

10 June 2021



# COVID 19 **IMPACT ON** EUROPEAN AVIATION

EUROCONTROL  
Comprehensive Assessment



SUPPORTING EUROPEAN AVIATION



NETWORK  
MANAGER



# Headlines

- 15,580 flights (44% of 2019 levels) on Wed 9 June 2021, increase (+17%) over 2 weeks.
- High traffic increase (2-digit) as of 1<sup>st</sup> June. Now stability over 1 week.
- Ryanair brought around 800 additional flights per day since 1<sup>st</sup> June (+174% over 2 weeks). Low costs airlines are coming back to the top 10 airlines.
- High increase for many States: Spain (+32%), Italy (+39%), Germany (+19%), France (+15%), Greece (+49%), UK (+17%) and Turkey (+15%).
- High increase for domestic flows and flows between Southern and Northern European States as well as for southern airports (Athens, Barcelona, Istanbul/Sabiha, Palma, Ibiza, Madrid).
- Domestic traffic vs 2019: Europe (-55%), US (-22%), China (-13%) (recent decline due to lockdown in the Guangzhou area), Middle-East (-38%).

## Top 10 Aircraft Operators on Wed 09 June 2021 (daily flights)



## Traffic Situation

Daily flights (including overflights)



Traffic over the last 7 days is

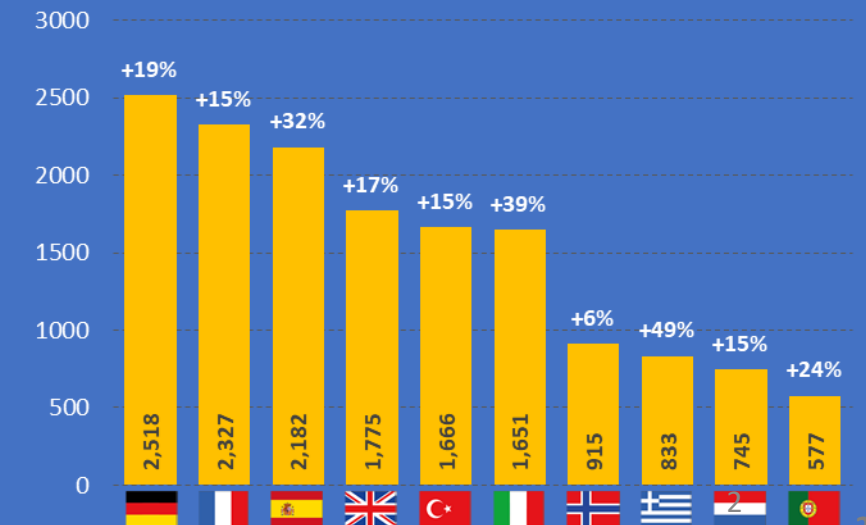
**↓54%**

Compared to equivalent days in 2019

## Top 10 Busiest States

on Wed 09 June 2021

(Dep/Arr flights and variation over 2 weeks)



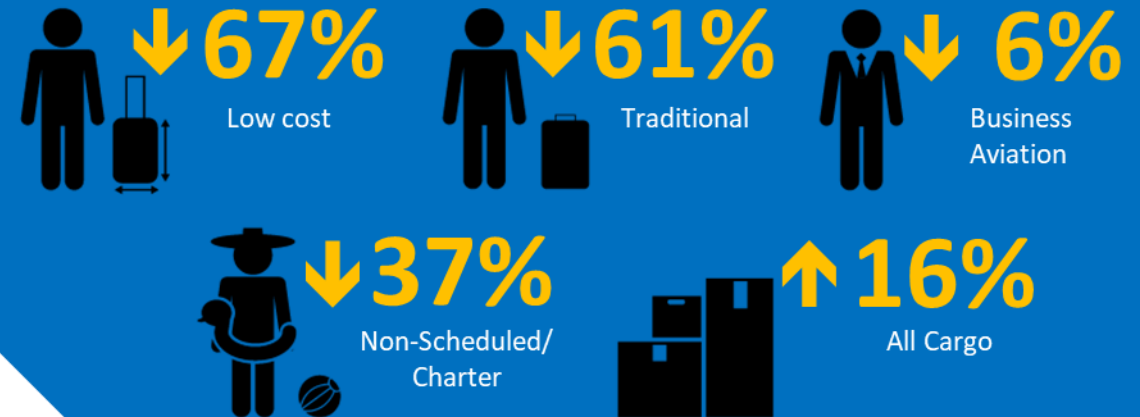
# Top 10 Busiest Airports

7-day average Dep/Arr flights on 3-9 June, compared to 2019

Top 10 Airports	Average flights per day (week 3-9/6)	Average flights per day (week 3-9/6) vs 2019
IGA Istanbul Airport	660	-47%
Frankfurt	634	-58%
Amsterdam	609	-59%
Paris/Charles-De-Gaulle	566	-61%
Madrid/Barajas	552	-55%
Istanbul/Sabiha Gokcen	511	-24%
Athens	467	-37%
London/Heathrow	444	-67%
Palma De Mallorca	431	-50%
Barcelona	387	-63%

## Market Segments

On 09 Jun, compared to 2019



## Traffic Flow

On 9 June, the **intra-European** traffic flow was

**12,509** flights **+ 21%** over past 2 weeks **-55%** Compared to 2019

## Economics

(04 June 2021)

Fuel price

**↑ 181**  
Cents/gallon

compared to 170 cents/gallon on 21 May 2021

Source: IATA/Platts

## Passengers

(23 May 2021)

**1.9 million** pax

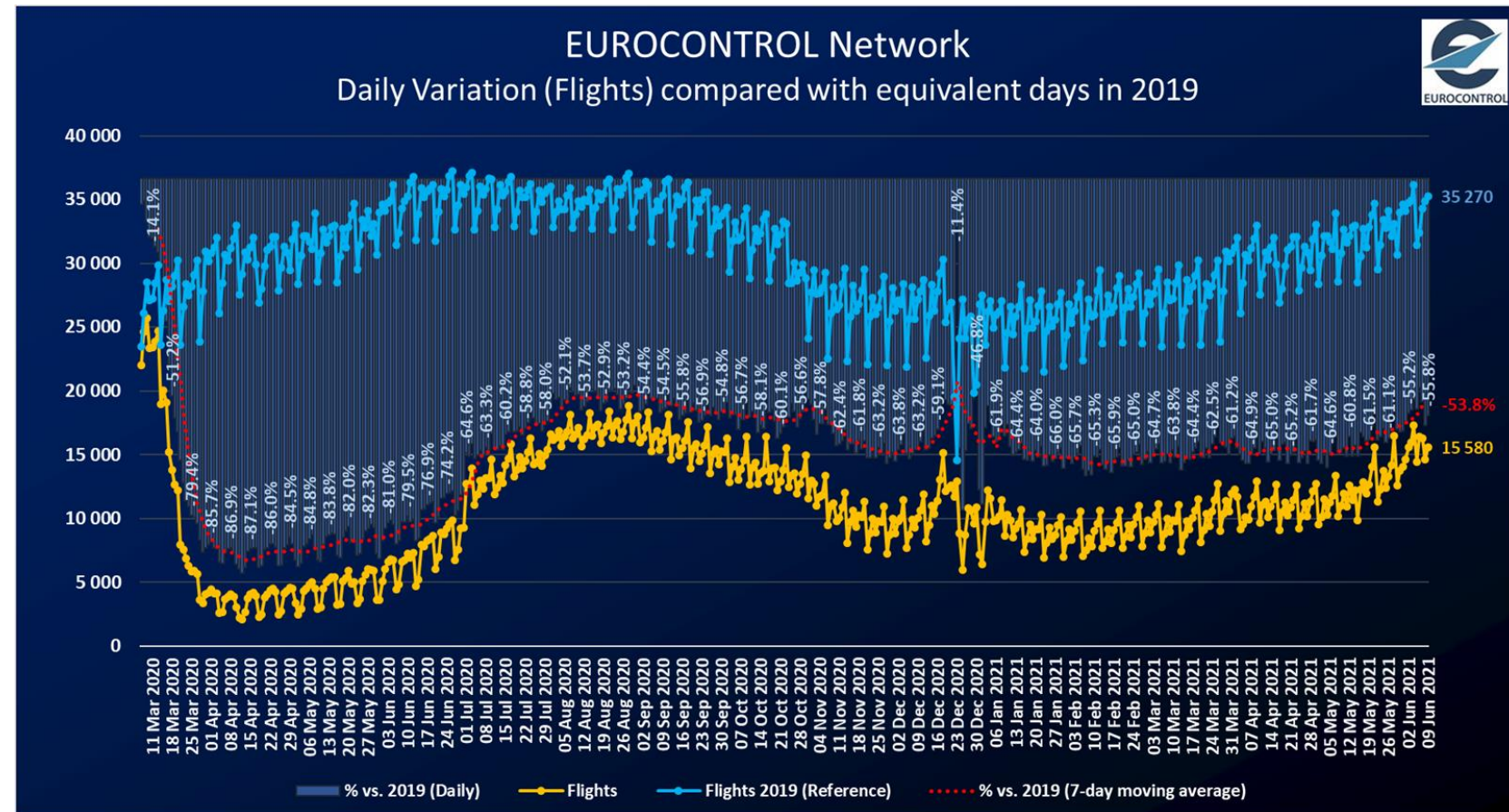
**-5.5 million**  
vs. 2019  
**(-74%)**



