1 April 2021

EUROCONTROL

COVID 19 IMPACT ON EUROPEAN AVIATION

EUROCONTROL Comprehensive Assessment

Headlines

- 11,931 flights (39% of 2019 levels) on Wednesday 31 March 2021.
- March traffic increasing within Network over 2 weeks (+19%, +1,882 flights).
- Acceleration of the increase over the last 2 weeks due to Easter holidays, increase of domestic flows and flows to southern Europe (Spain +52%, Germany +32%).
- 2-digit increase over 2 weeks for most top Aircraft Operators. +215% for Ryanair, +61% for Lufthansa and +45% for SAS.
- Domestic traffic vs 2019: Europe (-63%), US (-31%), China (+11%), Mid-East (-47%).

Traffic Situation

Daily flights (including overflights)

EUROCONTROL

Traffic over the last 7 days is

↓62%

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 Aircraft Operators

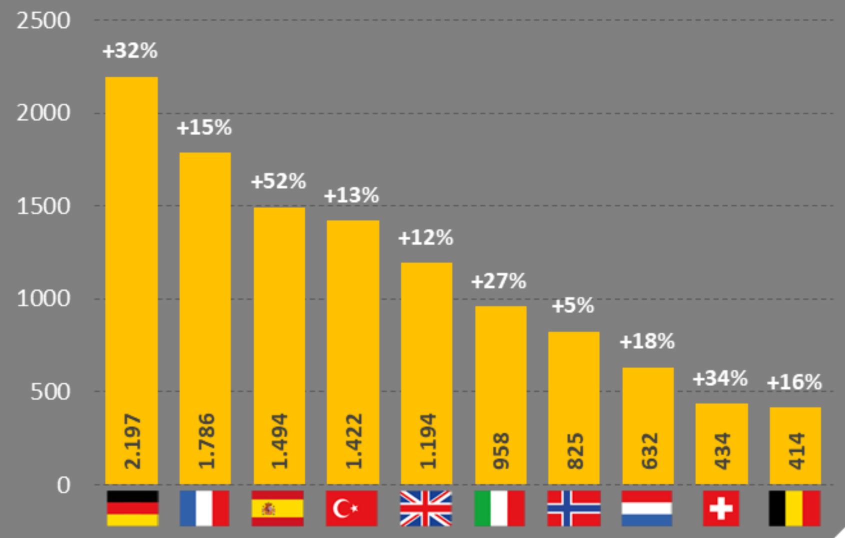
on Wed 31 March 2021 (daily flights)

Rank	Operator	Flights operated	vs same day in 2019	over 2 weeks
1.	Turkish Airlines	Operated 755 flights	↓44% of same day in 2019	↑16% over 2 weeks
2.	Air France	Operated 406 flights	↓65% of same day in 2019	↑10% over 2 weeks
3.	Lufthansa	Operated 366 flights	↓77% of same day in 2019	↑61% over 2 weeks
4.	Wideroe	Operated 318 flights	↓20% of same day in 2019	↓2% over 2 weeks
5.	DHL Express	Operated 286 flights	↑10% of same day in 2019	↑1% over 2 weeks
6.	Pegasus	Operated 286 flights	↓33% of same day in 2019	↑14% over 2 weeks
7.	KLM	Operated 262 flights	↓64% of same day in 2019	↑13% over 2 weeks
8.	SAS	Operated 217 flights	↓79% of same day in 2019	↑45% over 2 weeks
9.	Ryanair	Operated 214 flights	↓91% of same day in 2019	↑215% over 2 weeks
10.	Qatar Airways	Operated 170 flights	↓30% of same day in 2019	↓7% over 2 weeks

Top 10 Busiest States

on Wed 31 March 2021

(Dep/Arr flights and variation over 2 weeks)



Top 10 Busiest Airports

7-day average Dep/Arr flights on 25-31 March, compared to 2019

Top 10 Airports	Average flights per day (week 25-31/3)	Average flights per day (week 25-31/3) vs 2019
IGA Istanbul Airport	616	Not yet in operation in early 2019
Frankfurt	507	-65%
Paris/Charles-De-Gaulle	489	-64%
Amsterdam	445	-68%
Istanbul/Sabiha Gokcen	415	-31%
Madrid/Barajas	411	-64%
London/Heathrow	336	-75%
Munich	242	-79%
Palma De Mallorca	237	-47%
Barcelona	226	-75%

Traffic Flow

On 31 March, the intra-European traffic flow was

9,088 flights

+25% over **past 2 weeks**

-63% compared to **2019**

Market Segments

On 31 Mar, compared to 2019

↓83% Low cost

↓68% Traditional

↓11% Business Aviation

↓ 5% Non-Scheduled/ Charter

↑11% All Cargo

Economics

(26 March 2021)

Fuel price

↑160 Cents/gallon

compared to **159 cents/gallon on 19 Mar 21**

Source: IATA/Platts

Passengers

(11 March 2021)

0.92 million pax

-4.8 million

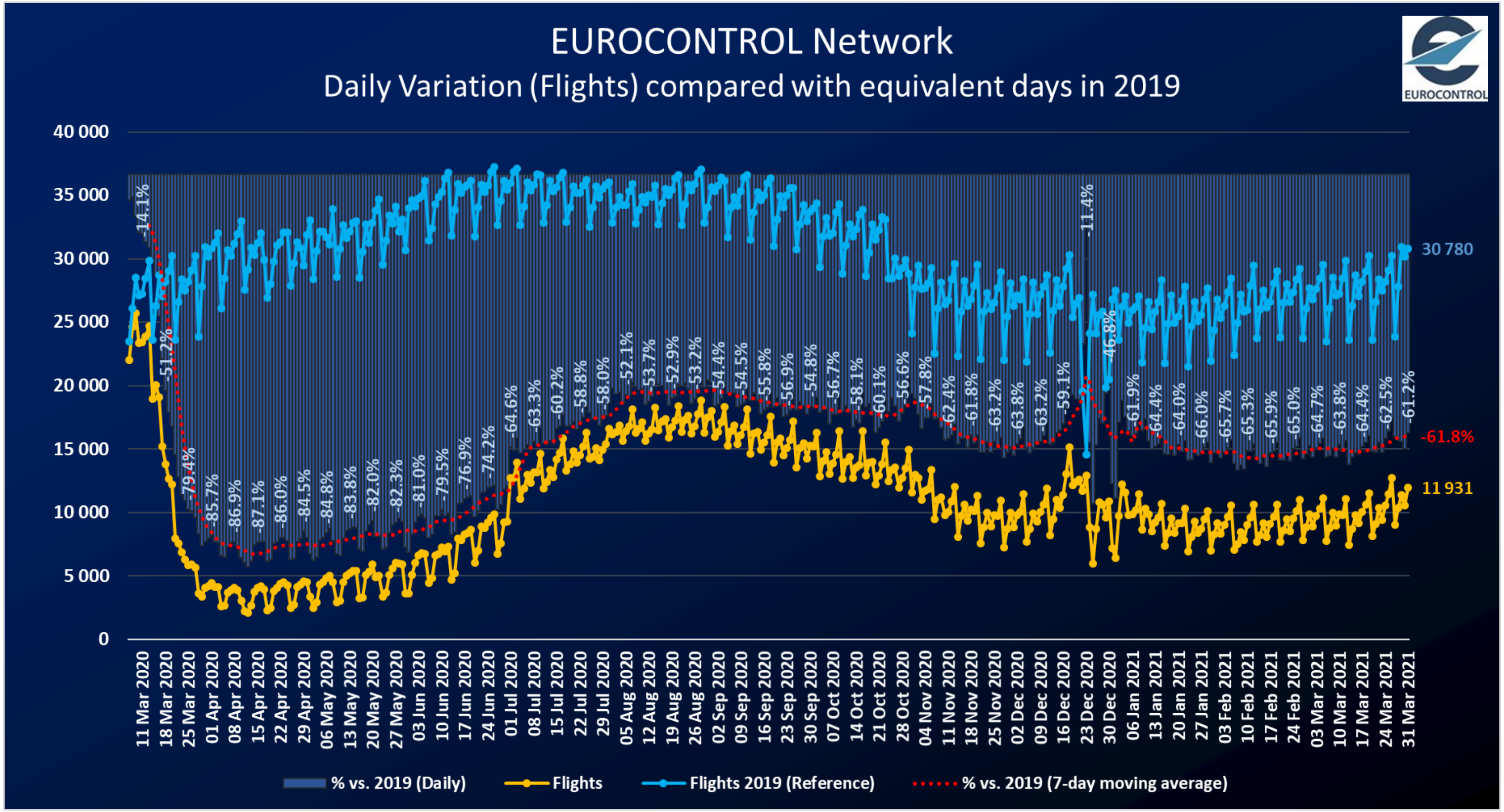
Vs. 2019

(-84%)

Source: ACI

Overall traffic situation at network level

- **11,931 flights** on Wednesday 31 March.
- **+19%** with **+1,882 flights** over 2 weeks (from Wednesday 17 March).
- **+13%** with **+1,364 flights** over 1 week (from Wednesday 24 March).
- **39%** of 2019 traffic levels.

