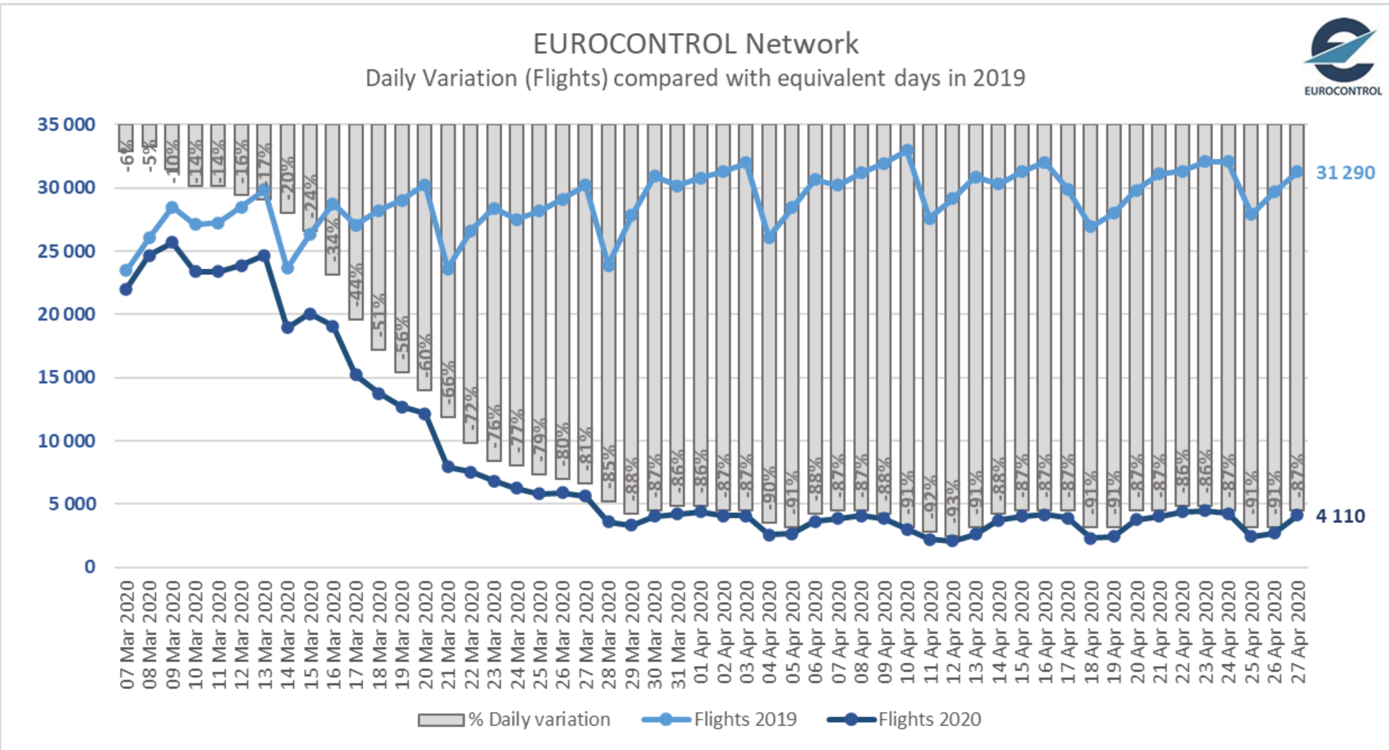
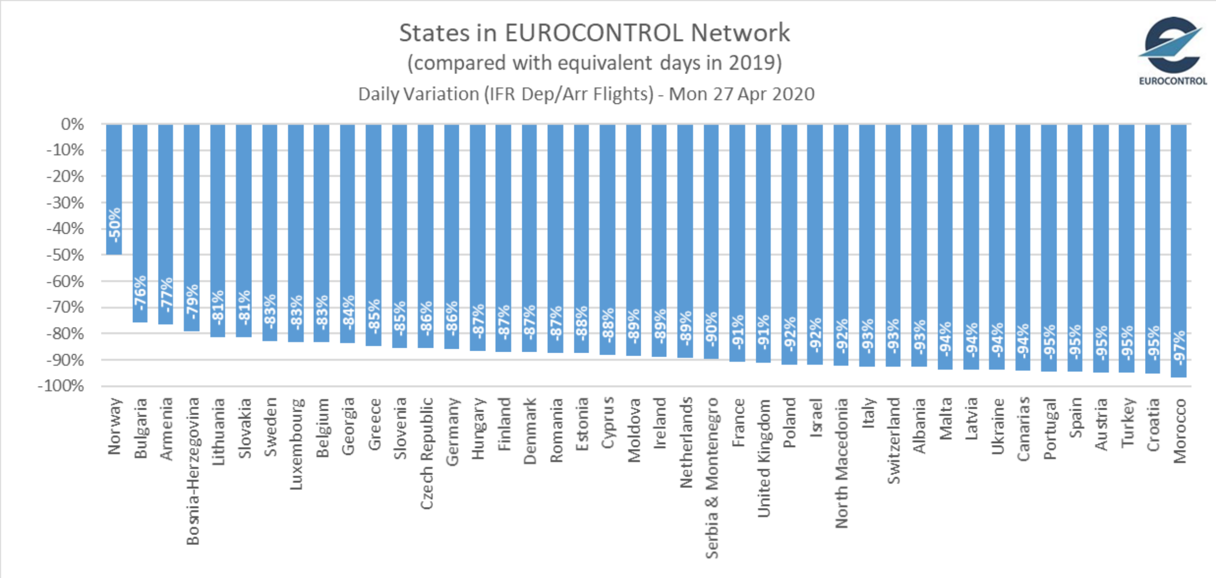
COVID19 Impact on European Air Traffic
EUROCONTROL Comprehensive Assessment

