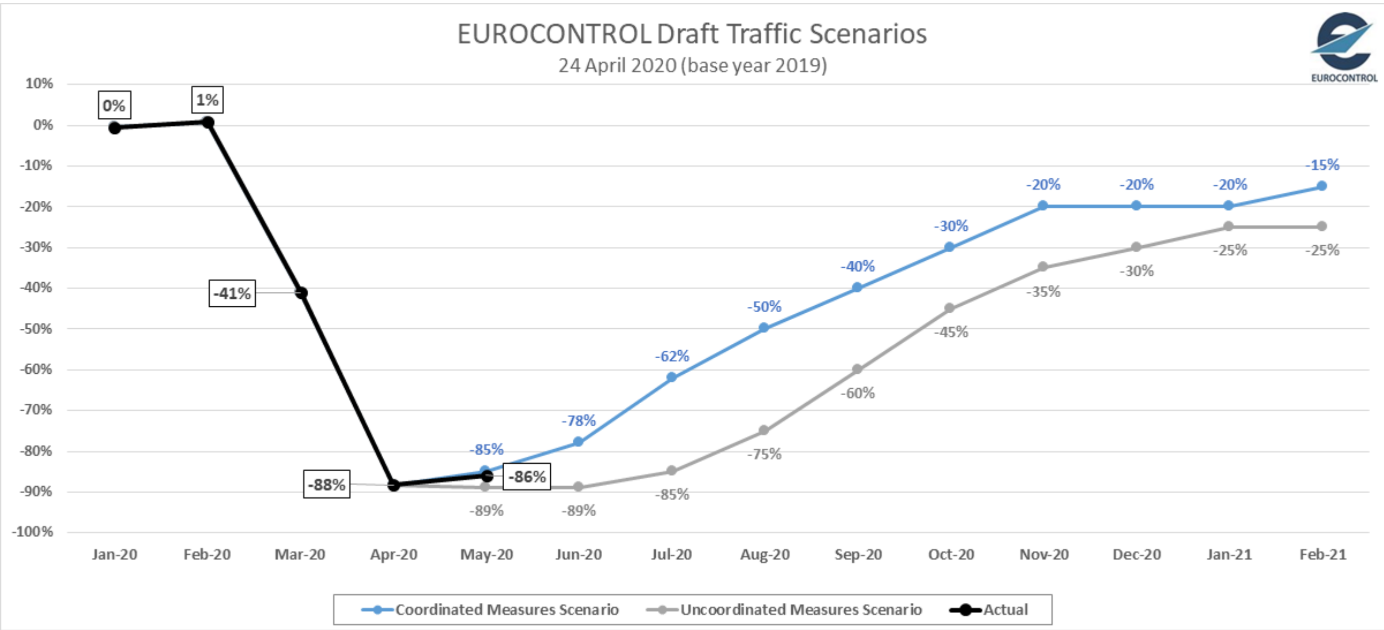
COVID19 Impact on European Air Traffic
EUROCONTROL Comprehensive Assessment

Air Traffic situation: Wednesday 10 June 2020
& mid Week 24 (08-10 June 2020)
(compared with equivalent period in 2019)

Key Highlights

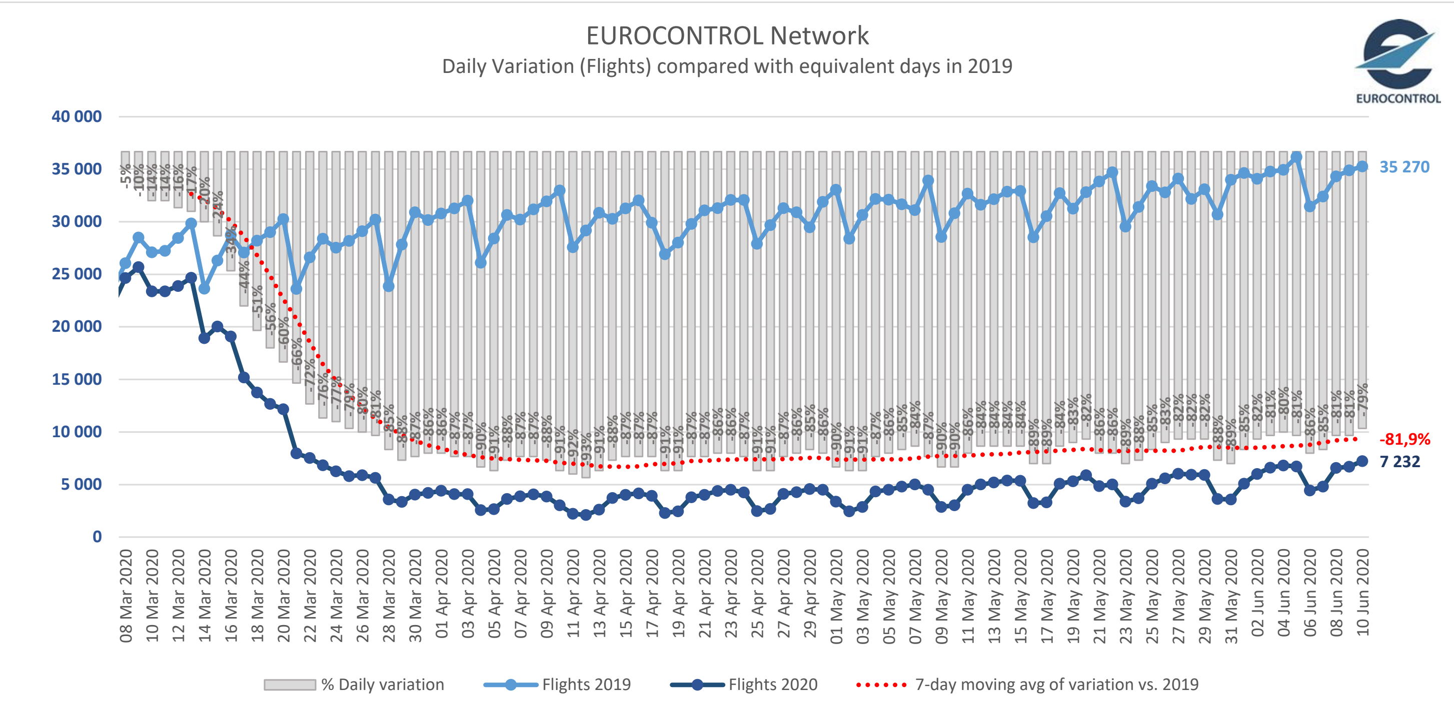
- **7,323 flights yesterday 10 June (+9.2% against Wednesday 3 June)**
- **Trend is up with a large pick-up expected from 22 June. By mid-July, we expect 12,400 flights, which is expected to rise as more flights are lodged (mainly intra-European).**
- **Chinese domestic now at 88% of 2019 levels with load factors averaging at 65.2%. International volumes remain low.**
- **North American planning a resumption of services on the North Atlantic to approximately +35% of normal capacity over the coming weeks.**
- **July schedules for Europe are now clearer for many intra-Schengen operations.**
- **New quarantine procedures introduced in UK and Ireland is effectively preventing operations planning for July to those States.**
- **The EASA/ECDC guidelines have been helpful but the temptation to locally modify them is not helpful.**
- **The traffic scenarios we projected on 24 April remain valid for a coordinated opening and EUROCONTROL is becoming more optimistic.**



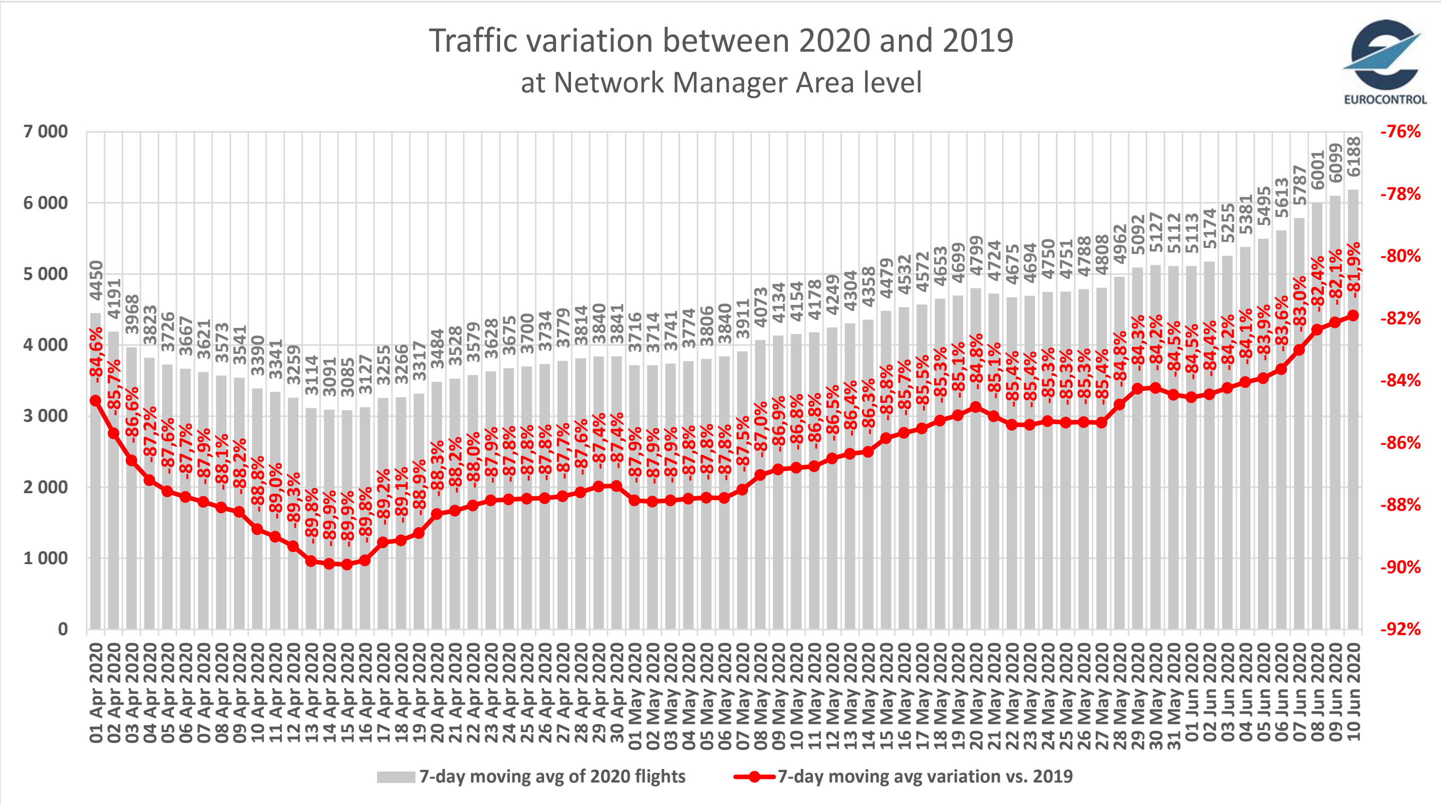
1. Summary points on the network situation:

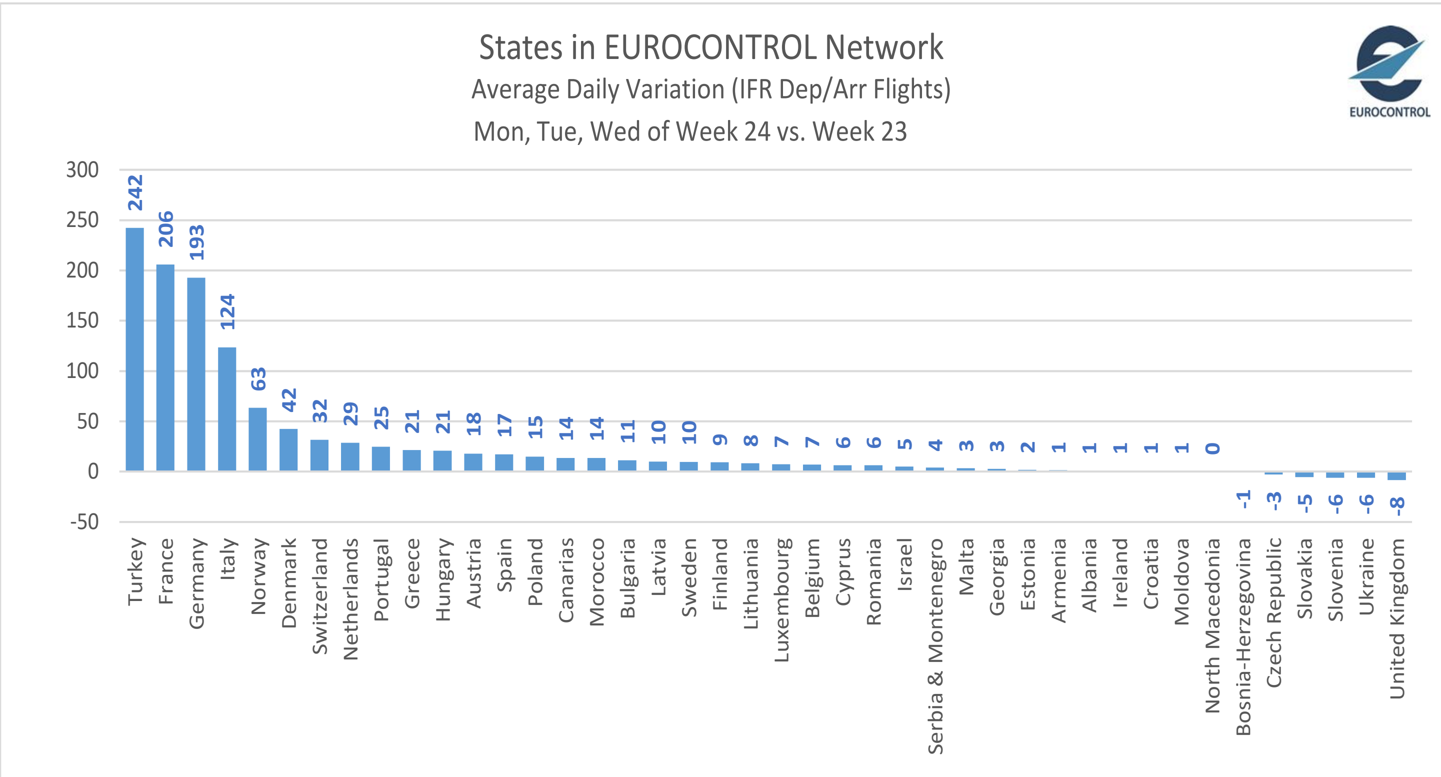
- **NM Network flights Wed 10 June: 7,232 flights** **-79.5%** (**28,038** fewer flights)
    - o Increase of +622 movements on the previous Wednesday (3 June).
    - o More than 7,000 flights for the first time since Sunday 22 March.
    - o Turkish Airlines was the busiest operator with 310 movements, followed by DHL Express (255), Widerøe (250), Lufthansa (176) and SAS (143).
    - o Istanbul (Ataturk, New Istanbul airport and Sabiha Gökçen) was the busiest TMA with 437 movements, followed by CDG (306), Frankfurt (292), Schiphol (263) and Heathrow (254).

- **Mid Week #24 (08-10 June): 6,839 flights (daily avg)** **-80.4%** (**83,967** fewer flights)
    - o Increase of +935 per day on the previous week (01-03 June) (i.e. +16%).
    - o Turkish Airlines was the busiest operator over these 3 days with an average of 299 movements per day, followed by Widerøe (245), Lufthansa (164), SAS (146), Air France (138) KLM (127) and Wizz Air (120).
    - o Over these 3 days, Paris/CDG was the busiest airport with an average of 298 movements per day followed by Istanbul (286), Frankfurt (277), Amsterdam (254) London Heathrow (241) and Oslo (221).

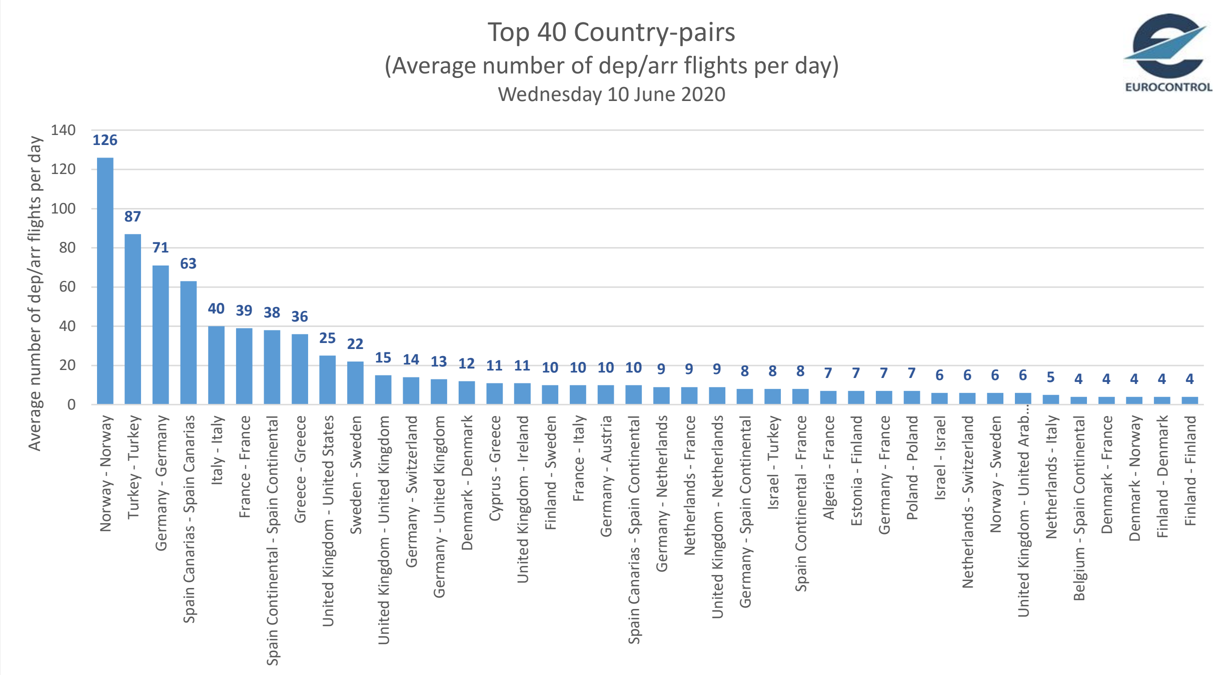


- When zooming in, a constant but slight recovery is clearly visible at network level since mid-April both in terms of variation against 2019 and in absolute number of flights (using 7-day moving average for both indicators).

