2 September 2021

EUROCONTROL

COVID 19 **IMPACT ON** EUROPEAN AVIATION

EUROCONTROL Comprehensive Assessment

Headlines

- **24,586** flights (69% of 2019 levels) on Wed 1 September 2021, slight increase over 2 weeks (+2%).
- After a continuous increase since mid May, the traffic at network level stabilized early August and is slightly increasing since then. It reached its maximum on Friday 27 August 2021 with 26,773 flights (-27.7% vs 2019).
- Traffic in August was at 71% of 2019 levels.
- Ryanair is the busiest operator. Eurowings, BA, Norwegian Air Shuttle, SAS, Wideroe and Lufthansa added the most capacity over two weeks. Volotea, Loganair, Wizz Air and Pegasus are close or above to 2019 levels.
- Highest traffic increase for UK, Germany and France. Decrease for Greece.
- Highest increase by far for domestic flows in France, followed by Spain-UK, Germany-UK, Norway-Norway, Germany-Italy and France-UK. Decrease for Greece-Italy.
- Highest increase for Heathrow, Barcelona, Oslo, Milan/Linate and Madrid. Decrease for Palma, Ibiza and Athens.
- Domestic traffic vs 2019: Europe (-29%), US (-13%), China (-31%), Middle-East (-23%).
- En-route ATFM delays have started to rise since end June. Major contributors over the last 7 days: France (41% of all en-route ATFM delays), Greece (28%), Germany (11%), Spain (11%) and Croatia (6%).

Traffic Situation

EUROCONTROL

Daily flights (including overflights)

Traffic over the last 7 days is

↓29%

Compared to equivalent days in 2019

Top 10 Aircraft Operators

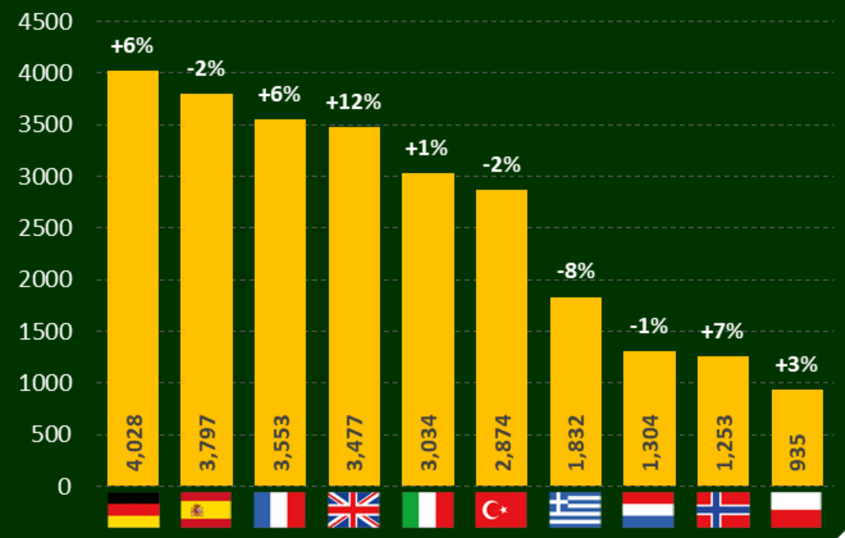
on Wed 01 September 2021 (daily flights)

1. Ryanair — Operated 2214 flights; ↓14% of same day in 2019; ↑0% over 2 weeks
2. Turkish Airlines — Operated 1234 flights; ↓16% of same day in 2019; ↓3% over 2 weeks
3. easyJet — Operated 1039 flights; ↓45% of same day in 2019; ↑1% over 2 weeks
4. Lufthansa — Operated 763 flights; ↓54% of same day in 2019; ↑5% over 2 weeks
5. Air France — Operated 755 flights; ↓42% of same day in 2019; ↓0% over 2 weeks
6. KLM — Operated 692 flights; ↓24% of same day in 2019; ↓4% over 2 weeks
7. Wizz Air — Operated 625 flights; ↓10% of same day in 2019; ↓2% over 2 weeks
8. Vueling — Operated 557 flights; ↓24% of same day in 2019; ↑2% over 2 weeks
9. Pegasus — Operated 492 flights; ↓6% of same day in 2019; ↓0% over 2 weeks
10. SAS — Operated 450 flights; ↓56% of same day in 2019; ↑11% over 2 weeks

Top 10 Busiest States

on Wed 01 September 2021

(Dep/Arr flights and variation over 2 weeks)



EUROCONTROL

Top 10 Busiest Airports

7-day average Dep/Arr flights on 26/8 – 1/9 August, compared to 2019

Top 10 Airports	Average per rolling week (26/08-1/9)	Average per rolling week (26/08-1/9) vs 2019
Amsterdam	1075	-28%
IGA Istanbul Airport	1016	-21%
Paris/Charles-De-Gaulle	955	-38%
Frankfurt	944	-38%
Madrid/Barajas	768	-37%
Antalya	760	-18%
Palma De Mallorca	718	-21%
Barcelona	715	-33%
Athens	690	-13%
London/Heathrow	689	-50%

Market Segments

On 01 Sep, compared to 2019

↓30% Low cost

↓41% Traditional

↑28% Business Aviation

↓ 9% Non-Scheduled/ Charter

↑ 7% All Cargo

Traffic Flow

On 1 September, **the intra-European** traffic flow was

19,946 flights

+3% over past **2 weeks**

-29% Compared to **2019**

Route charges

(July 2021)

Amount billed:

€ 471 million

Jan-Jul 2021 amount billed:

€ 1,771 million

vs. Jan-Jul 2019

↓ **(-61%)**

Source: EUROCONTROL

Economics

(27 August 2021)

