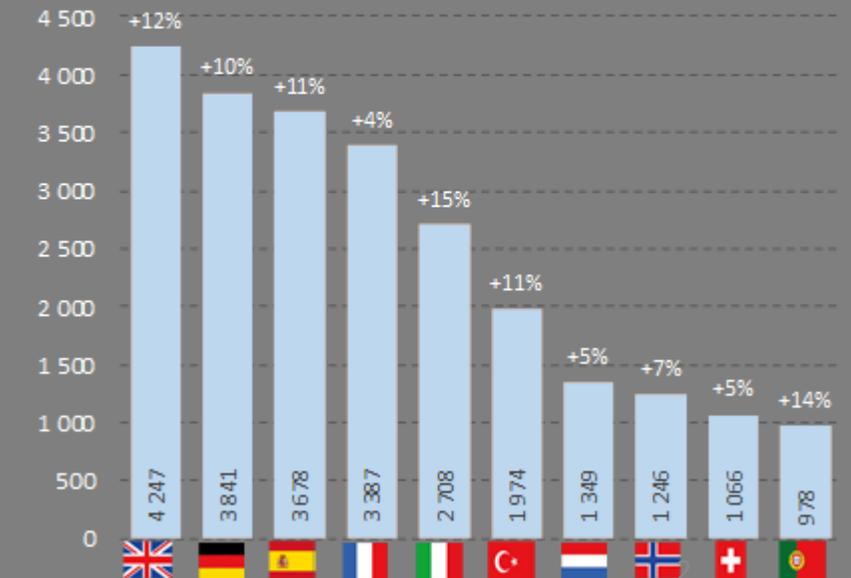
9. Operated **517 flights**
↓42% vs same week in 2019
↑8% vs prev week



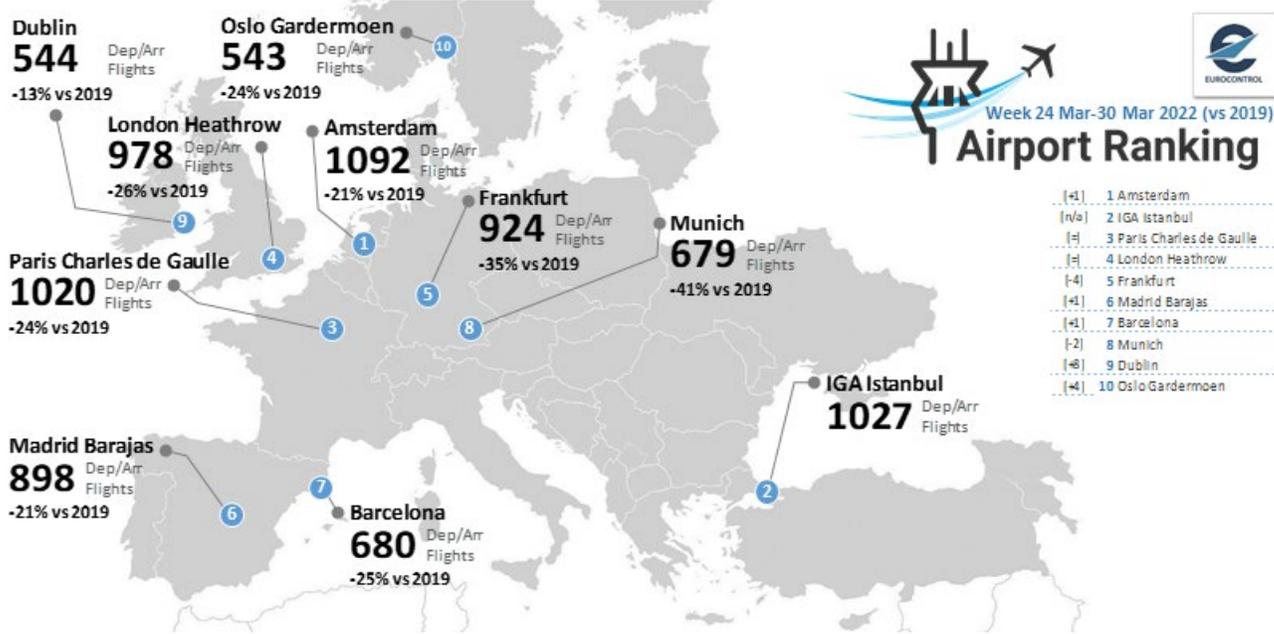
10. Operated **386 flights**
↓31% vs same week in 2019
↑2% vs prev week

Top 10 Busiest States on week 24 - 30 Mar 2022 (avg daily flights)

(Dep/Arr flights and comparison with previous week)

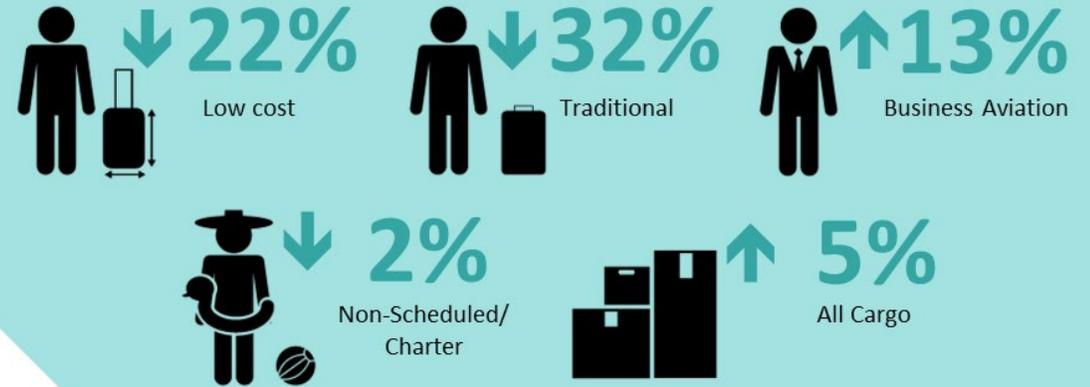


Top 10 Busiest Airports



Market Segments

on week 24 – 30 Mar 2022 (vs 2019)



Traffic Flow

Average daily flights on week of 24 - 30 Mar 2022

	Flights	vs previous week	vs 2019
Intra-European	17 956	+10%	-20%
Intercontinental	3 863	+4%	-33%

Economics

(25 March 2022)

Fuel price

↑390
Cents/gallon

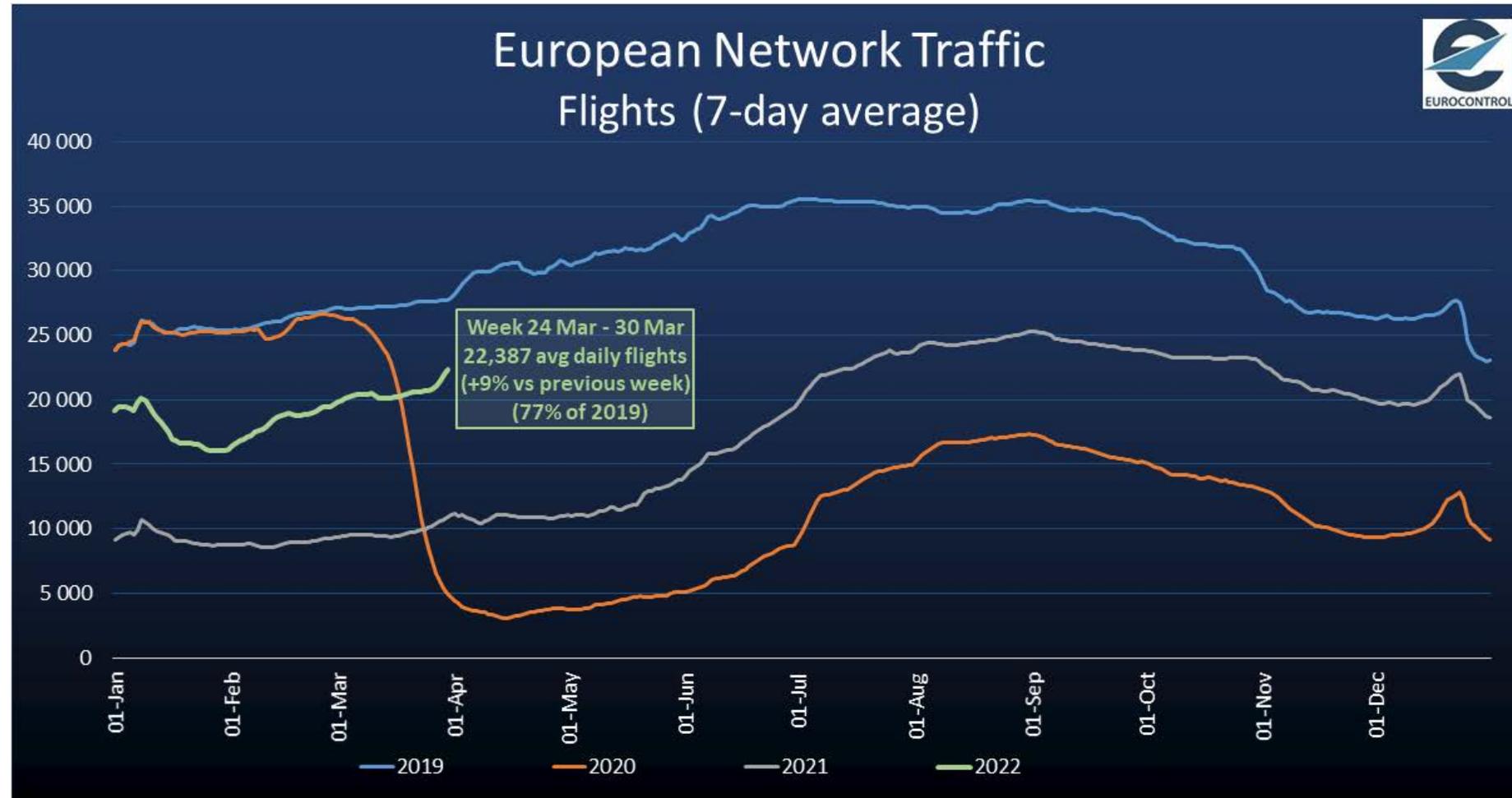
compared to
325 cents/gallon on 11 March 2022

Source: IATA/Platts

Overall traffic situation at network level

On week 24 – 30 March:

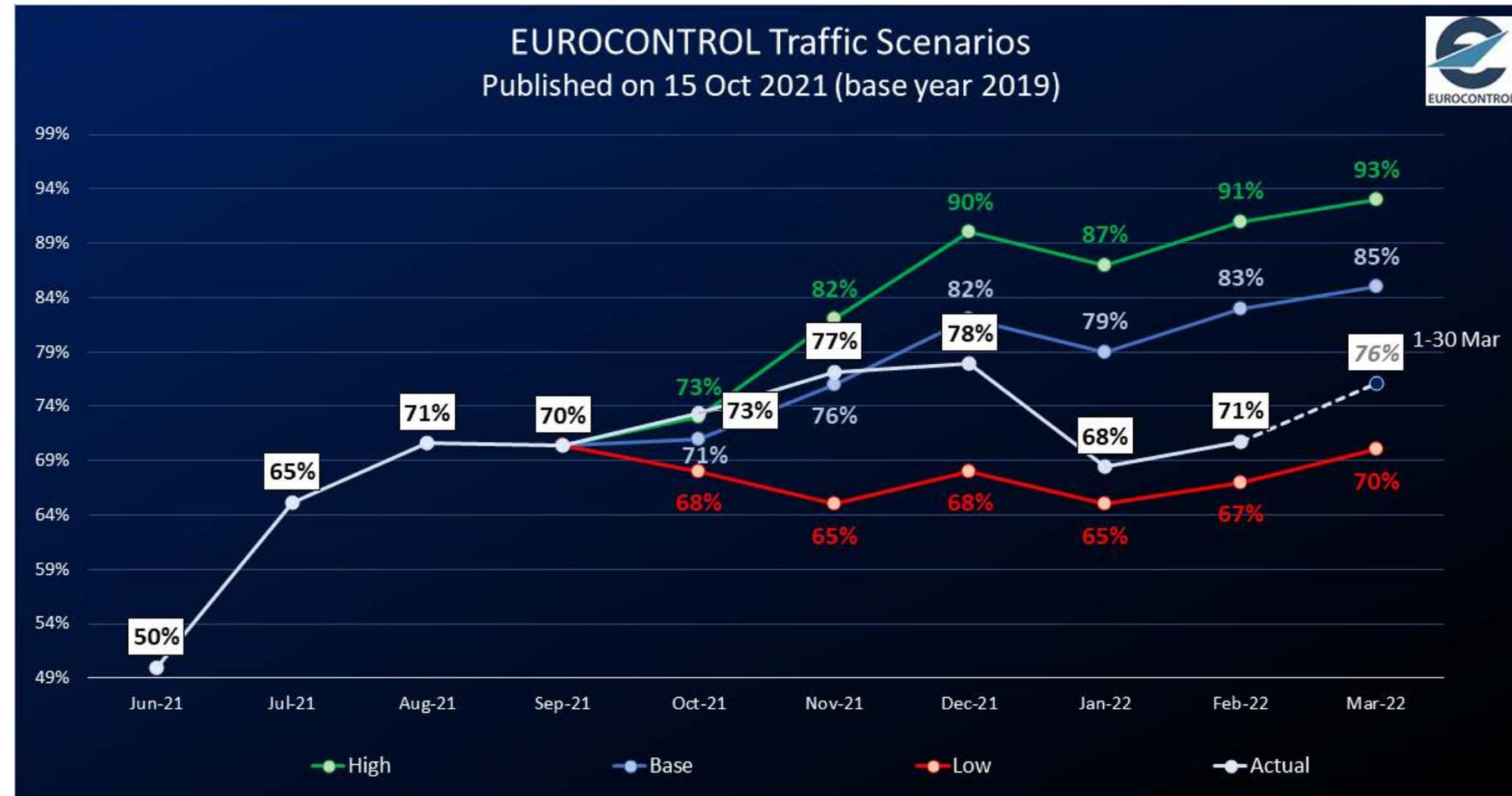
- ✂ **22,387** average daily flights.
- ✂ **+9%** on previous week.
- ✂ **77%** of 2019 traffic levels.
- ✂ Significant increase since the beginning of the Summer schedules on 27 March 2022.



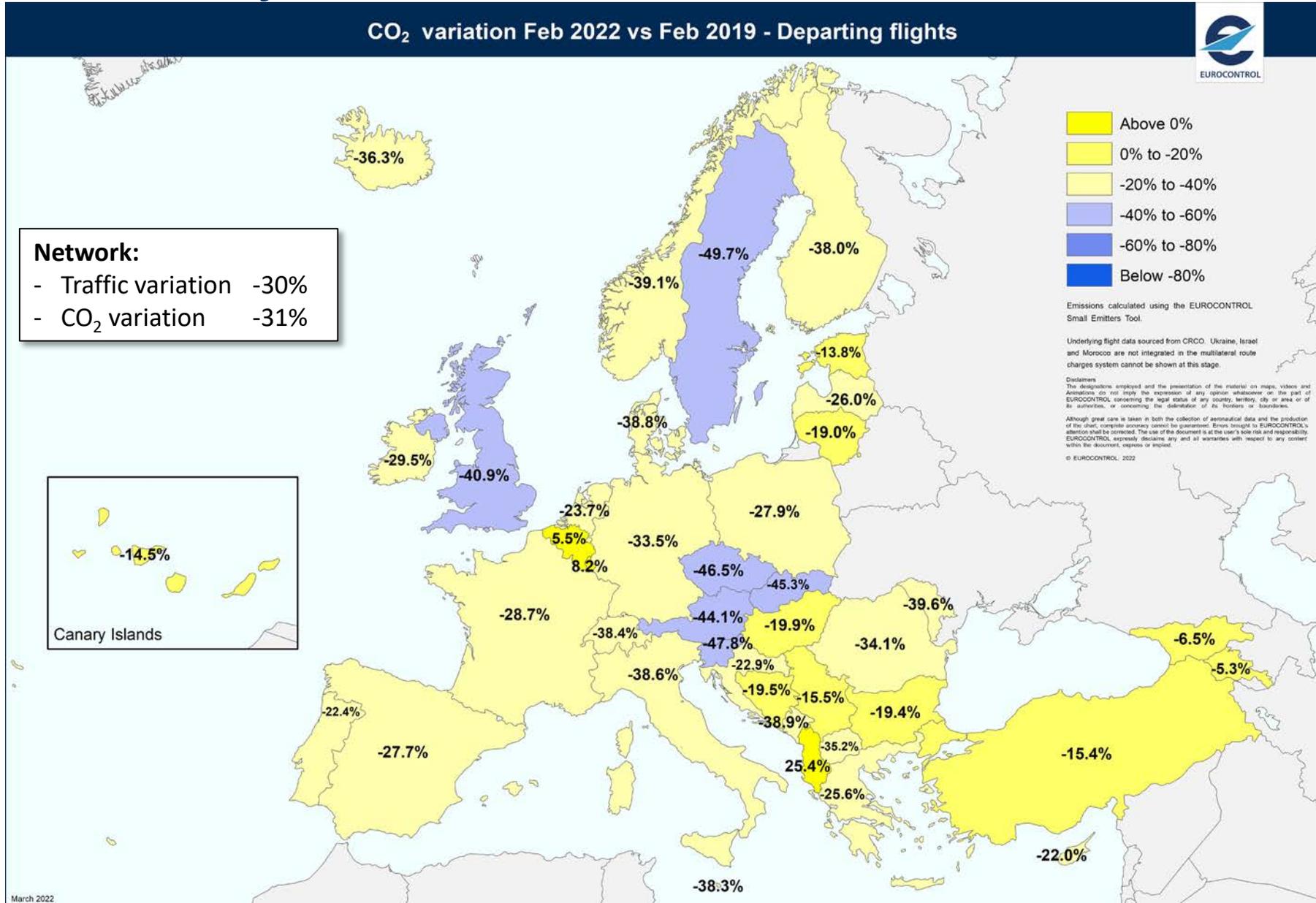
Current situation compared to the latest EUROCONTROL traffic scenarios



- ✘ For the first 30 days of **March**, network traffic is at **76% of 2019** levels.
- ✘ Over the first quarter of 2022, network traffic stands at **72%** of 2019.
- ✘ Network traffic is between the low and medium scenario of the EUROCONTROL traffic scenarios published on 15 October 2021.



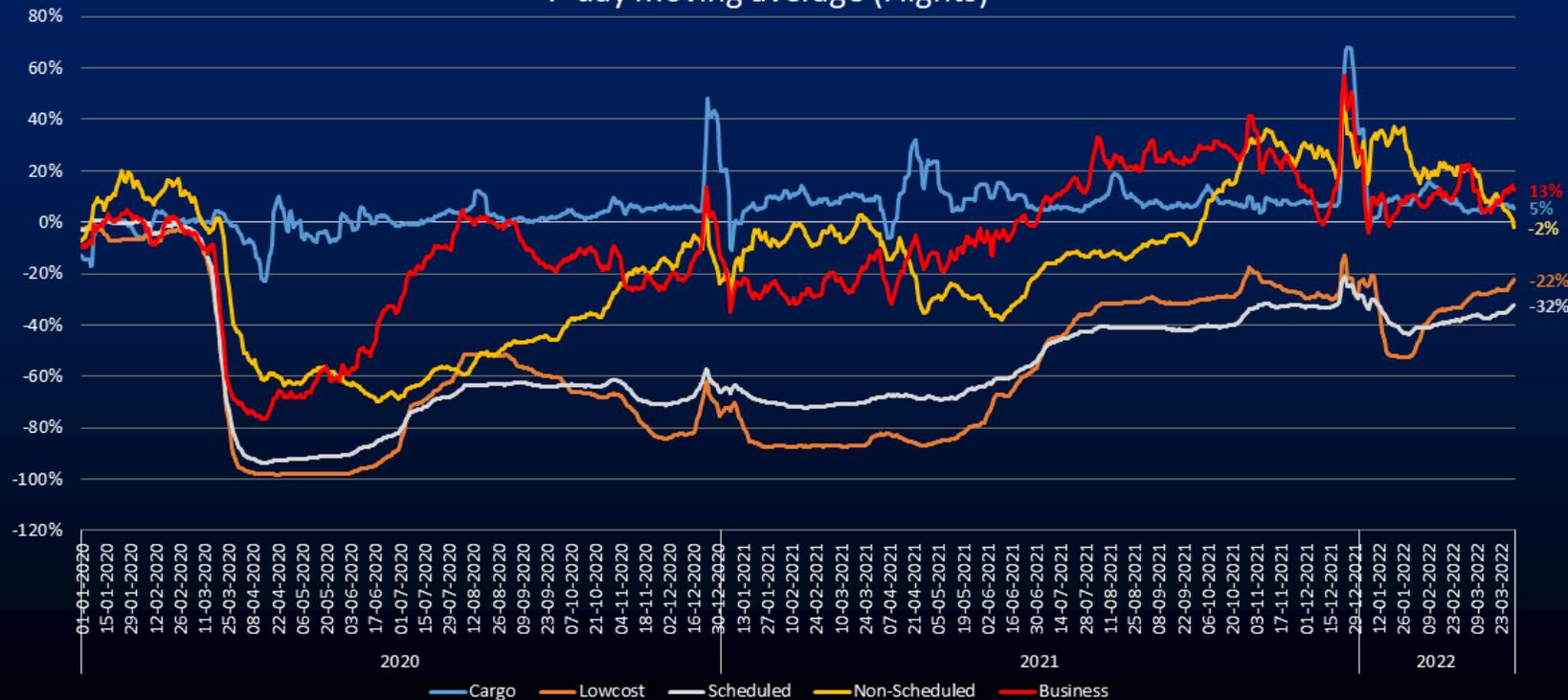
Aviation Sustainability





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:

