18 August 2022

EUROCONTROL

Comprehensive Assessment

EUROPEAN AVIATION

SUPPORTING EUROPEAN AVIATION

Headlines (Week of 11 – 17 August 2022)

- **30,242 daily flights** on average over past week **(stable** on **previous week)**; 87% of 2019 levels.
- **Traffic slightly below** the **base EUROCONTROL Traffic Scenarios** (6 Apr 22): 88% for July vs 2019 so far.
- **Low-Cost** airlines have been driving the summer growth, standing currently at 91% of 2019 levels while **Mainline** and **Regional** operators are at 79% and 80% (respectively).
- **Ryanair** was the busiest aircraft operator last week with 3,015 flights per day on average (**+15%** vs 2019), followed by **easyJet** (1,631; -14% vs 2019), **Turkish Airlines** (1,491; -1% vs 2019), **Lufthansa** (1,203; -20% vs 2019), **Air France** (1,067; -10% vs 2019), **Wizz Air** (818; +20% vs 2019) and **KLM** (770; -18% vs 2019).
- Domestic traffic vs 2019: Europe (-10%), USA (-17%), China (-20% improving) and Middle-East (+6%).
- **Two** European airports (**IGA Istanbul** and **Paris/CDG**) are in the Top 10 Global airports.
- **Arrival punctuality** (within 15 minutes) is at **67%** while **departure punctuality** is at **59%**.
- **En-route ATFM delays** have started to rise since mid May 2022, reaching 2019 levels at 3 occasions. Very recent days **comparable to 2019 levels, owing to an increase of weather disruptions**.
- **Jet fuel prices decreased** to **340 cts/gallon** on 12 August (-3% over two weeks, **+46% since early January**).

Traffic Situation

EUROCONTROL

Average daily flights (including overflights)

On week 11 - 17 Aug 2022

87% of equivalent week in 2019

Top 10 Aircraft Operators

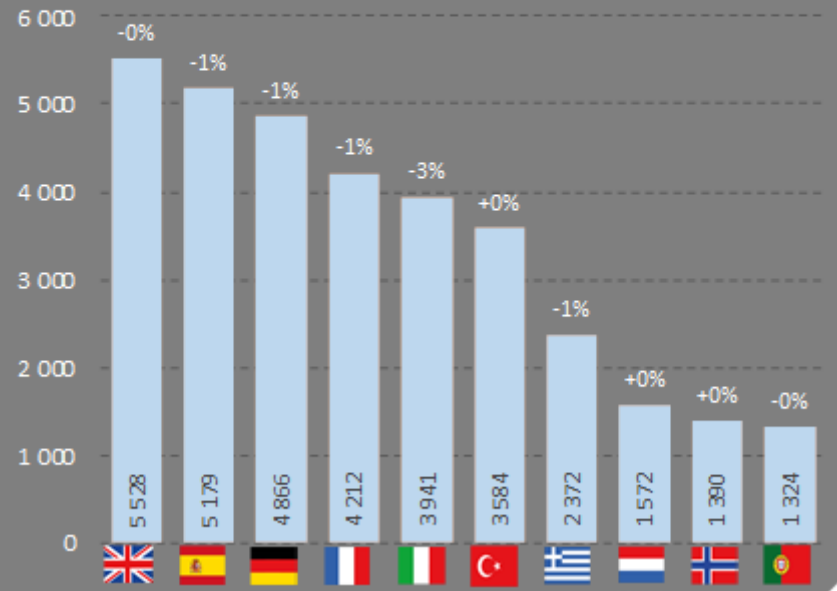
on Week 11 - 17 Aug 2022 (avg daily flights)

1. Ryanair Group — Operated 3 015 flights ↑15% vs same week in 2019 ↑0% vs prev week
2. easyJet Group — Operated 1 631 flights ↓14% vs same week in 2019 ↓1% vs prev week
3. Turkish Airlines — Operated 1 491 flights ↓1% vs same week in 2019 ↓0% vs prev week
4. Lufthansa Airlines — Operated 1 203 flights ↓20% vs same week in 2019 ↑0% vs prev week
5. Air France Group — Operated 1 067 flights ↓10% vs same week in 2019 ↓0% vs prev week
6. Wizz Air Group — Operated 818 flights ↑20% vs same week in 2019 ↑0% vs prev week
7. KLM Group — Operated 770 flights ↓18% vs same week in 2019 ↓1% vs prev week
8. Vueling — Operated 708 flights ↓4% vs same week in 2019 ↓1% vs prev week
9. British Airways Grp — Operated 699 flights ↓29% vs same week in 2019 ↑0% vs prev week
10. SAS Group — Operated 578 flights ↓31% vs same week in 2019 ↑2% vs prev week

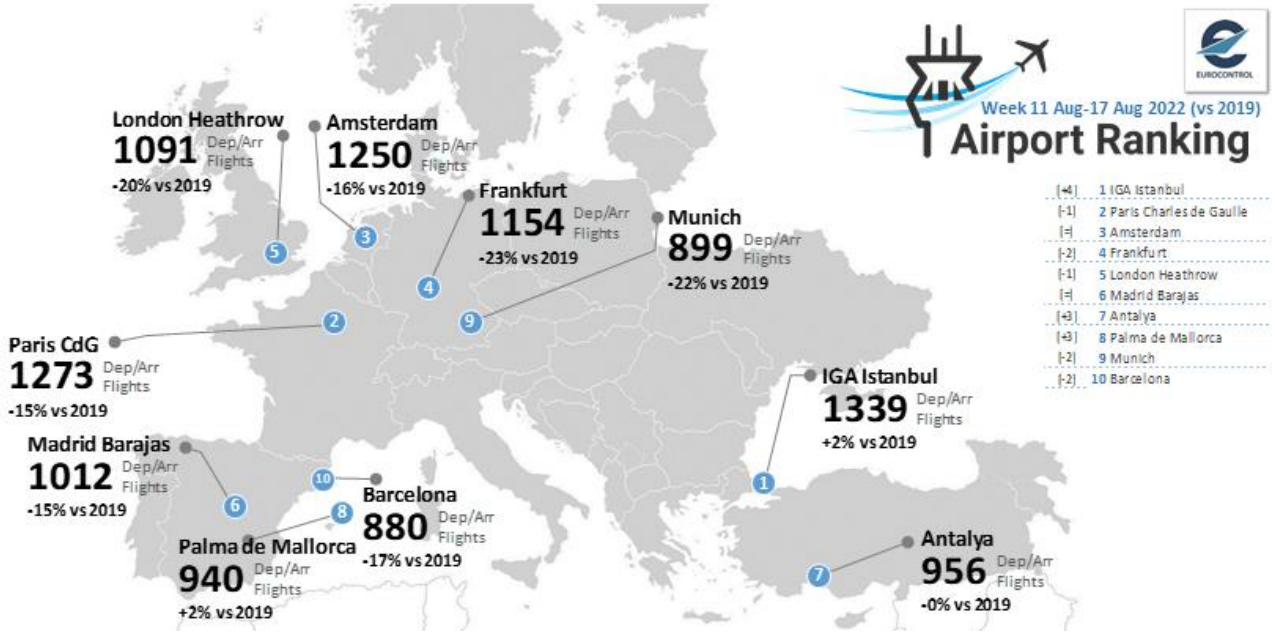
Top 10 Busiest States

on week 11 - 17 Aug 2022 (avg daily flights)

(Dep/Arr flights and comparison with previous week)

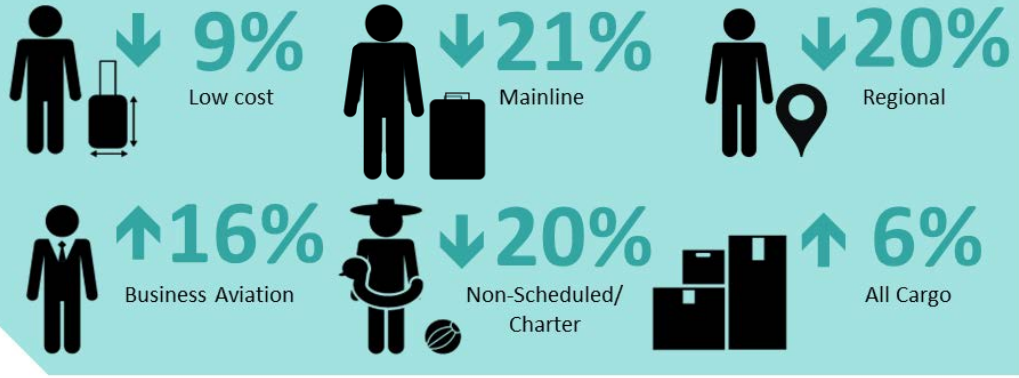


Top 10 Busiest Airports, Flows, Market segments & Fuel prices



Market Segments

on week 11 – 17 Aug 2022 (vs 2019)



Traffic Flow

Average daily flights on week of 11 - 17 Aug 2022

	Flights	vs previous week	vs 2019
Intra-European	24 023	-1%	-10%
Intercontinental	5 519	-0%	-24%

Route charges

(July 2022)

Amount billed:

€ 800 million

Jan-Jul 2022 amount billed:

€ 4,192 million

vs. Jan-Jul 2019

↓ -8%

Source: EUROCONTROL

Economics

(12 August 2022)

Fuel price

↓340

cents/gallon

compared to

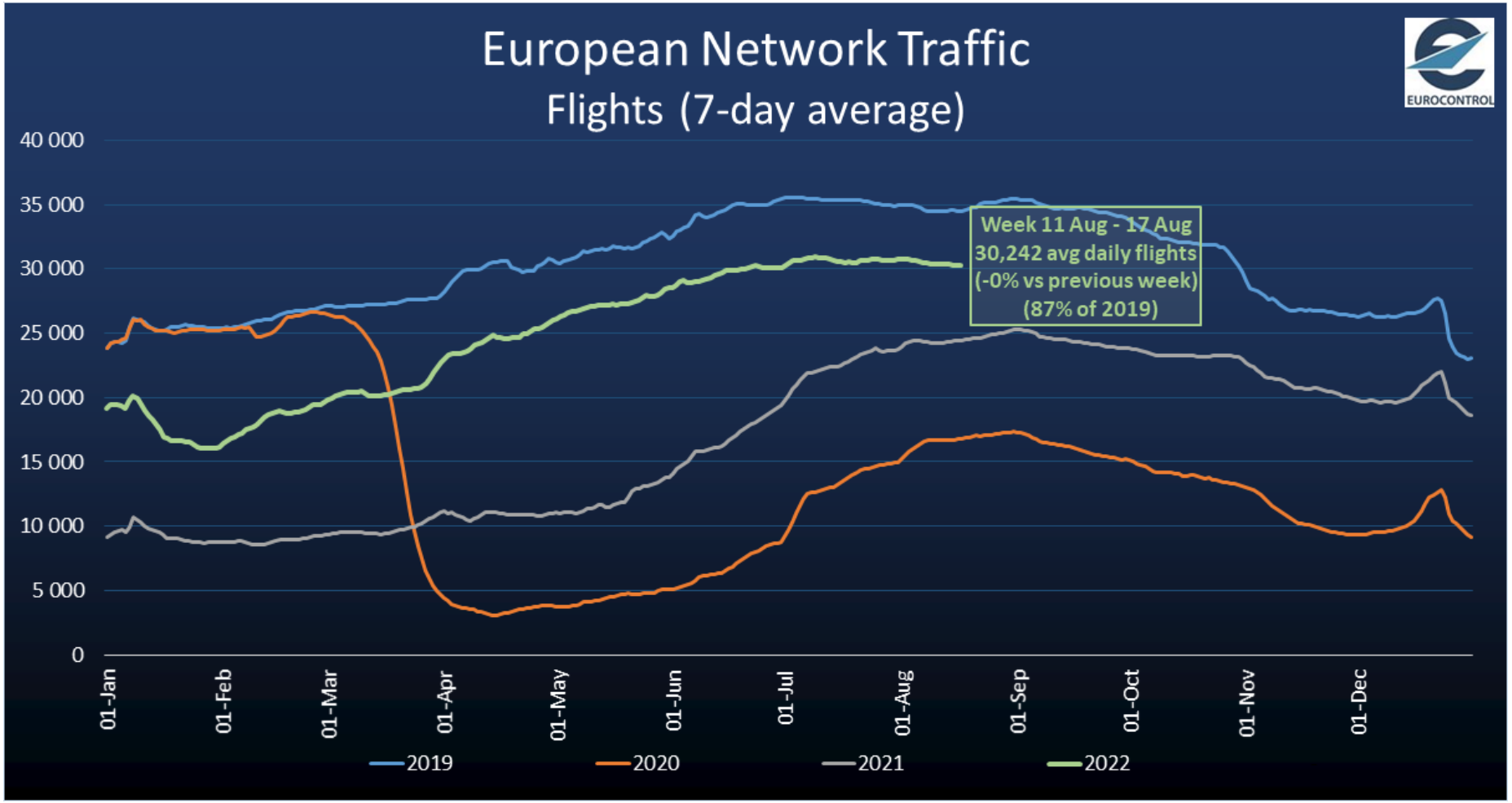
350 cents/gallon on 29 July 2022

Source: IATA/Platts

Overall traffic situation at network level

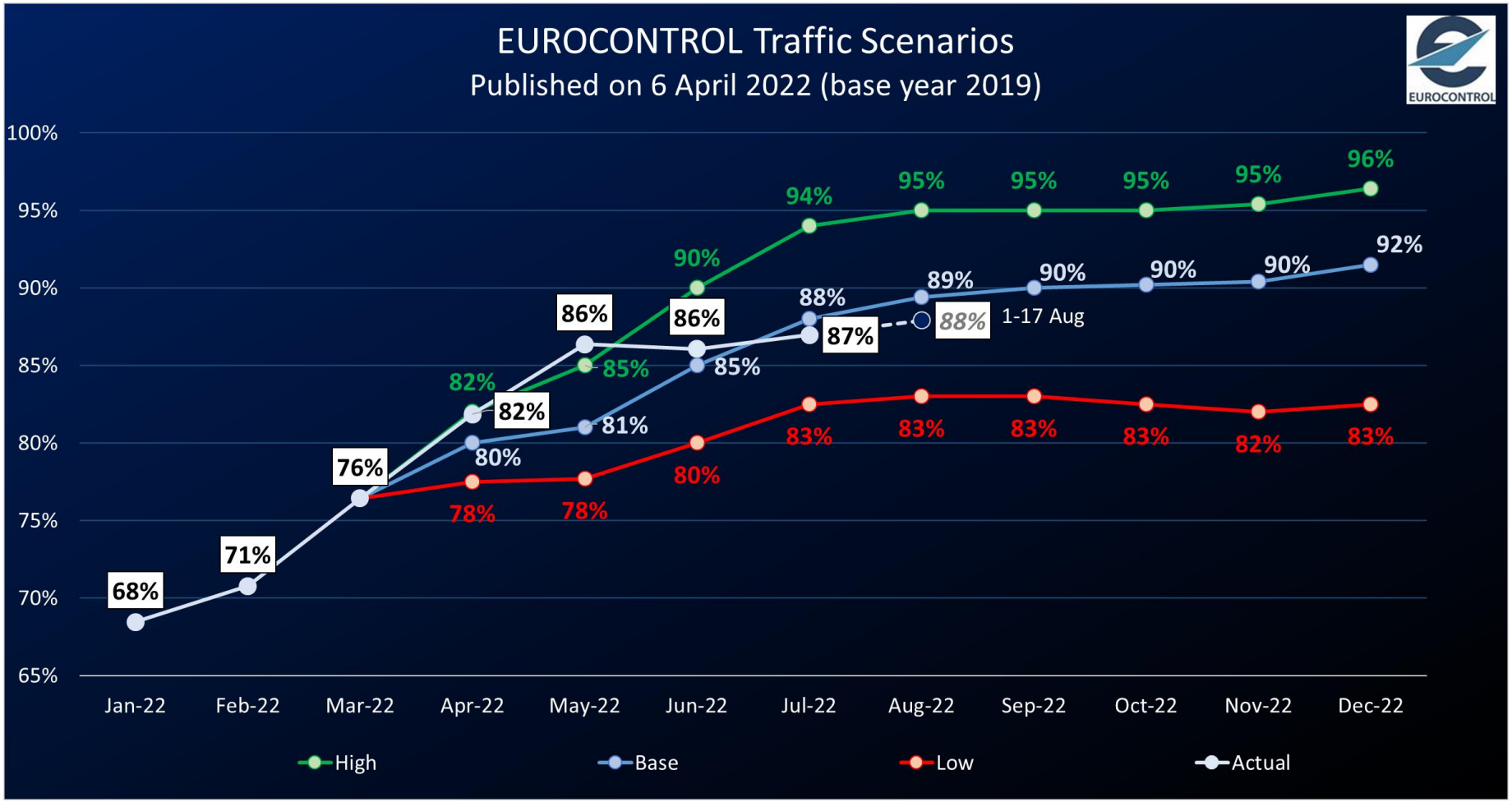
On week 11 Aug – 17 Aug:

- **30,242** average daily flights.
- **stable** on previous week.
- **87%** of 2019 traffic levels.
- Stabilisation since early July 2022.

