

11 March 2021



COVID 19 IMPACT ON EUROPEAN AVIATION

EUROCONTROL
Comprehensive Assessment



SUPPORTING EUROPEAN AVIATION



NETWORK
MANAGER



Headlines

- 9,856 flights (36% of 2019 levels) on Wednesday 10 March 2021.
- March traffic slightly increasing within Network over 2 weeks (+3%, +297 flights).
- Positive trend since mid-February, stabilizing over the last week.
- Most top 10 States slightly increasing (2-digits for Switzerland and Italy), except Norway.
- All cargo (+10% vs 2019). DHL Express is 4th. No Low cost carriers in the top 10.
- Domestic traffic: Europe (-66%), US (-39%), China (-1%), Middle East (-44%).

Traffic Situation

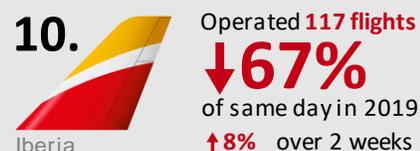
Daily flights (including overflights)

Traffic over the last 7 days is

↓ 65%

Compared to equivalent days in 2019

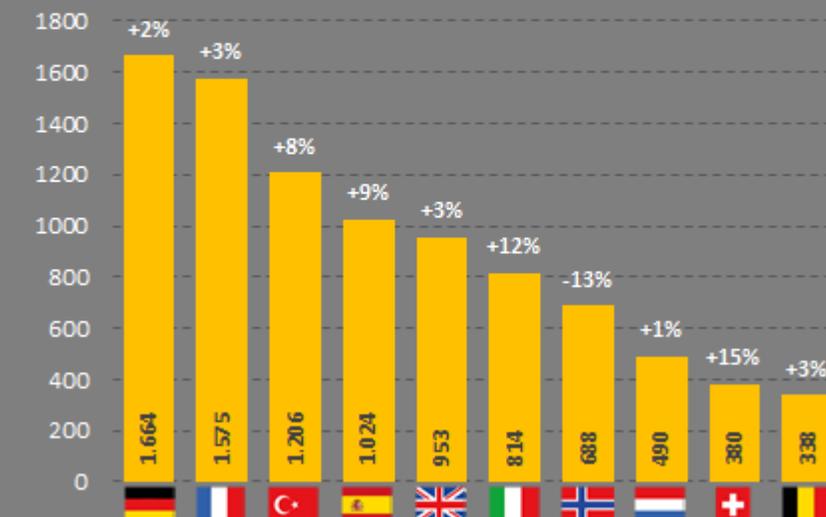
Top 10 Aircraft Operators on Wed 10 March 2021 (daily flights)



Top 10 Busiest States on Wed 10 March 2021

on Wed 10 March 2021

(Dep/Arr flights and variation over 2 weeks)



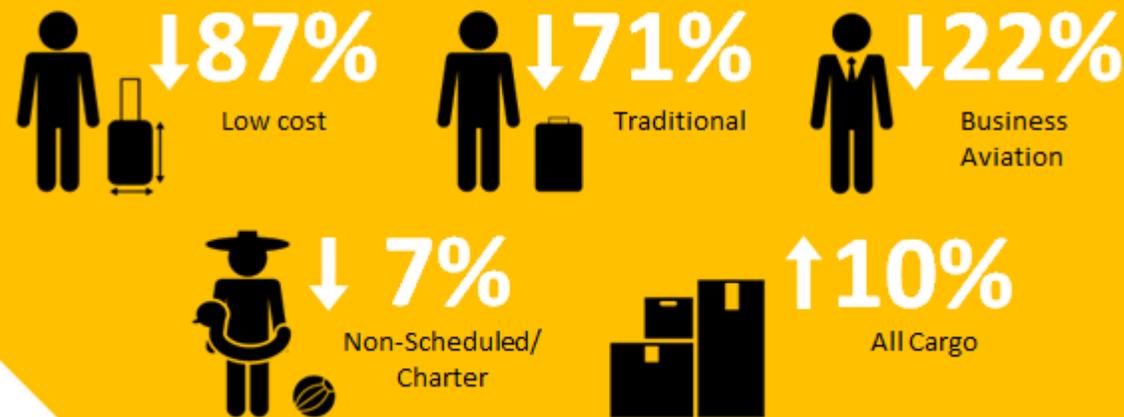
Top 10 Busiest Airports

7-day average daily Dep/Arr flights on 10 March, compared to 2019

Top 10 Airports	Average flights per day (week 4-10/3)	Average flights per day (week 4-10/3) vs 2019
IGA Istanbul Airport	538	Not yet in operation in early 2019
Paris/Charles-De-Gaulle	441	-66%
Frankfurt	428	-68%
Amsterdam	408	-68%
Istanbul/Sabiha Gokcen	372	-37%
Madrid/Barajas	349	-68%
London/Heathrow	314	-76%
Oslo/Gardermoen	197	-72%
Milan/Malpensa	187	-64%
Leipzig/Halle	186	-6%

Market Segments

On 10 Mar, compared to 2019



Traffic Flow

On 10 March, the intra-European traffic flow was

7,191
flights

+1%
over past 2 weeks

-66%
compared to 2019

Economics

(05 March 2021)

Fuel price

↑ 170
Cents/gallon

compared to 165 cents/gallon
on 26 Feb 21

Source: IATA/Platts

Passengers

(25 February 2021)

0.89 million pax

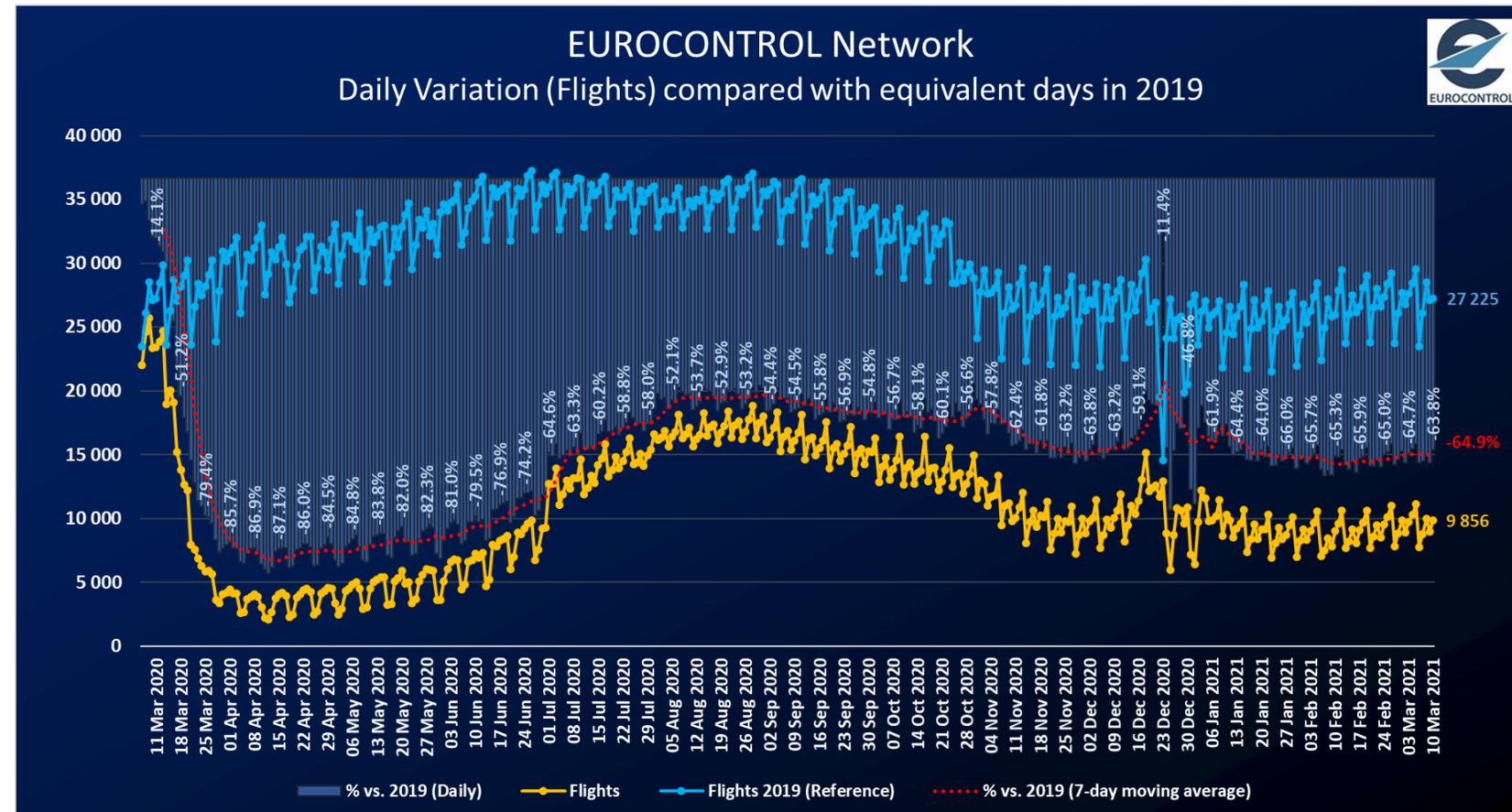
-4.8 million
Vs. 2019
(-85%)

Source: ACI

Overall traffic situation at network level



- ✘ **9,856 flights** on Wednesday 10 March .
- ✘ **+3%** with **+297 flights** over 2 weeks (Wednesday 24 February).
- ✘ **36%** of 2019 traffic levels.