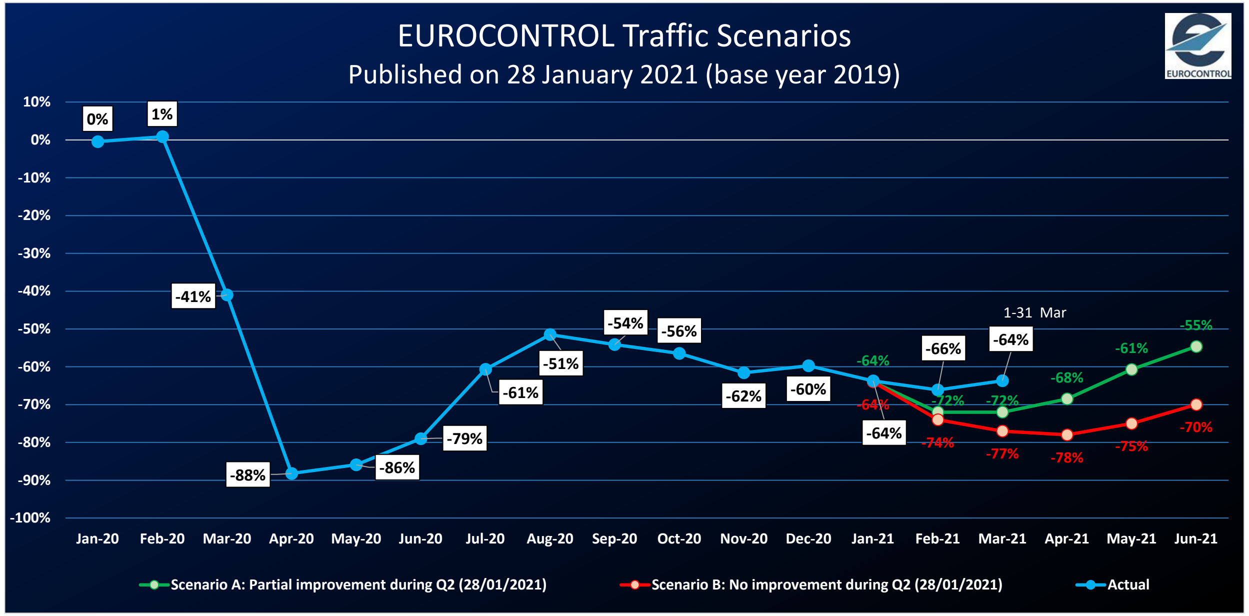


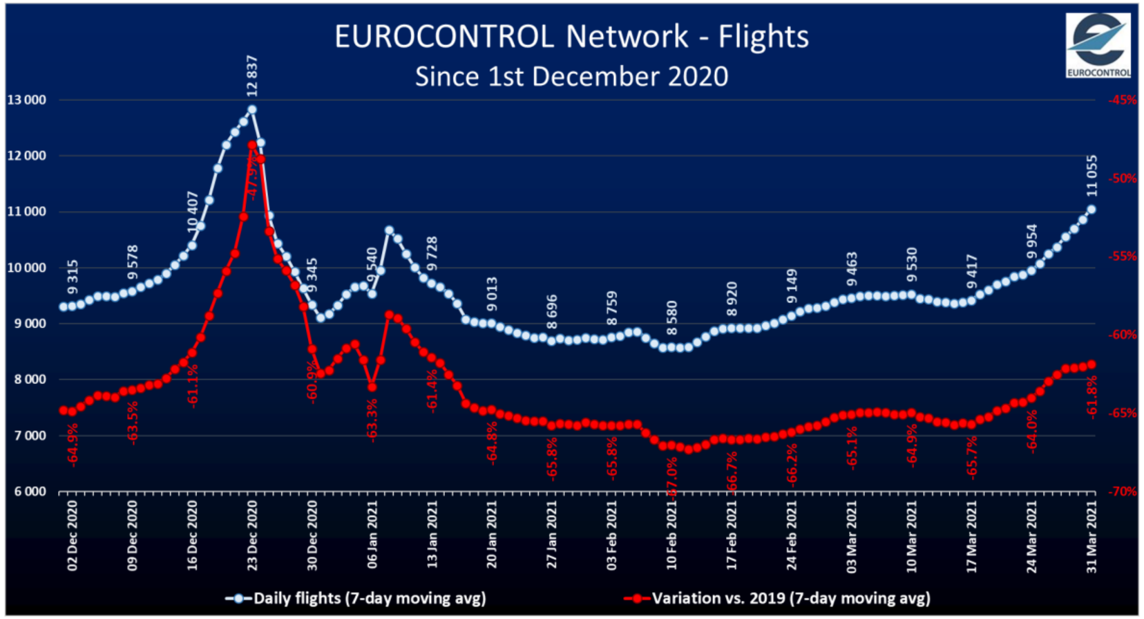
Current situation and scenarios

- **Traffic at -64% for March 2021 vs March 2020**, above the latest EUROCONTROL traffic scenarios published on 28 January 2021 mainly due to:
  - Very active cargo traffic.
  - Higher number of operations for top airlines than anticipated.
  - 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 minimum at network level in the 2nd week of February, the traffic has shown a **positive steady trend since mid February which has accelerated over the last week**.
- 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)