Air Traffic situation: Mon 27 April & Week 17 (20-26 April) (compared with equivalent period in 2019)

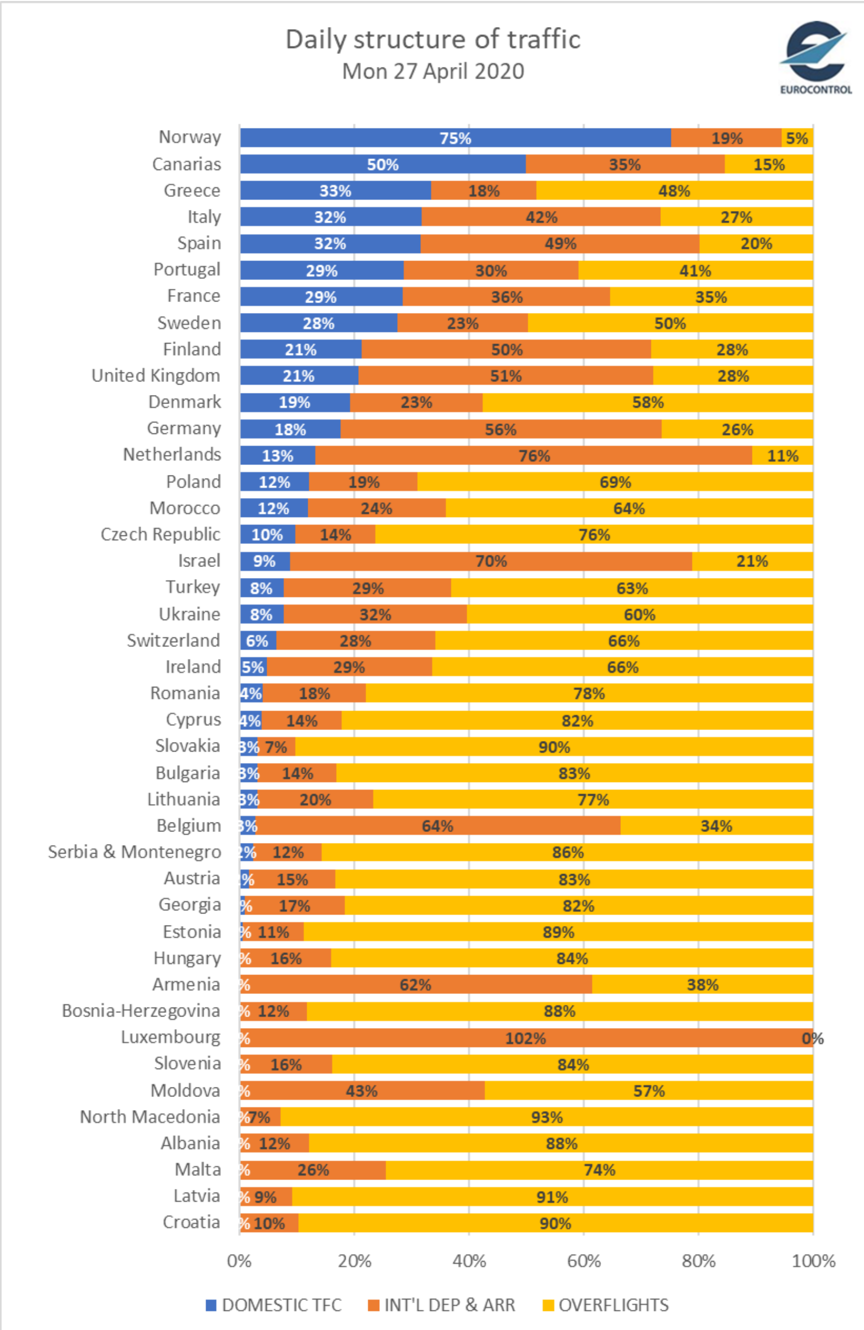
1. Summary points on the network situation:

- **NM Network flights Mon 27 April: 4,110 flights** **-86.9%** (**27,180** fewer flights)
- **Week #17 (20-26 April): 3,734 flights (daily avg)** **-87.8%** (**187,759** fewer flights)
  - Saturday was the quietest day of the week with 2,467 flights.
  - The 'deficit' since 01 March 2020 totals 1,051,770 flights.
  - DHL Express was the busiest operator with an average of 189 movements per day, followed by Widerøe (161), Turkish Airlines (109), Lufthansa (104), and Qatar (83).
  - Averaged across the week, Frankfurt was the busiest airport with an average of 230 movements per day followed by Heathrow (177), Schiphol (164), Oslo (152) and Leipzig (150).
  - As an average over 7 days, all cargo increased by 5% compared to 2019.