Fuel price

↑ **188**

Cents/gallon

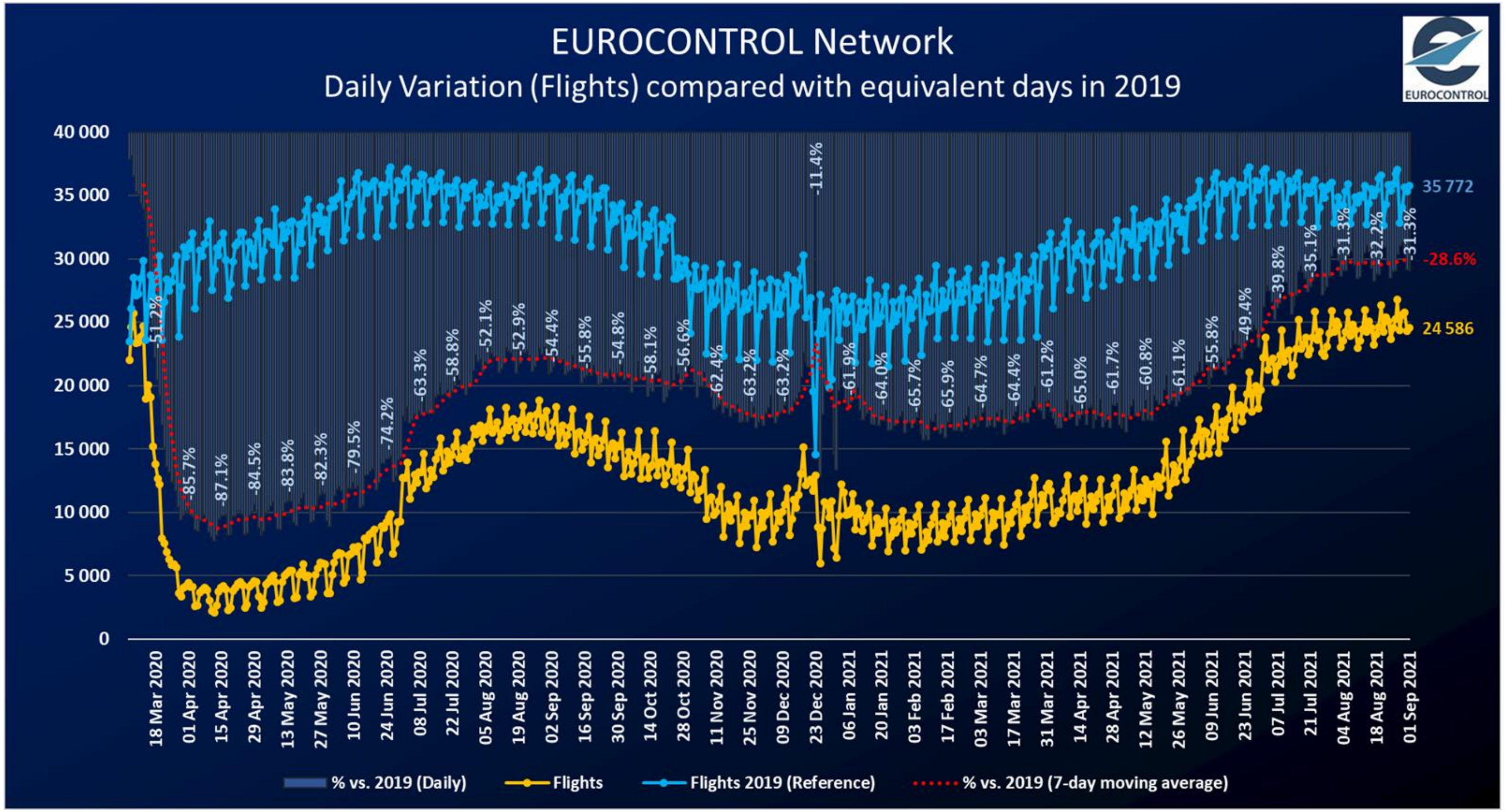
vs. 2019

compared to **183** cents/gallon on 06 August 2021

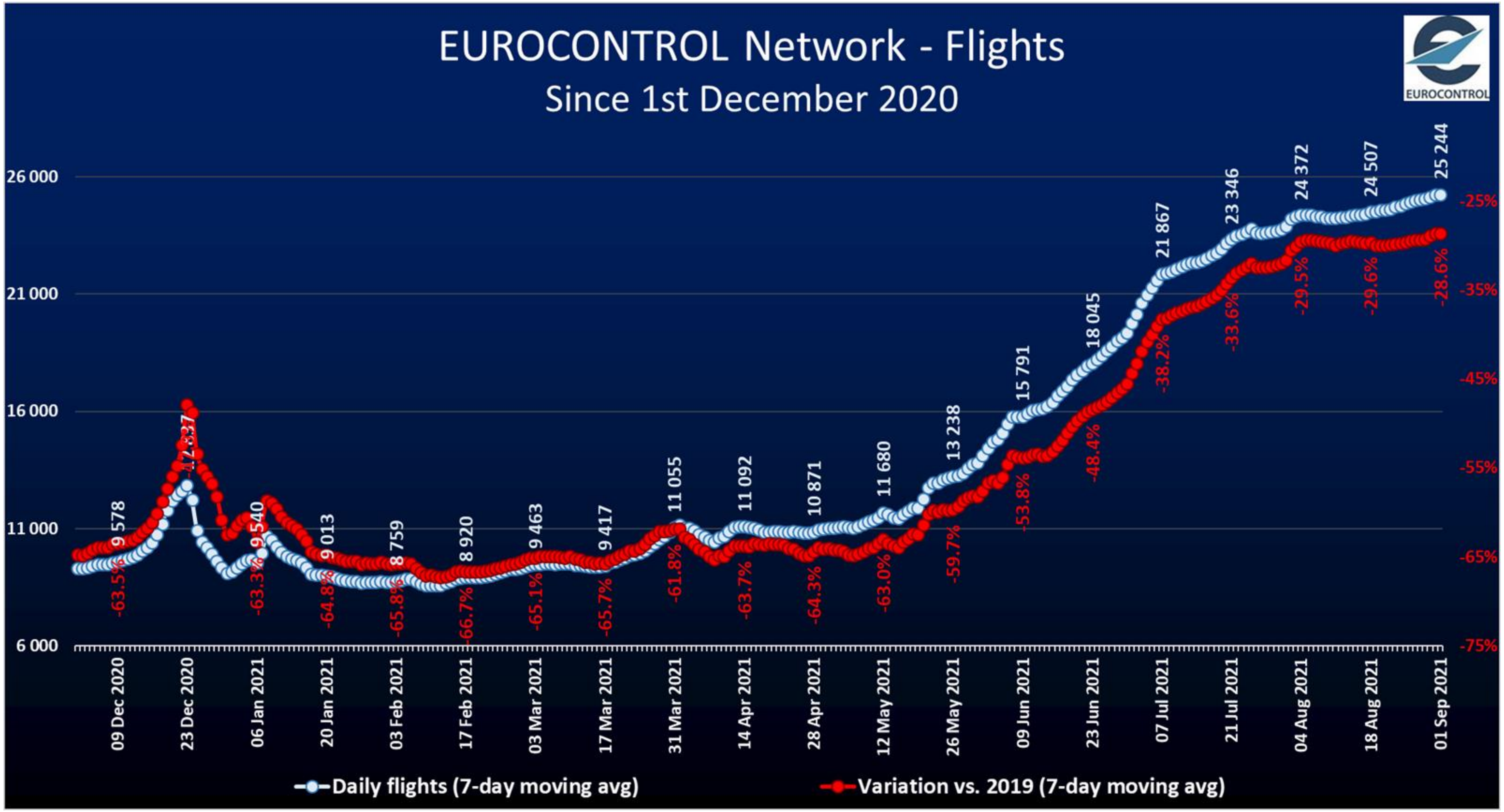
Source: IATA/Platts

Overall traffic situation at network level

- **24,586 flights** on Wednesday 1 September.
- **+2%** with **+524 flights** over 2 weeks (from Wednesday 18 August).
- **-0%** with **-4 flights** over 1 week (from Wednesday 25 August).
- **69%** of 2019 traffic levels.



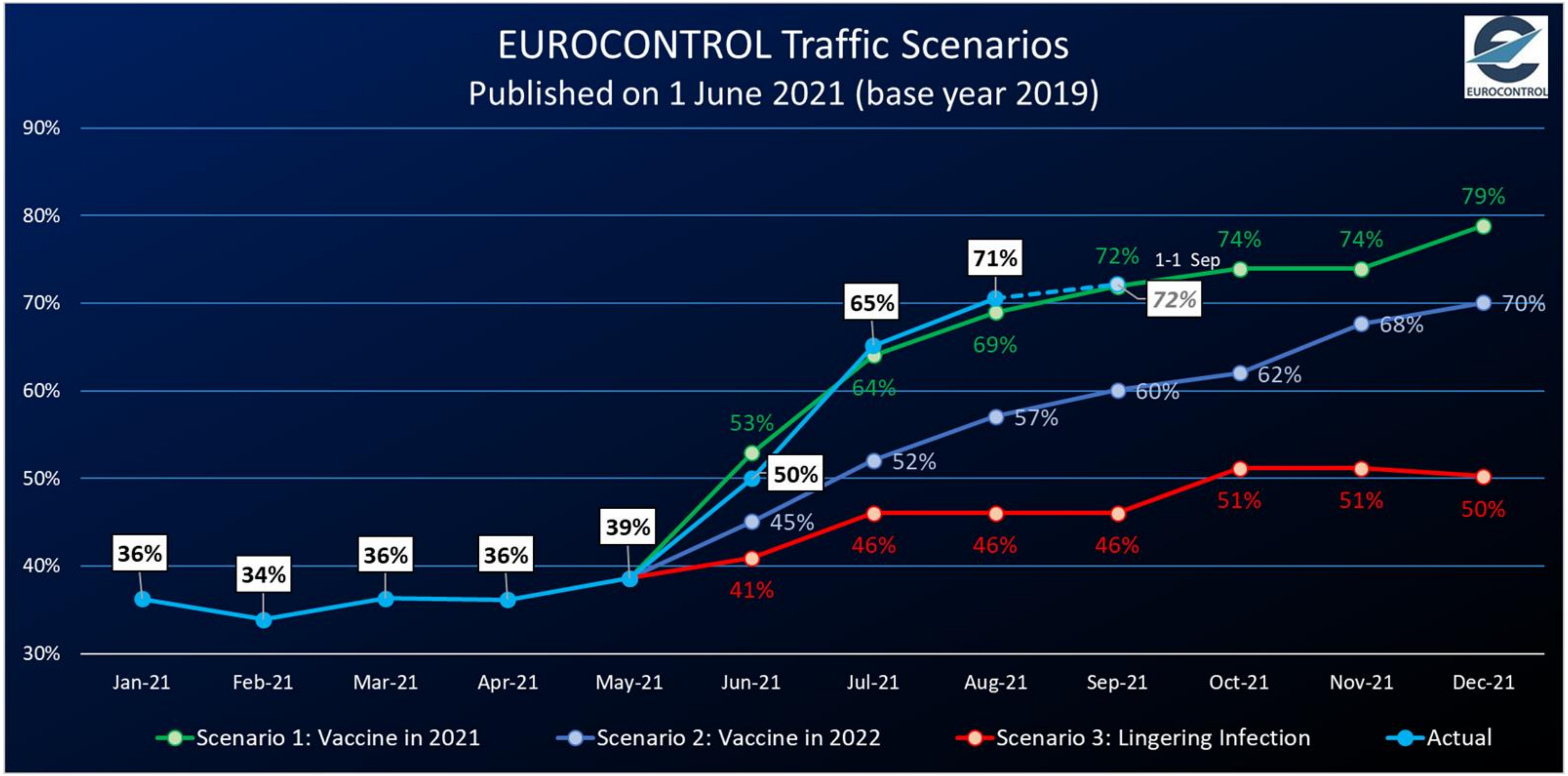
Current traffic evolution



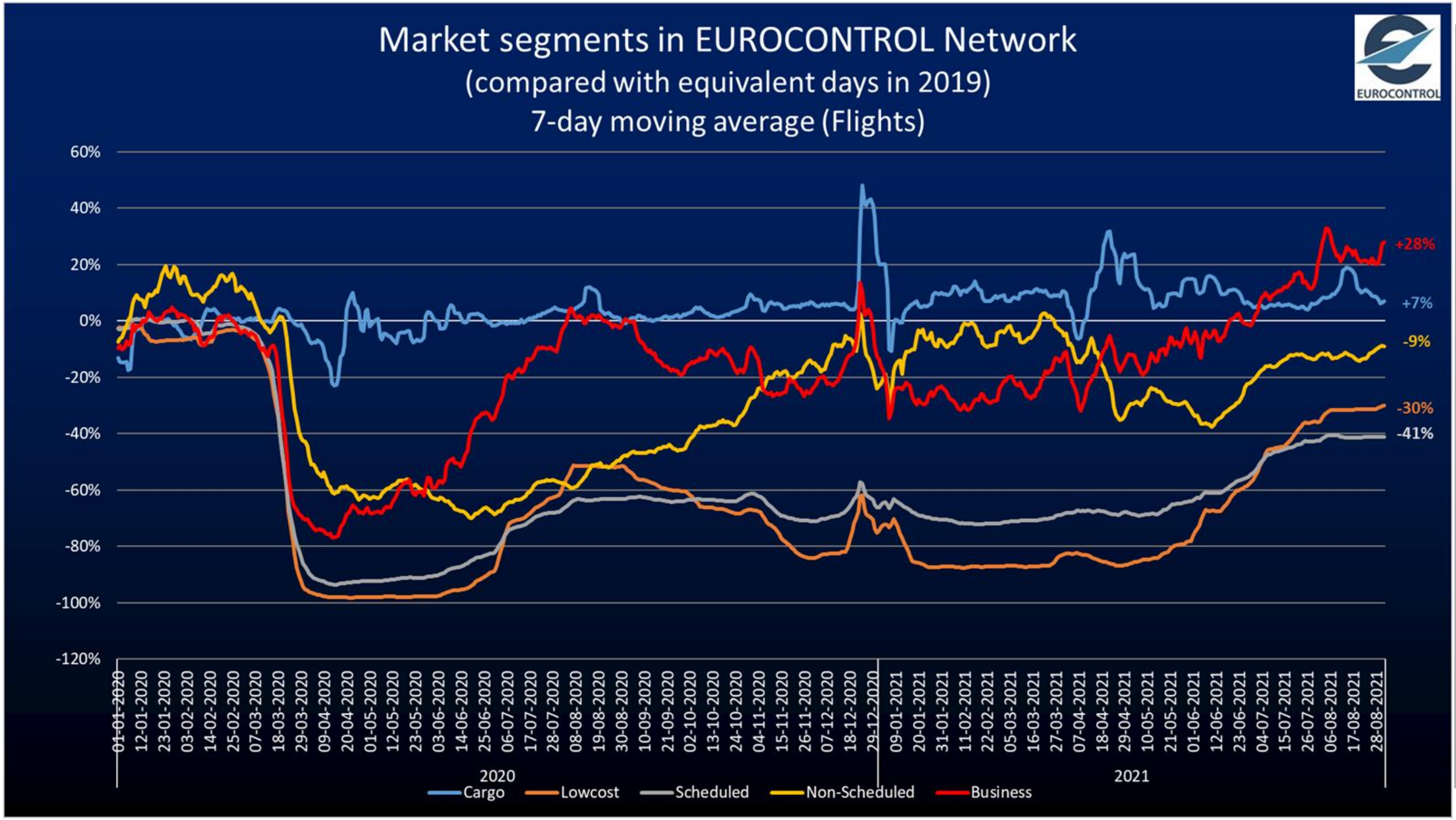
- After a continuous increase since mid May, the traffic at network level stabilized early August and is slightly increasing since then.
- It reached its maximum on Friday 27 August 2021 with 26,773 flights (-27.7% vs 2019).
- Since early August, the traffic at network level has stabilized at 70%-71% of 2019 levels.

