

9 June 2022



EUROCONTROL

Comprehensive Assessment

EUROPEAN AVIATION



SUPPORTING EUROPEAN AVIATION



NETWORK
MANAGER



Headlines (Week of 02 – 08 June 2022)

- 29,027 daily flights on average over past week (+2% vs previous week); 85% of 2019 levels.
- Traffic in line with the base EUROCONTROL Traffic Scenarios (6 Apr 22): 86% for June vs 2019 so far.
- Ryanair was the busiest aircraft operator last week with 2,962 flights per day on average (+14% vs 2019), followed by easyJet (1,586; -15% vs 2019), Turkish (1,373; -5% vs 2019), Lufthansa (1,240; -20% vs 2019), Air France (1,071; -16% vs 2019), KLM (784; -16% vs 2019) and Wizz Air (749; +20% vs 2019).
- Domestic traffic vs 2019: Europe (-11%), USA (-17%), China (-58% - COVID) and Middle-East (-6%).
- Three European airports (Amsterdam, Istanbul IGA and Paris CDG) joined the Top10 Global airports.
- Increasing pressure on European airports which are dealing with staffing issues as passenger numbers increase, resulting in cancellations and delays
- En-route ATFM delays started to increase since end May, mainly due to capacity/staffing and weather.
- Jet fuel prices increased at 410 cts/gallon on 3 June (+16% over two weeks, +75% since early January).



Traffic Situation

Average daily flights (including overflights)

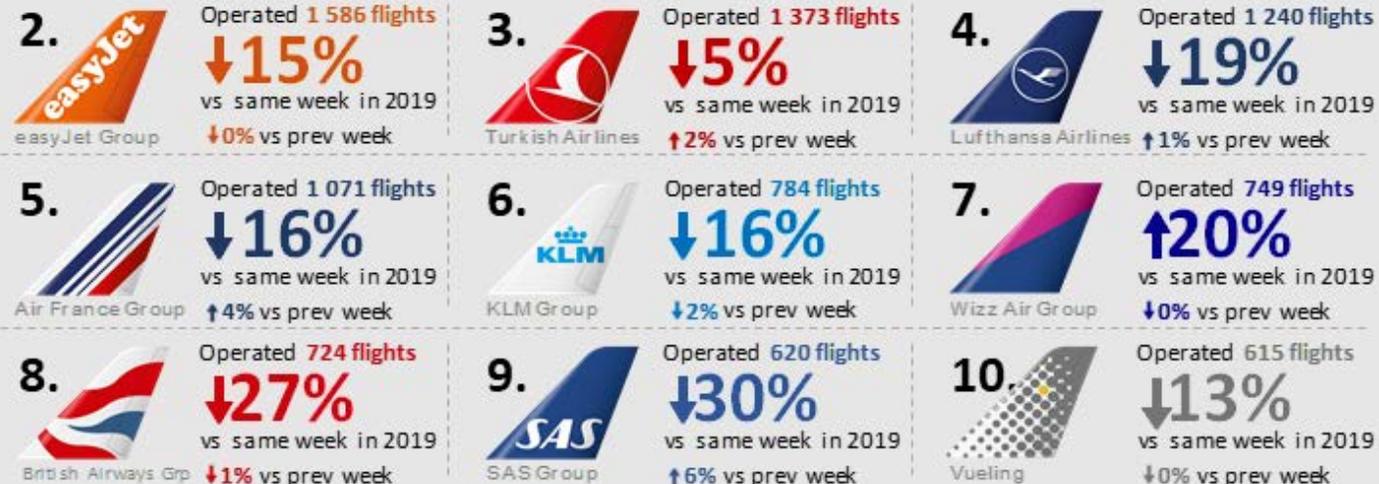
On week 02 - 08 Jun 2022

85%

of equivalent week in 2019

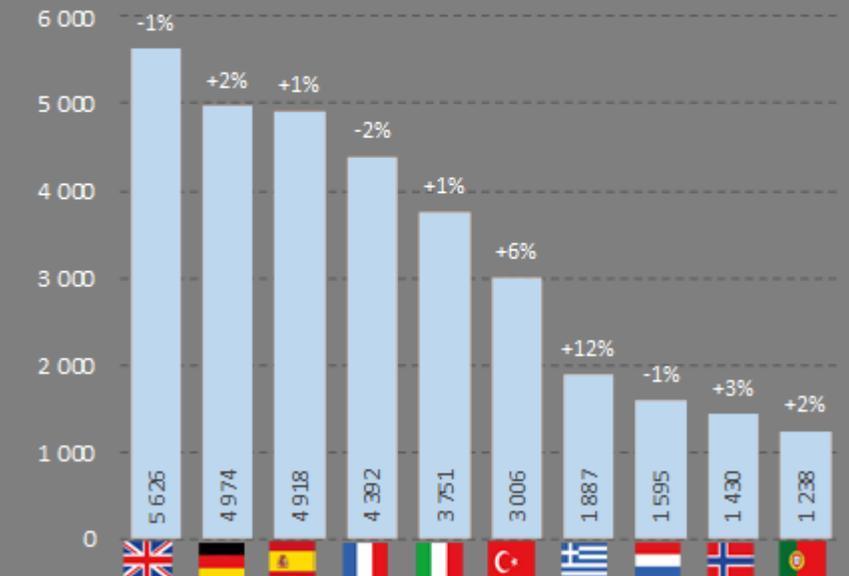
Top 10 Aircraft Operators

on Week 02 - 08 Jun 2022 (avg daily flights)

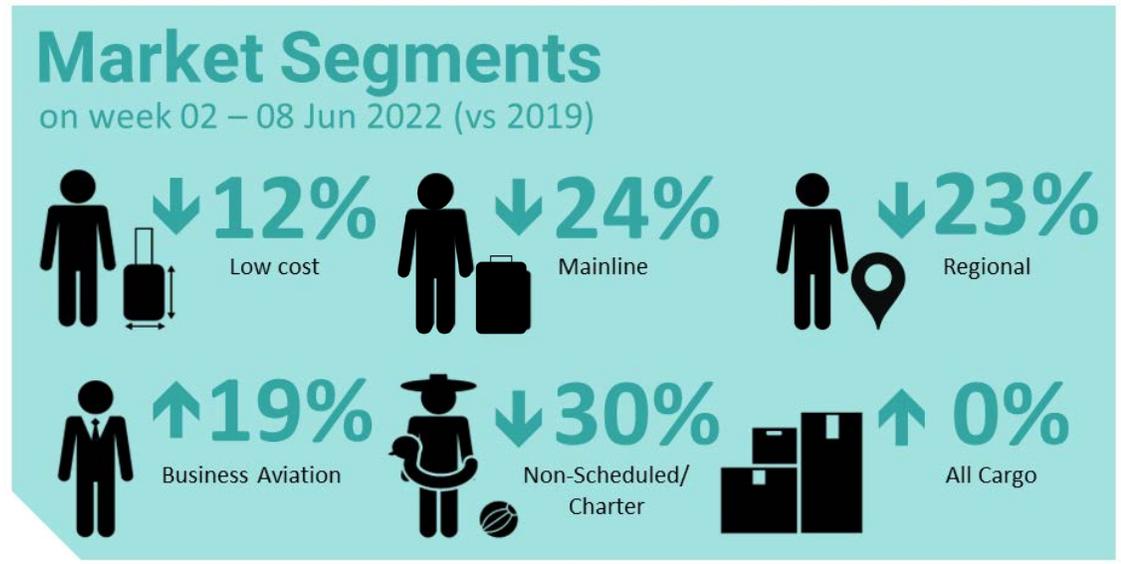
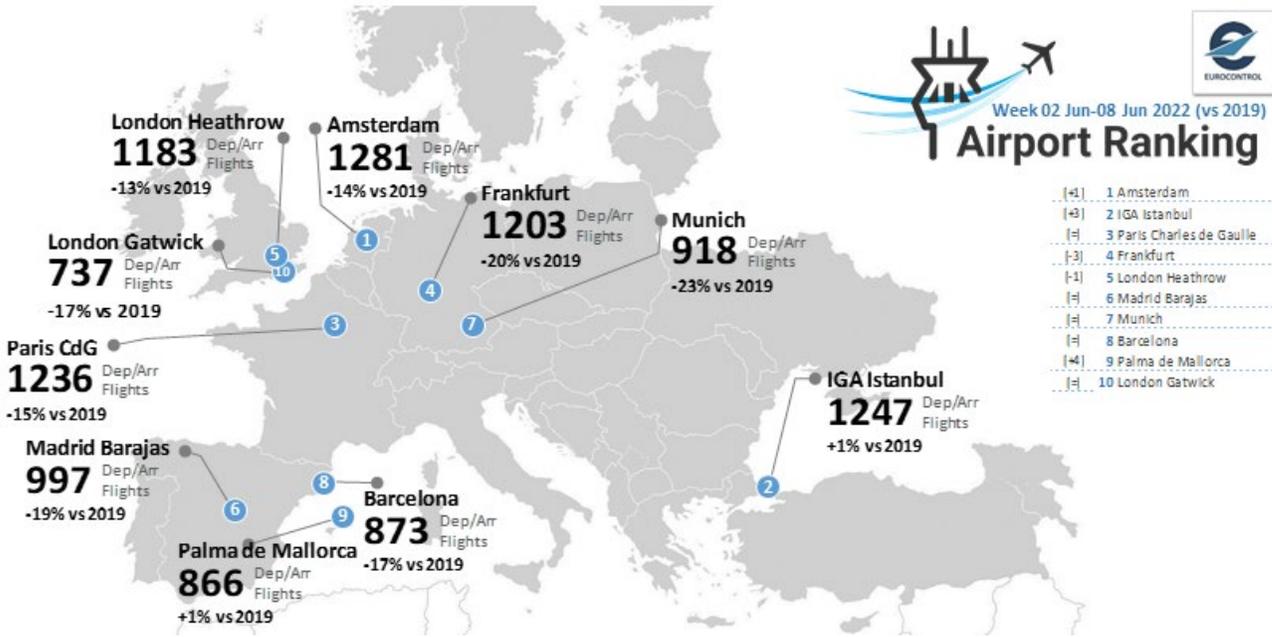


Top 10 Busiest States

on week 02 - 08 Jun 2022 (avg daily flights)
(Dep/Arr flights and comparison with previous week)



