



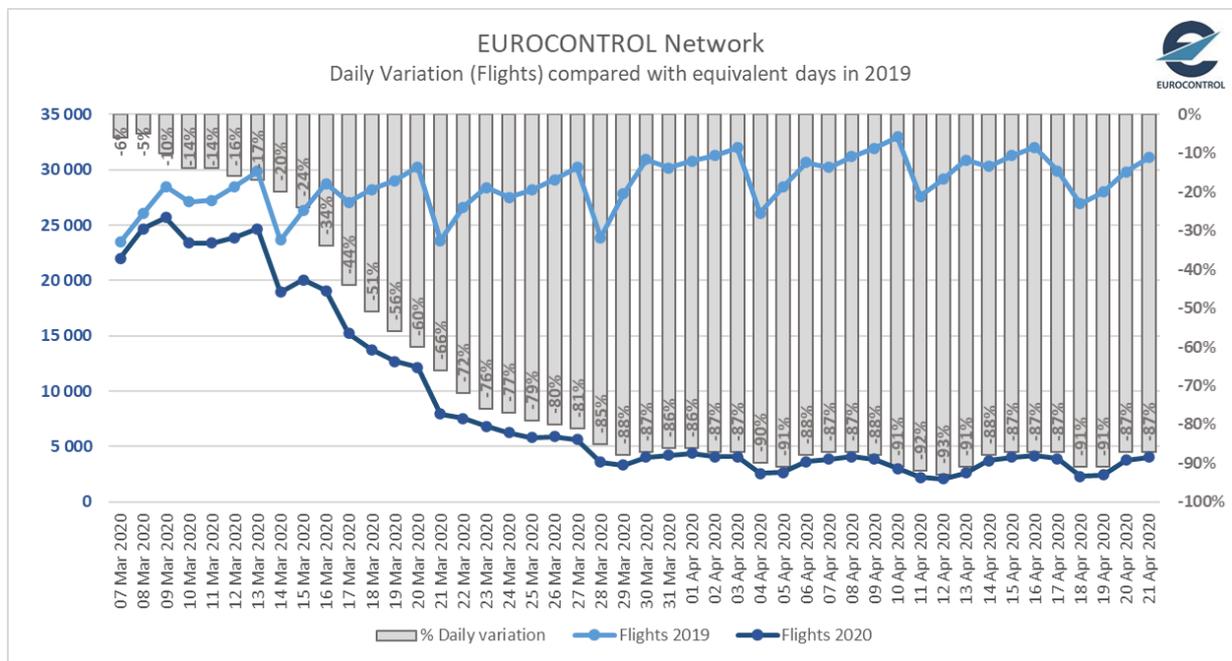
COVID19 Impact on European Air Traffic EUROCONTROL Comprehensive Assessment

Air Traffic situation: Tue 21 April & mid-Week 17 (20-21 April) (compared with equivalent period in 2019)

1. Summary points on the network situation:

- **NM Network flights Tue 21 April: 4,033 flights -87.0% (27,050 fewer flights)**
 - The 'deficit' since 01 March 2020 totals 917,054 flights and will exceed 1 million on Friday 24 April.
 - Of the fixed wing operators DHL Express was the busiest with 253 movements, followed by Widerøe (204), Turkish Airlines (103) and Lufthansa (96).
 - Bristow Norway AS which transports crew to oil installations in the North Sea operated 94 flights, mostly from Bergen and Stavanger.
 - Frankfurt was the busiest airport with 200 movements, followed by Leipzig (179), Oslo-Gardermoen (179), Schiphol (166) and Heathrow (156).
 - No Rapid Air Mobility flights, the intended operation we were notified of did not take place.

