

15 April 2021



COVID 19 **IMPACT ON** EUROPEAN AVIATION

EUROCONTROL
Comprehensive Assessment



SUPPORTING EUROPEAN AVIATION



NETWORK
MANAGER



Headlines

- 10,945 flights (35% of 2019 levels) on Wednesday 14 April 2021, decreasing over 2 weeks (-8%) but stable over 1 week (Wednesday 7 April 2021).
- Traffic is levelling off after the Easter break period. Flows between North-West Europe and Spain/Italy are recording declines (over 2 weeks).
- Highest decreases for Germany, France, Spain and Turkey. Increase for Italy (domestic).
- Highest decreases for Vueling (-55%), Turkish (-9%), Lufthansa (-17%) and Wizz (-44%). Increases for Alitalia (+32%), Ryanair(+15%) and Eurowings (+27%).
- Domestic traffic vs 2019: Europe (-67%), US (-29%), China (+9%), Middle-East (-45%).

Top 10 Aircraft Operators

on Wed 14 April 2021 (daily flights)

2.  Operated 362 flights
↓ 69%
of same day in 2019
↓ 11% over 2 weeks

3.  Operated 324 flights
↓ 8%
of same day in 2019
↑ 2% over 2 weeks

1.  Operated 684 flights
↓ 46%
of same day in 2019
↓ 9% over 2 weeks

4.  Operated 304 flights
↓ 80%
of same day in 2019
↓ 17% over 2 weeks

5.  Operated 276 flights
↑ 5%
of same day in 2019
↓ 3% over 2 weeks

6.  Operated 264 flights
↓ 64%
of same day in 2019
↑ 1% over 2 weeks

7.  Operated 258 flights
↓ 41%
of same day in 2019
↓ 10% over 2 weeks

8.  Operated 246 flights
↓ 90%
of same day in 2019
↑ 15% over 2 weeks

9.  Operated 182 flights
↓ 76%
of same day in 2019
↓ 16% over 2 weeks

10.  Operated 181 flights
↓ 68%
of same day in 2019
↑ 32% over 2 weeks

Traffic Situation

Daily flights (including overflights)



Traffic over the last 7 days is

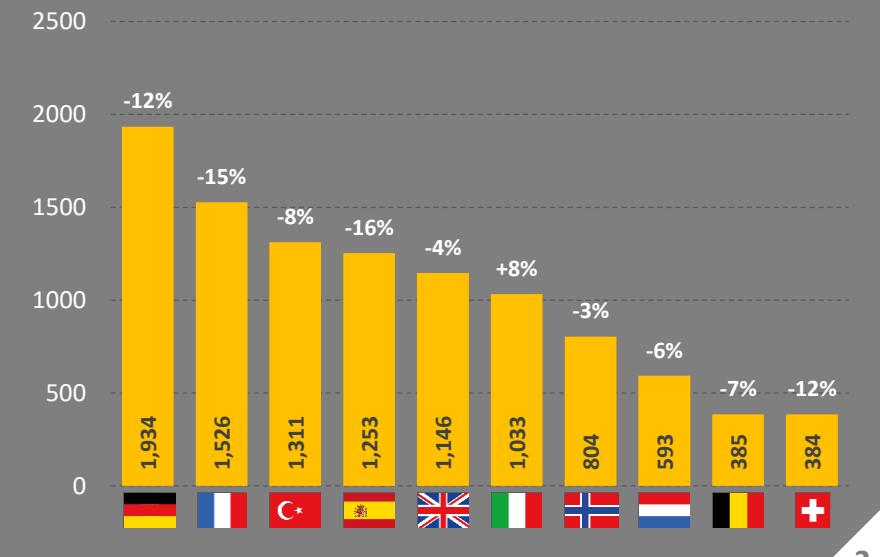
↓ 64%

Compared to
equivalent days
in 2019

[Note: Easter this year (4 April 2021) is almost 3 weeks earlier than in 2019 (21 April 2019)]

Top 10 Busiest States

on Wed 14 April 2021
(Dep/Arr flights and variation over 2 weeks)



Top 10 Busiest Airports

7-day average Dep/Arr flights on 8-14 April, compared to 2019

Top 10 Airports	Average flights per day (week 8-14/4)	Average flights per day (week 8-14/4) vs 2019
IGA Istanbul Airport	641	-43%
Frankfurt	526	-64%
Paris/Charles-De-Gaulle	480	-67%
Amsterdam	472	-67%
Madrid/Barajas	403	-65%
Istanbul/Sabiha Gokcen	395	-35%
London/Heathrow	348	-74%
Palma De Mallorca	242	-62%
Munich	233	-80%
Athens	218	-62%

Traffic Flow

On 14 April, the **intra-European** traffic flow was

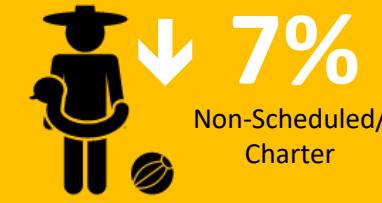
8,143
flights

- 10%
over past 2 weeks

-67%
compared to 2019

Market Segments

On 14 Apr, compared to 2019



Economics

(07 April 2021)

Fuel price

158
Cents/gallon

compared to 156 cents/gallon
on 01 Apr 21

Source: IATA/Platts

Route charges

(March 2021)

Amount billed:

€ 190 million

Jan-Mar 2021 amount billed:

€ 541 million
vs. Jan-Mar 2019

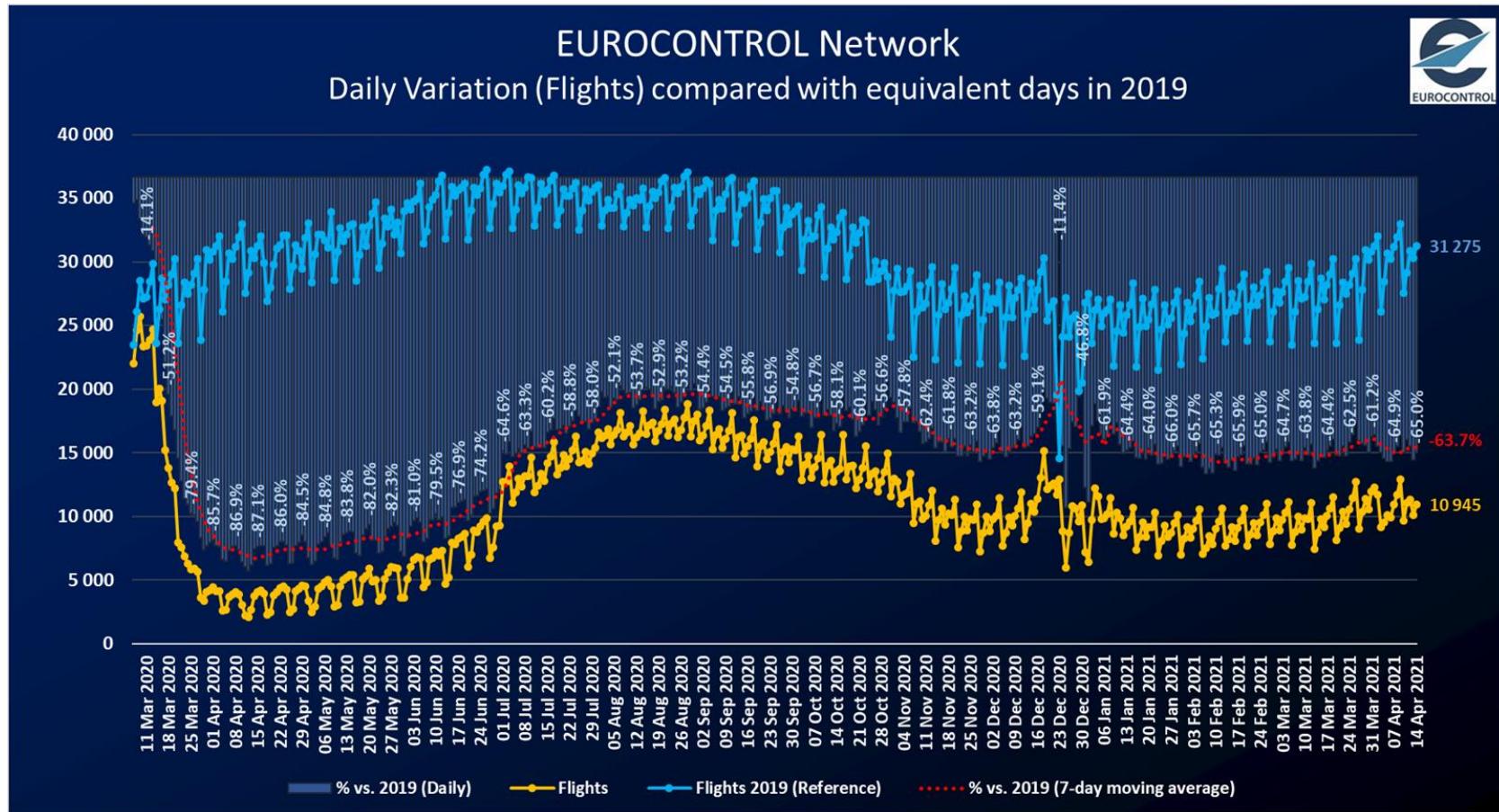
(-67%)

Source: EUROCONTROL

Overall traffic situation at network level



- ✖ **10,945 flights** on Wednesday 14 April.
- ✖ -8% with **-984 flights** over 2 weeks (from Wednesday 31 March).
- ✖ **Stable** with **-12 flights** over 1 week (from Wednesday 7 April).
- ✖ **36%** of 2019 traffic levels.

