12 January 2023

EUROCONTROL

Comprehensive Assessment

EUROPEAN AVIATION

SUPPORTING EUROPEAN AVIATION

Headlines (Week of 05 – 11 January 2023)

- The **network recorded 22,408 daily flights** on average over the past week (**+1%** on **previous week**), 86% of 2019 levels.
- Network traffic (flights) is just above the **base of EUROCONTROL Traffic Scenarios: 87%** for **January** so far (vs 2019).
- Overall, traffic levels have slightly increased compared to the previous week.
- **Ryanair** was the busiest Aircraft operator with 2,243 flights per day on average **(+9%** vs 2019) over the last week, followed by **Turkish Airlines** (1,280; +5%), **easyJet** (1,027; -27%), **Lufthansa** (979; -23%), **Air France** (908; -19%), **Wizz Air** (742; +37%) and **British Airways** (720; -11%).
- Intra-European traffic is **-11% below** 2019 levels. Domestic flows within China (-46%) and Middle-East (+8%).
- IGA Istanbul remains the busiest airport within the network (1,260 flights) and is ranked 9 globally.
- **Arrival punctuality** (within 15 min.) is ~**79%** while **departure punctuality** is ~**74%**, both below 2019 levels.
- As is normal in winter, **ATFM delays are relatively low**, although they did slightly increase over the busier end-of-year period.
- The **US outage** of the **ATC system** yesterday resulted in only **limited delays** to transatlantic traffic.
- **Jet fuel prices stabilised at 287 cts/gallon** on 6 January 2023.

Traffic Situation

Average daily flights (including overflights)

On week 05 - 11 Jan 2023

86% of equivalent week in 2019

Top 10 Aircraft Operators

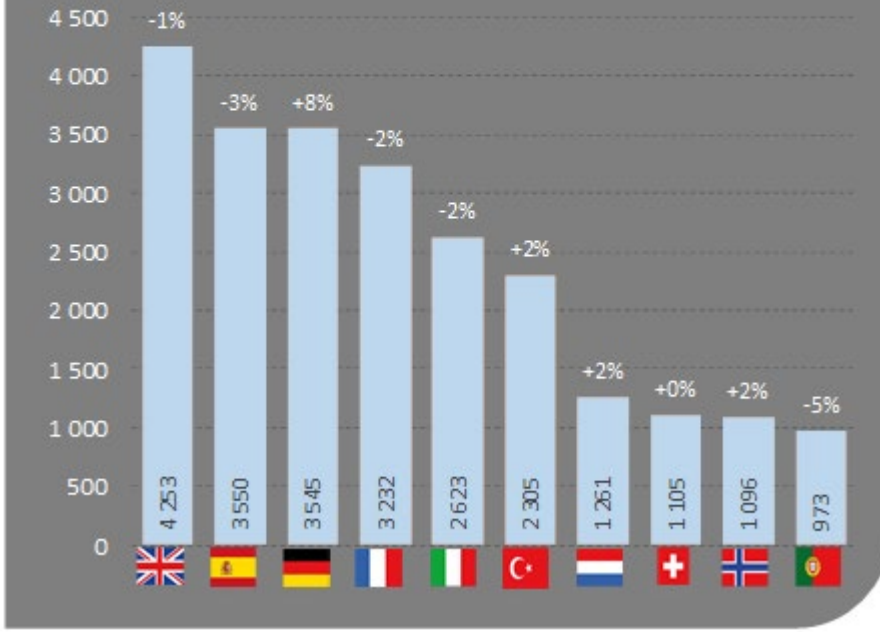
on Week 05 - 11 Jan 2023 (avg daily flights)

1. Ryanair Group	Operated 2 243 flights	↑9% vs same week in 2019	↓3% vs prev week
2. Turkish Airlines	Operated 1 280 flights	↑5% vs same week in 2019	↑3% vs prev week
3. easyJet Group	Operated 1 027 flights	↓27% vs same week in 2019	↓19% vs prev week
4. Lufthansa Airlines	Operated 979 flights	↓23% vs same week in 2019	↑11% vs prev week
5. Air France Group	Operated 908 flights	↓19% vs same week in 2019	↓5% vs prev week
6. Wizz Air Group	Operated 742 flights	↑37% vs same week in 2019	↓5% vs prev week
7. British Airways Grp	Operated 720 flights	↓11% vs same week in 2019	↑6% vs prev week
8. KLM Group	Operated 635 flights	↓14% vs same week in 2019	↓1% vs prev week
9. Vueling	Operated 472 flights	↑1% vs same week in 2019	↓8% vs prev week
10. SAS Group	Operated 464 flights	↓29% vs same week in 2019	↑19% vs prev week

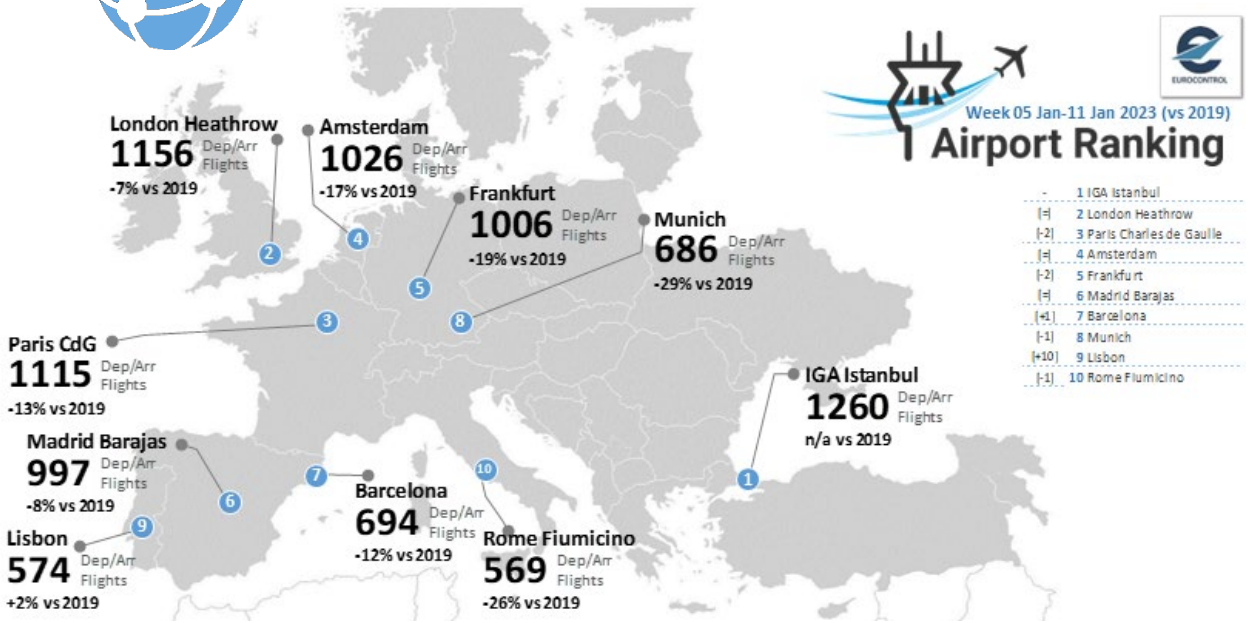
Top 10 Busiest States

on week 05 - 11 Jan 2023 (avg daily flights)

(Dep/Arr flights and comparison with previous week)



TOP 10 AIRPORTS, FLOWS AND MARKET SEGMENTS



Market Segments

on week 05 – 11 Jan 2023 (vs 2019)

- ↓17% Low cost
- ↓14% Mainline
- ↓19% Regional
- ↑7% Business Aviation
- ↓10% Non-Scheduled/ Charter
- ↑4% All Cargo

Traffic Flow

Average daily flights on week of 05 - 11 Jan 2023

	Flights	vs previous week	vs 2019
Intra-European	16 938	+2%	-11%
Intercontinental	4 713	-0%	-13%

Route charges

Nov. 2022

Amount billed:

€ 559 million

↑ +1%

vs. Nov. 2019

Source: EUROCONTROL

Economics

06 Jan. 2023

Avg Fuel price:

287 cents/gallon

→ **stable**

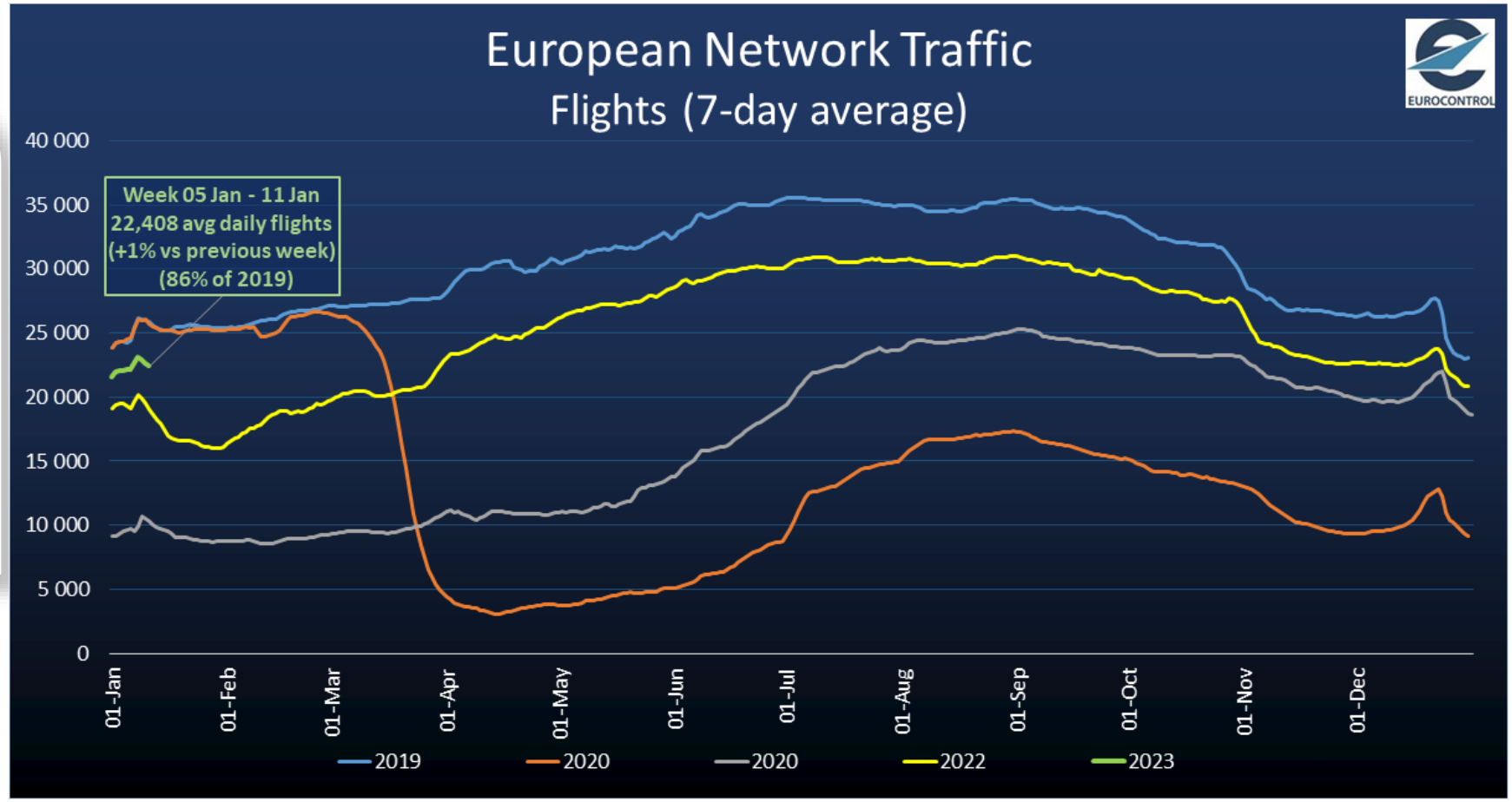
vs. 16 Dec. 2022

Source: IATA/Platts

OVERALL TRAFFIC SITUATION AT NETWORK LEVEL

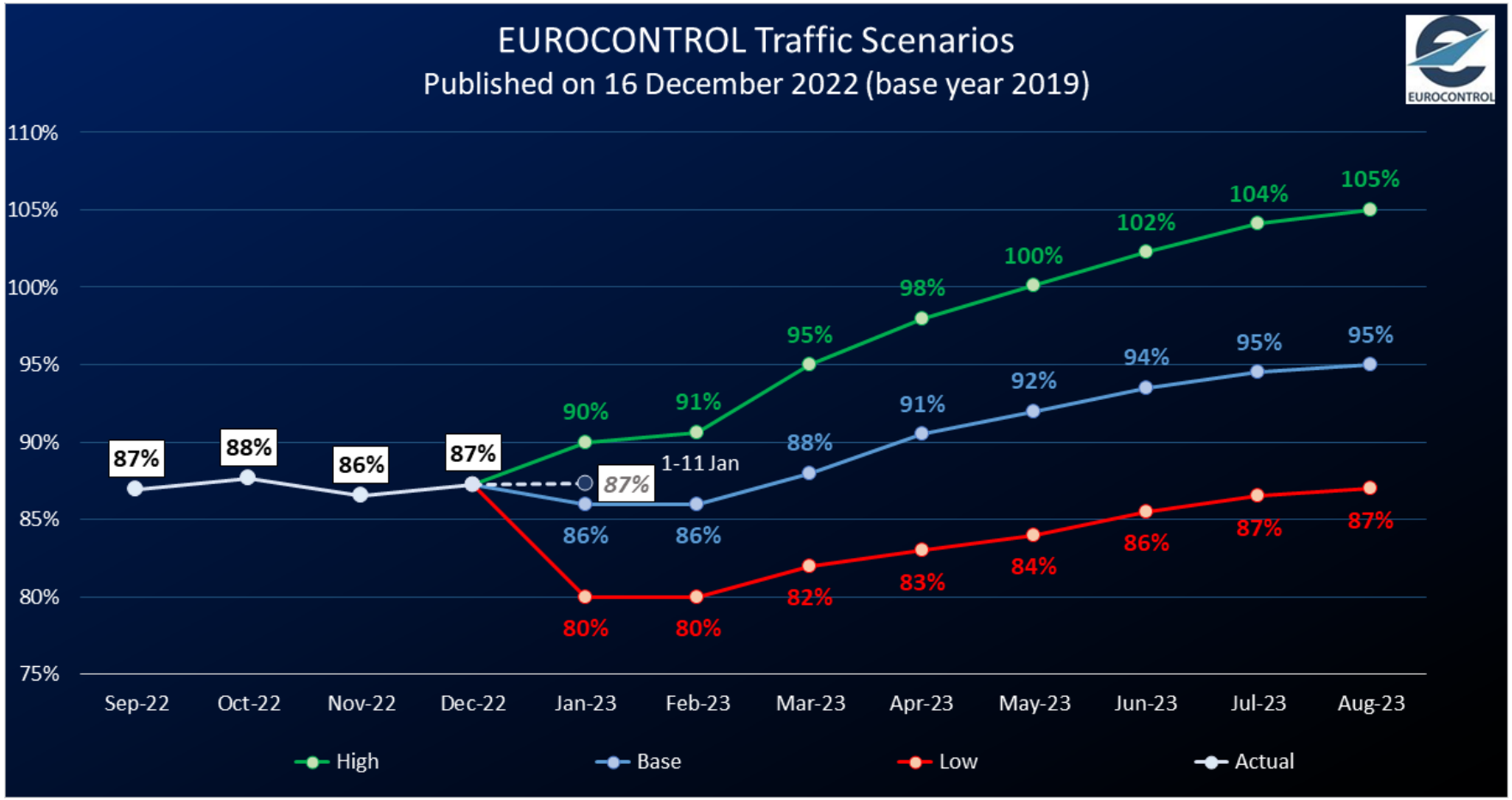
On week 05 – 11 January:

- **22,408** average daily flights.
- **+1%** on previous week.
- **86%** of 2019 traffic levels.

