

24 June 2021



COVID 19 IMPACT ON EUROPEAN AVIATION

EUROCONTROL
Comprehensive Assessment



SUPPORTING EUROPEAN AVIATION



NETWORK
MANAGER



Headlines

- 18,094 flights (51% of 2019 levels) on Wed 23 June 2021, increase (+16%) over 2 weeks.
- Continuous traffic increase (2-digit) as of early June. Record number on 18 June with 19,826.
- Ryanair, busiest operator, with about 1,000 additional flights per day since start of June. Five Low cost airlines are now back in the top 10 airlines.
- High increase for many States: Spain (+21%), Turkey (+26%), Germany (+15%), France (+15%), Greece (+41%), Italy (+21%) and Morocco (+275%, authorities facilitated return for nationals).
- High increase for domestic flows and flows between Southern and Northern European States. Noticeable increases on flows between Europe and Morocco as well as Russia-Turkey.
- Domestic traffic vs 2019: Europe (-49%), US (-19%), China (-7%) (recent decline due to lockdown in the Guangzhou area), Middle-East (-32%).



Traffic Situation

Daily flights (including overflights)

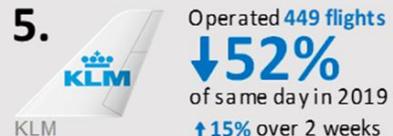
Traffic over the last 7 days is

↓48%

Compared to equivalent days in 2019

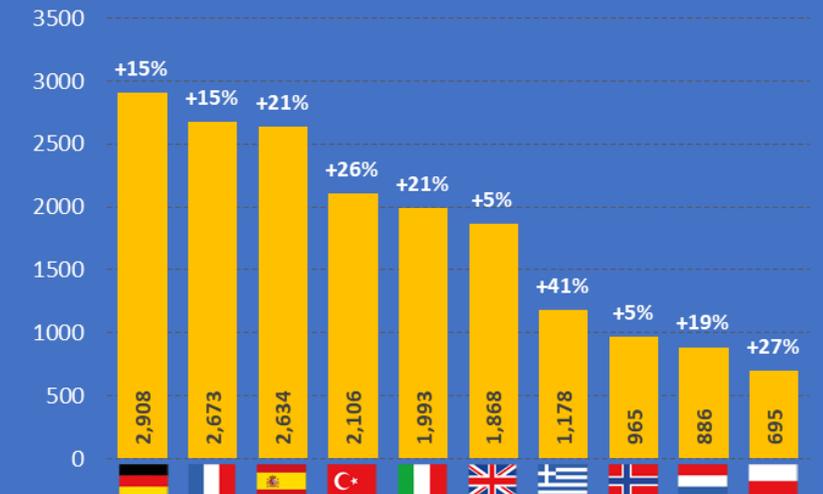
Top 10 Aircraft Operators

on Wed 23 June 2021 (daily flights)



Top 10 Busiest States

on Wed 23 June 2021
(Dep/Arr flights and variation over 2 weeks)



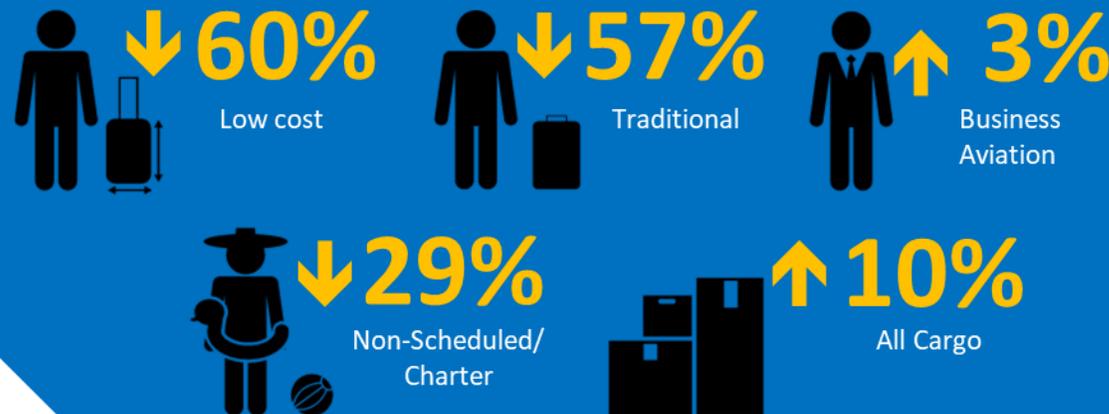
Top 10 Busiest Airports

7-day average Dep/Arr flights on 17-23 June, compared to 2019

Top 10 Airports	Average flights per day (week 17-23/6)	Average flights per day (week 17-23/6) vs 2019
IGA Istanbul Airport	734	-42%
Amsterdam	710	-53%
Frankfurt	691	-55%
Paris/Charles-De-Gaulle	652	-57%
Madrid/Barajas	608	-52%
Istanbul/Sabiha Gokcen	553	-18%
Athens	543	-30%
Barcelona	482	-56%
Palma De Mallorca	472	-47%
London/Heathrow	462	-66%

Market Segments

On 23 Jun, compared to 2019



Traffic Flow

On 23 June, the **intra-European** traffic flow was

14,353 flights **+ 15%** over past 2 weeks **-49%** Compared to 2019

Route charges

(May 2021)

Amount billed

€ 234 million

Jan-May 2021 amount billed

€ 980 million

vs. Jan-May 2019

-67%

Economics

(18 June 2021)

Fuel price

↑ 185
Cents/gallon

compared to 184 cents/gallon on 11 June 2021

Source: IATA/Platts

Passengers

(03 June 2021)

2 million pax

-5.3 million

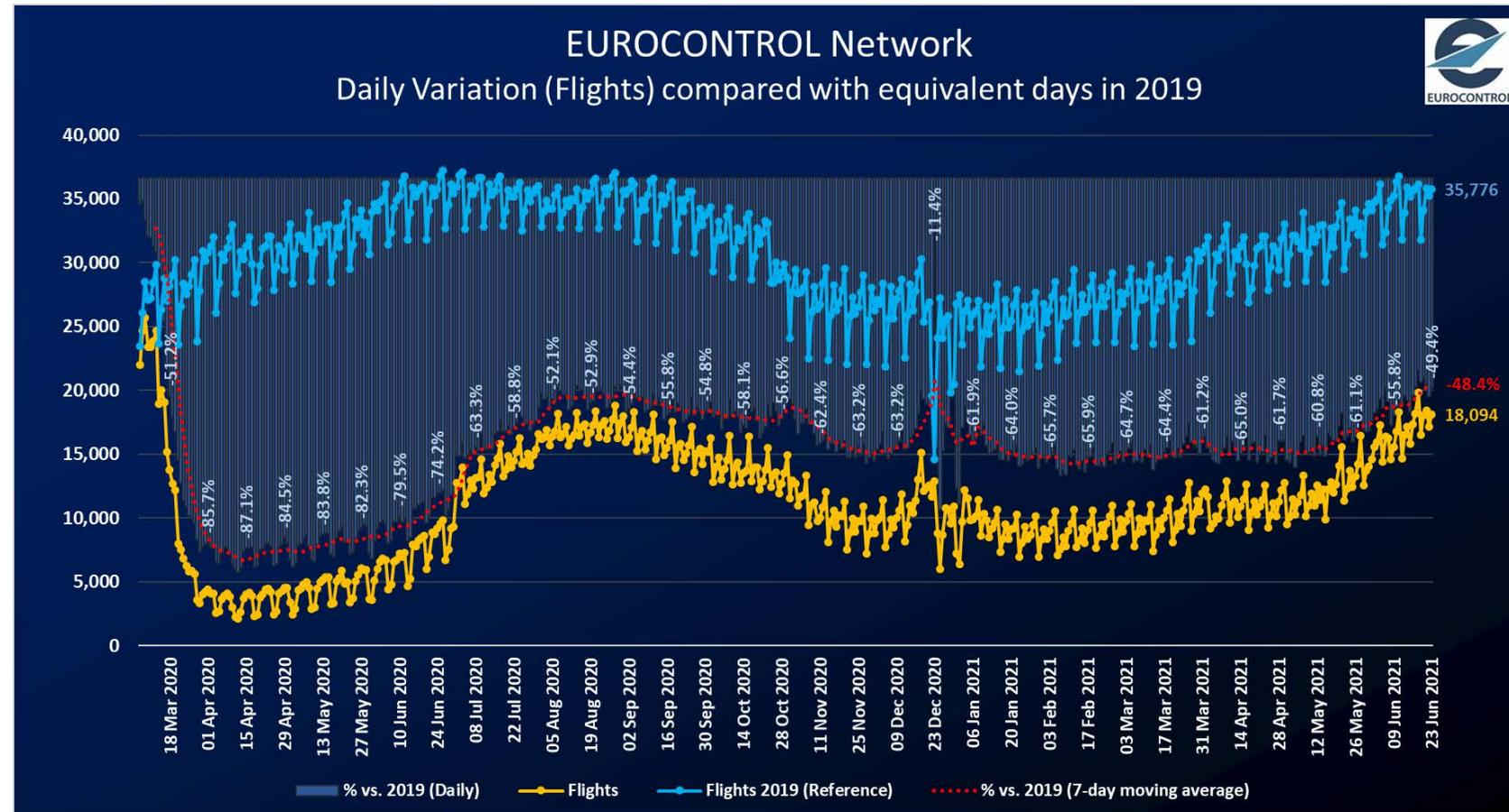
vs. 2019

(-73%)