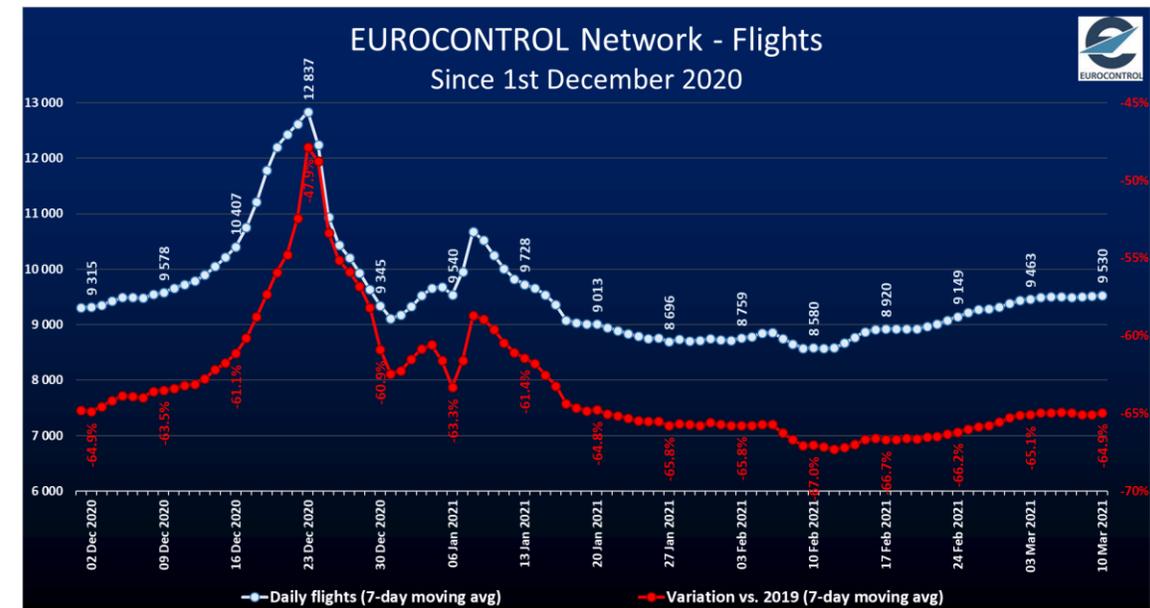
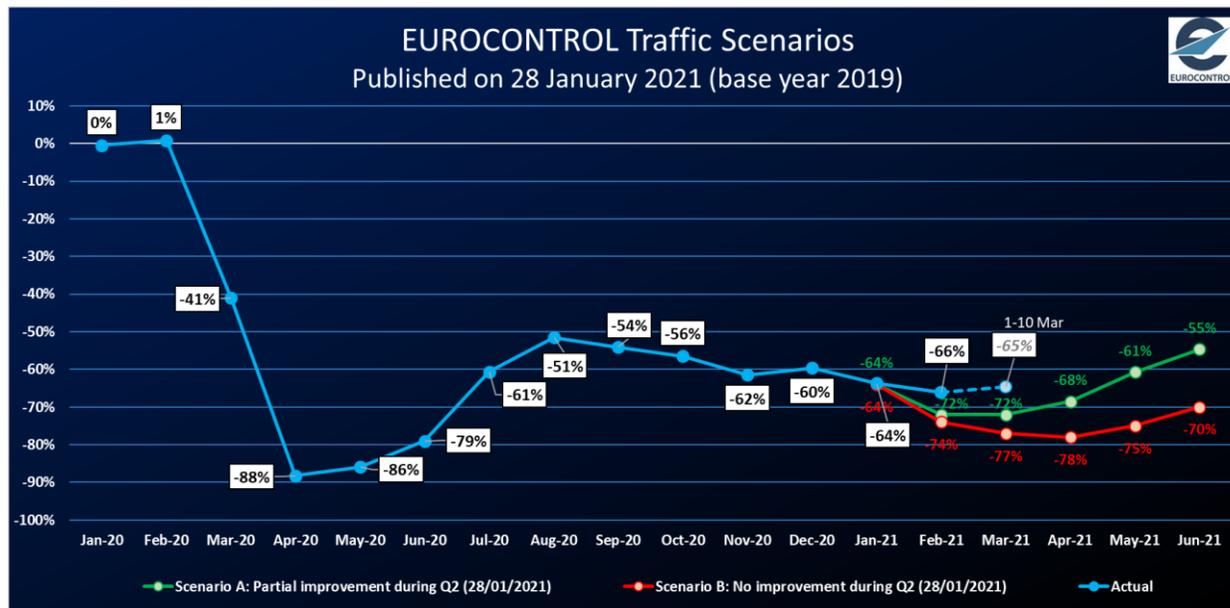
Current situation and scenarios

✘ **Traffic at -65% on the first 10 days of March**, above the latest EUROCONTROL traffic scenarios published on 28 January 2021 mainly due to:

- Very active cargo traffic.
- Higher number of 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 and circular flights to maintain pilot ratings.

✘ After having reached a minimum at network level in the 2nd week of February, the traffic has shown a **positive steady trend since mid February but has stabilized over the last week.**



Aircraft operators (Daily flights)

Top 10

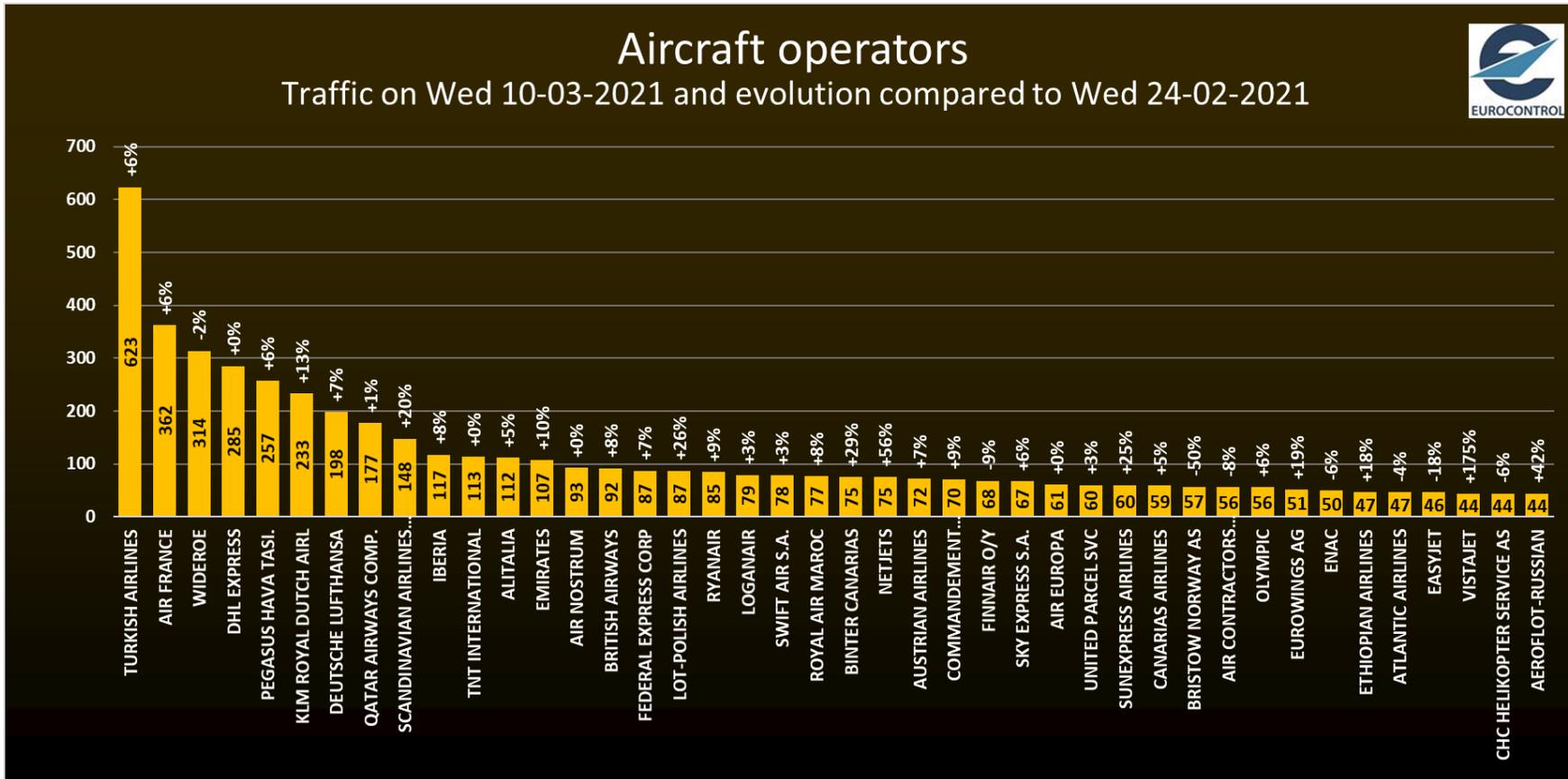


Rank evolution over 2 weeks	Top 10 Aircraft Operators on Wed 10-03-2021				
	Aircraft Operator	Dep/Arr Flights	Δ over 2 weeks	% over 2 weeks	% vs 2019
→	TURKISH AIRLINES	623	↗ +36	+6%	↘ -50%
→	AIR FRANCE	362	↗ +21	+6%	↘ -68%
→	WIDEROE	314	↘ -7	-2%	↘ -16%
→	DHL EXPRESS	285	→ +0	+0%	↗ +6%
→	PEGASUS HAVA TASI.	257	↗ +15	+6%	↘ -37%
→	KLM ROYAL DUTCH AIRL	233	↗ +26	+13%	↘ -60%
→	DEUTSCHE LUFTHANSA	198	↗ +13	+7%	↘ -87%
→	QATAR AIRWAYS COMP.	177	↗ +2	+1%	↘ -26%
→	SCANDINAVIAN AIRLINES SYSTEM	148	↗ +25	+20%	↘ -85%
↗	IBERIA	117	↗ +9	+8%	↘ -67%

- ✘ Stability of the ranking.
- ✘ High increase for SAS over 2 weeks (+20%) mainly driven by more domestic traffic in Norway.
- ✘ High increase for KLM over 2 weeks (+13%) mainly driven by circular flights in Groningen/Eelde.
- ✘ Turkish Airlines added the highest number of flights over 2 weeks (+36).
- ✘ Iberia took 10th rank yesterday.

