

25 May 2022



# EUROCONTROL

Comprehensive Assessment

# EUROPEAN AVIATION



SUPPORTING EUROPEAN AVIATION



NETWORK  
MANAGER



# Headlines (Week of 18 – 24 May 2022)

- 27,720 daily flights on average over past week (+2% vs previous week); 85% of 2019 levels.
- Traffic slightly above the high EUROCONTROL Traffic Scenarios (6 Apr 2022): 86% for May vs 2019 so far.
- Low-cost airlines are 12% below 2019 levels, recovering faster than Mainline and Regional airlines (-24% and -25% respectively). Recovery of Charter airlines is negatively affected since the invasion of Ukraine started.
- The invasion of Ukraine is affecting overflights in a number of countries, notably Lithuania, Poland, Estonia and Latvia on the negative side; Armenia, Albania and Bosnia-Herzegovina on the positive side.
- Ryanair was the busiest aircraft operator last week with 2,864 flights per day on average (+13% vs 2019), followed by easyJet (1,576; -14% vs 2019), Turkish (1,323; +1% vs 2019), Lufthansa (1,212; -26% vs 2019), Air France (973; -24% vs 2019), KLM (793; -16% vs 2019) and Wizz Air (737; +21% vs 2019).
- Domestic traffic vs 2019: Europe (-13%), USA (-14%), China (-60% - COVID) and Middle-East (+1%).
- Two European airports (Amsterdam and Istanbul IGA) joined the Top10 Global airports.
- Jet fuel prices increased at 354 cts/gallon on 20 May (-12% over two weeks, +52% since early January).



## Traffic Situation

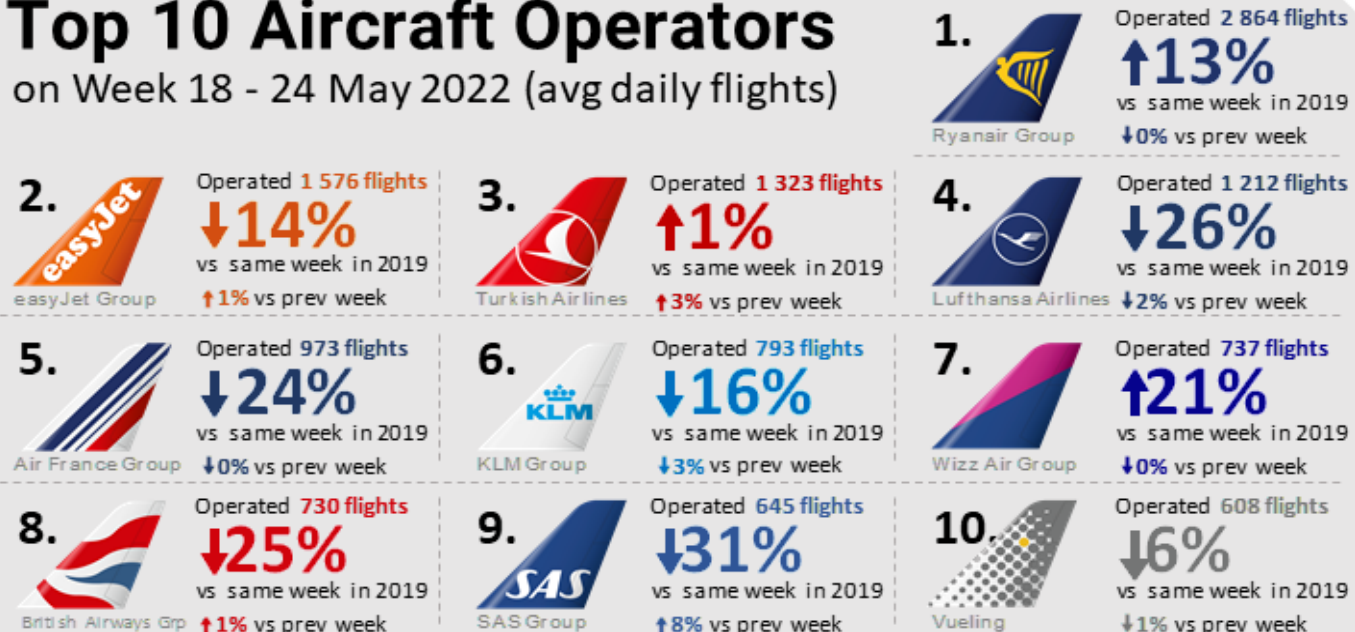
Average daily flights (including overflights)

On week 18 - 24 May 2022

**85%** of equivalent week in 2019

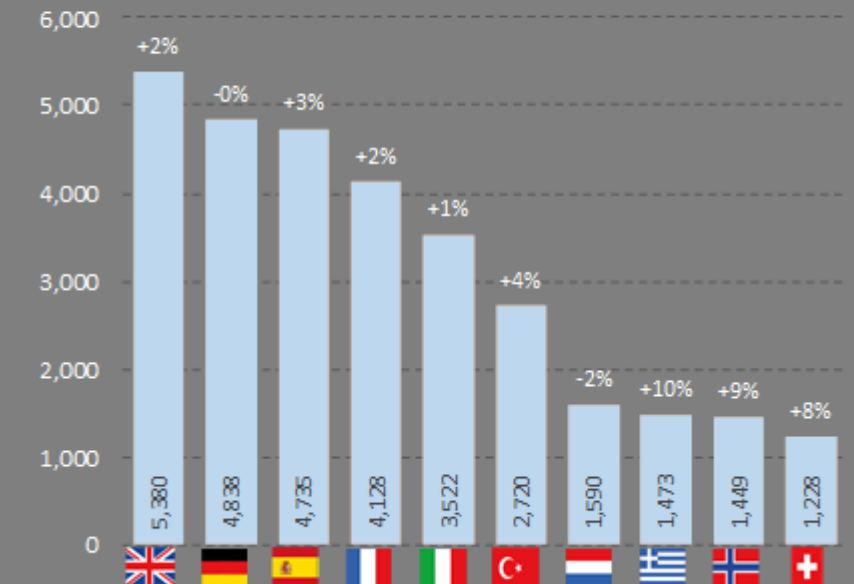
## Top 10 Aircraft Operators

on Week 18 - 24 May 2022 (avg daily flights)

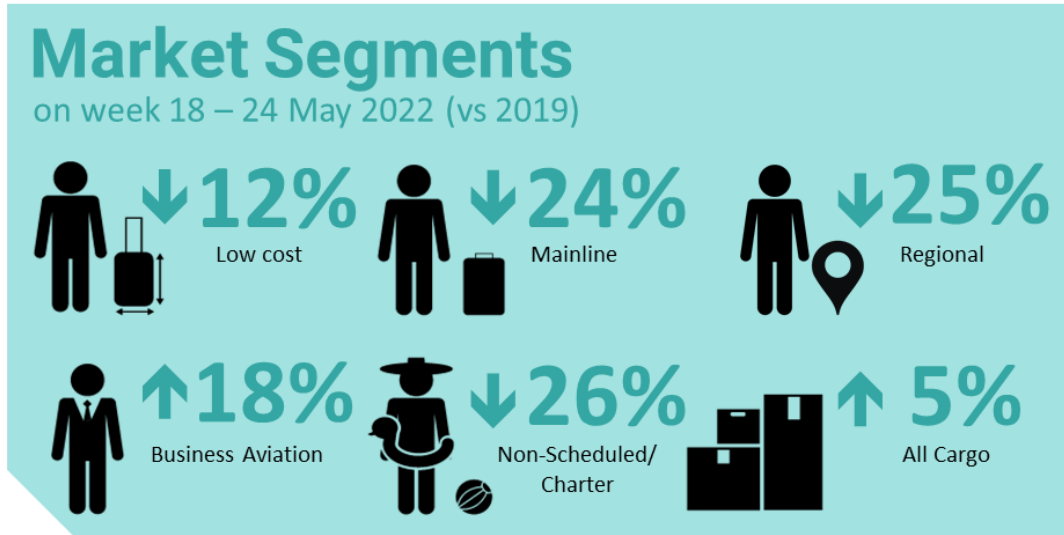
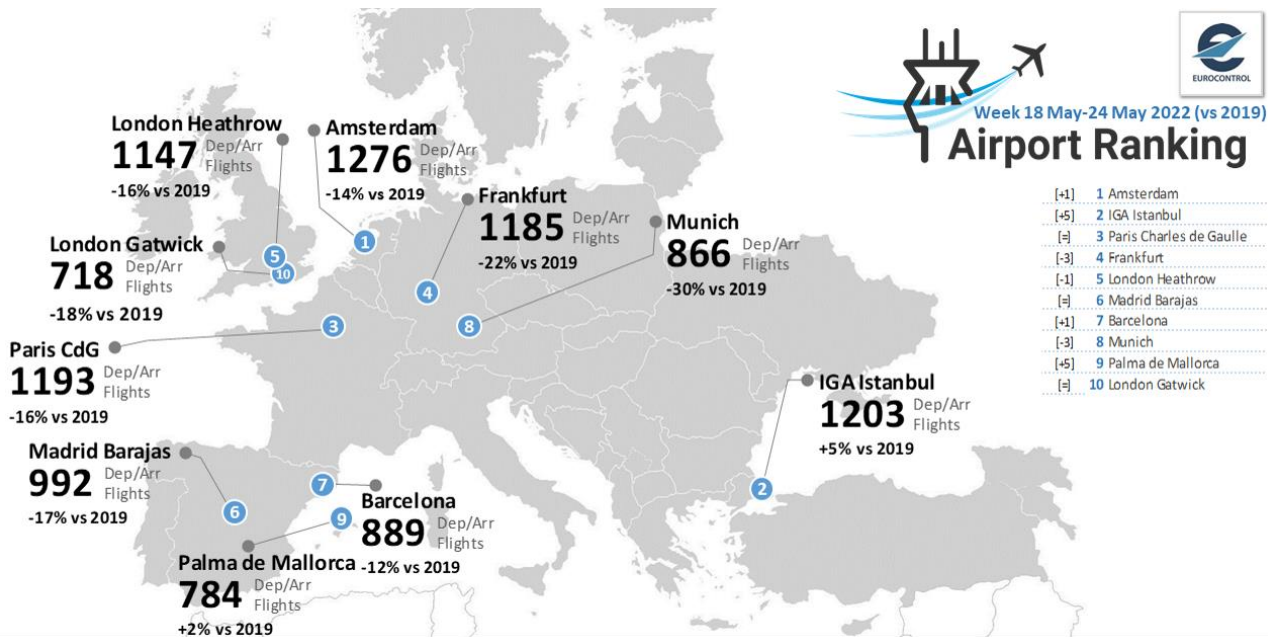


## Top 10 Busiest States

on week 18 - 24 May 2022 (avg daily flights)  
(Dep/Arr flights and comparison with previous week)



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



## Traffic Flow

Average daily flights on week of 18 - 24 May 2022

	Flights	vs previous week	vs 2019
Intra-European	22,655	+2%	-13%
Intercontinental	4,446	+1%	-26%

## Route charges

(April 2022)

Amount billed:  
**€ 613 million**

Jan-Apr 2022 amount billed:  
**€ 1,967 million**  
vs. Jan-Apr 2019  
**↓ (-14%)**

Source: EUROCONTROL

## Economics

(20 May 2022)