Current situation compared to the latest EUROCONTROL traffic scenarios

- **Traffic** was at **71%** in August 2021 compared to August 2019.
- Since July, the network traffic is slightly above the most optimistic scenario of the latest EUROCONTROL traffic scenarios published on 1 June 2021.



Market Segments



On 1 September 2021, compared to 2019:

- **All-cargo** and **Business Aviation** are the only segments above 2019 levels with **+7%** and **+28%** respectively.
- **Charter** is stable at **-9%** vs 2019.
- **Traditional** and **Low-Cost** have consistently increased since May and have now stabilized at **-41%** vs 2019 for traditional and is slightly increasing at **-30%** for low-costs.

Aircraft operators (Daily flights)

Top 10

Rank evolution over 2 weeks	Top 10 Aircraft Operators on Wed 01-09-2021				
	Aircraft Operator	Flights	Δ over 2 weeks	% over 2 weeks	% vs 2019
→	Ryanair	2214	↗ +9	+0%	↘ -14%
→	Turkish Airlines	1234	↘ -44	-3%	↘ -16%
→	easyJet	1039	↗ +14	+1%	↘ -45%
↗	Lufthansa	763	↗ +38	+5%	↘ -54%
↘	Air France	755	↘ -3	-0%	↘ -42%
→	KLM	692	↘ -31	-4%	↘ -24%
→	Wizz Air	625	↘ -14	-2%	↘ -10%
→	Vueling	557	↗ +10	+2%	↘ -24%
→	Pegasus	492	↘ -2	-0%	↘ -6%
→	SAS	450	↗ +45	+11%	↘ -56%

Within the top 10, **highest increase** over 2 weeks for:

- **SAS** (+45 flights; +11%) mainly due to internal flows in Nordic countries.
- **Lufthansa** (+38 flights; +5%) mainly due to domestic flows and flows to UK and Italy

Highest decrease for:

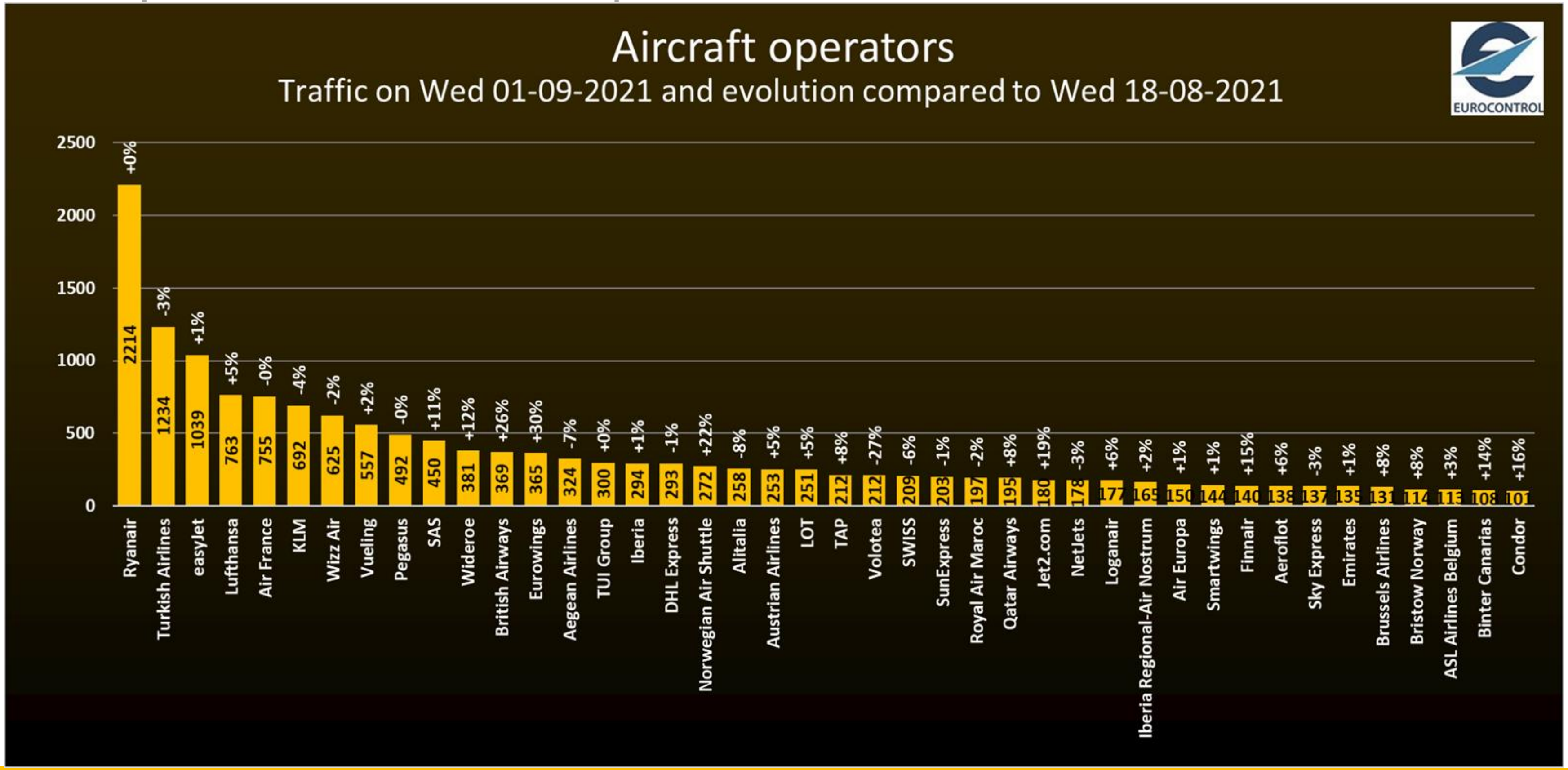
- **Turkish Airlines** (-44 flights; -3%) mainly due to domestic flows and flows to northern countries.
- **KLM** (-31 flights; -4%) mainly due to flows with Spain.

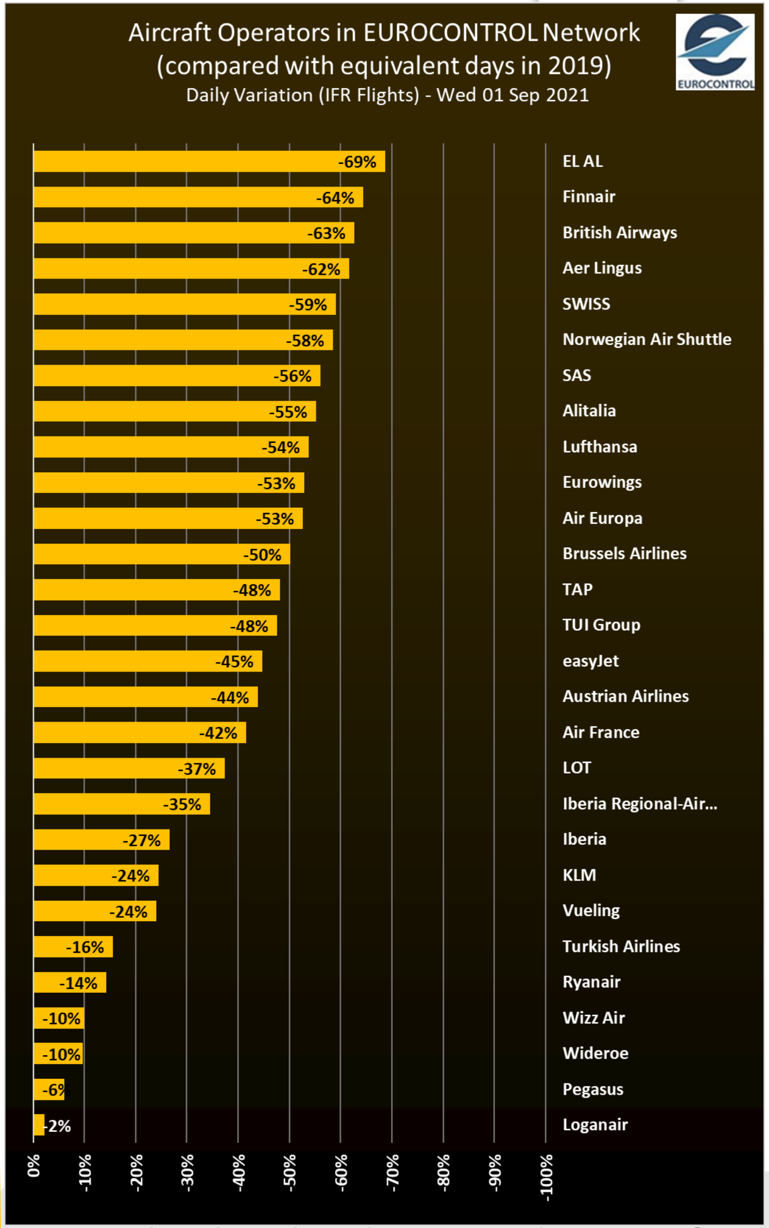
Pegasus (-6%) was close to 2019 flight volumes.

Increase in the ranking for Lufthansa.

Aircraft operators (Daily flights)

Top 40 – Latest operations





- Highest increase for **Eurowings** (+30%), **British Airways** (+26%), **Norwegian Air Shuttle** (+22%), **SAS** (+11%) and **Wideroe** (+12%). Hughest decrease for **Volotea** (-27%).
- Ryanair 1st, easyJet 3rd, Lufthansa 4th, Air France 5th, Wizz Air 7th, British Airways 12th.
- Traffic levels ranging from -69% (EL AL) to -2% (Loganair) vs 2019.

Aircraft operators
Latest news
European airlines

- **Air Montenegro** took delivery of its second aircraft, an E195.
- **British Airways** increases UK-India frequency from 10 to 20 times weekly, resumes 3 times weekly service to Phoenix; to resume services to Buenos Aires and Sao Paulo in October.
- **DHL** founds a new subsidiary – DHL Express Austria, to be based at Linz with 18 Boeing 757s.
- **Eurowings** plans to launch services from Prague in October (11 routes).
- **Iberia** increases frequency Madrid-Montevideo to 5 times a week, Madrid-San Jose (Costa Rica) to 7 times a week.
- **ITA** is awarded AOC by ENAC, permitting it to start selling tickets; targeting 15 October for transfer of operations from Alitalia; confirms that it will participate in the tender to acquire the Alitalia brand.
- **Norwegian** to operate 142 weekly frequencies to UK and Ireland in summer 2022.
- **Ryanair** to launch 6 services from Vilnius and Kaunas; 8 new routes from Poland; 2 new routes from Greece; 11 new routes from Germany; Kosice-Vienna service; 4 new routes from Budapest; 14 new services from the UK; 13 services from Morocco; 21 new services from Spain; three new services from Cyprus; to suspend all operations from Northern Ireland at the end of October.
- **SAS** releases its autumn timetable with 160 routes serving 60 destinations.
- **SWISS** to mandate vaccination for flying personnel from mid-November.
- **TAP Air Portugal** reports net loss for H1 2021 of €493 million; 722 employees left in Q2 following 580 leaving in Q1; labour workforce now 16% down on that at the end of 2020.
- **Turkish Airlines** to require proof of vaccination or a negative PCR test for domestic passengers, as a result of new government regulations.
- **Wizz** adding 6th aircraft and 4 new routes to Tirana base, 2nd aircraft and 7 new routes from Sarajevo from December; to close bases at Dortmund and Riga airports; resuming 6 services to/from/within Poland.