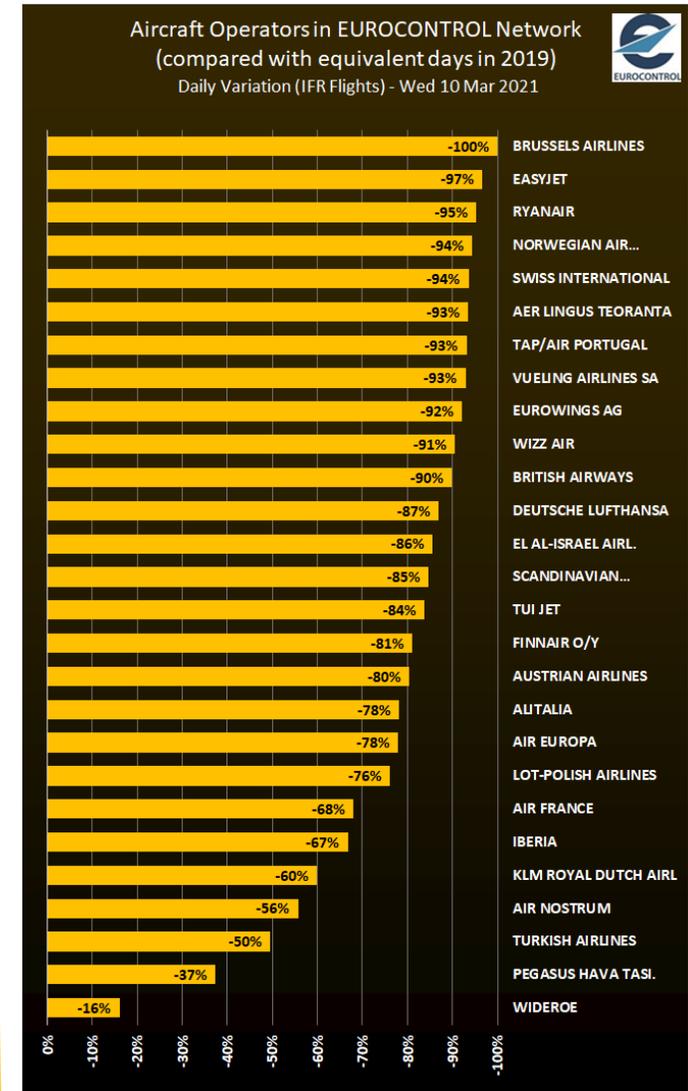
Aircraft operators (Daily flights)

Top 40 - Latest operations



✂ 4 freight carriers within the top 30. DHL Express 4th.

✂ British Airways 15th, Ryanair 18th, easyJet 39th and Wizz Air 44th.



Aircraft operators

Latest news



European airlines

- ✘ **Austrian Airlines** reports that it has sold three 767-300ERs. It is also shedding 18 Dash turboprops and 7 A319s by the end of this year to leave a fleet of around 60 aircraft.
- ✘ **Lufthansa Cargo** reports 2020 revenue of €2.76Bn (+11%) with an adjusted EBIT of €772M (2019: €1M).
- ✘ **Ryanair** announces plans return to Belfast City Airport after 11 years with 8 new routes this summer.
- ✘ **Wizz Air** plans to establish a base at Palermo in June with 7 routes.
- ✘ **Lufthansa Group** reports passenger number in 2020 were down 75.2%, with a load factor of 63.2, 19.4 points lower than in 2019; reports a net loss of €6.7Bn in 2020; expects to offer 40-50% of pre-coronavirus capacity in 2021 and that this will reach 90% by the middle of the decade; notes it cut its workforce by 28,000 in 2020 and that another 10,000 cuts may be required in 2021.
- ✘ **SWISS** states it is still losing ~CHF 2M per day and will need to further intensify cost saving endeavours; it expects to have reduced its workforce by ~1,000 full time positions by end 2021.

- ✘ **Virgin Atlantic** reports 90% load factor for UK to Lagos service.
- ✘ **Eurowings** to open a new hub at Berlin Brandenburg.
- ✘ **Pegasus Airlines** reports €211M net loss in 2020; cash burn in Q4 was €29M per month; cash reserve at year end was €143M; raised €28M from a bond issuance in February; plans 92 aircraft at end 2021, one down on end 2020.
- ✘ **El Al** commences trial of rapid antigen test at check-in for flights to New York.

Worldwide airlines

- ✘ **Air Canada** to remove seats from three 777s and two A330s to use them for cargo services.
- ✘ **American Airlines** and **United Airlines** to provide Chicago O'Hare airport workers with vaccines.
- ✘ **Emirates** increasing its service to Cairo to two daily A380s and resuming services to Dallas and San Francisco.
- ✘ **Etihad Airways** reports \$1.7Bn operating loss in 2020.
- ✘ **United Airlines** to delay resumption of 17 long haul international services, mostly until at least October.

States (Daily Departure/Arrival flights)

Top 10



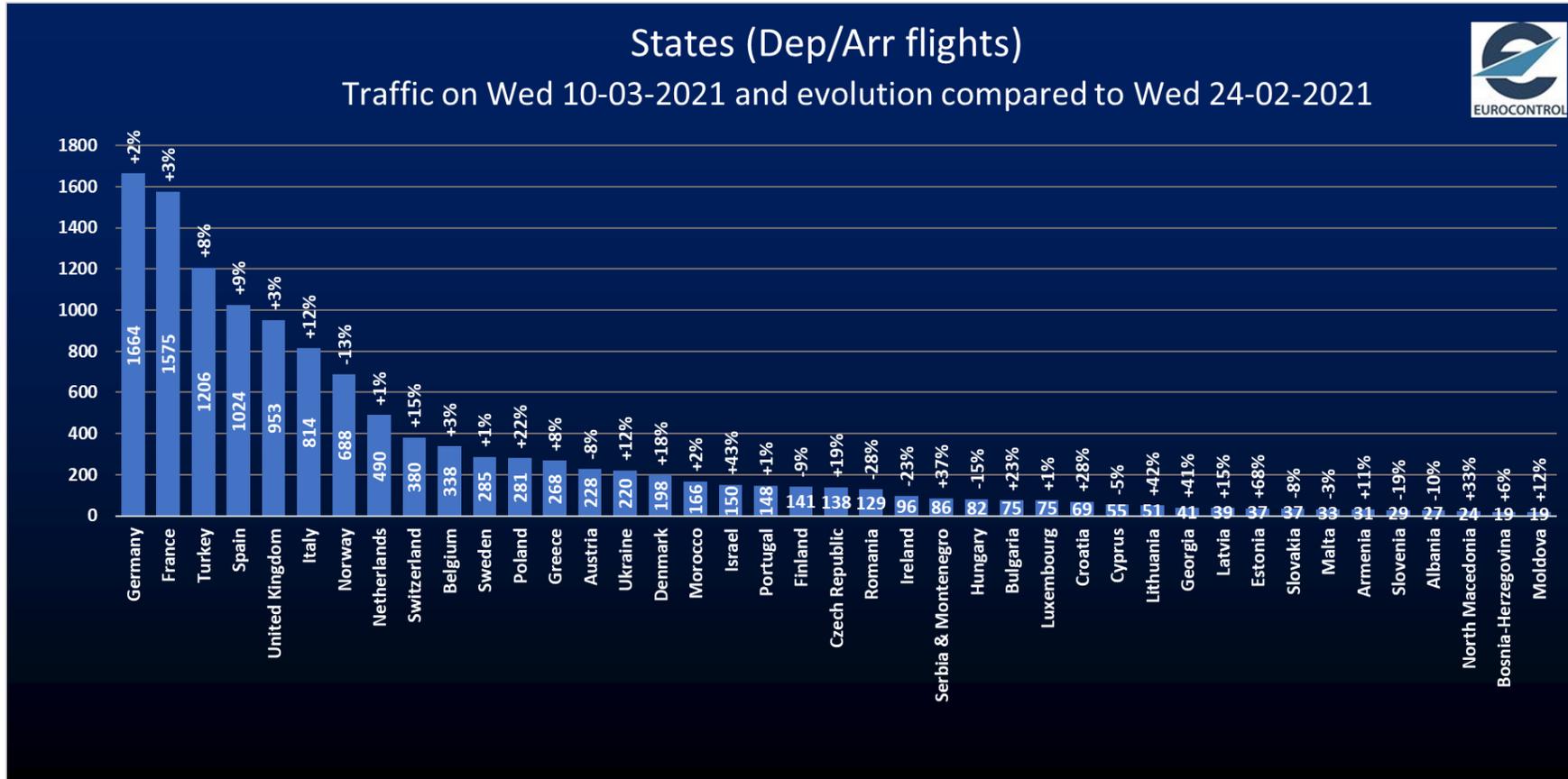
Rank evolution over 2 weeks	Top 10 States on Wed 10-03-2021				
	State	Dep/Arr Flights	Δ over 2 weeks	% over 2 weeks	% vs 2019
→	Germany	1664	↗ +32	+2%	↘ -69%
→	France	1575	↗ +44	+3%	↘ -60%
→	Turkey	1206	↗ +89	+8%	↘ -45%
→	Spain	1024	↗ +83	+9%	↘ -72%
→	United Kingdom	953	↗ +24	+3%	↘ -81%
↗	Italy	814	↗ +86	+12%	↘ -72%
↘	Norway	688	↘ -101	-13%	↘ -56%
→	Netherlands	490	↗ +4	+1%	↘ -67%
→	Switzerland	380	↗ +50	+15%	↘ -71%
→	Belgium	338	↗ +11	+3%	↘ -64%

- ✘ Italy takes the 6th rank.
- ✘ 2-digit increase for Switzerland (+15%) and Italy (+12%) over 2 weeks.
- ✘ Turkey, Italy and Spain add the highest number of flights.
- ✘ Decrease for Norway (-13%) mainly due to less flights from Bristow Norway AS.

