

14 April 2022



EUROCONTROL

Comprehensive Assessment

EUROPEAN AVIATION



SUPPORTING EUROPEAN AVIATION



NETWORK
MANAGER



Headlines (Week of 7 – 13 April 2022)

- **24,648 daily flights** on average over past week, **increasing by 5% vs previous week**; 81% of 2019 levels.
- **Traffic in line with the new EUROCONTROL Traffic Scenarios** (6 April 2022): 79% for April so far vs 2019.
- With the beginning of the **Summer schedules**, **low-cost airlines** have **expanded capacities** throughout the network **as well as traditional airlines to a lesser extent**, notably British Airways and Lufthansa.
- With Easter holidays, **clear increase for the flows with South Europe**: Germany-Turkey (+36%), Spain-Germany (+14%), Spain-UK (+5%), Greece-Greece (+41%) and Germany-Italy (+10%) over last week.
- Over the past week, Ryanair was the busiest aircraft operator with 2,765 flights per day on average, followed by easyJet (1,515), Lufthansa (1,138), Turkish Airlines (1,096), Air France (901) and BA (709).
- Domestic traffic vs 2019: Europe (-16%), USA (-15%), **China (-77%, massive lockdown due new COVID-19 wave)** and Middle-East (-10%). **Flows Europe-US close to 2019 levels.**
- Jet fuel prices stable at 348 cts/gallon on 8 April (-1% over 1 week +49% since early January).
- All-cargo steady at +4% vs 2019. Other market segments increasing since start of Summer schedule.



Traffic Situation

Average daily flights (including overflights)

On week 07 - 13 Apr 2022

81%

of equivalent week in 2019

Top 10 Aircraft Operators

on Week 07 - 13 Apr 2022 (avg daily flights)



2. Operated **1 515 flights**
↓16%
 vs same week in 2019
↑3% vs prev week



3. Operated **1 138 flights**
↓28%
 vs same week in 2019
↑6% vs prev week



1. Operated **2 765 flights**
↑10%
 vs same week in 2019
↑0% vs prev week



4. Operated **1 096 flights**
↓15%
 vs same week in 2019
↓2% vs prev week



5. Operated **901 flights**
↓30%
 vs same week in 2019
↑3% vs prev week



6. Operated **709 flights**
↓26%
 vs same week in 2019
↑11% vs prev week



7. Operated **702 flights**
↓19%
 vs same week in 2019
↑1% vs prev week



8. Operated **681 flights**
↑16%
 vs same week in 2019
↑6% vs prev week



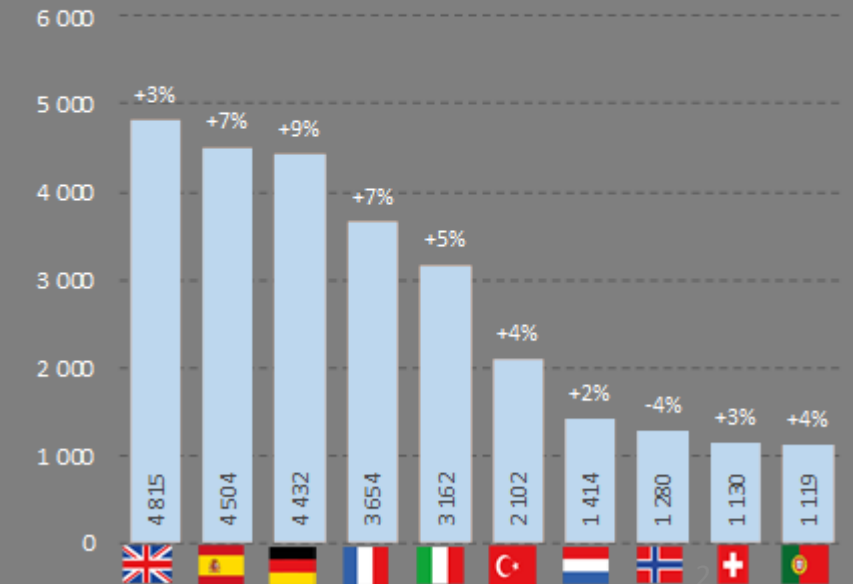
9. Operated **622 flights**
↓0.3%
 vs same week in 2019
↑13% vs prev week



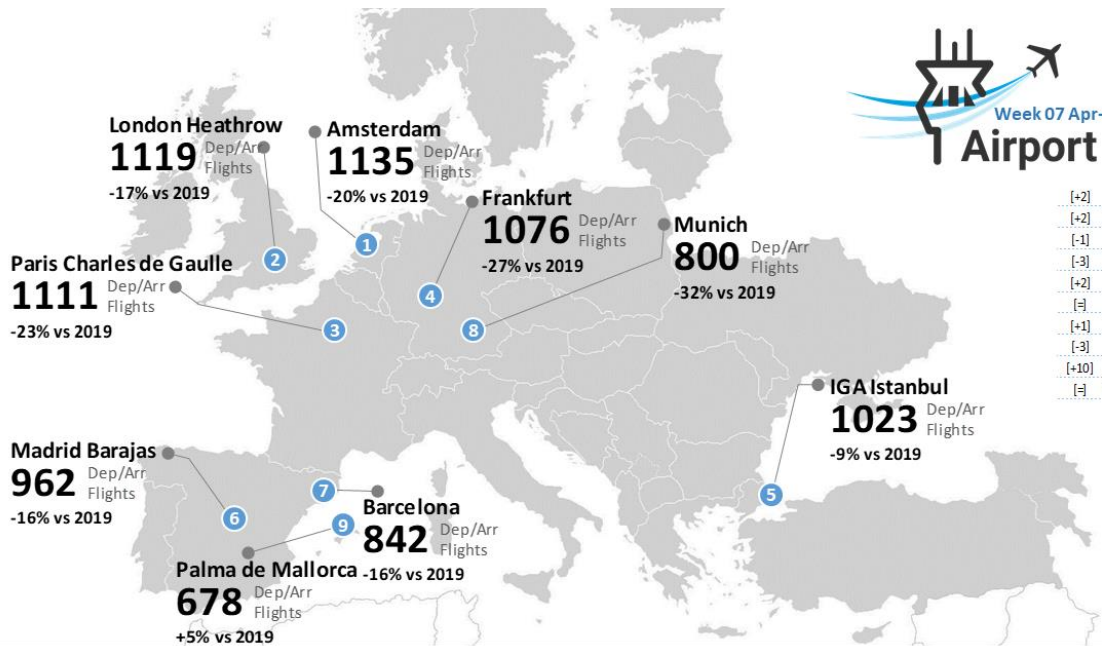
10. Operated **529 flights**
↓34%
 vs same week in 2019
↓3% vs prev week

Top 10 Busiest States

on week 07 - 13 Apr 2022 (avg daily flights)
 (Dep/Arr flights and comparison with previous week)



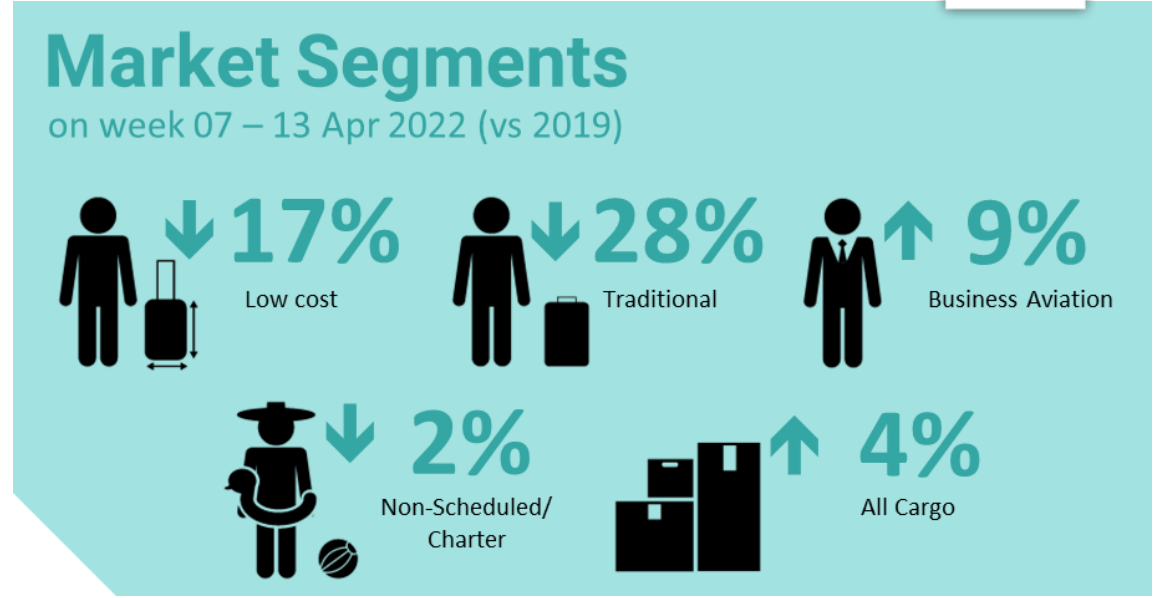
Top 10 Busiest Airports



Airport Ranking

Week 07 Apr-13 Apr 2022 (vs 2019)

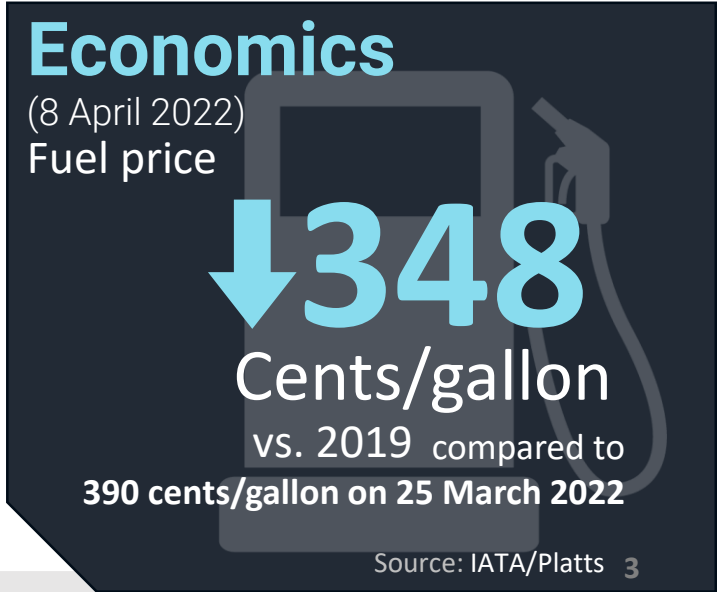
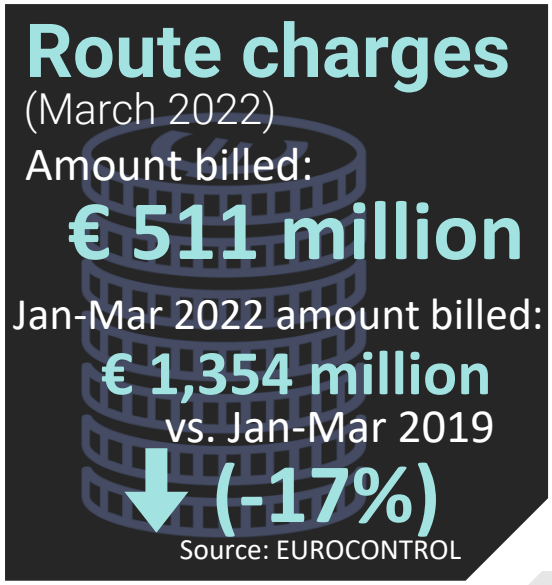
- [+2] 1 Amsterdam
- [+2] 2 London Heathrow
- [-1] 3 Paris Charles de Gaulle
- [-3] 4 Frankfurt
- [+2] 5 IGA Istanbul
- [-] 6 Madrid Barajas
- [+1] 7 Barcelona
- [-3] 8 Munich
- [+10] 9 Palma de Mallorca
- [-] 10 London Gatwick



