

Tuesday, 15 September 2020

Traffic Situation & Airlines Recovery

- 16,341 flights on Monday 14 September, (-9% with -1,676 flights vs. 31 August) reaching 46% of 2019 levels.
- Traffic 1-14 September is -53% below 2019 levels for the same period.
- Revised EUROCONTROL traffic scenarios have been published on 14 September to take account of the impact of individual and uncoordinated national restrictions, quarantine requirements and testing measures. The new “Current Status Scenario” plans a total number of flights in Europe to be 55% lower than in 2019, a drop of 6 million flights (a further 1 million reduction than previously anticipated), resulting in a total industry loss in Europe in revenues of approximately €140 billion during 2020 for airlines, airports and ANSPs.
- Airlines are reporting very low forward booking rates until end of 2020 compared to normal.
- On 14 Sept, Ryanair and easyJet removed almost 600 flights compared 31 Aug which was not compensated by other airlines. Ryanair remains the busiest carrier with 1,287 flights on 14 Sept showing a decrease of -23% compared to 31 Aug (-391 flights). EasyJet was the 2nd busiest operator with 780 flights (-20%, -197 flights), followed by Turkish Airlines (677 flights, -3%, -22 flights), Air France (633 flights, -7%, -48 flights), Lufthansa (534 flights, -4%, -24 flights), KLM (4367 flights, -7%, -33 flights) and Wizz Air (427 flights, -20%, -104 flights).
- Compared to two weeks ago, Norwegian Air Shuttle was the carrier which had the largest capacity increase (+44 flights) followed by LoganAir (+43), Eurowings (+24), Air Baltic (+24), Pegasus (+16), Qatar Airways (+12), DHL Express (+11) and TAP/Air Portugal (+11). Almost all low cost and legacy carriers decreased their capacity.
- Compared to 2019, Wideroe operated at -21% on 14 Sept followed by Pegasus (-27%), Wizz Air (-36%), KLM (-39%), Air France (-46%), Ryanair (-51%), Turkish (-52%), easyJet (-60%), Lufthansa (-67%) and BA (-74%).
- Compared to 2019, dep/arr traffic in Spain was -61% on 14 Sept, UK (-60%), Germany (-55%), Italy (-54%), France (-51%) and Turkey (-47%).
- Bizz Aviation recovery has been losing pace since early Sept (reaching -10% vs. 2019) while all-cargo remains stable at 2019 levels (+1%). Low-cost flights recorded a faster recovery during the summer but decreased early Sept with -56%. Charter flights have stabilized at -47%.
- After having reached its maximum (10%) in April-May, the share of pax-cargo is now stable at around 1.2%.

Traffic Flows & Country Pairs

- The intra-Europe flow is the main flow with 14,048 flights on 14 Sept (-10% on 31 August). Top traffic flows with Europe were with “North-Atlantic” (428 flights, +6%) followed by “Middle-East” (413 flights, +0%), “Other Europe” (340 flights, -15%), “Asia/Pacific” (320 flights, +1%) and “North-Africa” (216 flights, -24%).
- Intra-Europe flow remains at -50% compared to 2019 while all other flows are at -70%.
- Flows within the UK increased the most with +16% followed by Germany (+10%) and Norway (+4%). All other domestic flows decreased like in Greece (-13%), Spain Cont. (-11%), France (-8%), Italy (-7%) and Turkey (-4%).
- The busiest non domestic flows was the flow between the UK and Spain (255 flights) and decreased by -24% compared to 2 weeks ago, followed by the flow between the UK and Italy (220, -22%).

Airport Information

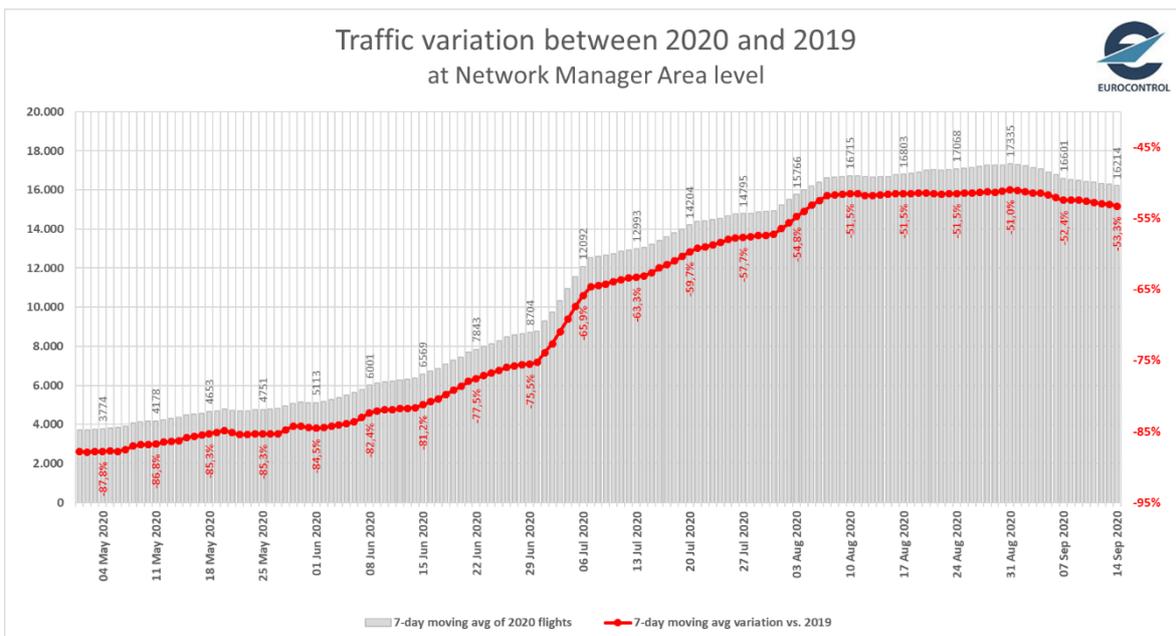
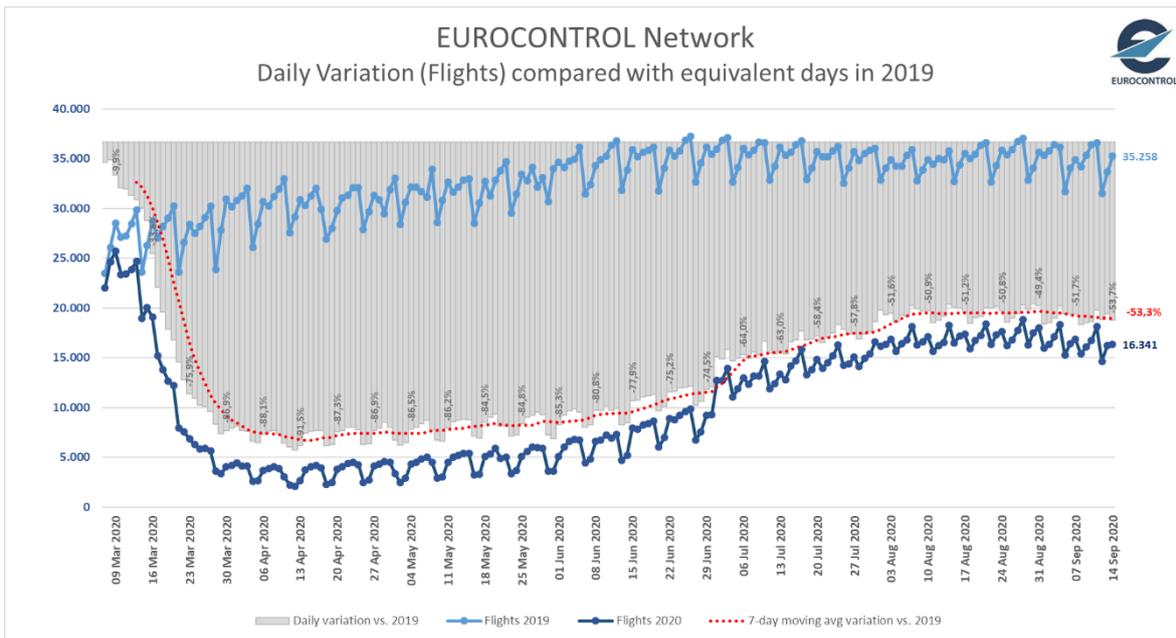
- After having reached -69% in August compared to August 2019, passenger traffic started to decrease since mid-August to reach 2.5 million passengers on Sunday 6 September (-70% compared to 2019).
- Amsterdam was the busiest airport with 793 Dep/Arr flights on 14 Sept, followed by Paris CDG (642), Frankfurt (563), iGA Istanbul Airport (503), London/Heathrow (489), Istanbul/Sabiha (459) and Munich (440).
- From the biggest airports, only Oslo had an increased compared to 3 Aug (+3%). While iGA Istanbul Airport remained stable, all airports reported a decrease: Madrid (-16%), Barcelona (-14%), Paris/Orly (-14%), Athens (-13%), Paris CDG (-12%), Amsterdam (-9%), London/Heathrow (-7%), Frankfurt (-6%) and Munich (-5%).

