COVID19 Impact on European Air Traffic
EUROCONTROL Comprehensive Assessment

EUROCONTROL

Thursday, 21 January 2021

HEADLINES:

- 9,156 flights on 20 January. Traffic at 36% of 2019.
- 7-day rolling average at -64.8% of 2019 (decreasing)
- Decrease in almost all States: -725 flights (-7%) compared to 2 weeks ago (6 Jan)
- Most aircraft operators decreased their capacity, notably Low Cost Carriers. Half of the top 30 airlines are operating below -90% vs 2019
- All top airports showed a decreased in traffic

Traffic Situation & Airlines Recovery

- **Over the first 20 days of January,** traffic is **-62%** compared to the same period in 2019, close to the scenario published by EUROCONTROL in September 2020. However, it is expected to decrease, in particular in February, due to the renewed lockdown and travel restrictions across many European countries.
- **Turkish Airlines** had the highest number of flights with 560 flights on Wed 20 January (-4% compared to Wed 6 January with -21 flights), followed by **Air France** (364 flights, -16%, -68 flights), **Widerøe** (317, -1%, -2), **DHL Express** (275, +48%, +89), **KLM** (242, -38%, -147), **Pegasus** (222, +0%, +0), **Lufthansa** (204, -37%, -121), **Qatar** (176, +9%, +15) and **SAS** (164, -25%, -56). Yesterday, **British Airways was** ranked **17th** (83 flights, -34%), **Ryanair was 23rd** (67 flights, -82%), **easyJet was 46th** (37 flights, -77%) and **Wizz Air was 76th** (20 flights, -92%).
- Over the past two weeks, **most airlines decreased** their **capacity**, for example **Ryanair** (-302 flights, -82%), **Wizz Air** (-230 flights, -92%), **KLM** (-147 flights, -38%), **easyJet** (-126 flights, -77%), **Lufthansa** (-121 flights, -37%), **TAP Portugal** (-71 flights, -61%), **Air France** (-68 flights, -16%), **SAS** (-56 flights, -25%) and **British Airways** (-42 flights, -34%). **Only a few airlines increased their capacity like DHL express** by +89 flights (+48%).
- Compared to 2019, Widerøe operated yesterday at -13%, Pegasus (-48%), Turkish Airlines (-56%), Air Nostrum (-58%), Iberia (-59%), KLM (-62%), Air France (-67%), Lufthansa (-86%), **British Airways** (-90%), **easyJet** (-96%) and **Ryanair** (-96%). **Almost half of the top airlines operated at less than -90%.**
- For States, **Germany** moved back to the 1st rank and had the highest number of dep/arr flights with 1,551 flights on Wed 20 January (+6% over 2 weeks) followed by **France** (1,514, -7%), **Turkey** (1,068, -4%), **Spain** (917, -21%), **the UK** (833, -34%), **Norway** (825, -2%), **Italy** (664, -14%) and **the Netherlands** (519, -24%).
- Compared to 2019, Norway operated at -42%, Turkey (-51%), France (-55%), the Netherlands (-62%), Germany (-70%), Spain (-72%), Italy (-76%) and **the UK (-82%)**.
- After the Christmas period, **market segments are back to pre-holiday levels: all-cargo** is at +7% vs 2019, **Business Aviation** is at -31%, **Charter** at -10%, **Traditional** at -69% and **Low-Cost** at -85%.

Traffic Flows & Country Pairs

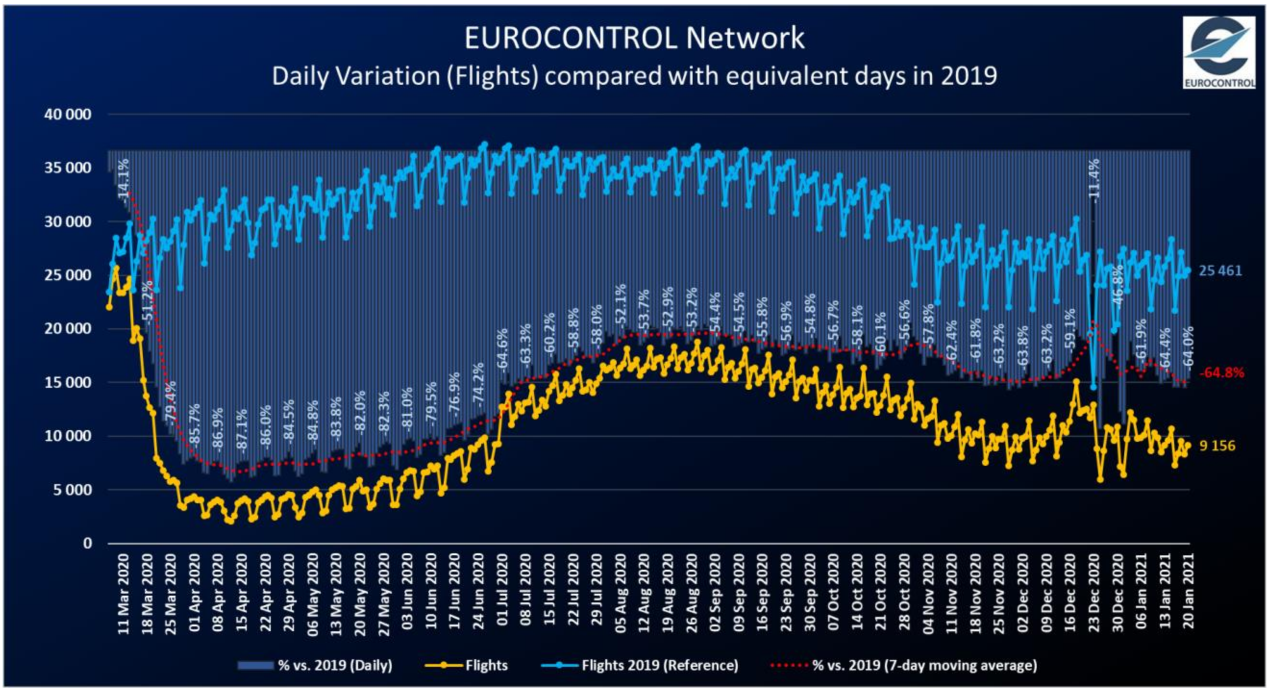
- **The intra-Europe flow is the main flow** with 6,646 flights on 20 Jan (-9% over 2 weeks). Intra-Europe flights are at -67% compared to 2019 while all other flows are at -57%.
- **Top traffic flow with Europe** are with **"Middle-East"** (510 flights, -1%) followed by **"Asia/Pacific"** (391 flights, +12%), **"North-Atlantic"** (363 flights, +3%), **"North-Africa"** (283 flights, -16%).
- The highest domestic flows are within **France** (736 flights), **Norway** (650 flights), **Turkey** (500 flights), **Spain** (446 flights), **Germany** (404 flights), **Italy** (258 flights), **the UK** (234 flights) and **Greece** (165 flights).
- The **biggest decreases** over 2 weeks were recorded for **the UK** (-76%), **Sweden** (-73%), **Italy** (-66%), **Germany** (-62%) and **Spain** (-59%).