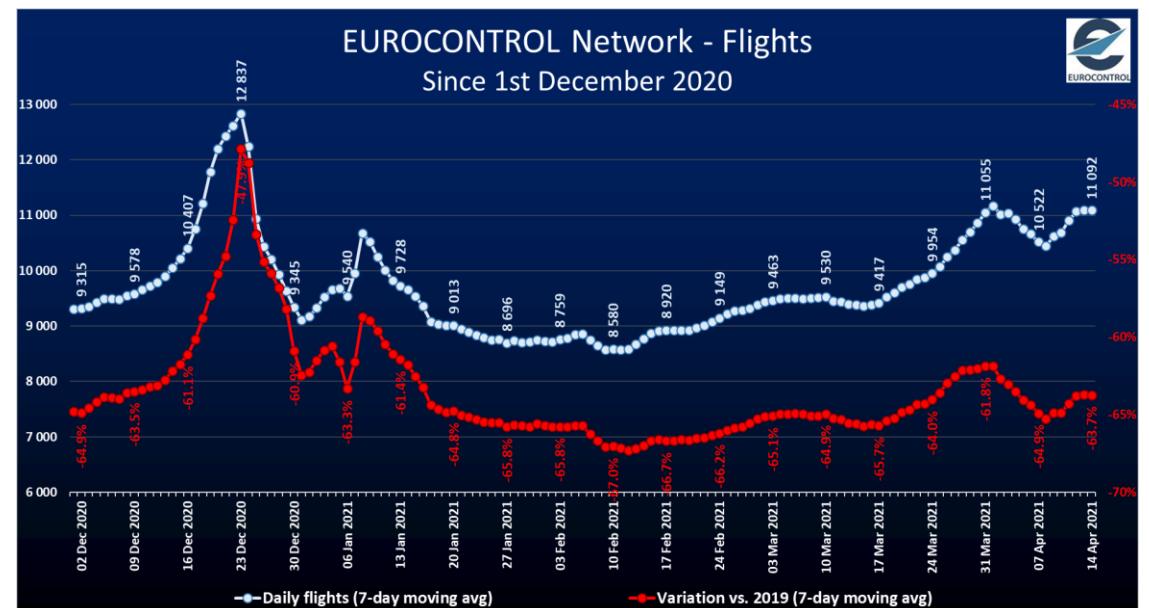
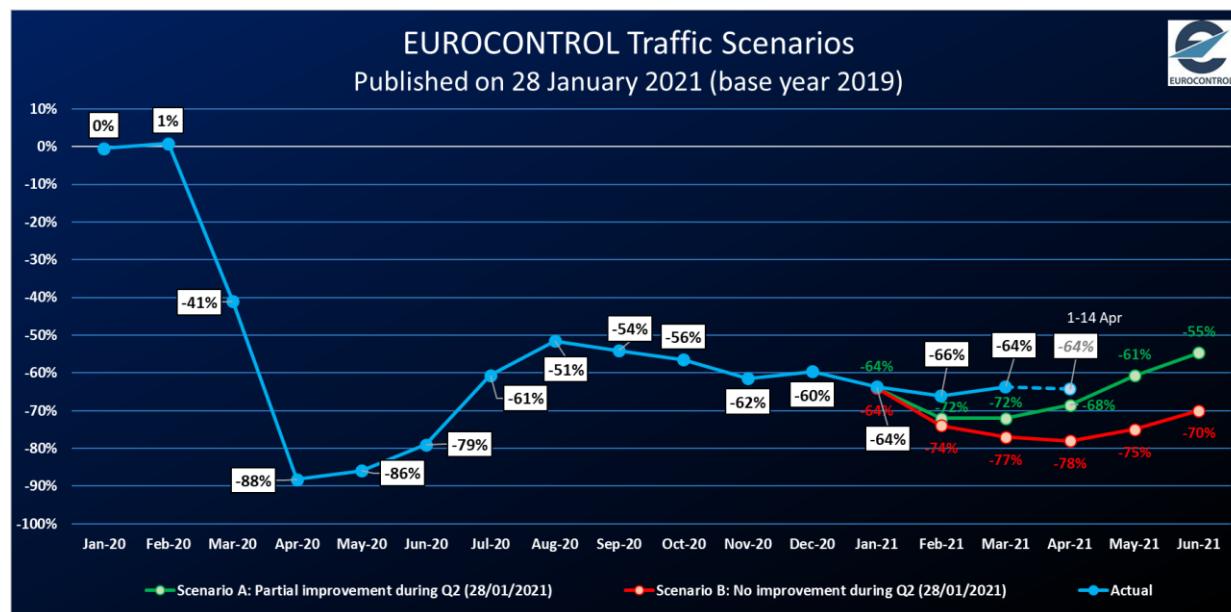


Current situation and scenarios

- Traffic at **-64%** on 1-14 April 2021 vs 1-14 April 2019, slightly above the latest EUROCONTROL traffic scenarios published on 28 January 2021 mainly due to:
 - Very active cargo traffic.
 - Easter holidays started in March compared to April in 2019.

Note that a significant proportion of flight operations for some of the largest airlines are actually non-commercial, i.e. training flights and circular flights to maintain pilot ratings.

- After having reached a maximum at network level at the end of March (around Easter), **the traffic is now stable over the recent days**.
- A large part of the increase vs 2019 is due to the fact that **Easter this year (4 April 2021) is almost 3 weeks earlier than in 2019 (21 April 2019)**.



Aircraft operators (Daily flights)

Top 10

Rank evolution over 2 weeks	Top 10 Aircraft Operators on Wed 14-04-2021					
	Aircraft Operator	Flights	Δ over 2 weeks	% over 2 weeks	% vs 2019	
➔	TURKISH AIRLINES	684	⬇️ -71	-9%	⬇️ -46%	
➔	AIR FRANCE	362	⬇️ -44	-11%	⬇️ -69%	
↗️	WIDEROE	324	↗️ +6	+2%	⬇️ -8%	
⬇️	DEUTSCHE LUFTHANSA	304	⬇️ -62	-17%	⬇️ -80%	
➔	DHL EXPRESS	276	⬇️ -10	-3%	↗️ +5%	
↗️	KLM ROYAL DUTCH AIRL	264	↗️ +2	+1%	⬇️ -64%	
⬇️	PEGASUS HAVA TASI.	258	⬇️ -28	-10%	⬇️ -41%	
↗️	RYANAIR	246	↗️ +32	+15%	⬇️ -90%	
⬇️	SCANDINAVIAN AIRLINES SYSTEM	182	⬇️ -35	-16%	⬇️ -76%	
↗️	ALITALIA	181	↗️ +44	+32%	⬇️ -68%	

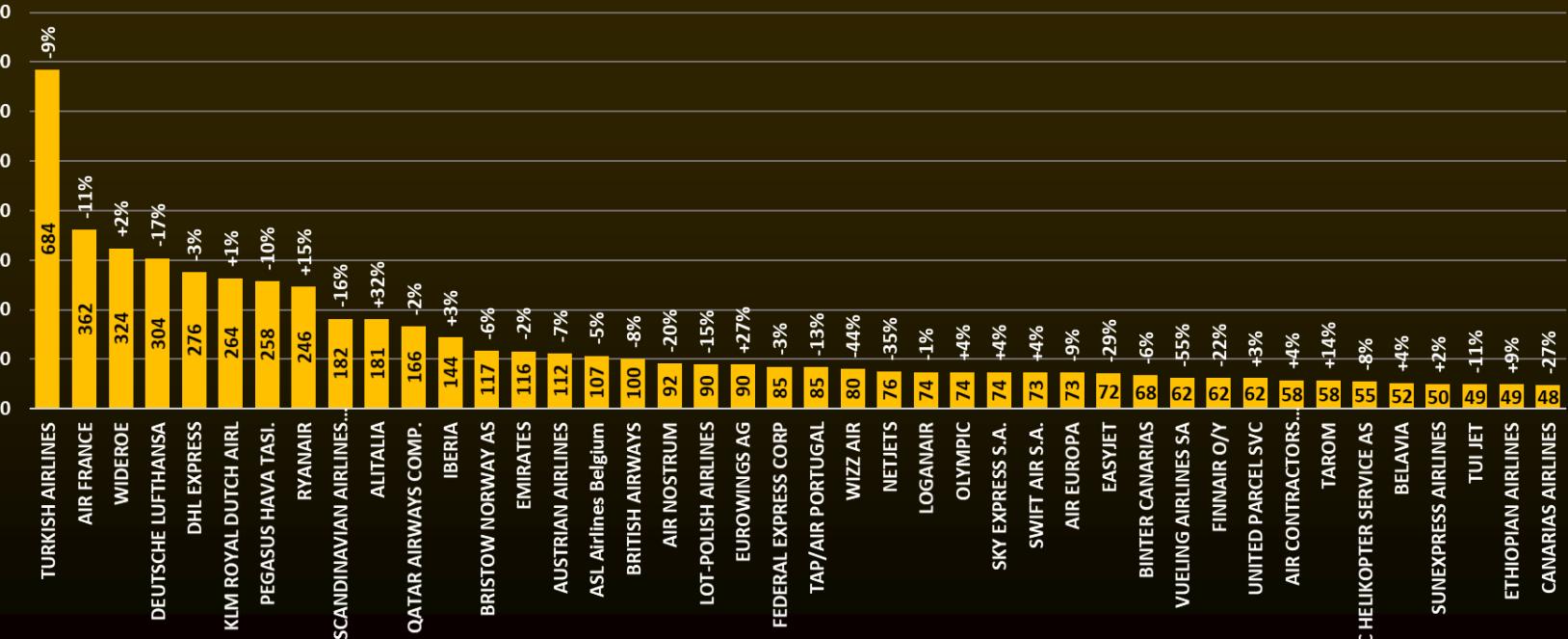
- ✖ Turkish Airlines is the busiest airlines over the last 2 weeks. Despite a 9% decline, some growth on **intercontinental** flows from/to Turkey (Russia, Israel, Malaysia, India, China)
- ✖ Positive change in the ranking over 2 weeks for **Wideroe, KLM, Ryanair and Alitalia**.
- ✖ Highest increase for **Alitalia** (+32%) and **Ryanair** (+15%) driven by domestic increase in Italy. **Ryanair** recorded (more limited) increased on Spain domestic too.
- ✖ **Lufthansa** decline hides a small increase for **Eurowings** on Germany-Austria flow.

