15 September 2022

Supporting European Aviation

EUROCONTROL

EUROCONTROL **COMPREHENSIVE ASSESSMENT**

European Aviation

sesar DEPLOYMENT MANAGER

FOUNDING MEMBER OF sesar JOINT UNDERTAKING

NETWORK MANAGER

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 Aircraft Operators

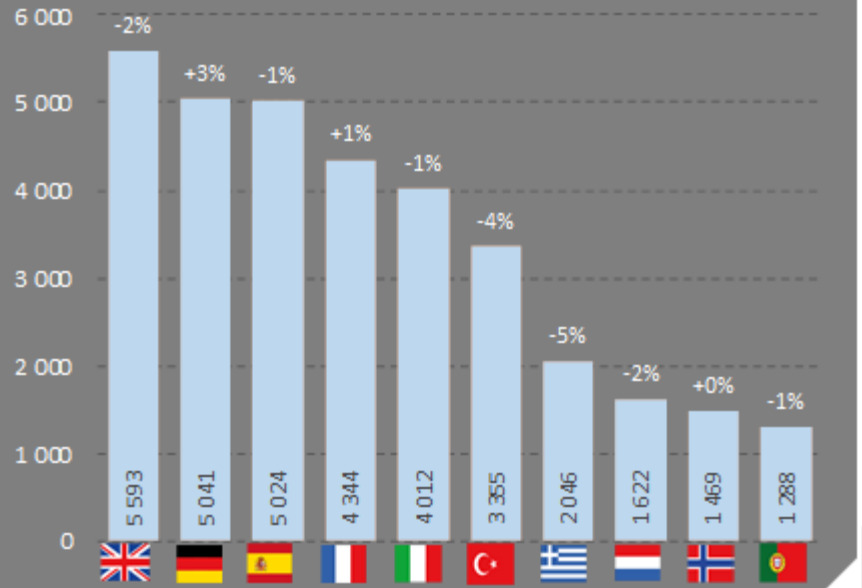
on Week 08 - 14 Sep 2022 (avg daily flights)

1.	Ryanair Group	Operated 2 989 flights	↑15% vs same week in 2019 / ↓0% vs prev week
2.	easyJet Group	Operated 1 632 flights	↓14% vs same week in 2019 / ↓2% vs prev week
3.	Turkish Airlines	Operated 1 463 flights	↑3% vs same week in 2019 / ↓4% vs prev week
4.	Lufthansa Airlines	Operated 1 176 flights	↓27% vs same week in 2019 / ↑12% vs prev week
5.	Air France Group	Operated 1 078 flights	↓16% vs same week in 2019 / ↑0% vs prev week
6.	Wizz Air Group	Operated 823 flights	↑22% vs same week in 2019 / ↓0% vs prev week
7.	KLM Group	Operated 774 flights	↓19% vs same week in 2019 / ↓4% vs prev week
8.	British Airways Grp	Operated 710 flights	↓27% vs same week in 2019 / ↓1% vs prev week
9.	Vueling	Operated 703 flights	↓3% vs same week in 2019 / ↓2% vs prev week
10.	SAS Group	Operated 654 flights	↓31% vs same week in 2019 / ↑1% vs prev week

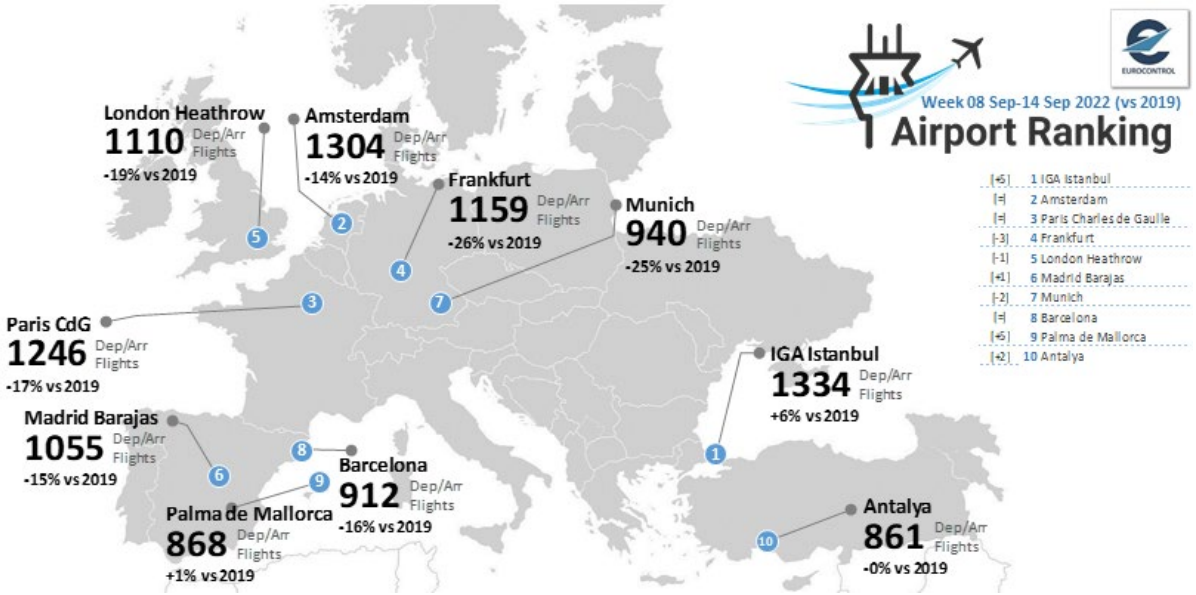
Top 10 Busiest States

on week 08 - 14 Sep 2022 (avg daily flights)

(Dep/Arr flights and comparison with previous week)



TOP 10 AIRPORTS, FLOWS, MARKET SEGMENTS, ROUTE CHARGES & FUEL PRICES



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

Traffic Flow

Average daily flights on week of 08 - 14 Sep 2022

	Flights	vs previous week	vs 2019
Intra-European	24 267	-0%	-11%
Intercontinental	5 305	-2%	-22%

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

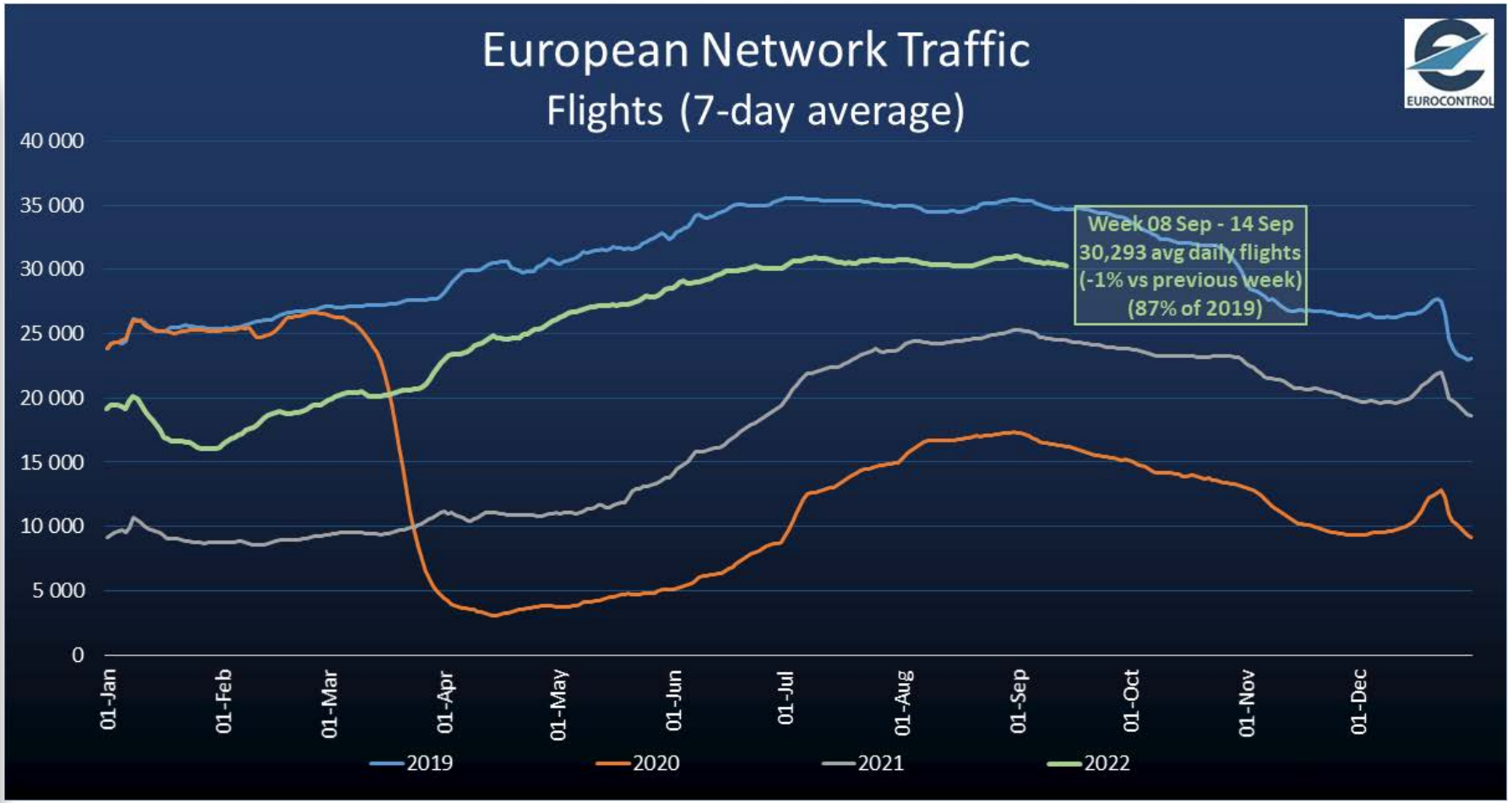
379 cents/gallon on 26 August 2022

Source: IATA/Platts

OVERALL TRAFFIC SITUATION AT NETWORK LEVEL

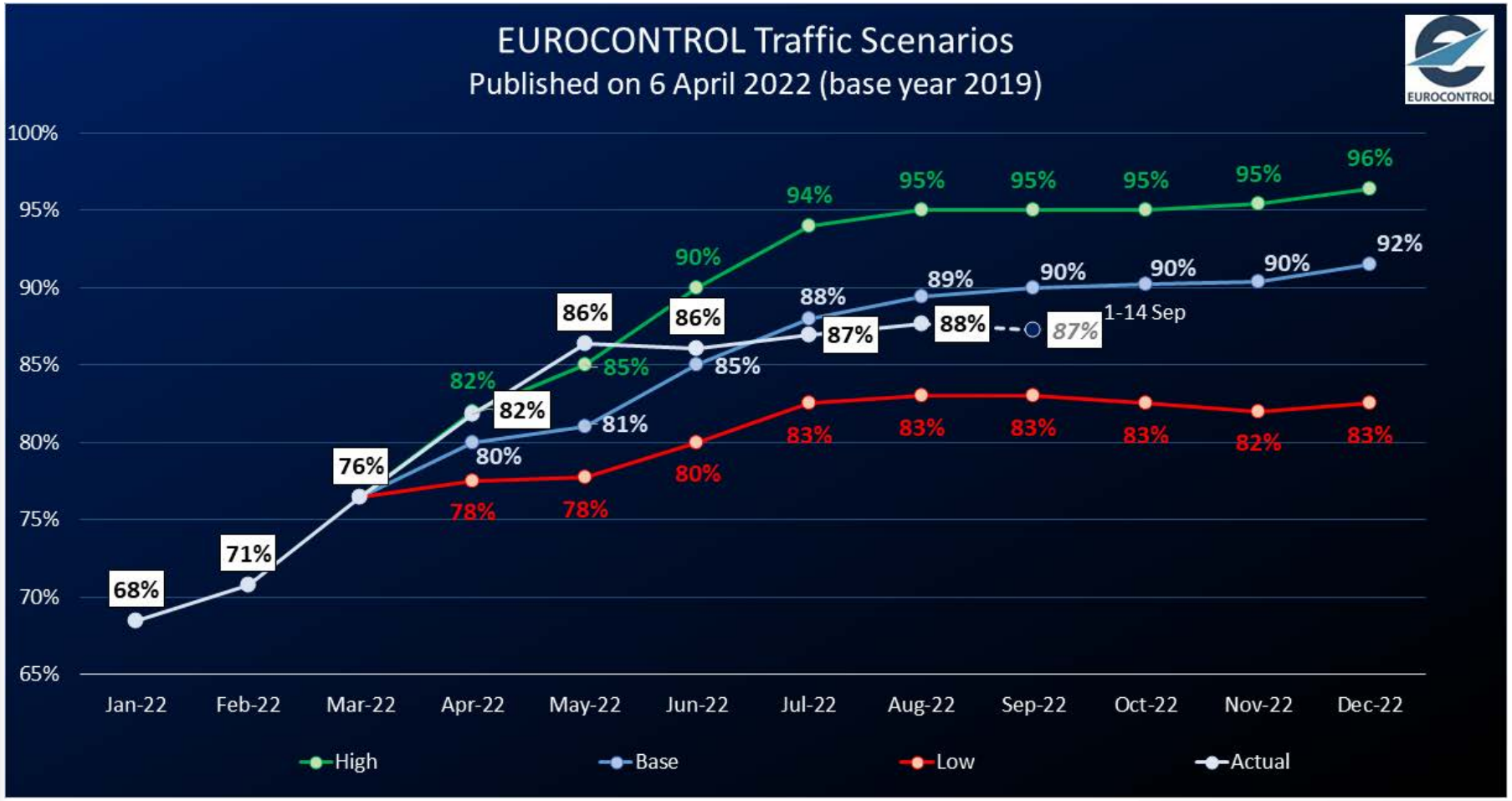
On week 8 Sep – 14 Sep:

- **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.

