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Headlines (Week of 3 – 9 November 2022)

- The **network recorded 23,969 daily flights** on average over the past week (**-7%** on **previous week**, owing to the change to winter schedules*); 90% of 2019 levels.
- Network traffic (flights) is slightly below the base EUROCONTROL Traffic Scenario: 88% for October (vs 2019) and 88% for the first days of November. On a year-to-date basis, 2022 reaches 82.8% of 2019 levels.
- Last week traffic recorded fewer flights (Winter) compared to the previous week (Summer), having an impact on flows between North-West Europe and South Europe: **Spain-UK** (-26%), **Germany-Türkiye** (-24%), **Germany-Spain** (-18%). Amongst others, low-cost operators have indeed reduced their capacities.
- Ryanair was the busiest Aircraft operator with 2,189 flights per day on average (+11% vs 2019) over the last week, followed by Turkish Airlines (1,248; +0.4%), Lufthansa (1,129; -9%), easyJet (1,069; -18%), Air France (992; -13%), British Airways (707; -18%) and Wizz Air (655; +23%)
- Intra-European traffic is -9% below 2019 levels. Flows with US (-18%), China (-63%) and Middle-East (+11%).
- Last week, **8** of the top 10 airports posted decreases (vs previous week). Istanbul IGA is the 9th global airport.
- Arrival punctuality (within 15 min.) is ~81% while departure punctuality is ~75%, both below 2019 levels.
- In recent days, **ATFM delays** have been above 2019 levels (strikes and system implementation).
- Jet fuel prices decreased to 304 cts/gallon on 4 November (-11% over two weeks, +30% since early January).

* In this report, the week vs week is slightly distorted as we compare week 03-09 Nov 2022 (Winter sched.) with week 27 Oct-02 Nov 2022 (Summer sched.)



Traffic Situation

Average daily flights (including overflights)

On week 03 - 09 Nov 2022

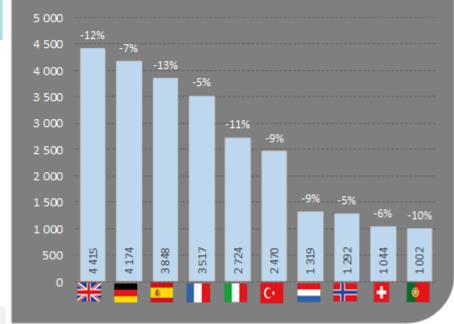
90%

of equivalent week in 2019

Top 10 Busiest States

on week 03 - 09 Nov 2022 (avg daily flights)

(Dep/Arr flights and comparison with previous week)









Market Segments

on week 03 – 09 Nov 2022 (vs 2019)

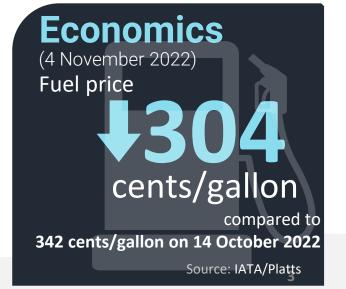


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Traffic Flow

Average daily flights on week of 03 - 09 Nov 2022

	Flights	vs previous week	vs 2019
Intra-European	18 527	-9%	-9%
Intercontinental	4 732	-3%	-16%





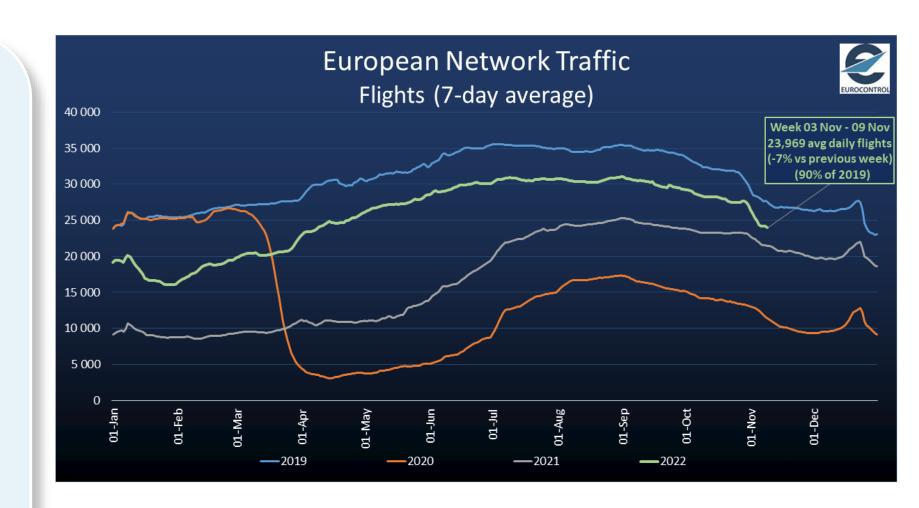
OVERALL TRAFFIC SITUATION AT NETWORK LEVEL



On week 03 – 09 November:

- **3.969** average daily flights.
- **₹ -7%** on previous week.
- **₹ 90%** of 2019 traffic levels.
- ★ Since mid-September, traffic volumes (flights) are slowly decreasing below 30,000 average daily flights.

To be noted: Over the last weeks, comparisons with 2019 are affected by the impact of comparing Summer season 2022 with Winter season 2019.

