COVID19 Impact on European Air Traffic
EUROCONTROL Comprehensive Assessment

EUROCONTROL

Thursday, 7 January 2021

HEADLINES:

- 9,877 flights on 6 January - Traffic at 38% of 2019
- After the increase over Christmas for most Aircraft Operators and all Market Segments, traffic is back to early December levels.
- 7-day rolling average at -63.3% of 2019
- Decrease in almost all States (-3,040 flights (-24%) compared to 2 weeks ago (23 Dec))

Traffic Situation & Airlines Recovery

- **Over the first 6 days of January,** traffic is -60% compared to the same period in 2019, close to the scenario published by EUROCONTROL in September 2020. However, it is expected to decrease due to the renewed lockdown across many European countries.
- **General decrease of capacity for most airlines** including low cost carriers.
- **Turkish Airlines** was the airline with the highest number of flights with 581 flights on Wed 6 January slightly increasing by +4% compared to Wed 23 December (+20 flights), followed by **Air France** (432 flights, -10%, -47 flights), **KLM** (389, +7%, +24), **Ryanair** (369, -28%, -143), **Lufthansa** (325, -17%, -166), **Widerøe** (319, -2%, -6), **Wizz Air** (250, -11%, -31), **Pegasus** (222, +0%, +1), **SAS** (220, -31%, -97) and **DHL Express** (186, -41%, -130). **Yesterday, easyJet was 12th** (163 flights, -70%) and **British Airways was ranked 15th** (125, -36%).
- Over the past two weeks, **most airlines decreased** their **capacity**, for example **easyJet** (-387 flights, -70%), **Vueling** (-144 flights, -57%), **Ryanair** (-143 flights, -28%), **DHL express** (-130 flights, -41%), **British Airways** (-70 flights, -36%) and **Lufthansa** (-66 flights, -17%). On the other side, KLM slightly increased its capacity (+24 flights, +7%) and Turkish Airlines (+20 flights, +4%).
- In terms of dep/arr traffic, the top 8 busiest states remained stable with the exception of **France taking the first rank. France** had the highest number of dep/arr flights with 1,622 flights on Wednesday 6 January (-23% over 2 weeks) followed by **Germany** (1,459, -29%), **the UK** (1,260, -25%), **Spain** (1,159, -36%), **Turkey** (1,110, +2%), Norway (838, -13%), Italy (748, -42%) and the Netherlands (681, -10%).
- **All segments experienced a significant increase of the end-of-the-year break**, in particular **All-cargo** which reached +50% above 2019 levels over Christmas and which is now back to +24% on 31st December. **Business Aviation** is at -13%, **Charter** at -24%, **Traditional** at -67% and **Low-Cost** at -75%.

Traffic Flows & Country Pairs

- **The intra-Europe flow is the main flow** with 7,284 flights on 6 Jan (-27% over 2 weeks). Intra-Europe flights are at -62% compared to 2019 while all other flows are at -60%.
- **Top traffic flow with Europe** are with **“Middle-East”** (517 flights, -5%) followed by **“North-Atlantic”** (352 flights, -15%), “Asia/Pacific” (350 flights, -8%) and “North-Africa” (338 flights, -11%).
- **Domestic flows are the most active** flows (i.e. 9 of the top 10 flows are domestic). The highest decreases for **domestic** flows over 2 weeks were recorded for **Spain** (-39%), **Germany** (-36%), **Italy** (-35%), **the UK** (-29%), **Greece** (-24%), Norway (-14%), Portugal (-10%) and France (-7%). **Domestic flows in Turkey increased** by +2%.

Airports

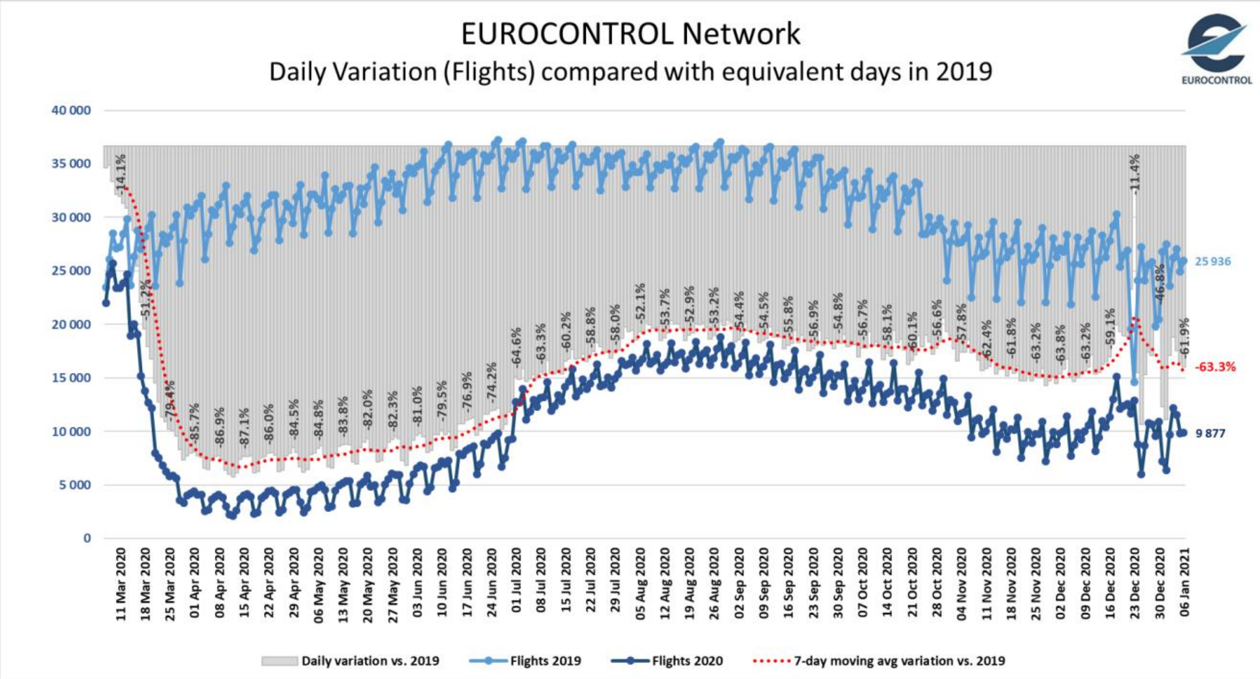
- **Amsterdam** was the busiest airport with 591 Dep/Arr flights on 6 January (-9% over 2 weeks) followed by **Paris CDG** (500, -13%), **İGA Istanbul Airport** (497, +3%), **Frankfurt** (465, -10%), **Madrid** (389, -21%), **London/Heathrow** (332, -23%) and **Istanbul/Sabiha** (326, +5%).
- From the top 8 airports, **most of the airports showed a decrease** over 2 weeks: **Oslo** (-25%), **London/Heathrow** (-23%), **Madrid** (-21%), **Paris CDG** (-13%), **Frankfurt** (-10%), **Amsterdam** (-9%). The other airports reported an increase with Istanbul/Sabiha (+5%) and İGA Istanbul Airport (+3%).

