COVID19 Impact on European Air Traffic
EUROCONTROL Comprehensive Assessment

EUROCONTROL

Wednesday, 23 September 2020

Traffic Situation & Airlines Recovery

- 14,523 flights on Tuesday 22 September, (-8% with -860 flights vs. 8 Sept) reaching 43% of 2019 levels.
- Traffic 1-22 September is -54% below 2019 levels for the same period in line with the latest EUROCONTROL traffic scenarios published on 14 September. Current evolution indicates that the scenarios might be optimistic for October onward.
- Airlines are reporting very low forward booking rates until end of 2020 compared to normal.
- On 22 Sept, most airlines removed flights compared 8 Sept, in particular Wizz Air (-122), Volotea (-89), Vueling (-68), easyJet (-61), TUI Jet (-52) and Air France (-48).
- Ryanair remains the busiest carrier with 1,125 flights on Tuesday 22 September showing a decrease of -3% compared to 8 Sept (-32 flights). By decreasing its capacity by -1% (-3 flights), Turkish Airlines was the 2nd busiest operator with 575 flights, followed by easyJet (540 flights, -10%, -61 flights), Air France (507 flights, -9%, -48 flights), Lufthansa (438 flights, -4%, -20 flights) and KLM (417 flights, -5%, -22 flights).
- Compared to two weeks ago, LoganAir was the carrier which has most increased its capacities (+19 flights) followed by CHC Helikopter Service (+12) and NetJets (+9). All other airlines decreased their capacity: Wizz Air (-122), Volotea (-89), Vueling (-68), easyJet (-61), TUI Jet (-52) and Air France (-48). Almost all low cost and legacy carriers decreased their capacity.
- Compared to 2019, Wideroe operated at -20% on 22 Sept followed by Pegasus (-32%), KLM (-46%), Wizz Air (-52%), Ryanair (-56%), Air France (-56%), Turkish (-58%), easyJet (-71%), Lufthansa (-73%) and BA (-79%).
- Compared to 2019, dep/arr traffic in Spain was -69% on Tuesday 22 September, the UK (-63%), Italy (-62%), Germany (-59%), France (-55%) and Turkey (-50%).
- Bizz Aviation recovery has been losing pace since early Sept (reaching -16% vs. 2019) while all-cargo remains stable at 2019 levels (+2%). Low-cost flights recorded a faster recovery during the summer but decreased early Sept with -60%. Charter flights are continuously increasing reaching -44%.

Traffic Flows & Country Pairs

- The intra-Europe flow is the main flow with 12,256 flights on 22 Sept (-7% on 8 Sept). Top traffic flows with Europe were with "Middle-East" (408 flights, -0%) followed by "North-Atlantic" (394 flights, +11%), "Other Europe" (349 flights, -4%), "Asia/Pacific" (314 flights, +8%) and "North-Africa" (205 flights, -15%).
- Intra-Europe flow is at -55% compared to 2019 while all other flows are at -70%.
- Flows within Sweden showed the highest increase with +19% followed by the UK (+13%) and Germany (+10%). All other domestic flows decreased like in Greece (-25%), Italy (-16%), Spain Continental (-8%), France (-4%) and Turkey (-3%).
- The busiest non domestic flows was the flow UK-Spain (203 flights) which decreased by -9% on 8 Sept.

Airport Information

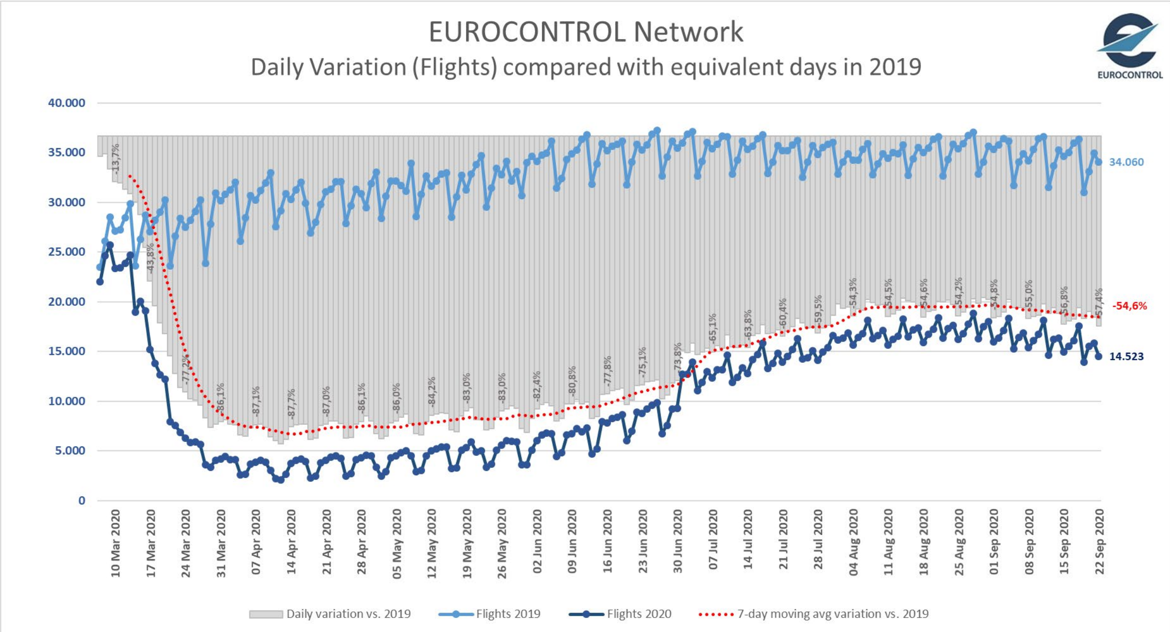
- After having reached -69% in August compared to August 2019, passenger traffic started to decrease since mid-August to reach 2.5 million passengers on Sunday 13 September (-70% compared to 2019).
- Amsterdam was the busiest airport with 662 Dep/Arr flights on 22 Sept (-8% over the last 2 weeks), followed by Paris CDG (558, -6%), Frankfurt (450, -9%), Istanbul/Sabiha (435, +0%), London/Heathrow (414, +3%), iGA Istanbul Airport (400, -1%), Munich (381, -8%), Oslo (378, -3%), Antalya (343, -4%) and Madrid (340, -12%).
- From the top airports, only London/Heathrow presented an increased compared to 2 weeks before (+3%). Most airports reported a decrease like Athens (-17%), Madrid (-12%), Frankfurt (-9%), Munich (-8%), Amsterdam (-8%) and Paris CDG (-6%).
- Compared to 2019, Athens operated at -54% on 22 September, Amsterdam (-56%), Paris CDG (-63%), London Heathrow (-69%), Frankfurt (-71%), Roma (-72%) and Madrid (-73%).

