

BUSINESS AVIATION

TRAFFIC TRACKER EUROPE

March 2021

COVID-19 Edition

**1 YEAR OF
COVID**

**Revisited
edition**

March 2021 – Foreword

The European Business Aviation Association (EBAA) is monitoring developments related to the COVID19 impact on the aviation sector. We work with authorities, and aviation organisations to gather, filter and disseminate official guidance and information to our members, and the broader industry as it becomes available. In this report, we have compiled European Business aviation traffic data and trends for March 2021 (see the February report [here](#)).

IMPORTANT NOTICE:

Until February 2021, it was possible to compare the monthly data and, above all, the impact of COVID19 with the previous year as "normal" monthly traffic data (pre COVID19) were compared with "extraordinary COVID19 data". From March 2021 onwards, many calculations comparing March 2021 and March 2020 would be distorted. The purpose of this report is to show how Business aviation is impacted compared to its normal levels. Consequently, some of the analyses that follow have been adapted and modified to reflect the state of the industry compared to its normal state (pre COVID19). The details of the changes are explained in the charts.

A year ago, COVID19 hit Europe and had a huge impact on aviation. From the historical month of March and April 2020 onwards, Business aviation has been hitting a bumpy recovery road. After a rapid recovery through summer 2020, the industry has (up until now) stabilised around -25% of its normal levels. Some general trends exist; however, the state of the industry remains very disparate depending on the different countries, the different airports and the different routes (and several other factors).

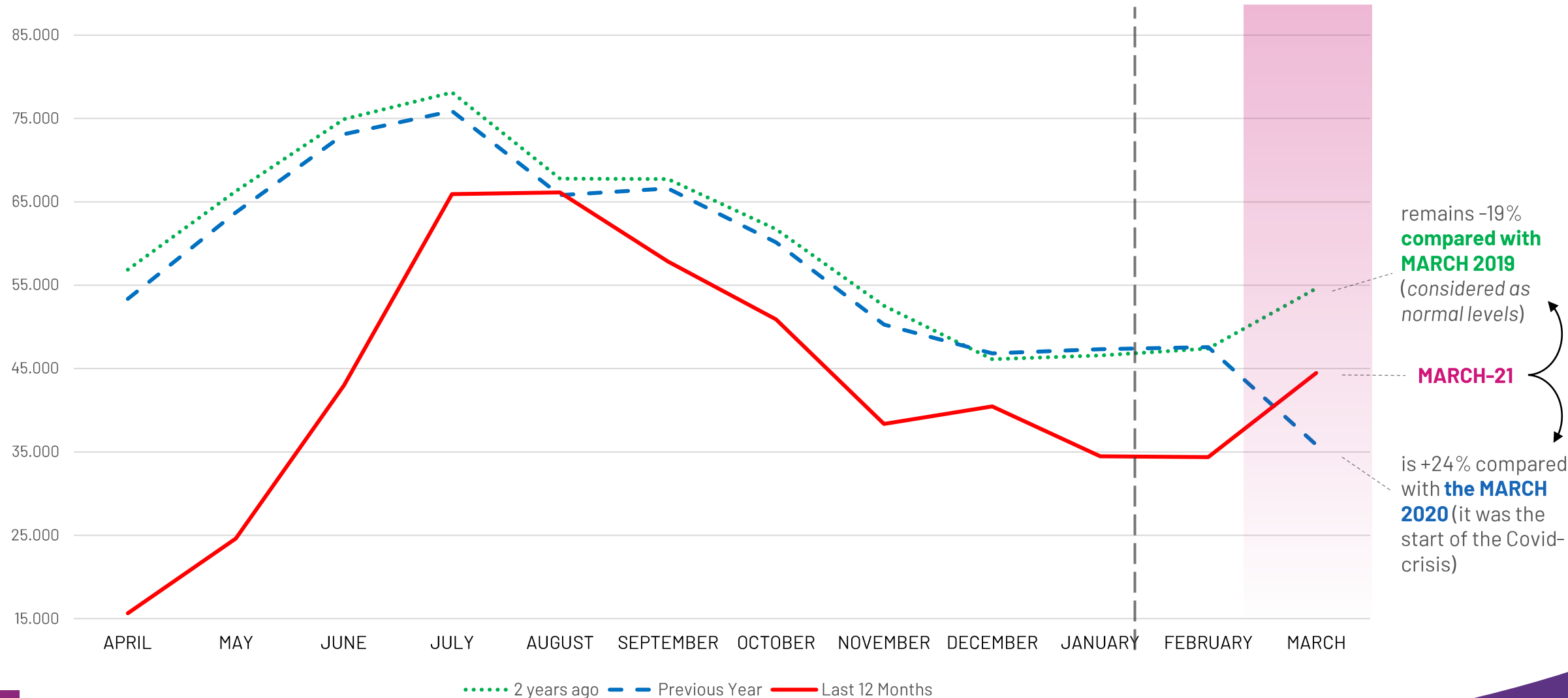
Key learnings

- With the airlines industry still at -73% of its "normal" levels, Business aviation accounts now for 16% of all air transport in Europe.
- March 21 reinforces the trend observed in January and February. **Europe is divided into 2 zones.** In Eastern Europe, Business aviation is "globally" experiencing a positive start of the year (even compared with pre-Covid times). Western Europe (accounting for the biggest business aviation markets) remains the part the most impacted by the pandemic (all markets are in the red but at different levels).
- During the pandemic, Business aviation **is driven by short distance, light airplane, commercial Business aviation.** These new trends, observed since the start of the crisis, remain valid up until now.

This traffic report is made possible thanks to [EUROCONTROL](#) data and the support of [WingX](#). Should you have any questions on this report, please write to Arthur (athomas@ebaa.org).

DEPARTURES, ARRIVALS, INTERNALS AND OVERFLIGHTS (DAIO) REPORT

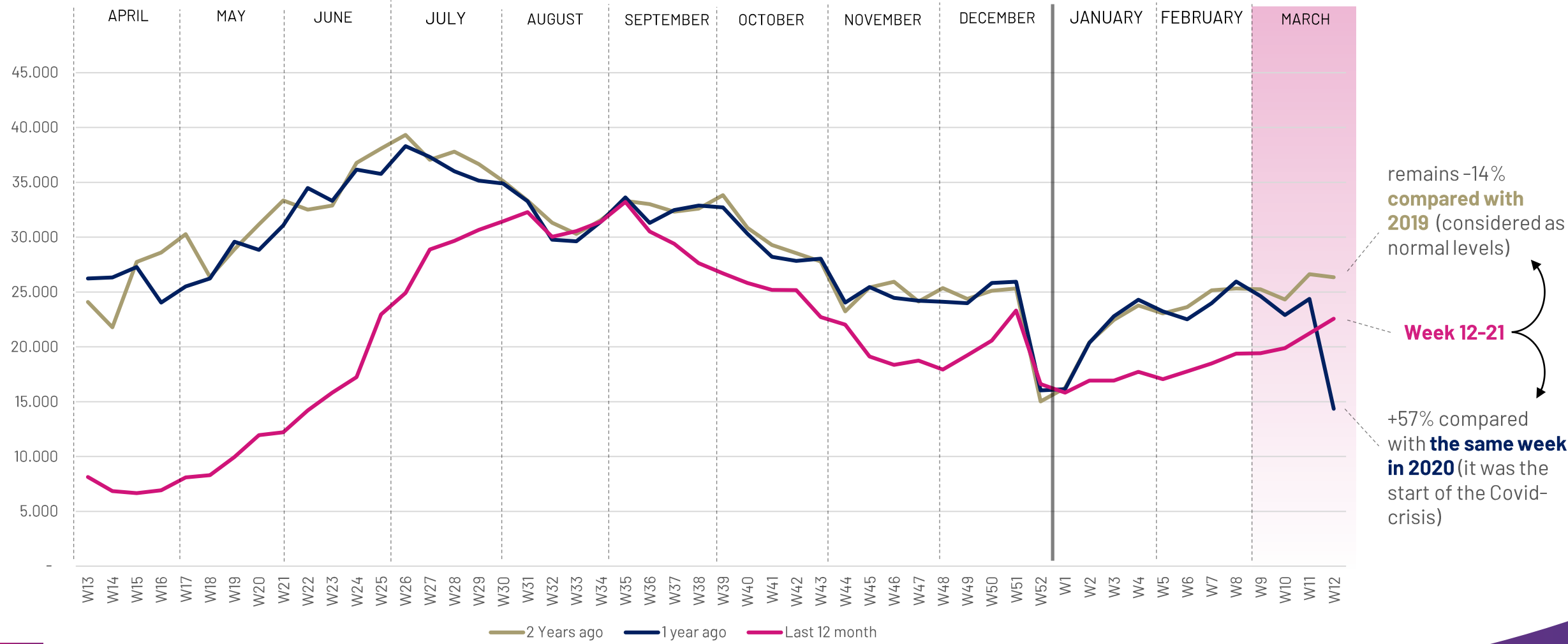
BUSINESS AVIATION FLIGHTS



This report is made possible thanks to EUROCONTROL and WINGX ADVANCE

BUSINESS AVIATION ACTIVITY THROUGHOUT THE COVID CRISIS

WEEK BY WEEK DETAILS IN EUROPE (DEPARTURES + ARRIVALS)



DEPARTURES, ARRIVALS, INTERNALS AND OVERFLIGHTS (DAIO) REPORT

TOTAL BUSINESS AVIATION FLIGHTS

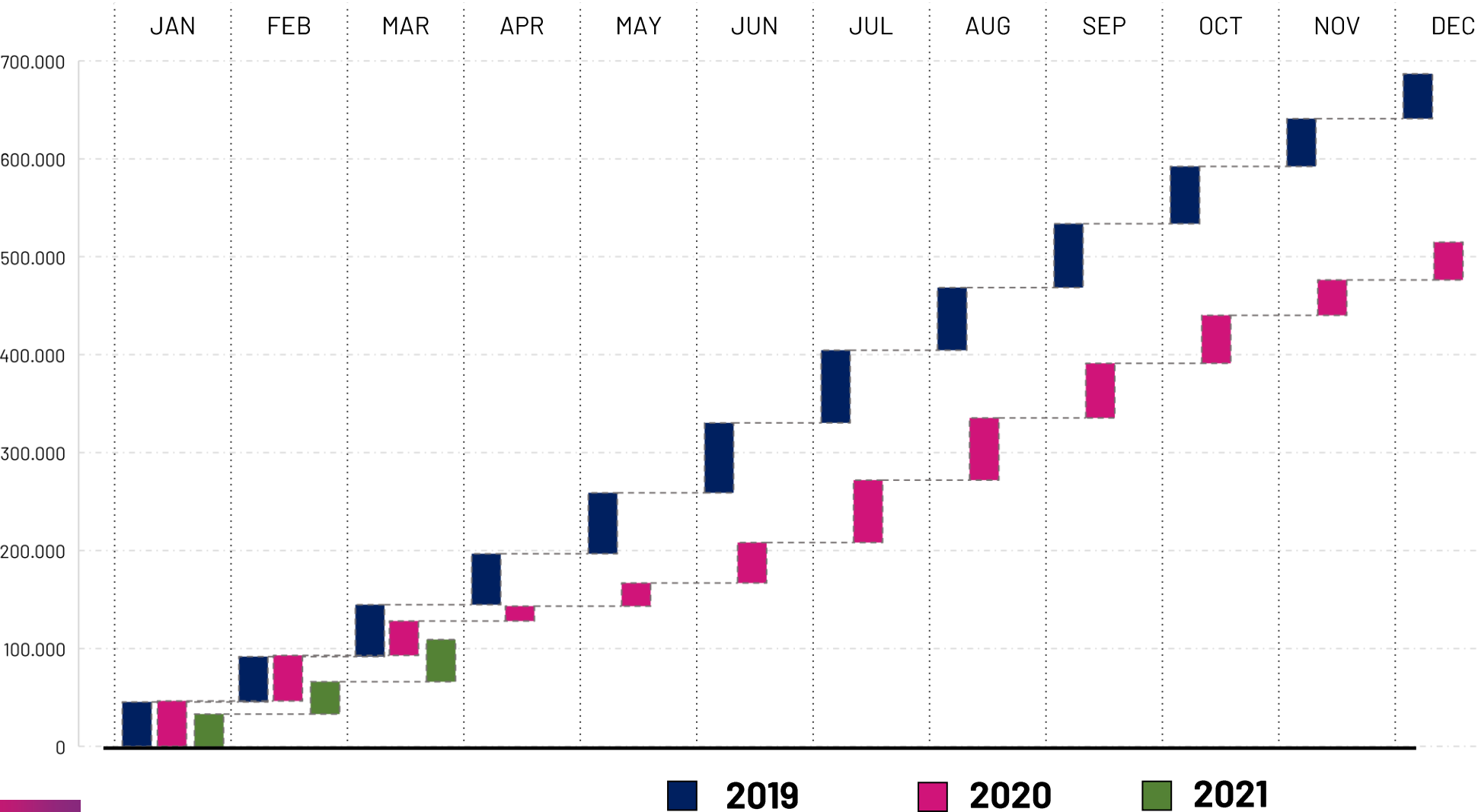
Business Aviation (ECAC Area)

