

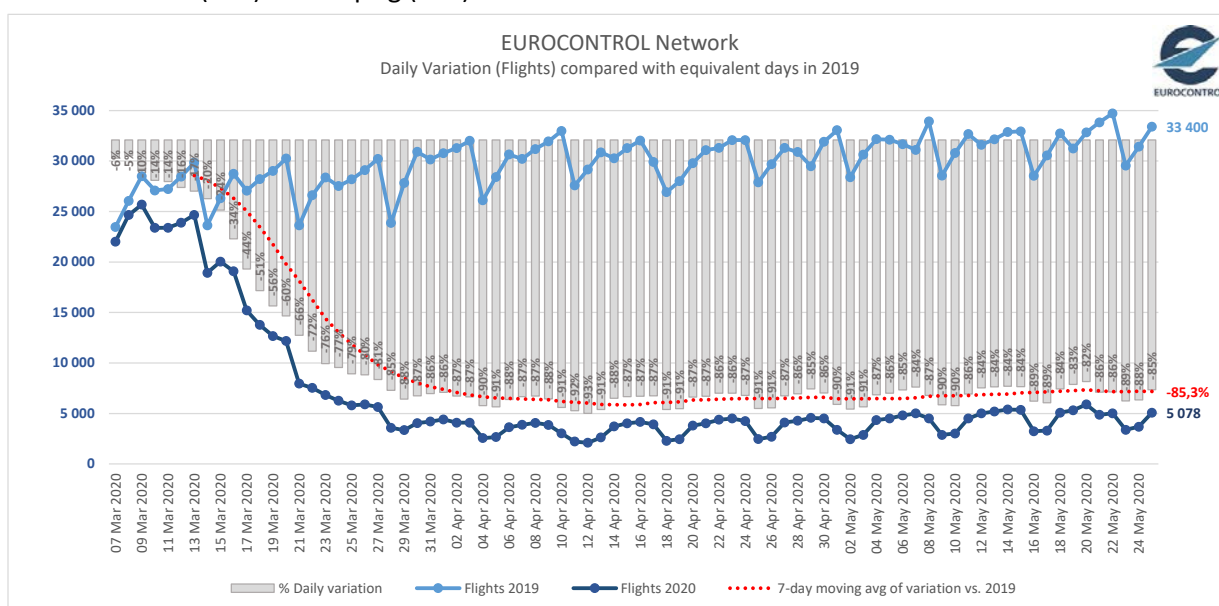


# COVID19 Impact on European Air Traffic EUROCONTROL Comprehensive Assessment

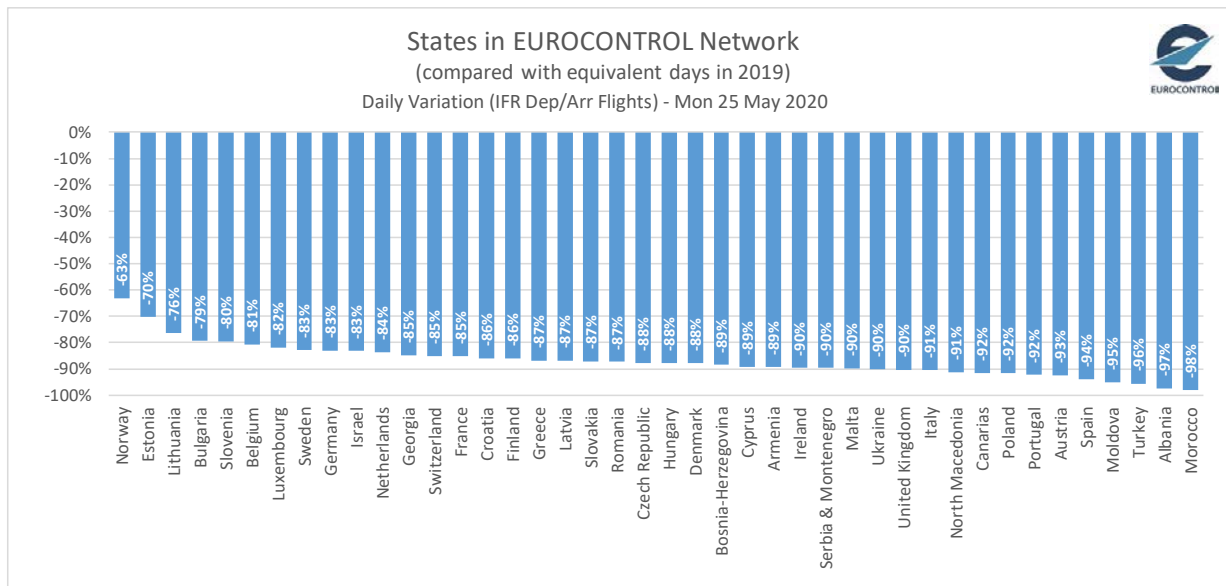
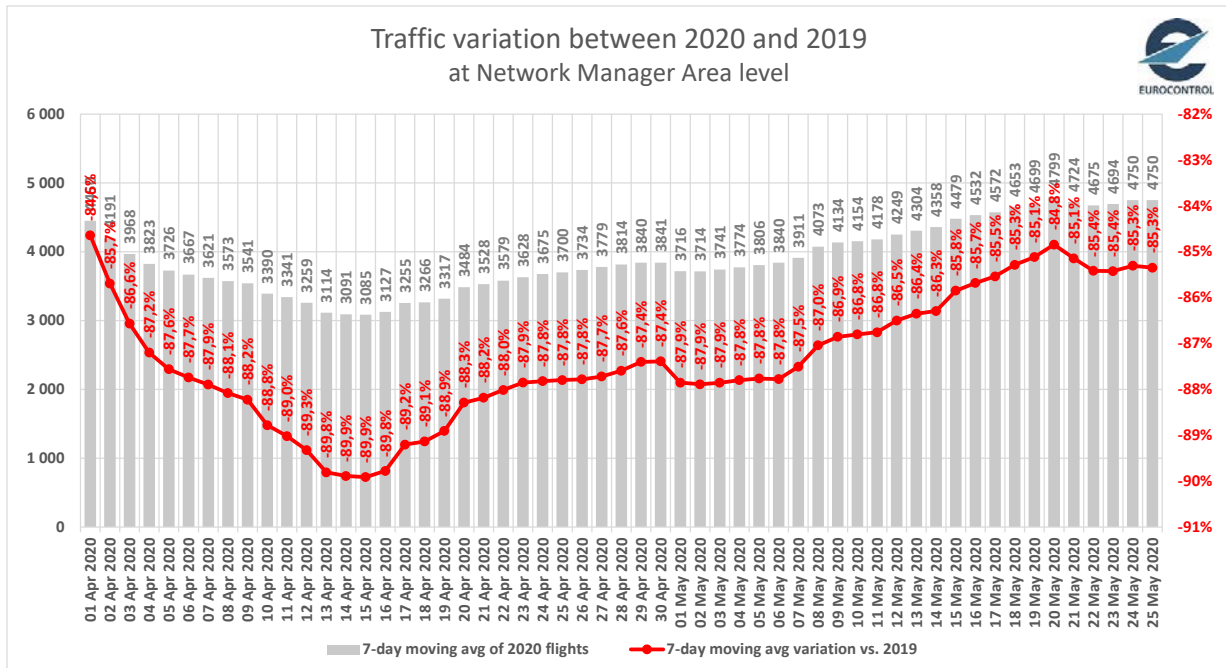
**Air Traffic situation: Mon 25 May 2020  
& Week 21 (18-24 May 2020)  
(compared with equivalent period in 2019)**

