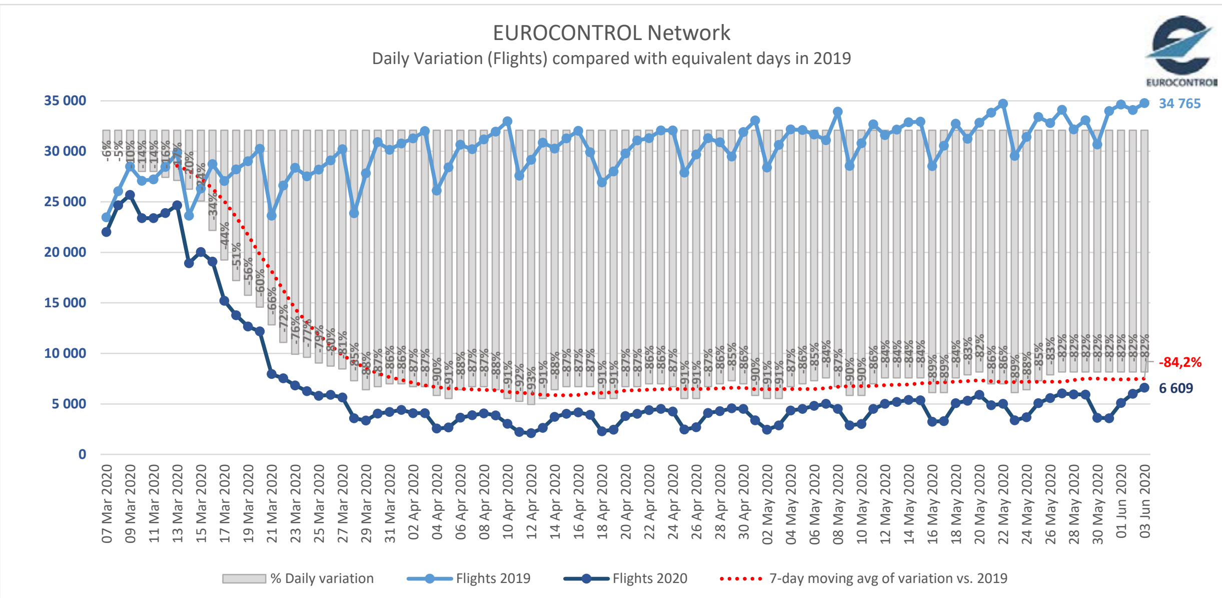
COVID19 Impact on European Air Traffic
EUROCONTROL Comprehensive Assessment

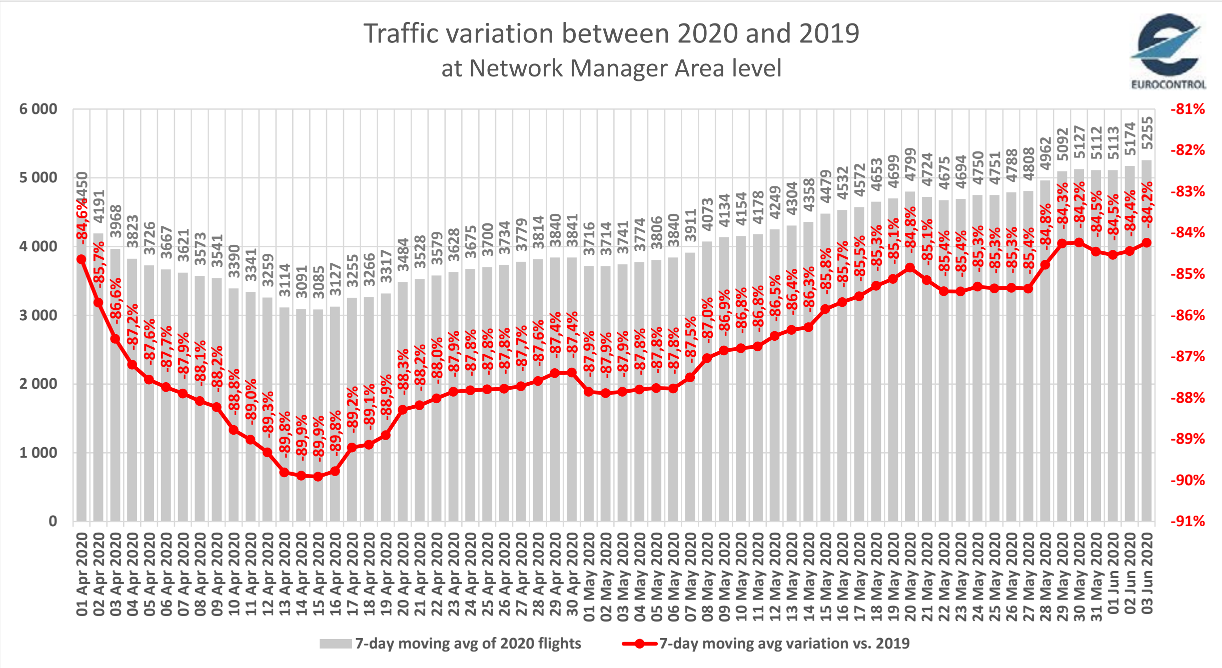
Air Traffic situation: Wednesday 3 June 2020 & Week 22 (25-31 May 2020) (compared with equivalent period in 2019)