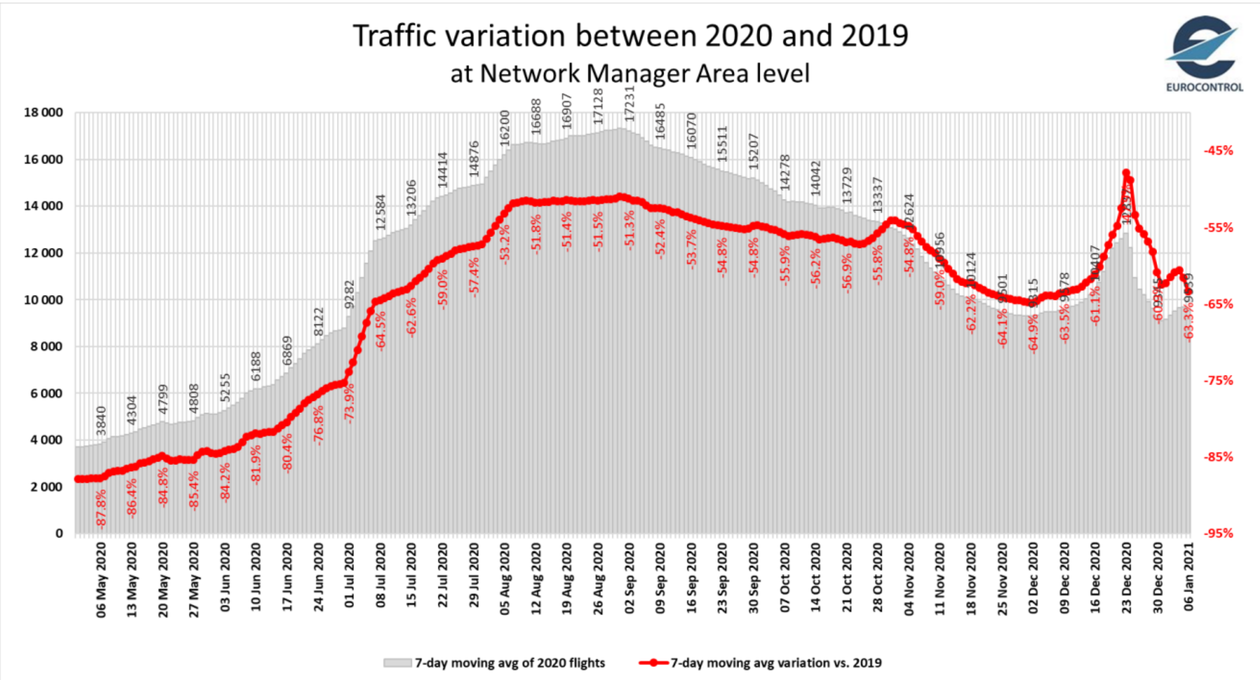
Economics

- **GDP (Oxford Economics):** Downward revision for Q4 2020 (from +2.4% to -2.1%) and for 2021 (from 5.3% to 4.5%). 2020 closed at -6.8%.
- **Jet Fuel Price:** Jet fuel prices have started to rise in November, reaching 136 cts/gal on Tuesday 5 January.

1. Traffic Situation and Airlines Recovery

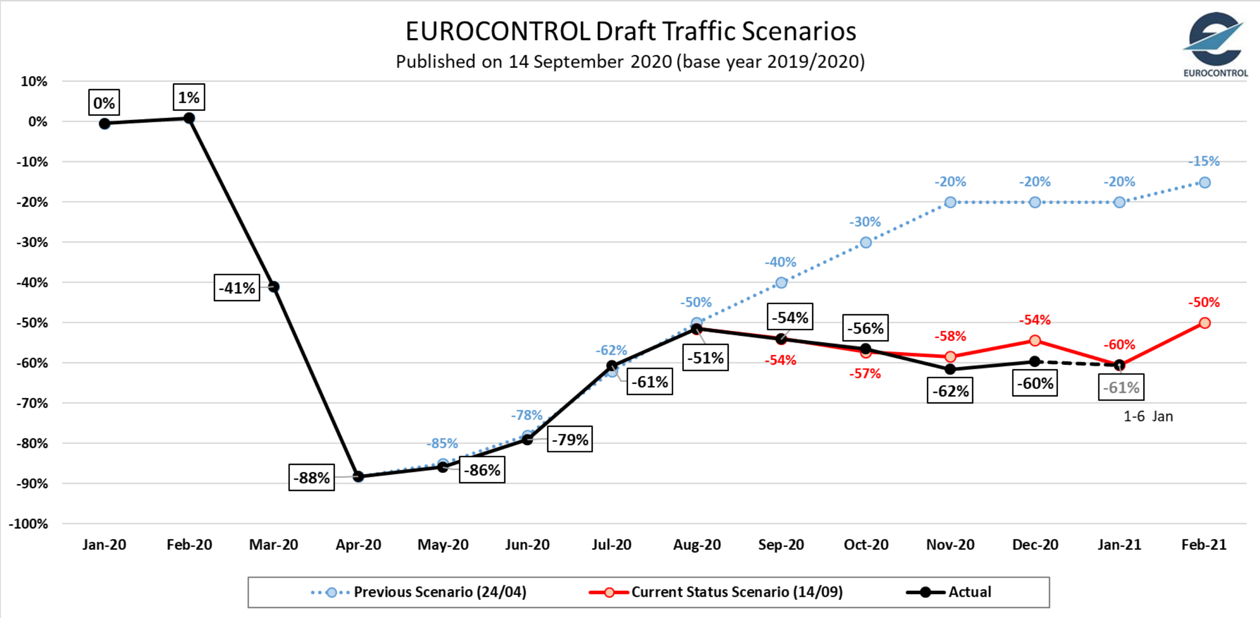
- The network recorded 9,877 flights on Wednesday 6 January (-24% with -3,040 flights compared to Wednesday 23 December). This is 38.1% of 2019 traffic levels. Based on a 7-day moving average, the decrease is -63.3% compared to 2019 and is back to the end November figures after the end-of-the-year-related variations. [Please note: Some anomalies are evident in the first chart below due to the day in which Christmas Day / New Years Day fell in 2020 compared to 2019 but this does not impact materially the 7-day averages.]





Overall situation against EUROCONTROL traffic scenarios:

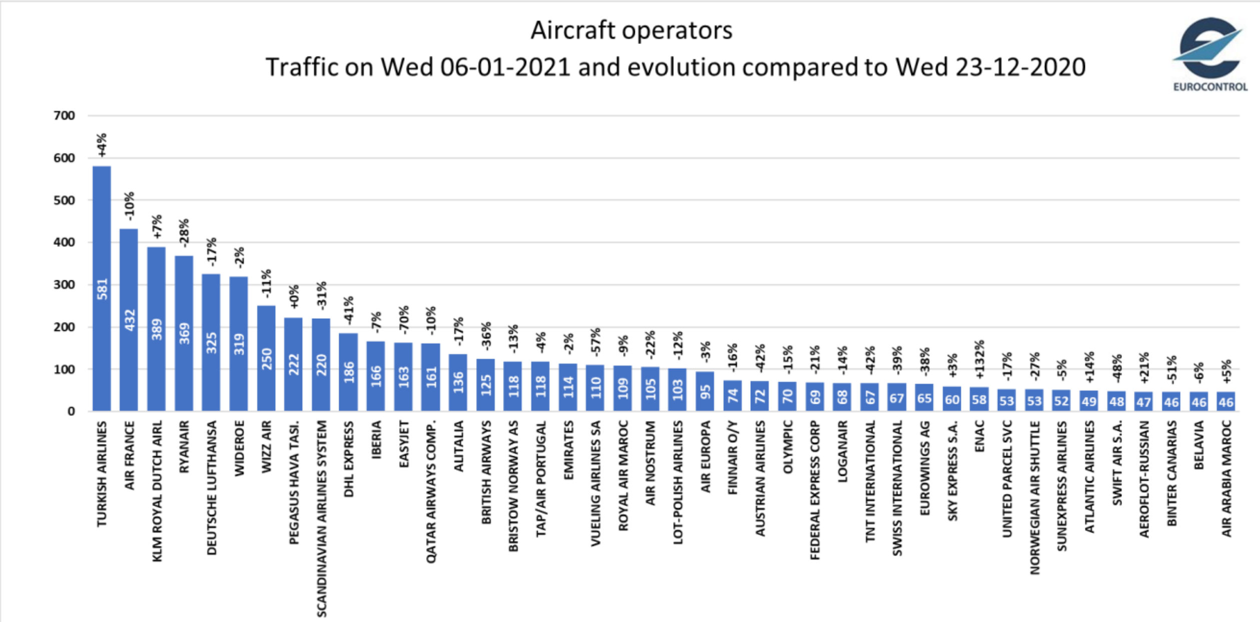
- **The first 6 days of January flights averaged -61% compared to same period in 2019**, close to the scenario published by EUROCONTROL in September 2020. However, it is expected to decrease due to the renewed lockdown across many European countries.