	ARRIVAL			DEPARTURE			INTERNAL			OVERFLIGHT			PREVIOUS YEAR	CURRENT YEAR	GROWTH
Month	Previous Year	Current Year	Growth	Previous Year	Current Year	Growth	Previous Year	Current Year	Growth	Previous Year	Current Year	Growth			
Apr 2020	4.013	1.142	-71,5%	3.954	1.076	-72,8%	44.635	13.150	-70,5%	754	269	-64,3%	53.356	15.637	-70,7%
May 2020	4.197	1.487	-64,6%	3.922	1.432	-63,5%	55.013	21.404	-61,1%	590	277	-53,1%	63.722	24.600	-61,4%
Jun 2020	5.003	2.238	-55,3%	4.805	2.156	-55,1%	62.761	38.235	-39,1%	538	360	-33,1%	73.107	42.989	-41,2%
Jul 2020	4.703	3.168	-32,6%	4.734	3.108	-34,3%	66.005	59.226	-10,3%	461	417	-9,5%	75.903	65.919	-13,2%
Aug 2020	4.296	3.671	-14,5%	4.405	3.660	-16,9%	56.686	58.393	3,0%	425	395	-7,1%	65.812	66.119	0,5%
Sep 2020	4.513	3.161	-30,0%	4.378	3.160	-27,8%	57.134	51.180	-10,4%	570	347	-39,1%	66.595	57.848	-13,1%
Oct 2020	4.290	3.029	-29,4%	4.396	3.072	-30,1%	50.667	44.204	-12,8%	795	591	-25,7%	60.148	50.896	-15,4%
Nov 2020	3.707	2.640	-28,8%	3.672	2.715	-26,1%	42.195	32.228	-23,6%	695	764	9,9%	50.269	38.347	-23,7%
Dec 2020	3.570	3.056	-14,4%	3.661	3.216	-12,2%	38.970	33.426	-14,2%	625	769	23,0%	46.826	40.467	-13,6%
Jan 2021	3.835	2.704	-29,5%	3.610	2.504	-30,6%	39.281	28.277	-28,0%	601	1.004	67,1%	47.327	34.489	-27,1%
Feb 2021	3.394	2.433	-28,3%	3.335	2.401	-28,0%	40.358	28.938	-28,3%	498	596	19,7%	47.585	34.368	-27,8%
Mar 2021	2.865	3.005	4,9%	2.796	3.028	8,3%	29.785	37.445	25,7%	402	987	145,5%	35.848	44.465	+24,0%
Grand Total	48.386	31.734	-34,4%	47.668	31.528	-33,9%	583.490	446.106	-23,5%	6.954	6.776	-2,6%	686.498	516.144	-24,8%

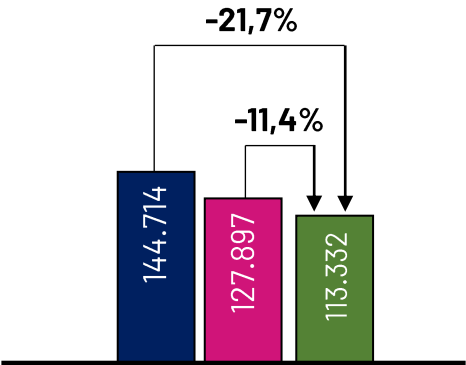
This report is made possible thanks to EUROCONTROL and WINGX ADVANCE

BUSINESS AVIATION ACTIVITY THROUGHOUT THE COVID CRISIS

« YEAR-TO-DATE » DETAILS IN EUROPE (FLIGHTS FROM JANUARY ONWARDS)



« YEAR-TO-DATE »
(From January to « March »)



STATES – March 2021

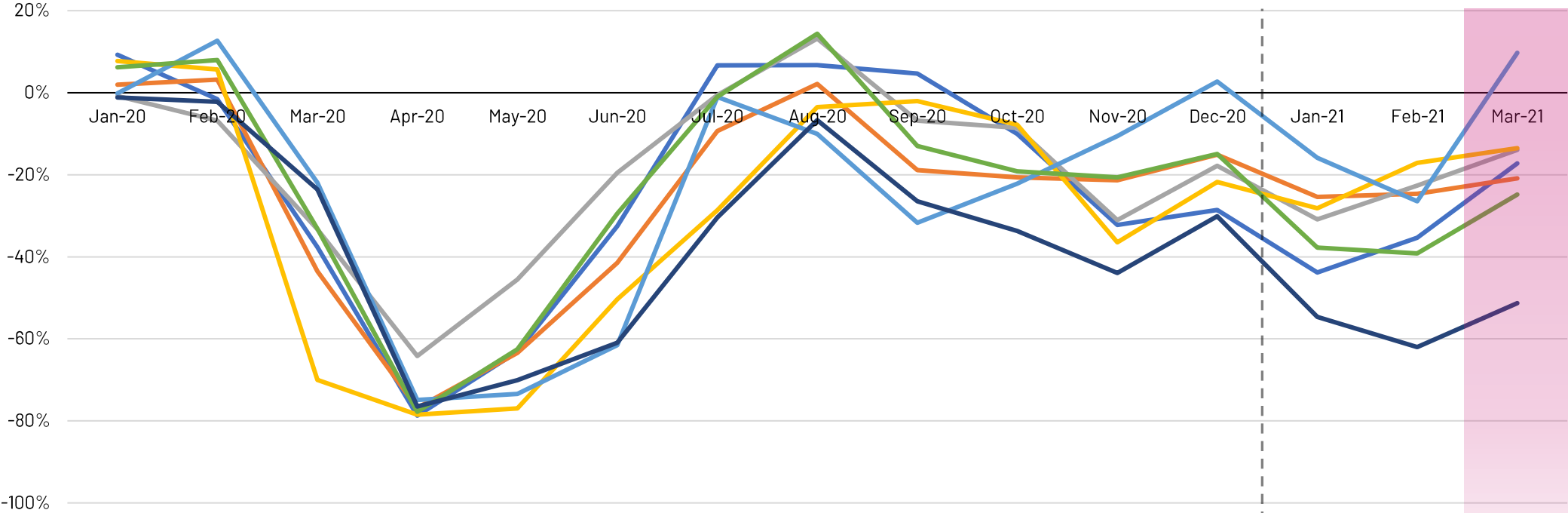
AVERAGE DAILY BUSINESS AVIATION FLIGHTS

STATE	MONTH CURRENT YEAR	MONTH GROWTH	YTD CURRENT YEAR	YTD GROWTH
NM Area	1.453,8	25,0%	1.274,9	-11,9%
ECAC	1.434,4	24,0%	1.259,1	-12,4%
ESRA08	1.399,1	23,0%	1.226,0	-13,5%
SES-RP2	1.356,0	21,0%	1.187,5	-14,9%
FABEC	851,3	14,2%	742,8	-21,5%
BLUE MED FAB	322,1	77,9%	274,8	3,8%
FAB CE	255,8	26,8%	227,9	-13,9%
UK-Ireland FAB	188,7	-38,2%	164,1	-52,7%
South West FAB	180,4	17,5%	149,0	-13,7%
NEFAB	101,5	-9,1%	99,9	-13,0%
Baltic FAB	95,4	12,9%	85,2	-15,3%
DK-SE FAB	91,3	-16,3%	83,7	-26,0%
Danube FAB	75,8	53,9%	70,7	27,6%

STATES – March 2021

MONTHLY TRAFFIC GROWTH compared with the same month in « normal times » (before Mar.20)

Given the specificity of March 2020 (that cannot be considered as « normal »), March 2021 has been compared with March 2019 instead



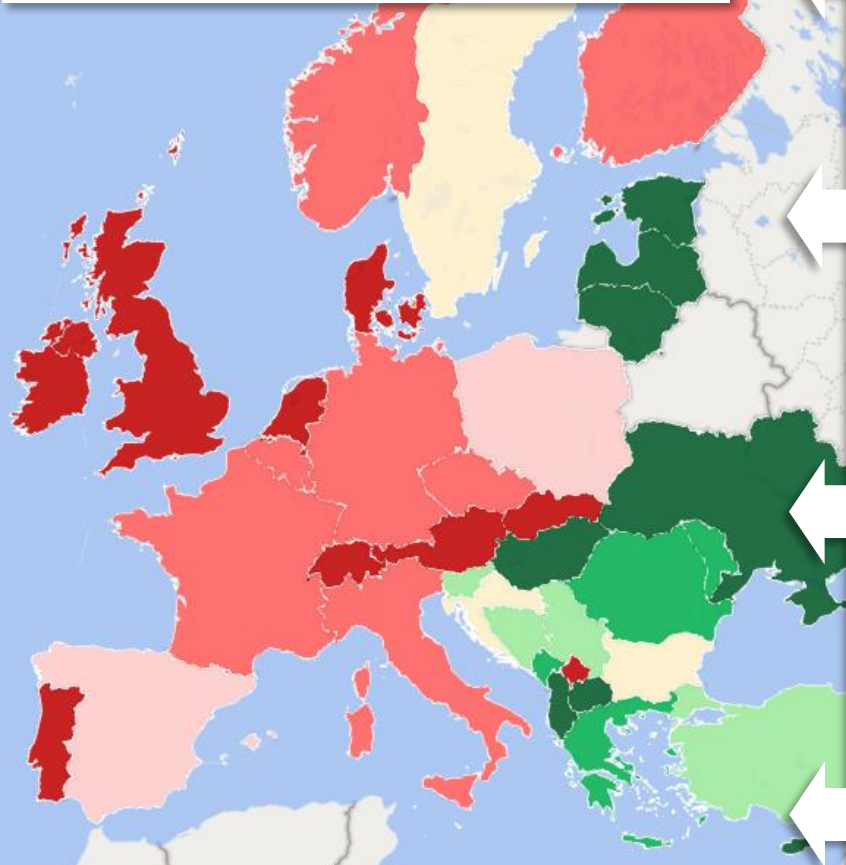
	Jan-20	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	Mar-21
Austria	9%	-2%	-38%	-79%	-63%	-33%	7%	7%	5%	-10%	-32%	-29%	-44%	-35%	-17%
France	2%	3%	-44%	-77%	-63%	-41%	-9%	2%	-19%	-21%	-21%	-15%	-25%	-25%	-21%
Germany	-1%	-7%	-33%	-64%	-46%	-20%	-1%	13%	-7%	-9%	-31%	-18%	-31%	-23%	-14%
Italy	8%	6%	-70%	-78%	-77%	-50%	-29%	-4%	-2%	-8%	-36%	-22%	-28%	-17%	-13%
Spain	0%	13%	-22%	-75%	-73%	-62%	-1%	-10%	-32%	-22%	-11%	3%	-16%	-26%	10%
Switzerland	6%	8%	-33%	-78%	-63%	-29%	-1%	14%	-13%	-19%	-21%	-15%	-38%	-39%	-25%
United Kingdom	-1%	-2%	-24%	-76%	-70%	-61%	-30%	-7%	-26%	-34%	-44%	-30%	-55%	-62%	-51%

