

# Headlines (Week of 16 – 22 February 2023)

- The **network** recorded **23,366 daily flights on average** over the past week (stable on previous week), +22% vs 2022 and **87% of 2019 levels**.
- Network traffic (flights) **in line** with the **base** EUROCONTROL **Traffic Scenario**: 87% for February vs 2019 (so far).
- Overall, flight levels are stable (+0%) compared to the previous week. Generally, main operators have added flights to the network (KLM, easyJet, Vueling and British Airways) but others made fewer flights: Lufthansa (industrial action at German airports), Loganair (cancellations due to bad weather) and Turkish Airlines.
- Ryanair was the busiest Aircraft Operator with 2,180 flights per day on average (+12% vs 2022), followed by Turkish Airlines (1,329; +31%), easyJet (1,285; +21%), Air France (936; +17%), Lufthansa (873; +17%) and British Airways (769; +84%).
- **iGA Istanbul Airport** remains the busiest airport within the network (1,283 flights) and is ranked 10 globally.
- Arrival punctuality (within 15 min.) is ~77% while departure punctuality is ~71%, both below 2019 levels.
- As is normal in winter, ATFM delays are relatively low, although they did increase over the last two weeks, mainly due to ATC disruptions (industrial action in France), as well as industrial action at German airports.
- **Jet fuel prices** were **down** to **254** cts/gallon on 17 February 2023 (**-7%** over two weeks). They are now almost at the same level as in February 2022, before the invasion of Ukraine.

### **Traffic Situation**

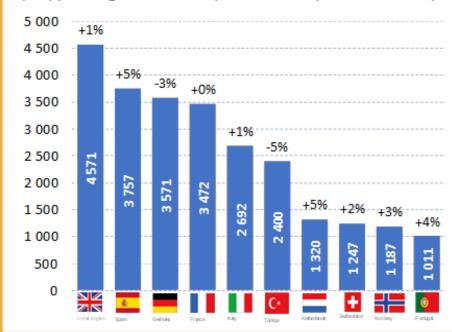
Average daily flights (including overflights)

Week 16 - 22 Feb 2023

+22% vs equivaler week in 202

# **Top 10 Busiest States**

on week 16 - 22 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 16 - 22 Feb 2023 (avg daily flights)



Vueling

+6% vs prev week

-0% vs prev week



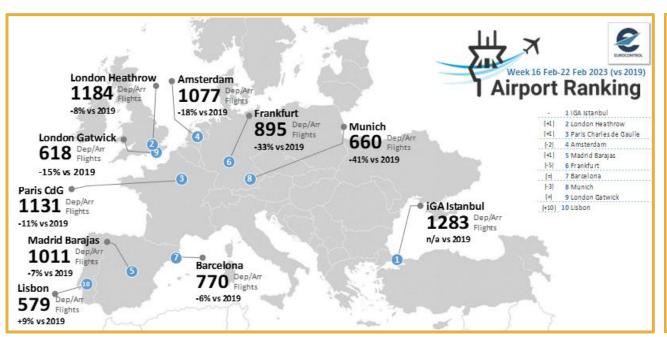
# **Top 10 States**

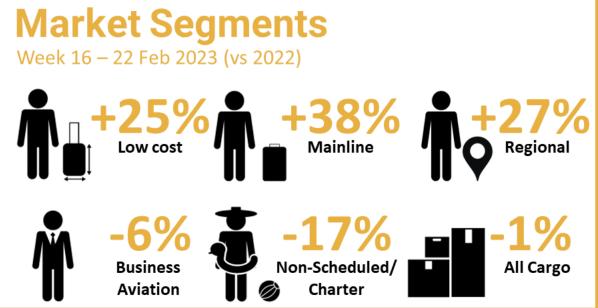
Week 16 - 22 Feb 2023 (avg daily dep/arr)



# TOP 10 AIRPORTS, FLOWS AND MARKET SEGMENTS



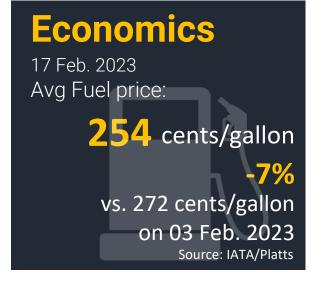




# **Traffic Flow**

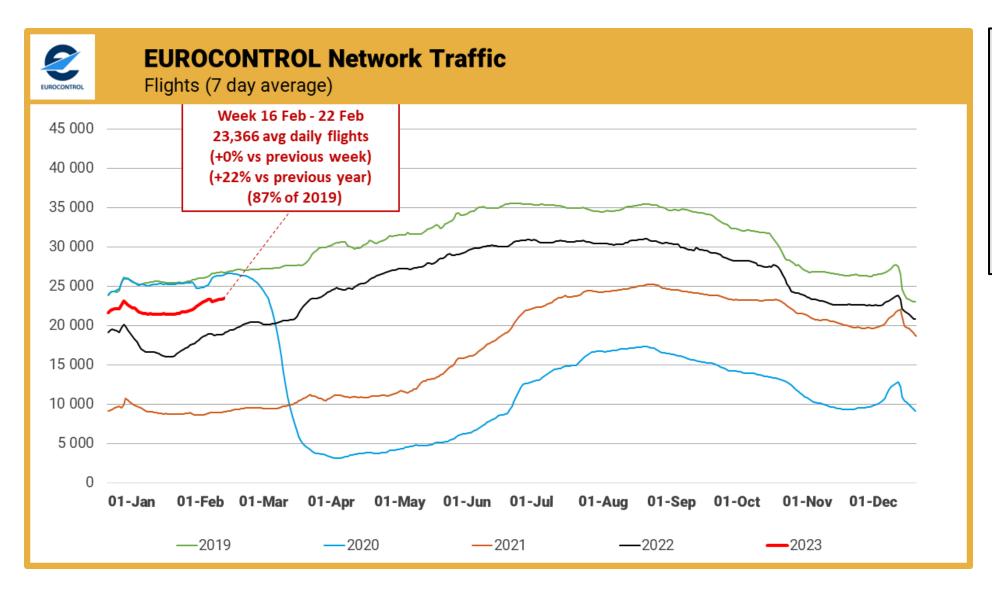
Average daily flights in week 16 - 22 Feb 2023