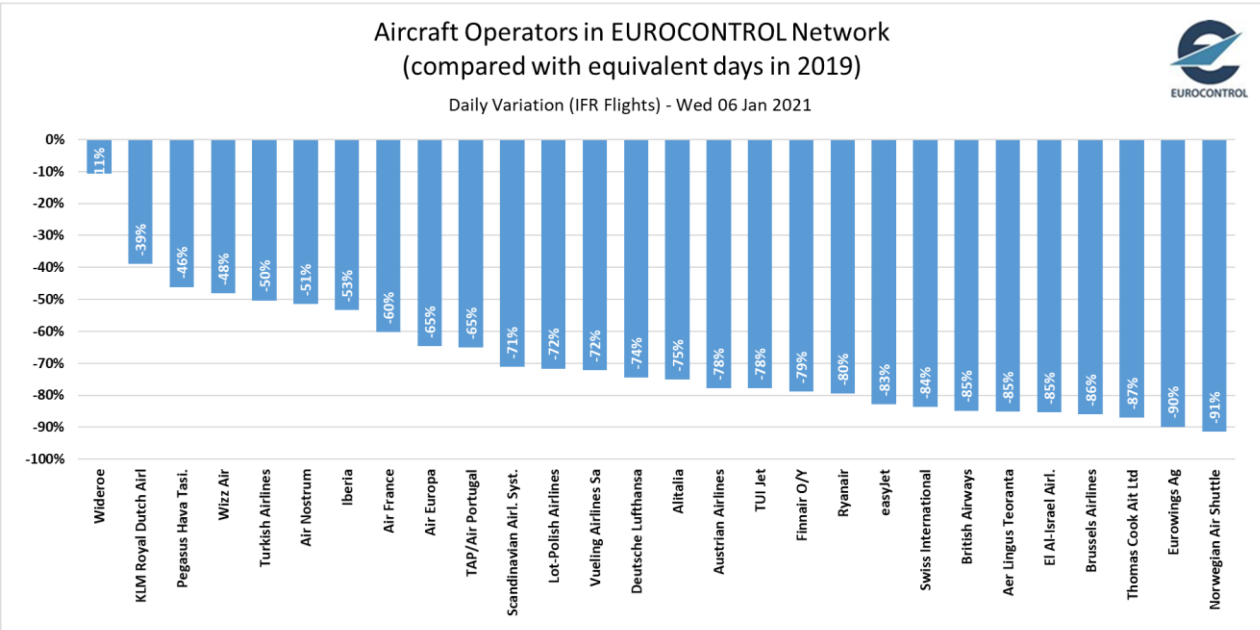
European Airlines:

Overall a generalised decrease in capacity for most airlines compared to Wednesday 23 December 2020, with the exception of KLM and Turkish Airlines.

- **Turkish Airlines** was the airline with the highest number of flights with 581 flights on Wednesday 6 January slightly increasing by +4% compared to Wednesday 23 December (+20 flights), followed by **Air France** (432 flights, -10%, -47 flights), **KLM** (389 flights, +7%, +24 flights), **Ryanair** (369 flights, -28%, -143 flights), **Lufthansa** (325 flights, -17%, -166 flights), **Widerøe** (319 flights, -2%, -6 flights), **Wizz Air** (250 flights, -11%, -31 flight), **Pegasus** (222 flights, +0%, +1 flight), **SAS** (220 flights, -31%, -97 flights) and **DHL Express** (186 flights, -41%, -130 flights). **Yesterday, easyJet was 12th (with 163 flights, down -70%) and British Airways was ranked 15th (with 125 flights, down -36%).**
- Compared to two weeks ago, **most airlines decreased** their **capacity**, for example **easyJet** (-387 flights, -70%), **Vueling** (-144 flights, -57%), **Ryanair** (-143 flights, -28%), **DHL express** (-130 flights, -41%), **British Airways** (-70 flights, -36%) and **Lufthansa** (-66 flights, -17%). On the other side, KLM slightly increased its capacity (+24 flights, +7%) and Turkish Airlines (+20 flights, +4%).



- Compared to 2019, Widerøe operated at -11% on Wednesday 6 January followed by KLM (-39%), Pegasus (-46%), Turkish Airlines (-50%), Air Nostrum (-51%), Iberia (-53%), Air France (-60%), Lufthansa (-74%), Ryanair (-80%) easyJet (-83%) and British Airways (-85%).



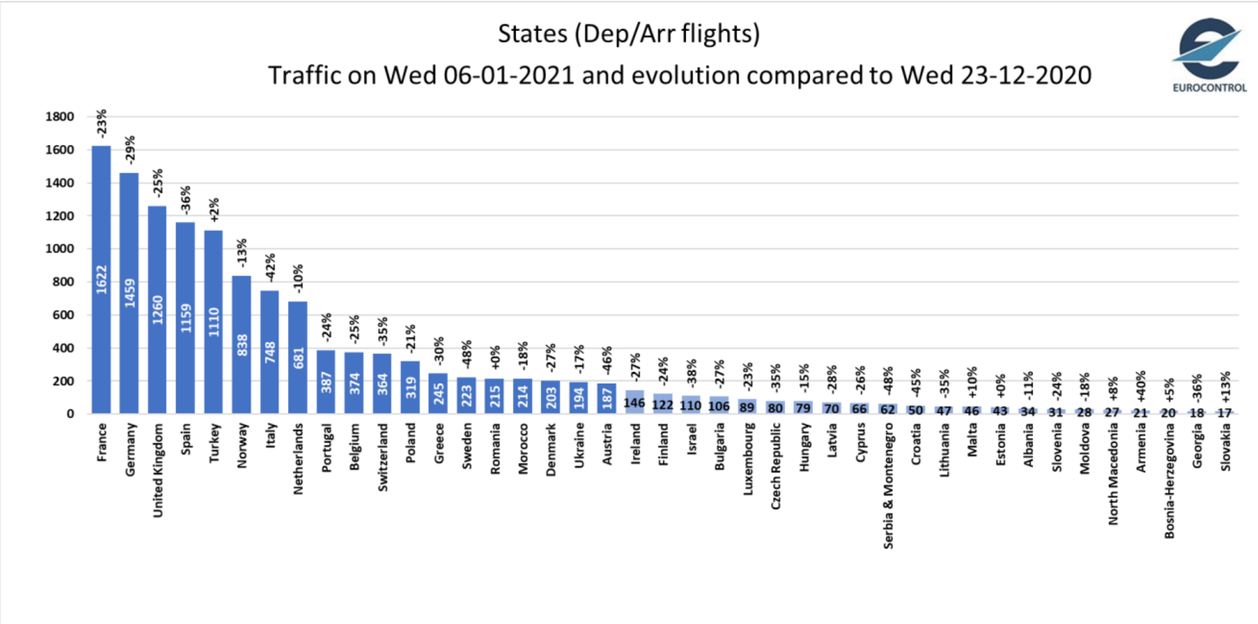
News from key European airlines:

- **Alitalia** €73 million state support package approved by European Commission.
- **British Airlines** receives commitments for a £2 billion loan facility, partially guaranteed by UK Export Finance.
- **easyJet** suspending voting rights of most recent non-EU shareholders in order to ensure a majority of voting rights are held by EU shareholders.
- **IAG** implements national ownership structures in Ireland and Spain.

