

13 October 2022



EUROCONTROL

Comprehensive Assessment

EUROPEAN AVIATION



SUPPORTING EUROPEAN AVIATION



NETWORK
MANAGER



Headlines (Week of 6 — 12 October 2022)

- **28,263 daily flights** on average over past week (-2% on previous week); 88% of 2019 levels.
- Network traffic (flights) is slightly below the **base EUROCONTROL Traffic Scenario**: 87% for 1-12 October (vs 2019). On a **year-to-date basis**, 2022 reached 82.4% of 2019 levels.
- Traffic is now generally decreasing affecting particularly Summer destinations : **Spain-Spain** (-4%), **Italy-Italy** (-3%), **Germany-Spain** (-4%), **Germany-UK** (-10%), **Germany-Türkiye** (-6%) and **France-Italy** (-4%).
- **Ryanair** was the busiest Aircraft Operator with 2,918 flights per day on average (+15% vs2019) over last week, followed by **easyJet** (1,622; -11%), **Turkish Airlines** (1,279; -6%), **Lufthansa** (1,199; -24%), **Air France** (1,012; -17%), **KLM** (782; -16%) and **Wizz Air** (761; +15%).
- Intra-European traffic is **-10% below** 2019 levels. Flows with US (-16%), China (-51%) and Middle-East (+5%).
- **8** of the top 10 airports are decreasing, notably **IGA Istanbul, Antalya, Munich and Palma**. **Two** European airports (**IGA Istanbul and Amsterdam**) are in the Top 10 Global airports.
- **Arrival punctuality** (within 15 minutes) is **71%** while **departure punctuality** is **66%**, both below 2019 levels.
- In recent days, **ATFM delays** were **below 2019**, except on **29 September** with a **French ATC industrial action**.
- **Jet fuel prices surged to 359 cts/gallon** on 7 October (+19% over two weeks, +54% since early January).

Traffic Situation

Average daily flights (including overflights)

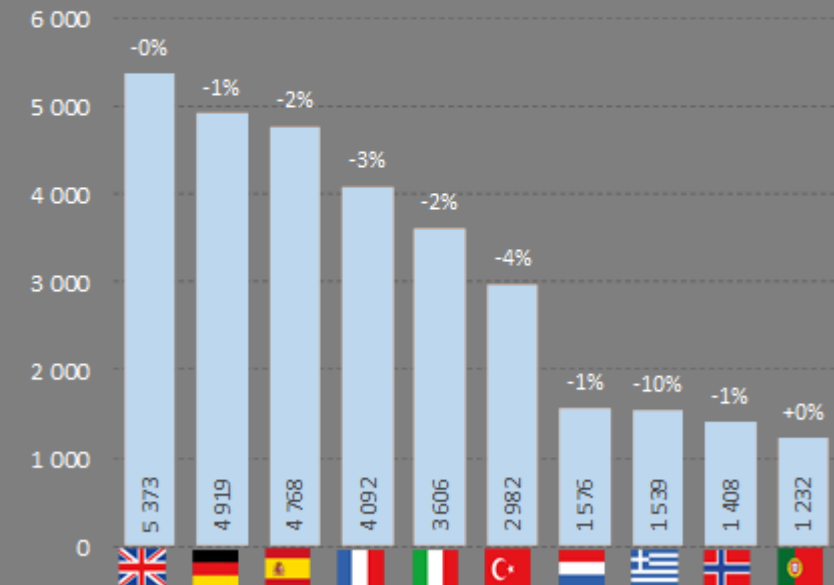
On week 06 - 12 Oct 2022

88%

of equivalent week in 2019

Top 10 Busiest States

on week 06 - 12 Oct 2022 (avg daily flights)
(Dep/Arr flights and comparison with previous week)



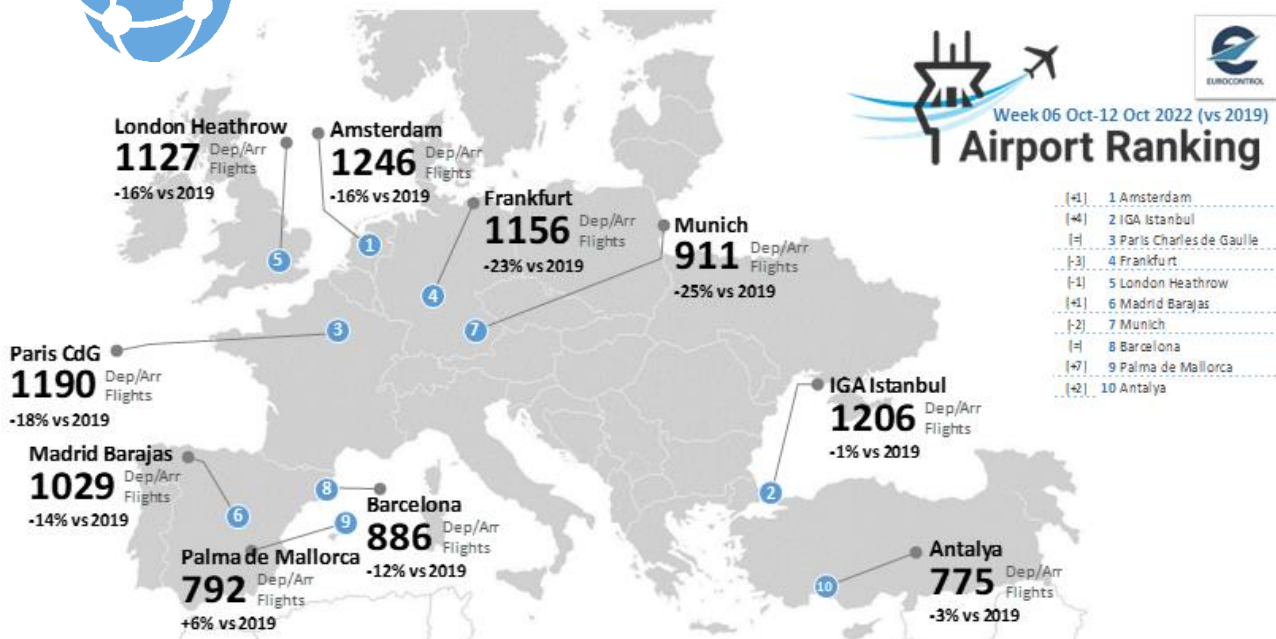
Top 10 Aircraft Operators

on Week 06 - 12 Oct 2022 (avg daily flights)



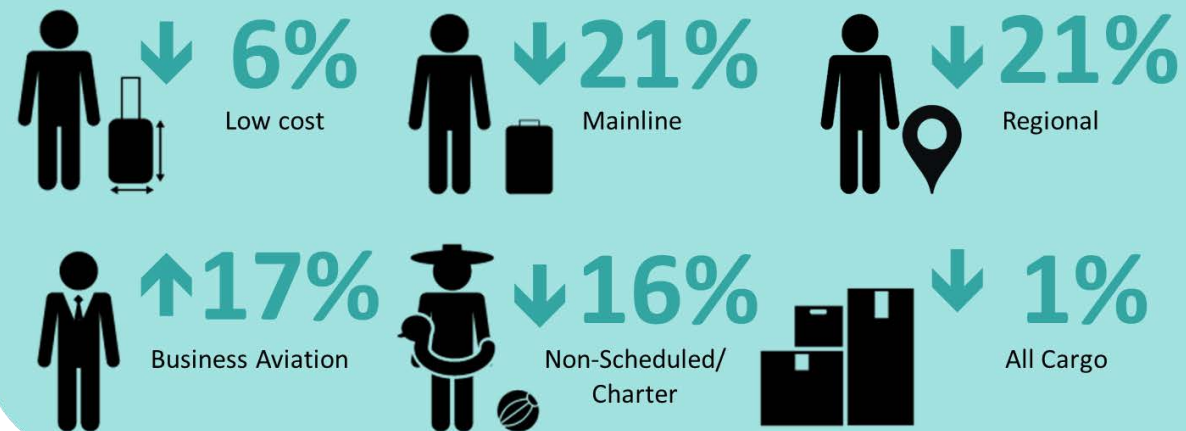


TOP 10 AIRPORTS, FLOWS AND MARKET SEGMENTS



Market Segments

on week 06 – 12 Oct 2022 (vs 2019)



Traffic Flow

Average daily flights on week of 06 - 12 Oct 2022

	Flights	vs previous week	vs 2019
Intra-European	22 552	-2%	-10%
Intercontinental	5 031	-1%	-21%

Economics

(7 October 2022)

Fuel price

↑359
cents/gallon

compared to
302 cents/gallon on 23 September 2022

Source: IATA/Platts

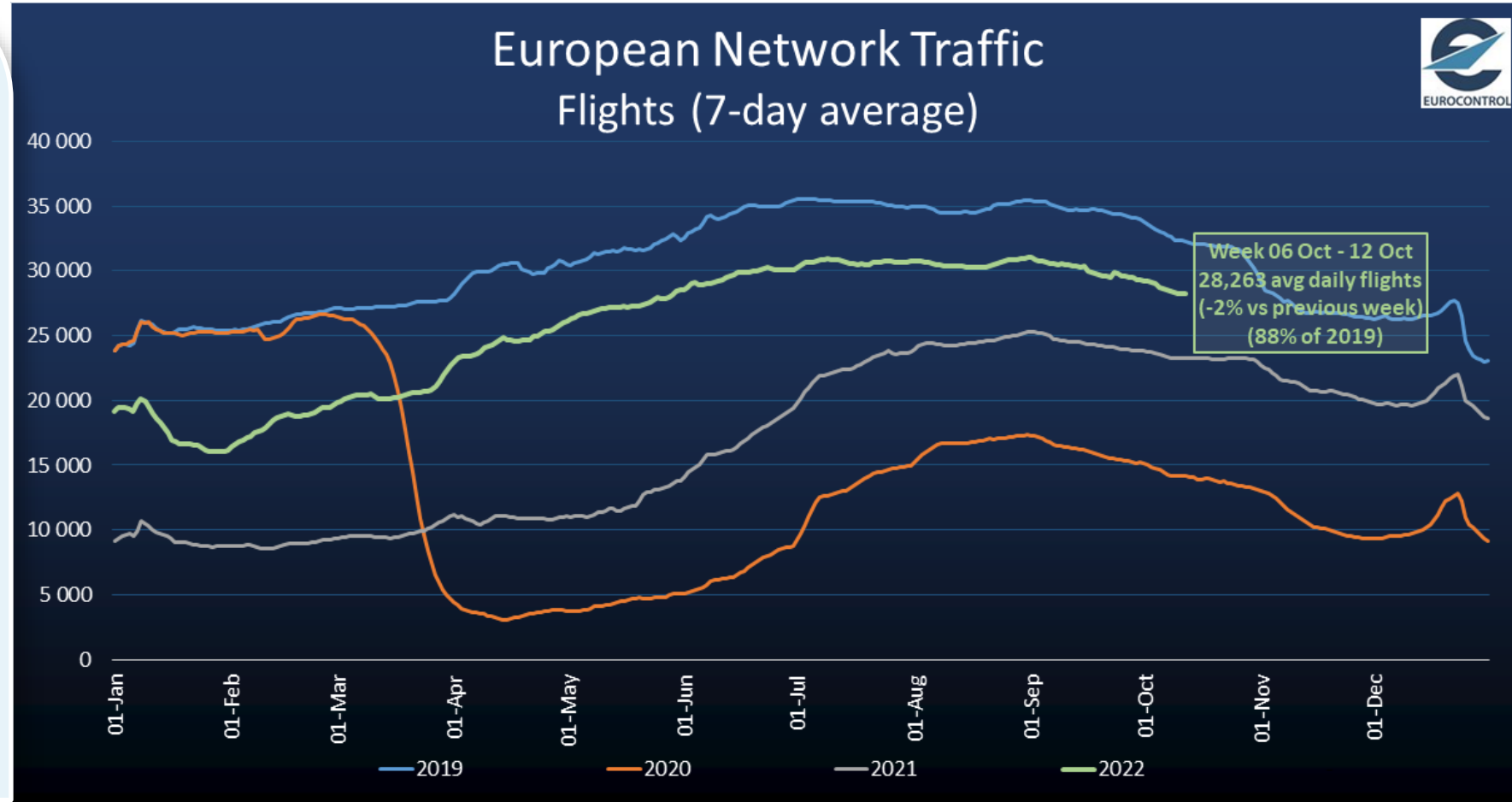


OVERALL TRAFFIC SITUATION AT NETWORK LEVEL



On week 6 Oct – 12 Oct:

- ✘ **28,263** average daily flights.
- ✘ **-2%** on previous week.
- ✘ **88%** of 2019 traffic levels.
- ✘ Since mid-September, traffic volumes (flights) are slowly decreasing below 30,000 average daily flights, while staying at 88% vs. 2019.