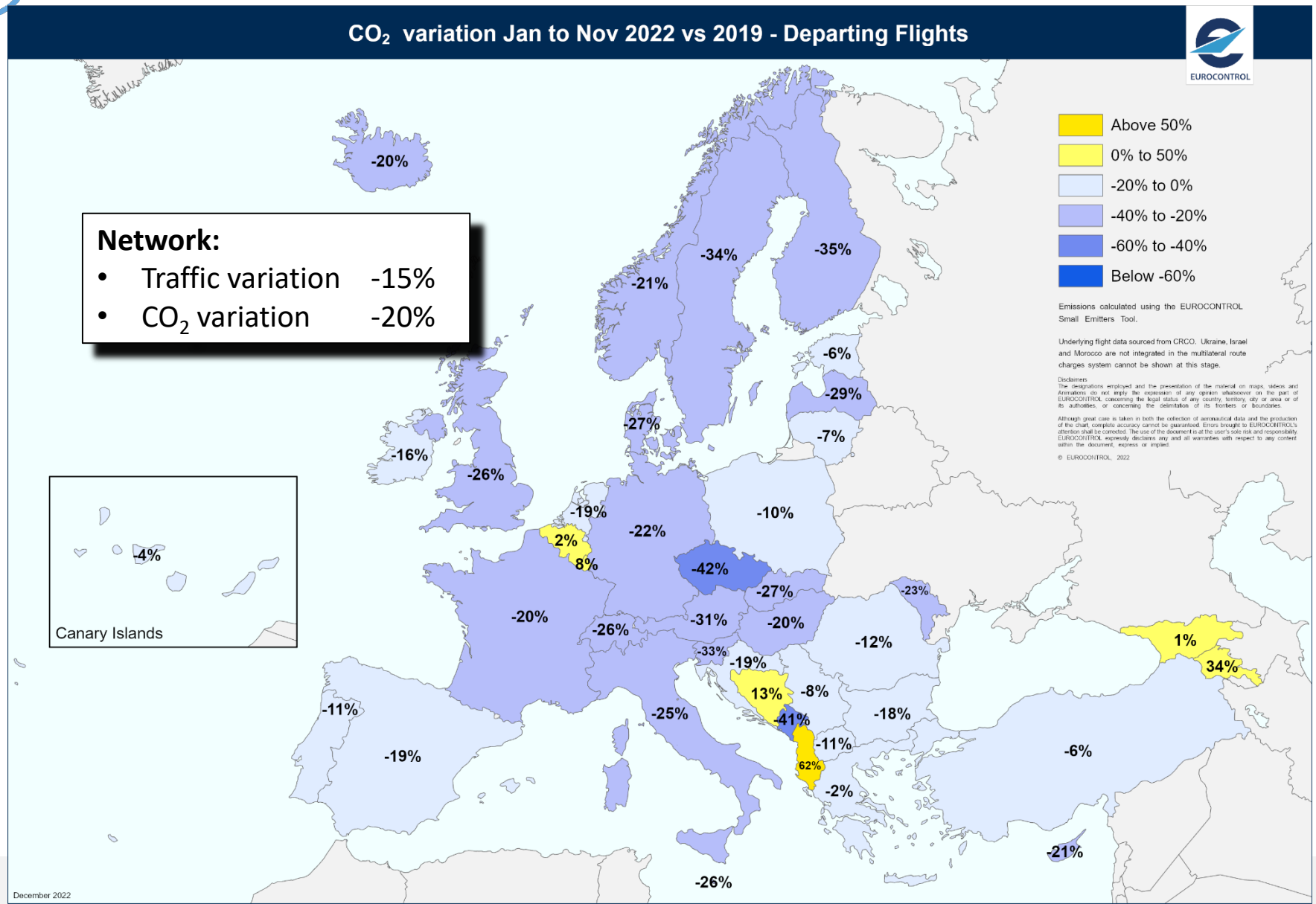


OVERALL SITUATION COMPARED TO THE EUROCONTROL TRAFFIC SCENARIOS

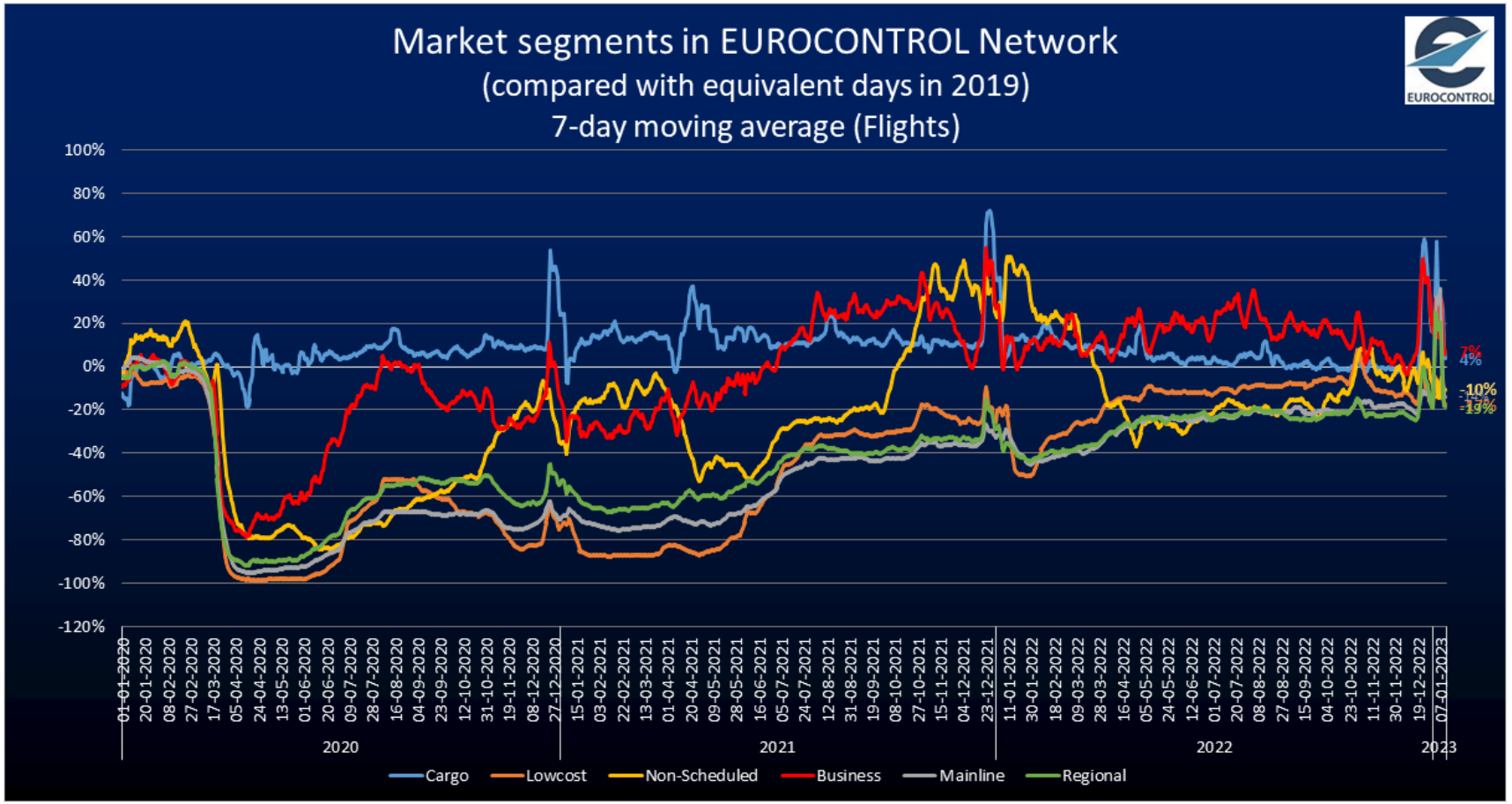
- The last EUROCONTROL Traffic Scenarios were published on 16 December 2022.
- For the first 11 days on the month, traffic is currently just above the base scenario, at **87%** of 2019 levels.
- For 2022, network traffic stood at **83**% of 2019 in the base scenario (see 7-year forecast).



AVIATION SUSTAINABILITY



MARKET SEGMENTS



NB: The comparison with 2019 over the Christmas break period is made difficult due to calendar effects.

Until the 11th of January 2023, compared to **2019**:

- **Business Aviation** (+7%) and **All-cargo** (+8%) are the only two segments recording traffic constantly above 2019 levels.
- **Charter** (-10%) was recording more traffic than in 2019 early 2022, then stepped back with the start of the war in Ukraine but is now improving.
- **Low-Cost** (-17%) has been **recovering steadily** in 2022. Pace of recovery has reduced since the start of the winter schedules.
- **Mainline** and **Regional** (-14% and -19% respectively) have been **recovering** at **a slower pace than low-cost.**

AIRCRAFT OPERATORS (AVERAGE DAILY FLIGHTS FOR THE LAST WEEK)

Rank evolution over 1 week	Top 10 Aircraft Operators - Week 05 - 11 Jan 2023				
	Aircraft Operator	Average daily flights	Δ over 1 week	% over 1 week	% vs 2019
→	Ryanair Group	2 243	-58	-3%	+9%
↗	Turkish Airlines	1 280	+43	+3%	+5%
↘	easyJet Group	1 027	-238	-19%	-27%
↗	Lufthansa Airlines	979	+95	+11%	-23%
↘	Air France Group	908	-45	-5%	-19%
→	Wizz Air Group	742	-36	-5%	+37%
→	British Airways Group	720	+38	+6%	-11%
→	KLM Group	635	-5	-1%	-14%
→	Vueling	472	-40	-8%	+1%
→	SAS Group	464	+73	+19%	-29%

- **Ryanair** is the busiest Aircraft Operator with 2,243 flights per day on average (-3% vs 2019) over last week, followed by **Turkish Airlines** (1,280; +3%), **easyJet** (1,027; -19%), **Lufthansa** (979; +11%), **Air France** (908; -5%), **Wizz Air** (742; -5%) and **British Airways** (720; +6%).

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

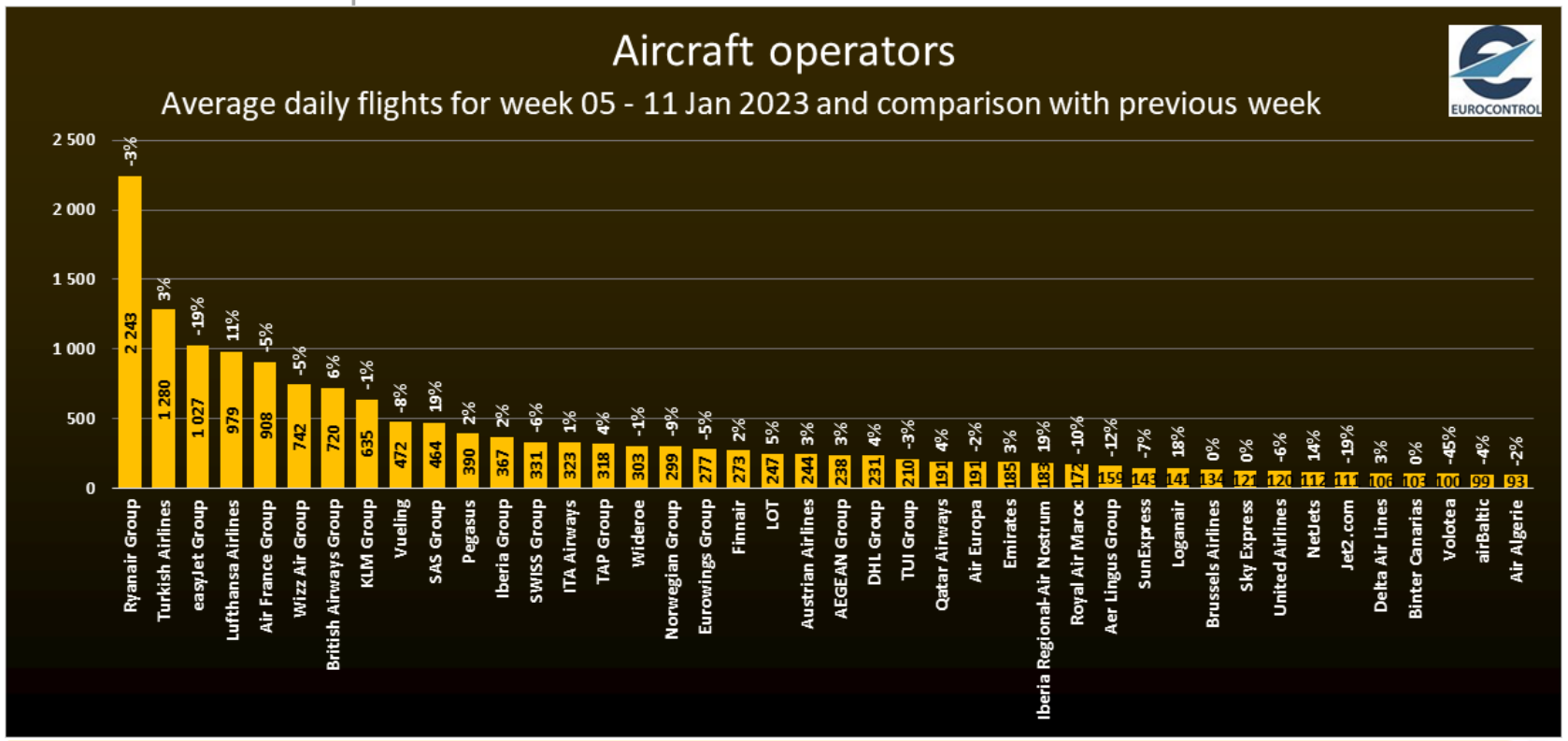
- **Lufthansa** (+95 flights; +11%) mainly due to domestic flows, and flows between Germany and Poland, Italy, France and Switzerland.
- **SAS** (+73 flights; +19%) mainly due to domestic flows in Norway, Sweden, Denmark and flows between the three states.
- **Turkish Airlines** (+43 flights; +3%) mainly due to flows in Türkiye as well as flows between Türkiye and Germany, the US, North Macedonia and France.
- **British Airways** (+38 flights; +6%) mainly due to domestic flows in UK as well as flows between the UK and Germany, Switzerland and the US.

