

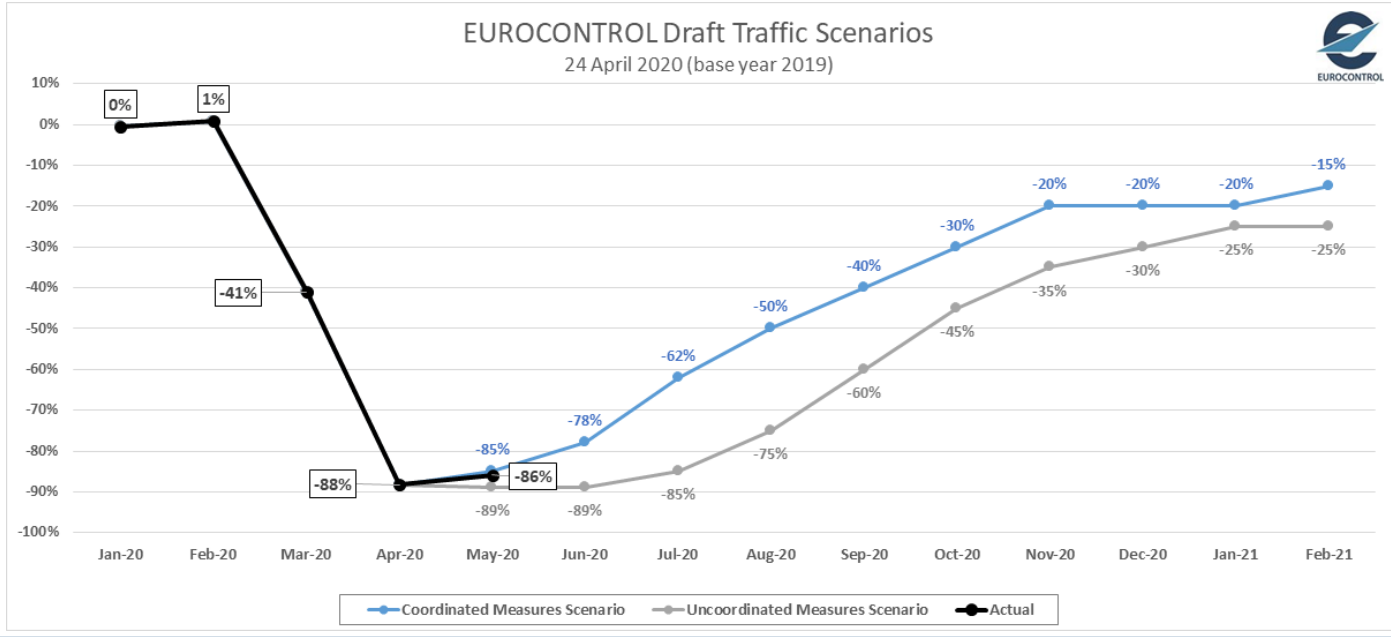


# COVID19 Impact on European Air Traffic EUROCONTROL Comprehensive Assessment

**Air Traffic situation: Monday 15 June 2020  
& Week 24 (08-14 June 2020)  
(compared with equivalent period in 2019)**

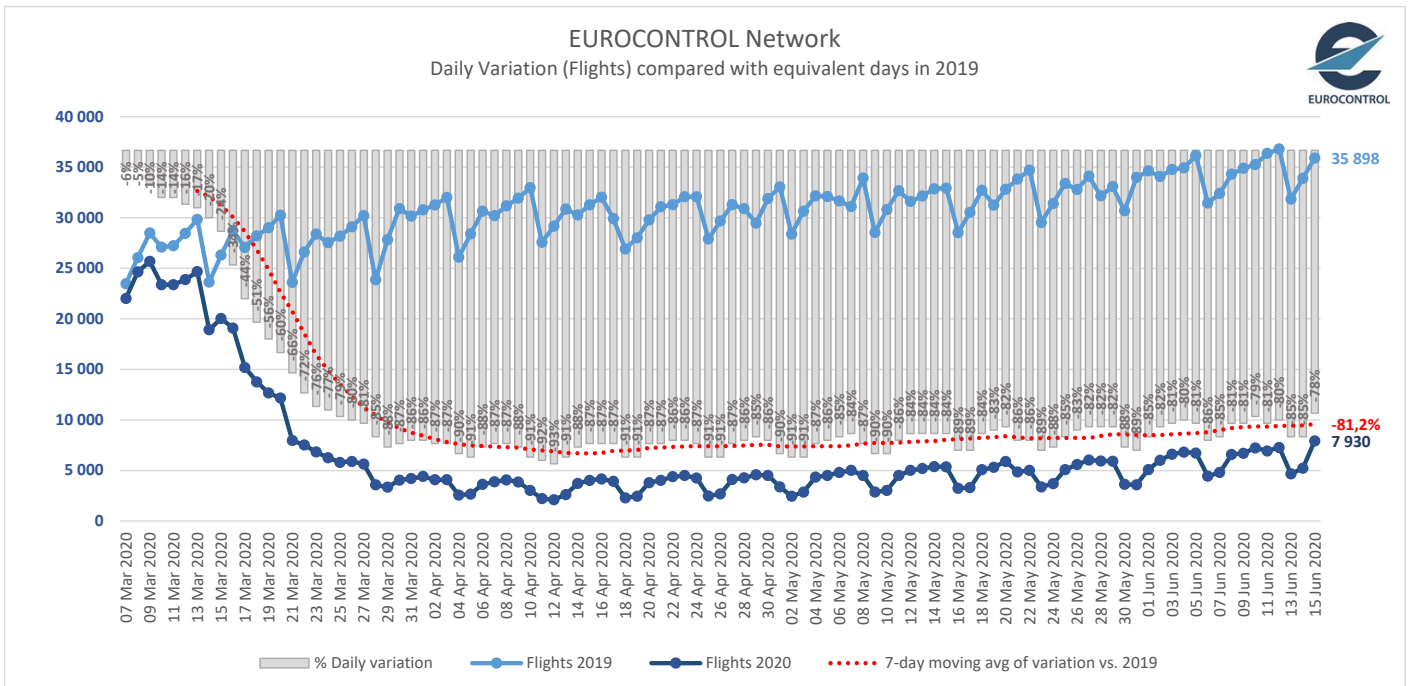
## Key Highlights

- **Monday 15 June:**
  - 7,930 flights yesterday Monday 15 June – an increase of 1,346 movements / 20.4% against Monday 8 June. This remain -77.9% against the equivalent day in 2019 but is the busiest day on the network since mid-March 2020.
  - Resumption of operations amongst others at Brussels Airlines and Austrian Airlines
  - Notable increases in movements at Lufthansa (228, +45.2%), Air France (204, +36.9%), Sun Express (66, +200%), and Netjets (100, +163.2%).
- **Traffic projections:** Latest EUROCONTROL European Network Operations (NOP) 2020 Recovery Plan (published on 12 June), confirms an upward recovery trend:
  - Network traffic is expected to reach 10,000 flights by the end of June.
  - By mid-July, we expect 13,000 flights, which is expected to rise to 15,000 as a minimum later in July (mainly intra-European). This will be around 30-35% of normal capacity.
- The traffic scenarios we projected on 24 April remain valid for a coordinated opening and EUROCONTROL is becoming more optimistic.