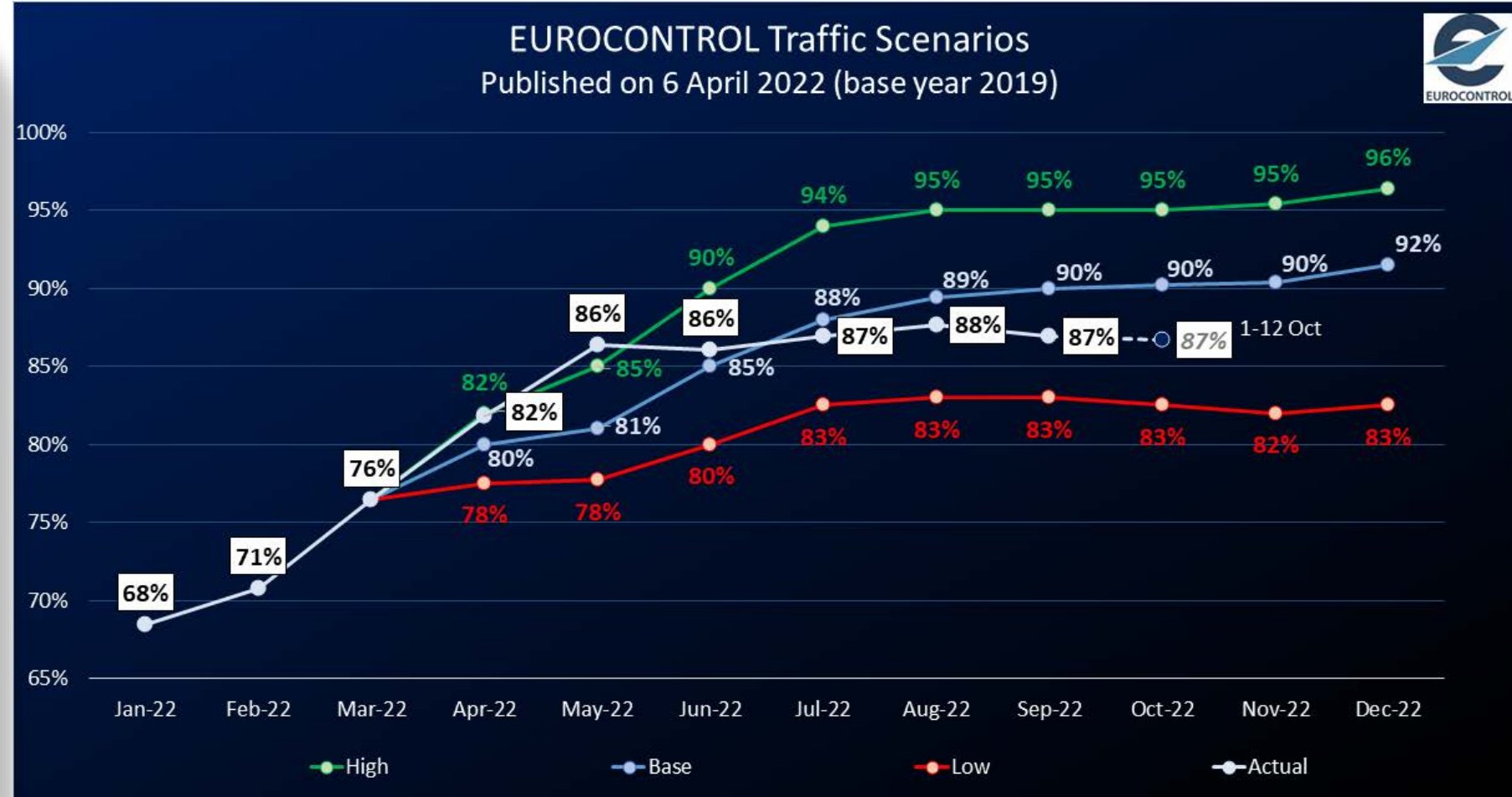




CURRENT SITUATION COMPARED TO THE LATEST EUROCONTROL TRAFFIC SCENARIOS

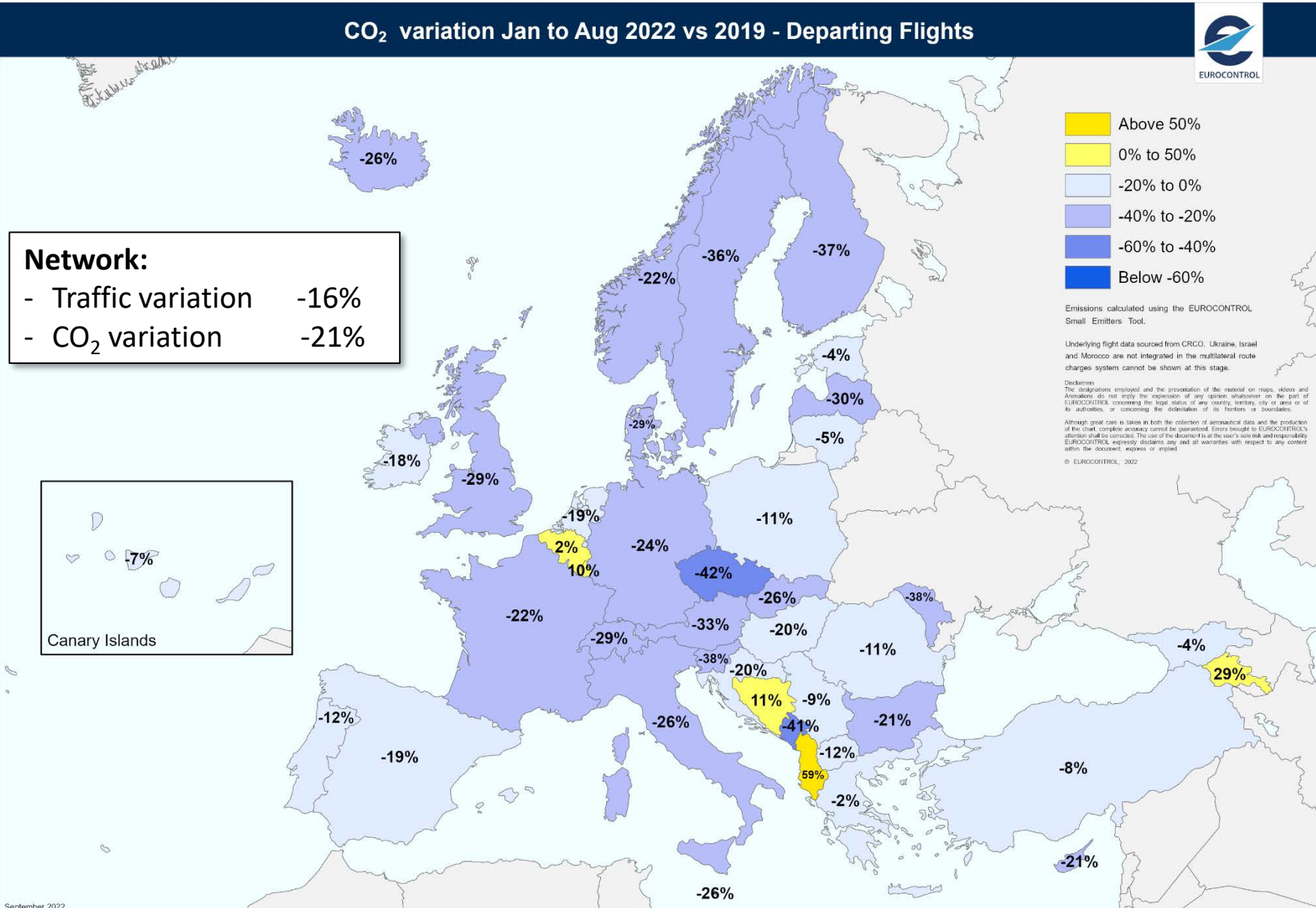


- ✘ The last EUROCONTROL Traffic scenarios have been published on 6 April 2022.
- ✘ Since the beginning of **October**, network traffic (flights) is at **87% of 2019** levels, below the base scenario.
- ✘ On a year to date basis, network traffic in 2022 stands at **82.4%** of 2019.





AVIATION SUSTAINABILITY

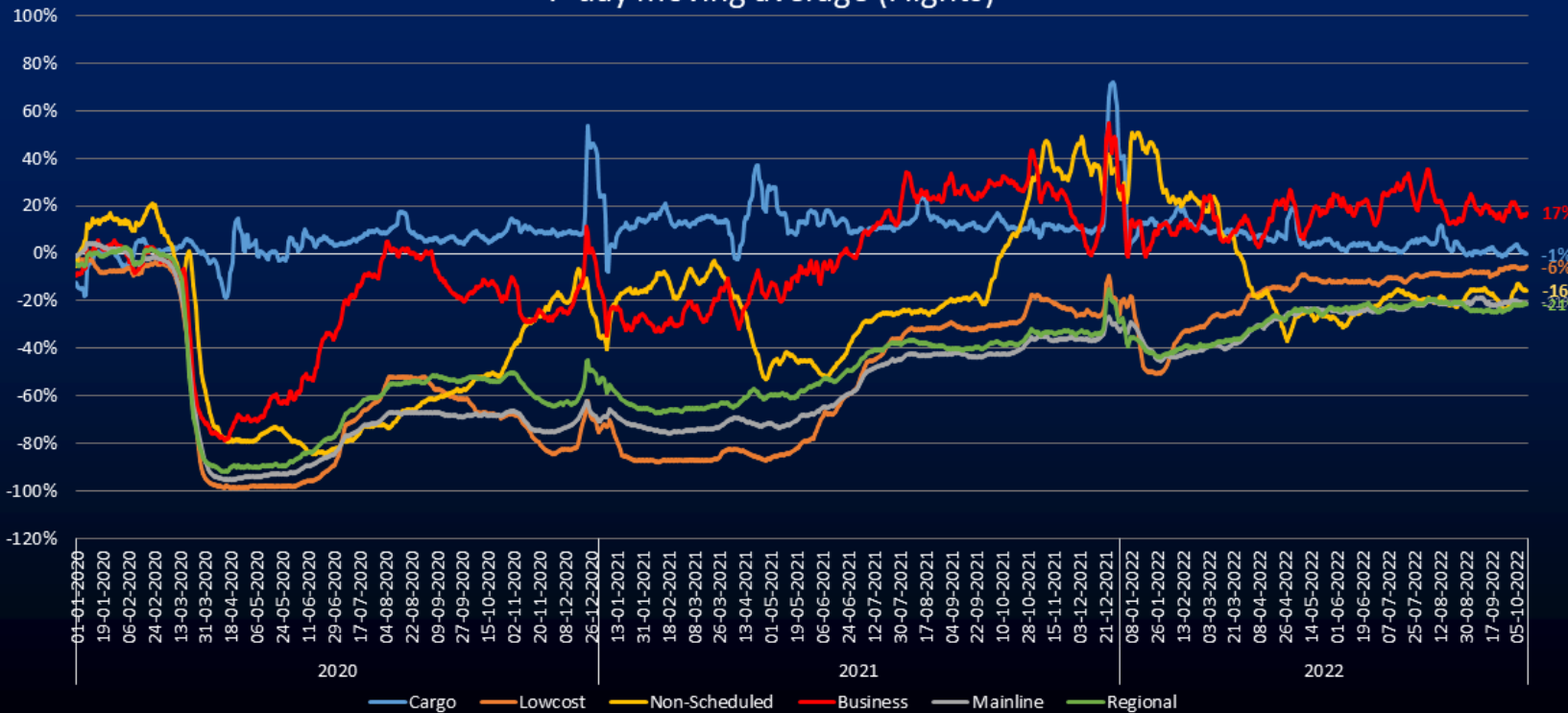




MARKET SEGMENTS



Market segments in EUROCONTROL Network
(compared with equivalent days in 2019)
7-day moving average (Flights)



Until 12 October 2022, compared to 2019:

- ✘ One segment is above 2019 levels: **Business Aviation** (+17%) while **All-cargo** is just below (-1%).
- ✘ **Low-Cost** (-6% vs 2019) recorded a continuous recovery at the beginning of 2022, plateaued at -8% during the summer months and continue to recover (-6%) in September.
- ✘ **Mainline** (-21%) and **Regional** (-21%) 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 Aircraft Operators	Week (06 - 12 Oct 2022)		
	Average flights per day	% vs 2019	% over previous week
RYANAIR	2 918	+15%	+0%
easyJet	1 622	-11%	+2%
TURKISH AIRLINES	1 279	-6%	-6%
Lufthansa	1 199	-24%	+2%
AIRFRANCE	1 012	-17%	-2%
KLM Royal Dutch Airlines	782	-16%	-1%
Wizz	761	+15%	-0%
BRITISH AIRWAYS	721	-23%	+2%
vueling	653	+4%	+2%
Scandinavian Airlines	627	-32%	-3%

✘ **Ryanair** is the busiest Aircraft Operator with 2,918 flights per day on average (+15% vs2019) over last week, followed by **easyJet** (1,622; -11%), **Turkish Airlines** (1,279; -6%), **Lufthansa** (1,199; -24%), **Air France** (1,012; -17%), **KLM** (782; -16%) and **Wizz Air** (761; +15%).

✘ Vueling Moved up to the 9th rank compared to two weeks ago.

Within the top 10, **five airlines** posted **decreases** over the previous week:

- ✘ **Turkish Airlines** (-80 flights; -6%) mainly due to flows with Germany, followed by domestic flows and flows with US, Saudi Arabia and Iraq.
- ✘ **Air France** (-19 flights; -2%) mainly due to Domestic flows and flows with Germany, Greece and Italy.
- ✘ **SAS** (-16 flights; -3%) mainly due to domestic flows in Norway as well as flows between Sweden and Greece and Norway.

