Traffic Situation & Airlines Recovery

- 16,804 flights on Wednesday 26 August, (+4% with +600 flights compared to Wednesday 12 August) reaching 47% of 2019 traffic levels.
- Friday 21 August was peak traffic day since 18 March with 18,365 flights, 50.2% of the 2019 levels.
- The steady traffic increase has now clearly stopped since the 7th of August and traffic is at -51.5% (7-day rolling average) compared to 2019. Growing uncertainly with regard to September/October period because of recent airline announcements to reduce capacity due to the introduction of State restrictions, of end of summer holiday, no restart of long-haul flights, and huge uncertainty about business travels as of September.
- Ryanair remains the busiest carrier with 1,370 flights on 26 August (+1% on 12 August) followed by easyjet (922 flights, +1%). Air France is the traditional carriers which has most increased its capacities (+15%) followed by SAS (+14%). On the other side,(Lufthansa (-8%) and Turkish airlines (-13%) reduced their capacity.
- Airlines adding the highest number of flights, when comparing Wednesday 26 August with the same day two weeks ago, were: Air France (adding 67 flights) followed by NetJets (+41 flights), Jet2.com (+40), SAS (+39), Wideroe (+37), Pegasus (+30), LoganAir (+23), VistaJet (+20), Air Hamburg (+19) and Easyjet (+13).
- Compared to 2019, Wideroe operated at -15% on Wednesday 26 August, Pegasus (-29%), Wizz Air (-30%), KLM (-44%), Ryanair (-47%), Easyjet (-51%), Vueling (-54%), Air France (-54%), Turkish Airlines (-56%), Lufthansa (-73%) and British Airways (-80%).
- Traffic in Europe in August (-52%) is currently in line with the EUROCONTROL “coordinated” scenario.
- Compared to 2019, Departure/Arrival traffic in the UK was -60% on Wednesday 26 August, Germany (-58%), Spain (-57%), Italy (-54%), Turkey (-51%) France (-46%).
- Business Aviation reached 1% above 2019 levels on 26 August. All-cargo stable at 3% above last year’s levels. Low-cost and Charter stable at -51% over the last week. Traditional stable at -63%.

Traffic Flows & Country Pairs

- The main traffic flow is the intra-Europe flow with 14,328 flights on 26 August (+3% on 12 August). Top traffic flows with Europe were with “Middle-East” with 442 flights (+6%), followed by flows with “Other Europe” (413 flights, +14%), “North-Atlantic” (386 flights, -3%) and “North-Africa” (298 flights, +17%).
- Flows within France showed the highest increase with +43% followed by UK (+10%), Spain Continental (+8%) and Norway (+7%). However, domestic flows in Norway, Italy and Greece were stable and even decreased by -6% in Germany.
- The flow between UK and Spain (+1%) was the busiest non domestic flows and is stable compared to 2 weeks ago. The flows between UK-Greece (+10%) and UK-Italy (+18%) increased while the flows between Germany-Spain decreased by -18%. Domestic flows within Denmark increased by 32% to reach 107 flights on 26 August.

Situation outside Europe

- Traffic is also stable in the US, China and Middle East over the last two weeks.

Airport Information

- Amsterdam was the busiest airport with 772 Dep/Arr flights on 26 August, followed by Paris CDG (755), Frankfurt (565), Athens (458), Istanbul/Sabiha (453), Madrid (451), Istanbul Grand (445) and London Heathrow (407).
- Most airports posted a limited growth compared to 2 weeks before with the exception of Istanbul/Sabiha (+7%), Madrid (+6%) and Antalya (+9).
- Compared to 2019, Athens operated at -42% on 27 August, Amsterdam (-50%), Paris CDG (-52%), Frankfurt (-63%), Madrid (-63%), Roma (-69%) and London Heathrow (-70%).

Economic

- **Fuel Price**: The jet fuel price is now stable at around 106 cts/gal since mid-June 2020.
1. Traffic Situation and Airlines Recovery

- 16,804 flights on Wednesday 26 August, (+4% with +600 flights compared to Wednesday 12 August). This is 47% of 2019 traffic levels. Based on a 7-day moving average, the decrease is -51.5% (7-day rolling average) compared to 2019 which is now stable since 7 August.
- It’s now clear that the steady traffic increase which started on mid-April has now stopped since the 7th of August and there is increased uncertainty with regard to September/October period as a result of recent airline announcements (e.g. Ryanair and easyJet) to reduce capacity due to the introduction of State restrictions.
- Friday 21 August was a peak day (18,365 flights), and traffic levels reached above 50.2% of 2019 levels for the first time since 18 March.