Aircraft operators (Daily flights)

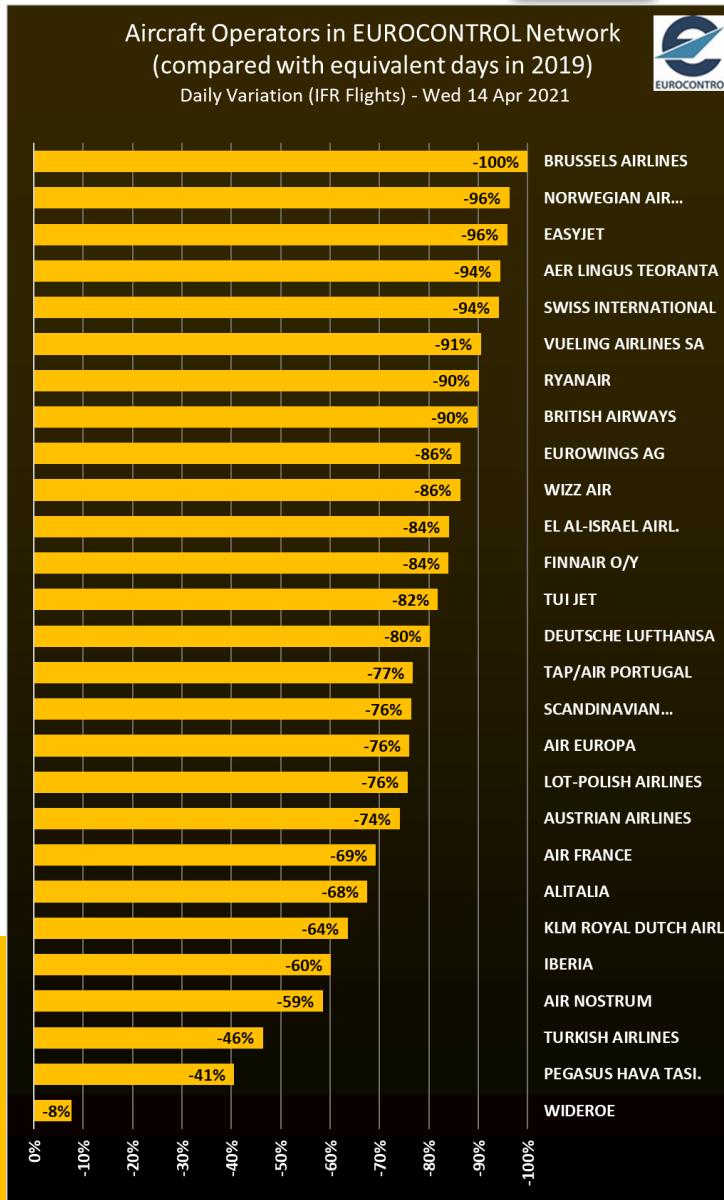
Top 40 – Latest operations

Aircraft operators

Traffic on Wed 14-04-2021 and evolution compared to Wed 31-03-2021



- Highest decreases for Vueling (-55%), Turkish (-9%) , Lufthansa (-17%) and Wizz (-44%).
- Highest increases for Alitalia (+32%), Ryanair(+15%) and Eurowings (+27%).
- Ryanair 8th, British Airways 17th, Wizz Air 23rd and easyJet 30th.
- Traffic levels ranging from -100% (Brussels Airlines) to -8% (Widereo) compared to 2019



Aircraft operators



Latest news

European airlines

- ✖ **Air France** plans to operate 80 seasonal services this summer, including 22 new services, to France, Europe and North Africa.
- ✖ **EI AI** plans to raise at least \$105 million through an offering of shares and/or options.
- ✖ **Finnair** reports March passenger numbers down 82.7% year-on-year (March 2020 was 56% down on 2019).
- ✖ **IAG Cargo** reports that it has delivered 2.5 million vaccines to the Latin America and Caribbean region this year.
- ✖ **Iberia** to trial IATA Travel Pass on Madrid to Montevideo service.
- ✖ **Jet2.com** and **Jet2holidays** extend suspension of operations, having reviewed the latest UK Global Travel Taskforce framework.
- ✖ **Lufthansa** starts converting an A350-900 into a climate research aircraft.
- ✖ **Norwegian** resumes twice weekly routes from Stockholm to Alicante, Malaga and Oslo; March passenger numbers were down 94% on March 2020.

✖ **Ryanair** expects a pretax loss for the year to 31 March 2021 of between €800 and 850 million, a slight improvement on the previous forecast.

Worldwide airlines

- ✖ **Air Canada** enters into financing agreements with the Canadian government for up to CAD5.9 billion.
- ✖ **Air New Zealand** CEO states that trans-Tasman bookings have been very good with Auckland Sydney Brisbane and Melbourne the strongest in terms of volumes.
- ✖ **Cathay Pacific Cargo** cuts capacity by 25% in March due to Hong Kong crew quarantine measures.
- ✖ **Ethiopian Airlines** has flown 5,645 cargo flights using passenger aircraft, with seven of its 16 A350-900s having their seats removed.
- ✖ **Qantas Group CEO** states that the business is generating positive cash flows at operating level; reopens 33 of its 35 domestic lounges; looks to resume international travel in October.
- ✖ **Singapore Airlines** received three new A350-900s.

States (Daily Departure/Arrival flights)