Traffic Flow

Average daily flights on week of 07 - 13 Apr 2022

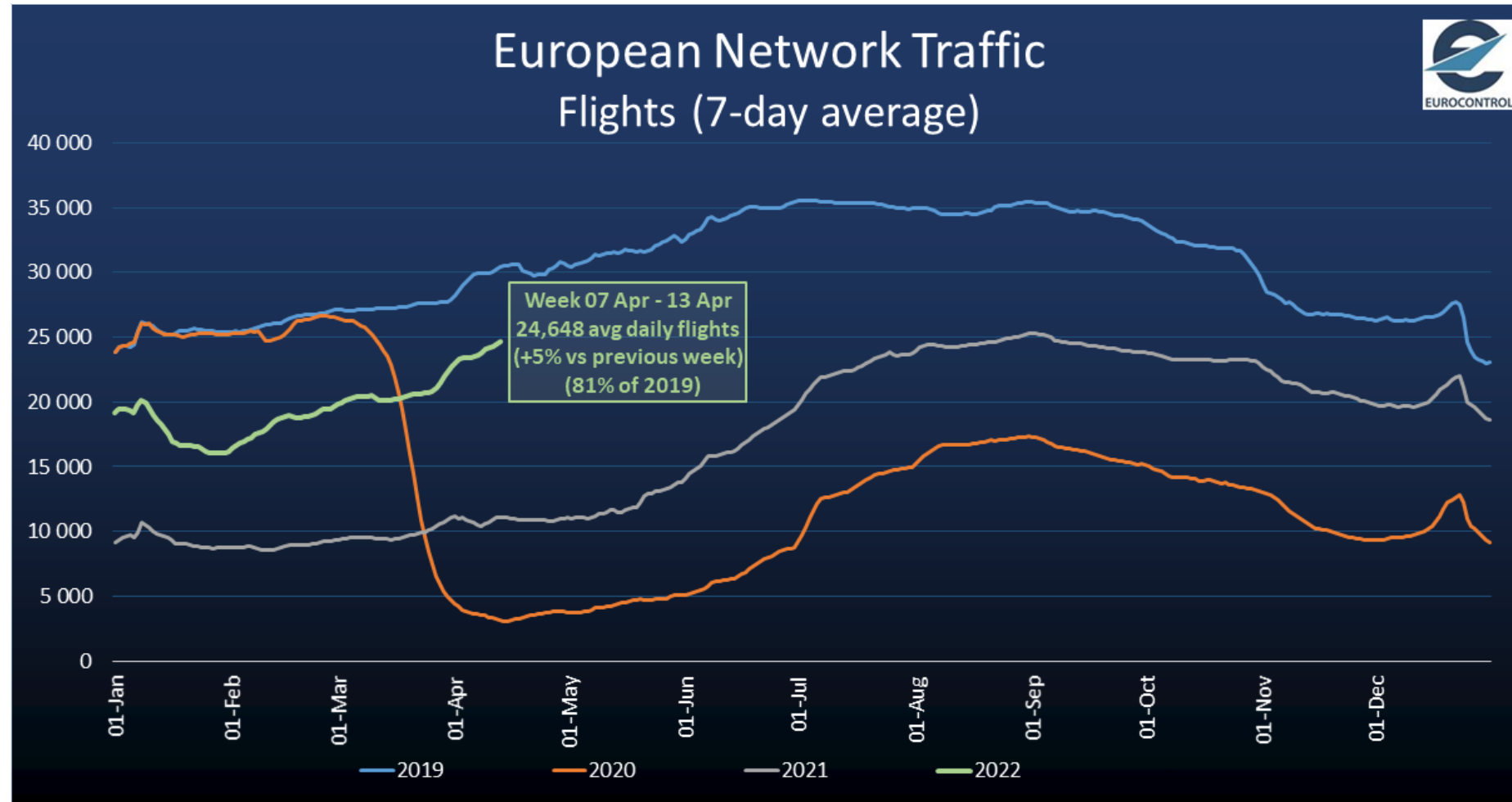
	Flights	vs previous week	vs 2019
Intra-European	20 048	+5%	-16%
Intercontinental	4 022	+3%	-33%



Overall traffic situation at network level

On week 7 – 13 April:

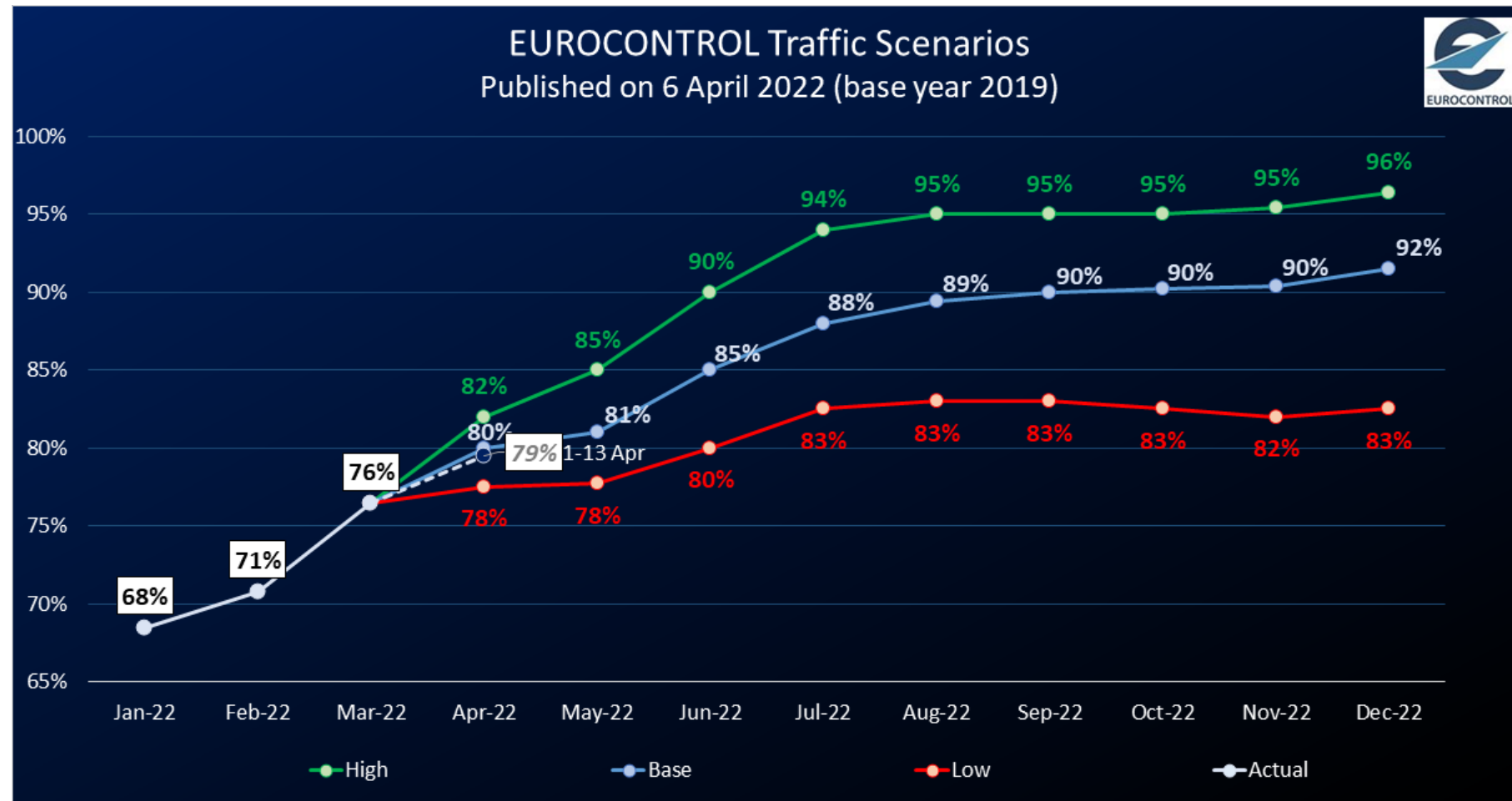
- ✂ **24,648** average daily flights.
- ✂ **+5%** on previous week.
- ✂ **81%** of 2019 traffic levels.
- ✂ Significant increase since the beginning of the Summer schedules on 27 March 2022.



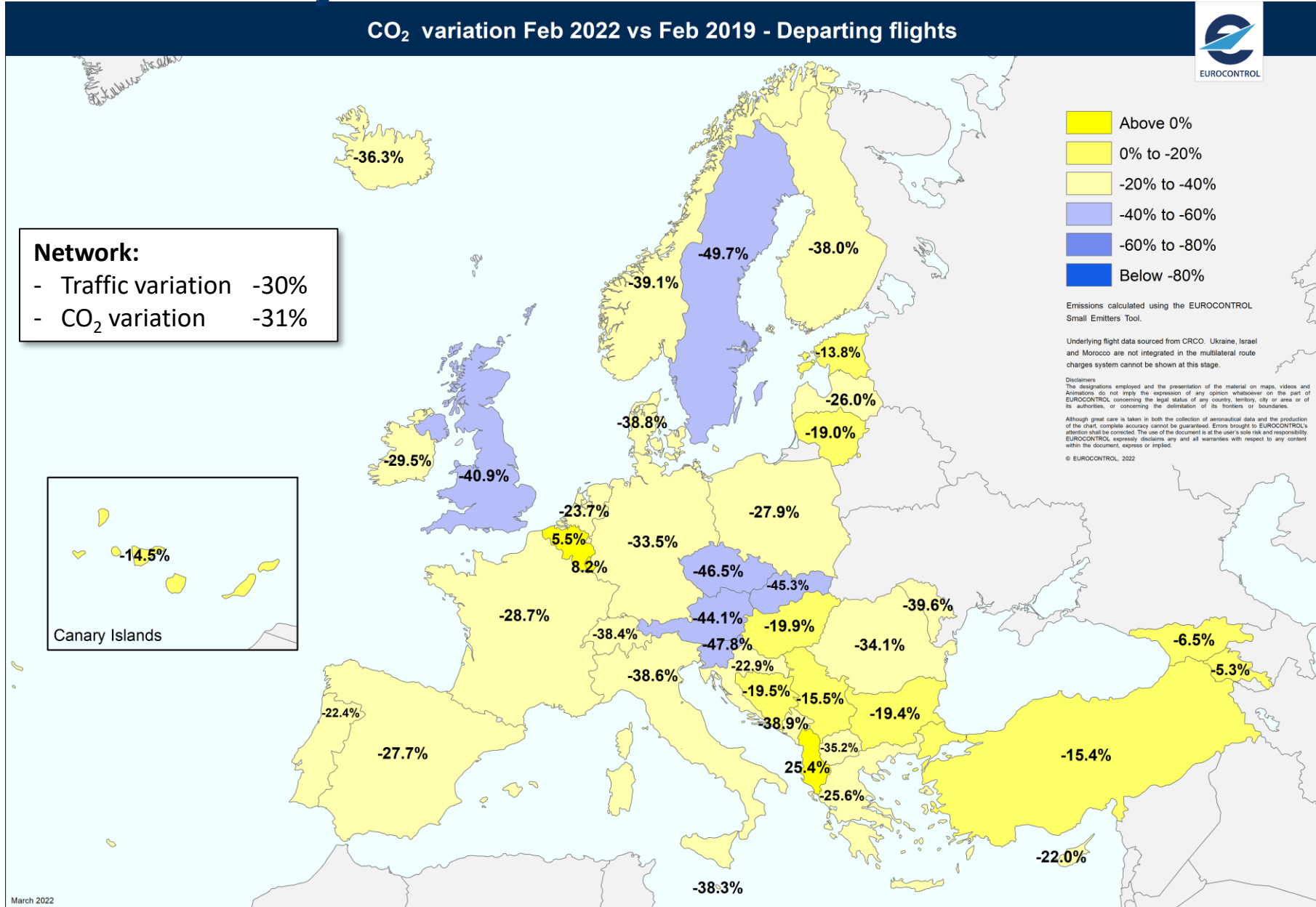
Current situation compared to the latest EUROCONTROL traffic scenarios



- ✘ EUROCONTROL has published new traffic scenarios on 6 April 2022.
- ✘ For the first 13 days of **April**, network traffic is at **79% of 2019** levels, close to the base scenario.
- ✘ Over the first quarter of 2022, network traffic stands at **73%** of 2019.



