30 September 2021

COVID 19 IMPACT ON EUROPEAN AVIATION

EUROCONTROL
Comprehensive Assessment

Headlines

- **23,208** flights (69% of 2019 levels) on Wed 29 September 2021, a slight decrease over 2 weeks (-0.4%).
- Flight volumes are decreasing owing to the end of the Summer (70% of 2019 levels for 1-29 Sept)
- Ryanair is the busiest operator (-12% Vs 2019 with 2,200 flights), followed by Turkish Airlines (-17% Vs 2019 with 1,149 flights) and Lufthansa (-51% Vs 2019 with 785).
- easyJet, Vueling, Turkish Airlines and Pegasus reduced their capacities compared to two weeks ago.
- Domestic traffic vs 2019: Europe (-29%), USA (-16%), China (-8%), Middle-East (-23%).
- Fuel prices have broken the 200 cents/gallon barrier, the highest price since May 2019.
- All-cargo and Business Aviation are above 2019 levels with +7% and +27% respectively. Charter is stable at -7% vs 2019. Traditional is at -41% vs 2019 and -31% for low-cost.

Traffic Situation

Daily flights (including overflights)

Traffic over the last 7 days is

↓29%

Compared to equivalent days in 2019

EUROCONTROL

Top 10 Aircraft Operators

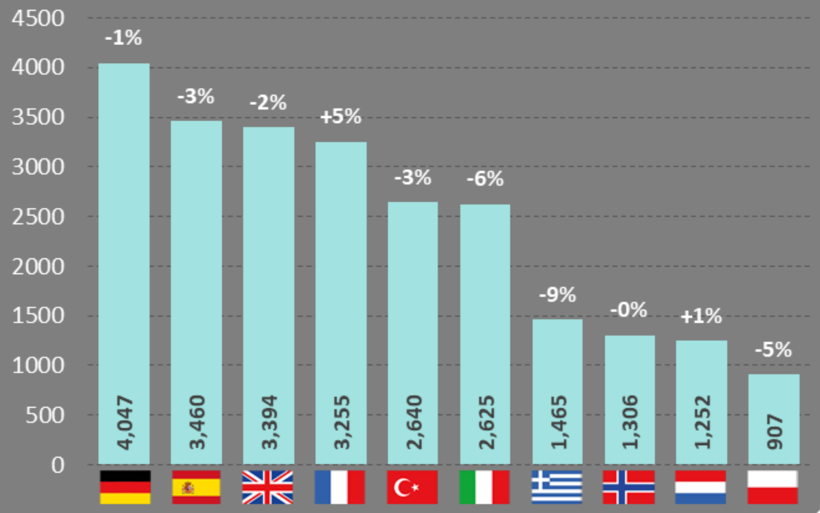
on Wed 29 September 2021 (daily flights)

1. Ryanair — Operated 2200 flights — ↓12% of same day in 2019 — ↓1% over 2 weeks
2. Turkish Airlines — Operated 1149 flights — ↓17% of same day in 2019 — ↓2% over 2 weeks
3. Lufthansa — Operated 785 flights — ↓51% of same day in 2019 — ↓0% over 2 weeks
4. easyJet — Operated 756 flights — ↓57% of same day in 2019 — ↓4% over 2 weeks
5. Air France — Operated 706 flights — ↓44% of same day in 2019 — ↑1% over 2 weeks
6. KLM — Operated 681 flights — ↓28% of same day in 2019 — ↑3% over 2 weeks
7. Wizz Air — Operated 533 flights — ↓17% of same day in 2019 — ↓2% over 2 weeks
8. SAS — Operated 491 flights — ↓49% of same day in 2019 — ↑6% over 2 weeks
9. Pegasus — Operated 448 flights — ↓8% of same day in 2019 — ↓4% over 2 weeks
10. British Airways — Operated 433 flights — ↓55% of same day in 2019 — ↑7% over 2 weeks

Top 10 Busiest States

on Wed 29 September 2021

(Dep/Arr flights and variation over 2 weeks)



Top 10 Busiest Airports

7-day average Dep/Arr flights on 23– 29 Sep. 2021, compared to 2019

Top 10 Airports	Average dep/arr flights per day (week 23-29/9)	Average dep/arr flights per day (week 23-29/9) vs 2019
Amsterdam	1049	-30%
IGA Istanbul Airport	980	-21%
Frankfurt	926	-40%
Paris/Charles-De-Gaulle	839	-43%
Madrid/Barajas	744	-40%
London/Heathrow	740	-43%
Antalya	686	-19%
Barcelona	683	-36%
Munich	644	-48%
Palma De Mallorca	635	-22%

Market Segments

On 29 Sep, compared to 2019

↓31% Low cost

↓41% Traditional

↑27% Business Aviation

↓ 7% Non-Scheduled/ Charter

↑ 7% All Cargo

Traffic Flow

On 29 September, **the intra-European** traffic flow was

18,742 flights

-3% over past **2 weeks**

-29% Compared **to 2019**

Economics

(24 September 2021)

