

Headlines (Week of 02 – 08 February 2023)

- The **network** recorded **22,049 daily flights on average** over the past week (stable on previous week), +24% vs 2022 and **86% of 2019 levels**.
- Network traffic (flights) in line with the base EUROCONTROL Traffic Scenario: 86% for January vs 2019, 84% for February vs 2019 (so far).
- Overall, flight levels have slightly increased (+2%) compared to the previous week.
- Ryanair was the busiest Aircraft Operator with 2,177 flights per day on average (+13% vs 2022), followed by Turkish Airlines (1,223; +22%), easyJet (994; +243%), Lufthansa (966; +34%), Air France (870; +34%), British Airways (723; +76%) and Wizz Air (658; +85%).
- **IGA Istanbul** remains the busiest airport within the network (1,193 flights) and is ranked 12 globally. Turkish airports were affected by bad weather conditions over last week-end as well as the impact of the earthquake earlier this week.
- Arrival punctuality (within 15 min.) is ~77% while departure punctuality is ~73%, both below 2019 levels.
- As is normal in winter, **ATFM delays are relatively low**, although they did slightly increase, mainly due to two ATC disruptions (industrial action in France late January and early February).
- Jet fuel prices increased to 272 cts/gallon on 03 February 2023 (-13% compared to January 2023).

Traffic Situation

Average daily flights (including overflights)

Week 02 - 08 Feb 2023

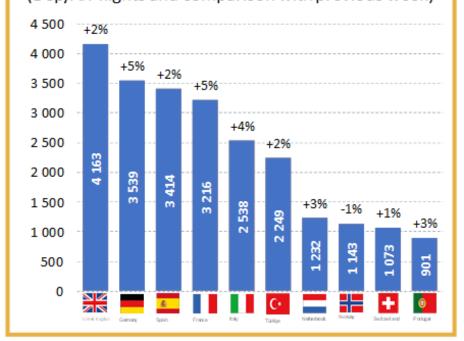
+24% vs

s equivalent veek in 2022

86% of 2019

Top 10 Busiest States

on week 02 - 08 Feb 2023 (avg daily flights)
(Dep/Arr flights and comparison with previous week)



TOP 10 AIRCRAFT OPERATORS, TOP 10 STATES



Top 10 Aircraft Operators

Week 02 - 08 Feb 2023 (avg daily flights)



Operated 2 177 flights vs same week in 2022

+0% vs prev week



Operated 1 223 flights vs same week in 2022 -3% vs prev week



Operated 994 flights vs same week in 2022 +23% vs prev week



Operated 966 flights vs same week in 2022

+8% vs prev week



Operated 870 flights vs same week in 2022 +3% vs prev week



Operated 723 flights vs same week in 2022

+0% vs prev week



Operated 658 flights vs same week in 2022 -1% vs prev week



Operated 607 flights vs same week in 2022 +1% vs prev week



Operated 549 flights vs same week in 2022 +2% vs prev week



Operated 477 flights vs same week in 2022 +11% vs prev week



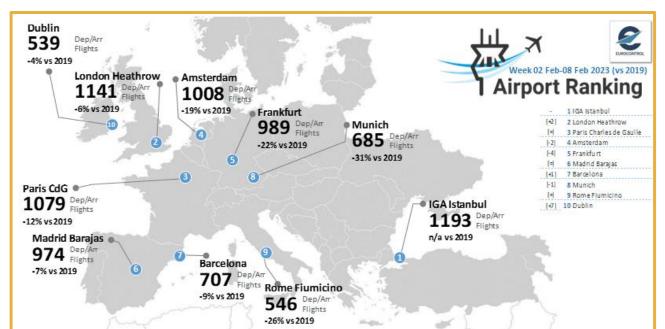
Top 10 States

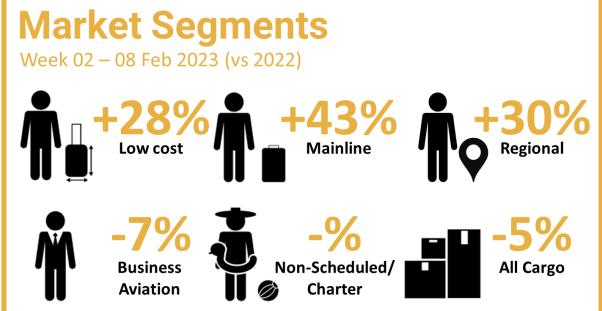
Week 02 - 08 Feb 2023 (avg daily dep/arr)



TOP 10 AIRPORTS, FLOWS AND MARKET SEGMENTS







Traffic Flow

Average daily flights in week 02 - 08 Feb 2023

	Flights	vs prev week	vs 2022	vs 2019
Intra-European	16,930	+3%	+22%	-14%
Intercontinental	4,439	+2%	+34%	-15%