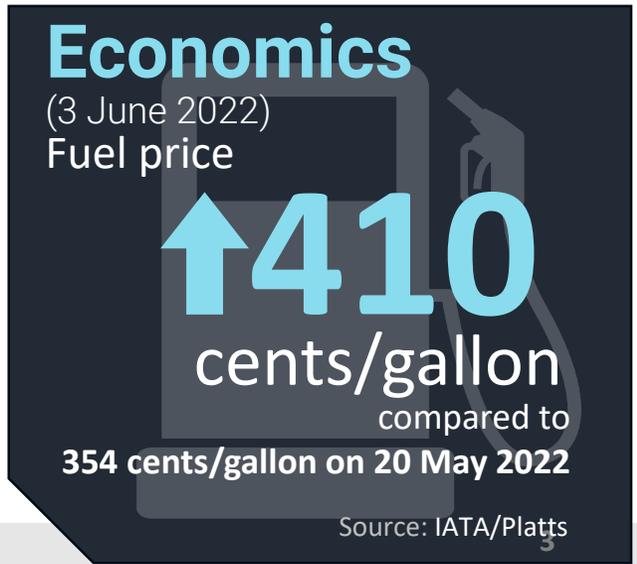
Top 10 Busiest Airports, Flows, Market segments & Fuel prices



Traffic Flow

Average daily flights on week of 02 - 08 Jun 2022

	Flights	vs previous week	vs 2019
Intra-European	23 637	+1%	-11%
Intercontinental	4 756	+4%	-30%



Airports

Extensive flight disruptions at some airport as a result of staff shortages



- ✘ **easyJet** makes advance cancellations affecting approx. 24 flights/day at **London Gatwick** between 28 May and 6 June.
- ✘ **British Airways Heathrow** check in staff to vote on industrial action in July.
- ✘ **UK Transport Minister** met with aviation leaders on 1 June to discuss disruptions, with ‘**thousands of flights cancelled due to staff shortages at airports and airlines**’.

- ✘ **Amsterdam Schiphol Airport** signed a labour agreement with unions on June.
- ✘ **Amsterdam Schiphol** only allowing passengers departing in <4 hours in to the departure hall and requesting passengers to “bring as little baggage as possible”.
- ✘ **Weather/runway maintenance** causes KLM to **cancel** flights at Amsterdam on Saturday 4 June in addition to the flights (up to 50/day) cancelled in advance.

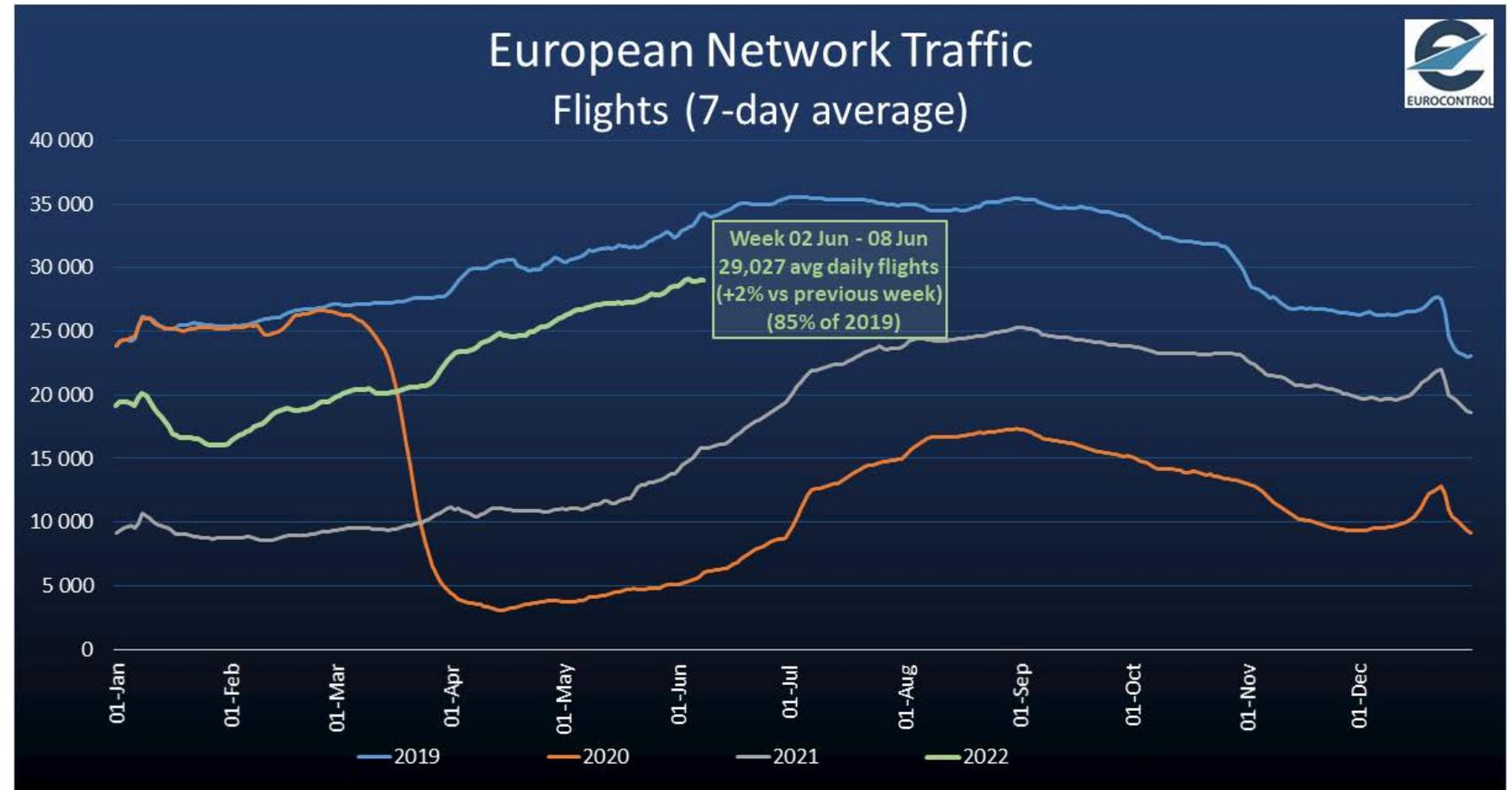
- ✘ **IATA DG Willie Walsh** comments that the **congestion** issues are due to an increase in the take for **processing security clearances** for new staff from 3-4 weeks to as long as 3 months.

- ✘ **Ryanair** CEO calls for UK to deploy army personnel at airports to relieve the pressure on airport security.

Overall traffic situation at network level

On week 2 – 8 June:

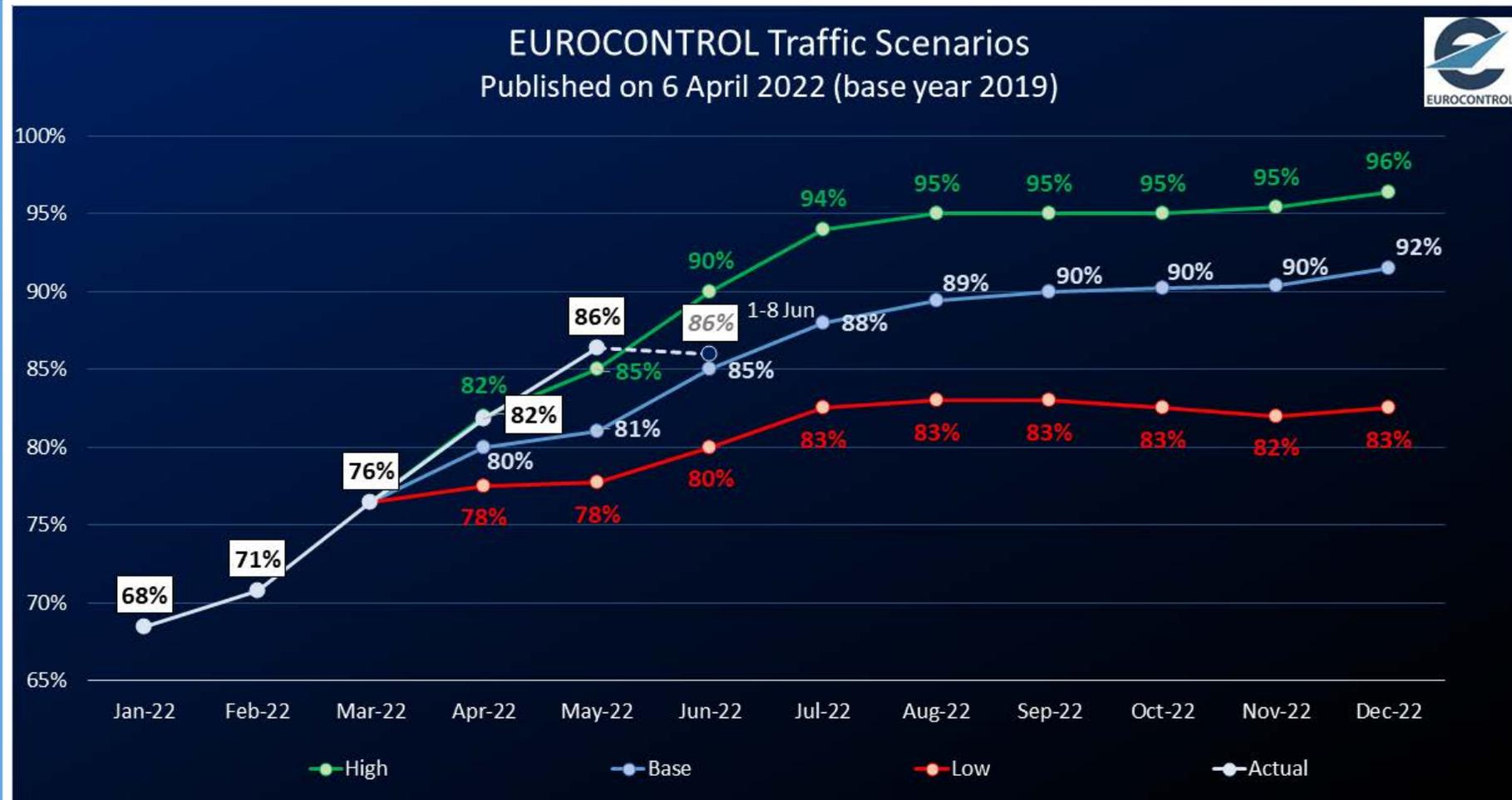
- ✂ **29,027** average daily flights.
- ✂ **+2%** on previous week.
- ✂ **85%** of 2019 traffic levels.
- ✂ Constant increase since mid April 2022.



