COVID 19 Impact on European Aviation
EUROCONTROL Comprehensive Assessment

Friday, 19 February 2021

HEADLINES:
- 9,641 flights on Thursday 18 February or 34% of 2019 levels.
- 7-day rolling average was -67% of 2019. February traffic is stabilizing.
- Cargo increasing (+13% Vs 2019) with 4 freight aircraft operators in the top 20.
- Domestic traffic vs 2019: Intra-Europe (-67%), China (-36%), US (-45%).

Traffic Situation & Airlines Recovery
- Over the first 18 days of February, traffic is -66% compared to the same days in 2019. This is above the latest EUROCONTROL traffic scenarios dated 28 Jan 2021, mainly due to a very active cargo traffic as well as slightly higher operations for larger airlines than anticipated (Note that a significant proportion of flight operations for some of the largest airlines are actually non-commercial, i.e. training flights to maintain pilot ratings).
- Aircraft Operators:

<table>
<thead>
<tr>
<th>Aircraft Operator</th>
<th>Dep/Arr Flights</th>
<th>% over 2 weeks</th>
<th>% vs 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>TURKISH AIRLINES</td>
<td>816</td>
<td>+2%</td>
<td>-51%</td>
</tr>
<tr>
<td>AIR FRANCE</td>
<td>369</td>
<td>+3%</td>
<td>-66%</td>
</tr>
<tr>
<td>WIZZ AIR</td>
<td>313</td>
<td>+5%</td>
<td>-16%</td>
</tr>
<tr>
<td>DHL EXPRESS</td>
<td>250</td>
<td>+1%</td>
<td>+58%</td>
</tr>
<tr>
<td>PEGASUS HAVA TASL.</td>
<td>224</td>
<td>+5%</td>
<td>-36%</td>
</tr>
<tr>
<td>KLM ROYAL DUTCH AIR</td>
<td>224</td>
<td>+5%</td>
<td>-67%</td>
</tr>
<tr>
<td>DEUTSCHE LUFTHANSA</td>
<td>209</td>
<td>+0%</td>
<td>-86%</td>
</tr>
<tr>
<td>QATAR AIRWAYS COMP.</td>
<td>157</td>
<td>+7%</td>
<td>-36%</td>
</tr>
<tr>
<td>SCANDINAVIAN AIRLINES SYSTEM</td>
<td>152</td>
<td>-9%</td>
<td>+83%</td>
</tr>
<tr>
<td>EASYJET</td>
<td>136</td>
<td>+66%</td>
<td>-91%</td>
</tr>
</tbody>
</table>

- For States, Germany had the highest number of dep/arr flights yesterday (1,602 flights, +1% over 2 weeks) followed by France (1,601, -1%), Turkey (1,185, +4%), the UK (974, +7%), Spain (958, +5%), Italy (737, +7%), Norway (736, -8%) and the Netherlands (480, -1%).
- Compared to 2019, Turkey was at -46% (in terms of dep/arr flights), Norway (-53%), France (-60%), Germany (-71%), the Netherlands (-71%), Spain (-75%), Italy (-75%) and the UK (-82%).
- Market segments: all-cargo is the only segment consistently growing since beginning of January reaching +13% vs 2019, Charter is at -1%, Business Aviation is at -30%, Traditional at -72% and Low-Cost at -87%.

Traffic Flows & Country Pairs
- The intra-Europe flow is the main flow with 7,182 flights on 18 Feb (+2% over 2 weeks). Intra-Europe flights are at -67% compared to 2019 while all other flows are at -61%.
- Top traffic flows with Europe are with “Middle-East” (456 flights, -4%) followed by “North-Atlantic” (418 flights, -3%), “Asia/Pacific” (342 flights, -22%), “North-Africa” (274 flights, +9%).
- Yesterday, the highest domestic flows were within France (782 flights, -3% over 2 weeks), Norway (619, -6%), Turkey (551, +3%), Spain (461, -1%), Germany (435, -5%), UK (349, +16%) and Italy (301, +14%).
- The biggest increases over 2 weeks were recorded for Greece (-8%), Norway (-6%), Germany (-5%) and France (-3%). The highest increases were for UK (+16%), Italy (+14%) and Turkey (+3%).