Economic

- **En-route air navigation charges:** The amount billed for en-route charges went up to 330M€ for August flights (-60% compared to plan). During the crisis, the average aircraft weight per flight reached 112 tons in April (+28% compared to 2019) while the average distance flown per flight reached -13% in June compared to 2019.
- **Fuel price:** Fuel price decreased to 93cts/gal in the second week of September.

1. Traffic Situation and Airlines Recovery

- 16,341 flights on Monday 14 September, (-9% with -1,676 flights compared to Monday 31 August). This is 46% of 2019 traffic levels. Based on a 7-day moving average, the decrease is -53.3% compared to 2019 which is now degrading since early September due to the increase of States' restrictions and the removal of almost 600 flights by Ryanair (-391) and easyJet (-197) compared to 2 weeks ago, which is not compensated by all other airlines.
- Friday 28 August remains the peak day (18,802 flights) when traffic levels reached -49.2% of 2019 levels for the first time since 18 March.



COVID19 Impact on European Air Traffic

EUROCONTROL Comprehensive Assessment

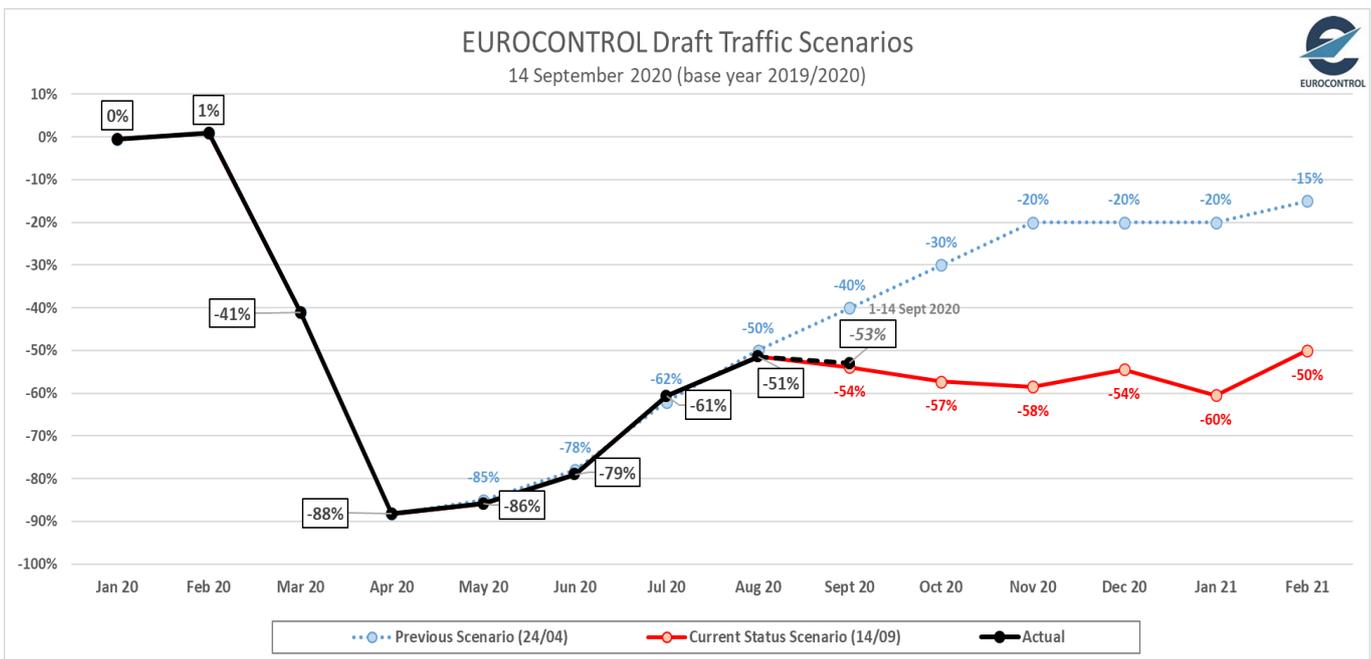


IATA reports that global cargo volumes are rising significantly and catching up with 2019 levels (-13.5% year on year); despite the continuing loss of capacity due to reduced widebody passenger aircraft flying international routes. The recovery reflects the redeployment of fleets, and greater utilisation of freight aircraft. Cargo revenues have doubled as a percentage of total revenue, currently at 25% compared with 10-12% pre-COVID.

OAG reports all bar two of the world's top 20 airports anticipate reduced September capacity compared to August, with only Bangkok (25% up) and Hong Kong (12% up) expecting to bear their August figures.

Overall situation against EUROCONTROL traffic scenarios:

- On 14 September, EUROCONTROL issued updated traffic scenarios to take account of the impact of individual and uncoordinated national restrictions, quarantine requirements and testing measures, which are primarily in accordance with National epidemiological assessments and National health measures. Often, these measures are announced with very short notice. This 'uncoordinated approach' by States has led to much confusion and eroded passenger confidence.
- Under its new "Current Status Scenario", the total number of flights expected in Europe is anticipated to be 55% lower than in 2019, a drop of 6 million fewer flights, or a further 1 million reduction in European flights than previously anticipated.