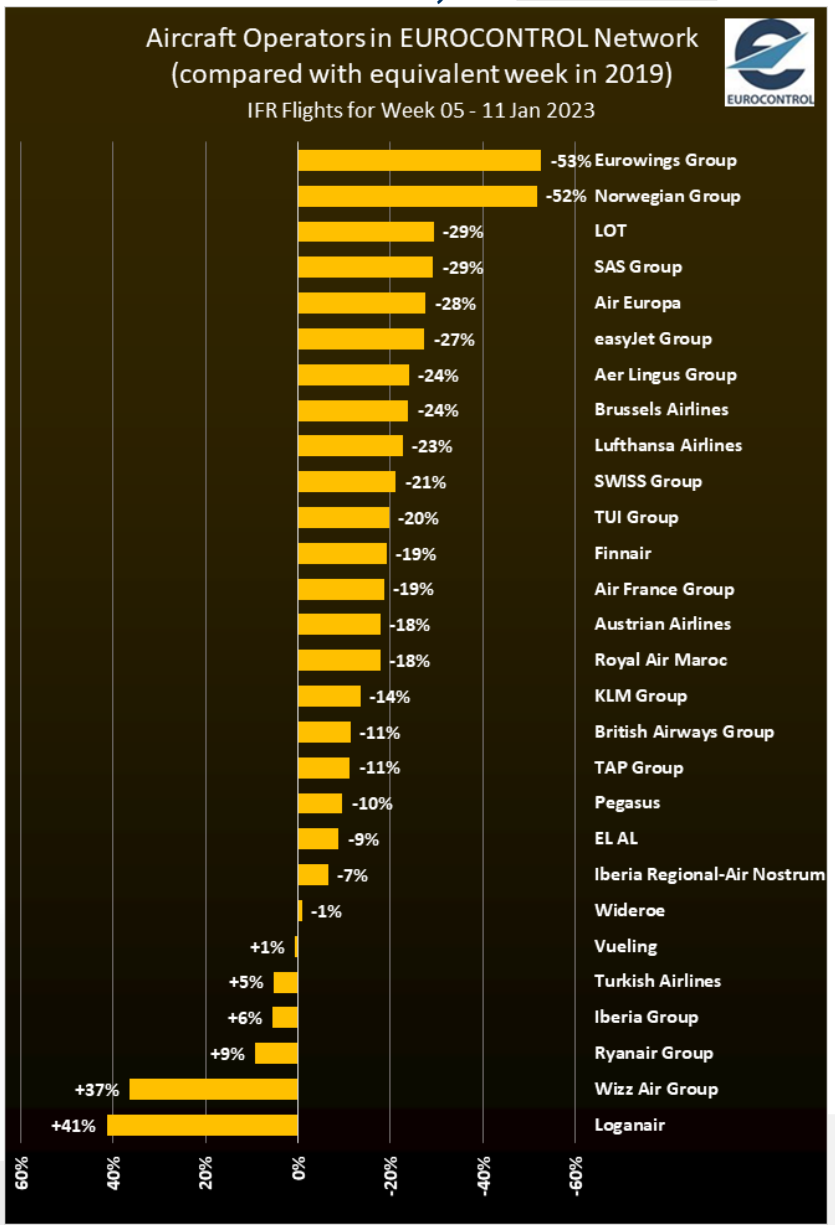
Biggest decrease for:

- **easyJet** (-238 flights; -19%) **mainly due to decreases** on domestic flows in France and UK, and on flows between UK and Spain/France as well as flows France-Italy.

AIRCRAFT OPERATORS (AVERAGE DAILY FLIGHTS FOR THE LAST WEEK)

Top 40



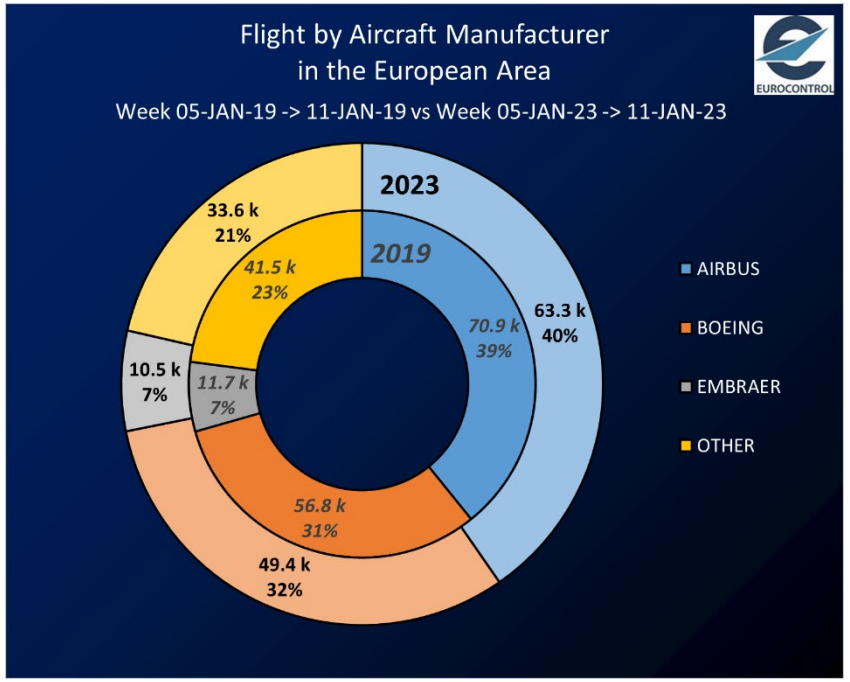


- Highest increases in flights compared to previous week for **Lufthansa** (+11%), **SAS** (+19%), **Turkish Airlines** (+3%), **British Airways** (+6%) and **Air Nostrum** (+19%).
- Largest decreases for **easyJet** (-19%), **Volotea** (-45%) and **Ryanair** (-3% due to strikes).
- Traffic levels ranging from -53% (**Eurowings***) to +41% (**Loganair**) vs 2019.

****Eurowings** (like **Norwegian**) recorded high increases during the comparable week of 2019.*

AIRCRAFT MANUFACTURERS (SHARE OF FLIGHTS FOR LAST WEEK)

Flights of the top 20 Aircraft operators



- **Airbus** reports that it delivered 661 commercial aircraft in 2022, 50 more than in 2020; 516 of these were from the A320 family. 820 orders were recorded.
- **Boeing** reports that it delivered 480 commercial aircraft in 2022, 140 more than in 2021; 387 of these were 737s. 774 orders were recorded.

- At European level, **40%** of all flights last week were operated by **Airbus** aircraft vs **32%** by **Boeing** aircraft.
- The situation varies for the top 20 aircraft operators. For these, Airbus' share was 51% while Boeing's share was 33%.

AIRCRAFT OPERATORS (AVERAGE DAILY FLIGHTS FOR THE LAST WEEK)

Cargo, Legacy, Low Cost and Regional Carriers

EUROCONTROL

PERFORMANCE OF MAJOR CARGO CARRIERS

for the week 5 - 11 January 2023

DHL
OPERATED 231 flights/day
+28% compared to the equivalent week in 2019

ASL AIRLINES BELGIUM
OPERATED 61 flights/day
-17% compared to the equivalent week in 2019

FedEx
OPERATED 54 flights/day
-2% compared to the equivalent week in 2019

UPS
OPERATED 51 flights/day
+12% compared to the equivalent week in 2019

PERFORMANCE OF MAJOR LONG-HAUL/LEGACY CARRIERS

for the week 5 - 11 January 2023

Lufthansa
OPERATED 979 flights/day
-23% compared to the equivalent week in 2019

TURKISH AIRLINES
OPERATED 1280 flights/day
+5% compared to the equivalent week in 2019

AIRFRANCE
OPERATED 908 flights/day
-19% compared to the equivalent week in 2019

BRITISH AIRWAYS
OPERATED 720 flights/day
-11% compared to the equivalent week in 2019

KLM
OPERATED 635 flights/day
-14% compared to the equivalent week in 2019

SAS
OPERATED 464 flights/day
-29% compared to the equivalent week in 2019

PERFORMANCE OF MAJOR LOW-COST CARRIERS

for the week 5 - 11 January 2023

RYANAIR
OPERATED 2243 flights/day
+9% compared to the equivalent week in 2019

easyJet
OPERATED 1027 flights/day
-27% compared to the equivalent week in 2019

Wizz
OPERATED 742 flights/day
+37% compared to the equivalent week in 2019

vueling
OPERATED 472 flights/day
+1% compared to the equivalent week in 2019

PEGASUS
OPERATED 390 flights/day
-10% compared to the equivalent week in 2019

Eurowings
OPERATED 277 flights/day
-53% compared to the equivalent week in 2019

PERFORMANCE OF MAJOR REGIONAL CARRIERS*

for the week 5 - 11 January 2023

widerøe
OPERATED 303 flights/day
-1% compared to the equivalent week in 2019

AIR NOSTRUM LINEAS AEREAS
OPERATED 183 flights/day
-7% compared to the equivalent week in 2019

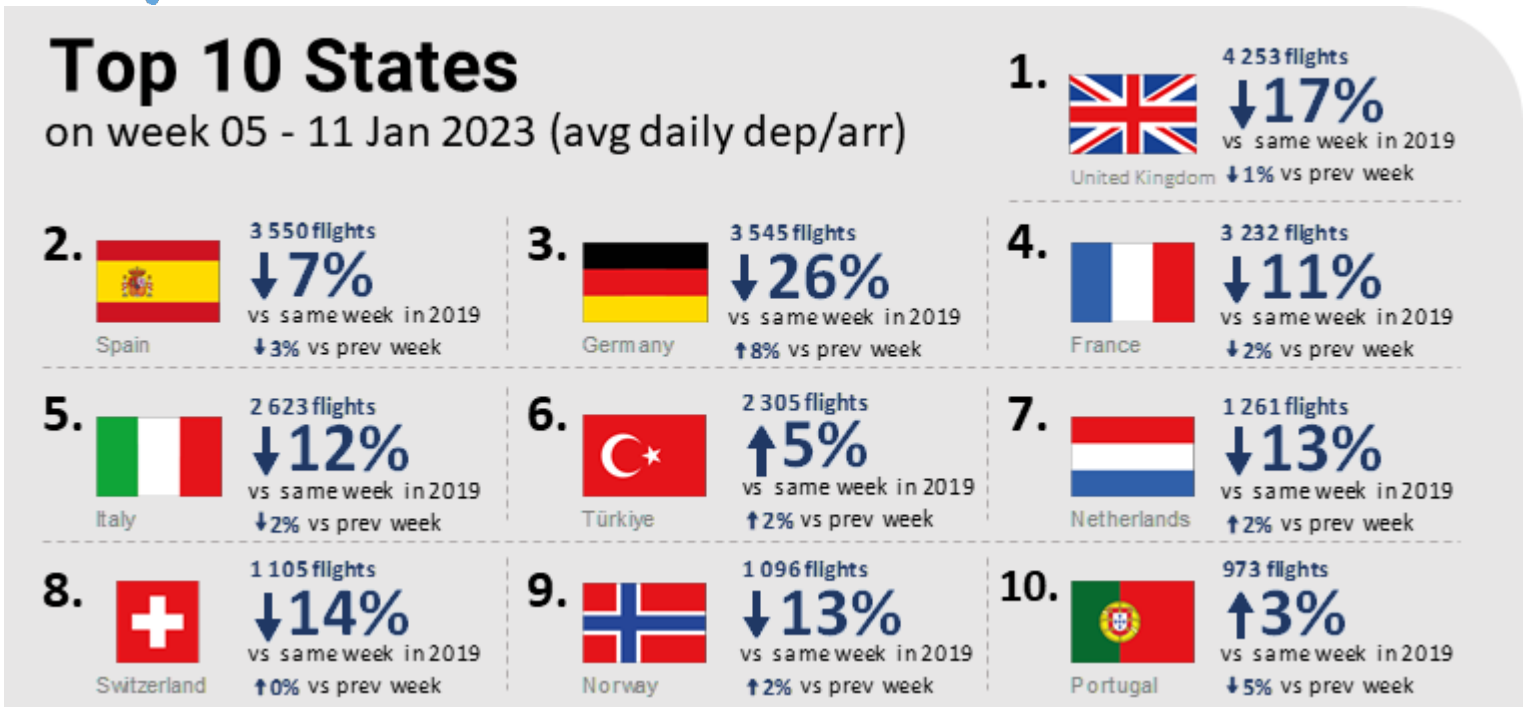
Loganair
Scotland's Airline
OPERATED 141 flights/day
+41% compared to the equivalent week in 2019

Binter
OPERATED 103 flights/day
+12% compared to the equivalent week in 2019

OLYMPIC AIR
OPERATED 45 flights/day
-64% 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 (4,253; -17% vs 2019) followed by **Spain** (3,550; -7%), **Germany** (3,545; -26%), **France** (3,232; -11%), **Italy** (2,623; -12%) and **Türkiye** (2,305; +5%).
- In this top 10, **Türkiye** (+5%) and **Portugal** (+3%) are the only States exceeding its 2019 traffic volumes.