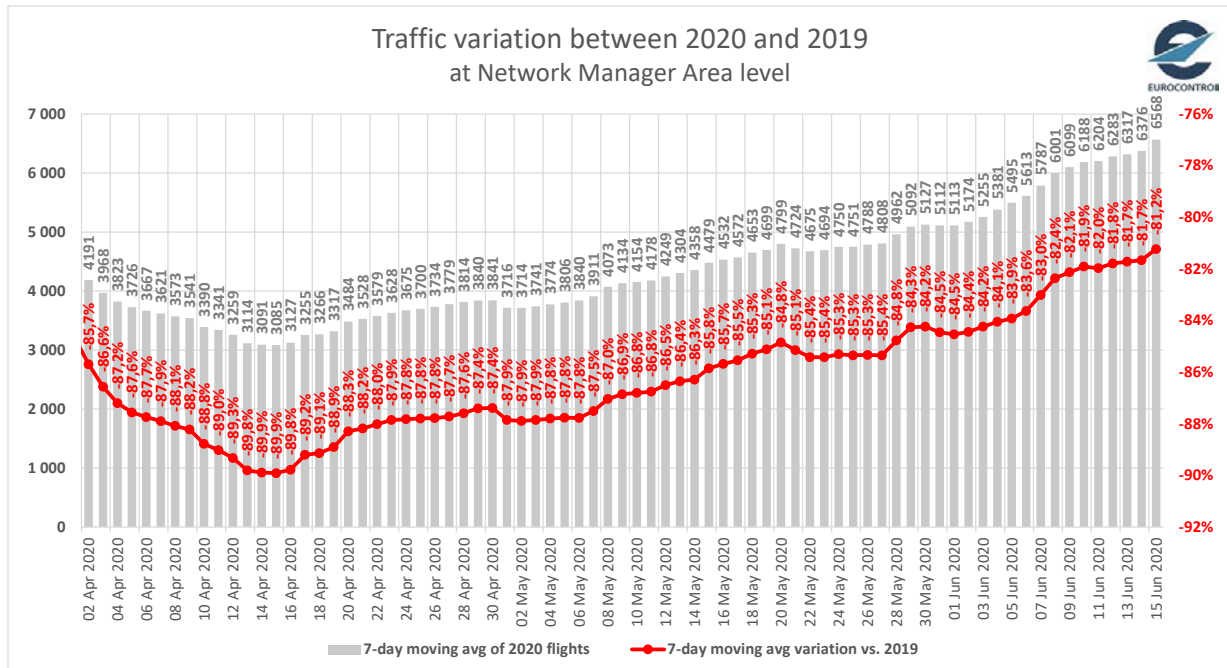


**1. Summary points on the network situation:**

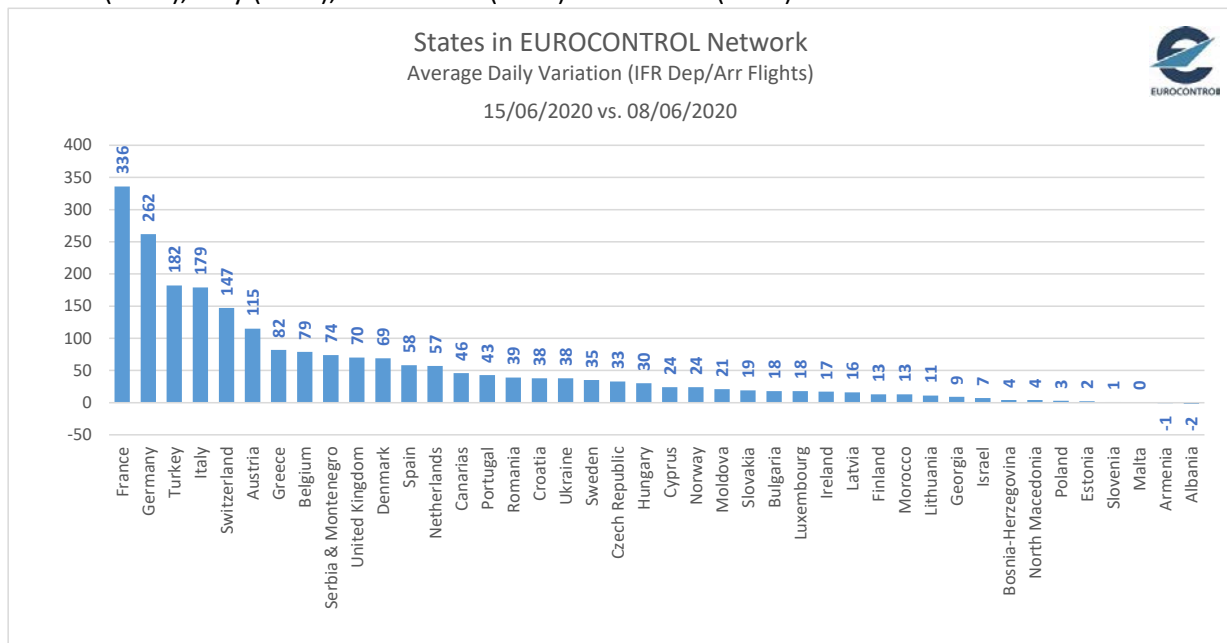
- **NM Network flights Mon 15 June: 7,930 flights -77.9% (27,968 fewer flights)**
  - Increase of +1346 movements on the previous Monday (8 June) (i.e. +20.4%).
  - More than 7,900 flights for the first time since Saturday 21 March.
  - Turkish Airlines was the busiest airline with 380 movements, followed by Widerøe (229), Lufthansa (228), Air France (204), DHL Express (181), SAS (181), Wizz Air (156), KLM (145) and Bristow Norway (131).
  - Paris/CDG was the busiest airport with 352 movements, followed by Frankfurt (322), Amsterdam (299), London/Heathrow (263), Athens (256), Istanbul/Grand (239) and Oslo (218).
  
- **Week #24 (08-14 June): 6,376 flights (daily avg) -81.7% (198,744 fewer flights)**
  - Increase of +589 per day on the previous week (01-07 June) (i.e. +10.2%).
  - Saturday was the quietest day of the week with 4,679 flights.
  - The 'deficit' since 01 March 2020 totals 2,350,009 flights.
  - Turkish Airlines (334) was the busiest operator with an average of 334 movements per day, followed by Widerøe (200), DHL Express (182), Lufthansa (164) and Air France (146).
  - Averaged across the week, CDG (300) was the busiest airport with an average of 300 movements per day followed by Frankfurt (293), Schiphol (268), Heathrow (247), and New Istanbul (224).



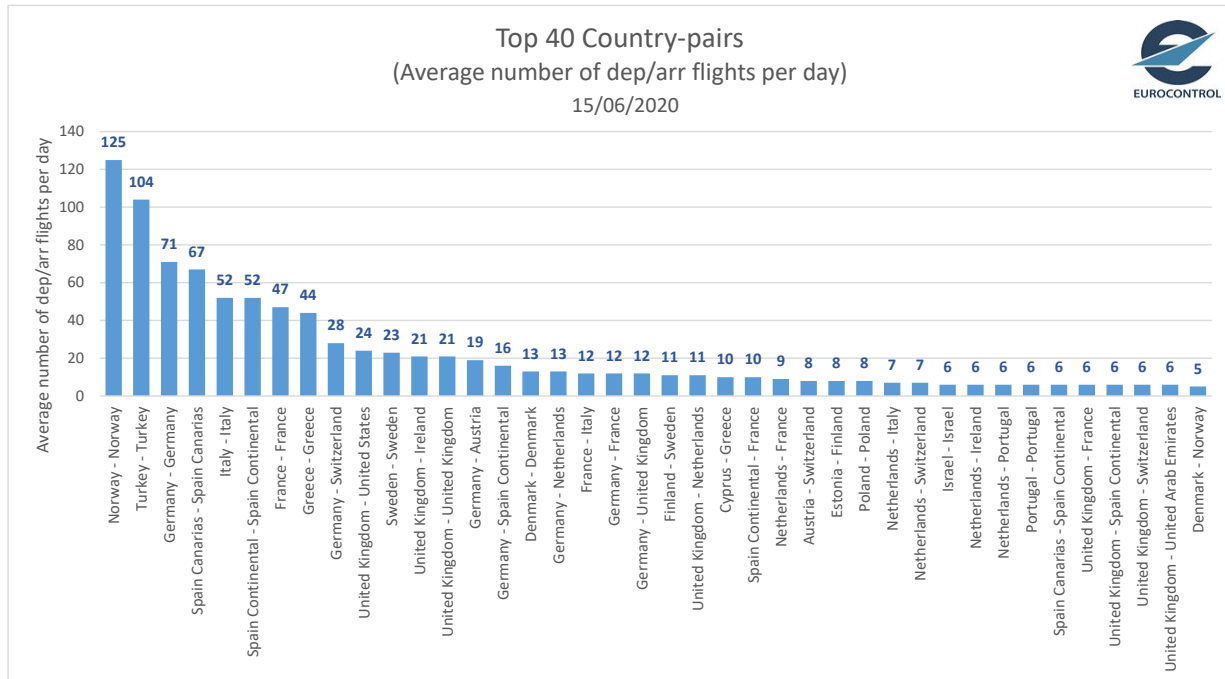
- When zooming in, a constant but slight recovery is clearly visible at network level since mid-April both in terms of variation against 2019 and in absolute number of flights (using 7-day moving average for both indicators).