Airports and Passengers
- İGA Istanbul Airport was the busiest airport on 18 Feb with 496 Dep/Arr flights (+3% over 2 weeks) followed by Paris CDG (460, +0%), Amsterdam (382, +2%), Madrid (378, +0%), Istanbul/Sabina (378, -1%), Frankfurt (365, -7%), Heathrow (290, -4%), Leipzig/Halle (223, +8%), Cologne/Bonn (192, -4%) and Oslo (187, -10%).
- For the 10 top airports, the highest increases over 2 weeks were for Leipzig/Halle (+8%) and İGA Istanbul Airport (+3%). The highest decreases were for Oslo (-10%), Frankfurt (-7%), London/Heathrow (-4%).
- ACI recorded 800k PAX on 29 Jan 2021, a loss of 4.2M PAX compared to the equivalent day in 2019 (i.e. -84%).

Economics
- En-route air navigation charges: The amount billed for January flights was 193€/pct (-65% vs January 2020).
- Continuous increase of Fuel price since October 2020 (reaching 152 cts/gal on 5 February).
1. Traffic Situation and Airlines Recovery

- The network recorded 9,641 flights on Thursday 18 February (-0% with -8 flights compared to Thursday 4 February). This is 34% of 2019 traffic levels. Based on a 7-day moving average, the decrease is -67% compared to 2019.

![EUROCONTROL Network
Daily Variation (Flights) compared with equivalent days in 2019](image1)

![Traffic variation compared with 2019
at Network Manager Area level](image2)
Overall situation against EUROCONTROL traffic scenarios:

- Over the first 18 days of February, traffic is -66% compared to the same days in 2019. This is slightly above the latest EUROCONTROL traffic scenarios published on 28 January 2021, mainly due to a very active cargo traffic as well as slightly higher operations for top airlines than anticipated (Note that a significant proportion of flight operations for some of the largest airlines are actually non-commercial, i.e. training flights to maintain pilot ratings).

![EUROCONTROL Traffic Scenarios](image)

European Airlines:

- **Turkish Airlines** was the airline with the highest number of flights (613 flights) on Thursday 18 February, increasing by +2% compared to Thursday 4 February (+10 flights), followed by **Air France** (369 flights, +3%, +10 flights), **Widerøe** (313, +0%, +0), **DHL Express** (280, +1%, +3), **Pegasus** (273, -35, -715), **KLM** (224, +11%, +23), **Lufthansa** (209, -0%, -1), **Qatar** (157, -11%, -20), **SAS** (152, -9%, -15), **easyJet** (136, +64%, +53), **British Airways** (110, +5%, +5), **Iberia** (108, -12%, -15) and **Ryanair** (108, +54%, +38).

Yesterday, **Wizz Air** was ranked 28th (60 flights, +9%).

- Compared to two weeks ago, the airlines which increased the most their capacity were **Ryanair** (+38, +54%), **KLM** (+23, +11%), **NetJets** (+21, +42%), **Canarias Airlines** (+17, +45%) and **Air Hambourg** (+14, +48%). Airlines which decreased the most were **TAP/Air Portugal** (-23 flights, -31%), **Qatar Airways** (-20, -11%), **Bristow Norway** (-16 flights, -14%), **Iberia** (-15 flights, -12%) and **Pegasus** (-15 flights, -5%).
### COVID 19 Impact on European Aviation

**EUROCONTROL Comprehensive Assessment**

![Aircraft operators](image)

<table>
<thead>
<tr>
<th>Aircraft Operators in EUROCONTROL Network</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily Variation (IFR Flights) - Thu 18 Feb 2021</td>
</tr>
</tbody>
</table>

- Compared to 2019, Widerøe operated at -18% on Thursday 18 February followed by Pegasus (-36%), Turkish Airlines (-51%), Air Nostrum (-57%), Air France (-66%), KLM (-67%), Iberia (-70%), Lufthansa (-86%), British Airways (-88%), easyJet (-91%) and Ryanair (-94%).

### News from key European airlines:

- **Air France-KLM** notes that SAF is unsustainable at current prices and that a French production chain is required. In 2020, Air France KLM transported only 34 million passengers (down 67% compared to 2019) and reported an operating loss of €4.5 billion and a huge net loss of €7.1 billion.