	Flights	vs prev week	vs 2022	vs 2019
Intra-European	18 032	+0%	+22%	-13%
Intercontinental	4 621	+1%	+25%	-13%



### OVERALL TRAFFIC SITUATION AT NETWORK LEVEL



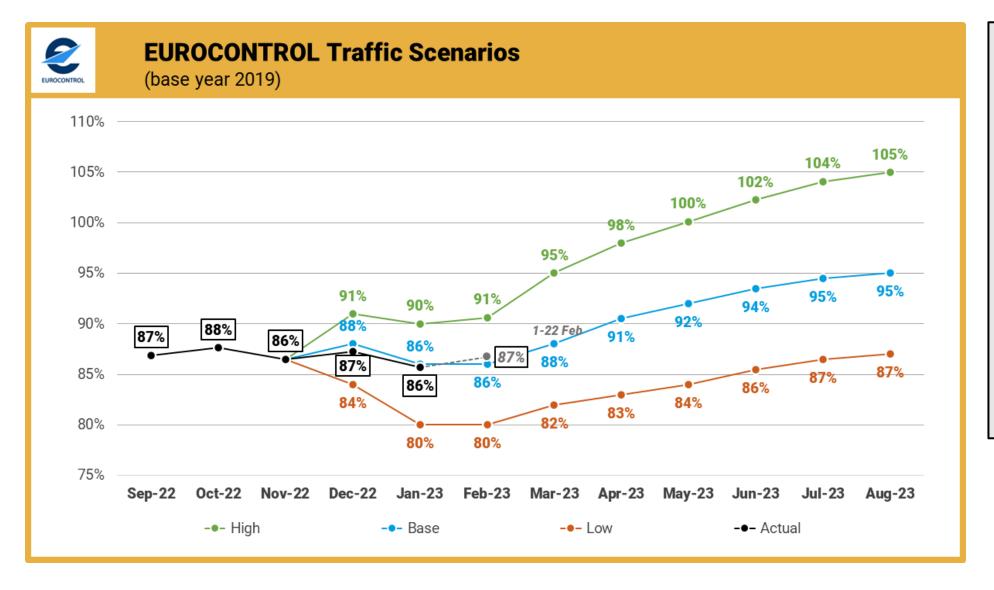


#### Week 16 – 22 February:

- **₹ 23,366** average daily flights.
- **X** Stable on previous week.
- **+22%** vs 2022.
- **87%** of 2019.

# OVERALL SITUATION COMPARED TO THE EUROCONTROL TRAFFIC SCENARIOS

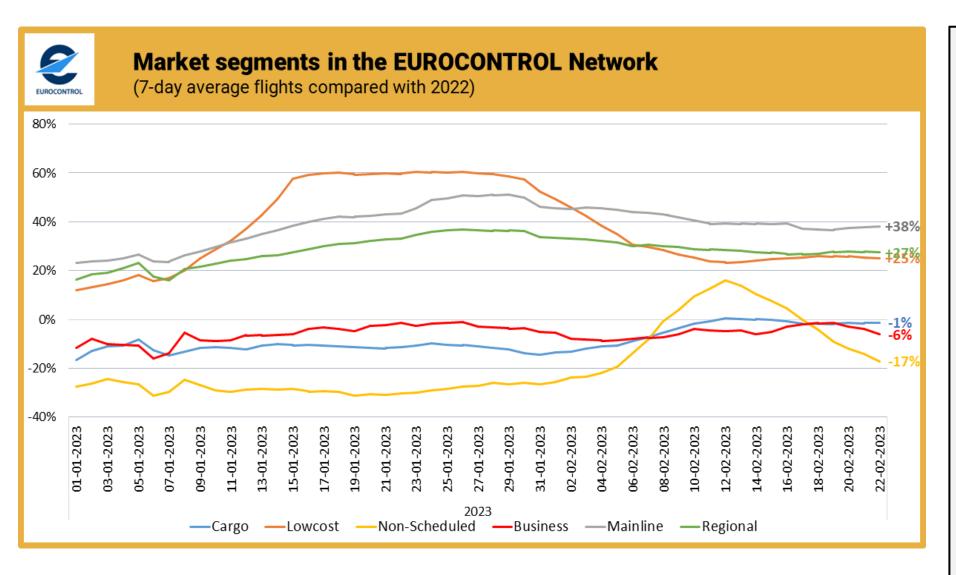




- ★ The last EUROCONTROL Traffic Scenarios were published on 16 December 2022.
- ★ Over the first 22 days of February, traffic is currently in line with the base scenario, at 87% of 2019 levels.
- ✗ On a year-to-date basis, traffic is currently at +25% vs 2022.

#### MARKET SEGMENTS





Until the 22<sup>nd</sup> of February **2023**, compared to **2022**:

- ★ Low-Cost (+25%), Mainline (+38%) and Regional (+27%) are recording sustained growth rates compared to last year owing to the continuous recovery and to the low levels of traffic in 2022 (after Omicron's wave from mid-January).
- ★ Business Aviation (-6%) and Allcargo (-1%) are recording fewer flights in 2023 compared to 2022 levels, recovery is levelling off.
- ★ Charter (-17%) is below the 2022 levels, partly explained by the impact of the war in Ukraine (some flows were reduced since end February 2022).

