

29 April 2021



COVID 19 IMPACT ON EUROPEAN AVIATION

EUROCONTROL
Comprehensive Assessment



SUPPORTING EUROPEAN AVIATION



NETWORK
MANAGER



Headlines

- 11,300 flights (36% of 2019 levels) on Wed 28 April 2021, increase (+3%) over 2 weeks.
- Slightly positive growth driven by increases in the Netherlands (+8%) and Germany (+5%) owing to KLM (NL) and regional operations (DE). However, some big States showed decreases over 2 weeks: Italy (-10%), Turkey (-3%), Spain and UK (-2% each).
- Highest increases for KLM (+10%) and Pegasus (+9%) thanks to increases on domestic flows. Largest drops for Ryanair (-27%): reduced traffic in Italy; and Lufthansa (-16%).
- Mixed situation for airports: Istanbul IGA (-14%) is slowing down while Athens traffic (+28%) is increasing (Orthodox Easter).
- Domestic traffic vs 2019: Europe (-62%), US (-30%), China (+15%), Middle-East (-48%).



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) was 3 weeks earlier than in 2019 (21 April 2019)]

Top 10 Aircraft Operators on Wed 28 April 2021 (daily flights)



2. Operated 350 flights
↓64%
of same day in 2019
↓3% over 2 weeks



3. Operated 335 flights
↑25%
of same day in 2019
↑3% over 2 weeks



1. Operated 672 flights
↓51%
of same day in 2019
↓2% over 2 weeks



4. Operated 291 flights
↓59%
of same day in 2019
↑10% over 2 weeks



5. Operated 286 flights
↑123%
of same day in 2019
↑4% over 2 weeks



6. Operated 280 flights
↓35%
of same day in 2019
↑9% over 2 weeks



7. Operated 254 flights
↓82%
of same day in 2019
↓16% over 2 weeks



8. Operated 181 flights
↓66%
of same day in 2019
↓0% over 2 weeks



9. Operated 181 flights
↓15%
of same day in 2019
↓1% over 2 weeks

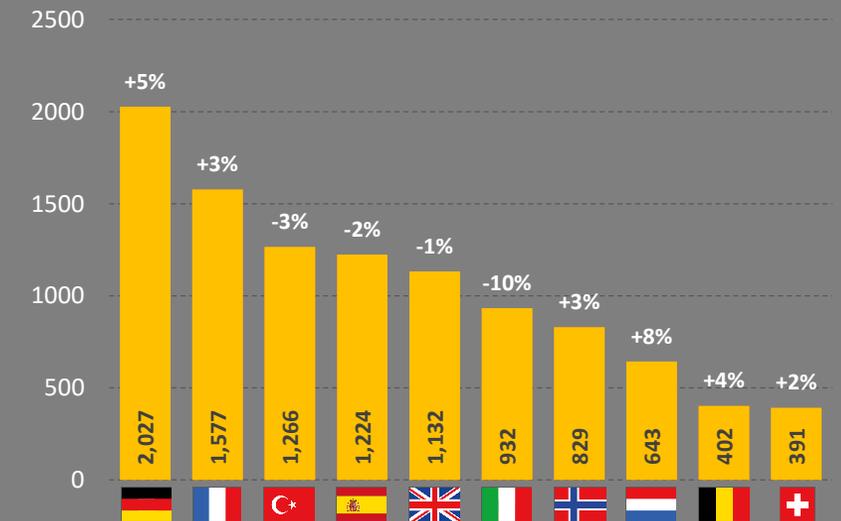


10. Operated 179 flights
↓93%
of same day in 2019
↓27% over 2 weeks

Top 10 Busiest States

on Wed 28 April 2021

(Dep/Arr flights and variation over 2 weeks)



Top 10 Busiest Airports

7-day average Dep/Arr flights on 22-28 April, compared to 2019

Top 10 Airports	Average flights per day (week 22-28/4)	Average flights per day (week 22-28/4) vs 2019
IGA Istanbul Airport	536	-55%
Amsterdam	498	-66%
Frankfurt	492	-66%
Paris/Charles-De-Gaulle	461	-68%
Madrid/Barajas	410	-65%
Istanbul/Sabiha Gokcen	349	-42%
London/Heathrow	340	-75%
Athens	255	-58%
Oslo/Gardermoen	208	-60%
Munich	208	-81%

Traffic Flow

On 28 April, the **intra-European** traffic flow was

8,492
flights

+4%
over past 2 weeks

-62%
compared to 2019

Market Segments

On 28 Apr, compared to 2019



↓ 87%

Low cost



↓ 68%

Traditional



↓ 16%

Business Aviation



↓ 35%

Non-Scheduled/
Charter



↑ 22%

All Cargo

This increase of +22% is related to the Easter 2019 vs 2021 dates.

Economics

(23 April 2021)

Fuel price

↓ 165

Cents/gallon

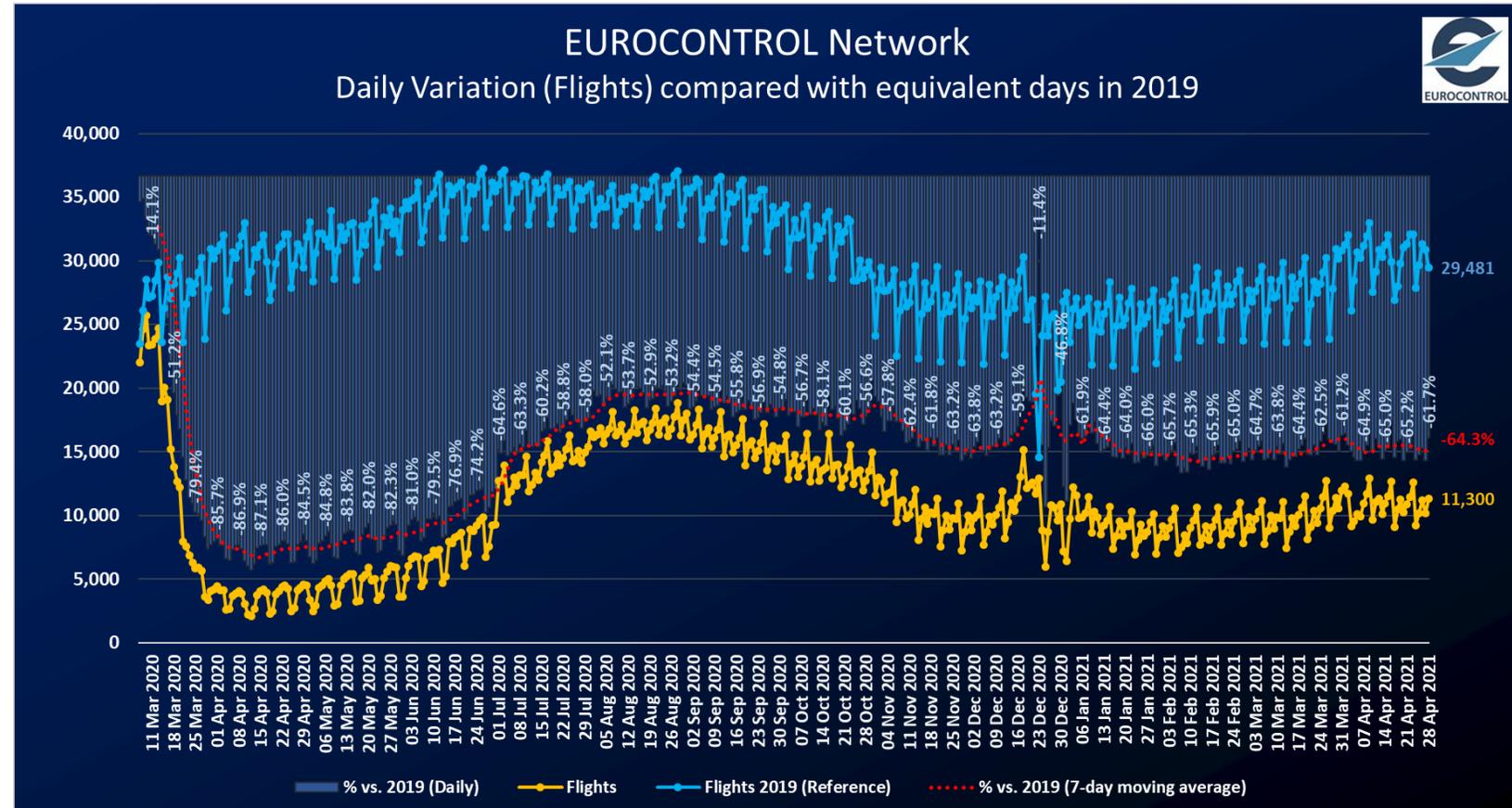
compared to **167 cents/gallon**
on **16 Apr 2021**

Source: IATA/Platts

Overall traffic situation at network level



- ✂ **11,300 flights** on Wednesday 28 April.
- ✂ **Slight increase (+3%) with +355 flights** over 2 weeks (from Wed 14 April).
- ✂ **Slight increase (+4%) with 405 flights** over 1 week (from Wed 21 April).
- ✂ **38%** of 2019 traffic levels.



