

Wednesday, 12 August 2020

### Traffic Situation & Airlines Recovery

- 15,660 flights on Tuesday 11 August (+11% and +1,561 flights compared to Tuesday 28 July) reaching 45% of 2019 levels. Noticeable schedules increases recorded on holiday destinations as of the beginning of August. Traffic growth rates are however less important week on week.
- Friday 7 August was peak traffic day since the end of March with 18,147 flights, 50.6% of the 2019 levels.
- With the Summer period, Mediterranean destinations (Spain, Italy, Greece and Turkey) record solid growth rates as they continue to attract tourists.
- On average, Load Factors (LF) for main European airlines in July are far below July 2019 levels ; however, LF can reach last year's levels on holiday destinations (eg 90% reported by Austrian Airlines).
- 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.
- Traffic development in Europe in August so far is (-52%) in line with the EUROCONTROL "coordinated" scenario.
- Ryanair remains the busiest carrier with 1,473 flights on 11 August (+53% on 28 July) followed by easyJet (885 flights, +62%), Turkish Airlines (608 flights, +3%), Wizz Air (521 flights, +19%) and Lufthansa (436 flights, +12%). KLM recorded the biggest growth (+80%) increasing capacities all over Europe.
- Business Aviation has reached 2% above 2019 levels (on 8 August) thanks to the record interest from customers completely new to travel by private jet. All-cargo stable at 5% above last year's levels. Low-cost, still 51% below 2019 levels, is recovering slightly faster than Traditional (63% below).
- The latest European NOP 2020 Recovery Plan expects traffic to be, potentially, close to 60% of the 2019 levels on peak days by September. This outlook is highly dependent on the evolution of State restrictions. As a result of some increases in new cases, some State restrictions have been imposed/re-instated.

### Traffic Flows & Country Pairs

- The main traffic flow is the intra-Europe flow with 13,468 flights on 11 August. Traffic flows between Europe and Russia Federation drastically increased over the last 2 weeks.
- Domestic flows are still dominating: 8 of the top 10 flows are domestic. Spain-UK and Spain-Germany remain the busiest inter-European flows.

### Situation outside Europe

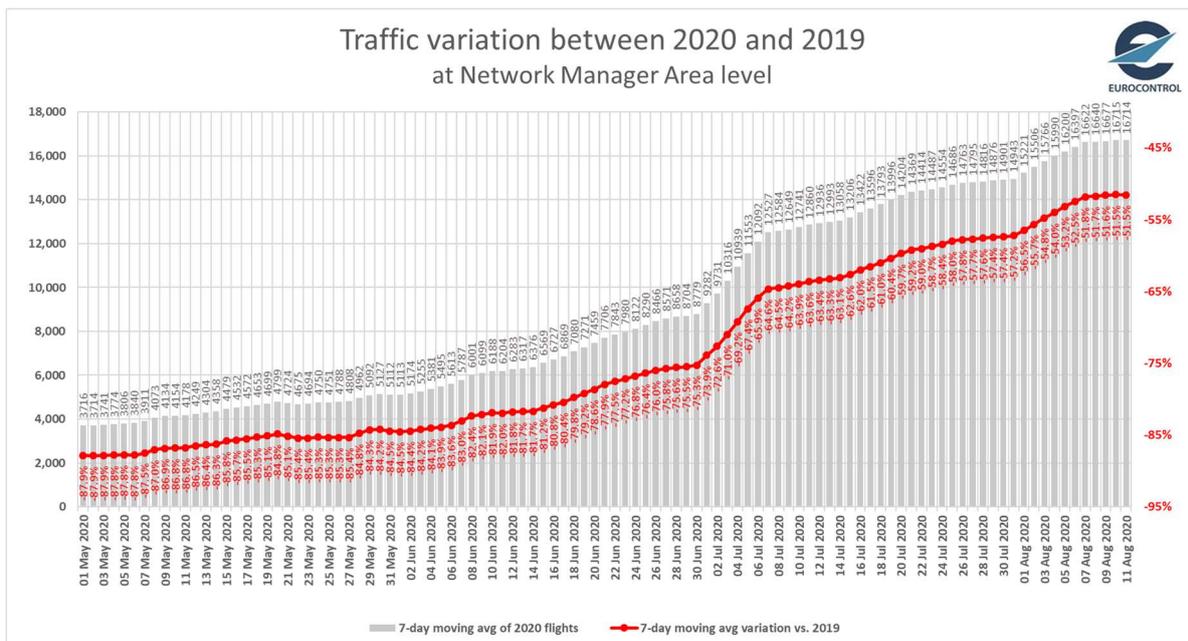
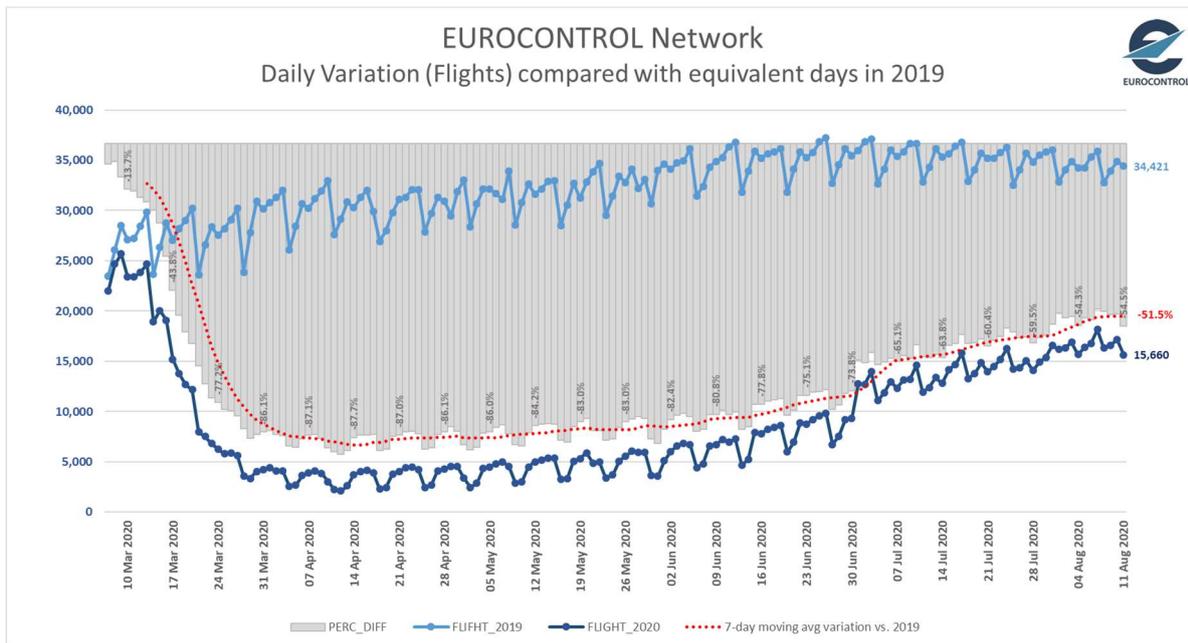
US	<ul style="list-style-type: none"> <li>• Domestic traffic is stable on last week, ie 49% below 2019 levels on week ending on 2 August.</li> <li>• International flows remain very low at some -80%, except flows to/from Mexico.</li> </ul>
Asia/Pacific	<ul style="list-style-type: none"> <li>• Chinese domestic flights, while affected by Hagupit Typhoon early August, are now 13% below pre-COVID levels, reaching 12,168 flights on 9 August.</li> <li>• Even if the volume of international flights in China is less important than the domestic one, the international traffic is giving no indication of recovering since early-March (70% below pre-COVID levels).</li> </ul>
Mid-East	<ul style="list-style-type: none"> <li>• Both international and domestic flights are smoothly recovering in the Middle-East area, with some continued signs of flattening.</li> </ul>

