

Wednesday, 9 September 2020

### Traffic Situation & Airlines Recovery

- 15,382 flights on Tuesday 8 Sept, (-5% with -817 flights vs. Tuesday 25 Aug) reaching -55% of 2019 levels.
- Friday 28 August remained peak traffic day since 18 March with 18,802 flights, -49.2% of 2019 levels.
- Traffic for 1-8 September is -53% below 2019 levels, which is now converging to the **'uncoordinated scenario'** of EUROCONTROL of 24 April. An update of these traffic scenarios will be published in the near future by EUROCONTROL, which will have a downgraded traffic scenario.
- Growing uncertainty due to the reintroduction/imposition of State restrictions, quarantine messages, etc., is leading to reductions in capacity by a number of airlines.
- Airlines are reporting very low forward booking rates for September and October compared to normal.
- On 8 Sept, Ryanair removed 292 flights compared to 2 weeks ago while easyJet removed 294 flight. Ryanair remains the busiest carrier with 1,157 flights on Tuesday 8 Sept showing a decrease of -20% compared to Tuesday 25 August (-292 flights). By decreasing its capacity by 33% (-294 flights), EasyJet was the 2<sup>nd</sup> busiest operator with 601 flights on 8 Sept, followed by Turkish Airlines (578 flights, -7%, -45 flights), Air France (555 flights, +17%, +82 flights), Lufthansa (458 flights, +10%, +42 flights), KLM (439 flights, +9%, +38 flights) and Wizz Air (437 flights, -14%, -71 flights). Almost all low cost carriers decreased their capacity.
- Compared to two weeks ago, Air France had the largest capacity increase (+82 flights) followed by Norwegian Air Shuttle (+56), Lufthansa (+42), KLM (+38), Eurowings (+30), Canarias Airlines (+29), Loganair (+26) and Air Baltic (+23).
- Compared to 2019, Wideroe operated at -17% on Tuesday 8 Sept followed by Pegasus (-31%), Wizz Air (-36%), KLM (-41%), Air France (-53%), Ryanair (-55%), Turkish (-59%), EasyJet (-68%), Lufthansa (-72%). Specific situation for British Airways with +24% because of pilot strike on 10 Sept 2019.
- Compared to 2019, Departure/Arrival traffic in Spain was -64% on Tuesday 8 September, UK (-59%), Germany (-58%), Italy (-57%), Turkey (-52%) and France (-50%).
- Business Aviation was at 0% compared to 2019 levels on 5 Sept. All-cargo stable at +2%. Low-cost decreased at around -56% since early Sept. Slight increase of charter reaching -46% Traditional stable at -63%.

### Traffic Flows & Country Pairs

- The intra-Europe flow is the main flow with 13,131 flights on 8 Sept (-6% on 25 August). Top traffic flows with Europe were with "Middle-East" (410 flights, +14%) followed by "Other Europe" (363 flights, -6%), "North-Atlantic" (357 flights, -3%), "Asia/Pacific" (292 flights, +10%) and "North-Africa" (242 flights, -20%).
- Intra-Europe flow remains at -51% compared to 2019 while all other flows are at -71%.
- Flows within the UK increased the most with +30% followed by Spain Canarias (+10%), France (+9%), Germany (+6%) and Norway (+5%). Some domestic flows decreased like in Turkey (-5%) and Spain Continental (-12%).
- The flow between UK and Spain (224 flights, -23%) was the busiest non domestic flows and is decreasing compared to 2 weeks ago.