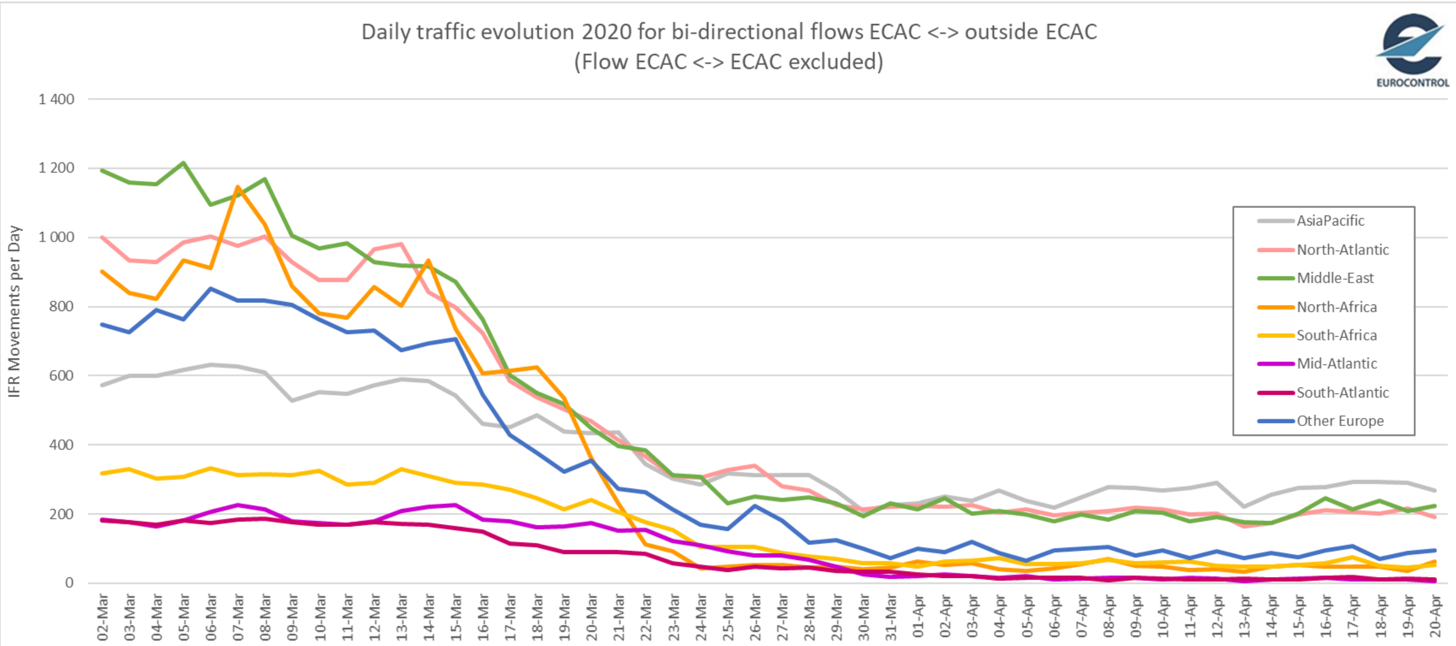
States in EUROCONTROL Network
(compared with equivalent days in 2019)
Daily Variation (IFR Dep/Arr Flights) - Mon 27 Apr 2020
EUROCONTROL
0%
-10%
-20%
-30%
-40%
-50%
-60%
-70%
-80%
-90%
-100%
Norway -50%
Bulgaria -76%
Armenia -77%
Bosnia-Herzegovina -79%
Lithuania -81%
Slovakia -81%
Sweden -83%
Luxembourg -83%
Belgium -83%
Georgia -84%
Greece -85%
Slovenia -85%
Czech Republic -86%
Germany -86%
Hungary -87%
Finland -87%
Denmark -87%
Romania -87%
Estonia -88%
Cyprus -88%
Moldova -89%
Ireland -89%
Netherlands -89%
Serbia & Montenegro -90%
France -91%
United Kingdom -91%
Poland -92%
Israel -92%
North Macedonia -92%
Italy -93%
Switzerland -93%
Albania -93%
Malta -94%
Latvia -94%
Ukraine -94%
Canarias -94%
Portugal -95%
Spain -95%
Austria -95%
Turkey -95%
Croatia -95%
Morocco -97%