Fuel price

↑**205**

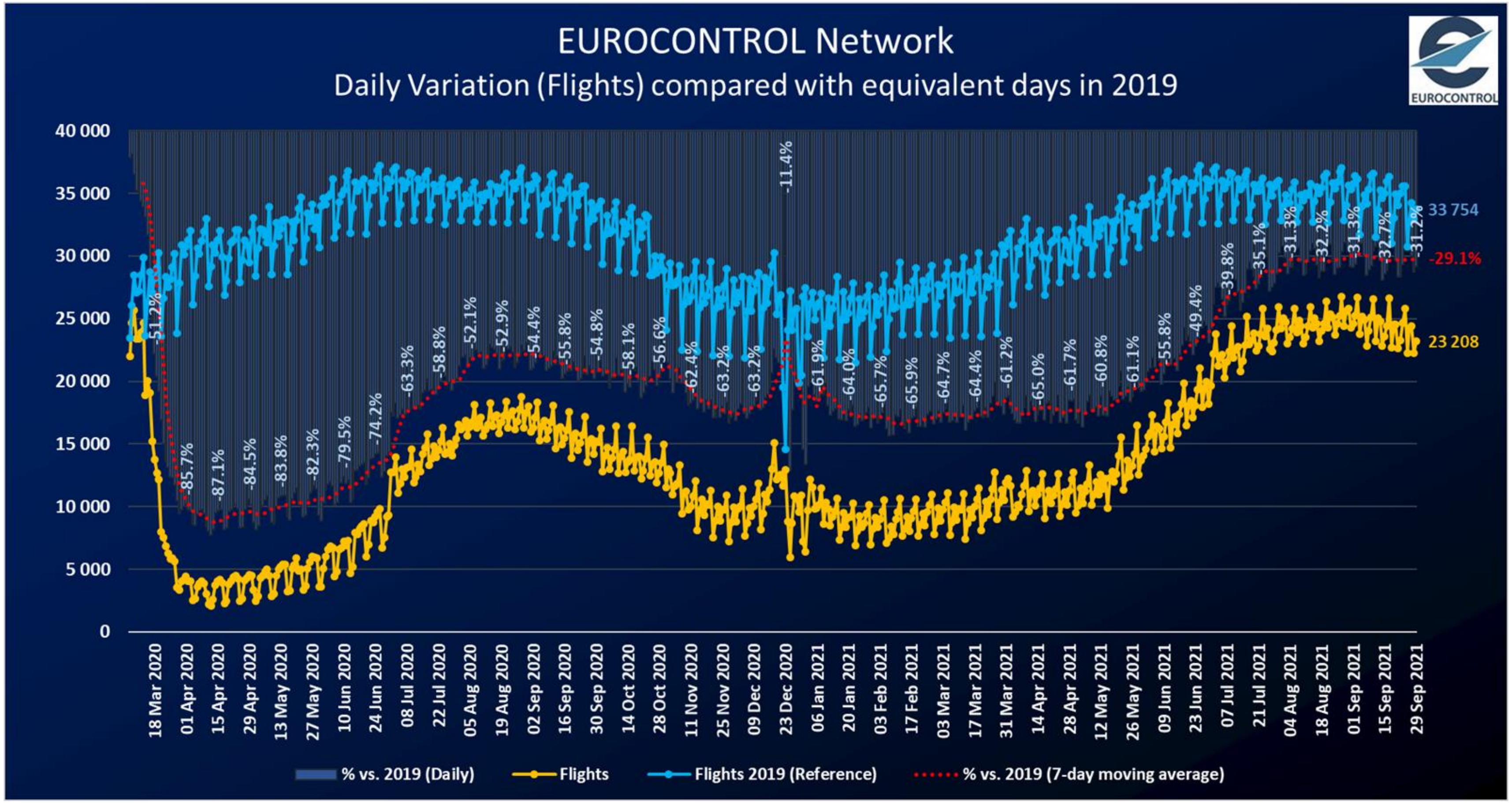
Cents/gallon

compared to **190 cents/gallon on 10 Sept 21**

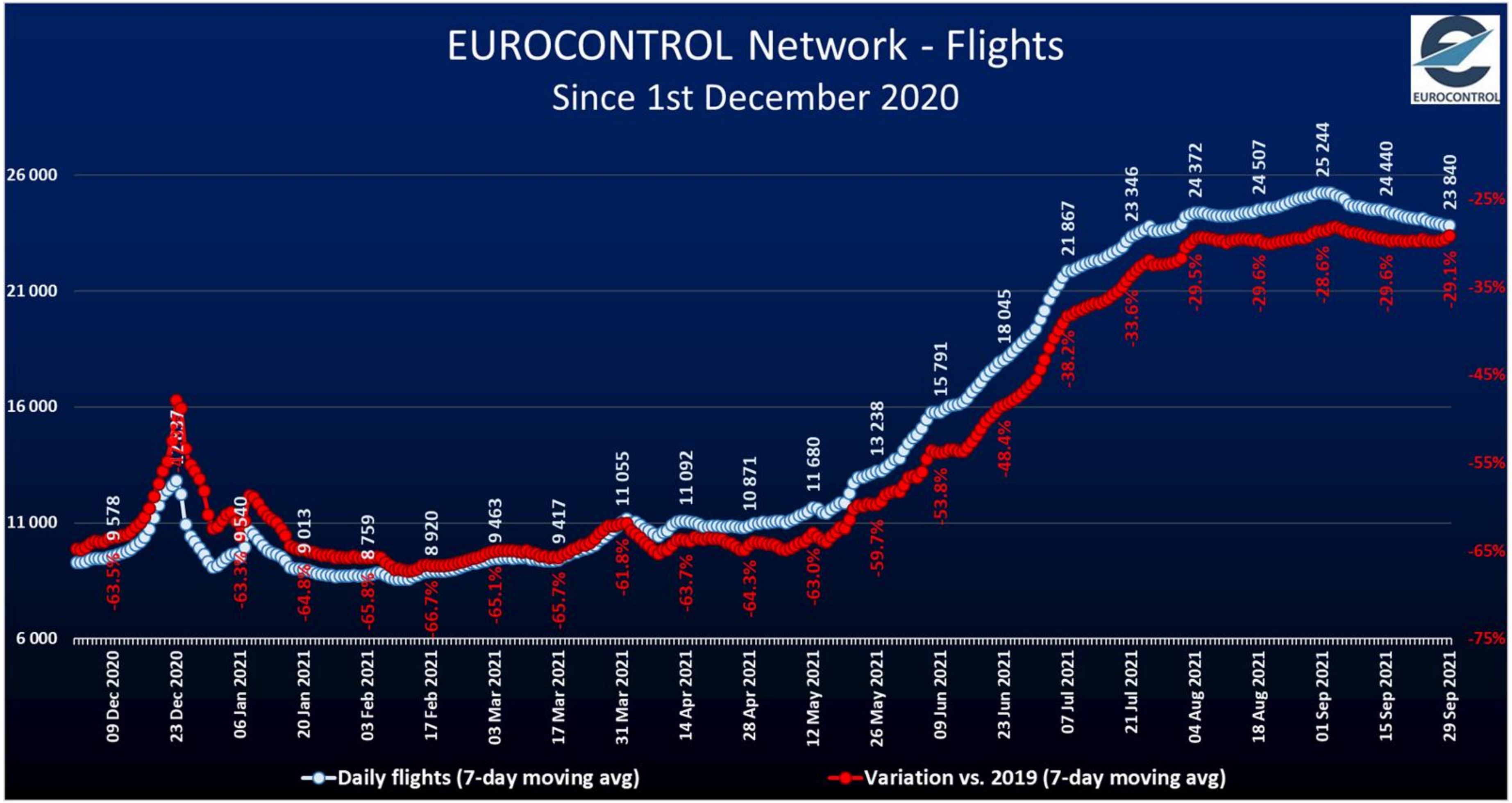
Source: IATA/Platts

Overall traffic situation at network level

- **23,208 flights** on Wednesday 29 September.
- **-1.6%** with **-371 flights** over 2 weeks (from Wednesday 15 September).
- **-0.4%** with **-95 flights** over 1 week (from Wednesday 22 September).
- **69%** of 2019 traffic levels.



Current traffic evolution

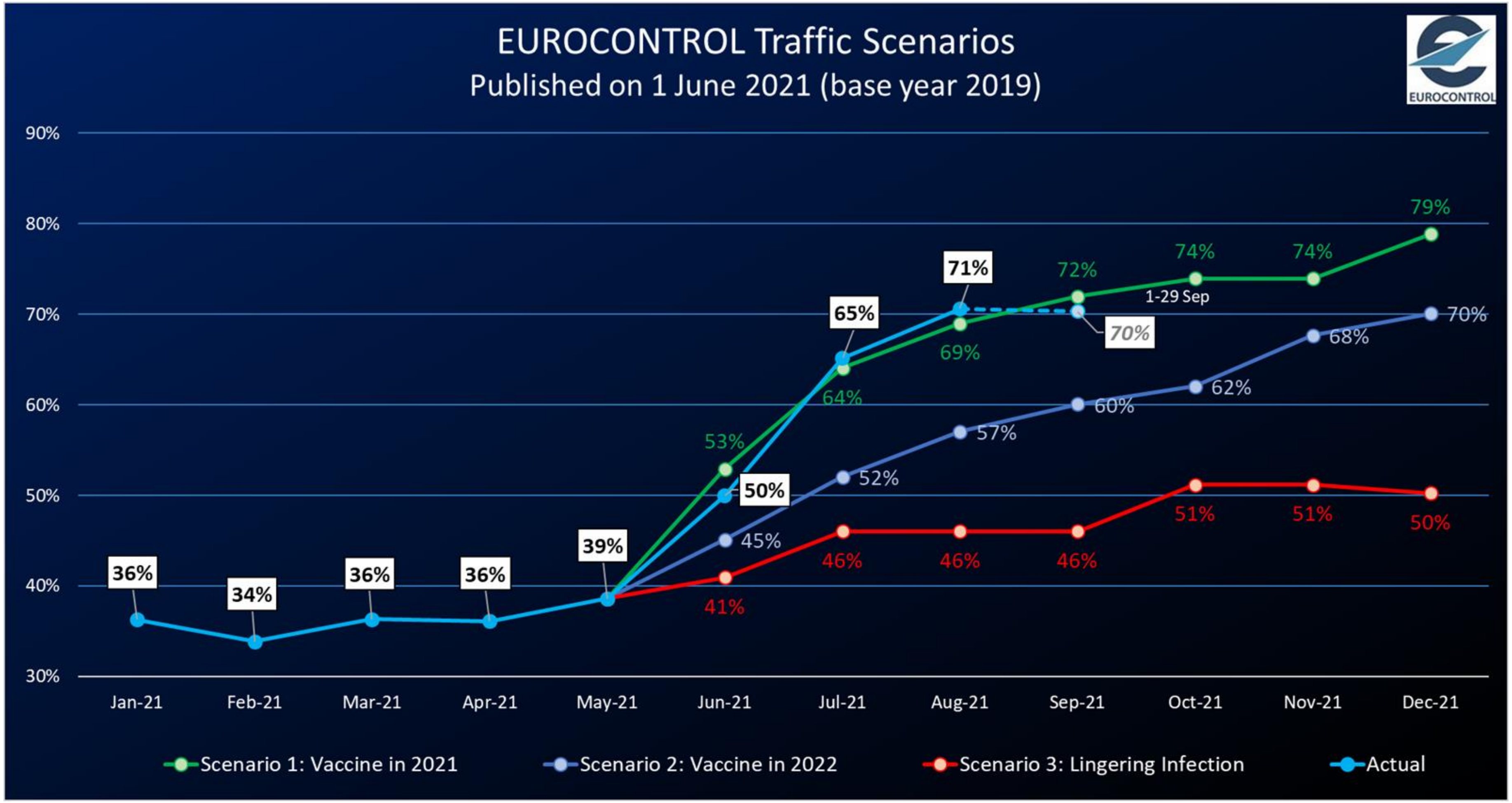


- After a continuous increase from mid-May to end-August, the traffic at network level has decreased slowly since early September.
- It reached its maximum on Friday 27 August 2021 with 26,773 flights (-27.7% vs 2019).
- Early September, at network level, traffic was close to 72% of 2019 levels. September traffic has decreased to just below 71%.

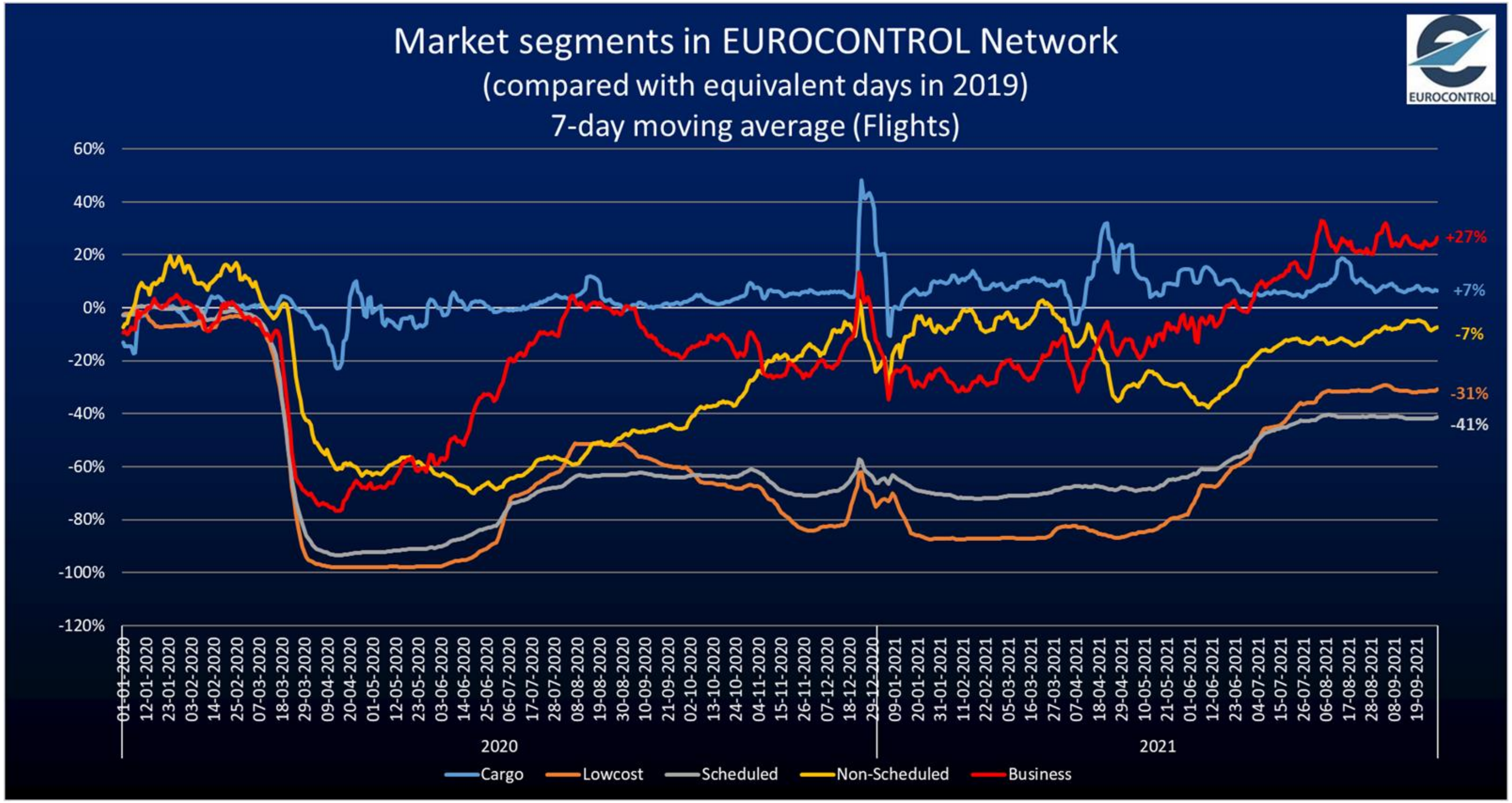
Current situation compared to the latest EUROCONTROL traffic scenarios

- **Traffic** was at **70%** for the first four weeks of September 2021, compared to same period in 2019.

