

7 July 2022



EUROCONTROL

Comprehensive Assessment

EUROPEAN AVIATION



SUPPORTING EUROPEAN AVIATION



NETWORK
MANAGER



Headlines (Week of 30 June – 06 July 2022)

- **30,770 daily flights** on average over past week (+2% vs previous week); 87% of 2019 levels.
- **Traffic slightly below** the **base EUROCONTROL Traffic Scenarios** (6 Apr 22): 86% for July vs 2019 so far.
- **Ryanair** was the busiest aircraft operator last week with 2,996 flights per day on average (+14% vs 2019), followed by **easyJet** (1,602; -15% vs 2019), **Turkish** (1,519; +4% vs 2019), **Lufthansa** (1,164; -27% vs 2019), **Air France** (1,084; -19% vs 2019), **Wizz Air** (778; +17% vs 2019) and **KLM** (760; -19% vs 2019).
- Domestic traffic vs 2019: Europe (-10%), USA (-7%), **China (-25% improving)** and Middle-East (+9%).
- **Two** European airports (**IGA Istanbul** and **Amsterdam**) are in the Top 10 Global airports.
- With (school) holiday period starting, Mediterranean States are recording high flight growth rates (Spain, Italy, Greece) **putting increasing pressure** on **both operators** and **airports**.
- ATFM delays (airport and en-route) are increasing since April and are above 2019 levels.
- **Jet fuel prices decreased to 388 cts/gallon** on 1 July (-9% over two weeks, +66% since early January).



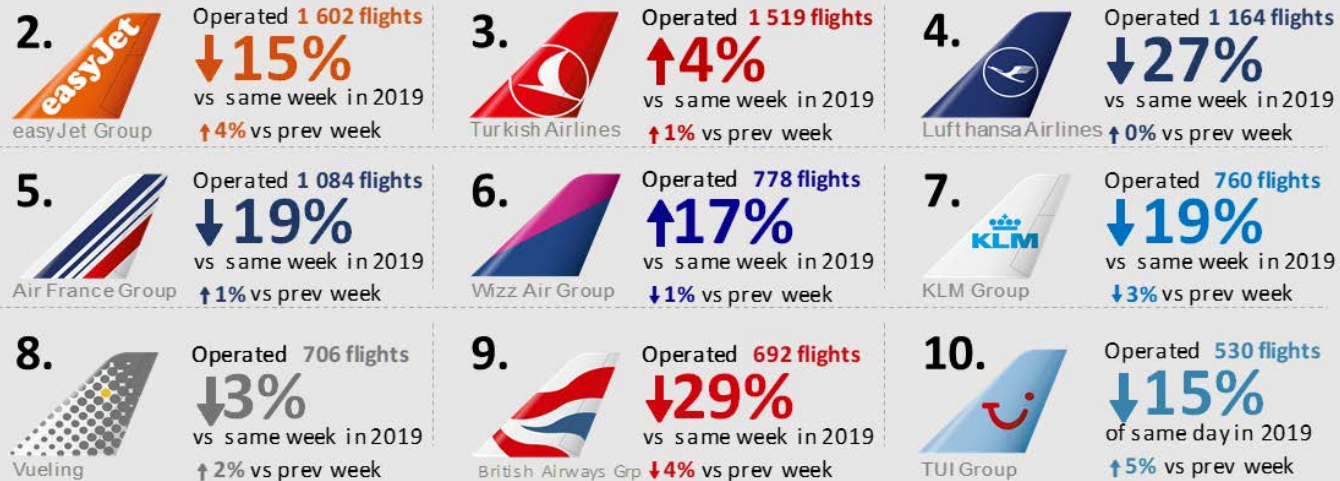
Traffic Situation

Average daily flights (including overflights)

On week 30 Jun - 06 Jul 2022

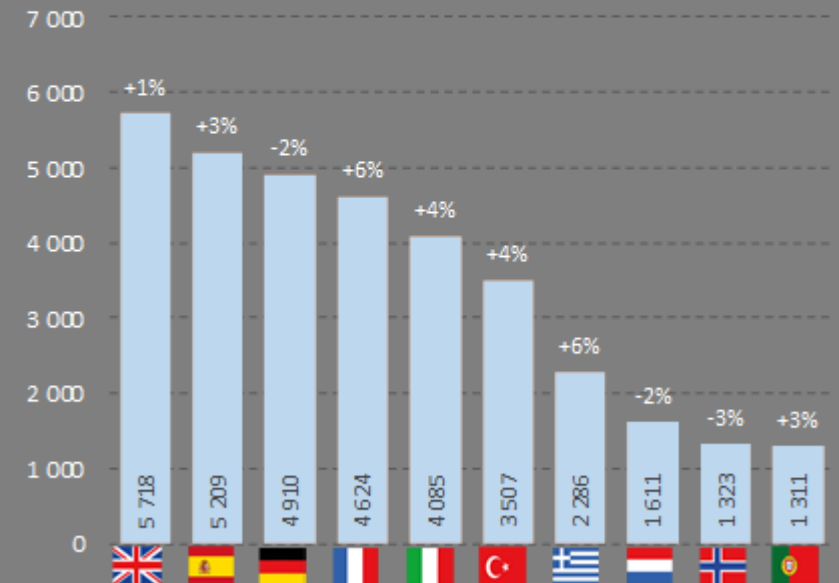
87% of equivalent week in 2019

Top 10 Aircraft Operators on Week 30 Jun - 06 Jul 2022 (avg daily flights)

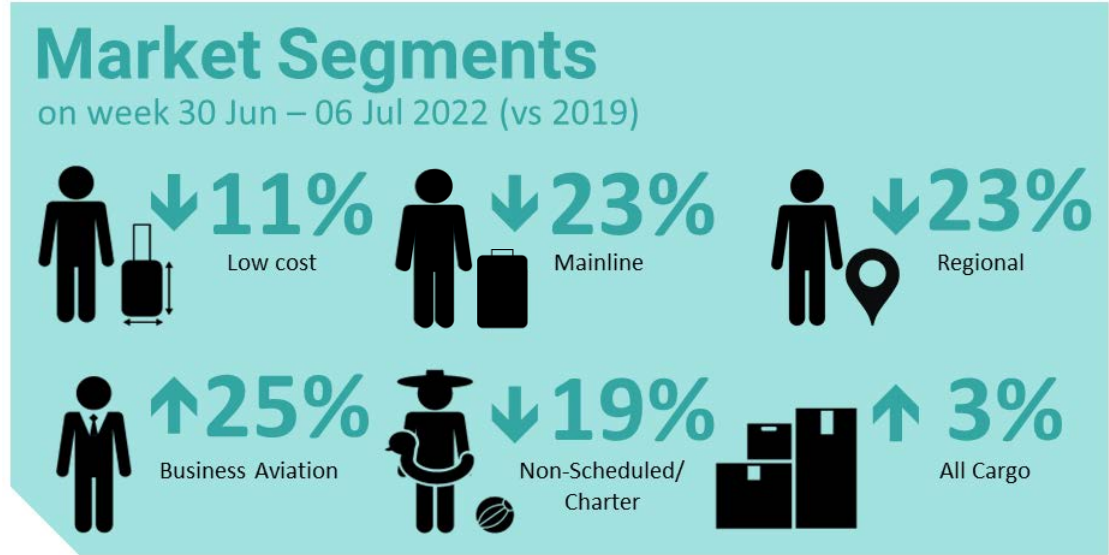
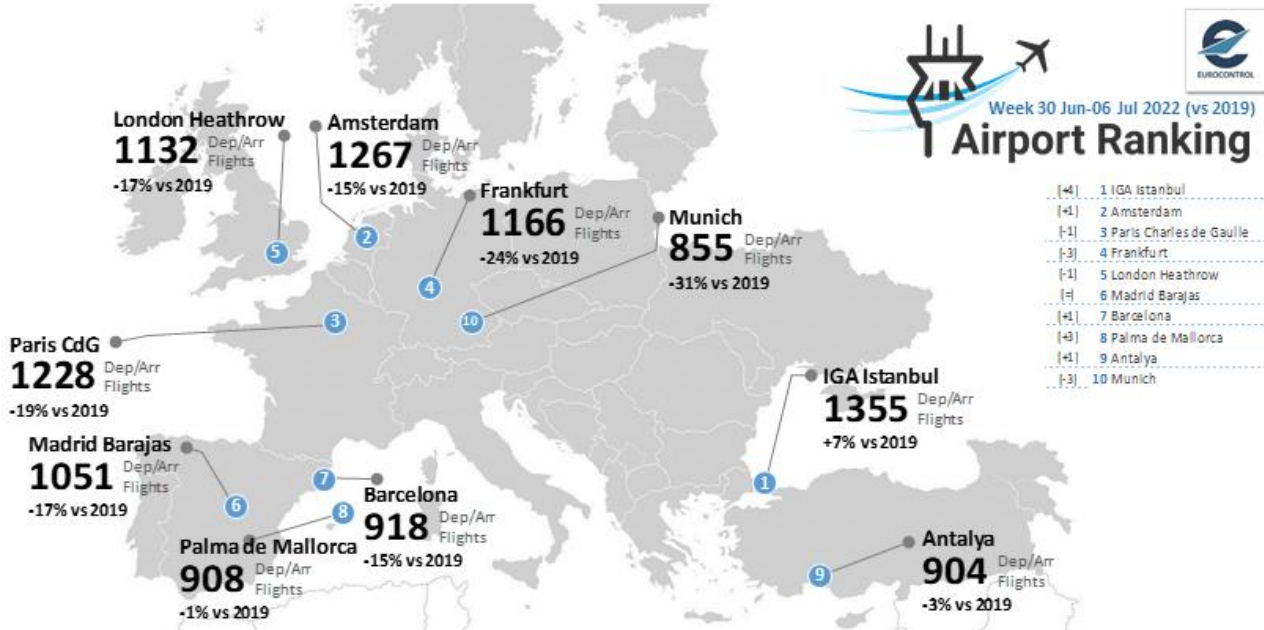


Top 10 Busiest States

on week 30 Jun - 06-Jul 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 30 Jun - 06 Jul 2022

	Flights	vs previous week	vs 2019
Intra-European	24 612	+2%	-10%
Intercontinental	5 423	+5%	-24%

