**Traffic Situation & Airlines Recovery**

- 15,662 flights on Tuesday 4 August (+12% and +1,710 flights compared to Tuesday 21 July) reaching 46% of 2019 levels. Significant flight increases recorded from/to Mediterranean tourist destinations as of the beginning of August: another step change (cf. early July).
- 3 August was peak traffic day since the end of March with 16,877 flights. 1 August was nearing 50% of the 2019 levels.
- Additional capacity is mainly being added by LCCs but traditional carriers have also expanded their offering from/to Southern Europe. The Spain-UK flow does not seem to be impacted by the UK quarantine rules (imposed end July).
- The change in growth rates from one week to another underlines the volatility in airlines’ operations, and shows the challenge they face trying to keep pace especially with changes in travel restrictions (COVID new cases).
- Traffic development in Europe in July was in line with the EUROCONTROL “coordinated” scenario for July.
- New cases in some countries have led to travel restrictions being continued or re-imposed. It is likely that this will lead to ad-hoc cancellations.
- Ryanair remains the busiest carrier with 1,447 flights on 4 August (+50% on 21 July) followed by easyJet (866 flights, +92%), Turkish Airlines (637 flights, +20%), Wizz Air (523 flights, +4%) and Lufthansa (439 flights, +14%).
- All-cargo flights are 4% above 2019 levels. Business Aviation is recovering fast (9% below 2019 levels): a new larger clientele might find private jets more convenient in the current circumstances. Low-cost is 63% below 2019 levels, recovering slightly faster than Traditional (68% below).
- The latest European NOP 2020 Recovery Plan expects traffic to potentially be close to 60% of the 2019 levels on peak days by end August. This outlook is highly dependent on the evolution of State restrictions.

**Traffic Flows & Country Pairs**

- The main traffic flow is the intra-Europe flow with 13,722 flights on 4 August. Traffic flows between Europe and North-Atlantic increased over the last 2 weeks. Russian flow is slowly restarting.
- Domestic flows are still dominating: 8 of the top 10 flows are domestic. Double digit growth for flows from/to and within South Europe. Some domestic decreasing over the last two weeks (eg. France).

**Situation outside Europe**

<table>
<thead>
<tr>
<th>Region</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>US</td>
<td>Domestic traffic is stable on last week, ie 49% below 2019 levels on 19 July.</td>
</tr>
<tr>
<td></td>
<td>International flows remain very low at some -79% except flows to/from Mexico.</td>
</tr>
<tr>
<td>Asia/Pacific</td>
<td>Chinese domestic flights started to increase again in June after the resurgence in cases, reaching 11,853 flights on 2 August, now only 15% below pre-COVID levels.</td>
</tr>
<tr>
<td></td>
<td>Even if the volume of international flights in China is less important than the domestic one, the international traffic remained at 70% below pre-COVID levels since early March.</td>
</tr>
<tr>
<td></td>
<td>Thai Airways extended international services suspension until October.</td>
</tr>
<tr>
<td>Mid-East</td>
<td>Both international and domestic flights are smoothly recovering in the Middle-East area, with some continued signs of flattening.</td>
</tr>
<tr>
<td></td>
<td>Kuwait announced it is banning entry of travellers from 31 ‘high-risk’ countries.</td>
</tr>
</tbody>
</table>

**Airport Information**

- Amsterdam was the busiest airport with 723 flights (departures & arrivals) on 4 August, followed by Paris CDG and Frankfurt. Madrid and Athens complements the top 5 airports.
- The number of passengers at European ACI airports is still very low at -75% during week 30 vs 2019 levels.
1. Traffic Situation and Airlines Recovery

- 15,662 flights on Tuesday 4 August, (+12% with +1,710 flights compared to Tuesday 21 July). This is 46% of 2019 traffic levels. Based on a 7-day moving average, the decrease is 54% compared to 2019. There was a significant step change on 1st July for many airlines. During the second half of July, we observed slower growth than during the first half. The first days of August saw solid numbers with peak day on 3 August (16,877 flights), which might be another (smaller) step change, and traffic is beginning to approach 50% of 2019 traffic (1 August was 49.3%). LCCs made an attempt to kick-start the Network. We are seeing some volatility in growth rates from one week to another perhaps as a result of the fluctuating situation with regards to restrictions.
NOP Recovery Plan (dated 31 July):

- There is a potential for significant growth of traffic at the beginning of August - up to 20,000 flights, followed by a limited gradual increase of traffic - up to 21,000 flights in the first half of September. As from the second half of August, the latest NOP Recovery Plan sees traffic on peak days likely to be close to 60% of the traffic of 2019. A significant increase is noted for all parts of the European network with some areas reaching up to 70% of the 2019 traffic. The traffic outlook was impacted to a certain extent by new restrictions being added over the past weeks, and remains highly dependent on the evolution of state restrictions.