- ✘ Two segments are above 2019 levels: **All-cargo (+5%)** and **Business Aviation (+11%)**.
- ✘ **Charter (-2%)** saw a decrease since January.
- ✘ **Traditional** slightly increased at **-32%** vs 2019 and **Low-Cost** continues to catch up to **-22%** vs 2019. Low-cost airlines added capacity to the network, notably since the beginning of the Summer schedules on 27 March 2022.

Aircraft operators (Average daily flights for the last week)



Top 10

Top 10 Aircraft Operators	Week (24 - 30 Mar 2022)		
	Average flights per day	% vs 2019	% over previous week
RYANAIR	2 503	+13%	+18%
easyJet	1 383	-18%	+21%
TURKISH AIRLINES	1 100	-17%	+12%
Lufthansa	930	-41%	+14%
AIRFRANCE	870	-28%	+3%
KLM Royal Dutch Airlines	665	-20%	+7%
BRITISH AIRWAYS	605	-35%	+5%
WIZZ	561	+6%	+28%
Scandinavian Airlines	517	-42%	+8%
vueling	386	-31%	+2%

Within the top 10, **all airlines** posted **increases** over the previous week, highest being:

- ✘ **Ryanair** (+380 flights per day on average; +18%) mainly due to flows Spain-UK, domestic Italy, Germany-Spain, Ireland-Spain and Italy-Spain.
- ✘ **easyJet** (+244 flights; +21%) mainly due to flows Spain-UK, Italy-UK, domestic UK, Greece-UK, Netherlands-UK.
- ✘ **Wizz Air** (+122 flights; +28%) mainly due to domestic Italy flows and flows Poland-UK, Italy-Romania, Spain-UK, Romania-UK.
- ✘ **Turkish Airlines** (+120 flights; +12%) mainly owing to Turkish domestic flows, but also flows Turkey-Germany, Italy-Turkey, France-Turkey, Turkey-UK.
- ✘ **Lufthansa** (+112 flights; +14%) mainly due to domestic flows in Germany and flows Germany-Spain, Germany-UK as well as France-Germany.

✘ **Ryanair** is the busiest Aircraft Operator with 2,503 flights per day on average over last week, followed by **easyJet** (1,383), **Turkish Airlines** (1,100), **Lufthansa** (930), **Air France** (870) and **KLM** (665).

Aircraft operators (Average daily flights for the last week)

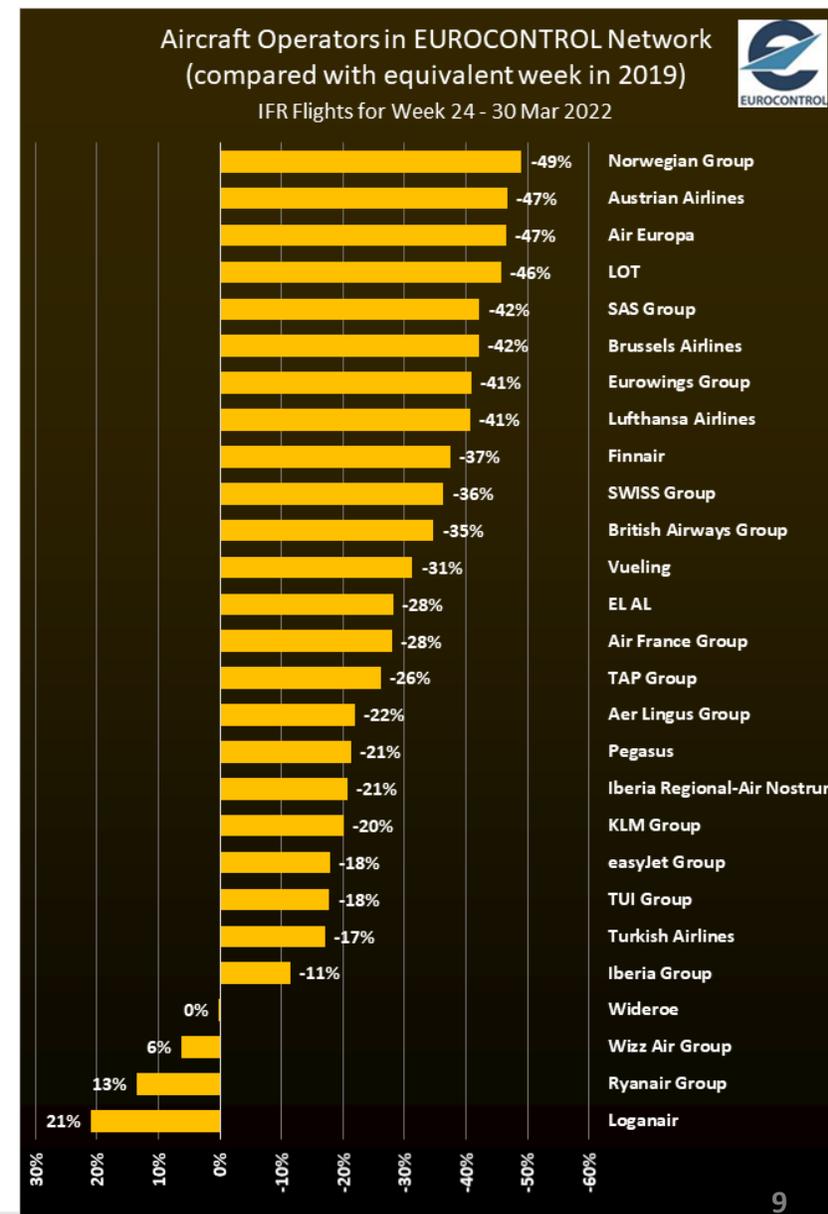


Top 40



✳ Largest increases in flights vs previous week for **Ryanair (+18%)**, **easyJet (+21%)**, **Wizz Air (+28%)**, **Turkish Airlines (+12%)**, **Lufthansa (+14%)** and **Norwegian (+51%)**.

✳ Traffic levels ranging from **-49% (Norwegian)** to **+21% (Loganair)** vs 2019.



Aircraft operators (Average daily flights for the last week)

Cargo, Legacy, Low Cost and Regional Carriers



PERFORMANCE OF MAJOR CARGO CARRIERS

for the week 24 - 30 March 2022



PERFORMANCE OF MAJOR LOW-COST CARRIERS

for the week 24 - 30 March 2022



PERFORMANCE OF MAJOR LONG-HAUL/LEGACY CARRIERS

for the week 24 - 30 March 2022



PERFORMANCE OF MAJOR REGIONAL CARRIERS*

for the week 24 - 30 March 2022



*REGIONAL AIRLINES USING SEPARATE IATA CODES

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



Top 10 States

on week 24 - 30 Mar 2022 (avg daily dep/arr)

2.  3 841 flights
↓31%

vs same week in 2019
↑10% vs prev week

Germany

3.  3 678 flights
↓14%

vs same week in 2019
↑11% vs prev week

Spain

1.  4 247 flights
↓25%

vs same week in 2019
↑12% vs prev week

United Kingdom

4.  3 387 flights
↓19%

vs same week in 2019
↑4% vs prev week

France

5.  2 708 flights
↓18%

vs same week in 2019
↑15% vs prev week

Italy

6.  1 974 flights
↓19%

vs same week in 2019
↑11% vs prev week

Turkey

7.  1 349 flights
↓18%

vs same week in 2019
↑5% vs prev week

Netherlands

8.  1 246 flights
↓13%

vs same week in 2019
↑7% vs prev week

Norway

9.  1 066 flights
↓21%

vs same week in 2019
↑5% vs prev week

Switzerland

10.  978 flights
↓6%

vs same week in 2019
↑14% vs prev week

Portugal

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

✘ **UK** (+464 flights; +12%) mainly owing to easyJet and Ryanair. Mainly flows with Spain and Italy and domestic flows.

✘ **Spain** (+372 flights; +11%) mainly due to Ryanair and easyJet as well as light AOs. Flows with UK, domestic flows as well as flows with Germany and Italy.

✘ **Italy** (+346 flights; +15%) mainly due to Ryanair, easyJet and ITA Airways. Mainly on domestic flows, and flows with Germany, UK, Spain and France.

✘ **Germany** (+342 flights; +10%) mainly due to Lufthansa, Eurowings, Ryanair and easyJet. Domestic flows as well as flows with Spain, Italy, Turkey and UK.