![EUROCONTROL Network Daily Variation (Flights) compared with equivalent days in 2019](image)

![Traffic variation between 2020 and 2019 at Network Manager Area level](image)
NOP Recovery Plan (dated 21 August):

- The latest European NOP 2020 Recovery Plan (published on Friday 21 August) had indicated that traffic could potentially reach up to 21,000 flights on some peak days during September. This traffic outlook for September is lower than the ones presented in previous weeks as it reflects the changes in schedules resulting from the various new state restrictions. [Please note: The latest changes might not be fully reflected in the airline schedules and airport slots and might lead to ad-hoc cancellations].

- Due to more recent airline announcements, it is highly likely that this projection will be further downgraded as it is highly dependent on the evolution of State restrictions which are now being imposed/re-instated.

- General stabilisation of the traffic for most airlines. Ryanair was, by far, the airline with the highest number of flights with 1,370 flights on Wednesday 26 August but with a slight decrease compared to Wednesday 12 August. easyJet, the 2nd busiest operator with 922 flights on 26 August, increased its capacity by +1% (on Wednesday 12 August).

- Compared to two weeks ago, Air France is the traditional carriers which has most increased its capacities (+15%) followed by SAS (+14%). On the other side, Lufthansa (-8%) an Turkish airlines (-13%) reduced their capacity.

- Airlines adding the highest number of flights, when comparing Wednesday 26 August with the same day two weeks ago, were: Air France (adding 67 flights) followed by NetJets (+41 flights), Jet2.com (+40), SAS (+39), Wideroe (+37), Pegasus (+30), LoganAir (+23), VistaJet (+20), Air Hamburg (+19) and EasyJet (+13).
COVID-19 Impact on European Air Traffic
EUROCONTROL Comprehensive Assessment

Aircraft operators
Traffic on Wed 26-08-2020 and evolution compared to Wed 12-08-2020

Absolute and % variation of flights for top 40 aircraft operators
between 10 August and 24 August
Compared to 2019, Wideroe operated at –15% on Wednesday 26 August followed by Pegasus (–29%), Wizz Air (–30%), KLM (–44%), Ryanair (–47%), EasyJet (–51%), Vueling (–54%), Air France (–54%), Turkish Airlines (–56%), Lufthansa (–73%) and British Airways (–80%).

News from key European airlines:

- **Air France** resumes weekly Paris CDG-Beijing service and its services from Orly to Brest & Toulouse.
- **easyJet** reported to be suspending some UK services to Ljubljana, Dubrovnik, Split and Pula but bringing forward Luton service to Ljubljana.
- **Wizz Air** postponing launch (planned for September) of services from St Petersburg to Copenhagen, Malta, Salzburg, Oslo and Stockholm; but expanding Vilnius base from October.
- **Austrian Airlines** resuming services to Shanghai, Leipzig, Cologne and, in September, Tel Aviv & Amman; stopping payments of 2019 bonuses for management board.
- **Turkish Airlines** postpones launch of Newark and Vancouver services.
- **KLM** to resume passenger service to Hangzhou.
- **Lufthansa** to discontinue a number of short/medium-haul routes from Frankfurt & Munich over the winter.
- **British Airways** to increase frequency of flights to Islamabad.
- **SAS** encouraged to see that demand is slowly returning, aims for 30-40% of 2019 ASK levels by the end of 2020 and defers delivery of ten aircraft.

Based on traffic levels, the Top 6 busiest States¹ has slightly changed with Germany moving from the 1st rank to the 3rd with UK (+6%), France (+13%), Germany (–4%), Spain (–3%), Italy (–1%) and Turkey (+2%). Flows between North-West Europe and Southern Europe have stabilized over the last 2 weeks. Denmark and Ukraine were the only top 20 States showing a 2-digit increase.

¹ excluding overflights.
Compared to 2019, Departure/Arrival traffic in the UK was -60% on Wednesday 26 August, Germany (-58%), Spain (-57%), Italy (-54%), Turkey (-51%) France (-46%).
• **Overall situation against EUROCONTROL traffic scenarios:** The number of flights for the first 26 days of August 2020 has now stabilized at 52% below 2019 levels and is currently in line with the EUROCONTROL traffic scenario of 24 April. (“Coordinated Measures Scenario”).

![EUROCONTROL Draft Traffic Scenarios](image)

- When considering market segments, the Business Aviation flights are at the 2019 levels (+1%). All-cargo flights remained quite stable during the crisis and are now 3% above the 2019 levels (on 22 August).
- Low-cost recorded a faster recovery (-51% vs 2019) and is now at the level of Charter flights. All segments are now showing a plateau, in particular traditional flights with -64%.