- Since July, the network traffic has been in line with the most optimistic scenario of the latest EUROCONTROL traffic scenarios published on 1 June 2021.



Market Segments



On 29 September 2021, compared to 2019:

- **All-cargo** and **Business Aviation** are the only segments above 2019 levels with **+7%** and **+27%** respectively.
- **Charter** is stable at **-7%** vs 2019.
- **Traditional** and **Low-Cost** have consistently increased since May and have now stabilized at **-41%** vs 2019 for traditional and **-31%** for low-cost.

Aircraft operators (Daily flights)

Top 10

Rank evolution over 2 weeks	Top 10 Aircraft Operators on Wed 29-09-2021				
	Aircraft Operator	Flights	Δ over 2 weeks	% over 2 weeks	% vs 2019
→	Ryanair	2200	↘ -13	-1%	↘ -12%
→	Turkish Airlines	1149	↘ -20	-2%	↘ -17%
→	Lufthansa	785	→ +0	+0%	↘ -51%
→	easyJet	756	↘ -28	-4%	↘ -57%
→	Air France	706	↗ +7	+1%	↘ -44%
→	KLM	681	↗ +18	+3%	↘ -28%
→	Wizz Air	533	↘ -11	-2%	↘ -17%
↗	SAS	491	↗ +26	+6%	↘ -49%
→	Pegasus	448	↘ -19	-4%	↘ -8%
↗	British Airways	433	↗ +28	+7%	↘ -55%

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

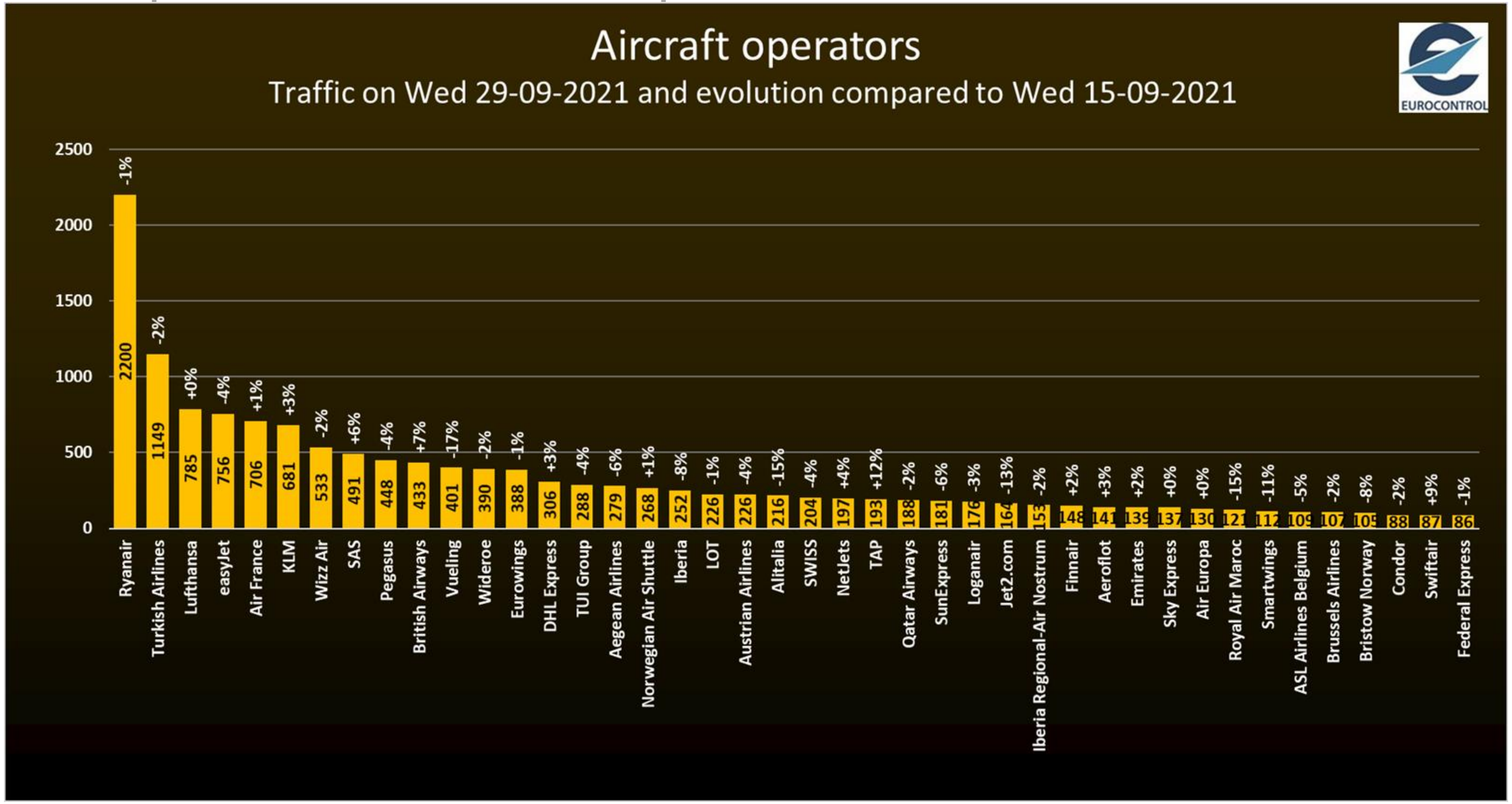
- **easyJet** (-28 flights; -4%) mainly due to decreases on domestic flows (Italy, France) and flows to Spain.
- **Turkish Airlines** (-20 flights; -2%) and **Pegasus** (-19 flights; -4%), mainly due to reduced domestic flows.

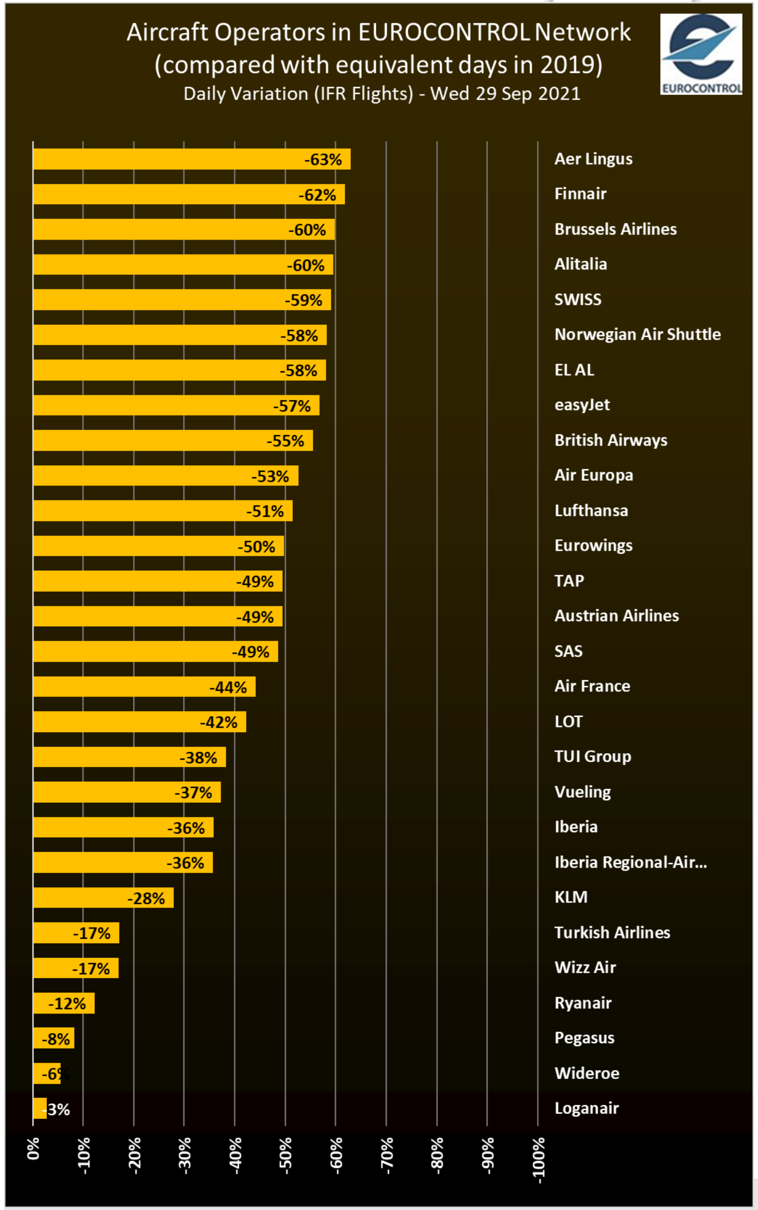
Highest increases for:

- **British Airways** (+28 flights; +7%) mainly due to increase on flows to Spain, Netherlands and domestic flows.
- **SAS** (+28 flights; +6%) mainly due to increases on flows Norway-Denmark and Norway-Sweden.

