Supporting
European
Aviation

EUROCONTROL

Prévisions de vols pour l’Europe

Période 2022-2027

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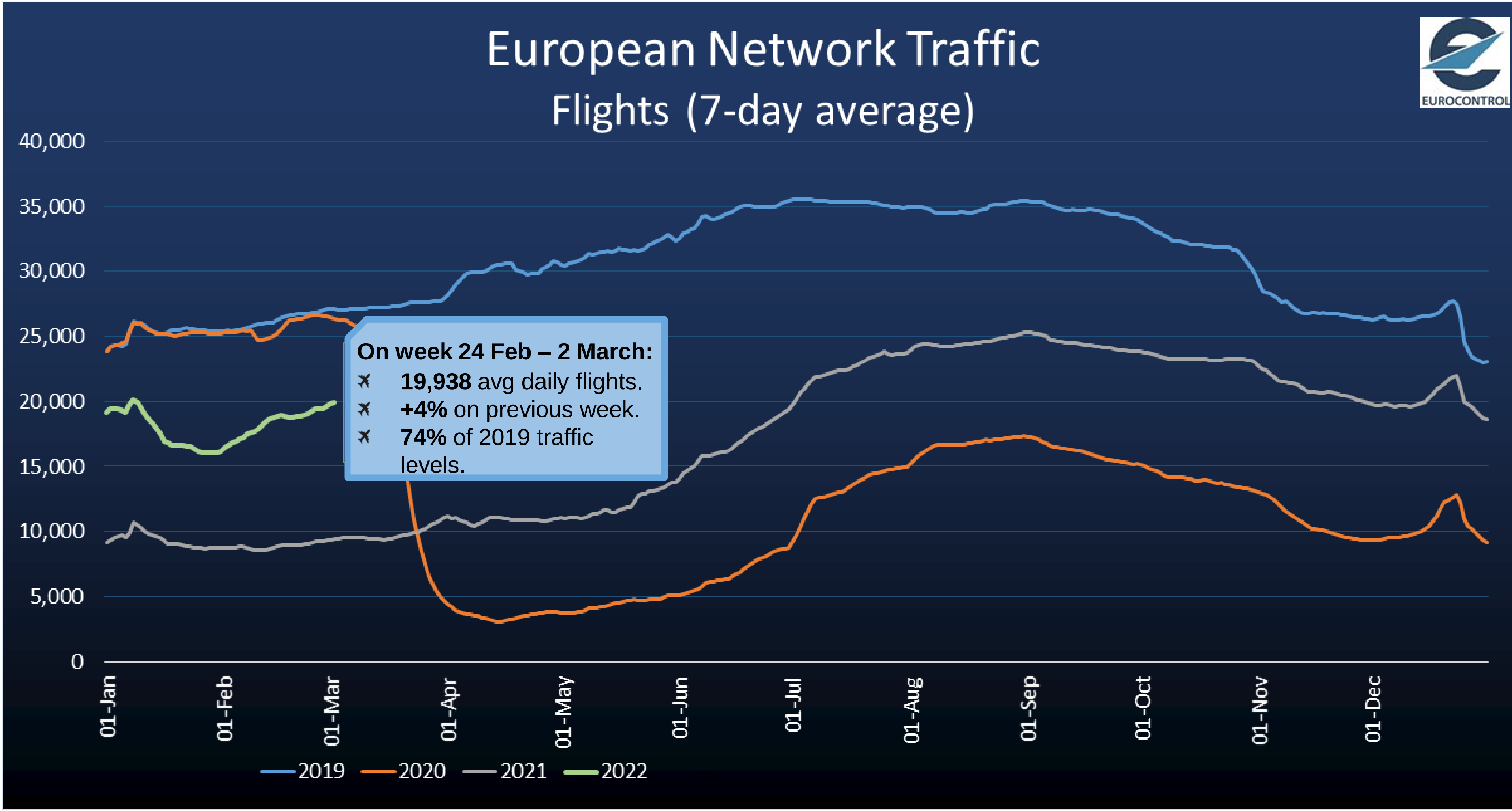
Overall traffic situation at EUROCONTROL level



Latest traffic situation at EUROCONTROL level

Recent trends (Week of 24 Feb – 2 Mar 2022)