Economics

03 Feb. 2023 Avg Fuel price:

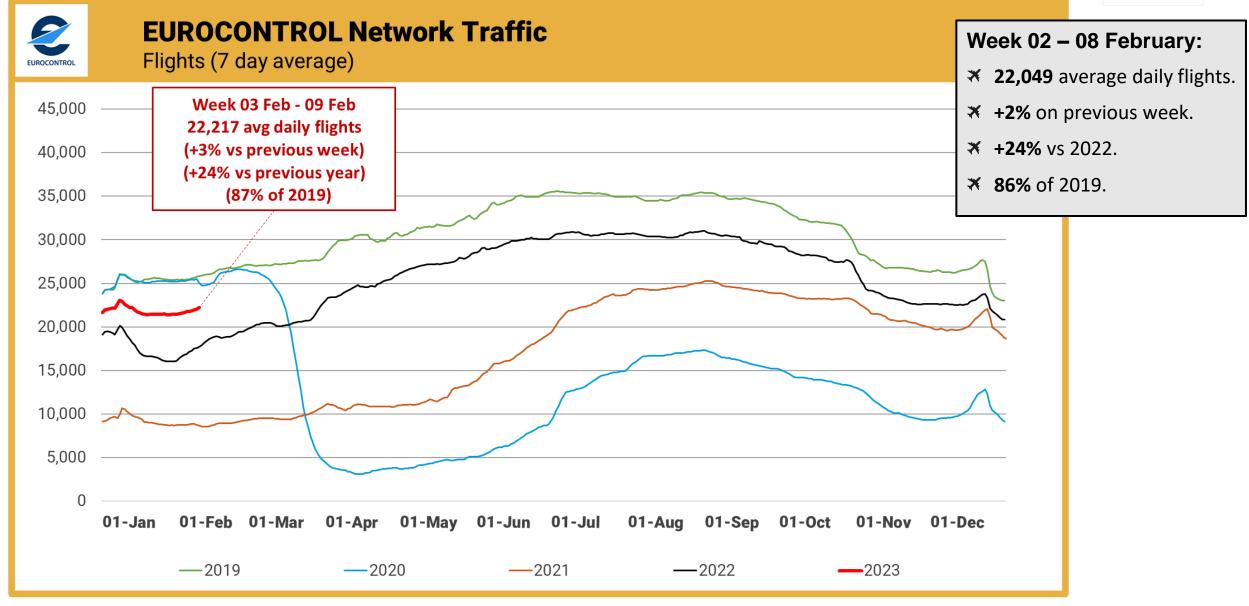
272 cents/gallon

-18%

vs. 334 cents/gallon on 20 Jan. 2023 Source: IATA/Platts

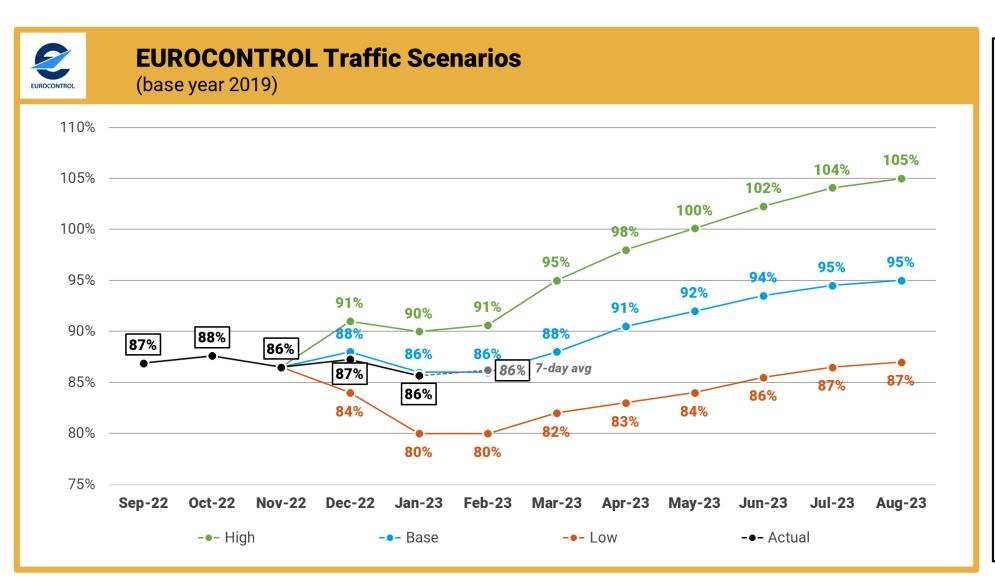
OVERALL TRAFFIC SITUATION AT NETWORK LEVEL





OVERALL SITUATION COMPARED TO THE EUROCONTROL TRAFFIC SCENARIOS





- ★ The last EUROCONTROL Traffic Scenarios were published on 16 December 2022.
- ★ In January 2023, actual traffic developed as expected (86% of 2019 levels).
- ★ Over the first 8 days of 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 +25% vs 2022.

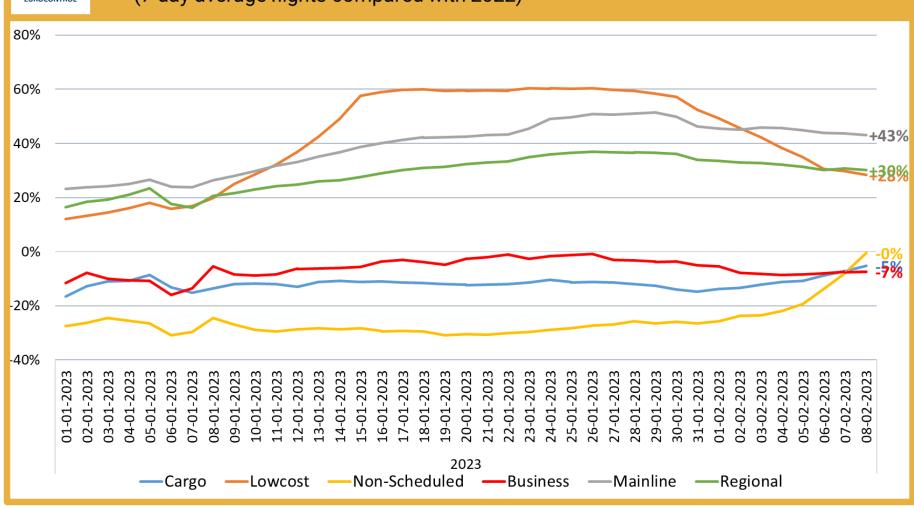
MARKET SEGMENTS





Market segments in the EUROCONTROL Network

(7-day average flights compared with 2022)



Until the 8th of February 2023, compared to **2022**:

- ** Low-Cost (+28%), Mainline (+43%) and Regional (+30%) are recording sustained growth rates compared to last year owing to the impact of Omicron wave in 2022 (significant restrictions were imposed between mid-January 2022 and early February). A year ago, the low-Cost segment was highly reactive to changes in rules.
- **★ Business Aviation** (-7%) and **All-cargo** (-5%) are the only two segments recording fewer flights in 2023 compared to 2022 levels.
- **★ Charter** (0%) is currently recording the same volumes of traffic in 2023 than in 2022.