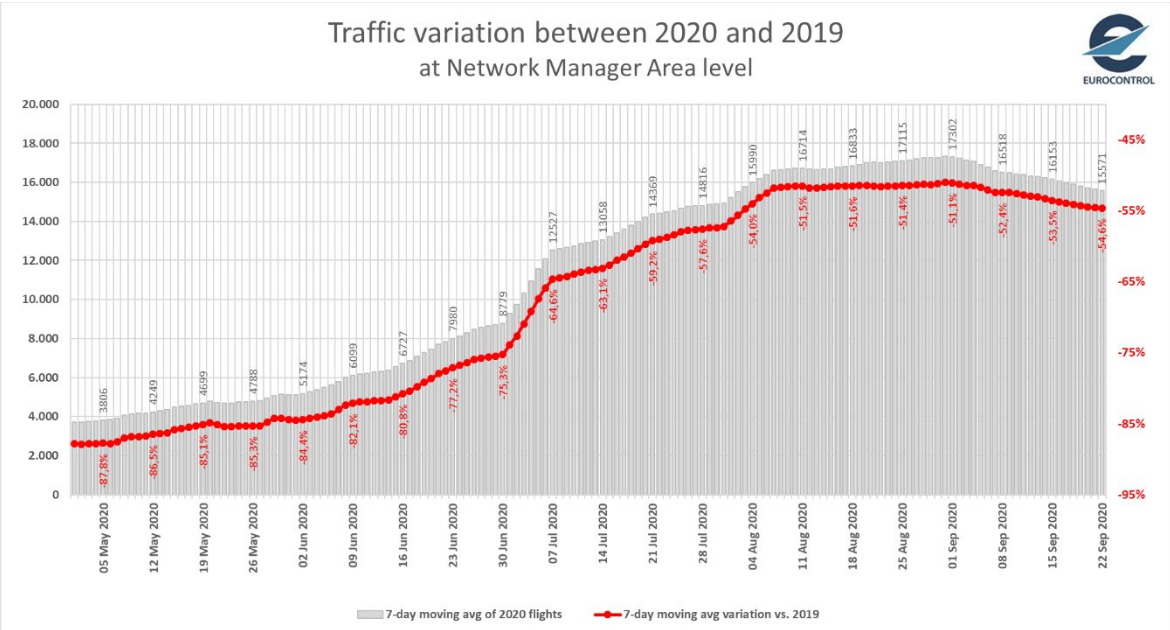
Economic

- **En-route air navigation charges:** Over the first 8 months of 2020, EUROCONTROL has billed €2.3billion of en-route charges which represents -57% compared to the same period in 2019. Over the same period, IFR flights were down by -54% compared to 2019.
- **Fuel price:** Fuel price reached 100cts/gal in the third week of September.

1. Traffic Situation and Airlines Recovery

- 14,523 flights on Tuesday 22 September, (-8% with -860 flights compared to Tuesday 8 September). This is 43% of 2019 traffic levels. Based on a 7-day moving average, the decrease is -54.6% compared to 2019 which is now degrading since early September due to the increase of States' restrictions and the removal of flights by almost all airlines, with WizzAir removing the highest number of flights(-122 flights).
- 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.





News from key worldwide organizations:

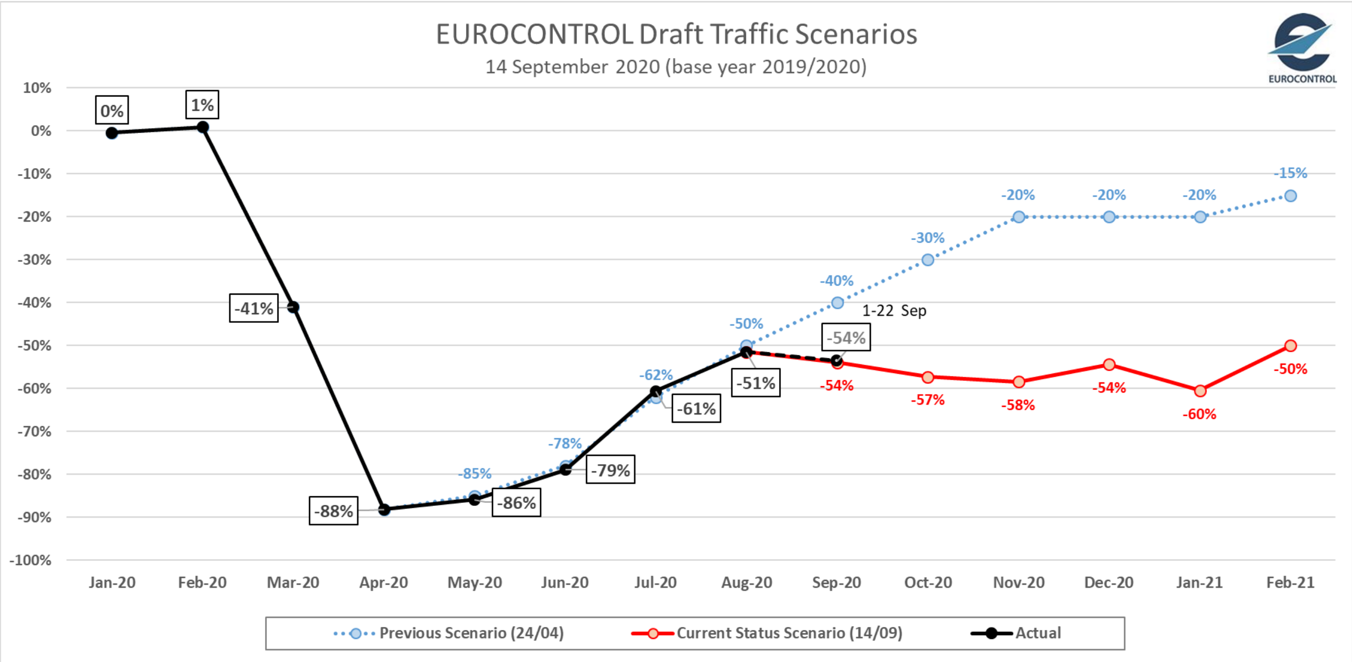
- **IATA** reports ticketing globally for December 2020 is at 21% of December 2019 levels.
- **OAG** reports global seat capacity remains down 56%.
- **ICAO Secretary General** announced global passenger traffic down 69% year-on-year Jan-August with global losses to the industry between $350 and $400 billion.

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.

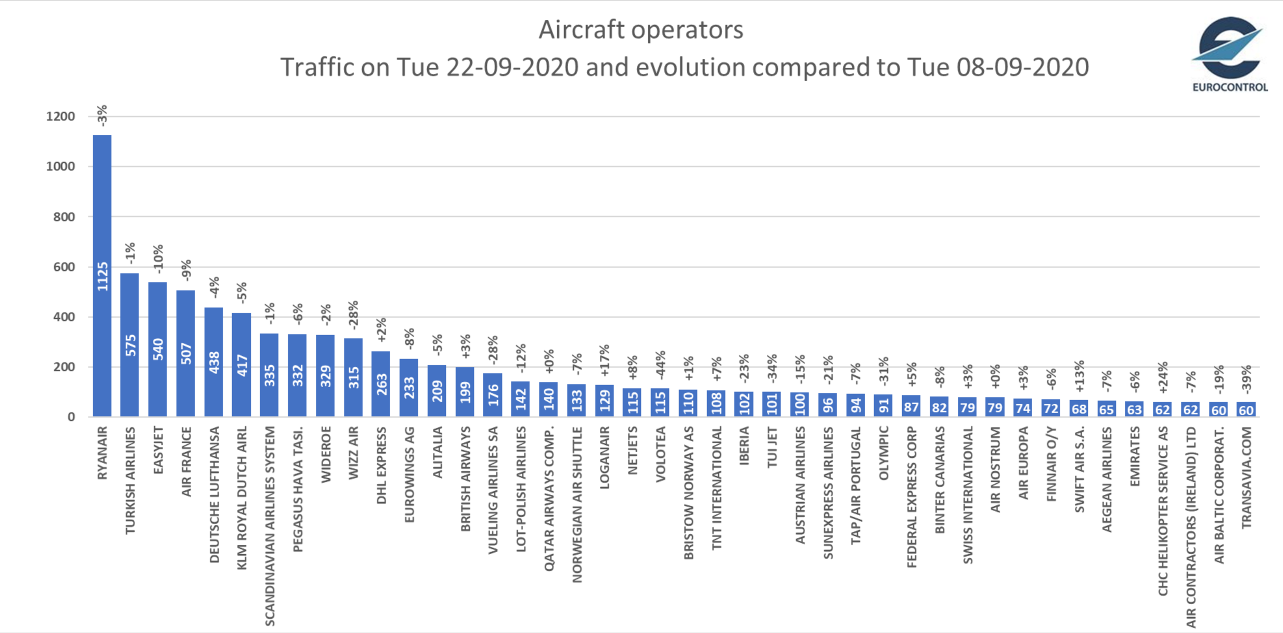
- For the month of September (until Tuesday 22 September), the traffic is in line with the traffic scenario with -54%. Current evolution indicates that the scenarios might be optimistic for October onward.

