



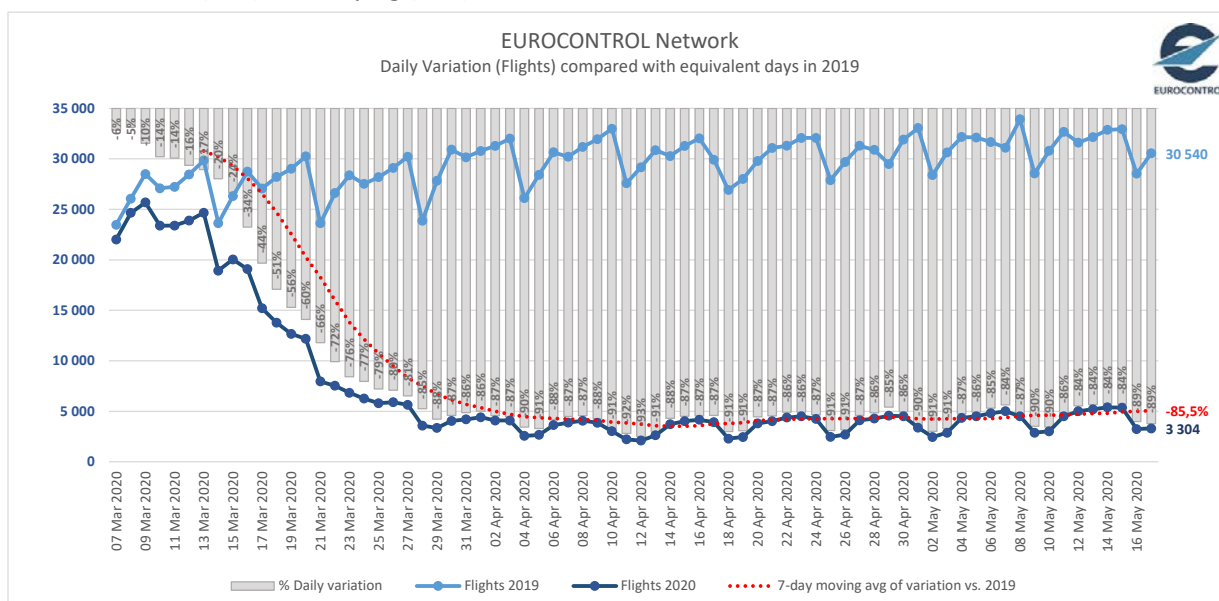
COVID19 Impact on European Air Traffic EUROCONTROL Comprehensive Assessment

**Air Traffic situation: Sun 17 May 2020
& Week 20 (11-17 May 2020)
(compared with equivalent period in 2019)**

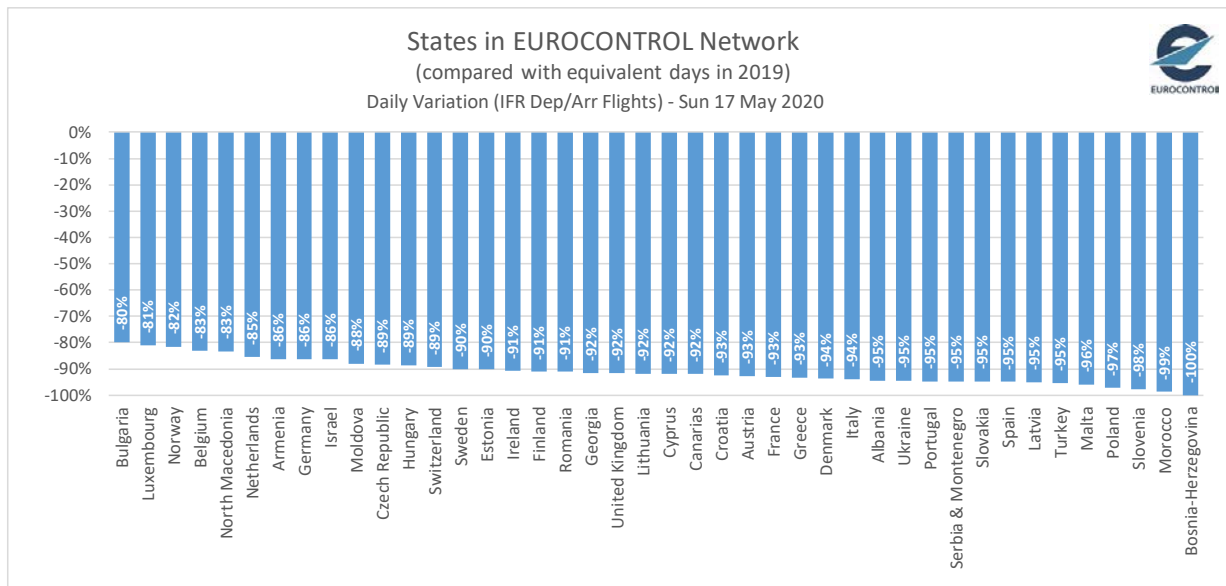
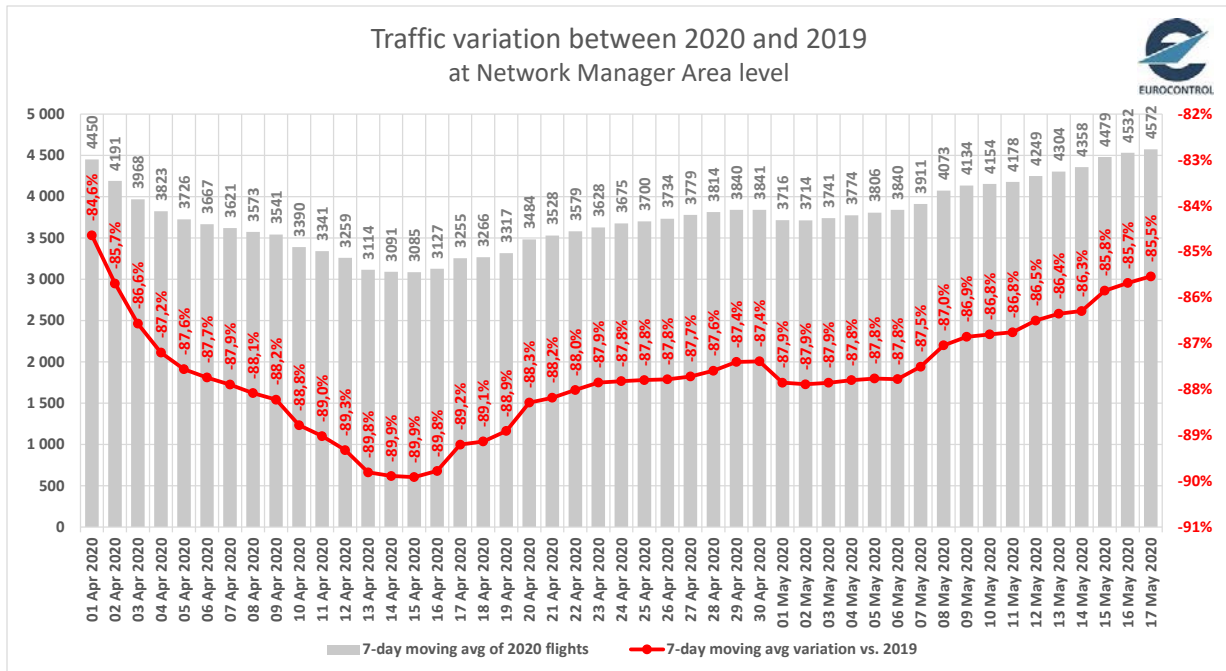
1. Summary points on the network situation:

- **NM Network flights Sun 17 May: 3,304 flights -89.2% (27,236 fewer flights)**
 - Increase of +284 movements on the previous Sunday 10 May.
 - Qatar Airways (114) was the busiest operator with 114 movements, followed by Lufthansa (96), KLM (96), Turkish Airlines (86), and SAS (86). DHL Express (67) operated 67 flights and Widerøe (81).
 - Bristow Norway AS which transports crew to oil installations in the North Sea operated 11 flights, mostly from Bergen and Stavanger.
 - Frankfurt (255) was the busiest airport with 255 movements, followed by Heathrow (235), Schiphol (211), CDG (152), and Ataturk (122). Being a Sunday, Leipzig (97) was calmer.

- **Week #20 (11-17 May): 4,572 flights (daily avg) -85.5% (189,294 fewer flights)**
 - Increase of +418 per day on the previous week.
 - Saturday was the quietest day of the week with 3,247 flights.
 - The 'deficit' since 01 March 2020 totals 1,621,727 flights.
 - DHL Express (179) was the busiest operator with an average of 179 movements per day, followed by Widerøe (150), Lufthansa (102), Qatar Airways (98) and KLM (94).
 - Averaged across the week, Frankfurt (251) was the busiest airport with an average of 251 movements per day followed by Heathrow (220), Schiphol (201), CDG (200), Oslo (153) and Leipzig (147).