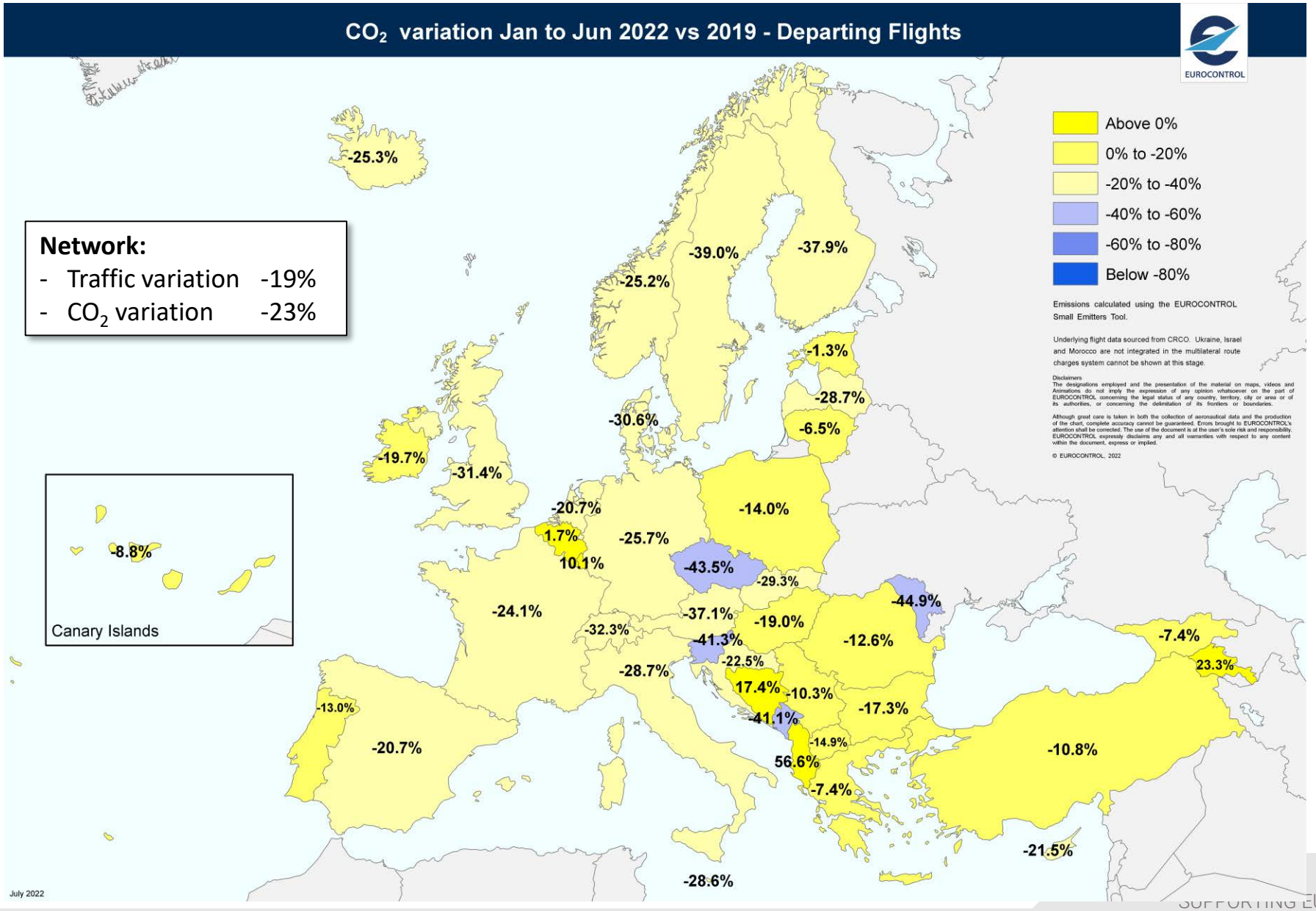


Current situation compared to the latest EUROCONTROL traffic scenarios

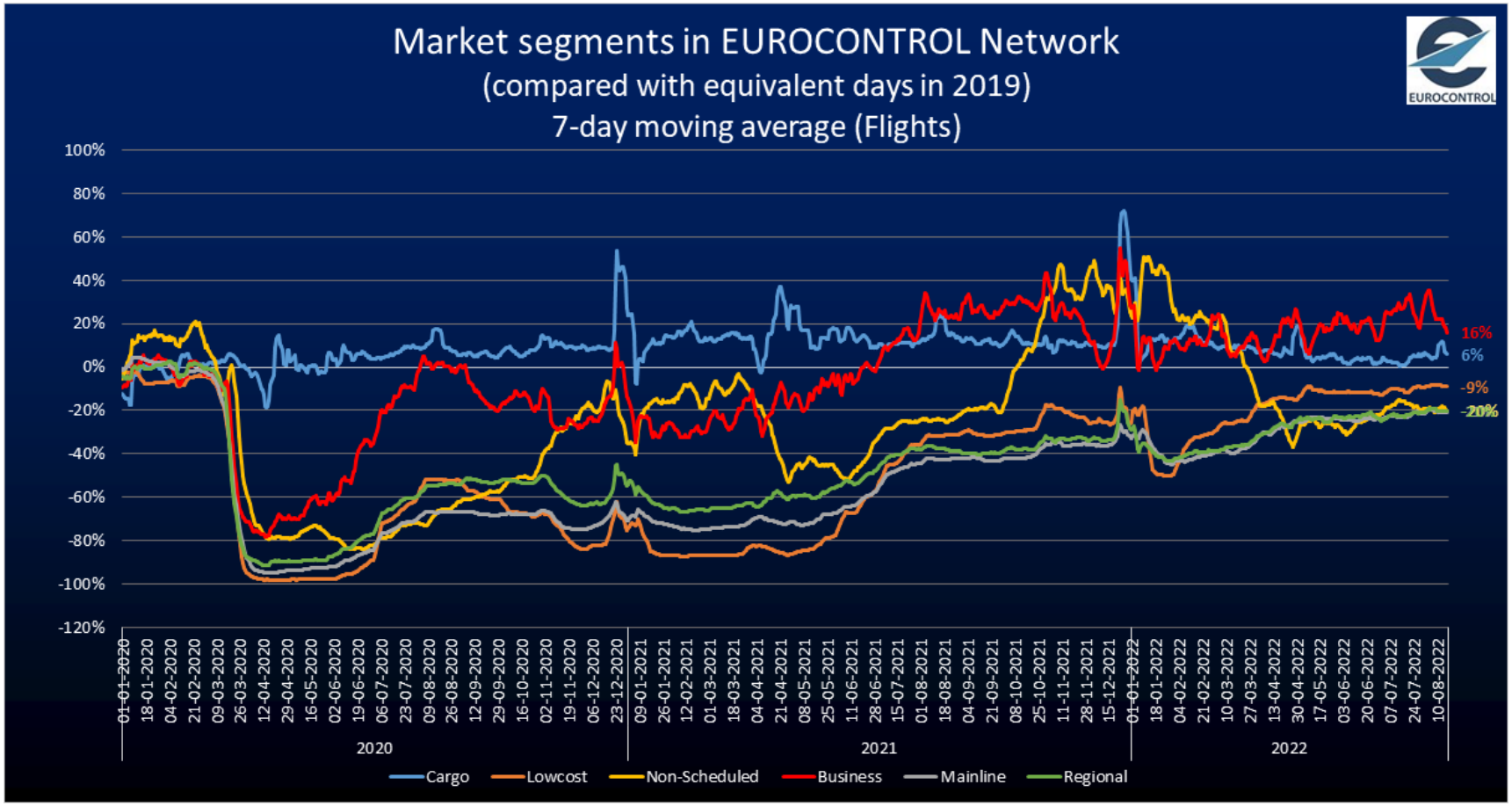
- The last EUROCONTROL Traffic scenarios have been published on 6 April 2022.
- For the **first 16 days of August**, network traffic is at **88% of 2019** levels, slightly below the base scenario.
- On a year to date basis, network traffic in 2022 stands at **81**% of 2019.



Aviation Sustainability



Market Segments



Up until 17 August 2022, compared to 2019:

- Two segments are above 2019 levels: **Business Aviation** (+16%) and **All-cargo** (+6%).
- **Low-Cost** (-9%) recorded a continuous increase at the beginning of 2022 but are now stable.
- **Charter** (-20%) decreased mainly since the start of the Russian invasion of Ukraine but started to slightly improve with holidays start.
- **Mainline** (-21%) and **Regional** (-20%) have been recovering since the beginning of 2022 but are now stable since July (vs 2019).

Note: a new Segment "Regional" has been created by selecting commercial flights operated by aircraft types between 19 and 120 seats.

Aircraft operators (Average daily flights for the last week)

Top 10

Top 10 Aircraft Operators	Week (11 - 17 Aug 2022)		
	Average flights per day	% vs 2019	% over previous week
RYANAIR	3 015	+15%	+0%
easyJet	1 631	-14%	-1%
TURKISH AIRLINES	1 491	-1%	-0%
Lufthansa	1 203	-20%	+0%
AIRFRANCE	1 067	-10%	+0%
Wizz	818	+20%	+0%
KLM Royal Dutch Airlines	770	-18%	-1%
vueling	708	-4%	-1%
BRITISH AIRWAYS	699	-29%	+0%
Scandinavian Airlines	578	-31%	+2%

- **Ryanair** is the busiest Aircraft Operator with 3,015 flights per day on average over last week, followed by **easyJet** (1,631), **Turkish Airlines** (1,491), **Lufthansa** (1,203), **Air France** (1,067), **Wizz Air** (818) and **KLM** (770).
- The ranking remains unchanged compared to a month ago.

Within the top 10, **nine airlines** posted **decreases or stabilization** over the previous week, highest being:

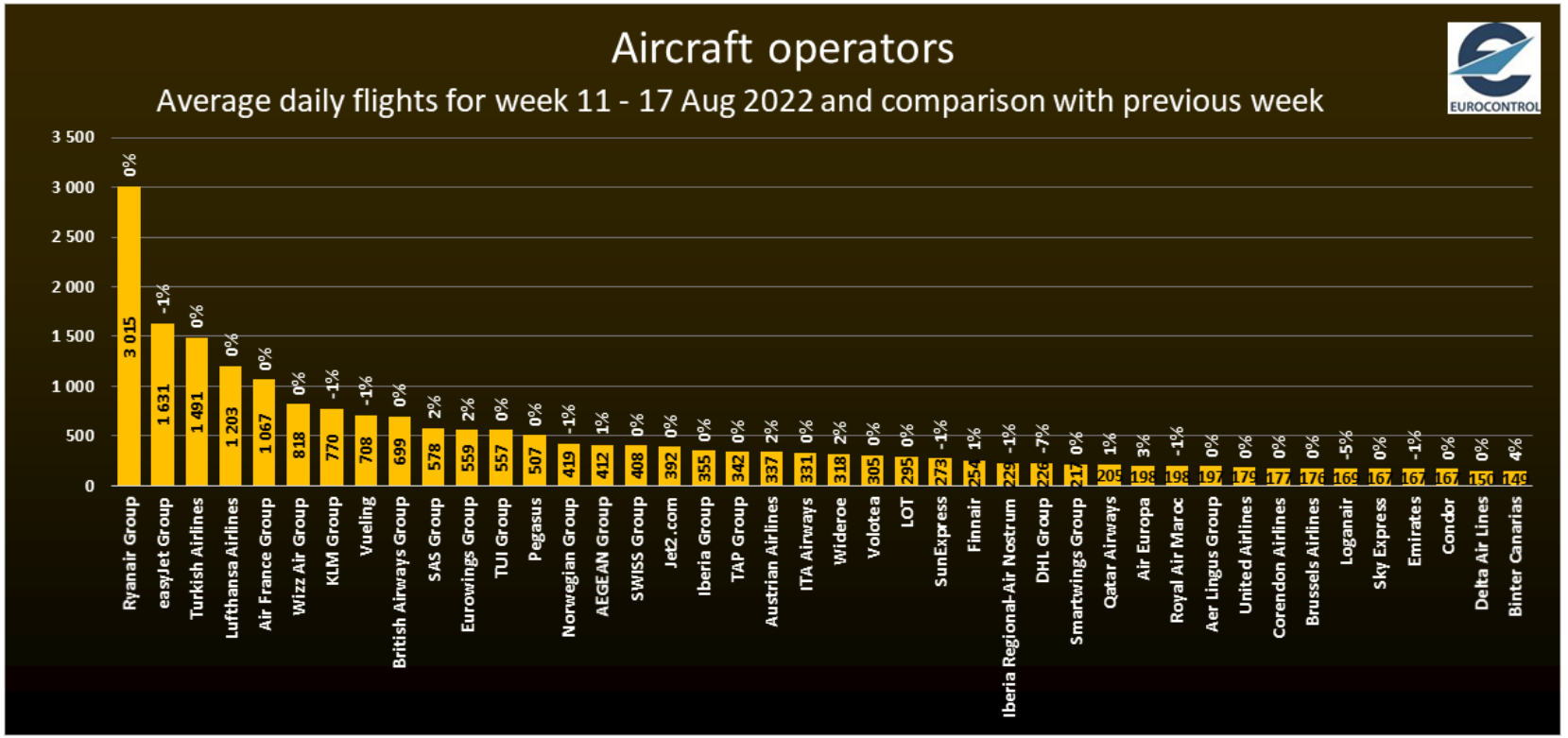
- **Turkish Airlines** (-8 flights; -1%) mainly due to flows with Germany, Denmark, Saudi Arabia and France.
- **Lufthansa** (-5 flights; 0%) mainly due to flows Germany-Italy and Germany-Spain.
- **KLM Group** (-4 flights; -1%) mainly due to domestic flows and flows with Italy, UK and Norway.