COVID IMPACT COUNTRY PER COUNTRY – STATE OF PLAY – YTD 2021 (Jan-Mar 21)

« YEAR-TO-DATE » details in Europe (flights from january onwards)

Compared with January-March 2019 (« normal times »)

This map shows the **REAL STATE OF THE INDUSTRY**
(from a recovery perspective)

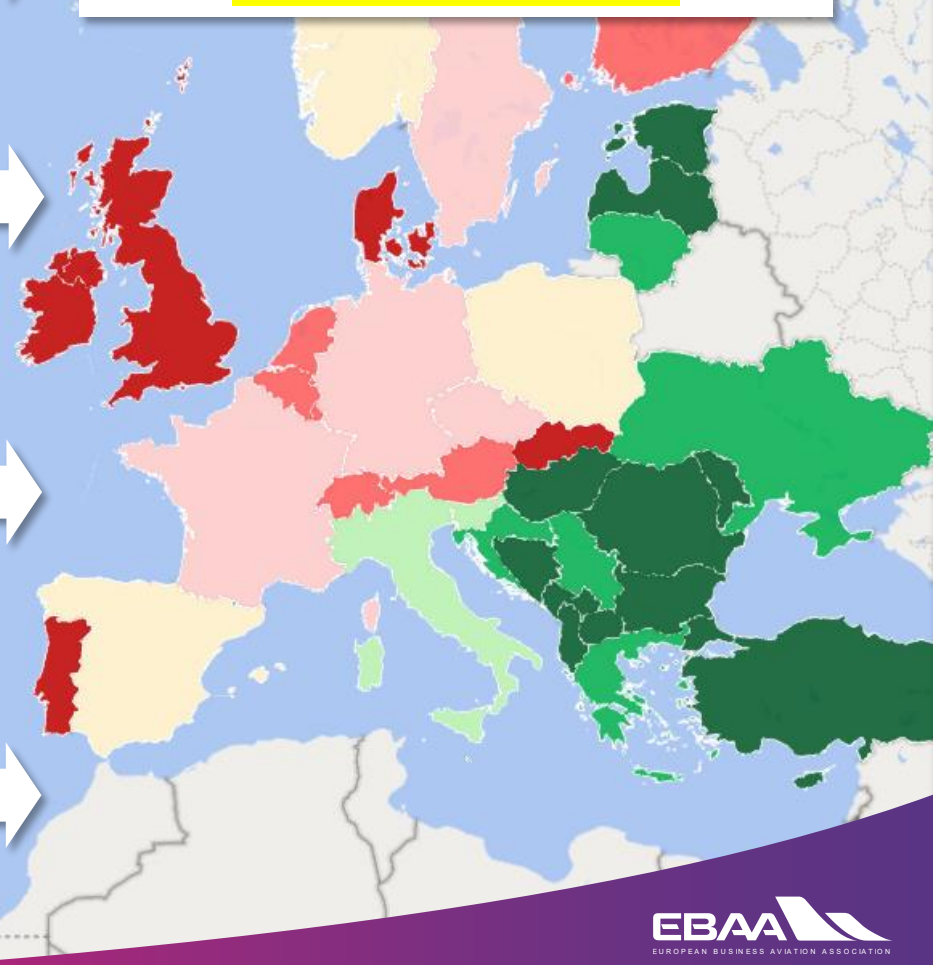


BUSINESS AVIATION MOVEMENTS JAN-MAR 21

+208%	Albania	416	+220%
-31%	Austria	6.381	-22%
-28%	Belgium	4.094	-20%
+14%	Bosnia & Herzeg.	288	+63%
+2%	Bulgaria	1.017	+36%
-1%	Croatia	1.412	17%
+42%	Cyprus	1.615	+44%
-19%	Czech Republic	2.926	-11%
-37%	Denmark	1.815	-30%
+43%	Estonia	657	+61%
-26%	Finland	2.774	-18%
-22%	France	38.138	-8%
-24%	Germany	31.249	-11%
+22%	Greece	3.119	+28%
+32%	Hungary	2.061	+48%
-36%	Iceland	390	-26%
-35%	Ireland	1.628	-32%
-16%	Italy	15.899	+11%
-33%	Kosovo	119	+38%
+161%	Latvia	1.289	+50%
+137%	Lithuania	862	+20%
-24%	Luxembourg	1.169	-18%
+53%	Macedonia	216	+57%
+19%	Malta	1.043	+51%
+18%	Moldova	148	+31%
+25%	Montenegro	403	+44%
-41%	Netherlands	3.206	-29%
-16%	Norway	8.477	-4%
-14%	Poland	3.714	+4%
-33%	Portugal	1.898	-33%
+21%	Romania	2.346	+60%
+14%	Serbia	1.796	+26%
-53%	Slovakia	804	-41%
+11%	Slovenia	677	+12%
-7%	Spain	15.230	-3%
-1%	Sweden	8.659	-8%
-31%	Switzerland	16.099	-26%
+9%	Turkey	7.826	+45%
+31%	Ukraine	2.972	+26%
-56%	United Kingdom	18.440	-52%

Compared with January-March 2020 (« unnormal time »)

Given the specificity of 2020 (especially from
march onwards), this map shows a
DISTORTED STATE OF THE INDUSTRY



TOP 10 ACTIVE AIRPORTS – March 2021

AVERAGE DAILY BUSINESS AVIATION DEPARTURES

RANK	ICAO CODE	NAME	MONTH CURRENT YEAR	MONTH GROWTH	YTD CURRENT YEAR	YTD GROWTH
1	LFPB	PARIS LE BOURGET	40,8	10,8%	38,5	-23,1%
2	LSGG	GENEVE COINTRIN	26,9	-2,0%	25,3	-25,0%
3 	LSZH	ZURICH	23,6	14,6%	20,8	-20,9%
4 	LFMN	NICE	20,8	5,4%	19,7	-15,2%
5 	LIRA	ROMA CIAMPINO	17,3	171,2%	14,2	22,7%
6 	LIML	MILANO LINATE	17,1	267,4%	14,9	-2,8%
7 	LTBA	ISTANBUL-ATATURK	17,1	109,1%	14,4	47,2%
8 	EGLF	FARNBOROUGH CIV	16,5	-33,4%	13,1	-55,8%
9 	LEPA	PALMA DE MALLORCA	16,5	79,0%	10,9	14,3%
10	LOWW	WIEN SCHWECHAT	16,2	44,5%	13,8	-3,0%

COVID IMPACT TOP 30 AIRPORTS – STATE OF PLAY – YTD 2021 (Jan-Mar 21)

« YEAR-TO-DATE » details in Europe (flights from january onwards)

Compared with January-March 2019 (« normal times »)

This map shows the **REAL STATE OF THE INDUSTRY**
(from a recovery perspective)

BUSINESS AVIATION MOVEMENTS JAN-MAR 21

-34%	LFPB	Paris Le Bourget	7.503	-23%
-34%	LSGG	Geneva International	4.913	-27%
-24%	LSZH	Zurich	4.083	-20%
-25%	LFMN	Nice Côte d'Azur	3.891	-14%
-29%	LIML	Milano Linate	2.753	-4%
-12%	LOWW	Wien Schwechat	2.667	-3%
-5%	LTBA	Roma Ciampino	2.665	+22%
+25%	LIRA	Istanbul Atatürk	2.617	+44%
-59%	EDDM	Farnborough	2.552	-57%
-31%	EGLF	München	2.431	-18%
-17%	EDDB	Berlin Schönefeld	2.366	-7%
+32%	LKPR	Palma de Mallorca	2.143	+16%
-15%	EGGW	Prague Vaclav Havel	1.988	-2%
-67%	LEMG	London Luton	1.966	-65%
-26%	EDDK	Madrid Barajas	1.966	-13%
+33%	LEMD	Malaga Costa del Sol	1.964	+2%
0%	EGKB	Köln Bonn	1.795	+2%
-48%	LEPA	London Biggin Hill	1.777	-52%
+18%	EDDH	Belgrade Nikola Tesla	1.756	+28%
-11%	EDDS	Hamburg	1.635	-10%
-31%	LYBE	Stuttgart	1.625	-15%
-26%	LGAV	Barcelona	1.603	-3%
+55%	LSGS	Athens International	1.592	+29%
-34%	ENTC	Sion	1.512	-32%
-25%	LSZB	Dusseldorf	1.500	-13%
+27%	LHBP	Budapest International	1.420	+43%
-11%	EDDL	Tromsø Langnes	1.395	-2%
-28%	LEBL	Brussels National	1.391	-32%
+45%	EVRA	Larnaka International	1.361	+42%
-5%	LTAC	Bordeaux Merignac	1.310	19%

Compared with January-March 2020 (« unnormal time »)

Given the specificity of 2020 (especially from
march onwards), this map shows a
DISTORTED STATE OF THE INDUSTRY

TOP 30 BUSINESS AVIATION ROUTES – YTD 2021 (Jan-Mar 21)

TRAFFIC GROWTH (compared with YTD 20)

Compared with JAN-MAR 19
(« normal times »)

Compared with JAN-MAR 20
(« unnormal times »)

BUSINESS AVIATION MOVEMENTS JAN-MAR 21 (BOTH DIRECTIONS)

LSGG	Geneva International	LFPB	Paris Le Bourget	591	-19%	-31%
ESSA	Stockholm Arlanda	ESND	Sveg	582	+11%	+29K%
LIML	Milano Linate	LIRA	Roma Ciampino	402	+40%	+19%
EVRA	Riga International	UUWW	Moscow Vnukovo	399	+108%	+375%
ESNU	Umeå	ESPA	Luleå Kallax	326	+52%	+54%
LCLK	Larnaka International	LLBG	Tel Aviv International	317	+142%	+208%
LTAC	Ankara Esenboğa	LTBA	Istanbul Atatürk	311	-18%	+14%
LFPB	Paris Le Bourget	LFMN	Nice Côte d'Azur	281	-15%	-19%
ENAT	Alta	ENTC	Tromsø Langnes	266	-1%	-2%
ESPA	Luleå Kallax	ESUP	Pajala	252	-9%	-6%
LEBL	Barcelona	LEMD	Madrid Barajas	249	+66%	-1%
ENTC	Tromsø Langnes	ENEV	Harstad Narvik	208	+2%	-2%
LFPB	Paris Le Bourget	LFPB	Paris Le Bourget	206	+69%	+38%
ENAL	Vigra Ålesund	ENVA	Trondheim Vaernes	201	+16%	+12%
LFMN	Nice Côte d'Azur	LSGG	Geneva International	195	-23%	-38%
UUWW	Moscow Vnukovo	LSGG	Geneva International	194	-16%	+8%
LFPB	Paris Le Bourget	EGLF	Farnborough	193	-36%	-52%
LFEC	Quessant	LFRB	Brest Bretagne	190	+3%	-28%
LEPA	Palma de Mallorca	LEMH	Menorca	179	-7%	+14%
LFPB	Paris Le Bourget	LFLY	Lyon Bron	167	6%	-19%
EGJB	Guernsey	EGHH	Bournemouth	164	+1722%	+1162%
LEIB	Ibiza	LEPA	Palma de Mallorca	163	+143%	+308%
UUWW	Moscow Vnukovo	LFMN	Nice Côte d'Azur	163	-36%	-45%
UUWW	Moscow Vnukovo	EYVI	Vilnius International	163	+75%	+527%
EDDB	Berlin Schönefeld	EDDM	München	159	+67%	+64%
LTBA	Istanbul Atatürk	LATI	Tirana International	158	+5167%	+829%
LFPB	Paris Le Bourget	LSGS	Sion	155	-20%	-7%
ENHF	Hammerfest	ENAT	Alta	150	+3%	-4%
LIML	Milano Linate	LFPB	Paris Le Bourget	148	-26%	-45%