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

- **Germany (+8%):** mainly due to more flights operated by Lufthansa and light AOs. On domestic flows, and flows with France, Switzerland, UK and Poland.
- **Türkiye (+2%)**: mainly due to Turkish Airlines and Pegasus. On domestic flows as well as flows with Germany, Russia, Serbia and Uzbekistan.

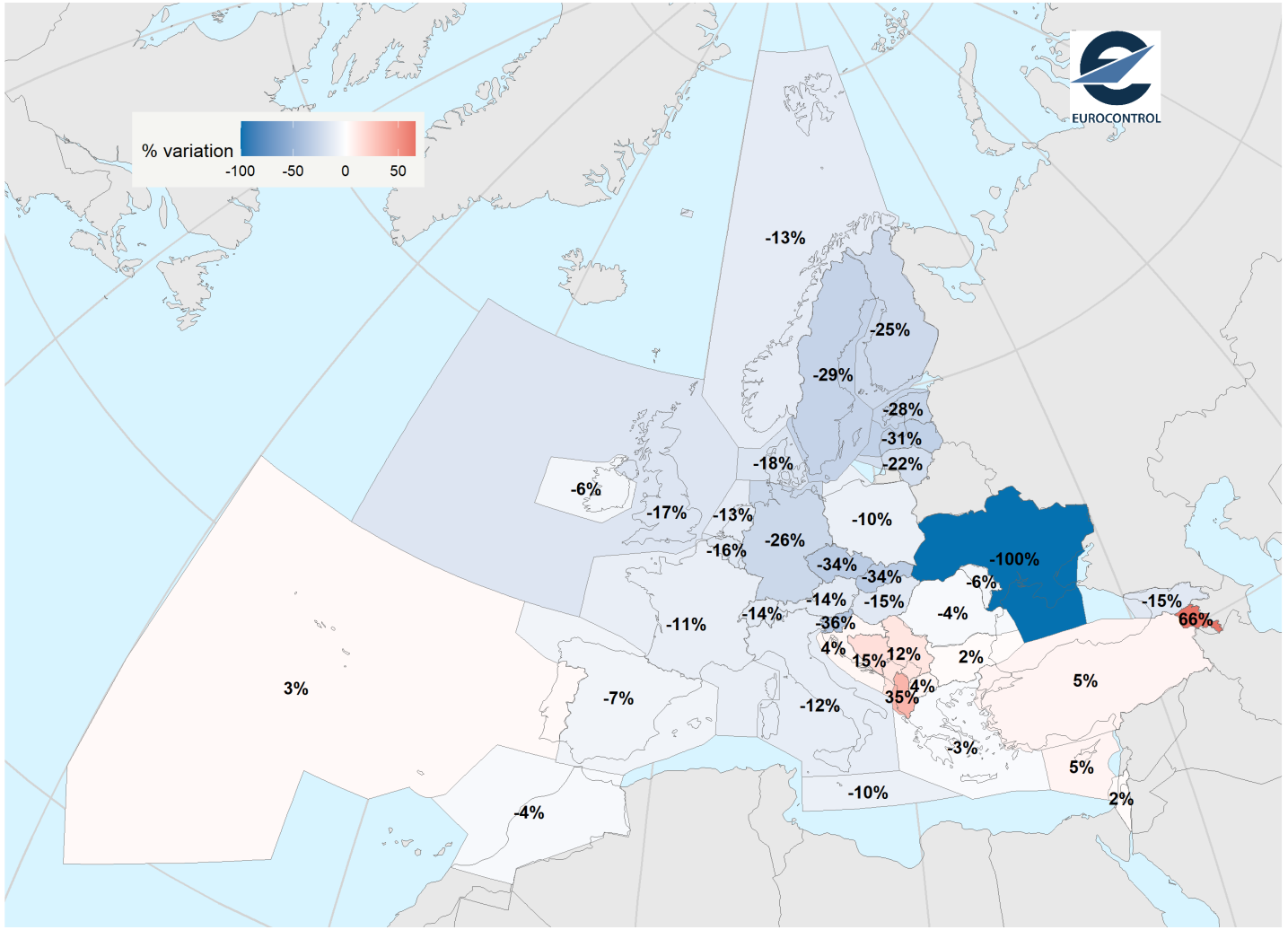
Decreases for:

- **Spain (-1%):** mainly due to Vueling, easyJet and Ryanair. On flows with the UK, France, Switzerland and Germany.
- **Italy (-2%) :** mainly due to easyJet, Volotea and Wizz. On flows with France, domestic flows as well as flows with UK and the Netherlands.

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

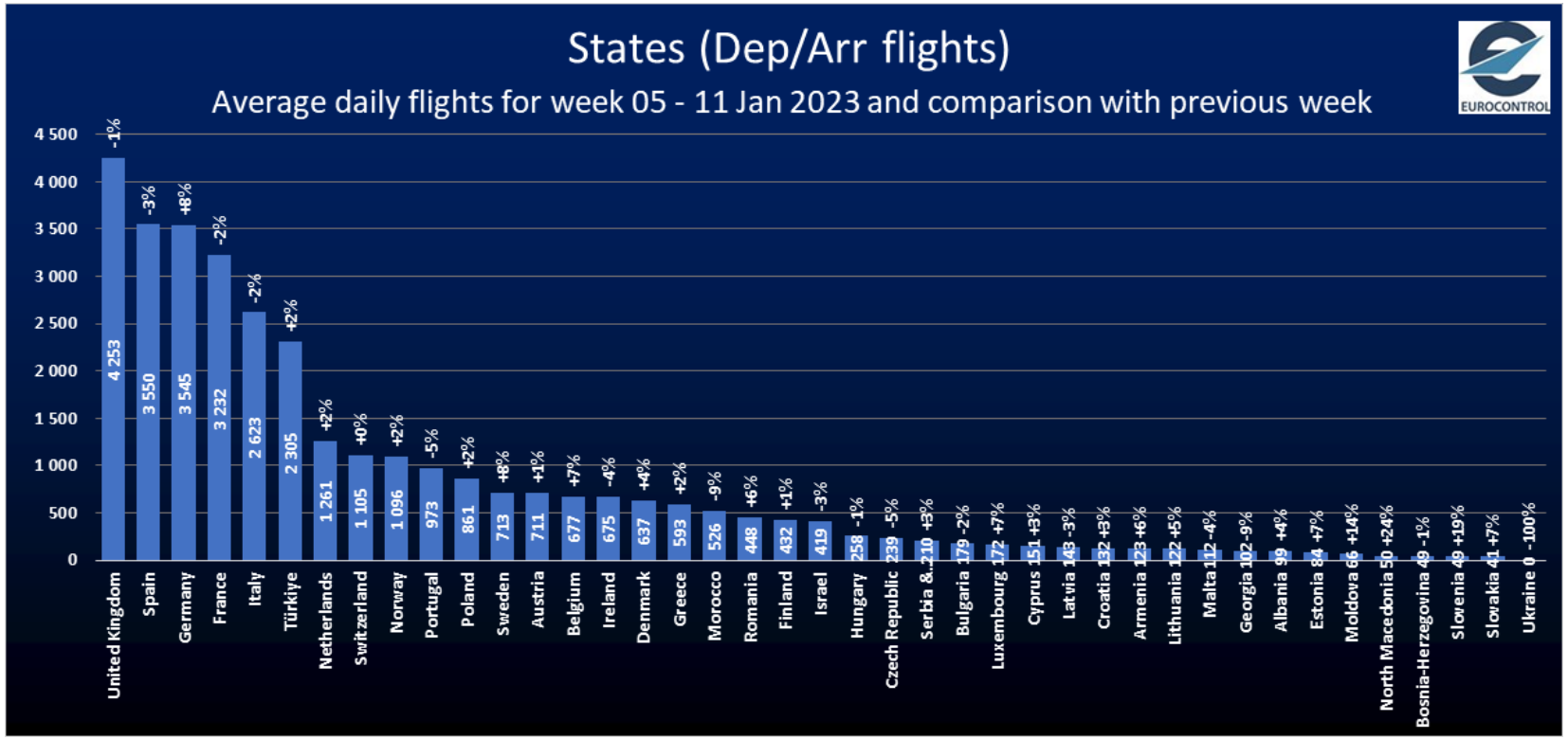
State FIR daily % arrivals/departures variation vs 2019 on 2023-01-11

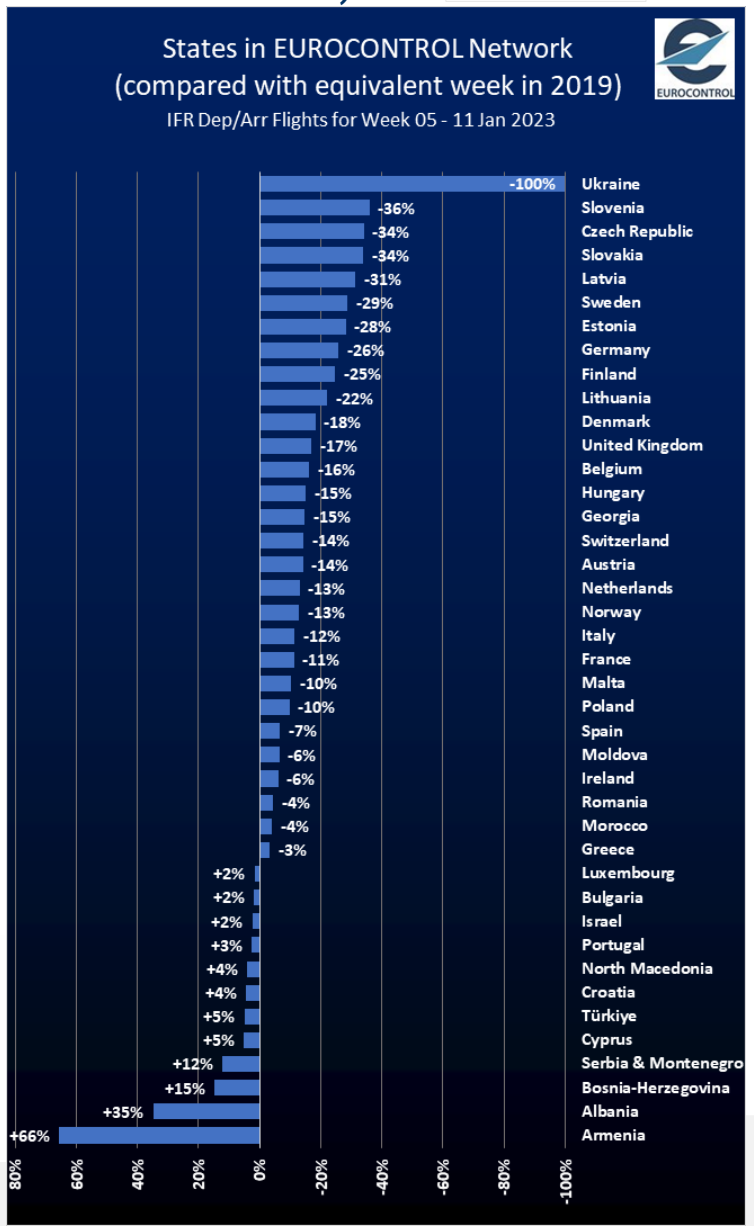
7-day average - FIRs at altitude FL200



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

EUROCONTROL Member States

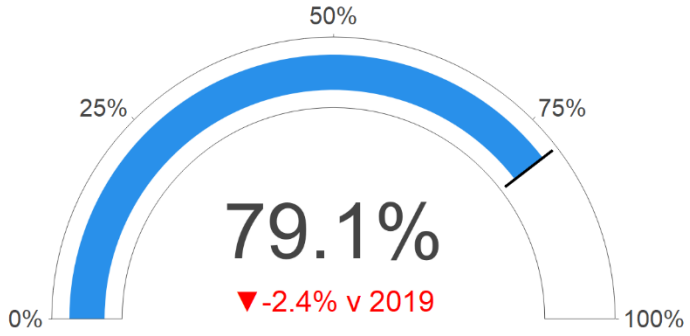




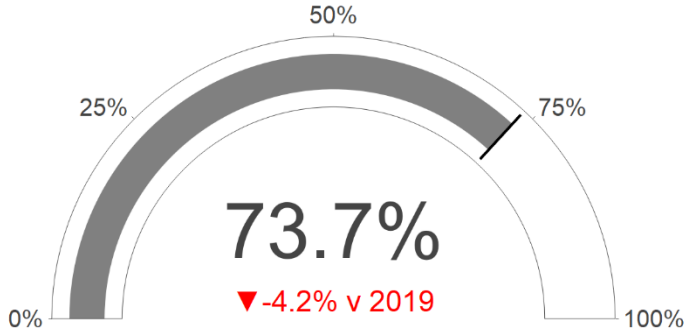
- Highest increases in flights vs previous week for **Germany** (+8%), **Sweden** (+8%), **Belgium** (+7%), **Türkiye** (+2%), the **Netherlands** (+2%) and **Denmark** (+4%).
- Largest decreases for **Spain** (-3%), **Italy** (-2%), **France** (-2%) and **Portugal** (-5%).
- Traffic levels ranging from -100% (**Ukraine**) to +66% (**Armenia**), compared to 2019.

