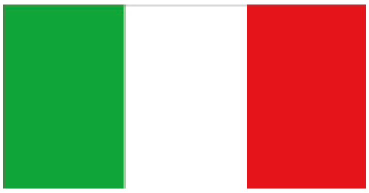
Tuesday, 17 November 2020



Italy

Loss of flights
-700k (-70%)
Dep/Arr flights vs. 2019 since 1st March

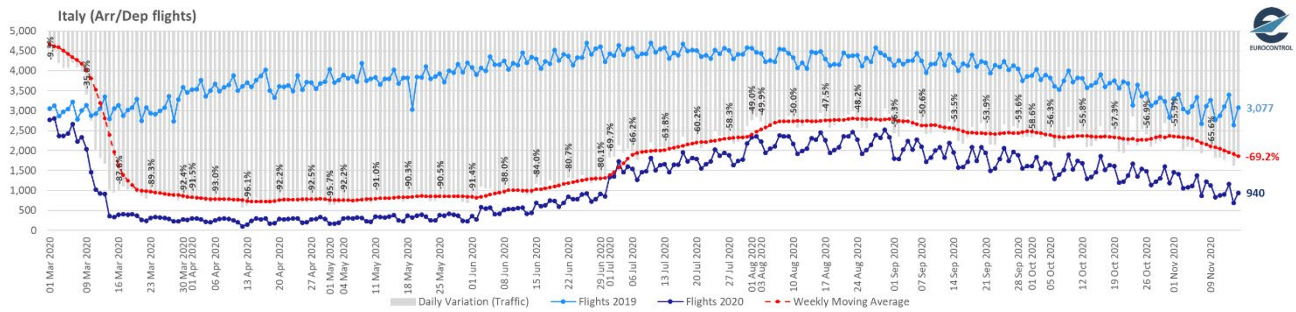
Total economy GDP[2]
-9.8%
2020 vs. 2019

Loss of Passengers[1]
-112M (-83%)
2020 vs. 2019

Total job losses[3]
-387k
At end September

Key facts:
Flights last week vs. 2019:

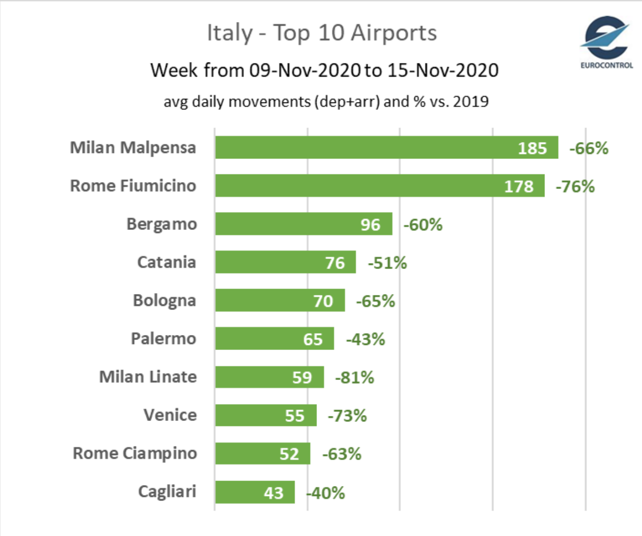
- Milan Malpensa -66%
- Rome Fiumicino -76%
- Ryanair -56%
- Alitalia -78%
- DHL Express +3%
- Domestic flows -46%
- European flows -68%