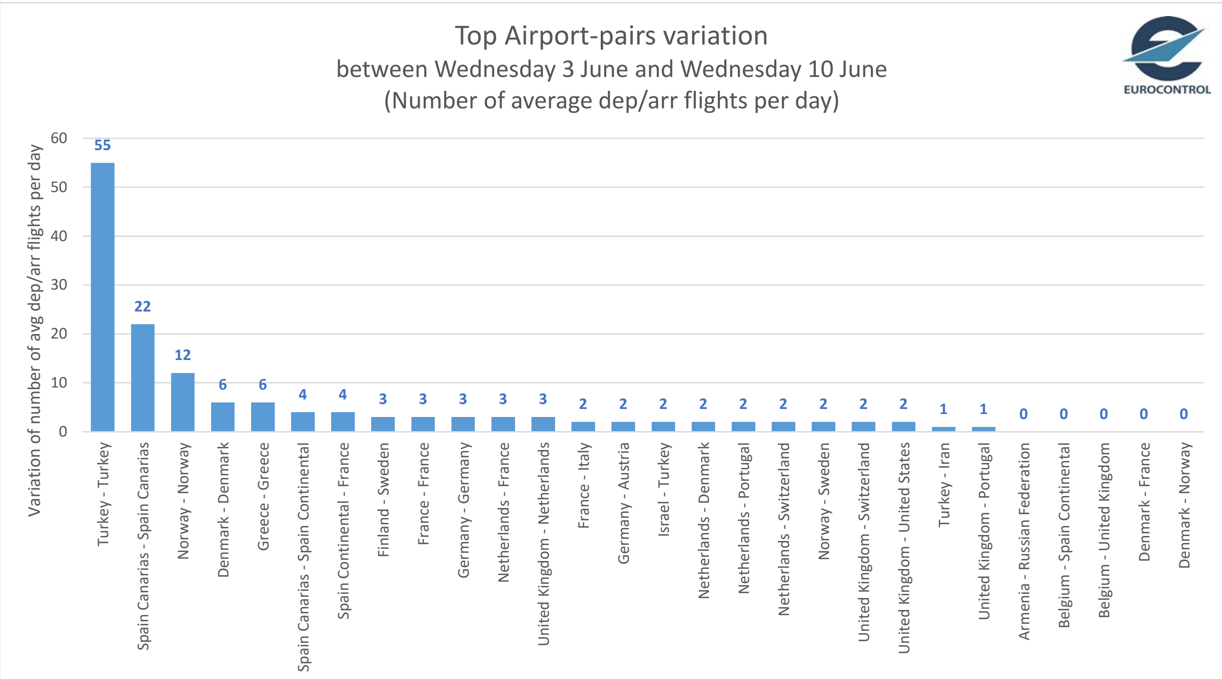




- When considering departing and arriving flights per country-pairs on Wednesday 10 June, the domestic flow within Norway was clearly the highest with 126 dep/arr flights a day on average, followed by Domestic flights within Turkey, Germany, Spain, Italy, France and Greece.

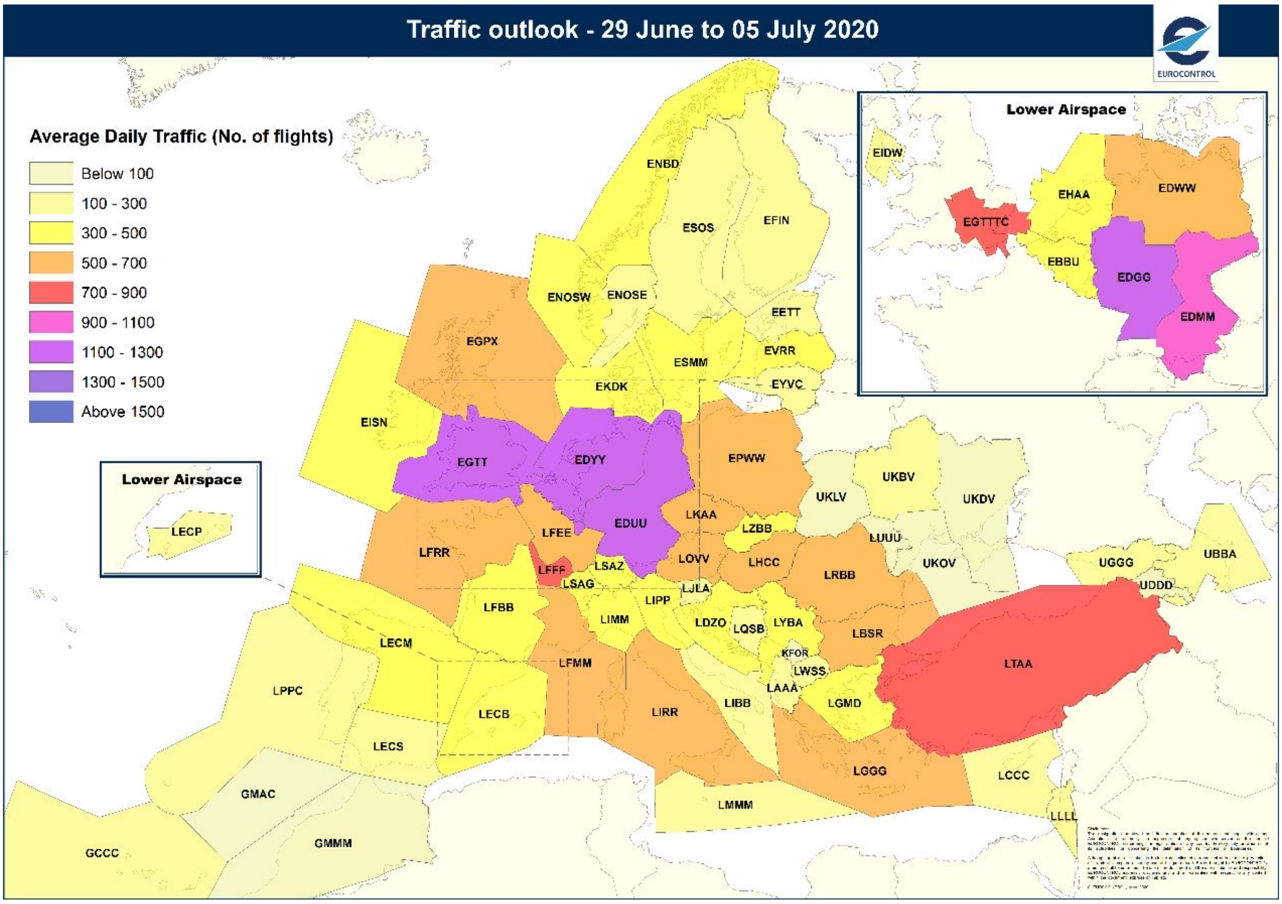


- Between Wednesday 3 and 10 June, the flows which increased the most were the domestic flights within Turkey (+55 dep/arr flights per day on average), followed by the flows between Spain (+22) and Norway (+12).



2. Return to Operations

- **Latest EUROCONTROL European Network Operations (NOP) 2020 Recovery Plan:**
  https://www.eurocontrol.int/news/eurocontrol-nm-publishes-network-recovery-plan
  [NOP 2020 Recovery Plan covers a rolling four-week period and is updated by the EUROCONTROL Network Manager on a weekly basis. It consolidates data from around 350 airlines, 68 area control centres (ACCs), 55 airports and 43 State.]
    - o As per 5 June 2020 publication: The network traffic is expected to reach around 9,000 flights during the second half of June 2020, getting close to 10,400 flights on some days in early July.
    - o Further indications since the last publication: Week of 6 July – 12 July could see up to 12,400 flights

