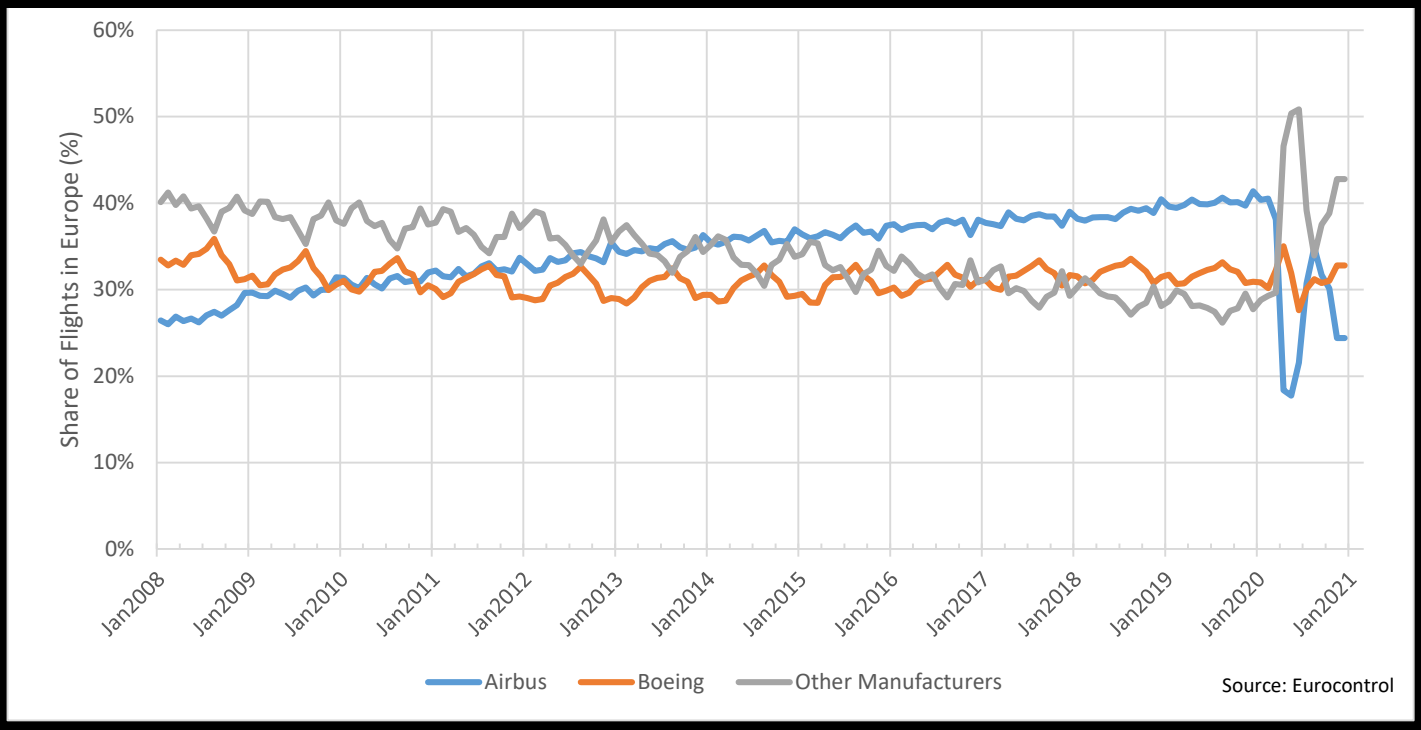
EUROCONTROL Data Snapshot

COVID-19 cuts to flights have interrupted Airbus's growing dominance of flights in Europe

9 February 2021



If we split flights in Europe into those by an Airbus, by a Boeing or by any other make of aircraft, then Airbus has steadily increased its share of flights over the last ten years and more. Airbus overtook Boeing in market share around 2011, and then all the others combined around 2014.

For the last year, we have been reporting frequently on how airlines' cuts in response to the COVID-19 pandemic shook up the shares of different market segments (low-cost, business aviation etc) with all-cargo flights becoming a much larger share of the whole. The chart shows that something similar happens here, with shares of the manufacturers being shuffled, and Airbus's market share dropping by rather more than Boeing's. Reasons for this include:

- Long-haul flights, dominated by Boeing & Airbus, were radically cut, cutting their market share compared to other manufacturers. Here Boeing's market share held up better, with many more Boeing 777 and 747 flights than Airbus 330 and 380.
- Short-haul, mostly domestic flights held up better. These are mostly by smaller aircraft neither from Airbus nor Boeing. The most striking example is that, from April-June, the busiest non-Airbus/Boeing aircraft was the S92 Sikorsky helicopter, where it normally ranks in the teens. Even in lockdown, oil rigs still need their connectivity to dry land.

At the start of 2021, the ordering isn't yet returned to pre-COVID 'normal'. Indeed as the traffic outlook weakens again, 'normal' manufacturer shares might be some time off.

Technical Bits: We've left Boeing & Airbus helicopters in 'other manufacturers'. Aircraft designations change with time: we have used today's, so that the Airbus A220 is labelled as 'Airbus' throughout, rather than 'Bombardier' then 'Airbus'. ATR, while a joint venture for Airbus, is classed in 'other.' It had a share of 3.5-4% in both Summer 2008 and Summer 2019. 'Europe' here is the airspace of member states of the European Civil Aviation Conference. The data include a small proportion of overflights of Europe.