Slight increases for:

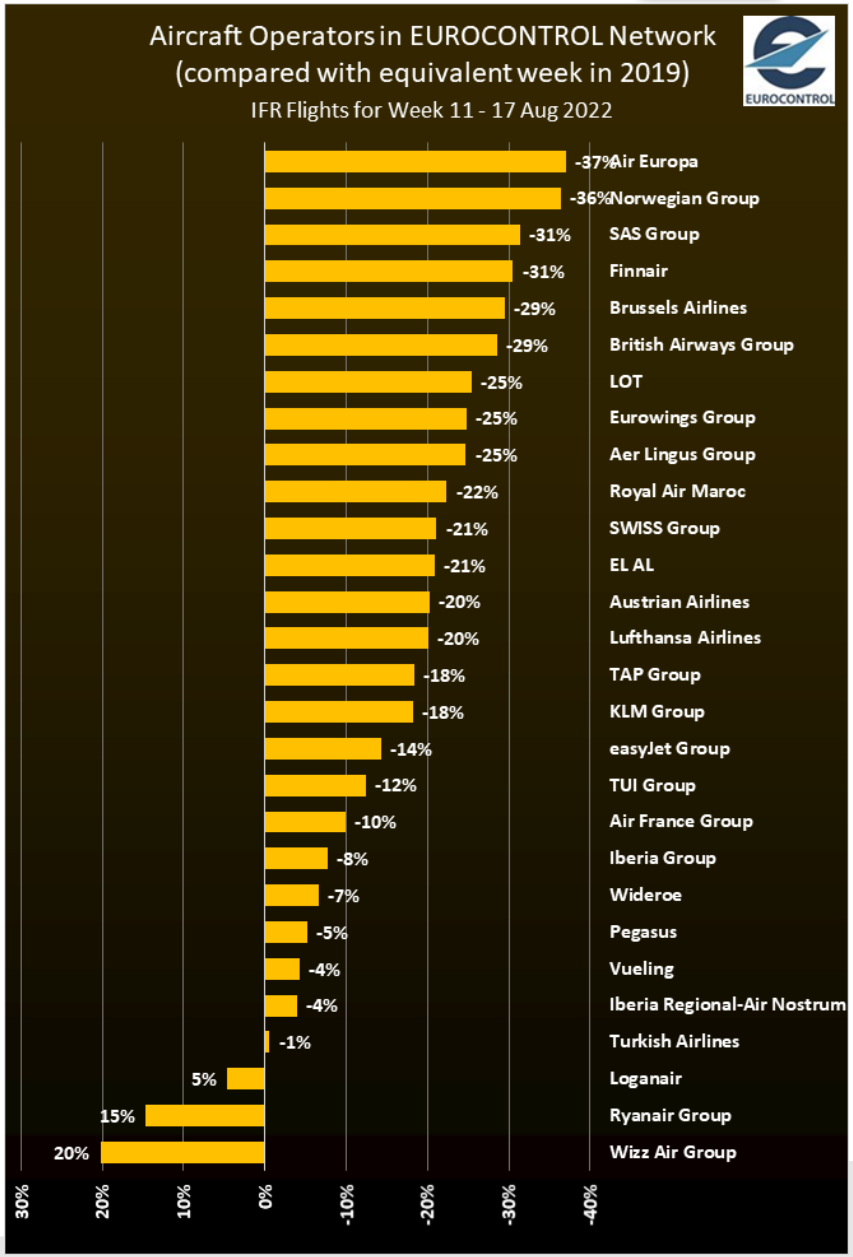
- **SAS Group** (+15 flights; +3%) mainly due to domestic flows in Norway and Sweden.
- **Ryanair** (+4 flights; 0%) notably owing to domestic flows in Italy and Poland.
- **British Airways** (+4 flights; 1%) mainly due to domestic flows and flows with Spain, Ireland.

Aircraft operators (Average daily flights for the last week)

Top 40

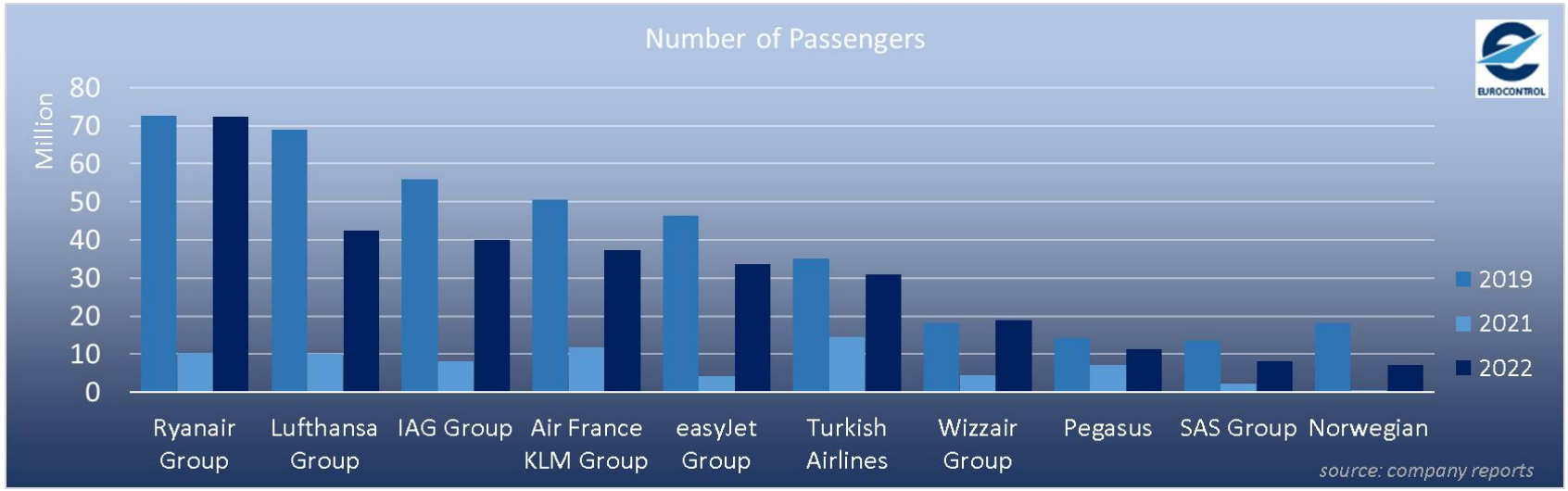


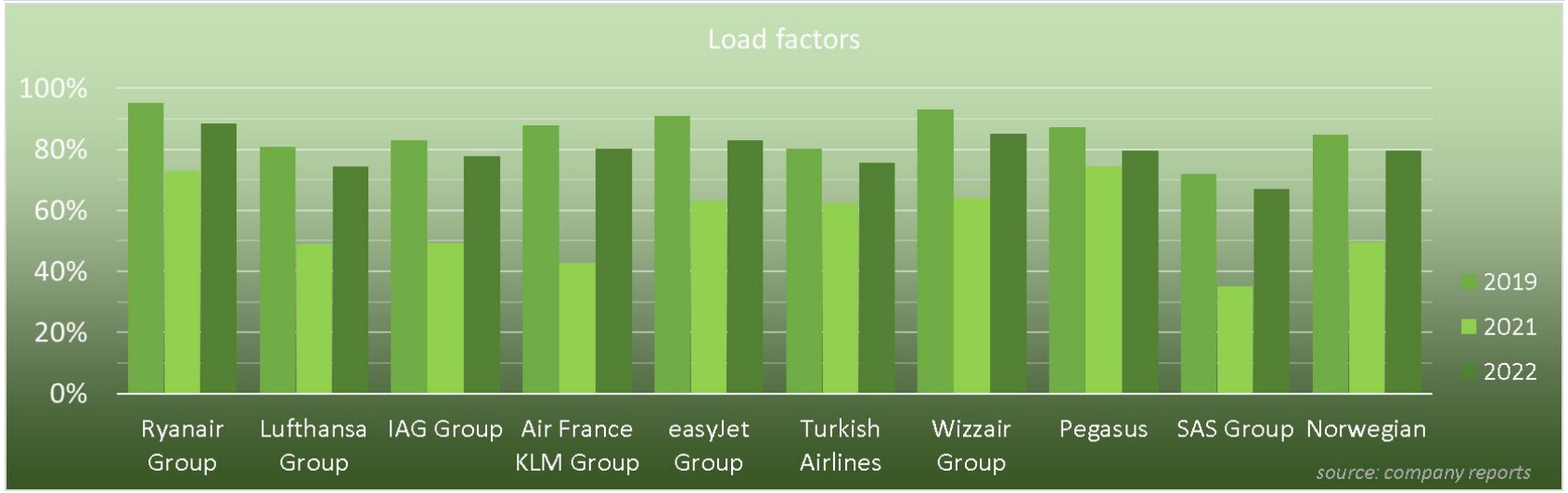
- Largest decreases in flights vs previous week for **DHL** (-7%), **easyJet** (-1%), **Loganair** (-5%), **Vueling** (-1%), **KLM** (-1%) and **Norwegian** (-1%).
- Highest increases for **Eurowings** (2%), **SAS** (2%) and **Austrian** (2%).
- Traffic levels ranging from -37% (**Air Europa**) to +20% (**Wizz air**) vs 2019.



Aircraft operators: traffic results for the first half (January to June)

Top 10





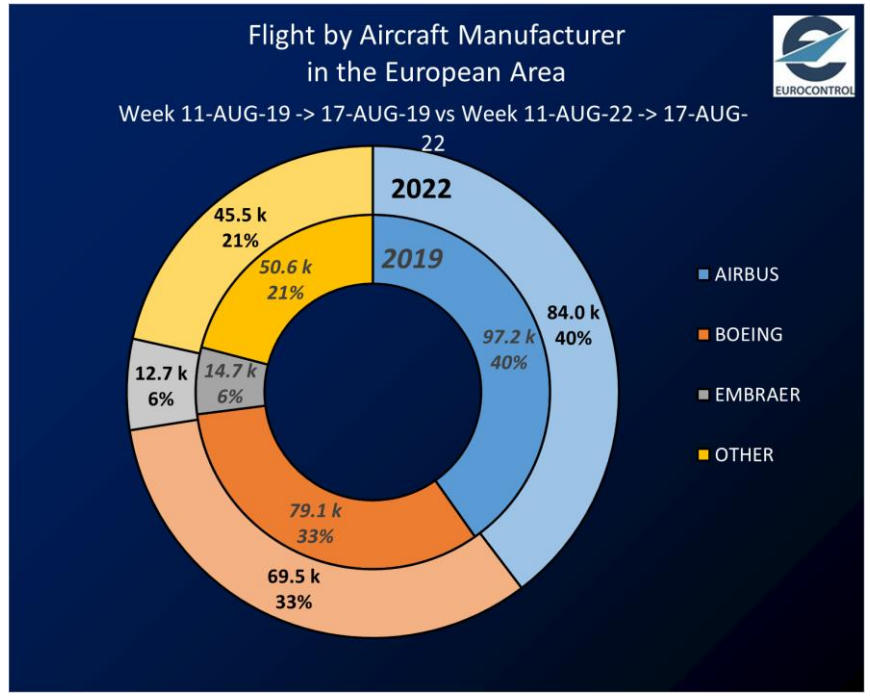
During the first half of 2022, and compared to 2019:

- **Wizzair** is the only operator recording **more passengers** than in **2019** (+4%)**. Ryanair** has nearly **recovered** (-0.2%).

- On **load factors**, aircraft operators have not yet recovered—on average—the pre-COVID levels; but first quarter 2022 was still affected (Omicron).

Aircraft Manufacturers (share of flights for the last week)

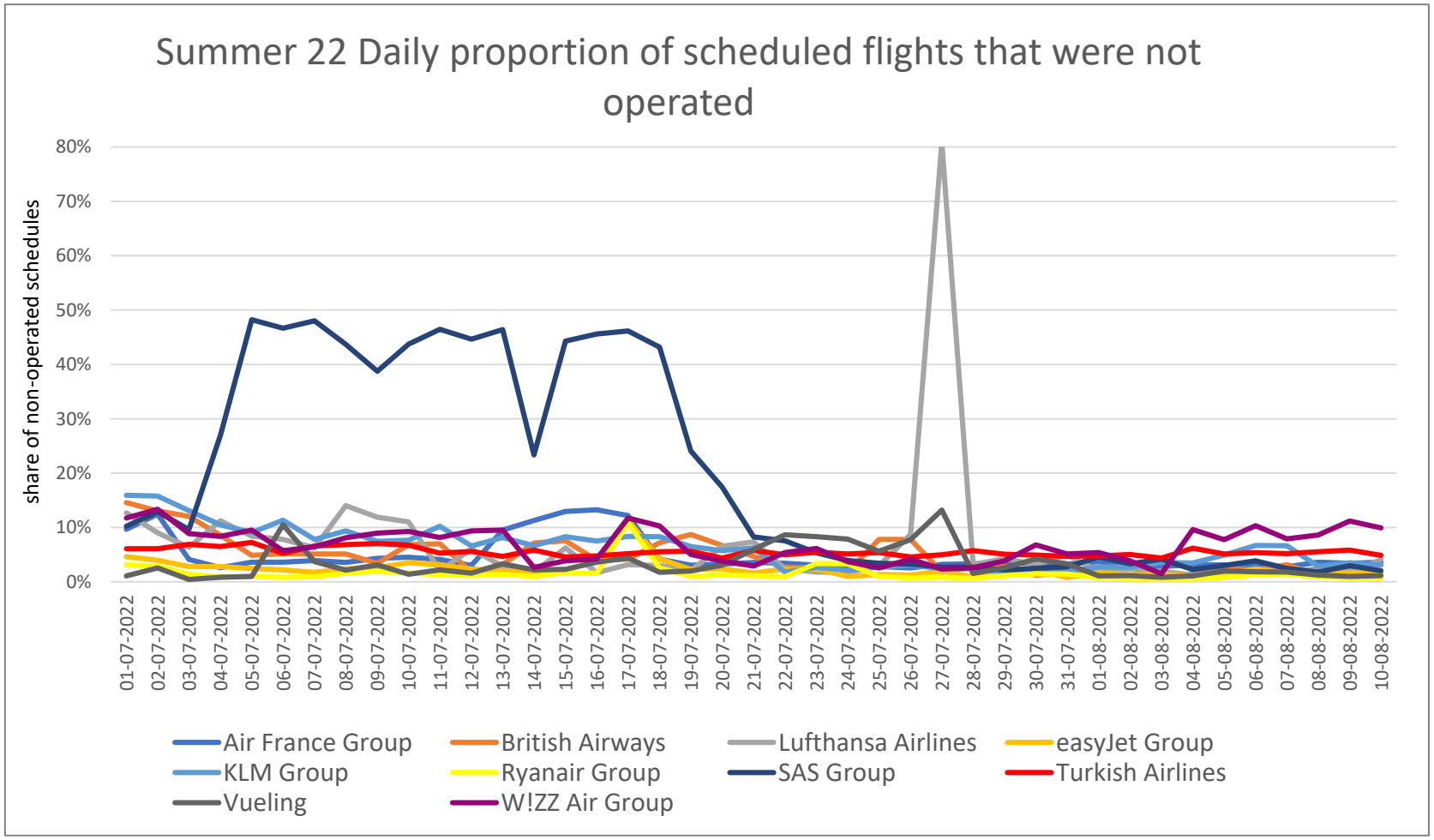
Flights of the top 20 Aircraft operators for the last week



- At European level, **40%** of all flights last week were operated by **Airbus** aircraft vs **33%** by **Boeing** aircraft.
- The situation varies for the top 20 aircraft operators. For these aircraft operators, Airbus share was 53%.

