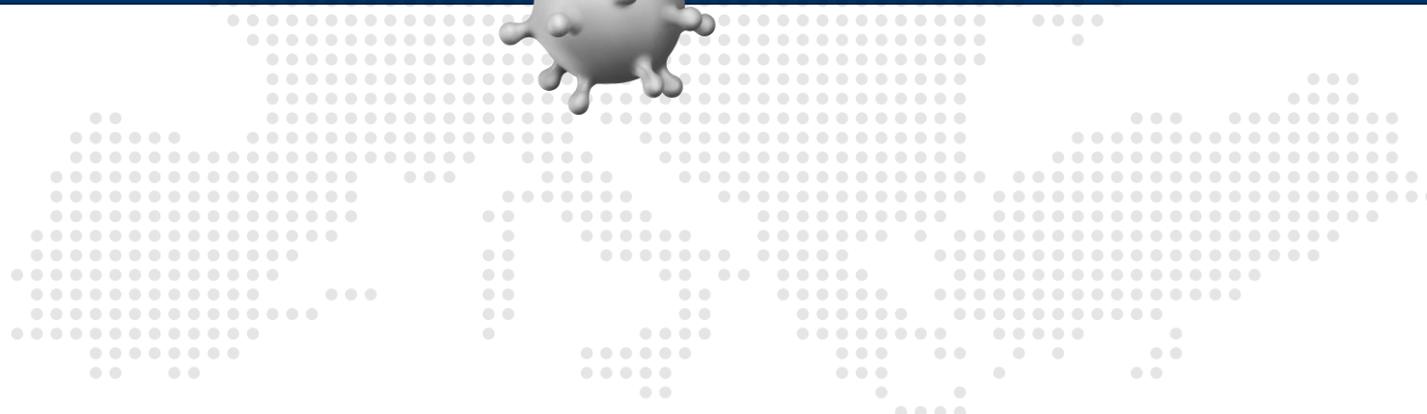


20 May 2021



COVID 19 IMPACT ON EUROPEAN AVIATION

EUROCONTROL
Comprehensive Assessment



SUPPORTING EUROPEAN AVIATION



NETWORK
MANAGER



Headlines

- 12,623 flights (38% of 2019 levels) on Wed 19 May 2021, increase (+12%) over 2 weeks.
- Traffic starting to increase over the last 2 weeks after having been flat vs 2019 since January
- Huge impact on traffic due to relaxation of lockdown in Turkey (+52% over 2 weeks), Turkish airports (Sabiha (+132%), IGA (+21%)) as well as Turkish airlines (+31%) and Pegasus (+186%)
- Increase for France (+14%)(Domestic), UK (+20%)(Domestic + flows with Portugal and Greece) and Germany (+10%)(Domestic + flows with Spain, Italy and Greece).
- Increase for Ryanair (+26%)(flows Portugal-UK) and Air France (+10%)(domestic).
- Domestic traffic vs 2019: Europe (-63%), US (-29%), China (+6%), Middle-East (-44%).

Traffic Situation

Daily flights (including overflights)

Traffic over the last 7 days is

↓62%

Compared to equivalent days in 2019

Top 10 Aircraft Operators

on Wed 19 May 2021 (daily flights)

2. Operated 438 flights
↓66% of same day in 2019
↑10% over 2 weeks

3. Operated 364 flights
↓85% of same day in 2019
↑26% over 2 weeks

1. Operated 648 flights
↓48% of same day in 2019
↑31% over 2 weeks

4. Operated 347 flights
↓14% of same day in 2019
↓1% over 2 weeks

5. Operated 346 flights
↓79% of same day in 2019
↑6% over 2 weeks

6. Operated 306 flights
↑16% of same day in 2019
↑2% over 2 weeks

7. Operated 306 flights
↓67% of same day in 2019
↓4% over 2 weeks

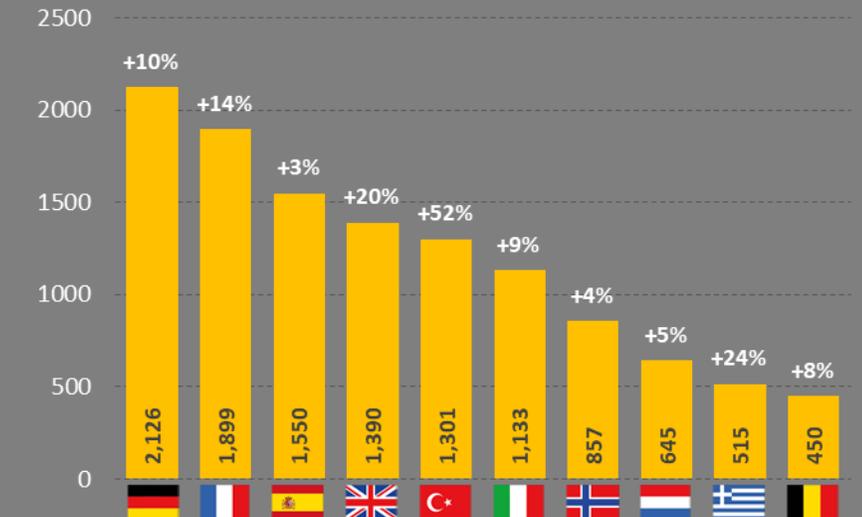
8. Operated 263 flights
↓35% of same day in 2019
↑186% over 2 weeks

9. Operated 188 flights
↓82% of same day in 2019
↑2% over 2 weeks

10. Operated 173 flights
↓23% of same day in 2019
↑9% over 2 weeks

Top 10 Busiest States

on Wed 19 May 2021
(Dep/Arr flights and variation over 2 weeks)



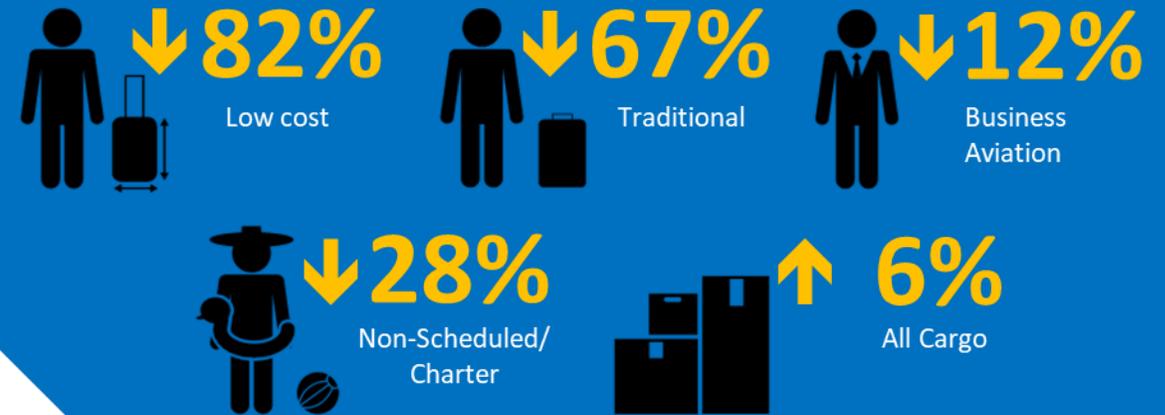
Top 10 Busiest Airports

7-day average Dep/Arr flights on 13-19 May, compared to 2019

Top 10 Airports	Average flights per day (week 13-19/5)	Average flights per day (week 13-19/5) vs 2019
Frankfurt	535	-64%
Amsterdam	518	-65%
IGA Istanbul Airport	500	-56%
Paris/Charles-De-Gaulle	491	-65%
Madrid/Barajas	448	-63%
London/Heathrow	358	-73%
Athens	315	-50%
Barcelona	303	-69%
Palma De Mallorca	302	-59%
Istanbul/Sabiha Gokcen	295	-48%

Market Segments

On 19 May, compared to 2019



Traffic Flow

On 19 May, the **intra-European** traffic flow was



Economics

(14 May 2021)

Fuel price



Source: IATA/Platts

Route charges

(April 2021)

Amount billed:

€ 205 million

Jan-Apr 2021 amount billed:

€ 746 million

vs. Jan-Apr 2019

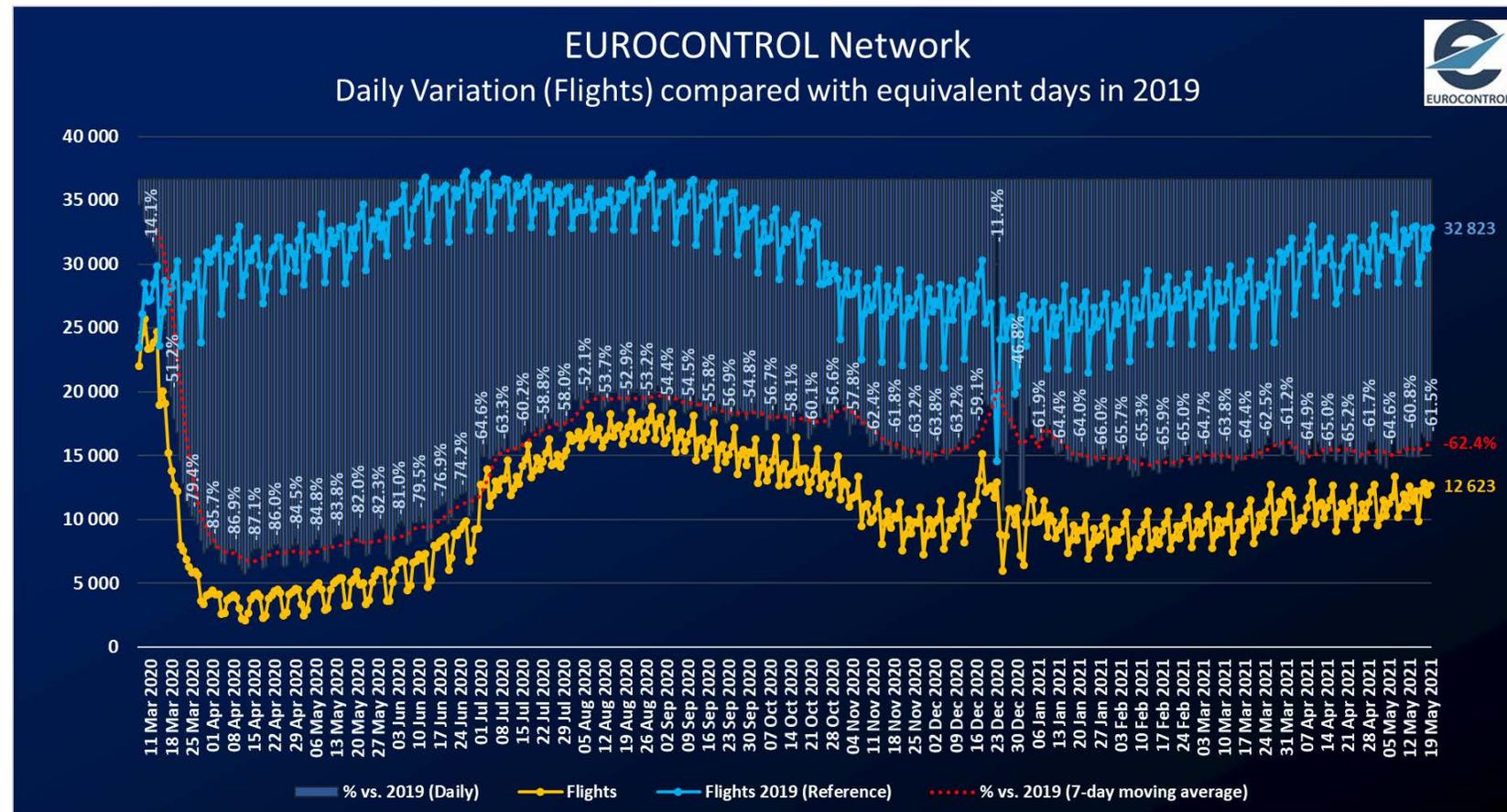


Source: EUROCONTROL

Overall traffic situation at network level



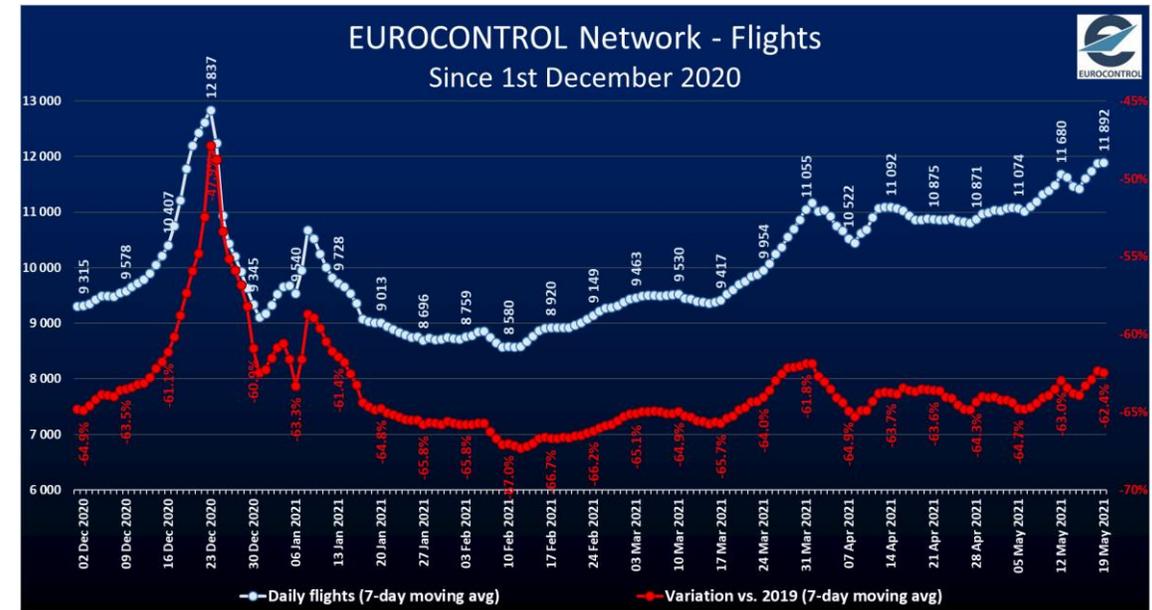
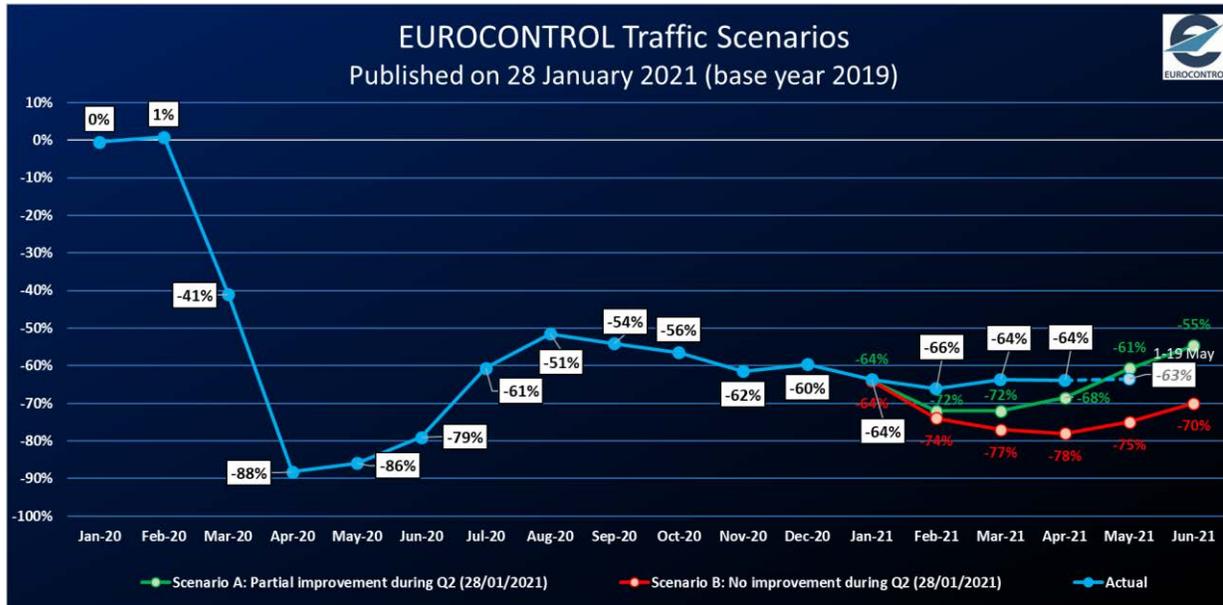
- ✘ **12,623 flights** on Wednesday 19 May.
- ✘ **Significant increase (+12%)** with **+1399 flights** over 2 weeks (from Wed 5 May).
- ✘ **Stabilization (+0%)** with **+36 flights** over 1 week (from Wed 12 May).
- ✘ **38%** of 2019 traffic levels on Wednesday 19 May.



Current situation and scenarios



✘ Traffic at -63% on 1-19 May 2021 vs 1-19 May 2019, slightly below the latest EUROCONTROL traffic scenarios for May published on 28 January 2021.

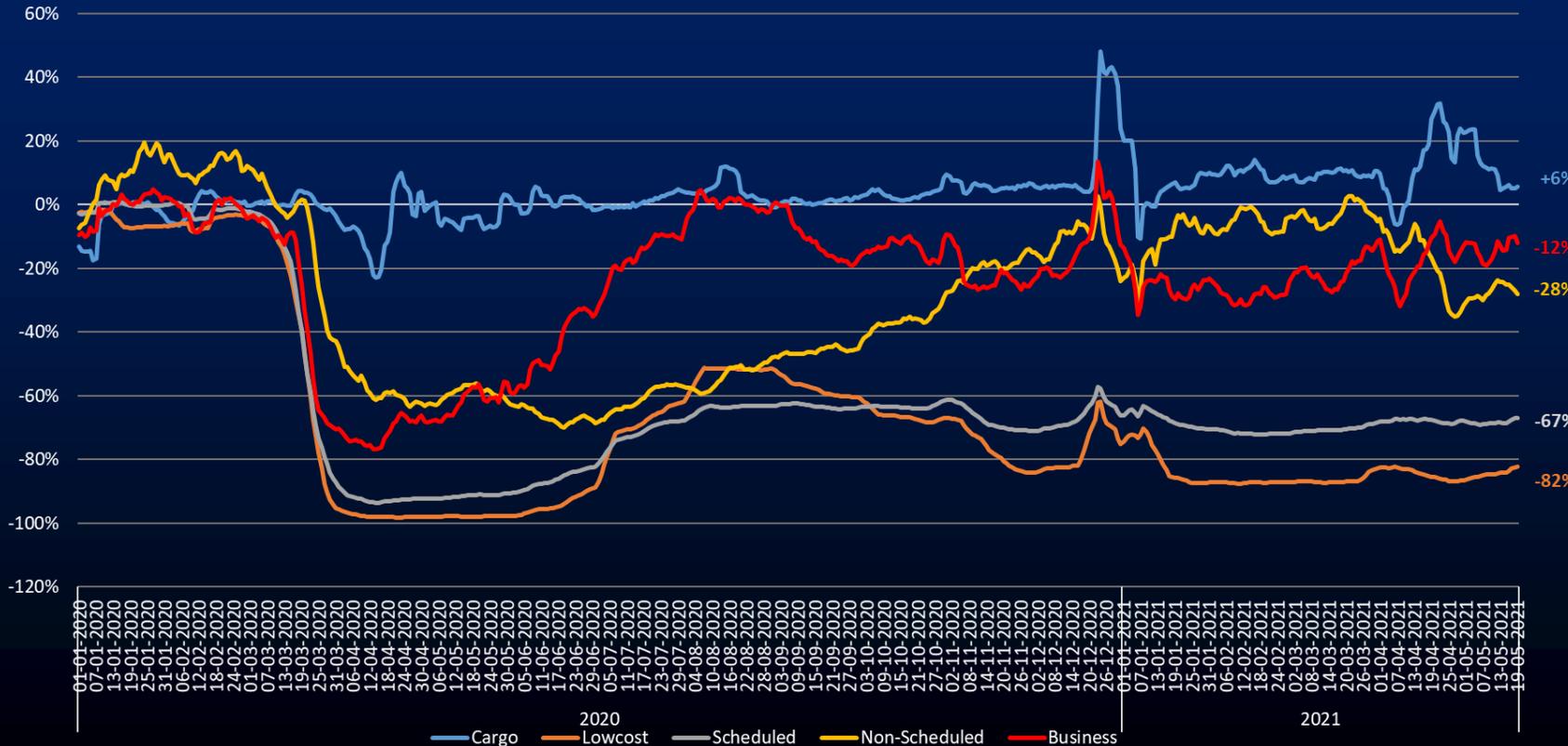


✘ When excluding the Easter period, where traffic reached a maximum at network level, the traffic has been relatively stable at -64% since January but is now starting to increase over the last 2 weeks.