- **Alitalia** trials EU digital passenger locator forms.

- **easyJet** launches £3 billion programme of Euro Medium Term Notes.

- **Iberia, Airbus, Vueling, Aena** and **Enaire** partner in an €11 billion project to boost the aeronautical sector, including transforming Madrid Barajas into an intermodal hub.

- **Jet2 plc** raises £422 million through a share offering.

- **Lufthansa** reports that it is in negotiation with Airbus and Boeing on swapping certain orders for larger aircraft for smaller long range aircraft.

- **Pegasus** reports January passenger numbers down 59% (domestic -51%, international -69%).
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- **SWISS** notes that it is planning for 2021 scenarios ranging from 40% to 60%; extends minimal operations at Geneva (feeder services to Zurich and Frankfurt) until 27 March.
- **TUI Belgium** resumes 737 MAX commercial services.
- **Turkish Airlines** states that it was the sixth largest cargo carrier globally by 2020 traffic.

**States**

- The top 8 busiest states\(^1\) remained broadly stable with Germany taking back the first rank. **Germany** was the State with the highest number of dep/arr flights with 1,602 flights on Thursday 18 (+1% over 2 weeks) followed by **France** (1,601, -1%), **Turkey** (1,185, +4%), **the UK** (974, +7%), **Spain** (958, +5%), **Italy** (737, +7%), **Norway** (736, -8%) and **the Netherlands** (480, -1%).

![Diagram of States (Dep/Arr flights)
Traffic on Thu 18-02-2021 and evolution compared to Thu 04-02-2021](image)

- Compared to 2019, Departure/Arrival traffic on Thursday 18 February for the top 8 States was: Turkey (-46%), Norway (-53%), France (-60%), Germany (-71%), the Netherlands (-71%), Spain (-75%), Italy (-75%) and the UK (-82%).

![Diagram of States in EUROCONTROL Network
(compared with equivalent days in 2019)](image)

\(^1\) excluding overflights.
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News from States and industry:

- **France’s Transport Secretary** rejects EU proposals that Air France gives up slots at Orly before receiving further state aid.
- **German Government** reportedly drafting a €900m state aid package for German airports and DFS.
- **NATO** announces the opening of south-west air routes in the lower airspace over Kosovo.
- **UK Government** announces creation of Freeports – East Midlands and London Heathrow apply.

Market Segments:

- After the blip over Christmas break and on Monday 15 February:
  - **All-cargo** is the only segment consistently growing, posting a **+13%** increase at the (vs 2019).
  - **Charter** has increased to reach **-1%** (vs 2019).
  - **Business Aviation** has stabilised at **-30%** (vs 2019).
  - **Traditional** and **Low-Cost**, while accounting the majority of flights (respectively 49% and 26% of all flights in 2020), remain severely depressed. Recent days showed they are down to **-72%** and **-87%** respectively (vs 2019). The reinstated travel restrictions across Europe from late January forced the airlines to reduce their capacities to a minimum level of service.

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2 All segments show an artificial blip on 23 Dec 2020 as comparable day was Christmas day in 2019.
2. Traffic Flows & Country Pairs

- The main traffic flow is the intra-Europe flow with 7,182 flights on Thursday 18 February, which is increasing (+2%) over 2 weeks.
- The top traffic flows with Europe were with “Middle-East” (456 flights, -4%) followed by “North-Atlantic” (418 flights, -3%), “Asia/Pacific” (342 flights, -22%), “North-Africa” (274 flights, +9%) and “Other Europe” (258 flights, +1%).
- Intra-Europe flights are at -67% compared to 2019 while intercontinental flows are at -61%.

