COVID 19 IMPACT ON EUROPEAN AVIATION

EUROCONTROL Comprehensive Assessment

SUPPORTING EUROPEAN AVIATION
Traffic Situation

Daily flights (including overflights)

Traffic over the last 7 days is

\[ \downarrow 26\% \]

Compared to equivalent days in 2019

Headlines

- **16,281 flights** (63% of 2019 levels) on Wed 12 January 2022, decreasing over 2 weeks (-19%).
- Over the first weeks of 2022, European traffic is recording major flight reductions as the Omicron wave expands, slackening the expected recovery.
- In 2021, number of flights in Europe was 56% of 2019 levels, totalling 6.2 million.
- Yesterday, Ryanair was the busiest Aircraft Operator with 905 flights, followed by Turkish Airlines (888), Lufthansa (669), Air France (658) and KLM (521).
- Domestic traffic vs 2019: Europe (-39%), USA (-21%), China (-24%), and Middle-East (-13%).
- Flights to/from Europe (intercontinental flows) are at -31% vs 2019 on 12 January.
- Jet fuel prices recorded an 11% rise to 233 cts/gallon between 24 Dec 2021 and 7 Jan 2022.
- Charter (+35%), All-cargo (+3%) and Business Aviation (+9%) are above 2019 levels. The two other segments still below 2019 levels with: Traditional at -33% vs 2019 and Low-cost at -34%.

Top 10 Aircraft Operators on Wed 12 January 2022 (daily flights)

1. **Ryanair Group**
   - Operated 905 flights
   - Down 49% of same day in 2019
   - Down 55% over 2 weeks

2. **Turkish Airlines**
   - Operated 888 flights
   - Down 27%
   - Down 8% over 2 weeks

3. **Lufthansa Airlines**
   - Operated 669 flights
   - Down 53%
   - Down 20% over 2 weeks

4. **Air France Group**
   - Operated 658 flights
   - Down 42%
   - Down 55% over 2 weeks

5. **KLM Group**
   - Operated 521 flights
   - Down 28%
   - Down 20% over 2 weeks

6. **Wizz Air Group**
   - Operated 372 flights
   - Down 17%
   - Down 46% over 2 weeks

7. **SAS Group**
   - Operated 342 flights
   - Down 53%
   - Down 17% over 2 weeks

8. **British Airways Group**
   - Operated 332 flights
   - Down 59%
   - Down 24% over 2 weeks

9. **DHL Group**
   - Operated 324 flights
   - Up 19%
   - Up 13% over 2 weeks

10. **Wideroe**
    - Operated 322 flights
    - Down 11%
    - Up 11% over 2 weeks

Top 10 Busiest States on Wed 12 January 2022 (Dep/Arr flights and variation over 2 weeks)
Top 10 Busiest Airports
7-day average Dep/Arr flights on 6–12 Jan. 2022, compared to 2019

Traffic Flow
On 12 January, the *intra-European* traffic flow was

12,167 flights -22%

over past 2 weeks

-39%

Compared to 2019

Market Segments
On 12 Jan, compared to 2019

- 34% Low cost
- 33% Traditional
- 9% Business Aviation
- 35% Non-Scheduled/Charter
- 3% All Cargo

Economics
(7 January 2022)
Fuel price

$233 Cents/gallon
compared to
209 cents/gallon on 24 Dec 2021

Source: IATA/Platts
Overall traffic situation at network level

- **16,281 flights** on Wednesday 12 January.
- **-19%** with **-3,833 flights** over 2 weeks (from Wednesday 29 December).
- **-15%** with **-2,932 flights** over 1 week (from Wednesday 5 January).
- **63%** of 2019 traffic levels on Wednesday 12 January.
Since early September, number of daily flights has slowly decreased, except at the start of the Christmas break (increased demand related to holidays).

Since the beginning of the year 2022, the number of flights continued to decrease due to the tightened travel restrictions to fight the Omicron wave.

The traffic at network level reached its maximum on Friday 27 August 2021 with 26,773 flights (-27.7% vs 2019).
Current situation compared to the latest EUROCONTROL traffic scenarios

For the first 12 days of January 2022, network traffic was at 75% compared to the same period in 2019.

Network traffic is between the low and the base scenarios of the EUROCONTROL traffic scenarios published on 15 October 2021.
On 12 January 2022, compared to 2019, and excluding the peaks during the Christmas & New Year break:

- Three segments are above 2019 levels: **All-cargo** (+3%), and **Charter** (+35%), both stable since early November. **Business Aviation** (+9%) slow down over the last weeks, owing to tightened travel restrictions (Omicron).

