

15 April 2021



# COVID 19 **IMPACT ON** EUROPEAN AVIATION

EUROCONTROL  
Comprehensive Assessment



SUPPORTING EUROPEAN AVIATION



NETWORK  
MANAGER



# Headlines

- 10,945 flights (35% of 2019 levels) on Wednesday 14 April 2021, decreasing over 2 weeks (-8%) but stable over 1 week (Wednesday 7 April 2021).
- Traffic is levelling off after the Easter break period. Flows between North-West Europe and Spain/Italy are recording declines (over 2 weeks).
- Highest decreases for Germany, France, Spain and Turkey. Increase for Italy (domestic).
- Highest decreases for Vueling (-55%), Turkish (-9%), Lufthansa (-17%) and Wizz (-44%). Increases for Alitalia (+32%), Ryanair(+15%) and Eurowings (+27%).
- Domestic traffic vs 2019: Europe (-67%), US (-29%), China (+9%), Middle-East (-45%).

## Top 10 Aircraft Operators

on Wed 14 April 2021 (daily flights)



2. Operated **362 flights**  
**↓69%**  
 of same day in 2019  
**↓11%** over 2 weeks



3. Operated **324 flights**  
**↓8%**  
 of same day in 2019  
**↑2%** over 2 weeks



1. Operated **684 flights**  
**↓46%**  
 of same day in 2019  
**↓9%** over 2 weeks



4. Operated **304 flights**  
**↓80%**  
 of same day in 2019  
**↓17%** over 2 weeks



5. Operated **276 flights**  
**↑5%**  
 of same day in 2019  
**↓3%** over 2 weeks



6. Operated **264 flights**  
**↓64%**  
 of same day in 2019  
**↑1%** over 2 weeks



7. Operated **258 flights**  
**↓41%**  
 of same day in 2019  
**↓10%** over 2 weeks



8. Operated **246 flights**  
**↓90%**  
 of same day in 2019  
**↑15%** over 2 weeks



9. Operated **182 flights**  
**↓76%**  
 of same day in 2019  
**↓16%** over 2 weeks



10. Operated **181 flights**  
**↓68%**  
 of same day in 2019  
**↑32%** over 2 weeks

## Traffic Situation

Daily flights (including overflights)



Traffic over the last 7 days is

**↓64%**

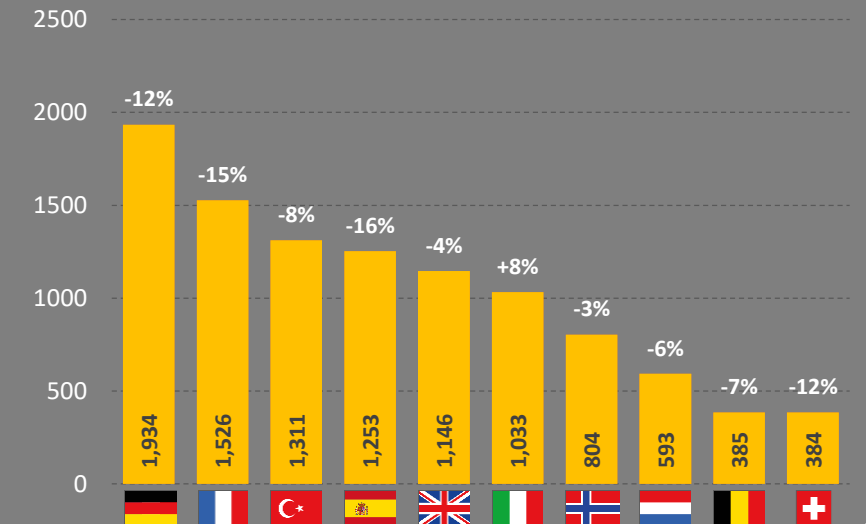
Compared to equivalent days in 2019

[Note: Easter this year (4 April 2021) is almost 3 weeks earlier than in 2019 (21 April 2019)]

## Top 10 Busiest States

on Wed 14 April 2021

(Dep/Arr flights and variation over 2 weeks)



# Top 10 Busiest Airports

7-day average Dep/Arr flights on 8-14 April, compared to 2019

Top 10 Airports	Average flights per day (week 8-14/4)	Average flights per day (week 8-14/4) vs 2019
IGA Istanbul Airport	641	-43%
Frankfurt	526	-64%
Paris/Charles-De-Gaulle	480	-67%
Amsterdam	472	-67%
Madrid/Barajas	403	-65%
Istanbul/Sabiha Gokcen	395	-35%
London/Heathrow	348	-74%
Palma De Mallorca	242	-62%
Munich	233	-80%
Athens	218	-62%

## Traffic Flow

On 14 April, the **intra-European** traffic flow was

**8,143**  
flights

**- 10%**  
over past 2 weeks

**-67%**  
compared to 2019

## Market Segments

On 14 Apr, compared to 2019



**↓ 84%**

Low cost



**↓ 68%**

Traditional



**↓ 19%**

Business Aviation



**↓ 7%**

Non-Scheduled/  
Charter



**↑ 11%**

All Cargo

## Economics

(07 April 2021)

Fuel price

**↑ 158**

**Cents/gallon**

compared to 156 cents/gallon  
on 01 Apr 21

Source: IATA/Platts

## Route charges

(March 2021)

Amount billed:

**€ 190 million**

Jan-Mar 2021 amount billed:

**€ 541 million**  
vs. Jan-Mar 2019

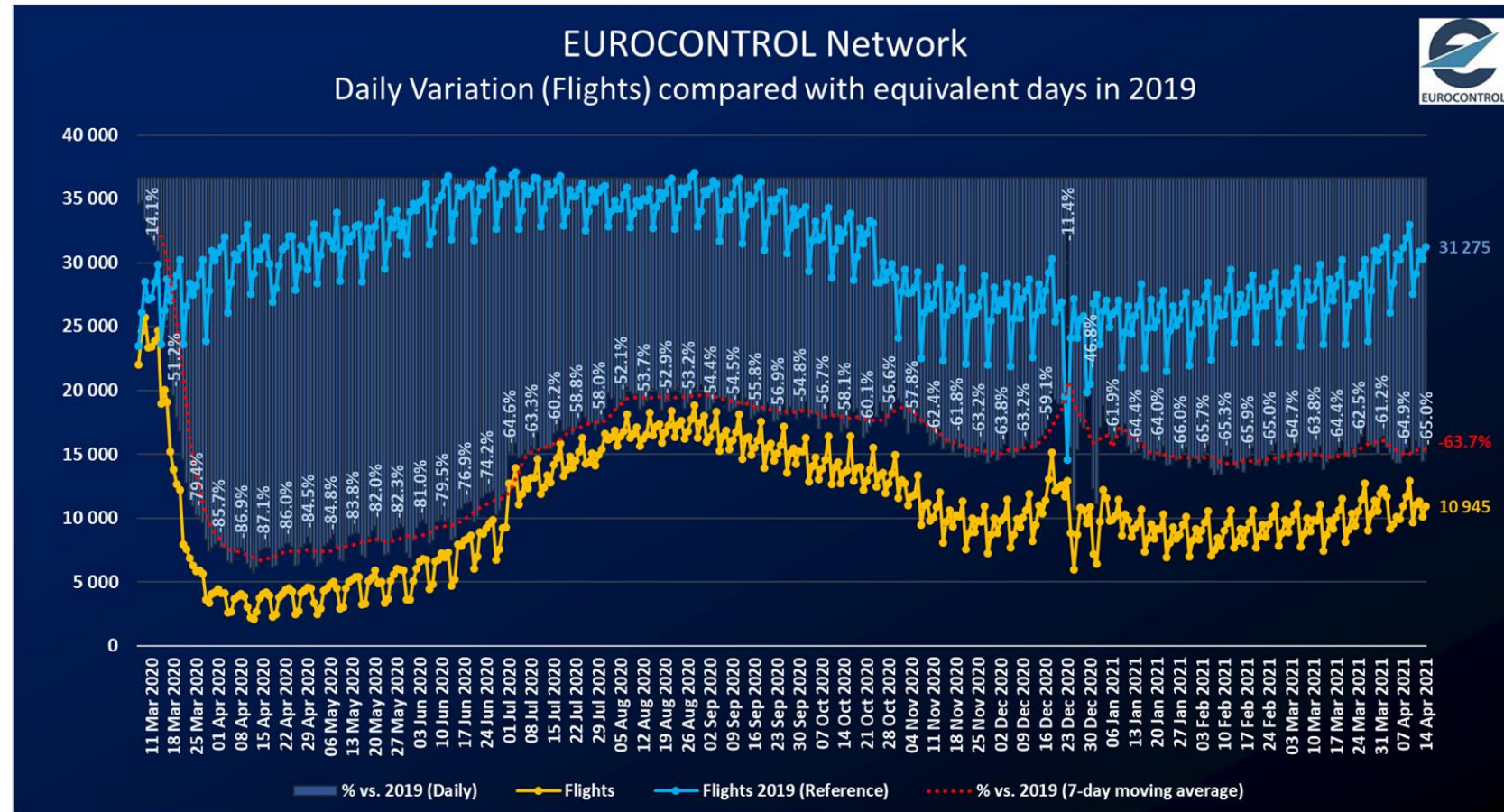
**↓ (-67%)**

Source: EUROCONTROL

# Overall traffic situation at network level



- ✂ **10,945 flights** on Wednesday 14 April.
- ✂ **-8%** with **-984 flights** over 2 weeks (from Wednesday 31 March).
- ✂ **Stable** with **-12 flights** over 1 week (from Wednesday 7 April).
- ✂ **36%** of 2019 traffic levels.