Current situation and scenarios



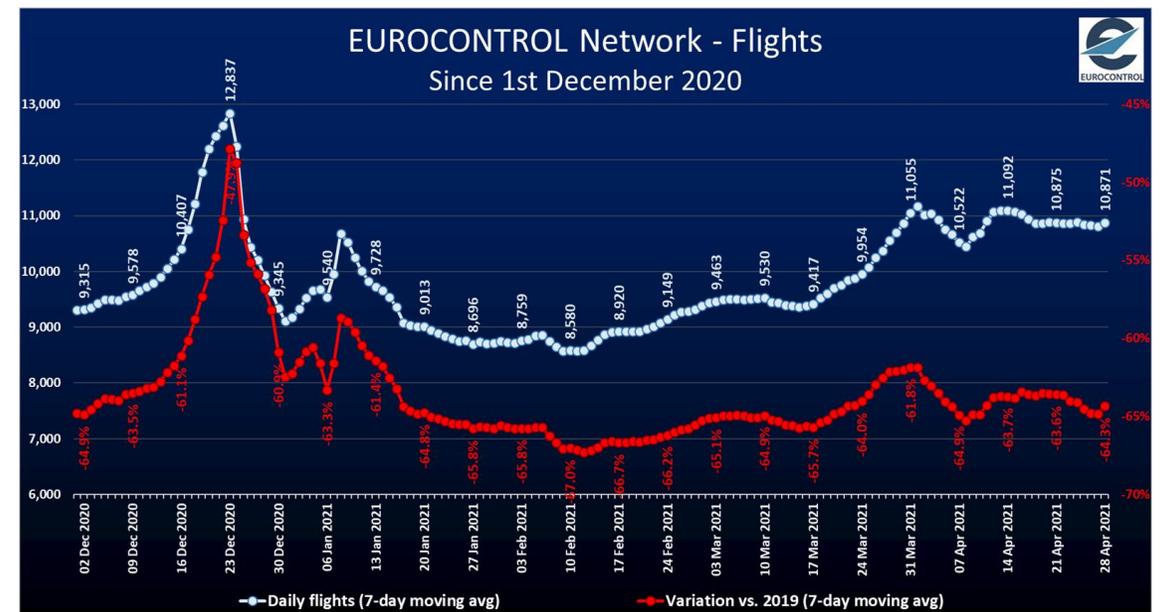
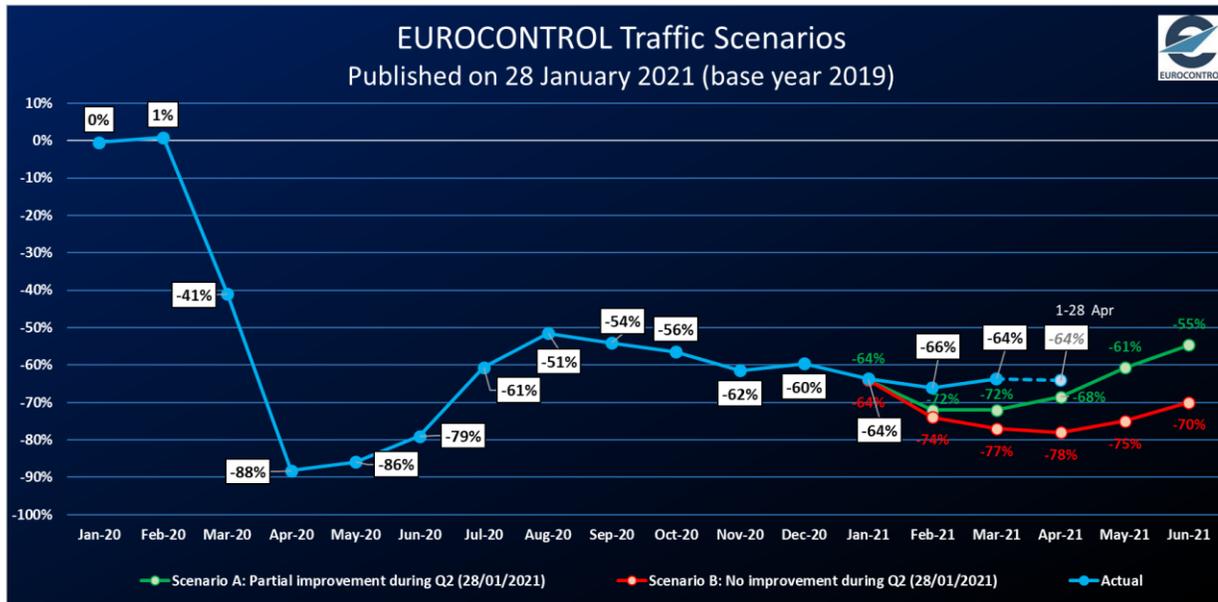
✘ **Traffic at -64% on 1-28 April 2021 vs 1-28 April 2019**, slightly above the latest EUROCONTROL traffic scenarios published on 28 January 2021 mainly due to:

- 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



Rank evolution over 2 weeks	Top 10 Aircraft Operators on Wed 28-04-2021				
	Aircraft Operator	Flights	Δ over 2 weeks	% over 2 weeks	% vs 2019
→	TURKISH AIRLINES	672	↓ -11	-2%	↓ -51%
→	AIR FRANCE	350	↓ -12	-3%	↓ -64%
→	WIDEROE	335	↑ +11	+3%	↑ +25%
↑	KLM ROYAL DUTCH AIRL	291	↑ +27	+10%	↓ -59%
→	DHL EXPRESS	286	↑ +10	+4%	↑ +123%
↑	PEGASUS HAVA TASI.	280	↑ +22	+9%	↓ -35%
↓	DEUTSCHE LUFTHANSA	254	↓ -50	-16%	↓ -82%
↑	ALITALIA	181	→ +0	+0%	↓ -66%
↑	SCANDINAVIAN AIRLINES SYSTEM	181	→ -1	-1%	↓ -15%
↓	RYANAIR	179	↓ -67	-27%	↓ -93%

- ✘ **Turkish Airlines** is the busiest airlines despite a decrease over 2 weeks (-2%), mainly due to flows from/to Germany and Russia.
- ✘ Positive change in the ranking over 2 weeks for **KLM, Pegasus, Alitalia** and **SAS**.
- ✘ Highest increase for **KLM** (+10%) driven by domestic flows in the Netherlands (some aircraft parked outside AMS, round-robin flights) as well as flows with UK and Spain.
- ✘ Highest decreases for **Ryanair** (-27%) (domestic flows in Italy) and **Lufthansa** (-16%) (flows between Germany and France, Sweden, Poland as well as domestic).

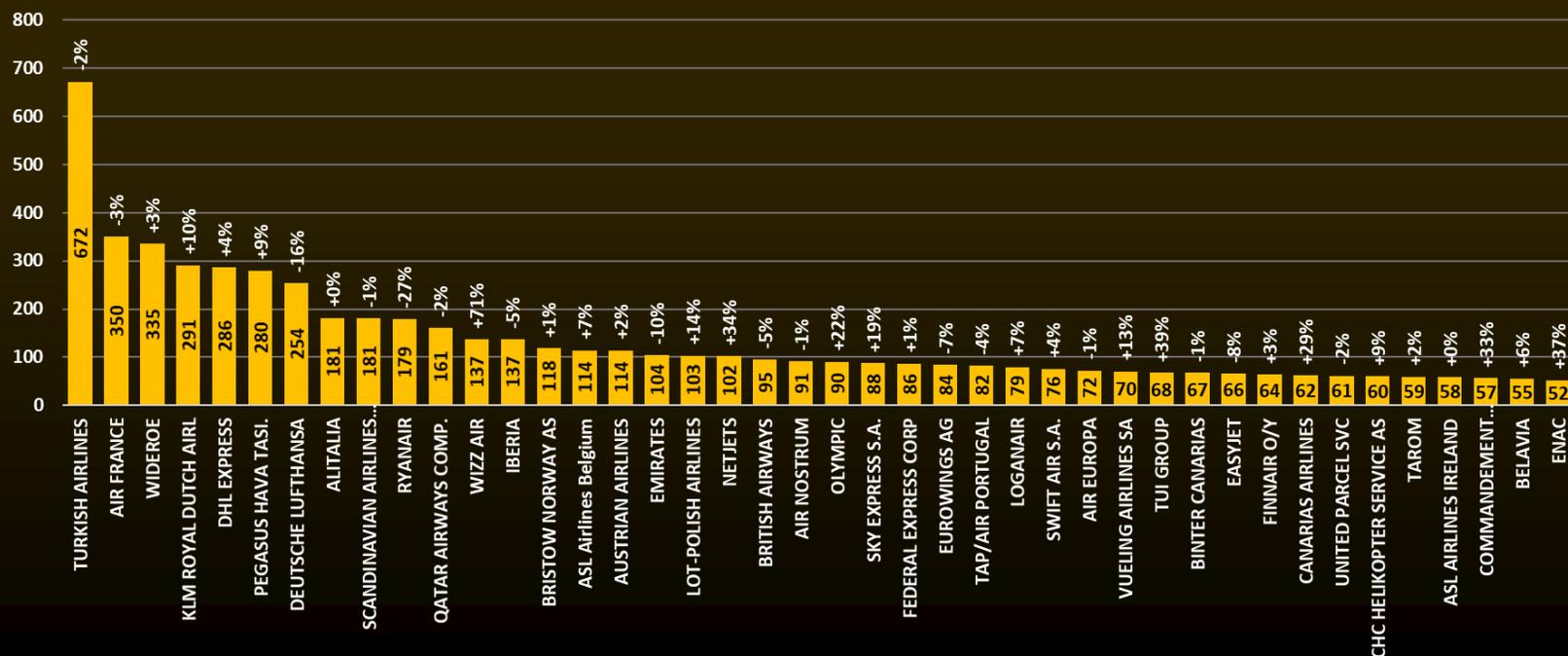
Aircraft operators (Daily flights)