- Since early November, **Traditional** have stabilized at -33% vs 2019 while **Low-Cost**, after having reached a maximum of -18% end October, have gradually decreased to reach -34% vs 2019, also affected by the new variant.
## Aircraft operators (Daily flights)

### Top 10

<table>
<thead>
<tr>
<th>Rank evolution over 2 weeks</th>
<th>Top 10 Aircraft Operators on Wed 12-01-2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aircraft Operator</td>
<td>Flights</td>
</tr>
<tr>
<td>----------------------------</td>
<td>---------</td>
</tr>
<tr>
<td>Ryanair Group</td>
<td>905</td>
</tr>
<tr>
<td>Turkish Airlines</td>
<td>888</td>
</tr>
<tr>
<td>Lufthansa Airlines</td>
<td>669</td>
</tr>
<tr>
<td>Air France Group</td>
<td>658</td>
</tr>
<tr>
<td>KLM Group</td>
<td>521</td>
</tr>
<tr>
<td>Wizz Air Group</td>
<td>372</td>
</tr>
<tr>
<td>SAS Group</td>
<td>342</td>
</tr>
<tr>
<td>British Airways Group</td>
<td>332</td>
</tr>
<tr>
<td>DHL Group</td>
<td>324</td>
</tr>
<tr>
<td>Wideroe</td>
<td>322</td>
</tr>
</tbody>
</table>

Within the top 10, all but one airline posted decreases over 2 weeks, highest being:

- **Ryanair** (-1,101 flights; -55%) mainly due to Ireland-UK, domestic Italy, Spain-UK and Poland-UK.
- **Wizz Air** (-323 flights, -46%) due to decreases on Italy-Romania, Poland-UK, Romania-UK and Bulgaria-Germany.
- **Lufthansa** (-171 flights; -20%) mainly due to German domestic flows, as well as Germany-Spain, Germany-UK and Germany-Italy.

Over the top 10, the **only (slight) increase** is for:

- **DHL group** (+37 flights; +13%)
Highest decreases in flights for **Ryanair** (-55%), **easyJet** (-74%), **Wizz Air** (-46%) and **Vueling** (-63%).

Highest increases for cargo operators **DHL Group** (+13%), **ASL** (+1%) and **Fedex** (+5%).

Traffic levels ranging from -75% (**Eurowings**) to +6% (**Loganair**) vs 2019.
Air France-KLM signs MoU with Airbus for the firm order of 100 A320neos with options for an additional 60 with deliveries commencing in late 2023; KLM announces that it will add 0.5% SAF to all services departing Amsterdam.

Austrian Airlines mandate FFP2 masks for services to and from Austria; reportedly plan to introduce mandatory vaccination for flight crew on long haul services.

easyJet partners with Cranfield Aerospace on the development of zero emission aircraft, such as those using hydrogen propulsion.

IAG and Globalia terminate the acquisition agreement for Air Europa, with IAG paying a total of €75 million; they are looking for another structure to allow the deal to happen; European Commission confirms that the competition concerns had not been adequately addressed; IAG aiming for around 90% of capacity in summer 2022.

Lufthansa planning over 160 destinations in summer 2022 from Frankfurt and Munich with intra-European flights “almost reaching the 2019 level with around 5,000 weekly flights”; Lufthansa Group cancelling 33,000 (~10%) of its flights in January/February as a result of weak demand.

Finnair reports 2.9 million passengers in 2021, 80.5% fewer than in 2019 (domestic -70%, Europe -79%, North Atlantic -79%, Asia -95%).

Royal Air Maroc cancels all international services until the end of January.

Ryanair announces that it expects a net loss for the financial year to end March 2022 of €250m - €450m, worse than pre-Omicron, and cuts its planned January schedule by 33%; reports 9.5 million passengers in December, 8% fewer than in 2019 and with a load factor of 81%; plans to close its Frankfurt am Main base at the end of May.

SAS reports 9.2 million passengers in 2021, 69.2% fewer than in 2019, with a load factor of 52.4%.

TAP Portugal restructuring aid of €2.55 billion and additional aid of €71.4 million approved by European Commission; Portugal’s Minister of Infrastructure welcomes this but says the group will have to join a larger group in the sector.

Turkish Airlines expect to receive 8 new narrowbodies and 10 new widebodies in 2022 (its fleet expanded in 2021 by 21 to a total of 373); report 44.8 million passengers in 2021, 39.7% fewer than in 2019 and with a load factor of 67.9% (December 4.3 million, -21.3%, 71.1%).

