

Supporting
European
Aviation



Prévisions de vols pour l'Europe

Période 2022-2027

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4 Mars 2022



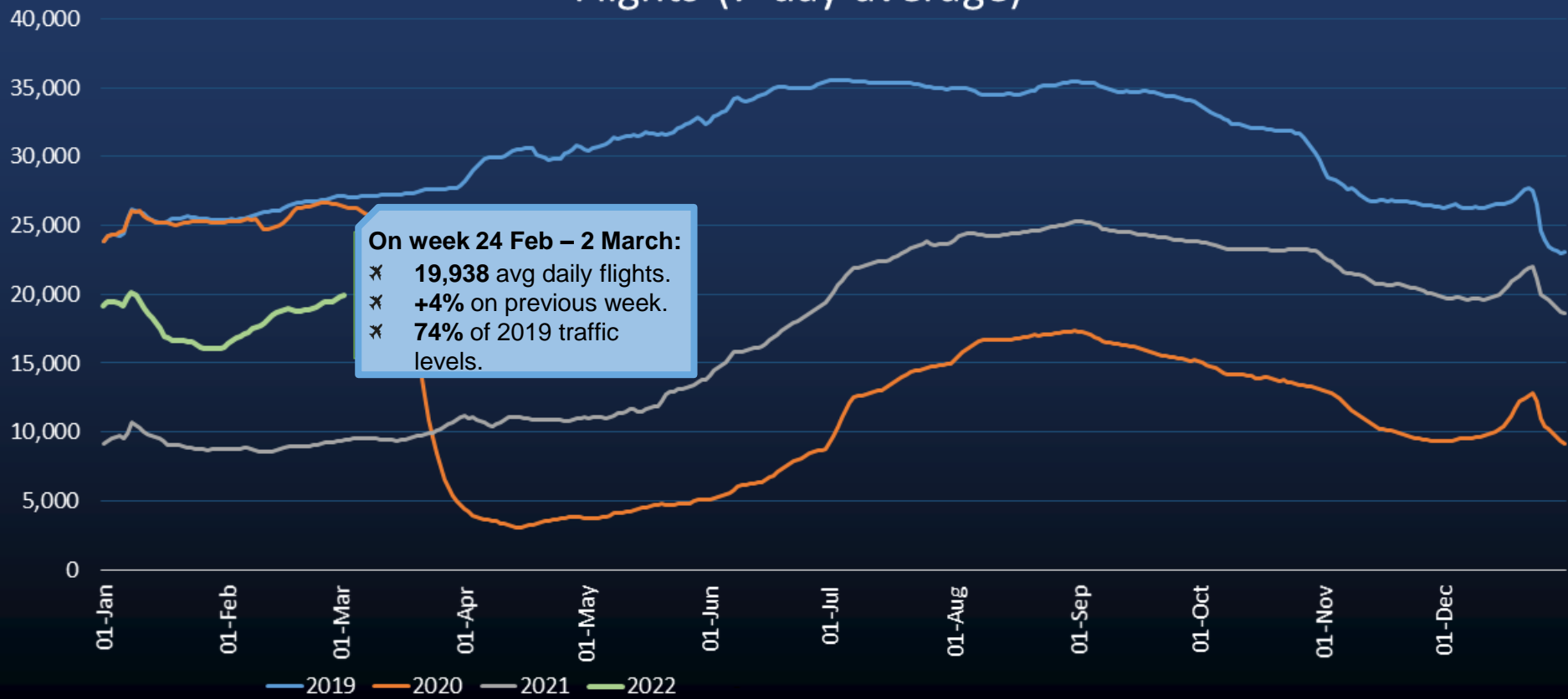
NETWORK
MANAGER



Overall traffic situation at EUROCONTROL level



European Network Traffic Flights (7-day average)