Top 40 – Latest operations



Aircraft operators

Traffic on Wed 28-04-2021 and evolution compared to Wed 14-04-2021



Aircraft Operators in EUROCONTROL Network (compared with equivalent days in 2019) Daily Variation (IFR Flights) - Wed 28 Apr 2021



- ✘ Highest increase for **Wizz Air** (flows between Romania and Italy/Germany/UK).
- ✘ Highest decreases for **Ryanair** and **Lufthansa**.
- ✘ Ryanair 10th, Wizz Air 12th, British Airways 20th and easyJet 33rd.
- ✘ Traffic levels ranging from -100% (Brussels Airl.) to +25% (Wideroe) compared to 2019*

*Equivalent day in 2019 is 1st May 2019. Comparisons must then be considered with care.

Aircraft operators

Latest news



European airlines

- ✘ **Austrian Airlines** reports that it is increasingly focused on Mediterranean destinations for summer 2021.
- ✘ **Brussels Airlines** states that it plans to operate to 79 destinations this summer, of which 43 will be opened 'gradually between now and August', including 4 new destinations (Bordeaux, Al Hoceima, Tangier & Nador).
- ✘ **Croatia Airlines** plans to offer regular services to 13 European destinations from May.
- ✘ **Finnair** plans to serve over 60 destinations this summer, with a focus on leisure destinations; reports net loss of €145M in Q1.
- ✘ **IAG** commits to powering 10% of its services with sustainable aviation fuel by 2030.
- ✘ **Ryanair** announces 10,000 weekly frequencies across 500 routes for its summer 2022 schedule.
- ✘ **TAP Air Portugal** state loan of €462M approved by the European Commission.

Worldwide airlines

- ✘ **Aeromexico** agrees to acquire four new 787-9s and 24 737 MAX aircraft.
- ✘ **Alaska Airlines** targets net zero carbon emissions by 2040.
- ✘ **American Airlines Group** \$1.3Bn operating loss in Q1 2021; Q1 passenger numbers down 42.6% on 2020 (revenue passenger miles were down 50.3%: domestic -41.8%, international -70.5%); Q1 2020 numbers were 15.5% down on 2019 (RPM -16.6%: domestic -15.5%, international -22.1%).
- ✘ **Cathay Pacific** planning to close its Canadian pilot base and re-evaluating other overseas bases.
- ✘ **Emirates** plans to operate A380 aircraft on a twice daily service to Frankfurt during the first half of May.
- ✘ **Qatar Airways** CEO states that there is 'no future' for the A380 as it invests in more fuel efficient aircraft.
- ✘ **South African Airways** may resume regular operations in July/August this year.
- ✘ **United Airlines** plans to operate 67% of its domestic schedule in June (compared to 2019).

States (Daily Departure/Arrival flights)

Top 10



Rank evolution over 2 weeks	Top 10 States on Wed 28-04-2021				
	State	Flights (Dep/Arr)	Δ over 2 weeks	% over 2 weeks	% vs 2019
→	Germany	2027	↗ +93	+5%	↘ -63%
→	France	1577	↗ +51	+3%	↘ -60%
→	Turkey	1266	↘ -44	-3%	↘ -57%
→	Spain	1224	↘ -29	-2%	↘ -73%
→	United Kingdom	1132	↘ -13	-1%	↘ -82%
→	Italy	932	↘ -101	-10%	↘ -75%
→	Norway	829	↗ +24	+3%	↘ -23%
→	Netherlands	643	↗ +50	+8%	↘ -64%
→	Belgium	402	↗ +17	+4%	↘ -56%
→	Switzerland	391	↗ +7	+2%	↘ -71%

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

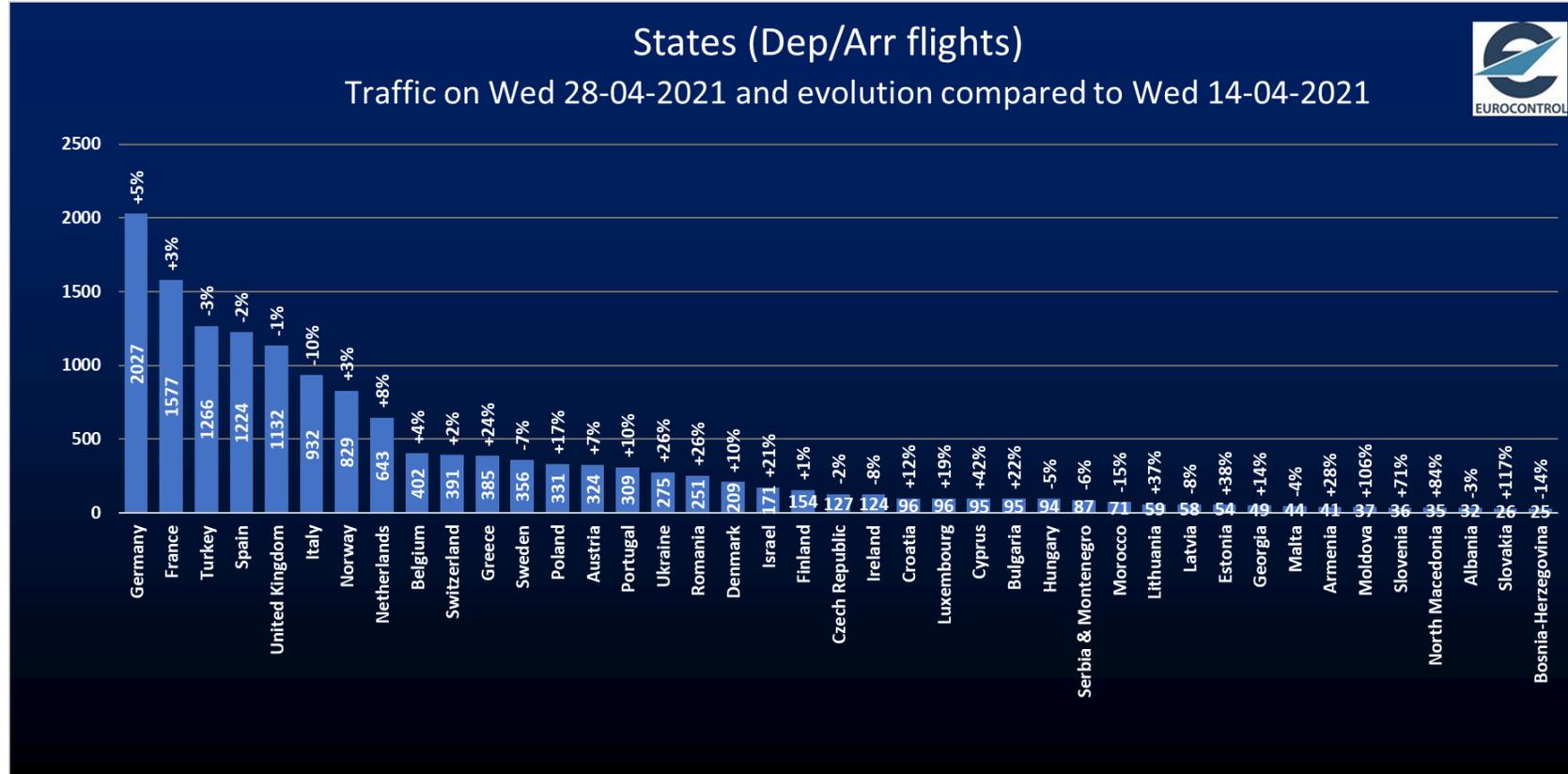
- **Netherlands (+8%)** mainly driven by KLM on flows with UK, Belgium, domestic,
- **Germany (+5%)**, driven by light aircraft operators on regional flows (domestic).

