29 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 22 — 28 September 2022)

- **29,495 daily flights** on average over past week **(stable** on **previous week)**; 88% of 2019 levels.
- Network traffic (flights) is below the **base EUROCONTROL Traffic Scenario:** 87% for 1-28 September (vs 2019). On a **year-to-date basis**, 2022 reached 82% of 2019 levels.
- This week comparison to previous week is slightly (positively) biased due the recovery from mid-September disruptions (ATC French 1-day strike, adverse Weather conditions in the Canaries).
- **Ryanair** was the busiest aircraft operator last week with 2,991 flights per day on average (**+16%** vs 2019), followed by **easyJet** (1,637; -12% vs 2019), **Turkish Airlines** (1,369; -2% vs 2019), **Lufthansa** (1,181; -26% vs 2019), **Air France** (1,058; -16% vs 2019), **Wizz Air** (789; +19% vs 2019) and **KLM** (774; -19% vs 2019).
- Intra-regional/Domestic traffic vs 2019: Europe is still **below** (-10%), USA (-14%), China (-44%) and Middle-East (+2%).
- **Two** European airports (**IGA Istanbul** and **Amsterdam**) are in the Top 10 Global airports.
- **Arrival punctuality** (within 15 minutes) is above to **72%** while **departure punctuality** is just above **66%**.
- In recent days, **ATFM delays** were **below 2019**.
- **Jet fuel prices down** to **302 cts/gallon** on 23 September (-11% over two weeks, **+29% since early January**).

Traffic Situation

Average daily flights (including overflights)

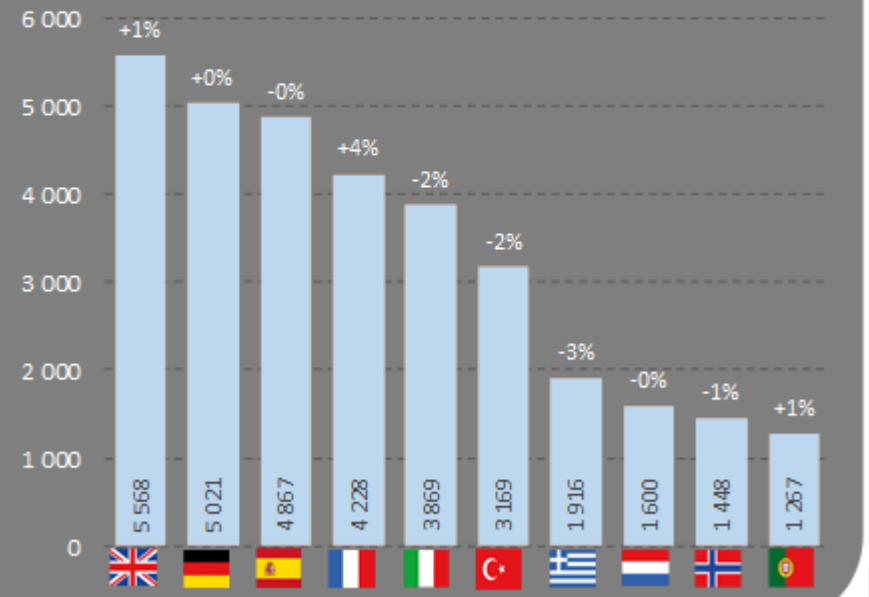
On week 22 - 28 Sep 2022

88% of equivalent week in 2019

Top 10 Busiest States

on week 22 - 28 Sep 2022 (avg daily flights)

(Dep/Arr flights and comparison with previous week)

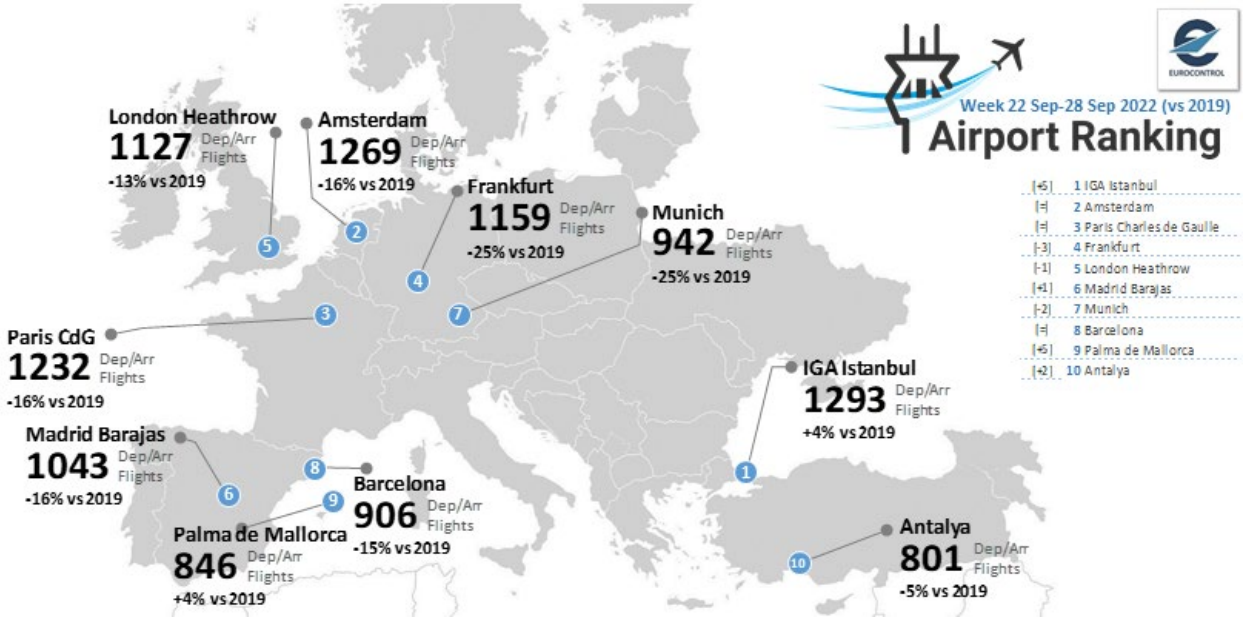


Top 10 Aircraft Operators

on Week 22 - 28 Sep 2022 (avg daily flights)

1. Ryanair Group — Operated 2 991 flights — ↑16% vs same week in 2019 — ↑2% vs prev week
2. easyJet Group — Operated 1 637 flights — ↓12% vs same week in 2019 — ↑2% vs prev week
3. Turkish Airlines — Operated 1 369 flights — ↓2% vs same week in 2019 — ↓2% vs prev week
4. Lufthansa Airlines — Operated 1 181 flights — ↓26% vs same week in 2019 — ↑1% vs prev week
5. Air France Group — Operated 1 058 flights — ↓16% vs same week in 2019 — ↑6% vs prev week
6. Wizz Air Group — Operated 789 flights — ↑19% vs same week in 2019 — ↓3% vs prev week
7. KLM Group — Operated 774 flights — ↓19% vs same week in 2019 — ↑0% vs prev week
8. British Airways Grp — Operated 706 flights — ↓20% vs same week in 2019 — ↑2% vs prev week
9. SAS Group — Operated 655 flights — ↓29% vs same week in 2019 — ↑1% vs prev week
10. Vueling — Operated 654 flights — ↓5% vs same week in 2019 — ↑1% vs prev week

TOP 10 AIRPORTS, FLOWS AND MARKET SEGMENTS



Market Segments

on week 22 – 28 Sep 2022 (vs 2019)

- ↓6% Low cost
- ↓20% Mainline
- ↓24% Regional
- ↑18% Business Aviation
- ↓23% Non-Scheduled/ Charter
- ↓0% All Cargo

Traffic Flow

Average daily flights on week of 22 - 28 Sep 2022

	Flights	vs previous week	vs 2019
Intra-European	23 606	-0%	-10%
Intercontinental	5 213	-0%	-22%

Economics

(23 September 2022)

Fuel price

↓302 cents/gallon

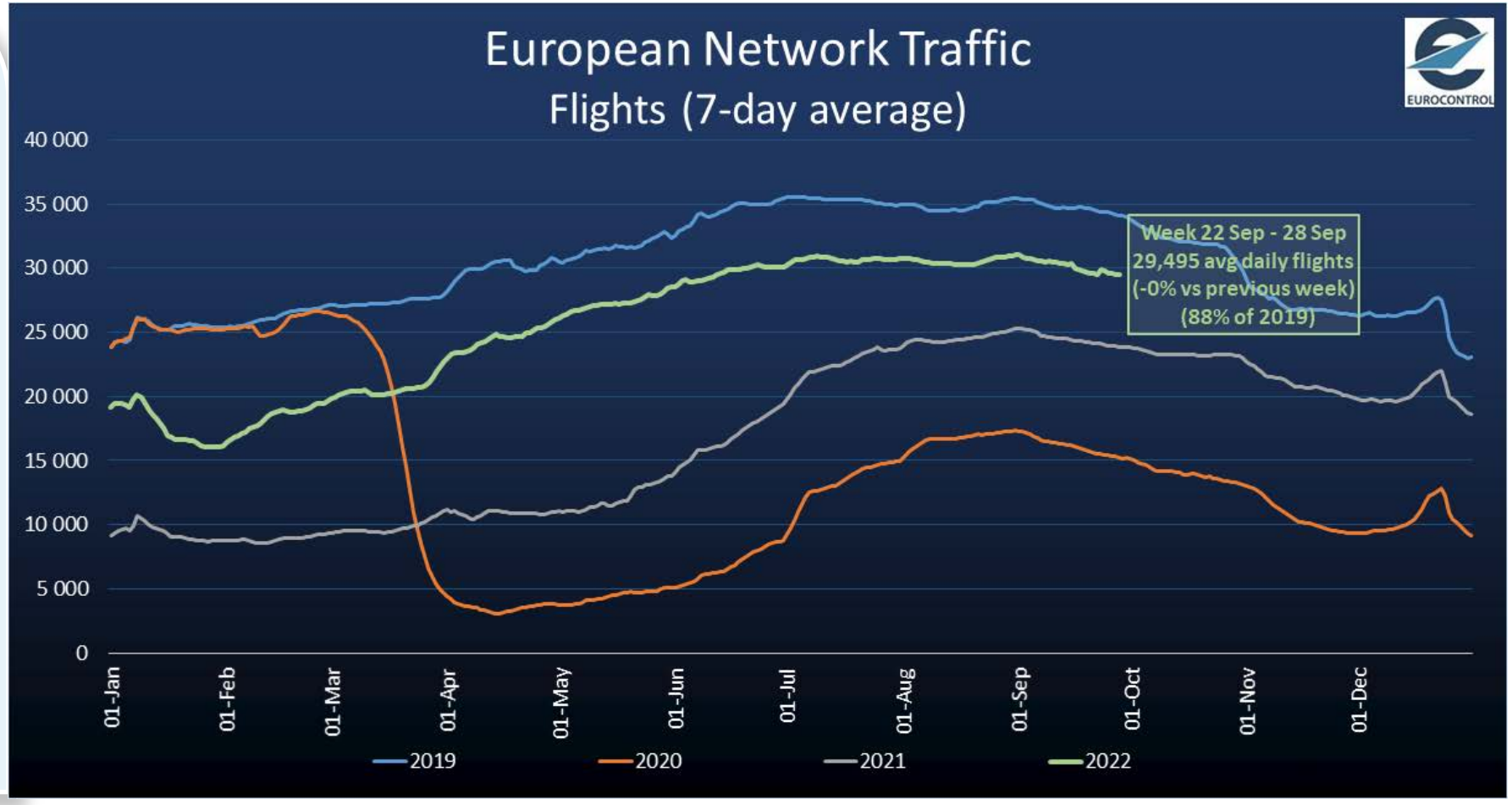
compared to **339 cents/gallon on 9 September 2022**

