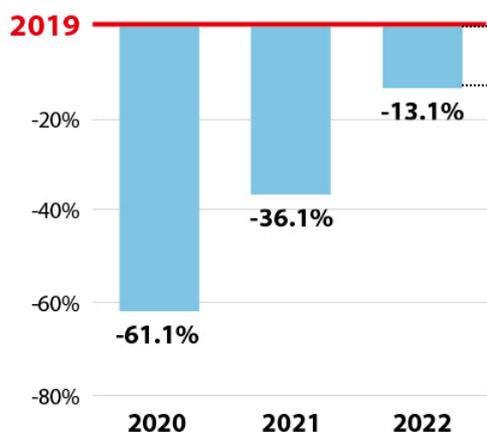# EUROCONTROL Data Snapshot
Road to recovery – what flights are still missing compared to 2019 traffic levels?
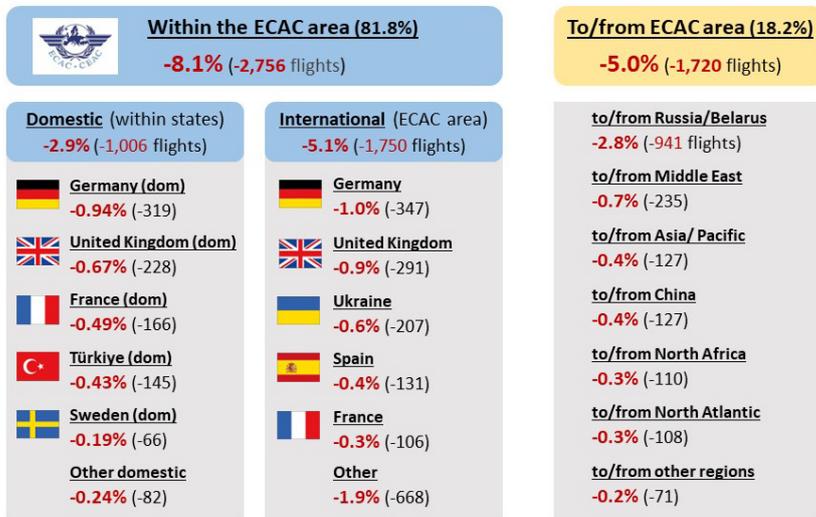
22 November 2022

Flights in Europe in Summer (Jun-Sep) compared to 2019

2019
-20%
-40%
-60%
-80%

-61.1% (2020)
-36.1% (2021)
-13.1% (2022)

Average daily flights in Summer 2022 compared to 2019
-13,1% vs 2019 (-4,476 flights)

Within the ECAC area (81.8%)
-8.1% (-2,756 flights)

To/from ECAC area (18.2%)
-5.0% (-1,720 flights)

Domestic (within states)
-2.9% (-1,006 flights)

Germany (dom)	**-0.94%** (-319)
United Kingdom (dom)	**-0.67%** (-228)
France (dom)	**-0.49%** (-166)
Türkiye (dom)	**-0.43%** (-145)
Sweden (dom)	**-0.19%** (-66)
Other domestic	**-0.24%** (-82)

International (ECAC area)
-5.1% (-1,750 flights)

Germany	**-1.0%** (-347)
United Kingdom	**-0.9%** (-291)
Ukraine	**-0.6%** (-207)
Spain	**-0.4%** (-131)
France	**-0.3%** (-106)
Other	**-1.9%** (-668)

to/from Russia/Belarus	**-2.8%** (-941 flights)
to/from Middle East	**-0.7%** (-235)
to/from Asia/ Pacific	**-0.4%** (-127)
to/from China	**-0.4%** (-127)
to/from North Africa	**-0.3%** (-110)
to/from North Atlantic	**-0.3%** (-108)
to/from other regions	**-0.2%** (-71)

Traffic has this year bounced back, despite the initial setback of Omicron, and the profound shock caused by Russia's invasion of Ukraine in February 2022 and the unfolding economic and energy crisis in Europe. By the start of summer 2022, traffic across the network, and within Europe, had recovered to around 80-90% of 2019 levels, and has remained in this band ever since – representing a huge advance on previous years. But where exactly are the missing 10+%?

The analysis in this data snapshot compares summer (Jun-Sep) 2022 to the same period in 2019 for flights arriving at or departing from the European Civil Aviation Conference (ECAC) Member States. In summer 2022, 81.8% of the analysed flights operated within the ECAC area and 18.2% were services to or from the ECAC area.

Compared to summer 2019, there was still a traffic gap of 13.1% in 2022 which corresponds to 4,476 fewer daily flights in the network. Some 8.1% of the observed gap were due to fewer flights within the ECAC area with the remaining 5% due to fewer traffic to and from the ECAC area.

Domestic flights within each of the ECAC states accounted for -2.9% of the reduced flights versus summer 2019 of which Germany was the largest contributor (-0.94%). The reduction of international traffic within the ECAC area was accountable for 5.1% of the gap compared to 2019 with Germany, the UK and Ukraine being the main contributors.

The direct impact of the war in Ukraine and the subsequent airspace closures are also visible from the reduced traffic to/from Russia and Belarus which accounted for some 2.8% of the observed 13% gap between summer 2022 and 2019 – a figure over three times higher than the loss of flights to Asia/Pacific and China, where restrictions have been in place longer.

Technical Bits:

The analysis is based on flights departing from or arriving at European Civil Aviation Conference (ECAC) member states (44 States including 41 EUROCONTROL States). The geographical definitions used for the analysis are available for download from STATFOR.

SUPPORTING EUROPEAN AVIATION

Member States: Albania, Armenia, Austria, Belgium, Bosnia and Herzegovina, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Georgia, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Monaco, Montenegro, Netherlands, North Macedonia, Norway, Poland, Portugal, Republic of Moldova, Romania, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Türkiye, Ukraine, United Kingdom.

Comprehensive Agreement States: Israel, Morocco.