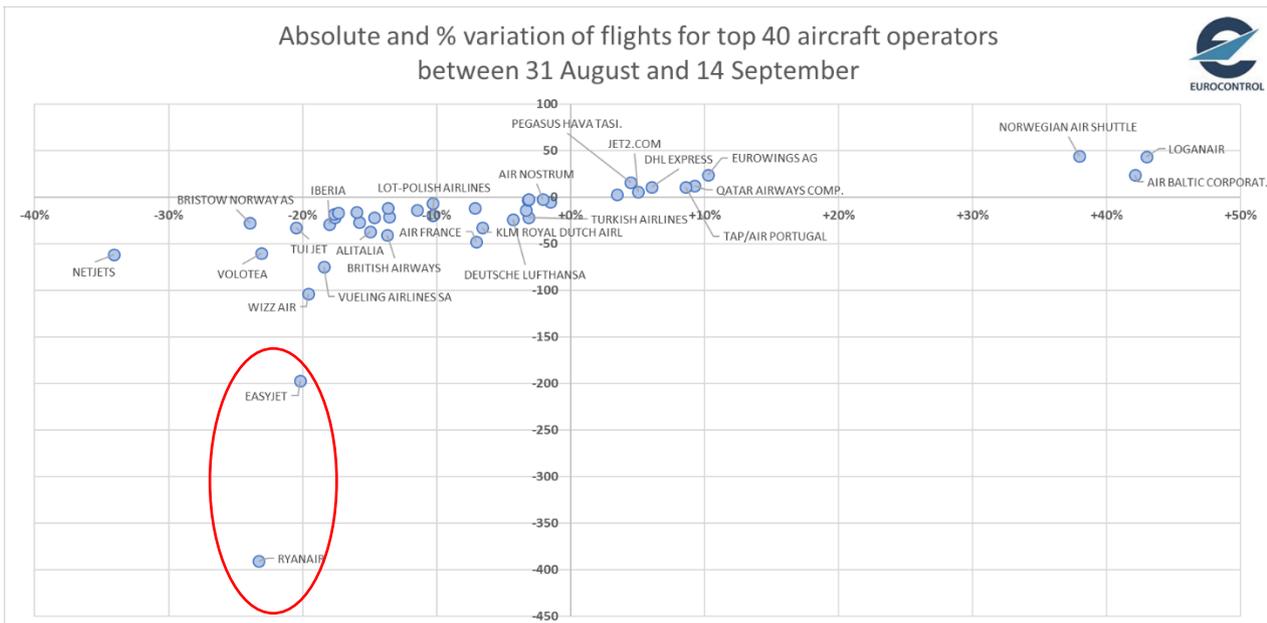
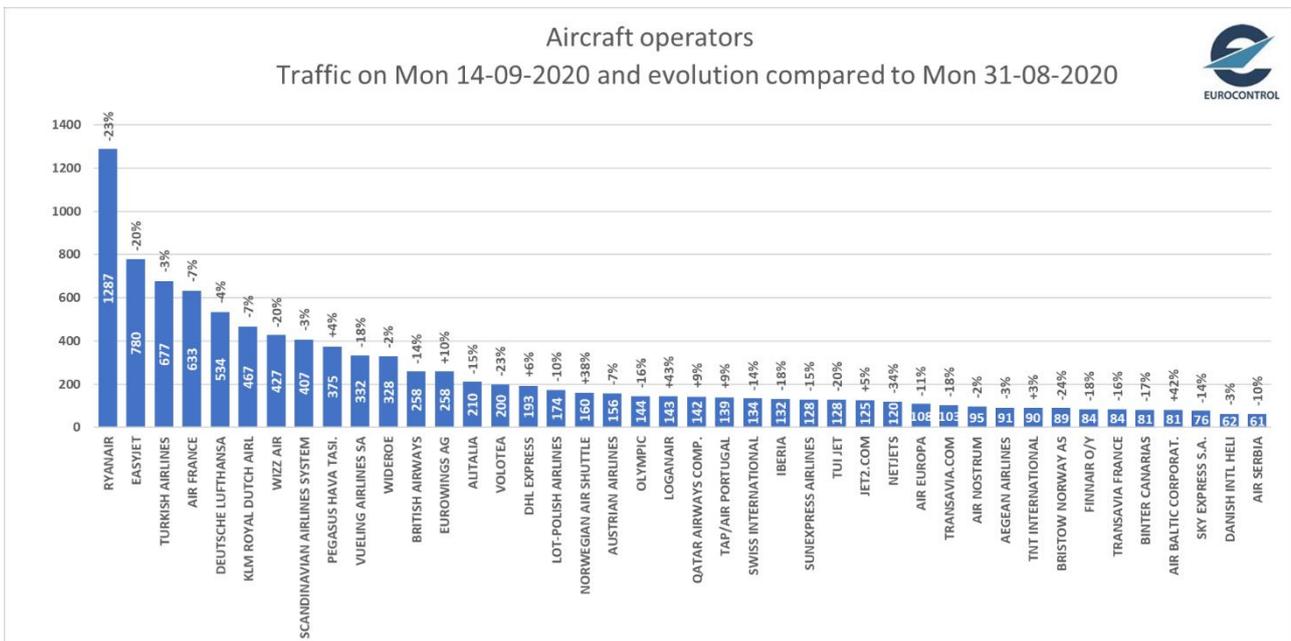
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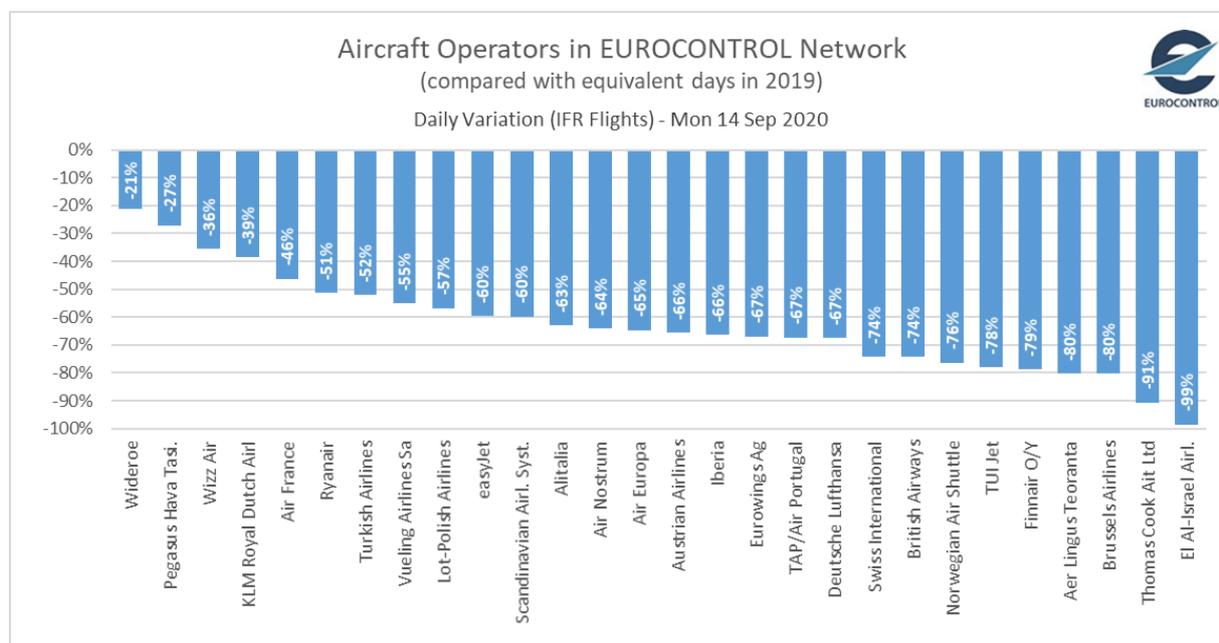


European Airlines:

- Ryanair was, by far, the airline with the highest number of flights with 1,287 flights on Monday 14 September showing a decrease of -23% compared to Monday 31 August (-391 flights). By decreasing its capacity by 20% (-197 flights), easyJet was the 2nd busiest operator with 780 flights, followed by Turkish Airlines (677 flights, -3%, -22 flights), Air France (633 flights, -7%, -48 flights), Lufthansa (534 flights, -4%, -24 flights), KLM (4367 flights, -7%, -33 flights) and Wizz Air (427 flights, -20%, -104 flights).
- Compared to two weeks ago, Norwegian Air Shuttle was the carrier which has most increased its capacities (+44 flights) followed by LoganAir (+43), Eurowings (+24), Air Baltic (+24), Pegasus (+16), Qatar Airways (+12), DHL Express (+11) and TAP/Air Portugal (+11). Almost all low cost carriers and legacy carriers decreased their capacity.



- Compared to 2019, Wideroe operated at -21% on Monday 14 September followed by Pegasus (-27%), Wizz Air (-36%), KLM (-39%), Air France (-46%), Ryanair (-51%), Turkish (-52%), easyJet (-60%), Lufthansa (-67%) and British Airways (-74%).



News from key European airlines:

- **Air France** increases September schedules by around 15% compared to August, reflecting higher domestic and intra-European demand.
- **easyJet** cuts schedules by 30% in September compared to August as national restrictions continue.
- **Finnair** reduces October schedules from 200 to around 80 daily movements as demand continues to drop, with a number of route resumptions postponed. Core connectivity between Finland and key Asian destinations is maintained however.
- **Jet2** suspends holidays to the Canaries and Portugal until 26 September following UK travel advice.
- **Laudamotion** announces closure of German ops with the last use of its Düsseldorf base in late October, following the already announced closure of Stuttgart planned for end-September.
- **Lufthansa** is considering further reducing its 4-engine widebody fleet, with potentially all A380 and 747-400s, and most A340s, set to be phased out.
- **Luxair** announces three new destinations in winter 2020 linking Luxembourg to Italy, Poland and Romania.
- **Pobeda and S7 Airlines** buck the global and national trend, recording 17.0% and 6.1% pax year-on-year growth in August, despite the Russian average of -36.6% of 2019 traffic pax volumes.
- **SAS** announces that as of November, it will be replacing widebody A340-300s with narrow-body A321neos on its transatlantic Copenhagen-Boston service. September services look to be over 20% on August, reflecting inter alia increased intra-Scandinavian traffic.
- **TAP Air Portugal** announces plans to resume 3 European services from Lisbon in summer 2021, and to add 3 new services to North Africa in May/June. Services resume to Accra, Bissau and Sao Tomé in early September.