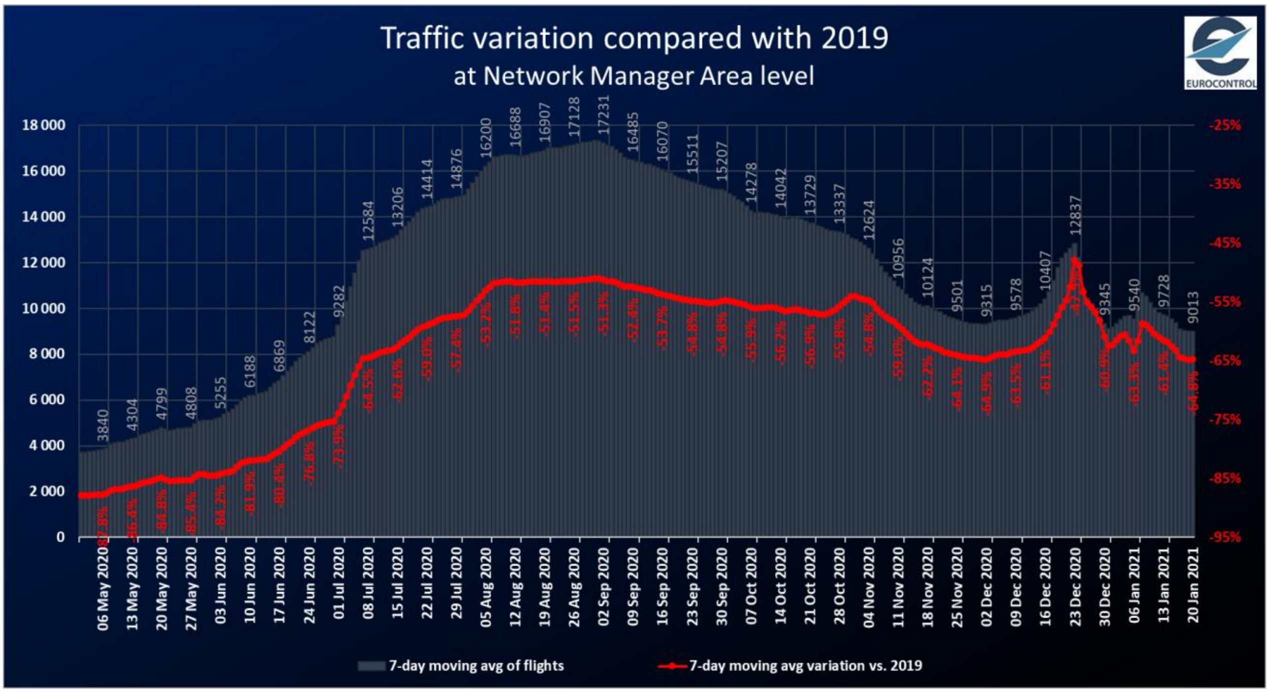
Airports and Passengers

- **İGA Istanbul Airport** was the busiest airport with 482 Dep/Arr flights on 20 January (-3% over 2 weeks) followed by **Amsterdam** (435, -26%), **Paris CDG** (434, -13%), **Frankfurt** (400, -14%), **Madrid** (365, -6%), **Istanbul/Sabiha** (307, -6%), **London/Heathrow** (264, -20%), and **Oslo** (217, -13%).
- From the top 8 airports, **all airports showed a decrease** over 2 weeks: **Amsterdam** (-26%), **London/Heathrow** (-20%), **Frankfurt** (-14%), **Paris CDG** (-13%), **Oslo** (-13%), **Madrid** (-6%) and **Istanbul/Sabiha** (-6%). Only **Leipzig** (+34%) and **Cologne/Bonn** (+12%) showed an increase.
- ACI reported -79% of passengers in December 2020 (vs December 2019) and -78% for the first 11 days of 2021.

1. Traffic Situation and Airlines Recovery

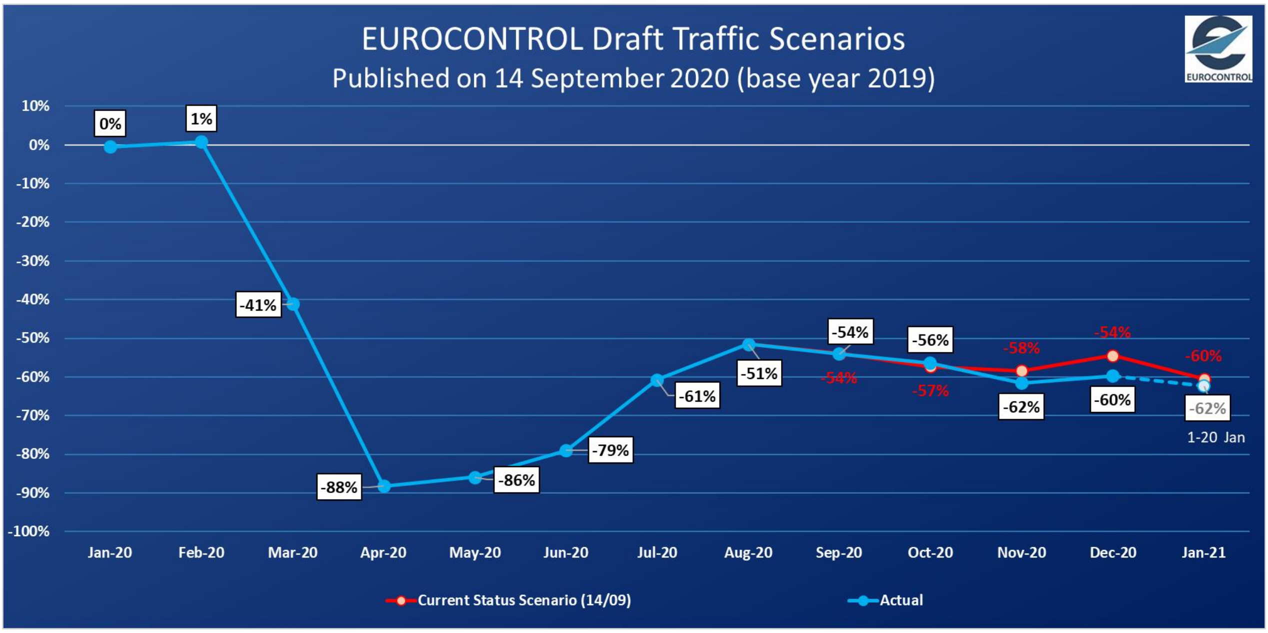
- The network recorded 9,156 flights on Wednesday 20 January (-7% with -725 flights compared to Wednesday 6 January). This is 36% of 2019 traffic levels. Based on a 7-day moving average, the decrease is -64.8% compared to 2019.





Overall situation against EUROCONTROL traffic scenarios:

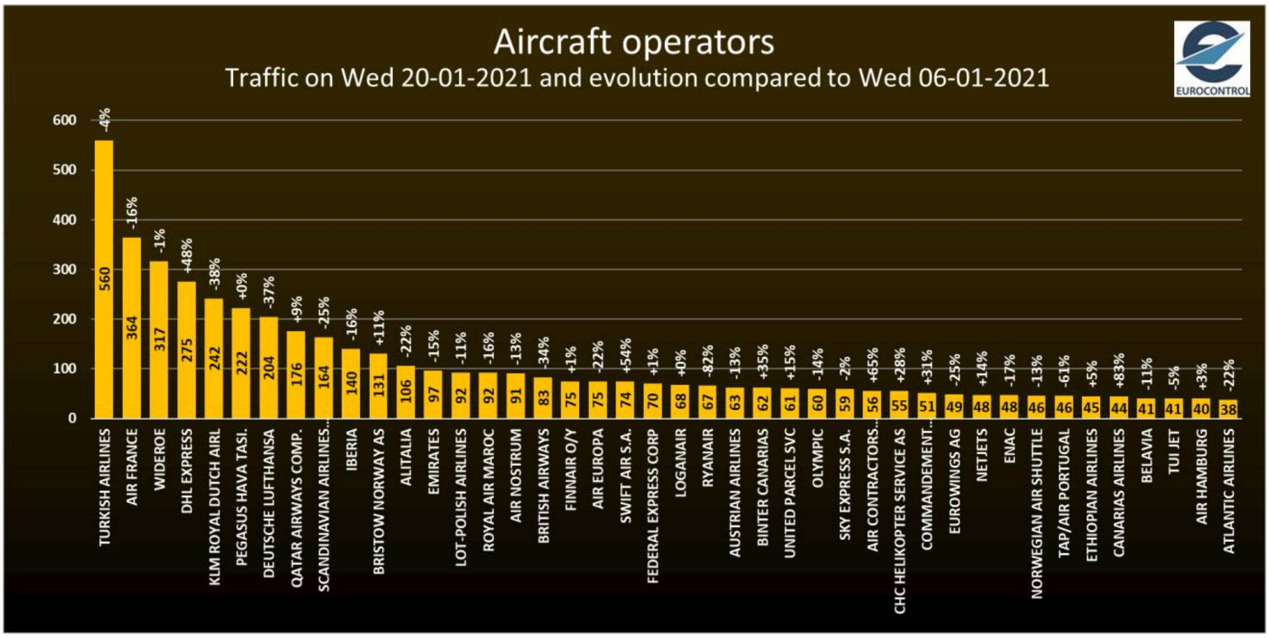
- **The first 20 days of January flights averaged -62% compared to same period in 2019**, close to the scenario published by EUROCONTROL in September 2020. However, it is expected to further decrease, in particular in February, due to the renewed lockdown and travel restrictions across many European countries. EUROCONTROL is currently preparing new traffic scenarios for the months ahead.



