

23 June 2022



EUROCONTROL

Comprehensive Assessment

EUROPEAN AVIATION



SUPPORTING EUROPEAN AVIATION



NETWORK
MANAGER



Headlines (Week of 16 – 22 June 2022)

- **30,138 daily flights** on average over past week (+1% vs previous week); 86% 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 3,009 flights per day on average (+15% vs 2019), followed by **easyJet** (1,563; -17% vs 2019), **Turkish** (1,464; -1% vs 2019), **Lufthansa** (1,238; -20% vs 2019), **Air France** (1,082; -19% vs 2019), **Wizz Air** (799; +21% vs 2019) and **KLM** (796; -16% vs 2019).
- Domestic traffic vs 2019: Europe (-10%), USA (-17%), **China (-35%** improving) and Middle-East (-4%).
- **Two** European airports (**Amsterdam** and **Paris CDG**) are in the Top10 Global airports.
- Increasing **pressure** on **European airports** which are dealing with staffing issues as passenger numbers increase, resulting in cancellations and delays.
- ATFM delays (airport and en-route) are increasing since April and are now close to 2019 levels.
- **Jet fuel prices increased** at **428 cts/gallon** on 17 June (+5% over two weeks, +84% since early January).



Traffic Situation

Average daily flights (including overflights)

On week 16 - 22 Jun 2022

86%

of equivalent week in 2019

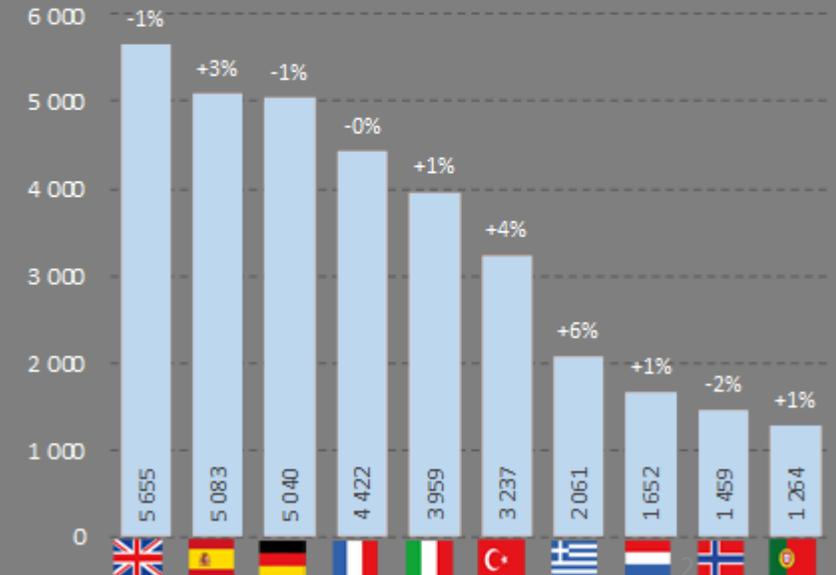
Top 10 Aircraft Operators

on Week 16 - 22 Jun 2022 (avg daily flights)

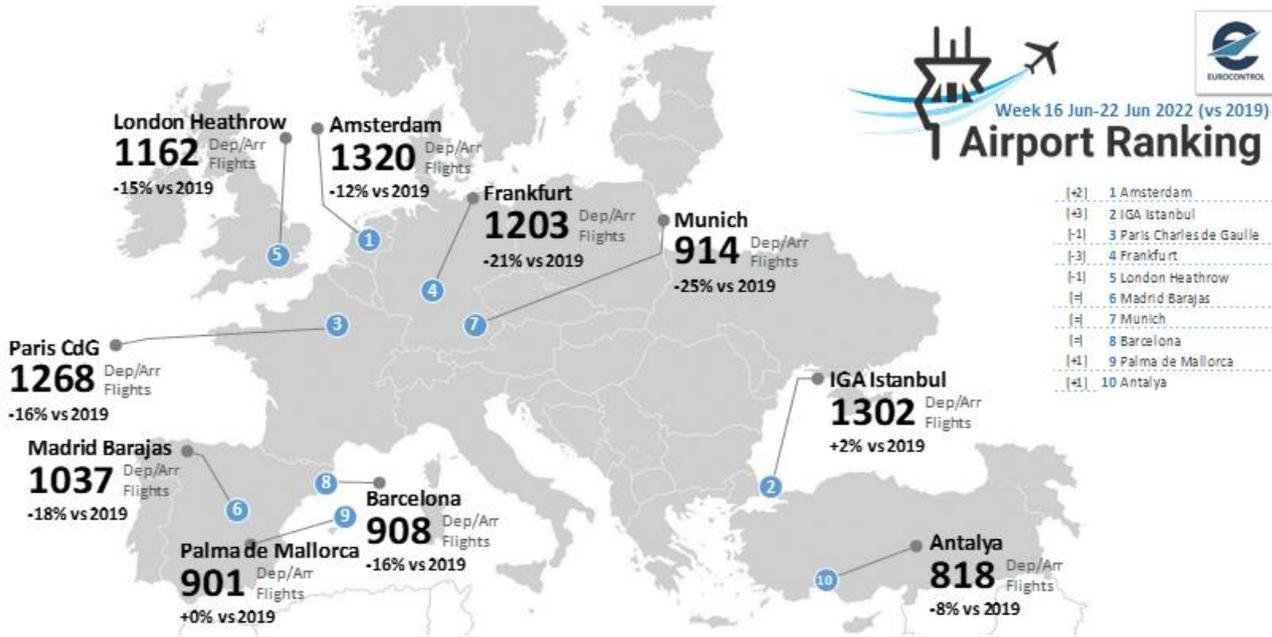
<p>1.</p> <p>easyJet Group</p>	<p>Operated 1 563 flights</p> <p>↓17%</p> <p>vs same week in 2019</p> <p>↑2% vs prev week</p>	<p>2.</p> <p>Turkish Airlines</p>	<p>Operated 1 464 flights</p> <p>↓1%</p> <p>vs same week in 2019</p> <p>↑5% vs prev week</p>	<p>3.</p> <p>Lufthansa Airlines</p>	<p>Operated 1 238 flights</p> <p>↓20%</p> <p>vs same week in 2019</p> <p>↑1% vs prev week</p>
<p>4.</p> <p>Air France Group</p>	<p>Operated 1 082 flights</p> <p>↓19%</p> <p>vs same week in 2019</p> <p>↑1% vs prev week</p>	<p>5.</p> <p>Wizz Air Group</p>	<p>Operated 799 flights</p> <p>↑21%</p> <p>vs same week in 2019</p> <p>↑2% vs prev week</p>	<p>6.</p> <p>KLM Group</p>	<p>Operated 796 flights</p> <p>↓16%</p> <p>vs same week in 2019</p> <p>↓0% vs prev week</p>
<p>7.</p> <p>British Airways Grp</p>	<p>Operated 734 flights</p> <p>↓25%</p> <p>vs same week in 2019</p> <p>↓1% vs prev week</p>	<p>8.</p> <p>Vueling</p>	<p>Operated 677 flights</p> <p>↓7%</p> <p>vs same week in 2019</p> <p>↑10% vs prev week</p>	<p>9.</p> <p>SAS Group</p>	<p>Operated 624 flights</p> <p>↓28%</p> <p>vs same week in 2019</p> <p>↓2% vs prev week</p>
<p>10.</p> <p>Ryanair Group</p>	<p>Operated 3 009 flights</p> <p>↑15%</p> <p>vs same week in 2019</p> <p>↑1% vs prev week</p>				

Top 10 Busiest States

on week 16 - 22 Jun 2022 (avg daily flights)
(Dep/Arr flights and comparison with previous week)

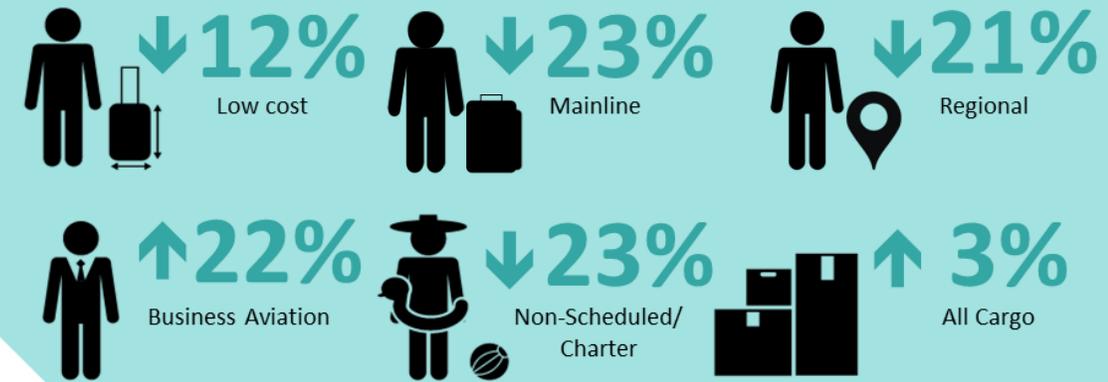


Top 10 Busiest Airports, Flows, Market segments & Fuel prices



Market Segments

on week 16 – 22 Jun 2022 (vs 2019)



Traffic Flow

Average daily flights on week of 16 - 22 Jun 2022

	Flights	vs previous week	vs 2019
Intra-European	24 430	+1%	-10%
Intercontinental	5 020	+3%	-28%

Economics

(17 June 2022)