Latest traffic situation at EUROCONTROL level

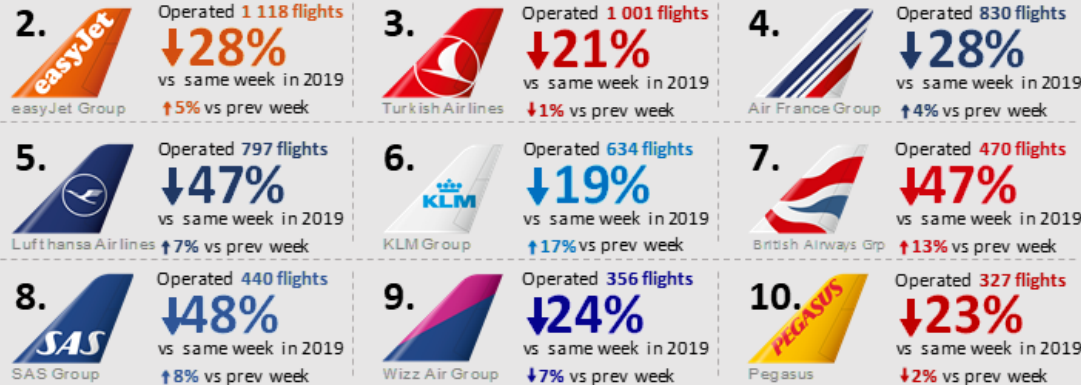


Recent trends (Week of 24 Feb – 2 Mar 2022)

- 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%).

Top 10 Aircraft Operators

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



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

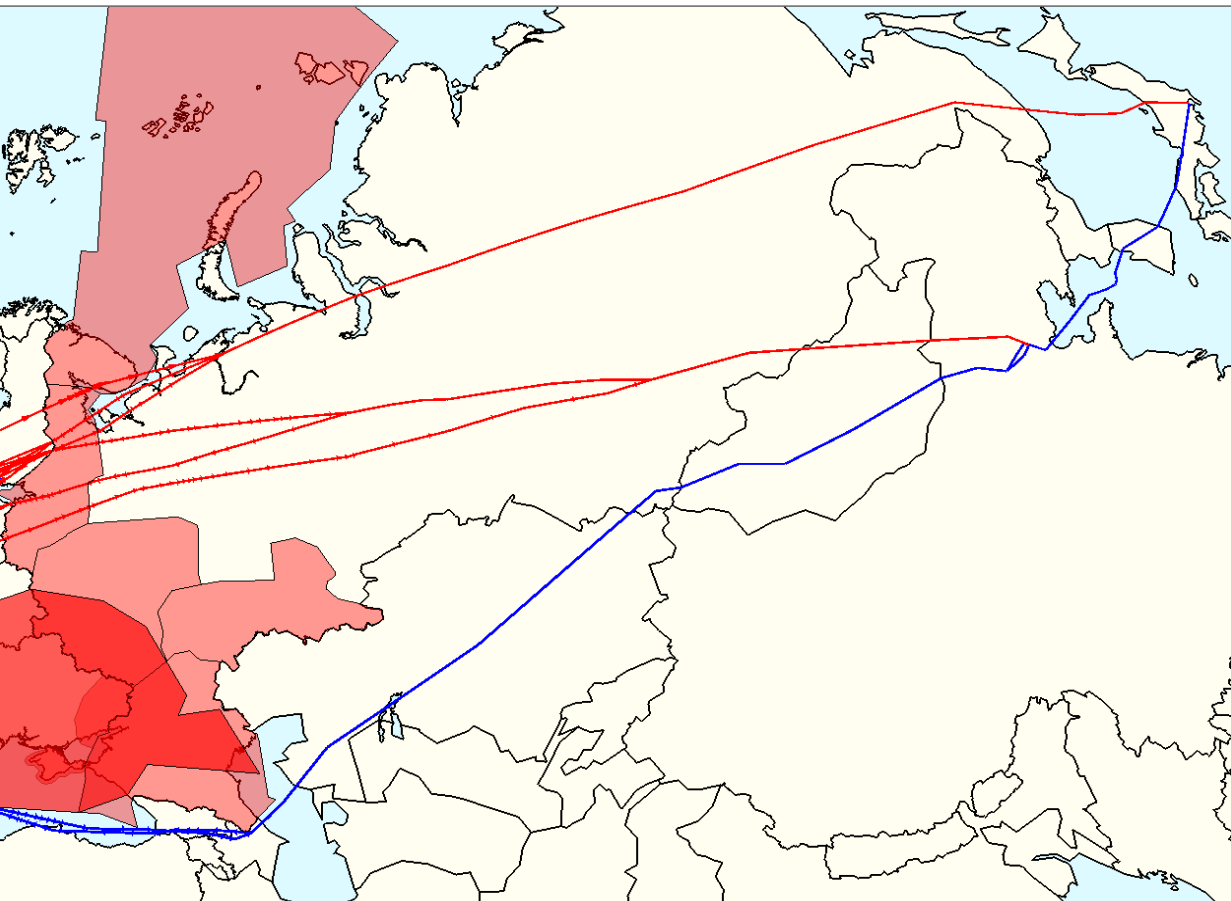
IFR Dep/Arr Flights for Week 24 Feb - 02 Mar 2022