Wizz Air acquires 15 daily slot pairs from Norwegian Air Shuttle at London Gatwick and announces new routes from March/April.

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Qantas international cabin crew reject a new agreement imposing a two year pay freeze and changed rostering conditions with 97.5% voting against.

Etihad to transfer several aviation support service businesses to ADQ in order to focus on its Airline business.

Cathay Pacific announces cancellations of passenger flights to/from Hong Kong with only a skeleton passenger flight schedule in January.

Air New Zealand providing onboard snacks on domestic services when passengers disembark, rather than during the flight.

ANA report 1.2 million domestic passengers over Christmas/New Year, 30% fewer than in 2019 (international -91.3%).
Within the top 10, all States posted flight decreases over two weeks, biggest being:

☞ **UK** (-1,072 flights; -33%) mainly due to easyJet and Ryanair. Flows with Spain, Ireland and Italy as well as domestic flow.

☞ **Spain** (-972 flights; -30%) mainly due to Vueling and Ryanair. Domestic flows and flows with UK, Germany, Italy and France.

☞ **Italy** (-896 flights; -36%) mainly due to Lufthansa and Ryanair. Domestic flows, France-Italy, Spain-Italy and Italy-UK.

☞ **Germany** (-469 flights; -15%) due to light AOs, Swiss and easyJet. Flows with Spain, Italy and UK.

☞ **UK** is the State with the highest number of dep/arr flights (3,503) followed by **Germany** (3,382), **France** (3,062), **Spain** (2,876) and **Italy** (2,307).

☞ Over 2 weeks, UK and Switzerland increased their ranking while Germany decreased.
# States (Daily Departure/Arrival flights)

Top 10 over the last rolling week

<table>
<thead>
<tr>
<th>Rank</th>
<th>State</th>
<th>Flights</th>
<th>% Decrease</th>
<th>% Decrease 2 weeks</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Germany</td>
<td>2,703</td>
<td>48%</td>
<td>15%</td>
</tr>
<tr>
<td>2.</td>
<td>France</td>
<td>2,366</td>
<td>34%</td>
<td>13%</td>
</tr>
<tr>
<td>3.</td>
<td>Spain</td>
<td>2,299</td>
<td>31%</td>
<td>30%</td>
</tr>
<tr>
<td>4.</td>
<td>United Kingdom</td>
<td>2,152</td>
<td>53%</td>
<td>33%</td>
</tr>
<tr>
<td>5.</td>
<td>Turkey</td>
<td>1,593</td>
<td>26%</td>
<td>11%</td>
</tr>
<tr>
<td>6.</td>
<td>Italy</td>
<td>1,588</td>
<td>42%</td>
<td>36%</td>
</tr>
<tr>
<td>7.</td>
<td>Netherlands</td>
<td>929</td>
<td>36%</td>
<td>24%</td>
</tr>
<tr>
<td>8.</td>
<td>Norway</td>
<td>928</td>
<td>34%</td>
<td>21%</td>
</tr>
<tr>
<td>9.</td>
<td>Switzerland</td>
<td>693</td>
<td>44%</td>
<td>19%</td>
</tr>
<tr>
<td>10.</td>
<td>Poland</td>
<td>626</td>
<td>34%</td>
<td>21%</td>
</tr>
</tbody>
</table>
States (Daily Departure/Arrival flights)

Latest traffic situation

- Highest decreases in flights for UK (-33% over 2 weeks), Spain (-30%) and Italy (-36%).
- Highest (slight) increase for Slovakia (+41%).
- Traffic levels ranging from -76% (Morocco) to 13% (Albania), compared to 2019.
ACI Europe welcomes a decision by the European Commission to set a minimum 64% airport slot usage threshold for the summer 2022 season (up from the current 50% but short of the normal 80%).

European Commission to review France’s proposed ban on short haul flights where a rail alternative of <2.5 hours is available.

IATA projects that European carriers will take delivery of ~419 aircraft this year, up 60% from 2021.

Airbus reports that it delivered 611 commercial aircraft in 2021, 45 more than in 2020; 483 of these were from the A320 family.

ATR gains approval from EASA to extend type C maintenance intervals from 5,000 flight hours to 8,000.

Boeing reports that it delivered 340 commercial aircraft in 2021, 181 more than in 2020; 263 of these were 737s.

Argentina reports 7.7 million passengers in 2021, 74.8% fewer than in 2019 (domestic -63.5%, international -85.4%).

Italy requires a ‘Super Green Pass’ (vaccination/recovery, not testing) for domestic flights.

Ireland’s government announces €108 million in additional funding for airports.