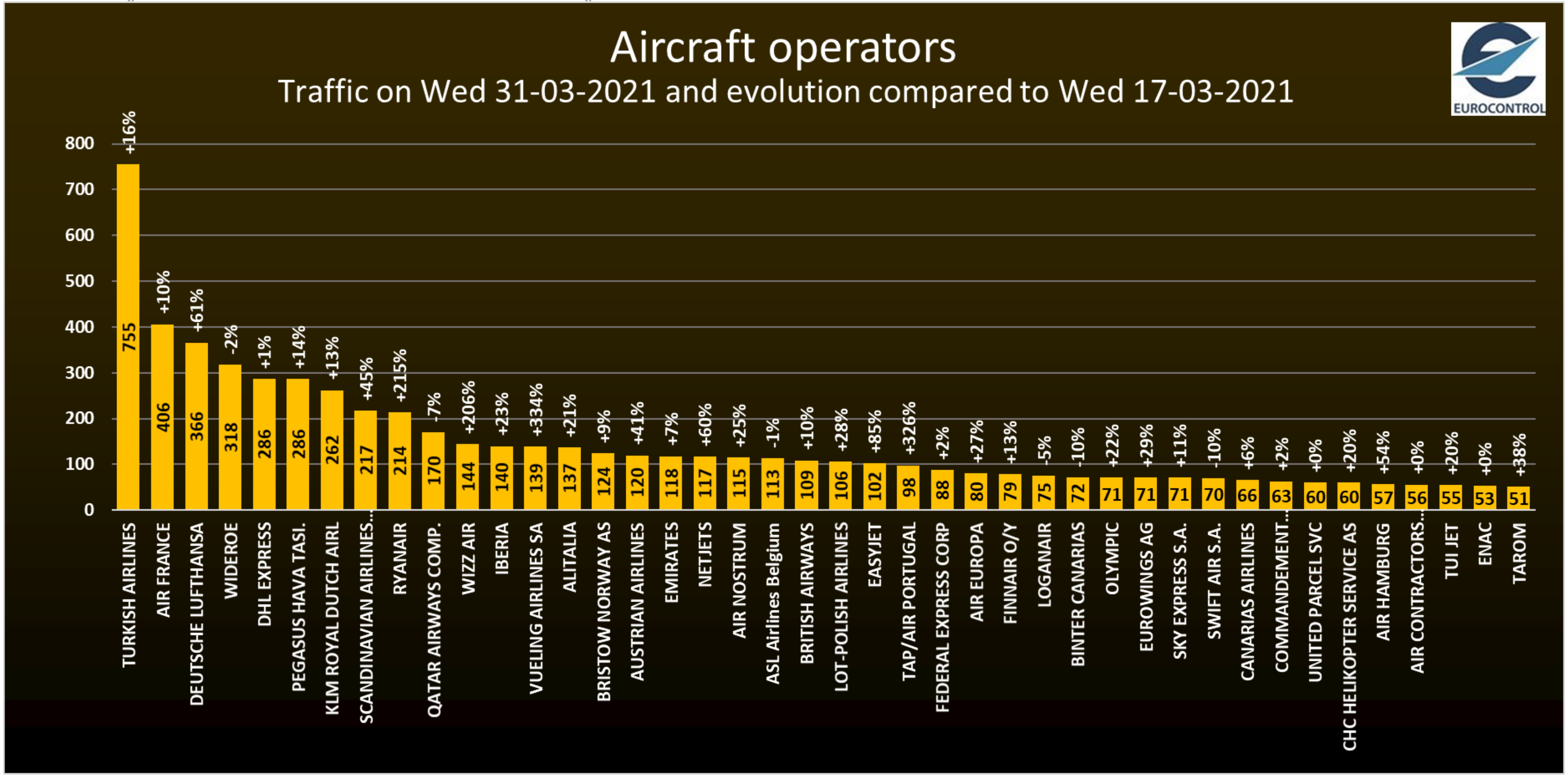
Top 10

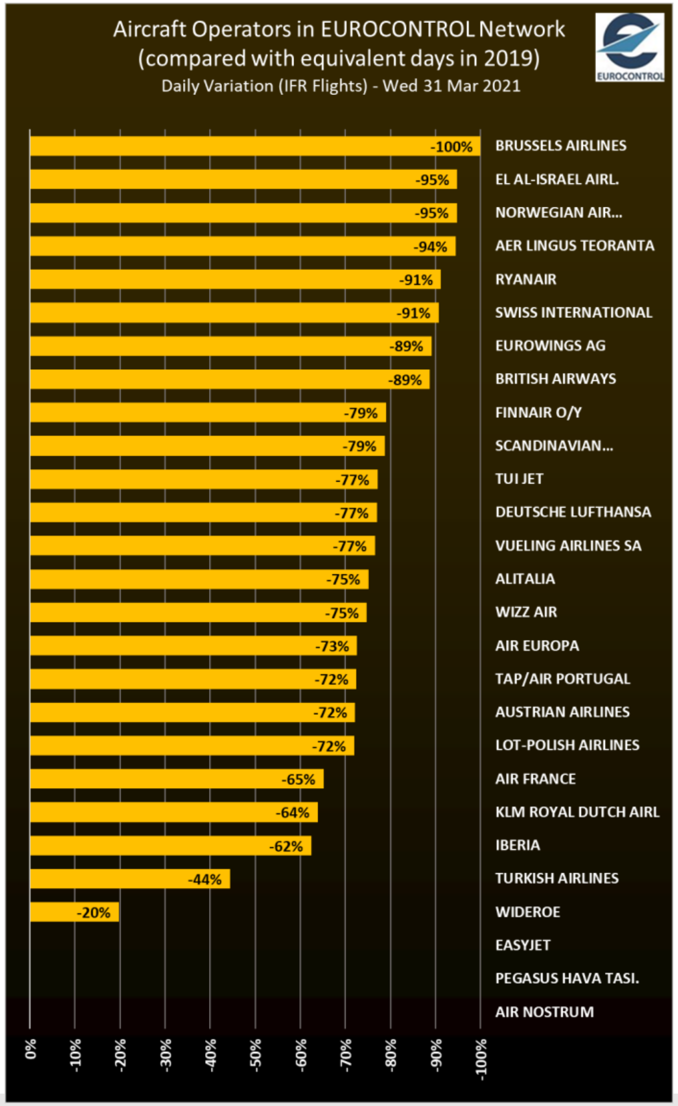
Rank evolution over 2 weeks	Top 10 Aircraft Operators on Wed 31-03-2021				
	Aircraft Operator	Flights	Δ over 2 weeks	% over 2 weeks	% vs 2019
→	TURKISH AIRLINES	755	↗ +102	+16%	↘ -44%
→	AIR FRANCE	406	↗ +36	+10%	↘ -65%
↗	DEUTSCHE LUFTHANSA	366	↗ +139	+61%	↘ -77%
↘	WIDEROE	318	↘ -5	-2%	↘ -20%
↘	DHL EXPRESS	286	↗ +4	+1%	↗ +10%
→	PEGASUS HAVA TASI.	286	↗ +36	+14%	↘ -33%
↘	KLM ROYAL DUTCH AIRL	262	↗ +31	+13%	↘ -64%
↗	SCANDINAVIAN AIRLINES SYSTEM	217	↗ +67	+45%	↘ -79%
↗	RYANAIR	214	↗ +146	+215%	↘ -91%
↘	QATAR AIRWAYS COMP.	170	↘ -13	-7%	↘ -30%

- Increase in the ranking over 2 weeks for Lufthansa, SAS and Ryanair.
- Highest increase over 2 weeks for Ryanair (+215%), 1/3 due to domestic Italian flows, the rest being mainly flows to Southern Europe.
- High increase for Lufthansa (+61%) mainly driven by domestic and flows to Southern Europe (Spain, Italy, Portugal).
- High increase for Turkish Airlines (+16%) mainly driven by domestic flows and flows from Germany.

Aircraft operators (Daily flights)

Top 40 - Latest operations





- 4 freight carriers within the top 40. DHL Express 5th.
- Highest increase for Vueling (+334%), Wizz Air (+206%), TAP/Air Portugal (+326%), SAS (+45%) and easyJet (+85%), whilst Lufthansa grew 32%.
- Ryanair 9th, Wizz Air 11th, easyJet 23rd and British Airways 31st.

Aircraft operators

Latest news

European airlines

- **airBaltic** confirms plans for an IPO.
- **Aer Lingus** plans four new trans-Atlantic services from Manchester.
- **Air Portugal** starts Lisbon-Cancun service.
- European Commission approves €24.7 million in Italian State aid to **Alitalia.**
- **Austrian Airlines** reports an increase of 50% in flight bookings for July/August 2021 compared to January.
- **Brussels Airlines** signs a deal with Nordic tour operator to offer direct flights to Finland, Sweden and Norway (especially Lapland and southern Norway) in summer and winter seasons.
- **Finnair** to resume Helsinki-Moscow service in April.
- **Finnair** signs letter of interest for up to 20 19-seater electric aircraft, expected to be available in 2026.
- **Lot** resumes Warsaw – Saint Petersburg service.

- **Norse Atlantic Airways** to lease 6 787-9 and 3 787-8 for their launch in December 2021.
- **Ryanair** launches an expanded UK summer schedule with over 2,300 weekly flights across 480 routes, including 26 new routes to popular holiday destinations in the rest of Europe; CEO expresses high degree of confidence in a significant recovery for the summer season; to reopen Zadar base in July.
- **Sky Express** has taken delivery of 2 new A320neo.
- **Virgin Atlantic** notes that it has operated more than 4,000 cargo only operations since March 2020.
- **Wizz** opens new base at Bari serving 17 destinations.

Aircraft operators

Latest news

Worldwide airlines

- **Air NewZealand** domestic business travel returns to 90% of pre-COVID levels.
- **Bamboo Airways** has received slots to operate 6 flights/week to LHR from Hanoi and Ho Chi Min City.
- **China Eastern** to serve 184 destinations in summer 2021.
- **China Southern Airlines** reports USD1.7 billion operating loss for 2020.
- **Ethiopian Airlines** has operated 5,645 cargo services with modified passenger aircraft since March 2020; to trial IATA's travel pass.
- **Etihad Airways** reports some routes recovering, notably to Pakistan and Bangladesh; full recover expected by 2024.

- **Oman Air** to resume twice-weekly Muscat-Milan service.
- **Qatar Airways** to serve over 140 destinations in summer 2021.
- **Sichuan Airlines** began Chongqing-Brussels cargo service.
- **United Airlines** to launch multiple domestic services from May 2021; resumes services from JFK to LA and San Francisco.
- **WestJet** partnering with the Government of British Columbia to return approx. 200 furloughed staff to work to assist with vaccination clinics; to launch 11 new services from June.

States (Daily Departure/Arrival flights)

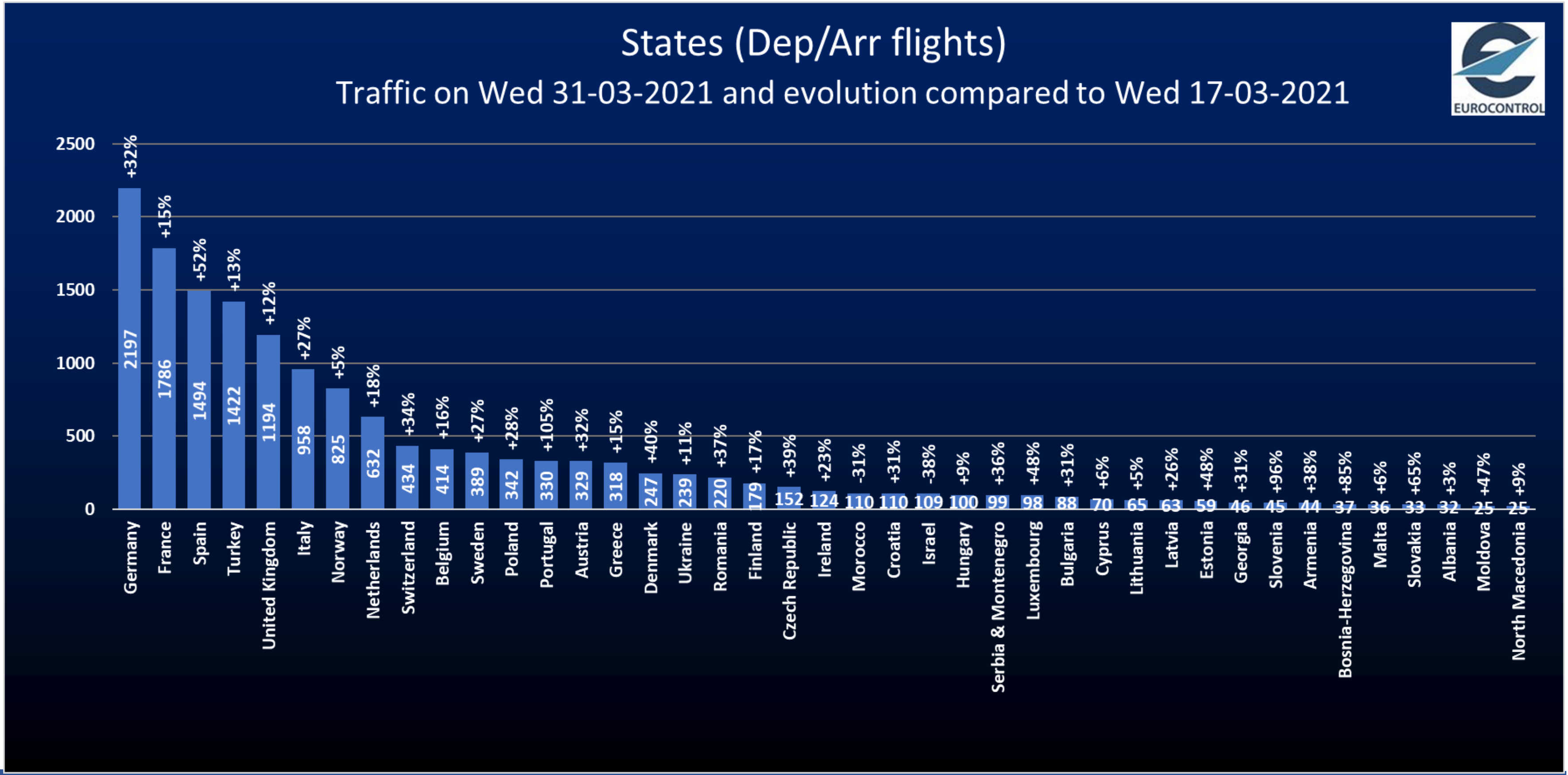
Top 10

Rank evolution over 2 weeks	State	Flights (Dep/Arr)	Δ over 2 weeks	% over 2 weeks	% vs 2019
	Top 10 States on Wed 31-03-2021				
→	Germany	2197	↗ +537	+32%	↘ -64%
→	France	1786	↗ +236	+15%	↘ -59%
↗	Spain	1494	↗ +510	+52%	↘ -67%
↘	Turkey	1422	↗ +169	+13%	↘ -42%
↘	United Kingdom	1194	↗ +126	+12%	↘ -80%
↗	Italy	958	↗ +202	+27%	↘ -73%
↘	Norway	825	↗ +42	+5%	↘ -50%
→	Netherlands	632	↗ +97	+18%	↘ -63%
↗	Switzerland	434	↗ +109	+34%	↘ -67%
↘	Belgium	414	↗ +58	+16%	↘ -59%

- 2-digit increase for almost all top 10 States.
- Increase in the ranking over 2 weeks for Spain, Italy and Switzerland.
- Highest increase for Germany (+32%) mainly driven by domestic flows, small aircraft and flows to Southern Europe.
- High increase for Spain (+52%) mainly driven by domestic flows and flows from Northern Europe (Germany, UK, France).
- High increase for France (+15%), Italy(+27%) and Turkey (+13%).