Worldwide airlines

- **Air Canada** to mandate vaccinations for all employees by the end of October.
- **Avianca** announces 23 new international services for H2 2021.
- **Cathay Pacific Group** reports 700M USD operating loss in H1 2021.
- **Delta** is hiring 1,500 flight attendants, in addition to another 1,500 that made it through hiring process before the pandemic hit.
- **Emirates** plans 73 services a week to the UK from October and will introduce daily frequencies to Düsseldorf, Frankfurt, Hamburg & Munich, including some A380s.
- **Qantas** plans to require all frontline staff to be fully vaccinated by mid November and all staff by the end of March; launches reward campaign for Frequent Flyers to encourage vaccination; expects total COVID revenue loss to exceed €12.3 billion by the end of 2021; plans to bring back five A380s into service from mid 2022 for UK and US routes; records net loss for year to end June of €1.07 billion.
- **Singapore Airlines** to operate quarantine-free flights to Germany under the Vaccinated Travel Lane scheme.
- **South African Airways** plans to resume passenger operations from 23 September.
- **Southwest** Airlines launches a hiring referral bonus scheme for staff as part of its efforts to hire 4,500.
- **Zambia Airways** launching commercial operations in September.

States (Daily Departure/Arrival flights)

Top 10

Rank evolution over 2 weeks	Top 10 States on Wed 01-09-2021				
	State	Flights (Dep/Arr)	Δ over 2 weeks	% over 2 weeks	% vs 2019
↗	Germany	4028	↗ +224	+6%	↘ -39%
↘	Spain	3797	↘ -58	-2%	↘ -29%
→	France	3553	↗ +203	+6%	↘ -29%
→	United Kingdom	3477	↗ +363	+12%	↘ -48%
→	Italy	3034	↗ +26	+1%	↘ -29%
→	Turkey	2874	↘ -49	-2%	↘ -18%
→	Greece	1832	↘ -168	-8%	↘ -7%
→	Netherlands	1304	↘ -11	-1%	↘ -30%
→	Norway	1253	↗ +83	+7%	↘ -27%
↗	Poland	935	↗ +30	+3%	↘ -32%

Within the top 10, **highest increase** over two weeks for:

- **United Kingdom** (+363 flights; +12%) mainly driven by BA, light aircraft operators, Loganair, Ryanair and Jet2.com. Mainly flows with Germany, Spain, France, US and Switzerland.
- **Germany** (+224 flights; +6%) mainly due to Eurowings, Lufthansa, German Wings and Condor. Domestic flows and flows with Italy, France and UK.
- **France** (+203 flights; +6%) mainly due to light aircraft operators and Air France. Domestic flows and flows with UK and Germany.

Decrease for **Greece** (-168 flights; -8%) mainly due to Volotea, Olympic and Ryanair. Flows with Italy, Greece and France

Increase in the **ranking** for **Germany**.

States (Daily Departure/Arrival flights)

Top 10 over the last rolling week

Top 10 States

on Week 26 Aug - 01 Sep 2021 (avg daily dep/arr)

1. Spain
4,104 flights
↓25%
vs same week in 2019
↓0% over 2 weeks

2. Germany
3,997 flights
↓36%
vs same week in 2019
↑2% over 2 weeks

3. France
3,808 flights
↓23%
vs same week in 2019
↑7% over 2 weeks

4. United Kingdom
3,494 flights
↓48%
vs same week in 2019
↑10% over 2 weeks

5. Italy
3,264 flights
↓25%
vs same week in 2019
↑2% over 2 weeks

6. Turkey
3,011 flights
↓16%
vs same week in 2019
↓1% over 2 weeks

7. Greece
2,042 flights
↓3%
vs same week in 2019
↓4% over 2 weeks

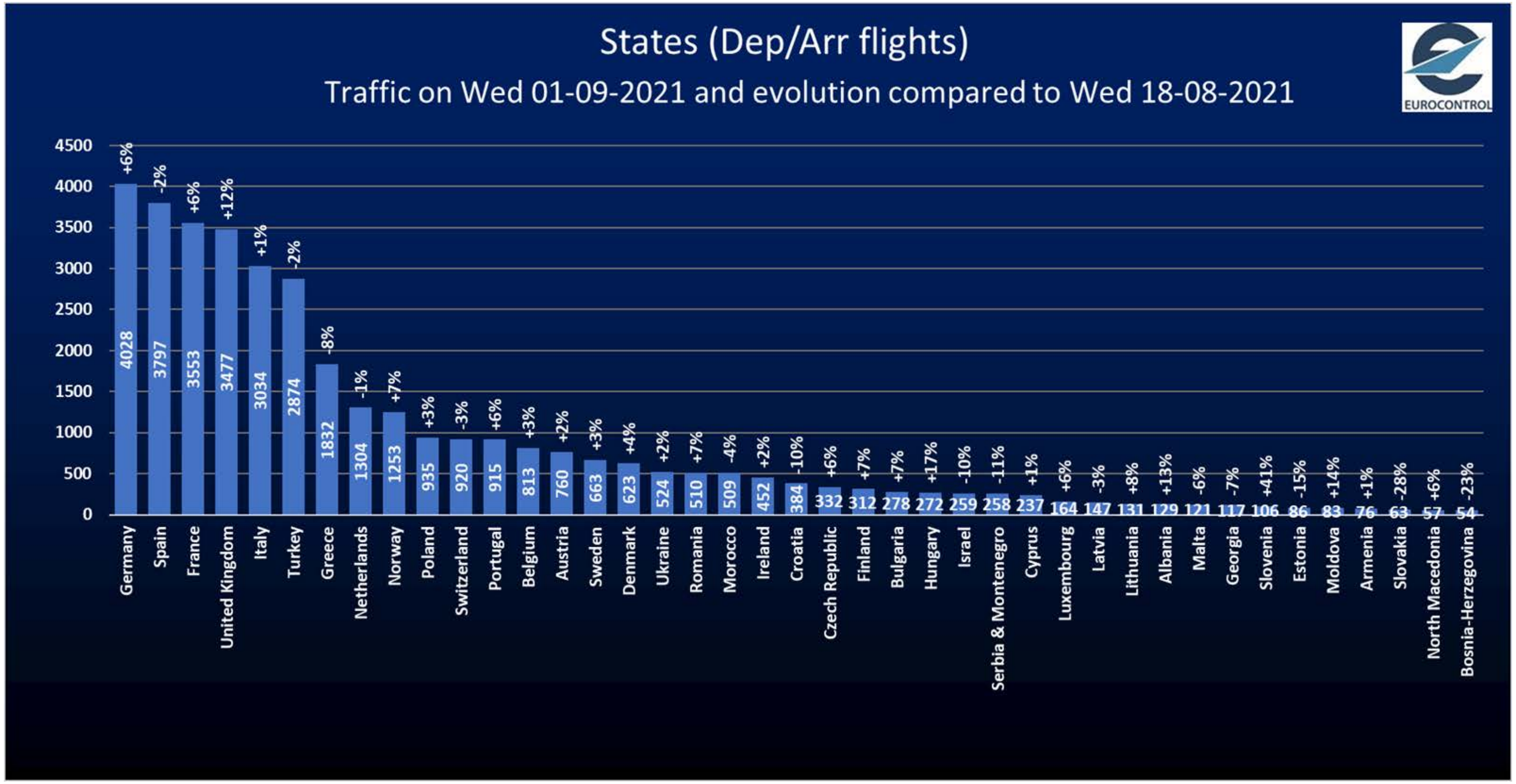
8. Netherlands
1,350 flights
↓26%
vs same week in 2019
↑2% over 2 weeks

9. Norway
1,101 flights
↓30%
vs same week in 2019
↑9% over 2 weeks

10. Switzerland
1,019 flights
↓28%
vs same week in 2019
↑3% over 2 weeks

States (Daily Departure/Arrival flights)

Latest traffic situation



- Highest increases for **UK** (+12% over 2 weeks), **Germany** (+6%) and **France** (+6%).
- Decrease for **Greece** (-8%).
- Traffic levels ranging from -63% (Slovakia) to +40% (Albania), compared to 2019.

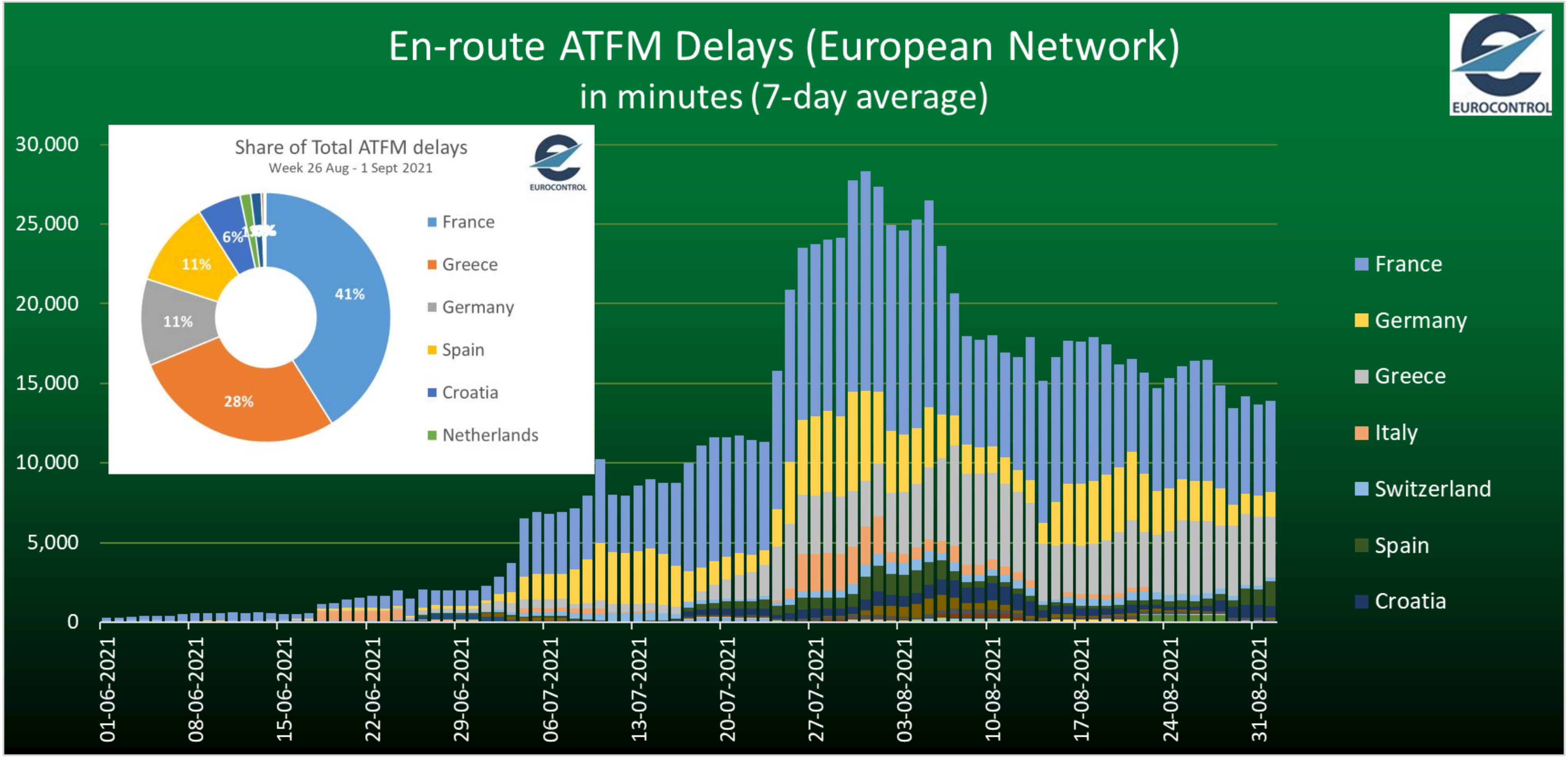
Associations, Authorities, Industry and States