Current situation compared to the latest EUROCONTROL traffic scenarios



- ✈ EUROCONTROL has published new traffic scenarios on 6 April 2022.
- ✈ For **May**, network traffic stood at **86% of 2019** levels, slightly above the high scenario.
- ✈ For the first 8 days of June, network traffic remains at 86% of 2019 levels, in line with the base scenario.
- ✈ On a year to date basis, network traffic in 2022 stands at **78%** of 2019.





Market Segments

Market segments in EUROCONTROL Network
(compared with equivalent days in 2019)
7-day moving average (Flights)



Up until the 8th of June 2022, compared to 2019:

- ✘ Two segments are above or at 2019 levels: **All-cargo (+0%)** and **Business Aviation (+19%)**.
- ✘ **Low-Cost (-12%)** recorded a continuous increase since the beginning of 2022, but stagnates over the past 2 weeks.
- ✘ **Charter (-30%)** decrease mainly since the start of the Russian invasion of Ukraine.
- ✘ **Mainline (-23%)** and **Regional (-23%)** continued to catch up vs 2019 since the beginning of 2022, remaining stable over the recent weeks.

Note: a new Segment “Regional” has been created by selecting commercial flights operated by aircraft types between 19 and 120 seats.

Aircraft operators (Average daily flights for the last week)



Top 10

Top 10 Aircraft Operators	Week (02 - 08 Jun 2022)		
	Average flights per day	% vs 2019	% over previous week
RYANAIR	2 962	+14%	+2%
easyJet	1 586	-15%	-0%
TURKISH AIRLINES	1 373	-5%	+2%
Lufthansa	1 240	-19%	+1%
AIRFRANCE	1 071	-16%	+4%
KLM Royal Dutch Airlines	784	-16%	-2%
Wizz	749	+20%	-0%
BRITISH AIRWAYS	724	-27%	-1%
Scandinavian Airlines	620	-30%	+6%
vueling	615	-13%	-0%

✘ **Ryanair** is the busiest Aircraft Operator with 2,962 flights per day on average over last week, followed by **easyJet** (1,586), **Turkish Airlines** (1,373), **Lufthansa** (1,240), **Air France** (1,071), **KLM** (784) and **Wizz Air** (749).

✘ The rankings remained unchanged compared with previous week.

Within the top 10, **5 airlines** posted **increases** over the previous week, highest being:

- ✘ **Ryanair** (+68 flights; +2%) mainly due (by far) to Greece-Italy, then Greece-Poland, domestic Spain.
- ✘ **Smartwings** (+38 flights; +35%) mainly due to (by far) Czechia-Greece, then Bulgaria-Czechia, Czechia-Tunisia and Greece-Poland.
- ✘ **Air France** (+837 flights; +4%) mainly due to (by far) domestic, then France-Germany, France-Italy.

Main decreases for:

- ✘ **KLM** (-18 flights; -2%) mainly due to Germany-Netherlands, Netherlands-Spain, Denmark-Netherlands, Netherlands-UK.
- ✘ **Iberia** (-17 flights; -5%) mainly due to (by far) France-Spain, then Argentina-Spain, Netherlands-Spain.
- ✘ **NetJets** (-16 flights; -7%) mainly due to France-UK, domestic UK and domestic France.

Aircraft operators (Average daily flights for the last week)

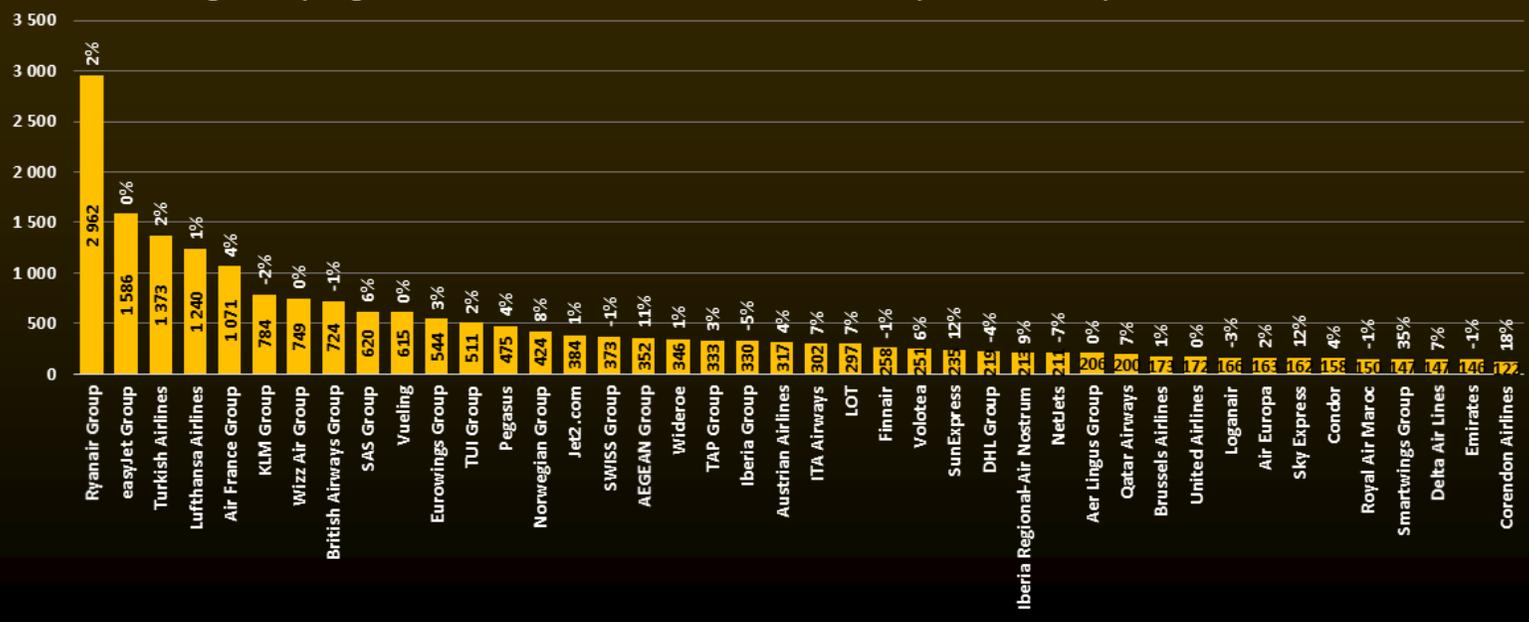
Top 40



Aircraft Operators in EUROCONTROL Network
(compared with equivalent week in 2019)
IFR Flights for Week 02 - 08 Jun 2022

Aircraft operators

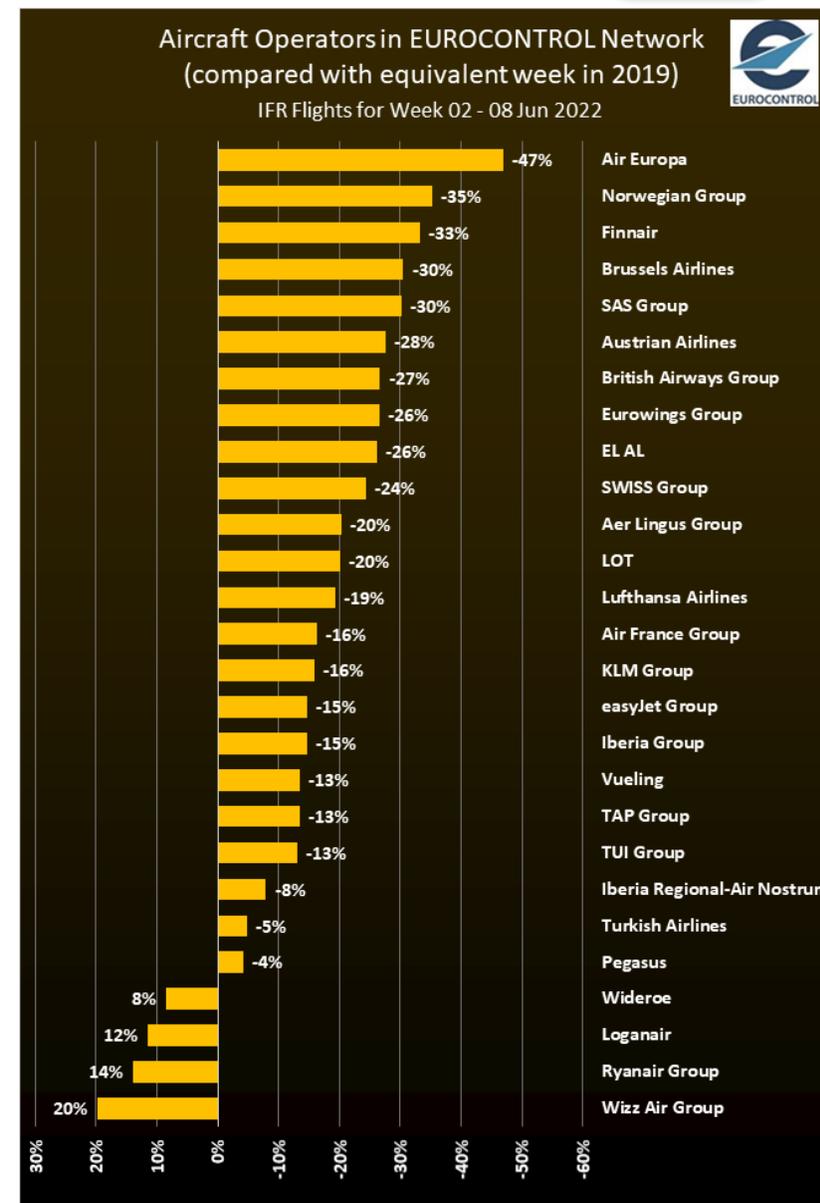
Average daily flights for week 02 - 08 Jun 2022 and comparison with previous week



✘ Largest increases in flights vs previous week for **Ryanair (+2%)**, **Smartwings (+35%)**, **Air France (+4%)**, **Aegean (+11%)**, **SAS (+6%)**, **Norwegian (+8%)**, **Turkish Airlines (+2%)**, **Sun Express (+12%)**, **LOT (+7%)** and **Corendon (+18%)**.