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 19 May 2021, compared to 2019:

- ✗ **All-cargo** is the only segment above 2019 levels with **+6%**..
- ✗ **Biz Aviation** decreased to **-12%**.
- ✗ **Charter** decreased to **-28%**.
- ✗ **Traditional** remained very stable, declining by **-67%**.
- ✗ **Low-Cost** remains the most affected segment decreasing by **-82%** vs 2019 but is showing an increase over the last 2 weeks.

Aircraft operators (Daily flights)

Top 10



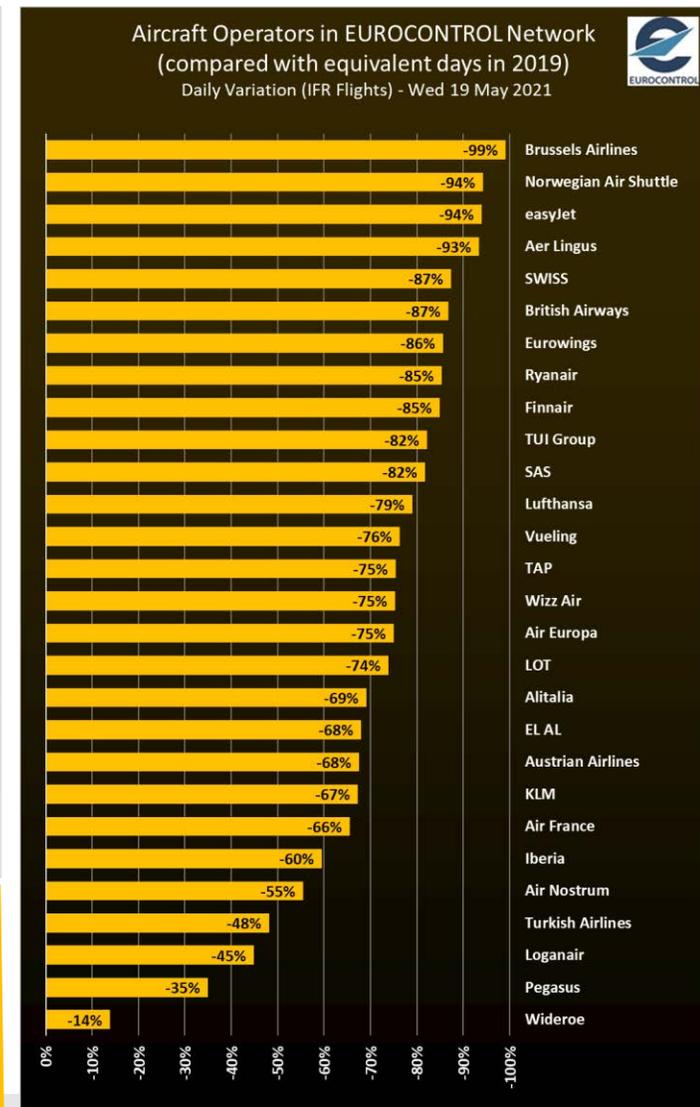
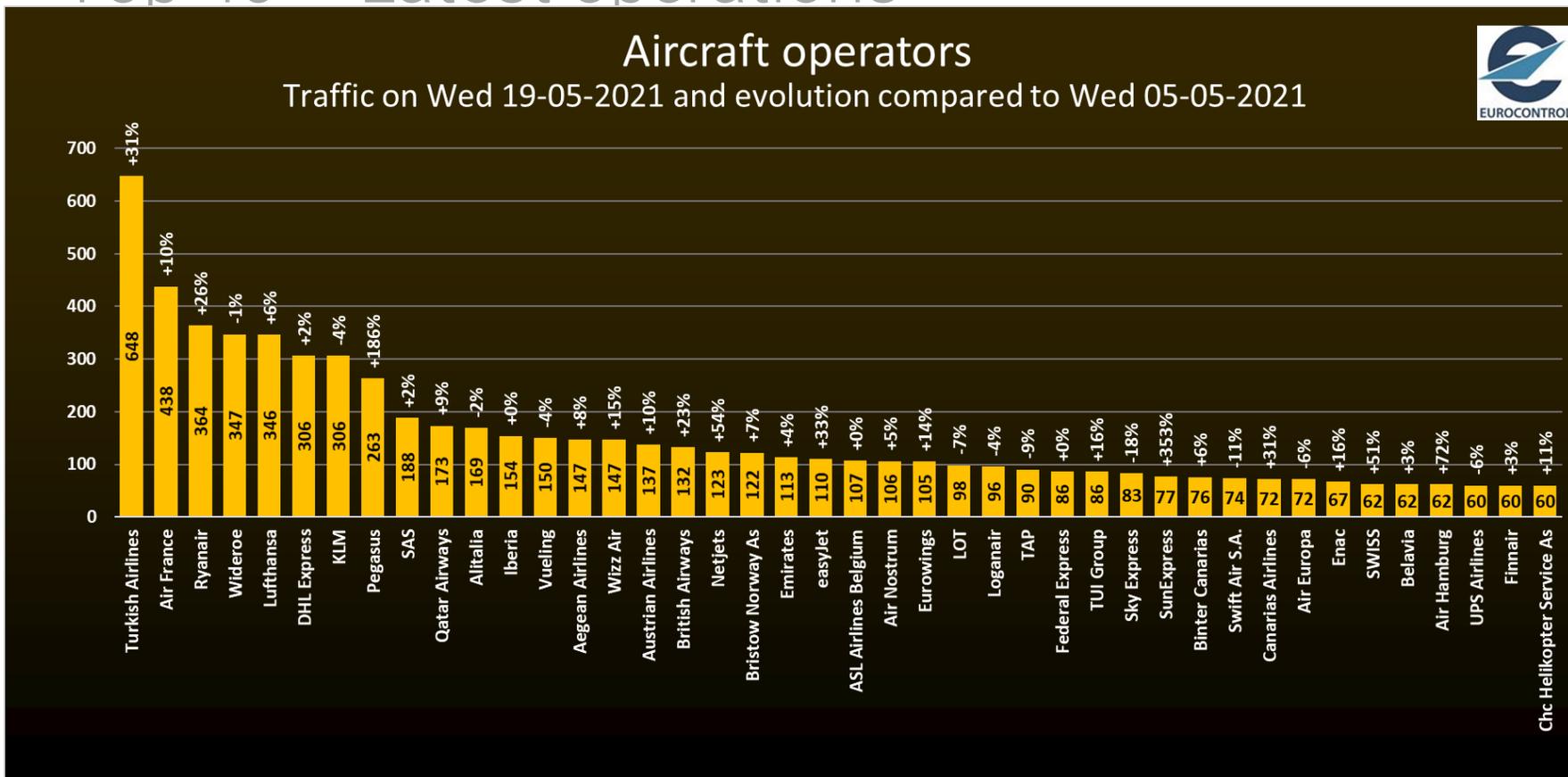
Top 10 Aircraft Operators on Wed 19-05-2021

Rank evolution over 2 weeks	Aircraft Operator	Flights	Δ over 2 weeks	% over 2 weeks	% vs 2019
→	Turkish Airlines	648	➔ +155	+31%	➔ -48%
→	Air France	438	➔ +40	+10%	➔ -66%
➔	Ryanair	364	➔ +74	+26%	➔ -85%
➔	Wideroe	347	➔ -3	-1%	➔ -14%
➔	Lufthansa	346	➔ +19	+6%	➔ -79%
→	DHL Express	306	➔ +7	+2%	➔ +16%
➔	KLM	306	➔ -12	-4%	➔ -67%
➔	Pegasus	263	➔ +171	+186%	➔ -35%
➔	SAS	188	➔ +3	+2%	➔ -82%
→	Qatar Airways	173	➔ +14	+9%	➔ -23%

- ✘ **Turkish Airlines** is the busiest airlines with 648 flights.
- ✘ Positive change in the ranking over 2 weeks for **Ryanair** and **Pegasus**.
- ✘ Highest increase over 2 weeks for:
 - **Turkish Airlines** (+31%) and **Pegasus** (+186%) driven by domestic flows, after relaxation of the Turkish lockdown.
 - **Ryanair** (+26%) mainly driven by the flow Portugal-UK.
 - **Air France** (+10%) mainly driven by domestic flows.

Aircraft operators (Daily flights)

Top 40 – Latest operations



- ✘ Highest increase for **Pegasus, Turkish Airlines, Ryanair, SunExpress** (+353%; Turkey-Turkey and Germany-Turkey), **NetJets** (+54%; many flows) and **Air France**.
- ✘ Ryanair 3rd, Wizz Air 15th, British Airways 17th and easyJet 21st.
- ✘ Traffic levels ranging from -99% (Brussels Airl.) to -14% (Wideroe) compared to 2019.