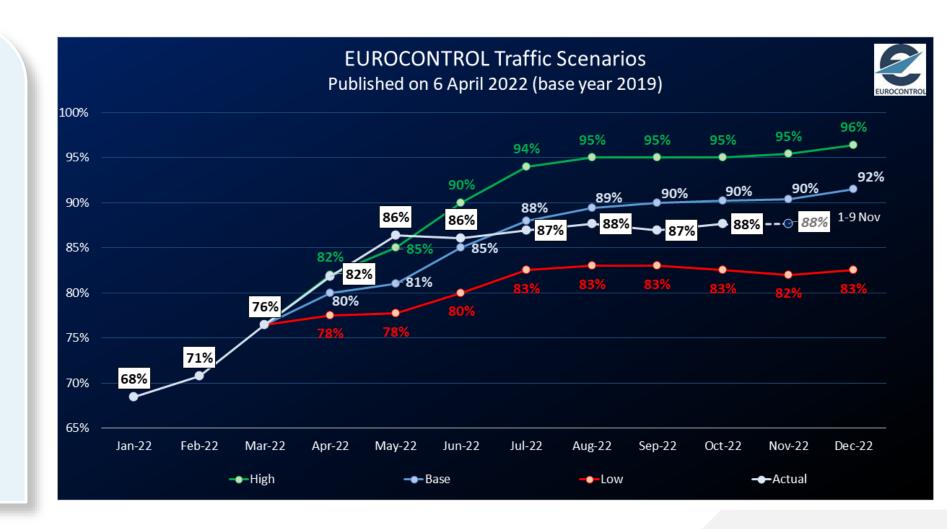




CURRENT SITUATION COMPARED TO THE LATEST EUROCONTROL TRAFFIC SCENARIOS



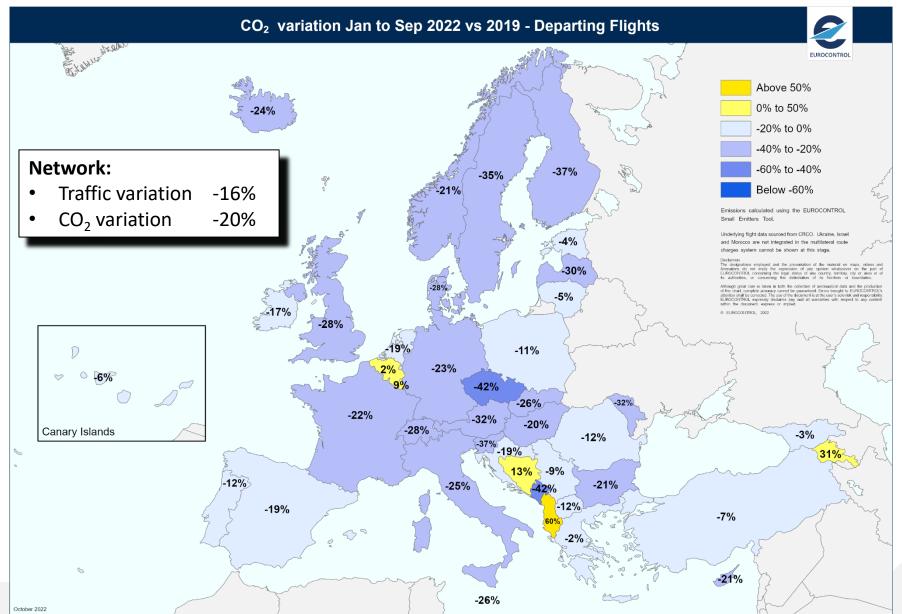
- ★ The last EUROCONTROL Traffic scenarios have been published on 6 April 2022.
- ★ Since the beginning of November, network traffic (flights) is at 88% of 2019 levels, below the base scenario.
- ★ On a year to date basis, network traffic in 2022 stands at 82.6% of 2019.





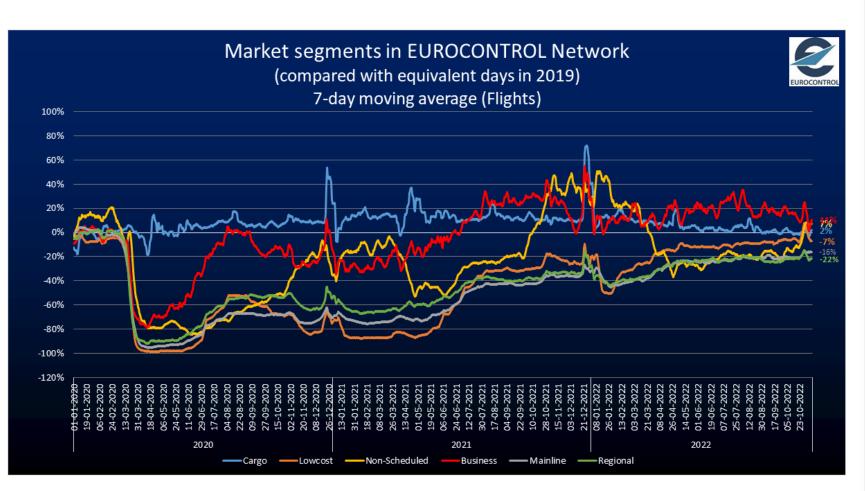
AVIATION SUSTAINABILITY











Until 9 November 2022, compared to 2019:

- ★Three segments are above 2019 levels: Business Aviation (+11%), All-cargo (+2%) and Non-scheduled (+7%).
- **★Low-Cost** (-7% vs 2019) recently dipped below 2019 levels owing to the shift to the Winter schedules.
- ★ Mainline (-16%) and Regional (-22%) have been recovering since the beginning of 2022 but are now stable since July (vs 2019).

Note: the "peaks" observed late October are mainly an "artefact" related to the start of the IATA Winter Season Schedules (30 October 2022), slightly later than in 2019 (the winter schedule started on 27 October 2019).



AIRCRAFT OPERATORS (AVERAGE DAILY FLIGHTS FOR THE LAST WEEK)

Top 10 Aircraft	Week (03 - 09 Nov 2022)				
Operators	Average flights per day	% vs 2019			
FRYANAIR	2 189	+11%	-12%		
TURKISH AIRLINES	1 248	+0%	+1%		
	1 129	-9%	-3%		
easyJet	1 069	-18%	-25%		
AIRFRANCE /	992	-13%	-1%		
BRITISH AIRWAYS	707	-18%	-1%		
W <u>y</u> oz	655	+23%	-10%		
KLIMI Royal Outch Artines	630	-18%	-12%		
Scandinavian Airlines	595	-30%	-2%		
vueling	478	-3%	-16%		

- ★ Ryanair is the busiest Aircraft Operator with 2,189 flights per day on average (+11% vs 2019) over last week, followed by Turkish Airlines (1,248; +0%), Lufthansa (1,129; -18%), easyJet (1,069; -18%), Air France (992; -13%), British Airways (707; -18%) and Wizz Air (655; +23%).
- **≭ easyJet** moved down to the 4th rank and **British Airways** moved up to the 6th rank compared to the previous weeks.

