12 August 2021

COVID 19 IMPACT ON EUROPEAN AVIATION

EUROCONTROL
Comprehensive Assessment

Headlines

- **23,515** flights (67% of 2019 levels) on Wed 11 August 2021, slight increase over 2 weeks (+2%).
- After a continuous increase since mid May, the traffic at network level reached its maximum on 30 July 2021 with 25,921 flights (-26.2% vs 2019).
- Traffic for 1-11 Aug was at 70% of 2019 levels.
- **Ryanair**, busiest operator, added the most capacity over two weeks (+174 flights) followed by easyJet (+109) and Vueling (+56). Pegasus and Wizz Air have almost recovered 2019-equivalent traffic volumes.
- Highest increases for the flows Greece-UK, Greece-Italy and Italy-Spain. As well as dep/arr flights in the UK, Italy and Greece.
- Largest increase in flights for Rome/Fiumicino (+66 flights over 2 weeks), Manchester (+50), London/Luton (+42), IGA Istanbul (+41) and London/Gatwick (+40). Decrease for Palma de Mallorca (-24 flights).
- Domestic traffic vs 2019: Europe (-30%), US (-17%), **China (-51%) (COVID resurgence)**, Middle-East (-26%)

Traffic Situation

EUROCONTROL

Daily flights (including overflights)

Traffic over the last 7 days is

↓30%

Compared to equivalent days in 2019

Top 10 Aircraft Operators

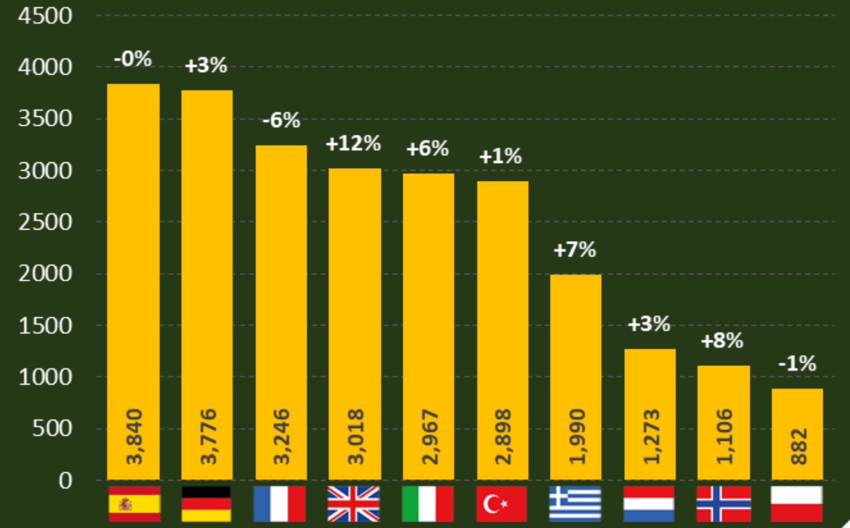
on Wed 11 August 2021 (daily flights)

1. Ryanair: Operated **2208 flights** ↓15% of same day in 2019, ↑9% over 2 weeks
2. Turkish Airlines: Operated **1260 flights** ↓15% of same day in 2019, ↑2% over 2 weeks
3. easyJet: Operated **1009 flights** ↓46% of same day in 2019, ↑12% over 2 weeks
4. Air France: Operated **781 flights** ↓30% of same day in 2019, ↓4% over 2 weeks
5. Lufthansa: Operated **746 flights** ↓50% of same day in 2019, ↓0% over 2 weeks
6. KLM: Operated **725 flights** ↓23% of same day in 2019, ↑2% over 2 weeks
7. Wizz Air: Operated **644 flights** ↓7% of same day in 2019, ↑8% over 2 weeks
8. Vueling: Operated **534 flights** ↓28% of same day in 2019, ↑12% over 2 weeks
9. Pegasus: Operated **488 flights** ↓8% of same day in 2019, ↓4% over 2 weeks
10. SAS: Operated **345 flights** ↓60% of same day in 2019, ↓9% over 2 weeks

Top 10 Busiest States

on Wed 11 August 2021

(Dep/Arr flights and variation over 2 weeks)



Top 10 Busiest Airports

7-day average Dep/Arr flights on 5-11 August, compared to 2019

Top 10 Airports	Average flights per day (week 5-11/8)	Average flights per day (week 5-11/8) vs 2019
Amsterdam	1063	-28%
IGA Istanbul Airport	999	-24%
Paris/Charles-De-Gaulle	943	-37%
Frankfurt	932	-37%
Palma De Mallorca	763	-18%
Antalya	752	-23%
Madrid/Barajas	747	-37%
Athens	706	-15%
Barcelona	701	-34%
Istanbul/Sabiha Gokcen	649	-6%

Market Segments

On 11 Aug, compared to 2019

↓32% Low cost

↓41% Traditional

↑21% Business Aviation

↓12% Non-Scheduled/ Charter

↑13% All Cargo

Traffic Flow

On 11 April, the **intra-European** traffic flow was

19,025 flights

+2% over past **2 weeks**

-30% Compared to **2019**

Route charges

(June 2021)

Amount billed:

€ 320 million

Jan-Jun 2021 amount billed:

€ 1,300 million

vs. Jan-Jun 2019

↓ **(-65%)**

Source: EUROCONTROL

Economics

(6 August 2021)

Fuel price

↓ **183**

Cents/gallon

compared to **193** cents/gallon on 30 July 2021

Source: IATA/Platts

Passengers

(15 July 2021)

3.7 million pax

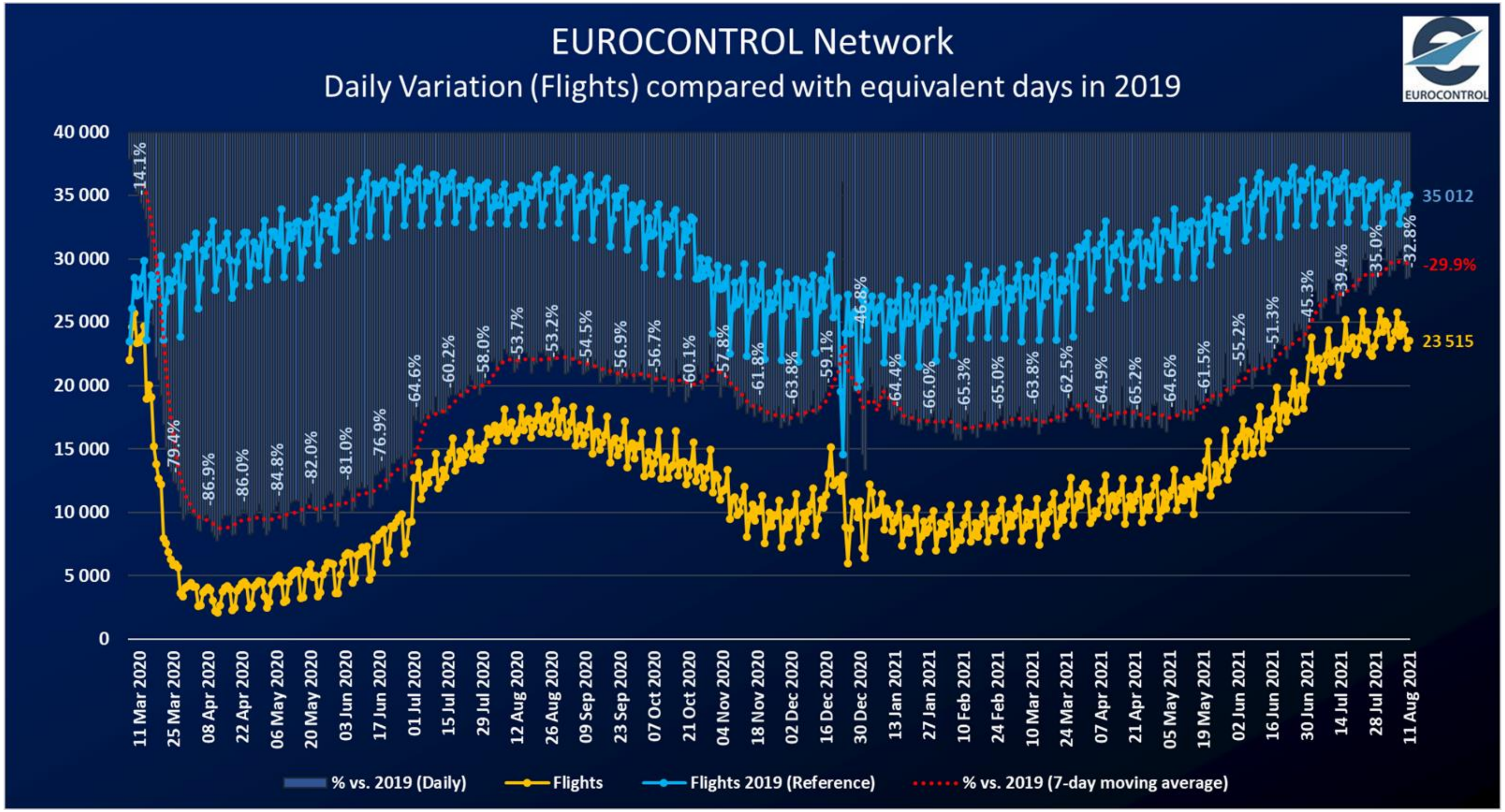
-4.3 million vs. 2019

(-54%)