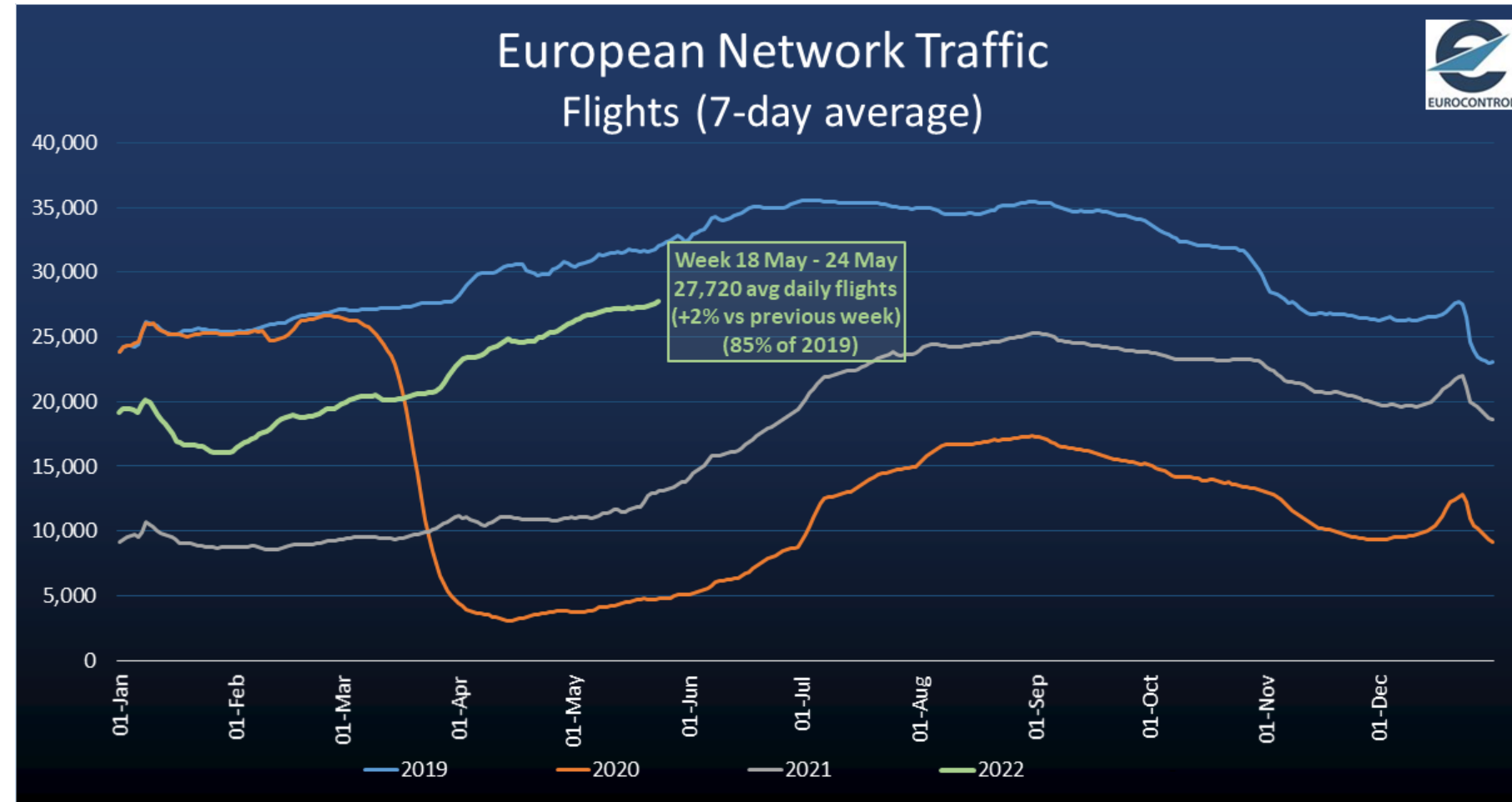
Fuel price  
**↓ 354**  
cents/gallon  
compared to  
401 cents/gallon on 6 May 2022

Source: IATA/Platts

# Overall traffic situation at network level

## On week 18 – 24 May:

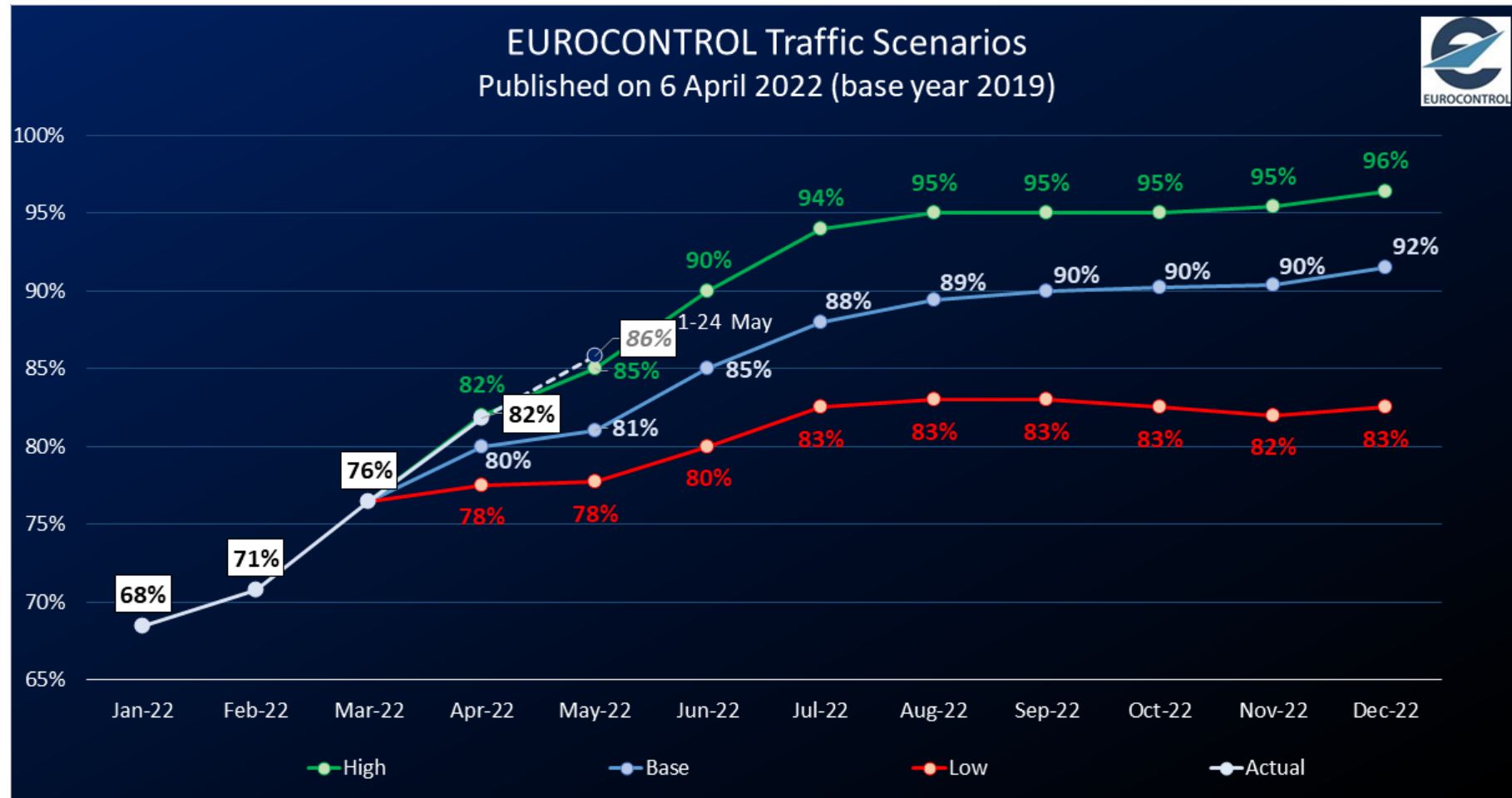
- ✂ 27,720 average daily flights.
- ✂ +2% on previous week.
- ✂ 85% of 2019 traffic levels.
- ✂ Constant increase since mid April 2022.



# Current situation compared to the latest EUROCONTROL traffic scenarios



- ✘ EUROCONTROL published new traffic scenarios on 6 April 2022.
- ✘ For the first 24 days of **May**, network traffic was at **86% of 2019** levels, slightly above the high scenario.
- ✘ On a year to date basis, network traffic in 2022 stands at **75%** of 2019.



# Aviation Sustainability

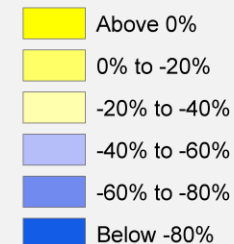


## CO<sub>2</sub> variation Jan to Apr 2022 vs 2019 - Departing Flights



**Network:**

- Traffic variation -24%
- CO<sub>2</sub> variation -27%

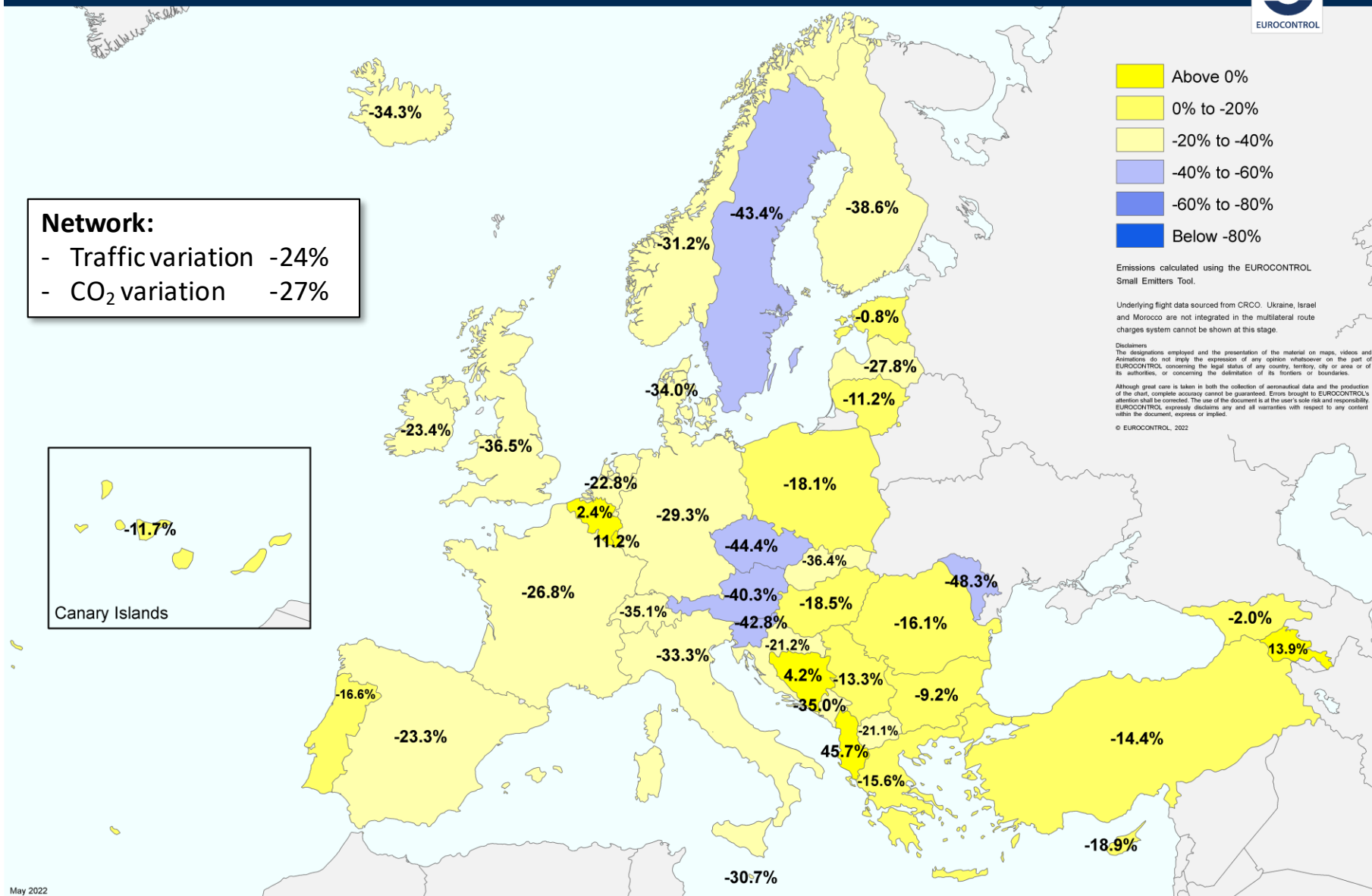


Emissions calculated using the EUROCONTROL Small Emitters Tool.

Underlying flight data sourced from CRCO. Ukraine, Israel and Morocco are not integrated in the multilateral route charges system cannot be shown at this stage.

