

Wednesday, 30 September 2020

### Traffic Situation & Airlines Recovery

- **14,231 flights on Tuesday 29 September, (-5% with -721 flights vs. 15 Sept) reaching 43% of 2019 levels.**
- Since early September, traffic started to decrease but at a slower pace over the last week.
- **Traffic 1-29 September is -54% below 2019 levels** for the same period in line with the latest EUROCONTROL traffic scenarios published on 14 September.
- Airlines are reporting very low forward booking rates until end of 2020 compared to normal.
- On 29 Sept, most airlines removed flights compared 15 Sept, in particular Wizz Air (-90), Volotea (-53), Air France (-53), Eurowings (-41), TUI Jet (-35), KLM (-32) and easyJet (-26). However, this was compensated by Bristow Norway (+85), Ryanair (+37), Alitalia (+13) and Turkish Airlines (+10).
- Ryanair remains the busiest carrier with 1,136 flights on Tuesday 29 Sept showing an increase of +3% compared to 15 Sept (+37 flights). By increasing its capacity by +2% (+10 flights), Turkish Airlines was the 2<sup>nd</sup> busiest operator with 596 flights, followed by easyJet (538 flights, -5%, -26 flights), Air France (485 flights, -10%, 53 flights), Lufthansa (423 flights, -3%, -14 flights) and KLM (382 flights, -8%, -32 flights).
- Compared to two weeks ago, Bristow Norway increased its capacity the most (+85 flights) followed by Ryanair (+37), ENAC (+22), Alitalia (+13) and Turkish Airlines (+10). Many big airlines decreased their capacity: Wizz Air (-90), Volotea (-53), Air France (-53), Eurowings (-41), TUI Jet (-35), KLM (-32) and easyJet (-26).
- Compared to 2019, Widerøe operated at -17% on Tuesday 29 Sept followed by Pegasus (-33%), KLM (-49%), Ryanair (-54%), Turkish Airlines (-57%), Air France (-58%), Wizz Air (-58%), Lufthansa (-73%) and BA (-78%).
- Compared to 2019, dep/arr traffic in Spain was -68% on Tuesday 29 September, the UK (-62%), Germany (-61%), Italy (-59%), France (-53%) and Turkey (-50%).
- Business Aviation recovery has been losing pace since early Sept (reaching -17% 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 slightly decreasing since mid-September reaching -46%.

### Traffic Flows & Country Pairs

- The intra-Europe flow is the main flow with 11,880 flights on 29 Sept (-6% on 15 Sept). Top traffic flows with Europe were with “Middle-East” (454 flights, +4%) followed by “North-Atlantic” (407 flights, +0%), “Other Europe” (359 flights, +1%), “Asia/Pacific” (312 flights, +3%) and “North-Africa” (209 flights, -14%).
- Intra-Europe flow is at -54% compared to 2019 while all other flows are at -69%.
- Flows within Norway showed the highest increase with +7% followed by the UK (+4%) and France (+2%). All other domestic flows decreased like in Germany (-19%), Greece (-18%), Turkey (-4%) and Sweden (-13%).
- The busiest non domestic flows were UK-Spain (213 flights, +2%) followed by Russia-Turkey (197 flights, +5%).

### Situation outside Europe

- Compared to pre-Covid, domestic traffic in the US is 50%; in China it has almost reached its pre-Covid level, while in Middle East it shows a continuous but slow growth reaching around 40%.

### Airport Information

- **After having reached -69% in August compared to August 2019, passenger traffic started to decrease since mid-August to reach 2.4 million passengers on Sunday 20 September (-71% compared to 2019).**
- Amsterdam was the busiest airport with 615 Dep/Arr flights on 29 Sept (-13% over the last 2 weeks), followed by Paris CDG (553, -10%), Frankfurt (444, -4%), Istanbul/Sabiha (436, +0%), İGA Istanbul Airport (423, +5%), London/Heathrow (399, -2%), Munich (359, -10%), Oslo (356, -2%), Antalya (345, -8%), Athens (341, -10%) and Madrid (335, -8%).
- From the top airports, only İGA Istanbul Airport presented an increase compared to 2 weeks before (+5%). Most airports reported a decrease like Amsterdam (-13%), Paris CDG (-10%), Munich (-10%), Athens (-10%), Antalya (-8%), Madrid (-8%), Frankfurt (-4%) and London Heathrow (-2%).
- Compared to 2019, Athens operated at -46% on 29 September, Amsterdam (-59%), Paris CDG (-64%), London Heathrow (-68%), Frankfurt (-71%), Roma (-71%) and Madrid (-73%).

### Economic

- **Fuel price:** Fuel price reached 98cts/gal on 25 September 2020.

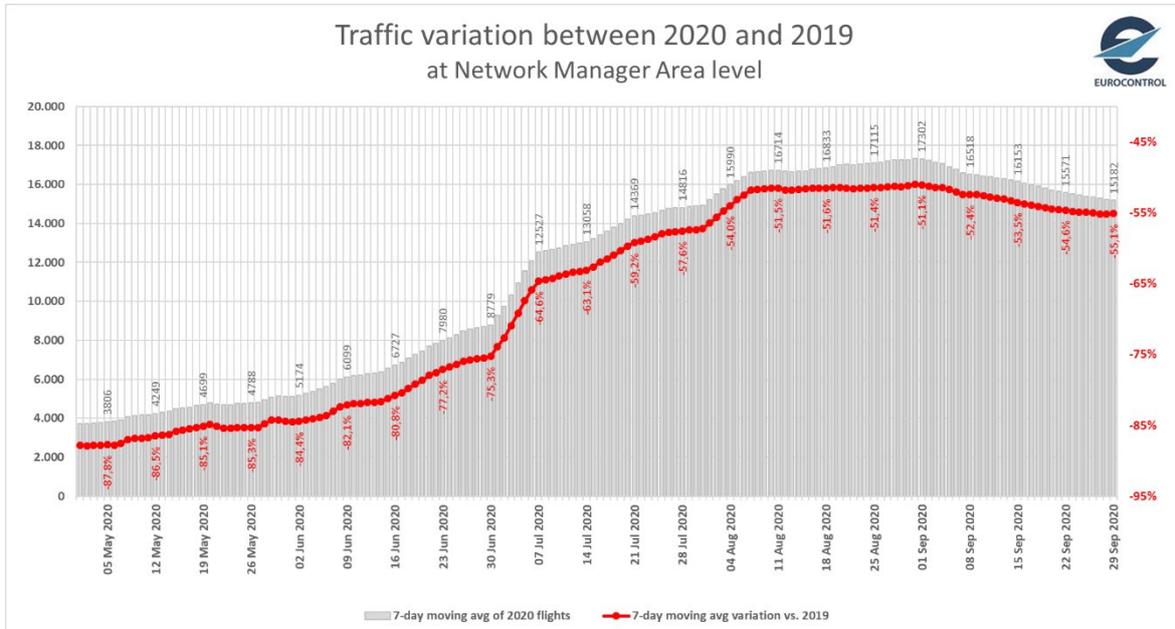
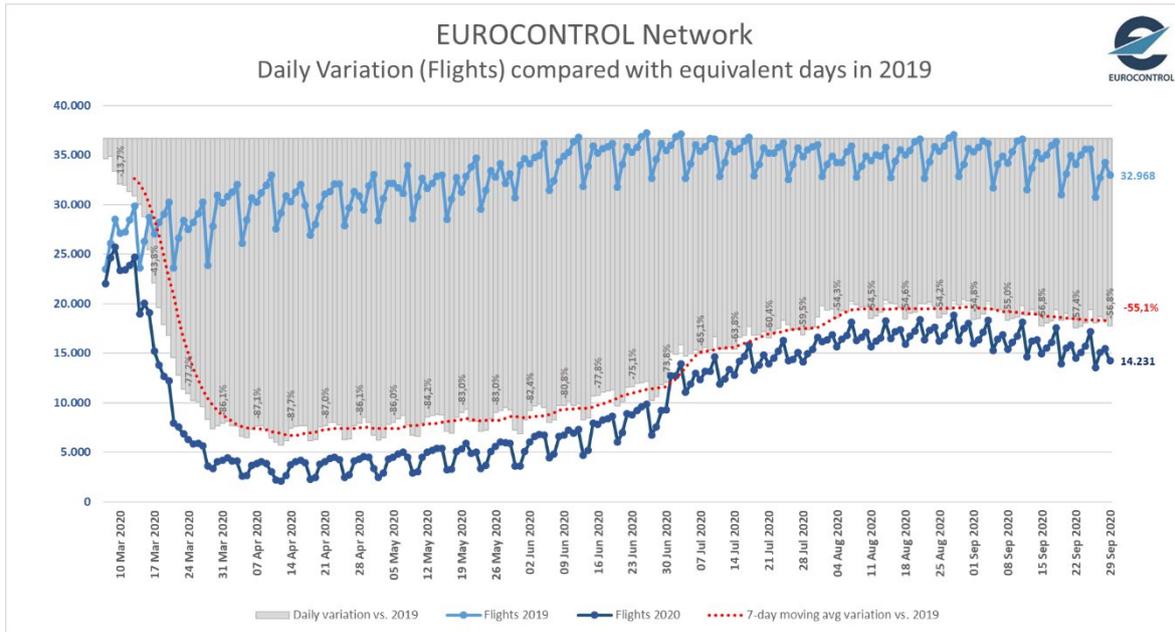
# COVID19 Impact on European Air Traffic