Also **increases** for:

- ✘ **easyJet** (+32 flights; +2%) mainly due to domestic flows in France, followed by France-UK, Italy-Italy, UK-UK and Switzerland-UK.
- ✘ **Lufthansa** (+23 flights; +2%) mainly due to domestic flows in Germany, followed by flows with France, Poland, US, UK and Israel.



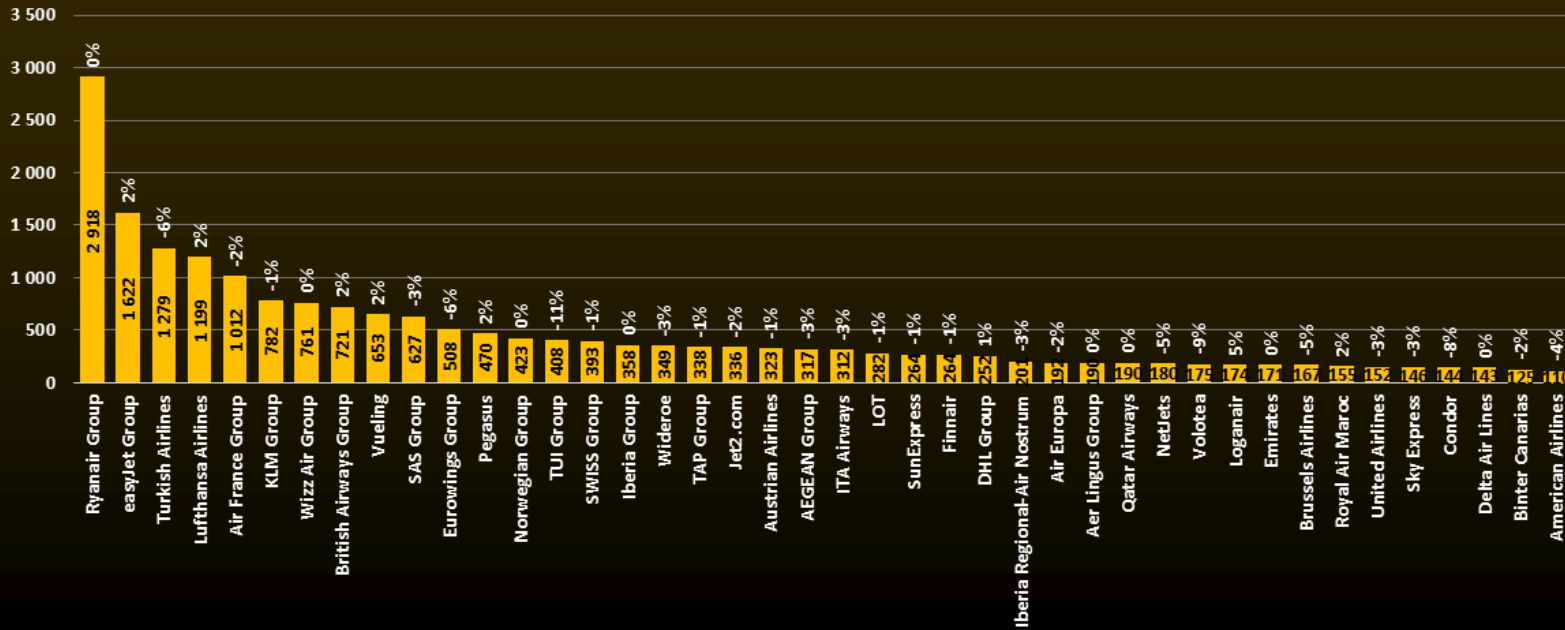
AIRCRAFT OPERATORS (AVERAGE DAILY FLIGHTS FOR THE LAST WEEK)

Top 40



Aircraft operators

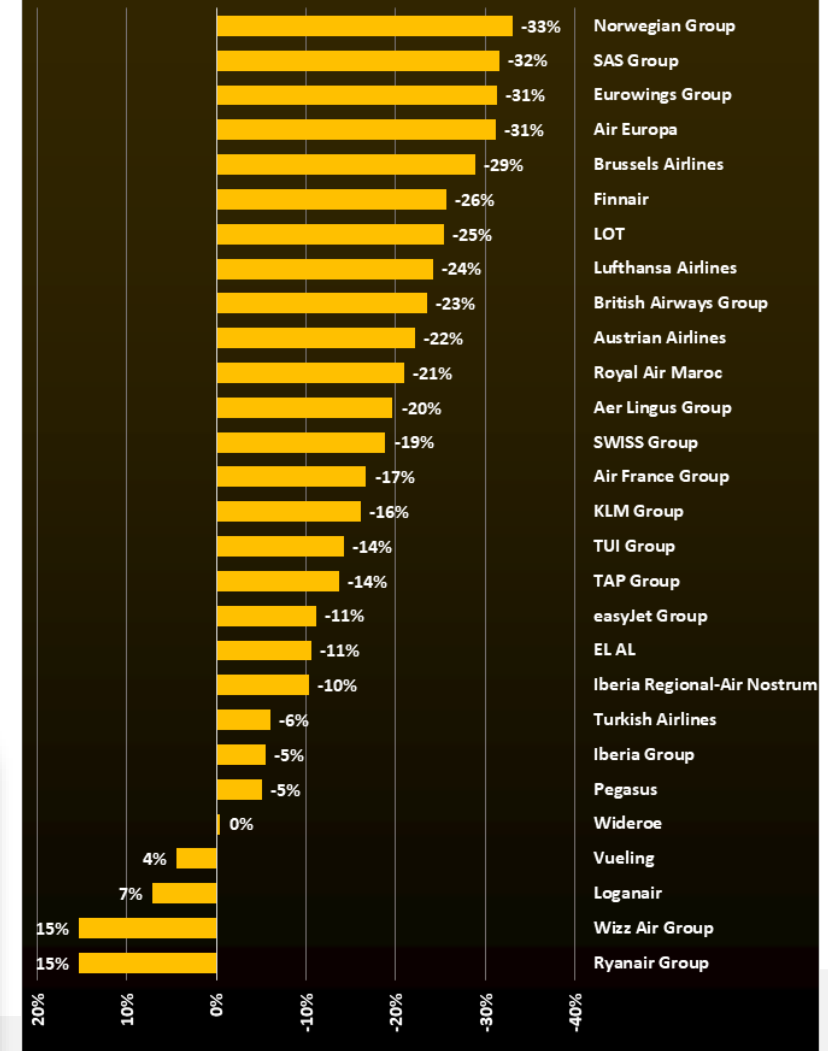
Average daily flights for week 06 - 12 Oct 2022 and comparison with previous week



- ✦ Largest decreases in flights vs previous week for **Turkish Airlines (-6%), TUI (-11%), Eurowings (-6%), Air France (-2%), Volotea (-9%), SAS (-3%)** and **Condor (-8%)**.
- ✦ Highest increases for **easyJet (+2%), Lufthansa (+2%), Vueling (+2%)** and **British Airways (+2%)**.
- ✦ Traffic levels ranging from **-33% (Norwegian)** to **+15% (Ryanair)** vs 2019.

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

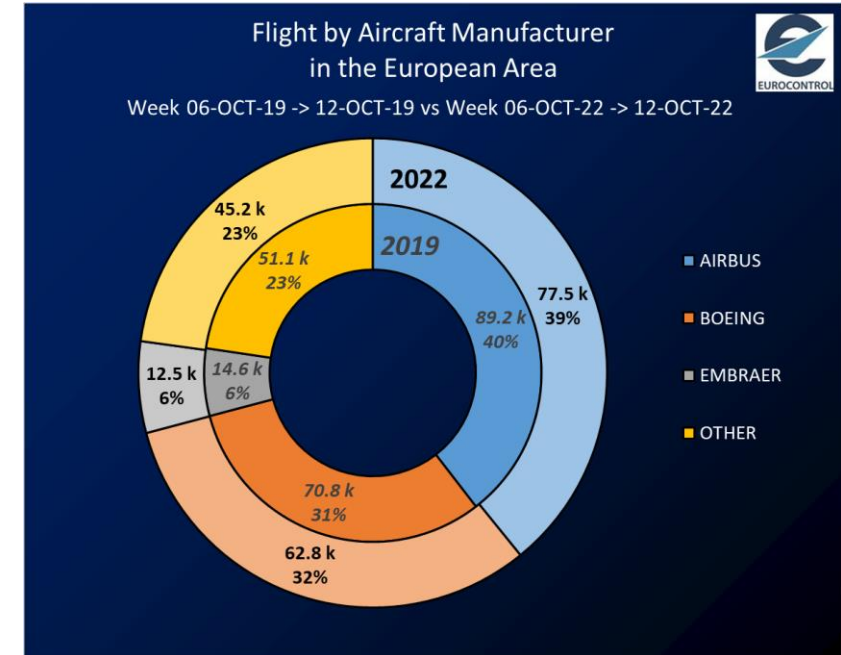
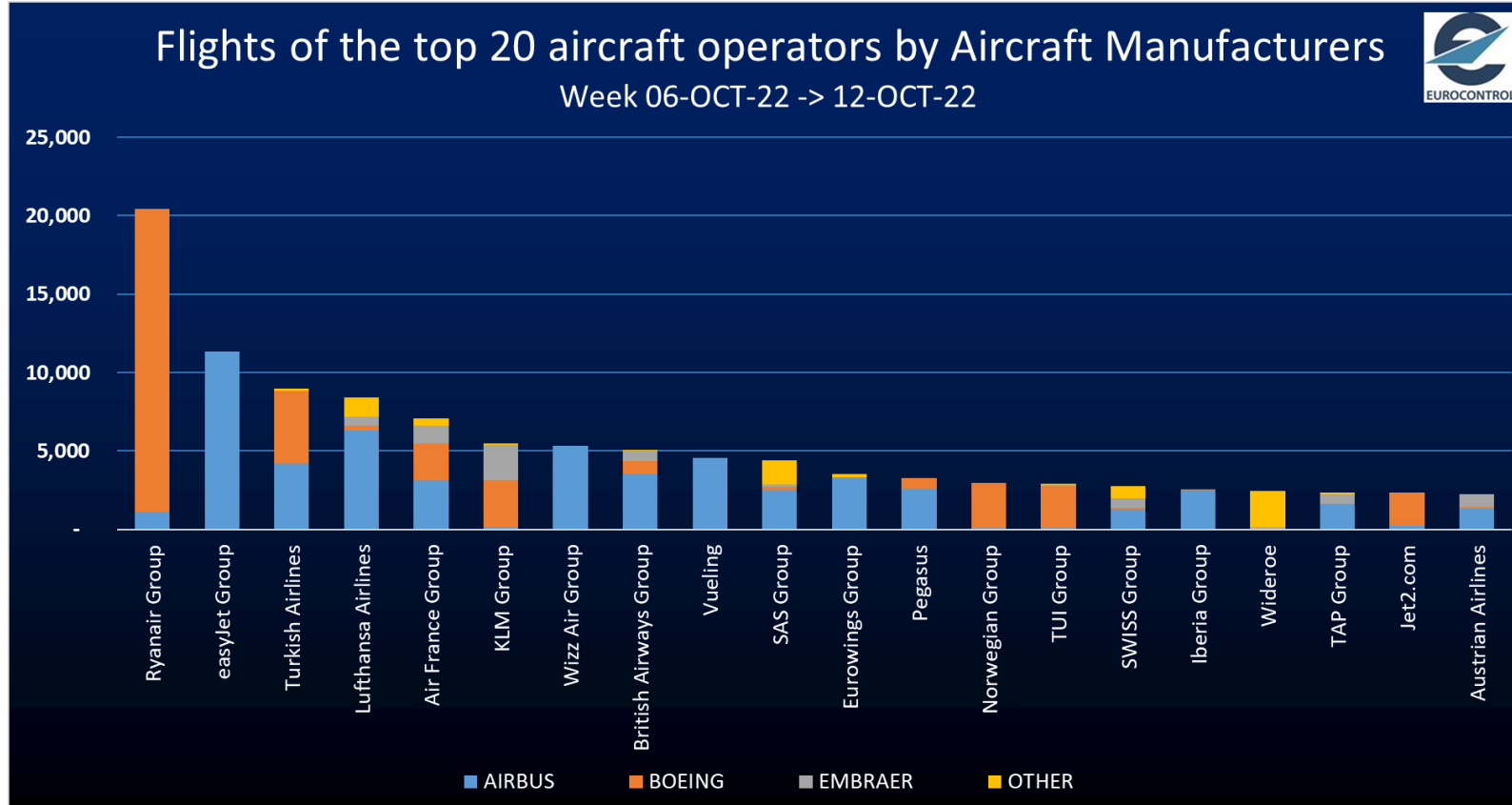
IFR Flights for Week 06 - 12 Oct 2022





AIRCRAFT MANUFACTURERS (SHARE OF FLIGHTS FOR THE LAST WEEK)

Flights of the top 20 Aircraft operators



✘ At European level, **39%** of all flights last week were operated by **Airbus** aircraft vs **32%** by **Boeing** aircraft.

