

22 April 2021



COVID 19 IMPACT ON EUROPEAN AVIATION

EUROCONTROL
Comprehensive Assessment



SUPPORTING EUROPEAN AVIATION



NETWORK
MANAGER



Headlines

- 10,895 flights (35% of 2019 levels) on Wed 21 April 2021, stable (-1%) over 2 weeks.
- Some big States decreased over 2 weeks: Turkey (-17%), Spain -10%) and Italy (-9%). However Germany increased the most (+13%) due to domestic traffic and light aircraft.
- Highest decreases for Turkish Airlines (-13%), Ryanair (-36%), Pegasus (-23%), Air France (-12%) and Lufthansa (-15%). Increase for SAS (+32%). Impact of domestic traffic predominant.
- Highest decreases for Southern airports: Turkish airports and Palma de Mallorca (-31%)
- Domestic traffic vs 2019: Europe (-67%), US (-30%), China (+10%), Middle-East (-45%).



Traffic Situation

Daily flights (including overflights)

Traffic over the last 7 days is

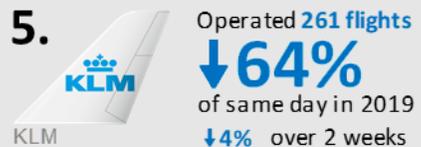
↓64%

Compared to equivalent days in 2019

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

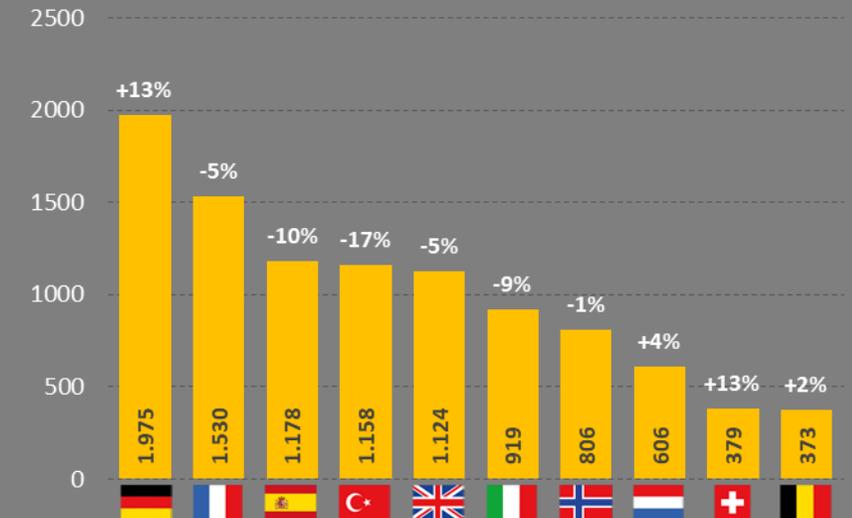
Top 10 Aircraft Operators

on Wed 21 April 2021 (daily flights)



Top 10 Busiest States

on Wed 21 April 2021
(Dep/Arr flights and variation over 2 weeks)



Top 10 Busiest Airports

7-day average Dep/Arr flights on 15-21 April, compared to 2019

Top 10 Airports	Average flights per day (week 15-21/4)	Average flights per day (week 15-21/4) vs 2019
IGA Istanbul Airport	567	-52%
Frankfurt	508	-63%
Amsterdam	471	-67%
Paris/Charles-De-Gaulle	470	-67%
Madrid/Barajas	400	-66%
Istanbul/Sabiha Gokcen	358	-42%
London/Heathrow	343	-74%
Athens	223	-63%
Barcelona	213	-79%
Oslo/Gardermoen	212	-65%

Traffic Flow

On 21 April, the **intra-European** traffic flow was

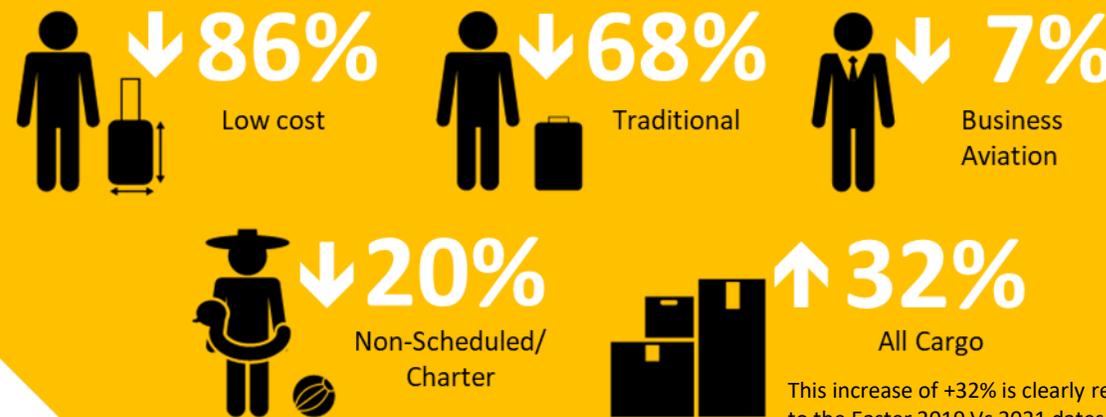
8,160
flights

+1%
over past 2 weeks

-67%
compared to 2019

Market Segments

On 21 Apr, compared to 2019



Economics

(16 April 2021)

Fuel price

↑ 167
Cents/gallon
compared to 158 cents/gallon
on 09 Apr 2021

Source: IATA/Platts

Passengers

(8 April 2021)

1.17 million pax

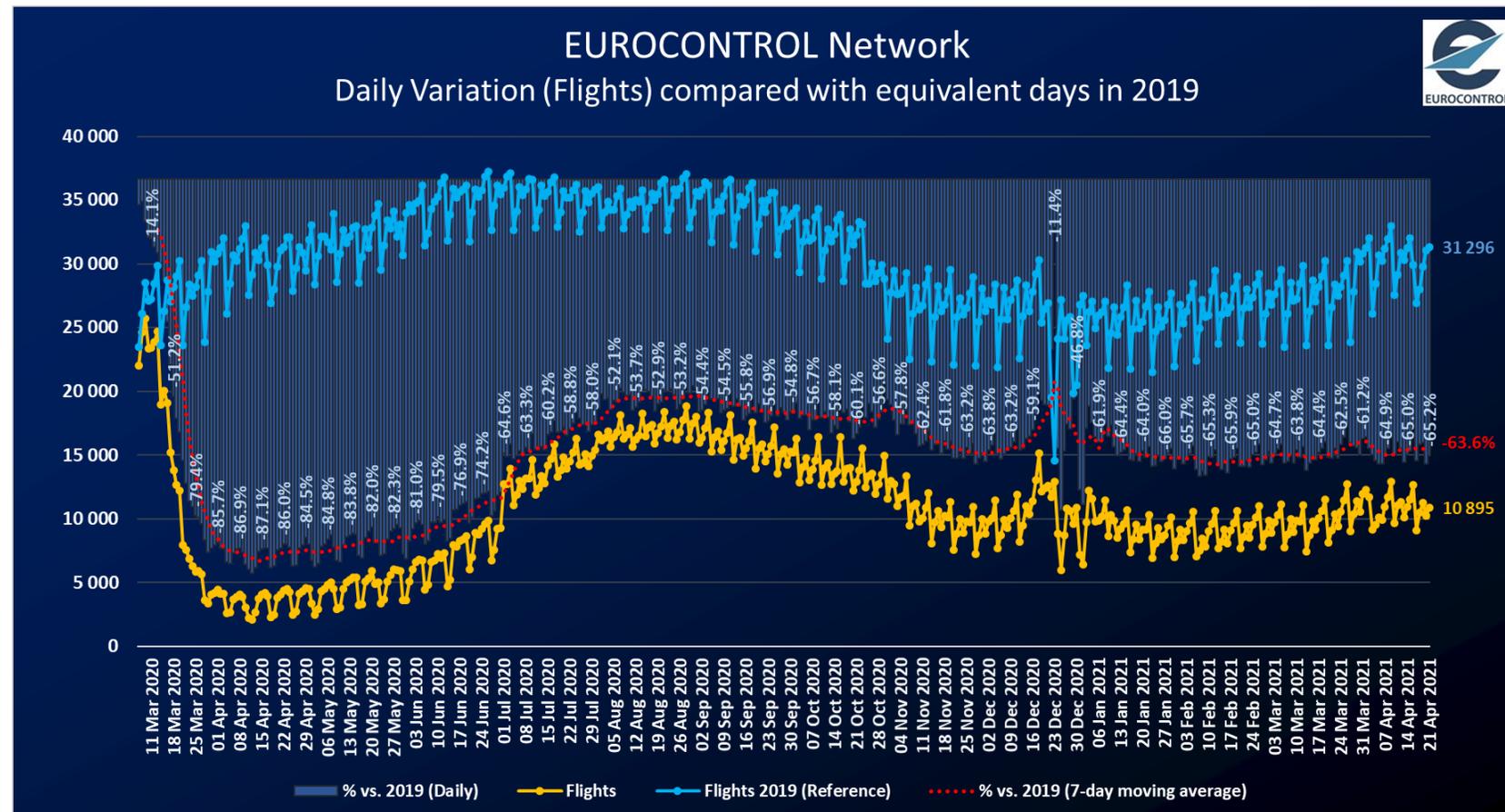
-5.5 million
Vs. 2019
(-83%)

Source: ACI. To be noted: Recovery forecasts just downgraded by ACI

Overall traffic situation at network level



- ✘ **10,895 flights** on Wednesday 21 April.
- ✘ **Stable (-1%)** with **-62 flights** over 2 weeks (from Wed 7 April).
- ✘ **Stable (-0%)** with **-50 flights** over 1 week (from Wed 14 April).
- ✘ **35%** of 2019 traffic levels.



