COVID19 Impact on European Air Traffic
EUROCONTROL Comprehensive Assessment

Thursday, 4 February 2021

HEADLINES:

- 8,991 flights on 3 February (-2% over 2 weeks) or just 34% of 2019 levels.
- 7-day rolling average was -66% of 2019 and February traffic is likely to decline due to new (stricter) travel restrictions imposed by States on non-essential travel.
- Cargo increasing: 4 freight aircraft operators in the top 20 (DHL, Qatar, TNT and FedEX)
- Sharp decrease of Chinese domestic flights due to COVID resurgence.

Traffic Situation & Airlines Recovery

- **January 2021 was -64% compared January 2019**, close to the scenario published by EUROCONTROL in September 2020. **Over the first 3 days of February, traffic is -64% above the same period in 2019 and -66% rolling average for the last 7 days**. February traffic is likely to decline due to the latest waves of COVID and new (stricter) travel restrictions imposed by States on non-essential travel.
- **Turkish Airlines** had the highest number of flights on Wed 3 Feb (579 flights, +3% over 2 weeks with +19 flights), followed by **Air France** (385 flights, +6%, +21 flights), **Widerøe** (321, +1%, +4), **DHL Express** (281, +2%, +6), **Pegasus** (249, +12%, +27), **KLM** (181, -25%, -61), **Lufthansa** (174, -15%, -30), **Qatar** (172, -2%, -4), **SAS** (128, -22%, -36), **Iberia** (126, -10%, -14), **Bristow Norway** (121, -8%, -10) and **TNT International** (111, +363%, +87). Yesterday, **BA was** ranked **15th** (with 87 flights, +5%), **Ryanair was 17th** (83, +24%), **easyJet was 38th** (45, +22%) and **Wizz Air was 59th** (27, +35%).
- Over 2 weeks, the **airlines which decreased the most** their **capacity**, were **KLM** (-61 flights, -25%), **SAS** (-36, -22%), **Lufthansa** (-30, -15%), **Iberia** (-14, -10%). **Airlines which increased the most** were **TNT International** (+87, +363%), **Pegasus** (+27, +12%), **Wizz Air** (+27, +35%), **Air France** (+21, +6%), **Turkish Airlines** (+19, +3%), **Ryanair** (+16, +24%) and **Federal Express** (+11, +16%).
- Compared to 2019, Widerøe operated at -10%, Pegasus (-40%), Turkish Airlines (-53%), Air Nostrum (-60%), Iberia (-64%), Air France (-65%), KLM (-72%), Lufthansa (-88%), BA (-90%), Ryanair (-95%) and easyJet (-96%).
- For States, **France** had the highest number of dep/arr flights yesterday (1,493 flights, -1% over 2 weeks) followed by **Germany** (1,428, -8%), **Turkey** (1,088, +2%), **Spain** (907, -1%), **the UK** (871, +4%), **Norway** (767, -7%), **Italy** (666, +4%) and **the Netherlands** (456, -12%).
- Compared to 2019, Norway was at -49% (in terms of dep/arr flights), Turkey (-49%), France (-60%), the Netherlands (-68%), Spain (-73%), Germany (-73%), Italy (-76%) and the UK (-82%).
- **Market segments: all-cargo** is the only segment consistently growing since beginning of January reaching +10% vs 2019, **Business Aviation** is at -25%, **Charter** at -9%, **Traditional** at -71% and **Low-Cost** at -87%.

Traffic Flows & Country Pairs

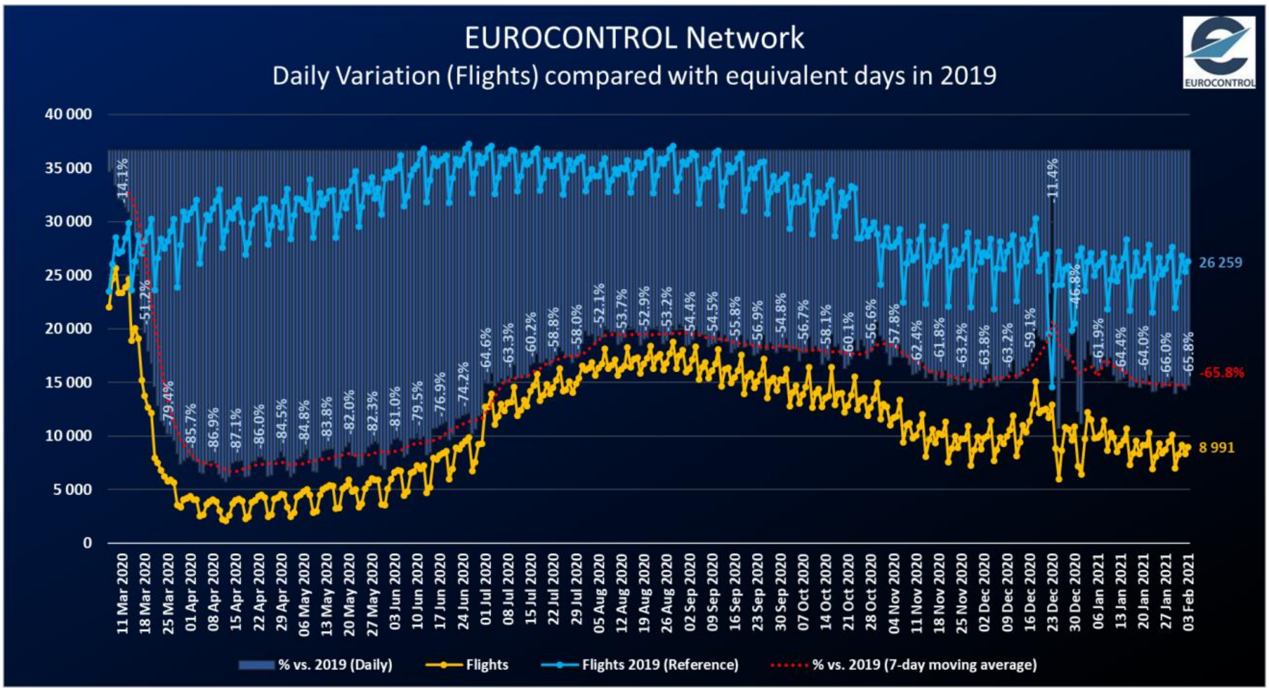
- **The intra-Europe flow is the main flow** with 6,558 flights on 3 Feb (-1% over 2 weeks). Intra-Europe flights are at -68% compared to 2019 while all other flows are at -58%.
- **Top traffic flows with Europe** are with **"Middle-East"** (495 flights, -3%) followed by **"Asia/Pacific"** (428 flights, +9%), **"North-Atlantic"** (375 flights, +3%), **"North-Africa"** (243 flights, -14%).
- **Sharp decrease of Chinese domestic flights reaching 5,960 flights (i.e. -47% vs 2019)**.
- The highest domestic flows are within **France** (731 flights, -1% over 2 weeks), **Norway** (634, -2%), **Turkey** (520, +4%), **Spain** (455, +2%), **UK** (300, +28%), **Germany** (290, -28%), **Italy** (263, +2%) and **Greece** (173, +5%).
- The **biggest decreases** over 2 weeks were recorded for **Germany** (-28%) and **Norway** (-2%). The highest increases were for **UK** (+28%) and **Turkey** (+4%).