<table>
<thead>
<tr>
<th>REGION</th>
<th>04-02-2021</th>
<th>18-02-2021</th>
<th>%</th>
<th>vs. 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intra-Europe</td>
<td>7,067</td>
<td>7,182</td>
<td>+2%</td>
<td>-67%</td>
</tr>
<tr>
<td>Europe-&gt;Asia/Pacific</td>
<td>439</td>
<td>342</td>
<td>-22%</td>
<td>-57%</td>
</tr>
<tr>
<td>Europe-&gt;Mid-Atlantic</td>
<td>88</td>
<td>68</td>
<td>-23%</td>
<td>-61%</td>
</tr>
<tr>
<td>Europe-&gt;Middle-East</td>
<td>477</td>
<td>456</td>
<td>-4%</td>
<td>-67%</td>
</tr>
<tr>
<td>Europe-&gt;North Atlantic</td>
<td>431</td>
<td>418</td>
<td>-3%</td>
<td>-54%</td>
</tr>
<tr>
<td>Europe-&gt;North-Africa</td>
<td>251</td>
<td>274</td>
<td>+9%</td>
<td>-70%</td>
</tr>
<tr>
<td>Europe-&gt;Other Europe</td>
<td>256</td>
<td>258</td>
<td>+1%</td>
<td>-64%</td>
</tr>
<tr>
<td>Europe-&gt;South-Atlantic</td>
<td>63</td>
<td>65</td>
<td>+3%</td>
<td>-60%</td>
</tr>
<tr>
<td>Europe-&gt;Southern Africa</td>
<td>182</td>
<td>184</td>
<td>+1%</td>
<td>-41%</td>
</tr>
<tr>
<td>Non Intra-Europe</td>
<td>2,187</td>
<td>2,065</td>
<td>-6%</td>
<td>-61%</td>
</tr>
</tbody>
</table>
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- **Domestic flows are the most active** flows (i.e. 9 of the top 10 flows are domestic). The highest domestic flows were within **France** (782 flights, -3% over 2 weeks), **Norway** (619, -6%), **Turkey** (551, +3%), **Spain** (461, -1%), **Germany** (435, -5%), **UK** (349, +16%), **Italy** (301, +14%), **Sweden** (182, -1%) and **Greece** (167, -8%). The biggest decreases over 2 weeks were recorded for **Greece** (-8%), **Norway** (-6%), **Germany** (-5%) and **France** (-3%). The highest increases were for **UK** (+16%), **Italy** (+14%) and **Turkey** (+3%).

- The busiest non-domestic flows were **France-Germany** (107 flights), **Germany-UK** (104 flights) and **UK-US** (92 flights).

![Top 40 Country-Pairs (Dep/Arr flights). Traffic on Thu 18-02-2021 and evolution compared to Thu 04-02-2021](image)

- Compared to 2019, the largest domestic flows on Thursday 18 February were at -31% for France, -35% for Norway, -40% for Turkey, -61% for Spain, -63% for Germany, -69% for the UK, -60% for Italy, -61% for Sweden and -36% 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 16 February, stable on previous week.
  - On 16 February, U.S. airlines passenger volumes were 60% below 2019 levels with Domestic down 59% and International down 71%.
  - The domestic U.S. Load Factor averaged 59% in most recent week, versus 82% a year earlier.
  - The **nine largest passenger US airlines**\(^3\) incurred **$46 Billion in Pre-Tax Losses in 2020**. Their operating revenues fell by some -62.5%.

![Graph showing 7-Day Rolling Year-Over-Year Change in Aircraft Departures (%)](image)

- **China:**
  - Chinese domestic flights, after the rapid decline from mid-January, have recorded a recent blip to some 2,114 flights on 12 Feb (-82% compared to 1 Jan 2019) due to the Chinese New Year and the Chinese government decision to encourage people to stay where they work instead of going back to their hometowns for the holiday. Domestic traffic is now back to the situation before with 7,667 flights (-36% vs 1 Jan 2019)
  - International flights have been stable since March although slightly decreasing with 1,024 flights (-75% compared to 1 Jan 2019). The same is true for overflights with 509 flights (-68% compared to 1 Jan 2019).

\(^3\) A4A analysis of reports by Alaska, Allegiant, American, Delta, Hawaiian, JetBlue, Southwest, Spirit and United on a consolidated company basis for system wide operations.
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- **Middle East:**
  - Intra-Middle-East traffic stabilised with 1,563 flights on 17 February (-44% compared to Feb 2019). International traffic is at 1,316 flights (-57% compared to Feb 2019). Overflights are recording 327 flights (-20% compared to Feb 2019).