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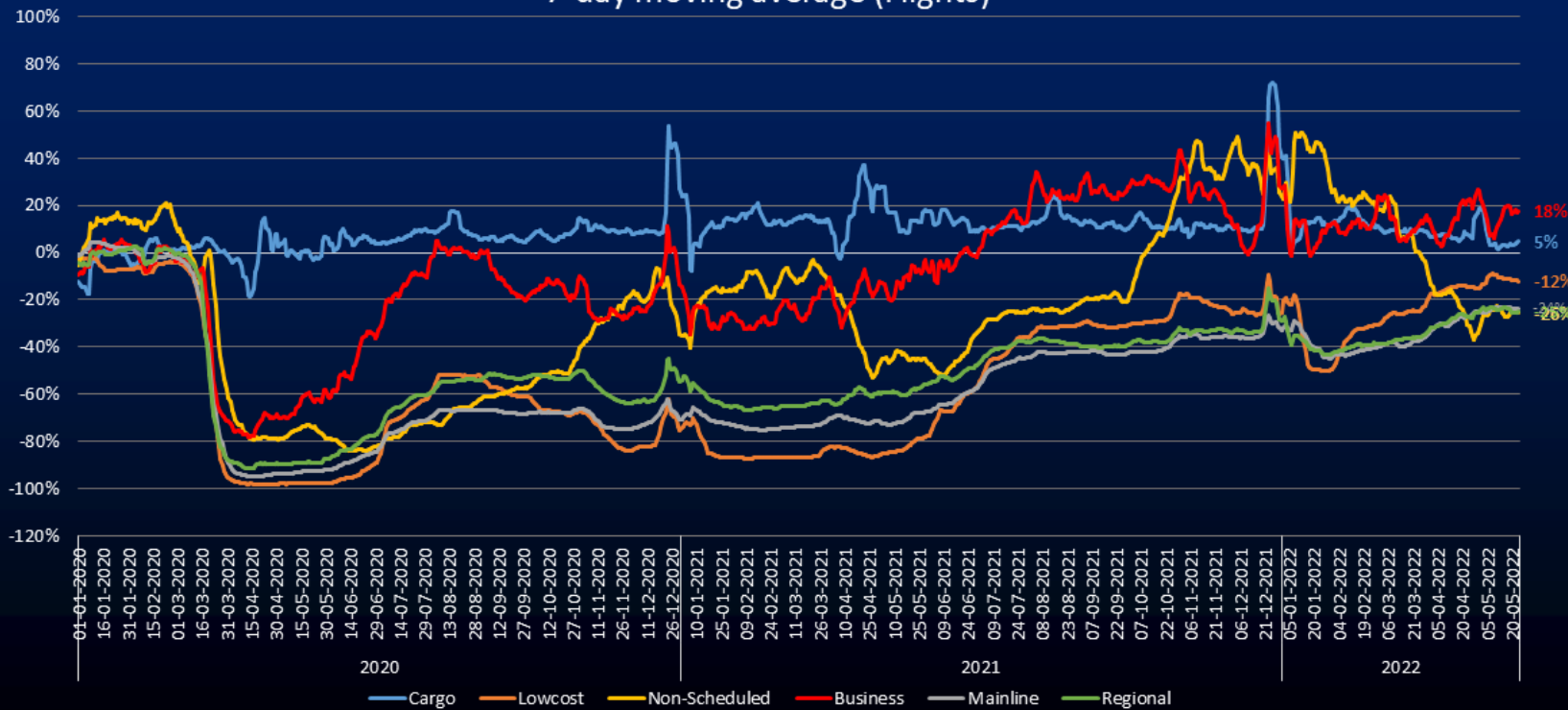
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# Market Segments

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



Up until the 24<sup>th</sup> of May 2022, compared to 2019:

- ✘ Two segments are above 2019 levels: **All-cargo (+5%)** and **Business Aviation (+18%)**.
- ✘ **Low-Cost (-12%)** recorded a continuous increase since the beginning of 2022, but stagnates over the past 2 weeks.
- ✘ **Charter (-26%)** decrease mainly since the start of the Russian invasion of Ukraine.
- ✘ **Mainline (-24%)** and **Regional (-25%)** continued to catch up vs 2019 since the beginning of 2022, remaining stable over the recent weeks.

**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 (18 - 24 May 2022)		
	Average flights per day	% vs 2019	% over previous week
RYANAIR	2,864	+13%	-0%
easyJet	1,576	-14%	+1%
TURKISH AIRLINES	1,323	+1%	+3%
Lufthansa	1,212	-26%	-2%
AIRFRANCE	973	-24%	-0%
KLM Royal Dutch Airlines	793	-16%	-3%
Wizz	737	+21%	-0%
BRITISH AIRWAYS	730	-25%	+1%
Scandinavian Airlines	645	-31%	+8%
vueling	608	-6%	-1%

Within the top 10, **3 airlines** posted **increases** over the previous week, highest being:

- ✘ **Turkish Airlines** (+35 flights; +3%) mainly due to domestic as well as flows with Russia and US.
- ✘ **easyJet** (+20 flights; +1%) mainly due to Spain-UK, France-France, UK-UK, Italy-UK and Italy-Italy.
- ✘ **British Airways** (+8 flights; +1%) mainly due to Spain-UK, France-UK, Greece-UK and Italy-UK.

Main decreases for:

- ✘ **Lufthansa** (-24 flights; -2%) mainly due to domestic, Germany-Italy, Germany-UK and Germany-Switzerland.
- ✘ **KLM** (-24 flights; -3%) mainly due to Germany-Netherlands, Netherlands-UK and Italy-Netherlands.
- ✘ **Vueling** (-5 flights; -1%) mainly due to Spain-Spain, France-Italy and France-Spain.

✘ **Ryanair** is the busiest Aircraft Operator with 2,864 flights per day on average over last week, followed by **easyJet** (1,576), **Turkish Airlines** (1,323), **Lufthansa** (1,212), **Air France** (973), **KLM** (793) and **Wizz Air** (737).

✘ The rankings remained unchanged compared with previous week.



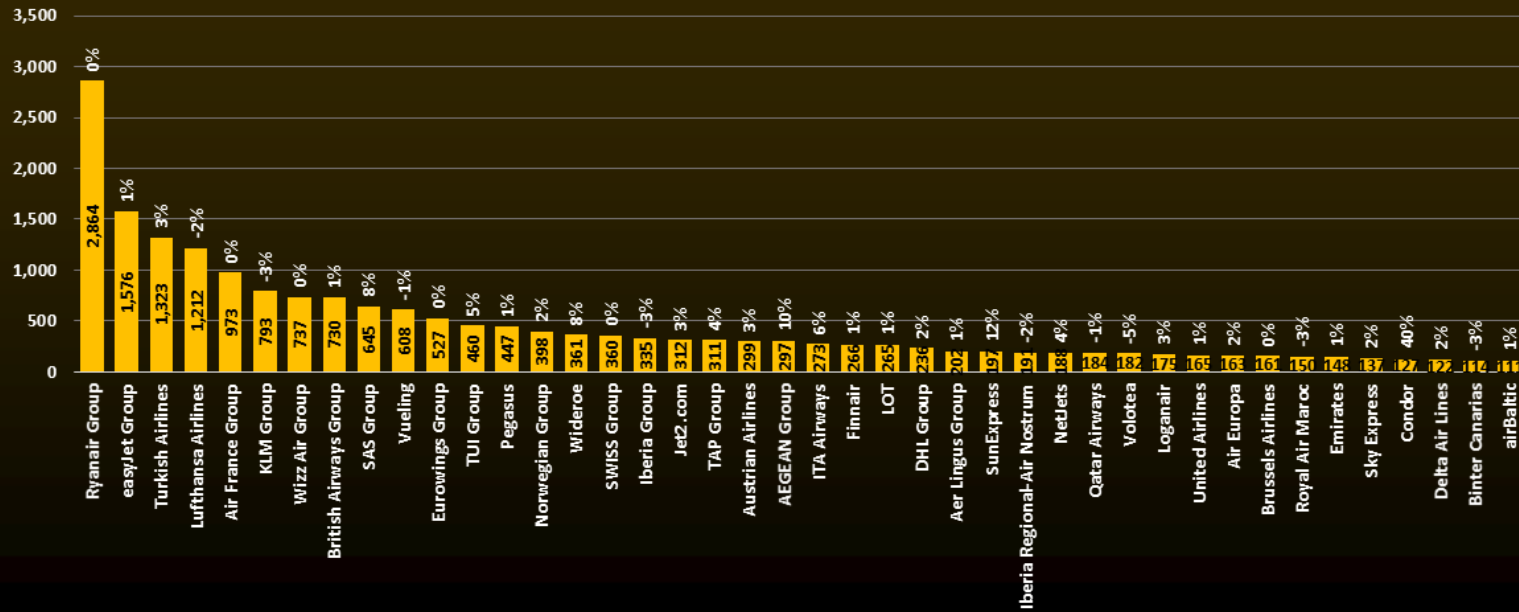
# Aircraft operators (Average daily flights for the last week)

Top 40



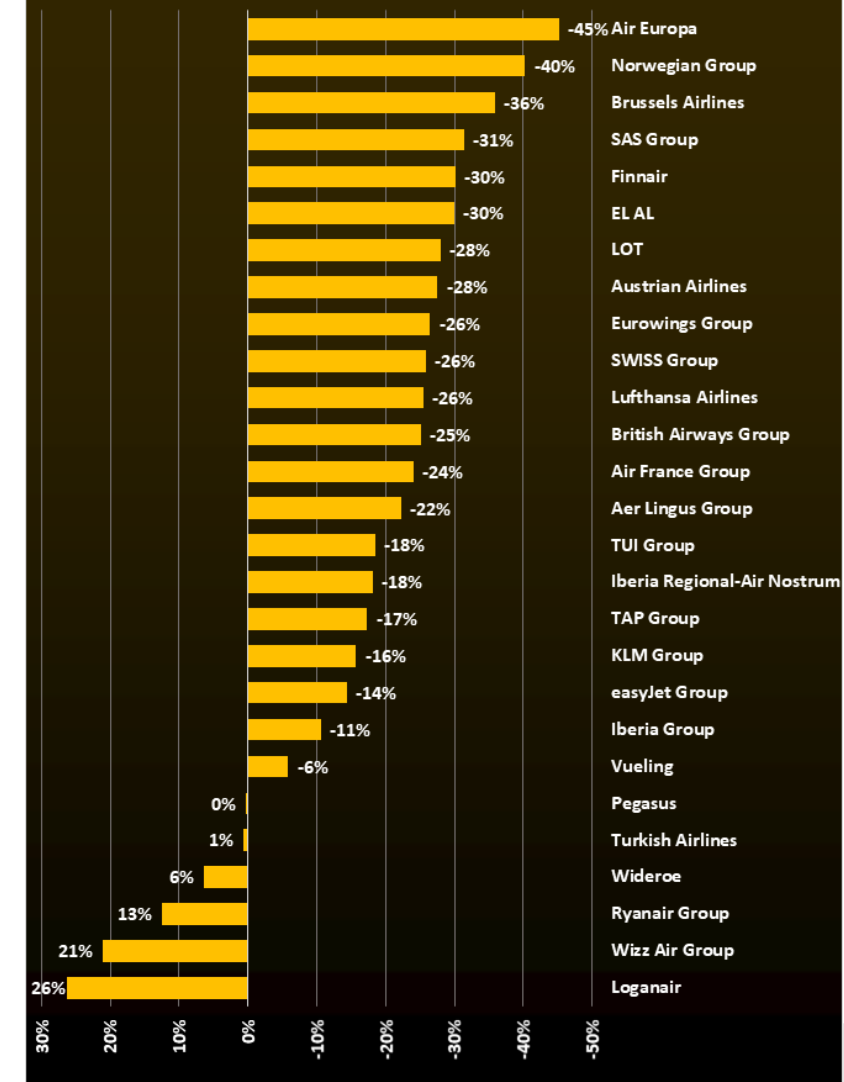
## Aircraft operators

Average daily flights for week 18 - 24 May 2022 and comparison with previous week