### Airport Information

- Amsterdam was the busiest airport with 711 flights (departures & arrivals) on 11 August, followed by Paris CDG and Frankfurt. Madrid and Athens complement the top 5 airports.
- In July, passenger traffic across the ACI European airports declined by 78% (vs same month in 2019). The recovery at airports (passenger) is slower than what was initially expected by the association.

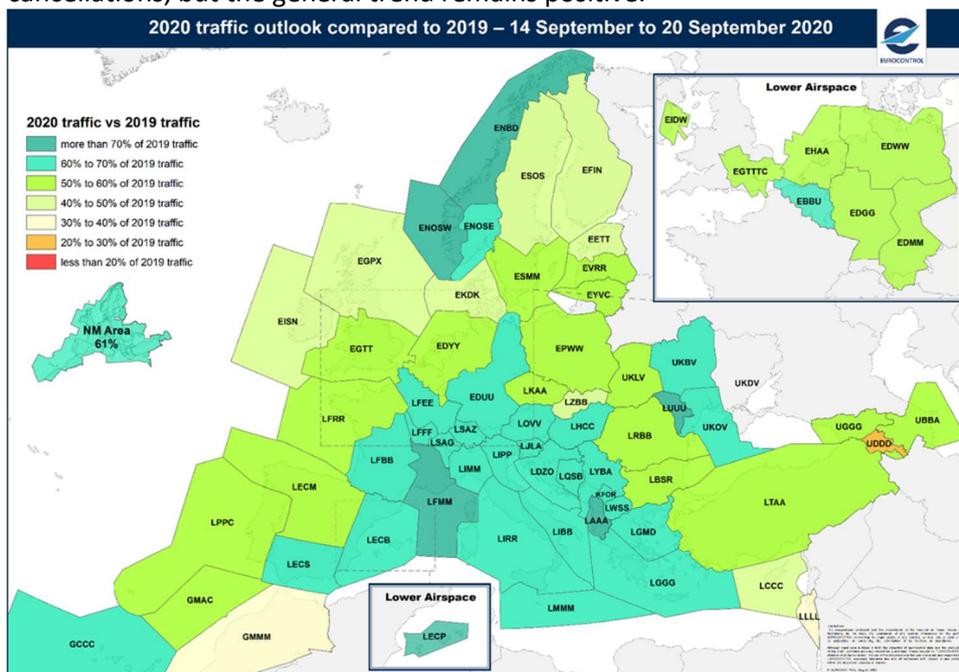
### 1. Traffic Situation and Airlines Recovery

- 15,660 flights on Tuesday 11 August, (+11% with +1,561 flights compared to Tuesday 28 July). This is 45% of 2019 traffic levels. Based on a 7-day moving average, the decrease is 54.5% compared to 2019. There was a significant step change on 1<sup>st</sup> July for many airlines. The first days of August showed a step change too but much more limited. Friday 7 August was a peak day (18,147 flights), and traffic levels reached above 50% of 2019 levels for the first time since mid-March.
- LCCs have been adding most of the capacity to the Network over the first week of August, attempting to kick-start the Network.
- Capacity expansions were noticeable comparing early August to end July but the number of movements is now increasing less on a week-on-week basis.

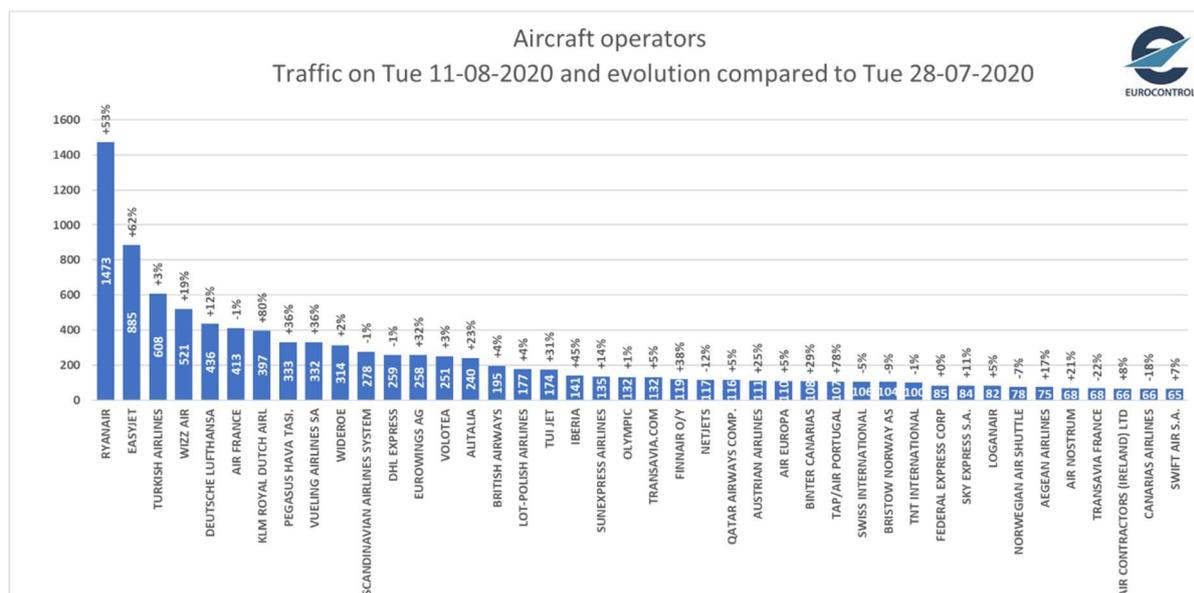


### NOP Recovery Plan (dated 7 August):

- Traffic is expected reach up to 20,500 flights for some peak days in August, and may go up to 22,500 flights on some peak days in September 2020. Until 20 September, the traffic would gradually reach, on peak days, up to 60-65% of the 2019 levels. For September another increase step is expected, higher than in the outlook of last week following recent airline schedule updates. This traffic outlook is highly dependent on the evolution of State restrictions - the latest changes are not fully reflected in the airline schedules and airport slots and might lead to ad-hoc cancellations, but the general trend remains positive.