## EUROCONTROL Comprehensive Assessment



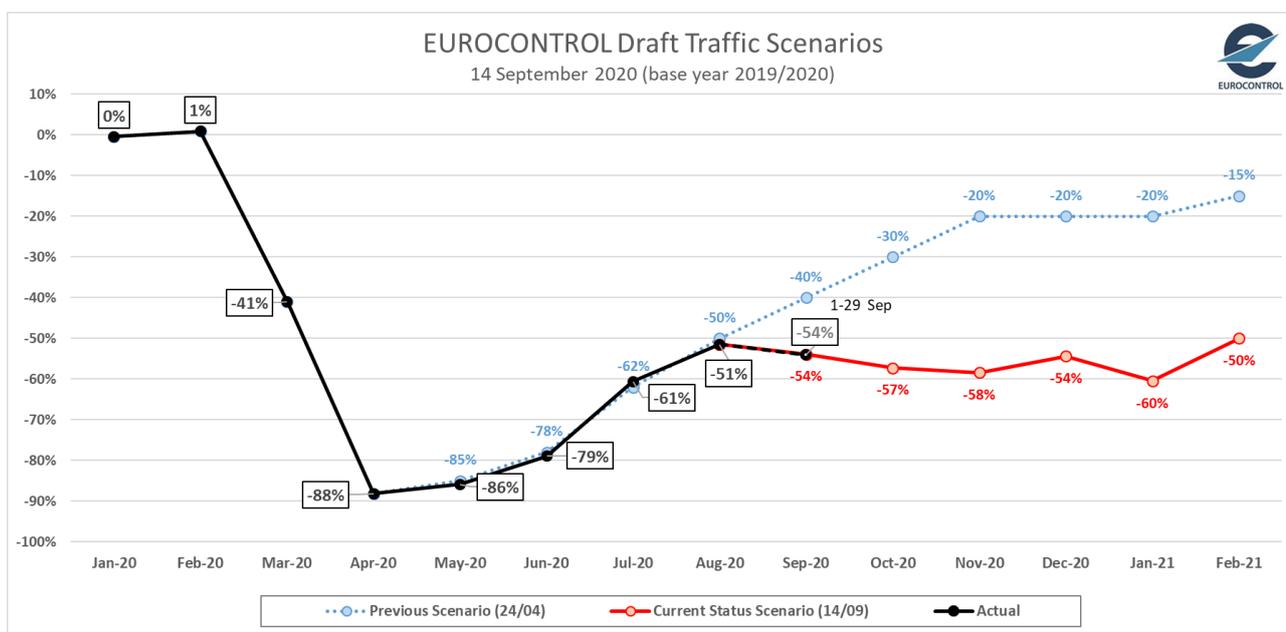
### 1. Traffic Situation and Airlines Recovery

- 14,231 flights on Tuesday 29 September, (-5% with -721 flights compared to Tuesday 15 September). This is 43% of 2019 traffic levels. Based on a 7-day moving average, the decrease is -55.1% compared to 2019 which is now degrading since early September (due to the increase of States' restrictions) but at a slower pace over the last week.
- 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.



### 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 29 September), the traffic is fully in line with the traffic scenario with -54%. Current evolution indicates that the scenarios might be optimistic for October onward.