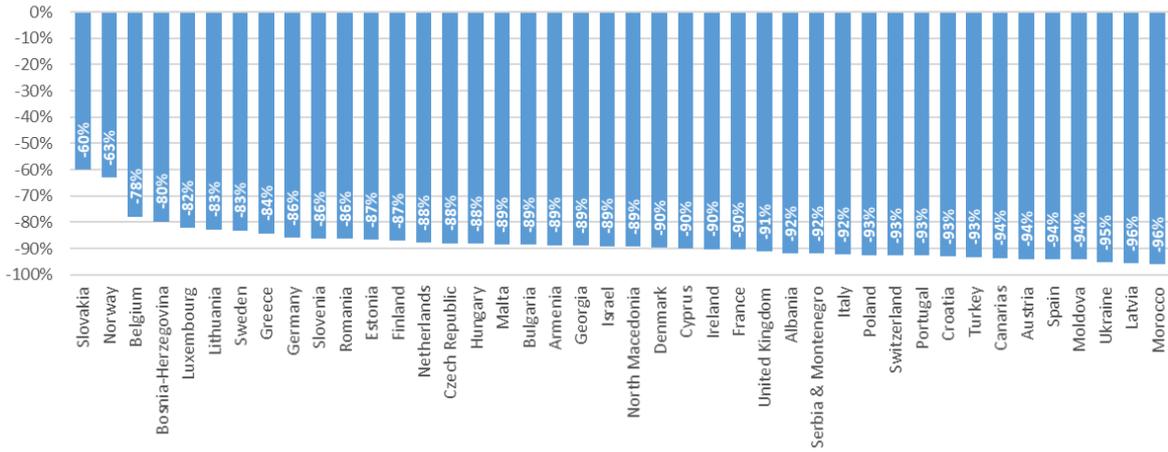
- **Mid-Week #17 (20-21 April): 3,914 flights (daily avg) -87.1% (53,043 fewer flights)**



States in EUROCONTROL Network

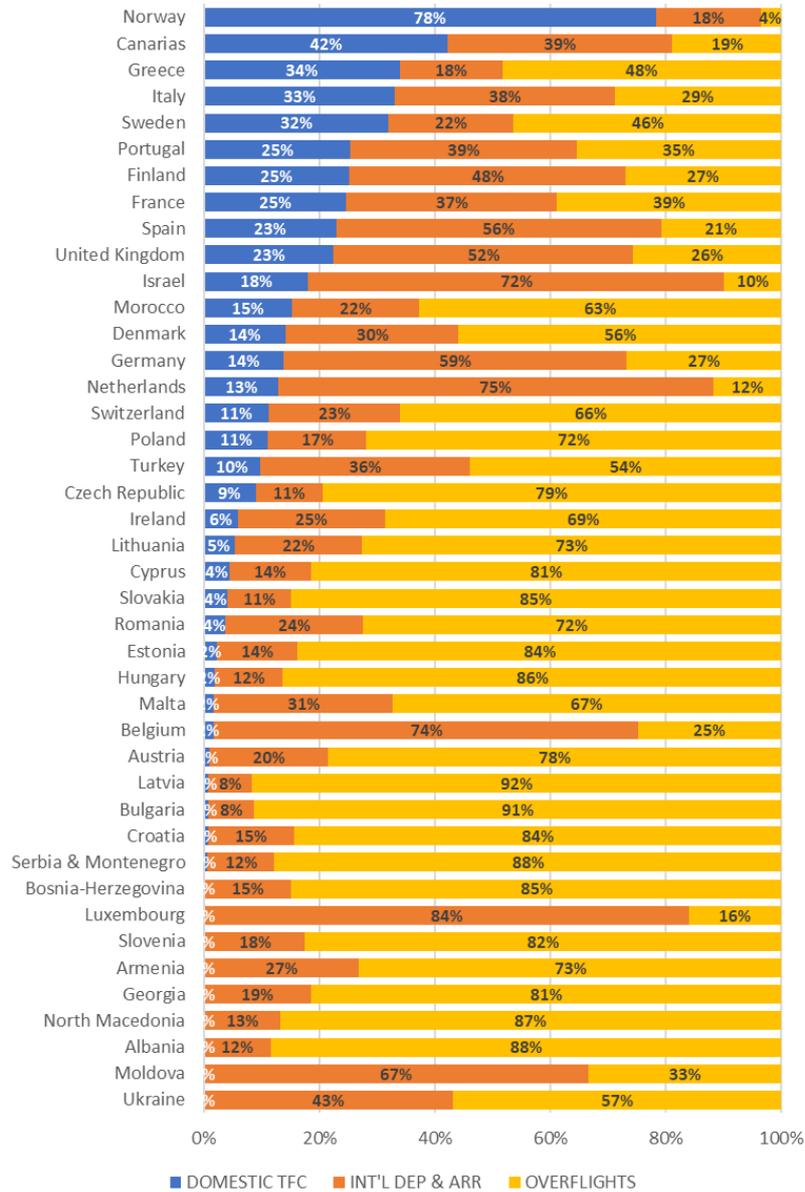
(compared with equivalent days in 2019)