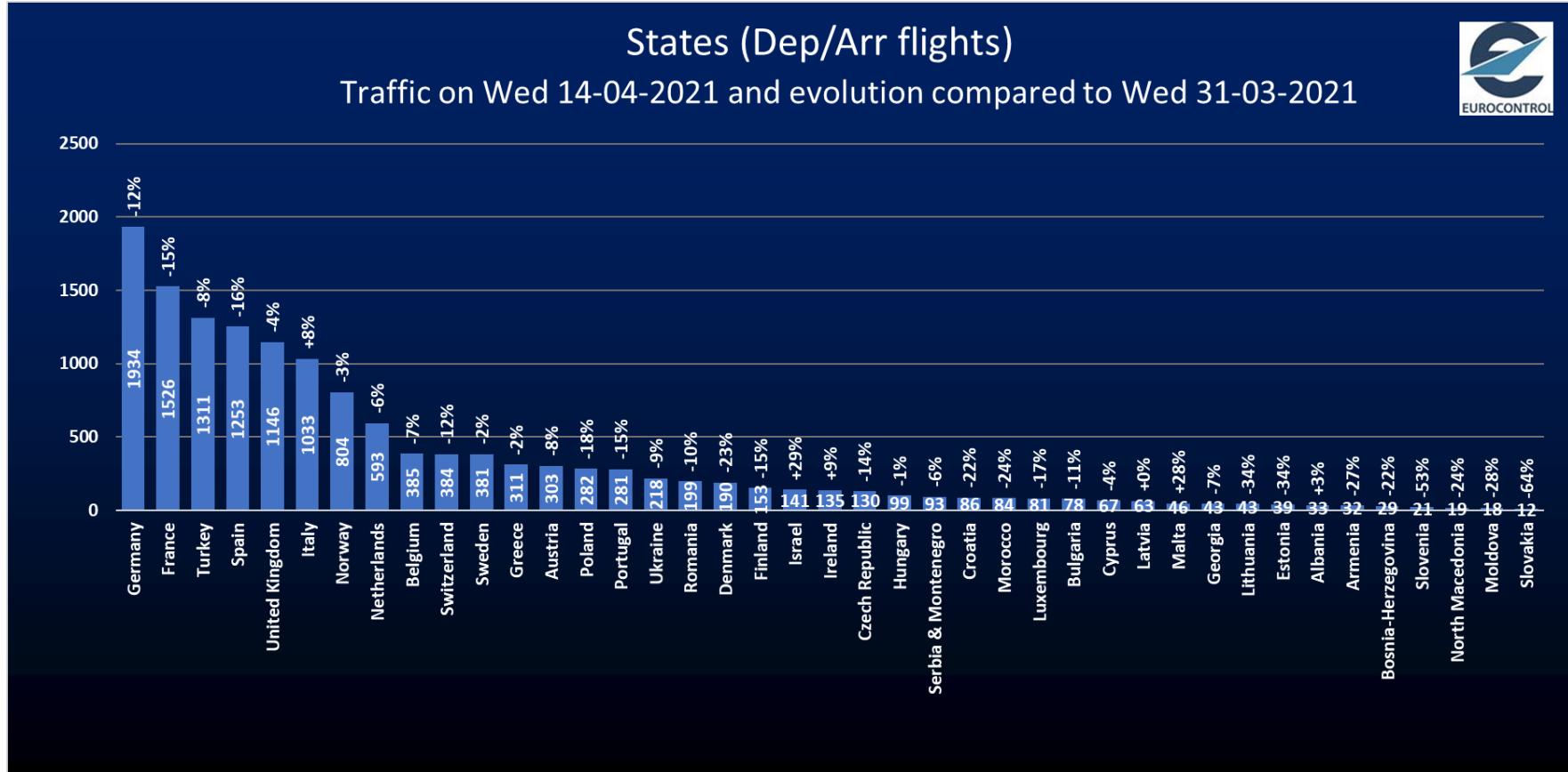
Top 10

Rank evolution over 2 weeks	Top 10 States on Wed 14-04-2021					
	State	Flights (Dep/Arr)	Δ over 2 weeks	% over 2 weeks	% vs 2019	
→	Germany	1934	↘ -263	-12%	↘ -68%	
→	France	1526	↘ -260	-15%	↘ -67%	
↗	Turkey	1311	↘ -111	-8%	↘ -48%	
↘	Spain	1253	↘ -241	-16%	↘ -74%	
→	United Kingdom	1146	↘ -47	-4%	↘ -81%	
→	Italy	1033	↗ +75	+8%	↘ -73%	
→	Norway	804	↘ -21	-3%	↘ -42%	
→	Netherlands	593	↘ -39	-6%	↘ -66%	
↗	Belgium	385	↘ -29	-7%	↘ -63%	
↘	Switzerland	384	↘ -50	-12%	↘ -72%	

- ✖ After relative increases on some destinations in traffic for Easter break (early April), main European States record decreases: Germany (-12%), France (-15%), Spain (-16%) and Switzerland (-12%), due to decreases in domestic and flows between North-West Europe and Spain or Italy.
- ✖ Highest increase for Italy (+8%) mainly driven by domestic flows (traffic from Ryanair and Alitalia).

States (Daily Departure/Arrival flights)

Latest traffic situation



- Highest decreases for Germany (-12% over 2 weeks), France (-15%), Spain (-16%) and Turkey (-8%).
- Highest increases for Italy (+8%) and Israel (+29%).
- Traffic levels ranging from -87% (Slovakia) to -38% (Armenia), compared to 2019.



Associations and Institutions

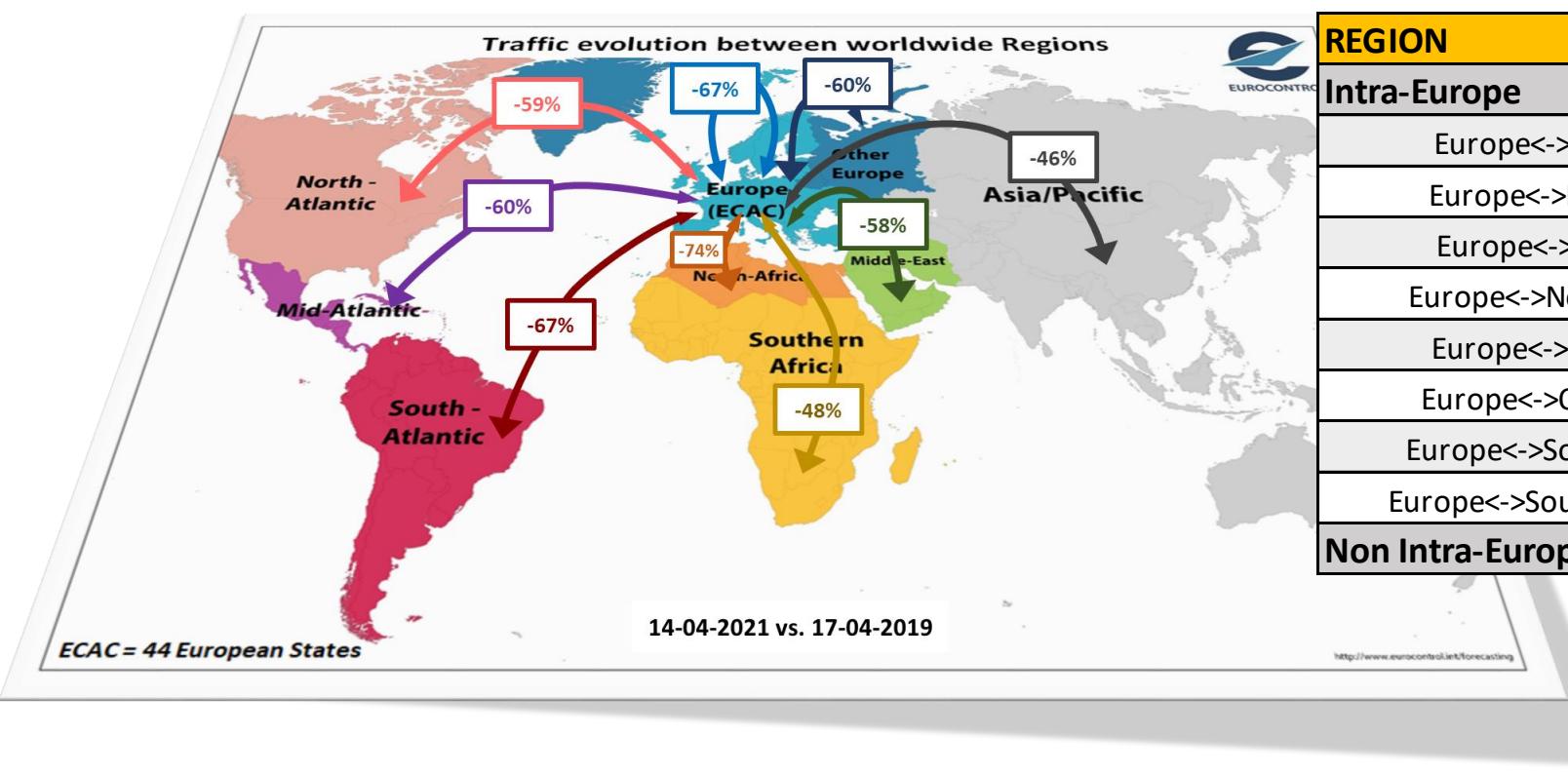


- ✖ **Airbus** delivered 72 aircraft to 354 customers in March and received orders for 28 aircraft; so far this year it has received 39 orders and 100 cancellations.
- ✖ **Boeing** working to solve a potential issue with a backup power control unit on some 737 MAX aircraft; reports 77 commercial aircraft deliveries in Q1, including 63 737s.

- ✖ **Greece** to open its borders on 14 May to those who are fully vaccinated or have a negative test result. Random rapid tests will be carried out.
- ✖ **Malta** reports that 18 airlines plan to resume flights to Malta this summer, with capacity of around 70% pre-COVID levels.
- ✖ **Russia** restricts air services with **Turkey** until 1 June due to the status of the pandemic in Turkey.
- ✖ **US TSA** reports passenger screening numbers of 55%-65% (compared to 2019) during March/April.
- ✖ **UK Global Travel Taskforce** plans to restart international travel (from 17 May at the earliest) using a traffic light system; plans criticized by Airlines UK.

Traffic flows (Daily Departure/Arrival flights)

- The main traffic flow is the intra-Europe flow with 8,143 flights on Wednesday 14 April, which is decreasing (-10%) over 2 weeks.
- Intra-Europe flights are still 67% below 2019 levels while intercontinental flows are running 60% below.



REGION	31-03-2021	14-04-2021	%	vs. 2019
Intra-Europe	9 088	8 143	-10%	-67%
Europe<->Asia/Pacific	418	410	-2%	-46%
Europe<->Mid-Atlantic	67	65	-3%	-60%
Europe<->Middle-East	576	570	-1%	-58%
Europe<->North Atlantic	470	462	-2%	-59%
Europe<->North-Africa	271	248	-8%	-74%
Europe<->Other Europe	345	357	+3%	-67%
Europe<->South-Atlantic	68	57	-16%	-60%
Europe<->Southern Africa	172	167	-3%	-48%
Non Intra-Europe	2 387	2 336	-2%	-60%

Country pairs (Daily Departure/Arrival flights)

Top 10

Rank evolution over 2 weeks	Top 10 Country-Pair on Wed 14-04-2021					
	Country-Pair	Dep/Arr Flights	Δ over 2 week	% over 2 week	% vs 2019	
→	France <-> France	707	⬇️ -158	-18%	⬇️ -47%	
↗️	Norway <-> Norway	665	↗️ +16	+2%	⬇️ -9%	
⬇️	Spain <-> Spain	564	⬇️ -125	-18%	⬇️ -55%	
→	Turkey <-> Turkey	523	⬇️ -110	-17%	⬇️ -42%	
→	Germany <-> Germany	460	⬇️ -42	-8%	⬇️ -56%	
→	Italy <-> Italy	442	↗️ +53	+14%	⬇️ -51%	
→	United Kingdom <-> United Kingdom	360	↗️ +10	+3%	⬇️ -68%	
↗️	Sweden <-> Sweden	196	↗️ +23	+13%	⬇️ -58%	
↗️	Greece <-> Greece	178	↗️ +10	+6%	⬇️ -48%	
⬇️	Germany <-> Spain	143	⬇️ -50	-26%	⬇️ -76%	