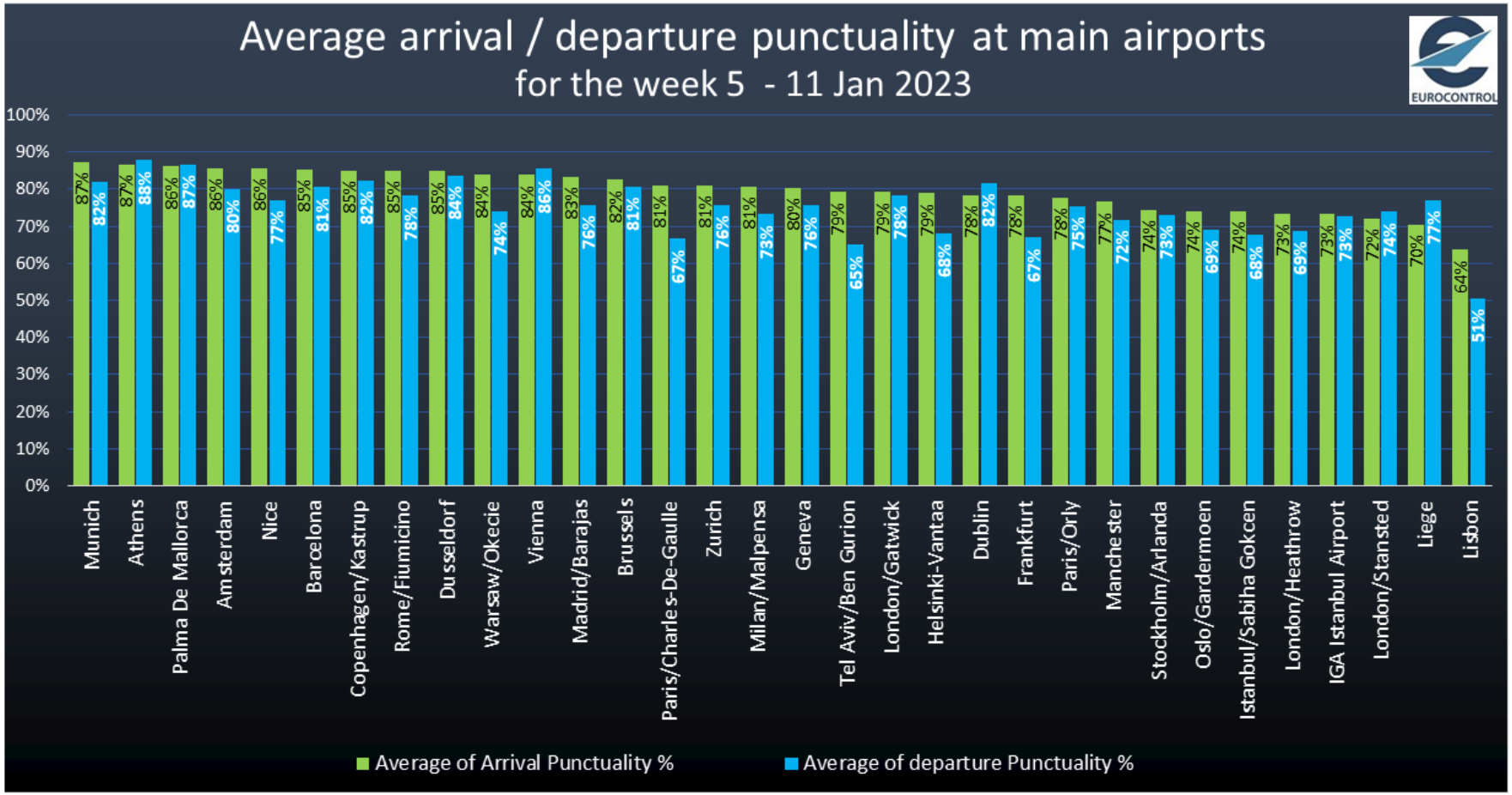
ARRIVAL & DEPARTURE PUNCTUALITY (AT TOP AIRPORTS FOR THE LAST WEEK)

Arrival punctuality (05 to 11/01)



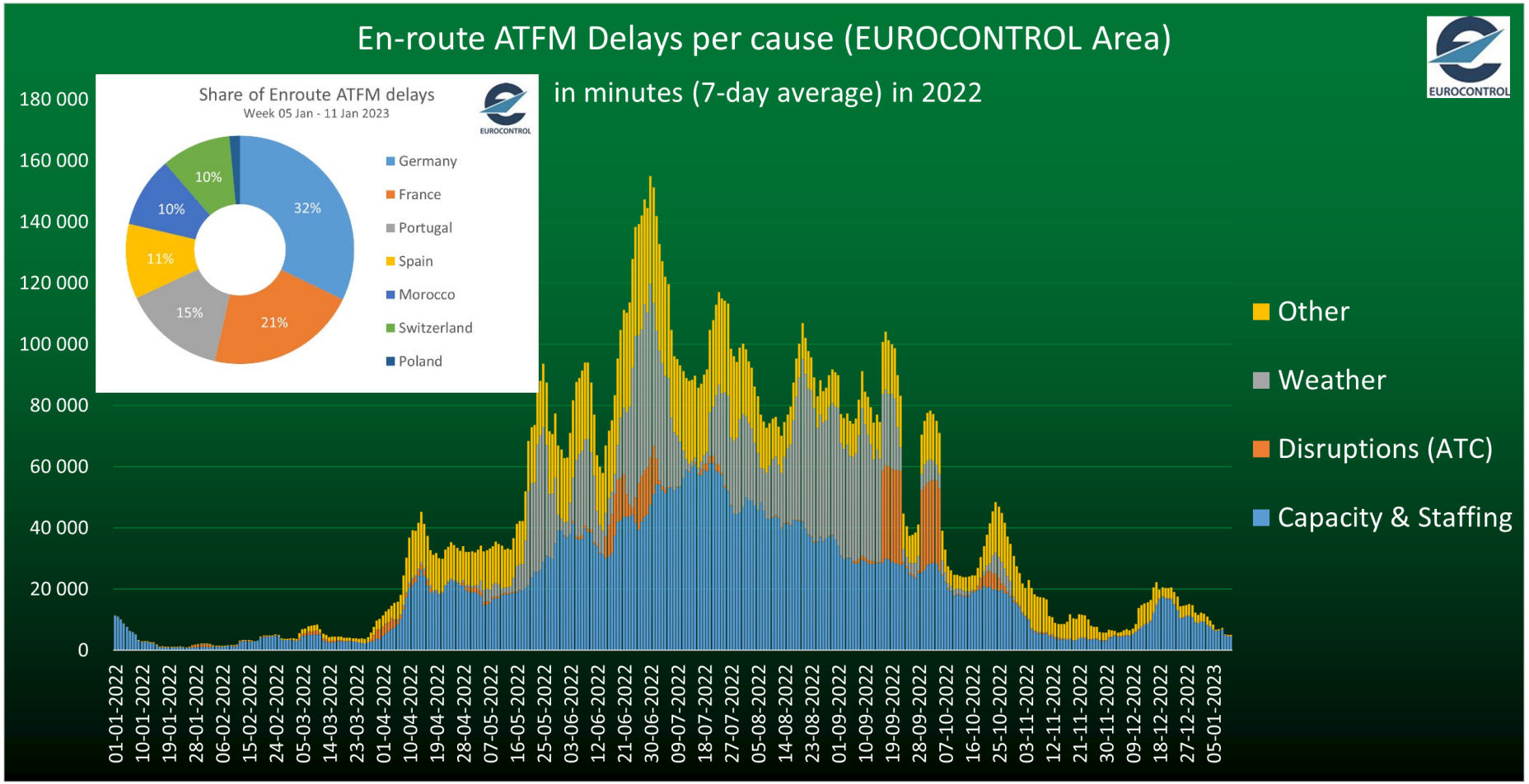
Departure punctuality (05 to 11/01)





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

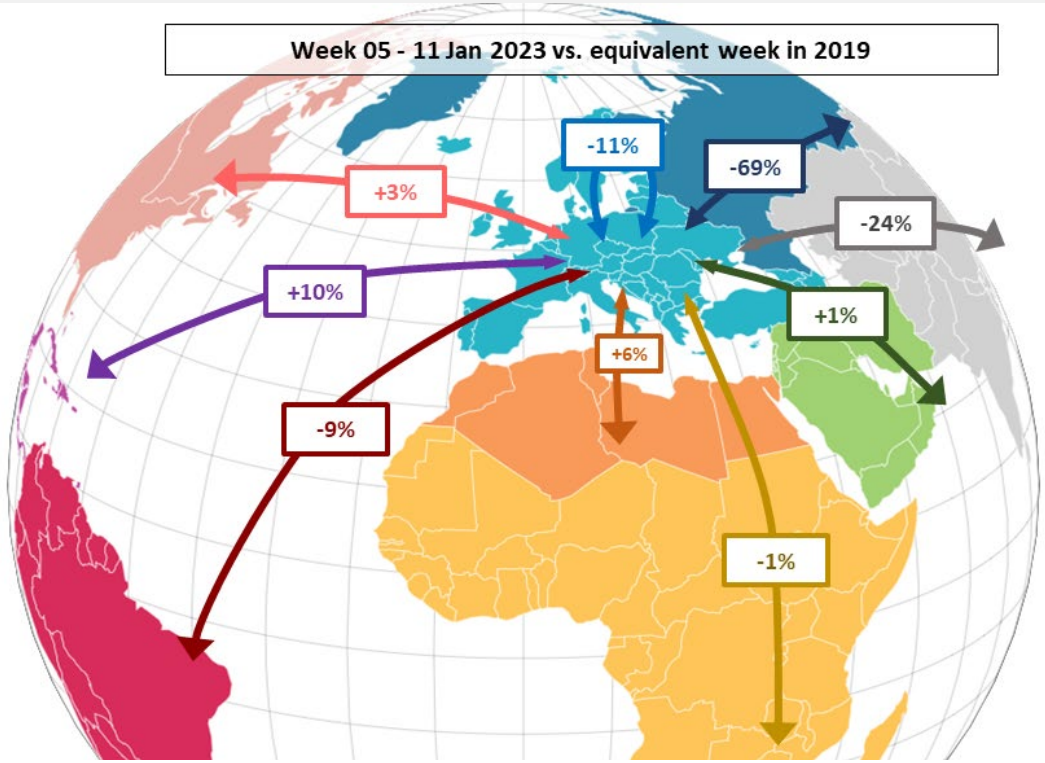
EN-ROUTE ATFM DELAYS



- Since the start of the Winter schedule, we observe a big reduction of ATFM delays at Network level.
- Delays have slightly increased during the Christmas break.
- Major contributors over the last 7 days: **Germany** (32% of all en-route ATFM delays), **France** (21%), **Portugal** (15%) **Spain** (11%) and **Morocco** (10%).

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

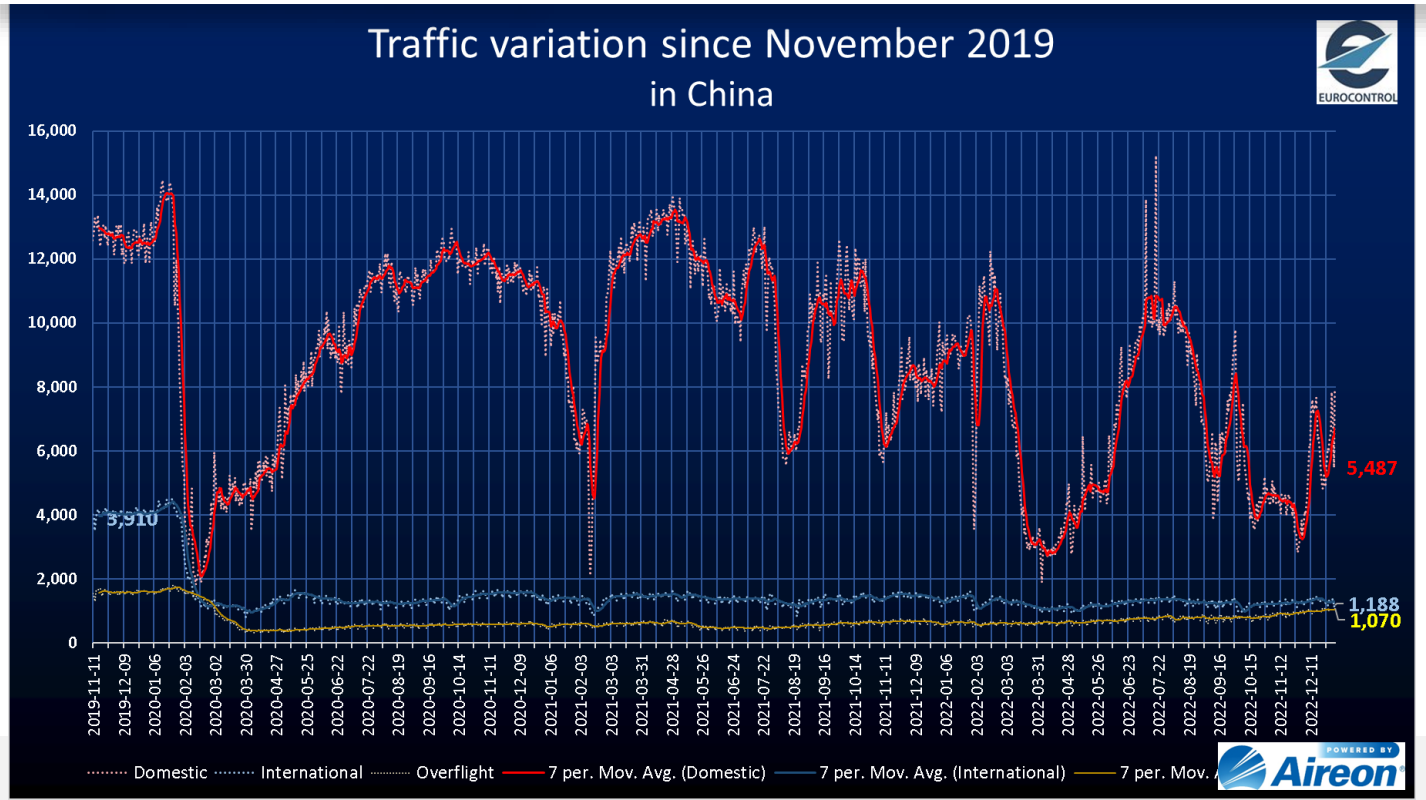
- The **main** traffic **flow** was **intra-European** with **16,938 flights** on average for the most recent week, +2% over the previous week.
- The **Inter-Continental** flow, recording **4,713** daily flights for the most recent week, in line with the previous week levels.
- Flows between **Europe** and **Other Europe** (incl. **Russia**) were at -69% compared to 2019.
- Flows between **Europe** and **Asia/Pacific** were at -24% compared to 2019. Flows from, to and within China are still severely depressed (see next slide).