- **Iberia** operated at 40% of 2019 capacity levels in December.
- **Jet2** reports strong UK demand for holidays in Greece in summer 2021, with additional flights planned.
- **Ryanair** blocking non-EU investors from acquiring shares; passenger numbers down 83% in December.
- **SWISS** chair expects intercontinental traffic will resume in summer 2021 but that, without an improvement in the situation, layoffs will be necessary.
- **Turkish Airlines** resumes operations to the UAE.
- **WizzAir** disenfranchising non-EU shareholders; passengers down 58% in 2020 with a load factor of 75%; for December, passenger numbers were down 80% with a load factor of 56%.

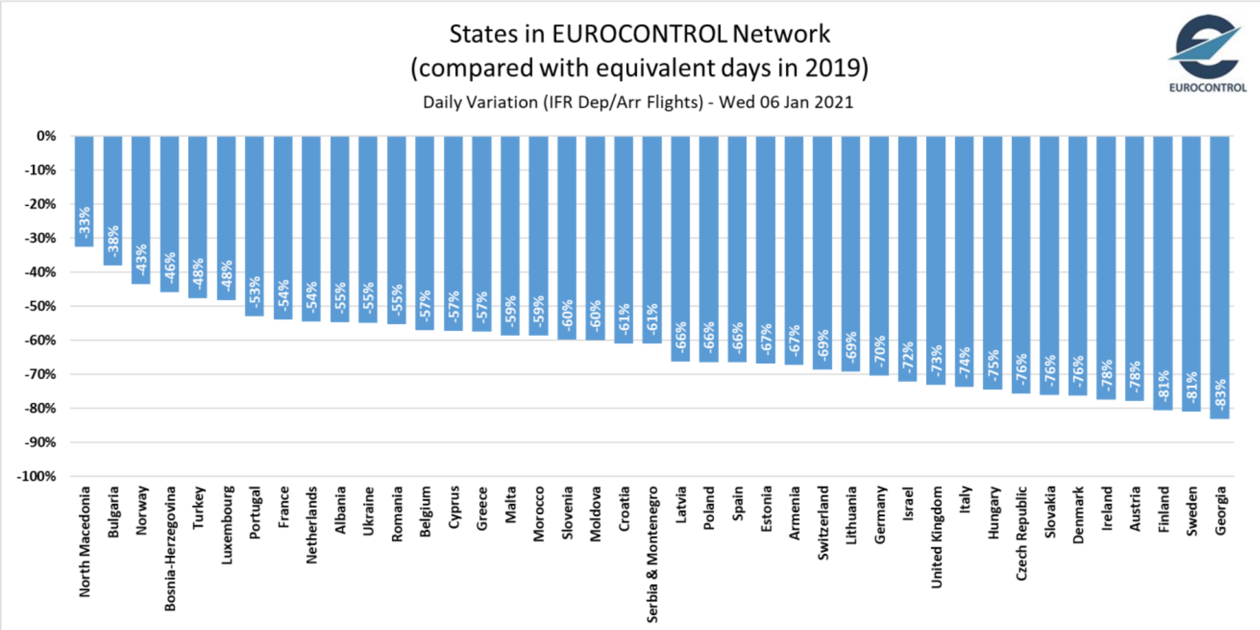
States

- Based on traffic levels, the top 8 busiest states[1] remained broadly stable with France taking the first rank. France was the State with the highest number of dep/arr flights with 1,622 flights on Wednesday 6 January (-23% over 2 weeks) followed by Germany (1,459, -29%), the UK (1,260, -25%), Spain (1,159, -36%), Turkey (1,110, +2%), Norway (838, -13%), Italy (748, -42%) and the Netherlands (681, -10%).



- Compared to 2019, Departure/Arrival traffic on Wednesday 6 January for these top 8 States was: Norway (-43%), Turkey (-48%), France (-54%), the Netherlands (-54%), Spain (-66%), Germany (-70%), the UK (-73%) and Italy (-74%).

[1] excluding overflights.

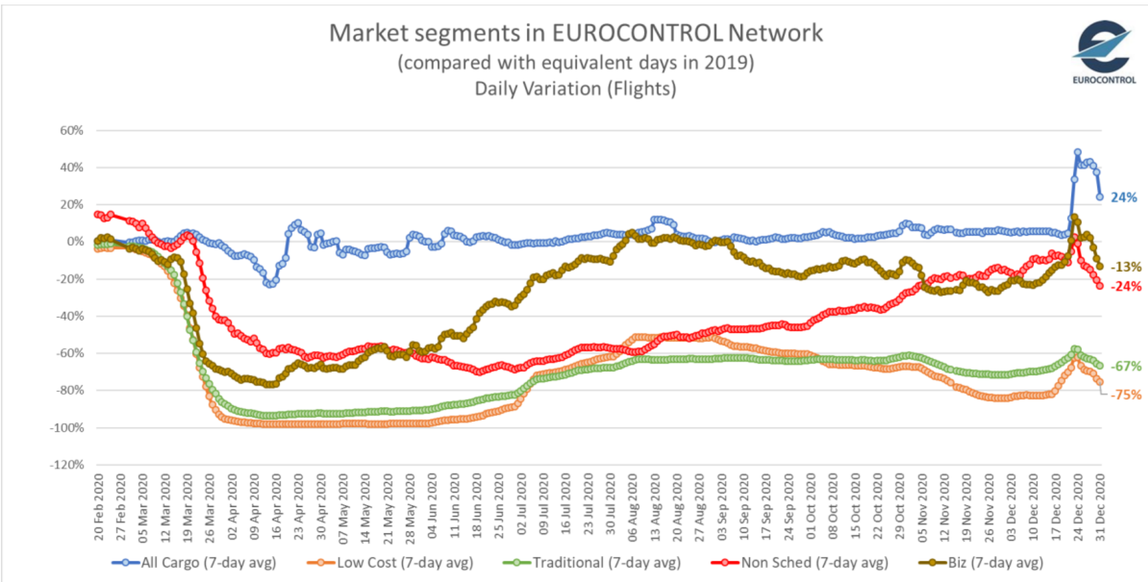


Other

- **Amazon** has announced that it has bought 11 Boeing 767 aircraft in order to boost its cargo fleet.
- **Boeing** consolidating its 787 production in South Carolina.
- **Swissport** is merging its Belgium, Netherlands and Denmark businesses.
- **Thailand** reports 3065 visitor arrivals in November, a decline of 99.9%.