Aircraft operators

Latest news



European airlines

- ✘ **Air France-KLM** reports a net loss for Q1 2021 of €1.5 billion, with employee costs down 39% year-on-year; CFO states that there is little risk of a cash crisis unless the summer season is “catastrophic”; warns that a mandated SAF requirement for European airlines could give other carriers an unfair advantage.
- ✘ **easyjet** launches a coronavirus Travel hub on its website detailing latest travel restrictions/requirements for travellers across Europe.
- ✘ **Eurowings** reports strong holiday demand from German travellers, with around 50,000 booking per day.
- ✘ **Finnair** April passenger numbers down 93% on April 2019, RPKs down 97%.
- ✘ **IAG** reports net loss of €1.1 billion in Q1 2021 despite employee costs being €612 million lower year-on-year.
- ✘ **Lufthansa Cargo** lays the foundation stone for a new storage facility at Frankfurt, specifically designed for handling works of art.

- ✘ **Norwegian** receives Irish and Norwegian court approval for the exit of the examinership/reconstruction processes.
- ✘ **Ryanair** plans to open a new base at Stockholm Arlanda for the winter season; reports net loss of €1 billion for year to end March 2021.
- ✘ **SAS** reports April passenger numbers of 319,000, 85% lower than in April 2019, and a load factor of 30.4%.
- ✘ **SWISS** announces that, compared to 2019, its fleet will be downsized by a projected 15% and that its workforce will be around 1700 lower than in 2019 (>20%); projects that it will be profitable at 50% of 2019 levels.
- ✘ **Turkish Airlines** reports 2.4 million passengers in April, 59% lower than in April 2019 (domestic -57%, international -61%) with a load factor of 58.5%; net profit for Q1 2021 of \$61 million.
- ✘ **Wizz Air** reports April passenger numbers down 82.8% on April 2019, with a load factor of 59.2%; to establish base at Rome Fiumicino in July.

Aircraft operators

Latest news

Worldwide airlines

- ✘ **Air Canada** reports net loss of C\$1.3 billion in Q1 2021.
- ✘ **Air Seychelles** offers \$20 million to settle \$71.5 million debt with bondholders.
- ✘ **Asiana** conducting seven charter services in March for the repatriation of South Korean nationals from India.
- ✘ **Cathay Pacific** raises \$650 million from senior unsecured bonds (5.25 years, priced at 4.875%); reports 22,404 passengers in April (down from 3.1 million in April 2019).
- ✘ **Emirates Airlines** using A380 aircraft daily on its Dubai-Frankfurt service; retrofitting three more A380 premium economy upgrades.

- ✘ **Emirates SkyCargo** reports operating over 3,100 flights with 11,000 tonnes of cargo loaded in the passenger area of 777-300ER aircraft during the last year.
- ✘ **Gulf Air** announces that it is now operating all flights with fully vaccinated crew.
- ✘ **Qantas** moves back the planned resumption of international services from late October to the end of December, with international borders not expected to significantly reopen until mid 2022.



States (Daily Departure/Arrival flights)

Top 10



Top 10 States on Wed 19-05-2021



Rank evolution over 2 weeks	State	Flights (Dep/Arr)	Δ over 2 weeks	% over 2 weeks	% vs 2019
→	Germany	2126	↗ +198	+10%	↘ -67%
→	France	1899	↗ +239	+14%	↘ -60%
→	Spain	1550	↗ +44	+3%	↘ -67%
→	United Kingdom	1390	↗ +228	+20%	↘ -79%
↗	Turkey	1301	↗ +443	+52%	↘ -52%
↘	Italy	1133	↗ +90	+9%	↘ -71%
→	Norway	857	↗ +31	+4%	↘ -50%
→	Netherlands	645	↗ +33	+5%	↘ -65%
↗	Greece	515	↗ +99	+24%	↘ -62%
↘	Belgium	450	↗ +33	+8%	↘ -58%

✦ Highest increases over 2 weeks:

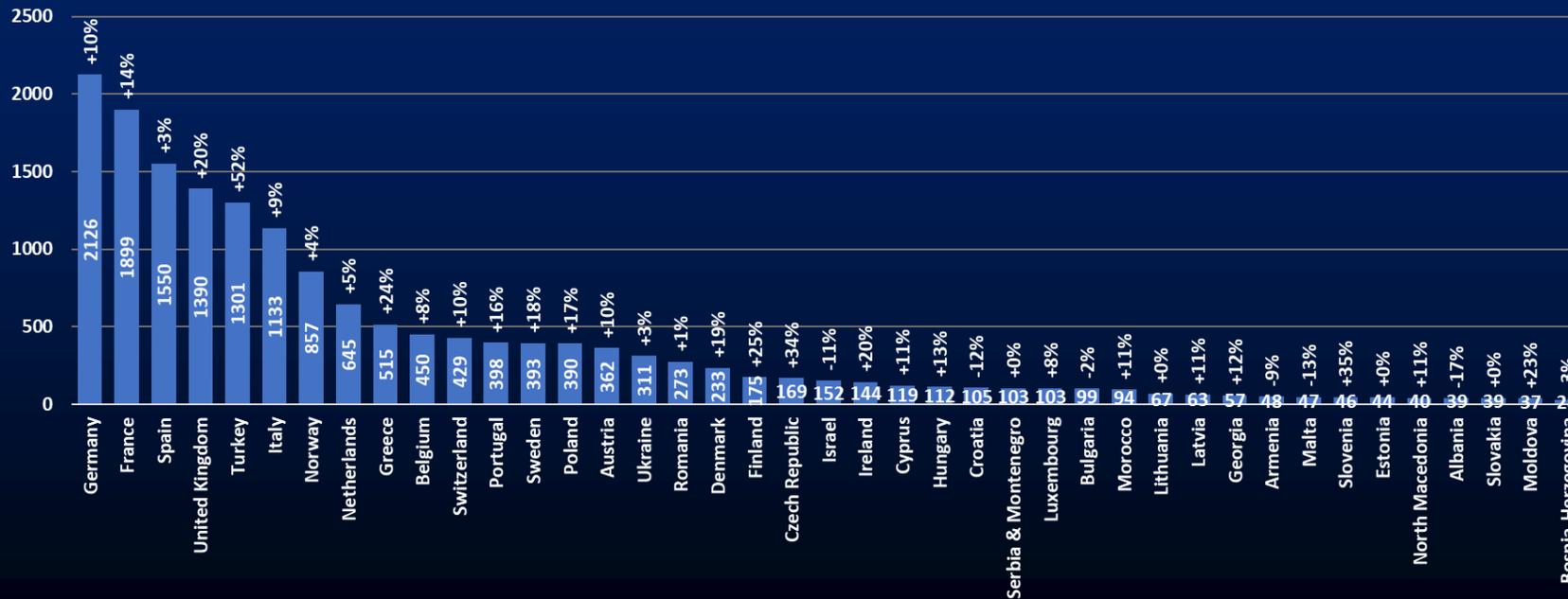
- **Turkey (+52%)** driven by Pegasus, Turkish Airlines and SunExpress. Domestic flows, after relaxation of lockdown.
- **France (+14%)** driven by light AOs and Air France. Domestic flows.
- **UK (+20%)** mainly driven by light aircraft operators, EasyJet, Ryanair and BA. Domestic flows as well as with Portugal and Greece.
- **Germany (+10%)** mainly driven by light aircraft, Lufthansa and Eurowings. Domestic flows + with Spain, Italy and Greece.
- **Greece (+24%)** mainly driven by light aircraft and Olympic. Flows with UK, Germany and France.

States (Daily Departure/Arrival flights)

Latest traffic situation



States (Dep/Arr flights)
Traffic on Wed 19-05-2021 and evolution compared to Wed 05-05-2021



- ✘ Highest increases for **Turkey (+52%)**, **France (+14%)**, **UK (+20%)** and **Germany (+10%)**.
- ✘ Traffic levels ranging from **-84% (Ireland)** to **-6% (Armenia)** compared to 2019.

States in EUROCONTROL Network
(compared with equivalent days in 2019)
Daily Variation (IFR Dep/Arr Flights) - Wed 19 May 2021



Industry, States & Associations



✘ **Airbus** plans to increase A320 output, to up to 53 aircraft a month, by the end of 2022.

✘ **Aruba** launches a health app using blockchain technology for sharing of health status.

✘ **Israel** reports 30,200 April visitor arrivals, a decline of 92.5% compared to April 2019.

✘ **UAE** establishes safe travel corridors for vaccinated passengers with Greece, with Serbia and with the Seychelles.