### Situation outside Europe

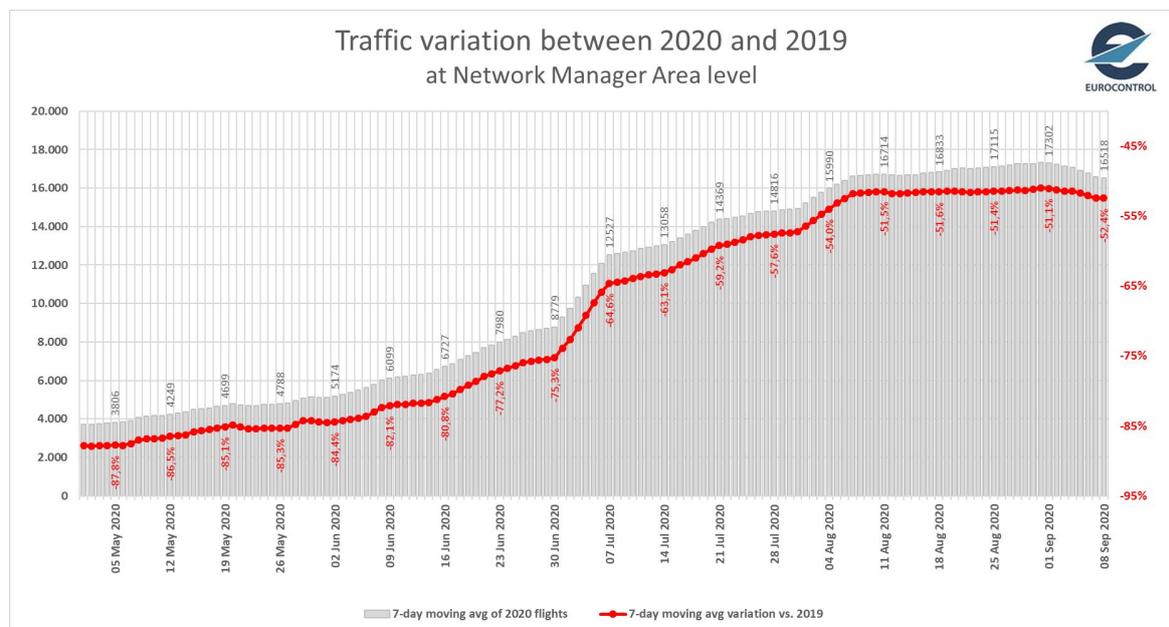
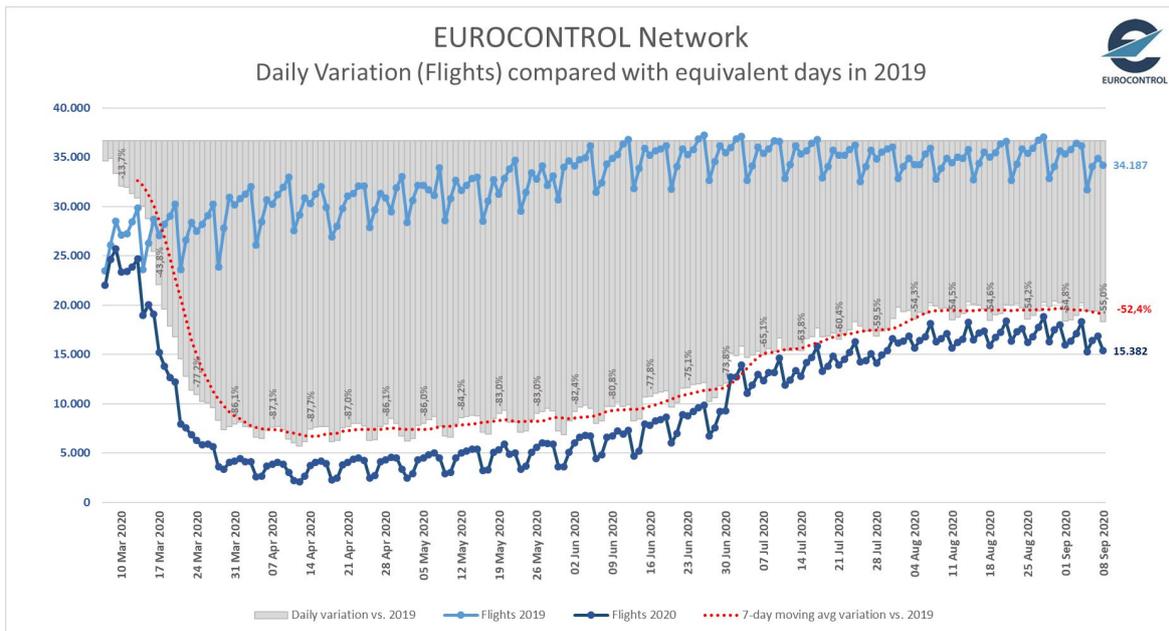
- Traffic is also stable in the US, China and Middle East over the last two weeks. In Brazil, traffic was at -49% compared to 2019 for week 24-30 August with 19,143 movements for the whole week.

### Airport Information

- In August, passenger traffic across the ACI European airports remained at -69% (vs August in 2019). The recovery at airports (passenger) is slower than what was initially expected by the association.
- Amsterdam was the busiest airport with 722 Dep/Arr flights on 8 September, followed by Paris CDG (592), Frankfurt (493), Istanbul/Sabiha (435), Munich (412) Istanbul/Grand (405), London Heathrow (401), Athens (392), Oslo (390) and Madrid (387).
- Some airports reported a 2-digit growth vs. 2 weeks before like Paris Orly (+21%), Munich (+18%) and Oslo (+16%). Paris CDG reported a 2-digit decrease (-18%), like Athens (-14%), Barcelona (-15%), Lisbon (-25%) and Dublin (-11%).

### 1. Traffic Situation and Airlines Recovery

- 15,382 flights on Tuesday 8 September, (-5% with -817 flights compared to Tuesday 25 August). This is 45% of 2019 traffic levels. Based on a 7-day moving average, the decrease is -52.4% 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 (-292) and easyJet (-94) compared to 2 weeks ago. Which is not compensated by the increase of legacy carriers.
- 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