Source: IATA/Platts

OVERALL TRAFFIC SITUATION AT NETWORK LEVEL

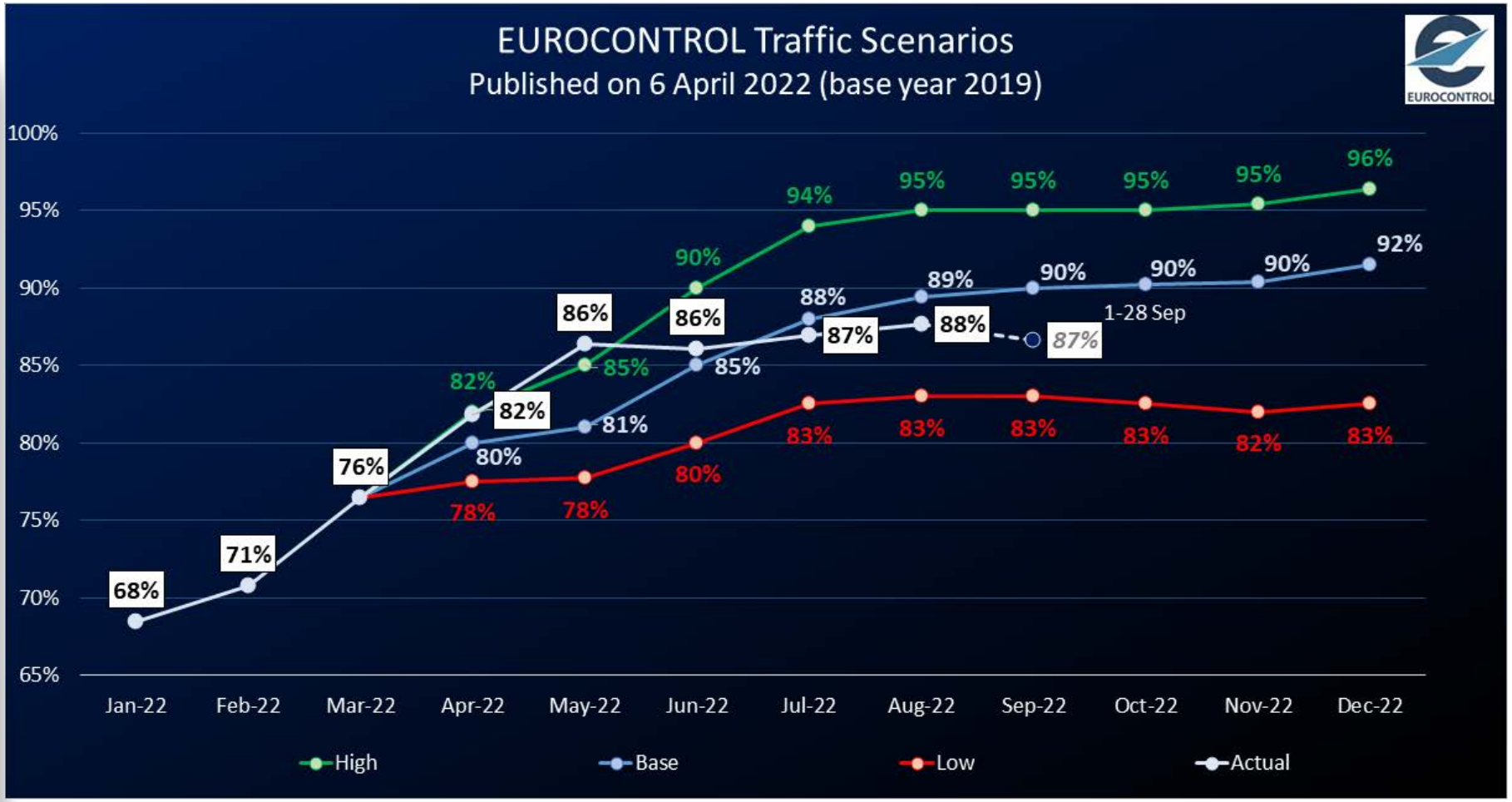
On week 22 Sep – 28 Sep:

- **29,495** average daily flights.
- **Stable** on previous week.
- **88%** of 2019 traffic levels.
- Since mid-September, traffic volumes (flights) have levelled off, just below 30,000 flights per day in the network.

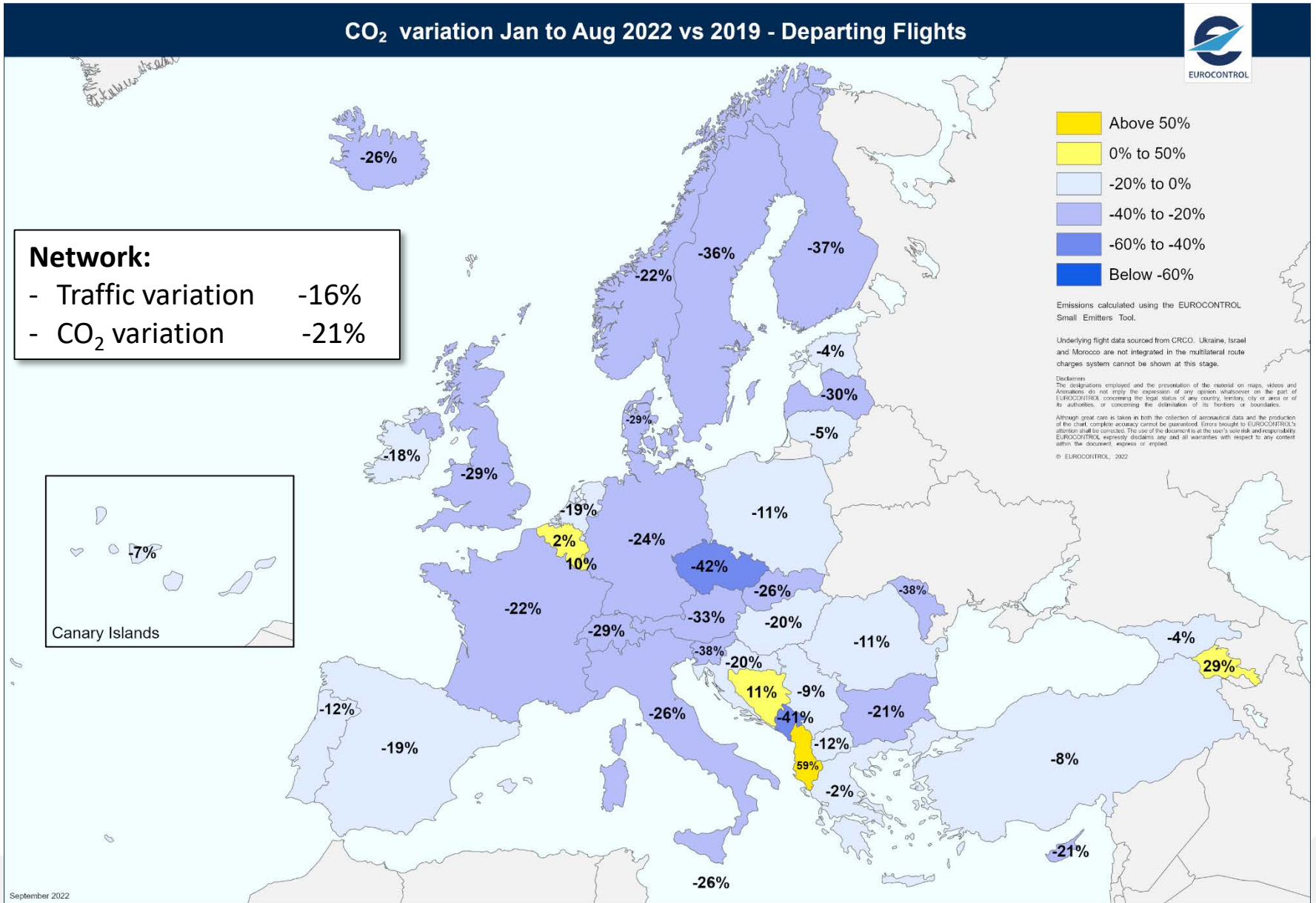


CURRENT SITUATION COMPARED TO THE LATEST EUROCONTROL TRAFFIC SCENARIOS

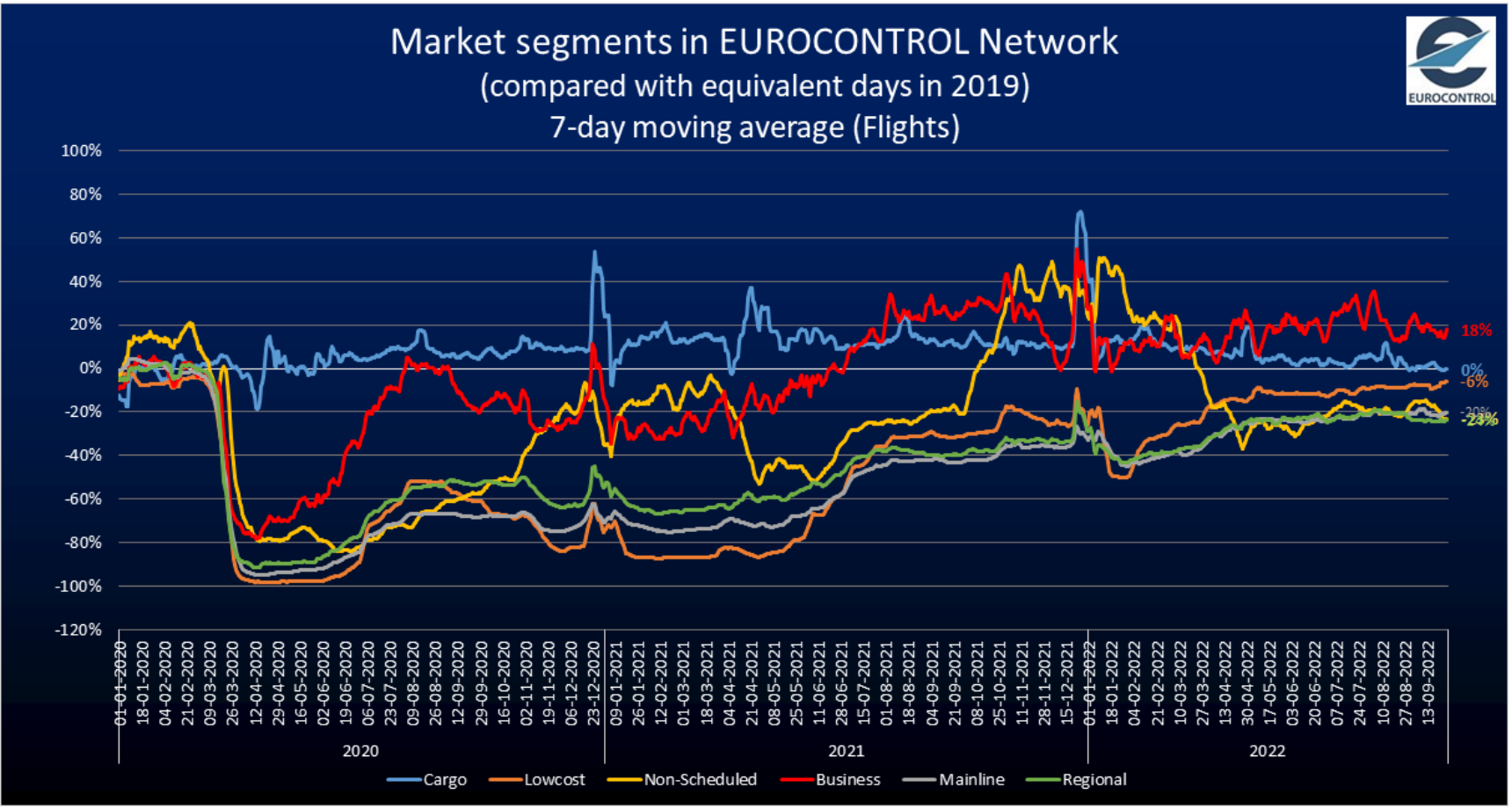
- The last EUROCONTROL Traffic scenarios have been published on 6 April 2022.
- Since **the beginning of September**, network traffic (flights) is at **87% of 2019** levels, below the base scenario.
- On a year to date basis, network traffic in 2022 stands at **82**% of 2019.



AVIATION SUSTAINABILITY



MARKET SEGMENTS



End September 2022, compared to 2019:

- Two segments are at or above 2019 levels: **Business Aviation** (+18%) and **All-cargo** (+0%).
- **Low-Cost** (-6% vs 2019) recorded a continuous recovery at the beginning of 2022, plateaued at -8% during the summer months and continue to recover (-6%) in September.
- **Mainline** (-20%) 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 (22 - 28 Sep 2022)		
	Average flights per day	% vs 2019	% over previous week
RYANAIR	2 991	+16%	+2%
easyJet	1 637	-12%	+2%
TURKISH AIRLINES	1 369	-2%	-2%
Lufthansa	1 181	-26%	+1%
AIRFRANCE	1 058	-16%	+6%
Wizz	789	+19%	-3%
KLM	774	-19%	+0%
BRITISH AIRWAYS	706	-20%	+2%
Scandinavian Airlines	655	-29%	+1%
vueling	654	-5%	+1%

- **Ryanair** is the busiest Aircraft Operator with 2,991 flights per day on average over last week, followed by **easyJet** (1,637), **Turkish Airlines** (1,639), **Lufthansa** (1,181), **Air France** (1,058), **Wizz Air** (789) and **KLM** (774).
- The ranking remains unchanged compared to two weeks ago.

Within the top 10, **eight airlines** posted **increases** over the previous week, most of these being artificial increases as a result of the ATC strike in France (16 Sept).