- Ryanair was, by far, the airline with the highest number of flights with 1,447 flights on Tuesday 4 August. This corresponds to a 50% increase on Tuesday 21 July. easyJet, the 2nd busiest operator with 866 flights on 3rd August, almost doubled its capacity (on Tuesday 21 July). Both airlines followed the same logic and have largely expanded their flows from/to Spain and Italy but also Portugal and Greece.

- Low-cost carriers made an attempt to kick start the Network, especially Vueling (+43%), Pegasus (+54%), Volotea (+64%). The exception being Wizzair (+4%) which, although the 4th busiest carrier in Europe, opted to maintain the current flight situation.

- The busiest traditional carriers have increased their capacities as well: TAP (+78%), KLM (+76%), Iberia (+43%), Alitalia (+24%). Air France, Lufthansa and British Airways posted more limited but still double-digit increases (resp. 10%, 14% and 15%) whereas SAS did not really change its number of flights (+1%) when compared to two weeks ago.
• Airlines adding the highest number of flights, when comparing Tuesday 4 August with the same day two weeks ago, were: Ryanair (adding 481 flights) followed by easyJet (+414 flights), KLM (+172 flights), Pegasus (+114 flights) and Turkish Airlines (+108 flights).

• News from key European airlines and airports:
  o **airBaltic** launching Riga-Thessaloniki service early September and Riga-Athens service from 6 August.
  o **Air France** replacing A380s with Boeing 777s on a number of routes from late October.
  o **Air France KLM** reports an operating loss for H1 2020 of €2.4 billion; it is reducing its expected capex for 2020 from the original figure of €3.6 B to €2.1 B.
  o **Air Moldova** announced suspension of Nice and Thessaloniki services until 2021.
  o **Alitalia** resuming services to Dusseldorf, Paris Orly and Delhi in October.
  o **Austrian Airlines** have added 14 short/medium haul routes and its service to Chicago.
  o **British Airways** delaying short haul service resumption from London Gatwick to November; announced resumption of 17 destinations (short and long-haul) throughout August.
  o **Croatia Airlines** planning to operate to 37 destinations in August.
  o **Eurowings** to resume Dresden-Cologne service as of September.
  o **IAG** report EUR1.4bn operating loss in Q2 2020; traffic down 98.4%; passenger capacity down 95.3%
  o **Iberia** reported passengers down 98.1% year-on-year for the period April-June 2020.
  o **KLM** to cut FTEs by 15% as a condition of €3.4 billion stabilisation package; restarts Amsterdam-Dresden flights.
  o **Lot** have announced resumption of Warsaw-Minsk service.
  o **Lufthansa** is maintaining suspension of Frankfurt – Leipzig service originally suspended in March; restarting Munich-Tibilisi service.
  o **Ryanair** launched Vienna-Gdansk route; resumed Frankfurt-Rijeka service.
- **TAP Air Portugal** reducing working hours for all personnel by between 20 and 70%, resuming twice daily Lisbon-Munich service; resuming Lisbon-Belo Horizonte service.

- **Turkish Airlines** announced plans to operate to 197 destinations in August 2020; to resume flights Istanbul – Kharkiv.

- **Wizz Air** operating loss for 3 months ended 30 June was €106 M; passengers 93% down; has launched new routes and new bases in Albania, Cyprus, Italy, Ukraine, Germany, Romania and Russia; took delivery of a new A321neo.

- **Virgin Atlantic**, based in London and operating exclusively long-haul international routes, filed for Chapter 15 bankruptcy in New York on 3 August, part of a process to protect its assets from US creditors while it is trying to set up a rescue plan in the UK.

- **Edinburgh Airport** to reduce staff by around one third.

- Based on traffic levels, the Top 5 busiest States\(^1\) includes Germany (+8%), UK (+22%), France (+4%), Spain (+20%) and Italy (+25%). Flows between North-West Europe and Southern Europe have densified with the summer period. Most of the states in the Mediterranean area have recorded double-digit increases in flight growth compared to two weeks ago, the exception being Morocco (international flights not restored until 10 August) and Israel (limited international flights until 1\(^{st}\) September).

\(^{1}\) excluding overflights.
- **Overall situation against EUROCONTROL traffic scenarios**: The number of flights in July 2020 (-61% vs July 2019) was in line with the EUROCONTROL traffic scenario of 24 April. The traffic for the 1-4 August 2020 period is 53% below the same period in 2019, slightly below the “Coordinated Measures Scenario”.