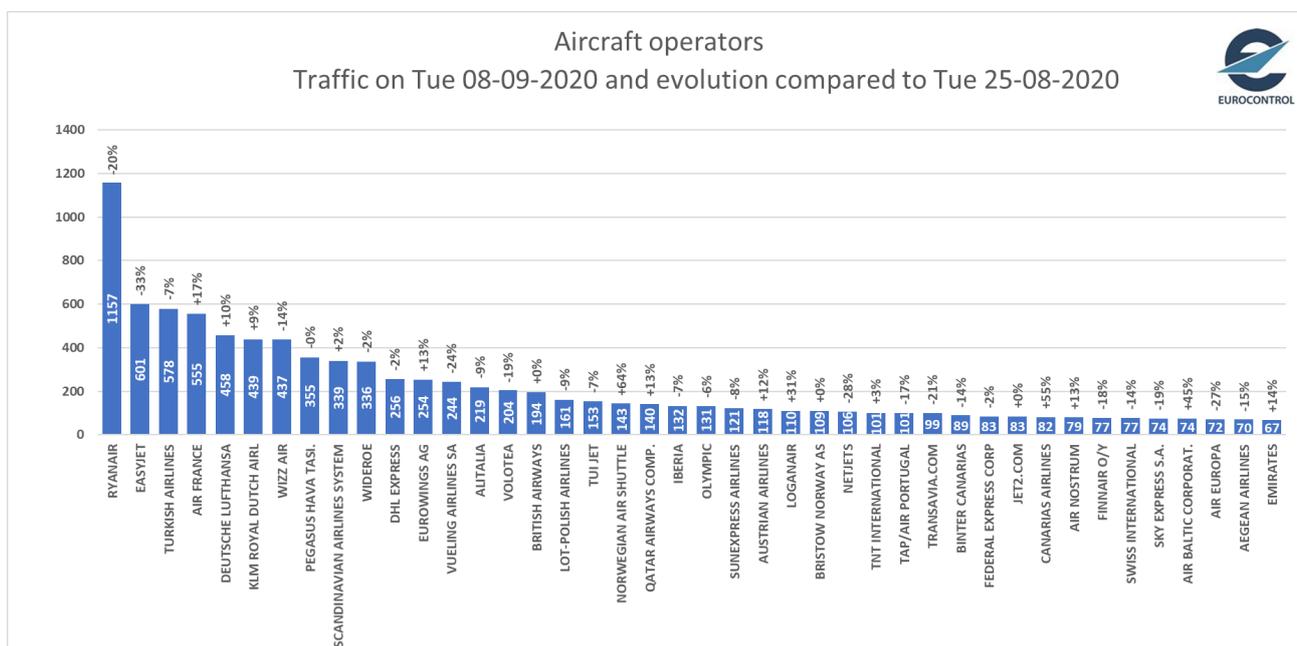


**European Commission** proposes to the European Council common criteria for COVID-19 travel restrictions at the EU level, with the aim of harmonising decision-making and restoring consumer confidence in flying.

**OAG** announces a drop in global capacity for the fifth consecutive week, with scheduled airline capacity for week 34 down by 1.8 million seats owing to reduced demand triggered by changing travel requirements.

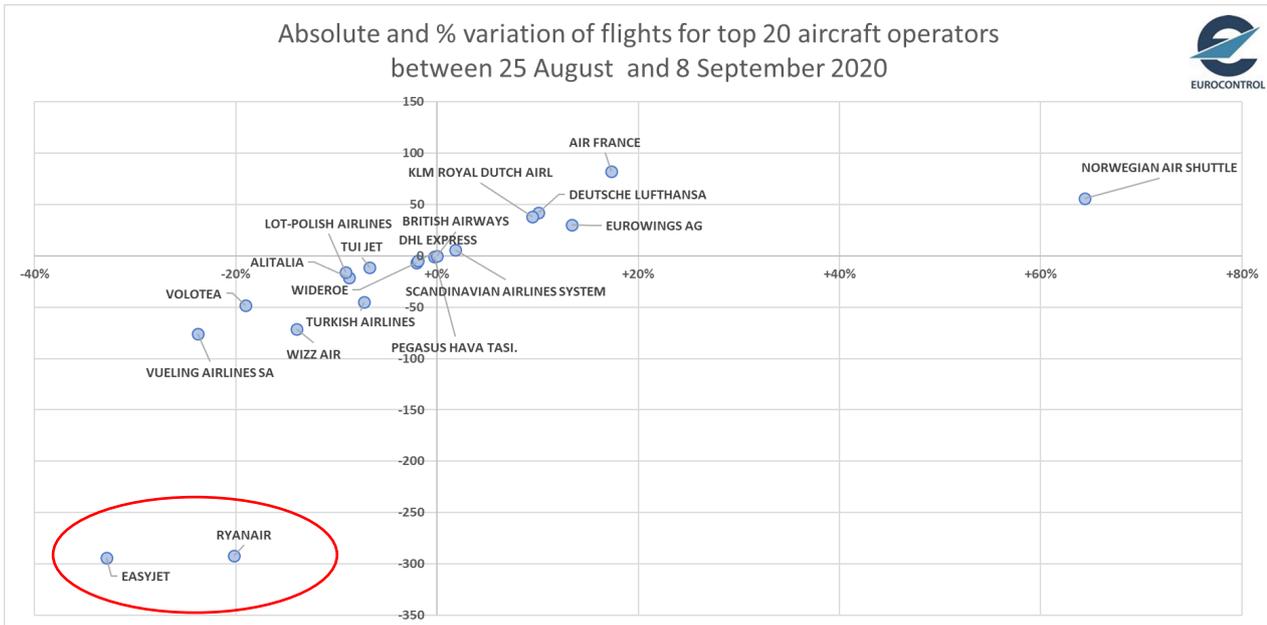
### European Airlines:

- Ryanair was, by far, the airline with the highest number of flights with 1,157 flights on Tuesday 8 September showing a decrease of -20% compared to Tuesday 25 August (-292 flights). By decreasing its capacity by 33% (-294 flights), EasyJet was the 2<sup>nd</sup> busiest operator with 601 flights on 8 September, followed by Turkish Airlines (578 flights, -7%, -45 flights), Air France (555 flights, +17%, +82 flights), Lufthansa (458 flights, +10%, +42 flights), KLM (439 flights, +9%, +38 flights) and Wizz Air (437 flights, -14%, -71 flights).
- Compared to two weeks ago, Air France is the traditional carriers which has most increased its capacities (+82 flights) followed by Norwegian Air Shuttle (+56), Lufthansa (+42), KLM (+38), Eurowings (+30), Canarias Airlines (+29), Loganair (+26) and Air Baltic (+23). Almost all low cost carriers decreased their capacity.

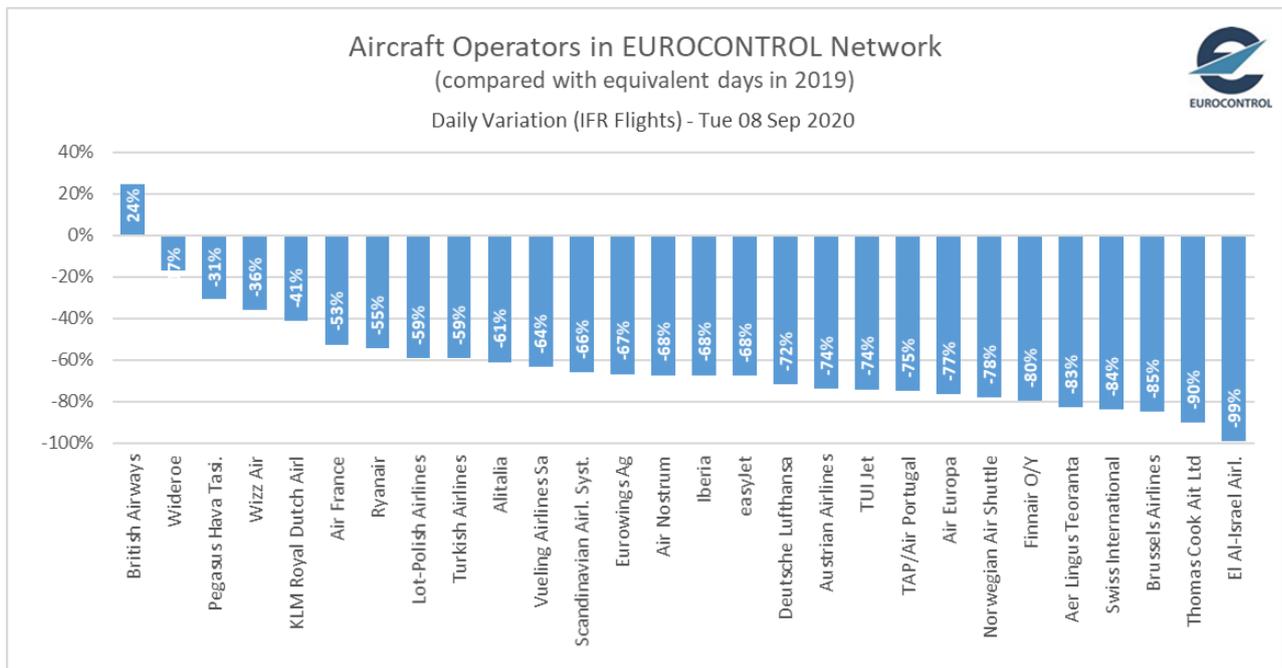


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- Compared to 2019, Wideroe operated at -17% on Tuesday 8 September followed by Pegasus (-31%), Wizz Air (-36%), KLM (-41%), Air France (-53%), Ryanair (-55%), Turkish (-59%), easyJet (-68%), Lufthansa (-72%). Specific situation for British Airways with +24% because of pilot strike on 10 September 2019 with only 156 flights.



### News from key European airlines:

- airBaltic** restores 9 services from Riga in September, bringing routes served up to 35.
- Air Europa** applies for €400 million in State assistance from the SEPI fund set up by the Spanish government to assist key companies impacted by COVID-19.