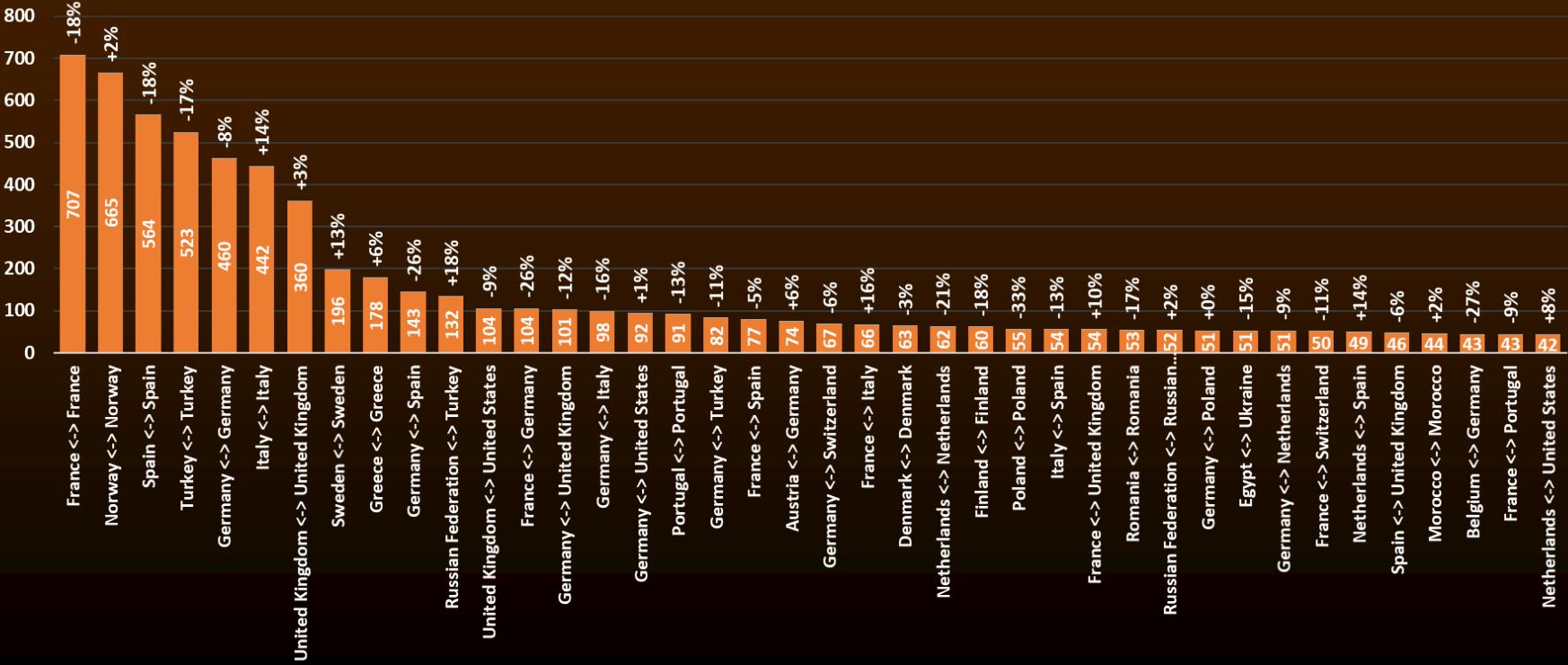
- ❖ 9 of the top 10 flows are domestic.
- ❖ Highest decreases for domestic flows in France & Spain (-18%) as well as in Turkey (-17%) explained by Turkish Airlines and Pegasus decreases.
- ❖ Highest increase in flights for domestic flows in Italy (+14%) thanks to Ryanair, and Alitalia increases.
- ❖ Swedish domestic increased too (+13%) owing to rises from local operators.
- ❖ Decrease on Germany-Spain flow (-26%) after the blip driven by Easter break early April.

Country pairs (Daily Departure/Arrival flights)

Latest traffic situation

Top 40 Country-Pairs (Dep/Arr flights).

Traffic on Wed 14-04-2021 and evolution compared to Wed 31-03-2021



- ❖ The busiest non-domestic flows were:
 - **Germany-Spain** (143 flights, -26% over 2 weeks).
 - **Russia-Turkey** (132, +18%).
 - **UK-US** (104, -9%).
 - **France-Germany** (104, -26%)
 - **Germany-UK** (101, -12%).

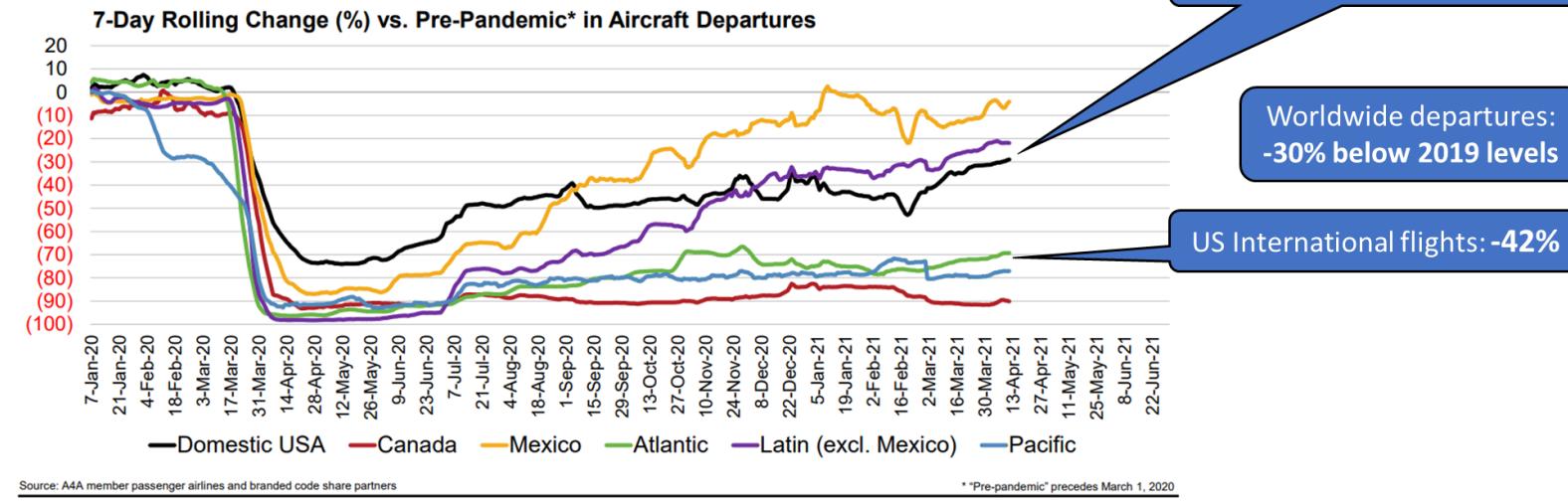
Outside Europe

USA

- Bookings are gradually improving on rising vaccination rates and easing travel restrictions.
- US domestic recorded a decline of 29% (vs 2019) and international traffic recorded a decline of 42% (vs 2019) on 13 April.
- On 13 April, US airline passenger volumes were 29% below 2019 levels with domestic down 36% and international down 56%.
- The domestic US load factor has improved recently, averaging at 75% on 13 April vs 86% in same week of 2019.
- In March 2021, U.S. International air travel* fell 76% below 2019 levels

* Gateway-to-gateway passengers on U.S. and foreign scheduled and charter airlines and general aviation

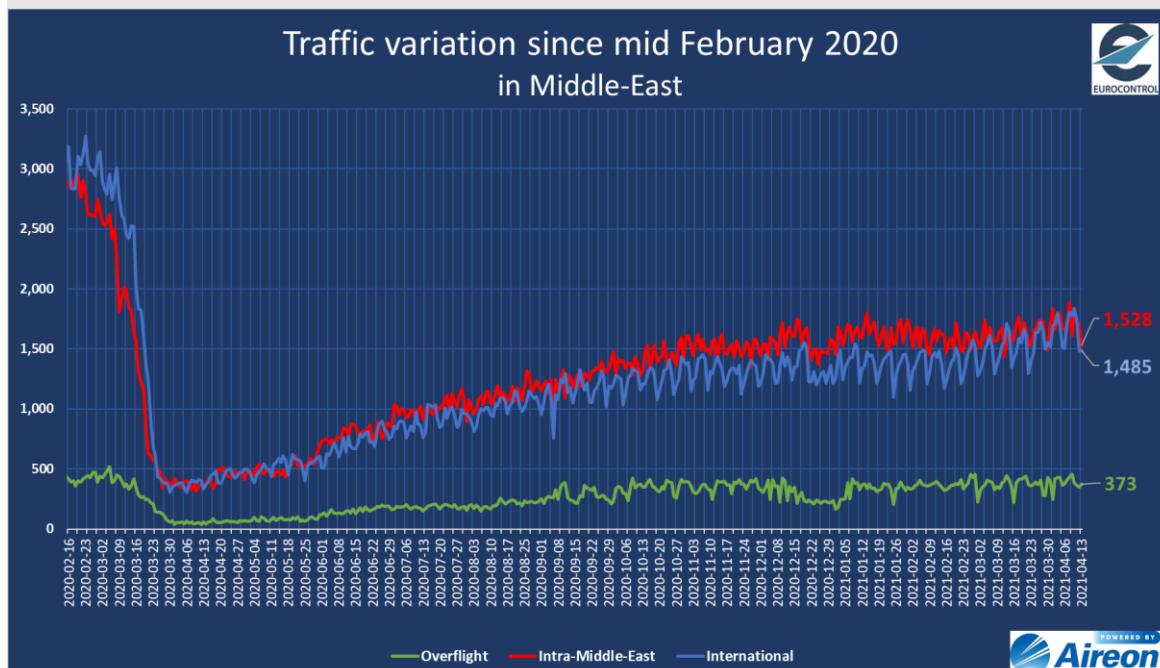
In Most Recent Week, U.S. Passenger Airline Departures Were 30% Below Pre-Pandemic Levels
Domestic Flights Operated Down 29%, International Flights Operated Down 42%