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

IFR Flights for Week 18 - 24 May 2022

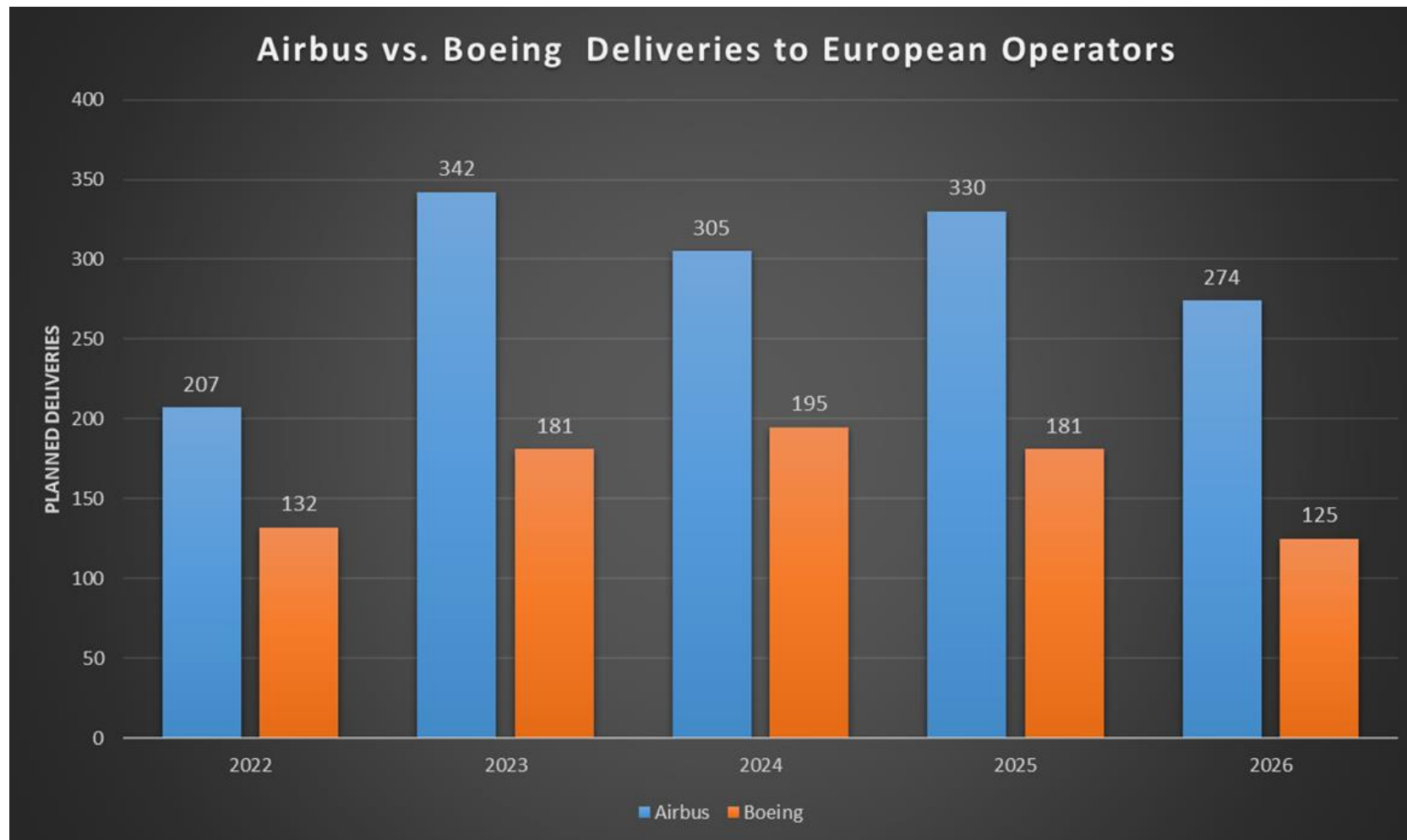


✦ Largest increases in flights vs previous week for **SAS (+8%)**, **Condor (+40%)**, **Turkish Airlines (+3%)**, **Aegean (+10%)**, **Wideroe (+8%)**, **TUI (+5%)**, **Sun Express (+12%)**, **easyJet (+1%)**, **ITA Airways (+6%)** and **TAP (+4%)**.

✦ Highest decreases for **Lufthansa (-2%)**, **KLM (-3%)** and **Iberia (-3%)**.

✦ Traffic levels ranging from **-45% (Air Europa)** to **+26% (Loganair)** vs 2019.

# New Aircraft Deliveries (Airbus vs. Boeing)



European aircraft deliveries as of mid-May 2022:

- ✘ Since the beginning of 2022: 75 more sustainable NEO (31) and MAX (44) aircraft delivered.
- ✘ **Ryanair** Group leading the way with (28) 737 MAX 8-200 deliveries.
- ✘ **IAG** diversifies fleet by ordering 50 737MAX with a further 100 aircraft on option. Deliveries starting in 2023.

# Aircraft operators (Average daily flights for the last week)

Cargo, Legacy, Low Cost and Regional Carriers



## PERFORMANCE OF MAJOR CARGO CARRIERS

for the week 18 - 24 May 2022



## PERFORMANCE OF MAJOR LOW-COST CARRIERS

for the week 18 - 24 May 2022



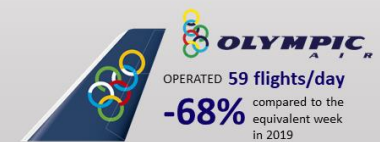
## PERFORMANCE OF MAJOR LONG-HAUL/LEGACY CARRIERS

for the week 18 - 24 May 2022



## PERFORMANCE OF MAJOR REGIONAL CARRIERS\*

for the week 18 - 24 May 2022













\*REGIONAL AIRLINES USING SEPARATE IATA CODES

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



## Top 10 States

on week 18 - 24 May 2022 (avg daily dep/arr)

1.  United Kingdom	5 380 flights ↓17% vs same week in 2019 ↑2% vs prev week
2.  Germany	4 838 flights ↓21% vs same week in 2019 ↓0% vs prev week
3.  Spain	4 735 flights ↓6% vs same week in 2019 ↑3% vs prev week
4.  France	4 128 flights ↓15% vs same week in 2019 ↑2% vs prev week
5.  Italy	3 522 flights ↓9% vs same week in 2019 ↑1% vs prev week
6.  Turkey	2 720 flights ↓6% vs same week in 2019 ↑4% vs prev week
7.  Netherlands	1 590 flights ↓12% vs same week in 2019 ↓2% vs prev week
8.  Greece	1 473 flights ↓5% vs same week in 2019 ↑10% vs prev week
9.  Norway	1 449 flights ↓6% vs same week in 2019 ↑9% vs prev week
10.  Switzerland	1 228 flights ↓11% vs same week in 2019 ↑8% vs prev week

✘ **UK** is the State with the highest number of dep/arr flights on average over last week (5,380) followed by **Germany** (4,838), **Spain** (4,735), **France** (4,128) and **Italy** (3,522).

✘ The rankings remained unchanged compared with the previous week.

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

✘ **Spain** (+149 flights; +3%): mainly light AOs, Condor and Smartwings. Flows with Germany, UK, France and domestic flows.

✘ **Greece** (+133 flights; +10%): Aegean, Condor and light AOs. Domestic flows as well as flows Germany, Austria and UK.

✘ **Norway** (+120 flights; +9%): Mainly SAS, Wideroe and light AOs. Domestic flows as well as flows with Denmark, Greece and UK.

✘ **Turkey** (+98 flights; +4%): Mainly Turkish Airlines, Sun Express, light AOs and Pegasus. Domestic flows, flows with Germany, Kazakhstan and Russia.

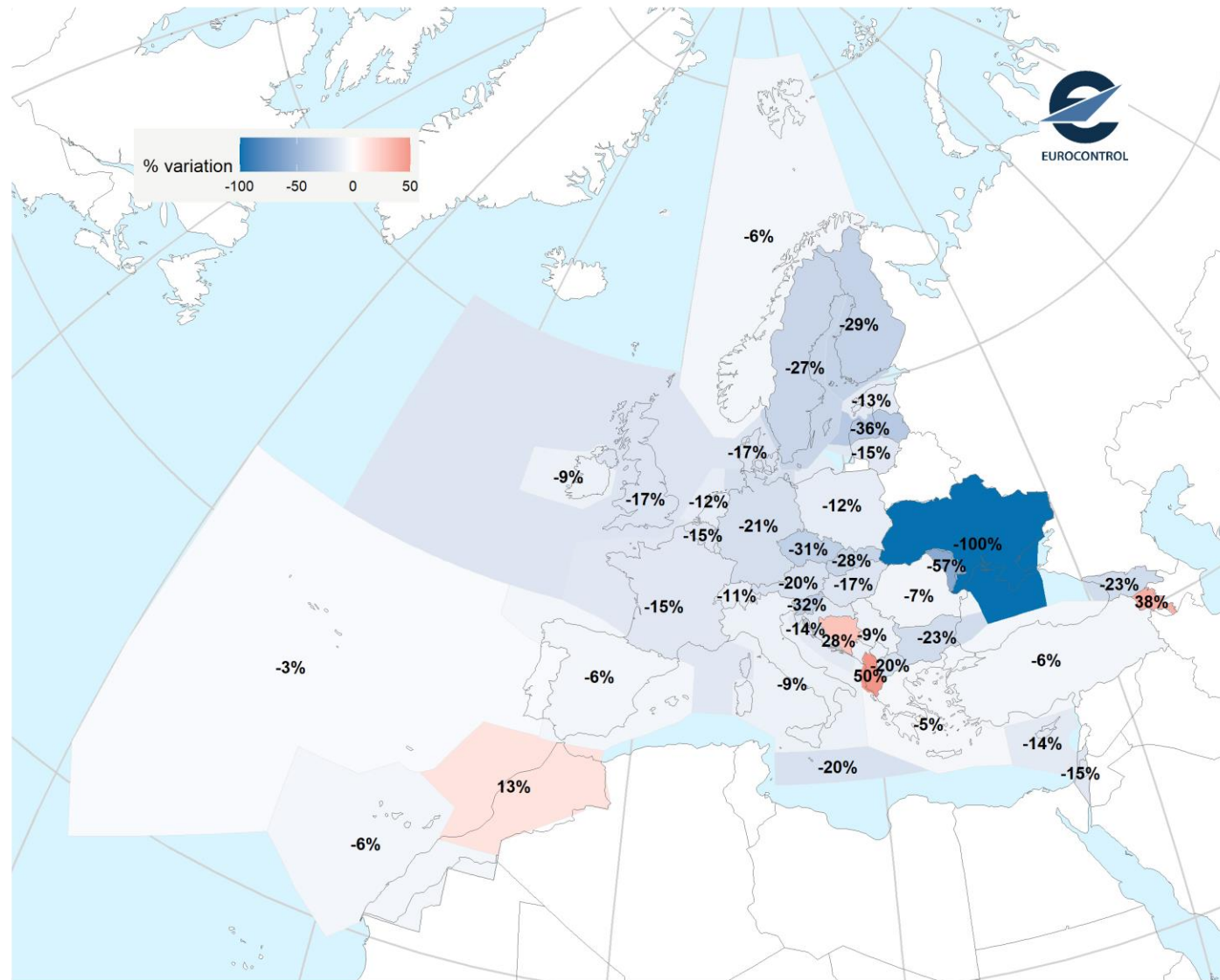
✘ **France** (+97 flights; +2%): Mainly light AOs, NetJets and Vistajet. Flows with Spain, UK and domestic flows.