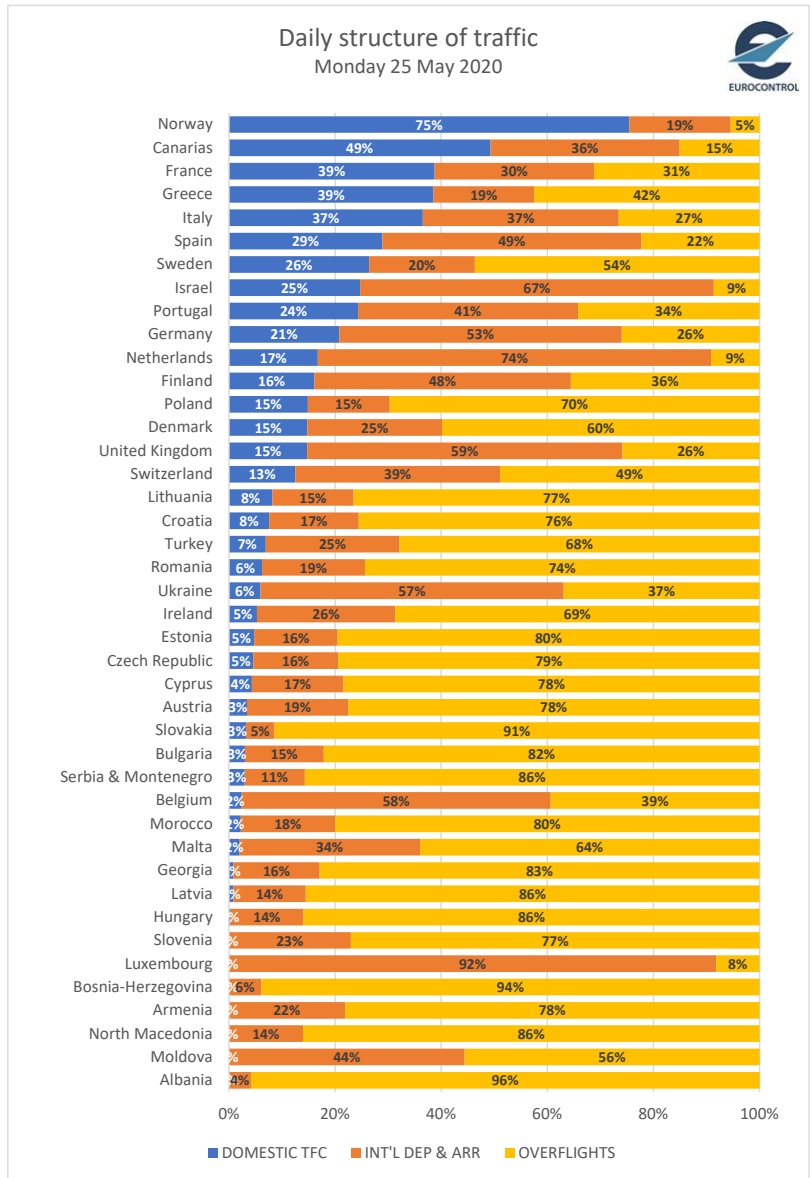
## 1. Summary points on the network situation:

- **NM Network flights Mon 25 May: 5,078 flights** **-84.8% (28,322 fewer flights)**
  - Increase of +3 movements on the previous Monday 18 May.
  - Widerøe was the busiest airline with 182 movements, followed by DHL Express (177), Bristow Norway (137), Lufthansa (114), SAS (101), KLM (99), Qatar Airways (88) and Turkish Airlines (87).
  - Frankfurt was the busiest airport with 249 movements, followed by London/Heathrow (223), Amsterdam (199), Paris CDG (188), Oslo (160), Bergen (156), Köln/Bonn (155), Athens (125) and Leipzig (125).
  
