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Headlines (Week of 19 – 25 January 2023)

- The **network** recorded **21,431 daily flights on average** over the past week (stable on previous week), +33% vs 2022 and **84% of 2019 levels**.
- Network traffic (flights) in line with the base EUROCONTROL Traffic Scenario: 86% for January vs 2019.
- Overall, **flight levels** are **stable** compared to the previous week.
- Ryanair was the busiest Aircraft Operator with 2,177 flights per day on average (+78% vs 2022), followed by Turkish Airlines (1,303; +64%), Lufthansa (885; +33%), Air France (835; +32%), easyJet (754; +59%), British Airways (675; +91%) and Wizz Air (667; +85%).
- **IGA Istanbul** remains the busiest airport within the network (1,242 flights) and is ranked 9 globally.
- Arrival punctuality (within 15 min.) is ~76% while departure punctuality is ~72%, both below 2019 levels.
- As is normal in winter, **ATFM delays are relatively low**, although they did slightly increase, mainly due to ATC disruption (industrial action in France on 19 January).
- Jet fuel prices increased to 334 cts/gallon on 20 January 2023 (+16% since early January).
- **Economic growth** in the **EU** is expected to **stagnate** in **2023, a**fter recording a growth of 3.4% in 2022.



Traffic Situation

Average daily flights (including overflights)

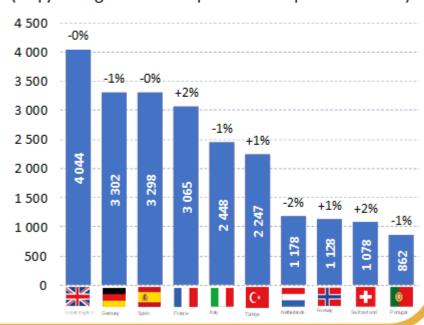
On week 19 - 25 Jan 2023

+33% vs equivaler week in 202

84% of 2019

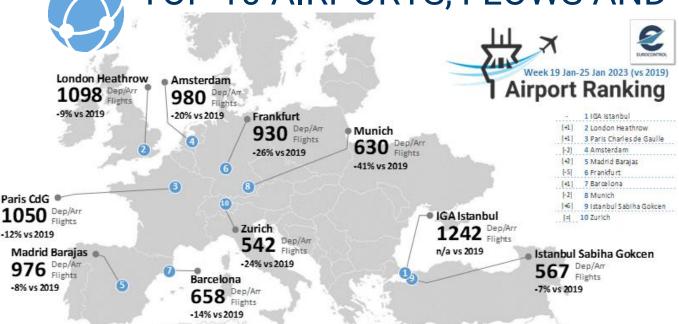
Top 10 Busiest States

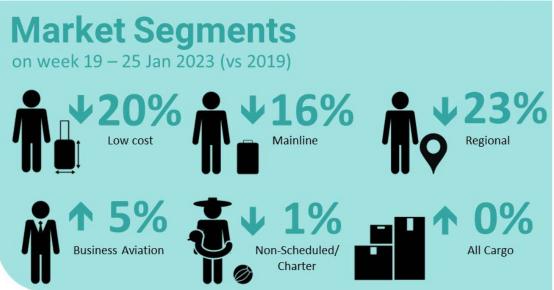
on week 19 - 25 Jan 2023 (avg daily flights)
(Dep/Arr flights and comparison with previous week)











Traffic Flow

Average daily flights on week of 19 - 25 Jan 2023

	Flights	vs prev week	vs 2022	vs 2019
Intra-European	16,355	+0%	+33%	-17%
Intercontinental	4,400	-2%	+36%	-16%

Route charges

Jan-Dec 2022 Amount billed:

€ 7,604 million

vs. Jan-Dec 2019

Source: EUROCONTROL

Economics

20 Jan. 2023 Avg Fuel price:

1334 cents/gallon

vs. 287 cents/gallon on 6 Jan. 2023

Source: IATA/Platts

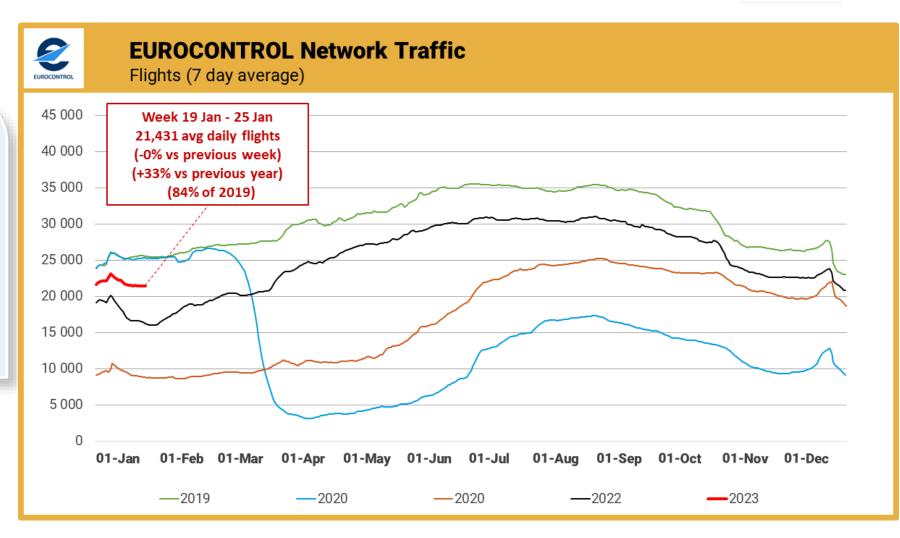


OVERALL TRAFFIC SITUATION AT NETWORK LEVEL



On week 19 – 25 January:

- **21,431** average daily flights.
- **X Stable** on previous week.
- * +33% vs 2022.
- *** 84%** of 2019.