# Current situation and scenarios

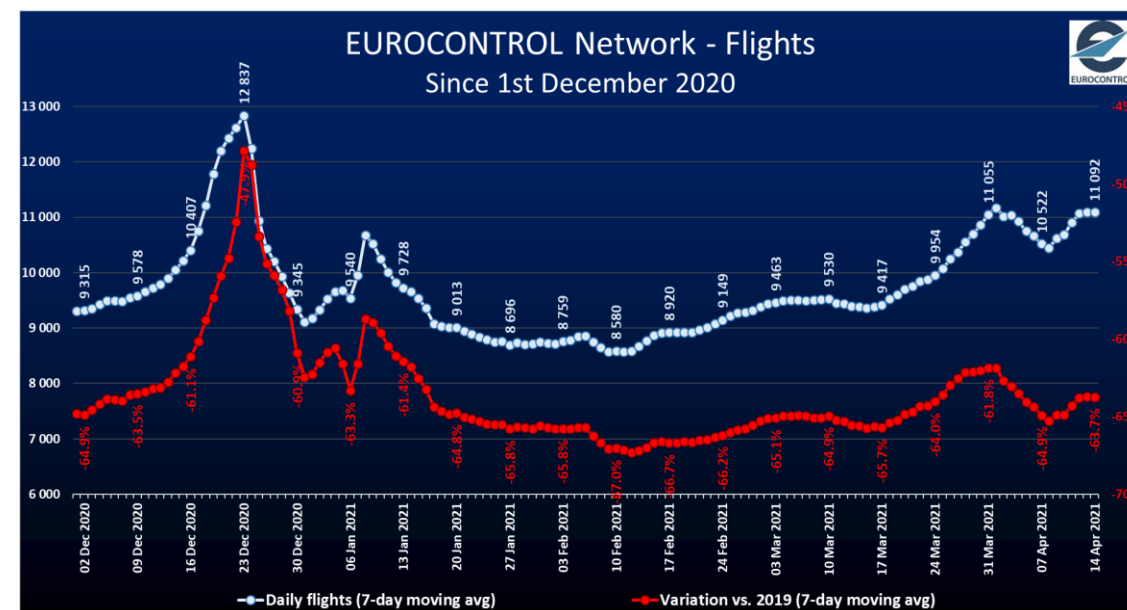
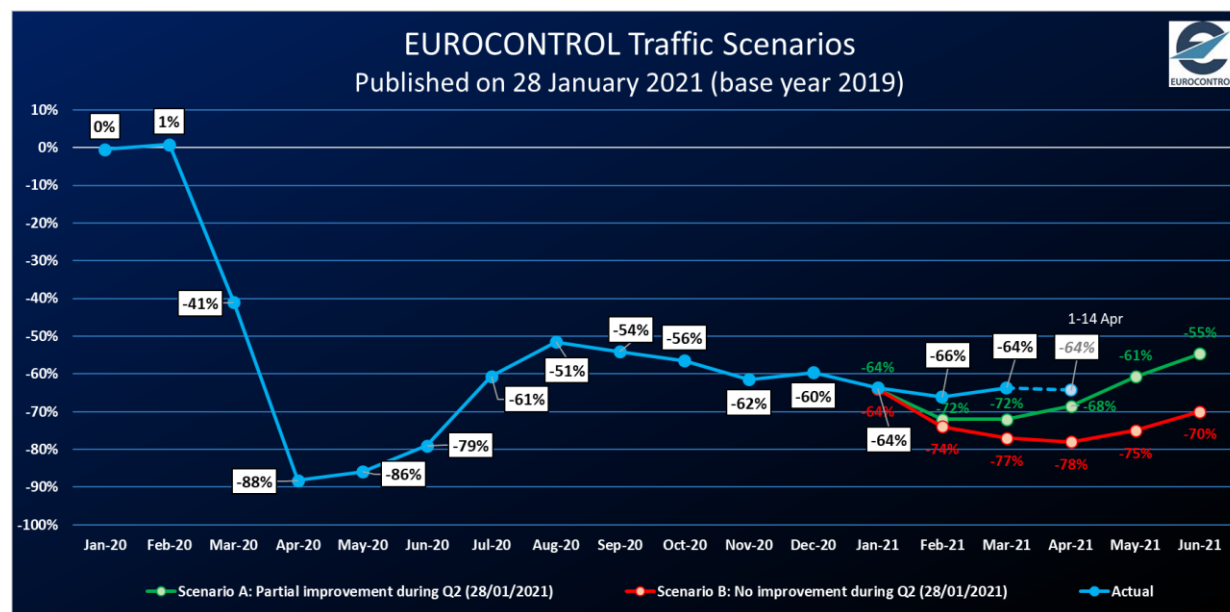
✖ **Traffic at -64% on 1-14 April 2021 vs 1-14 April 2019**, slightly above the latest EUROCONTROL traffic scenarios published on 28 January 2021 mainly due to:

- Very active cargo traffic.
- Easter holidays started in March compared to April in 2019.

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 maximum at network level at the end of March (around Easter), **the traffic is now stable over the recent days.**

✖ A large part of the increase vs 2019 is due to the fact that **Easter this year (4 April 2021) is almost 3 weeks earlier than in 2019 (21 April 2019).**



# Aircraft operators (Daily flights)

Top 10

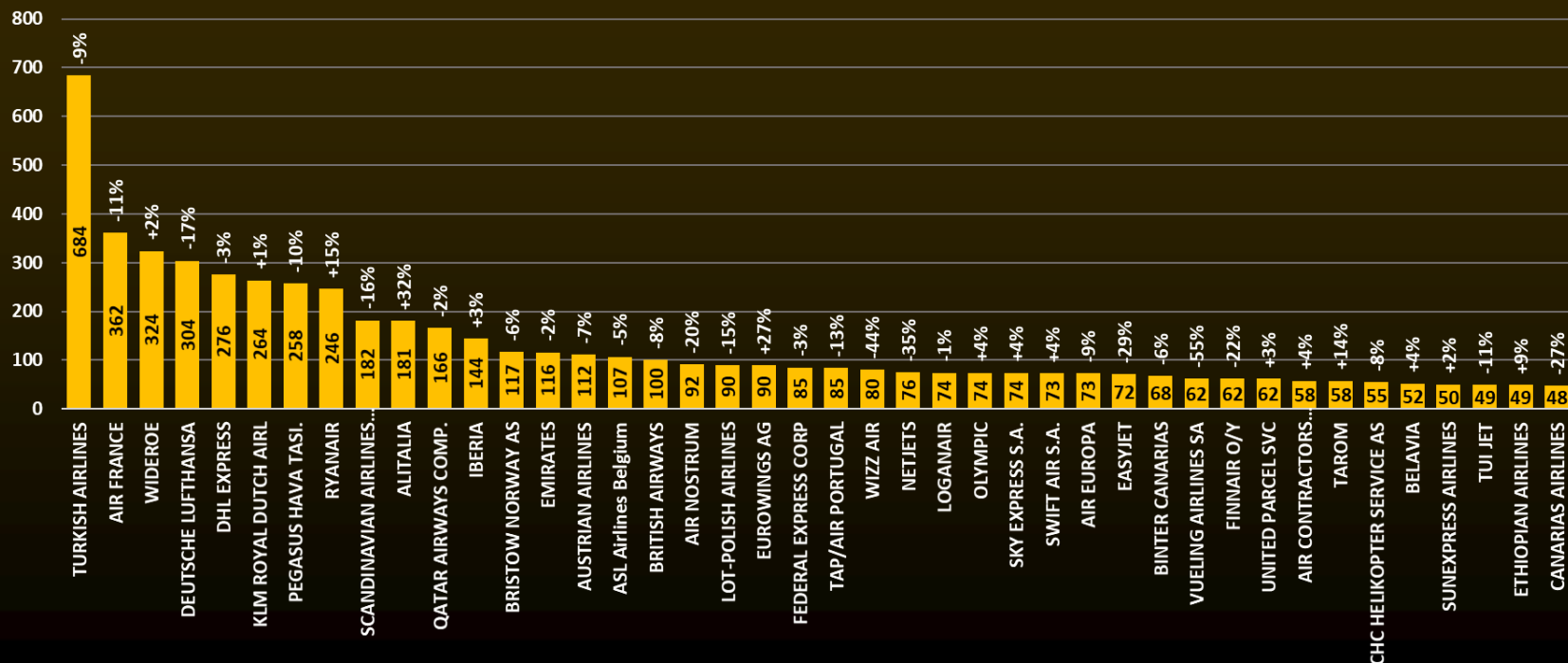
Rank evolution over 2 weeks	Top 10 Aircraft Operators on Wed 14-04-2021					EUROCONTROL
	Aircraft Operator	Flights	Δ over 2 weeks	% over 2 weeks	% vs 2019	
→	TURKISH AIRLINES	684	↓ -71	-9%	↓ -46%	
→	AIR FRANCE	362	↓ -44	-11%	↓ -69%	
↗	WIDEROE	324	↗ +6	+2%	↓ -8%	
↓	DEUTSCHE LUFTHANSA	304	↓ -62	-17%	↓ -80%	
→	DHL EXPRESS	276	↓ -10	-3%	↗ +5%	
↗	KLM ROYAL DUTCH AIRL	264	↗ +2	+1%	↓ -64%	
↓	PEGASUS HAVA TASI.	258	↓ -28	-10%	↓ -41%	
↗	RYANAIR	246	↗ +32	+15%	↓ -90%	
↓	SCANDINAVIAN AIRLINES SYSTEM	182	↓ -35	-16%	↓ -76%	
↗	ALITALIA	181	↗ +44	+32%	↓ -68%	

- ✖ **Turkish Airlines** is the busiest airlines over the last 2 weeks. Despite a 9% decline, some growth on **intercontinental** flows from/to Turkey (Russia, Israel, Malaysia, India, China)
- ✖ Positive change in the ranking over 2 weeks for **Wideroe**, **KLM**, **Ryanair** and **Alitalia**.
- ✖ Highest increase for **Alitalia** (+32%) and **Ryanair** (+15%) driven by domestic increase in Italy. **Ryanair** recorded (more limited) increased on Spain domestic too.
- ✖ **Lufthansa** decline hides a small increase for **Eurowings** on Germany-Austria flow.