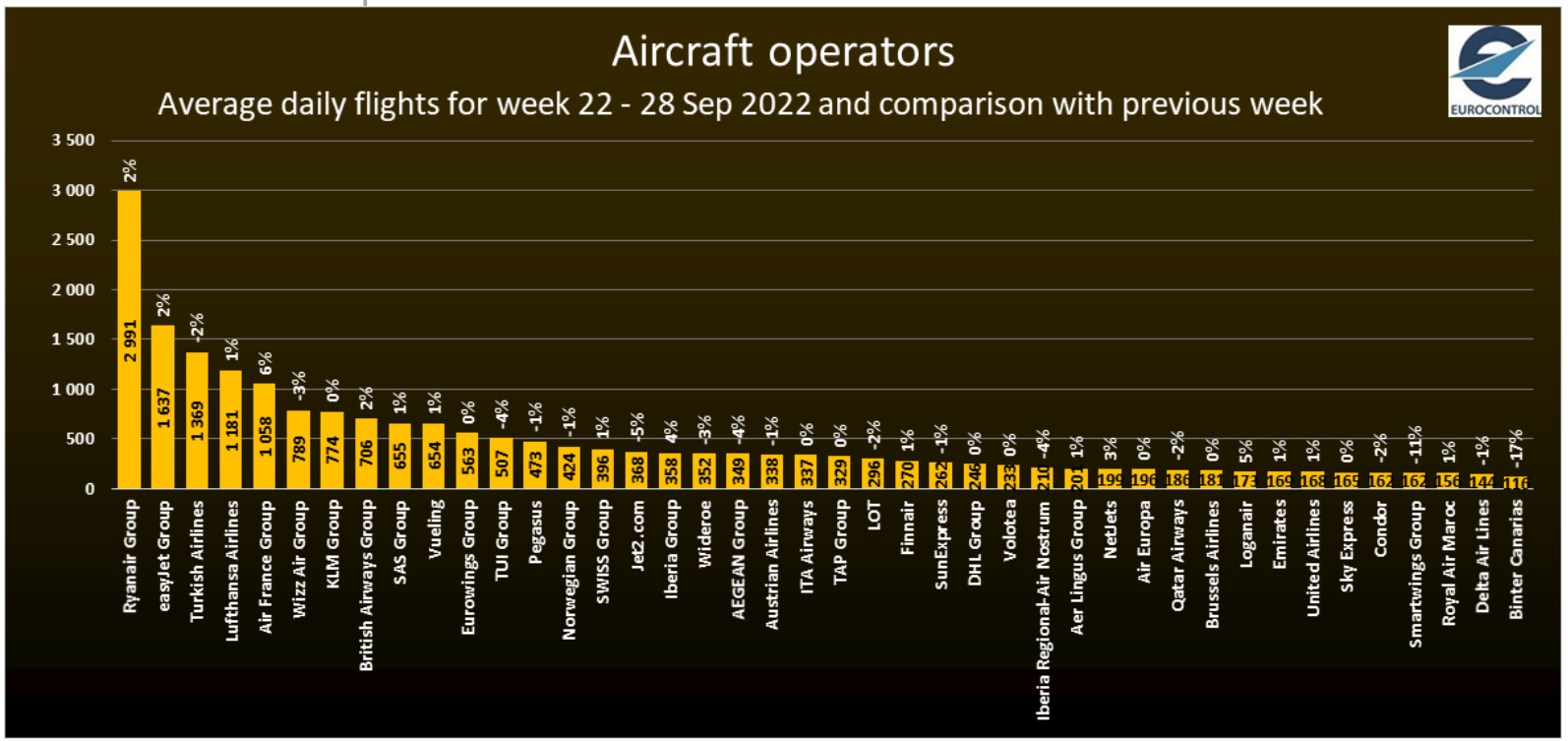
- **Air France** (+60 flights; +6%) mainly due to domestic and flows France-Italy, France-Germany, France-Spain and France-UK.
- **Ryanair** (+55 flights; +2%) mainly due to flows Spain-UK, Germany-Spain, France-UK, France-Spain, France-Italy.
- **easyJet** (+38 flights; +2%) mainly due to domestic flows in France and flows Spain-UK, France-Spain, France-Italy.

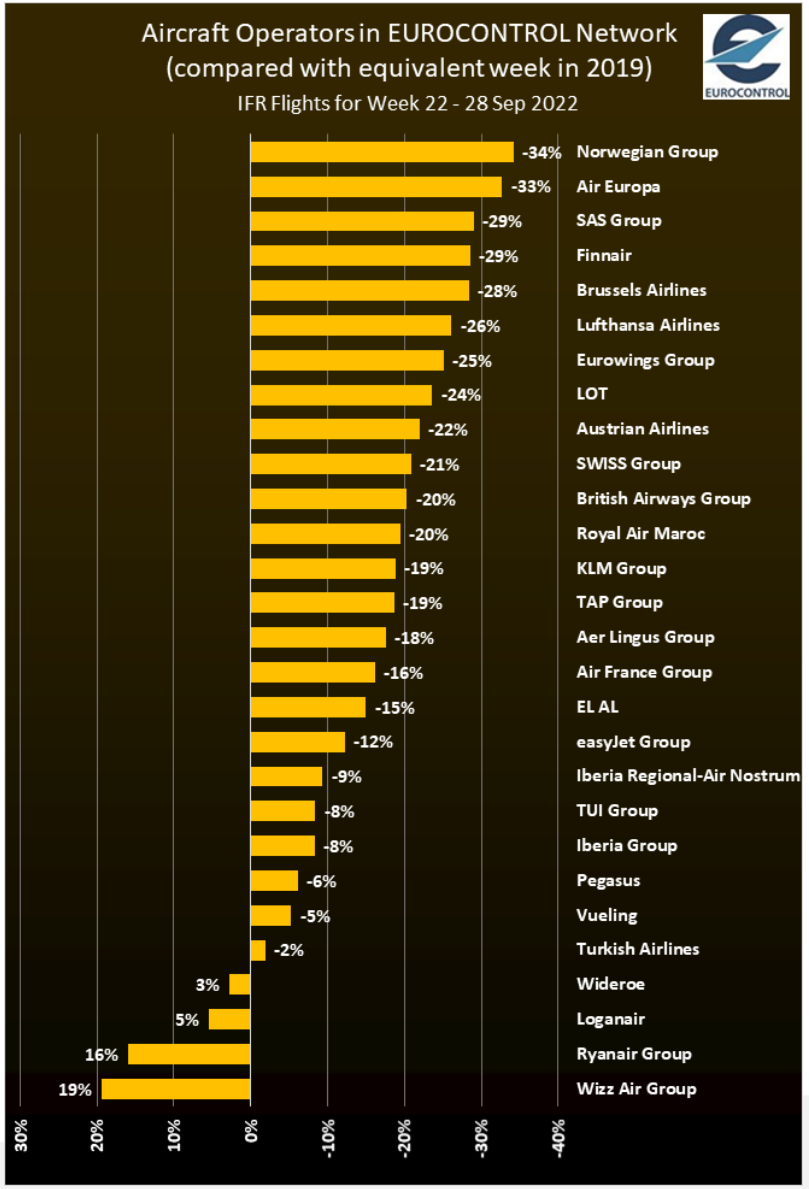
Also **decreases** for:

- **Turkish Airlines** (-31 flights; -2%) mainly owing to domestic flows in Türkiye and flows with Iraq and UK.

AIRCRAFT OPERATORS (AVERAGE DAILY FLIGHTS FOR THE LAST WEEK)

Top 40

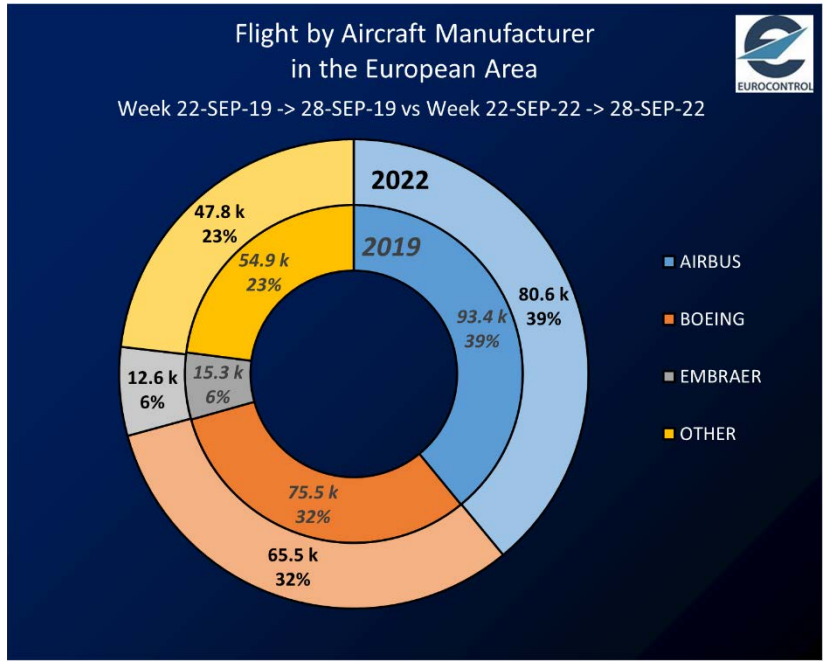




- Highest increases in flights vs previous week for **Air France Group** (+6%), **Ryanair Group** (+2%), **easyJet Group** (+2%), **Iberia Group** (+4%) and **British Airways Group** (+2%). Mostly, a bounce back effect of the French 24h-ATC strike the week before.
- Largest decreases for **Turkish Airlines** (-2%), **Wizz Air Group** (-3%) and **Binter Canarias** (-17%, due to severe weather condition in the Canary islands).
- Traffic levels ranging from -34% (**Norwegian**) to +19% (**Wizz Air**) vs 2019.

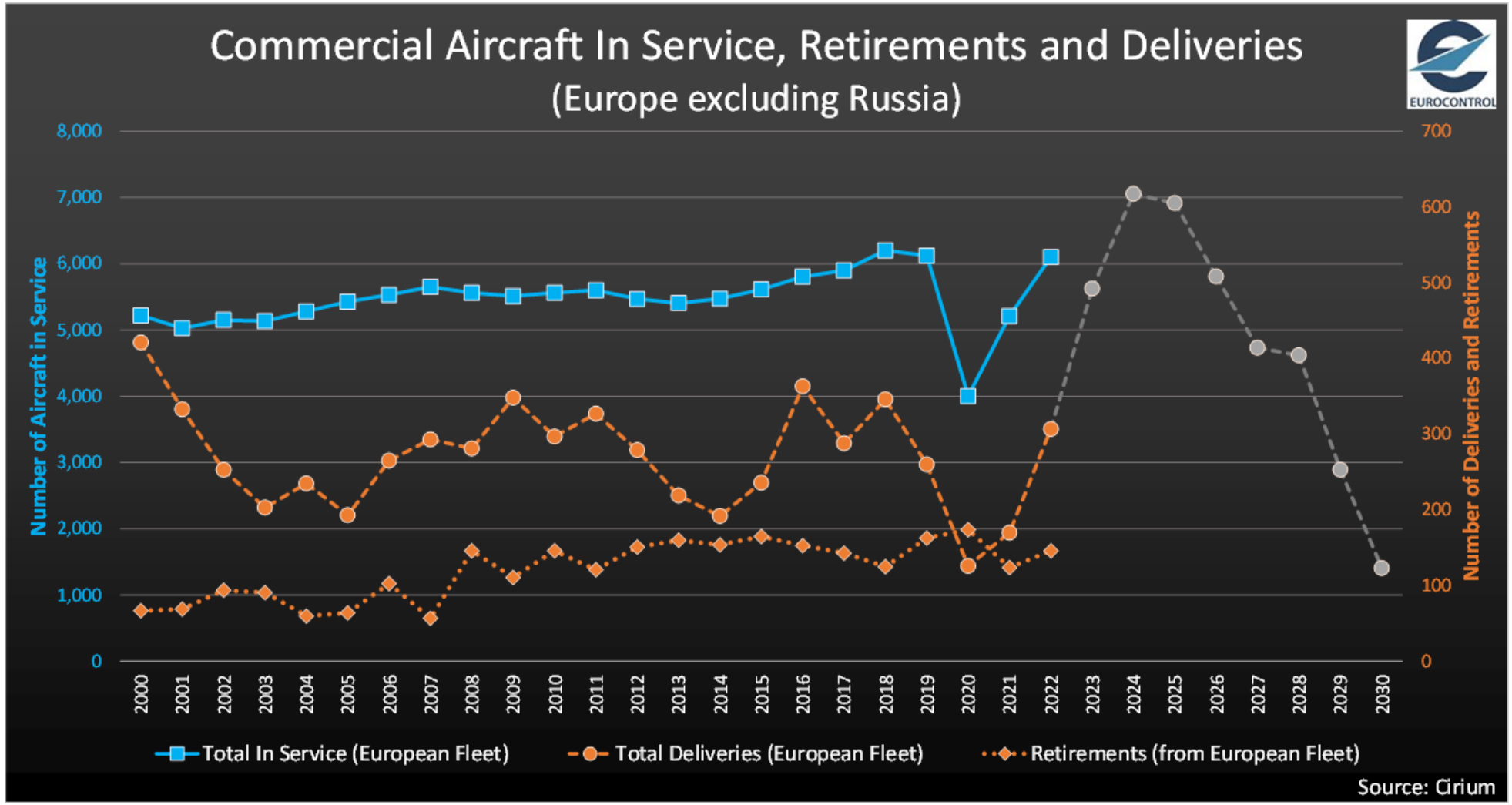
AIRCRAFT MANUFACTURERS (SHARE OF FLIGHTS FOR THE LAST WEEK)

