COVID19 Impact on European Air Traffic
EUROCONTROL Comprehensive Assessment

EUROCONTROL

Wednesday, 1 July 2020

Traffic Situation & Airlines Recovery

- 12,742 flights on Wednesday 1 July (up to 55% with +4,515 movements compared to Wednesday, 17 June). Significant increase on 1st July for many airlines, in particular Ryanair with more than 800 additional flights compared to 2 weeks before (+1905%).
- Almost all airlines increased significantly their operations on 1st July, easyJet (+215% over 14 days), Wizz Air (+116%), Vueling (+607%), Air France (+84%) and British Airways (+66%).
- On 1st July, traffic at 35% of 2019 level. Expect to reach 40% at the end of July with 16,500, reaching 50% in the first week of August with 18,000 flights.
- Traffic in line with latest traffic scenarios published by EUROCONTROL on 24 April for June and is likely to remain in line during the summer.
- Significant increase in southern States over the last 2 weeks with +286% for Spain, +112% for Italy, +108% for Greece and +149% for Portugal.
- All-cargo flights remain stable while business aviation is recovering fast reaching -35%.

Traffic Flows & Country Pairs

- The major traffic flow is the intra-Europe flow with 10,869 flights on 1st July. All flows have seen a significant increase over the last 2 weeks (up to 63% for intra-Europe flows but still -61% vs 2019).
- Domestic flows are still the most important (i.e. the top 8 flows are domestic). However, the flows to/from southern European countries (Germany-Spain +307%, UK-Spain +585%, Germany-Turkey +85%, Germany-Greece +372%) are showing significant increase over the last 2 weeks.

Situation outside Europe

- **China:**
  - Domestic traffic is constantly increasing since mid-April reaching 10,338 flights on 28 June.
  - International traffic is flat with 1,208 flights and overflights are even slightly decreasing to 468.
  - However, Beijing Capital and Daxing airports have seen a significant and quick drop of traffic due to the local COVID-19 outbreak with decreases of some 76% (resp. -81%) in just a few days.
- **United States:**
  - After a significant drop of traffic in the US by the end of March, Domestic traffic is slightly improving since beginning of May reaching -65% of 2019.
  - However, the international flows are still very low at some -90% except flows to/from Mexico.

Airport Information

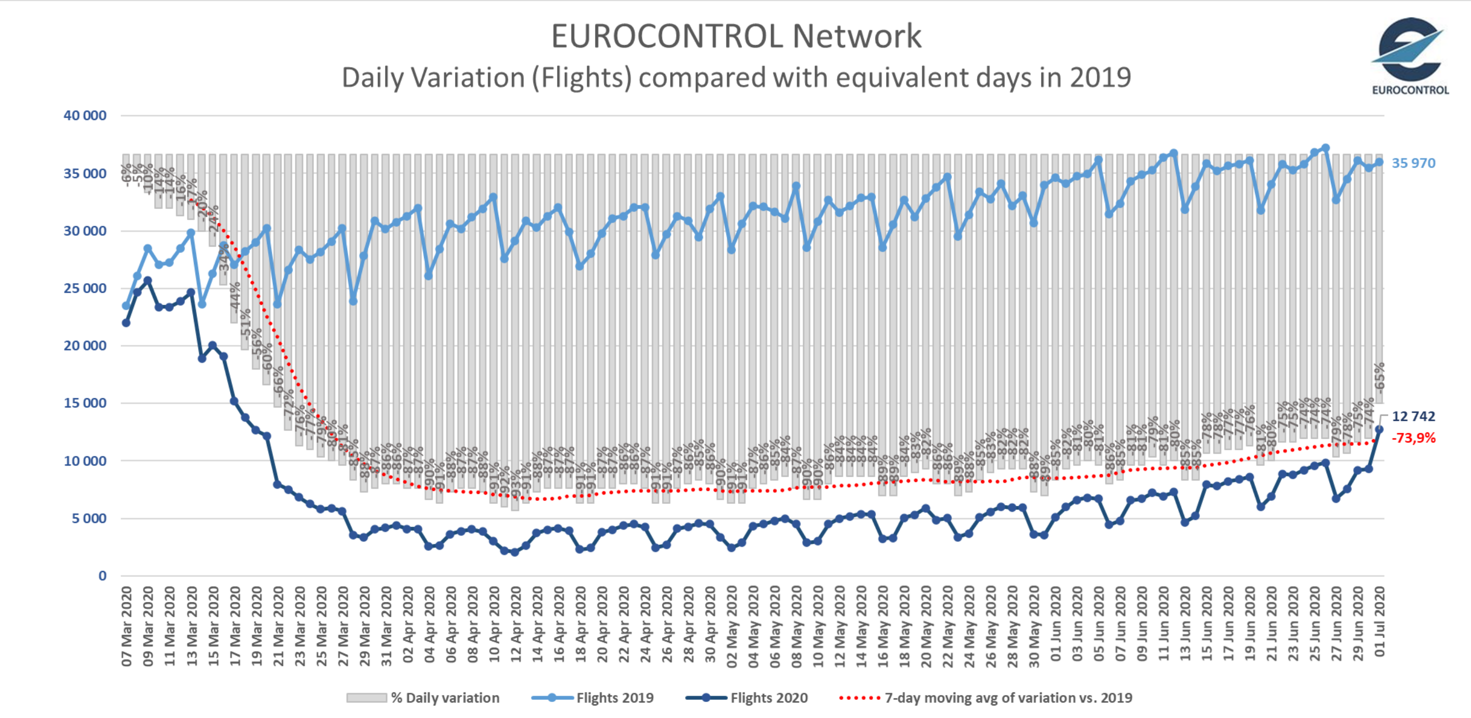
- Paris/CDG was the busiest airport with 530 dep/arr flights on 30 June.
- Significant increase on 1st July for many airports but particularly for southern airports like Palma de Mallorca (+625%), Barcelona (+257%), Ibiza (+776%), Malaga (+584%).
- After having reached some 64,000 passengers at European airports on 11 April (i.e. -99% compared to 2019), the situation is gradually improving to 682,000 on 21 June (i.e. -92% compared to 2019).
- Paris-Orly reopened on 26 June.