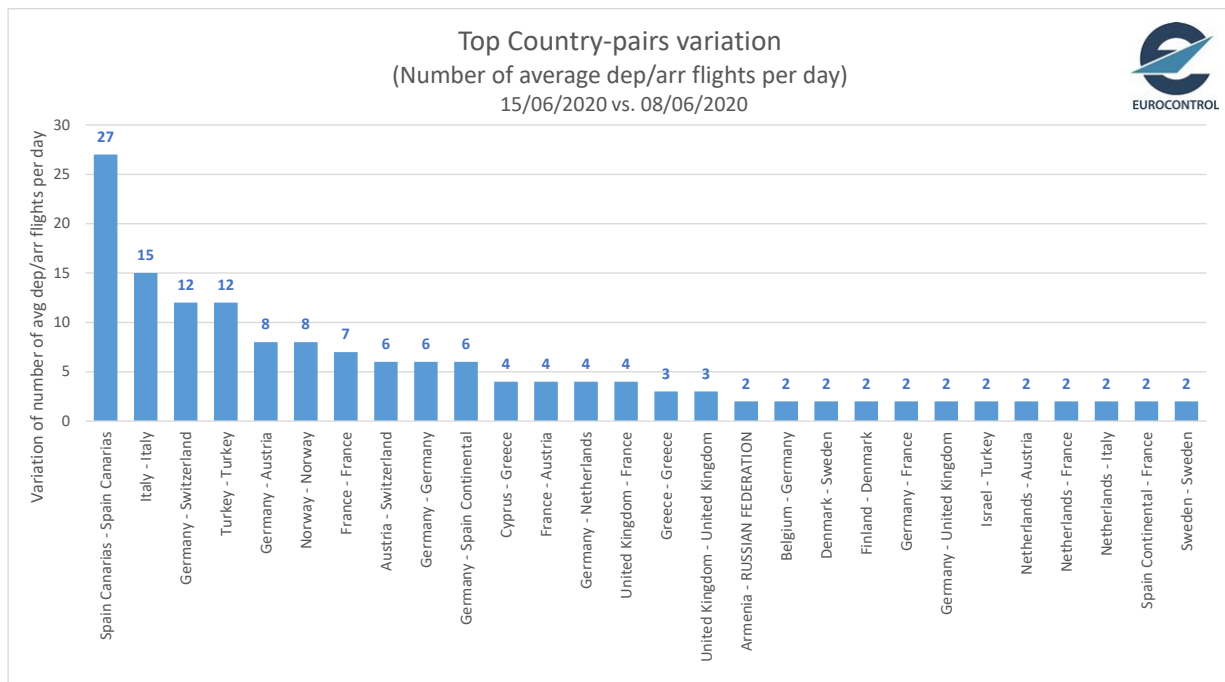
- The largest variation of average daily flights between Monday 8 and Monday 15 June was for France with 336 additional flights on average per day, followed by Germany (+262), Turkey (+182), Italy (+179), Switzerland (+147) and Austria (+115).



- When considering departing and arriving flights per country-pairs on Monday 15 June, the domestic flow within Norway was clearly the highest with 125 dep/arr flights a day on average, followed by Domestic flights within Turkey, Germany, Spain, Italy, France and Greece.



- Between Monday 8 and Monday 15 June, the country-pairs which increased the most were the domestic flights within Spain (+27 dep/arr flights per day on average), followed by the flows within Italy (+15), between Germany and Switzerland (+12) and within Turkey (+12).



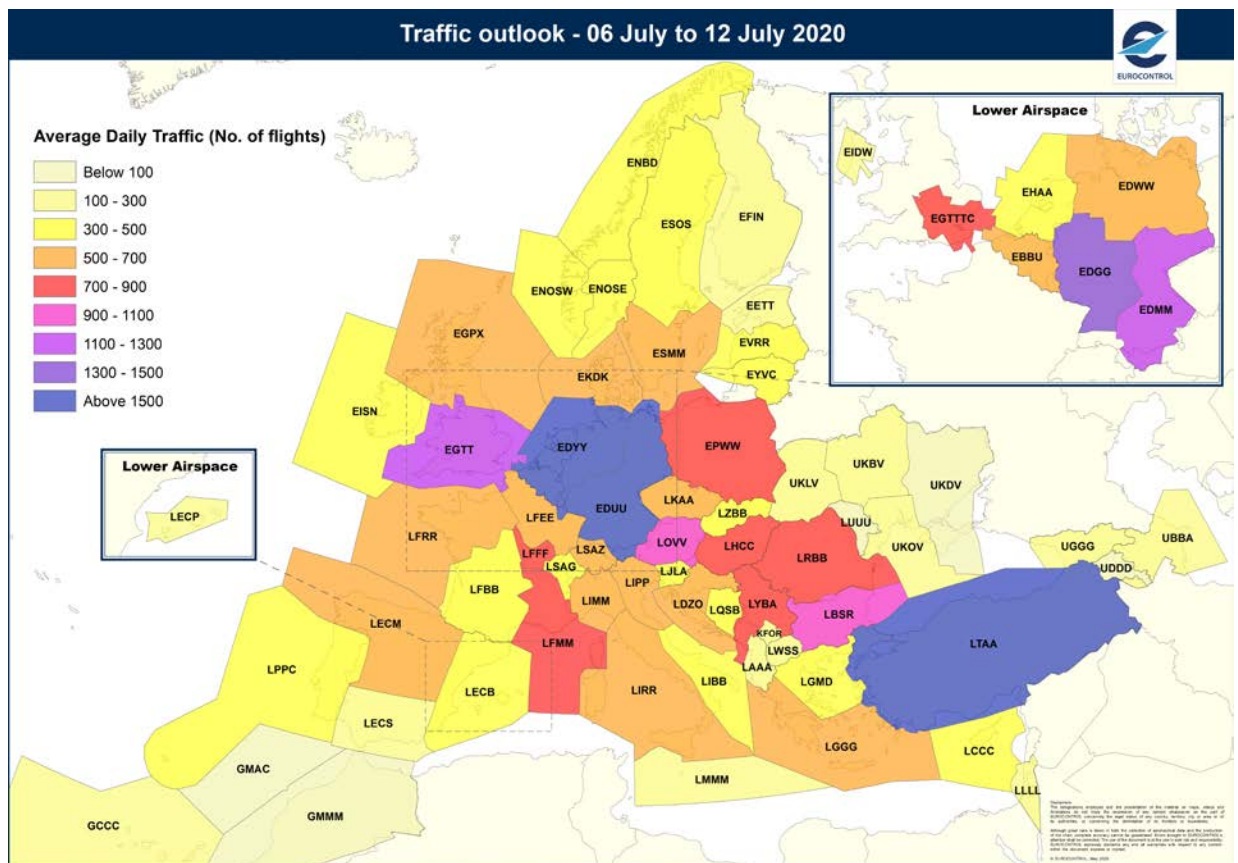
## 2. Return to Operations

- **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.]

- Network traffic outlook –the network traffic is expected to reach 10.000 flights by the end of June, getting gradually to up to 13.000 flights on some days in the first half of July 2020.
- This would represent in average for the week of 6 July 2020 approximately 30% of the traffic during the similar period in 2019.