- **IATA Travel Pass** now recognises EU and UK digital COVID certificates; IATA urges states to use the EU CDD as a global standard.
- **African Airlines Association (AFRAA)** reports August passenger traffic was at 46.8% of August 2019, while capacity was at 54.6%.
- **The European Commission** removes the US, Israel, Kosovo, Lebanon, Montenegro and North Macedonia from the list of states allowed for non-essential travel.

- **Boeing** carries out first test flight of 737MAX in China for recertification.
- **Embraer** reported in Q2 2021: revenue of USD 388.5M for its commercial aviation segment, up 257.7% compared to 2019; orders for 48 commercial aircraft; delivery of 14 aircraft.
- **German Finance Agency** reported to be planning to complete the sale of its stake in Lufthansa by 2023.
- **TUI Group** reports average booking price up 9% compared to 2019 with 60% of capacity.

- **ENAC** planning to penalise easyJet, Wizz Air and Volotea over seating policies, having already found Ryanair to be in violation of its rules barring airlines from charging to allocate guardians or carers close to minors or people with disabilities.
- **France's DGAC** reports that July passenger numbers were down 50% on 2019 (domestic within Metropolitan France -21%, international -57%).
- **India** DGCA approves the resumption of 737 MAX commercial operations.
- **NATS** brings forward its net zero carbon emissions targets from 2050 to 2035.

En-route ATFM delays

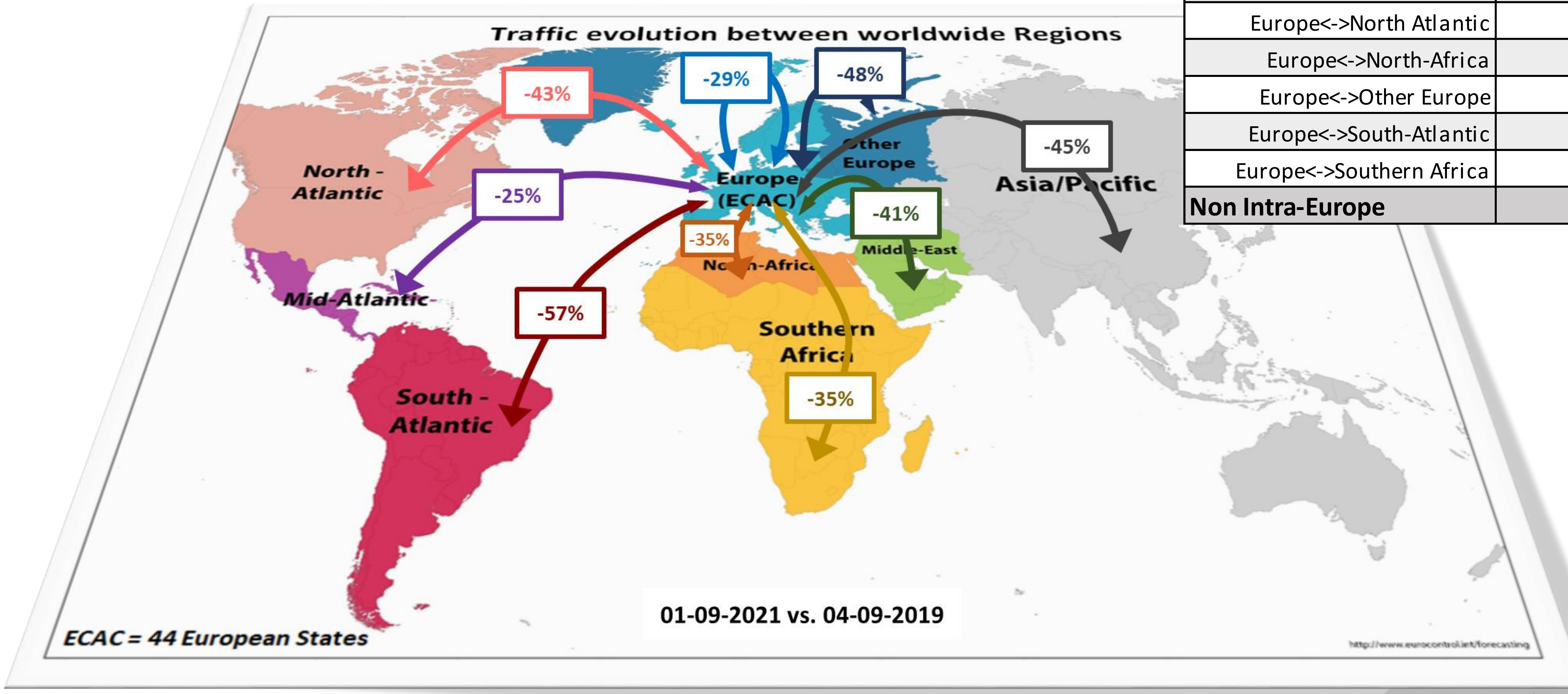


- En-route ATFM delays have started to rise since end June.
- Major contributors over the last 7 days: **France** (41% of all en-route ATFM delays), **Greece** (28%), **Germany** (11%), **Spain** (11%) and **Croatia** (6%).

Traffic flows (Daily Departure/Arrival flights)

- The main traffic flow is the intra-Europe flow with 19,946 flights on Wednesday 1 September, which is increasing (+3%) over 2 weeks.
- Intra-Europe flights are at -29% compared to 2019 while intercontinental flows are at -42%.

REGION	18-08-2021	01-09-2021	%	vs. 2019
Intra-Europe	**19 445**	**19 946**	***+3%***	***-29%***
Europe<->Asia/Pacific	447	446	*-0%*	*-45%*
Europe<->Mid-Atlantic	129	119	*-8%*	*-25%*
Europe<->Middle-East	961	934	*-3%*	*-41%*
Europe<->North Atlantic	683	769	*+13%*	*-43%*
Europe<->North-Africa	749	767	*+2%*	*-35%*
Europe<->Other Europe	655	653	*-0%*	*-48%*
Europe<->South-Atlantic	94	84	*-11%*	*-57%*
Europe<->Southern Africa	212	206	*-3%*	*-35%*
Non Intra-Europe	**3 930**	**3 978**	***+1%***	***-42%***



Country pairs (Daily Departure/Arrival flights)