Outside Europe

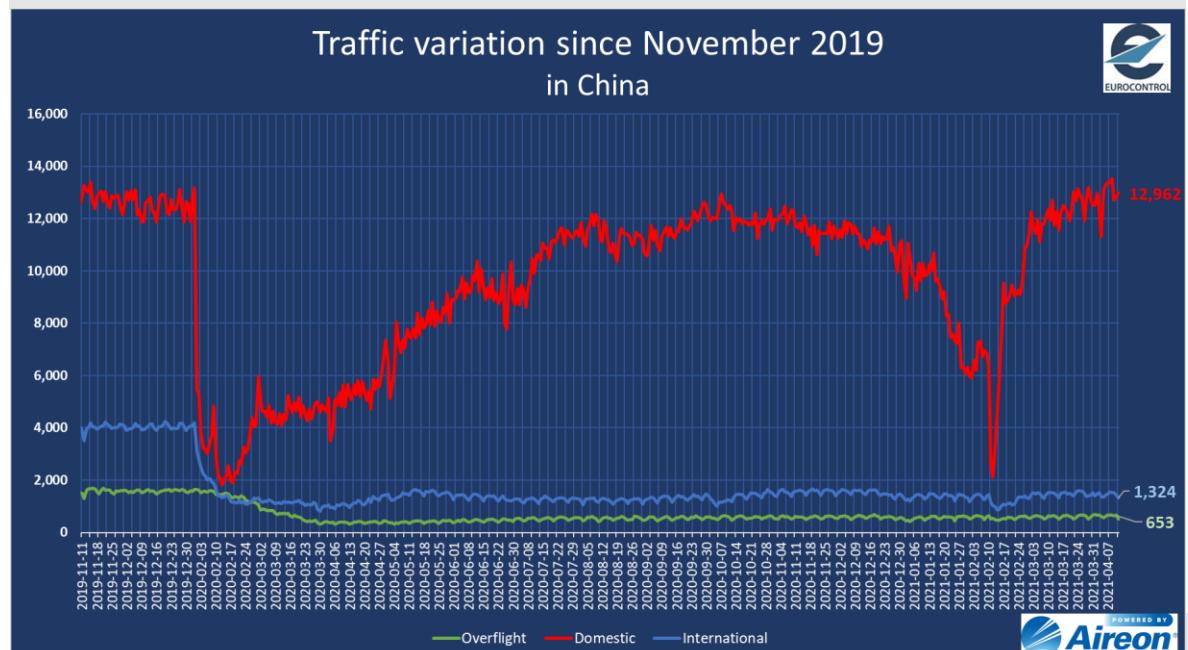
Middle East

- Intra-Middle-East traffic recorded around 1,528 daily flights on 13 April (-45% compared to Feb 2020).
- On 13 April, international traffic from and to Middle-East recorded 1,485 flights (-51% compared to Feb 2020).
- Overflights have remained stable around 373 flights (-13% compared to Feb 2019) over the recent weeks.



China

- On 12 April, domestic traffic recorded just below 13,000 flights (+9% compared to January 2020 levels).
- International flights and overflights are still suppressed, they were stable on previous weeks with 1,324 and 653 flights respectively (-67% each vs 1 Jan 2020).
- The CAAC reported a passenger load factor of 64% in January 2021 vs 76.7% in January 2020 vs 81.8% in January 2019.



Airports (Daily Departure/Arrival flights)

Top 10 and latest news

Rank evolution over 2 weeks	Top 10 Airports on Wed 14-04-2021					
	Airport	Dep/Arr Flights	Δ over 2 weeks	% over 2 weeks	% vs 2019	
→	IGA Istanbul Airport	604	↘ -47	-7%	↘ -47%	
↗	Paris/Charles-De-Gaulle	478	↘ -41	-8%	↘ -67%	
↘	Frankfurt	474	↘ -53	-10%	↘ -68%	
→	Amsterdam	451	↘ -14	-3%	↘ -69%	
→	Madrid/Barajas	414	↗ +1	+0%	↘ -65%	
→	Istanbul/Sabiha Gokcen	345	↘ -60	-15%	↘ -42%	
→	London/Heathrow	330	↗ +7	+2%	↘ -76%	
↗	Milan/Malpensa	231	↗ +9	+4%	↘ -62%	
→	Leipzig/Halle	227	↘ -14	-6%	↘ -11%	
↗	Cologne/Bonn	223	↘ -4	-2%	↘ -46%	

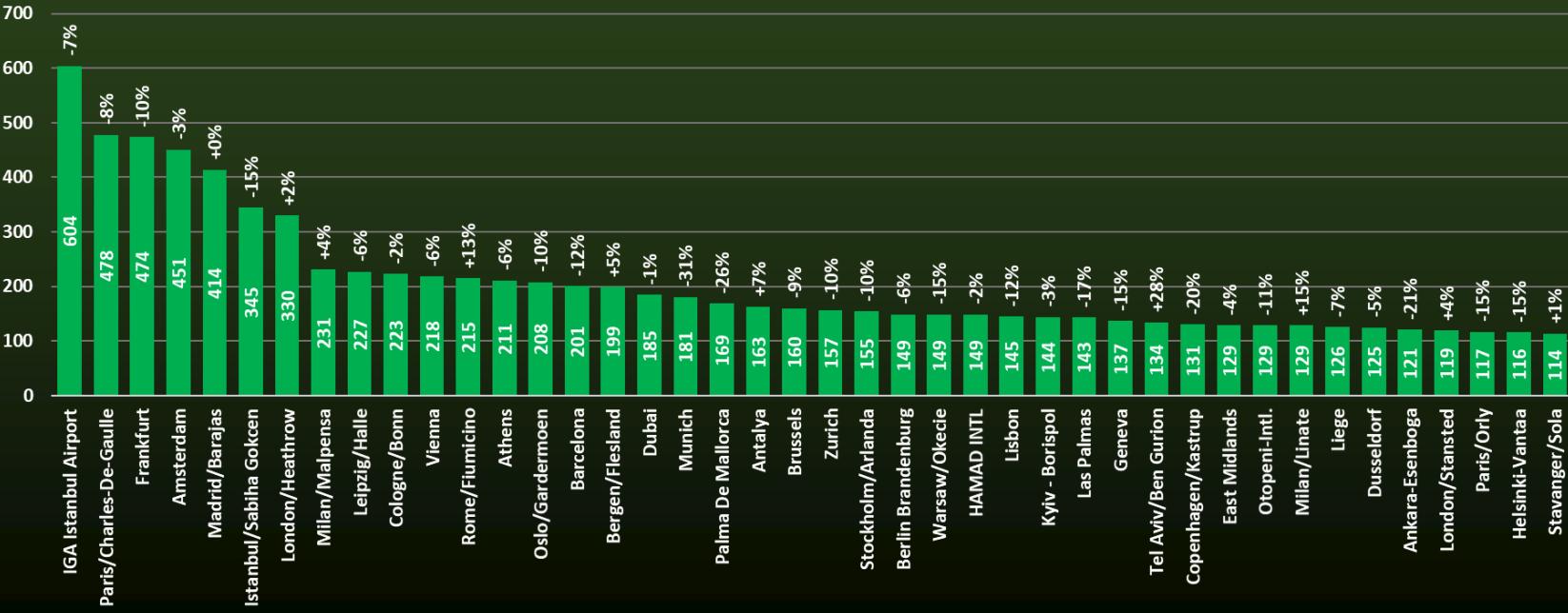
- ✖ 7 of top 10 airports posted decreases over 2 weeks, back to pre-Easter break traffic levels.
- ✖ Largest decrease for Istanbul/Sabiha Gokcen (-15%) due to decrease of domestic traffic in Turkey. The same reason explains decrease at Istanbul IGA (-7%).
- ✖ Decreases for Frankfurt (-10%) mainly due to Lufthansa, TUI and Condor and on flows from/to Spain, France and Italy.
- ✖ Highest increase for Milan (+4%) mainly due to Alitalia and domestic flows.

Airports (Daily Departure/Arrival flights)

Latest operations

Top 40 Airports (Dep/Arr flights)

Traffic on Wed 14-04-2021 and evolution compared to Wed 31-03-2021



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

Daily Variation (IFR Dep/Arr Flights) - Wed 14 Apr 2021



- ❖ Largest decreases for **Munich, Sabiha, Palma, Frankfurt, IGA Istanbul and CDG**.
- ❖ Largest increase for **Tel Aviv** over 2 weeks (+28%) (El Al, domestic flows), **Rome** (+13%) and **Milan** (+4%) mainly from Alitalia and Ryanair.
- ❖ Traffic levels ranging from -97% (Gatwick) to -47% (Istanbul IGA) compared to 2019.