# Aircraft operators (Daily flights)

## Top 40 – Latest operations

**Aircraft operators**  
Traffic on Wed 14-04-2021 and evolution compared to Wed 31-03-2021



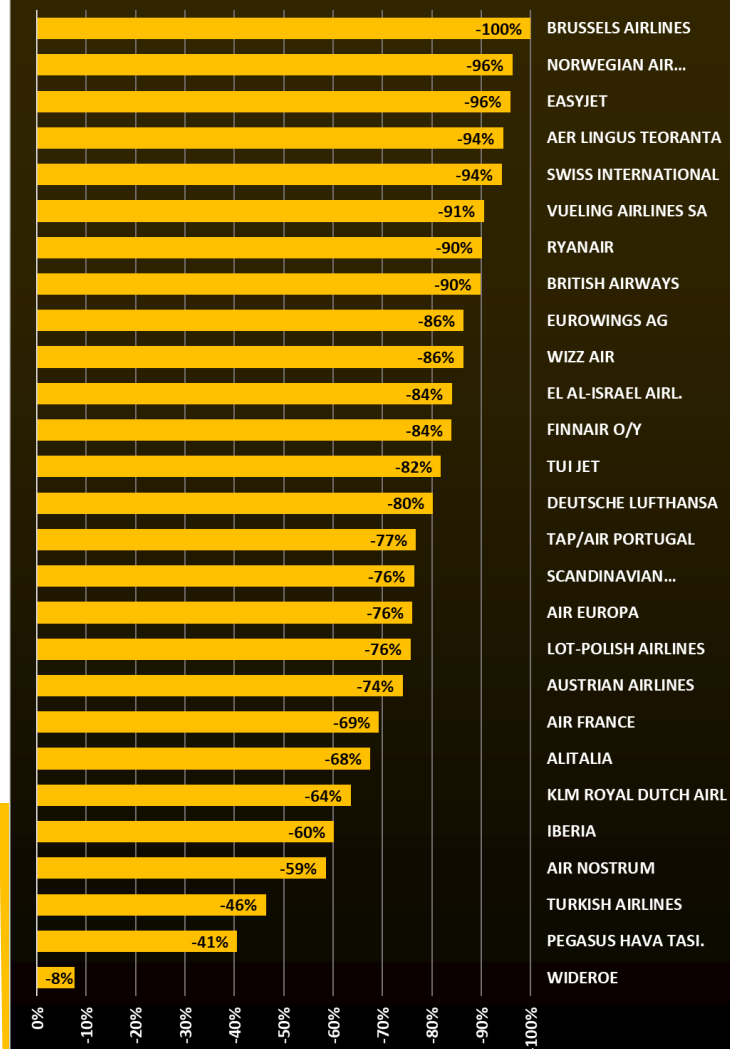
✘ Highest decreases for Vueling (-55%), Turkish (-9%) , Lufthansa (-17%) and Wizz (-44%).

✘ Highest increases for Alitalia (+32%), Ryanair(+15%) and Eurowings (+27%).

✘ Ryanair 8<sup>th</sup>, British Airways 17<sup>th</sup>, Wizz Air 23<sup>rd</sup> and easyJet 30<sup>th</sup>.

✘ Traffic levels ranging from -100% (Brussels Airlines) to -8% (Wideroe) compared to 2019

Aircraft Operators in EUROCONTROL Network  
(compared with equivalent days in 2019)  
Daily Variation (IFR Flights) - Wed 14 Apr 2021



# Aircraft operators

## Latest news

### European airlines

- ✂ **Air France** plans to operate 80 seasonal services this summer, including 22 new services, to France, Europe and North Africa.
- ✂ **El Al** plans to raise at least \$105 million through an offering of shares and/or options.
- ✂ **Finnair** reports March passenger numbers down 82.7% year-on-year (March 2020 was 56% down on 2019).
- ✂ **IAG Cargo** reports that it has delivered 2.5 million vaccines to the Latin America and Caribbean region this year.
- ✂ **Iberia** to trial IATA Travel Pass on Madrid to Montevideo service.
- ✂ **Jet2.com** and **Jet2holidays** extend suspension of operations, having reviewed the latest UK Global Travel Taskforce framework.
- ✂ **Lufthansa** starts converting an A350-900 into a climate research aircraft.
- ✂ **Norwegian** resumes twice weekly routes from Stockholm to Alicante, Malaga and Oslo; March passenger numbers were down 94% on March 2020.



- ✂ **Ryanair** expects a pretax loss for the year to 31 March 2021 of between €800 and 850 million, a slight improvement on the previous forecast.

### Worldwide airlines

- ✂ **Air Canada** enters into financing agreements with the Canadian government for up to CAD5.9 billion.
- ✂ **Air New Zealand** CEO states that trans-Tasman bookings have been very good with Auckland Sydney Brisbane and Melbourne the strongest in terms of volumes.
- ✂ **Cathay Pacific Cargo** cuts capacity by 25% in March due to Hong Kong crew quarantine measures.
- ✂ **Ethiopian Airlines** has flown 5,645 cargo flights using passenger aircraft, with seven of its 16 A350-900s having their seats removed.
- ✂ **Qantas Group CEO** states that the business is generating positive cash flows at operating level; reopens 33 of its 35 domestic lounges; looks to resume international travel in October.
- ✂ **Singapore Airlines** received three new A350-900s.