- **19,938 daily flights** on average over past week, **increasing by 4% vs previous week**; 74% of 2019 levels.
- Dramatic developments in Russia and Ukraine due to military activities, leading to the closure of **Ukrainian airspace on Thu 24 Feb and ban of Russian airlines in Europe and European airlines in Russia**.
- **No traffic in Ukraine** and **almost no traffic in Moldova**.
- **Low-cost airlines** (Ryanair, easyJet) have been **adding capacity** to the network. States are relaxing travel restrictions after omicron spike.
- Domestic traffic vs 2019: Europe (-25%), USA (-11%), China (-21%) and Middle-East (-5%).
- **Jet fuel prices jumped to 297 cts/gallon** on 1 March, due to the Russian crisis (+13% over 4 days).
- Sharp increase of Business Aviation reaching +20% vs 2019. Charter (+21%), All-cargo (+4%).

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Top 10 Aircraft Operators

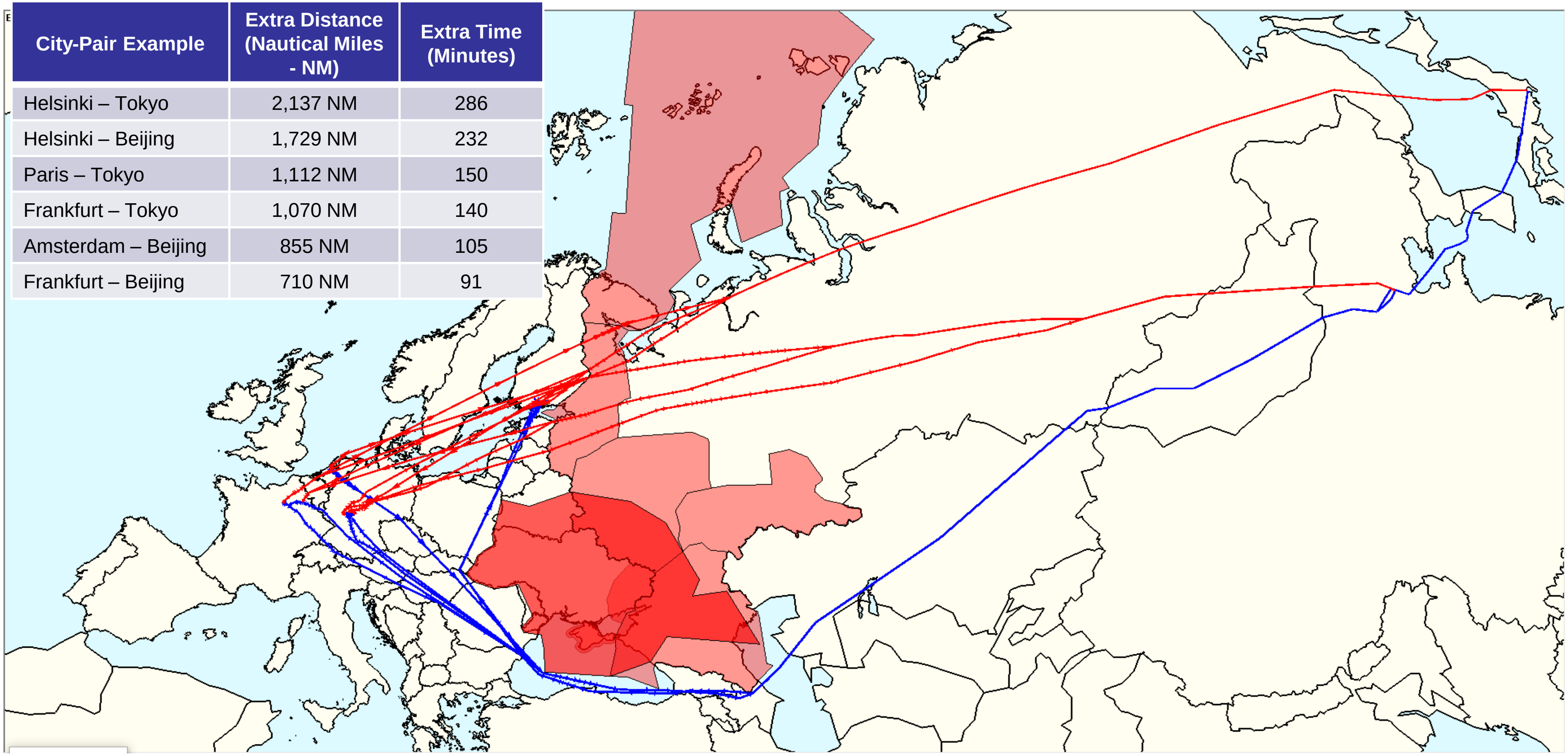
on Week 24 Feb - 02 Mar 2022 (avg daily flights)