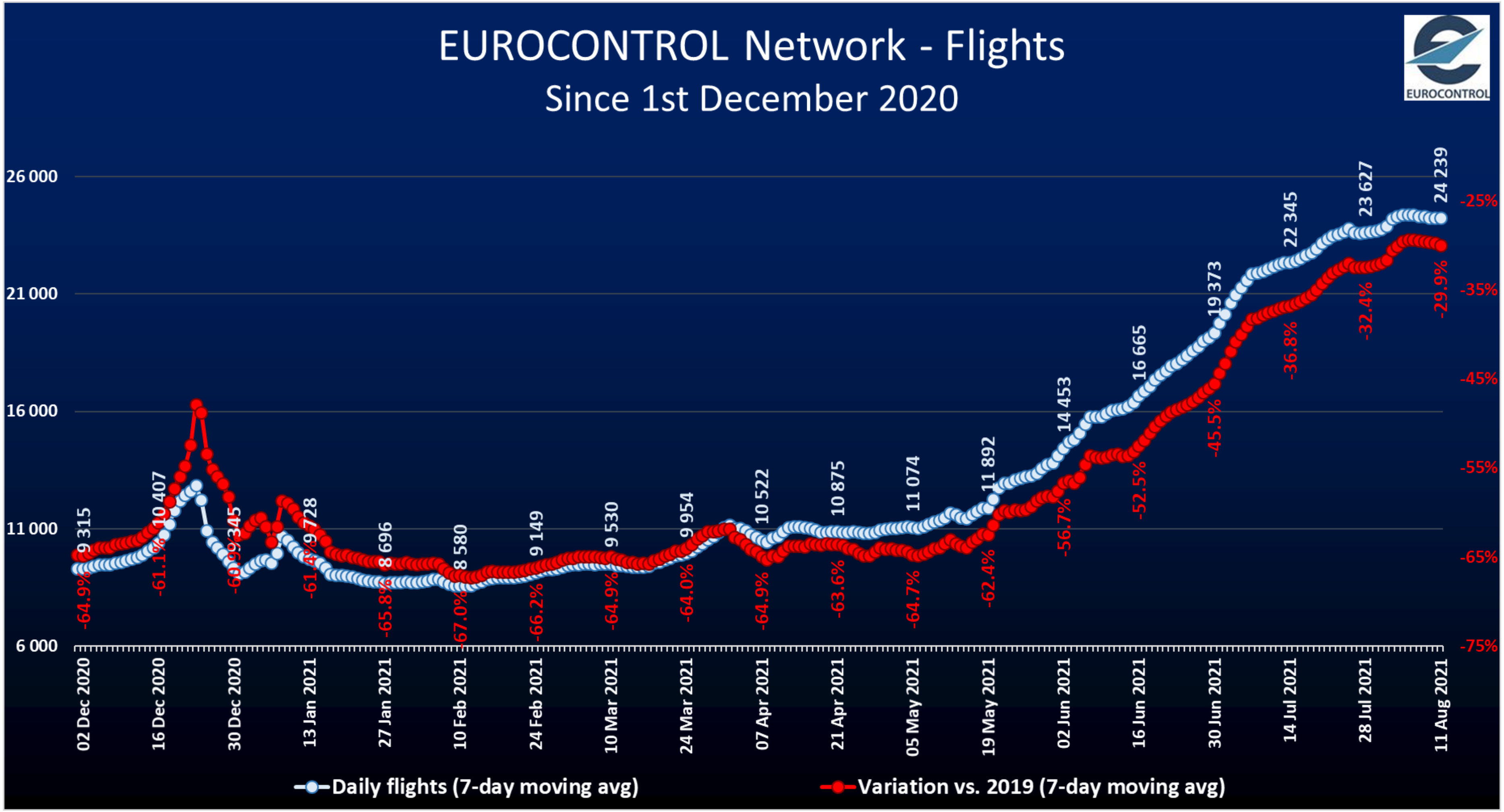
Source: ACI

Overall traffic situation at network level

- **23,515 flights** on Wednesday 11 August.
- **+2%** with **+443 flights** over 2 weeks (from Wednesday 28 July).
- **-0%** with **-14 flights** over 1 week (from Wednesday 4 August).
- **67%** of 2019 traffic levels.



Current traffic evolution

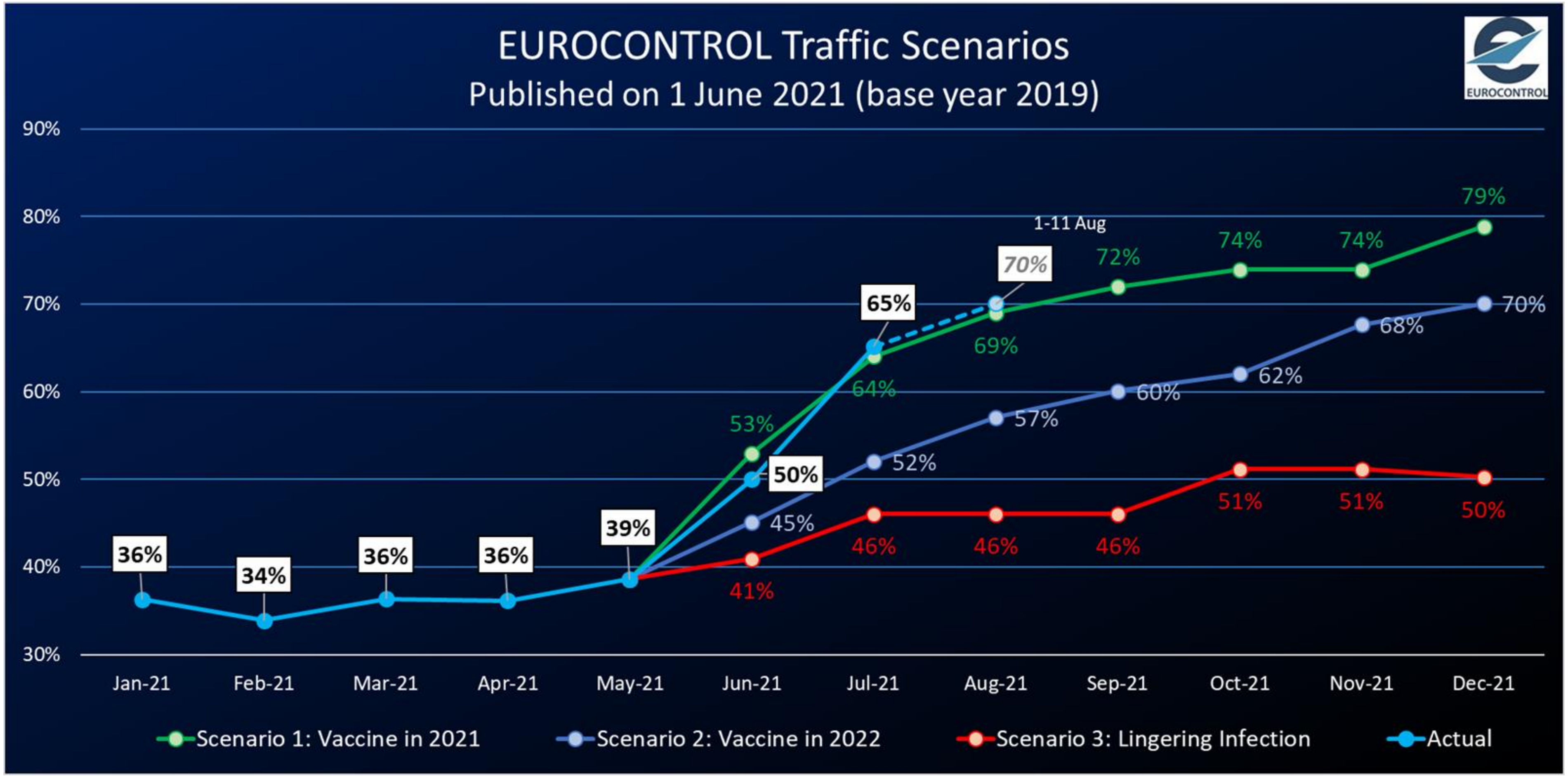


- After a continuous increase since mid May, the traffic at network level has reached its maximum on 30 July 2021 with 25,921 flights (-26.2% vs 2019).
- Since then, the traffic has been slightly decreasing.

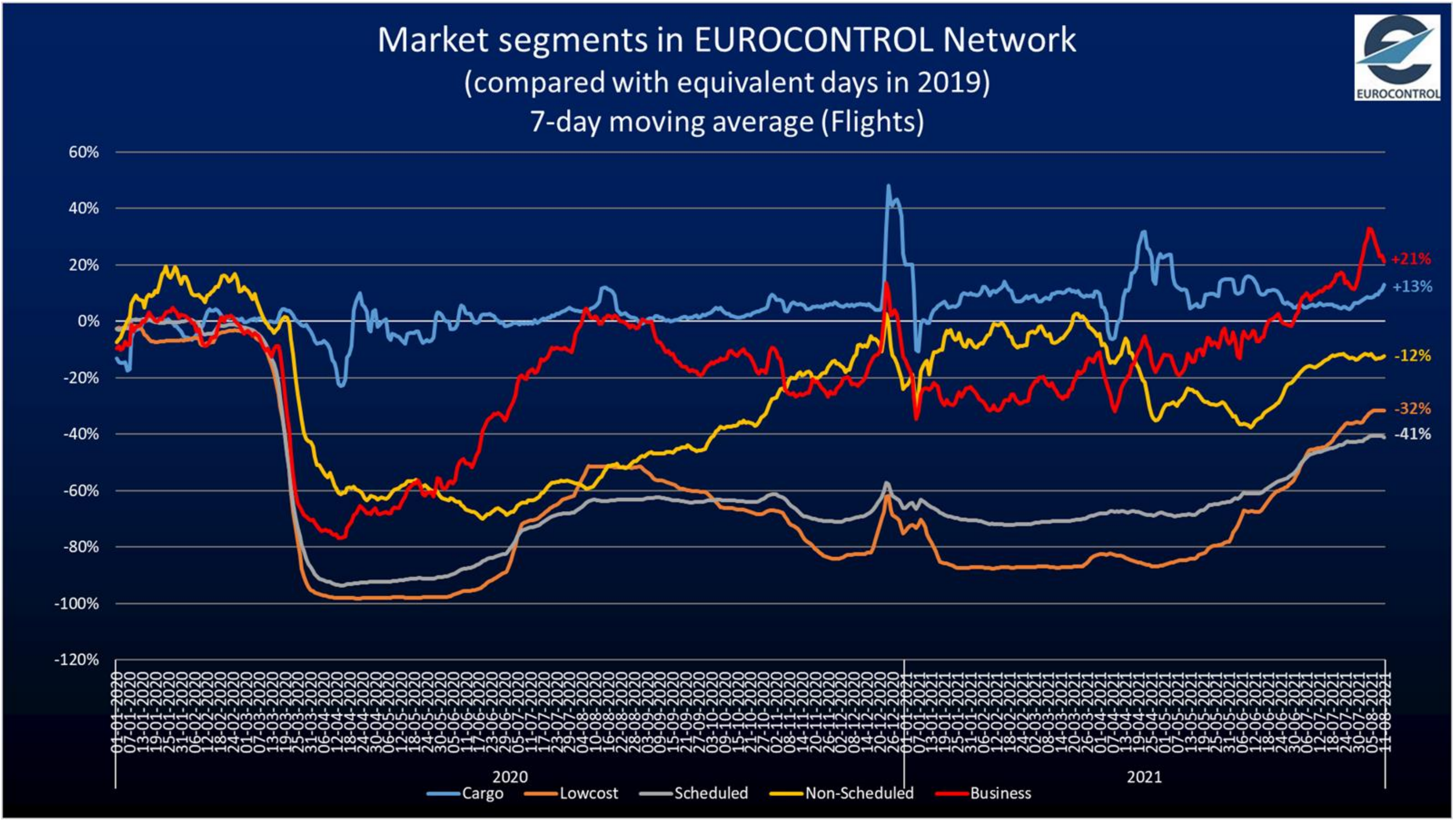
Current situation compared to the latest EUROCONTROL traffic scenarios

- **Traffic** is at **70%** for 1-11 August 2021 compared to 1-11 August 2019.

- This is in line with the most optimistic scenario of the latest EUROCONTROL traffic scenarios published on 1 June 2021.