Japan reports 20,700 tourist arrivals in November, 99.2% down on November 2019.
Major contributors over the last 7 days: Germany (31% of all en-route ATFM delays), France (26%), Spain (15%), Switzerland (13%) and Portugal (6%).
Traffic flows (Daily Departure/Arrival flights)

The main traffic flow is the intra-Europe flow with 12,167 flights on Wednesday 12 January, which is decreasing (-22%) over 2 weeks.

Intra-Europe flights are at -39% compared to 2019 while intercontinental flows are at -31%.
**Country pairs** (Daily Departure/Arrival flights)

**Top 10**

<table>
<thead>
<tr>
<th>Rank evolution over 2 weeks</th>
<th>Top 10 Country-Pair on Wed 12-01-2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Country-Pair</td>
<td>Dep/Arr Flights</td>
</tr>
<tr>
<td>France &lt;-&gt; France</td>
<td>896</td>
</tr>
<tr>
<td>Spain &lt;-&gt; Spain</td>
<td>817</td>
</tr>
<tr>
<td>Norway &lt;-&gt; Norway</td>
<td>631</td>
</tr>
<tr>
<td>United Kingdom &lt;-&gt; United Kingdom</td>
<td>581</td>
</tr>
<tr>
<td>Italy &lt;-&gt; Italy</td>
<td>571</td>
</tr>
<tr>
<td>Turkey &lt;-&gt; Turkey</td>
<td>513</td>
</tr>
<tr>
<td>Germany &lt;-&gt; Germany</td>
<td>451</td>
</tr>
<tr>
<td>Germany &lt;-&gt; Spain</td>
<td>227</td>
</tr>
<tr>
<td>Sweden &lt;-&gt; Sweden</td>
<td>206</td>
</tr>
<tr>
<td>Greece &lt;-&gt; Greece</td>
<td>203</td>
</tr>
</tbody>
</table>

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

- **Spain-Spain** (-189 flights; -19%) owing to Vueling, Ryanair and Air Europa. From/to Barcelona and Palma de Mallorca, mainly.
- **Italy-Italy** (-151 flights; -21%) owing to Ryanair, Volotea and. Mainly from/to Sicilian airports, Milano and Napoli.
- **Germany-Spain** (-127 flights; -36%) owing to Eurowings, Ryanair and Lufthansa. Mainly from/to Palma de Mallorca, Munich, Barcelona, Koln and Malaga.

**Highest increase** for

- **France-France** (+211 flights; 31%) mainly due light AO, training and military flights as well as Air France.
- **Germany-Germany** (+87 flights; 24%) mainly due to light AO and Germanwings.

９ of the top 10 flows are domestic.

**France-France** is the Country-Pair with the highest number of dep/arr flights (896) followed by **Spain-Spain** (817), **Norway-Norway** (631), **UK-UK** (581), **Italy-Italy** (571), **Turkey-Turkey** (513) and **Germany-Germany** (451).

Over 2 weeks, domestic flows in France, UK, Germany and Sweden as well as flows between Germany and Spain increased their ranking.
Country pairs (Daily Departure/Arrival flights)

Latest traffic situation

- Highest increase in flights for **France-France** (+31% over 2 weeks), followed by **Germany-Germany** (+24%).
- Highest decreases for **Germany-Spain** (-36%), **Spain-Spain** (-19%) and **Italy-Italy** (-21%).
Outside Europe

USA

**During the week 25-31 December, US passenger airline departures deteriorated and were 21% below pre-pandemic levels with domestic down 21%. International flights were 22% below 2019 levels.**

**The domestic US load factor was circa 84% during the week ending 2 January 2022, below pre-pandemic levels.**

**In 25-31 December, average airfares on tickets sold were 10% below pre-pandemic levels.**
Outside Europe

Middle East

- Intra-Middle-East traffic recorded 2,404 daily flights on 11 January 2022 (-13% compared to Feb 2020).
- International traffic from and to Middle-East recorded 2,114 flights (-30% compared to Feb 2020).
- Overflights recorded 401 flights (-6% compared to Feb 2020) over the recent weeks.

China

- Chinese domestic flights have been slowly increasing over recent weeks; flights were down -24% (9,005 flights) on 10 January (vs 1 Jan 2020).
- International traffic from and to China recorded 1,289 flights (-68%) compared to 1 Jan 2020.
- Overflights were stable and recorded 542 flights (-66%) compared to 1 Jan 2020.
Airports (Daily Departure/Arrival flights)

Top 10 and latest news

Within the top 10, all airports recorded decreases over two weeks:

- **Barcelona** (-246 flights; -36%) mainly due to Vueling, Ryanair and easyJet on domestic flows in Spain, Italy-Spain and Spain-UK.
- **Amsterdam** (-211 flights; -21%) mainly due to KLM and easyJet on Netherlands-UK, Netherlands-Spain and Netherlands-Italy.
- **Paris/CDG** (-186 flights; -19%) mainly due to Air France and easyJet on domestic flows, France-Italy and France-UK.