![Market segments in EUROCONTROL Network](image)
2. Traffic Flows & Country Pairs

- The major traffic flow is the intra-Europe flow with 14,328 flights on 26 August, which increased by +3% compared to two weeks before (12 August).

- The top traffic flows with Europe were with “Middle-East” with 442 flights (+6%), followed by flows with “Other Europe” (413 flights, +14%), “North-Atlantic” (386 flights, -3%) and “North-Africa” (298 flights, +17%).

<table>
<thead>
<tr>
<th>REGION</th>
<th>12-08-2020</th>
<th>26-08-2020</th>
<th>%</th>
<th>vs. 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intra-Europe</td>
<td>13,875</td>
<td>14,328</td>
<td>+3%</td>
<td>-49%</td>
</tr>
<tr>
<td>Europe&lt;-&gt;Asia/Pacific</td>
<td>293</td>
<td>311</td>
<td>+6%</td>
<td>-62%</td>
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<td>Europe&lt;-&gt;Mid-Atlantic</td>
<td>56</td>
<td>57</td>
<td>+2%</td>
<td>-66%</td>
</tr>
<tr>
<td>Europe&lt;-&gt;Middle-East</td>
<td>418</td>
<td>442</td>
<td>+6%</td>
<td>-75%</td>
</tr>
<tr>
<td>Europe&lt;-&gt;North Atlantic</td>
<td>396</td>
<td>386</td>
<td>-3%</td>
<td>-73%</td>
</tr>
<tr>
<td>Europe&lt;-&gt;North-Africa</td>
<td>254</td>
<td>298</td>
<td>+17%</td>
<td>-75%</td>
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<tr>
<td>Europe&lt;-&gt;Other Europe</td>
<td>363</td>
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<tr>
<td>Europe&lt;-&gt;Southern Africa</td>
<td>144</td>
<td>140</td>
<td>-3%</td>
<td>-56%</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). Flows within France showed the highest increase with +43% followed by UK (+10%), Spain Continental (+8%) and Norway (+7%). However, domestic flows in Norway, Italy and Greece were stable and even decreased by -6% in Germany.

The flow between UK and Spain (+1%) was the busiest non domestic flows and is stable compared to 2 weeks ago. The flows between UK-Greece (+10%) and UK-Italy (+18%) increased while the flows between Germany-Spain decreased by -18%.

As noted previously, the domestic flows within Denmark increased by 32% to reach 107 flights on 26 August.
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. The domestic flow remained on a plateau at -45% of 2019 on August 16. International flows remained low at -78% except flows to/from Mexico (-60%).

![Graph showing traffic trend](image)

- 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 but is now stable since the beginning of August. These data are based on OpenSky Network ADSB data.

![Graph showing traffic variation in the US](image)

- **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. Chinese domestic flights are now stable with 11,270 flights after having reached a maximum of 12,168 flights on 25 August only 13% below pre-COVID levels. The number of international flights remained stable over the same period (with 1,233 flights, i.e. still 70% below pre-COVID levels). The same is true for overflights (489).
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.

**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 reaching 1,190 flights on 26 August. International traffic has been recovering at the same levels as domestic from early April but is slightly lagging behind (1014 flights per day on 26 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 but remained pretty stable since then.

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

- **China Eastern Airlines** resumes inflight hot meal service for domestic flights.
- **Qantas** reports pax down 26.5% in year to end June, commences 3 year recovery plan with at least 6,000 redundancies.
- **Japan Airlines** reducing domestic frequencies – to an overall reduction of 43% in early September.
- **American Airlines** delays resumption of 15 domestic services until October, expects to reduce its workforce by 40,000 in October.
4. Airport Information

- Amsterdam was the busiest airport with 772 Dep/Arr flights on 26 August, followed by Paris CDG (755), Frankfurt (565), Athens (458), Istanbul/Sabiha (453), Madrid (451), Istanbul Grand (445) and London Heathrow (407). Most airports posted a limited growth compared to 2 weeks before with the exception of Istanbul/Sabiha (+7%), Madrid (+6%) and Antalya (+9).

- Compared to 2019, Athens operated at -42% on 27 August, Amsterdam (-50%), Paris CDG (-52%), Frankfurt (-63%), Madrid (-63%), Roma (-69%) and London Heathrow (-70%).
News and Plans for key airports:
- Brussels Airport completes major runway renovation works on schedule
- Zurich Airport expects full year loss despite cost reductions
- Manchester Airport closing Terminal 2 (which reopened on 15 July) from 2 September until further notice

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 at around 106 cts/gal since the beginning of July.

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.