# States (Daily Departure/Arrival flights)

Top 10

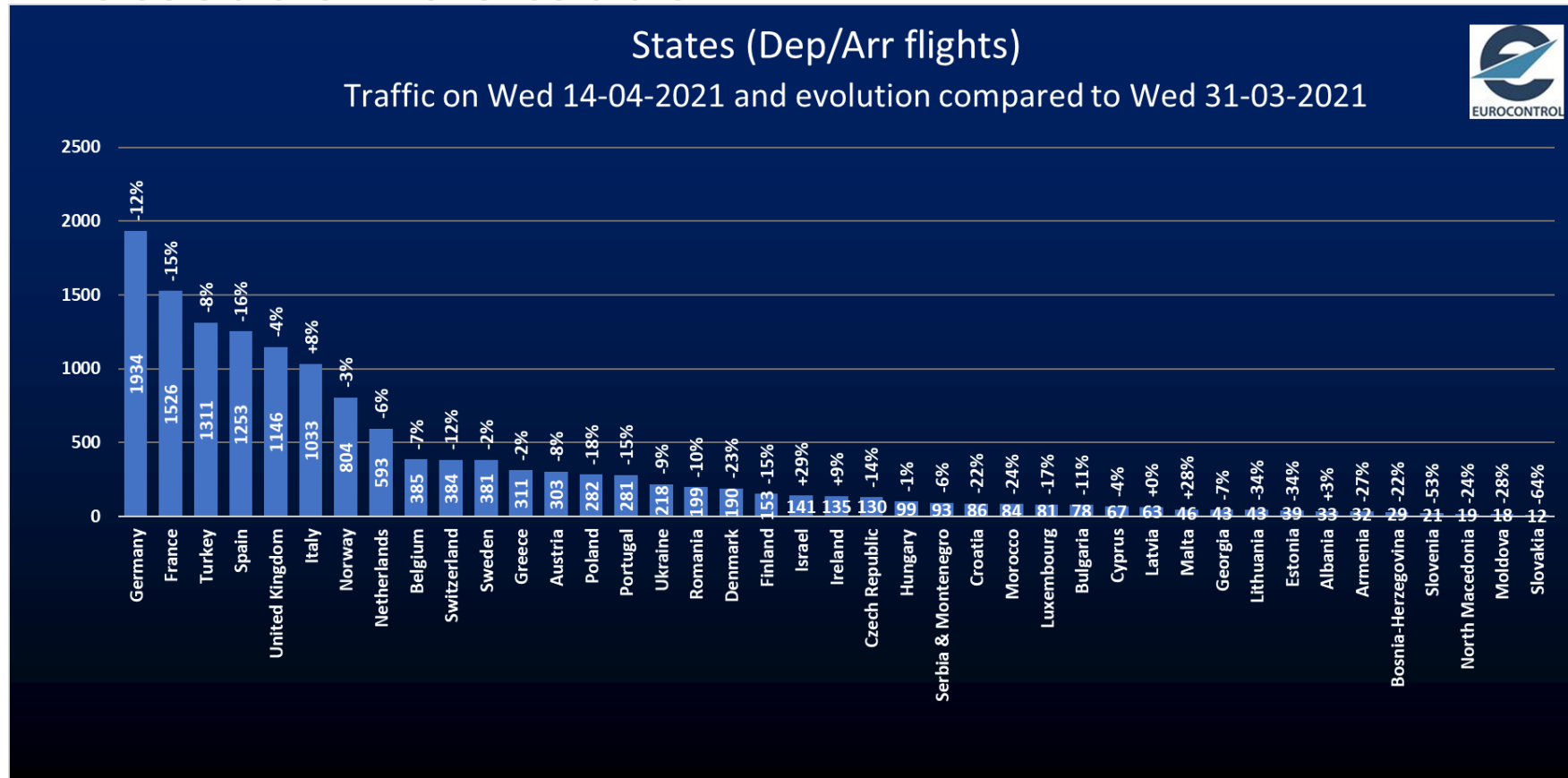


Rank evolution over 2 weeks	Top 10 States on Wed 14-04-2021					EUROCONTROL	
	State	Flights (Dep/Arr)	Δ over 2 weeks	% over 2 weeks	% vs 2019		
→	Germany	1934	↘ -263	-12%	↘ -68%		
→	France	1526	↘ -260	-15%	↘ -67%		
↗	Turkey	1311	↘ -111	-8%	↘ -48%		
↘	Spain	1253	↘ -241	-16%	↘ -74%		
→	United Kingdom	1146	↘ -47	-4%	↘ -81%		
→	Italy	1033	↗ +75	+8%	↘ -73%		
→	Norway	804	↘ -21	-3%	↘ -42%		
→	Netherlands	593	↘ -39	-6%	↘ -66%		
↗	Belgium	385	↘ -29	-7%	↘ -63%		
↘	Switzerland	384	↘ -50	-12%	↘ -72%		

- ✖ After relative increases on some destinations in traffic for Easter break (early April), main European States record decreases: Germany (-12%), France (-15%), Spain (-16%) and Switzerland (-12%), due to decreases in domestic and flows between North-West Europe and Spain or Italy.
- ✖ Highest increase for Italy (+8%) mainly driven by domestic flows (traffic from Ryanair and Alitalia).

# States (Daily Departure/Arrival flights)

## Latest traffic situation



- ✗ Highest decreases for Germany (-12% over 2 weeks), France (-15%), Spain (-16%) and Turkey (-8%).
- ✗ Highest increases for Italy (+8%) and Israel (+29%).
- ✗ Traffic levels ranging from -87% (Slovakia) to -38% (Armenia), compared to 2019.

# Associations and Institutions

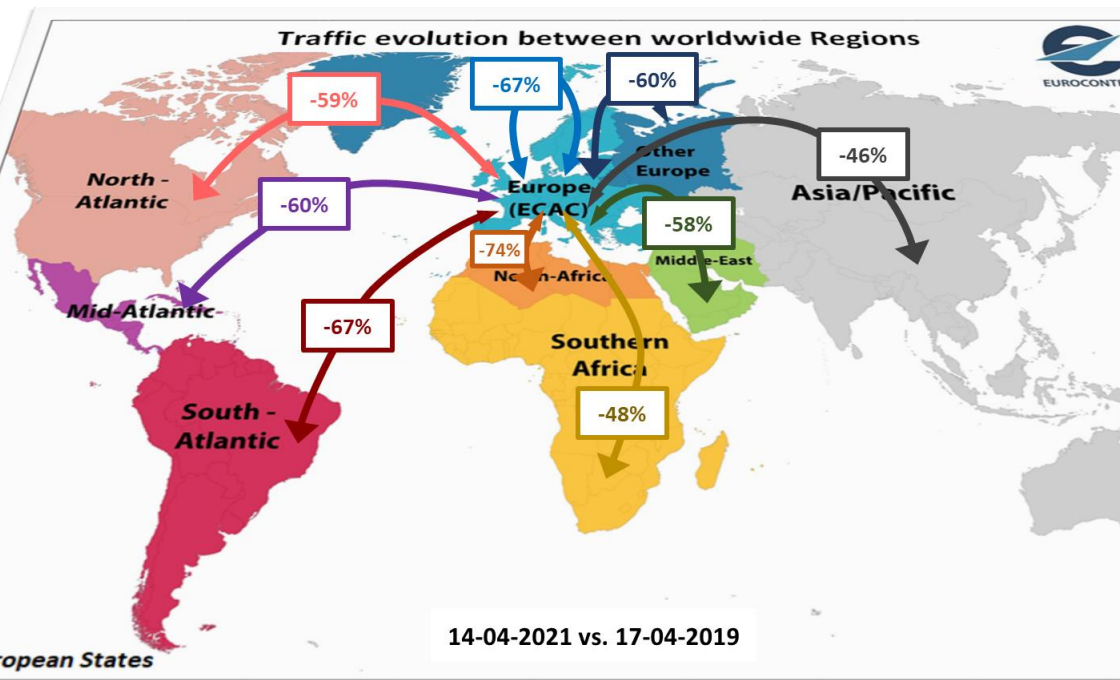


- ✂ **Airbus** delivered 72 aircraft to 354 customers in March and received orders for 28 aircraft; so far this year it has received 39 orders and 100 cancellations.
- ✂ **Boeing** working to solve a potential issue with a backup power control unit on some 737 MAX aircraft; reports 77 commercial aircraft deliveries in Q1, including 63 737s.

- ✂ **Greece** to open its borders on 14 May to those who are fully vaccinated or have a negative test result. Random rapid tests will be carried out.
- ✂ **Malta** reports that 18 airlines plan to resume flights to Malta this summer, with capacity of around 70% pre-COVID levels.
- ✂ **Russia** restricts air services with **Turkey** until 1 June due to the status of the pandemic in Turkey.
- ✂ **US TSA** reports passenger screening numbers of 55%-65% (compared to 2019) during March/April.
- ✂ **UK Global Travel Taskforce** plans to restart international travel (from 17 May at the earliest) using a traffic light system; plans criticized by Airlines UK.

# Traffic flows (Daily Departure/Arrival flights)

- ✂ The main traffic flow is the intra-Europe flow with 8,143 flights on Wednesday 14 April, which is decreasing (-10%) over 2 weeks.
- ✂ Intra-Europe flights are still 67% below 2019 levels while intercontinental flows are running 60% below.



REGION	31-03-2021	14-04-2021	%	vs. 2019
<b>Intra-Europe</b>	<b>9 088</b>	<b>8 143</b>	<b>-10%</b>	<b>-67%</b>
Europe<->Asia/Pacific	418	410	-2%	-46%
Europe<->Mid-Atlantic	67	65	-3%	-60%
Europe<->Middle-East	576	570	-1%	-58%
Europe<->North Atlantic	470	462	-2%	-59%
Europe<->North-Africa	271	248	-8%	-74%
Europe<->Other Europe	345	357	+3%	-60%
Europe<->South-Atlantic	68	57	-16%	-67%
Europe<->Southern Africa	172	167	-3%	-48%
<b>Non Intra-Europe</b>	<b>2 387</b>	<b>2 336</b>	<b>-2%</b>	<b>-60%</b>

# Country pairs (Daily Departure/Arrival flights)

Top 10



Rank evolution over 2 weeks	Top 10 Country-Pair on Wed 14-04-2021					EUROCONTROL
	Country-Pair	Dep/Arr Flights	Δ over 2 week	% over 2 week	% vs 2019	
→	France <-> France	707	↓ -158	-18%	↓ -47%	
↗	Norway <-> Norway	665	↗ +16	+2%	↓ -9%	
↓	Spain <-> Spain	564	↓ -125	-18%	↓ -55%	
→	Turkey <-> Turkey	523	↓ -110	-17%	↓ -42%	
→	Germany <-> Germany	460	↓ -42	-8%	↓ -56%	
→	Italy <-> Italy	442	↗ +53	+14%	↓ -51%	
→	United Kingdom <-> United Kingdom	360	↗ +10	+3%	↓ -68%	
↗	Sweden <-> Sweden	196	↗ +23	+13%	↓ -58%	
↗	Greece <-> Greece	178	↗ +10	+6%	↓ -48%	
↓	Germany <-> Spain	143	↓ -50	-26%	↓ -76%	

- ✖ 9 of the top 10 flows are domestic.
- ✖ Highest decreases for domestic flows in France & Spain (-18%) as well as in Turkey (-17%) explained by Turkish Airlines and Pegasus decreases.
- ✖ Highest increase in flights for domestic flows in Italy (+14%) thanks to Ryanair, and Alitalia increases.
- ✖ Swedish domestic increased too (+13%) owing to rises from local operators.
- ✖ Decrease on Germany-Spain flow (-26%) after the blip driven by Easter break early April.

