### Traffic Situation & Airlines Recovery
- 12,331 flights on Tuesday 7 July (up to 55% with +3,035 movements compared to Tuesday 30 June). This is about 35% of 2019 levels.
- Significant increase since 1 July for many airlines, in particular Ryanair with 714 additional flights compared to 2 weeks before (+328%). Most airlines further increased their operations on 7 July, in particular easyjet (+339%), Wizz Air (+906%), Eurowings (+123%), Vueling (+300%), Alitalia (+78%).
- British Airways had only a limited number of flights (103) on 7 July compared to normal operations.
- Expect to reach 50% of 2019 levels in the first weeks of August with 18,000 flights, in line with latest traffic scenarios published by EUROCONTROL on 24 April.
- Significant increase in southern States over the last 2 weeks with +130% for Spain, +63% for Italy, +115% for Greece and +122% for Portugal.
- All-cargo flights stable. Business aviation recovering faster reaching -22% (15% of total flights on 5 July).

### Traffic Flows & Country Pairs
- The major traffic flow is the intra-Europe flow with 10,634 flights on 7 July. Traffic flows have increased over the last 2 weeks. Intra-Europe flights increased by 47% but are still -62% vs 2019.
- Top 8 flows are domestic flows. However, flows to/from southern European countries (Germany-Spain +169%, UK-Spain +180%, Germany-Turkey +83%, Italy-Spain +224%, France-Spain +209%, Netherlands-Spain +300%, Germany-Greece +231%) are showing significant increase over the last 2 weeks.

### Situation outside Europe
- **China:**
  - Domestic traffic is constantly increasing since mid-April reaching 9,193 flights on 6 July.
  - International traffic is stable over the same period (with 1,138) as well as overflights (with 448).
  - Traffic is slightly recovering at Beijing airports since the end of June after the sudden drop mid-June because of COVID-19 outbreak. Traffic is recovering at Wuhan since early April.
- **United States:**
  - Domestic traffic is slightly improving since early May reaching -64% of 2019 in week ending June 28. However, international flows are still very low at some -90% except flows to/from Mexico.
- **Middle East:**
  - International and intra-Middle-East traffic dropped quickly around mid-March from some 3,000 flights a day to 400. Since early April, Intra-Middle-East traffic is recovering reaching 992 flights on 5 July, as well as International traffic (with 888 flights).

### Airport Information
- Paris/CDG was the busiest airport with 546 dep/arr flights on 7 July.
- Significant increase for many airports but particularly for southern airports like Palma de Mallorca (+164%), Barcelona (+105%), Ibiza (+175%), Malaga (+127%).
- 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 843,000 on 28 June (i.e. -90% compared to 2019).

### Economic
- **Jet Fuel price:** was around 200 US cents per gallon early 2020. Dropped to a minimum of 41cst/gal on 24 April. Since then, constant increase reaching 106cst/gal on 3 July with traffic recovery (+ 59%).
- **GDP in the European Union:** GDP dropped by -3.3% in Q1 2020 and should drop again by -11.9% in Q2 and is expected to increase by +8.5% against Q2 in Q3 and then by +2.5% in Q4. Expected to reach the level of Q1 2019 in Q4 2020.
1. Traffic Situation and Airlines Recovery

- 12,331 flights on Tuesday 7 July, (up to 55% with +3,035 movements compared to Tuesday 30 June). This is about 35% of 2019 levels. Significant increase since 1st July for many airlines.

- Steady increase of flights since mid-April (+306%) reaching -64.6% compared to 2019 on a 7-day moving average.
• **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 16500 flights during the second half of July 2020 and may go up to 18000 flights during the first half of August 2020. This would represent during the first weeks of August 2020 up to 50% of the traffic during the similar period in 2019. At the time of writing, major carriers communicated positive updates to their operations. Therefore the traffic outlook may see another leap in the next edition.