Latest news

- ✖ **Aena** reports March passenger numbers for its airport network down 61% year-on-year to 3.2 million; March 2020 was 59% down on 2019.
- ✖ **Ankara Airport** March 2021 passenger numbers down 23.7% on March 2020 (domestic - 21.6%, international -38.8%); March 2020 was 53.6% (52.6%/59.6%) down on 2019.
- ✖ **Avinor** reports March passenger numbers for its airport network down 54% year-on-year (domestic -36%, international -90%); March 2020 was 65% (55%/58%) down on 2019.
- ✖ **London Luton Airport** to host an outdoor cinema in their long term car park.
- ✖ **Rome Fiumicino and Ciampino airports** become the first in Europe to achieve level 4+ ACI Carbon Accreditation.
- ✖ **Schiphol Group** reports that **Eindhoven, Rotterdam and Groningen airports** plan to test the feasibility, potential and handling of electric flights.
- ✖ **Swedavia** reports March passenger numbers for its airport network down 74% year-on-year (domestic -66%, international -78%); March 2020 was 60% (59%/60%) down on 2019.

En-Route Air Navigation charges



En-route air navigation charges At EUROCONTROL Network level

Amounts billed + Monthly and Year-to-Date variations (2021 vs 2019)



193 M€

-65%
-65%

158 M€

-67%
-69%

190 M€

-67%
-68%

January

February

March

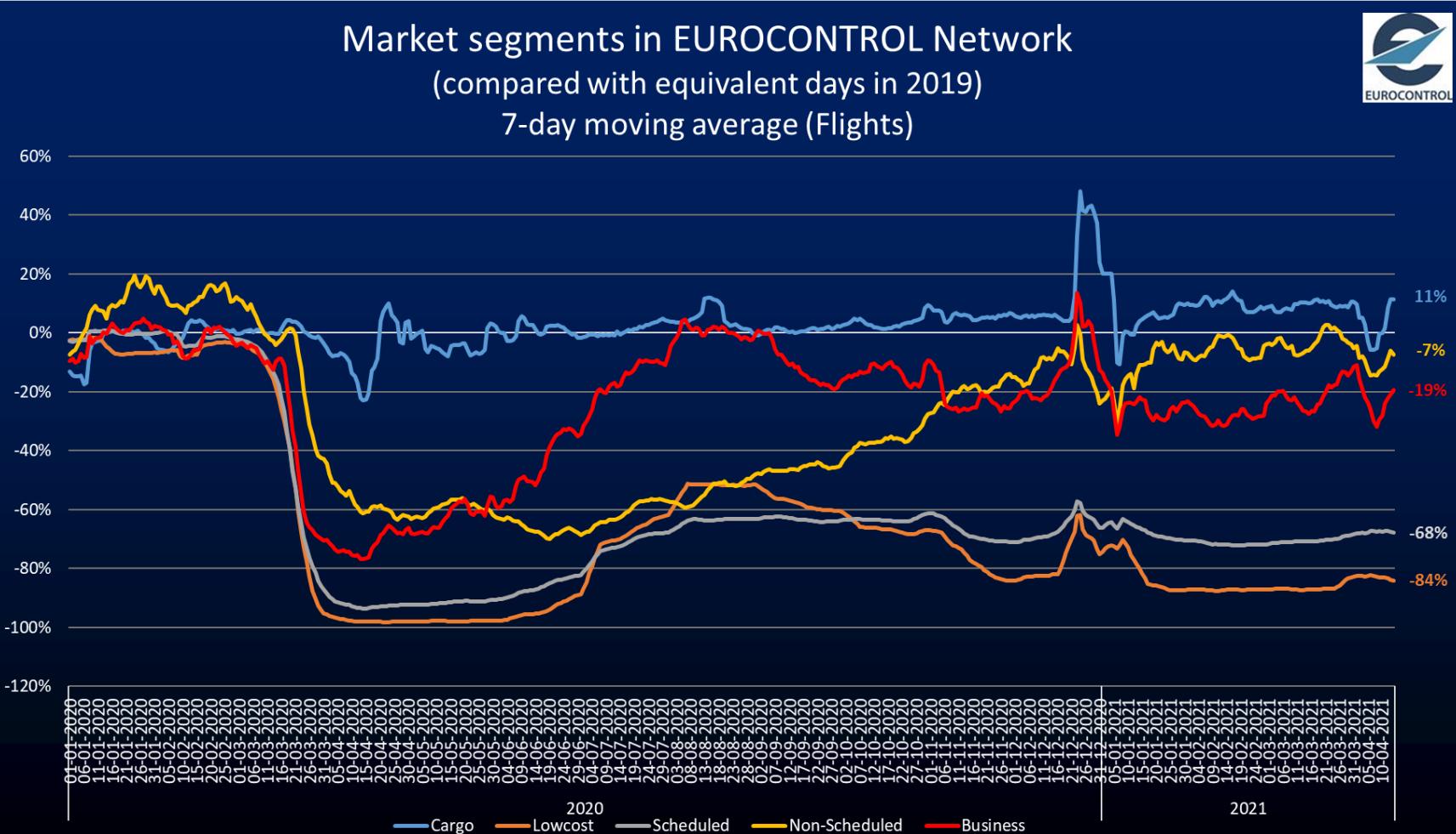
En-route charges billed in 2021

Monthly variation vs. 2019

Cumulative variation vs 2019

- **EUROCONTROL** has just billed **190M€** of en-route charges for March flights.
- This is **-68%** below the amount billed for the March 2019 flights.
- On a year-to-date basis, we are at **-67% vs 2019**

Market Segments

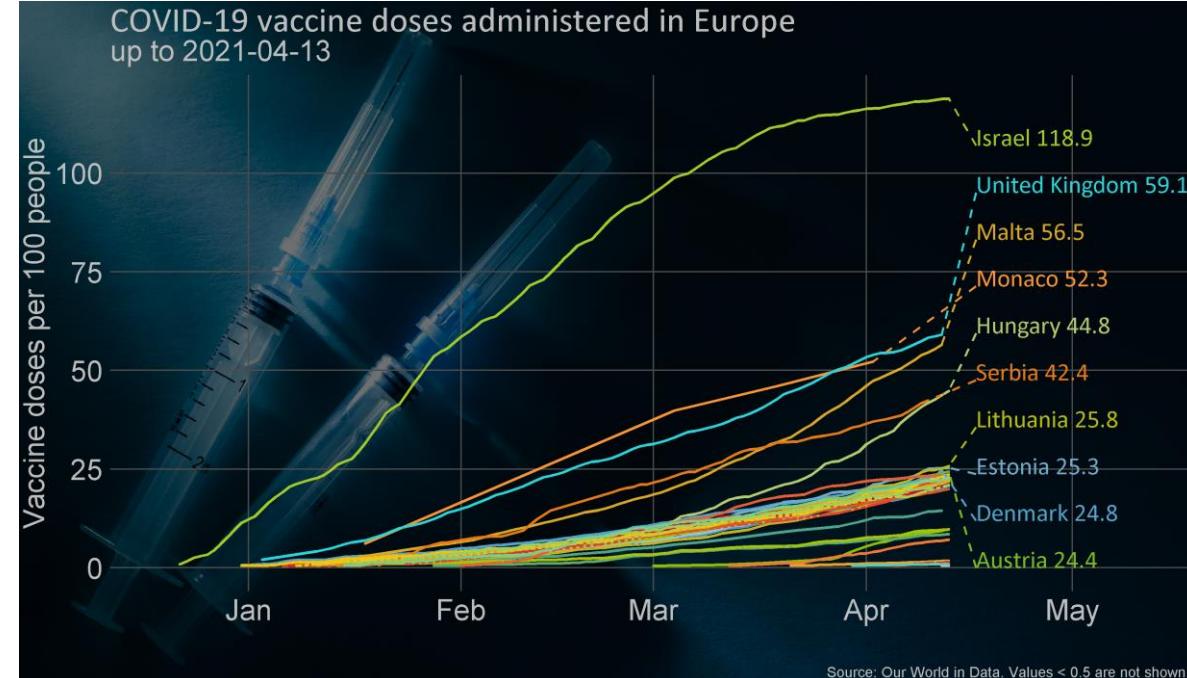


The evolution of the segments is now almost getting back to pre-Easter trends. On 14 April 2021, compared to 2019:

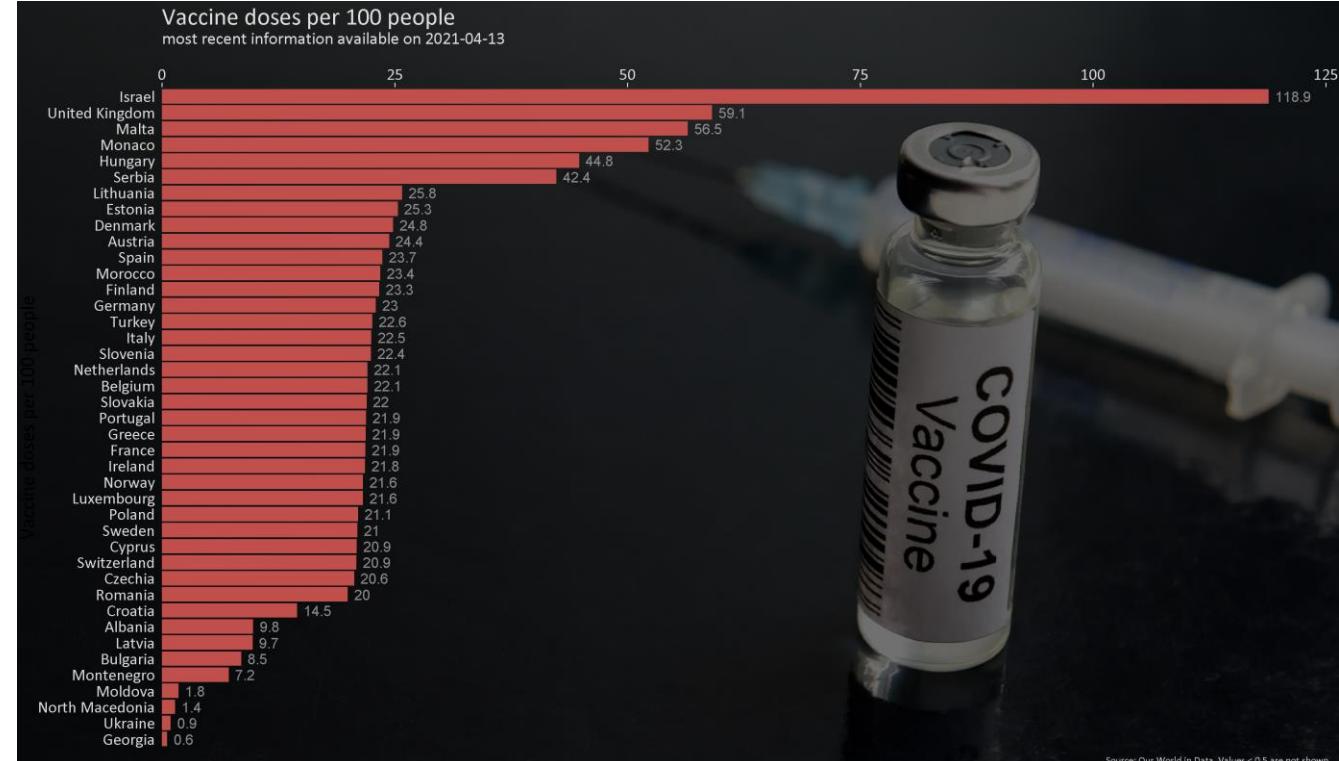
- * **All-cargo** is the only segment increasing with **+11%**.
- * **Charter** decreased to **-7%**.
- * **Business Aviation** decreased to **-19%**.
- * **Traditional** remained very stable, declining by **-67%**.
- * After a minor blip over Easter, **Low-Cost** remains the most affected segment decreasing by **-84%** vs 2019.

Vaccination updates

COVID-19 vaccine doses administered in Europe
up to 2021-04-13



Vaccine doses per 100 people
most recent information available on 2021-04-13

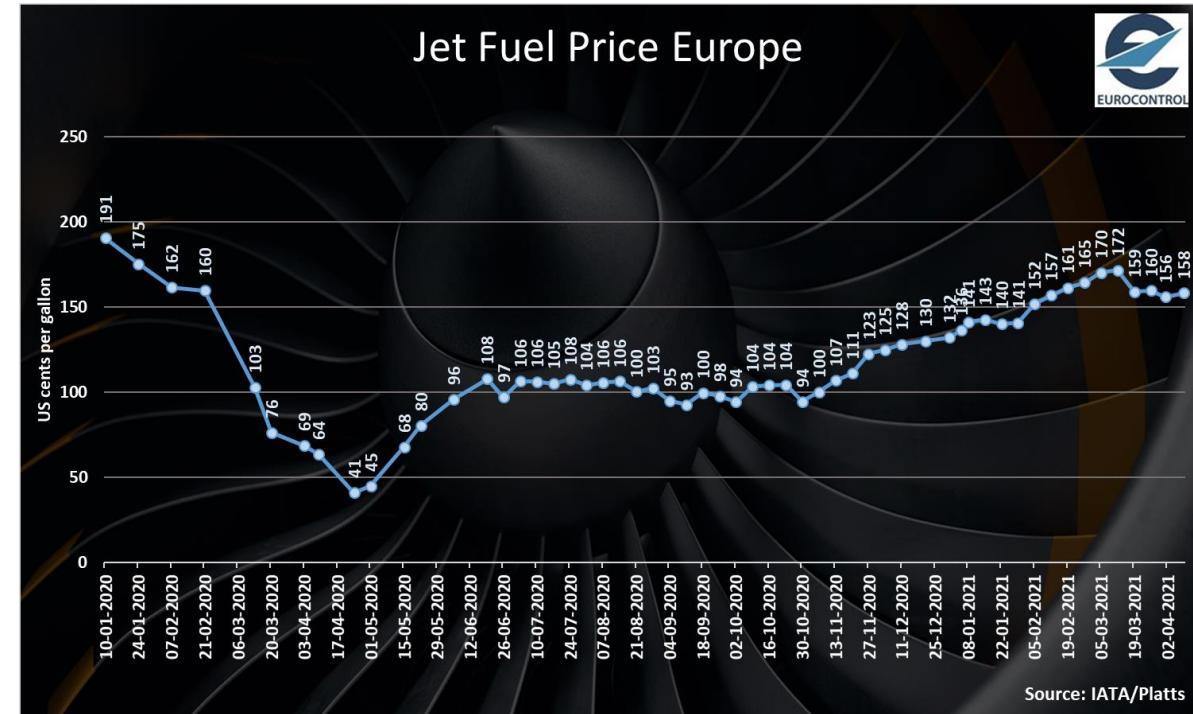
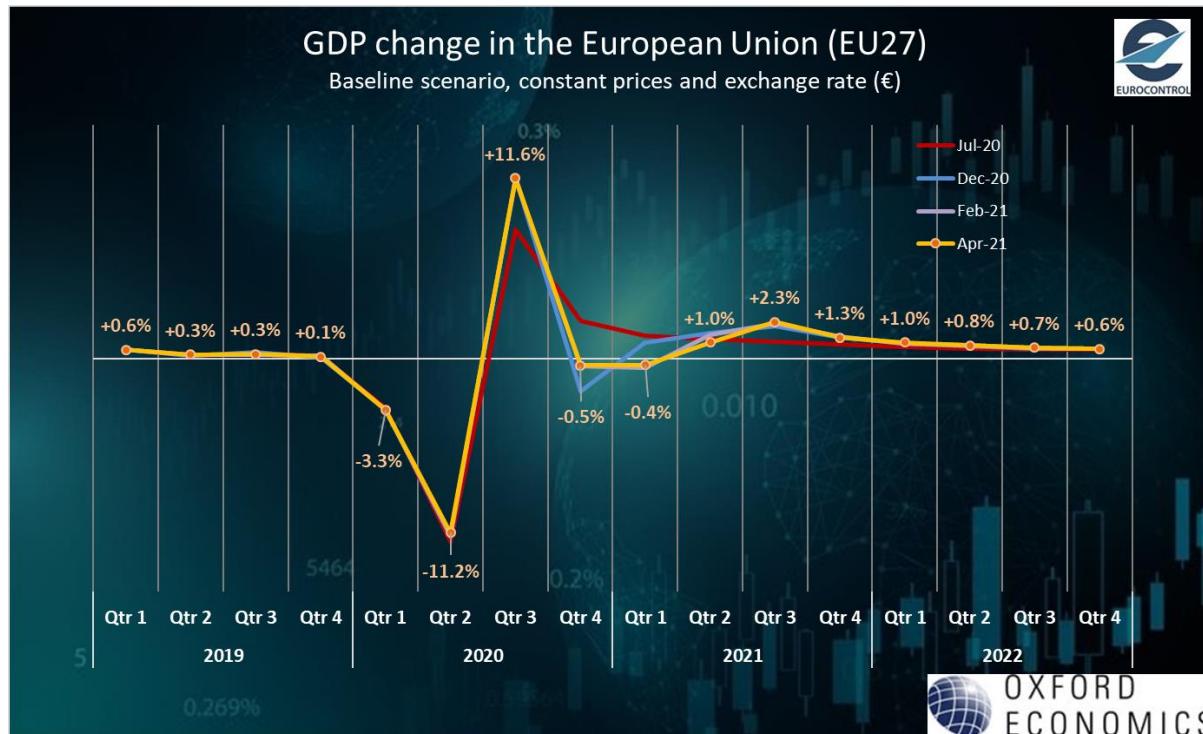


- Inoculations against COVID-19 have started at the end of 2020 as shown with the daily number of COVID-19 vaccination doses administered per 100 people on the left hand-side graph.
- On the right hand-side one: Estonia and Lithuania joined the 6 States where it is reported that more than 25 doses per hundred people have been administered by 13 April 2021.

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

Economics

- ❖ **GDP (Oxford Economics):** slight downward revision for Q2 2021 (from +1.5% in February 2021 to +1% in April 2021 in the base scenario). Strongest rate of this year is expected in Q3.
- ❖ At an annual level, 2021 is likely to record 4% growth in the base scenario, then 4.7% in 2022.



- ❖ **Jet fuel prices** remained stable since the beginning of March around 160 cts/gal and recorded **158 cts/gal** on 7 April 2021.
- ❖ Current prices are comparable to year-ago levels, just before the COVID-19 outbreak start.

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



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