Headlines (Week of 8 — 14 September 2022)

- **30,293 daily flights** on average over past week (decrease of 1% on previous week); 87% of 2019 levels.
- Network traffic (flights) is below the base EUROCONTROL Traffic Scenario: 87% for 1-14 September (vs 2019). On a year-to-date basis, 2022 reached 82% of 2019 levels.
- With the back-to-school period start, north-to-south European flows are now levelling off (Greece, Spain, Türkiye, Italy), on a week-on-week basis.
- **Ryanair** was the busiest aircraft operator last week with 2,989 flights per day on average (+15% vs 2019), followed by easyJet (1,632; -14% vs 2019), Turkish Airlines (1,463; -3% vs 2019), Lufthansa (1,176; -27% vs 2019), Air France (1,078; -16% vs 2019), Wizz Air (823; +22% vs 2019) and KLM (774; -19% vs 2019).
- Intra-regional/Domestic traffic vs 2019: Europe is still below (-11%), USA (-15%), China (-57%) and Middle-East (-5%).
- **Two** European airports (Amsterdam and Paris CDG) are in the Top 10 Global airports.
- Arrival punctuality (within 15 minutes) is close to 67% while departure punctuality is just below 60%.
- In recent days, ATFM delays were above 2019, mostly caused by Weather.
- Jet fuel prices decreased to 339 cts/gallon on 9 September (-11% over two weeks, +45% since early January).

Traffic Situation
Average daily flights (including overflights)
On week 08 - 14 Sep 2022

- 87% of equivalent week in 2019

Top 10 Busiest States
on week 08 - 14 Sep 2022 (avg daily flights)
(Dep/Arr flights and comparison with previous week)

<table>
<thead>
<tr>
<th>Country</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>US</td>
<td>+3%</td>
</tr>
<tr>
<td>Germany</td>
<td>+1%</td>
</tr>
<tr>
<td>France</td>
<td>-1%</td>
</tr>
<tr>
<td>Spain</td>
<td>+1%</td>
</tr>
<tr>
<td>China</td>
<td>-4%</td>
</tr>
<tr>
<td>Russia</td>
<td>-5%</td>
</tr>
<tr>
<td>UK</td>
<td>+2%</td>
</tr>
<tr>
<td>Australia</td>
<td>+9%</td>
</tr>
<tr>
<td>Japan</td>
<td>-1%</td>
</tr>
</tbody>
</table>

Top 10 Aircraft Operators
on Week 08 - 14 Sep 2022 (avg daily flights)

<table>
<thead>
<tr>
<th>Operator</th>
<th>Flights</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ryanair Group</td>
<td>2,989</td>
<td>+15%</td>
</tr>
<tr>
<td>easyJet Group</td>
<td>1,632</td>
<td>-14%</td>
</tr>
<tr>
<td>Turkish Airlines</td>
<td>1,463</td>
<td>-3%</td>
</tr>
<tr>
<td>Lufthansa</td>
<td>1,176</td>
<td>-27%</td>
</tr>
<tr>
<td>Air France</td>
<td>1,078</td>
<td>-16%</td>
</tr>
<tr>
<td>Wizz Air</td>
<td>823</td>
<td>+22%</td>
</tr>
<tr>
<td>KLM Group</td>
<td>774</td>
<td>-19%</td>
</tr>
<tr>
<td>British Airways</td>
<td>710</td>
<td>-11%</td>
</tr>
<tr>
<td>Vueling</td>
<td>708</td>
<td>+2%</td>
</tr>
<tr>
<td>SAS Group</td>
<td>654</td>
<td>-1%</td>
</tr>
</tbody>
</table>
TOP 10 AIRPORTS, FLOWS, MARKET SEGMENTS, ROUTE CHARGES & FUEL PRICES

Traffic Flow
Average daily flights on week of 08 - 14 Sep 2022

<table>
<thead>
<tr>
<th>Flights</th>
<th>vs previous week</th>
<th>vs 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intra-European</td>
<td>24,267</td>
<td>-0%</td>
</tr>
<tr>
<td>Intercontinental</td>
<td>5,305</td>
<td>-2%</td>
</tr>
</tbody>
</table>