- **Week #21 (18-24 May): 4,750 flights (daily avg)** **-85.3% (193,024 fewer flights)**
  - Increase of +178 per day on the previous week.
  - Thursday marked the Ascension Public Holiday in many states across the NM Area.
  - Saturday was the quietest day of the week with 3,380 flights.
  - The 'deficit' since 01 March 2020 totals 1,814,755 flights.
  - DHL Express (175) was the busiest operator with an average of 175 movements per day, followed by Widerøe (133), Lufthansa (114), Turkish Airlines (102) and KLM (104).
  - Averaged across the week, Frankfurt (255) was the busiest airport with an average of 255 movements per day followed by Heathrow (236), Schiphol (214), CDG (205), Oslo (149) and Leipzig (145).

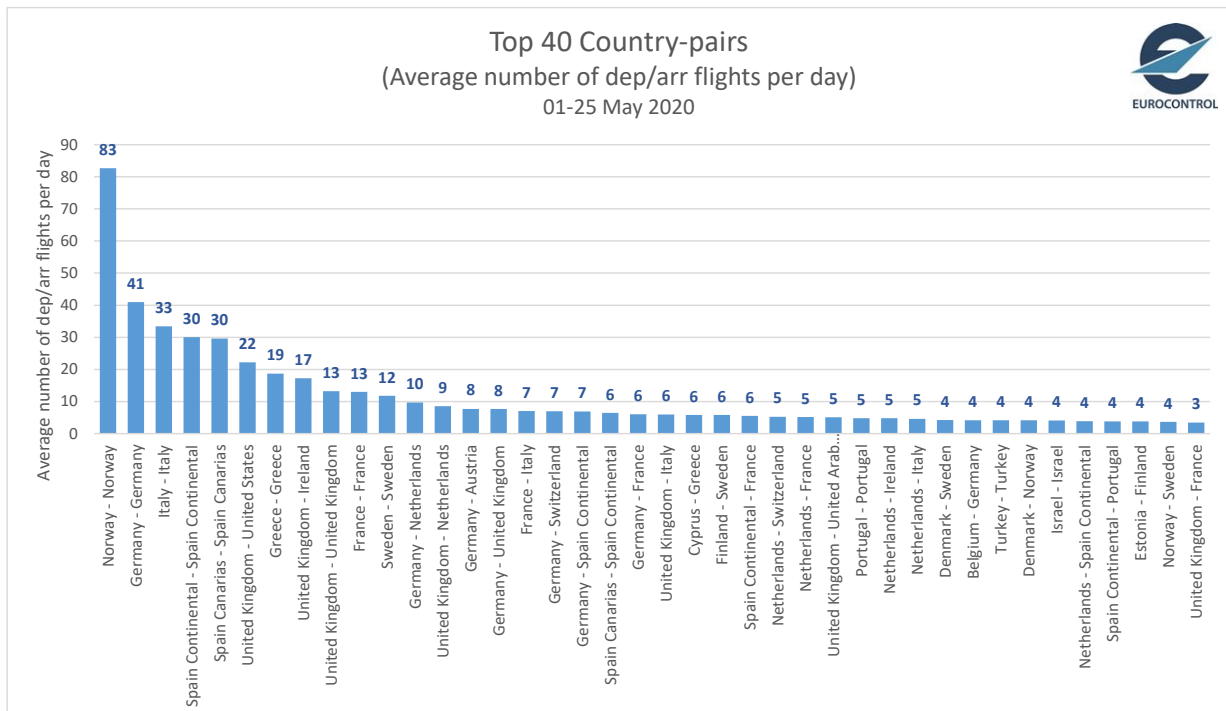


- When zooming in on April and May, a constant but slight recovery is clearly visible at network level since mid-April both in terms of variation against 2019 and in absolute number of flights (using 7-day moving average for both indicators).