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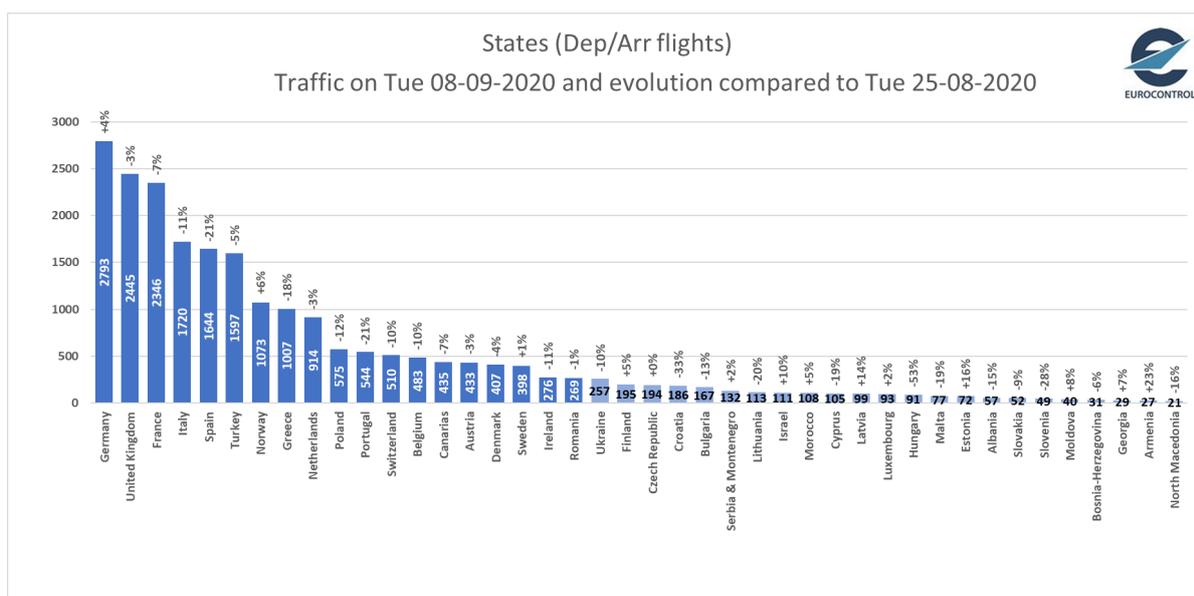
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- **Alitalia** set to benefit from a €199.5 million direct grant from the Italian government in line with EU state aid rules, following European Commission approval of the state aid measure.
- **Brussels Airlines** resuming intercontinental flights during September, restoring 11 African routes, as well as Tel Aviv and New York from 1 October.
- **Corendon Airlines** intends to develop its network further for summer 2021, with new bases at Düsseldorf and Basel, and increased frequencies to Turkey envisaged.
- **easyJet** intends to operate at just under 40% of planned capacity for 4Q2020, reflecting reduced demand for travel stemming from travel restrictions and quarantines.
- **Norwegian** reports for August 91% less passengers flown, with a 62% load factor, with the decline attributed to falling demand and national restrictions.
- **Ryanair** announces it will temporarily close its Cork and Shannon bases for winter 2020 unless EU travel restrictions are lifted.
- **SAS** reports for August 73% fewer passengers flown, with domestic travel down 49% and intra-European traffic down 82%, with overall load factors at 47%.
- **Wizz Air Abu Dhabi** set to start ops on 1 October with what the airline calls the 'lowest cost producer' cost base of the group; Wizz also not ruling out a later move into the Indian market. Creation of base at Catania marks the group's 36th operating base. While passenger volume down 41% year-on-year for August, the airline has kept the load factor fairly high at 71%

### States

- Based on traffic levels, the Top 6 busiest States<sup>1</sup> is stable with Germany with 2793 flights on 8 September (+4% over 2 weeks) followed by the UK (2445, -3%), France (2346, -7%), Italy (1720, -11%), Spain (1644, -21%), Turkey (1597, -5%), Norway (1073, +6%), Greece (1007, -18%), Netherlands (914, -3%), Poland (575, -12%) and Portugal (544, -21%). Most flows between North-West Europe and Southern Europe are now decreasing compared to 2 weeks ago.



<sup>1</sup> excluding overflights.

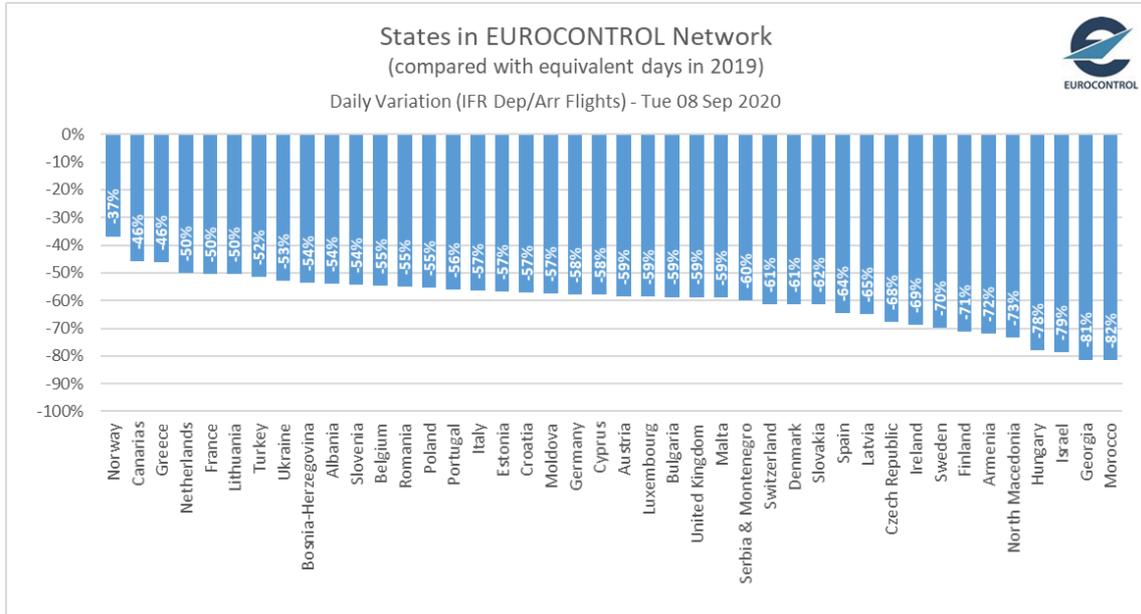


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## EUROCONTROL Comprehensive Assessment