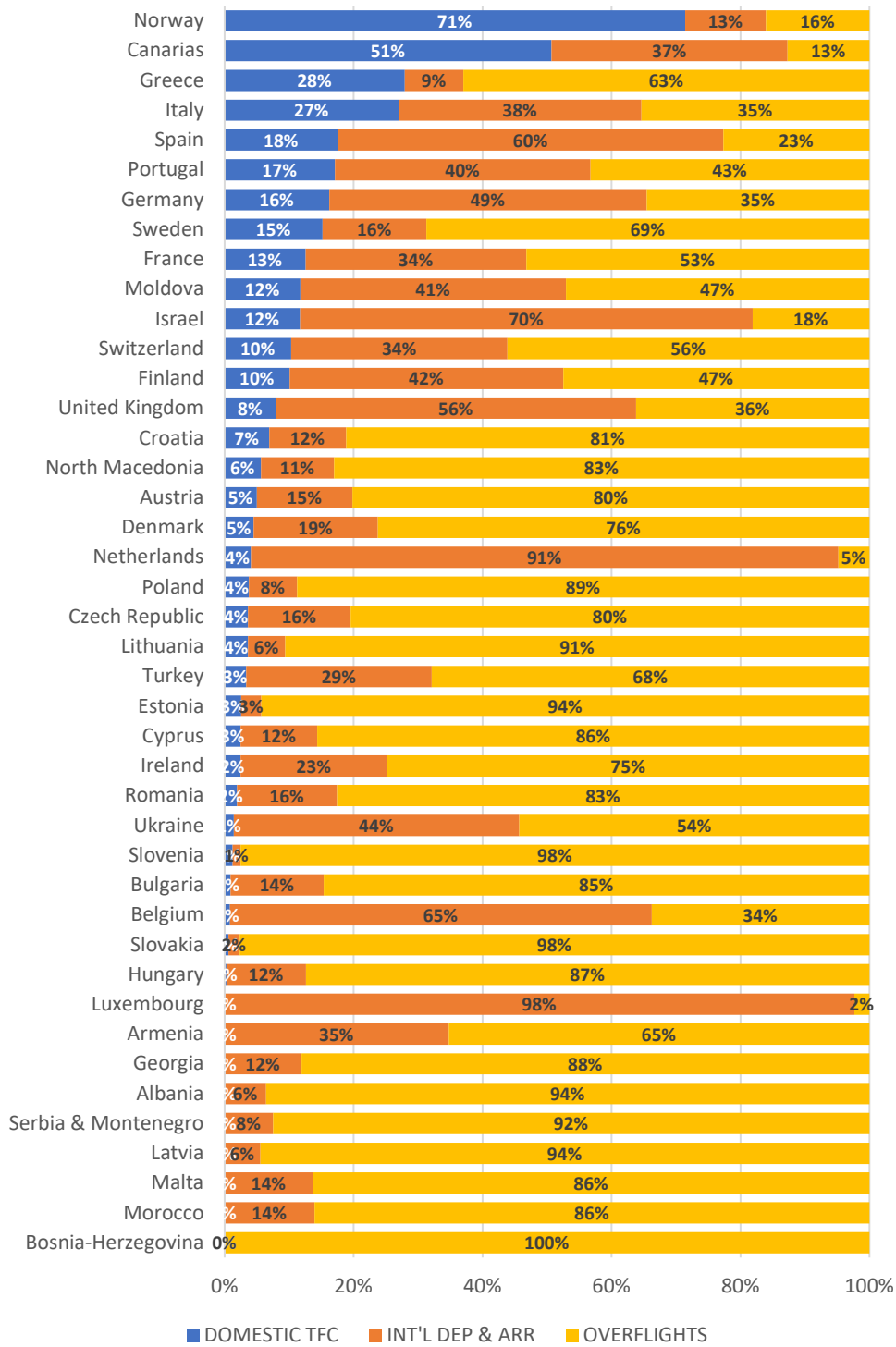


- When zooming in on April and May, a constant but slight recovery is clearly visible at network level since mid April both in terms of variation against 2019 and in absolute number of flights (using 7-day moving average for both indicators).