### AIRCRAFT OPERATORS

#### (AVERAGE DAILY FLIGHTS FOR THE LAST WEEK)



Rank evolution	Top 10 Aircraft Operators - Week 16 - 22 Feb 2023								
over prev. week	Aircraft Operator	Average daily flights			vs previous week			% vs 2022	% vs 2019
<b>→</b>	Ryanair Group	2 180		21	-5	-0%	7	+12%	+14%
<b>→</b>	Turkish Airlines	1 329		3	-19	-1%	71	+31%	+6%
<b>→</b>	easyJet Group	1 285		71	+39	+3%	71	+21%	-17%
71	Air France Group	936		71	+22	+2%	71	+17%	-17%
24	Lufthansa Airlines	873		3	-108	-11%	71	+17%	-41%
<b>→</b>	British Airways Group	769		71	+27	+4%	71	+84%	-15%
71	KLM Group	672		71	+57	+9%	71	+24%	-14%
2	Wizz Air Group	650		<u>u</u>	-12	-2%	71	+70%	+39%
<b>→</b>	SAS Group	558		->	-1	-0%	71	+37%	-30%
<b>→</b>	Vueling	517		7	+29	+6%	7	+100%	+9%

- **Ryanair** is the busiest Aircraft Operator with 2,180 flights per day on average over last week (+12% vs 2022), followed by **Turkish Airlines** (1,329; +31%), **easyJet** (1,285; +21%), **Air France** (936; +17%), **Lufthansa** (873; +17%), **British Airways** (769; +84%), **KLM** (672; +24%) and **Wizz Air** (650; +70%).
- **X** In this Top 10, four Aircraft Operators record flight levels above 2019 levels: **Ryanair** (+14%), **Turkish Airlines** (+6%), **Wizz Air** (+39%) and **Vueling** (+9%).

Within the top 10, **five airlines** posted **increases** over the previous week, amongst which:

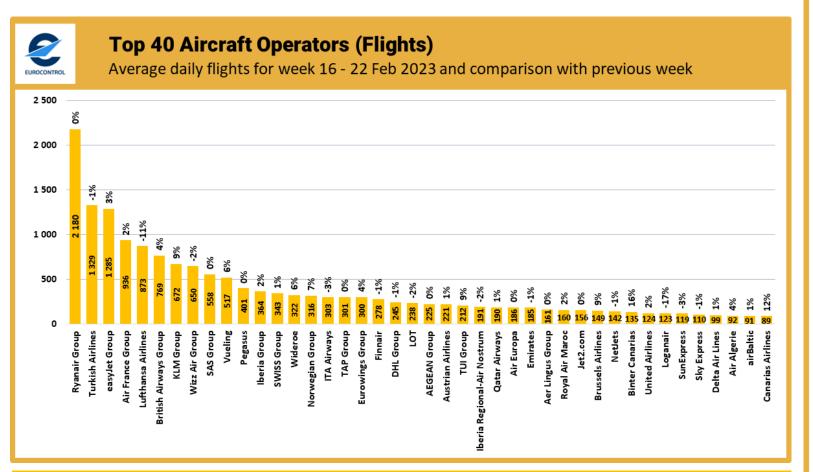
- **★ KLM** (+57 flights; +9%) mainly due to flows with Spain, UK, France, Italy and Portugal.
- **★ easyJet** (+39 flights; +3%) mainly due to flows between France and Italy, domestic UK, Spain and UK and France and Spain.
- ★ Vueling (+29 flights; +6%) mainly due to domestic flows in Spain, and flows between Spain and France, Italy and Switzerland.
- ★ British Airways (+27 flights; +4%) mainly due to flows between UK and the US, France, Switzerland and domestic flows.

#### **Largest decrease** for:

★ Lufthansa (-108 flights; -11%) mainly due to the industrial action in many German airports, having an impact on domestic flows and flows between Germany and France, the US and the UK.

#### AIRCRAFT OPERATORS

(AVERAGE DAILY FLIGHTS FOR THE LAST WEEK)

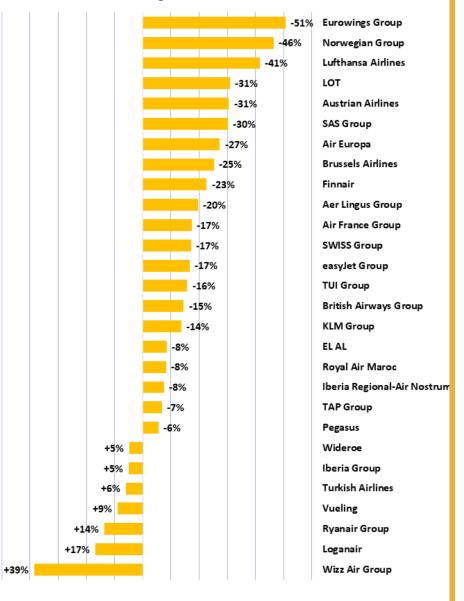


- ★ Highest increases in flights compared to previous week for KLM (+9%), easyJet (+3%), Vueling (+6%), British Airways (+4%), Norwegian (+7%) and Binter Canarias (+16%).
- ★ Largest decreases for Lufthansa (-11%, industrial action at German airports), Loganair (-17%, bad weather) and Turkish Airlines (-1%).
- **★** Traffic levels ranging from -51% (Eurowings) to +39% (Wizz Air) vs 2019.