Economics

(1 July 2022)
Fuel price

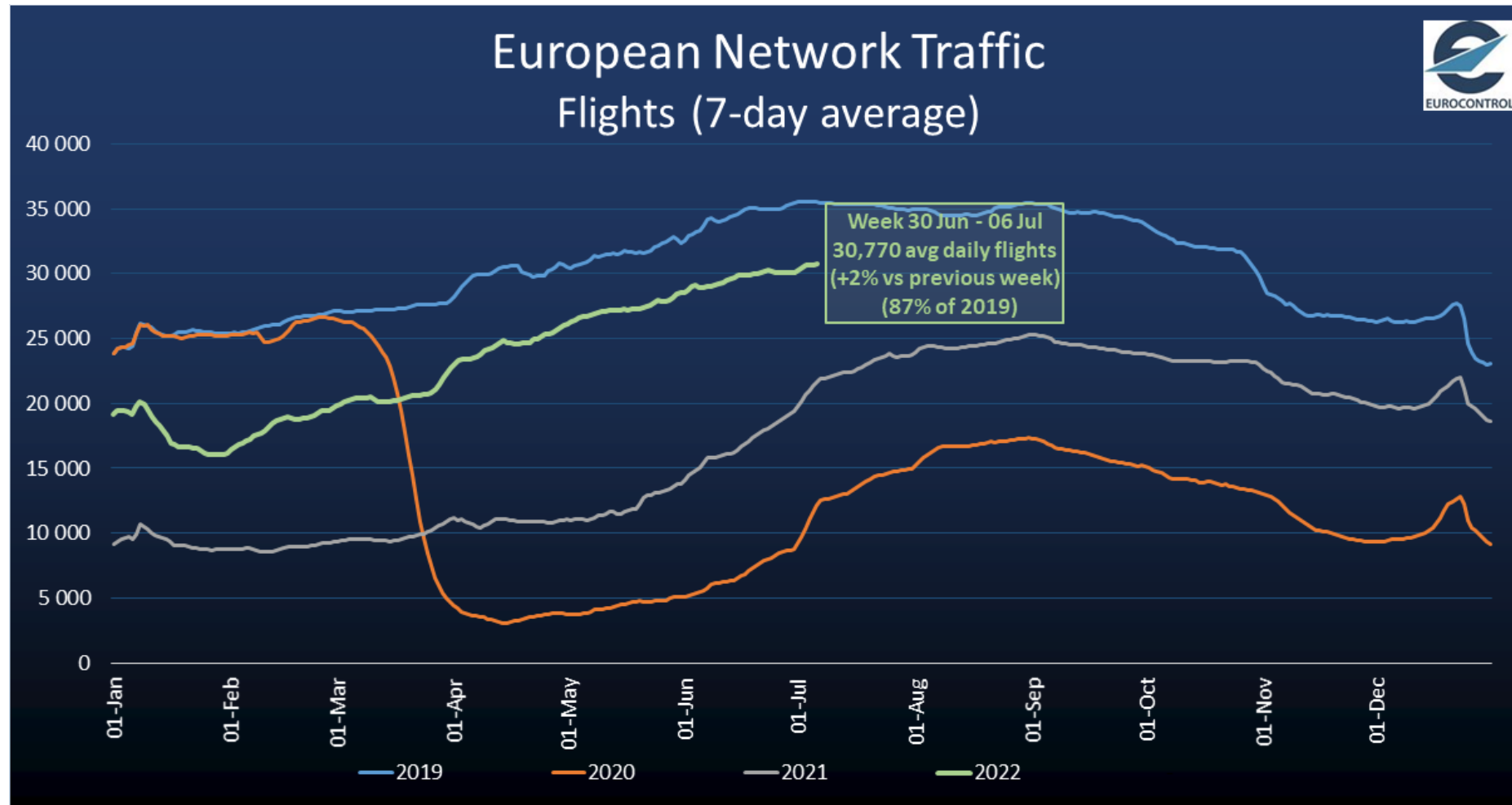
↓ **388**
cents/gallon
compared to
424 cents/gallon on 24 June 2022

Source: IATA/Platts

Overall traffic situation at network level

On week 30 Jun – 06 Jul:

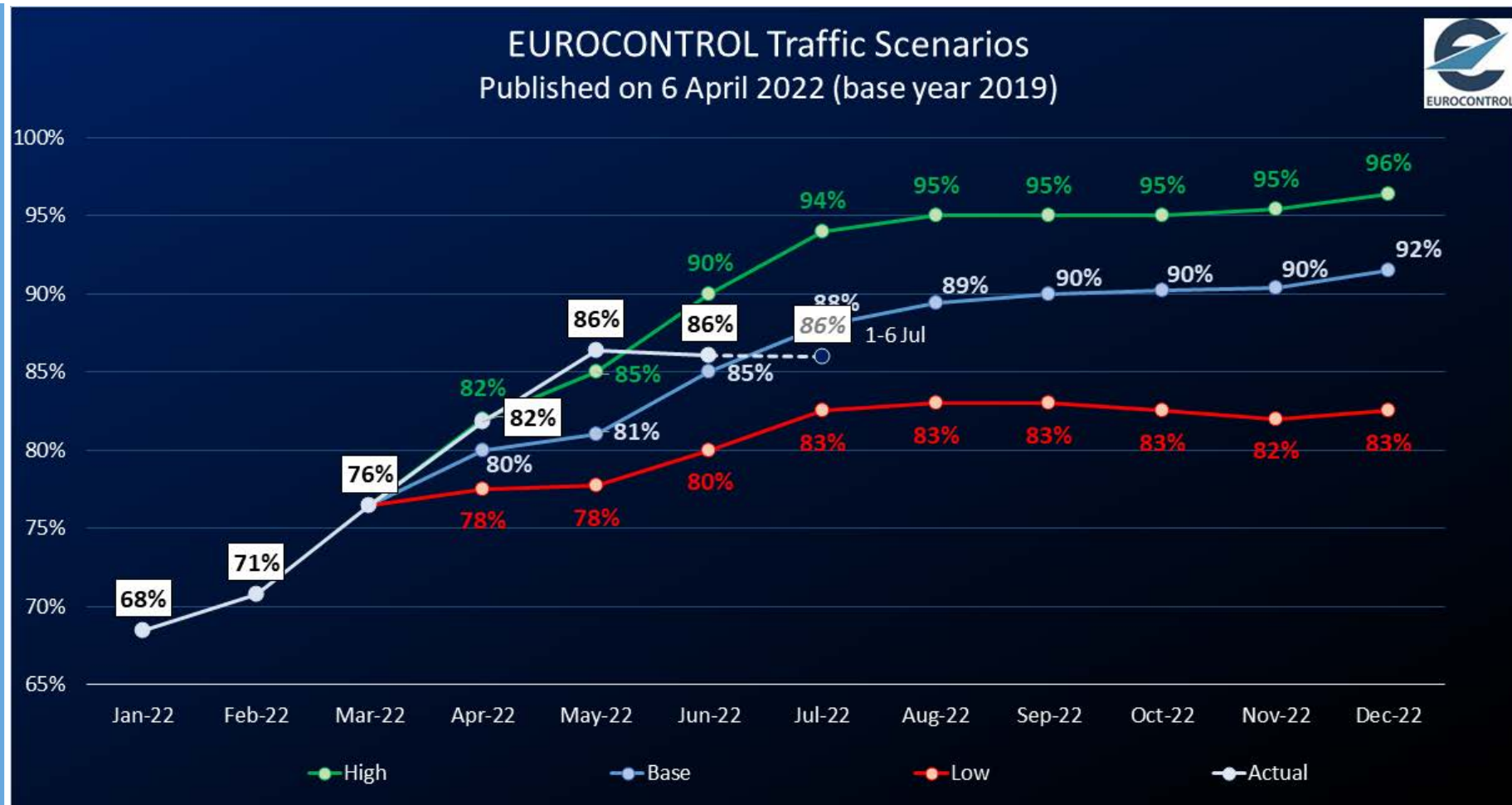
- ✘ **30,770** average daily flights.
- ✘ **+2%** on previous week.
- ✘ **87%** of 2019 traffic levels.
- ✘ Constant increase since mid April 2022.



Current situation compared to the latest EUROCONTROL traffic scenarios



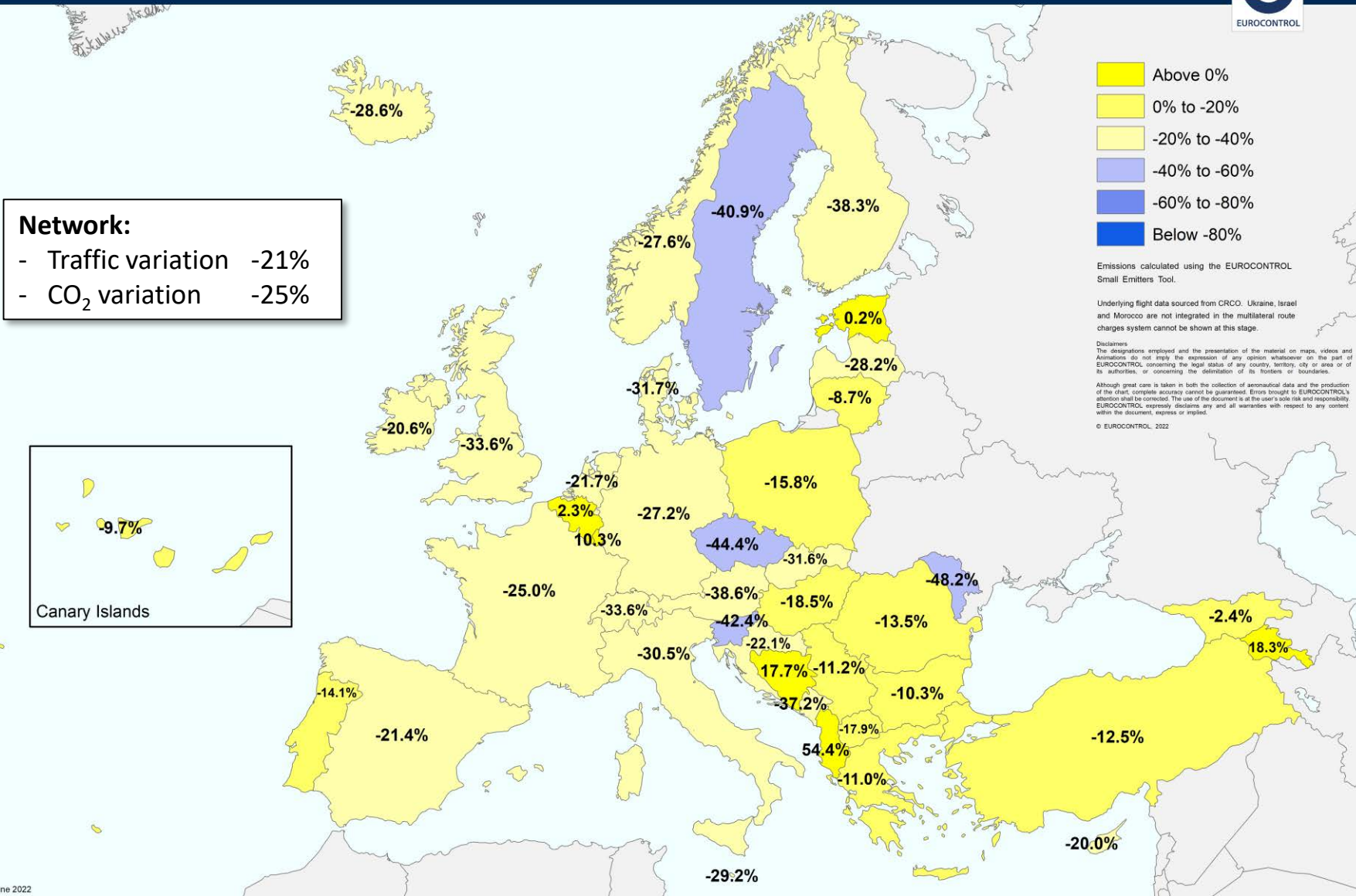
- ✘ The last EUROCONTROL Traffic scenarios have been published on 6 April 2022.
- ✘ For **June**, network traffic was at **86% of 2019** levels, in line with the base scenario. For the first days of July, network traffic is at 86% of 2019 levels, between the low and the base scenarios.
- ✘ On a year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



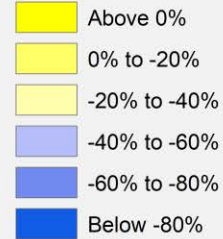
Aviation Sustainability



CO₂ variation Jan to May 2022 vs 2019 - Departing Flights



Network:
 - Traffic variation -21%
 - CO₂ variation -25%



Emissions calculated using the EUROCONTROL Small Emitters Tool.