1. Ryanair Group — Operated 1 959 flights; ↑2% vs same week in 2019; ↑0% vs prev week
2. easyJet Group — Operated 1 118 flights; ↓28% vs same week in 2019; ↑5% vs prev week
3. Turkish Airlines — Operated 1 001 flights; ↓21% vs same week in 2019; ↓1% vs prev week
4. Air France Group — Operated 830 flights; ↓28% vs same week in 2019; ↑4% vs prev week
5. Lufthansa Airlines — Operated 797 flights; ↓47% vs same week in 2019; ↑7% vs prev week
6. KLM Group — Operated 634 flights; ↓19% vs same week in 2019; ↑17% vs prev week
7. British Airways Grp — Operated 470 flights; ↓47% vs same week in 2019; ↑13% vs prev week
8. SAS Group — Operated 440 flights; ↓48% vs same week in 2019; ↑8% vs prev week
9. Wizz Air Group — Operated 356 flights; ↓24% vs same week in 2019; ↓7% vs prev week
10. Pegasus — Operated 327 flights; ↓23% vs same week in 2019; ↓2% vs prev week

Impact of Russian Airspace Closure on EU Operators – Sample Route/time extensions

The closure of Russian airspace to EU operators has a big impact – up to 5 hours extra flying time for a flight between Helsinki and Tokyo.

City-Pair Example	Extra Distance (Nautical Miles - NM)	Extra Time (Minutes)
Helsinki – Tokyo	2,137 NM	286
Helsinki – Beijing	1,729 NM	232
Paris – Tokyo	1,112 NM	150
Frankfurt – Tokyo	1,070 NM	140
Amsterdam – Beijing	855 NM	105
Frankfurt – Beijing	710 NM	91