Fuel price

↑ 428
cents/gallon
compared to

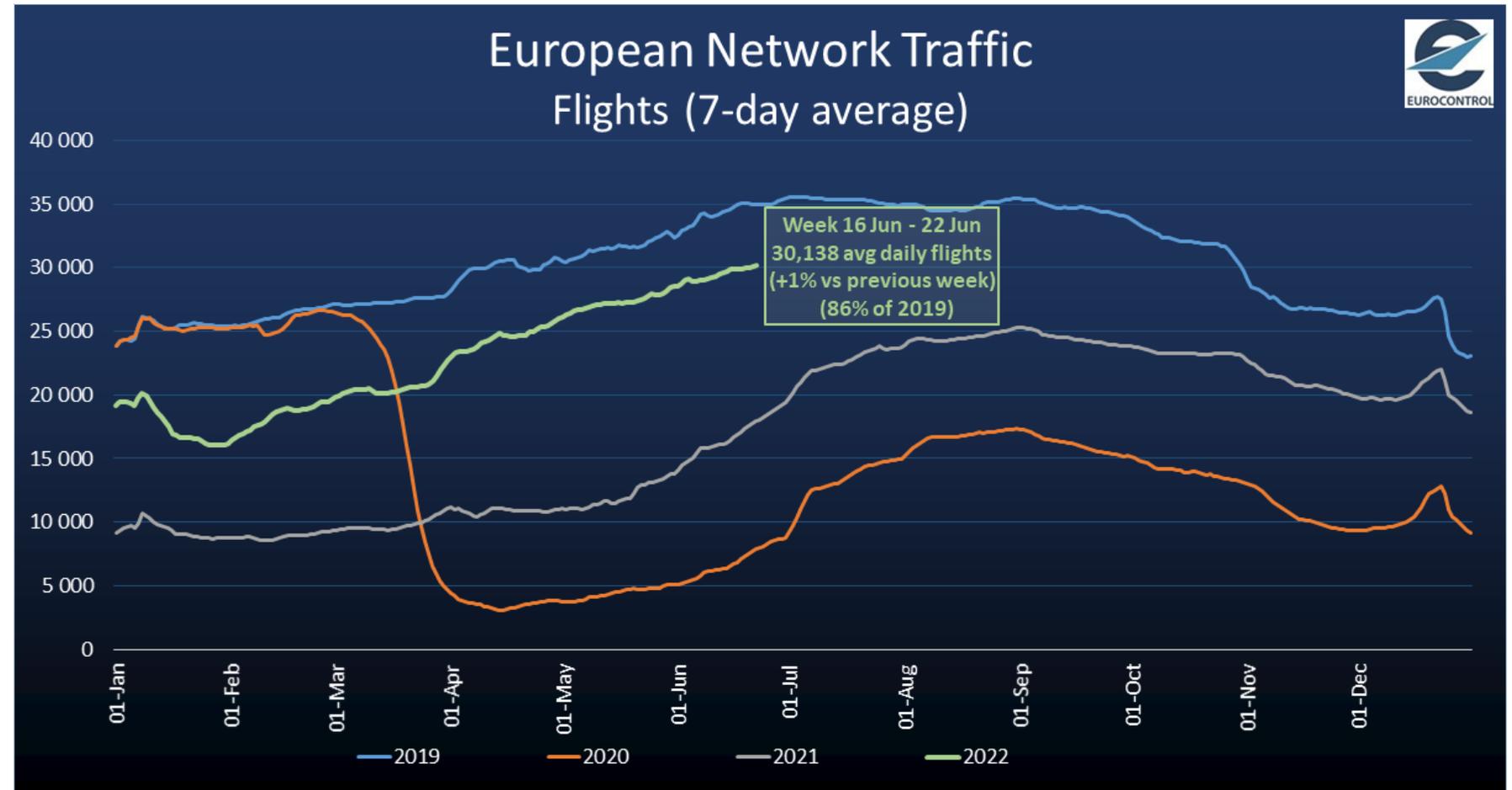
410 cents/gallon on 3 June 2022

Source: IATA/Platts

Overall traffic situation at network level

On week 16 – 22 June:

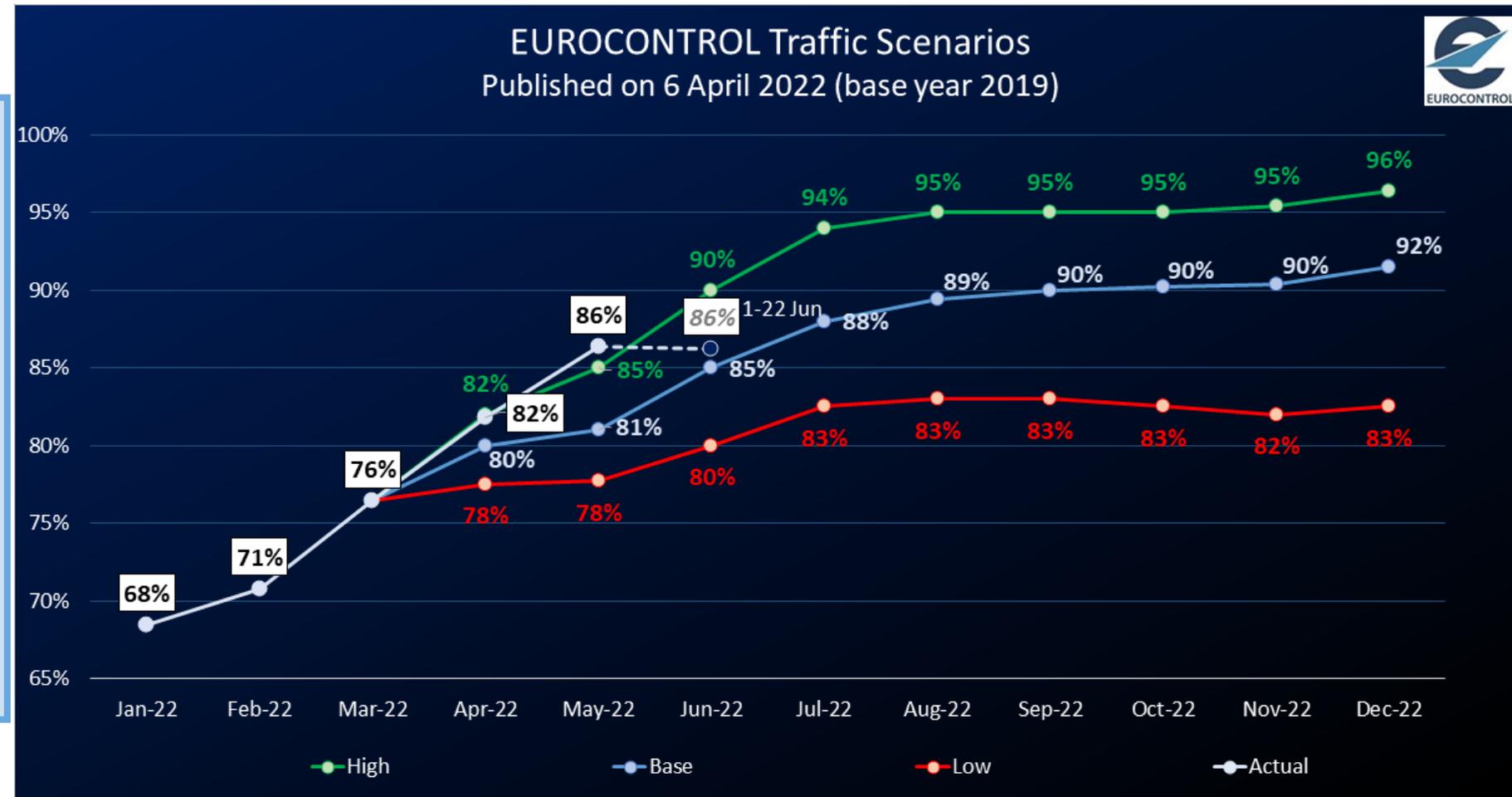
- ✘ **30,138** average daily flights.
- ✘ **+1%** on previous week.
- ✘ **86%** of 2019 traffic levels.
- ✘ Constant increase since mid April 2022.



Current situation compared to the latest EUROCONTROL traffic scenarios



- ✘ The last EUROCONTROL Traffic scenarios have been published on 6 April 2022.
- ✘ For the first 22 days of **June**, network traffic is at **86% of 2019** levels, in line with the base scenario.
- ✘ On a year to date basis, network traffic in 2022 stands at **79%** of 2019.





Market Segments

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



Up until the 22nd of June 2022, compared to 2019:

- ✘ Two segments are above or at 2019 levels: **All-cargo (+3%)** and **Business Aviation (+22%)**.
- ✘ **Low-Cost (-12%)** recorded a continuous increase since the beginning of 2022, but stagnates over the past 4 weeks.
- ✘ **Charter (-23%)** decreased mainly since the start of the Russian invasion of Ukraine but have now stabilized.
- ✘ **Mainline (-21%)** and **Regional (-21%)** continued to slowly catch up vs 2019 since the beginning of 2022.

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 (16 - 22 Jun 2022)		
	Average flights per day	% vs 2019	% over previous week
RYANAIR	3 009	+15%	+1%
easyJet	1 563	-17%	-2%
TURKISH AIRLINES	1 464	-1%	+5%
Lufthansa	1 238	-20%	-1%
AIRFRANCE	1 082	-19%	+1%
Wizz	799	+21%	+2%
KLM Royal Dutch Airlines	796	-16%	-0%
BRITISH AIRWAYS	734	-25%	-1%
vueling	677	-7%	+10%
SAS Scandinavian Airlines	624	-28%	-2%

✘ **Ryanair** is the busiest Aircraft Operator with 3,009 flights per day on average over last week, followed by **easyJet** (1,563), **Turkish Airlines** (1,464), **Lufthansa** (1,238), **Air France** (1,082), **Wizz Air** (799) and **KLM** (796).

✘ Wizz Air and Vueling increased their ranking compared with previous week while KLM and SAS decreased.

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

- ✘ **Turkish Airlines** (+65 flights; +5%) mainly due by far to Türkiye-Türkiye, followed by Germany-Türkiye and Saudi Arabia-Türkiye.
- ✘ **Vueling** (+61 flights; +10%) mainly due by far to Spain-Spain, followed by Italy-Spain, Greece-Italy and Greece-Spain.

Main decreases for:

- ✘ **easyJet** (-32 flights; -2%) mainly due to UK-UK, Spain-UK, France-Italy, France-Portugal, Switzerland-UK and France-UK.
- ✘ **Lufthansa** (-16 flights; -1%) mainly due by far to Germany-Germany, followed by Belgium-Germany, Germany-Italy and Germany-UK.