Market Segments



On 11 August 2021, compared to 2019:

- **All-cargo** and **Business Aviation** are the only segments above 2019 levels with **+13%** and **+21%** respectively.
- **Charter** is stable at **-12%** vs 2019.
- **Traditional** and **Low-Cost** have consistently increased over the last two months and have now stabilized at **-32%** vs 2019 for low-costs and **-41%** for traditional.

Aircraft operators (Daily flights)

Top 10

Rank evolution over 2 weeks	Aircraft Operator	Flights	∆ over 2 weeks	% over 2 weeks	% vs 2019
	Top 10 Aircraft Operators on Wed 11-08-2021				
→	Ryanair	2208	↗ +174	+9%	↘ -15%
→	Turkish Airlines	1260	↗ +23	+2%	↘ -15%
→	easyJet	1009	↗ +109	+12%	↘ -46%
→	Air France	781	↘ -33	-4%	↘ -30%
→	Lufthansa	746	→ +0	+0%	↘ -50%
→	KLM	725	↗ +14	+2%	↘ -23%
→	Wizz Air	644	↗ +47	+8%	↘ -7%
↗	Vueling	534	↗ +56	+12%	↘ -28%
↘	Pegasus	488	↘ -20	-4%	↘ -8%
→	SAS	345	↘ -35	-9%	↘ -60%

Highest increase over 2 weeks for:

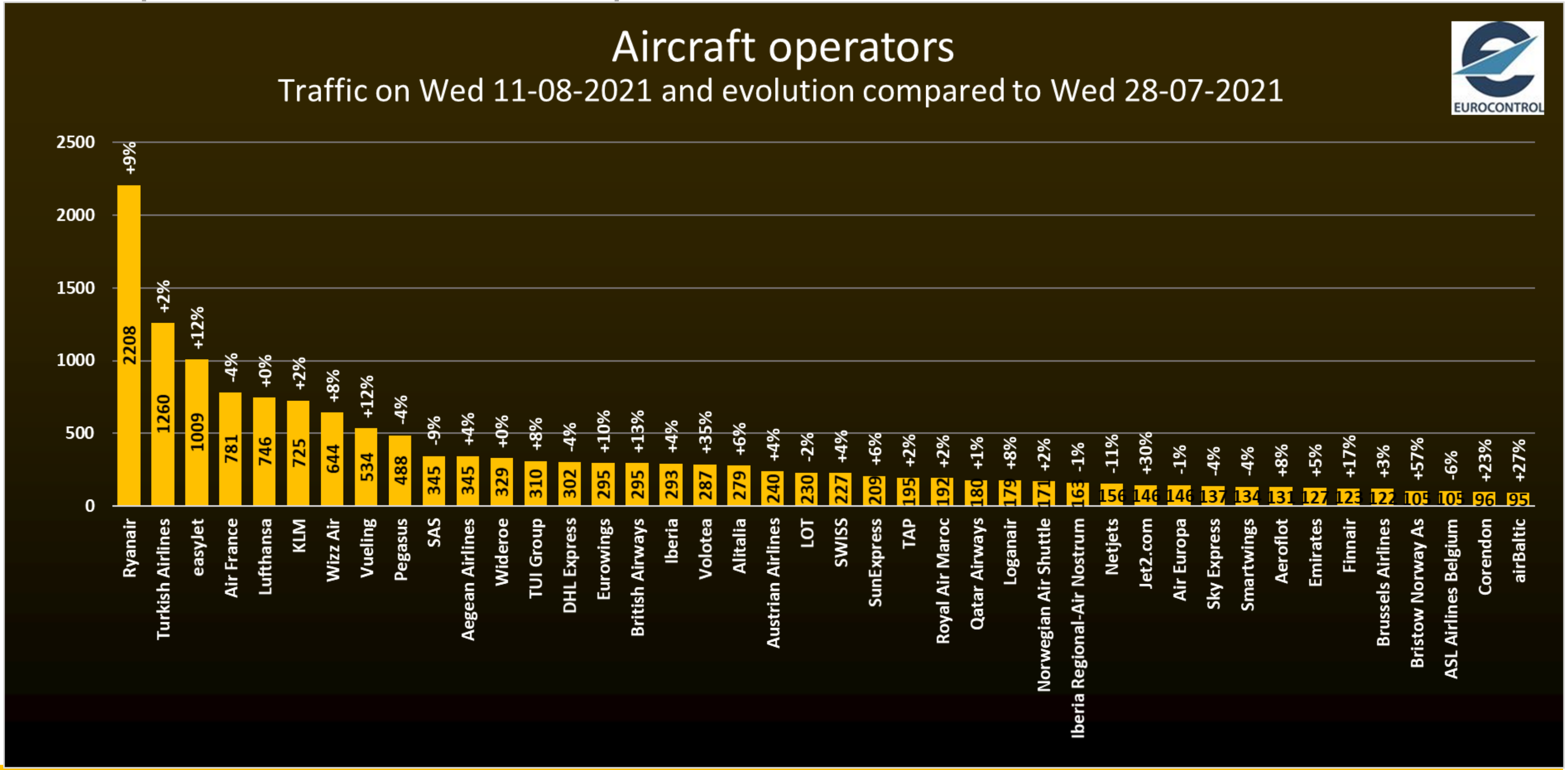
- **Ryanair** (+174 flights; +9%) mainly due to domestic flows in Italy + flows Greece-UK, Germany-Portugal, Italy-Spain and Portugal-UK.
- **easyJet** (+109 flights; +12%) mainly due to flows between UK and Greece, Croatia, Italy, Portugal, Spain and Cyprus.
- **Vueling** (+56 flights; +12%) mainly due to domestic flows in Spain + flows between Spain and Italy and France.

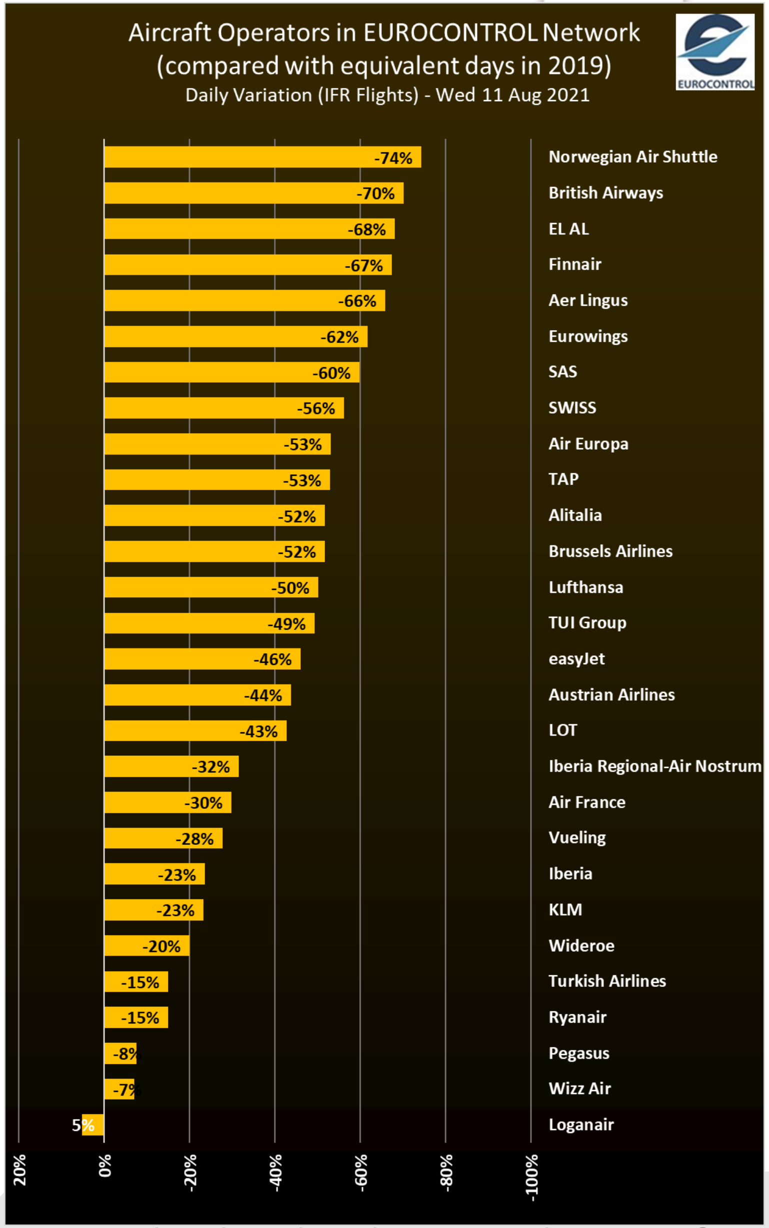
Pegasus (-8%) and **Wizz Air** (-7%) have now caught up with 2019 flight volumes.

Increase in the ranking for Vueling.

Aircraft operators (Daily flights)

Top 40 – Latest operations





- Highest increase for **Ryanair** (+9%), **easyJet** (+12%), **Volotea** (+35%), **Vueling** (+12%), and **Wizz Air** (+8%).
- Ryanair 1st, easyJet 3rd, Wizz Air 7th, British Airways 16th, Air France 4th, Lufthansa 5th.
- Traffic levels ranging from -74% (Norwegian Air Shuttle) to +5% (Logan Air) vs 2019.

Aircraft operators

Latest news

European airlines

- **Aer Lingus** reports it is operating 109 weekly Ireland/UK frequencies following amendments to travel restrictions; launching services to Toulouse and Bordeaux; enters 10 year franchise agreement with Emerald Airlines for the operation of regional services; has been given an aircraft operator license from UK CAA for Aer Lingus (UK).
- **Air France** reports passengers H1 2021 -34.5% on 2020; to start taking delivery of 60 A220-300s from September, to replace A318s and A319s; announces 6 new routes for winter 2021/22.
- **Air France/KLM** report 1.9B€ operating loss in H1 2021.
- **British Airways** adding substantial numbers of seats and routes to US and EU from UK following changes to quarantine restrictions; resuming Hong Kong service from 16 August.
- **Brussels Airlines** reports H1 2021 passengers down 57% on H1 2019.
- **Croatia Airlines** reports 20M€ loss in H1 2021.
- **Czech airlines** cancels order for 8 aircraft on order from Airbus.
- **Condor** to purchase 7 A330neo and lease 9 more.
- **Finnair** reports passengers up 61.6% in July 2021 compared to July 2020.
- **Finnair** reports July passengers down 85% on July 2019.
- **IAG** reporting passenger numbers -85.5% down in H1 2021 compared to 2019, operates 20.8% of 2019 capacity.
- **KLM** reporting passengers -45.6% in H1 2021 compared to 2020; says network end of H1 2021 is 159 destinations compared to 162 at the end of H1 2019.
- **Lufthansa** targeting capacity of 60-70% of pre-pandemic levels by the end of the year, currently operating at ~55%; reports July passengers down 82% on July 2019.
- **Lufthansa Group** reports net loss of 1.8B€ for H1 2021; available liquidity 11.1B€ at the end of H12021; total debt 10.4B€.
- **Norwegian** reported July had the highest number of pax bookings since March 2020.
- **Ryanair** opens a base in Zagreb and plans to deliver 60 weekly frequencies on 24 routes; reports operating loss of €304.5 million for the 3 months to the end of June; expects to reach 10 million passengers in August; to operate 173 weekly flights from Marseille to 57 destinations; to operate 211 weekly flights from Paris Beauvais to 58 destinations; announces July passengers down 35% compared to July 2019; launches 6 services from Shannon for winter season.
- **SAS** reports passengers up 53% in July 2021 compared to July 2020.
- **Swiss** reports H1 2021 passengers down 67.5% on H1 2019.
- **Transavia** expanded fleet by 9 aircraft in H1 2021.
- **TUI Netherlands** suspends services from the Netherlands to the Canaries and Balearics.
- **Turkish Airlines** reports loss of USD 1M in H1 2021; expecting to reach 80% of 2019 capacity in Q3; planning 17 new international destinations.
- **Volaris** puts in order for 2 A320neo.
- **Wizz Air** starts operations from Naples Chapodichino airport, it's 6th base in Italy; opened new base at Rome Fiumicino offering 32 services; handles 3 million passengers in July; signs new 5-year agreement with CEO Varadi; announces plans to recruit 4,600 new pilots by 2030.