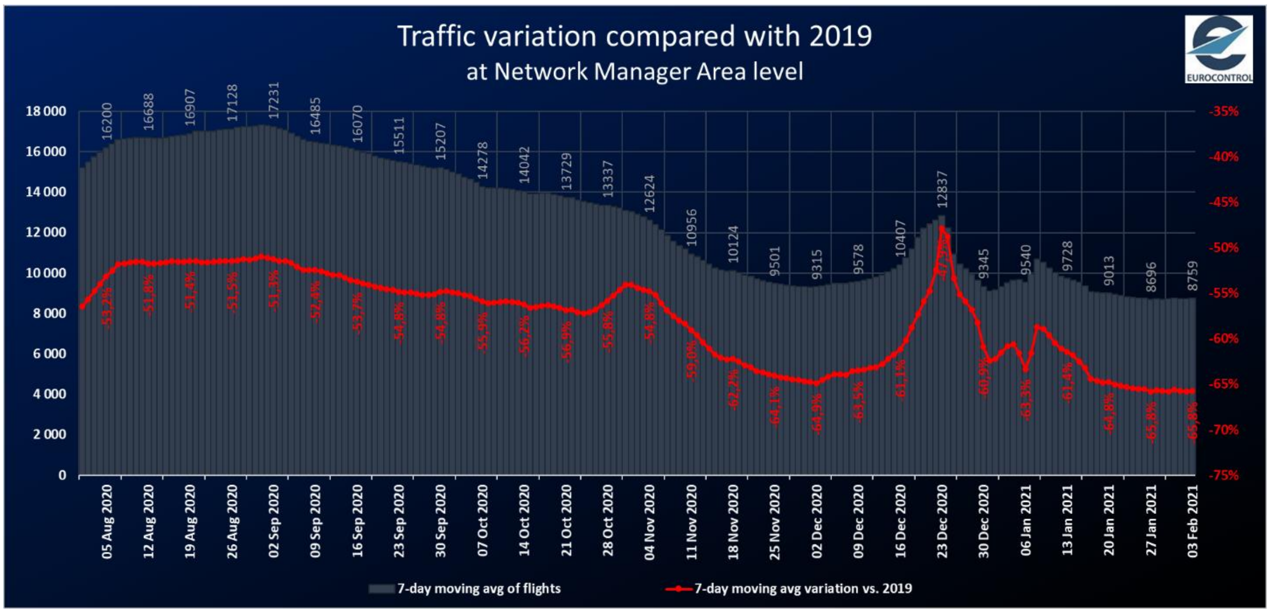
Airports

- **İGA Istanbul Airport** was the busiest airport on 3 February with 492 Dep/Arr flights (+2% over 2 weeks) followed by **Paris CDG** (447, +3%), **Frankfurt** (373, -7%), **Amsterdam** (364, -16%), **Istanbul/Sabiha** (344, +12%), **Madrid** (336, -8%), **London/Heathrow** (275, +4%), **Leipzig/Halle** (215, -1%), **Bergen** (197, -2%), **Oslo** (193, -11%) and **Cologne/Bonn** (191, -1%).
- **Half of the 10 top airports showed a decrease** over 2 weeks: **Amsterdam** (-16%), **Oslo** (-11%), **Madrid** (-8%) and **Frankfurt** (-7%). **The other half showed an increase** like **Istanbul/Sabiha** (+12%), **London/Heathrow** (+4%), **Paris CDG** (+3%) and **İGA Istanbul Airport** (+2%).

1. Traffic Situation and Airlines Recovery

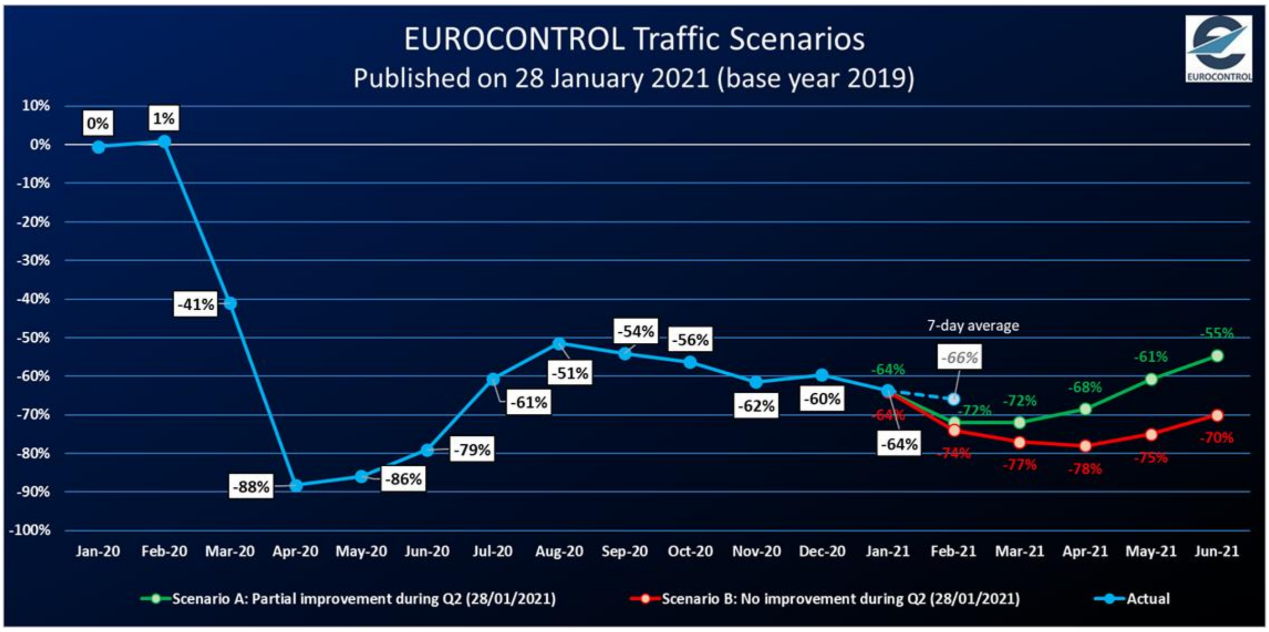
- The network recorded 8,991 flights on Wednesday 3 February (-2% with -166 flights compared to Wednesday 20 January). This is 34% of 2019 traffic levels. Based on a 7-day moving average, the decrease is -65.8% compared to 2019.





Overall situation against EUROCONTROL traffic scenarios:

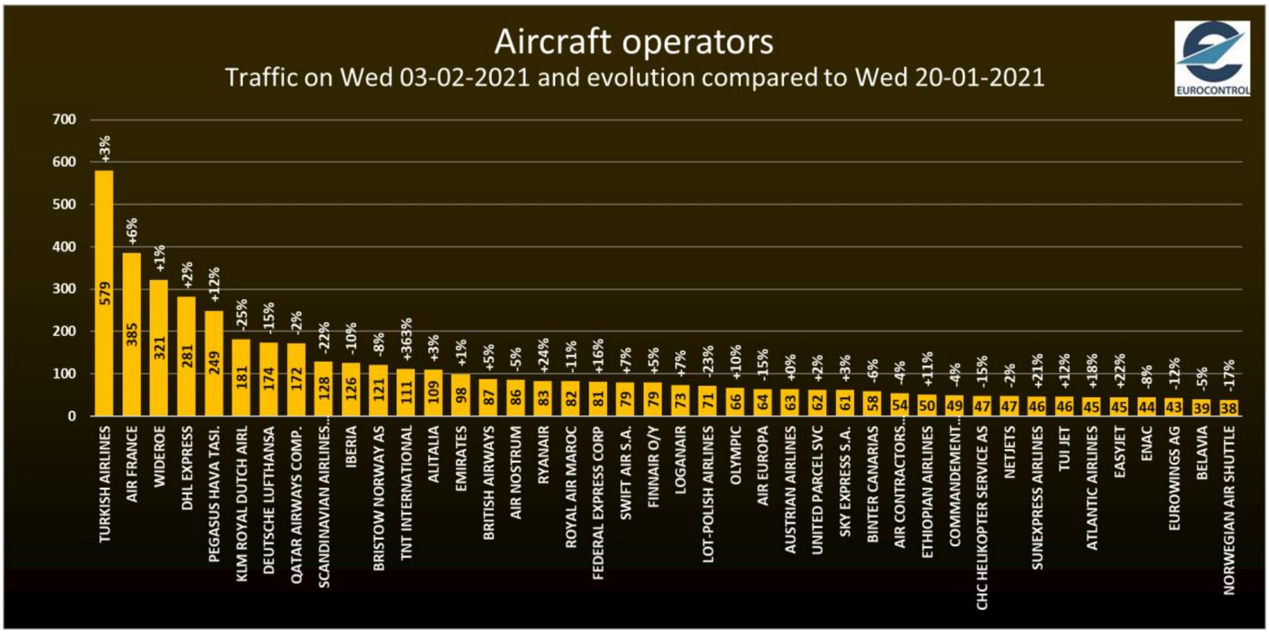
- **Over the first 3 days of February, traffic is -64% compared to the same days in 2019, and -66% rolling average for the last 7 days** (as depicted in the chart below).
- This is for the time being above the latest EUROCONTROL traffic scenarios published on 28 January 2021. However, February traffic is likely to decline due to the latest waves of COVID, the risks associated with new variants and new (stricter) travel restrictions imposed by States on non-essential travel.