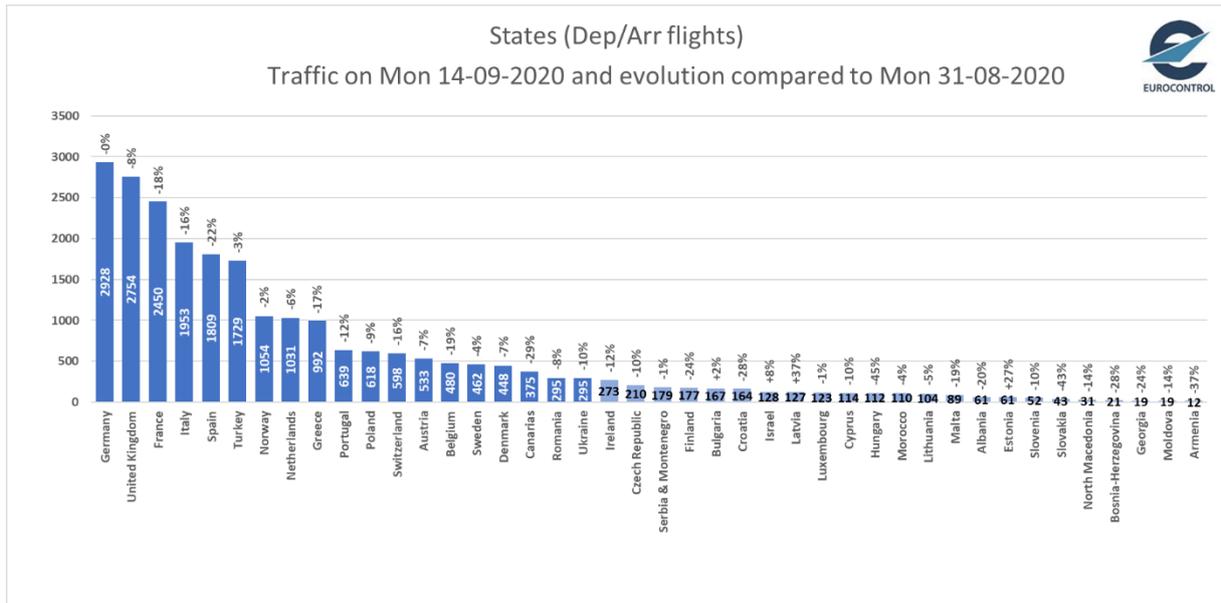
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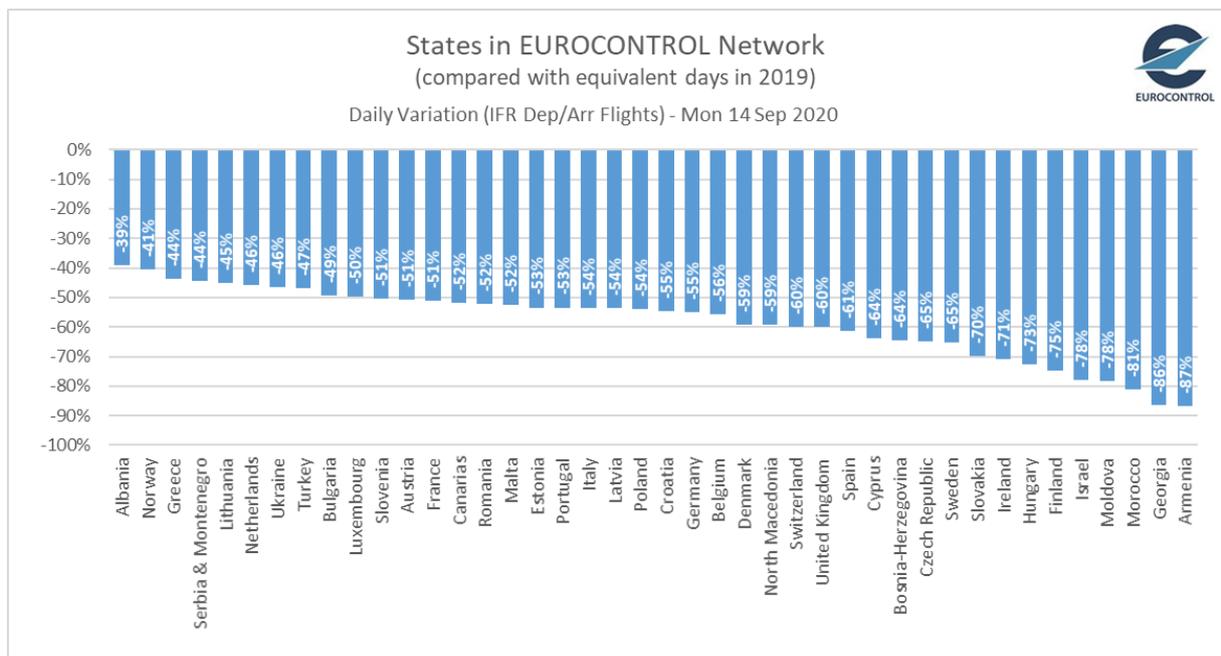


States

- Based on traffic levels, the Top 6 busiest States¹ is stable with Germany with 2928 flights on Monday 14 September (+0% over 2 weeks) followed by the UK (2754, -8%), France (2450, -18%), Italy (1953, -16%), Spain (1809, -22%), Turkey (1729, -3%), Norway (1054, -2%), Netherlands (1031, -6%), Greece (992, -17%), Portugal (639, -12%) and Poland (618, -9%). All flows between North-West Europe and Southern Europe are now decreasing compared to 2 weeks ago.



- Compared to 2019, Departure/Arrival traffic in Spain was -61% on Monday 14 September, UK (-60%), Germany (-55%), Italy (-54%), France (-51%) and Turkey (-47%).



¹ excluding overflights.



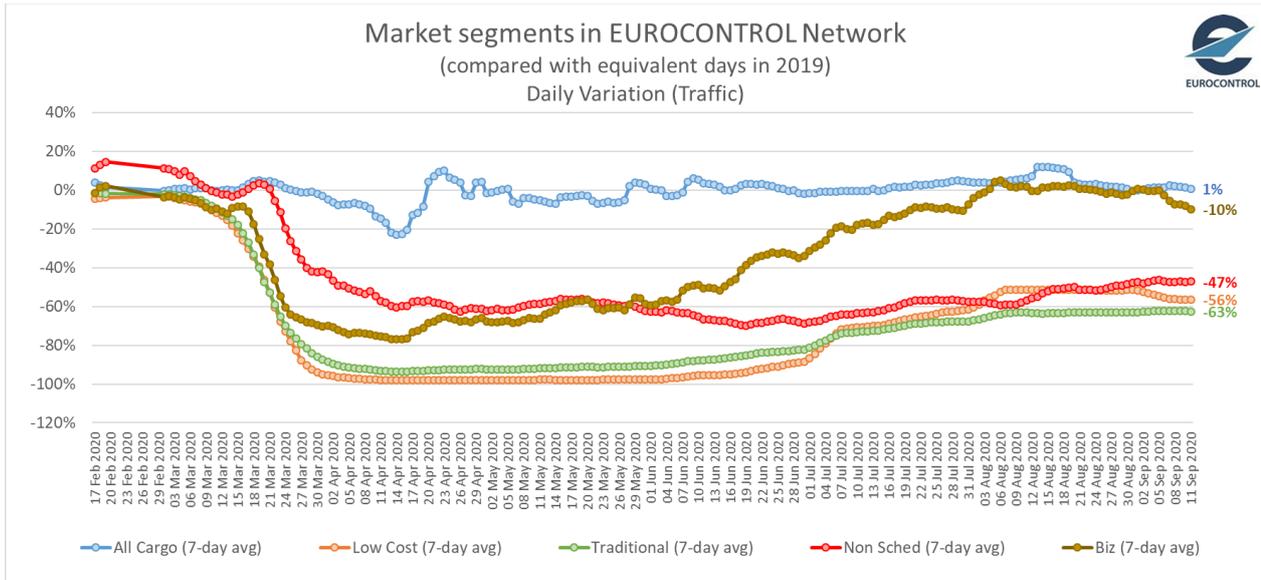
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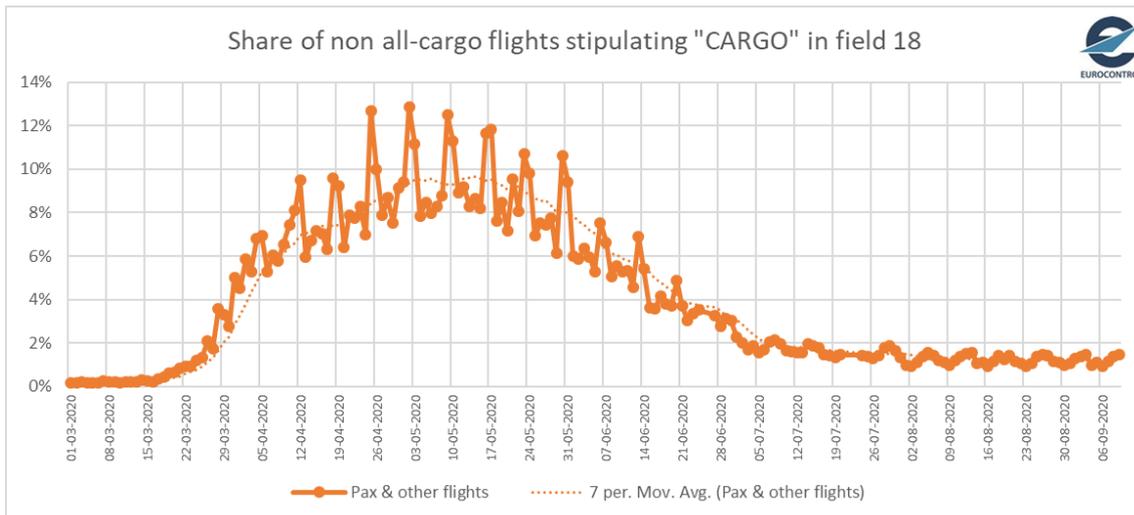