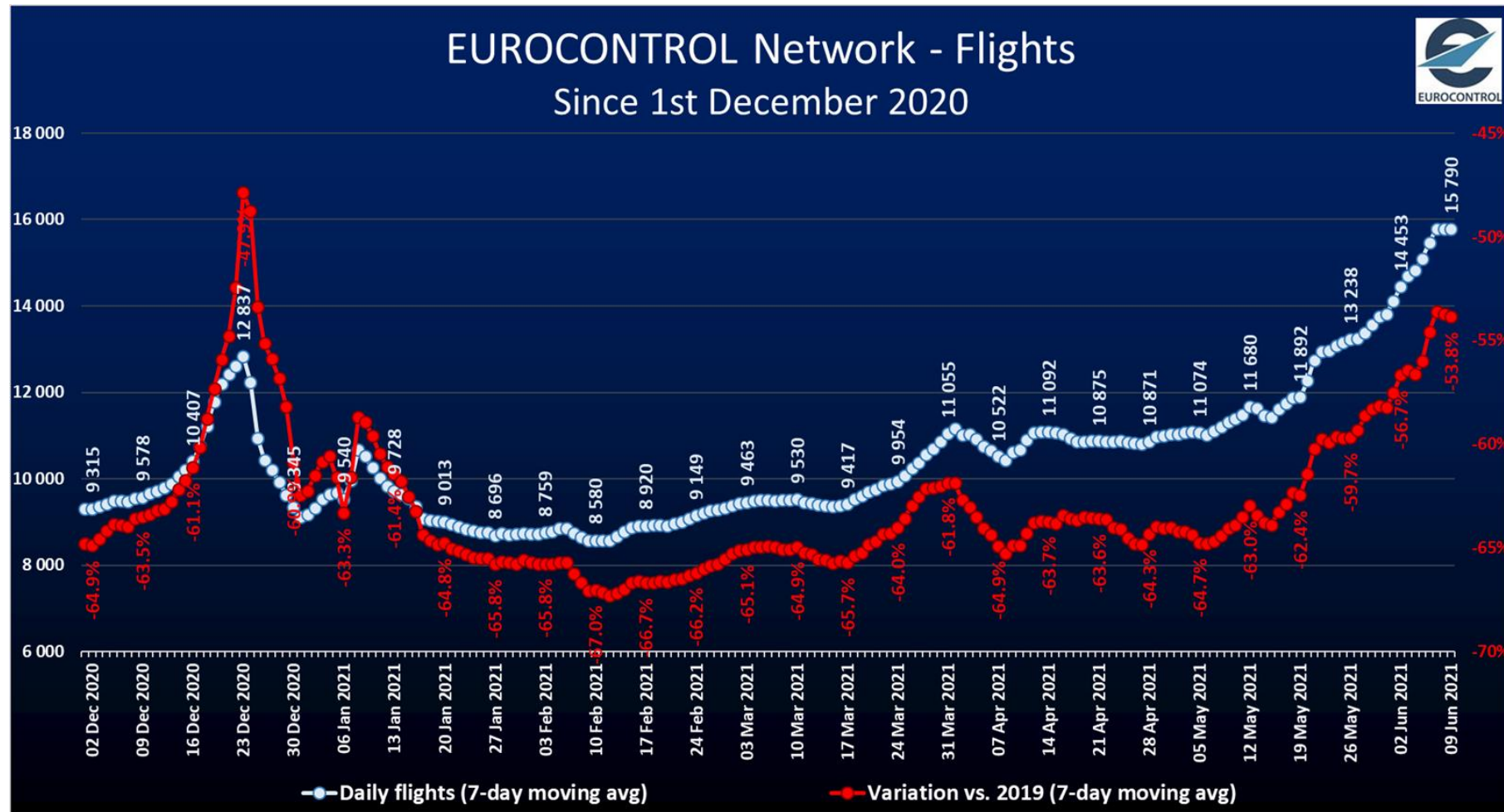
# Overall traffic situation at network level



- ✂ **15,580 flights** on Wednesday 9 June.
- ✂ **+17%** with **+2317 flights** over 2 weeks (from Wed 26 May).
- ✂ **-0%** with **-5 flights** over 1 week (from Wed 2 June).
- ✂ **44%** of 2019 traffic levels on Wednesday 9 June.



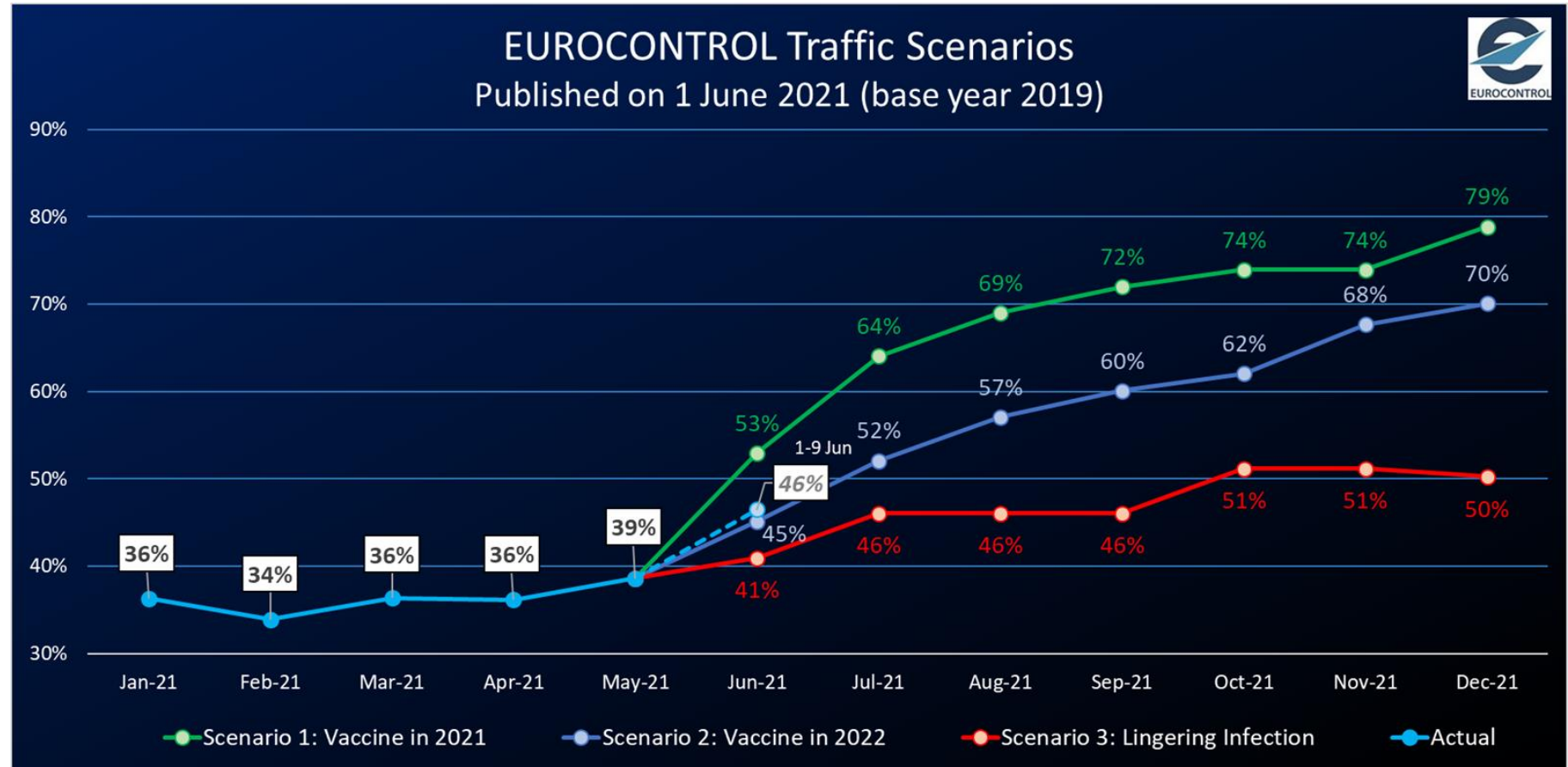
# Current traffic evolution



- ✖ The traffic has clearly been increasing over the last 5 weeks with a significant acceleration on 1<sup>st</sup> June with 2 digit increases.
- ✖ After having been stable since January at around -64% compared to 2019, the traffic has now reached -54% over the last week.

# Current situation compared to the latest EUROCONTROL traffic scenarios

- ✈ **Traffic at 46%** on 1-9 June 2021 compared to 1-9 June 2019.
- ✈ This is in line with the latest EUROCONTROL traffic scenarios published on 1 June 2021.





# Market Segments



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



On 9 June 2021, compared to 2019:

- ✗ **All-cargo** is the only segment above 2019 levels with **+16%**.
- ✗ **Biz Aviation** is at **-6%**.
- ✗ **Charter** decreased to **-37%** and decreasing since mid March.
- ✗ **Traditional** increased slightly to reach **-61%**.
- ✗ **Low-Cost** remains the most affected segment but has shown a significant rebound since 1st June reaching **-67%** vs 2019.

