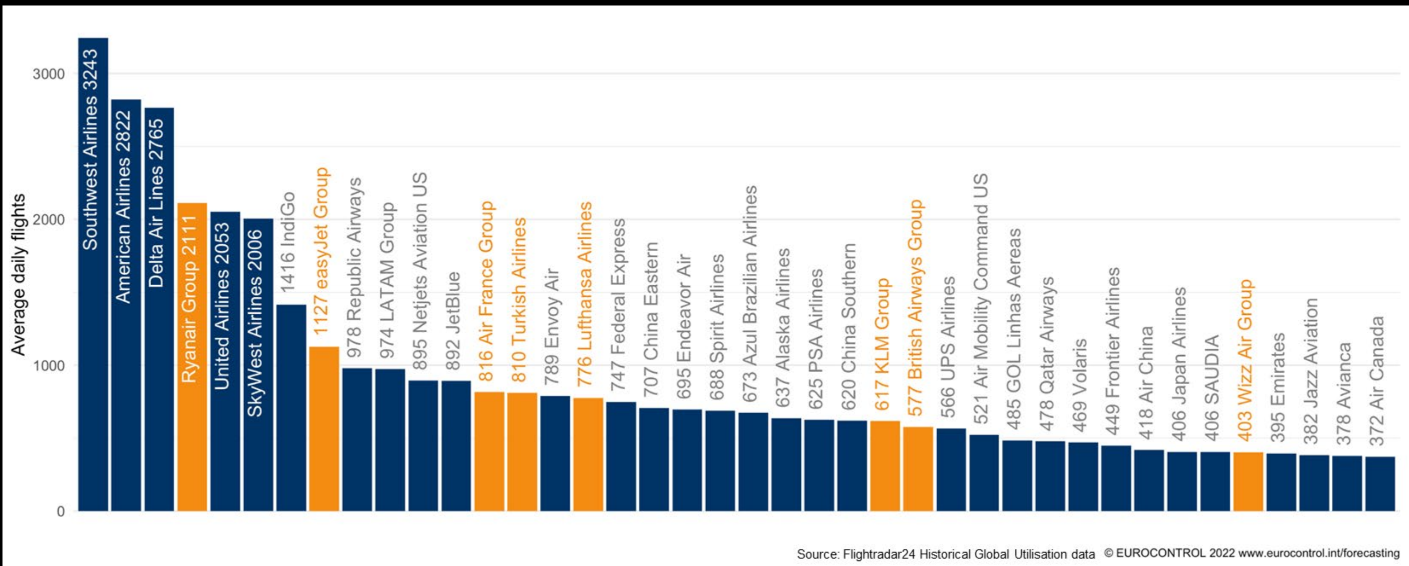
EUROCONTROL Data Snapshot

An eighth European airline has joined the global top 40.

16 March 2022



Taken together as a group, the low-cost airlines in Europe have had a similar pandemic to the traditional scheduled operators. In our last Comprehensive Assessment we reported that low-cost flights stood at 32% below 2019, while traditional scheduled were not much lower, at 37% below.

Individual airline groups, however, have fared very differently to the segment as a whole. Early in 2022, Wizz Air Group was operating more than 20% more flights than at the same point in 2019. That rate of recovery was beaten by only a few European operators, including Volotea, a smaller low-cost carrier. Ryanair Group was also in positive territory. Norwegian Group, starting the year around -50% is one of the low-costs bringing the overall low-cost average growth lower.

The graph shows average daily flights in the week to 13 March, worldwide, and so it reflects the disruption caused by Russia’s unprovoked invasion of Ukraine. Between the start of 2022 and mid-March, European flights had dipped and begun to recover from another aviation downturn, triggered as governments responded to the rapid spread of the omicron variant. This recovery is not uniform, with Ryanair traffic now 10% higher than 2019, while Wizz Air Group is at 10% below 2019.

Compared to other regions, European flights have been neither the slowest, nor the fastest to recover from the COVID-19 downturn. But 10% below 2019 for Wizz Air Group puts it in a stronger position than many significant global airlines. The result of that is that it moved up the rankings to enter the top 40 airline groups, in terms of flights.

Some of the seven European groups that featured in the top 40 in early 2019 are in weaker positions. British Airways Group, for example, was at -36% flights in mid March 2022 compared to 2019, meaning a drop of about 10 places. All seven, however, have remained firmly in the top 40, where Wizz Air has joined them. On current performance, Wizz Air looks ready to join them for the longer term.

Technical Bits: The global data are provided by Flightradar24. We provide regular comparisons of European aviation with other parts of the world in our Comprehensive Assessment reports. More European data on airlines is available daily in the aviation intelligence dashboard.

We take a broad definition of ‘airline’, to include cargo, business aviation and military. There is certainly an element of judgement in how airlines are grouped together for such statistics; we apply a three-level model, for example Lufthansa, then Lufthansa Airlines, then Lufthansa group.