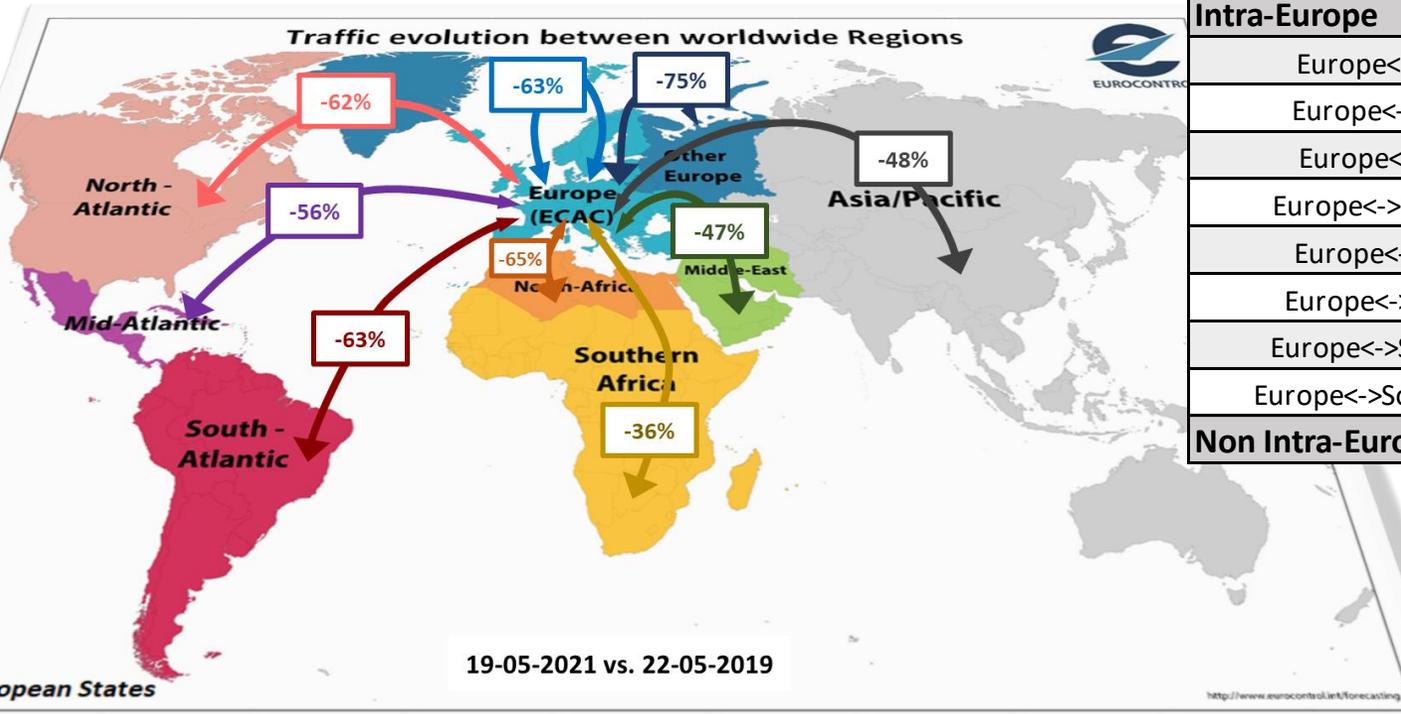
✘ **UK** announces only 12 countries on its 'green list' many of which are either very small or do not accept UK passengers; does not reduce restrictions for those vaccinated.

✘ **IATA** CEO Willie Walsh says that the cost of testing should be borne by governments so that it does not discourage travelling.

Traffic flows (Daily Departure/Arrival flights)



- ✘ The main traffic flow is the intra-Europe flow with 9,782 flights on Wednesday 19 May, which is increasing (+16%) over 2 weeks.
- ✘ Intra-Europe flights are at -63% compared to 2019 while intercontinental flows are at -59%.



REGION	05-05-2021	19-05-2021	%	vs. 2019
Intra-Europe	8 449	9 782	+16%	-63%
Europe<->Asia/Pacific	392	394	+1%	-48%
Europe<->Mid-Atlantic	73	62	-15%	-56%
Europe<->Middle-East	566	614	+8%	-47%
Europe<->North Atlantic	469	474	+1%	-62%
Europe<->North-Africa	222	249	+12%	-65%
Europe<->Other Europe	300	286	-5%	-75%
Europe<->South-Atlantic	68	65	-4%	-63%
Europe<->Southern Africa	157	175	+11%	-36%
Non Intra-Europe	2 247	2 319	+3%	-59%

Country pairs (Daily Departure/Arrival flights)

Top 10



Rank evolution over 2 weeks	Top 10 Country-Pair on Wed 19-05-2021				
	Country-Pair	Dep/Arr Flights	Δ over 2 week	% over 2 week	% vs 2019
→	France <-> France	856	↗ +116	+16%	↘ -40%
↗	Norway <-> Norway	707	↗ +53	+8%	↘ -29%
↘	Spain <-> Spain	707	↘ -14	-2%	↘ -44%
↗	Turkey <-> Turkey	569	↗ +375	+193%	↘ -36%
→	Germany <-> Germany	474	↗ +67	+16%	↘ -60%
↘	Italy <-> Italy	473	↗ +30	+7%	↘ -45%
↘	United Kingdom <-> United Kingdo	454	↗ +61	+16%	↘ -62%
↘	Greece <-> Greece	244	↗ +5	+2%	↘ -24%
↗	Sweden <-> Sweden	204	↗ +53	+35%	↘ -62%
↘	Germany <-> Spain	191	↗ +29	+18%	↘ -67%

- ✘ 9 of the top 10 flows are domestic.
- ✘ Highest **increases** in flights over 2 weeks for domestic flows in
 - **Turkey (+193%)** mainly due to Pegasus, Turkish Airlines and SunExpress.
 - **France (+16%)** due to light aircraft, Air France, Jetfly Av.
 - **Germany (+16%)** due to light aircraft.
 - **UK (+16%)** due to light aircraft.

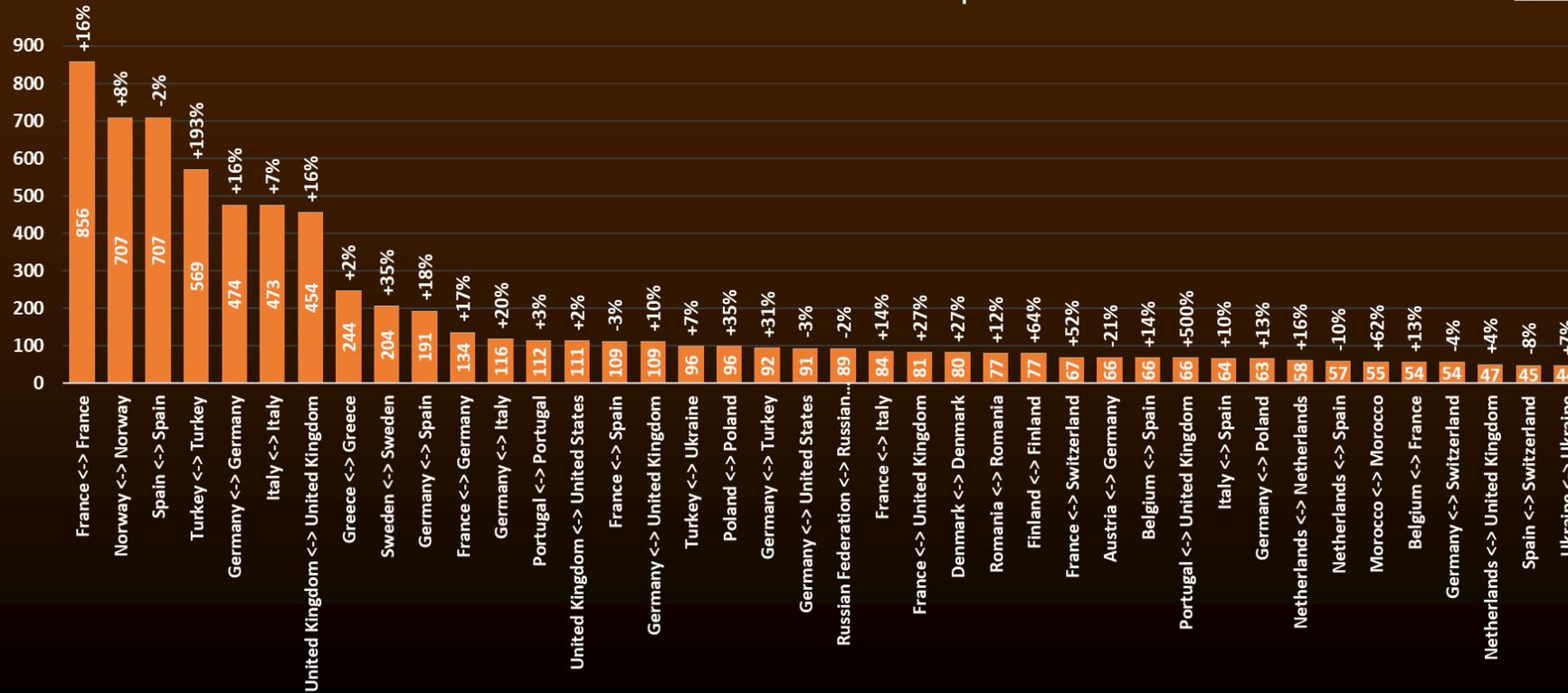
Country pairs (Daily Departure/Arrival flights)

Latest traffic situation



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

Traffic on Wed 19-05-2021 and evolution compared to Wed 05-05-2021



✘ The busiest non-domestic flows were:

- **Germany-Spain** (191 flights, +18% over 2 weeks).
- **France-Germany** (134, +17%)
- **Germany-Italy** (116, +20%).
- **UK-US** (111, +2%).
- **France-Spain** (109, -3%).
- **Germany-UK** (109,+10%).

Outside Europe

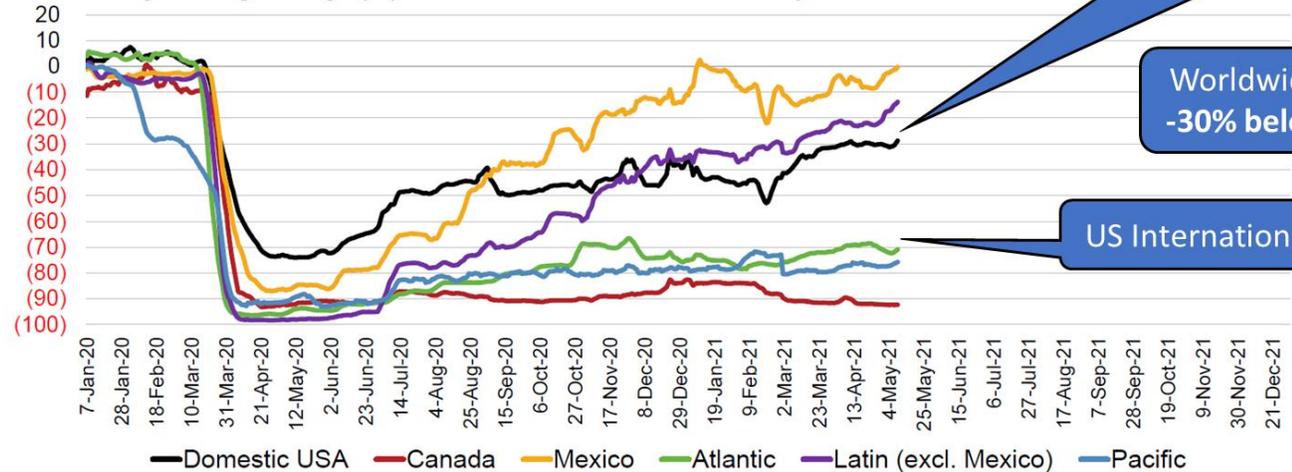


USA

- ✘ Bookings are improving but demand for corporate and long-haul international air travel are lagging, so revenues remain well below 2019 levels and industry cash burn continues.
- ✘ On 18 May, US passenger airline departures were 30% below 2019 levels with domestic down 29% and international down 41%.
- ✘ The domestic US load factor has improved recently, averaging at 77% on 18 May vs 85% in same week of 2019.