Shuttle

Shuttle

Shuttle

TOP 10 FLOWS– March 2021

AVERAGE DAILY BUSINESS AVIATION FLIGHTS

ORIGIN	DESTINATION	MONTH CURRENT YEAR	MONTH GROWTH	YTD CURRENT YEAR	YTD GROWTH
FRANCE	FRANCE	152,4	69,2%	132,2	14,1%
GERMANY	GERMANY	106,7	39,9%	89,5	-3,6%
UK	UK	55,2	-25,5%	47,6	-41,8%
ITALY	ITALY	53,5	164,8%	44,8	33,9%
NORWAY	NORWAY	43,5	15,7%	42,5	4,8%
SPAIN	SPAIN	41,4	125,3%	31,0	23,7%
SWEDEN	SWEDEN	38,0	18,6%	34,8	1,3%
TURKEY	TURKEY	26,8	85,7%	25,5	44,6%
FRANCE	SWITZERLAND	14,7	-2,4%	15,4	-27,6%
SWITZERLAND	SWITZERLAND	14,7	29,8%	14,1	-1,3%

TRAFFIC PER STATE – March 2021

AVERAGE DAILY BUSINESS AVIATION FLIGHTS – PART 1

STATE	MONTH CURRENT YEAR	MONTH PREVIOUS YEAR	MONTH CHANGE	MONTH GROWTH	YTD CURRENT YEAR	YTD PREVIOUS YEAR	YTD CHANGE	YTD GROWTH
NM Area	1.453,8	1.162,8	291,0	25,0%	1.274,9	1.447,7	-172,8	-11,9%
ECAC	1.434,4	1.156,4	278,0	24,0%	1.259,1	1.436,9	-177,8	-12,4%
ESRA08	1.399,1	1.137,3	261,8	23,0%	1.226,0	1.418,1	-192,0	-13,5%
ESRA02	1.377,6	1.125,9	251,7	22,4%	1.206,5	1.403,6	-197,2	-14,0%
SES-RP2	1.356,0	1.121,1	234,9	21,0%	1.187,5	1.395,5	-208,0	-14,9%
SES-RP3	1.309,0	1.060,0	249,0	23,5%	1.147,4	1.327,1	-179,8	-13,5%
EU27	1.259,0	1.020,4	238,6	23,4%	1.098,9	1.282,4	-183,4	-14,3%
FABEC	851,3	745,6	105,7	14,2%	742,8	946,7	-203,9	-21,5%
France	495,7	433,2	62,5	14,4%	432,4	551,2	-118,8	-21,5%
Germany	396,9	349,7	47,2	13,5%	343,4	441,0	-97,6	-22,1%
UK-Ireland FAB	188,7	305,5	-116,7	-38,2%	164,1	347,0	-182,9	-52,7%
UK	185,2	300,6	-115,5	-38,4%	160,5	341,6	-181,1	-53,0%
Switzerland	245,9	206,8	39,1	18,9%	218,8	291,4	-72,6	-24,9%
FAB CE	255,8	201,7	54,0	26,8%	227,9	264,7	-36,8	-13,9%
BLUE MED FAB	322,1	181,1	141,0	77,9%	274,8	264,9	10,0	3,8%
South West FAB	180,4	153,5	26,9	17,5%	149,0	172,7	-23,7	-13,7%
Spain/Canaries	176,7	149,3	27,4	18,4%	145,7	168,4	-22,7	-13,5%
Spain	171,0	143,5	27,4	19,1%	139,9	161,3	-21,4	-13,3%
Italy	254,2	138,3	115,9	83,8%	216,1	216,8	-0,7	-0,3%
Austria	163,8	131,9	31,9	24,2%	143,2	176,6	-33,5	-18,9%
Belgium/Luxembourg	121,1	127,6	-6,5	-5,1%	104,8	153,4	-48,6	-31,7%

TRAFFIC PER STATE – March 2021

AVERAGE DAILY BUSINESS AVIATION FLIGHTS – PART 2

STATE	MONTH CURRENT YEAR	MONTH PREVIOUS YEAR	MONTH CHANGE	MONTH GROWTH	YTD CURRENT YEAR	YTD PREVIOUS YEAR	YTD CHANGE	YTD GROWTH
NEFAB	101,5	111,6	-10,2	-9,1%	99,9	114,8	-14,9	-13,0%
DK-SE FAB	91,3	109,2	-17,8	-16,3%	83,7	113,1	-29,4	-26,0%
Netherlands	79,0	102,0	-23,1	-22,6%	65,8	110,9	-45,0	-40,6%
Sweden	75,7	89,5	-13,7	-15,4%	69,8	90,0	-20,2	-22,4%
Baltic FAB	95,4	84,5	10,9	12,9%	85,2	100,5	-15,4	-15,3%
Poland	83,0	72,7	10,3	14,2%	74,2	89,5	-15,3	-17,1%
Czech Republic	78,8	67,7	11,1	16,4%	74,6	88,1	-13,5	-15,3%
Turkey	114,6	64,6	50,0	77,4%	101,5	72,5	29,1	40,1%
Norway	54,7	56,8	-2,1	-3,7%	53,4	61,9	-8,5	-13,7%
Denmark	34,9	50,5	-15,5	-30,8%	30,5	52,5	-22,0	-41,8%
Greece	69,1	50,2	19,0	37,8%	60,0	61,5	-1,5	-2,4%
Danube FAB	75,8	49,2	26,5	53,9%	70,7	55,4	15,3	27,6%
Ireland	35,1	49,1	-14,0	-28,6%	32,7	58,7	-26,1	-44,4%
Serbia/Montenegro	67,3	49,1	18,2	37,0%	59,3	55,0	4,4	7,9%
Croatia	64,0	47,0	17,0	36,1%	56,1	55,3	0,8	1,4%
Hungary	61,8	45,2	16,6	36,7%	57,7	51,1	6,7	13,1%
Belarus	44,4	41,0	3,4	8,2%	39,4	49,8	-10,3	-20,8%
Bulgaria	52,1	35,5	16,6	46,9%	45,4	39,2	6,2	15,8%
Lisbon FIR	23,8	35,1	-11,3	-32,1%	22,6	35,3	-12,8	-36,2%
Slovenia	44,2	34,9	9,3	26,6%	37,3	39,8	-2,5	-6,2%
Morocco	29,8	34,4	-4,6	-13,3%	27,5	39,6	-12,2	-30,7%

TRAFFIC PER STATE – March 2021

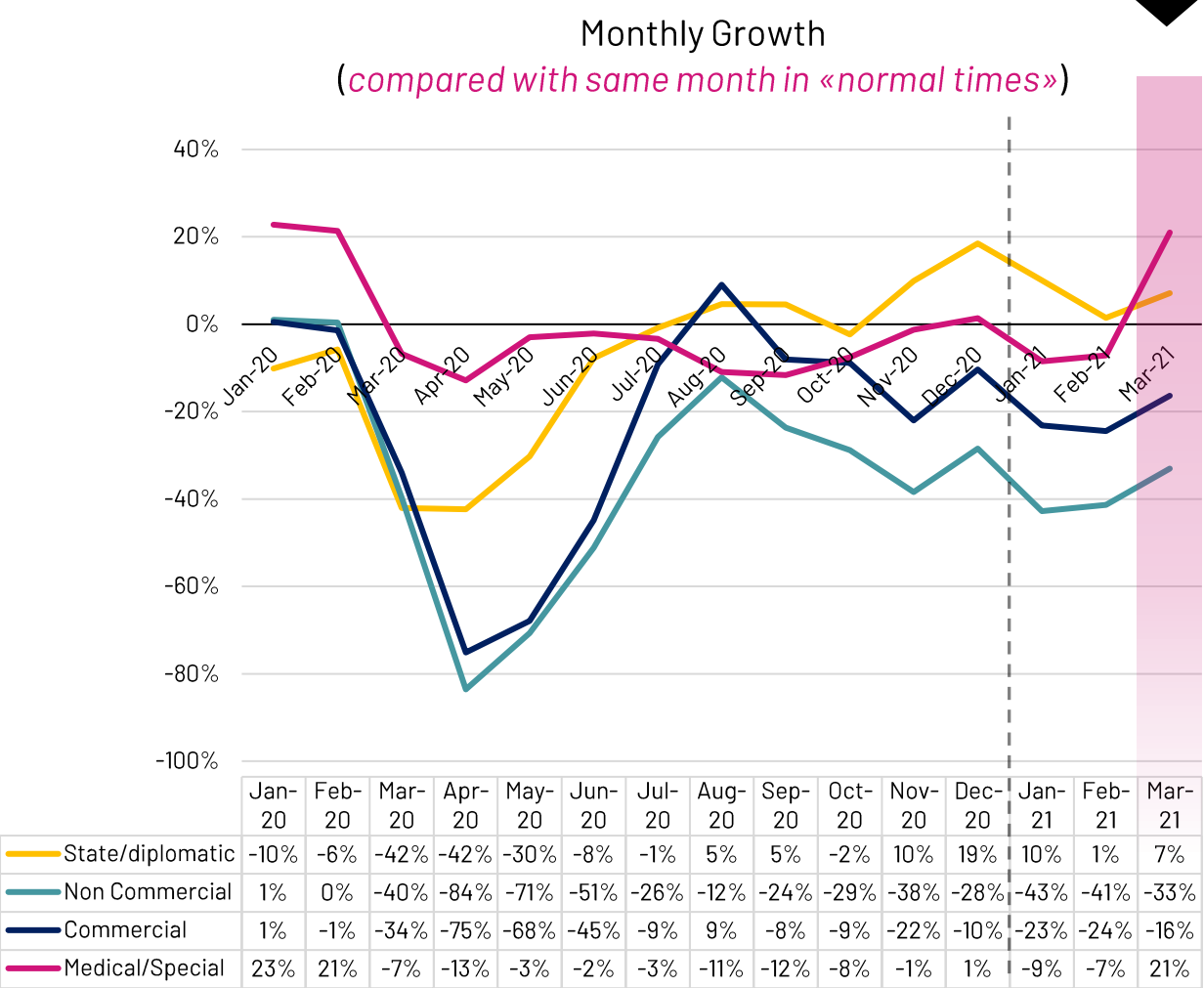
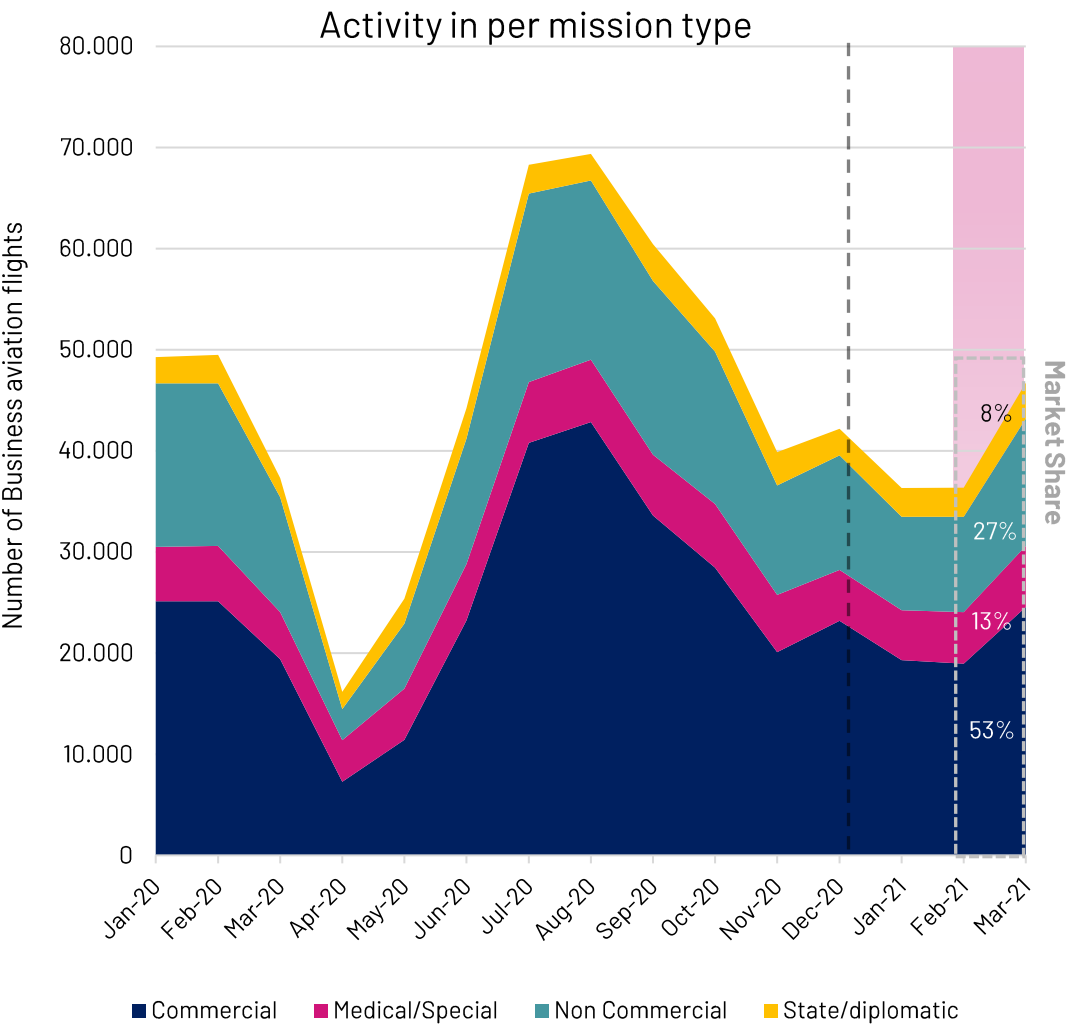
AVERAGE DAILY BUSINESS AVIATION FLIGHTS – PART 3