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.

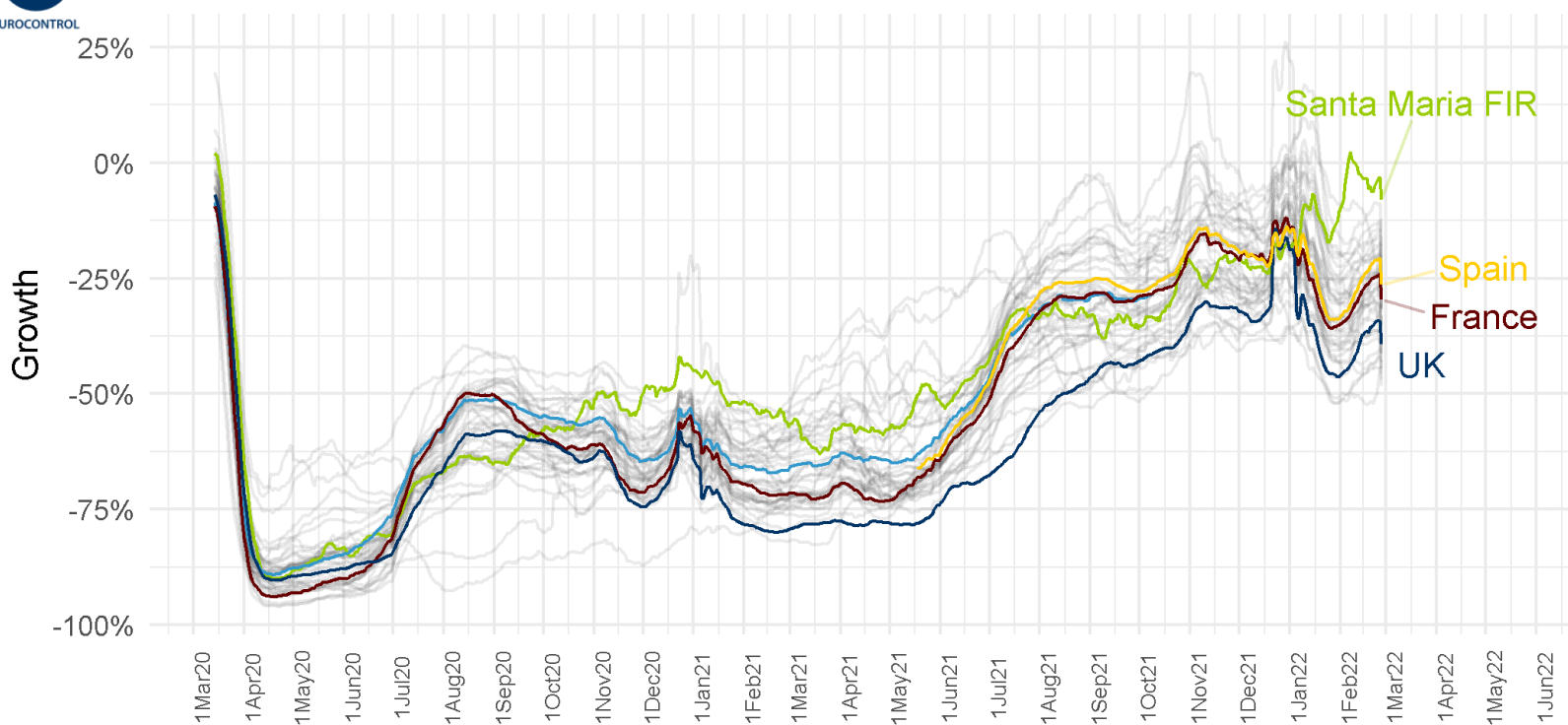
Traffic trends:



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



Recent trends in flights in European airspace



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

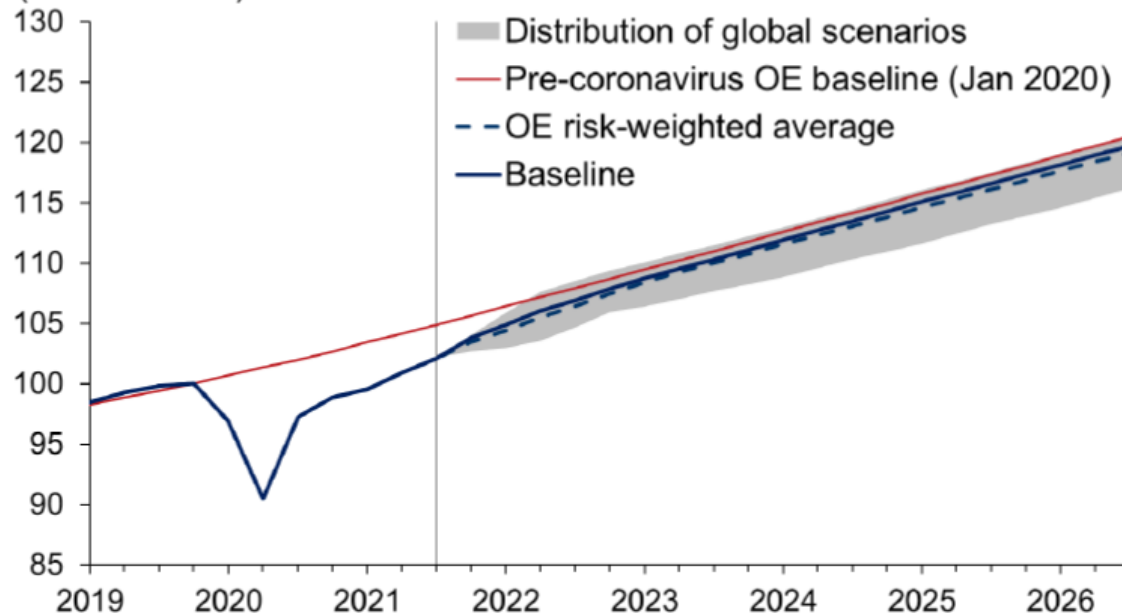


Macro-economic impact

Risk to the GDP forecast still lie to the downside

World: GDP

(Q4 2019=100)