✘ Highest decreases for **KLM (-2%)**, **Iberia (-5%)** and **NetJets (-7%)**.

✘ Traffic levels ranging from **-47% (Air Europa)** to **+20% (Wizz Air)** 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 2 - 8 June 2022



PERFORMANCE OF MAJOR LONG-HAUL/LEGACY CARRIERS

for the week 2 - 8 June 2022



PERFORMANCE OF MAJOR LOW-COST CARRIERS

for the week 2 - 8 June 2022



PERFORMANCE OF MAJOR REGIONAL CARRIERS*

for the week 2 - 8 June 2022



*REGIONAL AIRLINES USING SEPARATE IATA CODES

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



Top 10 States

on week 02 - 08 Jun 2022 (avg daily dep/arr)

1.  United Kingdom	5 626 flights ↓15% vs same week in 2019 ↓1% vs prev week
2.  Germany	4 974 flights ↓19% vs same week in 2019 ↑2% vs prev week
3.  Spain	4 918 flights ↓8% vs same week in 2019 ↑1% vs prev week
4.  France	4 392 flights ↓10% vs same week in 2019 ↑2% vs prev week
5.  Italy	3 751 flights ↓10% vs same week in 2019 ↑1% vs prev week
6.  Turkey	3 006 flights ↓11% vs same week in 2019 ↑6% vs prev week
7.  Greece	1 887 flights ↑0.2% vs same week in 2019 ↑12% vs prev week
8.  Netherlands	1 595 flights ↓12% vs same week in 2019 ↓1% vs prev week
9.  Norway	1 430 flights ↓4% vs same week in 2019 ↑3% vs prev week
10.  Portugal	1 238 flights ↓1% vs same week in 2019 ↑2% vs prev week

✘ **UK** is the State with the highest number of dep/arr flights on average over last week (5,626) followed by **Germany** (4,974), **Spain** (4,918), **France** (4,392) and **Italy** (3,751).

✘ The rankings remained unchanged compared with the previous week.

Within the top 10, **all but three** States posted flight increases over the previous week, amongst which:

- ✘ **Greece** (+206 flights; +12%): Ryanair, Sky Express, Olympic and Aegean. Domestic flows as well as flows with Italy, Poland and Germany.
- ✘ **Turkey** (+169 flights; +6%): Mainly Turkish Airlines, Sun Express, light AOs and Corendon. Flows with Germany, domestic flows, flows with Russia and UK.
- ✘ **Germany** (+88 flights; +2%): Mainly Lufthansa, Turkish Airlines and Sun Express. Flows with Turkey, Spain, Greece and domestic flows.
- ✘ **Poland** (+79 flights; +7%): Mainly LOT, light AOs, Buzz and Enter Air. Flows with Greece, Turkey and domestic flows.

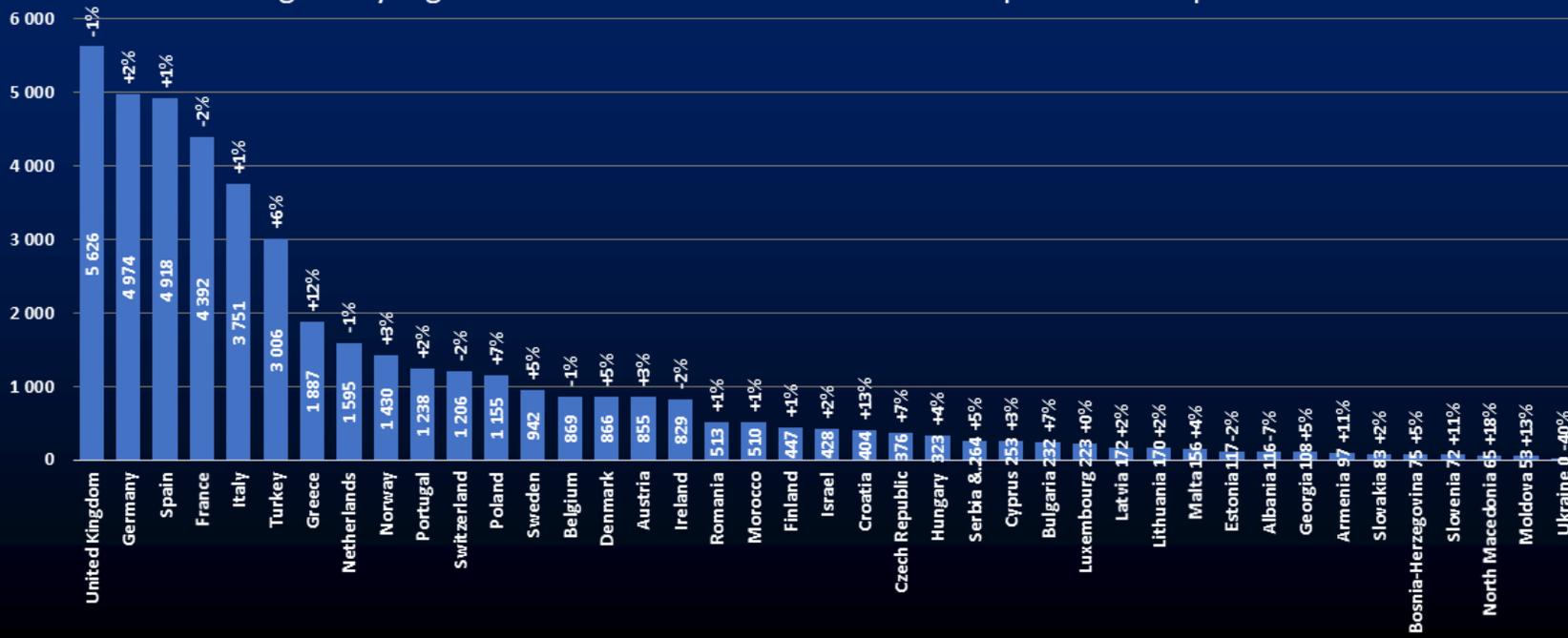
States (Average Daily Departure/Arrival flights for the last week)

Top 40



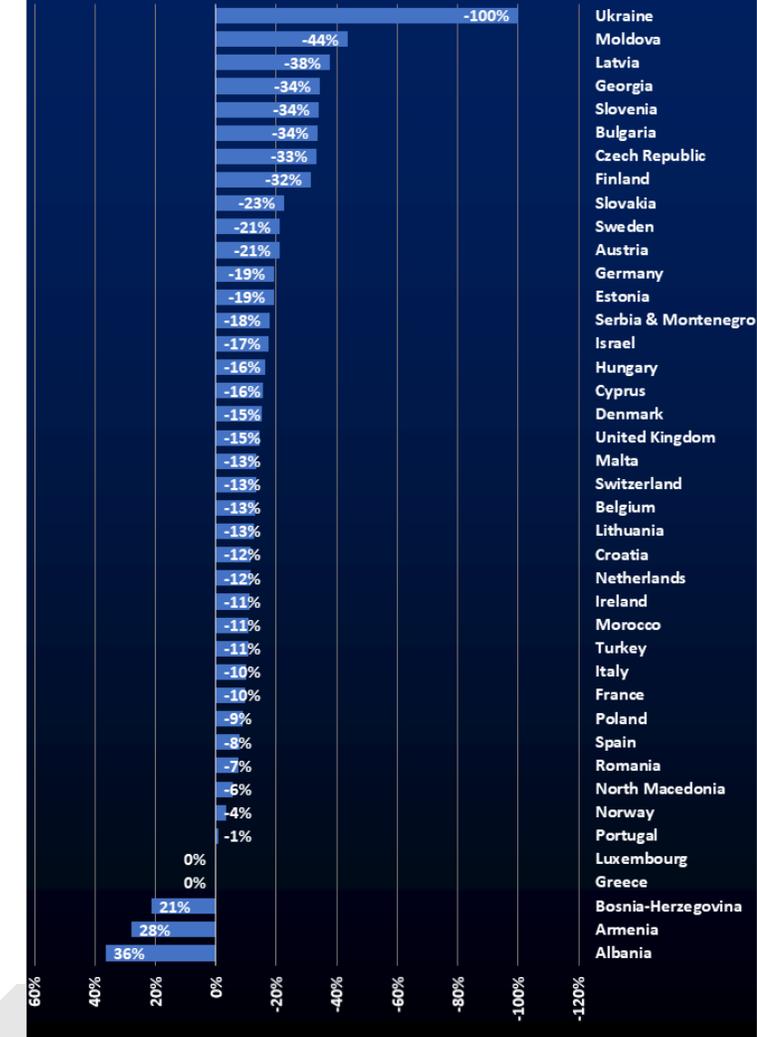
States (Dep/Arr flights)

Average daily flights for week 02 - 08 Jun 2022 and comparison with previous week