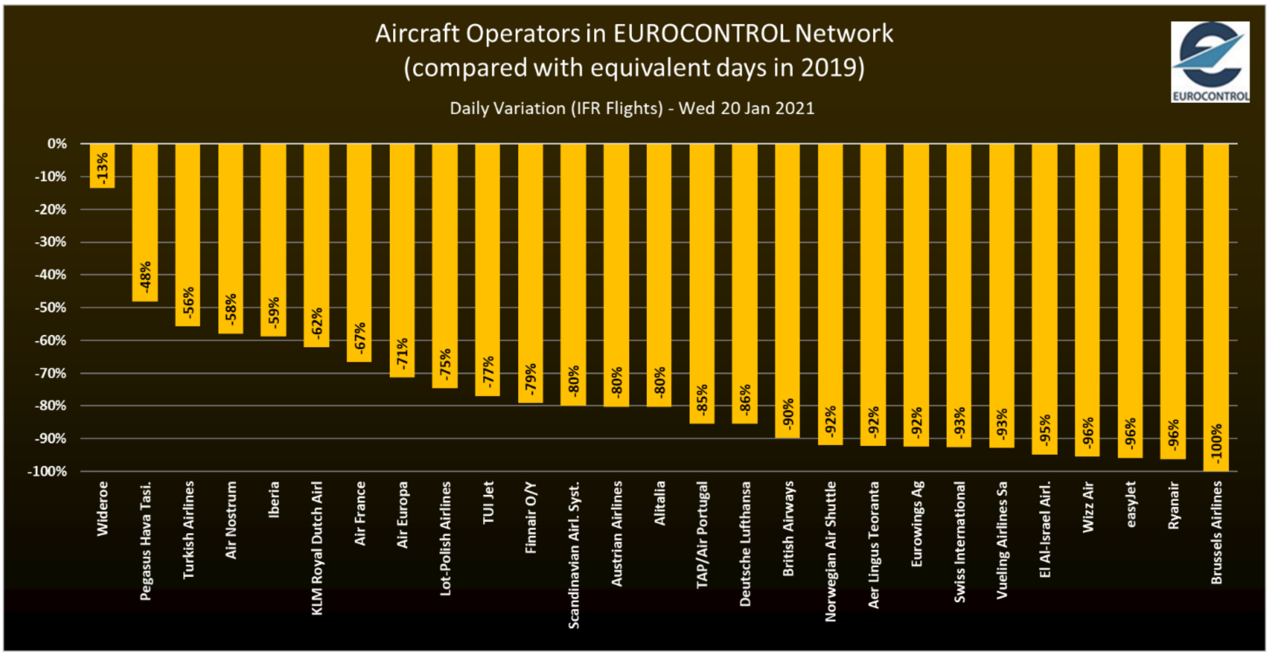
European Airlines:

Overall a generalised decrease in capacity for most airlines compared to Wednesday 30 December 2020.

- **Turkish Airlines** was the airline with the highest number of flights with 560 flights on Wednesday 20 January slightly decreasing by -4% compared to Wednesday 6 January (-21 flights), followed by **Air France** (364 flights, -16%, -68 flights), **Widerøe** (317 flights, -1%, -2 flights), **DHL Express** (275 flights, +48%, +89 flights), **KLM** (242 flights, -38%, -147 flights), **Pegasus** (222 flights, +0%, +0 flights), **Lufthansa** (204 flights, -37%, -121 flights), **Qatar** (176 flights, +9%, +15 flights), **SAS** (164 flights, -25%, -56 flights), **Iberia** (140 flights, -16%, -26 flights) and **Bristow Norway** (131 flights, +11%, +13 flights). Yesterday, **British Airways was** ranked **17th** (with 83 flights, down -34%), **Ryanair was 23rd** (with 67 flights, down -82%), **easyJet was 46th** (with 37 flights, down -77%) and **Wizz Air was 76th** (with 20 flights, down -92%).
- Compared to two weeks ago, **most airlines decreased** their **capacity**, for example **Ryanair** (-302 flights, -82%), **Wizz Air** (-230 flights, -92%), **KLM** (-147 flights, -38%), **easyJet** (-126 flights, -77%), **Lufthansa** (-121 flights, -37%), **TAP Portugal** (-71 flights, -61%), **Air France** (-68 flights, -16%), **SAS** (-56 flights, -25%) and **British Airways** (-42 flights, -34%). **Only a few airlines increased their capacity like DHL express** by +89 flights (+48%).



- Compared to 2019, Widerøe operated at -13% on Wednesday 20 January followed by Pegasus (-48%), Turkish Airlines (-56%), Air Nostrum (-58%), Iberia (-59%), KLM (-62%), Air France (-67%), Lufthansa (-86%), British Airways (-90%), easyJet (-96%) and Ryanair (-96%). Almost half of the top 30 airlines operated at less than -90%.



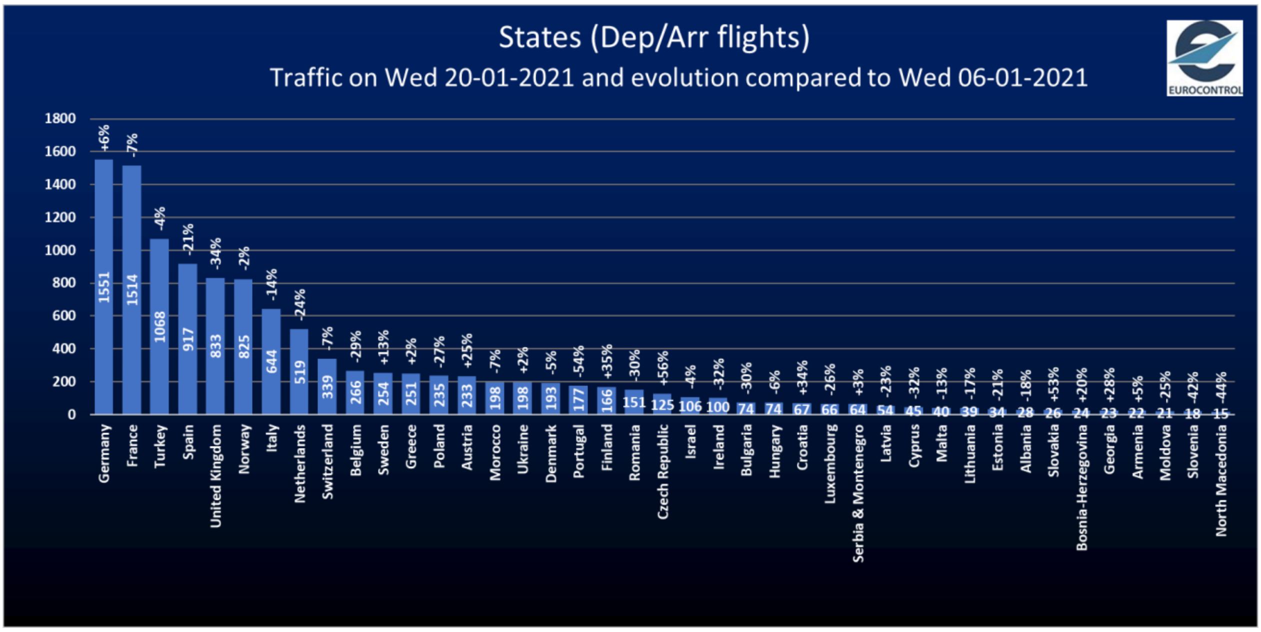
News from key European airlines:

- **Austrian Airlines** planning to phase out its Boeing 767s.
- **British Airways** cargo staff at Heathrow to strike for nine days from 22 January.
- **easyJet** furloughed cabin crew to assist with UK vaccination programme.
- **IAG Cargo** announces (14 January) that it has transported more than one million vaccine doses.
- **Norwegian** suspending all long haul activities, focusing for 2021 and 2022 on short haul and core Nordics business; reinitiates talks with government on state participation.