Within the top 10, all but one airline posted decreases over the previous week:

- **★ easyJet** (-364 flights; -25%) mainly due to flows between UK and Spain, Greece and France as well as domestic flows in UK, Italy and France.
- ★ Ryanair (-302 flights; -12%) mainly due to domestic flows in Italy and flows between Spain and UK, Germany, and Italy.
- ★ Vueling (-92 flights; -3%) mainly due to decreases on domestic flow in Spain, as well as flows between Spain and France, UK and Italy.

Only one increase for:

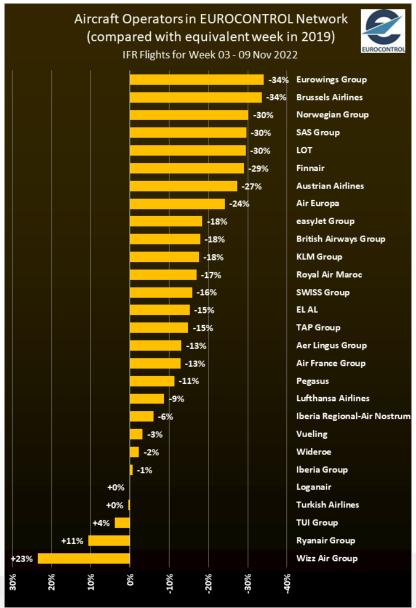
★ Turkish Airlines (+18 flights; +1%) mainly due to domestic flows in Türkiye as well as flows between Türkiye and Italy, Saudi Arabia and Thaïland.



AIRCRAFT OPERATORS (AVERAGE DAILY FLIGHTS FOR THE LAST WEEK)

Rank evolution over 1 week	Top 10 Aircraft Operators - Week 03 - 09 Nov 2022							
	Aircraft Operator	Average daily flights		ver 1 eek	% over 1 week	% v	s 2019	
→	Ryanair Group	2 189	20	-302	-12%	71	+11%	
71	Turkish Airlines	1 248	71	+18	+1%	→	+0%	
71	Lufthansa Airlines	1 129	34	-34	-3%	24	-9%	
2	easyJet Group	1 069	24	-364	-25%	21	-18%	
→	Air France Group	992	24	-11	-1%	31	-13%	
71	British Airways Group	707	24	-6	-1%	21	-18%	
	Wizz Air Group	655	24	-69	-10%	71	+23%	
→	KLM Group	630	34	-83	-12%	21	-18%	
→	SAS Group	595	<u>**</u>	-13	-2%	31	-30%	
->	Vueling	478	<u> </u>	-92	-16%	99	-3%	

- ** Largest decreases in flights vs previous week, mainly explained by the change in schedules' season for easyJet (-25%), Ryanair (-12%), Jet2.com (-47%), TUI Group (-33%), Vueling (-16%), KLM (-12%), Wizz Air (-10%, and Eurowings (-15%).
- **★** Highest increases for **DHL Group** (+9%) and **Turkish Airlines** (+1%).
- **★** Traffic levels ranging from -34% (**Eurowings**) to +23% (**Wizz Air**) vs 2019.



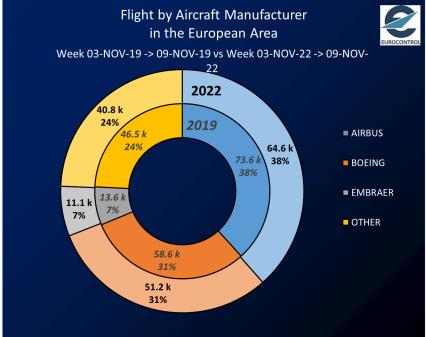




AIRCRAFT MANUFACTURERS (SHARE OF FLIGHTS FOR THE LAST WEEK)
Flights of the top 20 Aircraft operators

Flight by Aircraft Manufact





- *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 aircraft operators, Airbus share was 53% and Boeing share was 33%.



AIRCRAFT OPERATORS (AVERAGE DAILY FLIGHTS FOR THE LAST WEEK) Cargo, Legacy, Low Cost and Regional Carriers



PERFORMANCE OF MAJOR CARGO CARRIERS

EUROCONTROL

for the week 3 - 9 November 2022









PERFORMANCE OF MAJOR LOW-COST CARRIERS



for the week 3 - 9 November 2022













PERFORMANCE OF MAJOR LONG-HAUL/LEGACY CARRIERS

for the week 3 - 9 November 2022













PERFORMANCE OF MAJOR REGIONAL CARRIERS*



for the week 3 - 9 November 2022







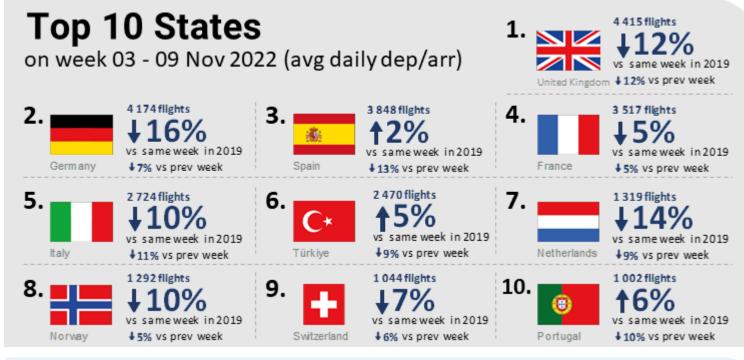








STATES (AVERAGE DAILY DEPARTURE/ARRIVAL FLIGHTS FOR THE LAST WEEK)



- **★UK** is the State with the highest number of dep/arr flights on average over last week (4,415; -12% vs 2019) followed by **Germany** (4,174; -16%), **Spain** (3,848; +2%), **France** (3,517; -5%), **Italy** (2,724; -10%) and **Türkiye** (2,470; +5%).
- **★** In this top 10, **Spain** (+3%), **Turkey** (+1%) and **Portugal** (+6%) are the only States having exceeded their 2019 traffic volumes.
- **★**Switzerland (9th) has moved into the top 10 compared to 2 weeks ago.