STATE	MONTH CURRENT YEAR	MONTH PREVIOUS YEAR	MONTH CHANGE	MONTH GROWTH	YTD CURRENT YEAR	YTD PREVIOUS YEAR	YTD CHANGE	YTD GROWTH
Romania	50,7	34,3	16,4	47,9%	49,5	37,9	11,6	30,7%
Slovakia	34,2	33,5	0,6	1,8%	32,1	41,9	-9,8	-23,4%
Finland	24,8	33,0	-8,2	-24,9%	25,3	33,9	-8,5	-25,2%
Ukraine	44,0	30,5	13,5	44,4%	40,6	31,3	9,4	30,0%
Lithuania	27,0	29,6	-2,5	-8,6%	25,3	29,6	-4,3	-14,4%
Latvia	25,0	26,9	-1,9	-7,0%	24,9	24,8	0,1	0,4%
Cyprus	46,5	26,4	20,1	76,3%	39,1	32,6	6,5	19,8%
Bosnia and Herzegovina	33,2	24,4	8,9	36,4%	29,4	28,1	1,2	4,4%
Egypt	27,6	21,5	6,1	28,6%	25,1	31,4	-6,2	-19,9%
Canary Islands	12,9	18,9	-6,0	-31,6%	11,8	19,1	-7,3	-38,0%
Estonia	15,9	16,0	-0,1	-0,4%	14,7	15,3	-0,7	-4,3%
Santa Maria FIR	13,8	13,8	-0,1	-0,5%	13,8	15,1	-1,3	-8,9%
Albania	18,4	13,7	4,7	34,2%	17,7	15,3	2,4	15,6%
North Macedonia	16,6	12,3	4,4	35,4%	14,8	13,6	1,2	9,0%
Iceland	9,2	11,5	-2,3	-20,2%	8,2	14,2	-6,0	-42,4%
Israel	31,5	11,4	20,1	176,0%	23,6	16,0	7,7	47,9%
Malta	18,9	10,5	8,5	80,9%	18,0	12,9	5,1	39,3%
Azerbaijan	20,6	9,5	11,1	117,0%	18,5	10,3	8,2	79,0%
Georgia	11,1	8,0	3,2	39,7%	7,7	7,5	0,3	3,9%
Tunisia	9,7	5,4	4,4	81,9%	7,8	7,6	0,2	2,9%
Moldova	7,3	4,5	2,9	64,5%	6,4	4,6	1,8	38,7%
Armenia	4,8	3,3	1,5	47,5%	3,4	3,8	-0,5	-11,9%
Libya	4,8	2,7	2,1	79,5%	4,5	3,0	1,4	47,5%

BUSINESS AVIATION MISSIONS – March 2021

MONTHLY TRAFFIC & MONTHLY GROWTH (compared with 1 year ago)

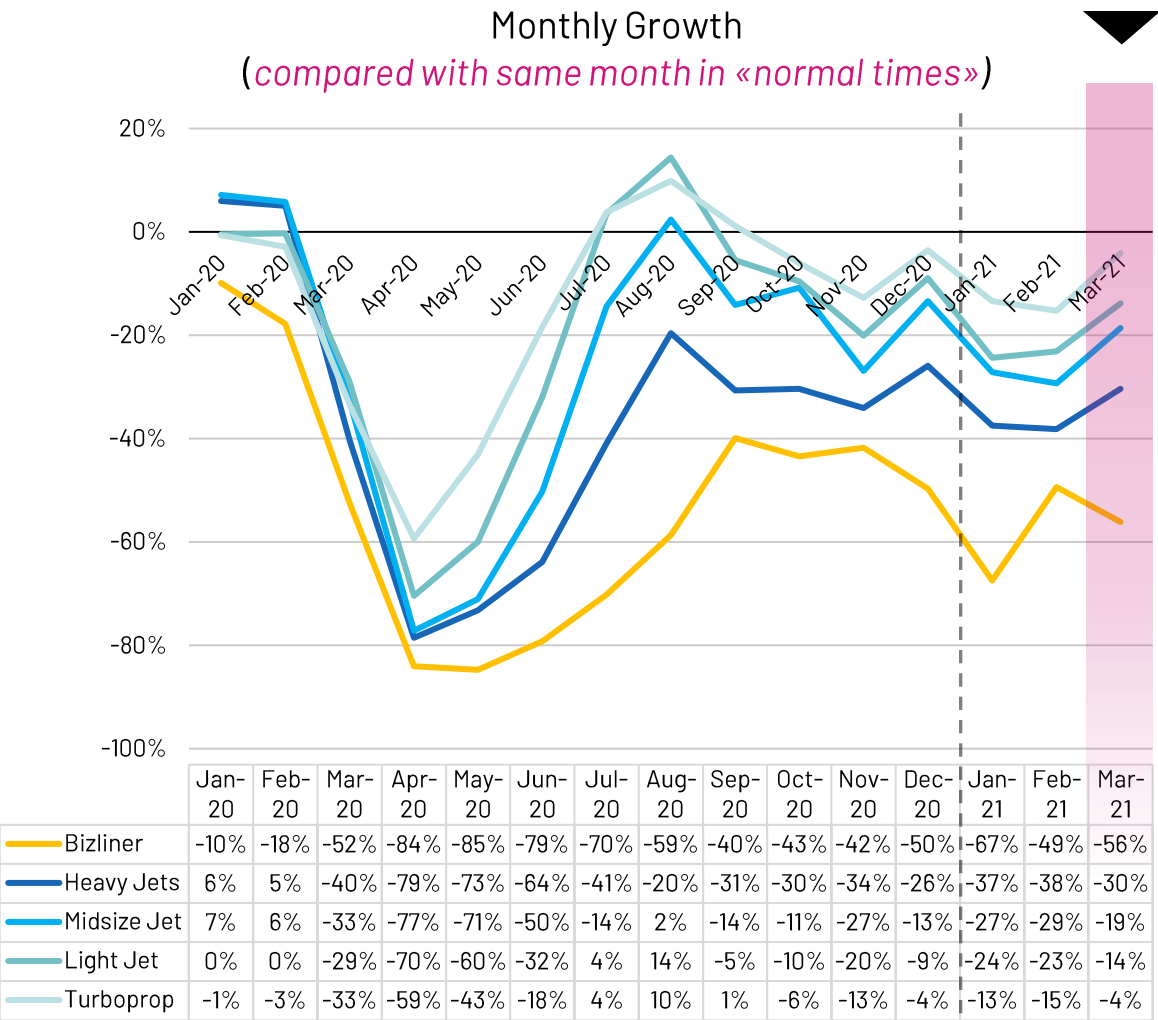
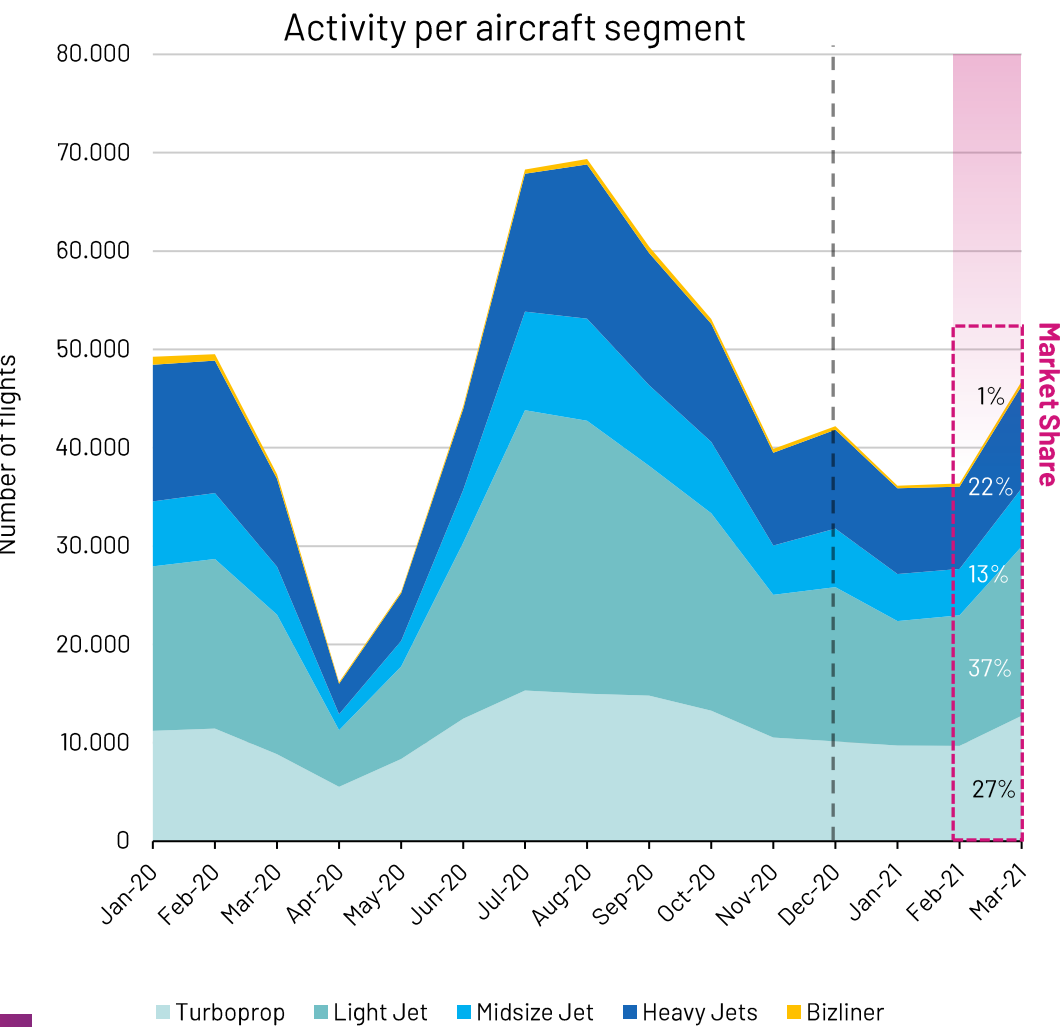
Given the specificity of March 2020 (that cannot be considered as « normal »), March 2021 has been compared with March 2019 instead