Source : Oxford Economics/Haver Analytics

Document Confidentiality Classification: White

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



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

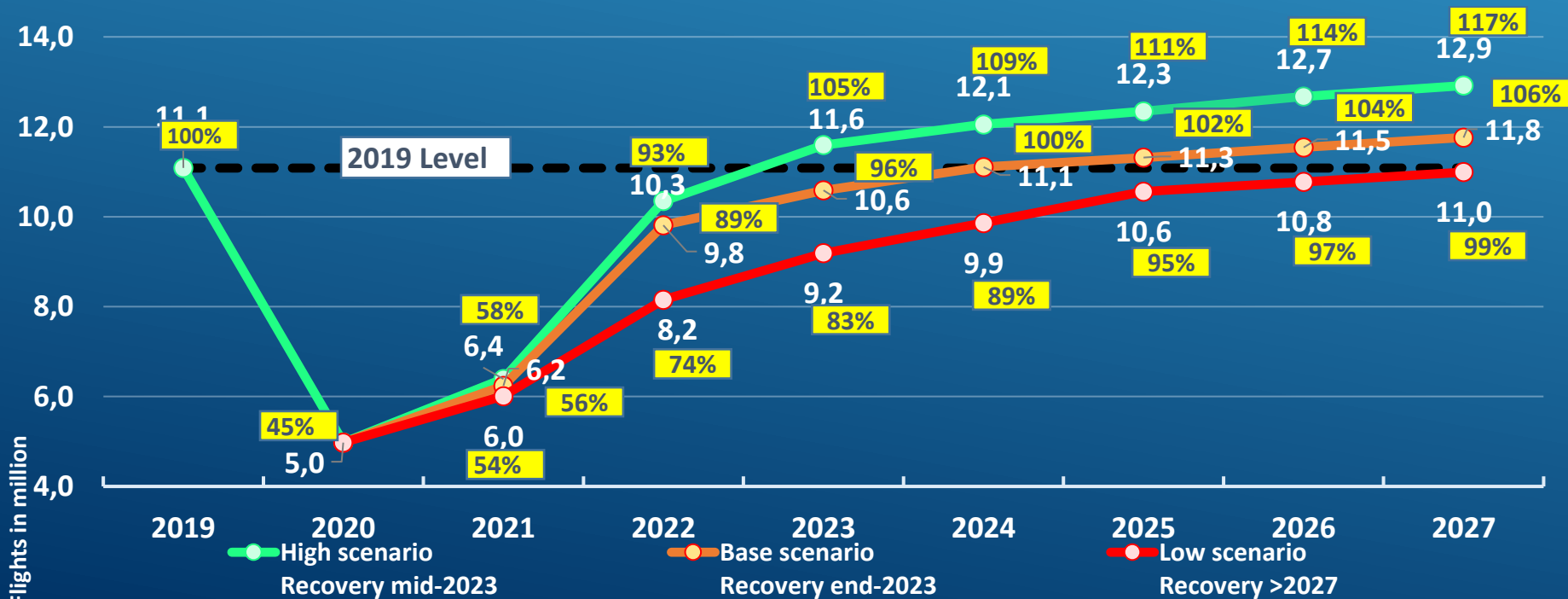
Optimistic and pessimistic scenarios are explored

	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	<ul style="list-style-type: none"> • Efficient vaccination campaign within Europe and globally • Reliable vaccine (also against variants) • Effective test-trace-isolate programme 	<ul style="list-style-type: none"> • Vaccine roll-out reaching herd immunity levels within Europe • Reliable vaccine (also against variants) • Effective test-trace-isolate programme 	<ul style="list-style-type: none"> • Patchy uptake of vaccine • Need of updated vaccines • Frequent reintroduction of lockdowns and mask mandates
Specific impact on aviation	<ul style="list-style-type: none"> • 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 	<ul style="list-style-type: none"> • 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 	<ul style="list-style-type: none"> • 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