AIRCRAFT OPERATORS

(AVERAGE DAILY FLIGHTS FOR THE LAST WEEK)



Rank evolution	Top 10 Aircraft Operators - Week 02 - 08 Feb 2023									
over prev. week	Aircraft Operator	Average daily flights	vs previous week	% vs 2022	% vs 2019					
→	Ryanair Group	2,177	7 +9 +0%	7 +13%	+13%					
→	Turkish Airlines	1,223	3 -42 -3%	7 +22%	-6%					
71	easyJet Group	994	7 +188 +23%	7 +24%	-23%					
3	Lufthansa Airlines	966	7 +69 +8%	7 +34%	-28%					
3	Air France Group	870	7 +25 +3%	7 +34%	-22%					
→	British Airways Group	723	₹ +2 +0%	7 +76%	-13%					
→	Wizz Air Group	658	3 -4 -1%	7 +85%	+42%					
→	KLM Group	607	7 +5 +1%	7 +9%	-15%					
→	SAS Group	549	₹ +12 +2%	7 +58%	-24%					
→	Vueling	477	7 +48 +11%	7 +89%	+4%					

- **Ryanair** is the busiest Aircraft Operator with 2,177 flights per day on average over last week (+13% vs 2022), followed by **Turkish Airlines** (1,223; +22%), **easyJet** (994; +24%), **Lufthansa** (966; +34%), **Air France** (870; +34%), **British Airways** (723; +76%) and **Wizz Air** (658; +85%).
- ★ In this Top 10, three Aircraft Operators record flight levels above 2019 levels:
 Ryanair (+13%), Wizz Air (+42%) and Vueling (+4%).

Within the top 10, **eight airlines** posted **increases** over the previous week:

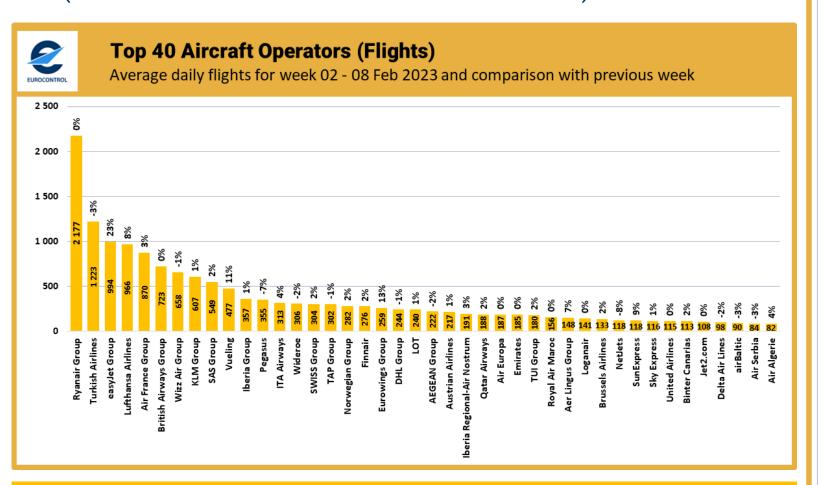
- ★ easyJet (+188 flights; +23%) mainly due to domestic flows in the UK, France and the flows Spain-UK as well as France-Italy.
- ★ Lufthansa (+69 flights; +8%) mainly due to domestic flows, flows between Germany and France, Spain, Switzerland and Italy.
- ★ Vueling (+48 flights; +11%) mainly due to domestic flows in Spain, the flows between Spain and Italy, France and the UK.
- ★ Air France (+25 flights; +3%) mainly due to flows between France and Portugal, Tunisia, the Netherlands and domestic flows in France.

Largest decreases for:

▼ Turkish Airlines (-42 flights; -3%) mainly due to bad weather conditions during last weekend and impact of the earthquake earlier this week.

AIRCRAFT OPERATORS

(AVERAGE DAILY FLIGHTS FOR THE LAST WEEK)

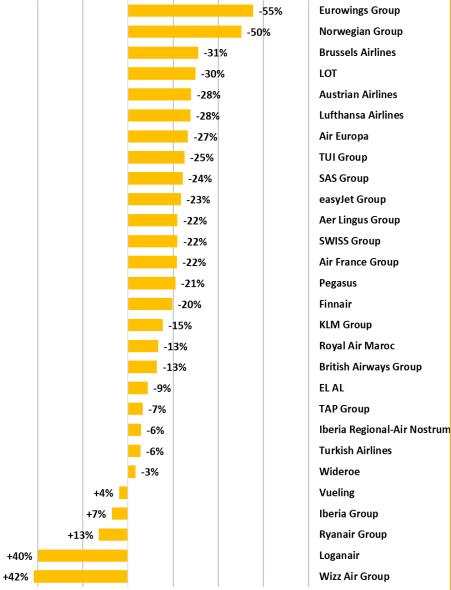


- ★ Highest increases in flights compared to previous week for easyJet (+23%), Lufthansa Airlines (+8%), Vueling (+4%), Eurowings (+13%) and Air France (+3%).
- **★** Largest decreases for **Turkish Airlines** (-3%), **Pegasus** (-7%) and **NetJets** (-8%).
- ★ Traffic levels ranging from -55% (Eurowings) to +42% (Wizz Air) vs 2019.

Aircraft Operators in the EUROCONTROL Network (compared with equivalent week in 2019)



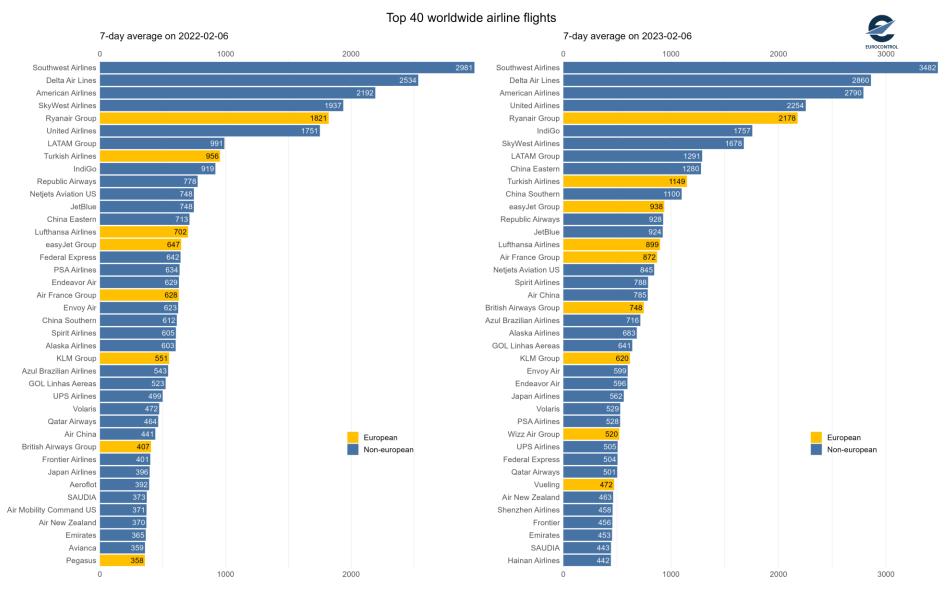
IFR Flights for Week 02 - 08 Feb 2023



TOP 40 GLOBAL AIRCRAFT OPERATORS

(AVERAGE DAILY DEPARTURE FLIGHTS)