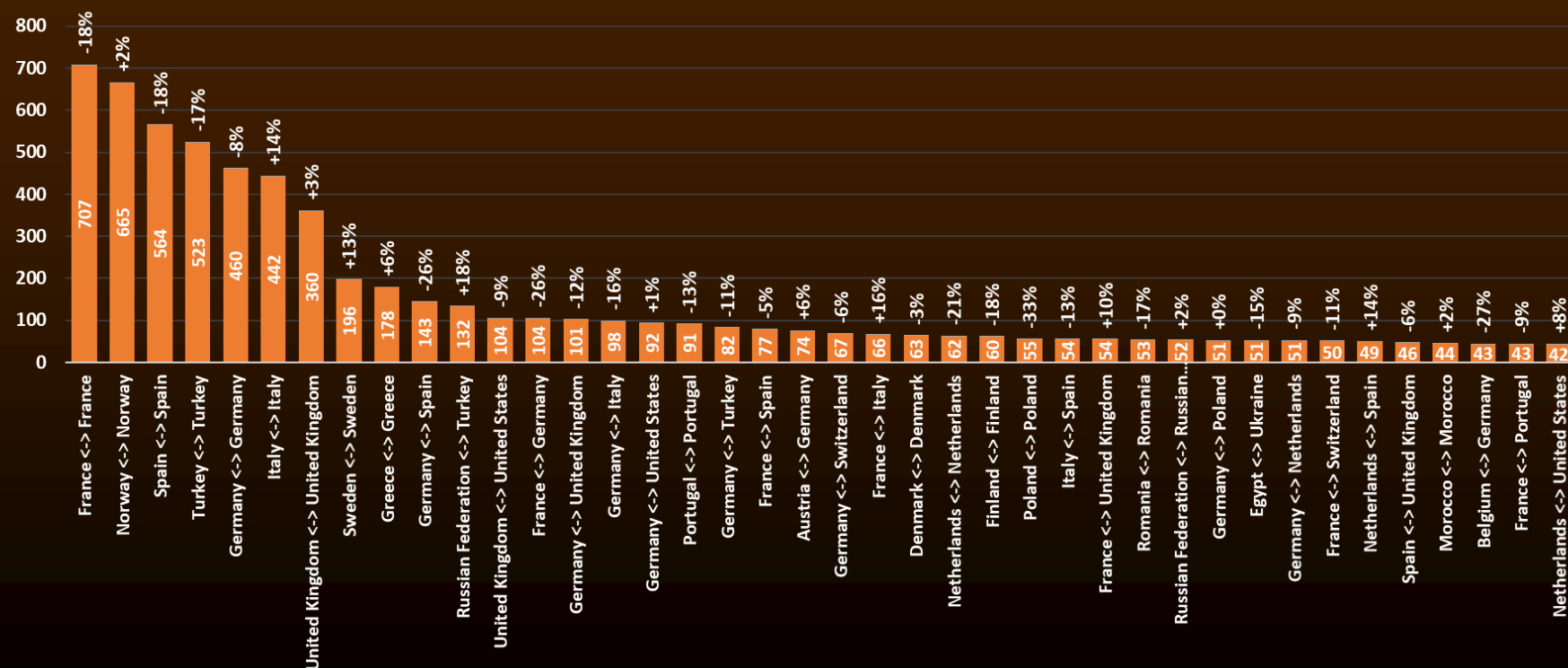


# Country pairs (Daily Departure/Arrival flights)

Latest traffic situation



Top 40 Country-Pairs ( Dep/Arr flights).  
Traffic on Wed 14-04-2021 and evolution compared to Wed 31-03-2021



✈ The busiest non-domestic flows were:

- **Germany-Spain** (143 flights, -26% over 2 weeks).
- **Russia-Turkey** (132, +18%).
- **UK-US** (104, -9%).
- **France-Germany** (104, -26%)
- **Germany-UK** (101, -12%).

# Outside Europe



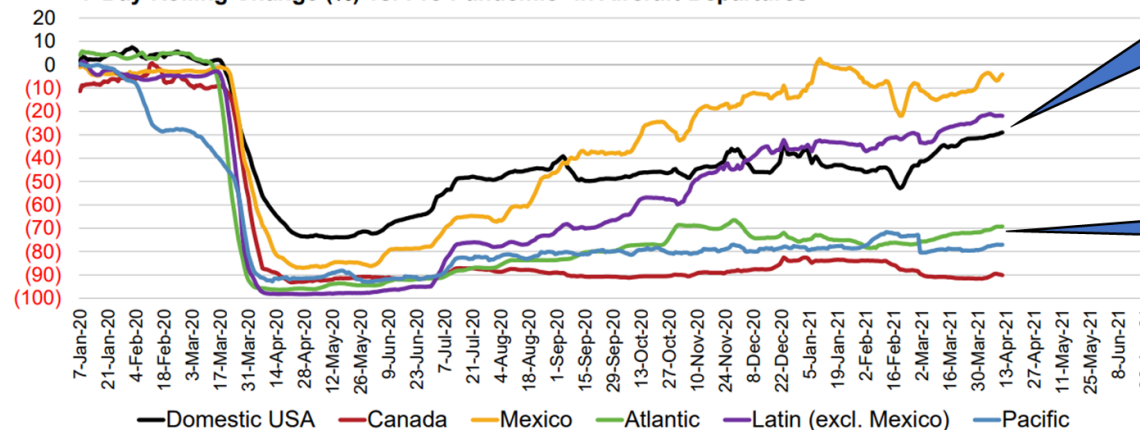
## USA

- ✂ Bookings are gradually improving on rising vaccination rates and easing travel restrictions.
- ✂ US domestic recorded a decline of 29% (vs 2019) and international traffic recorded a decline of 42% (vs 2019) on 13 April.
- ✂ On 13 April, US airline passenger volumes were 29% below 2019 levels with domestic down 36% and international down 56%.
- ✂ The domestic US load factor has improved recently, averaging at 75% on 13 April vs 86% in same week of 2019.
- ✂ In March 2021, U.S. International air travel\* fell 76% below 2019 levels

\* Gateway-to-gateway passengers on U.S. and foreign scheduled and charter airlines and general aviation

**In Most Recent Week, U.S. Passenger Airline Departures Were 30% Below Pre-Pandemic Levels**  
Domestic Flights Operated Down 29%, International Flights Operated Down 42%

7-Day Rolling Change (%) vs. Pre-Pandemic\* in Aircraft Departures



Source: A4A member passenger airlines and branded code share partners

\* "Pre-pandemic" precedes March 1, 2020



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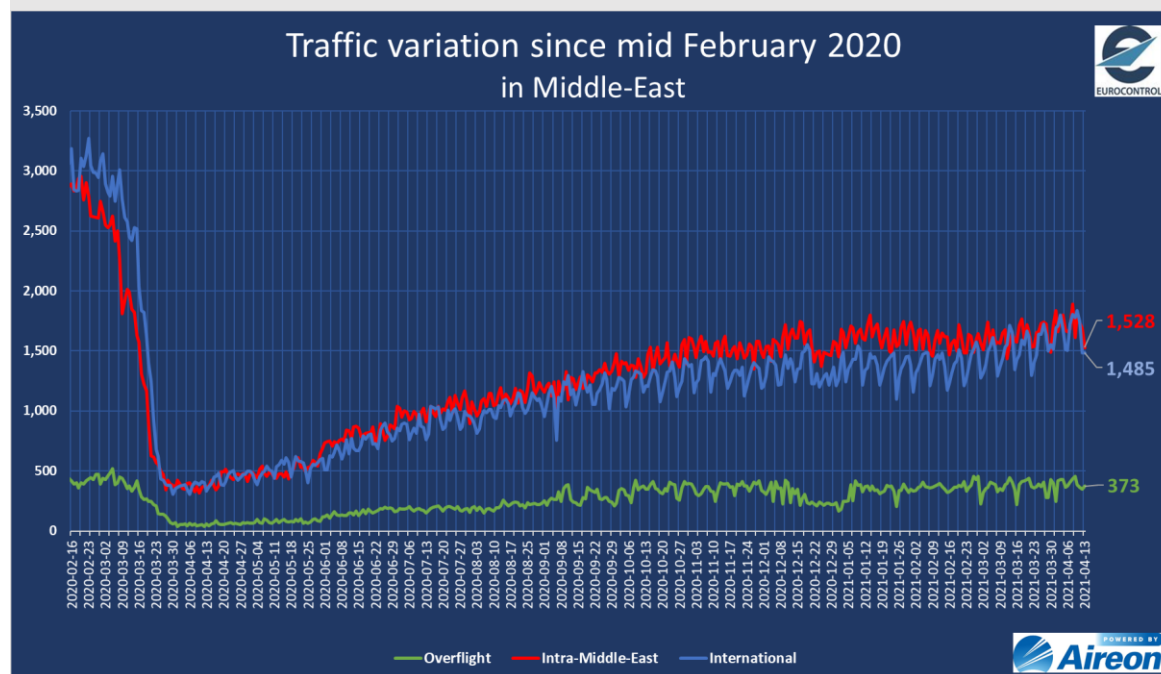
airlines.org