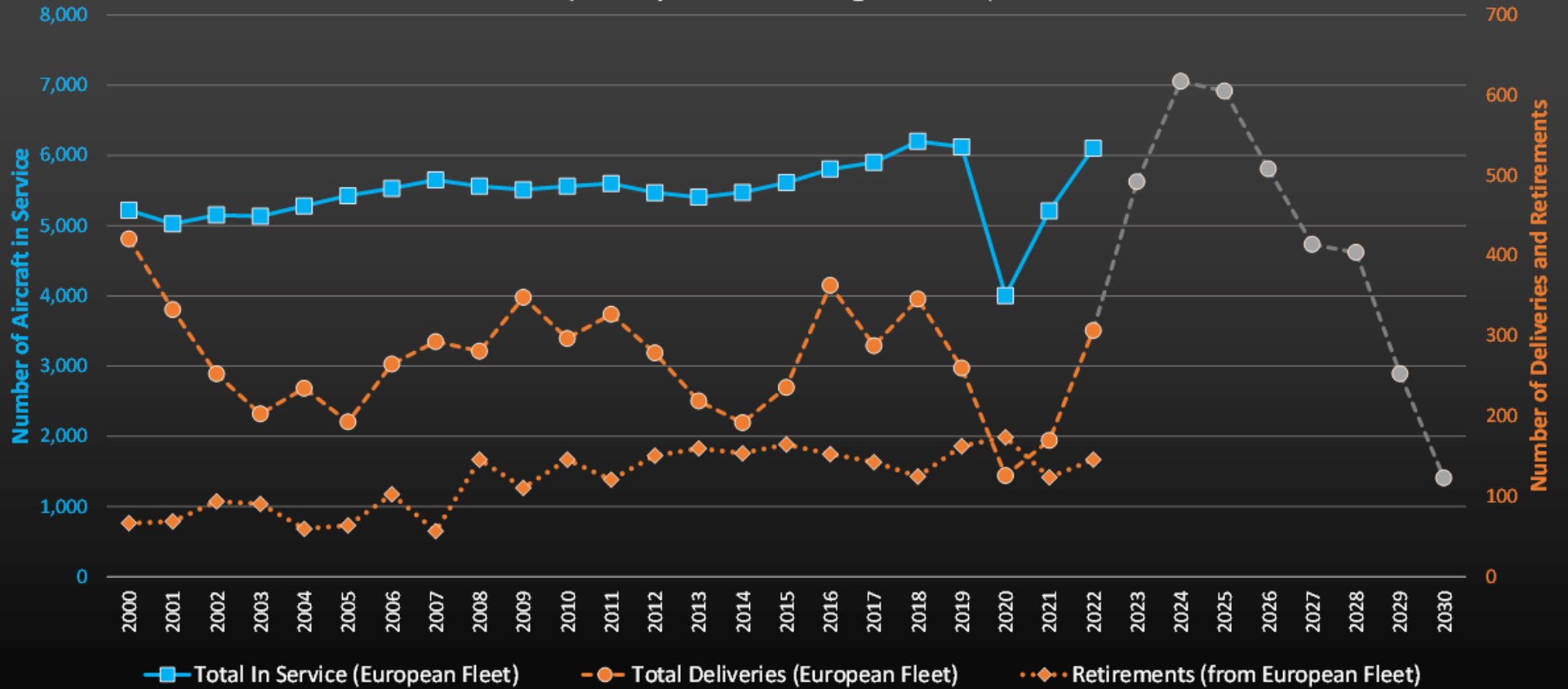
✘ The situation varies for the top 20 aircraft operators. For these aircraft operators, Airbus share was 51% and Boeing share was 36%.



ORDERS AND DELIVERIES IN EUROPE



Commercial Aircraft In Service, Retirements and Deliveries (Europe excluding Russia)



- ✘ The European fleet has stabilised since the disruption due to COVID-19 outbreak and is now back up to 2018/2019 levels.
- ✘ In 2022, there have been 168 deliveries, with a further +/-140 expected.

Source: Cirium



AIRCRAFT OPERATORS (AVERAGE DAILY FLIGHTS FOR THE LAST WEEK)

Cargo, Legacy, Low Cost and Regional Carriers



PERFORMANCE OF MAJOR CARGO CARRIERS

for the week 6 - 12 October 2022



PERFORMANCE OF MAJOR LOW-COST CARRIERS

for the week 6 - 12 October 2022



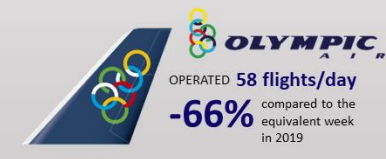
PERFORMANCE OF MAJOR LONG-HAUL/LEGACY CARRIERS

for the week 6 - 12 October 2022



PERFORMANCE OF MAJOR REGIONAL CARRIERS*

for the week 6 - 12 October 2022



*REGIONAL AIRLINES USING SEPARATE IATA CODES

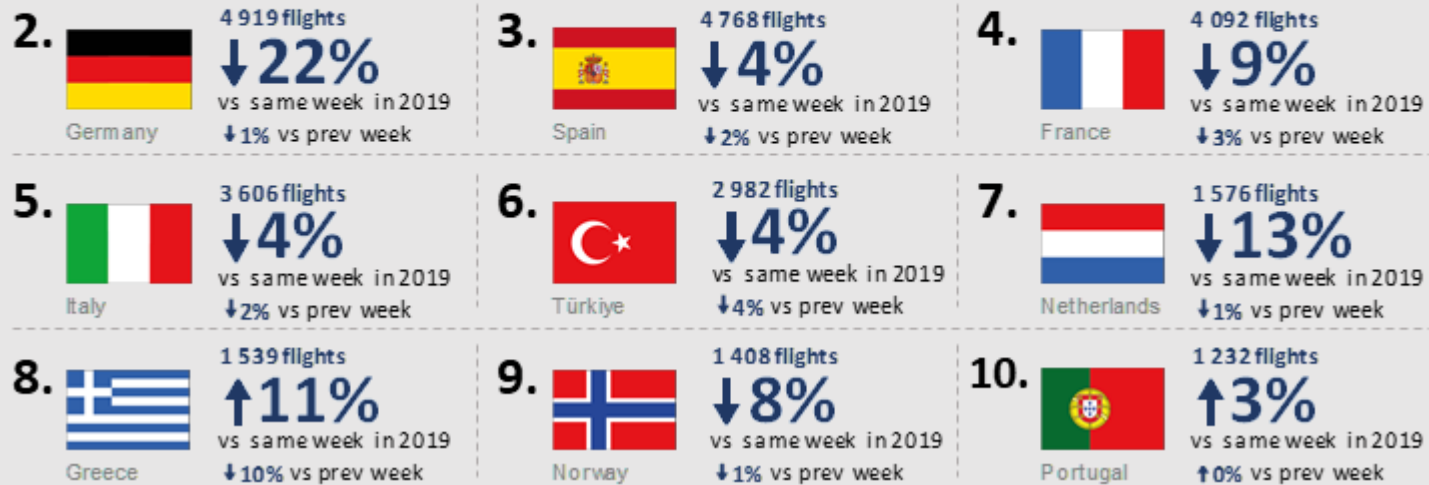


STATES (AVERAGE DAILY DEPARTURE/ARRIVAL FLIGHTS FOR THE LAST WEEK)



Top 10 States

on week 06 - 12 Oct 2022 (avg daily dep/arr)



✘ **UK** is the State with the highest number of dep/arr flights on average over last week (5,373) followed by **Germany** (4,919), **Spain** (4,768), **France** (4,092), **Italy** (3,606) and **Türkiye** (2,982).

✘ In this top 10, **Greece** and **Portugal** are the only States having exceeded their 2019 traffic volumes (by 11% and 3% respectively).

✘ Greece (-10% on previous week) has dropped to 8th rank.

Within the top 10, **nine** States posted flight decreases over the previous week:

- ✘ **Greece** (-163 flights; -10%) mainly due to Smartwings, TUI, Aegean and Ryanair. Flows with UK, Poland, Italy and Czech Rep.
- ✘ **Türkiye** (-133 flights; -4%) mainly due to Turkish Airlines, light AOs and Smartwings. Mainly flows with Türkiye, Germany, Russia, Poland, Iraq and Czech Republic.
- ✘ **France** (-111 flights; -3%) mainly due to light AOs, Air France, Vistajet and La Baule Aviation. Flows with Germany, France, UK, Italy and Greece.
- ✘ **Spain** (-99 flights; -2%) mainly due to light AOs and domestic flows.
- ✘ **Germany** (-55 flights; -1%) mainly due to Eurowings and flows with Spain and Türkiye.

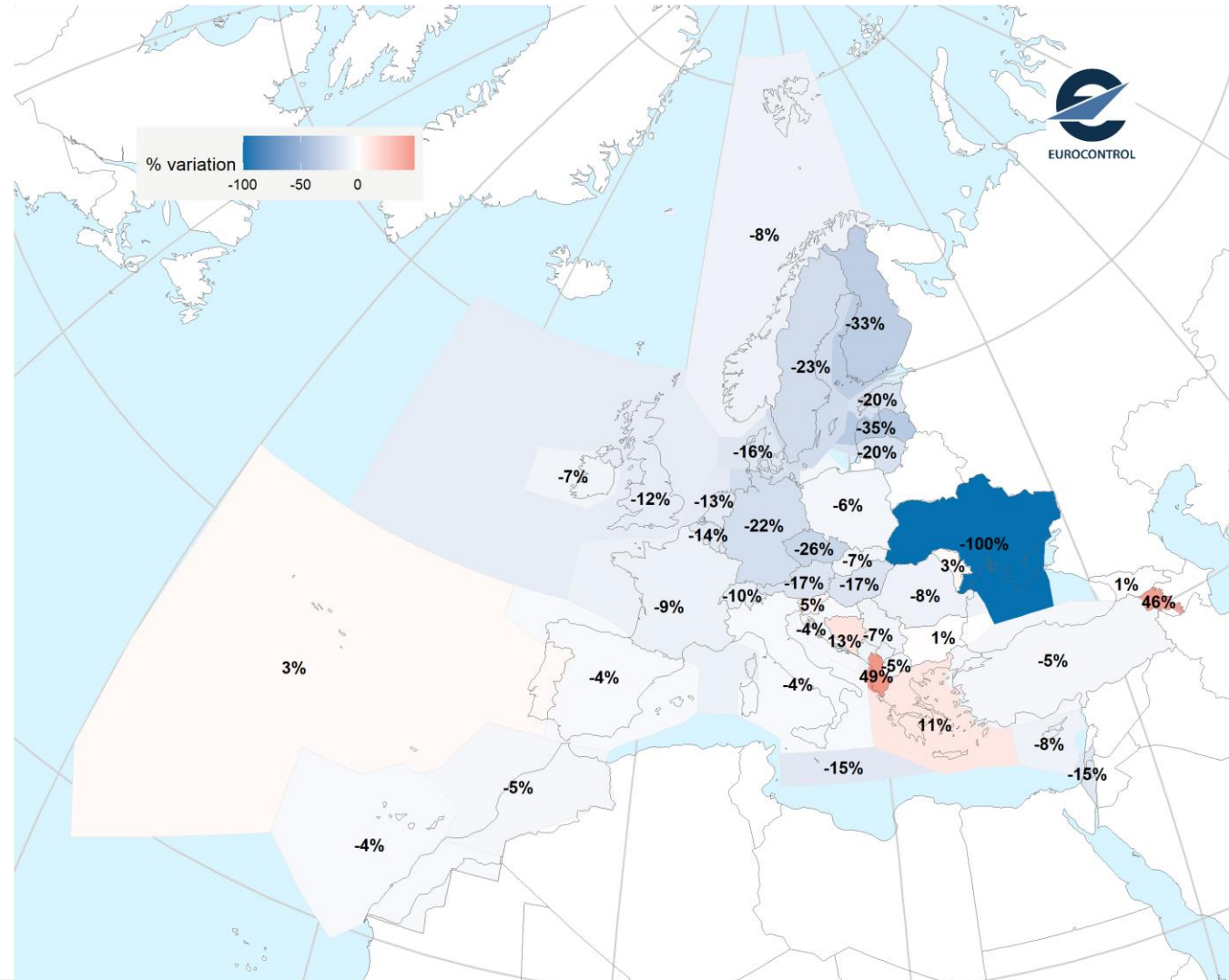


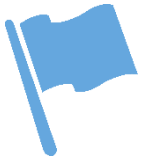
STATES (AVERAGE DAILY DEPARTURE/ARRIVAL FLIGHTS FOR THE LAST WEEK)