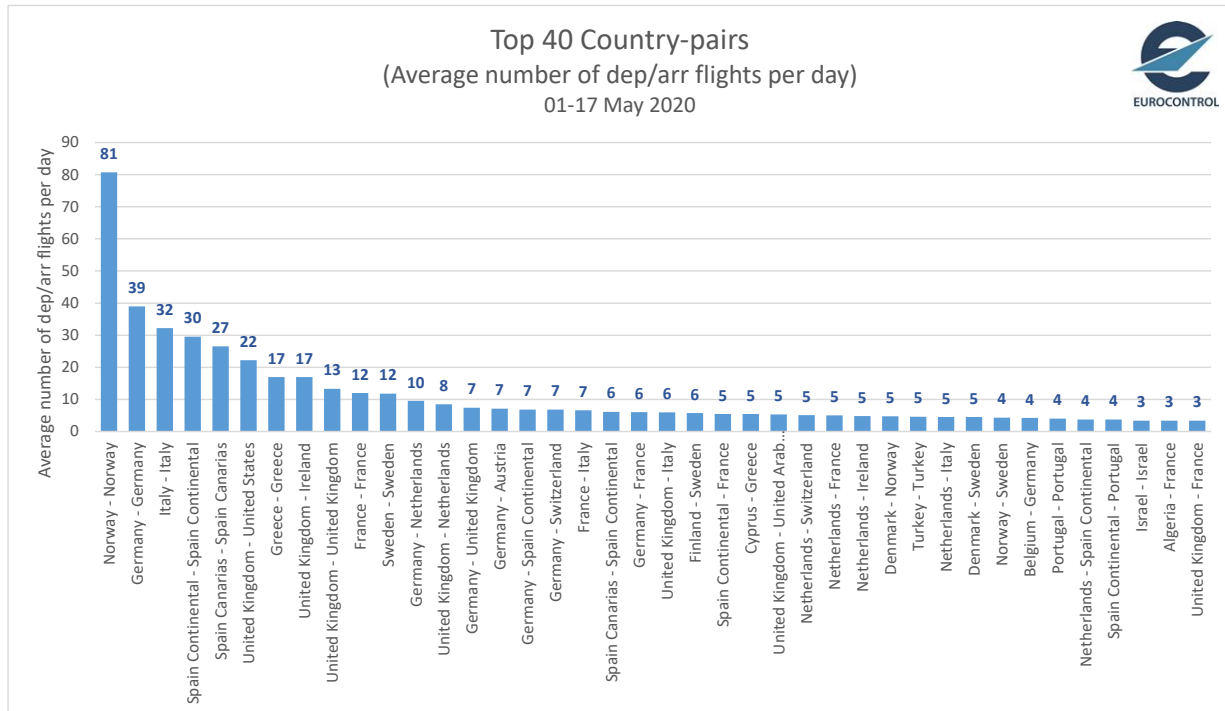


Daily structure of traffic

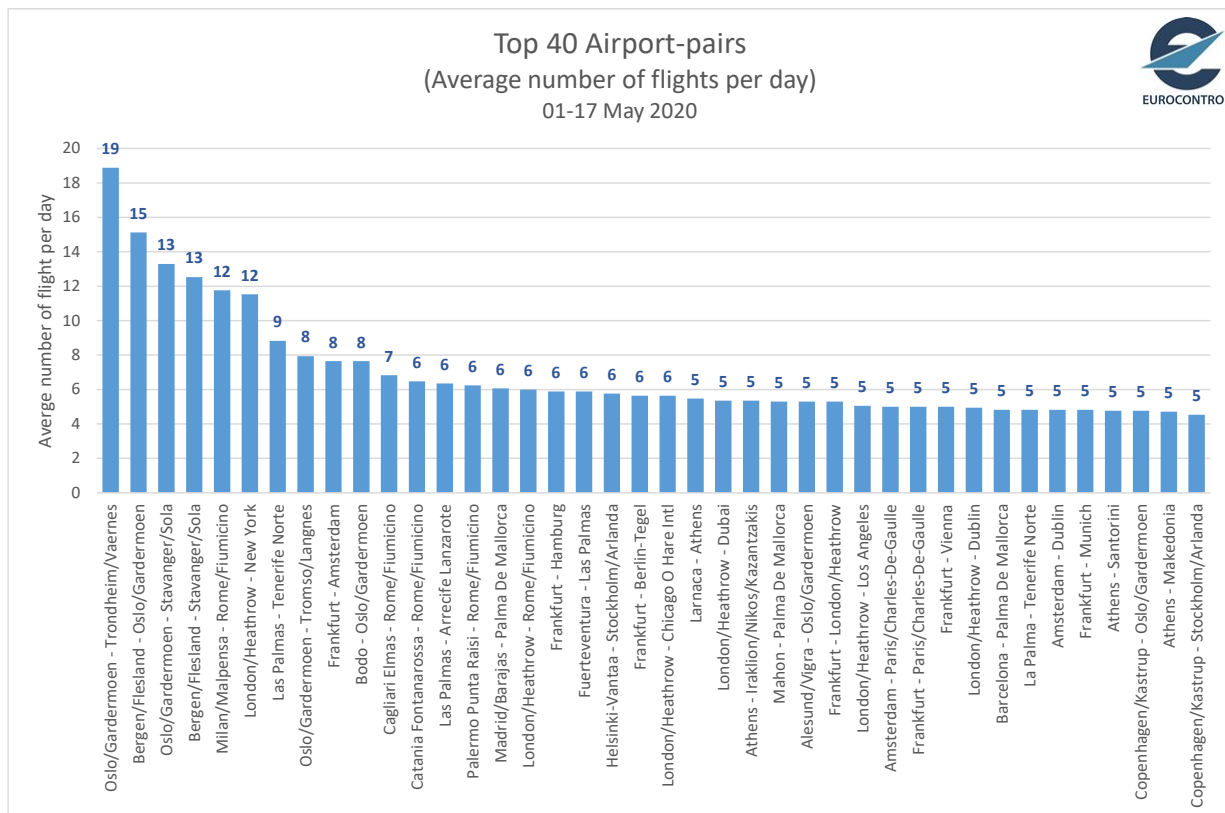
Sunday 17 May 2020



- When considering departing and arriving flights per country-pairs over the first half of May, the domestic flow within Norway is clearly the highest with 81 dep/arr flights a day on average. Moreover, the top flows are mainly domestic.