Top 10

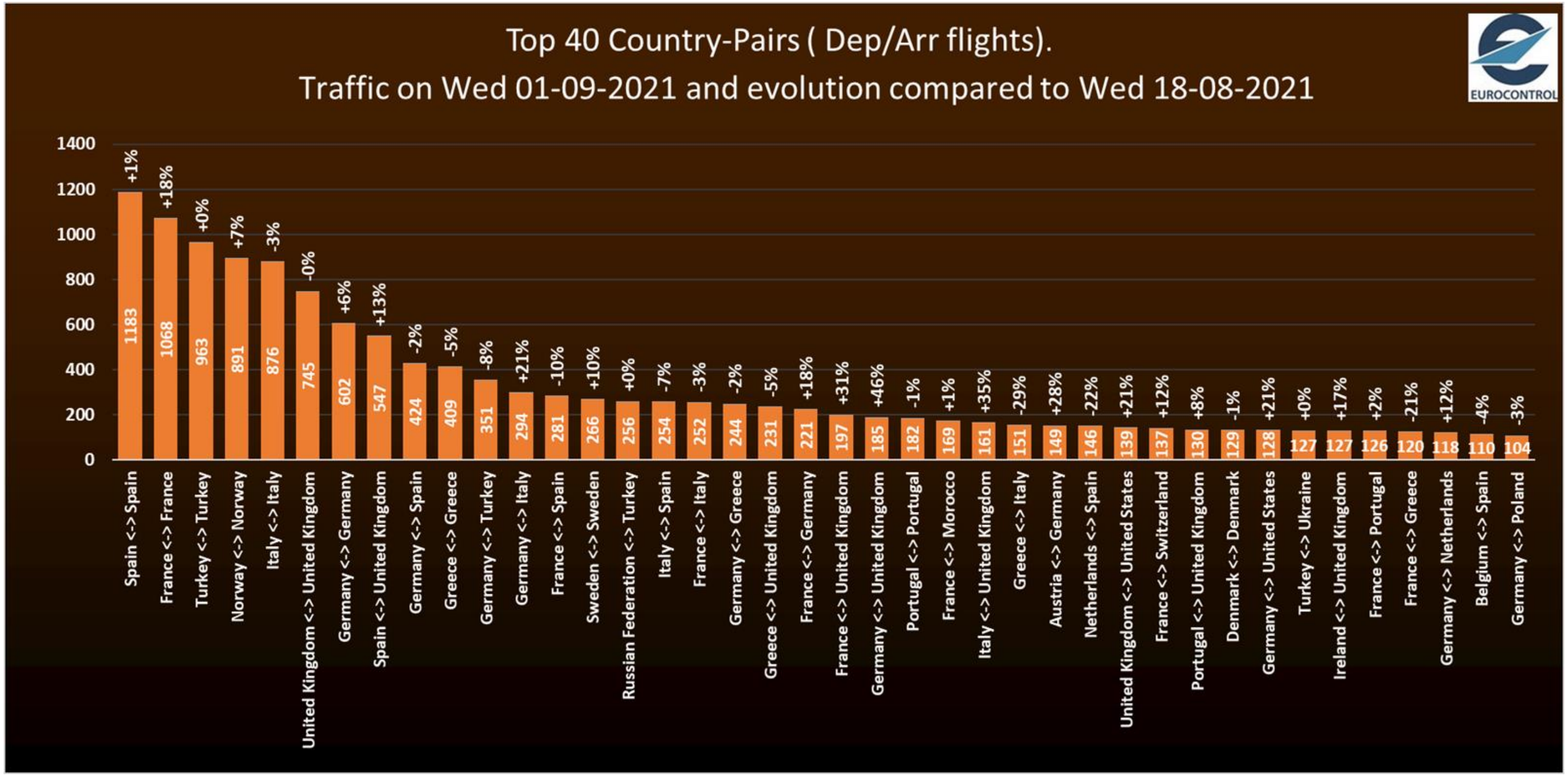
Top 10 Country-Pair on Wed 01-09-2021

Rank evolution over 2 weeks	Country-Pair	Dep/Arr Flights	Δ over 2 week	% over 2 week	% vs 2019
→	Spain <-> Spain	1183	↗ +11	+1%	↘ -13%
↗	France <-> France	1068	↗ +164	+18%	↘ -19%
↘	Turkey <-> Turkey	963	→ +0	+0%	↘ -3%
↗	Norway <-> Norway	891	↗ +55	+7%	↘ -11%
↘	Italy <-> Italy	876	↘ -25	-3%	↘ -2%
→	United Kingdom <-> United Kingdo	745	↘ -3	-0%	↘ -34%
→	Germany <-> Germany	602	↗ +36	+6%	↘ -46%
→	Spain <-> United Kingdom	547	↗ +61	+13%	↘ -41%
→	Germany <-> Spain	424	↘ -8	-2%	↘ -33%
→	Greece <-> Greece	409	↘ -21	-5%	↘ -5%

- 8 of the top 10 flows are domestic.
- **Highest increases** for:
  - **France-France** (+164 flights; +18%) owing to light aircraft operators and Air France.
  - **Spain-UK** (+61 flights; +13%) owing to light aircraft operators, Jet2.com and easyJet.
  - **Norway-Norway** (+55 flights; +7%) owing to Wideroe, Norwegian Air Shuttle and SAS.
- **Highest decrease** for **Greece-Greece** (-21 flights; -5%) mainly due to Olympic.
- Domestic flows in Italy, Turkey and Greece are very close to pre-COVID levels (2019).

Country pairs (Daily Departure/Arrival flights)

Latest traffic situation

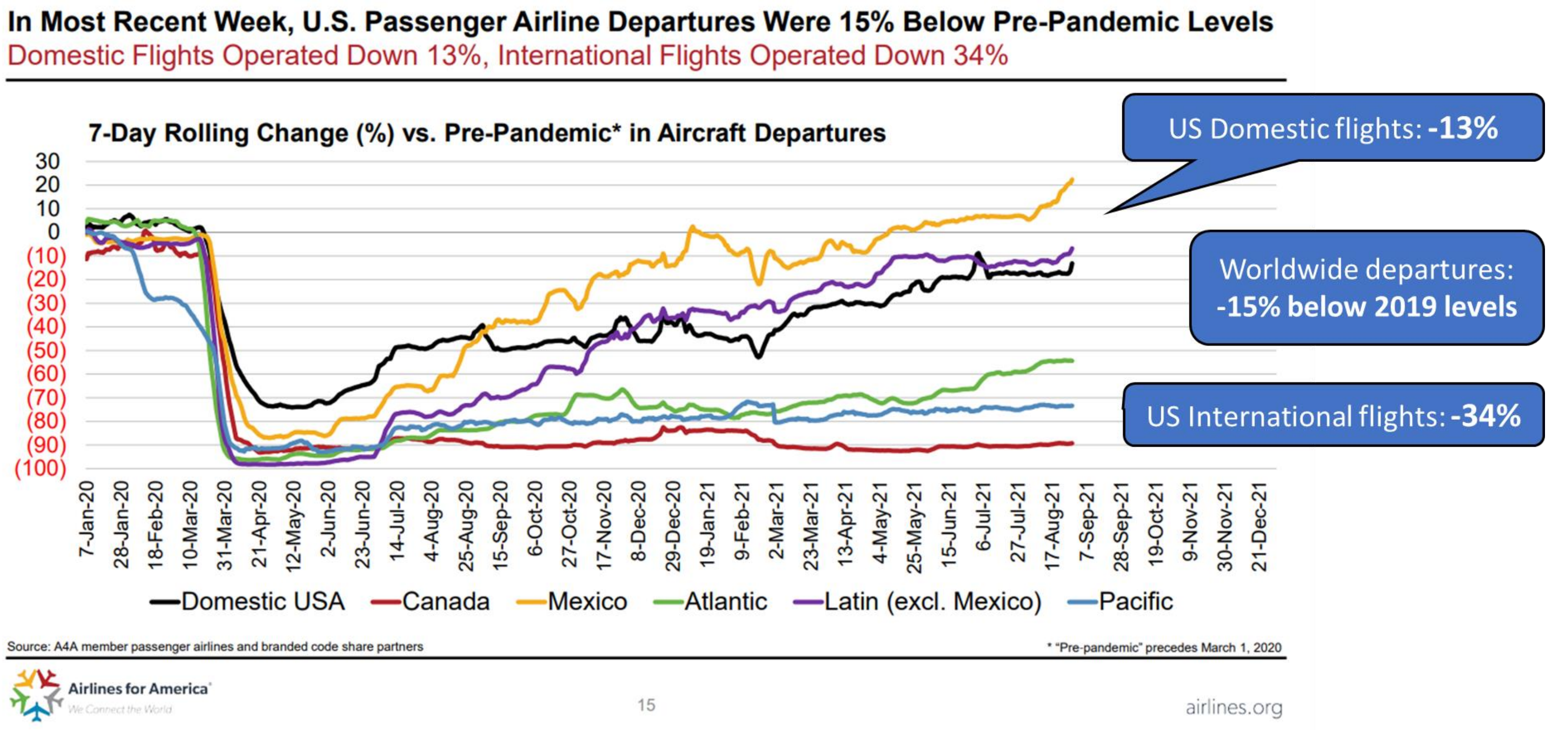


- Flows recording the biggest increases over two weeks:
  - **France-France** (+18%) owing to light aircraft operators and Air France.
  - **Spain-UK** (+13%) thanks to light aircraft operators, Jet2.com and easyJet.
  - **Germany-UK** (+17%) mainly due to Lufthansa, BA and Eurowings.
  - **Germany-Italy** (+21%) mainly due to Eurowings and Air Dolomiti.
- Flows recording the biggest decrease over two weeks:
  - **Greece-Italy** (-29%) mainly due to Volotea and Aegean Airlines.

Outside Europe

USA

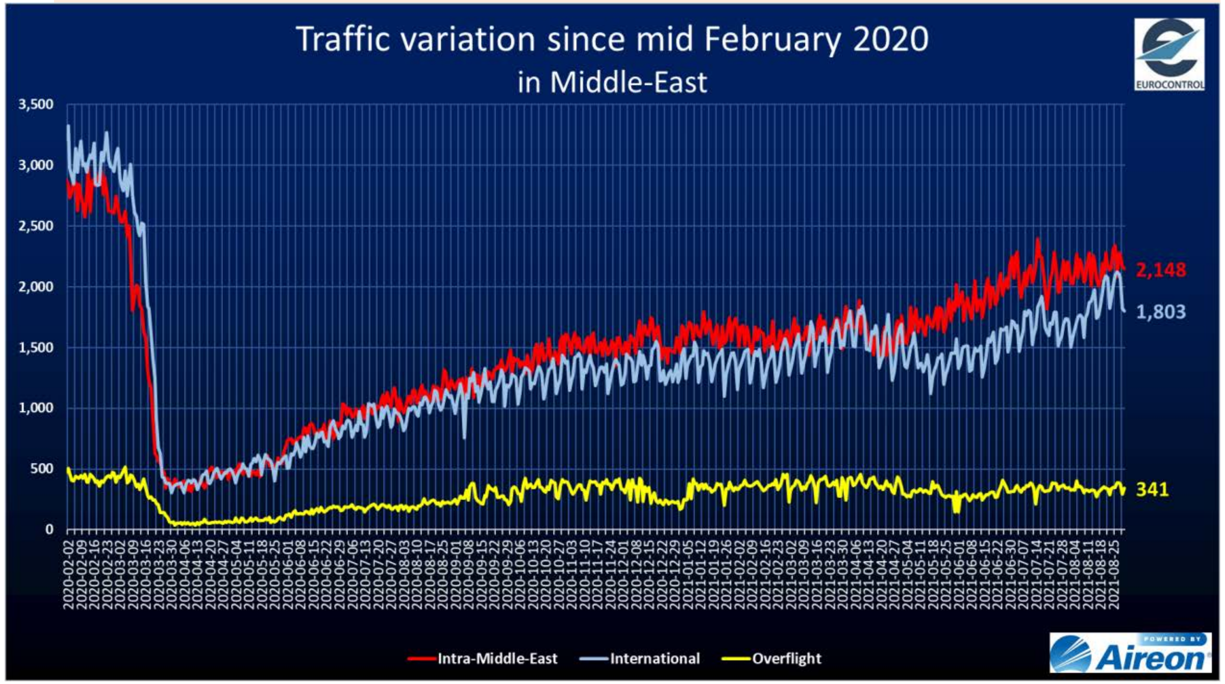
- The timing of a return to 2019 passenger volumes depends in large part on business travel. The U.S. Travel Association projects U.S. business travel to return to 2019 levels in 2024.
- On 31 August, US passenger airline departures were 15% below 2019 levels with domestic down 13% and international down 34%.
- The domestic US load factor is 75% (end August). Since mid-August, it has fallen below pre-pandemic levels.
- In most recent week, average airfares on tickets sold were 29% below pre-pandemic levels owing mainly to dearth of business and long-haul international travel.