Economic

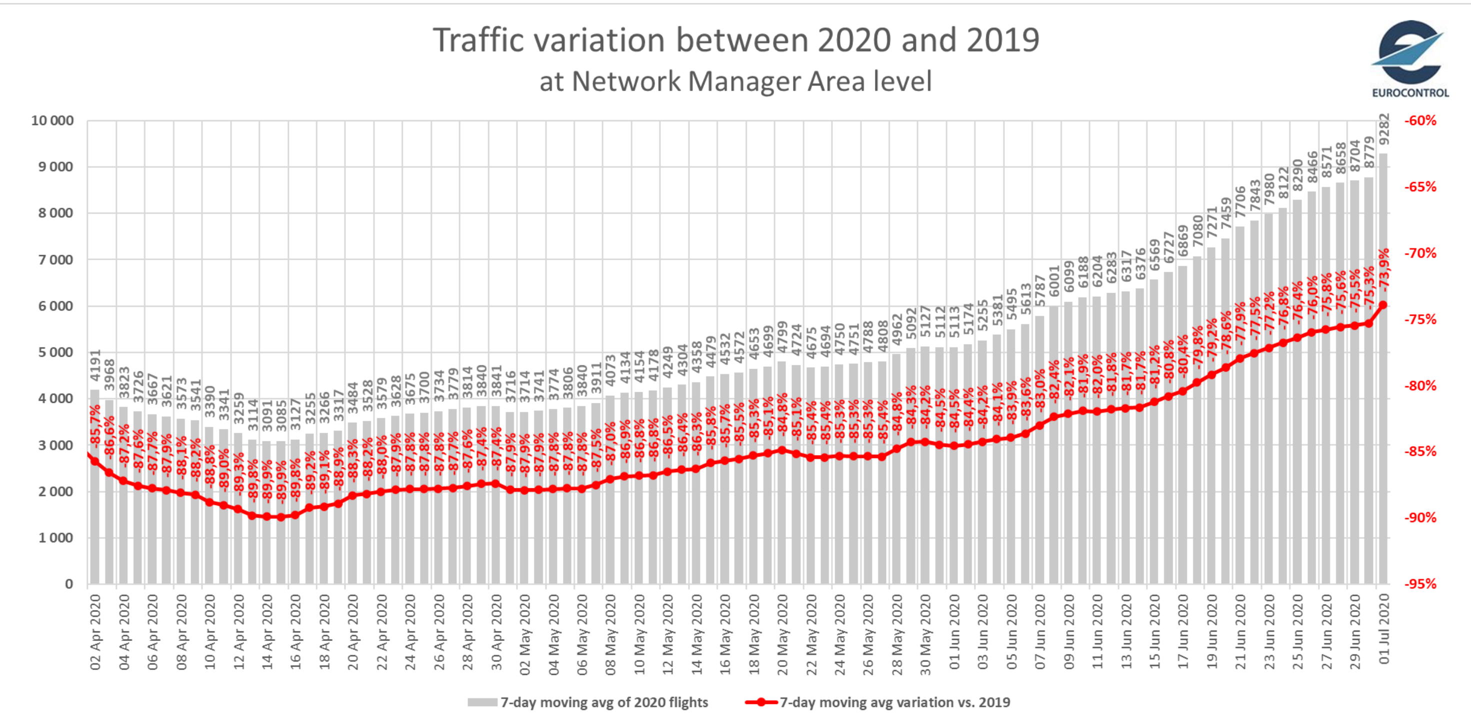
- **Jet Fuel price:** Was above 500€ per tonne at the beginning of 2020, then dropped suddenly to a minimum of 173€ in April. Since then, jet fuel price per tonne has constantly increased by 70% to reach 295€ in June.
- **En-route air navigation charges:** The billing of en-route charges went down to 73M€ for the month of April (i.e. -89% compared to plan). It went up to 95M€ for May and it is expected to increase for June, considering the increase of IFR flights.

1. Traffic Situation and Airlines Recovery

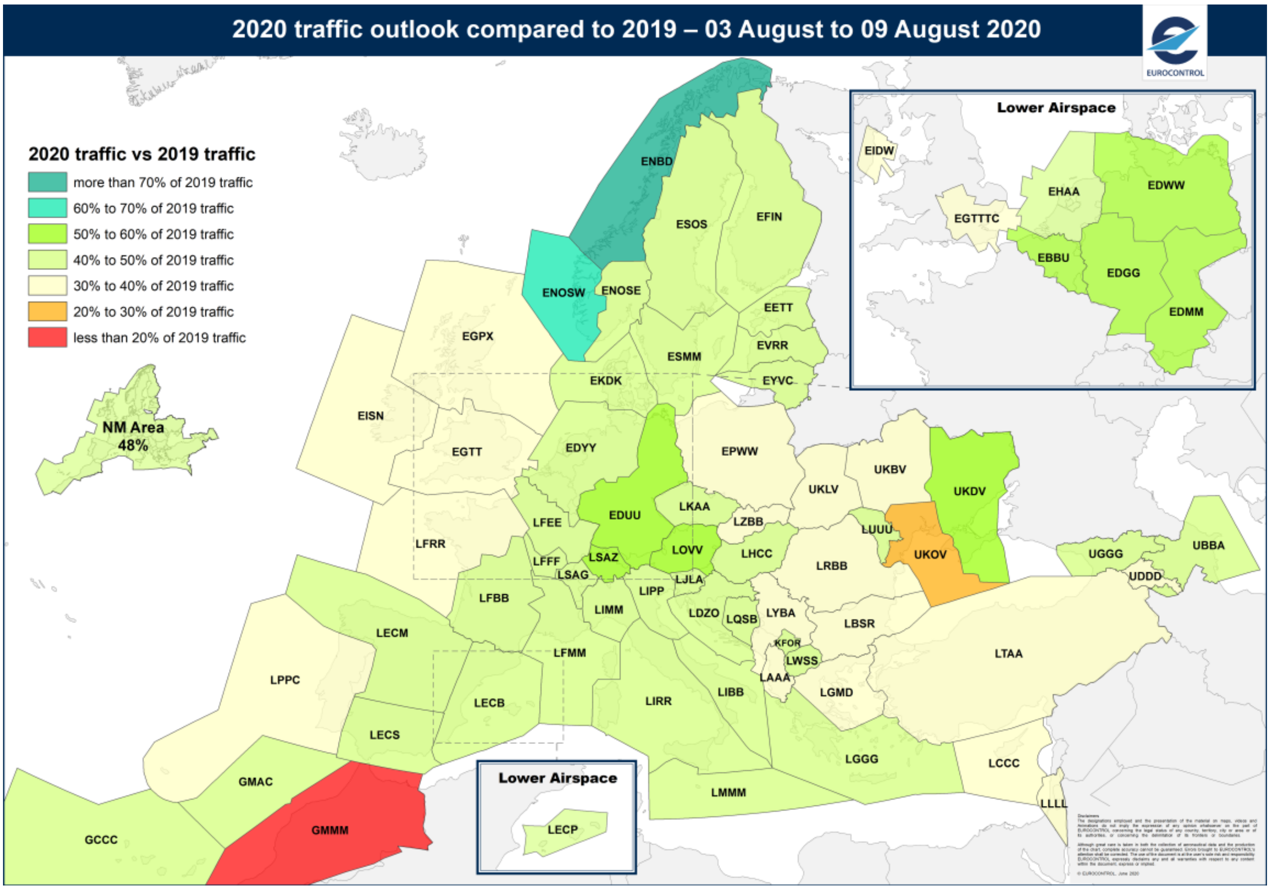
- 12,742 flights on Wednesday 1 July (up to 55% with +4,515 movements compared to Wednesday, 17 June). Significant increase on 1st July for many airlines.