In Most Recent Week, U.S. Passenger Airline Departures Were 30% Below Pre-Pandemic Levels
 Domestic Flights Operated Down 29%, International Flights Operated Down 41%

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

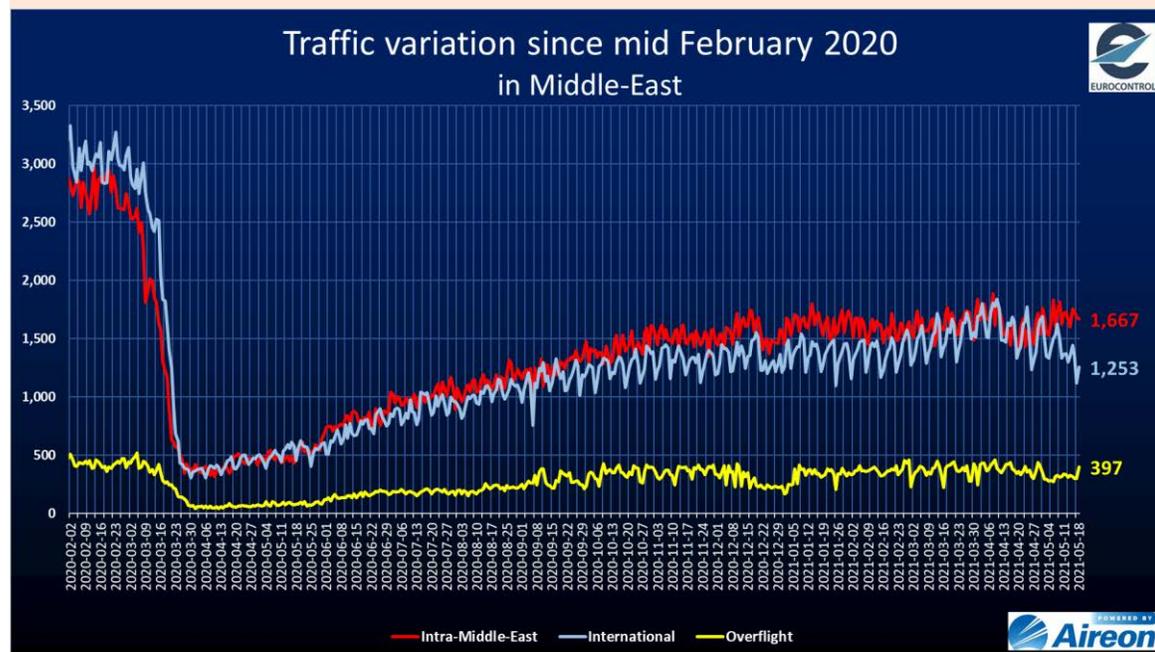


Outside Europe



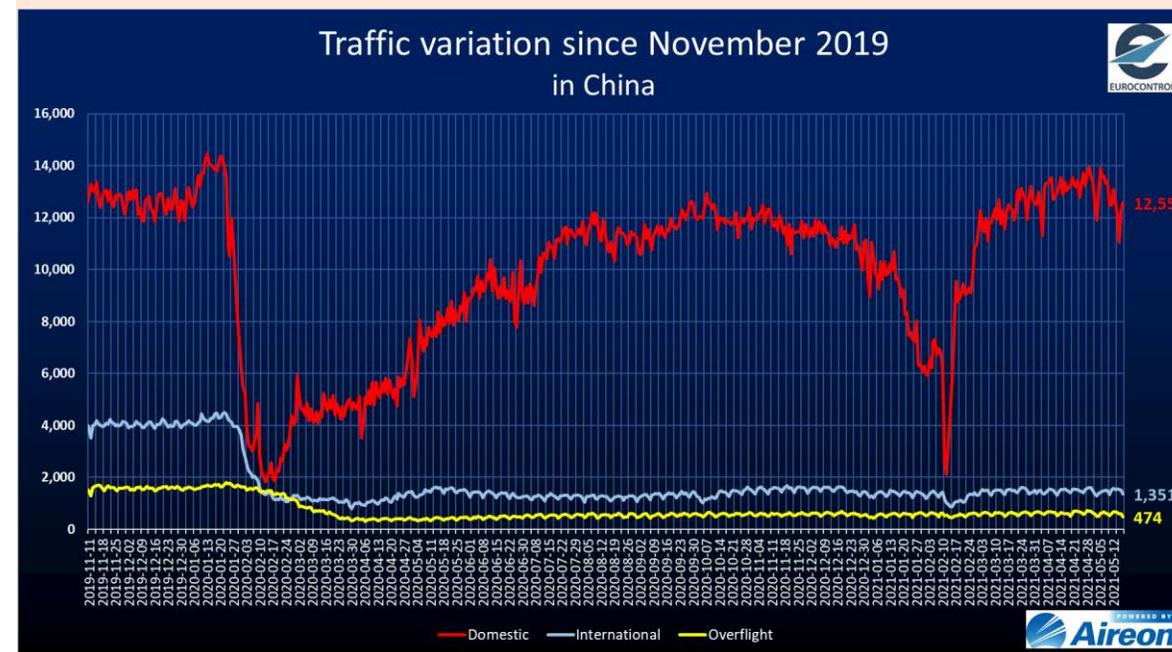
Middle East

- ✂ On 18 May, Intra-Middle-East traffic recorded 1,667 daily flights (-44% compared to Feb 2020).
- ✂ International traffic from and to Middle-East recorded 1,253 flights (-55% compared to Feb 2020).
- ✂ Overflights have remained stable around 397 flights over the recent weeks (-18% compared to Feb 2019).



China

- ✂ On 17 May, domestic traffic recorded 12,556 flights (+6% compared to January 2020 levels).
- ✂ International flights and overflights are still suppressed, they were stable on previous weeks with 1,351 and 474 flights respectively (-67% and -70% vs 1 Jan 2020).



Airports (Daily Departure/Arrival flights)

Top 10 and latest news



Rank evolution over 2 weeks	Top 10 Airports on Wed 19-05-2021				
	Airport	Dep/Arr Flights	Δ over 2 weeks	% over 2 weeks	% vs 2019
↗	IGA Istanbul Airport	540	↗ +93	+21%	↘ -52%
↘	Paris/Charles-De-Gaulle	501	↗ +16	+3%	↘ -65%
→	Frankfurt	488	↗ +20	+4%	↘ -68%
↘	Amsterdam	483	↗ +2	+0%	↘ -68%
→	Madrid/Barajas	428	↘ -8	-2%	↘ -65%
→	London/Heathrow	355	↗ +29	+9%	↘ -74%
↗	Istanbul/Sabiha Gokcen	351	↗ +200	+132%	↘ -37%
↘	Athens	316	↗ +25	+9%	↘ -50%
↘	Barcelona	273	↗ +4	+1%	↘ -73%
↗	Vienna	272	↗ +42	+18%	↘ -68%

✘ Positive developments for the almost all top 10 airports.

✘ Highest increases for:

- **Istanbul/Sabiha (+132%)** mainly due to Vueling and Ryanair as well as domestic flows.
- **IGA Istanbul Airport (+21%)** mainly due to SkyExpress, Olympic and Aegean as well as domestic flows.

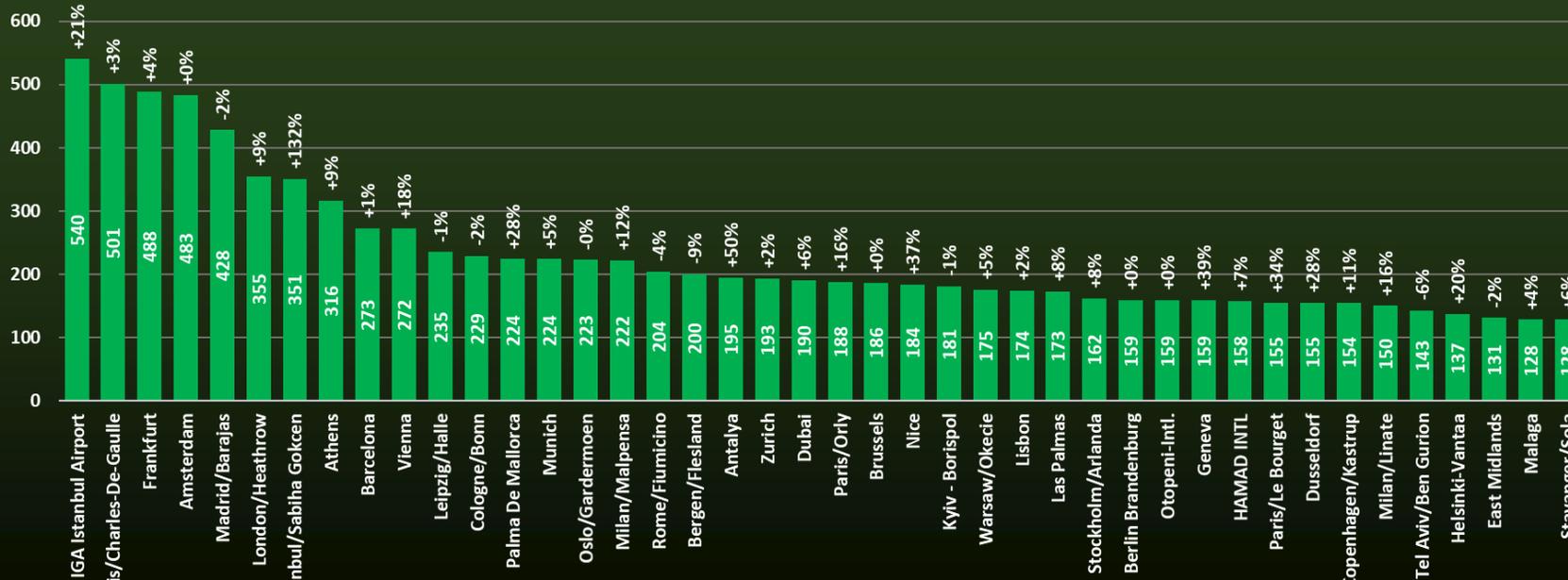
Airports (Daily Departure/Arrival flights)

Latest operations



Top 40 Airports (Dep/Arr flights)

Traffic on Wed 19-05-2021 and evolution compared to Wed 05-05-2021



✂ Largest increases for **Istanbul/Sabiha (+132%)**, **IGA Istanbul (21%)**, **Izmir (+429%)**, **Antalya (+50%)** and **Ankara (+90%)**.