Market Segments:

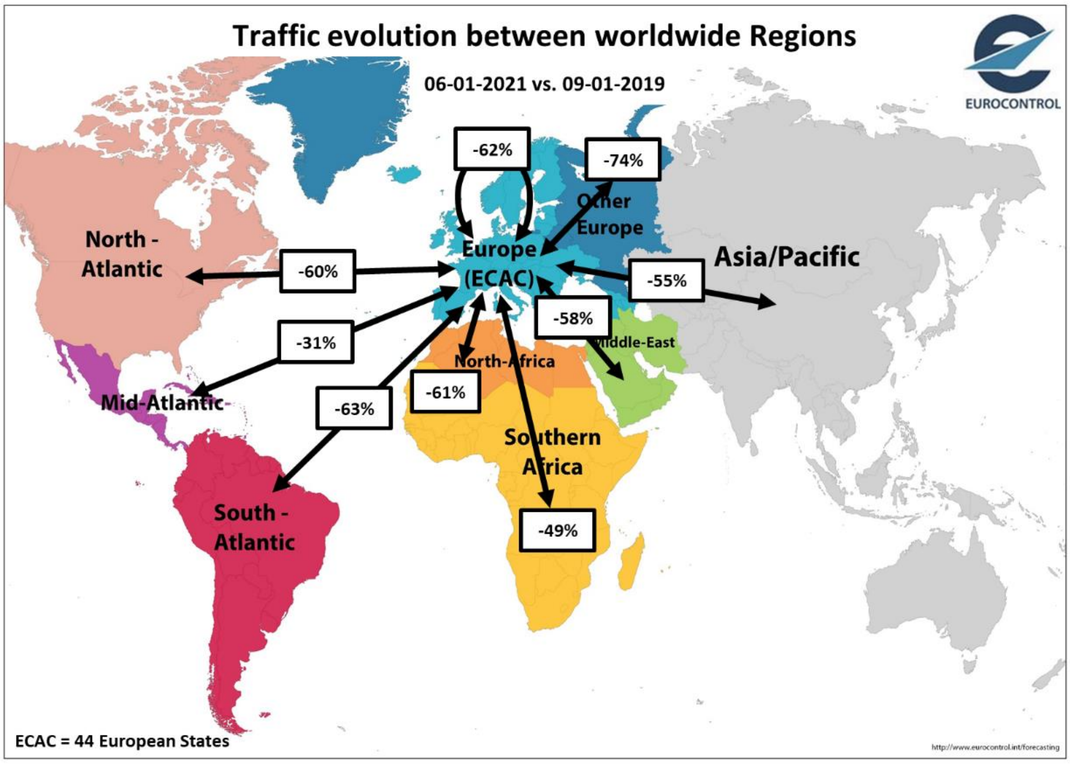
- All segments experienced a significant increase of the end-of-the-year break, in particular **All-cargo** which reached +50% above 2019 levels over Christmas and which is now back to +24% on 31st December. **Business Aviation** is at -13%, **Charter** at -24%, **Traditional** at -67% and **Low-Cost** at -75%.

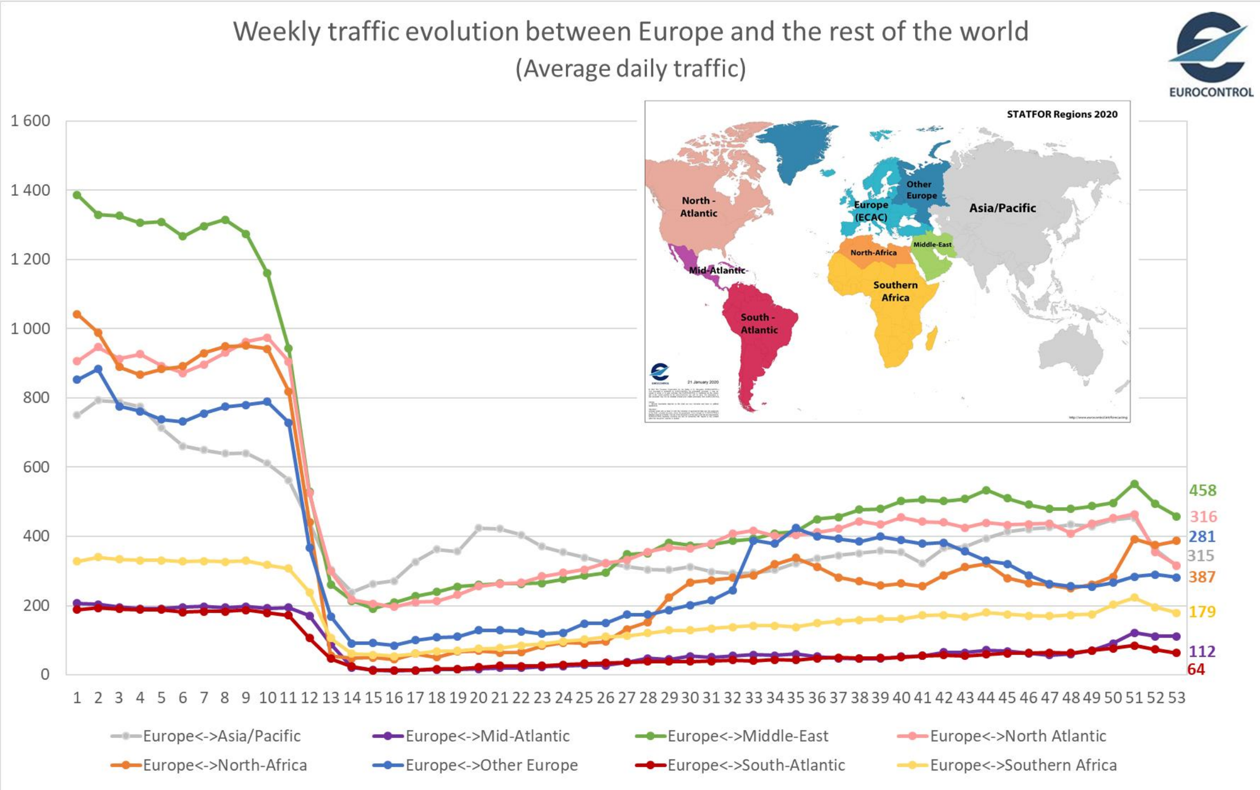


2. Traffic Flows & Country Pairs

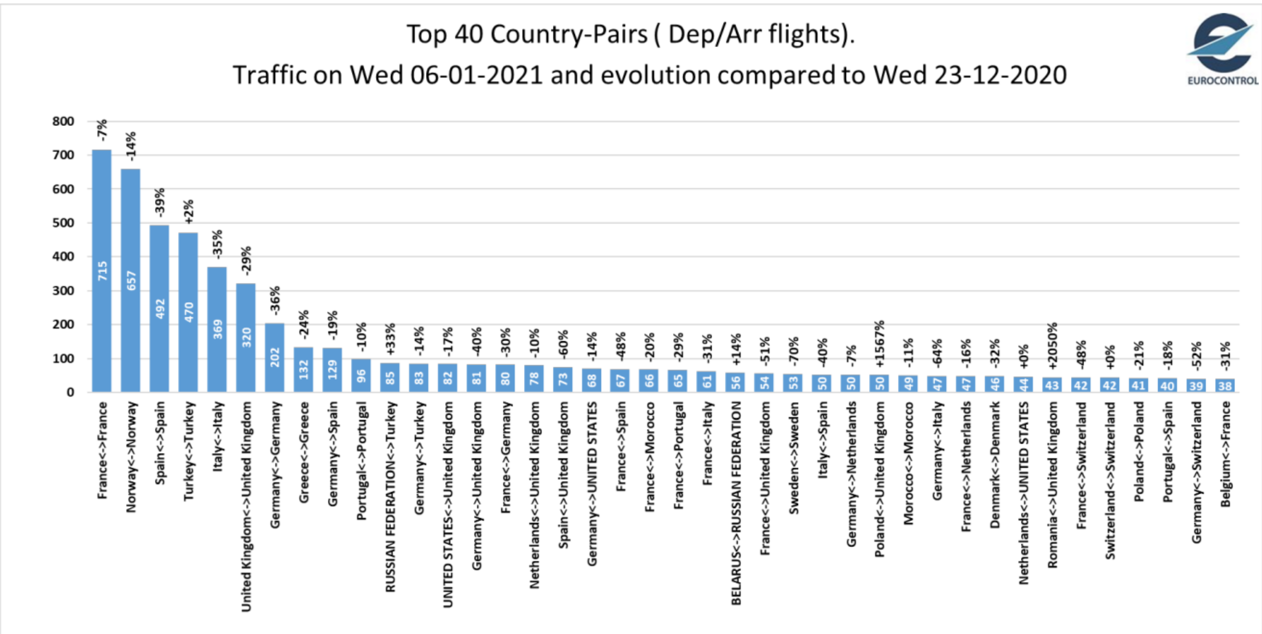
- The main traffic flow is the intra-Europe flow with 7,284 flights on Wednesday 6 January, which is decreasing (-27%) over 2 weeks.
- The top traffic flows with Europe were with "Middle-East" (517 flights, -5%) followed by "North-Atlantic" (352 flights, -15%), "Asia/Pacific" (350 flights, -8%), "North-Africa" (338 flights, -11%) and "Other Europe" (231 flights, -26%).
- Intra-Europe flights are at -62% compared to 2019 while intercontinental flows are at -60%.

