EUROCONTROL

COVID19 Impact on European Air Traffic
EUROCONTROL Comprehensive Assessment

Air Traffic situation: Tuesday 23 June 2020 & Week 25 (15-21 June 2020) (compared with equivalent period in 2019)

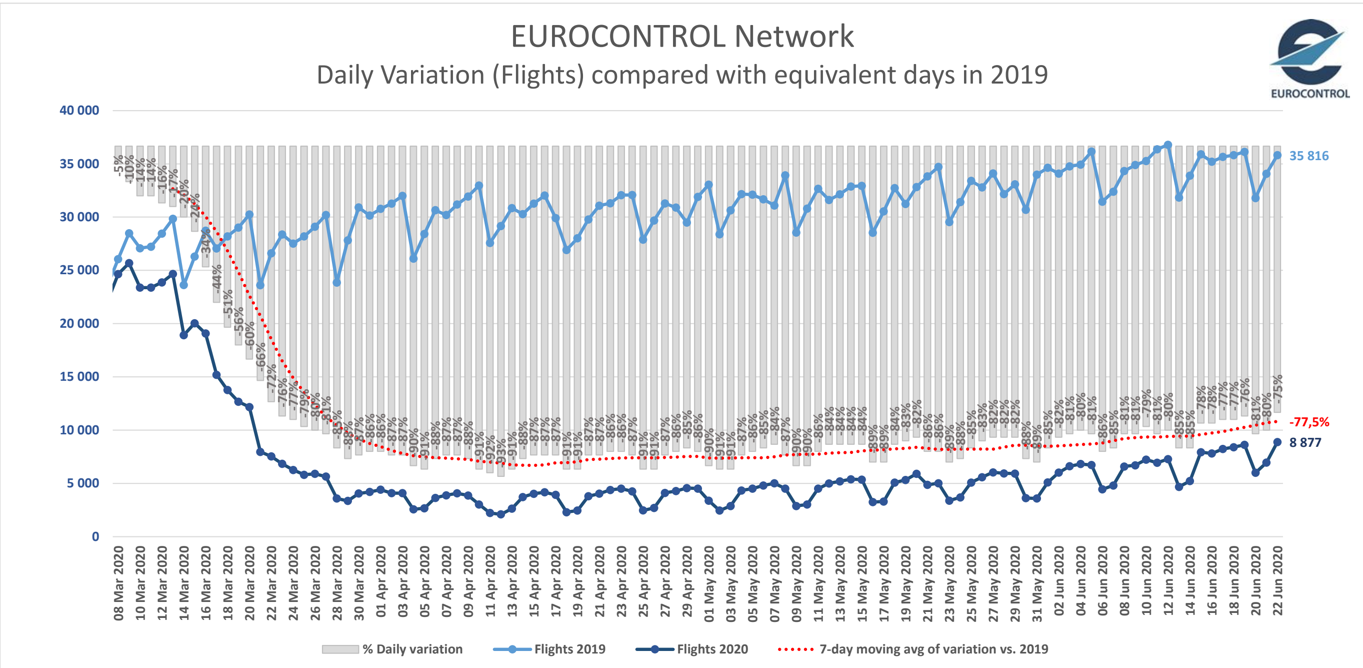
Key Highlights

- **Tuesday, 23 June 2020**
  - **8,769 flights on Tue 23 June, an increase of +959 movements / 12% increase compared to the previous Tuesday, 16 June. This remain -75.1% against the equivalent day in 2019 (26,501 fewer flights)**
  - **Turkish Airlines was the busiest operator with 401 movements, followed by Wizz (270), Widerøe (258), Lufthansa (250), and DHL Express (250). Ryanair (218) operated 218 flights, having recommenced operations in recent days.**
  - **Paris CDG was the busiest airport with 425 movements, followed by Schiphol (313), Frankfurt (303), New Istanbul (265) and Gardermoen (236). Heathrow (227) handled 227 movements.**
- **Week #25 (15-21 June):**
  - **7,706 flights (daily avg) -77.9% (190,615 fewer flights) – an increase of +1,330 per day on the previous week (08-14 June) (i.e. +20.9%).**
  - **Mainland Spain + Balearics: Signs of recovery in International movements but more notably in their Domestic market.**
- **Month of June: Over the first 22 days of June, traffic was increasing and reaching -80.5% below 2019 level.**
- **Traffic projections: Latest EUROCONTROL European Network Operations (NOP) 2020 Recovery Plan (published on 19 June), confirms an upward recovery trend:**
  - **Network traffic is expected to reach 13,000 flights by beginning July.**
  - **By end-July/beginning of August, we expect 15,500 flights (mainly intra-European). This will be around 40% of normal capacity.**
- **China**
  - **China domestic traffic now running at approximately 75% of average domestic compared to 2019, with 9,459 flights (7-day rolling average to 18 June 2020)**
  - **However, both Beijing Airports (Beijing Capital and Daxing) have seen a sharp decrease of their operations since 15 June 2020.**

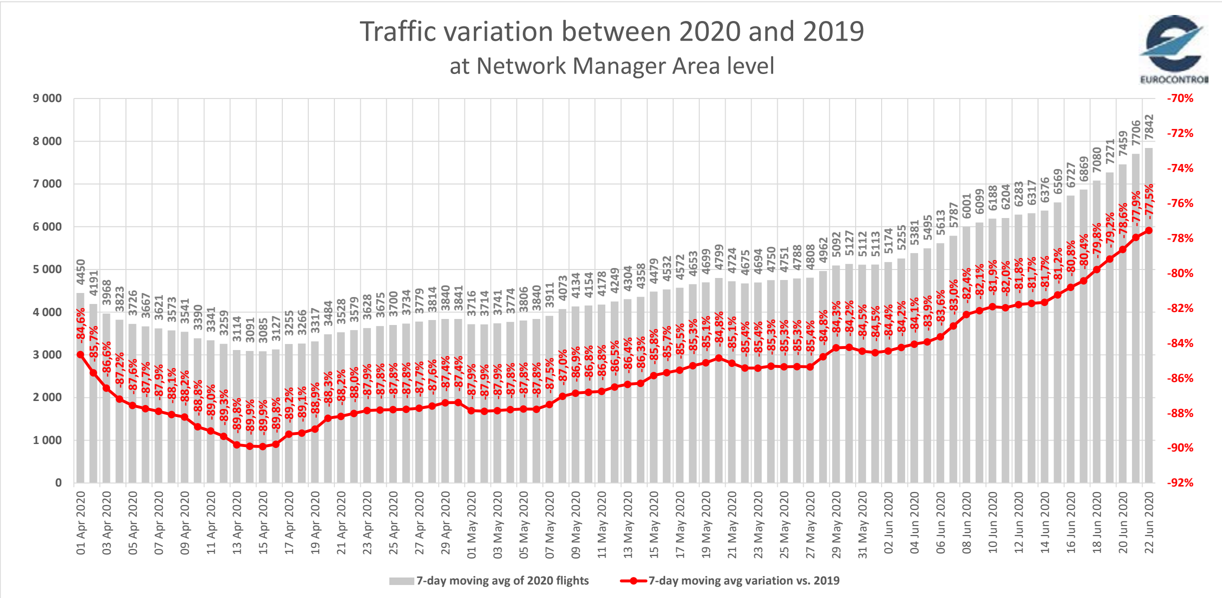
1. **Summary points on the network situation:**

- **NM Network flights Mon 22 June: 8,877 flights -75.2%** (**26,939** fewer flights)
    - Increase of +946 movements on the previous Monday (15 June) (i.e. +12%).
    - More than 8,800 flights for the first time since Saturday 21 March.
    - Turkish Airlines was the busiest airline with 410 movements, followed by Ryanair (252), Lufthansa (251), Widerøe (240), Wizz Air (229), Air France (220), SAS (203) and DHL Express (185).
    - Paris/CDG was the busiest airport with 388 movements, followed by Amsterdam (340), Frankfurt (334), Istanbul/Grand (277), Athens (270), London/Heathrow (266), Munich (224) and Oslo (222).