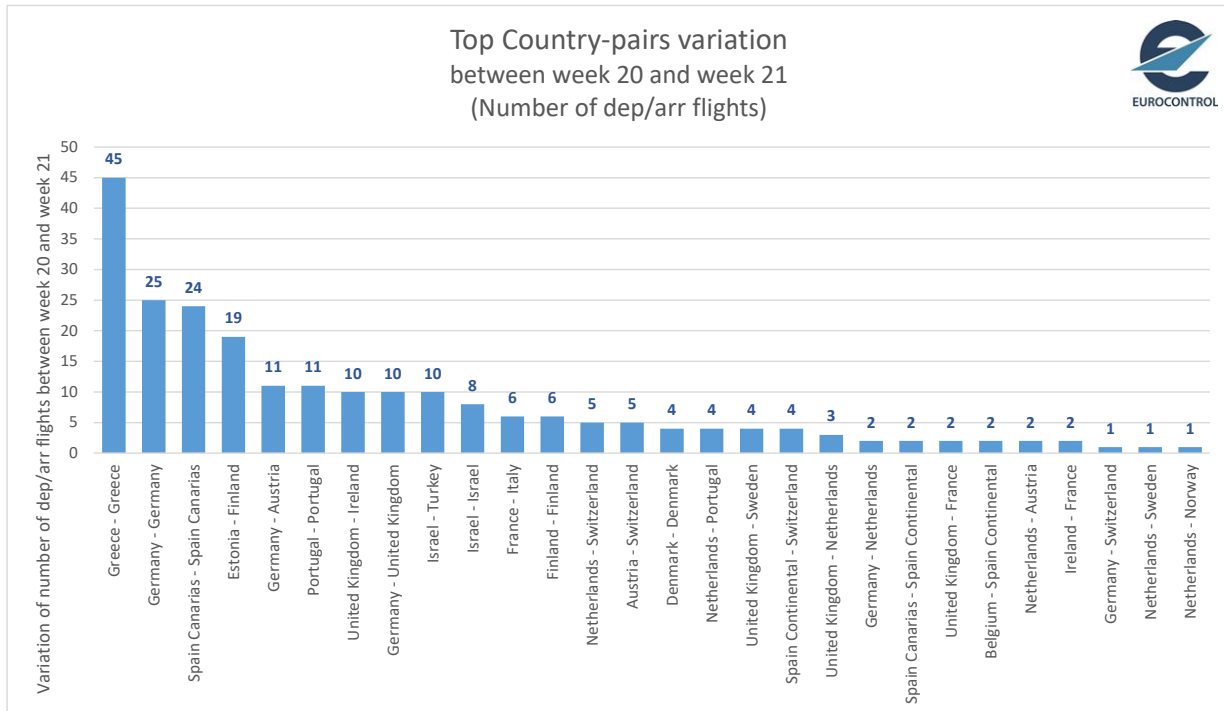




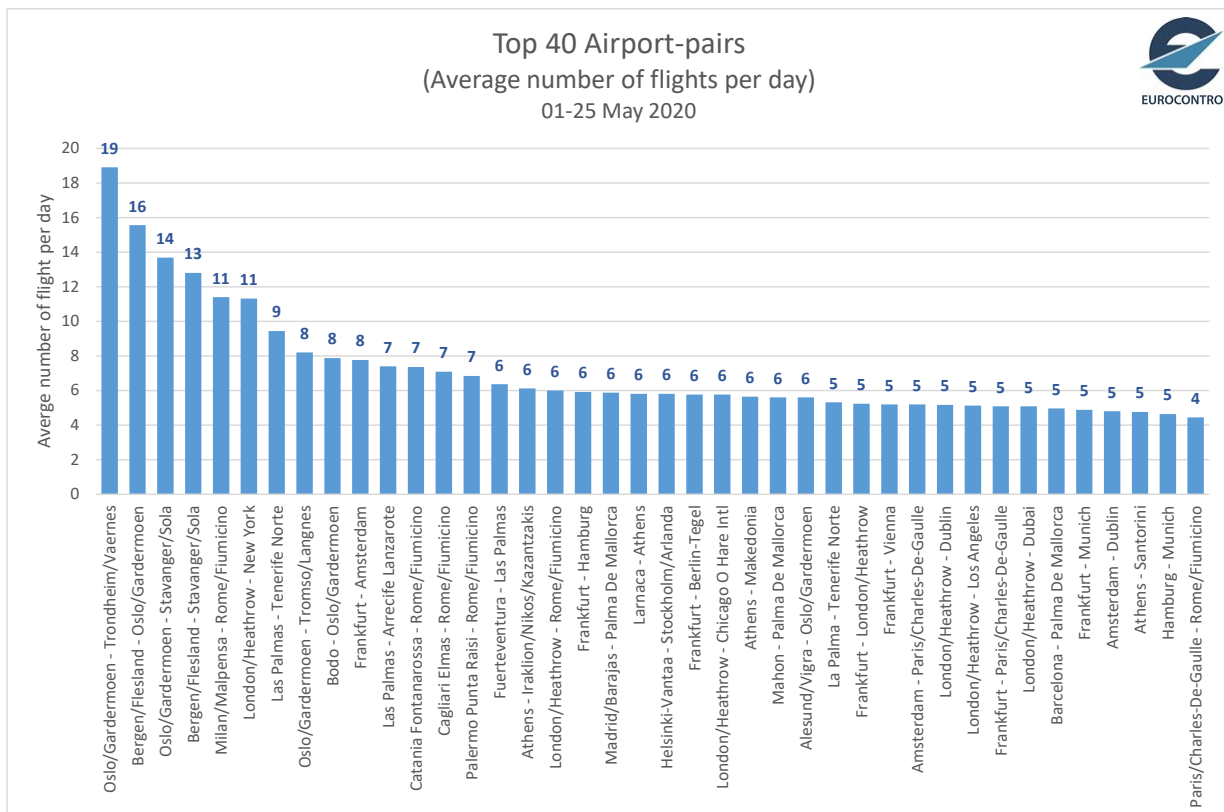
- When considering departing and arriving flights per country-pairs over the first 25 days of May, the domestic flow within Norway is clearly the highest with 83 dep/arr flights a day on average. Moreover, the top flows are mainly domestic.



- When comparing week 20 (11-17 May) and week 21 (18-24 May), the flows which increase the most are the domestic flights within Greece (+45 dep/arr flights), then within Germany (+25) and Spain (+24).