BUSINESS AVIATION AIRPLANES – March 2021

2020 MONTHLY TRAFFIC & MONTHLY GROWTH (compared with 1 year ago)

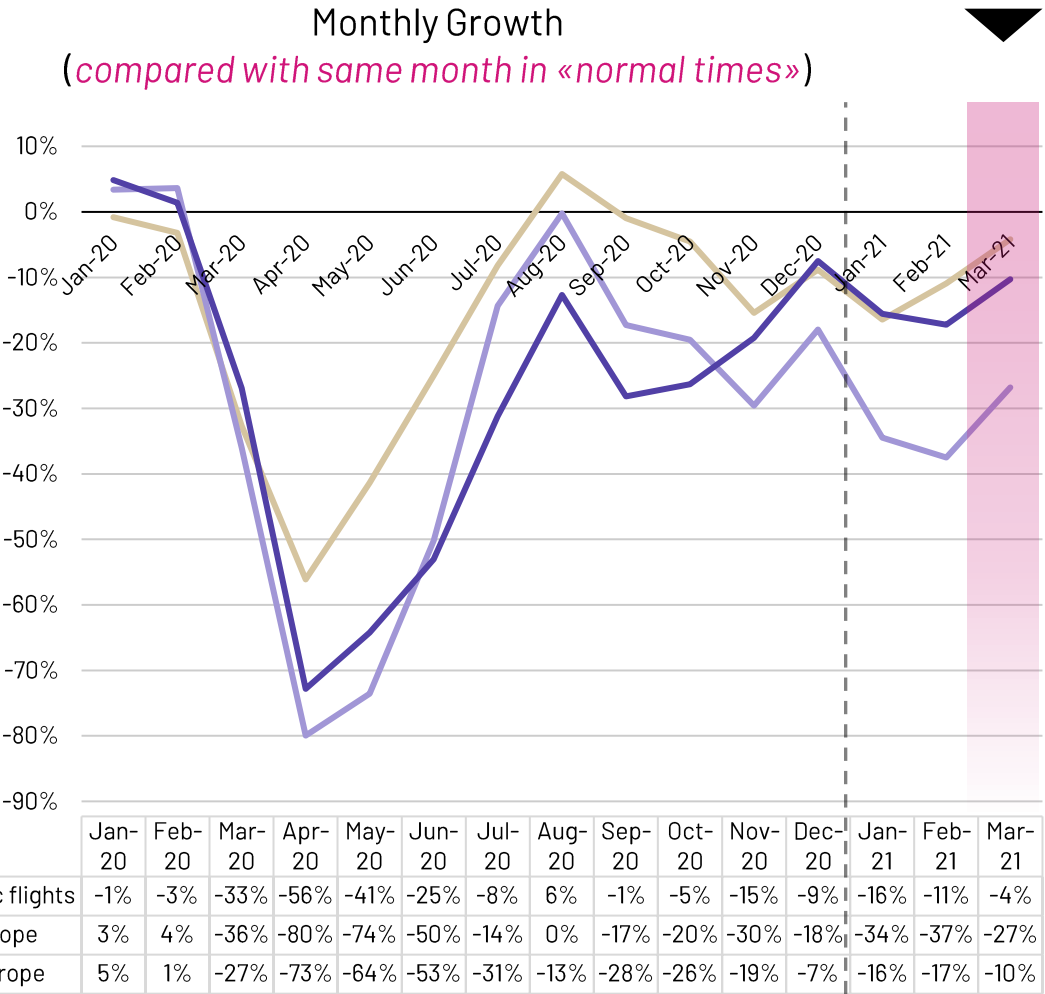
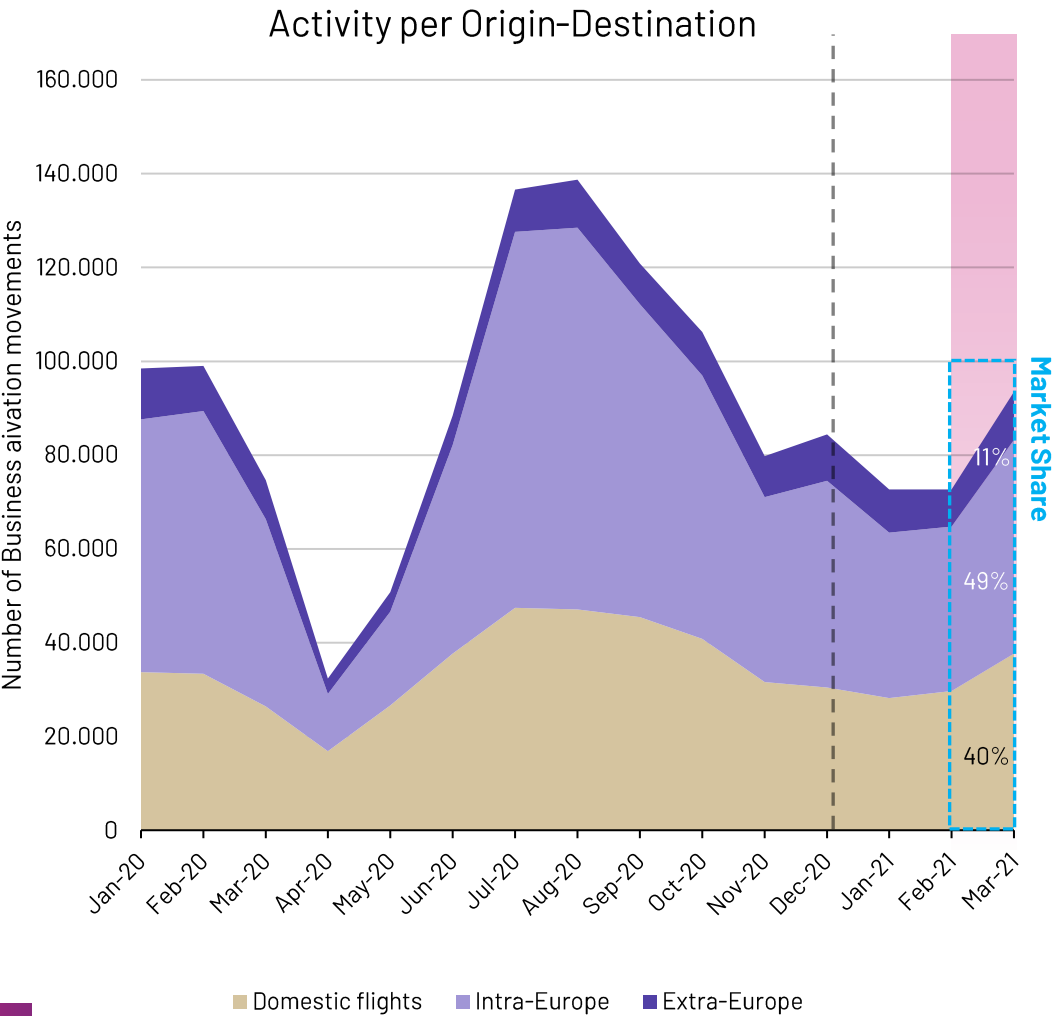
Given the specificity of March 2020 (that cannot be considered as « normal »), March 2021 has been compared with March 2019 instead



BUSINESS AVIATION ORIGINS & DESTINATIONS- March 2021

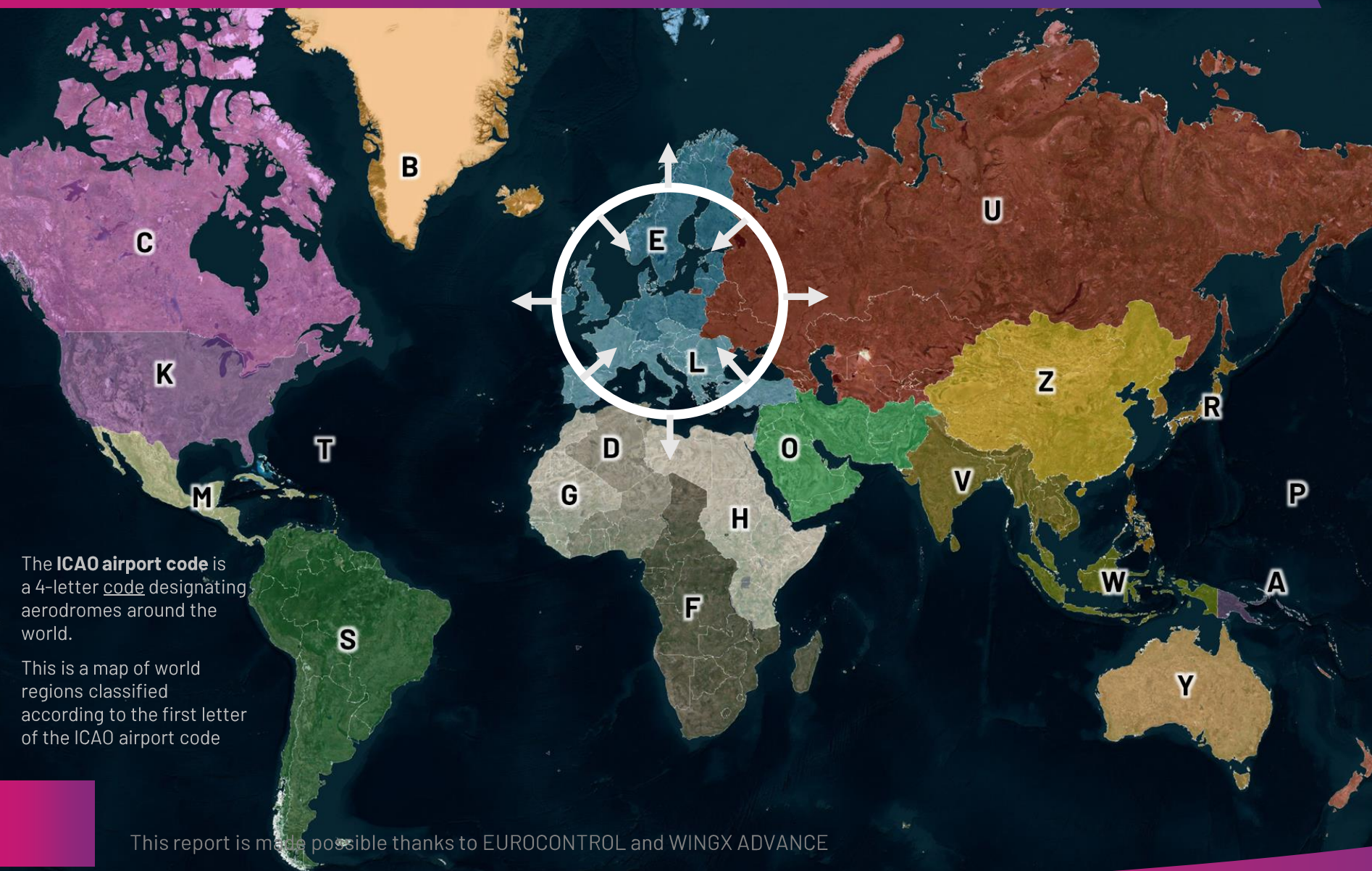
2020 MONTHLY TRAFFIC & MONTHLY GROWTH (compared with 1 year ago)

Given the specificity of March 2020 (that cannot be considered as « normal »), March 2021 has been compared with March 2019 instead



EUROPEAN BUSINESS AVIATION INTERCONTINENTAL CONNECTIONS – March 2021

2020 MONTHLY TRAFFIC & MONTHLY GROWTH (compared with Jan-20)



Compared with JAN-MAR 19
 («normal times»)

Flights JAN-MAR 21 (both directions)