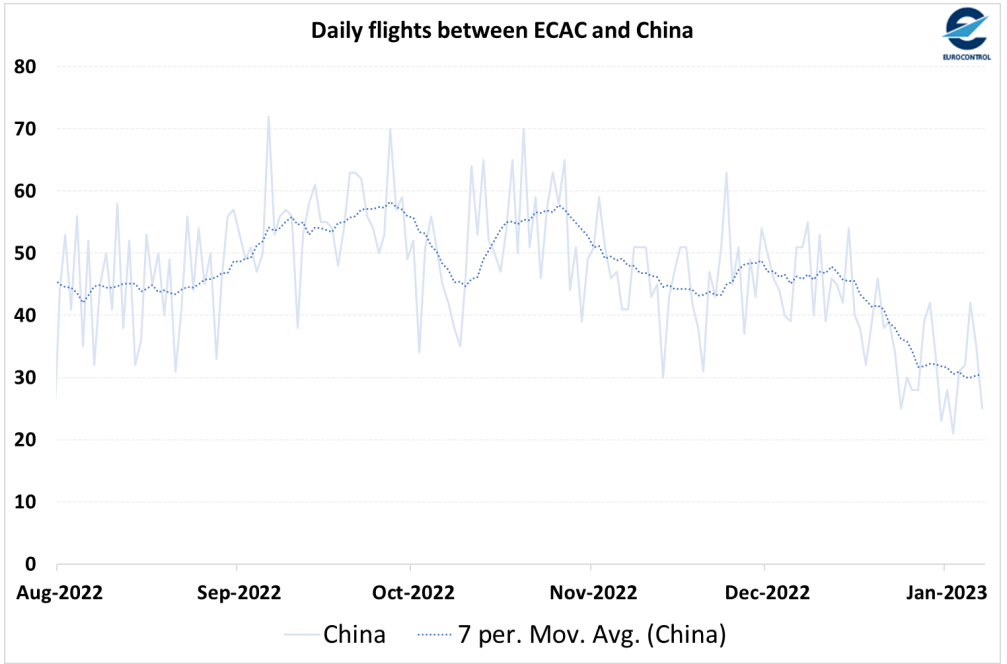


REGION (Average daily flights)	Week 29/12/2022 - 04/01/2023	Week 05/01/2023 - 11/01/2023	%	vs. 2019
Intra-Europe	**16 587**	**16 938**	***+2%***	***-11%***
Europe<->Asia/Pacific	551	588	*+7%*	*-24%*
Europe<->Mid-Atlantic	208	213	*+2%*	*+10%*
Europe<->Middle-East	1 295	1 281	*-1%*	*+1%*
Europe<->North Atlantic	918	933	*+2%*	*+3%*
Europe<->North-Africa	1 039	945	*-9%*	*+6%*
Europe<->Other Europe	250	265	*+6%*	*-69%*
Europe<->South-Atlantic	166	166	*-0%*	*-9%*
Europe<->Southern Africa	304	322	*+6%*	*-1%*
Non Intra-Europe	**4 733**	**4 713**	***-0%***	***-13%***

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

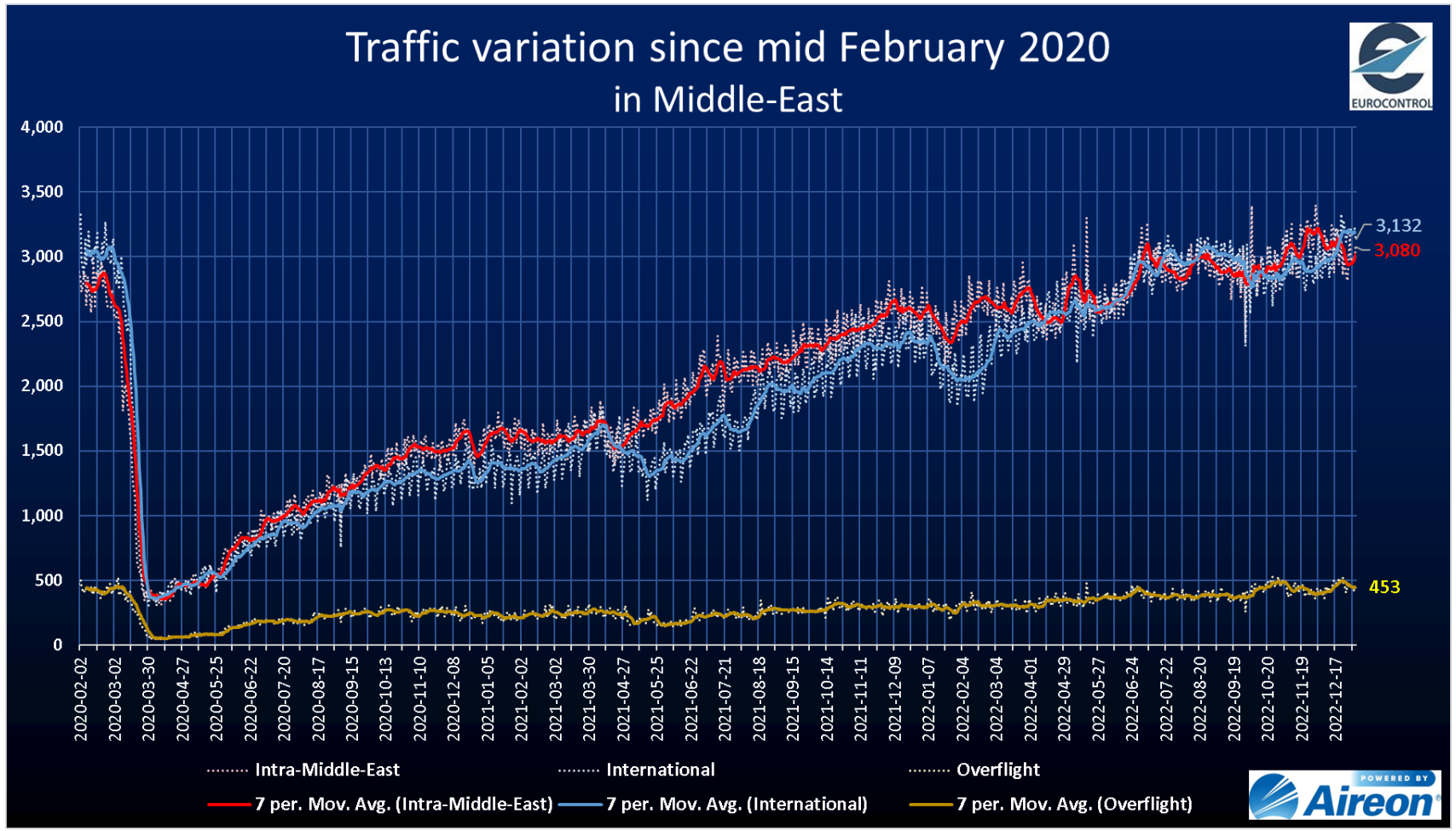
- Owing to the strict implementation of a zero-COVID-19 policy, China recorded a series of peaks and troughs vis-à-vis its number flights since 2020. On 2 January 2023, the number of domestic flights recorded circa 5,500 daily flights, an increase on the previous weeks but still a 33% decline (vs 1 Jan 2020).
- International flights stagnated, recording 1,188 flights early January (-71% compared to 1 Jan 2020). Overflights remained suppressed too with 1,070 flights (-33% vs 1 Jan 2020).





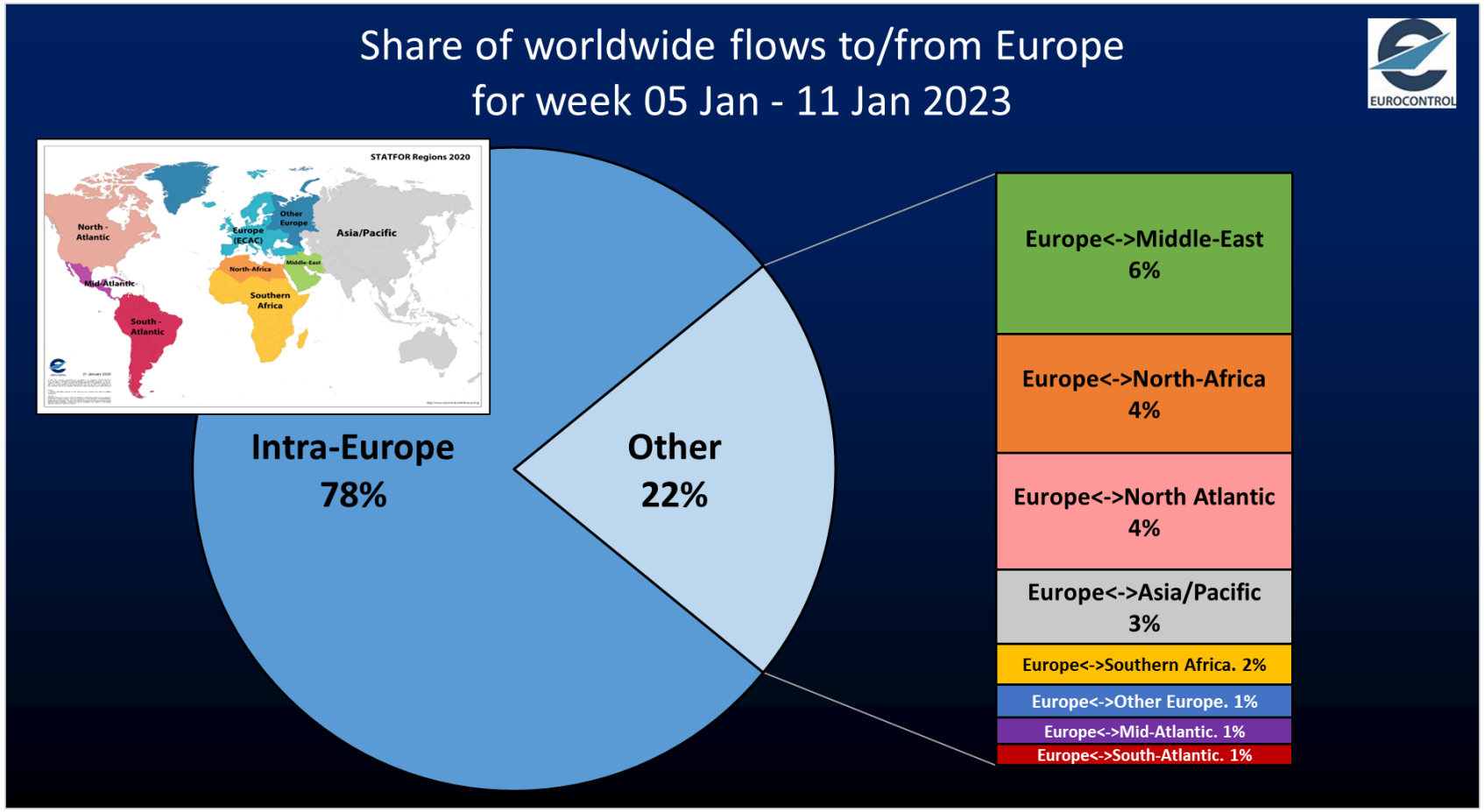
- Domestic **COVID restrictions** were **eased** in December and **entry restrictions** have also now been **relaxed**. However, this has not yet been reflected in traffic levels between Europe and China.

OUTSIDE EUROPE: SITUATION IN MIDDLE-EAST OVER THE 2019-2022 PERIOD



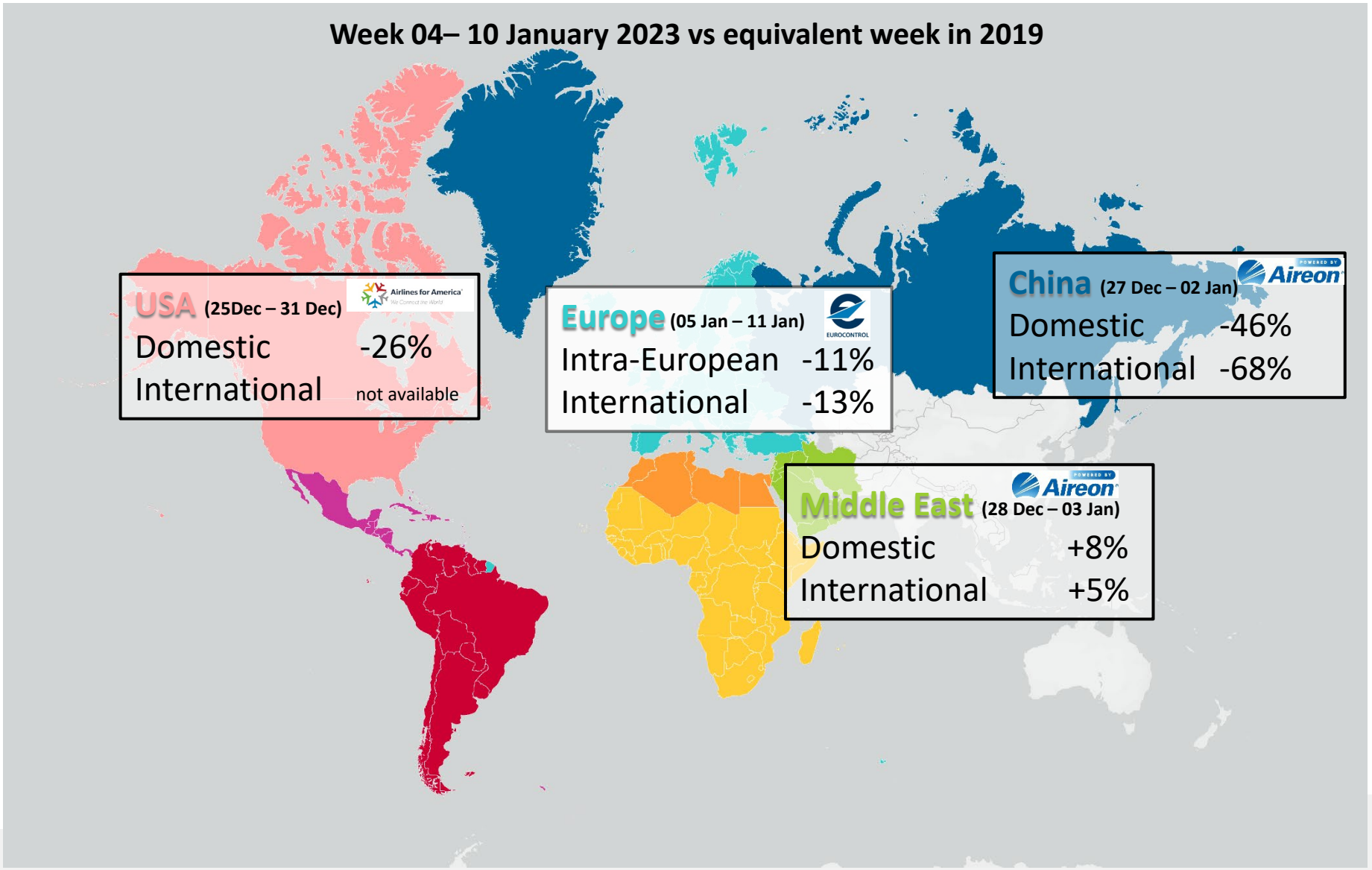
- In March 2020 with the start of COVID, traffic between Europe and Middle East dropped by more than 86%. But, since June 2022, the flow recovered to pre-COVID levels.
- Domestic traffic has constantly and regularly increased to 3,080 flights on 3 January 2023 (+11% on March 2020).
- The number of international flights was 3,132 early January 2023 (+3% on March 2020) and overflights (453 flights early January 2023) were 6% above March 2020 levels.