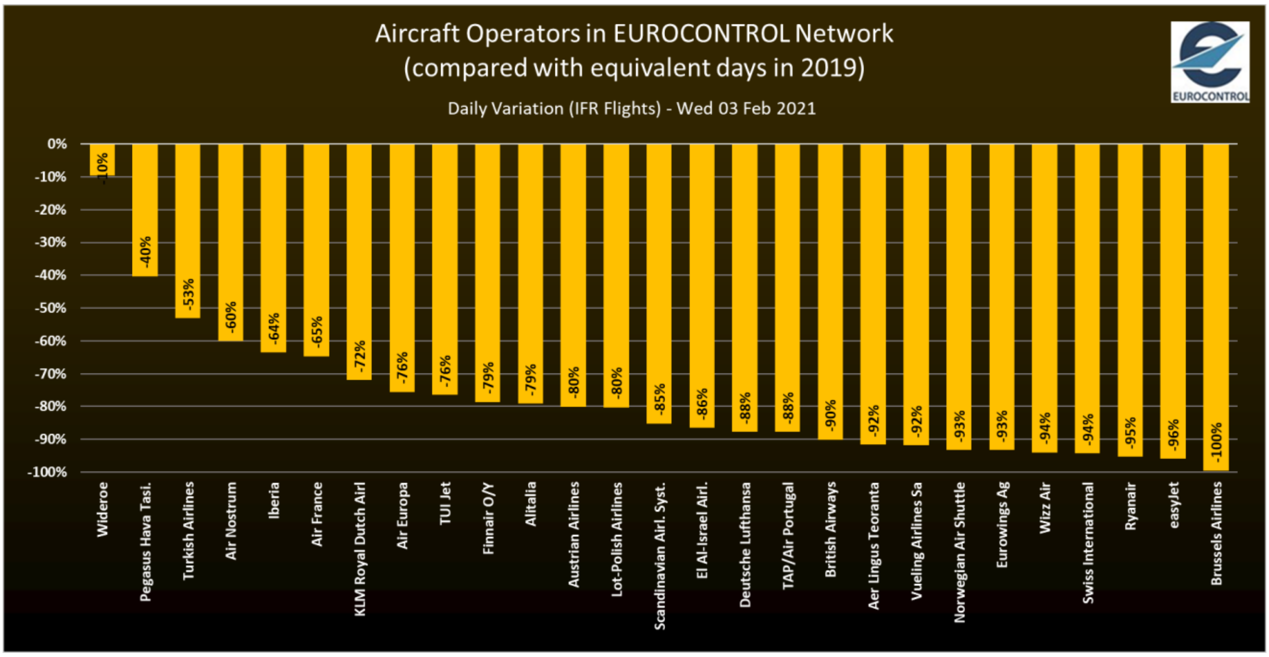
European Airlines:

- **Turkish Airlines** was the airline with the highest number of flights (579 flights) on Wednesday 3 February slightly increasing by +3% compared to Wednesday 20 January (+19 flights), followed by **Air France** (385 flights, +6%, +21 flights), **Widerøe** (321, +1%, +4), **DHL Express** (281, +2%, +6), **Pegasus** (249, +12%, +27), **KLM** (181, -25%, -61), **Lufthansa** (174, -15%, -30), **Qatar** (172, -2%, -4), **SAS** (128, -22%, -36), **Iberia** (126, -10%, -14), **Bristow Norway** (121, -8%, -10) and **TNT International** (111, +363%, +87). Yesterday, **British Airways was** ranked **15th** (with 87 flights, +5%), **Ryanair was 17th** (83 flights, +24%), **easyJet was 38th** (45 flights, +22%) and **Wizz Air was 59th** (27 flights, +35%).

- Compared to two weeks ago, the **airlines which decreased the most** their **capacity**, were **KLM** (-61 flights, -25%), **SAS** (-36, -22%), **Lufthansa** (-30, -15%), **Iberia** (-14, -10%). **Airlines which increased the most** were **TNT International** (+87, +363%), **Pegasus** (+27, +12%), **Wizz Air** (+27, +35%), **Air France** (+21, +6%), **Turkish Airlines** (+19, +3%), **Ryanair** (+16, +24%) and **Federal Express** (+11, +16%).



- Compared to 2019, Widerøe operated at -10% on Wednesday 3 February followed by Pegasus (-40%), Turkish Airlines (-53%), Air Nostrum (-60%), Iberia (-64%), Air France (-65%), KLM (-72%), Lufthansa (-88%), British Airways (-90%), Ryanair (-95%) and easyJet (-96%).



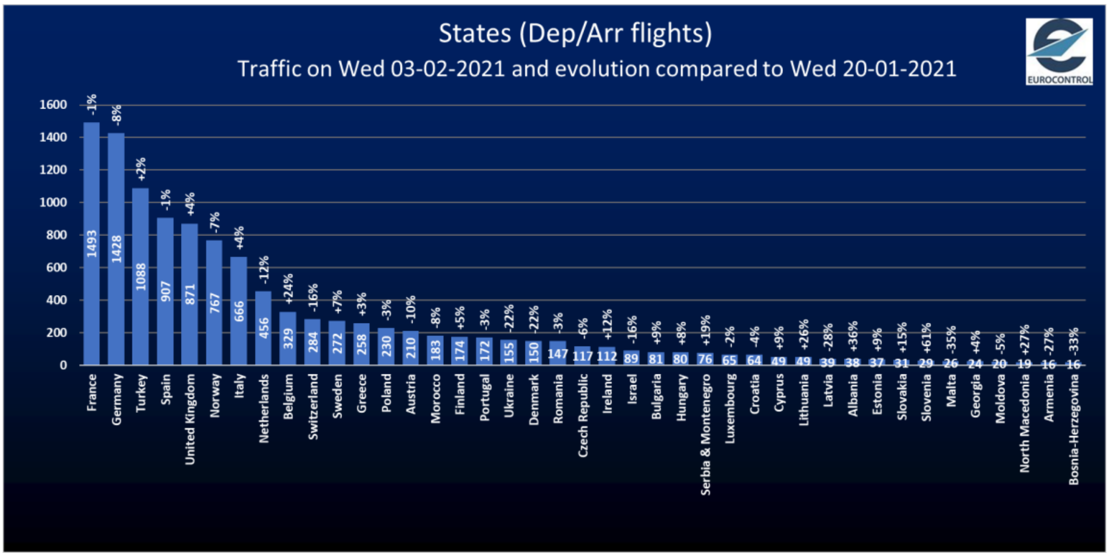
News from key European airlines:

- **easyJet** expects to operate no more than 10% of 2019 capacity in Q1 of 2021; launches new fare class "Standard Plus".
- **Norwegian** outlines details of its post-examinership plan, targeting an overall reduction in debt to €1.9 billion; aims to operate a narrow body fleet of 68 aircraft in 2022.
- **Ryanair** expresses an interest in participating in any tender that might occur for Alitalia's Milan Linate and Rome Fiumicino slots; reports an operating loss for the last quarter of 2020 of €306 million and cash at 31/12/20 of €3.5 billion; pax numbers for January were 88% down on Jan 2020.
- **SWISS** reducing its Geneva operations to 'an absolute minimum', utilising feeder services to Zurich & Frankfurt; overall, its February services will be some 10% of those in 2019.