Underlying flight data sourced from CRCO. Ukraine, Israel and Morocco are not integrated in the multilateral route charges system cannot be shown at this stage.

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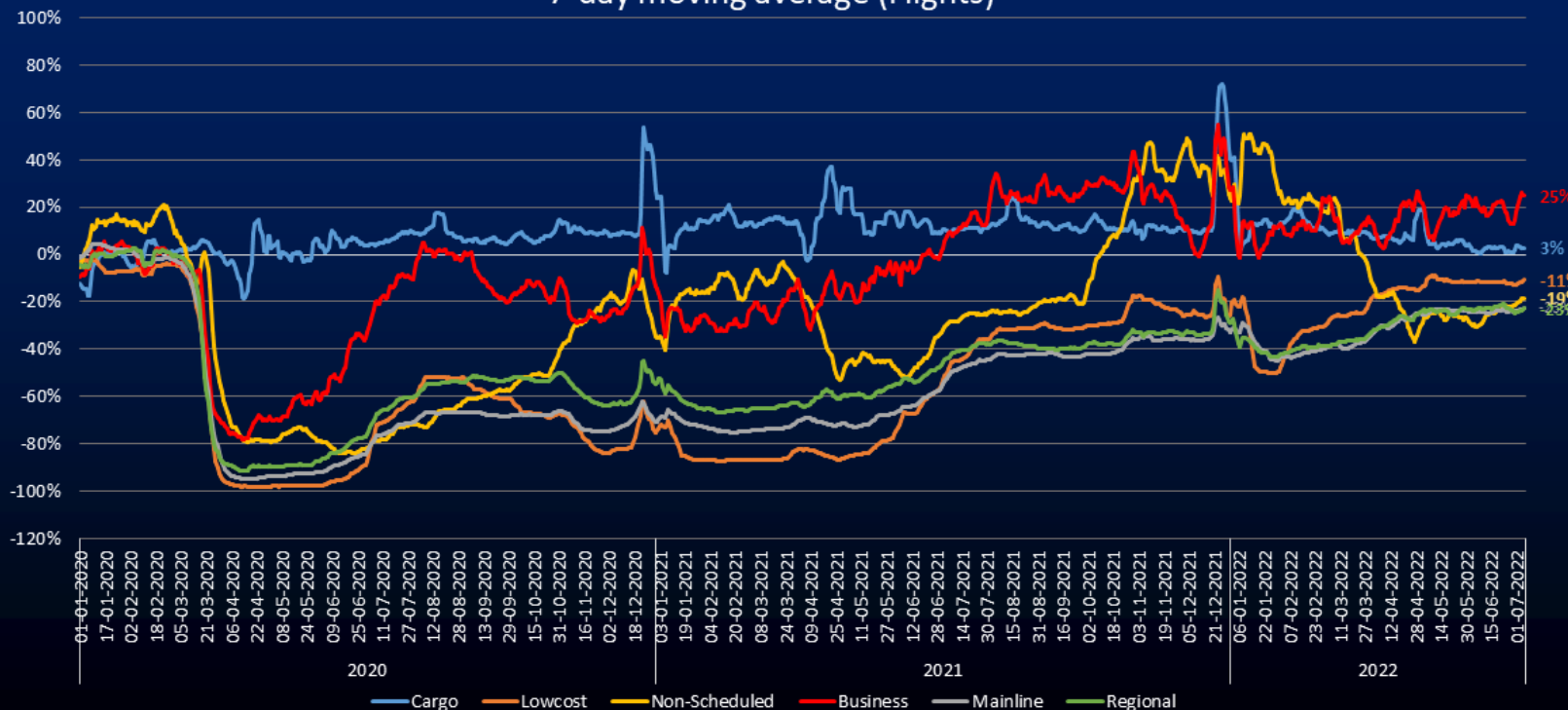
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Market Segments

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



Up until the 6th of July 2022, compared to 2019:

- ✘ Two segments are above or at 2019 levels: **All-cargo (+3%)** and **Business Aviation (+25%)**.
- ✘ **Low-Cost (-11%)** recorded a continuous increase at the beginning of 2022, stagnated since May, picking up very recently.
- ✘ **Charter (-19%)** decreased mainly since the start of the Russian invasion of Ukraine but is now slightly improving again with Summer holidays.
- ✘ **Mainline (-23%)** and **Regional (-23%)** 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 (30 Jun - 06 Jul 2022)		
	Average flights per day	% vs 2019	% over previous week
RYANAIR	2,996	+14%	+2%
easyJet	1,602	-15%	+4%
TURKISH AIRLINES	1,519	+4%	+1%
Lufthansa	1,164	-27%	+0%
AIRFRANCE	1,084	-19%	+1%
WIZZ	778	+17%	-1%
KLM Royal Dutch Airlines	760	-19%	-3%
vueling	706	-3%	+2%
BRITISH AIRWAYS	692	-29%	-4%
TUI	530	-15%	+5%

✘ **Ryanair** is the busiest Aircraft Operator with 2,996 flights per day on average over last week, followed by **easyJet** (1,602), **Turkish Airlines** (1,519), **Lufthansa** (1,164), **Air France** (1,084), **Wizz Air** (778) and **KLM** (760).

✘ The ranking remains unchanged compared to two weeks ago.

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

- ✘ **Ryanair** (+70 flights; +2%) mainly due to flows Belgium-Italy, Belgium-Spain and Belgium-France.
- ✘ **easyJet** (+63 flights; +4%) mainly due by far to Greece-Italy, followed by Greece-UK and Spain-UK.
- ✘ **Turkish Airlines** (+18 flights; +1%) mainly due by far to Türkiye-Türkiye, followed by Austria-Türkiye and Türkiye-UK.

Main decreases for:

- ✘ **British Airways** (-31 flights; -4%) mainly due to UK-UK, Germany-UK and France-UK.
- ✘ **KLM** (-26 flights; -3%) mainly due to German-Netherlands, followed by Netherlands-Spain, Netherlands-UK.

Aircraft operators (Average daily flights for the last week)

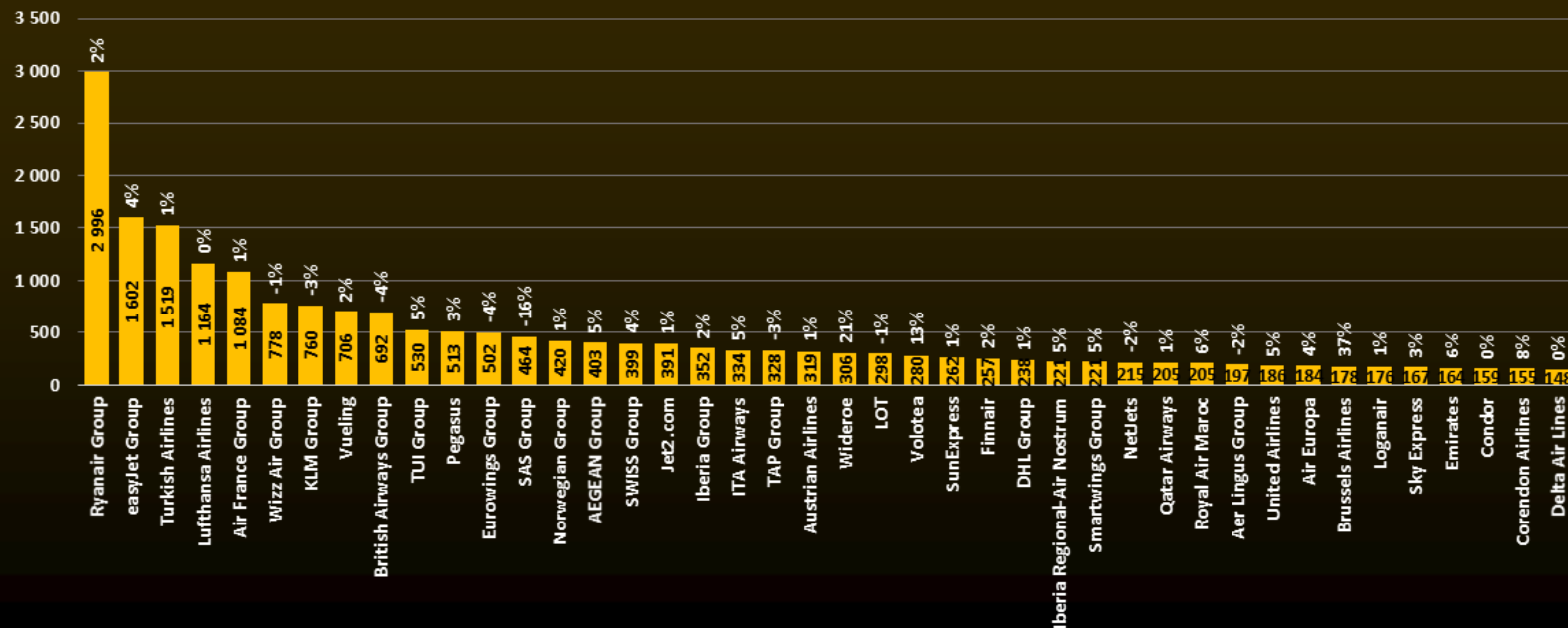
Top 40



Aircraft operators



Average daily flights for week 30 Jun - 06 Jul 2022 and comparison with previous week

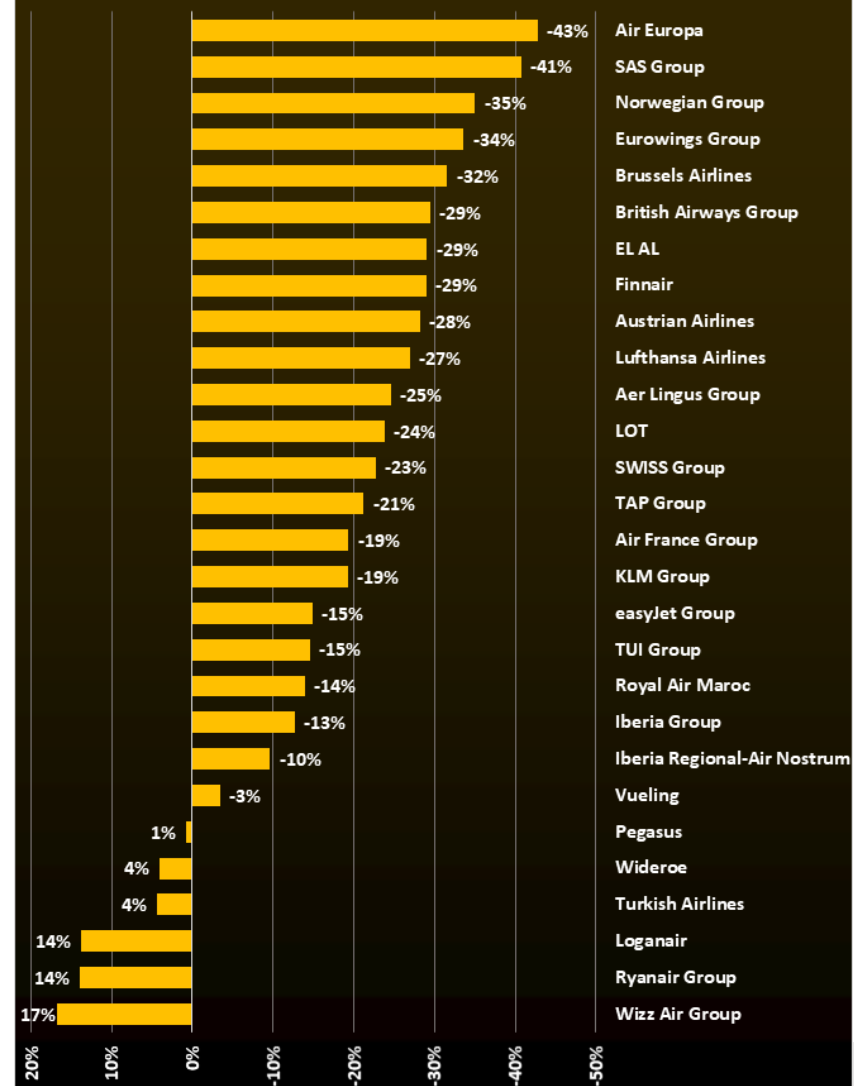


✘ Largest increases in flights vs previous week for **Ryanair (+2%)**, **easyJet (+4%)**, **Wideroe (+21%)**, **Brussels Airlines (+37%)**, **Volotea (+13%)** and **TUI (+5%)**.