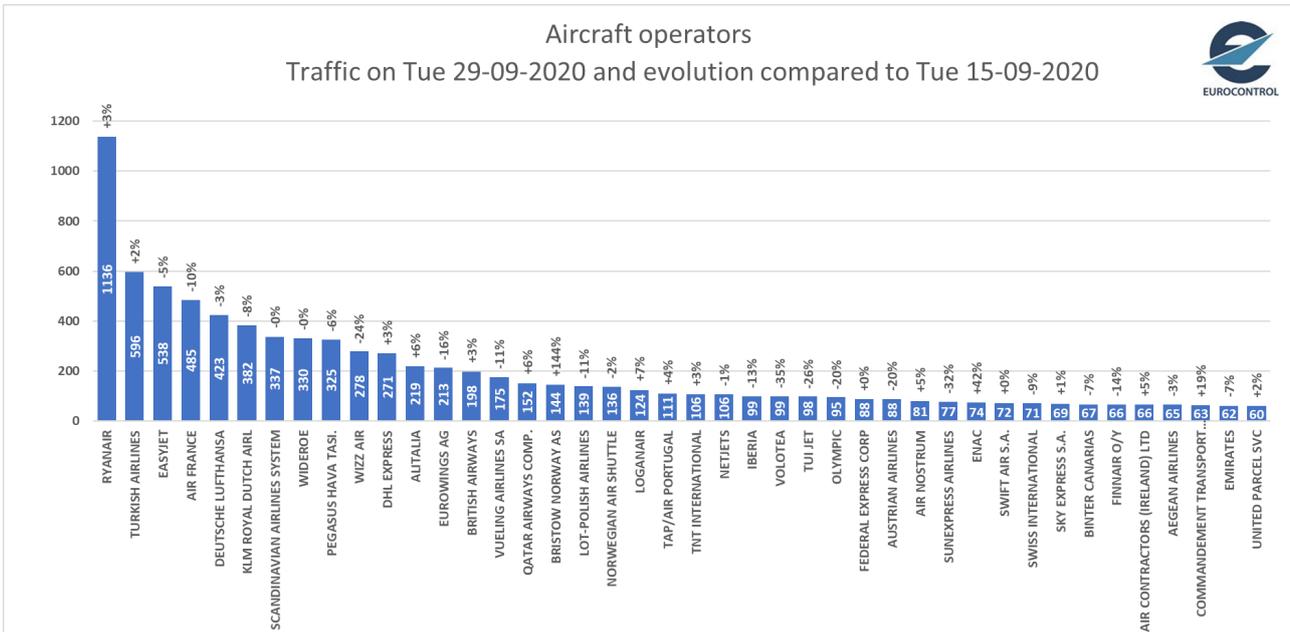


### European Airlines:

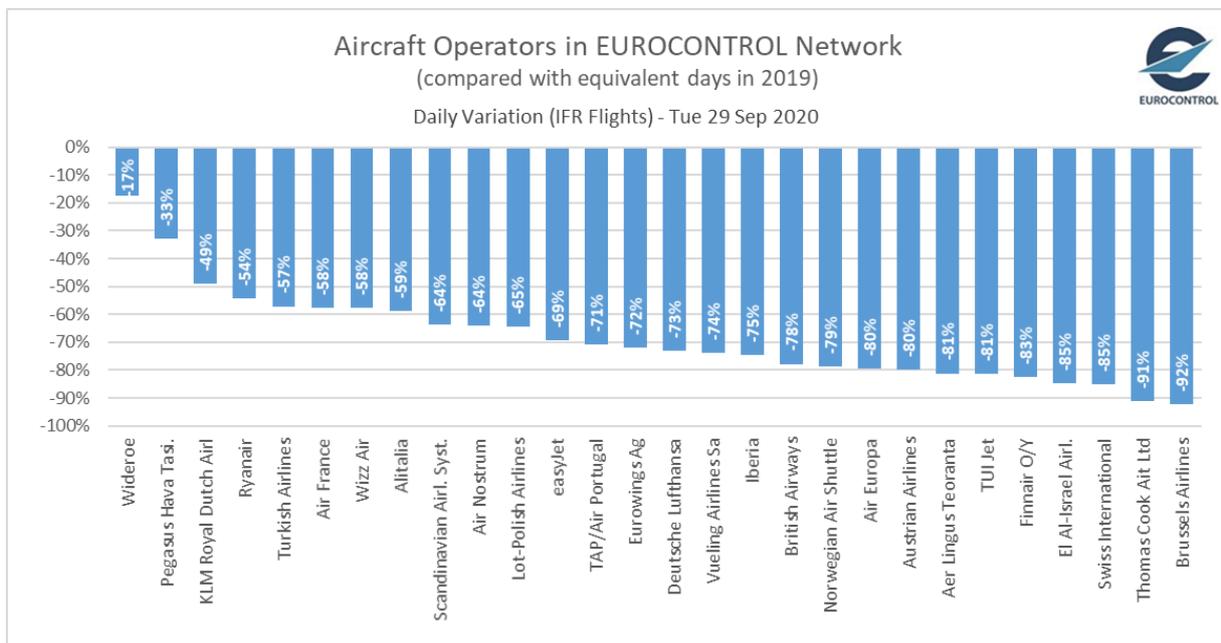
- Ryanair was, by far, the airline with the highest number of flights with 1,136 flights on Tuesday 29 September showing an increase of +3% compared to Tuesday 15 September (+37 flights). By increasing its capacity by +2% (+10 flights), Turkish Airlines was the 2<sup>nd</sup> busiest operator with 596 flights, followed by easyJet (538 flights, -5%, -26 flights), Air France (485 flights, -10%, 53 flights), Lufthansa (423 flights, -3%, -14 flights), KLM (382 flights, -8%, -32 flights) and SAS (337 flights, -0%, -1 flights).
- Compared to two weeks ago, Bristow Norway was the carrier which has most increased its capacities (+85 flights) followed by Ryanair (+37), ENAC (+22), Alitalia (+13) and Turkish Airlines (+10). Many big airlines decreased their capacity: Wizz Air (-90), Volotea (-53), Air France (-53), Eurowings (-41), TUI Jet (-35), KLM (-32) and easyJet (-26).

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- Compared to 2019, Widerøe operated at -17% on Tuesday 29 September followed by Pegasus (-33%), KLM (-49%), Ryanair (-54%), Turkish Airlines (-57%), Air France (-58%), Wizz Air (-58%), Lufthansa (-73%) and British Airways (-78%).



### News from key European airlines:

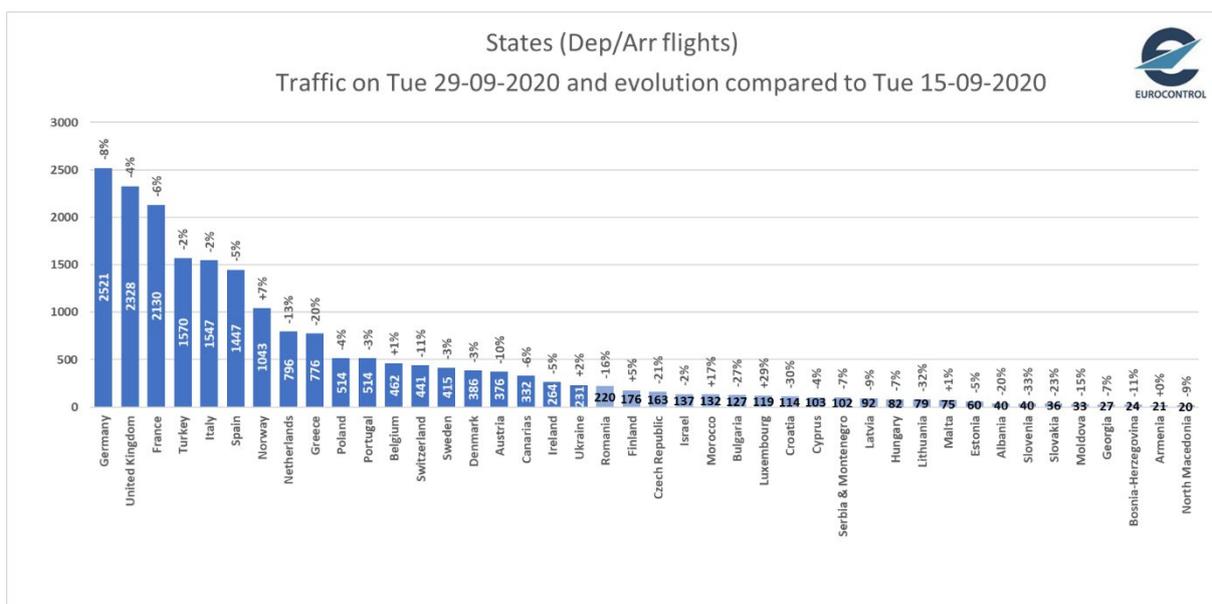
- Alitalia** planning several frequency reductions/route cancellations for the winter but resuming services to Sao Paulo and Buenos Aires in December.
- Air France-KLM** expecting 25% decline in business traffic in 2021 (compared to pre-coronavirus levels).
- Air France** to operate 50% of its 2019 schedule in November/December.
- Eurowings** suspends plans to resume Munich-Bangkok service.



