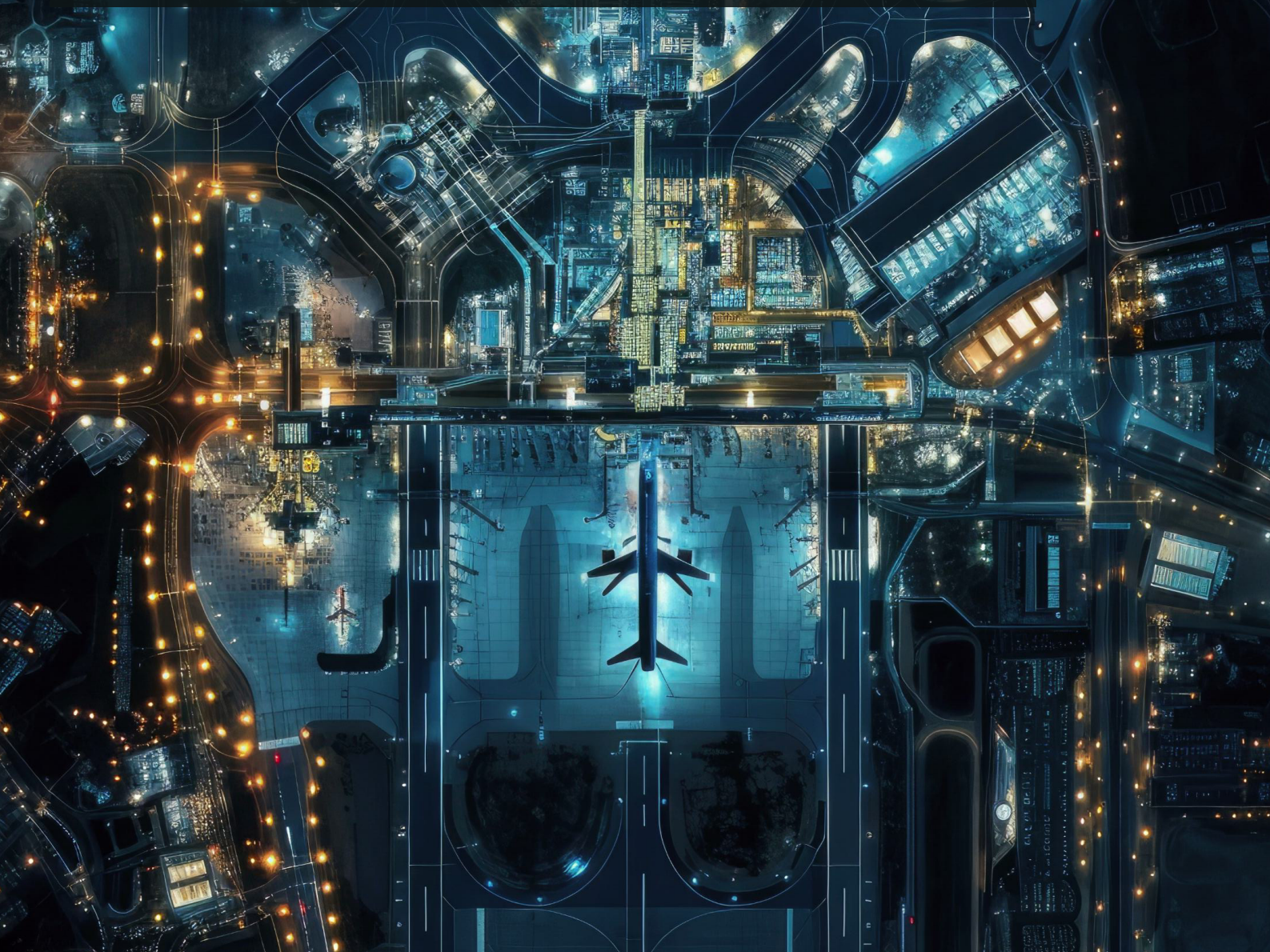
Situation Report:

Cyberattack and Disruption of European Airports



September 20, 2025

Prewave

Situation Report: Cyberattack And Disruption Of European Airports

Executive Summary

A cyberattack against Collins Aerospace's ARINC MUSE/cMUSE platform disrupted operations at London Heathrow (LHR), Brussels (BRU), and Berlin (BER) today.

This system is a common-use passenger processing service (CUPPS) used by multiple airlines for check-in, boarding, and baggage handling. Business Continuity fallback procedures (manual check-in/boarding) are in place, allowing flights to operate, but at significantly reduced throughput.