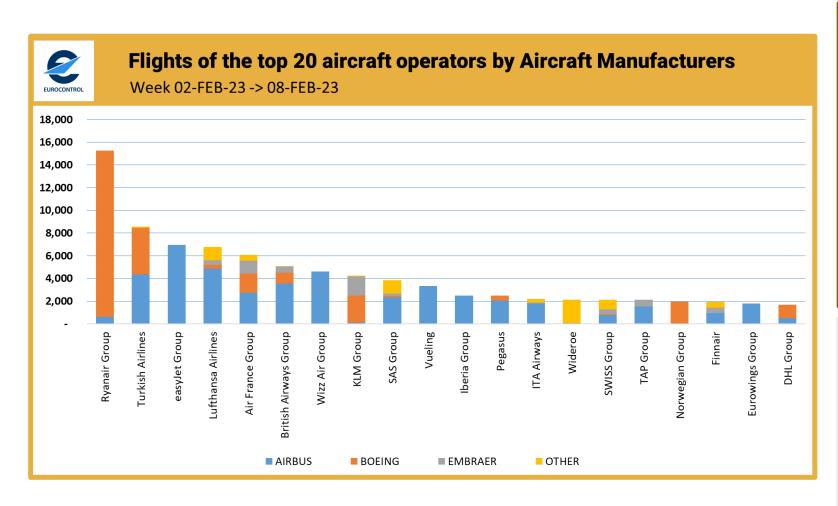
Comparing week ending 06 February 2023 (right) with the same week in 2022 (left):

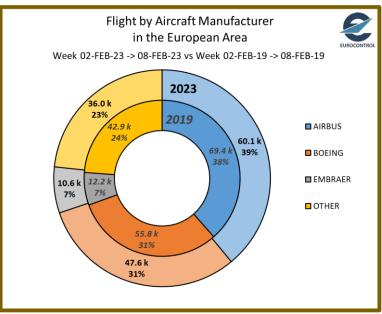
- **★ 9 European airlines** are ranked in the **Top 40** global aircraft operators (vs 8 in 2022).
- ★ The first European aircraft operator (rank 5) is Ryanair.
- ★ The other airline in the Top 10 is Turkish Airlines.
- ★ Wizz Air (30th) and Vueling (34th) are now part of the Top 40 (they were not in 2022).

AIRCRAFT MANUFACTURERS

(SHARE OF FLIGHTS FOR LAST WEEK)







- *At European level, 39% 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 53% while Boeing's share was 33%.

AIRCRAFT OPERATORS (AVERAGE DAILY FLIGHTS FOR THE LAST WEEK)



PERFORMANCE OF MAJOR CARGO CARRIERS



for the week 2 - 8 February 2023











PERFORMANCE OF MAJOR LONG-HAUL/LEGACY CARRIERS

PERFORMANCE OF MAJOR

REGIONAL CARRIERS*

for the week 2 - 8 February 2023



for the week 2 - 8 February 2023













PERFORMANCE OF MAJOR **LOW-COST CARRIERS**

for the week 2 - 8 February 2023

























STATES

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



Rank evolution	Top 10 States - Week 02 - 08 Feb 2023								
over prev. Week	State	Average daily Flights (Dep/Arr)	vs previous week			% vs 2022		% vs 2019	
→	United Kingdom	4,163	7	+93	+2%	7	+43%	-16%	
→	Germany	3,539	7	+172	+5%	7	+22%	-28%	
→	Spain	3,414	7	+79	+2%	7	+23%	-4%	
→	France	3,216	7	+166	+5%	71	+22%	-10%	
→	Italy	2,538	7	+101	+4%	7	+29%	-9%	
→	Türkiye	2,249	7	+47	+2%	7	+27%	+0%	
→	Netherlands	1,232	7	+35	+3%	71	+17%	-15%	
→	Norway	1,143	4	-10	-1%	7	+23%	-15%	
→	Switzerland	1,073	7	+15	+1%	7	+22%	-13%	
→	Portugal	901	7	+22	+3%	71	+32%	+6%	

- **★ UK** is the State with the highest number of dep/arr flights on average last week (4,163 flights; +43% vs 2022) followed by **Germany** (3,539; +22%), **Spain** (3,414; +23%), **France** (3,216; +22%), **Italy** (2,538; +29%) and **Türkiye** (2,249; +27%).
- ★ In this top 10, two States are above 2019 levels: Portugal (+6%) and Türkiye (0%).
 Spain is catching up with -4%.

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

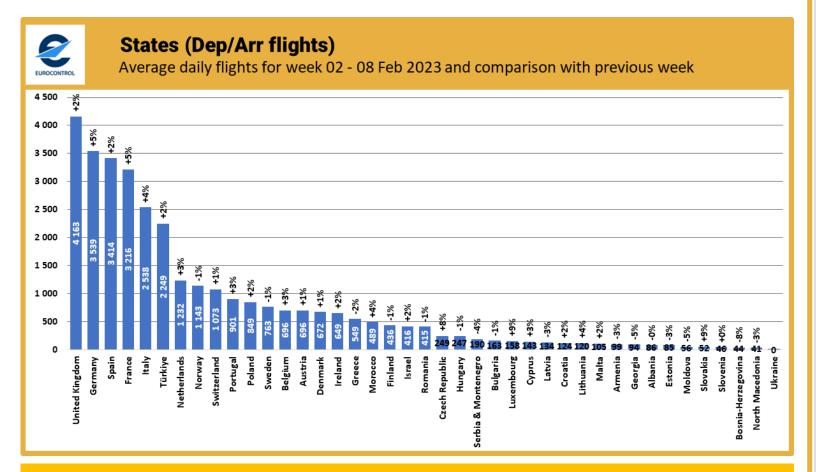
- **★ Germany** (+172 flights; +5%) mainly due to Lufthansa airlines and easyJet. On domestic flows, and flows with Italy, UK and Spain.
- ★ France (+166 flights; +5%) mainly due to easyJet, Air France and Vueling. Domestic flows and flows with UK, Italy and Spain.
- ★ Italy (+101 flights; +4%) mainly due to easyJet and to a lesser extent ITA Airways and Ryanair. Flows with France, Spain, Germany and domestic.