Aircraft operators (Daily flights)

Top 40 – Latest operations





- Highest increases for **TAP Portugal** (+12%), **British Airways** (+7%), **SAS** (+6%). Highest decreases for **Vueling** (-17%), **Royal Air Maroc** (-15%) and **Alitalia** (-15%).
- Ryanair 1st, Turkish 2nd, easyJet 3rd, Lufthansa 4th, Air France 5th, British Airways 10th.
- Traffic levels ranging from -63% (Aer Lingus) to -3% (Loganair) vs 2019.

Aircraft operators
Latest news

European airlines

- **airBaltic** now operating nearly 90 routes to more than 30 countries, more routes than in 2019.
- **Alitalia** – base price for carrier's branding set at €290 million.
- **Austrian Airlines** plans to resume 16 weekly frequencies to the US in November, following the US relaxation of travel restrictions.
- **British Airways** suspends plans for Gatwick short haul subsidiary following failure to reach an agreement with BALPA.
- **Eurowings** to add new base at Stockholm Arlanda, with 5 aircraft and 20 routes.
- **Finnair** increasing frequencies of 7 European operations this winter.
- **Virgin Atlantic** reports strong demand for UK-Caribbean flights.
- **Eurowings** reported to be planning an operational fleet of ~115 aircraft in 2022, back to pre-pandemic levels; plans to hire 500-800 staff.

Worldwide airlines

- **Air New Zealand** and **Airbus** announce MoU for researching flying hydrogen powered aircraft in New Zealand.
- **Cathay Pacific** commits to use 10% SAF by 2030; August passenger numbers down 95% on 2019; revises planned capacity for Q4 from 30% to 13%.
- **Emirates** launches campaign to recruit 3,000 cabin crew and 500 airport services staff at Dubai; plans to make an additional 165k A380 seats available in Oct/Nov.
- **Qatar Airways Group** reports a net loss of $4.1 billion for the year to end March 2021; it reduced employee numbers by 27% to 36,707 but is now looking to reemploy staff.
- **Singapore Airlines** reports 155,400 passengers in August, 95% down on 2019 and with a load factor of 17.5%.
- **United Airlines** reports 98.5% of its US staff have been vaccinated, ahead of its 27/9/21 deadline.

States (Daily Departure/Arrival flights)

Top 10

Rank evolution over 2 weeks	Top 10 States on Wed 29-09-2021				
	State	Flights (Dep/Arr)	Δ over 2 weeks	% over 2 weeks	% vs 2019
→	Germany	4047	↘ -46	-1%	↘ -39%
→	Spain	3460	↘ -113	-3%	↘ -30%
→	United Kingdom	3394	↘ -67	-2%	↘ -47%
→	France	3255	↗ +160	+5%	↘ -30%
↗	Turkey	2640	↘ -87	-3%	↘ -19%
↘	Italy	2625	↘ -176	-6%	↘ -32%
→	Greece	1465	↘ -147	-9%	↘ -8%
→	Norway	1306	↘ -2	-0%	↘ -20%
→	Netherlands	1252	↗ +12	+1%	↘ -33%
→	Poland	907	↘ -48	-5%	↘ -29%

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

- **Italy** (-176 flights; -6%) mainly driven by Alitalia, light aircraft operators, easyJet and Volotea. Mainly domestic flows, but also flows with Spain, Austria and France.
- **Greece** (-147 flights; -9%) mainly due to Olympic, Jet2.com, Vueling and Volotea. Domestic flows and flows with UK, Switzerland and Romania.
- **Spain** (-113 flights;-3%) owing to decreases from Vueling, Canarias Airlines, Volotea and Jet2.com. Domestic flows and flows with UK, Italy and Germany.

Increases for

- **France** (+160 flights; +5%) mainly due to light aircraft operators and Air France. Domestic flows and flows with Italy.

States (Daily Departure/Arrival flights)

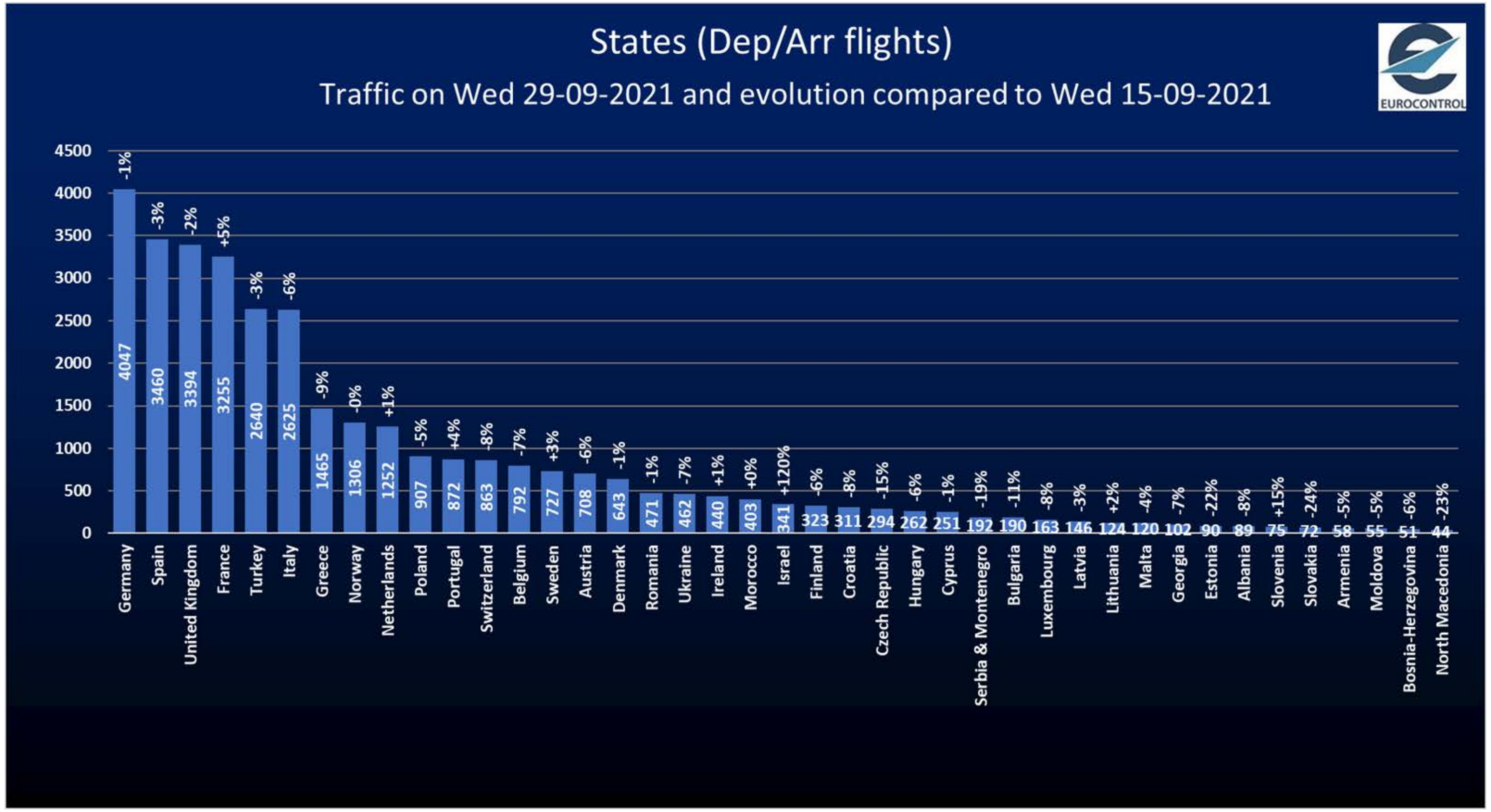
Top 10 over the last rolling week

Top 10 States
on Wed 29 September 2021 (Dep/Arr flights)

Rank	State	Flights	vs same day in 2019	over 2 weeks
1.	Germany	4,047 flights	↓39% of same day in 2019	↓1% over 2 weeks
2.	Spain	3,460 flights	↓30% of same day in 2019	↓3% over 2 weeks
3.	United Kingdom	3,394 flights	↓47% of same day in 2019	↓2% over 2 weeks
4.	France	3,255 flights	↓30% of same day in 2019	↑5% over 2 weeks
5.	Turkey	2,640 flights	↓19% of same day in 2019	↓3% over 2 weeks
6.	Italy	2,625 flights	↓32% of same day in 2019	↓6% over 2 weeks
7.	Greece	1,465 flights	↓8% of same day in 2019	↓9% over 2 weeks
8.	Norway	1,306 flights	↓20% of same day in 2019	↓0% over 2 weeks
9.	Netherlands	1,252 flights	↓33% of same day in 2019	↑1% over 2 weeks
10.	Poland	907 flights	↓29% of same day in 2019	↓5% over 2 weeks

States (Daily Departure/Arrival flights)