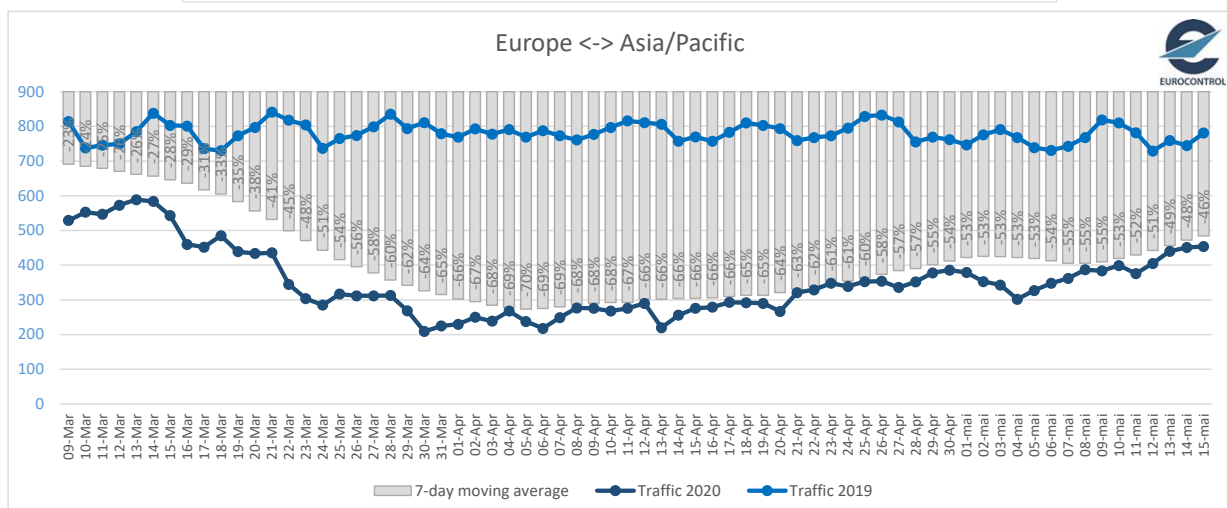
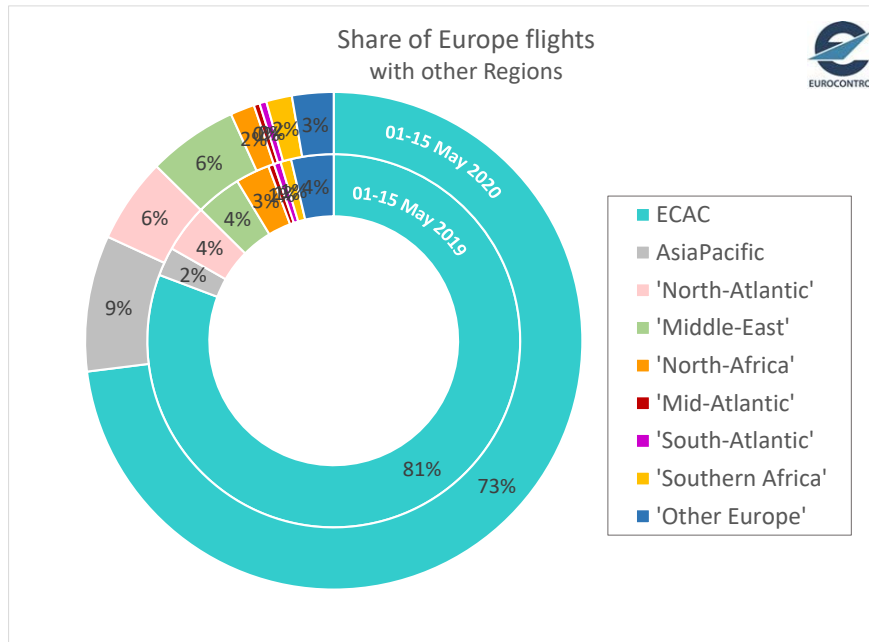
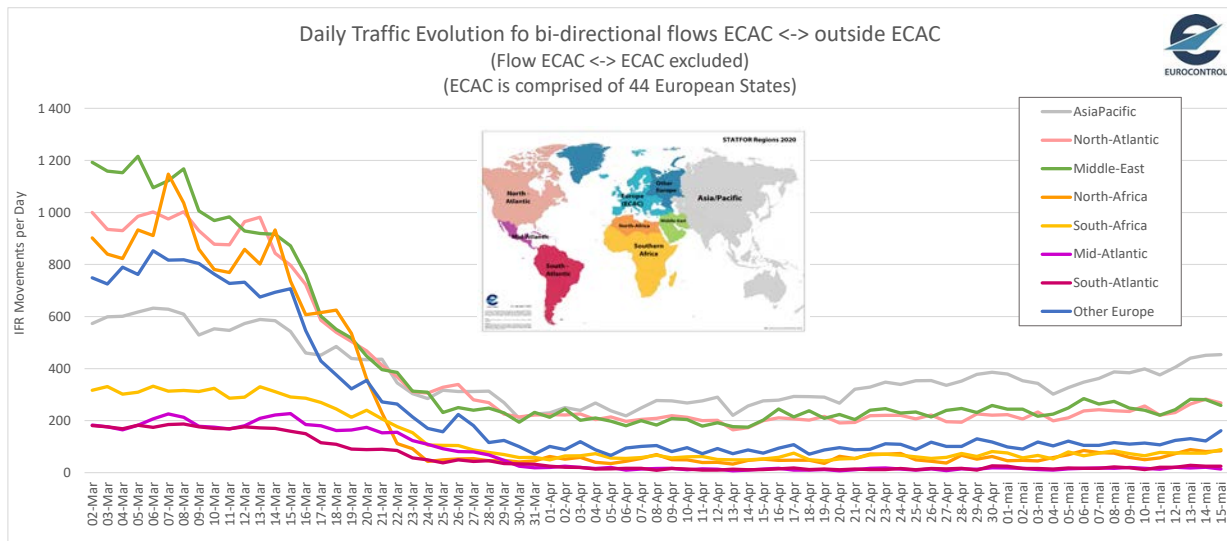


- This analysis can be extended to airport pairs. Apart from the flows between Norwegian airports which accounts for more than 12 dep/arr flights a day on average, Milan/Roma is 5th with 12. All other top 40 airport pairs are around 5-6 dep/arr flights a day on average.



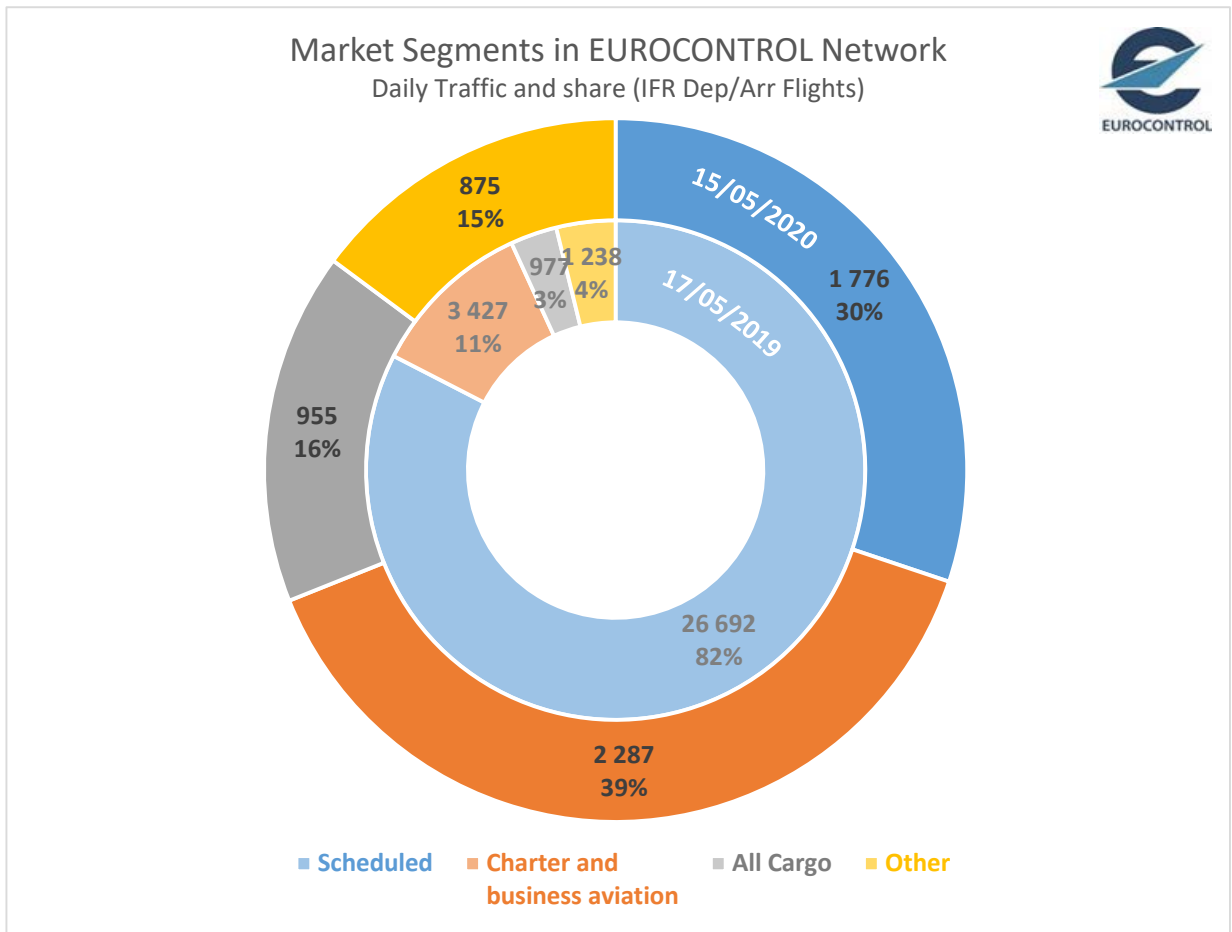
2. ECAC – Worldwide Regions Traffic:

- In March, all bi-directional traffic flows between ECAC and other regions in the world decreased with various dynamics and amplitude. The flow with Asia/Pacific is now the largest share of traffic to/from ECAC at 9% and has been constantly increasing since 1 April to be at -46% compared to 2019 on 15 May after having reached a minimum of -70% on 5 April.

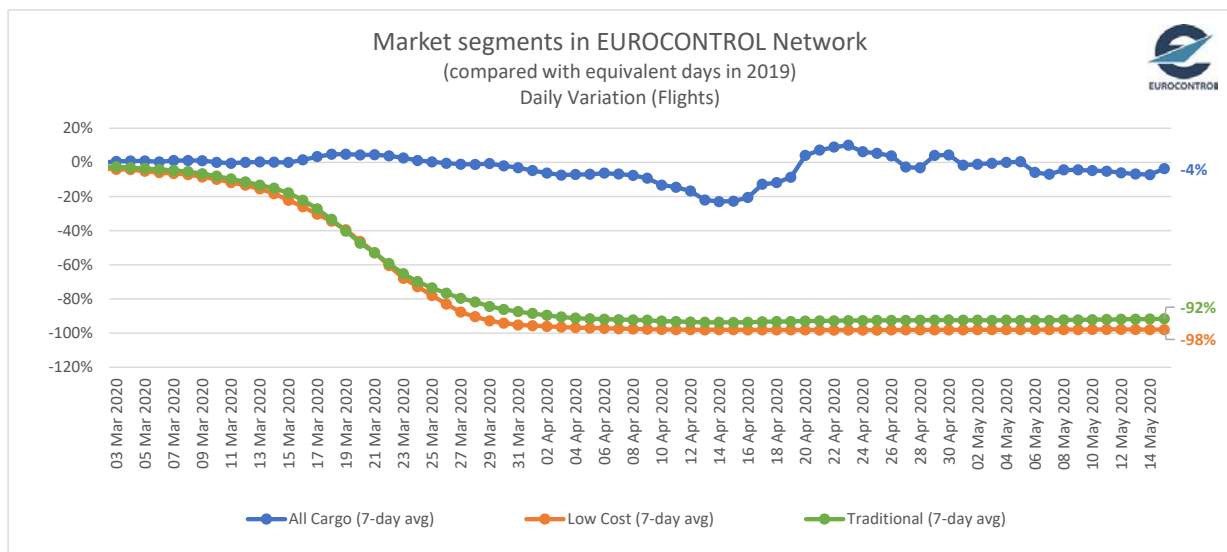


3. Market Segments (Up to 15 May 2020)

- This time last year, all-cargo flights accounted for about 3% of total Departure / Arrival flights, whereas now, it accounted for 16% on 15 May 2020. The share of scheduled traffic, which accounted for 82% reduced to 30% only.