Largest **decreases** for:

★ Norway (-10 flights; -1%) mainly due to light AOs and domestic flows;

STATES

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



- ★ Highest increases in flights vs previous week for Germany (+5%), France (+5%), Italy (+4%), UK (+2%), Spain (+2%) and Türkiye (+2%).
- ** Largest decreases for Norway (-1%), Greece (-2%) and the Sweden (-1%).
- ★ Traffic levels ranging from -100% (Ukraine) to +85% (Armenia), compared to 2019.

States in the EUROCONTROL Network (compared with equivalent week in 2019)



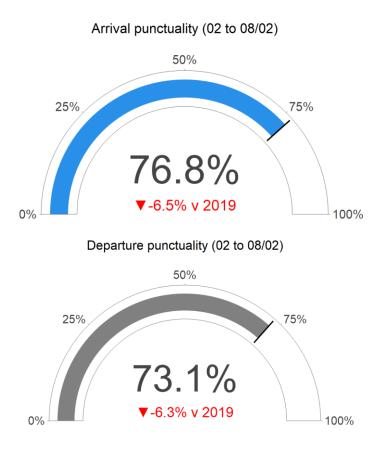
IFR Dep/Arr Flights for Week 02 - 08 Feb 2023

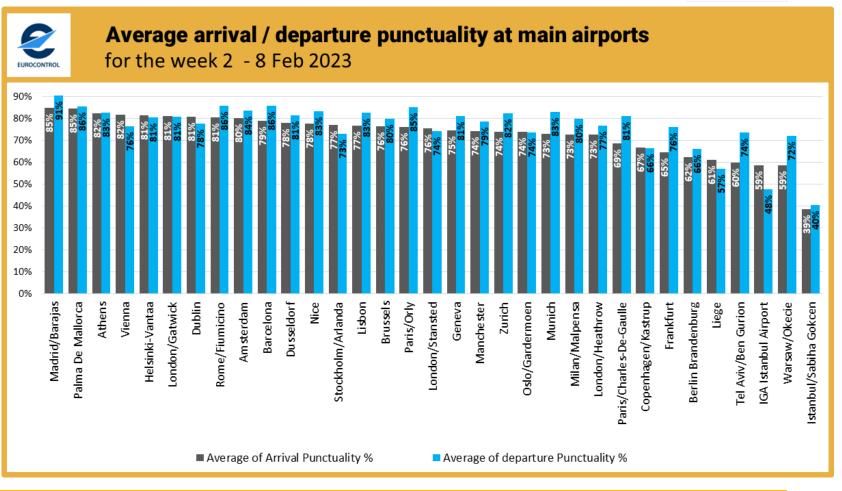


ARRIVAL & DEPARTURE PUNCTUALITY







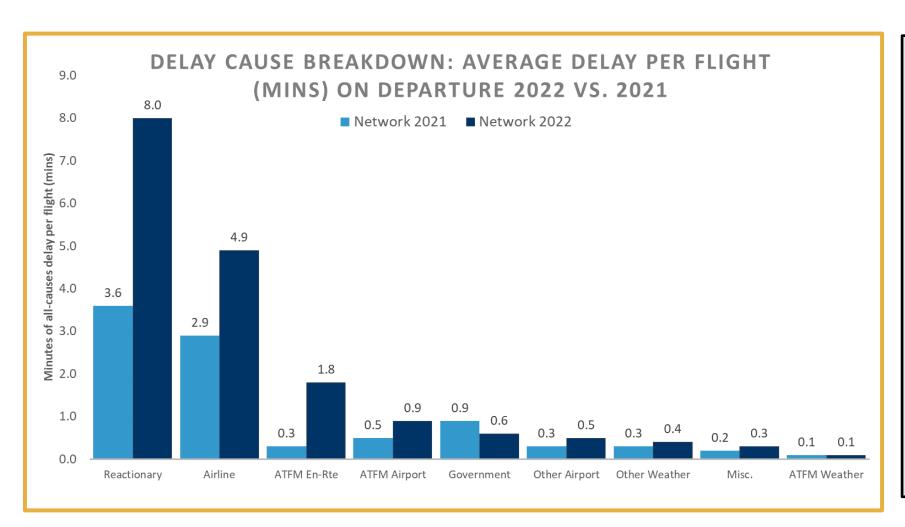


- * Arrival and departure punctuality have improved slightly in the last week but are still lagging behind 2019 levels.
- **▼** More detailed information can be found on our new daily punctuality dashboards: main link, States link and Airports link.