- **KLM** to suspend service to Milan Linate and to resume service to Edmonton; overall plans to operate at 55% of ASK capacity levels on its European network in November 2020 and 59% across its combined network; delays launch to Riyadh service to December.
- **Jet2** planning to add frequency on UK-Turkey routes.
- **Lufthansa** plans to offer COVID-19 antigen testing.
- **Lufthansa/DFS** have developed a more efficient flight profile concept to take advantage of the lower number of flights.
- **Norwegian** in discussions on financing with the Norwegian government.
- **Ryanair** to open a new base at Paris Beauvais in December, its fourth base in France with 2 aircraft and 32 routes. To launch Vilnius-Leeds service, waiving change fee for bookings in October/November.
- **SAS** to suspend service to Faroe Islands over winter. Converting €200m of debt to equity and raising €1.1bn of new equity; resuming Copenhagen-Shanghai services but suspending some routes to US.
- **SWISS** planning winter capacity of only 30% of 2019/20 levels, with A220s replacing some A320s; resuming service to Johannesburg.
- **TAP Air Portugal**, in addition to deferring new aircraft deliveries, is considering the sale of up to eight aircraft as well as the early return of some leased aircraft and the potential sale of aircraft under financial lease; it operated at 24% of capacity in August.
- **Vueling** to launch new domestic routes in France (Orly to Marseille, Montpellier & Brest).
- **Wizz Air** expects to operate at 50% of capacity in October and does not expect this to rise until restrictions are eased. Postpones launch of operations at Abu Dhabi and additional services to St Petersburg to resume services between Ukraine and Bratislava if Slovakia remains on Ukraine's green list.

### States

- Based on traffic levels, the Top 6 busiest States<sup>1</sup> is stable with Germany with 2521 flights on Tuesday 29 September (-8% over 2 weeks) followed by the UK (2328, -4%), France (2130, -6%), Turkey (1570, -2%), Italy (1547, -2%), Spain (1447, -5%), Norway (1043, +7%), Netherlands (796, -13%), Greece (776, -20%), Poland (514, -4%), Portugal (514, -3%), Belgium (462, +1%), Switzerland (441, -11%), Sweden (415, -3%), Denmark (386, -3%), Austria (376, -10%), Canarias (332, -6%), Ireland (264, -5%), Ukraine (231, +2%), Romania (220, -16%), Finland (176, +5%), Czech Republic (163, -21%), Israel (137, -2%), Morocco (132, +17%), Bulgaria (127, -27%), Luxembourg (119, +29%), Croatia (114, -30%), Cyprus (103, -4%), Serbia & Montenegro (102, -7%), Latvia (92, -9%), Hungary (82, -7%), Lithuania (79, -32%), Malta (75, +1%), Estonia (60, -5%), Albania (40, -20%), Slovenia (40, -33%), Slovakia (36, -23%), Moldova (35, -15%), Georgia (27, -7%), Bosnia-Herzegovina (24, -11%), Armenia (21, +0%), North Macedonia (20, -9%)



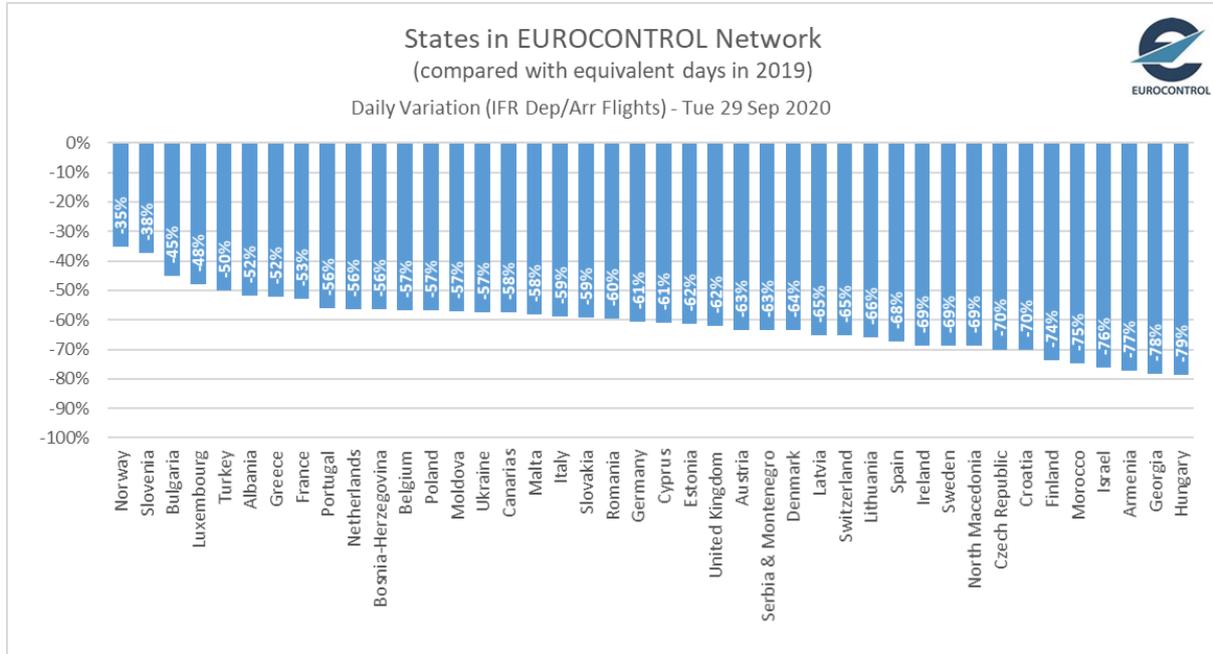
<sup>1</sup> excluding overflights.

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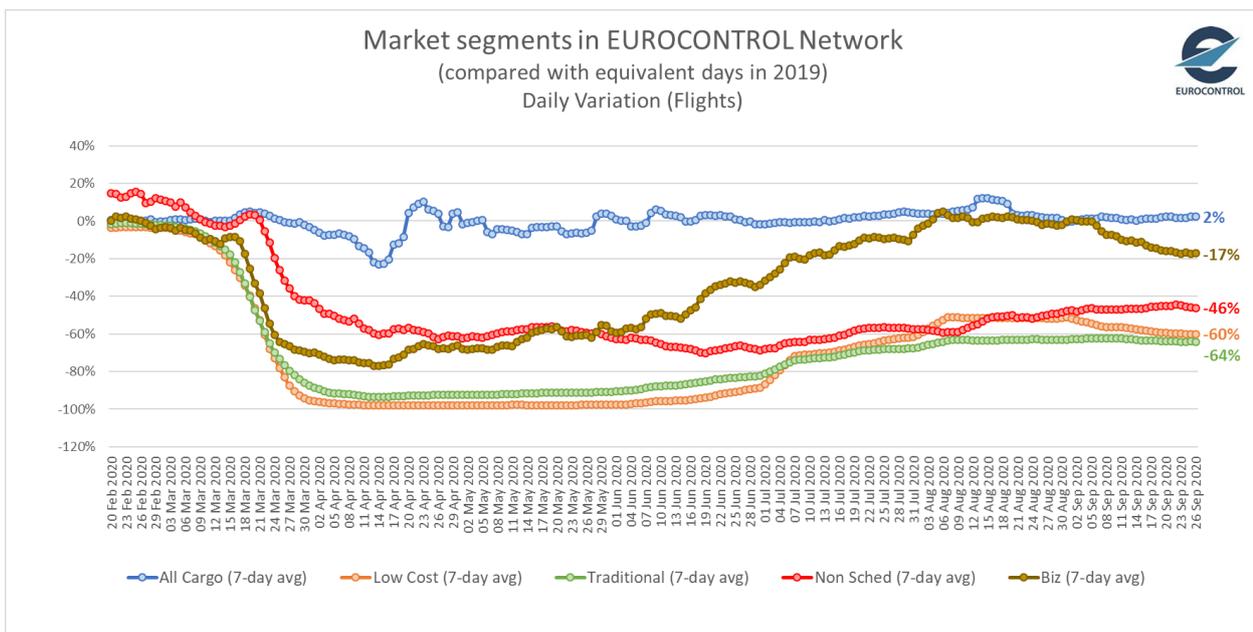