Current situation and scenarios



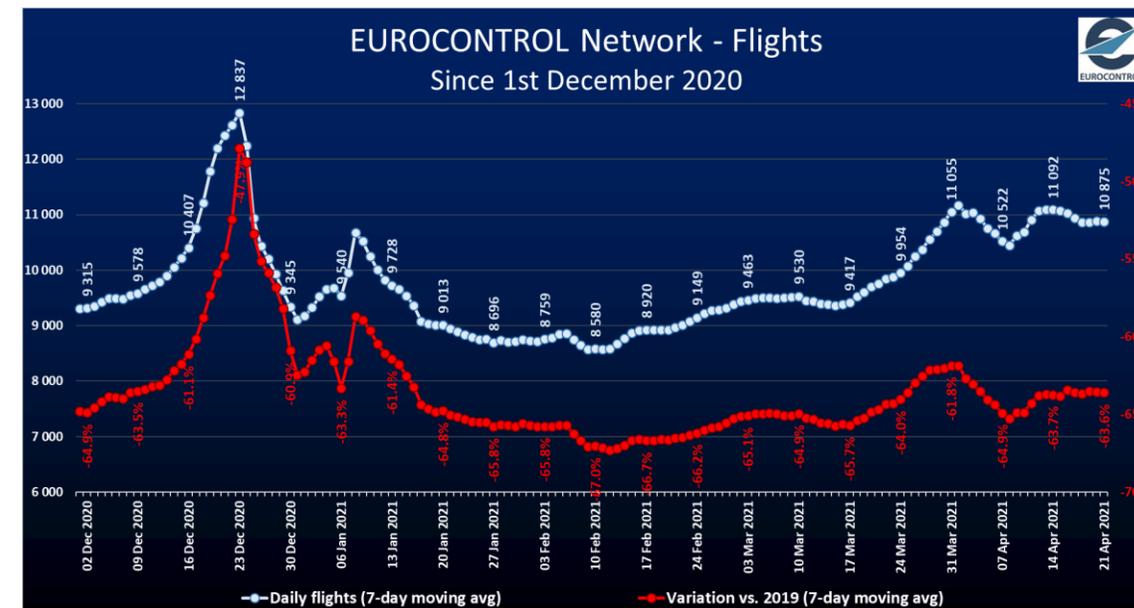
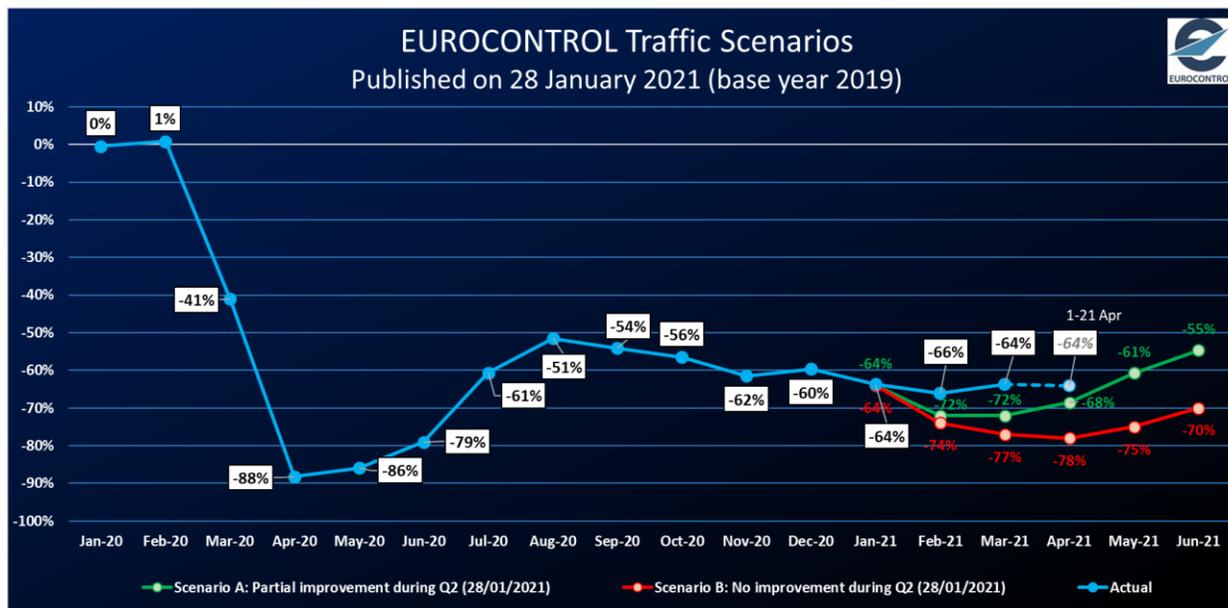
✘ **Traffic at -64% on 1-21 April 2021 vs 1-21 April 2019**, slightly above the latest EUROCONTROL traffic scenarios published on 28 January 2021 mainly due to:

- 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 around mid April (around Easter), **the traffic is now stable over the recent days.**

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



Aircraft operators (Daily flights)

Top 10



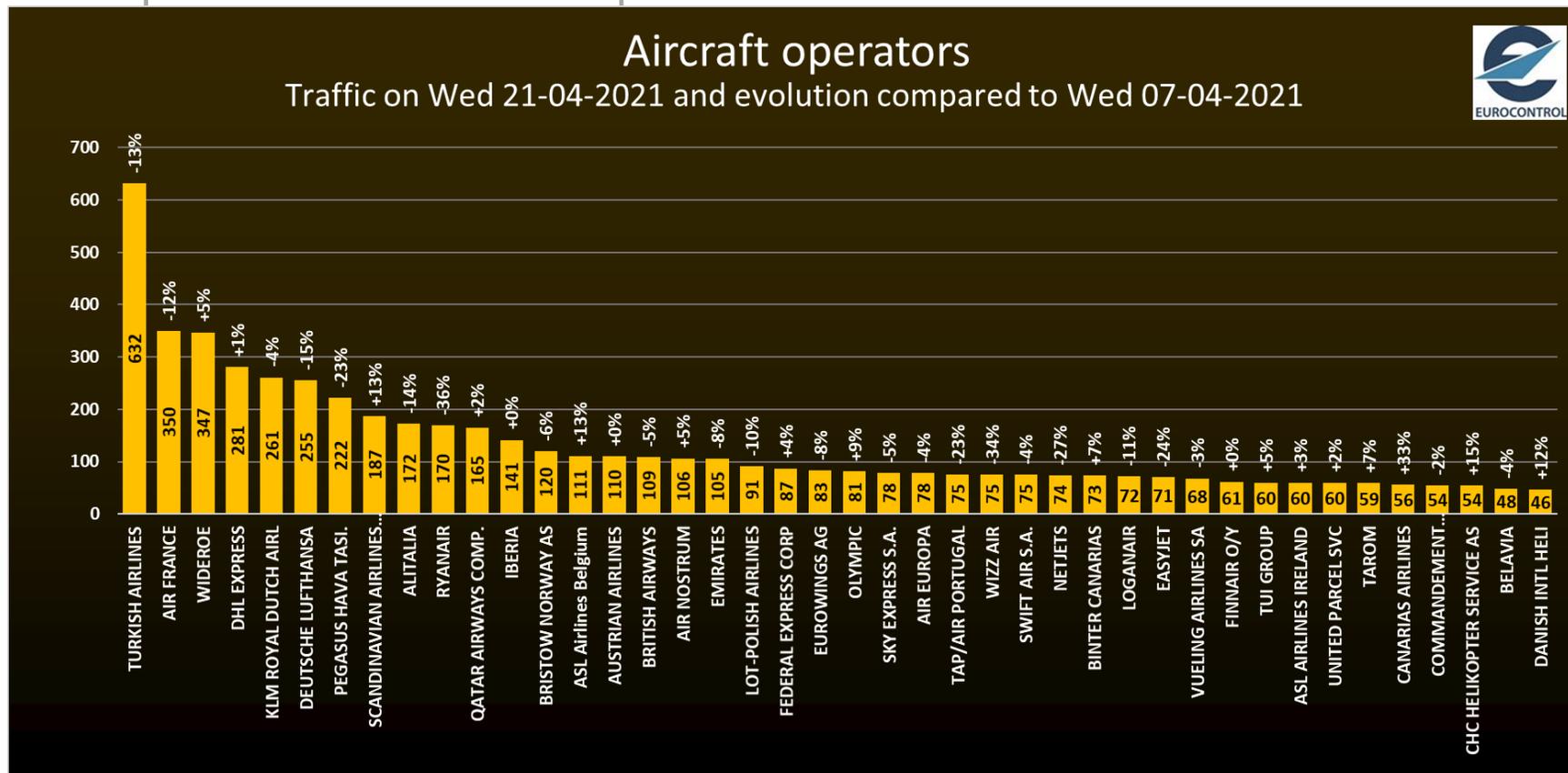
Top 10 Aircraft Operators on Wed 21-04-2021