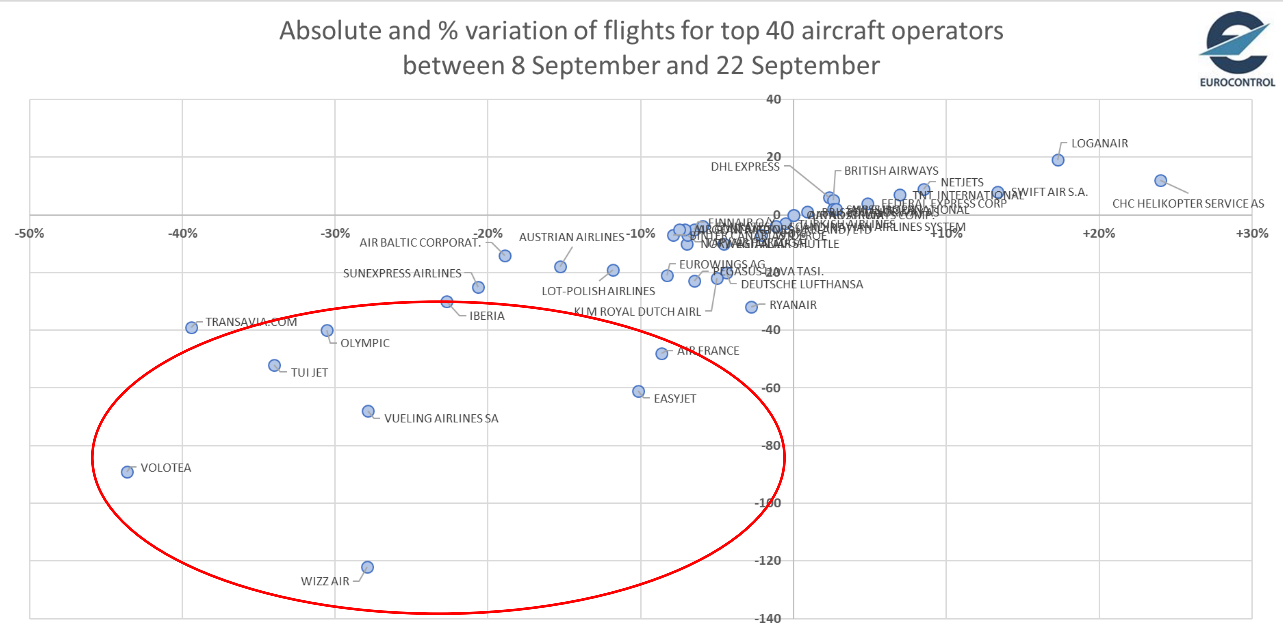


European Airlines:

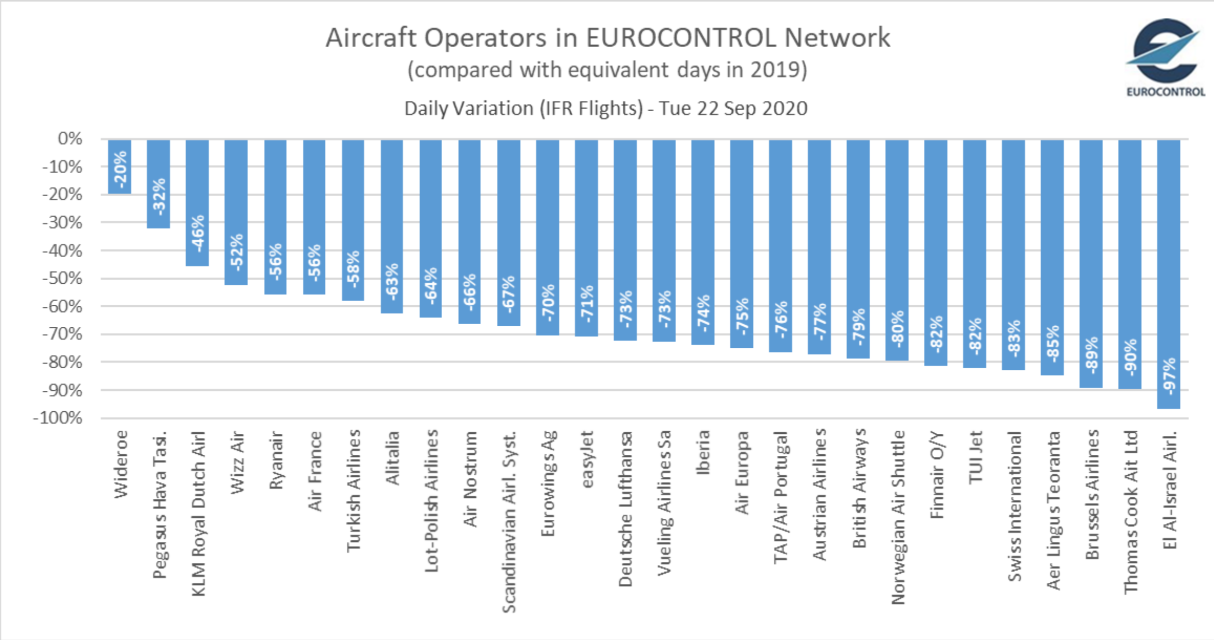
- Ryanair was, by far, the airline with the highest number of flights with 1,125 flights on Tuesday 22 September showing a decrease of -3% compared to Tuesday 8 September (-32 flights). By decreasing its capacity by -1% (-3 flights), Turkish Airlines was the 2nd busiest operator with 575 flights, followed by easyJet (540 flights, -10%, -61 flights), Air France (507 flights, -9%, -48 flights), Lufthansa (438 flights, -4%, -20 flights), KLM (417 flights, -5%, -22 flights) and SAS (335 flights, -1%, -4 flights).

- Compared to two weeks ago, LoganAir was the carrier which has most increased its capacities (+19 flights) followed by CHC Helikopter Service (+12) and NetJets (+9). All other airlines decreased their capacity: Wizz Air (-122), Volotea (-89), Vueling (-68), easyJet (-61), TUI Jet (-52) and Air France (-48).





- Compared to 2019, Wideroe operated at -20% on Tuesday 22 September followed by Pegasus (-32%), KLM (-46%), Wizz Air (-52%), Ryanair (-56%), Air France (-56%), Turkish (-58%), easyJet (-71%), Lufthansa (-73%) and British Airways (-79%).