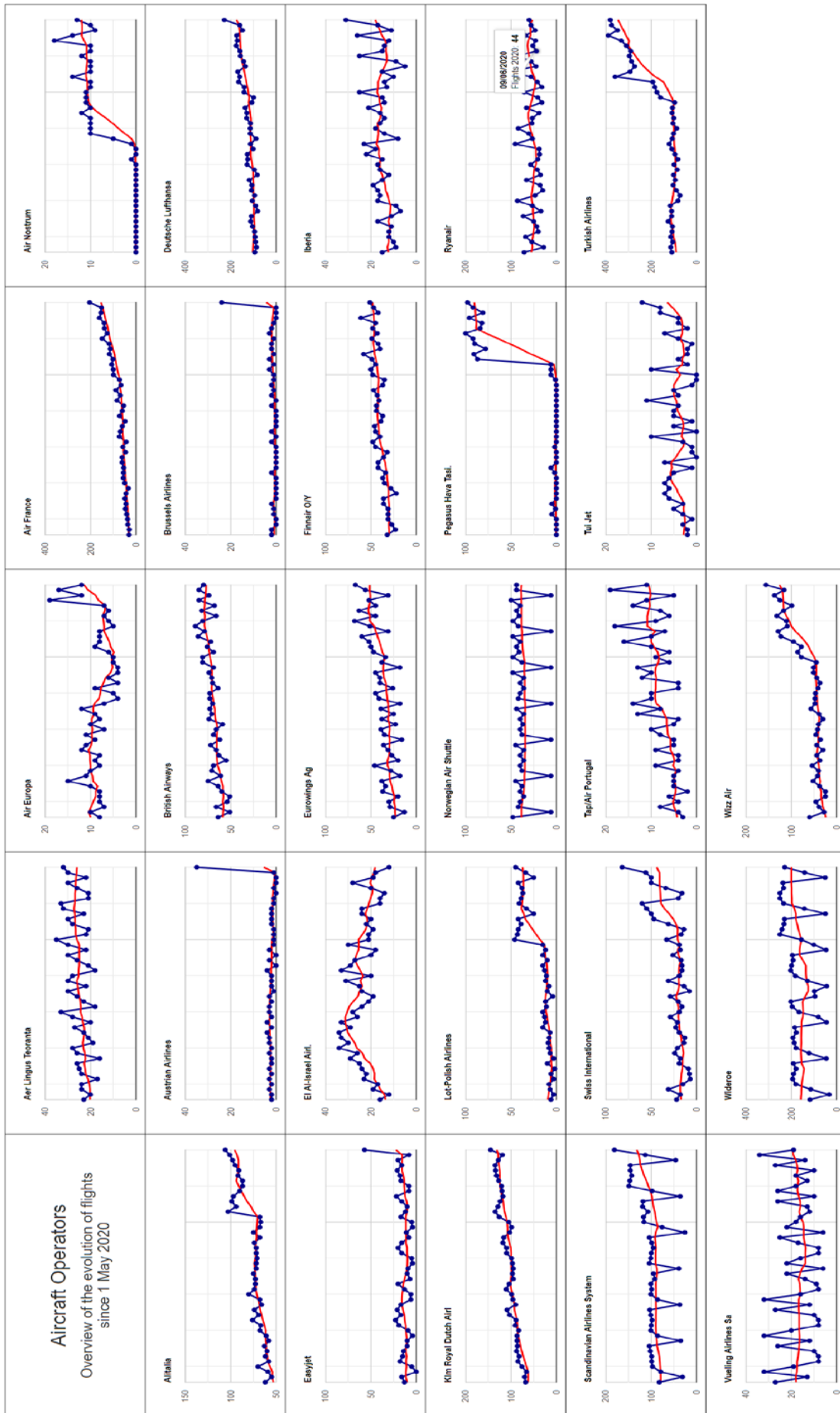
### Average Daily Traffic

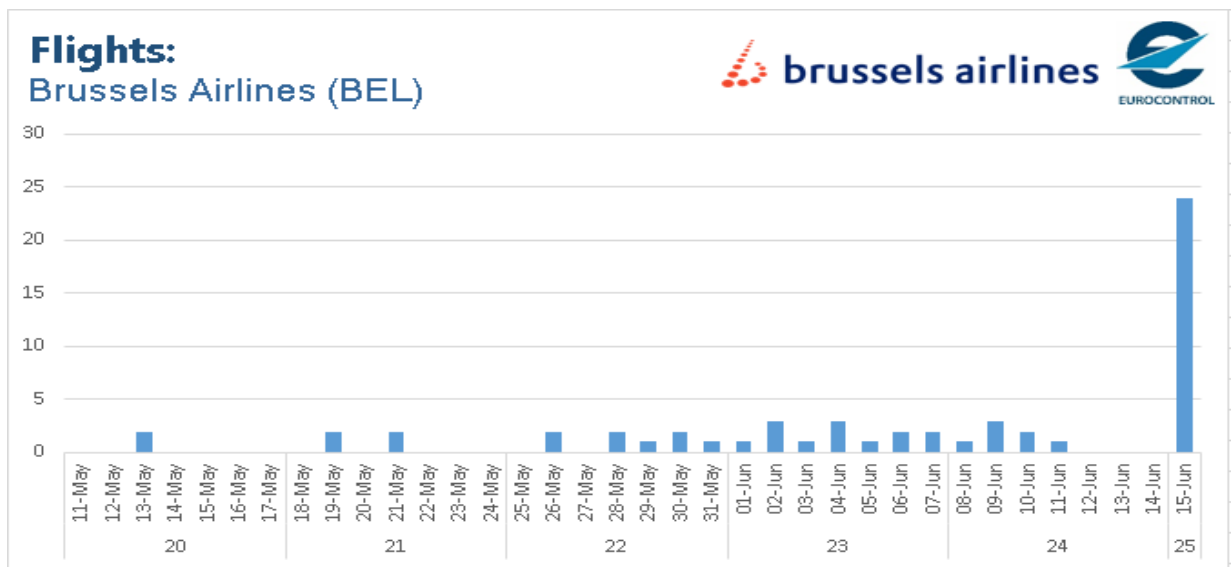
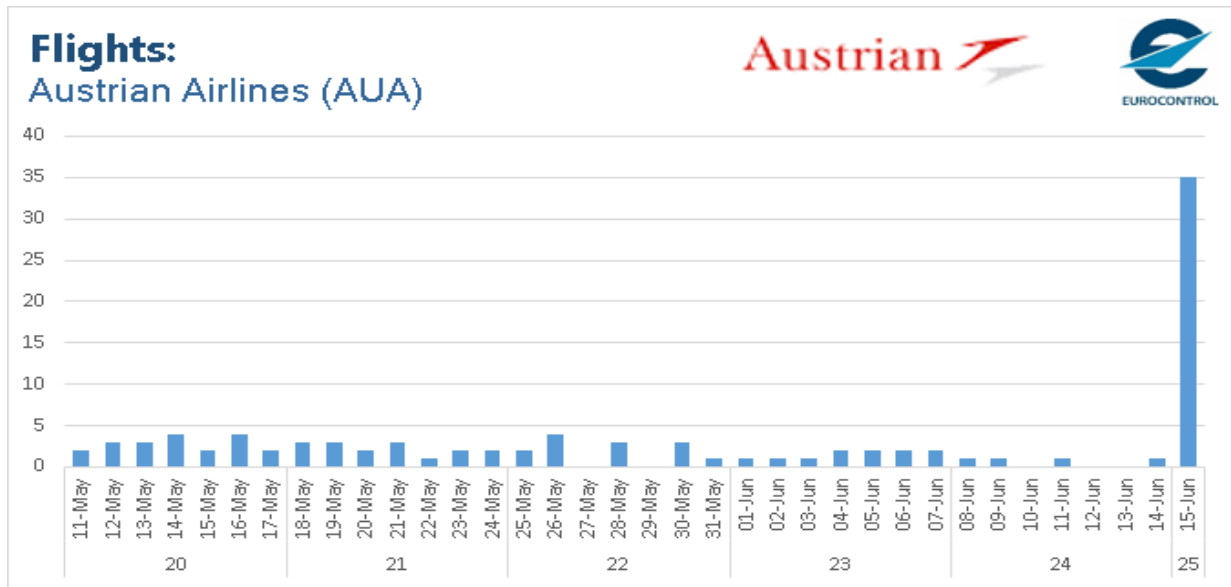
#### EUROCONTROL European Network Operations (NOP) 2020 Recovery Plan, 12 June 2020