- Steady increase of flights since mid-April (+200%) reaching -73.9% compared to 2019 on a 7-day moving average and -64.6% on 1st July.



- **NOP Recovery Plan:** Based on the assumption that the states will continue to relieve travel restrictions as planned and the airlines start operating a revised summer schedule, the network traffic is expected to reach up to 16,500 flights during the month of July and may go up to 18,000 flights in August 2020. This would represent during the first weeks of August 2020 up to 50% of the traffic during the similar period in 2019. A significant increase in traffic is noted for the South West axis.

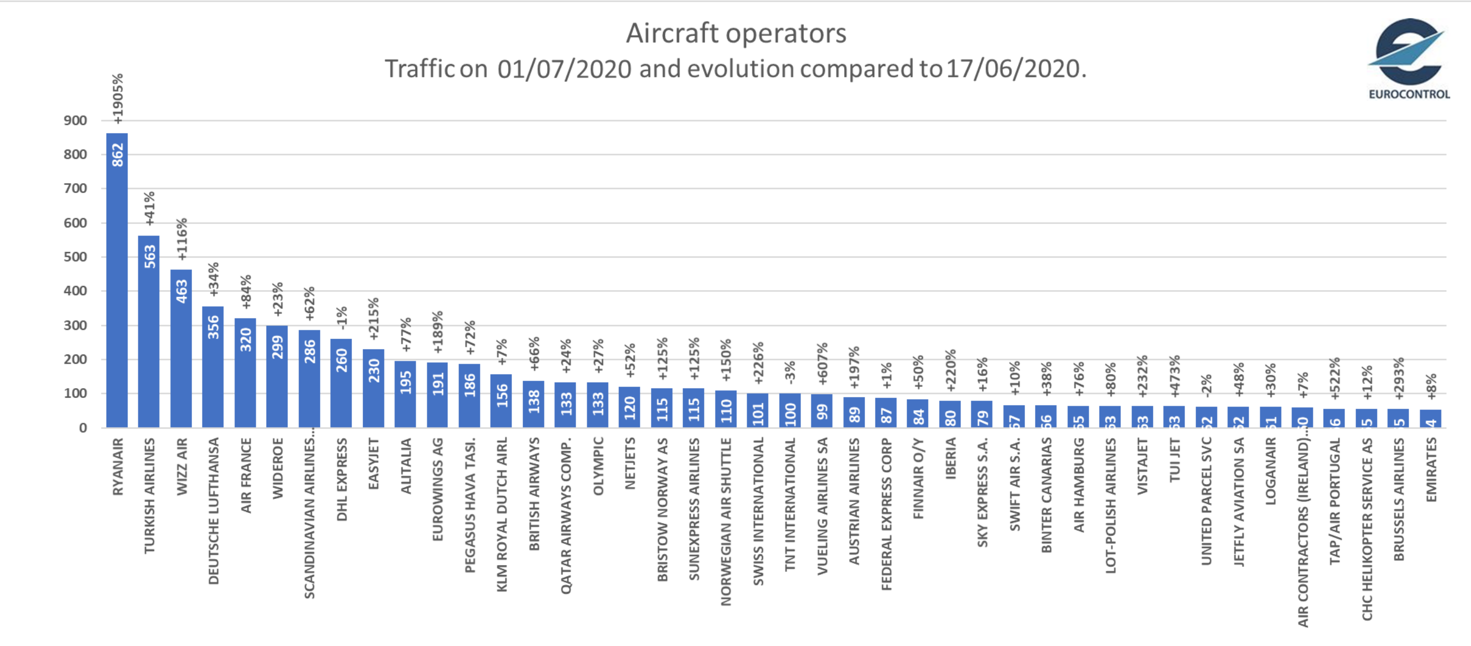


- Examples of recent and future European airlines plans:

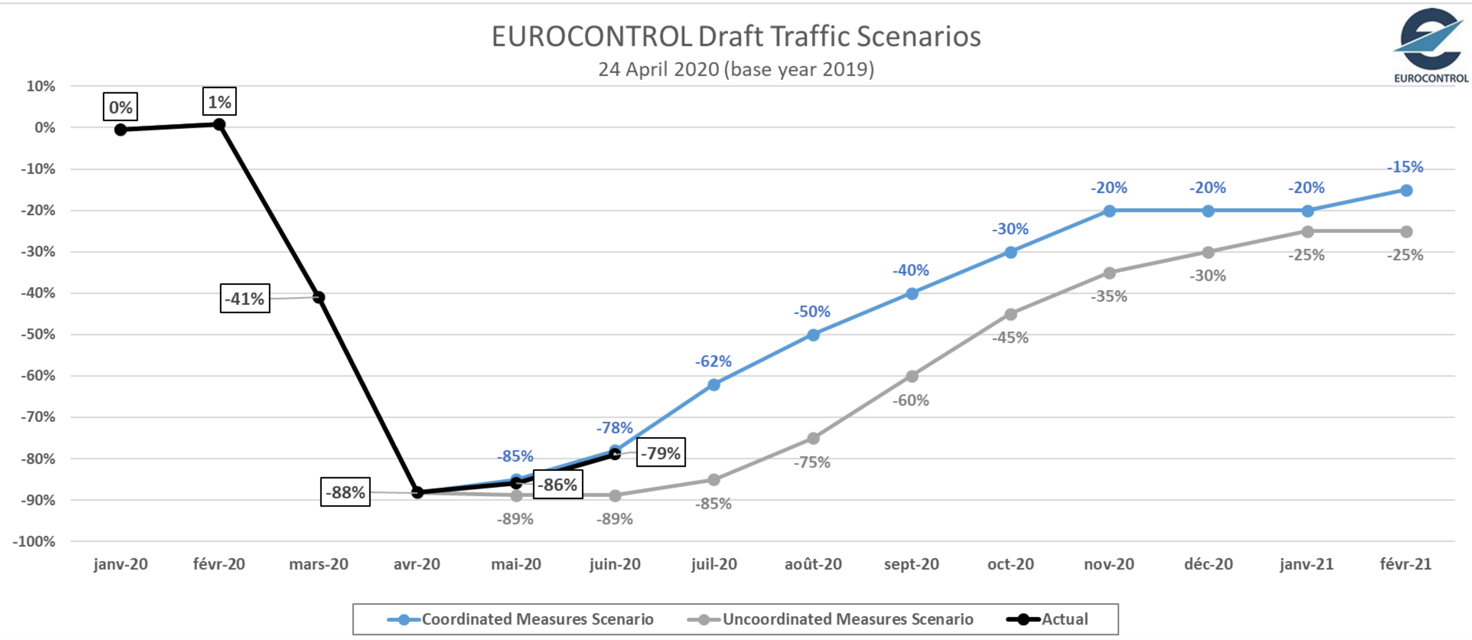
European airlines	Recent and Future	Share of all flights 2019
Ryanair Group	1st July week-on-week increase from ~200 to close to 900 movements Lauda to resume 64 routes from Vienna base as of 1st July [25/6].	8.5%
easyJet	Will operate 500 flights/day in Europe including 900 flights/week to/from 14 UK airports as from 1st July [25/6].	6.2%
Turkish Airlines	Resumed flights to USA as from 19 June [17/6]	4.3%
British Airways	CityFlyer to resume operations from London City in July [23/6].	3.0%
KLM	Expects to restore 75% of its capacity in August, serving 95% of its European (planned) destinations [23/6].	2.4%
Norwegian Airlines	Resumption of int'l flights (76 EU routes) as of 1st July [16/6].	2.1%
Austrian Airlines	Anticipates 40% of its fleet to be operational by end July [23/6].	1.4%
LOT	Plans to operate more 30 EU destinations as of 1st July [18/6].	1.3%