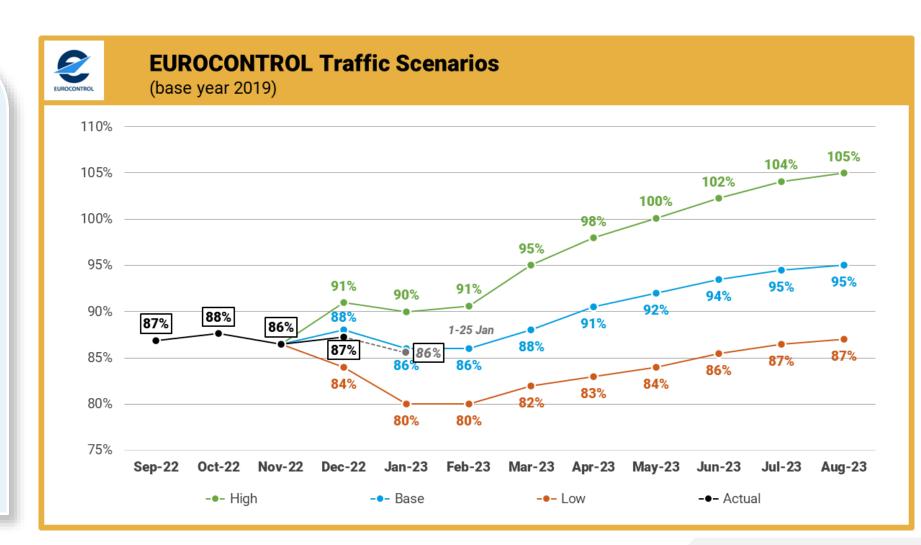




OVERALL SITUATION COMPARED TO THE EUROCONTROL TRAFFIC SCENARIOS



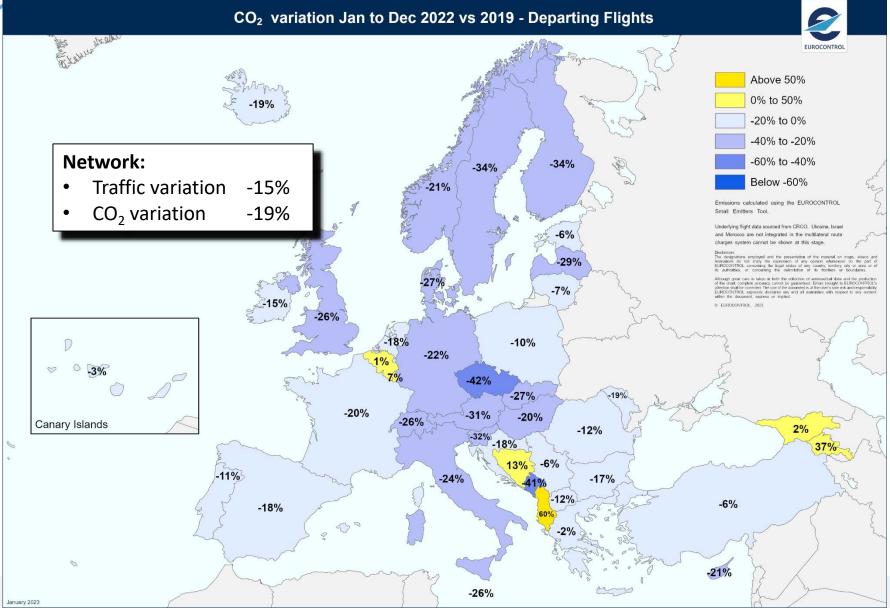
- ★ The last EUROCONTROL Traffic Scenarios were published on 16 December 2022.
- ★ For the first 25 days on the month, traffic is currently in line with the base scenario, at 86% of 2019 levels.
- ★ On a year-to-date basis, traffic is currently at +24% vs 2022.





AVIATION SUSTAINABILITY







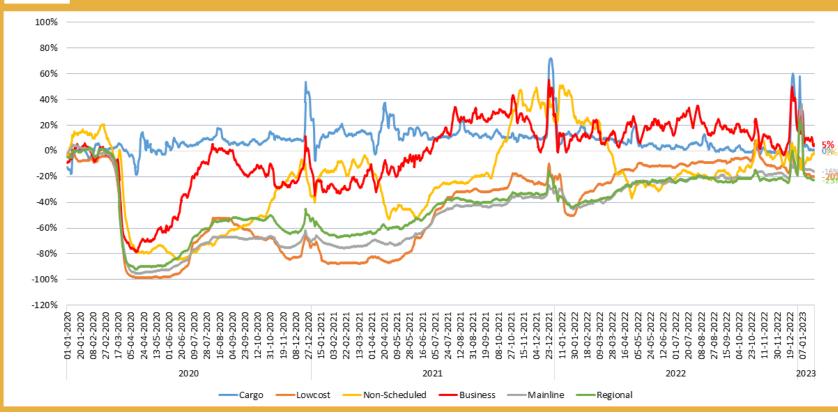
MARKET SEGMENTS





Market segments in the EUROCONTROL Network

(7-day average flights compared with 2019)



Until the 25th of January 2023, compared to **2019**:

- **★ Business Aviation** (+5%) and **All-cargo** (+0%) are the only two segments recording traffic constantly above 2019 levels.
- ** Charter (-2%) was recording more traffic than in 2019 early 2022, then stepped back with the start of the war in Ukraine and is now close to 2019 levels.
- **★ Low-Cost** (-20%) has been **recovering steadily** in 2022 but are reducing constantly since the start of the winter schedules in October 2022.
- ★ Mainline and Regional (-16% and -23% respectively) have been recovering at a slower pace than low-cost.