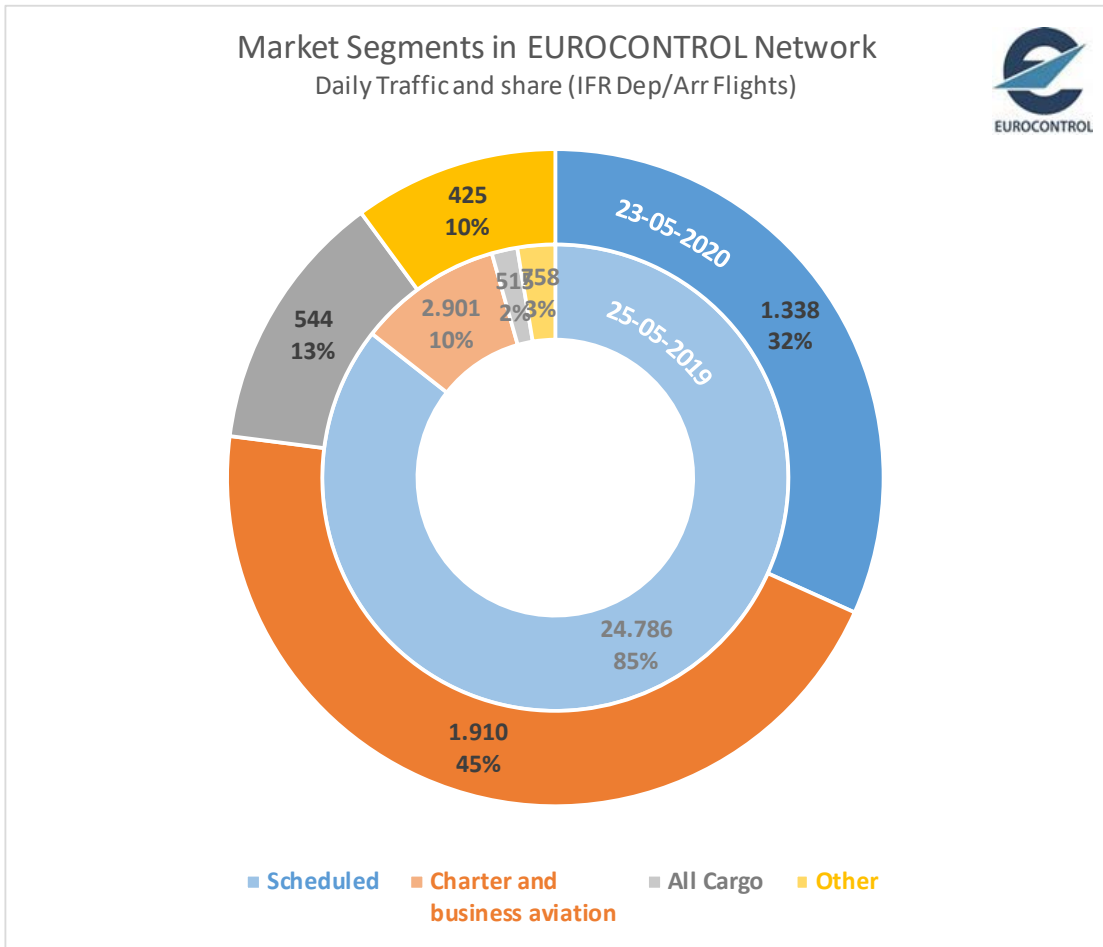


- This analysis can be extended to airport pairs over the same 25 days of May 2020. Apart from the flows between Norwegian airports which accounts for more than 11 dep/arr flights a day on average (reaching 19 between Oslo and Trondheim), Milan/Roma is 5<sup>th</sup> with 11. All other top 40 airport pairs are around 5-8 dep/arr flights a day on average.