Market Segments:

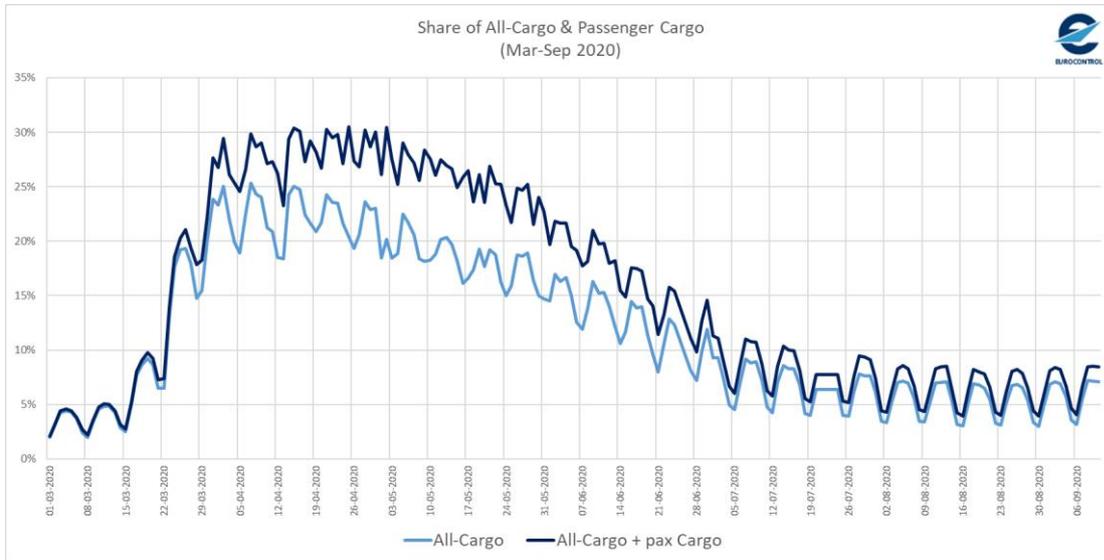
- Business Aviation recovery has been losing pace since early September (reaching -10% vs. 2019) while all-cargo remains stable at 2019 levels (1%).
- Low-cost flights recorded a faster recovery during the summer but decreased early September with -56% vs 2019. Charter flights have stabilized at -47%.



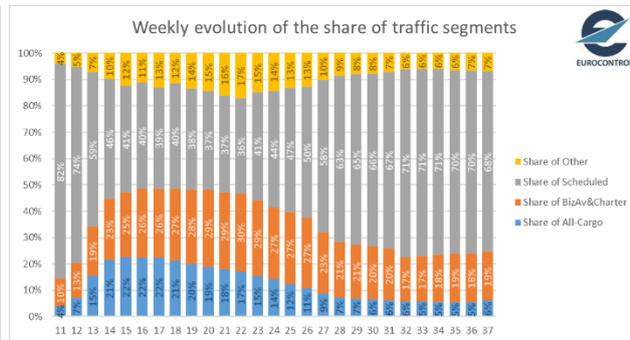
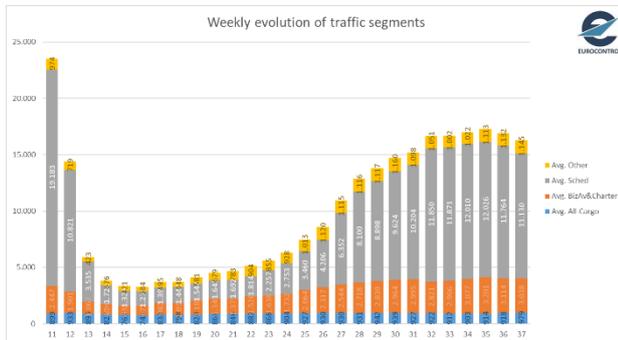
- After having reached its highest level in April-May (at around 10%), the share of pax-cargo is now stable at around 1.2% on week 37.



- Hence the share of all-cargo + pax-cargo is now stable at around 5.4% share last week.



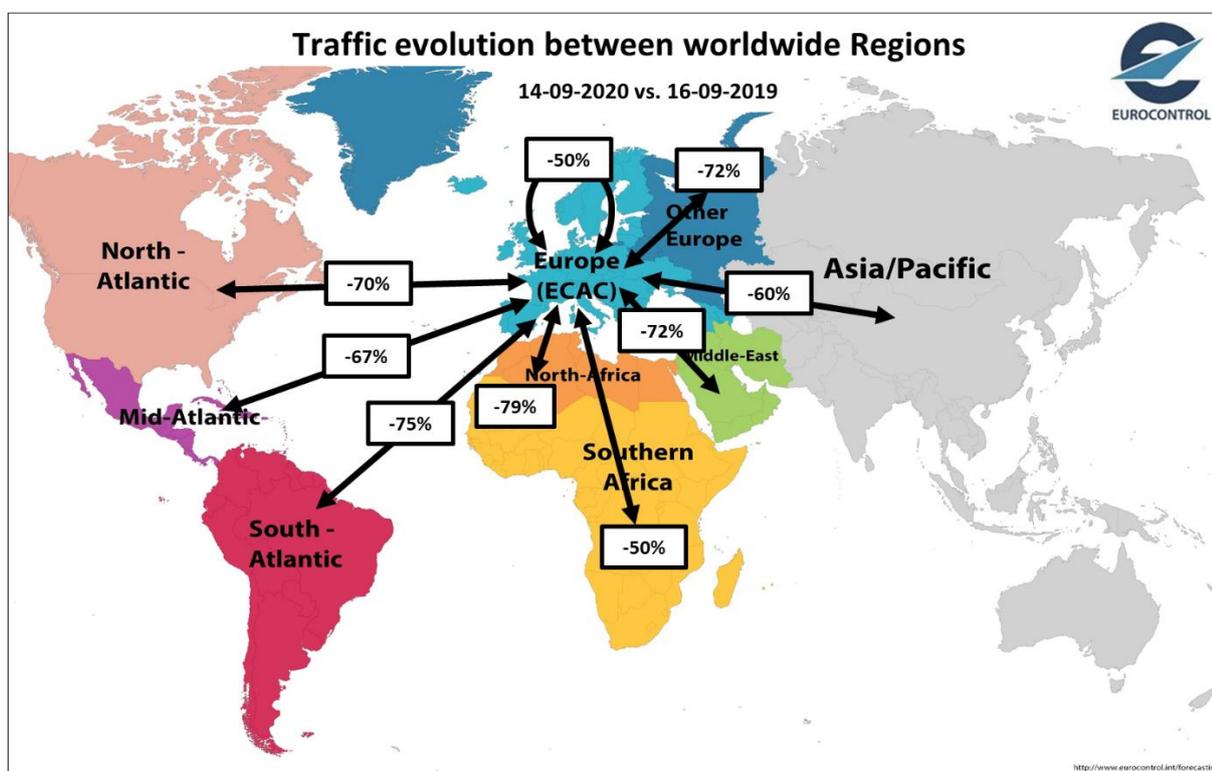
- It is to be noted that the total number of all-cargo flights has slightly increased on week 37. Other market segments slightly decreased (eg scheduled and non-scheduled) so the share of all-cargo slightly increased.