Aircraft operators: Non-Operated Schedules (daily share from 1st July 2022)

Top 10



Within the top 10, **two airlines** saw **significant operational impact** from July due to **industrial actions**:

- **SAS:** strong impact during the 15-day strike of SAS Scandinavia pilots' unions ending on 19 July. Recovery to normal operations afterwards.
- **Lufthansa:** very significant impact due to a Lufthansa ground staff industrial action on 27 July (more than 80% of non-operated scheduled flights).

Non-Operated schedules: *% of airline schedules for which no ATC flight plan was matched compared to the total number of expected flights based on the schedules in place two days earlier.*

Aircraft operators (Average daily flights for the last week)

Cargo, Legacy, Low Cost and Regional Carriers

PERFORMANCE OF MAJOR CARGO CARRIERS

for the week 11 - 17 August 2022

DHL
OPERATED 226 flights/day
+39% compared to the equivalent week in 2019

ASL AIRLINES BELGIUM
OPERATED 58 flights/day
-12% compared to the equivalent week in 2019

FedEx
OPERATED 55 flights/day
+4% compared to the equivalent week in 2019

ups
OPERATED 51 flights/day
+21% compared to the equivalent week in 2019

PERFORMANCE OF MAJOR LONG-HAUL/LEGACY CARRIERS

for the week 11 - 17 August 2022

Lufthansa
OPERATED 1203 flights/day
-20% compared to the equivalent week in 2019

TURKISH AIRLINES
OPERATED 1491 flights/day
-1% compared to the equivalent week in 2019

AIRFRANCE
OPERATED 1067 flights/day
-10% compared to the equivalent week in 2019

BRITISH AIRWAYS
OPERATED 699 flights/day
-29% compared to the equivalent week in 2019

KLM
OPERATED 770 flights/day
-18% compared to the equivalent week in 2019

SAS
OPERATED 578 flights/day
-31% compared to the equivalent week in 2019

PERFORMANCE OF MAJOR LOW-COST CARRIERS

for the week 11 - 17 August 2022

RYANAIR
OPERATED 3015 flights/day
+15% compared to the equivalent week in 2019

easyJet
OPERATED 1631 flights/day
-14% compared to the equivalent week in 2019

WIZZ
OPERATED 818 flights/day
+20% compared to the equivalent week in 2019

vueling
OPERATED 708 flights/day
-4% compared to the equivalent week in 2019

PEGASUS
OPERATED 507 flights/day
-5% compared to the equivalent week in 2019

Eurowings
OPERATED 559 flights/day
-25% compared to the equivalent week in 2019

PERFORMANCE OF MAJOR REGIONAL CARRIERS*

for the week 11 - 17 August 2022

widerøe
OPERATED 318 flights/day
-7% compared to the equivalent week in 2019

AIR NOSTRUM LINEAS AEREAS
OPERATED 229 flights/day
-4% compared to the equivalent week in 2019

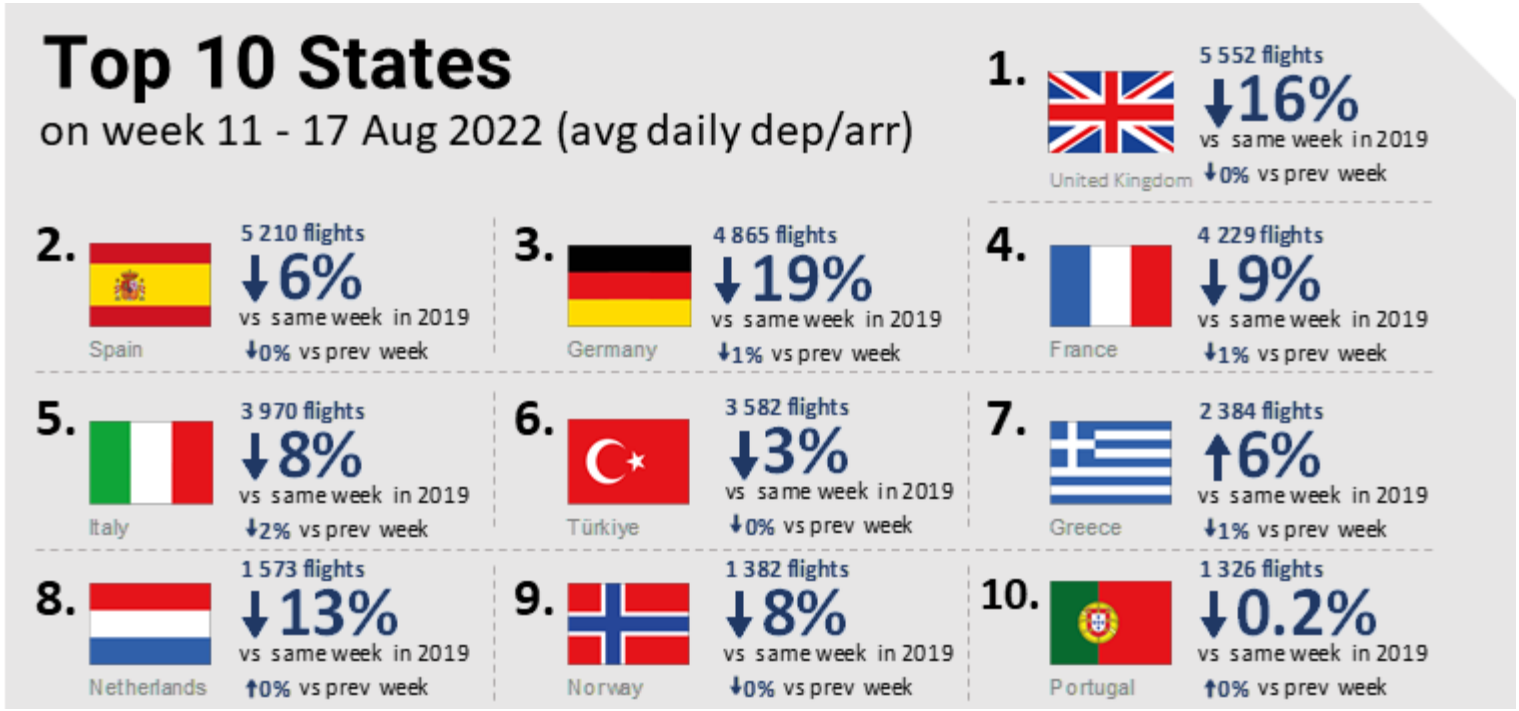
Loganair Scotland's Airline
OPERATED 169 flights/day
+5% compared to the equivalent week in 2019

Binter
OPERATED 149 flights/day
+27% compared to the equivalent week in 2019

OLYMPIC AIR
OPERATED 106 flights/day
-56% compared to the equivalent week in 2019

*REGIONAL AIRLINES USING SEPARATE IATA CODES

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 (5,552) followed by **Spain** (5,210), **Germany** (4,865), **France** (4,229), **Italy** (3,970) and **Türkiye** (3,582).
- Ranking remained unchanged compared to a month ago.

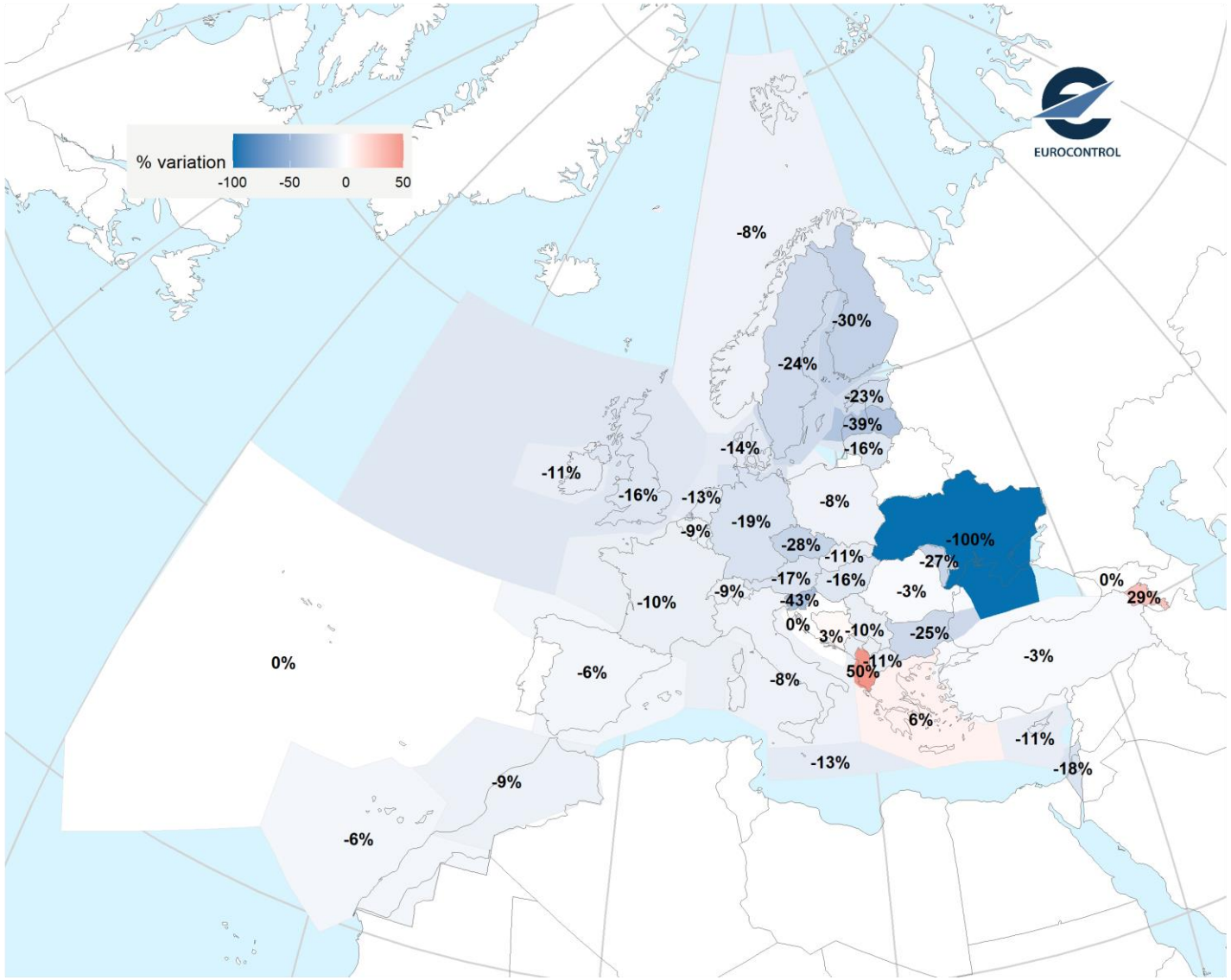
Within the top 10, **all but two** States posted flight decreases over the previous week:

- **Italy** (-118 flights; -3%) mainly due to light AOs, cargo operators (DHL, ASL) and SAS.
- **France** (-64 flights; -1%) mainly due to military flights, NetJets. Domestic flows as well as flows with Italy, Norway and Austria.
- **Spain** (-60 flights; -1%) mainly due to light AOs, SAS and Vueling. Domestic flows as well as flows with Norway, Italy and Sweden.
- **Greece** (-36 flights; -1%) mainly NetJets, light AOs and SAS. Flows with Denmark, Norway and domestic flows.

States (Average Daily Departure/Arrival flights for the last week)