Rank evolution	Top 10 Aircraft Operators - Week 19 - 25 Jan 2023								
over 1 week	Aircraft Operator	Average daily flights	vs	vs previous week			% vs 2022	% vs 2019	
→	Ryanair Group	2 177	77	-10	-0%	7	+78%	+14%	
→	Turkish Airlines	1 303	71	+23	+2%	71	+64%	+1%	
→	Lufthansa Airlines	885	7	-41	-4%	71	+33%	-37%	
→	Air France Group	835	7	-23	-3%	71	+32%	-23%	
→	easyJet Group	754	7	-30	-4%	7	+59%	-37%	
→	British Airways Group	675	3	-41	-6%	7	+91%	-15%	
→	Wizz Air Group	667	2	-10	-1%	7	+85%	+46%	
→	KLM Group	600	2	-14	-2%	71	+9%	-17%	
→	SAS Group	507	71	+13	+3%	7	+53%	-27%	
→	Vueling	433	3	-14	-3%	7	+100%	-5%	

- **X Ryanair** is the busiest Aircraft Operator with 2,177 flights per day on average over last week (+78% vs 2022), followed by **Turkish Airlines** (1,303; +64%), **Lufthansa** (885; +33%), **Air France** (835; +32%), **easyJet** (754; +59%), **British Airways** (675; +91%) and **Wizz Air** (667; +85%).
- ★ In this Top 10, three Aircraft Operators are above 2019 levels: Ryanair (+14%), Turkish Airlines (+1%) and Wizz Air (+46%).

Within the top 8, eight airlines posted decreases over the previous week:

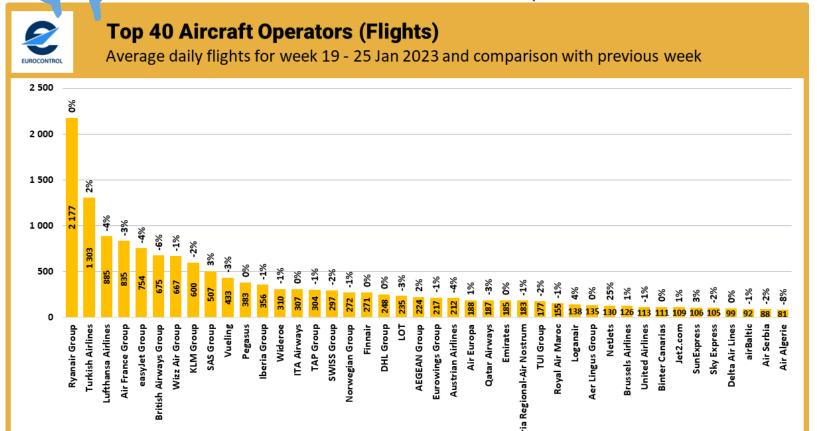
- ★ Lufthansa (-41 flights; -4%) mainly due to domestic flows, and flows between Germany and UK and Italy.
- **★ British Airways** (-41 flights; -6%) mainly due to flows between UK and Germany, UK, US and Switzerland.
- **★ easyJet** (-30 flights; -4%) mainly due to the flows Spain-UK and France-Portugal.
- ★ Air France (-23 flights; -3%) mainly due to domestic flows and flows between France and Germany.

Higher increases for:

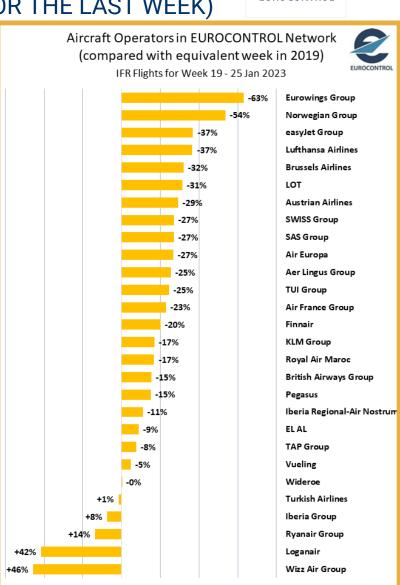
- **★ Turkish Airlines** (+23 flights; +2%) mainly due to domestic flows in Türkiye as well as flows between Türkiye and Saudi Arabia.
- **★ SAS** (+13 flights; +3%) mainly due to domestic flows in Norway and Sweden.



AIRCRAFT OPERATORS (AVERAGE DAILY FLIGHTS FOR THE LAST WEEK)



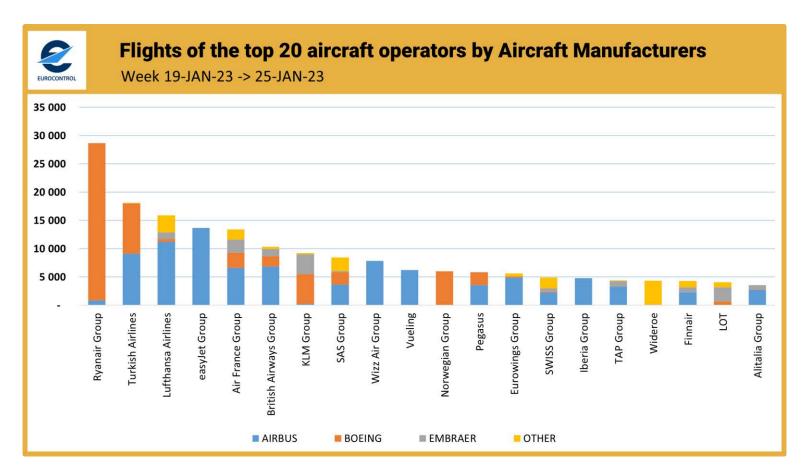
- ★ Highest decreases in flights compared to previous week for British Airways (-6%), Lufthansa Airlines (-4%), easyJet (-4%), Air France (-3%) and Vueling (-3%).
- **★** Largest increase for **Netjets** (+25%).
- **≭** Traffic levels ranging from -63% (Eurowings) to +46% (Wizz Air) vs 2019.