REGION	23-12-2020	06-01-2021	%	vs. 2019
Intra-Europe	**9 933**	**7 284**	***-27%***	***-62%***
Europe<->Asia/Pacific	382	350	*-8%*	*-55%*
Europe<->Mid-Atlantic	113	125	*+11%*	*-31%*
Europe<->Middle-East	547	517	*-5%*	*-58%*
Europe<->North Atlantic	415	352	*-15%*	*-60%*
Europe<->North-Africa	380	338	*-11%*	*-61%*
Europe<->Other Europe	312	231	*-26%*	*-74%*
Europe<->South-Atlantic	81	72	*-11%*	*-63%*
Europe<->Southern Africa	218	168	*-23%*	*-49%*
Non Intra-Europe	**2 448**	**2 153**	***-12%***	***-60%***

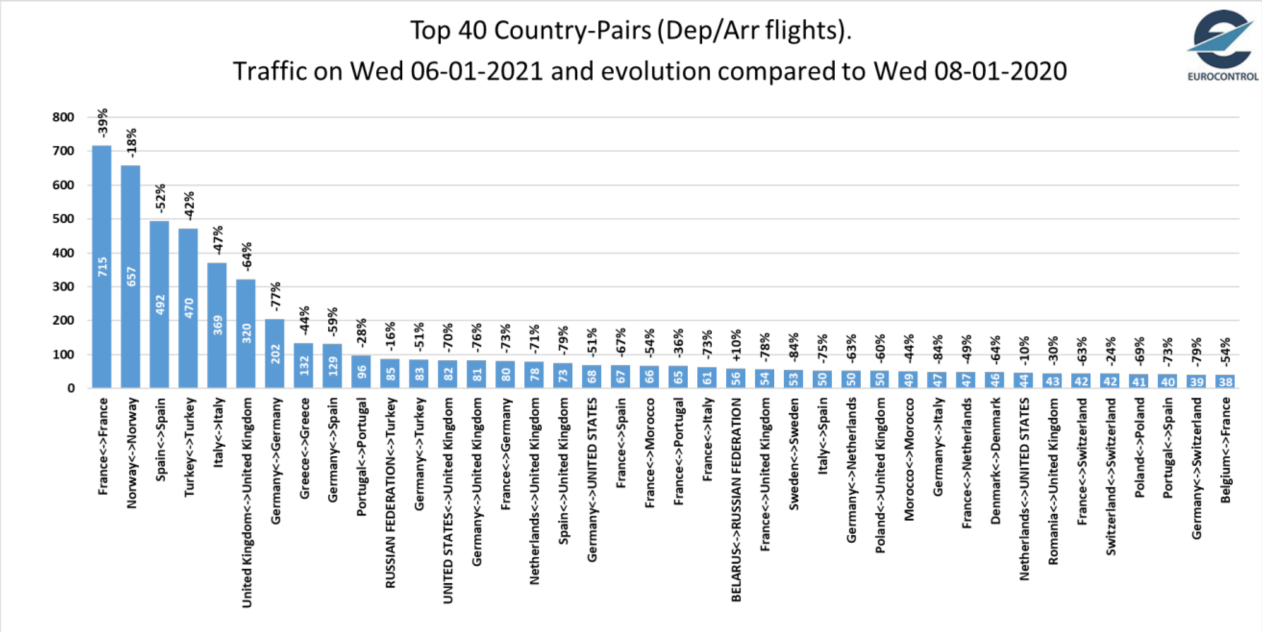




- **Domestic flows are the most active** flows (i.e. 9 of the top 10 flows are domestic). The highest decreases for **domestic** flows over 2 weeks were recorded for **Spain** (-39%), **Germany** (-36%), **Italy** (-35%), **the UK** (-29%), **Greece** (-24%), Norway (-14%), Portugal (-10%) and France (-7%). **Domestic flows in Turkey increased** by +2%.
- The busiest non domestic flows were **Germany-Spain** (129 flights, -19%), **Russia-Turkey** (85 flights, +33%) and **Germany-Turkey** (83 flights, -14%).

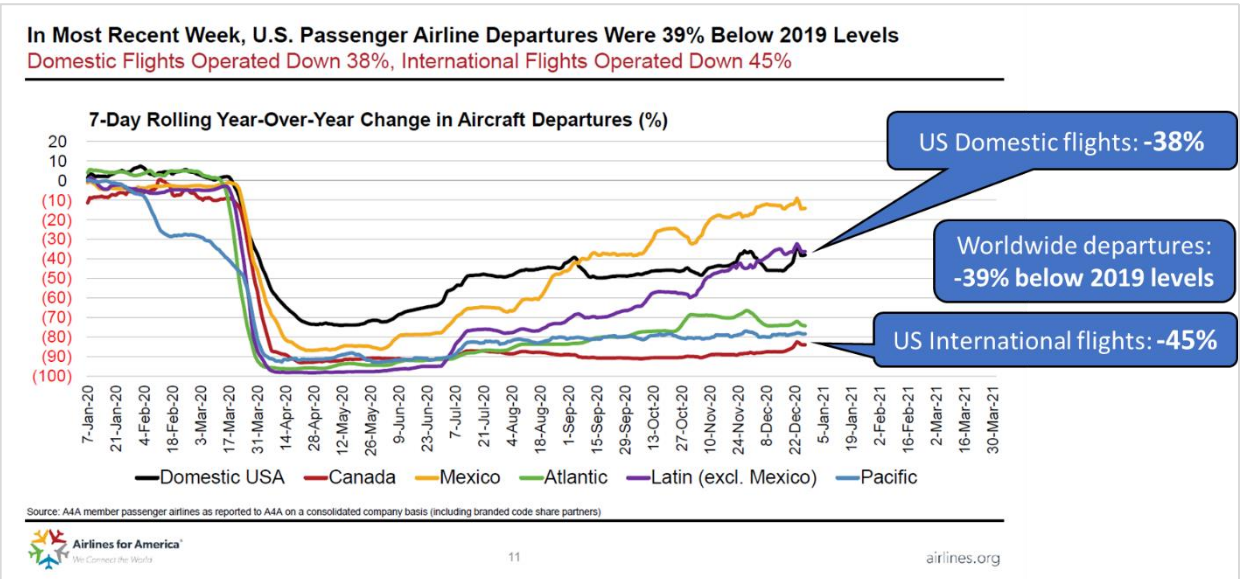


- Compared to 2019, the largest domestic flows on Wednesday 6 January were at -39% for France, -18% for Norway, -52% for Spain, -42% for Turkey, -47% for Italy, -64% for the UK, -77% for Germany, -44% for Greece and -28% for Portugal.