- Ryanair was, by far, the airline with the highest number of flights with 1,473 flights on Tuesday 11 August. This corresponds to a 53% increase on Tuesday 28 July. easyJet, the 2<sup>nd</sup> busiest operator with 885 flights on 12<sup>th</sup> August, increased its capacity by 62% (on Tuesday 28 July). Like last week, both airlines continued to expand their flows from/to Spain and Italy but also Portugal and Greece. EasyJet restarted flights from/to Turkey too.
- Other Low-cost carriers expanded too but, to a lesser extent, especially Pegasus (+36%), Vueling (+36%), Eurowings (+32%), Wizzair (+19%). Traffic levels for Volotea and Wideroe remained stable (+3% and +2% respectively) over the last two weeks.
- Compared to two weeks ago, KLM is the traditional carriers which has most increased its capacities (+176 flights, +80%). Lufthansa has increased by 12% adding 45 flights. Turkish Airlines remained pretty stable (+3%, adding 20 flights) while Air France and SAS marginally reduced (-1% each).
- Airlines adding the highest number of flights, when comparing Tuesday 11 August with the same day two weeks ago, were: Ryanair (adding 508 flights) followed by easyJet (+340 flights), KLM (+176 flights), Pegasus (+88 flights) and Vueling (+87 flights).



### News from key European airlines:

- **A few passenger airlines reported Load Factors (LF) for July 2020:**

- **easyJet**<sup>1</sup>: 84%, **Ryanair**<sup>1</sup>: 72%, **Icelandair**: +70% (international flights) and 78% (regional flights), **Wizzair**: 60.5%, **SAS**: +51%, **Finnair**: +41.4%.
- **Austrian Airlines** reported that holiday destinations (eg. Athens, Larnaca and Thessaloniki) are well booked with LF ~90% whereas aircraft flying to Germany and Switzerland show LF between 60% and 70%.

- **Other news:**

#### Reduction:

- **Aegean Airlines** discontinues routes Athens to Skopje, Podgorica and Split.
- **Aer Lingus** to close Miami route from winter schedule; to deploy A321neos on 4 additional North American routes as of 03/2021.
- **British Airways** to reduce frequency on 13 North America routes in the winter schedule; publishes plans for winter 2020/21 schedule
- **Norwegian** reported a 90% drop in passenger numbers in July 2020 compared to July 2019.
- **Ukraine International Airlines** suspended 10 services to European destinations due to limitations on entry to the Schengen zone for Ukrainian nationals.

#### Expansion:

- **airBaltic** to resume Riga-Tbilisi and Riga-Stuttgart service; re-hired 17 of the 700 laid-off employees.
- **Air France** resumes Paris-Tbilisi service ; to resume Paris CDG – Beijing service 3 times a week from mid-August.
- **Air Serbia** resumes charter flights to Egypt; operating 40 scheduled services in August; launches codeshare agreement with Turkish Airlines for Belgrade-Istanbul with other routes to come.
- **Austrian Airlines** plans to operate 61 routes from Vienna in August.
- **EasyJet** to operate Sharm El-Sheikh and Hurghada charter service from LGW and Manchester from September.

<sup>1</sup> Load Factor calculated on seats sold.

# COVID19 Impact on European Air Traffic

## EUROCONTROL Comprehensive Assessment



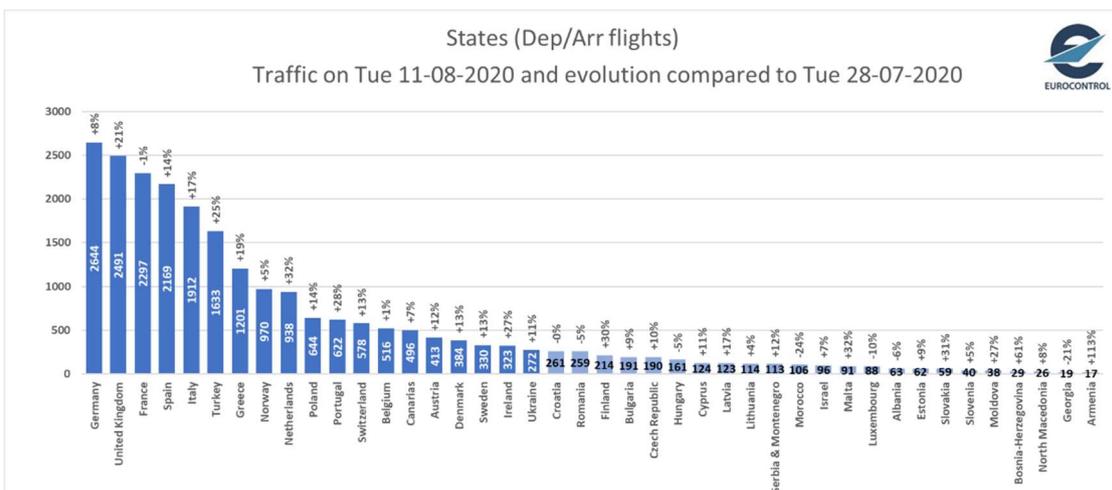
- **Edelweiss Air** announces 16 intercontinental routes from Zurich for the August-October period.
- **Eurowings** announces resumption of multiple services from Dusseldorf, Berlin, Cologne, Stuttgart airports in August and September.
- **Iberia** plans services to 55 destinations in Europe in August, 27% of pre-COVID19 schedule.
- **LOT** plans to increase frequency of Warsaw-Milan service to 10/week as of September; resuming Vilnius-London flights end of August.
- **Lufthansa** added one A320neo to its fleet, taking the total to 24; resumes Munich-Birmingham route; temporarily grounds all A340-600 fleet; to resume 4 flights to India from mid-August.
- **Montenegro Airlines** reports passenger numbers down 90% in July; resumes services to 10 destinations.
- **Ryanair** passenger numbers were down 70% in July 2020 on 2019. Launches Vienna-Brindisi service.
- **Ukraine International Airlines** announces resumption of Kyiv-Amsterdam service.
- **Volotea** launches 4 new routes from Lyon to Canary Islands from October.
- **Wizz Air** July figures show passengers down 53% on 2019 ; announces launch of Budapest-Mykonos and Dortmund-Mykonos service; postpones launch of 9 services from Budapest to summer 2021.

### Financial reports/aid:

- **Croatia Airlines** recorded a loss of €8M in Q2 2020.
- **Lufthansa Group** in Q2 2020, writes down of €300M on aircraft and right of use assets for 65 aircraft that are not planned to resume operations; announces revenue fall for first 6 months of 2020 of 52% to €8.3 billion.
- **Royal Air Maroc** to receive \$650.2M in financial aid from the Moroccan government.