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



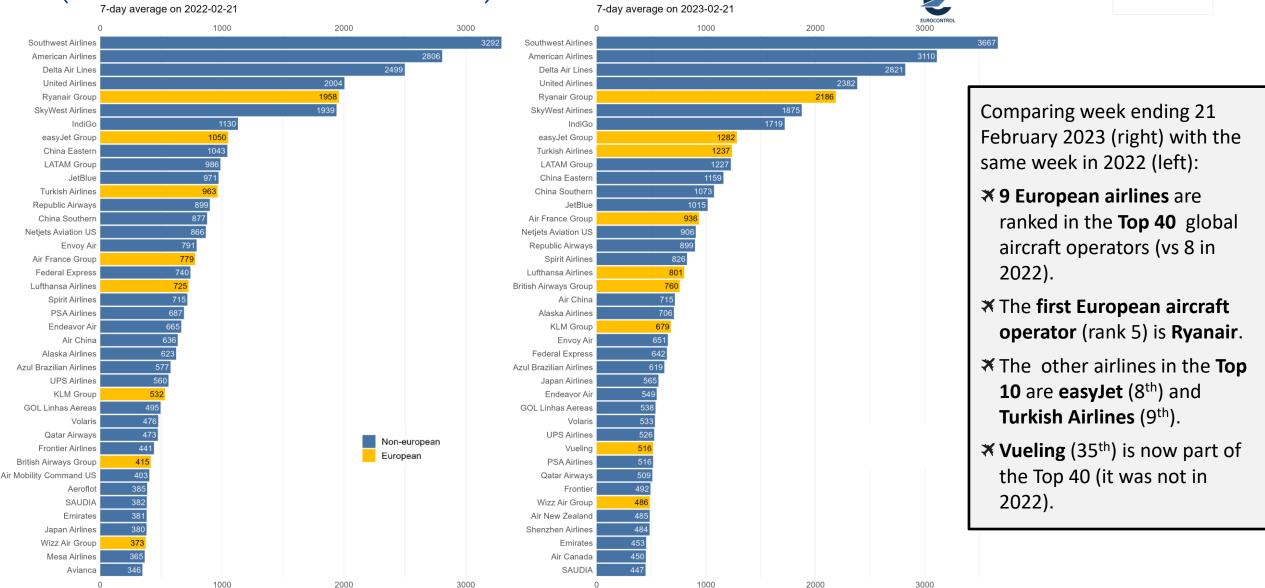
IFR Flights for Week 16 - 22 Feb 2023



#### TOP 40 GLOBAL AIRCRAFT OPERATORS

(AVERAGE DAILY DEPARTURE FLIGHTS)

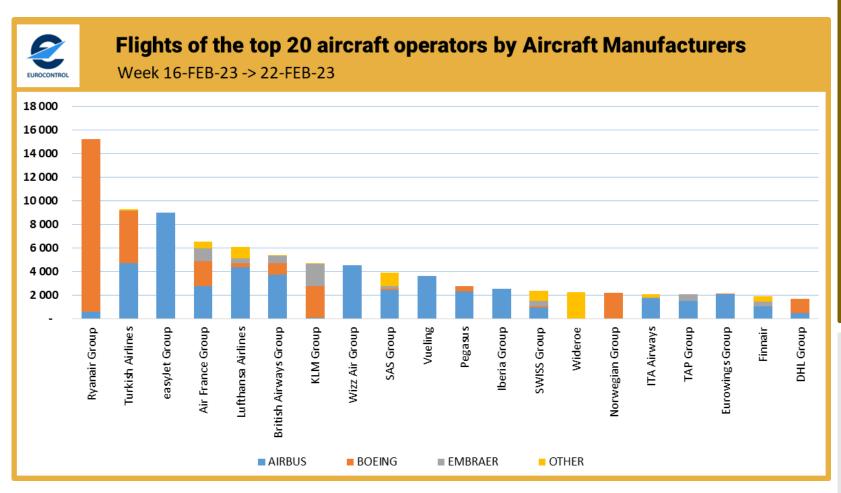


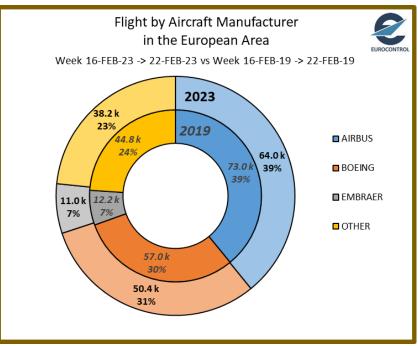


### AIRCRAFT MANUFACTURERS

(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 54% while Boeing's share was 32%.

# AIRCRAFT OPERATORS (AVERAGE DAILY FLIGHTS FOR THE LAST WEEK)



#### **PERFORMANCE OF MAJOR CARGO CARRIERS**



for the week 16 - 22 February 2023









#### PERFORMANCE OF MAJOR **LONG-HAUL/LEGACY CARRIERS**



for the week 16 - 22 February 2023













#### PERFORMANCE OF MAJOR **LOW-COST CARRIERS**



for the week 16 - 22 February 2023



FedEx

OPERATED 52 flights/day









for the week 16 - 22 February 2023

















#### **STATES**

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



Rank evolution	Top 10 States - Week 16 - 22 Feb 2023								
over prev. Week	State	Average daily Flights (Dep/Arr)	vs previous week			% vs 2022		% vs 2019	
<b>→</b>	United Kingdom	4 571	7	+58	+1%	7	+37%	-15%	
71	Spain	3 757	71	+186	+5%	71	+23%	+0%	
2	Germany	3 571	3	-102	-3%	71	+19%	-32%	
<b>→</b>	France	3 472	<b>→</b>	+1	+0%	71	+15%	-9%	
<b>→</b>	Italy	2 692	71	+32	+1%	7	+26%	-9%	
<b>→</b>	Türkiye	2 400	3	-136	-5%	7	+35%	+10%	
<b>→</b>	Netherlands	1 320	7	+64	+5%	7	+24%	-15%	
<b>→</b>	Switzerland	1 247	71	+27	+2%	71	+23%	-9%	
<b>→</b>	Norway	1 187	71	+30	+3%	7	+15%	-12%	
<b>→</b>	Portugal	1 011	71	+39	+4%	7	+27%	+13%	

- **★ UK** is the State with the highest number of dep/arr flights on average last week (4,571 flights; +37% vs 2022) followed by **Spain** (3,757; +23%), **Germany** (3,571; +19%), **France** (3,472; +15%), **Italy** (2,692; +26%) and **Türkiye** (2,400; +35%).
- ★ In this top 10, two States are recording flight levels above 2019 levels: Portugal (+13%) and Türkiye (+10%). Spain is similar (+0%).