Aircraft operators (Average daily flights for the last week)

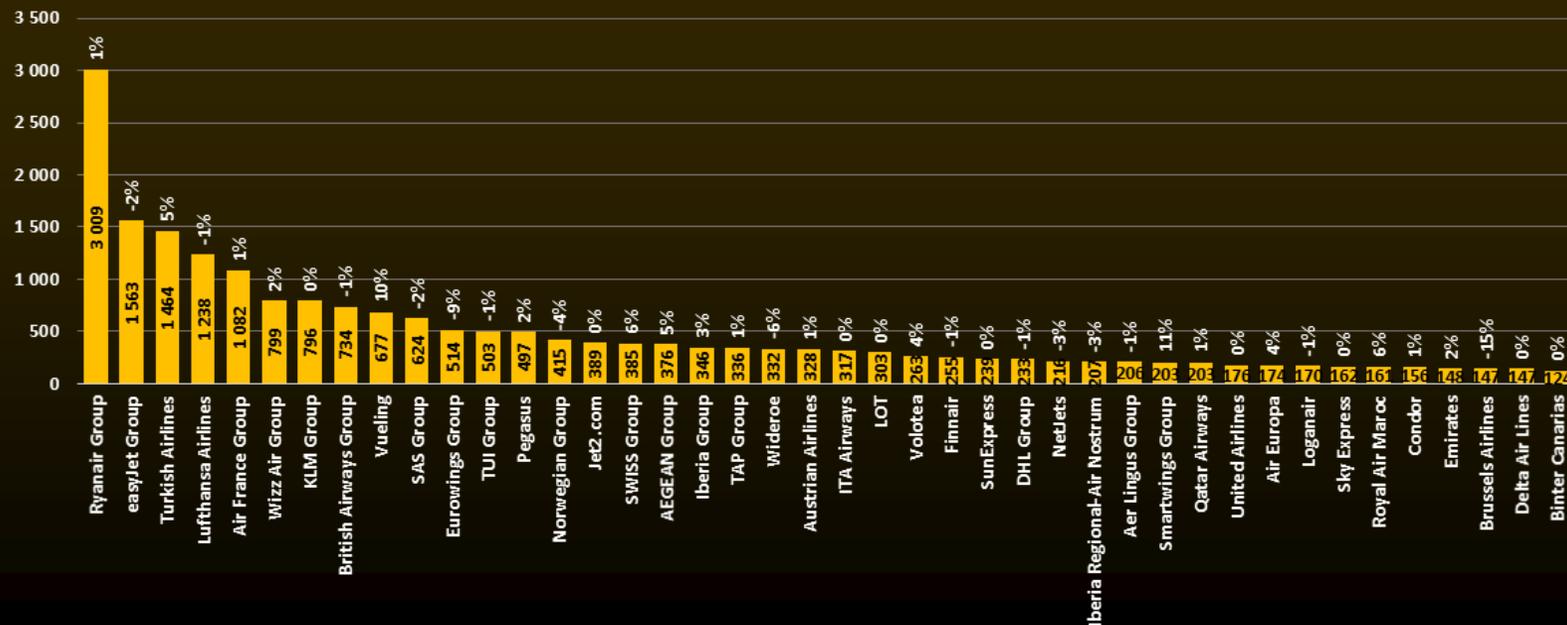


Top 40

Aircraft operators



Average daily flights for week 16 - 22 Jun 2022 and comparison with previous week

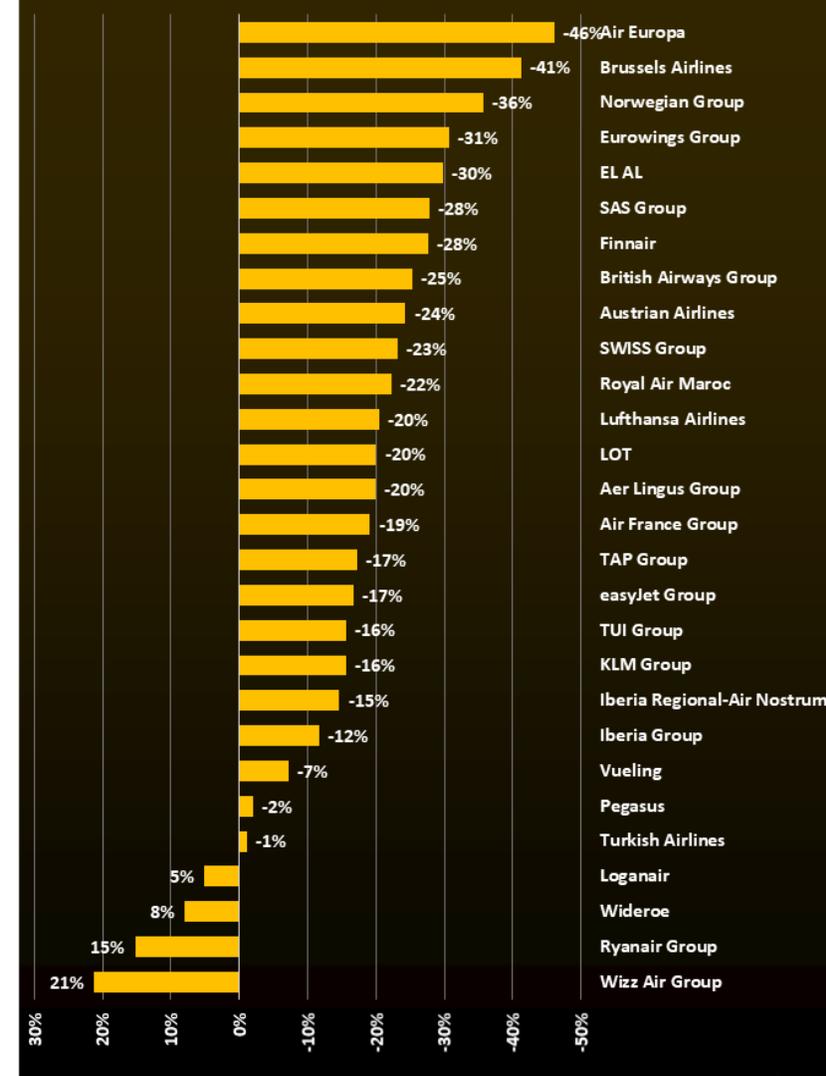


- ✘ Largest increases in flights vs previous week for **Turkish Airlines (+5%)**, **Vueling (+10%)**, **SWISS (+6%)**, **Smartwings (+11%)**, **Wizz Air (+2%)** and **AEGEAN (+5%)**.
- ✘ Highest decreases for **Eurowings (-9%)**, **easyJet (-2%)**, **Brussels Airlines (-15%)** and **Wideroe (-6%)**.
- ✘ Traffic levels ranging from **-46% (Air Europa)** to **+21% (Wizz Air)** vs 2019.

Aircraft Operators in EUROCONTROL Network (compared with equivalent week in 2019)



IFR Flights for Week 16 - 22 Jun 2022



Aircraft operators (Average daily flights for the last week)

Cargo, Legacy, Low Cost and Regional Carriers



PERFORMANCE OF MAJOR CARGO CARRIERS

for the week 16 - 22 June 2022



PERFORMANCE OF MAJOR LOW-COST CARRIERS

for the week 16 - 22 June 2022



PERFORMANCE OF MAJOR LONG-HAUL/LEGACY CARRIERS

for the week 16 - 22 June 2022



PERFORMANCE OF MAJOR REGIONAL CARRIERS*

for the week 16 - 22 June 2022



*REGIONAL AIRLINES USING SEPARATE IATA CODES

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



Top 10 States

on week 16 - 22 Jun 2022 (avg daily dep/arr)

1.  United Kingdom	5 655 flights ↓15% vs same week in 2019 ↓1% vs prev week
2.  Spain	5 083 flights ↓8% vs same week in 2019 ↑3% vs prev week
3.  Germany	5 040 flights ↓19% vs same week in 2019 ↓1% vs prev week
4.  France	4 422 flights ↓13% vs same week in 2019 ↓0% vs prev week
5.  Italy	3 959 flights ↓8% vs same week in 2019 ↑1% vs prev week
6.  Türkiye	3 237 flights ↓6% vs same week in 2019 ↑4% vs prev week
7.  Greece	2 061 flights ↑1% vs same week in 2019 ↑6% vs prev week
8.  Netherlands	1 652 flights ↓9% vs same week in 2019 ↑1% vs prev week
9.  Norway	1 459 flights ↓4% vs same week in 2019 ↓2% vs prev week
10.  Portugal	1 264 flights ↓2% vs same week in 2019 ↑1% vs prev week

✘ **UK** is the State with the highest number of dep/arr flights on average over last week (5,655) followed by **Spain** (5,083), **Germany** (5,040), **France** (4,422) and **Italy** (3,959).

✘ Spain increased its ranking compared with the previous week while Germany decreased.

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

✘ **Spain** (+126 flights; +3%): mainly Vueling and Domestic flows.

✘ **Türkiye** (+123 flights; +4%): Mainly Turkish Airlines and Domestic flows as well as flows with Russia.

✘ **Greece** (+118 flights; +6%): Mainly light AOs, Wizz Air, Olympic and Aegean. Mainly Domestic flows followed by flows with Italy, Norway, Spain, UK and Hungary.

Main decreases:

✘ **Germany** (-66 flights; -1%): Mainly light AOs, followed by Eurowings, German Wings and Lufthansa. Domestic flows.