# Outside Europe



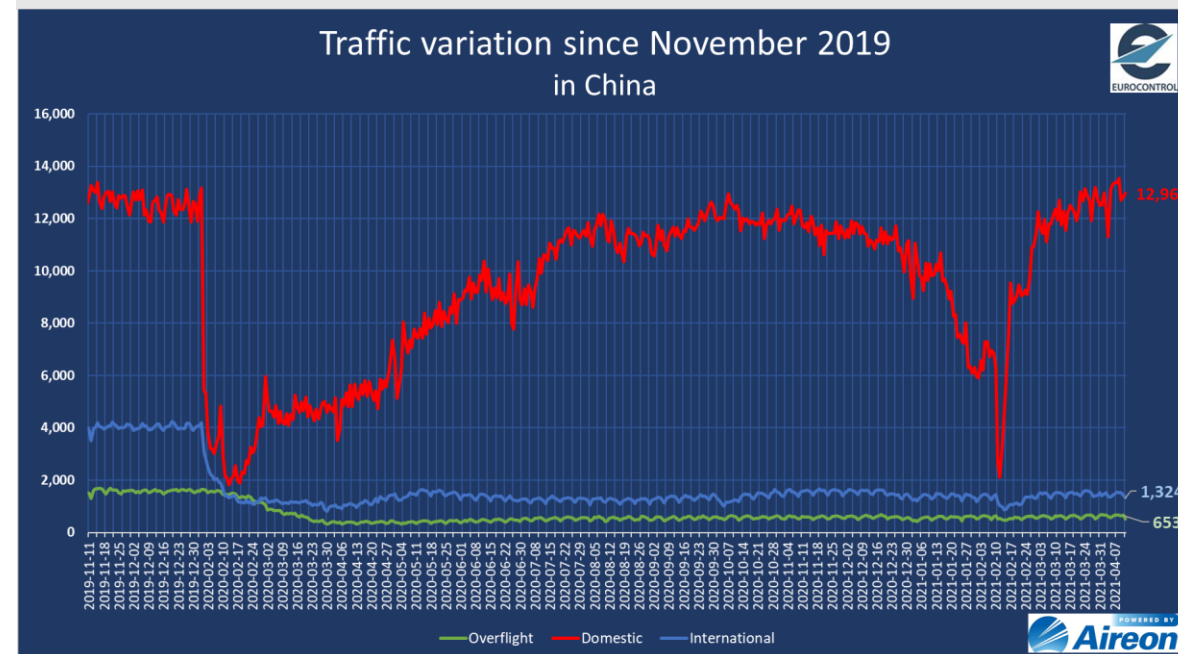
## Middle East

- ✂ Intra-Middle-East traffic recorded around 1,528 daily flights on 13 April (-45% compared to Feb 2020).
- ✂ On 13 April, international traffic from and to Middle-East recorded 1,485 flights (-51% compared to Feb 2020).
- ✂ Overflights have remained stable around 373 flights (-13% compared to Feb 2019) over the recent weeks.



## China

- ✂ On 12 April, domestic traffic recorded just below 13,000 flights (+9% compared to January 2020 levels).
- ✂ International flights and overflights are still suppressed, they were stable on previous weeks with 1,324 and 653 flights respectively (-67% each vs 1 Jan 2020).
- ✂ The CAAC reported a passenger load factor of 64% in January 2021 vs 76.7% in January 2020 vs 81.8% in January 2019.



# Airports (Daily Departure/Arrival flights)

## Top 10 and latest news



Rank evolution over 2 weeks	Top 10 Airports on Wed 14-04-2021					EUROCONTROL
	Airport	Dep/Arr Flights	Δ over 2 weeks	% over 2 weeks	% vs 2019	
→	IGA Istanbul Airport	604	↘ -47	-7%	↘ -47%	
↗	Paris/Charles-De-Gaulle	478	↘ -41	-8%	↘ -67%	
↘	Frankfurt	474	↘ -53	-10%	↘ -68%	
→	Amsterdam	451	↘ -14	-3%	↘ -69%	
→	Madrid/Barajas	414	→ +1	+0%	↘ -65%	
→	Istanbul/Sabiha Gokcen	345	↘ -60	-15%	↘ -42%	
→	London/Heathrow	330	↗ +7	+2%	↘ -76%	
↗	Milan/Malpensa	231	↗ +9	+4%	↘ -62%	
→	Leipzig/Halle	227	↘ -14	-6%	↘ -11%	
↗	Cologne/Bonn	223	↘ -4	-2%	↘ -46%	

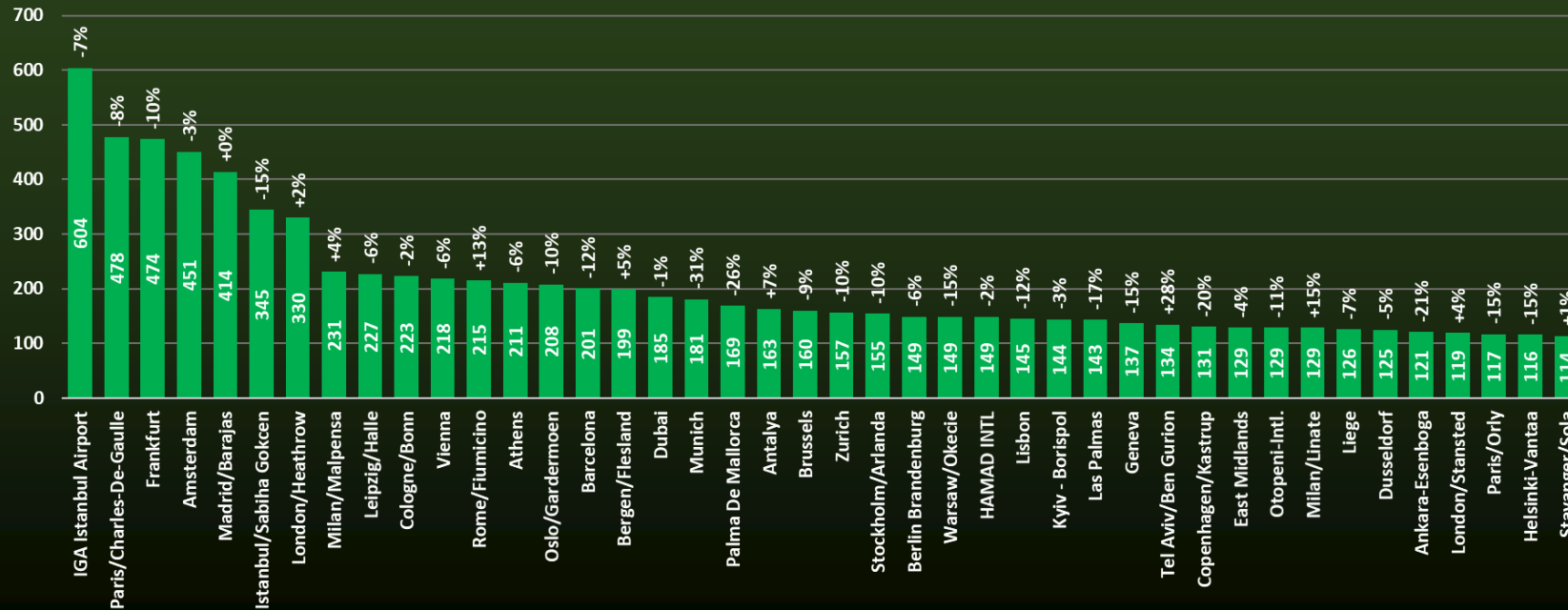
- ✂ 7 of top 10 airports posted decreases over 2 weeks, back to pre-Easter break traffic levels.
- ✂ Largest decrease for Istanbul/Sabiha Gokcen (-15%) due to decrease of domestic traffic in Turkey. The same reason explains decrease at Istanbul IGA (-7%).
- ✂ Decreases for Frankfurt (-10%) mainly due to Lufthansa, TUI and Condor and on flows from/to Spain, France and Italy.
- ✂ Highest increase for Milan (+4%) mainly due to Alitalia and domestic flows.

# Airports (Daily Departure/Arrival flights)

## Latest operations

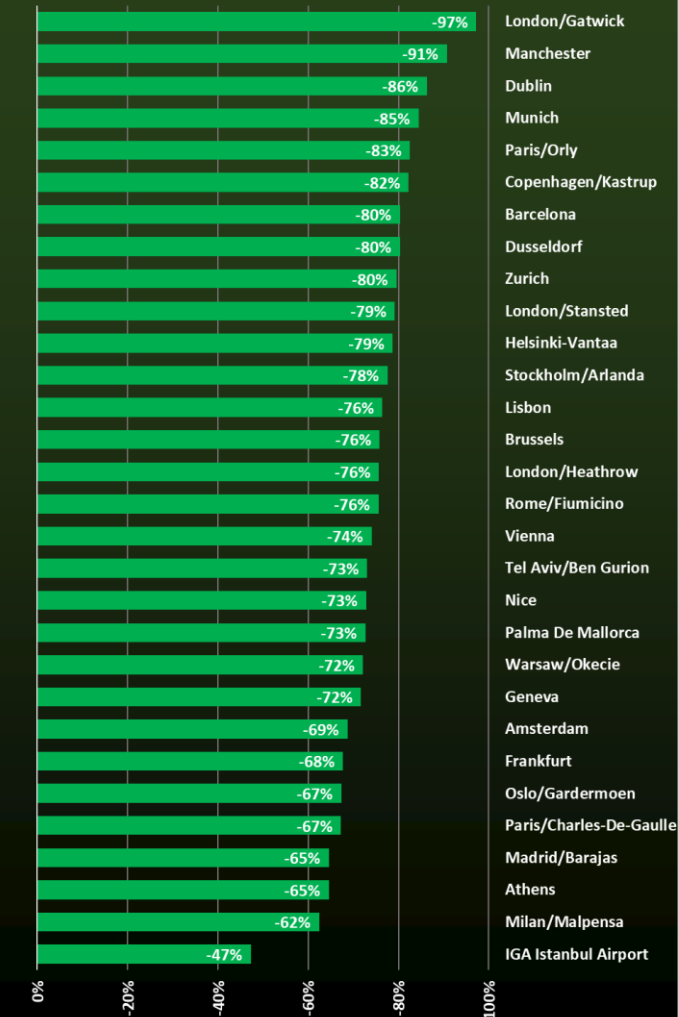


**Top 40 Airports (Dep/Arr flights)**  
Traffic on Wed 14-04-2021 and evolution compared to Wed 31-03-2021



- ✗ Largest decreases for **Munich, Sabiha, Palma, Frankfurt, IGA Istanbul** and **CDG**.
- ✗ Largest increase for **Tel Aviv** over 2 weeks (+28%) (El Al, domestic flows), **Rome** (+13%) and **Milan** (+4%) mainly from Alitalia and Ryanair.
- ✗ Traffic levels ranging from -97% (Gatwick) to -47% (Istanbul IGA) compared to 2019.