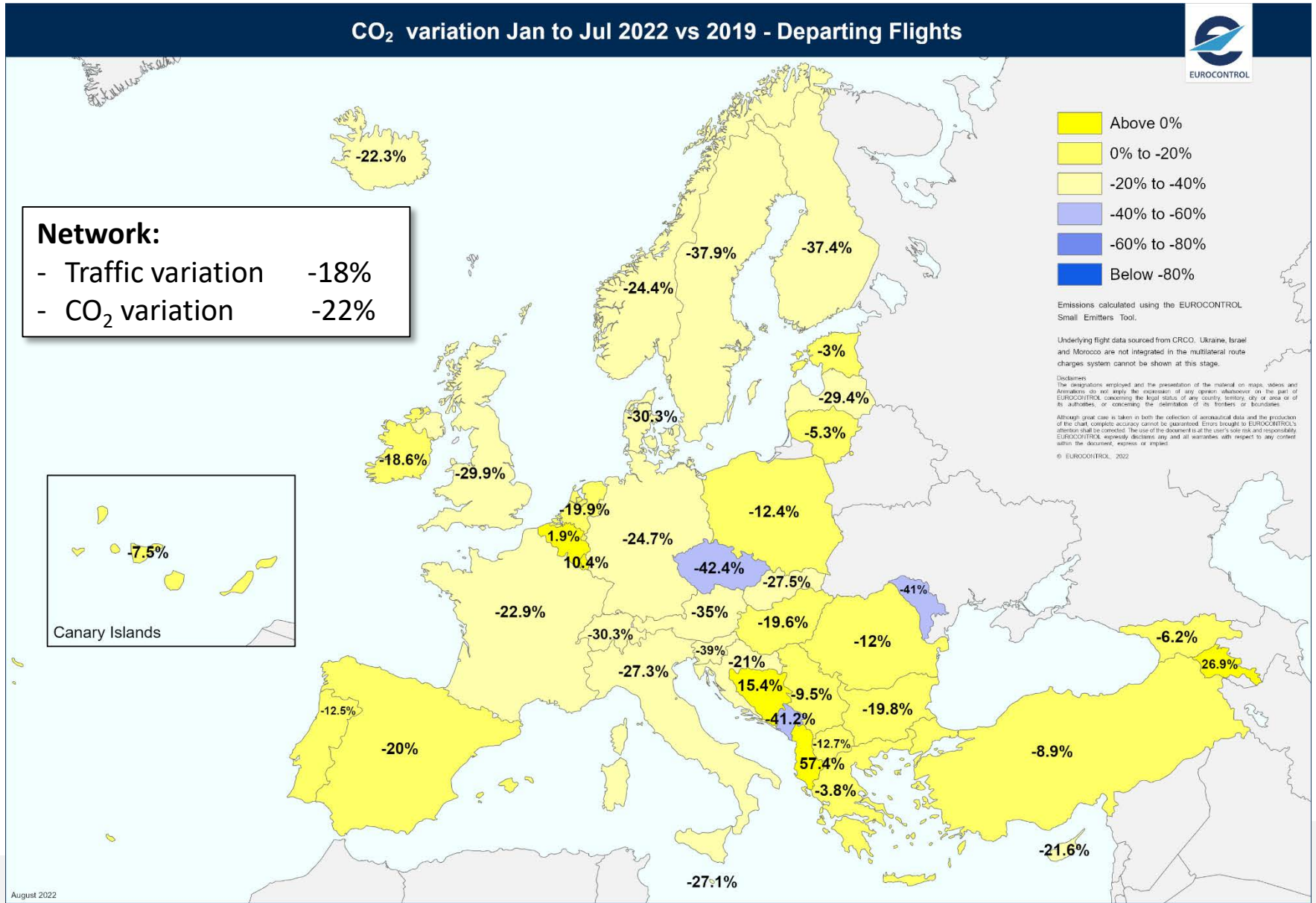


CURRENT SITUATION COMPARED TO THE LATEST EUROCONTROL TRAFFIC SCENARIOS

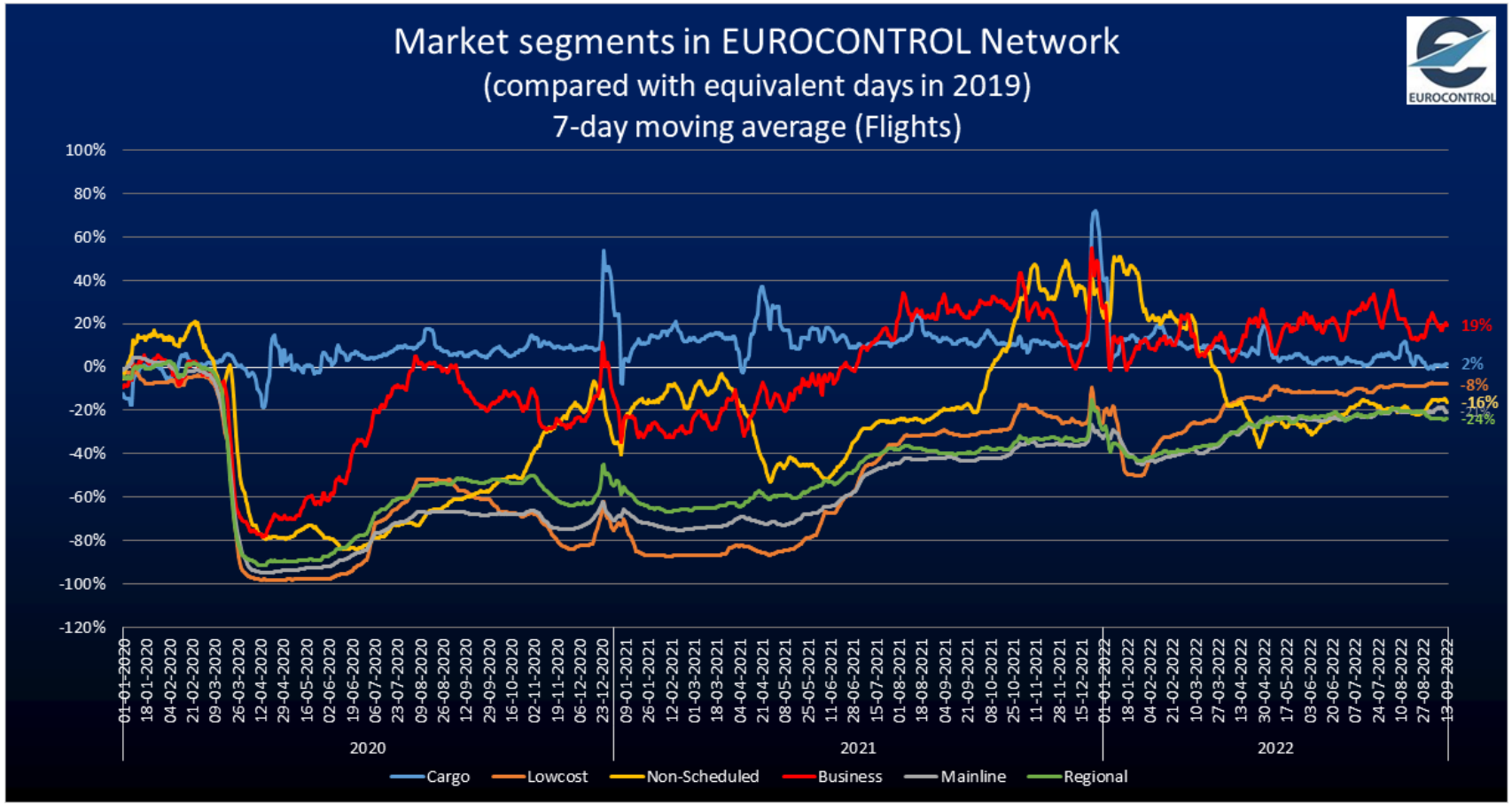
- The last EUROCONTROL Traffic scenarios have been published on 6 April 2022.
- Since **the beginning of September**, network traffic (flights) is at **87% of 2019** levels, below the base scenario.
- On a year to date basis, network traffic in 2022 stands at **82**% of 2019.



AVIATION SUSTAINABILITY



MARKET SEGMENTS



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)

Top 10 Aircraft Operators	Week (08 - 14 Sep 2022)		
	Average flights per day	% vs 2019	% over previous week
RYANAIR	2 989	+15%	-0%
easyJet	1 632	-14%	-2%
TURKISH AIRLINES	1 463	+3%	-4%
Lufthansa	1 176	-27%	+12%
AIRFRANCE	1 078	-16%	+0%
Wizz	823	+22%	-0%
KLM	774	-19%	-4%
BRITISH AIRWAYS	710	-27%	-1%
vueling	703	-3%	-2%
Scandinavian Airlines	654	-31%	+1%

- **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.

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

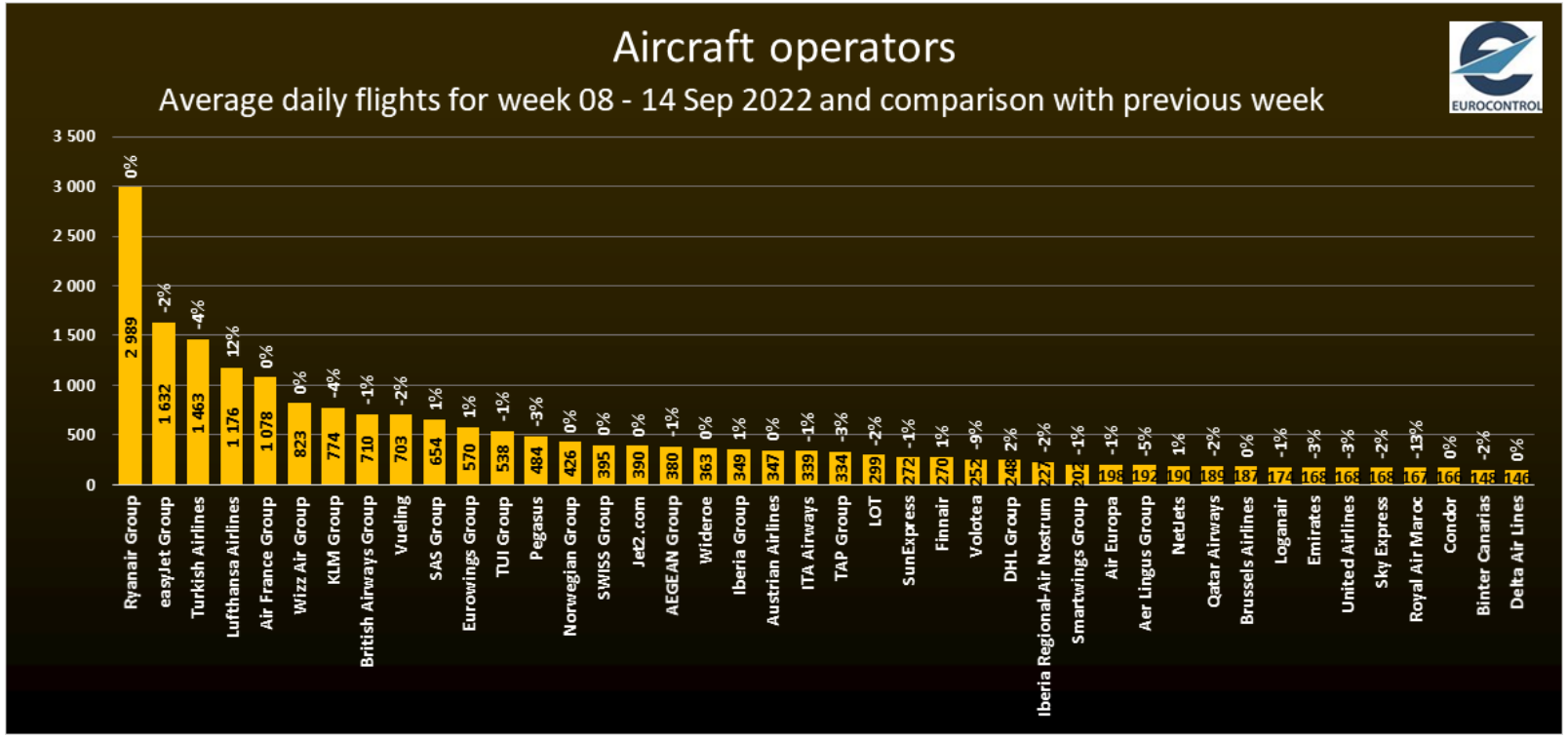
- **Turkish Airlines** (-54 flights; -4%) mainly owing to domestic flows in Türkiye and flows with UK and Germany.
- **KLM** (-35 flights; -4%) mainly due to decreases on flows with Germany, UK and Switzerland.
- **easyJet** (-26 flights; -2%) mainly due to decreases on flows Greece-Italy, France-UK,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

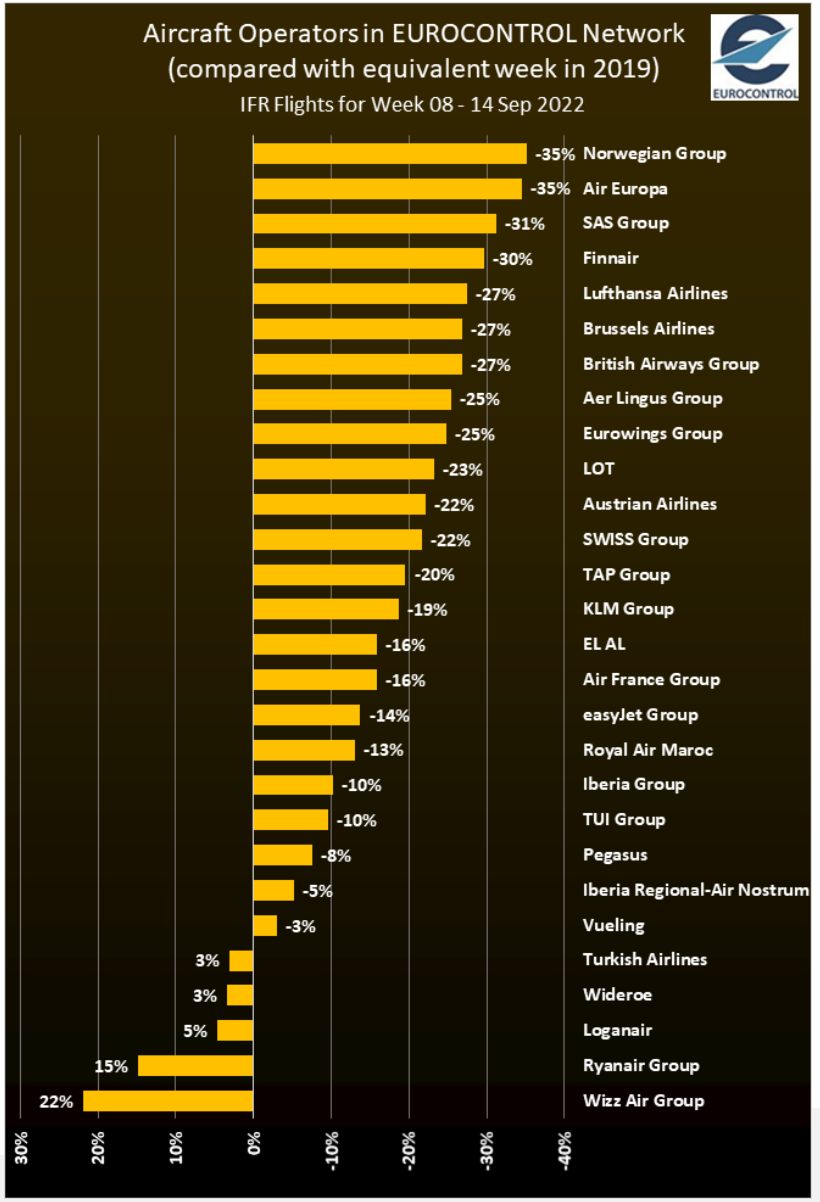
Also **increases** for:

- **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.