![Traffic Outlook Compared to 2019](chart)

• **Ryanair** was by far the airline having the highest number of flights with 932 flights on 7 July. It experienced one of the highest growth over the last 2 weeks with +328% compared to 23 June.

• Almost all airlines increased significantly their operations on 7 July, in particular easyJet (+339%), Wizz Air (+906%), Eurowings (+123%), Vueling (+300%), Alitalia (+78%), TUI Jet (+1150%). British Airways had only a limited number of flights (103) on 7 July compared to normal operations.
Restart plans for key European airlines:

- **Aegean** restoring 5 flights from Athens and 9 flights from Greek islands to European cities by end-July.
- **Aeroflot** planning for a 50% recovery and 30 million passengers in 2020, with the aim of returning to 2019 traffic levels for domestic flights by December 2020, and for international flights by March 2021.
- **airBaltic** intends by August to be flying to 49 destinations from Riga and 10 each from Tallinn and Vilnius.
- **Alitalia** Officially relaunched as a nationalised company on 29 June, with an offer of 20% discount on domestic and European routes it is resuming. In addition to old routes, some new ones have been added from Rome Fiumicino (to Brindisi, Reggio di Calabria, and the islands of Lampedusa and Pantelleria). Alitalia has also resumed Milan Malpensa to Brindisi, as well as from both Milan and Rome to Bari.
- **Austrian Airlines** flights between Vienna and Salzburg will as of 20 July be operated by rail under OS flight numbers, as one of the environmental conditions stipulated in the €150 million government bailout package approved by the EC in July.
- **British Airways** resuming additional short-haul services by the end of July to 20 European countries, some domestic services between London and other UK cities, and selected long-haul routes, mostly in North America, the Caribbean and Japan, but with a reduced frequency.
- **Brussels Airlines** delaying resuming international flights to the US and Africa to August.
- **Croatia Airlines** resuming flights to 4 other European destinations, and adding 5 additional destinations in July.
- **easyJet** intending to restart easyJet holidays as of 1 August, and restoring services at Berlin to resume flying to over 50 destinations in July. Announced plans to close 3 3 bases in UK.
- **El Al**: flight cancellations until further notice linked to labour dispute.
- **HOP!** set to be recapitalised with significant restructuring measures in terms of both workforce and fleet, with over 1,000 jobs set to go over the next three years.
• **Iberia** resuming 21 domestic services and 24 international routes in July, and 5 in August.
• **LOT Polish** plans to operate in July and August to around 70 popular destinations: around 250 international flights/week from Warsaw/Chopin airport complemented by 30/day domestic connections to reach Warsaw/Chopin.
• **Montenegro Airlines** resuming flights to Rome and Paris in July, bringing the number of countries served again to 8.
• **Ryanair** resuming full schedule out of Cyprus, and ramping up ops at Berlin to resume services to over 50 destinations in July. That's 1,000 daily flights in July, 200 airports, 90% of network. Plans 60% scheduled flights from 1 August. UK pilots accept pay cut to save jobs [3 July].
• **SAS** resuming flights from Denmark, Norway and Sweden to 10 European destinations by mid-July.
• **Swiss** 12 new European routes in July from ZRH, 24 from GVA; 11 long-haul routes from ZRH, 17 by October.
• **TAP Air Portugal** receiving €55 million investment from the Portuguese government, increasing its stake from 50% to 72.5% of the company's capital.
• **TUifly** resuming flights from Munich to 27 holiday destinations progressively over the summer starting in early July, and from Hamburg to 7 destinations.
• **Virgin Atlantic** planning on receiving GBP200m in funding from Virgin Group founder Sir Richard Branson, adding to the GBP400 million already supported by shareholders
• **Volotea** opening sixth Italian base in Naples with two A319s operating 9 domestic and 8 international flights; 4 new domestic routes launched from Turin.
• **Wizz Air** resuming flights across its bases. Salzburg offer expanded to 7 destinations by the end of the month; resuming from Hamburg to 9 destinations 3 of them new; resuming from Milan to 5 destinations, rising to 20 in the future; resuming from North Macedonia to 35 destinations. New bases established in Tirana (flying initially to 10 destinations, rising to 25 by year-end) Lviv (flying to 6 destinations) and Larnaca.