- Ryanair was by far the airline having the highest number of flights with 862 flights on 1st July. It experienced the highest growth over the last 2 weeks and particularly on 1st July with +1905% compared to 17 June.

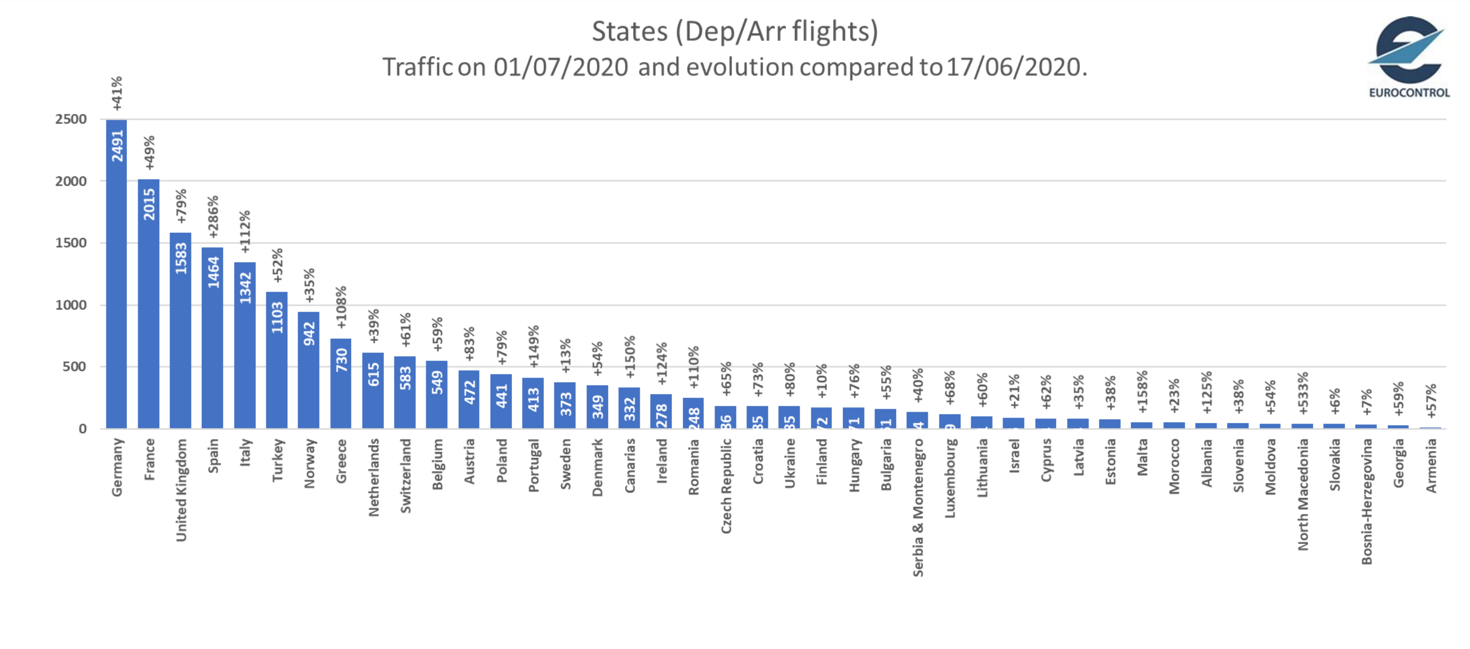
- Almost all airlines increased significantly their operations on 1st July, in particular easyJet (+215%), Wizz Air (+116%), Vueling (+607%), Air France (+84%) and British Airways (+66%).



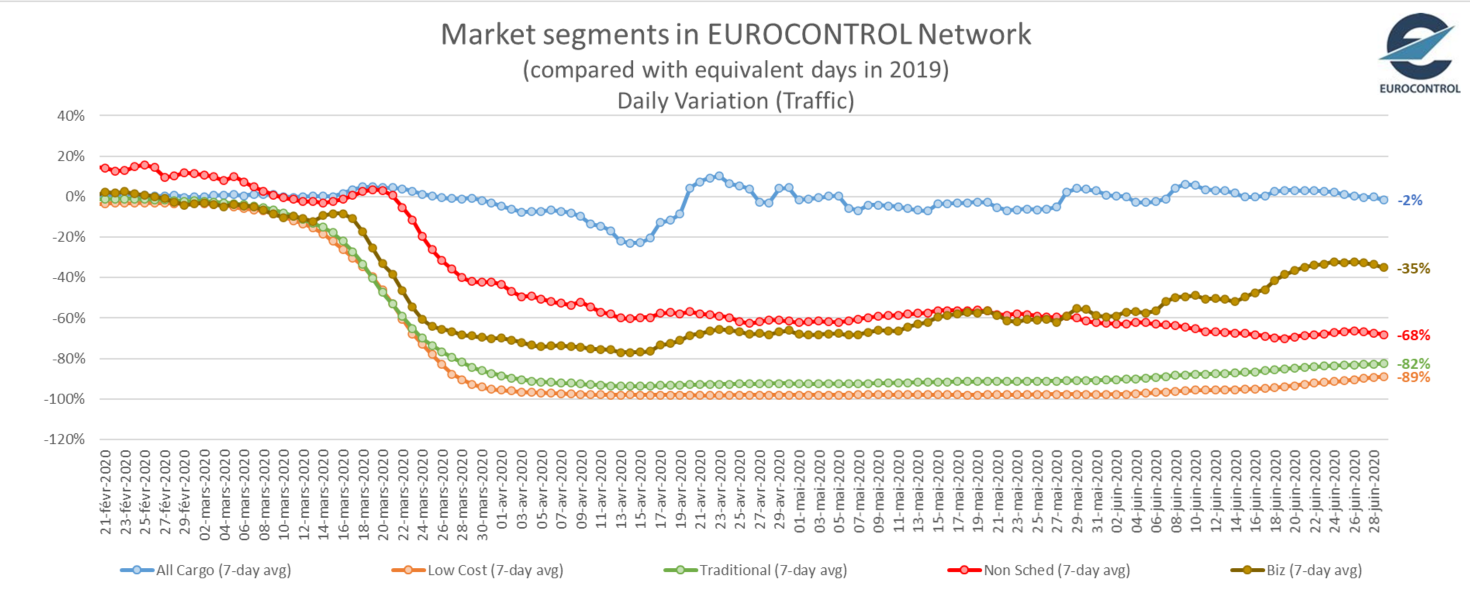
- June traffic is in line with the EUROCONTROL traffic scenario of 24 April with -79% compared to June 2019.