State FIR daily % arrivals/departures variation vs 2019 on 2022-10-11

7-day average - FIRs at altitude FL200



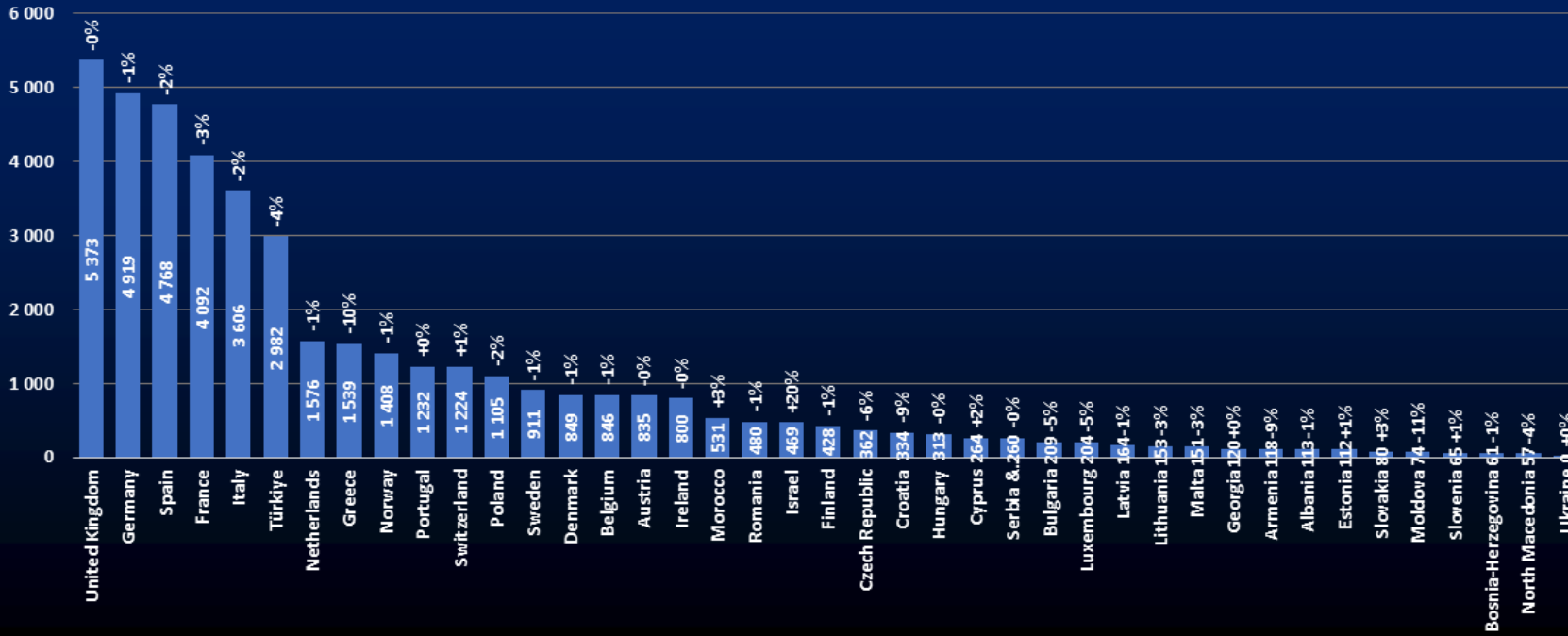


STATES (AVERAGE DAILY DEPARTURE/ARRIVAL FLIGHTS FOR THE LAST WEEK)



States (Dep/Arr flights)

Average daily flights for week 06 - 12 Oct 2022 and comparison with previous week



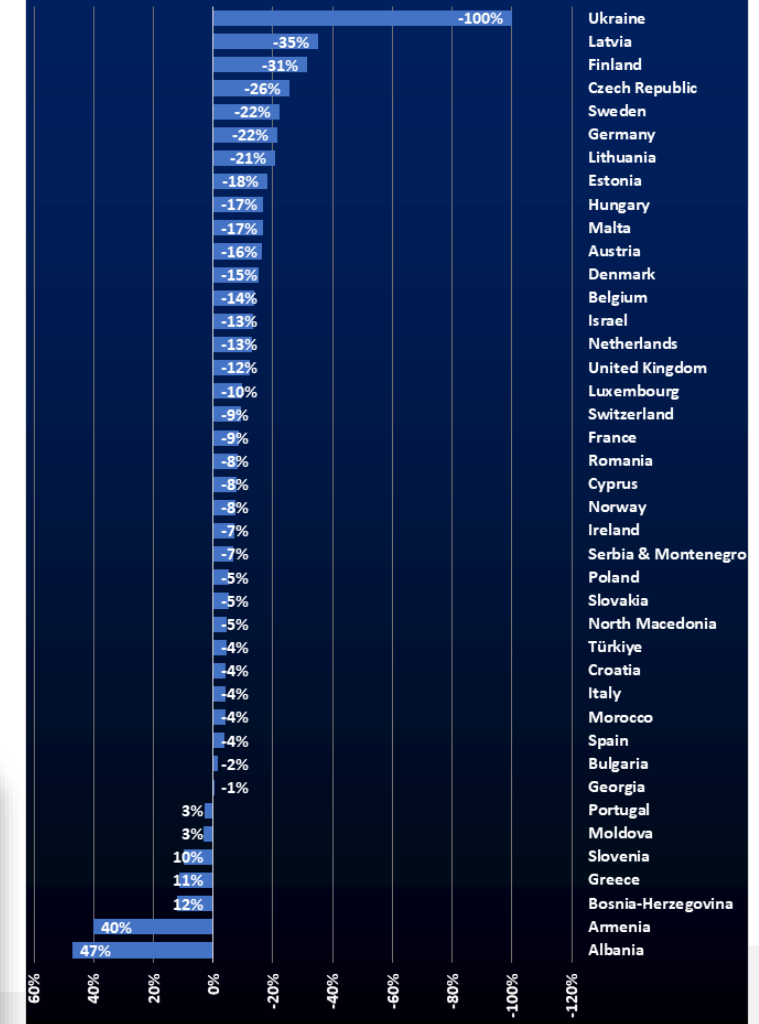
✘ Largest decreases in flights vs previous week for **Greece (-10%), Türkiye (-4%), France (-3%), Spain (-2%), Italy (-2%)** and **Germany (-1%)**.

✘ Highest increases for **France (+4%), UK (+1%), Armenia (+20%)** and **Sweden (+1%)**.

✘ Traffic levels ranging from **-100% (Ukraine)** to **+47% (Albania)**, compared to 2019.

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

IFR Dep/Arr Flights for Week 06 - 12 Oct 2022





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



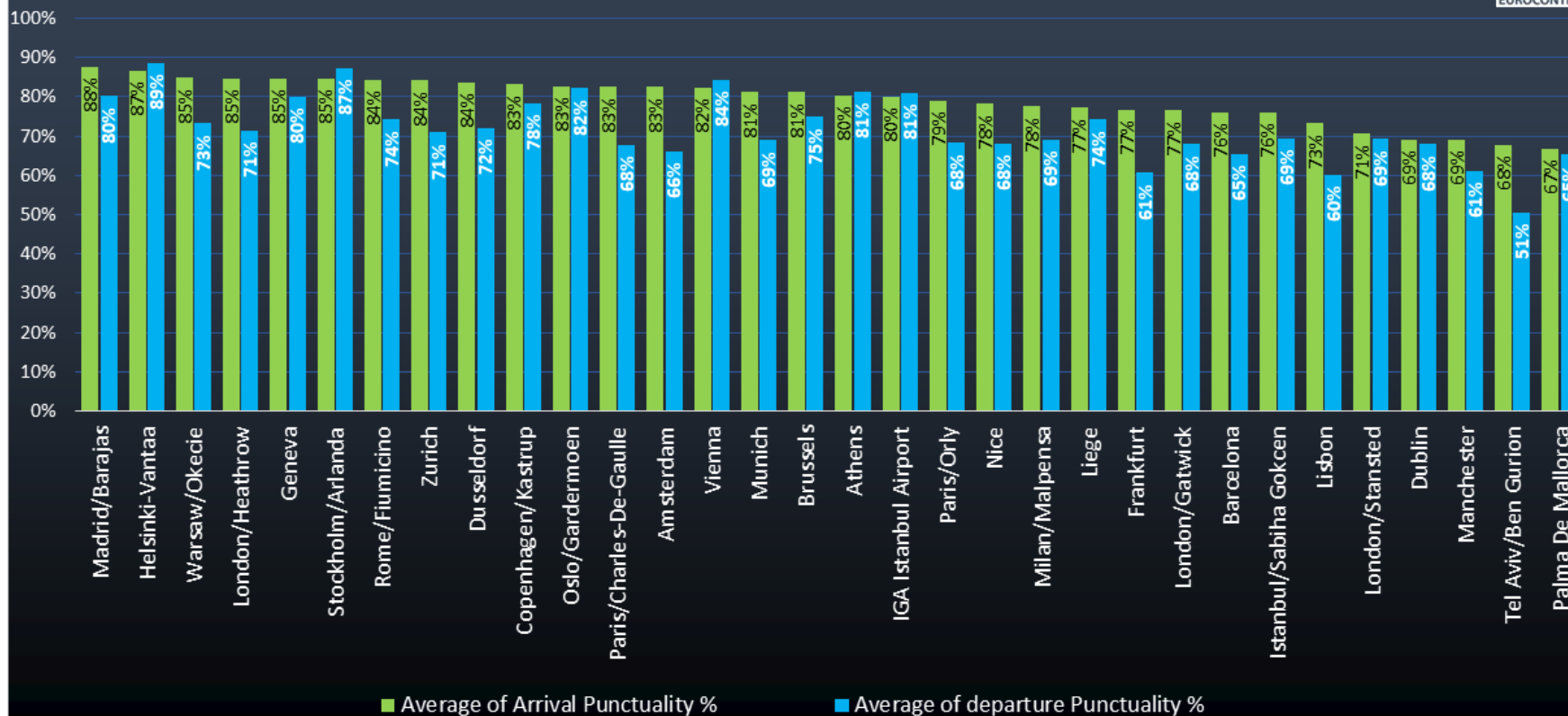
Arrival punctuality (01/01 to 12/10)



Departure punctuality (01/01 to 12/10)



Average arrival / departure punctuality at main airports for the week 6 - 12 Oct 2022



✘ Arrival and departure punctuality are improving 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](#).

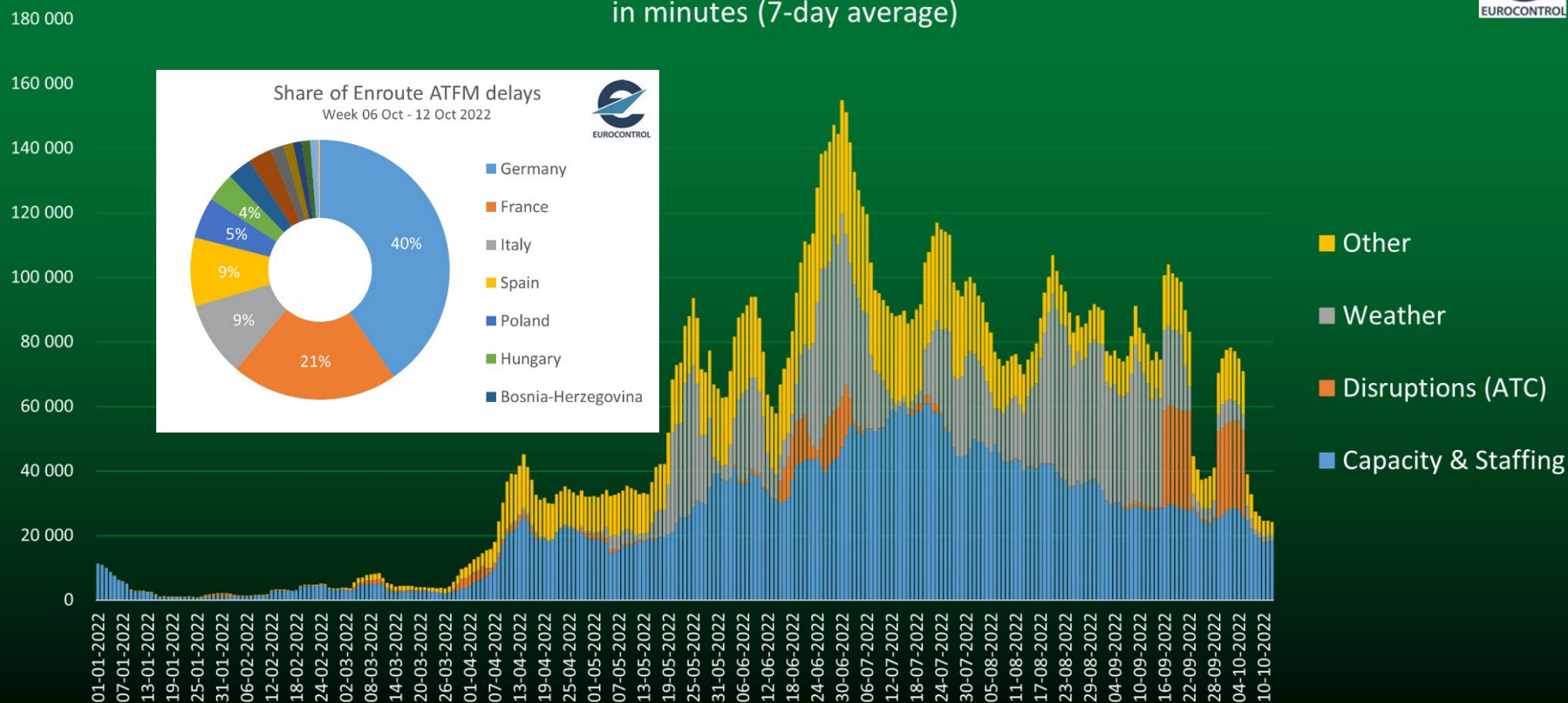


EN-ROUTE ATFM DELAYS



Enroute ATFM Delays (EUROCONTROL Area)

in minutes (7-day average)



✘ Average en-route ATFM delays over the last week (6-12 Oct.) have been below the levels of the week before. They are below 2019 levels too (see next slide).