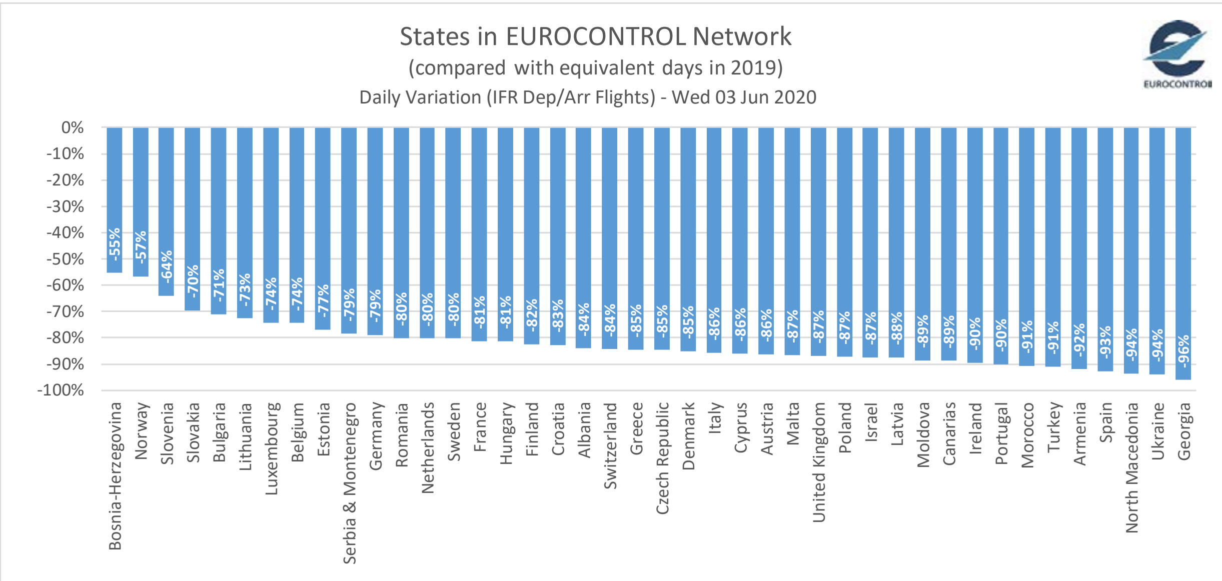
1. **<u>Summary points on the network situation:</u>**

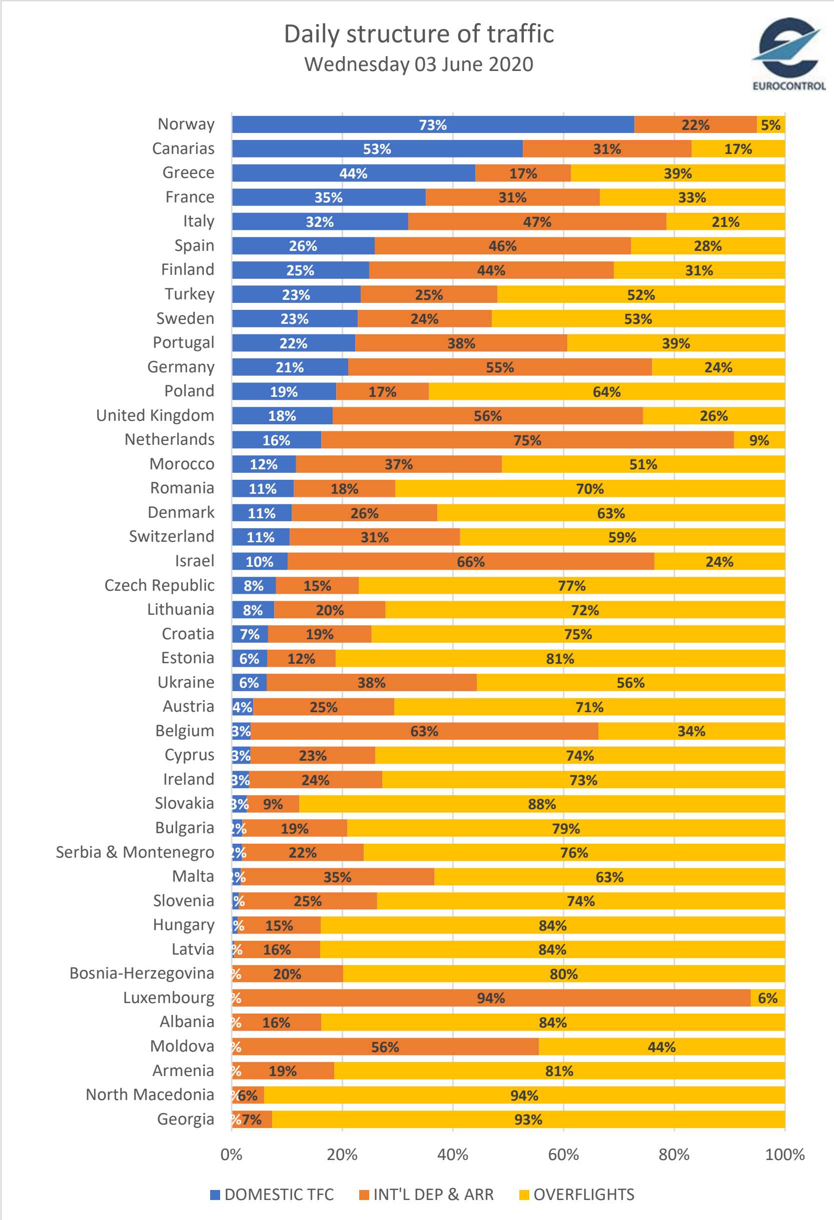
- **NM Network flights Wed 3 June:** **6,609 flights** **-81.0%** (**28,156** fewer flights)
  - Increase of +569 movements on the previous Wednesday 27 May.
  - DHL Express (254) was the busiest operator with 254 movements, followed by Widerøe (241), Turkish Airlines (193), Lufthansa (165) and KLM (135).
  - Frankfurt was the busiest airport with 280 movements, followed by CDG (265), Heathrow (253), Schiphol (240) and Oslo (213).
  - Wizz Air (WZZ + WUK) resumed operations on Monday and Tuesday from their bases in Belgrade and Tuzla and restored some routes from their base in Budapest.
  - The gradual increase in Lufthansa's movements (week-on-week from 228 to 271) is a restoring of routes or increase in frequency between Frankfurt or Munich and Dublin, Milan, Roma, Heathrow, Lisbon Barcelona, Madrid, Praha, amongst others
- **Week #22 (25-31 May):** **5,112 flights (daily avg)** **-84.4%** (**194,424** fewer flights)
  - Increase of +367 per day on the previous week.
  - Sunday was the quietest day of the week with 3,585 flights.
  - The 'deficit' since 01 March 2020 totals 2,009,180 flights.
  - DHL Express (188) was the busiest operator with an average of 188 movements per day, followed by Widerøe (160), Lufthansa (118), Turkish Airlines (109) and KLM (108).
  - Averaged across the week, Frankfurt (258) was the busiest airport with an average of 258 movements per day followed by Heathrow (229), Schiphol (220), CDG (216), Oslo (153) and Leipzig (153).
- **May 2020:** **4,478 flights (daily avg)** **-85.9%** (**848,040** fewer flights)
  - Increase of +896 per day on the previous month (April 2020).