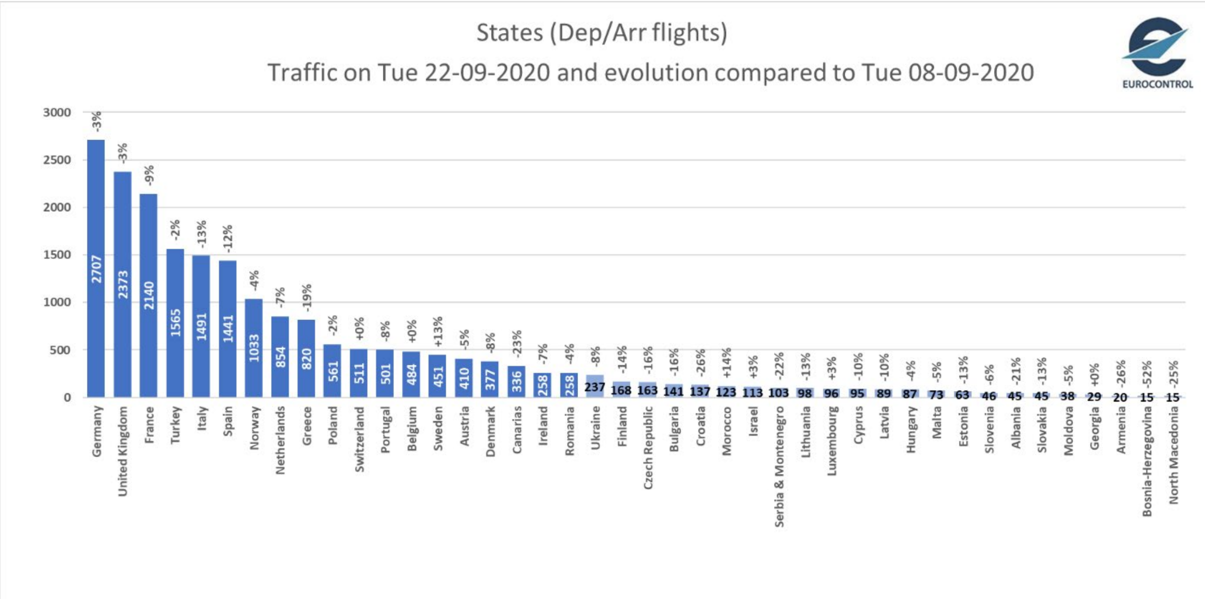


News from key European airlines:

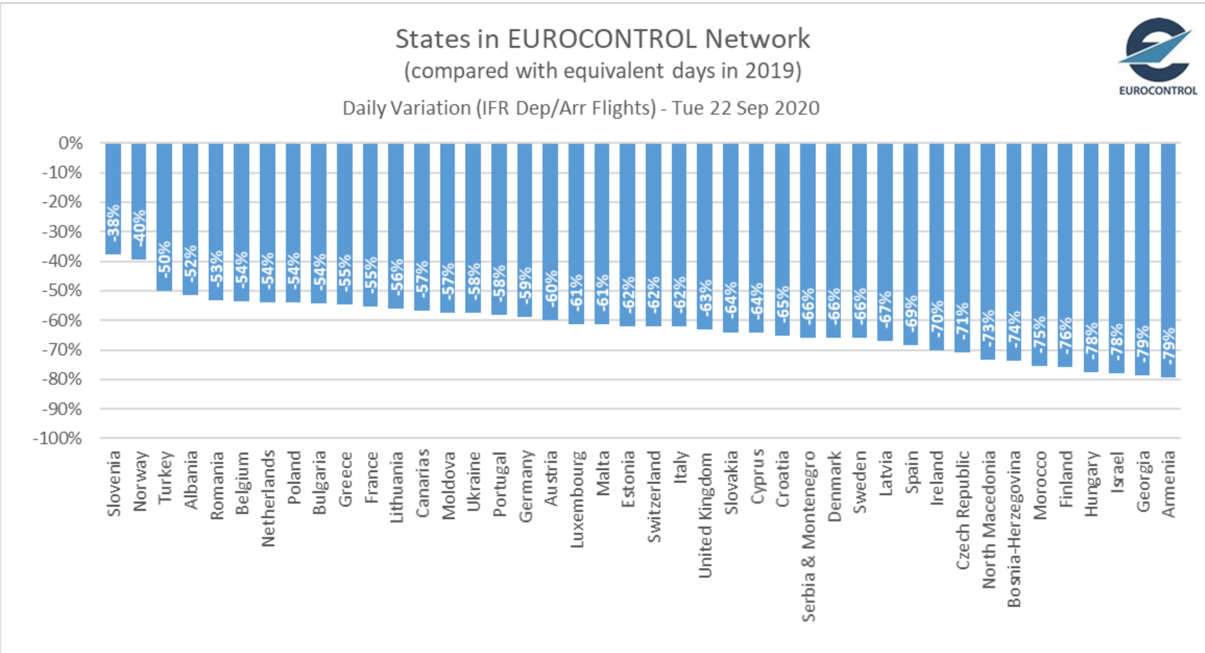
- **airBaltic** resumes flights from Riga to Split and Dubrovnik in week 13/09; number of employees reduced by 40% with 97% of these due to return to work within a year.
- **Alitalia** suspends services from Rome to Podgorica and Belgrade until March 2021.
- **British Airways** to resume London-Bahrain service in October; increases frequency on the London Heathrow – Islamabad to daily.
- **Croatia Airlines** announces a reduction of 67% in passengers for the first 8 months of 2020; announces 15 international destinations for October.
- **DHL Express** investing €170 million in new hub in Paris Charles de Gaulle, due to be operational in Oct 2021.
- **Edelweiss** restarting Zurich-Maldives route 2ce a week as of 2609.
- **Eurowings** will integrate about 95% of Ryanair’s schedule from Dusseldorf airport adding flights to Balearic Islands, Canary Islands, southern Spain and Greece; restarts Frankfurt-Windhoek service.
- **Finnair** is suspending a number of European routes in October.
- **Lauda Europe** will be increasing its current fleet of 3 A320s to 30 A320s over the coming weeks.
- **Lufthansa Group** reporting forward bookings for October at less than 10% of 2019 levels; announces plans to store an additional 8 A380 and 10 A340-600.
- **Norwegian CEO** says the airline doesn’t have the ‘financial muscle’ to make it through the winter and is working on a restructuring plan.
- **Royal Air Maroc** will operate a temporary service from Tangier-Barcelona until 06/10; closes bookings on 45 international services until March 2021.
- **Rwandair** resuming London-Brussels-Kigali service from 03/10.
- **Ryanair** announces October capacity to be 40% of 2019 levels, targeting load factor of 70%.
- **SAS** resumes Copenhagen-Washington Dulles service.
- **TAP** announces it will maintain suspension of Cancun and Cape Town services until 2021.
- **Transavia** suspends flights between Netherlands and Greece for Autumn
- **Transavia France** launching 5 new domestic French routes as of November.
- **Wizz** postpones launch of St Petersburg base until later in the year; suspends two services from Ohrid.

States

- Based on traffic levels, the Top 6 busiest States[1] is stable with Germany with 2707 flights on Tuesday 22 September (-3% over 2 weeks) followed by the UK (2373, -3%), France (2140, -9%), Turkey (1565, -2%), Italy (1491, -13%), Spain (1441, -12%), Norway (1033, -4%), Netherlands (854, -7%), Greece (820, -19%)and Poland (561, -2%). To be noted the +13% increase of Sweden.