Outside Europe

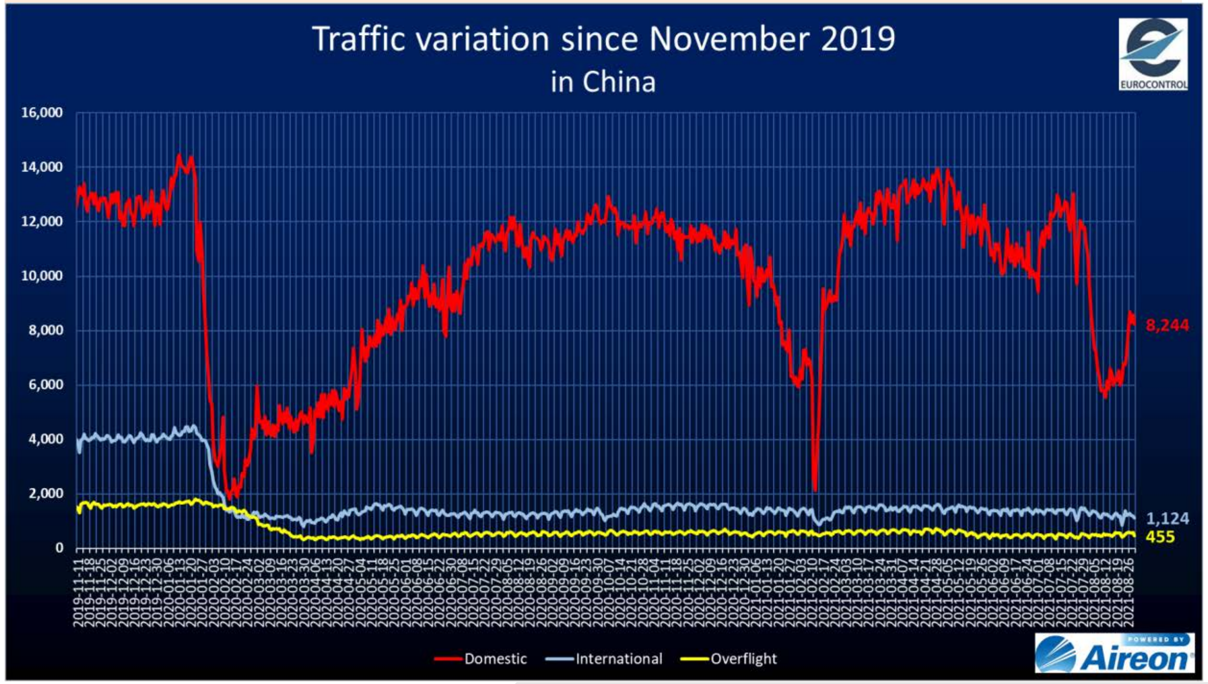
Middle East

- On 31 August Intra-Middle-East traffic recorded 2,148 flights (-23% compared to Feb 2020).
- International traffic from and to Middle-East recorded 1,803 flights (-41% compared to Feb 2020).
- Overflights recorded 341 flights (-20% compared to Feb 2020).



China

- After spread of Delta variant across China early August, tightened travel restrictions resulted in domestic flights down to -50% (vs Jan. 2020). On 30 August, situation has slightly improved with flights being at -31% (8,244 flights).
- International flights also impacted by the outbreak, recorded 1,124 flights (-72%) compared to 1 Jan 2020. Overflights remain suppressed with 455 flights (-71%).



Airports (Daily Departure/Arrival flights)

Top 10 and latest news

Rank evolution over 2 weeks	Top 10 Airports on Wed 01-09-2021				
	Airport	Dep/Arr Flights	∆ over 2 weeks	% over 2 weeks	% vs 2019
→	Amsterdam	1023	↗ +4	+0%	↘ -32%
→	IGA Istanbul Airport	976	↘ -19	-2%	↘ -24%
→	Paris/Charles-De-Gaulle	899	↘ -27	-3%	↘ -43%
→	Frankfurt	882	↗ +51	+6%	↘ -44%
↗	Madrid/Barajas	788	↗ +51	+7%	↘ -39%
↘	Antalya	740	↘ -6	-1%	↘ -20%
↗	Barcelona	736	↗ +69	+10%	↘ -33%
↗	London/Heathrow	677	↗ +109	+19%	↘ -51%
↘	Athens	642	↘ -45	-7%	↘ -16%
↘	Palma De Mallorca	620	↘ -58	-9%	↘ -25%

Highest increases in flights for:

- **Heathrow**(+109 flights; +19%) due to BA and flows to Germany, US and Italy.
- **Barcelona** (+69 flights; +10%) due to Vueling and domestic flows.
- **Madrid** (+51 flights; +7%) due to domestic flows.
- **Frankfurt** (+51 flights; +6%) due to Lufthansa and flows to UK, Italy and Germany.

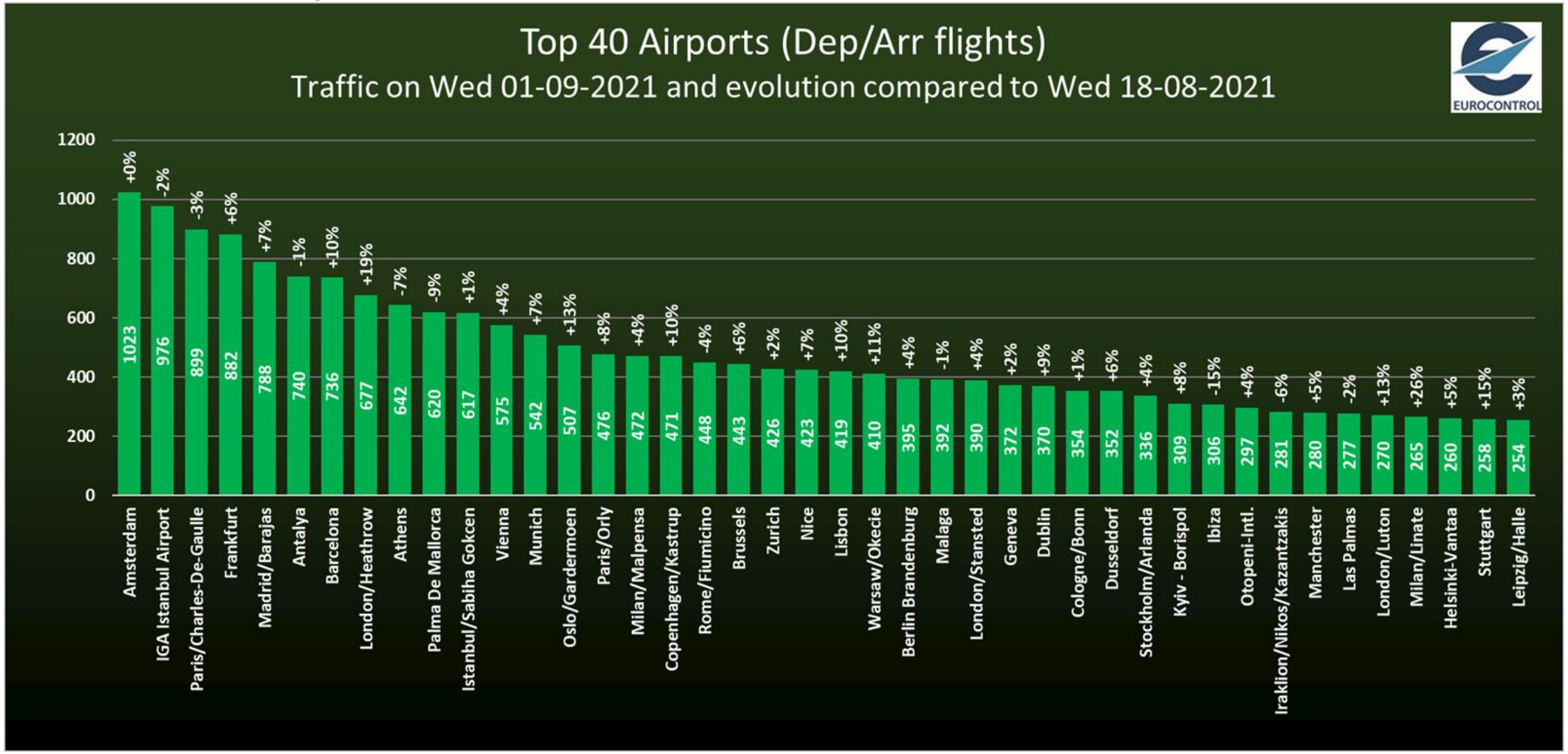
Decrease for:

- **Palma de Mallorca** (-58 flights; -9%) due Ryanair and flows with Italy, Netherlands and Germany.
- **Athens** (-45 flights; -7%) mainly due to Aegean Airlines and flows with Greece, France and Italy.

Decrease in the ranking for Antalya, Athens and Palma.

Airports (Daily Departure/Arrival flights)

Latest operations



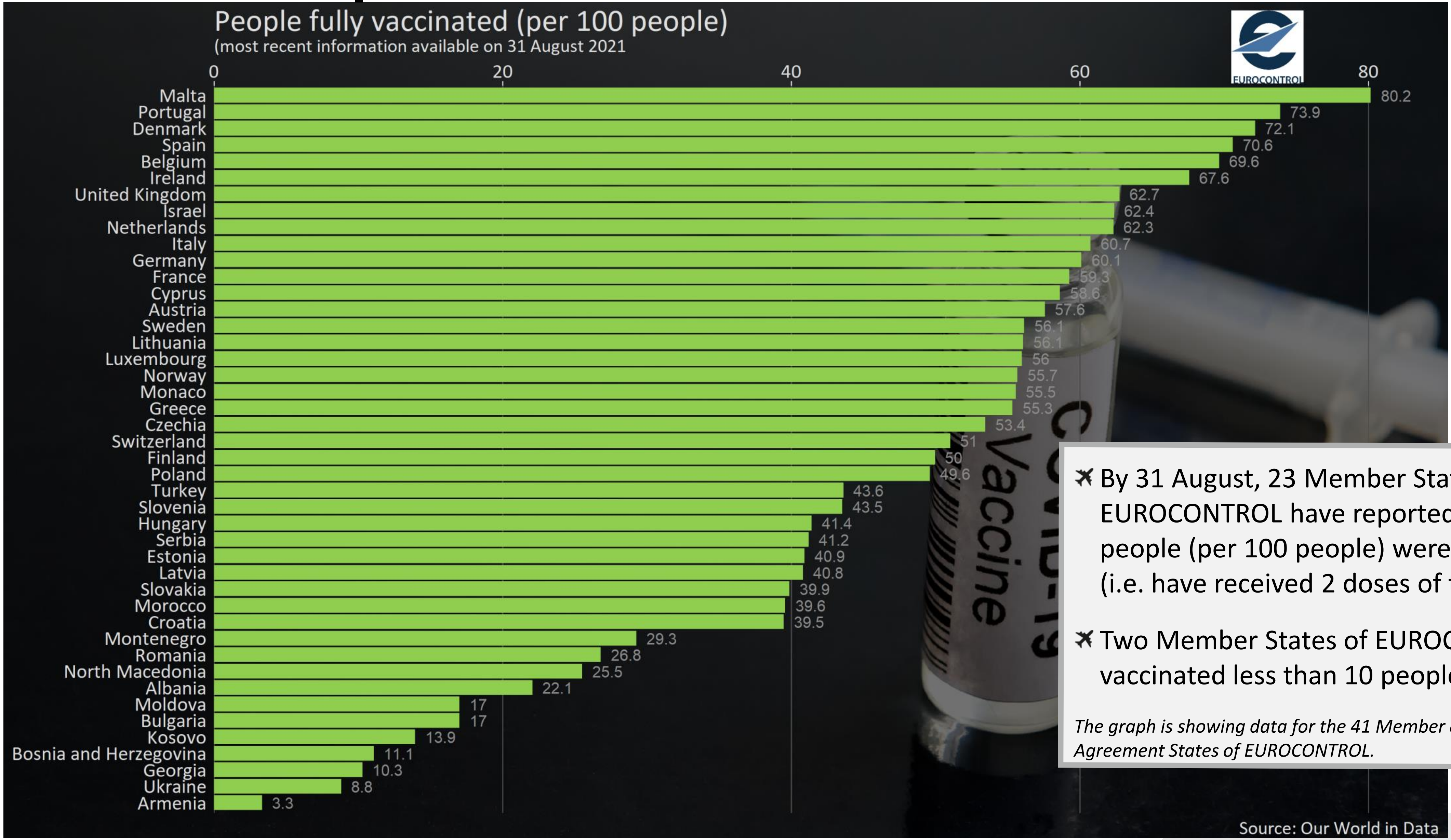
- Largest increase in flights over 2 weeks for **Heathrow** (+19%), **Barcelona** (+10%), **Oslo** (+13%), **Milan/Linate** (+26%) and **Madrid/Barajas** (+7%).
- Traffic levels ranging from -74% (Gatwick) to -2% (Nice) compared to 2019.