Within the top 10, **all** States posted flight decreases over the previous week, owing to the change in schedules' season between the two weeks:

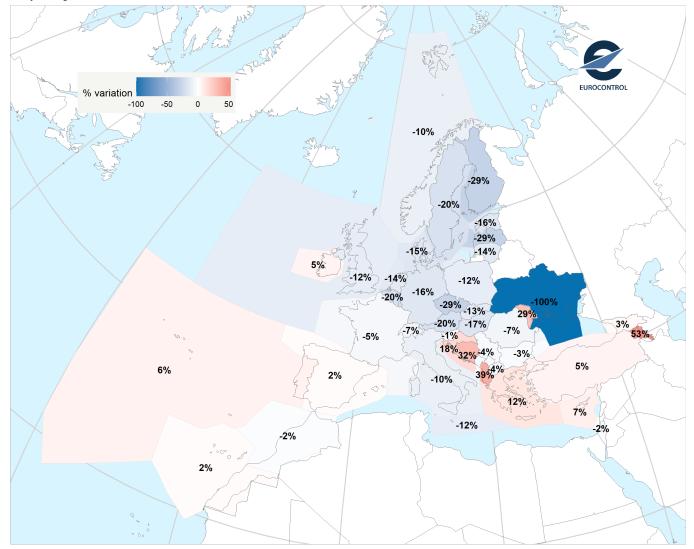
- **★UK** (-587 flights; -12%) mainly due to low-cost airlines (easyJet, Jet2, TUI, Ryanair). Mainly domestic flows and flows with Spain, Greece, Türkiye, Italy and France.
- **★ Spain** (-557 flights; -13%) mainly due to low-cost airlines (Ryanair, Vueling, easyJet). Flows with UK, Germany, France and Italy as well as domestic flows.
- **★ Italy** (-349 flights; -11%) mainly due to low-cost airlines. Domestic flows and flows with UK, France, Germany and Spain.
- **★Greece** (-342 flights; -33%) mainly due low-cost airlines. Domestic flows and flows with UK, Germany and France.



STATES (AVERAGE DAILY DEPARTURE/ARRIVAL FLIGHTS FOR THE LAST WEEK) State FIR daily % arrivals/departures variation vs 2019 on 2022-11-09



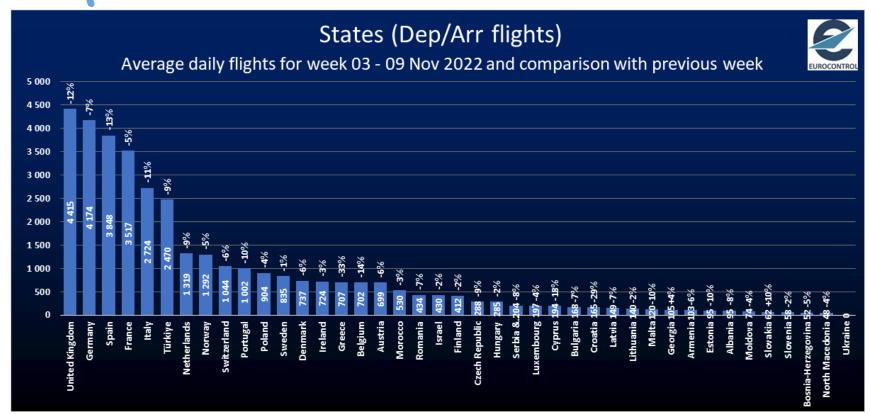
7-day average - FIRs at altitude FL200





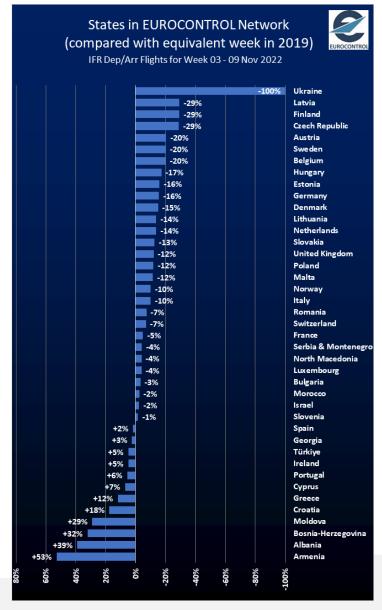








- ★ Highest (small) increases for Slovakia (+10%) and Georgia (+4%).
- ★ Traffic levels ranging from -100% (Ukraine) to +53% (Armenia), compared to 2019.

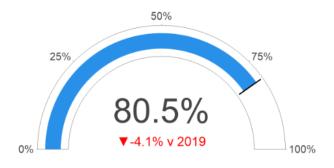






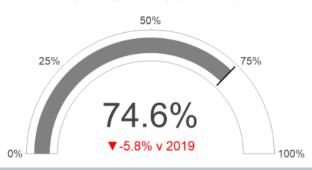


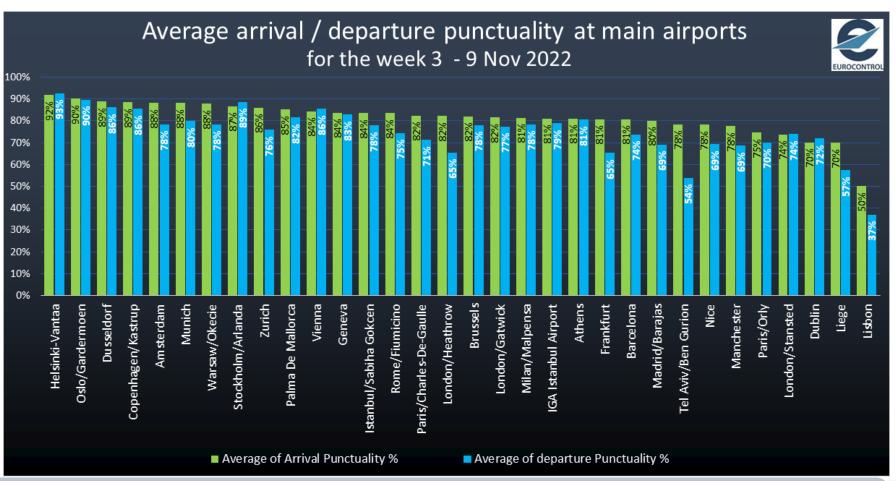
Arrival punctuality (03 to 09/11)