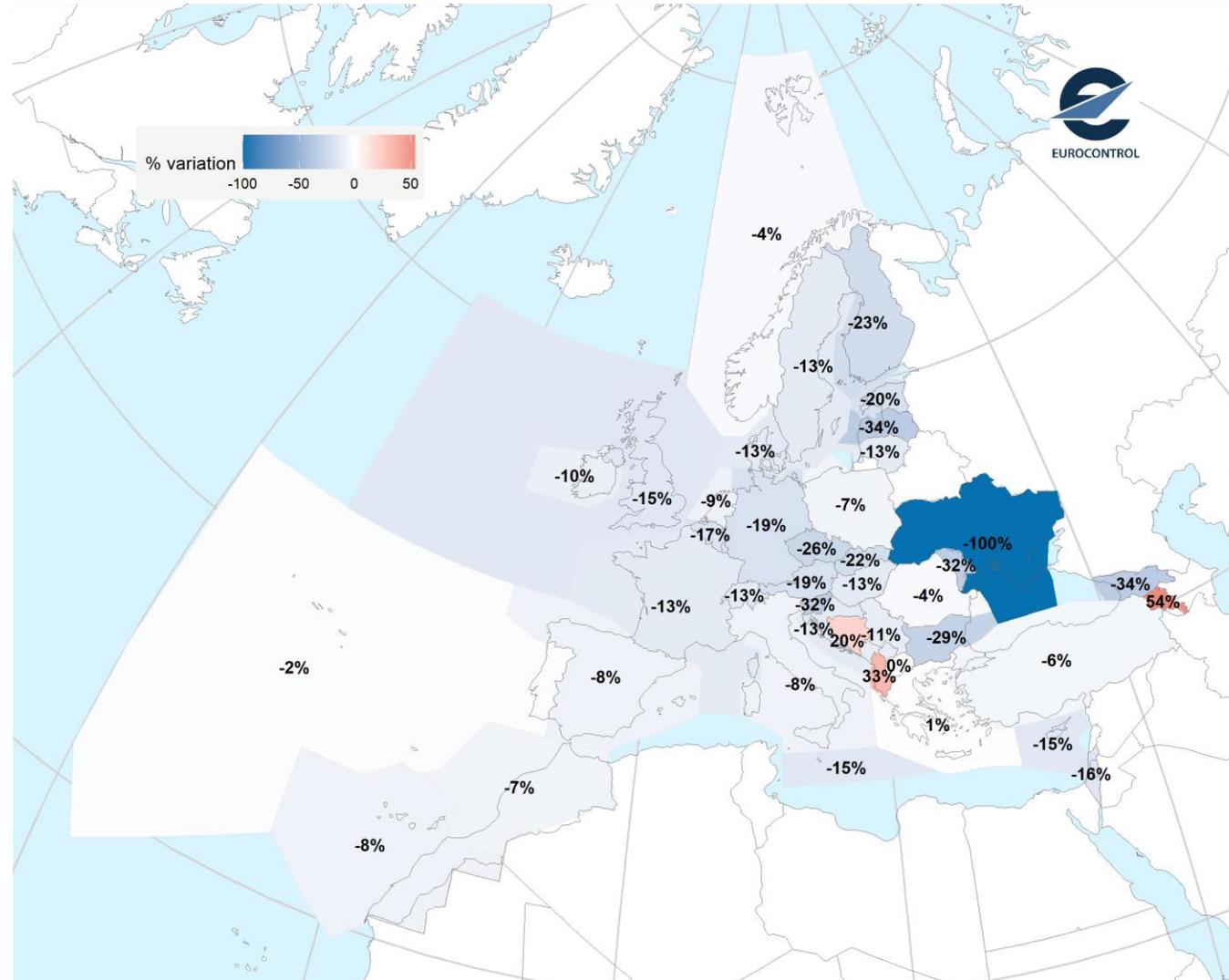
✘ **UK** (-63 flights; -1%): Mainly easyJet, BA Shuttle, Eurowings and TUI. Flows with Germany, Domestic, Ireland and Belgium.

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



State FIR daily % arrivals/departures variation vs 2019 on 2022-06-22

7-day average - FIRs at altitude FL200



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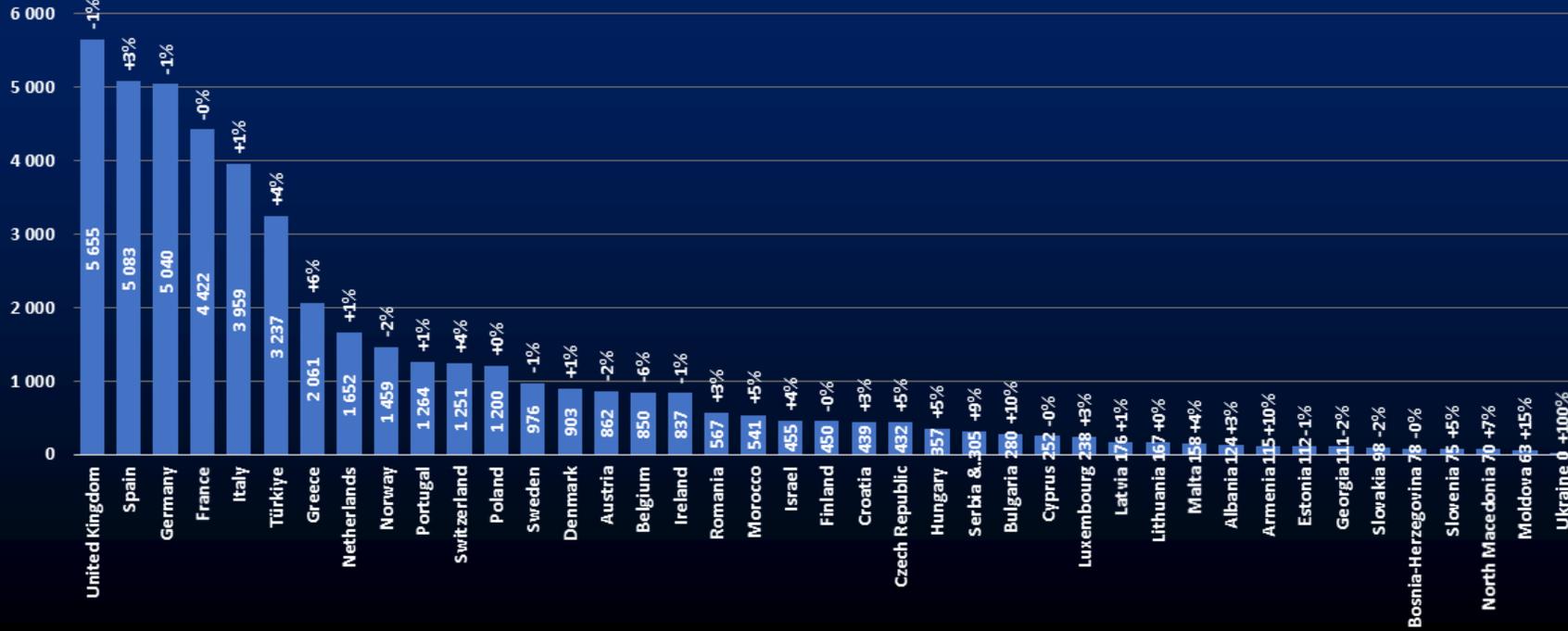
States (Average Daily Departure/Arrival flights for the last week)

Top 40



States (Dep/Arr flights)

Average daily flights for week 16 - 22 Jun 2022 and comparison with previous week



✘ Highest increases in flights vs previous week for **Spain (+3%)**, **Türkiye (+4%)** and **Greece (+6%)**.

✘ Highest decreases for **Germany (-1%)**, **UK (-1%)** and **Belgium (-6%)**.

✘ Traffic levels ranging from -100% (**Ukraine**) to +54% (**Armenia**), compared to 2019.

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

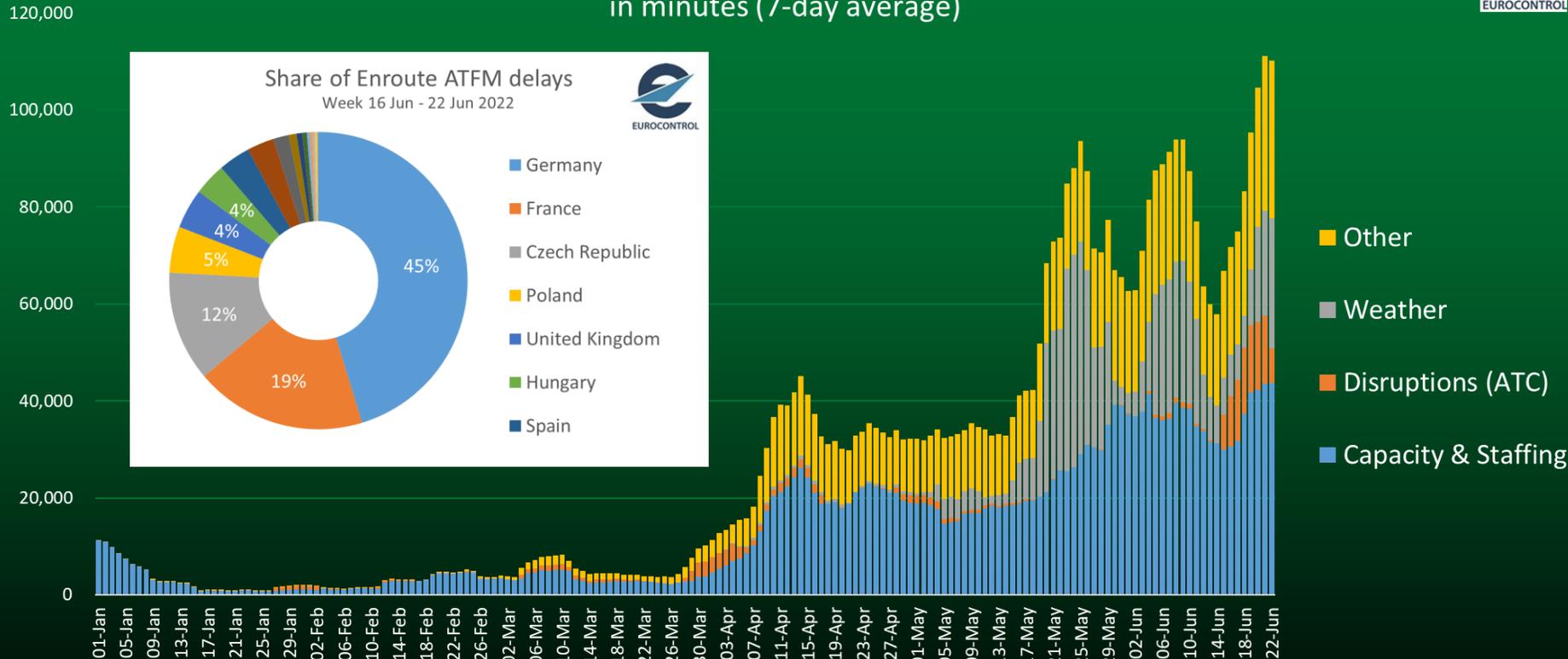
IFR Dep/Arr Flights for Week 16 - 22 Jun 2022