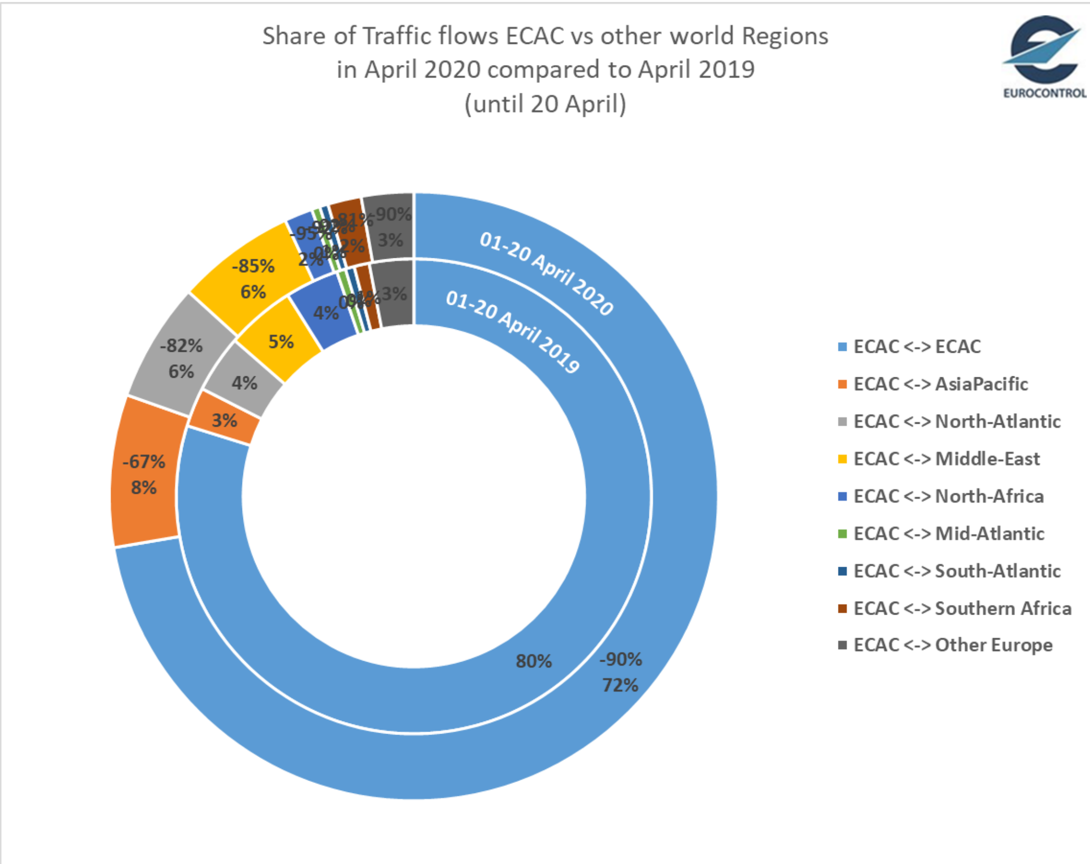


Daily structure of traffic
Mon 27 April 2020
EUROCONTROL
Norway 75% 19% 5%
Canarias 50% 35% 15%
Greece 33% 18% 48%
Italy 32% 42% 27%
Spain 32% 49% 20%
Portugal 29% 30% 41%
France 29% 36% 35%
Sweden 28% 23% 50%
Finland 21% 50% 28%
United Kingdom 21% 51% 28%
Denmark 19% 23% 58%
Germany 18% 56% 26%
Netherlands 13% 76% 11%
Poland 12% 19% 69%
Morocco 12% 24% 64%
Czech Republic 10% 14% 76%
Israel 9% 70% 21%
Turkey 8% 29% 63%
Ukraine 8% 32% 60%
Switzerland 6% 28% 66%
Ireland 5% 29% 66%
Romania 4% 18% 78%
Cyprus 4% 14% 82%
Slovakia 3% 7% 90%
Bulgaria 3% 14% 83%
Lithuania 3% 20% 77%
Belgium 3% 64% 34%
Serbia & Montenegro 2% 12% 86%
Austria % 15% 83%
Georgia % 17% 82%
Estonia % 11% 89%
Hungary % 16% 84%
Armenia % 62% 38%
Bosnia-Herzegovina % 12% 88%
Luxembourg % 102% 0%
Slovenia % 16% 84%
Moldova % 43% 57%
North Macedonia % 7% 93%
Albania % 12% 88%
Malta % 26% 74%
Latvia % 9% 91%
Croatia % 10% 90%
0%
20%
40%
60%
80%
100%
DOMESTIC TFC
INT'L DEP & ARR
OVERFLIGHTS

2. ECAC – Worldwide Regions Traffic:

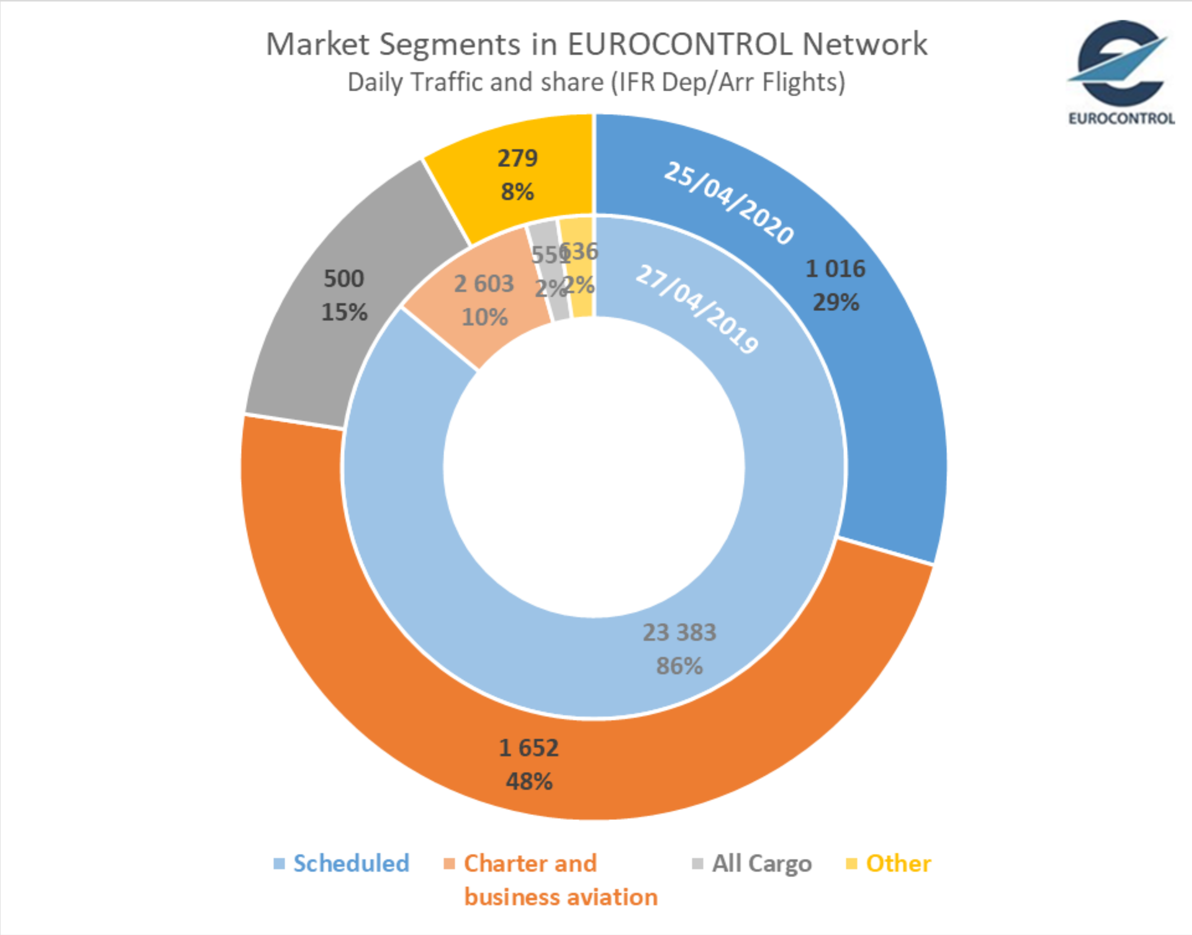
- Since the beginning of March, all bi-directional traffic flows between ECAC and other regions in the world have decreased with various dynamics and amplitude: the flow with Asia/Pacific is now the largest share of traffic to/from ECAC at 6%, but this is down 82% on last year.
- From 1 till 20 April 2020, the flow intra ECAC (within) reduced by 90% compared to April 2019 but its share reduced only slightly from 80% to 72% and remained by far the largest flow. The flow to/from Asia/Pacific reduced by 67% but is now the second largest flow with 8% of the total flows compared to 3% in 2019. The flow to/from Middle-East (respectively North Atlantic) which was the 2nd flow in 2019 (resp. the 3rd) has reduced by more than 80% and represents now 6% of all the flows.