States (Daily Departure/Arrival flights)



Latest traffic situation



✘ On 10 March 2021, traffic levels per States record declines ranging from -85% (Ireland) to -42% (Armenia), compared to same day in 2019.





✘ **Airbus** states that it will not undertake mandatory redundancies at its operations in Germany, France and the UK (Spain remains uncertain); reports that in February it received 11 orders and 92 order cancellations.

✘ The **European Court of Auditors** launches an audit to assess whether the European Commission has been effectively safeguarding the rights of air passengers during the pandemic.

✘ **European Commission** to put forward a legislative proposal for a digital green pass to help ease travel.

✘ **EASA** issues guideline for the management of drone incidents at airports.

✘ **IATA** reports that global cargo tonne km flown in January were up 1.1% year-on-year.

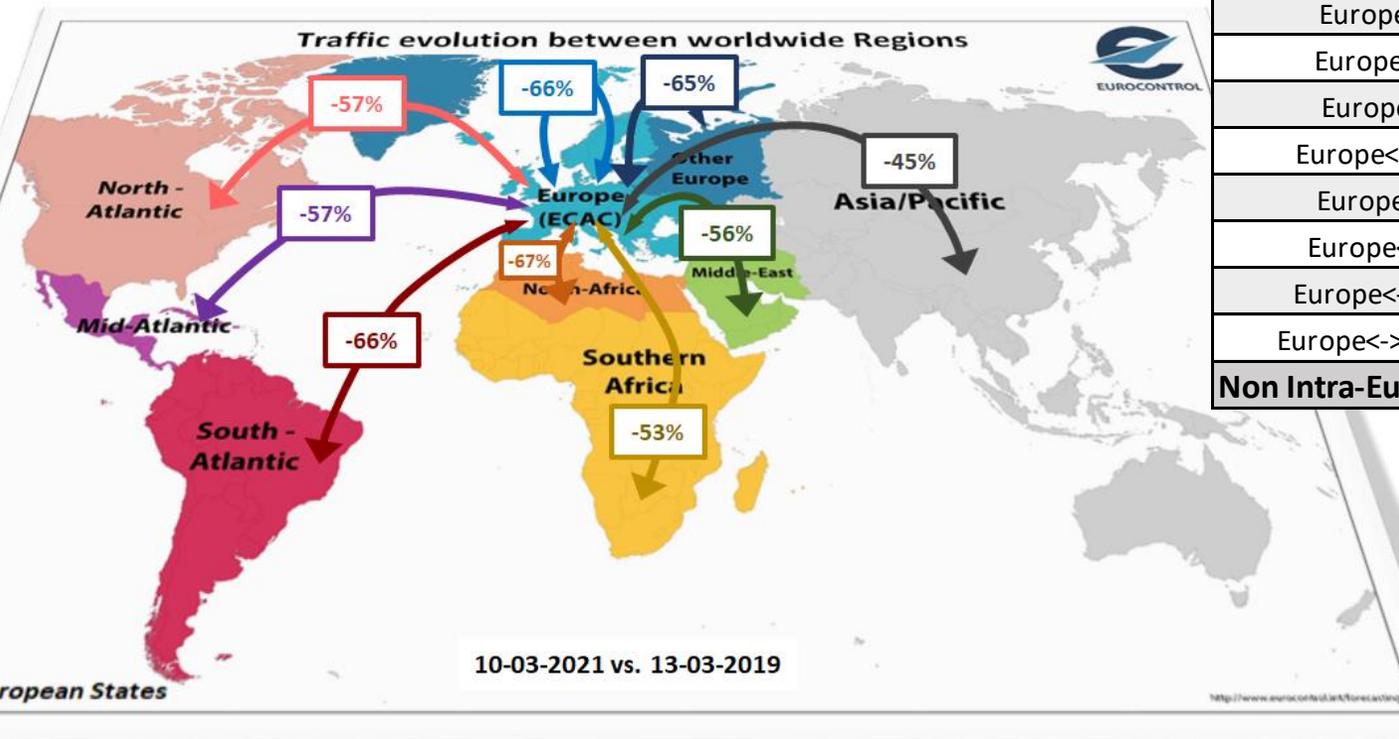
✘ **SITA** confirms that at least eight carriers have been affected by a cyber-attack on the SITA Passenger Service System, including Finnair and Lufthansa.

Traffic flows (Daily Departure/Arrival flights)



- ✘ The main traffic flow is the intra-Europe flow with 7,191 flights on Wednesday 10 March, which is increasing (+1%) over 2 weeks.
- ✘ Intra-Europe flights are at -66% compared to 2019 while intercontinental flows are at -58%.

REGION	24-02-2021	10-03-2021	%	vs. 2019
Intra-Europe	7.113	7.191	+1%	-66%
Europe<->Asia/Pacific	371	409	+10%	-45%
Europe<->Mid-Atlantic	66	69	+5%	-57%
Europe<->Middle-East	493	555	+13%	-56%
Europe<->North Atlantic	406	403	-1%	-57%
Europe<->North-Africa	233	272	+17%	-67%
Europe<->Other Europe	236	283	+20%	-65%
Europe<->South-Atlantic	49	55	+12%	-66%
Europe<->Southern Africa	163	153	-6%	-53%
Non Intra-Europe	2.017	2.199	+9%	-58%



Country pairs (Daily Departure/Arrival flights)

Top 10



Rank evolution over 2 weeks	Top 10 Country-Pair on Wed 10-03-2021				
	Country-Pair	Dep/Arr Flights	Δ over 2 week	% over 2 week	% vs 2019
→	France <-> France	807	↓ -13	-2%	↓ -33%
→	Norway <-> Norway	578	↓ -64	-10%	↓ -39%
→	Turkey <-> Turkey	563	↑ +10	+2%	↓ -39%
↑	Spain <-> Spain	499	↑ +35	+8%	↓ -57%
↓	Germany <-> Germany	417	↓ -64	-13%	↓ -57%
↑	Italy <-> Italy	335	↑ +35	+12%	↓ -56%
↓	United Kingdom <-> United Kingdo	310	↓ -5	-2%	↓ -70%
↑	Sweden <-> Sweden	149	↓ -2	-1%	↓ -69%
↓	Greece <-> Greece	146	↓ -9	-6%	↓ -37%
→	France <-> Germany	102	↑ +9	+10%	↓ -72%

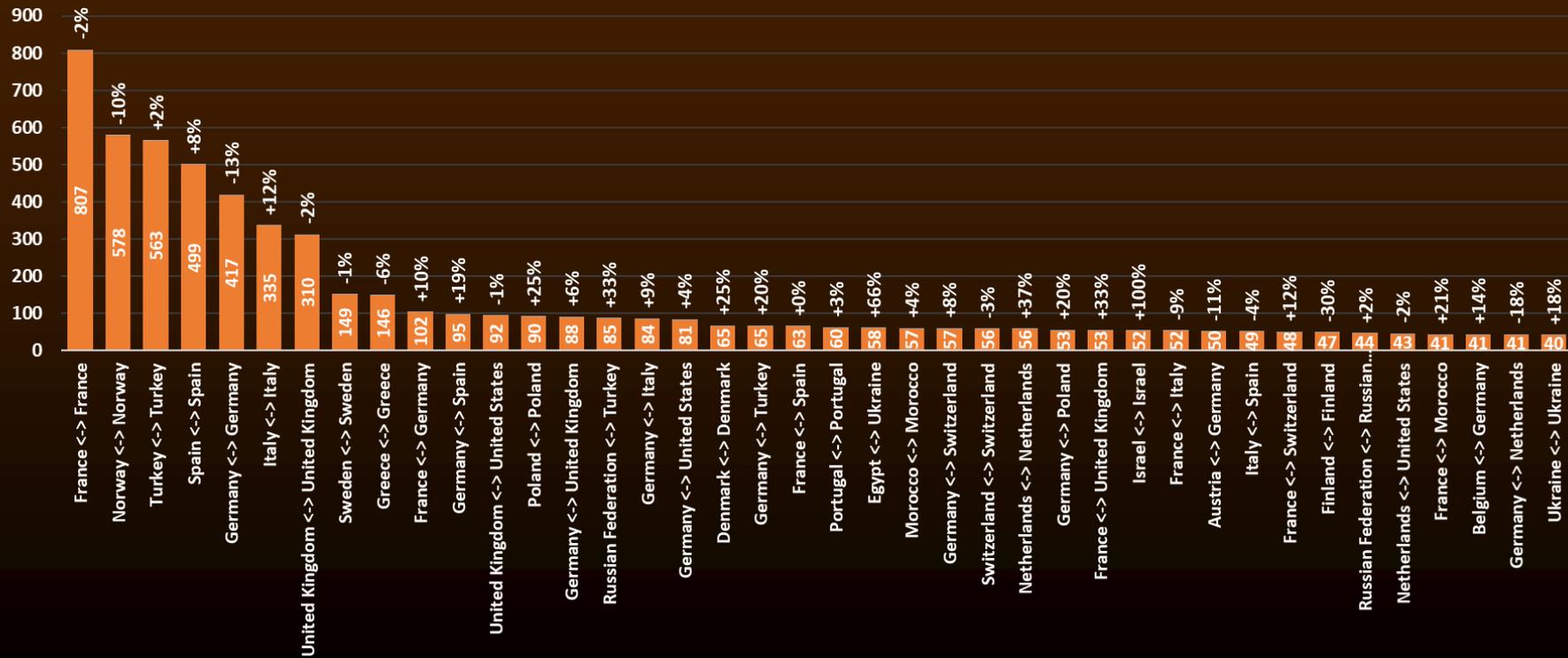
- ✘ 9 of the top 10 flows are domestic.
- ✘ Half of top domestic flows showed an increase over 2 weeks, in particular Italy (+12%) and Spain (+8%). The other half was negative, in particular Germany (-13%), Norway (-10%).
- ✘ The France-Germany domestic flow increased by +10%.