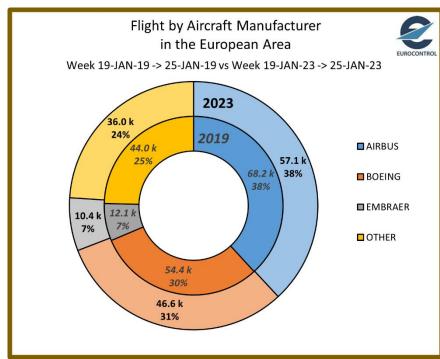




AIRCRAFT MANUFACTURERS (SHARE OF FLIGHTS FOR LAST WEEK)







- *At European level, 38% of all flights last week were operated by Airbus aircraft vs 31% by Boeing aircraft.
- ★ The situation varies for the top 20 aircraft operators. For these, Airbus's share was 50% while Boeing's share was 33%.



AIRCRAFT OPERATORS (AVERAGE DAILY FLIGHTS FOR THE LAST WEEK)



PERFORMANCE OF MAJOR CARGO CARRIERS

for the week 19 - 25 January 2023









PERFORMANCE OF MAJOR LOW-COST CARRIERS



for the week 19 - 25 January 2023













PERFORMANCE OF MAJOR LONG-HAUL/LEGACY CARRIERS



for the week 19 - 25 January 2023













PERFORMANCE OF MAJOR REGIONAL CARRIERS*



for the week 19 - 25 January 2023







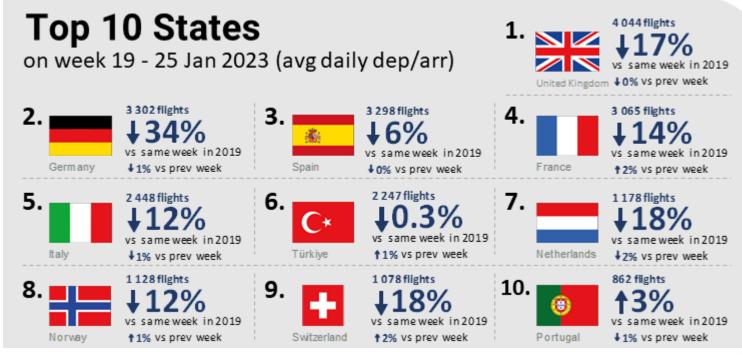












- **★UK** is the State with the highest number of dep/arr flights on average over last week (4,044; +69% vs 2022) followed by **Germany** (3,302; +27%), **Spain** (3,298; +34%), **France** (3,065; +29%), **Italy** (2,448; +42%) and **Türkiye** (2,247; +52%).
- **★** In this top 10, two States are above 2019 levels: Portugal (+3%) and **Türkiye** (-0%). Spain is close with -6%.

Within the top 10, six States posted flight decreases compared to previous week:

- **★ Germany** (-50 flights; -1%) mainly due to Lufthansa Airlines and BA to a lesser extent. and light AOs. On domestic flows, and flows with Spain, Türkiye and many others.
- **★ Netherlands** (-29 flights; -2%) mainly due to KLM, light AOs and easyJet. Flows with Spain and domestic.

Highest **increases** for:

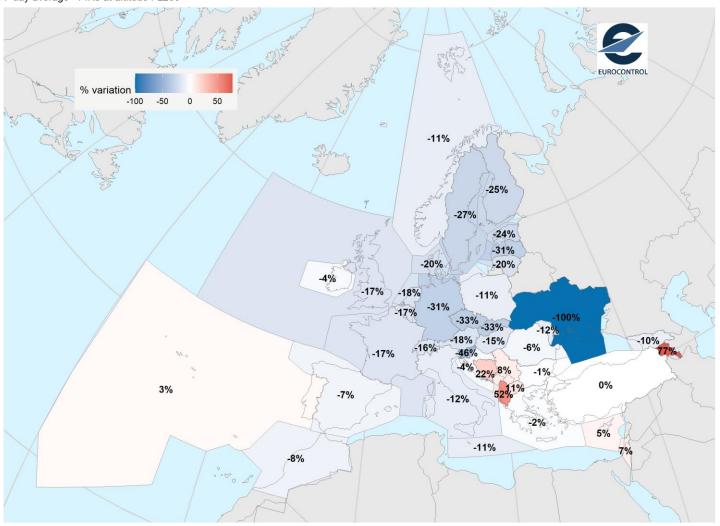
- **★France** (+51 flights; +2%) mainly due to light AOs and domestic flows;
- **★Türkiye** (+31; +1%) mainly due to Turkish Airlines. On domestic flows and flows with Saudi Arabia and UAE.



STATES (AVERAGE DAILY DEPARTURE/ARRIVAL FLIGHTS FOR THE LAST WEEK) State FIR daily % arrivals/departures variation vs 2019 on 2023-01-23