Within the top 10, **seven** States posted flight **increases** compared to previous week, amongst which:

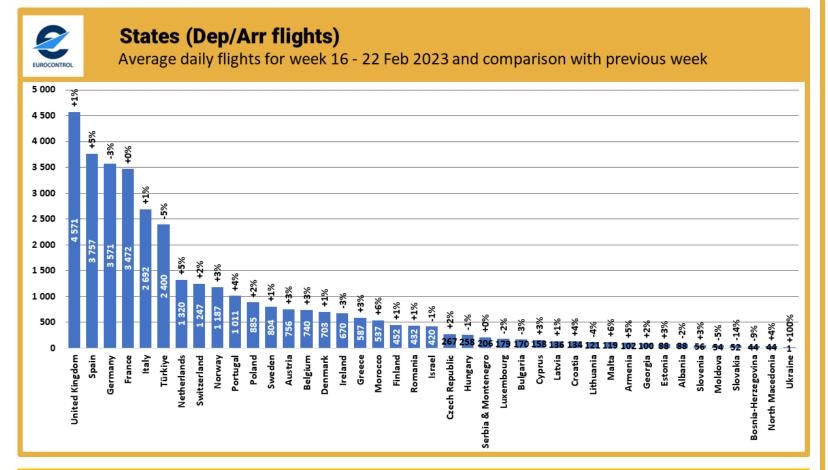
- **★ Spain** (+186 flights; +5%) mainly due to Vueling, Binter Canarias and Canarias Airlines. On domestic flows, and flows with France, the Netherlands and Germany.
- **★ Netherlands** (+64 flights; +5%) mainly due to KLM, easyJet and SAS. On flows with Spain, Italy, France and Portugal.
- ★ UK (+58 flights; +1%) mainly due to British Airways, easyJet and Emerald. Flows with Spain, the Netherlands and Germany.

#### Largest **decreases** for:

**★ Türkiye** (-136 flights; -5%) mainly due to light AOs and Turkish Airlines. Decreases on domestic flows.

#### **STATES**

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

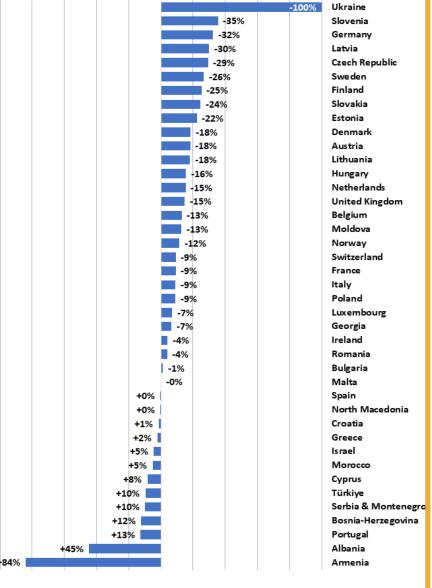


- ★ Highest increases in flights vs previous week for Spain (+5%), Netherlands (+5%), UK (+1%), Portugal (+4%), Italy (+1%) and Morocco (+6%).
- **★ Largest decreases for Türkiye** (-5%, earthquake) and **Germany** (-3%, strikes).
- ★ Traffic levels ranging from -100% (Ukraine) to +84% (Armenia), compared to 2019.

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



IFR Dep/Arr Flights for Week 16 - 22 Feb 2023

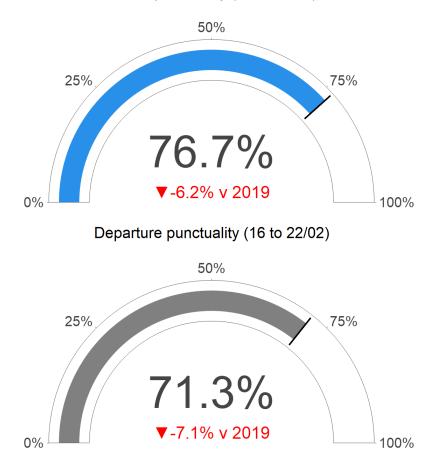


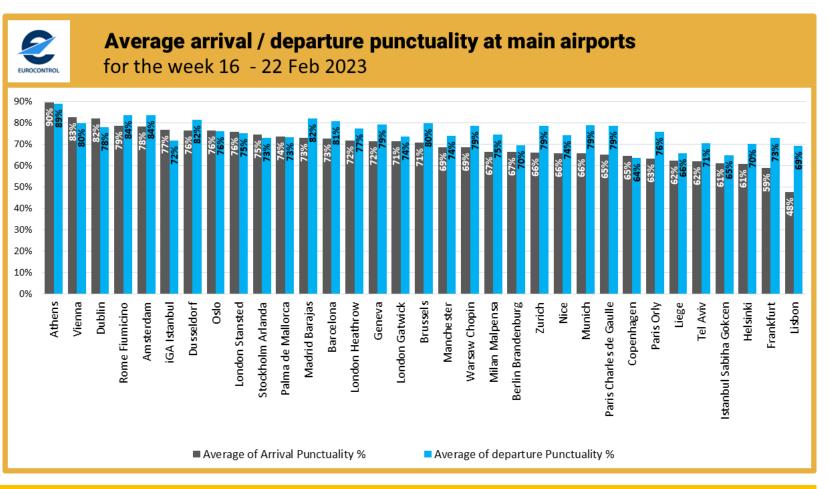
### **ARRIVAL & DEPARTURE PUNCTUALITY**



Arrival punctuality (16 to 22/02)





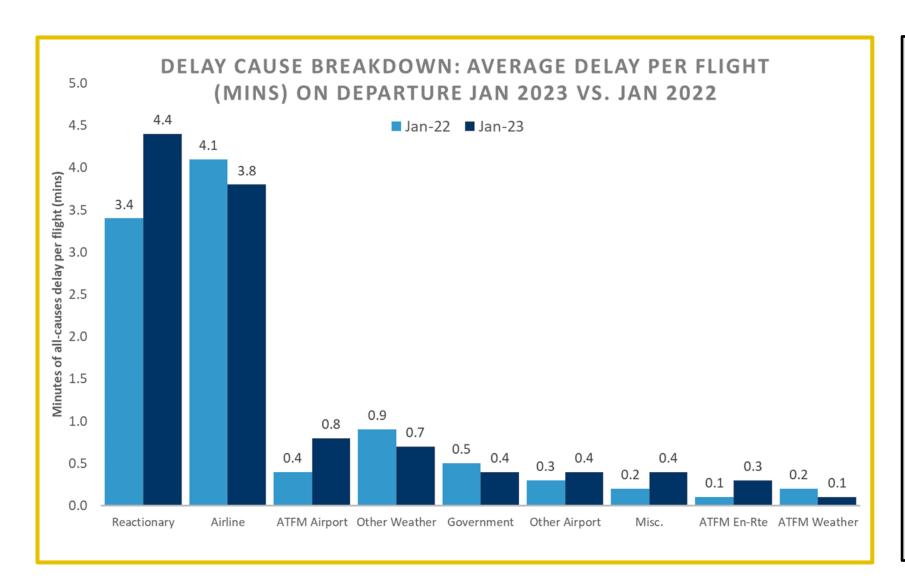


- \*\* Arrival and departure punctuality have improved slightly in the last week but are still lagging behind 2019 levels (gauge graphs).
- \*More detailed information can be found on our new daily punctuality dashboards: main link, States link and Airports link.