AIRCRAFT OPERATORS (AVERAGE DAILY FLIGHTS FOR THE LAST WEEK)

Top 40

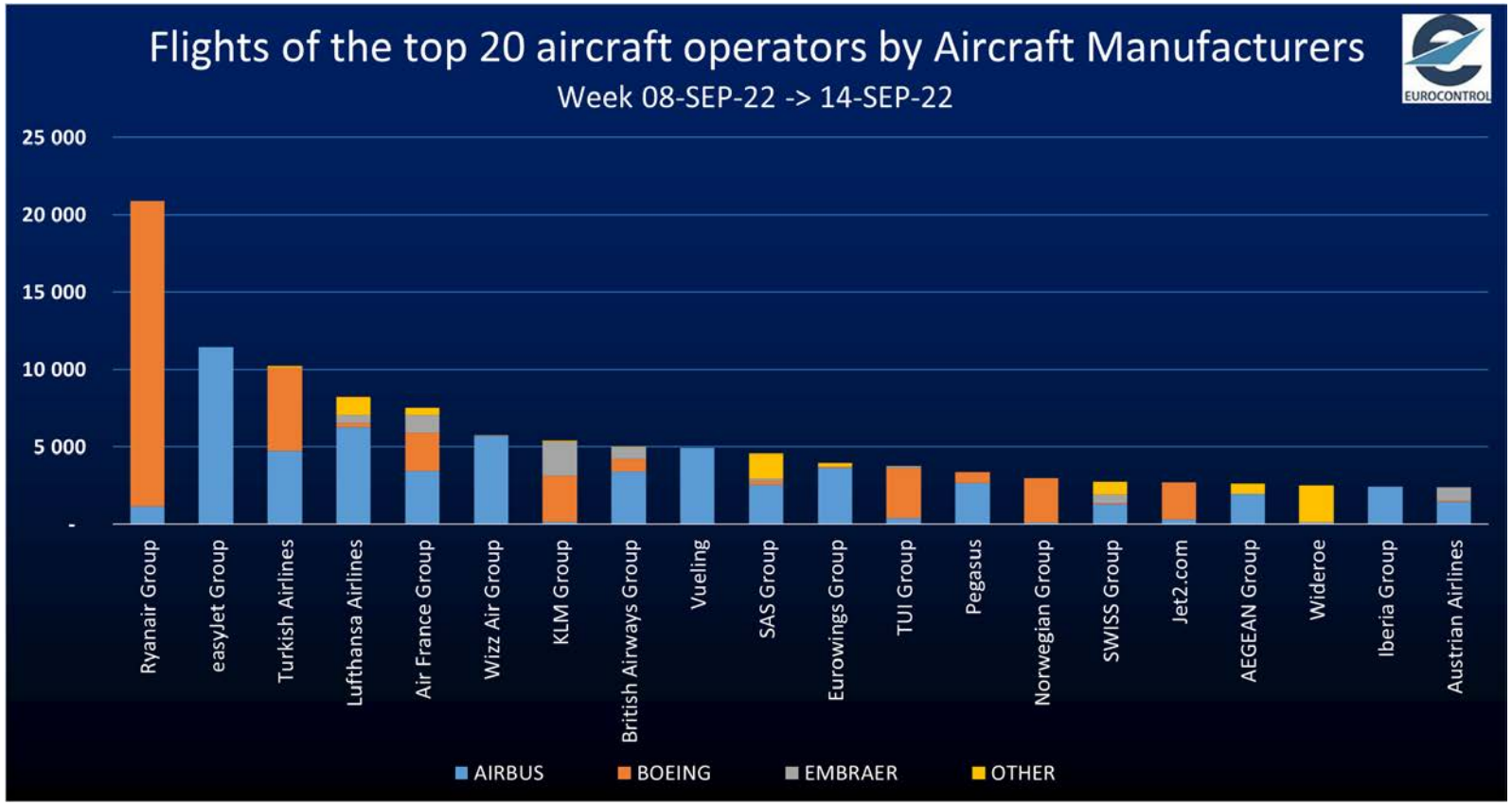


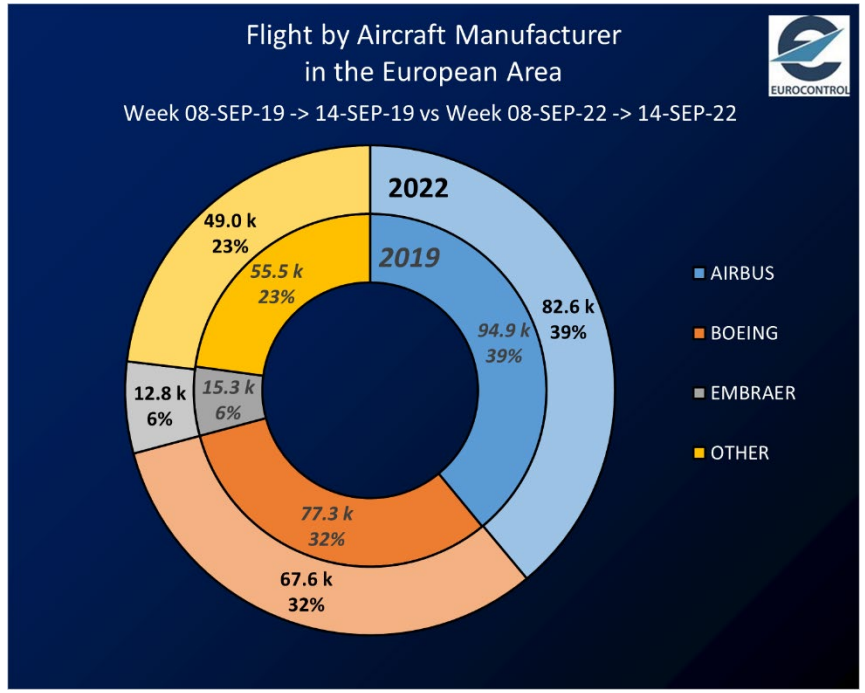


- Largest decreases in flights vs previous week for **Turkish Airlines** (-4%), **KLM Group** (-4%), **easyJet Group** (-2%), **Volotea** (-9%), **Royal Air Maroc** (-13%) and **Vueling** (-2%).
- Highest increases for **Lufthansa** (+12%) as a bounce back effect of the strike early september.
- Traffic levels ranging from -35% (**Norwegian**) to +22% (**Wizz Air**) vs 2019.

AIRCRAFT MANUFACTURERS (SHARE OF FLIGHTS FOR THE LAST WEEK)

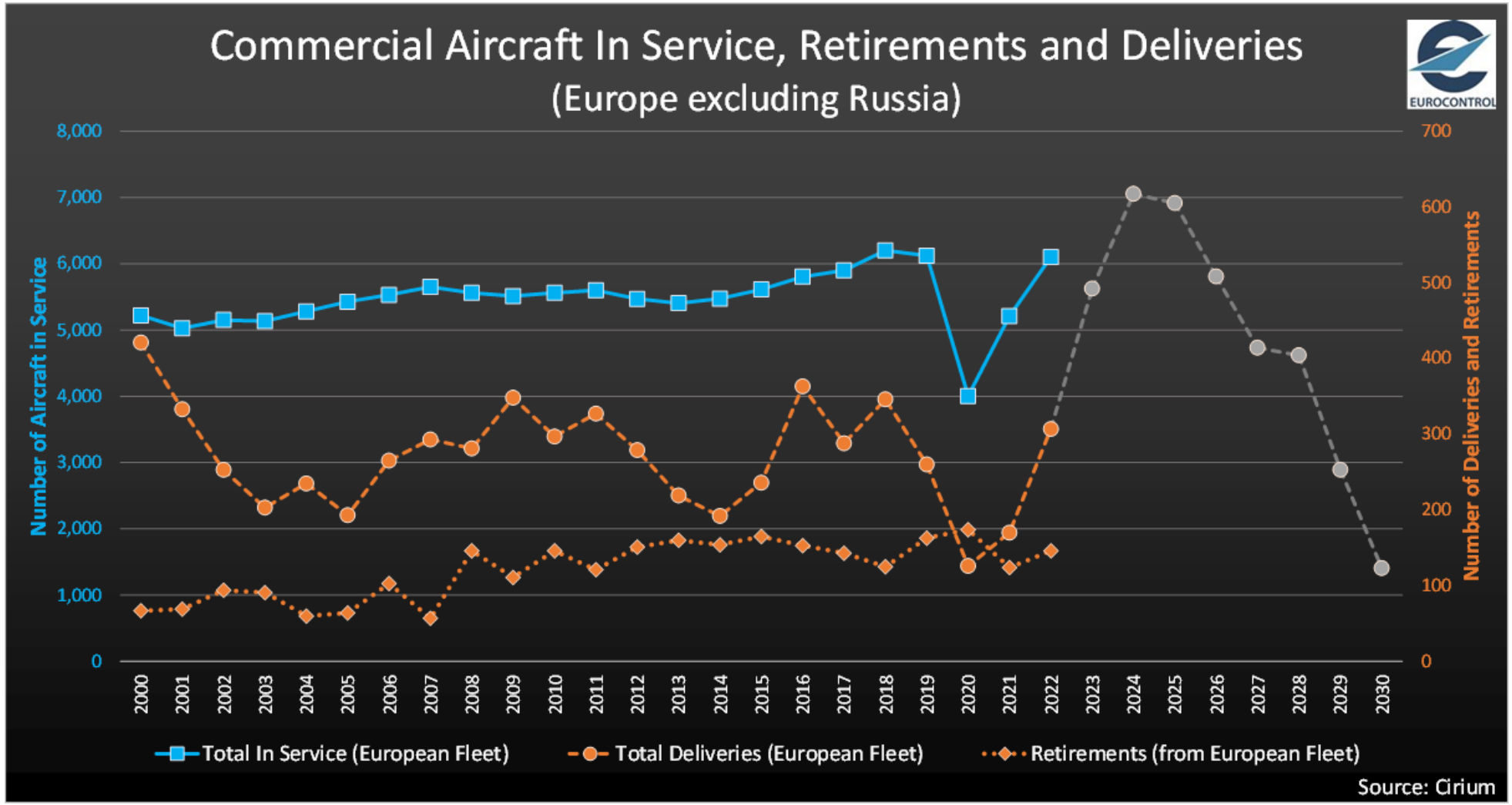
Flights of the top 20 Aircraft operators for the last week





- 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, +31% compared to the equivalent week in 2019

ASL AIRLINES BELGIUM: OPERATED 63 flights/day, -18% compared to the equivalent week in 2019

FedEx: OPERATED 57 flights/day, -7% compared to the equivalent week in 2019

UPS: OPERATED 51 flights/day, +12% compared to the equivalent week in 2019

PERFORMANCE OF MAJOR LONG-HAUL/LEGACY CARRIERS

for the week 8 - 14 September 2022

Lufthansa: OPERATED 1176 flights/day, -27% compared to the equivalent week in 2019

TURKISH AIRLINES: OPERATED 1463 flights/day, +3% compared to the equivalent week in 2019

AIRFRANCE: OPERATED 1078 flights/day, -16% compared to the equivalent week in 2019

BRITISH AIRWAYS: OPERATED 710 flights/day, -27% compared to the equivalent week in 2019

KLM: OPERATED 774 flights/day, -19% compared to the equivalent week in 2019

SAS: OPERATED 654 flights/day, -31% compared to the equivalent week in 2019

PERFORMANCE OF MAJOR LOW-COST CARRIERS

for the week 8 - 14 September 2022

RYANAIR: OPERATED 2989 flights/day, +15% compared to the equivalent week in 2019

easyJet: OPERATED 1632 flights/day, -14% compared to the equivalent week in 2019

WIZZ: OPERATED 823 flights/day, +22% compared to the equivalent week in 2019

vueling: OPERATED 703 flights/day, -3% compared to the equivalent week in 2019

PEGASUS: OPERATED 484 flights/day, -8% compared to the equivalent week in 2019

Eurowings: OPERATED 570 flights/day, -25% compared to the equivalent week in 2019

PERFORMANCE OF MAJOR REGIONAL CARRIERS*

for the week 8 - 14 September 2022

widerøe: OPERATED 363 flights/day, +3% compared to the equivalent week in 2019

AIR NOSTRUM: OPERATED 227 flights/day, -5% compared to the equivalent week in 2019