En-route ATFM delays



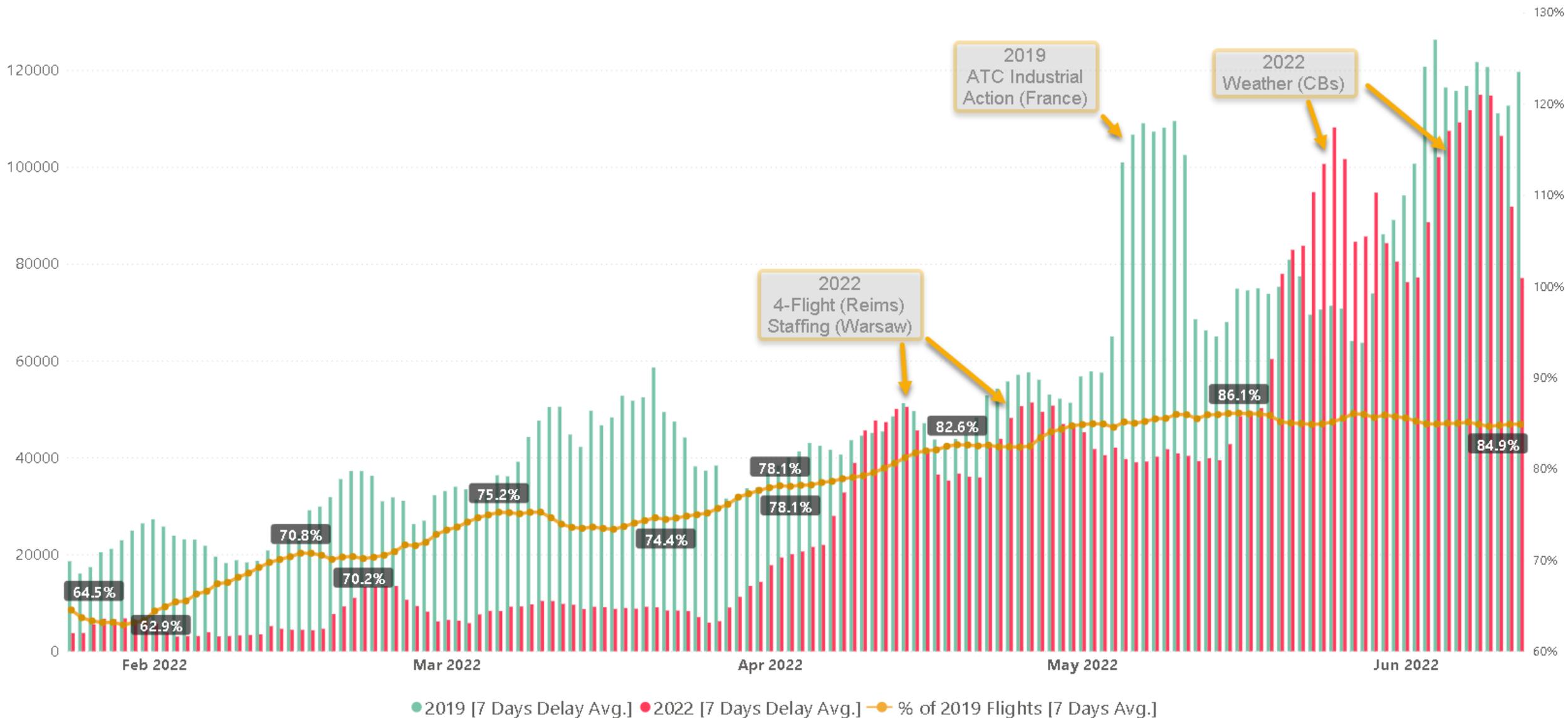
Enroute ATFM Delays (EUROCONTROL Area)
in minutes (7-day average)



✘ En-route ATFM delays have started to rise since end May 2022, reaching 2019 levels.

✘ Major contributors over the last 7 days: **Germany** (45% of all en-route ATFM delays), **France** (19%), **Czech Republic** (12%), **Poland** (5%), **UK** (4%) and **Hungary** (4%).

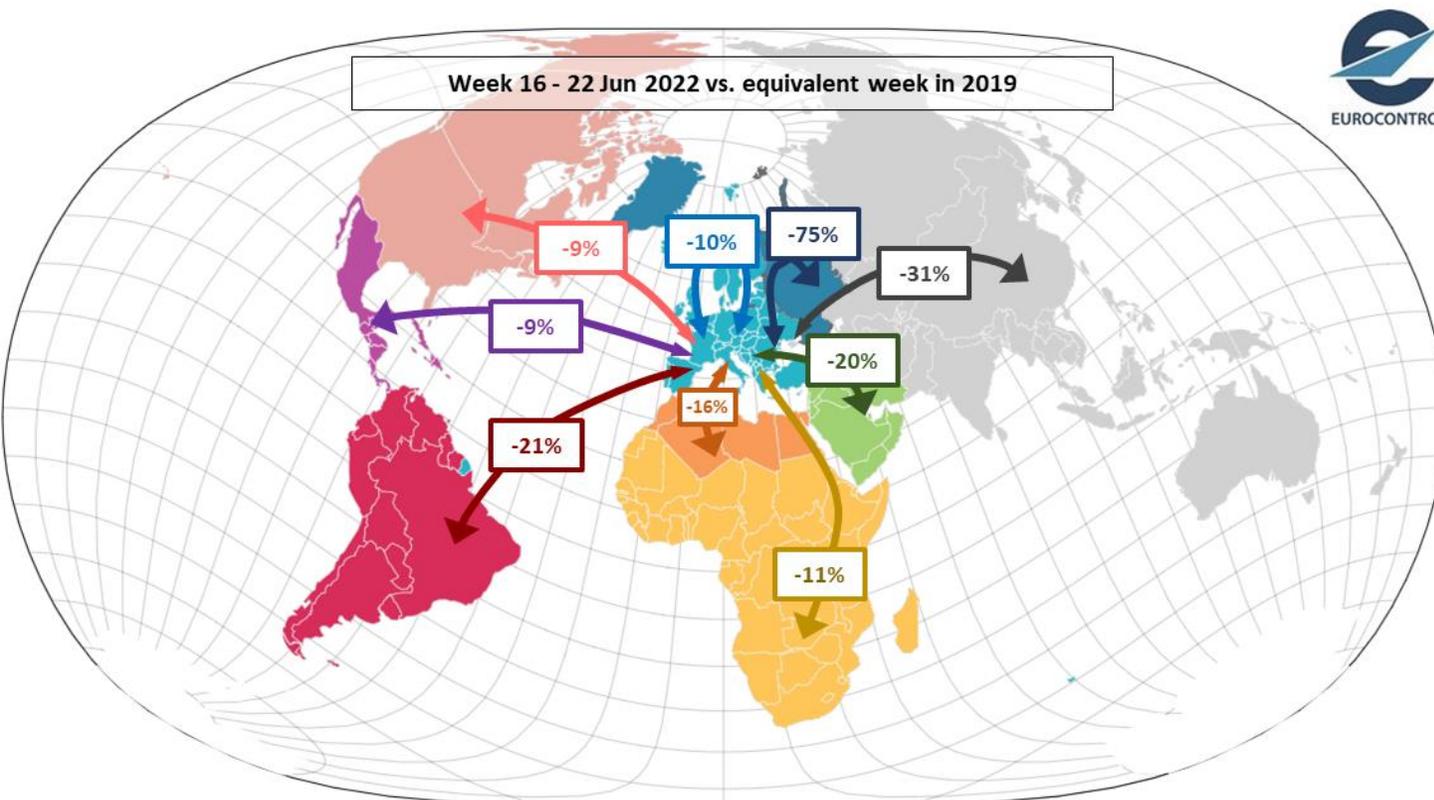
Total ATFM delays (All causes, airports and en-route) 2019 and 2022 (7-day average)