- Compared to 2019, Departure/Arrival traffic in Spain was -68% on Tuesday 29 September, the UK (-62%), Germany (-61%), Italy (-59%), France (-53%) and Turkey (-50%).



### Market Segments:

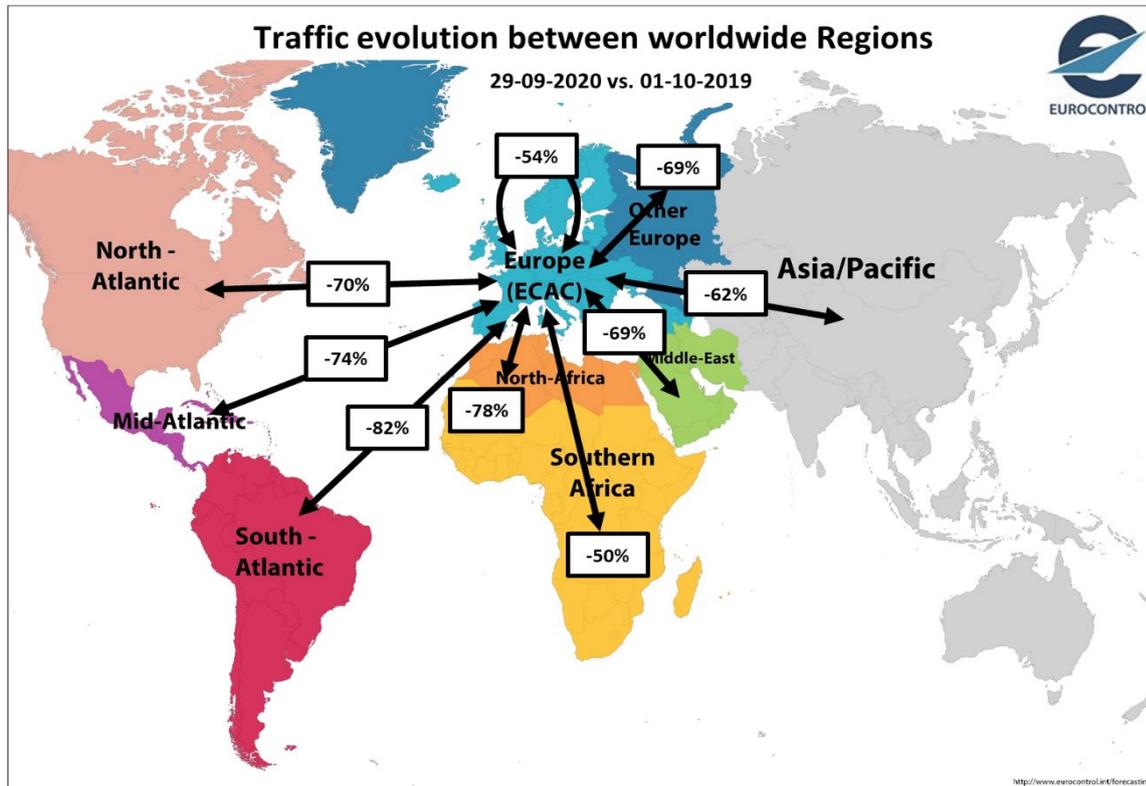
- Business Aviation recovery has been losing pace since early September (reaching -17% vs. 2019) while all-cargo remains stable at 2019 levels (+2%).
- Low-cost flights recorded a faster recovery during the summer but decreased early September with -60% vs 2019. Charter flights are slightly decreasing since mid-September reaching -46%.



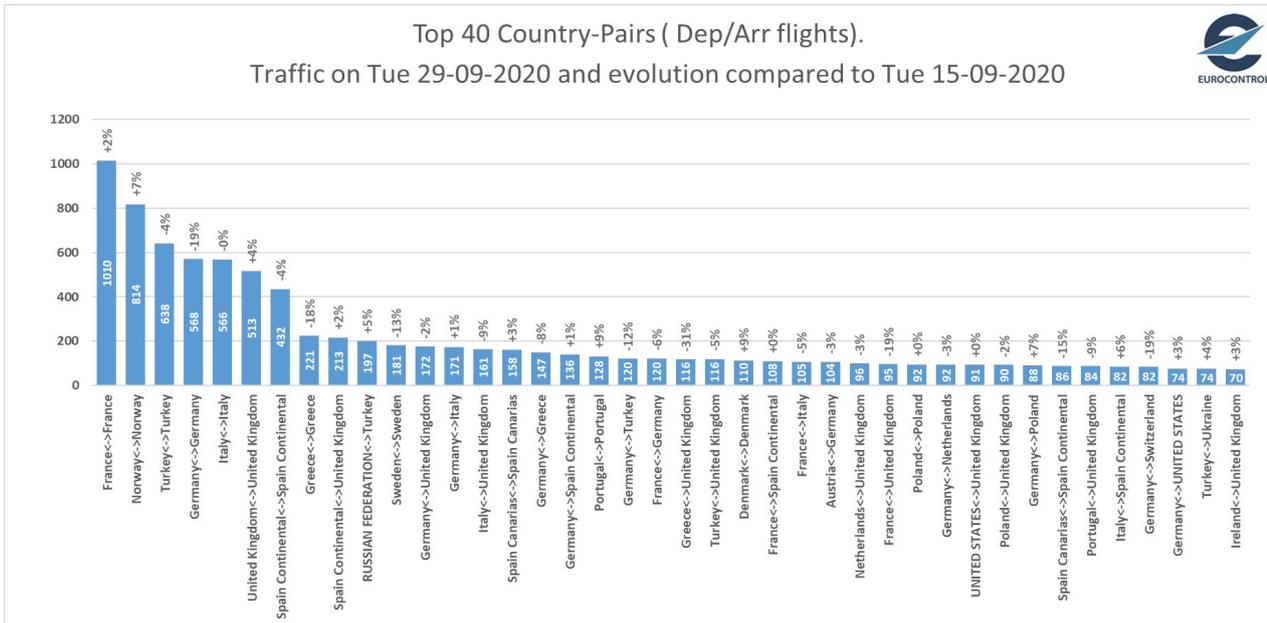
### 2. Traffic Flows & Country Pairs

- The main traffic flow is the intra-Europe flow with 11,880 flights on Tuesday 29 September, which is decreasing (-6%) compared to Tuesday 15 September.
- The top traffic flows with Europe were with “Middle-East” (454 flights, +4%) followed by “North-Atlantic” (407 flights, +0%), “Other Europe” (359 flights, +1%), “Asia/Pacific” (312 flights, +3%) and “North-Africa” (209 flights, -14%).
- Intra-Europe flights are still at -54% compared to 2019 while all other flows are at -69%.