Worldwide airlines

- **Air Canada** records an operating loss for Q2 of $908 m and a net loss of $934 million; launches offering of $2.75 billion Senior Secured Notes.
- **American Airlines** Q2 pax down 20.6% to 44.0 million compared to 2019 but with an operating profit of $441 million; expects to fly this summer >90% of domestic seat capacity and 80% of international seat capacity; reporting jet fuel delivery delays across the US.
- **Qatar Airways** CEO states there is a small possibility that they will operate A380s in the future but not more than 5.
- **United Airlines** reports an operating loss of $270 million for Q2 2021.

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 11-08-2021				
→	Spain	3840	↘ -10	-0%	↘ -29%
→	Germany	3776	↗ +102	+3%	↘ -39%
→	France	3246	↘ -201	-6%	↘ -29%
↗	United Kingdom	3018	↗ +322	+12%	↘ -54%
→	Italy	2967	↗ +161	+6%	↘ -29%
↘	Turkey	2898	↗ +24	+1%	↘ -21%
→	Greece	1990	↗ +124	+7%	↘ -11%
→	Netherlands	1273	↗ +40	+3%	↘ -31%
→	Norway	1106	↗ +78	+8%	↘ -34%
→	Poland	882	↘ -13	-1%	↘ -32%

Highest increase over two weeks for:

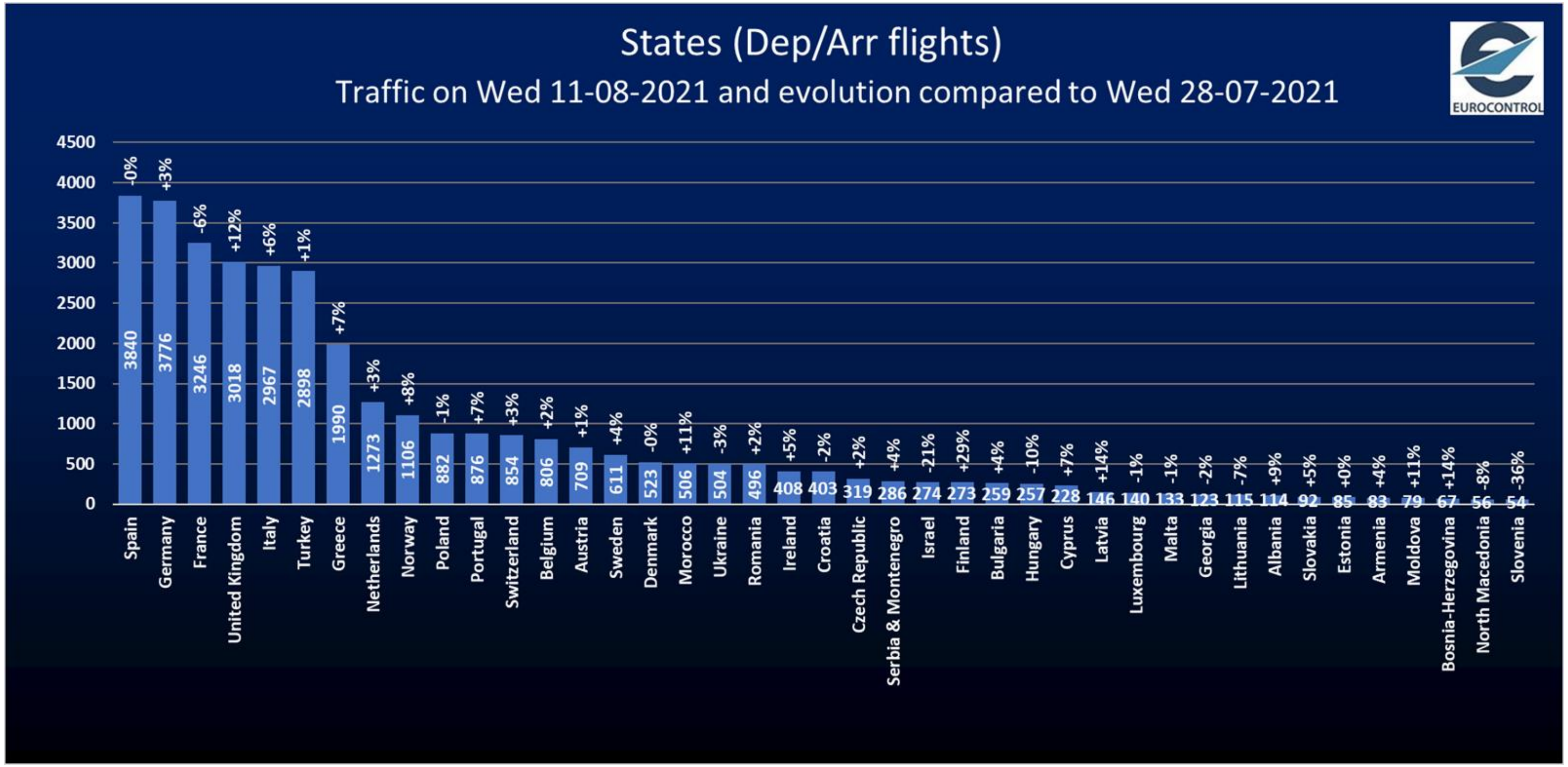
- **United Kingdom** (+322 flights; +12%) mainly driven by light aircraft operators, easyJet, Ryanair, BA, Loganair, Jet2.com and Wizz Air. Mainly domestic flows and flows with Greece, Italy, Germany, France, Cyprus, Spain and Portugal.
- **Italy** (+161 flights; +6%) mainly due to Ryanair and Volotea. Flows with Spain, Greece, Italy and the UK.
- **Greece** (+124 flights; +7%) mainly due to Ryanair and Volotea. Flows with UK, Italy, Greece and France.

Decrease for **France** (-201 flights; -6%) mainly due to light aircraft operators and Air France on domestic flows.

Increase in the **ranking** over 2 weeks for the **UK**.

States (Daily Departure/Arrival flights)

Latest traffic situation



- Strong increases for UK (+12% over 2 weeks), Italy (+6%), Greece (+7%), Germany (+3%), Norway (+8%), Portugal (+7%), Finland (+29%), Morocco (+11%) and Netherlands (+3%).
- Traffic levels ranging from -58% (Finland) to +25% (Albania), compared to 2019.

Associations, Authorities, Industry and States

- **ACI World** releases new tool to assist airports in terminal planning as they increase capacity.
- **European Commission** sets the winter slots use threshold at 50%, a move welcomed by **ACI Europe** and criticised by **IATA**.
- **OAG** reports global capacity is 36% below 2019 level.
- **UK CAA** becomes UK space regulator.

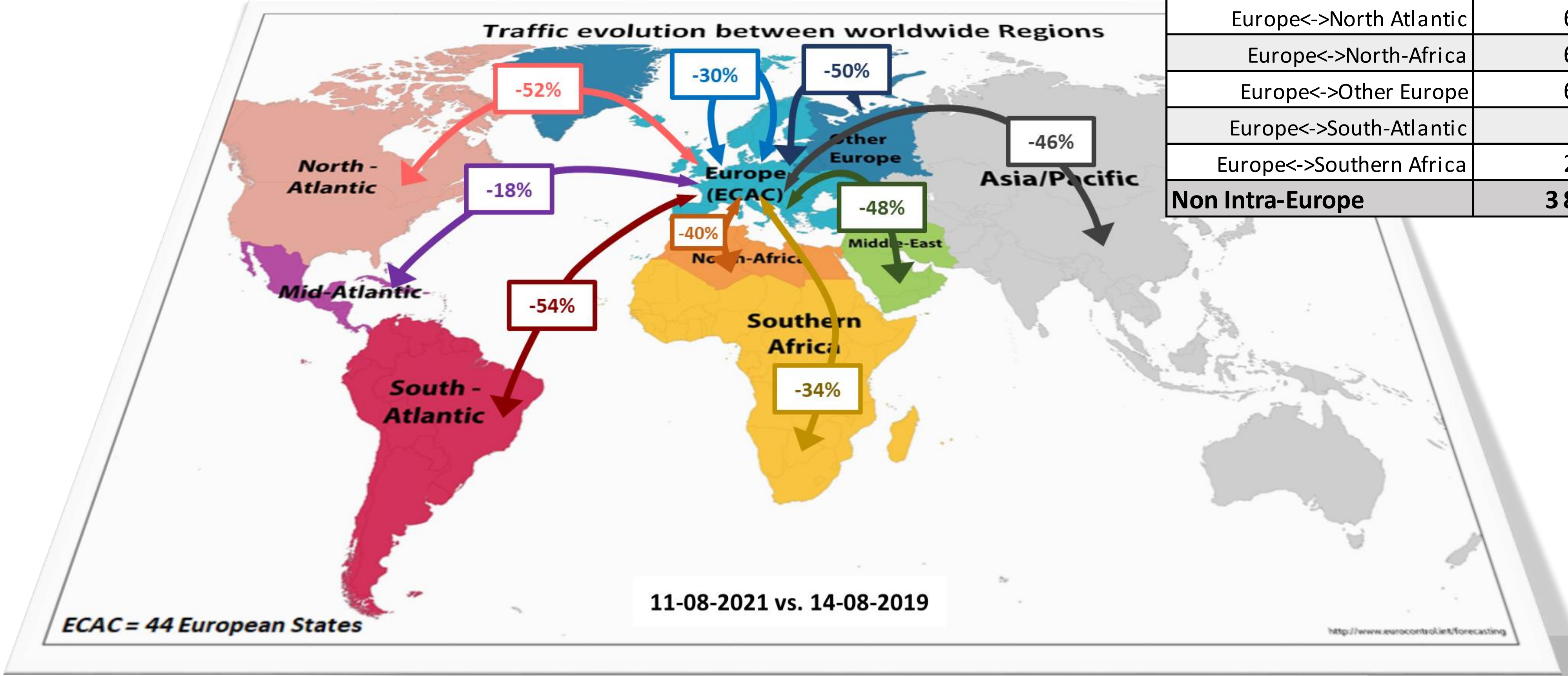
- **Airbus** delivers first A350 from its widebody completion and delivery centre in China; studying freighter variant of A350; reports delivering 47 aircraft in total in July.
- **Airbus** made 297 deliveries in H1 2021 and received 38 orders, reports 2.2B€ net profit.
- **Boeing reports** H1 2021 operating profit of $940 million (H1 2020: op. loss of $4.3 billion); since November 2020 has delivered >130 737 MAX aircraft and >190 grounded ones have returned to service.
- **Embraer** reports deliveries in Q2 2021 of 14 commercial and 20 executive jets; outstanding commercial jet orders comprised $15.9 billion (306 aircraft), 12% more than at the end of Q1.