- **European Airline Examples**

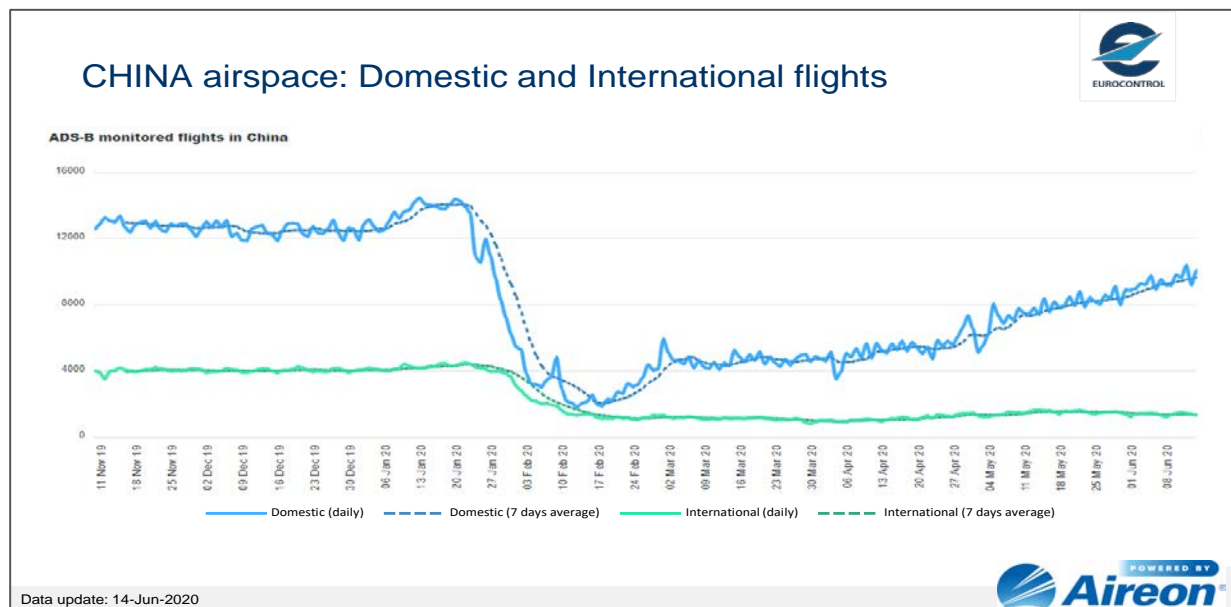
- Over the last few weeks, restart is clearly visible for some airlines:
- Since the beginning of June for Turkish airlines, Wizz Air, Alitalia, Pegasus and LOT airlines.
- On Monday 15 June for Brussels airlines, Austrian Airlines and easyJet.
- Constantly since 1 May for Air France, Lufthansa, KLM.

- The chart below presents an evolution of the largest European aircraft operators since 1 May 2020: For more, see: <https://www.eurocontrol.int/Economics/DailyTrafficRestart-AOs.html>





- **Return to Operations - Focus on China**
  - China domestic traffic now running at approximately 69% of normal traffic, with 9,642 flights – 7-day rolling average to 14 June 2020 (source: EUROCONTROL NM / Aireon)

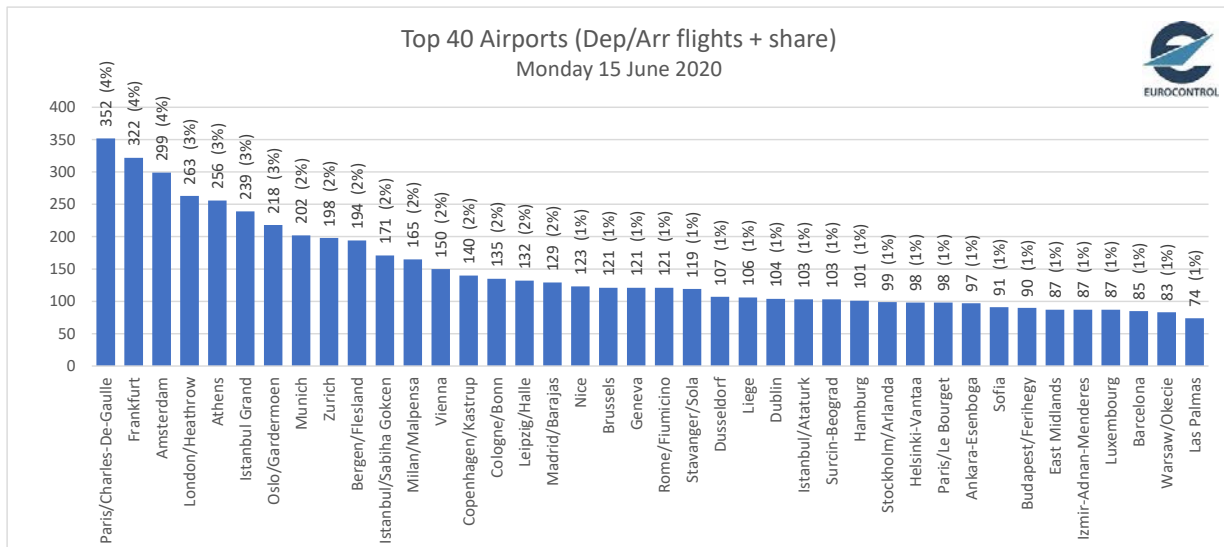


Data update: 14-Jun-2020

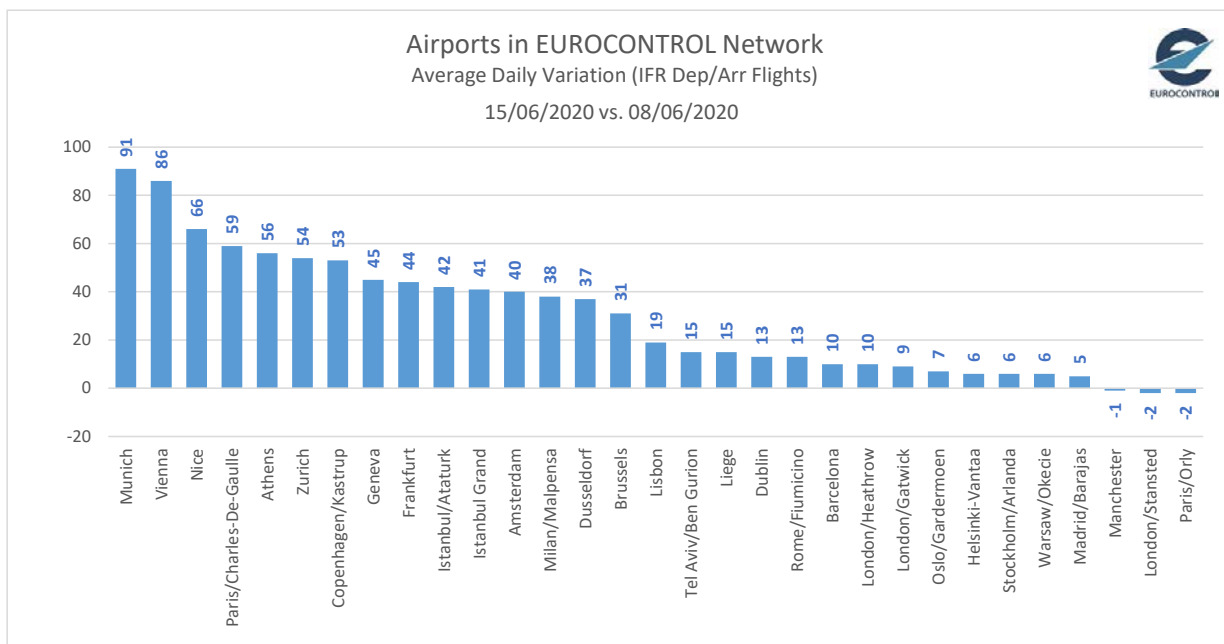


### 3. Airports:

- On Monday 15 June, Paris/CDG was the busiest airport with 352 movements, followed by Frankfurt (322), Amsterdam (299), London/Heathrow (263), Athens (256), Istanbul/Grand (239) and Oslo (218).



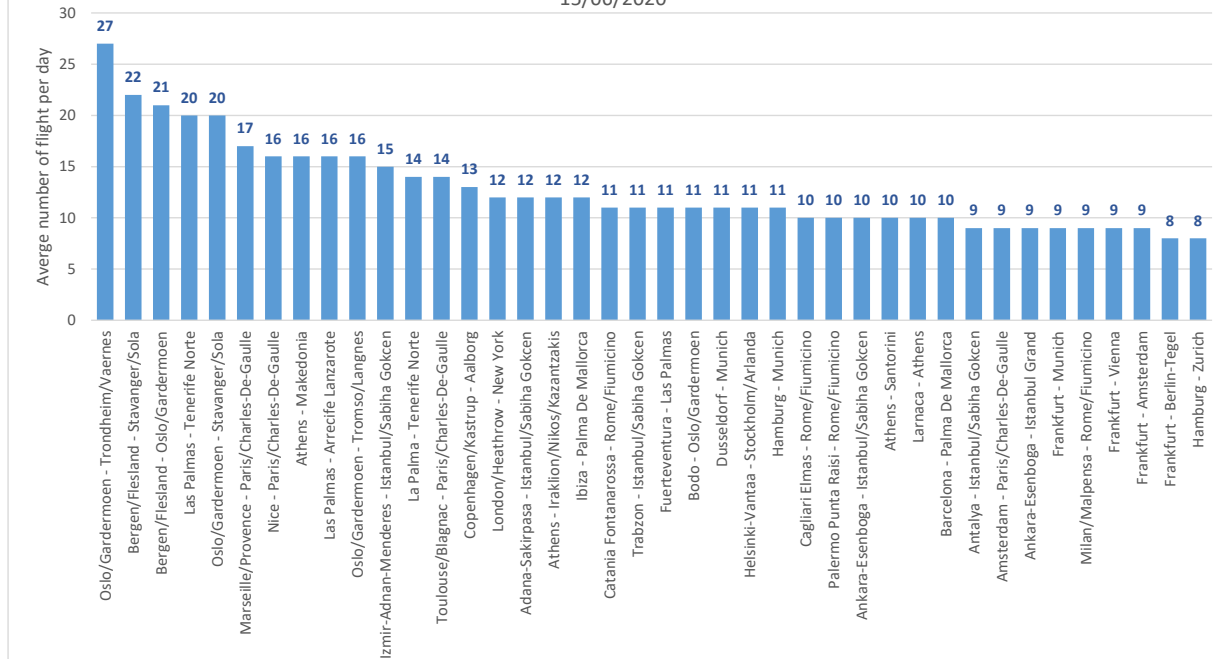
- The largest variation of average daily flights between Monday 8 and Monday 15 June was for Munich with 91 additional flights on average per day, followed by Vienna (+86), Nice (+66), Paris CDG (+59) and Athens (+56).