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

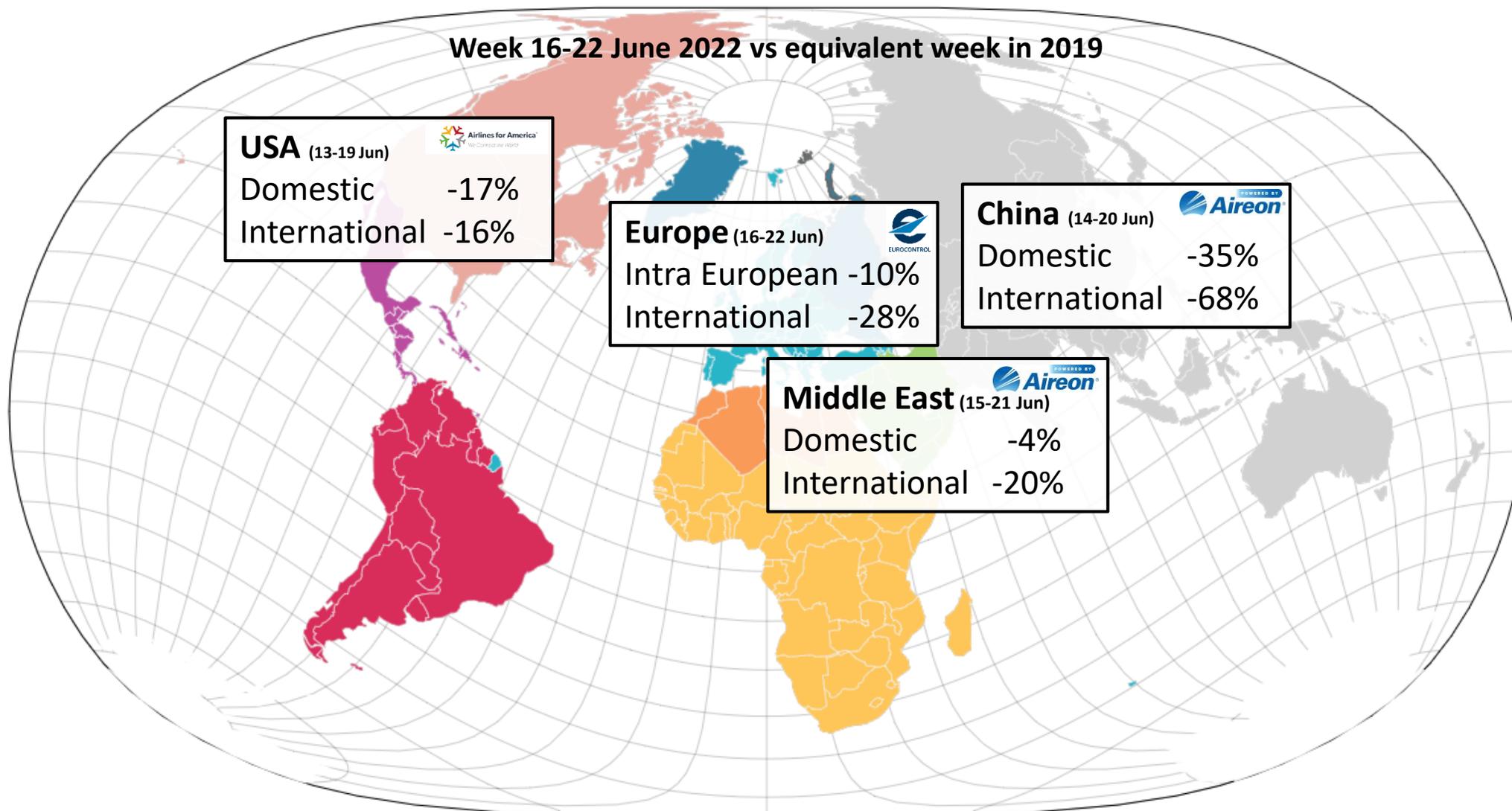


- ✘ The main traffic flow is the intra-Europe flow with 24,430 flights on average the most recent week, increasing by 1% over the previous week.
- ✘ Flows between Europe and Other Europe (incl. Russia) are at -75% compared to 2019.
- ✘ Important lockdown in China, owing to a surge in COVID-19 cases is affecting Chinese domestic flows (next slide).
- ✘ Intra-Europe flights are at -10% compared to 2019 while intercontinental flows are at -28%.



REGION (Average daily flights)	Week 09/06/2022 - 15/06/2022	Week 16/06/2022 - 22/06/2022	%	vs. 2019
Intra-Europe	24 306	24 430	+1%	-10%
Europe<->Asia/Pacific	569	569	-0%	-31%
Europe<->Mid-Atlantic	147	151	+3%	-9%
Europe<->Middle-East	1 202	1 257	+5%	-20%
Europe<->North Atlantic	1 338	1 347	+1%	-9%
Europe<->North-Africa	909	945	+4%	-16%
Europe<->Other Europe	306	330	+8%	-75%
Europe<->South-Atlantic	150	152	+1%	-21%
Europe<->Southern Africa	267	269	+1%	-11%
Non Intra-Europe	4 889	5 020	+3%	-28%

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 16 - 22 Jun 2022				
	Airport-Pair	Avg daily flights	Δ vs prev. week	% vs prev. week	% vs 2019
→	London/Heathrow <-> New York JFK	35	→ -0	-1%	↓ -11%
→	London/Heathrow <-> Newark	19	→ +0	+1%	↑ +23%
→	London/Heathrow <-> Los Angeles	18	→ -0	-2%	→ +1%
↑	London/Heathrow <-> Chicago O Hare Intl	17	→ +0	+3%	↑ +2%
↓	Paris/Charles-De-Gaulle <-> New York JFK	17	→ -1	-3%	↑ +11%
→	London/Heathrow <-> Dubai	14	→ +0	+0%	↓ -18%
→	London/Heathrow <-> Boston	14	→ +0	+1%	↓ -1%
↑	Paris/Charles-De-Gaulle <-> Montreal/Dorval	14	↑ +3	+30%	→ +0%
↓	London/Heathrow <-> San Francisco	14	→ +0	+2%	↑ +16%
↓	Frankfurt <-> Seoul/Inchon INTL	13	→ +0	+3%	↑ +52%
↑	London/Heathrow <-> Hamad INTL	12	↑ +2	+16%	↓ -9%
↓	Madrid/Barajas <-> Bogota Intl/Eldorado	12	→ -0	-2%	↑ +20%
↓	London/Heathrow <-> Delhi	11	→ +0	+0%	↑ +10%
↓	Frankfurt <-> New York JFK	11	→ -0	-3%	↑ +18%
↑	London/Heathrow <-> Singapore/Changi	11	→ +1	+7%	↓ -23%
→	London/Heathrow <-> Washington	11	→ +0	+3%	↓ -12%
↓	Milan/Malpensa <-> New York JFK	10	→ -0	-3%	↑ +1%
→	Rome/Fiumicino <-> New York JFK	10	→ +0	+3%	↑ +3%
↑	Amsterdam <-> New York JFK	10	→ +1	+6%	↓ -16%
→	Madrid/Barajas <-> Mexico City	10	→ -0	-1%	↓ -12%

Within the top 20, most long-haul airport pairs remained stable on previous week, except Paris/CDG – Montreal and London/Heathrow – Hamad.

Slight changes over the last week with:

Increases for:

- ✘ Paris/CDG – Montreal (+3 flights)
- ✘ London Heathrow – Hamad (+2 flights)
- ✘ London Heathrow – Singapore (+1 flight)
- ✘ Amsterdam – New-York JFK (+1 flight)

Decreases for:

- ✘ Paris/CDG – 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 16 - 22 Jun 2022				
	Country-Pair	Avg daily flights	Δ vs prev. week	% vs prev. week	% vs 2019
→	Spain <-> Spain	1 283	↗ +46	+4%	↘ -3%
→	France <-> France	1 097	↘ -17	-2%	↘ -15%
→	Italy <-> Italy	985	↗ +13	+1%	↗ +1%
→	Spain <-> United Kingdom	907	→ +1	+0%	↘ -10%
↗	Türkiye <-> Türkiye	884	↗ +24	+3%	↘ -14%
↘	United Kingdom <-> United Kingdom	863	↘ -7	-1%	↘ -20%
→	Norway <-> Norway	791	↘ -66	-8%	↗ +4%
→	Germany <-> Germany	642	↘ -48	-7%	↘ -30%
→	Germany <-> Spain	591	↗ +7	+1%	↘ -9%
→	Greece <-> Greece	438	↗ +20	+5%	↘ -2%

Eight of the **top 10** flows are domestic.

✘ **Spain-Spain** is the country-pair with the highest number of dep/arr flights (1,283) followed by **France-France** (1,097), **Italy-Italy** (985), **Spain-UK** (907), **Türkiye-Türkiye** (884), **UK-UK** (863), **Norway-Norway** (791) and **Germany-Germany** (642).

✘ The flow **Türkiye-Türkiye** increased its ranking compared with the previous week while **UK-UK** decreased.

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

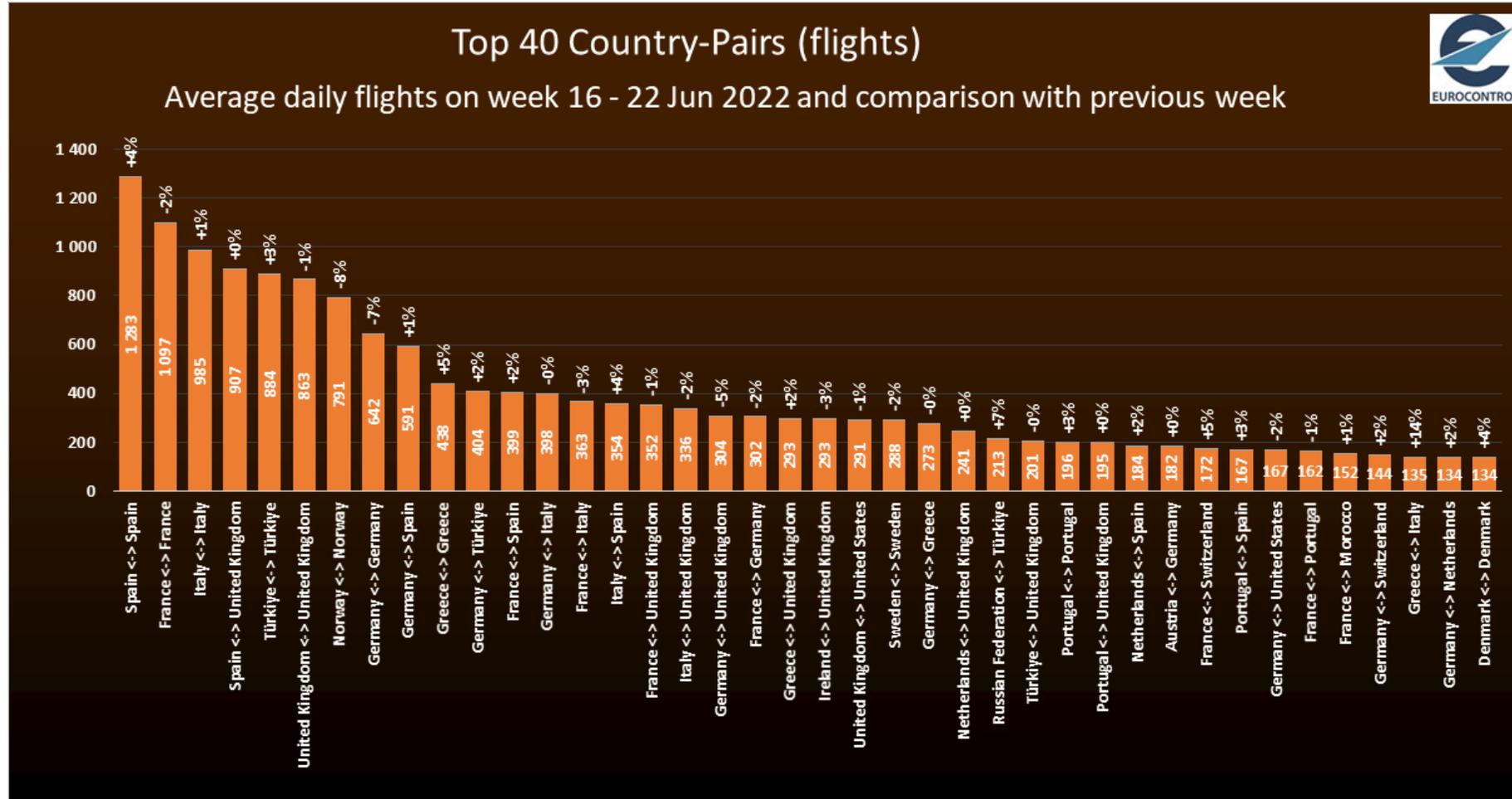
- ✘ **Spain-Spain** (+46 flights; +4%) mainly due to Vueling.
- ✘ **Türkiye-Türkiye** (+24 flights; +3%): mainly due to Turkish airlines.
- ✘ **Greece-Greece** (+20 flights; +5%): mainly due to Light AOs and Olympic.