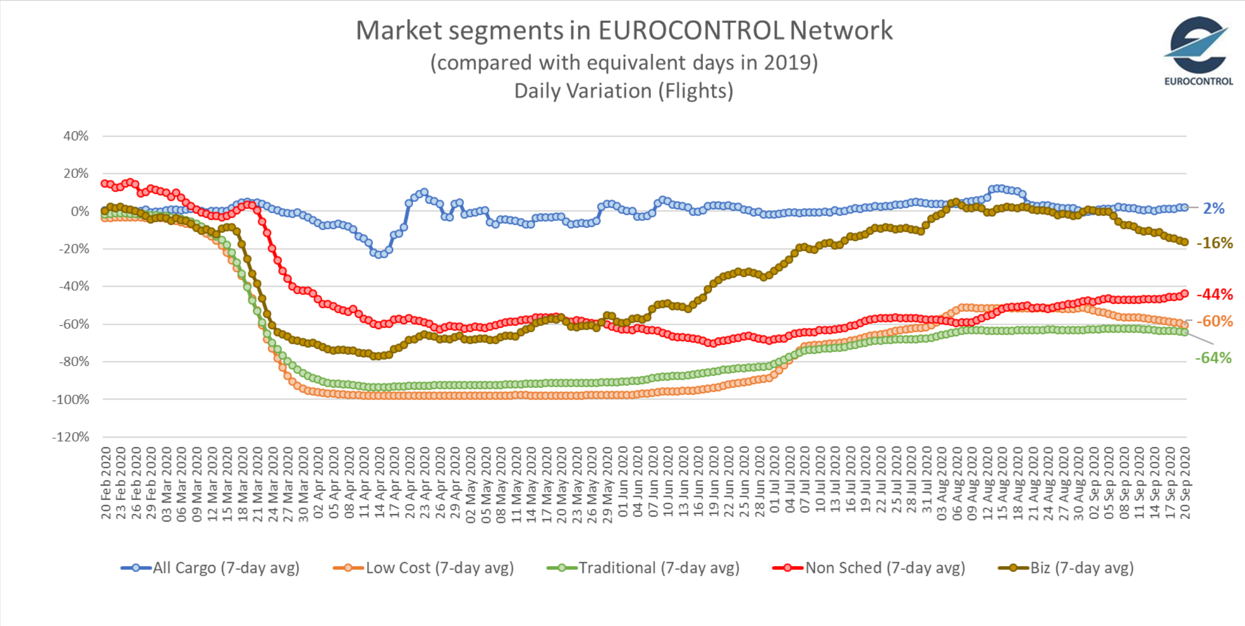
- Compared to 2019, Departure/Arrival traffic in Spain was -69% on Tuesday 22 September, the UK (-63%), Italy (-62%), Germany (-59%), France (-55%) and Turkey (-50%).



[1] excluding overflights.

Market Segments:

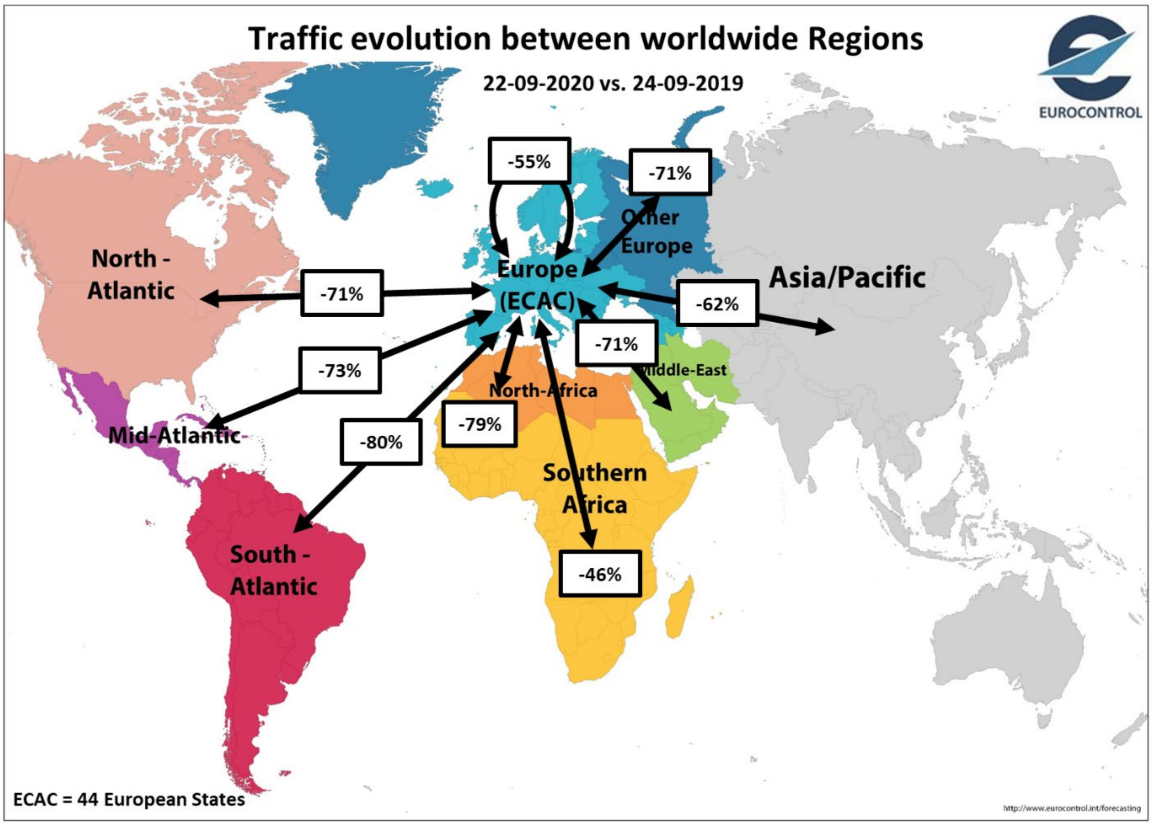
- Business Aviation recovery has been losing pace since early September (reaching -16% vs. 2019) while all-cargo remains stable at 2019 levels (+2%).
- Low-cost flights recorded a faster recovery during the summer but decreased early September with -60% vs 2019. Charter flights are continuously increasing reaching -44%.