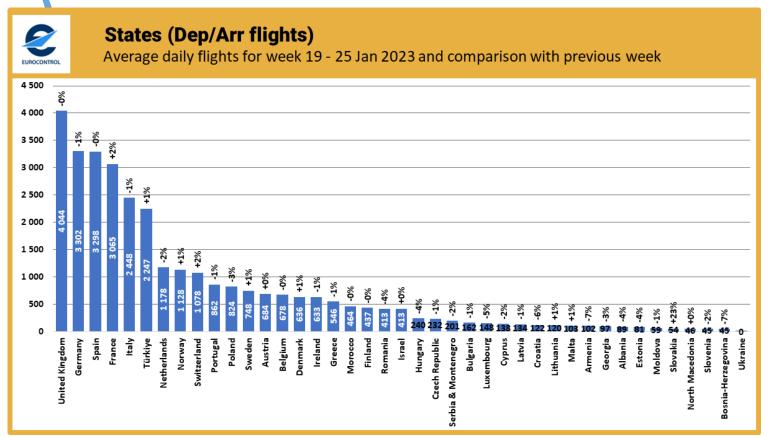
7-day average - FIRs at altitude FL200



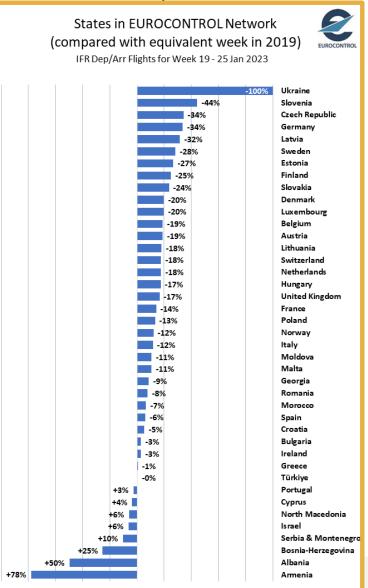




STATES (AVERAGE DAILY DEPARTURE/ARRIVAL FLIGHTS FOR THE LAST WEEK)

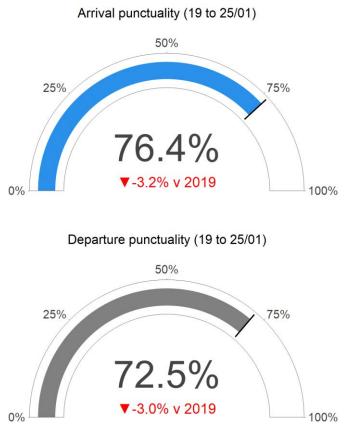


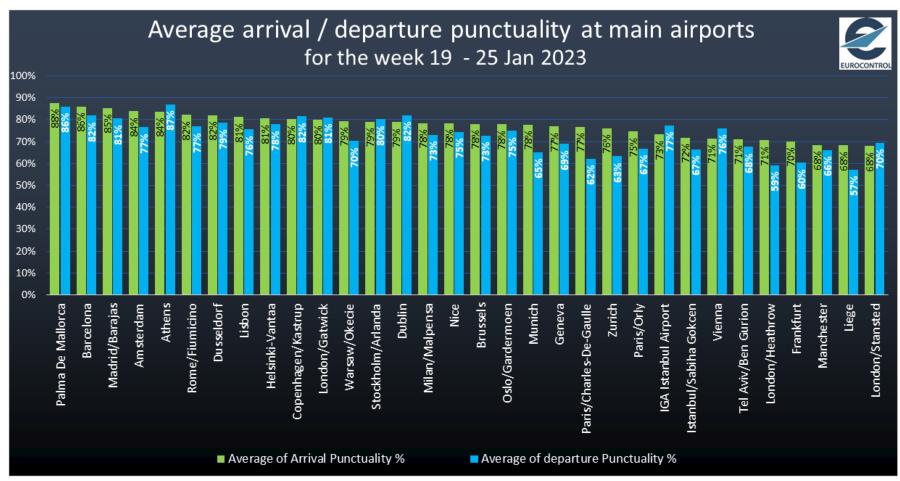
- ★ Highest increases in flights vs previous week for France (+2%), Türkiye (+8%), Switzerland (+2%), Norway (+1%), Slovakia (+23%) and Sweden (+1%).
- **★** Largest decreases for **Germany** (-1%), **Poland** (-3%) and the **Netherlands** (-2%).
- ★ Traffic levels ranging from -100% (Ukraine) to +78% (Armenia), compared to 2019.





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

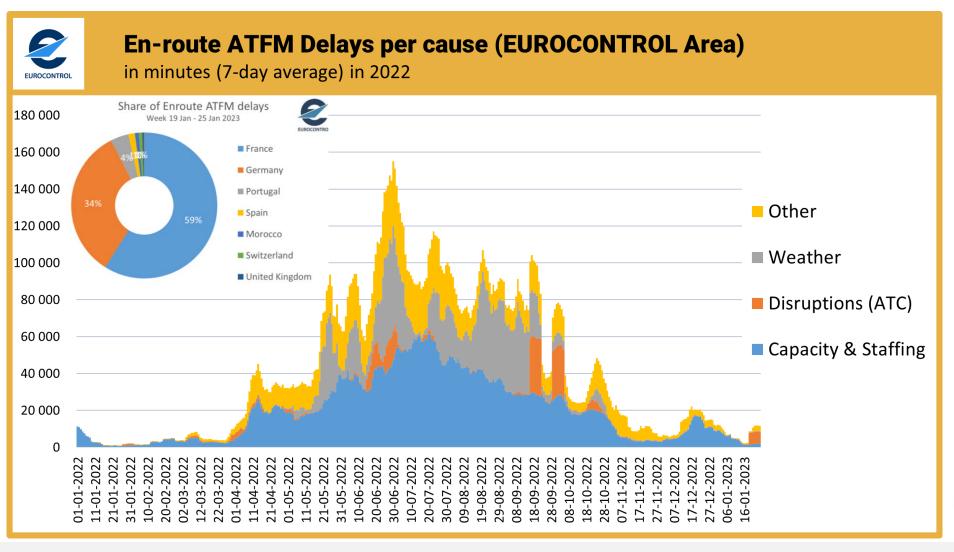




- *Arrival and departure punctuality have improved slightly in the last week but are still lagging behind 2019 levels.
- ★ More detailed information be found on our new daily punctuality dashboards: main link, States link and Airports link.