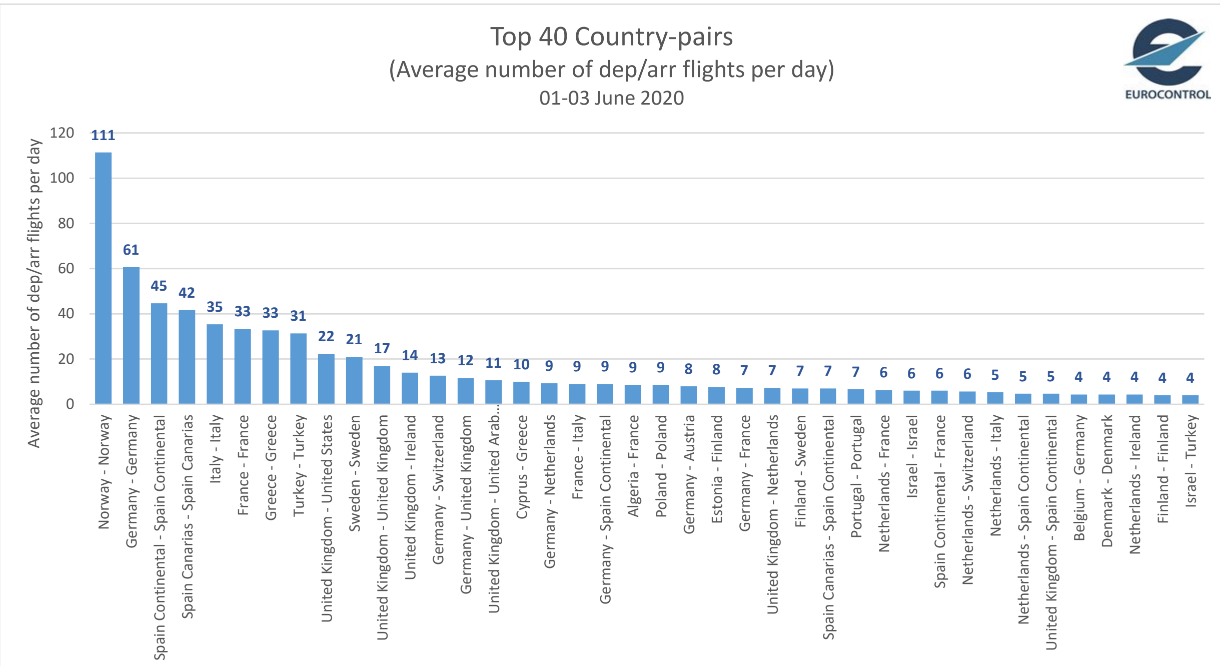
- When zooming in on April and May, a constant but slight recovery is clearly visible at network level since mid-April both in terms of variation against 2019 and in absolute number of flights (using 7-day moving average for both indicators).