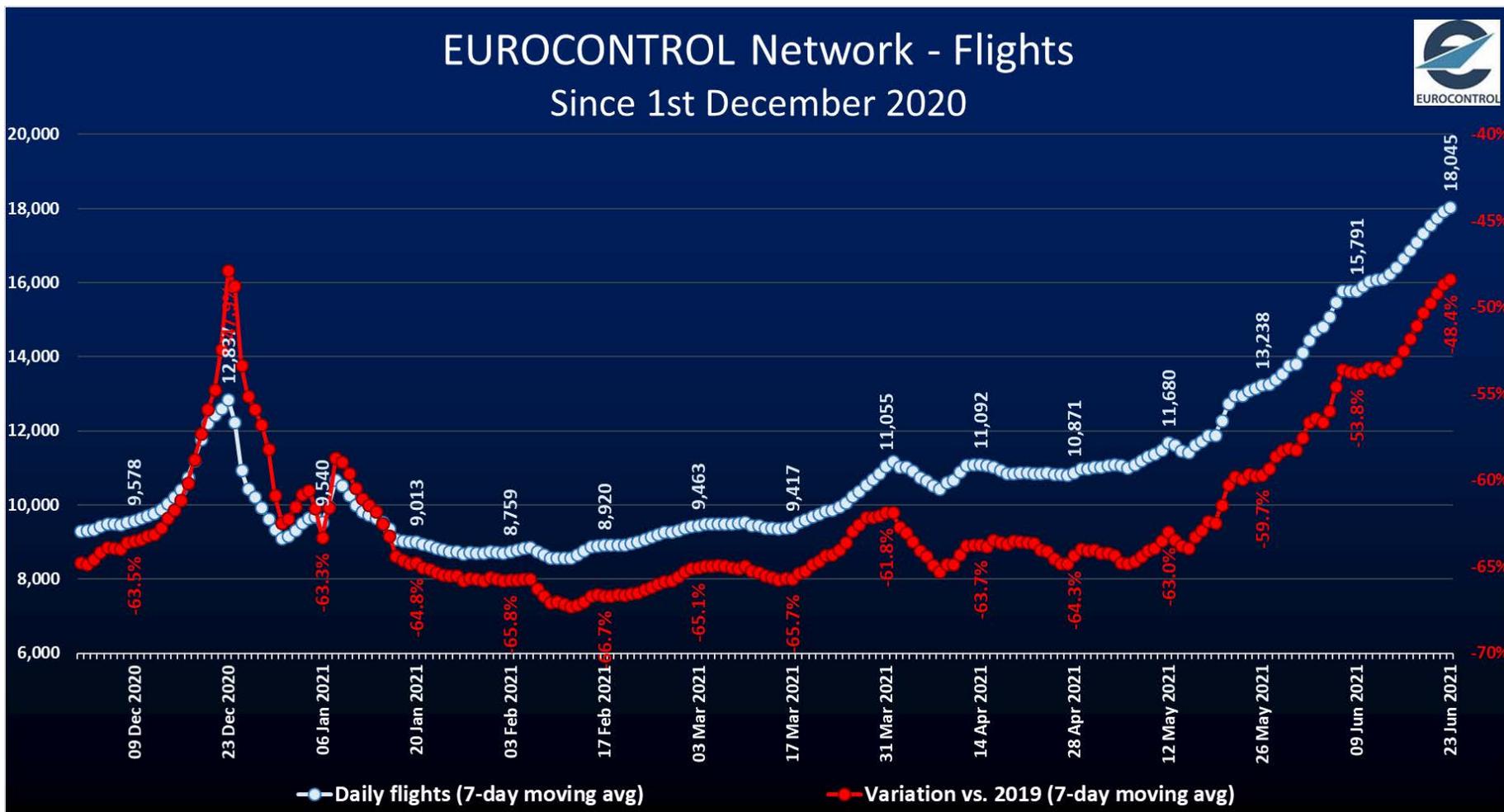
Overall traffic situation at network level



- ✘ **18,094 flights** on Wednesday 23 June.
- ✘ **+16%** with **+2,510 flights** over 2 weeks (from Wed 9 Jun).
- ✘ **4%** with **+742 flights** over 1 week (from Wed 16 June).
- ✘ **51%** of 2019 traffic levels on Wednesday 23 June.



Current traffic evolution



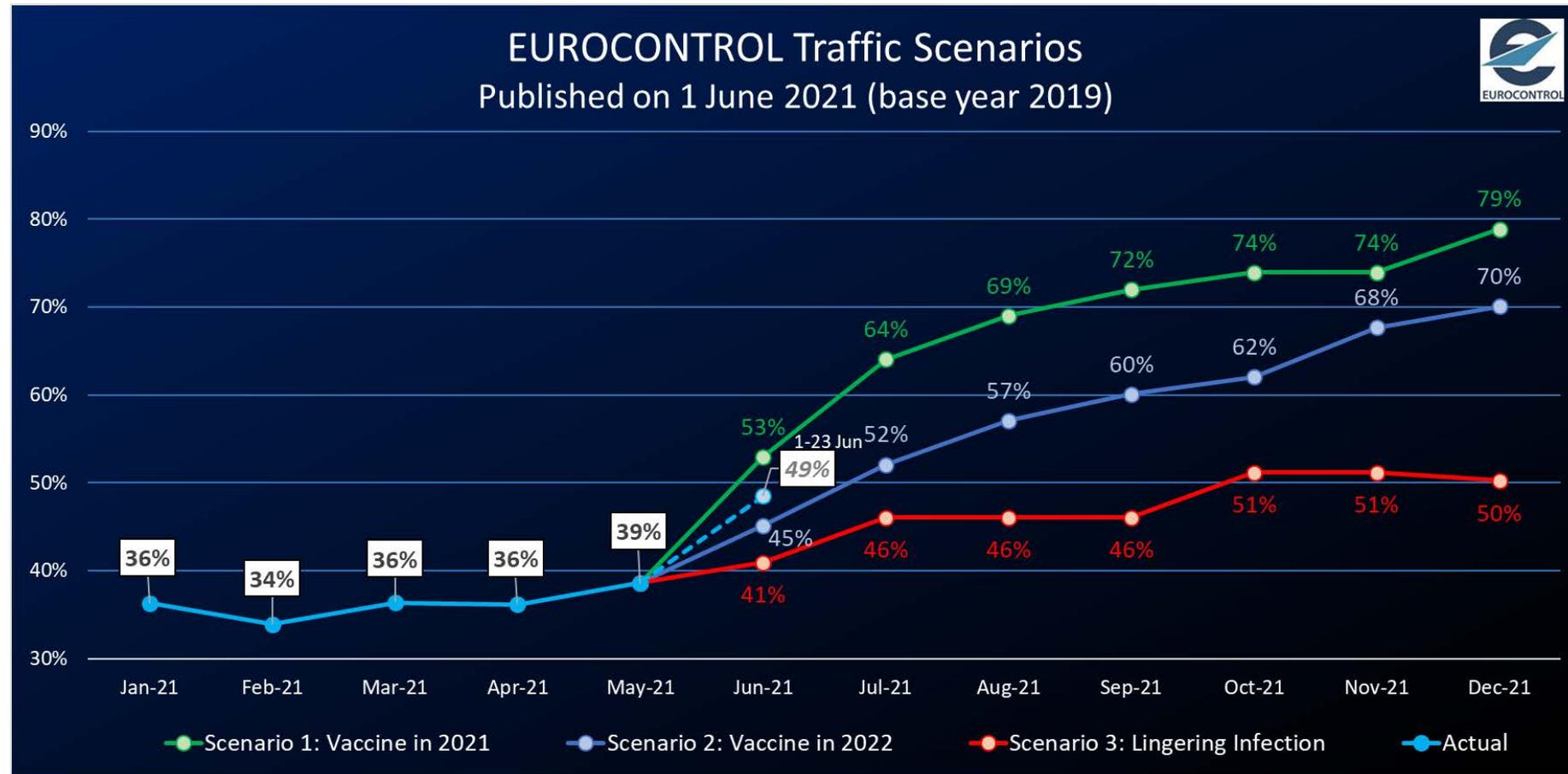
- ✘ The traffic has clearly been increasing over the last 7 weeks with a significant acceleration on 1st June with 2 digit increases.
- ✘ After having been stable since January at around -64% compared to 2019, the traffic has now reached -48% over the last week.

Current situation compared to the latest EUROCONTROL traffic scenarios



✘ **Traffic at 49%** on 1-23 June 2021 compared to 1-23 June 2019.

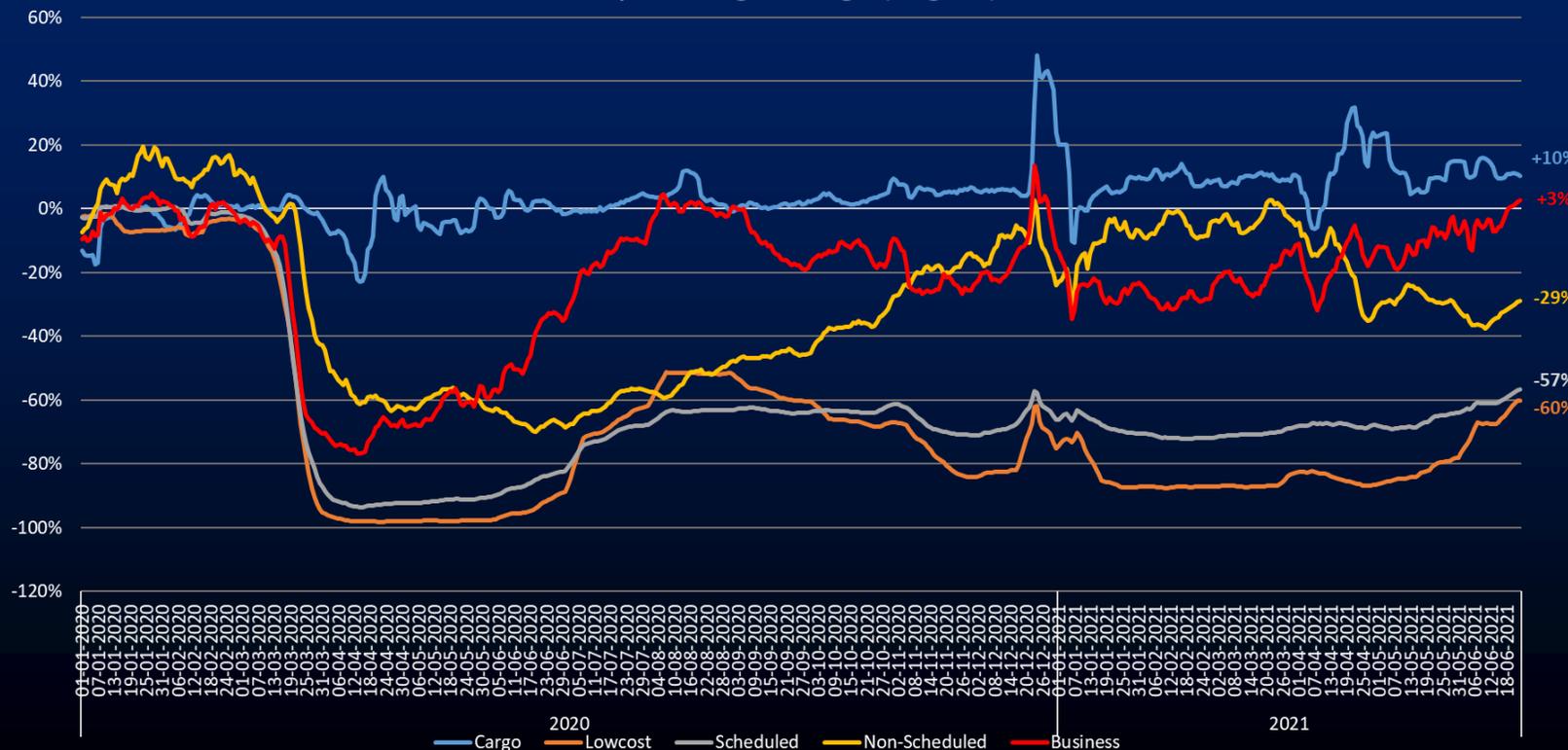
✘ This is in line with the latest EUROCONTROL traffic scenarios published on 1 June 2021.