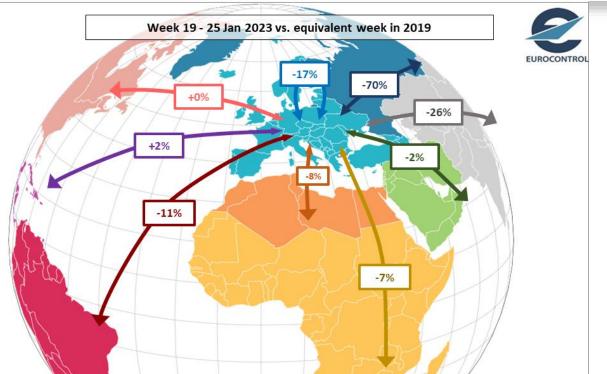




- ★Since the start of the Winter schedule, we observe a big reduction of ATFM delays at Network level.
- ★ Delays have slightly increased last week, especially due to ATC industrial actions in France (18-20 Jan 2023).
- ★ Major contributors over the last 7 days: France (59% of all en-route ATFM delays), Germany (34%) and Portugal (4%).

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

- *The main traffic flow was intra-European with 16,335 flights on average for the most recent week, stable over the previous week.
- *The Inter-Continental flow, recording 4,400 daily flights for the most recent week, in line with the previous week levels.
- ** Flows between **Europe** and **Other Europe** (incl. **Russia**) were at -5% compared to 2019.
- **✗** Flows between **Europe** and **Asia/Pacific** were at -26% compared to 2019.
- **★** Flows between **Europe** and **Middle-East** were at -2% compared to 2019. Domestic flows in the Middle-East are now back to pre-COVID levels.

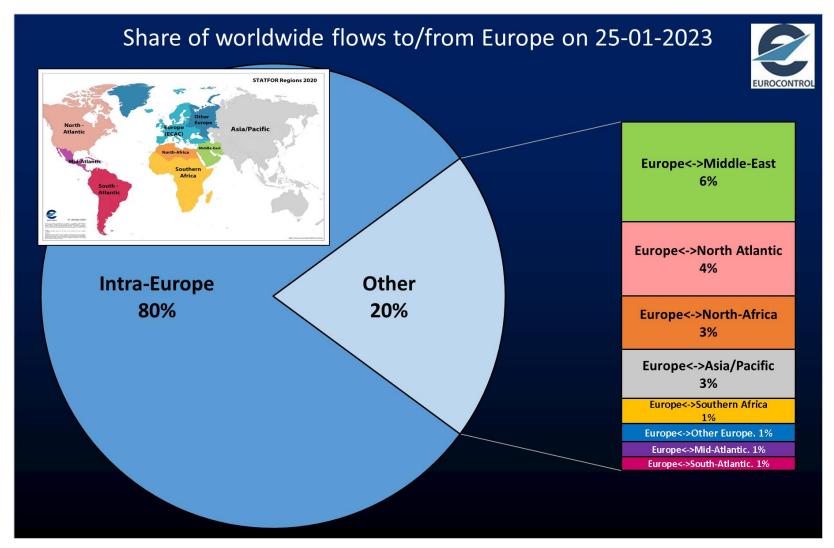


REGION (Average daily flights)	Week 12/01/2023 - 18/01/2023	Week 19/01/2023 - 25/01/2023	%	vs. 2019
Intra-Europe	16 310	16 355	+0 %	-17 %
Europe<->Asia/Pacific	595	578	-3%	-26%
Europe<->Mid-Atlantic	198	192	-3%	+2%
Europe<->Middle-East	1 243	1 244	+0%	-2%
Europe<->North Atlantic	920	907	-1%	+0%
Europe<->North-Africa	809	788	-3%	-8%
Europe<->Other Europe	236	225	-5%	-70%
Europe<->South-Atlantic	164	163	-1%	-11%
Europe<->Southern Africa	307	303	-2%	-7%
Non Intra-Europe	4 473	4 400	-2 %	-16%



TRAFFIC FLOWS (SHARE OF FLOWS TO/FROM EUROPE FOR THE LAST WEEK)





- ✗ Over the last week, intra-European flows accounted for80% of the total traffic.
- ★ Dealing with the intercontinental flows, the busiest partner with Europe was the Middle-East (accounting for 6%) followed by North-Africa and North Atlantic (4% each). The respective shares remained stable compared to 2019.
- ★ "Other Europe" (Russian Federation) is the 6th busiest partner accounting for 1% (in 2023); it was the 3rd in 2019.



COUNTRY PAIRS (AVERAGE DAILY FLIGHTS FOR THE LAST WEEK)



Rank evolution	Top 10 Country-Pair on week 19 - 25 Jan 2023							
over prev. week	Country-Pair	Avg daily flights	vs previous week	% vs 2022	% vs 2019			
→	Spain <-> Spain	1 060	7 +3% +32	7 +27%	-1%			
→	Türkiye <-> Türkiye	800	7 +4% +32	7 +39%	-19%			
→	France <-> France	781	7 +5% +34	3 -2%	-22%			
71	UK <-> UK	720	7 +4% +28	7 +28%	-22%			
2	Norway <-> Norway	710	7 +1% +6	7 +16%	-5%			
→	Italy <-> Italy	657	7 +1% +8	7 +17%	-8%			
→	Germany <-> Germany	471	3 -2% -7	7 +10%	-50%			
→	Spain <-> United Kingdom	421	3 -1% -6	7 +76%	-6%			
→	Germany <-> Spain	276	3 -3% -8	7 +18%	-29%			
71	Sweden <-> Sweden	273	₹ +4% +10	7 +35%	-25%			

Eight of the top 10 flows in 2022 were domestic:

★ Spain-Spain is the country-pair with the highest number of dep/arr flights (1,060) followed by **Türkiye-Türkiye** (800), **France-France** (781), **UK-UK** (720), **Norway-Norway** (710) and **Italy-Italy** (657).