Rank evolution over 2 weeks	Aircraft Operator	Flights	Δ over 2 weeks	% over 2 weeks	% vs 2019
→	TURKISH AIRLINES	632	↓ -97	-13%	↓ -53%
→	AIR FRANCE	350	↓ -48	-12%	↓ -70%
→	WIDEROE	347	↑ +18	+5%	↓ -13%
↑	DHL EXPRESS	281	↑ +2	+1%	↑ +10%
↑	KLM ROYAL DUTCH AIRL	261	↓ -10	-4%	↓ -64%
↓	DEUTSCHE LUFTHANSA	255	↓ -45	-15%	↓ -83%
↓	PEGASUS HAVA TASI.	222	↓ -67	-23%	↓ -49%
↑	SCANDINAVIAN AIRLINES SYSTEM	187	↑ +21	+13%	↓ -81%
→	ALITALIA	172	↓ -27	-14%	↓ -69%
↓	RYANAIR	170	↓ -95	-36%	↓ -93%

- ✈ **Turkish Airlines** is the busiest airlines despite the highest decrease over 2 weeks (-13%), mainly due to domestic traffic and flows from/to Russia.
- ✈ Positive change in the ranking over 2 weeks for **DHL Express**, **KLM** and **SAS**.
- ✈ Highest decreases for **Turkish Airlines** (-13%), **Ryanair** (-36%) (Domestic Italy), **Pegasus** (-23%)(Domestic Turkey and Turkey-Germany), **Air France** (-12%) (Domestic) and **Lufthansa** (-15%) (flows with Spain).
- ✈ Highest increase for **SAS** (+13%) driven by domestic flows in Sweden, Denmark and Norway.

Aircraft operators (Daily flights)

Top 40 – Latest operations



- ✘ Highest decreases for Turkish Airlines, Ryanair, Pegasus, Air France, Lufthansa and Wizz Air.
- ✘ Ryanair 10th, British Airways 16th, Wizz Air 26th and easyJet 31st.
- ✘ Traffic levels ranging from -99% (Brussels Airl.) to -13% (Wideroe) compared to 2019.



Aircraft operators

Latest news

European airlines

- ✘ **Air France** CEO states that it may raise more capital this year.
- ✘ **British Airways** CEO states that there is an immediate opportunity in terms of the UK/US opening up as a result of their vaccination programmes.
- ✘ **Eurowings** CEO states that the airline will become more pan-European and is in discussions to expand into new bases in the Nordics, Eastern Europe and South Eastern Europe; aims to deploy up to 80 aircraft this summer.
- ✘ **KLM** CFO notes that fleet renewal is a main method of reducing emissions; SAF is still low volume and thus the price is 'extremely high'.
- ✘ **Norwegian** planning a short haul base at Copenhagen, following the closure of its long haul base there.
- ✘ **Ryanair** to appeal EU court rulings on Finnair and SAS state aid.
- ✘ **TAP Air Portugal** resumes services to London Heathrow and to Brazil.
- ✘ **Turkish Airlines** resumes service with the 737 MAX but cancels 10 out its order for 75 737MAX aircraft; another 40 will be converted into options.



- ✘ **Wizz Air** begins services from Kutaisi (in Georgia) to Vilnius and Warsaw; expects to report a net loss of €570-590 million for the year to end March. Expects 'only a gradual recovery into late summer 2021 following what is expected to be a period of good progress of national vaccination plans across key markets'

Worldwide airlines

- ✘ **American Airlines** expects to operate more than 90% of its domestic seat capacity this summer, compared to 2019.
- ✘ **China Airlines** to retire its 747Fs once cargo demand decreases and new 777Fs are delivered.
- ✘ **Delta Airlines** has vaccinated more than 44% of employees and has administered more than 130,000 tests to employees in Q1 2021; reports operating loss of \$1.4 billion in Q1 2021 and net loss of \$1.2 billion.
- ✘ **Qantas Group** expects to exceed 90% of its pre-coronavirus domestic capacity for Q2 2021; preparing for international travel resumption in October.
- ✘ **United Airlines** prices \$4 billion of secured notes at 4.4%/4.6%; reports operating and net loss of \$1.4 billion for Q1 2021.

States (Daily Departure/Arrival flights)

Top 10



Top 10 States on Wed 21-04-2021

Rank evolution over 2 weeks	State	Flights (Dep/Arr)	Δ over 2 weeks	% over 2 weeks	% vs 2019
→	Germany	1975	↗ +226	+13%	↘ -66%
→	France	1530	↘ -82	-5%	↘ -66%
↗	Spain	1178	↘ -134	-10%	↘ -74%
↘	Turkey	1158	↘ -244	-17%	↘ -57%
→	United Kingdom	1124	↘ -55	-5%	↘ -81%
→	Italy	919	↘ -94	-9%	↘ -75%
→	Norway	806	↘ -9	-1%	↘ -52%
→	Netherlands	606	↗ +23	+4%	↘ -66%
↗	Switzerland	379	↗ +43	+13%	↘ -71%
↘	Belgium	373	↗ +7	+2%	↘ -63%

✘ After Easter, some big States recorded decreases over 2 weeks:

- **Turkey** (-17%) (Turkish Airlines, Pegasus, Sun Express; Domestic, flows with Russia and Germany).
- **Spain** (-10%) (flows with Germany, Spain and Italy).
- **Italy** (-9%) (Ryanair, Alitalia; Domestic).
- **France** (-5%) (Air France, light aircraft; mainly domestic).
- **UK** (-5%) (many flows notably with Germany, Italy and UK).

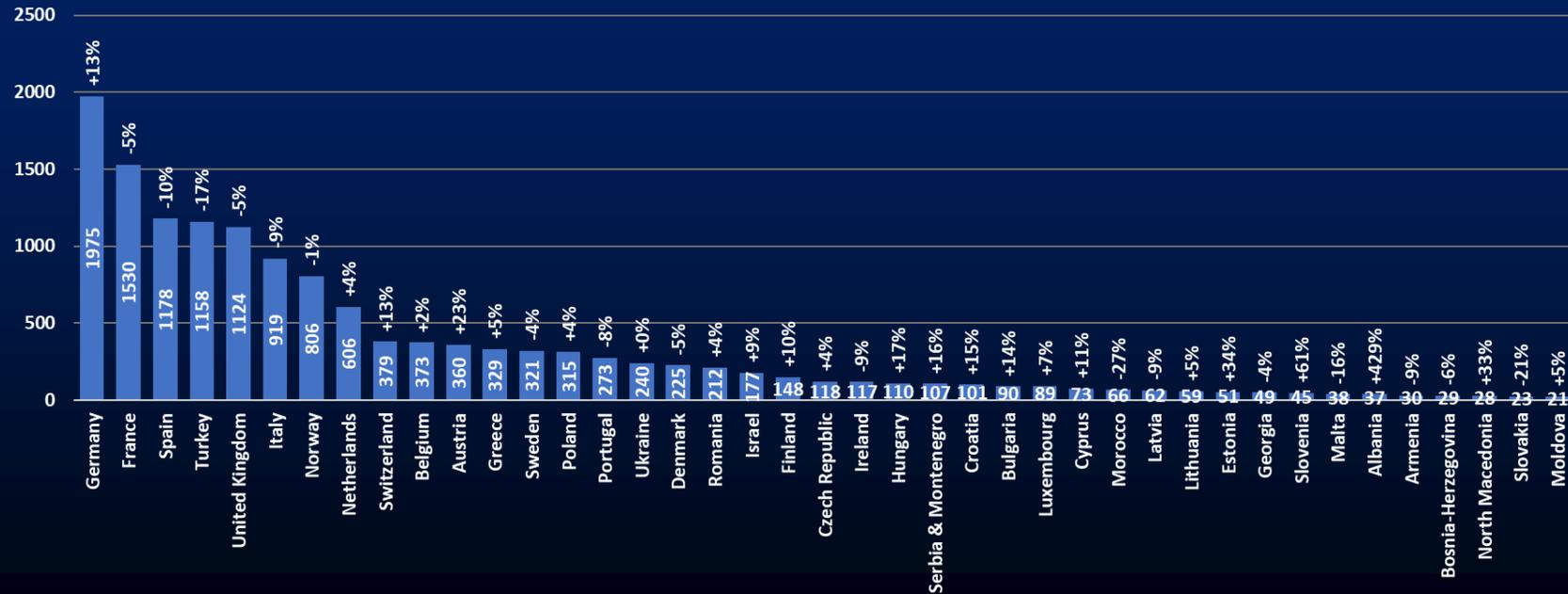
✘ **Highest increase** over 2 weeks for **Germany** (+13%) mainly driven by domestic traffic and light aircraft.