**Airports in EUROCONTROL Network**  
(compared with equivalent days in 2019)  
Daily Variation (IFR Dep/Arr Flights) - Wed 14 Apr 2021







- ✂ **Aena** reports March passenger numbers for its airport network down 61% year-on-year to 3.2 million; March 2020 was 59% down on 2019.
- ✂ **Ankara Airport** March 2021 passenger numbers down 23.7% on March 2020 (domestic - 21.6%, international -38.8%); March 2020 was 53.6% (52.6%/59.6%) down on 2019.
- ✂ **Avinor** reports March passenger numbers for its airport network down 54% year-on-year (domestic -36%, international -90%); March 2020 was 65% (55%/58%) down on 2019.
- ✂ **London Luton Airport** to host an outdoor cinema in their long term car park.
- ✂ **Rome Fiumicino** and **Ciampino airports** become the first in Europe to achieve level 4+ ACI Carbon Accreditation.
- ✂ **Schiphol Group** reports that **Eindhoven, Rotterdam** and **Groningen airports** plan to test the feasibility, potential and handling of electric flights.
- ✂ **Swedavia** reports March passenger numbers for its airport network down 74% year-on-year (domestic -66%, international -78%); March 2020 was 60% (59%/60%) down on 2019.

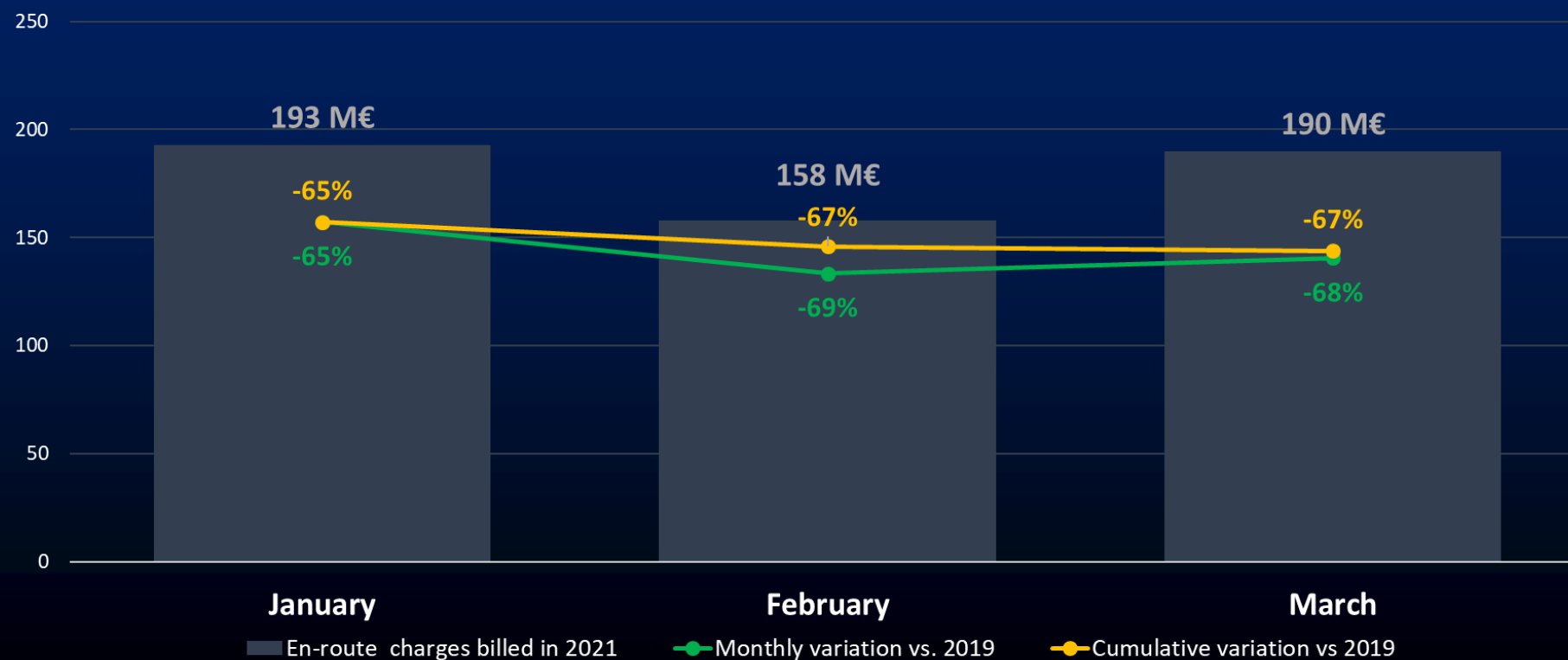
# En-Route Air Navigation charges



## En-route air navigation charges

At EUROCONTROL Network level

Amounts billed + Monthly and Year-to-Date variations (2021 vs 2019)

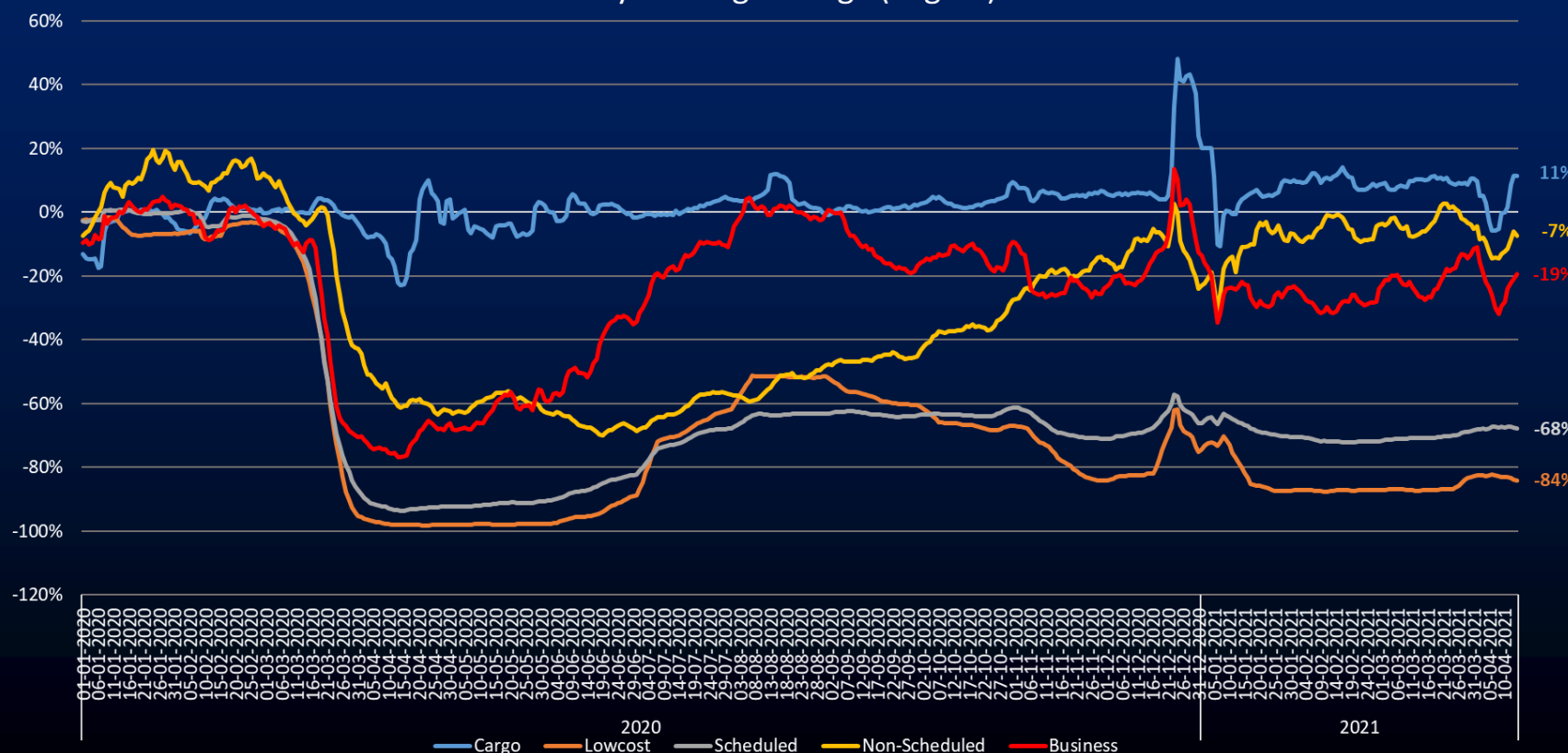


- ✖ **EUROCONTROL** has just billed **190M€** of en-route charges for March flights.
- ✖ This is **-68%** below the amount billed for the March 2019 flights.
- ✖ On a year-to-date basis, we are at **-67% vs 2019**