Market Segments



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



On 23 June 2021, compared to 2019:

- ✘ **All-cargo** and **Business Aviation** are the only segment above 2019 levels with **+10%** and **+3%** respectively. Strong growth in business jet flights in Russia, Greece, across the Balkans and much of Eastern Europe.
- ✘ **Charter** decreased to **-29%** and decreasing since mid March.
- ✘ **Traditional** increased slightly to reach **-57%**.
- ✘ **Low-Cost** remains the most affected segment but has shown a significant rebound since 1st June reaching **-60%** vs 2019.

Aircraft operators (Daily flights)

Top 10



Rank evolution over 2 weeks	Top 10 Aircraft Operators on Wed 23-06-2021				
	Aircraft Operator	Flights	Δ over 2 weeks	% over 2 weeks	% vs 2019
→	Ryanair	1332	↗ +322	+32%	↘ -48%
→	Turkish Airlines	947	↗ +111	+13%	↘ -35%
→	Air France	656	↗ +124	+23%	↘ -52%
→	Lufthansa	525	↗ +84	+19%	↘ -68%
→	KLM	449	↗ +58	+15%	↘ -52%
↗	Pegasus	413	↗ +80	+24%	↘ -15%
↘	Wideroe	354	↗ +8	+2%	↗ +1%
↗	Vueling	347	↗ +108	+45%	↘ -52%
↗	Wizz Air	344	↗ +106	+45%	↘ -48%
↘	DHL Express	290	↘ -10	-3%	↗ +4%

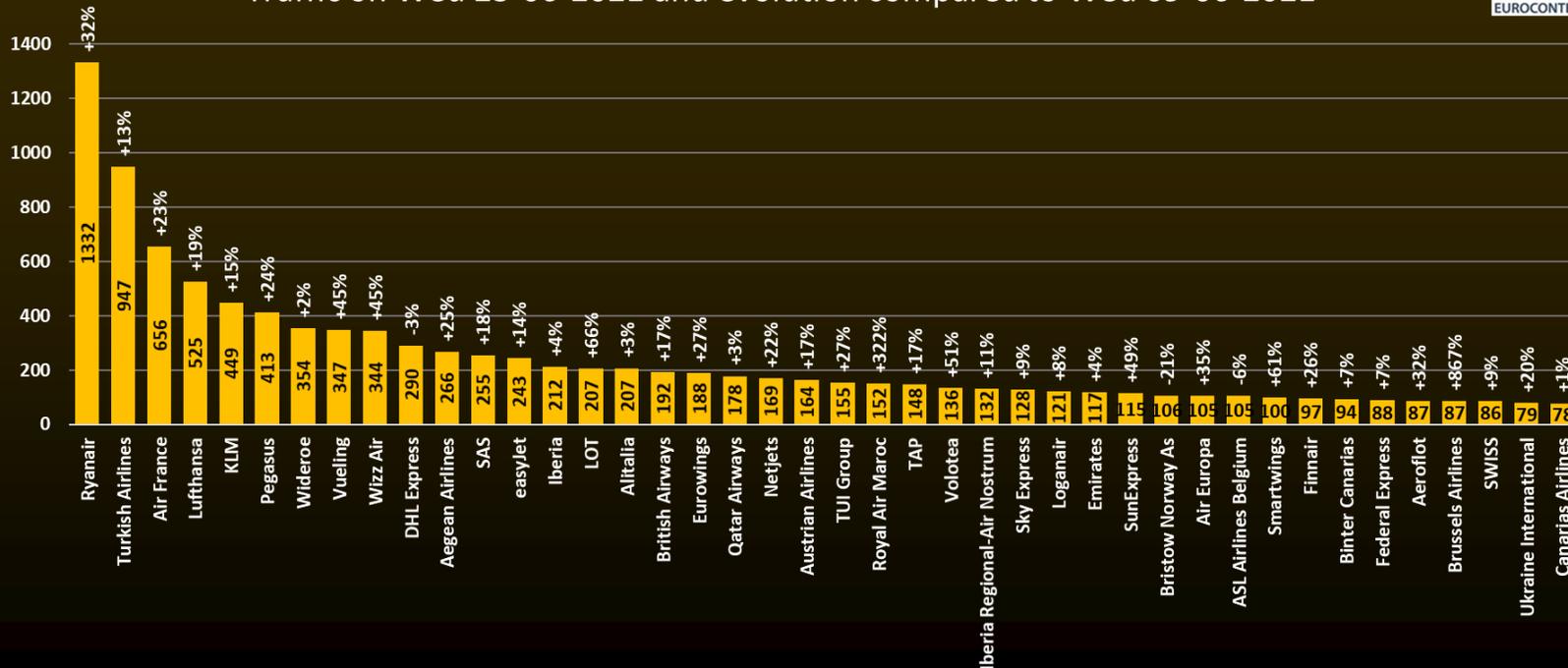
- ✈ **Ryanair** is the busiest airlines with 1,332 flights.
- ✈ Positive change in the ranking over 2 weeks for **Pegasus, Vueling** and **Wizz Air**.
- ✈ **Highest increase** in flights over 2 weeks for:
 - **Ryanair** (+32%) driven by many flows like Spain-UK, domestic Italy, domestic Spain and flows from/to Morocco.
 - **Air France** (+23%) driven mainly by flows France-Morocco, and flows from/to Mediterranean States,
 - **Turkish Airlines** (+13%) driven by domestic flows and flows from/to Russia.

Aircraft operators (Daily flights)

Top 40 – Latest operations



Aircraft operators
Traffic on Wed 23-06-2021 and evolution compared to Wed 09-06-2021

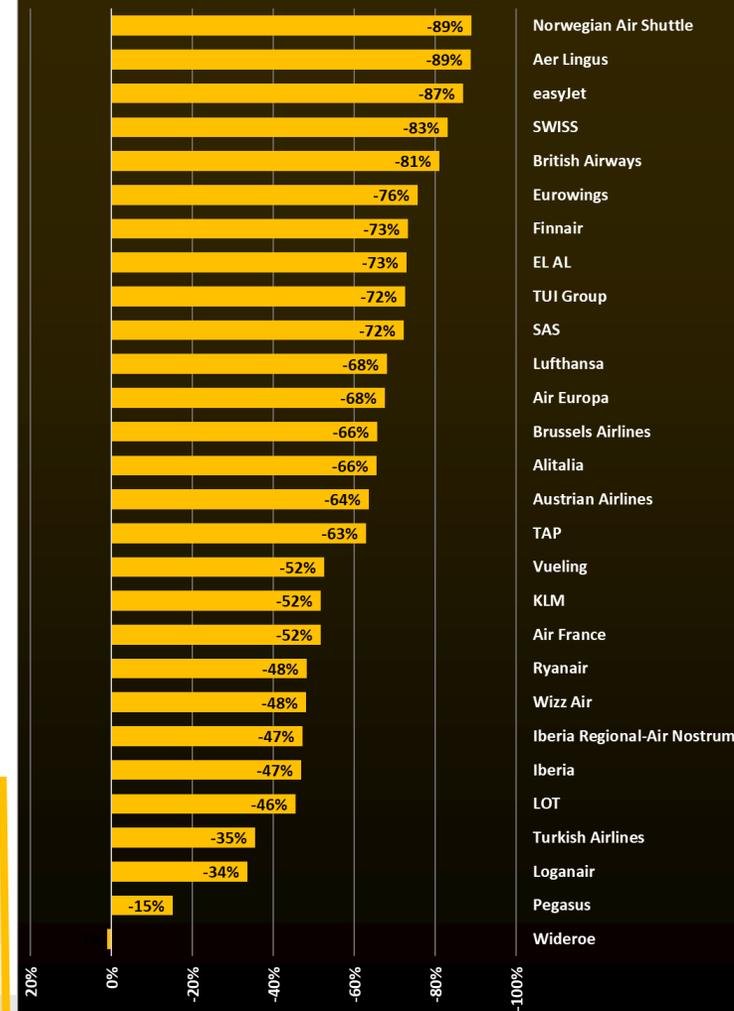


✘ Largest increases in flights for **Ryanair (+32%)**, **Turkish Airlines (+13%)**, **Air France (+23%)**. Largest changes for **Brussels Airlines (+867%)**(resuming pax operations on Wednesdays), **Royal Air Maroc (+322%)**(ease of travel for Moroccans returning home), **Smartwings (+61%)** and **Volotea (+65%)**.

✘ Ryanair 1st, Wizz Air 9th, easyJet 13rd and British Airways 17th.

✘ Traffic levels ranging from -89% (Norwegian) to +2% (Wideroe) compared to 2019.

Aircraft Operators in EUROCONTROL Network
(compared with equivalent days in 2019)
Daily Variation (IFR Flights) - Wed 23 Jun 2021



Aircraft operators

Latest news



European airlines

- ✘ **Air France** plans to increase capacity to 65% of 2019 levels in July/August, up from 40% in May.
- ✘ **Air France** and SNCF extend their 'Train + Air' collaboration to an additional 7 routes.
- ✘ **Brussels Airlines** plans to offer this summer 70% of 2019 capacity (60% short-medium, 77% long-haul).
- ✘ **easyJet** opens a new seasonal base at Faro airport.
- ✘ **Finnair** defers delivery of 3 A350s and postpone its narrow body renewal strategy.
- ✘ **Lufthansa** plans to increase Frankfurt – Tokyo Haneda frequency to daily and switch aircraft from A350 to 747-8 from 1 July.
- ✘ **Ryanair** takes delivery of first of 12 737 MAX aircraft with 50 more to come in the next year; opens base at Turin with 2 aircraft.
- ✘ **SAS** to serve over 50 destinations in the summer, with route resumptions from Stockholm to Bologna, Dubrovnik, Lisbon, Naples, Olbia, Palermo, Pisa, Pula & Rhodes.
- ✘ **Stobart Air** goes into liquidation and ceases operations; Aer Lingus to operate some routes for next month.
- ✘ **SWISS** reports that it will reduce its fleet by 15% (including 5 long haul) and its workforce by 20%; expects summer capacity to be 50-55% of 2019 levels.