✘ Highest decreases over 2 weeks for:

- **Italy (-10%)** (Ryanair and light aircraft operators; decreases on domestic flows mainly)
- **Turkey (-3%)** (SunExpress and light aircraft operators; flows with Russia and Germany). To be noted: some increases from Turkish Airlines and Pegasus on domestic flows.
- **Spain (-2%)** (flows with UK) and **UK (-1%)** (domestic, flows with Spain).

States (Daily Departure/Arrival flights)

Latest traffic situation



- ✘ Highest increases for Slovakia (+117%), Moldova (+106%) & North Macedonia (+84%).
- ✘ Highest decreases for Bosnia-Herzegovina (-14% over 2 weeks), Morocco (-15%).
- ✘ Traffic levels ranging from -87% (Morocco) to -23% (Norway) compared to 2019*.

*Equivalent day in 2019 is 1st May 2019. Comparisons must then be considered with care.

States, Associations & Industry



✂ **Boeing** delivers its 1,000th 787 aircraft, to China Southern Airlines; still working to fully identify and address an electrical issue with the 737 MAX.

✂ **IATA** estimates that the airline industry will make losses of \$47.7 billion in 2021, \$22.2 billion of which will be in Europe; urges European States to support the European Commission SES proposals; expects much higher fuel prices than previously forecast; agrees with Unilabs to incorporate test results in the IATA Travel Pass.

✂ **ACI Europe** notes that another 2,000 air routes have ceased operation just this year and estimates that European airports could lose another €29 billion in revenue this year with passenger numbers not set to recover to 2019 levels until 2025.

✂ **France (DGAC)** reports March passenger numbers down 86% on 2019 (domestic-73%, international -90%).

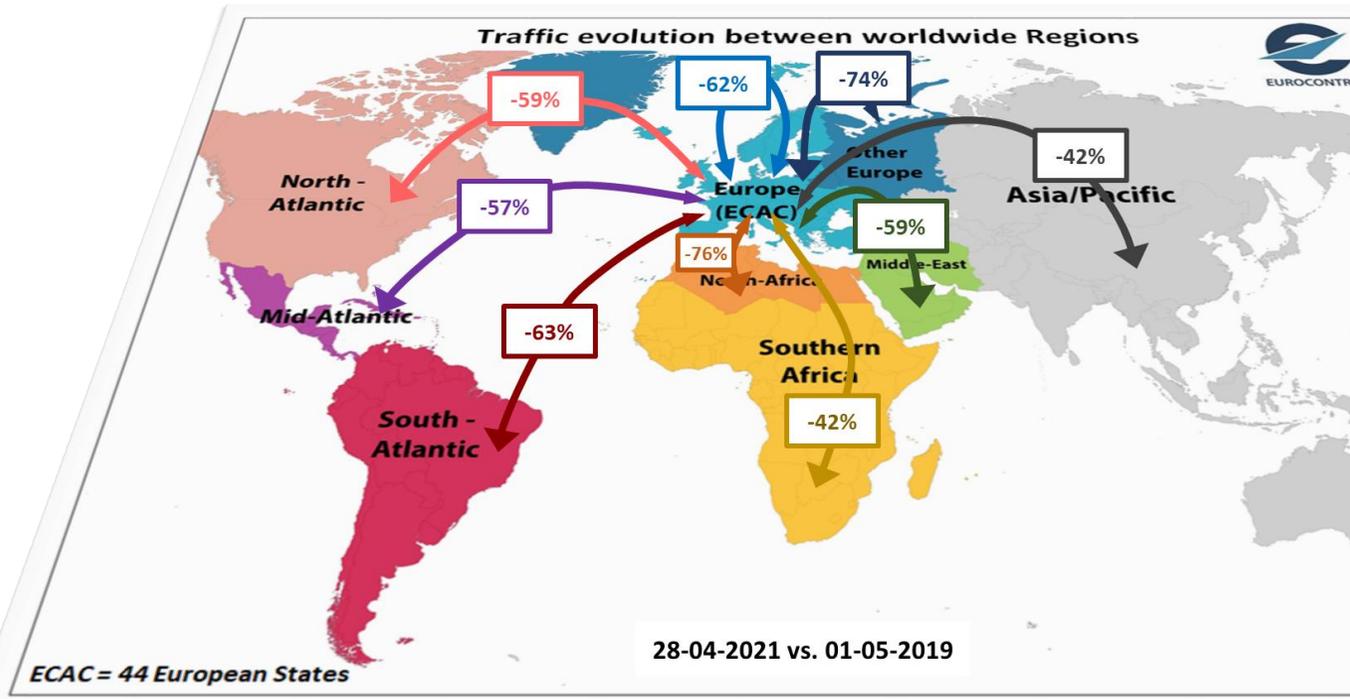
✂ **Panama's** Government accepts the IATA Travel Pass as a digital travel credential; several airlines are now trialling this pass.

✂ **Turkey's** Government announces nationwide "full lockdown" from April 29 to May 17 to curb COVID spread, intercity travel would require official approval.

Traffic flows (Daily Departure/Arrival flights)



- ✘ The main traffic flow is the intra-Europe flow with 8,492 flights on Wednesday 28 April, which is increasing (+4%) over 2 weeks.
- ✘ Intra-Europe flights are still 62% below 2019 levels while intercontinental flows are running 62% below.



REGION	14-04-2021	28-04-2021	%	vs. 2019
Intra-Europe	8 144	8 492	+4%	-62%
Europe<->Asia/Pacific	411	440	+7%	-42%
Europe<->Mid-Atlantic	64	66	+3%	-57%
Europe<->Middle-East	569	540	-5%	-59%
Europe<->North Atlantic	462	482	+4%	-59%
Europe<->North-Africa	248	227	-8%	-76%
Europe<->Other Europe	357	316	-11%	-74%
Europe<->South-Atlantic	57	64	+12%	-63%
Europe<->Southern Africa	167	164	-2%	-42%
Non Intra-Europe	2 335	2 299	-2%	-62%

Country pairs (Daily Departure/Arrival flights)