Route charges
(August 2022)
Amount billed: €805 million
Jan-Aug 2022 amount billed: €4,997 million
vs. Jan-Aug 2019 -6%
Source: EUROCONTROL

Economics
(9 September 2022)
Fuel price
339 cents/gallon compared to
379 cents/gallon on 26 August 2022
Source: IATA/Platts

Market Segments
on week 08 – 14 Sep 2022 (vs 2019)
- 8% Low cost
- 21% Mainline
- 24% Regional
- 19% Business Aviation
- 16% Non-Scheduled/Charter
- 2% All Cargo

Fuel price
339 cents/gallon compared to
379 cents/gallon on 26 August 2022
Source: IATA/Platts

Amount billed:
Jan-Aug 2022 amount billed:
Source: EUROCONTROL
OVERALL TRAFFIC SITUATION AT NETWORK LEVEL

On week 8 Sep – 14 Sep:

- **30,293** average daily flights.
- **-1%** on previous week.
- **87%** of 2019 traffic levels.
- Stabilisation, since early July 2022, to just above 30,000 flights per day in the network.
The last EUROCONTROL Traffic scenarios have been published on 6 April 2022.

Since the beginning of September, network traffic (flights) is at 87% of 2019 levels, below the base scenario.

On a year to date basis, network traffic in 2022 stands at 82% of 2019.
AVIATION SUSTAINABILITY

Network:
- Traffic variation  -18%
- CO₂ variation  -22%
Mid-September 2022, compared to 2019:

- Two segments are above 2019 levels: Business Aviation (+19%) and All-cargo (+2%).
- Low-Cost (-8%) recorded a continuous increase at the beginning of 2022 but are now stable.
- Mainline (-21%) and Regional (-24%) have been recovering since the beginning of 2022 but are now stable since July (vs 2019).

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)

<table>
<thead>
<tr>
<th>Top 10 Aircraft Operators</th>
<th>Week (08 - 14 Sep 2022)</th>
<th>% vs 2019</th>
<th>% over previous week</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>RYANAIR</strong></td>
<td>2,989</td>
<td>+15%</td>
<td>-0%</td>
</tr>
<tr>
<td><strong>easyJet</strong></td>
<td>1,632</td>
<td>-14%</td>
<td>-2%</td>
</tr>
<tr>
<td><strong>Turkish Airlines</strong></td>
<td>1,463</td>
<td>+3%</td>
<td>-4%</td>
</tr>
<tr>
<td><strong>Lufthansa</strong></td>
<td>1,176</td>
<td>-27%</td>
<td>+12%</td>
</tr>
<tr>
<td><strong>Air France</strong></td>
<td>1,078</td>
<td>-16%</td>
<td>+0%</td>
</tr>
<tr>
<td><strong>Wizz Air</strong></td>
<td>823</td>
<td>+22%</td>
<td>-0%</td>
</tr>
<tr>
<td><strong>KLM</strong></td>
<td>774</td>
<td>-19%</td>
<td>-4%</td>
</tr>
<tr>
<td><strong>British Airways</strong></td>
<td>710</td>
<td>-27%</td>
<td>-1%</td>
</tr>
<tr>
<td><strong>Vueling</strong></td>
<td>703</td>
<td>-3%</td>
<td>-2%</td>
</tr>
<tr>
<td><strong>Scandinavian Airlines</strong></td>
<td>654</td>
<td>-31%</td>
<td>+1%</td>
</tr>
</tbody>
</table>

Within the top 10, **seven airlines** posted decreases or stabilisation over the previous week, highest being:

- **Turkish Airlines** (-54 flights; -4%) mainly owing to domestic flows in Türkiye and flows with UK and Germany.
- **KLM** (-35 flights; -4%) mainly due to decreases on flows with Germany, UK and Switzerland.
- **easyJet** (-26 flights; -2%) mainly due to decreases on flows Greece-Italy, France-UK, Greece-UK and France-Greece.

Also increases for:

- **Lufthansa** (+124 flights; +12%): an “artificial” increase on all flows due to the airline’s strike on 2 Sep.
- **SAS** (+4 flights; +1%) notably owing to flows Spain-Sweden or Italy-Sweden.