States (Daily Departure/Arrival flights)

Latest traffic situation



- Strong increase for Portugal (+105% over 2 weeks), 1/3 due to domestic traffic, the rest due to flows from/to Northern Europe and Spain.
- Traffic levels ranging from -84% (Ireland) to -17% (Armenia), compared to 2019.
- Morocco suspends air services to and from France and Spain as of 30 March.

Industry, Associations and Institutions

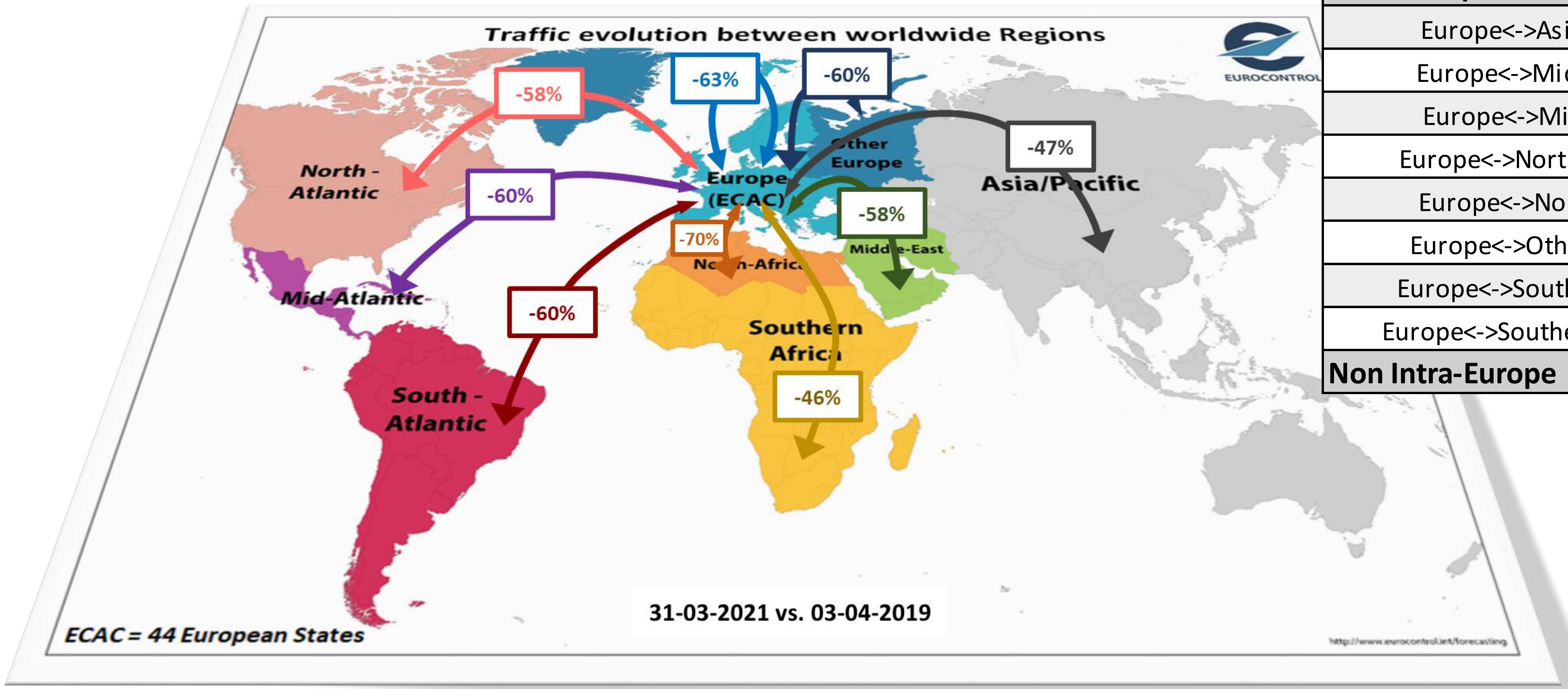
- **Boeing** resuming 787 deliveries after a five month pause for inspections.
- **Embraer** CEO states that 2021 deliveries are expected to be a bit better than in 2020 but that sales will not return to pre-COVID levers until 2024 or 2025.

- **IATA** reports that number of airport pairs in March 2021 was 50% of pre-pandemic.
- **ICAO** approves a revised version of its Testing and Cross-Border Risk Management Measures Manual.
- **WTTC** publishes 2020 Economic Impact review, estimating the global travel & tourism sector lost almost $4.5 trillion in revenue in 2020.

- **CAAC** approves 54 new domestic services for summer 2021
- **EASA** publishes aircrew vaccination recommendations, recommending vaccination but with a waiting period after each dose.

Traffic flows (Daily Departure/Arrival flights)

- The main traffic flow is the intra-Europe flow with 9,088 flights on Wednesday 31 March, which is increasing (+25%) over 2 weeks.
- Intra-Europe flights are at -63% compared to 2019 while intercontinental flows are at -58%.



REGION	17-03-2021	31-03-2021	%	vs. 2019
Intra-Europe	**7 295**	**9 088**	***+25%***	***-63%***
Europe<->Asia/Pacific	418	418	*+0%*	*-47%*
Europe<->Mid-Atlantic	65	67	*+3%*	*-60%*
Europe<->Middle-East	562	576	*+2%*	*-58%*
Europe<->North Atlantic	420	471	*+12%*	*-58%*
Europe<->North-Africa	276	271	*-2%*	*-70%*
Europe<->Other Europe	301	345	*+15%*	*-60%*
Europe<->South-Atlantic	55	68	*+24%*	*-60%*
Europe<->Southern Africa	154	172	*+12%*	*-46%*
Non Intra-Europe	**2 251**	**2 388**	***+6%***	***-58%***

Country pairs (Daily Departure/Arrival flights)

Top 10

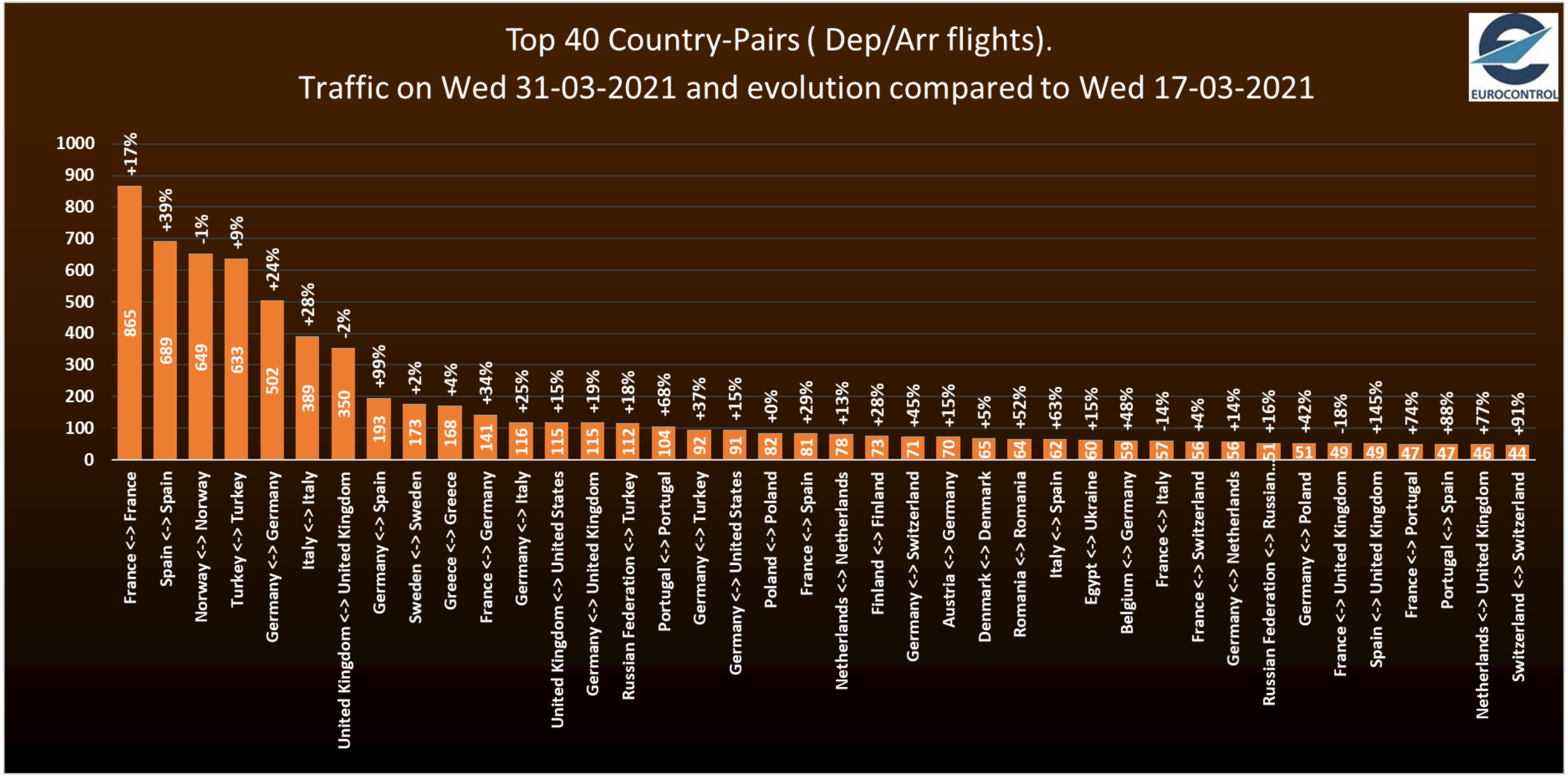
Rank evolution over 2 weeks	Country-Pair	Dep/Arr Flights	Δ over 2 week	% over 2 week	% vs 2019
→	France <-> France	865	+124	+17%	-31%
↗	Spain <-> Spain	689	+193	+39%	-46%
↘	Norway <-> Norway	649	-4	-1%	-34%
↘	Turkey <-> Turkey	633	+53	+9%	-34%
→	Germany <-> Germany	502	+97	+24%	-56%
↗	Italy <-> Italy	389	+85	+28%	-53%
↘	United Kingdom <-> United Kingdo	350	-7	-2%	-69%
↗	Germany <-> Spain	193	+96	+99%	-63%
↘	Sweden <-> Sweden	173	+4	+2%	-65%
↘	Greece <-> Greece	168	+6	+4%	-41%