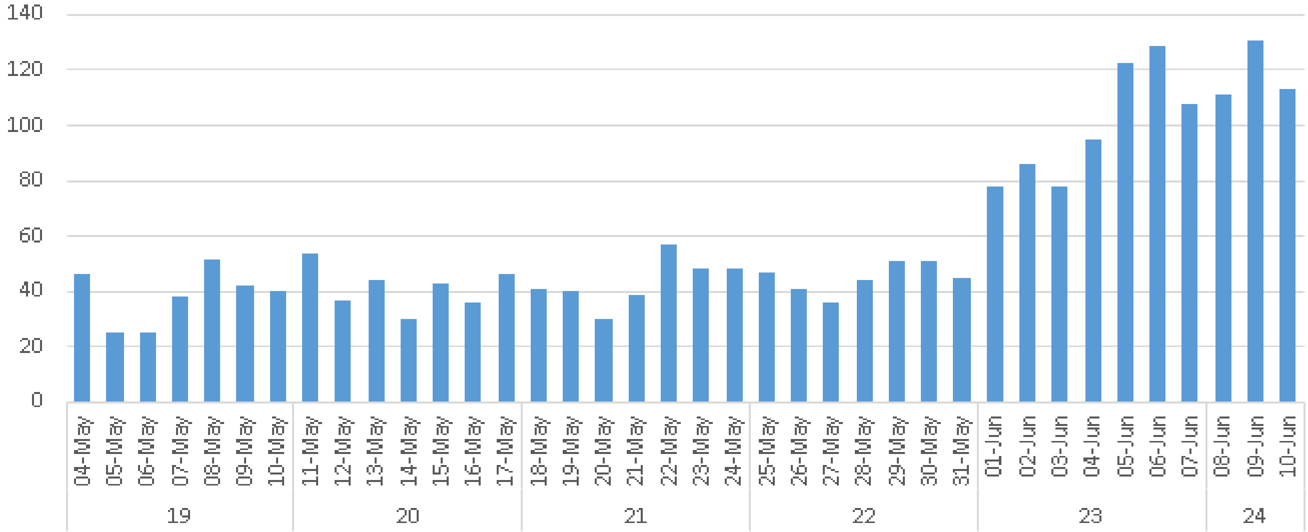


Average Daily Traffic

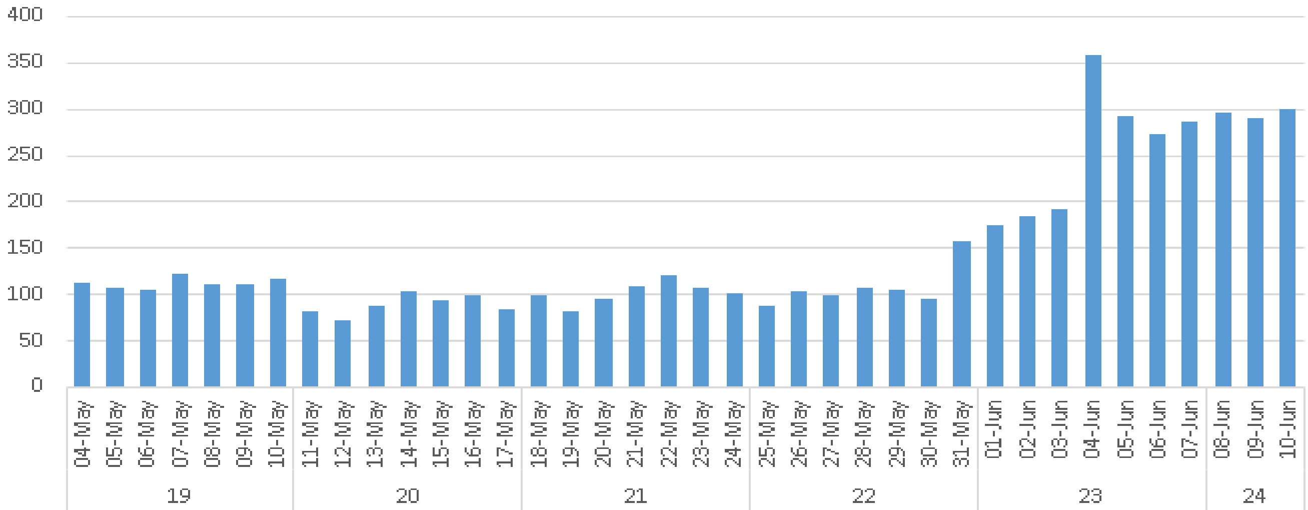
EUROCONTROL European Network Operations (NOP) 2020 Recovery Plan, 5 June 2020

- **European Airline Examples**
    - o Wizz Air growth continued with movements up +50% week-on-week, connections being re-established, examples include Gatwick, Barcelona and Ben Gurion.
    - o The growth in Turkish Airlines traffic is largely domestic, a full relaunch of International traffic is being held back by the combination of local and international travel restrictions.
    - o The gradual increase in Lufthansa's movements (week-on-week from 165 to 176) is a quiet restoring of routes or increase in frequency Germany and other NM_AREA states since Monday 01 June.

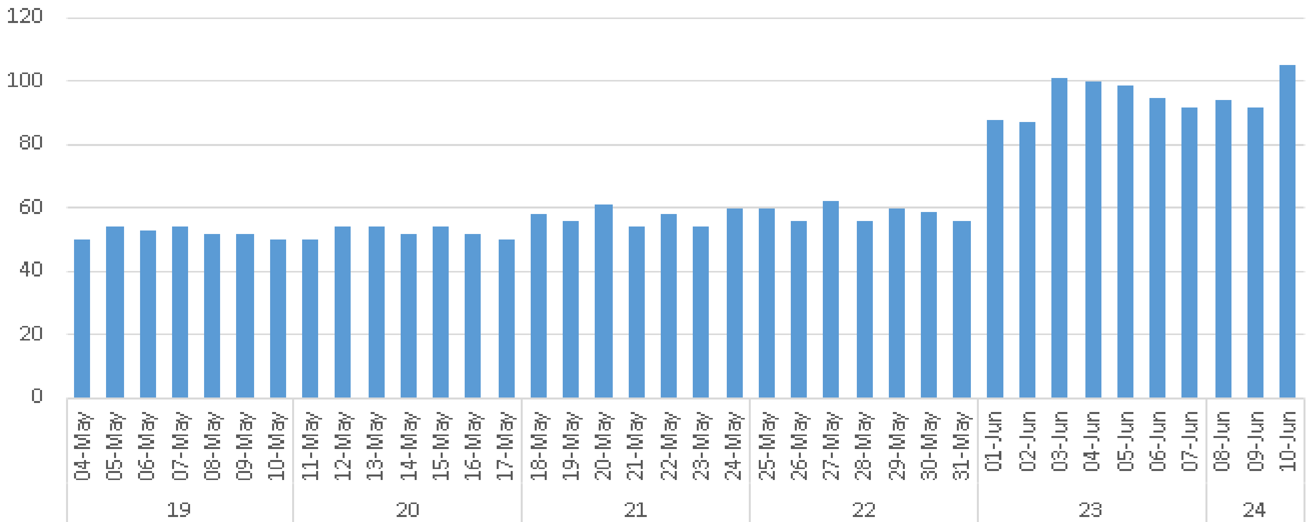
Flights:
Wizz Air (WZZ + WUK)



Flights:
Turkish Airlines (THY)



Flights:
Lufthansa (DLH) Inter NM_AREA states



- **Return to Operations – North America**
  (sourced via US FAA and OAG)
    - The number of departure seats totalled 5.57 million (w/c May 25), a modest rise of 1.4% compared with the previous seven days. However, the market remains 77% smaller than the same week a year ago. The US accounted for 5.35 million seats last week, while there were 214,910 departure seats in Canada.
    - The upward trend appears set to continue over the coming weeks as airlines gradually begin to restore routes and frequencies. The latest schedules data shows that **capacity from and within North America during June 2020 is expected to be about 3.28 million departure seats, a rise of 32% compared with May.**

    - ***North American Operations – Return to Operations Examples:***

  Southwest Airlines
    - Rremains the largest carrier in North America by capacity, offering 1.55 million seats last week. This is equivalent to 39% of its weekly capacity a year ago.

  United Airlines
    - As of July 06, United will add flights to London, Munich, Amsterdam, Brussels, Dublin, Tel Aviv and Zurich.
    - 14 additional daily flights will be added in August to those same destinations. The rest of their international European schedule has been pushed for an October 24 decision.

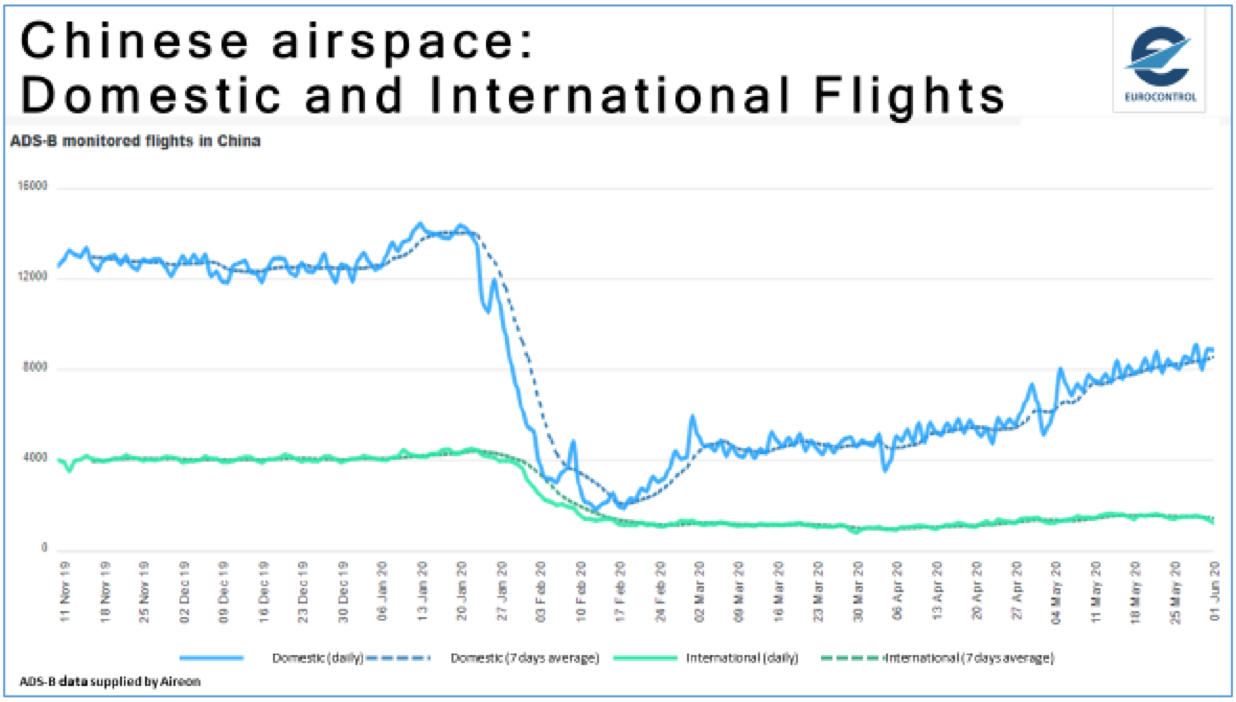
  Delta Airlines
    - June schedule will include flights to Amsterdam, London and Tel Aviv
    - July schedule will add 8 additional daily flights
    - August schedule will add approximately 30 daily flights
    - Delta will double its domestic capacity in July from May, after adding back 100 flights in June.