**Ryanair** is the busiest Aircraft Operator with 2,989 flights per day on average over last week, followed by **easyJet** (1,632), **Turkish Airlines** (1,463), **Lufthansa** (1,176), **Air France** (1,078), **Wizz Air** (823) and **KLM** (774).

The ranking remains unchanged compared to two weeks ago.
České zpravy - Česká televize

**AIRCRAFT OPERATORS (AVERAGE DAILY FLIGHTS FOR THE LAST WEEK)**

**Top 40**

- **Largest decreases**
  - Turkish Airlines (-4%)
  - KLM Group (-4%)
  - easyJet Group (-2%)
  - Volotea (-9%)
  - Royal Air Maroc (-13%)
  - Vueling (-2%)

- **Highest increases**
  - Lufthansa (+12%) as a bounce back effect of the strike early september.

- Traffic levels ranging from -35% (Norwegian) to +22% (Wizz Air) vs 2019.
AIRCRAFT MANUFACTURERS (SHARE OF FLIGHTS FOR THE LAST WEEK)

At European level, 39% of all flights last week were operated by Airbus aircraft vs 32% by Boeing aircraft.

The situation varies for the top 20 aircraft operators. For these aircraft operators, Airbus share was 51% and Boeing share was 37%.
ORDERS AND DELIVERIES IN EUROPE

The European fleet has stabilised since the disruption due to COVID-19 outbreak and is now back up to 2018/2019 levels.

In 2022, there have been 168 deliveries, with a further +/-140 expected.
**AIRCRAFT OPERATORS** (AVERAGE DAILY FLIGHTS FOR THE LAST WEEK)
Cargo, Legacy, Low Cost and Regional Carriers

**PERFORMANCE OF MAJOR CARGO CARRIERS**
for the week 8 - 14 September 2022

- **DHL**
  - Operated 248 flights/day
  - Compared to the equivalent week in 2019: +31%

- **ASL**
  - Operated 63 flights/day
  - Compared to the equivalent week in 2019: -18%

- **FedEx**
  - Operated 57 flights/day
  - Compared to the equivalent week in 2019: -7%

- **ups**
  - Operated 51 flights/day
  - Compared to the equivalent week in 2019: +12%

**PERFORMANCE OF MAJOR LONG-HAUL/LEGACY CARRIERS**
for the week 8 - 14 September 2022

- **Lufthansa**
  - Operated 1176 flights/day
  - Compared to the equivalent week in 2019: -27%

- **Turkish Airlines**
  - Operated 1463 flights/day
  - Compared to the equivalent week in 2019: +3%

- **AirFrance**
  - Operated 1078 flights/day
  - Compared to the equivalent week in 2019: -16%

- **British Airways**
  - Operated 710 flights/day
  - Compared to the equivalent week in 2019: -27%

- **KLM**
  - Operated 774 flights/day
  - Compared to the equivalent week in 2019: -19%

- **SAS**
  - Operated 854 flights/day
  - Compared to the equivalent week in 2019: -31%

**PERFORMANCE OF MAJOR LOW-COST CARRIERS**
for the week 8 - 14 September 2022

- **Ryanair**
  - Operated 2993 flights/day
  - Compared to the equivalent week in 2019: +15%

- **easyJet**
  - Operated 1632 flights/day
  - Compared to the equivalent week in 2019: -14%

- **Wizz**
  - Operated 523 flights/day
  - Compared to the equivalent week in 2019: +22%

- **vueling**
  - Operated 703 flights/day
  - Compared to the equivalent week in 2019: -3%

- **Pegasus**
  - Operated 484 flights/day
  - Compared to the equivalent week in 2019: -8%

- **Eurowings**
  - Operated 570 flights/day
  - Compared to the equivalent week in 2019: -25%

**PERFORMANCE OF MAJOR REGIONAL CARRIERS**
for the week 8 - 14 September 2022

- **Binter**
  - Operated 148 flights/day
  - Compared to the equivalent week in 2019: +22%

- **Air Noelstrum**
  - Operated 227 flights/day
  - Compared to the equivalent week in 2019: -5%

- **Loganair**
  - Operated 174 flights/day
  - Compared to the equivalent week in 2019: +5%

- **Air Olympic**
  - Operated 85 flights/day
  - Compared to the equivalent week in 2019: -60%
Within the top 10, **seven** States posted flight decreases over the previous week:

- **Türkiye** (-135 flights; -4%) mainly due to Turkish Airlines, Corendon and Pegasus. Notably on domestic flows, flows with Germany, UK and Austria.
- **UK** (-111 flights; -2%) mainly due to easyJet, British Airways and West Atlantic group. Flows with Spain, Greece, France and domestic flows.
- **Greece** (-104 flights; -5%) mainly easyJet, light AOs and Volotea. Mainly flows with Italy, France and domestic flows.