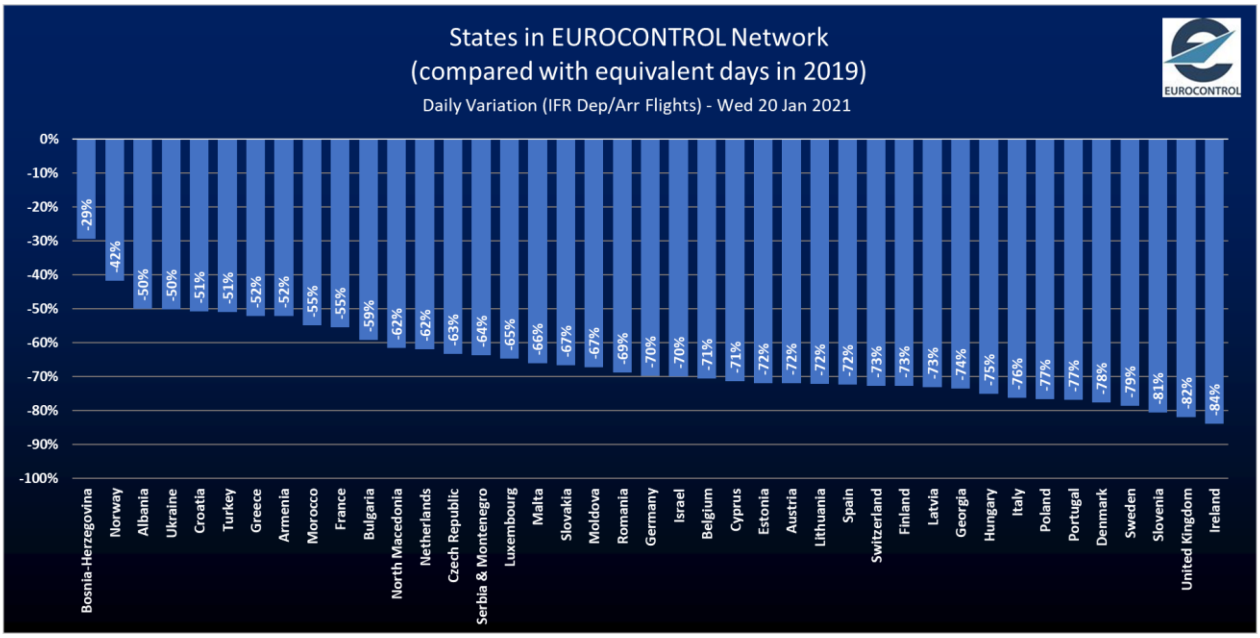
- **Wizz Air** issues a €500 million debut 4 year bond; is cancelling the launch of a number of routes from Belgrade in the spring.

States

- The top 8 busiest states[1] remained broadly stable with Germany taking back the 1st rank. **Germany** was the State with the highest number of dep/arr flights with 1,551 flights on Wednesday 20 January (+6% over 2 weeks) followed by **France** (1,514, -7%), **Turkey** (1,068, -4%), **Spain** (917, -21%), **the UK** (833, -34%), **Norway** (825, -2%), **Italy** (664, -14%) and **the Netherlands** (519, -24%).



- Compared to 2019, Departure/Arrival traffic on Wednesday 20 January for these top 8 States was: Norway (-42%), Turkey (-51%), France (-55%), the Netherlands (-62%), Germany (-70%), Spain (-72%), Italy (-76%) and the UK (-82%).



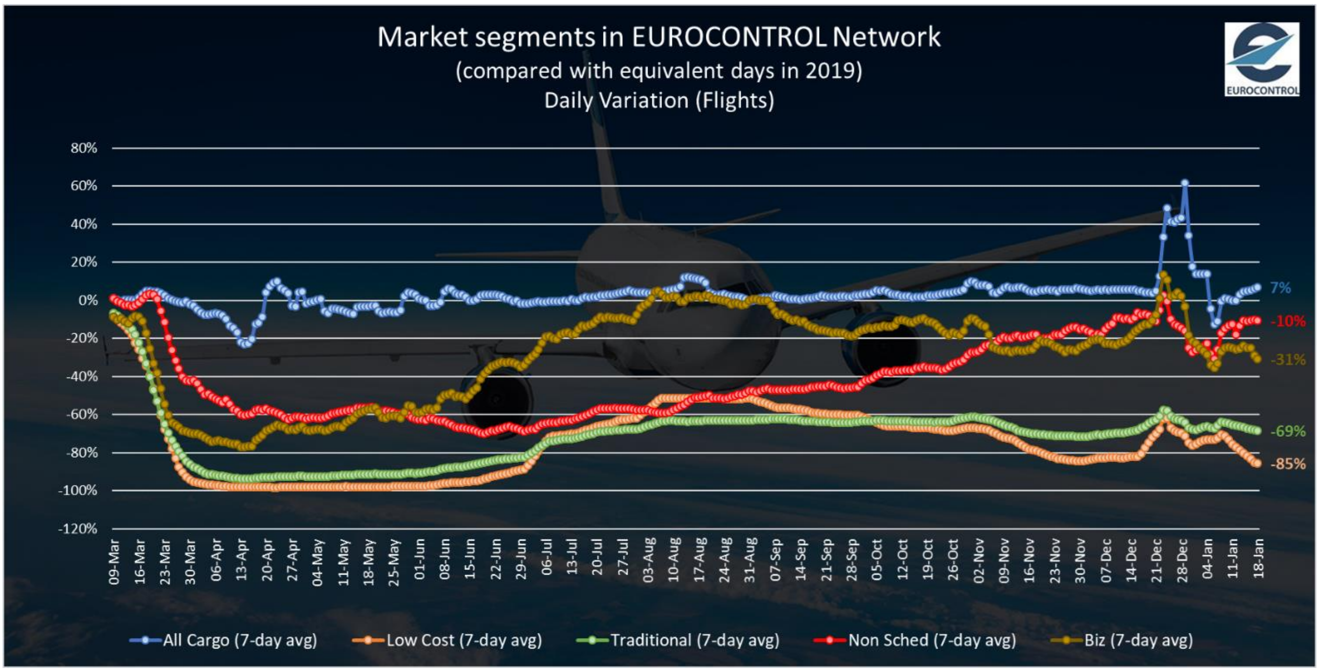
[1] excluding overflights.

News from Regulatory Authorities:

- **EASA** to recertify Boeing 737MAX.

Market Segments:

- After the blip over Christmas[2] break, first weeks of 2021:
    - **All-cargo,** the only segment which consistently grew over 2020, continues to record **solid** increase with **+7%** (vs 2019).
    - **Charter** and **Business Aviation** returned to their pre-Christmas rates with, respectively, **-10%** and **-31%** (vs 2019).
    - **Traditional** and **Low-Cost,** while accounting the majority of flights (respectively 49% and 26% of all flights), are showing signs of slowdown. Recent days showed they are down to **-69%** and **-85%** respectively (vs 2019).