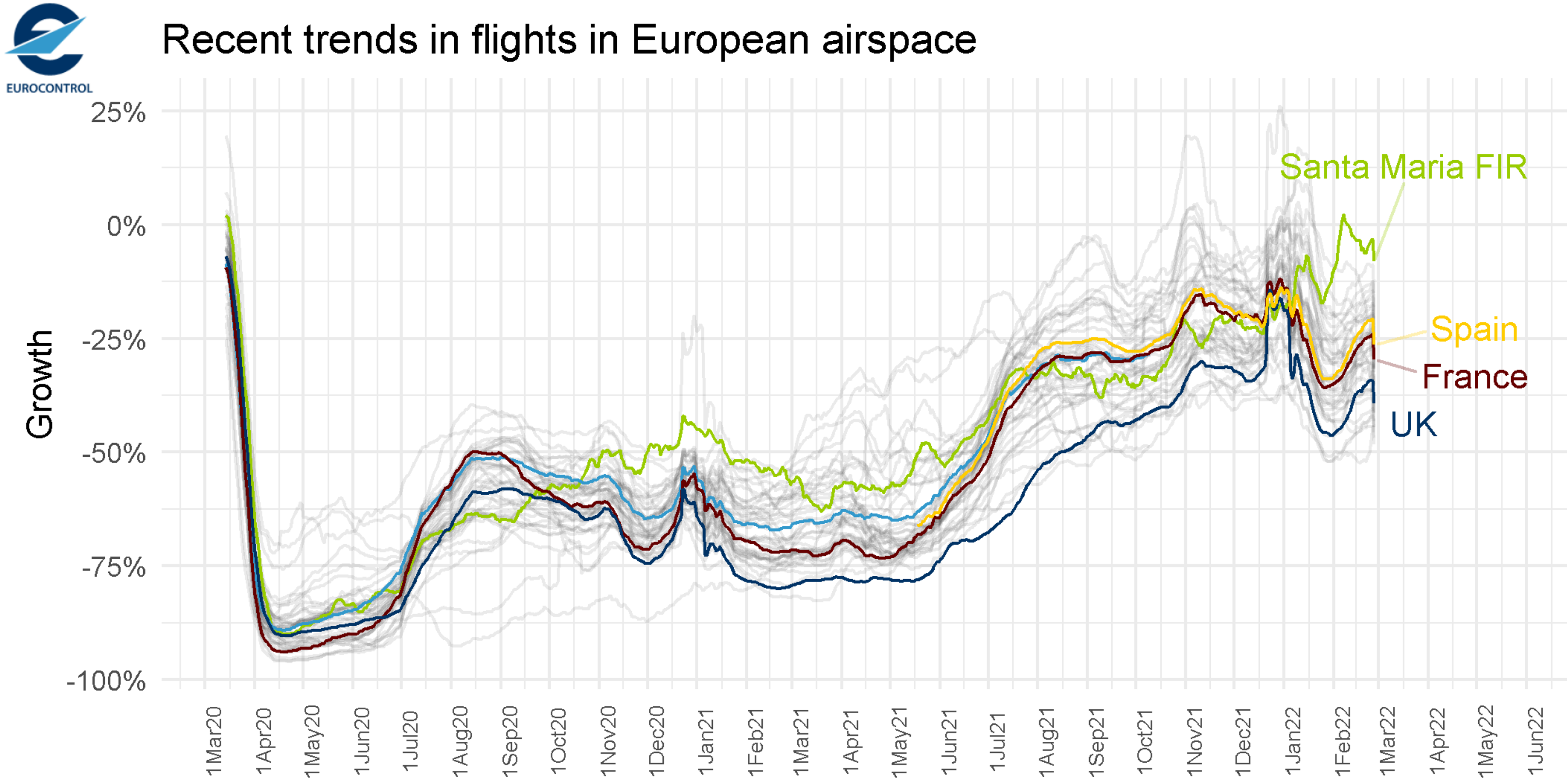
The October 2021 forecast is a 7-year forecast is covering the horizon 2021-2027

The October 2021 forecast took into account the following updated inputs:

- Traffic trends: Current traffic flows still strongly impacted by COVID-19.