B	Greenland, Iceland	538	-33%
C	Canada	320	-52%
D	Eastern parts of West Africa and Maghreb	1217	-2%
F	Central and Southern Africa, and the Indian Ocean	420	-11%
G	Western parts of West Africa and Maghreb	4317	-20%
H	East Africa and Northeast Africa	1529	4%
K	United States	1594	-61%
M	Central America, Mexico and Caribbean	355	+43%
O	Pakistan, Afghanistan and Middle East	4915	5%
R	North Western Pacific	20	-82%
S	South America	115	-51%
T	Eastern and southern parts of the Caribbean	445	19%
U	Russia and post-Soviet states	11392	1%
V	South Asia	692	8%
W	Maritime Southeast Asia	15	-71%
Z	Mainland East Asia	9	-95%

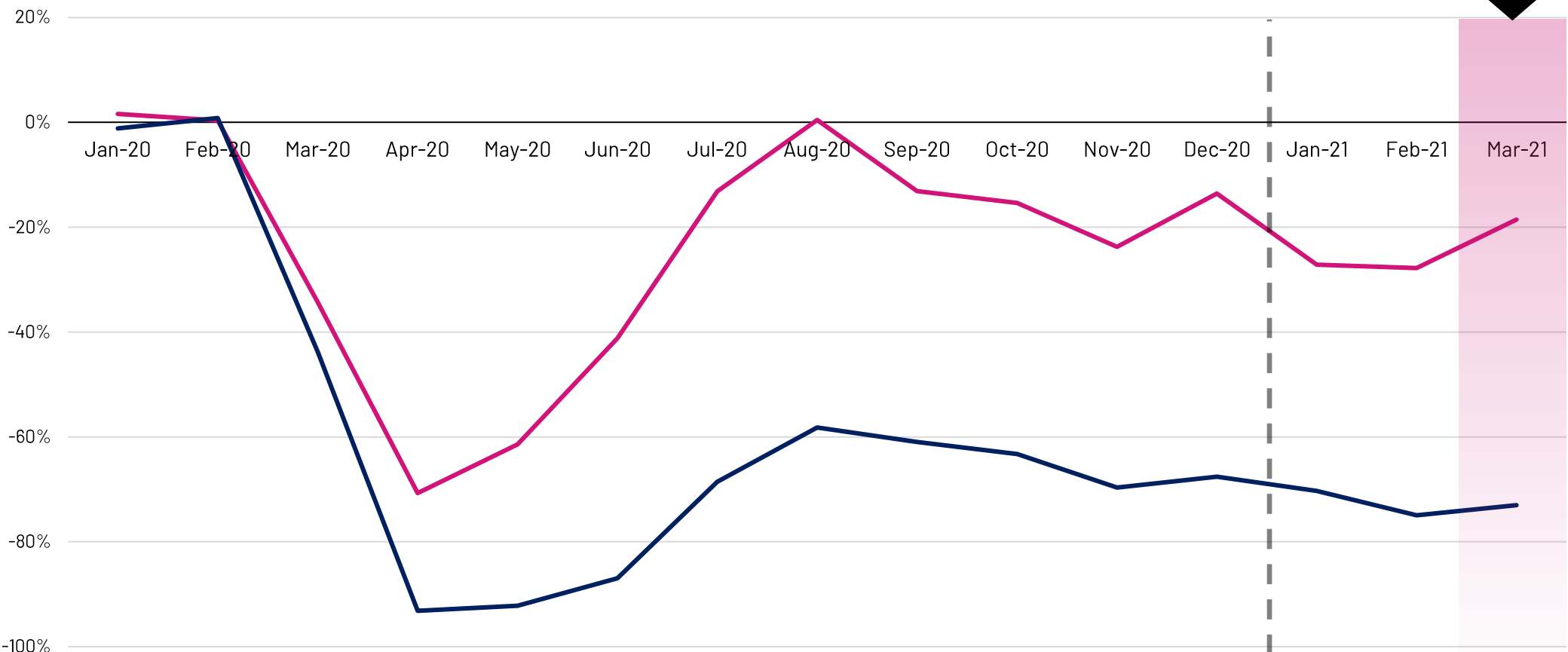
This report is made possible thanks to EUROCONTROL and WINGX ADVANCE

BUSINESS AVIATION VS. AIRLINES

MONTHLY TRAFFIC GROWTH (compared with same month one year before)

Given the specificness of March 2020 (that cannot be considered as « normal »), March 2021 has been compared with March 2019 instead

Airlines:
Legacy Carriers,
Low Cost Airlines,
Charter Airlines

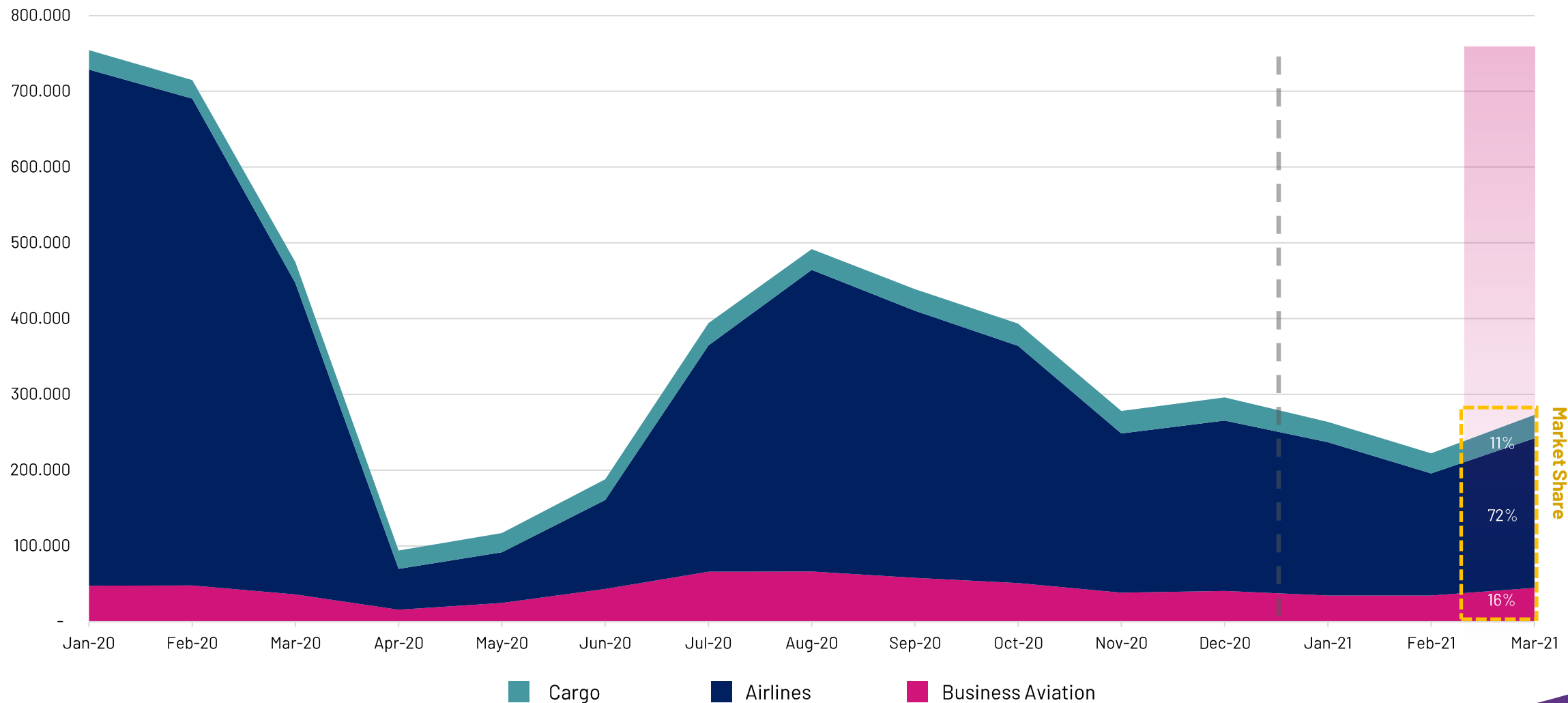


	Jan-20	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	Mar-21
— BizAv Growth	2%	0%	-34%	-71%	-61%	-41%	-13%	0%	-13%	-15%	-24%	-14%	-27%	-28%	-19%
— Airlines Growth	-1%	1%	-44%	-93%	-92%	-87%	-69%	-58%	-61%	-63%	-70%	-68%	-70%	-75%	-73%

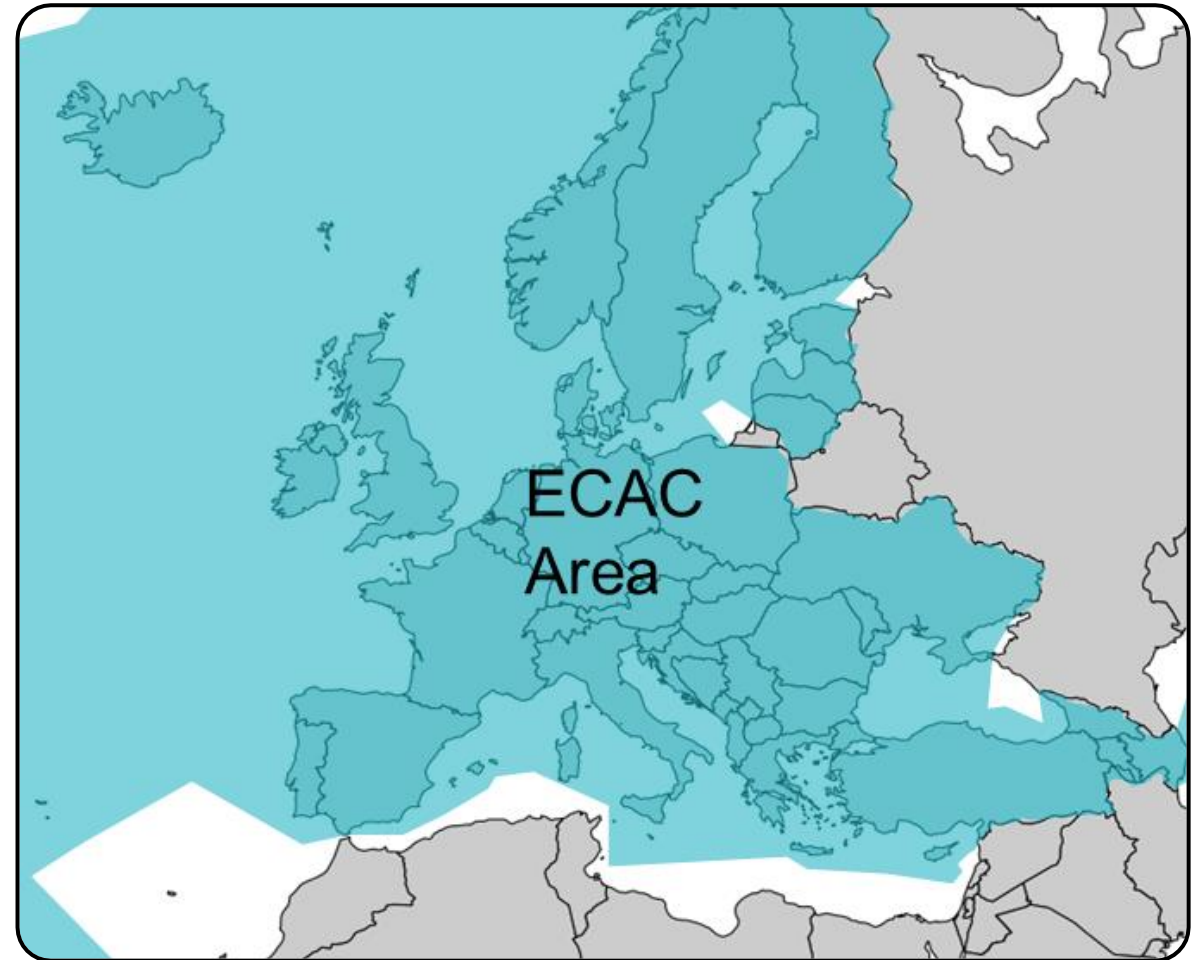
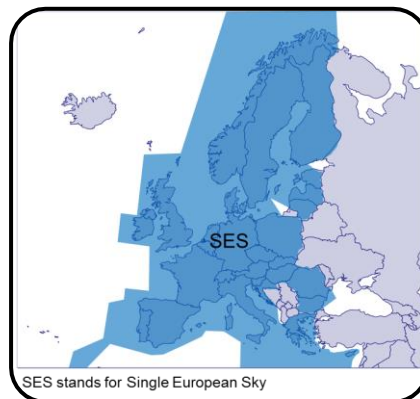
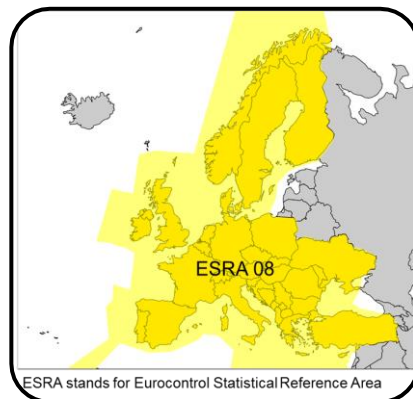
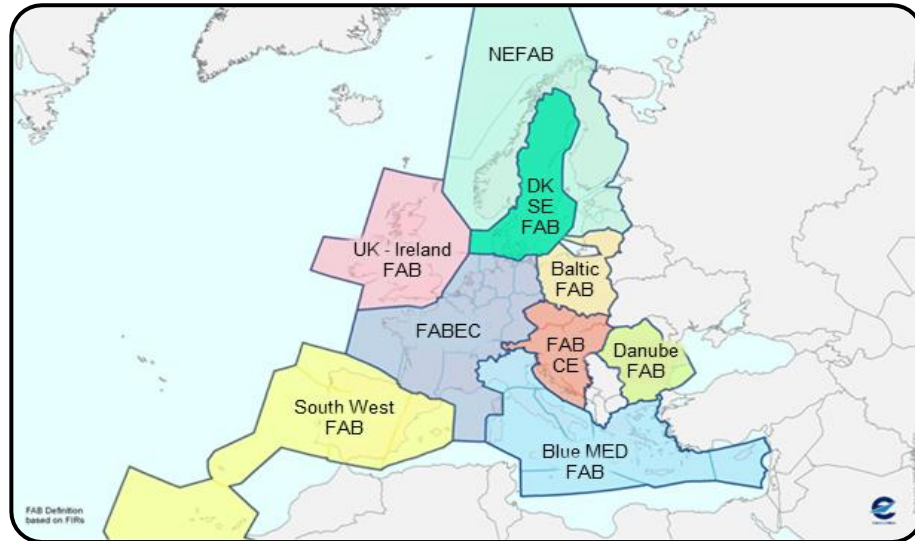
— BizAv Growth — Airlines Growth