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



- Over the last week, **intra-European** flows accounted for **78%** of the total traffic.
- Dealing with the **Inter-Continental flows**, the busiest partner with Europe was the **Middle-East** (accounting for 6%) followed by **North-Africa** and **North Atlantic** (4% each). The respective shares remained stable compared to 2019.
- "Other Europe" (**Russian Federation**) is the 6th busiest partner accounting for 1% (in 2023) ; it was the 3rd in 2019.

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



COUNTRY PAIRS (AVERAGE DAILY FLIGHTS FOR THE LAST WEEK)

Rank evolution over prev. week	Top 10 Country-Pair on week 05 - 11 Jan 2023				
	Country-Pair	Avg daily flights	Δ vs prev. week	% vs prev. week	% vs 2019
→	Spain <-> Spain	1 012	+4	+0%	-2%
↗	France <-> France	788	+94	+14%	-14%
↘	Türkiye <-> Türkiye	741	+36	+5%	-15%
↗	United Kingdom <-> United Kingdo	705	+58	+9%	-24%
↘	Italy <-> Italy	684	-8	-1%	-6%
→	Norway <-> Norway	665	+32	+5%	-8%
→	Spain <-> United Kingdom	483	-46	-9%	-10%
↗	Germany <-> Germany	469	+128	+37%	-35%
↘	Germany <-> Spain	346	-7	-2%	-22%
→	Ireland <-> United Kingdom	281	-7	-2%	-13%

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

- **Germany-Germany** (+37%) mainly due to light AOs, Lufthansa and Eurowings .
- **France-France** (+14%) mainly due to light AOs, Air France and Chalair.
- **UK-UK** (+9%) mainly due to Loganair, British Airways and light AOs.

Decrease for

- **Spain-UK** (-9%) mainly due to Jet2.com, easyJet and Ryanair.

Seven of the top 10 flows in 2022 were domestic:

- **Spain-Spain** is the country-pair with the highest number of dep/arr flights (1,012) followed by **France-France** (788), **Türkiye-Türkiye** (741), **UK-UK** (705), **Italy-Italy** (684) and **Norway-Norway** (665).

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

Top 10

Rank evolution over prev. Week	Top 10 Airports on week 05 Jan - 11 Jan 2023				
	Airport	Average Daily Dep/Arr Flights	Δ over prev. week	% over prev. week	% vs 2019
→	IGA Istanbul Airport	1 260	→ -0	-0%	n/a
↗	London/Heathrow	1 156	↗ +28	+3%	↘ -7%
↘	Paris/Charles-De-Gaulle	1 115	↘ -38	-3%	↘ -13%
→	Amsterdam	1 026	↘ -10	-1%	↘ -17%
↗	Frankfurt	1 006	↗ +108	+12%	↘ -19%
↘	Madrid/Barajas	997	↗ +21	+2%	↘ -8%
→	Barcelona	694	↘ -36	-5%	↘ -12%
→	Munich	686	↗ +27	+4%	↘ -29%
↗	Lisbon	574	↘ -14	-2%	↗ +2%
→	Rome/Fiumicino	569	↘ -23	-4%	↘ -26%

- **iGA Istanbul** is the airport with the highest number of dep/arr flights (1,260), followed by **London Heathrow** (1,156), **Paris CDG** (1,115), **Amsterdam** (1,026) and **Frankfurt** (1,006).
- **Lisbon** is the only airport in the top 10 which recorded traffic levels above 2019 (+2%).

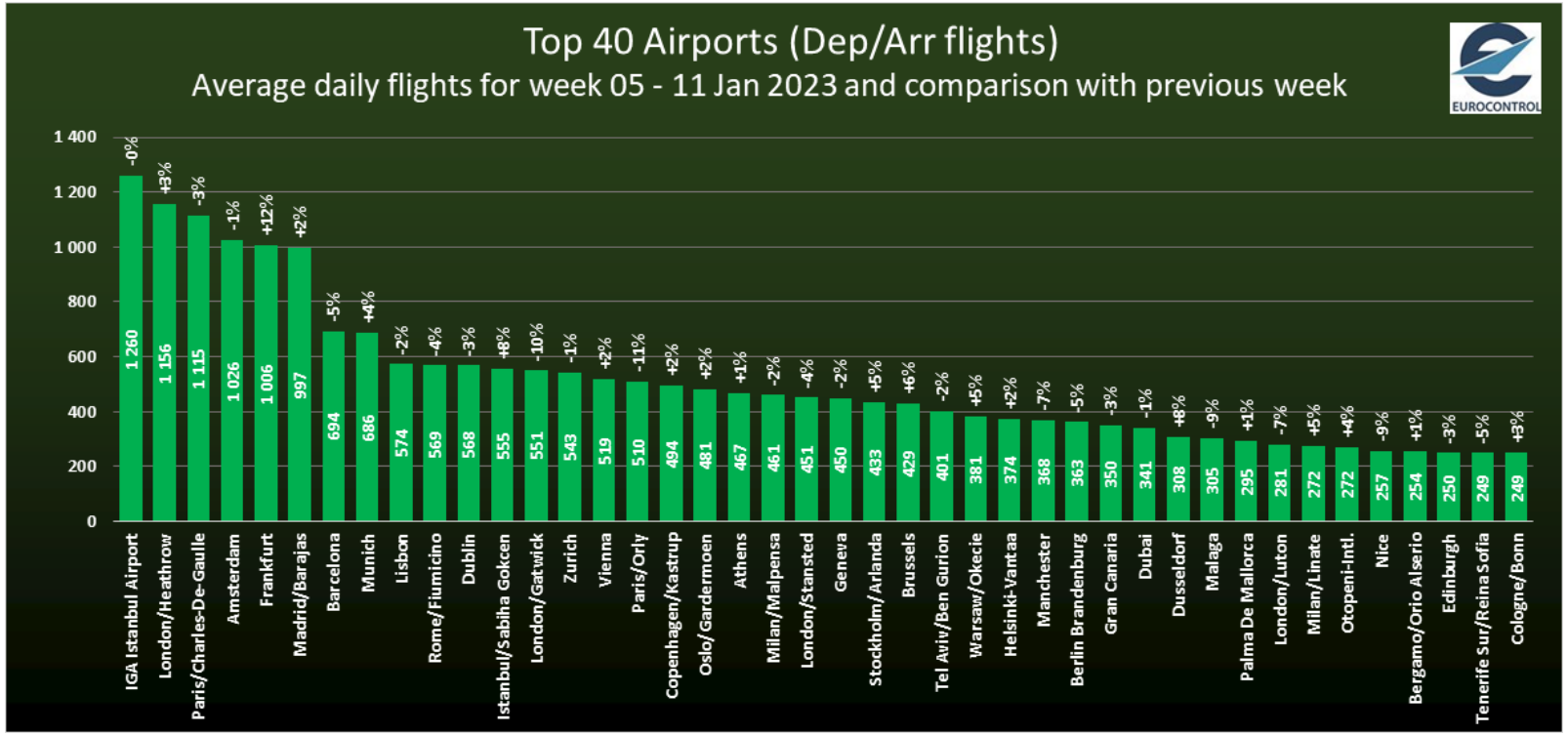
Within the top 10, **four** airports posted **increases** over the previous week:

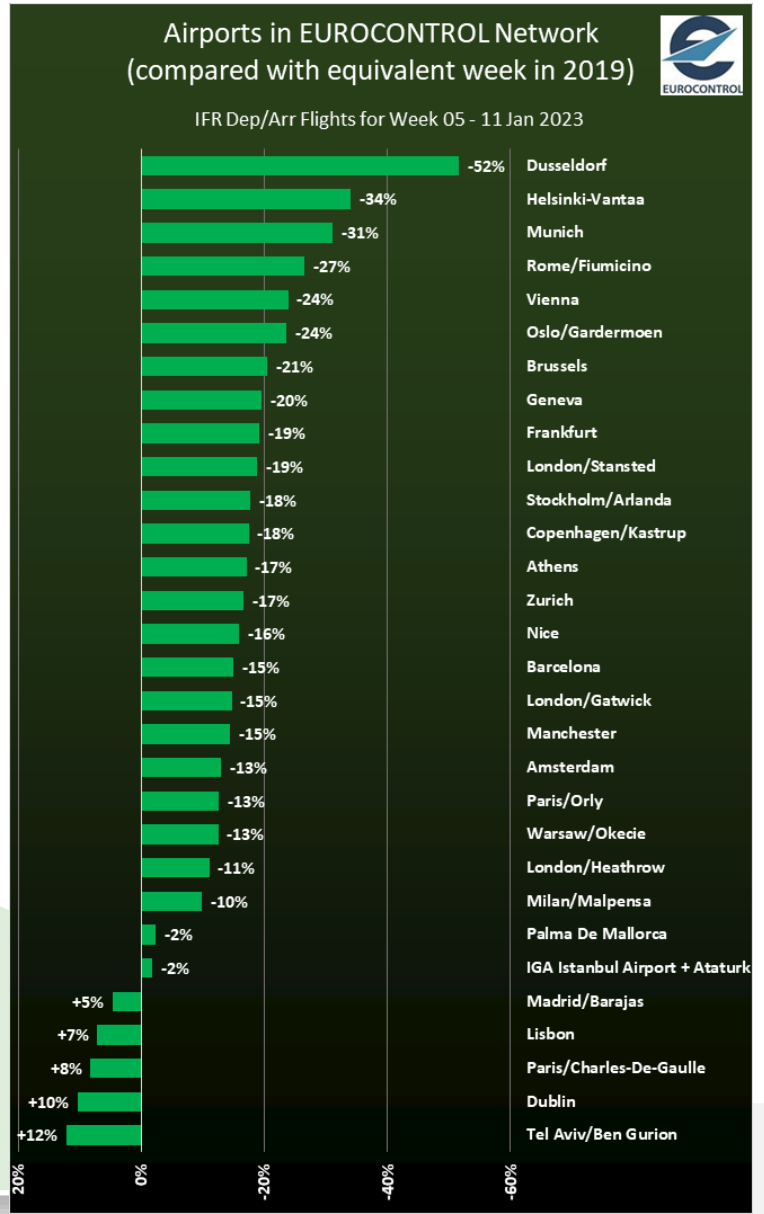
- **Frankfurt** (+12%) mainly due to Lufthansa. On domestic flows a well as flows with Poland, Italy and France.
- **London Heathrow** (+3%) mainly due British Airways, SAS and Air France. On flows with the US, domestic flows and flows with France.
- **Munich** (+7%) mainly due to Lufthansa. On domestic flows and flows with Türkyie, Hungary, France and Denmark.

Decrease for:

- **Paris CDG** (-5%) mainly due to easyJet and Nouvel Air Tunisie. On flows with Italy, Spain and Morocco.