- The ranking of States is progressively back to the ranking before COVID. To be noted the significant increase in southern States over the last 2 weeks with +286% for Spain, +112% for Italy, +108% for Greece and +149% for Portugal.



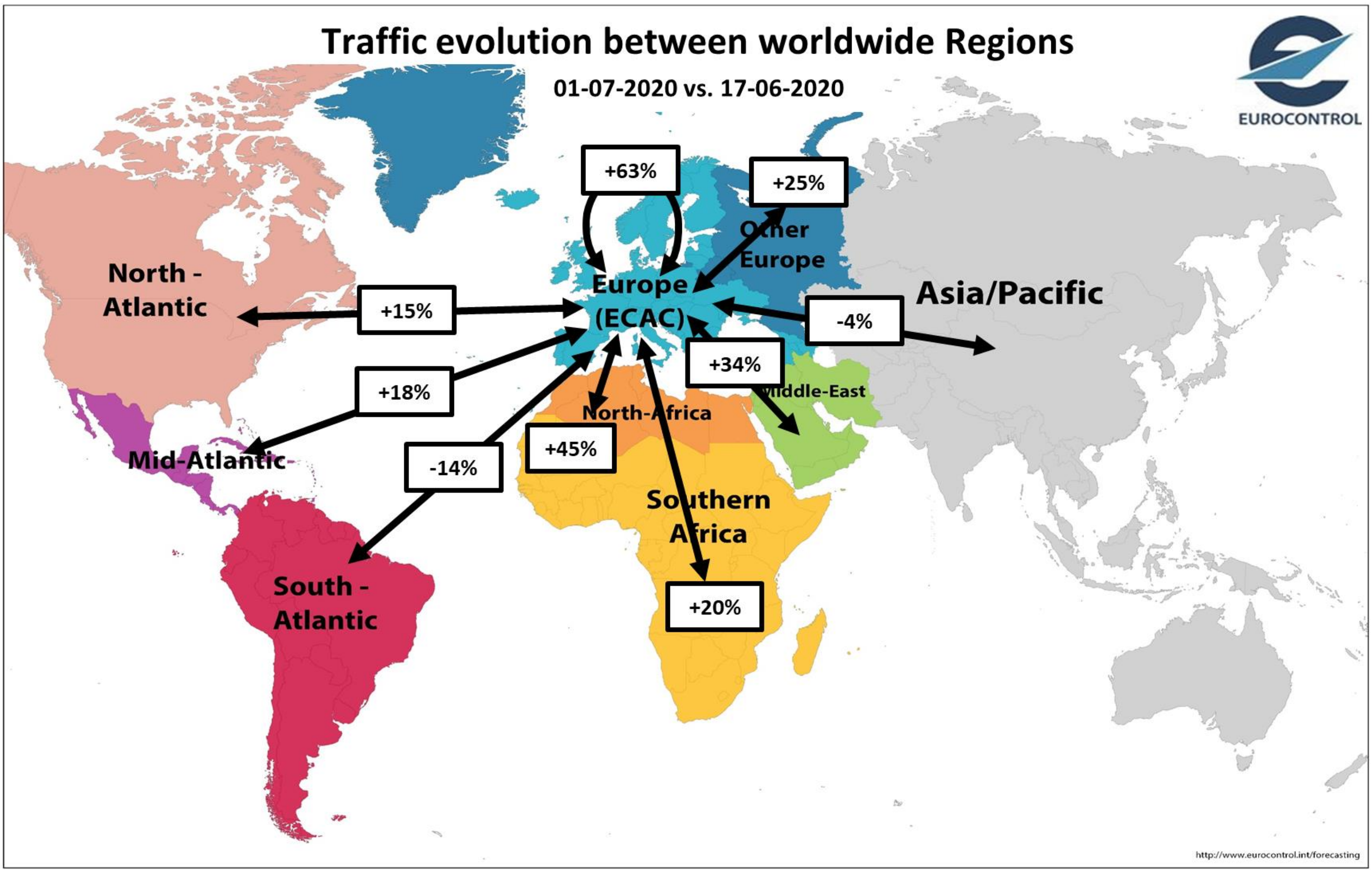
- When considering market segments, while all-cargo flights remained stable during the crisis, business aviation is recovering much faster than traditional or low cost flights reaching -35% compared to 2019.



2. Traffic Flows & Country Pairs

- The major traffic flow is the intra-Europe flow with 10,869 flights on 1st July. These flows have also seen a significant increase over the last 2 weeks (up to 63% for intra-Europe flows but still -61% vs 2019).

REGION	17/06/2020	01/07/2020	%	vs. 2019
Intra-Europe	6656	10869	+63%	-61%
Europe<->Asia/Pacific	338	326	-4%	-61%
Europe<->Mid-Atlantic	28	33	+18%	-79%
Europe<->Middle-East	296	397	+34%	-76%
Europe<->North Atlantic	288	331	+15%	-77%
Europe<->North-Africa	98	142	+45%	-87%
Europe<->Other Europe	162	202	+25%	-85%
Europe<->South-Atlantic	44	38	-14%	-80%
Europe<->Southern Africa	101	121	+20%	-61%