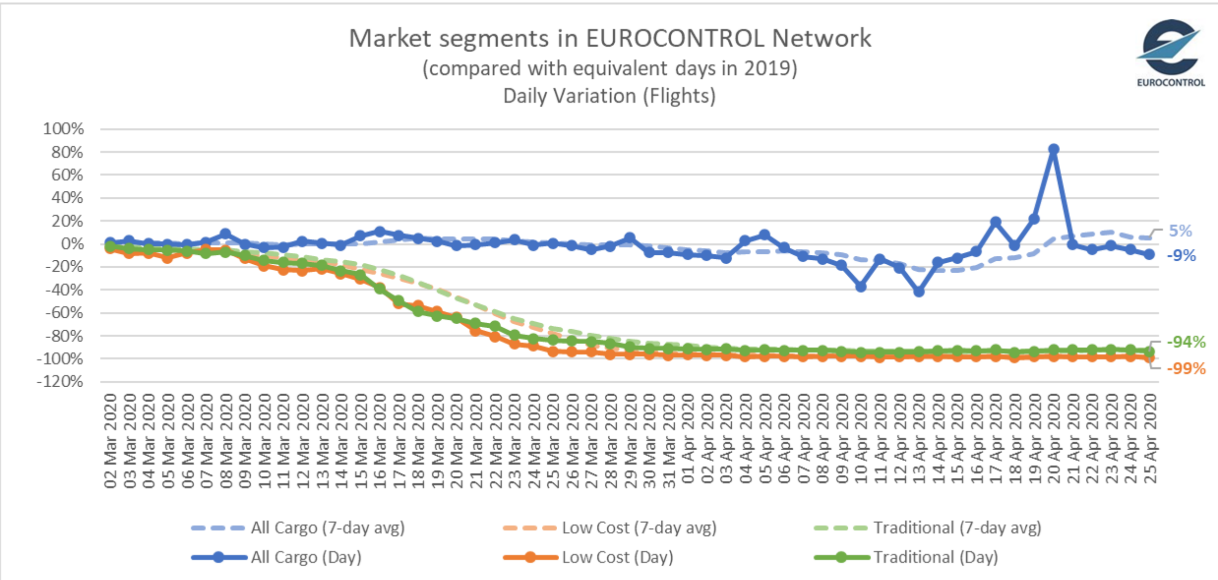


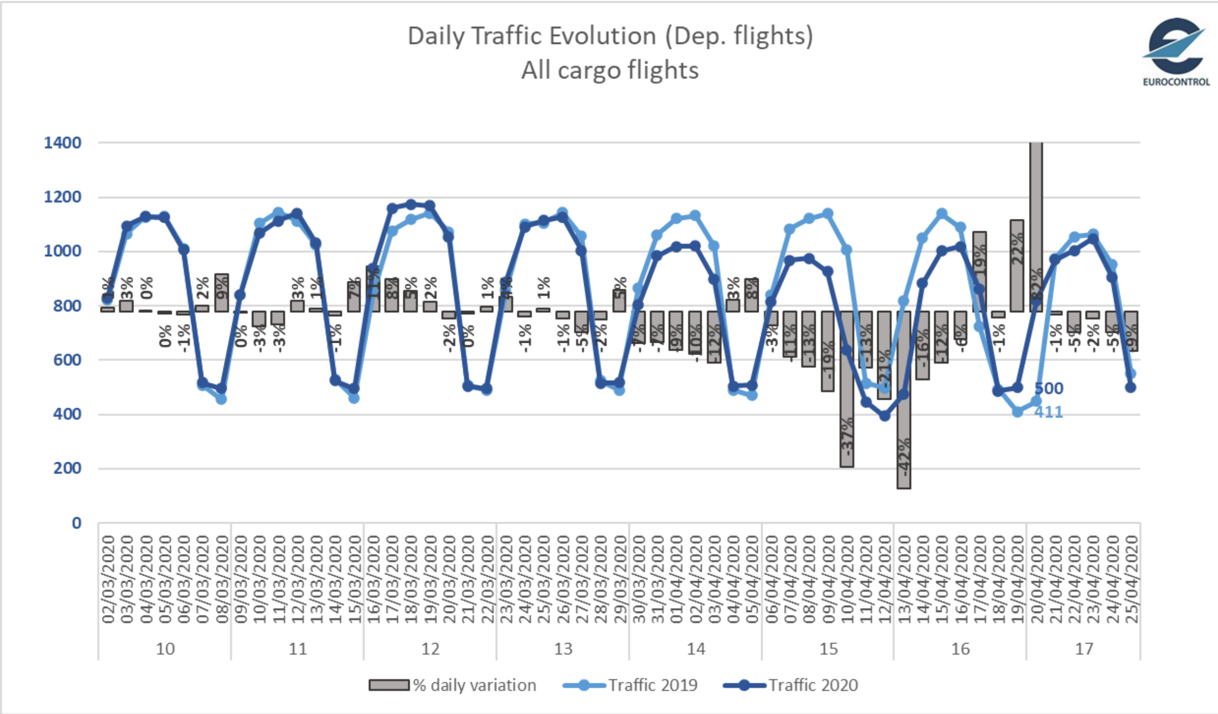
3. Market Segments (Up to 25 April 2020)

- This time last year, all-cargo flights accounted for about 2% of total Departure / Arrival flights, whereas now, it accounted for 15% on Saturday 25 April 2020. The share of scheduled traffic which accounted for 86% reduced to 29% only.