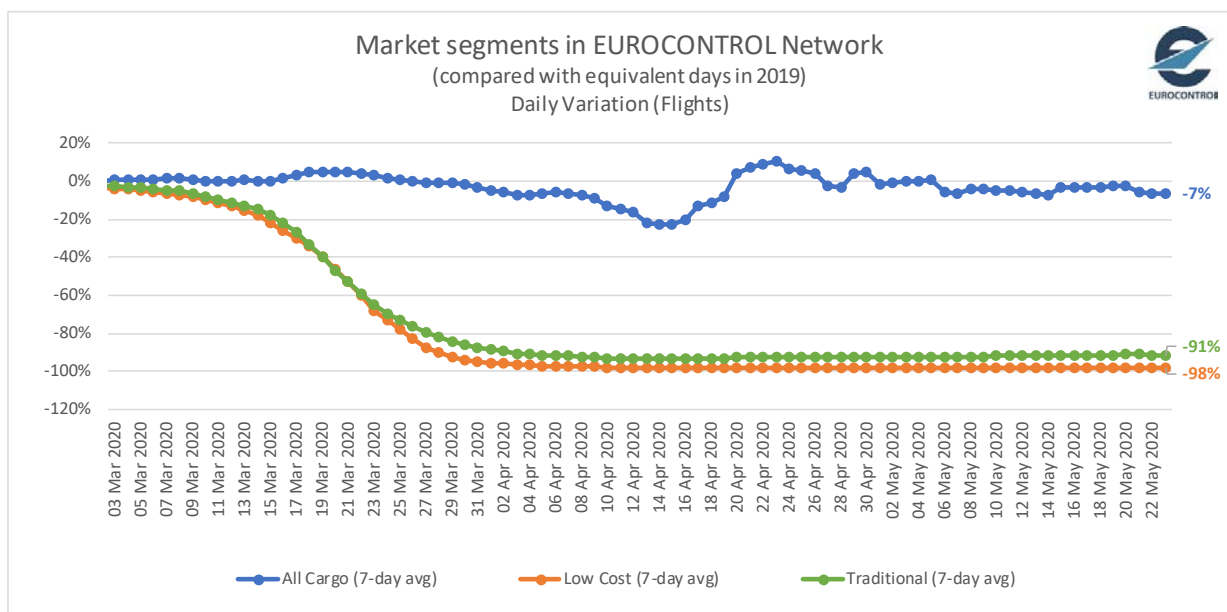


## 2. Market Segments (Up to 23 May 2020)

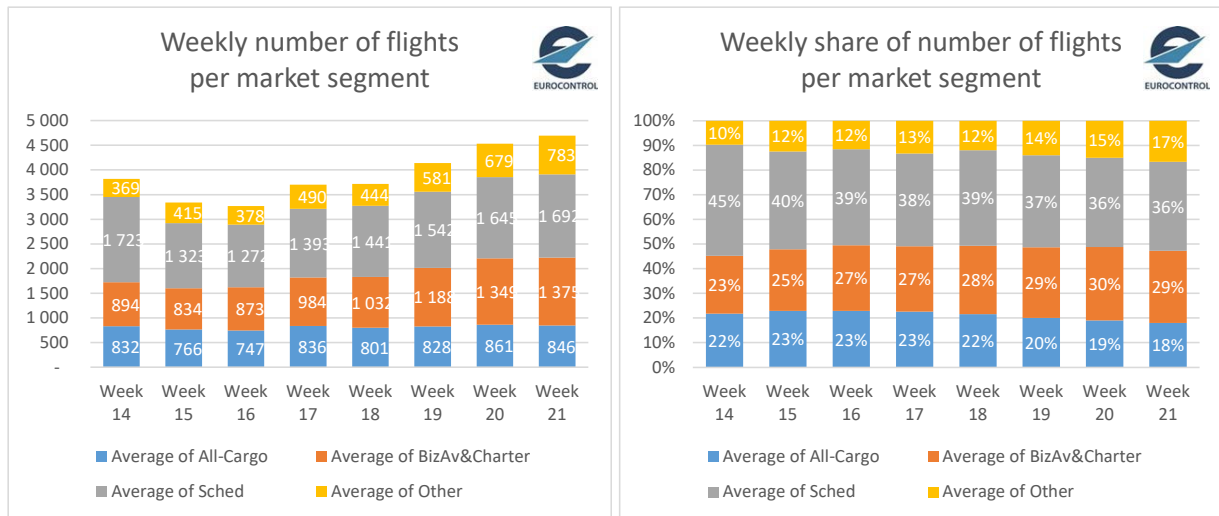
- This time last year, all-cargo flights accounted for about 2% of total Departure / Arrival flights, whereas now, it accounted for 13% on 23 May 2020. The share of scheduled traffic, which accounted for 85% reduced to 32% only.



- 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.