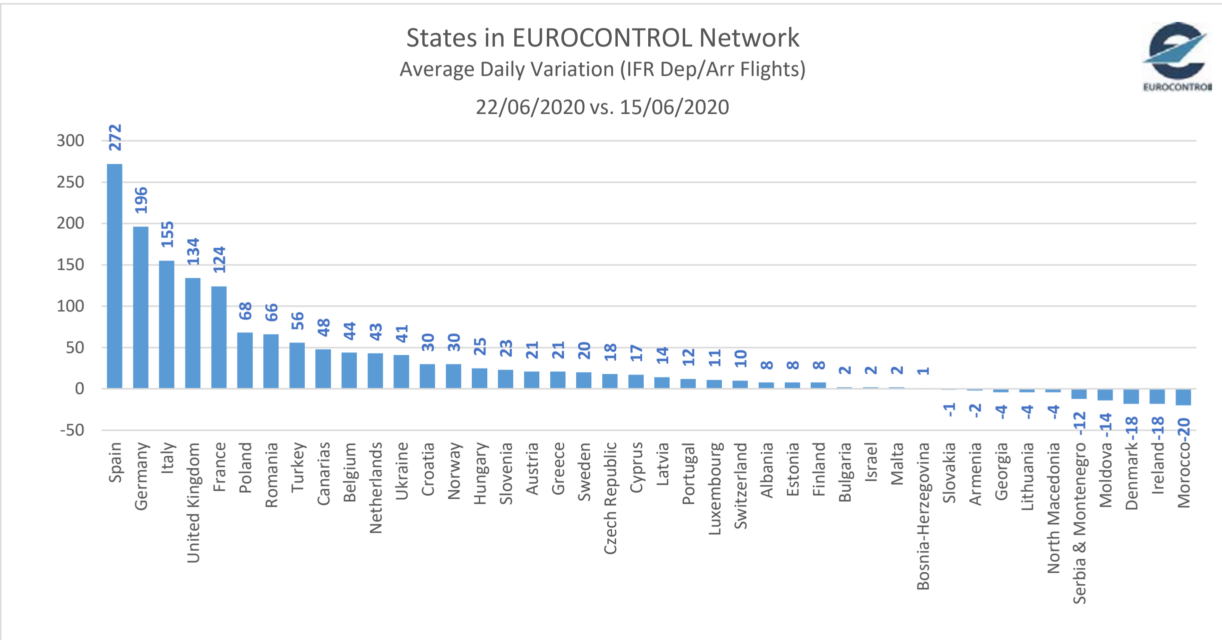
- **Week #25 (15-21 June): 7,706 flights (daily avg) -77.9%** (**190,615** fewer flights)
    - Increase of +1,330 per day on the previous week (08-14 June) (i.e. +20.9%).
    - Saturday was the quietest day of the week with 5,999 flights.
    - The 'deficit' since 01 March 2020 totals 2,596,455 flights.
    - Turkish Airlines (402) was the busiest operator with an average of 404 movements per day, followed by Lufthansa (242), Wizz (201), Widerøe (198), with DHL Express (184) level with Air France (184).
    - Averaged across the week, CDG (354) was the busiest airport with an average of 354 movements per day followed by Frankfurt (333), Schiphol (310), with Heathrow (258) level with New Istanbul (258).



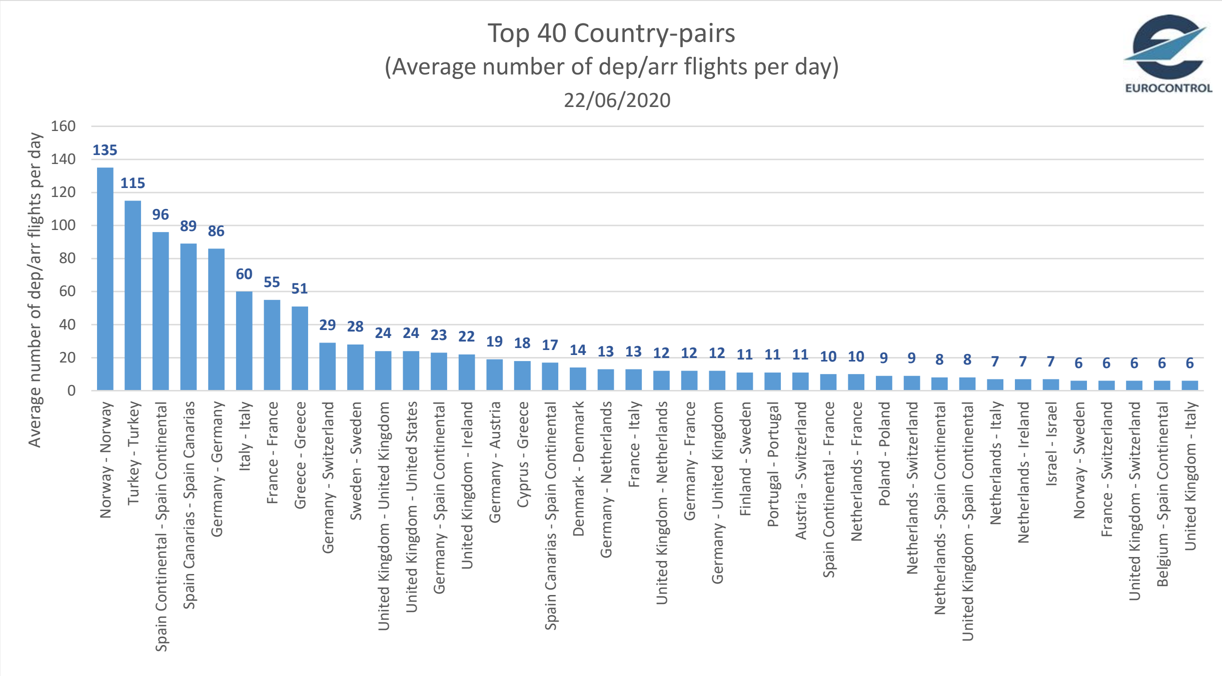
- When zooming in, a constant but slight recovery is clearly visible at network level since mid-April both in terms of variation against 2019 and in absolute number of flights (using 7-day moving average for both indicators).



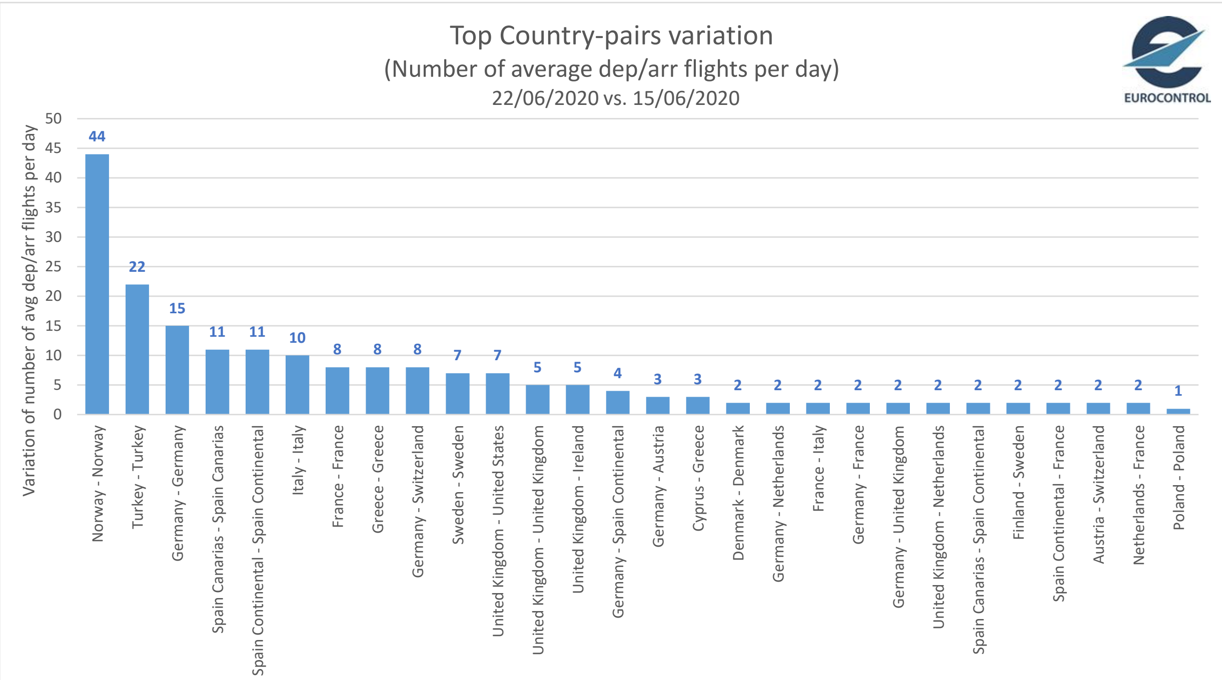
- The largest variation of average daily flights between Monday 15 and Monday 22 June was for Spain with 272 additional flights, followed by Germany (+196), Italy (+155), UK (+134), France (+124).



- When considering departing and arriving flights per country-pairs on Monday 22 June, the domestic flows within Norway were clearly the highest with 135 dep/arr flights a day on average, followed by Domestic flights within Turkey, Spain, Germany, Italy, France and Greece.