### **DEPARTURE PUNCTUALITY**

#### BREAKDOWN OF DELAY BY CAUSE





# All-causes delay, Jan. 2023 vs Jan. 2022:

- Average delay per flight was 11.3 minutes, a 12% increase on 2022 (average delay per flight was 10.1 minutes).
- Reactionary (knock-on delay) generated 39% of delay minutes at 4.4 mins/flight.
- **★ Airline delay** was **stable** (vs. 2022).
- ★ Winter weather an issue at London Heathrow, Amsterdam Schiphol & Istanbul Sabiha Gökçen airports

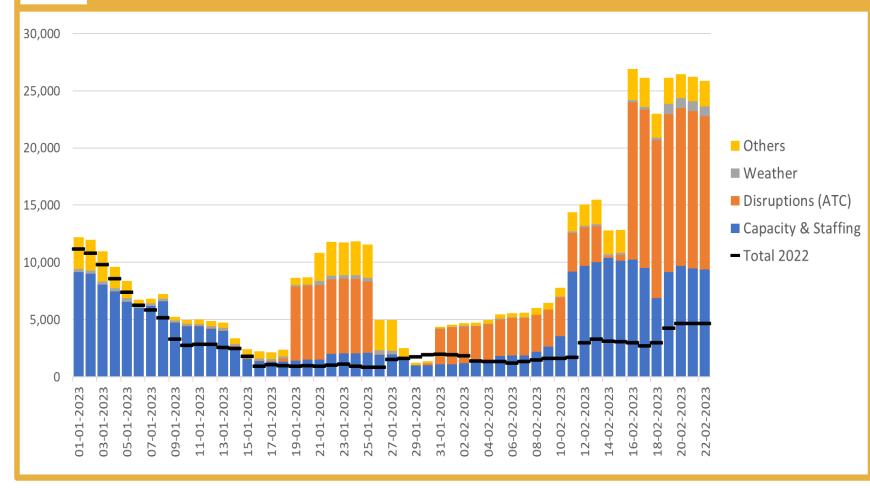
#### **EN-ROUTE ATFM DELAYS**



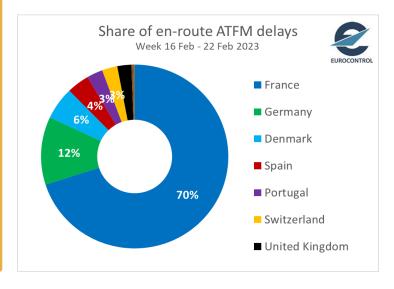


#### **En-route ATFM Delays per cause (EUROCONTROL Area)**

in minutes (7-day average) in 2023



- \*\* ATFM Delays have increased over the last two weeks, especially due to ATC industrial actions in France (15-17 February) and industrial actions in several German airports (17 February).
- ★ Major contributors over the last 7 days: France (70% of all en-route ATFM delays), Germany (12%) and Denmark (6%).

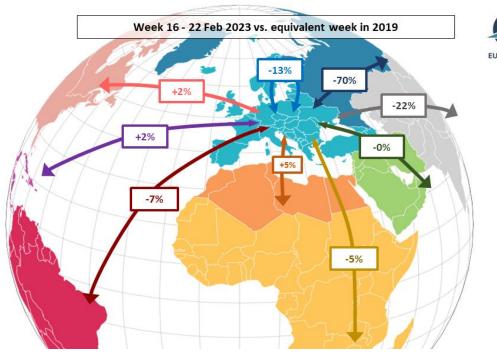


### TRAFFIC FLOWS

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



- \* The main traffic flow was intra-European with 18,032 flights on average for the most recent week, stable over the previous week.
- \* The Inter-Continental flow, recording 4,621 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 -70% compared to 2019.
- Flows between **Europe** and **Asia/Pacific** were at -22% compared to 2019, slowly recovering (were at -25% two weeks ago).
- \* Flows between **Europe** and **Middle-East** were comparable to 2019.





REGION (Average daily flights)	Week 09/02/2023 - 15/02/2023	Week 16/02/2023 - 22/02/2023	%	vs. 201
Intra-Europe	18 017	18 032	+0%	-13
Europe<->Asia/Pacific	587	589	+0%	-22
Europe<->Mid-Atlantic	197	197	-0%	+2
Europe<->Middle-East	1 272	1 278	+0%	-0
Europe<->North Atlantic	907	919	+1%	+2
Europe<->North-Africa	909	949	+4%	+5
Europe<->Other Europe	219	225	+3%	-70
Europe<->South-Atlantic	163	162	-0%	-7
Europe<->Southern Africa	301	301	-0%	-5
Non Intra-Europe	4 556	4 621	+1%	-13

### COUNTRY PAIRS - LONG HAUL FLOWS

#### (BIGGEST FLOWS TO/FROM EUROPE FOR THE LAST WEEK)



Rank evolution	Top 10 Long Haul Country-Pair on week 16 - 22 Feb 2023							
over prev. week	Country-Pair	Avg daily flights	vs previous week	% vs 2022	% vs 2019			
<b>→</b>	UK <-> US	256	<b>7</b> +4% +9	<b>7</b> +59%	-1%			
<b>→</b>	Germany <-> US	131	<b>3</b> -4% -5	7 +15%	-5%			
<b>→</b>	France <-> US	92	→ +0% +0	<b>7</b> +38%	+9%			
<b>→</b>	Netherlands <-> US	63	<b>7</b> +8% +5	7 +32%	+6%			
<b>→</b>	UAE <-> UK	55	<b>3</b> -4% -3	<b>7</b> +24%	-12%			
71	Russia <-> UAE	43	<b>7</b> +10% +4	<b>7</b> +948%	+1688%			
3	Spain <-> US	43	<b>7</b> +3% +1	<b>7</b> +30%	+5%			
7	India <-> UK	42	<b>→</b> +1% +0	<b>7</b> +80%	+7%			
7	Ireland <-> US	36	→ +0% +0	<b>7</b> +43%	-11%			
7	Germany <-> UAE	35	<b>3</b> -6% -2	<b>7</b> +5%	-26%			

★ This table presents the recovery of the flight levels between the world regions, between European States and extra-European States.