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



State FIR daily % arrivals/departures variation vs 2019 on 2022-05-24

7-day average - FIRs at altitude FL200



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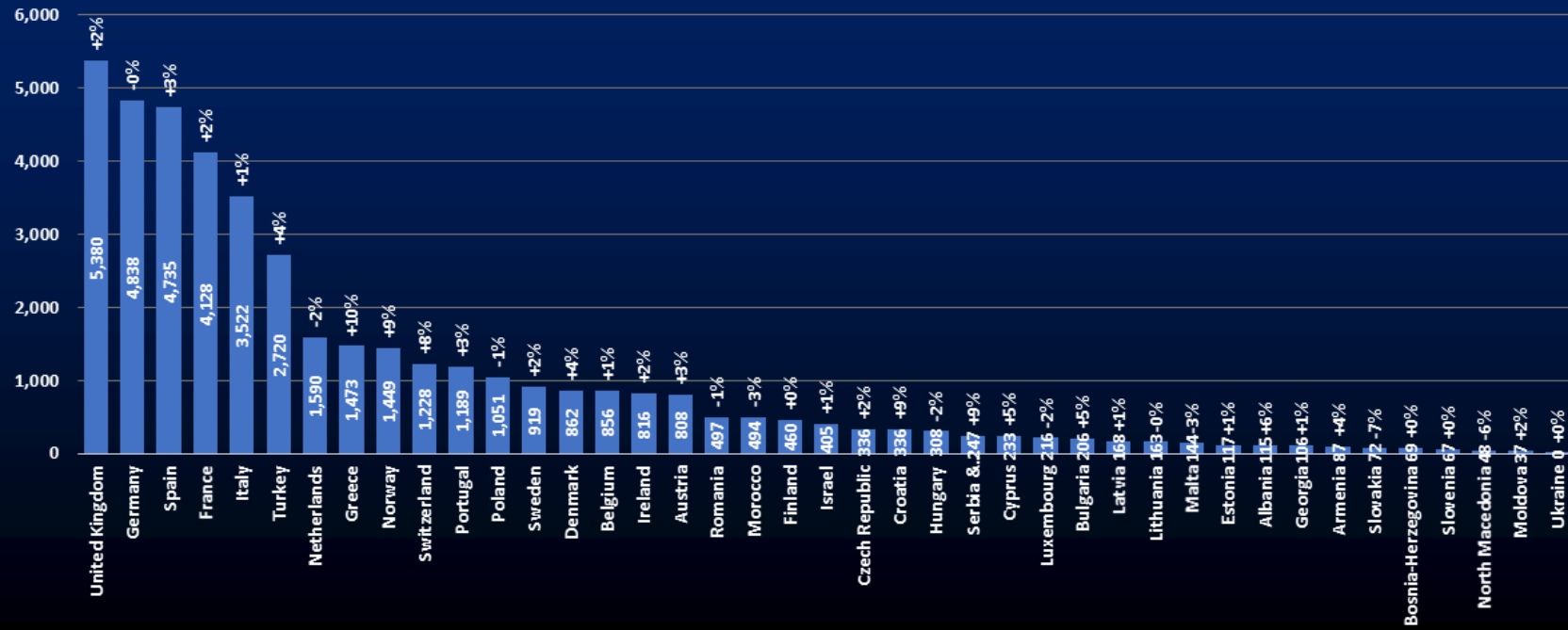
# States (Average Daily Departure/Arrival flights for the last week)

## Top 40



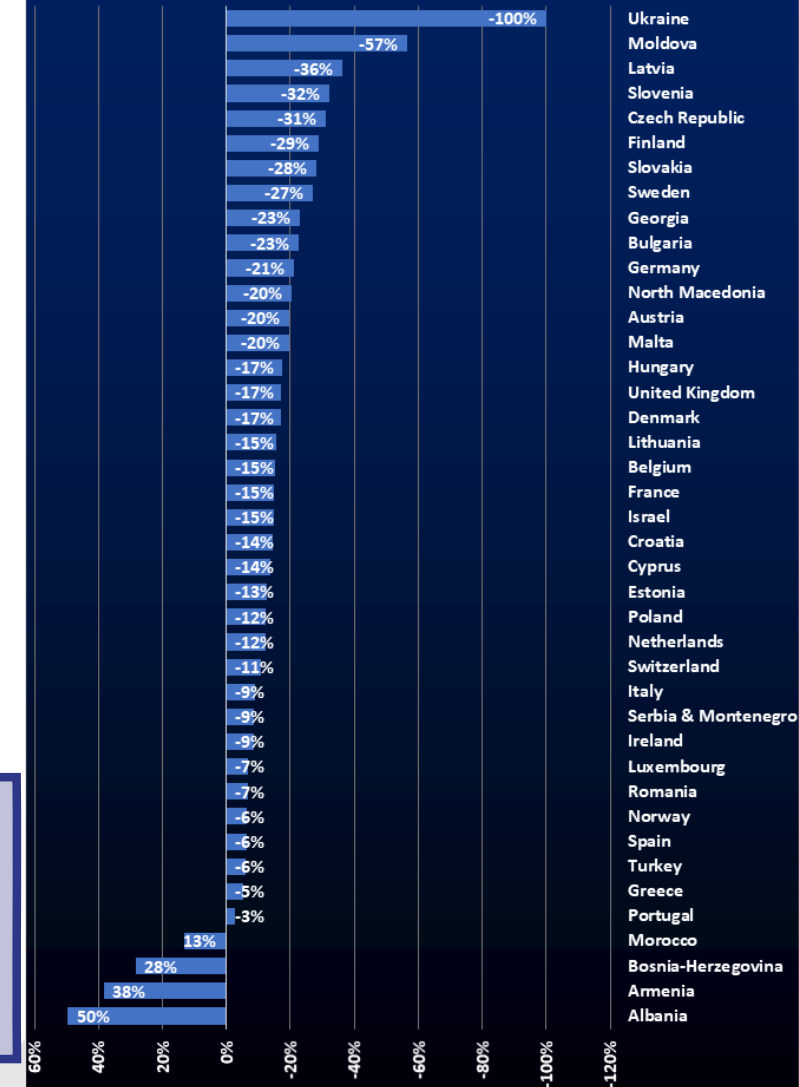
### States (Dep/Arr flights)

Average daily flights for week 18 - 24 May 2022 and comparison with previous week



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

IFR Dep/Arr Flights for Week 18 - 24 May 2022

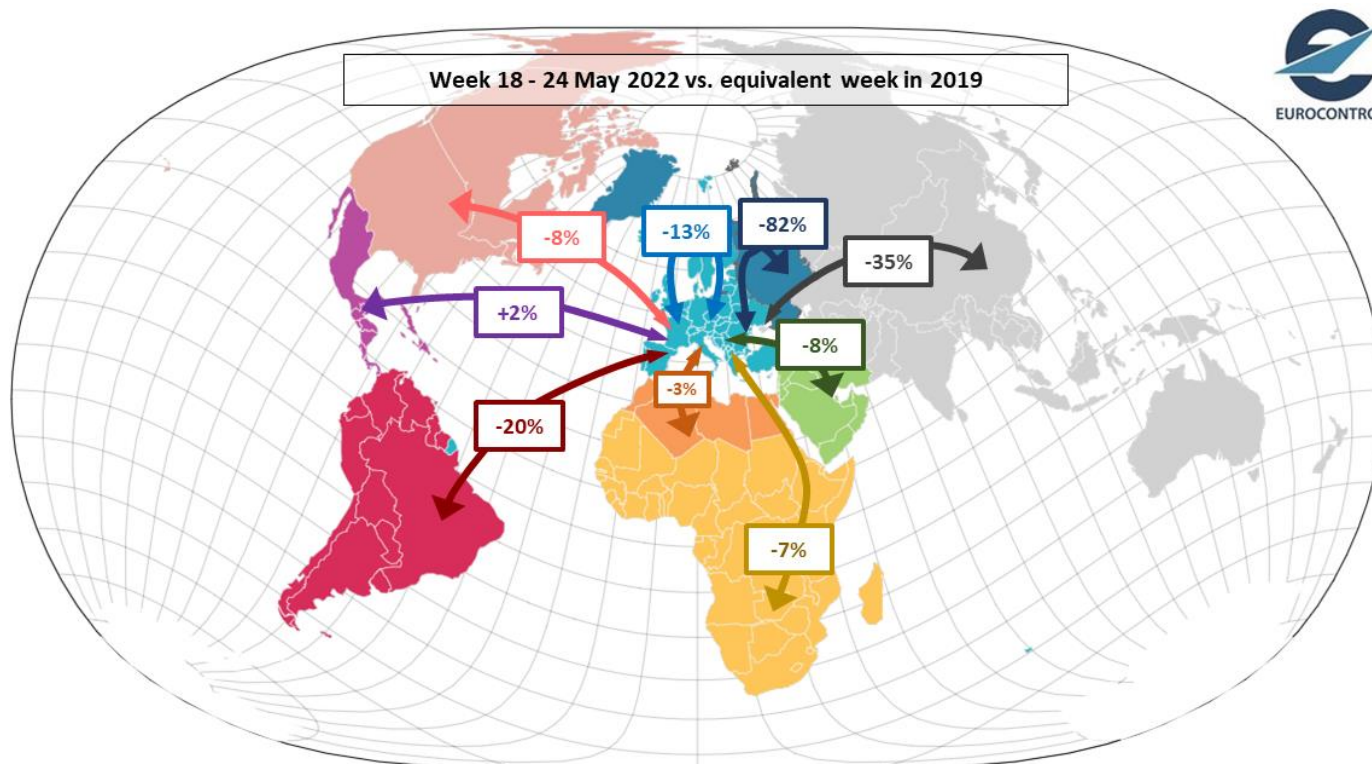


- ✦ Highest increases in flights vs previous week for **Spain (+3%)**, **Greece (+10%)**, **Norway (+9%)**, **Turkey (+4%)**, **France (+2%)**, **UK (+2%)**, **Switzerland (+8%)** and **Portugal (+3%)**.
- ✦ Highest decreases for **Netherlands (-2%)**, **Morocco (-3%)** and **Poland (-1%)**.
- ✦ Traffic levels ranging from **-100% (Ukraine)** to **+50% (Albania)**, compared to 2019.