✂ Traffic levels ranging from **-96% (Gatwick)** to **-50% (Athens)** compared to 2019.

Airports in EUROCONTROL Network (compared with equivalent days in 2019) Daily Variation (IFR Dep/Arr Flights) - Wed 19 May 2021



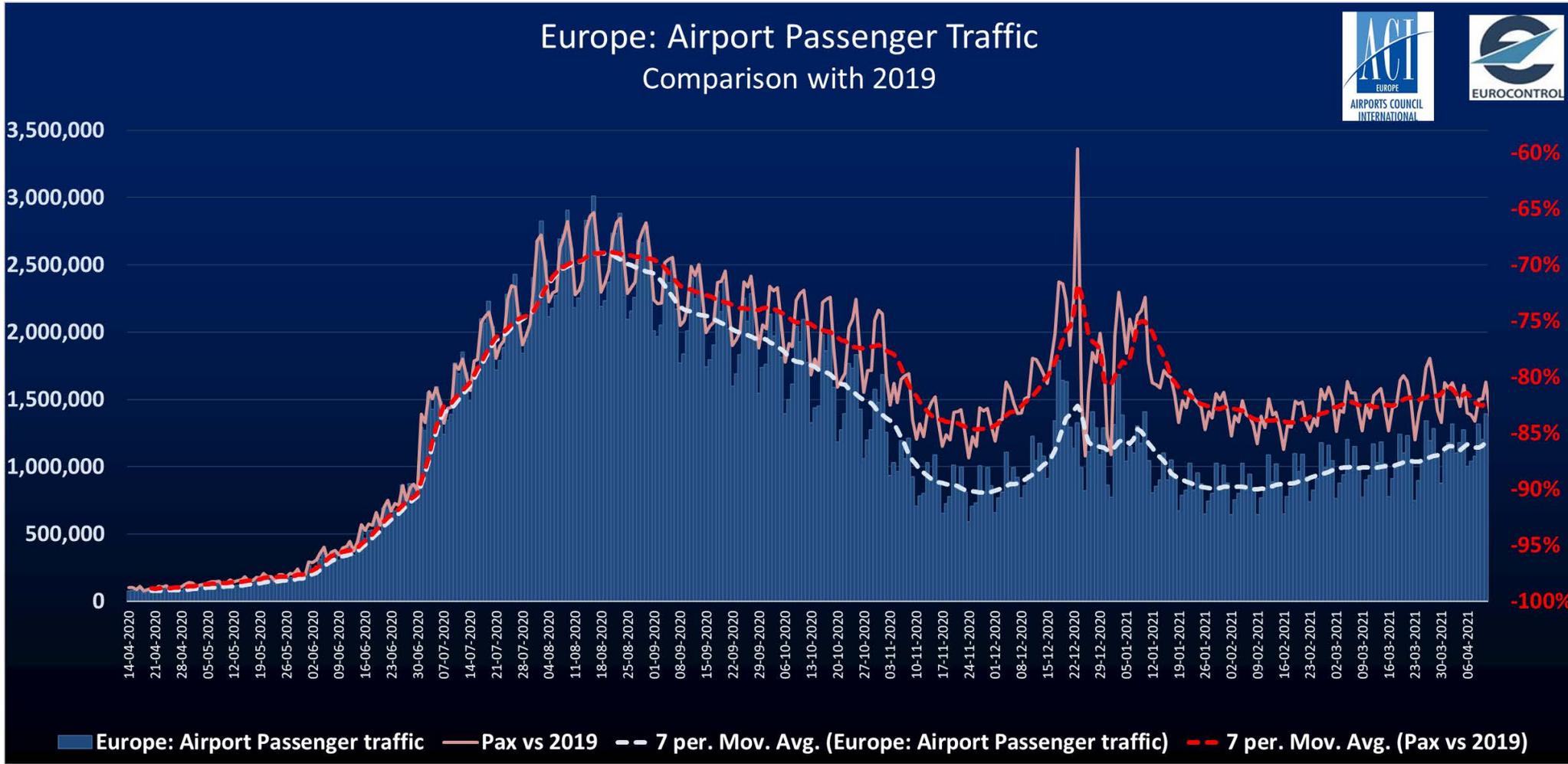
Airports

Latest news



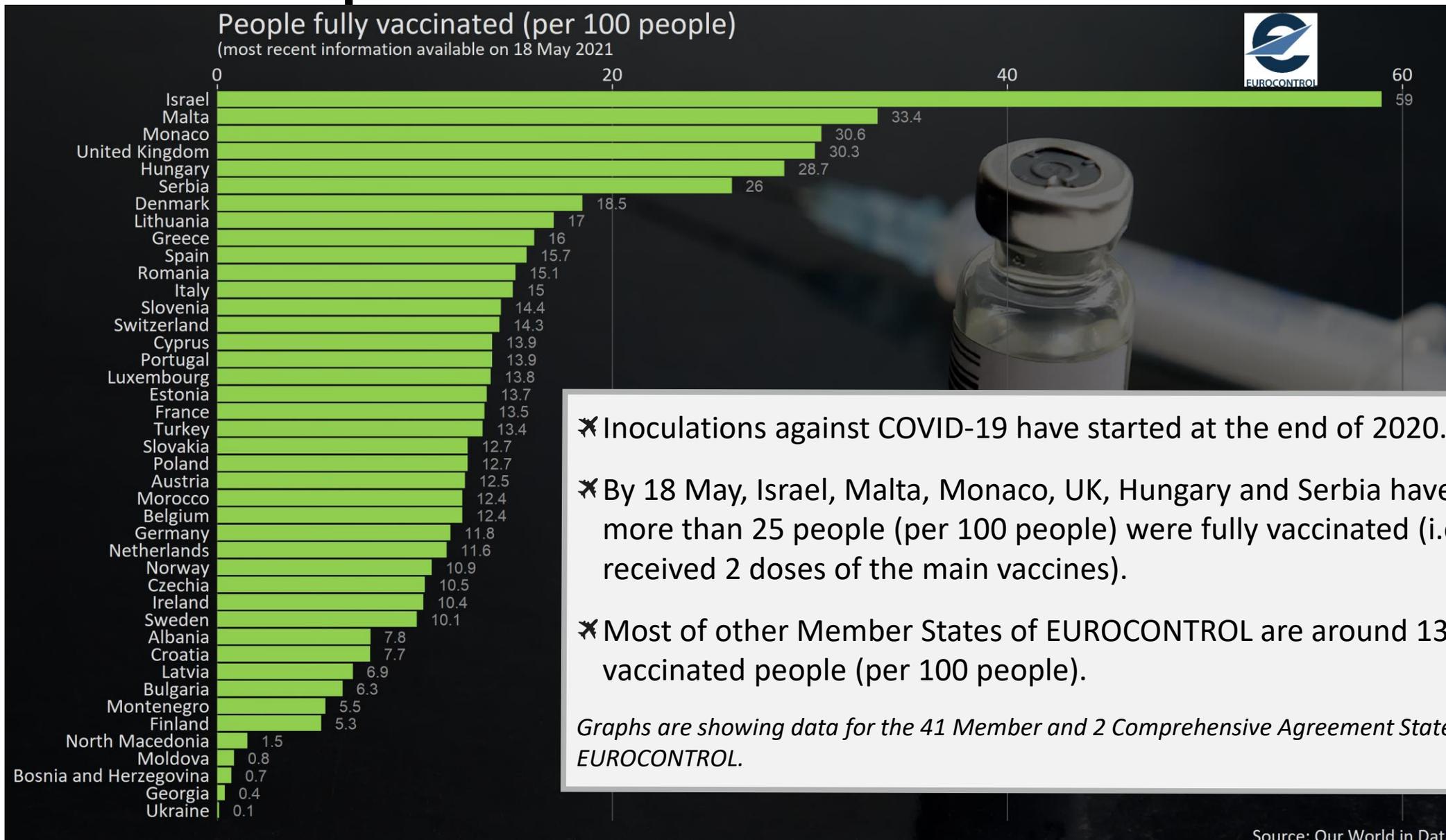
- ✘ **Aeroporti di Roma** reports a net loss of €143 million for 2020 but an end-of-year liquidity position of €1.1 billion – enough to cover commitments until the end of 2022.
- ✘ **Amsterdam Schiphol Airport** reports April passenger number down 87.1% on 2019 (Europe -87.6%, intercontinental -86.0%).
- ✘ **Avinor** reports April passenger numbers down 80.5% on 2019 (domestic -70.1%, international -96.3%).
- ✘ **Delhi Airport** to suspend Terminal 2 operations until further notice.
- ✘ **Finavia** reports April passenger numbers down 92.8% on 2019 (domestic -84.3%, international -95.3%).
- ✘ **Fraport** raises a net loss of €77.5 million for Q1 and €1.9 billion in financing in Q1, reports personnel costs €250 million p/a lower than in 2019, achieved by cutting about 4,000 jobs – 3,900 at Frankfurt alone.
- ✘ **Heathrow Airport** says that Terminal 3 will not be reopened before 24 May; reports April passenger numbers were 92.1% down on 2019.
- ✘ **Munich Airport** reports a net loss of €320 million for 2020 after having made savings of €530 million; to open SAF compatible depot in June.
- ✘ **Singapore Airport** reports 35 airport workers testing positive despite 90% of frontline workers already vaccinated; more measures being taken.
- ✘ **Swedavia** reports April passenger numbers down 88.6% on 2019 (domestic -83.8%, international -90.8%).