Top 10

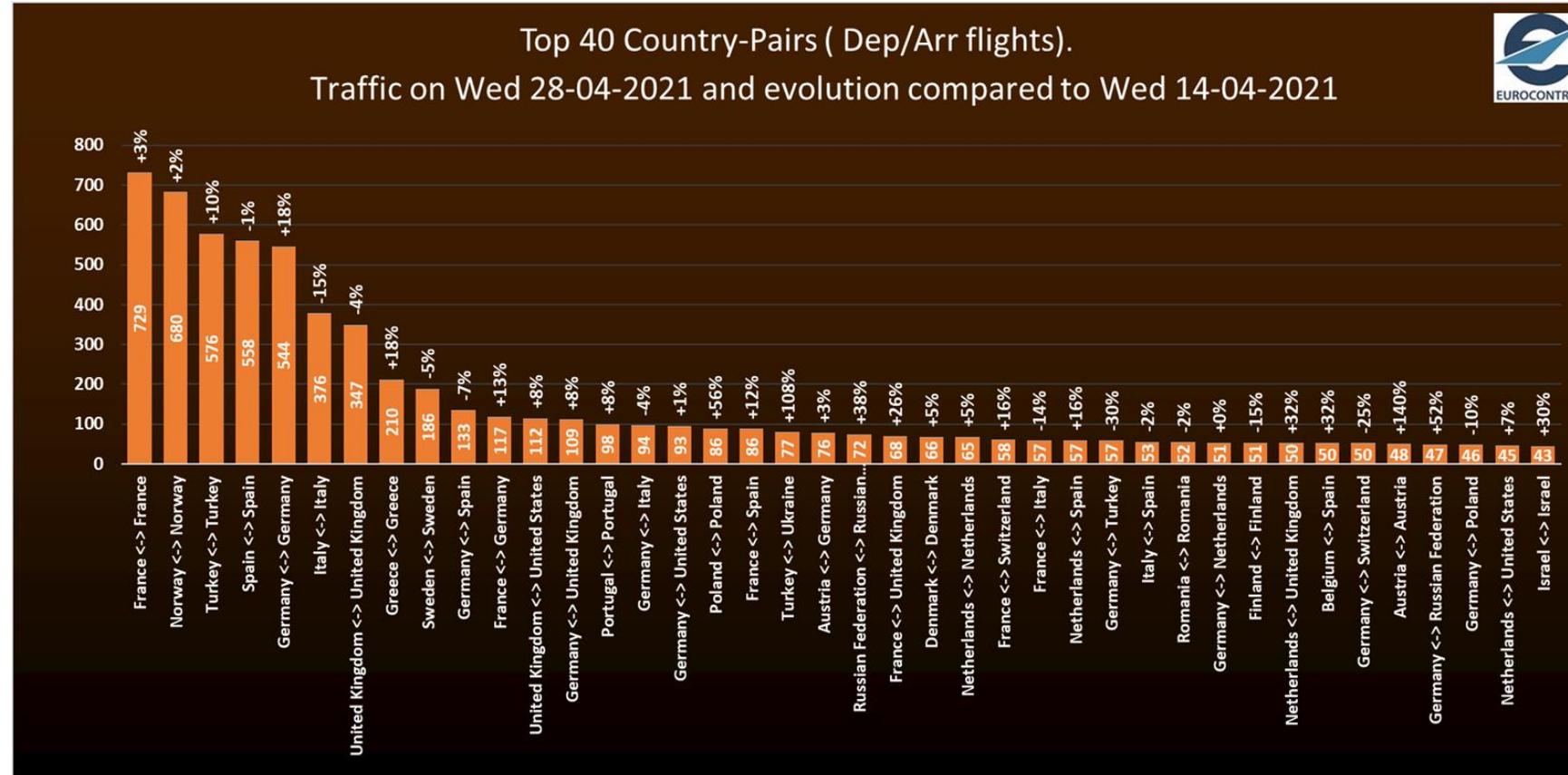


Rank evolution over 2 weeks	Top 10 Country-Pair on Wed 28-04-2021				
	Country-Pair	Dep/Arr Flights	Δ over 2 week	% over 2 week	% vs 2019
→	France <-> France	729	↗ +22	+3%	↘ -12%
→	Norway <-> Norway	680	↗ +14	+2%	↗ +29%
↗	Turkey <-> Turkey	576	↗ +53	+10%	↘ -38%
↘	Spain <-> Spain	558	↘ -6	-1%	↘ -48%
→	Germany <-> Germany	544	↗ +84	+18%	↘ -37%
→	Italy <-> Italy	376	↘ -66	-15%	↘ -53%
→	United Kingdom <-> United Kingdom	347	↘ -13	-4%	↘ -71%
↗	Greece <-> Greece	210	↗ +32	+18%	↘ -35%
↘	Sweden <-> Sweden	186	↘ -10	-5%	↗ +33%
→	Germany <-> Spain	133	↘ -10	-7%	↘ -77%

- ✘ 9 of the top 10 flows are domestic.
- ✘ Highest **increases** in flights over 2 weeks for domestic flows in
 - **Germany** (+18%) mainly due to small aircraft,
 - **Greece** (+18%) thanks to Sky Express and Olympic,
 - **Turkey** (10%) owing to Pegasus and Turkish Airlines
- ✘ Highest **decreases** for domestic flows in:
 - **Italy** (-15%) mainly due to Ryanair, light aircraft operators and Wizz Air.

Country pairs (Daily Departure/Arrival flights)

Latest traffic situation



✖ The busiest non-domestic flows were:

- **Germany-Spain** (133 flights, -7% over 2 weeks).
- **France-Germany** (117, +13%).
- **UK-US** (112, +8%).
- **Germany-UK** (109, +8%).
- **Germany-Italy** (94, -4%).

✖ High decrease for the flow **Germany-Turkey** (-30%)

Outside Europe

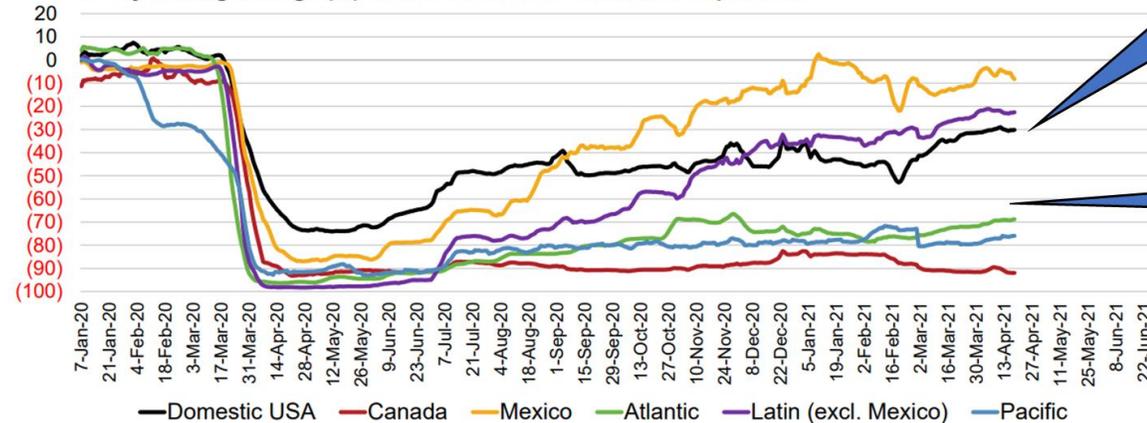


USA

- ✘ Rising vaccination rates and recent headlines have given air travellers the confidence to book U.S.-International trips farther in advance, now averaging 98 days before departure.
- ✘ US domestic recorded a decline of 30% (vs 2019) and international traffic recorded a decline of 43% (vs 2019) on 28 April.
- ✘ On 28 April, US airline passenger volumes were 43% below 2019 levels with domestic down 40% and international down 60%.
- ✘ The domestic US load factor is stable over a month, averaging at 73% on most recent week (was 87% in same week of 2019).
- ✘ From the 3rd week of April, airfares* are 29% below pre-pandemic levels: fares remain depressed due to discounting on leisure/VFR and dearth of business travel.

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



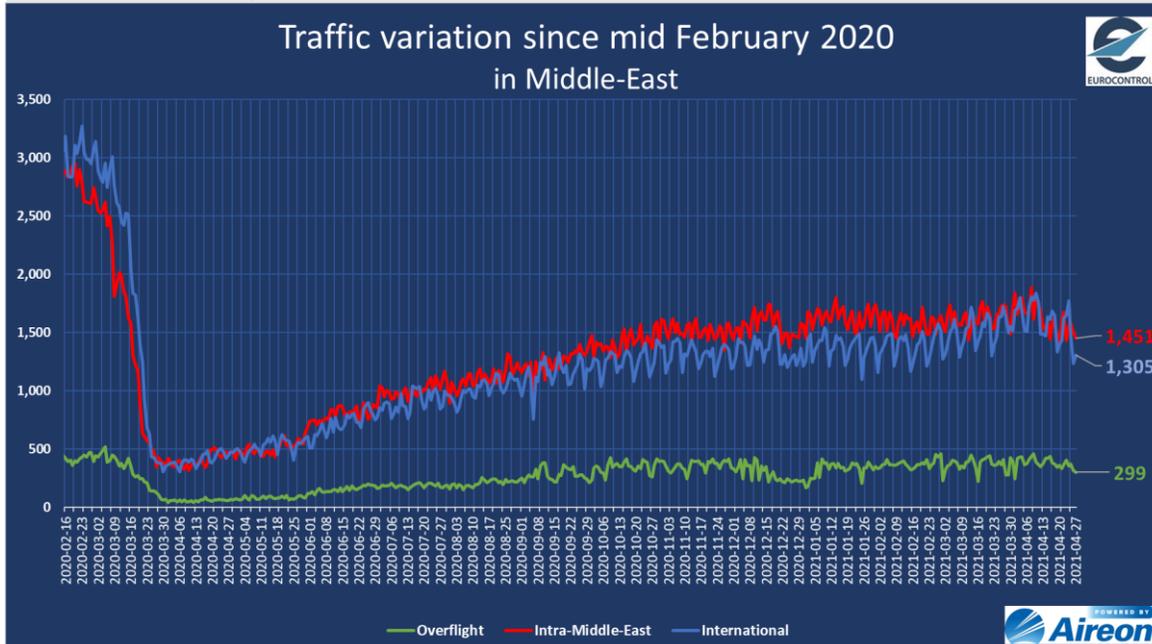
* Net fares (gross sales minus refunds) sold in the United States for future travel to/from U.S. airports