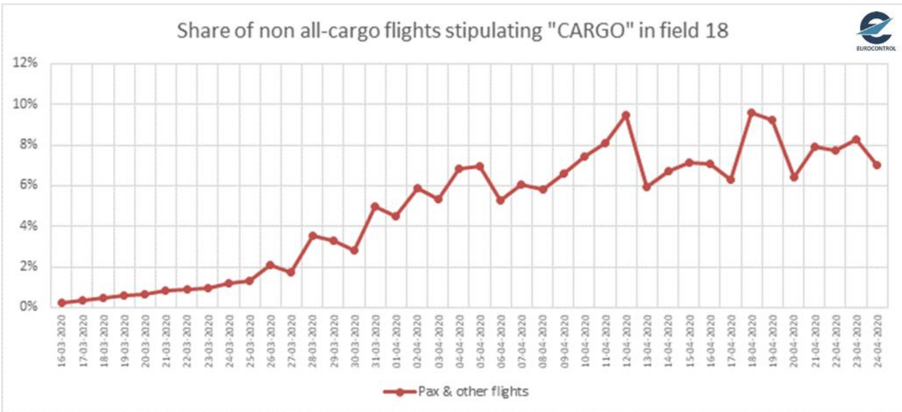


- As per the chart below, it appears clear that all-cargo flights remained close to the 2019 level with a variation around the Easter period (both 2019 and 2020) while scheduled and low-cost traffic reduced by 94% (respectively 99%) during the crisis. Overall, as an average over 7 days, all cargo increased by 5% compared to 2019.

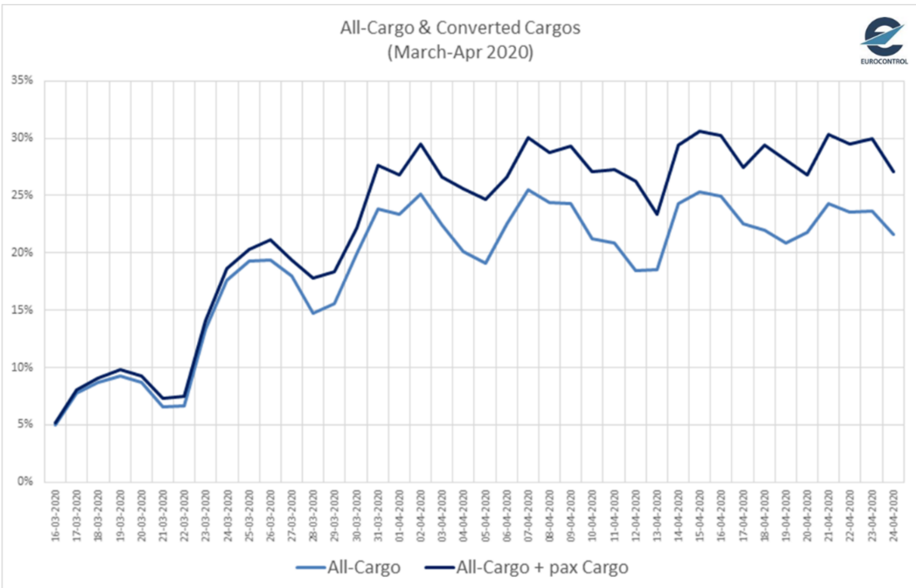




- The previous charts were showing all cargo flights. However, since the beginning of this crisis, we have seen some pax and other aircraft being used purely for cargo. While being difficult to estimate, a statistical analysis using the word "CARGO" in field 18 of the flight plan provides some useful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