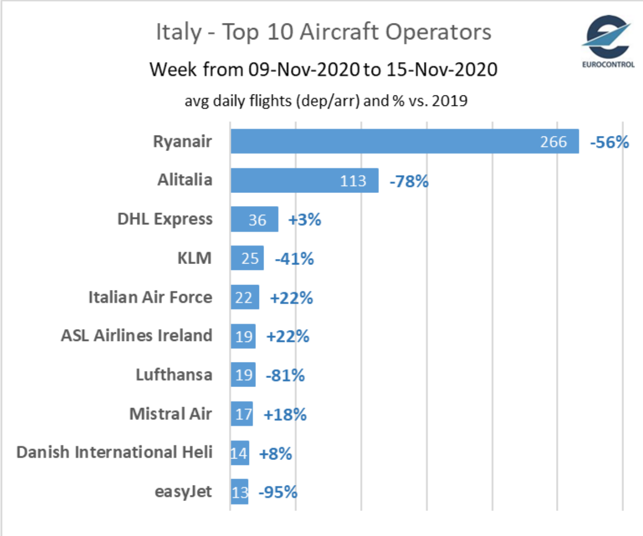


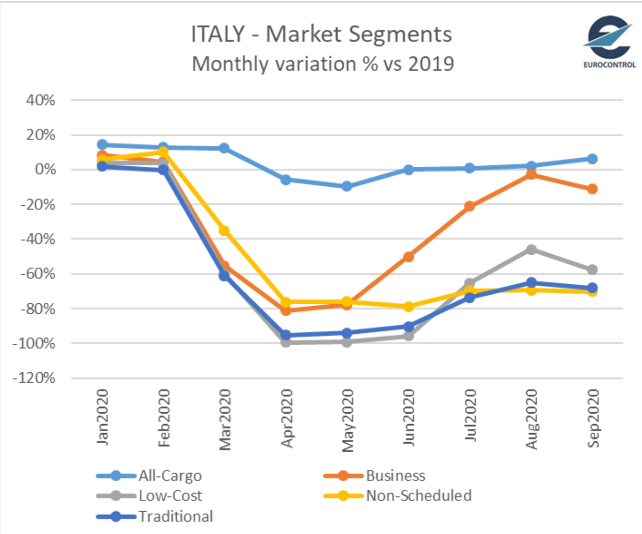
- **COVID Crisis/Economy:** Italy was the first European country to be hit by COVID. It ranks 6th worldwide in terms of COVID deaths[4] and 2nd in Europe (after the UK). The economy has been badly affected with an expected GDP decrease in 2020 of -9.8% and job losses amounting to 387,000 up to September.
- **Traffic:** Traffic started a steep decline the first week of March reaching its nadir at -97% of 2019 the 12 April 2020 and remained under 90% through April-May. Traffic recovered in three distinct steps during the first weeks of June, July and August and, as for most European States, started slowly declining in September through October. The second wave of the pandemic has already shown its effect in the accelerated traffic decline in November. In terms of traffic loss, Italy ranks 5th in Europe with -700k flights and -112M passengers lost.
- **Airports:** Milan Malpensa overtakes Rome Fiumicino as the top airport last week in Italy with 185 average movements per day (-66% over 2019) and 178 movements (-76%) respectively. Airports in the Italian islands are the least affected as domestic and business aviation have performed better than other sectors. Catania and Palermo in Sicily now rank 4th and 6th respectively (8th and 10th last year) and Cagliari in Sardinia is now 10th (15th last year).
- **Aircraft Operators:** Ryanair remains the top airline operating at -56% last week followed by Alitalia (-78%). With a +3% increase, DHL Express climbs to 3rd position from 15th last year. easyJet, 3rd company last year, has practically stopped operations in Italy with a -95% decrease and is now ranked 10th. Military flights gain relevance with the Italian Air Force appearing now as 5th airline with a +22% increase.
- **Market segments:** All cargo remained stable. Non-scheduled initially were less affected than other segments but did not recover throughout. Low-cost managed to recover faster than traditional overtaking them as of July. Business aviation reached 2019 levels in August but the situation slightly deteriorated in September.
- **Traffic flows:** Domestic flows become even more predominant (only -46% over 2019). Flows with Germany and the UK complete the top three. Top non-European flows are with Middle-East and North Africa .

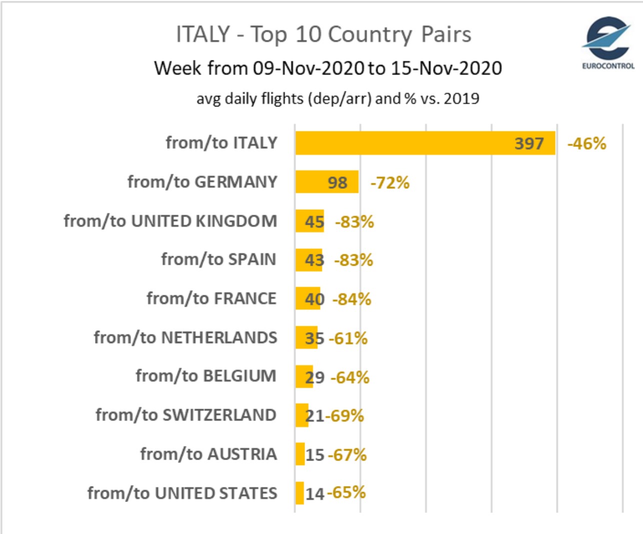
COVID-19 Impact on EUROCONTROL Member States

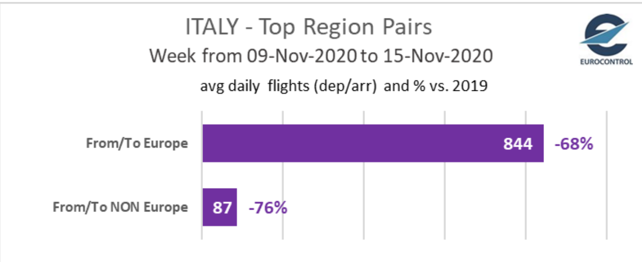
EUROCONTROL Briefing

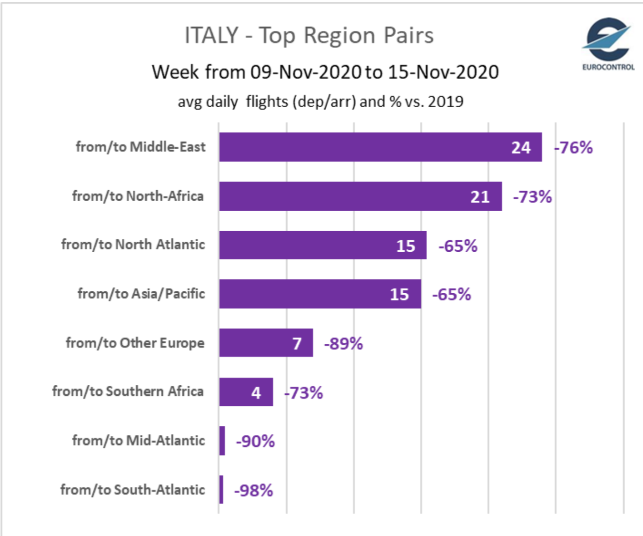












SUPPORTING EUROPEAN AVIATION

Data Sources:

[1] *ACI*

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

[3] *Istituto Nazionale di Statistica*

[4] *John Hopkins University*

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