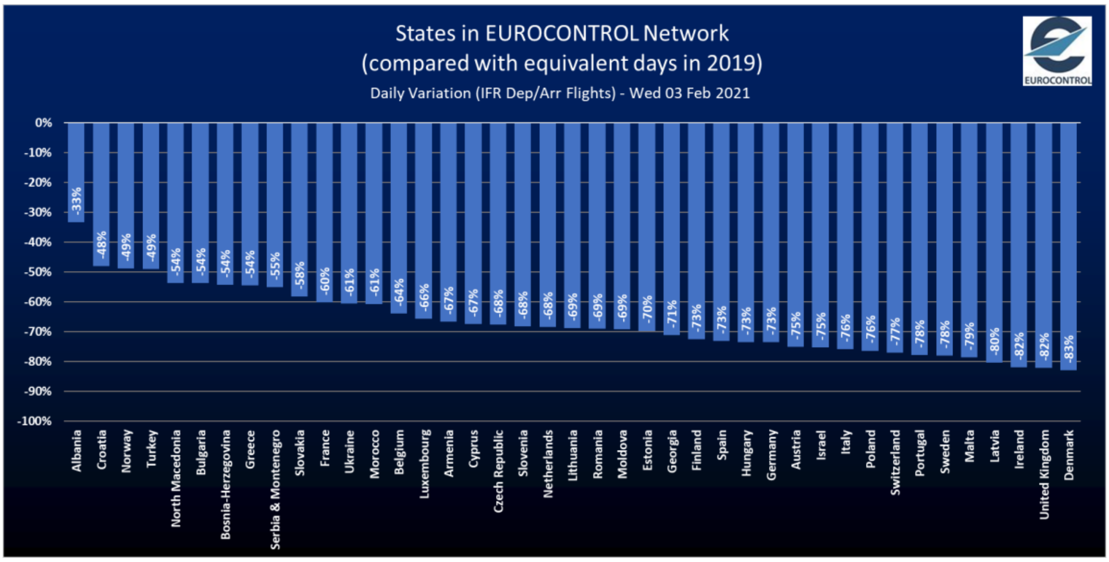
- **SAS** reports that in 2020 approx. 90% of staff were temporarily laid off and there were 5,000 redundancies; its net loss was SEK 9,275 million; states that its liquidity position is sufficient for at least the next 12 month period.
- **TAP** suspends 93% of operations in February (compared to Feb 2020), an increase from the 73 % already envisaged.
- **TUI Group** completes a capital increase (rights issue) of €509 million.

States

- The top 8 busiest states[1] remained stable. **France** was the State with the highest number of dep/arr flights with 1,493 flights on Wednesday 3 February (-1% over 2 weeks) followed by **Germany** (1,428, -8%), **Turkey** (1,088, +2%), **Spain** (907, -1%), **the UK** (871, +4%), **Norway** (767, -7%), **Italy** (666, +4%) and **the Netherlands** (456, -12%).



- Compared to 2019, Departure/Arrival traffic on Wednesday 3 February for the top 8 States was: Norway (-49%), Turkey (-49%), France (-60%), the Netherlands (-68%), Spain (-73%), Germany (-73%), Italy (-76%) and the UK (-82%).



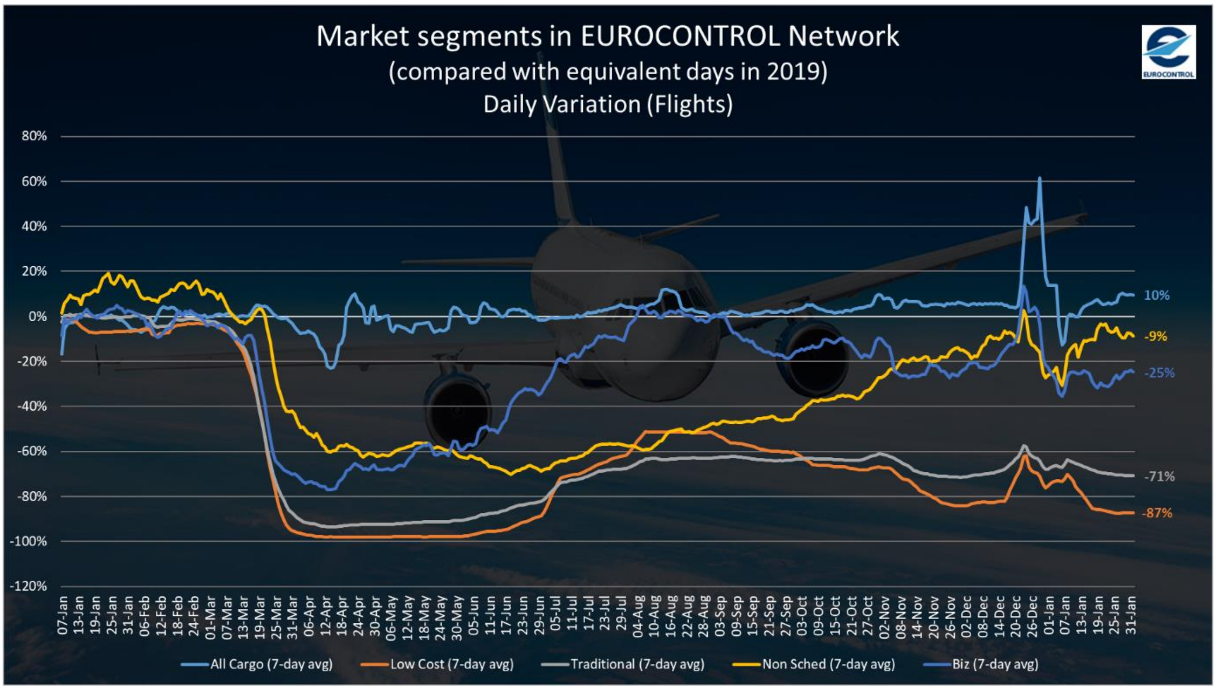
[1] excluding overflights.

News from States and industry:

- **Belgium** bans non-essential travel until 1 March.
- **Rolls-Royce** expects 2021 widebody flying hours to be about 55% of 2019 levels (forecast last October was 70%).
- **Boeing** reports a ‘core operating loss’ of $14.2 billion in 2020; expects to increase 737 production to 31/month in early 2022; consolidating 787 final assembly in South Carolina (5/month); pushing back first 737 MAX 10 delivery to 2023.
- **ENAIRE** board approves a €127 million investment plan for 2021, focusing on digitalisation of ATM systems, airspace restructuring and new operational concept.

Market Segments:

- After the blip over Christmas[2] break, and since the beginning of January 2021:
  - **All-cargo,** is the only segment consistently growing, recording recent jump of **+10%** (vs 2019).
  - **Charter** and **Business Aviation** returned to their pre-Christmas rates with, respectively, **-9%** and **-25%** (vs 2019).
  - **Traditional** and **Low-Cost,** while accounting the majority of flights (respectively 49% and 26% of all flights in 2020), record constant declines since early January. Recent days showed they are down to **-71%** and **-87%** respectively (vs 2019). The reinstated travel restrictions across Europe from late January are expected to result in larger decline rates in February.