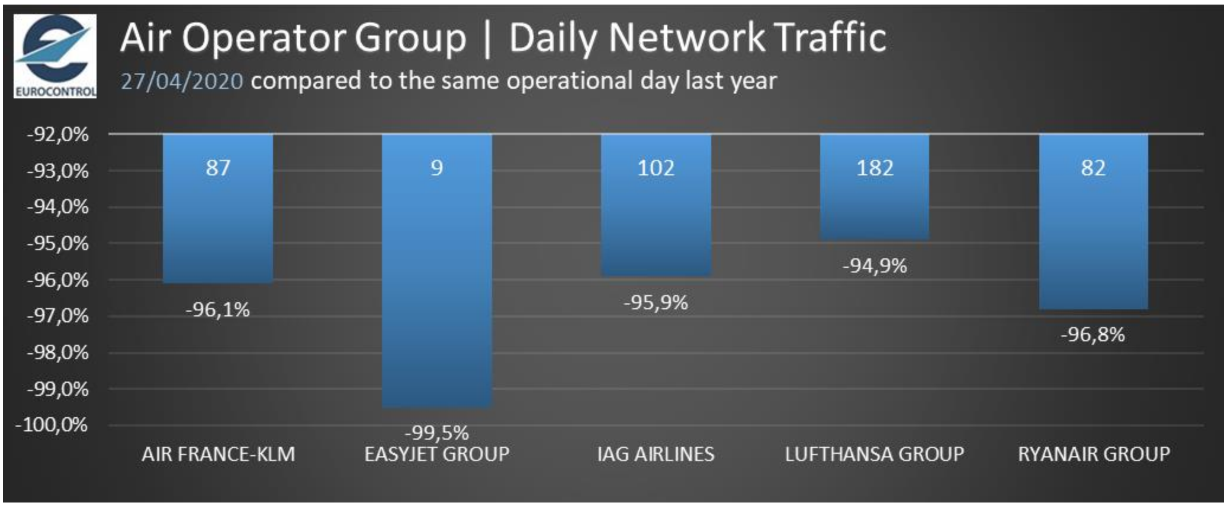


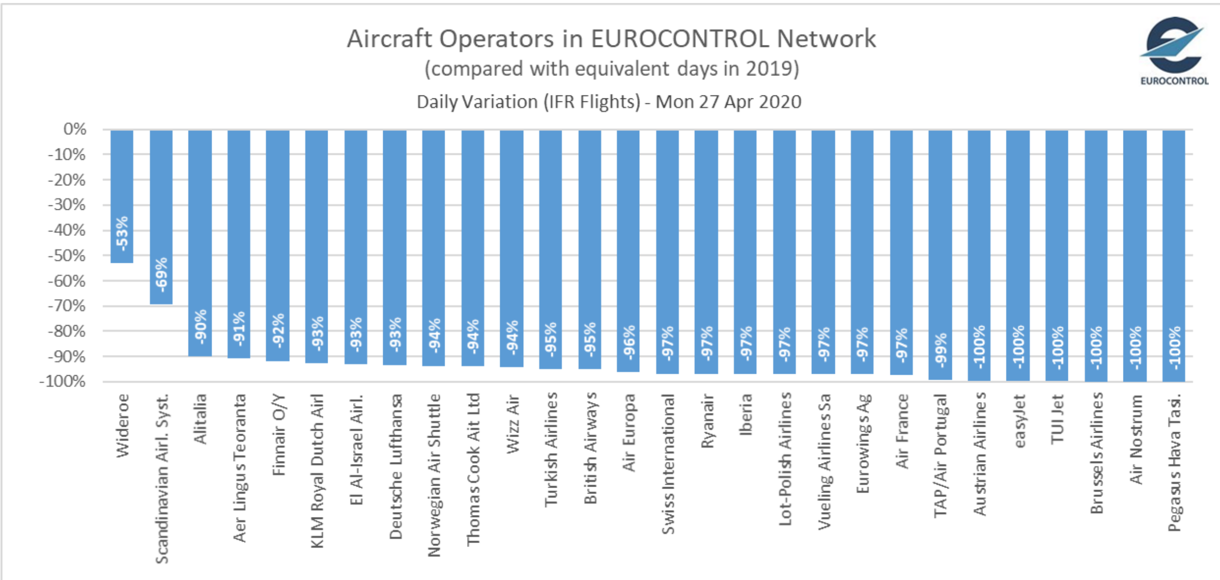
- The chart on the right-hand side show a growing number of cargo flights in passenger & other non-cargo aircraft. The "spread" between the two lines "all-cargo" and "all-cargo + pax cargo" remains stable at around 6 percentage points on average, stable over the last 7 days.

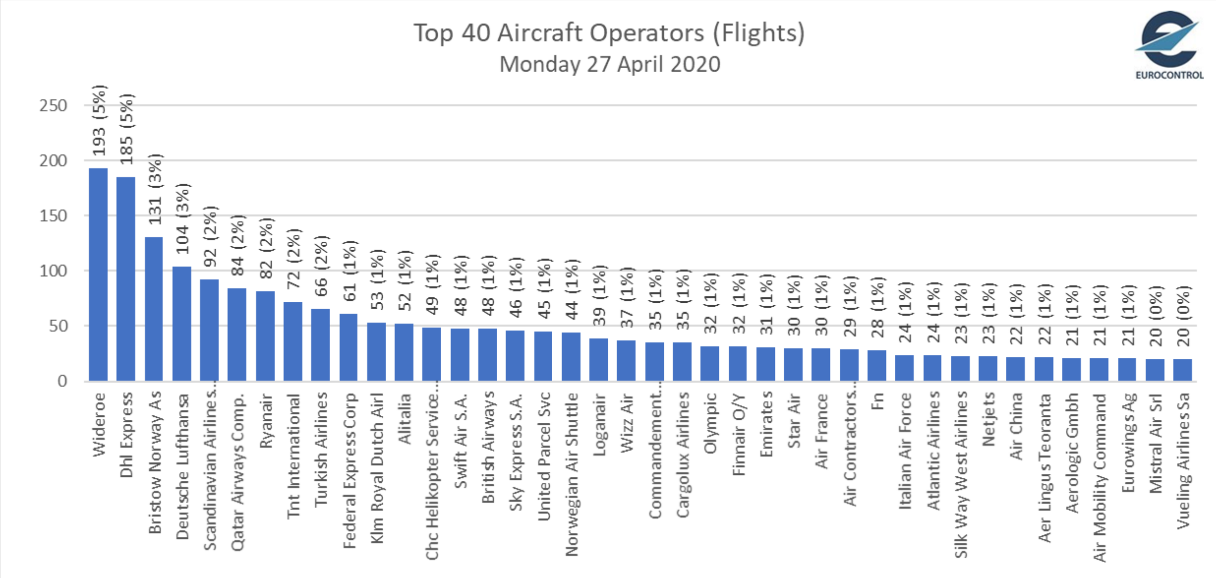


4. Airlines

- For the largest Air Operator Groups, the reductions on Monday 27 April were: easyJet -99.5%, Ryanair Group -96.8%, Air-France-KLM -96.1%, IAG Airlines -95,9%, and Lufthansa Group -94.9%.
- On Monday 27 April, Air Nostrum, Pegasus and Brussels Airlines had no operations at all, whilst TUI Jet, easyJet, Austrian Airlines and TAP/Air Portugal had almost no operations. Air France, Vueling, LOT, Iberia, Swiss and Ryanair were -97%, Turkish airlines and British Airways -95%, Lufthansa and KLM -93%, SAS were -69%.
- Widerøe was the busiest Airline with 193 movements, followed by DHL Express (185), Bristow Norway (131), Lufthansa (104), SAS (92), Qatar Airways (84), Ryanair (82), TNT international (72), Turkish airlines (66), FEDEX (61) and KLM (53).