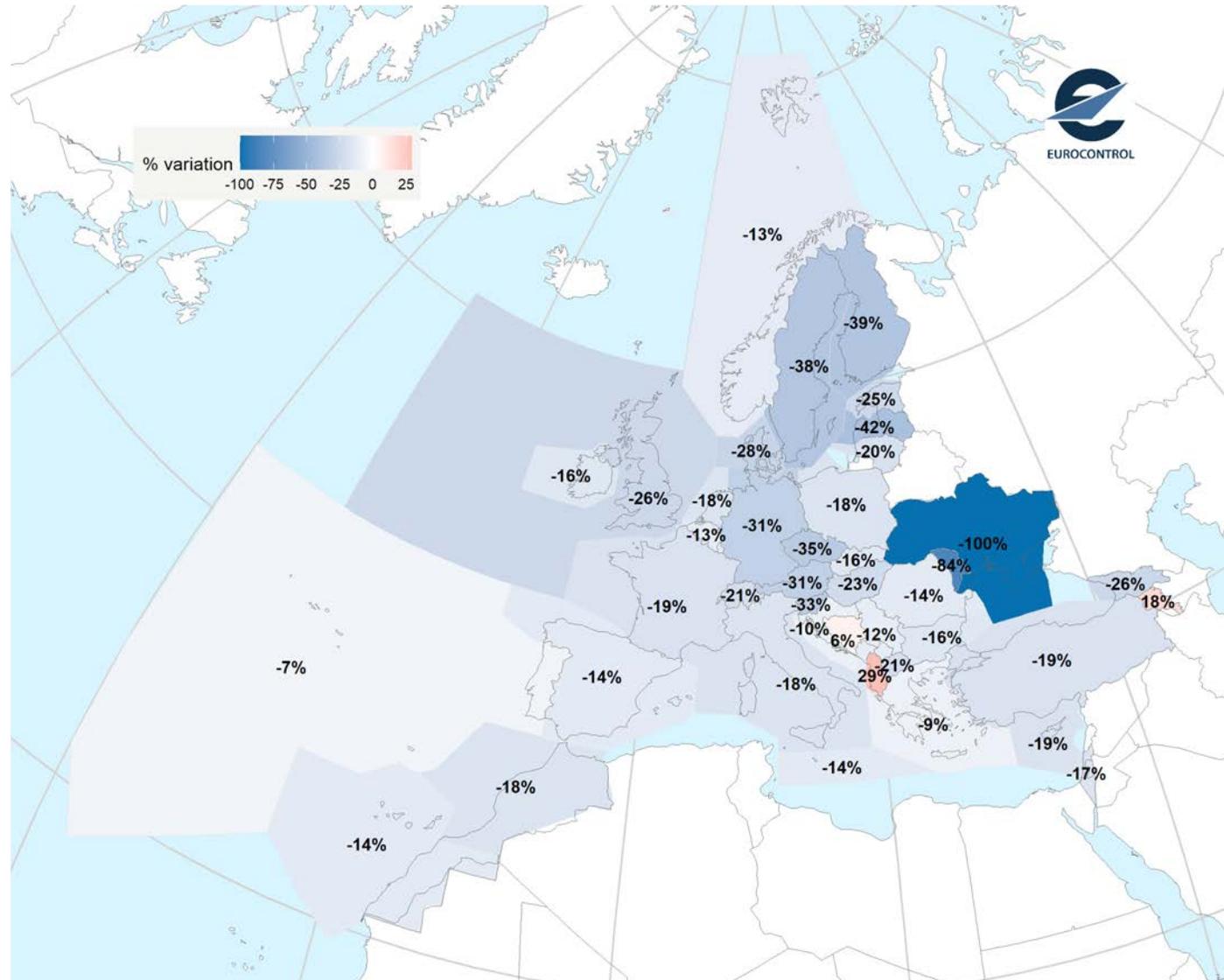
✘ **UK** is the State with the highest number of dep/arr flights on average over last week (4,247) followed by **Germany** (3,841), **Spain** (3,678), **France** (3,387) and **Italy** (2,708).

✘ Comparing with previous week, the ranking improved for UYK, Spain and Portugal.

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

State FIR daily % arrivals/departures variation vs 2019 on 2022-03-29

7-day average - FIRs at altitude FL200



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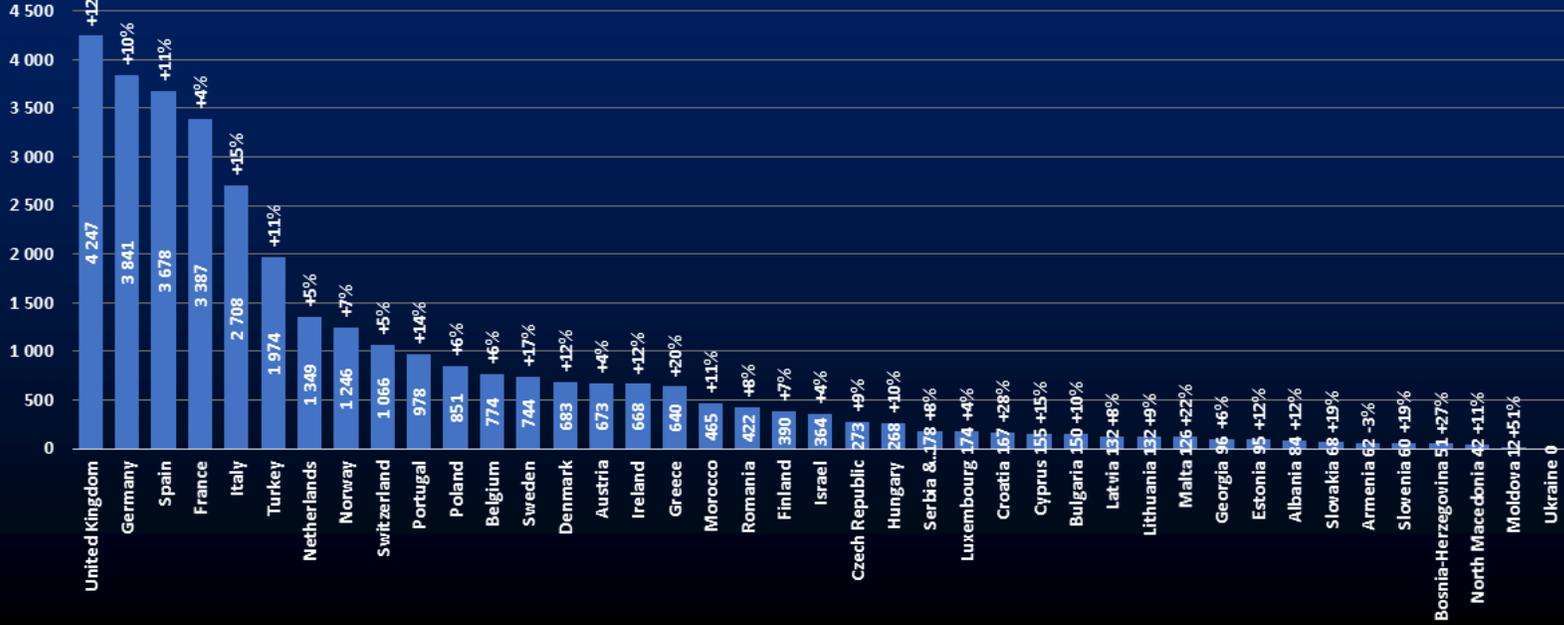
States (Average Daily Departure/Arrival flights for the last week)

Top 40



States (Dep/Arr flights)

Average daily flights for week 24 - 30 Mar 2022 and comparison with previous week

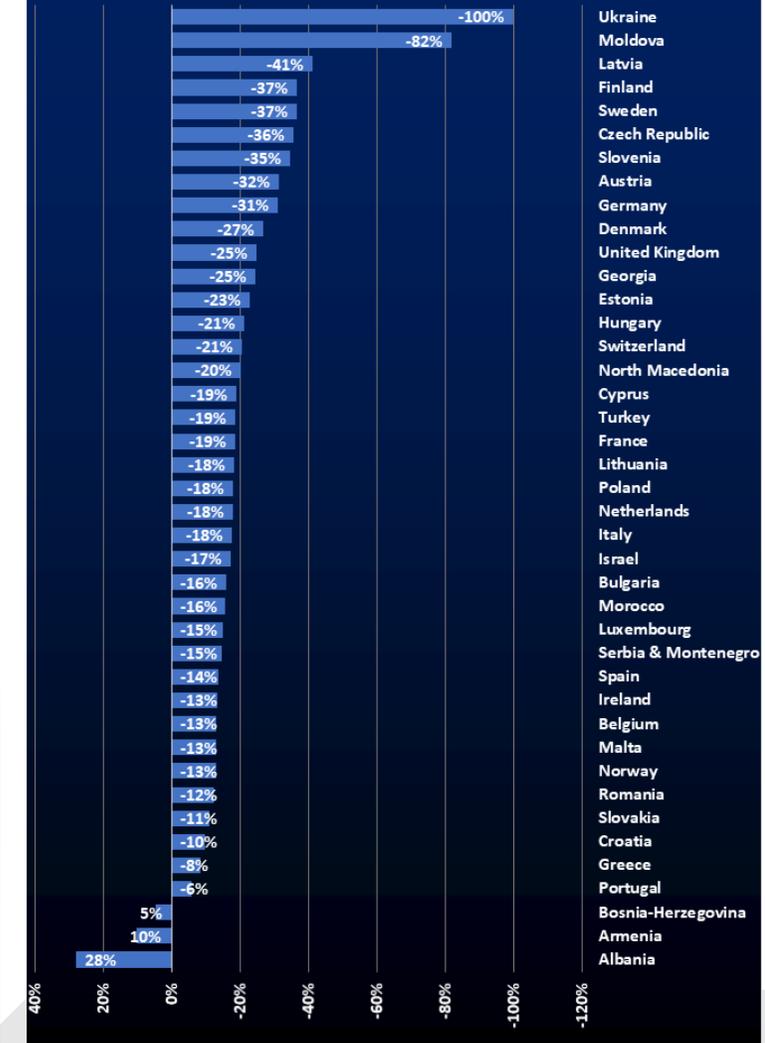


✂ Highest increases in flights vs previous week for **UK (+12%)**, **Spain (+11%)**, **Italy (+15%)**, **Germany (+10%)**, **Turkey (+11%)**, **France(+4%)**, **Portugal (+14%)**, **Sweden (+17%)** and **Greece (+20%)**.

✂ Traffic levels ranging from -100% (**Ukraine**) and -82% (**Moldova**) to +28% (**Albania**), compared to 2019.