States (Daily Departure/Arrival flights)

Latest traffic situation

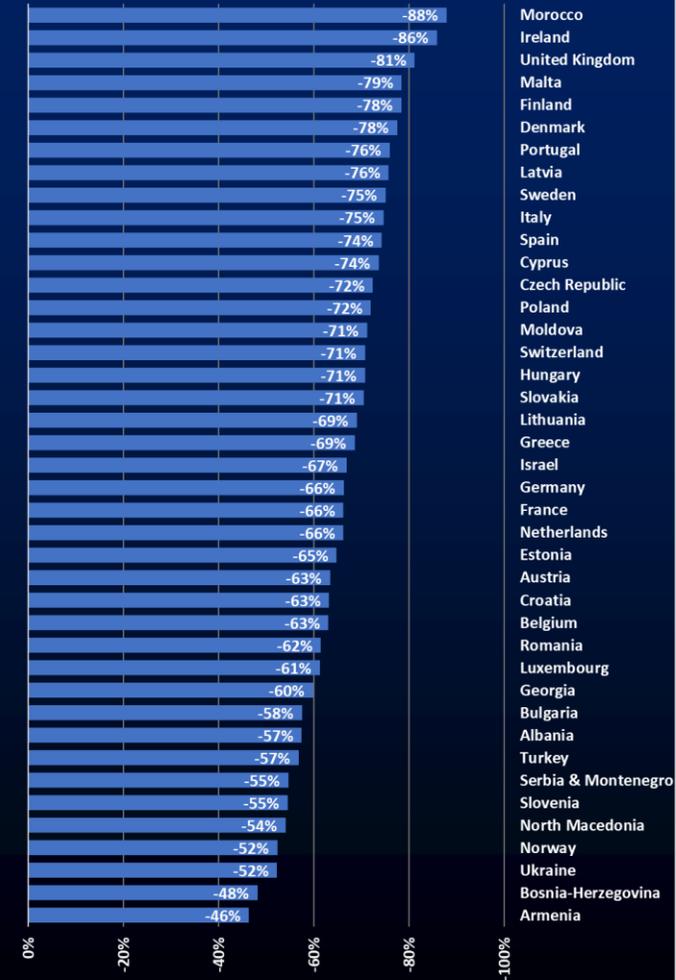


States (Dep/Arr flights)
Traffic on Wed 21-04-2021 and evolution compared to Wed 07-04-2021



- ✘ Highest decreases for Turkey (-17% over 2 weeks), Spain (-10%), Italy (-9%), France (-5%) and UK (-5%).
- ✘ Highest increases for Germany (+13%), Austria (+23%) and Switzerland (+13%).
- ✘ Traffic levels ranging from -88% (Morocco) to -46% (Armenia) compared to 2019.

States in EUROCONTROL Network
(compared with equivalent days in 2019)
Daily Variation (IFR Dep/Arr Flights) - Wed 21 Apr 2021



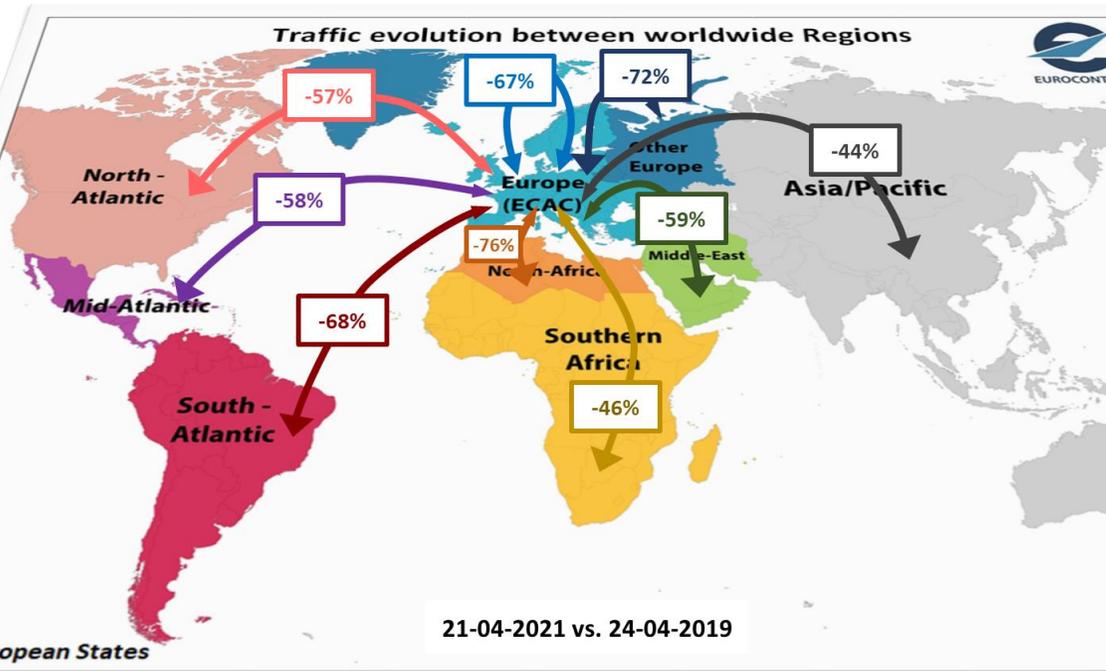


- ✘ **Alaska** offers free vaccines to travelers entering the state via major airports, beginning in June.
- ✘ **CAAC** reports China domestic passenger numbers in March were above 2019 level.
- ✘ **Ireland's** Civil Aviation Development Forum publishes an Aviation Restart Plan, with recommendations for government on a traffic light system, exemption from testing/quarantine for fully vaccinated pax and support for the EU Digital Green Pass system.
- ✘ **Morocco** delays the resumption of international flights until the end of Ramadan in mid-May.
- ✘ **New Zealand** allows travelers from Australia to enter without quarantine (already allowed in the other direction).
- ✘ **US** Department of State increases the number of 'Level 4: Do Not Travel' countries to approximately 80% worldwide.

Traffic flows (Daily Departure/Arrival flights)



- ✘ The main traffic flow is the intra-Europe flow with 8,160 flights on Wednesday 21 April, which is increasing (+1%) over 2 weeks.
- ✘ Intra-Europe flights are still 67% below 2019 levels while intercontinental flows are running 61% below.



REGION	07-04-2021	21-04-2021	%	vs. 2019
Intra-Europe	8 078	8 160	+1%	-67%
Europe<->Asia/Pacific	446	440	-1%	-44%
Europe<->Mid-Atlantic	64	71	+11%	-58%
Europe<->Middle-East	575	546	-5%	-59%
Europe<->North Atlantic	458	477	+4%	-57%
Europe<->North-Africa	258	239	-7%	-76%
Europe<->Other Europe	351	272	-23%	-72%
Europe<->South-Atlantic	60	58	-3%	-68%
Europe<->Southern Africa	174	166	-5%	-46%
Non Intra-Europe	2 386	2 269	-5%	-61%

Country pairs (Daily Departure/Arrival flights)

Top 10



Top 10 Country-Pair on Wed 21-04-2021

Rank evolution over 2 weeks	Country-Pair	Dep/Arr Flights	Δ over 2 week	% over 2 week	% vs 2019
→	France <-> France	684	↓ -79	-10%	↓ -44%
→	Norway <-> Norway	666	↑ +4	+1%	↓ -32%
↗	Germany <-> Germany	558	↗ +296	+113%	↓ -46%
↓	Spain <-> Spain	557	↓ -28	-5%	↓ -55%
↓	Turkey <-> Turkey	481	↓ -96	-17%	↓ -48%
↓	Italy <-> Italy	377	↓ -59	-14%	↓ -55%
↓	United Kingdom <-> United Kingdo	355	↓ -6	-2%	↓ -70%
→	Greece <-> Greece	191	↗ +4	+2%	↓ -41%
↗	Sweden <-> Sweden	167	↗ +14	+9%	↓ -61%
↗	France <-> Germany	127	↗ +24	+23%	↓ -66%

- ✘ 9 of the top 10 flows are domestic.
- ✘ Highest **increase** in flights over 2 weeks for domestic flows in **Germany (+113%)** mainly due to small aircraft.
- ✘ Highest **decreases** for domestic flows in:
 - **Turkey (-17%)** mainly due to Turkish Airlines, Pegasus and SunExpress.
 - **France (-10%)** mainly due to light aircraft and Air France.
 - **Italy (-14%)** mainly due to Alitalia and Ryanair.