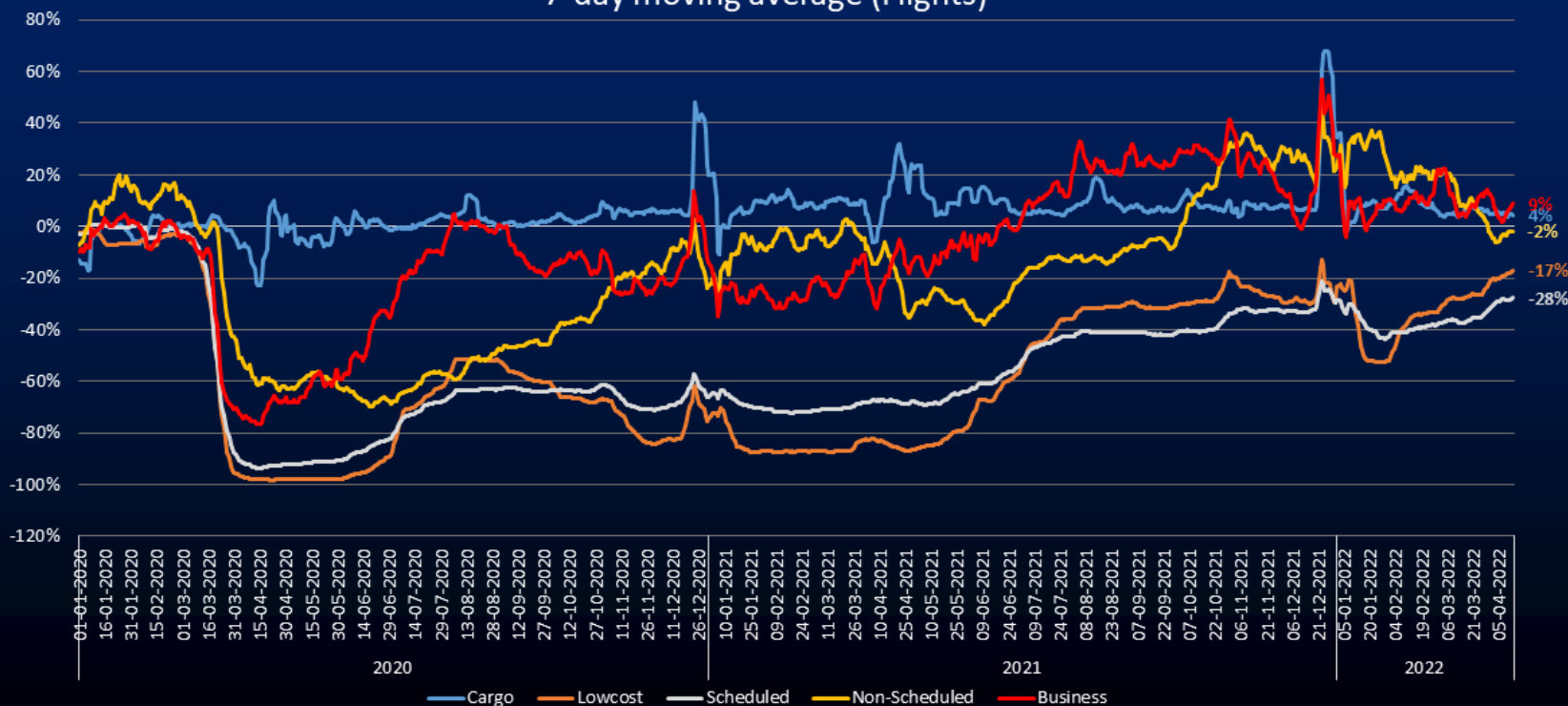
Aviation Sustainability





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 (+4%)** and **Business Aviation (+9%)**.
- ✘ **Charter (-2%)** saw a decrease since January but a rebound with the start of the Summer schedule.
- ✘ **Traditional (-28%)** and **Low-Cost (-17%)** continued to catch up vs 2019. Both segments 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 (07 - 13 Apr 2022)		
	Average flights per day	% vs 2019	% over previous week
RYANAIR	2 765	+10%	+0%
easyJet	1 515	-16%	+3%
Lufthansa	1 138	-28%	+6%
TURKISH AIRLINES	1 096	-15%	-2%
AIRFRANCE	901	-30%	+3%
BRITISH AIRWAYS	709	-26%	+11%
KLM Royal Dutch Airlines	702	-19%	+1%
WIZZ	681	+16%	+6%
vueling	622	-0%	+13%
Scandinavian Airlines	529	-34%	-3%

✘ **Ryanair** is the busiest Aircraft Operator with 2,765 flights per day on average over last week, followed by **easyJet** (1,515), **Lufthansa** (1,138), **Turkish Airlines** (1,096), **Air France** (901), **British Airways** (709) and **KLM** (702).

Within the top 10, **8 airlines** posted **increases** over the previous week, highest being:

- ✘ **British Airways** (+72 flights per day on average; +11%) mainly due to flows between UK and Germany, France, UK, Spain, Italy and the US.
- ✘ **Vueling** (+71 flights; +13%) mainly due to flows between Spain and Spain, Italy, France and UK.
- ✘ **Lufthansa** (+63 flights; +6%) mainly due to flows between Germany and Italy, Spain, Greece, Germany and the US.
- ✘ **easyJet** (+44 flights; +3%) mainly due to Spain-UK, France-France, France-UK, UK-UK and Greece-UK.

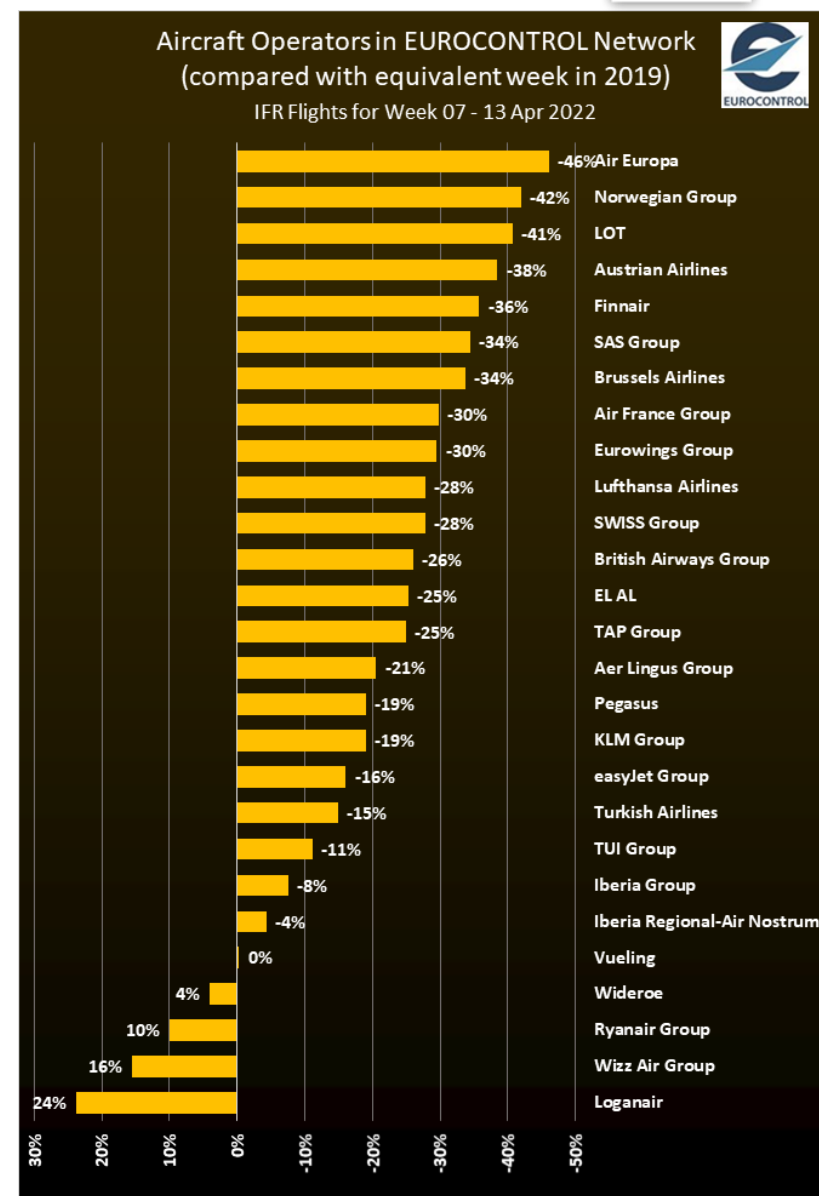
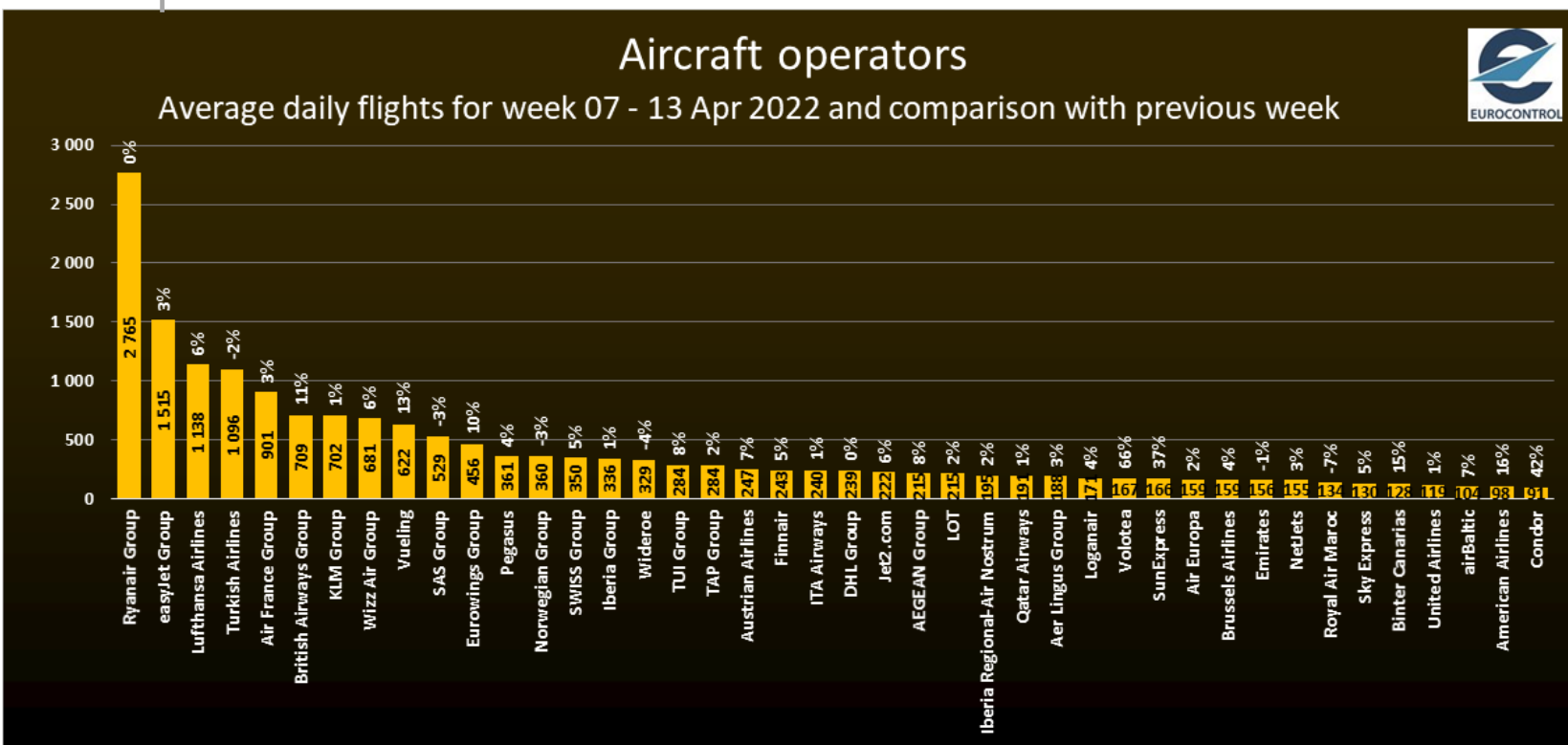
2 airlines posted a decrease:

- ✘ **Turkish Airlines** (-17 flights): flows between Turkey and Turkey, Iran and Kazakhstan.
- ✘ **SAS** (-15 flights): domestic flows in Norway.