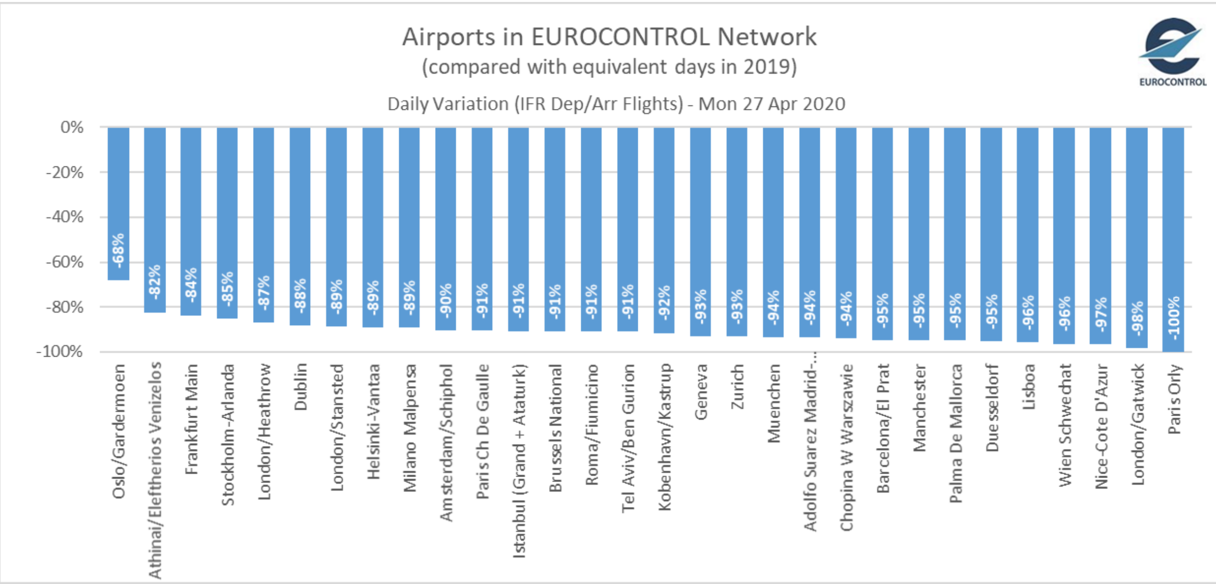


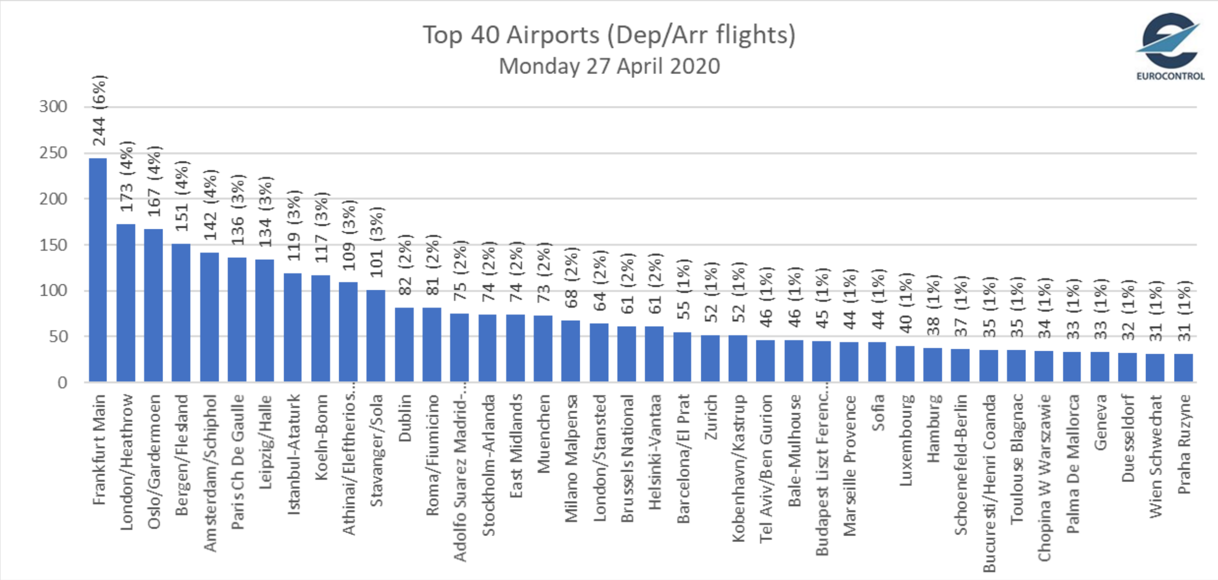




5. Airports:

- On Monday 27 April, virtually all of Europe's largest airports are now managing 90% fewer flights compared to last year, examples: Paris Orly had no flights, London Gatwick -98%, Vienna -96%, Munich -95%, Madrid -94%, Istanbul -91%, Paris CDG -91%, Amsterdam -90%, Milan Malpensa -89%, Dublin -88%, London Heathrow -87%, Frankfurt -84%, Athens -82% and Oslo -68%.
- On Monday 27 April, Frankfurt was the busiest airport with 244 movements, followed by London/Heathrow (173), Oslo Gardermoen (167), Bergen (151), Amsterdam (142), Paris CDG(136), Leipzig (134) and Istanbul (119).





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

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.