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 22 - 28 September 2022

DHL
OPERATED 246 flights/day
+28% compared to the equivalent week in 2019

ASL AIRLINES BELGIUM
OPERATED 66 flights/day
-14% compared to the equivalent week in 2019

FedEx
OPERATED 56 flights/day
-9% compared to the equivalent week in 2019

UPS
OPERATED 50 flights/day
+13% compared to the equivalent week in 2019

PERFORMANCE OF MAJOR LONG-HAUL/LEGACY CARRIERS

for the week 22 - 28 September 2022

Lufthansa
OPERATED 1181 flights/day
-26% compared to the equivalent week in 2019

TURKISH AIRLINES
OPERATED 1369 flights/day
-2% compared to the equivalent week in 2019

AIRFRANCE
OPERATED 1058 flights/day
-16% compared to the equivalent week in 2019

BRITISH AIRWAYS
OPERATED 706 flights/day
-20% compared to the equivalent week in 2019

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

SAS
OPERATED 655 flights/day
-29% compared to the equivalent week in 2019

PERFORMANCE OF MAJOR LOW-COST CARRIERS

for the week 22 - 28 September 2022

RYANAIR
OPERATED 2991 flights/day
+16% compared to the equivalent week in 2019

easyJet
OPERATED 1637 flights/day
-12% compared to the equivalent week in 2019

Wizz
OPERATED 789 flights/day
+19% compared to the equivalent week in 2019

vueling
OPERATED 654 flights/day
-5% compared to the equivalent week in 2019

PEGASUS
OPERATED 473 flights/day
-6% compared to the equivalent week in 2019

Eurowings
OPERATED 563 flights/day
-25% compared to the equivalent week in 2019

PERFORMANCE OF MAJOR REGIONAL CARRIERS*

for the week 22 - 28 September 2022

widerøe
OPERATED 352 flights/day
+3% compared to the equivalent week in 2019

AIR NOSTRUM LINEAS AEREAS
OPERATED 210 flights/day
-9% compared to the equivalent week in 2019

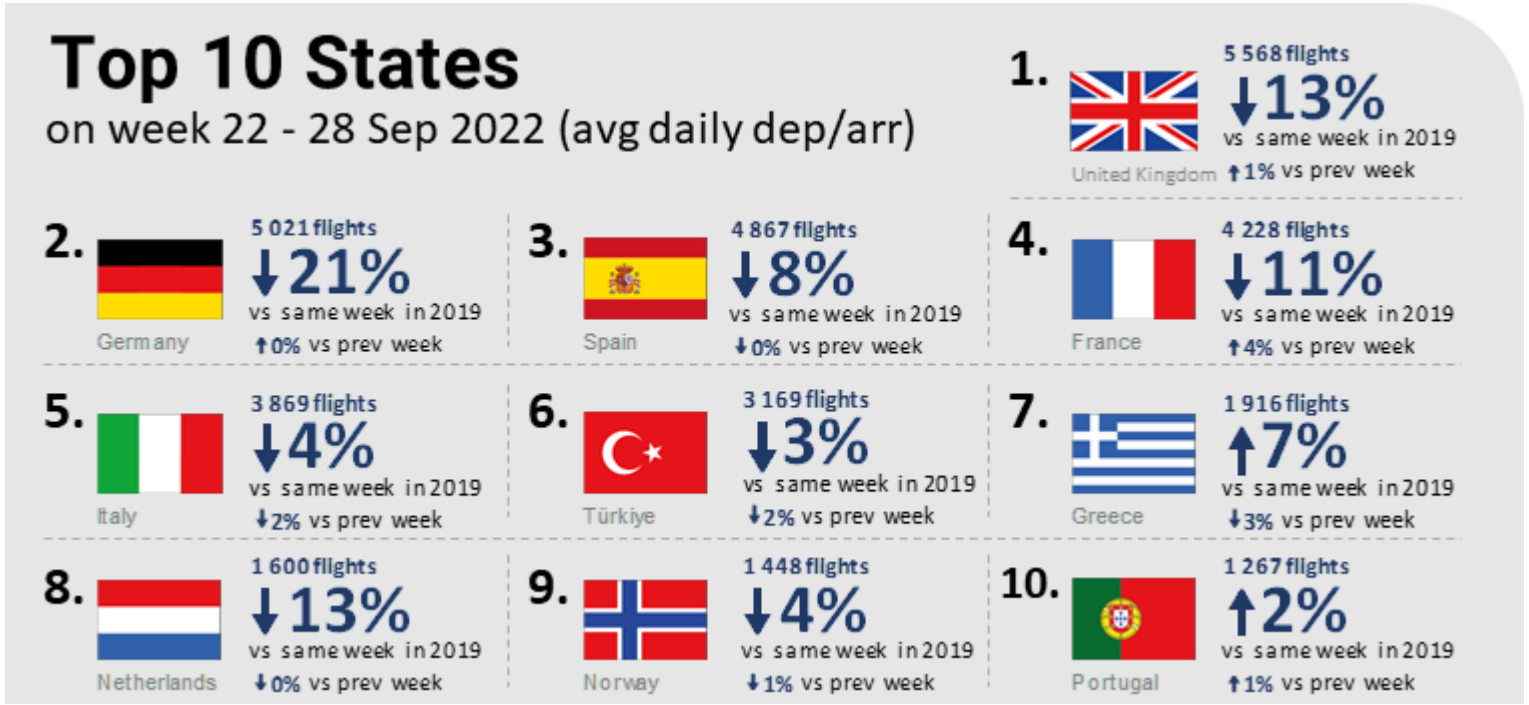
Loganair Scotland's Airline
OPERATED 173 flights/day
+5% compared to the equivalent week in 2019

Binter
OPERATED 116 flights/day
-5% compared to the equivalent week in 2019

OLYMPIC AIR
OPERATED 74 flights/day
-62% 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 (5,568) followed by **Germany** (5,021), **Spain** (4,867), **France** (4,228), **Italy** (3,869) and **Türkiye** (3,169).
- In this top 10, **Greece** and **Portugal** are the only States having exceeded their 2019 traffic volumes (by 7% and 2% respectively).

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

- **Italy** (-69 flights; -2%) mainly due to light AOs, Volotea, NetJets and Wizz Air. Notably on domestic flows, flows with Switzerland, Germany and Greece.
- **Greece** (-63 flights; -3%) mainly due to Aegean, Wizz Air and light AOs. Flows with Italy, UK, Romania and domestic flows.
- **Türkiye** (-51 flights; -2%) mainly due to Turkish Airlines, light AOs and Pegasus. Mainly domestic flows and flows with Serbia and Romania.

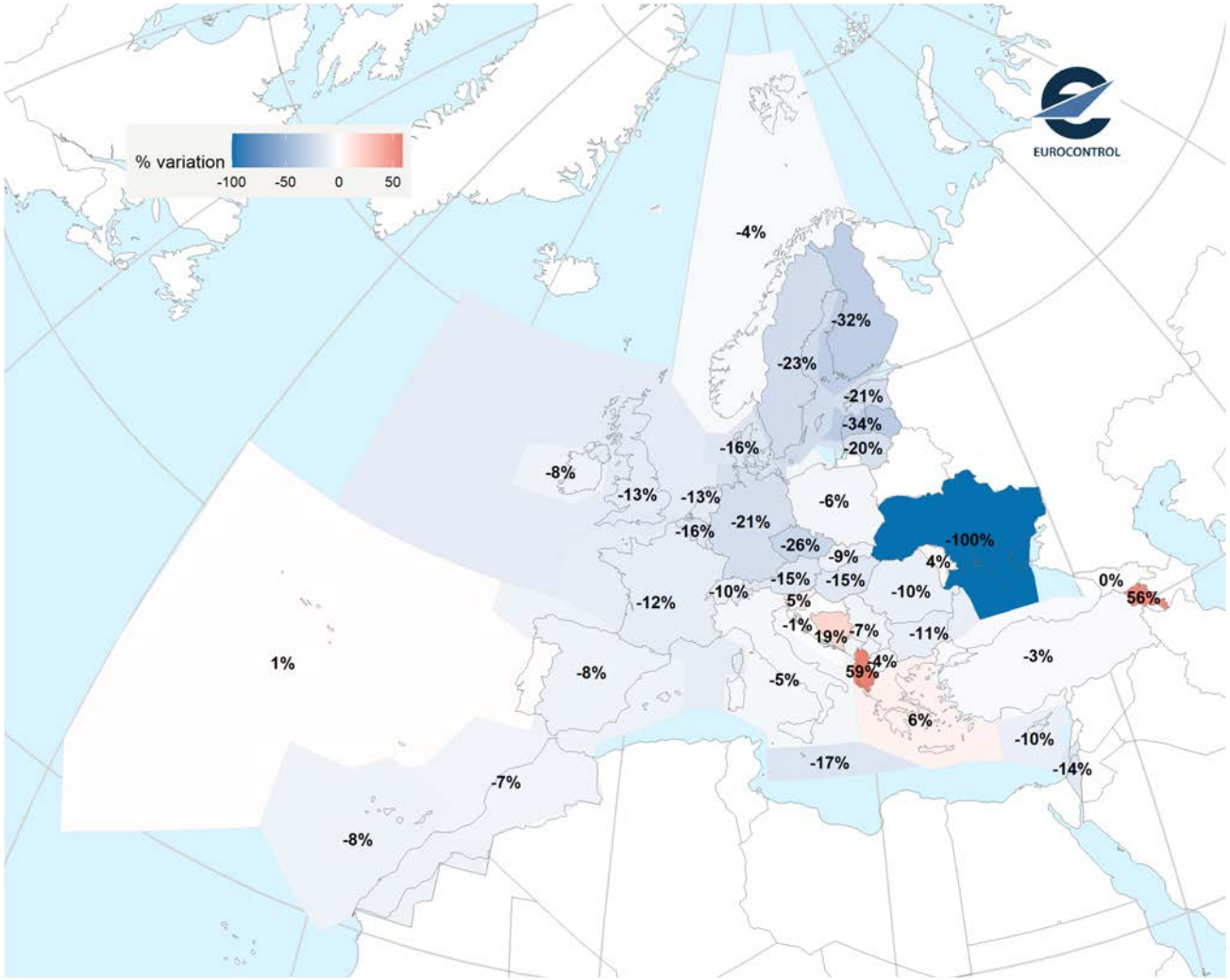
Increase for:

- **France** (+171 flights; +4%) mainly due to Air France, easyJet and Ryanair, as a rebound from the French ATC strike on 16 September.