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

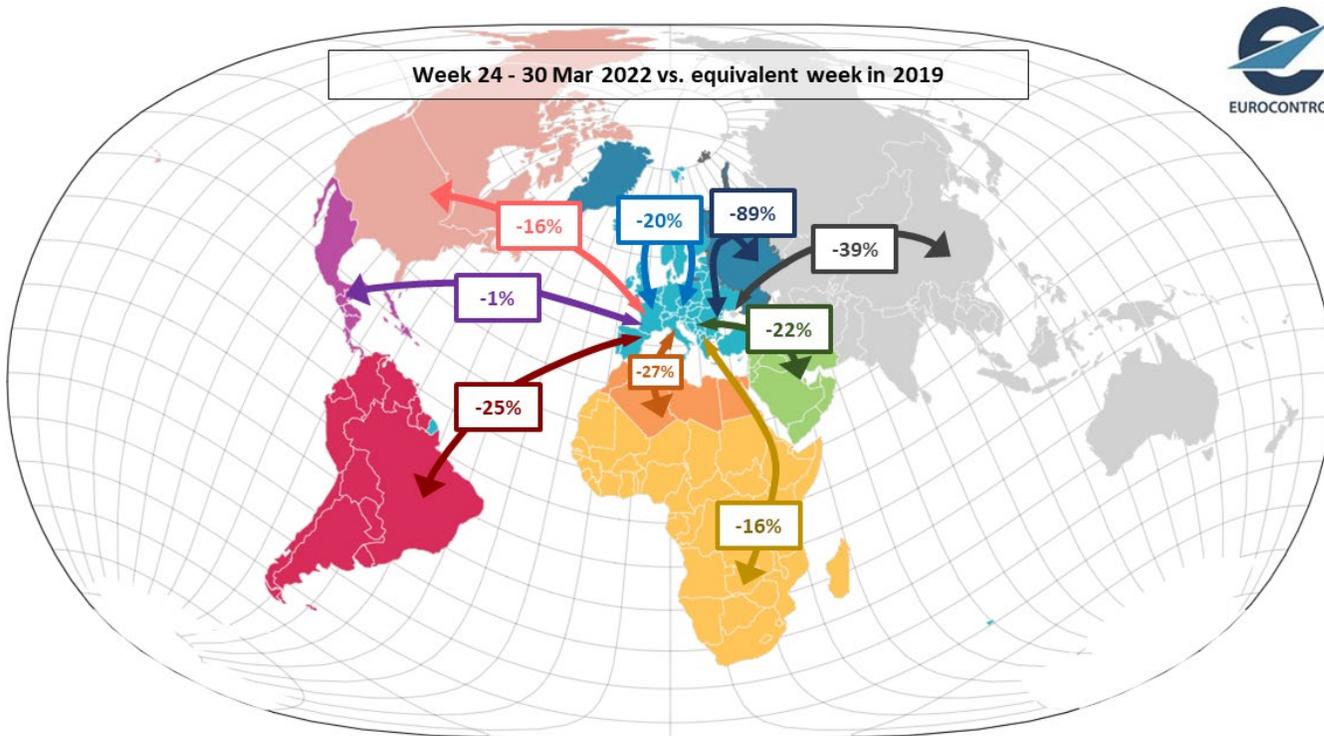
IFR Dep/Arr Flights for Week 24 - 30 Mar 2022



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

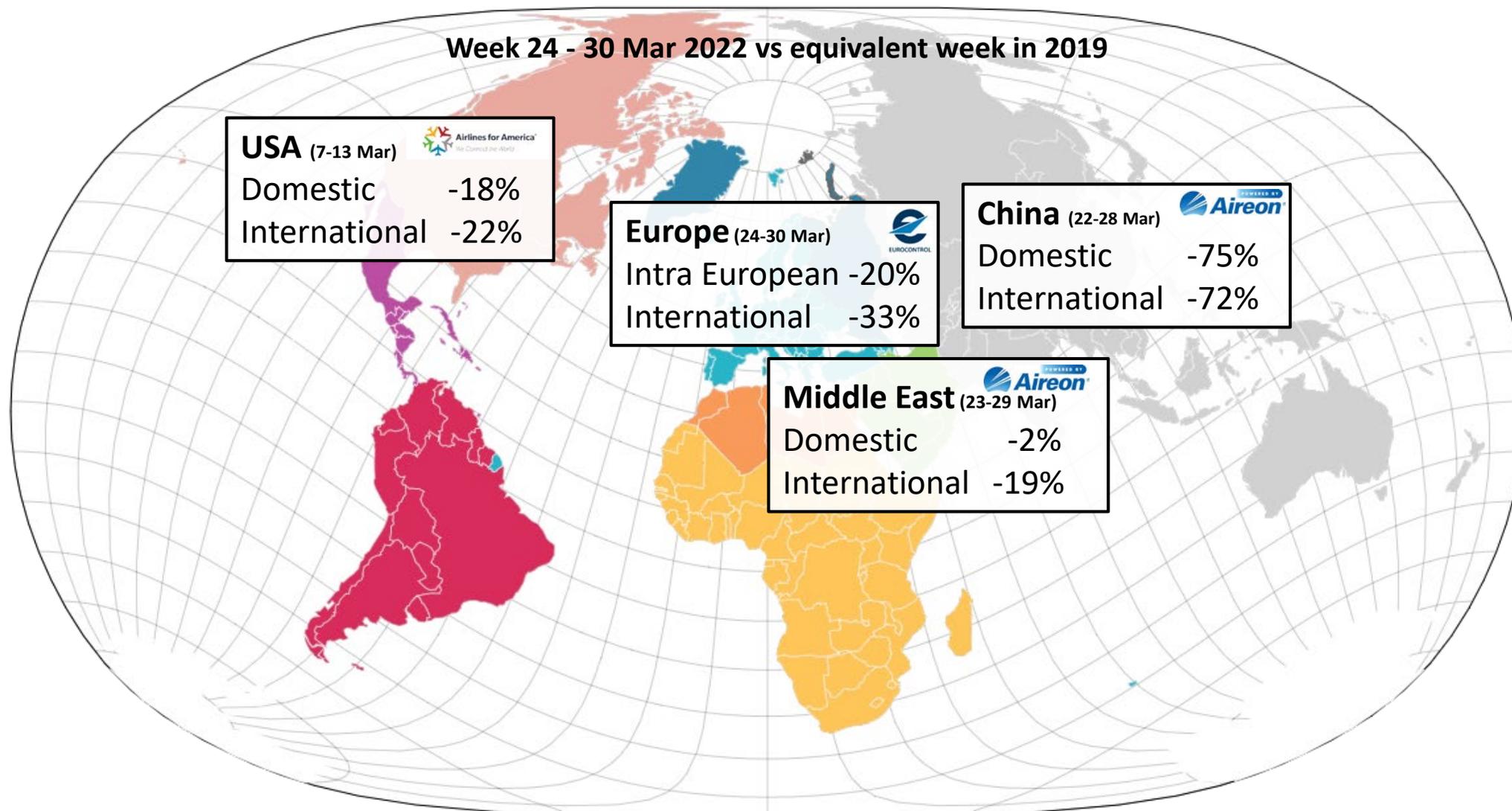


- ✘ The main traffic flow is the intra-Europe flow with 17,956 flights on average the most recent week, increasing by 10% over the previous week.
- ✘ Significant reduction over one week for the flow between Europe and Other Europe (incl. Russia) with -43% over the previous week (and -89% compared to 2019).
- ✘ Important lockdown in Shanghai, owing to a surge in COVID-19 cases is affecting Chinese domestic flows (next slide).
- ✘ Intra-Europe flights are at -20% compared to 2019 while intercontinental flows are at -33%.



REGION (Average daily flights)	Week 17/03/2022 - 23/03/2022	Week 24/03/2022 - 30/03/2022	%	vs. 2019
Intra-Europe	16 360	17 956	+10%	-20%
Europe<->Asia/Pacific	497	486	-2%	-39%
Europe<->Mid-Atlantic	182	178	-2%	-1%
Europe<->Middle-East	1 063	1 095	+3%	-22%
Europe<->North Atlantic	819	892	+9%	-16%
Europe<->North-Africa	662	722	+9%	-27%
Europe<->Other Europe	97	94	-3%	-89%
Europe<->South-Atlantic	127	133	+5%	-25%
Europe<->Southern Africa	265	262	-1%	-16%
Non Intra-Europe	3 710	3 863	+4%	-33%

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 - 30 Mar 2022				
	Airport-Pair	Avg daily flights	Δ vs prev. week	% vs prev. week	% vs 2019
→	London/Heathrow <-> New York JFK	30	↗ +4	+14%	↘ -22%
→	London/Heathrow <-> Dubai	17	→ +0	+3%	↘ -10%
→	Paris/Charles-De-Gaulle <-> New York JFK	16	→ +1	+6%	↗ +11%
→	Frankfurt <-> Seoul/Inchon INTL	14	↗ +2	+14%	↗ +52%
↗	London/Heathrow <-> Los Angeles	12	↗ +2	+23%	↘ -28%
↘	Paris/Charles-De-Gaulle <-> Dubai	12	→ +0	+0%	↗ +16%
↗	London/Heathrow <-> Chicago O Hare Intl	11	↗ +3	+32%	↘ -33%
↗	Madrid/Barajas <-> Bogota Intl/Eldorado	11	↗ +1	+13%	↗ +17%
↗	London/Heathrow <-> Newark	11	↗ +1	+13%	↘ -29%
↘	Frankfurt <-> Chicago O Hare Intl	11	→ +0	+4%	↘ -1%
↘	London/Heathrow <-> Washington	11	→ +1	+9%	↘ -16%
↘	London/Heathrow <-> Hamad INTL	10	→ -0	-3%	↘ -30%
↗	London/Heathrow <-> San Francisco	10	↗ +2	+23%	↘ -16%
↗	London/Heathrow <-> Boston	9	→ +1	+8%	↘ -21%
↘	Milan/Malpensa <-> New York JFK	9	→ -0	-3%	↘ -7%
↘	Paris/Charles-De-Gaulle <-> Hamad INTL	9	→ +0	+0%	↗ +38%
↗	Madrid/Barajas <-> Mexico City	8	→ +0	+5%	↗ +11%
↗	Amsterdam <-> New York JFK	8	↗ +1	+18%	↘ -20%
↗	London/Heathrow <-> Miami Intl/Florida	8	→ +0	+2%	↘ -27%
↘	Paris/Charles-De-Gaulle <-> Atlanta Intl/Hart	8	→ +0	+0%	→ +0%

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

Increases for:

- ✂ London Heathrow – New York JFK (+4 flights)
- ✂ London Heathrow – Chicago (+3 flights)
- ✂ London Heathrow – San Francisco (+2 flights)
- ✂ London Heathrow – Los Angeles (+2 flights)
- ✂ Frankfurt – Seoul/Inchon (+2 flights)

Country pairs (Average Daily flights for the last week)

Top 10



Rank evolution over prev. week	Top 10 Country-Pair on week 24 - 30 Mar 2022				
	Country-Pair	Avg daily flights	Δ vs prev. week	% vs prev. week	% vs 2019
→	Spain <-> Spain	1 046	↗ +52	+5%	↘ -11%
→	France <-> France	941	↘ -4	-0%	↘ -16%
→	Norway <-> Norway	789	↗ +31	+4%	↘ -2%
→	United Kingdom <-> United Kingdom	740	↗ +17	+2%	↘ -28%
→	Italy <-> Italy	733	↗ +74	+11%	↘ -4%
→	Turkey <-> Turkey	713	↗ +78	+12%	↘ -26%
→	Germany <-> Germany	629	↗ +50	+9%	↘ -38%
→	Spain <-> United Kingdom	556	↗ +114	+26%	↘ -17%
→	Germany <-> Spain	409	↗ +46	+13%	↘ -17%
→	France <-> United Kingdom	275	↗ +10	+4%	↘ -30%

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

- ✘ **Spain-UK** (+114 flights; +26%) mainly due to Ryanair, easyJet and Wizz Air.
- ✘ **Turkey-Turkey** (+78 flights; +12%) mainly due to Turkish Airlines, Pegasus.
- ✘ **Italy-Italy** (+74 flights; +11%) mainly due to Ryanair, ITA Airways and easyJet.
- ✘ **Spain-Spain** (+52 flights; +5%) mainly due to light aircraft operators, Ryanair and Vueling.
- ✘ **Germany-Germany** (+50 flights; +9%) mainly due to Lufthansa, light aircraft operators and Eurowings.

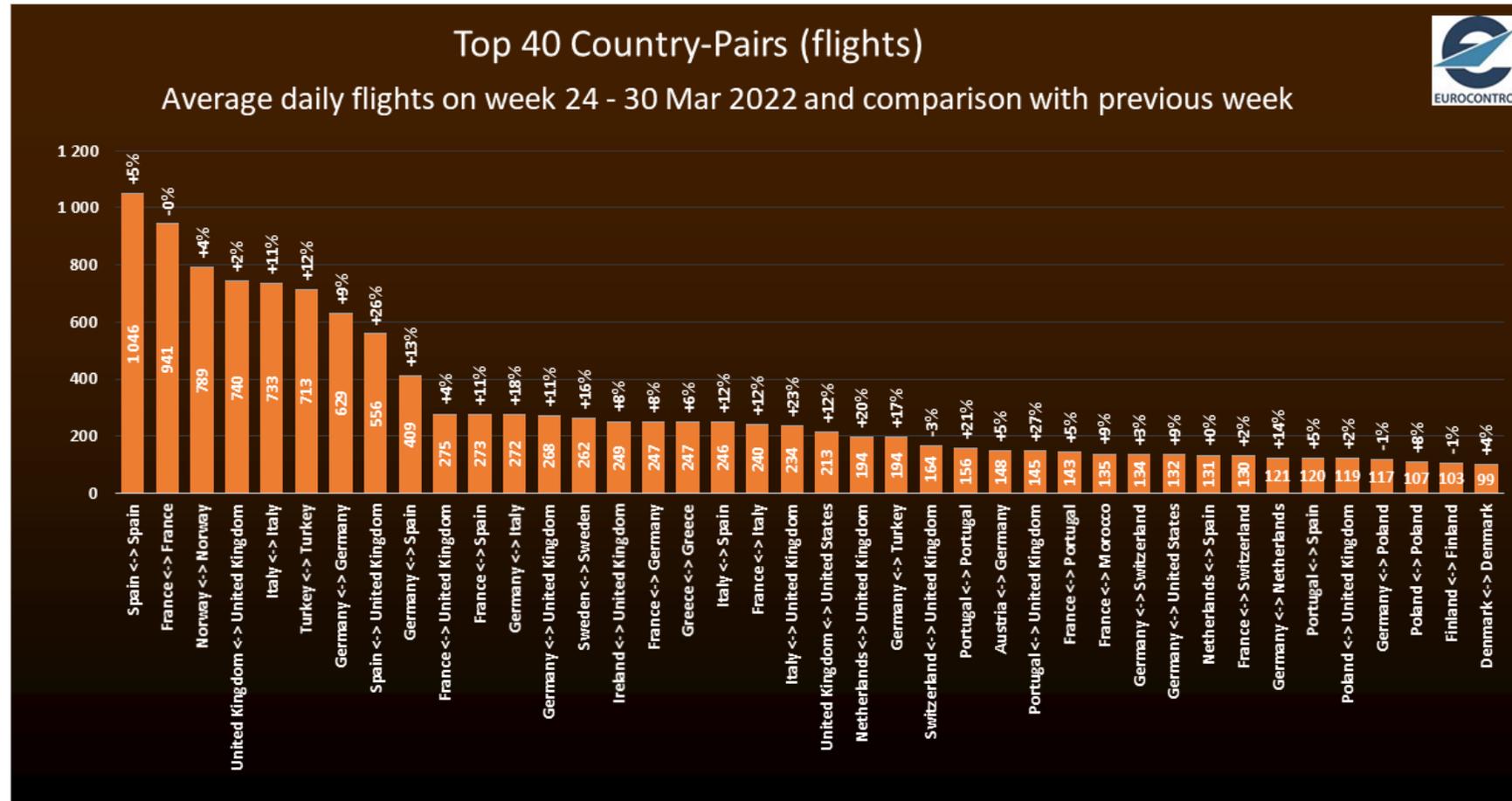
Seven of the top 10 flows are domestic.

✘ **Spain-Spain** is the country-pair with the highest number of dep/arr flights (1,046) followed by **France-France** (941), **Norway-Norway** (789), **UK-UK** (740), **Italy-Italy** (733), **Turkey-Turkey** (713) and **Germany-Germany** (629).

✘ Compared to the previous week, the ranking is unchanged.

Country pairs (Average Daily flights for the last week)

Top 40



✘ Highest increase in flights vs previous week for **Spain-UK (+26%)**, **Turkey-Turkey (+12%)**, **Italy-Italy (+11%)**, **Spain-Spain (+5%)**, **Germany-Germany (+11%)**, **Germany-Spain (+13%)**, **Italy-UK (+23%)** and **Germany-Italy (+18%)**.

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



Top 10

Rank evolution over prev. Week	Top 10 Airports on week 24 Mar - 30 Mar 2022				
	Airport	Average Daily Dep/Arr Flights	Δ over prev. week	% over prev. week	% vs 2019
→	Amsterdam	1 092	↗ +65	+6%	↘ -21%
↗	IGA Istanbul Airport	1 027	↗ +97	+10%	↗ N/A
↘	Paris/Charles-De-Gaulle	1 020	↗ +56	+6%	↘ -24%
→	London/Heathrow	978	↗ +69	+8%	↘ -26%
→	Frankfurt	924	↗ +67	+8%	↘ -35%
→	Madrid/Barajas	898	↗ +51	+6%	↘ -21%
→	Barcelona	680	↗ +39	+6%	↘ -25%
→	Munich	679	↗ +89	+15%	↘ -41%
→	Dublin	544	↗ +56	+11%	↘ -13%
↗	Oslo/Gardermoen	543	↗ +60	+12%	↘ -24%

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

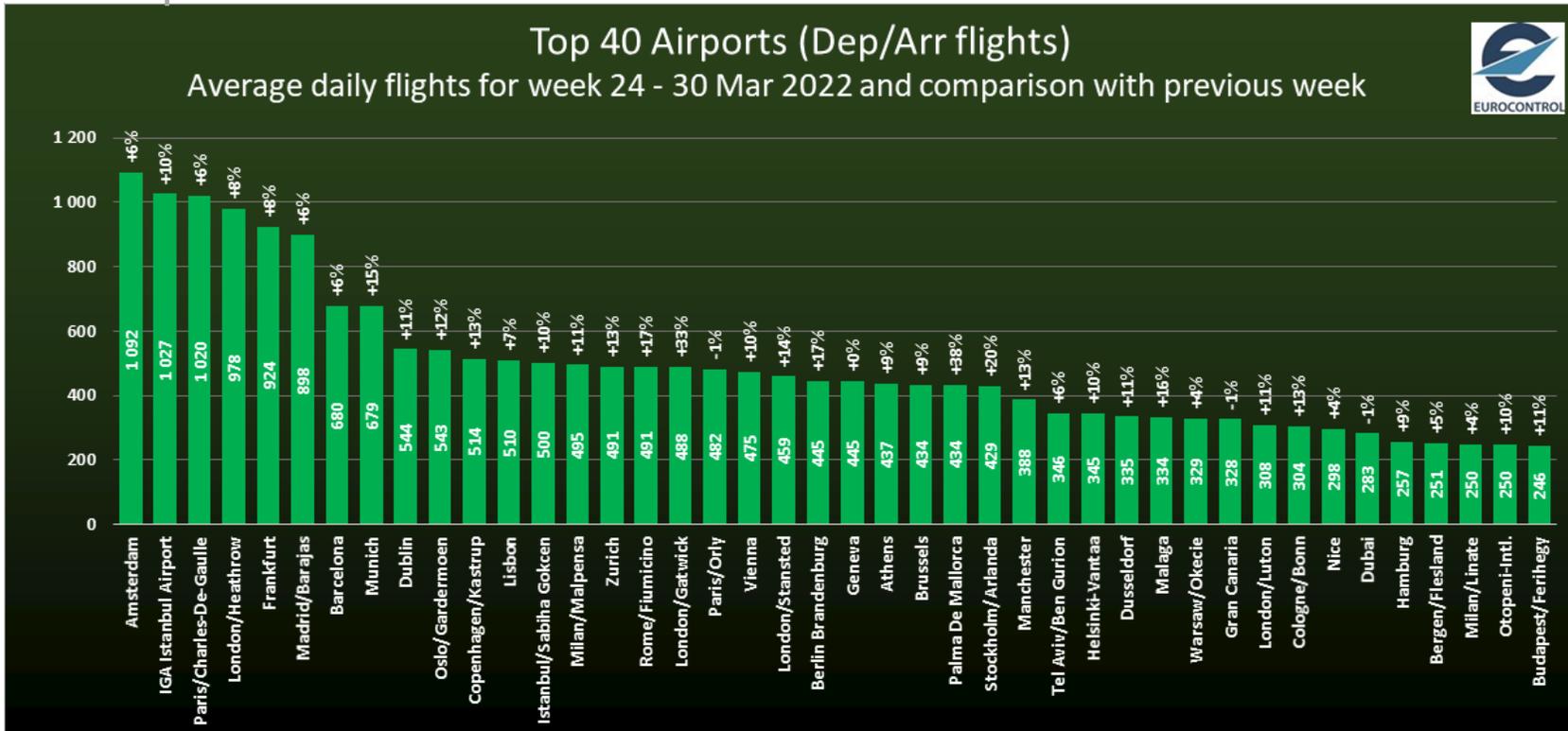
- ✘ **Istanbul IGA** (+97 flights; +10%) mainly due to Turkish Airlines on domestic flows and flows with Germany.
- ✘ **Munich** (+89 flights; +15%) mainly due to Lufthansa. Mainly on domestic flows and flows with Italy, France and UK.
- ✘ **London Heathrow** (+69 flights; +8%) mainly due to British Airways, Aer Lingus and American Airlines. Flows with US, Germany, Italy and Ireland.
- ✘ **Frankfurt** (+67 flights; +8%) mainly due to Lufthansa. Domestic flows and flows with UK, Italy and Spain.