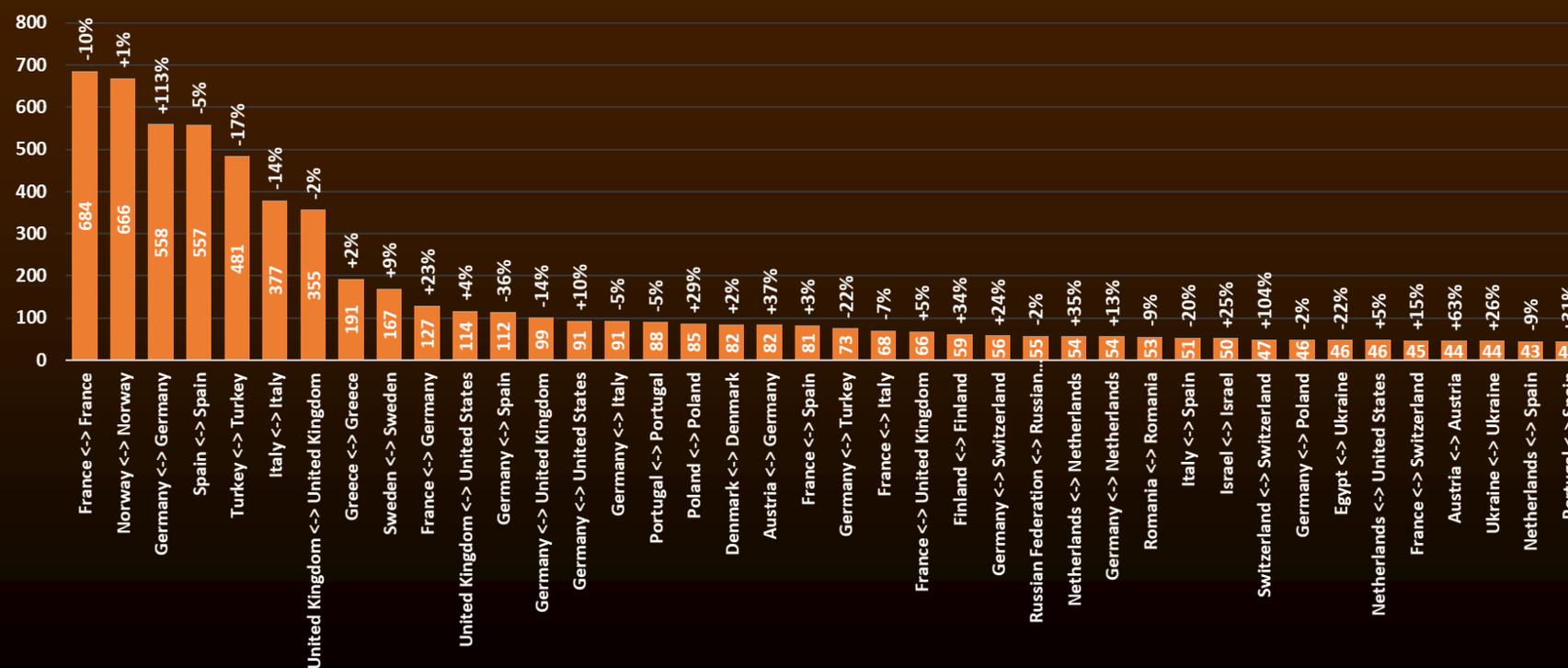
Country pairs (Daily Departure/Arrival flights)

Latest traffic situation



Top 40 Country-Pairs (Dep/Arr flights).

Traffic on Wed 21-04-2021 and evolution compared to Wed 07-04-2021



✖ The busiest non-domestic flows were:

- **France-Germany** (127 flights, +23% over 2 weeks).
- **UK-US** (114, +4%).
- **Germany-Spain** (112, -36%).
- **Germany-UK** (99, -14%).
- **Germany-US** (91, +10%).

✖ High decrease for the flow **Turkey-Russia** (-67%) which leaves the Top 40 Country-Pairs

Outside Europe

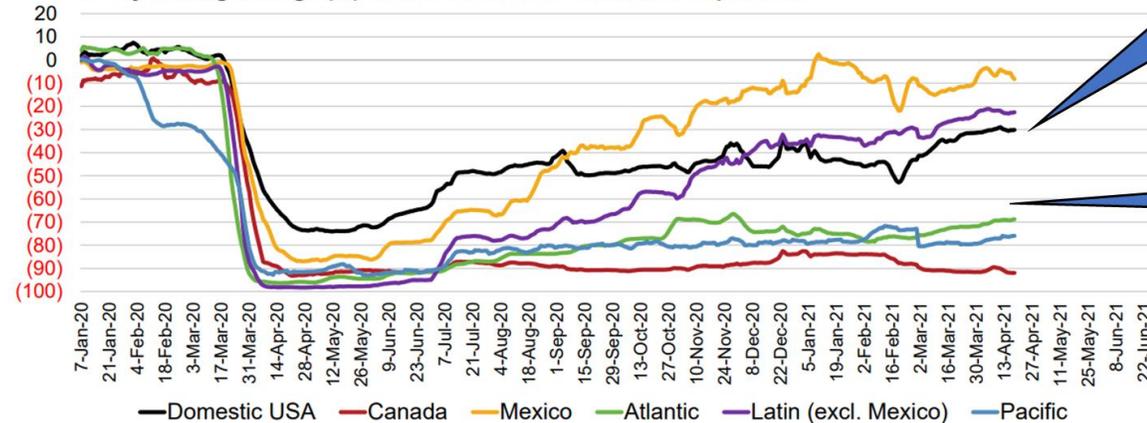


USA

- ✘ Bookings are gradually improving on rising vaccination rates and easing travel restrictions.
 - ✘ US domestic recorded a decline of 30% (vs 2019) and international traffic recorded a decline of 43% (vs 2019) on 20 April.
 - ✘ On 20 April, US airline passenger volumes were 42% below 2019 levels with domestic down 39% and international down 59%.
 - ✘ The domestic US load factor has improved recently, averaging at 73% on most recent week vs 87% 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 31% Below Pre-Pandemic Levels
 Domestic Flights Operated Down 30%, International Flights Operated Down 43%