- ✘ **Turkish Airlines** reports May passenger numbers 63.6% down on May 2019.
- ✘ **Wizz Air** plans to establish a base at Naples Capodichino airport in August, with 2 A321s and 18 new routes; expects to reach 100% of its 2019 capacity by the end of August.

Worldwide airlines

- ✘ **Air Canada** recalling over 2,600 employees during June and July.
- ✘ **American Airlines** is reported to be planning to cancel 950 flights in the first half of July due to a pilot shortfall.
- ✘ **Cathay Pacific** and Airbus investigating single pilot operations during high altitude cruise on the A350.
- ✘ **Emirates** reports a net loss of \$5.5 billion for the year to end March; planning to serve 124 destinations in July (almost 90% of its pre-COVID network) and to activate 30 A380s this summer.
- ✘ **Qatar Airways** resume passenger services to Heathrow & Edinburgh.
- ✘ **South African Airways** – preferred strategic equity partner selected by SA Government.

States (Daily Departure/Arrival flights)

Top 10

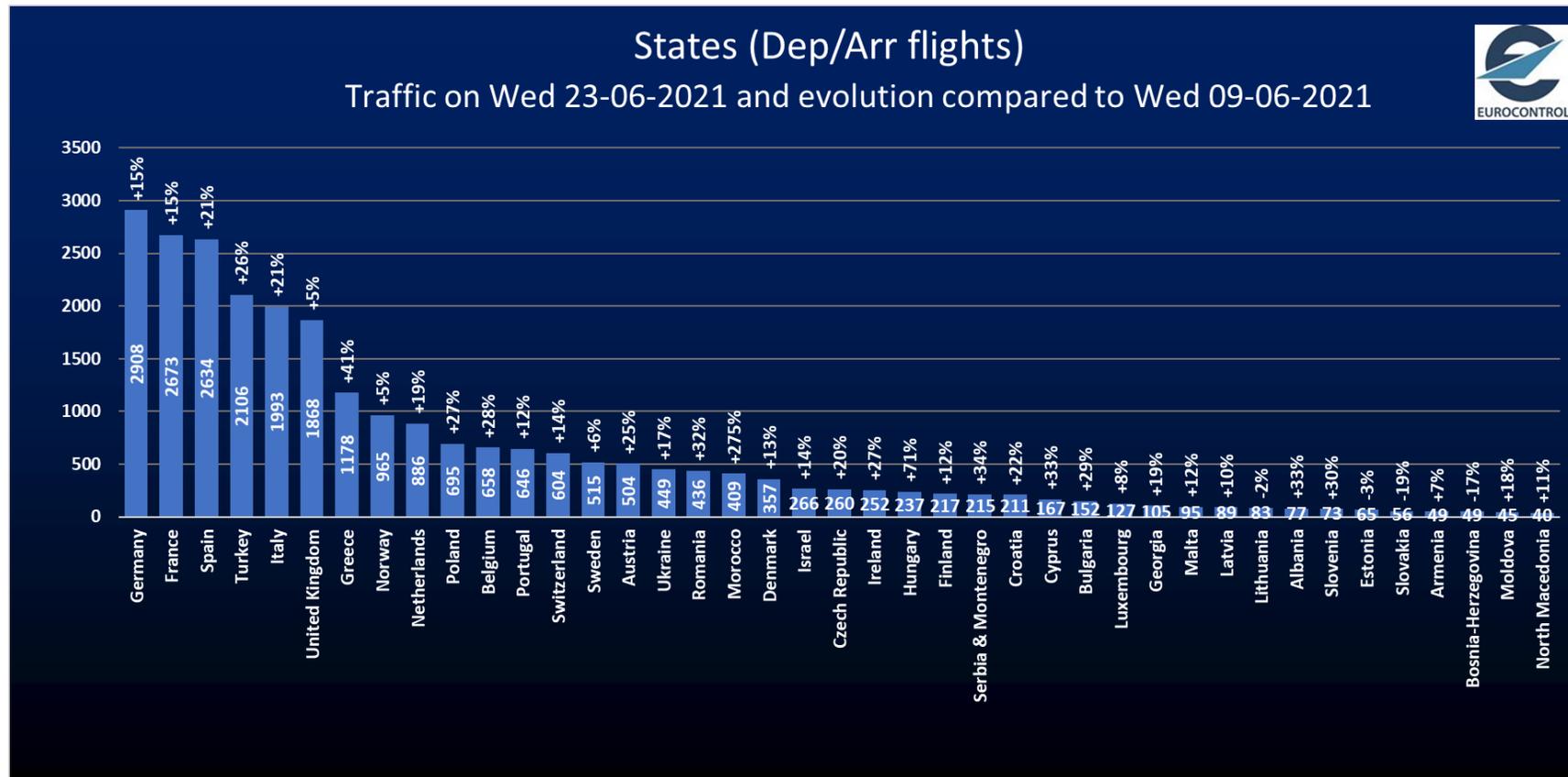


Rank evolution over 2 weeks	Top 10 States on Wed 23-06-2021				
	State	Flights (Dep/Arr)	Δ over 2 weeks	% over 2 weeks	% vs 2019
→	Germany	2908	↗ +390	+15%	↘ -56%
→	France	2673	↗ +346	+15%	↘ -48%
→	Spain	2634	↗ +452	+21%	↘ -51%
↗	Turkey	2106	↗ +440	+26%	↘ -39%
↗	Italy	1993	↗ +341	+21%	↘ -54%
↘	United Kingdom	1868	↗ +92	+5%	↘ -72%
↗	Greece	1178	↗ +345	+41%	↘ -40%
↘	Norway	965	↗ +49	+5%	↘ -43%
→	Netherlands	886	↗ +141	+19%	↘ -52%
↗	Poland	695	↗ +146	+27%	↘ -48%

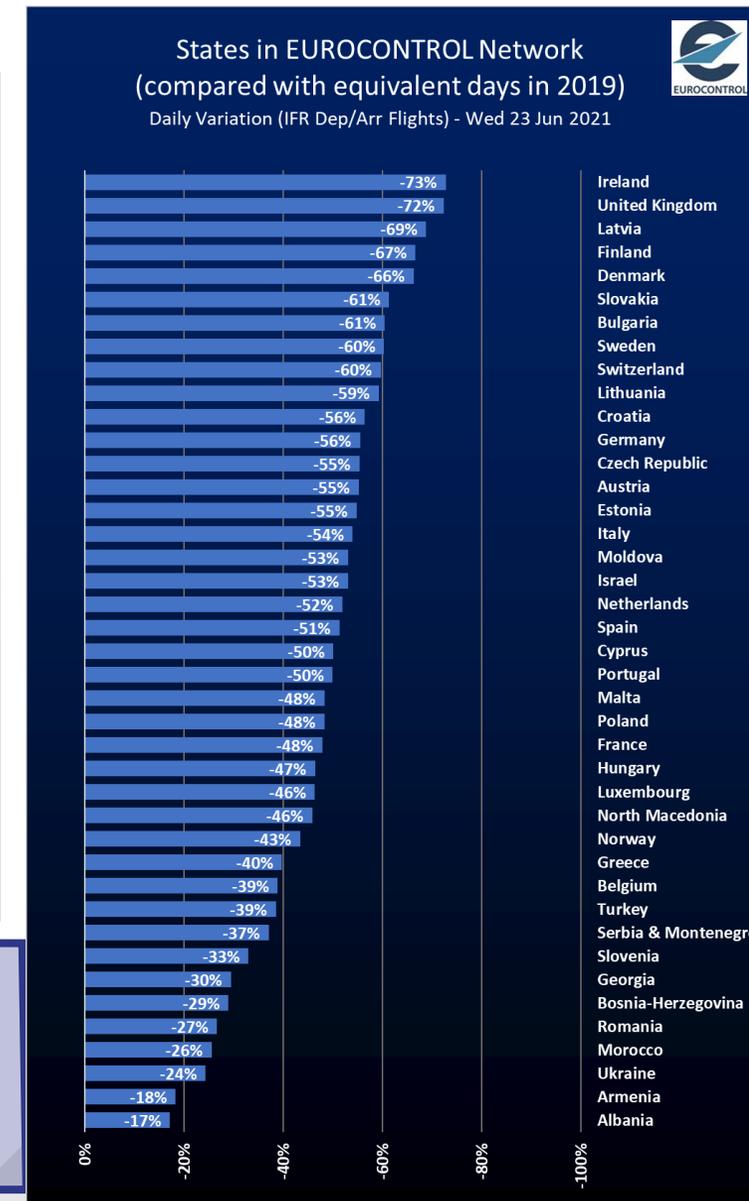
- ✳️ **Highest increases** in flights over 2 weeks:
 - **Spain** (+21%) mainly driven by Ryanair and Vueling. Domestic flows and Morocco-Spain, France-Spain, Netherlands-Spain.
 - **Turkey** (+26%) mainly driven by Turkish Airlines and Pegasus. Domestic flows and Russia-Turkey or Germany-Turkey.
 - **Germany** (+15%) mainly driven by Lufthansa and light aircraft operators. Domestic flows, Germany-Turkey and Germany-Greece.
 - **France** (+15%) mainly driven by Air France and Royal Air Maroc. France-Morocco, France-Spain and France-Hungary.
 - **Italy** (+21%) mainly Ryanair and light aircraft operators. Domestic flows and France-Italy, Germany-Italy.

States (Daily Departure/Arrival flights)

Latest traffic situation



- ✦ Largest increases in flights for **Germany (+15%), France (+15%), Spain (+21%), Turkey (+26%), Italy (+21%)**. Highest growth for **Morocco (+275%)**—see previous slides.
- ✦ Traffic levels ranging from **-73% (Ireland)** to **-17% (Albania)** vs 2019.