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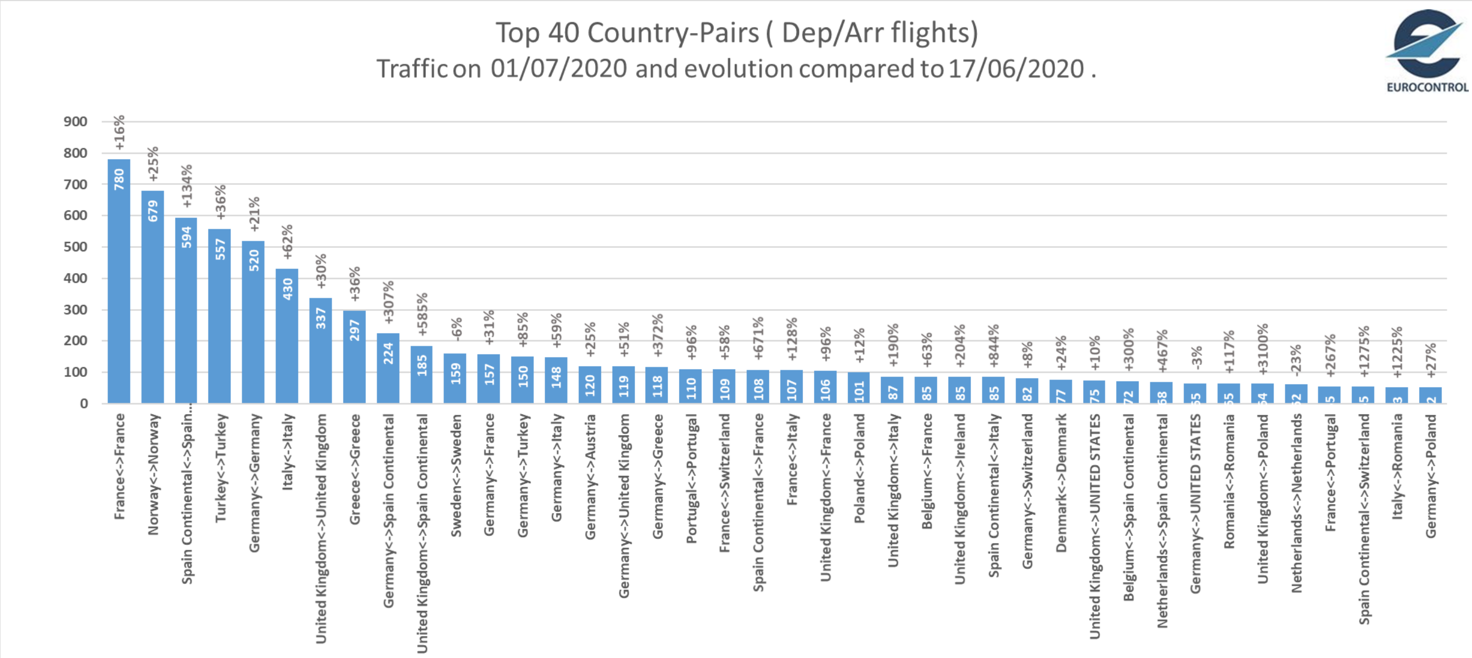
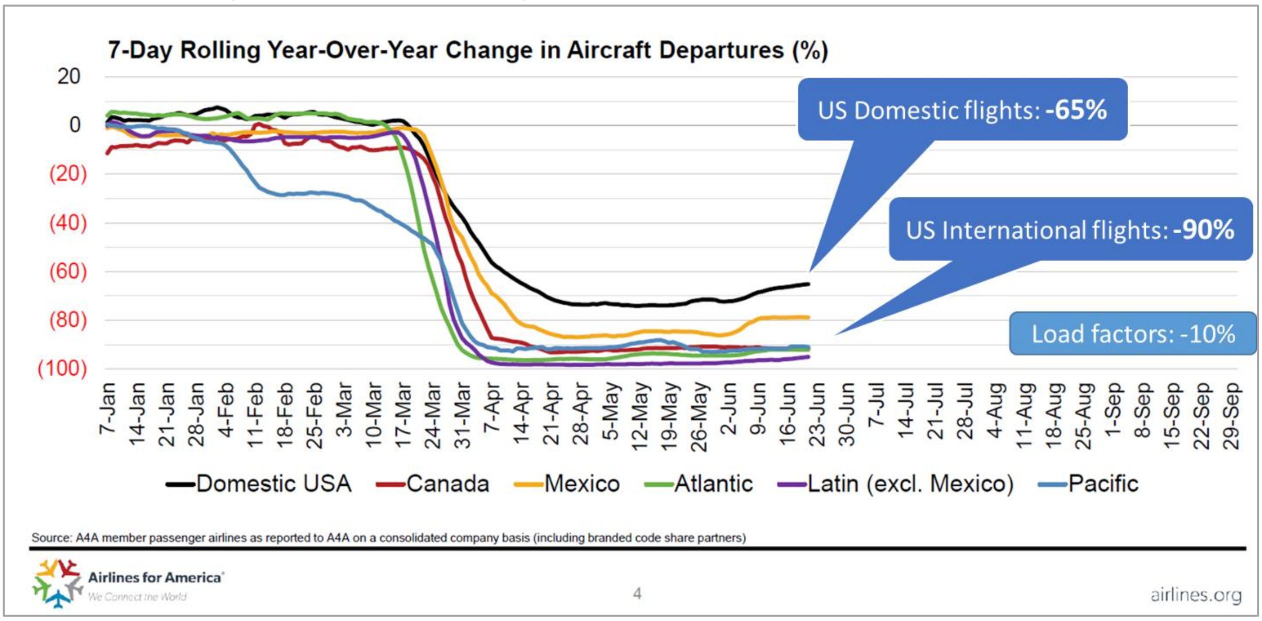
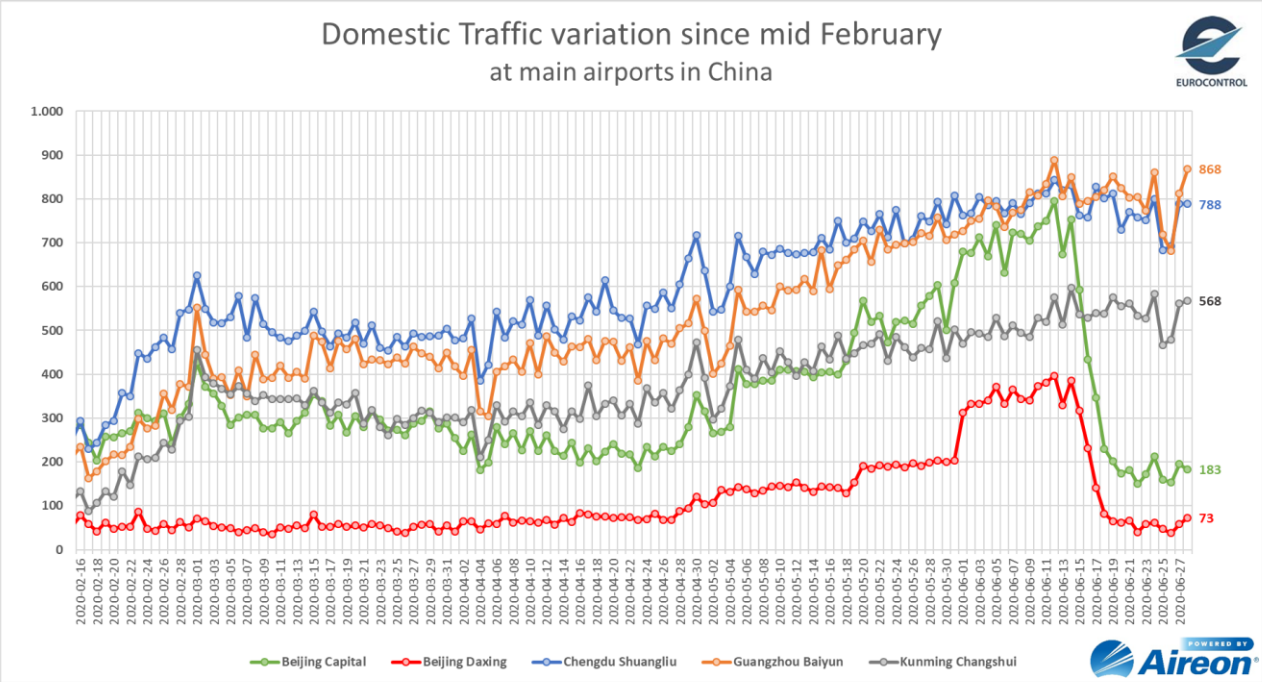