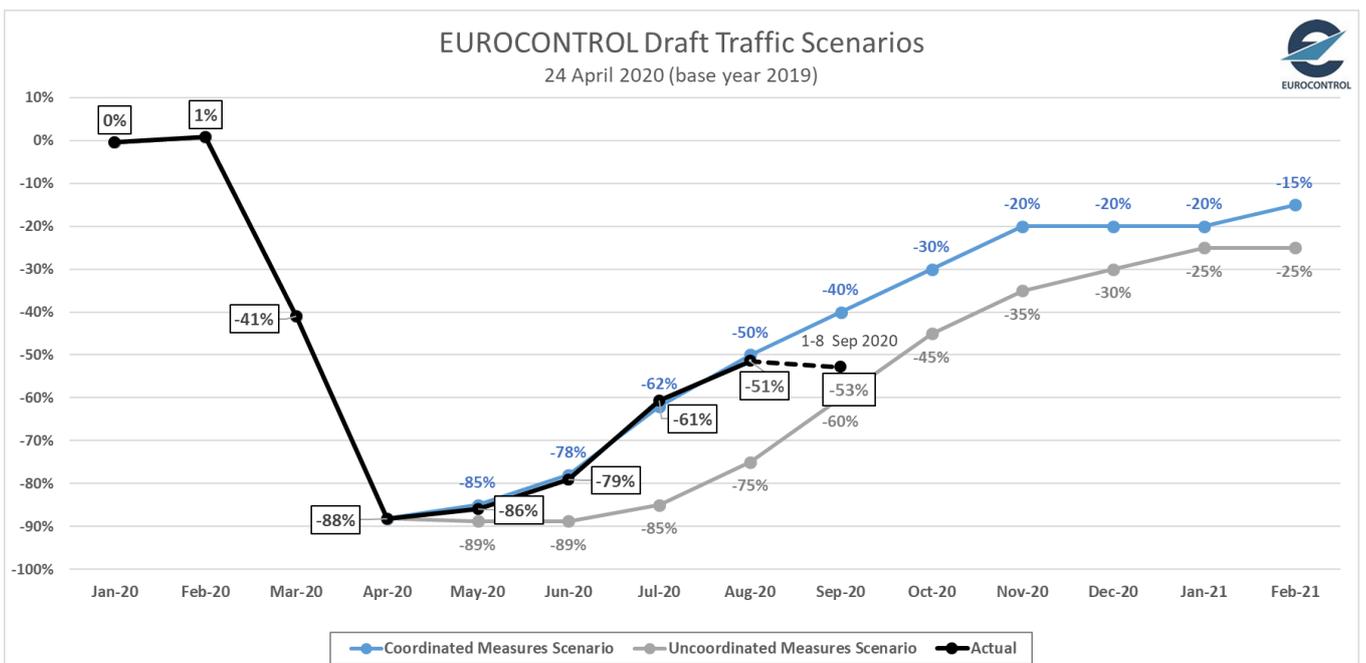


- Compared to 2019, Departure/Arrival traffic in Spain was -64% on Tuesday 8 September, UK (-59%), Germany (-58%), Italy (-57%), Turkey (-52%) and France (-50%).



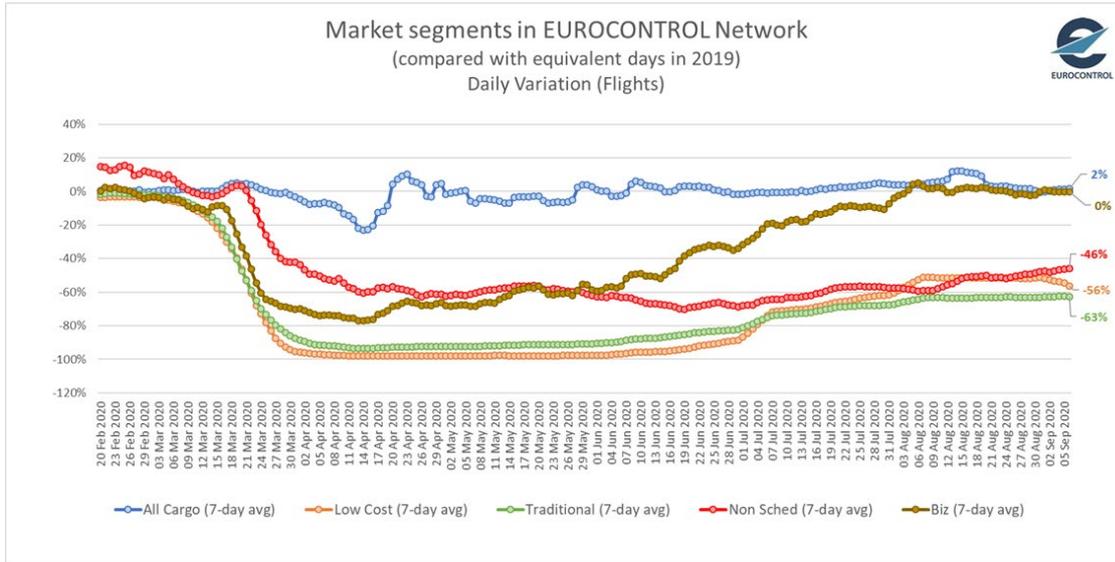
### Overall situation against EUROCONTROL traffic scenarios:

- Traffic in September is stable at -53% below 2019 levels which is now converging to the uncoordinated scenario of EUROCONTROL of 24 April. An update of these traffic scenarios will be published by EUROCONTROL in the near future.