Daily Variation (IFR Dep/Arr Flights) - Tue 21 Apr 2020



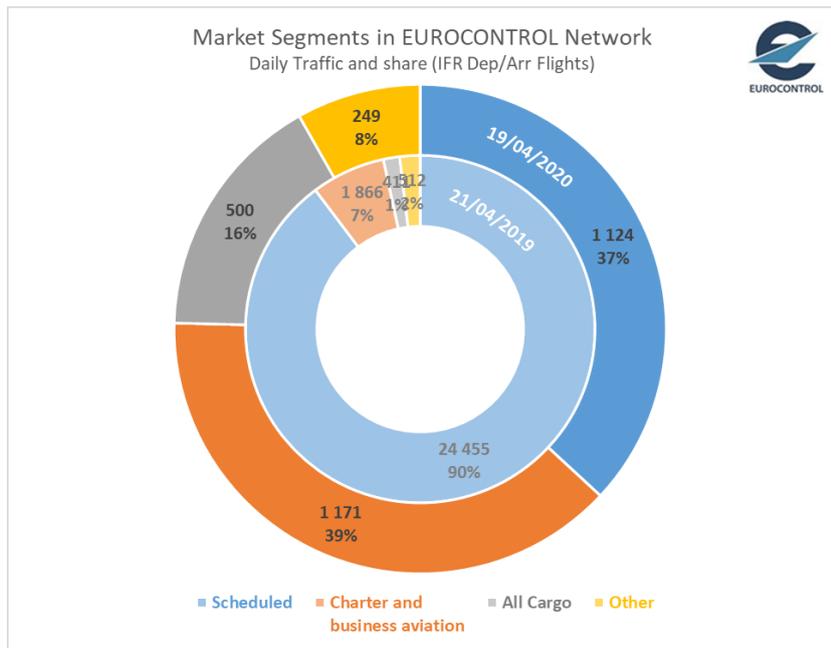
Daily structure of traffic

Tue 21 April 2020

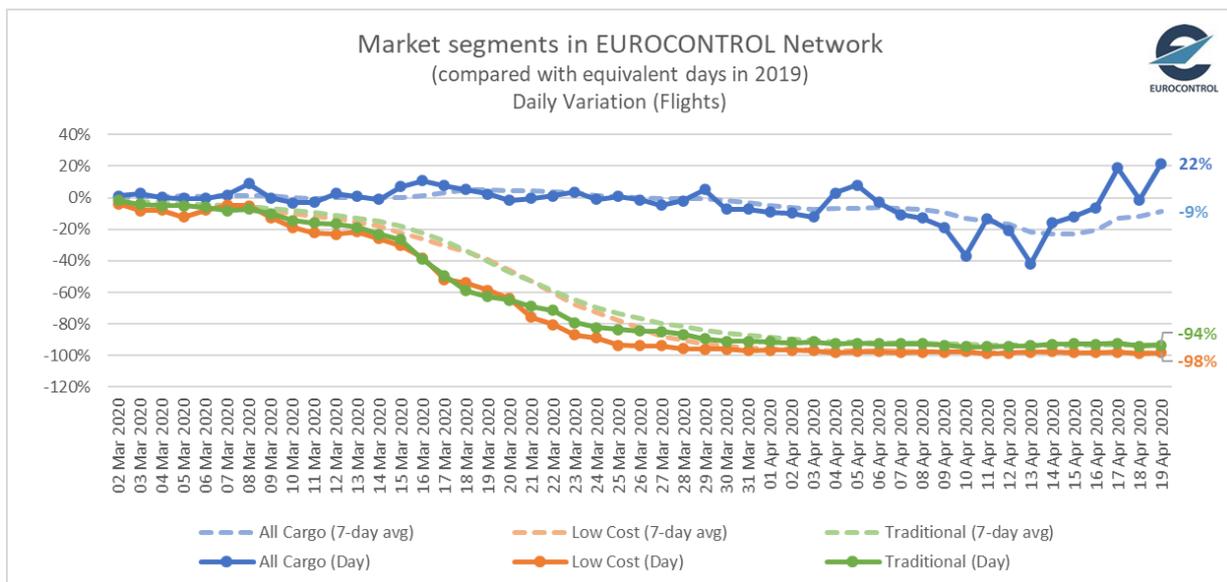


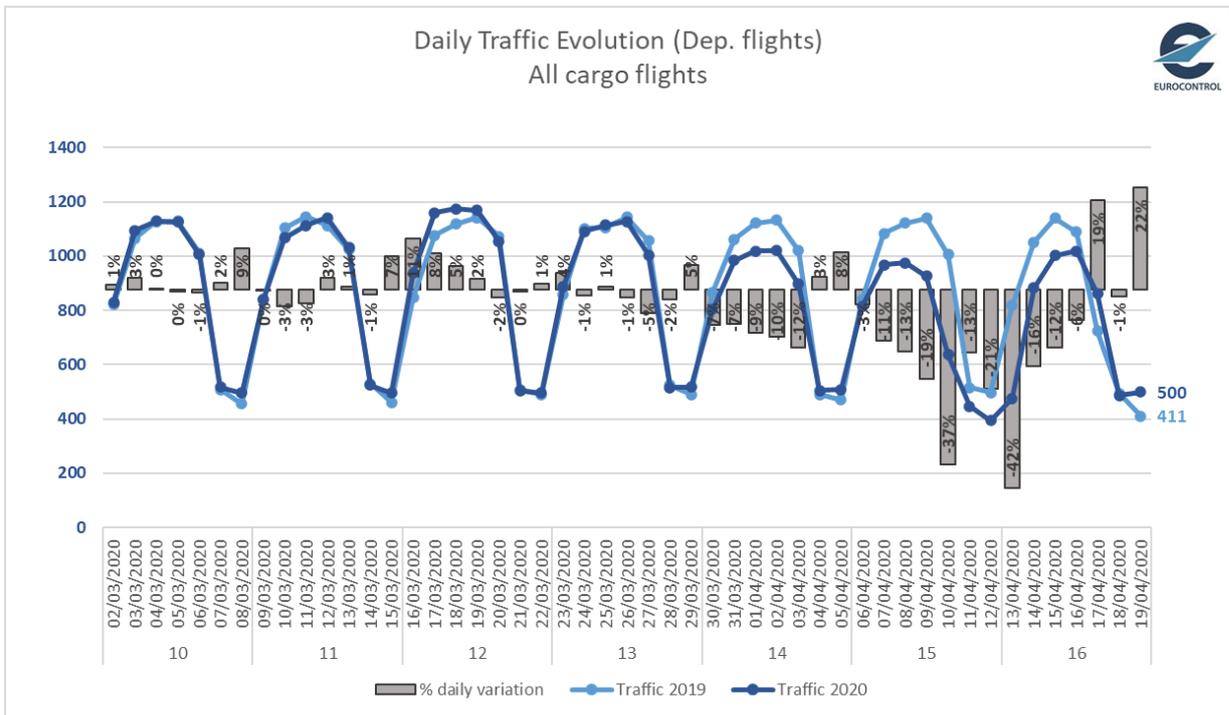
2. Market Segments (Up to 19 April 2020)

- As per the chart on the right-hand side, this time last year, all-cargo flights accounted for about 1% of total Departure / Arrival flights, whereas now, it accounted for 16% on Sunday 19 April 2020.
- The share of scheduled traffic which accounted for 90% reduced to 37% only.
- It must however be noted that it was Easter on 21 April 2019.