3. Situation outside Europe

- **United-States:** After a significant drop of traffic in the US by the end of March, Domestic traffic is slightly improving since beginning of May reaching -65% of 2019. However, the international flows are still very low at some -90% except flows to/from Mexico.



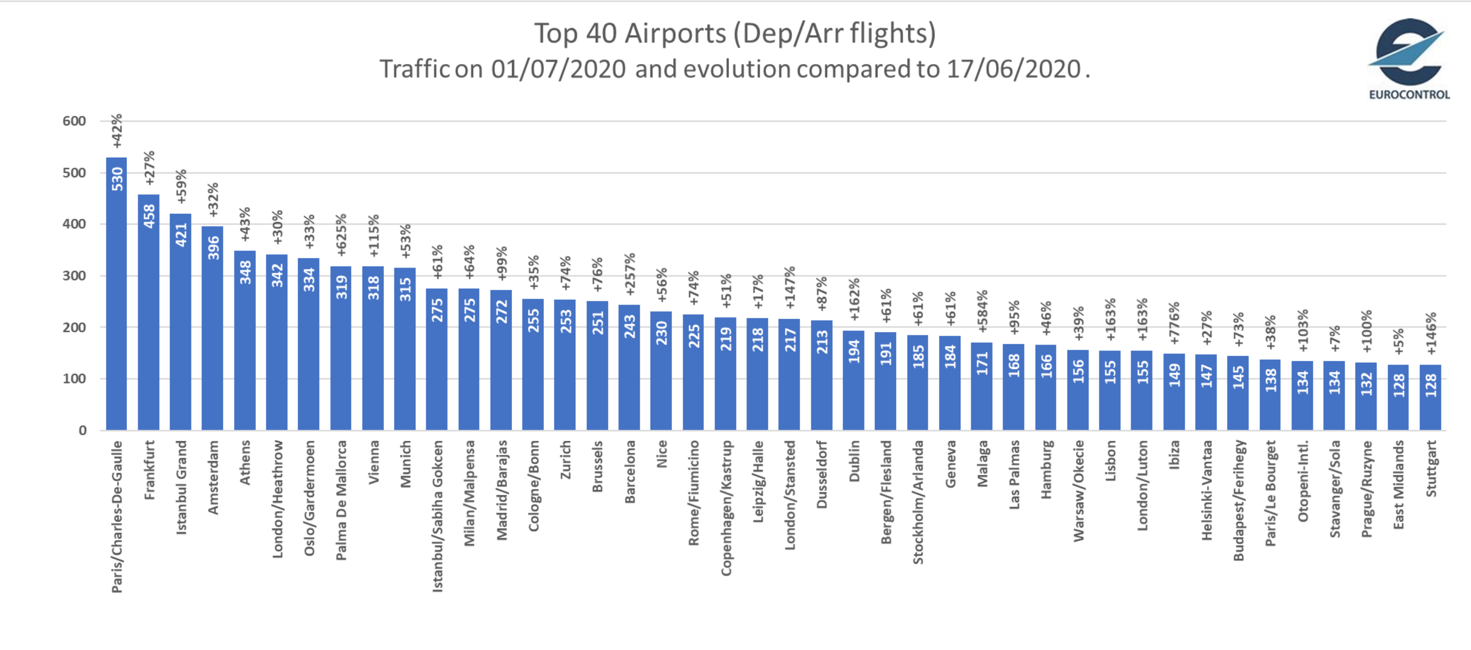
- **China:** Domestic traffic is constantly increasing since mid-April reaching 10,338 flights on 28 June. On the contrary, international flights are flat over the same period (with 1,208) and overflights are still slightly decreasing to 468.
- However, Beijing Capital and Daxing airports have seen a significant and quick drop of traffic due to the local COVID-19 outbreak with decreases of some 76% (resp. -81%) in just a few days.



- **Examples of worldwide airlines:**
  - **United Airlines** continuing with voluntary exit programme, closing HK Tokyo & Frankfurt cabin crew bases and terminating some codeshares; planning to restart some international routes to Asia during July.
  - **Delta Air Lines** planning to add nearly 1,000 flights to its network in 2020 but its schedule will be approximately 65% smaller (compared to 2019) – 60% down in domestic and nearly 85% down in international.
  - **American Airlines** expanding codeshare with Qatar Airways, planning to book services to capacity, mandating masks.
  - **Emirates** expanding network to 52 destinations in July, including (most recently) resuming routes to Cairo, Tunis, Glasgow and Malé. Some destinations, such as Heathrow and Paris, may be serviced by A380s.
  - **Qatar Airways** expanding codeshare with American Airlines, resuming several European and US routes. However, also laying off some pilots, reducing salaries and deferring aircraft purchases.
  - **Etihad** scheduling 20 Asian services in July, 19 European, 3 American and 8 Middle Eastern/African. It is also extending salary cuts until September and laying off more staff.
  - **Singapore Airlines** operating a number of routes to Europe in July – to Amsterdam, Barcelona, Copenhagen, Frankfurt, Heathrow & Zurich. In May it handled 9,600 passengers, down 99.7%.
  - **Qantas** expecting international borders to be closed for a 'long time'. Expecting domestic operations to be back to 70% in the next financial year. Extensive job losses.
  - **ANA** reducing domestic frequencies by 50% in July; to announce company-wide reform plan in July; planning some operations to Heathrow/Frankfurt in July.