Aircraft operators (Average daily flights for the last week)



Top 40



- ✦ Largest increases in flights vs previous week for **British Airways (+11%)**, **Vueling (+13%)**, **Volotea (+66%)**, **Lufthansa (+6%)**, **Sun Express (+37%)**, **easyJet (+3%)** and **Eurowings (+10%)**, **Wizz Air (+6%)** and **Condor (+42%)**.
- ✦ Largest decreases for **Turkish Airlines (-2%)**, **SAS (-3%)**, **Wideroe (-4%)**, **Norwegian (-3%)** and **Royal Air Maroc (-7%)**
- ✦ Traffic levels ranging from **-46% (Air Europa)** to **+24% (Loganair)** vs 2019.

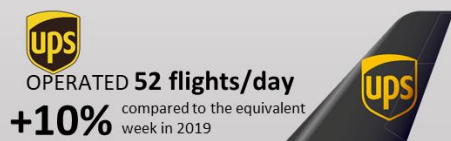
Aircraft operators (Average daily flights for the last week)

Cargo, Legacy, Low Cost and Regional Carriers



PERFORMANCE OF MAJOR CARGO CARRIERS

for the week 7 - 13 April 2022



PERFORMANCE OF MAJOR LOW-COST CARRIERS

for the week 7 - 13 April 2022



PERFORMANCE OF MAJOR LONG-HAUL/LEGACY CARRIERS

for the week 7 - 13 April 2022



PERFORMANCE OF MAJOR REGIONAL CARRIERS*

for the week 7 - 13 April 2022



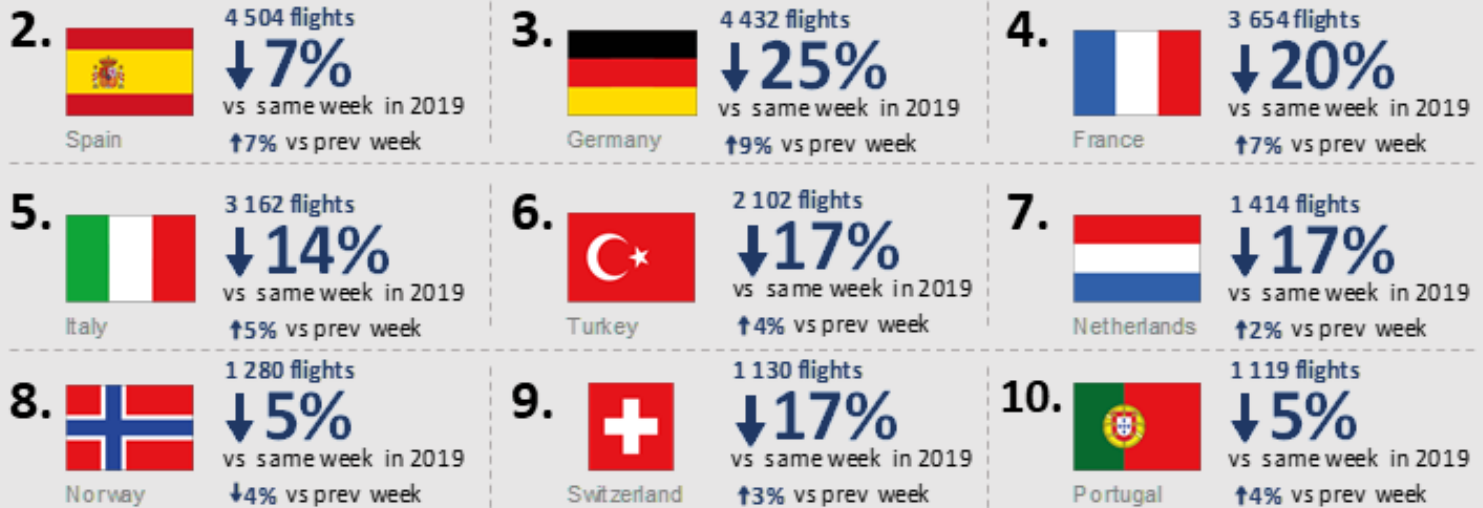
*REGIONAL AIRLINES USING SEPARATE IATA CODES

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



Top 10 States

on week 07 - 13 Apr 2022 (avg daily dep/arr)



✘ **UK** is the State with the highest number of dep/arr flights on average over last week (4,815) followed by **Spain** (4,504), **Germany** (4,432), **France** (3,654) and **Italy** (3,162).

✘ The ranking has not changed compared with the previous week.

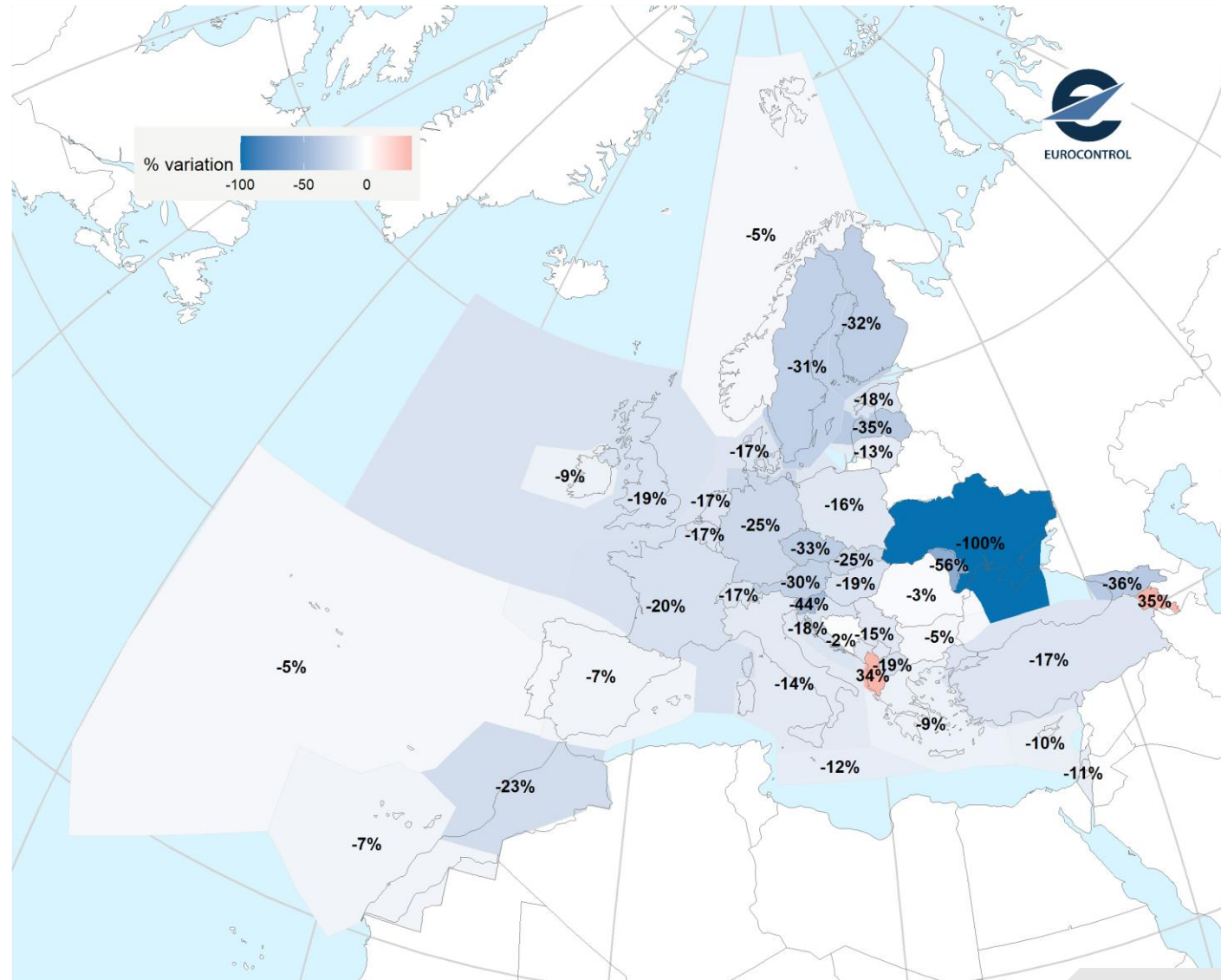
Within the top 10, **nine** States posted flight increases over the previous week:

- ✘ **Germany** (+375 flights; +9%): light AOs, Lufthansa, Eurowings and SunExpress. Domestic flows and flows with Turkey, Spain, Greece and Italy.
- ✘ **Spain** (+306 flights; +7%): Vueling, Binter Canarias, Volotea and Eurowings. Domestic flows and flows with Germany, Spain and France.
- ✘ **France** (+227 flights; +7%): Volotea and light AOs. Domestic flows by far.
- ✘ **UK** (+162 flights; +3%): British Airways. Domestic flows and flows with Spain.
- ✘ **Italy** (+149 flights; +5%): light AOs, Volotea, Vueling and Lufthansa. Domestic flows and flows with Germany.
- ✘ **Greece** (+111 flights; +15%): Aegean, Condor and Sky Express. Flows with Germany, Greece, France, UK and Israel.