- On Monday 15 June, the airport-pairs which accounted the most were flows between Norwegian airports with more than 20 dep/arr flights a day on average (reaching 27 between Oslo and Trondheim), Las Palmas/Tenerife was 4<sup>th</sup> with 20, Marseille/Paris CDG was 6<sup>th</sup> with 17. All other top 40 airport pairs are around 8-16 dep/arr flights a day on average.

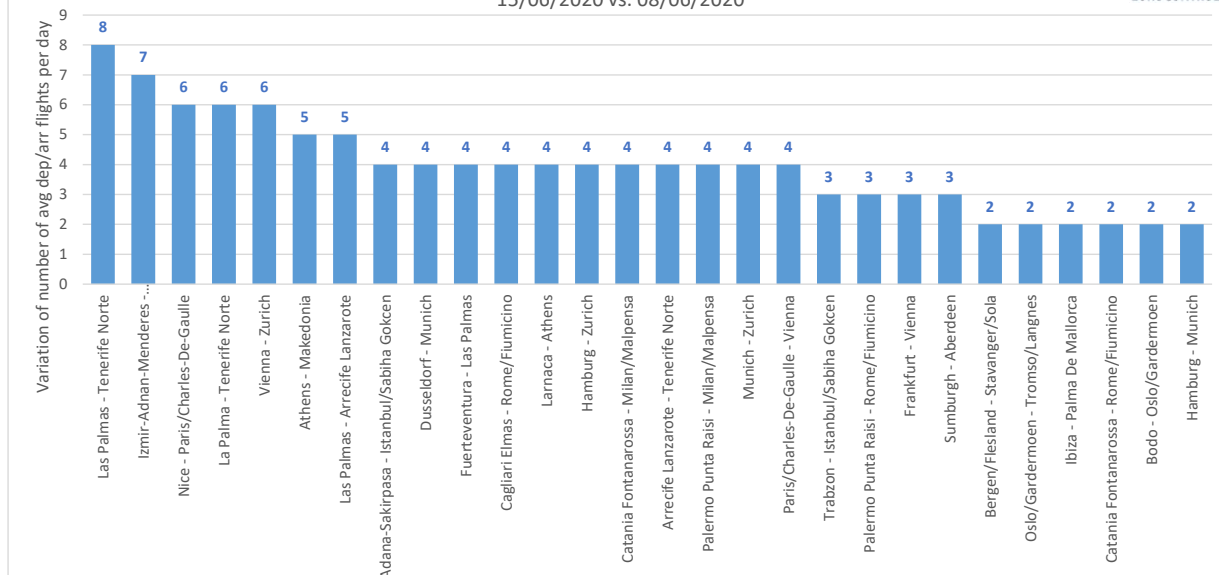


### Top 40 Airport-pairs (Average number of dep/arr flights per day) 15/06/2020



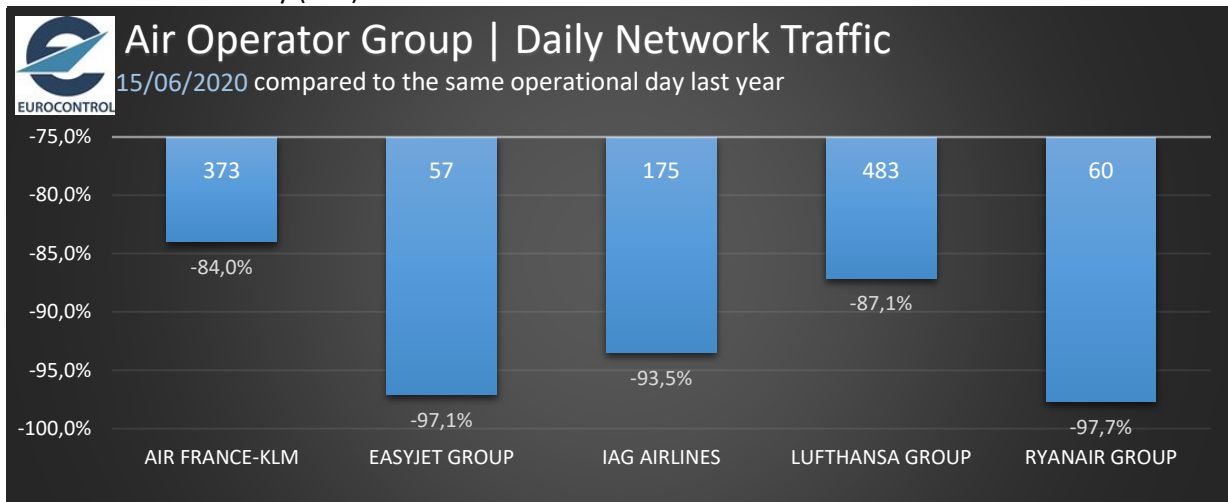
- Between Monday 8 and 15 June, the airport-pairs which increased the most were the flows Las Palmas-Tenerife (+8 dep/arr flights per day on average), followed by Izmir-Istanbul/Sabiha (+7), Nice-Paris/CDG (+6), La Palma-Tenerife (+6) and Vienna-Zurich(+6).