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

IFR Dep/Arr Flights for Week 02 - 08 Jun 2022

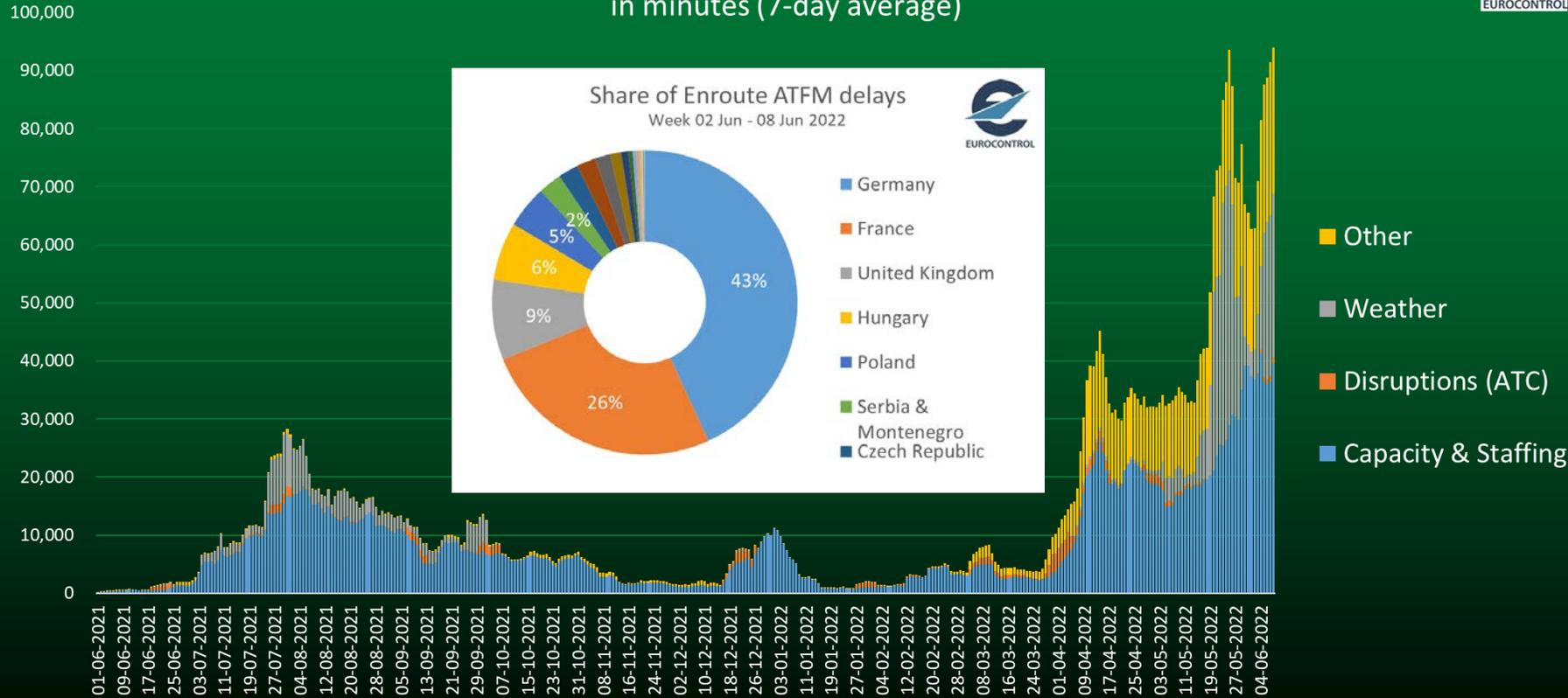


- ✘ Highest increases in flights vs previous week for **Greece (+12%)**, **Turkey (+6%)**, **Germany (+2%)**, **Poland (+7%)**, **Sweden (+5%)**, **Croatia (+13%)**, **Norway (+3%)** and **Denmark (+5%)**.
- ✘ Highest decreases for **France (-2%)**, **UK (-1%)** and **Switzerland (-2%)**.
- ✘ Traffic levels ranging from **-100% (Ukraine)** to **+36% (Albania)**, compared to 2019.

En-route ATFM delays



Enroute ATFM Delays (EUROCONTROL Area)
in minutes (7-day average)



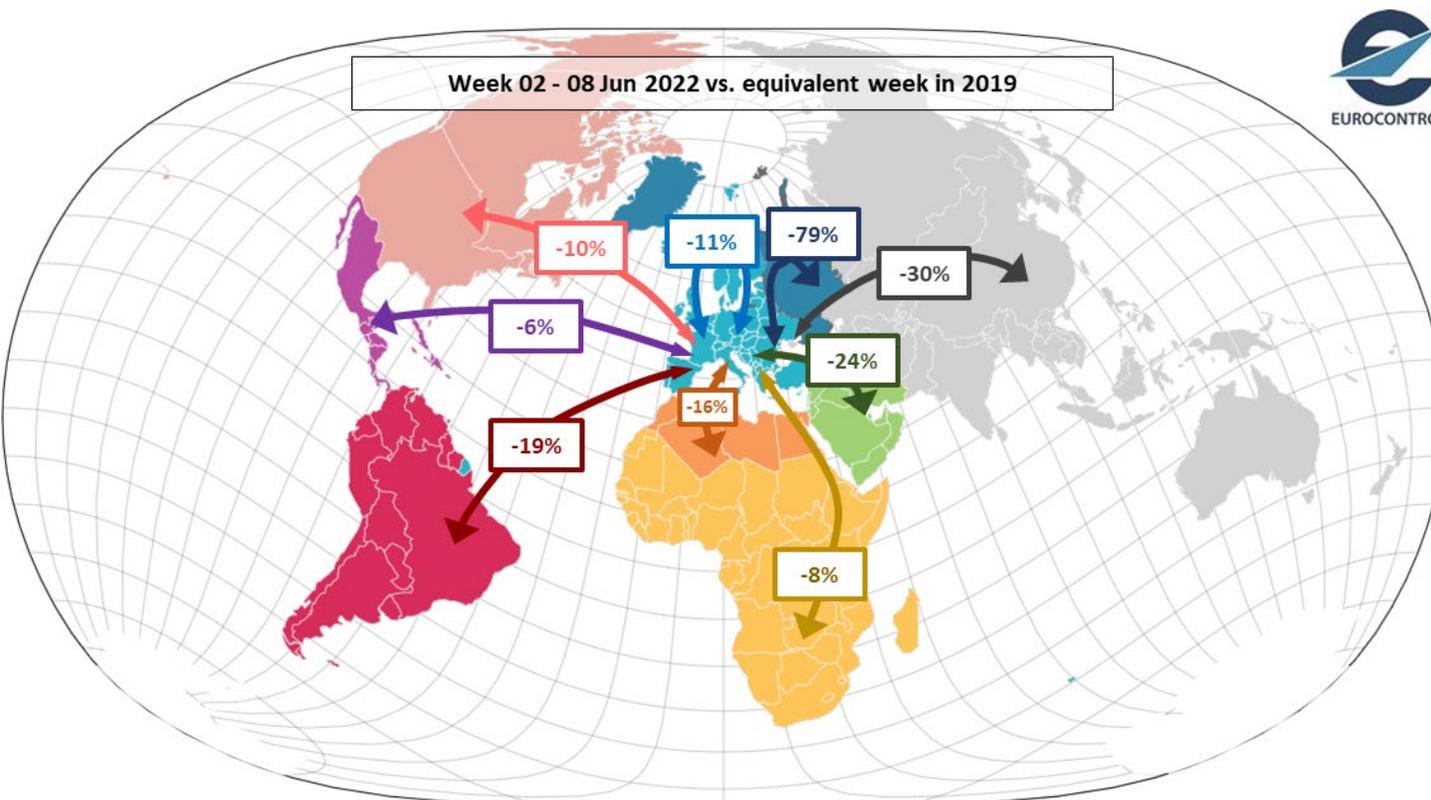
✘ En-route ATFM delays have started to rise since end May 2022.

✘ Major contributors over the last 7 days: **Germany** (43% of all en-route ATFM delays), **France** (26%), **UK** (9%), **Hungary** (6%) and **Poland** (5%).

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

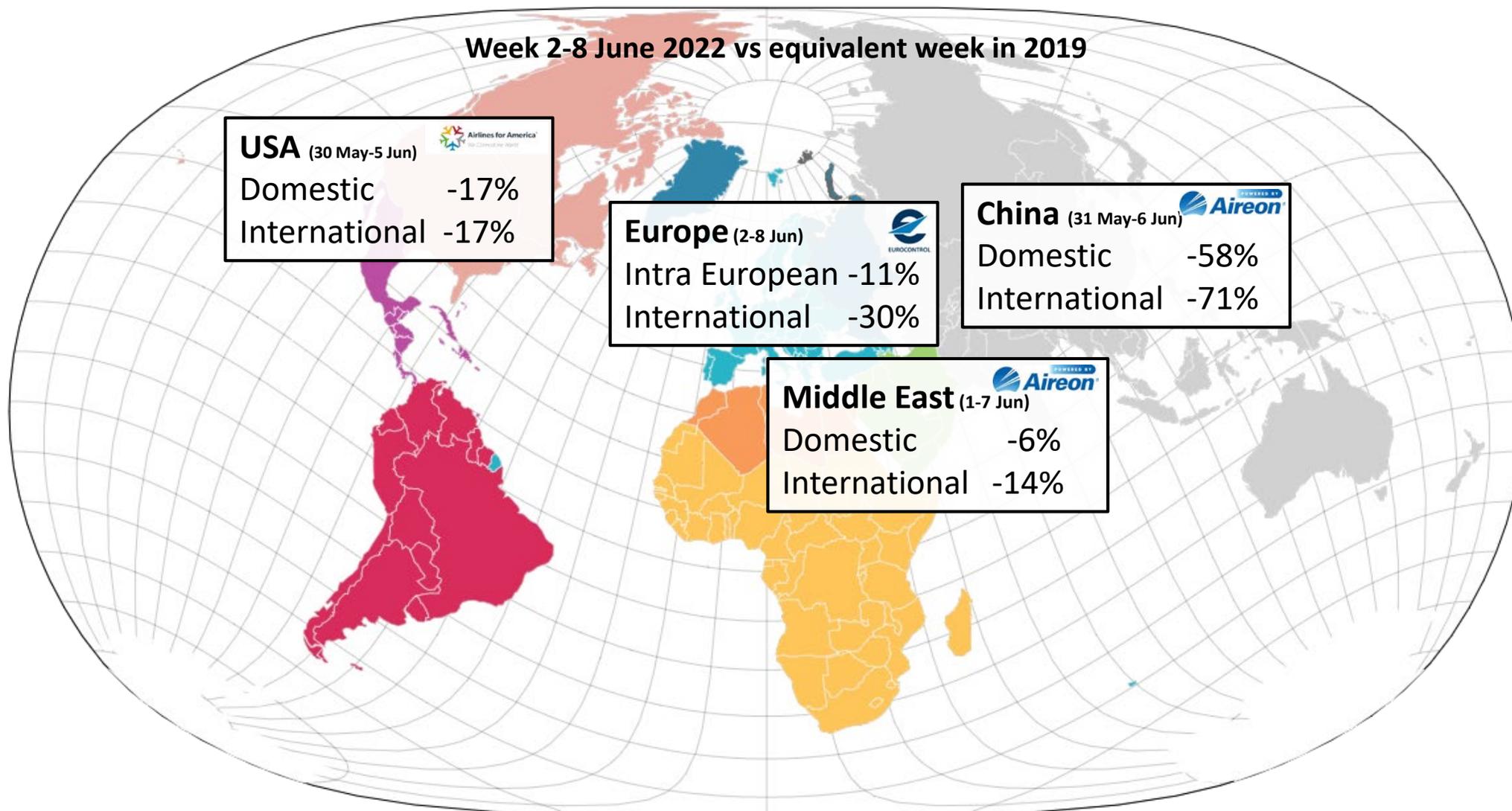


- ✘ The main traffic flow is the intra-Europe flow with 23,637 flights on average the most recent week, increasing by 1% over the previous week.
- ✘ Flows between Europe and Other Europe (incl. Russia) are at -79% compared to 2019.
- ✘ Important lockdown in China, owing to a surge in COVID-19 cases is affecting Chinese domestic flows (next slide).
- ✘ Intra-Europe flights are at -11% compared to 2019 while intercontinental flows are at -30%.