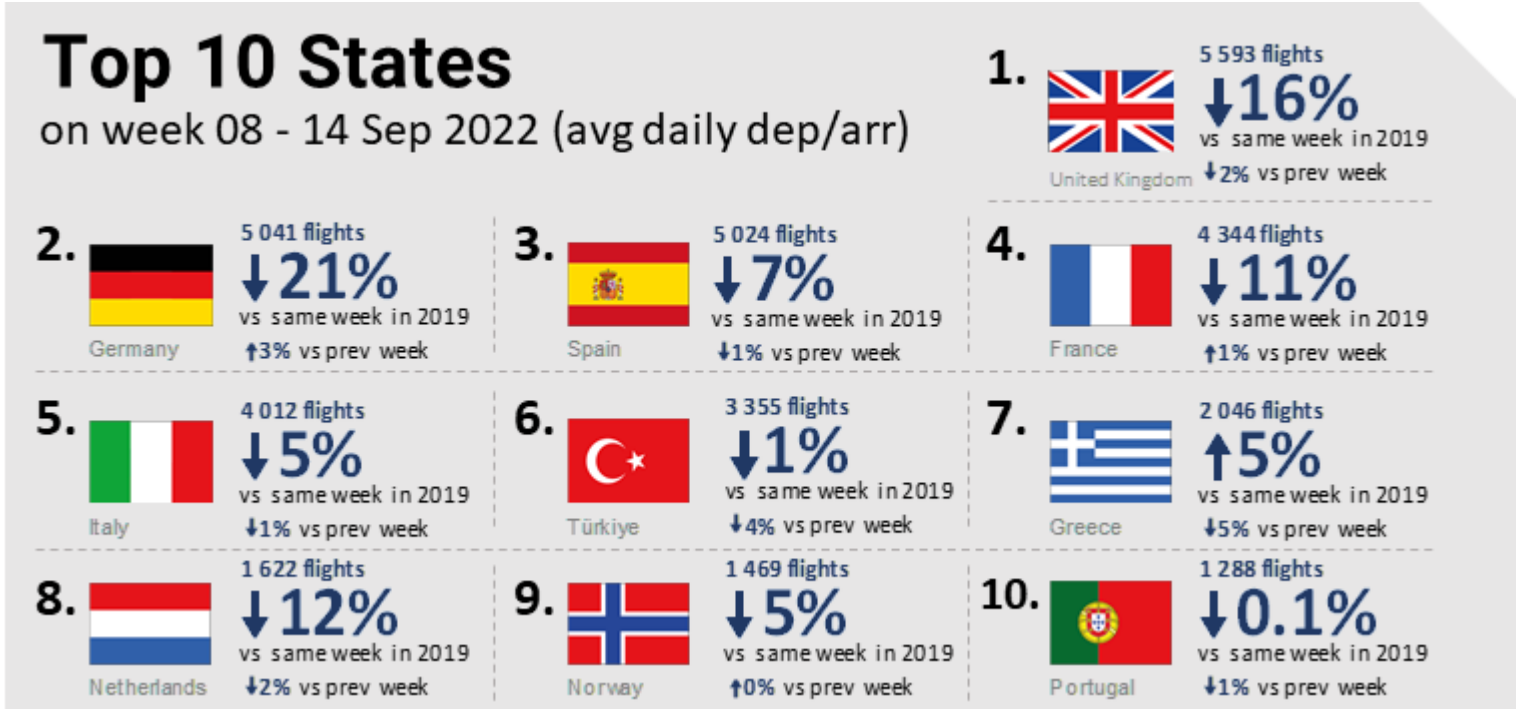
Loganair Scotland's Airline: OPERATED 174 flights/day, +5% compared to the equivalent week in 2019

Binter: OPERATED 148 flights/day, +22% compared to the equivalent week in 2019

OLYMPIC AIR: OPERATED 86 flights/day, -60% compared to the equivalent week in 2019

*REGIONAL AIRLINES USING SEPARATE IATA CODES

STATES (AVERAGE DAILY DEPARTURE/ARRIVAL FLIGHTS FOR THE LAST WEEK)



- **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).

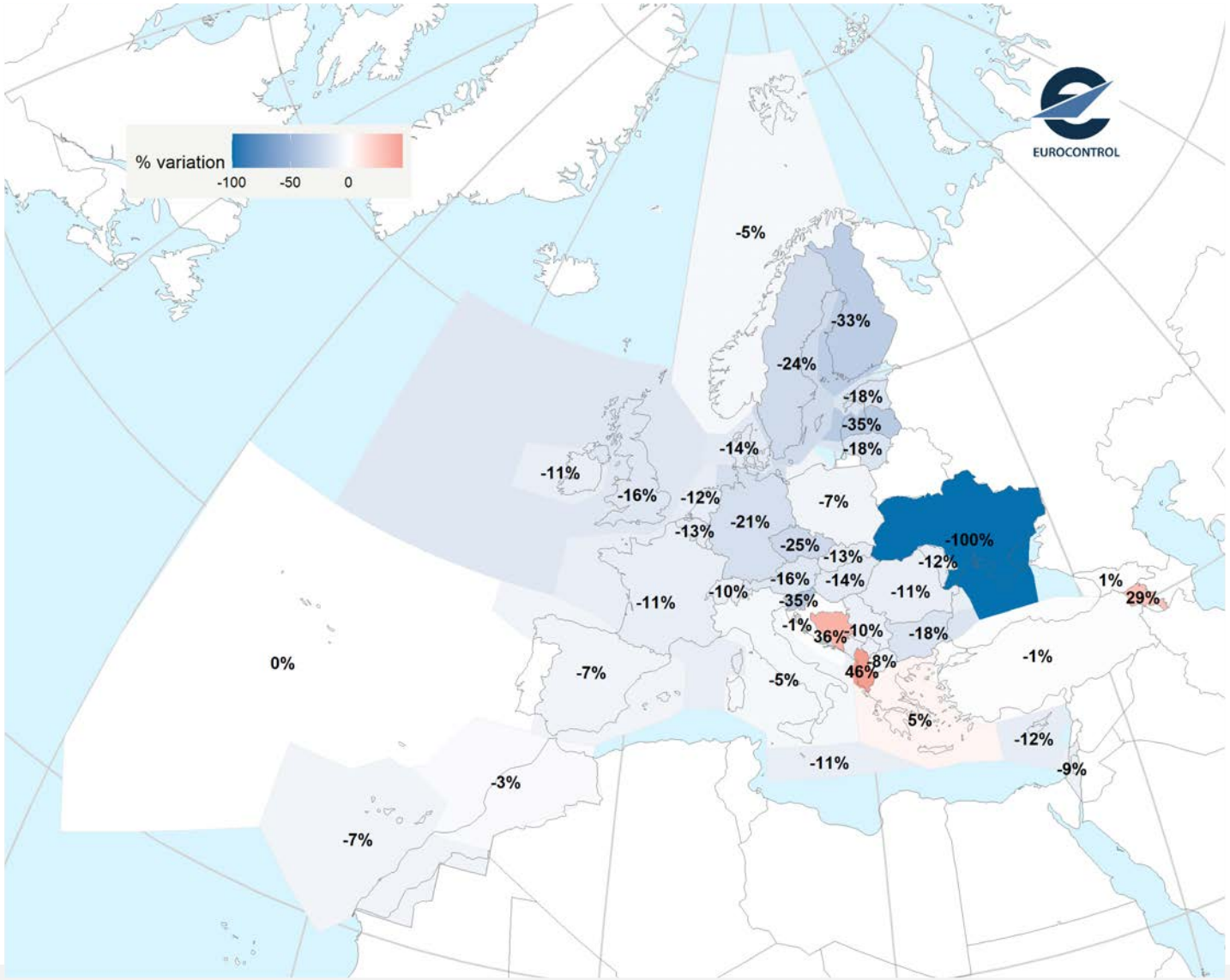
Within the top 10, **seven** States posted flight decreases over the previous week:

- **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 UK.
- **Spain** (-61 flights; -1%) mainly due to Vueling, light AOs and Blue Air. Decreases on domestic flows as well as flows with UK, Romania and Italy.

STATES (AVERAGE DAILY DEPARTURE/ARRIVAL FLIGHTS FOR THE LAST WEEK)

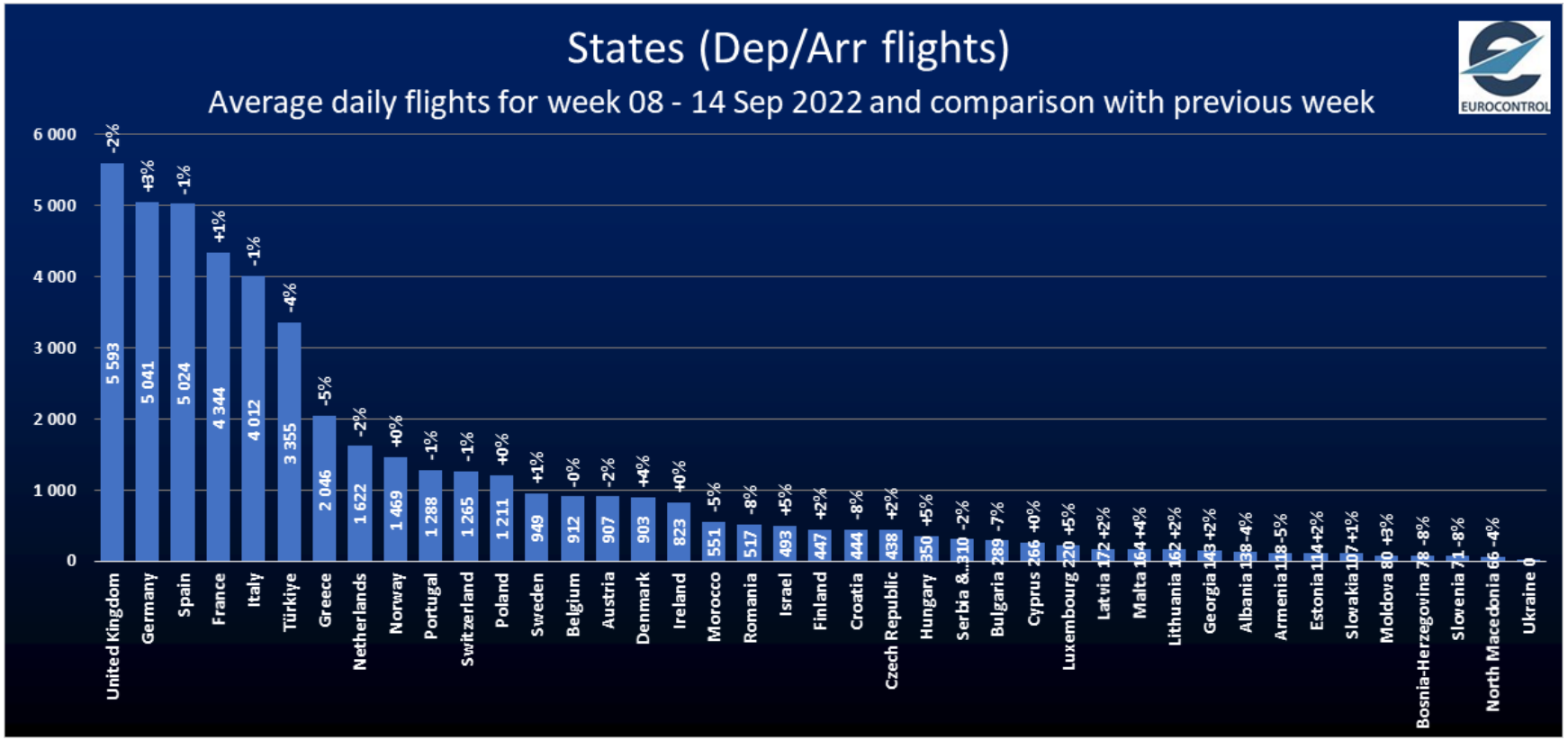
State FIR daily % arrivals/departures variation vs 2019 on 2022-09-14

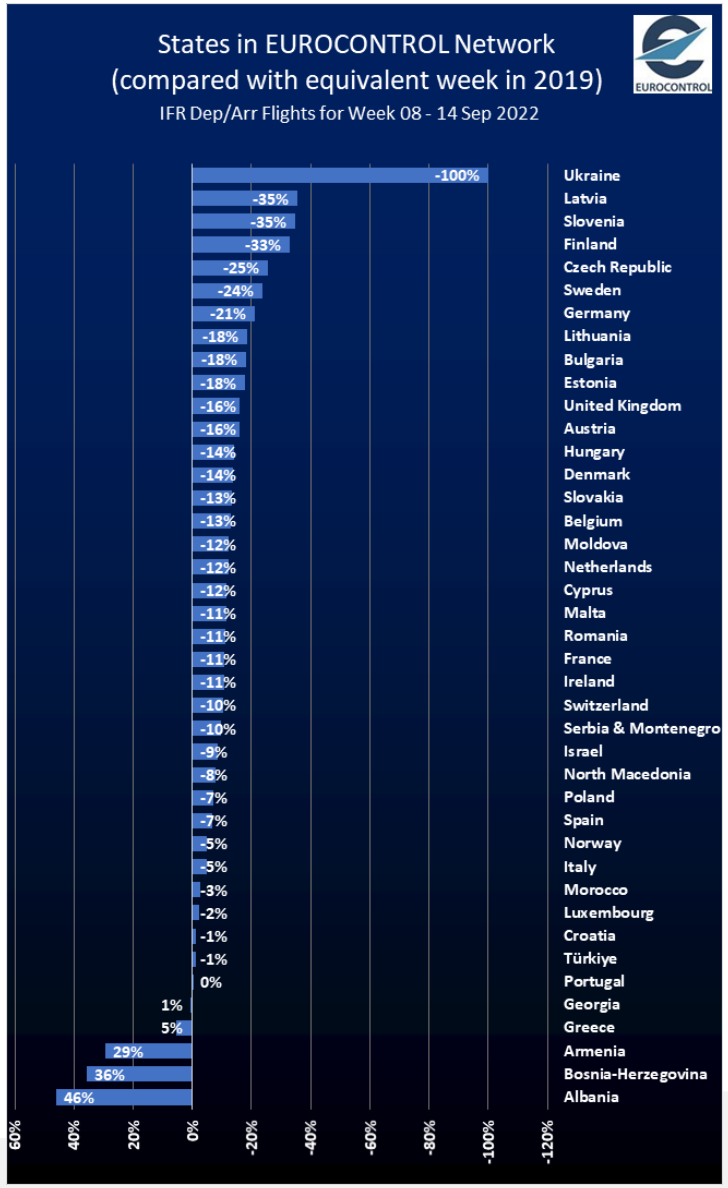
7-day average - FIRs at altitude FL200



STATES (AVERAGE DAILY DEPARTURE/ARRIVAL FLIGHTS FOR THE LAST WEEK)