Decreases for:

- ✘ **Norway-Norway** (-66 flights; -8%): mainly due to Norwegian Air Shuttle and Wideroe.
- ✘ **Germany-Germany** (-48 flights; -7%): mainly due to light AOs, German Wings and Lufthansa.

Country pairs (Average Daily flights for the last week)

Top 40



- ✘ Highest increase in flights vs previous week for **Spain-Spain (+4%)**, **Türkiye-Türkiye (+3%)**, **Greece-Greece (+5%)**, **Greece-Italy (+14%)**, **Russia-Türkiye (+7%)**, **Italy-Italy (+1%)** and **Italy-Spain (+1%)**.
- ✘ Highest decrease in flights vs previous week for **Norway-Norway (-8%)**, **Germany-Germany (-7%)**, **France-France (-2%)** and **Germany-UK (-5%)**.

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



Top 10

Rank evolution over prev. Week	Top 10 Airports on week 16 Jun - 22 Jun 2022				
	Airport	Average Daily Dep/Arr Flights	Δ over prev. week	% over prev. week	% vs 2019
→	Amsterdam	1 320	↗ +6	+0%	↘ -12%
→	IGA Istanbul Airport	1 302	↗ +38	+3%	↗ +2%
→	Paris/Charles-De-Gaulle	1 268	↗ +41	+3%	↘ -16%
→	Frankfurt	1 203	→ -1	-0%	↘ -21%
→	London/Heathrow	1 162	↘ -19	-2%	↘ -15%
→	Madrid/Barajas	1 037	↗ +21	+2%	↘ -18%
→	Munich	914	↘ -7	-1%	↘ -25%
→	Barcelona	908	↗ +27	+3%	↘ -16%
→	Palma De Mallorca	901	↗ +34	+4%	→ +0%
→	Antalya	818	↗ +56	+7%	↘ -8%

✘ **Amsterdam** is the airport with the highest number of dep/arr flights (1,320) followed by **IGA Istanbul** (1,302), **Paris CDG** (1,268), **Frankfurt** (1,203) and **London Heathrow** (1,162).

✘ The rankings remained unchanged compared with the previous week.

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

- ✘ **Antalya** (+56 flights; +7%): mainly due to Turkish Airlines, Azur Air, Light AOs, Air Serbia and Pegasus. Flows with Russia, Serbia and Türkiye.
- ✘ **Paris/CDG** (+41 flights; +3%): mainly due to Air France, Air Algerie and Vueling. Flows with Algeria, Germany and France.
- ✘ **Istanbul IGA** (+38 flights; +3%): mainly due Turkish Airlines and light AOs. Domestic flows and flows with Italy, Irak, Germany and Russia.
- ✘ **Palma de Mallorca** (+34 flights; +4%): mainly due to light AOs. Domestic flows and flows with Germany
- ✘ **Barcelona** (+27 flights; +3%): mainly due to Vueling and Domestic flows.

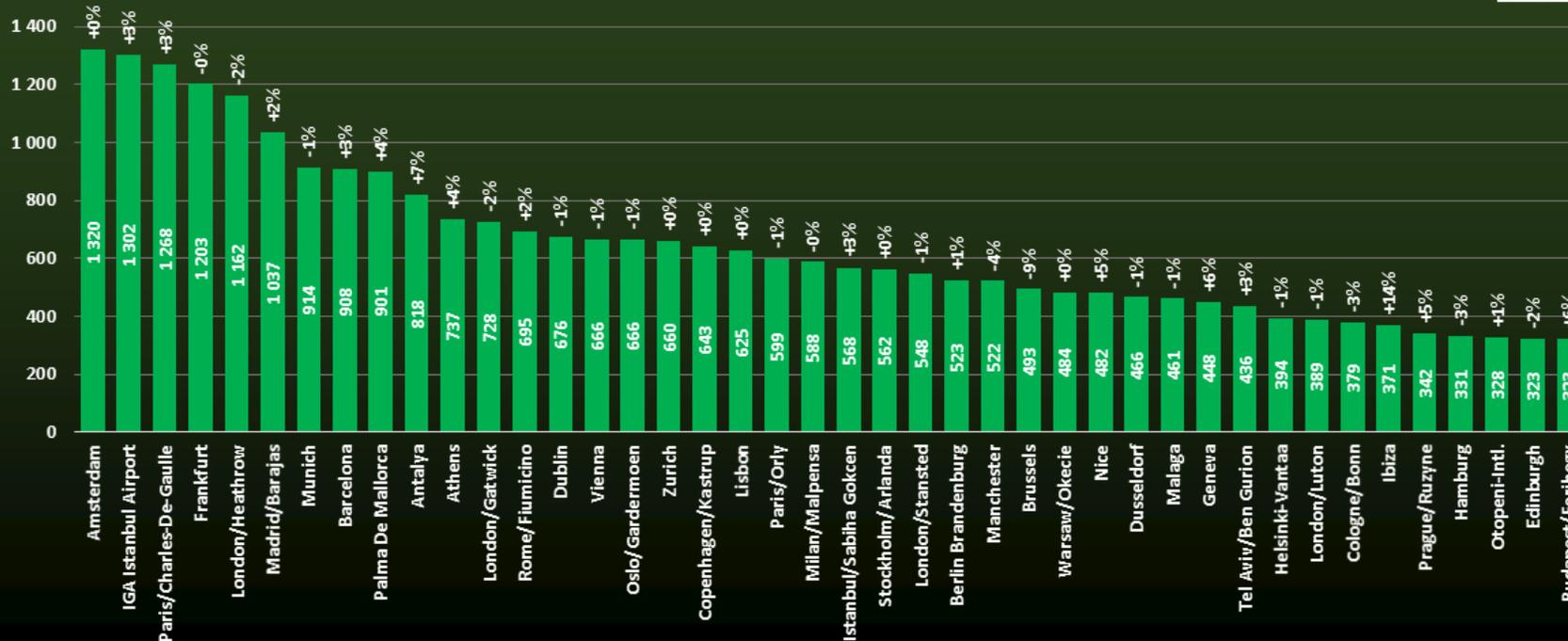
Airports (Average Daily Departure/Arrival flights for the last week)

Top 40



Top 40 Airports (Dep/Arr flights)

Average daily flights for week 16 - 22 Jun 2022 and comparison with previous week

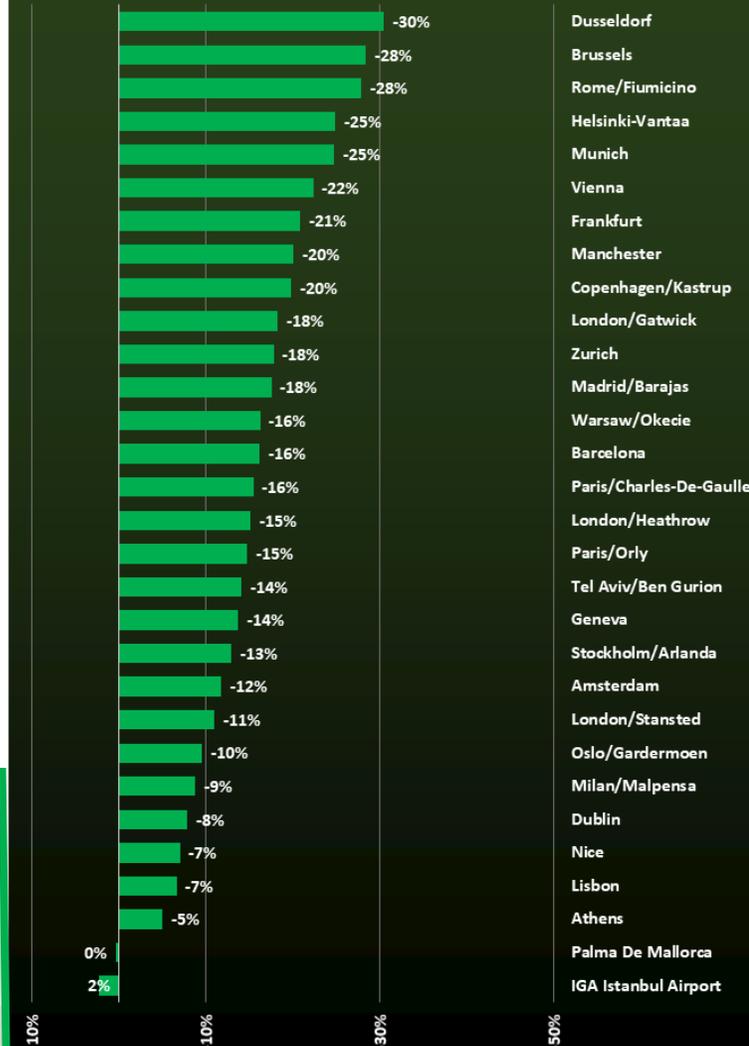


- ✦ Highest increases in flights vs the previous week for **Antalya (+7%)**, **Ibiza (+14%)**, **Paris/CDG (+3%)**, **IGA Istanbul (+3%)**, **Palma (+4%)**, **Athens (+4%)** and **Barcelona (+3%)**.
- ✦ Highest decreases for **Brussels (-9%)** and **Manchester (-4%)**.
- ✦ Traffic levels ranging from -30% (Dusseldorf) to +2% (IGA Istanbul) compared to 2019.