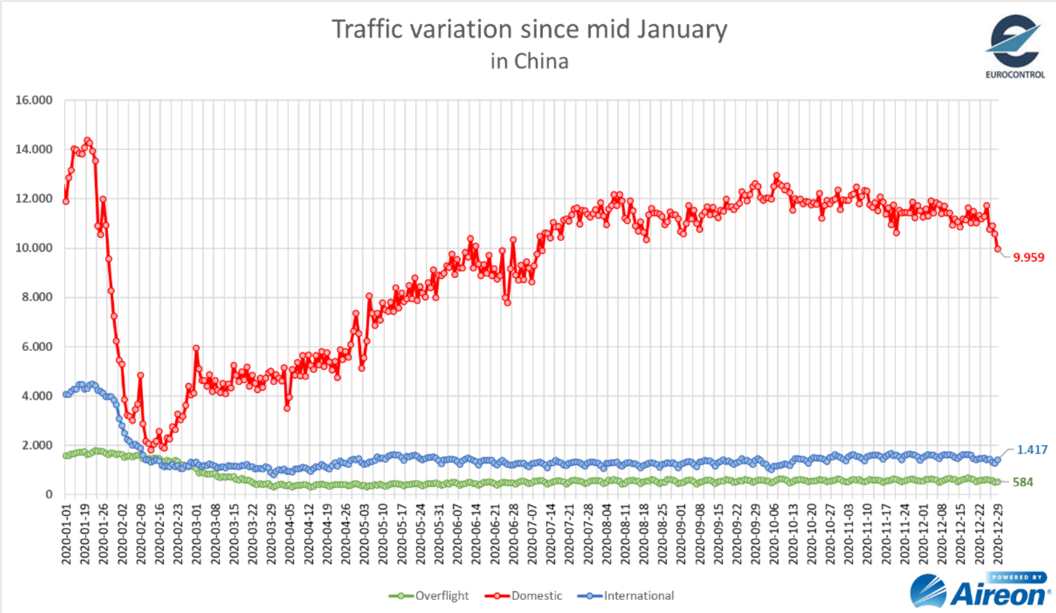


3. Situation outside Europe

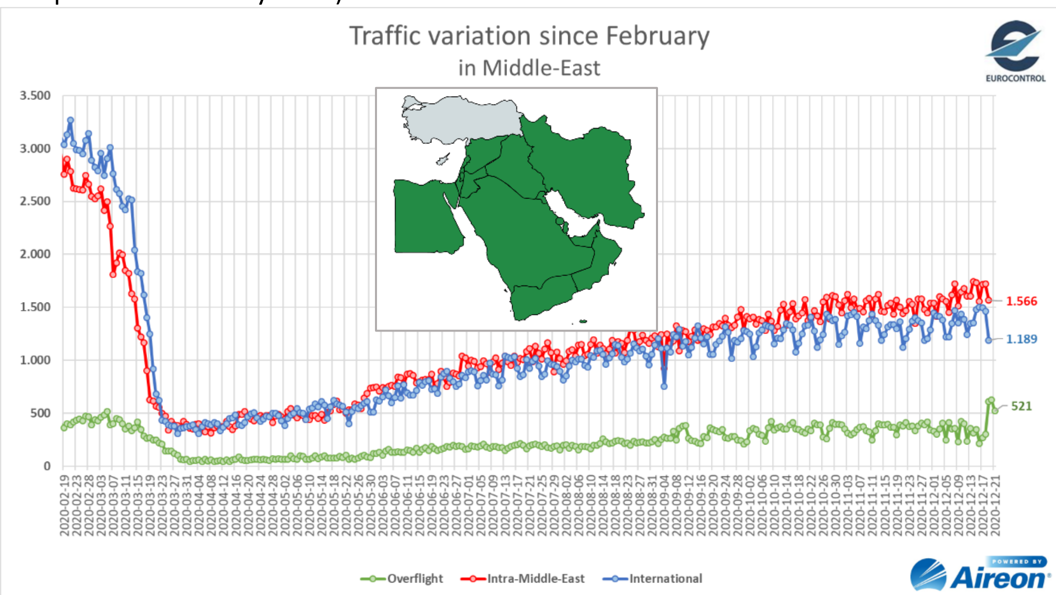
- **United-States (A4A members):**
  - Except for the blip related to Thanksgiving, US domestic traffic is at -38% (vs 2019) on 29 December. Latin America (-35%) and Mexican (-15%) flows continue to increase faster than the other flows over the past weeks.
  - On 29 December, U.S. airlines passenger volumes were 57% below 2019 levels with Domestic down 56% and International down 66%.
  - The domestic U.S. Load Factor averaged 61% in most recent week, versus 88% a year earlier.



- **China:**
  - Chinese domestic flights remain stable with 9,959 flights (-3% compared to 1st January 2020). International flights have been stable too since March with 1,417 flights (-61% compared to 1st January 2020). The same is true for overflights with 584 flights (-61% compared to 1st January 2020).



- **Middle East:**
  - Intra-Middle-East traffic has been increasing slowly reaching 1,566 flights on 21 December (-44% compared to February 2020). International traffic is at 1,189 flights (-61% compared to February 2020). Overflights increased just before Christmas to reach 521 flights (+22% compared to February 2020).



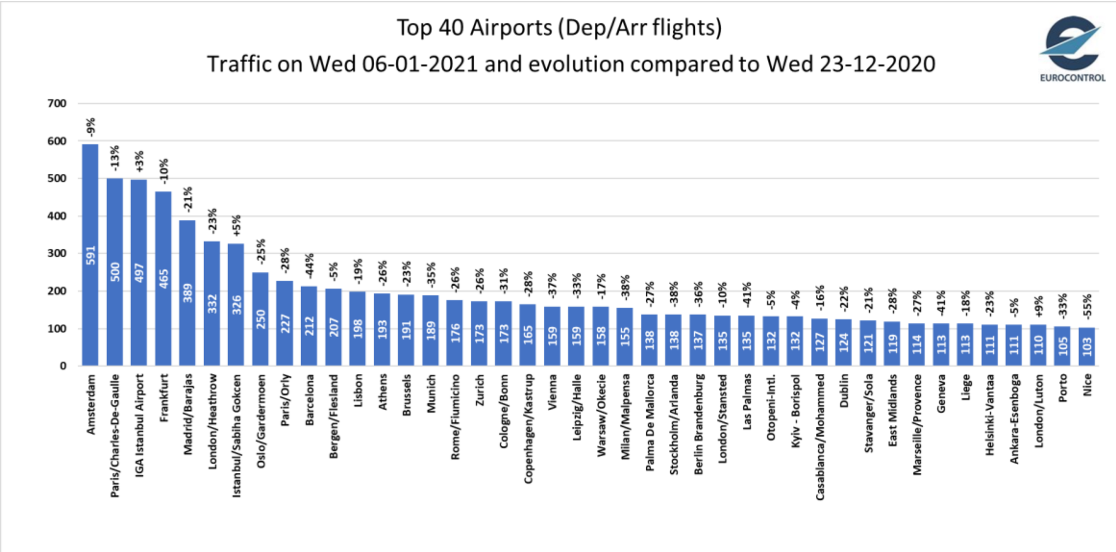
News for worldwide airlines:

- **American Airlines** resumes operations with the Boeing 73 MAX.
- **China Airlines** cargo revenues from January to November increased by 83% on 2019.