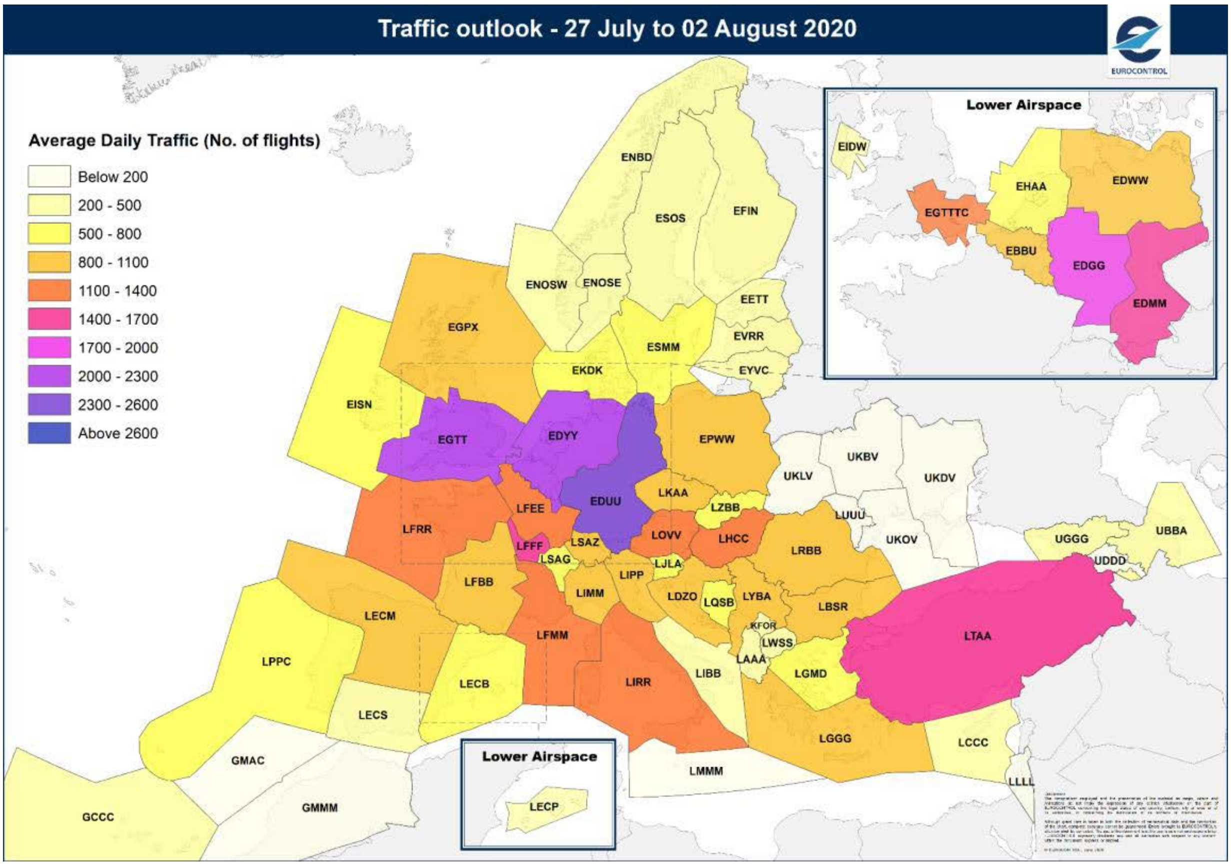


- Between Monday 15 and Monday 22 June, the country-pairs which increased the most were the domestic flights within Norway (+44 dep/arr flights per day on average), followed by the flows within Turkey (+22), within Germany (+15), within Spain (+11) and within Turkey (+10).



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 is expected to reach up to 13.000 flights by beginning of July, getting gradually to up to 15.500 flights by the end of July/beginning of August 2020.
    - This would represent in average for the last week of July 2020 approximately 40% of the traffic during the similar period in 2019.