DEPARTURE PUNCTUALITY

BREAKDOWN OF DELAY BY CAUSE



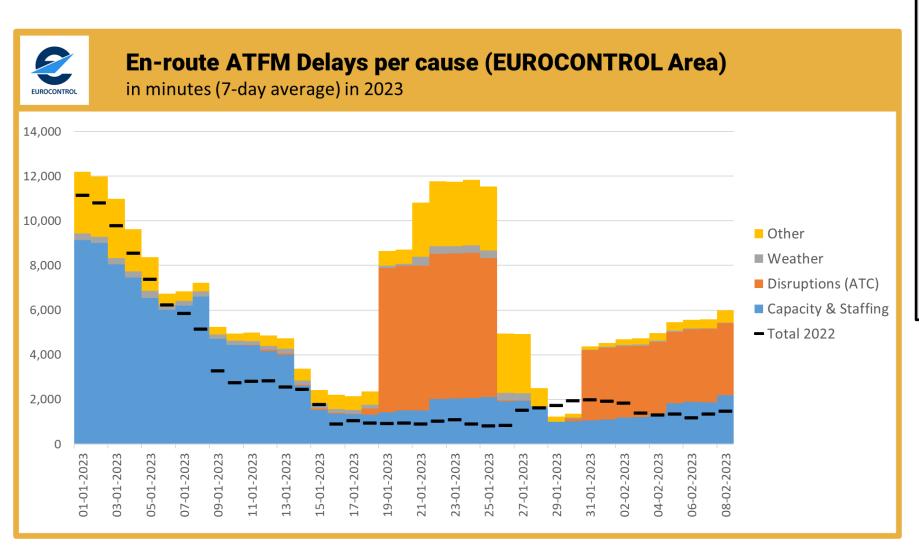


Overall, 2022 vs 2021

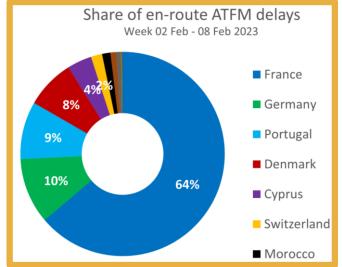
- ★ Sharp increase in the average delay per flight for 2022
- ★ Average delay per flight of 17.5 minutes a 92% increase vs. 2021 where the average delay per flight was 9.1 minutes
- ★ Reactionary (knock-on delay) generated 46% of delay mins
- ★ Airline delay nearly doubled
- ★ Sharp increase in en-route ATFM delay at 1.8 mins/flight

EN-ROUTE ATFM DELAYS





- ★ Since the start of the Winter schedule, we can see a big reduction in ATFM delays at Network level.
- ★ Delays have slightly increased over the last two weeks, especially due to ATC industrial actions in France (19 Jan, 31 Jan and 07 Feb 2023).
- ★ Major contributors over the last 7 days: France (64% of all en-route ATFM delays), Germany (10%) and Portugal (9%).

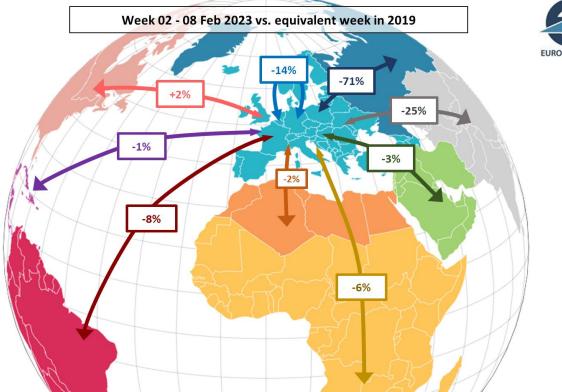


TRAFFIC FLOWS





- * The main traffic flow was intra-European with 16,930 flights on average for the most recent week, stable over the previous week.
- * The Inter-Continental flow, recording 4,439 daily flights for the most recent week, in line with the previous week levels.
- * Flows between **Europe** and **Other Europe** (incl. **Russian federation**) were at -71% compared to 2019.
- ₹ Flows between **Europe** and **Asia/Pacific** were at -25% compared to 2019.
- Flows between **Europe** and **Middle-East** were at -3% compared to 2019. Domestic flows in the Middle-East are now back to pre-COVID levels.



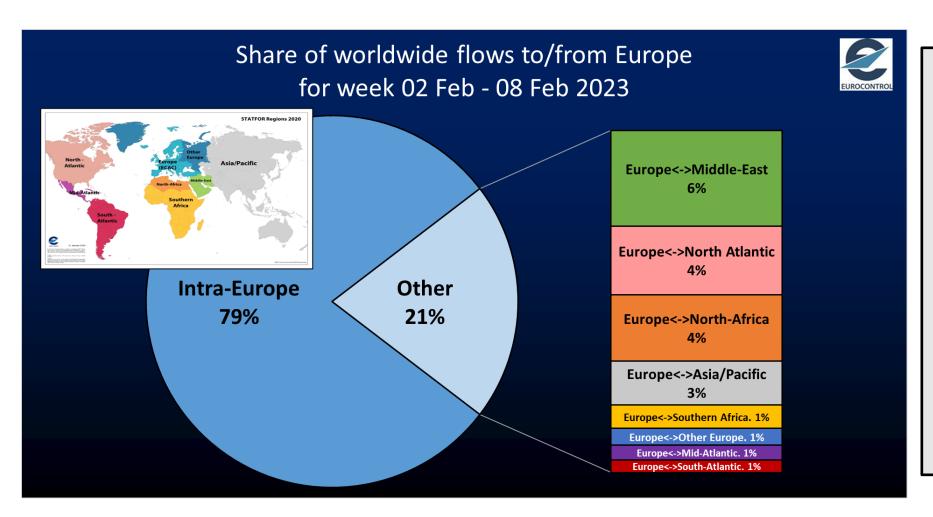


REGION (Average daily flights)	Week 26/01/2023 - 01/02/2023	Week 02/02/2023 - 08/02/2023	%	vs. 2019
Intra-Europe	16 493	16 930	+3%	-14%
Europe<->Asia/Pacific	550	571	+4%	-25%
Europe<->Mid-Atlantic	194	193	-0%	-1%
Europe<->Middle-East	1 217	1 242	+2%	-3%
Europe<->North Atlantic	896	892	-0%	+2%
Europe<->North-Africa	802	859	+7%	-2%
Europe<->Other Europe	220	217	-1%	-71%
Europe<->South-Atlantic	163	162	-1%	-8%
Europe<->Southern Africa	306	303	-1%	-6%
Non Intra-Europe	4 348	4 439	+2 %	-15%