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

State FIR daily % arrivals/departures variation vs 2019 on 2022-04-13

7-day average - FIRs at altitude FL200



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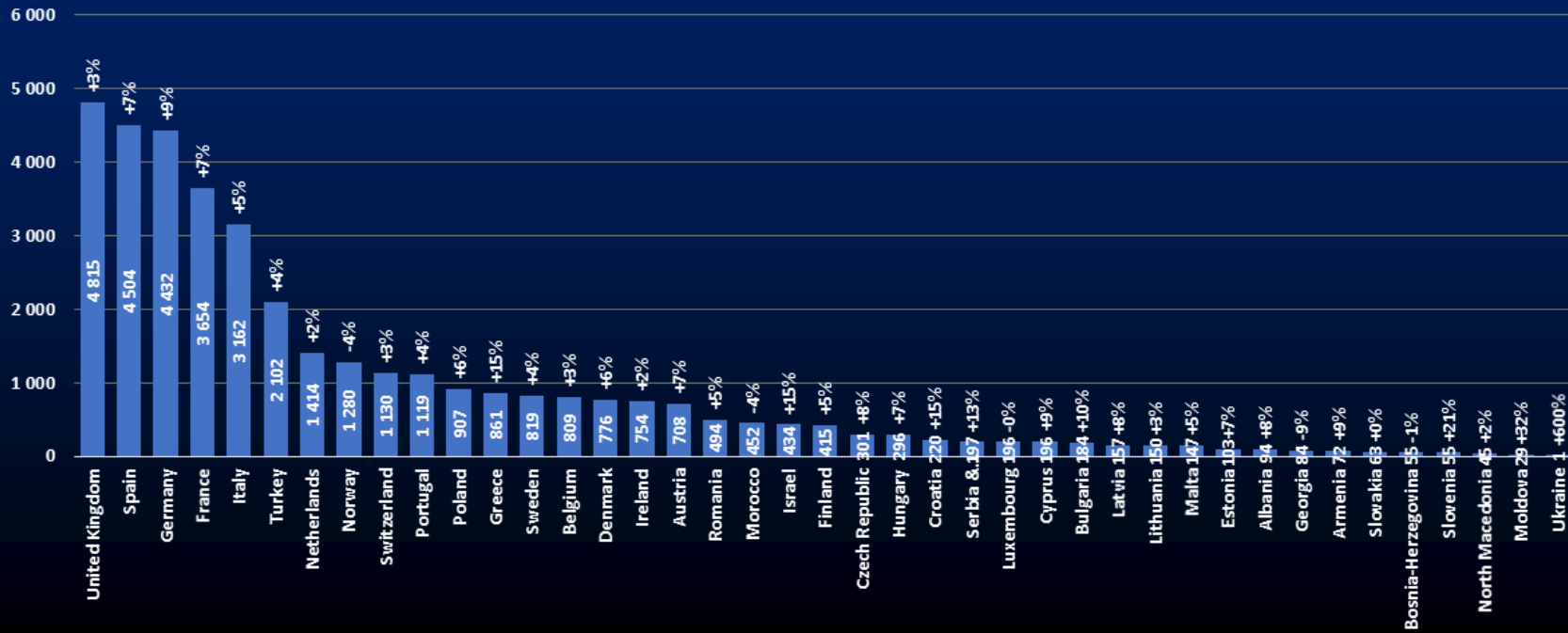
States (Average Daily Departure/Arrival flights for the last week)

Top 40



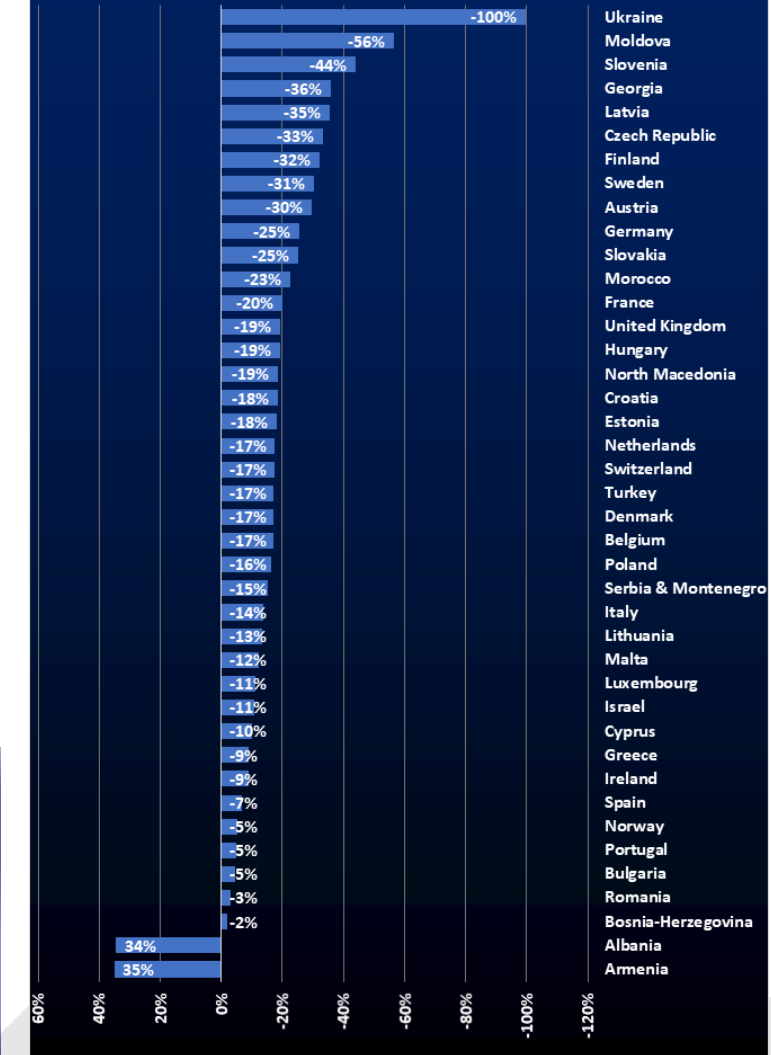
States (Dep/Arr flights)

Average daily flights for week 07 - 13 Apr 2022 and comparison with previous week



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

IFR Dep/Arr Flights for Week 07 - 13 Apr 2022



✘ Highest increases in flights vs previous week for **Germany (+9%)**, **Spain (+7%)**, **France (+7%)**, **UK (+3%)**, **Italy (+5%)** and **Greece (+15%)**.

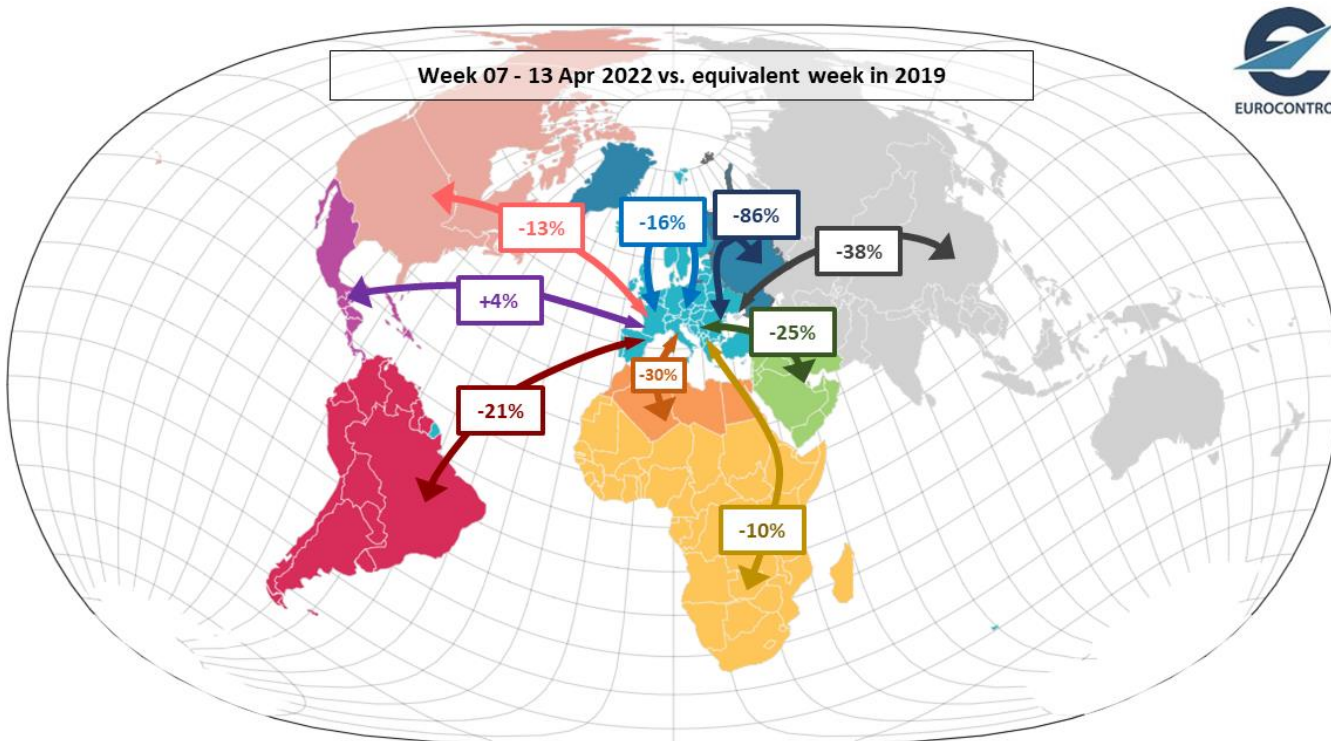
✘ Highest decreases for **Norway (-4%)** and **Morocco (-4%)**.

✘ Traffic levels ranging from **-100% (Ukraine)** to **+35% (Armenia)**, compared to 2019.

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

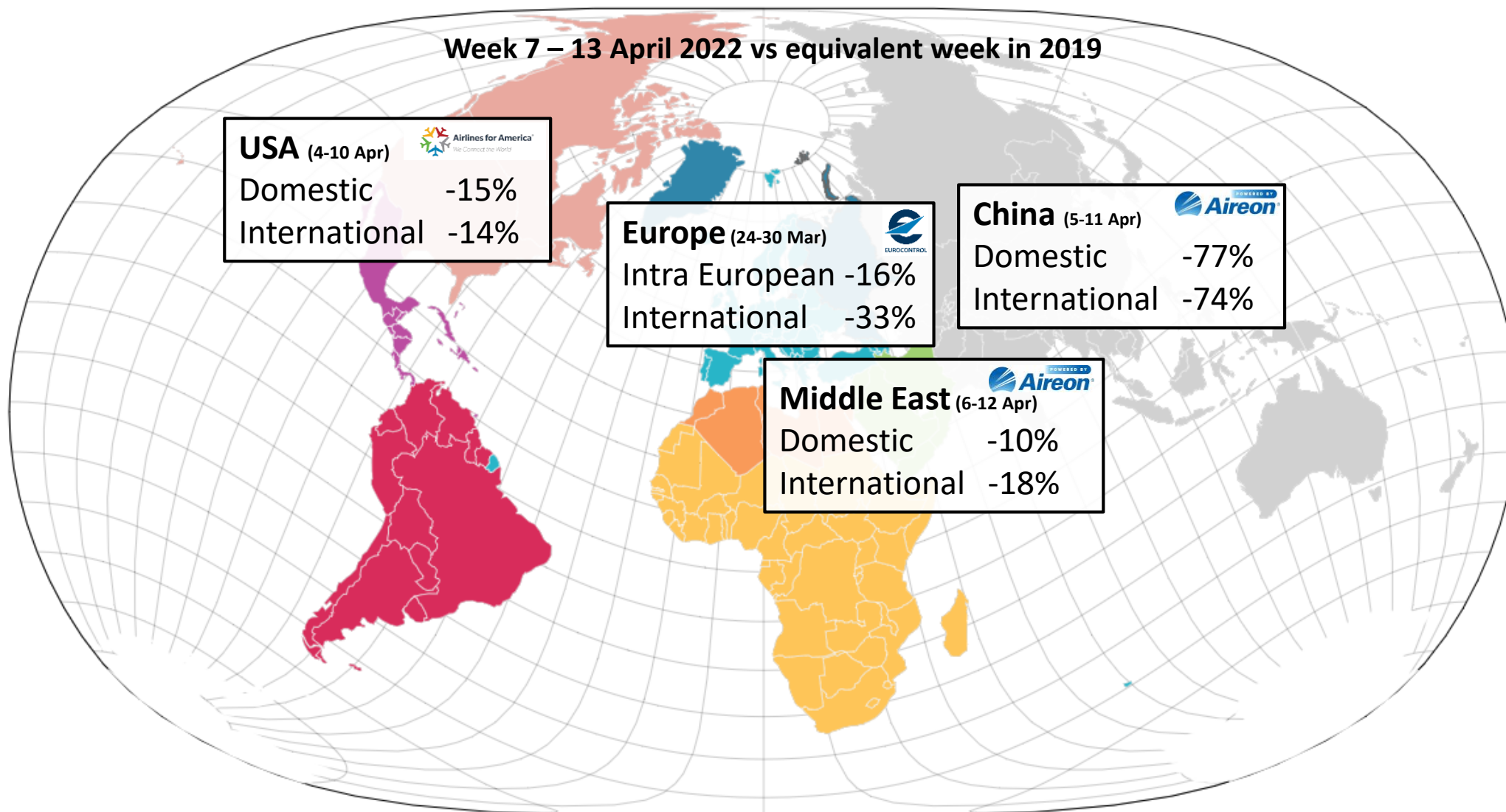


- ✘ The main traffic flow is the intra-Europe flow with 20,048 flights on average the most recent week, increasing by 5% over the previous week.
- ✘ Flows between Europe and Other Europe (incl. Russia) are at -86% compared to 2019.
- ✘ Important lockdown in China, owing to a surge in COVID-19 cases is affecting Chinese domestic flows (next slide).
- ✘ Intra-Europe flights are at -16% compared to 2019 while intercontinental flows are at -33%.