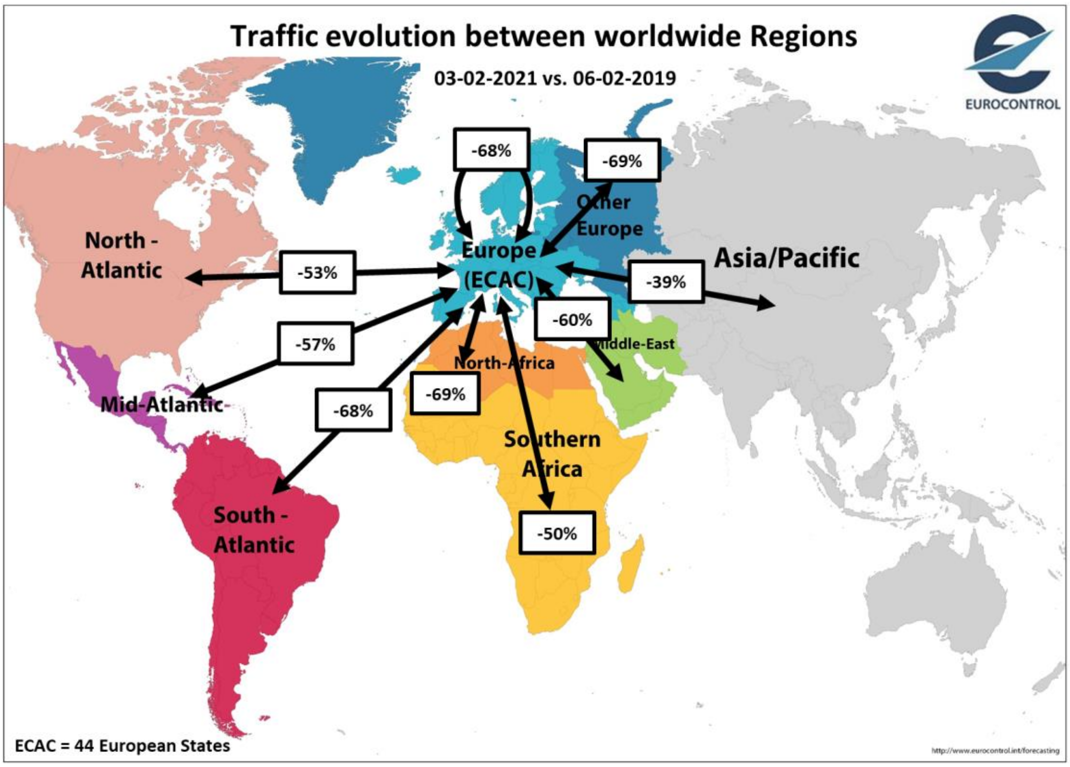
2. Traffic Flows & Country Pairs

- The main traffic flow is the intra-Europe flow with 6,558 flights on Wednesday 3 February, which is decreasing (-1%) over 2 weeks.
- The top traffic flows with Europe were with “Middle-East” (482 flights, -5%) followed by “Asia/Pacific” (428 flights, +9%), “North-Atlantic” (375 flights, +3%), “North-Africa” (243 flights, -14%) and “Other Europe” (221 flights, -6%).

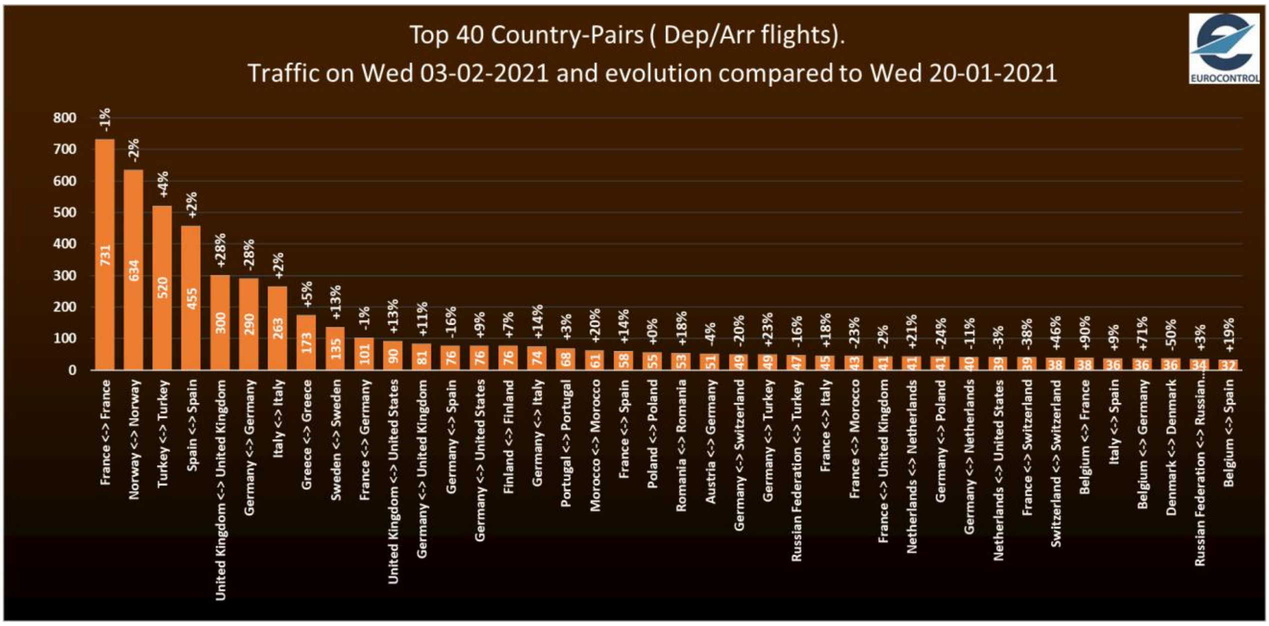
[2] All segments show an artificial blip on 23 Dec 2020 as comparable day was Christmas day in 2019.

- Intra-Europe flights are at -68% compared to 2019 while intercontinental flows are at -58%.

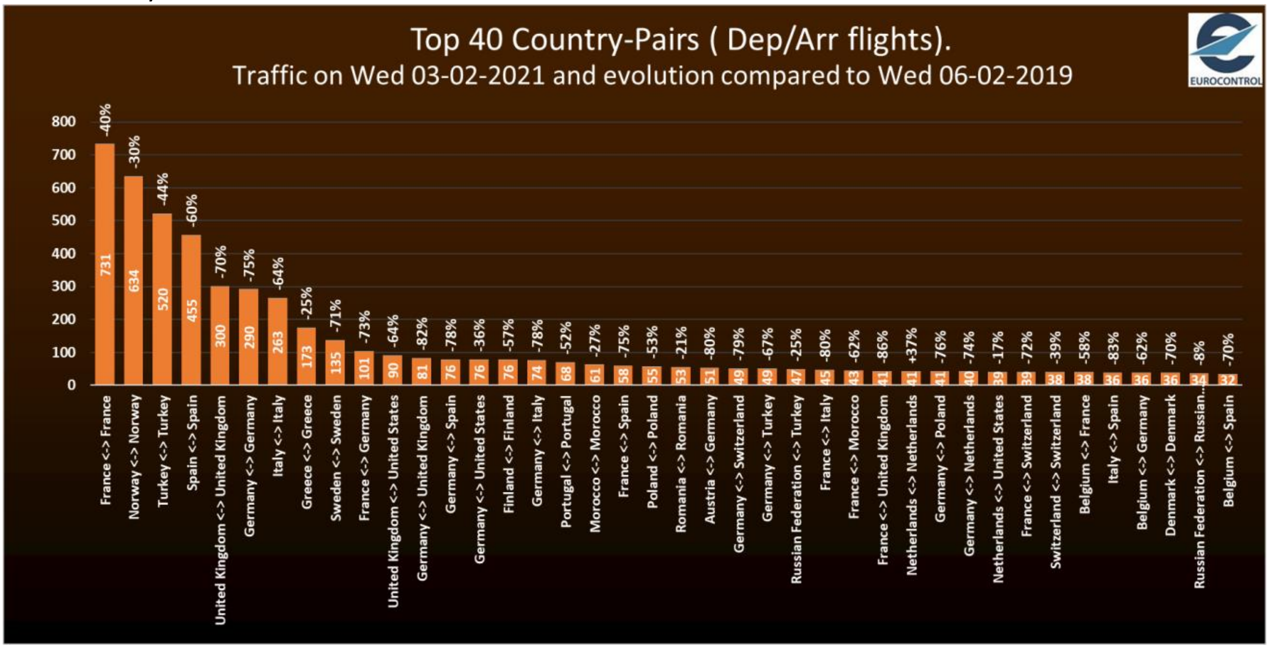
REGION	20-01-2021	03-02-2021	%	vs. 2019
Intra-Europe	**6 647**	**6 558**	***-1%***	***-68%***
Europe<->Asia/Pacific	391	428	*+9%*	*-39%*
Europe<->Mid-Atlantic	85	78	*-8%*	*-57%*
Europe<->Middle-East	510	482	*-5%*	*-60%*
Europe<->North Atlantic	363	375	*+3%*	*-53%*
Europe<->North-Africa	283	243	*-14%*	*-69%*
Europe<->Other Europe	236	221	*-6%*	*-69%*
Europe<->South-Atlantic	69	55	*-20%*	*-68%*
Europe<->Southern Africa	162	161	*-1%*	*-50%*
Non Intra-Europe	**2 099**	**2 043**	***-3%***	***-58%***