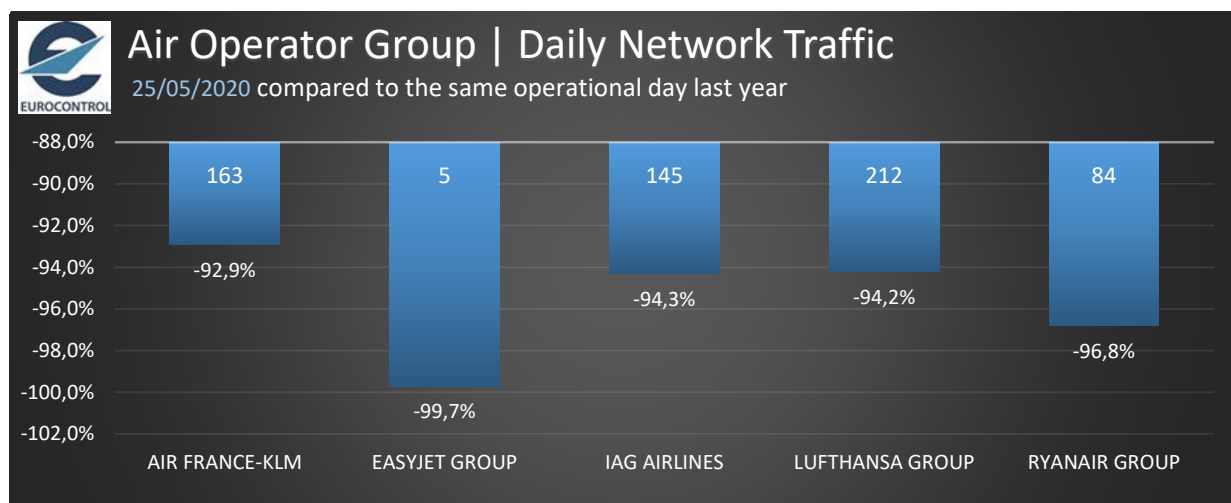


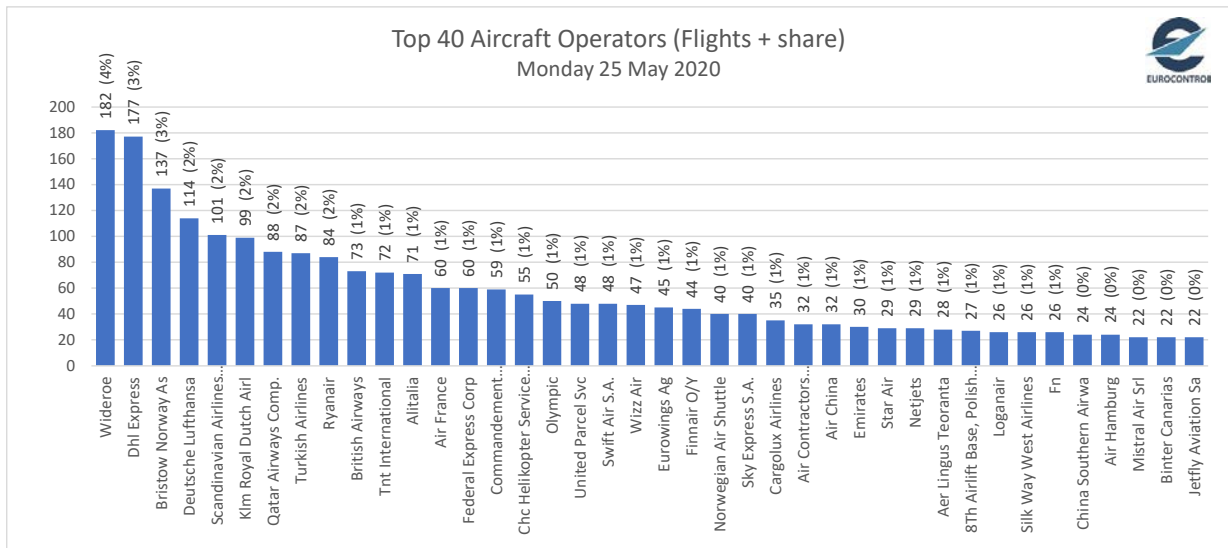
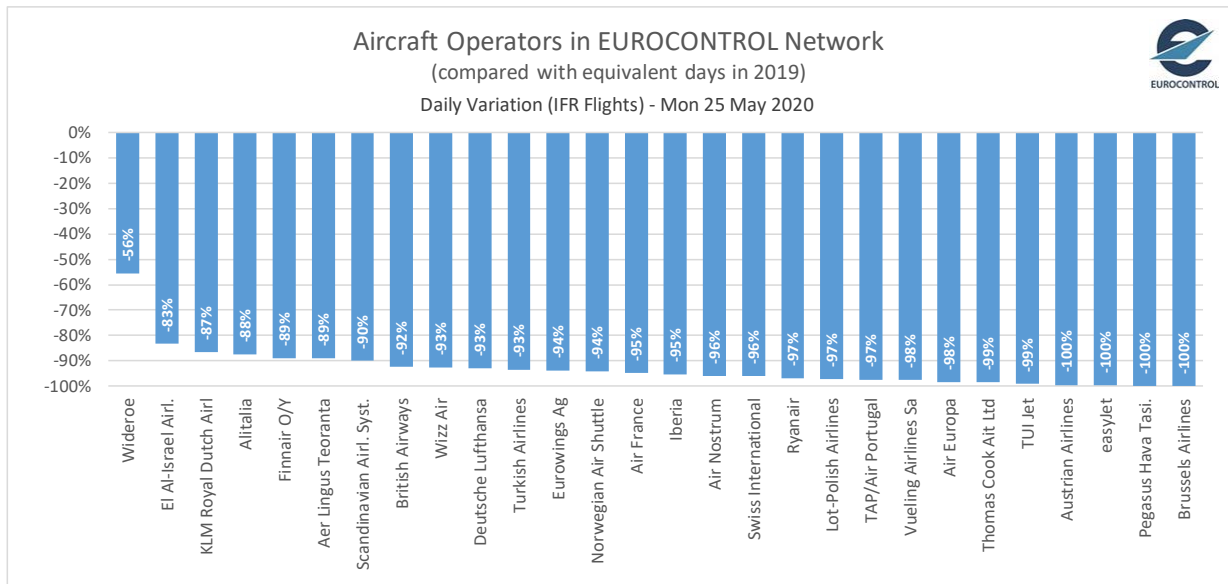
- As shown below, the traffic per market segment is slightly increasing since week 16 and all cargo flights, despite increasing in absolute terms, see their share slightly reducing as they increased less than other market segment flights.