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

State FIR daily % arrivals/departures variation vs 2019 on 2022-09-27

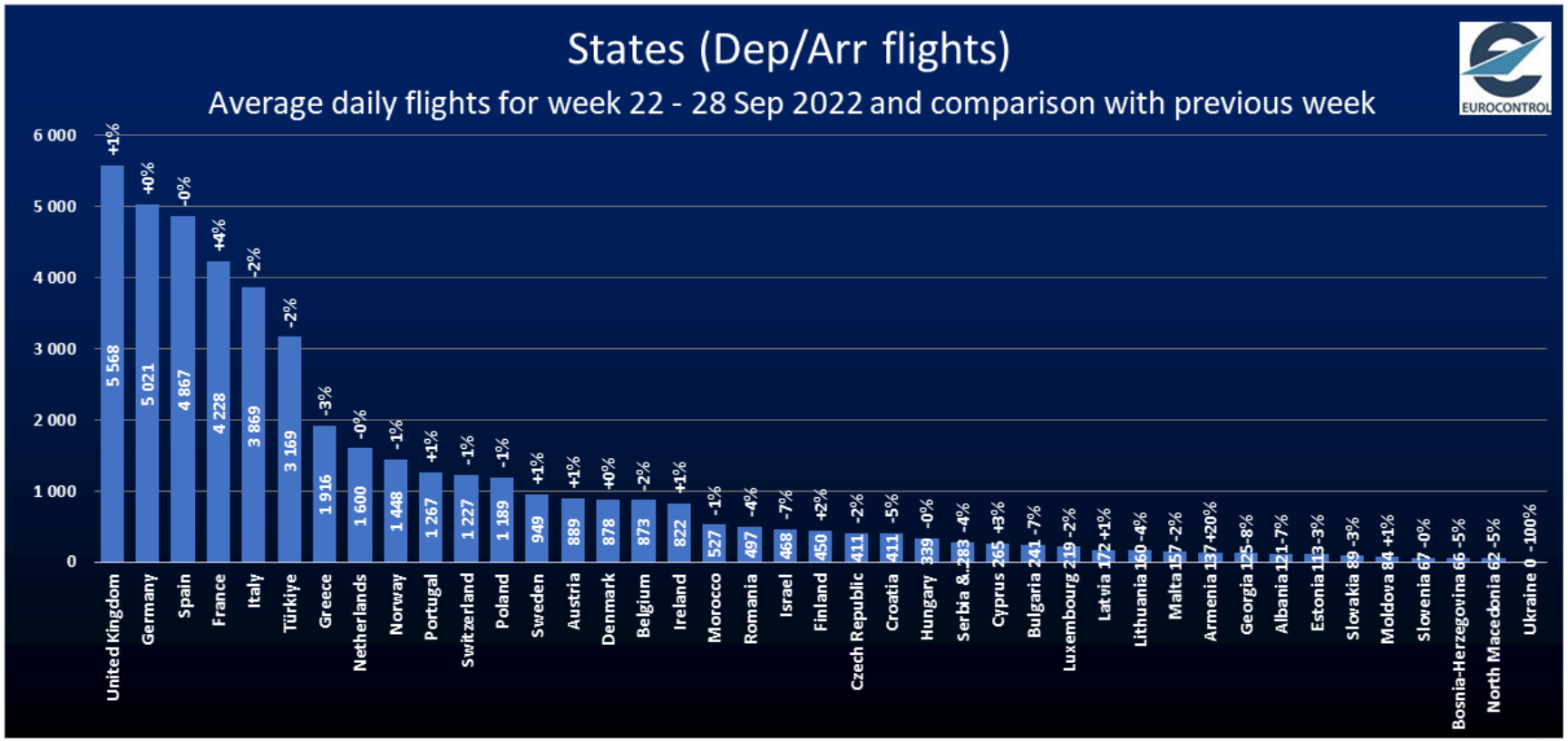
7-day average - FIRs at altitude FL200

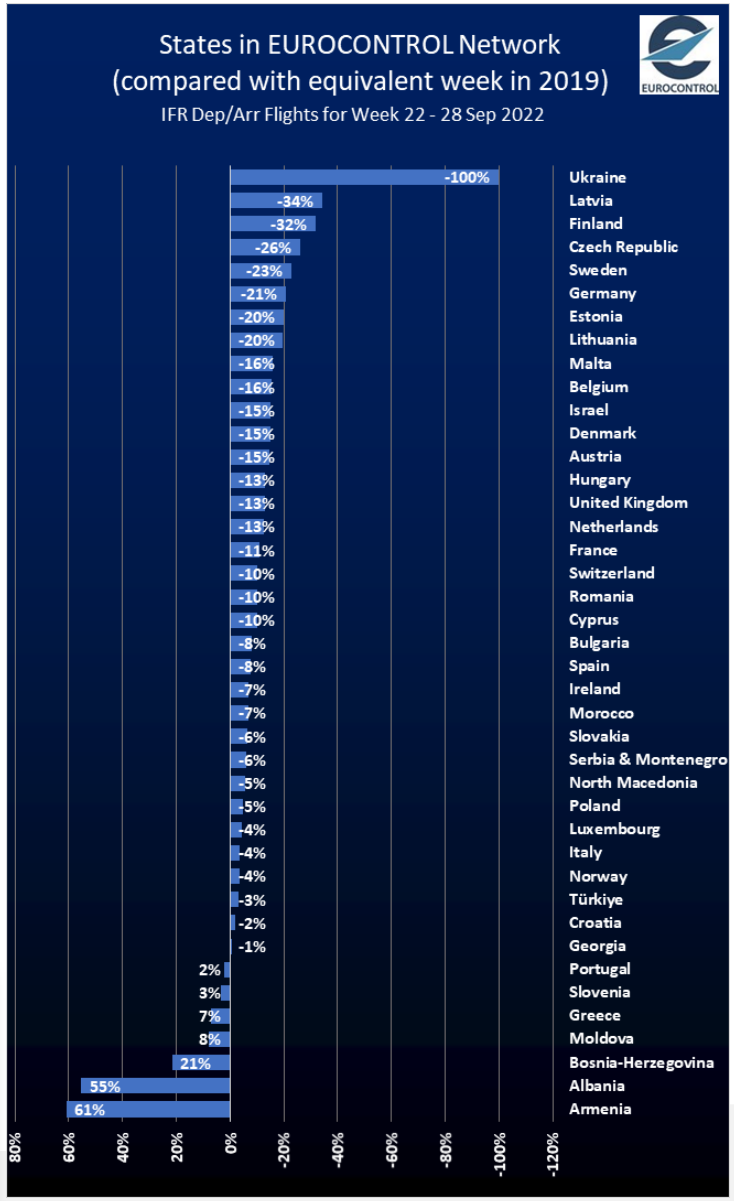


The designations employed and the presentation of the material on maps, videos and animations do not imply the expression of any opinion whatsoever on the part of EUROCONTROL concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries

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

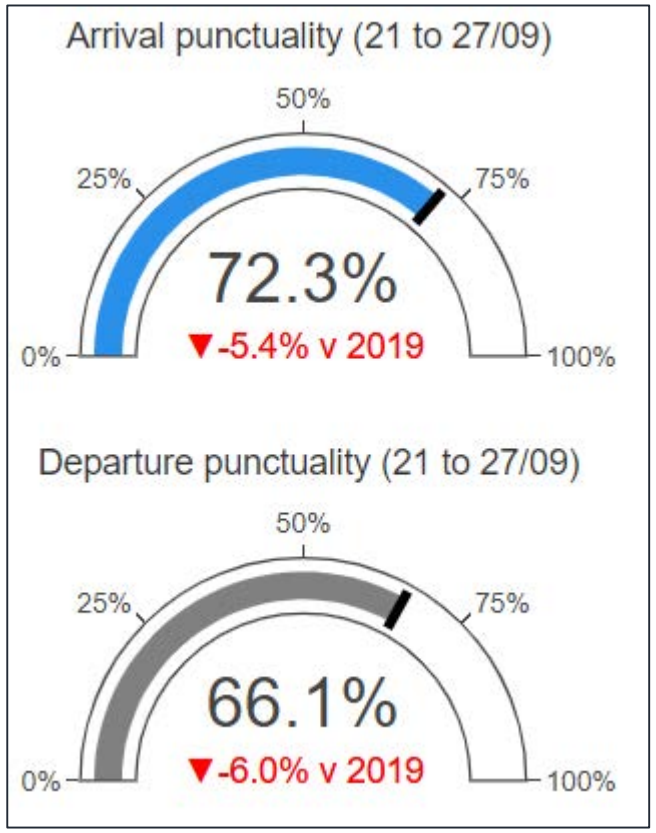
Top 40

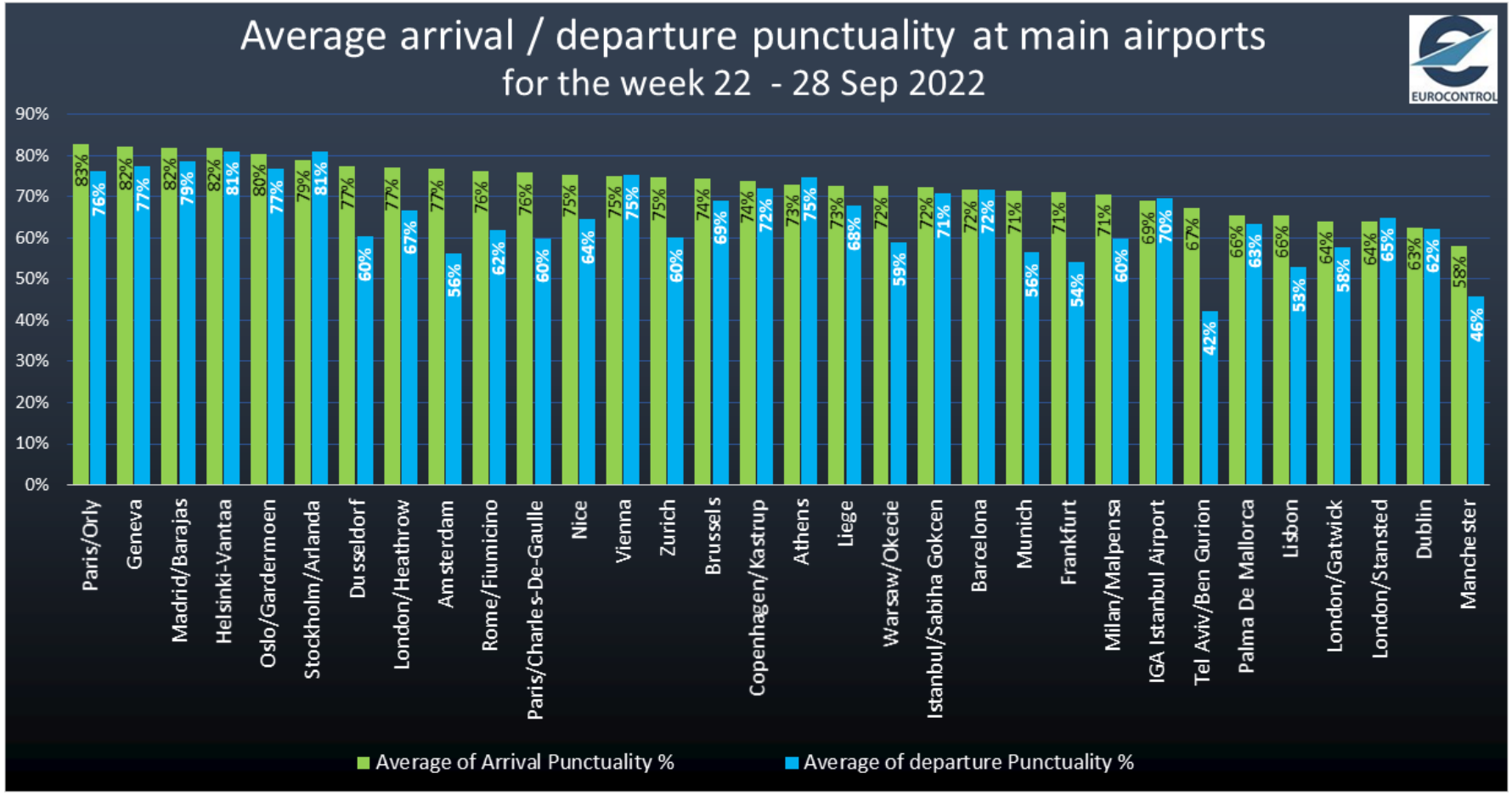




- Largest decreases in flights vs previous week for **Italy** (-2%), **Greece** (-3%), **Türkiye** (-2%), **Israel** (-7%), **Romania** (-4%) and **Belgium** (-2%).
- Highest increases for **France** (+4%), **UK** (+1%), **Armenia** (+20%) and **Sweden** (+1%).
- Traffic levels ranging from -100% (**Ukraine**) to +61% (**Armenia**), compared to 2019.