### Manufacturers:

- **Airbus** reported 4 new orders and 49 deliveries in July.
- Based on traffic levels, the Top 5 busiest States<sup>2</sup> is unchanged from one week to another and includes Germany (+8%), UK (+21%), France (-1%), Spain (+14%) and Italy (+17%). Flows between North-West Europe and Southern Europe have densified with the summer period. Turkey (+25%), Greece (+19%) and Portugal (+28%) have recorded double-digit increases in flight growth compared to two weeks ago.



<sup>2</sup> excluding overflights.

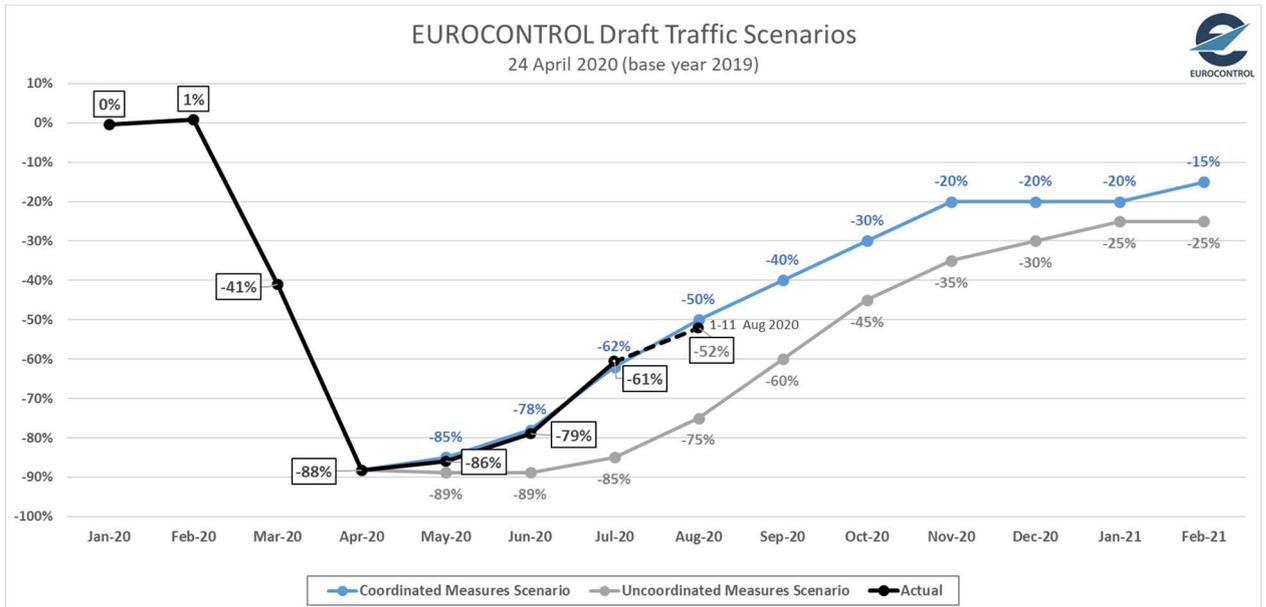


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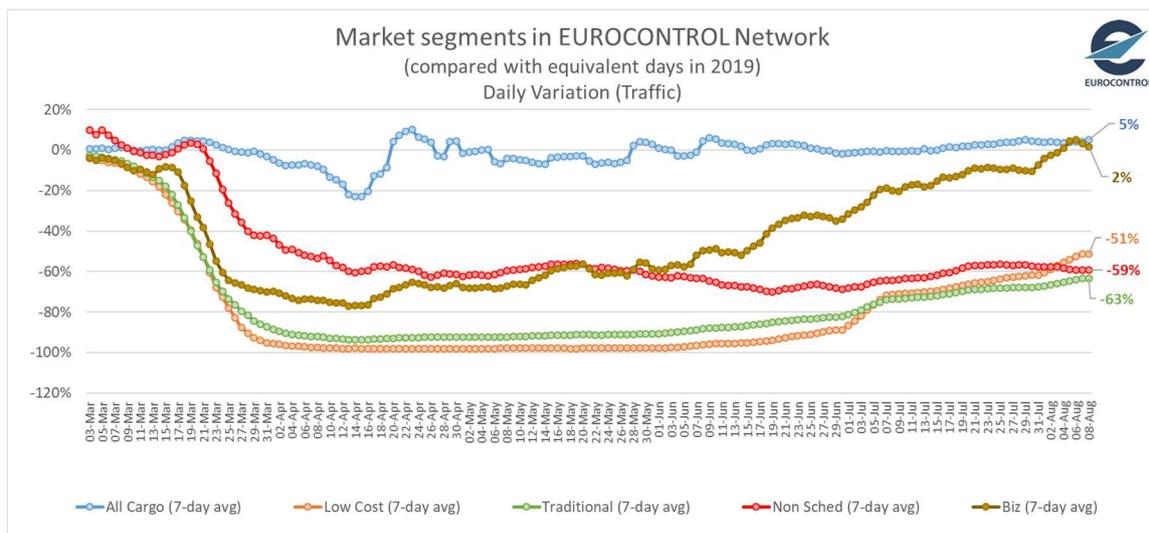
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- Overall situation against EUROCONTROL traffic scenarios:** The number of flights for the first 10 days of August 2020 was 52% below 2019 levels and is in line with the EUROCONTROL traffic scenario of 24 April. ("Coordinated Measures Scenario").



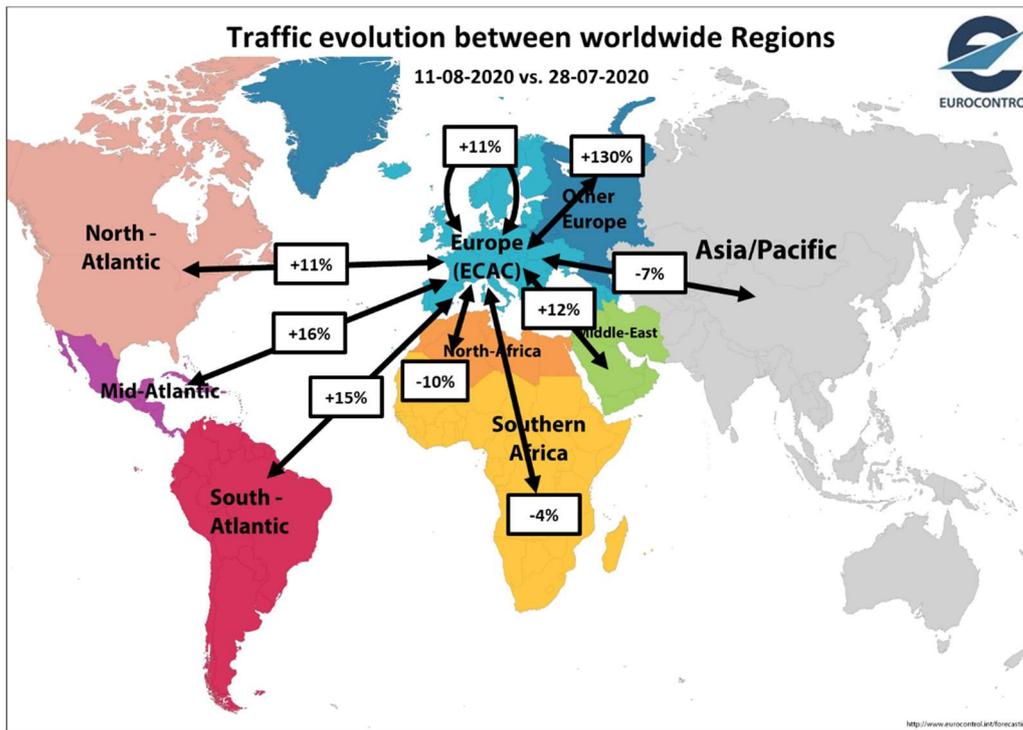
- When considering market segments, the Business Aviation flights are now slightly about the 2019 levels. This recovery is specific to the fact that, since the restart, the BizAv operators have been attracting a new clientele, ready to pay a little bit more to fly from less crowded airports and less busy aircraft in order to minimise health risk concerns. All-cargo flights remained quite stable during the crisis and are now 5% above the 2019 levels (on 8 August).
- Low-cost recorded a faster recovery (-51% vs 2019) than the other two segments (Traditional: -63% and Charter: -59%) over last week as, as explained previously, LCCs made an attempt to kick-off the restart with adding capacities early August.