### Top Airport-pairs variation (Number of average dep/arr flights per day) 15/06/2020 vs. 08/06/2020

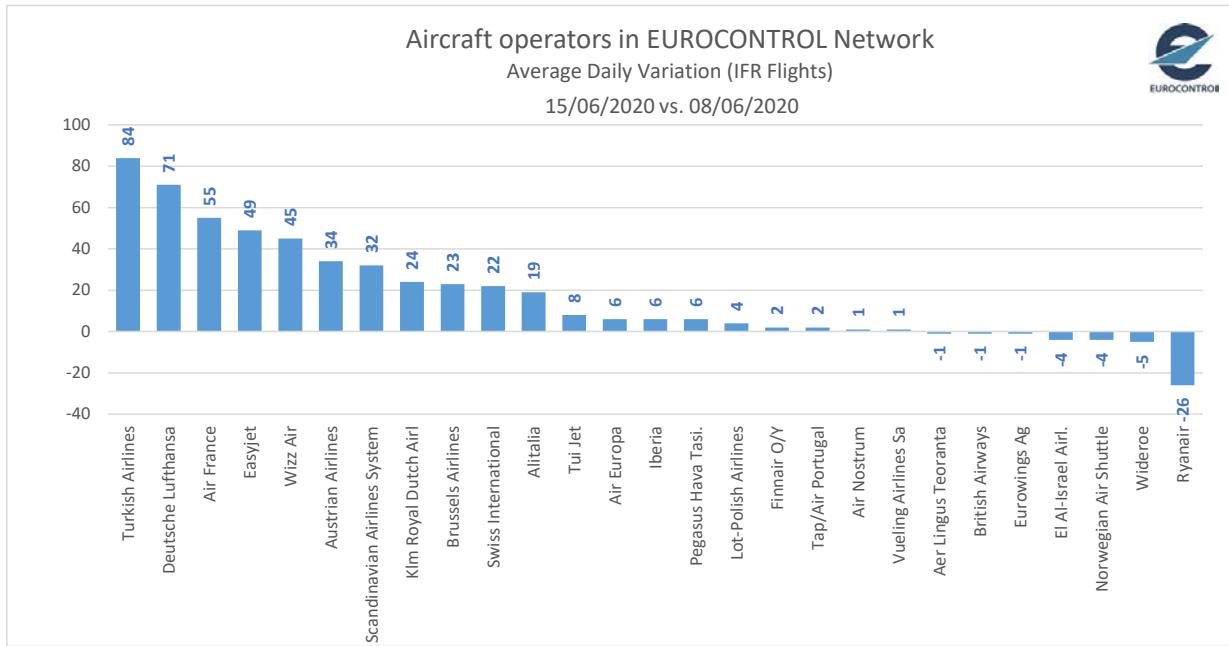


#### 4. Airlines

- For the largest Air Operator Groups, the reductions on **Monday 15 June** were: easyJet -97.1%, Ryanair Group -97.7%, IAG Airlines -93.5%, Lufthansa Group -87.1% and Air-France-KLM -84.0%.
- On Monday 15 June, compared to 2019, TUI Jet was -98%, Ryanair -98%, easyJet -97%, Austrian -92%, Iberia -92%, British Airways -92%, Lufthansa -86%, Air France -83%, KLM -81%, Turkish Airlines -74% and Widerøe -45%.
- Turkish Airlines was the busiest airline with 380 movements, followed by Widerøe (229), Lufthansa (228), Air France (204), DHL Express (181), SAS (181), Wizz Air (156), KLM (145) and Bristow Norway (131).

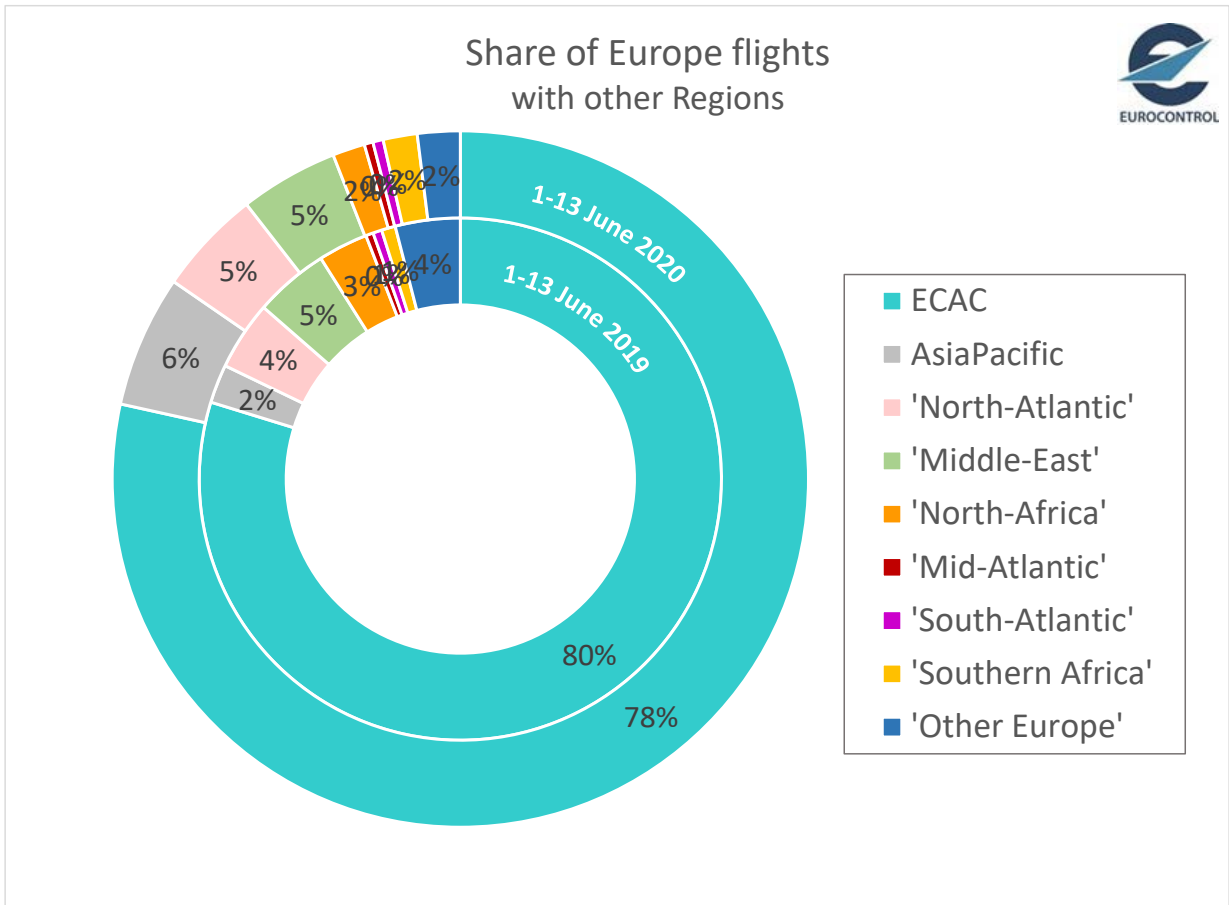


- The largest variation of average daily flights between Monday 8 and Monday 15 June was for Turkish airlines with 84 additional flights on average per day followed by Lufthansa (+71), Air France (+55) easyJet (+49) and Wizz Air (+45).



### 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.

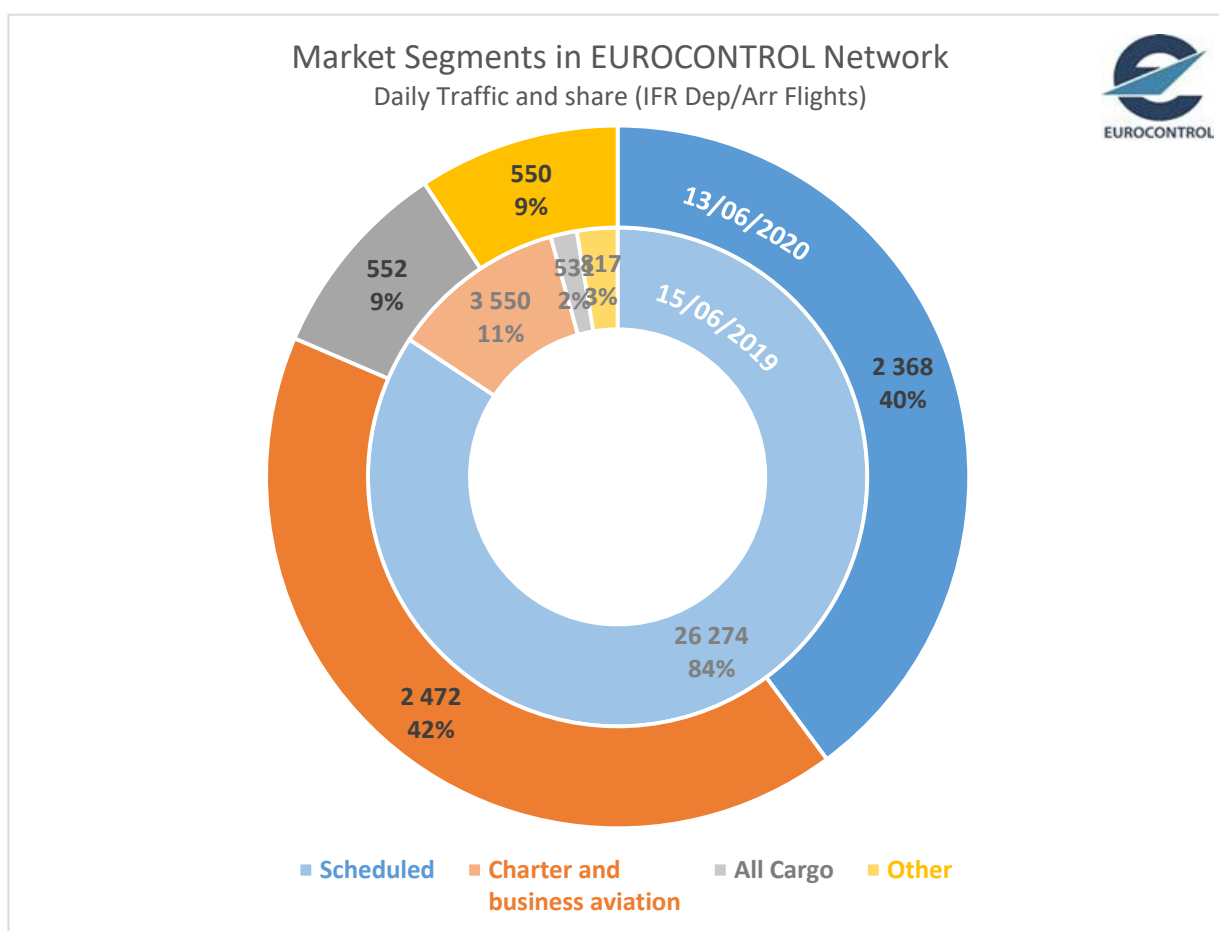


- Over the first 13 days of June, the intra-ECAC flows represented 4649 flights on average per day.