Departure Punctuality (last week)

Departure punctuality (03 to 09/11)

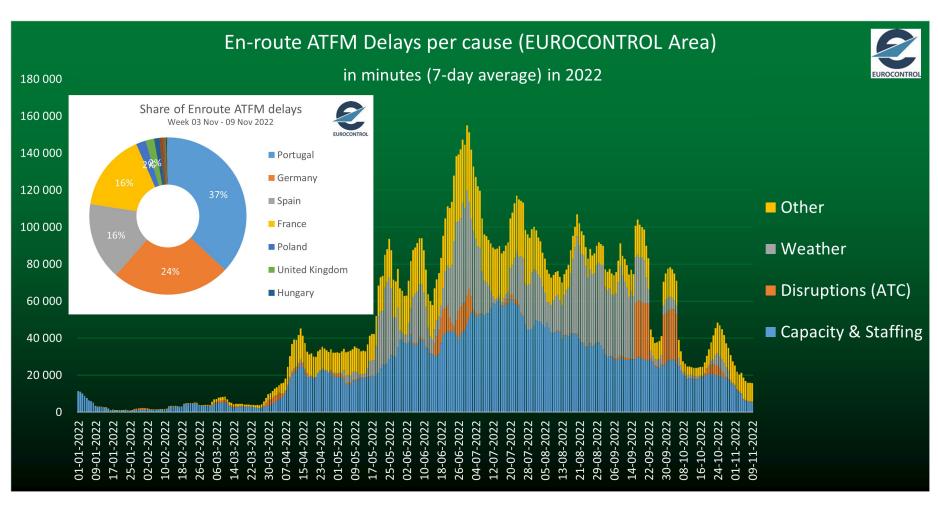




- *Arrival and departure punctuality have improved slightly since the Summer but are still lagging behind 2019 levels.
- **★** More detailed information be found on our new daily punctuality dashboards: main link, States link and Airports link.







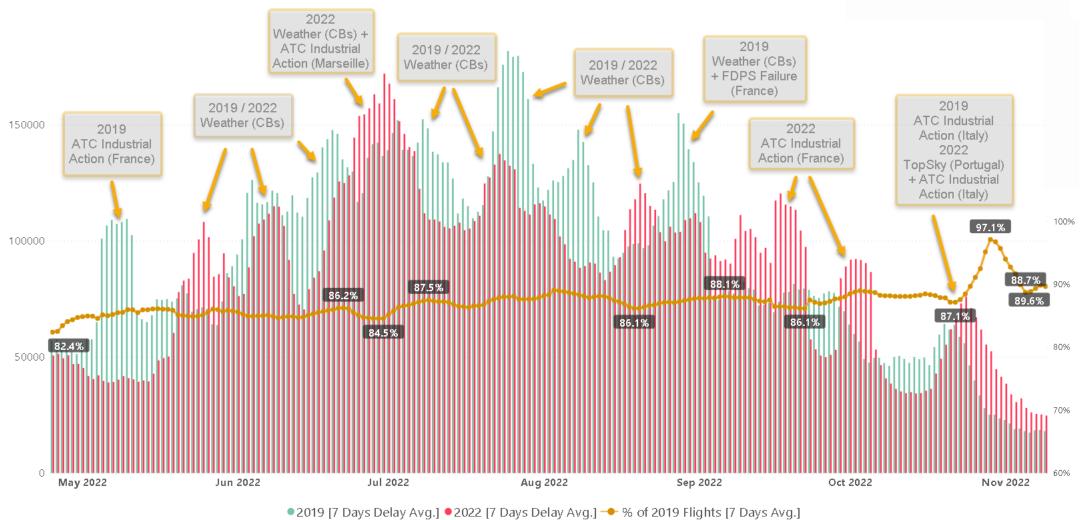
- *Average en-route ATFM delays over the last week (03 09 Nov) have been above 2019 levels owing to two industrial actions (general strikes Belgium and Greece) and system implementation (Portugal, see next slide).
- ★ Major contributors over the last 7 days: Portugal (37% of all en-route ATFM delays), Germany (24%), Spain (16%) France (16%) and Poland (2%).





EUROCONTROL

2019 and 2022 (7-day average)



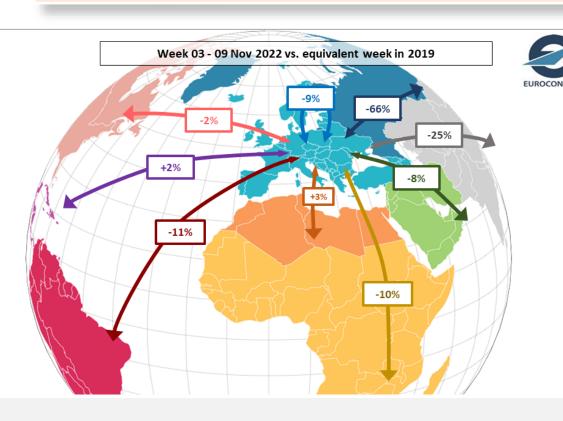


LAST WEEK)

TRAFFIC FLOWS (AVERAGE DAILY DEPARTURE/ARRIVAL FLIGHTS FOR THE



- *The main traffic flow is the intra-Europe flow with 18,527 flights on average for the most recent week, -9% over the previous week.
- ** Flows between **Europe** and Other Europe (incl. **Russia**) are at -66% compared to 2019.
- ** Flows between **Europe** and **Asia/Pacific** are at -25% 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 -9% below 2019 levels while **intercontinental** flows are at -16%.