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



US Domestic flights: **-30%**

Worldwide departures: **-31% below 2019 levels**

US International flights: **-43%**

Source: A4A member passenger airlines and branded code share partners

* "Pre-pandemic" precedes March 1, 2020

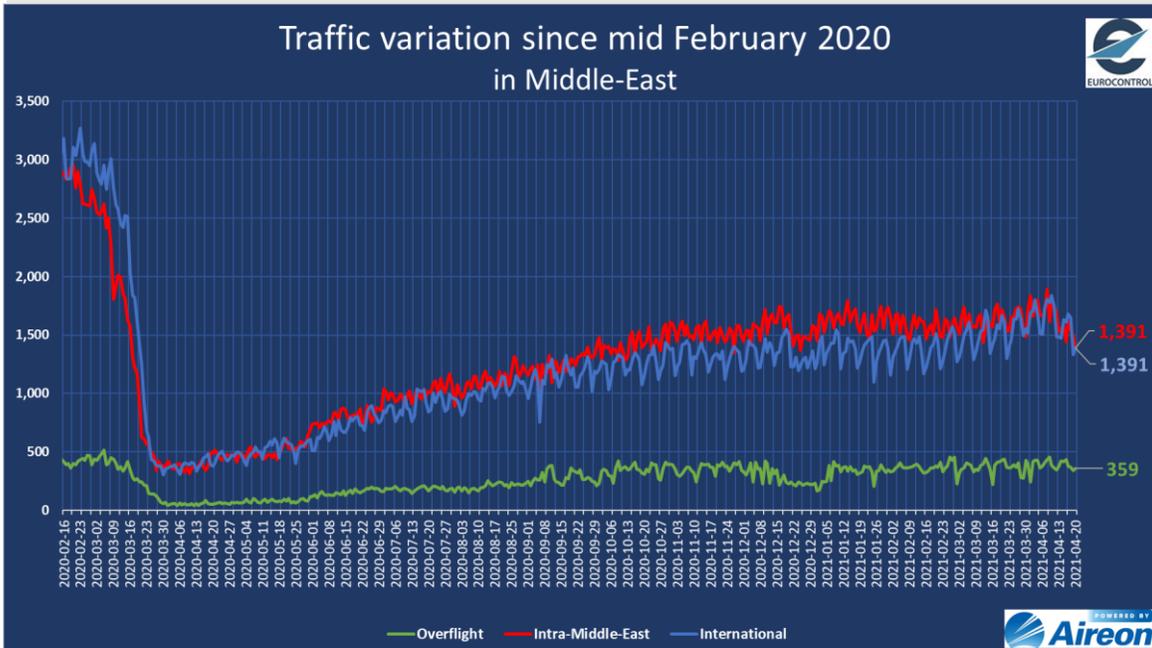


Outside Europe



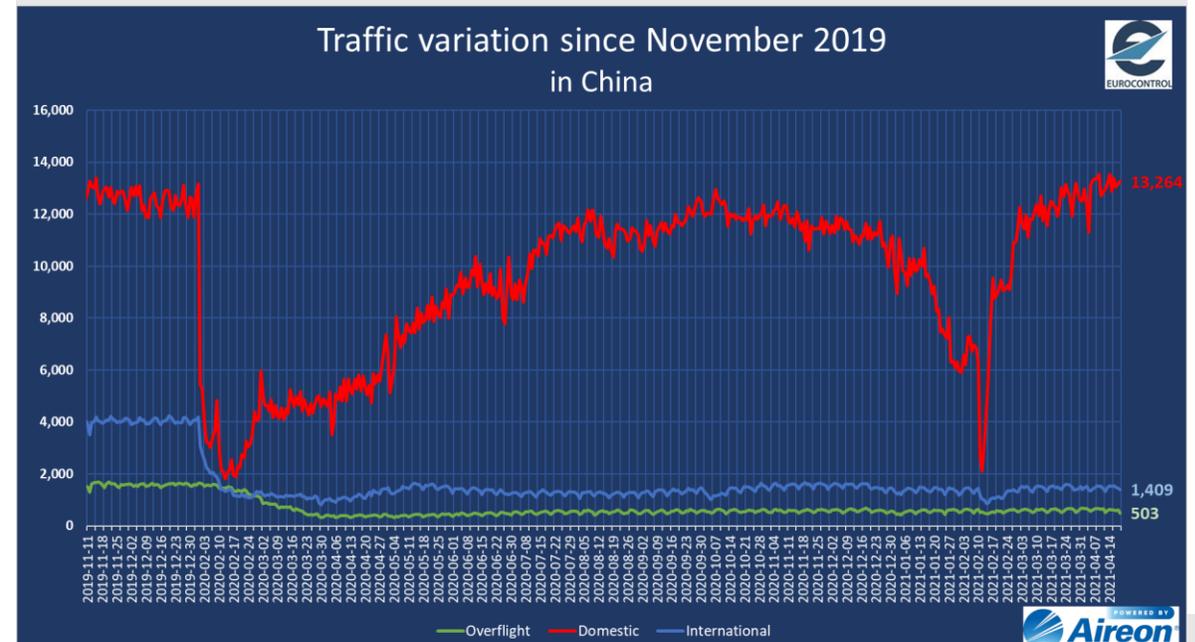
Middle East

- ✘ Intra-Middle-East traffic and international traffic from/to Middle-East recorded each 1,391 daily flights on 20 April (-45% and -46% compared to Feb 2020 respectively).
- ✘ Overflights have remained stable around 359 flights (-14% compared to Feb 2020) over the recent weeks.



China

- ✘ On 17 April, domestic traffic recorded 13,264 flights (+10% compared to January 2020 levels).
- ✘ International flights and overflights are still suppressed, they were stable on previous weeks with 1,409 and 503 flights respectively (-63% and -62% respectively vs 1 Jan 2020).
- ✘ The CAAC reported a passenger load factor of 66.2% in February 2021 vs 50.3% in Feb. 2020 vs 86.1% in Feb. 2019.



Airports (Daily Departure/Arrival flights)

Top 10 and latest news



Rank evolution over 2 weeks	Top 10 Airports on Wed 21-04-2021				
	Airport	Dep/Arr Flights	Δ over 2 weeks	% over 2 weeks	% vs 2019
→	IGA Istanbul Airport	529	↘ -101	-16%	↘ -56%
↗	Amsterdam	468	↘ -16	-3%	↘ -68%
↘	Paris/Charles-De-Gaulle	466	↘ -31	-6%	↘ -68%
→	Frankfurt	440	↘ -37	-8%	↘ -69%
→	Madrid/Barajas	396	↘ -11	-3%	↘ -67%
↗	London/Heathrow	327	↘ -13	-4%	↘ -76%
↘	Istanbul/Sabiha Gokcen	321	↘ -67	-17%	↘ -47%
→	Leipzig/Halle	238	→ +0	+0%	→ +0%
↗	Vienna	235	↗ +19	+9%	↘ -72%
↗	Athens	226	↗ +28	+14%	↘ -63%

✘ 7 of top 10 airports decreased over 2 weeks, back to pre-Easter break traffic levels.

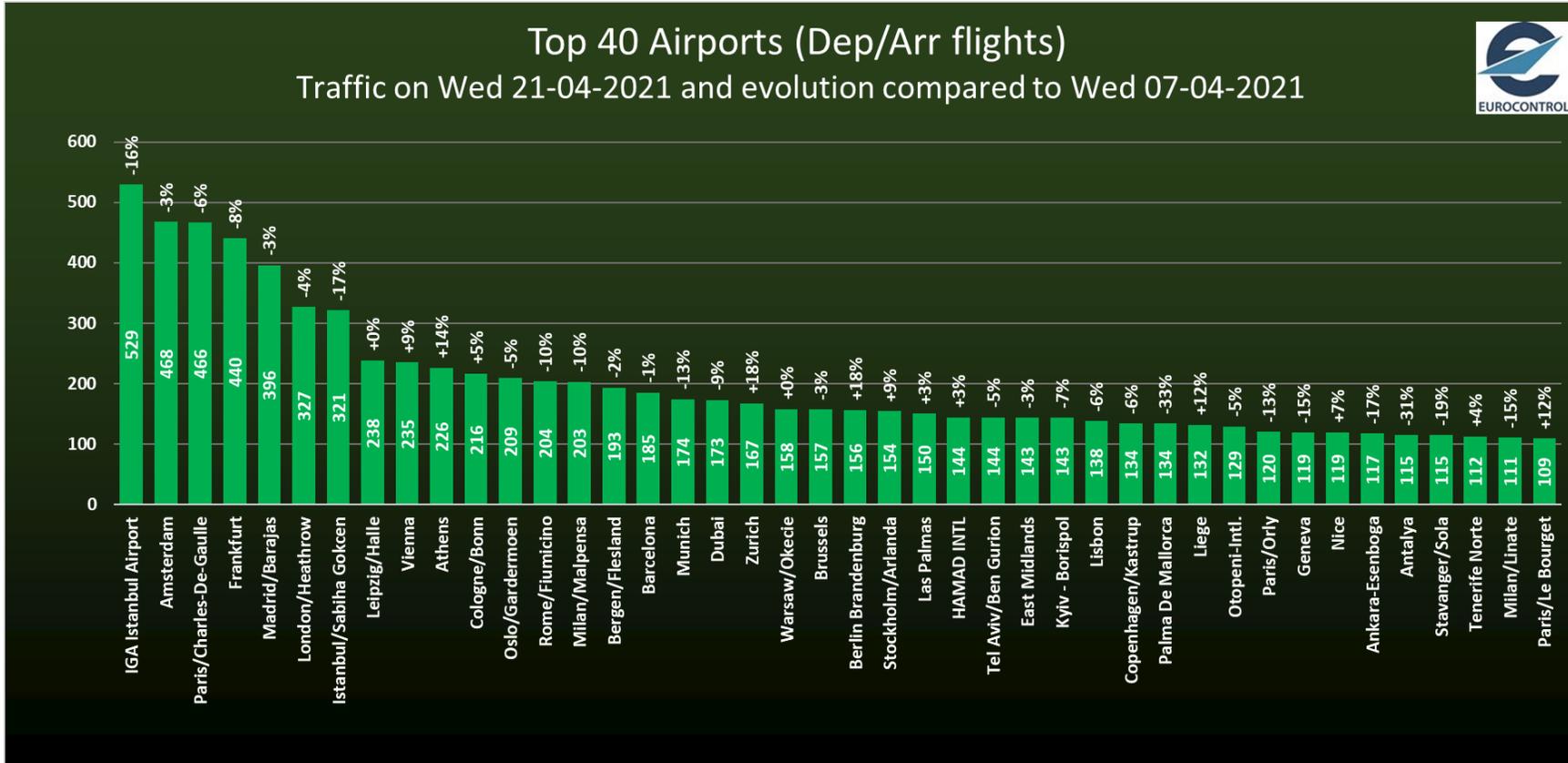
✘ Largest decrease for:

- **IGA Istanbul Airport (-16%)** mainly due to Turkish Airlines as well as domestic flows and flows with Russia.
- **Istanbul/Sabiha (-17%)** mainly due to Pegasus and Turkish Airlines as well as domestic flows and flows with Germany, Russia, Spain, Belgium and France.

✘ Highest increase for Athens (+14%) mainly due to Olympic and many flows to Northern Europe.

Airports (Daily Departure/Arrival flights)

Latest operations



✘ Largest decreases for IGA Istanbul (-16%), Istanbul/Sabiha (-17%), Palma de Mallorca (-33%), Antalya (-31%) and Frankfurt (-8%).

✘ Traffic levels ranging from -987% (Gatwick) to -56% (Istanbul IGA) compared to 2019.