# Market Segments



Market segments in EUROCONTROL Network  
(compared with equivalent days in 2019)  
7-day moving average (Flights)



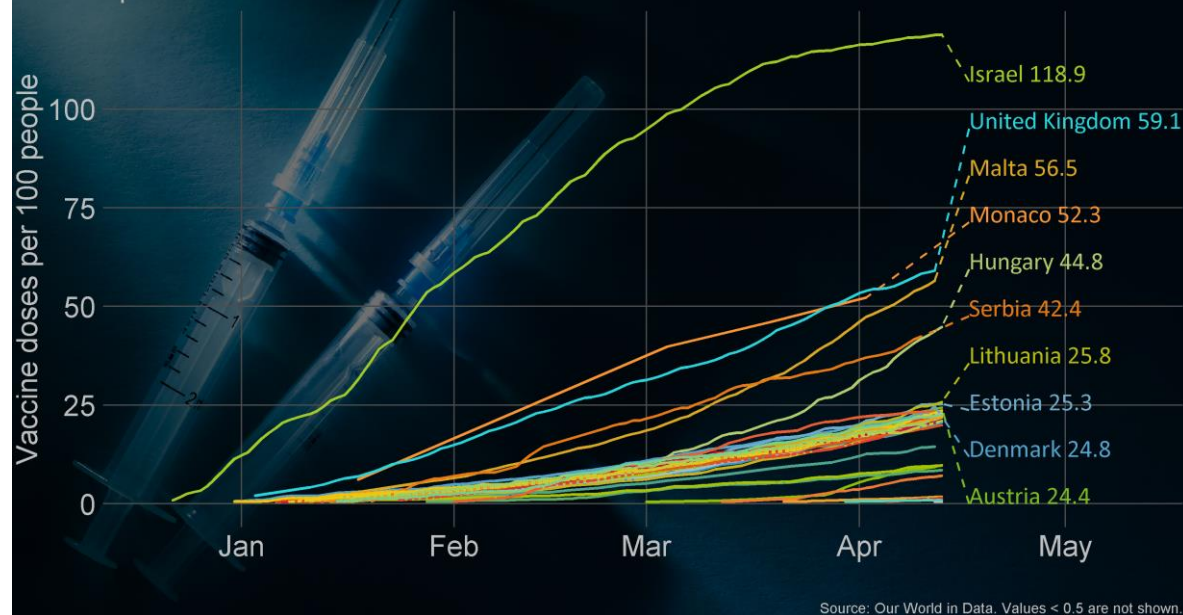
The evolution of the segments is now almost getting back to pre-Easter trends. On 14 April 2021, compared to 2019:

- ✗ **All-cargo** is the only segment increasing with **+11%**.
- ✗ **Charter** decreased to **-7%**.
- ✗ **Business Aviation** decreased to **-19%**.
- ✗ **Traditional** remained very stable, declining by **-67%**.
- ✗ After a minor blip over Easter, **Low-Cost** remains the most affected segment decreasing by **-84%** vs 2019.

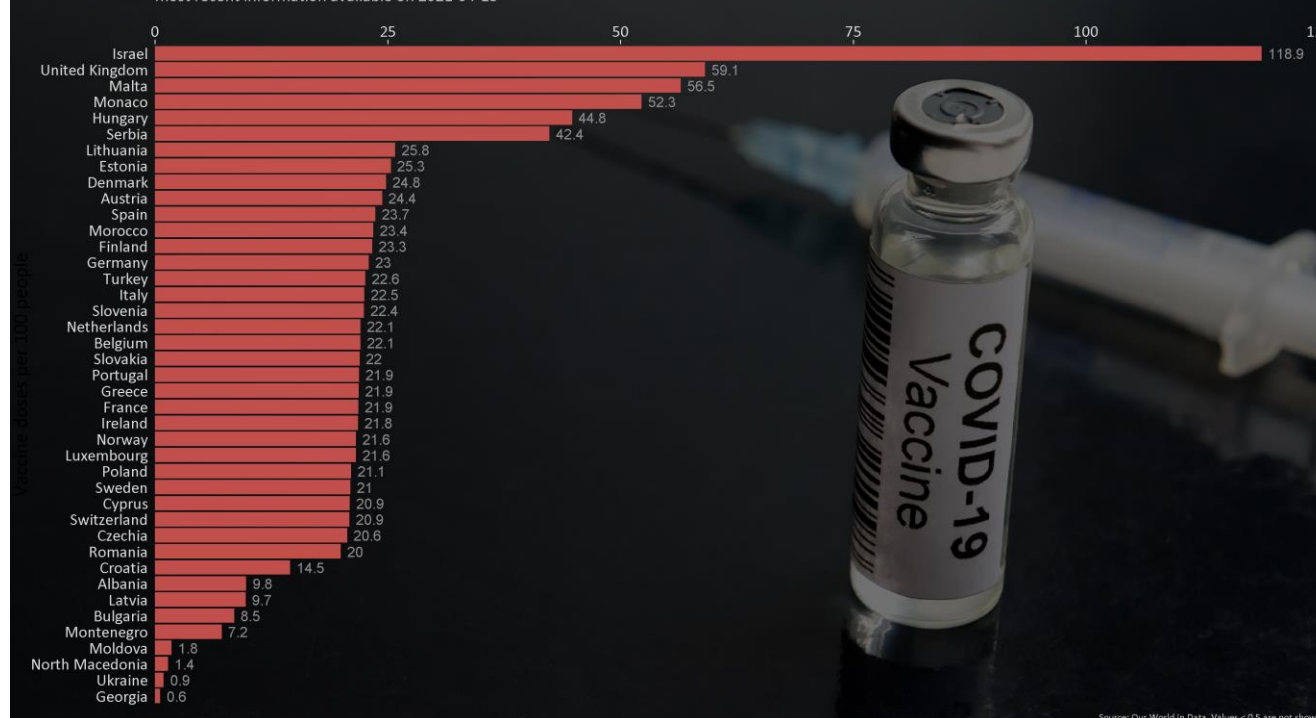
# Vaccination updates



COVID-19 vaccine doses administered in Europe up to 2021-04-13



Vaccine doses per 100 people  
most recent information available on 2021-04-13



- ✗ 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 hand-side graph.
- ✗ On the right hand-side one: Estonia and Lithuania joined the 6 States where it is reported that more than 25 doses per hundred people have been administered by 13 April 2021.

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



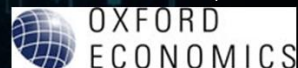
# Economics



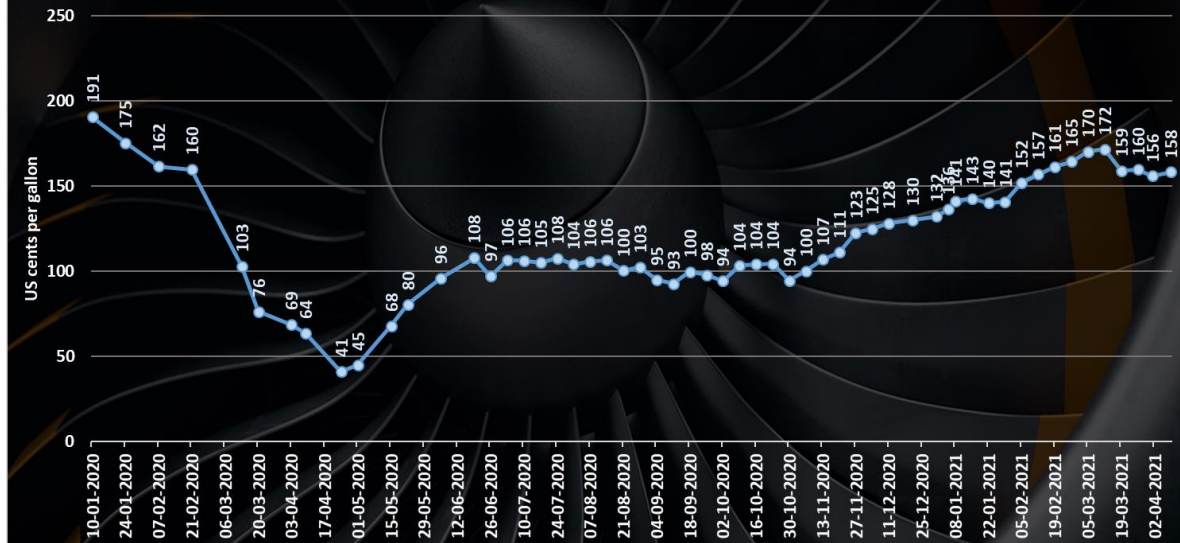
✂ **GDP (Oxford Economics):** slight downward revision for Q2 2021 (from +1.5% in February 2021 to +1% in April 2021 in the base scenario). Strongest rate of this year is expected in Q3.

✂ At an annual level, 2021 is likely to record 4% growth in the base scenario, then 4.7% in 2022.

**GDP change in the European Union (EU27)**  
Baseline scenario, constant prices and exchange rate (€)



**Jet Fuel Price Europe**



Source: IATA/Platts

✂ **Jet fuel prices** remained stable since the beginning of March around 160 cts/gal and recorded **158 cts/gal** on 7 April 2021.

✂ Current prices are comparable to year-ago levels, just before the COVID-19 outbreak start.



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>

- 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](mailto:aviation.intelligence@eurocontrol.int)



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