State FIR daily % arrivals/departures variation vs 2019 on 2022-08-17

7-day average - FIRs at altitude FL200



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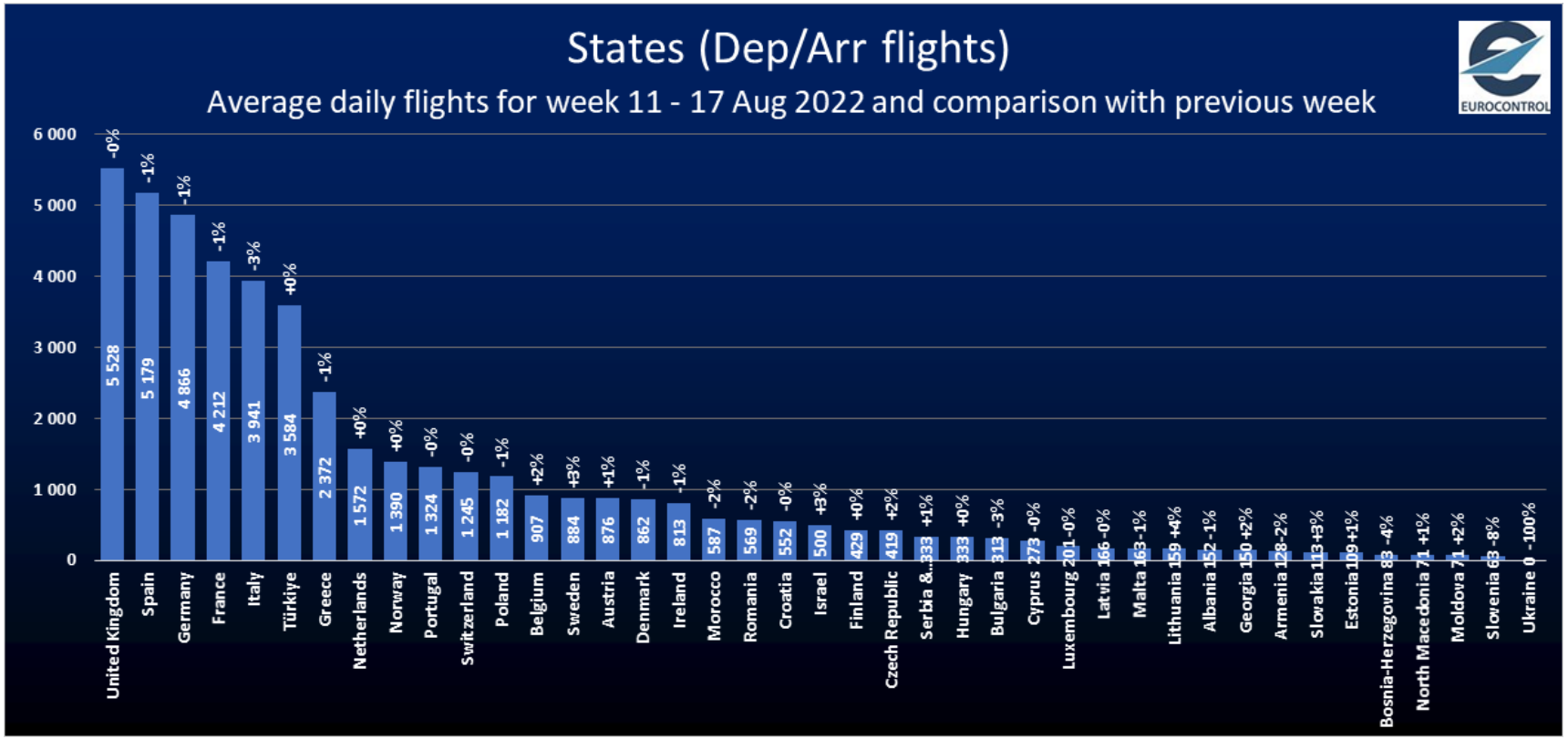
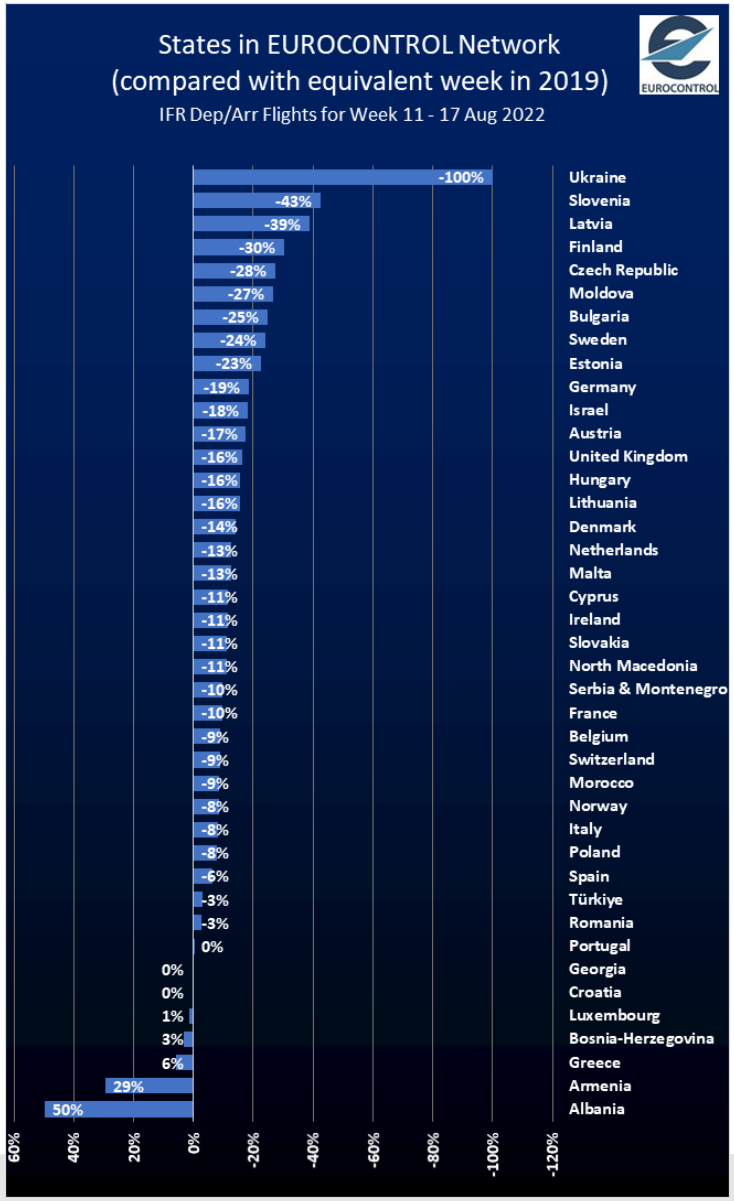
States (Average Daily Departure/Arrival flights for the last week)

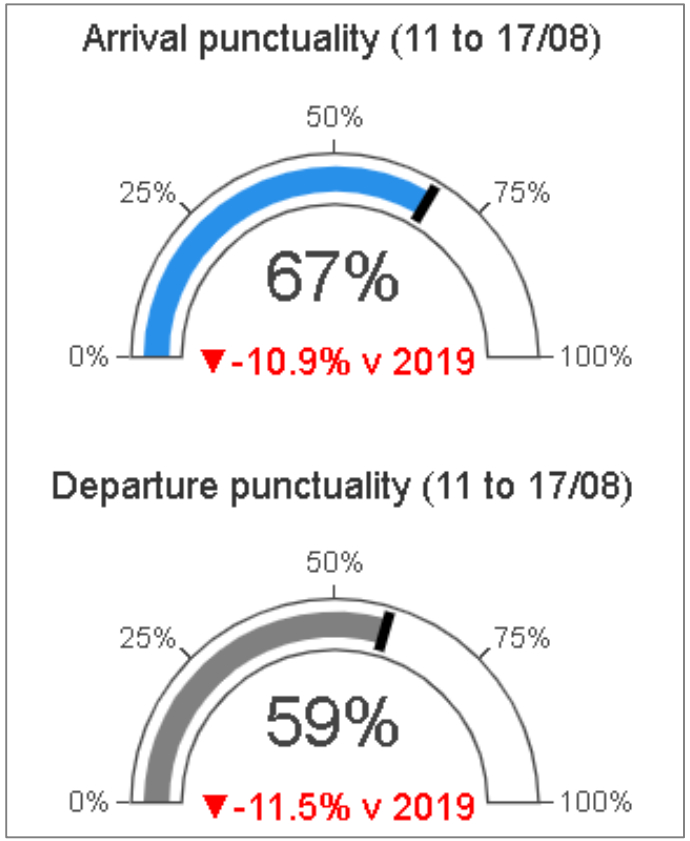
Top 40

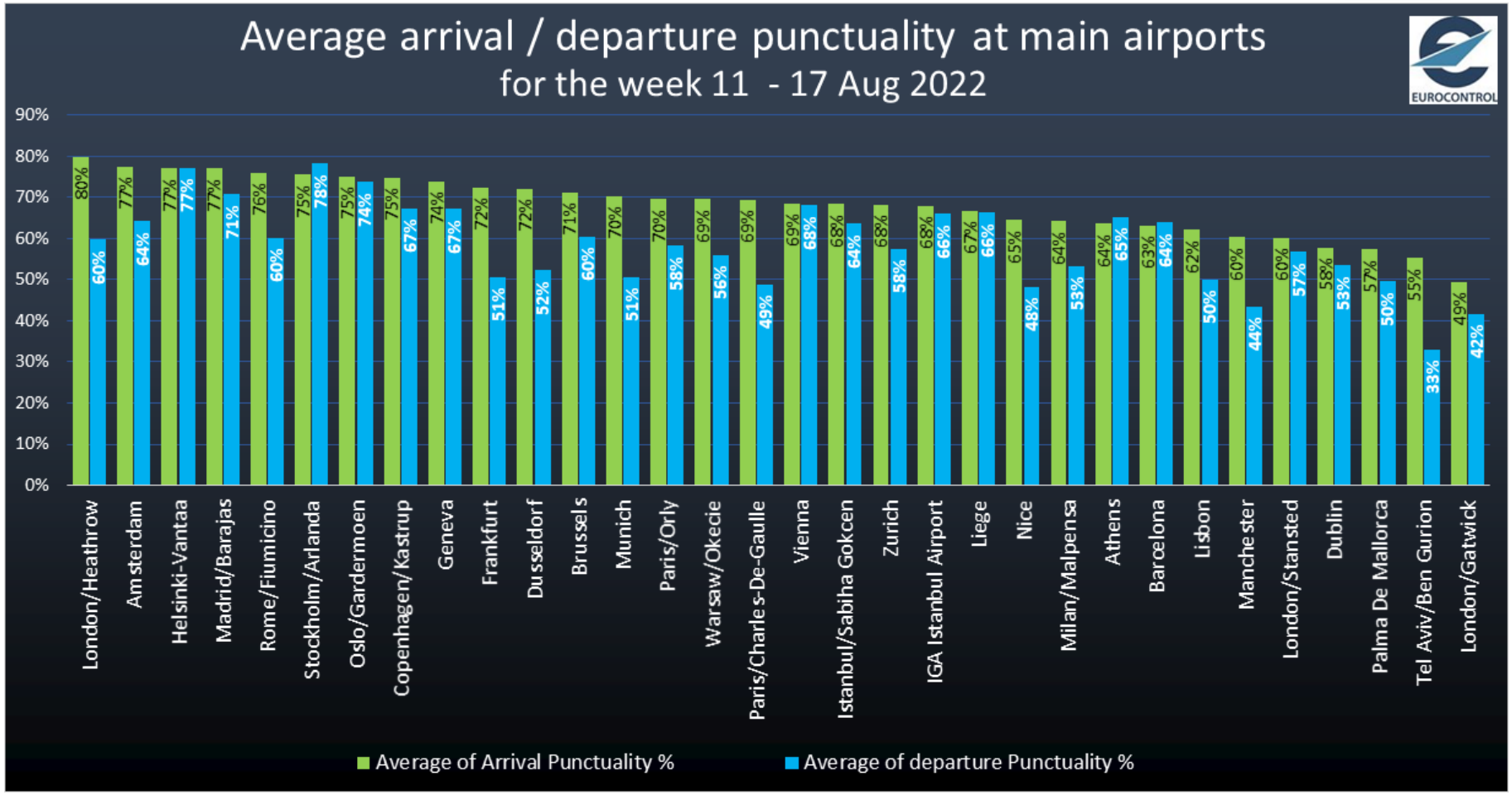




- Highest decreases in flights vs previous week for **Italy** (-3%), **France** (-1%); **Spain** (-1%), **Greece** (-1%), **Germany** (-1%), **UK** (0%), **Romania** (-2%) and **Denmark** (-1%).
- Highest increases for **Sweden** (+3%), **Belgium** (+2%) and **Israel** (+3%).
- Traffic levels ranging from -100% (**Ukraine**) to +50% (**Albania**), compared to 2019.

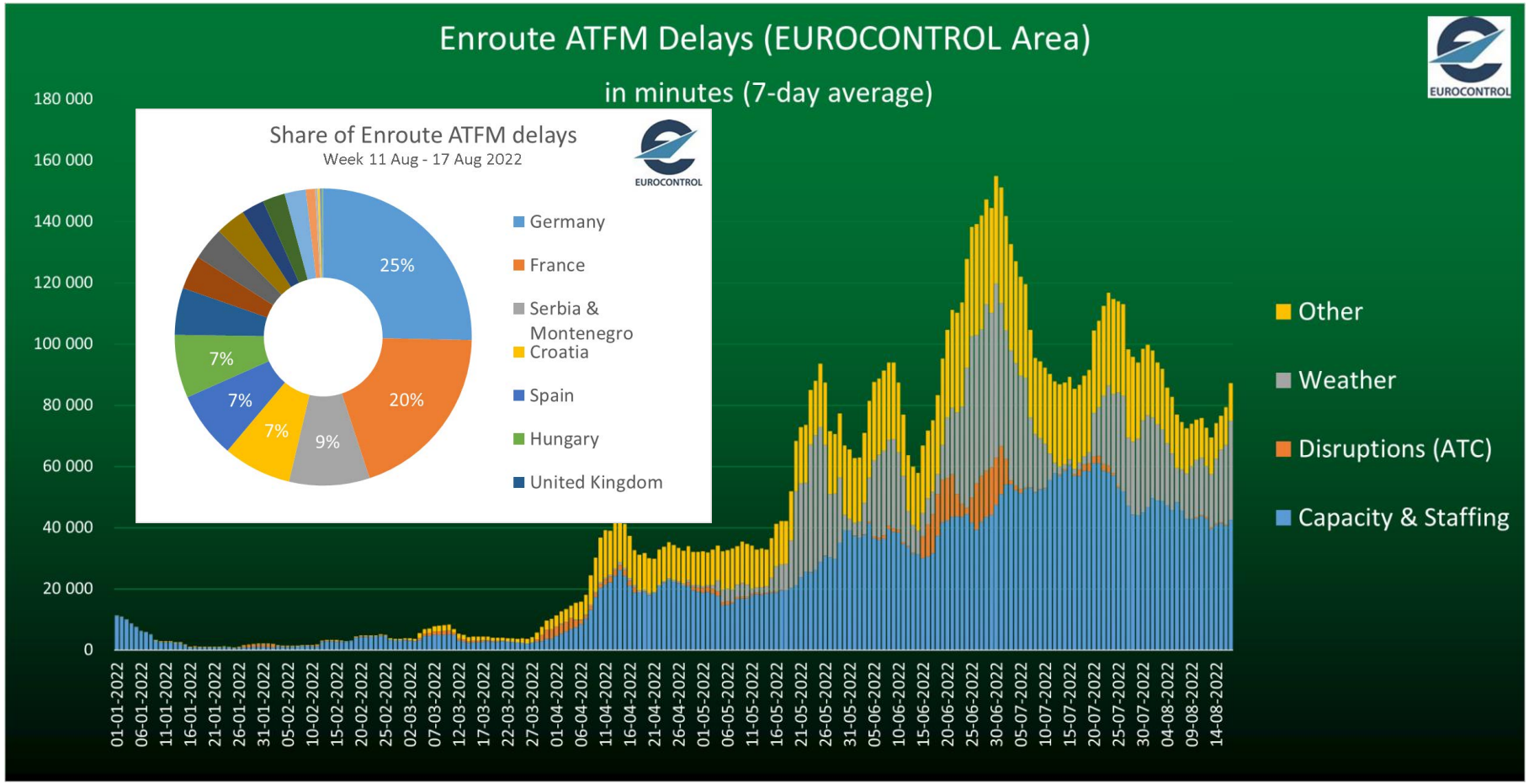
Arrival and Departure punctuality (At top airports for last week)





More detailed information on punctuality can be found on our new daily punctuality dashboards: main link, States link and Airports link.