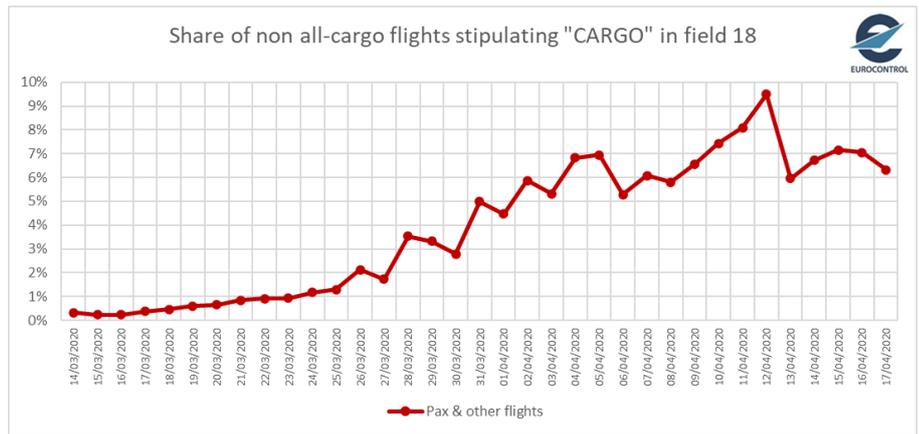


- As per the chart below, it appears clearly that all-cargo flights remained close to the 2019 level until recently while scheduled and low-cost traffic reduced by 94% (respectively 98%) during the crisis.
- The recent reduction evident in the last few days of all-cargo (e.g. -9% as an average over the last 7 days before 19 April), is related to the Easter period (which occurred on 21 April 2019 last year), as a similar patterns have been noted over the last few years. Overall, as an average over 7 days, all cargo reduced by 9% compared to 2019.

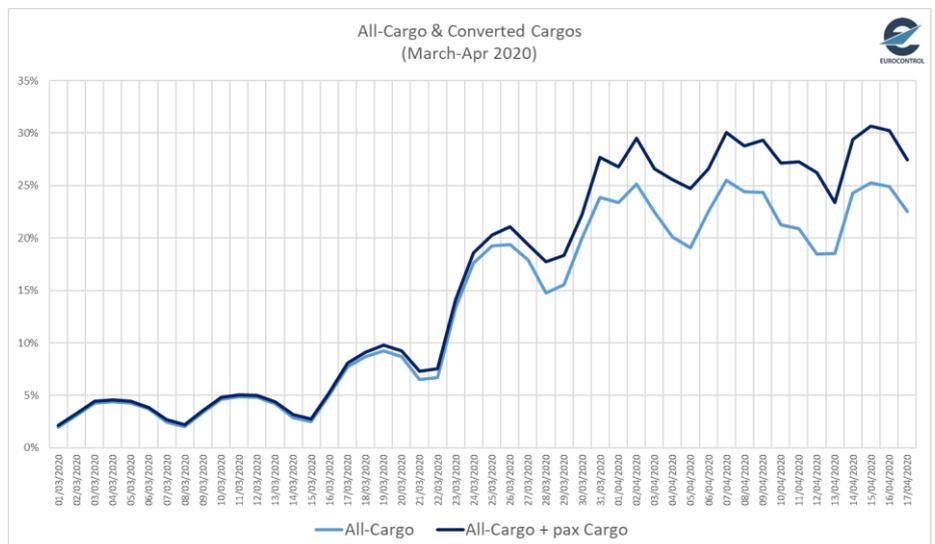




- The previous charts were showing all cargo flights. However, since the beginning of this crisis, we have seen some pax and other aircraft being used purely for cargo. While being difficult to estimate, a statistical analysis using the word "CARGO" in field 18 of the flight plan provides some useful information as shown on the chart on the right-hand side. Over the very recent days, the share increased to reach 9.5% on 12 April to stabilize at around 7%, the latter value including the Easter effect.