**UK** is the State with the highest number of dep/arr flights on average over last week (5,593) followed by **Germany** (5,041), **Spain** (5,024), **France** (4,344), **Italy** (4,012) and **Türkiye** (3,355).

Ranks for Germany and Spain have been swapped compared to last week (mostly due to Lufthansa strike early September).
STATES (AVERAGE DAILY DEPARTURE/ARRIVAL FLIGHTS FOR THE LAST WEEK)

State FIR daily % arrivals/departures variation vs 2019 on 2022-09-14

7-day average - FIRs at altitude FL200

The designations employed and the presentation of the material on maps, videos and animations do not imply the expression of any opinion whatsoever on the part of EUROCONTROL concerning the legal status of any country.
Largest decreases in flights vs previous week for Türkiye (-4%), United Kingdom (-2%), Greece (-5%), Spain (-1%), Italy (-1%), Romania (-8%) and Croatia (-8%).

Highest increases for Germany (+3%), Denmark (+4%), France (+1%) and Israel (+5%).

Traffic levels ranging from -100% (Ukraine) to +46% (Albania), compared to 2019.
ARRIVAL & DEPARTURE PUNCTUALITY (AT TOP AIRPORTS FOR THE LAST WEEK)

Average arrival / departure punctuality at main airports for the week 8 - 14 Sep 2022

More detailed information on punctuality can be found on our new daily punctuality dashboards: main link, States link and Airports link.
En-route ATFM delays have started to rise since mid-May 2022, reaching 2019 levels on many occasions (see next slide). Recent days are above 2019 levels, especially caused by Weather.

Major contributors over the last 7 days: Germany (34% of all en-route ATFM delays), France (19%), UK (11%), Serbia & Montenegro (9%), Hungary (6%) and Italy (5%).
TOTAL ATFM DELAYS (ALL CAUSES, AIRPORTS AND EN-ROUTE)
2019 and 2022 (7-day average)

Evolution of total ATFM Delays and Flights
The main traffic flow is the intra-Europe flow with 24,267 flights on average for the most recent week, stable over the previous week.

Flows between Europe and Other Europe (incl. Russia) are at -69% compared to 2019.

Important lockdowns (COVID-zero policy) in China over Q2 affected Chinese international and domestic flows. Domestic flows started to recover during Q3 but new lockdowns (eg. Chengdu) hit the traffic recovery for Asia/Pacific (next slide).

Intra-Europe flights are 11% below 2019 levels while intercontinental flows are at -22%.
### Outside Europe (Traffic Situation Over the Last Week vs 2019)

#### Week 8 September-14 September 2022 vs equivalent week in 2019

<table>
<thead>
<tr>
<th>Region</th>
<th>Domestic</th>
<th>International</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Europe</strong> (8 Sep – 14 Sep)</td>
<td>-11%</td>
<td>-22%</td>
</tr>
<tr>
<td><strong>USA</strong> (5 Sep – 11 Sep)</td>
<td>-15%</td>
<td>-10%</td>
</tr>
<tr>
<td><strong>Middle East</strong> (6 Sep – 12 Sep)</td>
<td>-5%</td>
<td>+3%</td>
</tr>
<tr>
<td><strong>China</strong> (6 Sep – 12 Sep)</td>
<td>-57%</td>
<td>-69%</td>
</tr>
</tbody>
</table>
COUNTRY PAIRS (AVERAGE DAILY FLIGHTS FOR THE LAST WEEK)

Top 20

Within the top 10, six flows posted a decrease over the previous week for:

- **Germany-Türkiye** (-32 flights; -7%) mainly due to Corendon, Turkish Airlines and Tailwind.
- **Italy-Italy** (-30 flights; -3%) mainly due to light AOs, Volotea and Blue Air.
- **Spain-UK** (-27 flights, -3%) mainly due to British Airways, easyJet and TUI.