Country pairs (Daily Departure/Arrival flights)

Latest traffic situation



Top 40 Country-Pairs (Dep/Arr flights).
Traffic on Wed 10-03-2021 and evolution compared to Wed 24-02-2021



✖ The busiest non-domestic flows were **France-Germany** (102 flights, +10% over 2 weeks), **Germany-Spain** (95, +19%) and **UK-US** (92, -1%).

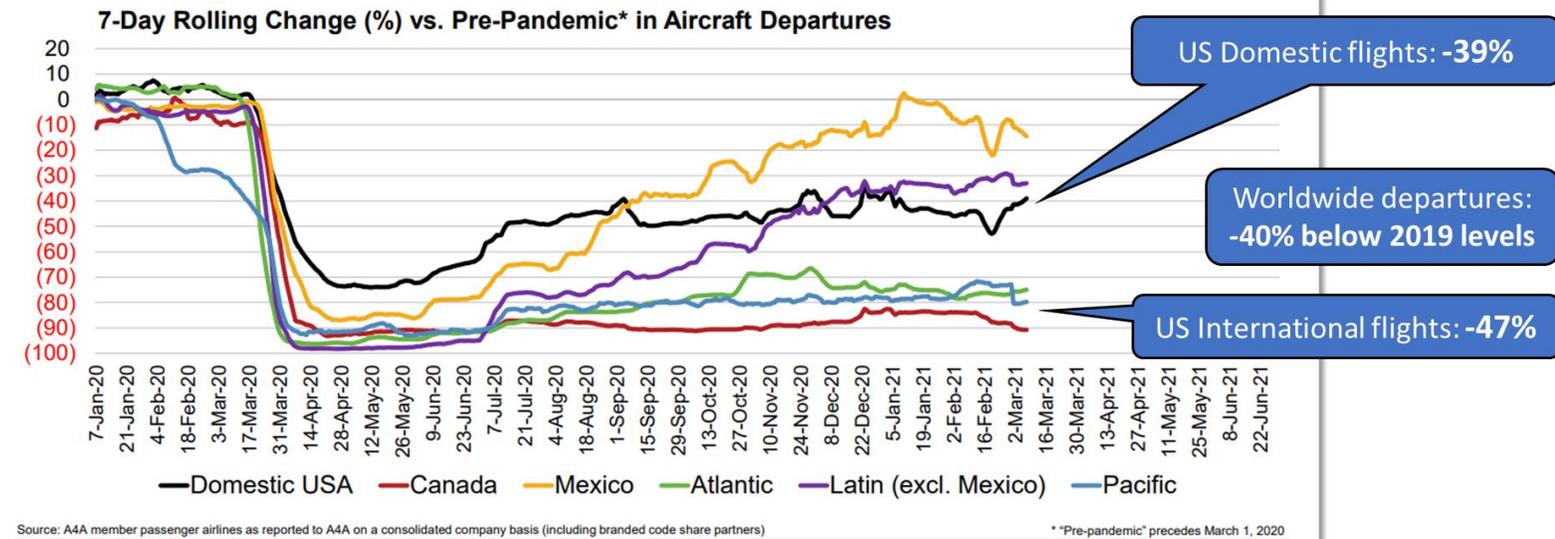
Outside Europe



USA

- ✘ Peak in COVID-19 cases was reached early January in the US but declined steadily since. Number of new cases in Brazil is now exceeding the USA values.
- ✘ US domestic recorded a decline of 39% (vs 2019) and international traffic recorded a decline of 47% (vs 2019) on 9 March. This is an improvement for domestic traffic but a deterioration for international (when compared to last week).
- ✘ On 9 March, US airline passenger volumes were 57% below 2019 levels with domestic down 55% and international down 71%.
- ✘ The domestic US load factor remained stable at 60% in recent weeks vs 83% a year earlier.

In Most Recent Week, U.S. Passenger Airline Departures Were 40% Below Pre-Pandemic Levels
 Domestic Flights Operated Down 39%, International Flights Operated Down 47%

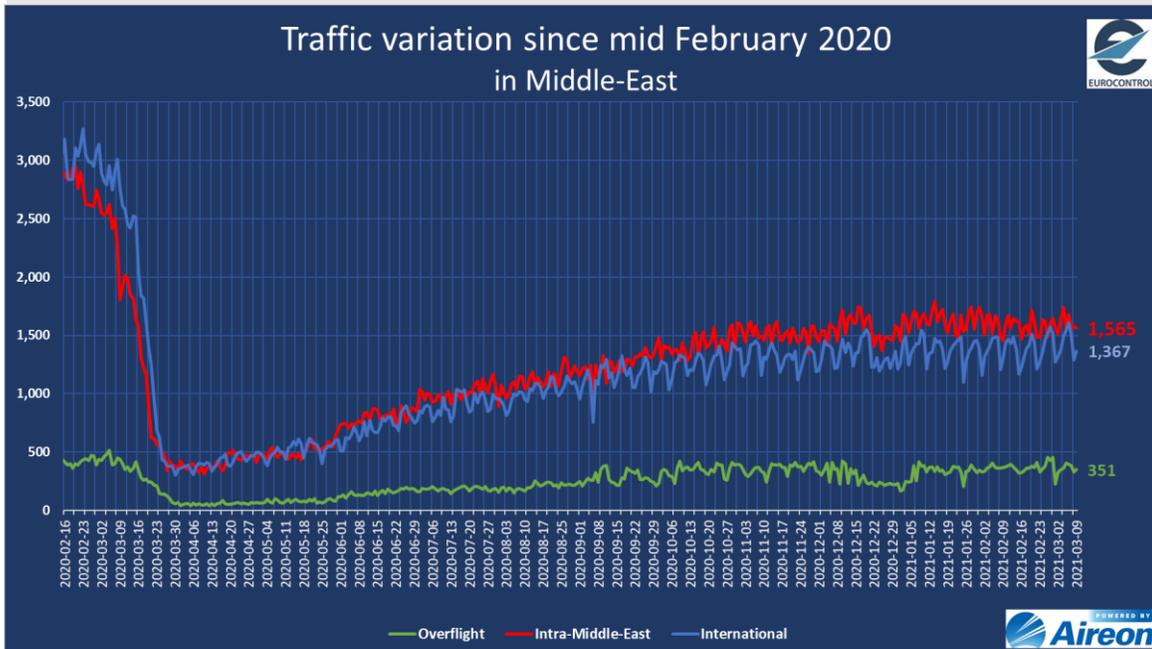


Outside Europe



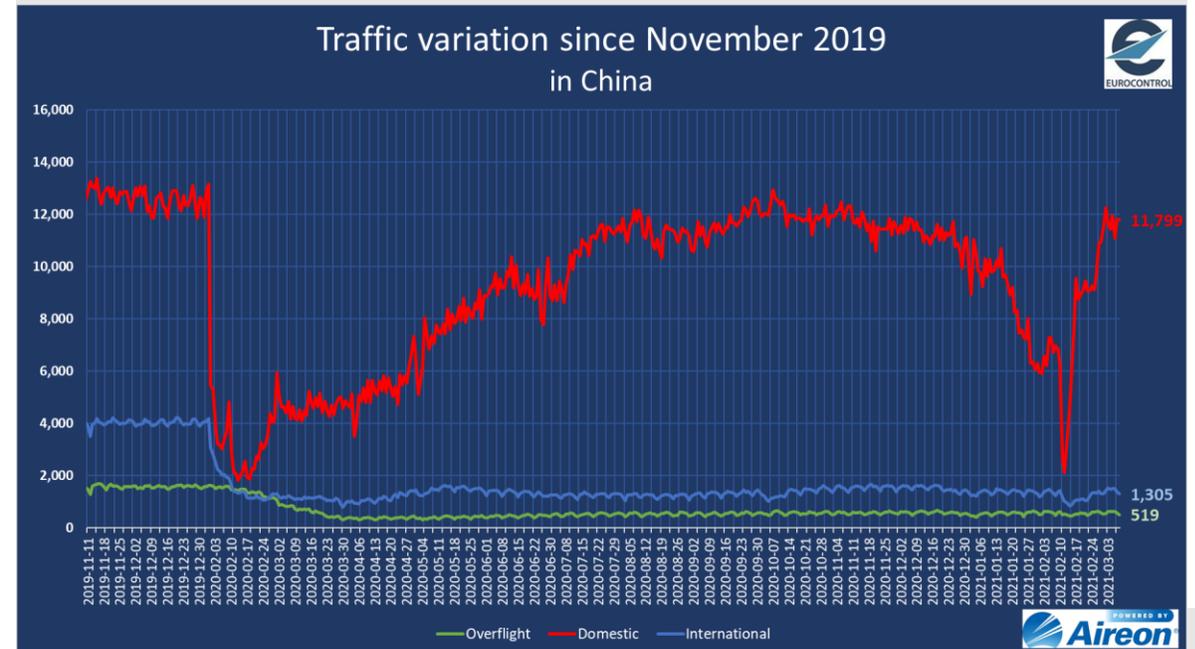
Middle East

- ✘ Intra-Middle-East traffic stabilised around 1,565 daily flights on 9 March (-44% compared to Feb 2020).
- ✘ International traffic shows a small increase on previous week at 1,367 flights (-55% compared to Feb 2020).
- ✘ Overflights are stable around 351 flights (-18% compared to Feb 2019).
- ✘ Riyadh airport is the busiest airport in the region with more than 330 flights per day (-31% compared to Feb 2020 levels).



China

- ✘ Chinese domestic flights recorded a huge drop on Chinese New Year (12 Feb) but have rebounded since with 11,799 flights on 8 March. Recent domestic levels are catching up with the pre-COVID levels (only 1% below the early January 2020 levels).
- ✘ International flights and overflights were stable on previous weeks with 1,305 and 519 flights respectively (-68% and -67% vs 1 Jan 2020).
- ✘ China reported a 72.9% load factor in 2020, corresponding to a 10.2 pp decrease on 2019 (source: CAAC).