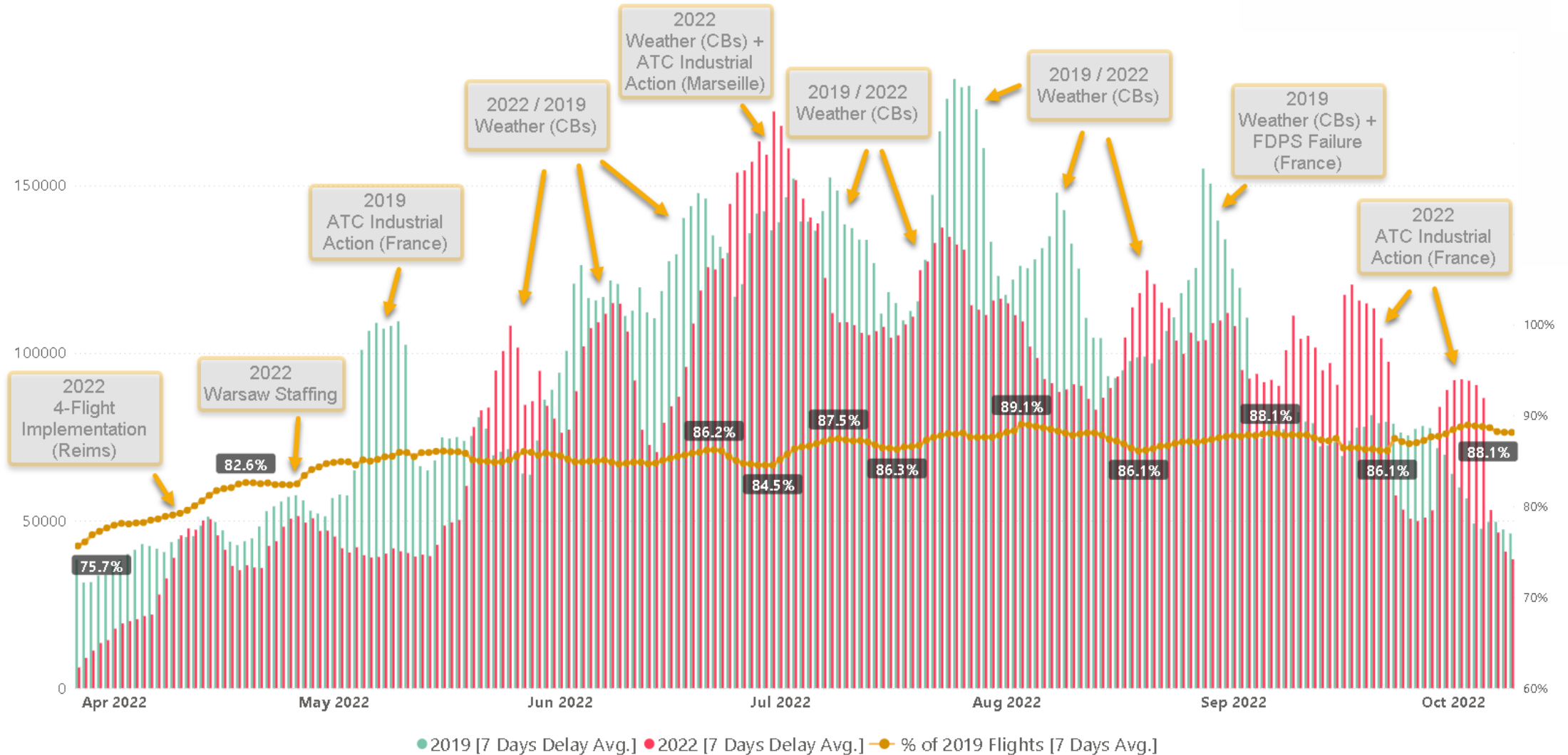
✘ Major contributors over the last 7 days: **Germany** (40% of all en-route ATFM delays), **France** (21%), **Italy** (9%), **Spain** (9%), **Poland** (5%) and **Hungary** (4%).

✘ The chart shows the evolution of a 7-day average. Therefore, the first week of October is affected by the French ATC industrial action on 29 September.



TOTAL ATFM DELAYS (ALL CAUSES, AIRPORTS AND EN-ROUTE)

2019 and 2022 (7-day average)

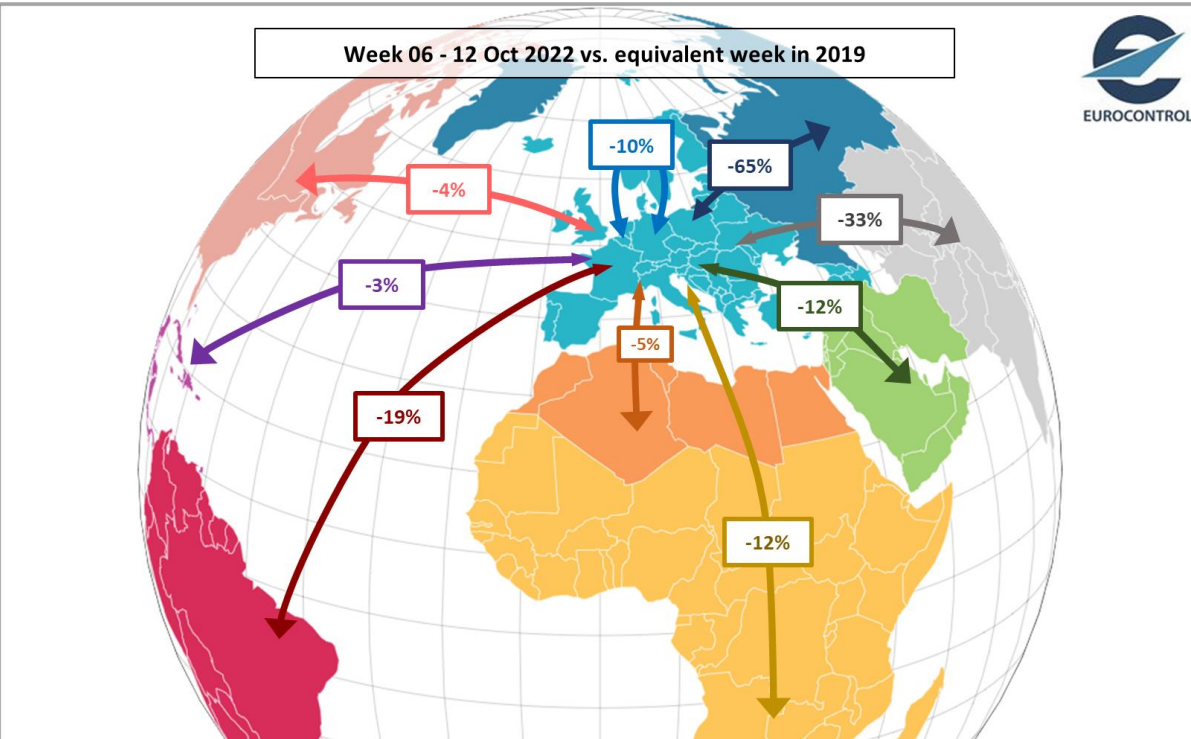




TRAFFIC FLOWS (AVERAGE DAILY DEPARTURE/ARRIVAL FLIGHTS FOR THE LAST WEEK)



- ✘ The **main traffic flow** is the **intra-Europe** flow with **22,552 flights** on average for the most recent week, -2% over the previous week.
- ✘ Flows between **Europe** and Other Europe (incl. **Russia**) are at -65% compared to 2019.
- ✘ Asia/Pacific: Flows between **Europe** and **Asia/Pacific** are at -33% 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 10% below 2019 levels while **intercontinental** flows are at -21%.



REGION (Average daily flights)	Week 29/09/2022 - 05/10/2022	Week 06/10/2022 - 12/10/2022	%	vs. 2019
Intra-Europe	22,991	22,552	-2%	-10%
Europe<->Asia/Pacific	561	548	-2%	-33%
Europe<->Mid-Atlantic	144	145	+1%	-3%
Europe<->Middle-East	1,262	1,281	+2%	-12%
Europe<->North Atlantic	1,276	1,242	-3%	-4%
Europe<->North-Africa	976	985	+1%	-5%
Europe<->Other Europe	425	403	-5%	-65%
Europe<->South-Atlantic	156	152	-2%	-19%
Europe<->Southern Africa	272	274	+1%	-12%
Non Intra-Europe	5,070	5,031	-1%	-21%



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



Share of worldwide flows to/from Europe
for week 06 Oct - 12 Oct 2022



Intra-Europe
82%

Other
18%

Europe<->Middle-East
5%

Europe<->North Atlantic
4%

Europe<->North-Africa
4%

Europe<->Asia/Pacific
2%

Europe<->Other Europe. 1%

Europe<->Southern Africa. 1%

Europe<->South-Atlantic. 1%

Europe<->Mid-Atlantic. 0%

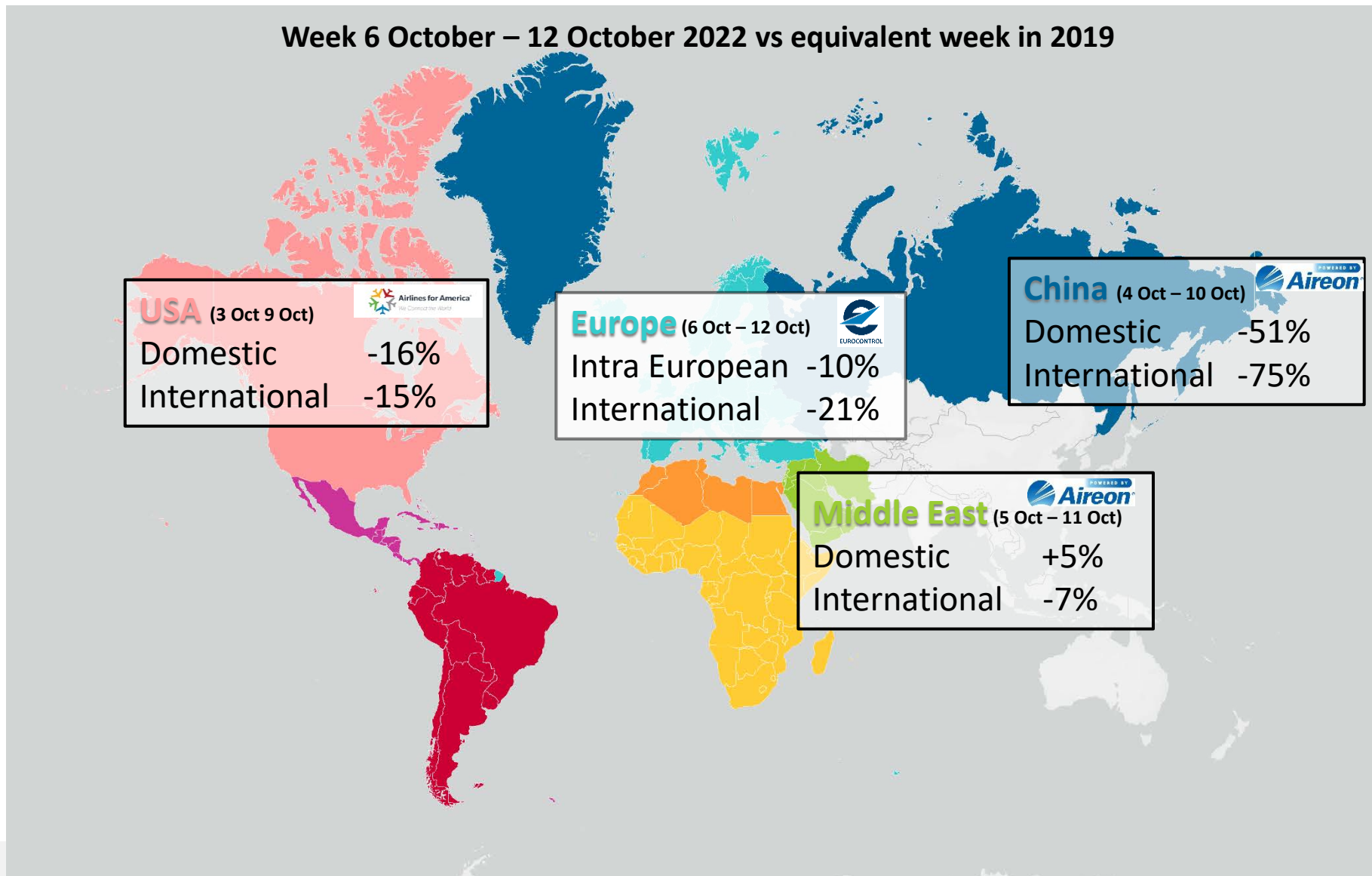
- ✘ Over last week, Intra- European flights represented 82% of the total traffic.
- ✘ The second flow is with Middle-East (5%) followed by North Atlantic and North Africa (4% for both).
- ✘ Asia/Pacific comes 4th with 2%.