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

- **★ France-France** (+5%) mainly due to light AOs.
- **★ Türkiye-Türkiye** (+4%) mainly due to Turkish Airlines and SunExpress.
- **★ Spain-Spain** (+3%) mainly due to light AOs.

Decrease for:

★ Germany-Spain (-3%) mainly due to Eurowings, Lufthansa, Ryanair and Vueling.





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

Top 10

Rank evolution	Top 10 Airports on week 19 Jan - 25 Jan 2023							
over prev. Week	Airport	Average Daily Dep/Arr Flights	vs previous week			% vs 2022		% vs 2019
→	IGA Istanbul Airport	1 242	71	+9	+1%	71	+85%	n/a
→	London/Heathrow	1 098	7	-44	-4%	71	+66%	-9 %
→	Paris/Charles-De-Gaulle	1 050	2	-23	-2%	71	+38%	-12%
→	Amsterdam	980	4	-15	-1%	71	+22%	-20%
→	Madrid/Barajas	976	7	+3	+0%	71	+30%	-8%
→	Frankfurt	930	3	-40	-4%	71	+29%	-26%
→	Barcelona	658	2	-5	-1%	71	+51%	-14%
→	Munich	630	2	-8	-1%	71	+31%	-41%
→	Istanbul/Sabiha Gokcen	567	7	+5	+1%	71	+33%	-7%
→	Zurich	542	2	-9	-2%	71	+52%	-24%

★iGA Istanbul is the airport with the highest number of dep/arr flights (1,242), followed by **London Heathrow** (1,098), **Paris CDG** (1,050), **Amsterdam** (980) and **Madrid** (976).

Within the top 10, seven airports only posted decreases over the previous week.

Main decreases for:

- ** London Heathrow (-4%) mainly due to bad weather affecting mostly British Airways. On flows with Germany, Switzerland and the US.
- ★ Frankfurt (-4%) mainly due to Lufthansa. On domestic flows and flows with the UK, Poland and Spain.
- **★ Paris CDG** (-2%) owing to the national strike, affecting mostly Air France. On flows with Germany and the UK.

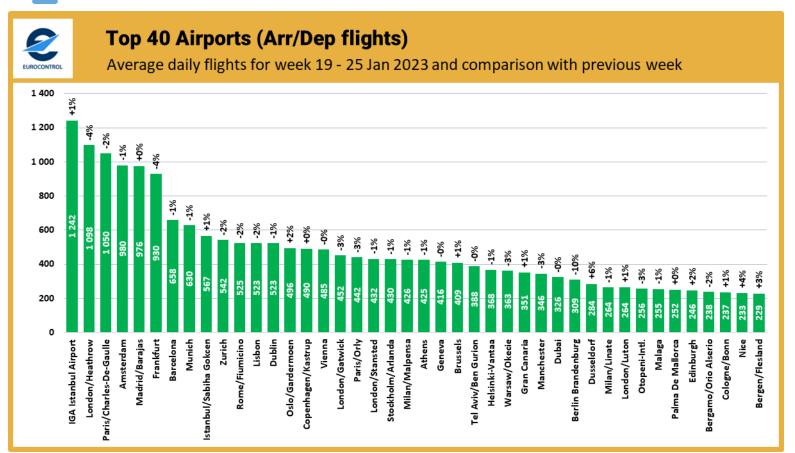
Main increase:

★ iGA Istanbul (+1%) mainly due to
Turkish Airlines. On domestic flows a
well as flows with Saudi Arabia, UAE
and Israel.

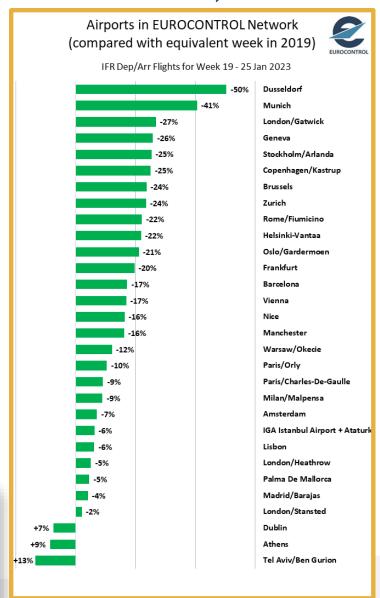




AIRPORTS (AVERAGE DAILY DEPARTURE/ARRIVAL FLIGHTS FOR THE LAST WEEK)



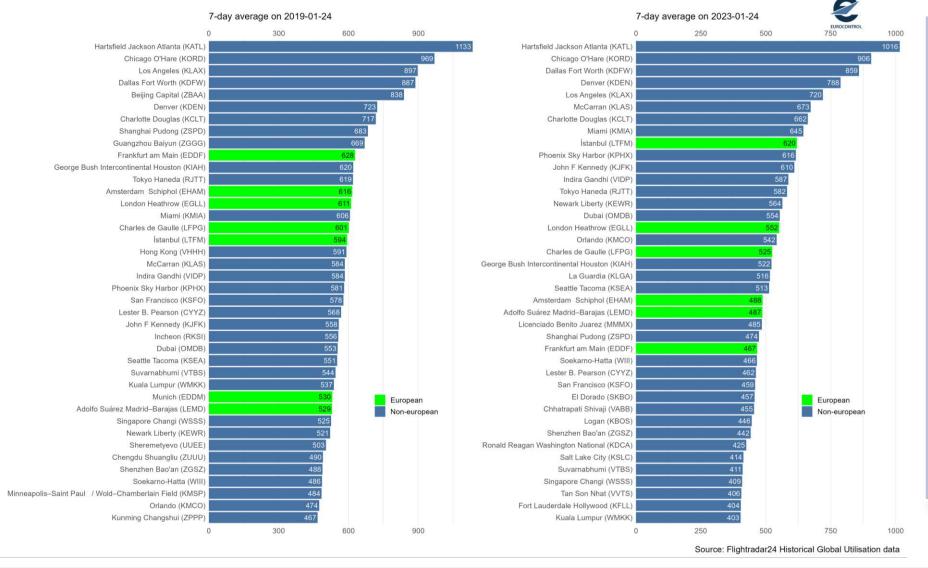
- **★** Highest increases in flights vs the previous week for **Düsseldorf** (+6%), **Oslo Gardemoen** (+2%), **iGA Istanbul** (+1%), **Edinburgh** (+2%) and **Brussels** (+1%).
- **★** Largest decreases (flights) for **London Heathrow** (-4%, freezing fog), **Frankfurt** (-4%) and **Berlin** (-10%).
- ★ Traffic levels ranging from -50% (Düsseldorf) to +13% (Tel Aviv) compared to 2019.