★ Russia-United Arab Emirates is included in this list as it has an impact on European overflights.

**Six** of the top 10 flows in 2022 are connecting Europe to the United States:

- **★ UK-US** is the flow with the highest number of dep/arr flights on average last week (256 flights; +59% vs 2022), followed by **Germany-US** (131; +15%), **France-US** (92; +38%) and **Netherlands-US** (63; +32%).
- **✗** In the Top 10, **five** flows have recovered to 2019 levels.

### COUNTRY PAIRS - INTRA EUROPEAN FLOWS

(AVERAGE DAILY FLIGHTS FOR THE LAST WEEK)



Rank evolution	Top 10 Country-Pairs - Week 16 - 22 Feb 2023							
over prev. week	Country-Pair	Avg daily flights	V	ous (	% vs 2022		% vs 2019	
<b>→</b>	Spain <-> Spain	1 145	7	+6%	+65	7	+23%	+6%
<b>→</b>	Türkiye <-> Türkiye	881	31	-15%	-152	7	+36%	-6%
<b>→</b>	France <-> France	828	31	-4%	-32	2	-3%	-19%
<b>→</b>	UK <-> UK	724	<b>21</b>	-4%	-27	71	+19%	-25%
<b>→</b>	Norway <-> Norway	721	71	+1%	+8	71	+7%	-6%
<b>→</b>	Italy <-> Italy	649	24	-2%	-12	71	+3%	-12%
<b>→</b>	Germany <-> Germany	535	34	-8%	-49	71	+29%	-48%
<b>→</b>	Spain <-> United Kingdom	526	71	+2%	+8	71	+28%	-4%
<b>→</b>	Germany <-> Spain	342	71	+5%	+17	71	+14%	-15%
<b>→</b>	France <-> United Kingdom	312	<b>→</b>	+0%	+1	71	+31%	-18%

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 (1,145 flights; +23% vs 2022) followed by **Türkiye-Türkiye** (881; +36%), **France-France** (828; -3%), **UK-UK** (724; +19%), **Norway-Norway** (721; +7%) and **Italy-Italy** (649; +3%).
- ★ In the Top 10, only flow has now recovered to 2019 levels: Spain. Most the other flows, being domestic, have declined, in some cases due to a switch to rail.

Within the top 10, **four** flows posted an increase over the previous week, amongst which:

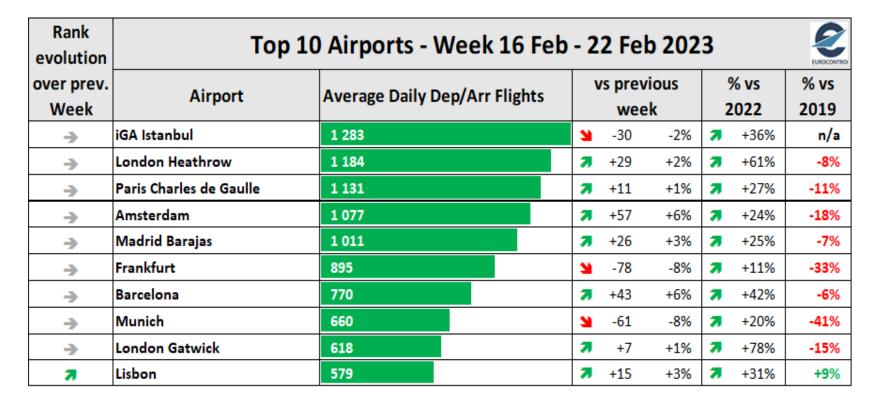
- **★ Spain-Spain** (+6%) mainly due to Binter Canarias and Vueling.
- **★ Germany-Spain** (+5%) mainly due to Eurowings and TUI.

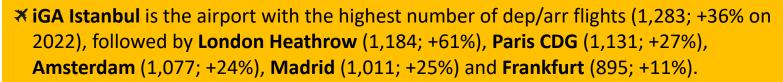
#### Decreases for:

- **★ Türkiye-Türkiye** (-15%) mainly due to Turkish Airlines and light AOs.
- **★ Germany-Germany** (-8%) mainly due to Lufthansa and light AOs.

### **AIRPORTS**

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





<sup>★</sup> In this top 10, only one airport recovered to its 2019 levels: Lisbon. iGA Istanbul Airport was only partially opened in 2019, so no comparison is possible



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

#### Main increases for:

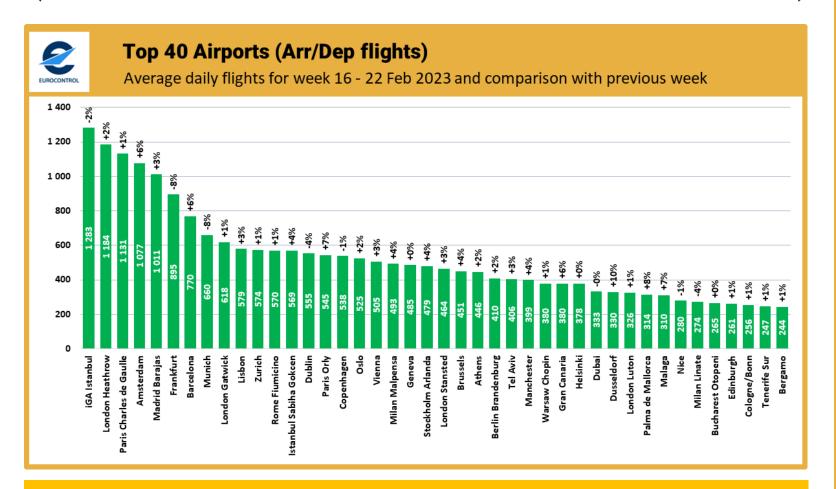
- \*Amsterdam (+57 flights; +6%) mainly due to KLM and easyJet. Increases on flows with Spain, Italy and UK.
- ★ Barcelona (+43 flights; +6%) mainly due to Vueling and light AOs. Increases on domestic flows and on flows with France, UK and Italy.