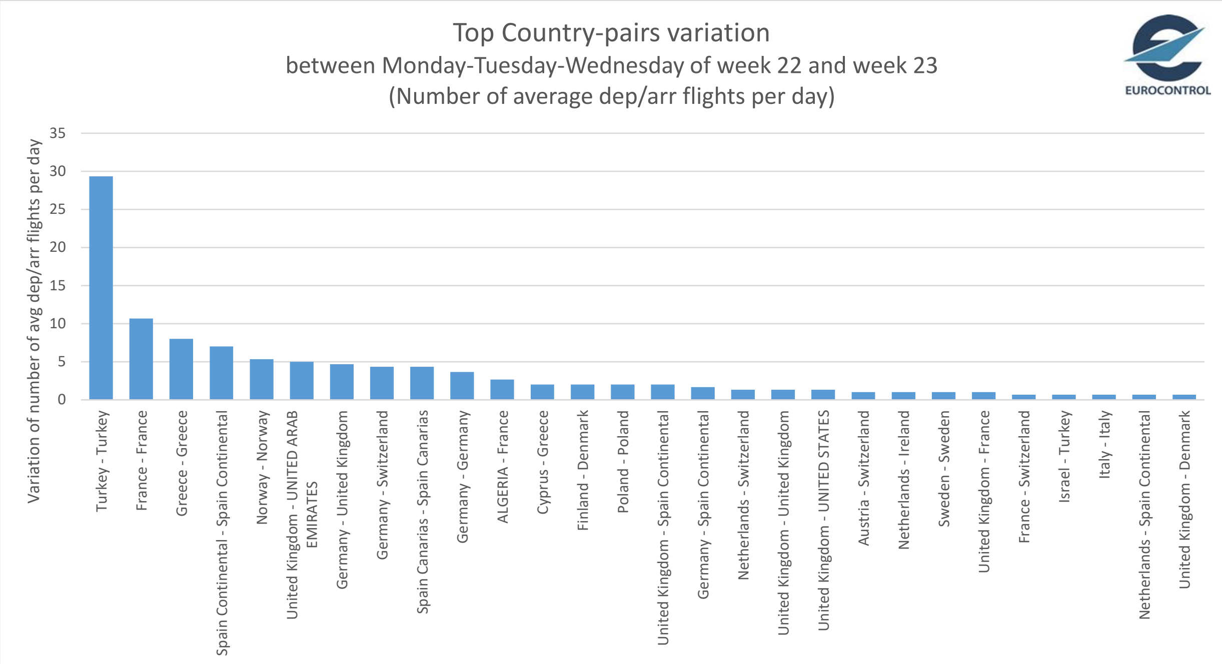




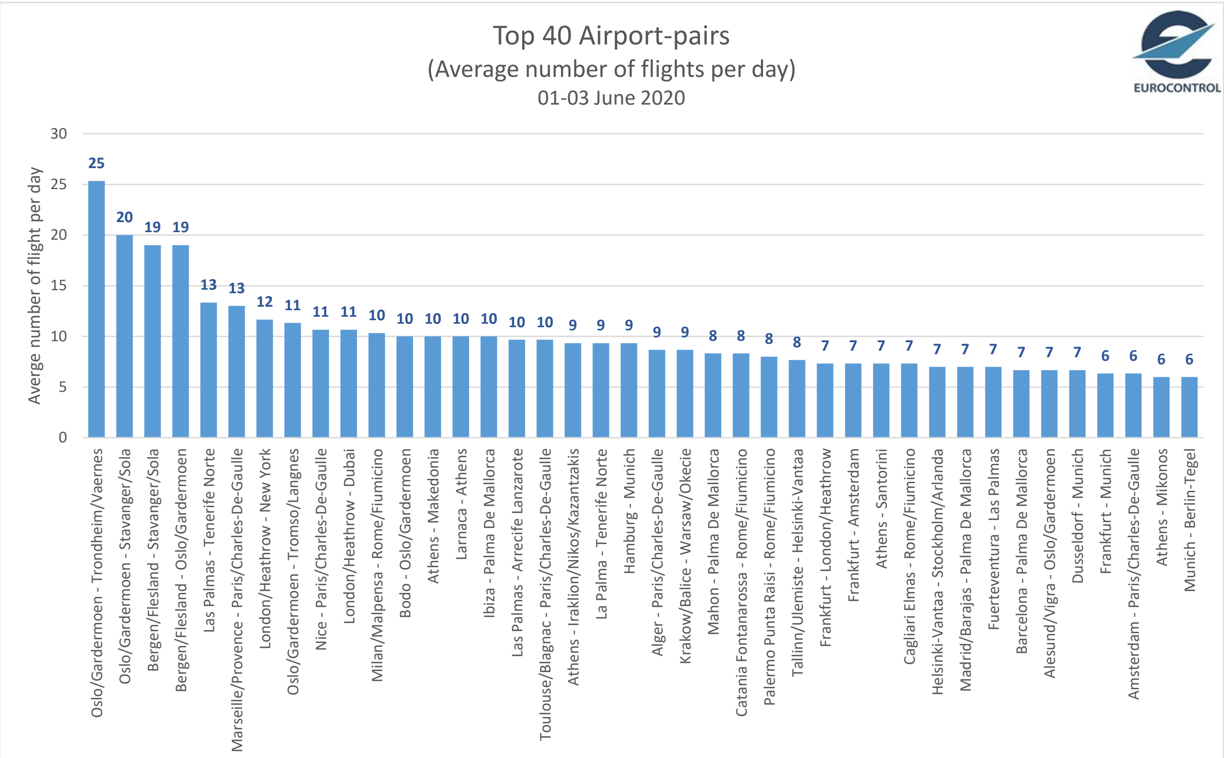
- When considering departing and arriving flights per country-pairs over the first 3 days of June, the domestic flow within Norway is clearly the highest with 111 dep/arr flights a day on average. Moreover, the top flows are mainly domestic flows.



- When comparing the first 3 days of week 22 (25-27 May) to the first 3 days of week 23 (1-3 June), the flows which increased the most were the domestic flights within Turkey (+29 dep/arr flights per day on average), then within France (+11), Greece (+8), Spain (+7) and Norway (+5).

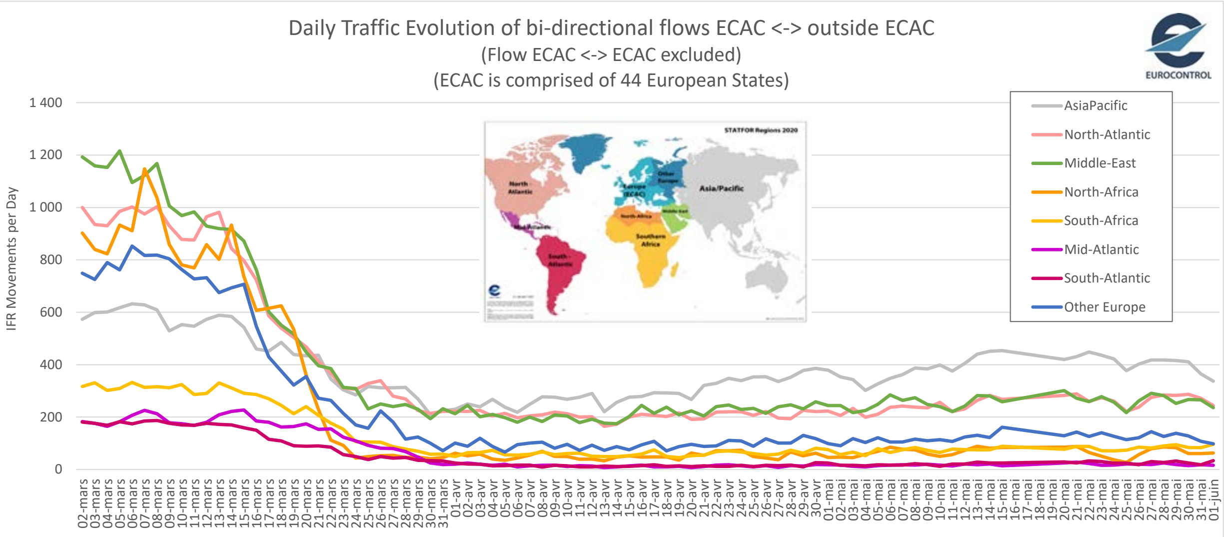


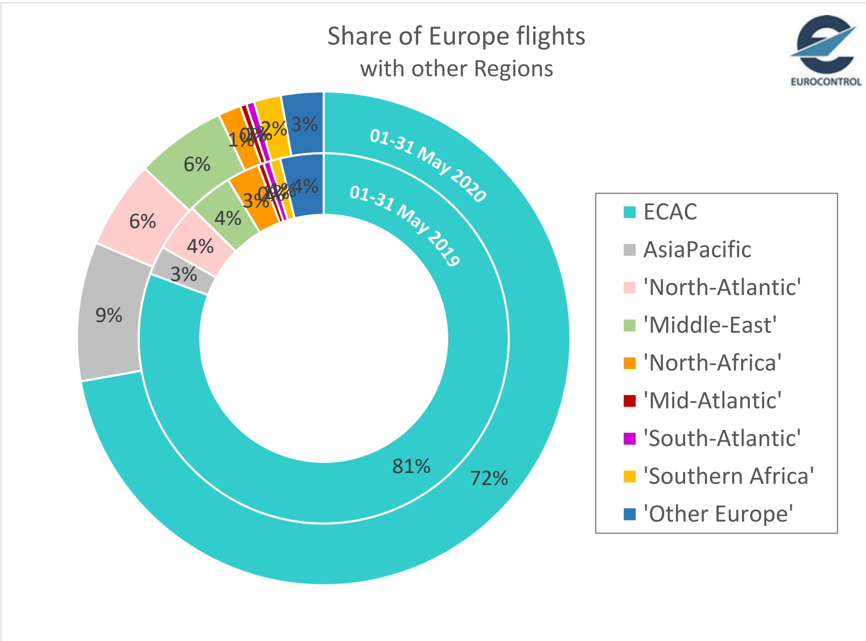
- This analysis can be extended to airport pairs over the same first 3 days of June 2020. Apart from the flows between Norwegian airports which accounts for more than 19 dep/arr flights a day on average (reaching 25 between Oslo and Trondheim), Las Palmas/Tenerife is 5th with 13 together with Marseille/Paris CDG. All other top 40 airport pairs are around 6-10 dep/arr flights a day on average.