### 3. Airlines

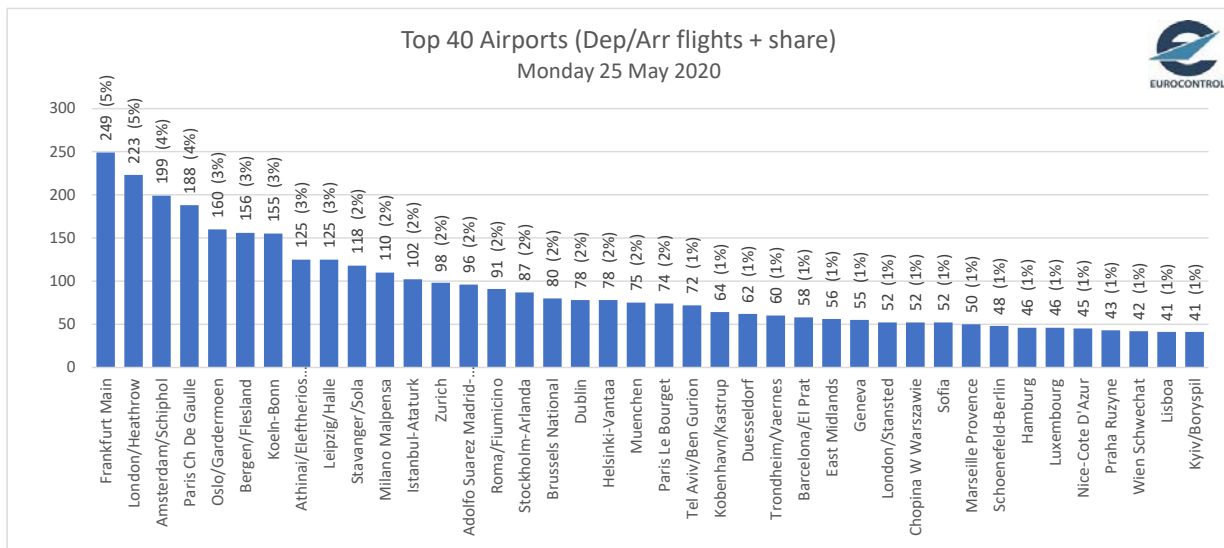
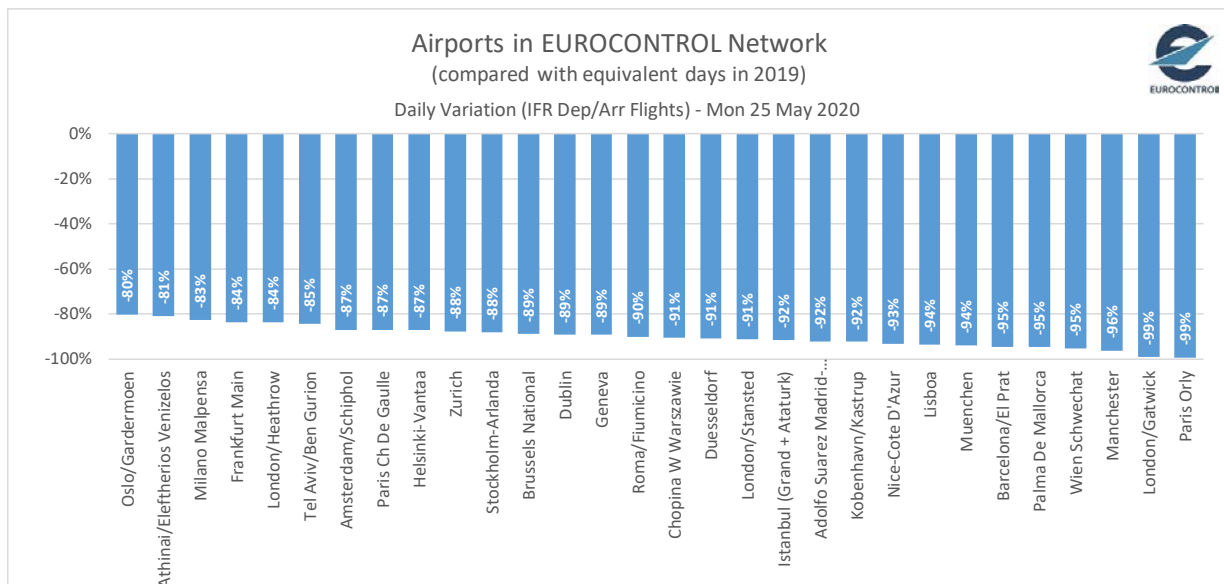
- For the largest Air Operator Groups, the reductions on **Monday 25 May** were: easyJet -99.7%, Ryanair Group -96.8%, IAG Airlines -94.3%, Lufthansa Group -94.2% and Air-France-KLM -92.9%.
- On Monday 25 May, Brussels Airlines and Pegasus had not operations at all while easyJet and Austrian airlines had almost no flights. TUI Jet was at -99%. Vueling was -98%, TAP -97%, Ryanair -97%, Iberia -95%, Air France -95%, Turkish airlines -93%, Lufthansa -93%, British Airways -92%, Alitalia -88%, KLM -87% and Widerøe -56%.
- Widerøe was the busiest airline with 182 movements, followed by DHL Express (177), Bristow Norway (137), Lufthansa (114), SAS (101), KLM (99), Qatar Airways (88) and Turkish Airlines (87).





#### 4. Airports:

- On **Monday 25 May**, virtually all of Europe's largest airports are managing 80% fewer flights compared to last year, examples: Paris Orly and London Gatwick were -99%, Vienna -95%, Munich -94%, Madrid -92%, Istanbul -90%, Roma -90%, Dublin -89%, Amsterdam -87%, Paris CDG -87%, London Heathrow -84%, Frankfurt -84%, Athens -81% and Oslo -80%.
- On Monday 25 May, Frankfurt was the busiest airport with 249 movements, followed by London/Heathrow (223), Amsterdam (199), Paris CDG (188), Oslo (160), Bergen (156), Koln/Bonn (155), Athens (125) and Leipzig (125).



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](http://www.eurocontrol.int/Economics/DailyTrafficVariation) (or via the COVID-19 button on the top of our homepage [www.eurocontrol.int](http://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.