TRAFFIC FLOWS

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





- ✗ Over the last week, intra-European flows accounted for 79% of the total traffic.
- ★ Dealing with the intercontinental flows, the busiest partner with Europe was the Middle-East (accounting for 6%) followed by North-Atlantic (4%) and North Africa (4%). 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-Pairs - Week 02 - 08 Feb 2023								
over prev. week	Country-Pair	Avg daily flights	\	s previo week		% vs 2022		% vs 2019	
→	Spain <-> Spain	1,068	7	+1%	+8	77	+19%	-1%	
→	Türkiye <-> Türkiye	849	7	+8%	+63	77	+22%	-13%	
→	France <-> France	831	71	+6%	+51	3	-3%	-17%	
77	UK <-> UK	716	71	+1%	+8	71	+19%	-21%	
7	Norway <-> Norway	709	3	-2%	-17	71	+15%	-10%	
→	Italy <-> Italy	656	71	+2%	+13	71	+11%	-9%	
→	Germany <-> Germany	551	71	+12%	+57	71	+10%	-39%	
→	Spain <-> United Kingdom	446	71	+5%	+21	7	+35%	-3%	
→	Germany <-> Spain	306	71	+5%	+14	7	+15%	-22%	
7	Ireland <-> United Kingdom	278	71	+2%	+5	77	+50%	-15%	

Seven of the top 10 flows in 2022 were domestic:

- **★ Spain-Spain** is the country-pair with the highest number of dep/arr flights on average last week (1,068 flights; +19% vs 2022) followed by **Türkiye-Türkiye** (849; +22%), **France-France** (831; -3%), **UK-UK** (716; +19%), **Norway-Norway** (709; +15%) and **Italy-Italy** (656; +11%).
- ★ In the Top 10, no flow has recovered to 2019 levels: indeed, most domestic flows have declined, in some cases due to a switch to rail.

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

- ★ Türkiye-Türkiye (+8%) mainly due to light AOs, Turkish Airlines and SunExpress.
- **★ Germany-Germany** (+12%) mainly due to light AOs and Lufthansa.
- * France-France (+6%) mainly due to light AOs and easyJet.

Decrease for:

✗ Norway-Norway (-2%) mainly due to light AOs, Wideroe and Bristow.

AIRPORTS

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



Rank evolution	Top 10 Airports - Week 02 Feb - 08 Feb 2023								
over prev. Week	Airport	vs previous week			% vs 2022		% vs 2019		
→	IGA Istanbul Airport	1,193	1	-30	-2%	7	+33%	n/a	
→	London/Heathrow	1,141	7	+4	+0%	7	+65%	-6%	
→	Paris/Charles-De-Gaulle	1,079	7	+29	+3%	7	+37%	-12%	
→	Amsterdam	1,008	71	+26	+3%	7	+17%	-19%	
71	Frankfurt	989	71	+45	+5%	7	+30%	-22%	
3	Madrid/Barajas	974	71	+8	+1%	7	+24%	-7%	
→	Barcelona	707	71	+50	+8%	7	+36%	-9%	
→	Munich	685	71	+51	+8%	7	+37%	-31%	
71	Rome/Fiumicino	546	71	+24	+5%	7	+57%	-26%	
71	Dublin	539	71	+10	+2%	7	+37%	-4%	

- **¥ iGA Istanbul** is the airport with the highest number of dep/arr flights (1,193; +33% on 2022), followed by London Heathrow (1,141; +65%), Paris CDG (1,079; +37%), Amsterdam (1,008; +17%), Frankfurt (989; +30%) and Madrid (974; +24%).
- In this top 10, **no** airport recovered to its 2019 levels. However, **Dublin** is catching up. iGA Istanbul was only partially opened in 2019, so no comparison is possible

Within the top 10, **all but one** airports posted **increases** over the previous week.

Main increases for:

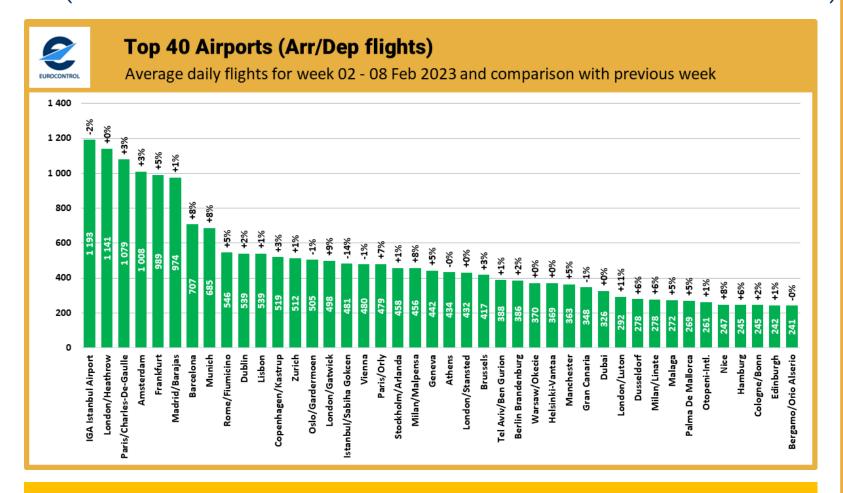
- ★ Munich (+51 flights; +8%) mainly due to Lufthansa. On domestic flows and flows with Italy, Switzerland and UK.
- ★ Barcelona (+50 flights; +8%) mainly due to Vueling, and easyJet (lesser extent). On domestic flows and flows with France, Italy and UK.
- ★ Frankfurt (+45 flights; +5%) mainly due Lufthansa. On flows with UK, Poland, France and domestic flows.

Decrease for:

★ iGA Istanbul (-30 flights;-2%) mainly due to Turkish Airlines. On flows with Germany, Iran and France. The bad weather over last week-end and the earthquake had a significant impact.

AIRPORTS

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

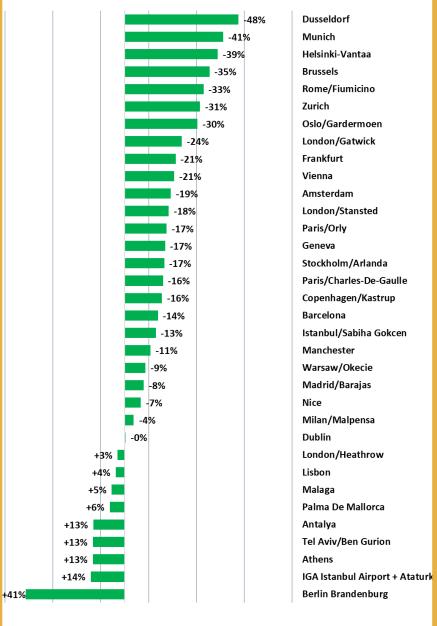


- ★ Highest increases in flights vs the previous week for Munich (+8%), Barcelona (+8%), Frankfurt (+5%), London Gatwick (+9%), Milan Malpensa (+8%) and Paris Orly (+7%).
- ** Largest decreases (flights) for Istanbul Sabiha Gokcen (-14%), iGA Istanbul (-2%) and Vienna (-1%).
- ★ Traffic levels ranging from -48% (Düsseldorf) to +41% (Berlin) compared to 2019.