2. ECAC – Worldwide Regions Traffic:

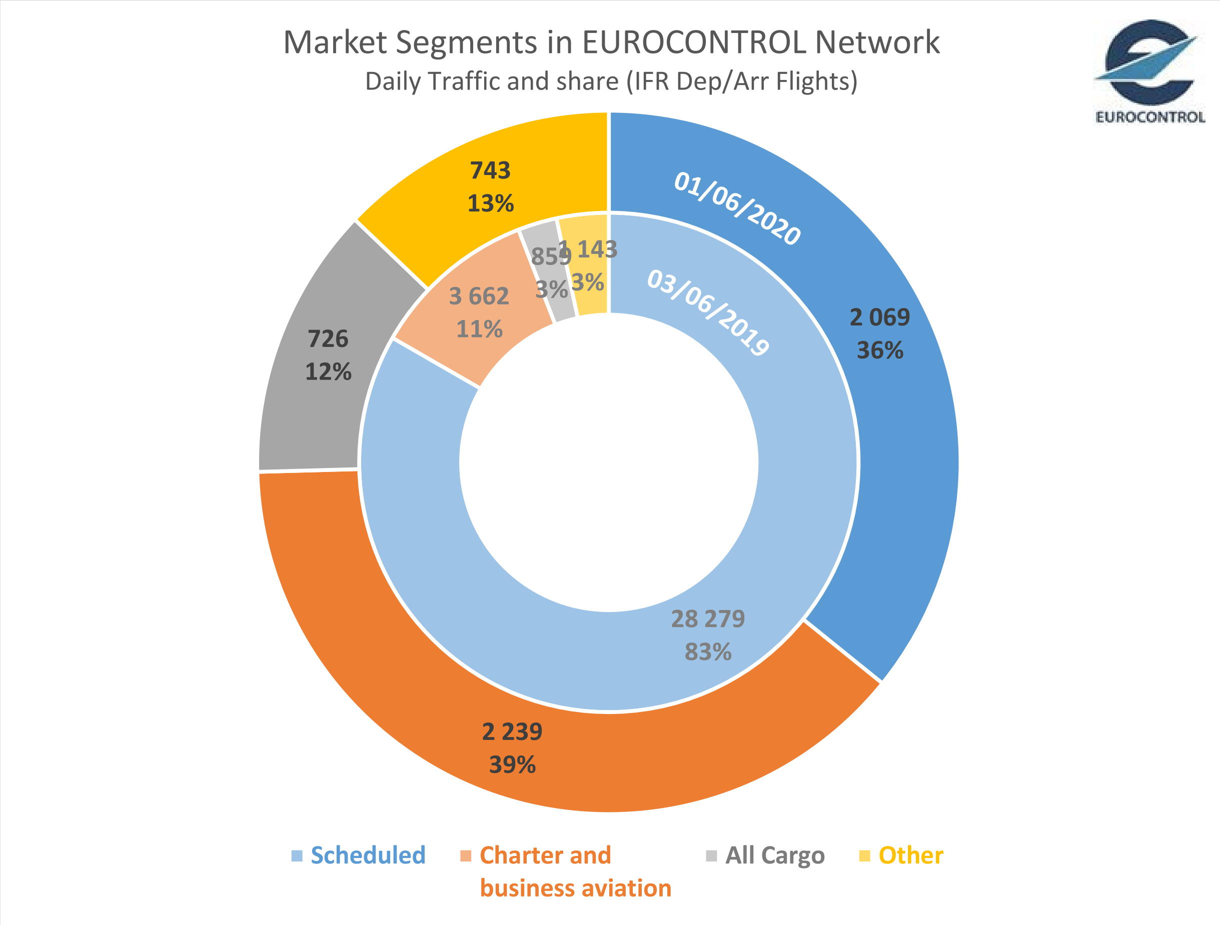
- In March, all bi-directional traffic flows between ECAC and other regions in the world decreased with various dynamics and amplitude. The flow with Asia/Pacific is now the largest share of traffic to/from ECAC at 9% and is now stable since 15 May after having reached a minimum of -70% on 5 April.