Airports (Daily Departure/Arrival flights)

Top 10 and latest news



Rank evolution over 2 weeks	Top 10 Airports on Wed 10-03-2021				
	Airport	Dep/Arr Flights	Δ over 2 weeks	% over 2 weeks	% vs 2019
→	IGA Istanbul Airport	533	↗ +37	+7%	Not appl
→	Paris/Charles-De-Gaulle	437	↗ +13	+3%	↘ -66%
↗	Frankfurt	397	↗ +36	+10%	↘ -72%
↘	Amsterdam	391	↗ +4	+1%	↘ -68%
↗	Madrid/Barajas	356	↗ +30	+9%	↘ -67%
↘	Istanbul/Sabiha Gokcen	350	↗ +23	+7%	↘ -38%
→	London/Heathrow	293	↗ +33	+13%	↘ -77%
→	Leipzig/Halle	223	↘ -4	-2%	↘ -9%
↗	Cologne/Bonn	208	↗ +17	+9%	↘ -46%
↘	Oslo/Gardermoen	197	↗ +2	+1%	↘ -73%

- ✘ Most top 10 airports showed an increase over 2 weeks.
- ✘ 2-digit increase for London/Heathrow (+13%) thanks to additional flights to China and from Virgin Atlantic.
- ✘ 2-digit increase for Frankfurt (+10%) mainly driven by more flights from Lufthansa.

Airports

Latest news

- ✘ **Ankara Airport** February passenger numbers down 62.3% year-on-year (-57.7% domestic, -84.5% international).
- ✘ **Helsinki Airport** February passenger numbers down 92.4% year-on-year (-83.2% domestic, -94.5% international).
- ✘ **Manchester Airport** February passenger numbers down 95.5% year-on-year (domestic-89.7%, international -96.0%, charter -97.9%).
- ✘ **Riga Airport** – European Commission approves Latvian government's plans for up to €40M capitalisation.
- ✘ **Swedavia** reports that it handled 271,000 passengers in February at its 10 airports (including Stockholm Arlanda), a drop of 90% year-on-year (-92% international, -85% domestic).

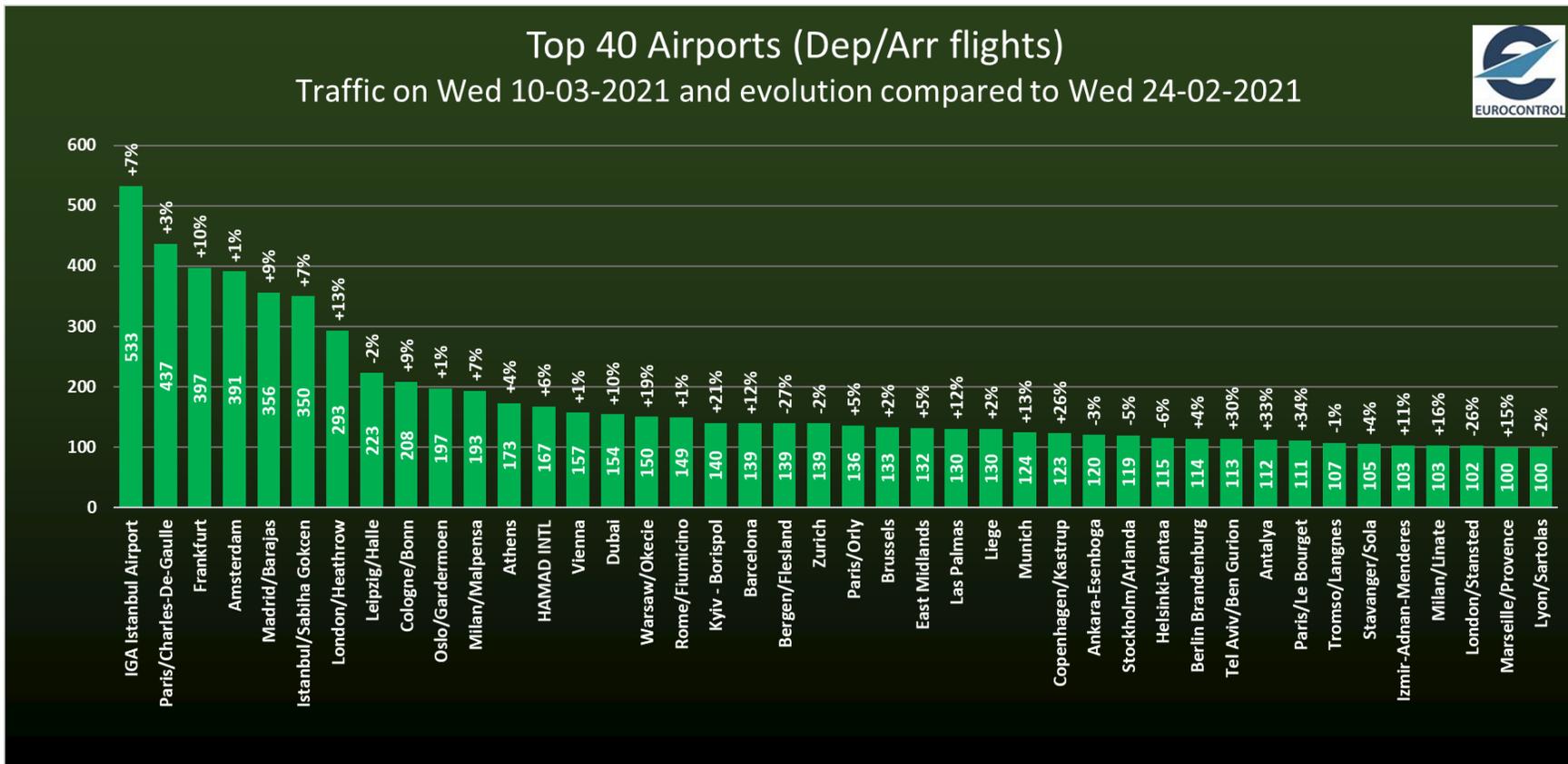
- ✘ **Tel Aviv Ben Gurion** February passenger numbers down 9.6% year-on-year (-87.5% domestic, -98.2% international), cargo down 7.9%.
- ✘ **Flughafen Wien Group** reports a net loss in 2020 of €75.7M; expects 2021 passenger numbers to reach about 40% of the 2019 level.

Worldwide airports

- ✘ **Seoul Incheon Airport** reports February passenger numbers down 95% year-on-year, cargo up 8%.

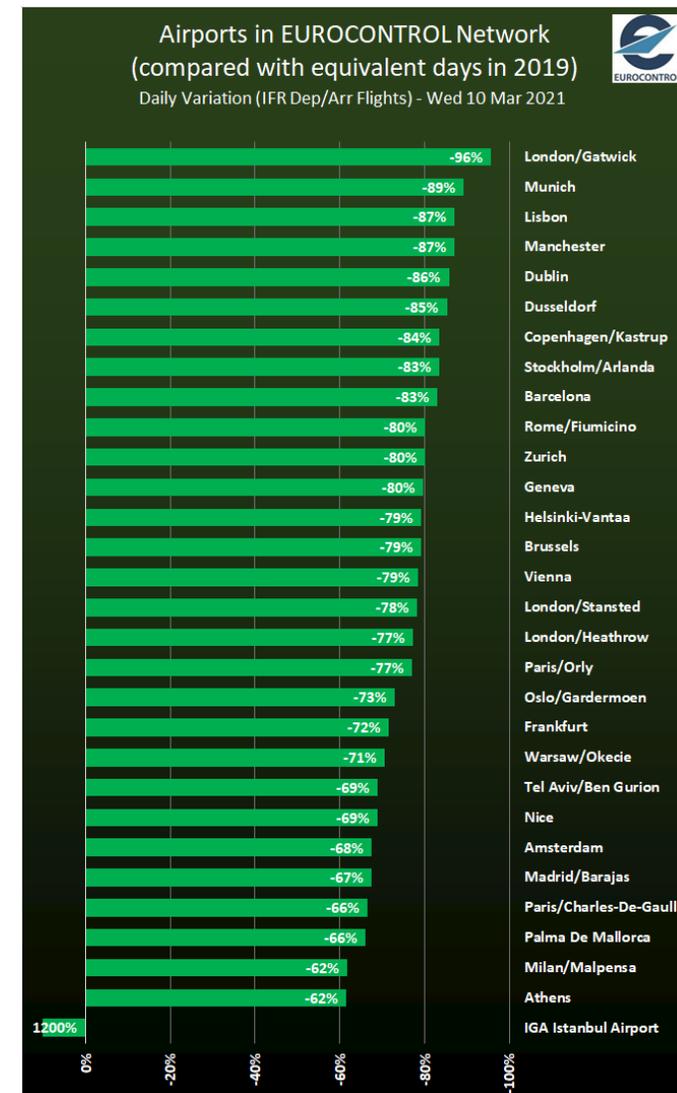
Airports (Daily Departure/Arrival flights)

Latest operations



✘ On 10 March 2021, traffic levels per airports record declines ranging from -62% (Athens) to -96% (London/Gatwick), compared to same day in 2019.