Top 10 Country-Pair on Wed 31-03-2021

- 9 of the top 10 flows are domestic.
- Highest increase for domestic flows
  - in Spain (+39%) mainly Vueling, Air Nostrum and Canary Fly.
  - France (+17%) mainly light aircraft.
  - Germany (+24%) mainly light aircraft, Lufthansa and German Wings.
  - Italy (+28%) mainly Ryanair, Wizz Air, Alitalia and Blue Air.
- High increase for the flow Germany-Spain (+99%) mainly due to Lufthansa, Condor, TUI and Eurowings.

Country pairs (Daily Departure/Arrival flights)

Latest traffic situation



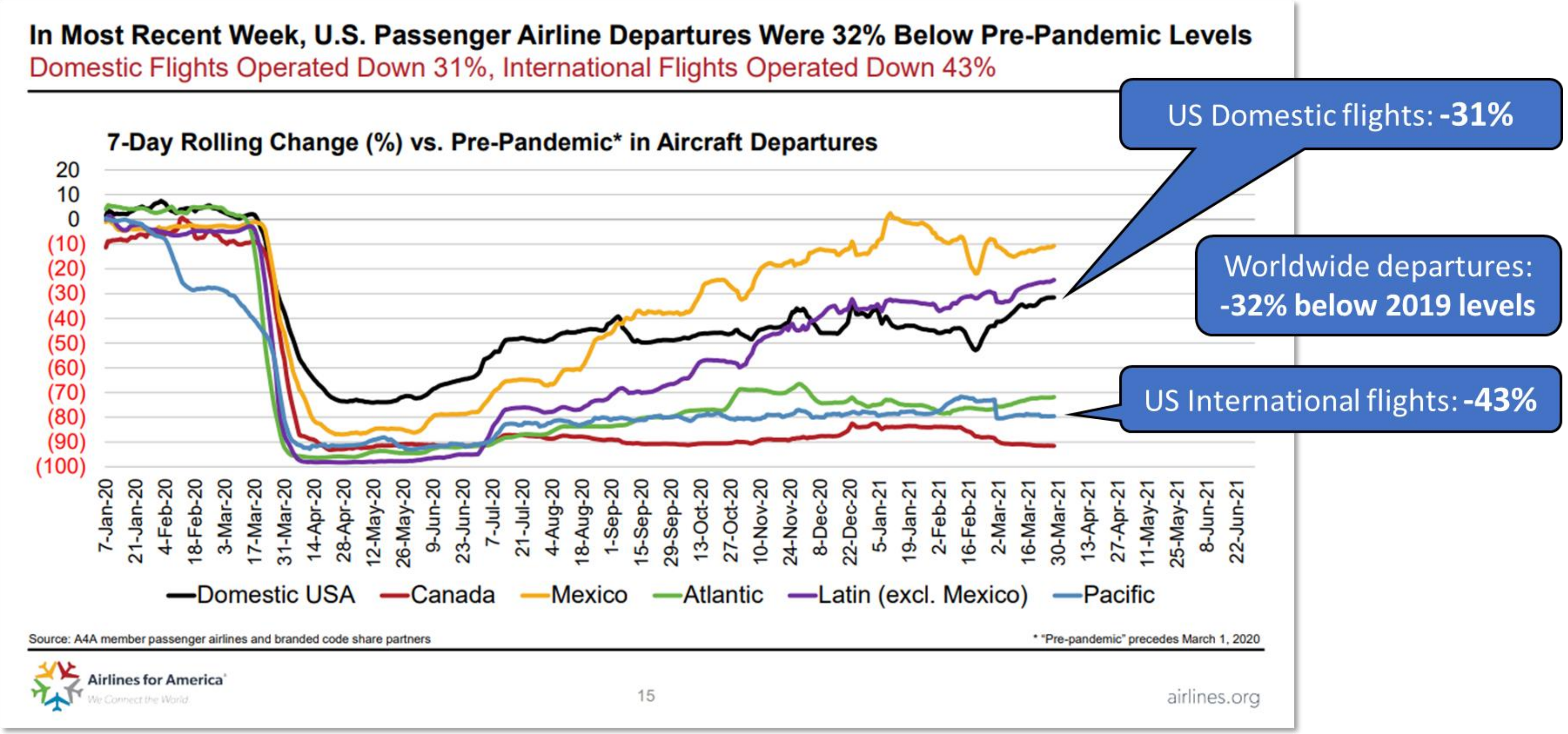
The busiest non-domestic flows were:

- **France-Spain** (193 flights, +99% over 2 weeks).
- **France-Germany** (141, +34%).
- **Germany-Italy** (116, +25%).
- **UK-US** (115, +15%).
- **Germany-UK** (1152, +19%).
- **Russia-Turkey** (112, +18%).

Outside Europe

USA

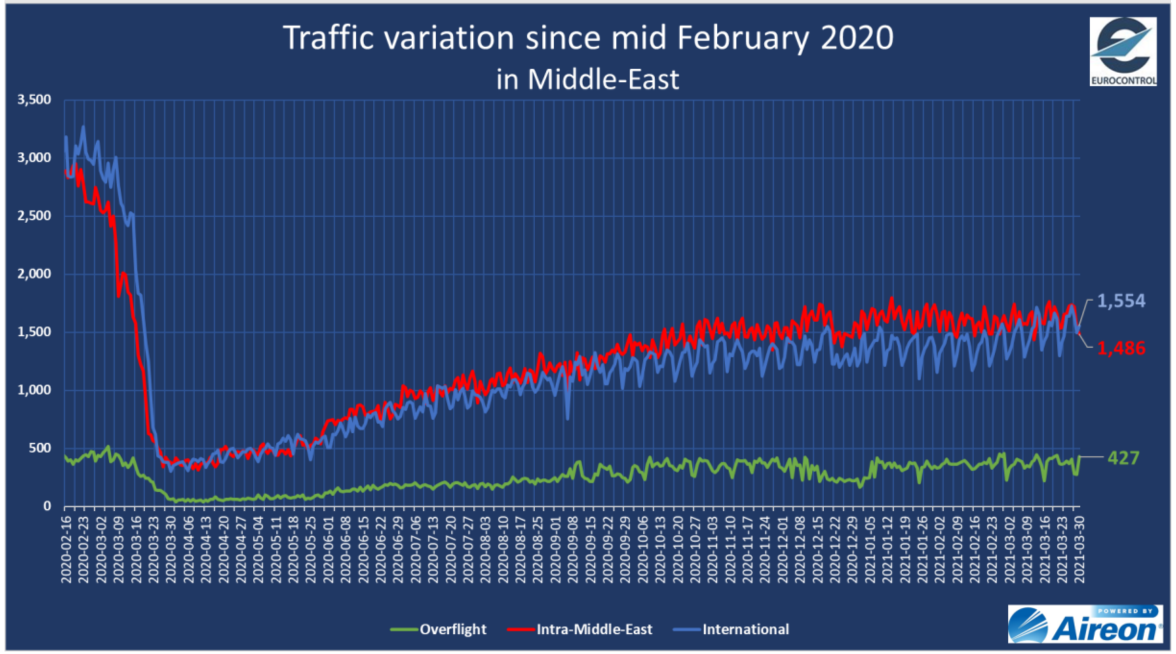
- Bookings are gradually improving on rising vaccination rates and easing travel restrictions.
- US domestic recorded a decline of 31% (vs 2019) and international traffic recorded a decline of 43% (vs 2019) on 30 March.
- On 30 March, US airline passenger volumes were 43% below 2019 levels with domestic down 41% and international down 58%.
- The domestic US load factor has improved recently, averaging at 73% on 30 March vs 87% a year earlier.
- A4A estimates US unlikely to see a return to 2019 passenger volumes before 2023-2024. 2021-2022 will be clouded by uncertainty: state of pandemic, vaccination and therapeutics, economy.