  American Airlines
    - On June 4 resumed service to Amsterdam, Frankfurt Paris and London.
    - American Airlines will operate 55% of its original domestic schedule in July, citing consistent improvement in summer leisure travel demand.

- **Return to Operations - Focus on China**

    - For the three weeks beginning May 11, scheduled domestic capacity was 80% as much as a year earlier or just below, compared with an average of 63% for most of March and April. This has since increased to 88% and the schedules for next week show 96% of last year’s equivalent domestic capacity is planned
    - Domestic passenger load factors have been weak. For May, the average was 65.2% with only a faint upward trend, according to Chinese data firm Variflight. This is not a result of regulation: there is no limit in China on passenger load factors or spacing on domestic flights to minimize infection, though international flights cannot be more than 75% full.

  Source: https://aviationweek.com/air-transport/airlines-lessors/daily-memo-chinese-domestic-capacity-near-90-2019-level

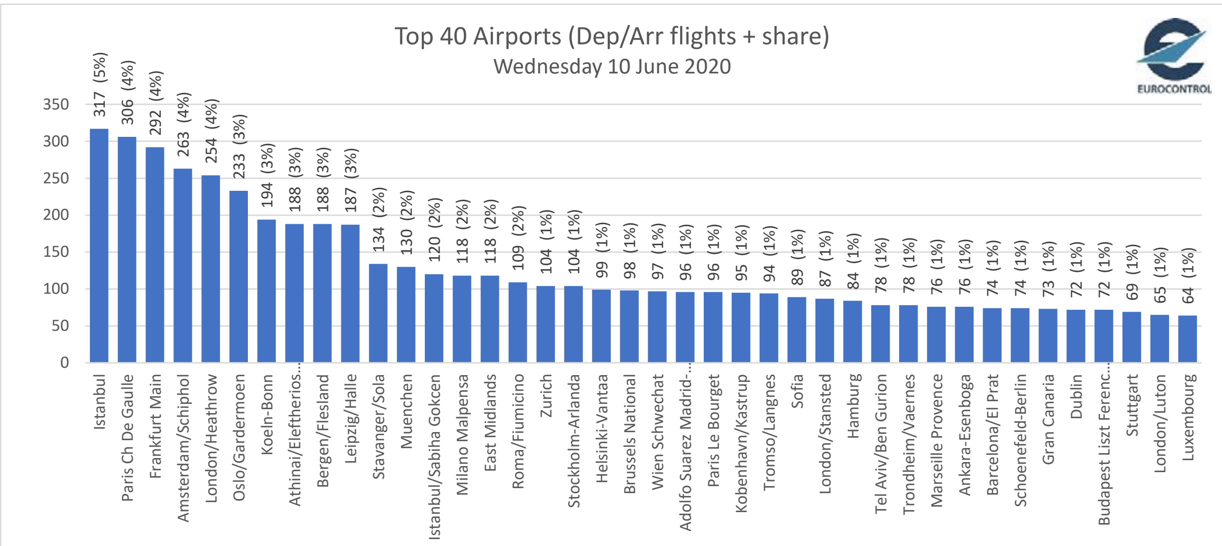


Chinese Traffic Recovery

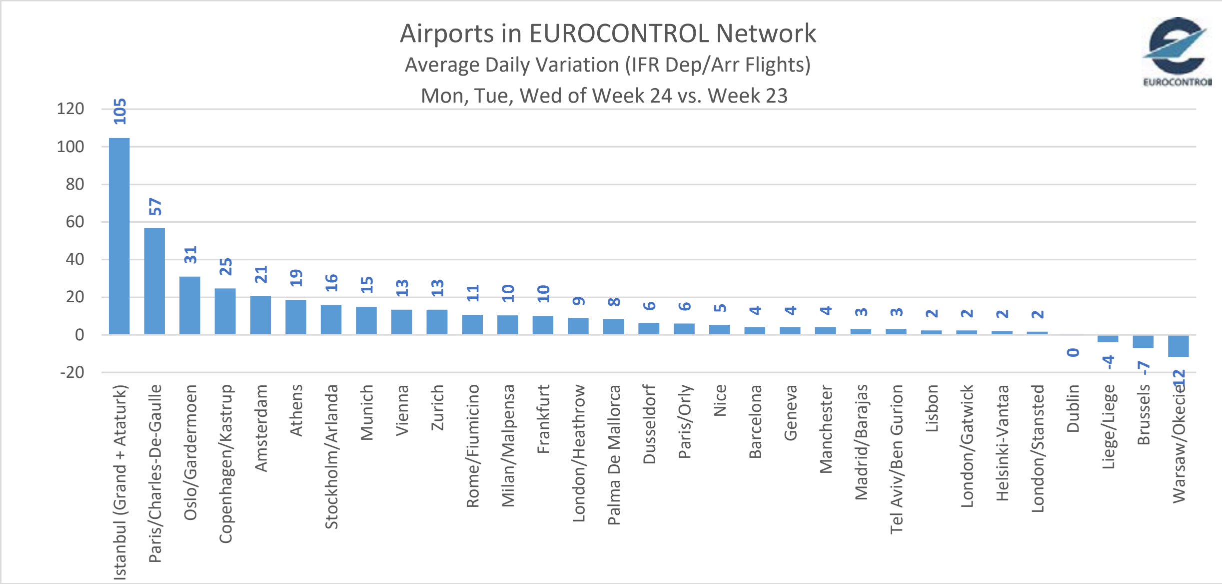
Source: EUROCONTROL NM using ADS-B data supplied by Aireon

3. Airports:

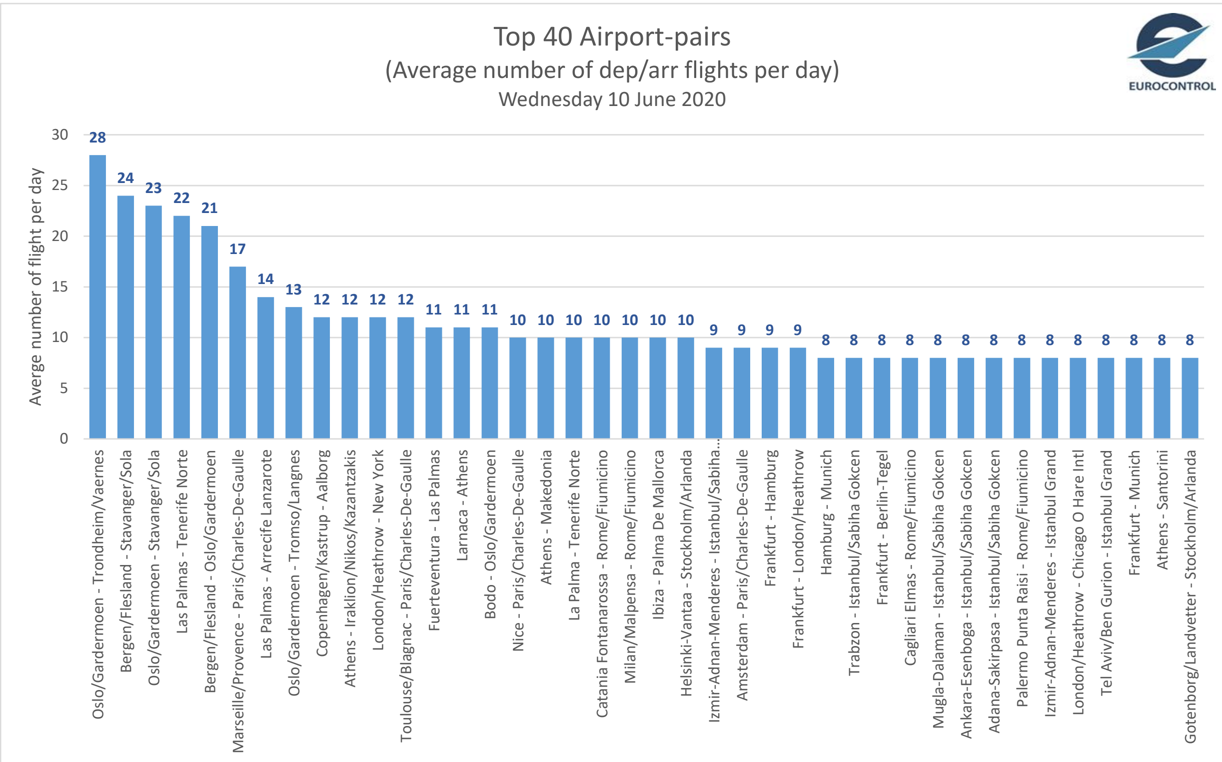
- On Wednesday 10 June, Istanbul was the busiest airport with 317 movements, followed by Paris/CDG (306), Frankfurt (292), Amsterdam (263), London/Heathrow (254) and Oslo (233).



- The largest variation of average daily flights between Monday, Tuesday and Wednesday of week 23 and week 24 was for Istanbul with 105 additional flight on average per day, followed by Paris CDG (+57).



- This analysis can be extended to airport pairs on Wednesday 10 June. Apart from the flows between Norwegian airports which accounts for more than 23 dep/arr flights a day on average (reaching 28 between Oslo and Trondheim), Las Palmas/Tenerife was 4th with 22, Marseille/Paris CDG was 6th with 17. All other top 40 airport pairs are around 8-10 dep/arr flights a day on average.