Outside Europe



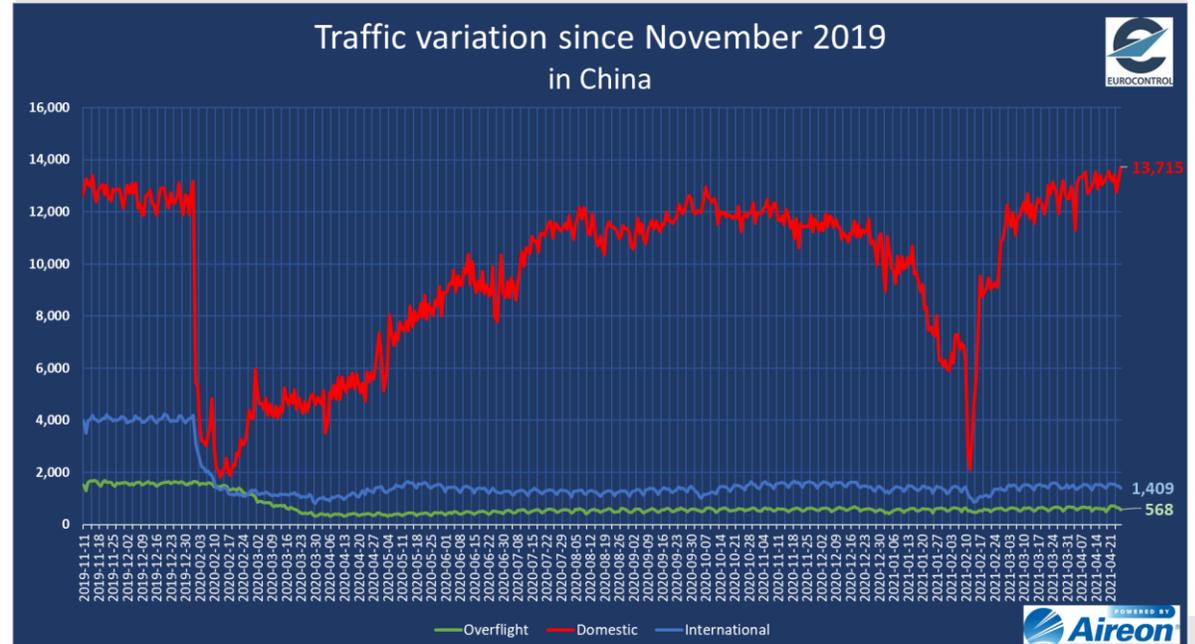
Middle East

- ✘ Intra-Middle-East traffic recorded 1,451 daily flights on 27 April (-48% compared to Feb 2020).
- ✘ International traffic from/to Middle-East recorded each 1,305 daily flights on 27 April (-57% compared to Feb 2020 respectively).
- ✘ Overflights have remained relatively stable around 300 flights (-30% compared to Feb 2020) over the recent weeks.



China

- ✘ On 26 April, domestic traffic recorded 13,715 flights (+15% compared to January 2020 levels).
- ✘ International flights and overflights are still suppressed, they were stable on previous weeks with 1,409 and 568 flights respectively (-65% and -64% respectively vs 1 Jan 2020).
- ✘ **Hong Kong-Singapore** air travel bubble scheduled to commence on 26 May.



Airports (Daily Departure/Arrival flights)

Top 10 and latest news

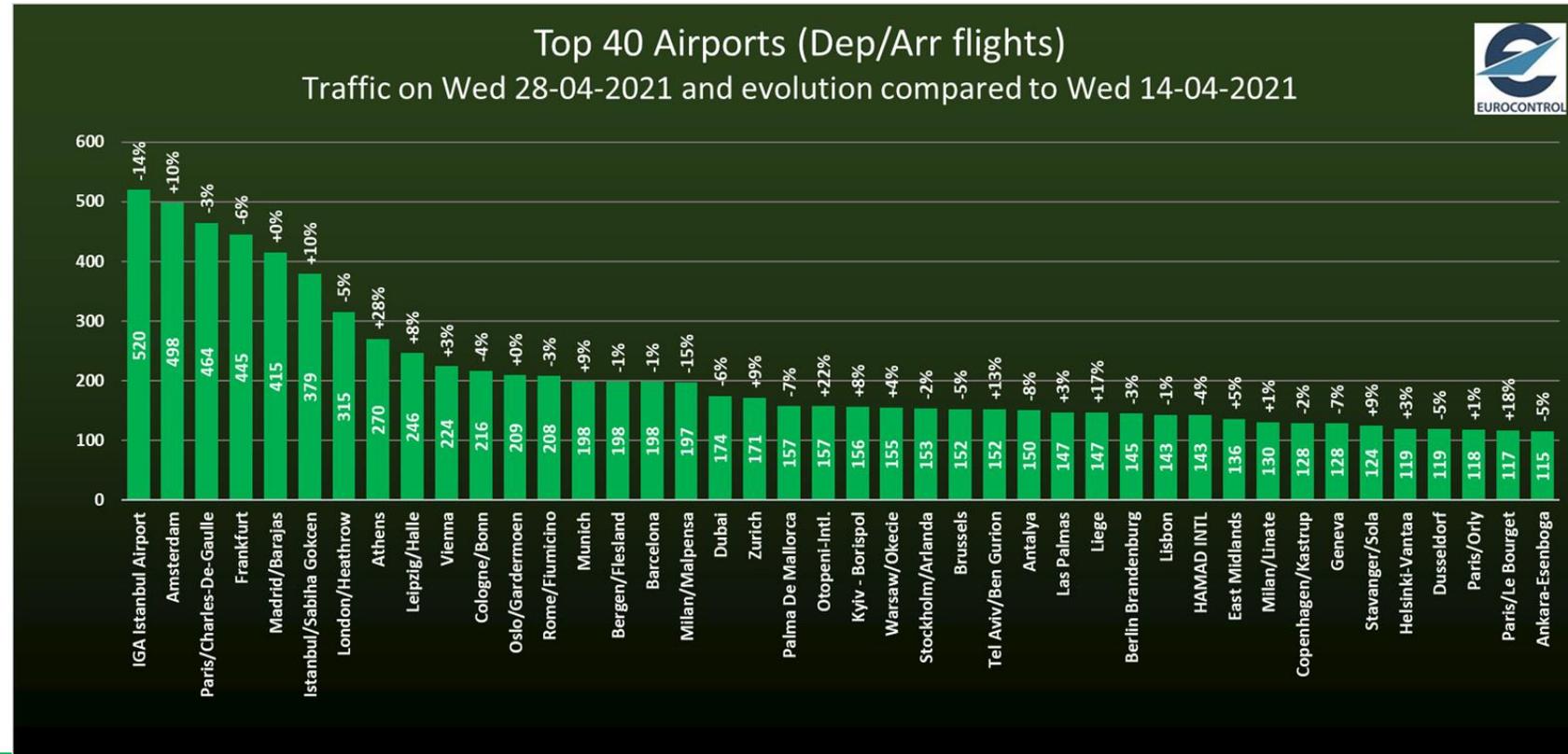


Rank evolution over 2 weeks	Top 10 Airports on Wed 28-04-2021				
	Airport	Dep/Arr Flights	Δ over 2 weeks	% over 2 weeks	% vs 2019
→	IGA Istanbul Airport	520	↘ -85	-14%	↘ -57%
↗	Amsterdam	498	↗ +47	+10%	↘ -66%
↘	Paris/Charles-De-Gaulle	464	↘ -14	-3%	↘ -65%
↘	Frankfurt	445	↘ -29	-6%	↘ -69%
→	Madrid/Barajas	415	→ +1	+0%	↘ -64%
→	Istanbul/Sabiha Gokcen	379	↗ +34	+10%	↘ -37%
→	London/Heathrow	315	↘ -15	-5%	↘ -77%
↗	Athens	270	↗ +59	+28%	↘ -56%
→	Leipzig/Halle	246	↗ +18	+8%	↗ +45%
↗	Vienna	224	↗ +6	+3%	↘ -73%

- ✘ Balanced mix of “ups” and “downs” for the top 10 airports.
- ✘ Highest increase for **Athens** (+28%) mainly due to Olympic, SkyExpress and Aegean on domestic flows and flows from/to France or Germany.
- ✘ Largest decrease for **IGA Istanbul Airport** (-16%) mainly due to Turkish Airlines as well as domestic flows and flows from/to Russia, Germany.