• **Overall situation against EUROCONTROL traffic scenarios:** June traffic is in line with the EUROCONTROL traffic scenario of 24 April with -65% compared to July 2019 for the first 7 days of July.
• 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 +130% for Spain, +63% for Italy, +115% for Greece and +122% for Portugal.

• When considering market segments, while all-cargo flights remained stable during the crisis, business aviation is recovering faster reaching -22% (representing 15% of total flights on 5 July).
2. Traffic Flows & Country Pairs

- The major traffic flow is the intra-Europe flow with 10,634 flights on 7 July. Traffic flows have increased over the last 2 weeks. Intra-Europe flights increased by 47% but are still -62% vs 2019.

<table>
<thead>
<tr>
<th>REGION</th>
<th>23-06-2020</th>
<th>07-07-2020</th>
<th>%</th>
<th>vs. 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intra-Europe</td>
<td>7239</td>
<td>10634</td>
<td>+47%</td>
<td>-62%</td>
</tr>
<tr>
<td>Europe&lt;-&gt;Asia/Pacific</td>
<td>315</td>
<td>271</td>
<td>-14%</td>
<td>-66%</td>
</tr>
<tr>
<td>Europe&lt;-&gt;Mid-Atlantic</td>
<td>16</td>
<td>44</td>
<td>+175%</td>
<td>-73%</td>
</tr>
<tr>
<td>Europe&lt;-&gt;Middle-East</td>
<td>254</td>
<td>324</td>
<td>+28%</td>
<td>-80%</td>
</tr>
<tr>
<td>Europe&lt;-&gt;North Atlantic</td>
<td>288</td>
<td>332</td>
<td>+15%</td>
<td>-77%</td>
</tr>
<tr>
<td>Europe&lt;-&gt;North-Africa</td>
<td>98</td>
<td>131</td>
<td>+34%</td>
<td>-88%</td>
</tr>
<tr>
<td>Europe&lt;-&gt;Other Europe</td>
<td>155</td>
<td>169</td>
<td>+9%</td>
<td>-87%</td>
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<tr>
<td>Europe&lt;-&gt;South-Atlantic</td>
<td>18</td>
<td>31</td>
<td>+72%</td>
<td>-85%</td>
</tr>
<tr>
<td>Europe&lt;-&gt;Southern Africa</td>
<td>117</td>
<td>119</td>
<td>+2%</td>
<td>-61%</td>
</tr>
</tbody>
</table>

ECAC = 44 European States.
• 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 +169%, UK-Spain +180%, Germany-Turkey +83%, Italy-Spain +224%, France-Spain +209%, Netherlands-Spain +300%, Germany-Greece +231%) are showing significant increase over the last 2 weeks.

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 -64% of 2019 in week ending June 28. 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 9,193 flights on 6 July. On the contrary, international flights are stable over the same period (with 1,138) as well as overflights (with 448). After the significant and quick drop of traffic mid-June due to the local COVID-19 outbreak at Beijing Capital and Daxing airports which saw a decrease of 76% (resp. -81%), traffic is slightly recovering since the end of June. At Wuhan airport, traffic is recovering since early April.

![](image1.png)

• **Middle East:** International and intra-Middle-East traffic dropped quickly around mid-March from some 3,000 flights a day to 400. Since the beginning of April, Intra-Middle-East traffic is recovering reaching 992 flights on 5 July, as well as International traffic (with 888 flights).