- **Domestic flows are the most active** flows (i.e. 9 of the top 10 flows are domestic). The highest domestic flows were within **France** (731 flights, -1% over 2 weeks), **Norway** (634, -2%), **Turkey** (520, +4%), **Spain** (455, +2%), **UK** (300, +28%), **Germany** (290, -28%), **Italy** (263, +2%), **Greece** (173, +5%) and **Sweden** (135, +13%). The biggest decreases over 2 weeks were recorded for **Germany** (-28%) and **Norway** (-2%). The highest increases were for **UK** (+28%) and **Turkey** (+4%).
- The busiest non-domestic flows were **France-Germany** (101 flights), **UK-US** (90 flights), **Germany-UK** (81 flights) and **Germany-Spain** (76 flights).



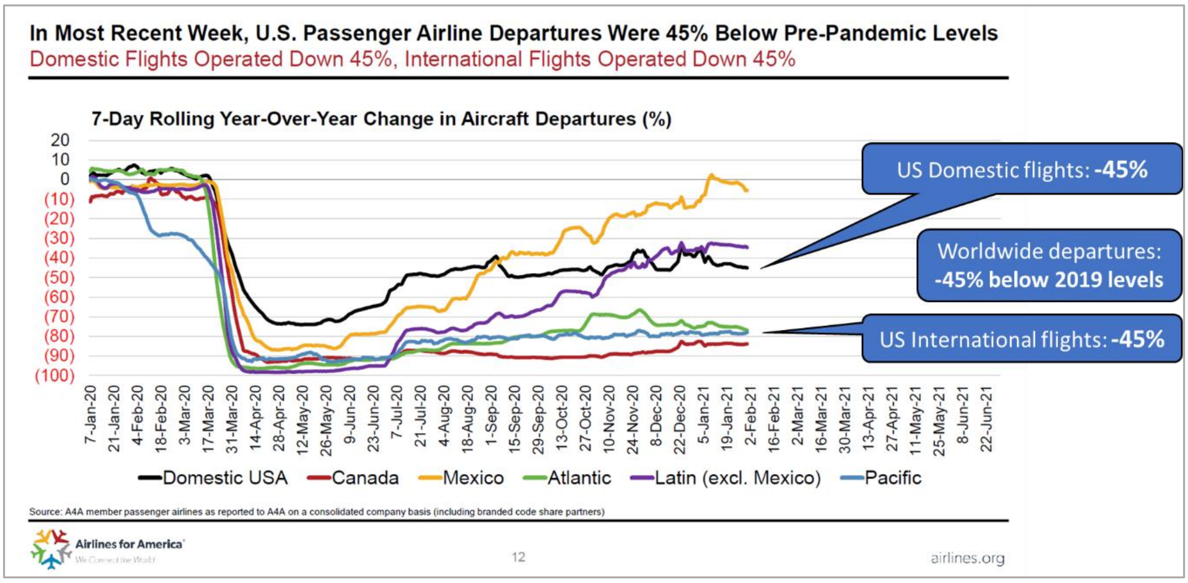
- Compared to 2019, the largest domestic flows on Wednesday 3 February were at -40% for France, -30% for Norway, -44% for Turkey, -60% for Spain, -70% for the UK, -75% for Germany, -64% for Italy and -25% for Greece.



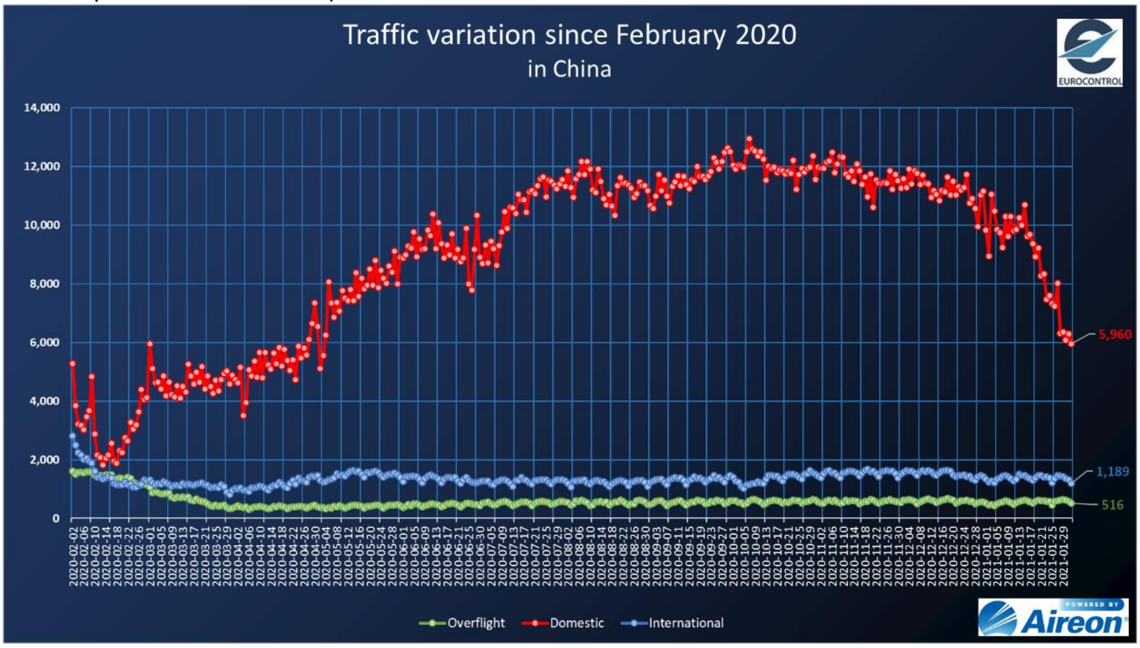
3. Situation outside Europe

- **United-States (A4A members):**
  - Peak in COVID-19 cases was reached early January in the US but declined steadily since (number of new cases). US domestic and International traffic recorded (each) -45% (vs 2019) on 2 February, 1pp lower than previous week.
  - On 2 February, U.S. airlines passenger volumes were 66% below 2019 levels with Domestic down 65% and International down 74% (-5 pp compared to last week).
  - The domestic U.S. Load Factor averaged 46% in most recent week, versus 75% a year earlier.

- Corporate air travel has yet to recover from the steep declines that began in March 2020. Last week of January 2021, US travel agencies recorded a 68% decline in tickets sold (all segments, vs same week in 2019). The corporate segment (alone) recorded an 86% decline over that same week.