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

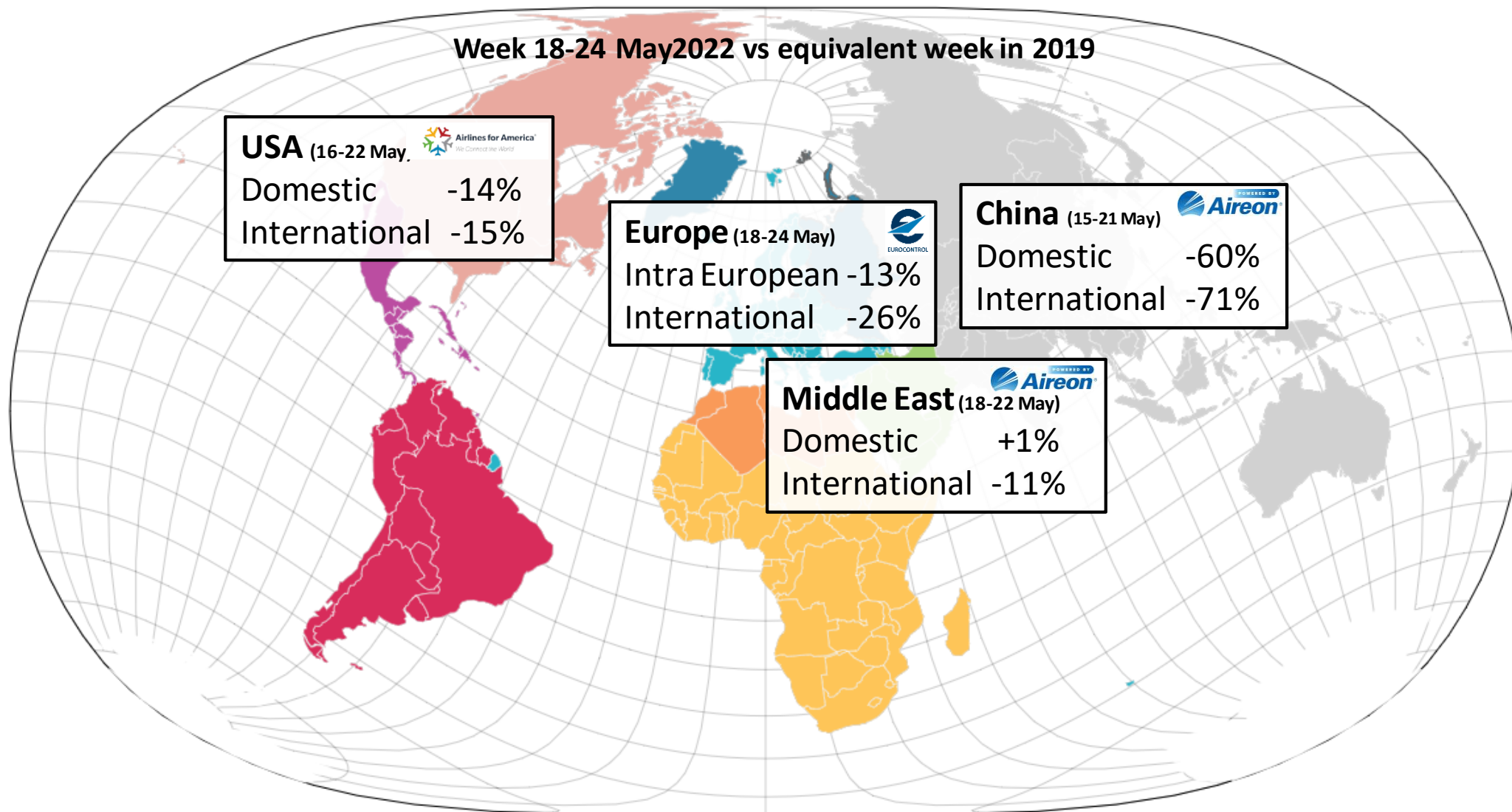


- ✘ The main traffic flow is the intra-Europe flow with 22,655 flights on average the most recent week, increasing by 2% over the previous week.
- ✘ Flows between Europe and Other Europe (incl. Russia) are at -82% compared to 2019.
- ✘ Important lockdown in China, owing to a surge in COVID-19 cases is affecting Chinese domestic flows (next slide).
- ✘ Intra-Europe flights are at -13% compared to 2019 while intercontinental flows are at -26%.



REGION (Average daily flights)	Week 11/05/2022 - 17/05/2022	Week 18/05/2022 - 24/05/2022	%	vs. 2019
<b>Intra-Europe</b>	<b>22,146</b>	<b>22,655</b>	<b>+2%</b>	<b>-13%</b>
Europe<->Asia/Pacific	497	513	+3%	-35%
Europe<->Mid-Atlantic	152	151	-1%	+2%
Europe<->Middle-East	1,120	1,112	-1%	-8%
Europe<->North Atlantic	1,181	1,219	+3%	-8%
Europe<->North-Africa	835	829	-1%	-3%
Europe<->Other Europe	205	217	+6%	-82%
Europe<->South-Atlantic	144	146	+1%	-20%
Europe<->Southern Africa	253	260	+3%	-7%
<b>Non Intra-Europe</b>	<b>4,387</b>	<b>4,446</b>	<b>+1%</b>	<b>-26%</b>

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





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



Top 20

## Top 20 Long Haul Airport-Pairs on week 18 - 24 May 2022



Rank evolution over prev. week	Airport-Pair	Avg daily flights	Δ vs prev. week	% vs prev. week	% vs 2019
→	London/Heathrow <-> New York JFK	38	→	+0	+0%
→	London/Heathrow <-> Los Angeles	18	→	+0	+2%
→	Paris/Charles-De-Gaulle <-> New York JFK	17	→	+0	+1%
→	London/Heathrow <-> Newark	16	→	-0	-1%
↗	London/Heathrow <-> Chicago O Hare Intl	14	→	+0	+3%
→	London/Heathrow <-> Dubai	14	→	+0	+0%
↘	London/Heathrow <-> Boston	14	→	-0	-1%
↗	Frankfurt <-> Seoul/Inchon INTL	13	↗	+1	+13%
↗	London/Heathrow <-> San Francisco	12	→	+0	+0%
↘	Madrid/Barajas <-> Bogota Intl/Eldorado	12	→	-0	-3%
↘	Frankfurt <-> Chicago O Hare Intl	12	→	-1	-5%
↗	Milan/Malpensa <-> New York JFK	11	→	+0	+3%
↘	Frankfurt <-> New York JFK	11	→	-0	-1%
→	London/Heathrow <-> Hamad INTL	10	→	+0	+1%
→	London/Heathrow <-> Dallas/Fort Worth	10	→	+0	+0%
→	London/Heathrow <-> Toronto Intl/L.B. PE	10	→	+0	+0%
→	Rome/Fiumicino <-> New York JFK	10	→	+0	+0%
→	Amsterdam <-> New York JFK	10	→	+0	+3%
↘	Madrid/Barajas <-> Mexico City	9	→	+0	+0%
↘	London/Heathrow <-> Washington	9	→	+0	+0%

Within the top 20, long-haul airport pairs, most flows remained stable on previous week. Slight changes over the last week for:

**Increase for:**

✘ Frankfurt – Seoul Incheon (+1 flights)

**Decrease for:**

✘ Frankfurt – Chicago O Hare (-1 flights)

# Country pairs (Average Daily flights for the last week)

## Top 10



Rank evolution over prev. week	Top 10 Country-Pair on week 18 - 24 May 2022				
	Country-Pair	Avg daily flights	Δ vs prev. week	% vs prev. week	% vs 2019
→	Spain <-> Spain	1,197	↗ +8	+1%	↘ -2%
→	France <-> France	1,049	↗ +10	+1%	↘ -18%
→	Italy <-> Italy	890	↗ +9	+1%	↗ +6%
↗	Norway <-> Norway	872	↗ +89	+11%	↗ +3%
↘	Turkey <-> Turkey	863	↗ +19	+2%	↘ -5%
↘	Spain <-> United Kingdom	853	↗ +27	+3%	↘ -13%
↘	United Kingdom <-> United Kingdom	837	↗ +22	+3%	↘ -20%
→	Germany <-> Germany	676	↘ -65	-9%	↘ -36%
→	Germany <-> Spain	571	↗ +36	+7%	↘ -6%
↗	France <-> Spain	380	↗ +24	+7%	↘ -3%

Seven of the top 10 flows are domestic.

✘ **Spain-Spain** is the country-pair with the highest number of dep/arr flights (1,197) followed by **France-France** (1,049), **Italy-Italy** (890), **Norway-Norway** (872), **Turkey-Turkey** (863), **Spain-UK** (853), **UK-UK** (837) and **Germany-Germany** (676).

✘ **Norway-Norway** and **France-Spain** ranks are higher this week compared with the previous week. **Turkey-Turkey**, **Spain-UK** and **UK-UK** lost a few ranks this week compared with the previous week.

Within the top 10, **all but one** flows posted an **increase** over the previous week for:

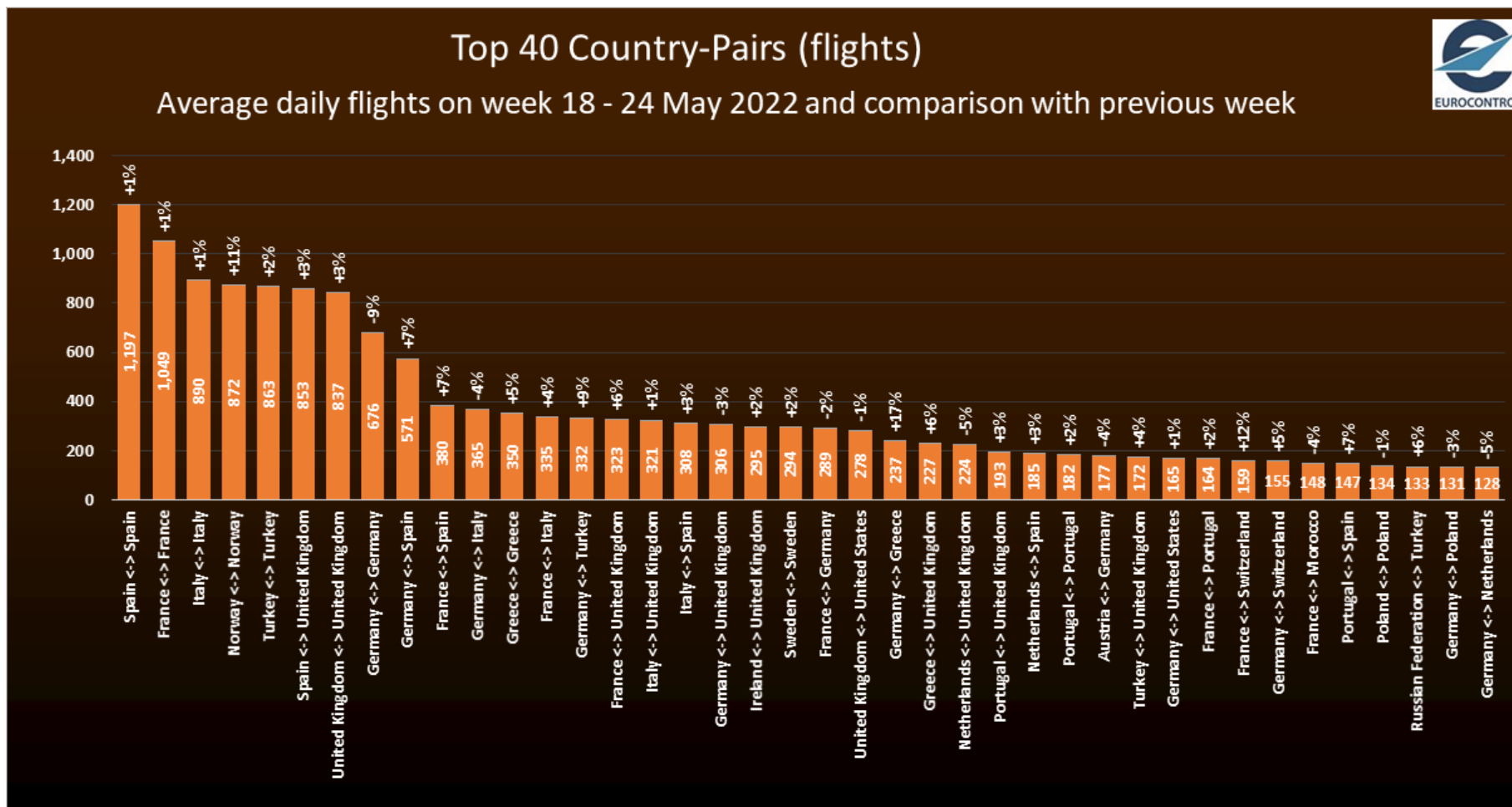
- ✘ **Norway-Norway** (+89 flights; +11%) mainly due to SAS, Wideroe and light AOs.
- ✘ **Germany-Spain** (+36 flights; +7%): mainly due to Condor, light AOs, Eurowings and Lufthansa.
- ✘ **Spain-UK** (+27 flights; +3%): mainly due to easyJet, BA, TUI and Jet2.com.
- ✘ **France-Spain** (+24 flights; +7%): mainly due to light AOs, Vistajet, NetJets and French Air Force.

Decreases for:

- ✘ **Germany-Germany** (-65 flights; -9%): mainly due to light AOs and Lufthansa.

# Country pairs (Average Daily flights for the last week)

Top 40



✘ Highest increase in flights vs previous week for **Norway-Norway (+11%)**, **Germany-Spain (+7%)**, **Germany-Greece (+17%)**, **Germany-Turkey (+9%)**, **Spain-UK (+3%)**, **France-Spain (+7%)**, **UK-UK (+3%)** and **Turkey-Turkey (+2%)**.

✘ Highest decrease in flights vs previous week for **Germany-Germany (-9%)**.