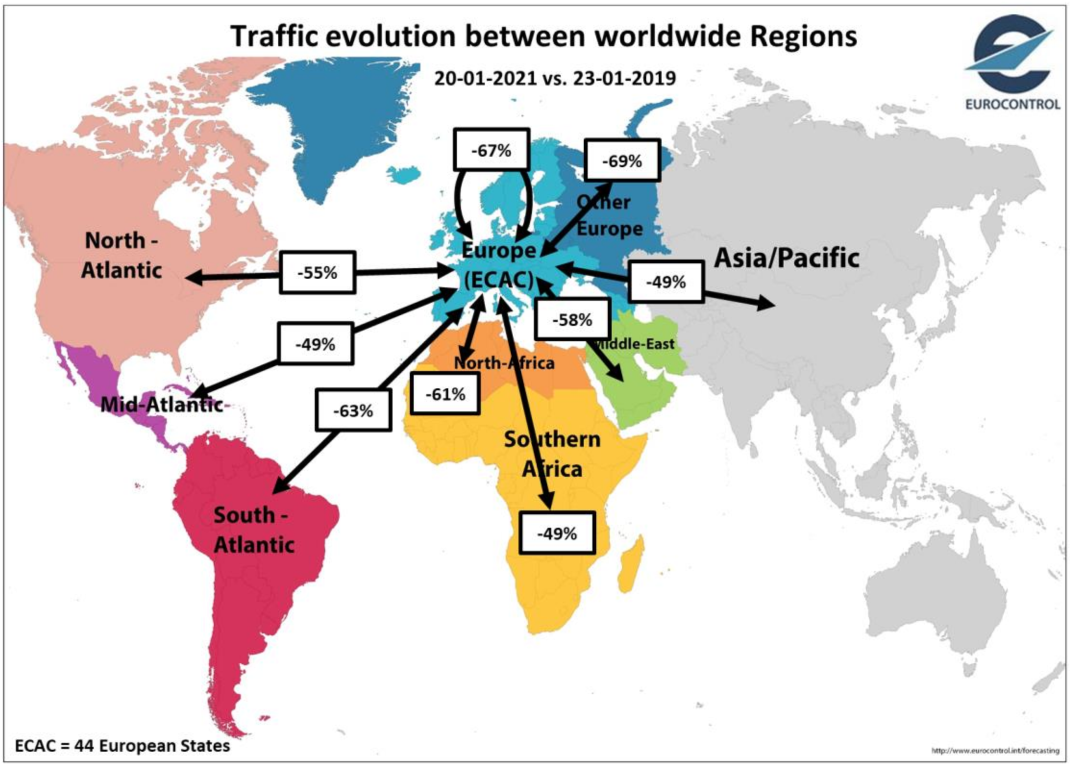


2. Traffic Flows & Country Pairs

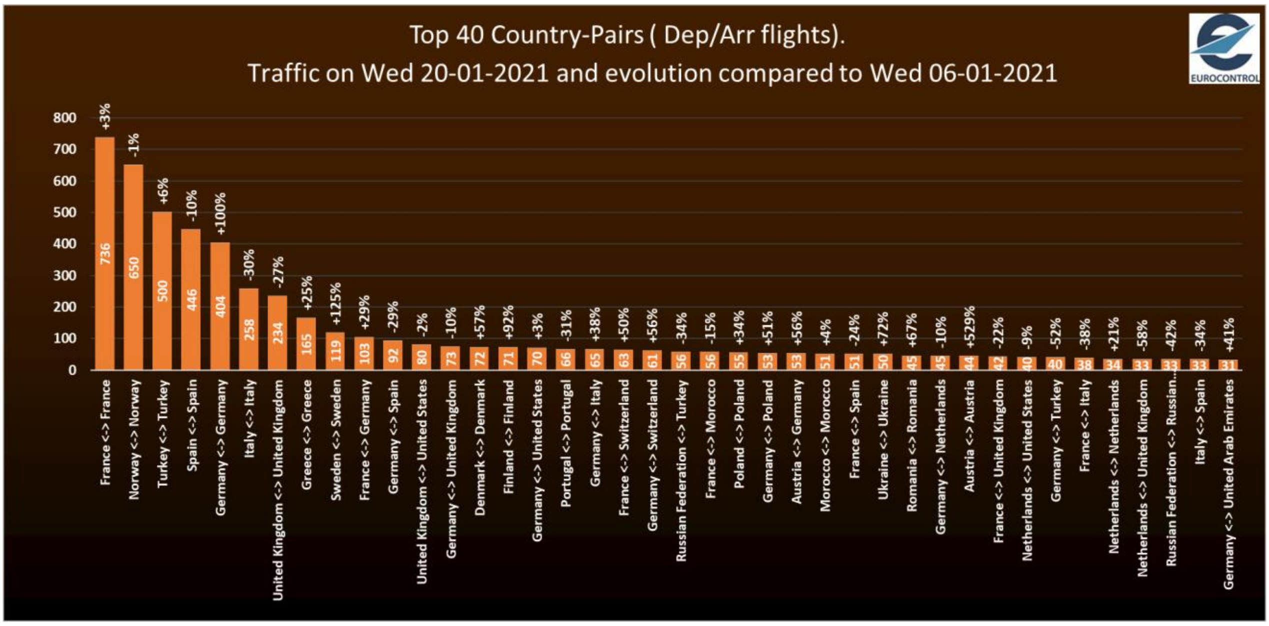
- The main traffic flow is the intra-Europe flow with 6,646 flights on Wednesday 20 January, which is decreasing (-9%) over 2 weeks.
- The top traffic flows with Europe were with "Middle-East" (510 flights, -1%) followed by "Asia/Pacific" (391 flights, +12%), "North-Atlantic" (363 flights, +3%), "North-Africa" (283 flights, -16%) and "Other Europe" (236 flights, +2%).
- Intra-Europe flights are at -67% compared to 2019 while intercontinental flows are at -57%.

[2] All segments show an artificial blip on 23 Dec 2020 as comparable day was Christmas day in 2019.

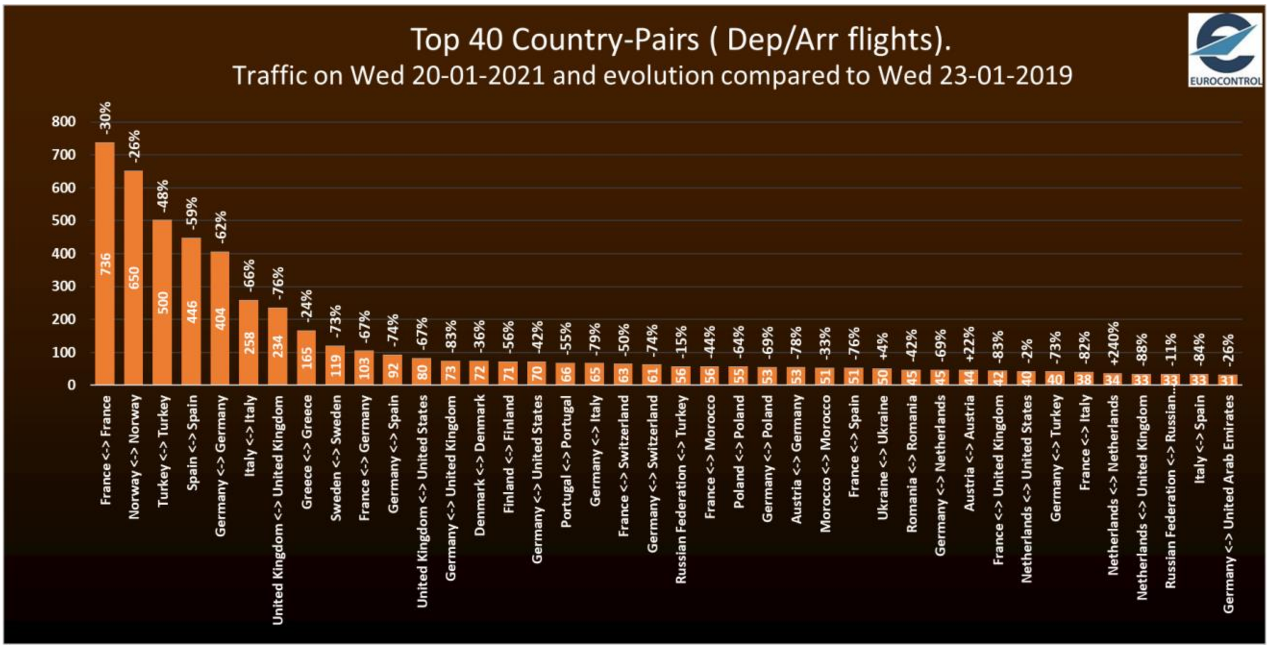
REGION	06-01-2021	20-01-2021	%	vs. 2019
Intra-Europe	**7 288**	**6 646**	***-9%***	***-67%***
Europe<->Asia/Pacific	350	391	*+12%*	*-49%*
Europe<->Mid-Atlantic	125	85	*-32%*	*-49%*
Europe<->Middle-East	517	510	*-1%*	*-58%*
Europe<->North Atlantic	352	363	*+3%*	*-55%*
Europe<->North-Africa	338	283	*-16%*	*-61%*
Europe<->Other Europe	231	236	*+2%*	*-69%*
Europe<->South-Atlantic	71	69	*-3%*	*-63%*
Europe<->Southern Africa	168	162	*-4%*	*-49%*
Non Intra-Europe	**2 152**	**2 099**	***-2%***	***-57%***