✘ Highest decreases for **SAS (-16%)**, **British Airways (-4%)**, **KLM (-3%)** and **Eurowings (-4%)**.

✘ Traffic levels ranging from **-43% (Air Europa)** to **+17% (Wizz Air)** vs 2019.

Aircraft Operators in EUROCONTROL Network
(compared with equivalent week in 2019)
IFR Flights for Week 30 Jun - 06 Jul 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 30 June - 6 July 2022



PERFORMANCE OF MAJOR LOW-COST CARRIERS

for the week 30 June - 6 July 2022



PERFORMANCE OF MAJOR LONG-HAUL/LEGACY CARRIERS

for the week 30 June - 6 July 2022



PERFORMANCE OF MAJOR REGIONAL CARRIERS*

for the week 30 June - 6 July 2022



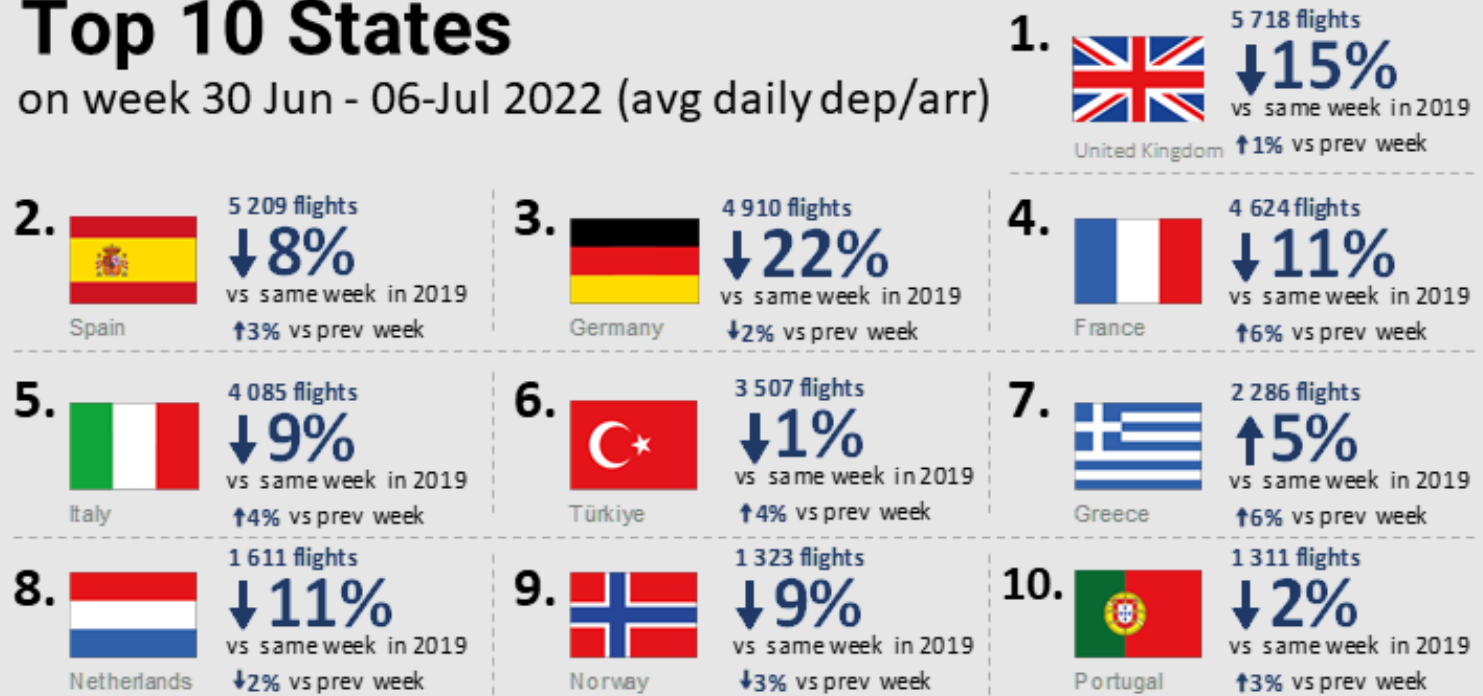
*REGIONAL AIRLINES USING SEPARATE IATA CODES

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



Top 10 States

on week 30 Jun - 06-Jul 2022 (avg daily dep/arr)



✘ **UK** is the State with the highest number of dep/arr flights on average over last week (5,718) followed by **Spain** (5,209), **Germany** (4,910), **France** (4,624) and **Italy** (4,085).

✘ Ranking remained unchanged compared to two weeks ago.

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

- ✘ **France** (+243 flights; +6%): mainly due to light AOs, Transavia and Volotea. Domestic flows, and flows with UK, Italy and Greece.
- ✘ **Italy** (+156 flights; +4%): Mainly due to light AOs, ITA and Volotea. Domestic flows as well as flows with Greece and Spain.
- ✘ **Spain** (+149 flights; +3%): Mainly Binter Canarias, Ryanair and Air Europa. Mainly flows with Spain, domestic flows and flows with Belgium.

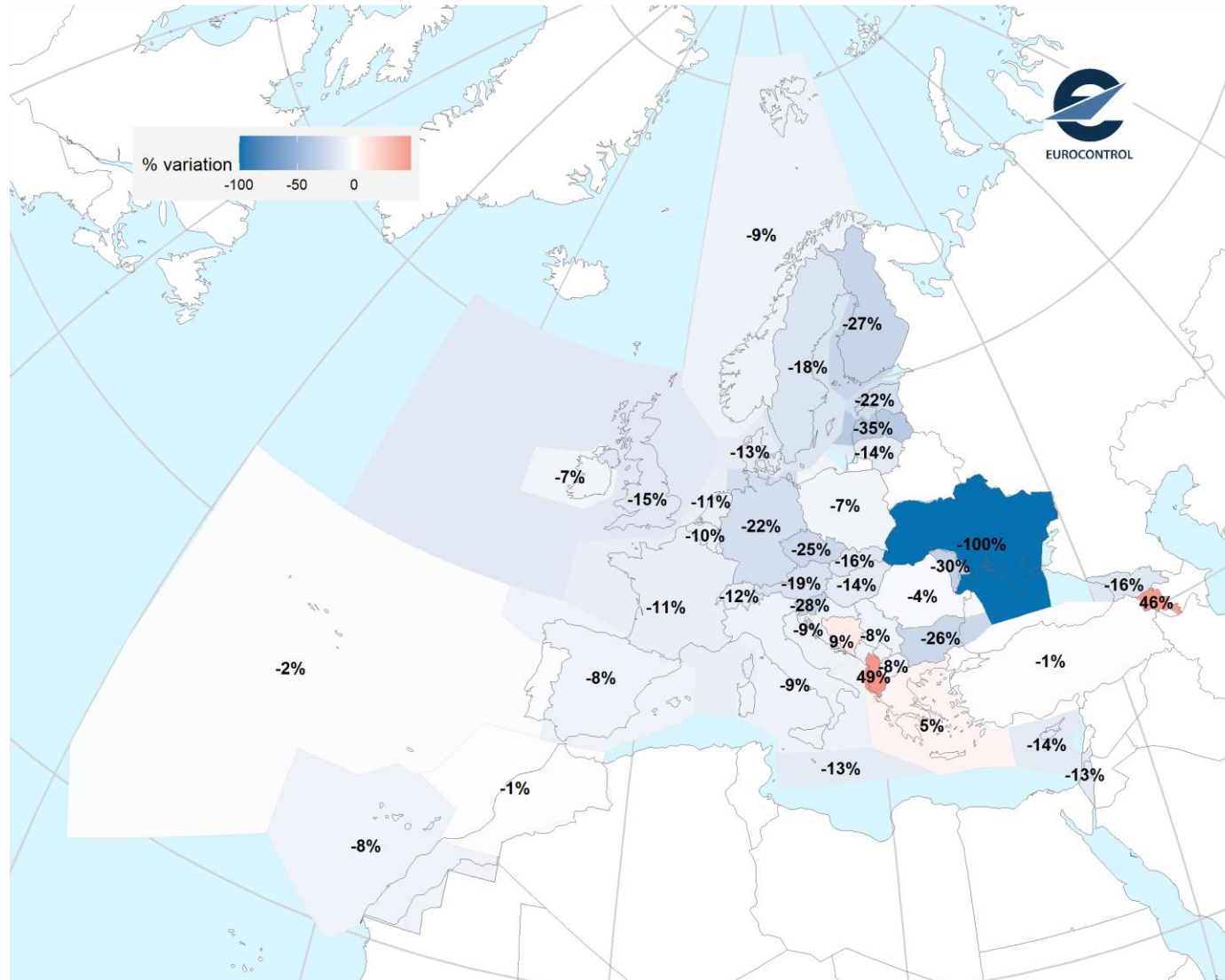
Main decreases:

- ✘ **Germany** (-89 flights; -2%): Mainly light AOs, followed by Eurowings and Lufthansa. Domestic flows and flows with UK.
- ✘ **Norway** (-37 flights; -3%): Mainly SAS, light AOs, Helicopter services, Bristow Norway. Domestic, Denmark and Netherlands.