REGION (Average daily flights)	Week 31/03/2022 - 06/04/2022	Week 07/04/2022 - 13/04/2022	%	vs. 2019
Intra-Europe	19 055	20 048	+5%	-16%
Europe<->Asia/Pacific	475	488	+3%	-38%
Europe<->Mid-Atlantic	174	187	+7%	+4%
Europe<->Middle-East	1 049	1 037	-1%	-25%
Europe<->North Atlantic	965	1 007	+4%	-13%
Europe<->North-Africa	727	759	+4%	-30%
Europe<->Other Europe	103	127	+22%	-86%
Europe<->South-Atlantic	141	140	-0%	-21%
Europe<->Southern Africa	270	277	+3%	-10%
Non Intra-Europe	3 905	4 022	+3%	-33%

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



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



Top 20

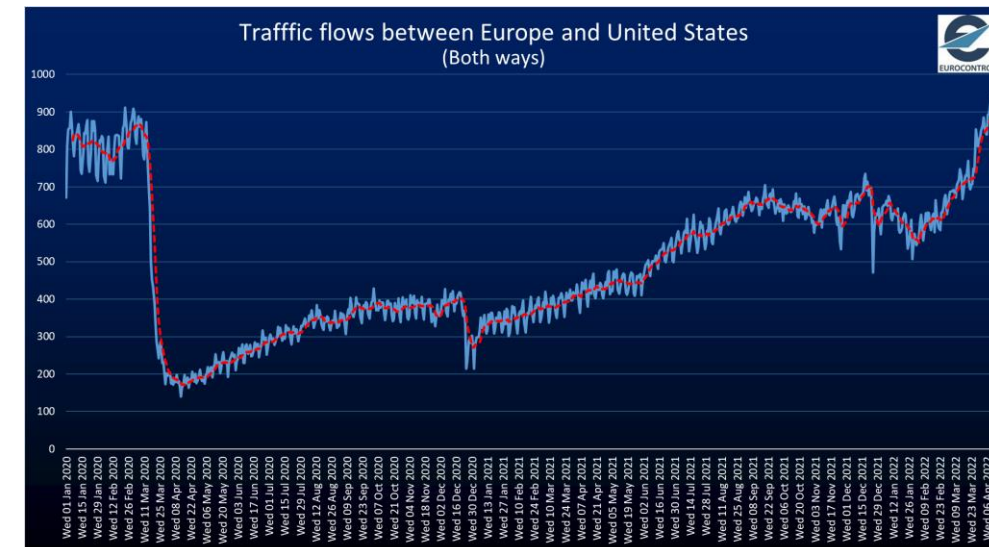
Rank evolution over prev. week	Top 20 Long Haul Airport-Pairs on week 07 - 13 Apr 2022				
	Airport-Pair	Avg daily flights	Δ vs prev. week	% vs prev. week	% vs 2019
→	London/Heathrow <-> New York JFK	36	→ +1	+3%	↘ -9%
↗	Paris/Charles-De-Gaulle <-> New York JFK	16	→ +0	+0%	↗ +5%
↘	London/Heathrow <-> Dubai	16	→ -0	-3%	↘ -2%
↗	London/Heathrow <-> Chicago O Hare Intl	14	→ +1	+7%	↘ -18%
↘	London/Heathrow <-> Los Angeles	14	→ +0	+0%	↘ -23%
↗	Frankfurt <-> Seoul/Inchon INTL	13	→ +0	+3%	↗ +43%
↘	Paris/Charles-De-Gaulle <-> Dubai	13	→ -0	-2%	↗ +39%
↘	Madrid/Barajas <-> Bogota Intl/Eldorado	12	→ -1	-5%	↗ +17%
↗	London/Heathrow <-> Boston	12	↗ +1	+12%	↘ -14%
↗	London/Heathrow <-> Newark	12	→ +0	+0%	↘ -23%
↘	London/Heathrow <-> San Francisco	11	→ +1	+5%	↘ -3%
↘	Frankfurt <-> Chicago O Hare Intl	11	→ +0	+3%	↘ -1%
↗	Milan/Malpensa <-> New York JFK	10	→ +1	+7%	↗ +1%
↗	Paris/Orly <-> Fort de France	10	↗ +4	+53%	↗ +6%
↘	London/Heathrow <-> Hamad INTL	10	→ +0	+0%	↘ -30%
↗	London/Heathrow <-> Dallas/Fort Worth	10	↗ +1	+17%	↘ -1%
↗	Paris/Orly <-> Pointe-A-Pitre/Le Ra	10	↗ +2	+28%	↘ -11%
↘	Amsterdam <-> New York JFK	10	→ +0	+2%	↘ -19%
↘	Madrid/Barajas <-> New York JFK	9	→ +1	+6%	↘ -12%
↘	London/Heathrow <-> Washington	9	→ +0	+2%	↘ -20%

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

Increases for:

- ✈ Paris/Orly – Fort de France (+4 flights)
- ✈ Paris/Orly – Pointe à Pitre (+2 flights)
- ✈ London Heathrow – New York JFK, Chicago, Boston and San Francisco (+1 flight for each)

Traffic flows with the US close to 2019 levels.



Country pairs (Average Daily flights for the last week)

Top 10



Rank evolution over prev. week	Top 10 Country-Pair on week 07 - 13 Apr 2022				
	Country-Pair	Avg daily flights	Δ vs prev. week	% vs prev. week	% vs 2019
→	Spain <-> Spain	1 185	↗ +55	+5%	↘ -2%
→	France <-> France	928	↗ +63	+7%	↘ -21%
↗	Italy <-> Italy	816	↗ +20	+3%	→ -0%
↗	United Kingdom <-> United Kingdom	782	↗ +36	+5%	↘ -26%
↘	Norway <-> Norway	759	↘ -69	-8%	↗ +7%
→	Spain <-> United Kingdom	728	↗ +37	+5%	↘ -11%
→	Turkey <-> Turkey	627	↘ -24	-4%	↘ -29%
→	Germany <-> Germany	621	↗ +44	+8%	↘ -37%
→	Germany <-> Spain	559	↗ +67	+14%	↘ -5%
→	Germany <-> Italy	342	↗ +32	+10%	↘ -24%

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, domestic flows in Italy and UK increased their ranking while domestic flows in Norway decreased.

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

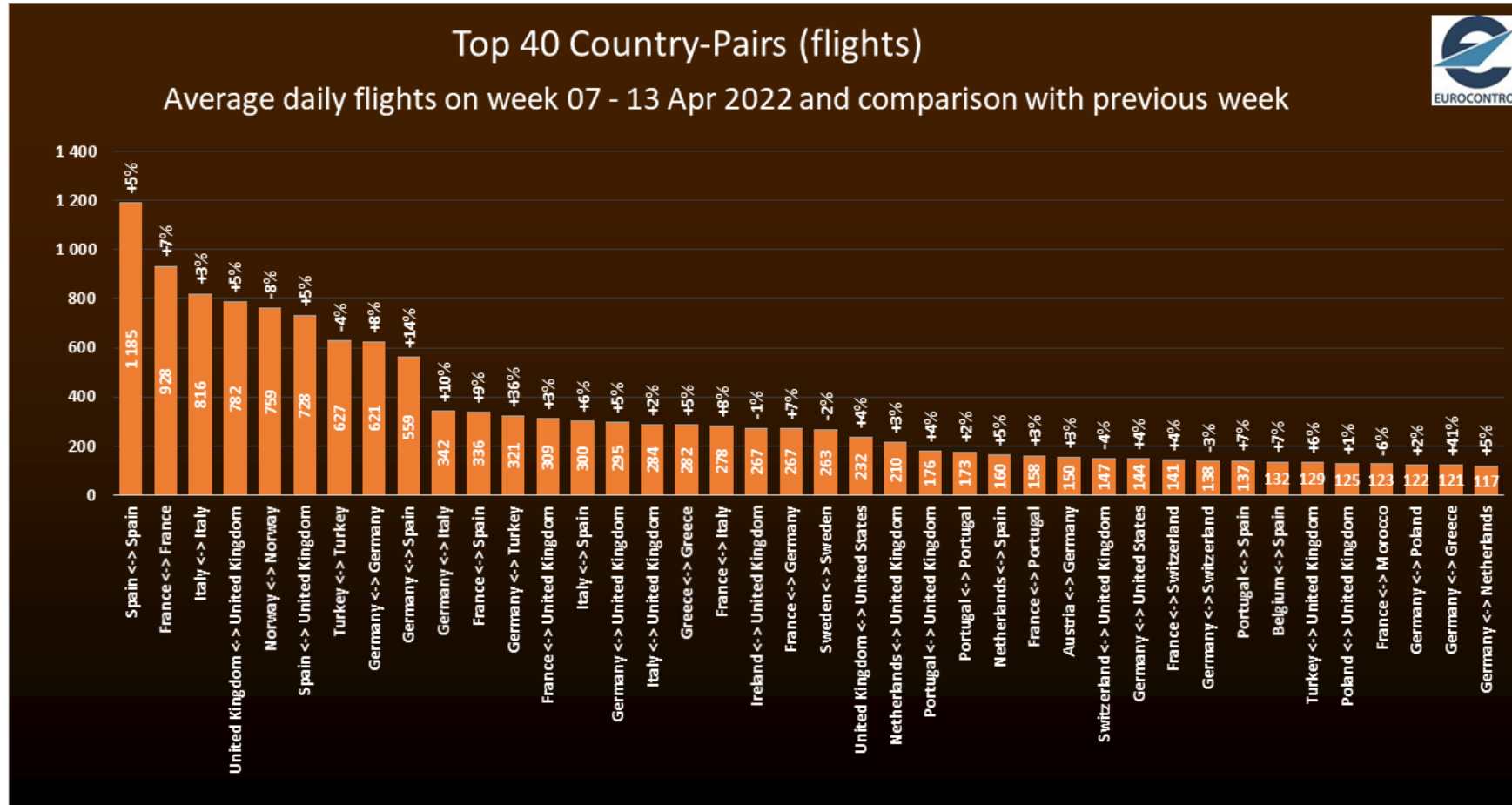
- ✘ **Germany-Spain** (+67 flights; +14%): Eurowings, Condor and Lufthansa.
- ✘ **France-France** (+63 flights; +7%): Volotea and light aircraft operators.
- ✘ **Spain-Spain** (+55 flights; +5%): Vueling, Binter Canarias, Iberia Express, Canarias Airlines and Volotea.
- ✘ **Germany-Germany** (+44 flights; +8%): light aircraft operators.

Highest decreases for:

- ✘ **Norway-Norway** (-69 flights; -8%): SAS, Norwegian and Wideroe.
- ✘ **Turkey-Turkey** (-24 flights; -4%): Turkish Airlines, Pegasus and SunExpress.

Country pairs (Average Daily flights for the last week)

Top 40



- ✘ Highest increase in flights vs previous week for **Germany-Turkey (+36%)**, **Germany-Spain (+14%)**, **France-France (+7%)**, **Spain-Spain (+5%)**, **Germany-Germany (+8%)**, **Spain-UK (+5%)**, **UK-UK (+5%)**, **Greece-Greece (+41%)** and **Germany-Italy (+10%)**.
- ✘ Highest decrease for **Norway-Norway (-8%)** and **Turkey-Turkey (-4%)**.