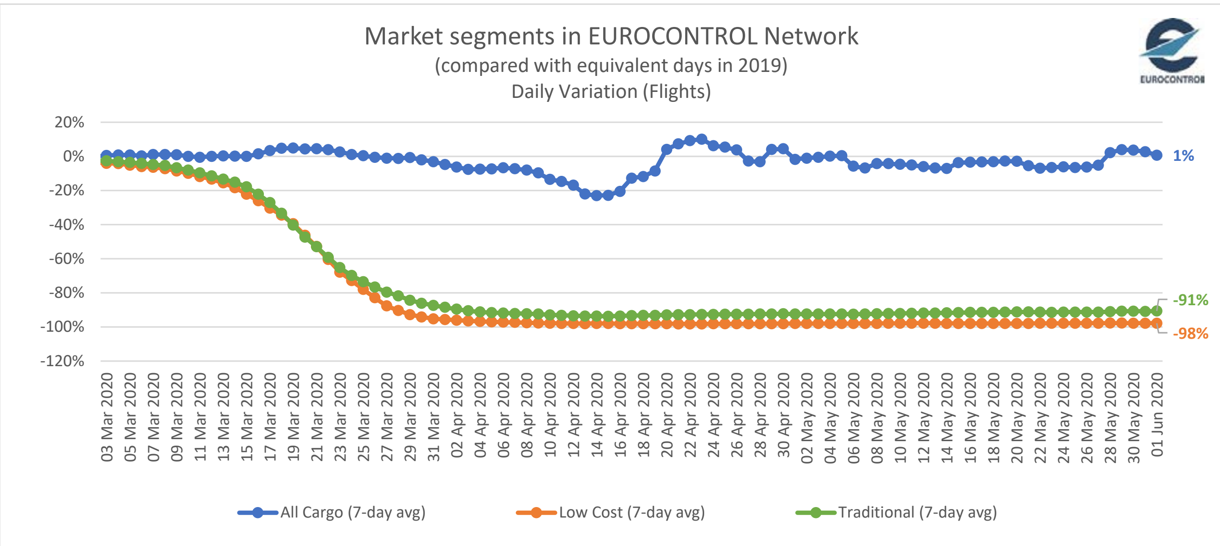


3. Market Segments (Up to 1 June 2020)

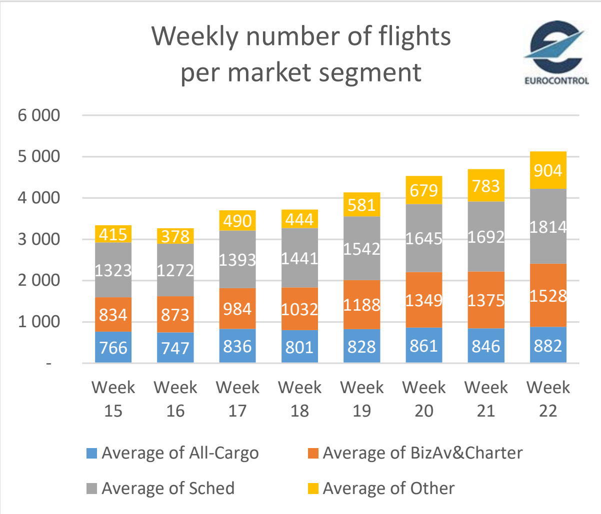
- This time last year, all-cargo flights accounted for about 3% of total Departure / Arrival flights, whereas now, it accounted for 12% on 1 June 2020. The share of scheduled traffic, which accounted for 83% reduced to 36% only.

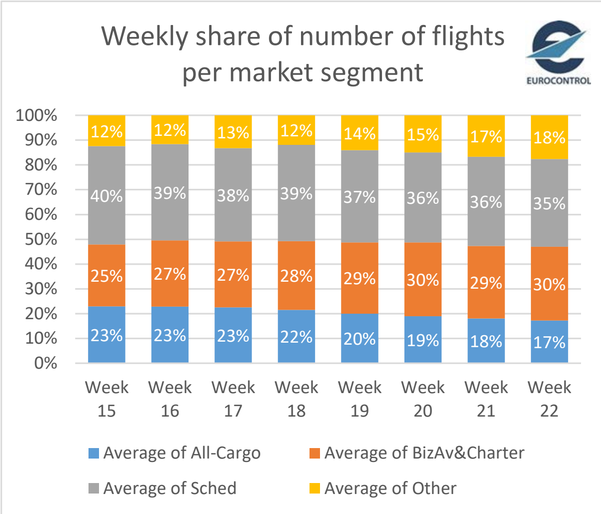


- During the crisis, all-cargo flights remained stable at the 2019 level with a variation around the Easter period (both 2019 and 2020) while scheduled and low-cost traffic reduced by 91% (respectively 98%) during the crisis.

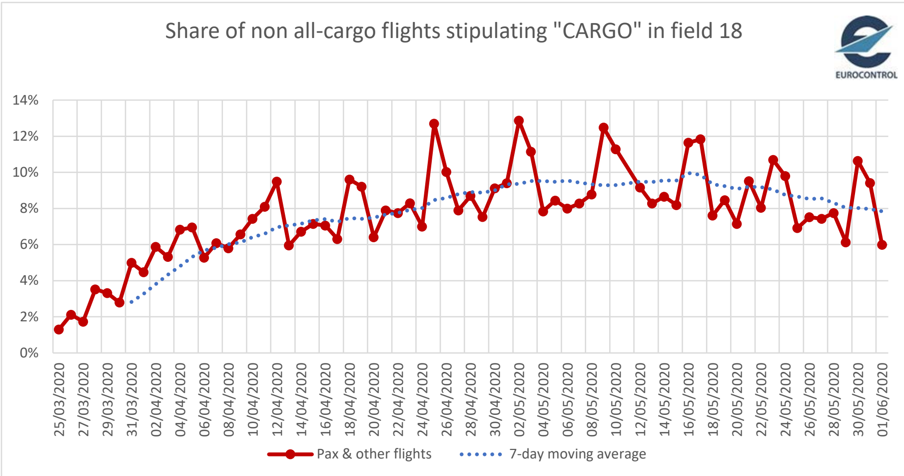


- As shown below, the traffic per market segment is slightly increasing since week 16 and all cargo flights, despite increasing in absolute terms, see their share slightly reducing as they increased less than other market segment flights.

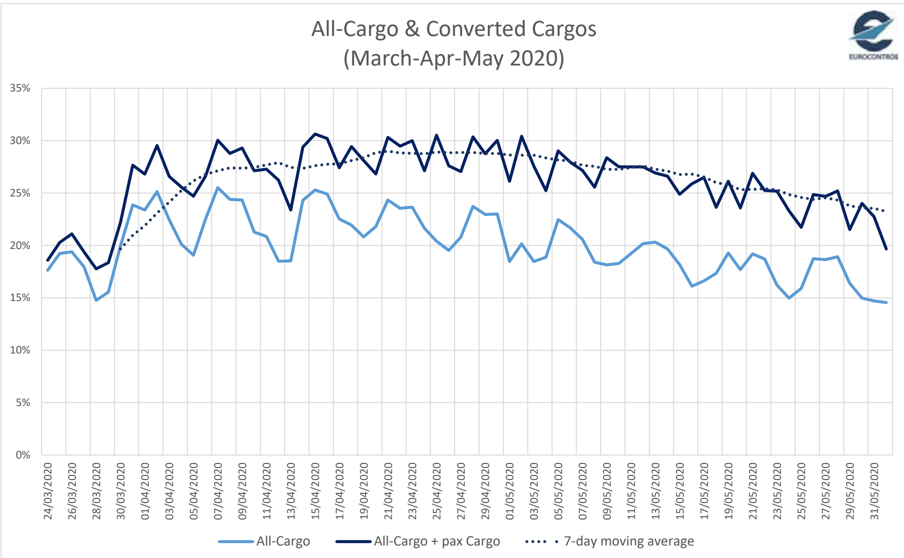




- The previous charts were showing all cargo flights. However, since the beginning of this crisis, we have seen some pax and other aircraft being used purely for cargo. While being difficult to estimate, a statistical analysis using the word “CARGO” in field 18 of the flight plan provides some useful information as shown on the chart on the right-hand side. Over the very recent days, the share decreased slightly compared to the previous week 8% on average (compared to 9%).