Outside Europe

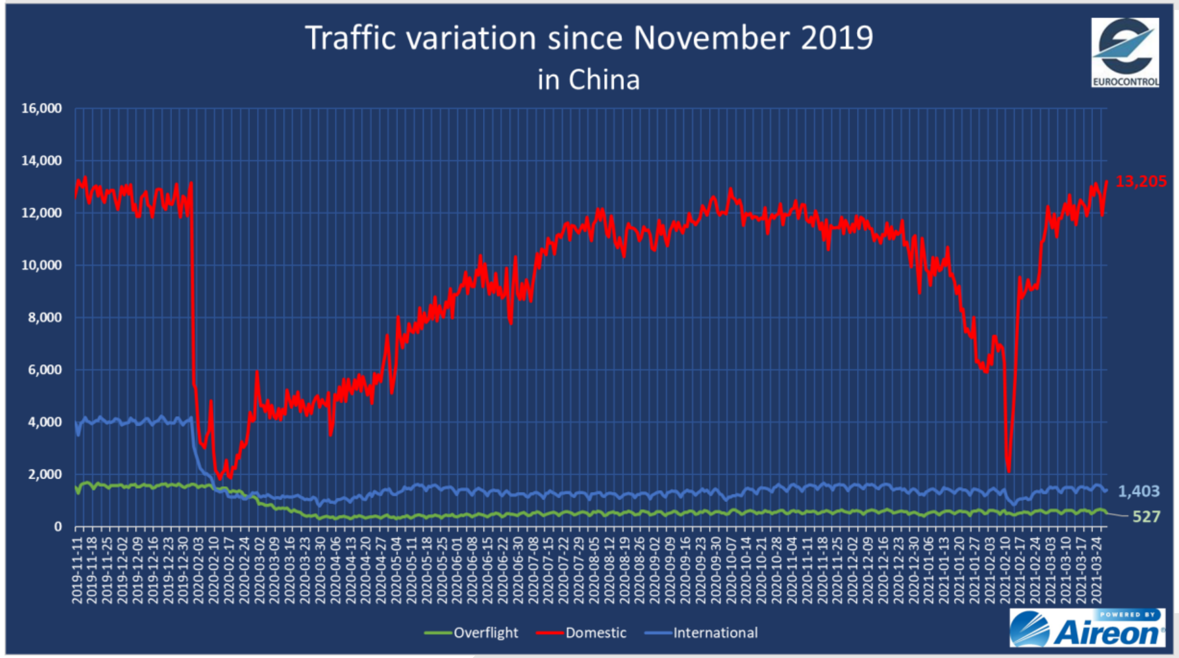
Middle East

- Intra-Middle-East traffic recorded around 1,486 daily flights on 30 March (-47% compared to Feb 2020).
- On 30 March, international traffic from and to Middle-East recorded 1,554 flights (-49% compared to Feb 2020).
- Overflights were stable around 427 flights (0% compared to Feb 2019).



China

- After the huge drop on Chinese New Year, the number of Chinese domestic flights has now resumed to "pre-COVID" levels. On 29 March, domestic traffic recorded just above 13,200 flights (+11% compared to January 2020 levels).
- International flights and overflights are still suppressed, they were stable on previous weeks with 1,403 and 527 flights respectively (-65% and -67% vs 1 Jan 2020).



Airports (Daily Departure/Arrival flights)

Top 10 and latest news

Rank evolution over 2 weeks	Top 10 Airports on Wed 31-03-2021				
	Airport	Dep/Arr Flights	∆ over 2 weeks	% over 2 weeks	% vs 2019
→	IGA Istanbul Airport	651	↗ +101	+18%	Not appl
↗	Frankfurt	527	↗ +126	+31%	↘ -65%
↘	Paris/Charles-De-Gaulle	519	↗ +59	+13%	↘ -63%
→	Amsterdam	465	↗ +71	+18%	↘ -67%
↗	Madrid/Barajas	414	↗ +72	+21%	↘ -65%
↘	Istanbul/Sabiha Gokcen	405	↗ +59	+17%	↘ -31%
→	London/Heathrow	323	↗ +15	+5%	↘ -76%
↗	Munich	264	↗ +91	+53%	↘ -78%
↘	Leipzig/Halle	241	↗ +18	+8%	↘ -3%
↗	Vienna	231	↗ +50	+28%	↘ -73%

- Increase in the ranking over 2 weeks for Frankfurt, Madrid, Munich and Vienna.
- Most top 10 airports showed a 2-digit increase over 2 weeks.
- Highest increase for Frankfurt (+31%) mainly due to Lufthansa and flows to Spain.
- High increase for IGA Istanbul (+18%) mainly due to Turkish Airlines and domestic flows.
- High increase for Munich (+53%) mainly due to Lufthansa and many flows.

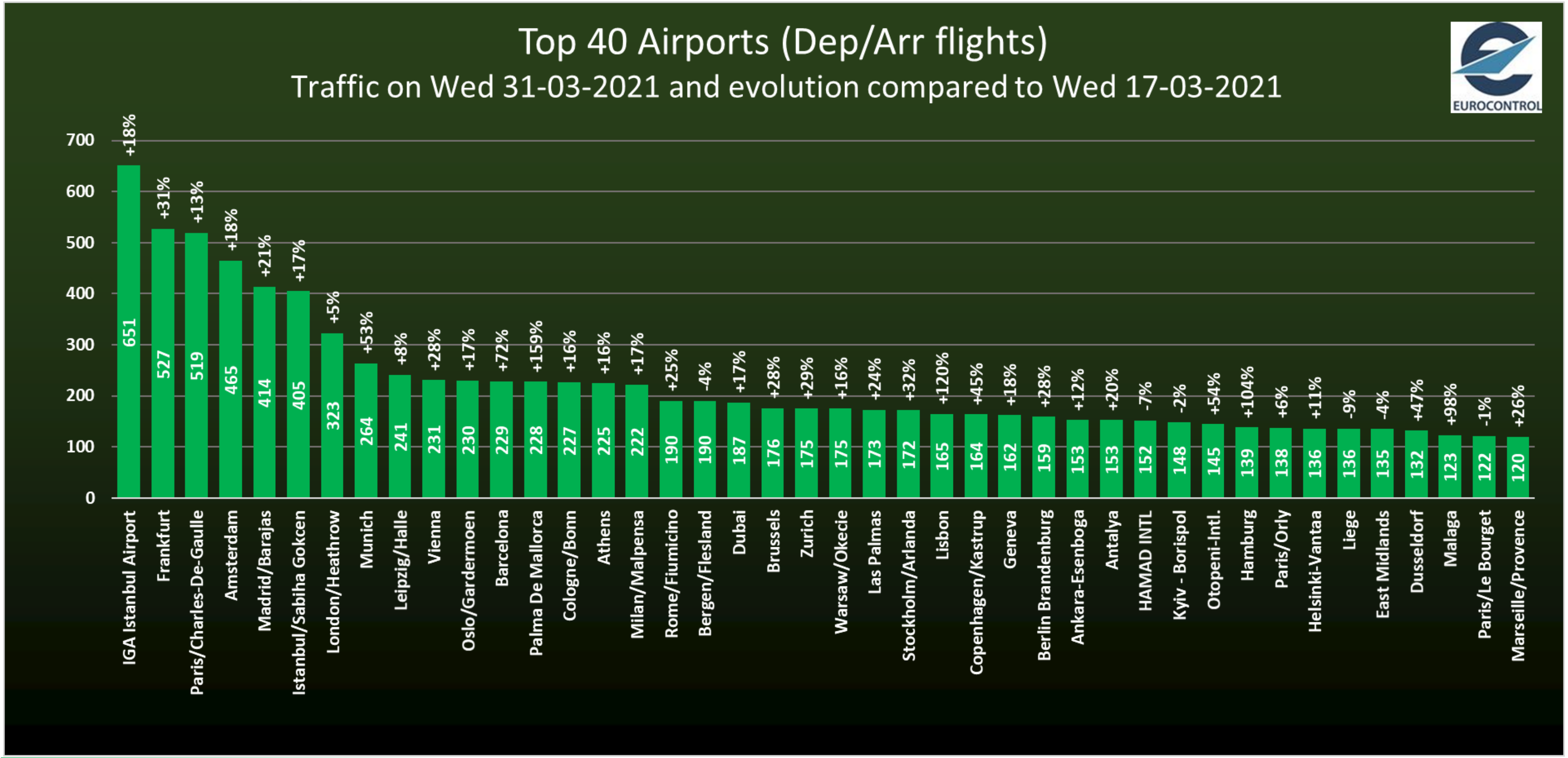
Airports

Latest news

- **Aéroports de Montreal** suspending all development projects to decrease costs; Montreal International Airport February passenger numbers down 92.8% year-on-year (domestic -87.2%, international -94.8%).
- **Antalya Airport** February passenger numbers down 64.8% year-on-year.
- **German airports** reported passengers down 91.2% in February 2021 with cargo up 14.2%.
- **Hamburg airport** reports a loss of €113M in 2020 forecasts 2021 loss of €90M.
- **Swedavia** achieves net zero emissions at its airports during 2020.