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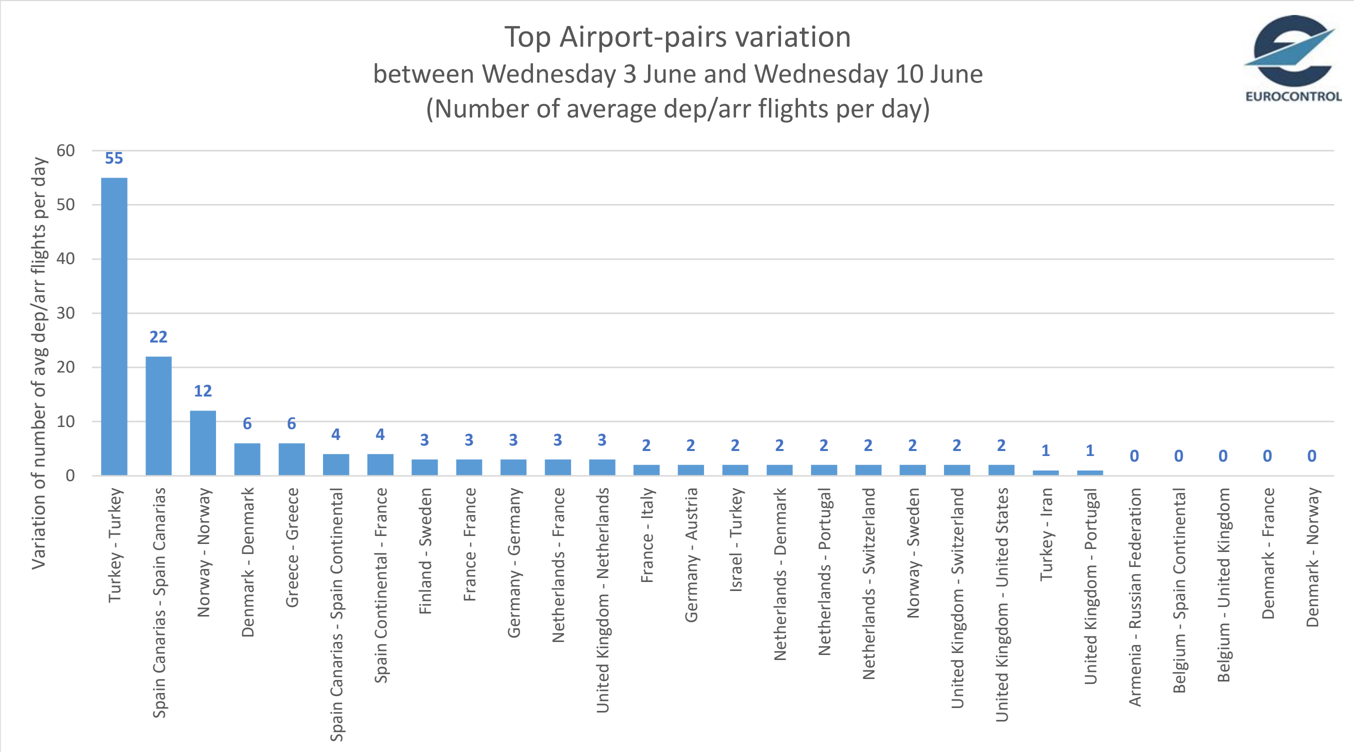

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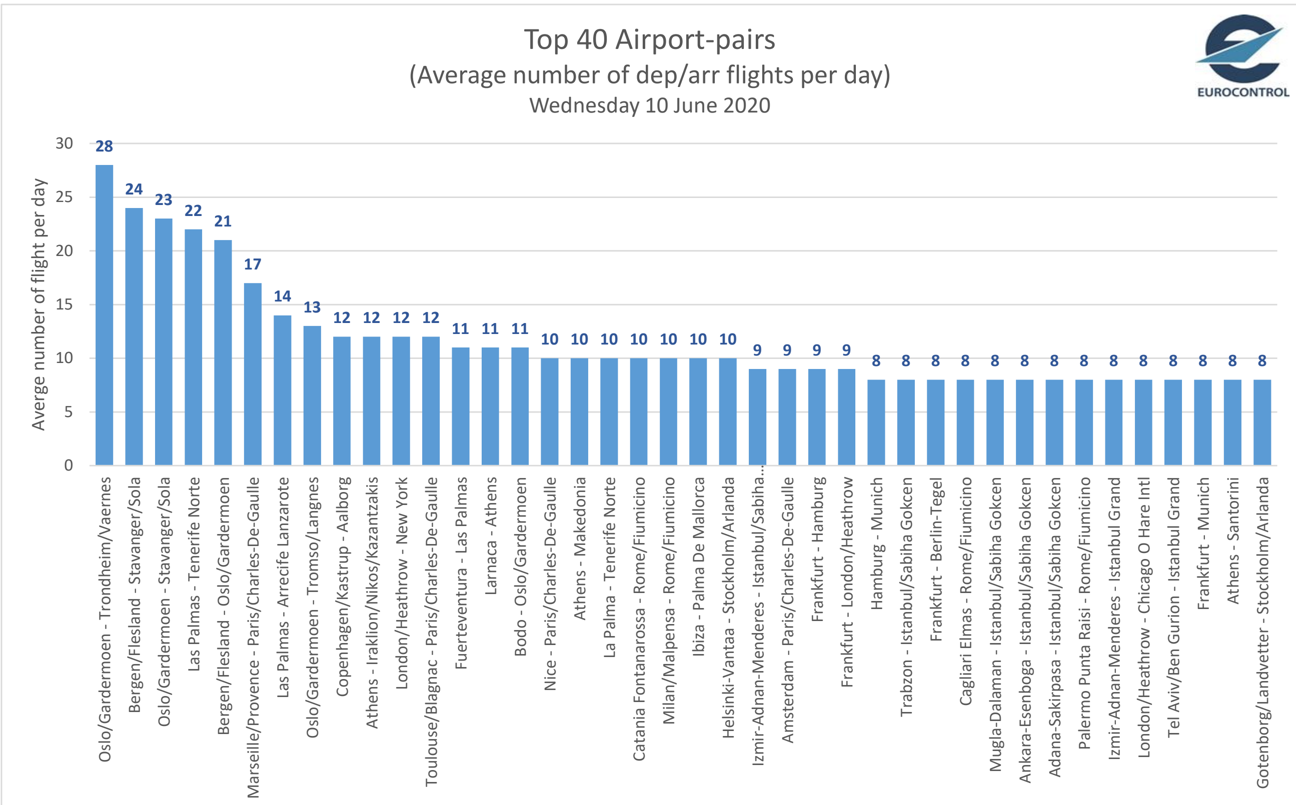
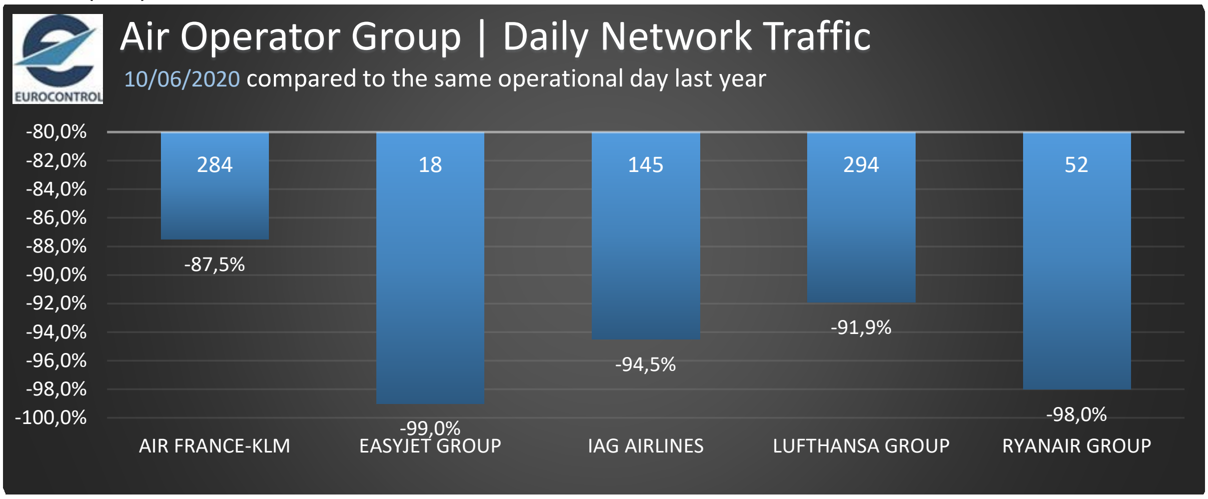
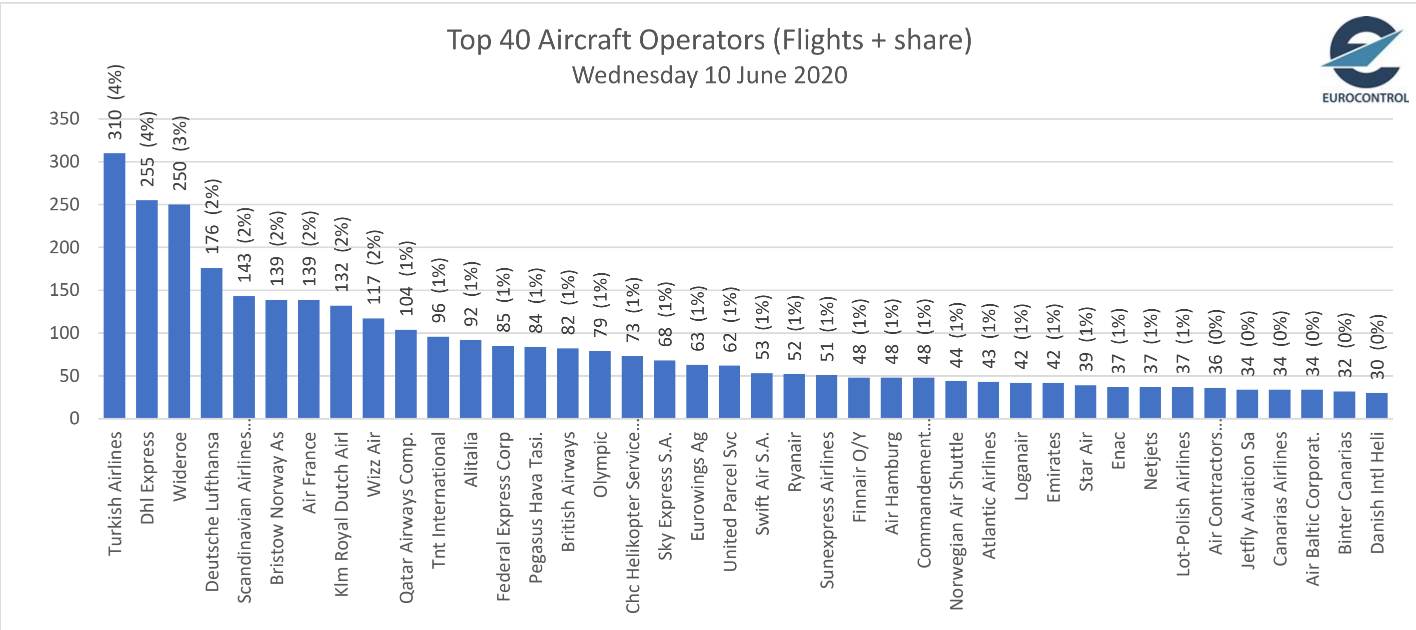