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

State FIR daily % arrivals/departures variation vs 2019 on 2022-07-06

7-day average - FIRs at altitude FL200



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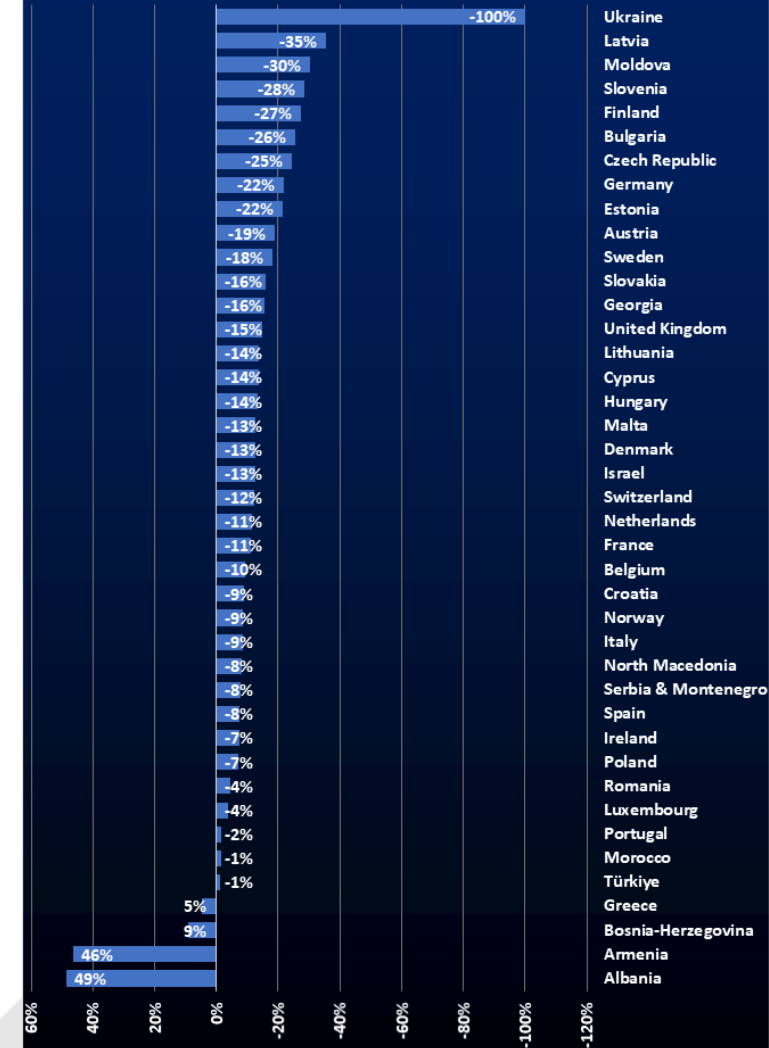
States (Average Daily Departure/Arrival flights for the last week)

Top 40



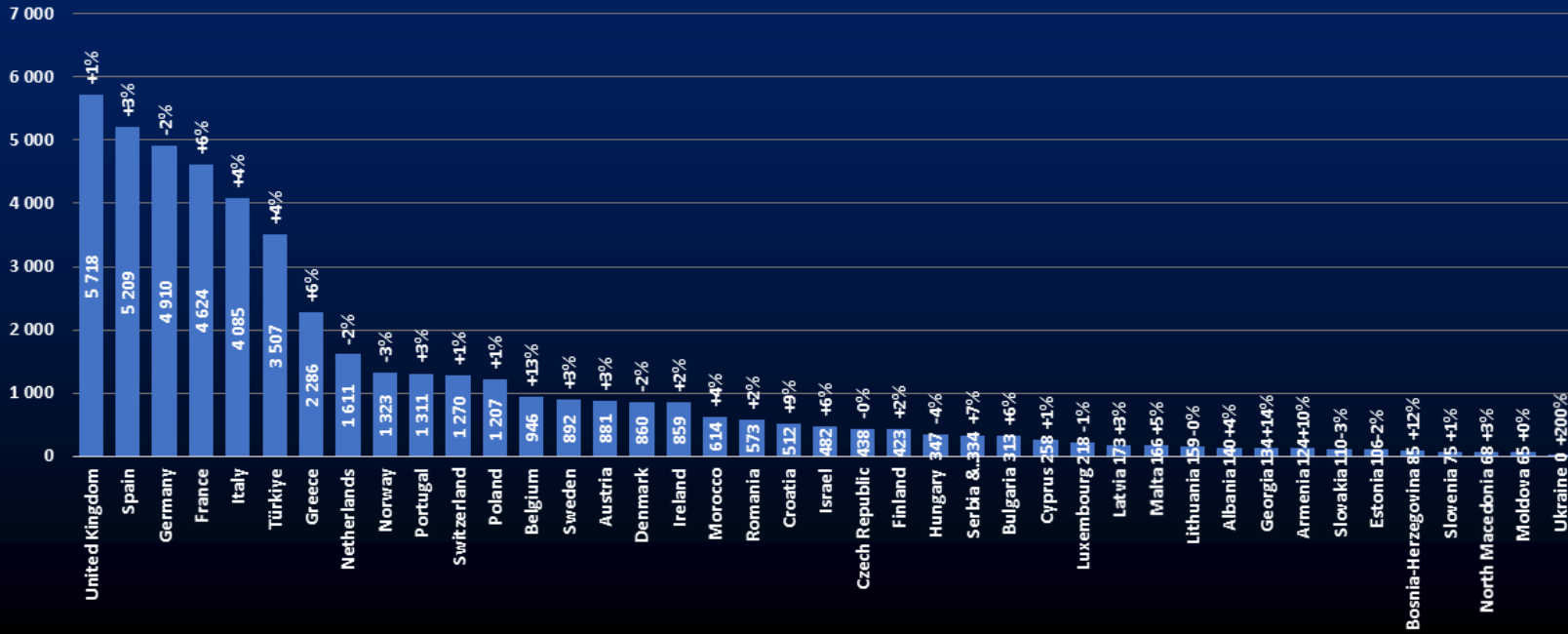
States in EUROCONTROL Network (compared with equivalent week in 2019)

IFR Dep/Arr Flights for Week 30 Jun - 06 Jul 2022



States (Dep/Arr flights)

Average daily flights for week 30 - 06 Jul 2022 and comparison with previous week

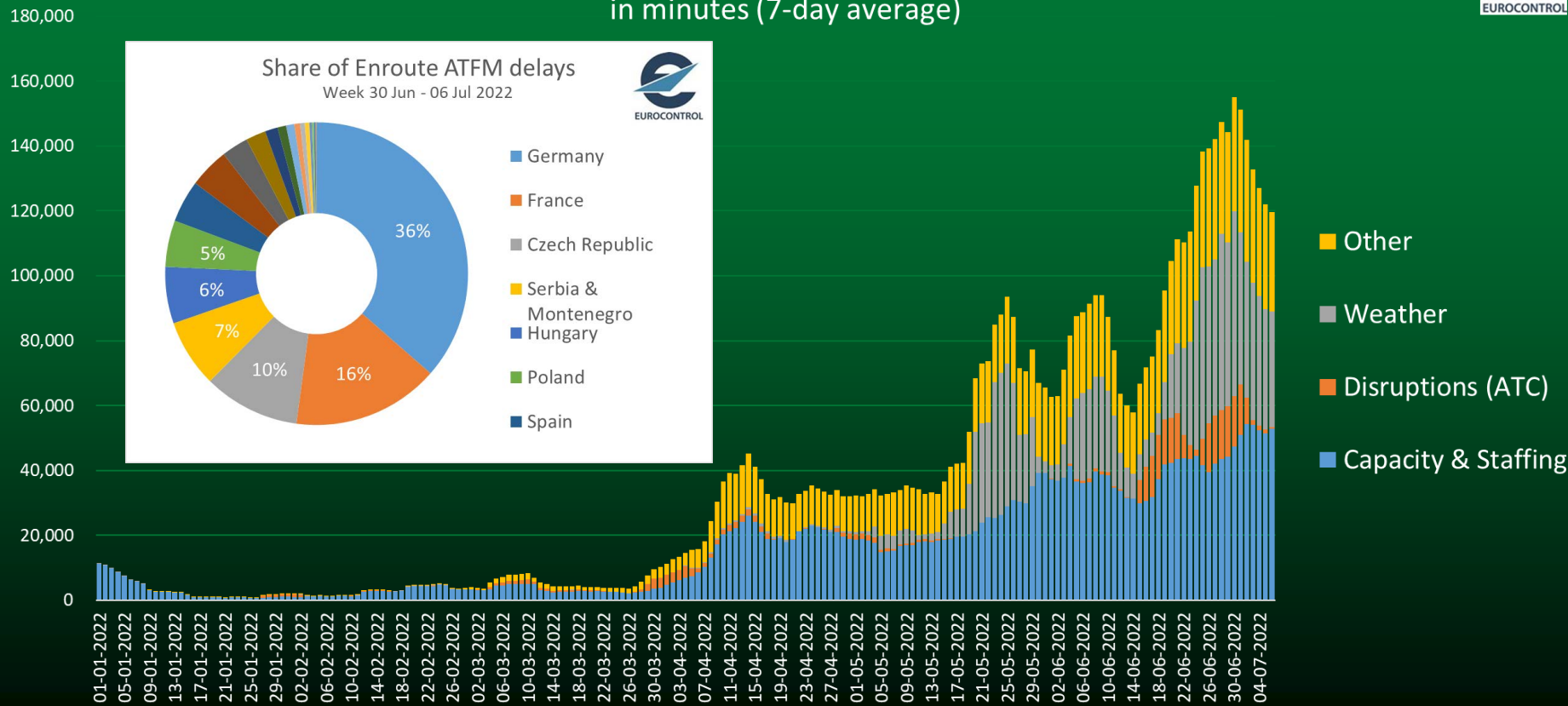


- ✗ Highest increases in flights vs previous week for **France (+6%)**, **Italy (+4%)**, **Spain (+3%)**, **Greece (+6%)**, **Türkiye (+4%)** and **Belgium (+13%)**.
- ✗ Highest decreases for **Germany (-2%)**, **Norway (-3%)** and **Netherlands (-2%)**.
- ✗ Traffic levels ranging from -100% (**Ukraine**) to +49% (**Albania**), compared to 2019.

En-route ATFM delays



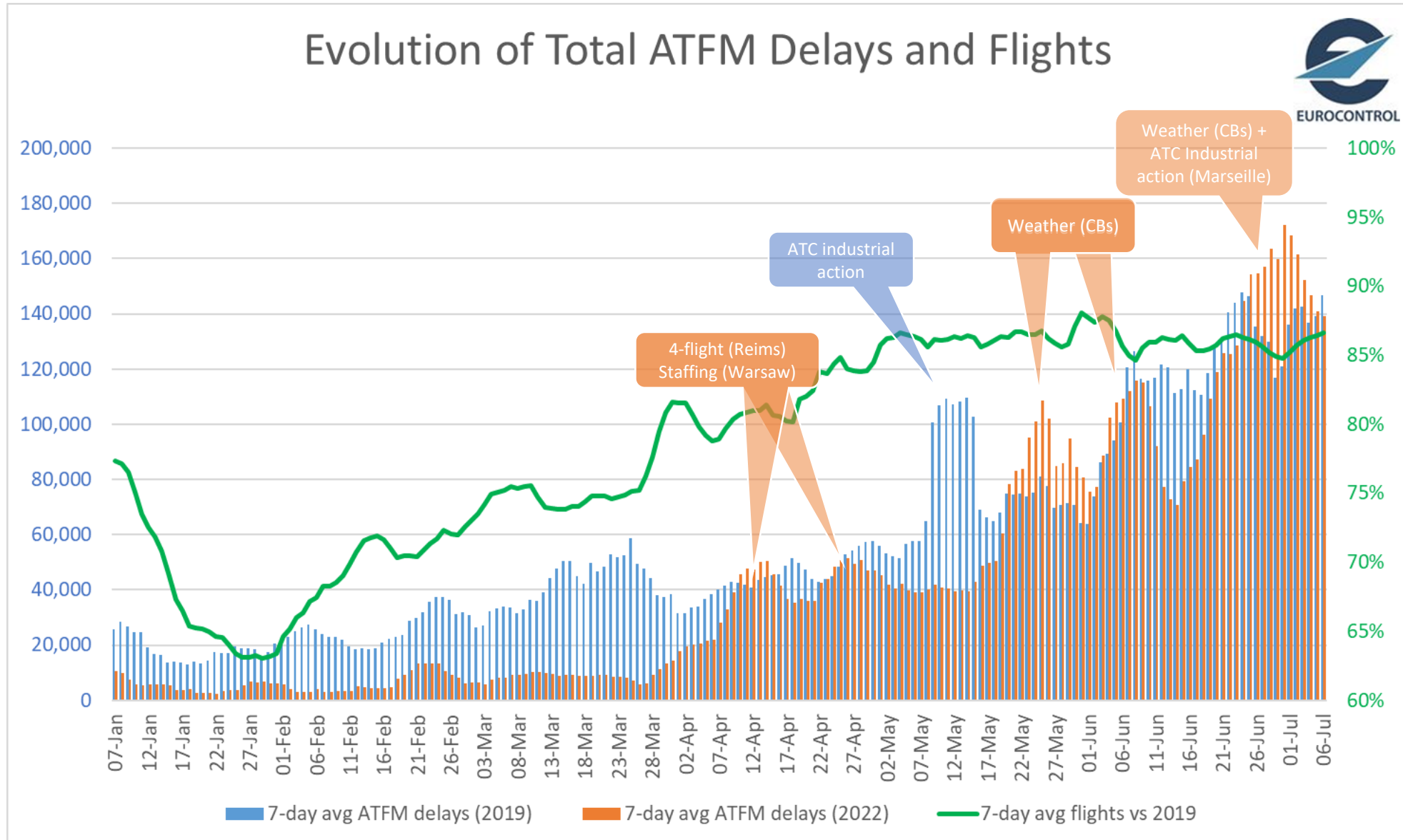
Enroute ATFM Delays (EUROCONTROL Area)
in minutes (7-day average)



✘ En-route ATFM delays have started to rise since end May 2022, reaching 2019 levels (see next slide). Recent days show a decrease of ATC disruptions.