#### Decreases for:

- ★ Frankfurt (-78 flights; -8%) and Munich (-61 flights; -8%) mainly due to industrial action in Germany, affecting mainly Lufthansa and Eurowings operations.
- ★ iGA Istanbul (-30 flights; -2%) mainly due to Turkish Airlines and Corendon. Decreases on domestic flows and on flows with Germany.

#### **AIRPORTS**

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

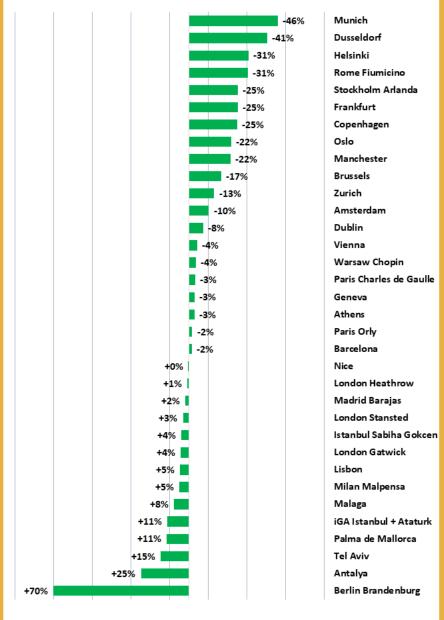


- **★** Highest increases in flights vs the previous week for **Amsterdam** (+6%), **Barcelona** (+6%), **Paris** Orly (+7%), **Düsseldorf** (+10%), **London Heathrow** (+2%) and **Madrid Barajas** (+3%).
- **★** Largest decreases (flights) for Frankfurt (-8%), Munich (-8%) and iGA Istanbul Airport (-2%).
- ★ Traffic levels ranging from -46% (Munich) to +70% (Berlin) compared to 2019.

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



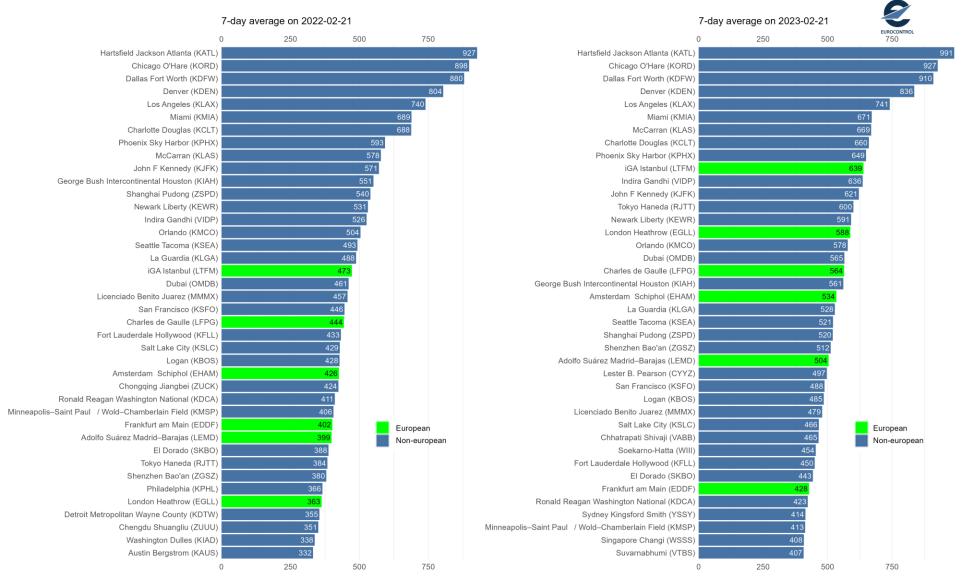
IFR Dep/Arr Flights for Week 16 - 22 Feb 2023



### **TOP 40 GLOBAL AIRPORTS**

#### (AVERAGE DAILY DEPARTURE FLIGHTS)





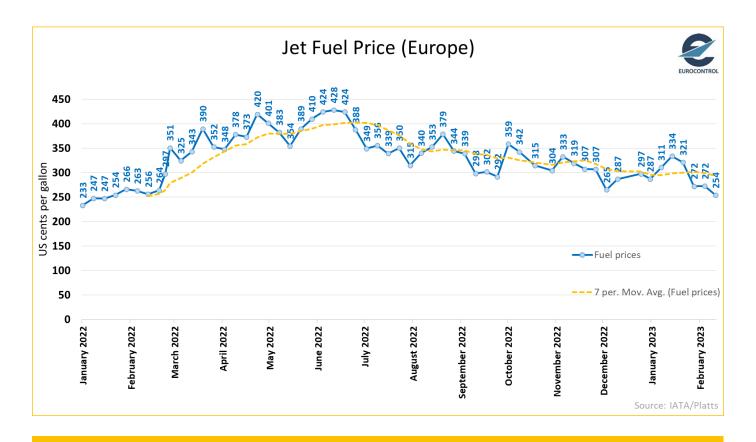
Comparing week ending 21 February 2023 (right) with the same week in 2022 (left):

- **★ 6 European airports** are ranked in the **Top 40** global airports (same airports in 2022).
- ★ The first European airport (10<sup>th</sup>) is iGA Istanbul Airport.
- \*\* Three other airports are in the Top 20: London
  Heathrow (15<sup>th</sup>), and Paris
  Charles de Gaulle (18<sup>th</sup>) and
  Amsterdam Schiphol (20<sup>th</sup>).
- ★ The first Asian airports currently are New Delhi (11<sup>th</sup>) and Tokyo Haneda (13<sup>th</sup>).

Source: Flightradar24 Historical Global Utilisation data

### **FUEL & TICKET PRICES**





- **✗ Jet fuel prices** averaged 254 cents/gallon on 17 February:
  - -7% vs. 3 February 2023;
  - +1% vs. February 2022.



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.





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