### 2. Traffic Flows & Country Pairs

- The major traffic flow is the intra-Europe flow with 13,468 flights on 11 August, which increased by 11% when compared to the number of flights on 28 July.
- Traffic flows between Europe and “Other Europe” (mainly Russian Federation) recorded a 130% increase within the last two weeks owing to a significant resumption of flights between Turkey and Russia. The flows between Europe and North-Atlantic and Europe and Other Europe have the same traffic levels and are the two main partners with Europe.

REGION	28-07-2020	11-08-2020	%	vs. 2019
Intra-Europe	12,175	13,468	+11%	-49%
Europe<->Asia/Pacific	274	256	-7%	-68%
Europe<->Mid-Atlantic	44	51	+16%	-68%
Europe<->Middle-East	308	344	+12%	-80%
Europe<->North Atlantic	352	391	+11%	-72%
Europe<->North-Africa	277	248	-10%	-79%
Europe<->Other Europe	168	386	+130%	-69%
Europe<->South-Atlantic	33	38	+15%	-81%
Europe<->Southern Africa	146	140	-4%	-55%



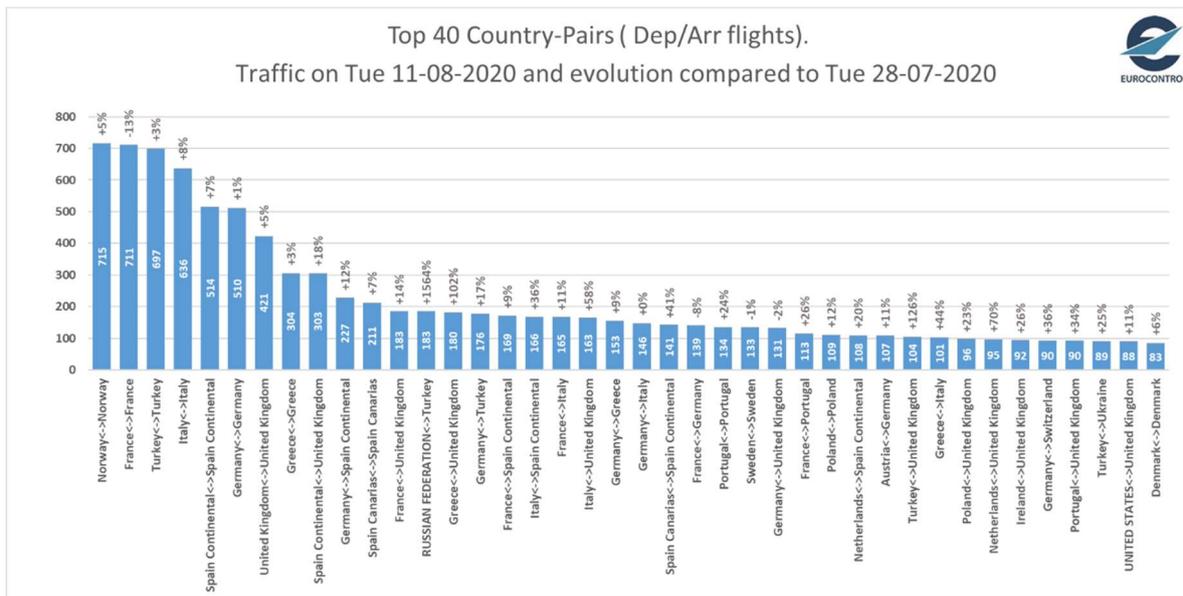
ECAC = 44 European States.

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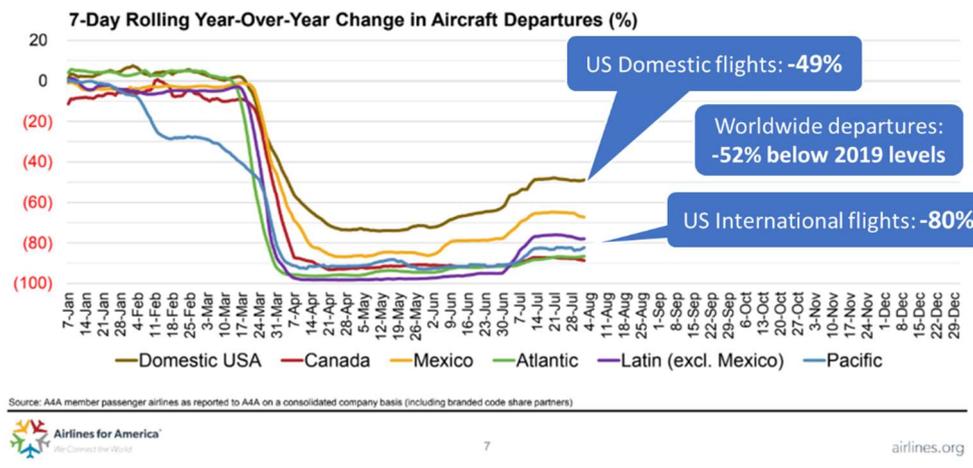
- Domestic flows are still the most active flows (i.e. 8 of the top 10 flows are domestic). The flows between UK and Spain (+18%) is one of the busiest non domestic flows and continue to increase thanks to Ryanair and easyJet expanding (compared to 2 weeks ago).
- Some domestic flows in Southern Europe (Spain, Italy, Turkey and Portugal) recorded double-digit increases, mainly related to hub-and-spoke connections.
- As noted previously, flow between Russian Federation and Turkey jumped from 11 flights (28 July) to 183 flights (11 August), owing to the restart of the Russian flows.