- **Russia** allocates €2.3 billion in funding for the procurement of aviation equipment, including ANS.

Traffic flows (Daily Departure/Arrival flights)

- The main traffic flow is the intra-Europe flow with 19,025 flights on Wednesday 11 August, which is increasing (+2%) over 2 weeks.
- Intra-Europe flights are at -30% compared to 2019 while intercontinental flows are at -47%.

REGION	28-07-2021	11-08-2021	%	vs. 2019
Intra-Europe	**18 640**	**19 025**	**+2%**	**-30%**
Europe<->Asia/Pacific	471	449	-5%	-46%
Europe<->Mid-Atlantic	131	135	+3%	-18%
Europe<->Middle-East	989	918	-7%	-48%
Europe<->North Atlantic	612	669	+9%	-52%
Europe<->North-Africa	669	699	+4%	-40%
Europe<->Other Europe	635	659	+4%	-50%
Europe<->South-Atlantic	97	88	-9%	-54%
Europe<->Southern Africa	226	209	-8%	-34%
Non Intra-Europe	**3 830**	**3 826**	**-0%**	**-47%**



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 11-08-2021				
→	Spain <-> Spain	1183	↘ -62	-5%	↘ -12%
↗	Turkey <-> Turkey	955	↘ -30	-3%	↘ -6%
↗	Italy <-> Italy	908	↗ +17	+2%	↗ +6%
↘	France <-> France	854	↘ -175	-17%	↘ -5%
→	Norway <-> Norway	786	↗ +57	+8%	↘ -12%
→	United Kingdom <-> United Kingdo	732	↗ +55	+8%	↘ -34%
→	Germany <-> Germany	588	↗ +30	+5%	↘ -41%
↗	Spain <-> United Kingdom	490	↗ +26	+6%	↘ -47%
↘	Germany <-> Spain	449	↘ -28	-6%	↘ -28%
→	Greece <-> Greece	416	↗ +12	+3%	↘ -12%

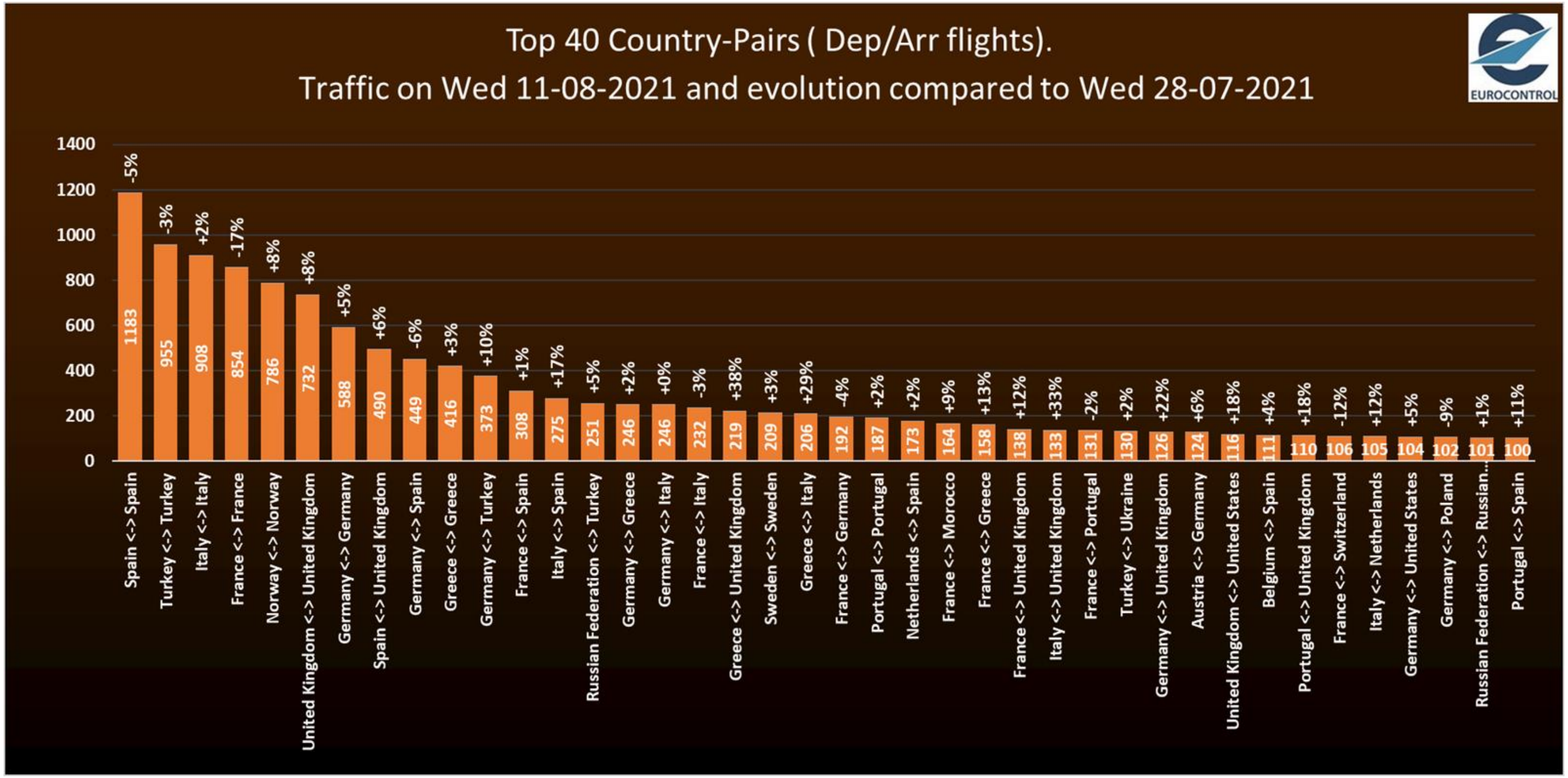
- 8 of the top 10 flows are domestic.
- **Highest increases** for:

  Norway-Norway (+57 flights; +8%) owing to light aircraft operators and Bristow Norway.

  UK-UK (+55 flights; +8%) owing to light aircraft operators and Logan Air.
- **Highest decrease** for **France-France** (-175 flights; -17%) mainly due to light aircraft operators and Air France.
- Domestic Italy are now above pre-COVID levels (2019) while domestic France and Turkey are very close.

Country pairs (Daily Departure/Arrival flights)

Latest traffic situation

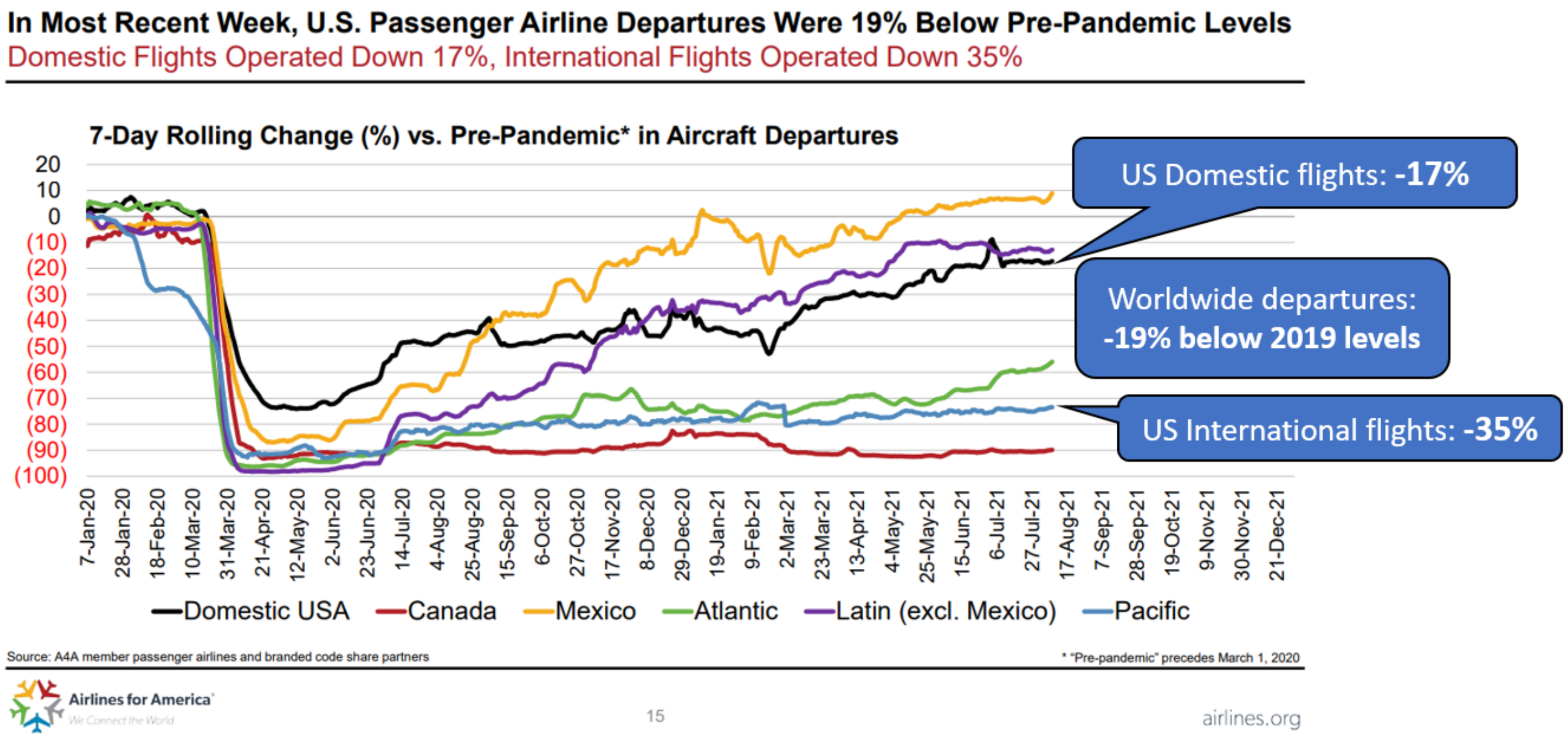


- Flows recording the biggest increases over two weeks:
  - **Greece-UK** (+38%) owing to **Jet2.com**, **Ryanair, easyJet**, **British Airways** and **TUI Airways (UK)**.
  - **Greece-Italy** (+29%) thanks to **Volotea**.
  - **Italy-Spain** (+17%) mainly due to **Vueling**, **Ryanair** and **Alitalia**.
- Flows recording the biggest decrease over two weeks:
  - **France-France** (-17%) mainly due to light aircraft operators and Air France.