Associations, Authorities, Industry and States



- ✘ **A4E** reports the cost of carbon allowances has more than doubled compared to pre-pandemic levels.
- ✘ **European Commission** decision on Condor state aid (€550 million) annulled by court following Ryanair complaint but effects suspended pending new decision.
- ✘ **IATA** states Travel Pass is to go live shortly following testing.
- ✘ **CAAC** reports at the end of 2020 China had 64 airlines (49 state-owned), 2 more than 2019; in May passenger numbers were 51 million, 6.4% down on 2019.

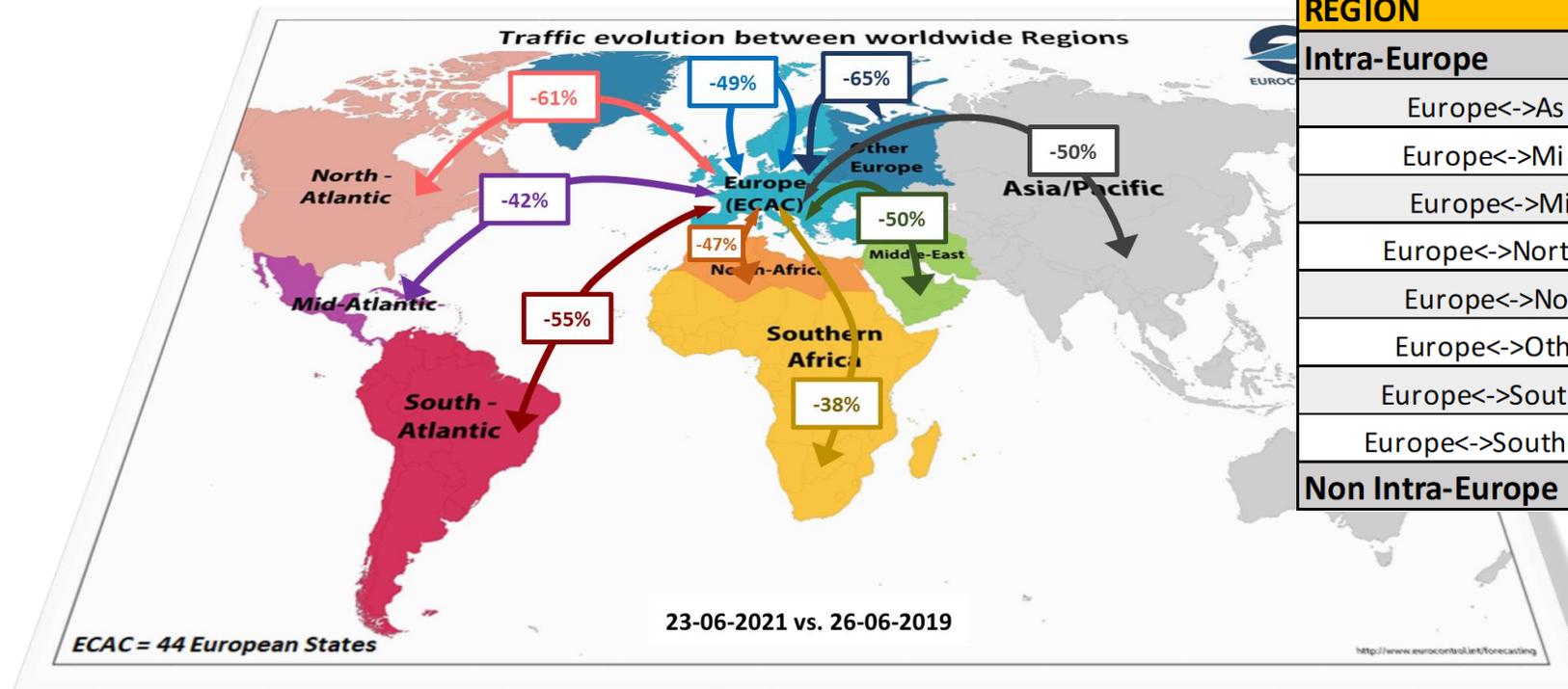
- ✘ **Airbus** delivered 50 aircraft in May, up from 45 in April.
- ✘ **Boeing** delivered 17 aircraft in May, including 10 737 MAX (up from 4 MAX's in April); conducts first test flight of the 737 MAX 10.
- ✘ **Rolls-Royce** to use SAF to power 10% of its testing/development activities by 2023.

- ✘ **Russia** resuming reciprocal air traffic with Belgium, Bulgaria, Cyprus, Ireland, Italy, Jordan, North Macedonia, Turkey & US and increasing traffic with 9 other countries.
- ✘ **US** and **EU** agree to resolve their large civil aircraft subsidy dispute.

Traffic flows (Daily Departure/Arrival flights)



- ✘ The main traffic flow is the intra-Europe flow with 14,353 flights on Wednesday 23 June, which is increasing (+15%) over 2 weeks.
- ✘ Intra-Europe flights are at -49% compared to 2019 while intercontinental flows are at -54%.



REGION	09-06-2021	23-06-2021	%	vs. 2019
Intra-Europe	12,512	14,353	+15%	-49%
Europe<->Asia/Pacific	414	412	-0%	-50%
Europe<->Mid-Atlantic	79	89	+13%	-42%
Europe<->Middle-East	680	775	+14%	-50%
Europe<->North Atlantic	547	568	+4%	-61%
Europe<->North-Africa	228	547	+140%	-47%
Europe<->Other Europe	301	457	+52%	-65%
Europe<->South-Atlantic	63	82	+30%	-55%
Europe<->Southern Africa	173	188	+9%	-38%
Non Intra-Europe	2,485	3,118	+25%	-54%

Country pairs (Daily Departure/Arrival flights)

Top 10



Rank evolution over 2 weeks	Top 10 Country-Pair on Wed 23-06-2021				
	Country-Pair	Dep/Arr Flights	Δ over 2 week	% over 2 week	% vs 2019
↗	Spain <-> Spain	1042	↗ +171	+20%	↘ -23%
↘	France <-> France	991	↘ -44	-4%	↘ -28%
→	Turkey <-> Turkey	802	↗ +59	+8%	↘ -22%
→	Norway <-> Norway	751	↗ +17	+2%	↘ -14%
→	Italy <-> Italy	695	↗ +98	+16%	↘ -28%
→	United Kingdom <-> United Kingdom	571	↗ +6	+1%	↘ -51%
→	Germany <-> Germany	548	↗ +38	+7%	↘ -50%
→	Greece <-> Greece	395	↗ +69	+21%	↘ -11%
→	Germany <-> Spain	308	↗ +20	+7%	↘ -52%
→	Sweden <-> Sweden	210	↘ -17	-7%	↘ -49%

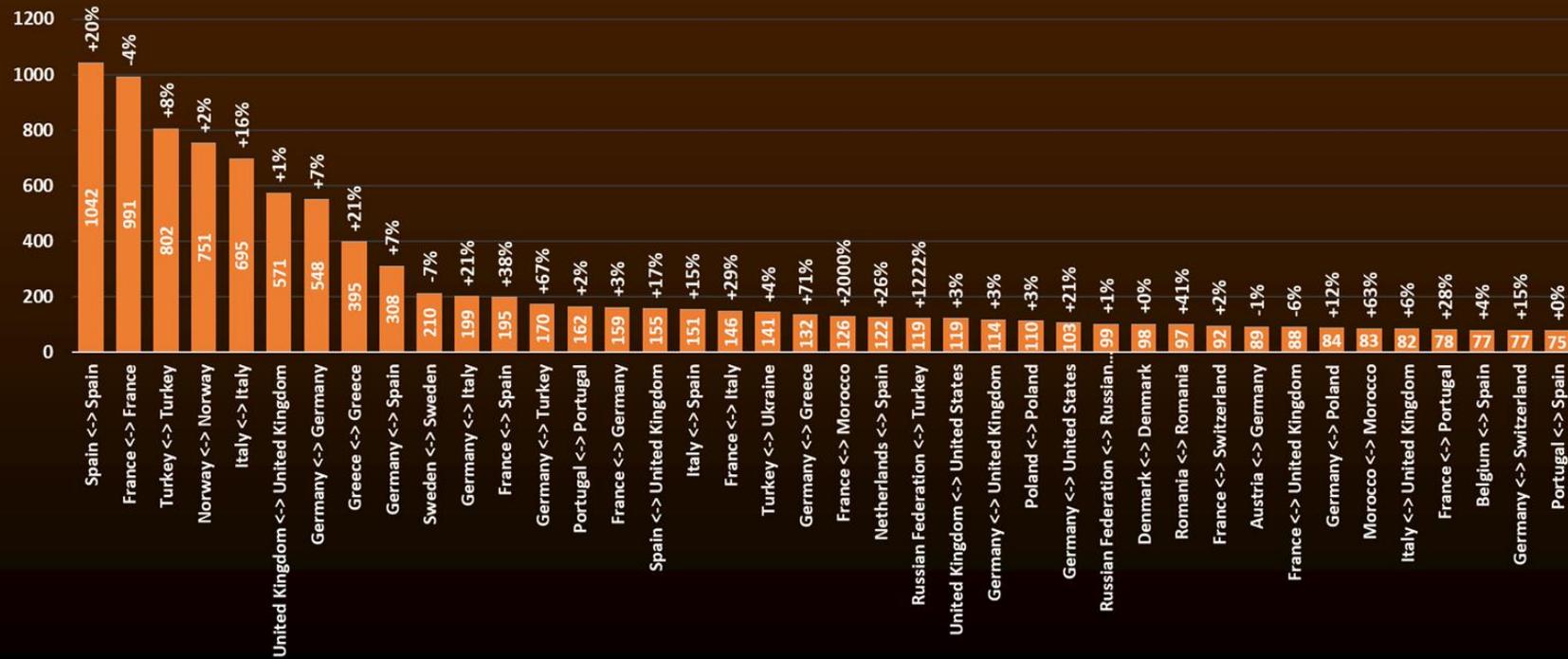
- ✘ 9 of the top 10 flows are domestic.
- ✘ **Highest increases** in flights over 2 weeks for domestic flows in:
 - **Spain** (+20%) mainly due to Vueling, Air Europa, Volotea and Ryanair as well as biz jet operators (Gestair).
 - **Italy** (+16%) mainly due to Ryanair, Volotea, light AOs and easyJet.
 - **Greece** (+21%) mainly due to Olympic, Sky Express, light AOs and bizJet operators (Netjets).
 - **Turkey** (+8%) mainly due to Turkish Airlines, Pegasus, Sun Express and light AOs .
- ✘ **Small decline** (-4%) for domestic flights in **France** mainly due to light aircraft operators.