✘ Major contributors over the last 7 days: **Germany** (36% of all en-route ATFM delays), **France** (16%), **Czech Republic** (10%), **Serbia&Montenegro** (7%), **Hungary** (6%) and **Poland** (5%).

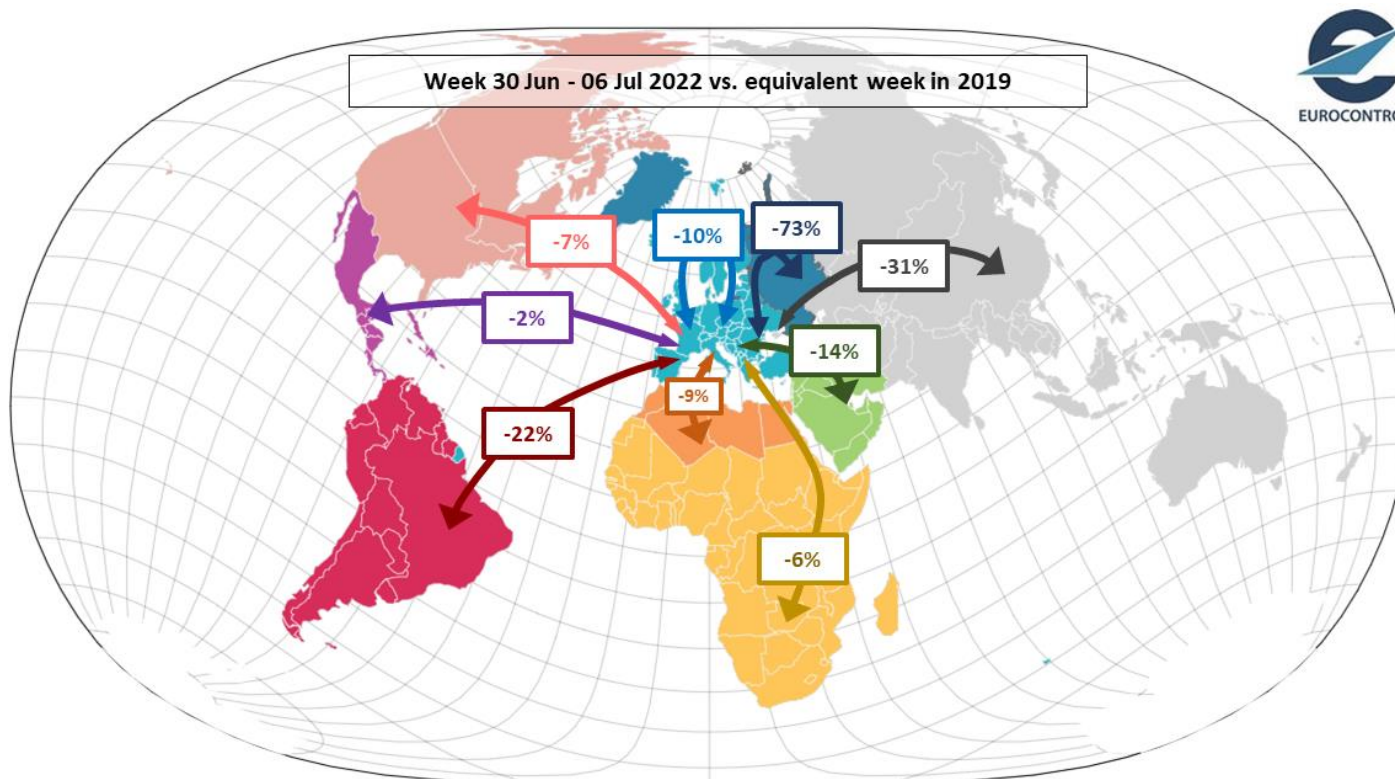
Total ATFM delays (All causes, airports and en-route) 2019 and 2022 (7-day average)



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

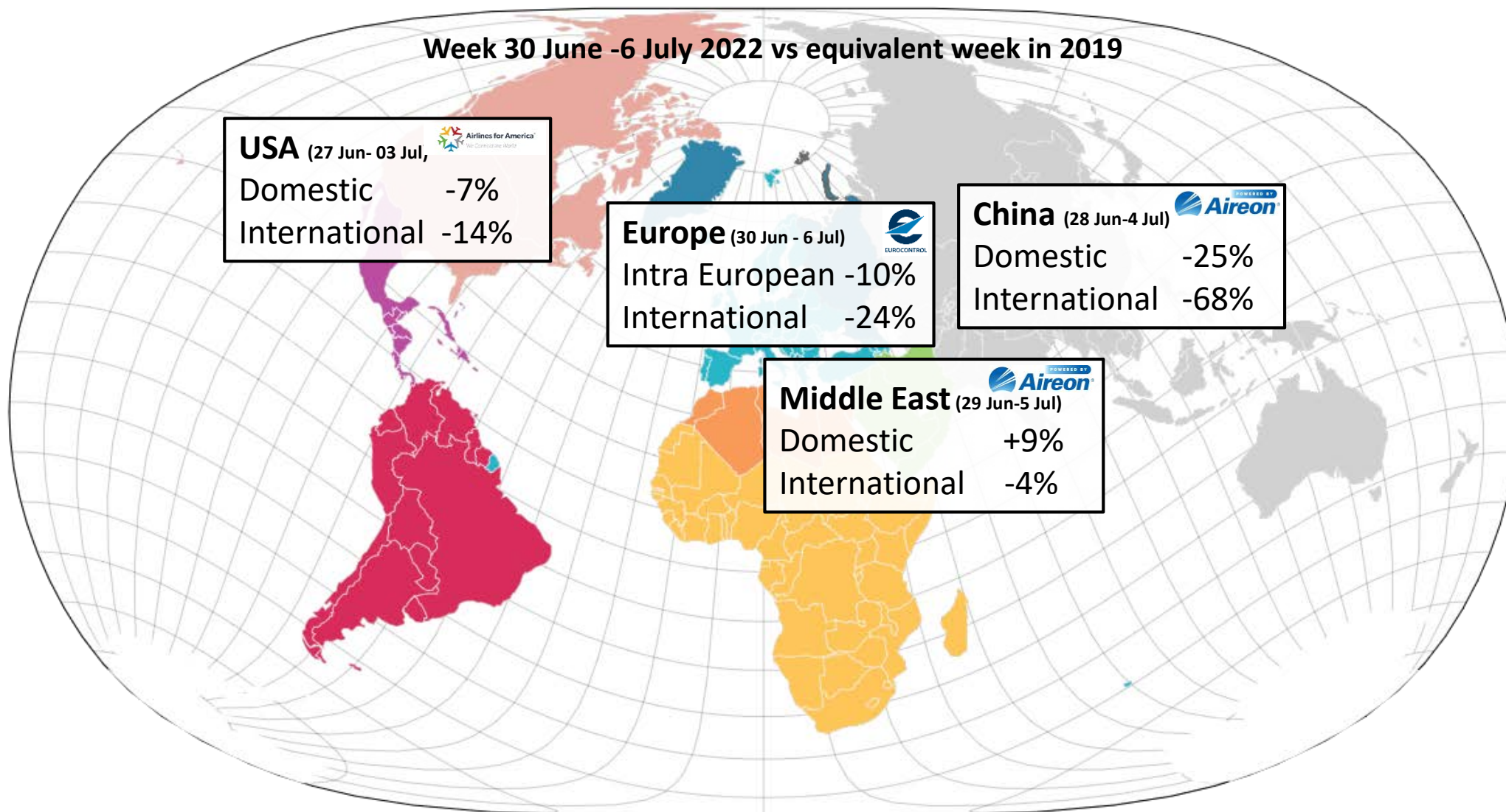


- ✘ The main traffic flow is the intra-Europe flow with 24,612 flights on average for the most recent week, increasing by 2% over the previous week.
- ✘ Flows between Europe and Other Europe (incl. Russia) are at -73% compared to 2019.
- ✘ Important lockdown in China, owing to a surge in COVID-19 cases affecting Chinese domestic flows (next slide).
- ✘ Intra-Europe flights are at -10% compared to 2019 while intercontinental flows are at -24%.



REGION (Average daily flights)	Week 23/06/2022 - 29/06/2022	Week 30/06/2022 - 06/07/2022	%	vs. 2019
Intra-Europe	24 155	24 612	+2%	-10%
Europe<->Asia/Pacific	577	575	-0%	-31%
Europe<->Mid-Atlantic	155	169	+9%	-2%
Europe<->Middle-East	1 314	1 437	+9%	-14%
Europe<->North Atlantic	1 348	1 353	+0%	-7%
Europe<->North-Africa	1 008	1 084	+8%	-9%
Europe<->Other Europe	345	360	+4%	-73%
Europe<->South-Atlantic	151	154	+2%	-22%
Europe<->Southern Africa	279	290	+4%	-6%
Non Intra-Europe	5 178	5 423	+5%	-24%

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 30 Jun - 06-Jul 2022						
	Airport-Pair	Avg daily flights	Δ vs prev. week	% vs prev. week	% vs 2019		
→	London/Heathrow <-> New York JFK	34	↘	-2	-5%	↘	-13%
→	London/Heathrow <-> Newark	19	→	+0	+1%	↗	+18%
→	London/Heathrow <-> Los Angeles	18	→	+0	+2%	→	+1%
↘	Paris/Charles-De-Gaulle <-> New York JFK	18	→	+0	+1%	↗	+13%
→	London/Heathrow <-> Chicago O Hare Intl	17	→	-0	-2%	↘	-6%
↗	London/Heathrow <-> Boston	14	→	+1	+6%	↘	-2%
↘	London/Heathrow <-> Dubai	14	→	+0	+0%	↘	-20%
↗	Frankfurt <-> Seoul/Inchon INTL	14	→	+0	+3%	↗	+56%
→	Paris/Charles-De-Gaulle <-> Montreal/Dorval	13	→	+0	+0%	↘	-6%
↘	London/Heathrow <-> San Francisco	13	→	-0	-2%	↗	+12%
↗	Madrid/Barajas <-> Bogota Intl/Eldorado	13	→	+1	+6%	↗	+17%
↗	Paris/Charles-De-Gaulle <-> Dubai	12	→	+0	+0%	↗	+23%
↘	London/Heathrow <-> Hamad INTL	12	→	-0	-2%	↘	-15%
↘	London/Heathrow <-> Singapore/Changi	12	→	-0	-2%	↘	-14%
→	London/Heathrow <-> Delhi	12	→	+0	+4%	↗	+16%
→	London/Heathrow <-> Washington	11	→	+1	+5%	↘	-5%
↘	Frankfurt <-> New York JFK	11	→	+0	+3%	↗	+19%
↗	Frankfurt <-> Chicago O Hare Intl	10	↗	+1	+16%	↘	-11%
↘	Milan/Malpensa <-> New York JFK	10	→	-0	-3%	↗	+3%
↗	Paris/Orly <-> Pointe-A-Pitre/Le Ra	10	↗	+3	+51%	↘	-14%