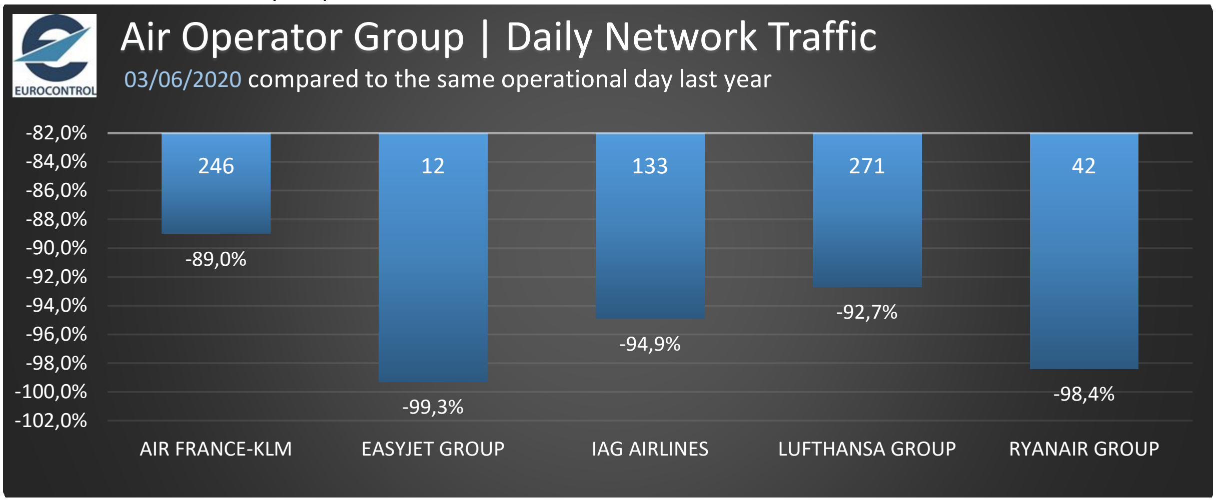


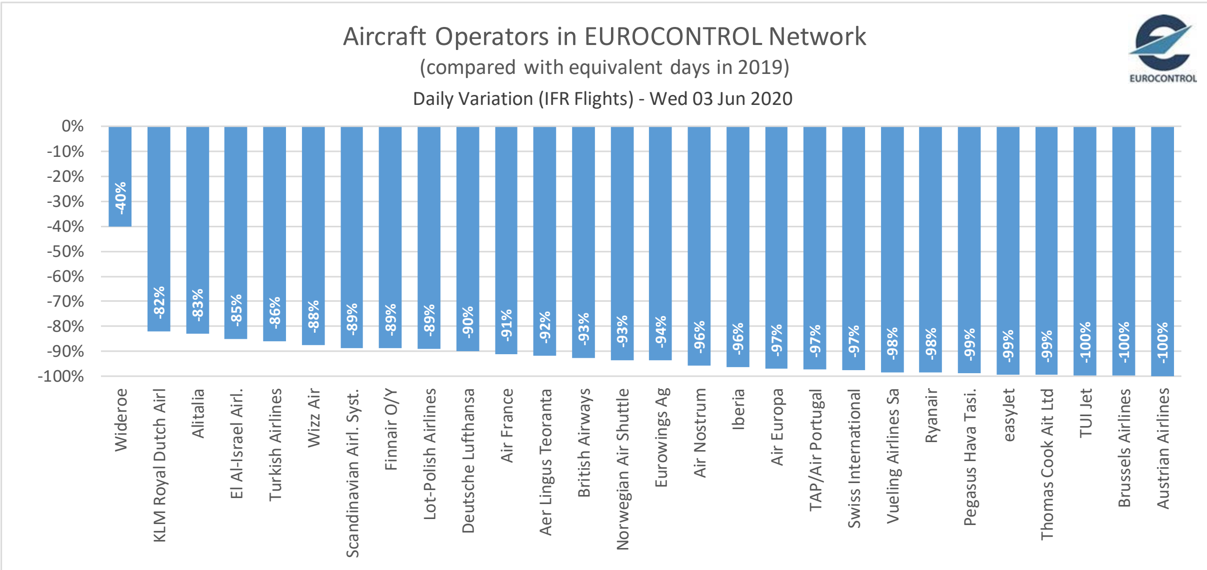
- The chart on the right-hand side show a growing number of cargo flights in passenger & other non-cargo aircraft. All together all-cargo + pax cargo represented a share of 24% during week 22, a 1 percentage point downwards change compared to week 21 which was around 25%.