REGION (Average daily flights)	Week 26/05/2022 - 01/06/2022	Week 02/06/2022 - 08/06/2022	%	vs. 2019
Intra-Europe	23 312	23 637	+1%	-11%
Europe<->Asia/Pacific	526	558	+6%	-30%
Europe<->Mid-Atlantic	151	145	-4%	-6%
Europe<->Middle-East	1 144	1 182	+3%	-24%
Europe<->North Atlantic	1 252	1 297	+4%	-10%
Europe<->North-Africa	851	871	+2%	-16%
Europe<->Other Europe	265	287	+9%	-79%
Europe<->South-Atlantic	146	149	+2%	-19%
Europe<->Southern Africa	257	265	+3%	-8%
Non Intra-Europe	4 591	4 756	+4%	-30%

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 02 - 08 Jun 2022				
	Airport-Pair	Avg daily flights	Δ vs prev. week	% vs prev. week	% vs 2019
→	London/Heathrow <-> New York JFK	36	↓ -1	-3%	↓ -10%
→	London/Heathrow <-> Los Angeles	18	→ +0	+0%	→ +0%
→	Paris/Charles-De-Gaulle <-> New York JFK	18	→ +0	+2%	↑ +31%
→	London/Heathrow <-> Newark	17	↑ +1	+9%	↑ +8%
→	London/Heathrow <-> Chicago O Hare Intl	17	↑ +1	+8%	↓ -6%
→	London/Heathrow <-> Dubai	14	→ +0	+1%	↓ -17%
↓	London/Heathrow <-> Boston	14	→ -1	-5%	↓ -3%
→	London/Heathrow <-> San Francisco	13	→ +0	+3%	↑ +15%
↑	Madrid/Barajas <-> Bogota Intl/Eldorado	12	→ -0	-1%	↑ +19%
↓	Frankfurt <-> Seoul/Inchon INTL	11	↓ -1	-9%	↑ +31%
↑	Frankfurt <-> New York JFK	11	→ +0	+0%	↑ +25%
↑	London/Heathrow <-> Delhi	11	↑ +2	+16%	↑ +10%
↑	Paris/Charles-De-Gaulle <-> Montreal/Dorval	11	→ +1	+9%	↑ +4%
↓	London/Heathrow <-> Washington	11	→ -0	-1%	↓ -10%
↓	Frankfurt <-> Chicago O Hare Intl	10	↓ -2	-13%	↓ -8%
→	London/Heathrow <-> Hamad INTL	10	→ -0	-1%	↓ -27%
↑	Milan/Malpensa <-> New York JFK	10	→ +1	+6%	↑ +1%
↓	Rome/Fiumicino <-> New York JFK	10	→ -0	-1%	→ +0%
↑	London/Heathrow <-> Singapore/Changi	10	↑ +2	+21%	↓ -29%
↓	Amsterdam <-> New York JFK	10	→ +0	+0%	↓ -19%

Within the top 20, most long-haul airport pairs remained stable on previous week.

Slight changes over the last week with:

Increases for:

- ✘ London Heathrow – New Delhi (+2 flights)
- ✘ London Heathrow – Singapore (+2 flights)
- ✘ London Heathrow – Newark (+1 flight)
- ✘ London Heathrow – Chicago (+1 flight)

Decreases for:

- ✘ Frankfurt – Chicago O Hare (-2 flights)
- ✘ Frankfurt – Seoul (-1 flight)
- ✘ London Heathrow – New York JFK (-1 flight)

Country pairs (Average Daily flights for the last week)

Top 10



Rank evolution over prev. week	Top 10 Country-Pair on week 02 - 08 Jun 2022				
	Country-Pair	Avg daily flights	Δ vs prev. week	% vs prev. week	% vs 2019
→	Spain <-> Spain	1 220	→ -1	-0%	↘ -5%
→	France <-> France	1 066	↗ +29	+3%	↘ -10%
↗	Spain <-> United Kingdom	918	↗ +14	+2%	↘ -7%
↘	Italy <-> Italy	913	↘ -13	-1%	↘ -3%
↗	Turkey <-> Turkey	840	↗ +12	+1%	↘ -18%
↗	Norway <-> Norway	818	↗ +7	+1%	↗ +4%
↘	United Kingdom <-> United Kingdom	803	↘ -38	-5%	↘ -25%
→	Germany <-> Germany	638	↗ +8	+1%	↘ -30%
→	Germany <-> Spain	591	↗ +16	+3%	↘ -7%
↗	Greece <-> Greece	424	↗ +42	+11%	↘ -2%

Seven of the top 10 flows are domestic.

✘ **Spain-Spain** is the country-pair with the highest number of dep/arr flights (1,220) followed by **France-France** (1,066), **Spain-UK** (918), **Italy-Italy** (913), **Turkey-Turkey** (840), **Norway-Norway** (818), **UK-UK** (803) and **Germany-Germany** (638).

✘ **Spain-UK**, **Turkey-Turkey**, **Norway-Norway** and **Greece-Greece** ranks are higher this week compared with the previous week. **Italy-Italy** and **UK-UK** lost a few ranks this week compared with the previous week.

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

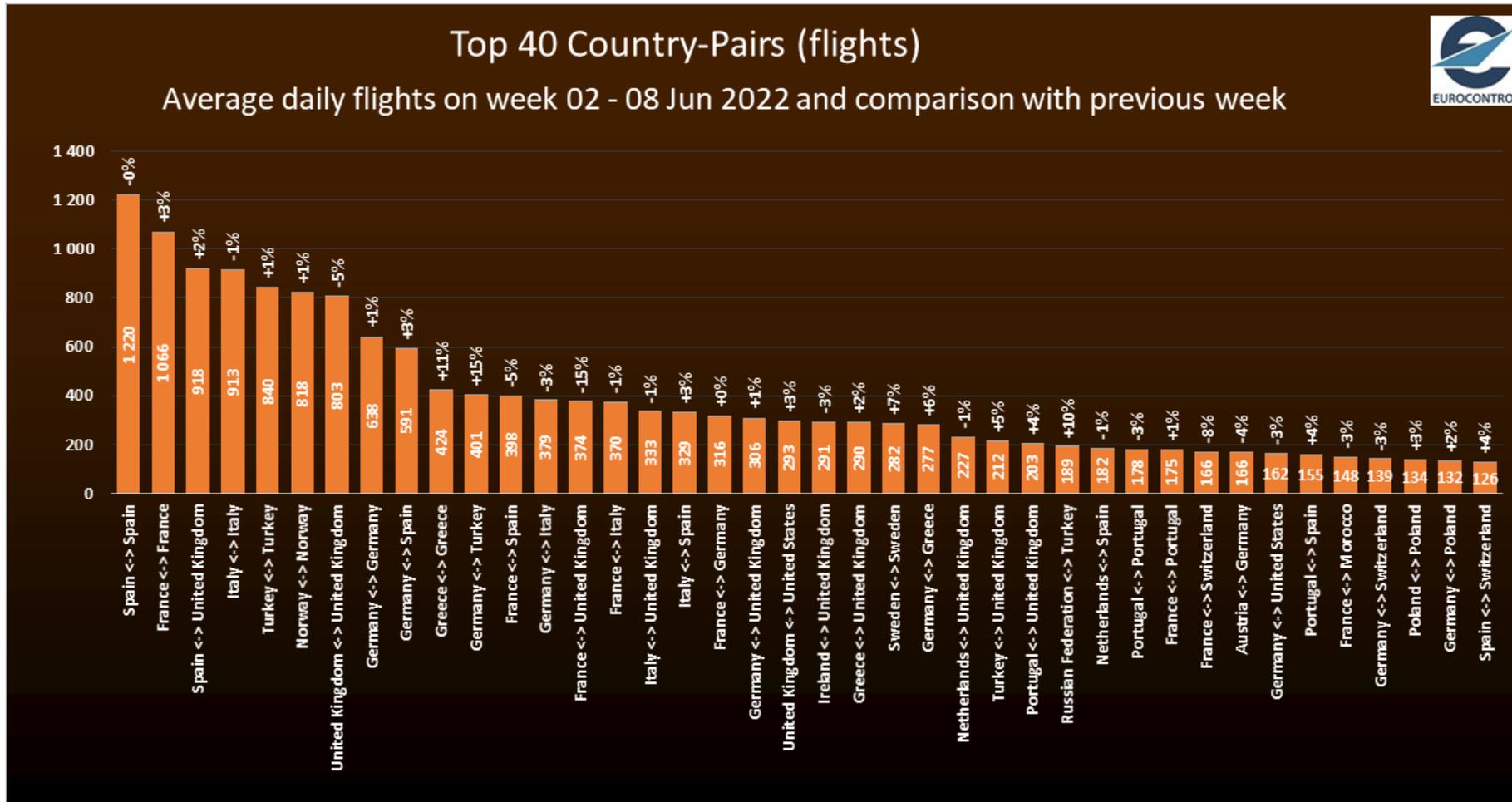
- ✘ **Greece-Greece** (+42 flights; +11%) mainly due to Sky Express, Olympic and Aegean.
- ✘ **France-France** (+29 flights; +3%): mainly due to Air France, French Air Force and light AOs.
- ✘ **Germany-Spain** (+16 flights; +3%): mainly due to Lufthansa, Condor and Air Nostrum.
- ✘ **Spain-UK** (+14 flights; +2%): mainly due to light AOs, British Airways, easyJet and TUI.