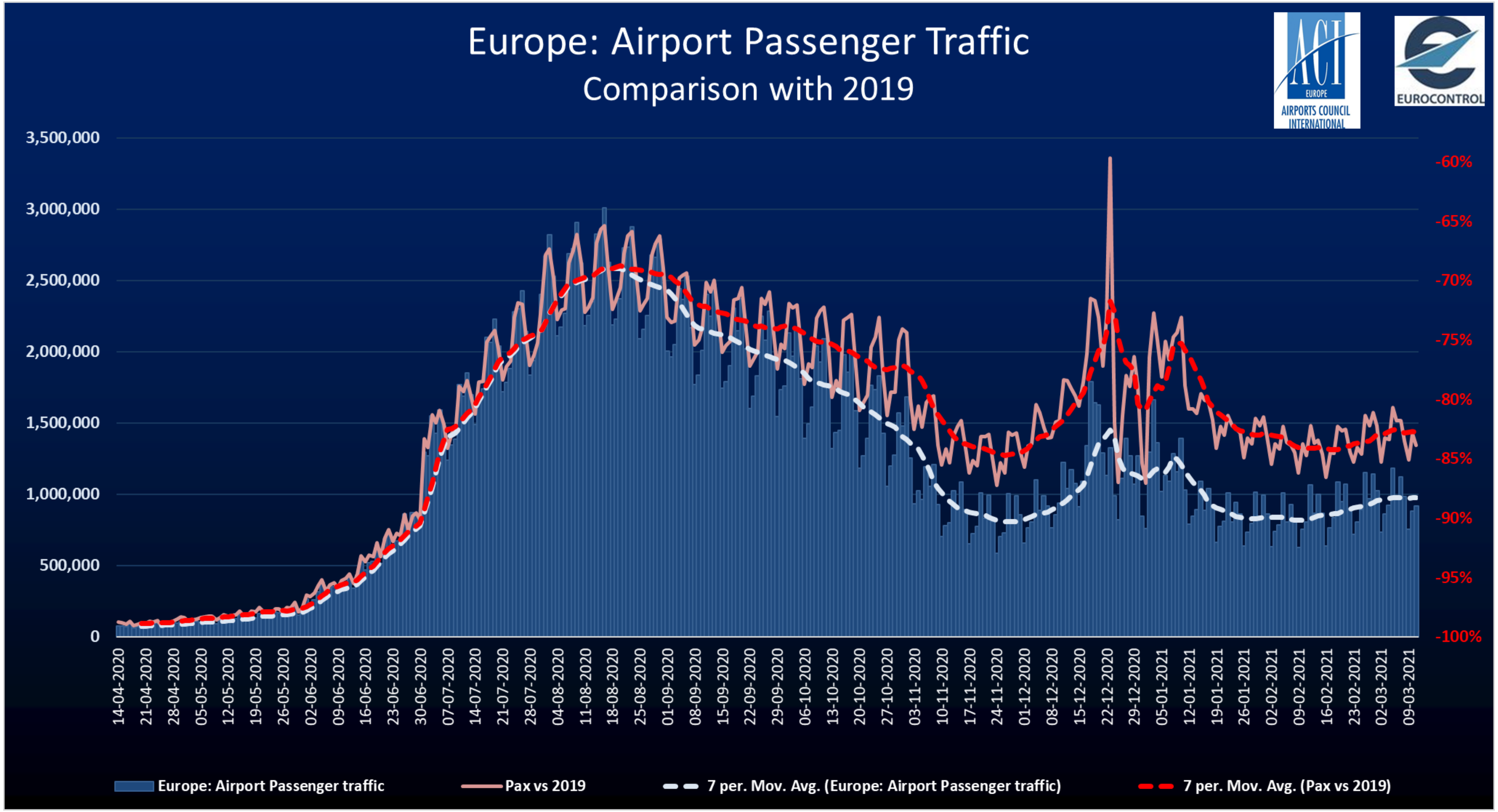
Airports (Daily Departure/Arrival flights)

Latest operations



- Large increase for **Palma** over 2 weeks (+159%) mainly due to flows from Germany and Spain.
- Large increase for **Barcelona** (+72%) mainly due to domestic flows from Vueling.
- Large increase for **Lisbon** (+120%) due to many flows, mainly from TAP/Air Portugal.

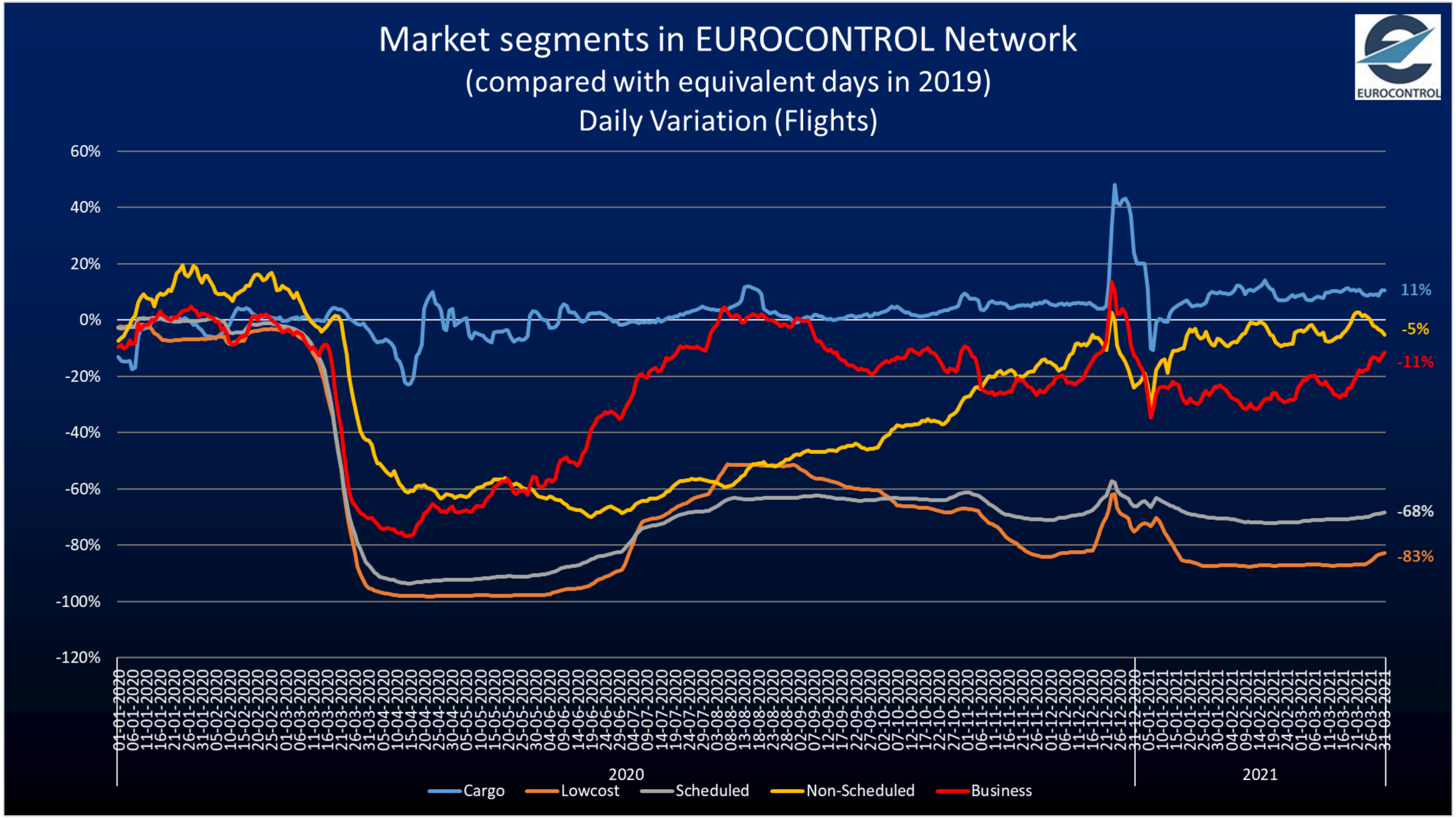
Passengers



- **ACI** recorded just below 918,000 passengers on 11 March 2021, a **loss of 4.8 million passengers** compared to the equivalent day in 2019 (i.e. **-84%**).
- In **2020**, **ACI** Europe reported **passenger** traffic **fell** by **70.4%** while **freight** traffic **decreased** by **11.8%** at European* airports.

* Russia included.