# Aircraft operators (Daily flights)

Top 10



Rank evolution over 2 weeks	Top 10 Aircraft Operators on Wed 09-06-2021					EUROCONTROL
	Aircraft Operator	Flights	Δ over 2 weeks	% over 2 weeks	% vs 2019	
↗	Ryanair	1010	↗ +642	+174%	↘ -61%	
↘	Turkish Airlines	836	↗ +107	+15%	↘ -40%	
↘	Air France	532	↗ +65	+14%	↘ -60%	
↘	Lufthansa	441	↗ +55	+14%	↘ -72%	
↗	KLM	391	↗ +60	+18%	↘ -58%	
↘	Wideroe	346	↘ -3	-1%	↘ -16%	
↗	Pegasus	333	↗ +63	+23%	↘ -30%	
↘	DHL Express	300	↗ +7	+2%	↗ +1%	
↗	Vueling	239	↗ +96	+67%	↘ -66%	
↗	Wizz Air	238	↗ +94	+65%	↘ -62%	

- ✈ **Ryanair** is the busiest airlines with 1010 flights.
- ✈ Positive change in the ranking over 2 weeks for **Ryanair, KLM, Pegasus, Vueling** and **Wizz Air**.
- ✈ **Highest increase** in flights over 2 weeks for:
  - **Ryanair** (+174%) driven by many flows like Italy-Italy, Spain-UK, Italy-Spain, Germany-Spain, Germany-Italy, ...
  - **Turkish Airlines** (+15%) driven by domestic flows.
  - **Vueling** (+67%) mainly driven by domestic flows in Spain.
  - **Wizz Air** (+65%) driven by many flows, in particular Italy-Italy and Germany-Romania.

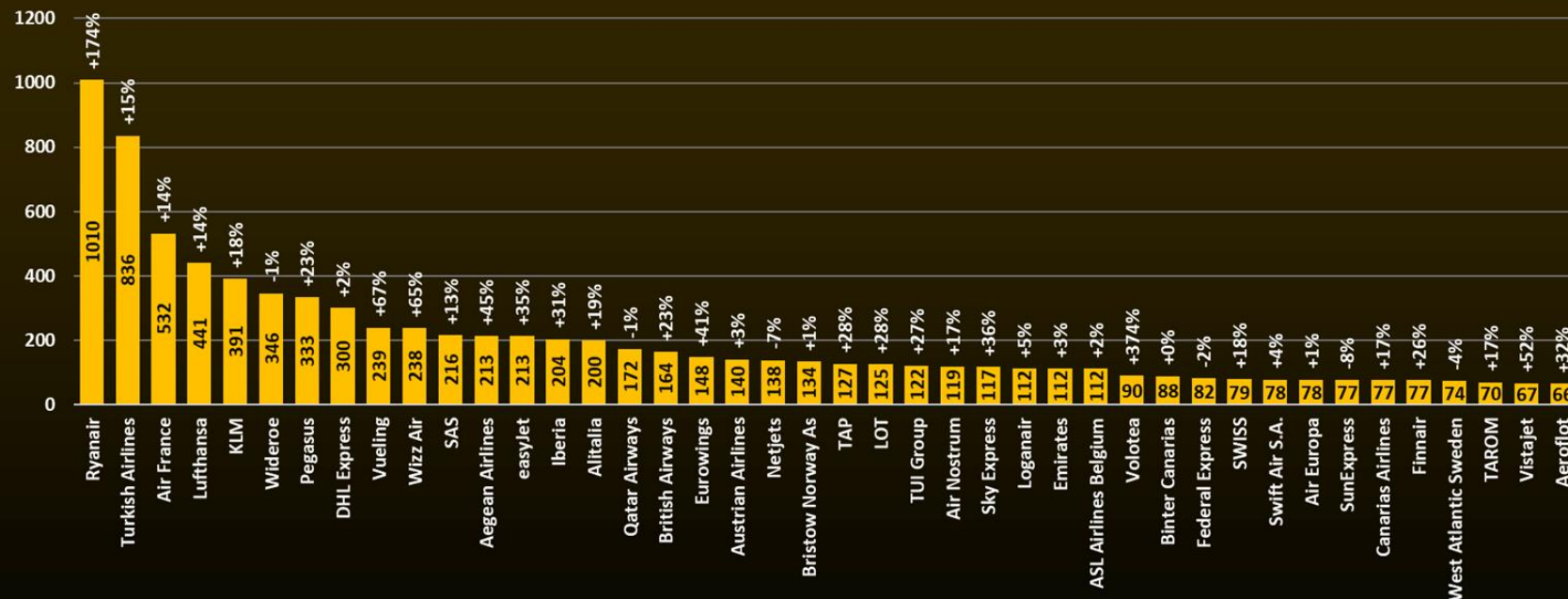


# Aircraft operators (Daily flights)

## Top 40 – Latest operations

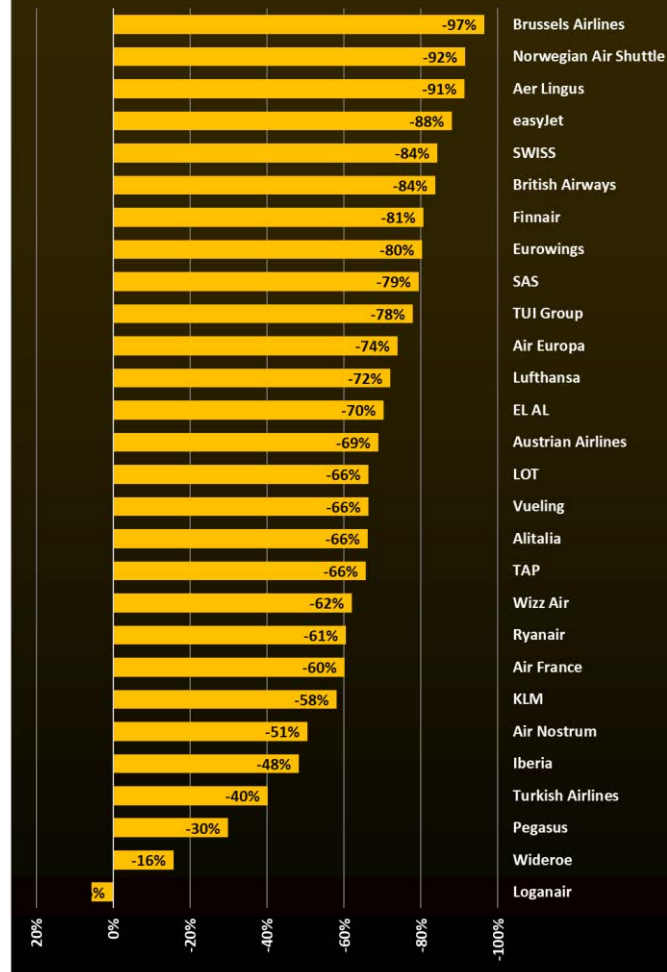


**Aircraft operators**  
Traffic on Wed 09-06-2021 and evolution compared to Wed 26-05-2021



- ✂ Largest increases in flights for **Ryanair** (+174%), **Turkish Airlines** (+15%), **Vueling** (+67%), **Wizz Air** (+65%) and **Volotea** (+374%) (many flows like Italy-Italy, Spain-Spain and France-Greece).
- ✂ Ryanair 1<sup>st</sup>, Wizz Air 10<sup>th</sup>, easyJet 13<sup>rd</sup> and British Airways 17<sup>th</sup>.
- ✂ Traffic levels ranging from -97% (Brussels Airlines operates almost no flights on Wednesdays) to -16% (Wideroe) compared to 2019.

**Aircraft Operators in EUROCONTROL Network**  
(compared with equivalent days in 2019)  
Daily Variation (IFR Flights) - Wed 09 Jun 2021



# Aircraft operators

## Latest news

### European airlines

- ✂ **Air France** planning to operate up to 98 flights/week to the French Overseas Territories.
- ✂ **Austrian Airlines** reporting forward bookings increasing for June-August, quadrupling on some routes.
- ✂ **DHL Express** starting new airline in Austria with aircraft from DHL Air UK (which will develop into an intercontinental airline).
- ✂ **easyJet** opens seasonal base at Malaga airport, the 3rd base in Spain.
- ✂ **Finnair** delays launch of routes to Tokyo Haneda, Osaka, Narita until September 2021.
- ✂ **Iberia** planning to take delivery of its first A321XLR in 2023 to use on new trans-Atlantic routes.
- ✂ **Ryanair** reports May passenger numbers 86.7% down on 2019.
- ✂ **SAS** secures a credit line of approx. €300 million from the governments of Denmark and Sweden (subject to EU approval); reports net loss of €240 million for 3 months to end April.



- ✂ **SWISS** plans to halve its carbon emissions by 2030.
- ✂ **Wizz Air** to suspend domestic services in Norway from 14 June; reports €576 net loss for year to end of March but an increase in its fleet from 121 to 137; restarts 7 Budapest routes (Podgorica, Malta, Lisbon, Catania, Barcelona, Bari & Gothenburg).

### Worldwide airlines

- ✂ **Aeroflot Group** reports net loss of €280 million in Q1 2021.
- ✂ **Cathay Pacific** resumes recruiting Hong Kong based pilots; closing its Australia pilot base.
- ✂ **China Southern Airline** receives US\$156 million loan from parent company.
- ✂ **Emirates** to resume Nice and Lyon services in July.
- ✂ **JAL** April passenger numbers down 62% (domestic) and 98% (international) on April 2019.
- ✂ **SAA** unlikely to return to long haul until 2023.
- ✂ **Singapore Airlines** to resume Manchester service from 17 July.
- ✂ **Wizz Air Abu Dhabi** to launch 4 new Greek routes from July.