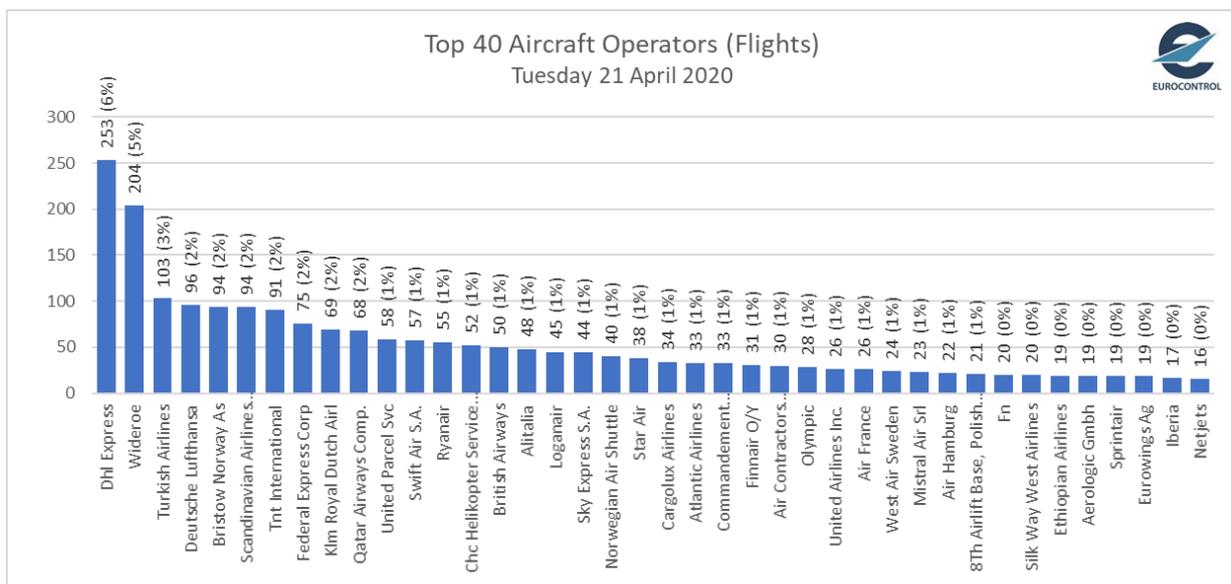


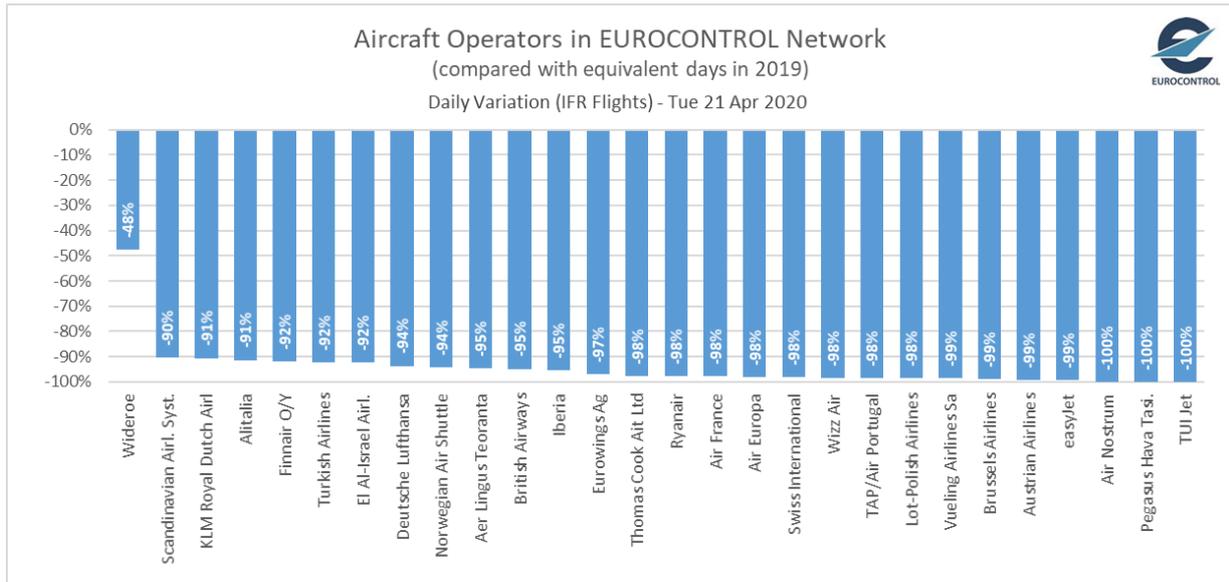
- The chart on the right-hand side show a growing number of cargo flights in passenger & other non-cargo aircraft. The total share has slightly increased to 27.8% (from 27.4% during the week prior Easter). The average delta between the two line continues to increase: it was 5pp before Easter and 5.7pp during the Easter week.



3. Airlines

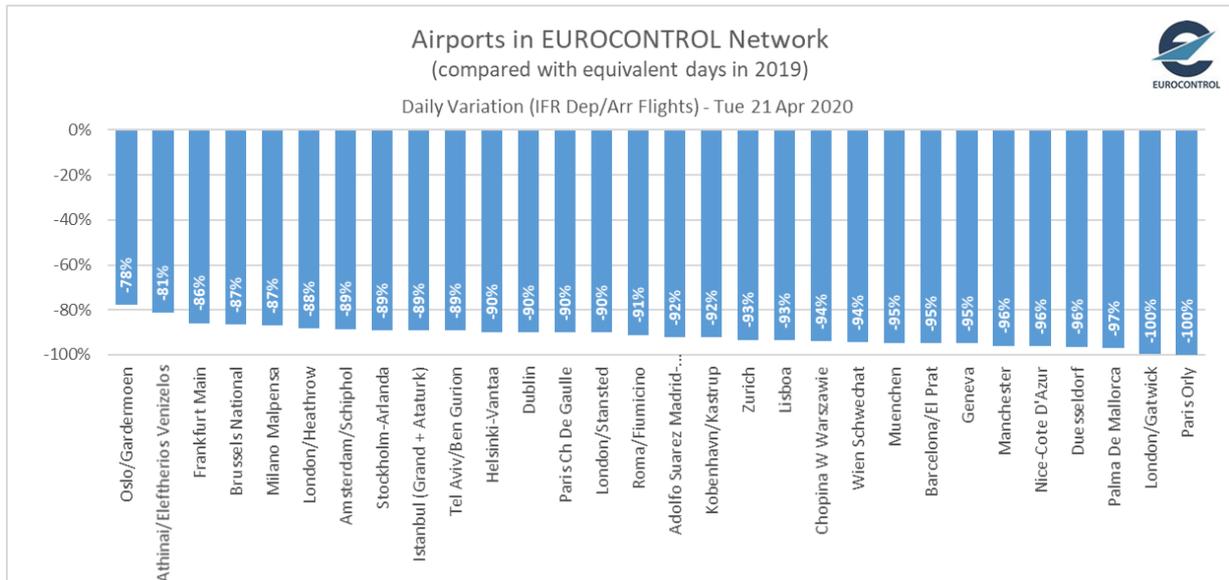
- For the largest Air Operator Groups, the reductions on Tuesday 21 April were: easyJet -99.3%, Ryanair Group -97.8%, IAG Airlines -96.4%, Air-France-KLM -95.6% and Lufthansa Group -95.0%.
- On Tuesday 21 April TUI Jet, Pegasus and Air Nostrum had no operations at all, whilst easyJet, Austrian Airlines, Brussels Airlines and Vueling were -99% with just a few flights. LOT, TAP/Air Portugal and SAS were -98%, Air France and Ryanair -98%, Iberia and British Airways -95%, Lufthansa -94% and KLM -91%.
- DHL Express was the busiest Airline with 253 movements, followed by Widerøe (204), Turkish airlines (103), Lufthansa (96), Bristow Norway and SAS (94), TNT international (91), FEDEX (75), KLLM (69) and Qatar Airways (68).