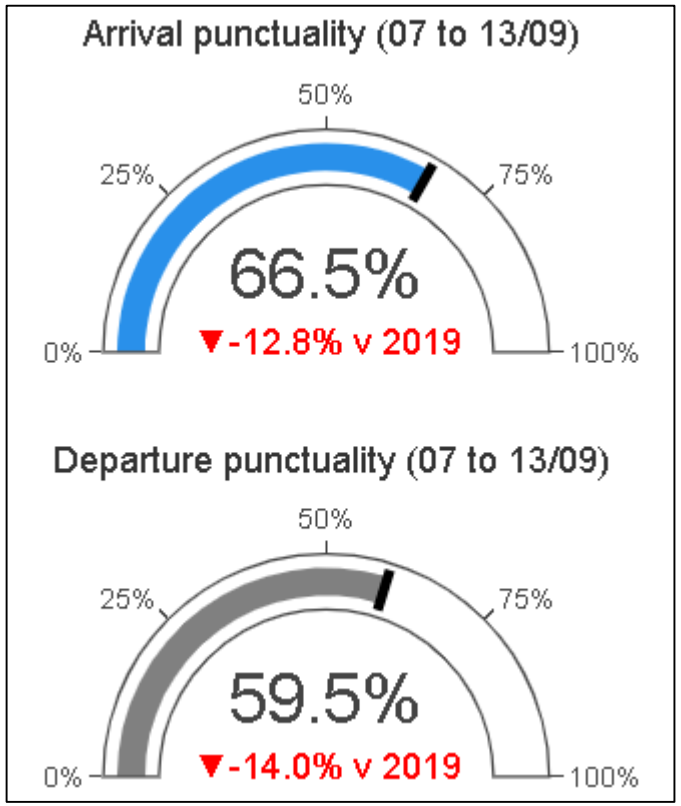
Top 40

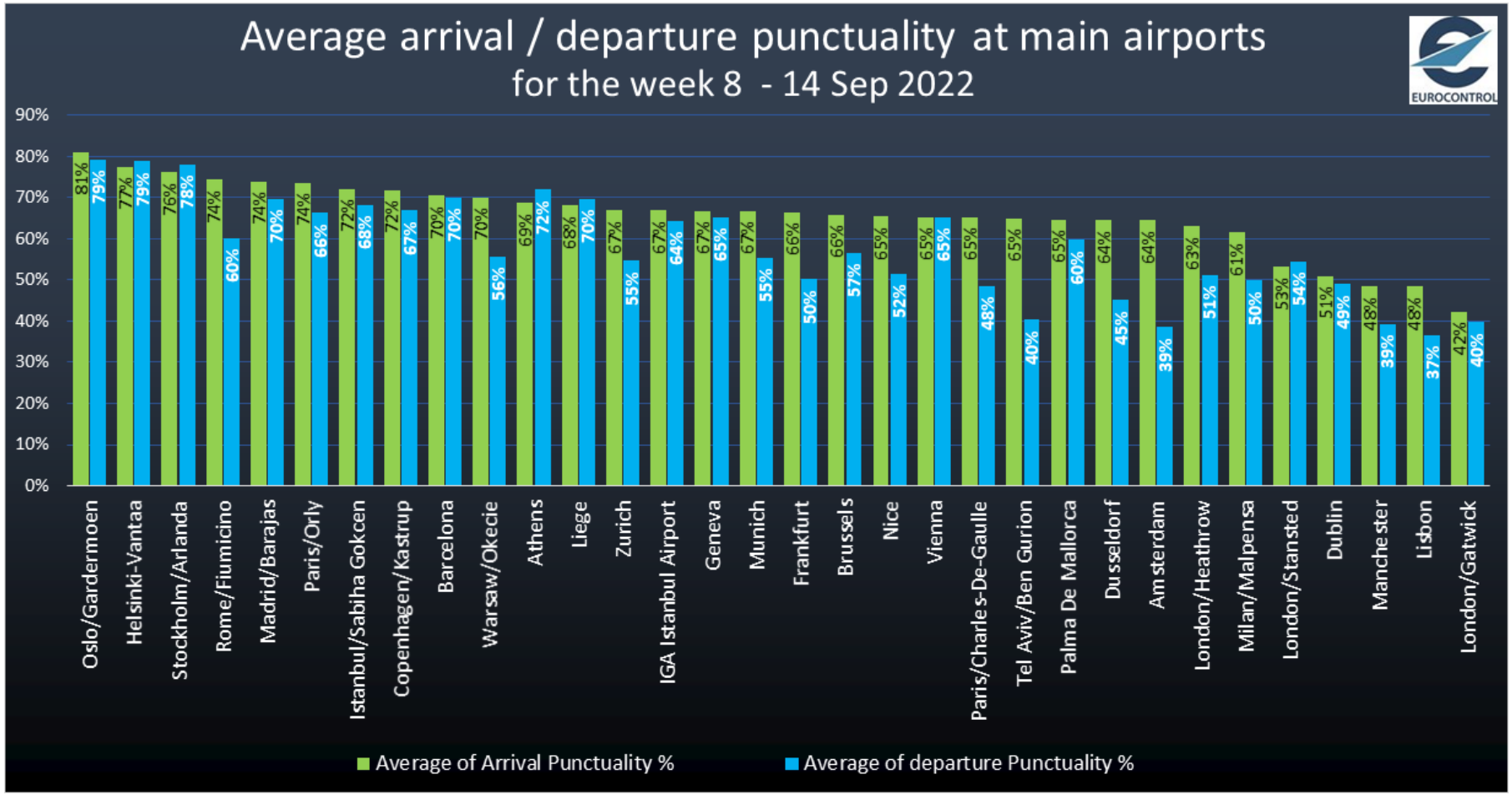




- Largest decreases in flights vs previous week for **Türkiye** (-4%), **United Kingdom** (-2%), **Greece** (-5%), **Spain** (-1%), **Italy** (-1%), **Romania** (-8%) and **Croatia** (-8%).
- Highest increases for **Germany** (+3%), **Denmark** (+4%), **France** (+1%) and **Israel** (+5%).
- Traffic levels ranging from -100% (**Ukraine**) to +46% (**Albania**), compared to 2019.

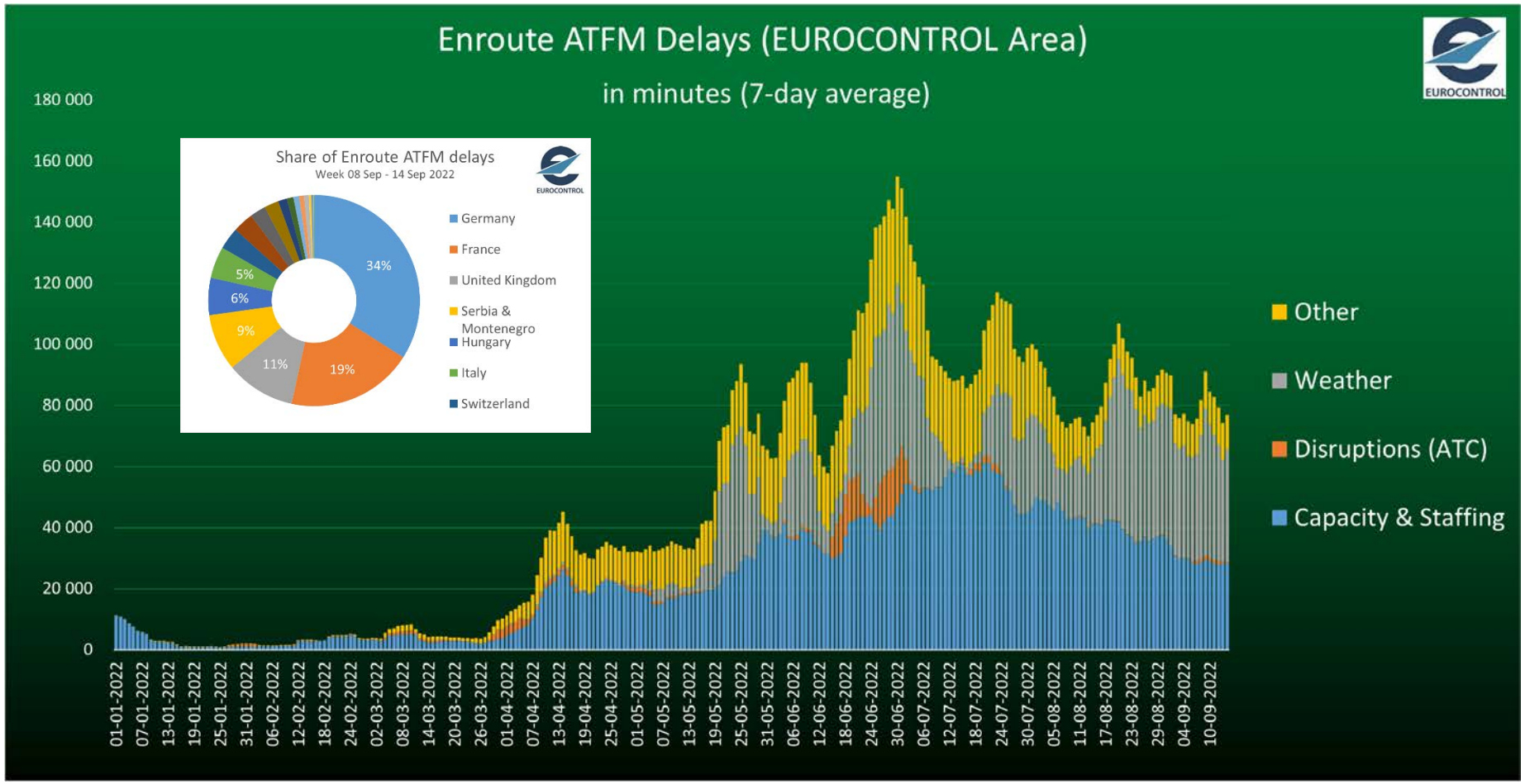
ARRIVAL & DEPARTURE PUNCTUALITY (AT TOP AIRPORTS FOR THE LAST WEEK)





✈ 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

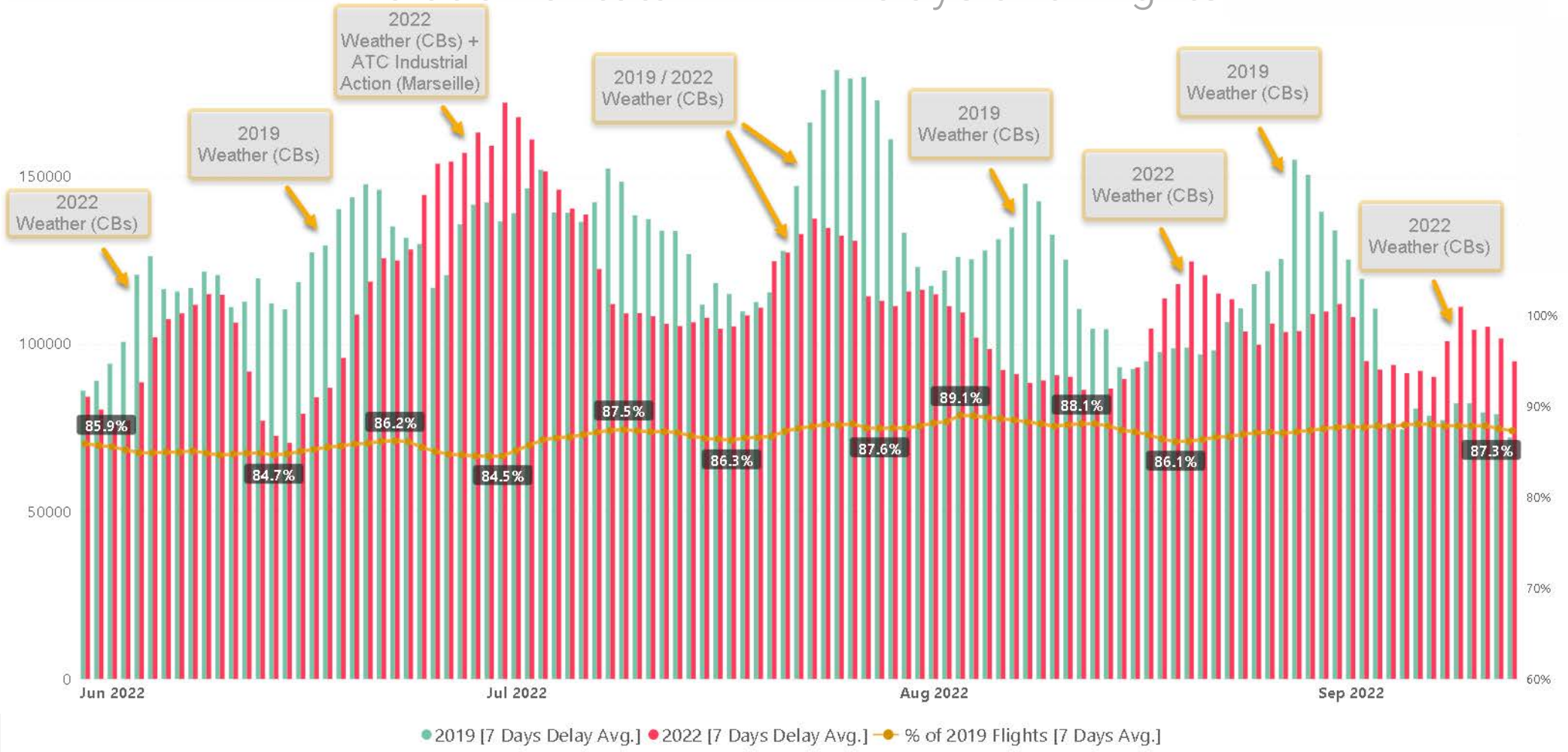


- En-route ATFM delays have started to rise since mid-May 2022, reaching 2019 levels on many occasions (see next slide). Recent days are above 2019 levels, especially caused by Weather.
- Major contributors over the last 7 days: **Germany** (34% of all en-route ATFM delays), **France** (19%), **UK** (11%), **Serbia & Montenegro** (9%), **Hungary** (6%) and **Italy** (5%).