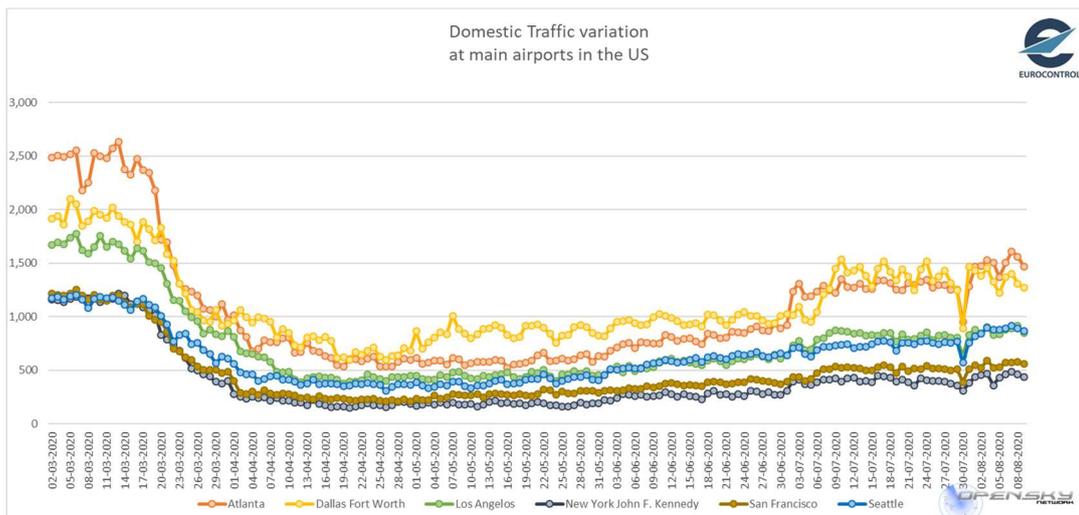
### 3. Situation outside Europe

- 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 1<sup>st</sup> July. The flow remained on a plateau at -49% of 2019 for July. International flows remained low at -80% except flows to/from Mexico (-68%).

**For U.S. Passenger Airlines, Worldwide Departures Remain 52 Percent Below 2019 Levels**  
 In Week Ending August 2 – Domestic Flights Down 49 Percent, International Flights Down 80 Percent



- 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 1<sup>st</sup> of July. Very slow increase since then for these airports, except maybe for Atlanta which recorded a 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.



# COVID19 Impact on European Air Traffic

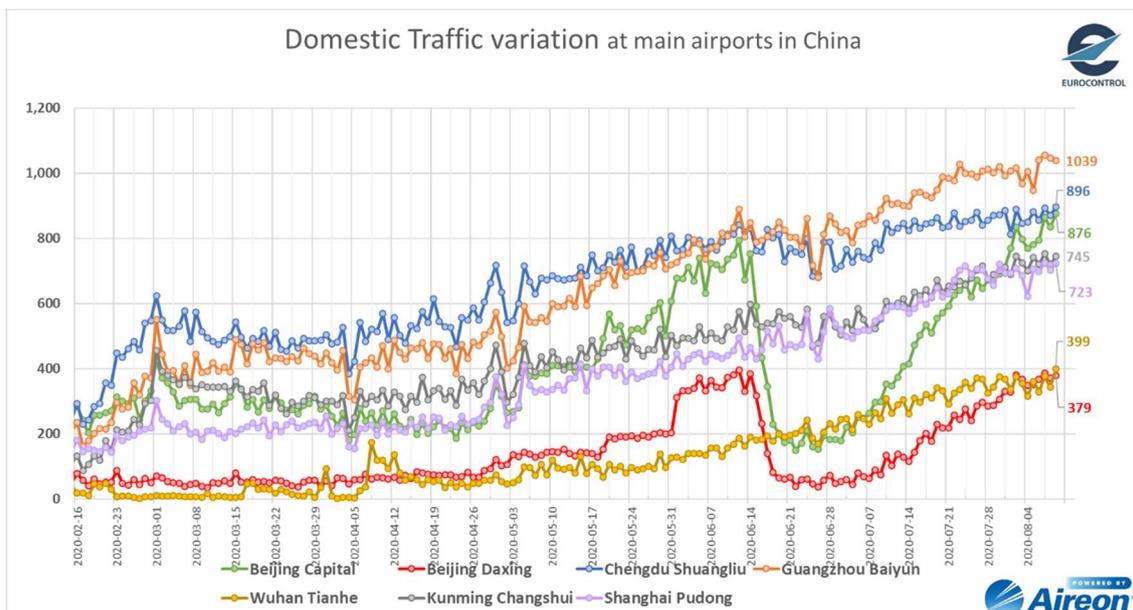
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- China:** The number of domestic flights collapsed from end-January (~14,000 flights) and started recovering since end-February. This smooth recovery has been hindered mid-June as virus resurgence in Beijing areas (see below) led to a drop and then, a stagnation of traffic levels for roughly one month. Very recently, Chinese domestic flights started to increase again, reaching 12,168 flights on 9 August only 13% below pre-COVID levels. Domestic traffic was slightly affected early August with the effect of Typhoon Hagupit, hitting the Eastern coast. The number of International flights remained stable over the same period (with 1,201 flights, i.e. still 70% below pre-COVID levels). The same is true for overflights (546).



- 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 five other airports shown in the graph are slowly increasing to pre-COVID levels. Shanghai Pudong was the airport the most affected by the Typhoon.