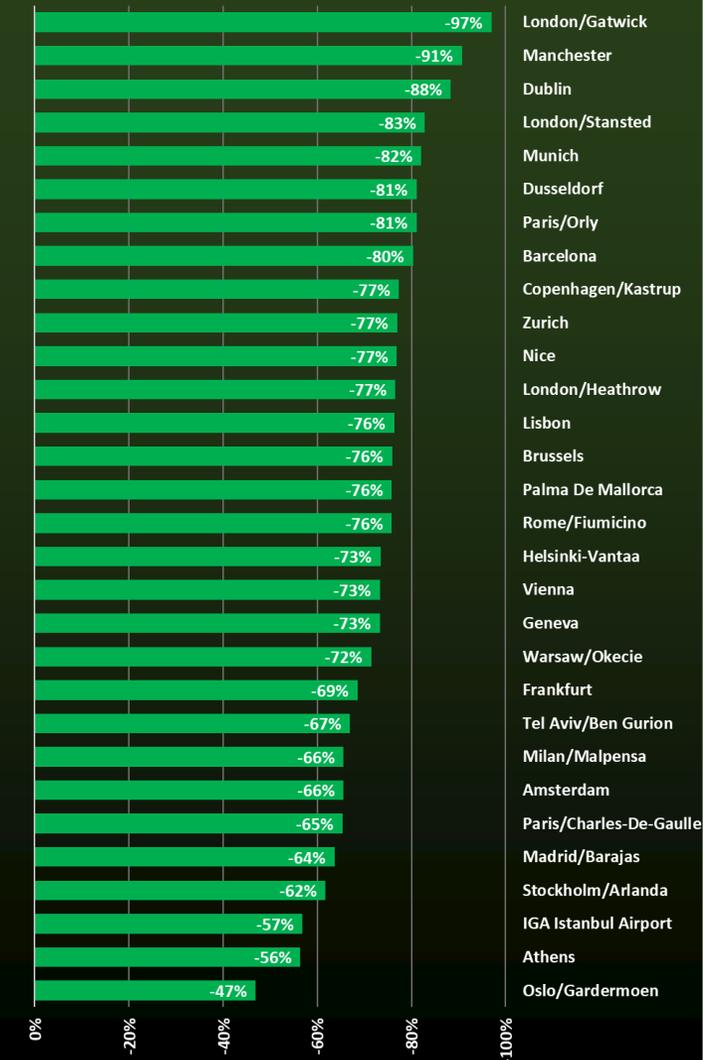
Airports (Daily Departure/Arrival flights)

Latest operations



Airports in EUROCONTROL Network (compared with equivalent days in 2019)

Daily Variation (IFR Dep/Arr Flights) - Wed 28 Apr 2021



- ✘ Largest increases for **Athens (+28%)**, **Bucarest Otopeni (+22%)**, **Paris Le Bourget (+18%)**.
- ✘ Largest decreases for **Milan Malpensa (-15%)**, **IGA Istanbul (-14%)**, **Antalya (-8%)**, **Palma de Mallorca (-7%)**, **Geneva (-7%)**.
- ✘ Traffic levels ranging from **-97% (Gatwick)** to **-47% (Oslo)** compared to 2019*.

*Equivalent day in 2019 is 1st May 2019. Comparisons must then be considered with care.

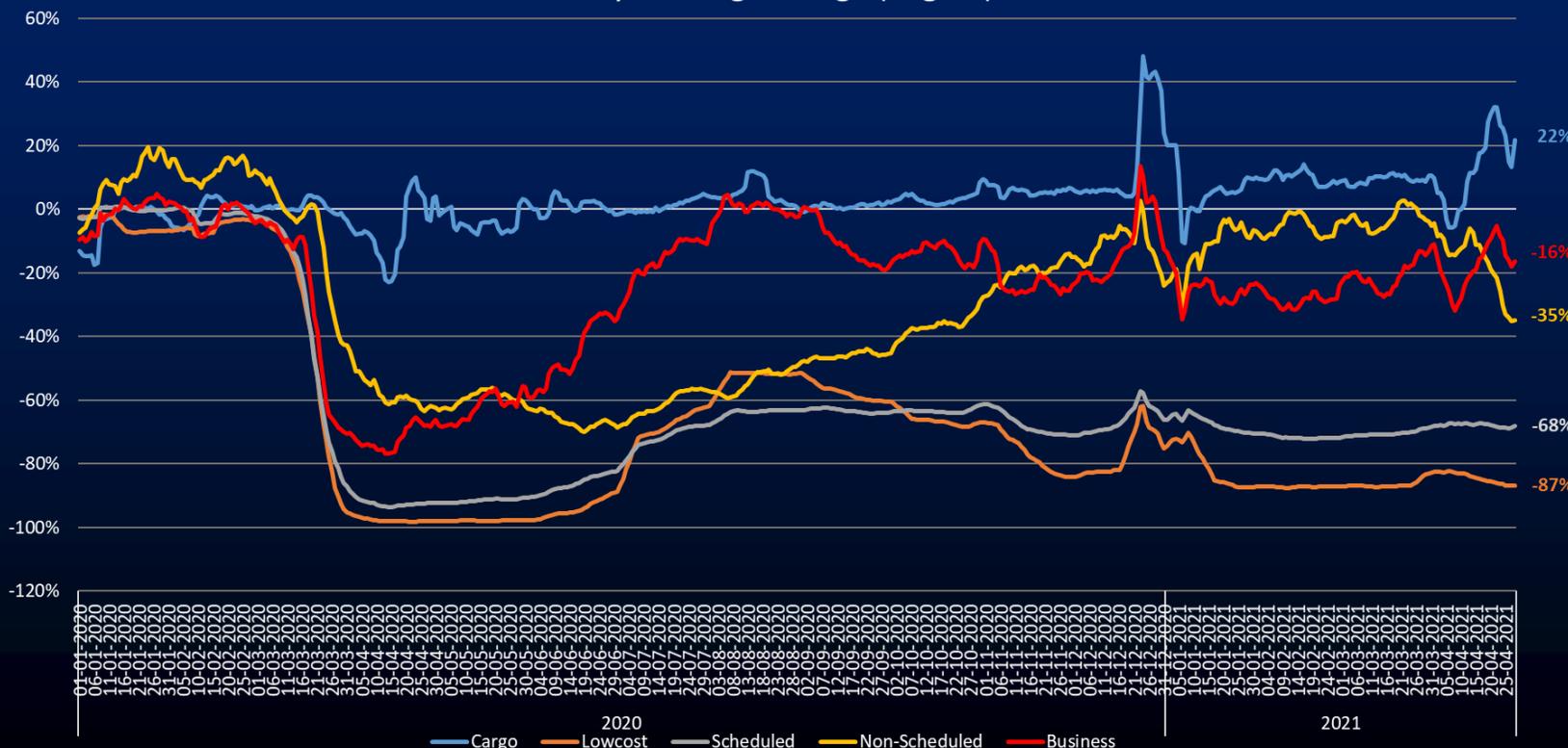


- ✘ **Aeroporti di Roma** completes the placement of a €500M sustainability linked bond, with the cost of the debt linked to the sustainability achieved at the operator's airports.
- ✘ **Cape Town Airport** reports March passenger numbers down 61% on 2019 (domestic -51%, regional -80%, international -91%).
- ✘ **German Airports Association** reports March passenger numbers down 89.7% on March 2019, to under 2 million.
- ✘ **Johannesburg Airport** reports March passenger numbers down 63% on 2019 (domestic -46%, regional -81%, international -86%).
- ✘ **London Heathrow** is allowed by the UK CAA to increase its asset base by £300 million (and thus increase charges), much lower than it wanted; IATA has expressed 'deep frustration' at the increase.
- ✘ **Manchester Airports Group** reports March passenger numbers 96.8% down on March 2019 (Manchester -95.3%, London Stansted -97.9%, East Midlands -99.9%).
- ✘ **Singapore Changi Airport** reports year-on-year March passenger numbers down 90% and cargo up 5.5%; March 2020 was respectively 70.7% and 19.1% down on March 2019.