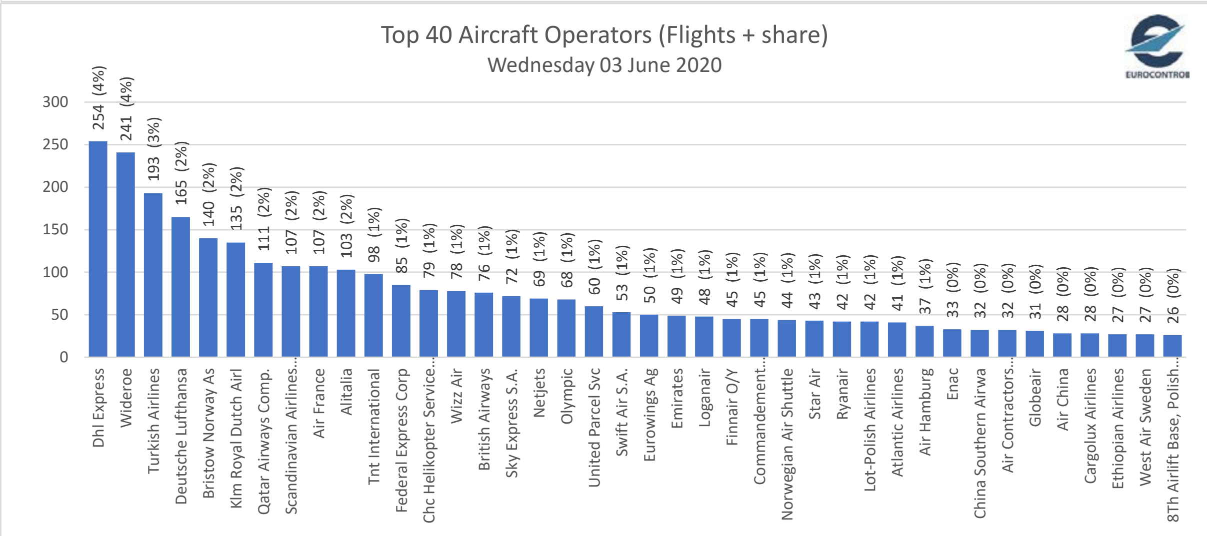


4. Airlines

- For the largest Air Operator Groups, the reductions on **Wednesday 3 June** were: easyJet -99.3%, Ryanair Group -98.4%, IAG Airlines -94.9%, Lufthansa Group -92.7% and Air-France-KLM -89.0%.
- On Wednesday 3 June, Austrian Airlines, Brussels Airlines and TUI Jet had almost no flights. easyJet and Pegasus were -99%. Ryanair and Vueling -98%, Swiss and TAP -97%, Iberia -96%, British Airways -93%, Air France -91%, Lufthansa -90%, SAS and LOT -89%, Turkish airlines -86%, Alitalia -83%, KLM -82% and Widerøe -40%.
- DHL Express was the busiest airline with 254 movements, followed by Widerøe (241), Turkish Airlines (193), Lufthansa (165), Bristow Norway (140), KLM (135), Qatar Airways (111), SAS (107) and Air France (107).

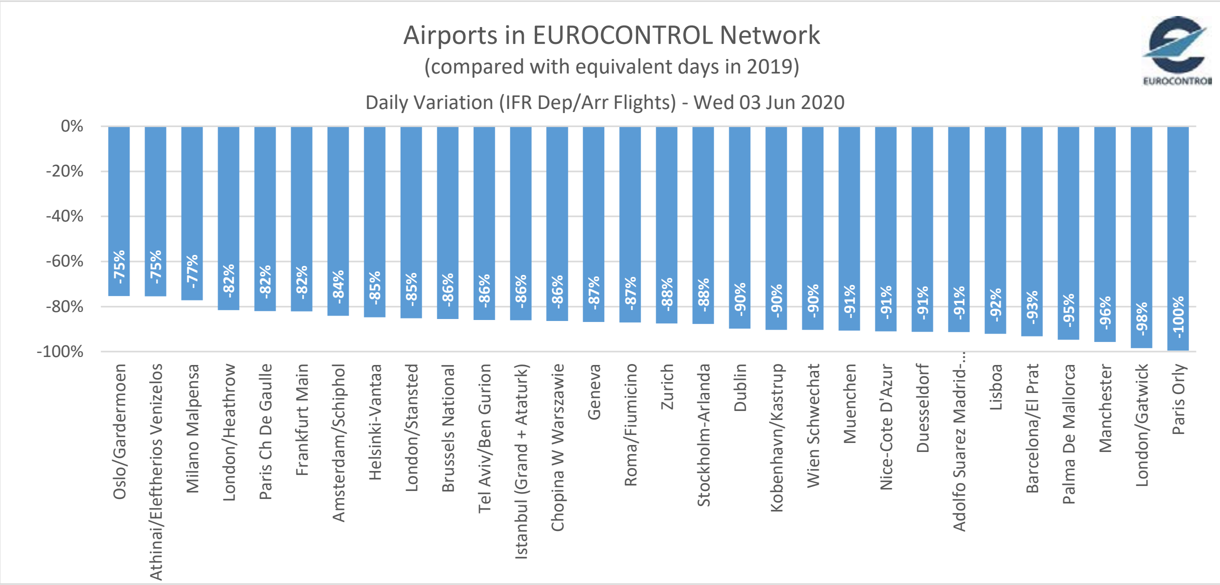


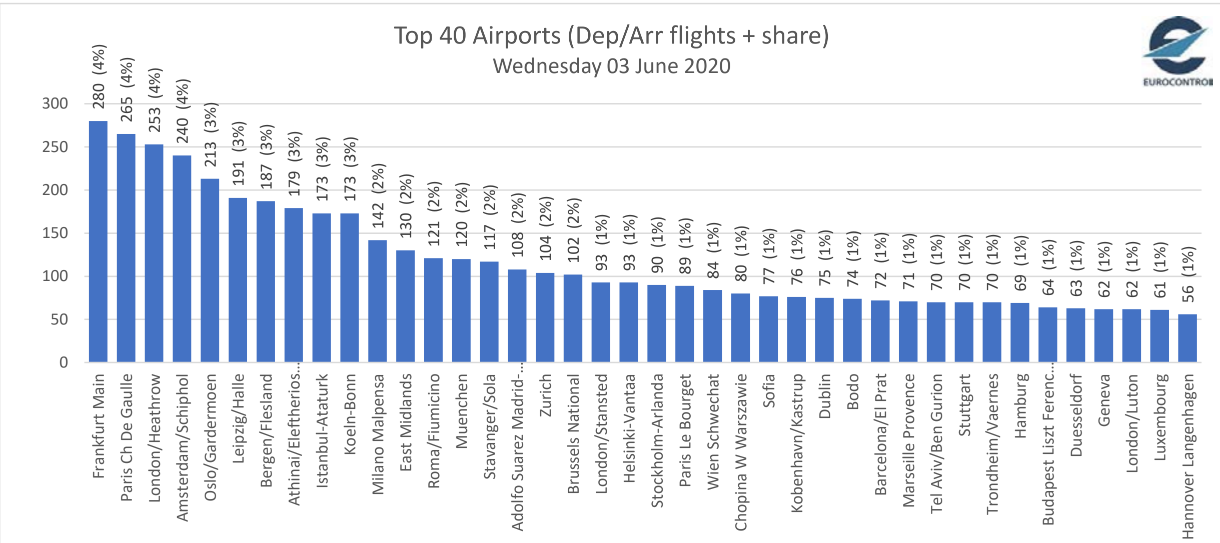




5. **Airports:**

- On **Wednesday 3 June**, virtually all of Europe's largest airports are managing 80% fewer flights compared to last year, examples: Paris Orly was -100% with 3 flights, London Gatwick was -98%, Madrid -91%, Munich -91%, Vienna -90%, Dublin -90%, Roma -87%, Warsaw -86%, Istanbul -86%, Amsterdam -84%, Frankfurt -82%, Paris CDG -82%, London Heathrow -82%, Athens -75% and Oslo -75%.
- On Wednesday 3 June, Frankfurt was the busiest airport with 280 movements, followed by Paris CDG (265), London/Heathrow (253), Amsterdam (240), Oslo (213), Leipzig (191), Bergen (187), Athens (179), Istanbul (173) and Koln/Bonn (173).





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.