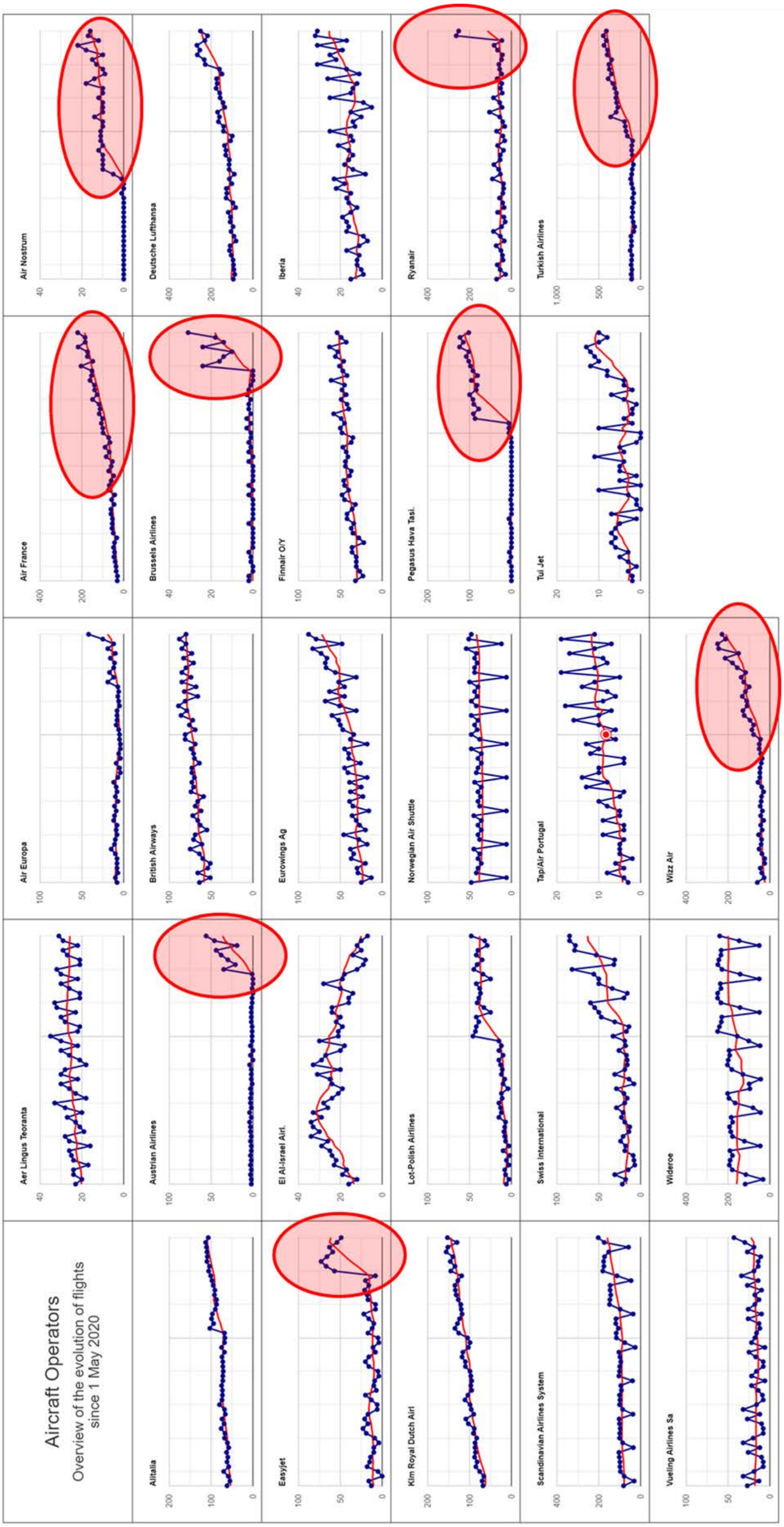


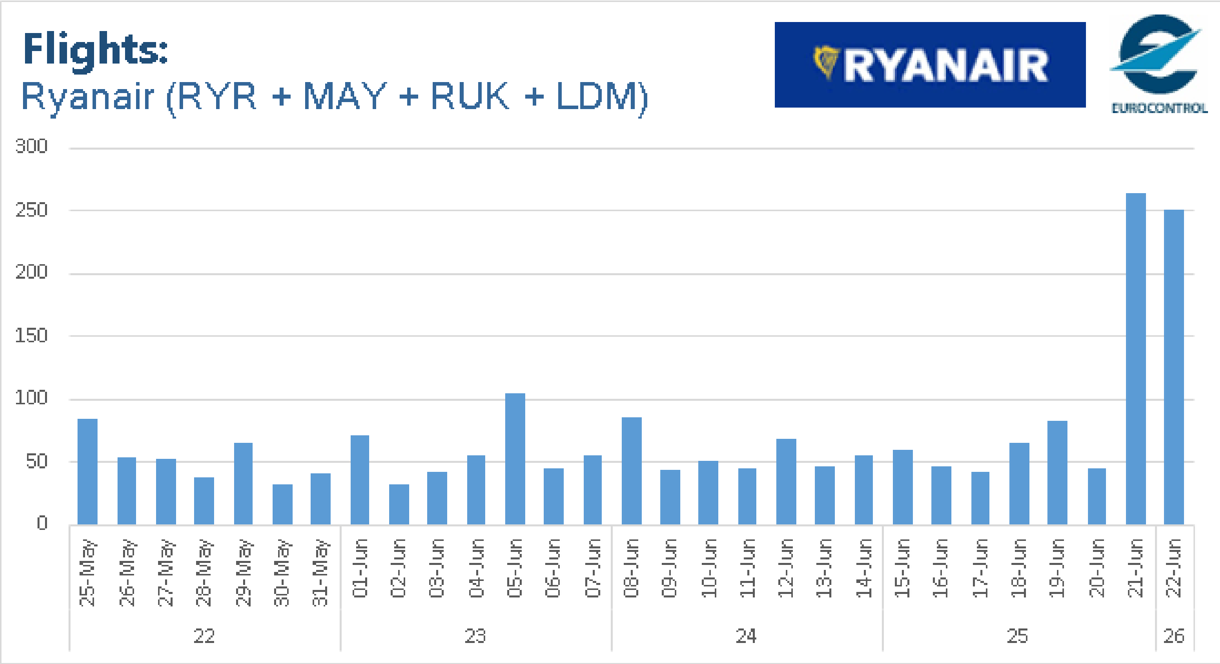
Average Daily Traffic

EUROCONTROL European Network Operations (NOP) 2020 Recovery Plan, 19 June 2020

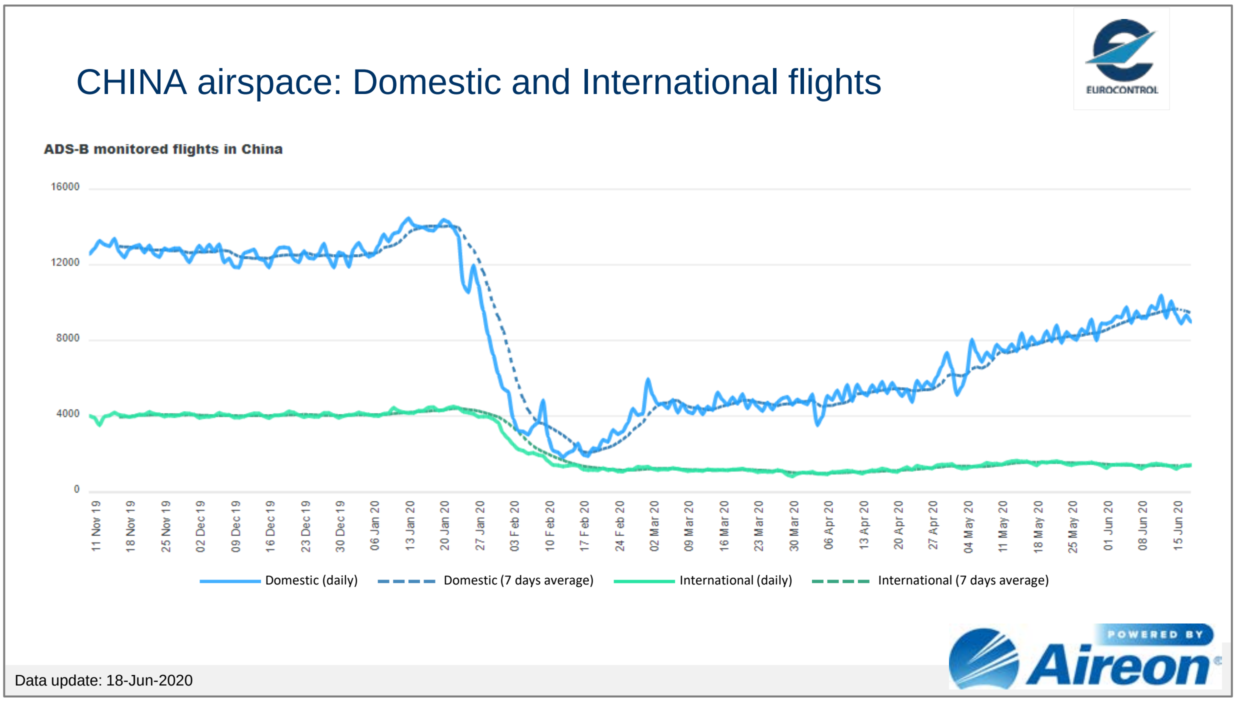
- **European Airline Examples**
  Over the last few weeks, restart is clearly visible for some airlines:
    - Since the beginning of June for Turkish airlines, Wizz Air, Alitalia, Pegasus and LOT airlines.
    - On Monday 15 June for Brussels airlines, Austrian Airlines and easyJet.
    - On Sunday 21 June for Ryanair.
    - 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

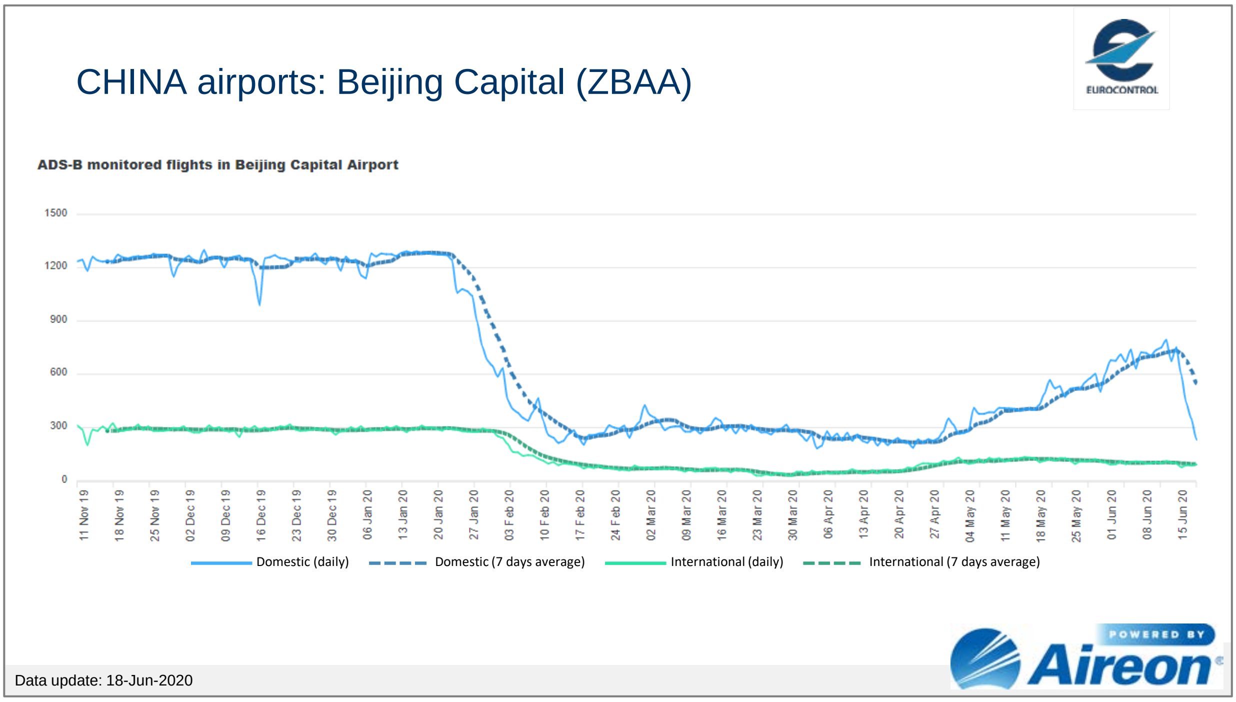




- **Return to Operations - Focus on China**
  - China domestic traffic now running at approximately 75% of average domestic traffic at end 2019, with 9,459 flights – 7-day rolling average to 18 June 2020 (source: EUROCONTROL NM / Aireon).