Outside Europe

USA

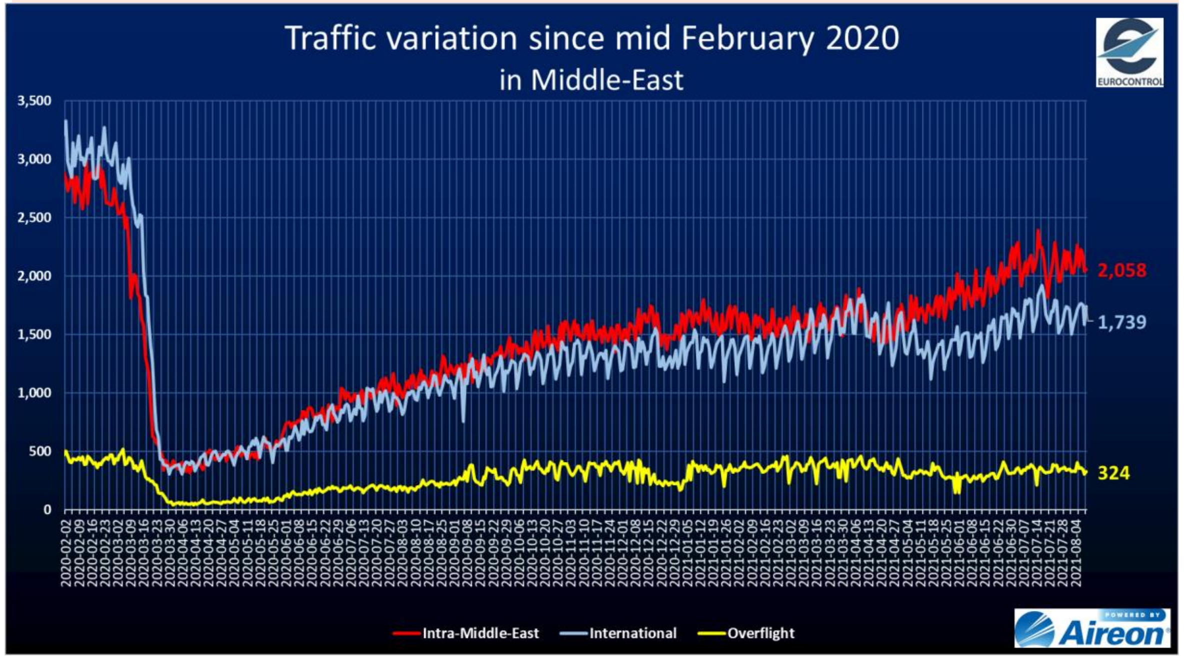
- Bookings are improving but demand for corporate and long-haul international air travel are lagging, so revenues remain well below 2019 levels and industry cash burn continues.
- On 10 August, US passenger airline departures were 19% below 2019 levels with domestic down 17% and international down 35%.
- The domestic US load factor of 89% has returned to pre-pandemic levels.
- In most recent week, average airfares on tickets sold were 14% below pre-pandemic levels owing mainly to dearth of business and long-haul international travel.



Outside Europe

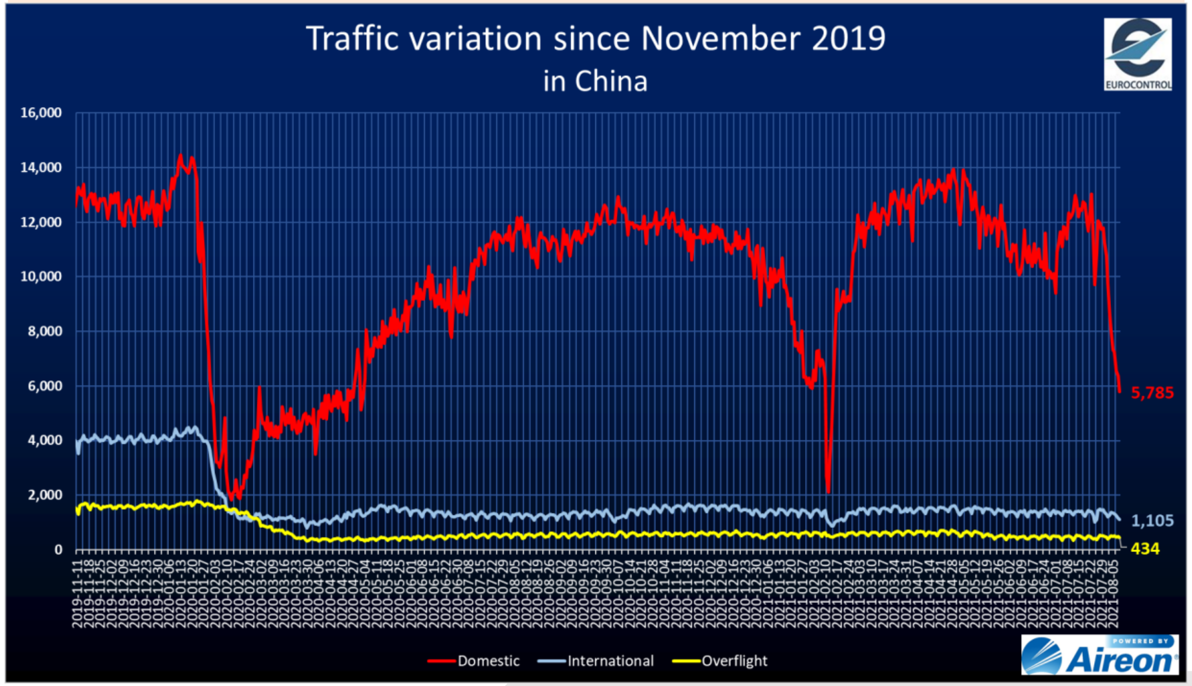
Middle East

- On 10 August Intra-Middle-East traffic recorded 2,058 flights (-26% compared to Feb 2020).
- International traffic from and to Middle-East recorded 1,739 flights (-43% compared to Feb 2020).
- Overflights recorded 324 flights (-24% compared to Feb 2020).



China

- In the wake of rising cases of the Delta variant across China in August, tightened travel restrictions have resulted in domestic flights decreasing by -51% (5,785 flights) on 9 August compared to January 2020 levels.
- International flights also impacted by the outbreak, recorded 1,105 flights (-73%) compared to 1 Jan 2020. Overflights remain suppressed with 434 flights (-73%).



Airports (Daily Departure/Arrival flights)