- **Domestic flows are the most active** flows (i.e. 9 of the top 10 flows are domestic). The highest domestic flows are within **France** (736 flights), **Norway** (650 flights), **Turkey** (500 flights), **Spain** (446 flights), **Germany** (404 flights), **Italy** (258 flights), **the UK** (234 flights), **Greece** (165 flights) and **Sweden** (119 flights). The biggest decreases over 2 weeks were recorded for **the UK** (-76%), **Sweden** (-73%), **Italy** (-66%), **Germany** (-62%) and **Spain** (-59%).
- The busiest non domestic flows were **France-Germany** (103 flights), **Germany-Spain** (92 flights), **UK-US** (80 flights) and **Germany-UK** (73 flights).

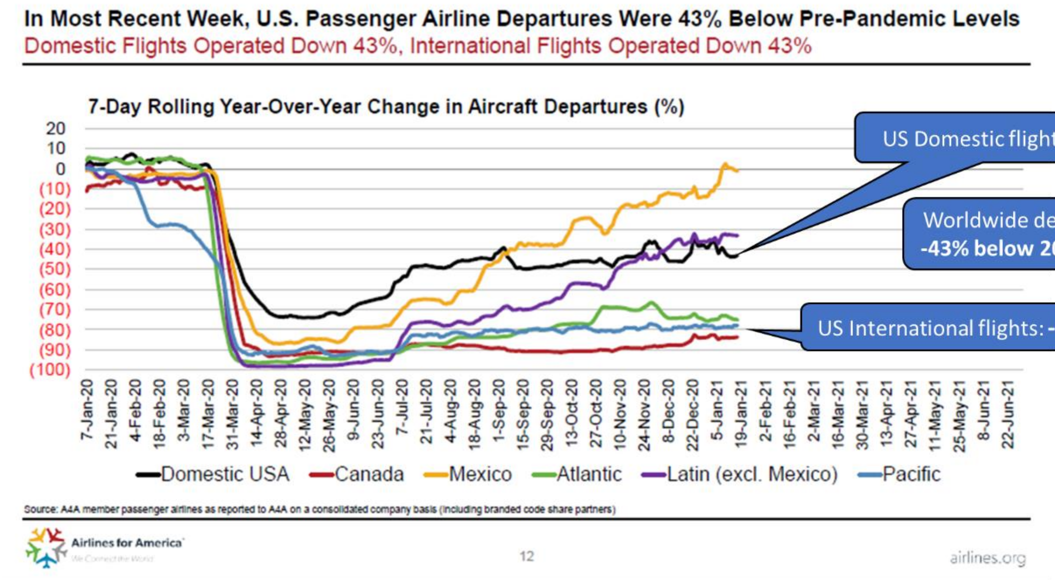


- Compared to 2019, the largest domestic flows on Wednesday 20 January were at -30% for France, -26% for Norway, -48% for Turkey, -59% for Spain, -62% for Germany, -66% for Italy, -76% for the UK and -24% for Greece.

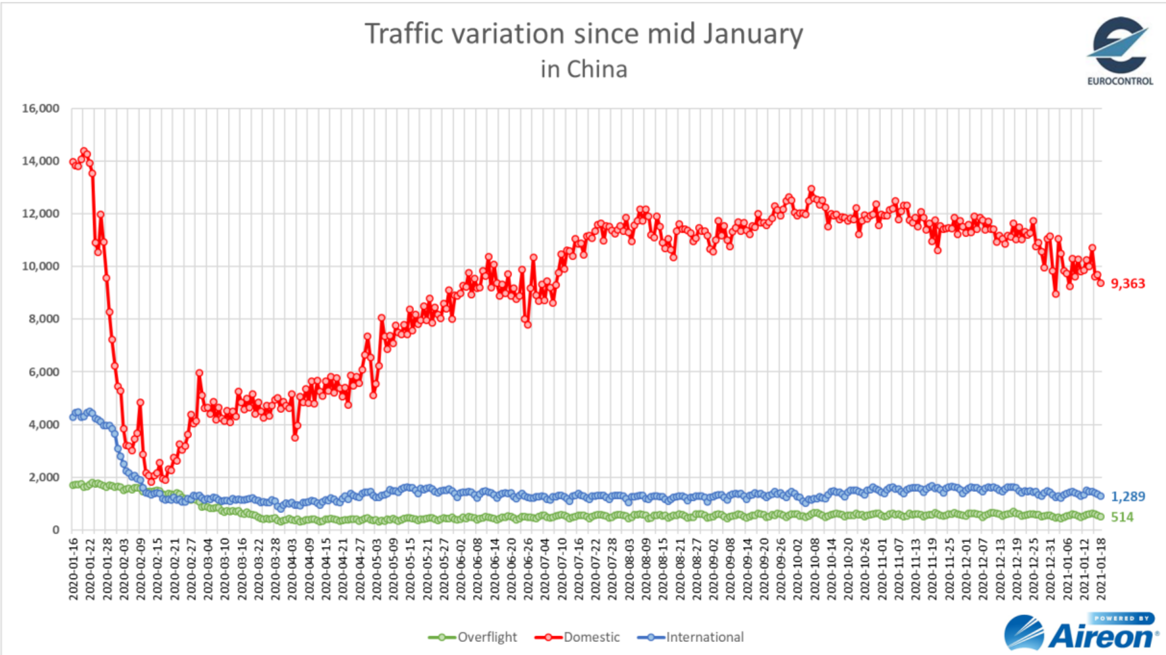


3. Situation outside Europe

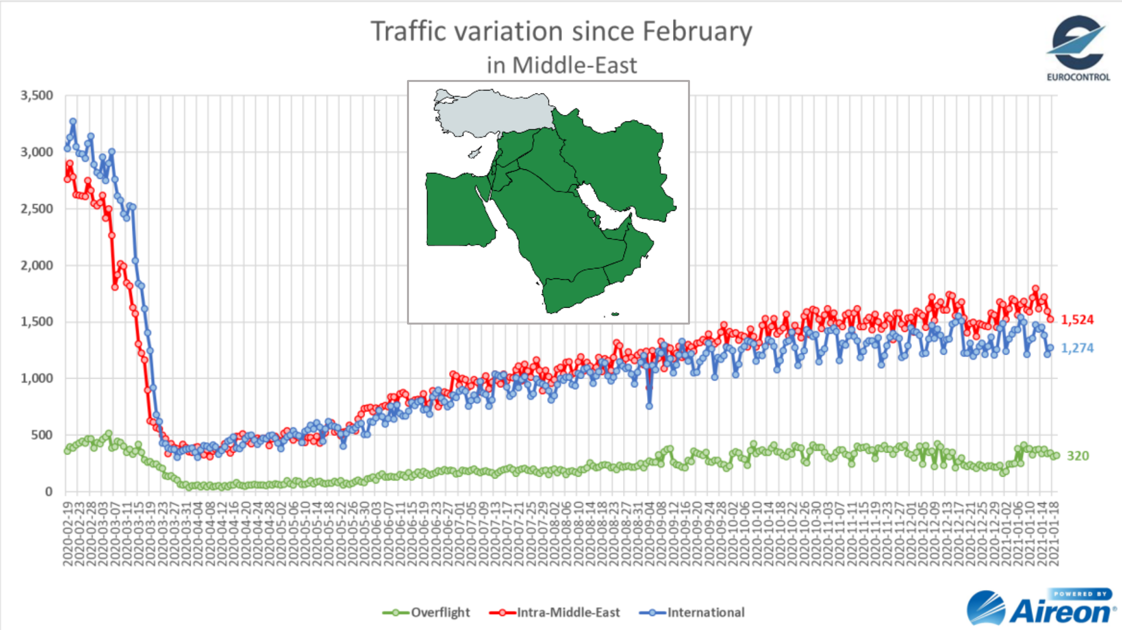
- **United-States (A4A members):**
  - A peak of COVID-19 cases was reached at the end of second week of January in the US. By the end of the third week, flights recorded further decline after the short blip during Christmas holidays. US domestic traffic is now down to -43% (vs 2019) on 19 January 2021. Latin American airports are the most popular gateways from/to US.
  - On 19 Jan, U.S. airlines passenger volumes were 64% below 2019 levels with Domestic down 64% and International down 67%.
  - The domestic U.S. Load Factor averaged 49% in most recent week, versus 80% a year earlier.