Some increases for:

- **France-France** (+81 flights; +9%) mainly due to light AOs and Air France.
- **Germany-Germany** (+54 flights; +10%) mainly due to a side effect of the Lufthansa strike on 2 September.

Seven of the top 10 flows are domestic.

- **Spain-Spain** is the country-pair with the highest number of dep/arr flights (1,277) followed by **France-France** (1,031), **Italy-Italy** (972), **Spain-UK** (885), **Norway-Norway** (868), **UK-UK** (834), and **Türkiye-Türkiye** (819).
- **France-France** increased their ranking while **Italy-Italy** decreased.
COUNTRY PAIRS (AVERAGE DAILY FLIGHTS FOR THE LAST WEEK)

### Largest decreases in flights vs previous week
- Greece-Italy (-19%)
- Germany-Türkiye (-7%)
- Italy-Italy (-3%)
- Spain-UK (-3%)
- Spain-Spain (-2%)
- Greece-UK (-6%)
- Türkiye-Türkiye (-2%)

### Highest increases in flights vs previous week
- France-France (+9%)
- Germany-Germany (+10%)
- France-Germany (+6%)
- Austria-Germany (8%)
AIRPORTS (AVERAGE DAILY DEPARTURE/ARRIVAL FLIGHTS FOR THE LAST WEEK)

Top 10

Within the top 10, six airports posted decreases or stabilization over the previous week, highest being:

✈ Amsterdam (-36 flights; -3%) mainly due to KLM Group. Flows with France, Türkiye and Germany.
✈ IGA Istanbul (-29 flights; -2%) mainly due to Turkish Airlines. Main decreases on domestic flows.
✈ Paris CDG (-27 flights; -2%) mainly due to Air France and Nouvel Air Tunisie. Flows with Tunisia, Switzerland, US and Morocco.

Increases for:
✈ Frankfurt (+81 flights; +7%) due to the counter effect of the Lufthansa strike on 2 September.

➤ IGA Istanbul is the airport with the highest number of dep/arr flights (1,334) followed by Amsterdam (1,304), Paris CDG (1,246), Frankfurt (1,159) and London Heathrow (1,110).

➤ IGA Istanbul is the busiest airport in Europe, recording more flights than in 2019 over the same week (+6%). Palma de Mallorca also managed to exceed 2019 levels too (+1%).
Largest decreases in flights vs the previous week for Antalya (-5%), London Gatwick (-5%), Amsterdam (-3%), Ibiza (-9%), IGA Istanbul (-2%) and Paris CDG (-2%).

Highest increases for Frankfurt (+7%), Munich (+6%) and Milan Linate (+8%).

Traffic levels ranging from -36% (Milan) to +2% (IGA Istanbul) compared to 2019.
TOP 40 GLOBAL AIRPORTS (AVERAGE DAILY DEPARTURE FLIGHTS FOR THE LAST WEEK)

Comparing week ending 29 August (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 (8th) and Paris CDG (10th).

✈️ Frankfurt and London Heathrow are in the Top 15.

✈️ Ten of the Top 15 global airports are currently based in the US.

✈️ The first Asian airport in 2022 is New Delhi (12th).
EUROCONTROL has billed 805M€ of en-route charges for August flights. This is 1% higher compared to the amount billed for the August 2019 flights. On a year-to-date basis, EUROCONTROL billed 4,997M€ which is -6% vs 2019.
Compared to 2019, air ticket prices started to increase since May 2022. July 2022 recorded circa 15% increase on July 2019.

Air ticket prices here are deflated (we removed the effects of inflation).

Jet fuel prices dropped to 339 cts/gallon on 9 September (-11% over two weeks, +45% since early January).
ECONOMIC FORECAST (2022-2023)

- **GDP baseline forecast** from Oxford Economics was revised downwards in the August 2022 release (vs May 2022).
- Main reasons: rising inflation, dwindling growth, growing geopolitical tensions, natural disruptions to business.
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