4. Airport Information

- Paris/CDG was the busiest airport with 530 dep/arr flights on 1st July. Here again, significant increase on 1st July for many airports but particularly for southern airports like Palma de Mallorca (+625%), Barcelona (+257%), Ibiza (+776%), Malaga (+584%).



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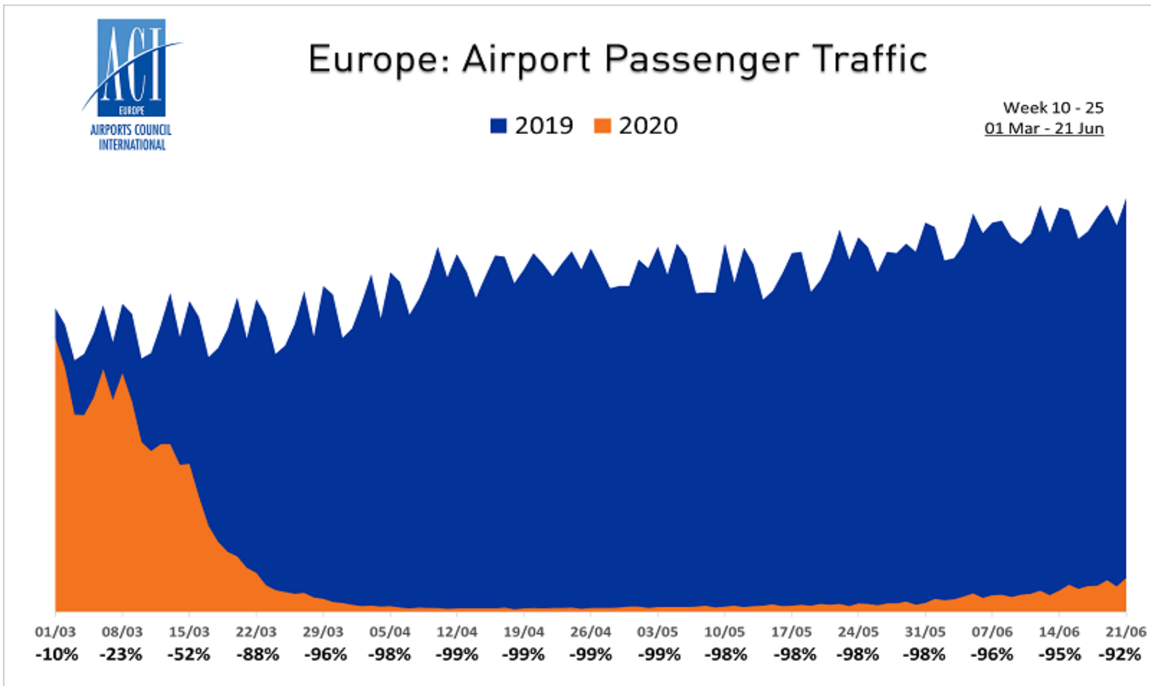
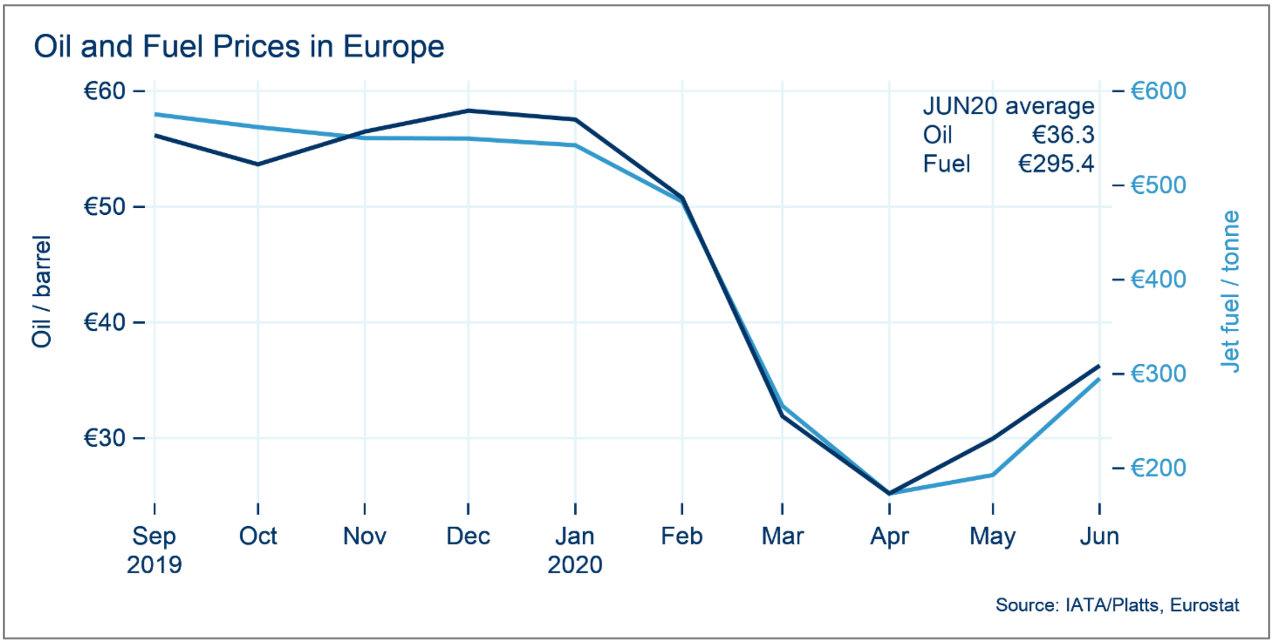


5. Economic

- **Fuel Price:** After having been above 500€ per tonne at the beginning of 2020, the jet fuel has dropped to a minimum of 173€ in April. Since then, accompanying the traffic recovery, the jet fuel price per tonne has constantly increased by 70% to reach 295€ in June.



- **En-route air navigation charges:** The billing of en-route charges went down to 73M€ for the month of April (i.e. -89% compared to plan). It went up to 95M€ for May and it is expected to increase for June, considering the increase of IFR flights.

Route Charges	Mid-Feb. billing	Mid-Mar. billing	Mid-Apr. billing	Mid-May billing	Mid-Jun. billing
Total net chargeable amounts (VAT excl.)	547 M€	516 M€	357 M€	73 M€	95 M€

To further assist you in your analysis, EUROCONTROL provides the following additional information on a daily basis (daily updates at approximately 12:00 CET) and every Friday for the last item:

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.

3. **NOP Recovery Plan:**
   https://www.public.nm.eurocontrol.int/PUBPORTAL/gateway/spec/index.html
   - This report, which is updated every Friday, is a special version of the Network operation Plan supporting aviation response to the COVID-19 Crisis. It is developed by EUROCONTROL NM in cooperation with the operational stakeholders ensuring a rolling outlook.