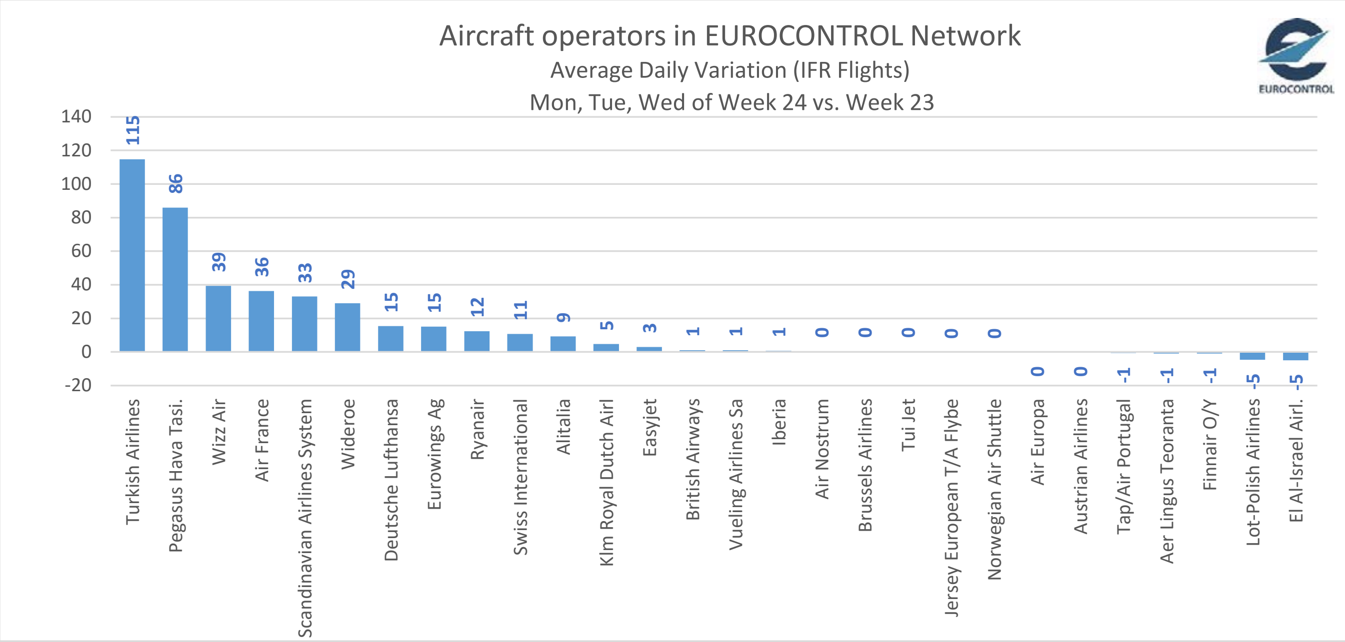
4. Airlines

- For the largest Air Operator Groups, the reductions on **Wednesday 10 June** were: easyJet -99.0%, Ryanair Group -98.0%, IAG Airlines -94.5%, Lufthansa Group -91.9% and Air-France-KLM -87.5%.
- On Wednesday 10 June, Austrian Airlines had no flights at all, TUI jet and Brussels only 2, easyJet was -99%, Ryanair -98%, TAP -98%, Iberia -97%, British Airways -92%, Lufthansa -89%, Air France -88%, SAS -86%, KLM -82%, Turkish airlines -78% and Widerøe -39%.
- Turkish Airlines was the busiest airline with 310 movements, followed by DHL Express (255), Widerøe (250), Lufthansa (176), SAS (143), Bristow Norway (139), Air France (139) and KLM (132).



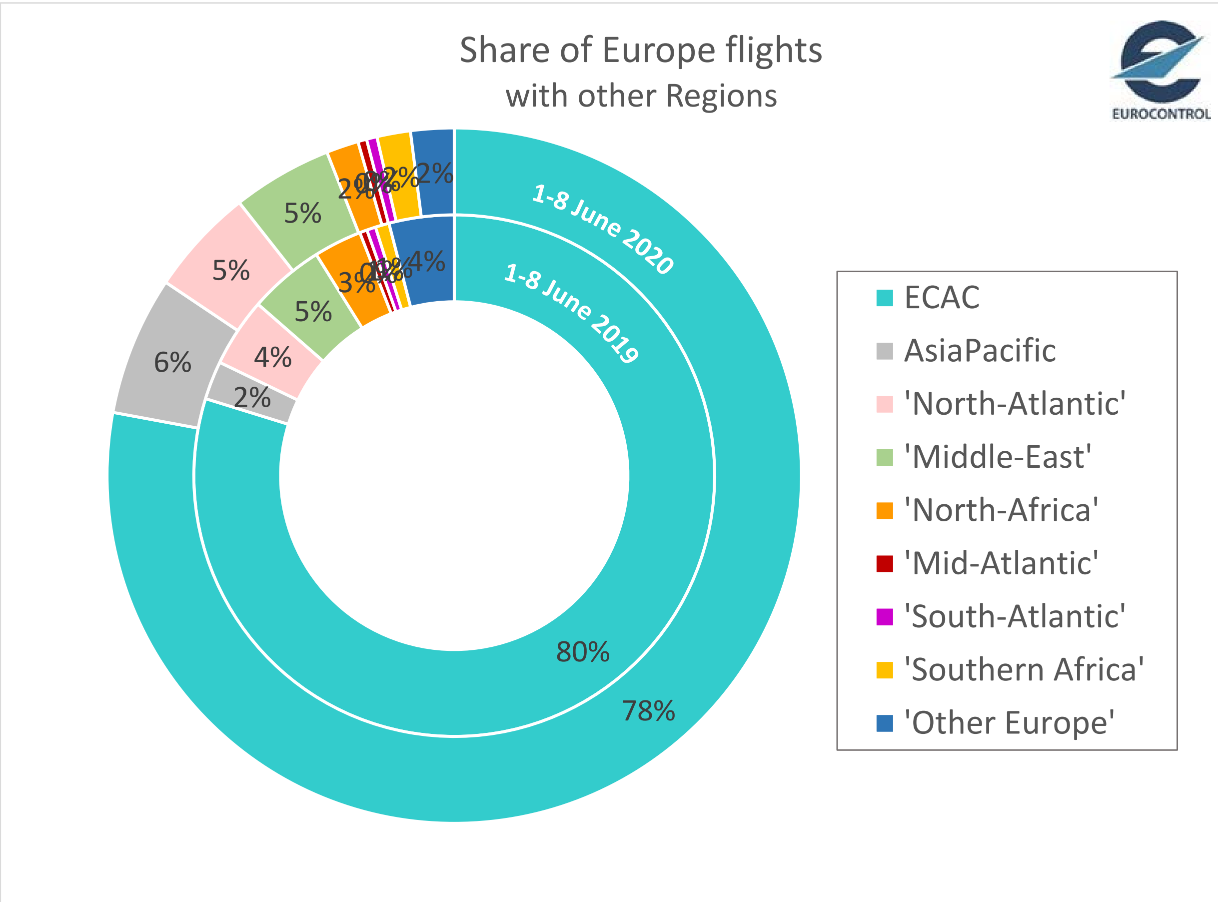


- The largest variation of average daily flights between Monday, Tuesday and Wednesday of week 23 and week 24 was for Turkish airlines with 115 additional flight on average per day followed by Pegasus (+86).