REGION (Average daily flights)	Week 27/10/2022 - 02/11/2022	Week 03/11/2022 - 09/11/2022	%
Intra-Europe	20 270	18 527	-9 %
Europe<->Asia/Pacific	576	594	+3%
Europe<->Mid-Atlantic	171	173	+1%
Europe<->Middle-East	1 249	1 229	-2%
Europe<->North Atlantic	1 087	988	- 9 %
Europe<->North-Africa	1 037	1 006	-3%
Europe<->Other Europe	325	288	-11%
Europe<->South-Atlantic	155	160	+3%
Europe<->Southern Africa	289	294	+2%
Non Intra-Europe	4 889	4 732	-3 %

vs. 201 9
-9%
-25%
+2%
-8%
-2%
+3%
-66%
-11%
-10%
-16%



OUTSIDE EUROPE: SITUATION IN CHINA OVER THE 2019-2022 PERIOD EUROCONTROL

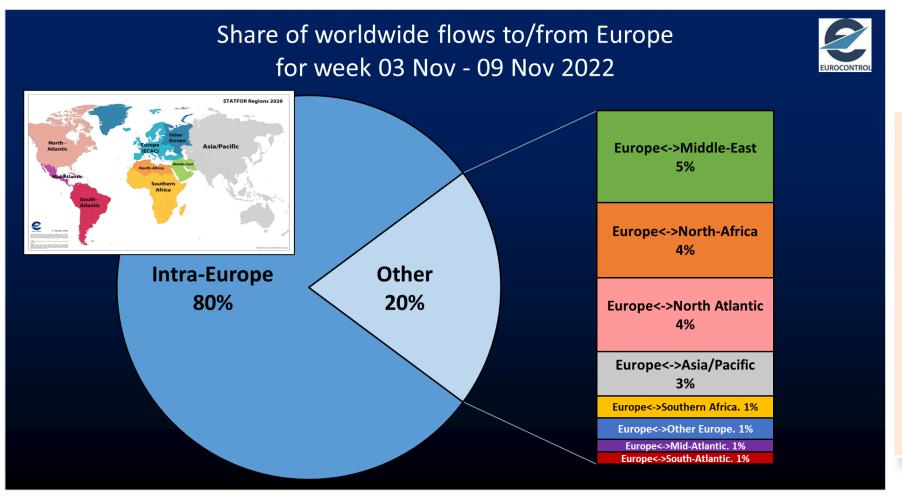
- **★** Owing to the strict implementation of a zero-COVID-19 policy, China recorded a series of peaks and troughs vis-àvis its number of domestic flights since 2020. In 2022, after a progressive recovery in July, traffic levels have collapsed again at less than 5,000 daily flights, showing a 61% decline on 7 Nov. 2022 (vs 1 Jan 2020).
- **★** It has been nearly three years the international flights stagnated, recording 1,143 flights early November (-72% compared to 1 Jan 2020). Overflights remained suppressed too with 843 flights (-47% vs. 1 Jan 2020).







TRAFFIC FLOWS (SHARE OF FLOWS TO/FROM EUROPE FOR THE

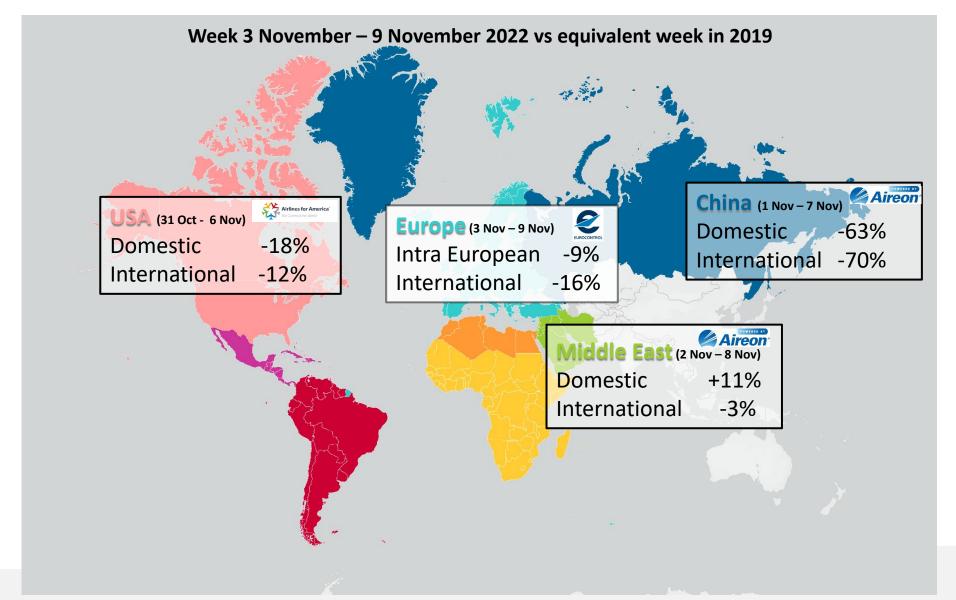


- **X**Over the last week, Intra-**European** flights represented 80% of the total traffic.
- **★**The first flow busiest partner with Europe is **Middle-East** (5%) followed by North Africa and North Atlantic (4%, each).
- **★Asia/Pacific** is the 4th busiest partner with 3%.



OUTSIDE EUROPE (TRAFFIC SITUATION OVER THE LAST WEEK VS 2019)







COUNTRY PAIRS (AVERAGE DAILY FLIGHTS FOR THE LAST WEEK)



Top	1	0
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Rank evolution	Top 10 Country-Pair on week 03 - 09 Nov 2022						
over prev. week	Country-Pair	Avg daily flights		s prev. veek	% vs prev. week	% v	s 2019
→	Spain <-> Spain	1 110	<u> </u>	-78	-7%	→	-0%
71	France <-> France	871	71	+51	+6%	21	-12%
<u>9</u>	Norway <-> Norway	799	24	-35	-4%	21	-5%
→	United Kingdom <-> United Kingdo	775	24	-34	-4%	21	-22%
→	Türkiye <-> Türkiye	757	71	+2	+0%	21	-14%
→	Italy <-> Italy	684	24	-58	-8%	21	-8%
71	Germany <-> Germany	645	71	+34	+5%	21	-25%
<u>9</u>	Spain <-> United Kingdom	537	24	-193	-26%	71	+3%
→	Germany <-> Spain	390	2	-88	-18%	71	+4%
71	Germany <-> United Kingdom	304	71	+6	+2%	21	-19%

Seven of the top 10 flows are domestic.