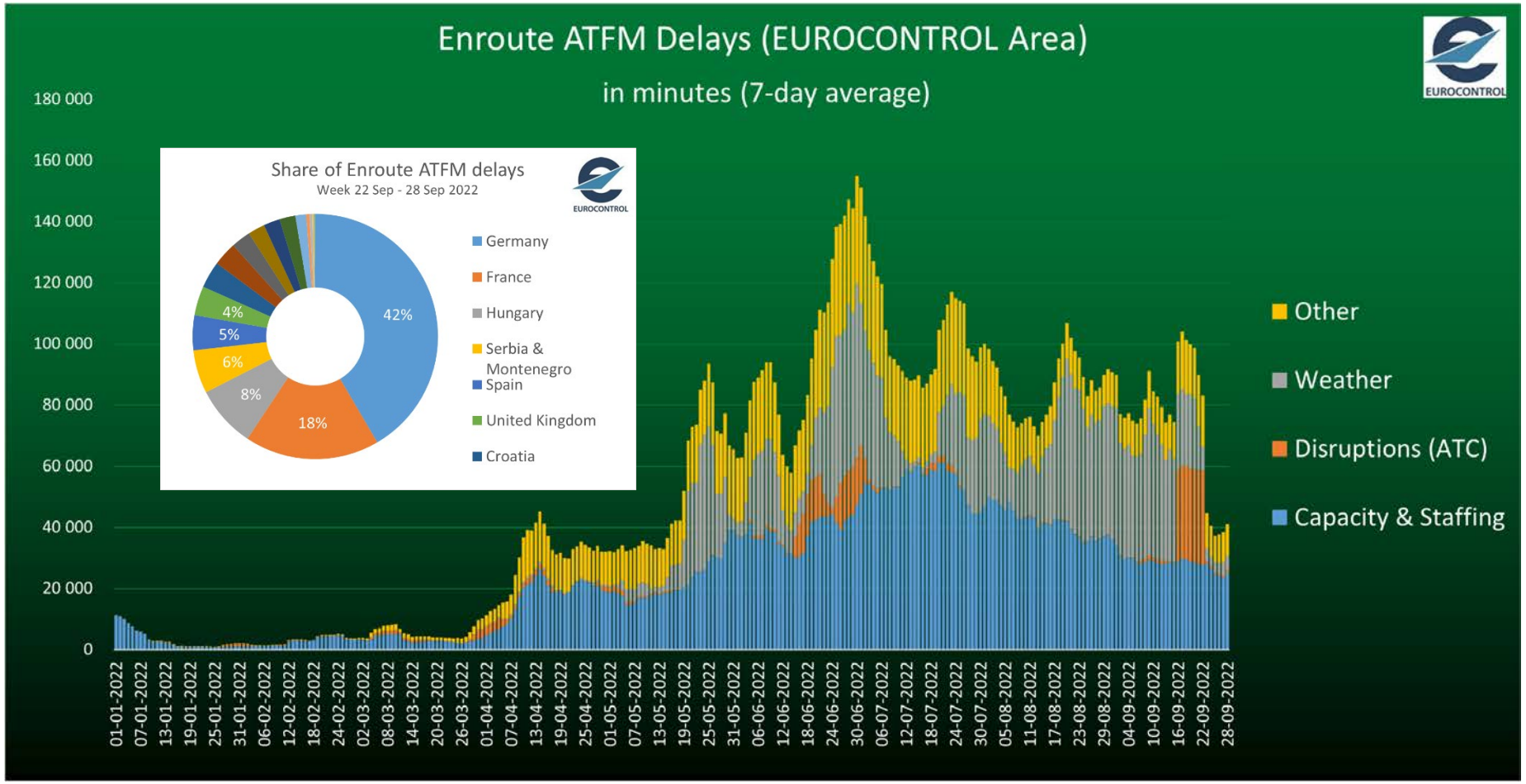
ARRIVAL & DEPARTURE PUNCTUALITY (AT TOP AIRPORTS FOR THE LAST WEEK)





✈ 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

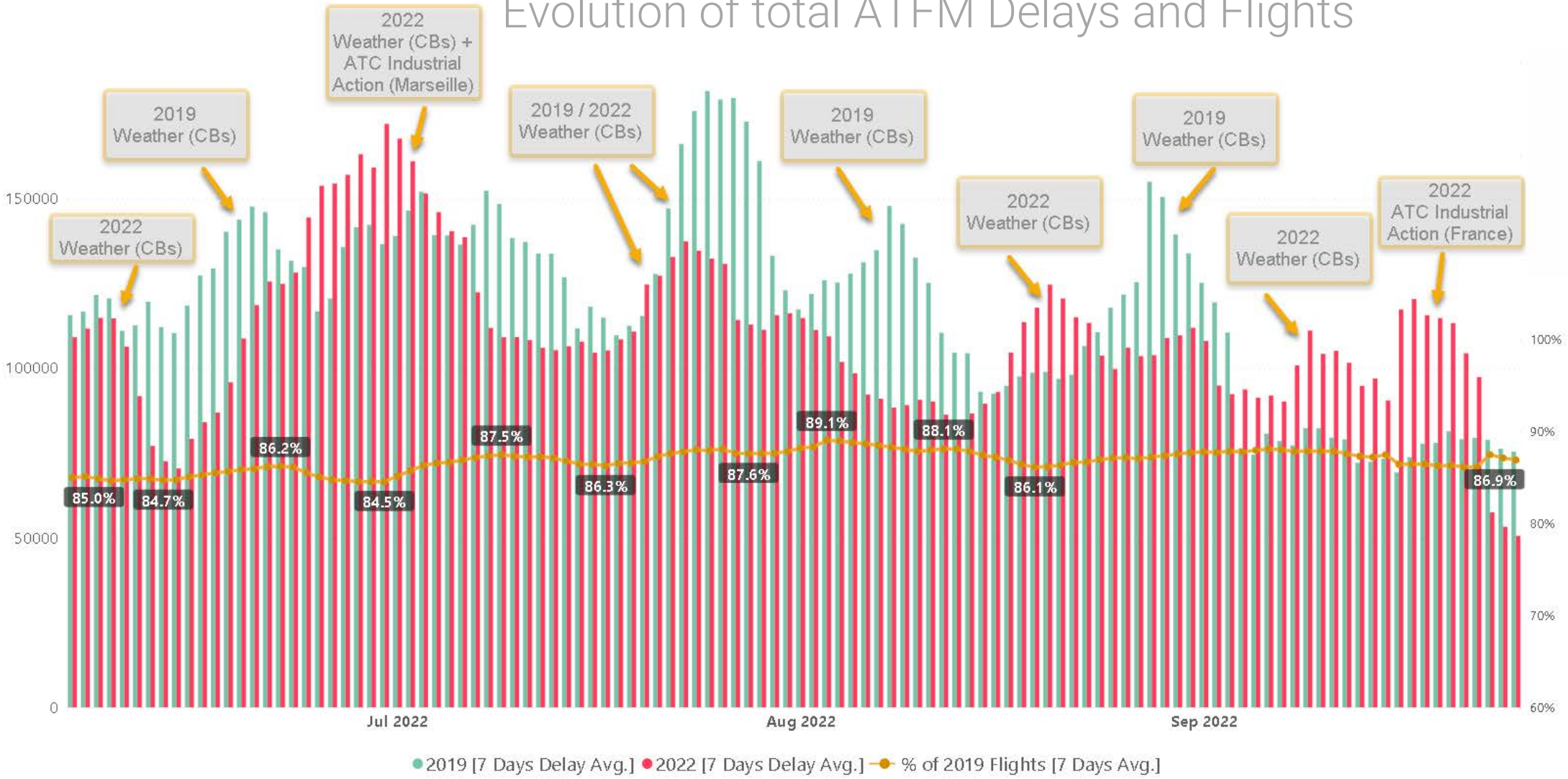


- Average en-route ATFM delays over the last week (22-28 Sept.) have been significantly below the levels of the week before. They are below 2019 levels too (see next slide).
- Previous week (15-21 Sept.) was affected by an ATC strike in France (16 Sept.) as well as Weather disruptions in the Canaries, which hindered the weekly average.
- Major contributors over the last 7 days: **Germany** (42% of all en-route ATFM delays), **France** (18%), **Hungary** (8%), **Serbia & Montenegro** (6%), **Spain** (5%) and **UK** (4%).

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

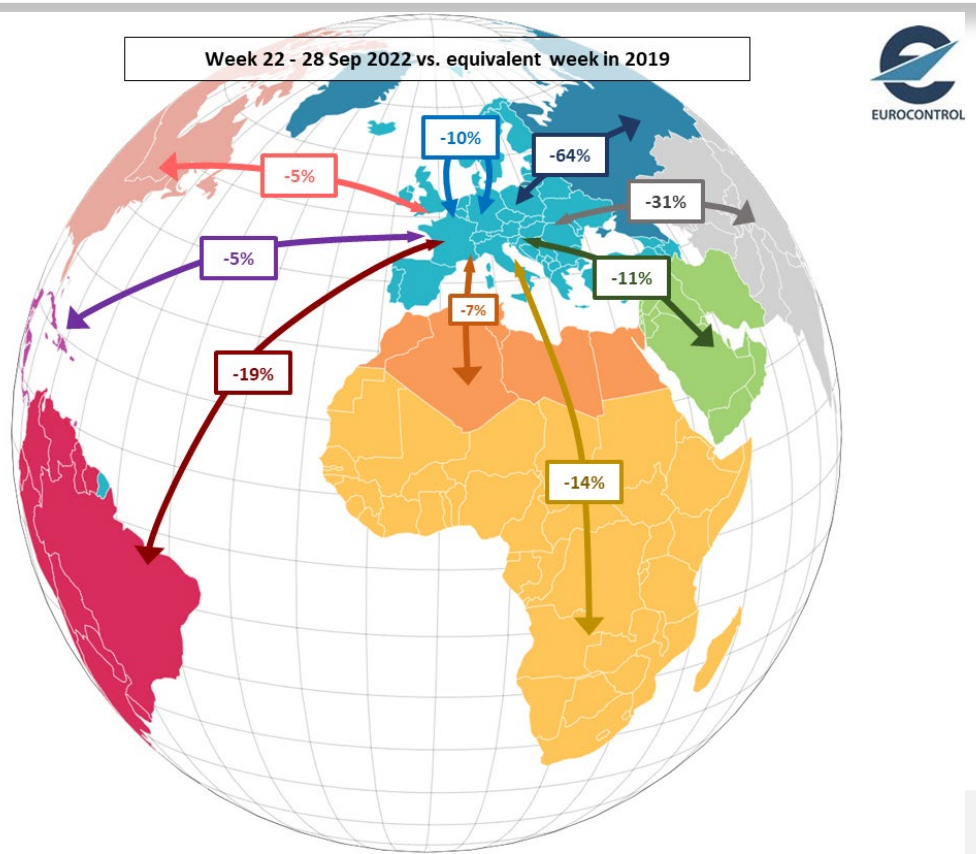
2019 and 2022 (7-day average)

Evolution of total ATFM Delays and Flights



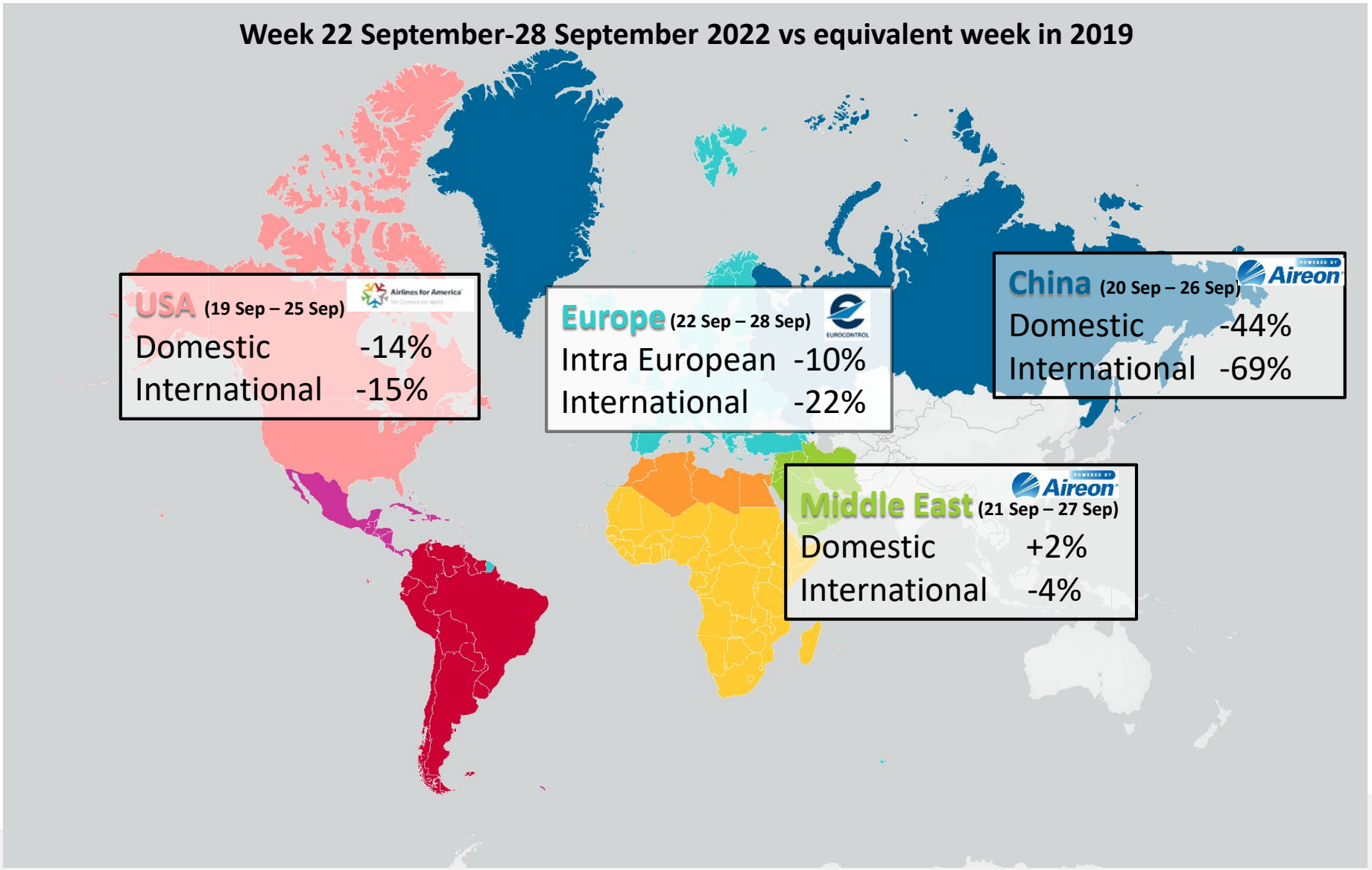
TRAFFIC FLOWS (AVERAGE DAILY DEPARTURE/ARRIVAL FLIGHTS FOR THE LAST WEEK)

- The **main** traffic **flow** is the **intra-Europe** flow with **23,606 flights** on average for the most recent week, stable over the previous week.
- Flows between **Europe** and Other Europe (incl. **Russia**) are at -64% compared to 2019.
- Asia/Pacific: Flows between **Europe** and **Asia/Pacific** are at -31% compared to 2019. Domestic flows started to recover in China during Q3 but new lockdowns hit the traffic recovery (see next slide).
- **Intra-Europe** flights are 10% below 2019 levels while **intercontinental** flows are at -22%.