<table>
<thead>
<tr>
<th>Rank evolution over 2 weeks</th>
<th>Top 10 Airports on Wed 12-01-2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airport</td>
<td>Dep/Arr Flights</td>
</tr>
<tr>
<td>IGA Istanbul Airport</td>
<td>826</td>
</tr>
<tr>
<td>Paris/Charles-De-Gaulle</td>
<td>794</td>
</tr>
<tr>
<td>Amsterdam</td>
<td>793</td>
</tr>
<tr>
<td>Madrid/Barajas</td>
<td>752</td>
</tr>
<tr>
<td>Frankfurt</td>
<td>747</td>
</tr>
<tr>
<td>London/Heathrow</td>
<td>661</td>
</tr>
<tr>
<td>Munich</td>
<td>492</td>
</tr>
<tr>
<td>Barcelona</td>
<td>436</td>
</tr>
<tr>
<td>Istanbul/Sabiha Gokcen</td>
<td>420</td>
</tr>
<tr>
<td>Zurich</td>
<td>349</td>
</tr>
</tbody>
</table>

**IGA Istanbul** is the airport with the highest number of dep/arr flights (826) followed by **Paris/CDG** (794), **Amsterdam** (793), **Madrid/Barajas** (752), **Frankfurt** (747) and **London/Heathrow** (661).

Over 2 weeks, IGA Istanbul, Munich, Istanbul Sabiha Gokcen and Zurich increased their rankings while Amsterdam and Barcelona decreased.
Airports (Daily Departure/Arrival flights)

Latest operations

- Highest increases in flights for Paris/Le Bourget.
- Highest decrease for Barcelona (-36%), Amsterdam (-21%) and Paris/CDG (-19%).
- Traffic levels ranging from -75% (London/Gatwick) to -20% (Athens), compared to 2019. (IGA Istanbul Airport was not yet operating during the period of interest in 2019)
**Airports**

**Latest news**

- **Aena** reports 120 million passengers across its network in 2021, 56.4% fewer than in 2019 (domestic -39.2%, international -64.3%) (Madrid 24.1 million, -60.9% & Barcelona 18.9 million, -64.2%).

- **Athens International Airport** reports 12.4 million passengers in 2021, 52.8% up on 2020 but 32.4% down on 2019.

- **Avinor** reports 22.4 million passengers in 2021, 58.7% fewer than in 2019 (domestic -44.3%, international -79.5%).

- **DHMI** report Turkish airports handled 128 million passengers in 2021, 57% up on 2020 but 38% fewer than in 2019 (domestic -31%, international -45%).

- **Glasgow Prestwick Airport**: Scottish Government shelves plans to sells the airport.

- **Groupe ADP** reports 5.2 million passengers at its Paris airports in November, 67.9% of the 2019 figure (CdG 3.4m, 59.2%; Orly 1.8m, 81.2%); domestic was 74.5%, European 67.9%, intercontinental 59.6%.

- **Milan Malpensa Airport** receives Level 4+ ACI airport carbon accreditation.

- **Schiphol** reports 25.5 million passengers in 2021, 22% up on 2020 but 64% down on 2019.

- **Tel Aviv Ben Gurion Airport** reports 6.7 million passengers in 2021 72.9% fewer than in 2019 (domestic -19.6%, international -74.7%).
By 10 January, 31 Member States of EUROCONTROL have reported that more than 50 people (per 100 people) were fully vaccinated (i.e. have received 2 doses of the main vaccines).

15 Member States have fully vaccinated at least 70 people (per 100 people) with Portugal, Malta, Spain and Denmark having fully vaccinated more than 80 people (per 100 people).

All Member States of EUROCONTROL have fully vaccinated at least 20 people (per 100 people).

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

*This designation is without prejudice to positions on status, and is in line with UNSCR 1244/99 and the ICJ opinion on the Kosovo declaration of independence.
Jet fuel prices averaged 182 cts/gal in 2021, oscillating between 163 cts/gal in the first half and 201 cts/gal in the second half of last year.

Jet fuel prices reached 233 cts/gal in the first days of 2022.
To further assist you in your analysis, EUROCONTROL provides the following additional information on a daily basis (daily updates at 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