★Spain-Spain is the country-pair with the highest number of dep/arr flights (1,110) followed by **France-France** (871), **Norway-Norway** (799), **UK-UK** (775), **Türkiye-Türkiye** (757), **Italy-Italy** (684) and **Germany-Germany** (645).

Within the top 10, **six** flows posted a decrease over the previous week for, main due to the switch to Winter schedules:

- **★ Spain-UK** (-193 flights; -26%) mainly due to low-cost airlines (easyJet, Jet2, Ryanair).
- **★Germany-Spain** (-88 flights; -18%) mainly due to Eurowings, Ryanair and Lufthansa.
- **★ Spain-Spain** (-78 flights; -7%) mainly due to Vueling, Ryanair and Iberia.

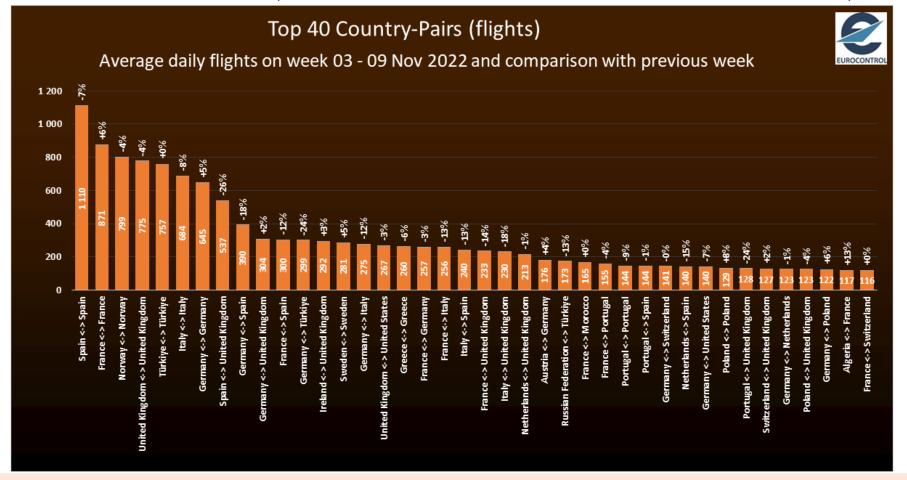
Some increases for:

- **★ France-France** (+51 flights; +6%) mainly due to Air France and Air Corsica.
- **★Germany-Germany** (+34 flights; +5%) mainly due to liaght AOs, Lufthansa and Eurowings.





COUNTRY PAIRS (AVERAGE DAILY FLIGHTS FOR THE LAST WEEK)



- **★** Largest decreases in flights vs previous week for **Spain-UK** (-26%), **Germany-Türkiye** (-24%), **Germany-Spain** (-18%), **Spain-Spain** (-7%), **Italy-Italy** (-8%), **Italy-UK** (-18%), and **France-Spain** (-12%).
- ★ Highest increases in flights vs previous week for France-France (+6%), Germany-Germany (+5%), Sweden-Sweden (+5%) and Algeria-France (+13%).





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

Top 10

Rank evolution	Top 10 Airports on week 03 Nov - 09 Nov 2022							
over prev. Week	Airport	Average Daily Dep/Arr Flights	∆ over prev. week	% over prev. week	% vs 2019			
→	IGA Istanbul Airport	1 232	77 +38	+3%	₹ +6%			
71	London/Heathrow	1 157	71 +9	+1%	-9%			
24	Paris/Charles-De-Gaulle	1 147	-34	-3%	-11%			
71	Frankfurt	1 092	> -47	-4%	-10%			
2	Amsterdam	1 075	-92	-8%	-17%			
→	Madrid/Barajas	1 014	<u>></u> -3	-0%	-10%			
→	Munich	808	> -43	-5%	-19%			
→	Barcelona	744	-83	-10%	-10%			
71	Dublin	596	-20	-3%	77 +7%			
71	Oslo/Gardermoen	577	-38	-6%	-16%			

- **★IGA Istanbul** is the airport with the highest number of dep/arr flights (1,232) followed by **London Heathrow** (1,157), **Paris CDG** (1,147), **Frankfurt** (1,092) and **Amsterdam** (1,075).
- **★IGA Istanbul** is the busiest airport in Europe, recording flights close to 2019 levels. **Dublin** is the only other airport in the top 10 exceeding 2019 levels (+7%). Palma de Mallorca exited the Top 10.

Within the top 10, **eight** airports posted **decreases** over the previous week, notably owing to the change in schedules, highest being:

- * Amsterdam (-92 flights; -8%) mainly due to KLM and LCC operators. Flows with Spain, Italy and Greece.
- ★ Barcelona (-83 flights; -10%) mainly due to Vueling, easyJet and Ryanair. On domestic flows and flows with Italy and UK.
- ★ Frankfurt (-47 flights; -4%) mainly due to Lufthansa and Condor. On flows with Greece, Türkiye and Spain.

Increase for

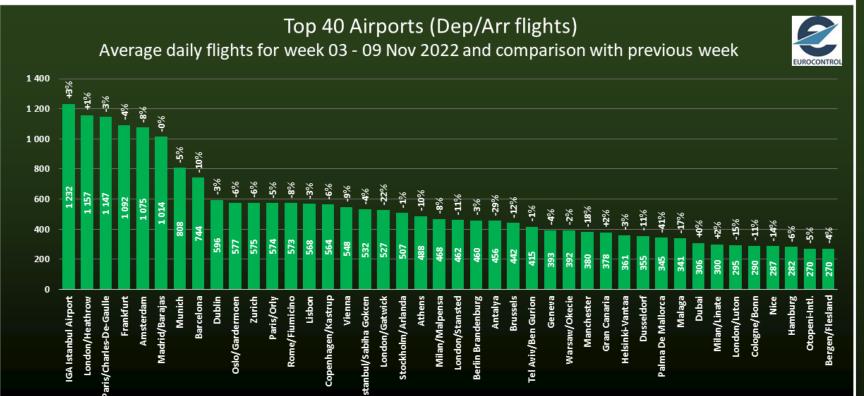
★ Istanbul IGA (+38 flights; +3%) mainly due to Turkish Airlines. On domestic flows as well as various flows (from/to India, Serbia, Spain, Israel...).