# States (Daily Departure/Arrival flights)

## Top 10



Rank evolution over 2 weeks	Top 10 States on Wed 09-06-2021					EUROCONTROL	
	State	Flights (Dep/Arr)		Δ over 2 weeks	% over 2 weeks	% vs 2019	
→	Germany	2518	↗	+410	+19%	↘	-62%
→	France	2327	↗	+305	+15%	↘	-53%
→	Spain	2182	↗	+524	+32%	↘	-58%
→	United Kingdom	1775	↗	+254	+17%	↘	-73%
→	Turkey	1666	↗	+223	+15%	↘	-50%
→	Italy	1651	↗	+459	+39%	↘	-61%
→	Norway	915	↗	+54	+6%	↘	-48%
↗	Greece	833	↗	+275	+49%	↘	-55%
↘	Netherlands	745	↗	+96	+15%	↘	-60%
→	Portugal	577	↗	+113	+24%	↘	-52%

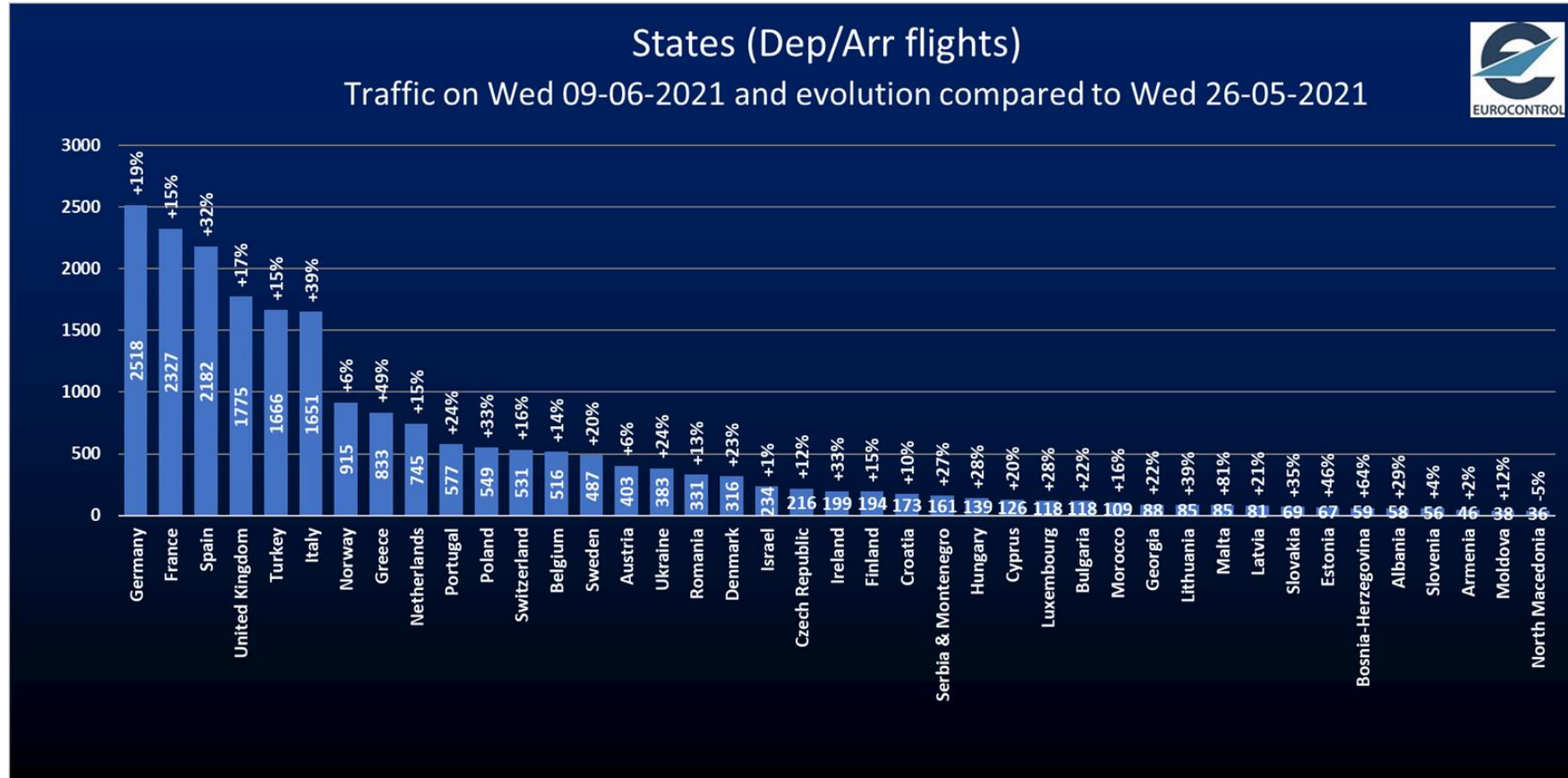
✂ **Highest increases** in flights over 2 weeks:

- **Spain** (+32%) mainly driven by Ryanair and Vueling. Domestic flows and Germany-Spain, Spain-UK, Italy-Spain
- **Italy** (+39%) mainly driven by Ryanair. Domestic flows + Italy-Spain.
- **Germany** (+19%) mainly driven by light aircraft operators, Ryanair and DLH. Domestic flows and Germany-Spain.
- **France** (+15%) mainly driven by light aircraft and Air France. Domestic flows and France-Germany.
- **Greece** (+49%) mainly driven by Olympic, Sky Express and Ryanair. Domestic flows and flows to Northern Europe.
- **UK** (+17%) mainly Ryanair. Domestic flows and Spain-UK and Italy-UK.



# States (Daily Departure/Arrival flights)

## Latest traffic situation



✂ Largest increases in flights for **Spain (+32%)**, **Italy (+39%)**, **Germany (+19%)**, **France (+15%)**, **Greece (+49%)**, **UK (+17%)** and **Turkey (+15%)**.

✂ Traffic levels ranging from -81% (Morocco) to -11% (Bosnia-Herzegovina) vs 2019.



# Associations, Authorities, Industry and States



- ✂ **IATA** warns of potential airport chaos without governmental acceptance of digital health certificates etc.; expects airlines to be challenged by rising fuel costs as traffic resumes; provides detailed risk assessment of international travel with a comparison of different mitigation measures; expresses disappointment on the European Council approach on SES2+; reports global cargo levels in April 12% higher than April 2019.
- ✂ **EU Digital COVID Certificate** goes live with Bulgaria, Croatia, Czechia, Denmark, Germany, Greece & Poland .
- ✂ **EASA** publishes guidelines for the maintenance of ATCO skills during the pandemic.
- ✂ **FAA** downgrades Mexico's air safety rating.
- ✂ **NAV CANADA** launches an app to enable drone users to submit flight authorisation requests for controlled airspace.

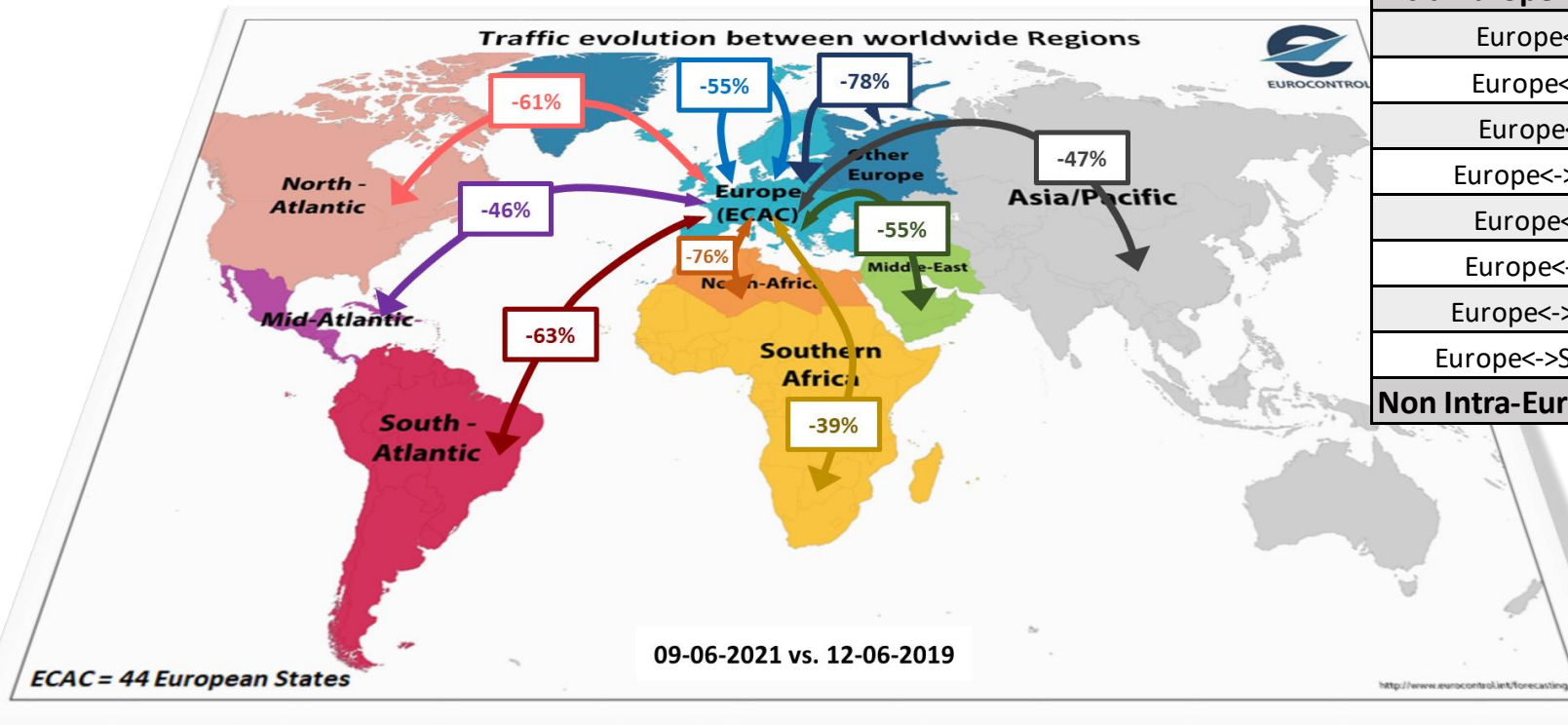
✂ **Airbus** expects the commercial aircraft market to recover to pre-COVID levels between 2023 and 2025.