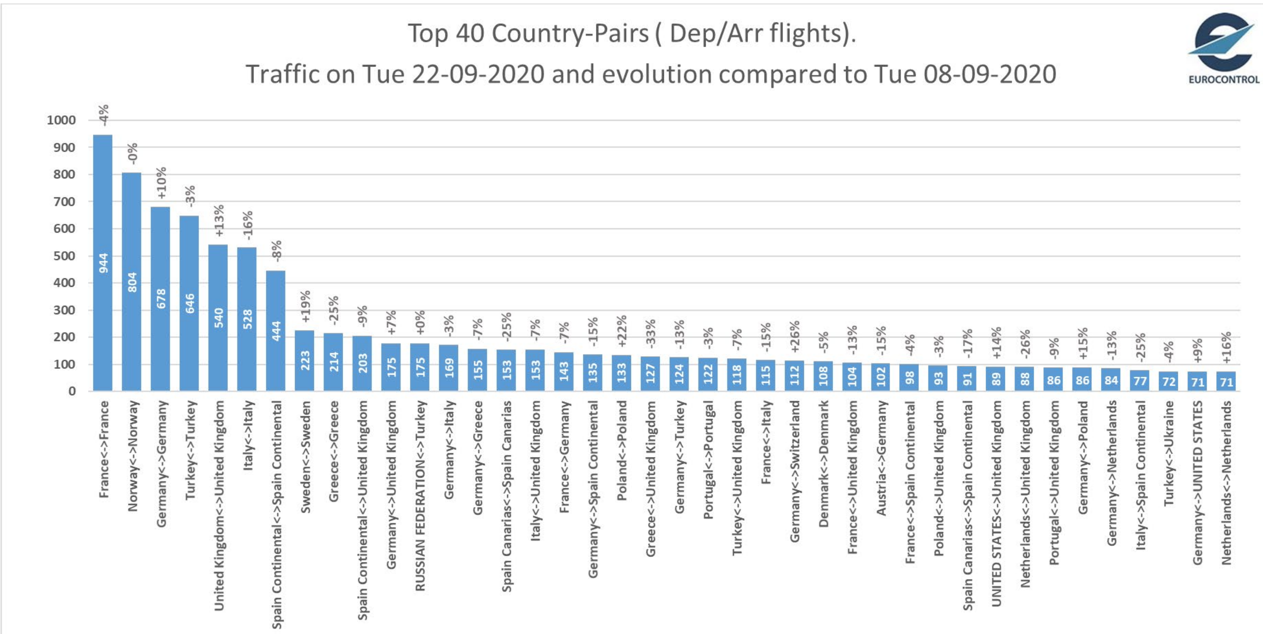
2. Traffic Flows & Country Pairs

- The main traffic flow is the intra-Europe flow with 12,256 flights on Tuesday 22 September, which is decreasing (-7%) compared to Tuesday 8 September.
- The top traffic flows with Europe were with "Middle-East" (408 flights, -0%) followed by "North-Atlantic" (394 flights, +11%), "Other Europe" (349 flights, -4%), "Asia/Pacific" (314 flights, +8%) and "North-Africa" (205 flights, -15%).
- Intra-Europe flights are still at -55% compared to 2019 while all other flows are at -70%.

REGION	08-09-2020	22-09-2020	%	vs. 2019
Intra-Europe	**13.134**	**12.256**	***-7%***	***-55%***
Europe<->Asia/Pacific	291	314	*+8%*	*-62%*
Europe<->Mid-Atlantic	37	37	*+0%*	*-73%*
Europe<->Middle-East	410	408	*-0%*	*-71%*
Europe<->North Atlantic	356	394	*+11%*	*-71%*
Europe<->North-Africa	242	205	*-15%*	*-79%*
Europe<->Other Europe	364	349	*-4%*	*-71%*
Europe<->South-Atlantic	42	38	*-10%*	*-80%*
Europe<->Southern Africa	146	166	*+14%*	*-46%*
Non Intra-Europe	**1.888**	**1.911**	***+1%***	***-70%***



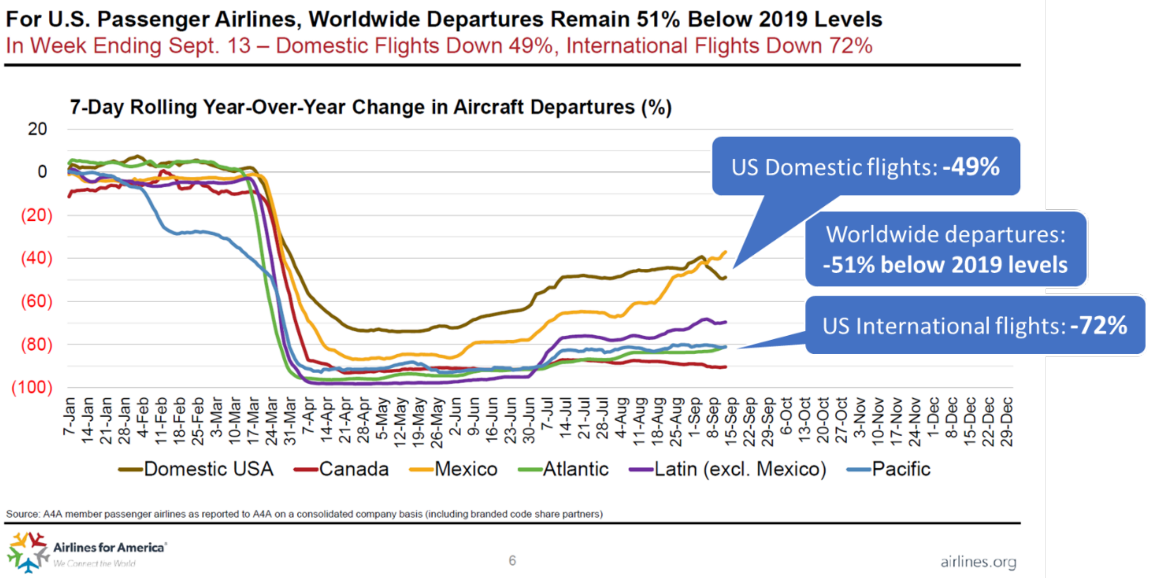
- Domestic flows are the most active flows (i.e. 9 of the top 10 flows are domestic). From the top flows, flows within Sweden showed the highest increase with +19% followed by the UK (+13%) and Germany (+10%). All other domestic flows decreased like in Greece (-25%), Italy (-16%), Spain Continental (-8%), France (-4%) and Turkey (-3%).



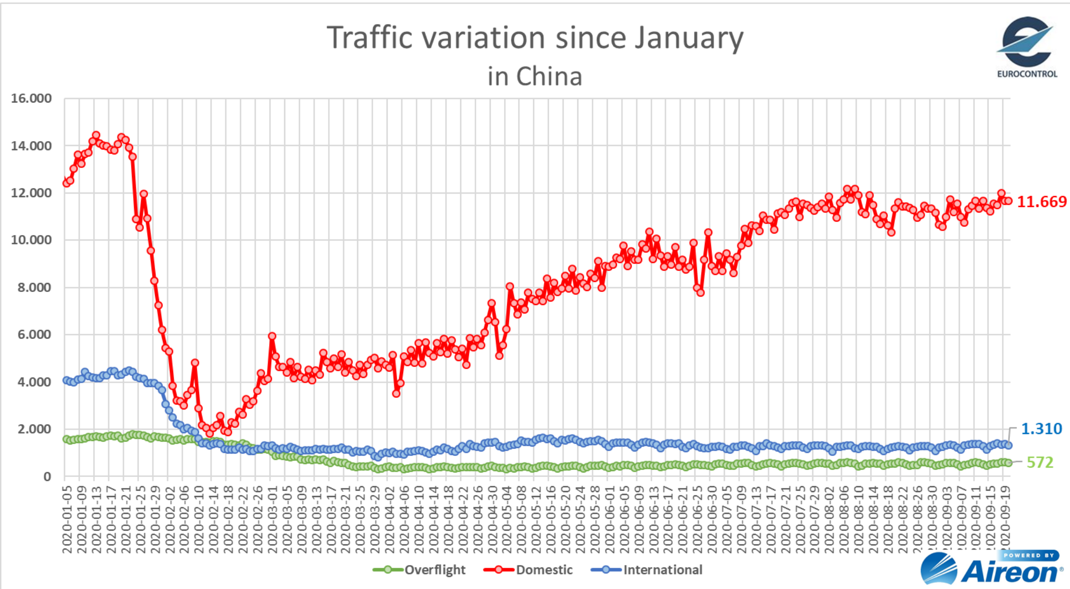
- The busiest non domestic flows was the flow between the UK and Spain (203 flights) and decreased by -9% compared to 2 weeks ago.