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



Week 6 October – 12 October 2022 vs equivalent week in 2019





COUNTRY PAIRS (AVERAGE DAILY FLIGHTS FOR THE LAST WEEK)



Top 20

Rank evolution over prev. week	Top 10 Country-Pair on week 06 - 12 Oct 2022				
	Country-Pair	Avg daily flights	Δ vs prev. week	% vs prev. week	% vs 2019
→	Spain <-> Spain	1 208	↓ -44	-4%	→ +1%
→	France <-> France	1 023	↓ -7	-1%	↓ -11%
→	Italy <-> Italy	878	↓ -27	-3%	↑ +10%
→	Spain <-> United Kingdom	843	↑ +2	+0%	↓ -2%
→	United Kingdom <-> United Kingdom	838	→ +1	+0%	↓ -20%
→	Norway <-> Norway	815	↓ -14	-2%	↓ -3%
→	Türkiye <-> Türkiye	748	↓ -15	-2%	↓ -17%
→	Germany <-> Germany	636	↑ +24	+4%	↓ -35%
→	Germany <-> Spain	556	↓ -26	-4%	↓ -14%
→	Germany <-> Türkiye	418	↓ -25	-6%	↓ -6%

Seven of the top 10 flows are domestic.

✘ **Spain-Spain** is the country-pair with the highest number of dep/arr flights (1,208) followed by **France-France** (1,023), **Italy-Italy** (878), **Spain-UK** (843), **UK-UK** (838), **Norway-Norway** (815) and **Türkiye-Türkiye** (748).

✘ The ranking of the top 10 flows remained stable over the previous week.

Within the top 10, **seven** flows posted a decrease over the previous week for:

- ✘ **Spain-Spain** (-44 flights; -4%) mainly due to light AOs, Canarias Airlines, Air Nostrum and Air Europa.
- ✘ **Italy-Italy** (-27 flights; -3%) mainly due to Volotea, ITA Airways and NetJets.
- ✘ **Germany-Spain** (-26 flights; -4%) mainly due to Eurowings, light AOs and Condor.
- ✘ **Germany-Türkiye** (-25 flights, -6%) mainly due to Turkish Airlines, Corendon and SunExpress.

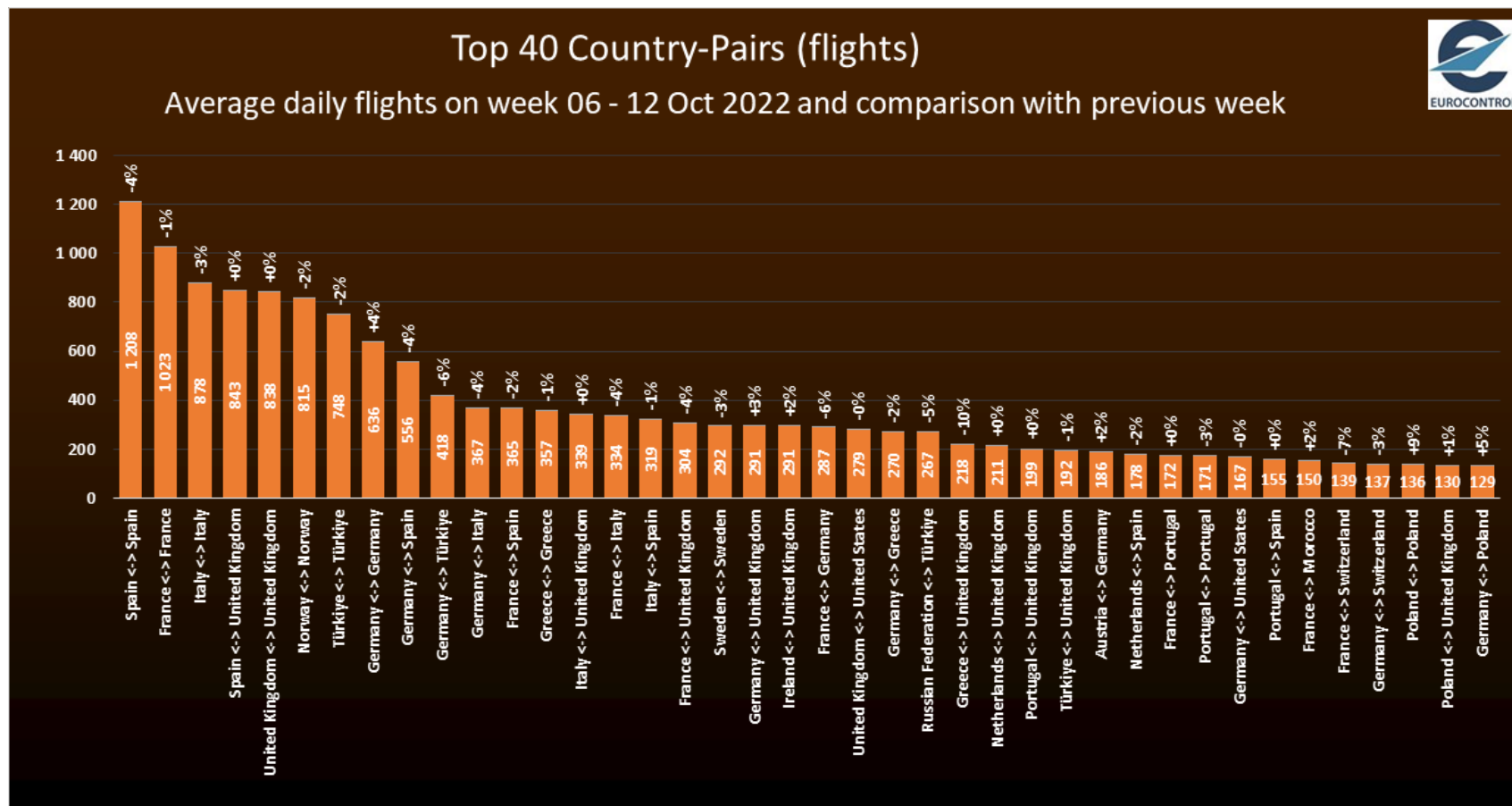
Some increases for:

- ✘ **Germany-Germany** (+24 flights; +4%) mainly due to Light AOs and Lufthansa.



COUNTRY PAIRS (AVERAGE DAILY FLIGHTS FOR THE LAST WEEK)

Top 40



- ✘ Largest decreases in flights vs previous week for **Spain-Spain** (-4%), **Italy-Italy** (-3%), **Germany-Spain** (-4%), **Germany-UK** (-10%), **Germany-Türkiye** (-6%), **France-Germany** (-6%) and **France-Italy** (-4%).
- ✘ Highest increases in flights vs previous week for **Germany-Germany** (+4%) and **Poland-Poland** (+9%).



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



Top 10

Rank evolution over prev. Week	Top 10 Airports on week 06 Oct - 12 Oct 2022				
	Airport	Average Daily Dep/Arr Flights	Δ over prev. week	% over prev. week	% vs 2019
↗	Amsterdam	1 246	↘ -16	-1%	↘ -16%
↘	IGA Istanbul Airport	1 206	↘ -67	-5%	→ -1%
→	Paris/Charles-De-Gaulle	1 190	↘ -16	-1%	↘ -18%
→	Frankfurt	1 156	↗ +3	+0%	↘ -23%
→	London/Heathrow	1 127	↗ +2	+0%	↘ -16%
→	Madrid/Barajas	1 029	↘ -14	-1%	↘ -14%
→	Munich	911	↘ -27	-3%	↘ -25%
→	Barcelona	886	↘ -13	-1%	↘ -12%
→	Palma De Mallorca	792	↘ -23	-3%	↗ +6%
→	Antalya	775	↘ -32	-4%	↘ -3%

✘ **Amsterdam** is the airport with the highest number of dep/arr flights (1,246) followed by **IGA Istanbul** (1,206), **Paris CDG** (1,190), **Frankfurt** (1,156), **London Heathrow** (1,127) and **Madrid** (1,029).

✘ **IGA Istanbul** is the busiest airport in Europe, recording flights close to in 2019 levels. **Palma de Mallorca** is the only airport in the top 10 exceeding 2019 levels (+6%).

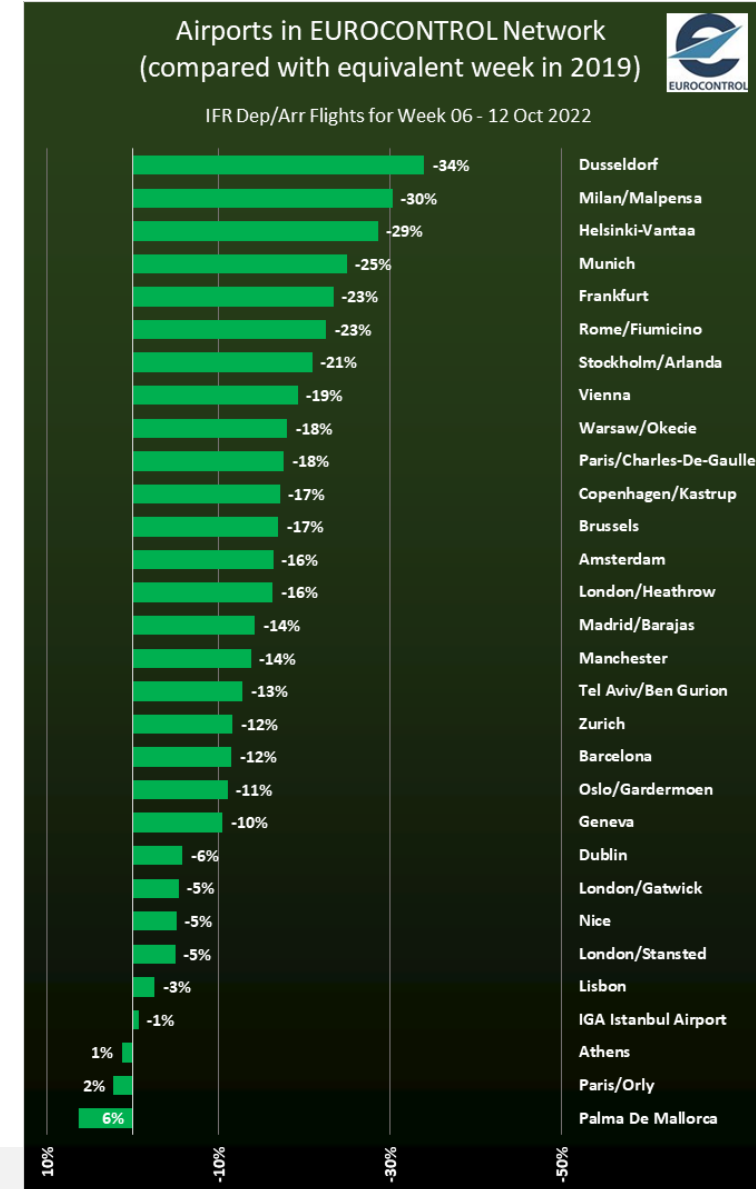
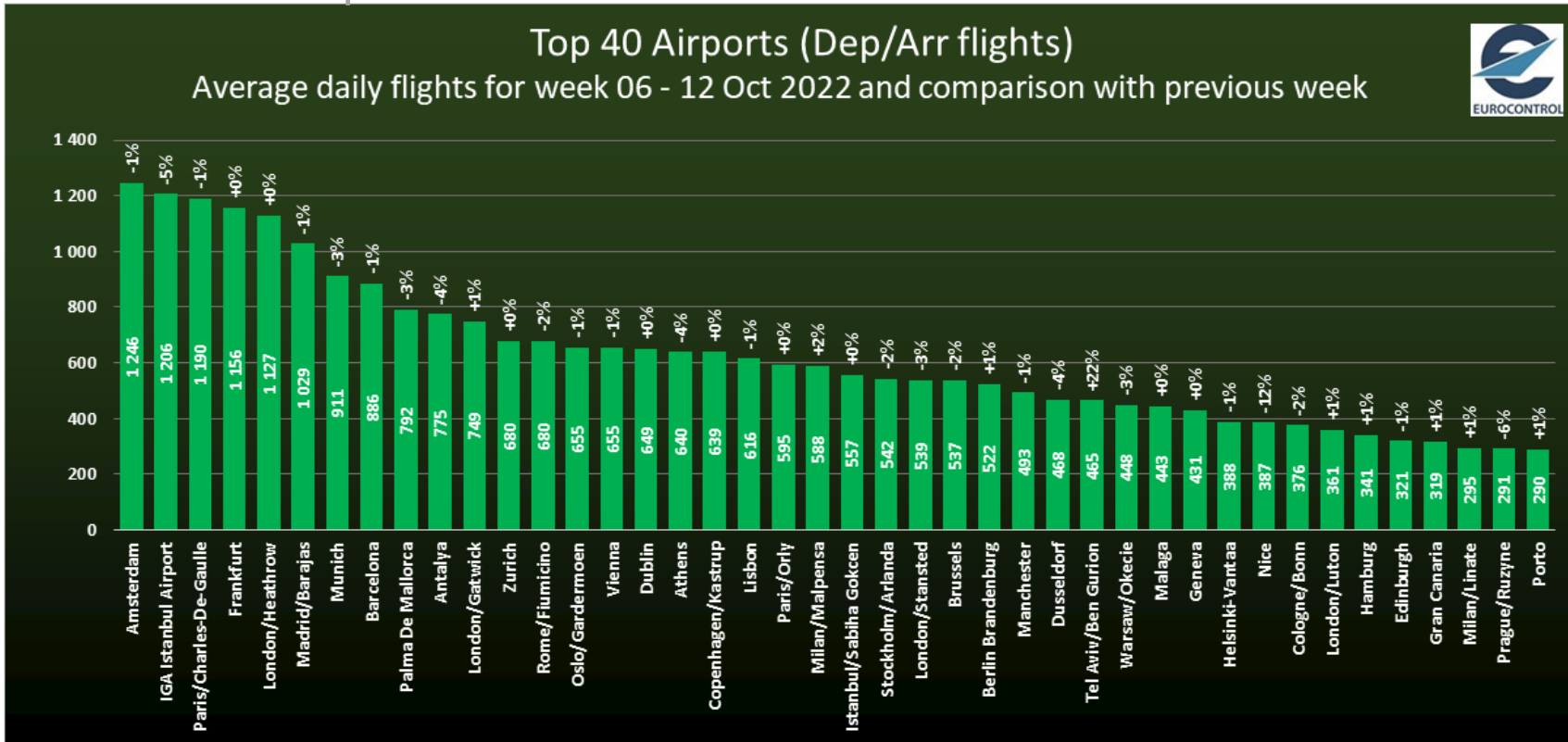
Within the top 10, **eight** airports posted **decreases** over the previous week, highest being:

- ✘ **IGA Istanbul** (-67 flights; -5%) mainly due to Turkish Airlines. Flows with Germany, Türkiye Iraq and US.
- ✘ **Antalya** (-32 flights; -4%) mainly due to Turkish Airlines, Smartwings and Corendon. Flows with Germany, Russia, Poland and Romania.
- ✘ **Munich** (-27 flights; -3%) mainly due to light AOs, Eurowings and Condor. Flows with Italy, Germany, Spain, Greece and Türkiye
- ✘ **Palma** (-23 flights; -3%) mainly due to Eurowings and Condor. Flows with Germany, France, Austria and Spain.