REGION	15-09-2020	29-09-2020	%	vs. 2019
<b>Intra-Europe</b>	<b>12.623</b>	<b>11.880</b>	<b>-6%</b>	<b>-54%</b>
Europe<->Asia/Pacific	303	312	+3%	-62%
Europe<->Mid-Atlantic	37	35	-5%	-74%
Europe<->Middle-East	437	454	+4%	-69%
Europe<->North Atlantic	405	407	+0%	-70%
Europe<->North-Africa	244	209	-14%	-78%
Europe<->Other Europe	355	359	+1%	-69%
Europe<->South-Atlantic	45	35	-22%	-82%
Europe<->Southern Africa	158	154	-3%	-50%
<b>Non Intra-Europe</b>	<b>1.984</b>	<b>1.965</b>	<b>-1%</b>	<b>-69%</b>



- Domestic flows are the most active flows (i.e. 8 of the top 10 flows are domestic). From the top flows, flows within Norway showed the highest increase with +7% followed by the UK (+4%) and France (+2%). All other domestic flows decreased like in Germany (-19%), Greece (-18%), Turkey (-4%) and Sweden (-13%).

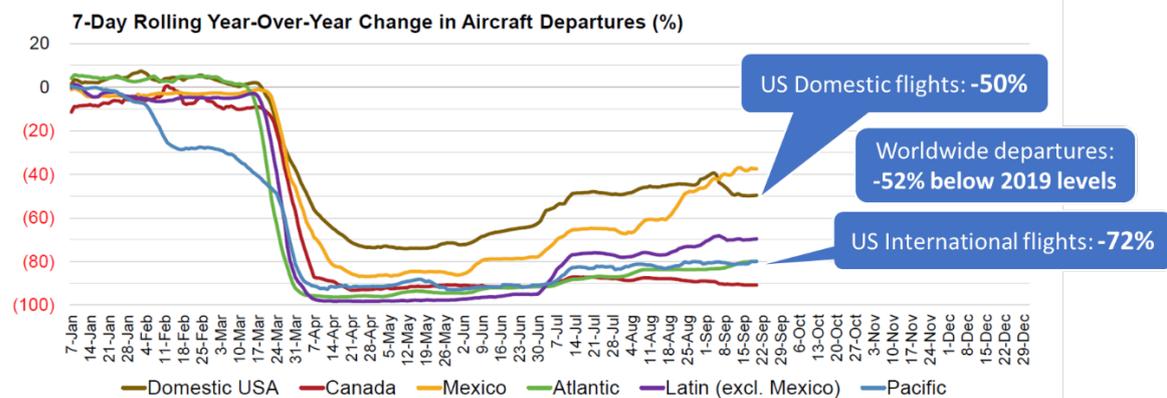


- The busiest non domestic flows were the flow between the UK and Spain (213 flights, +2%) followed by Russia-Turkey (197 flights, +5%).

### 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 1<sup>st</sup> July. Since 1<sup>st</sup> of September, the domestic flow decreased to reach -50% of 2019 on 20 September. International flows slightly increased to -72% except flows to/from Mexico (around -38%).
  - In week ending September 20, U.S. airlines passenger volumes remained 68% below year-ago levels with Domestic Air Travel Down 66% and International Down 84%.
  - The domestic U.S. Load Factor averaged 56% in most recent week, versus 85% a year earlier.

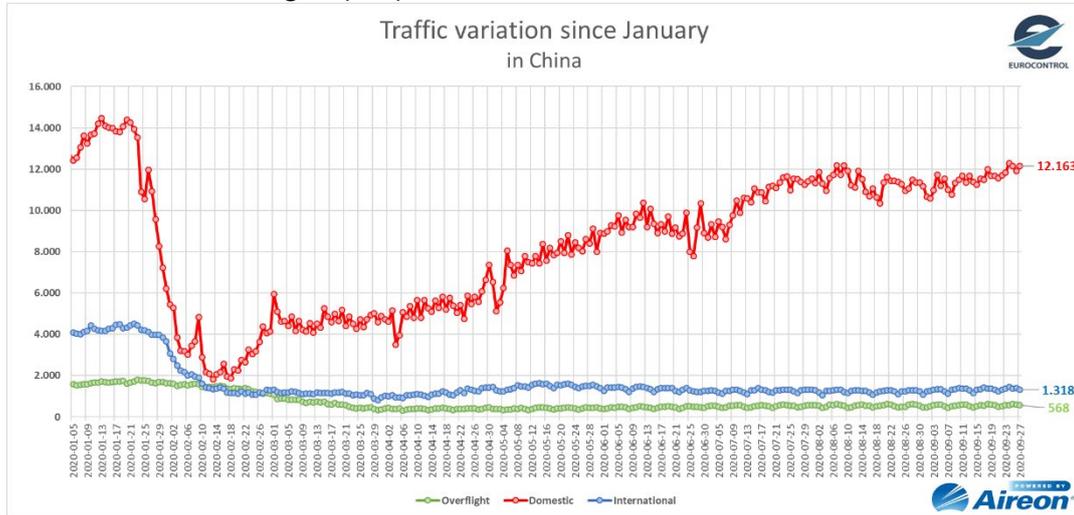
**For U.S. Passenger Airlines, Worldwide Departures Remain 52% Below 2019 Levels**  
In Week Ending Sept. 20 – Domestic Flights Down 50%, International Flights Down 72%