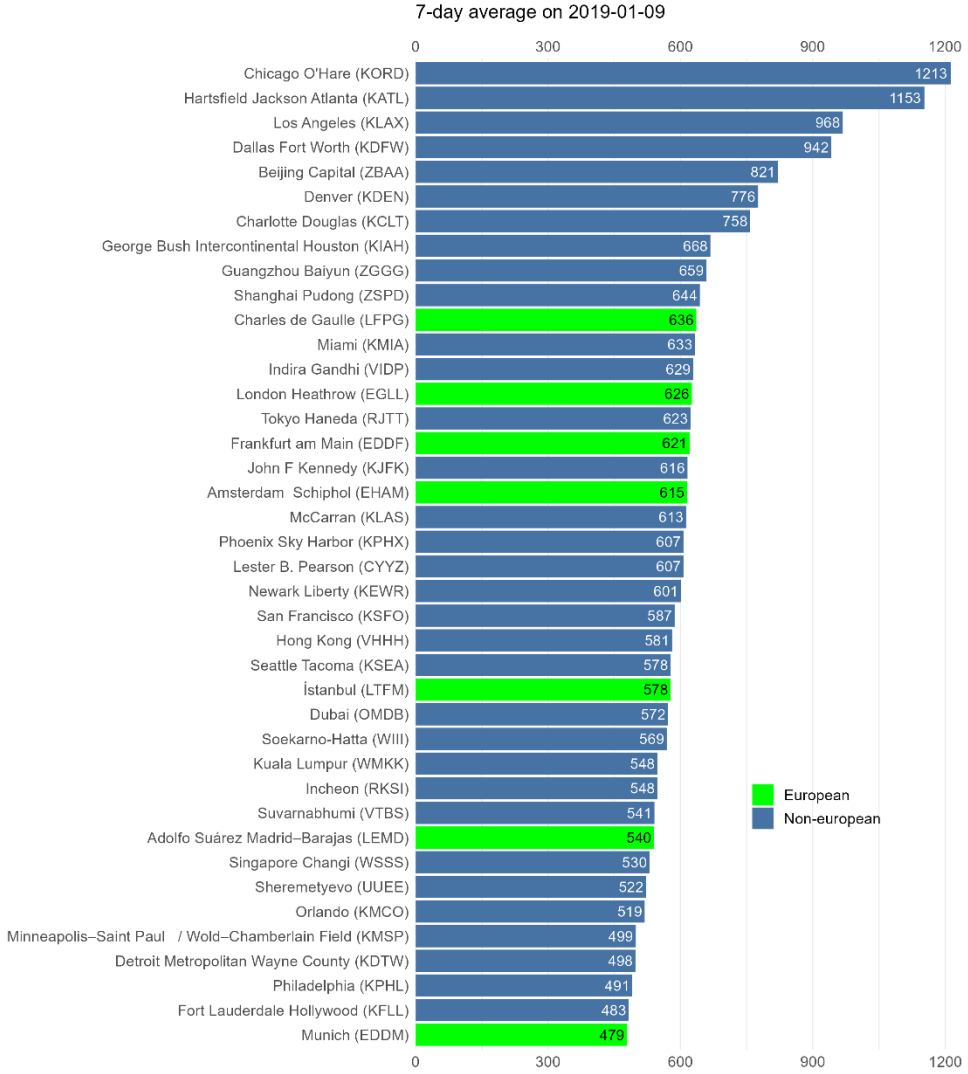
AIRPORTS (AVERAGE DAILY DEPARTURE/ARRIVAL FLIGHTS FOR THE LAST WEEK)
Top 40

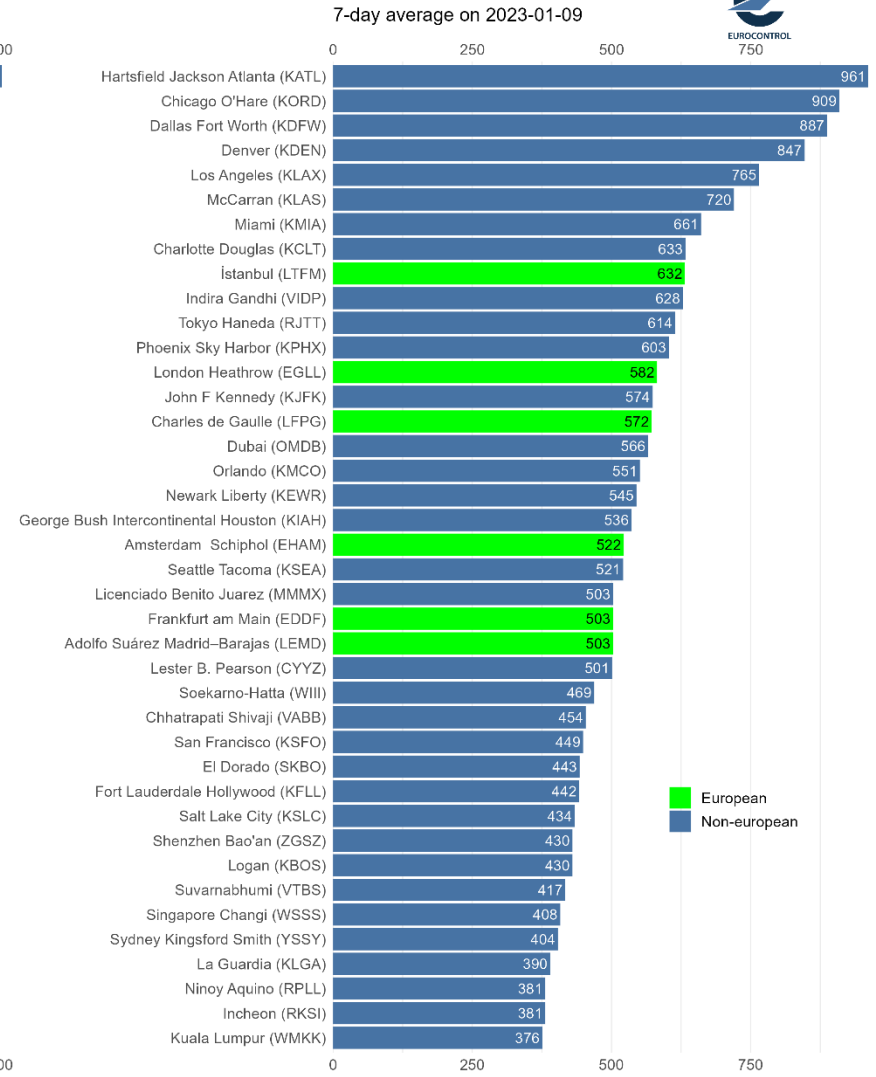




- Highest increases in flights vs the previous week for **Frankfurt** (+12%), **Istanbul Sabiha Gokcen** (+8%), **London Heathrow** (+3%), **Munich** (+4%) and **Düsseldorf** (+8%).
- Largest decreases (flights) for **London Gatwick** (-10%) and **Paris Orly** and **CDG** (-13% each).
- Traffic levels ranging from -52% (Düsseldorf) to +12% (Tel Aviv) compared to 2019.

TOP 40 GLOBAL AIRPORTS (AVERAGE DAILY DEPARTURE FLIGHTS)



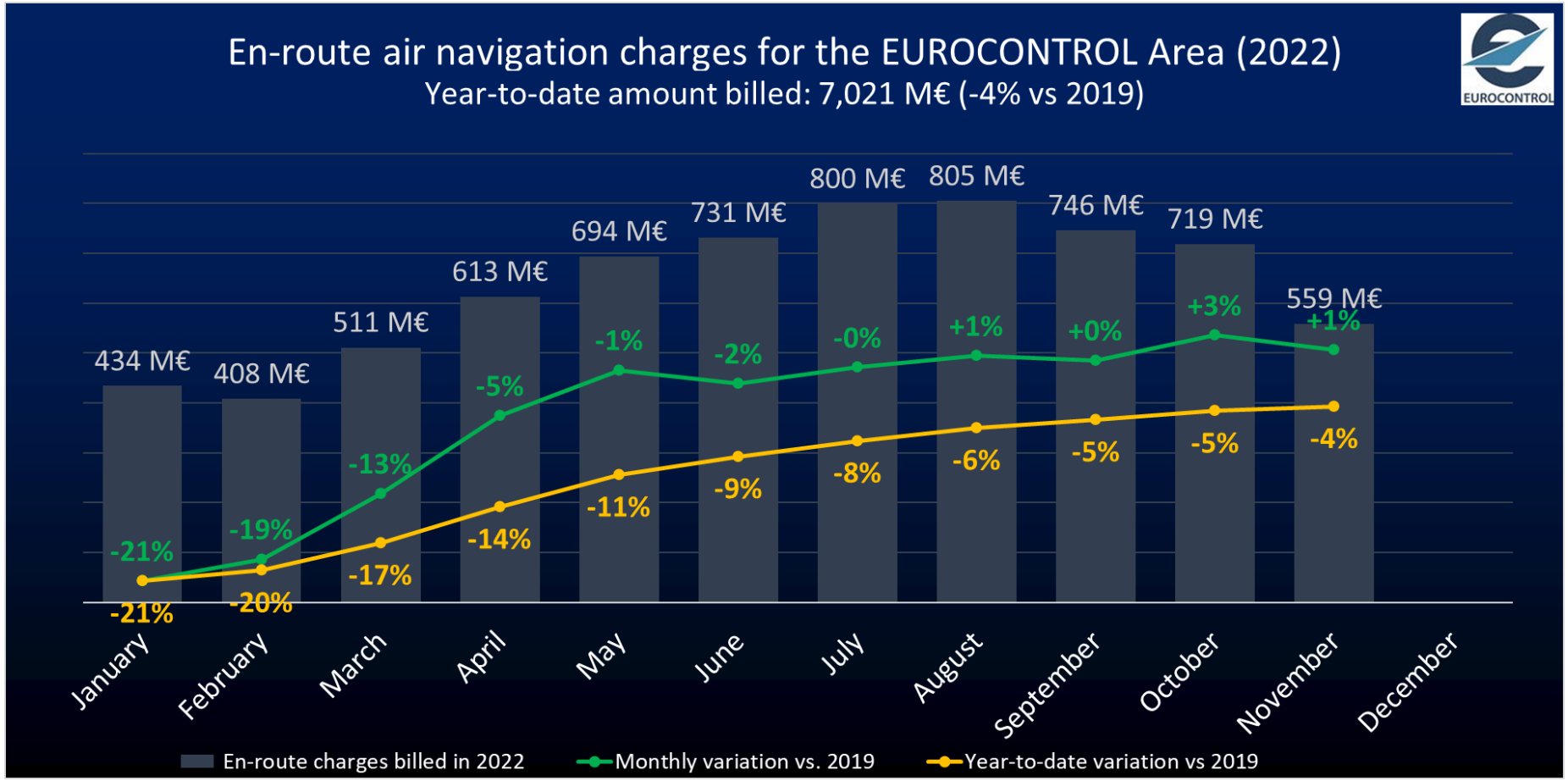


Source: Flightradar24 Historical Global Utilisation data

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

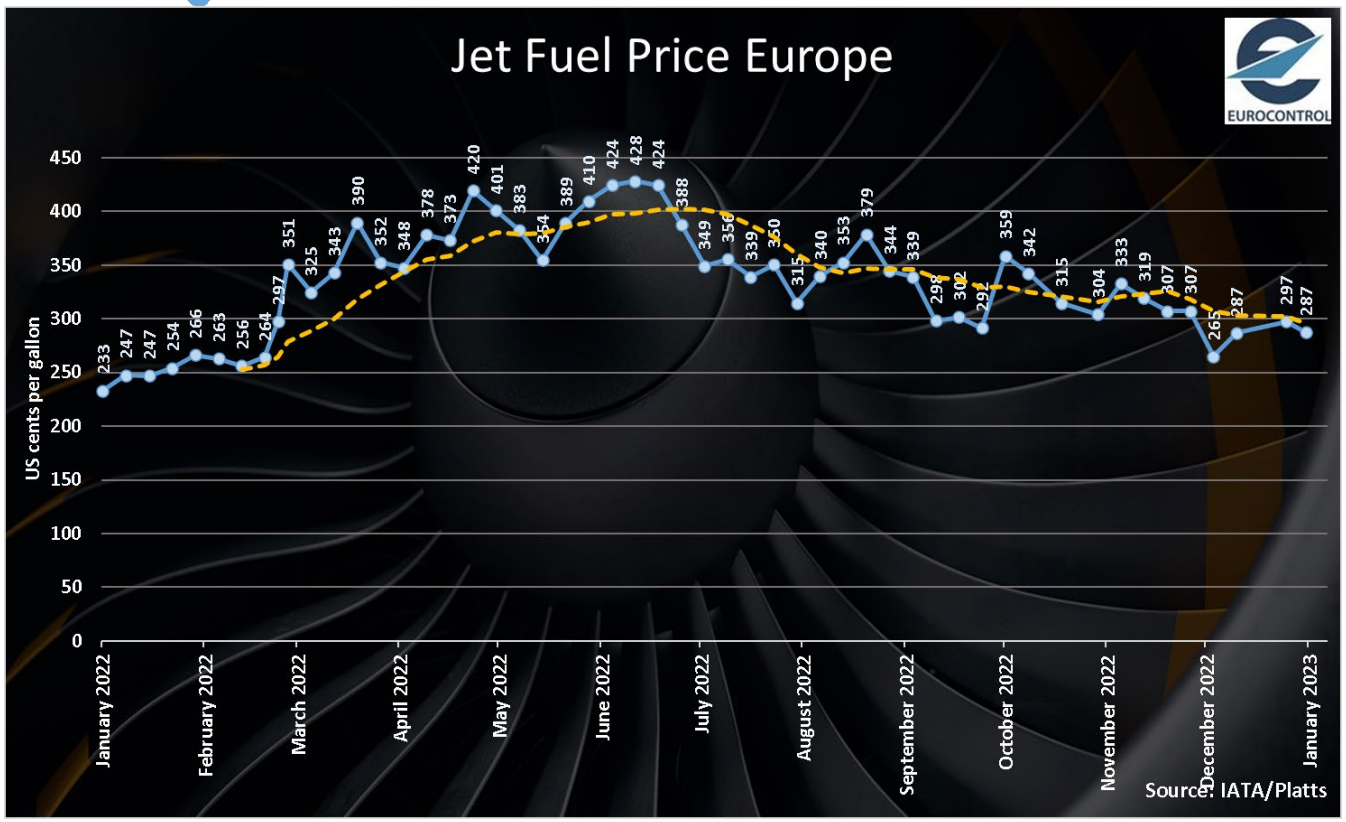
- **6 European airports** are ranked in the **Top 40** global airports (vs 7 in 2019)
- The **first European airport** (rank 9) is **iGA Istanbul***.
- Two other airports in the **Top 15: London Heathrow** and **Paris Charles de Gaulle**.
- 10 of the Top 15 global airports are currently **located in the US.**
- The first **Asian airport currently** is **New Delhi** (10th).

EN-ROUTE AIR NAVIGATION CHARGES



- **EUROCONTROL** has billed **7,021 M€** on a year-to-date basis (Jan-Nov 2022).
- This is **4% below** the amount billed for the same period in 2019.

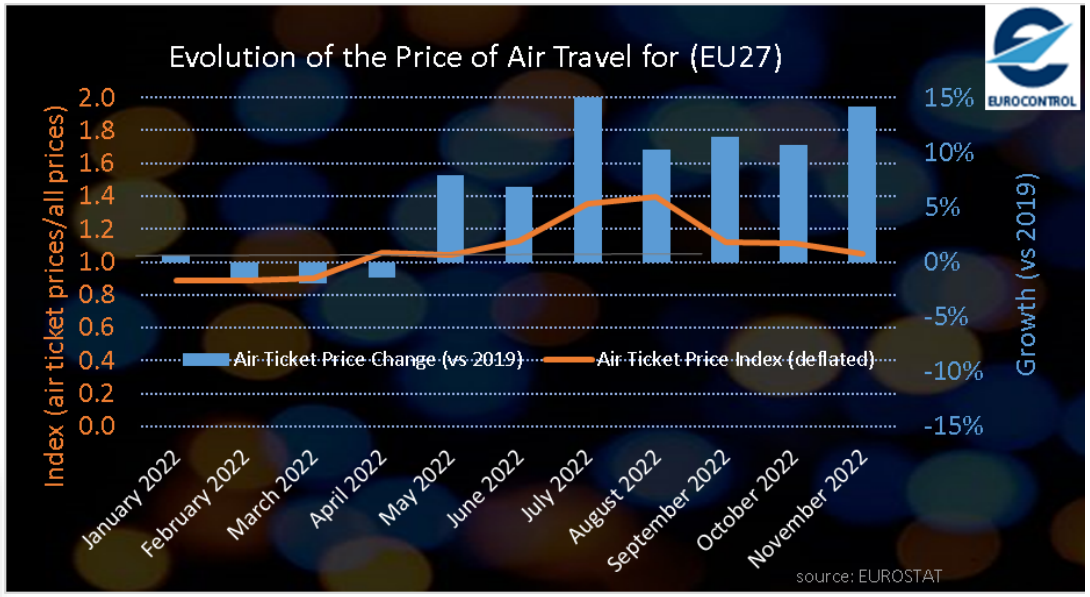
FUEL & TICKET PRICES



- **Jet fuel prices** averaged at 289 cts/gallon in December 2022 and remained stable at 287 cts/gallon in January 2023.
- Overall, average fuel prices increased by 88% in 2022, compared to 2021 (they averaged at 180 cents/gallon over the same period in 2021).

- In November 2022, **air ticket prices** in Europe (EU27) recorded a 14% increase on November 2019.
- Over the January to November 2022 period, air ticket prices have increased by 6% compared to 2019.

Air ticket prices here are deflated (we removed the effects of inflation).



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