Market Segments



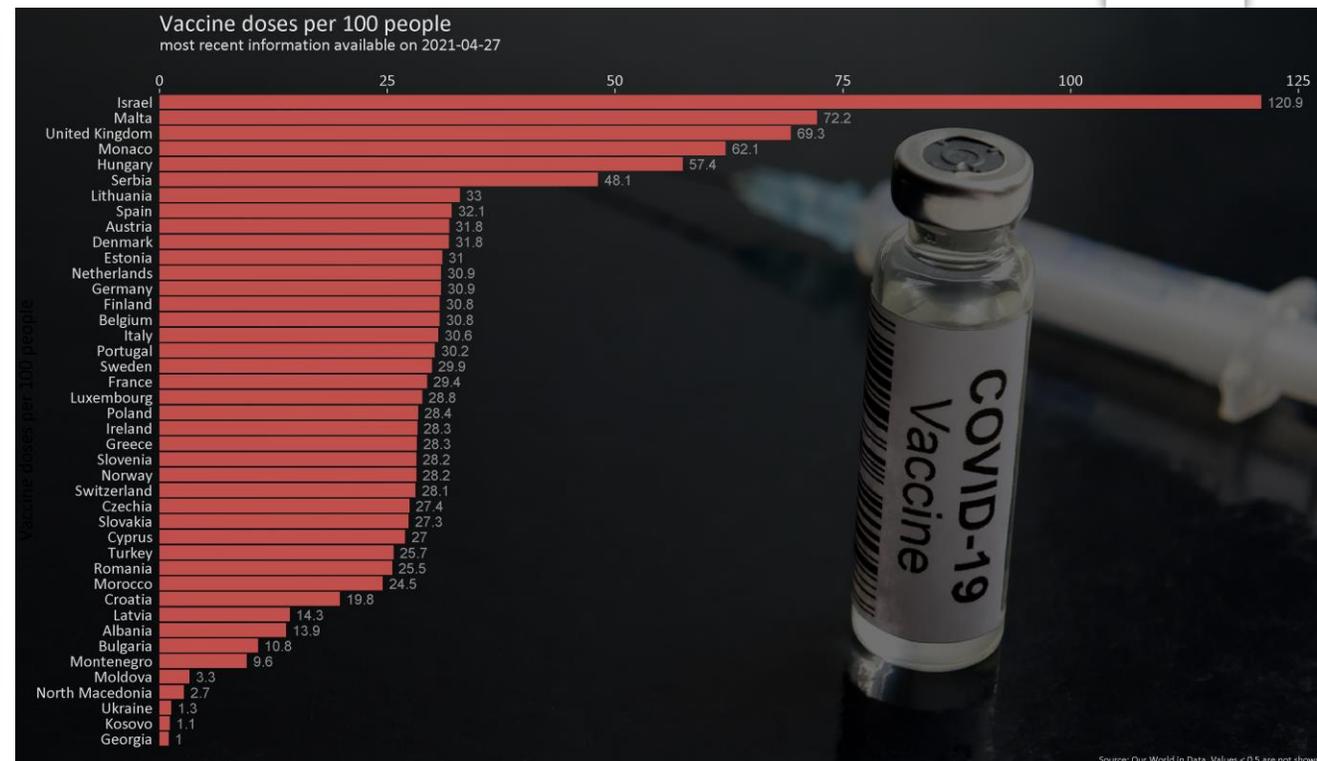
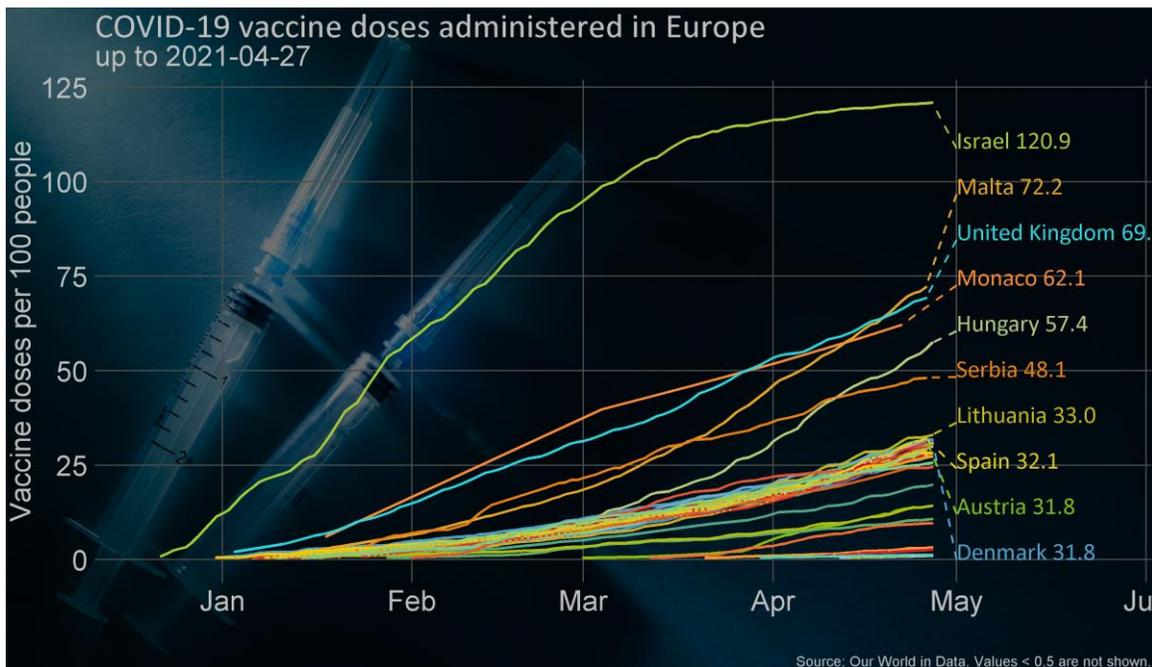
Market segments in EUROCONTROL Network
(compared with equivalent days in 2019)
7-day moving average (Flights)



The evolution of the segments is now almost getting back to pre-Easter trends. On 28 April 2021, compared to 2019:

- ✘ **All-cargo** is the only segment increasing with **+22%**. This huge increase is clearly related to the Easter 2019 vs 2021 dates.
- ✘ **Charter** decreased to **-35%**.
- ✘ **Business Aviation** decreased to **-16%**.
- ✘ **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.

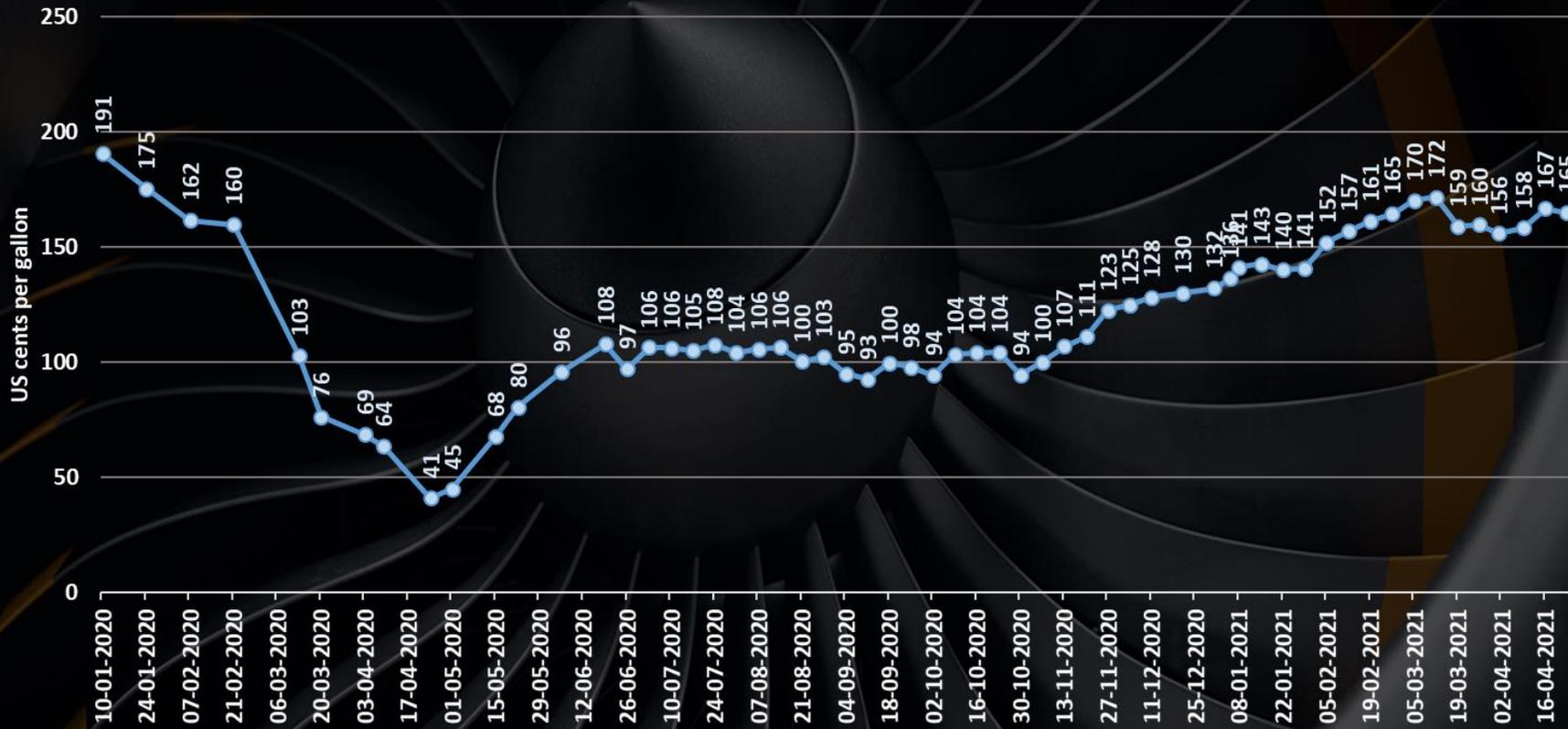
✘ On the right hand-side one: around 32 States reported that more than 25 doses per hundred people have been administered by 27 April 2021 (vs 23 on 20 April 2021).

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

Economics



Jet Fuel Price Europe



Source: IATA/Platts

- ✖ Jet fuel recorded a slight decrease to **165 cts/gal** on 23 April 2021 (vs 167 cts/gal a week before).
- ✖ 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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