- **China:**
  - Chinese domestic flights show decreasing trend 9,363 flights (-21% compared to 1 Jan 2019) owing to rise in Covid-19 cases and tighter government controls (lockdown) since the beginning of the year, especially in the region of Beijing and Guangzhou. International flights have been stable too since March although slightly decreasing with 1,289 flights (-68% compared to 1 Jan 2019). The same is true for overflights with 514 flights (-68% compared to 1 Jan 2019).



- **Middle East:**
    - Intra-Middle-East traffic has recently stabilised around 1,500 daily flights, reaching 1,524 flights on 18 January (-45% compared to Feb 2019). International traffic is at 1,274 flights (-58% compared to Feb 2019). Overflights are recording 320 flights (-25% compared to Feb 2019).

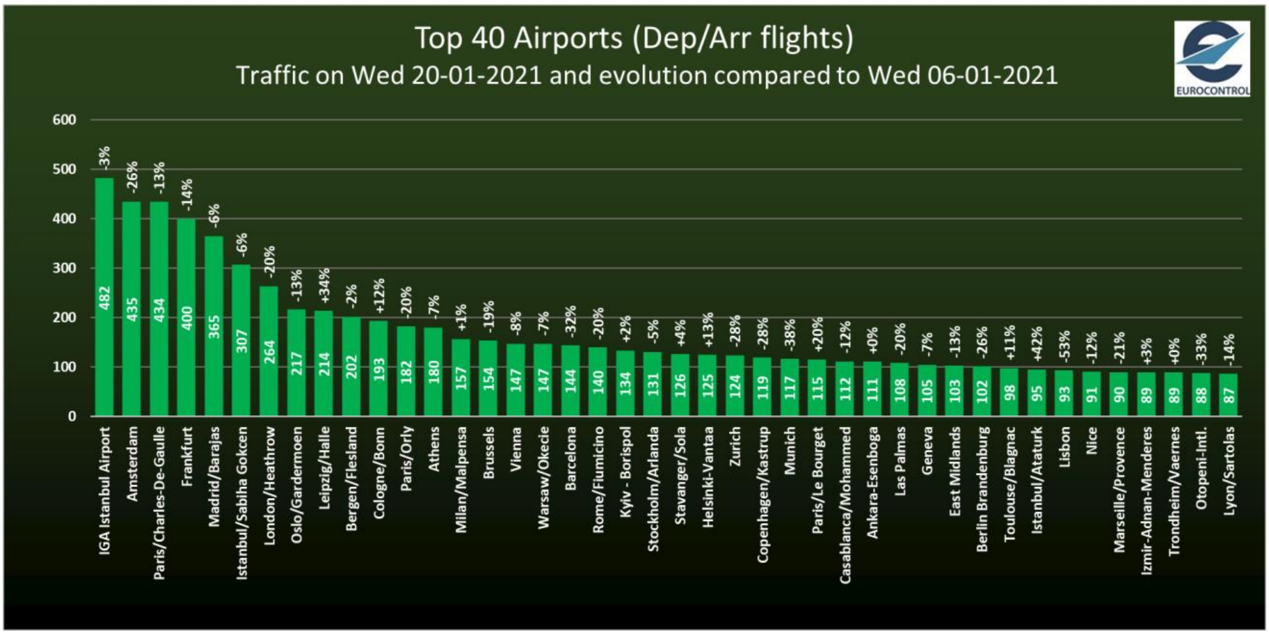


News for worldwide airlines, States and associations:

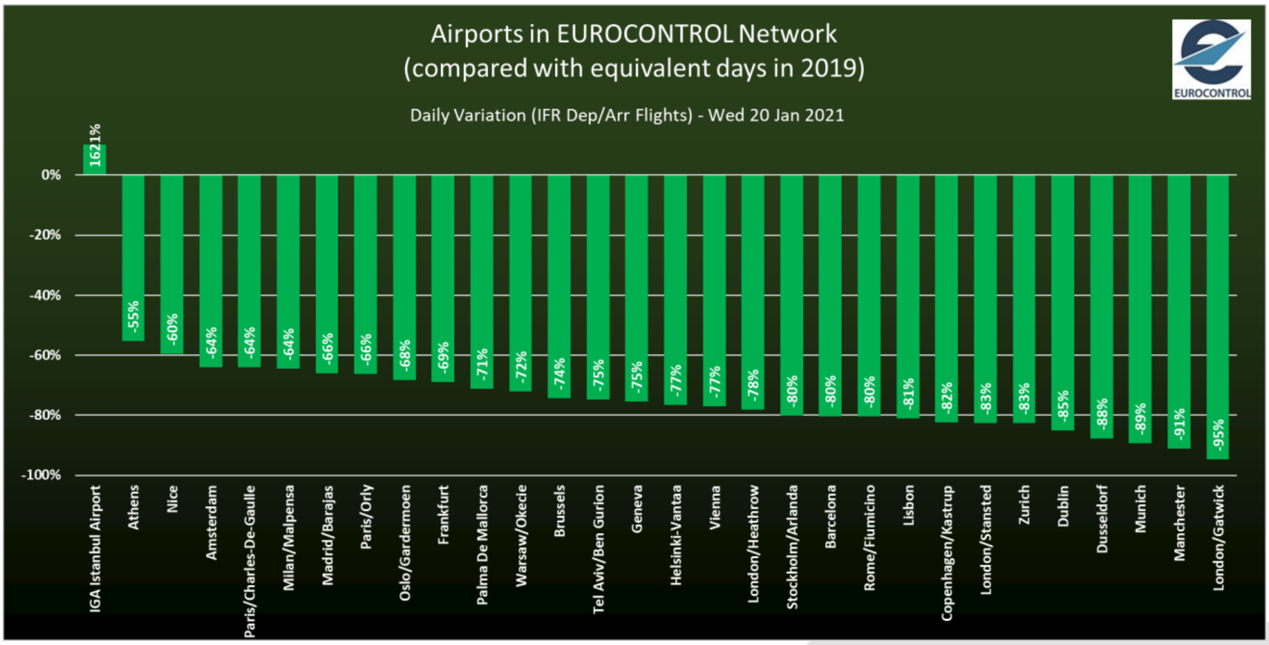
- **Air Canada** reducing first quarter capacity by an additional 25%, resulting in a workforce reduction of 1,700 employees.
- **Air New Zealand** announces it carried 8.4 million passengers in 2020, 17.6 million fewer than in 2019.
- **ANA** delaying the delivery of its first Boeing 777-9 from 2021 to 2023; further suspending 11,361 domestic frequencies between 19/1 and 2822.
- **Delta, American, United** and **Alaska** airlines temporarily banning checked in firearms on its Washington DC flights.
- **Emirates** rolling out a vaccination programme amongst its workforce, focusing on frontline employees.
- **IATA** expecting to start rolling out the Travel Pass mobile app for coronavirus test and vaccine data. **Emirates** will trial this from April.
- **Japan** tightening border restrictions by temporarily banning the entry of visitors from all countries.
- **Qantas CEO** reports a very rapid recovery in domestic network, with confidence that it would achieve more than 80% of pre-coronavirus traffic.
- **Qatar Airways CEO** expects a return to 2019 traffic levels in 2024; will continue to expand its cargo fleet.
- **Singapore Airlines** resuming three times a week service to Moscow.
- **Singapore** opens a vaccination centre at a Changi terminal with suspended operations; Transport Minister urges Singapore Airlines employees to get vaccinated.