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



## Top 10

Rank evolution over prev. Week	Top 10 Airports on week 18 May - 24 May 2022				
	Airport	Average Daily Dep/Arr Flights	Δ over prev. week	% over prev. week	% vs 2019
→	Amsterdam	1,276	↓ -25	-2%	↓ -14%
↗	IGA Istanbul Airport	1,203	↗ +19	+2%	↗ +5%
↓	Paris/Charles-De-Gaulle	1,193	↗ +6	+0%	↓ -16%
→	Frankfurt	1,185	↗ +2	+0%	↓ -22%
→	London/Heathrow	1,147	↗ +2	+0%	↓ -16%
→	Madrid/Barajas	992	↗ +2	+0%	↓ -17%
↗	Barcelona	889	↗ +38	+4%	↓ -12%
↓	Munich	866	↓ -11	-1%	↓ -30%
→	Palma De Mallorca	784	↗ +27	+4%	↗ +2%
→	London/Gatwick	718	↗ +16	+2%	↓ -18%

✘ **Amsterdam** is the airport with the highest number of dep/arr flights (1,276) followed by **IGA Istanbul** (1,203), **Paris CDG** (1,193), **Frankfurt** (1,185) and **London Heathrow** (1,147).

✘ The rankings have increased for **Istanbul IGA** and **Barcelona** and decreased for **Paris CDG** and **Munich**.

Within the top 10, **eight** airports recorded **increases** over the previous week:

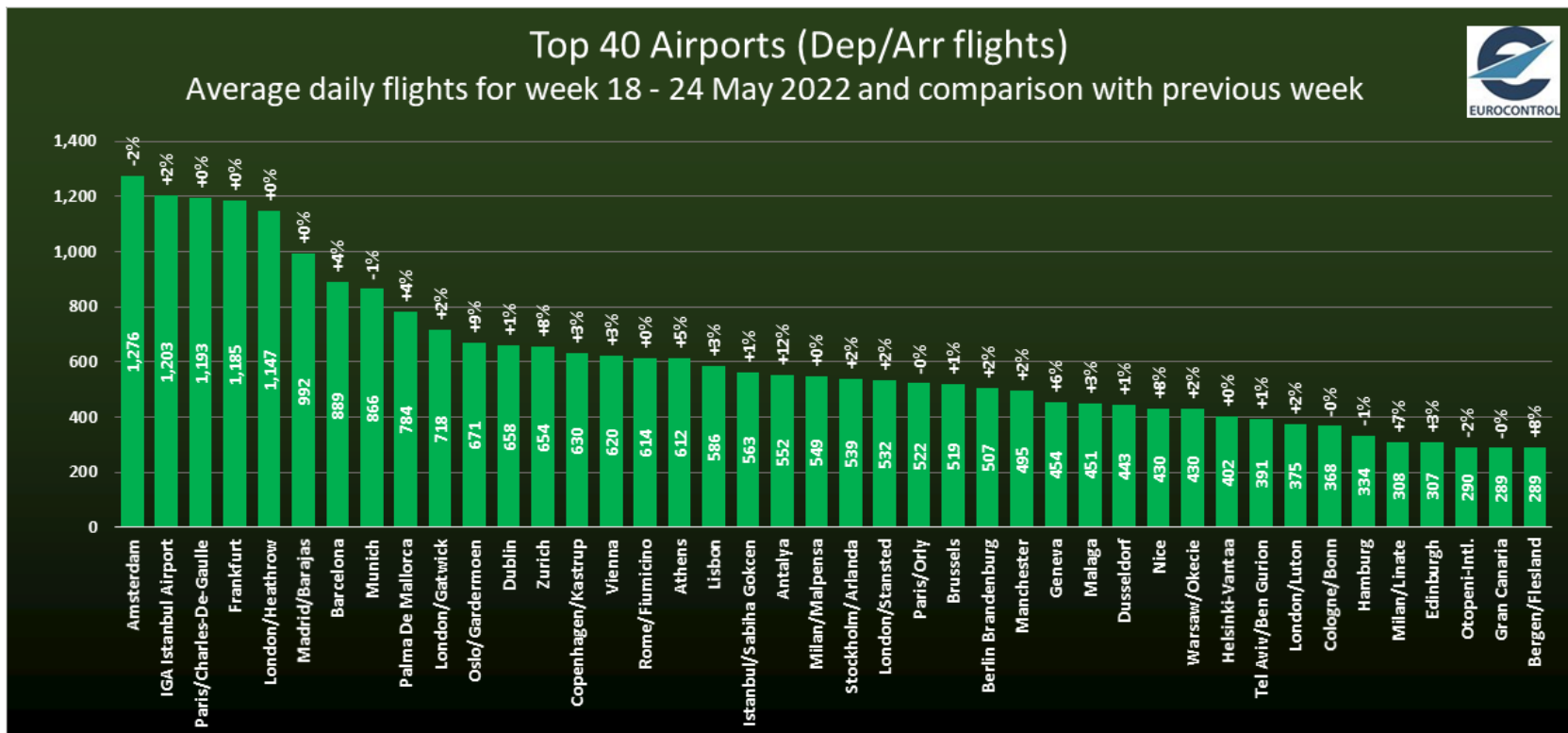
- ✘ **Barcelona** (+38 flights; +4%): mainly due to light AOs and easyJet. Mainly Italy, UK and domestic.
- ✘ **Palma de Mallorca** (+27 flights; +4%): Condor, Eurowings and TUI. Flows with Germany, France and domestic.
- ✘ **Istanbul IGA** (+19 flights; +2%): mainly due Turkish Airlines, Corendon and Egyptair. Domestic flows and flows with US, Iran and Italy.

Main decreases for:

- ✘ **Amsterdam** (-25 flights; -2%): KLM, and easyJet. Flows with UK, Germany and Italy.
- ✘ **Munich** (-11 flights; -1%): Lufthansa and Air Dolomiti. Mainly domestic flows and flows with Italy, UK and Belgium.

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

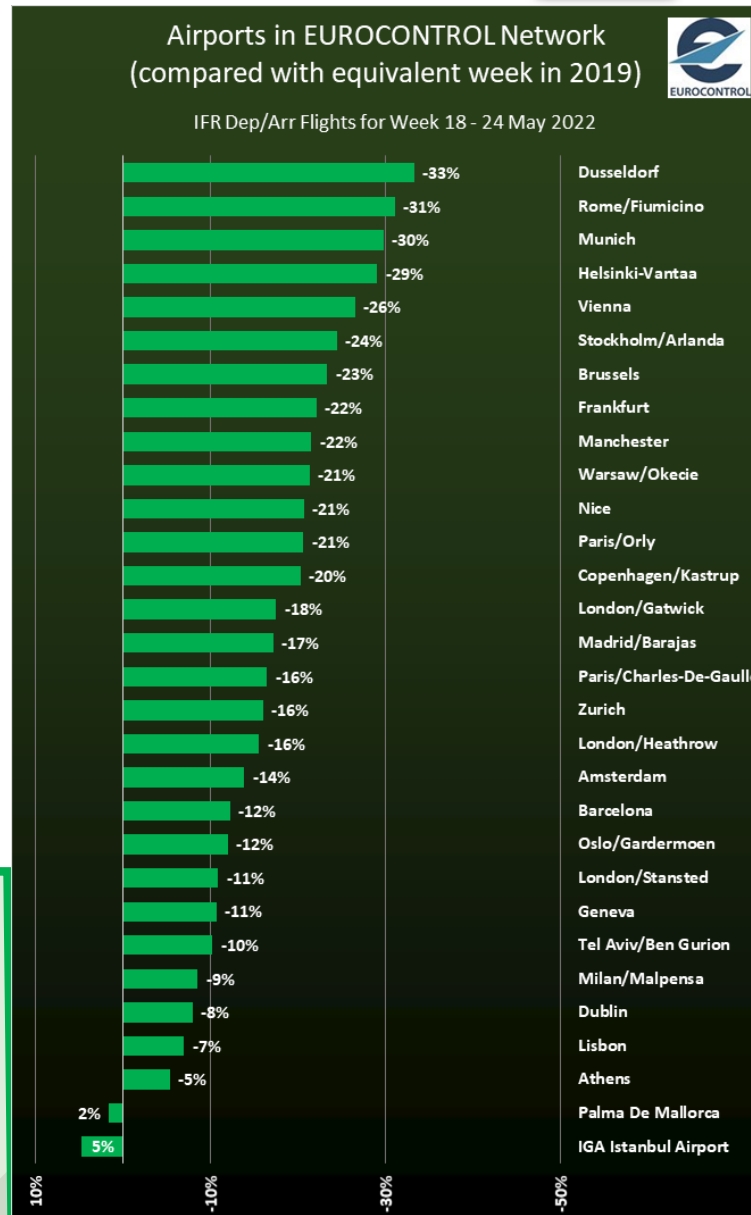
## Top 40



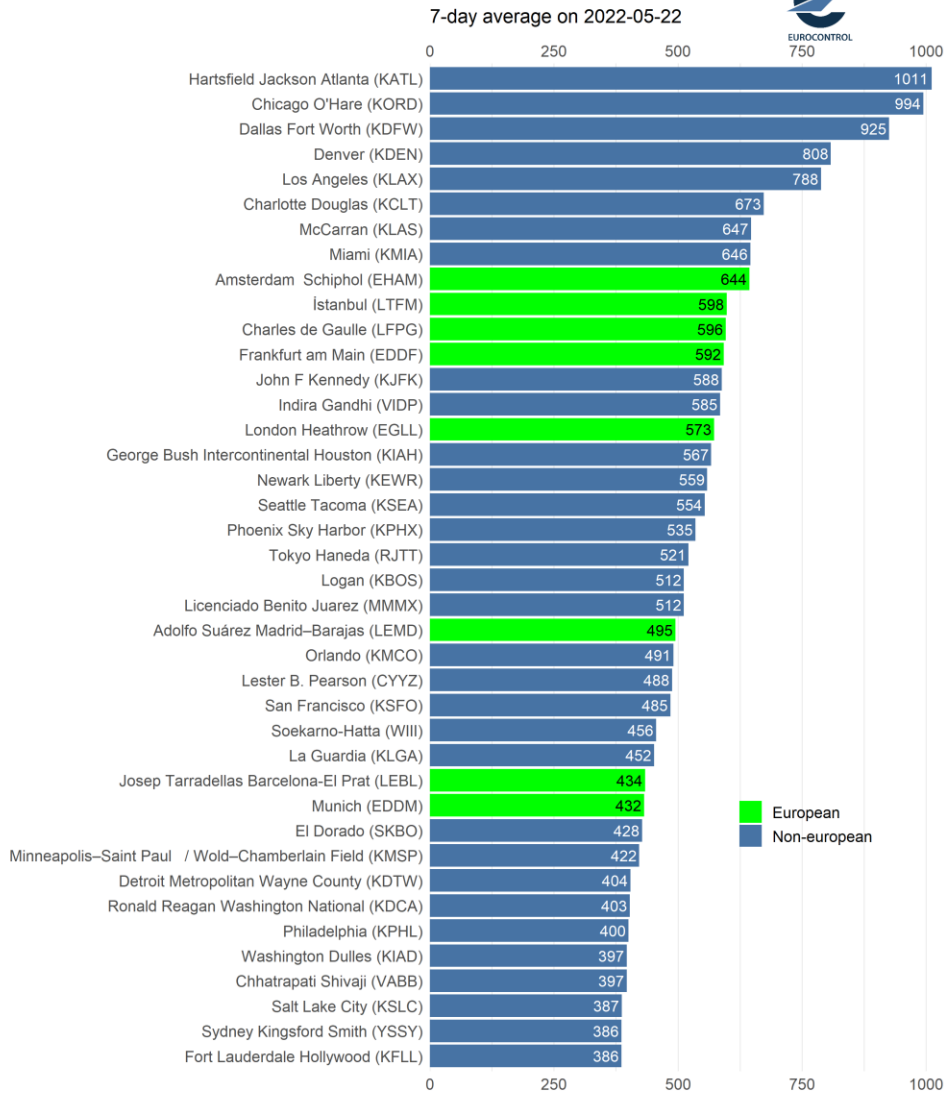
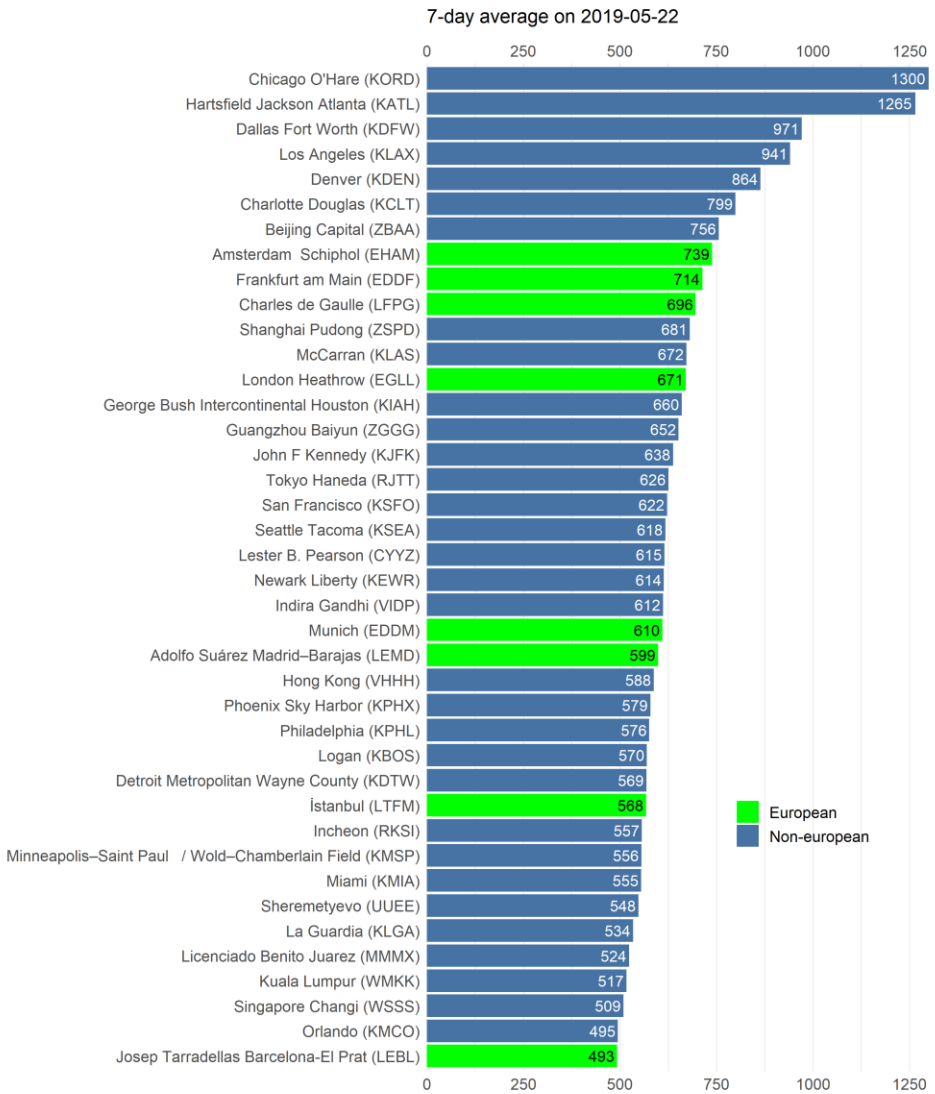
✦ Highest increases in flights vs the previous week for **Antalya (12%)**, **Oslo (+9%)**, **Zurich (+8%)**, **Barcelona (+4%)**, **Nice (+8%)**, **Athens (+5%)**, **Geneva (+6%)**, **Palma De Mallorca (+4%)**, **Copenhagen (+3%)** and **Milan Linate (+7%)**.