TOTAL ATFM DELAYS (ALL CAUSES, AIRPORTS AND EN-ROUTE)

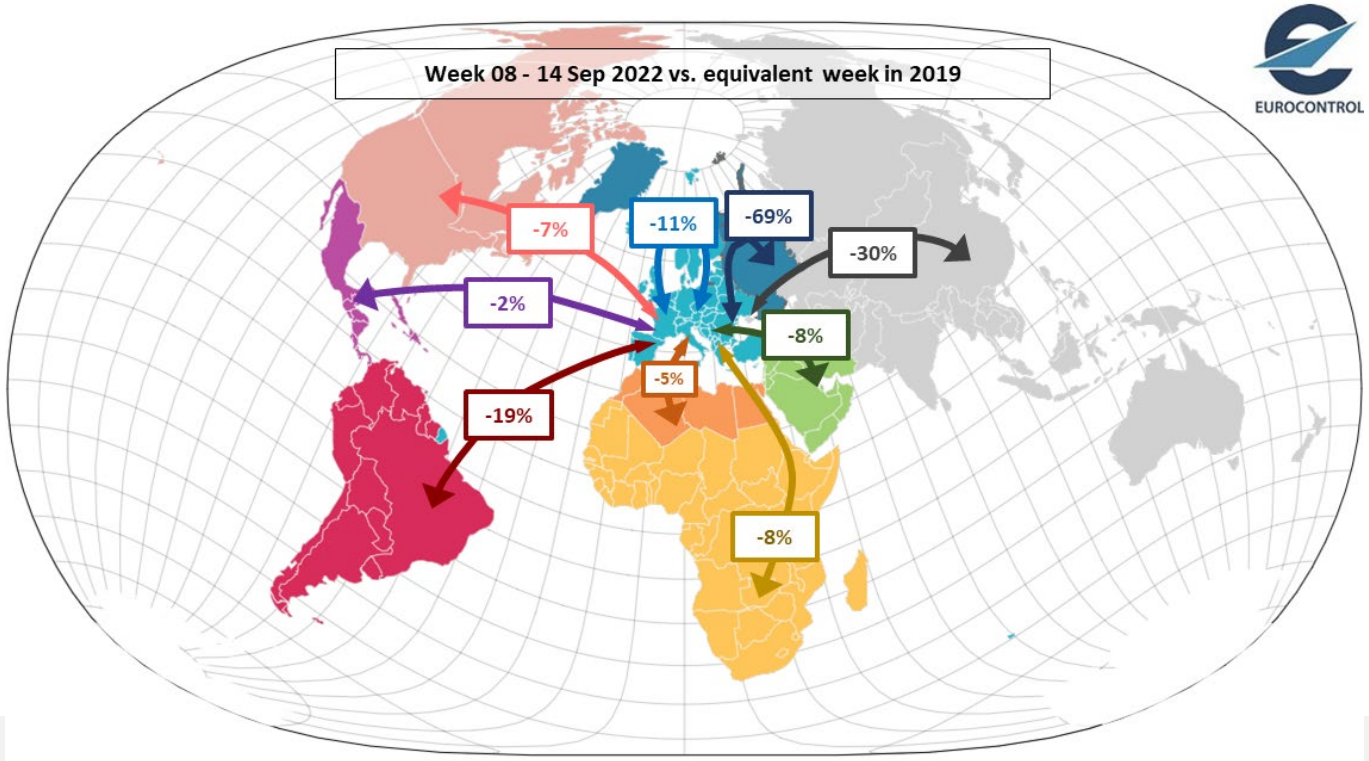
2019 and 2022 (7-day average)

Evolution of total ATFM Delays and Flights



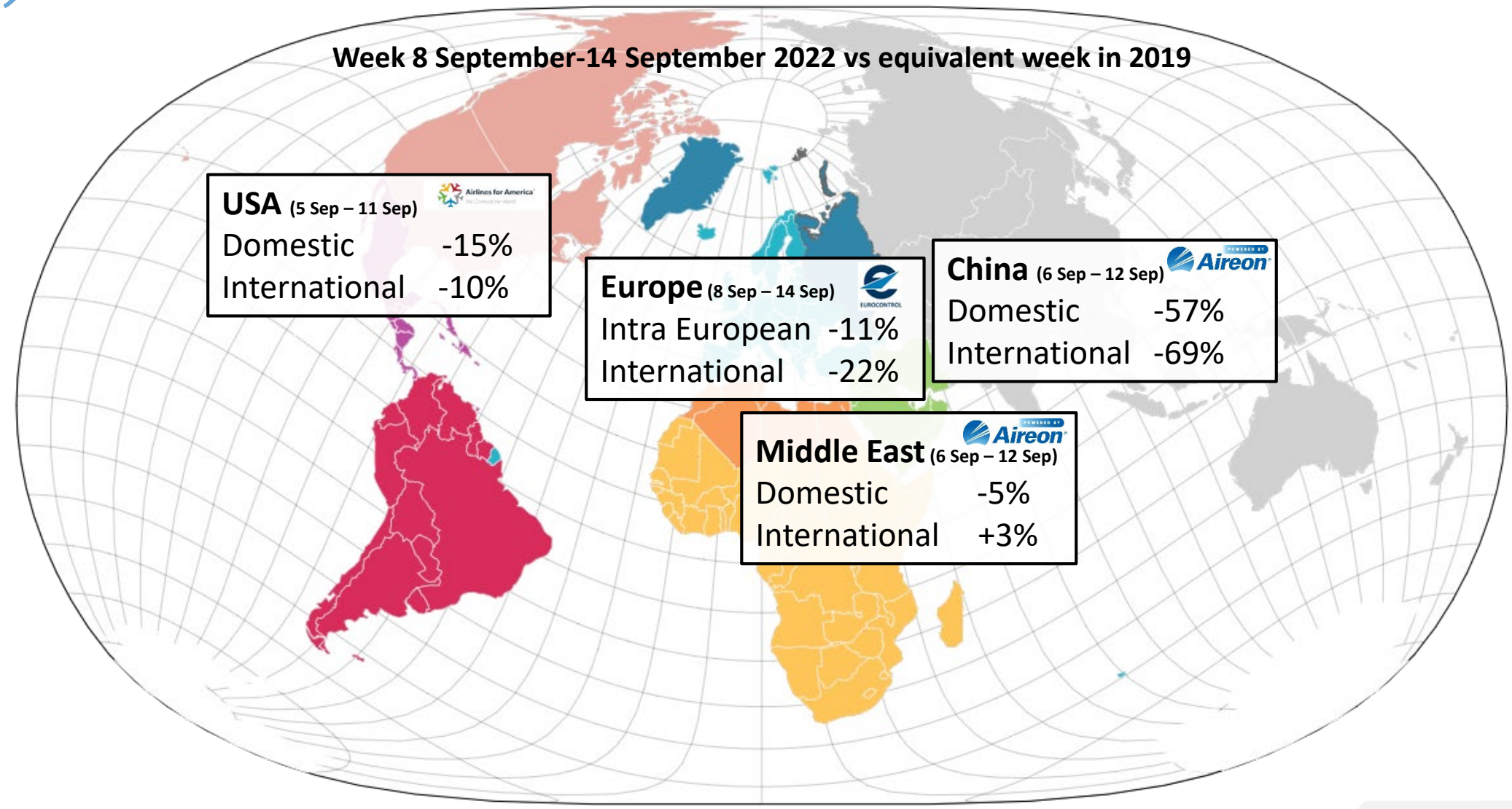
TRAFFIC FLOWS (AVERAGE DAILY DEPARTURE/ARRIVAL FLIGHTS FOR THE LAST WEEK)

- 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%.



REGION (Average daily flights)	Week 01/09/2022 - 07/09/2022	Week 08/09/2022 - 14/09/2022	%	vs. 2019
Intra-Europe	**24 376**	**24 267**	***-0%***	***-11%***
Europe<->Asia/Pacific	577	575	*-0%*	*-30%*
Europe<->Mid-Atlantic	159	149	*-6%*	*-2%*
Europe<->Middle-East	1 417	1 376	*-3%*	*-8%*
Europe<->North Atlantic	1 320	1 324	*+0%*	*-7%*
Europe<->North-Africa	1 097	1 044	*-5%*	*-5%*
Europe<->Other Europe	402	397	*-1%*	*-69%*
Europe<->South-Atlantic	157	157	*-0%*	*-19%*
Europe<->Southern Africa	285	282	*-1%*	*-8%*
Non Intra-Europe	**5 415**	**5 305**	***-2%***	***-22%***

OUTSIDE EUROPE (TRAFFIC SITUATION OVER THE LAST WEEK VS 2019)



COUNTRY PAIRS (AVERAGE DAILY FLIGHTS FOR THE LAST WEEK)

Top 20

Rank evolution over prev. week	Top 10 Country-Pair on week 08 - 14 Sep 2022				
	Country-Pair	Avg daily flights	Δ vs prev. week	% vs prev. week	% vs 2019
→	Spain <-> Spain	1 277	-25	-2%	-0%
↗	France <-> France	1 031	+81	+9%	-16%
↘	Italy <-> Italy	972	-30	-3%	+6%
→	Spain <-> United Kingdom	885	-27	-3%	-11%
→	Norway <-> Norway	868	+3	+0%	+2%
→	United Kingdom <-> United Kingdo	834	-8	-1%	-23%
→	Türkiye <-> Türkiye	819	-17	-2%	-15%
→	Germany <-> Germany	625	+54	+10%	-40%
→	Germany <-> Spain	572	+10	+2%	-11%
→	Germany <-> Türkiye	444	-32	-7%	+9%

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.

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

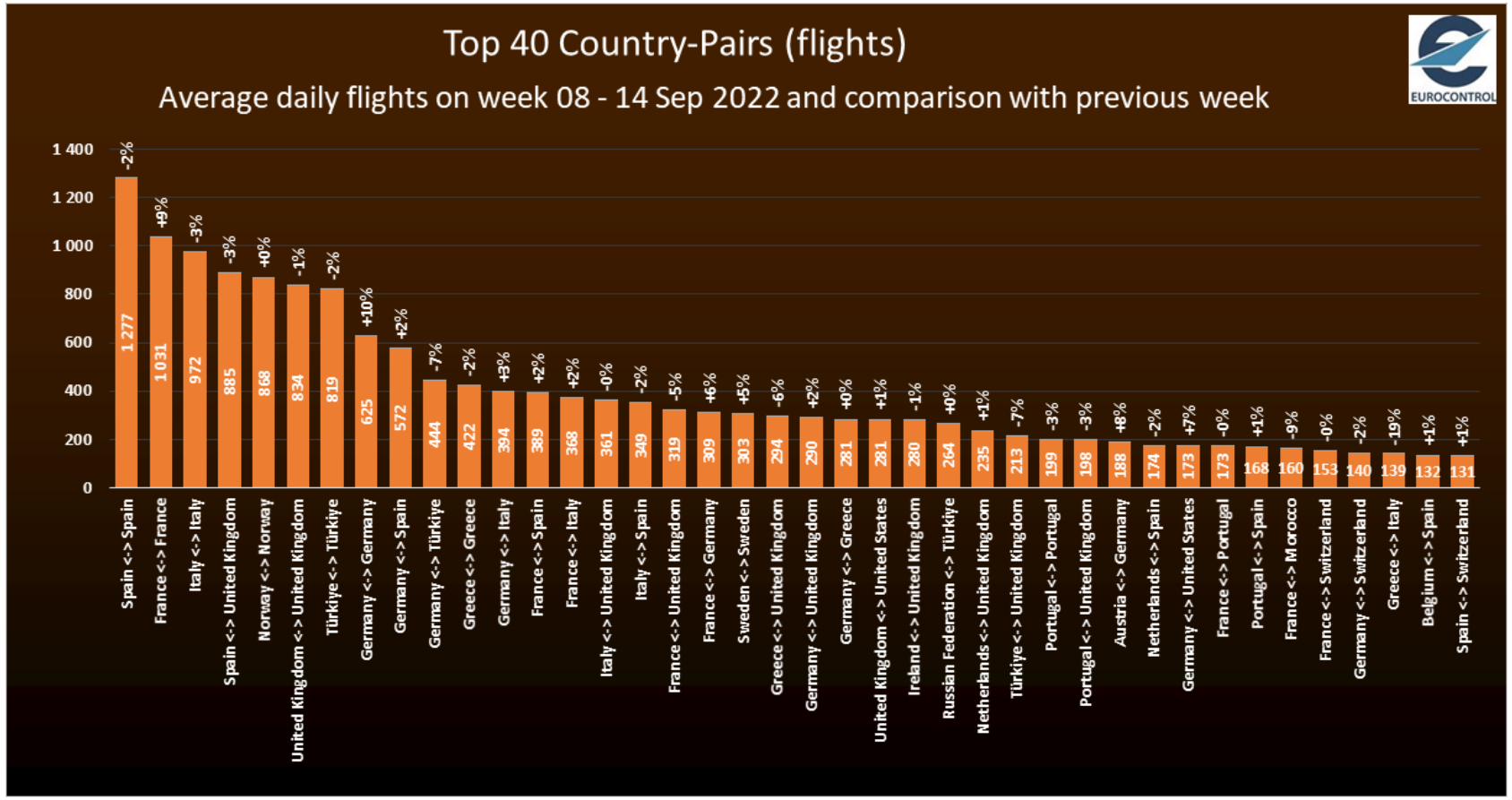
- **Germany-Türkiye** (-32flights; -7%) mainly due to Corendon, Turkish Airlines and Tailwind.
- **Italy-Italy** (-30 flights; -3%) mainly due to light AOs, Volotea and Blue Air.
- **Spain-UK** (-27 flights, -3%) mainly due to British Airways, easyJet and TUI.

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.

COUNTRY PAIRS (AVERAGE DAILY FLIGHTS FOR THE LAST WEEK)

Top 40



- Largest decreases in flights vs previous week for **Greece-Italy** (-19%), **Germany-Türkiye** (-7%), **Italy-Italy** (-3%), **Spain-UK** (-3%), **Spain-Spain** (-2%), **Greece-UK** (-6%),and **Türkiye-Türkiye** (-2%).
- Highest increases in flights vs previous week for **France-France** (+9%), **Germany-Germany** (+10%), **France-Germany** (+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 08 Sep - 14 Sep 2022				
	Airport	Average Daily Dep/Arr Flights	Δ over prev. week	% over prev. week	% vs 2019
→	IGA Istanbul Airport	1 334	-29	-2%	+6%
→	Amsterdam	1 304	-36	-3%	-14%
→	Paris/Charles-De-Gaulle	1 246	-27	-2%	-17%
↗	Frankfurt	1 159	+81	+7%	-26%
↘	London/Heathrow	1 110	-16	-1%	-19%
→	Madrid/Barajas	1 055	+15	+1%	-15%
↗	Munich	940	+49	+6%	-25%
↘	Barcelona	912	+2	+0%	-16%
→	Palma De Mallorca	868	-24	-3%	+1%
↘	Antalya	861	-48	-5%	-0%

- **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%).