4. Airport Information

- **İGA Istanbul Airport** was the busiest airport with 482 Dep/Arr flights on 20 January (-3% over 2 weeks) followed by **Amsterdam** (435, -26%), **Paris CDG** (434, -13%), **Frankfurt** (400, -14%), **Madrid** (365, -6%), **Istanbul/Sabiha** (307, -6%), **London/Heathrow** (264, -20%), and **Oslo** (217, -13%).
- From the top 8 airports, **all airports showed a decrease** over 2 weeks: **Amsterdam** (-26%), **London/Heathrow** (-20%), **Frankfurt** (-14%), **Paris CDG** (-13%), **Oslo** (-13%), **Madrid** (-6%) and **Istanbul/Sabiha** (-6%). Only **Leipzig** (+34%) and **Cologne/Bonn** (+12%) showed an increase.



- Compared to 2019, Amsterdam operated at -64% on 20 January, Paris CDG (-64%), Madrid (-66%), Oslo (-68%), Frankfurt (-69%) and London Heathrow (-78%). [*Please note: İGA Istanbul Airport was not in operation in January 2019 and therefore the comparison is meaningless.]

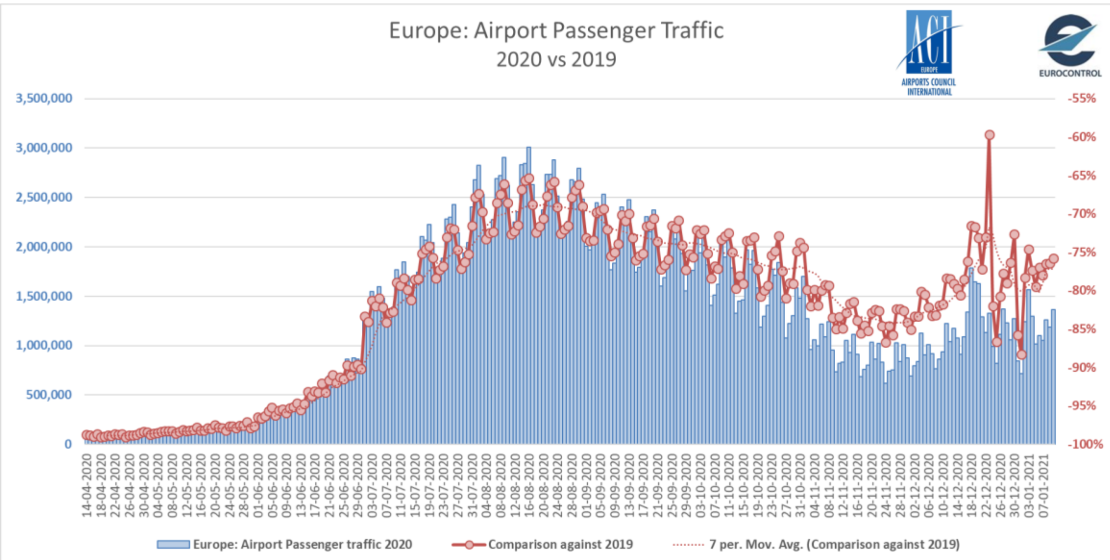


News from European and worldwide airports:

- **Barcelona Airport r**eports passenger numbers down 85% in December and 76% down for 2020.
- **Brussels Airport** reports passenger numbers down 82% in December and 74% down for 2020; hosting a vaccination centre in its Skyhall transit centre.
- **Copenhagen Airport** reports passenger numbers down 88% in December and 75% down for 2020.
- **Frankfurt Airport** reports passenger numbers down 82% in December and 73% down for 2020.
- **Helsinki Airport** bringing forward its renovation of terminal T2 by one year.
- **Leipzig/Halle Airport** achieves record cargo volumes in 2020 (up 11.7%) with Q4 up 35%.
- **Madrid Airport** reports passenger numbers down 80% in December and 72% down for 2020.
- **Munich Airport** commissions new 24,000m^2 logistics facility; passenger numbers down 93% in December and 77% for 2020.
- **Paris CDG/Orly Airports** report passenger numbers down 80%/64% in December and 71%/66% down for 2020.
- **Zurich Airport** reports passenger numbers down 85% in December and 74% down for 2020.

Passengers:

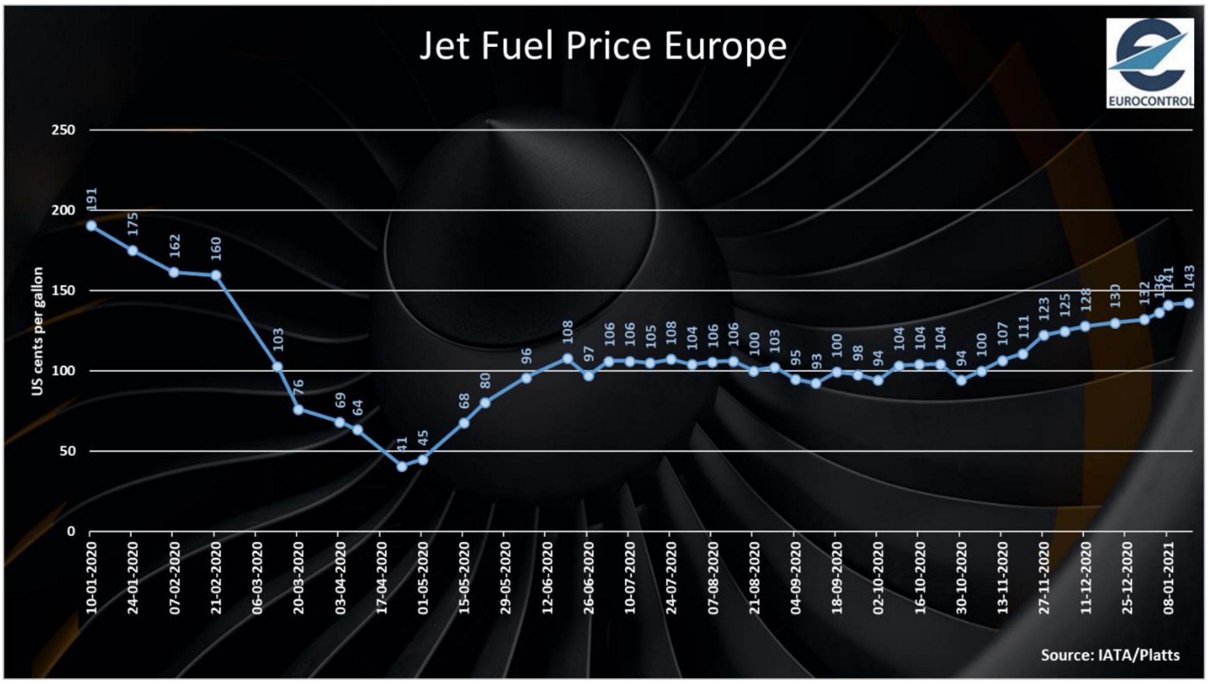
- According to **ACI**, passenger traffic has recorded -79% during the month of December 2020 (vs December 2019), despite big variations due to calendar effects[3]. The first 11 days of 2021 (vs 2020) recorded a similar decline of -78%.



5. Other factors

- **Fuel Price:** Jet fuel prices have started to rise since November, reaching 143 cts/gal on 15 January.

[3] Comparison is based on the same day of the week between the two years and leads to distorted values for public holidays.



To further assist you in your analysis, EUROCONTROL provides the following additional information on a daily basis (<u>daily updates at approximately 7:00 CET for the first item and 12:00 CET for the second</u>) 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.