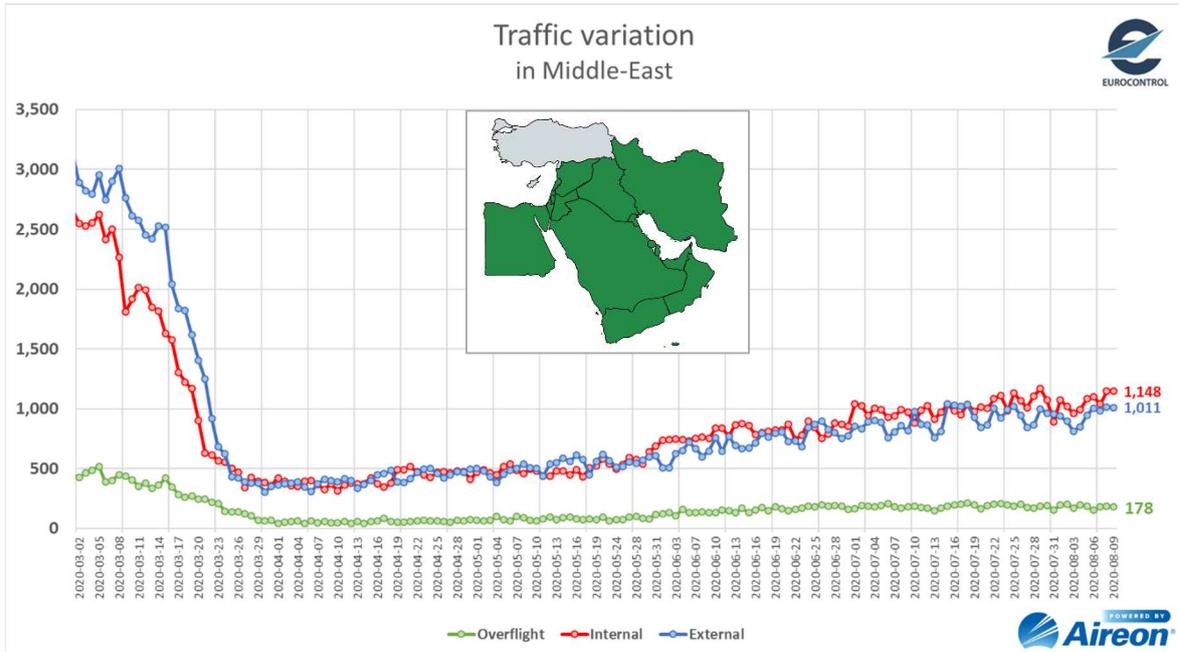


# COVID19 Impact on European Air Traffic

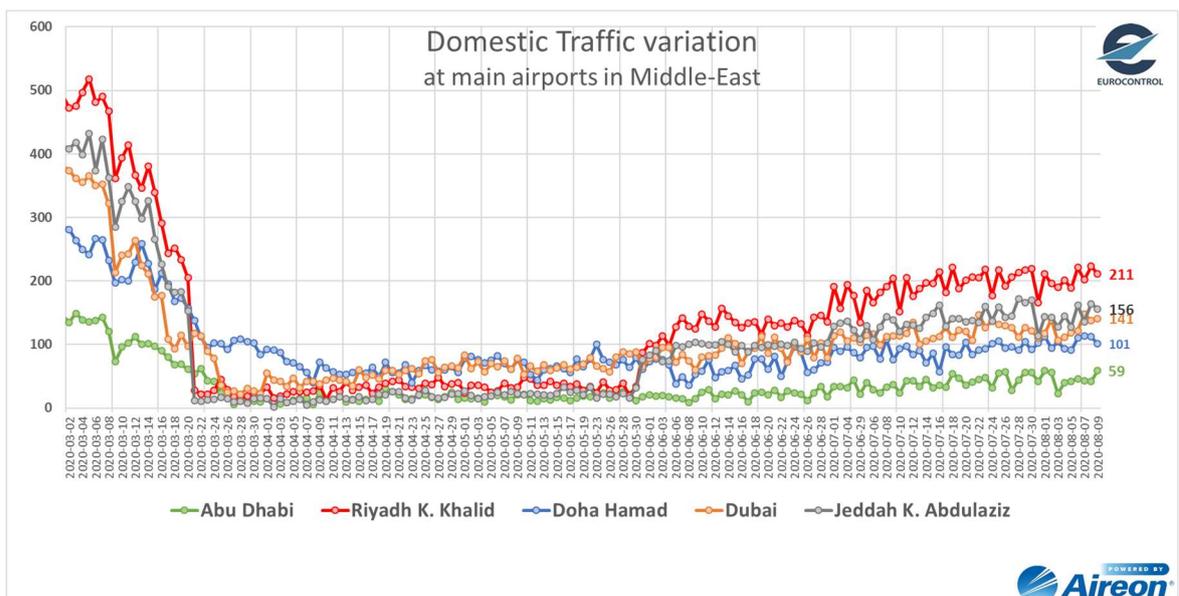
## EUROCONTROL Comprehensive Assessment



- 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, to around 1,150 flights per day early August. International traffic has been recovering at the same levels as domestic from early April but is slightly lagging behind (1,011 flights per day on 9 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 1<sup>st</sup> of June followed by a more limited one on 1<sup>st</sup> of July but remained pretty stable since then.



- **News and Plans for key worldwide airlines:**

### Other Europe (Russia)

- **Aeroflot** announces suspension of a number of scheduled flights to over 80 international destinations.

### Middle-East

- **Etihad** will operate 50% of pre-COVID flights to 61 destinations in August/September.
- **Emirates** will resume flights to Lisbon and Kuwait City in August; putting A380 on Dubai-Toronto route.

### Asia/Pacific

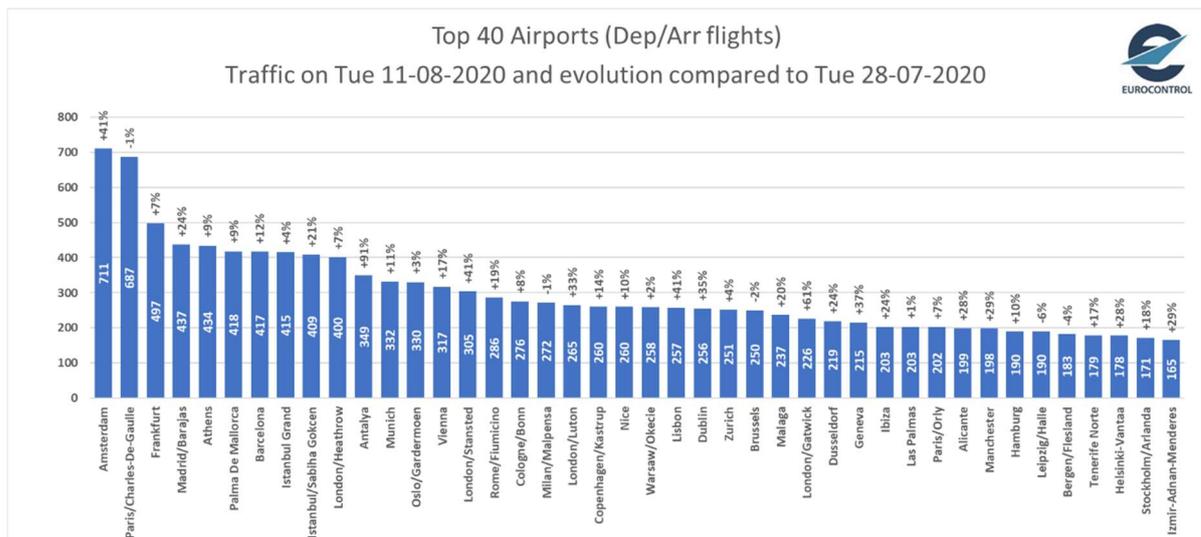
- **Asiana** to resume Seoul-Paris route and increase frequency to Frankfurt and London Heathrow as of September.

### America

- **Delta Airlines** to resume Atlanta-Munich service.

## 4. Airport Information

- Amsterdam is the busiest airport with 711 dep/arr flights on 11 August, exceeding Paris CDG (687 fl/day). AMS posted a 41% growth owing to KLM which increased their capacities from the Dutch airport by 86% (when comparing Tuesday 11 August with Tuesday 28 July). Frankfurt (487 fl/day) is the 3<sup>rd</sup> busiest airport. This ranking is in line with pre-COVID one but number of flights at these airports is nevertheless between 50%-60% below 2019 levels.
- Madrid (+24%) and Athens (+9%), tourist destinations, complete the top 5 busiest airports in Europe.
- Antalya's significant growth (+91%) is linked with restoration of flows from/to Russia.