5. **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 6%, followed by North Atlantic and Middle East after having reached a minimum early April.

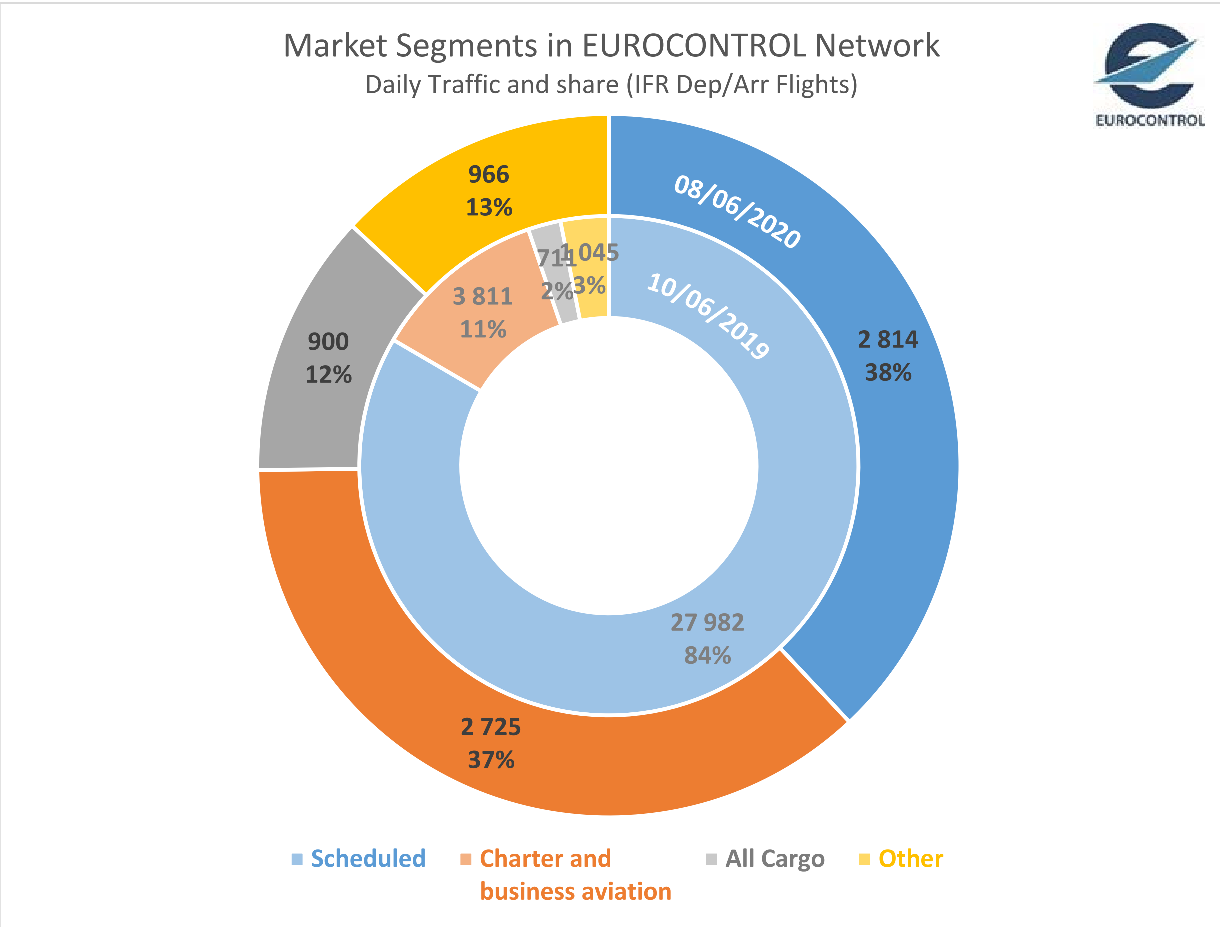


- Over the first 8 days of June, the intra-ECAC flows represented 4415 flights on average per day. Yesterday, on 8 June, the largest increase compared to the same day of the previous week was also the intra ECAC flow with 1432 additional flights.

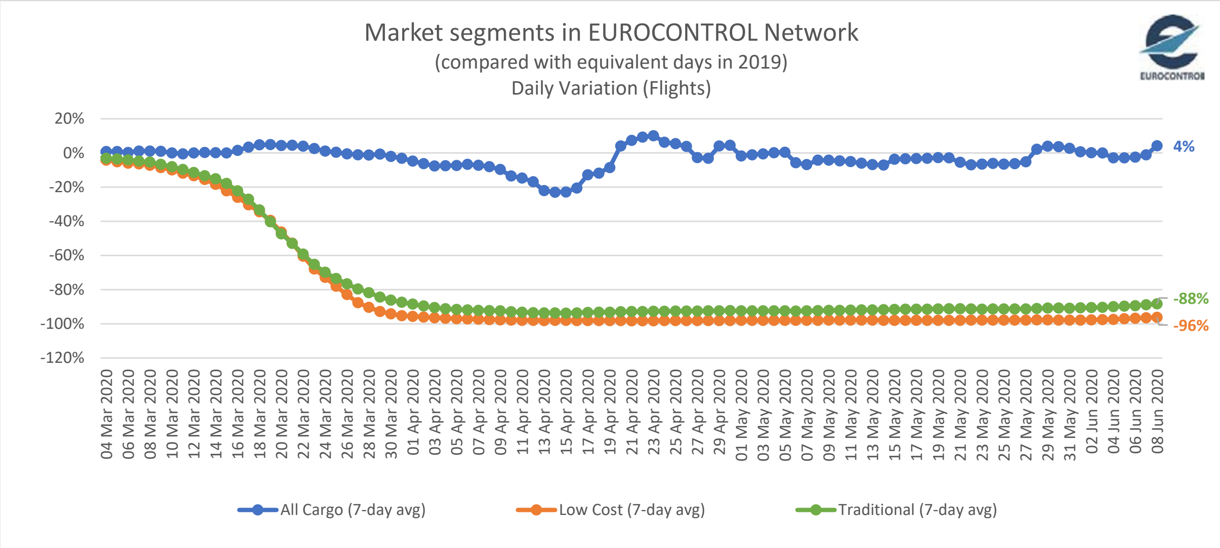
	Period 1-8 June 2020		08/06/2020 compared with 01/06/2020		
ECAC<->	Total number of flights	Avg daily number of flights	Total number of flights	Variation (Delta)	Variation (%)
ECAC	35 322	4 415	5176	1432	38,2%
AsiaPacific	2 934	367	329	-8	-2,4%
'North-Atlantic'	2 261	283	253	9	3,7%
'Middle-East'	2 108	264	243	7	3,0%
'North-Africa'	681	85	93	30	47,6%
'Mid-Atlantic'	185	23	18	2	12,5%
'South-Atlantic'	222	28	34	0	0,0%
'Southern Africa'	706	88	79	-17	-17,7%
'Other Europe'	915	114	90	-8	-8,2%

6. Market Segments (Up to 8 June 2020)

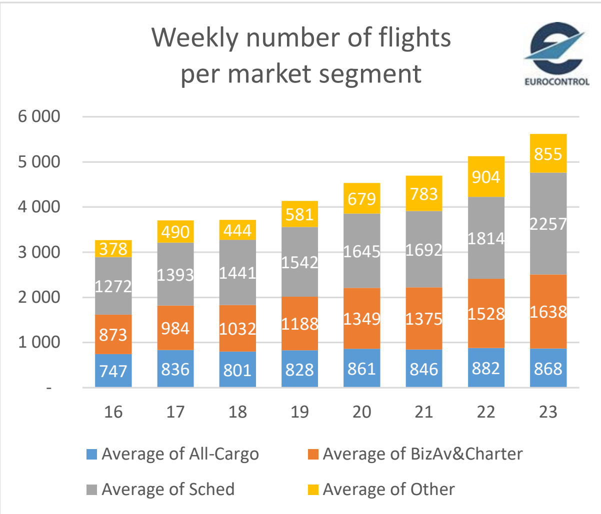
- This time last year, all-cargo flights accounted for about 2% of total Departure / Arrival flights, whereas now, it accounted for 12% on 8 June 2020. The share of scheduled traffic, which accounted for 84% reduced to 38% only.

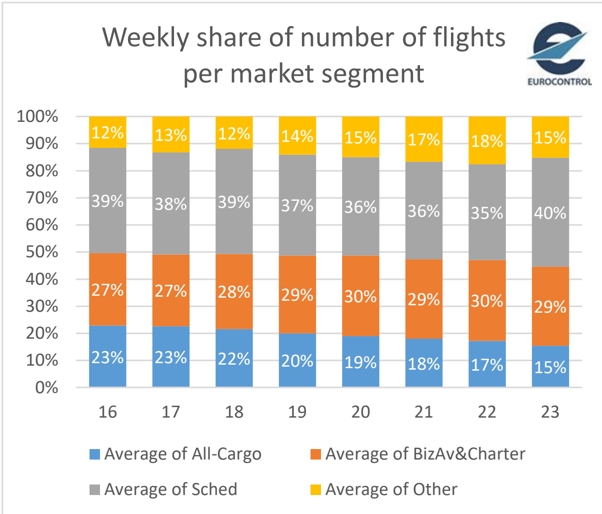


- During the crisis, all-cargo flights remained stable at the 2019 level with a variation around the Easter period (both 2019 and 2020) while scheduled and low-cost traffic reduced by 88% (respectively 96%) during the crisis.



- As shown below, the traffic per market segment is steadily 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.





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.