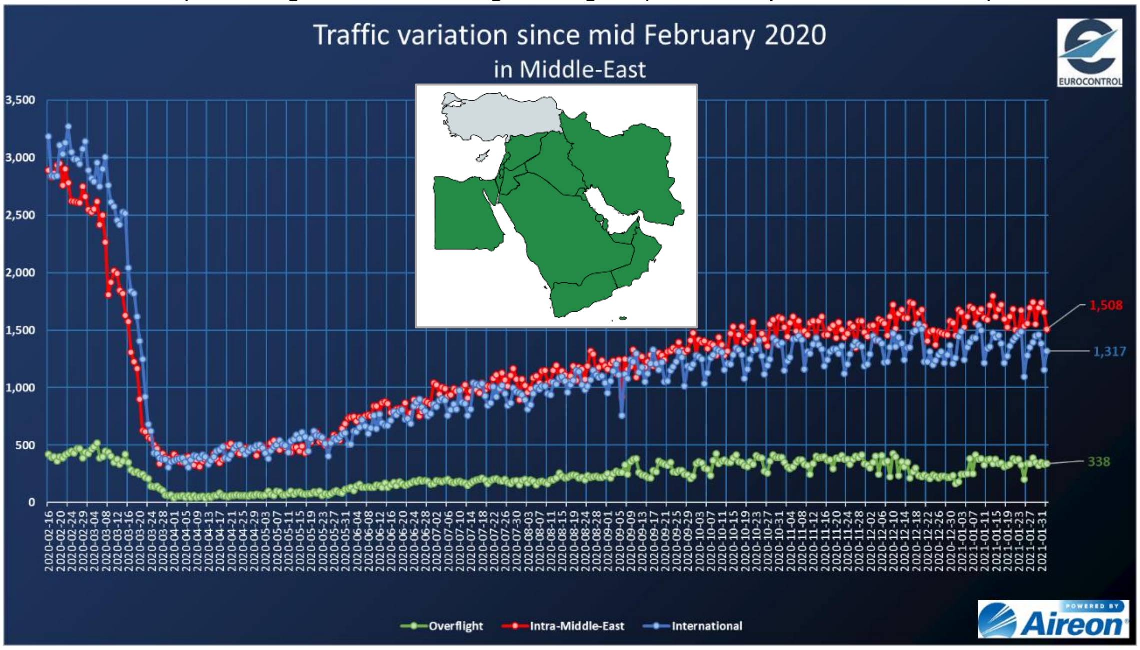


- **China:**
  - Chinese domestic flights continued to decline late January and recorded traffic levels just below 6,000 flights on 1 Feb (-47% compared to 1 Jan 2019) owing to a persistent resurgence of the virus rise, hence the implementation of a series of containment measures. Domestic traffic might continue to deteriorate as many employees (in state-owned companies, government agencies) have been told not to travel for the coming Lunar New Year holiday[3]. International flights have been stable since March although slightly decreasing with 1,189 flights (-68% compared to 1 Jan 2019). The same is true for overflights with 516 flights (-63% compared to 1 Jan 2019).



[3] The standard public holiday for (Mainland) Chinese is 7 days from Chinese New Year's Eve (i.e. Feb. 11 – 17, 2021)

- **Middle East:**
  - Intra-Middle-East traffic stabilised around 1,500 daily flights, recording 1,508 flights on 1 February (-47% compared to Feb 2019). International traffic is at 1,317 flights (-57% compared to Feb 2019). Overflights are recording 338 flights (-25% compared to Feb 2019).

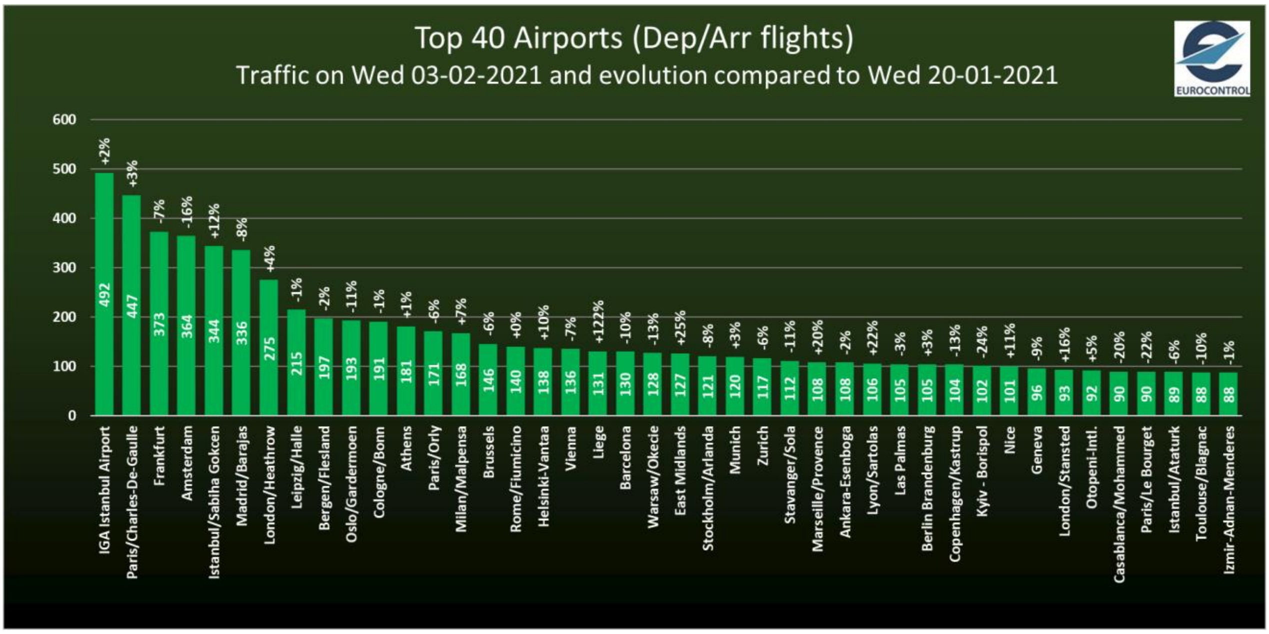


News for worldwide airlines:

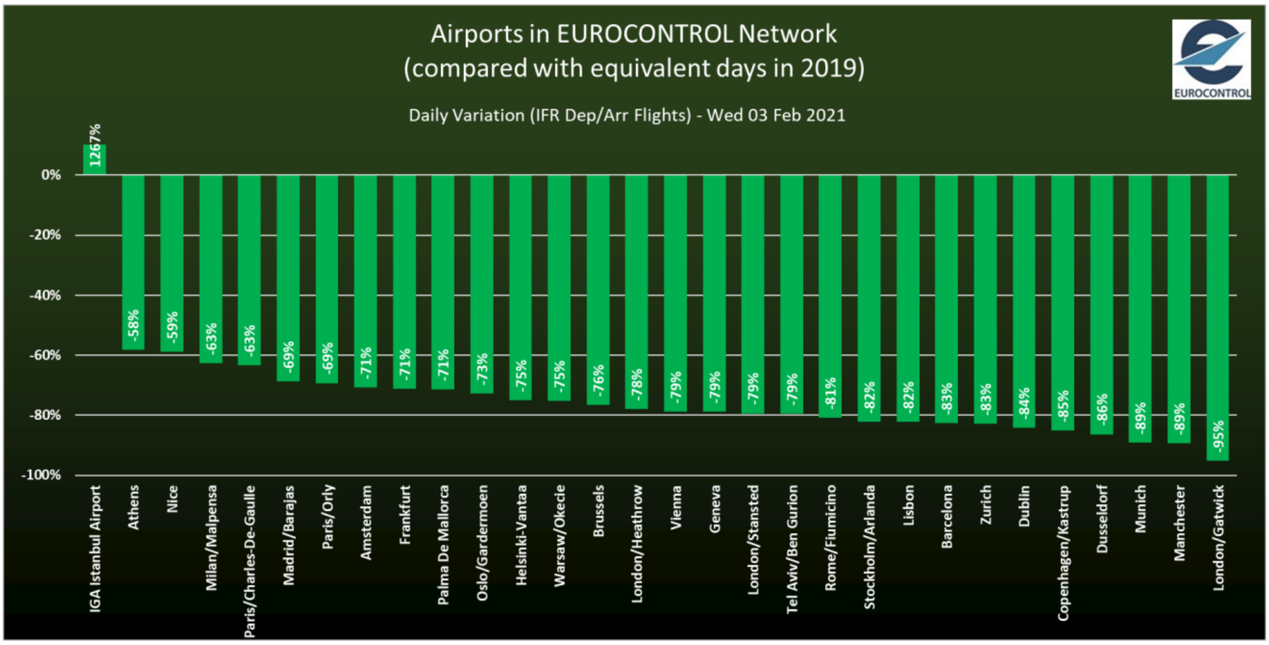
- **Aeroflot** extends its suspension of 88 international services until the end of April.
- **American Airlines** expects capacity to be down 45% in Q1 2021 (compared to Q1 2019); removed over 150 aircraft from its fleet in 2020; reports operating loss for 2020 of $10.4 billion; launches $882 million equity offering.
- **Cathay Pacific** to sell HK$6.7 billion of 5 year 2.75% convertible bonds.
- **JAL Group** reports passenger numbers down 93% (international) / 55% (domestic) in December; expects monthly cash burn of $238 million per month in Q1 2021.