### Market Segments:

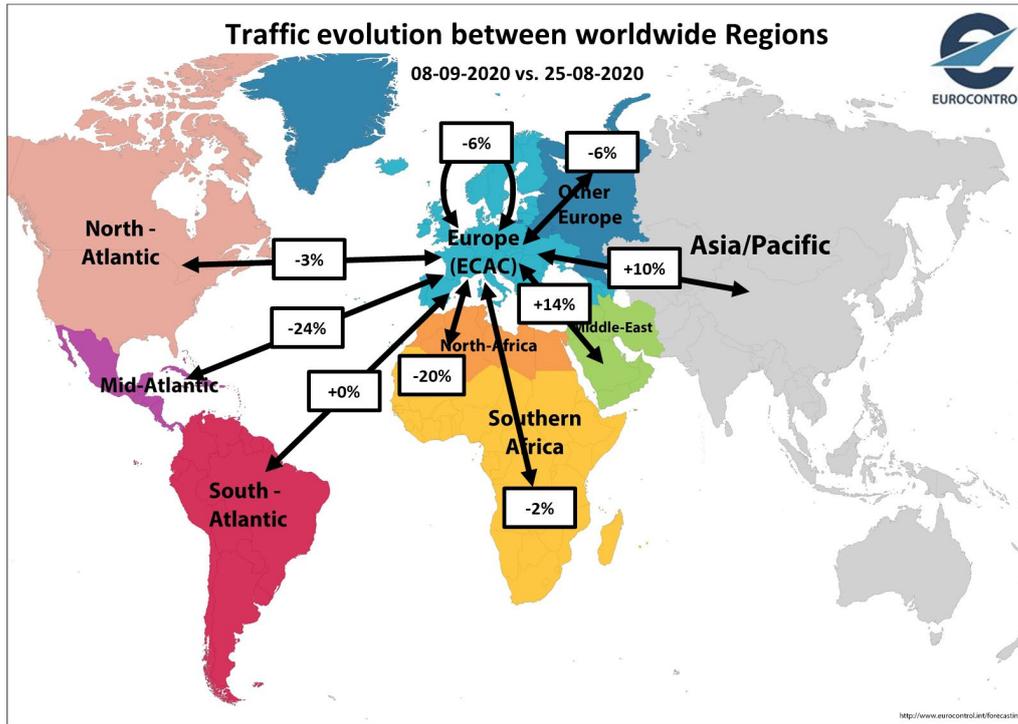
- When considering market segments, the Business Aviation flights are at the 2019 levels (0%). All-cargo flights remained quite stable during the crisis and are now 2% above the 2019 levels (on 5 September).
- Low-cost flights recorded a faster recovery during the Summer but decreased early September with -56% vs 2019. Charter flights (-46%) kept increasing.



## 2. Traffic Flows & Country Pairs

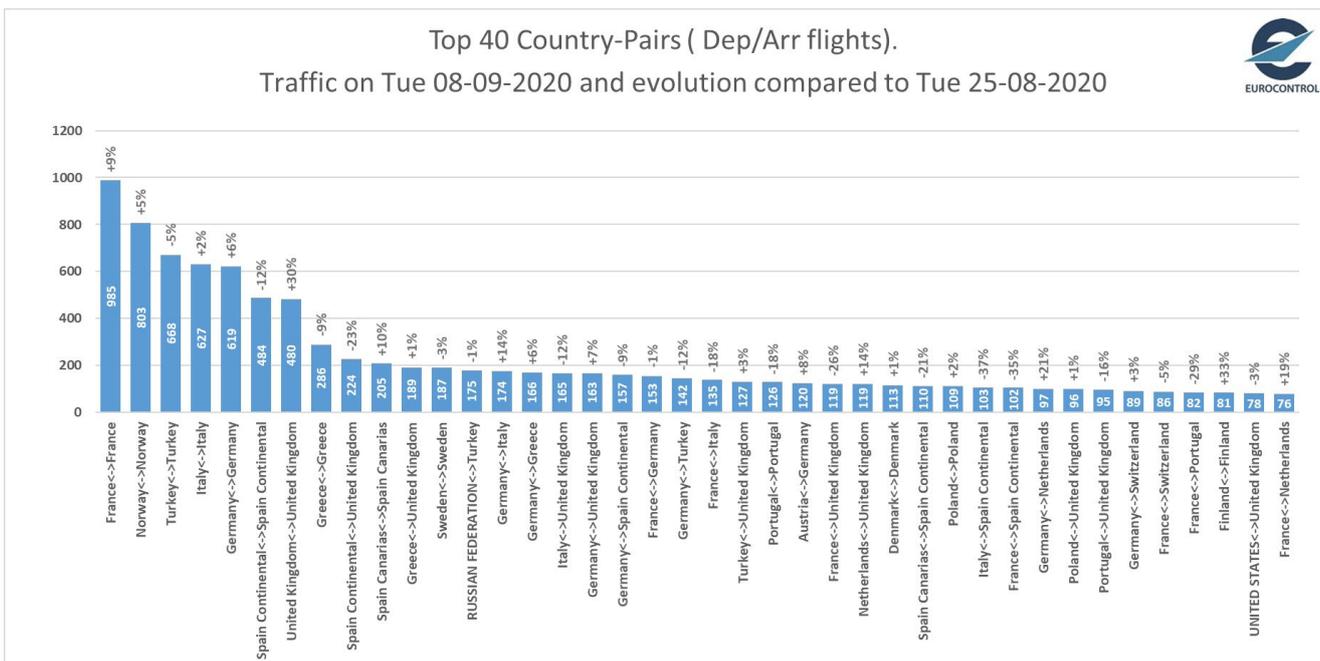
- The main traffic flow is the intra-Europe flow with 13,131 flights on 8 September, which is decreasing (-6%) compared to two weeks before (25 August).
- The top traffic flows with Europe were with “Middle-East” (410 flights, +14%) followed by “Other Europe” (363 flights, -6%), “North-Atlantic” (357 flights, -3%), “Asia/Pacific” (292 flights, +10%) and “North-Africa” (242 flights, -20%).
- However, the Intra-Europe flights are still at -51% compared to 2019 while all other flows are at -71%.