Latest traffic situation

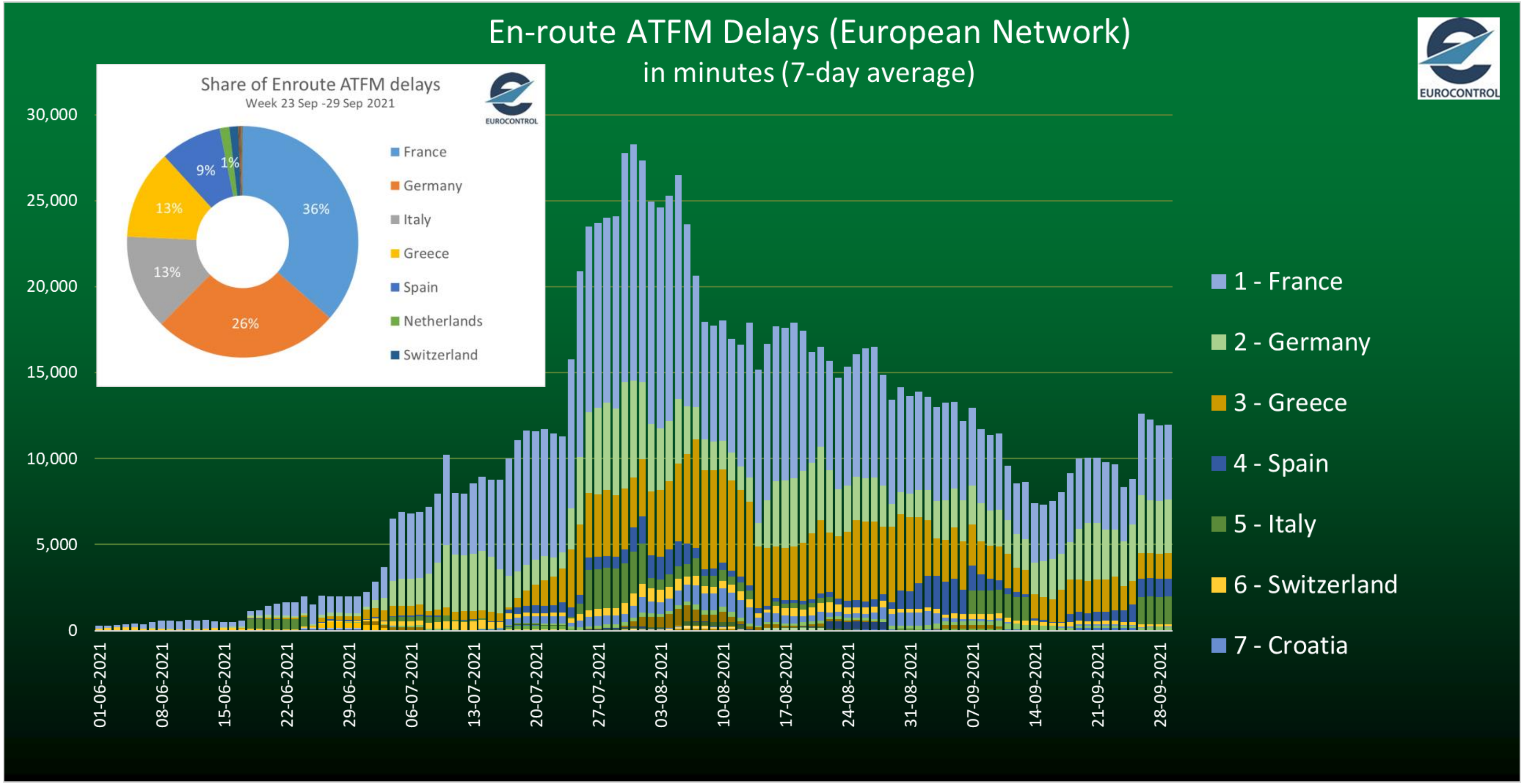


- Highest increases for **Israel** (+120% over 2 weeks, due to public holidays on 15-16 Sep.) and **Slovenia** (+15%).
- Decrease for **Slovakia** (-24%), **North Macedonia** (-23%) and **Estonia** (-22%).
- Traffic levels ranging from -55% (Finland) to +44% (Slovenia), compared to 2019.

Associations, Authorities, Industry and States

- **Algeria** closes airspace to aircraft from Morocco.
- **Boeing** projects that European airlines will need 7100 new narrow bodies and 1545 wide bodies between now and 2040.
- **Brazil ANAC** reports August domestic passenger numbers of 5.5 million, down 30% on 2019.
- **DFS** to dismantle 10 further VOR navigation beacons out of its current 57.
- **DGAC** reports France passenger numbers for August down 42% on 2019 (domestic -15%, international -48%).
- **ENAIRE** launches a masters degree in Air Navigation Services Management.
- Commercial operation resumed between **Malta** and **Libya**.
- **Shell** plans to produce around 2 million tonnes p/a of SAF by 2025 and for SAF to reach 10% of its global aviation fuel sales by 2030.
- **Spain** approves €2.3 billion in airport infrastructure investments from 2022 to 2026 and a freeze on Aena's airport tariffs.
- **UK** and **US** – significant increase in bookings to/from both countries reported by several operators following relaxation of travel restrictions.

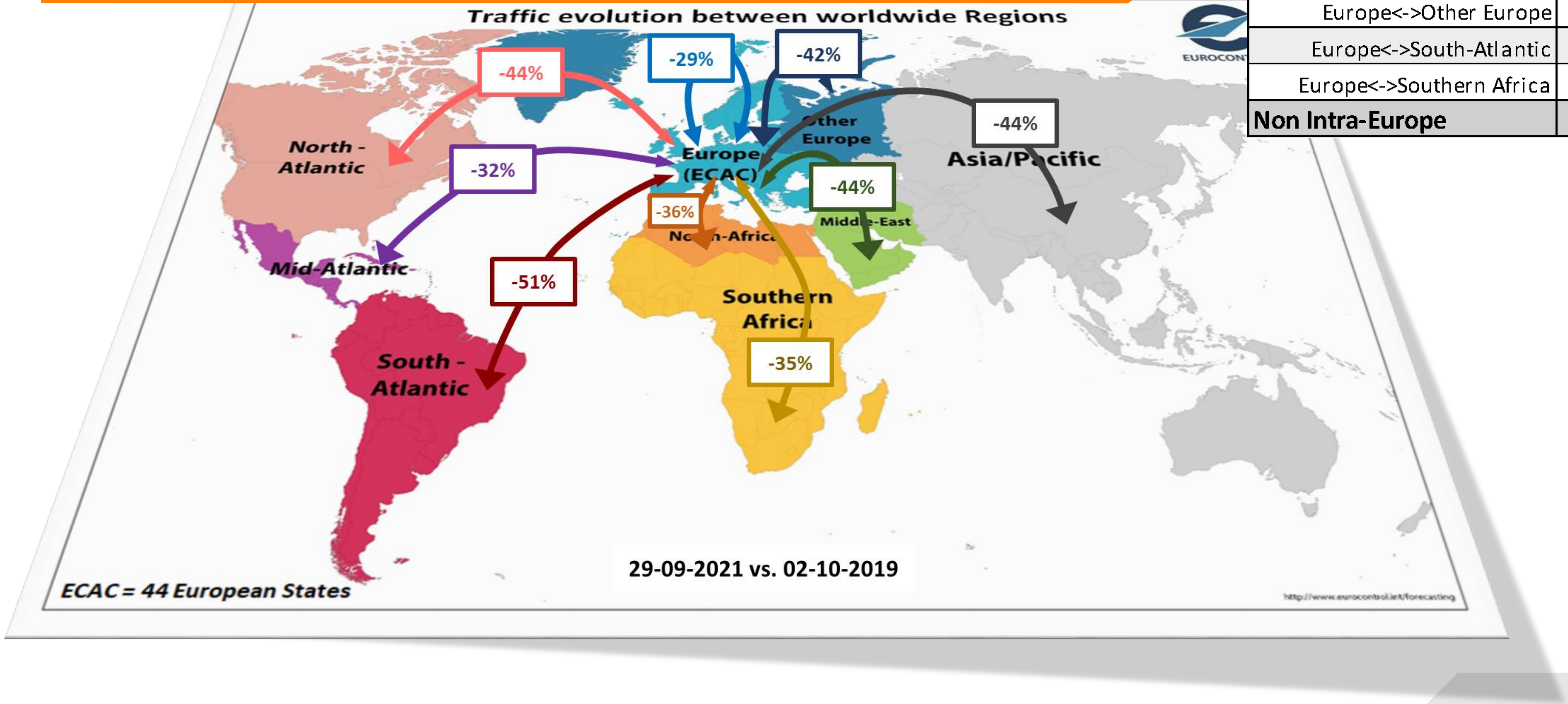
En-route ATFM delays



- En-route ATFM delays have started to rise since end June and reached a maximum early August. Since then they have decreased but September has seen some weather delays.
- Major contributors over the last 7 days: **France** (36% of all en-route ATFM delays), **Germany** (26%), **Italy** (13%), **Greece** (13%) and **Spain** (9%).

Traffic flows (Daily Departure/Arrival flights)

- The main traffic flow is the intra-Europe flow with 19,228 flights on Wednesday 29 September, which is decreasing (-3%) over 2 weeks.
- Intra-Europe flights are at -29% compared to 2019 while intercontinental flows are at -42%.