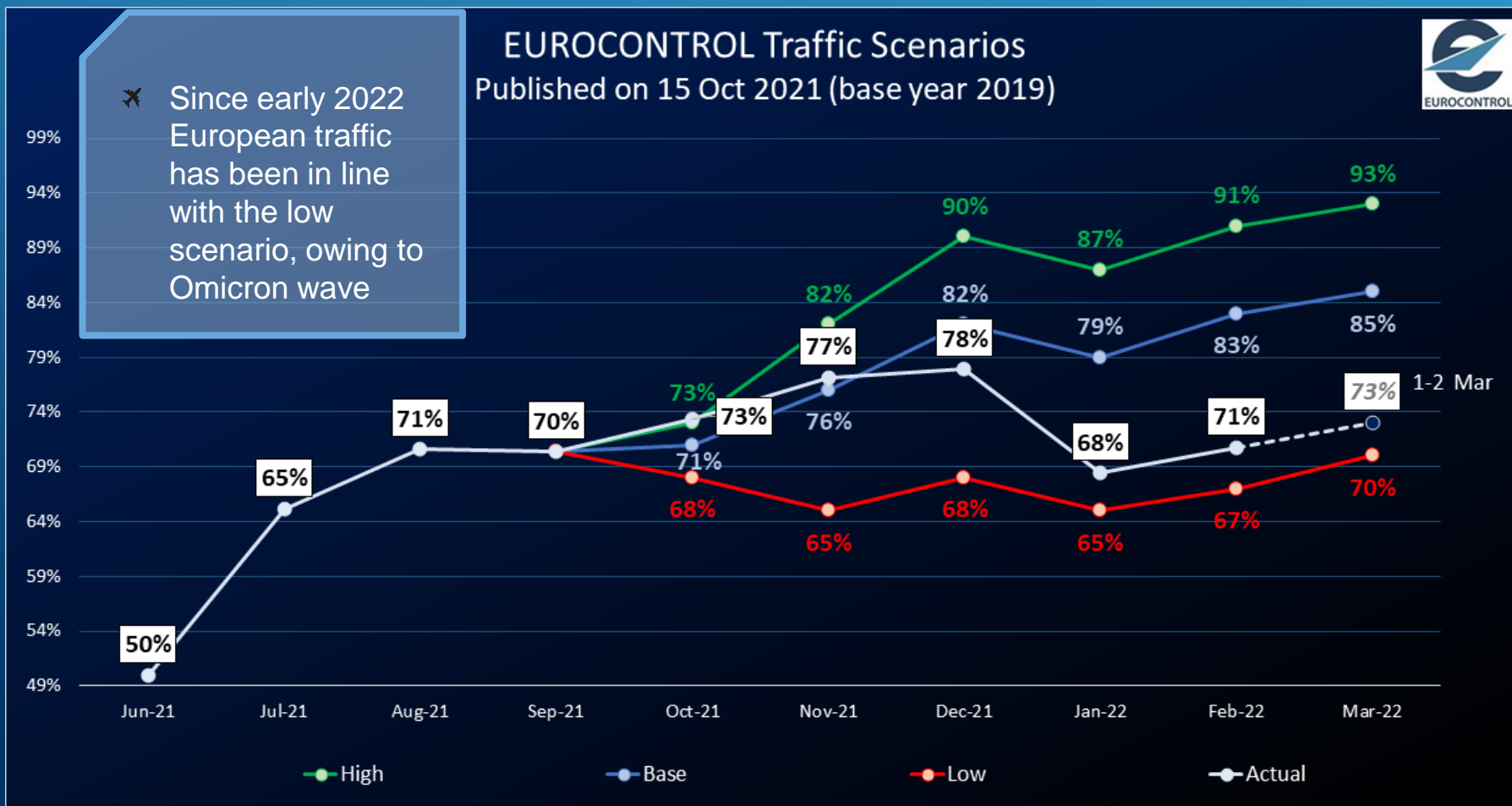
Actual and future IFR movements, % traffic compared to 2019

Europe








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

Current situation compared to the latest EUROCONTROL traffic scenarios



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



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