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

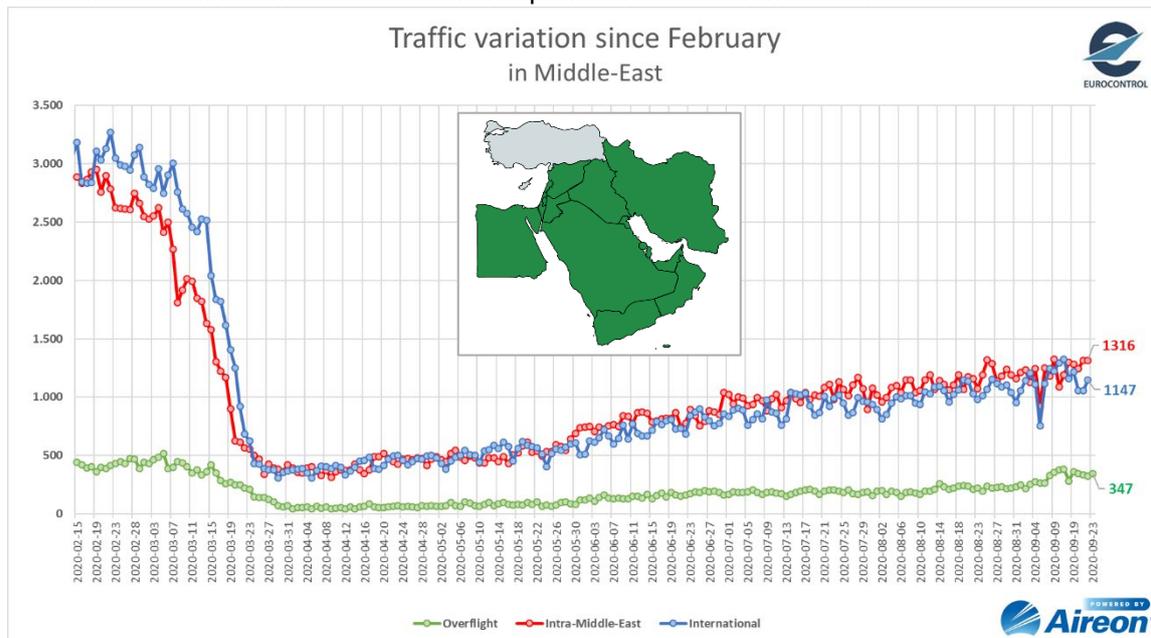
- **China:**

- Chinese domestic flights are now stable with 12,163 flights very close to pre-COVID, after having reached a maximum of 12,168 flights on 25 August. The number of International flights has been stable since March (with 1,318 flights, i.e. still 70% below pre-COVID levels). The same is true for overflights (568).



- **Middle East:**

- Since the beginning of April, Intra-Middle-East traffic has been increasing slowly reaching 1,316 flights on 23 September. International traffic has been recovering at the same levels as domestic from early April but is slightly lagging behind (1,147 flights). Overflights have started to increase since the second week of September but are now stable.

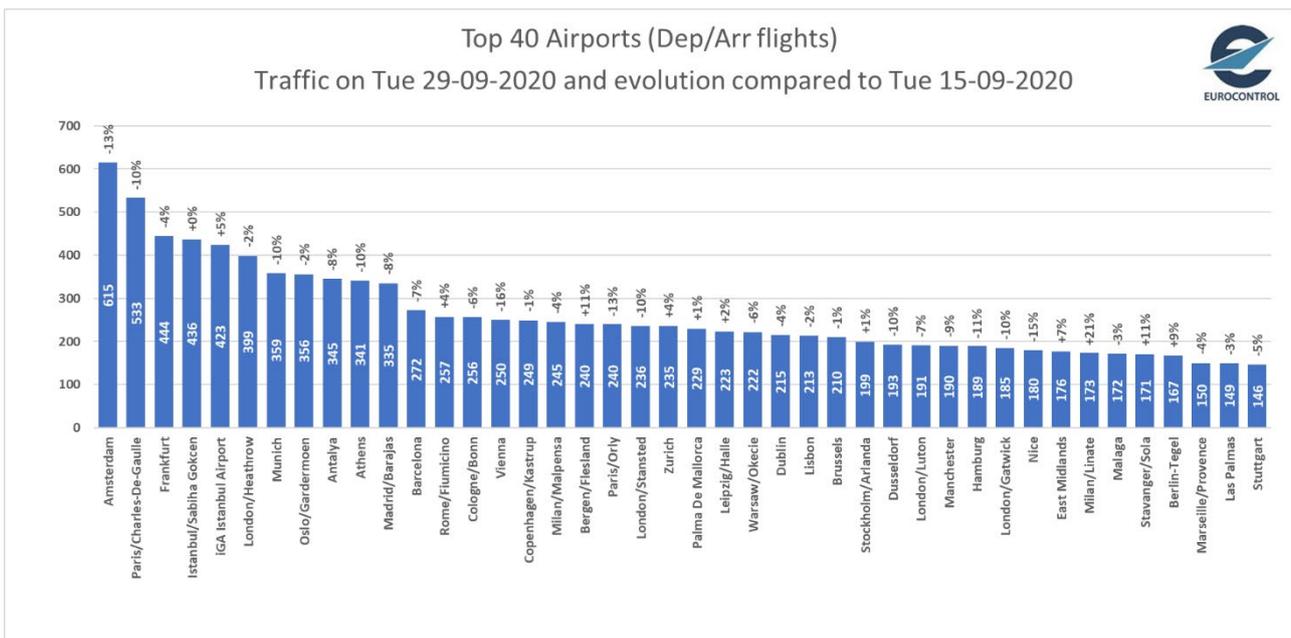


### News for worldwide airlines and ANSPs:

- **Aeroflot Group** reports domestic passenger numbers in August down only 0.4%.
- **Asiana Airlines** has increased the cargo capacity of an A350-900 by 5 tons by removing 283 economy seats.
- **Delta Air Lines** revises European services for the winter, generally reducing frequencies.
- **Emirates Airline** resuming services to South Africa, Zimbabwe, Mauritius, Uganda and Oman.
- **Japan Airlines** resuming service to Guangzhou.
- **Korean Air** resuming service to Osaka.
- **PIA** resumes services to Saudi Arabia.
- **Qantas** selling 1,000 B747 galley carts, stocked with food and beverage.
- **Qatar Airways** plans to expand codeshare partnership with American Airlines; suspends two services to UK over winter and reduces the frequency of two others.
- **Thai Airways** postpones the resumption of several international services to December.
- **NAV CANADA** has reduced its workforce by 14%

### 4. Airport Information

- Amsterdam was the busiest airport with 615 Dep/Arr flights on 29 September (-13% over the last 2 weeks), followed by Paris CDG (533, -10%), Frankfurt (444, -4%), Istanbul/Sabiha (436, +0%), İGA Istanbul Airport (423, +5%), London/Heathrow (399, -2%), Munich (359, -10%), Oslo (356, -2%), Antalya (345, -8%), Athens (341, -10%) and Madrid (335, -8%).
- From the top airports, only İGA Istanbul Airport presented an increase compared to 2 weeks before (+5%). Most airports reported a decrease like Amsterdam (-13%), Paris CDG (-10%), Munich (-10%), Athens (-10%), Antalya (-8%), Madrid (-8%), Frankfurt (-4%) and London Heathrow (-2%).