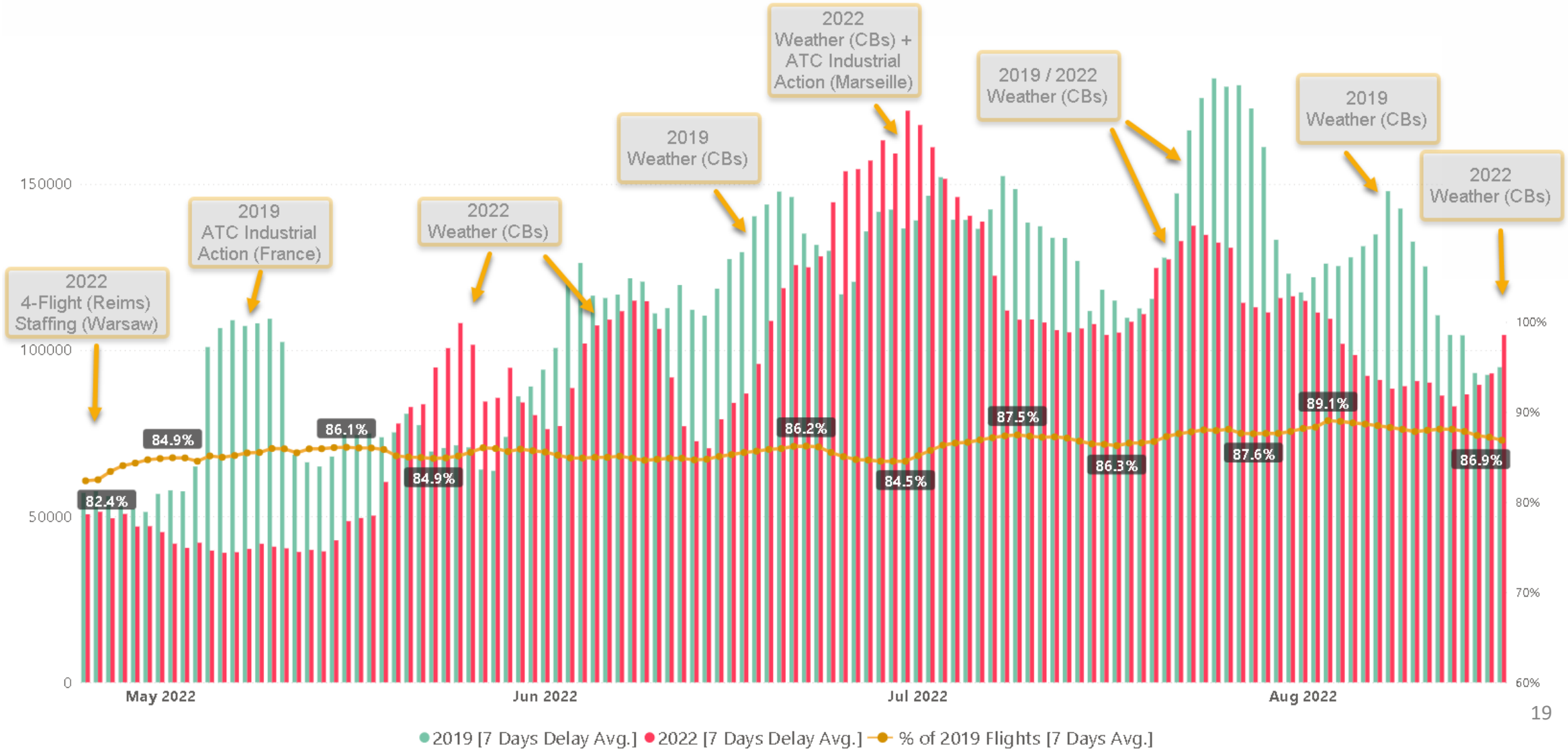
En-route ATFM delays



- En-route ATFM delays have started to rise since mid May 2022, reaching 2019 levels at 3 occasions (see next slide). Recent days are close to 2019 levels, mainly due to increase of Weather disruptions.
- Major contributors over the last 7 days: **Germany** (25% of all en-route ATFM delays), **France** (20%), **Serbia & Montenegro** (9%), **Croatia** (7%), **Spain** (7%), **Hungary** (7%) and **UK** (7%).

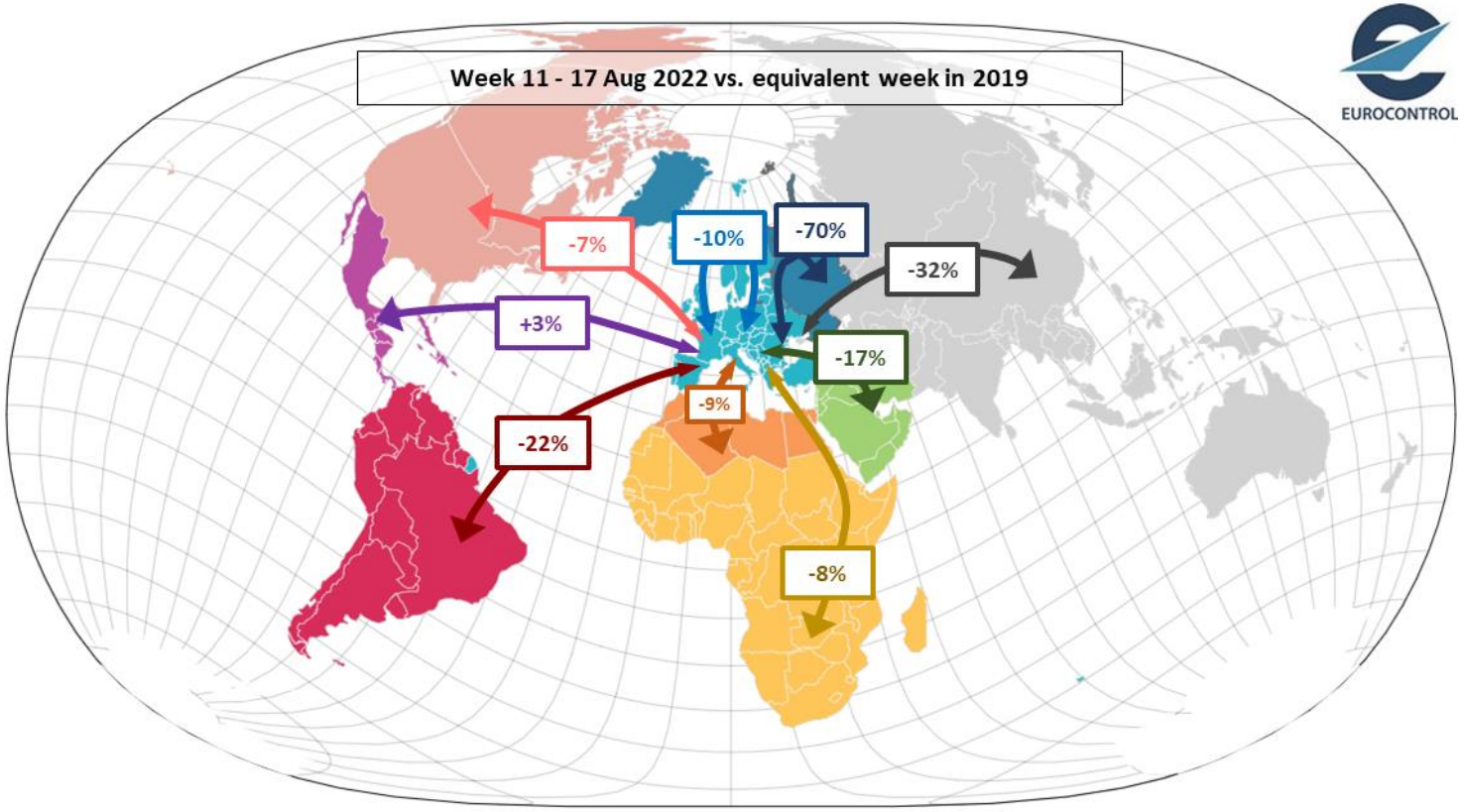
Total ATFM delays (All causes, airports and en-route)

2019 and 2022 (7-day average)



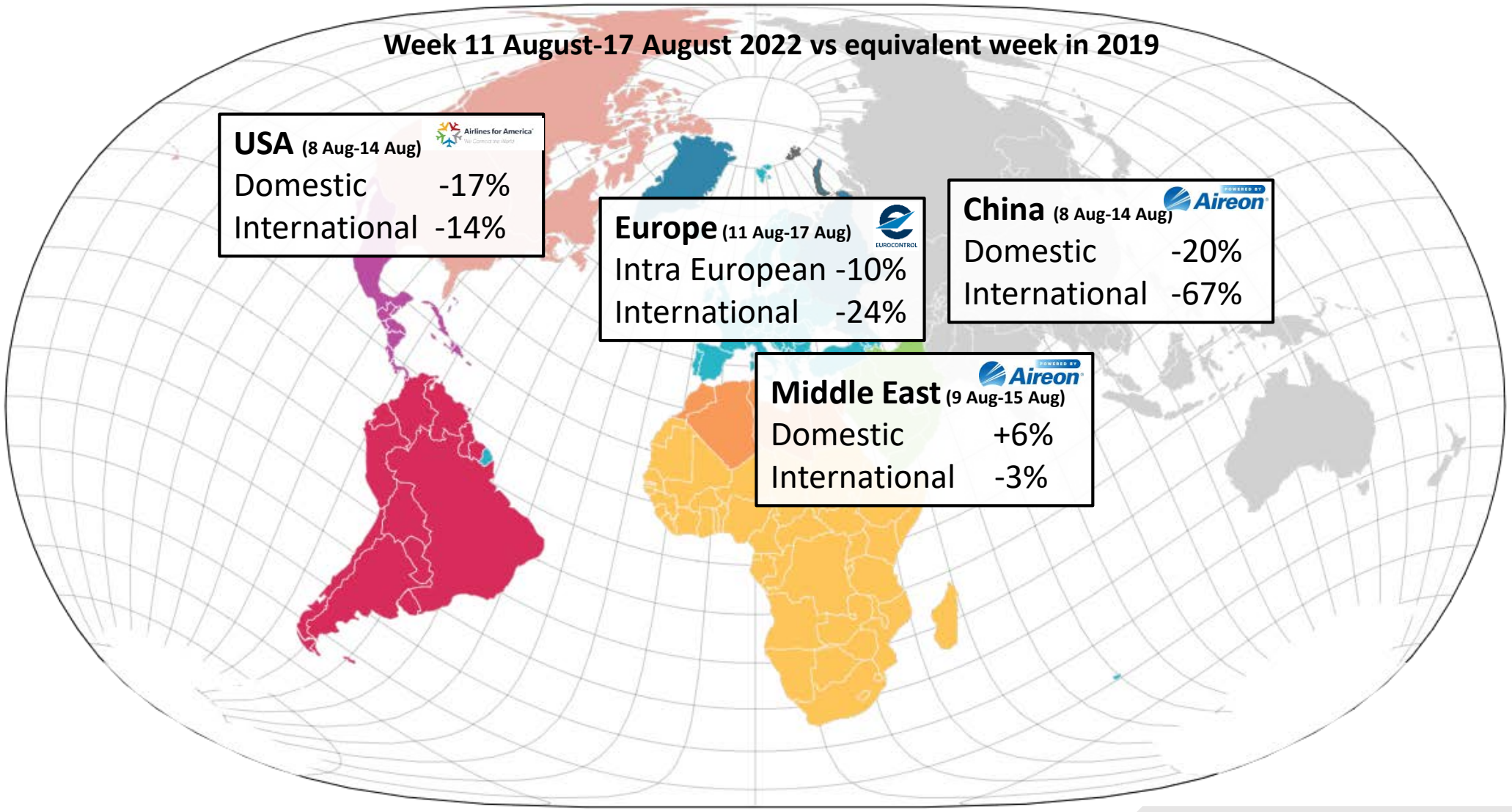
Traffic flows (Average Daily Departure/Arrival flights for the last week)

- The main traffic flow is the intra-Europe flow with 24,023 flights on average for the most recent week, decreasing by 1% over the previous week.
- Flows between Europe and Other Europe (incl. Russia) are at -70% compared to 2019.
- Important lockdown in China in March-June, affecting Chinese domestic flows, but now back to early 2022 levels (next slide).
- Intra-Europe flights are at -10% compared to 2019 while intercontinental flows are at -24%.



REGION (Average daily flights)	Week 04/08/2022 - 10/08/2022	Week 11/08/2022 - 17/08/2022	%	vs. 2019
Intra-Europe	**24 171**	**24 023**	***-1%***	***-10%***
Europe<->Asia/Pacific	567	562	*-1%*	*-32%*
Europe<->Mid-Atlantic	179	179	*-0%*	*+3%*
Europe<->Middle-East	1 479	1 485	*+0%*	*-17%*
Europe<->North Atlantic	1 326	1 329	*+0%*	*-7%*
Europe<->North-Africa	1 131	1 126	*-0%*	*-9%*
Europe<->Other Europe	398	403	*+1%*	*-70%*
Europe<->South-Atlantic	155	153	*-2%*	*-22%*
Europe<->Southern Africa	291	283	*-3%*	*-8%*
Non Intra-Europe	**5 526**	**5 519**	***-0%***	***-24%***

Outside Europe (traffic situation over the last week vs 2019)



Long haul Airport-Pairs (Average Daily flights for the last week)

Top 20

Rank evolution over prev. week	Top 20 Long Haul Airport-Pairs on week 11 - 17 Aug 2022					
	Airport-Pair	Avg daily flights	Δ vs prev. week		% vs prev. week	% vs 2019
→	London/Heathrow <-> New York JFK	32	→	+0	+0%	-20%
↗	London/Heathrow <-> Los Angeles	18	→	+0	+2%	+0%
→	Paris/Charles-De-Gaulle <-> New York JFK	18	→	+0	+0%	+28%
→	London/Heathrow <-> Dubai	16	→	+0	+0%	-8%
→	London/Heathrow <-> Chicago O Hare Intl	15	→	-0	-2%	-15%
→	London/Heathrow <-> Newark	15	→	-0	-1%	-5%
→	London/Heathrow <-> Hamad INTL	14	→	+0	+0%	-2%
↗	Paris/Charles-De-Gaulle <-> Montreal/Dorval	14	→	+0	+1%	+1%
→	London/Heathrow <-> San Francisco	13	→	-0	-1%	+12%
↗	Paris/Orly <-> Pointe-A-Pitre/Le Ra	13	→	+0	+2%	+4%
↗	London/Heathrow <-> Delhi	12	→	+0	+4%	+23%
↘	Madrid/Barajas <-> Bogota Intl/Eldorado	12	→	+0	+0%	+14%
↘	Frankfurt <-> Seoul/Inchon INTL	12	→	-0	-3%	+53%
→	London/Heathrow <-> Singapore/Changi	12	→	+0	+0%	-16%
→	London/Heathrow <-> Boston	12	→	+0	+0%	-15%
→	Paris/Charles-De-Gaulle <-> Dubai	12	→	+1	+5%	+17%
↗	Paris/Orly <-> Fort de France	11	→	+0	+1%	+4%
↗	Frankfurt <-> New York JFK	11	→	+1	+7%	+17%
↘	Rome/Fiumicino <-> New York JFK	11	→	-0	-1%	-10%
↘	Milan/Malpensa <-> New York JFK	10	→	-0	-1%	+3%

Within the top 20, most **long-haul airport pairs** remained stable on previous week**.**

Slight **changes** over the last week with:

Increases for:

- **Paris/CDG – Dubai** (+1 flight)
- **Frankfurt– New York JFK** (+1 flight)

Country pairs (Average Daily flights for the last week)

Top 10

Rank evolution over prev. week	Top 10 Country-Pair on week 11 - 17 Aug 2022				
	Country-Pair	Avg daily flights	Δ vs prev. week	% vs prev. week	% vs 2019
→	Spain <-> Spain	1 288	-16	-1%	+1%
→	Italy <-> Italy	971	-23	-2%	+5%
→	Spain <-> United Kingdom	919	+2	+0%	-10%
↗	Türkiye <-> Türkiye	837	+9	+1%	-15%
↘	France <-> France	819	-16	-2%	-13%
→	United Kingdom <-> United Kingdo	808	-14	-2%	-25%
→	Norway <-> Norway	758	+51	+7%	-5%
→	Germany <-> Spain	574	-5	-1%	-10%
→	Germany <-> Germany	567	+7	+1%	-34%
→	Germany <-> Türkiye	500	-3	-1%	+13%

Seven of the **top 10** flows are domestic.