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



Top 10

Rank evolution over prev. Week	Top 10 Airports on week 07 Apr - 13 Apr 2022				
	Airport	Average Daily Dep/Arr Flights	Δ over prev. week	% over prev. week	% vs 2019
→	Amsterdam	1,135	↗ +7	+1%	↘ -20%
↗	London/Heathrow	1,119	↗ +76	+7%	↘ -17%
↘	Paris/Charles-De-Gaulle	1,111	↗ +49	+5%	↘ -23%
↗	Frankfurt	1,076	↗ +69	+7%	↘ -27%
↘	IGA Istanbul Airport	1,023	↘ -12	-1%	↘ -9%
→	Madrid/Barajas	962	↗ +20	+2%	↘ -16%
→	Barcelona	842	↗ +55	+7%	↘ -16%
→	Munich	800	↗ +54	+7%	↘ -32%
↗	Palma De Mallorca	678	↗ +91	+16%	↗ +5%
↘	London/Gatwick	633	↗ +25	+4%	↘ -22%

Within the top 10, **nine** airports recorded **increases** over the previous week:

- ✘ **Palma** (+91 flights; +16%): Eurowings and Condor. Mainly Germany-Spain.
- ✘ **London Heathrow** (+76 flights; +7%): British Airways. Flows with Germany, UK, France and the US.
- ✘ **Frankfurt** (+69 flights; +7%): Lufthansa. Flows with Spain, Italy, Turkey, Greece, the US, Croatia and Sweden.

Decrease for:

- ✘ **IGA Istanbul** (-12 flights; -1%): Turkish Airlines and light aircraft operators. Flows with Iran, Turkey, Iraq, Libya and Kuwait.

✘ **Amsterdam** is the airport with the highest number of dep/arr flights (1,135) followed by **London Heathrow** (1,119), **Paris CDG** (1,111), Frankfurt (1,076) and **IGA Istanbul** (1,023).

✘ **Heathrow**, **Frankfurt** and **Palma** increased their rankings vs previous week while **Paris/CDG**, **IGA Istanbul** and **London/Gatwick** decreased their ranking

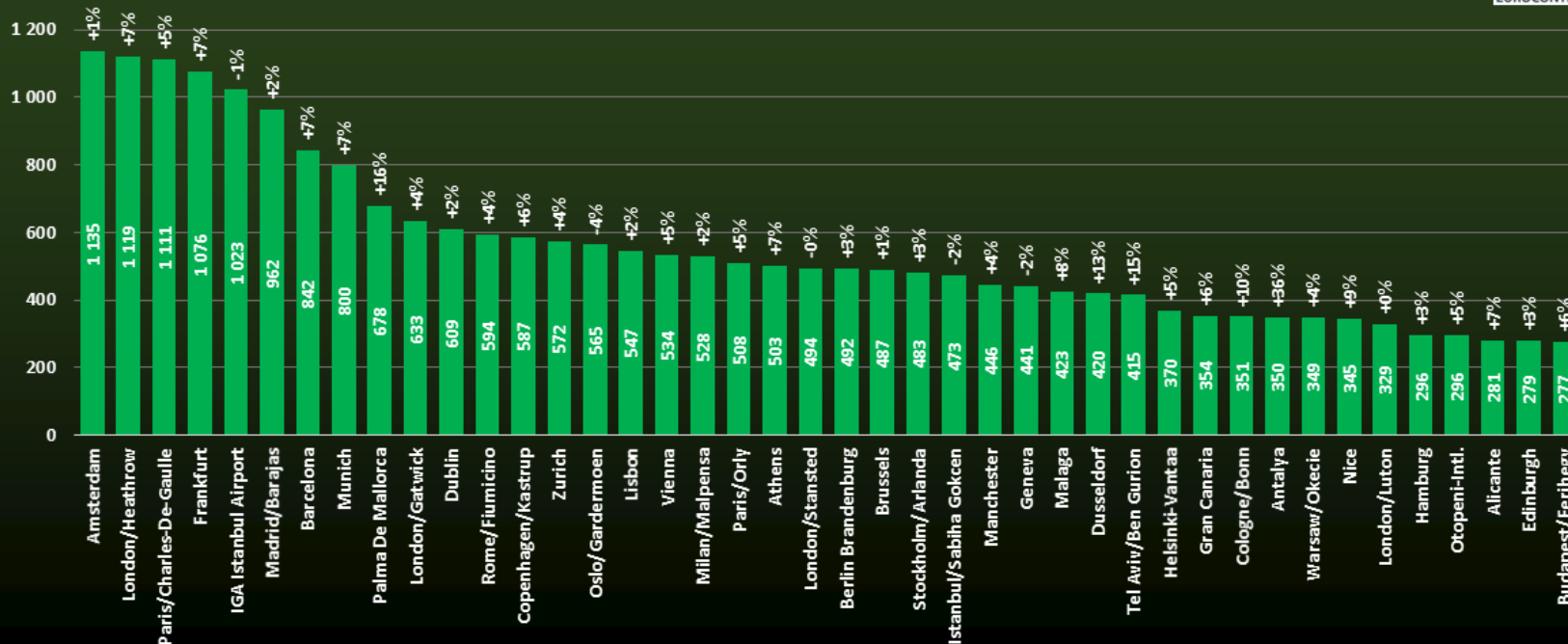
Airports (Average Daily Departure/Arrival flights for the last week)

Top 40



Top 40 Airports (Dep/Arr flights)

Average daily flights for week 07 - 13 Apr 2022 and comparison with previous week



✘ Highest increases in flights vs the previous week for **Antalya (+36%)**, **Palma (+16%)**, **London/Heathrow (+7%)**, **Frankfurt (+7%)**, **Tel Aviv (+15%)**, **Barcelona (+7%)**, **Munich (+7%)**, **Dusseldorf (+13%)** and **Paris/CDG (+5%)**.

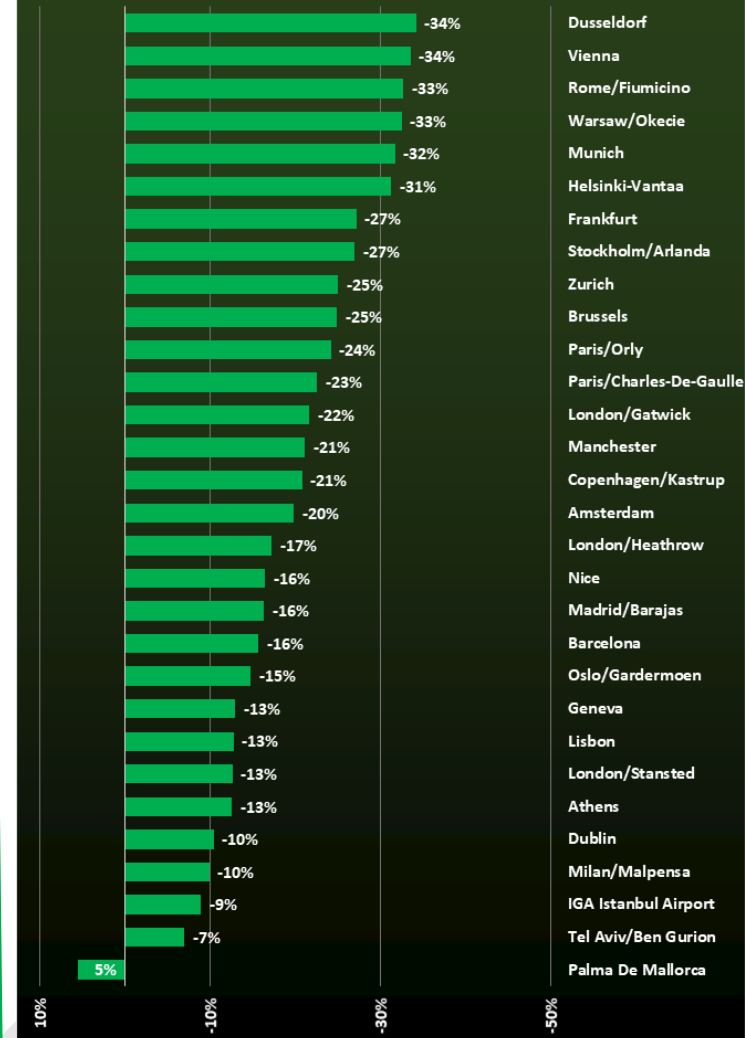
✘ Highest decreases for **Oslo (-4%)**, **IGA Istanbul (-1%)** and **Geneva (-2%)**.

✘ Traffic levels ranging from -34% (Dusseldorf) to +5% (Palma), compared to 2019.