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



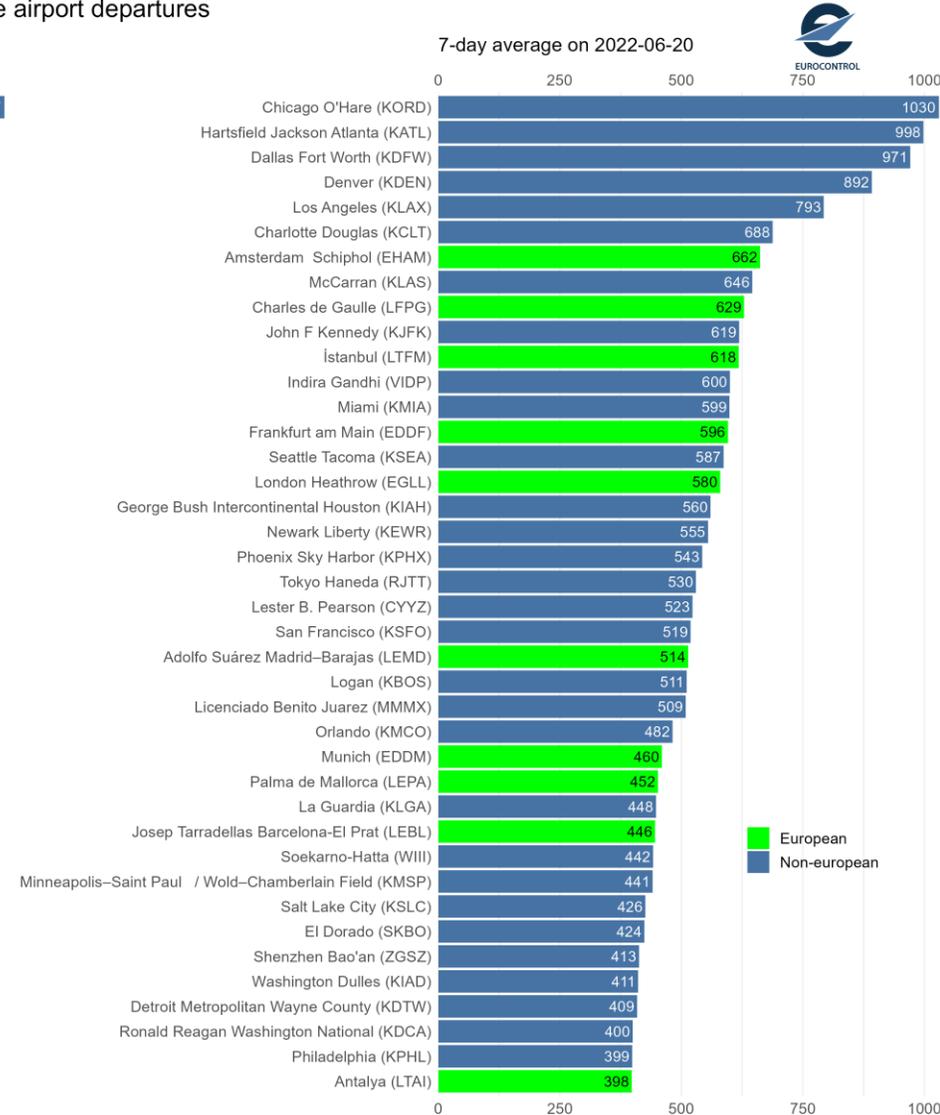
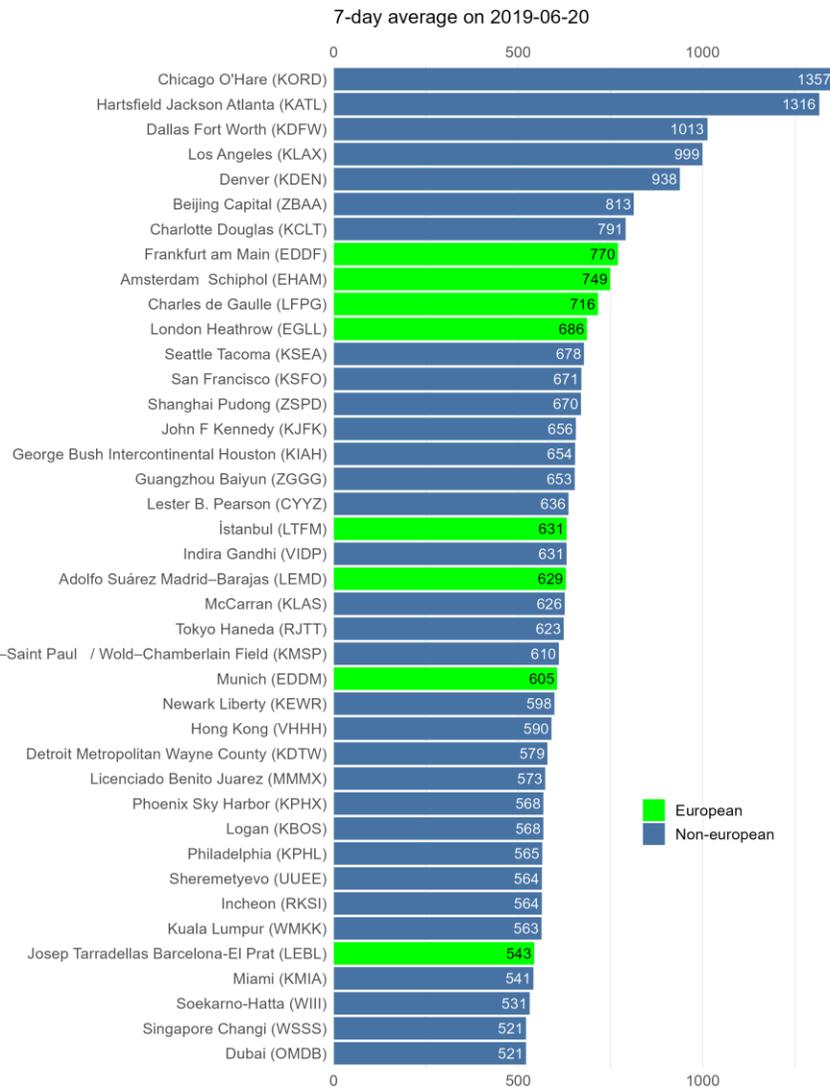
IFR Dep/Arr Flights for Week 16 - 22 Jun 2022



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):

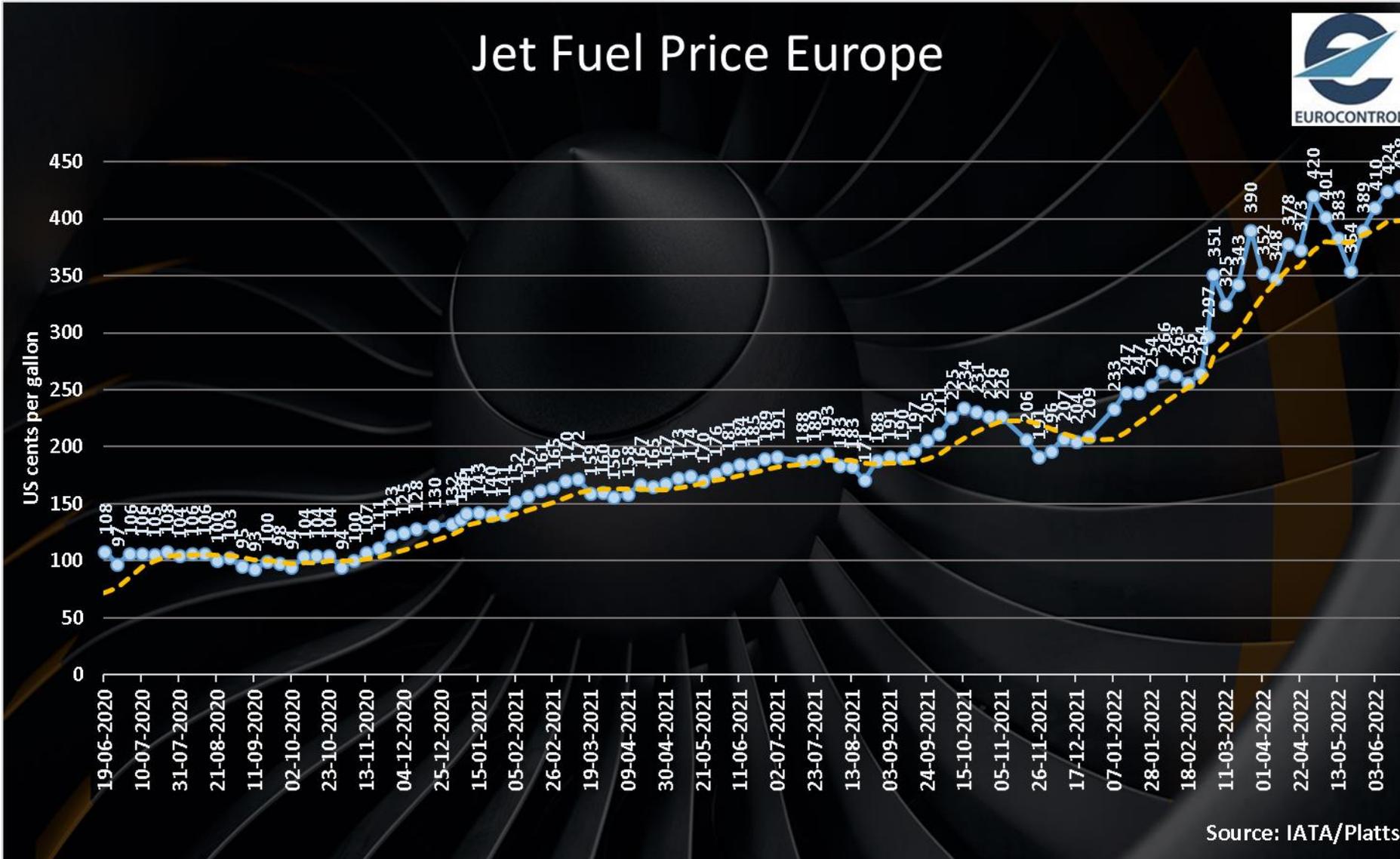
✘ **10 European airports** are ranked in the **Top 40** global airports (vs 8 in 2019)

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

✘ IGA Istanbul, Frankfurt and London Heathrow are in the **Top 16**.

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

✘ The **first Asian airport in 2022** is **New Delhi (12th)**.



- ✘ **Jet fuel prices** remain highly volatile and surged to 428 cts/gallon on 17 June.
- ✘ **Jet fuel prices** averaged 420 cts/gallon in June (+128% vs June 2021 and +122% vs June 2019).

To further assist you in your analysis, EUROCONTROL provides the following additional information on a daily basis (daily updates at 7:30 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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