Decreases for:

- ✘ **France-UK** (-64 flights; -15%): mainly due to light AOs.
- ✘ **UK-UK** (-38 flights; -5%): mainly due to light AOs and West Atlantic UK.

Country pairs (Average Daily flights for the last week)

Top 40



✘ Highest increase in flights vs previous week for **Germany-Turkey (+15%)**, **Greece-Greece (+11%)**, **France-France (+3%)**, **Sweden-Sweden (+7%)**, **Russia-Turkey (+10%)**, **Germany-Greece (+6%)**, **Germany-Spain (+3%)** and **Spain-UK (+2%)**.

✘ Highest decrease in flights vs previous week for **France-UK (-15%)** and **UK-UK (-5%)**.

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



Top 10

Rank evolution over prev. Week	Top 10 Airports on week 02 Jun - 08 Jun 2022				
	Airport	Average Daily Dep/Arr Flights	Δ over prev. week	% over prev. week	% vs 2019
→	Amsterdam	1 281	↘ -9	-1%	↘ -14%
↗	IGA Istanbul Airport	1 247	↗ +19	+2%	↗ +1%
↘	Paris/Charles-De-Gaulle	1 236	↘ -22	-2%	↘ -15%
→	Frankfurt	1 203	↗ +4	+0%	↘ -20%
→	London/Heathrow	1 183	↗ +29	+2%	↘ -13%
→	Madrid/Barajas	997	↘ -15	-1%	↘ -19%
→	Munich	918	↗ +37	+4%	↘ -23%
→	Barcelona	873	↗ +13	+1%	↘ -17%
→	Palma De Mallorca	866	↗ +12	+1%	↗ +1%
→	London/Gatwick	737	↗ +3	+0%	↘ -17%

✘ **Amsterdam** is the airport with the highest number of dep/arr flights (1,281) followed by **IGA Istanbul** (1,247), **Paris CDG** (1,236), **Frankfurt** (1,203) and **London Heathrow** (1,183).

✘ The ranking has increased for **Istanbul IGA** and decreased for **Paris CDG**.

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

- ✘ **Munich** (+37 flights; +4%): mainly due to Tailwind Airlines and Sun Express.
- ✘ **London Heathrow** (+29 flights; +2%): mainly due to British Airways, Air Canada and American Airlines.
- ✘ **Istanbul IGA** (+19 flights; +2%): mainly due Turkish Airlines, Indi Go and Red Wings. Domestic flows and flows with Kuwait, Iran and India.

Main decreases for:

- ✘ **Paris CDG** (-22 flights; -2%): mainly due to Iberia, Vueling and light AOs, on flows with Spain, UK and domestic flows.
- ✘ **Madrid** (-15 flights; -1%): mainly due to Iberia, on flows with France and domestic flows.

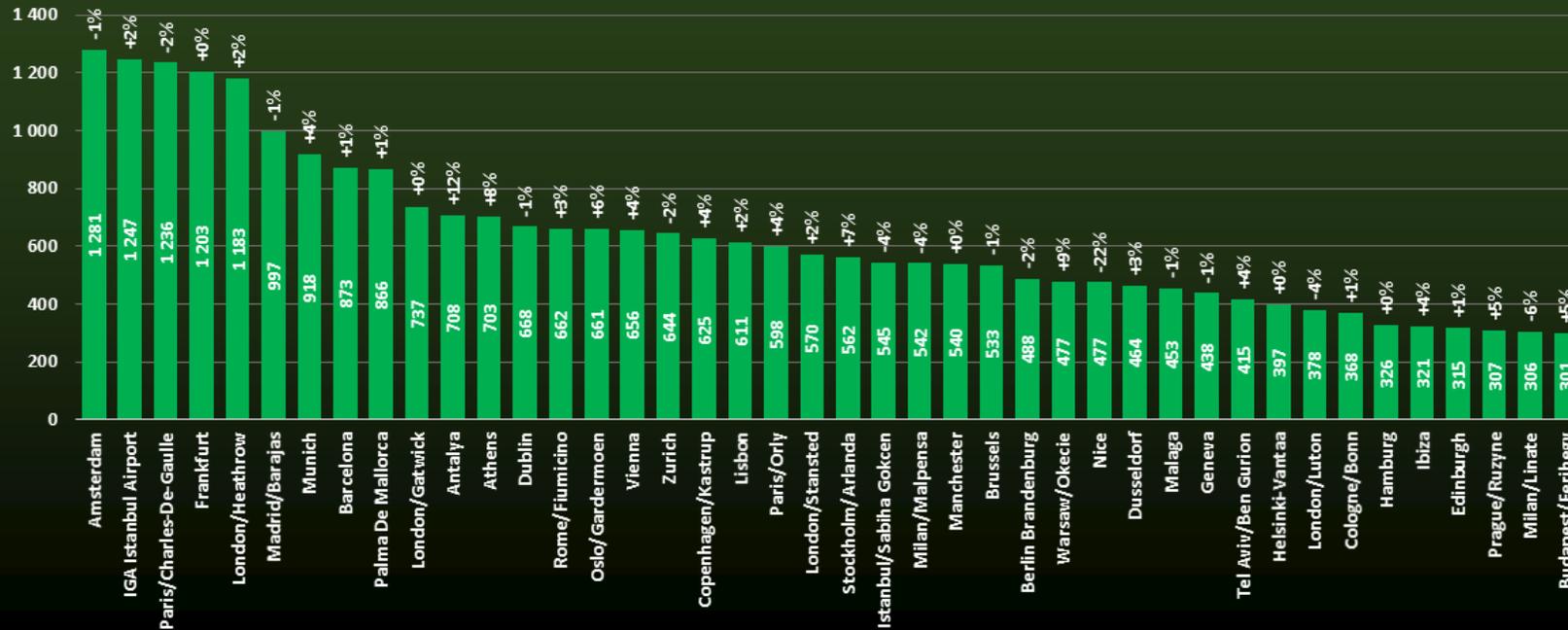
Airports (Average Daily Departure/Arrival flights for the last week)

Top 40



Top 40 Airports (Dep/Arr flights)

Average daily flights for week 02 - 08 Jun 2022 and comparison with previous week

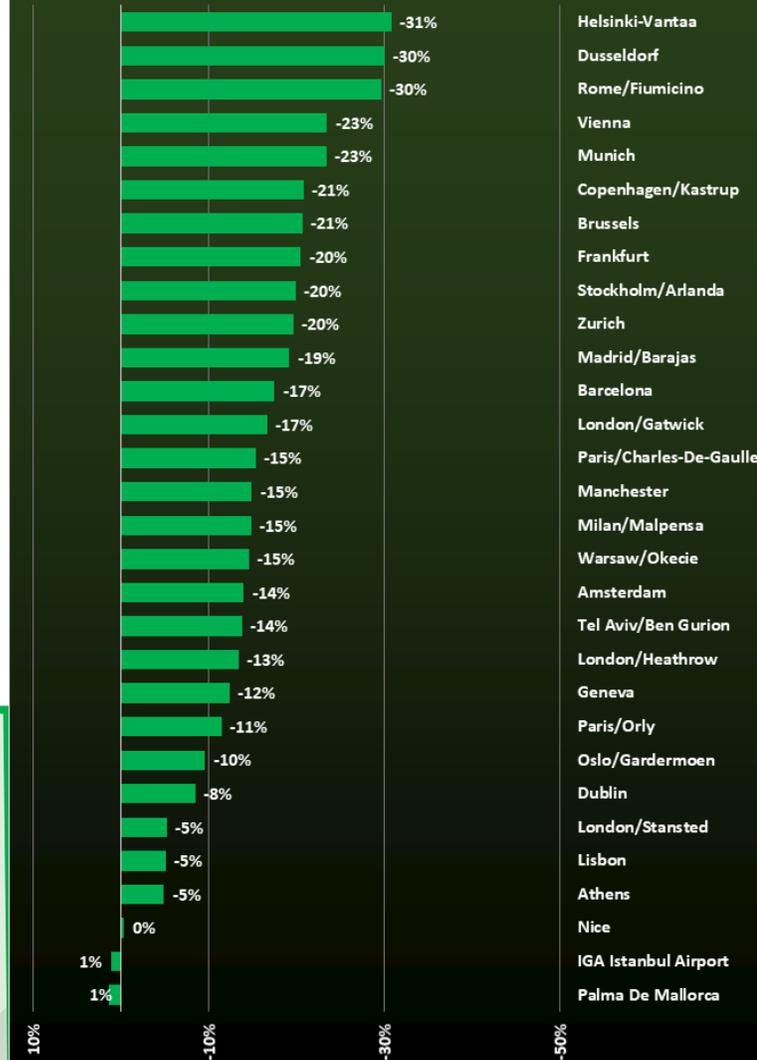


- ✘ Highest increases in flights vs the previous week for **Antalya (12%)**, **Athens (+8%)**, **Warsaw (+0%)**, **Stockholm (+7%)**, **Munich (+4%)**, **Oslo (+6%)**, **London Heathrow (+2%)**, **Vienna (+4%)**, **Rome Fiumicino (+3%)** and **Copenhagen (+4%)**.
- ✘ Highest decreases for **Nice (-22%)**, **Milan Malpensa (-4%)** and **Istanbul Sabiha (-4%)**.
- ✘ Traffic levels ranging from -31% (Helsinki) to +1% (Palma de Mall.) compared to 2019.