4. Airport Information

- **İGA Istanbul Airport** was the busiest airport on Wednesday 3 February with 492 Dep/Arr flights (+2% over 2 weeks) followed by **Paris CDG** (447, +3%), **Frankfurt** (373, -7%), **Amsterdam** (364, -16%), **Istanbul/Sabiha** (344, +12%), **Madrid** (336, -8%), **London/Heathrow** (275, +4%), **Leipzig/Halle** (215, -1%), **Bergen** (197, -2%), **Oslo** (193, -11%) and **Cologne/Bonn** (191, -1%).
- **Half of the 10 top airports showed a decrease** over 2 weeks: **Amsterdam** (-16%), **Oslo** (-11%), **Madrid** (-8%) and **Frankfurt** (-7%). **The other half showed an increase** like **Istanbul/Sabiha** (+12%), **London/Heathrow** (+4%), **Paris CDG** (+3%) and **İGA Istanbul Airport** (+2%).



- Compared to 2019, Paris CDG operated at -63% on Wednesday 3 February, Madrid (-69%), Amsterdam (-71%), Frankfurt (-71%), Oslo (-73%) and London Heathrow (-78%). [*Please note: İGA Istanbul Airport was not in operation in January 2019 and therefore the comparison will be meaningless until mid-April.]

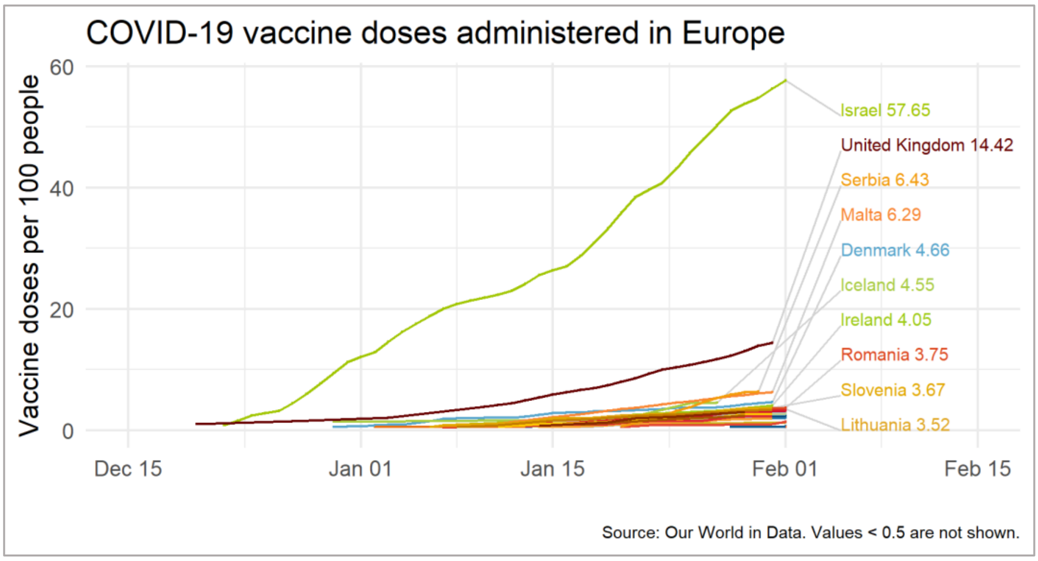


News from European and worldwide airports:

- **Munich Airport** introduces a new electric tug for aircraft up to 352 tonnes.
- **Berlin Brandenburg Airport** will temporarily close Terminal 5 (formerly Schönefeld) from 23 February for a year and will not yet commission Terminal 2.
- **Tokyo Narita Airport** reports passenger number down 76% in 2020 (domestic -58%, international -80%); in December passenger numbers were down 90% (-65%/-95%).
- **Amsterdam Schiphol Airport** begins trials of an autonomous baggage tractor.
- **London Heathrow** launching rapid testing (lateral flow) pilot scheme for staff.

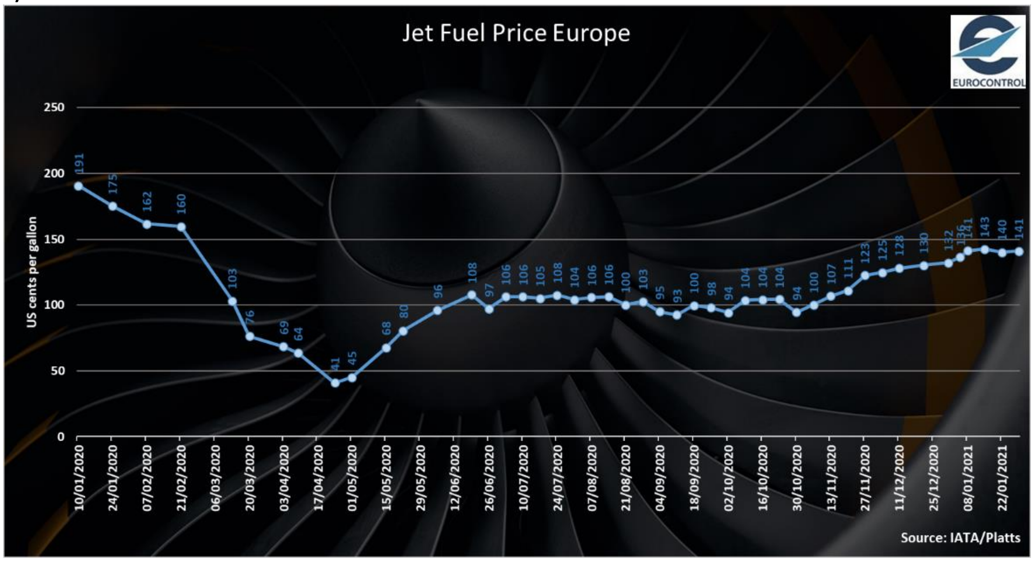
5. Other facts and factors:

- **Vaccination:** inoculations against COVID-19 have started at the end of 2020 as shown with the daily number of COVID-19 vaccination doses administered *per 100 people* graph below. Except for Israel and UK, most of the States reported fewer than 5% of people have received even one dose.



***Notes:** rolling seven-day average shown for EUROCONTROL Member States. This is counted as a single dose, and may not equal the total number of people vaccinated, depending on the specific dose regime (e.g. people receive multiple doses).*

- **2021 outlook: IATA**[4] added a "COVID-19 variant" scenario in its most recent outlook for 2021, estimating that RPK might only average 38% of the 2019 levels at the end of the year. This scenario is a significant downwards risk, compared to the December forecast, that RPK path further deteriorates depending on new variants and policy response.
- **Fuel Price:** Jet fuel prices have been stable since the beginning of 2021, reaching 141 cts/gal on 29 January.



[4] Update dated 3 February 2021

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.