✘ **Amsterdam** is the airport with the highest number of dep/arr flights (1,092) followed by **IGA Istanbul** (1,027), **Paris CDG** (1,020), **London Heathrow** (978) and **Frankfurt** (924).

✘ **IGA Istanbul** and **Oslo** increased their rankings compared to previous week while **Paris/CDG** decreased its ranking.

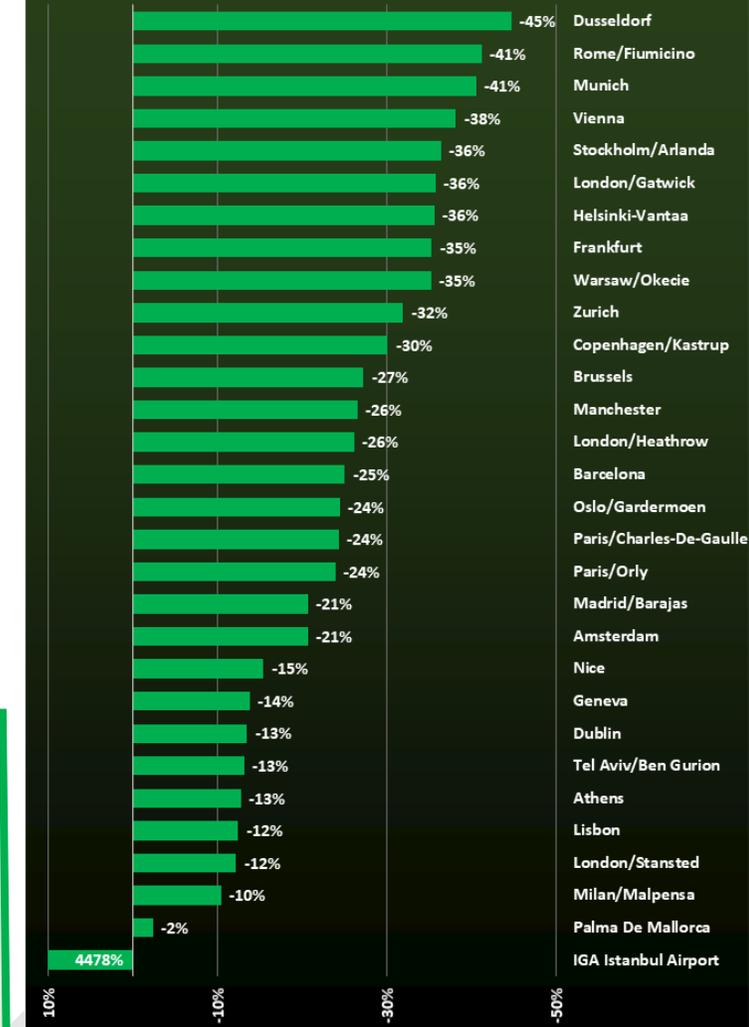
Airports (Average Daily Departure/Arrival flights for the last week)

Top 40



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

IFR Dep/Arr Flights for Week 24 - 30 Mar 2022



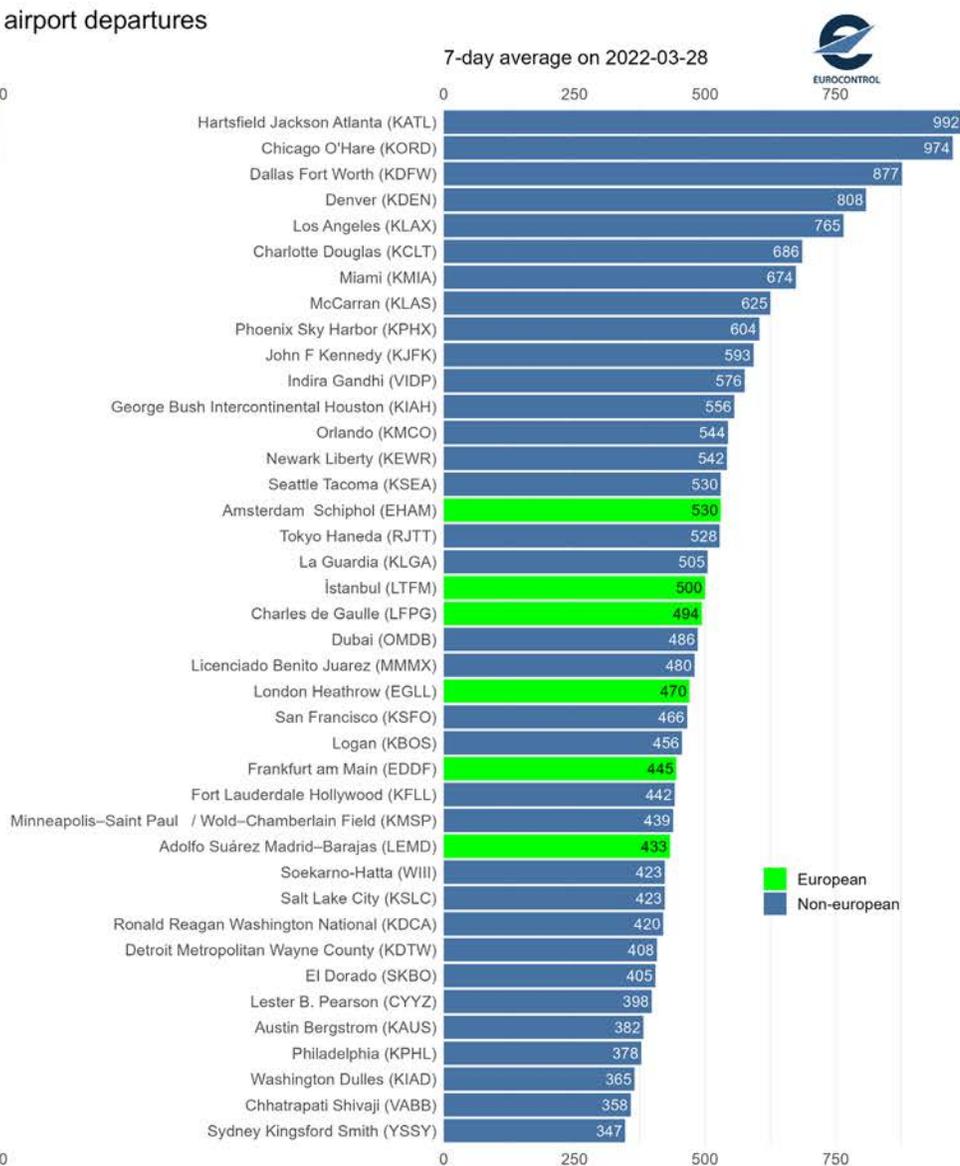
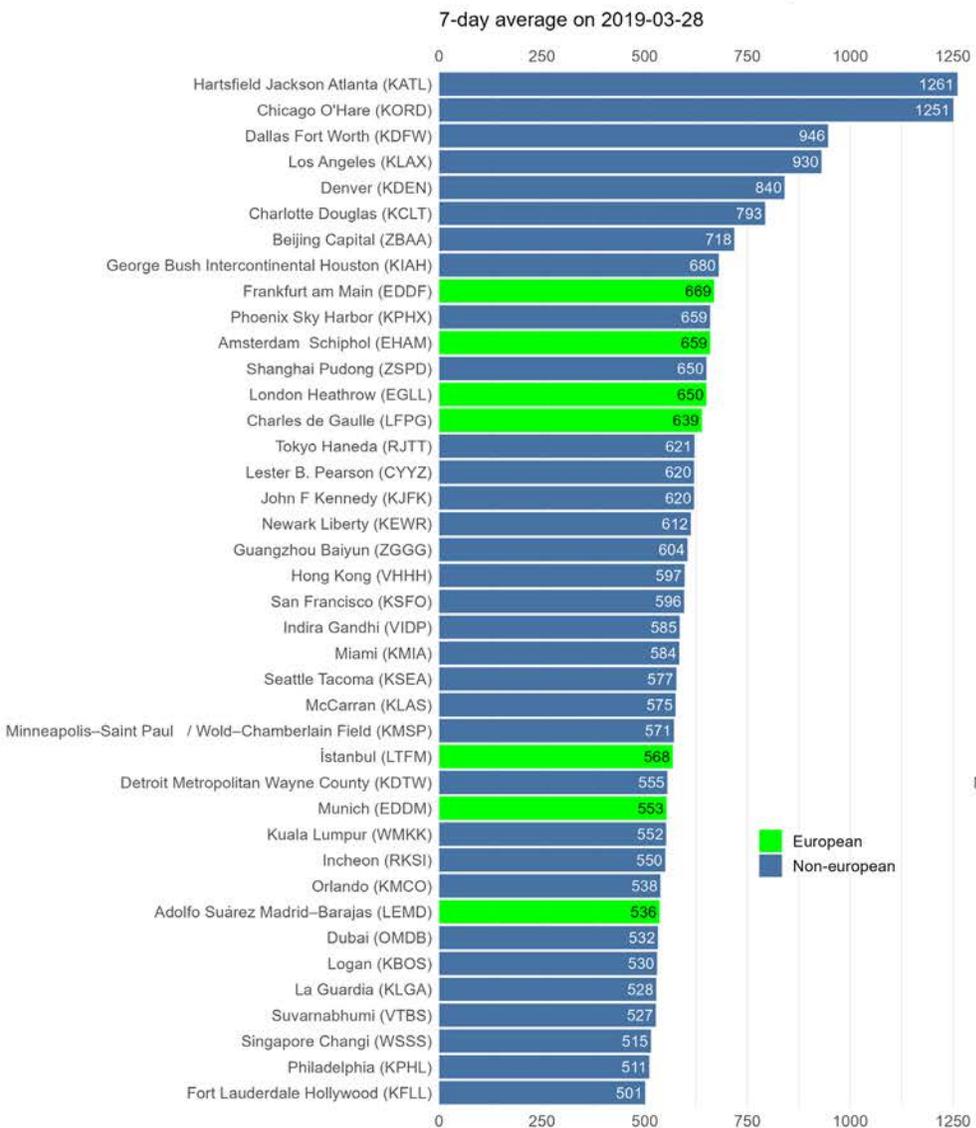
✘ Highest increases in flights vs the previous week for **London/Gatwick (+33%)**, **Palma (+38%)**, **IGA Istanbul (+10%)**, **Munich (+15%)**, **Rome/Fiumicino (+17%)** and **Stockholm (+20%)**.