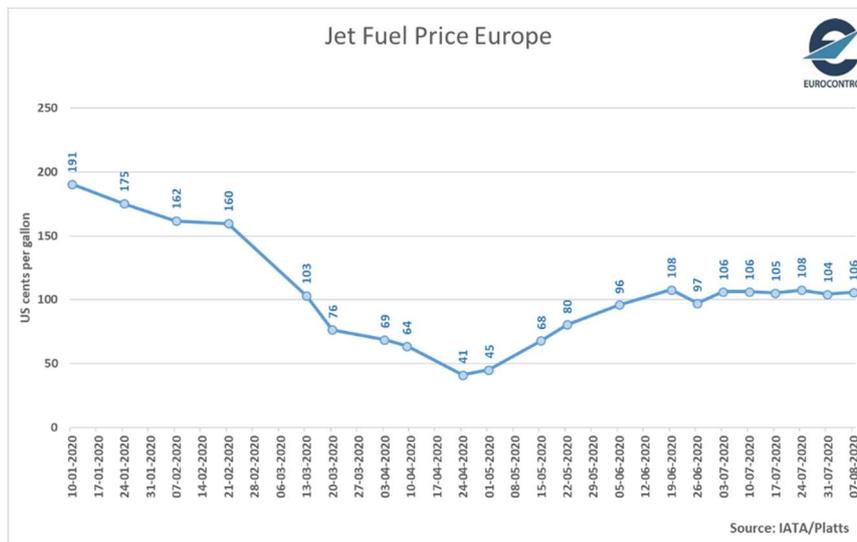
- After having reached an all-time low value of 60,356 passengers at European airports on 18 April (i.e. -99% compared to 2019), the number of passenger has started to increase again. During the second half of July, the number of passenger at ACI airports passed the bar of 2 million and reached 2.66 million on 2 August, still 69% below 2019 levels. For week 31, European passenger levels were 73% below 2019 levels. France and Italy seemed to be

recovering faster (resp. 67% and 70% below 2019) than Germany and UK (resp. 77% and 82% below 2019 levels).

- **ACI** reported on 7 August that, at passenger level, “[...] the traffic recovery has been slower than expected”. In July, passenger traffic across the European airport network declined by 78% (vs same month in 2019).

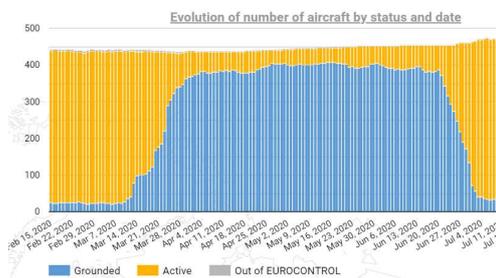
### 5. Other factors

- **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 since the beginning of July.

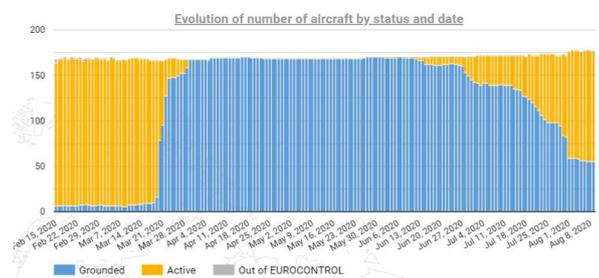


- **Fleet re-activation and utilisation:** Aircraft operators have been progressively expanding their operations when the borders re-opened. They “re-activated” their fleet at different rates as shown for 4 main LCC below:

#### Ryanair:



#### EasyJet UK:

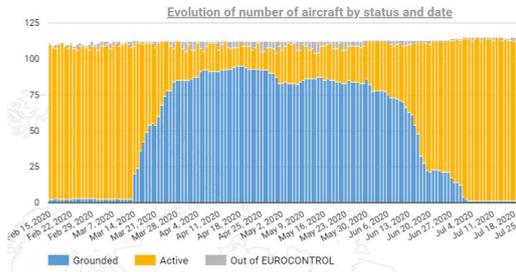


# COVID19 Impact on European Air Traffic

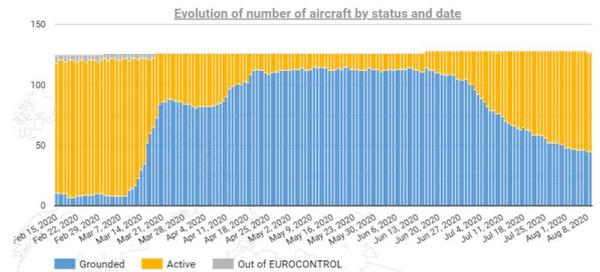
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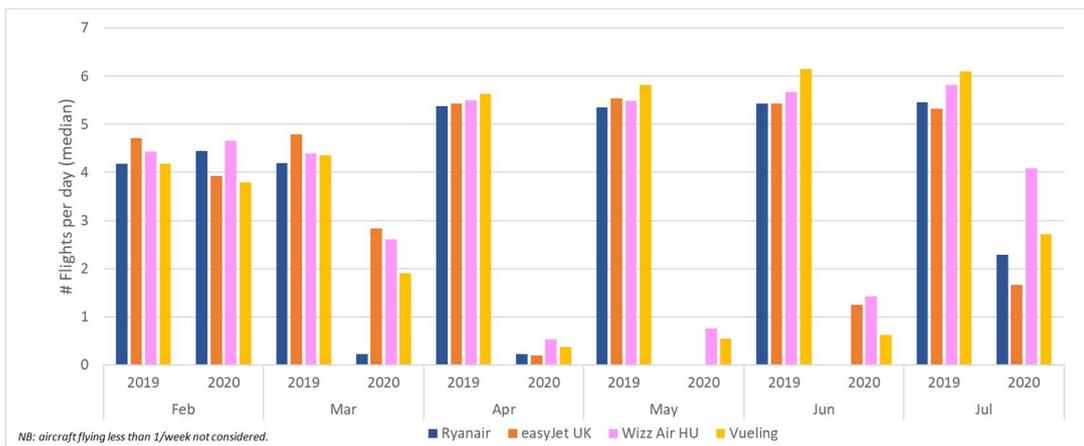
### Wizz Air Hungary:



### Vueling:



Hence, LCC have been concentrating on connectivity, aiming at proposing a high number of pre-COVID served routes (within Europe). However, their aircraft “utilisation” remains quite low, when compared to last year’s levels, as shown on the graph below. The number of flights flown by each aircraft in July 2020 is still 60% below the 2019 utilisation levels for Ryanair, -69% for easyJet, -30% for Wizz Air and -56% for Vueling.



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](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 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.