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

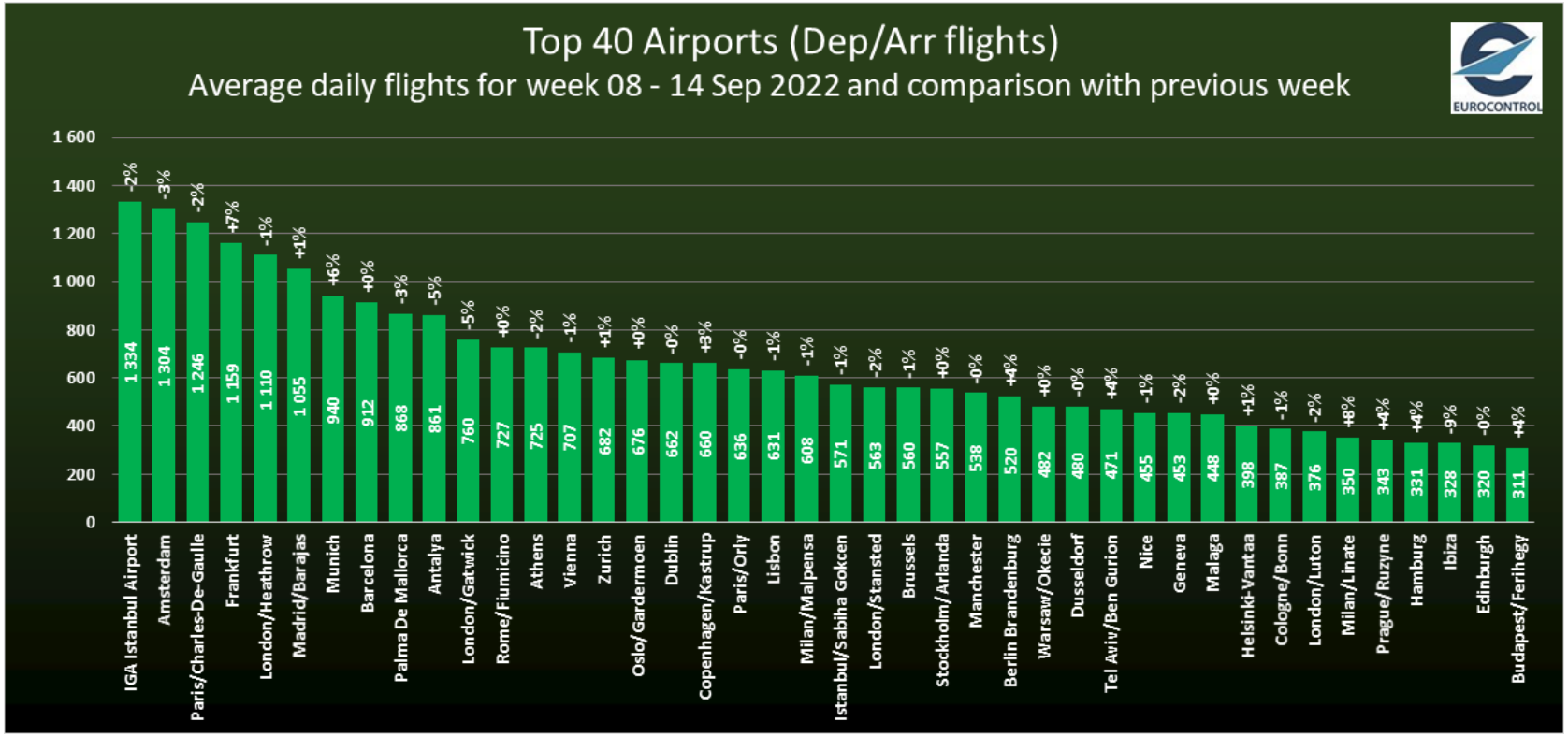
- **Amsterdam** (-36 flights; -3%) mainly due to KLM Group. Flows with France, Türkiye and Germany.
- **IGA Istanbul** (-29 flights; -2%) mainly due to Turkish Airlines. Main decreases on domestic flows.
- **Paris CDG** (-27 flights; -2%) mainly due to Air France and Nouvel Air Tunisie. Flows with Tunisia,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

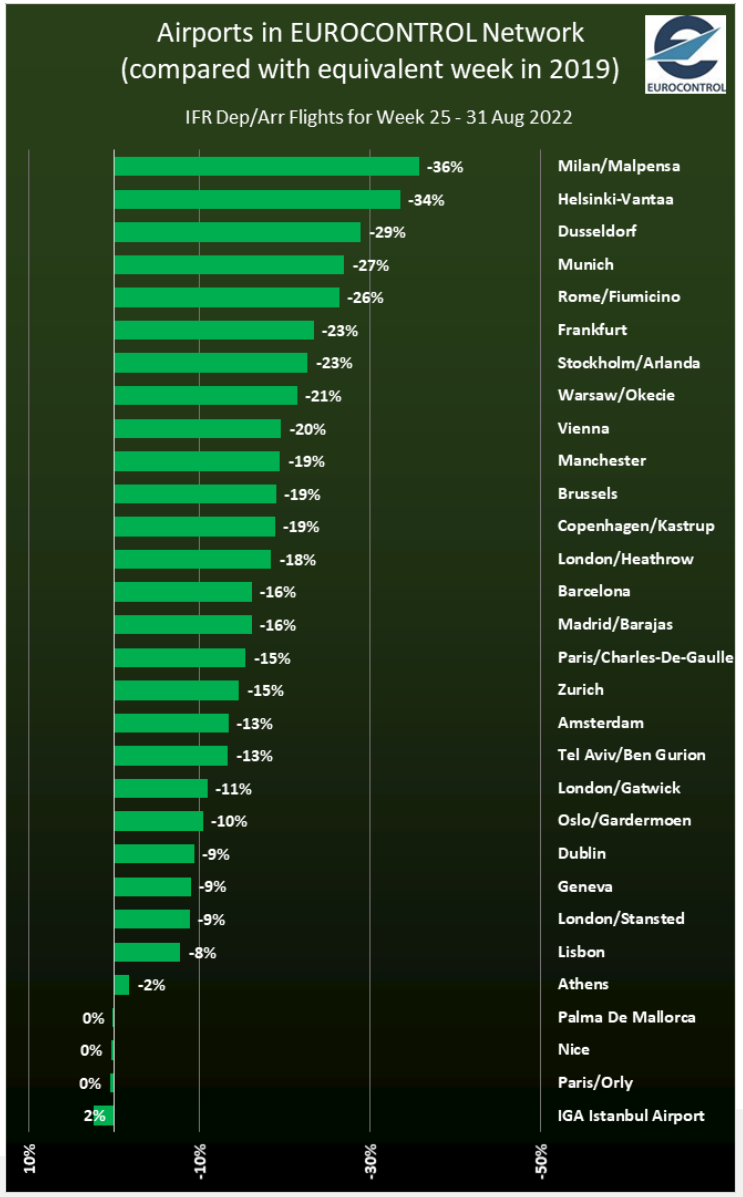
Increases for:

- **Frankfurt** (+81 flights; +7%) due to the counter effect of the Lufthansa strike on 2 September.

AIRPORTS (AVERAGE DAILY DEPARTURE/ARRIVAL FLIGHTS FOR THE LAST WEEK)

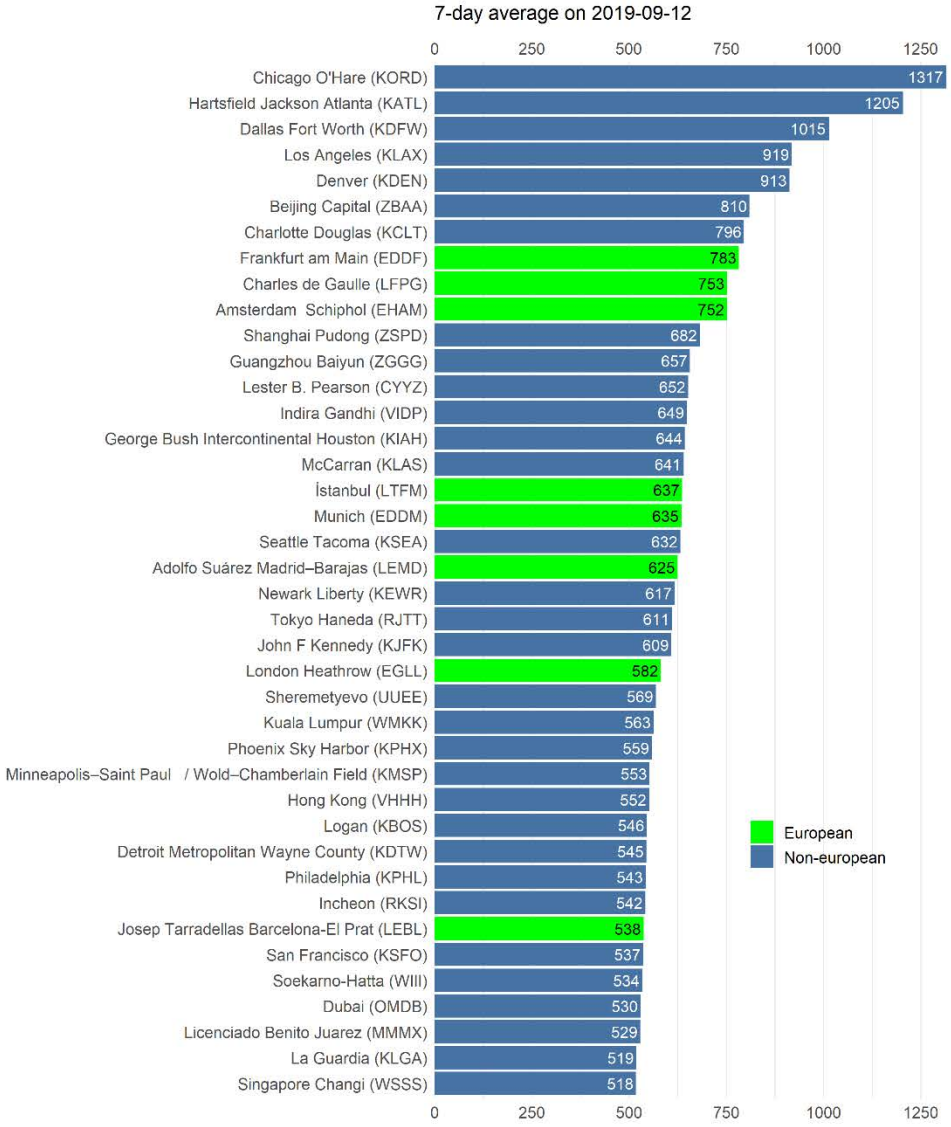
Top 40

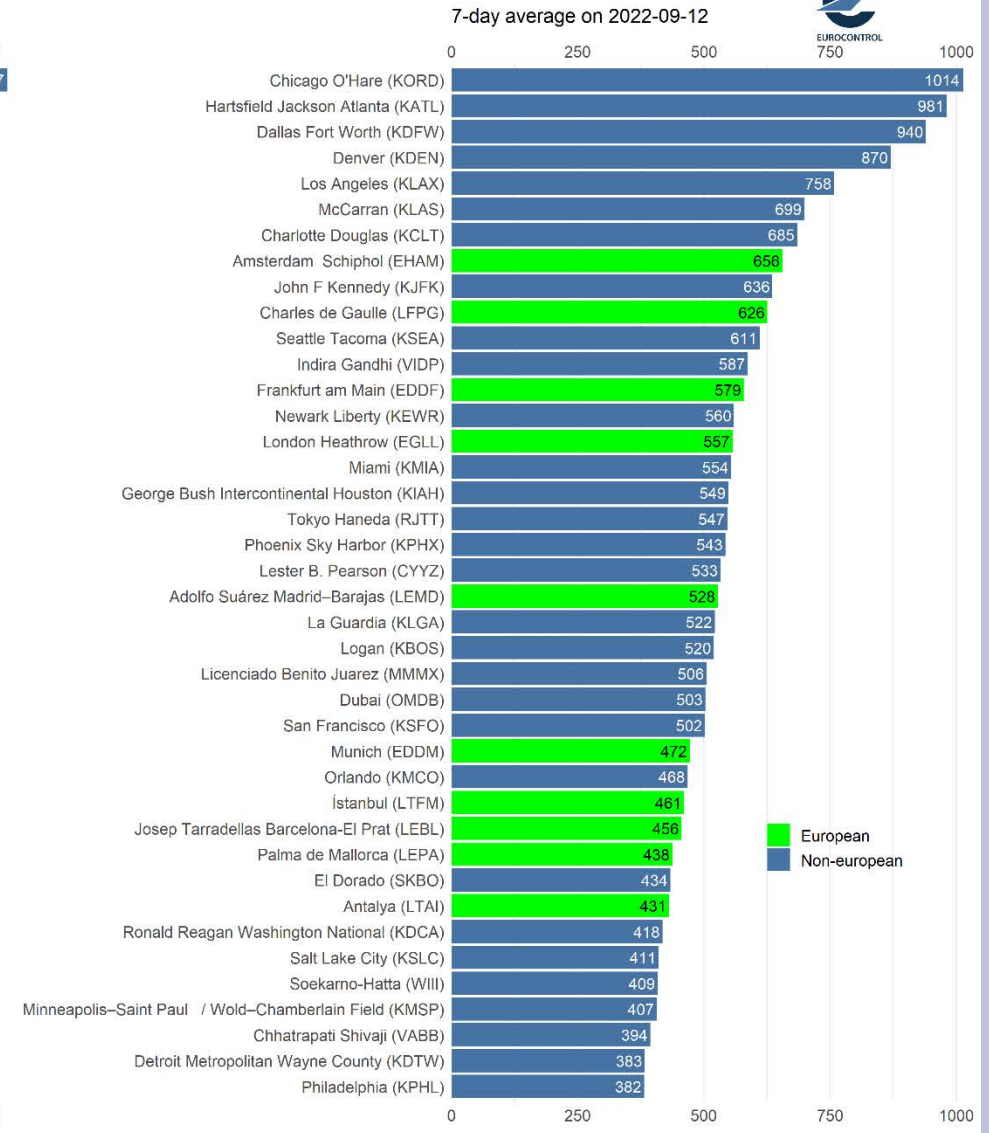




- Largest decreases in flights vs the previous week for **Antalya** (-5%), **London Gatwick** (-5%), **Amsterdam** (-3%), **Ibiza** (-9%), **IGA Istanbul** (-2%) and **Paris CDG** (-2%).
- Highest increases for **Frankfurt** (+7%), **Munich** (+6%) and **Milan Linate** (+8%).
- Traffic levels ranging from -36% (Milan) to +2% (IGA Istanbul) compared to 2019.