REGION (Average daily flights)	Week 15/09/2022 - 21/09/2022	Week 22/09/2022 - 28/09/2022	%	vs. 2019
Intra-Europe	**23 661**	**23 606**	**-0%**	**-10%**
Europe<->Asia/Pacific	570	570	+0%	-31%
Europe<->Mid-Atlantic	143	143	-0%	-5%
Europe<->Middle-East	1 348	1 329	-1%	-11%
Europe<->North Atlantic	1 333	1 324	-1%	-5%
Europe<->North-Africa	996	982	-1%	-7%
Europe<->Other Europe	396	445	+12%	-64%
Europe<->South-Atlantic	156	156	-0%	-19%
Europe<->Southern Africa	275	264	-4%	-14%
Non Intra-Europe	**5 217**	**5 213**	**-0%**	**-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 22 - 28 Sep 2022				
	Country-Pair	Avg daily flights	Δ vs prev. week	% vs prev. week	% vs 2019
→	Spain <-> Spain	1 202	-64	-5%	-6%
↗	France <-> France	1 012	+46	+5%	-16%
↘	Italy <-> Italy	943	-29	-3%	+7%
↗	Spain <-> United Kingdom	871	+11	+1%	-6%
↗	United Kingdom <-> United Kingdo	855	+39	+5%	-20%
↘	Norway <-> Norway	853	-15	-2%	+4%
→	Türkiye <-> Türkiye	762	-25	-3%	-18%
→	Germany <-> Germany	655	+13	+2%	-34%
→	Germany <-> Spain	574	+13	+2%	-12%
↗	Germany <-> Türkiye	401	-4	-1%	-5%

Seven of the top 10 flows are domestic.

- **Spain-Spain** is the country-pair with the highest number of dep/arr flights (1,202) followed by **France-France** (1,012), **Italy-Italy** (943), **Spain-UK** (871), **UK-UK** (855), **Norway-Norway** (853) and **Türkiye-Türkiye** (762).
- France-France, Spain-UK, UK-UK and Germany-Türkiye increased their ranking while Italy-Italy and Norway-Norway decreased.

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

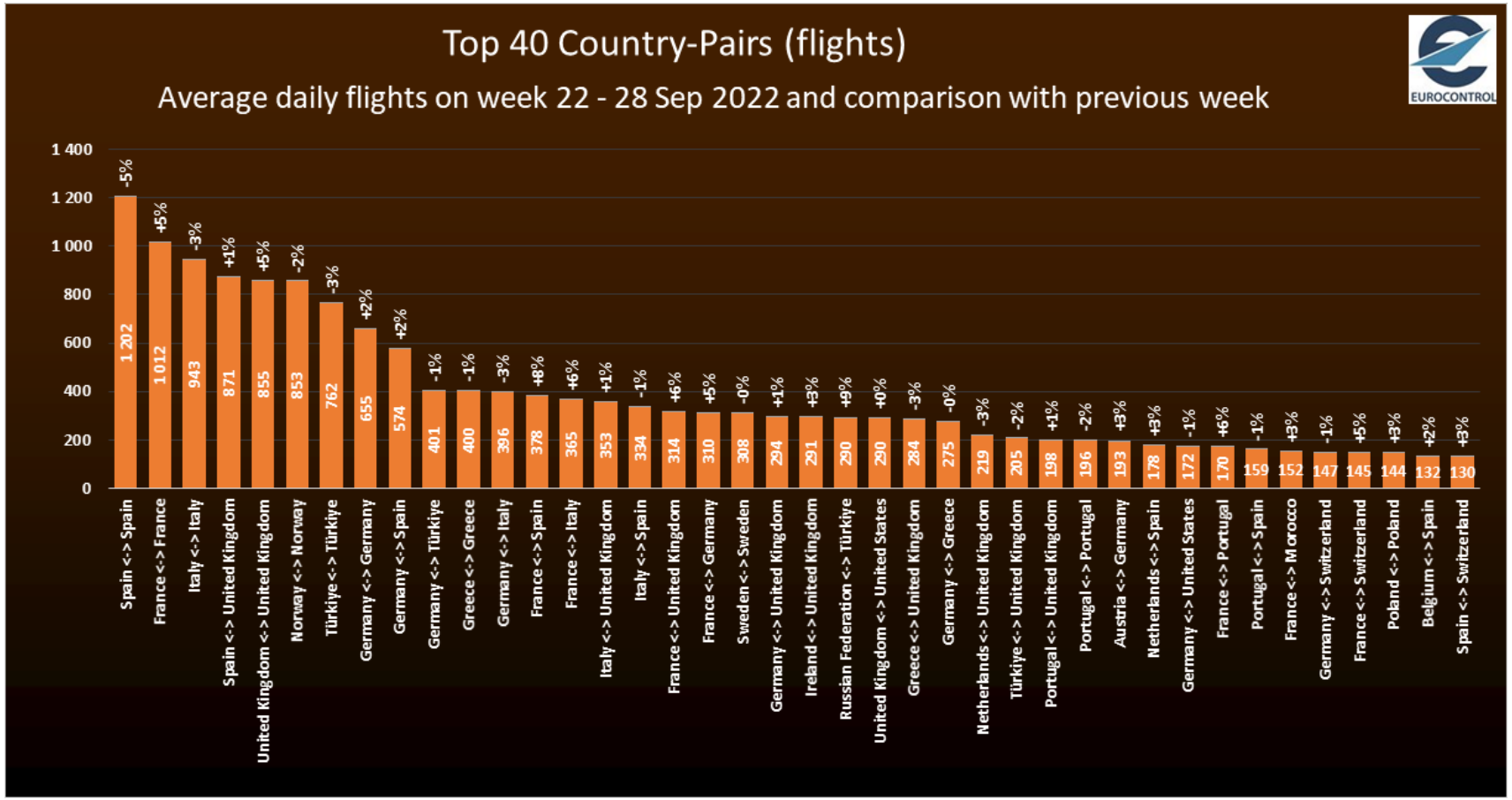
- **Spain-Spain** (-64 flights; -5%) mainly due to Binter Canarias, Canarias Airlines and Air Nostrum (storm in the Canaries).
- **Italy-Italy** (-29 flights; -3%) mainly due to light AOs, Volotea and Ryanair.
- **Türkiye-Türkiye** (-25 flights, -3%) mainly due to Turkish Airlines, light AOs and Pegasus.

Some increases for:

- **France-France** (+46 flights; +5%) mainly a side effect of ATC French strike on 16 September.
- **UK-UK** (+39 flights; +5%) mainly due to light AOs, Loganair and British Airways.

COUNTRY PAIRS (AVERAGE DAILY FLIGHTS FOR THE LAST WEEK)

Top 40



- Largest decreases in flights vs previous week for **Spain-Spain** (-5%, explained by adverse weather in the Canaries), **Italy-Italy** (-3%), **Türkiye-Türkiye** (-3%), **Norway-Norway** (-2%), **Germany-Italy** (-3%) and **Greece-UK** (-3%).
- Highest increases in flights vs previous week for **France-France** (+5%, explained a side effect of the ATC disruption in France the week before), **UK-UK** (+5%), **France-Spain** (+8%) and **Russia-Türkiye** (+9%).

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

Top 10

Rank evolution over prev. Week	Top 10 Airports on week 22 Sep - 28 Sep 2022				
	Airport	Average Daily Dep/Arr Flights	Δ over prev. week	% over prev. week	% vs 2019
→	IGA Istanbul Airport	1 293	-11	-1%	+4%
→	Amsterdam	1 269	-18	-1%	-16%
→	Paris/Charles-De-Gaulle	1 232	+66	+6%	-16%
→	Frankfurt	1 159	+9	+1%	-25%
→	London/Heathrow	1 127	+36	+3%	-13%
→	Madrid/Barajas	1 043	+9	+1%	-16%
→	Munich	942	+11	+1%	-25%
→	Barcelona	906	+18	+2%	-15%
→	Palma De Mallorca	846	+4	+0%	+4%
→	Antalya	801	-18	-2%	-5%

- **IGA Istanbul** is the airport with the highest number of dep/arr flights (1,293) followed by **Amsterdam** (1,269), **Paris CDG** (1,232), **Frankfurt** (1,159) and **London Heathrow** (1,127).
- **IGA Istanbul** is the busiest airport in Europe, recording more flights than in 2019 over the same week (+4%). **Palma de Mallorca** also managed to exceed 2019 levels too (+4%).

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

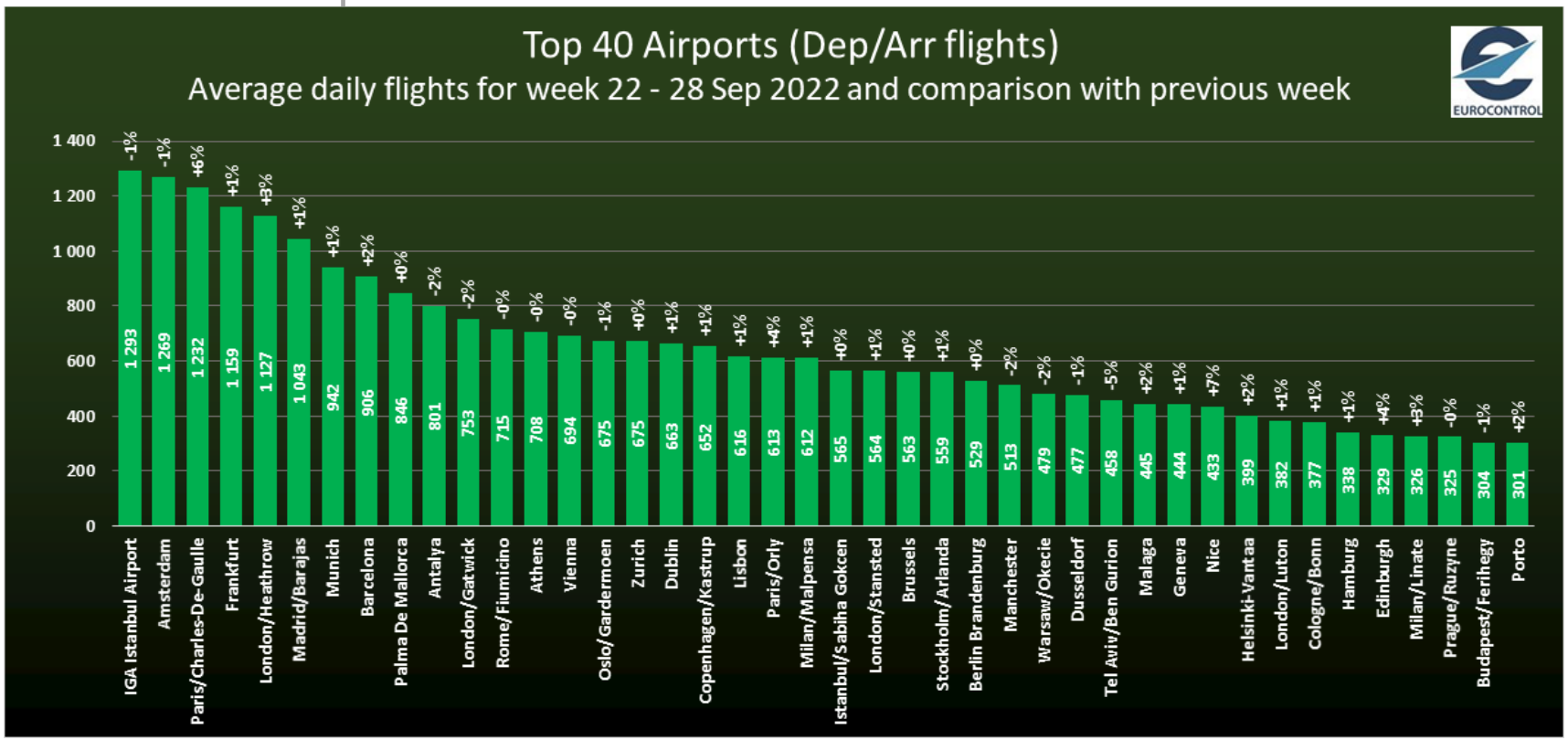
- **Paris CDG** (+66 flights; +6%) mainly due to Air France, easyJet and Vueling. Domestic flows and flows with Italy, Germany and Spain.
- **London Heathrow** (+36 flights; +3%) mainly due to British Airways, United Airlines and Aer Lingus. Flows with UK, Italy and Spain.
- **Barcelona** (+18 flights; +2%) mainly due to easyJet, Ryanair and Vueling . Flows with France, Germany and UK.