- ✂ **Ireland** will operate the EU Digital COVID Certificate from 19 July; removes US France, Belgium & Luxembourg from its mandatory hotel quarantine list.
- ✂ **Italy** and the **UAE** establish quarantine-free travel corridor from 2 July.
- ✂ **Greece** and **Russia** expect charter services to resume on 20 June.

# Traffic flows (Daily Departure/Arrival flights)

- ✂ The main traffic flow is the intra-Europe flow with 12,509 flights on Wednesday 9 June, which is increasing (+21%) over 2 weeks.
- ✂ Intra-Europe flights are at -55% compared to 2019 while intercontinental flows are at -62%.

REGION	26-05-2021	09-06-2021	%	vs. 2019
<b>Intra-Europe</b>	<b>10 341</b>	<b>12 509</b>	<b>+21%</b>	<b>-55%</b>
Europe<->Asia/Pacific	400	414	+3%	-47%
Europe<->Mid-Atlantic	66	79	+20%	-46%
Europe<->Middle-East	626	680	+9%	-55%
Europe<->North Atlantic	473	547	+16%	-61%
Europe<->North-Africa	227	228	+0%	-76%
Europe<->Other Europe	286	301	+5%	-78%
Europe<->South-Atlantic	69	63	-9%	-63%
Europe<->Southern Africa	174	173	-1%	-39%
<b>Non Intra-Europe</b>	<b>2 321</b>	<b>2 485</b>	<b>+7%</b>	<b>-62%</b>





# Country pairs (Daily Departure/Arrival flights)

Top 10



Rank evolution over 2 weeks	Top 10 Country-Pair on Wed 09-06-2021					EUROCONTROL
	Country-Pair	Dep/Arr Flights	Δ over 2 week	% over 2 week	% vs 2019	
→	France <-> France	1035	↗ +94	+10%	↘ -24%	
→	Spain <-> Spain	871	↗ +140	+19%	↘ -35%	
↗	Turkey <-> Turkey	744	↗ +90	+14%	↘ -25%	
↘	Norway <-> Norway	733	↗ +37	+5%	↘ -28%	
↗	Italy <-> Italy	596	↗ +117	+24%	↘ -37%	
↘	United Kingdom <-> United Kingdom	564	↗ +67	+13%	↘ -48%	
→	Germany <-> Germany	510	↗ +63	+14%	↘ -53%	
→	Greece <-> Greece	326	↗ +89	+38%	↘ -25%	
→	Germany <-> Spain	288	↗ +75	+35%	↘ -54%	
→	Sweden <-> Sweden	227	↗ +31	+16%	↘ -54%	

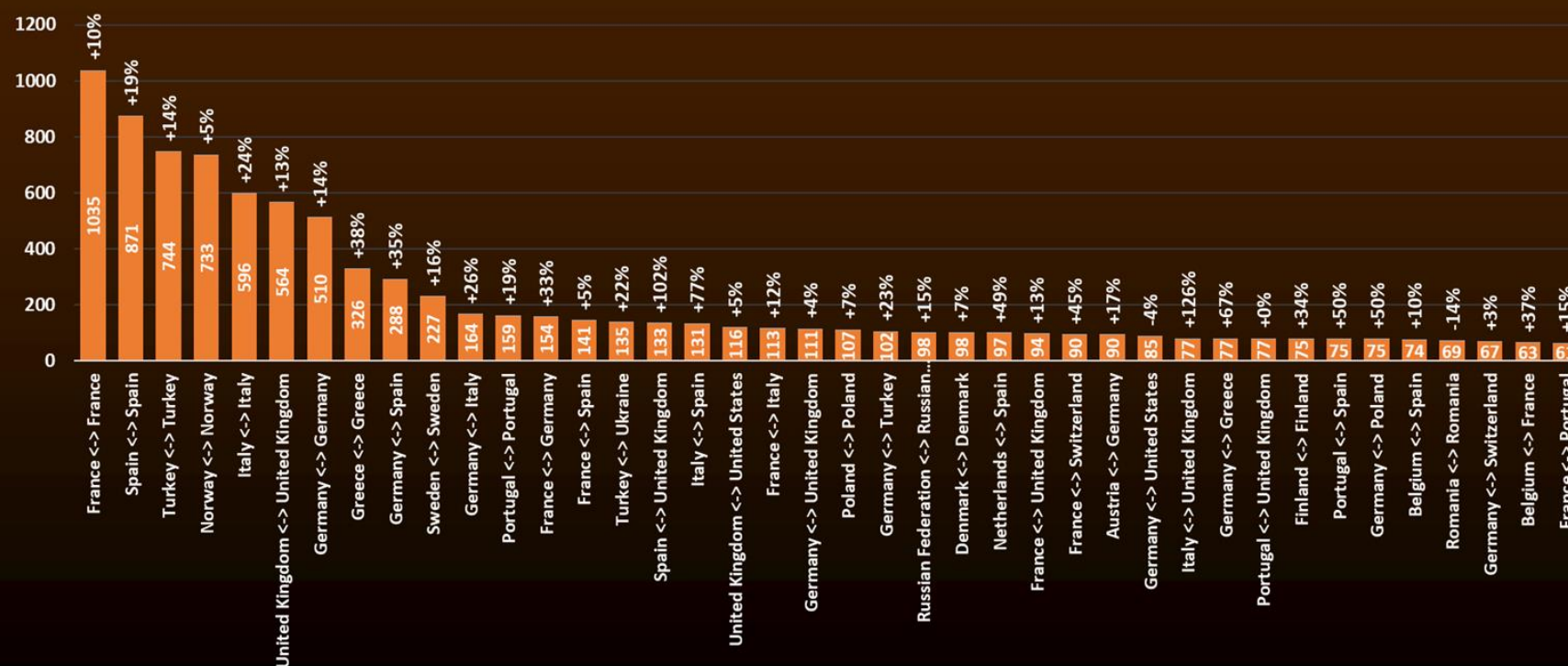
- ✗ 9 of the top 10 flows are domestic.
- ✗ **Highest increases** in flights over 2 weeks for domestic flows in:
  - **Spain** (+19%) mainly due to Vueling, Ryanair, Air Nostrum, Volotea, Iberia Express and Canarias Airlines.
  - **Italy** (+24%) mainly due to Ryanair, Wizz Air, Volotea, Alitalia and easyJet.
  - **France** (+10%) mainly due to light aircraft operators, light military and Air France.
  - **Turkey** (+14%) mainly due to Turkish Airlines and Pegasus.
  - **Greece** (+38%) mainly due to Olympic, Sky Express and light AOs

# Country pairs (Daily Departure/Arrival flights)

Latest traffic situation



Top 40 Country-Pairs ( Dep/Arr flights).  
Traffic on Wed 09-06-2021 and evolution compared to Wed 26-05-2021



✖ The busiest non-domestic flows were:

- **Germany-Spain** (288 flights, +35% over 2 weeks).
- **Germany-Italy** (164, +26%).
- **France-Germany** (154, +33%).
- **France-Spain** (141, +5%).
- **Turkey-Ukraine** (135, +22%).
- **Spain-UK** (133, +102%).
- **Italy-Spain** (131, +77%).
- **UK-US** (116, +5%).
- **France-Italy** (113, +12%).

# Outside Europe

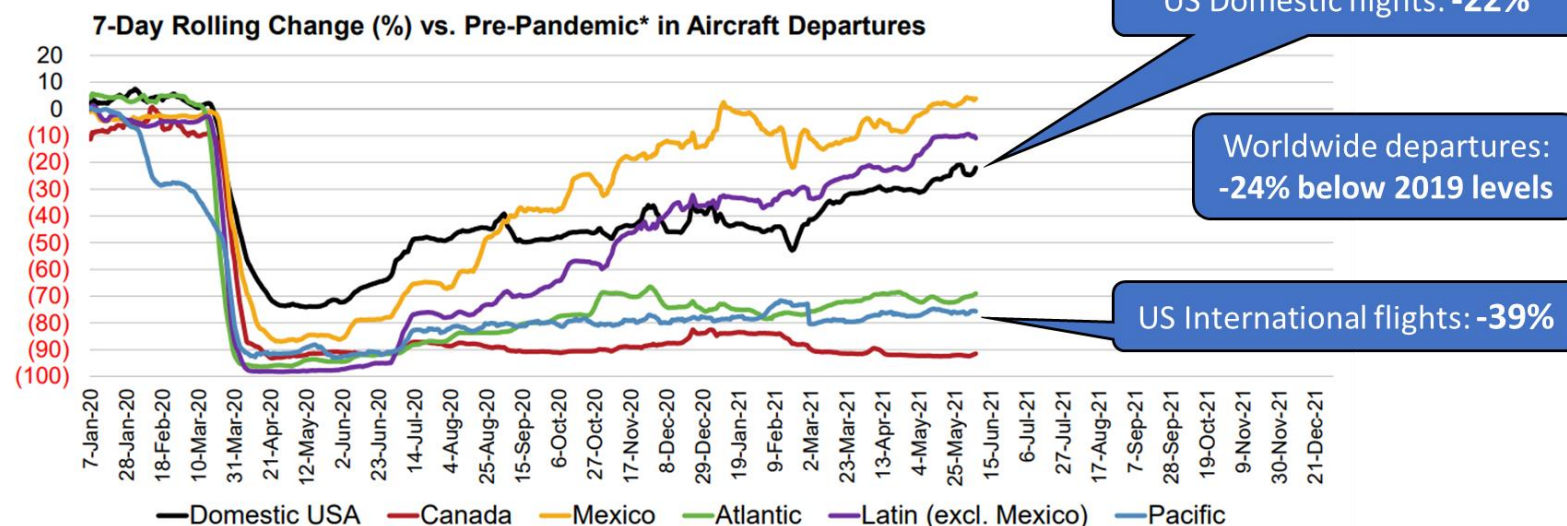


## USA

- ✂ Bookings are improving but demand for corporate and long-haul international air travel are lagging.
- ✂ On 8 June, US passenger airline departures were 24% below 2019 levels with domestic down 22% and international down 39%.
- ✂ The domestic US load factor is closing in on pre-pandemic levels to around 85%.
- ✂ In May 2021, U.S.-International Air Travel\* fell 66% 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 24% Below Pre-Pandemic Levels**  
Domestic Flights Operated Down 22%, International Flights Operated Down 39%