REGION	15-09-2021	29-09-2021	%	vs. 2019
Intra-Europe	**19,228**	**18,742**	***-3%***	***-29%***
Europe<->Asia/Pacific	463	453	*-2%*	*-44%*
Europe<->Mid-Atlantic	100	95	*-5%*	*-32%*
Europe<->Middle-East	845	893	*+6%*	*-44%*
Europe<->North Atlantic	749	742	*-1%*	*-44%*
Europe<->North-Africa	638	590	*-8%*	*-36%*
Europe<->Other Europe	696	702	*+1%*	*-42%*
Europe<->South-Atlantic	89	90	*+1%*	*-51%*
Europe<->Southern Africa	207	198	*-4%*	*-35%*
Non Intra-Europe	**3,787**	**3,763**	***-1%***	***-42%***

Country pairs (Daily Departure/Arrival flights)

Top 10

Rank evolution over 2 weeks	Country-Pair	Dep/Arr Flights	Δ over 2 week		% over 2 week	% vs 2019	
	Top 10 Country-Pair on Wed 29-09-2021						
↗	France <-> France	1081	↗	+158	+17%	↘	-17%
↘	Spain <-> Spain	1062	↘	-32	-3%	↘	-17%
↗	Norway <-> Norway	922	↗	+3	+0%	↘	-2%
↘	Turkey <-> Turkey	882	↘	-48	-5%	↘	-4%
→	United Kingdom <-> United Kingdo	793	↘	-14	-2%	↘	-31%
↘	Italy <-> Italy	751	↘	-56	-7%	↘	-10%
→	Germany <-> Germany	634	↗	+4	+1%	↘	-43%
→	Spain <-> United Kingdom	447	↘	-31	-6%	↘	-42%
→	Germany <-> Spain	421	↘	-17	-4%	↘	-35%
→	Greece <-> Greece	370	↘	-19	-5%	↘	-5%

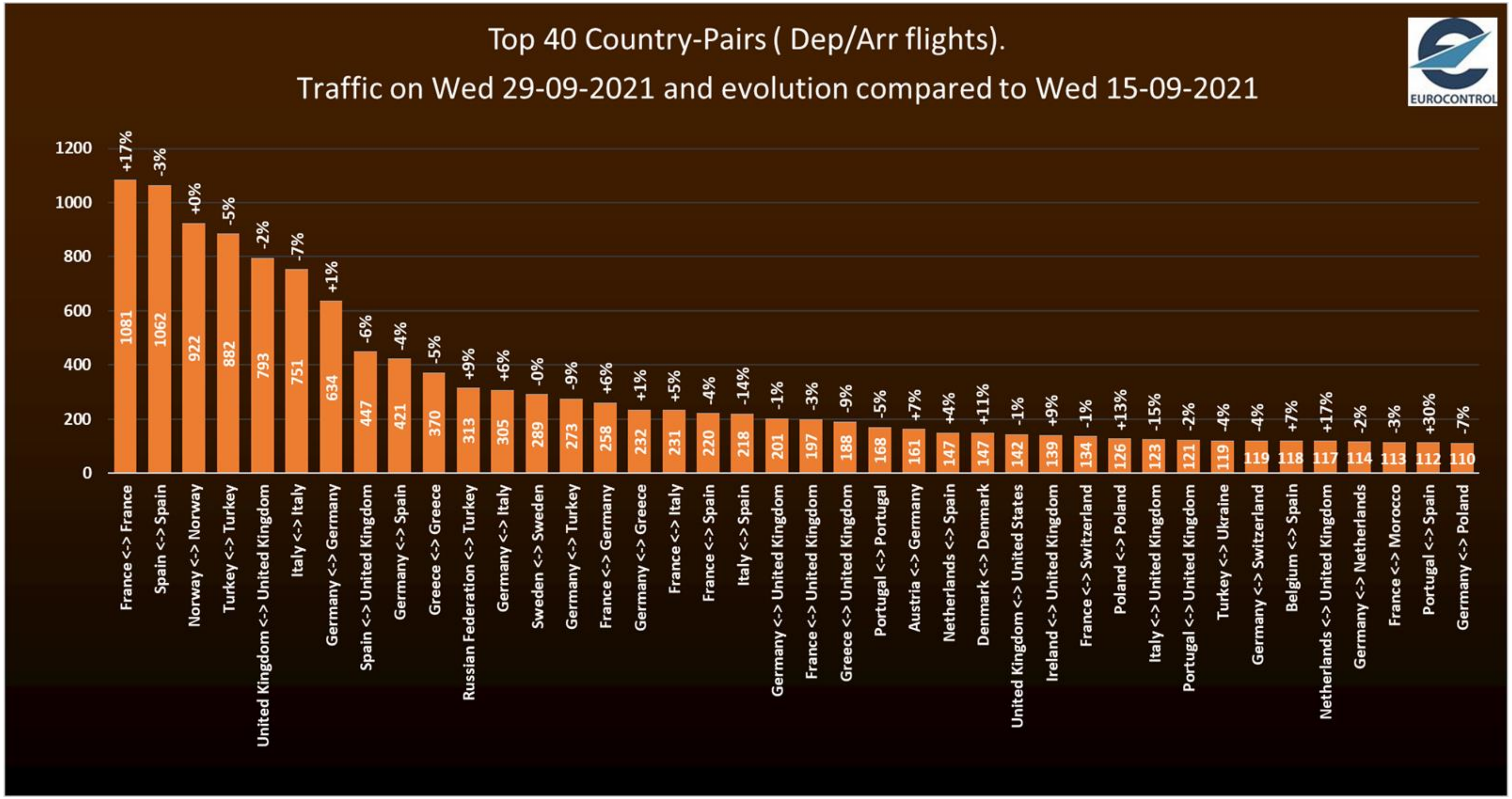
- 8 of the top 10 flows are domestic.

Mixed picture over the last two weeks:

- **Highest increases** for:
  - **France-France** (+158 flights; +17%) owing to light aircraft operators, Air France.
- **Highest decreases** for
  - **Italy-Italy** (-56 flights; -7%) mainly due to Alitalia, Volotea, easyJet.
  - **Turkey-Turkey** (-48 flights; -5%) owing to Turkish and Pegasus.
  - **Spain-Spain** (-32 flights; -3%) owing to Vueling, Canarias Airlines and Volotea.

Country pairs (Daily Departure/Arrival flights)

Latest traffic situation

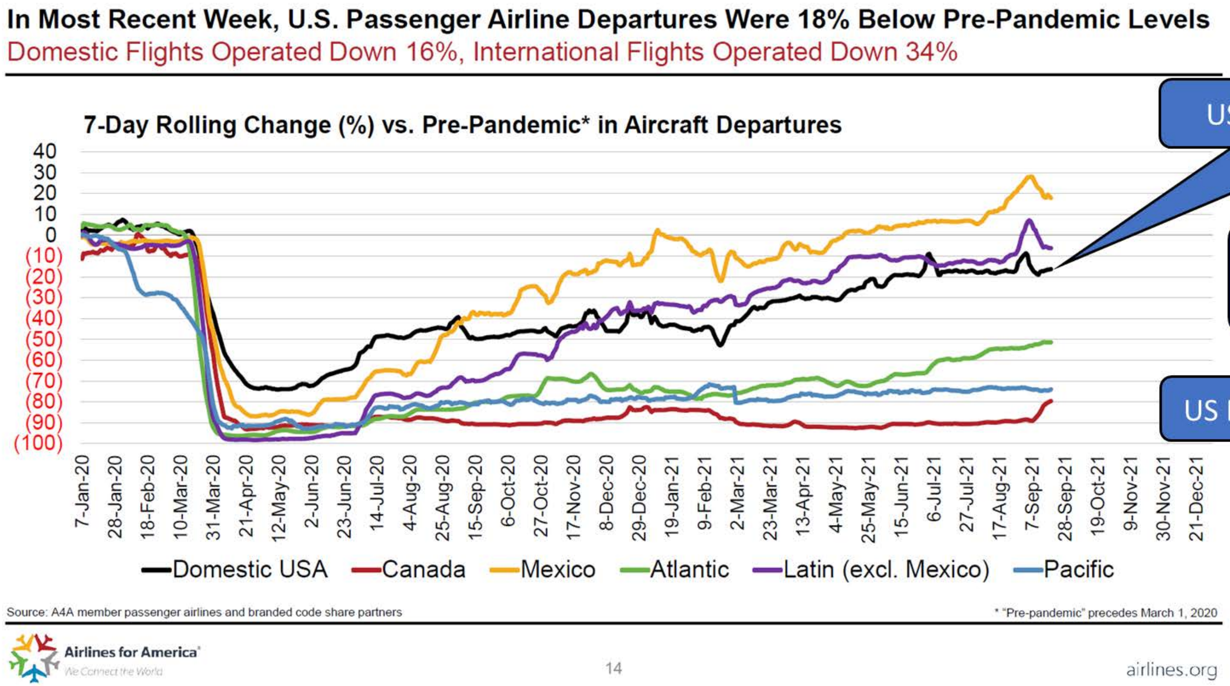


- Flows recording the biggest **increases** over two weeks:
  - **Portugal-Spain** (+30%) owing to light aircraft operators, Netjets, TAP.
  - **France-France** (+17%) mainly due to light aircraft operators and Air France.
  - **Netherlands-UK**(+17%)
- Flows recording the biggest **decreases** over two weeks:
  - **Italy-UK** (-15%) owing to Ryanair, light aircraft operators, Air Hamburg.
  - **Italy-Spain** (-14%)
  - **Greece-UK** (-9%)

Outside Europe

USA

- On 27 September, US passenger airline departures were 18% below 2019 levels with domestic down 16% and international down 34%.
- The domestic US load factor is 77.1%. Since mid-August, it has fallen below pre-pandemic levels.
- In most recent week, average airfares on tickets sold were 31% below pre-pandemic levels.
- To be noted the traffic increase with Canada since 7 September 2021.
- From early November, vaccinated, pre-flight tested Europeans will again be able to travel to the US.