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

Slight changes over the last week with:

Increases for:

- ✘ Paris/Orly – Guadeloupe (+3 flights)
- ✘ Frankfurt – Chicago (+1 flight)
- ✘ London Heathrow – Washington (+1 flight)
- ✘ Madrid – Bogota (+1 flight)
- ✘ London/Heathrow – Boston (+1 flight)

Decreases for:

- ✘ London/Heathrow – New York JFK (-2 flight)

Country pairs (Average Daily flights for the last week)

Top 10



Rank evolution over prev. week	Top 10 Country-Pair on week 30 Jun - 06-Jul 2022				
	Country-Pair	Avg daily flights	Δ vs prev. week	% vs prev. week	% vs 2019
→	Spain <-> Spain	1 303	↗ +15	+1%	↘ -2%
→	France <-> France	1 103	↗ +53	+5%	↘ -14%
→	Italy <-> Italy	1 013	↗ +26	+3%	↗ +2%
→	Spain <-> United Kingdom	904	↗ +9	+1%	↘ -11%
→	Türkiye <-> Türkiye	871	↗ +6	+1%	↘ -10%
→	United Kingdom <-> United Kingdom	834	↘ -25	-3%	↘ -22%
→	Norway <-> Norway	666	↘ -3	-0%	→ -0%
→	Germany <-> Germany	585	↘ -48	-8%	↘ -39%
→	Germany <-> Spain	575	↘ -6	-1%	↘ -11%
→	Germany <-> Türkiye	454	↗ +2	+1%	↗ +10%

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

✘ **Spain-Spain** is the country-pair with the highest number of dep/arr flights (1,303) followed by **France-France** (1,103), **Italy-Italy** (1,013), **Spain-UK** (904), **Türkiye-Türkiye** (871), **UK-UK** (834), **Norway-Norway** (666) and **Germany-Germany** (585).

✘ The rankings remained stable over previous week.

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

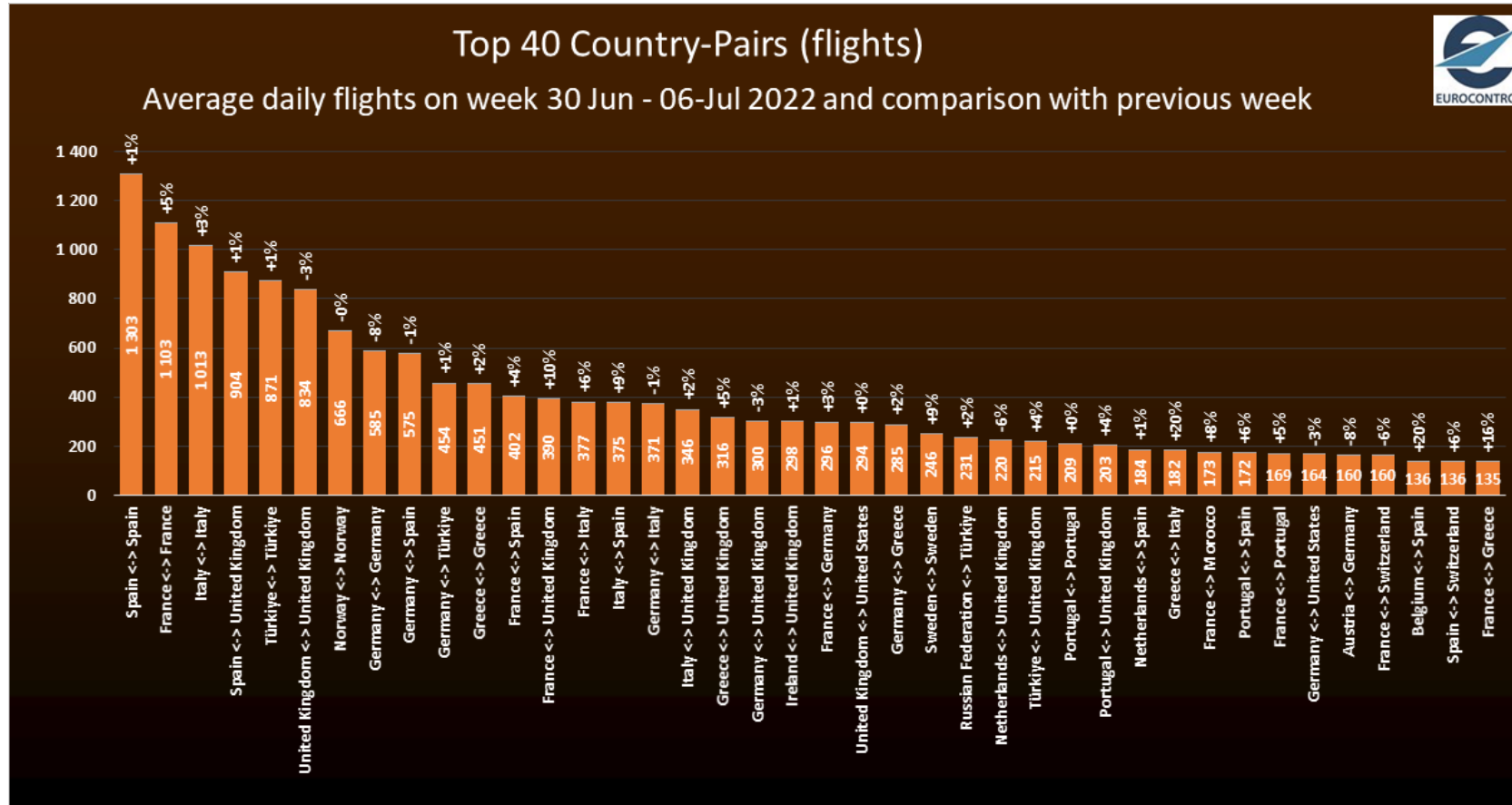
- ✘ **France-France** (+53 flights; +5%) mainly due to light AOs, Volotea and training flights.
- ✘ **Italy-Italy** (+26 flights; +3%): mainly due to ITA, Volotea, military flights and NetJets.
- ✘ **Spain-Spain** (+15 flights; +1%): mainly due to Binter Canarias, Air Europa and Ryanair.

Decreases for:

- ✘ **Germany-Germany** (-48 flights; -8%): mainly due to Lufthansa, light AOs and Eurowings.
- ✘ **UK-UK** (-25 flights; -3%): mainly due to light AOs, British Airways and Gama Aviation UK.

Country pairs (Average Daily flights for the last week)

Top 40



- ✘ Highest increase in flights vs previous week for **France-France (+5%)**, **France-UK (+10%)**, **Italy-Spain (+9%)**, **Greece-Italy (+20%)**, **Italy-Italy (+3%)**, **Belgium-Spain (+20%)** and **France-Italy (+6%)**.
- ✘ Highest decrease in flights vs previous week for **Germany-Germany (-8%)**, **UK-UK (-3%)**, **Netherlands-UK (-6%)** and **Austria-Germany (-8%)**.

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



Top 10

Rank evolution over prev. Week	Top 10 Airports on week 30 Jun - 06 Jul 2022				
	Airport	Average Daily Dep/Arr Flights	Δ over prev. week	% over prev. week	% vs 2019
→	IGA Istanbul Airport	1 355	↗ +27	+2%	↗ +7%
→	Amsterdam	1 267	↘ -21	-2%	↘ -15%
→	Paris/Charles-De-Gaulle	1 228	↘ -32	-3%	↘ -19%
→	Frankfurt	1 166	↘ -5	-0%	↘ -24%
→	London/Heathrow	1 132	↘ -28	-2%	↘ -17%
→	Madrid/Barajas	1 051	↗ +20	+2%	↘ -17%
↗	Barcelona	918	↗ +29	+3%	↘ -15%
↘	Palma De Mallorca	908	↗ +11	+1%	↘ -1%
↗	Antalya	904	↗ +46	+5%	↘ -3%
↘	Munich	855	↘ -10	-1%	↘ -31%

✂ **IGA Istanbul** is the airport with the highest number of dep/arr flights (1,355) followed by **Amsterdam** (1,267), **Paris CDG** (1,228), **Frankfurt** (1,166) and **London Heathrow** (1,132).

✂ **IGA Istanbul** is now the busiest airport in Europe, recording more flights than in 2019 (over the same week).

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

- ✂ **Antalya** (+46 flights; +5%): mainly due to Turkish Airlines, light AOs, Corendon and Freebird. Flows with UK, Austria, Belgium and Switzerland.
- ✂ **Barcelona** (+29 flights; +3%): mainly due to Vueling, light AOs, Ryanair and Lufthansa. Domestic flows as well as flows with Italy, Germany and Switzerland.
- ✂ **IGA Istanbul** (+27 flights; +2%): mainly due light AOs, Turkish Airlines and Iraqi Airways. Flows with Iraq, Jordan, Iran, UK and Algeria.

Decreases for:

- ✂ **Paris/CDG** (-32 flights; -3%): mainly due to Air France and easyJet. Domestic flows and flows with Germany and Italy.

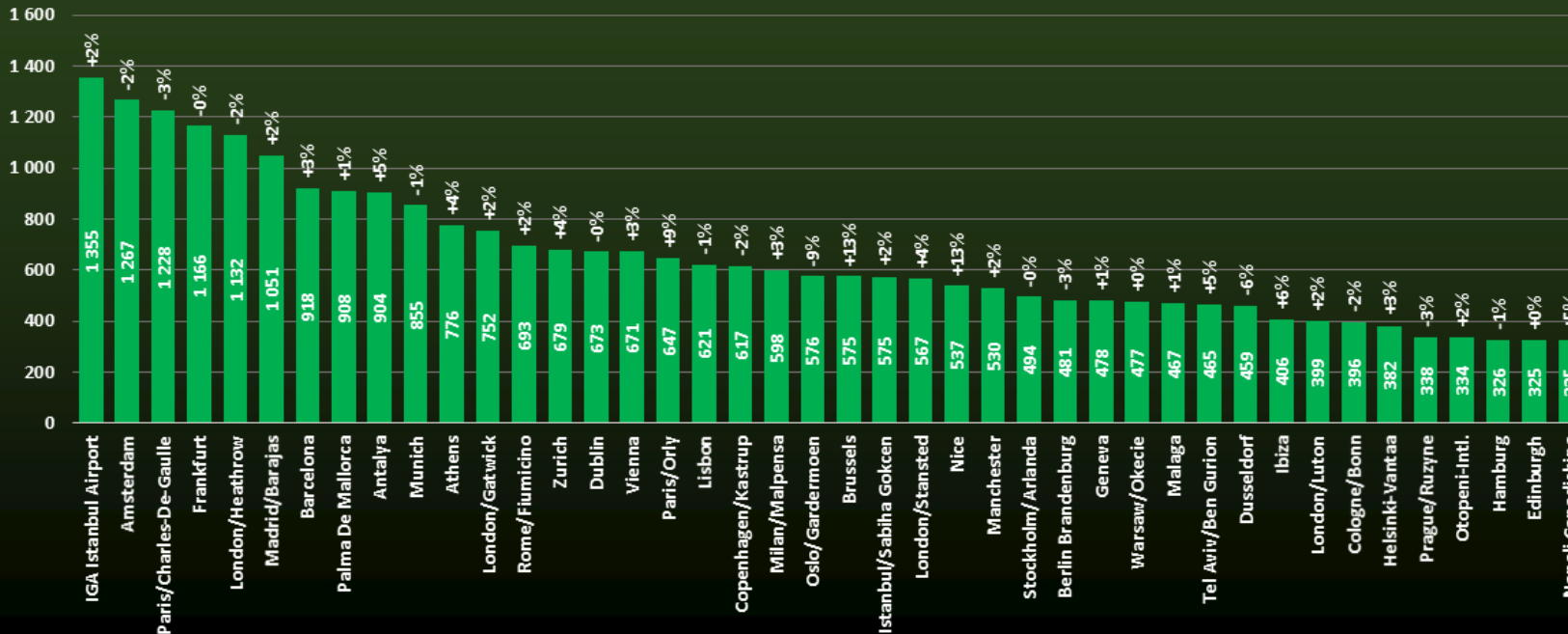
Airports (Average Daily Departure/Arrival flights for the last week)