Direct supply chain impact is centered on belly cargo capacity, as passenger disruption translates directly into reduced freight uplift. Ripple effects are already visible, with forwarders shifting cargo to alternative hubs (Frankfurt, Amsterdam, Paris CDG) and freighter networks (Liège, Leipzig, Cologne, East Midlands).

If restored within 24 hours, expect short-term backlogs cleared within 1–3 days. A prolonged outage of 2–5 days would create material bottlenecks in European air cargo, especially for pharma, perishables, and high-value components.

Direct Impacts

London Heathrow (LHR)

- **Europe's largest cargo hub** by value (~1.58m tonnes/year).
- ~95% of freight is in passenger aircraft bellies, making passenger flow critical for cargo capacity.
- **Current situation:** delays, queues, slower processing. Even a 10–15% reduction in departures equates to 400–650 tonnes/day of lost capacity.

Exposed Cargo:

- High-value electronics & luxury goods (big share of UK exports by value routed via LHR)
- Pharmaceuticals & healthcare (regular temperature-controlled flows in bellies)
- Critical spares (AOG), aerospace/auto components (time-sensitive, often booked in bellies for speed)
- Perishables & live animals (Heathrow uniquely handles all animal species; perishables need tight schedules)

Brussels (BRU)

- **Cargo volume** ~733k tonnes/year.
- **Specialization:** top pharma cluster in europe (Brucargo), e-commerce logistics, DHL hub presence.
- **Reported impact:** 10 cancellations, ~15–17 delays. Passenger belly freight is affected, but integrator/freighter operations continue, cushioning overall cargo flows.

Exposed Cargo:

- Temperature-controlled pharmaceuticals & clinical supplies (tight cold-chain SLAs).
- E-commerce parcels riding belly space (integrators on freighters OK, but merchant/marketplace flows using pax capacity can slip).
- Perishables/live animals handled via BRU's ACIC facilities, if booked on passenger services.

Berlin (BER)

- **Smaller role:** ~44k tonnes/year, ≈120 tonnes/day.
- Passenger disruption visible, but minimal systemic cargo impact.
- General belly cargo—electronics, fashion, small industrials—booked on BER pax departures (missed uplift likely rerouted by truck to FRA/LEJ/CGN)

Potential Ripple Effects

Alternative Airports (Immediate Relief Valves)

- Frankfurt (FRA): Unaffected, primary diversion target.
- Amsterdam (AMS) & Paris CDG: High-capacity EU hubs ready to absorb belly freight.
- Liège (LGG), Leipzig (LEJ), Cologne (CGN), East Midlands (EMA): Integrator hubs (DHL, UPS, FedEx) with freighter elasticity to absorb overflow.

Commodities Most Exposed

- Pharmaceuticals: Temperature-sensitive flows via BRU may face re-routing, risking shelf life and added complexity.
- Perishables: Fresh produce and seafood, typically routed via LHR belly capacity, may face short delays.
- High-Value Electronics & Spare Parts: Just-in-time supply chains (automotive, aerospace) risk slippage if delays persist beyond 48h.

Ground Handlers

- Swissport, Menzies, dnata must divert staff from cargo to manual passenger processing, creating further throughput constraints on cargo handling.

Scenario Outlook

Scenario A: Restoration within 24h (Most Likely)	**Scenario B: 24–48h Outage**	**Scenario C: 3–5 Day Outage (Tail Risk)**
• **5–15%** belly capacity loss at LHR/BRU. • Backlog clearance: **1–3 days**, manageable via surge flights, freighter substitution, and trucking to FRA/AMS/CDG.	• **15–30%** capacity loss across LHR/BRU. • Backlog clearance: **2–4 days**. Increased reliance on freighter/integrator networks. • Spot rate volatility on freighter lanes expected.	• **30–50%** capacity degradation at LHR/BRU. • Backlog clearance: **4–7 days** post-restoration. • Significant ripple effects across Europe, pressure on freighter hubs, rising rates for pharma/e-commerce flows.

Conclusion

The cyberattack on Collins Aerospace's cMUSE platform demonstrates how a single third-party IT dependency can ripple through critical aviation hubs and directly constrain European supply chains. Immediate impacts are concentrated on belly cargo at LHR and BRU, exposing pharmaceuticals, perishables, high-value electronics, and time-critical components to delays.

While manual fallback procedures have kept flights moving, throughput reductions create backlogs that may take days to clear, depending on the duration of the outage. Integrator and freighter networks provide important relief, but forwarders and manufacturers should act now: confirm CUPPS dependencies at their key airports, pre-book freighter capacity, and activate diversion playbooks.