- **Spain-Spain** is the country-pair with the highest number of dep/arr flights (1,288) followed by **Italy-Italy** (971), **Spain-UK** (919), **Türkiye-Türkiye** (837), **France-France** (819), **UK-UK** (808), **Norway-Norway** (7580) and Germany-**Spain** (574).
- Türkiye-Türkiye increased their ranking while France-France decreased.

Within the top 10, **six** flows posted an **decrease** over the previous week for:

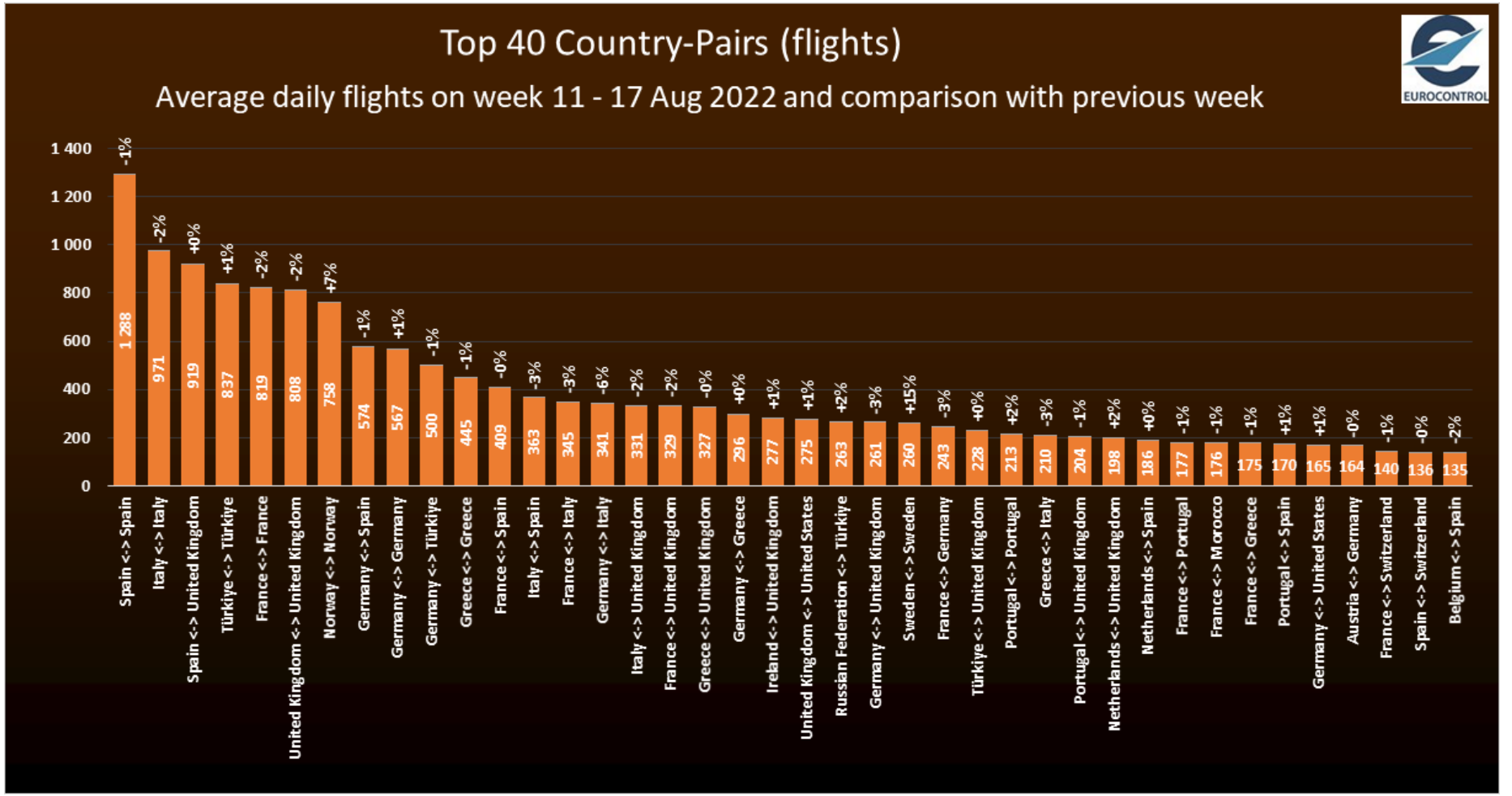
- **Italy-Italy** (-23 flights; -2%) mainly due to light AOs, military flights and cargo flights.
- **France-France** (-16 flights; -2%) mainly due to less military flights, Jetfly aviation and NetJets.
- **Spain-Spain** (-16 flights; -1%) mainly due to light AOs, One Air, Swiftair, Canarias Airlines and Vueling.

Increases for:

- **Norway-Norway** (+51 flights; +7%) mainly due to SAS, Norwegian and Flyr.
- **Türkiye-Türkiye** (+9 flights; +1%) mainly due to Turkish Airlines and light AOs.

Country pairs (Average Daily flights for the last week)

Top 40



- Highest decrease in flights vs previous week for **Italy-Italy** (-2%), **Germany-Italy** (-6%), **France-France** (-2%), **Spain-Spain** (-1%), **UK-UK** (-2%), **Italy-Spain (-3%)** and **France-Italy** (-3%).
- Highest increase in flights vs previous week for **Norway-Norway** (+7%), **Sweden-Sweden** (+15%), **Türkiye-Türkiye** (+1%), **Germany-Germany** (+1%) and **Portugal-Portugal** (+2%).

Airports (Average Daily Departure/Arrival flights for the last week)

Top 10

Rank evolution over prev. Week	Top 10 Airports on week 11 Aug - 17 Aug 2022				
	Airport	Average Daily Dep/Arr Flights	Δ over prev. week	% over prev. week	% vs 2019
→	IGA Istanbul Airport	1 339	+4	+0%	+2%
→	Paris/Charles-De-Gaulle	1 273	-7	-1%	-15%
→	Amsterdam	1 250	+4	+0%	-16%
→	Frankfurt	1 154	+7	+1%	-23%
→	London/Heathrow	1 091	-2	-0%	-20%
→	Madrid/Barajas	1 012	-4	-0%	-15%
→	Antalya	956	-3	-0%	-0%
→	Palma De Mallorca	940	-1	-0%	+2%
↗	Munich	899	+7	+1%	-22%
↘	Barcelona	880	-28	-3%	-17%

- **IGA Istanbul** is the airport with the highest number of dep/arr flights (1,339) followed by **Paris CDG** (1,273), **Amsterdam** (1,250), **Frankfurt** (1,154) and **London Heathrow** (1,091).
- **IGA Istanbul** is the busiest airport in Europe, recording more flights than in 2019 over the same week (+5%). **Palma de Mallorca** managed to exceed 2019 levels too (+2%).

Within the top 10, **six airports** posted **decreases or stabilization** over the previous week, highest being:

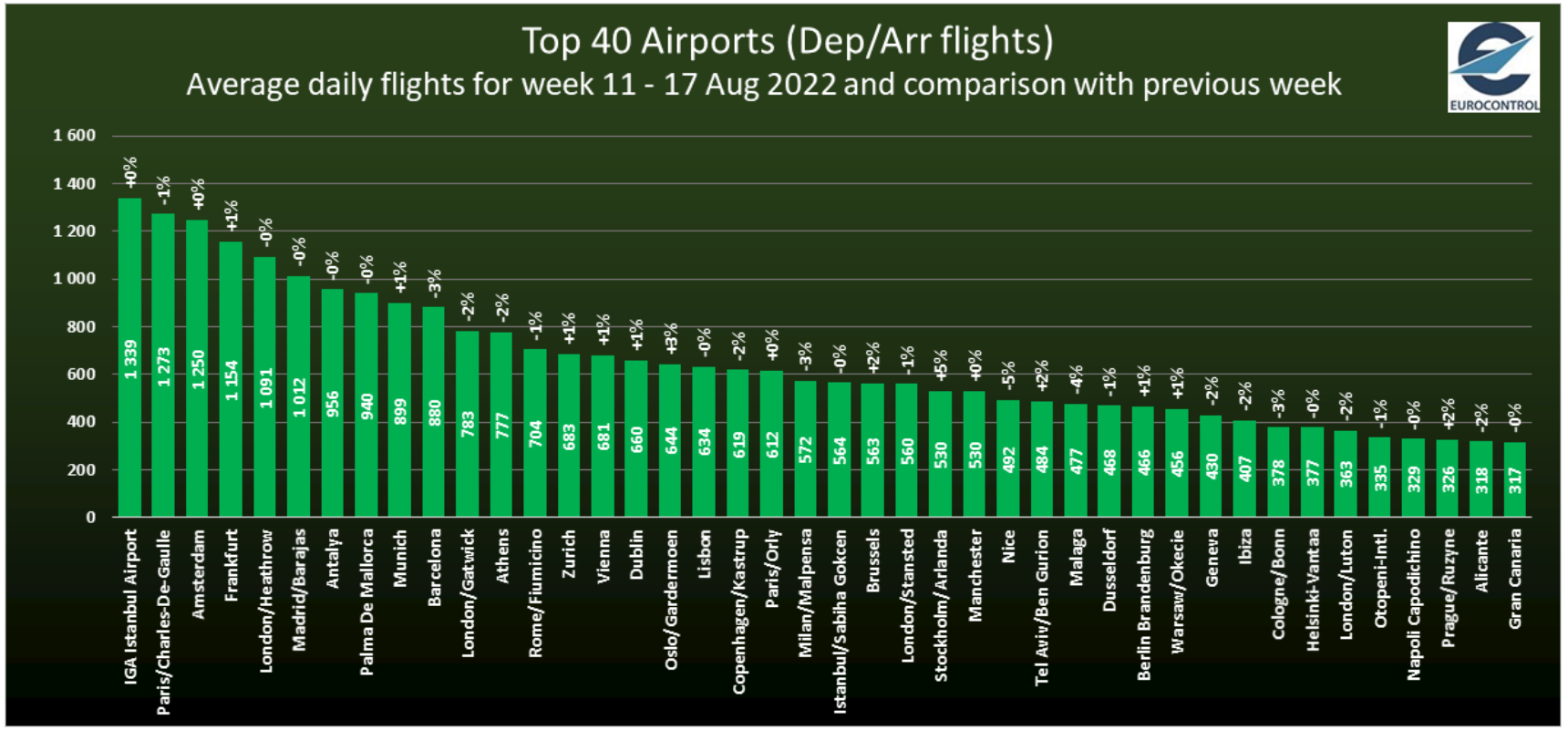
- **Barcelona** (-28 flights; -3%) mainly due to Vueling and easyJet. Domestic flows and flows with Italy and France.
- **Paris CDG** (-7 flights; -1%) mainly due to cargo operators (DHL, ASL) and easyJet. Flows with Italy, Germany and Spain.

Increases for:

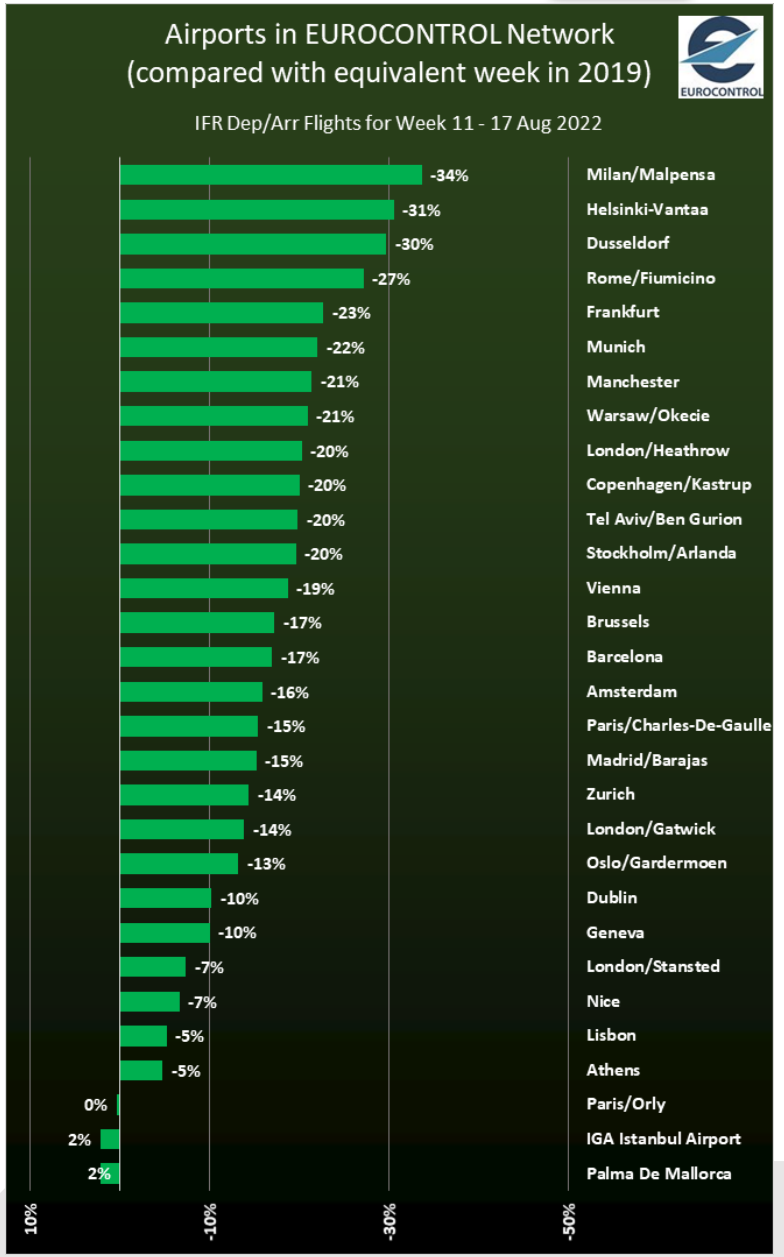
- **Frankfurt** (+7 flights; +1%) mainly due to Lufthansa and light AOs. Domestic flows and flows with the US.
- **Munich** (+7 flights; +1%) mainly due to Lufthansa. Domestic flows and flows with Türkiye.