Country pairs (Daily Departure/Arrival flights)

Latest traffic situation



Top 40 Country-Pairs (Dep/Arr flights).
Traffic on Wed 23-06-2021 and evolution compared to Wed 09-06-2021



✖ Noticeable increases:

- **Russia-Turkey** (119 flights, +1,222% over 2 weeks), especially flows Moscow-Antalya due to a relaxation at the Russian end of restrictions on the movement of citizens.
- **France-Morocco** (126 flights, +2,000% over 2 weeks) as, from mid-June, Moroccan authorities eased travel for Moroccans returning home (low fares for individuals and families).

Outside Europe

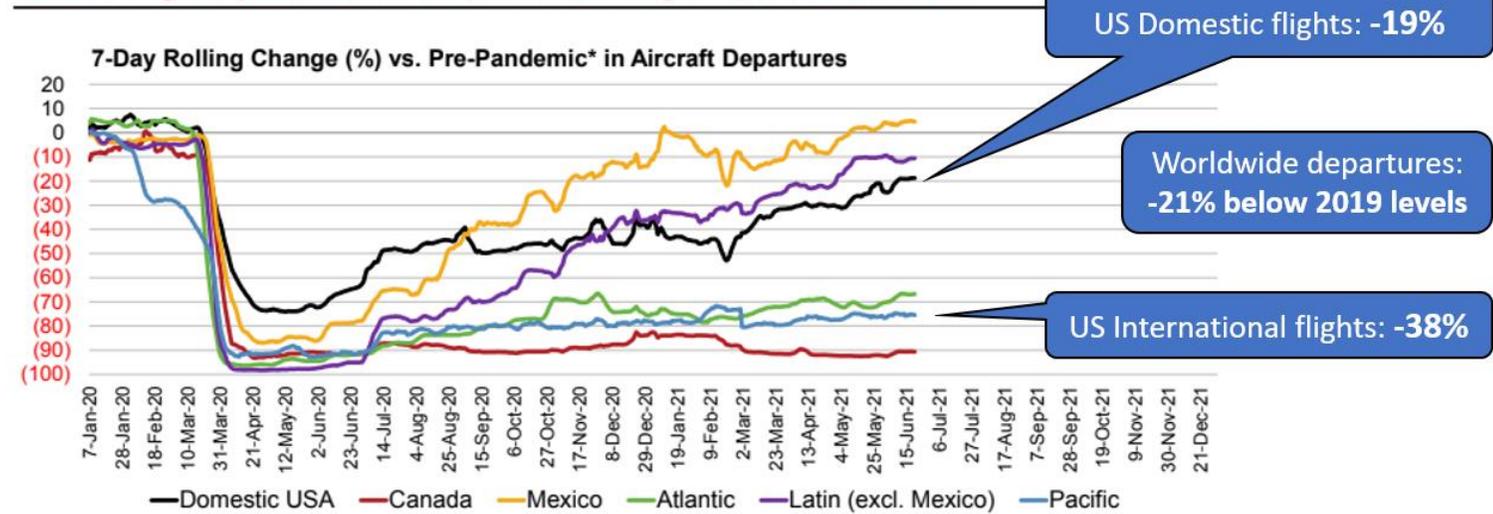


USA

- ✘ Bookings are improving but demand for corporate and long-haul international air travel are lagging.
- ✘ On 22 June, US passenger airline departures were 21% below 2019 levels with domestic down 19% and international down 38%.
- ✘ The domestic US load factor is closing in on pre-pandemic levels to around 87%.
- ✘ 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 21% Below Pre-Pandemic Levels
 Domestic Flights Operated Down 19%, International Flights Operated Down 38%



Source: A4A member passenger airlines and branded code share partners

* "Pre-pandemic" precedes March 1, 2020

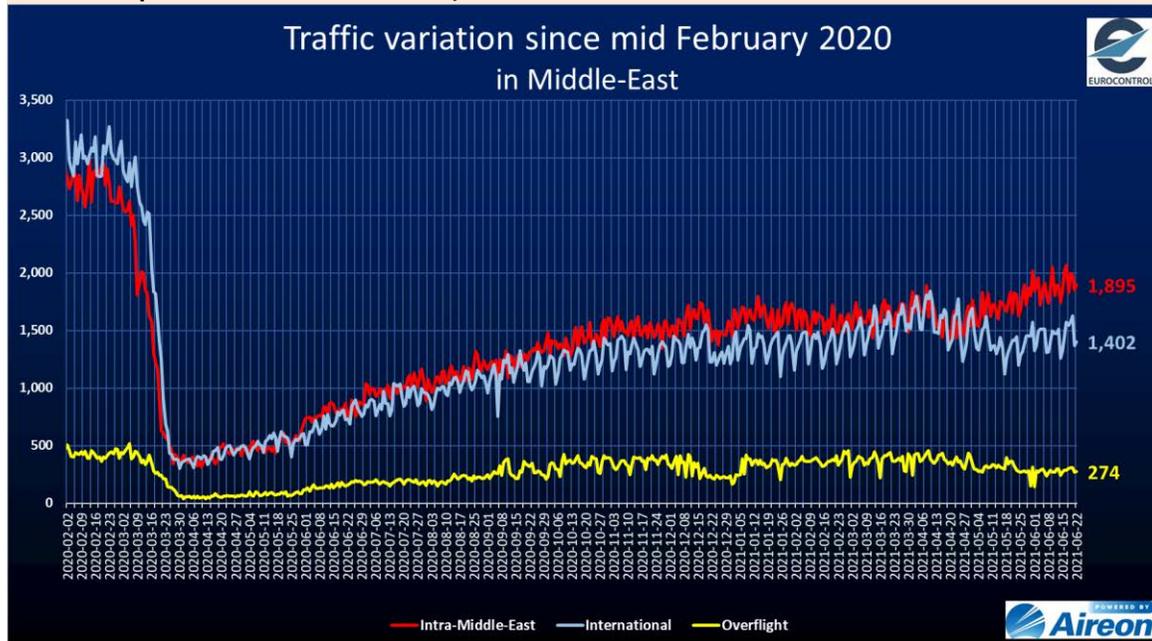


Outside Europe



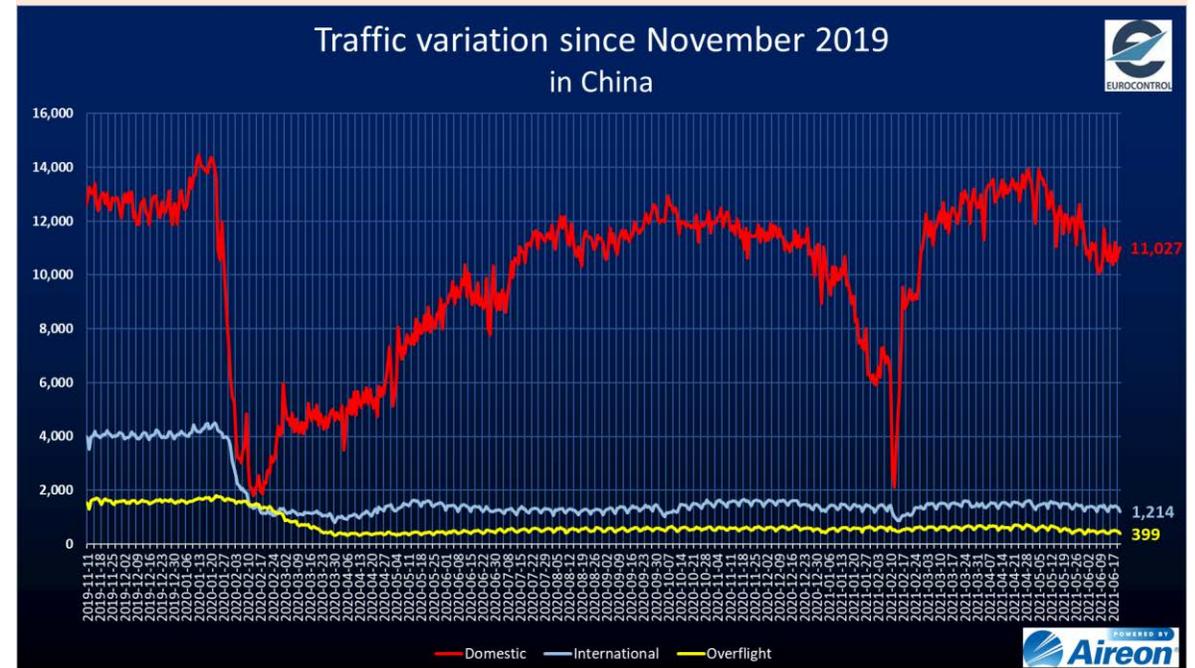
Middle East

- ✘ Intra-Middle-East traffic recorded around 1,895 daily flights on 22 June (-32% compared to Feb 2020).
- ✘ On 22 June, international traffic from and to Middle-East recorded 1,402 flights (-54% compared to Feb 2020).
- ✘ Overflights have slightly increased to 274 flights (-36% compared to Feb 2019) over the recent weeks.



China

- ✘ On 21 June, domestic traffic recorded 11,027 flights (-7% compared to January 2020 levels), starts recovering after COVID-19 surge in early June in Guangzhou.
- ✘ International flights and overflights remain suppressed, they were stable on previous weeks with 1,214 and 399 flights respectively (-70% and -75% vs 1 Jan 2020).