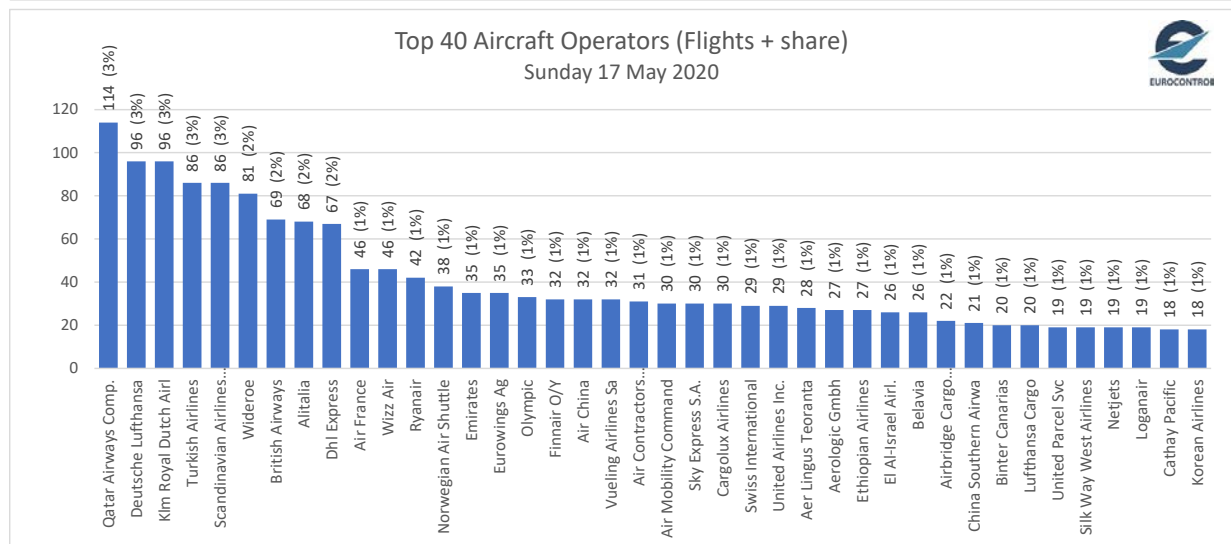
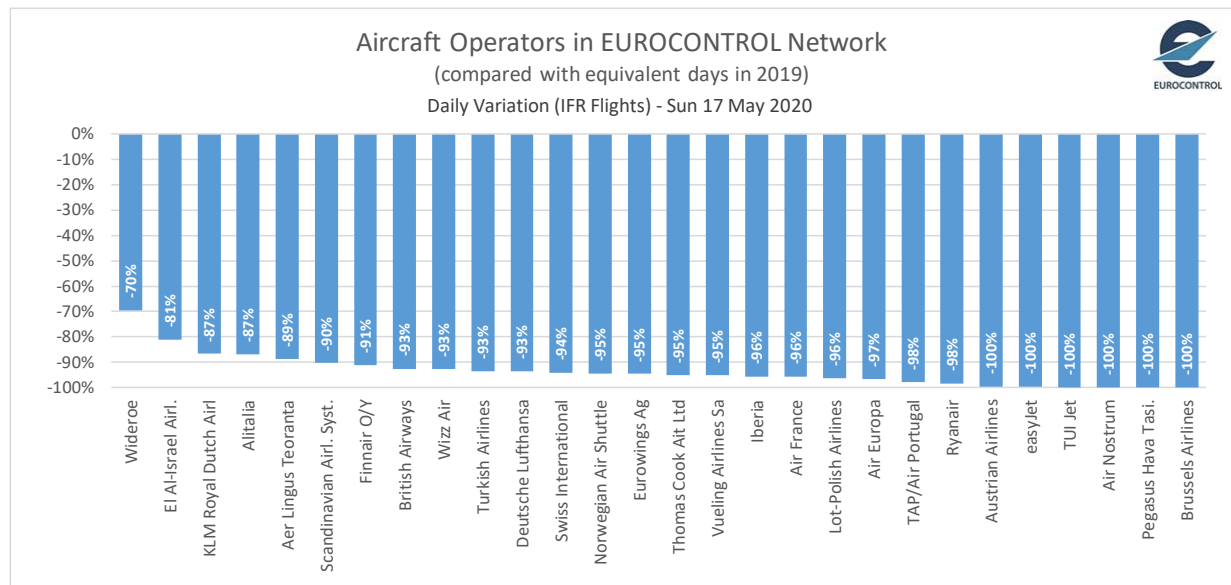
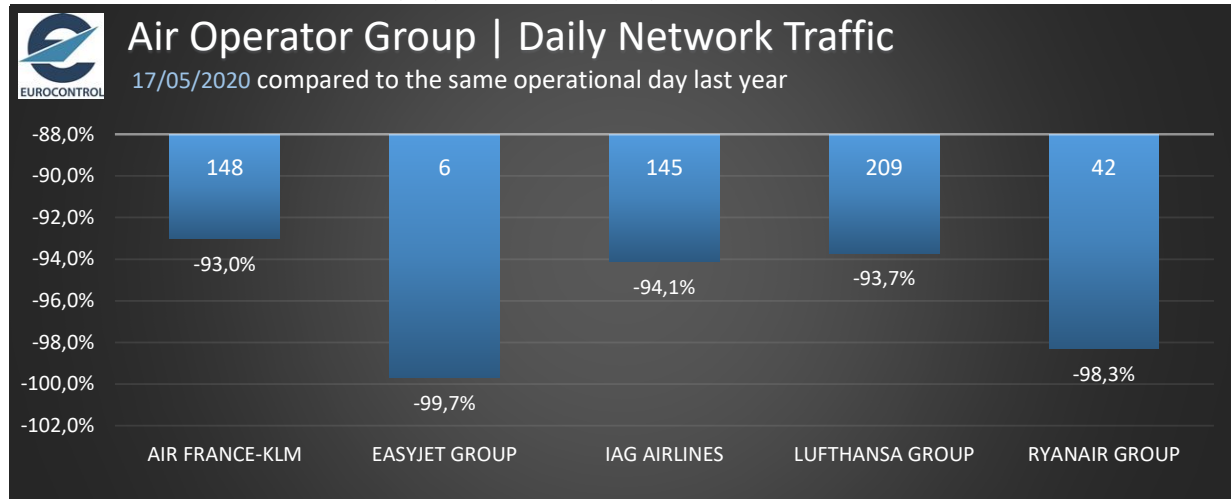


- During the crisis, it appears clearly that all-cargo flights remained stable at the 2019 level with a variation around the Easter period (both 2019 and 2020) while scheduled and low-cost traffic reduced by 92% (respectively 98%) during the crisis.