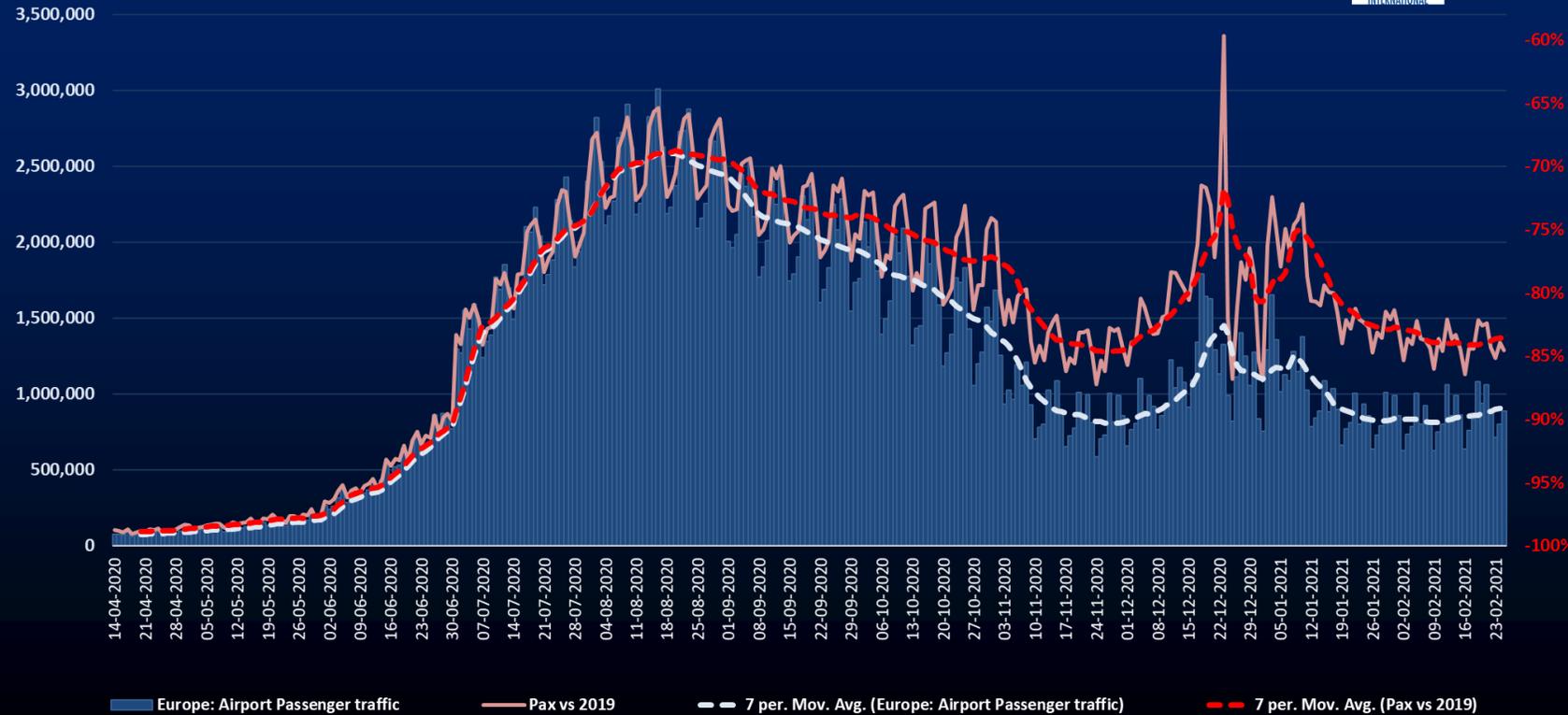
Note: IGA Istanbul Airport was not in operation in early 2019 and therefore the comparison will be meaningless until mid-April.



Passengers



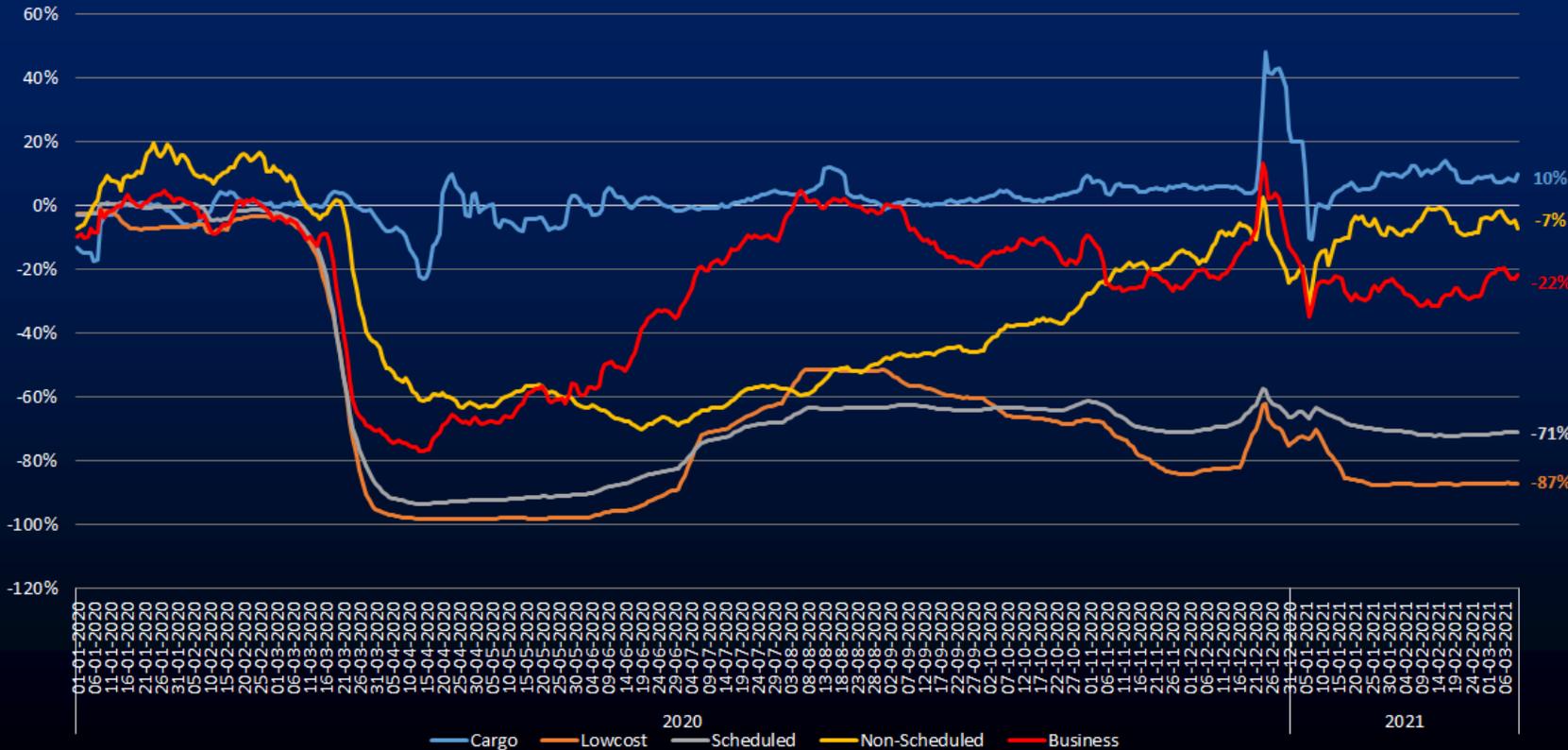
Europe: Airport Passenger Traffic Comparison with 2019



✘ ACI recorded just below 886,000 passengers on 25 February 2021, a **loss of 4.8 million passengers** compared to the equivalent day in 2019 (i.e. **-85%**).



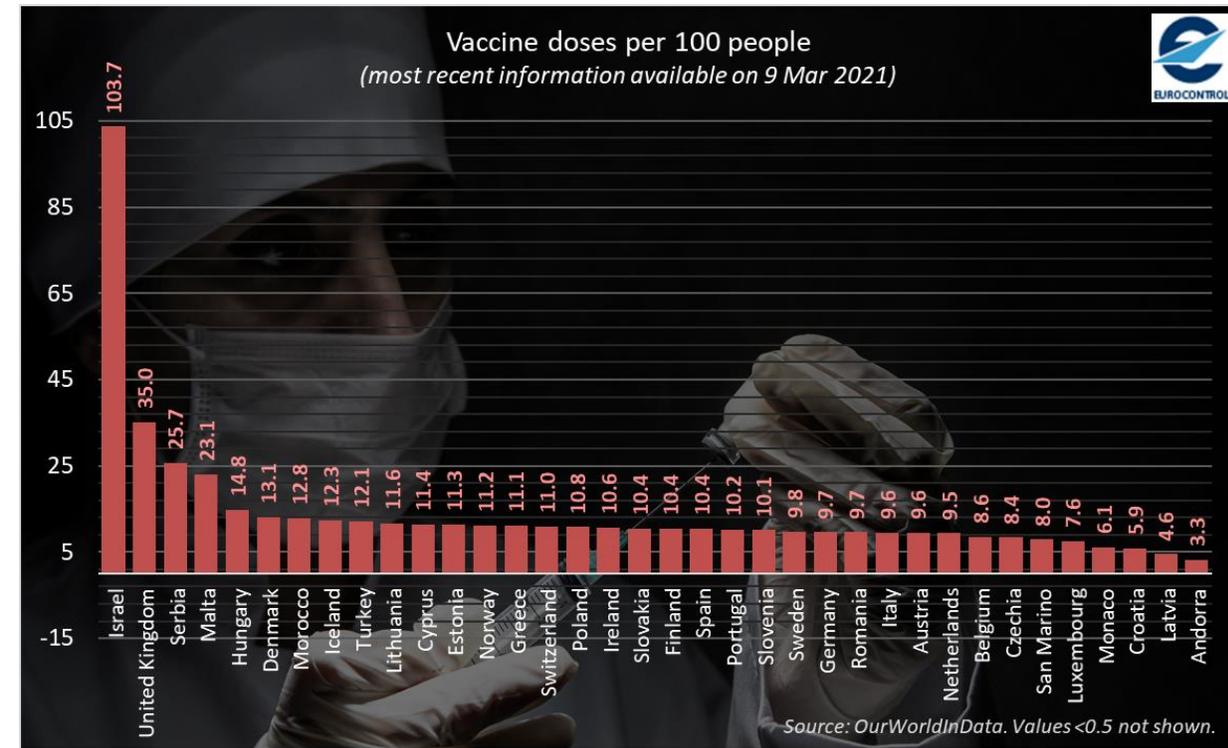
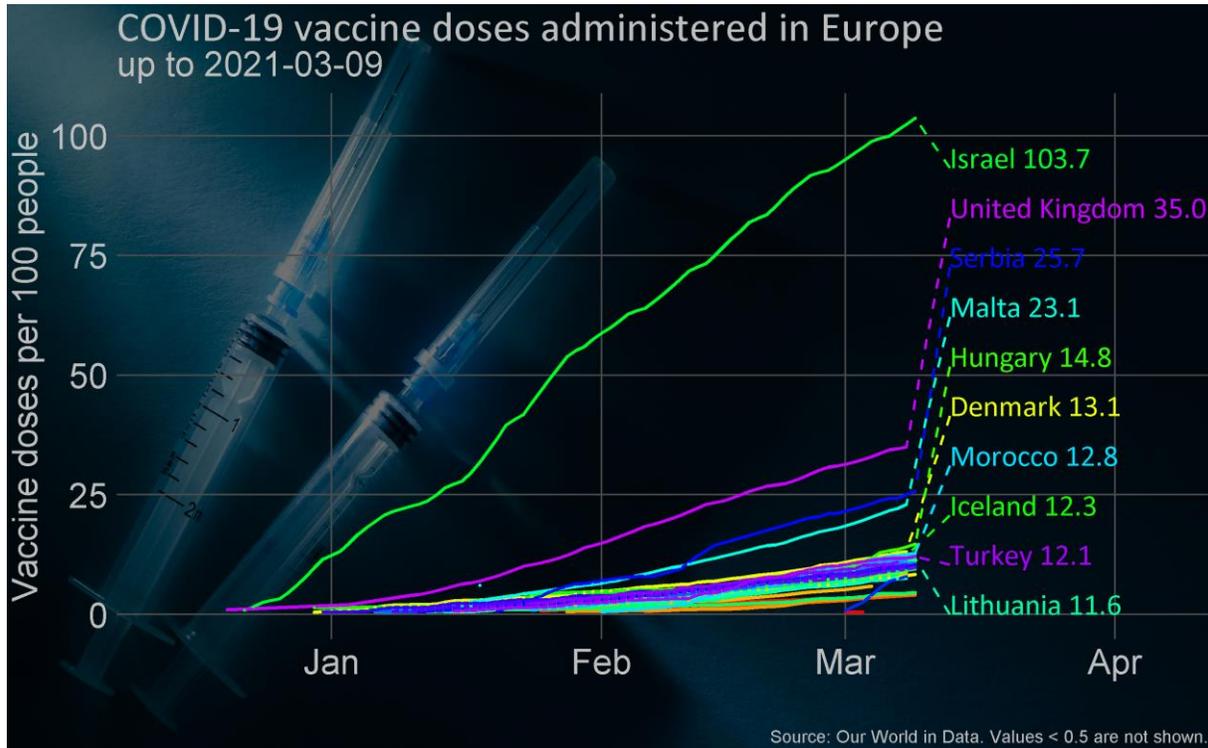
Market segments in EUROCONTROL Network
(compared with equivalent days in 2019)
Daily Variation (Flights)