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

Top 40



✘ Largest decreases in flights vs the previous week for **IGA Istanbul** (-5%), **Nice** (-12%), **Antalya** (-4%), **Athens** (-3%), **Munich** (-3%), **Palma** (-3%) and **Düsseldorf** (-4%).

✘ Highest for **Tel Aviv** (+22%).

✘ Traffic levels ranging from -34% (Düsseldorf) to +6% (Palma) compared to 2019.

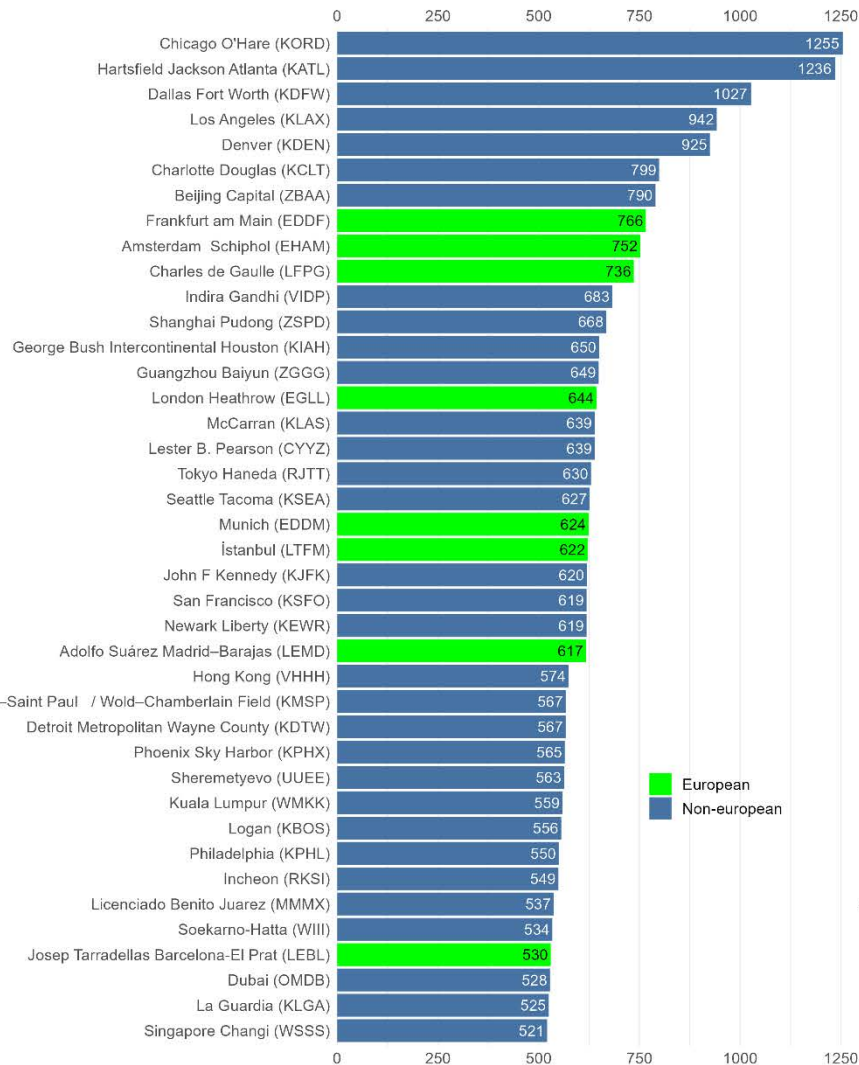


TOP 40 GLOBAL AIRPORTS (AVERAGE DAILY DEPARTURE FLIGHTS)

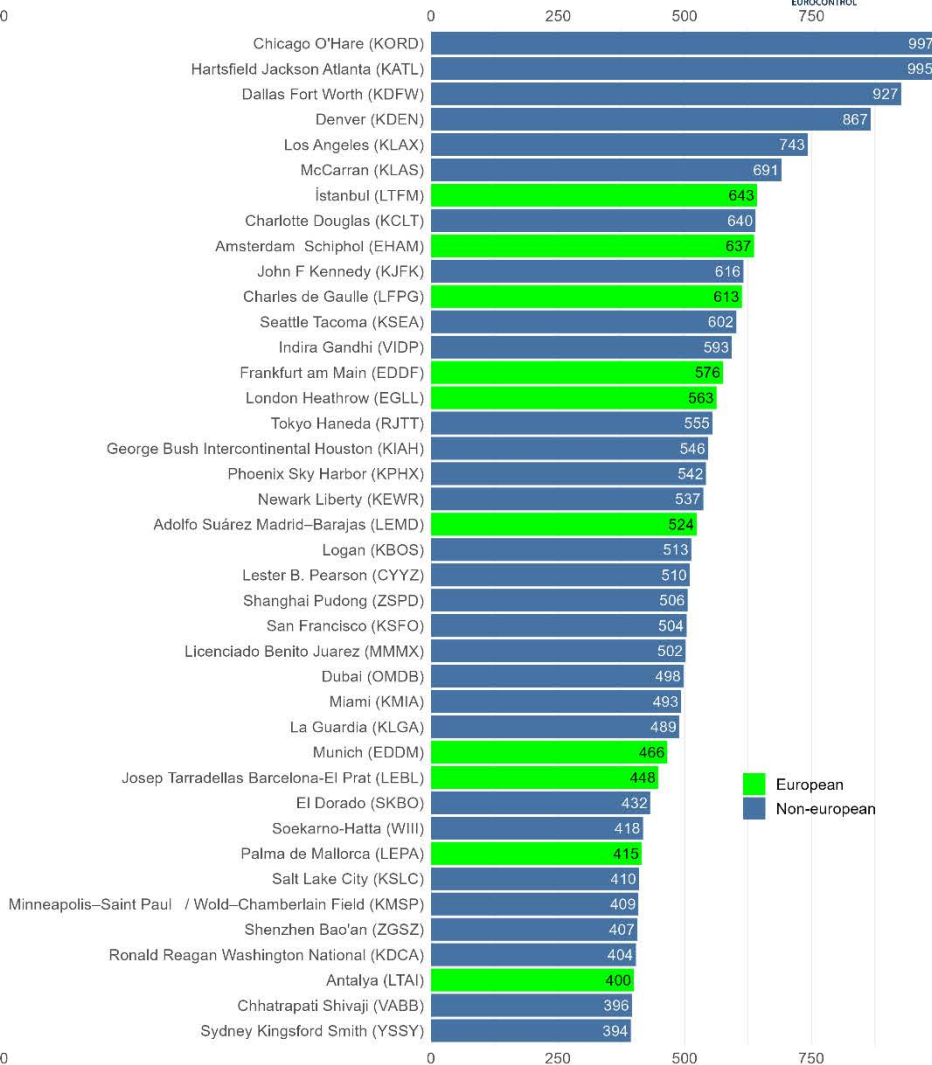


Top 40 worldwide airport departures

7-day average on 2019-10-02



7-day average on 2022-10-02



Comparing week ending 2 October (right) with the same week in 2019 (left):

✘ **10 European airports** are ranked in the **Top 40** global airports (vs 8 in 2019)

✘ **Two European airports** are in the Top 10: IGA Istanbul (7th) and Amsterdam (9th).

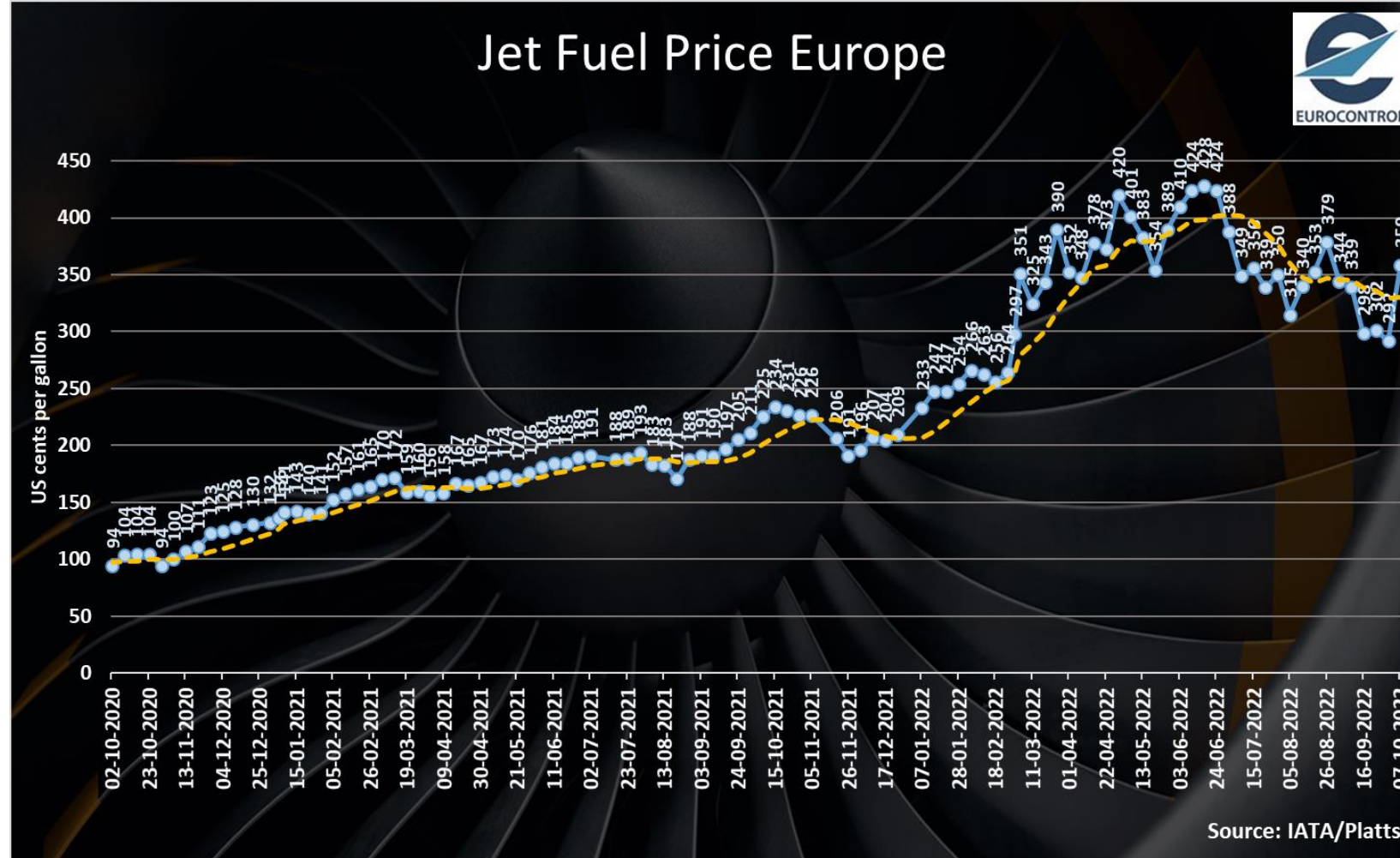
✘ Paris CDG, Frankfurt and London Heathrow are in the **Top 15**.

✘ **Nine of the Top 15 global airports** are currently based in the **US**.

✘ **The first Asian airport in 2022 is New Delhi (13th).**



FUEL PRICES



✦ **Jet fuel prices** surged to 359 cts/gallon on 7 October (+19% over two weeks, +54% since 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:

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.



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