Passengers



✖ **ACI** recorded just below **1.18 million passengers** on 30 April 2021, a **loss of 5.3 million** compared to the equivalent day in 2019 (i.e. **-82%**).

Vaccination updates

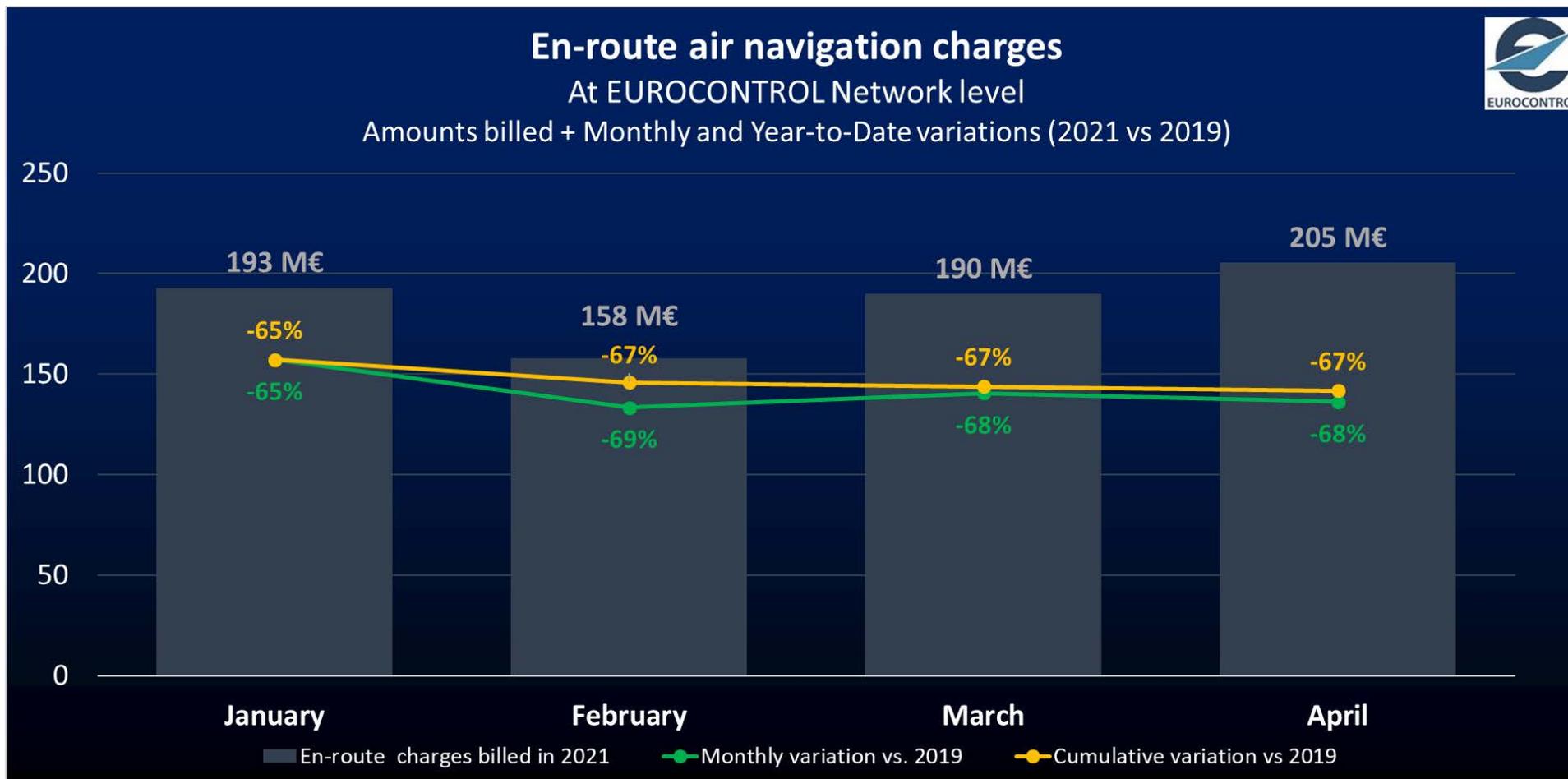


- ✘ Inoculations against COVID-19 have started at the end of 2020.
- ✘ By 18 May, Israel, Malta, Monaco, UK, Hungary and Serbia have reported that more than 25 people (per 100 people) were fully vaccinated (i.e. have received 2 doses of the main vaccines).
- ✘ Most of other Member States of EUROCONTROL are around 13 fully vaccinated people (per 100 people).

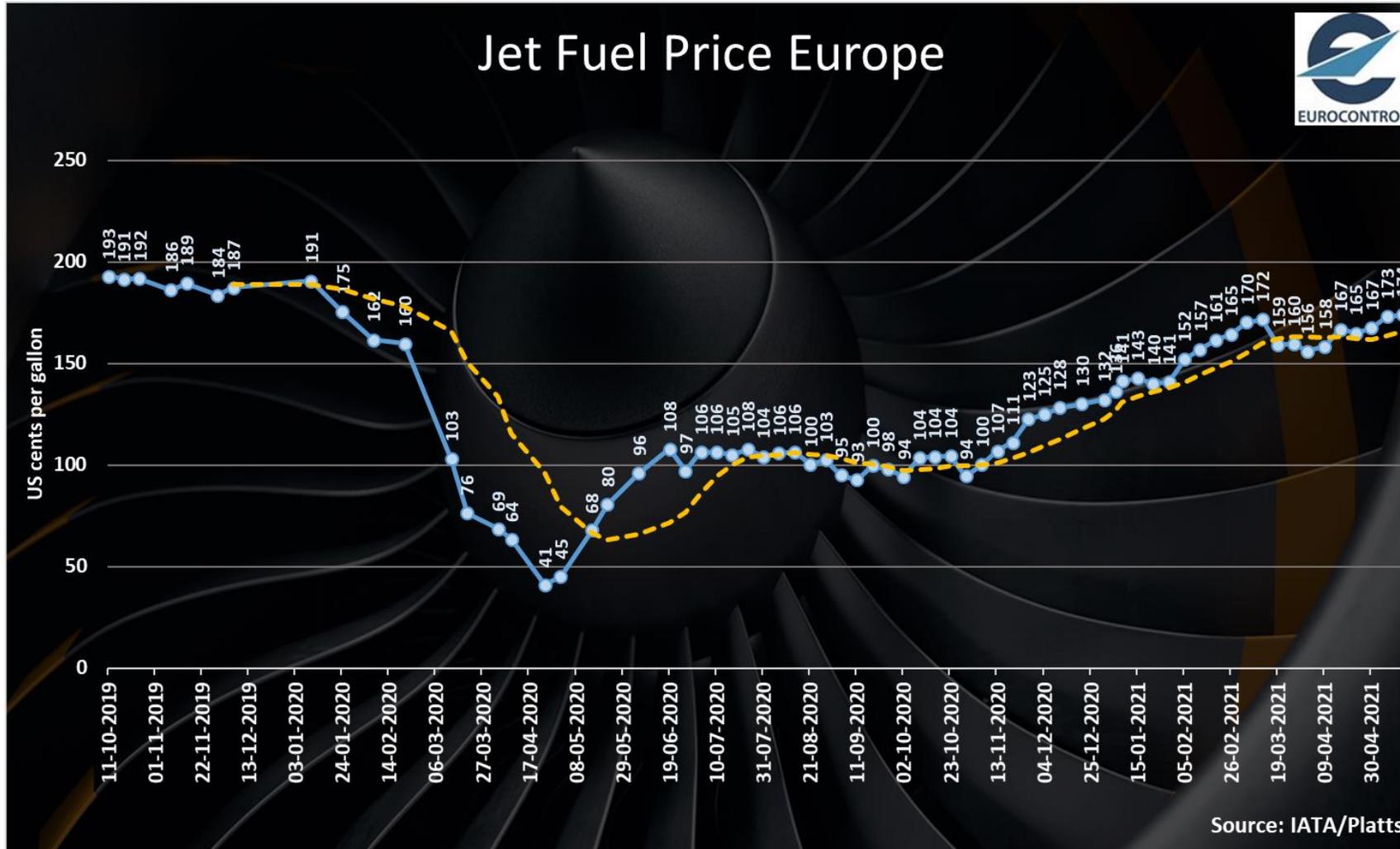
Graphs are showing data for the 41 Member and 2 Comprehensive Agreement States of EUROCONTROL.

Source: Our World in Data

En-Route Air Navigation charges



- ✘ **EUROCONTROL** has just billed **205M€** of en-route charges for April flights.
- ✘ This is **-68%** below the amount billed for the April 2019 flights.
- ✘ On a year-to-date basis, we are at **-67% vs 2019**



- ✖ Jet fuel prices have started to rise since last Autumn, from around 100 cts/gal in October 2020 to 174 cts/gal on 14 May 2021, their highest levels in 2021.
- ✖ The jet fuel prices are around 20 cents per gallon below pre-COVID levels.

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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