On 10 March 2021, all segments showed unchanged trends since mid-January 2021 (vs 2019):

- ✘ **All-cargo** is the only segment consistently growing, posting a **+10%** increase. **Charter** (-7%) is getting closer to the 2019 levels.
- ✘ **Business Aviation** recorded a decrease of **-22%**.
- ✘ **Traditional and Low-Cost**, while accounting the majority of flights, recorded (stable) declines at **-71%** and **-87%** respectively.

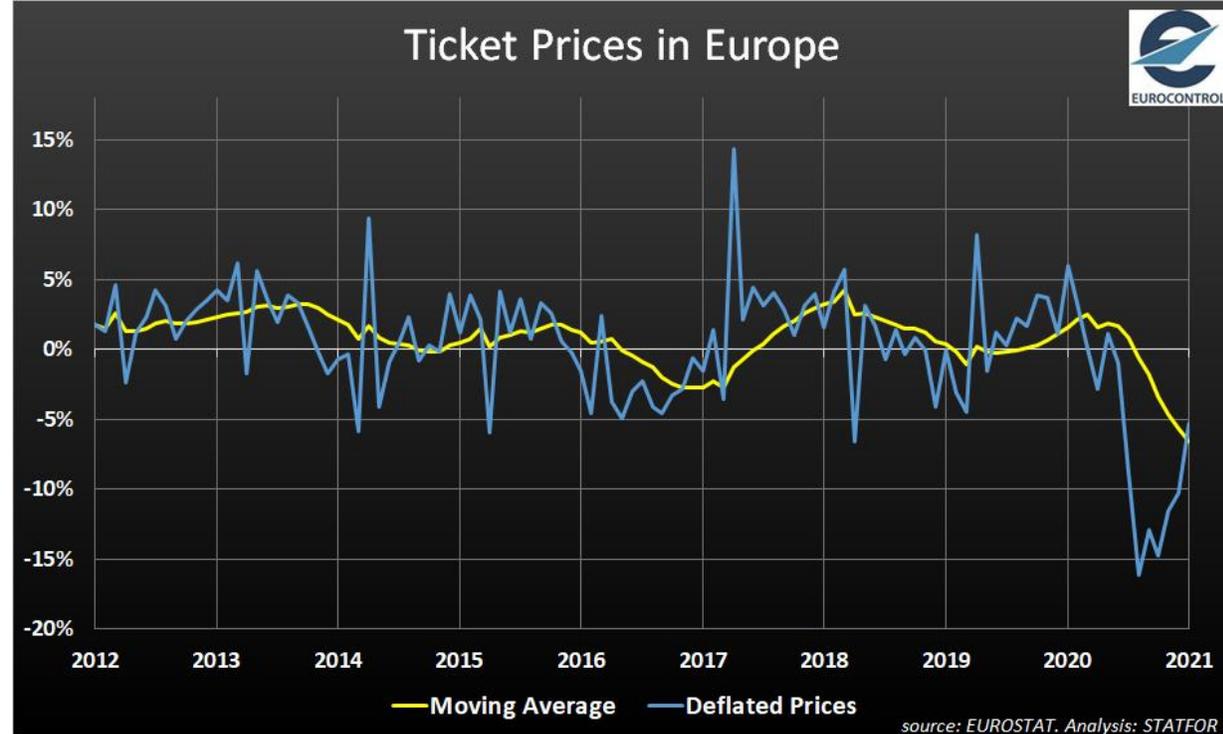
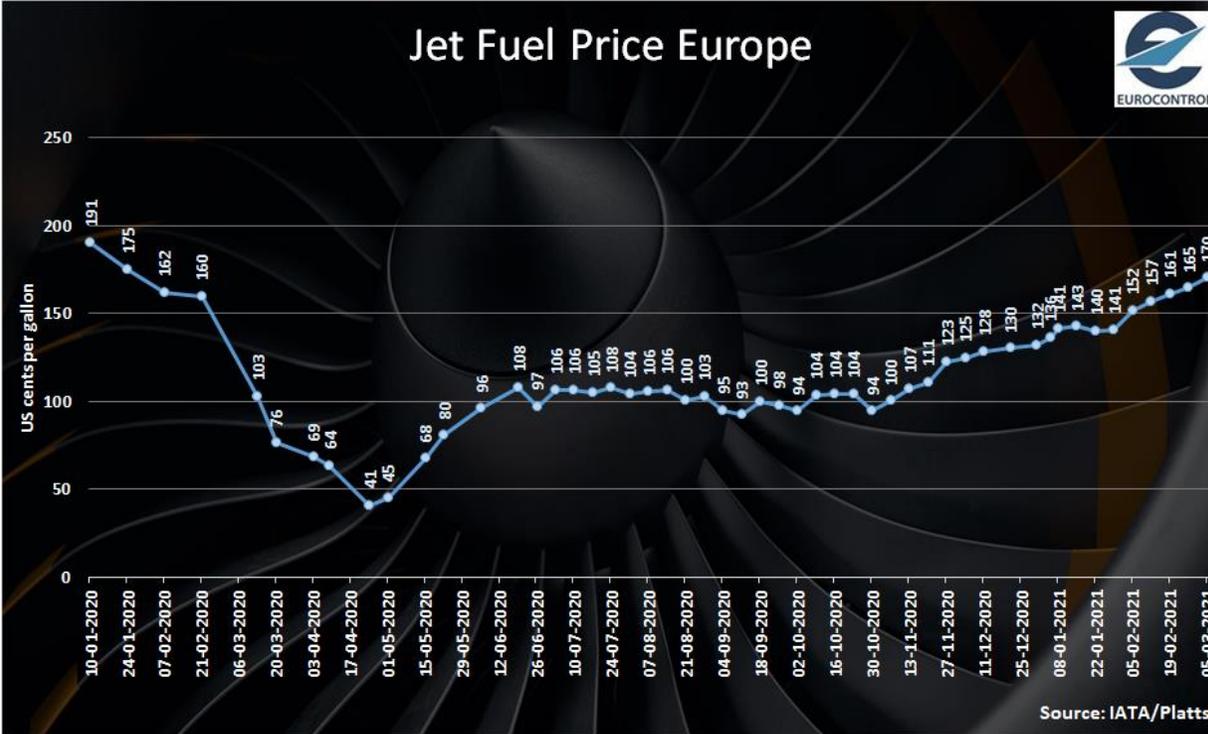
Vaccination updates



✘ 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 on the left graph.

✘ On the right one: only Israel, UK and Serbia have reported that more than 25% doses per hundred people early March.

Graphs are showing data for the 41 Member and 2 Comprehensive Agreement States of EUROCONTROL.



- ✘ **Jet fuel prices** have started to rise in February, from around 150 cts/gal early February to 170 cts/gal on 5 March 2021.
- ✘ Current **fuel prices** are comparable to early February 2020 levels, just before the COVID-19 outbreak start.

- ✘ **Ticket prices** in Europe decreased by 5.3% in January 2021 (compared with the same period in 2020).
- ✘ The **ticket prices trend** (12-month trailing average) showed a 6.6% decline in January 2021, still quite affected by the huge decreases in prices recorded during Summer 2020.

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.



For more information please contact aviation.intelligence@eurocontrol.int



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