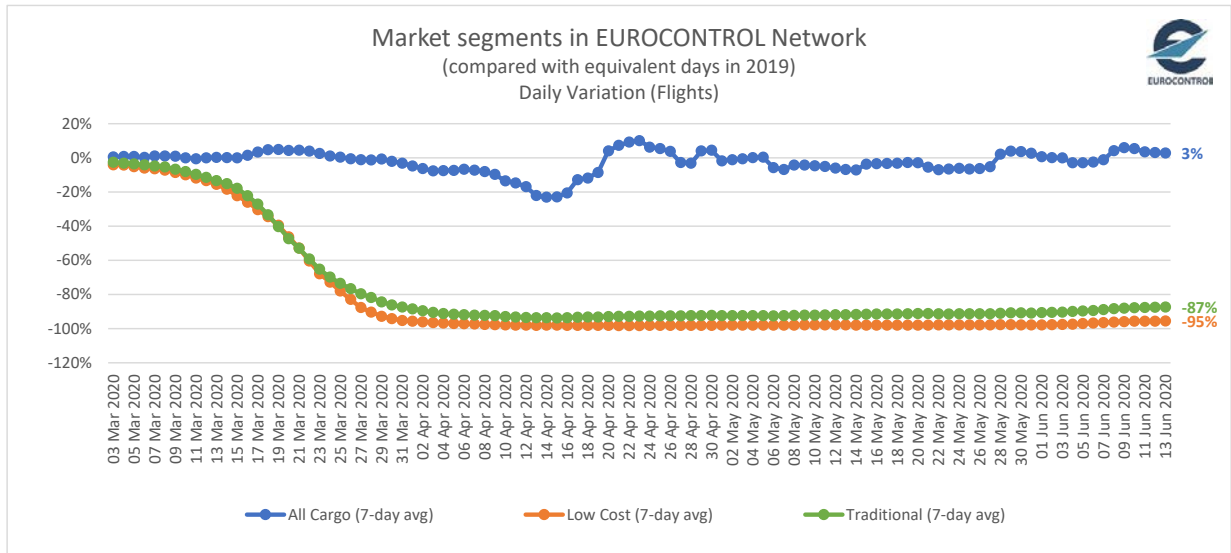
ECAC<->	Period 1-13 June 2020	
	Total number of flights	Avg daily number of flights
ECAC	60 432	4 649
AsiaPacific	4 727	364
'North-Atlantic'	3 753	289
'Middle-East'	3 525	271
'North-Africa'	1 158	89
'Mid-Atlantic'	312	24
'South-Atlantic'	370	28
'Southern Africa'	1 218	94
'Other Europe'	1 526	117

## 6. Market Segments (Up to 13 June 2020)

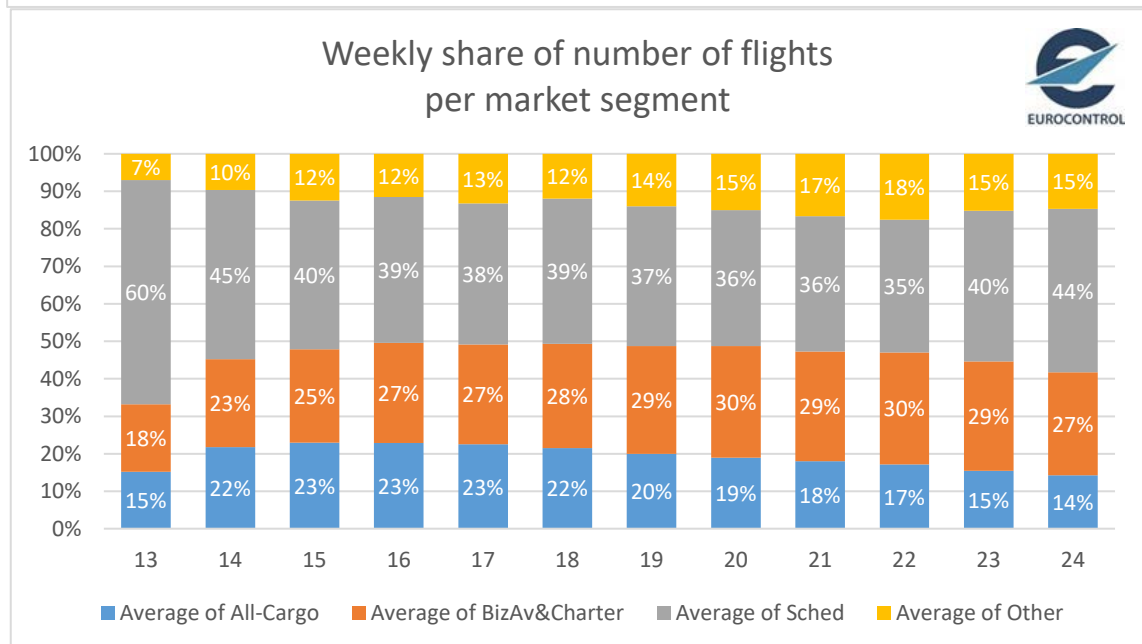
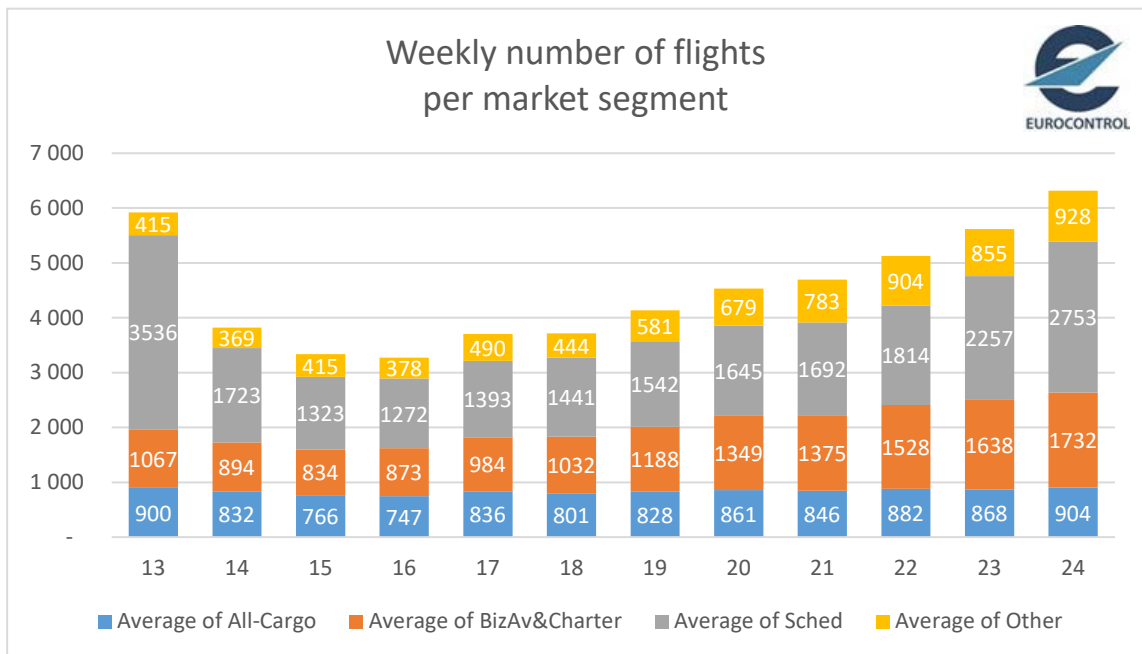
- This time last year, all-cargo flights accounted for about 2% of total Departure / Arrival flights, whereas now, it accounted for 9% on 13 June 2020. The share of scheduled traffic, which accounted for 84% reduced to 40%.



- 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 87% (respectively 95%) 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.



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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.