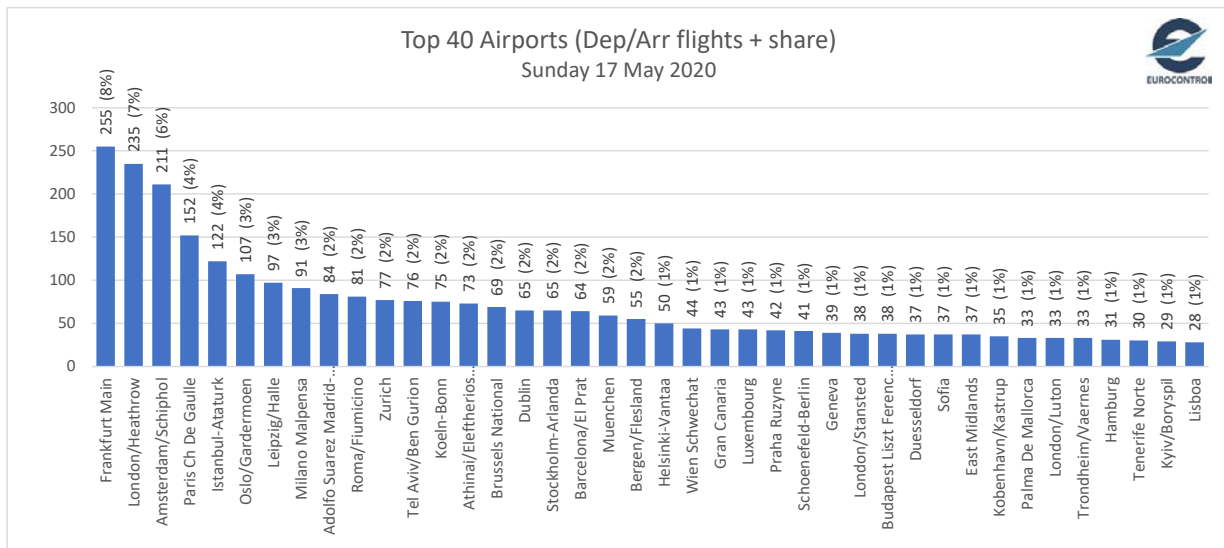
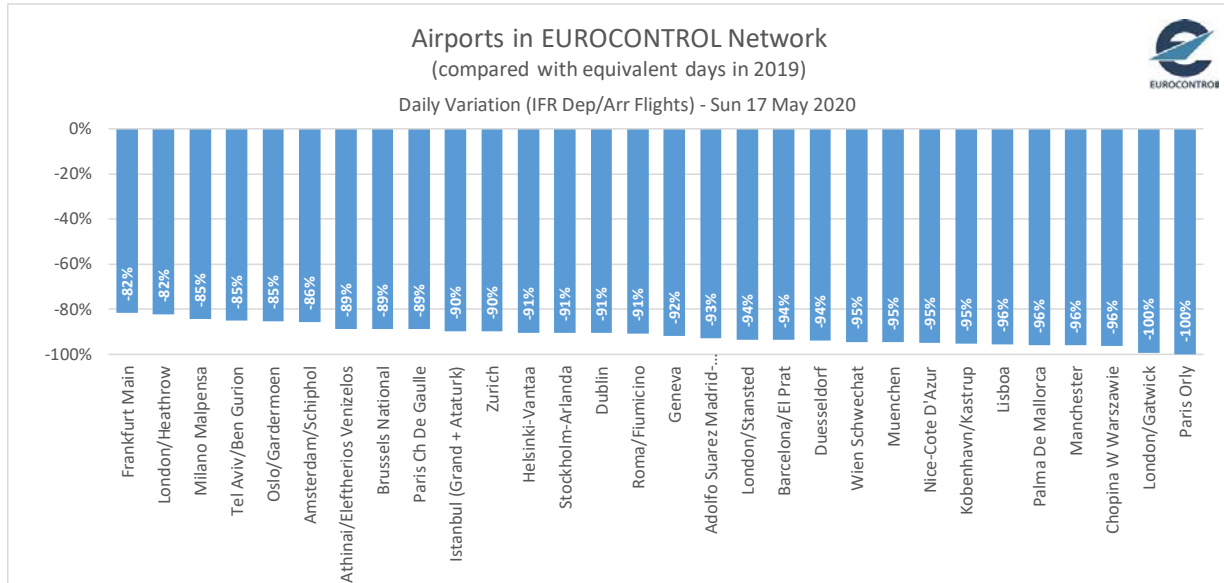
4. Airlines

- For the largest Air Operator Groups, the reductions on **Sunday 17 May** were: easyJet -99.7%, Ryanair Group -98.3%, IAG Airlines -94.1, Lufthansa Group -93.7% and Air-France-KLM -93.0%.
- On Sunday 17 May, Brussels Airlines, Pegasus, Air Nostrum had not operations at all while TUI Jet, easyJet and Austrian airlines were at -100%. Ryanair and TAP were -98%, Air France -96%, Iberia -95%, Lufthansa, Turkish airlines and British Airways -93% and KLM -87%.
- Qatar airways was the busiest Airline with 114 movements, followed by Lufthansa and KLM (96), Turkish Airlines and SAS (86) and Widerøe (81).



5. Airports:

- On **Sunday 17 May**, virtually all of Europe's largest airports are managing 80% fewer flights compared to last year, examples: Paris Orly and London Gatwick were -100%, Munich -95%, Vienna -95%, Madrid -93%, Roma -91%, Dublin -91%, Istanbul -90%, Paris CDG and Athens -89%, Amsterdam -86%, Oslo -85%, Milan Malpensa -85%, London Heathrow -82% and Frankfurt -82%.
- On Sunday 17 May, Frankfurt was the busiest airport with 255 movements, followed by London/Heathrow (235), Amsterdam (211), Paris CDG (152), Istanbul (122), Oslo Gardermoen (107), Leipzig (97), Milan (91) and Madrid (84).



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.