- Economic growth: Latest revision of the economic forecast (Oxford Economics August 2021 release).
- Update of the existing three scenarios accounting for COVID-19 impact and timing of recovery.

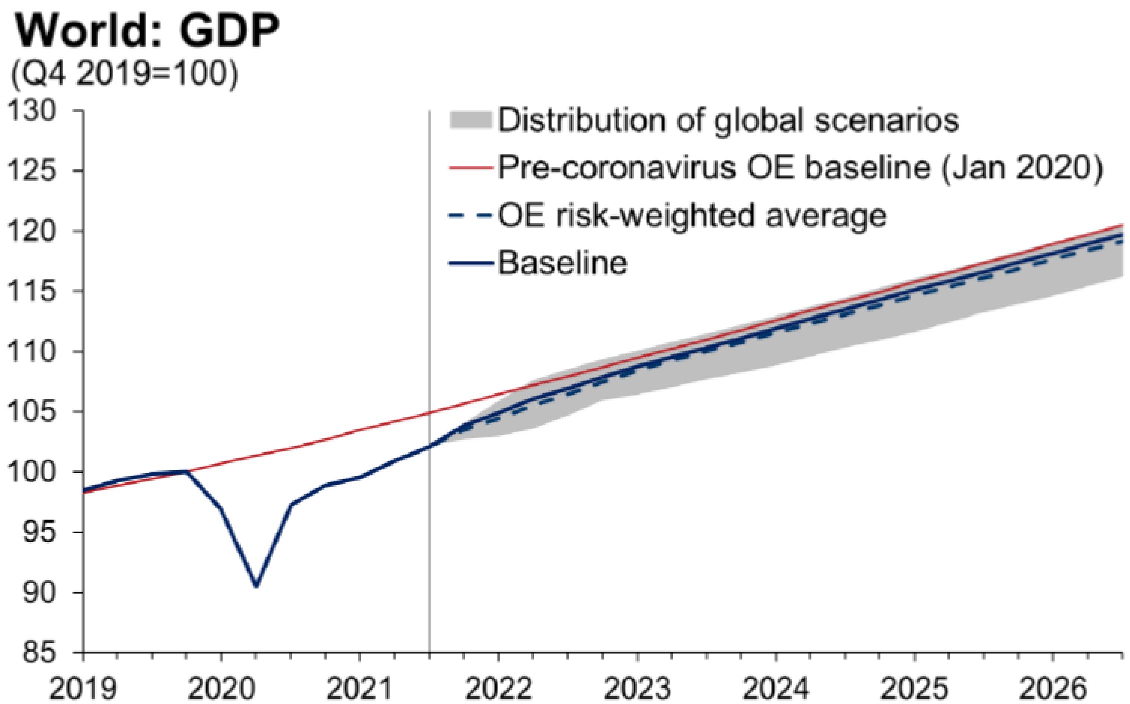
This forecast replaces the May 2021 forecast and covers 7 years.