Airports (Average Daily Departure/Arrival flights for the last week)

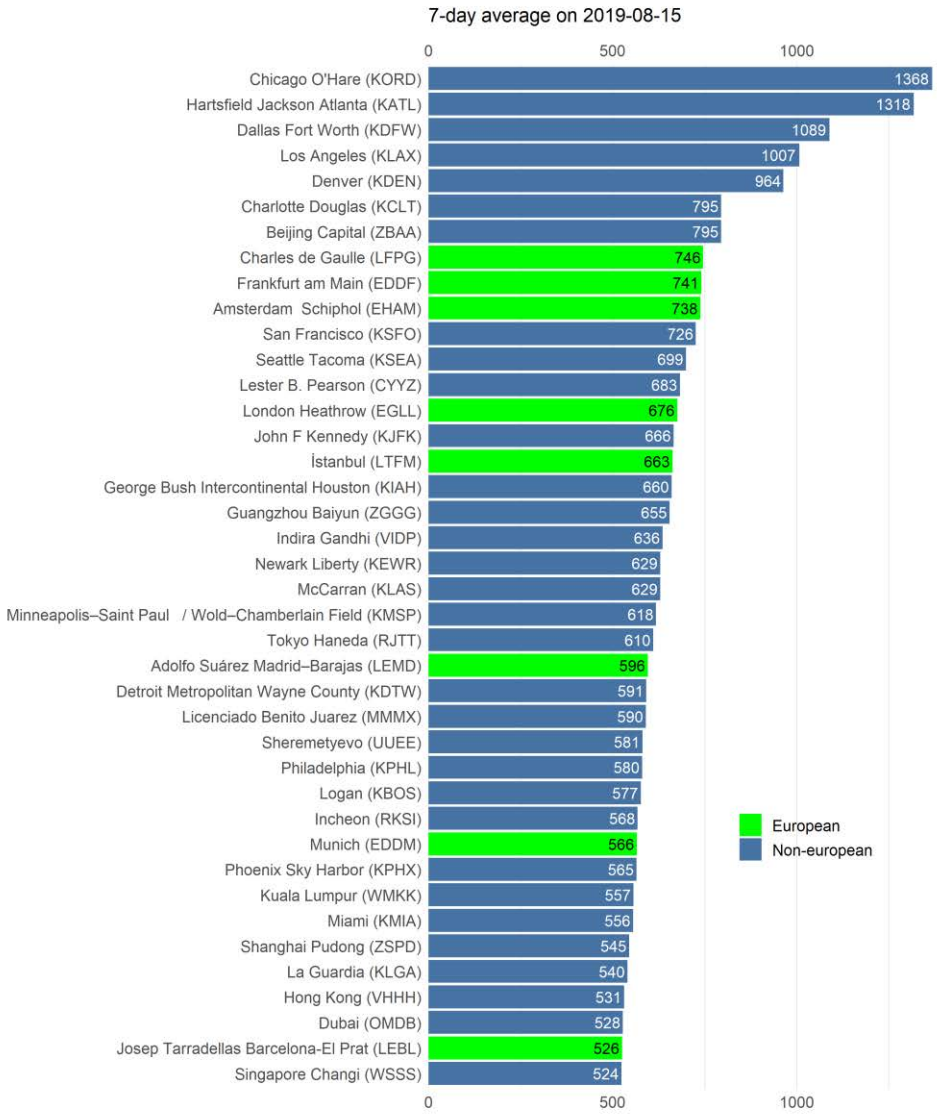
Top 40

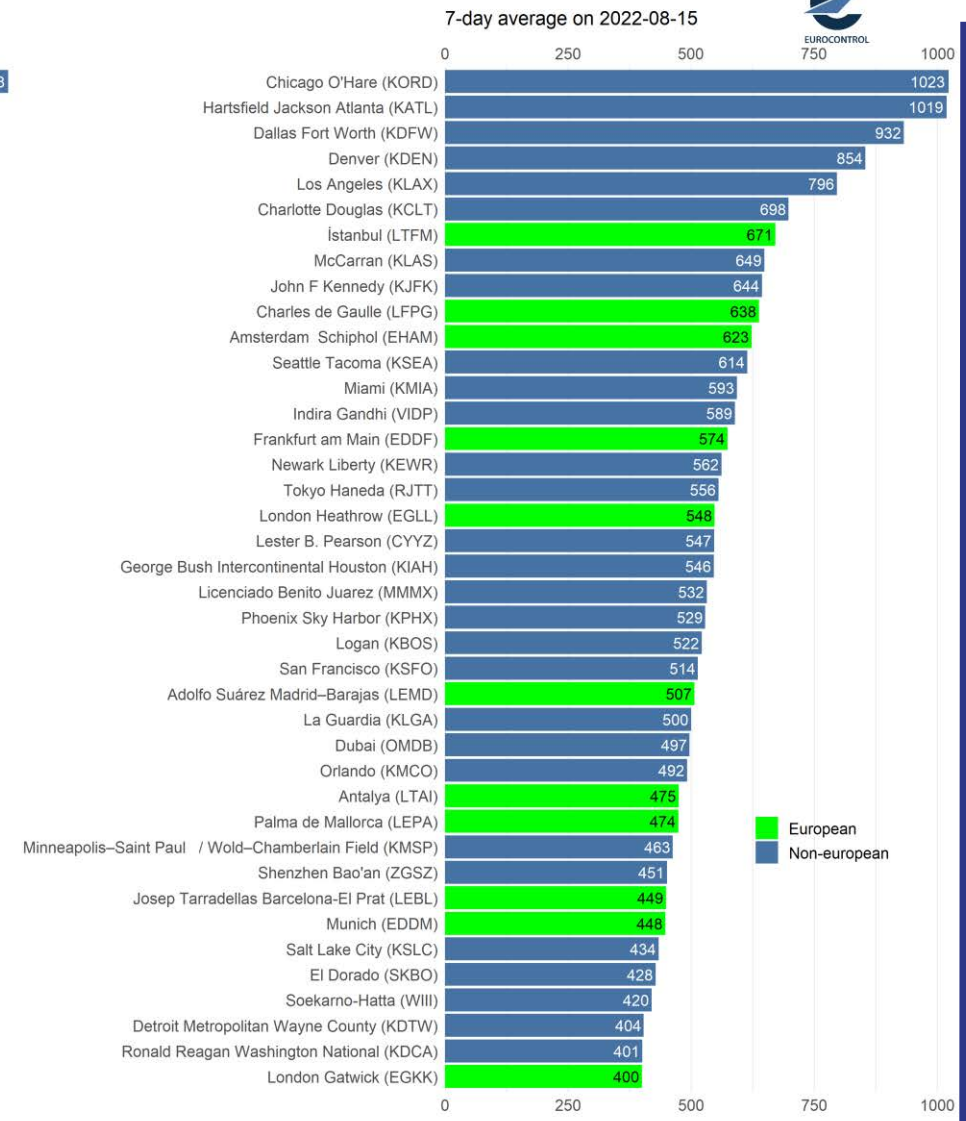


- Highest decreases in flights vs the previous week for **Barcelona** (-3%), **Nice** (-5%), **Milan/Malpensa** (-3%), **London/Gatwick** (-2%), **Malaga** (-4%), **Copenhagen** (-2%), **Cologne/Bonn** (-3%) and **Athens** (-2%).
- Highest increases for **Stockholm/Arlanda** (+5%), **Oslo** (+3%) and **Brussels** (+2%).
- Traffic levels ranging from -34% (Milan) to +2% (Palma) compared to 2019.



Top 40 Global airports (Average Daily Departure flights for the last week)



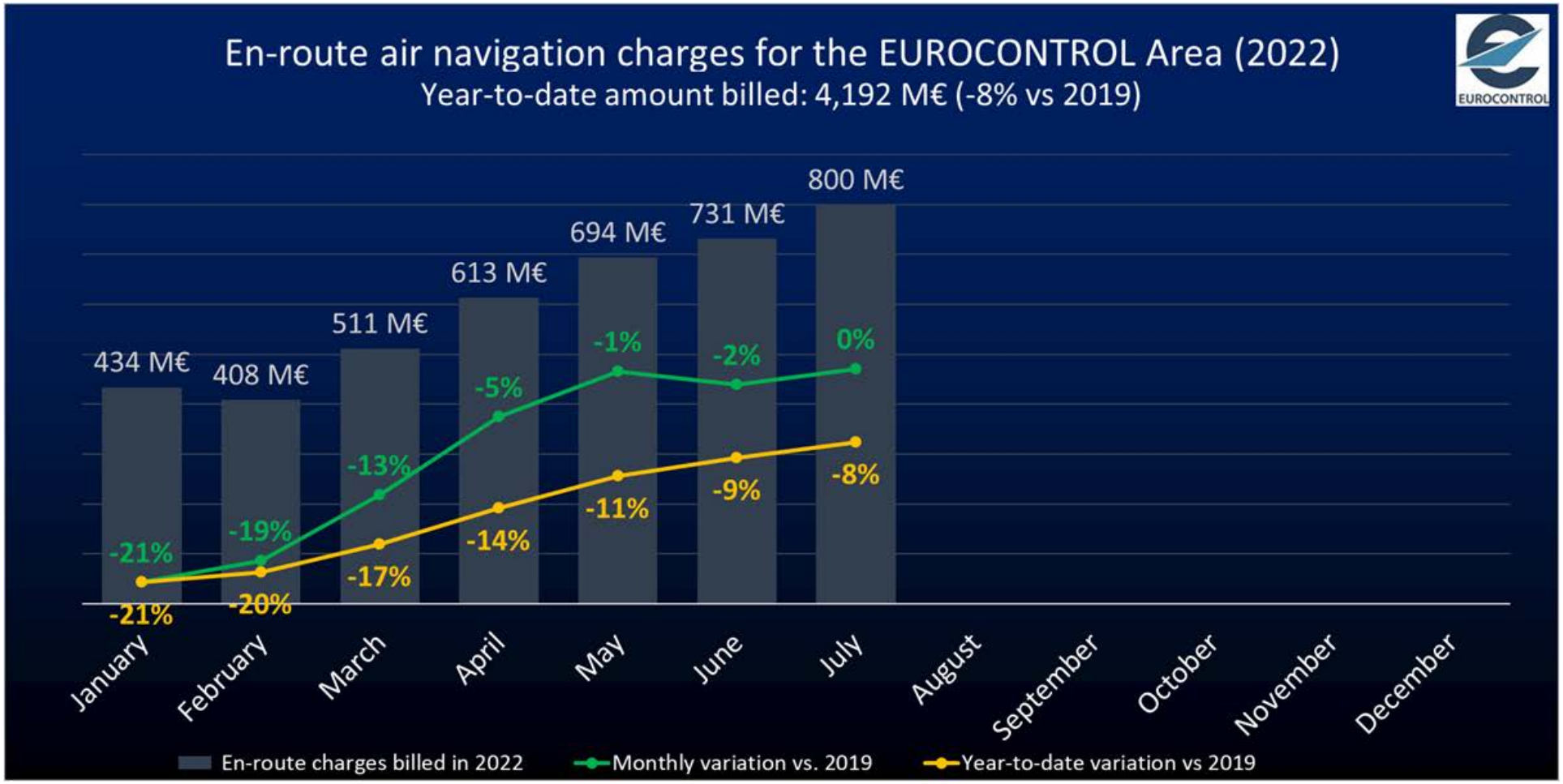


Source: Flightradar24 Historical Global Utilisation data

Comparing week ending 15 August (right) with the same week in 2019 (left):

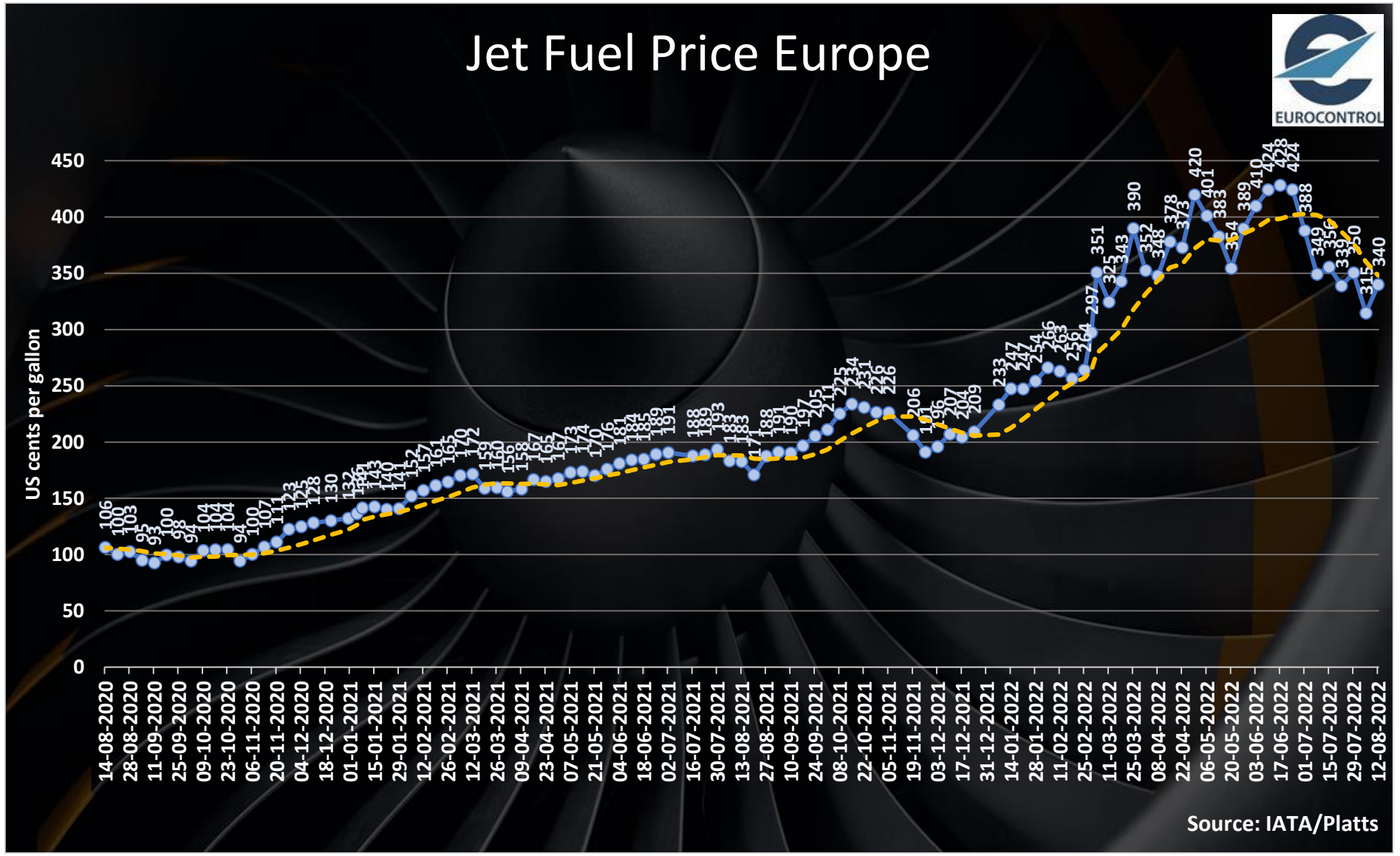
- **11 European airports** are ranked in the **Top 40** global airports (vs 8 in 2019)
- **Two European airports** are in the Top 10: Istanbul IGA (7th) and Paris/CDG (10th).
- Amsterdam, Frankfurt and London Heathrow are in the **Top 18**.
- Ten of the Top 15 global airports are currently **based** in **the US.**
- The **first Asian airport in 2022** is **New Delhi** (14th).

En-Route Air Navigation charges



- **EUROCONTROL** has billed **800M€** of en-route charges for July flights.
- This is **equivalent to** the amount billed for the July 2019 flights.
- On a year-to-date basis, EUROCONTROL billed **4,192M€** which is **-8% vs 2019**

Economics



- **Jet fuel prices** decreased to 340 cts/gallon on 12 August (-3% over two weeks, +46% since early January).
- **Jet fuel** prices reduced in July-August to average 348 cts/gallon amid economic recession fears that would slower demand.

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