![EUROCONTROL Draft Traffic Scenarios](image)

- When considering market segments\(^2\), while all-cargo flights remained stable during the crisis, business aviation is recovering faster being only 9% below 2019 levels (representing 14% of total flights on 27 July). The reason for the quicker recovery of this segment seems to be partly explained by the fact the GA/BA\(^3\) Ops have a completely new clientele, people flying privately for peace of mind and safety.

- Low-cost and traditional flights (~72% of the total) are still lagging behind, respectively 63% and 68% below 2019 traffic levels. But the recent uplift in LCC might change the speed of recovery in the coming week.

![Market segments in EUROCONTROL Network](image)

\(^2\) Data updated until 27 July 
\(^3\) General Aviation/Business Aviation
2. Traffic Flows & Country Pairs

- The major traffic flow is the intra-Europe flow with 13,722 flights on 4 August, which increased by 14% when compared to the number of flights on 21 July. Traffic levels on flows between Europe and North-Atlantic increased by 19% (August step change, see next section) over two weeks but intercontinental traffic levels are still 73% below 2019 levels. Traffic flows between Europe and “Other Europe” recorded a 33% increase within the last two weeks owing to a gradual resumption of flights out from/to Russia with some States since the 1st of August. Traffic levels on flows between Europe and Asia/Pacific decreased by 15% owing to the reduction of the number of daily flights from/to some Chinese airports but the growth rates remain quite volatile from one day to another.

<table>
<thead>
<tr>
<th>REGION</th>
<th>21-07-2020</th>
<th>04-08-2020</th>
<th>%</th>
<th>vs. 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intra-Europe</td>
<td>12,060</td>
<td>13,722</td>
<td>+14%</td>
<td>-48%</td>
</tr>
<tr>
<td>Europe&lt;&gt;Asia/Pacific</td>
<td>285</td>
<td>241</td>
<td>-15%</td>
<td>-70%</td>
</tr>
<tr>
<td>Europe&lt;&gt;Mid-Atlantic</td>
<td>52</td>
<td>50</td>
<td>-4%</td>
<td>-70%</td>
</tr>
<tr>
<td>Europe&lt;&gt;Middle-East</td>
<td>339</td>
<td>319</td>
<td>-6%</td>
<td>-81%</td>
</tr>
<tr>
<td>Europe&lt;&gt;North Atlantic</td>
<td>321</td>
<td>382</td>
<td>+19%</td>
<td>-73%</td>
</tr>
<tr>
<td>Europe&lt;&gt;North-Africa</td>
<td>251</td>
<td>248</td>
<td>-1%</td>
<td>-79%</td>
</tr>
<tr>
<td>Europe&lt;&gt;Other Europe</td>
<td>173</td>
<td>230</td>
<td>+33%</td>
<td>-81%</td>
</tr>
<tr>
<td>Europe&lt;&gt;South-Atlantic</td>
<td>37</td>
<td>37</td>
<td>+0%</td>
<td>-81%</td>
</tr>
<tr>
<td>Europe&lt;&gt;Southern Africa</td>
<td>137</td>
<td>136</td>
<td>-1%</td>
<td>-57%</td>
</tr>
</tbody>
</table>

ECAC = 44 European States.
Domestic flows are still the most active flows (i.e. 8 of the top 10 flows are domestic). Despite UK Government imposing a quarantine on passengers from Spain from the 26th of July, the flows between Spain and the UK recorded a solid 23% increase over the last 2 weeks.

Domestic flows in Southern Europe (Spain, Italy, Turkey, Portugal or Greece) recorded double-digit increases, mainly related to hub-and-spoke connections.
3. Situation outside Europe

- **United-States:** After a significant drop of traffic in the US by the end of March, US domestic traffic has slightly improved since early June with a noticeable step change on 1st July reaching -49% of 2019 in week ending July 26. International flows remain low at -79% except flows to/from Mexico.

- After a significant drop of traffic in the US at all airports at the end of March, a recovery has been recorded for the biggest US airports. Dallas FW and Atlanta have experienced some of the same step change as in Europe from 1st of July. Atlanta and JFK seem to have recorded another small step change early August. But the data are difficult to read due to the drop on 30 July (impact of weather restrictions across the shown airports). These data are based on OpenSky Network ADSB data.
China: The number of domestic flights collapsed from end-January (~14,000 flights) and started recovering since end-February. This smooth recovery has been hindered mid-June as virus resurgence in Beijing areas (see below) led to a drop and then, a stagnation of traffic levels for roughly one month. Very recently, Chinese domestic flights started to increase again, reaching 11,853 flights on 2 August only 15% below pre-COVID levels. The number of international flights remained stable over the same period (with 1,191 flights, i.e. still 70% below pre-COVID levels). The same is true for overflights (540).