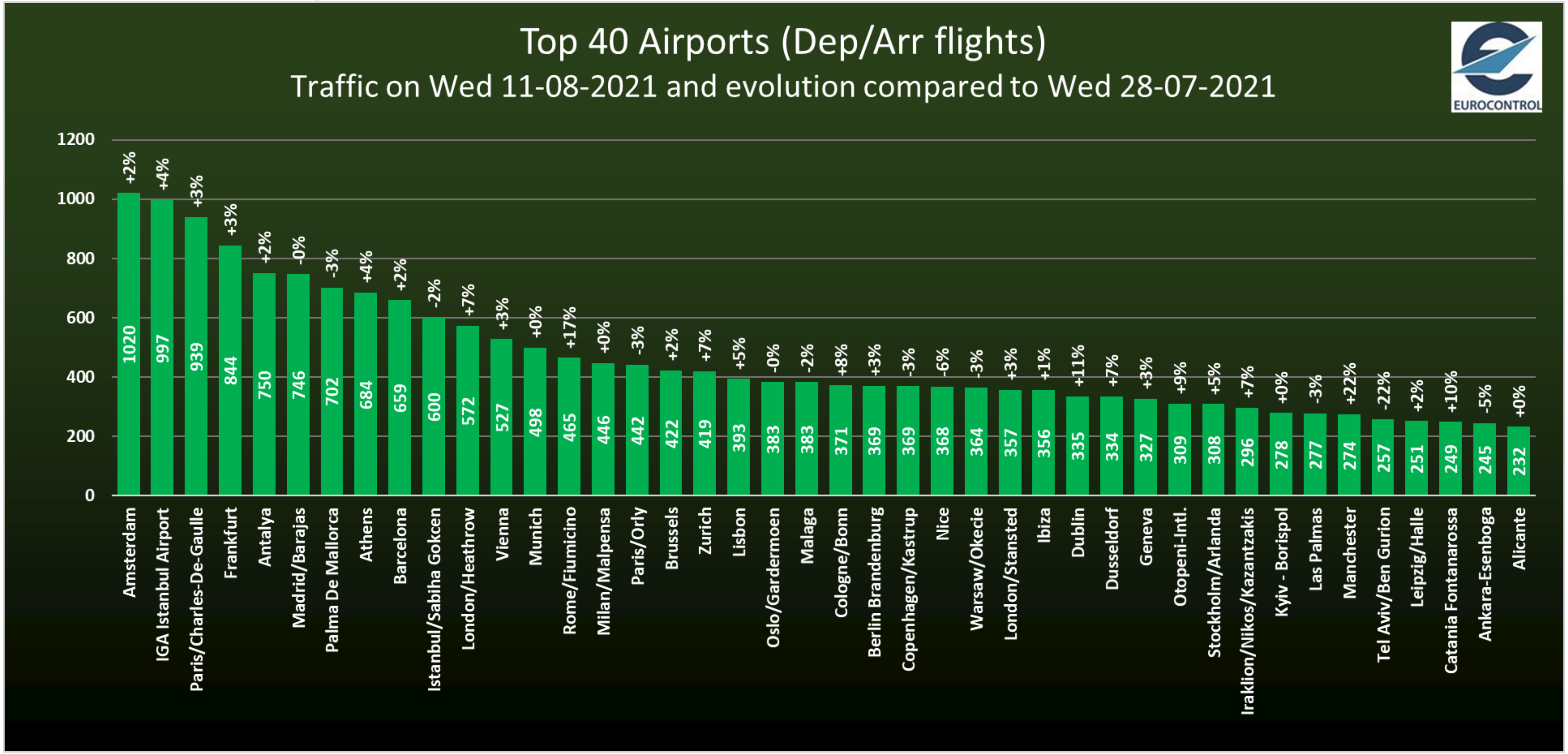
Top 10 and latest news

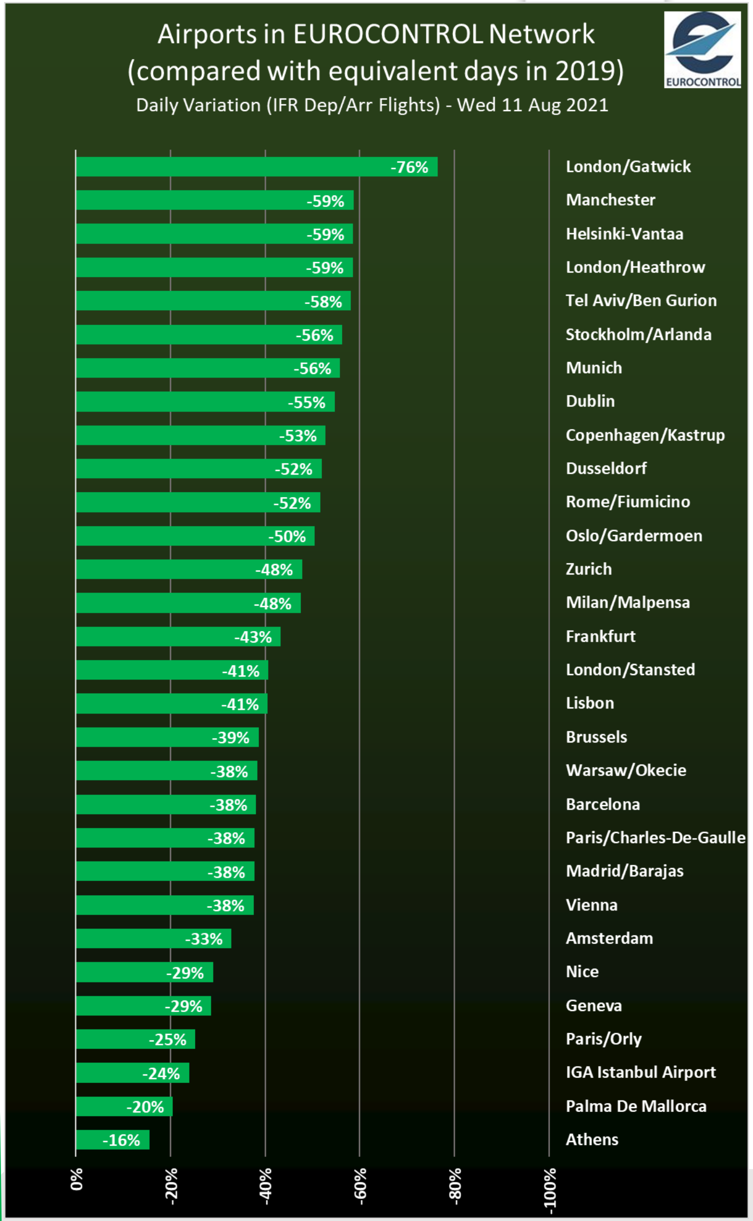
Rank evolution over 2 weeks	Airport	Dep/Arr Flights	Δ over 2 weeks	% over 2 weeks	% vs 2019
Top 10 Airports on Wed 11-08-2021					
→	Amsterdam	1020	↗ +22	+2%	↘ -33%
→	IGA Istanbul Airport	997	↗ +41	+4%	↘ -24%
→	Paris/Charles-De-Gaulle	939	↗ +30	+3%	↘ -38%
→	Frankfurt	844	↗ +25	+3%	↘ -43%
↗	Antalya	750	↗ +13	+2%	↘ -25%
↘	Madrid/Barajas	746	↘ -2	-0%	↘ -38%
→	Palma De Mallorca	702	↘ -24	-3%	↘ -20%
→	Athens	684	↗ +26	+4%	↘ -16%
→	Barcelona	659	↗ +12	+2%	↘ -38%
→	Istanbul/Sabiha Gokcen	600	↘ -10	-2%	↘ -12%

- Positive change for Antalya over last 2 weeks.
- Highest increases in flights for:
  - **IGA Istanbul** (+41 flights; +4%) due to Turkish Airlines and domestic flows.
  - **Paris CDG** (+30 flights; +3%).
  - **Athens** (+36 flights; +4%) de to light aircraft operators and flows to Greece, UK and France.
  - **Frankfurt** (25 flights; +3%).
- Decrease for:
  - **Palma de Mallorca** (-24 flights; -3%) mainly due to flows to UK, Denmark and Spain.

Airports (Daily Departure/Arrival flights)

Latest operations





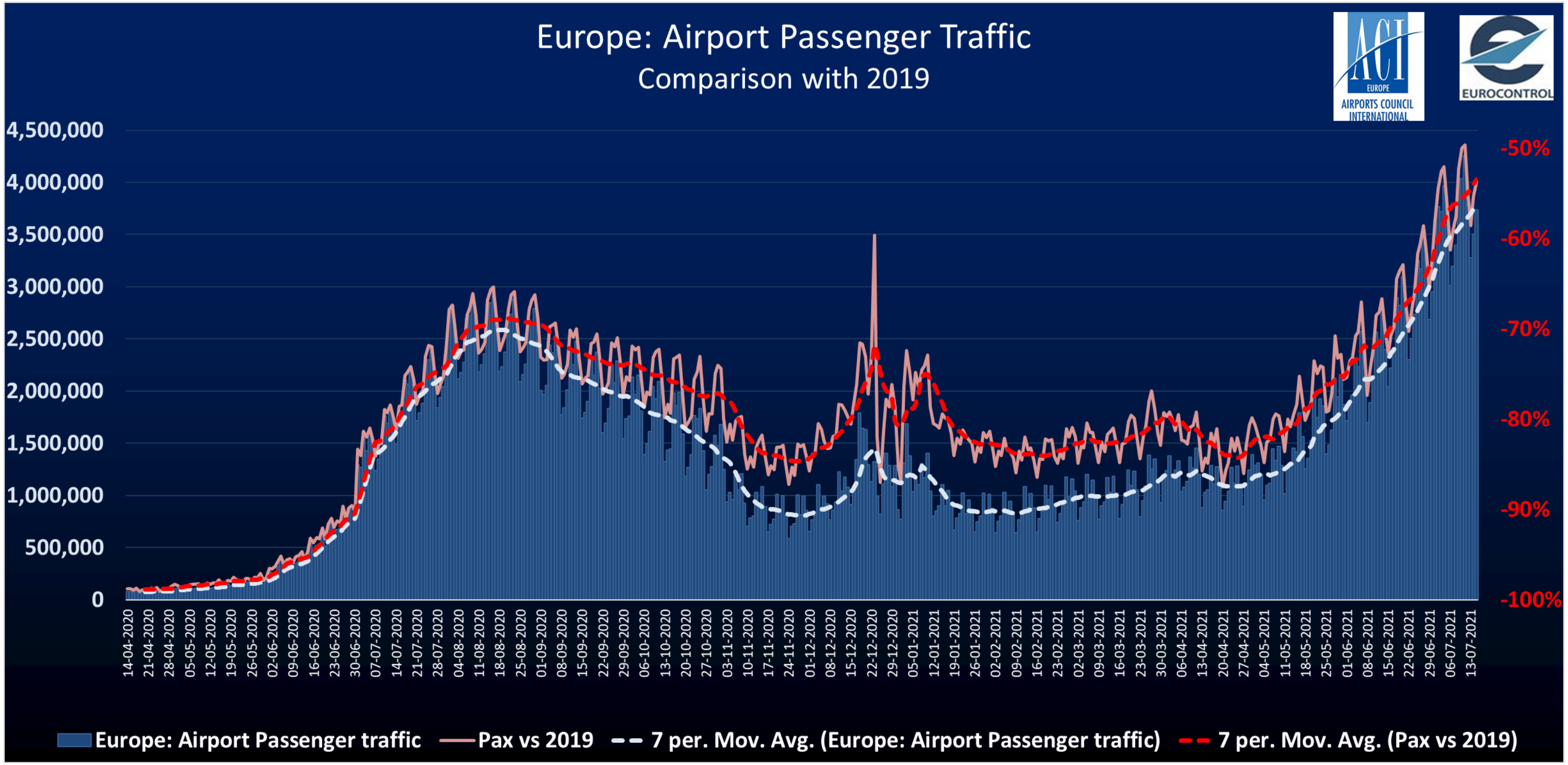
- Largest increase in flights for **Rome/Fiumicino** over 2 weeks (+66 flights; +17%), **Manchester** (+50; +22%), **London/Luton** (+42; +23%), **IGA Istanbul** (+41; +4%), **London/Gatwick** (+40; +23%), **Helsinki** (+37; +19%) and **London/Heathrow** (+36; +7%).
- Traffic levels ranging from -76% (Gatwick) to -16% (Athens) compared to 2019.

Airports

Latest news

- **Athens airport** state aid of €110 million approved by European Commission; passengers down 37.8% in July 2021 compared to 2019.
- **DHMI** reports passengers up 14.6% at Istanbul airport from Jan-July 2021 compared to same period in 2020.
- **Dublin airport** reports July 2021 passengers down 81% on July 2019.
- **Groupe ADP** expects its Paris airports to operate in 2021 at 30-40% of 2019 levels and in 2022 at 65-75%.
- **Italian airports'/ground handling operators'** state aid of €800 million approved by European Commission.
- **London Luton** reports July passengers down 84.7% on July 2019.
- **Swedavia** reports passenger numbers across all airports down 62% in July 2021 compared to July 2019.