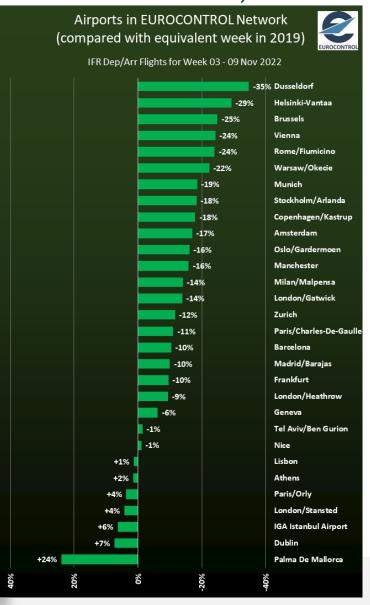


AIRPORTS (AVERAGE DAILY DEPARTURE/ARRIVAL FLIGHTS FOR THE LAST WEEK)

Top 40



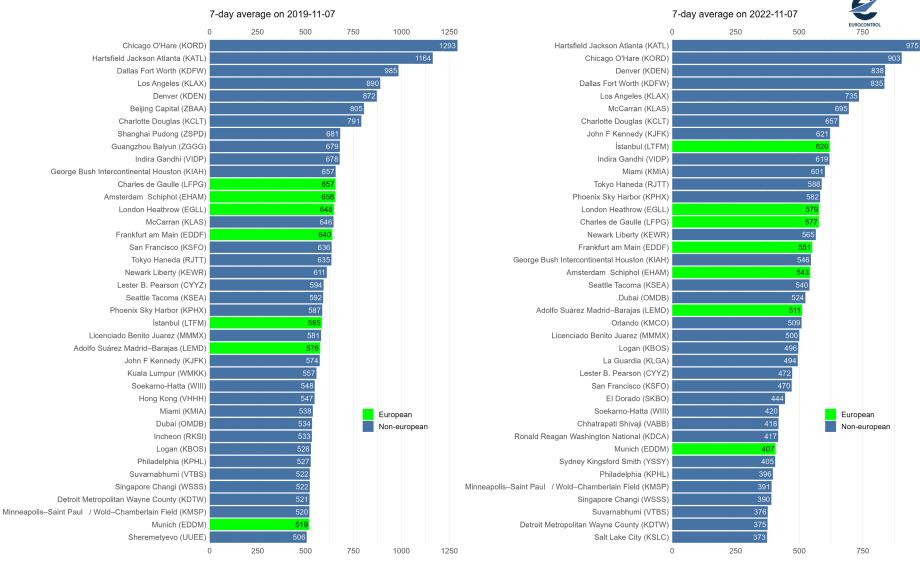
- ** Largest decreases in flights vs the previous week for Palma de Mallorca (-41%), Antalya (-29%), London Gatwick (-22%), Amsterdam (-8%) and Manchester (-18%).
- **★** Highest increase for **Istanbul IGA** (+3%) and **London Heathrow** (+1%).
- ★ Traffic levels ranging from -35% (Düsseldorf) to +24% (Palma de M.) compared to 2019.







TOP 40 GLOBAL AIRPORTS (AVERAGE DAILY DEPARTURE FLIGHTS)



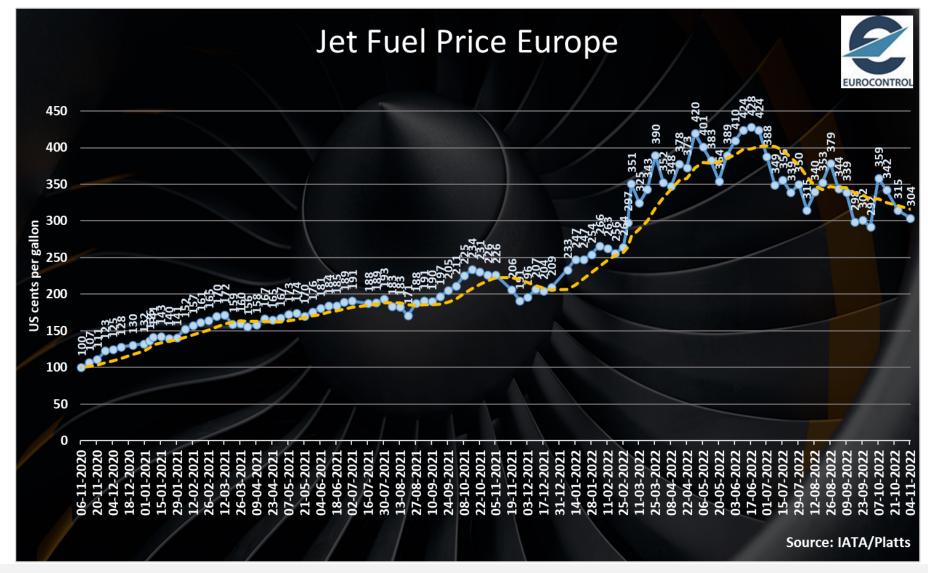
Comparing week ending 7 November (right) with the same week in 2019 (left):

- ★7 European airports are ranked in the Top 40 global airports (vs 7 in 2019)
- **★One European airport** is in the Top 10: **Istanbul IGA** (9th).
- ★Two additional airports: Paris CDG and London Heathrow belong to the Top 15.
- ★Ten of the Top 15 global airports are currently based in the US.
- ★The first Asian airport in 2022 is New Delhi (10th).

Source: Flightradar24 Historical Global Utilisation data







- ★ Jet fuel prices dropped to 304 cts/gallon on 4 November.
 - -11% over two weeks;
 - +30% vs early January.

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 aviation.intelligence@eurocontrol.int





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