Traffic trends: Since the beginning of 2021, there were 56% fewer flights than in 2019



Each line is a national airspace. Smoothing: 14 steps.

Macro-economic impact
Risk to the GDP forecast still lie to the downside



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Three scenarios are considered with greater or lesser long-term economic damage:

- **Consumer boom:** Consumer spending quickly their savings accumulated during the pandemic fueling a sharp consumer-led rebound in the global economy
- **Base scenario**
- **Return of inflation:** Deteriorating outlook for inflation with a sharp and sustained rise in bond yields

Macro-economic impact
Risk to the GDP forecast still lie to the downside

Scenario Update COVID-19 recovery

Drivers of the recovery during the forecast horizons

2020 | 2021 | 2022 | 2023 - …

Epidemiology

Vaccines roll-out
Vaccines effectiveness
Non-pharmaceutical interventions

Impact on aviation

Travel restriction
Coordinated approach
Recovery of long-haul
Consumer behaviour shifts by travel purpose (business travel, VFR, leisure)
Ability of airports to restart (supply-side)

Macro-economic impact

GDP

Scenario Update COVID-19 recovery
Optimistic and pessimistic scenarios are explored

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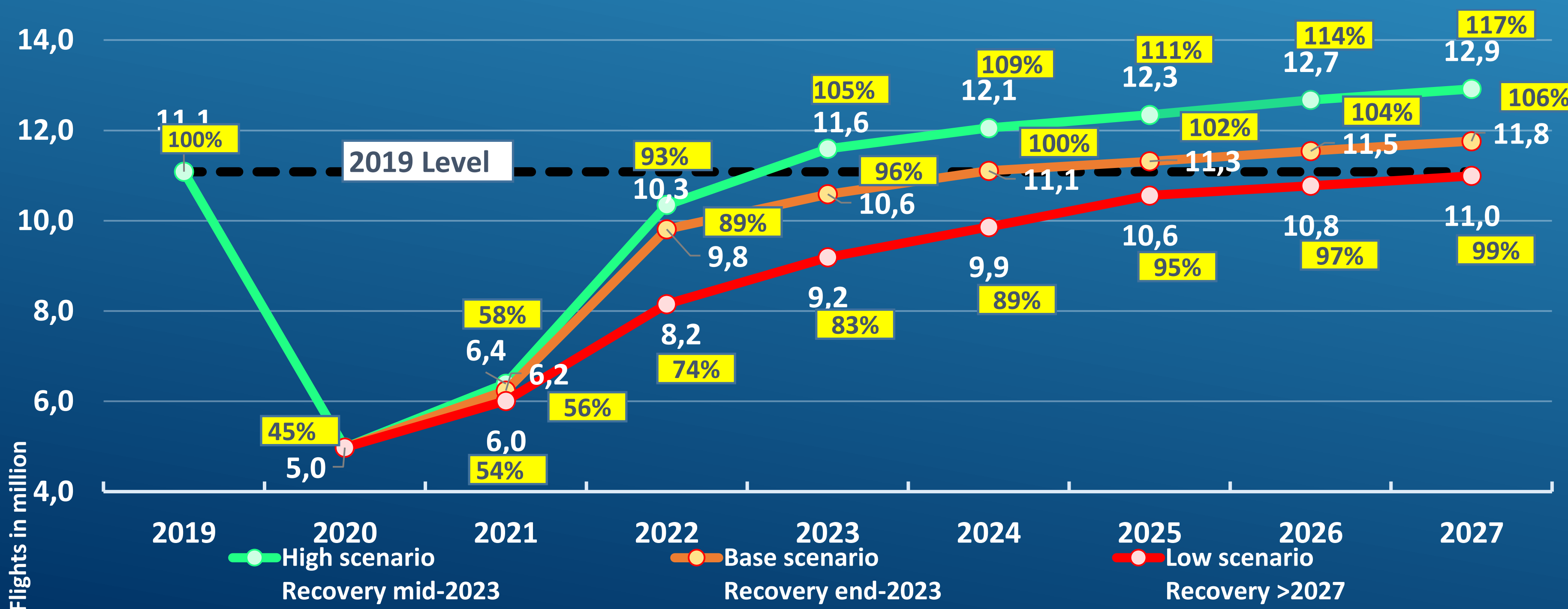
	High scenario	Baseline scenario	Low scenario
	Recovery to 2019 level in mid-2023	**Recovery to 2019 level by end 2023**	**Recovery to 2019 level after 2027**
Epidemiology	• Efficient vaccination campaign within Europe and globally • Reliable vaccine (also against variants) • Effective test-trace-isolate programme	• Vaccine roll-out reaching herd immunity levels within Europe • Reliable vaccine (also against variants) • Effective test-trace-isolate programme	• Patchy uptake of vaccine • Need of updated vaccines • Frequent reintroduction of lockdowns and mask mandates
Specific impact on aviation	• Less travel restriction • Coordinated interregional approach • North-Atlantic flows restarting during November 2021 • Asia-Pacific/India Q2 2022, Middle-East Q4 2021, Australia flows Q3 2022 • Good passenger confidence • Savings glut/Pent-up demand • Faster bounce-back of business travel • Airports well able to bring back capacity	• Limited travel restriction • Coordinated European approach • North-Atlantic flows restarting during November 2021 • Asia-Pacific/India Q3 2022, Middle-East Q1 2022, Australia flows Q4 2022 • Relatively good passenger confidence • Savings glut/Pent-up demand • Business travel return to pre-COVID19 levels in 2023 • Airports well able to bring back capacity	• Strong travel restriction • Coordinated European approach • Long-haul flows restarting as of end 2022 • Demand is bouncing back for 60-70% of travelers but reluctance to fly for rest; Permanent drop in propensity to fly; Growing environmental constraint • Airport difficulties to operate as pre-