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



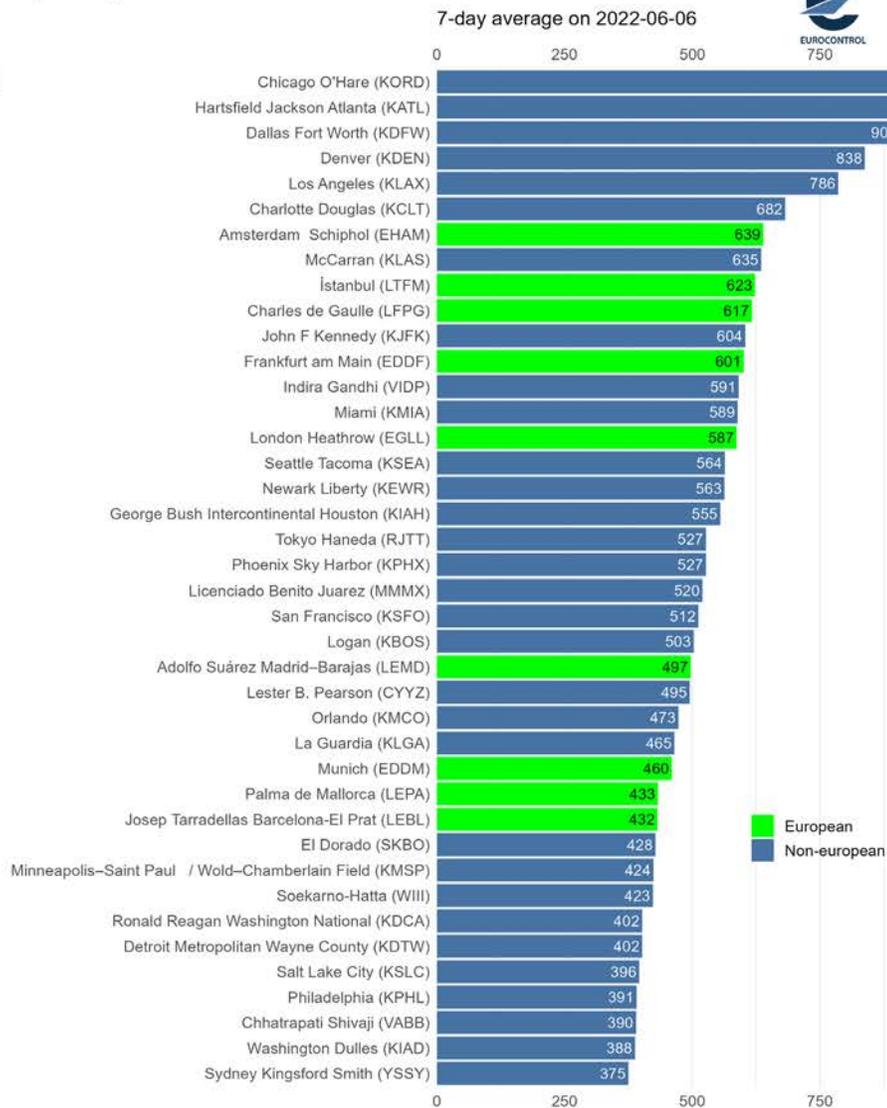
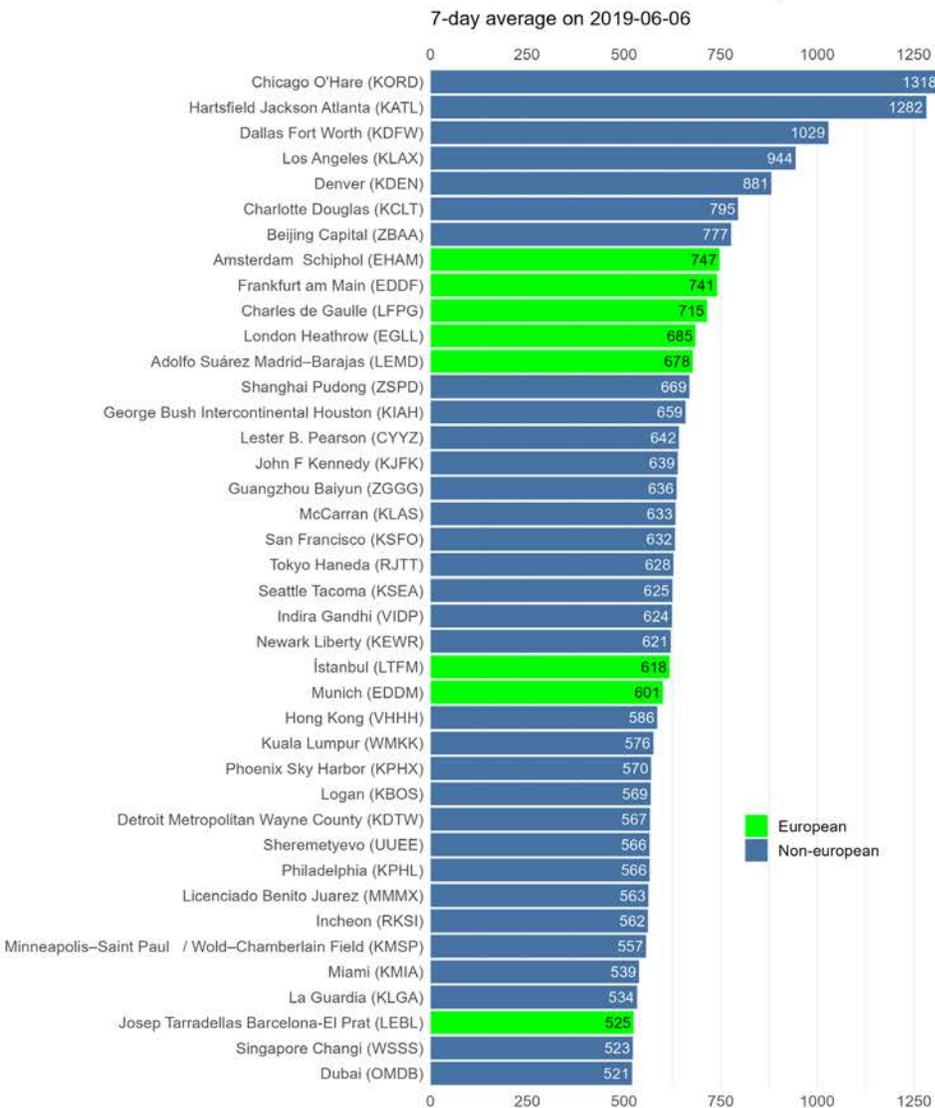
IFR Dep/Arr Flights for Week 02 - 08 Jun 2022



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):

✘ **Nine European airports** are ranked in the **Top 40** global airports (vs eight)

✘ **Three European airports** are in the Top 10: Amsterdam (7th), Istanbul IGA (9th), and Paris CDG (10th).

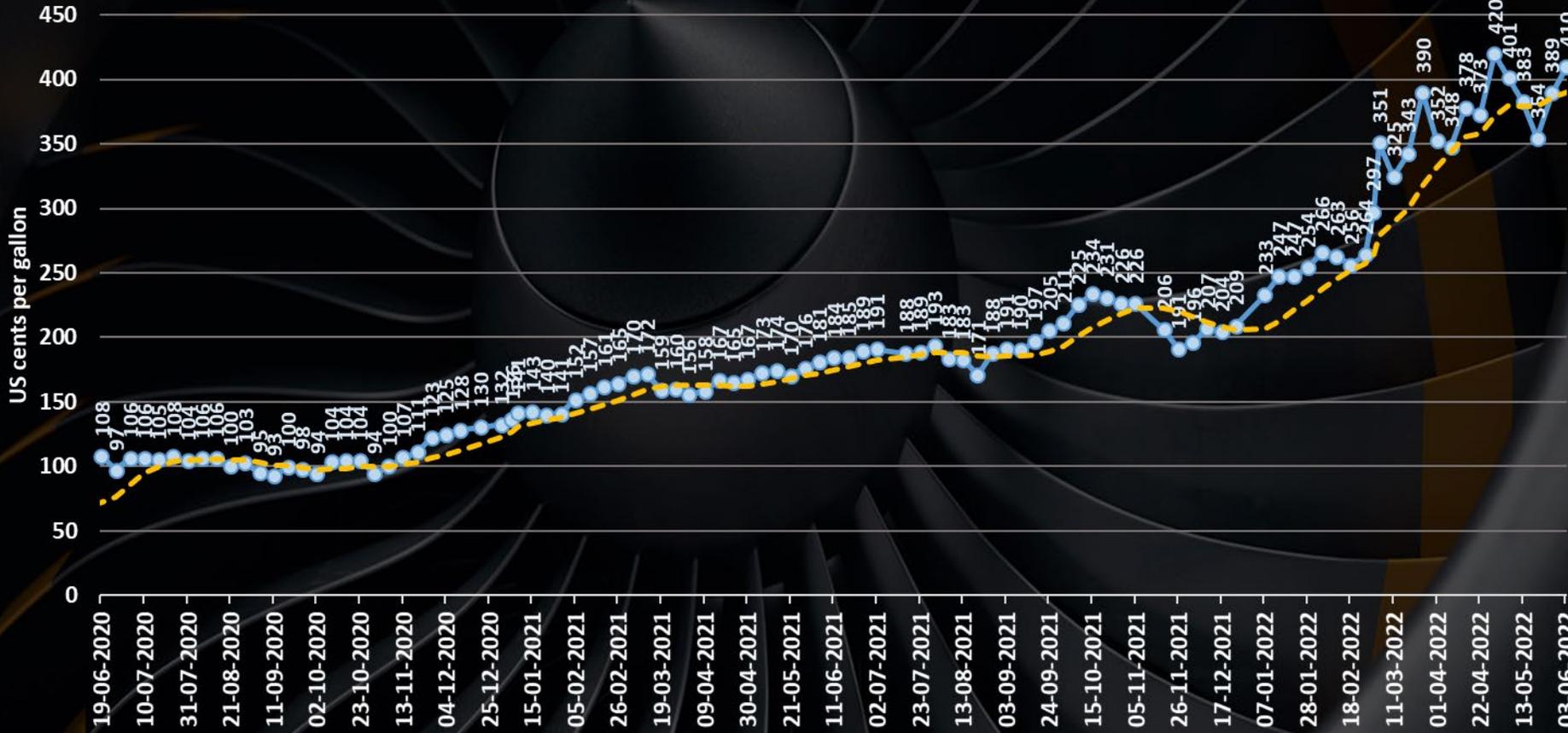
✘ Frankfurt and London Heathrow are in the **Top 15**.

✘ The **Top 6** global airports are currently **all based in the US**.

✘ The **first Asian airport in 2022** is **New Delhi (13th)**.



Jet Fuel Price Europe



Source: IATA/Platts

- ✖ **Jet fuel prices** remain highly volatile and surged to 410 cts/gallon on 3 June.
- ✖ **Jet fuel prices** averaged 382 cts/gallon in May (+120% vs May 2021 and +87% vs. May 2019).

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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