Source: A4A member passenger airlines and branded code share partners

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



16

airlines.org

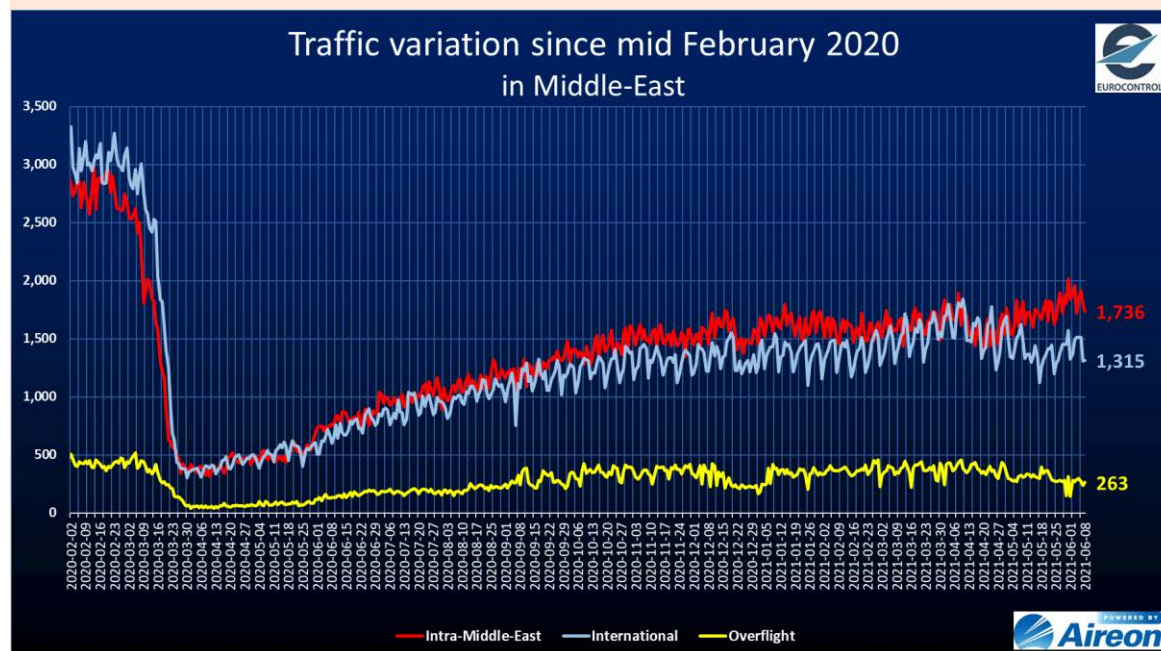


# Outside Europe



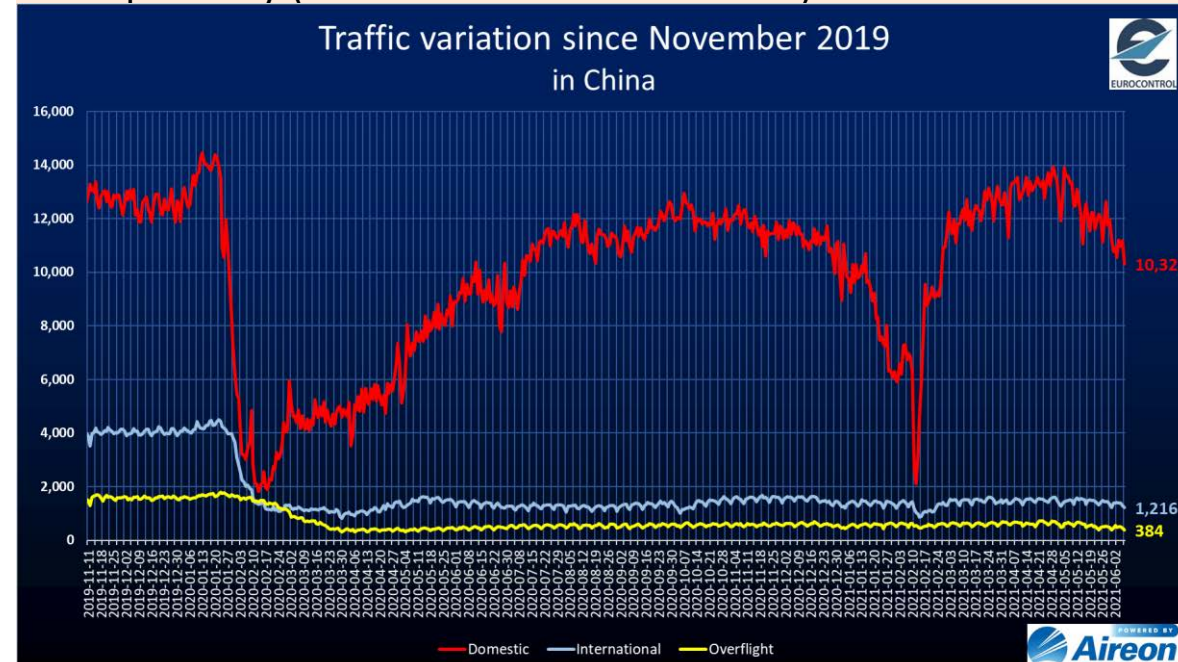
## Middle East

- ✂ Intra-Middle-East traffic recorded around 1,736 daily flights on 8 June (-38% compared to Feb 2020).
- ✂ On 8 June, international traffic from and to Middle-East recorded 1,315 flights (-57% compared to Feb 2020).
- ✂ Overflights have slightly decreased to 263 flights (-38% compared to Feb 2019) over the recent weeks.



## China

- ✂ On 7 June, domestic traffic recorded 10,321 flights (-13% compared to January 2020 levels), a 2-week slow down due to traffic restrictions at Guangzhou. The southern Chinese city deals with an outbreak of the Delta variant first identified in India.
- ✂ International flights and overflights are still suppressed, they were stable on previous weeks with 1,216 and 384 flights respectively (-70% and -76% vs 1 Jan 2020).



# Airports (Daily Departure/Arrival flights)

## Top 10 and latest news



Rank evolution over 2 weeks	Top 10 Airports on Wed 09-06-2021					EUROCONTROL
	Airport	Dep/Arr Flights	Δ over 2 weeks	% over 2 weeks	% vs 2019	
→	IGA Istanbul Airport	637	↗ +59	+10%	↘ -48%	
↗	Frankfurt	578	↗ +74	+15%	↘ -63%	
↗	Amsterdam	563	↗ +69	+14%	↘ -63%	
↘	Paris/Charles-De-Gaulle	560	↗ +53	+10%	↘ -62%	
→	Madrid/Barajas	527	↗ +76	+17%	↘ -59%	
→	Istanbul/Sabiha Gokcen	470	↗ +94	+25%	↘ -28%	
↗	Athens	445	↗ +127	+40%	↘ -40%	
↘	London/Heathrow	424	↗ +60	+16%	↘ -69%	
→	Barcelona	382	↗ +100	+35%	↘ -65%	
↗	Palma De Mallorca	324	↗ +83	+34%	↘ -59%	