TOP 40 GLOBAL AIRPORTS (AVERAGE DAILY DEPARTURE FLIGHTS)





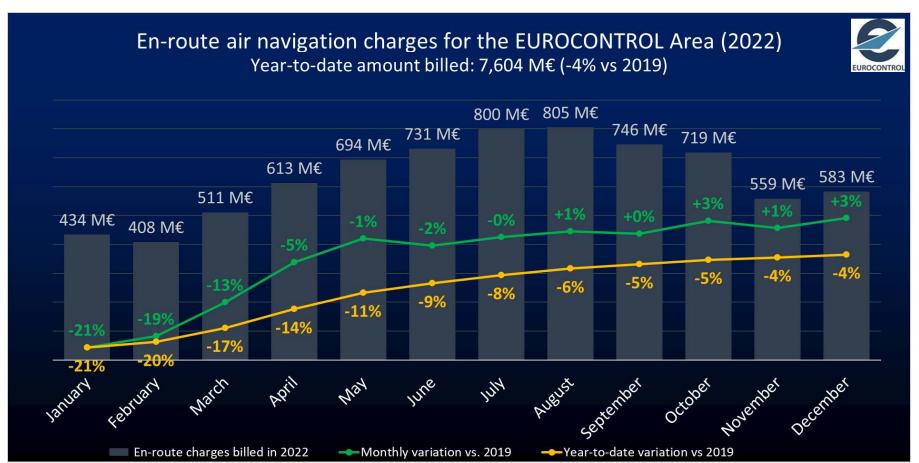
Comparing week ending 09 January 2023 (right) with the same week in 2019 (left):

- **★6 European airports** are ranked in the **Top 40** global airports (vs 7 in 2019, Munich is no longer within the top)
- ★The first European airport (rank 9) is iGA Istanbul*.
- ★ Two other airports are in theTop 20: London Heathrow(16) and Paris Charles deGaulle (18).
- ★The first Asian airport currently is New Delhi (12th).



EN-ROUTE AIR NAVIGATION CHARGES

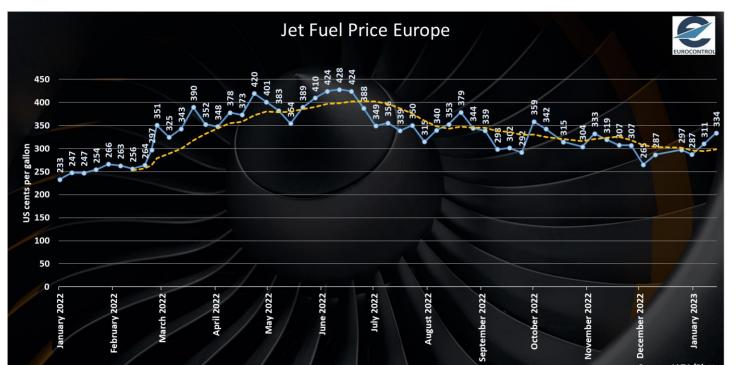




- **≭ EUROCONTROL** has billed **7,604 M€** in 2022.
- ★This is 4% below the amount billed for the same period in 2019.



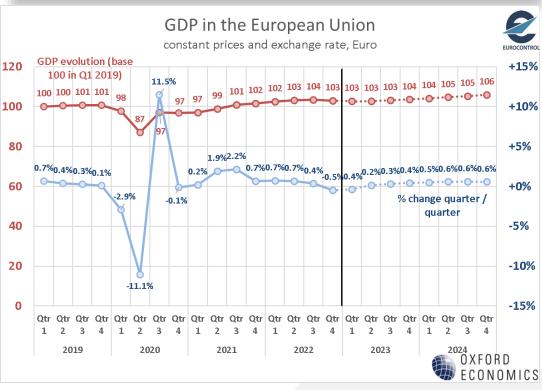
FUEL & TICKET PRICES



- **✗ Jet fuel prices** surged to 334 cents/gallon on 20 January:
 - +16% vs early January 2023;
 - +7% vs December 2022;
 - +26% vs January 2022.



- According to Oxford Economics, European Union recorded a 3.4% GDP growth in 2022 (on 2021).
- **★** GDP in the region is expected to stagnate (0%) in 2023 and to increase by 1.9% in 2024.
- ✗ On a quarterly basis, the trough in quarter-on-quarter European GDP growth was in Q4 last year and growth is expected to improve in 2023.



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:

<u>www.eurocontrol.int/Economics/DailyTrafficVariation</u> (or via the COVID-19 button on the top of our homepage <u>www.eurocontrol.int</u>)



• 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 <u>aviation.intelligence@eurocontrol.int</u>





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