✦ Highest decreases for **Amsterdam (-2%)**, **Munich (-1%)** and **Bucharest (-2%)**.

✦ Traffic levels ranging from -33% (Dusseldorf) to +5% (Istanbul IGA), compared to 2019.



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



Source: Flightradar24 Historical Global Utilisation data

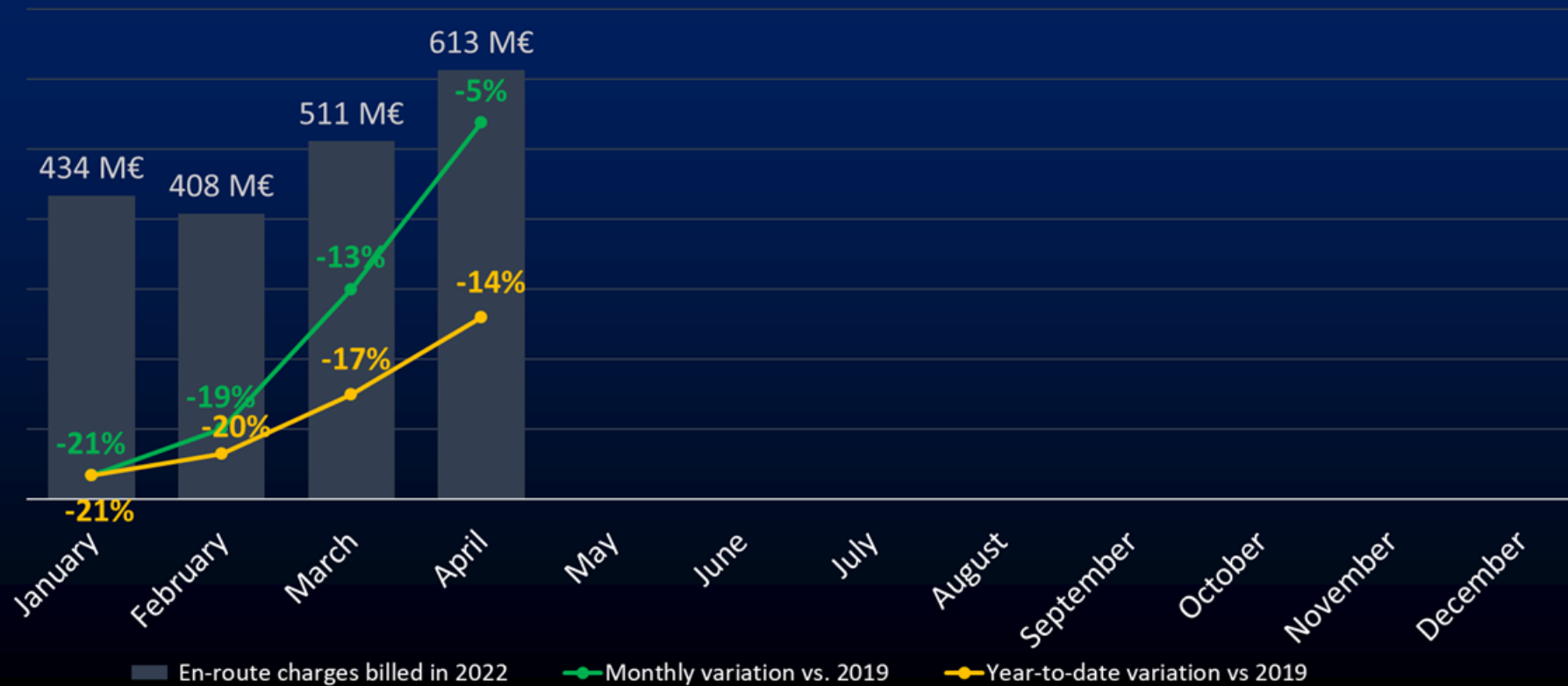
Comparing last week (right) with the same week in 2019 (left):

- ✘ **Eight European airports** are ranked in the **Top 40** global airports.
- ✘ **Two European airports** entered the **Top 10** (Amsterdam and Istanbul IGA).
- ✘ Paris CDG, Frankfurt and London Heathrow are in the **Top 15**.
- ✘ The **Top 8** global airports are currently **all based in the US**.
- ✘ The **first Asian airport in 2022** is **New Delhi (14<sup>th</sup>)**.

# En-Route Air Navigation charges



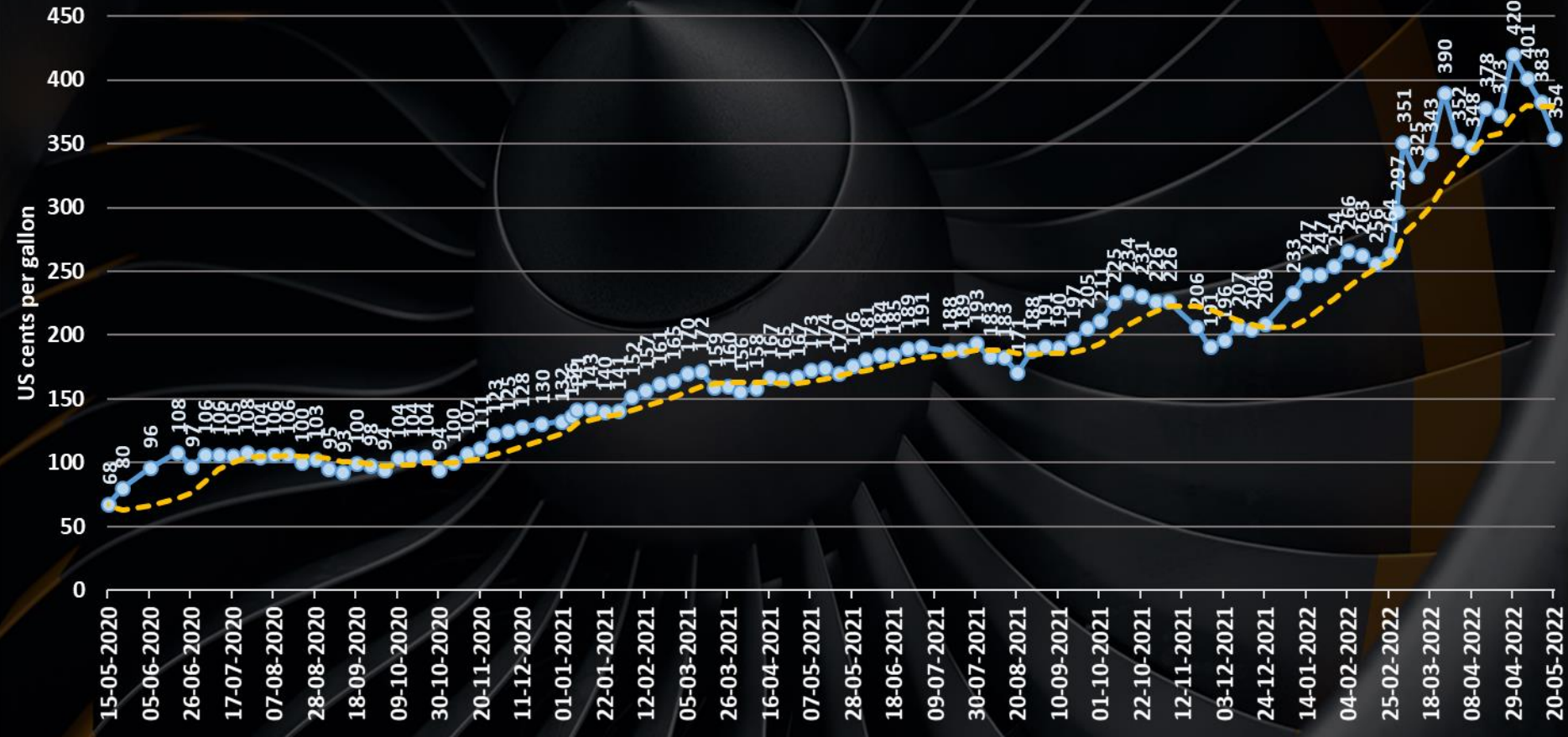
En-route air navigation charges for the EUROCONTROL Area (2022)  
Year-to-date amount billed: 1,967 M€ (-14% vs 2019)



- ✘ **EUROCONTROL** has billed **613M€** of en-route charges for April flights.
- ✘ This is **-5%** below the amount billed for the April 2019 flights.
- ✘ On a year-to-date basis, EUROCONTROL billed **1,967M€** which is **-14% vs 2019**



## Jet Fuel Price Europe



Source: IATA/Platts

✈️ **Jet fuel prices** decreased to 354 cts/gallon on 20 May (-12% vs two weeks ago, +52% vs early January).



To further assist you in your analysis, EUROCONTROL provides the following additional information on a daily basis (daily updates at 7:00 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](http://www.eurocontrol.int/Economics/DailyTrafficVariation) (or via the COVID-19 button on the top of our homepage [www.eurocontrol.int](http://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](mailto:aviation.intelligence@eurocontrol.int)



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