Tuesday, 10 November 2020

Germany

Loss of flights
-980k (-65%)
Dep/Arr flights vs. 2019
since 1st March

Total economy GDP[2]
-5.3%
2020 vs. 2019

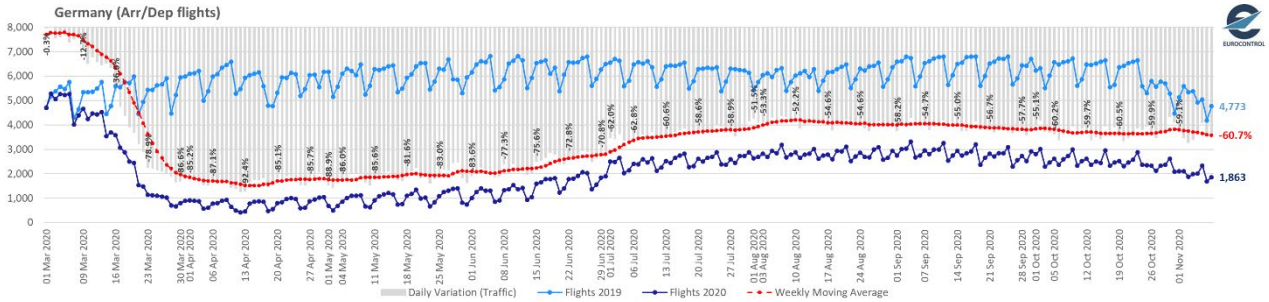
Loss of Passengers[1]
-152M (-83%)
2020 vs. 2019

Total job losses[3]
-585k
At end September

Key facts:

Flights last week vs. 2019:

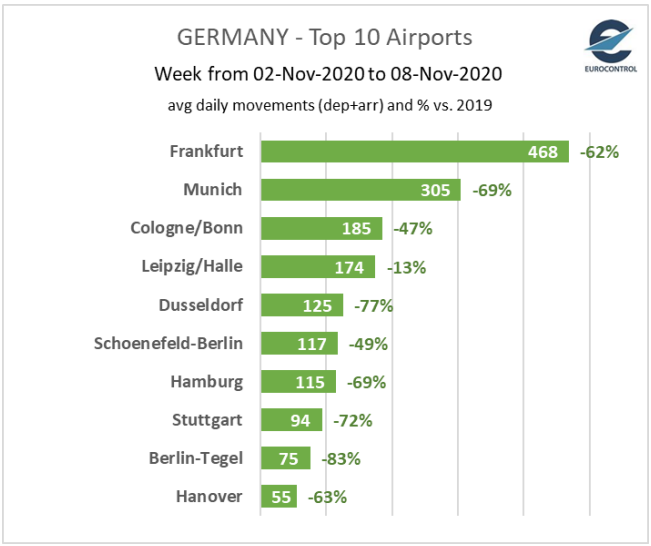
- Frankfurt -62%
- Munich -69%
- Lufthansa -68%
- DHL Express +14%
- Eurowings -80%
- Domestic flows -50%
- European flows -61%