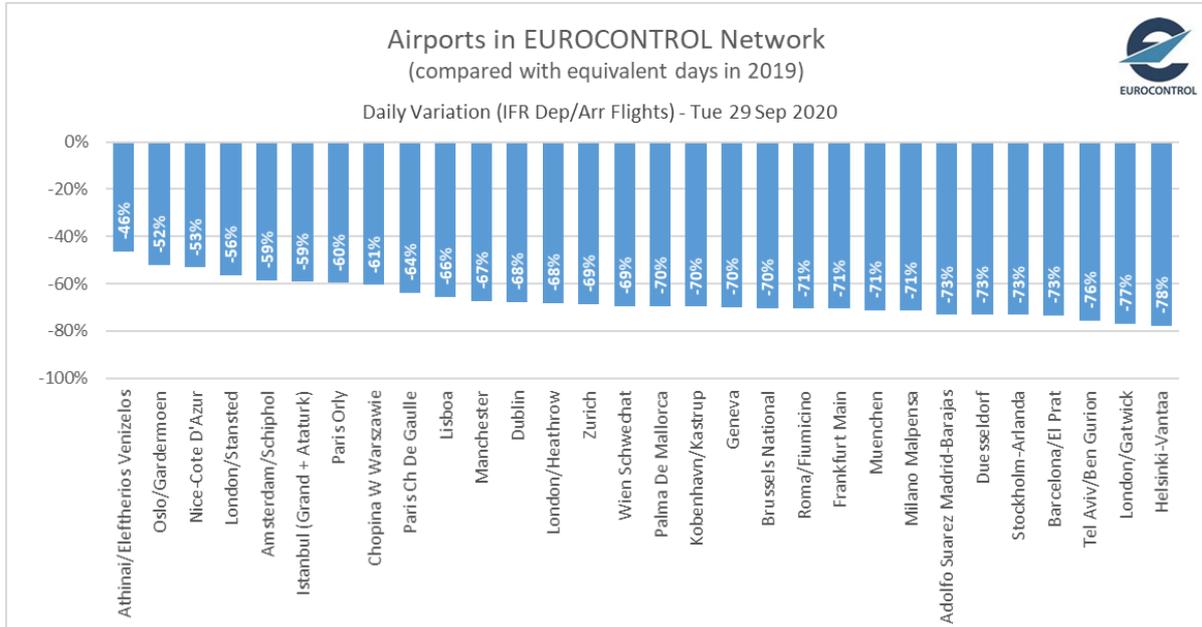


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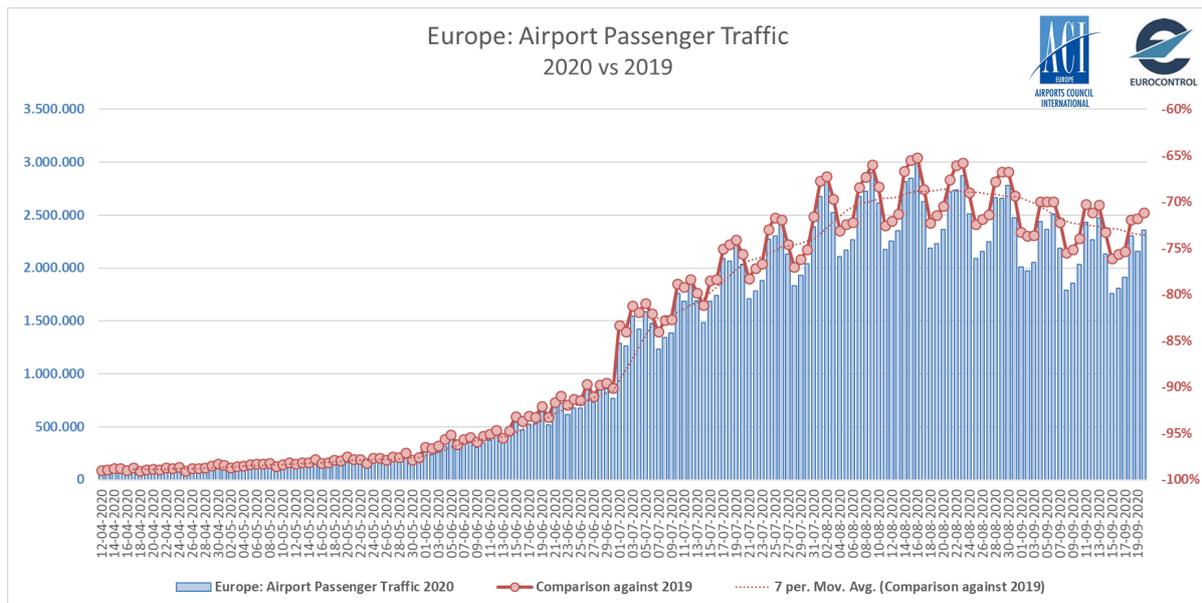


- Compared to 2019, Athens operated at -46% on 29 September, Amsterdam (-59%), Paris CDG (-64%), London Heathrow (-68%), Frankfurt (-71%), Roma (-71%) and Madrid (-73%).



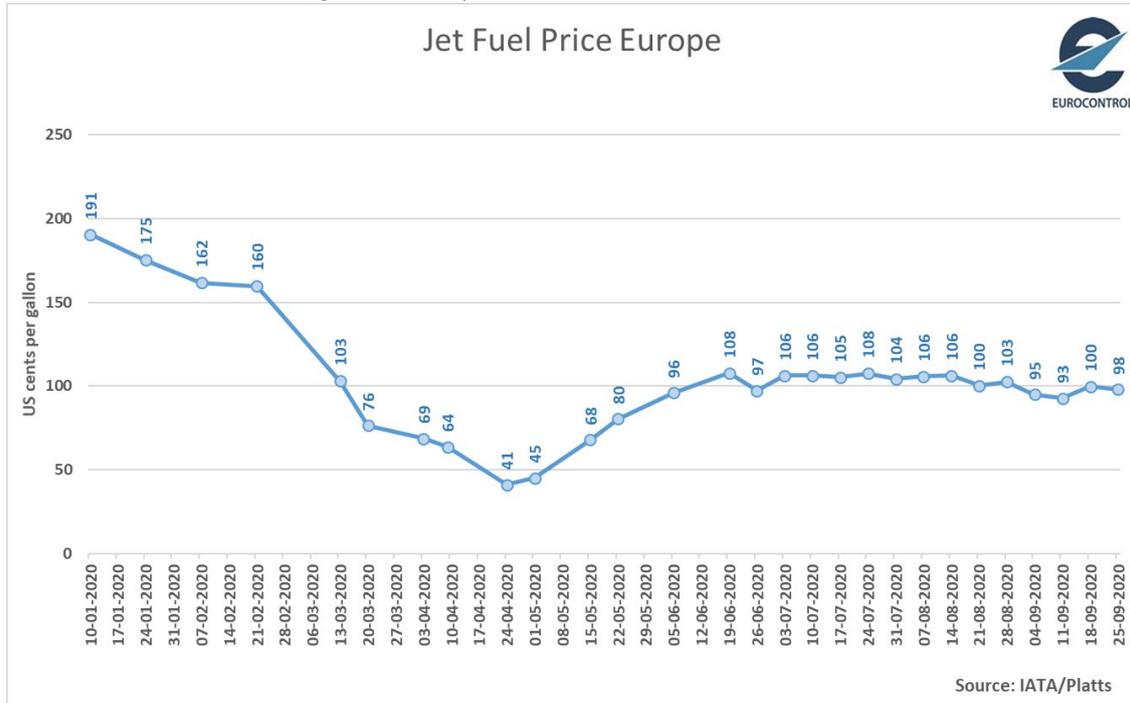
### News from European airports:

- Gatwick Airport** agrees with its lenders the waiving of financial covenants.
- Brussels Airport** preparing for distribution of COVID-19 vaccines.
- According to **ACI**, passenger traffic has remained stable in the Summer at -69% over August compared to August 2019. On Sunday 20 September, ACI reported 2.4 million passengers compared to 8.2 on Sunday 22 September 2019 (i.e. -71%).



### 5. Economic, other factors

- **Fuel Price:** After having remained stable slightly above 100 cts/gal since early July, fuel price decreased to reach 98cts/gal on 25 September 2020.



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](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.