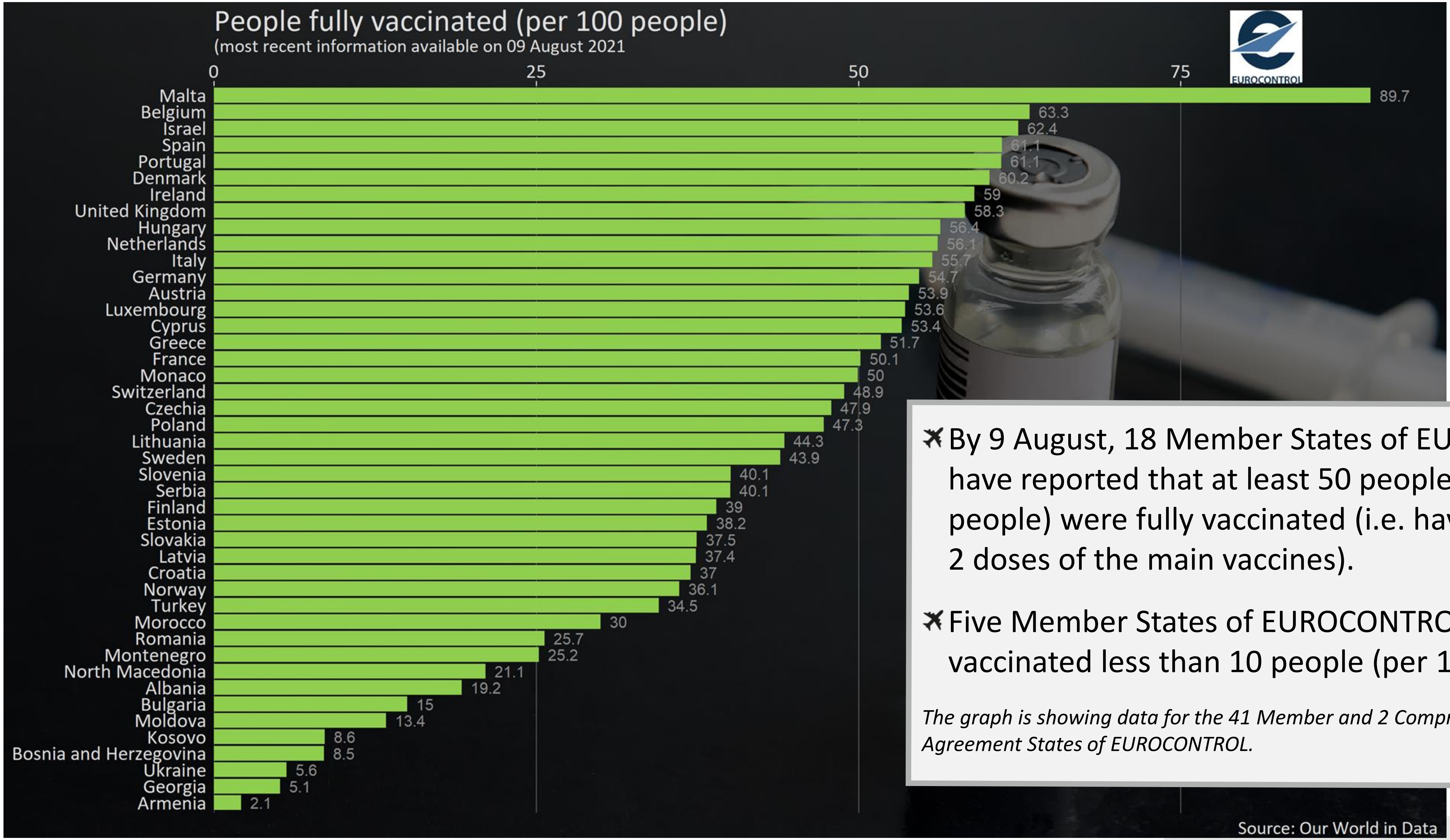
Passengers



ACI recorded 3.7 **million passengers** on 15 July 2021*, a **loss of 4.3 million passengers** compared to the equivalent day in 2019 (i.e. **-54%**).

* Latest available data from ACI

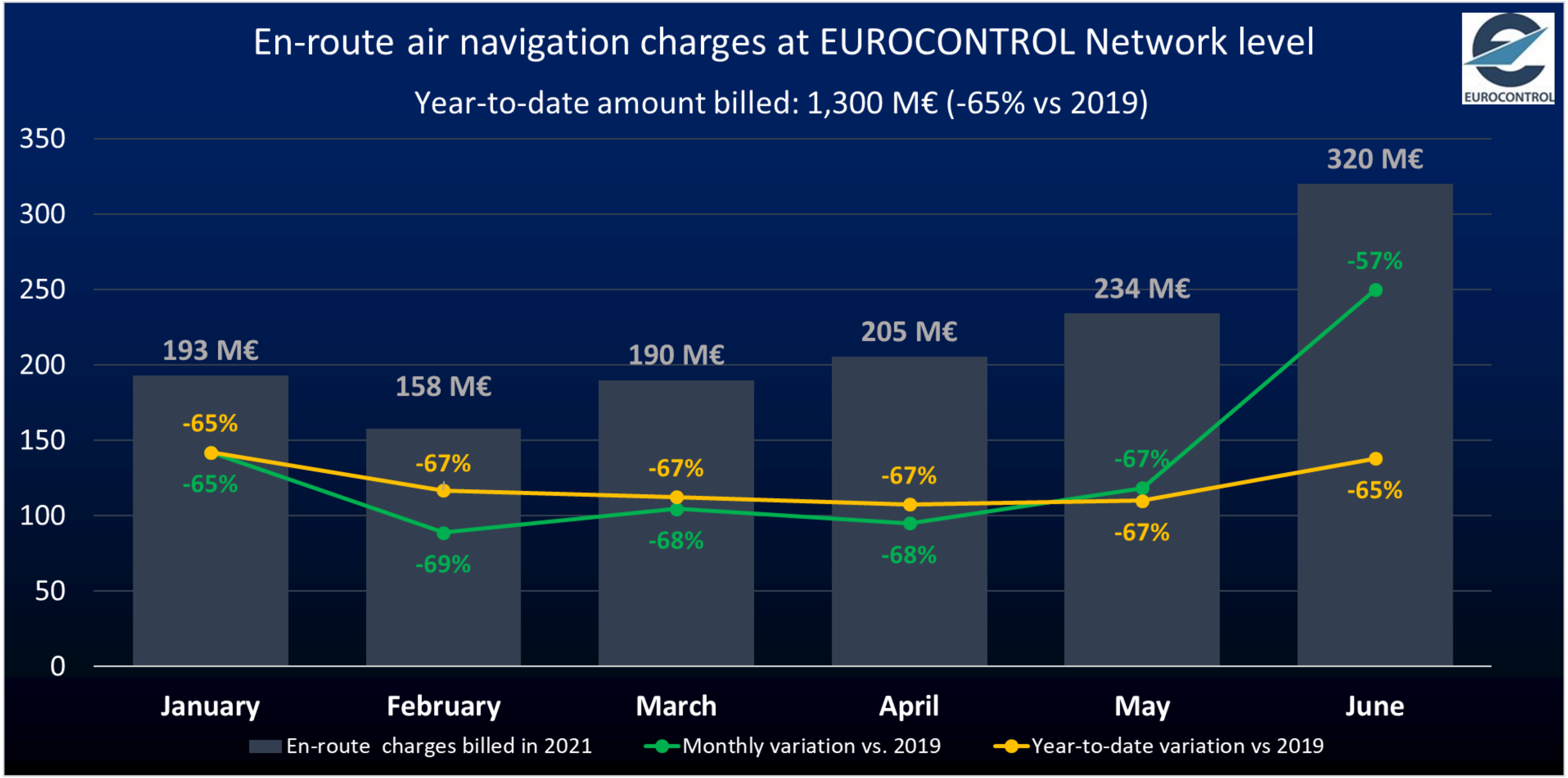
Vaccination updates



- By 9 August, 18 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).
- Five Member States of EUROCONTROL have fully vaccinated less than 10 people (per 100 people).

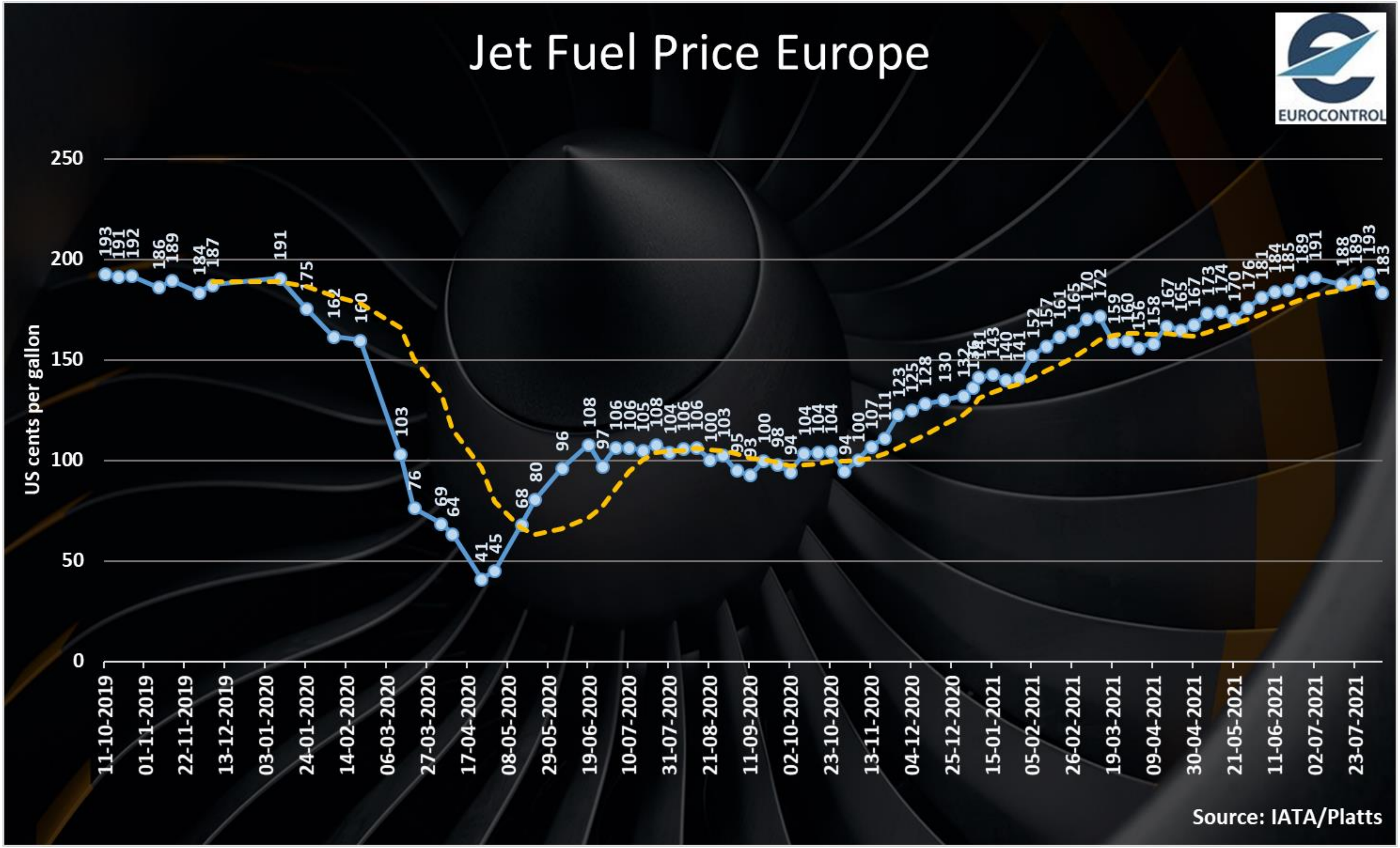
The graph is showing data for the 41 Member and 2 Comprehensive Agreement States of EUROCONTROL.

En-Route Air Navigation charges



- **EUROCONTROL** has billed **320M€** of en-route charges for June flights.
- This is **-57%** below the amount billed for the June 2019 flights.
- On a year-to-date basis, EUROCONTOL billed **1,300M€** which is **-65% vs 2019**

Economics



- **Jet fuel prices** have started to rise since last Autumn, from around 100 cts/gal in October 2020 to **183 cts/gal on 6 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