3. Situation outside Europe

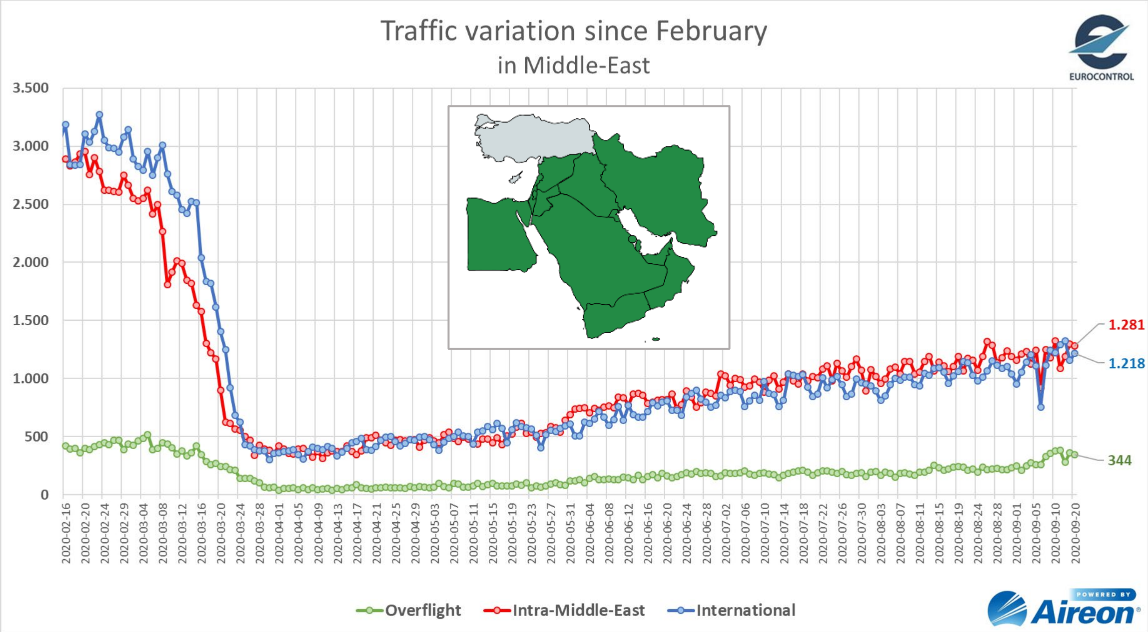
- **United-States:**
  - After a significant drop of traffic in the US by the end of March, US domestic traffic has improved since early June with a noticeable step change on 1st July. Since 1st of September, the domestic flow slightly decreased to reach -49% of 2019 on 13 September. International flows slightly increased to -72% except flows to/from Mexico (around -38%).
  - In week ending September 13, U.S. airlines passenger volumes remained 65% below year-ago levels with Domestic Air Travel Down 63% and International Down 84%.
  - The domestic U.S. Load Factor averaged 58% in most recent week, versus 81% a year earlier.



- **China:**
  - Chinese domestic flights are now stable with 11,669 flights very close to pre-COVID, 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 1,310 flights, i.e. still 70% below pre-COVID levels). The same is true for overflights (572).



- **Middle East:**
    - Since the beginning of April, Intra-Middle-East traffic has been increasing slowly reaching 1,281 flights on 20 September. International traffic has been recovering at the same levels as domestic from early April but is slightly lagging behind (1,218 flights). Overflights have started to increase since the second week of September.

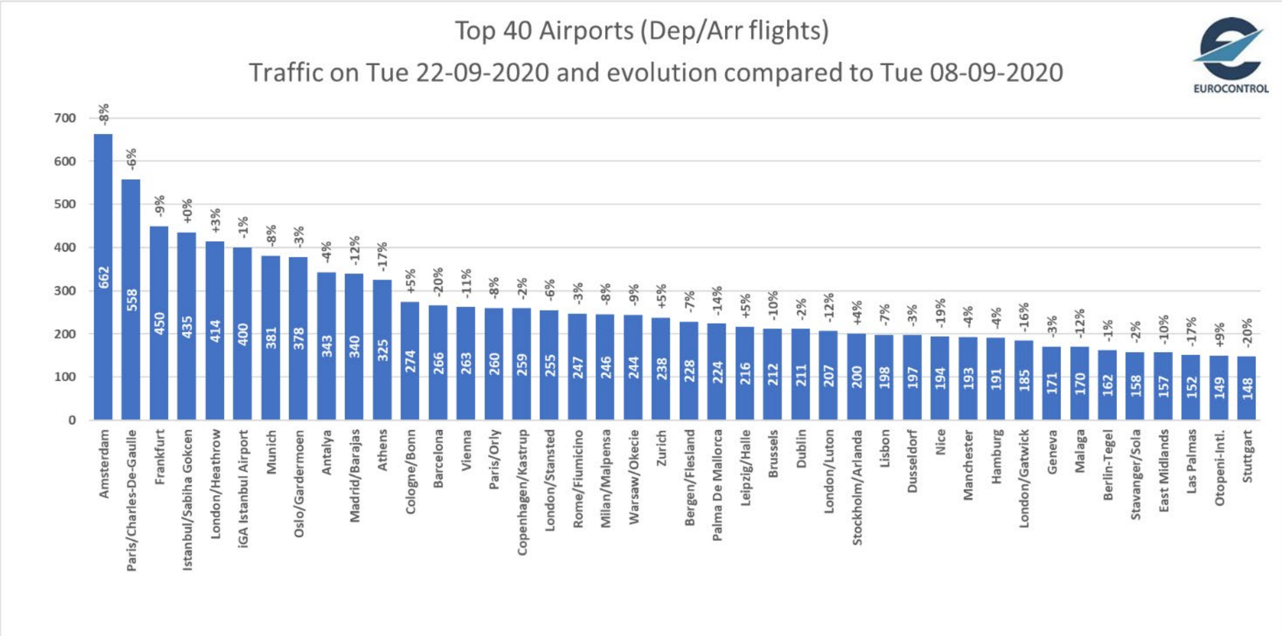


News and Plans for key worldwide airlines:

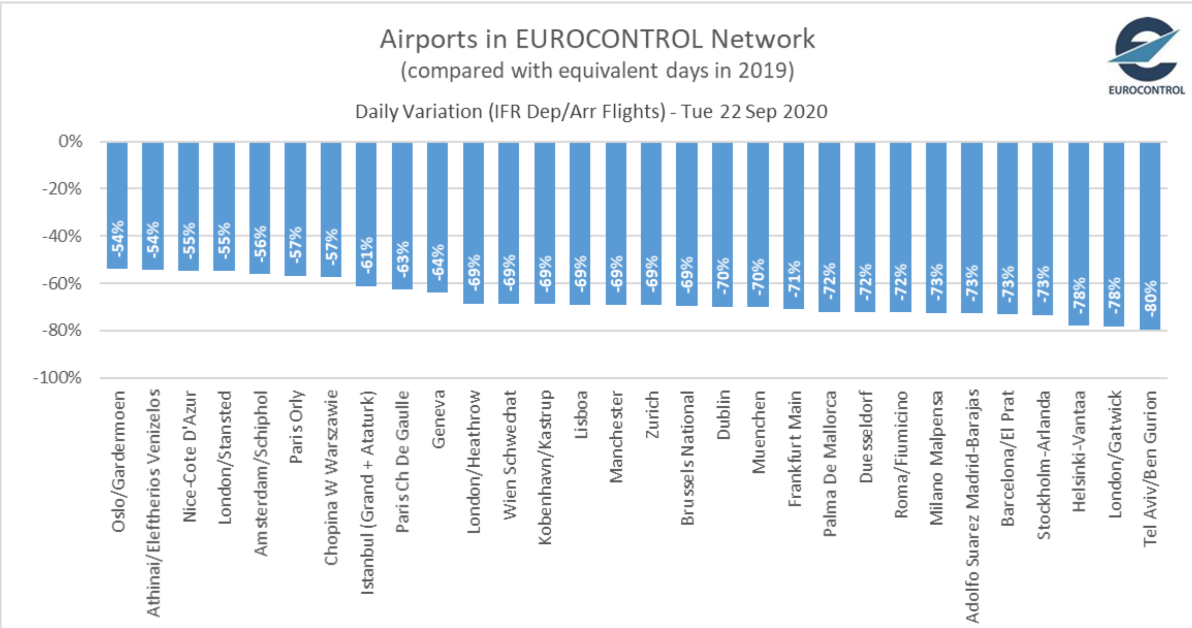
- **Africa**
    - **South Africa** to reopen for international travel as of 01/10.
- **Asia/Middle East**
    - **Cathay Pacific** to ground 40% of passenger fleet for foreseeable future, expects cash burn to continue.
    - **Emirates** deploys A380 on 6 routes from end October – end November; deploys an A380 on the Dubai-Moscow route as of 18/09 until mid-October.
- **North America**
    - **Delta Airlines** announces that international capacity for Q3 will be down 80% while domestic capacity will be down 50%.40% of mainline fleet are parked.
    - **Fedex** has been approved to operate between the USA and South Africa.