2. Traffic Flows & Country Pairs

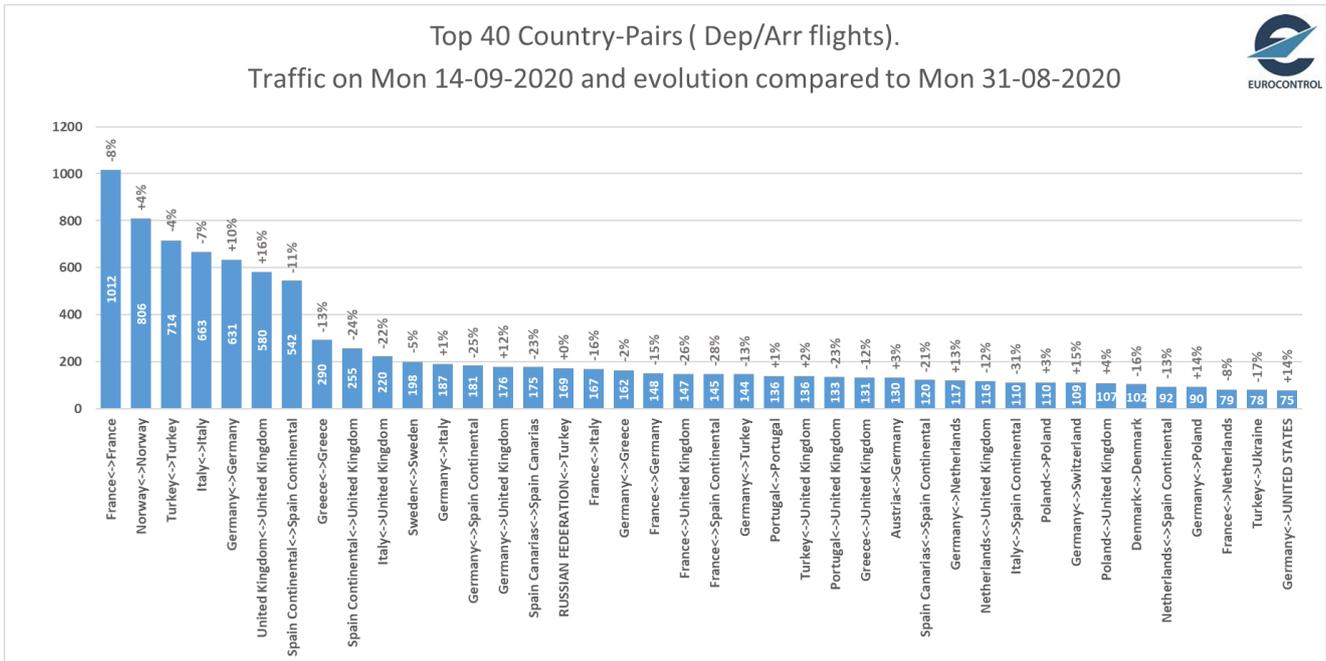
- The main traffic flow is the intra-Europe flow with 14,048 flights on Monday 14 September, which is decreasing (-19%) compared to Monday 31 August.
- The top traffic flows with Europe were with “North-Atlantic” (428 flights, +6%) followed by “Middle-East” (413 flights, +0%), “Other Europe” (340 flights, -15%), “Asia/Pacific” (320 flights, +1%) and “North-Africa” (216 flights, -24%).
- However, the Intra-Europe flights are still at -50% compared to 2019 while all other flows are at -70%.

REGION	31-08-2020	14-09-2020	%	vs. 2019
Intra-Europe	15.618	14.048	-10%	-50%
Europe<->Asia/Pacific	317	320	+1%	-60%
Europe<->Mid-Atlantic	64	49	-23%	-67%
Europe<->Middle-East	412	413	+0%	-72%
Europe<->North Atlantic	403	428	+6%	-70%
Europe<->North-Africa	283	216	-24%	-79%
Europe<->Other Europe	399	340	-15%	-72%
Europe<->South-Atlantic	42	48	+14%	-75%
Europe<->Southern Africa	130	149	+15%	-50%
Non Intra-Europe	2.050	1.963	-4%	-70%



ECAC = 44 European States.

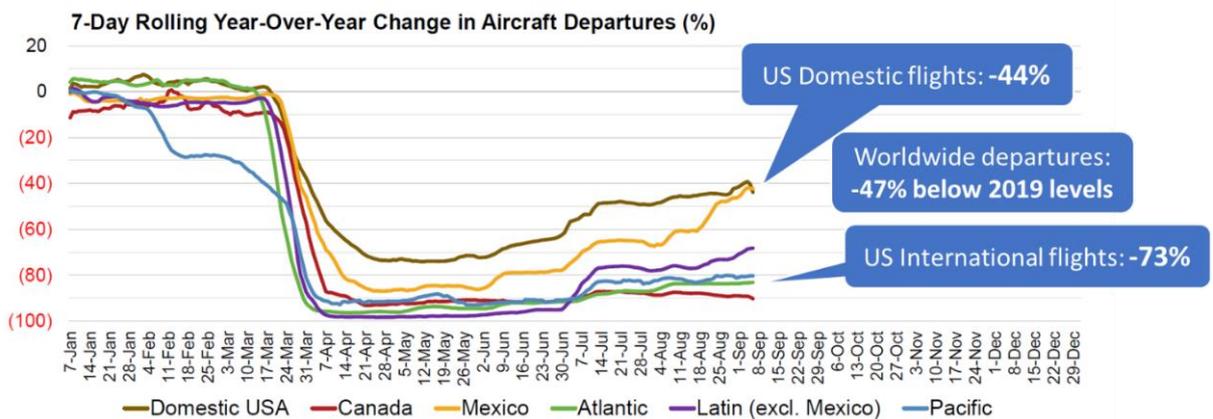
- Domestic flows are the most active flows (i.e. 8 of the top 10 flows are domestic). Flows within the UK showed the highest increase with +16% followed by Germany (+10%) and Norway (+4%). All other domestic flows decreased like in Greece (-13%), Spain Continental (-11%), France (-8%), Italy (-7%) and Turkey (-4%).
- The busiest non domestic flows was the flow between the UK and Spain (255 flights) and decreased by 24% compared to 2 weeks ago, followed by the flow between the UK and Italy (220, -22%).



3. Situation outside Europe

- United-States:**
 - After a significant drop of traffic in the US by the end of March, US domestic traffic has improved since early June with a noticeable step change on 1st July. Since 1st of September, the domestic flow slightly decreased to reach -44% of 2019 on 6 September. International flows slightly increased to -73% except flows to/from Mexico (around -44%).
 - In week ending September 6, U.S. airlines passenger volumes remained 65% below year-ago levels with Domestic Air Travel Down 62% and International Down 84%.
 - The domestic U.S. Load Factor averaged 51% in most recent week, versus 81% a year earlier.

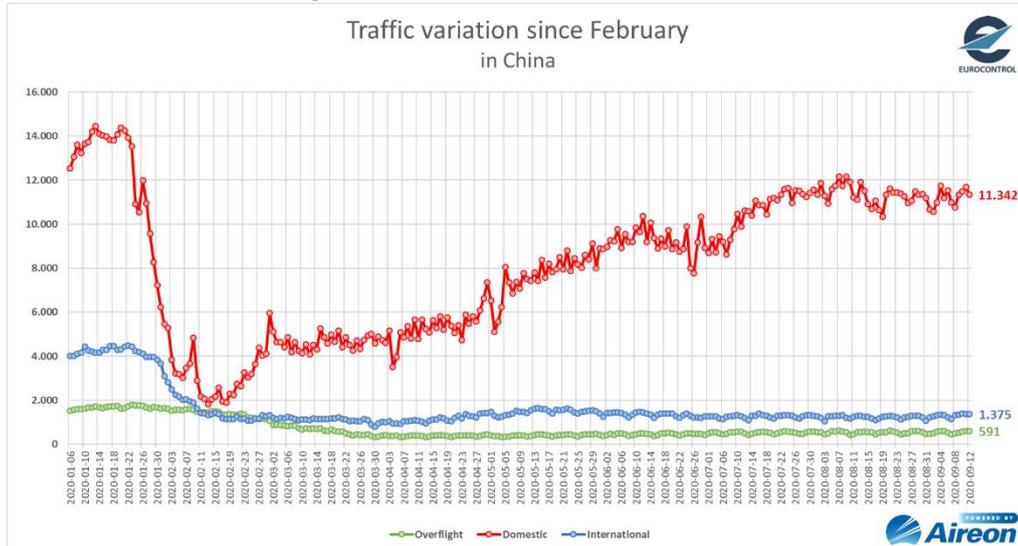
For U.S. Passenger Airlines, Worldwide Departures Remain 47% Below 2019 Levels In Week Ending Sept. 6 – Domestic Flights Down 44%, International Flights Down 73%