US Domestic flights: **-16%**

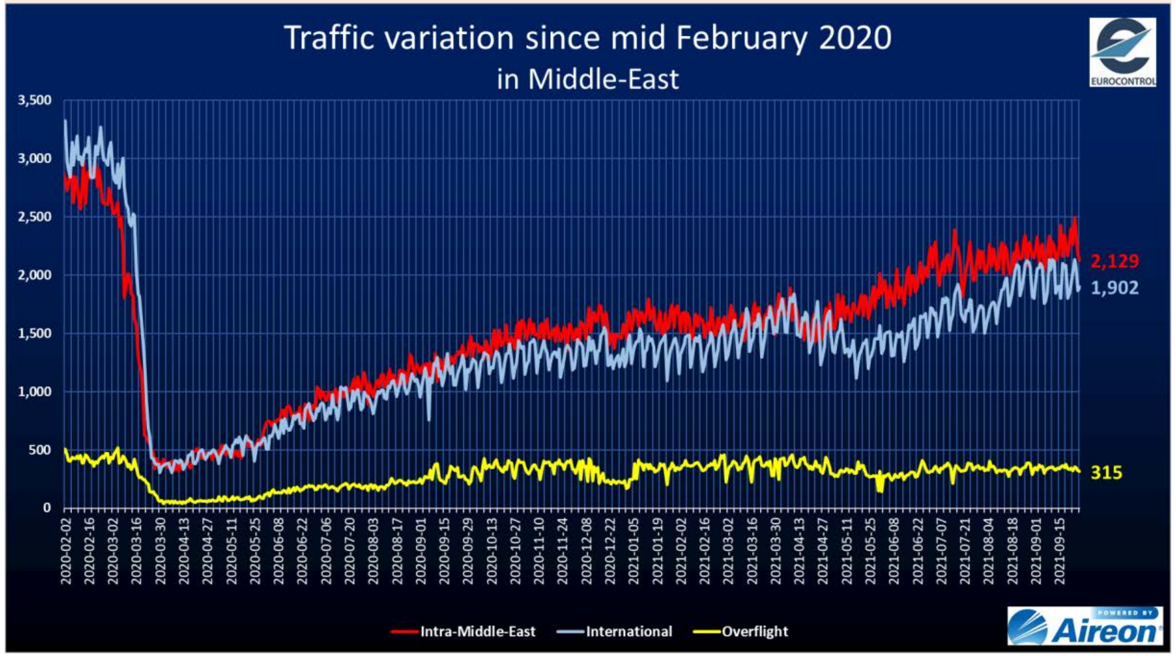
Worldwide departures: **-18% below 2019 levels**

US International flights: **-34%**

Outside Europe

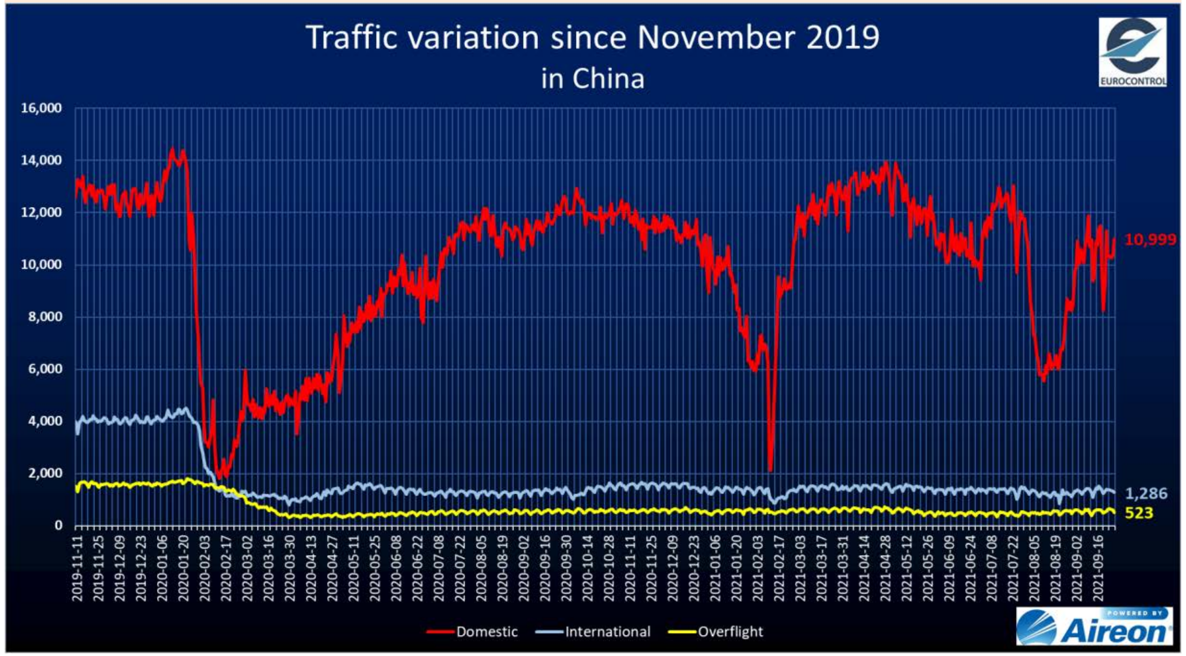
Middle East

- On 28 September, intra Middle-East traffic recorded 2,129 flights (-23% compared to Feb 2020).
- International traffic from and to Middle-East recorded 1,902 flights (-37% compared to Feb 2020).
- Overflights recorded 315 flights (-26% compared to Feb 2020).



China

- Tightened travel restrictions (Delta variant spread) resulted in domestic flights down to -50% (vs Jan. 2020) early August. After a quick rebound, situation seems to stabilize with flights being at -8% (10,999 flights) on 27 Sep 2021.
- International flights also impacted by the outbreak, recorded 1,286 flights (-68%) compared to 1 Jan 2020. Overflights remain suppressed with 523 flights (-67%).



Airports (Daily Departure/Arrival flights)

Top 10 and latest news

Rank evolution over 2 weeks	Top 10 Airports on Wed 29-09-2021				
	Airport	Dep/Arr Flights	∆ over 2 weeks	% over 2 weeks	% vs 2019
	Amsterdam	1000	+16	+2%	-35%
	IGA Istanbul Airport	965	-1	-0%	-22%
	Frankfurt	844	-39	-4%	-45%
	Paris/Charles-De-Gaulle	812	+11	+1%	-45%
	Madrid/Barajas	767	+15	+2%	-39%
	London/Heathrow	699	+15	+2%	-49%
	Antalya	689	-7	-1%	-19%
	Barcelona	664	-26	-4%	-37%
	Munich	587	-30	-5%	-54%
	Istanbul/Sabiha Gokcen	572	-21	-4%	-10%

Balanced picture in changes over the last 2 weeks:

Decreases for:

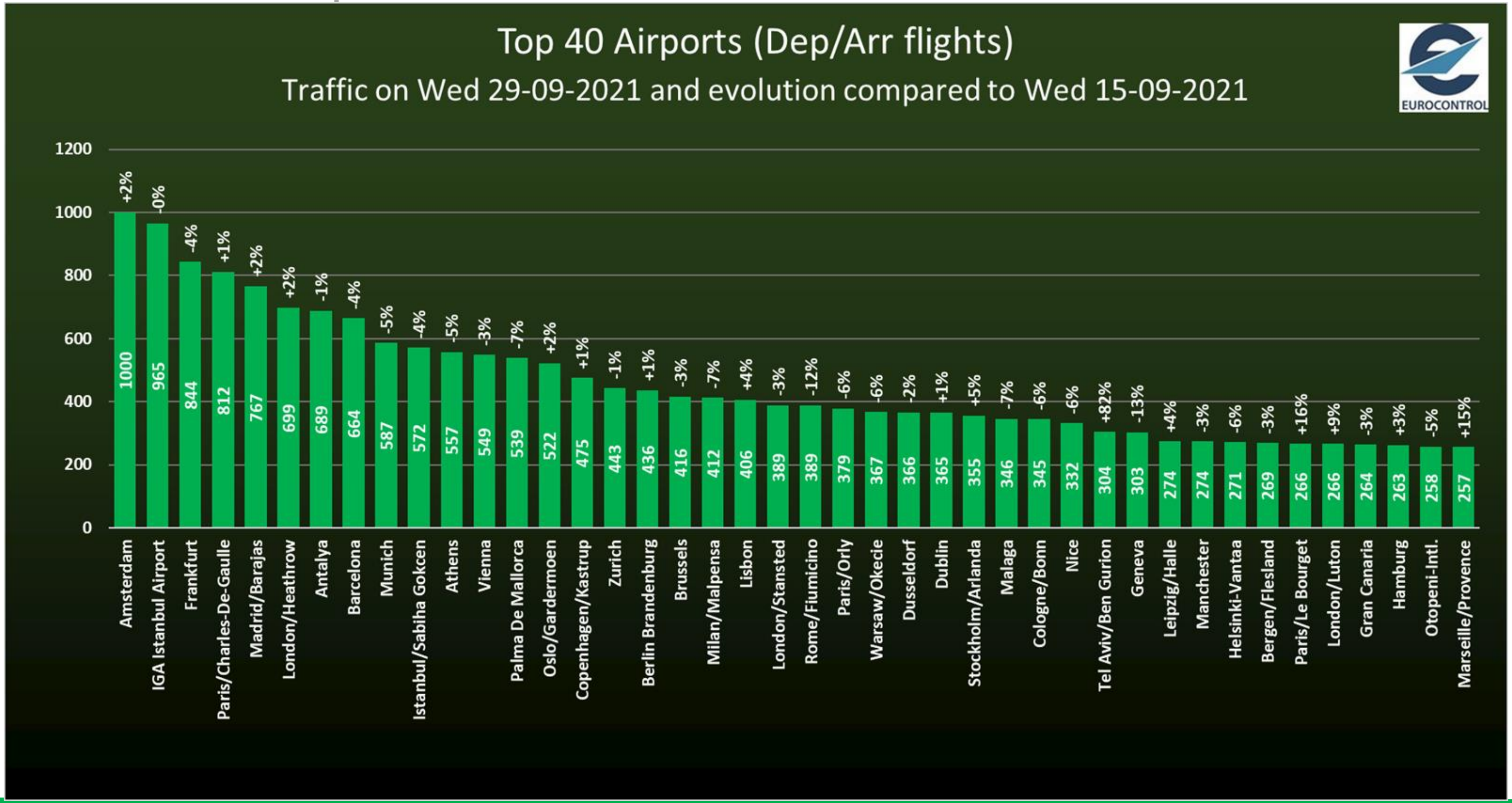
- **Frankfurt** (-39 flights; -4%) due to light a/c operators, Condor and SunExpress. Domestic flows as well as flows with France and Croatia.
- **Munich** (-30 flights; -5%) mainly due to Lufthansa and light a/c operators and domestic flows.
- **Barcelona** (-26 flights; -4%) mainly due to Vueling and light a/c operators on flows with Italy, Germany and Morocco.