![](image2.png)
Restart plans for key worldwide airlines:

- **Air Canada** restoring flights or adding additional flights later in July to Amsterdam, Athens, Brussels, Dublin, Geneva, Istanbul, London, Munich, Rome and Zurich, with daily cargo volumes at 60-80% of normal.
- **American Airlines** adjusting its long-haul international schedule for winter 2020 through summer 2021, in the assumption that S2021 long-haul international capacity will be down 25%. As part of this, three trans-Atlantic routes from Charlotte and Philadelphia will be axed, but Heathrow flights are expected to be fully restored. Operations expected to return to 55% in July.
- **Delta Air Lines** focusing on adding connectivity via its north American hubs, with more capacity to be added on transcontinental services for business travellers. Seat capacity continues to be capped.
- **United Airlines** adding 25,000 domestic and international flights to its August schedule, bringing airline ops to 40% of 2019 levels (with 48% of domestic schedules returning), and triple that of June. More flights planned to Brussels, Frankfurt, London, Munich, Paris and Zurich.
- **Cathay Pacific** expecting growth to remain stagnant, with 90% of staff taking unpaid leave in 2H2020 as part of a second round of its special leave scheme.
- **China Southern** increasing freighter utilisation with over 3,000 cargo services with pax aircraft since the start of the year. Widebody capacity is also set to be redeployed from international routes to high-frequency domestic ones. Traffic back to 70% in July and passenger traffic expected to return to 76% of 2019 levels in 3Q2020, with a 79% load factor. However, lease and tax deferrals on 225 aircraft will see 2020 infrastructure investment reduced.
- **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.
- **Emirates SkyCargo** expanding cargo ops to cover 100 destinations in July, with new flights to Athens, Glasgow, Larnaca and Rome.
- **Japan Airlines** aiming at recovering 80% of domestic flights by August and near 100% by October, following the lifting of domestic travel restrictions in June – but its international flight offer remains massively reduced.
- **Malaysia Airlines** is gradually resuming UK flights in July, but on a limited basis until August.
- **Qatar Airways** now requiring passengers to wear a face mask and shield when boarding, inflight and disembarking, with additional health features on board. By end-July the airline expects to be operating over 3,500 flights, almost double its June offer. Regular flights have been restored to Belgrade, Berlin, Edinburgh, Larnaca, Prague and Zagreb, with Ankara, Bucharest, Sofia and Venice to return by mid-July.
- **Singapore Airlines** further reducing its A380 fleet, bringing its total in long-term storage in Alice Springs to six. 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.
4. Airport Information

- Paris/CDG was the busiest airport with 546 dep/arr flights on 7 July. Here again, significant increase for many airports but particularly for southern airports like Palma de Mallorca (+164%), Barcelona (+105%), Ibiza (+175%), Malaga (+127%).

- 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 843,000 on 28 June (i.e. -90% compared to 2019).
5. Economic

- **Fuel Price**: After having been at around 200 US cents per gallon at the beginning of 2020, the jet fuel has dropped to a minimum of 41cst/gal on 24 April. Since then, accompanying the traffic recovery, the jet fuel price has constantly increased by 59% to reach 106cst/gal on 3 July.

- **GDP in the European Union**: After a slightly positive evolution of GDP in each quarter of 2019, it dropped from -3.3% in Q1 2020 and should drop again by -11.9% in Q2. GDP is then expected to increase by +8.5% against Q2 in Q3 and then by +2.5% in Q4. GDP is then expected to increase by a little bit more than +1% per quarter in 2021 and reach the level of Q1 2019 in Q4 2020.
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. The billing date for June flights is on Monday 13 July.

<table>
<thead>
<tr>
<th>Route Charges</th>
<th>Mid-Feb. billing</th>
<th>Mid-Mar. billing</th>
<th>Mid-Apr. billing</th>
<th>Mid-May billing</th>
<th>Mid-Jun. billing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total net chargeable amounts</td>
<td>547 M€</td>
<td>516 M€</td>
<td>357 M€</td>
<td>73 M€</td>
<td>95 M€</td>
</tr>
</tbody>
</table>

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.