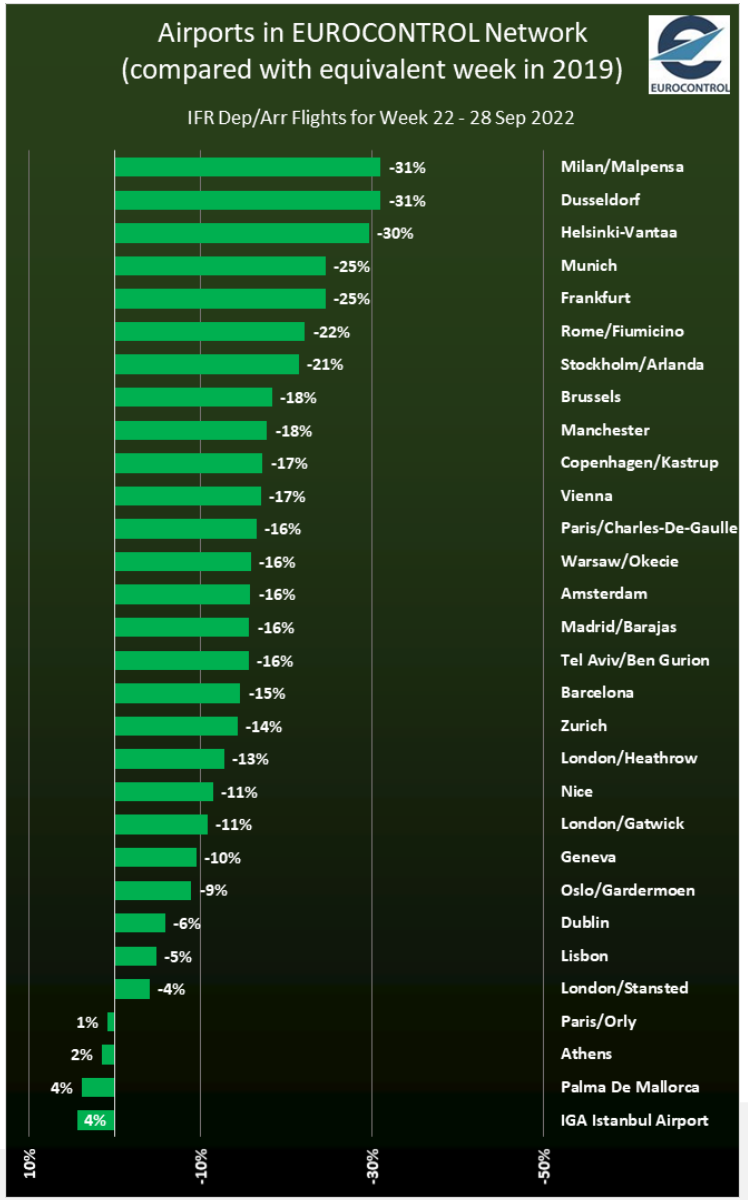
Decreases for:

- **Amsterdam** (-18 flights; -1%) mainly due to EasyJet and KLM. Flows with UK, Italy and Switzerland.

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

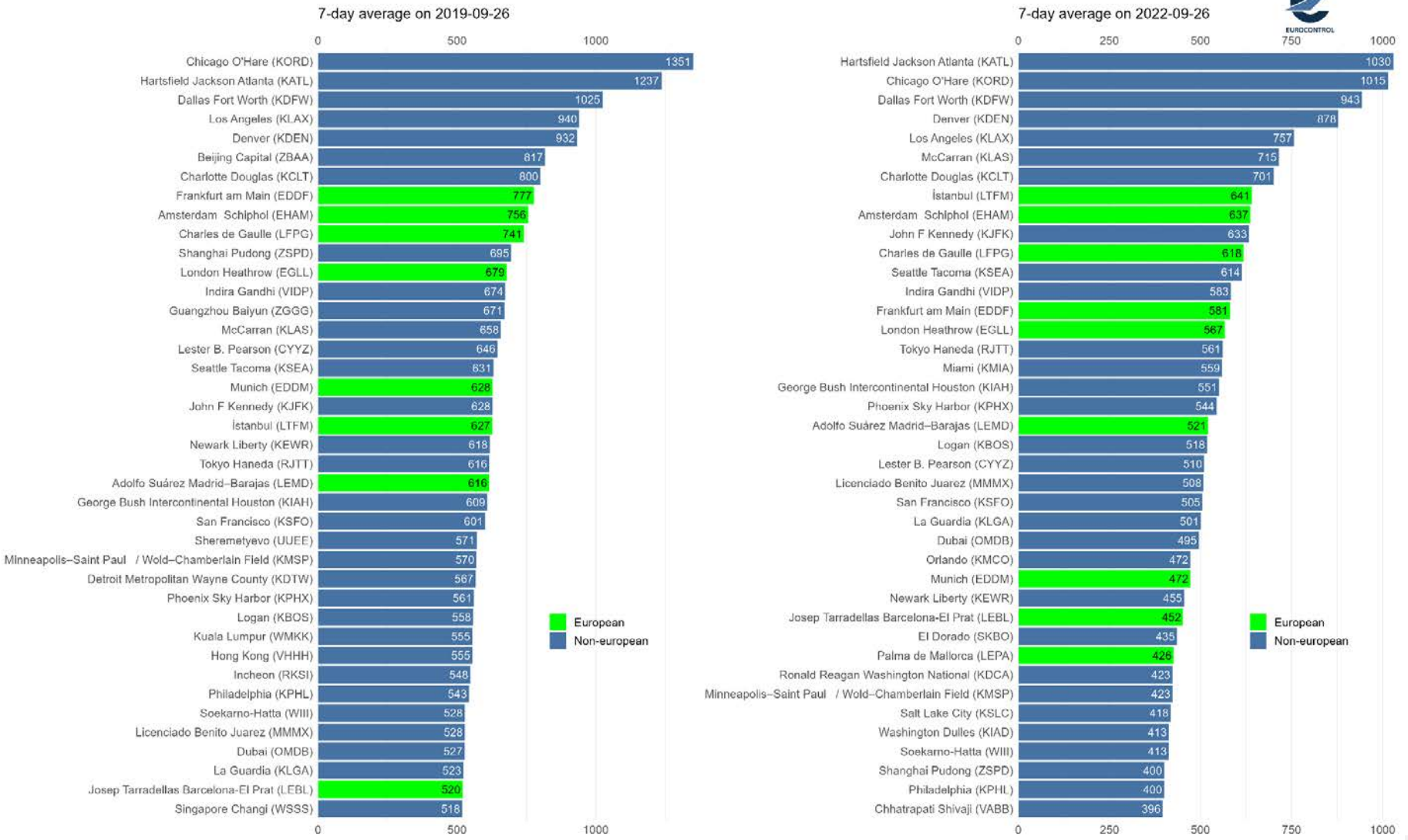
Top 40





- Highest increases in flights vs the previous week for **Paris CDG** (+6%), **London Heathrow** (+3%), **Nice** (+7%), **Paris Orly** (+4%) and **Barcelona** (+2%).
- Largest decreases for **Tel Aviv** (-5%), **Antalya** (-2%) and **Amsterdam** (-1%).
- Traffic levels ranging from -31% (Milan) to +4% (IGA Istanbul) compared to 2019.

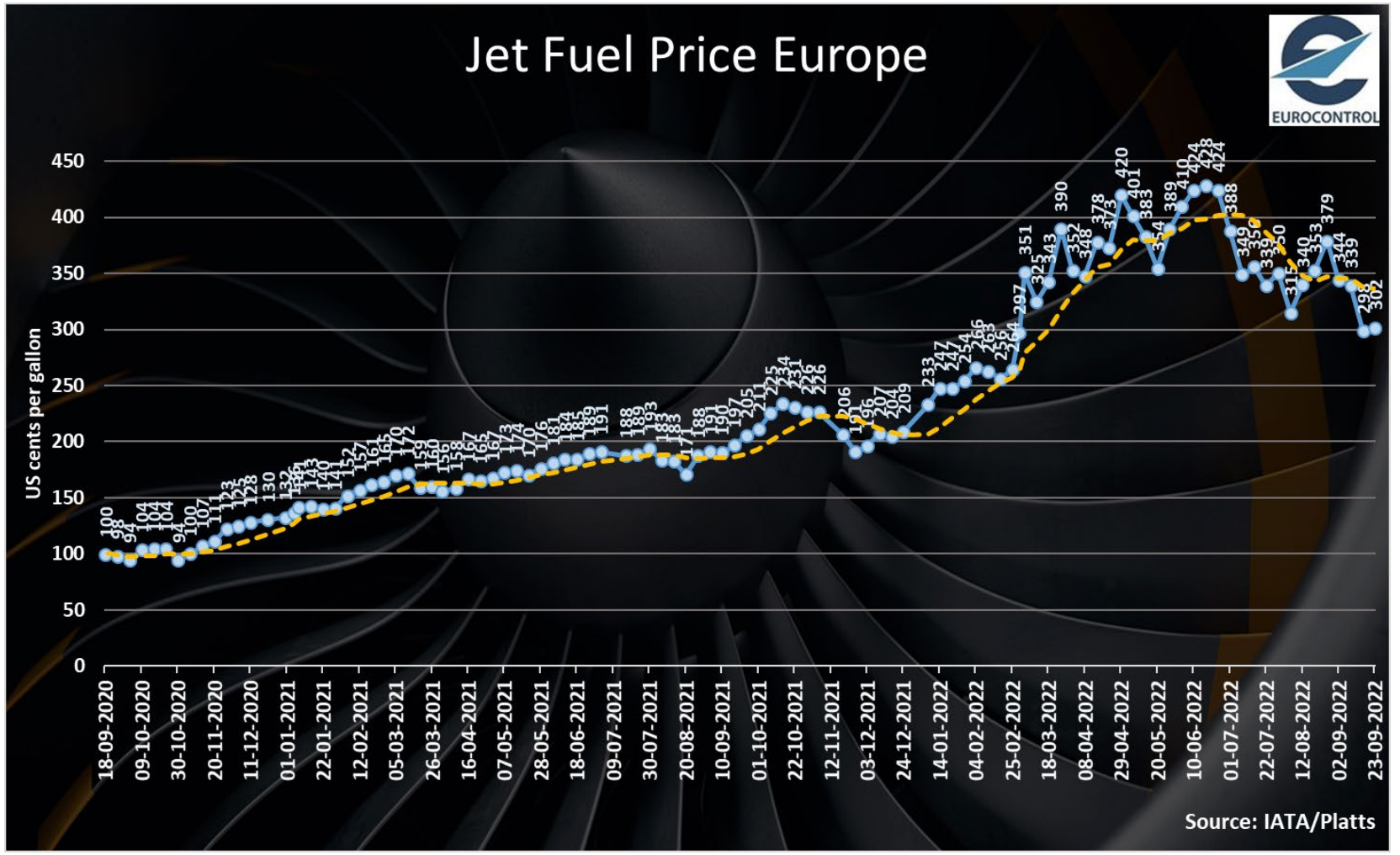
TOP 40 GLOBAL AIRPORTS (AVERAGE DAILY DEPARTURE FLIGHTS FOR THE LAST WEEK)



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

- **9 European airports** are ranked in the **Top 40** global airports (vs 8 in 2019)
- **Two European airports** are in the Top 10: IGA Istanbul (8th) and Amsterdam (9th).
- Paris CDG, Frankfurt and London Heathrow are in the **Top 15**.
- Nine of the Top 15 global airports are currently **based** in **the US.**
- The **first Asian airport in 2022** is **New Delhi** (13th).

FUEL PRICES



- **Jet fuel prices** decreased to 302 cts/gallon on 23 September and averaged 321 cts/gallon in September (-7% vs August; +64% vs September 2021; +65% vs September 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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