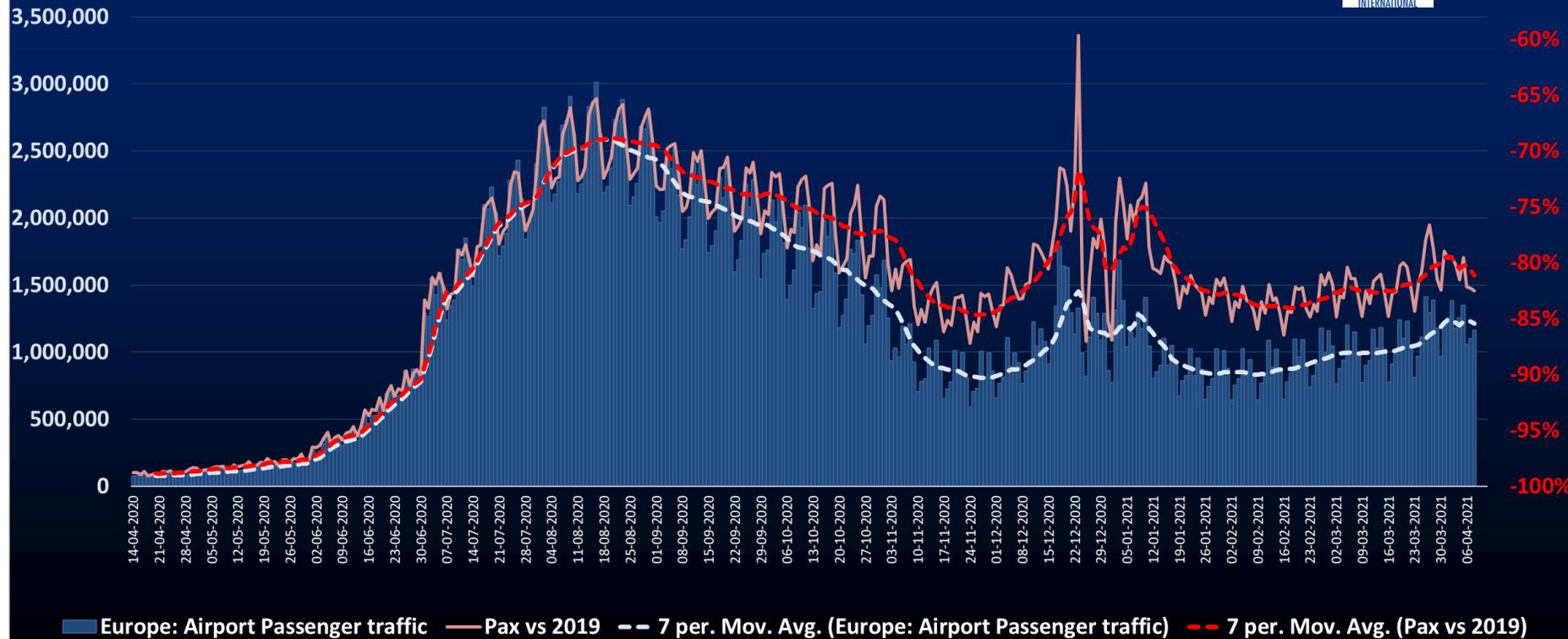


- ✘ **Amsterdam Schiphol Airport** reports March passenger numbers down 73.2% year-on-year to 660,372 (Europe -73.8%, intercontinental -72.5%); in March 2020 the numbers were 56.1% down (-58.4%/-50.4%) on 2019.
- ✘ **Copenhagen Airport** reports March passenger numbers down 82.5% year-on-year to 148,877 (domestic -36.6%, international -85.4%); in March 2020 the numbers were 59% down on 2019.
- ✘ **Cork Airport** reports that DHL Express is establishing a new route from Cork to Leipzig, initially using Boeing 767s leased from Condor; closing its principal runway for 10 weeks this autumn.
- ✘ **Gatwick Airport** to issue £300 million of 2.5% 11 year bonds.
- ✘ **Groupe ADP** reports March passenger numbers for its Paris airport network down 53% year-on-year to 1.3 million (domestic -37%, Europe -66%, other international -70%); in March 2020 the numbers were 64% down on 2019 (-58%/-64%/-53%).
- ✘ **Manchester Airports Group** are negotiating 'proposals to avoid further compulsory redundancies though new temporary pay and working arrangements for the year ahead'.

Passengers



Europe: Airport Passenger Traffic
Comparison with 2019



✘ **ACI** recorded just below 1.17 million passengers on 8 April 2021*, a **loss of 5.5 million passengers** compared to the equivalent day in 2019 (i.e. - **83%**).

✘ In January **2021**, **ACI Europe** reported **passenger traffic fell by 80.3%** at European** airports (domestic: -62.5% and international: -86.2%).

✘ **ACI** has just issued a communication showing a downgrading of recovery forecasts due to “a deepening crisis” as air passenger traffic returns to rock bottom levels.