EUROCONTROL STATFOR 7-year forecast for *Europe 2021-2027

Actual and future IFR movements, % traffic compared to 2019

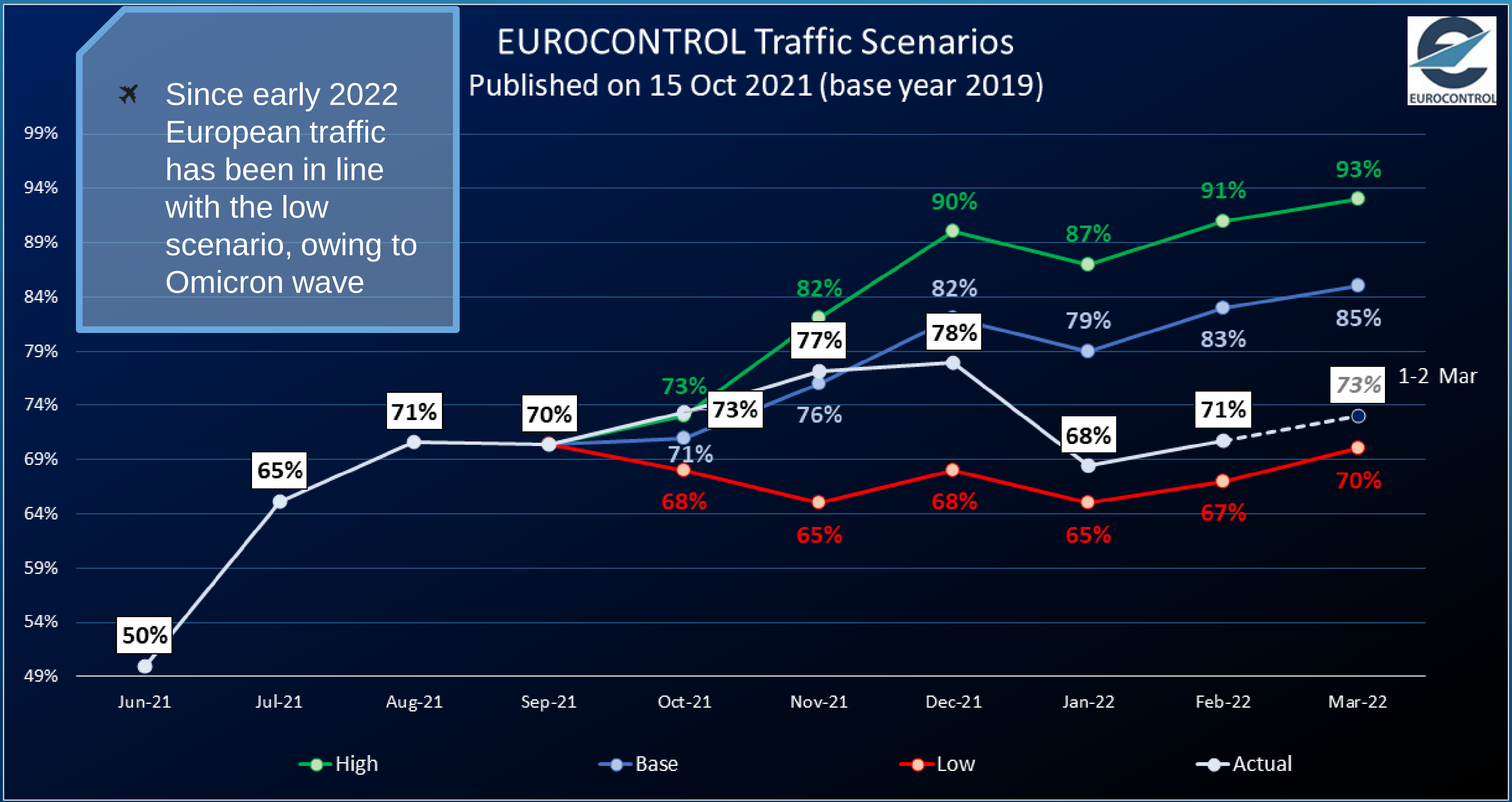
Europe



* Europe = ECAC 44 Member States
Source: EUROCONTROL, 7-year Forecast October 2021

Current situation compared to the latest EUROCONTROL traffic scenarios

- Since early 2022 European traffic has been in line with the low scenario, owing to Omicron wave



Additional Risks

- The **economic recovery** remains fragile. Current forecast includes different economic forecasts (High: Consumer Boom, Base: Baseline, Low: Return of inflation) but a further deterioration of the economic situation (eg financial crisis) is a downside risk.
- The **volatility in oil and fuel prices**: A surge in oil prices could lead in an increase of fuel cost, hence an increase of the ticket prices which is a downside risk.
- Future **airspace and network changes** (e.g. unexpected closures, new routes) and **airlines' changing choice of routes** are not modelled by the forecast.*
- The risk behind **Brexit**: We have assumed that continued transport connectivity will be ensured. Businesses and individuals operating in the UK should therefore see no change to existing conditions after the transition period.
- **Terrorist attacks**, **bans of one country on another one**, **wars and natural disasters**. These are impossible to predict. Their impact on air traffic could however be a temporary one, or more significant.

To further assist you in your analysis, EUROCONTROL provides the following additional information:

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. **Read the latest forecast publication (Oct. 2021):**
   7-year forecast Update (Oct. 2021)
3. **Check the forecast details per State (Oct. 2021):**
   Annex - Detailed Traffic Forecast

4. **Connect to the STATFOR Dashboard:**
   Monthly statistics at State, Airport, Flow,…levels, as well as forecast details
   STATFOR Interactive Dashboard

For more information please contact aviation.intelligence@eurocontrol.int