BUSINESS AVIATION VS. AIRLINES & CARGO

MONTHLY TRAFFIC MARKET SHARE



AREAS



ECAC stands for European Civil Aviation Conference

BUSINESS AVIATION SEGMENTS

The « Business Aviation » segment is defined by Eurocontrol as follows :

A318	Airbus A318	Airbus	Bizliner	ICAO flight type G only	F2TH	Dassault Falcon 2000	Dassault	Heavy Jet	
A319	Airbus A319	Airbus	Bizliner	ICAO flight type G only	F900	Dassault Falcon 900	Dassault	Heavy Jet	
A320	Airbus A320	Airbus	Bizliner	ICAO flight type G only	FA10	Dassault Falcon 10/100	Dassault	Light Jet	
ASTR	Gulfstream G100	Gulfstream	Midsize Jet		FA20	Dassault Falcon 20/200	Dassault	Midsize Jet	
B350	King Air 350	Hawker Beechcraft	Turboprop	ICAO flight type G and N only	FA50	Dassault Falcon 50	Dassault	Midsize Jet	
B737	Boeing 737-700	Boeing	Bizliner	ICAO flight type G only	FA7X	Dassault Falcon 7X	Dassault	Heavy Jet	
B738	Boeing 737-800	Boeing	Bizliner	ICAO flight type G only	FA8X	Dassault Falcon 8X	Dassault	Heavy Jet	
B739	Boeing 737-900	Boeing	Bizliner	ICAO flight type G only	G150	Gulfstream G150	Gulfstream	Midsize Jet	
B748	Boeing 747-8i	Boeing	Bizliner	ICAO flight type G only	G280	Gulfstream G280	Gulfstream	Midsize Jet	
B77L	Boeing 777-200 Freighter	Boeing	Bizliner	ICAO flight type G only	GA5C	Gulfstream G500/550	Gulfstream	Heavy Jet	
B77W	Boeing 777-300ER	Boeing	Bizliner	ICAO flight type G only	GA6C	Gulfstream G600/650	Gulfstream	Heavy Jet	
B788	Boeing 787-8	Boeing	Bizliner	ICAO flight type G only	GALX	Gulfstream G200	Gulfstream	Midsize Jet	
B789	Boeing 787-9	Boeing	Bizliner	ICAO flight type G only	GL5T	Global 5000	Bombardier	Heavy Jet	
BE10	King Air 100	Hawker Beechcraft	Turboprop		GL6T	Global 6000	Bombardier	Heavy Jet	
BE20	King Air 200	Hawker Beechcraft	Turboprop		GLEX	Global Express / 6000	Bombardier	Heavy Jet	
BE30	Super King Air 300	Hawker Beechcraft	Turboprop		GLF2	Gulfstream 2	Gulfstream	Heavy Jet	
BE40	Hawker Beechcraft 400	Hawker Beechcraft	Light Jet		GLF3	Gulfstream 3	Gulfstream	Heavy Jet	
BE90	King Air 90	Hawker Beechcraft	Turboprop		GLF4	Gulfstream G300/450	Gulfstream	Heavy Jet	
BE9L	King Air 90	Hawker Beechcraft	Turboprop		GLF5	Gulfstream G500/550	Gulfstream	Heavy Jet	
BE9T	King Air 90	Hawker Beechcraft	Turboprop		GLF6	Gulfstream G600/650	Gulfstream	Heavy Jet	ICAO flight type G and N only
C208	Cessna 208 Caravan	Cessna	Turboprop		H25B	Hawker 700-900	Hawker Beechcraft	Midsize Jet	
C25A	Cessna Citation CJ2	Cessna	Light Jet		H25C	British Aerospace 125-1000	British Aerospace	Light Jet	
C25B	Cessna Citation CJ3	Cessna	Light Jet		HA4T	Hawker 4000	Hawker Beechcraft	Midsize Jet	
C25C	Cessna Citation CJ4	Cessna	Light Jet		HDJT	HondaJet	Honda	Light Jet	
C25M	Cessna M2	Cessna	Light Jet		HF20	Hansa Jet	Hamburger Flugzeugbau	Light Jet	
C425	Cessna Corsair	Cessna	Turboprop		LJ23	Learjet 23	Bombardier	Light Jet	
C441	Cessna Conquest	Cessna	Turboprop		LJ24	Learjet 24	Bombardier	Light Jet	
C500	Cessna Citation I	Cessna	Light Jet		LJ25	Learjet 25	Bombardier	Light Jet	
C501	Cessna Citation ISP	Cessna	Light Jet		LJ28	Learjet 28	Bombardier	Light Jet	
C510	Cessna Citation Mustang	Cessna	Light Jet		LJ31	Learjet 31	Bombardier	Light Jet	
C525	Cessna Citation CJ1	Cessna	Light Jet		LJ35	Learjet 35	Bombardier	Light Jet	
C550	Cessna Citation II	Cessna	Light Jet		LJ40	Learjet 40	Bombardier	Light Jet	
C551	Cessna Citation IISP	Cessna	Light Jet		LJ45	Learjet 45	Bombardier	Light Jet	
C55B	Cessna Citation Bravo	Cessna	Light Jet		LJ55	Learjet 55	Bombardier	Midsize Jet	
C560	Cessna Citation V	Cessna	Light Jet		LJ60	Learjet 60	Bombardier	Midsize Jet	
C56X	Cessna Citation Excel / XLS	Cessna	Light Jet		LJ70	Learjet 70	Bombardier	Midsize Jet	
C650	Cessna Citation III	Cessna	Midsize Jet		LJ75	Learjet 75	Bombardier	Midsize Jet	
C680	Cessna Citation Sovereign	Cessna	Midsize Jet		P180	Piaggio P180 Avanti	Piaggio Aerospace	Turboprop	
C750	Cessna Citation X	Cessna	Midsize Jet		PAY2	Piper Cheyenne 2	Piper Aircraft	Turboprop	
CL30	Challenger 300 series	Bombardier	Midsize Jet		PAY3	Piper Cheyenne 3	Piper Aircraft	Turboprop	
CL35	Challenger 350	Bombardier	Midsize Jet		PAY4	Piper Cheyenne 400	Piper Aircraft	Turboprop	
CL60	Challenger 600 series	Bombardier	Heavy Jet		PC12	Pilatus PC-12	Pilatus	Turboprop	
CRJ2	Challenger 800-850	Bombardier	Heavy Jet	ICAO flight type G only	PC24	Pilatus PC24	Pilatus	Light Jet	
E135	Embraer RJ135	Embraer	Heavy Jet	ICAO flight type G only	PRM1	Premier 1	Hawker Beechcraft	Light Jet	
E145	Embraer RJ145	Embraer	Heavy Jet	ICAO flight type G only	SBR1	Sabreliner	NA Rockwell	Light Jet	
E190	Embraer 190	Embraer	Bizliner	ICAO flight type G only	SBR2	Sabreliner	NA Rockwell	Light Jet	
E35L	Embraer Legacy 600 series	Embraer	Heavy Jet		SJ30	Syberjet SJ30	SyberJet	Light Jet	
E50P	Embraer Phenom 100	Embraer	Light Jet		TBM7	Socata TBM 700	Daher-Socata	Turboprop	
E545	Embraer Legacy 450 / Praetor 150	Embraer	Midsize Jet		TBM8	Socata TBM 850	Daher-Socata	Turboprop	
E550	Embraer Legacy 500	Embraer	Midsize Jet		TBM9	Socata TBM 900 series	Daher-Socata	Turboprop	
E55P	Embraer Phenom 300	Embraer	Light Jet	ICAO flight type G and N only	WW23	1123 Westwind	IAI	Midsize Jet	
E75L	Embraer RJ175	Embraer	Bizliner	ICAO flight type G only	WW24	1124 Westwind	IAI	Midsize Jet	
EA50	Eclipse 500	Eclipse	Light Jet		EA50	Eclipse 500	Eclipse	Light Jet	

DISCLAIMER

This report is provided by EBAA for information purposes only and no representation, warranties or other assurances, express or implied, are given as to the quality, accuracy, or completeness of the information contained in, or provided in connection with the report.

Recipients of this report must determine for themselves whether any matters referred to are suitable for their purposes. Neither EBAA nor any of their affiliates, agents, partners, representatives, consultants or any other company, firm or organisation involved in producing this report, nor any of their successors or assign or any employees, officer or director of any of them shall have any liability with respect to the use or reliance on the report by any person, irrespective of any negligence, omission or default, on the part of the foregoing persons.

Any reproduction or publication of this report, in whole or in part, is strictly forbidden without the written consent of EBAA. Please write to communications@ebaa.org for questions related to the use of this report.



For more information, please contact:

Square de Meeûs 37
BE - 1000 Brussels - Belgium

Phone: +32 2 318 28 00
Fax: +32 2 318 28 01

Follow us



@EUROPEANBUSINESSAVIATIONASSOCIATION



@EBAAORG



EUROPEAN BUSINESS AVIATION ASSOCIATION



@EUROPEAN_BUSINESS_AVIATION

www.ebaa.org