Details at airports level in China illustrate the sudden drop of traffic mid-June due to the resurgence of COVID-19 outbreak at Beijing Capital and Daxing airports. Both airports are now back to mid-June levels. The four other airports shown in the graph are increasing slowly to pre-COVID levels.

Domestic Traffic variation at main airports in China
- **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 has been increasing slowly, stabilising around 1,000 flights per day since early July. International traffic has been recovering at the same levels as domestic from early April but is slightly lagging behind (895 flights per day on 2 August). Some travel restrictions are still in place for international flows.

- Traffic at main Middle-East airports has been slowly recovering since mid-April but remains far below the situation before COVID-19. Riyadh and Jeddah showed a strong increase on 1st of June followed by a more limited one on 1st of July. Riyadh is still 60% below pre-COVID levels.
• News and Plans for key worldwide airlines/manufacturers:

Manufacturers

- **Airbus** delivered 196 commercial aircraft in H1 2020, down from 389 in H1 2019.
- **Boeing** delivered 70 commercial aircraft in H1 2020, down from 239 in H1 2019.

Other Europe

- **Aeroflot** passenger numbers in June down 84%; load factor 56% (25 percentage points down).
- **Belavia** announce resumption of Minsk-Vienna service as of start of August.

Middle-East

- **Egyptair** announces suspension of all services to Kuwait.
- **Kuwait** suspended commercial flights from 31 countries on the advice of health authorities. Some of the banned countries include India, Iran, China, Brazil, Lebanon, Spain, Singapore, Egypt and Sri Lanka.

Asia/Pacific and India

- **ANA Holdings** report operating loss of $1.5 billion for the 3 months ended 30 June; it is significantly reducing capital expenditure.
- **Singapore Airlines** report operating loss of US$795 M for the 3 months ended 30 June.
- **SriLankan** announce resumption of flights to 4 European destinations (Frankfurt, Milan Malpensa, London Heathrow, Paris Charles de Gaulle).
- **Thai Airways** announce international services not to restart until October.

America

- **American Airlines** to furlough, lay off more than 1,900 staff at Philadelphia
- **American Airlines** announce suspension of 10 services to Latin America/Caribbean and 72 domestic services.
- **Delta Airlines** resume daily London Heathrow-New York JFK flight as of 3 August.
- **Air Canada** reported passengers down 96.3% year-on-year for the period April-June 2020; workforce reduced by around 20,000 over same period.
- **Aeromexico** increases increasing operations by 20% in August.
4. Airport Information

- Amsterdam is now the busiest airport with 723 dep/arr flights on 4 August, slightly exceeding Paris CDG (688). AMS posted a 40% growth owing to KLM, easyJet, Ryanair and Turkish Airlines, to name a few, which increased their capacities from the Dutch airport (when comparing Tuesday August with Tuesday 21 July). Frankfurt (498) is the 3rd busiest airport.

- Madrid (+22%) and Athens (+21%), main hubs for connecting to/from tourist destination, complete the top 5 busiest airports in Europe.

- London Gatwick posted a 159% increase due to easyJet and Ryanair expansions.

- After having reached an all-time low value of 60,356 passengers at European airports on 18 April (i.e. -99% compared to 2019), the number of passenger has started to increase again. During the second half of July, the number of passenger at ACI airports passed the bar of 2 million and reached 2.43 million on 26 July, still 72% below 2019 levels. For week 30, Europe pax levels are still 75% below 2019 levels. France seemed to be recovering faster (70% below 2019) whereas the number of passengers in UK was 83% below 2019 levels.
5. Economic, other factors

- **Fuel Price**: After having been at around 200 US cents per gallon (cts/gal) at the beginning of 2020, the jet fuel price dropped to a low of 41 cts/gal on 24 April. Since then, together with the traffic recovery, the jet fuel price has been risen again and it remained just above 100 cts/gal in July.

![Jet Fuel Price Europe](image)

- **Fleet mix**: Very recent days in August have seen an increase of the number of narrow body aircraft, passing the bar of 10,000 flights per day. This increase is linked with the expansion of short-haul flights by various airlines. Narrow bodies currently account for 60% of the active fleet.

![Flights by Aircraft Category](image)

- **Service Units (En-route)**: The number of flights currently is growing faster than the number of service units which is due to differences in traffic mix (e.g. no significant long-haul traffic, aircraft operator start resuming flights with smaller aircraft first).
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 provides 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 Network Operations Portal (NOP) under “Latest News” is 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, updated every Friday, is a special version of the Network operation Plan supporting aviation response to the COVID-19 Crisis. It is developed in cooperation with the operational stakeholders ensuring a rolling outlook.