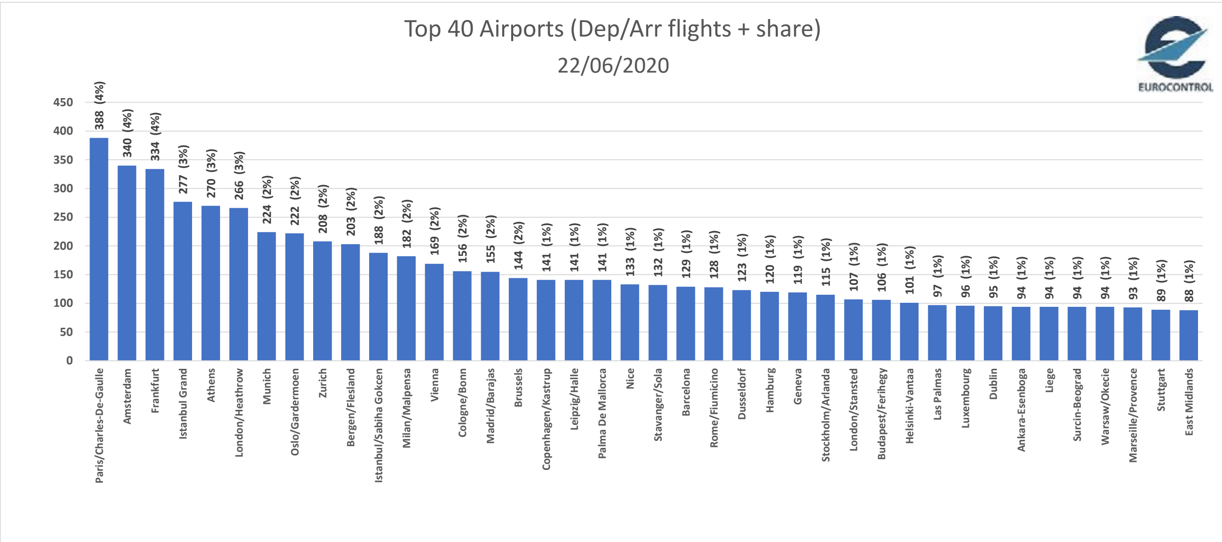


- It must however be noted that due to resurgence of COVID-19 in Beijing, both Beijing Airports have seen a sharp decrease of their operations since 15 June 2020.

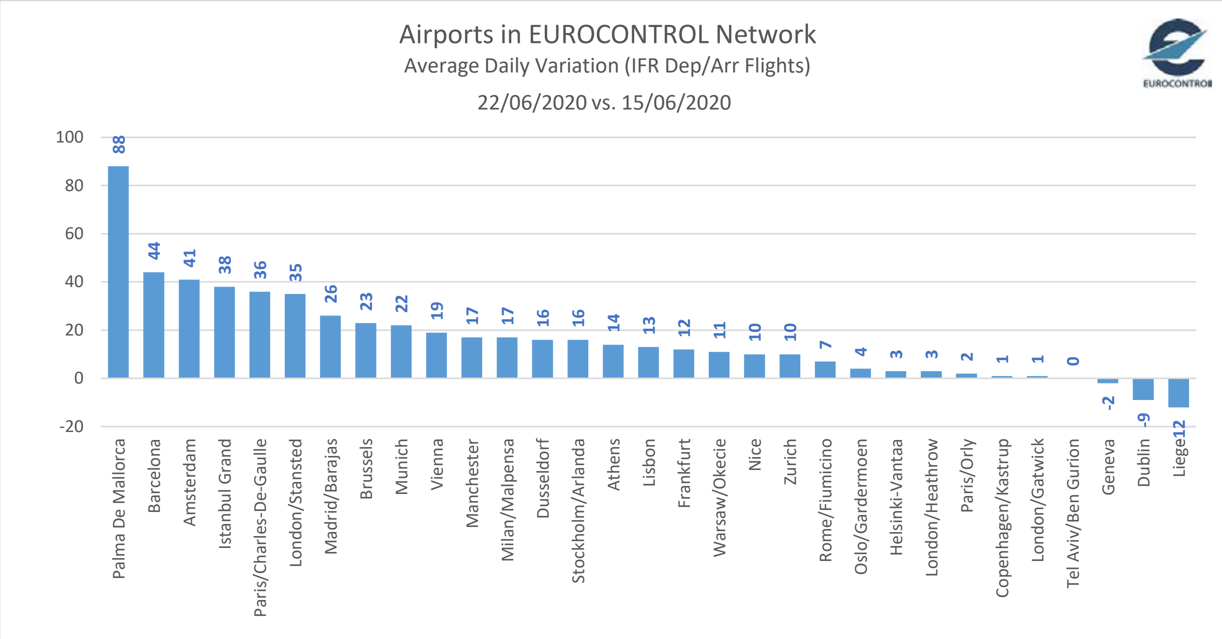


3. Airports:

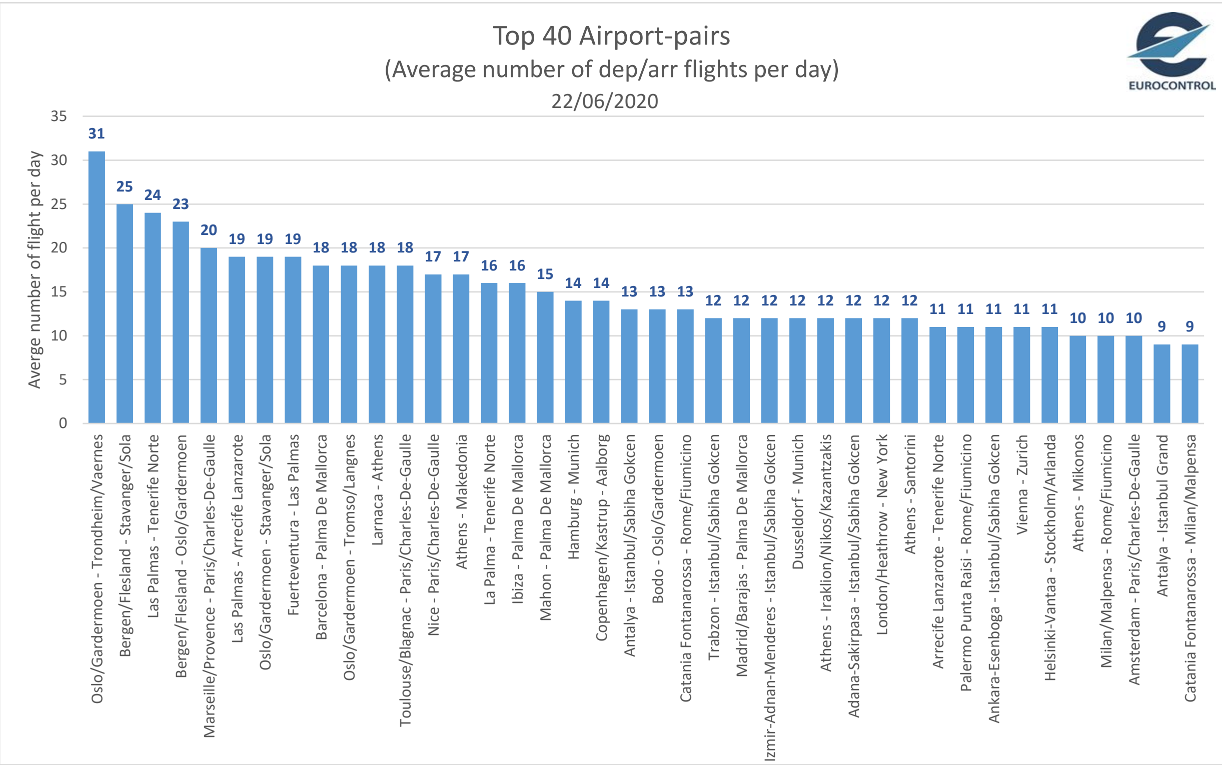
- On Monday 22 June, Paris/CDG was the busiest airport with 388 movements, followed by Amsterdam (340), Frankfurt (334), Istanbul/Grand (277), Athens (270), London/Heathrow (266), Munich (224) and Oslo (222).