Highest **increase** in flights for:

- **Amsterdam** (+16 flights; +14%) due to KLM and easyJet .
- **Madrid** (+15 flights; +2%) owing to business jet operators (Netjets, Gestair Executive).
- **London Heathrow** (+15 flights; +2%).

Airports (Daily Departure/Arrival flights)

Latest operations



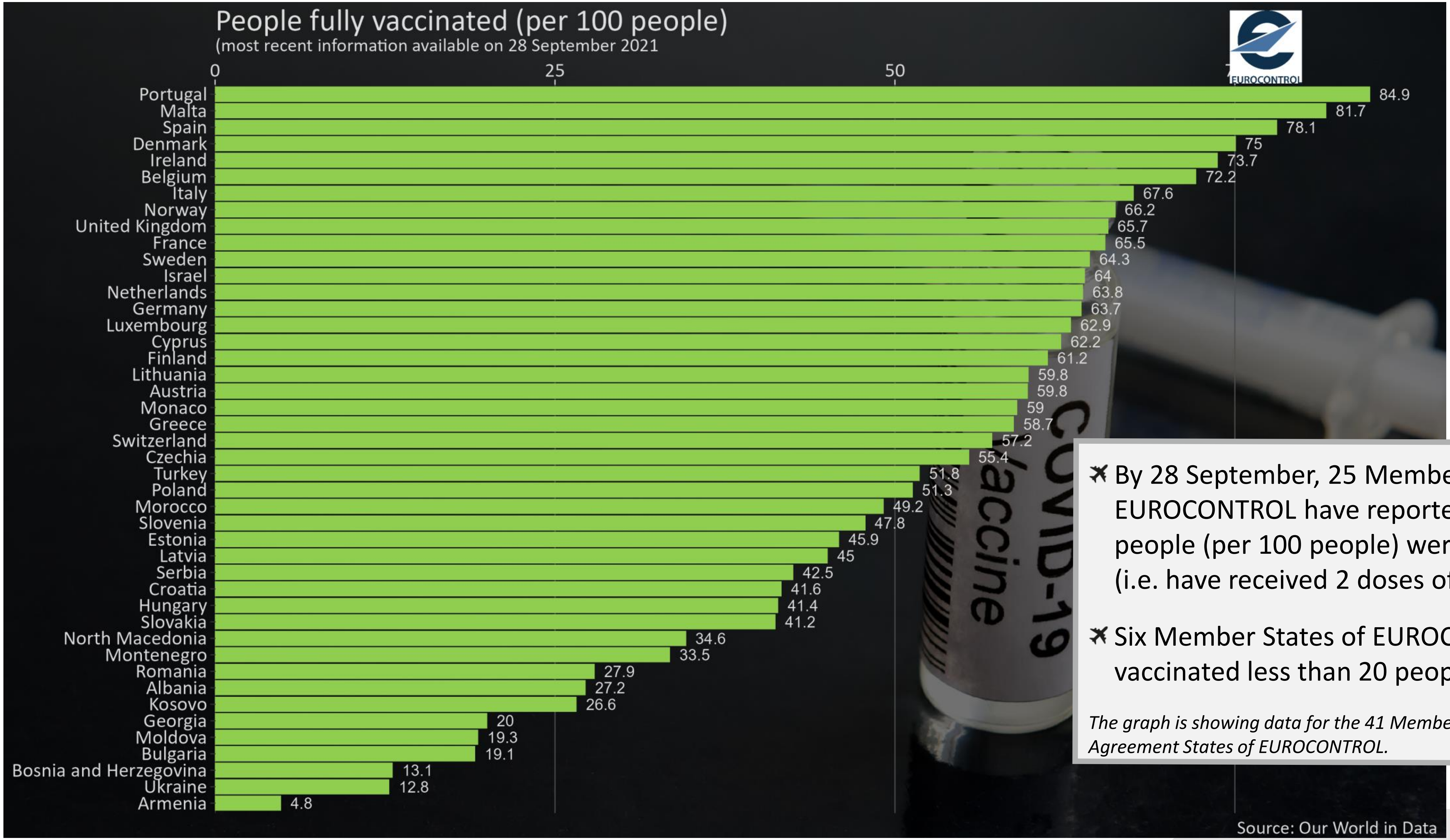
- Largest increase in flights over 2 weeks for **Tel Aviv** (+82%), **Paris-Le Bourget** (+16%), **Marseille** (+15%).
- Largest decreases for **Geneva** (-13%) and **Rome-Fiumicino** (-12%).
- Traffic levels ranging from -76% (Gatwick) to -18% (Nice) compared to 2019.

Airports

Latest news

- **Amsterdam Schiphol Airport** to run a project on whether foraging pigs will deter birds.
- **Berlin Brandenburg Airport** reports its liquidity is secured until February but is keeping Terminal 2 out of operation and extending short-time work, both for the rest of 2021.
- **Cape Town Airport** August passenger numbers of 293,462, 66% down on 2019 (domestic -63%, international -80%); for 1-12 September, pax numbers reached 49% of 2019 levels.
- **Groupe ADP** CEO de Romanet says he does not expect pre-pandemic traffic levels to return until 2025-27.
- **Johannesburg Airport** August passenger numbers of 567,516, 70% down on 2019 (domestic -60%, international -81%).
- **Leipzig/Halle Airport** August passenger numbers down 56% on 2019 but cargo up 31%.
- **Los Angeles International Airport** August passenger numbers down 37% on 2019 to 5.1 million (domestic -26%, international -62%).
- **Singapore Changi Airport** report August passenger numbers of 211 thousand, 96% down on 2019.

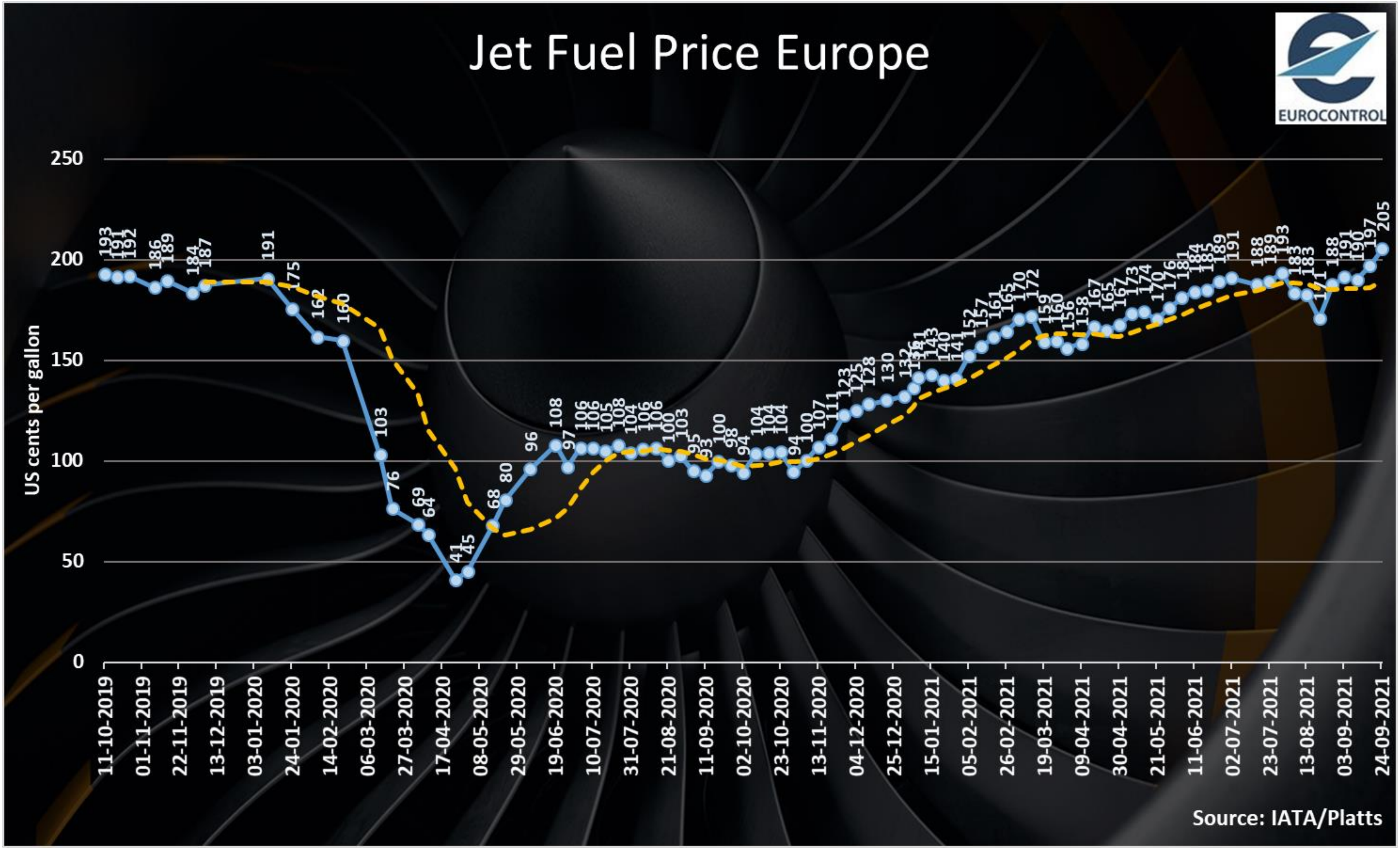
Vaccination updates



- By 28 September, 25 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).
- Six Member States of EUROCONTROL have fully vaccinated less than 20 people (per 100 people).

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

Economics



- **Jet fuel prices** have started to rise since last Autumn, from around 100 cts/gal in October 2020 to **205 cts/gal on 24 September 2021**.
- While not shown on the graph, they last reached a price above 200 cts/gal in May 2019.
- Since May, jet fuel prices have been gradually rising, with a strong increase over the beginning of September 2021 adding pressure on airlines' costs.
- Experts in oil industry report that the current global oil supply-demand deficit is larger than expected.

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