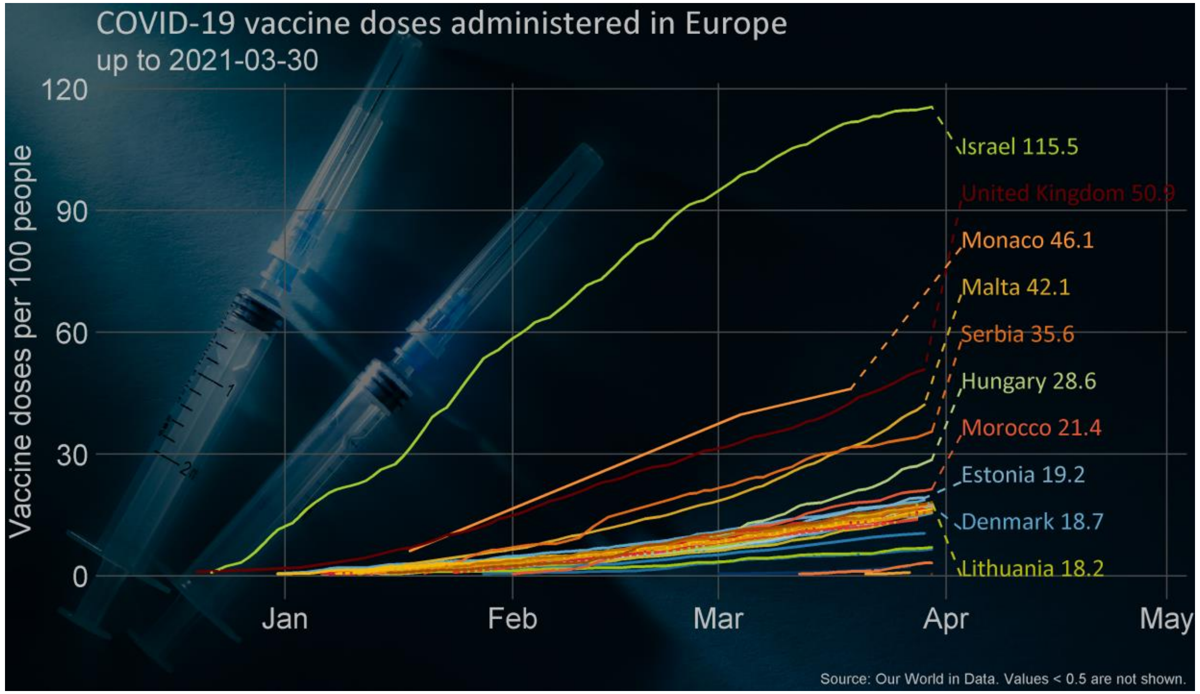
Market Segments

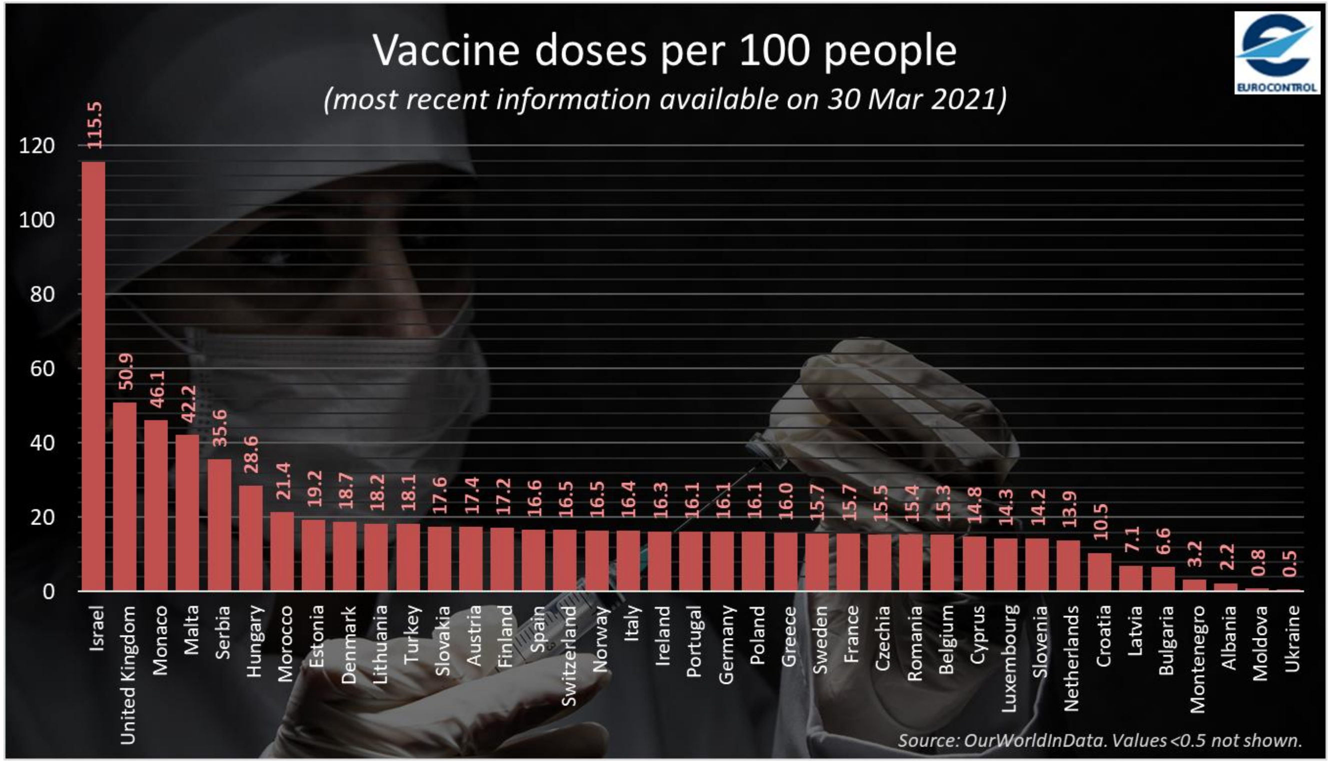


On 30 March 2021, two segments recorded a mild increase ahead of Easter break (vs 2019):

- **All-cargo** is the only segment consistently growing (**+11%**).
- **Charter** oscillates around the zero line (**-5%**).
- **Business Aviation** and **Low-Cost** recorded a slight improvement on recent weeks with respective decreases of **-11%** and **-83%**.
- **Traditional** recorded a very slight increase reaching **-68%**.

Vaccination updates

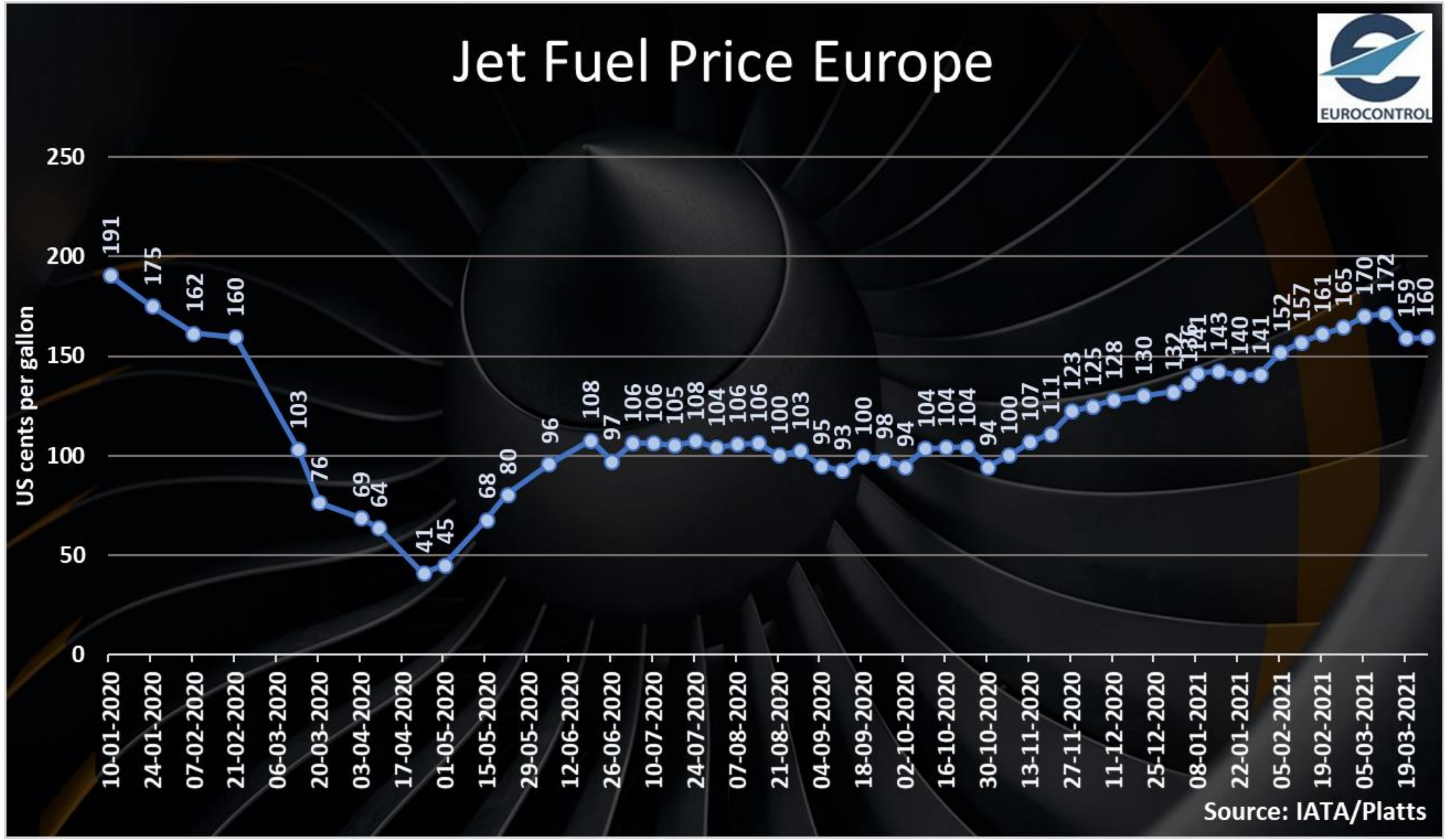




- Inoculations against COVID-19 have started at the end of 2020 as shown with the daily number of COVID-19 vaccination doses administered per 100 people on the left hand-side graph.
- On the right hand-side one: Israel, UK, Monaco, Malta, Serbia and Hungary have reported that more than 25 doses per hundred people had been administered by 30 March 2021.

Graphs are 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 2021 to 170 cts/gal early March. They stabilised ~160 cts/gal since mid-March 2021.

- Underlying reason for the rise in **oil prices** is related to constraints in supply (OPEC+ extended the existing oil production cuts through April 2021), combined with supply disruptions in the United States, and an attack of an oil terminal in Saudi Arabia.

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