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



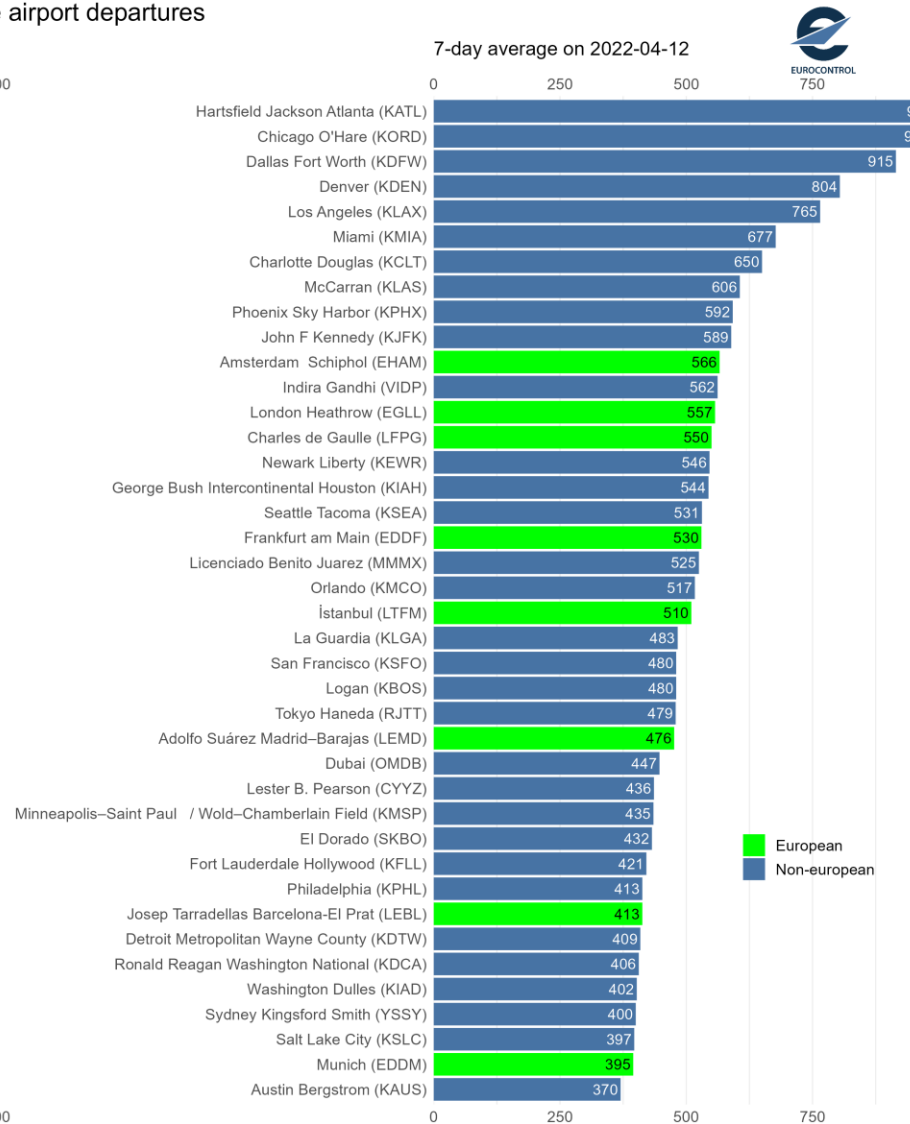
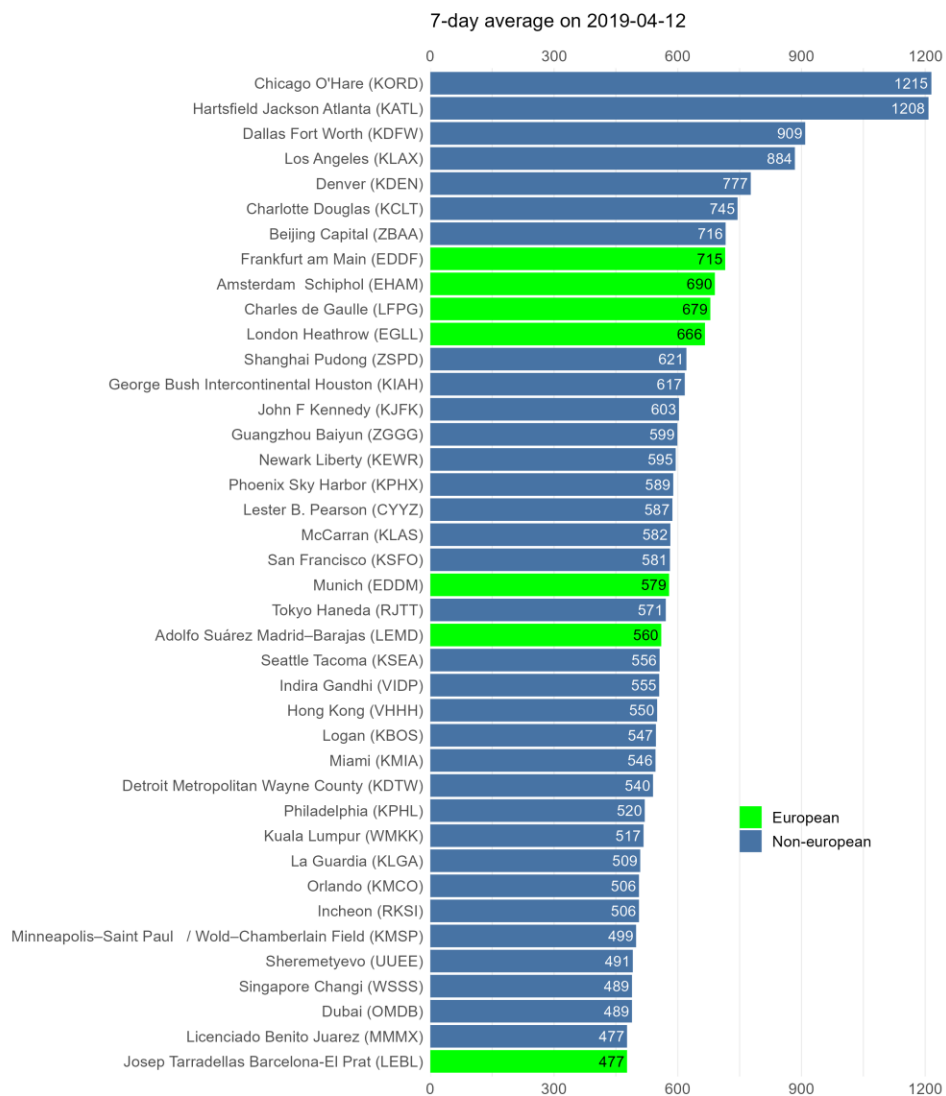
IFR Dep/Arr Flights for Week 07 - 13 Apr 2022



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):

✘ **Eight European airports** are ranked in the top 40 global airports, with four (Amsterdam, Heathrow, Paris CDG and Frankfurt) in the top 20.

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

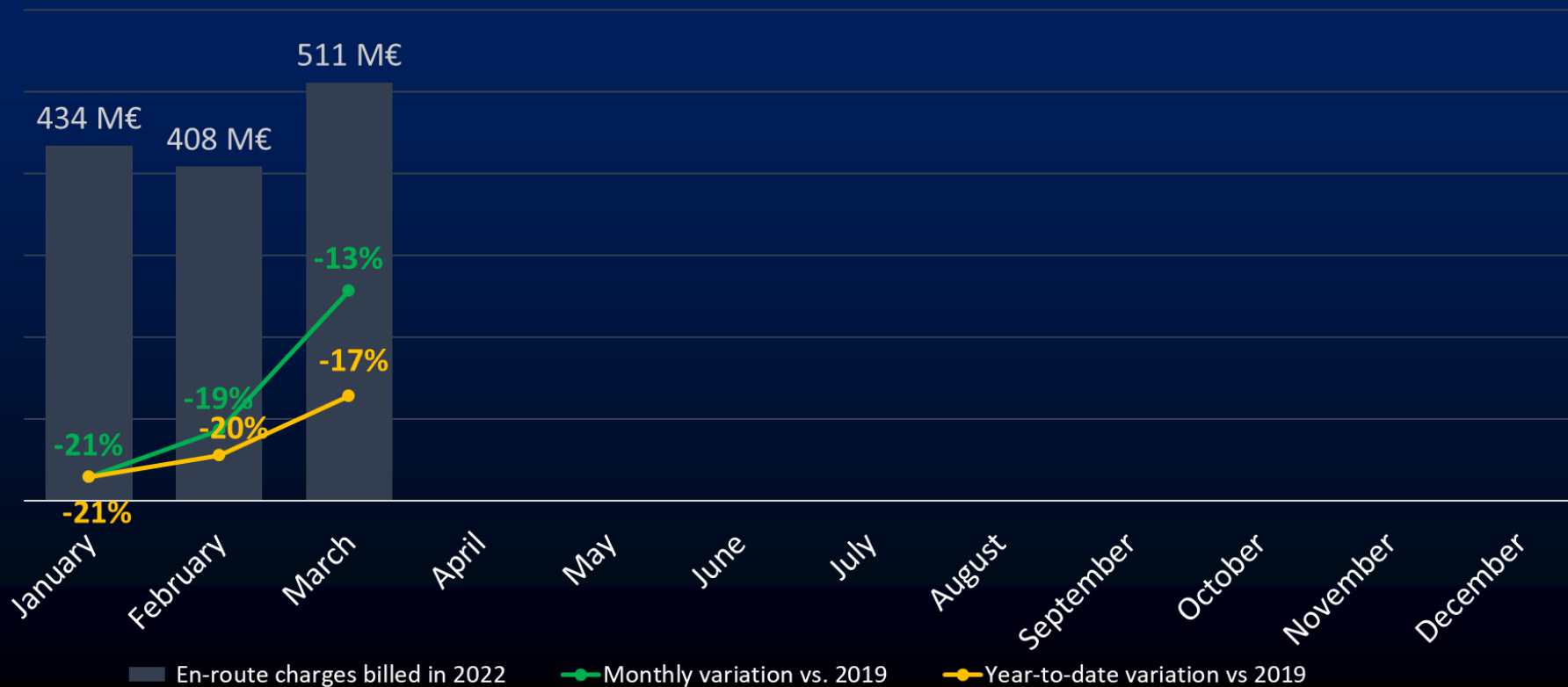
✘ The **first Asian airport** is currently **Tokyo** (25th); where it used to be Beijing (7th in 2019).

Source: Flightradar24 Historical Global Utilisation data

En-Route Air Navigation charges



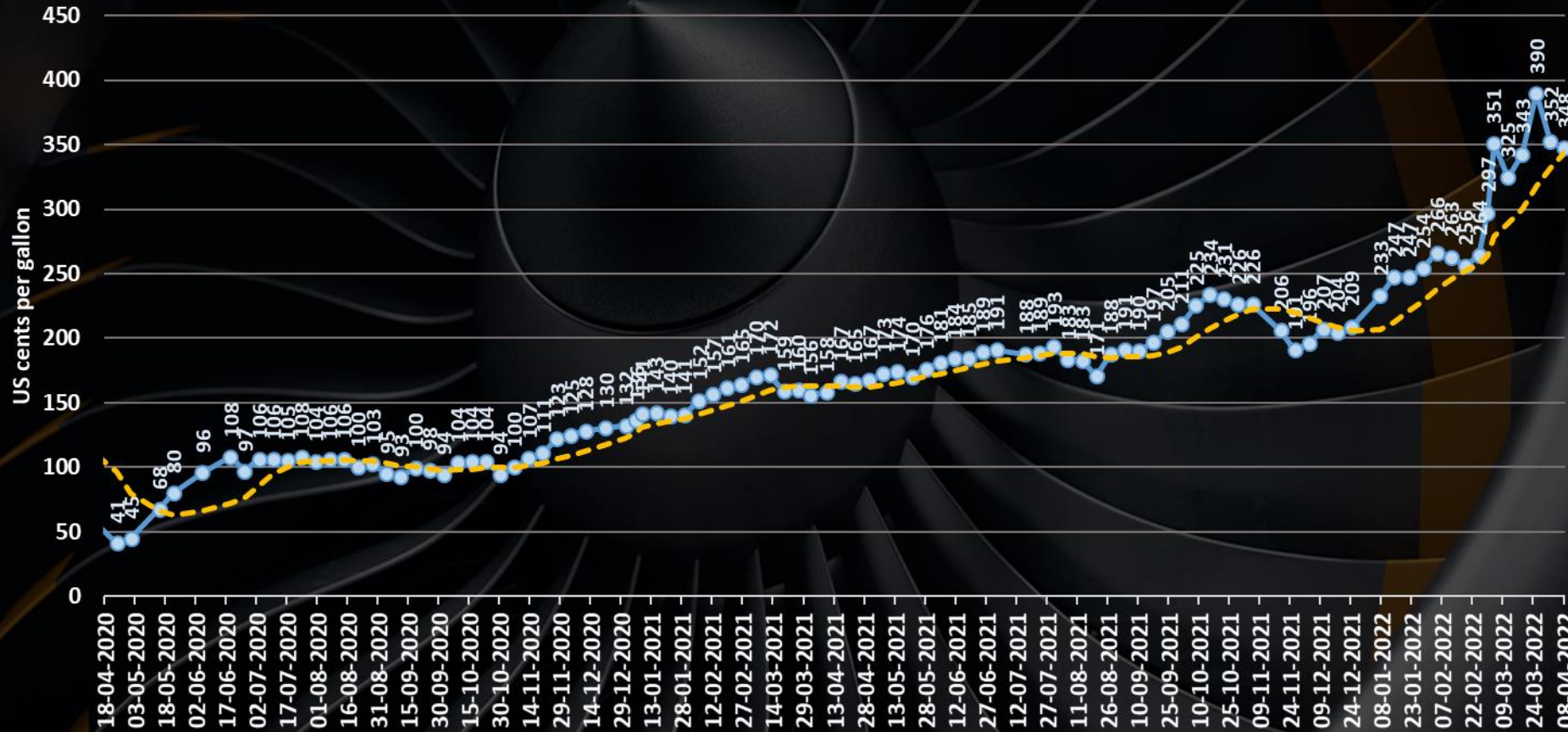
En-route air navigation charges for the EUROCONTROL Area (2022)
Year-to-date amount billed: 1,354 M€ (-17% vs 2019)



- ✘ **EUROCONTROL** has billed **511M€** of en-route charges for March flights.
- ✘ This is **-13%** below the amount billed for the March 2019 flights.
- ✘ On a year-to-date basis, EUROCONTROL billed **1,354M€** which is **-17% vs 2019**



Jet Fuel Price Europe



Source: IATA/Platts

- ✘ Jet fuel prices averaged 348 cts/gallon in early April (-1% compared to 25 March 2022).
- ✘ Prices in 2022 increased by 31% compared to pre-war Ukraine level.

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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