Top 40



Top 40 Airports (Dep/Arr flights)

Average daily flights for week 30 Jun - 06 Jul 2022 and comparison with previous week

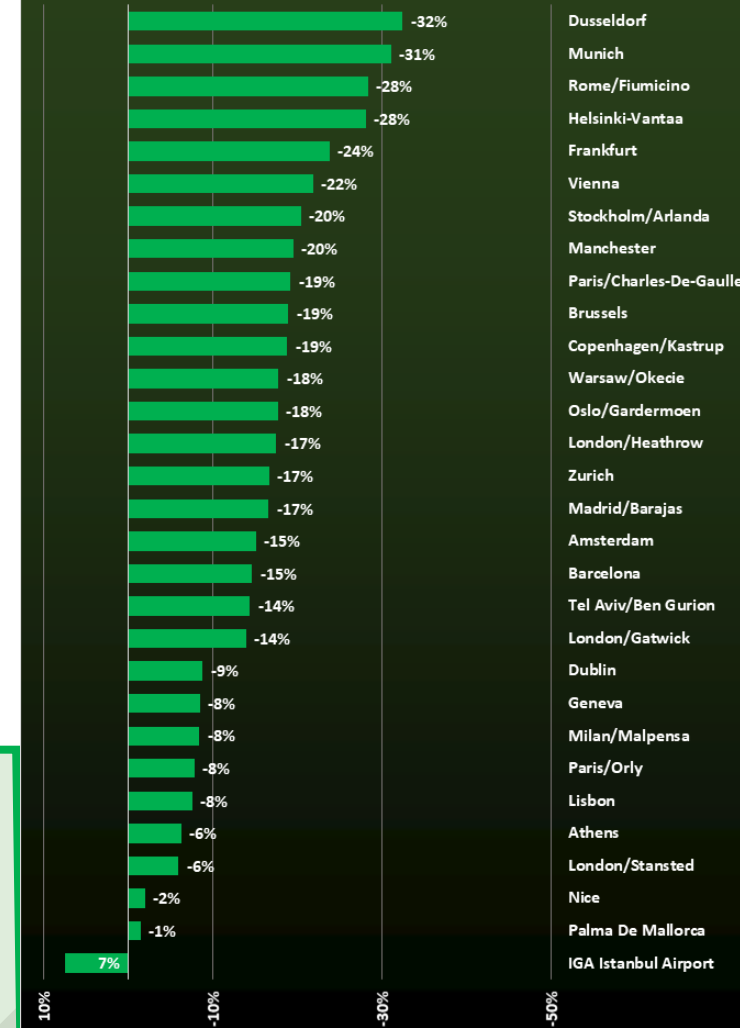


- ✦ Highest increases in flights vs the previous week for **Brussels (+13%)**, **Nice (+13%)**, **Paris/Orly (+9%)**, **Antalya (+5%)**, **Athens (+4%)**, **Barcelona (+3%)**, **IGA Istanbul (+2%)**.
- ✦ Highest decreases for **Oslo (-9%)** and **Paris/CDG (-3%)**.
- ✦ Traffic levels ranging from -32% (Dusseldorf) to +7% (IGA Istanbul) compared to 2019.

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



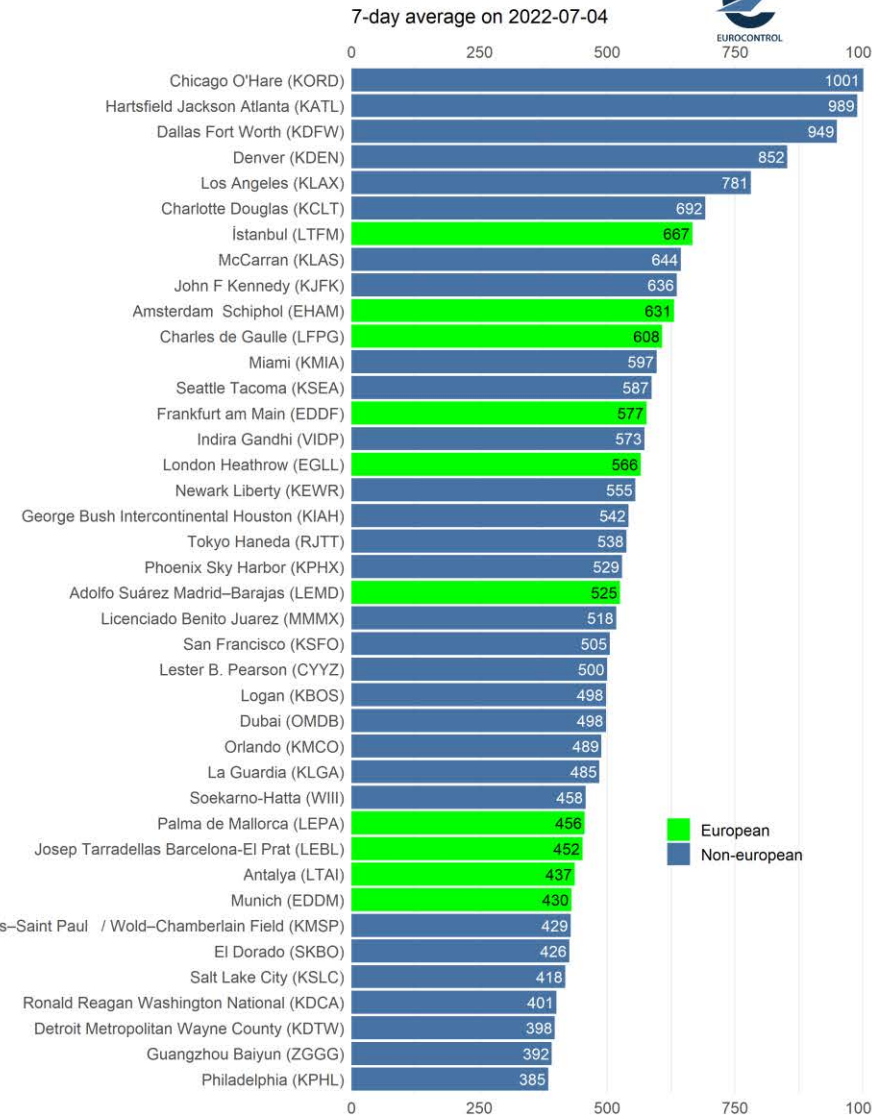
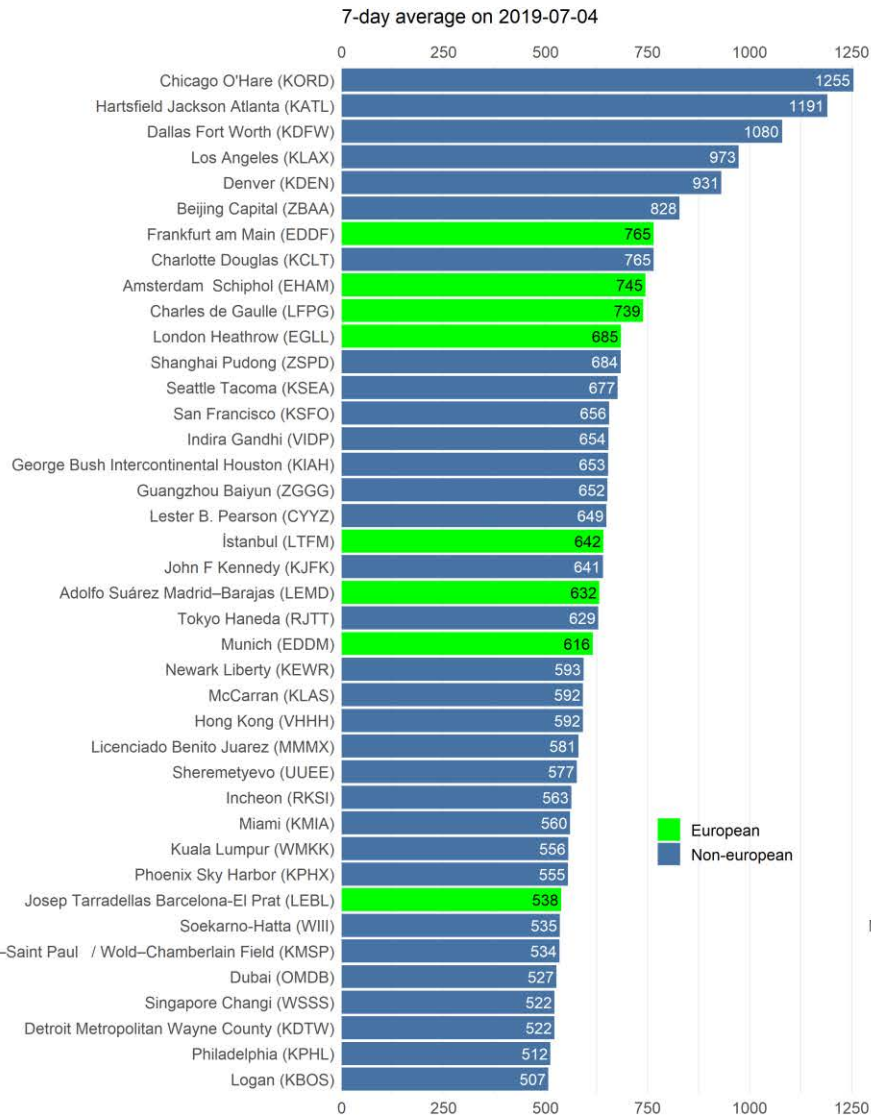
IFR Dep/Arr Flights for Week 30 Jun - 06 Jul 2022



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):

- ✘ **10 European airports** are ranked in the **Top 40** global airports (vs 8 in 2019)
- ✘ **Two European airports** are in the Top 10: Istanbul IGA (7th) and Amsterdam (10th).
- ✘ Paris CDG, Frankfurt and London Heathrow are in the **Top 16**.
- ✘ Ten of the Top 15 global airports are currently **based in the US**.
- ✘ The **first Asian airport in 2022** is **New Delhi (15th)**.

Source: Flightradar24 Historical Global Utilisation data



Jet Fuel Price Europe



Source: IATA/Platts

✖ **Jet fuel prices** dropped to 388 cts/gallon on 1 July (-9% over two weeks) amid concerns about an economic recession.

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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