Source: A4A member passenger airlines as reported to A4A on a consolidated company basis (including branded code share partners)

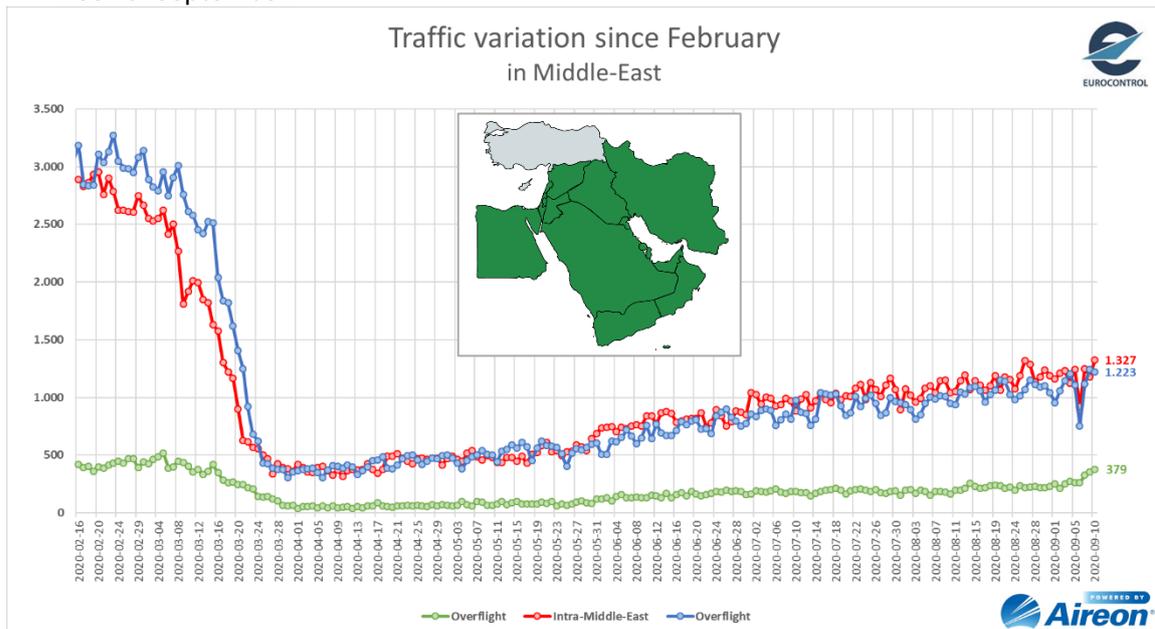
- **China:**

- Chinese domestic flights are now stable with 11,342 flights after having reached a maximum of 12,168 flights on 25 August only 13% below pre-COVID levels. The number of International flights has been stable since March (with 1,375 flights, i.e. still 70% below pre-COVID levels). The same is true for overflights (591).



- **Middle East:**

- Since the beginning of April, Intra-Middle-East traffic has been increasing slowly reaching 1,327 flights on 10 September. International traffic has been recovering at the same levels as domestic from early April but is slightly lagging behind (1,223 flights). Some travel restrictions are still in place for international flows. Overflights have started to increase since the second week of September.

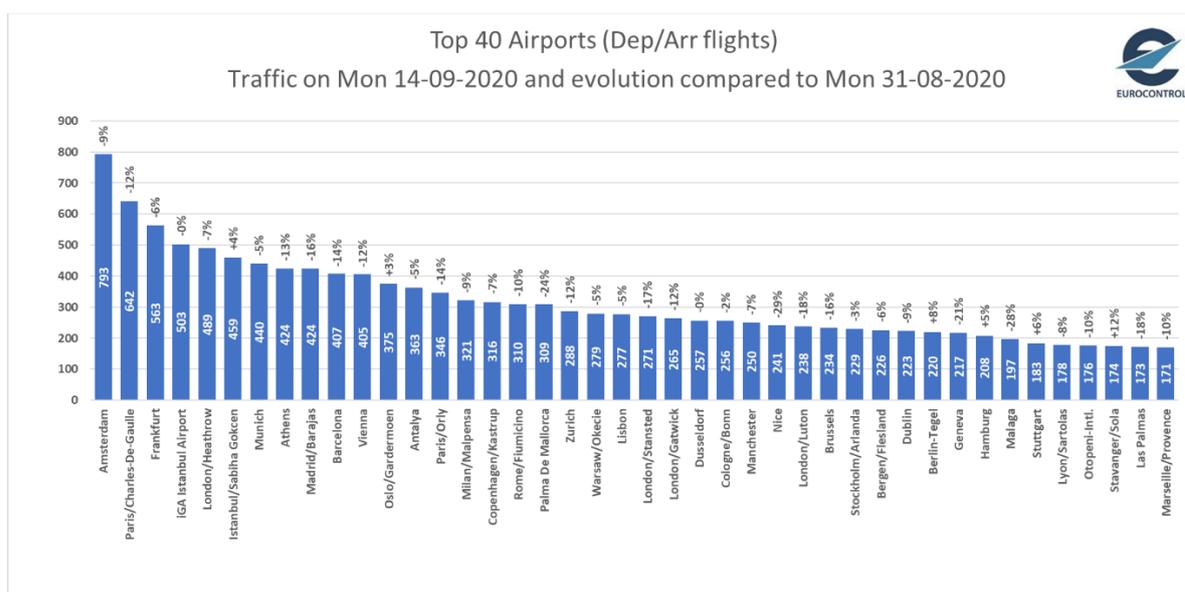


News and Plans for key worldwide airlines:

- **Africa**
 - **Ethiopian Airlines** announces plans to resume passenger services to nine European destinations in October.
- **Asia/Middle East**
 - **Emirates** intends to resume flights to Casablanca from mid-September, bringing the total of restored African destinations to 14.
 - **Etihad** intends to resume flights to Casablanca and Rabat by end-September, bringing the total of international routes currently served to 58.
 - **Japan Airlines** suspends 34% of its domestic services in the first half of October, citing weakening demand.
 - **Oman Air** planning to fly to 16 international destinations from 1 October, with flights resuming to three countries in the network (UK, Germany and Turkey).
 - **Wizz Air Abu Dhabi** delays start ops from 1 to mid-October, citing travel restrictions.
- **North America**
 - **United Airlines** announces plans to add new services from the US to Ghana, Nigeria and South Africa in spring 2021.

4. Airport Information

- Amsterdam was the busiest airport with 793 Dep/Arr flights on 14 September, followed by Paris CDG (642), Frankfurt (563), iGA Istanbul Airport (503), London/Heathrow (489), Istanbul/Sabiha (459), Munich (440), Athens (424) and Madrid (424).
- From the biggest airports, only Oslo presented an increased compared to 2 weeks before (+3%). While iGA Istanbul Airport remained stable, all airports reported a decrease like Madrid (-16%), Barcelona (-14%), Paris/Orly (-14%), Athens (-13%), Paris CDG (-12%), Amsterdam (-9%), London Heathrow (-7%), Frankfurt (-6%) and Munich (-5%).