✘ Traffic levels ranging from -45% (Dusseldorf) to -2% (Palma), 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)



Top 40 worldwide airport departures



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

✘ Six European airports are ranked in the top 40 global airports, with three: Amsterdam, Istanbul IGA and Paris CDG in the top 20 (vs four in 2019).

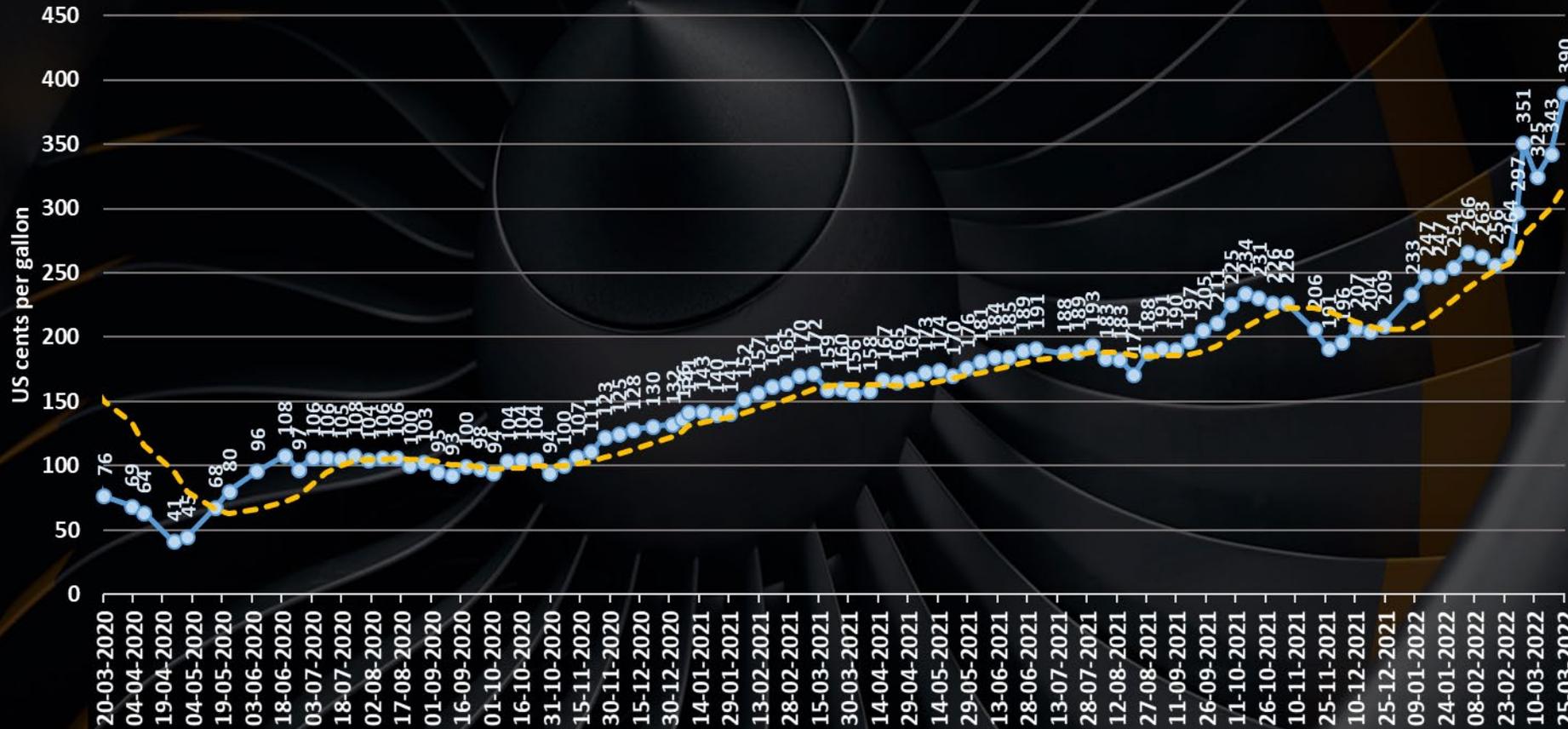
✘ The top 10 global airports are currently all based in the US.

✘ The first Asian airport is currently Tokyo (17th); where it used to be Beijing (7th in 2019).

Source: Flightradar24 Historical Global Utilisation data

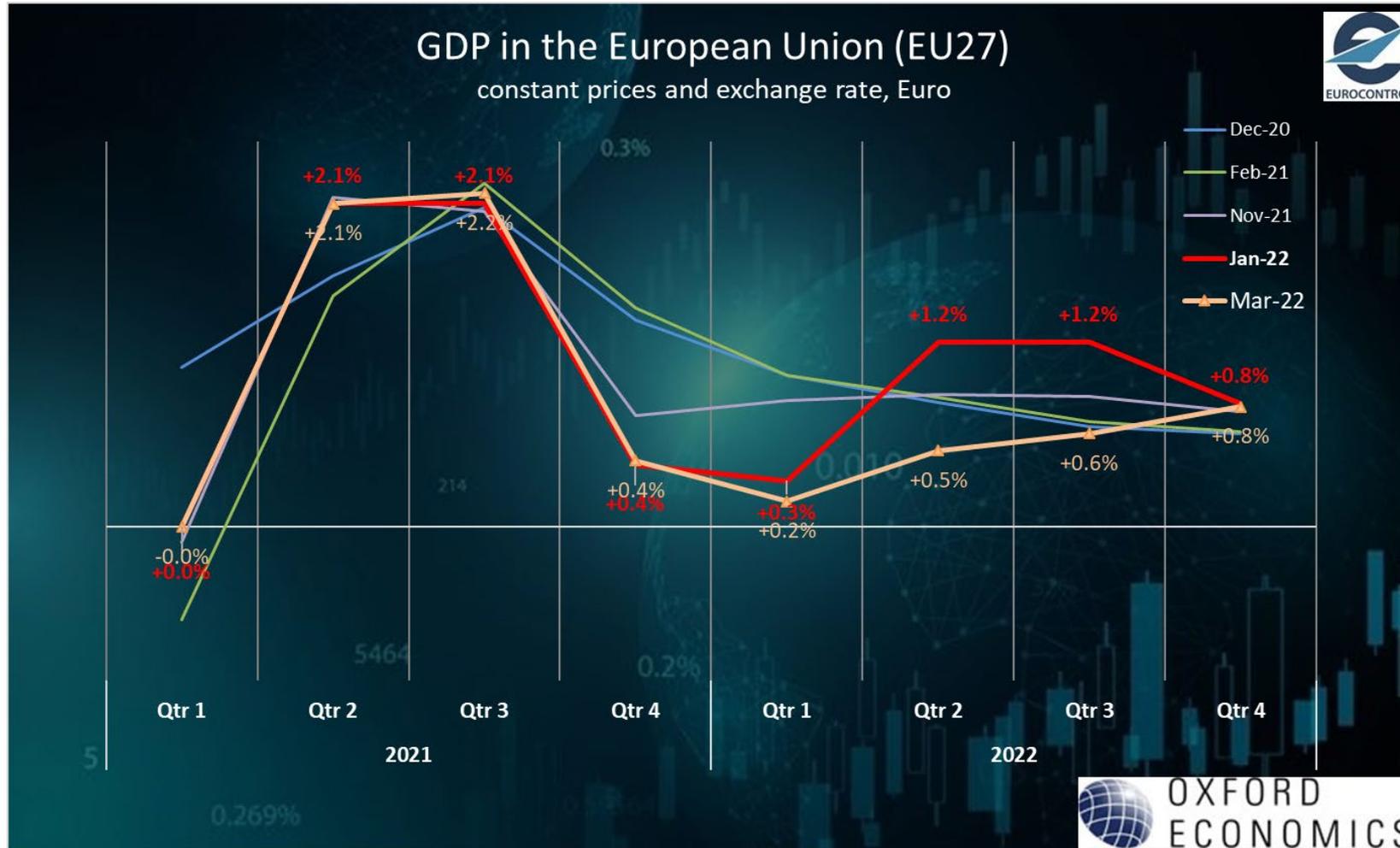


Jet Fuel Price Europe



Source: IATA/Platts

- ✘ Jet fuel prices have risen to 390 cts/gallon on 25 March (+14% compared to previous week) and remain highly volatile.
- ✘ Prices increased by 48% vs one month ago.



✘ Due to Russia's invasion of Ukraine, Oxford Economics **GDP growth forecasts** for 2022 Q2 and 2022Q3 are **revised downward** (-0.7pp and -0.6pp respectively compared to Jan22 forecast), a combination of **higher-for-longer inflation** and lower growth, mainly via **more-subdued consumption**.

✘ For 2022, **EU27 GDP** is expected to record a **3%** growth in the base scenario. Uncertainty remains very high, with risks skewed to the downside.

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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