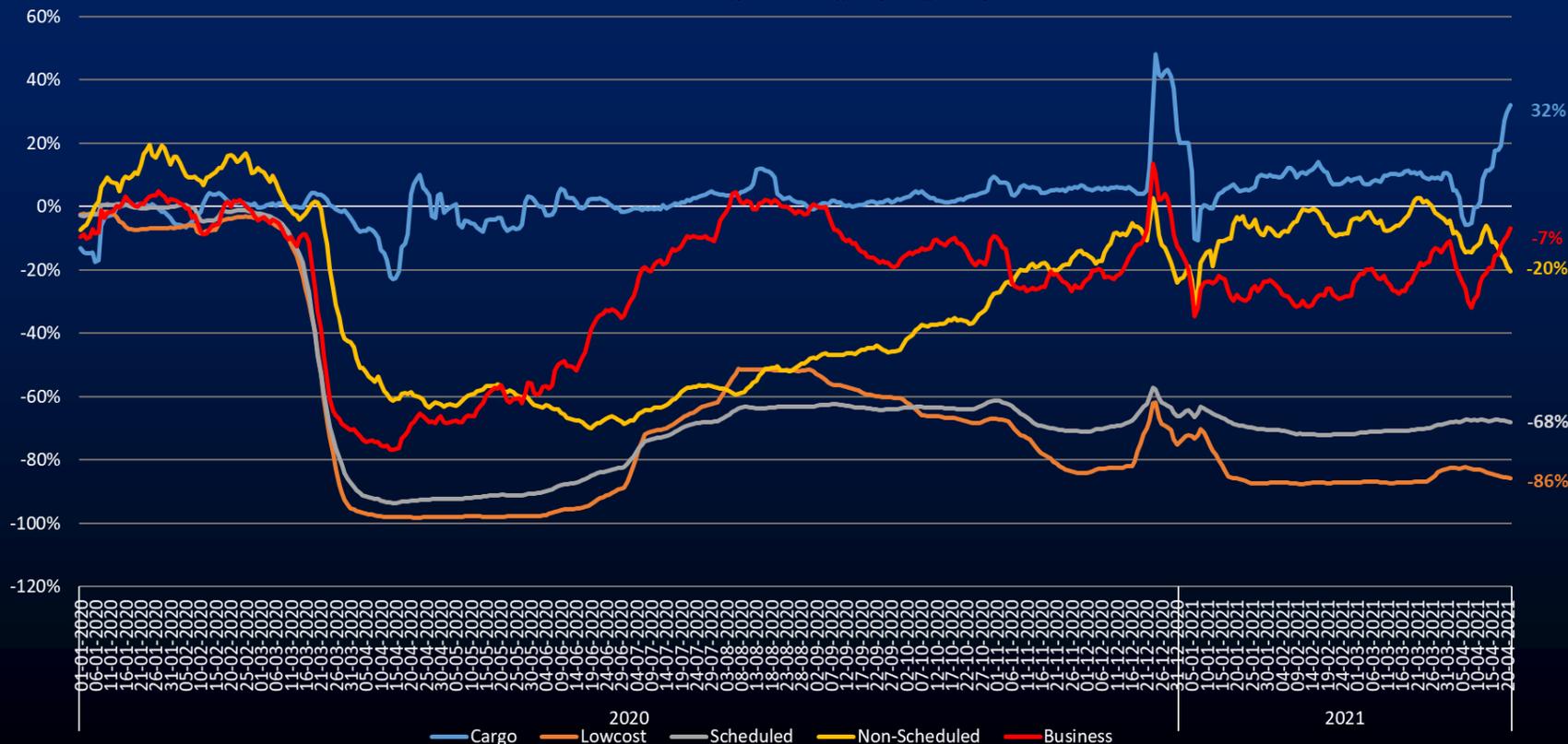
* Latest available data from ACI

**Russia included.

Market Segments



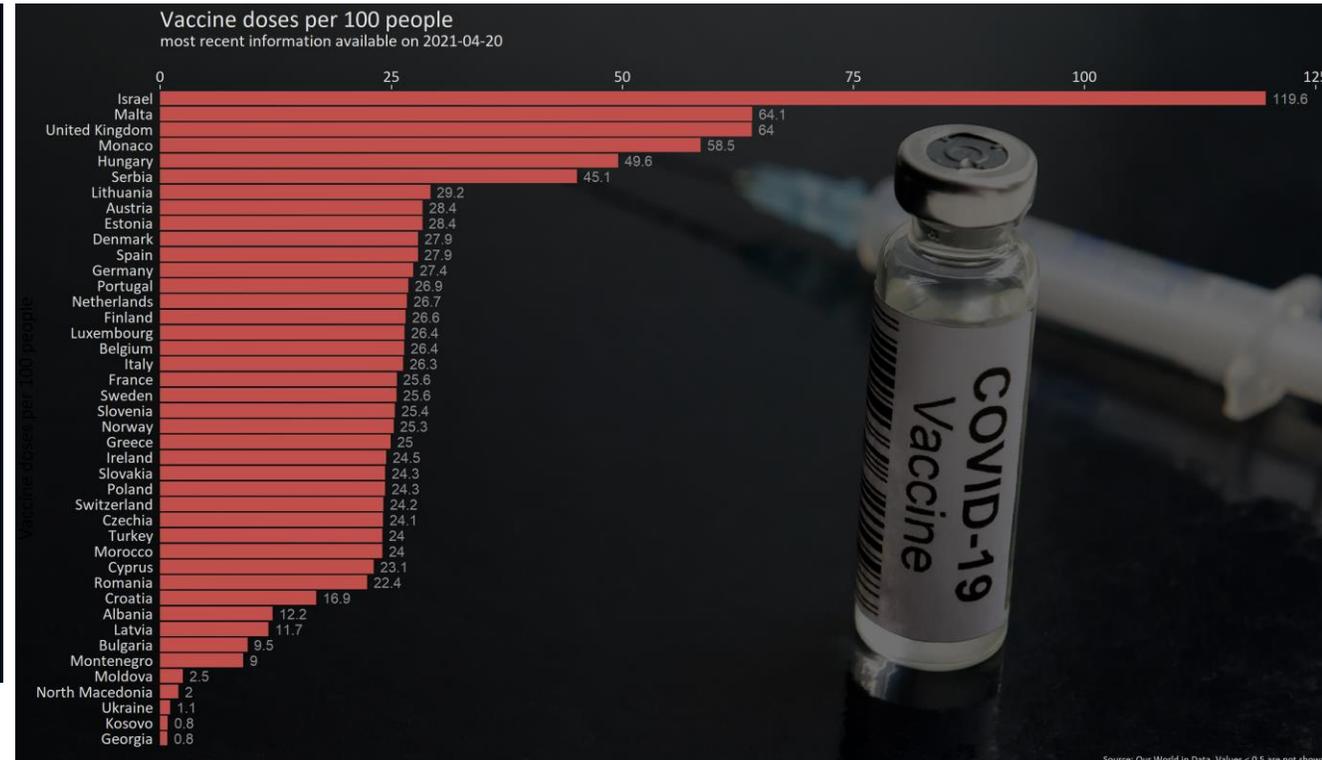
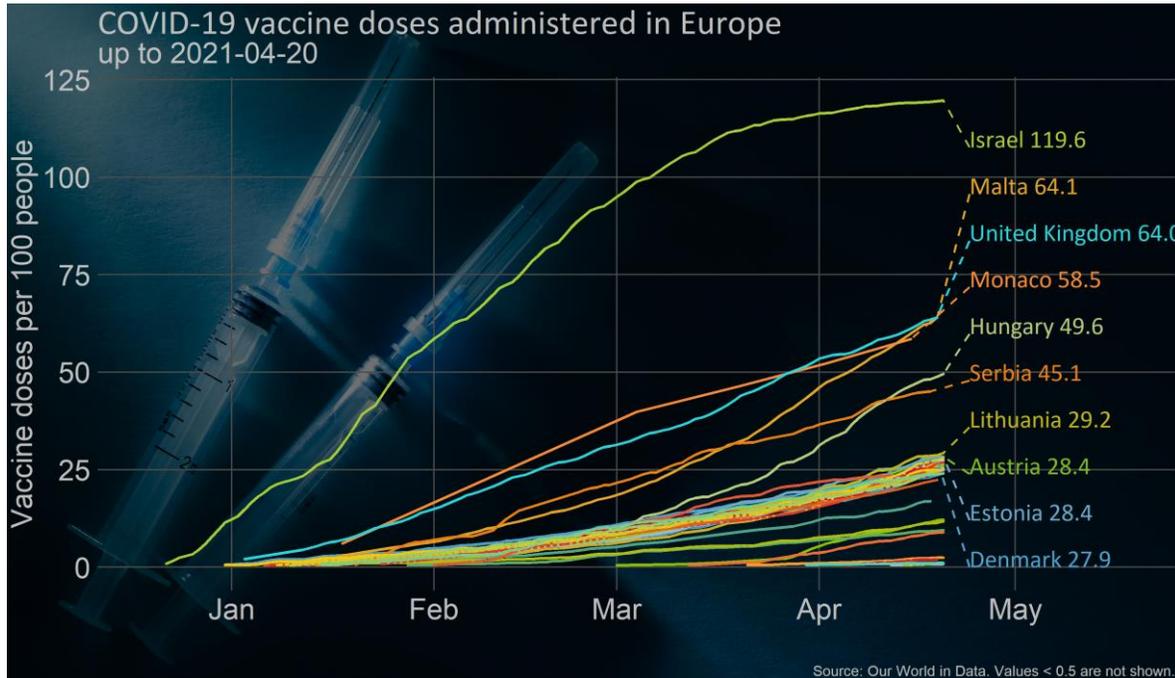
Market segments in EUROCONTROL Network
(compared with equivalent days in 2019)
7-day moving average (Flights)



The evolution of the segments is now almost getting back to pre-Easter trends. On 21 April 2021, compared to 2019:

- ✘ **All-cargo** is the only segment increasing with **+32%**. This huge increase is clearly related to the Easter 2019 vs 2021 dates.
- ✘ **Charter** decreased to **-20%**.
- ✘ **Business Aviation** decreased to **-7%**.
- ✘ **Traditional** remained very stable, declining by **-68%**.
- ✘ After a minor blip over Easter, **Low-Cost** remains the most affected segment decreasing by **-86%** vs 2019.

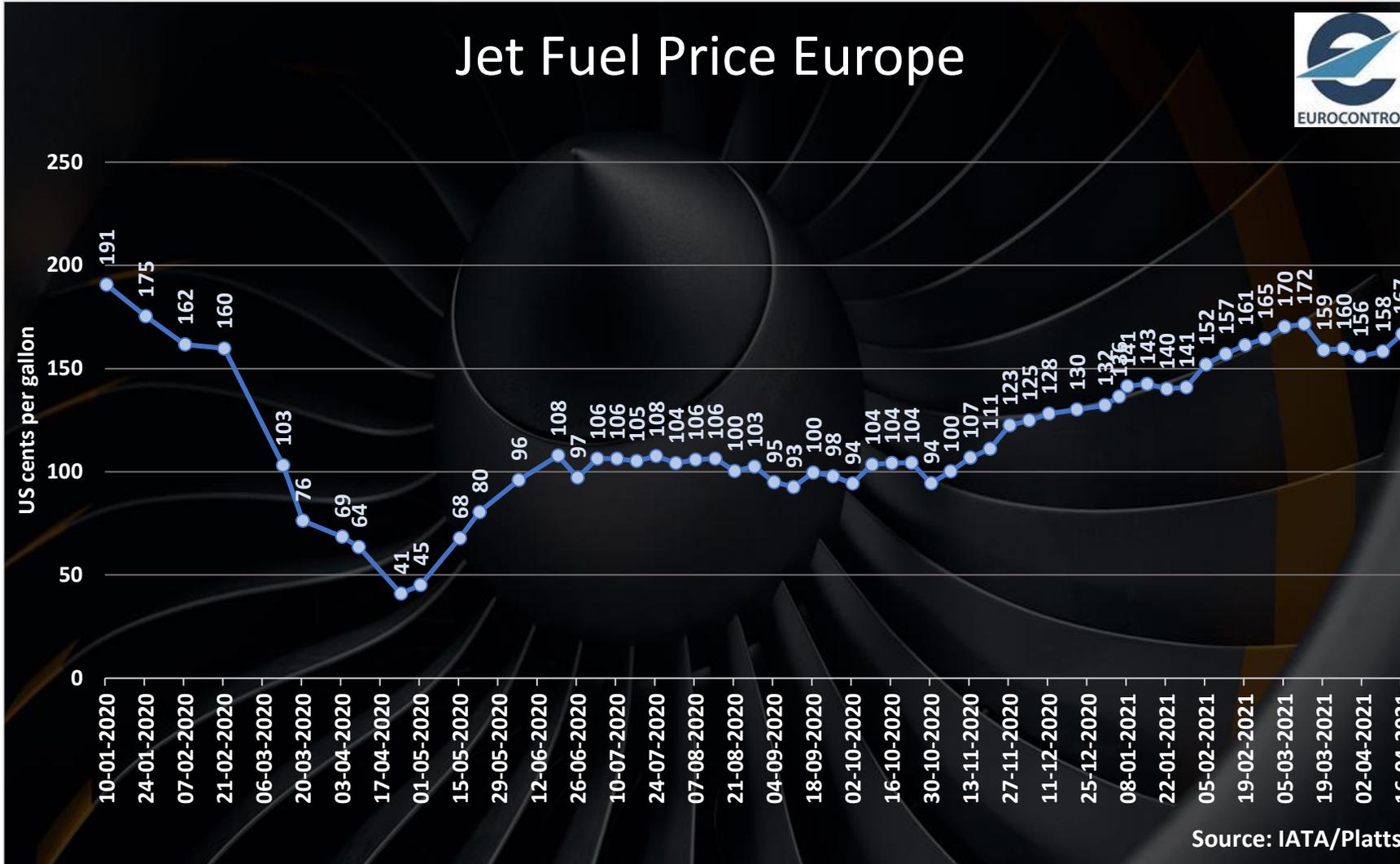
Vaccination updates



✘ 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 hand-side graph.

✘ On the right hand-side one: around 23 States reported that more than 25 doses per hundred people have been administered by 20 April 2021 (vs 8 on 13 April 2021).

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



✘ Jet fuel prices were stable since the beginning of March around 160 cts/gal and recorded an increase to **167 cts/gal** on 16 April 2021.

✘ Current prices are comparable to February 2020 levels, just before the COVID-19 outbreak start in Europe.

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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