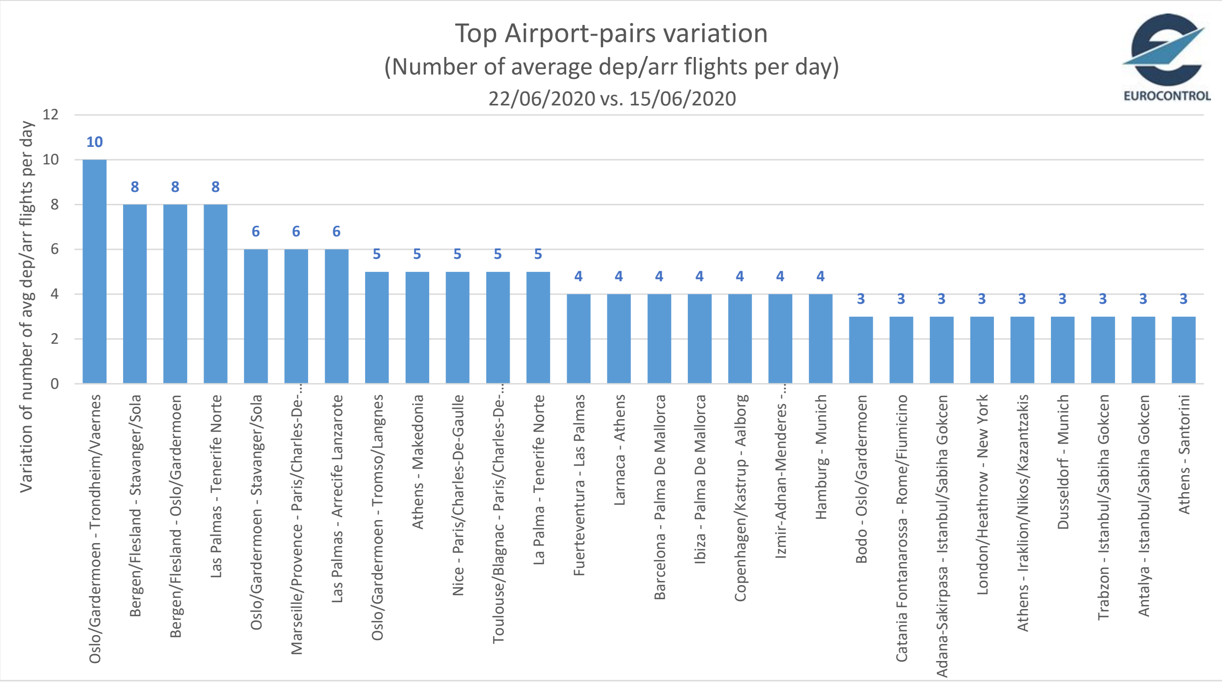
- The largest variation of average daily flights between Monday 15 and Monday 22 June was for Palma de Mallorca with 88 additional flights, followed by Barcelona (+44), Amsterdam (+41), Istanbul Grand (+38), Paris CDG (+36) and London Stansted (+35).



- On Monday 22 June, the airport-pairs which accounted the most were flows between Norwegian airports with more than 25 dep/arr flights a day on average (reaching 31 between Oslo and Trondheim), Las Palmas/Tenerife was 3rd with 24, Marseille/Paris CDG was 5th with 20. All other top 40 airport pairs are around 9-19 dep/arr flights a day on average.



- Between Monday 15 and 22 June, the airport-pairs which increased the most were the flows within Norway (+8 -10 dep/arr flights per day on average), followed by Las Palmas-Tenerife (+8), and Marseille-Paris/CDG (+6).

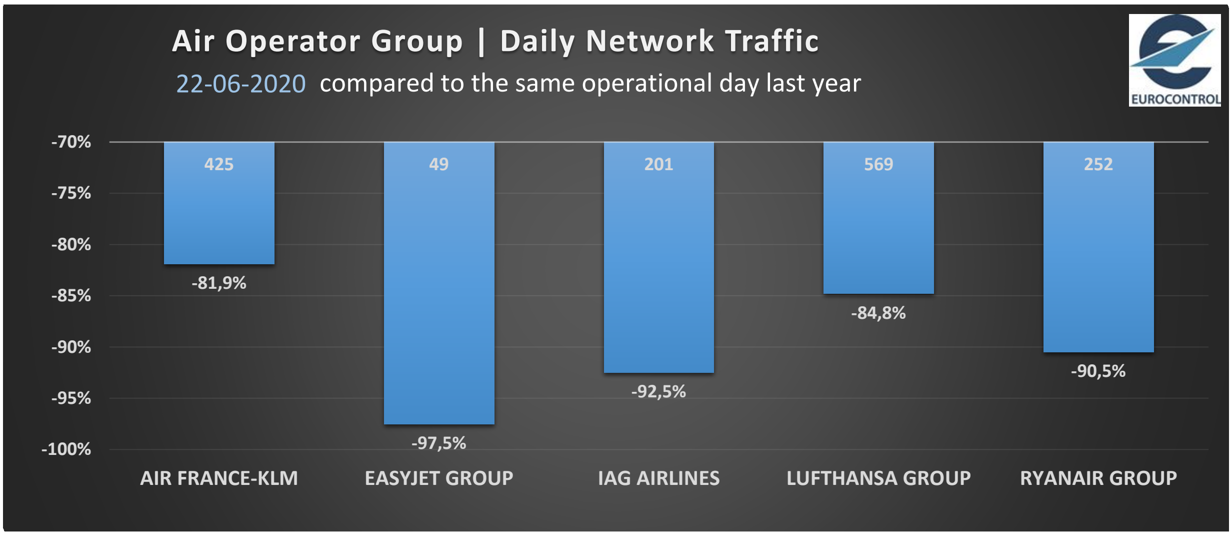


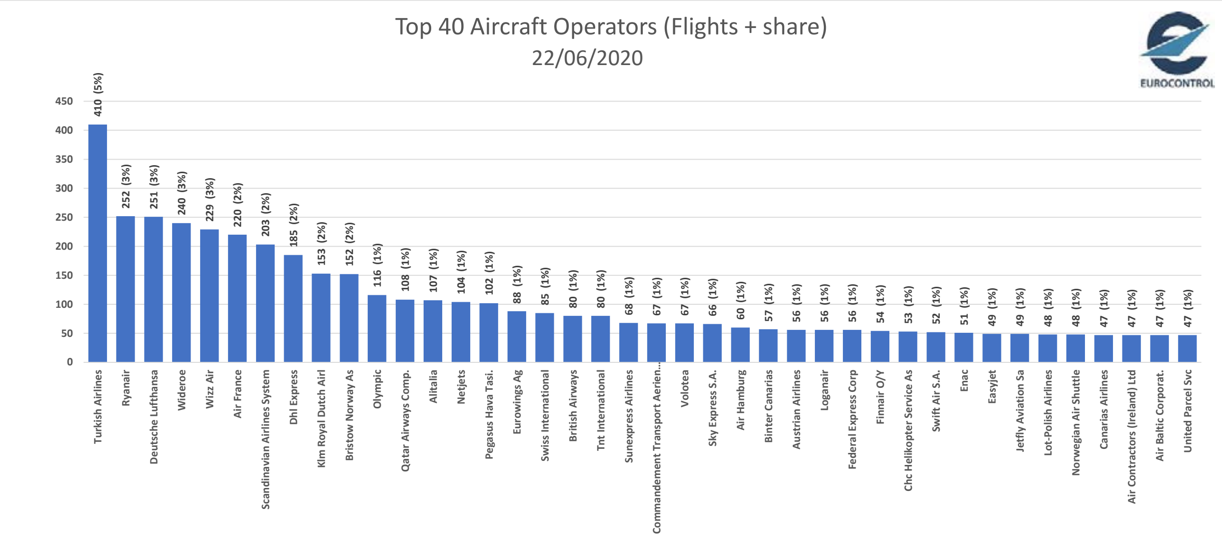
4. <u>Airlines</u>

- For the largest Air Operator Groups, the reductions on **Monday 22 June** were: easyJet -97.5%, Ryanair Group -90.5%, IAG Airlines -92.5%, Lufthansa Group -84.8% and Air-France-KLM -81.9%.