Airports (Daily Departure/Arrival flights)

Top 10 and latest news



Rank evolution over 2 weeks	Top 10 Airports on Wed 23-06-2021				
	Airport	Dep/Arr Flights	Δ over 2 weeks	% over 2 weeks	% vs 2019
→	IGA Istanbul Airport	726	↗ +89	+14%	↘ -43%
↗	Paris/Charles-De-Gaulle	668	↗ +108	+19%	↘ -56%
→	Amsterdam	660	↗ +97	+17%	↘ -56%
↘	Frankfurt	655	↗ +77	+13%	↘ -58%
→	Madrid/Barajas	613	↗ +86	+16%	↘ -53%
↗	Athens	564	↗ +119	+27%	↘ -26%
↘	Istanbul/Sabiha Gokcen	531	↗ +61	+13%	↘ -21%
↗	Antalya	483	↗ +202	+72%	↘ -46%
→	Barcelona	471	↗ +89	+23%	↘ -57%
↘	London/Heathrow	452	↗ +28	+7%	↘ -67%

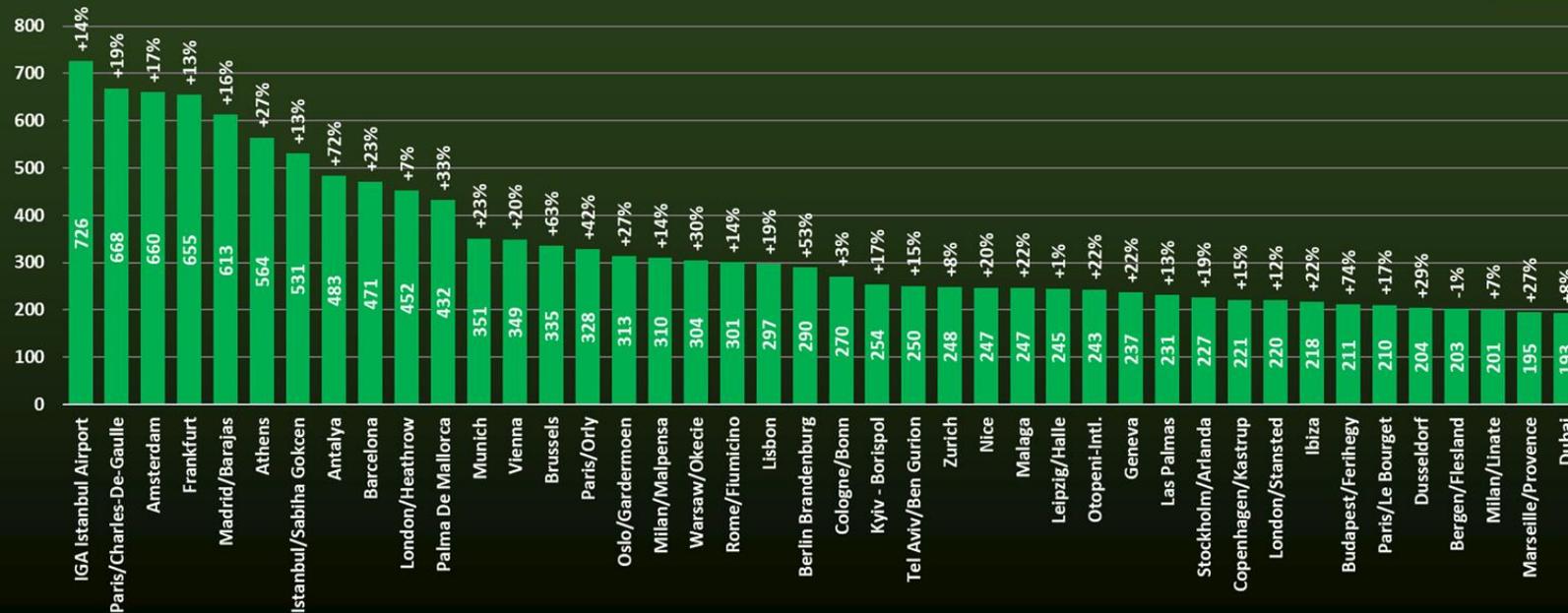
- ✘ Positive change for 3 of the top 10 airports over last 2 weeks.
- ✘ Highest increases in flights for:
 - **Antalya (+72%)**: mainly Sun Express, Pegasus and Azur Air & Nordwind Airlines (Russian AOs).
 - **Athens (+35%)**: mainly Aegean and Olympic as well as biz Av operators. Domestic flows.
 - **Paris CDG (+19%)**: mainly Air France. Flows France-Morocco, France-Italy.
 - **Amsterdam (+17%)**: mainly KLM. Flows Netherlands-Spain, Netherlands-Italy.

Airports (Daily Departure/Arrival flights)

Latest operations



Top 40 Airports (Dep/Arr flights)
Traffic on Wed 23-06-2021 and evolution compared to Wed 09-06-2021



✂ Largest increases in flights for **Antalya (+72%)**, **Brussels (+63%)**, **Athens (+27%)**, **Paris CDG (+19%)**, **Palma de Mallorca (+33%)**.

✂ Traffic levels ranging from -94% (Gatwick) to -26% (Athens) compared to 2019.

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

Daily Variation (IFR Dep/Arr Flights) - Wed 23 Jun 2021



Airports

Latest news

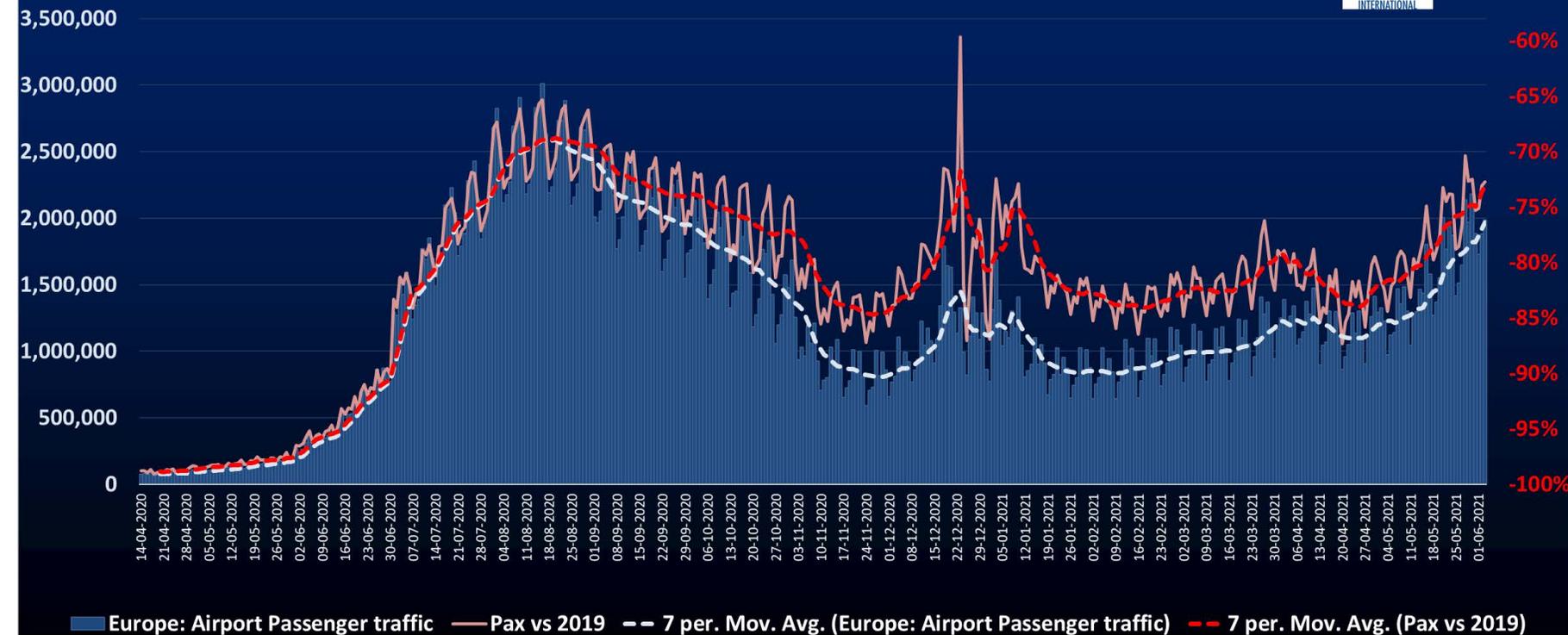


- ✘ **Aena** May passenger numbers in its Spanish airport network down 76.1% on May 2019.
- ✘ **Aéroports de Paris** May passenger numbers down 78.8% on May 2019.
- ✘ **Avinor** May passenger numbers down 77.0% on May 2019 (domestic -64.6%, international -96.1%).
- ✘ **Amsterdam Schiphol** May passenger numbers down 82.8% on May 2019.
- ✘ **Brussels Airport** May passenger numbers down 82.2% on May 2019.
- ✘ **Cape Town Airport** May passenger numbers down 47.2% on May 2019 (domestic -38.0%, regional -62.2%, international -84.2%).
- ✘ **Frankfurt Airport** May passenger numbers down 80.0% on May 2019.
- ✘ **Geneva** May passenger numbers down 83.6% on May 2019.
- ✘ **Manchester Airports Group** reports May passenger numbers down (on 2019) 95.4% for Manchester, 94.3% for Stansted and 99.6% for East Midlands; planning social media campaign protesting UK Government approach to reopening.
- ✘ **Montreal Airport** not expecting pre-COVID traffic levels until 2026-2028.
- ✘ **Munich Airport** May passenger numbers down 88.4% on May 2019.
- ✘ **Vienna Airport** reopens Terminal 1; May passenger numbers down 86.1% on May 2019.