Airports in the EUROCONTROL Network (compared with equivalent week in 2019)



IFR Dep/Arr Flights for Week 02 - 08 Feb 2023



TOP 40 GLOBAL AIRPORTS

(AVERAGE DAILY DEPARTURE FLIGHTS)

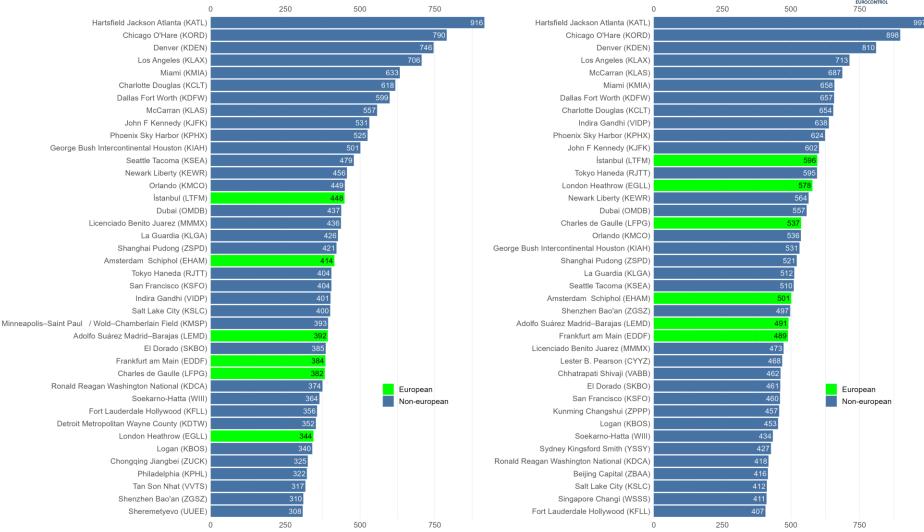
7-day average on 2022-02-06





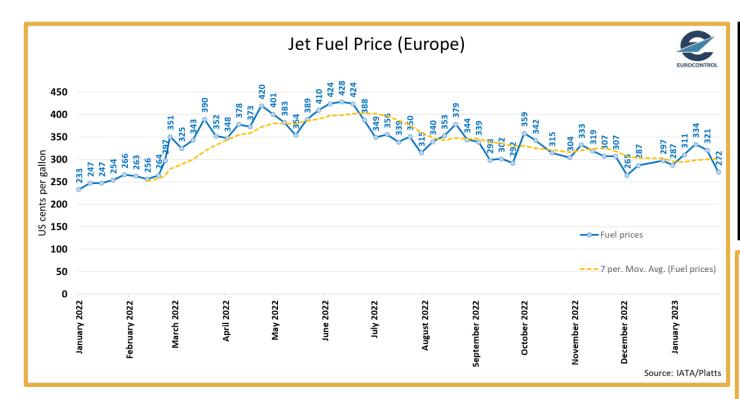
Comparing week ending 06 February 2023 (right) with the same week in 2022 (left):

- ★ 6 European airports are ranked in the Top 40 global airports (same airports in 2022).
- ★ The first European airport (rank 12) is iGA Istanbul.
- ★ Two other airports are in the Top 20: London Heathrow (14) and Paris Charles de Gaulle (17).
- **★** The first **Asian airport currently** is **New Delhi** (9th).



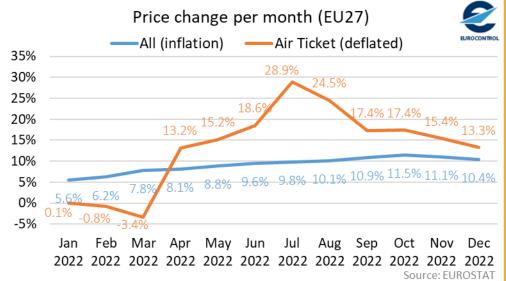
FUEL & TICKET PRICES





- **✗ Jet fuel prices** decreased to 272 cents/gallon on 03 February:
 - -18% vs 20 January 2023 (in last report);
 - +4% vs February 2022

- ★ In 2022, air ticket prices have increased by 16% compared to 2021 (peaking at +29% in July 2022).
- ₹ This is well above the average rate of inflation in the economy: +9% in 2022 (vs 2021).
- ★ This reflects inter alia sustained demand, reduced flight choice, and higher jet fuel prices.





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 every Friday for the last item:

1. EUROCONTROL Aviation Intelligence Portal:

www.eurocontrol.int/Economics/

This dashboard provides daily traffic data on Day+1 for all European States; for the largest airports; for each Area Control Centre (ACC) and the largest airline operators.



2. EUROCONTROL "Our Data" Portal:

www.eurocontrol.int/our-data/

This webpage provides an overview of key charts and publications related to European aviation performance.



3. Rolling Seasonal Plan:

 $\underline{www.eurocontrol.int/publication/european-network-operations-plan-2023-rolling-seasonal-plan}$

This Rolling Seasonal Plan covers a rolling six-week period and consolidates data from 350 airlines, 68 area control centres (ACCs), 55 airports and 43 States. It plays a major role in helping European aviation to recover by providing aviation's key actors with the global view they need to plan effectively.





© EUROCONTROL - February 2023

This document is published by EUROCONTROL for information purposes. It may be copied in whole or in part, provided that EUROCONTROL is mentioned as the source and it is not used for commercial purposes (i.e. for financial gain). The information in this document may not be modified without prior written permission from EUROCONTROL.

www.eurocontrol.int

For more information please contact aviation.intelligence@eurocontrol.int