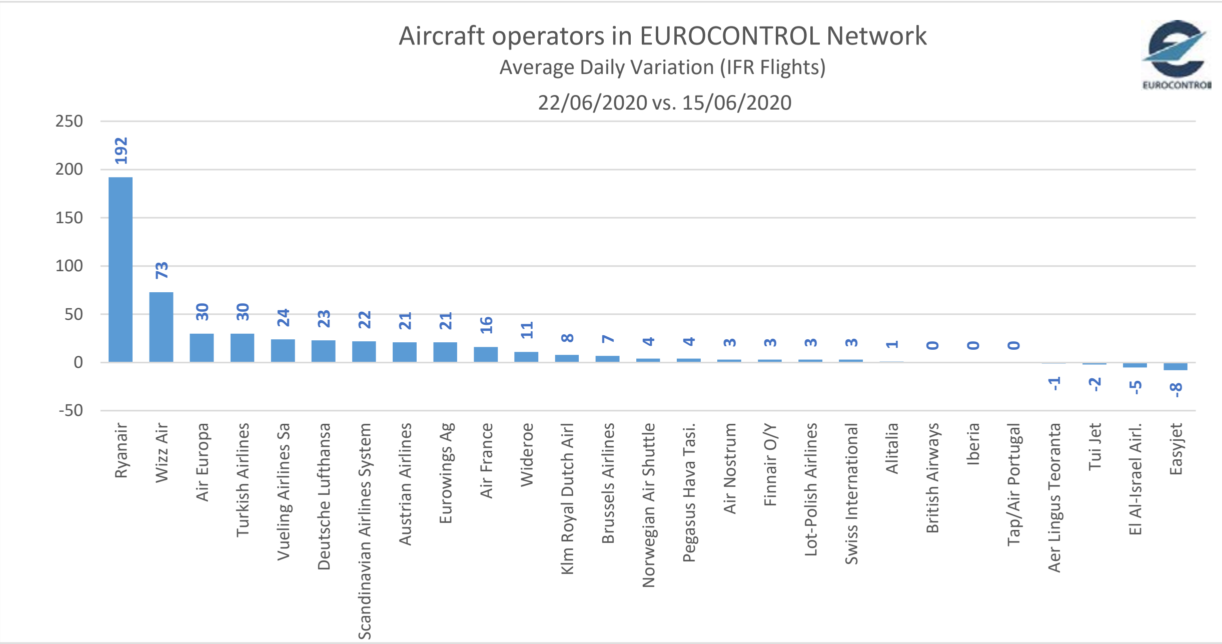
- On Monday 22 June, compared to 2019, TUI Jet was -98%, easyJet -98%, TAP -97%, Iberia -92%, British Airways -92%, Ryanair -91%, Lufthansa -85%, Air France -82%, KLM -80%, SAS -78%, Turkish Airlines -72%, Wizz Air -66% and Widerøe -32%.

- Turkish Airlines was the busiest airline with 410 movements, followed by Ryanair (252), Lufthansa (251), Widerøe (240), Wizz Air (229), Air France (220), SAS (203) and DHL Express (185).



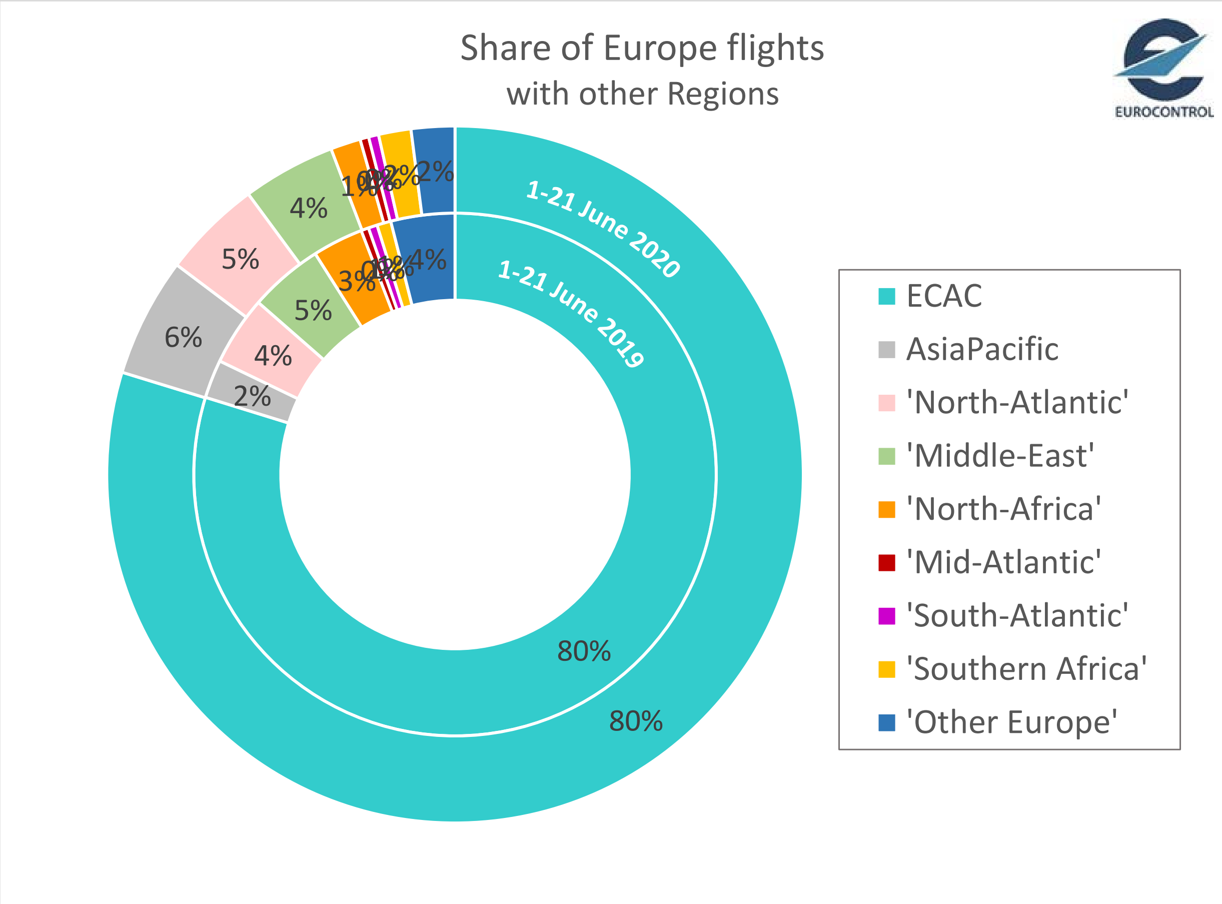


- The largest variation of average daily flights between Monday 15 and Monday 22 June was for Ryanair with 192 additional flights followed by Wizz Air (+73), Air Europa (+30) and Turkish Airlines (+30).



5. **<u>ECAC – Worldwide Regions Traffic:</u>**

- 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.

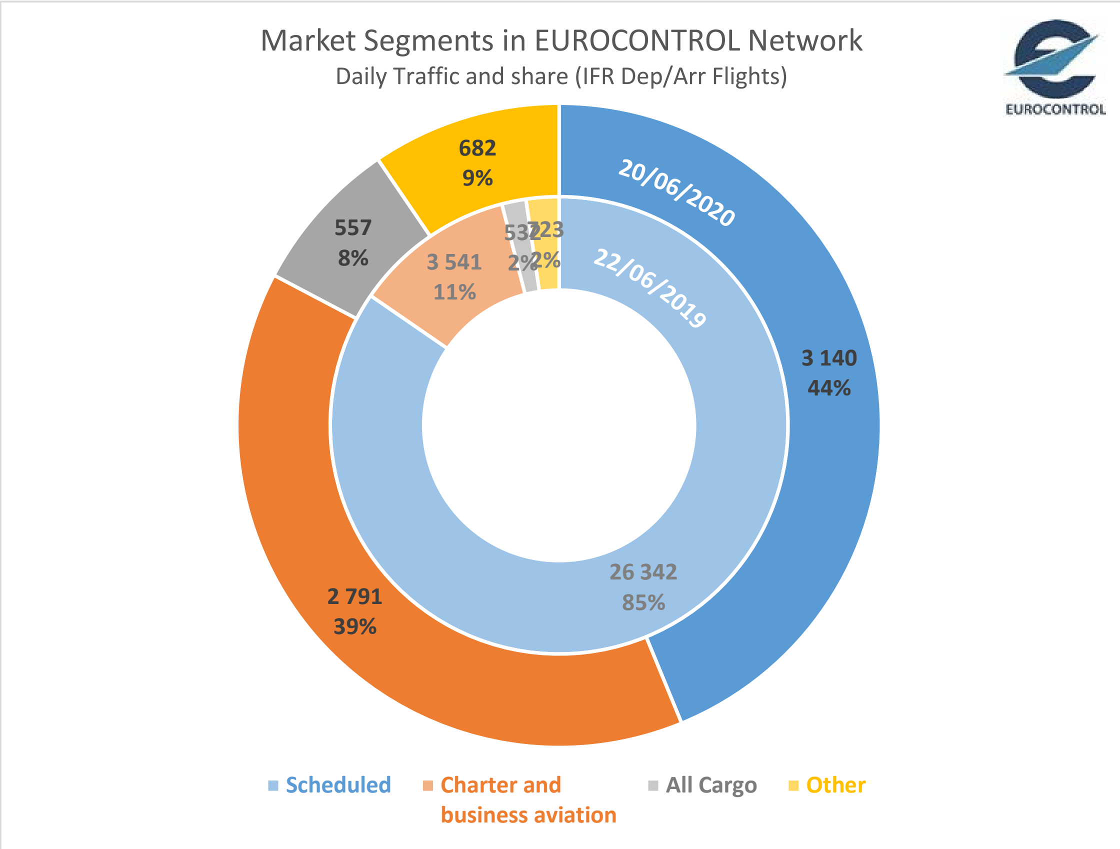


- Over the first 21 days of June, the intra-ECAC flows represented 5104 flights on average per day.