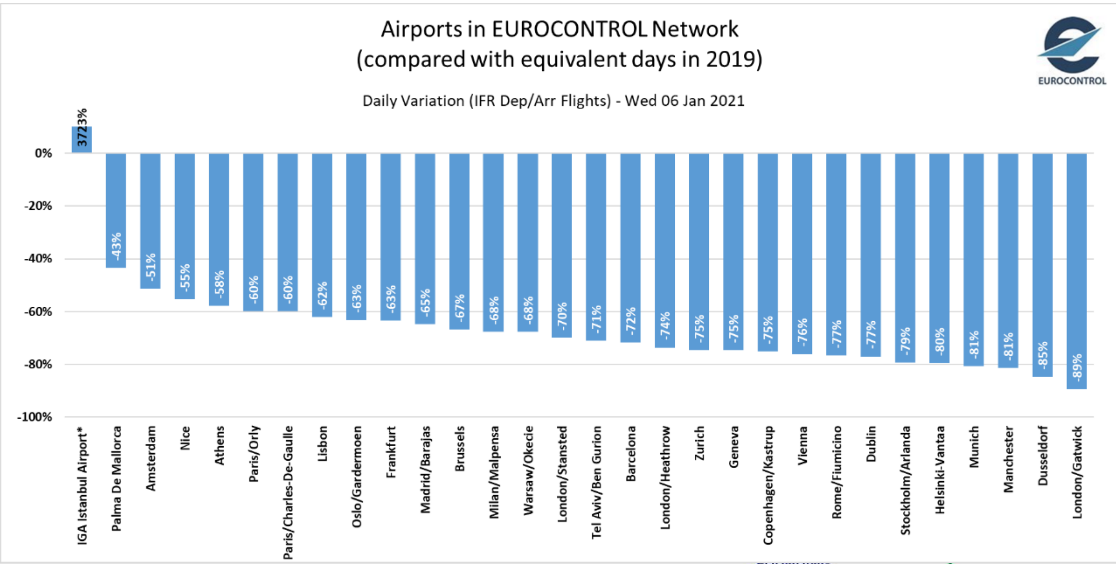
- **Qantas** has resumed accepting international bookings from 1 July 2021.
- **Qatar Airways** notes it went from 33 destinations in May to over 110 destinations at the end of 2020 and it plans 129 by the end of March 2021.
- **Singapore Airlines** resumes service to San Francisco and services from London to Sydney & Auckland.

4. Airport Information

- **Amsterdam** was the busiest airport with 591 Dep/Arr flights on 6 January (-9% over 2 weeks) followed by **Paris CDG** (500, -13%), **İGA Istanbul Airport** (497, +3%), **Frankfurt** (465, -10%), **Madrid** (389, -21%), **London/Heathrow** (332, -23%) and **Istanbul/Sabiha** (326, +5%).
- From the top 8 airports, **most of the airports showed a decrease** over 2 weeks: **Oslo** (-25%), **London/Heathrow** (-23%), **Madrid** (-21%), **Paris CDG** (-13%), **Frankfurt** (-10%), **Amsterdam** (-9%). The other airports reported an increase with Istanbul/Sabiha (+5%) and İGA Istanbul Airport (+3%).



- Compared to 2019, Amsterdam operated at -515% on 6 January, Paris CDG (-60%), Frankfurt (-63%), Oslo (-63%), Madrid (-65%) and London Heathrow (-74%). [*Please note: İGA Istanbul Airport was not in operation in January 2019 and therefore the comparison is meaningless.]

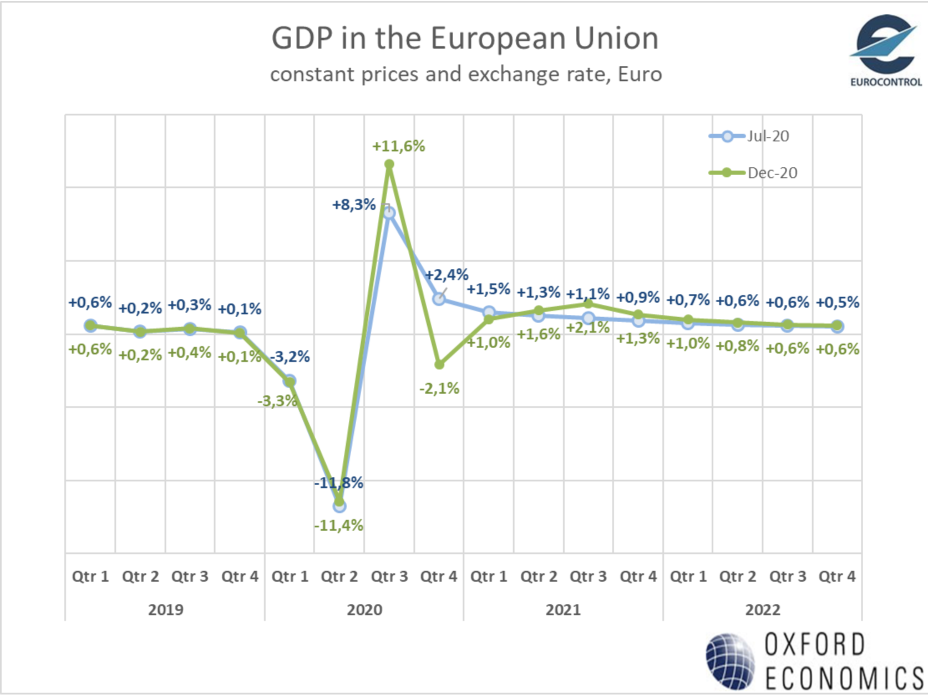


News from European and worldwide airports:

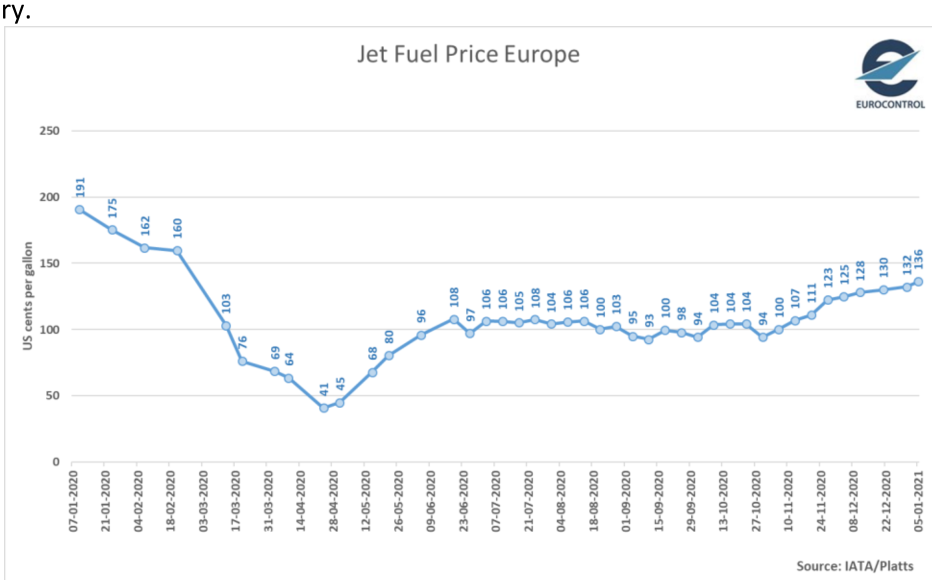
- **Brussels Airport** increasing its COVID-19 testing capacity to 500 per hour.
- **Geneva Airport** reports 84% y-o-y drop in the number of passengers from 23rd to 2th December.
- **Manchester Airport** closes all non-essential stores with food/beverage outlets only open for takeaway purchases.

5. Other factors

- **GDP:** Downward revision for Q4 2020 (from +2.4% to -2.1%) and for 2021 (from 5.3% to 4.5%). 2020 closed at -6.8%.



- **Fuel Price:** Jet fuel prices have started to rise in November, reaching 136 cts/gal on Tuesday 5 January.



To further assist you in your analysis, EUROCONTROL provides the following additional information on a daily basis (daily updates at approximately 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 (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.