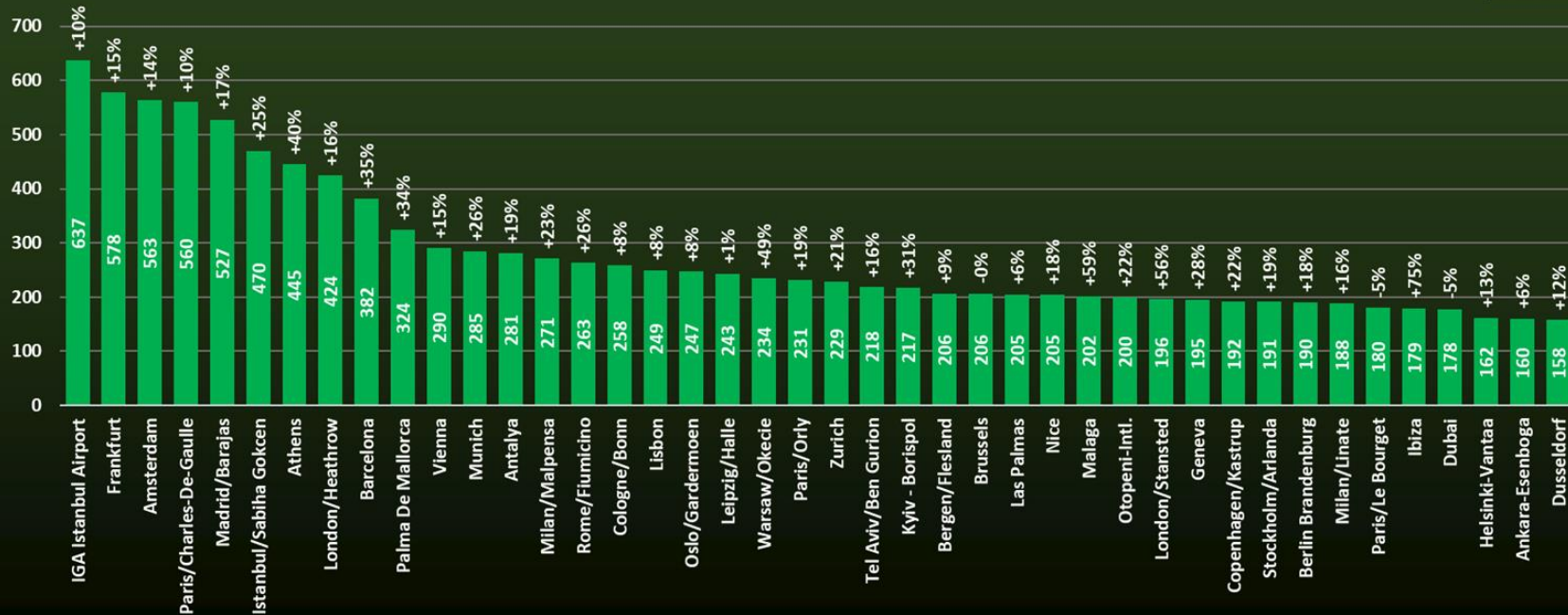
- ✖ Positive change for 8 of the top 10 airports.
- ✖ Highest increases in flights for:
  - **Athens** (+40%) mainly Olympic and Sky Express. Domestic flows.
  - **Barcelona** (+35%) mainly Vueling and Ryanair. Domestic flows.
  - **Istanbul/Sabiha** (+25%) mainly Pegasus and Turkish Airlines. Domestic flows.
  - **Palma** (+34%) mainly Ryanair and Vueling. Flows Spain-Spain and Germany-Spain.
  - **Madrid** (+17%) mainly Ryanair, Iberia, Vueling, Air Nostrum. Domestic flows + with Italy, Germany and Portugal.

# Airports (Daily Departure/Arrival flights)

## Latest operations



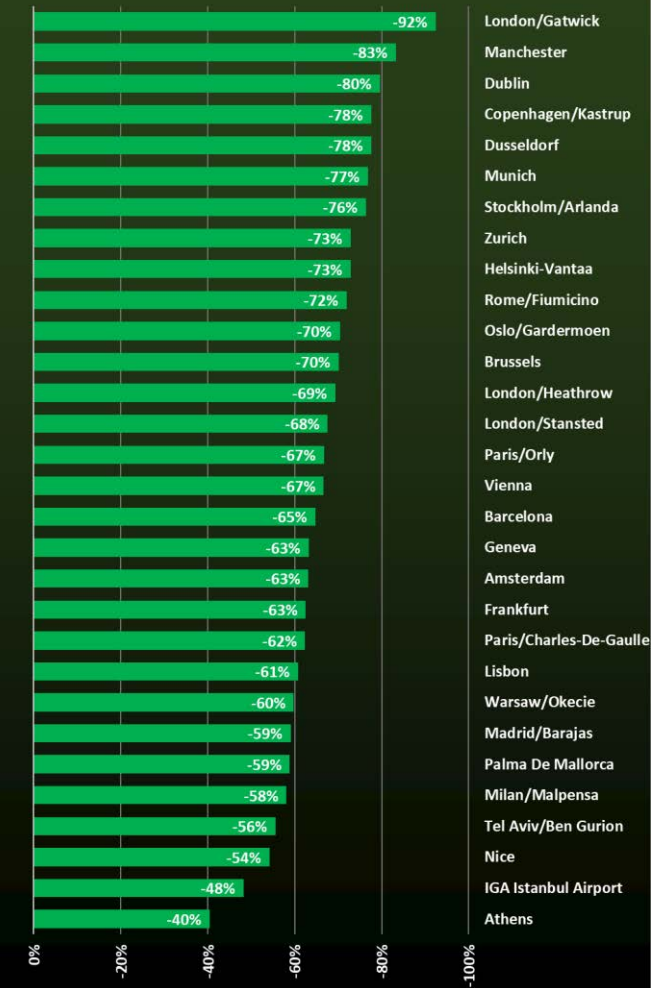
Top 40 Airports (Dep/Arr flights)  
Traffic on Wed 09-06-2021 and evolution compared to Wed 26-05-2021



✖ Largest increases in flights for **Athens (+40%)**, **Barcelona (+35%)**, **Istanbul/Sabiha (+25%)**, **Palma (+34%)**, **Warsaw (+49%)**, **Ibiza (+75%)**, **Madrid (+17%)**, **Frankfurt (+15%)**, **London/Stansted (+56%)**, **Amsterdam (+14%)**.

✖ Traffic levels ranging from -92% (Gatwick) to -40% (Athens) compared to 2019.

Airports in EUROCONTROL Network  
(compared with equivalent days in 2019)  
Daily Variation (IFR Dep/Arr Flights) - Wed 09 Jun 2021

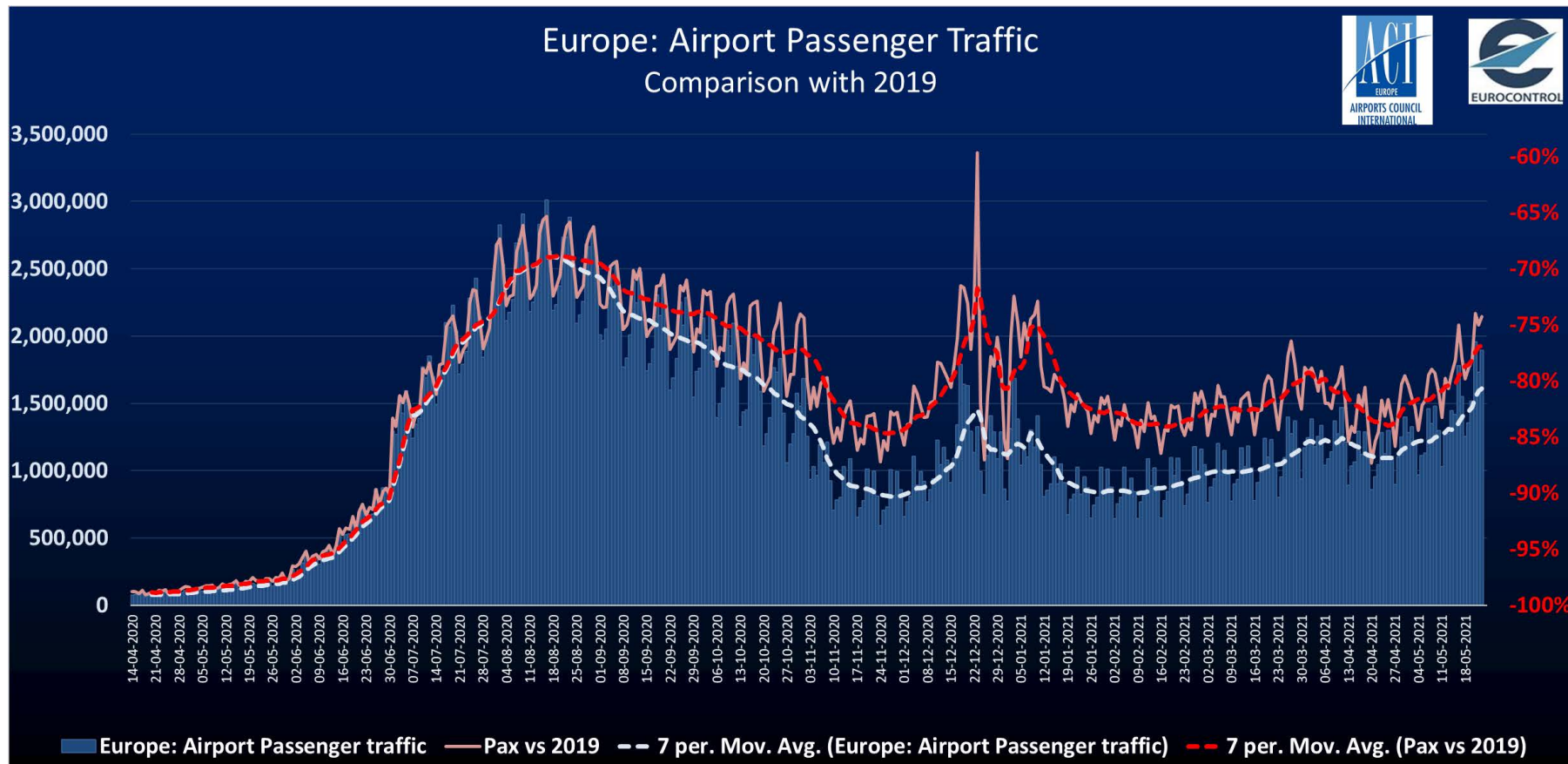






- ✂ **Amsterdam Schiphol Airport** is reported as projecting peak summer demand of 160,000/day, 32% down on before the pandemic.
- ✂ **Barcelona Airport** to reopen Terminal 2 on 15 June.
- ✂ **Berlin Brandenburg Airport** reports May passenger numbers 88% down compared to SXF/TXL in May 2019.
- ✂ **Copenhagen Airport** CEO says previously planned investments (2020-22) will be reduced by more than DKK2 billion (€269 million).
- ✂ **Finavia** reports May passenger numbers in its airport network down 93.2% on May 2019 (domestic -88.2%, international -94.4%).
- ✂ **Frankfurt Airport** reopens Terminal 2 after more than one year; plans to open Terminal 3 in 2026.
- ✂ **Innsbruck Airport** to close for renovations from 20 September for 4 weeks.
- ✂ **London Stansted Airport** wins planning appeal to expand passenger capacity.
- ✂ **London Heathrow Airport** reopens Terminal 3 as a dedicated arrivals facility for passengers arriving from 'red list' countries; incorporates SAF into its fuel supply.
- ✂ **Milan Linate** completes €40 million terminal redevelopment.
- ✂ **Munich Airport** to reopen Terminal 1 on 23 June after 7 months closure.