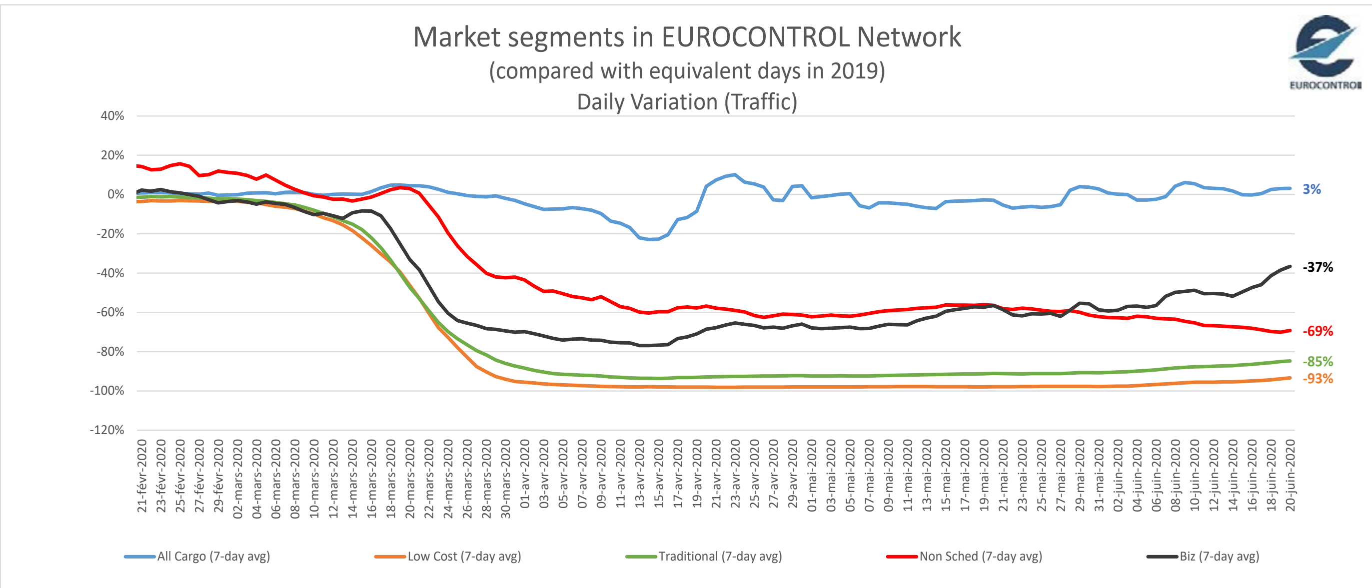
ECAC<->	Period 1-21 June 2020		21/06/2020 compared with 14/06/2020		
	Total number of flights	Avg daily number of flights	Total number of flights	Variation (Delta)	Variation (%)
ECAC	107 177	5 104	5401	1687	45,4%
AsiaPacific	7 438	354	330	-15	-4,3%
'North-Atlantic'	6 202	295	318	0	0,0%
'Middle-East'	5 808	277	293	23	8,5%
'North-Africa'	1 877	89	88	8	10,0%
'Mid-Atlantic'	541	26	22	-8	-26,7%
'South-Atlantic'	626	30	32	1	3,2%
'Southern Africa'	2 022	96	84	-11	-11,6%
'Other Europe'	2 719	129	168	15	9,8%

6. Market Segments (Up to 20 June 2020)

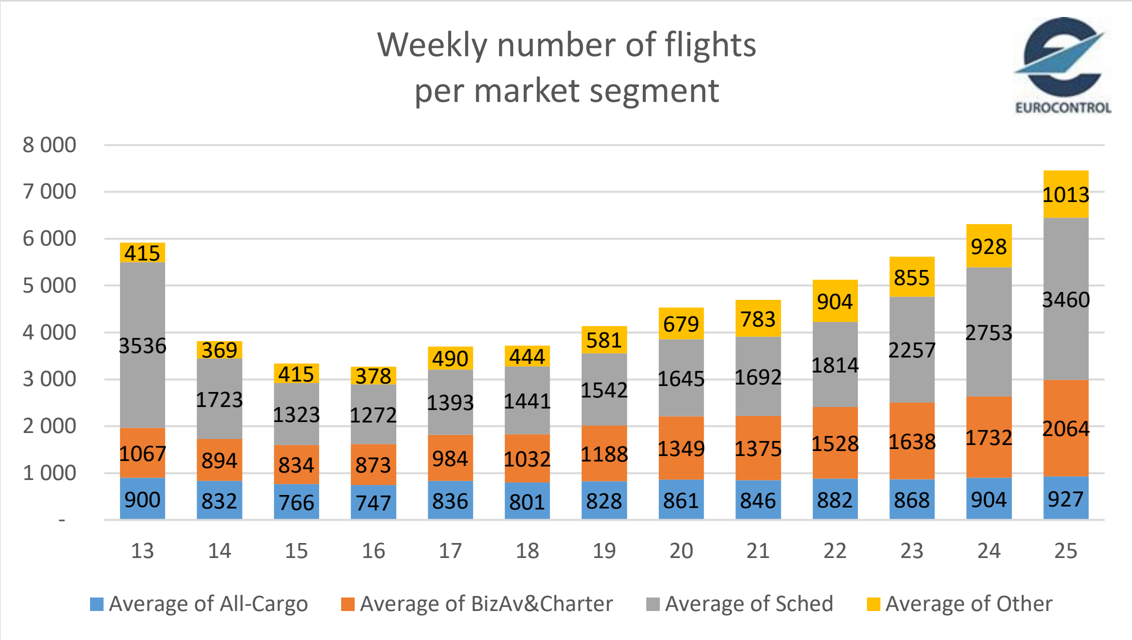
- This time last year, all-cargo flights accounted for about 2% of total Departure / Arrival flights, whereas now, it accounted for 8% on 20 June 2020. The share of scheduled traffic, which accounted for 85% reduced to 44%.

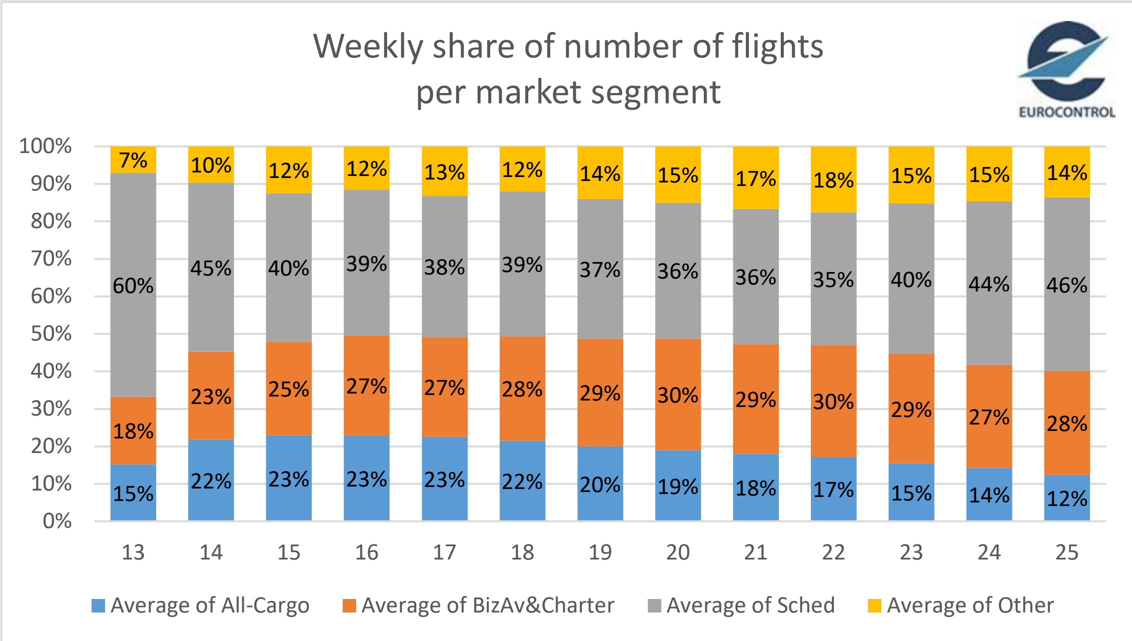


- During the crisis, all-cargo flights remained stable at the 2019 level with a variation around the Easter period (both 2019 and 2020) while scheduled and low-cost traffic reduced by 87% (respectively 95%) during the crisis. The recovery of business flights since mid-April must be noted.



- 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 (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.