4. Airport Information

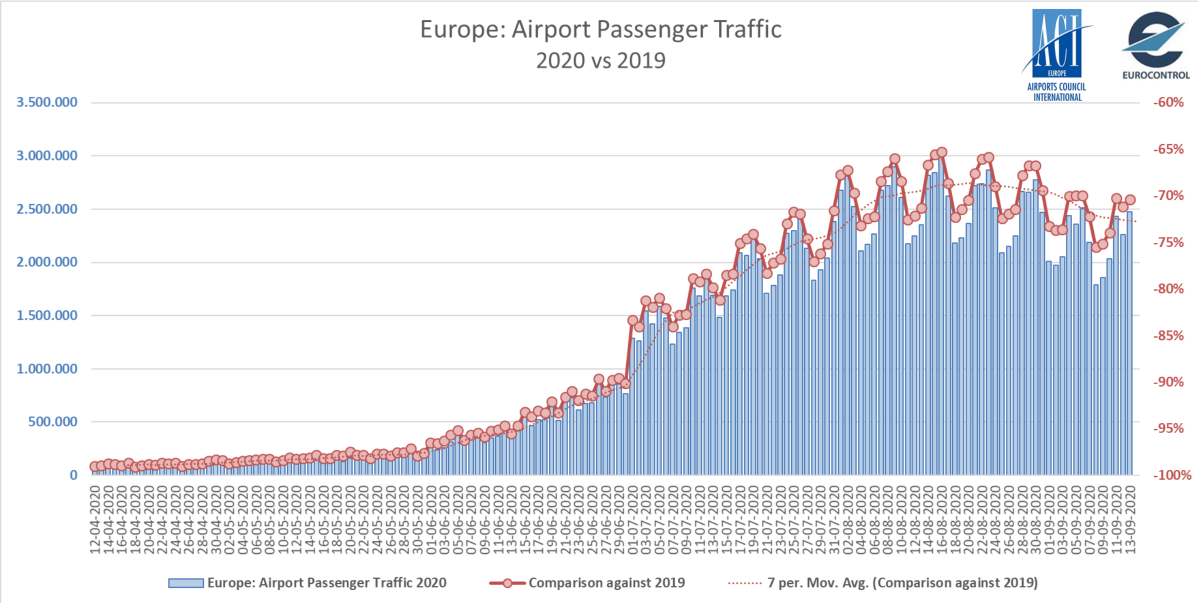
- Amsterdam was the busiest airport with 662 Dep/Arr flights on 22 September (-8% over the last 2 weeks), followed by Paris CDG (558, -6%), Frankfurt (450, -9%), Istanbul/Sabiha (435, +0%), London/Heathrow (414, +3%), iGA Istanbul Airport (400, -1%), Munich (381, -8%), Oslo (378, -3%), Antalya (343, -4%) and Madrid (340, -12%).
- From the top airports, only London/Heathrow presented an increased compared to 2 weeks before (+3%). Most airports reported a decrease like Athens (-17%), Madrid (-12%), Frankfurt (-9%), Munich (-8%), Amsterdam (-8%) and Paris CDG (-6%).



- Compared to 2019, Athens operated at -54% on 22 September, Amsterdam (-56%), Paris CDG (-63%), London Heathrow (-69%), Frankfurt (-71%), Roma (-72%) and Madrid (-73%).

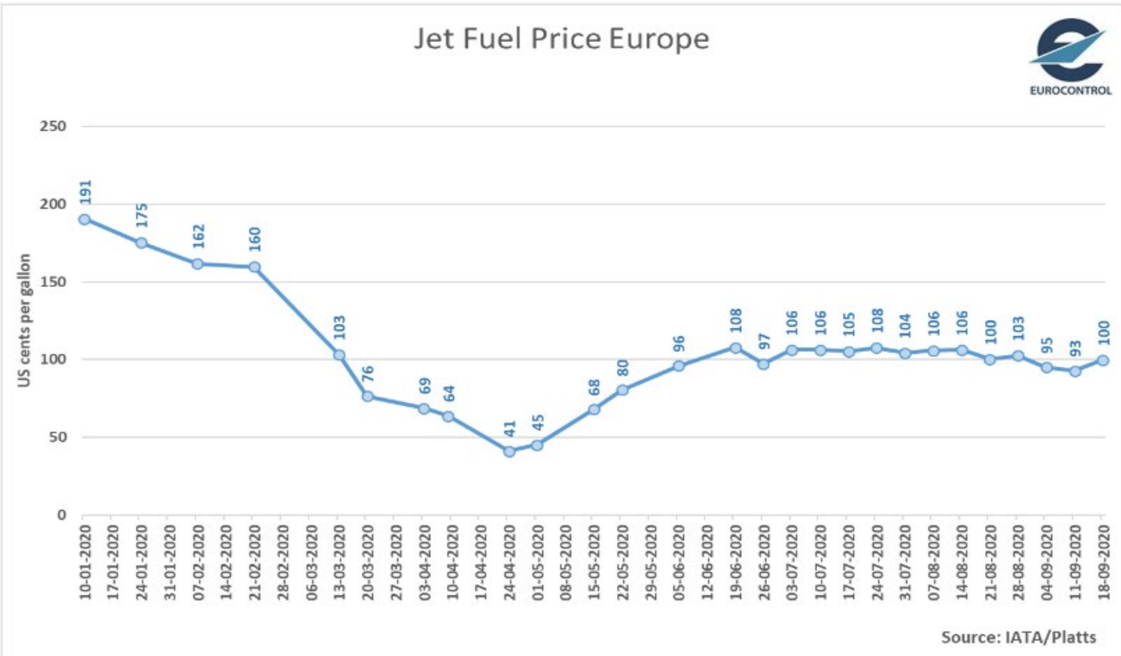


- According to **ACI**, passenger traffic has remained stable in the Summer at -69% over August compared to August 2019. On Sunday 13 September, ACI reported 2.5 million passengers compared to 8.4 on Sunday 15 September 2019 (i.e. -70%).



5. Economic, other factors

- **En-route air navigation charges:** Over the first 8 months of 2020, EUROCONTROL has billed €2.3billion of en-route charges which represents -57% compared to the same period in 2019. Over the same period, IFR flights were down by -54% compared to 2019.
- **Fuel Price:** After having remained stable slightly above 100 cts/gal since early July, fuel price decreased to 93cts/gal in the second week of September but got back to 100cts/gal during the third week.



To further assist you in your analysis, EUROCONTROL provides the following additional information on a daily basis (daily updates at approximately 7:00 CET for the first item and 12:00 CET for the second) 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.