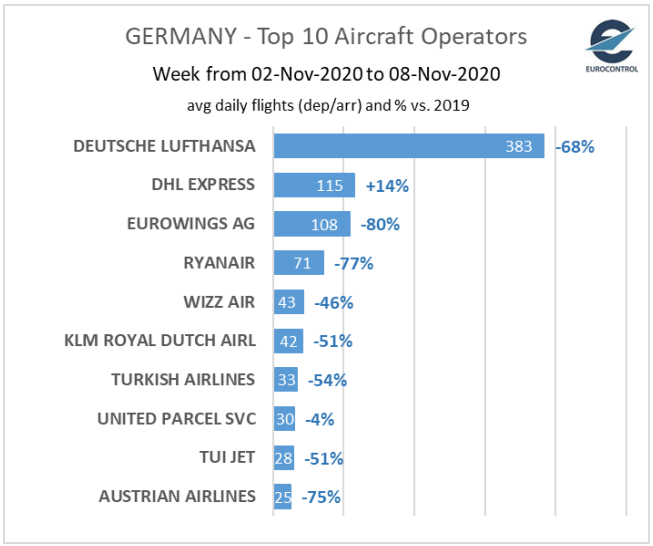


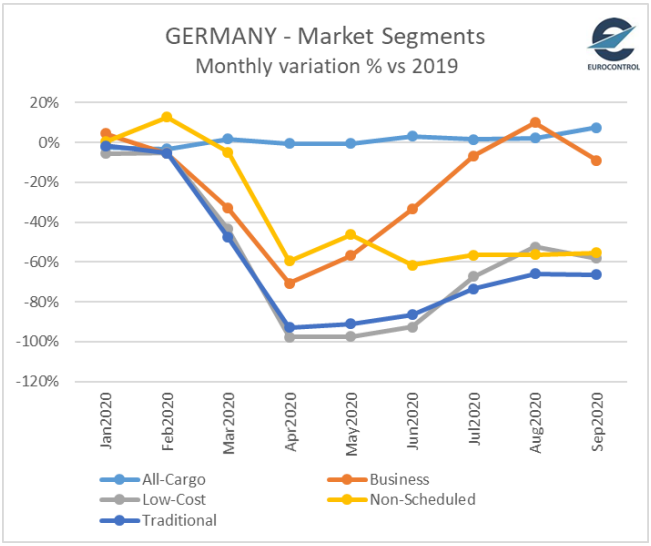
- **COVID Crisis/Economy:** Germany ranks 19th worldwide in terms of COVID deaths[4] and 7th in Europe. Impact on the economy is less severe than in other European States but still significant with an expected GDP decrease in 2020 of -5.3% and 585,000 job losses up to September.
- **Traffic:** Traffic started its decline the first week of March reaching -89% mid-April. From there it started a slow but steady recovery which accelerated in June and July peaking 8 August with 3,178 flights (-53%). Traffic slowly declined since staying between -50 and -60% from August through October. Overall, in terms of traffic loss, Germany ranks 2nd in Europe (after the UK) with -980k flights and -152M passengers lost.
- **Airports:** Frankfurt is the top airport in Germany with 468 average movements per day over the last week (-62% over 2019), with most top airports suffering similar traffic reductions except Leipzig/Halle (only -13%).
- **Aircraft Operators:** Lufthansa remains the top airline operating at -68% last week. DHL Express is second, with an increase of +14%, overtaking Eurowings (-80%) and Ryanair (-77%) in the top three. Lufthansa was the first to ramp up operations in June followed by Eurowings, whereas Ryanair did so later in July.
- **Market segments:** All cargo remained stable. Non-scheduled initially were less affected but did not recover as Traditional or Low Cost, all being at similar levels in September. Business aviation recovered quicker but the situation deteriorated in September.
- **Traffic flows:** Domestic flows remain the top flows (-50% over 2019). UK and Spain complete the top three flows, with the US recovering faster (-40%). Top non-European flows are with North Atlantic and Asia/Pacific.

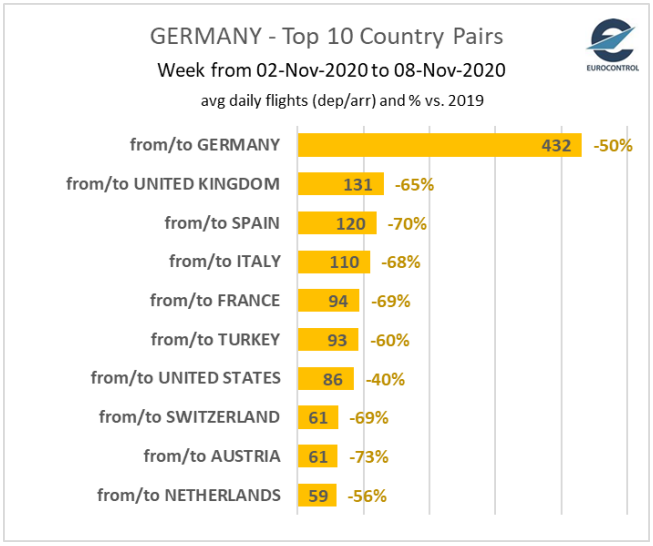
COVID-19 Impact on EUROCONTROL Member States

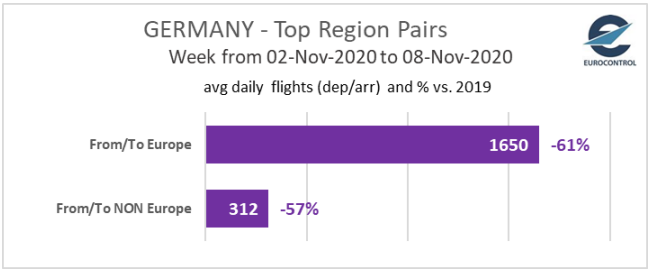
EUROCONTROL Briefing

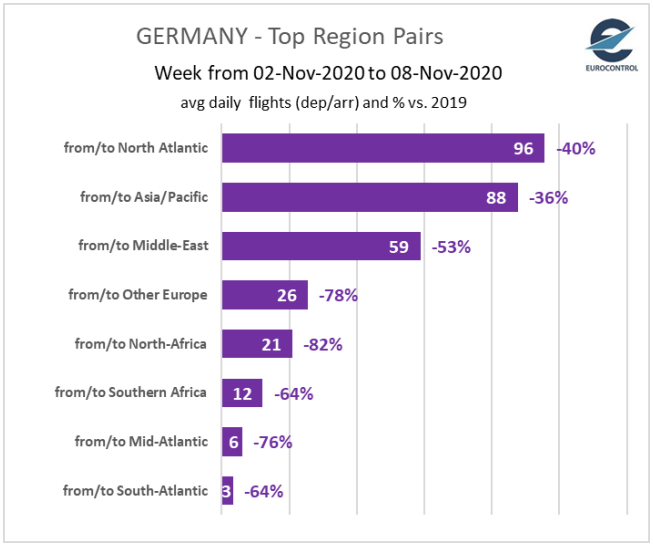












SUPPORTING EUROPEAN AVIATION

Data Sources:

[1] *ACI*

[2] *Oxford Economics (16 October 2020)*

[3] *DESTATIS (29 October 2020)*

[4] *John Hopkins University*

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