TOP 40 GLOBAL AIRPORTS (AVERAGE DAILY DEPARTURE FLIGHTS FOR THE LAST WEEK)



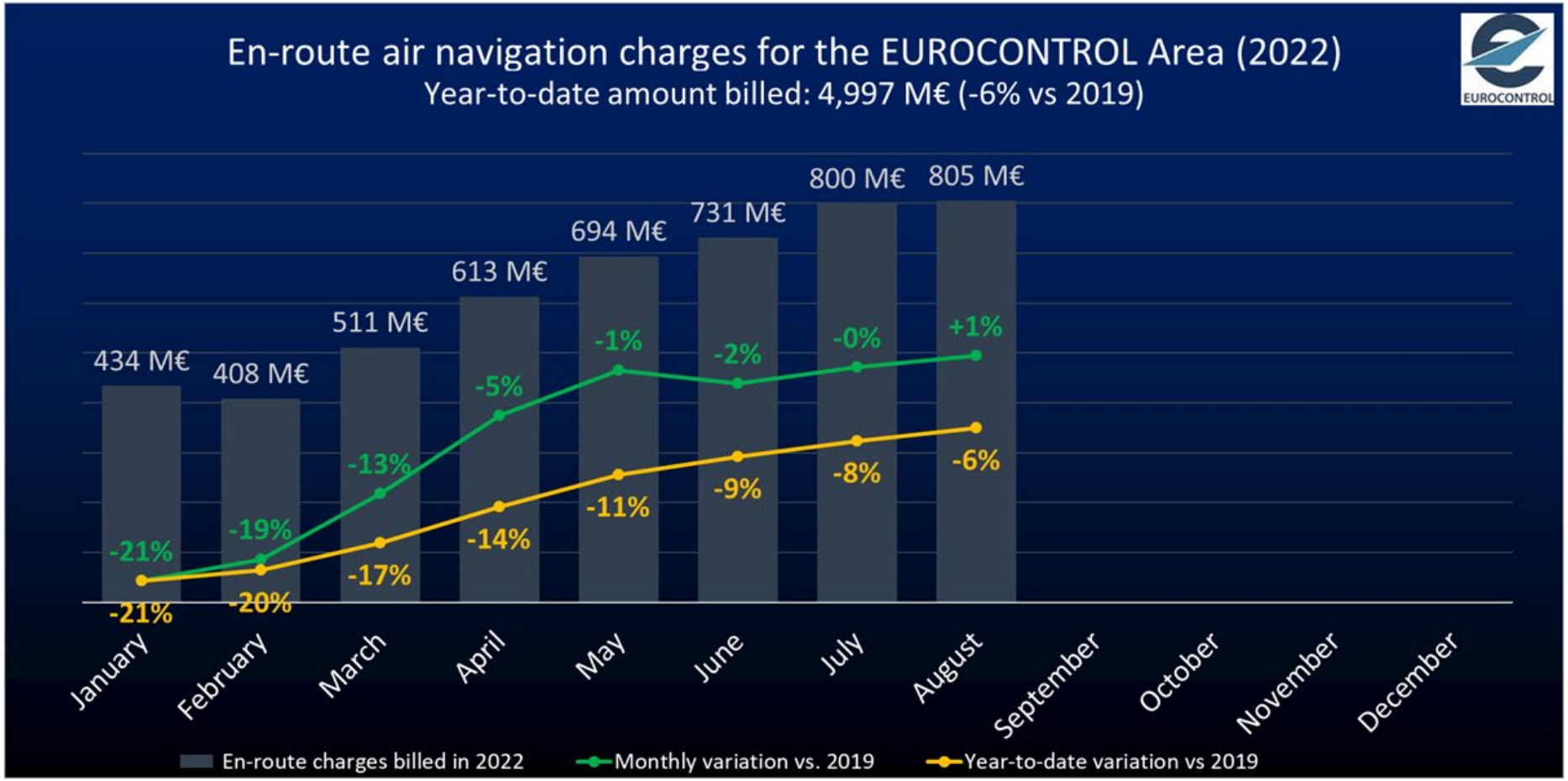


Source: Flightradar24 Historical Global Utilisation data

Comparing week ending 29 August (right) with the same week in 2019 (left):

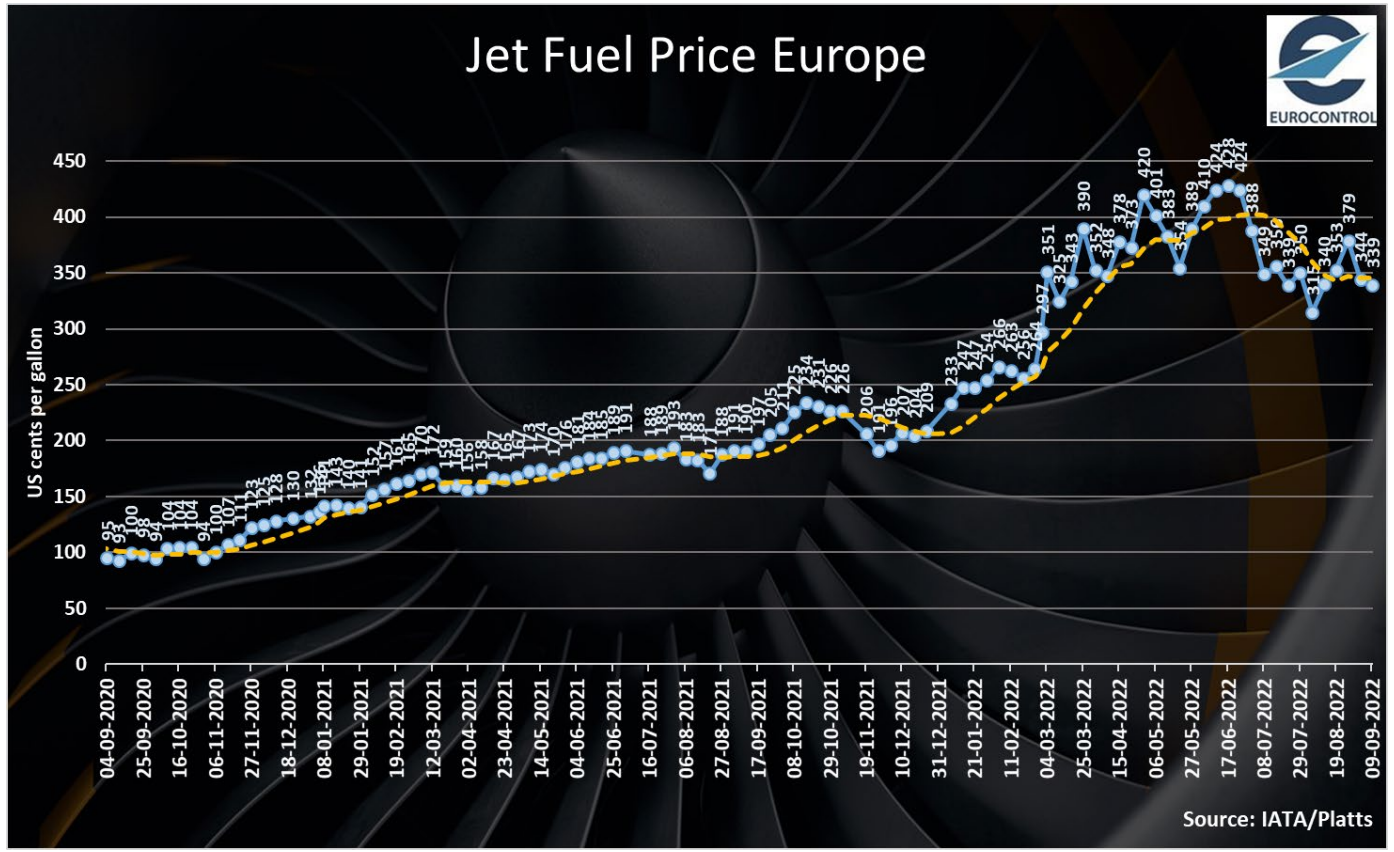
- **10 European airports** are ranked in the **Top 40** global airports (vs 8 in 2019)
- **Two European airports** are in the Top 10: Amsterdam (8th) and Paris CDG (10th).
- Frankfurt and London Heathrow are in the **Top 15**.
- Ten of the Top 15 global airports are currently **based** in **the US.**
- The **first Asian airport in 2022** is **New Delhi** (12th).

EN-ROUTE AIR NAVIGATION CHARGES



- **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**

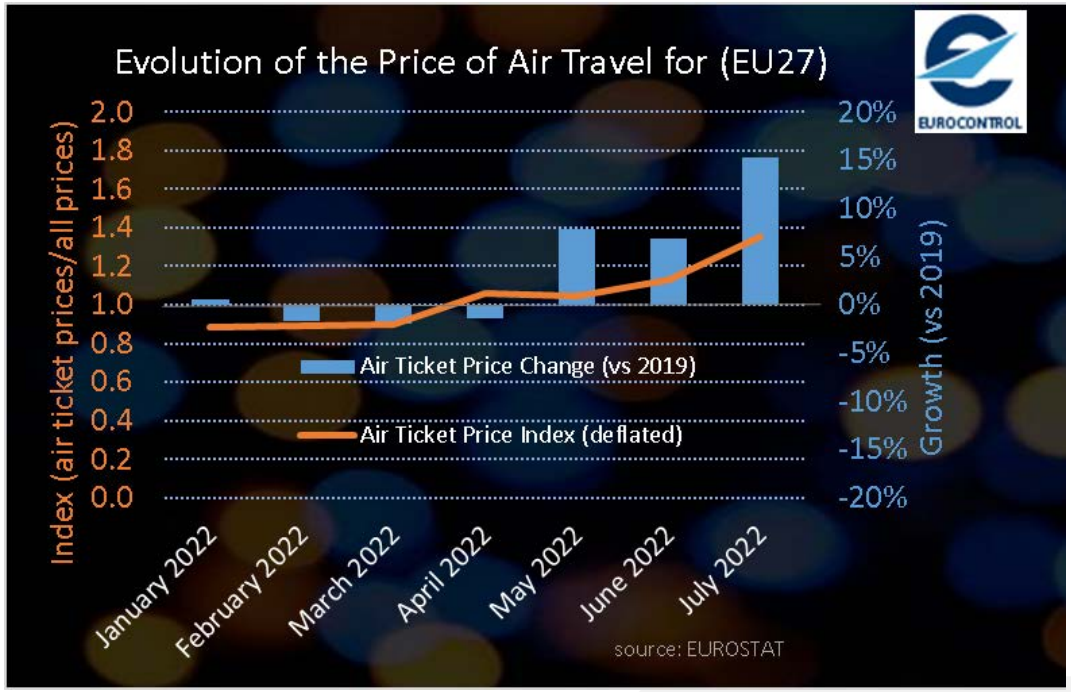
FUEL & TICKET PRICES



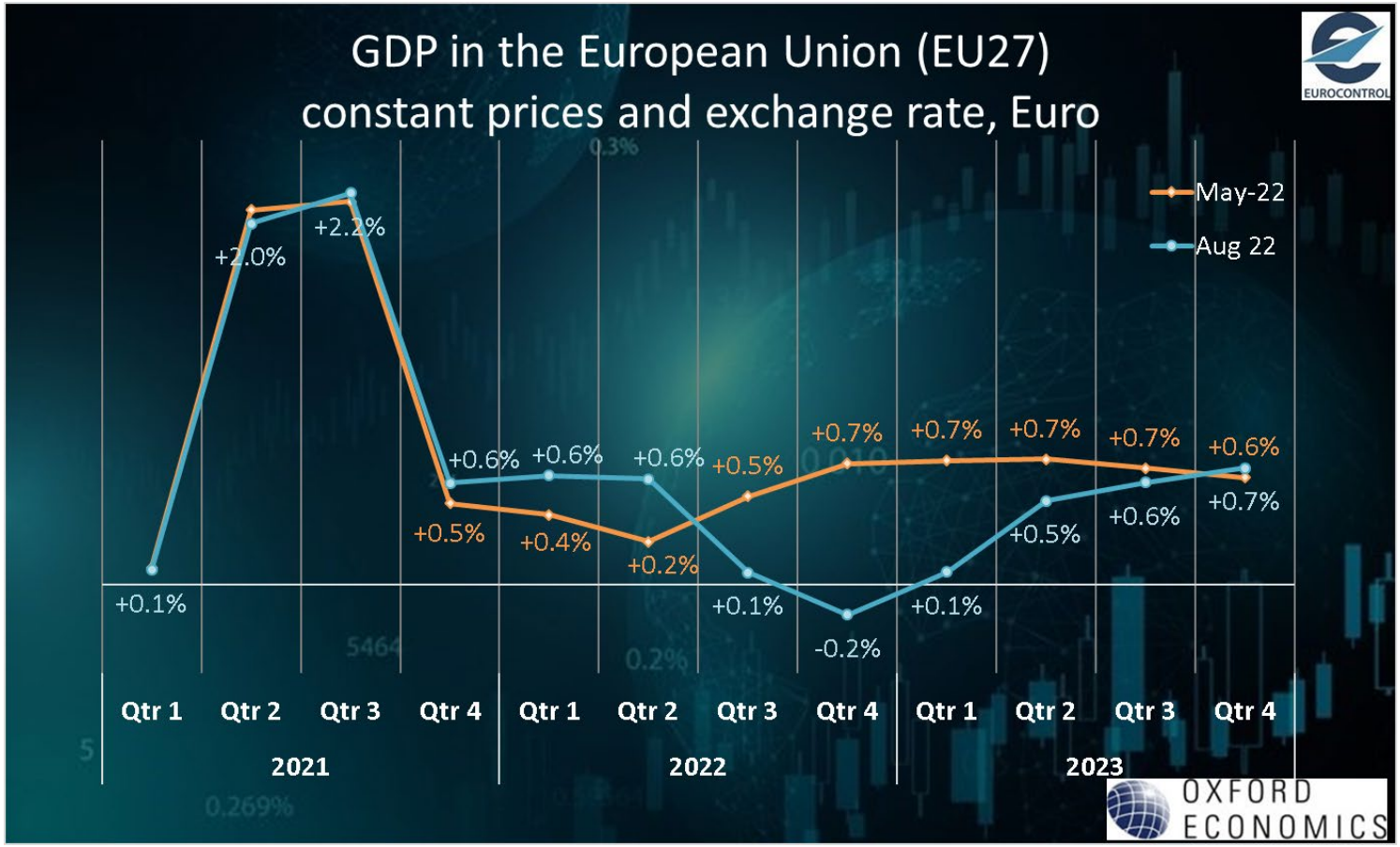
- **Jet fuel prices** dropped to 339 cts/gallon on 9 September (-11% over two weeks, +45% since early January).

- 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).



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