**News for worldwide airlines:**
- **Air Canada** reports net loss of $3.5 billion in 2020.
- **ANA** completes a 10 day trial off an autonomous shuttle bus at Tokyo Haneda Airport.
- **Cathay Pacific** reports passenger numbers down 99% in January.
- **Emirates** suspends services from Dubai to Nigeria.
- **Etihad Airlines** reports it has achieved vaccination of all onboard staff.
- **Singapore Airlines** to resume service to Tokyo Haneda from 2 March; reports passengers down 97% in January.
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- **South African Airways** engaging with potential equity partners for the airline and the government intends to select a partner in the next month or so.
- **United Airlines** has resumed revenue services with the 737 MAX.

4. **Airport Information**

- **İGA Istanbul Airport** was the busiest airport on Thursday 18 February with 496 Dep/Arr flights (+3% over 2 weeks) followed by **Paris CDG** (460, +0%), **Amsterdam** (382, +2%), **Madrid** (378, +0%), **İstanbul/Sabiha** (378, -1%), **Frankfurt** (365, -7%), **London/Heathrow** (290, -4%), **Leipzig/Halle** (223, +8%), **Cologne/Bonn** (192, -4%) and **Oslo** (187, -10%).

- The highest increases over 2 weeks in the top 10 airports were for **Leipzig/Halle** (+8%), **İGA Istanbul Airport** (+3%) and **Amsterdam** (+2%). The highest decreases were for **Oslo** (-10%), **Frankfurt** (-7%), **London/Heathrow** (-4%).

- Compared to 2019, **Paris CDG** operated at -65% on Thursday 18 February, **Madrid** (-67%), **Amsterdam** (-72%), **Frankfurt** (-73%), **Oslo** (-75%) 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:

- **Aena** reports January passenger numbers down 82% for Madrid Barajas and 88% for Barcelona.
- **Beijing Capital International Airport** reports passenger numbers down 78% in January (domestic -70%, international -99%).
- **Brussels Airport** reports passenger numbers down 84% in January but cargo volumes up 21%.
- **Copenhagen Airport** reports passenger numbers down 91% in January (domestic -75%, Europe -92%, intercontinental -91%).
- **Groupe ADP** reports passenger numbers down 74% in January (domestic -63%, Europe -84%, other international -68%); reports net loss of €1.5 billion in 2020.
- **Hong Kong International Airport** reports passenger numbers down 99% in January.
- **London Heathrow Airport** reports passenger numbers down 89% in January.
- **Manchester Airports Group** reports January passenger numbers down 93% for Manchester, 95% for Stansted and 98% for East Midlands.
- **Paris CDG Airport** requested by government to terminate its terminal 4 construction project.
- **Swedavia** reports revenue down 60% in 2020 and an operating loss of €152 million.
- **Zurich Airport** reports passenger numbers down 87% in January (Europe -85%, intercontinental -90%).

**Passengers:**

- **ACI** recorded just below 800,000 passengers on 29 January 2021, a loss of 4.2M passengers compared to the equivalent day in 2019 (i.e. -84%).

![Europe: Airport Passenger Traffic 2020 vs 2019](image)

**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 10% of people have received even one dose.
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**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).

- **En-route air navigation charges:** The amount billed for en-route charges was 193M€ for January flights. This is -65% vs January 2020.

<table>
<thead>
<tr>
<th>Route Charges (M€)</th>
<th>Jan flights</th>
<th>Feb flights</th>
<th>Mar flights</th>
<th>Apr flights</th>
<th>May flights</th>
<th>Jun flights</th>
<th>Jul flights</th>
<th>Aug flights</th>
<th>Sep flights</th>
<th>Oct flights</th>
<th>Nov flights</th>
<th>Dec flights</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total net chargeable amounts (VAT excl.)</td>
<td>193</td>
<td>-65%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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</table>

- **Fuel Price:** Jet fuel prices have recorded a recent increase early February 2021, reaching 157 cts/gal on 12 February.

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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](http://www.eurocontrol.int/Economics/DailyTrafficVariation) (or via the COVID-19 button on the top of our homepage [www.eurocontrol.int](http://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](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](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.