Passengers



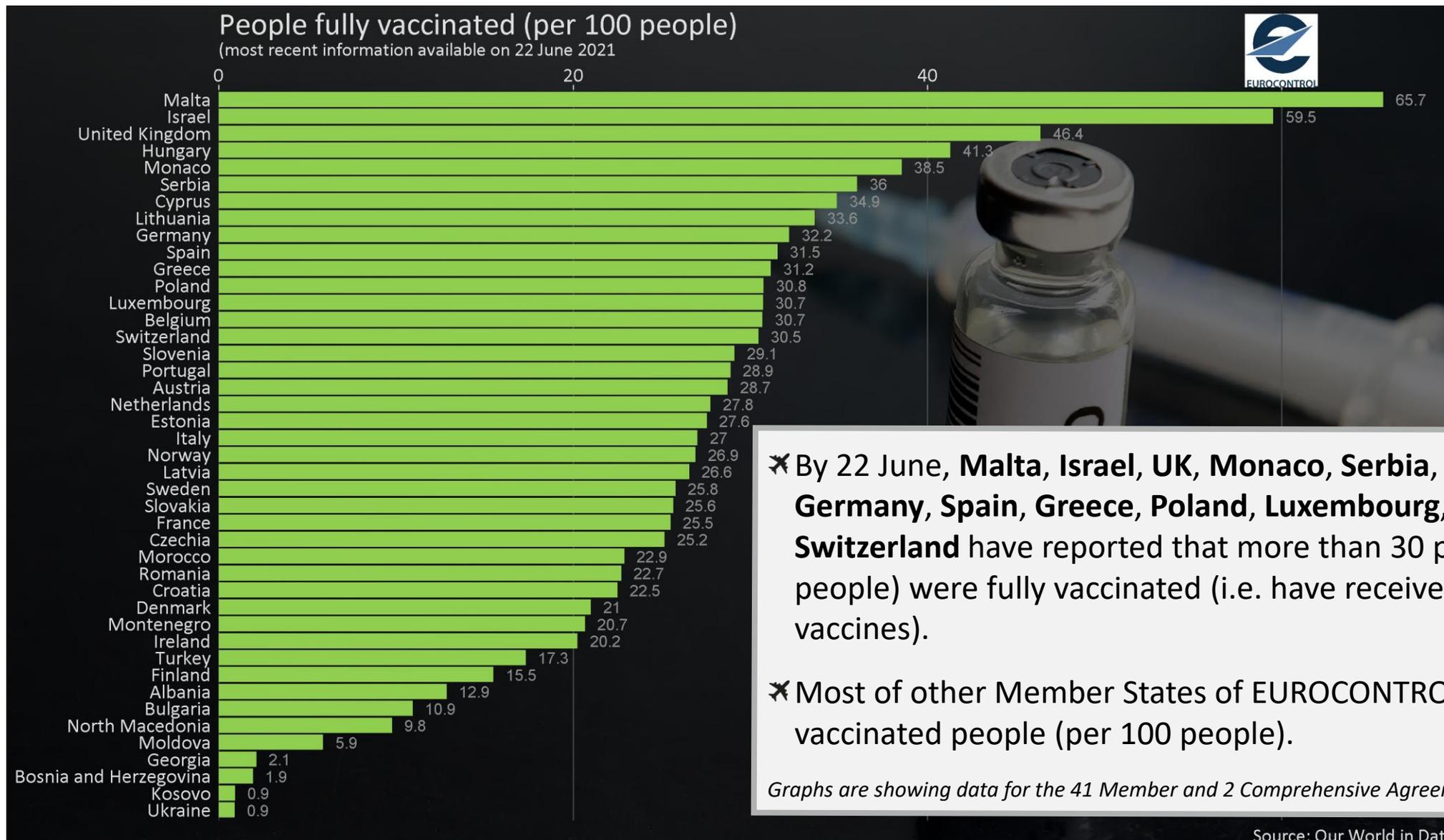
Europe: Airport Passenger Traffic
Comparison with 2019



- ✘ **ACI recorded just below 2 million passengers on 3 June 2021***, a **loss of 5.3 million passengers** compared to the equivalent day in 2019 (**-73%**).
- ✘ **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



✘ By 22 June, **Malta, Israel, UK, Monaco, Serbia, Cyprus, Lithuania, Germany, Spain, Greece, Poland, Luxembourg, Belgium and Switzerland** have reported that more than 30 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 25 fully vaccinated people (per 100 people).

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

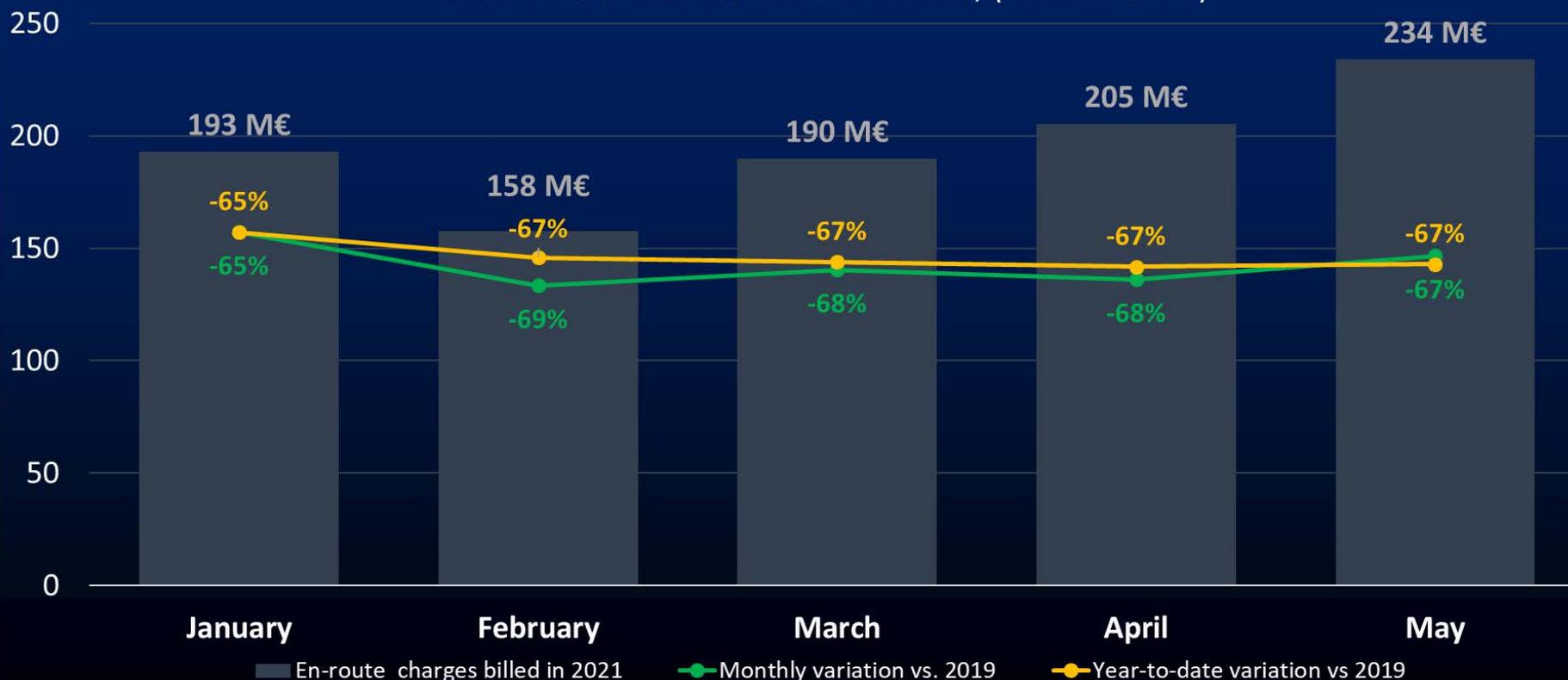
Source: Our World in Data

En-Route Air Navigation charges

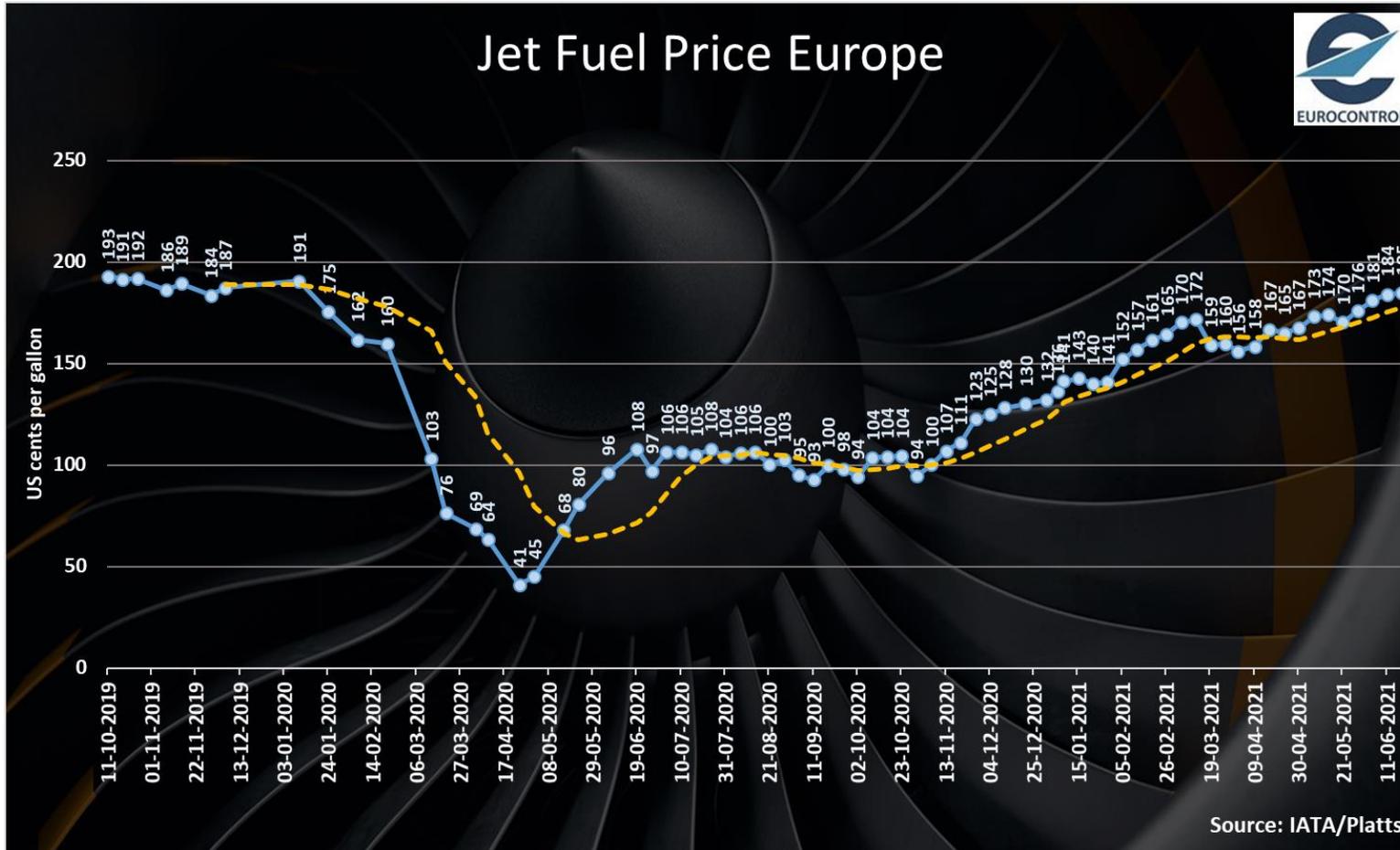


En-route air navigation charges at EUROCONTROL Network level

Year-to-date amount billed: 980 M€, (-67% vs 2019)



- ✘ **EUROCONTROL** has just billed **234M€** of en-route charges for May flights.
- ✘ This is **-67%** below the amount billed for the May 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 185 cts/gal on 18 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 (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.



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