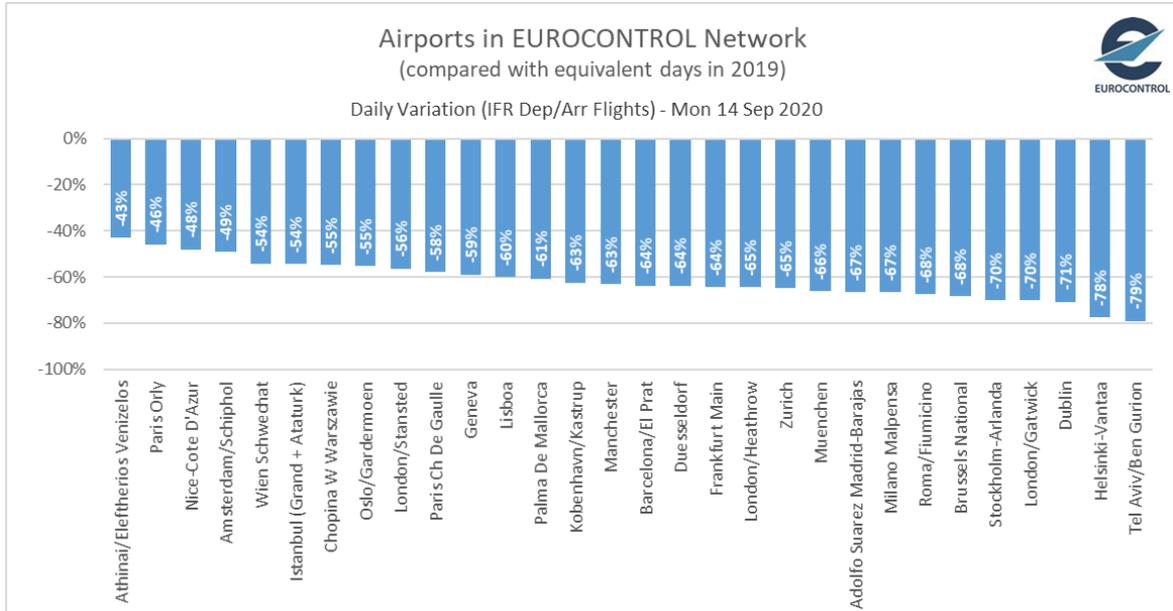


COVID19 Impact on European Air Traffic

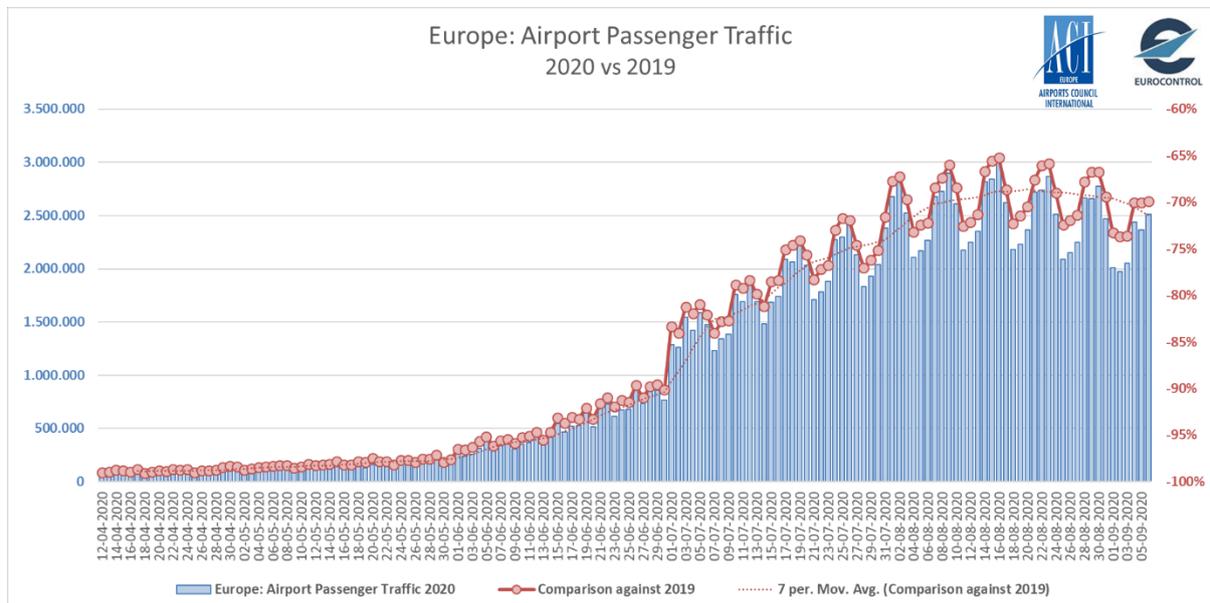
EUROCONTROL Comprehensive Assessment



- Compared to 2019, Athens operated at -43% on 14 September, Amsterdam (-49%), Paris CDG (-58%), Frankfurt (-64%), London Heathrow (-65%), Madrid (-67%) and Roma (-68%).



- According to **ACI**, passenger traffic has remained stable in the Summer at -69% over August compared to August 2019. On Sunday 6 September, ACI reported 2.5 million passengers compared to 8.3 on Sunday 8 September 2019 (i.e. -70%).



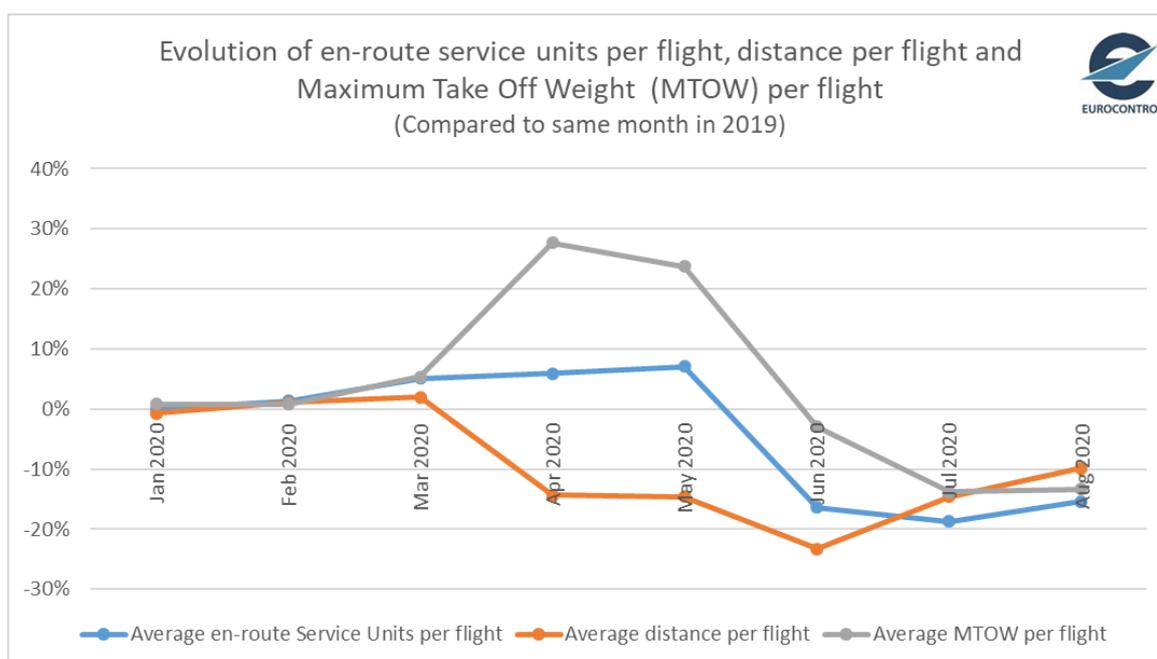
5. Economic, other factors

- **En-route air navigation charges:** After a bottom of 73M€ for April flights (i.e. -89% compared to plan), the amount billed for en-route charges went up to reach 330M€ for August flights (-60% compared to plan).

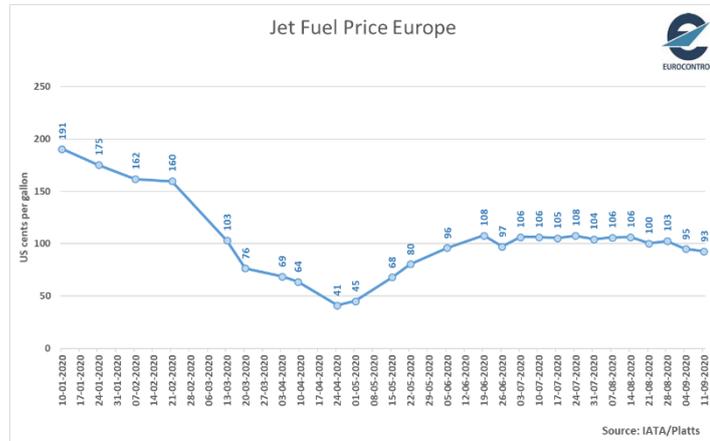
Route Charges	Mid-Feb. billing	Mid-Mar. billing	Mid-Apr. billing	Mid-May billing	Mid-Jun. billing	Mid-Jul. billing	Mid-Aug. billing	Mid-Sept. billing
Total net chargeable amounts (VAT excl.)	547 M€	516 M€	357 M€	73 M€	95 M€	120 M€	255M€	330M€

During the course of 2020, the average aircraft weight per flight (MTOW: Maximum Take-Off Weight) increased to 112 tons in April (+28% compared to April 2019) before reducing to 76 tons in August (i.e. -13% compared to August 2019).

During the same period, the average distance per flight decreased to reach a minimum of 830 km per flight in June (-23% compared to June 2019) before increasing to 1000 km per flight in August (-10% compared to August 2019).



- Fuel Price:** After having remained stable slightly above 100 cts/gal since the early July, fuel price decreased to 93cts/gal in the second week of September.



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.