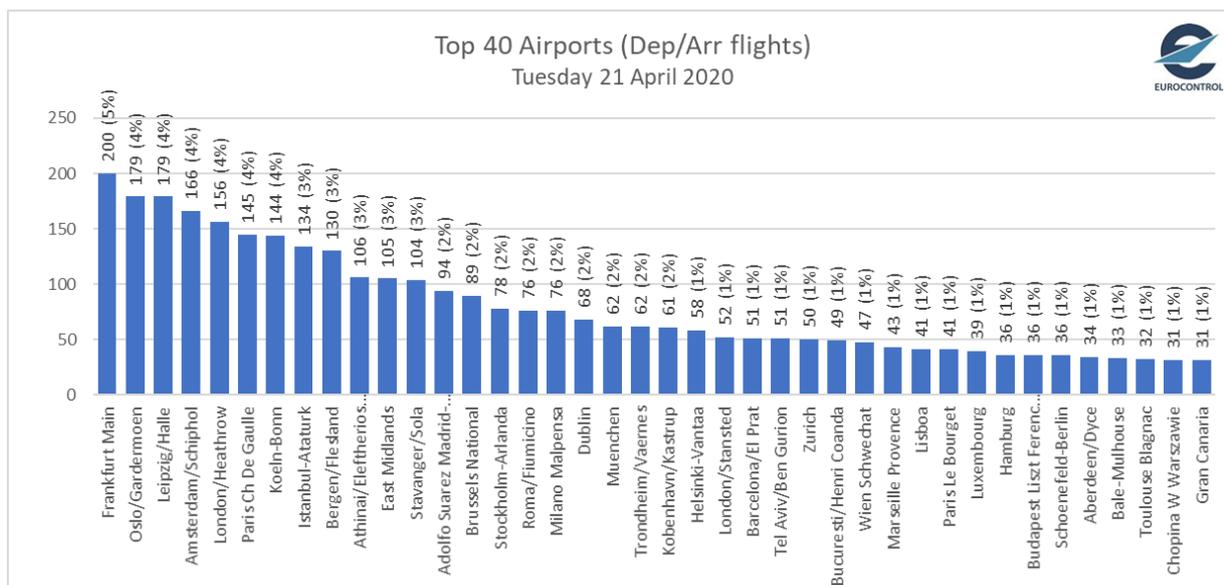




4. Airports:

- On Tuesday 21 April, virtually all of Europe's largest airports are now managing 90% fewer flights compared to last year, examples: Paris Orly and London Gatwick were -100%, Munich -95%, Vienna -94%, Madrid -92%, Paris CDG -90%, Dublin -90%, Istanbul -89%, Amsterdam -89%, London Heathrow -88%, Milan Malpensa -87%, and Frankfurt -86%, Athens -81% and Oslo -78%.
- On Tuesday 21 April, Frankfurt was the busiest airport with 200 movements, followed by Oslo Gardermoen and Leipzig (179), Amsterdam (166), London/Heathrow (156) and Paris CDG (145).





To further assist you in your analysis, EUROCONTROL provides the following additional information on a daily basis (daily updates at approximately 12:00 CET):

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 will provide 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 public Network Operations Portal (NOP) under “Latest News” will be updated daily with a summary table of the most significant COVID-19 NOTAMS applicable at 12.00 UTC.