# Passengers



- ✈ **ACI recorded just below 1.9 million passengers on 23 May 2021\***, a **loss of 5.5 million passengers** compared to the equivalent day in 2019 (**-74%**).
- ✈ For the first quarter **2021**, **ACI Europe reported passenger traffic fell by 76%** while **freight traffic increased by 10.6%** at European\*\* airports.

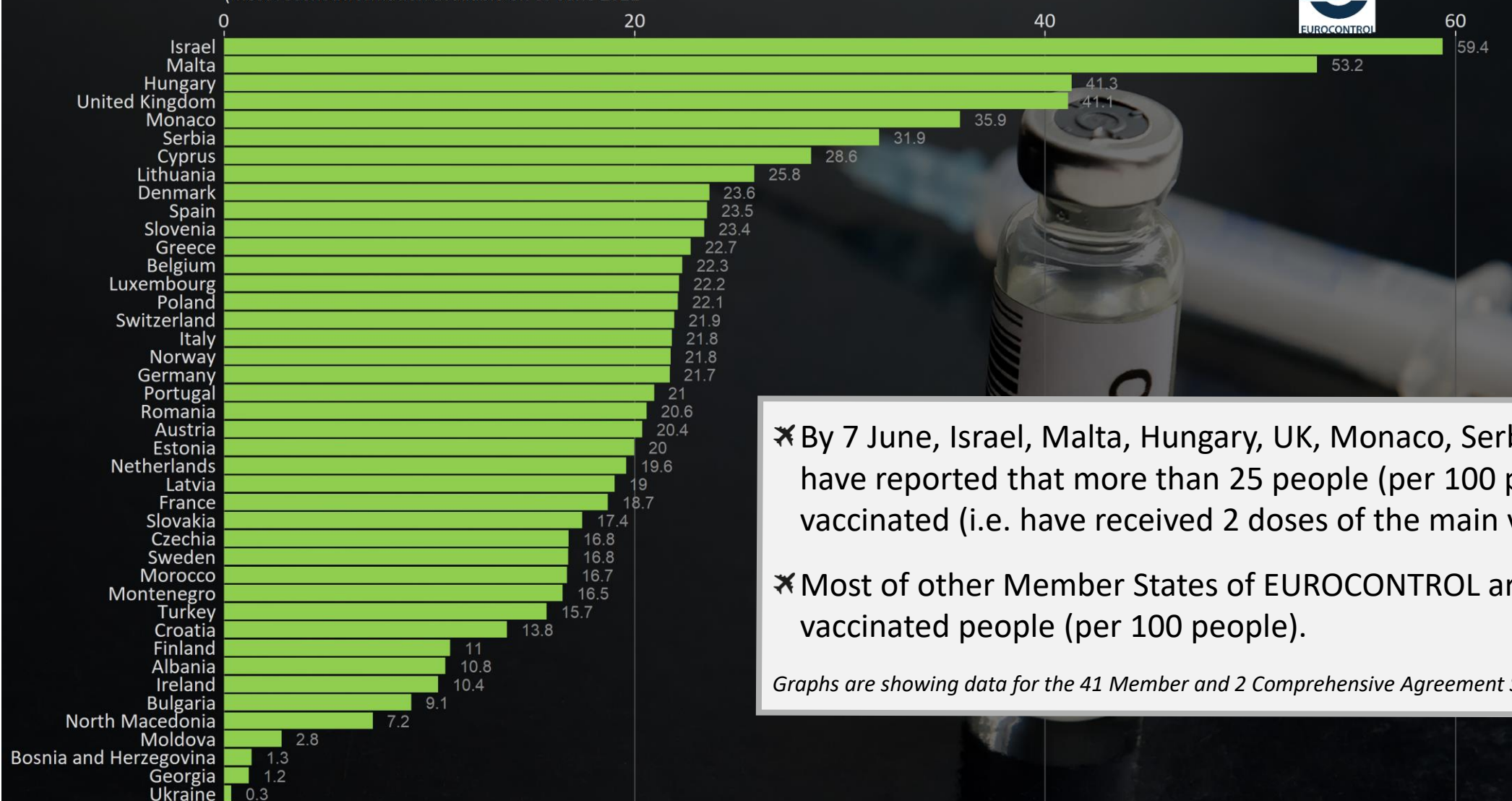
\* Latest available data from ACI  
\*\* Russia included.

# Vaccination updates



## People fully vaccinated (per 100 people)

(most recent information available on 07 June 2021)

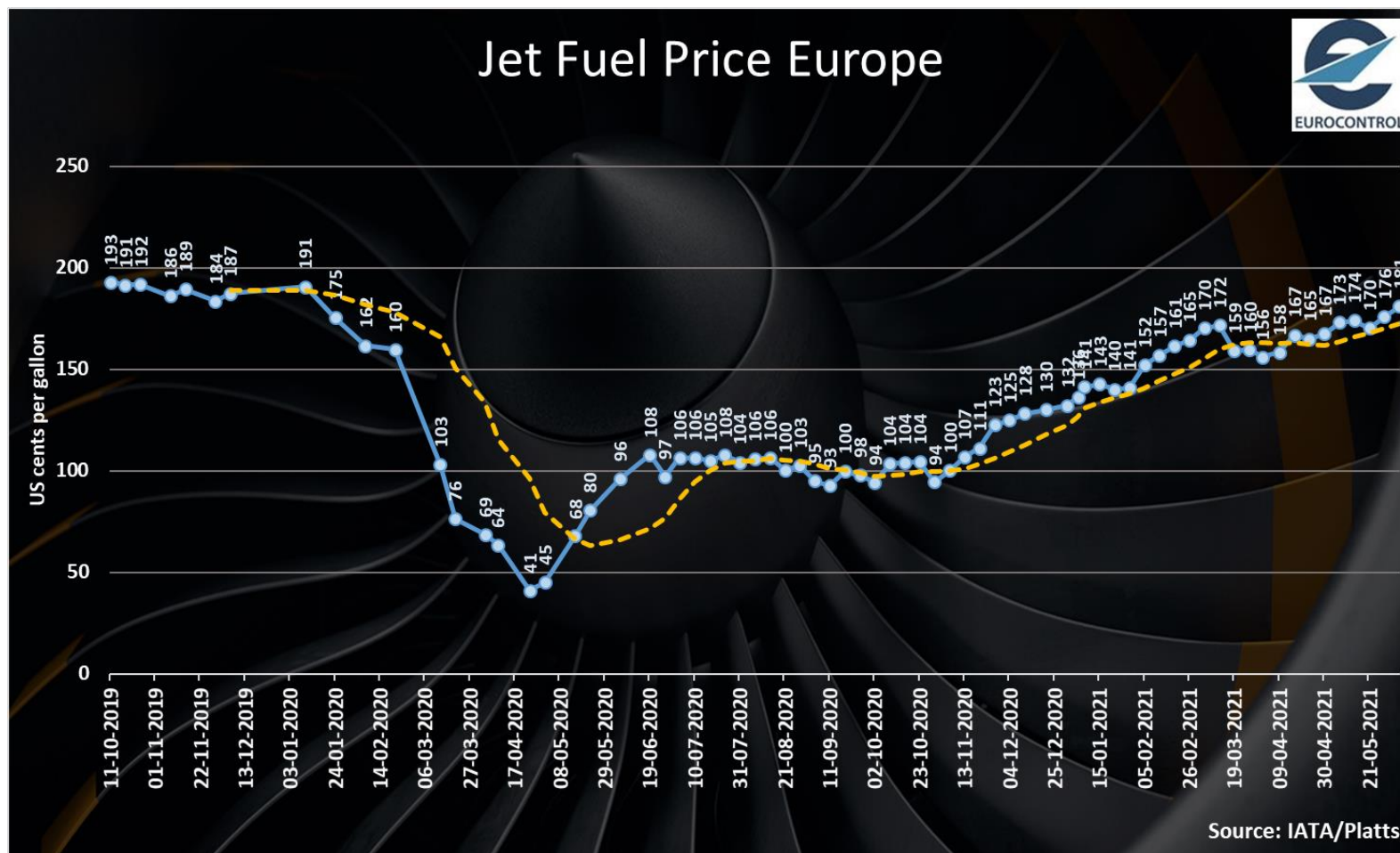


✖ By 7 June, Israel, Malta, Hungary, UK, Monaco, Serbia and Cyprus have reported that more than 25 people (per 100 people) were fully vaccinated (i.e. have received 2 doses of the main vaccines).

✖ Most of other Member States of EUROCONTROL are around 20 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



✖ **Jet fuel prices** have started to rise since last Autumn, from around 100 cts/gal in October 2021 to 181 cts/gal on 4 June 2021.

✖ The jet fuel prices are around 10 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](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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