Airports

Latest news

- **ACI Europe** reported H1 2021 passengers down 76.9% compared to 2019.
- **Copenhagen airports** report revenue down 52% in H1 2021.
- **Copenhagen Kastrup** reports capital investments of €36 million in H1 2021.
- **London Gatwick** reports loss of £244.6 million in H1 2021; plans public consultation on routine use of northern runway.
- **Munich Airport** handled over 70k pax on 21 August, expecting 1.8 million for the month.
- **Singapore Changi Airport** reports July passenger numbers of 204,000, 96.5% down on July 2019.

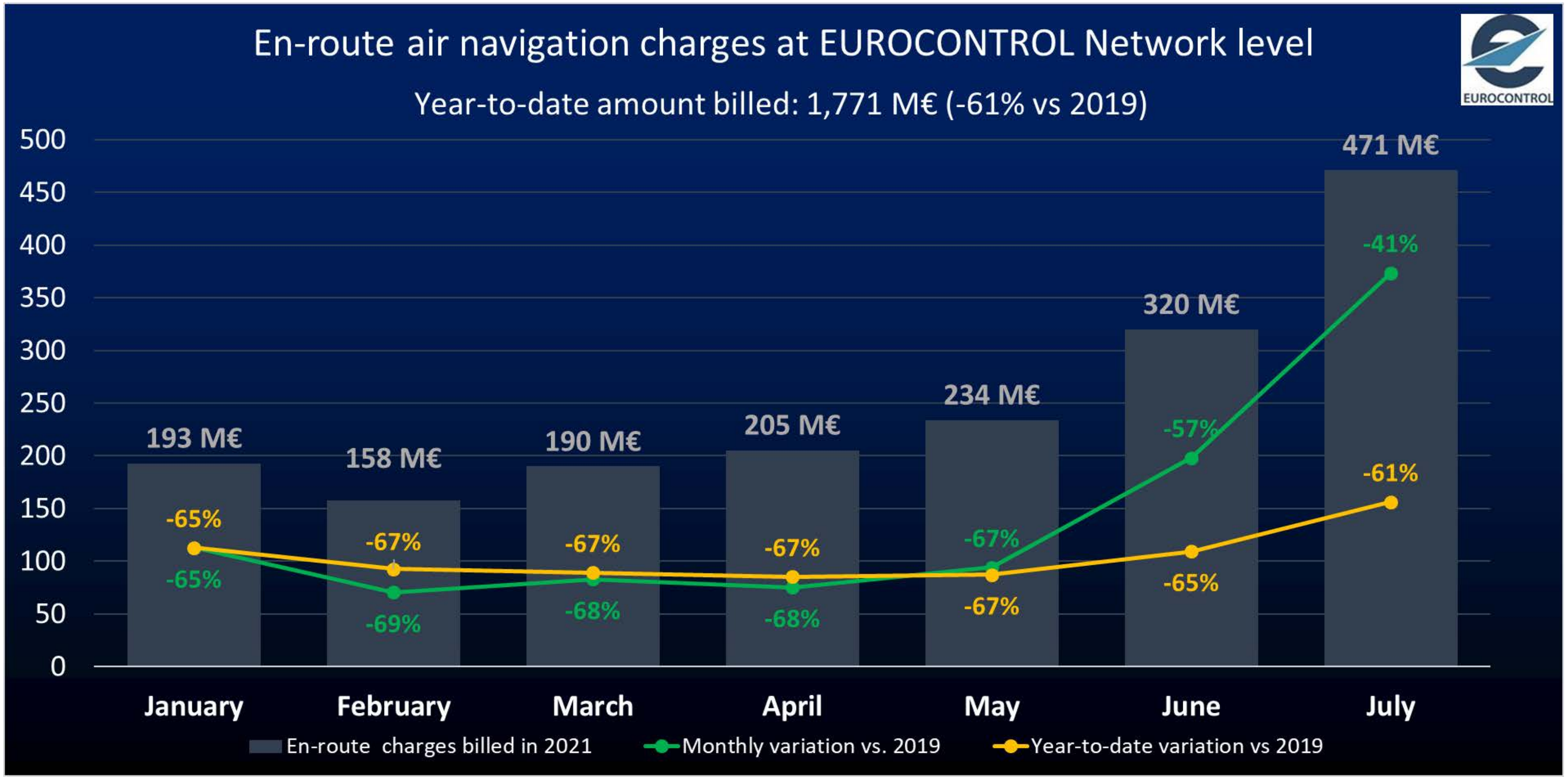
Vaccination updates



- By 31 August, 23 Member States of EUROCONTROL have reported that at least 50 people (per 100 people) were fully vaccinated (i.e. have received 2 doses of the main vaccines).
- Two Member States of EUROCONTROL have fully vaccinated less than 10 people (per 100 people).

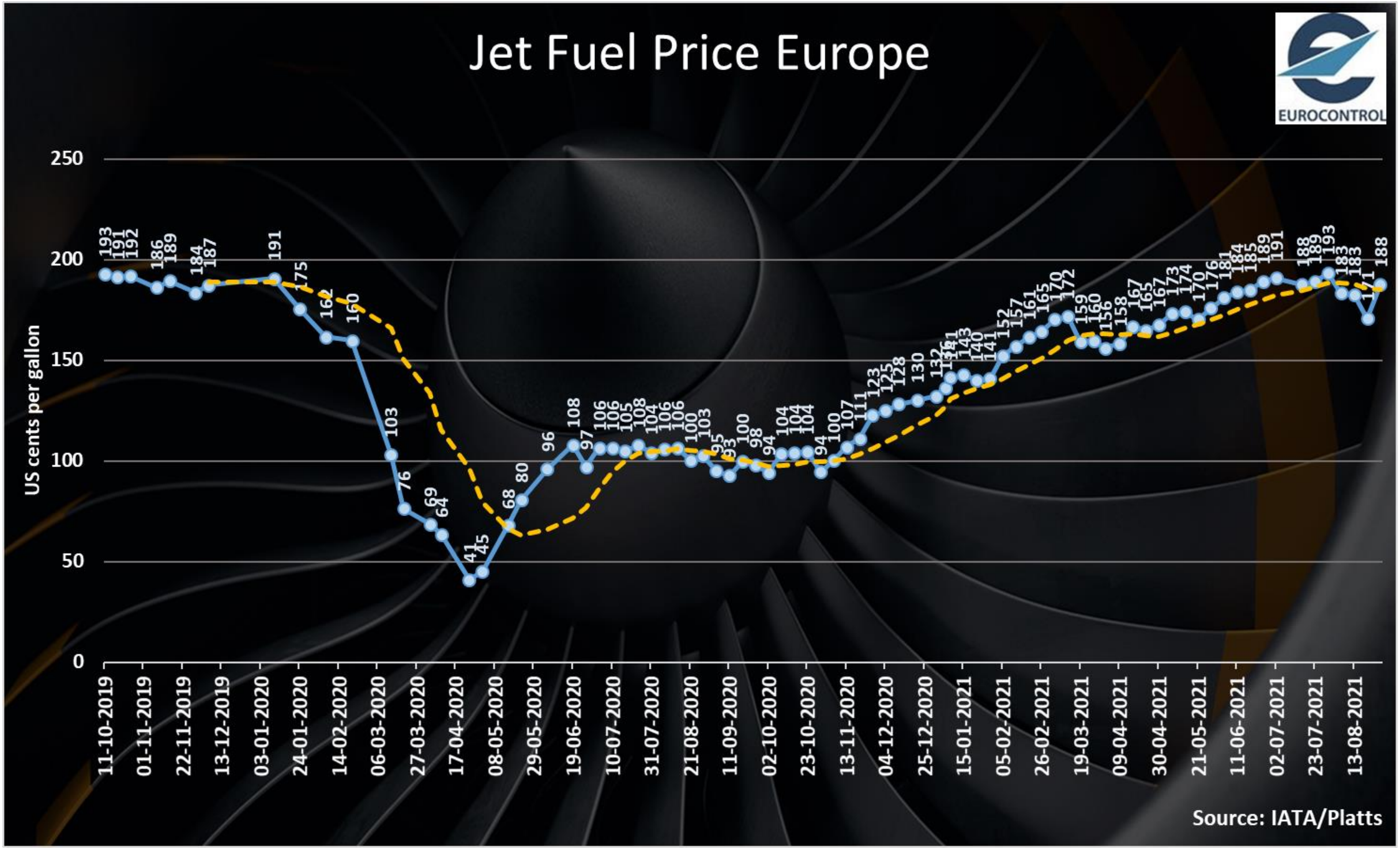
The graph is showing data for the 41 Member and 2 Comprehensive Agreement States of EUROCONTROL.

En-Route Air Navigation charges



- **EUROCONTROL** has billed **471M€** of en-route charges for July flights.
- This is **-41%** below the amount billed for the July 2019 flights.
- On a year-to-date basis, EUROCONTOL billed **1,771M€** which is **-61% vs 2019**

Economics



- **Jet fuel prices** have started to rise since last Autumn, from around 100 cts/gal in October 2020 to **188 cts/gal on 27 August 2021**.
- Since May, jet fuel prices have been gradually rising, adding pressure on airlines' costs.

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

www.eurocontrol.int