REGION	25-08-2020	08-09-2020	%	vs. 2019
Intra-Europe	13.943	13.131	-6%	-51%
Europe<->Asia/Pacific	266	292	+10%	-62%
Europe<->Mid-Atlantic	50	38	-24%	-72%
Europe<->Middle-East	359	410	+14%	-72%
Europe<->North Atlantic	368	357	-3%	-72%
Europe<->North-Africa	301	242	-20%	-78%
Europe<->Other Europe	385	363	-6%	-70%
Europe<->South-Atlantic	42	42	+0%	-78%
Europe<->Southern Africa	149	146	-2%	-50%



ECAC = 44 European States.

- Domestic flows are still the most active flows (i.e. 9 of the top 10 flows are domestic). Flows within the UK showed the highest increase with +30% followed by Spain Canarias (+10%), France (+9%), Germany (+6%) and Norway (+5%). However, some domestic flows decreased like in Turkey (-5%) and Spain Continental (-12%).
- The flow between UK and Spain (224 flights, -23%) was the busiest non domestic flows and is decreasing compared to 2 weeks ago.

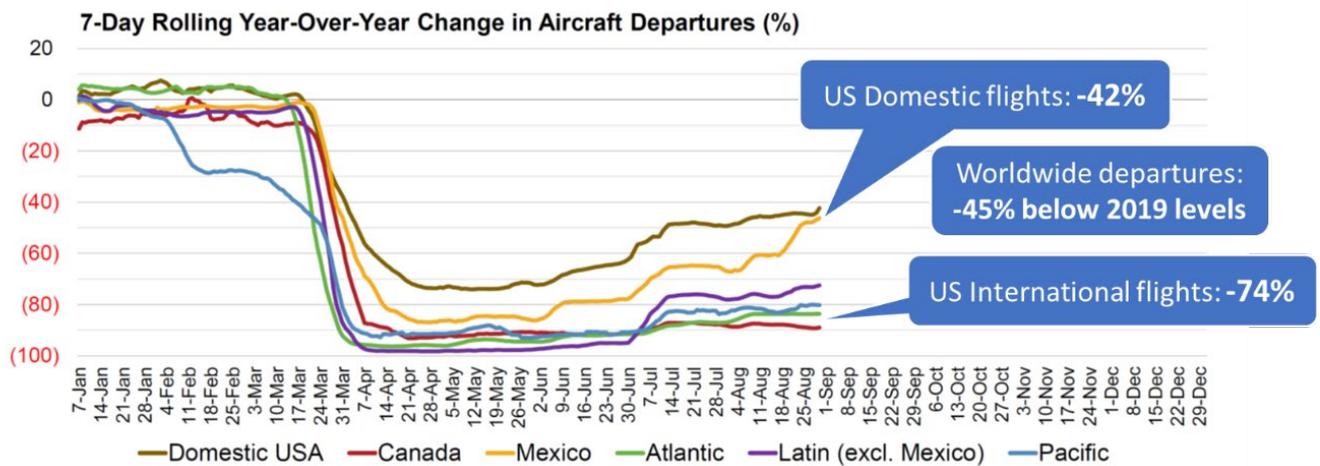


### 3. Situation outside Europe

- **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 1<sup>st</sup> July. The domestic flow slightly increased at the end of August reaching -42% of 2019 on September 7. International flows slightly increased to -74% except flows to/from Mexico (around -44%).
- In week ending September 7, U.S. airlines passenger volumes remained 70% below year-ago levels with Domestic Air Travel Down 67% and International Down 86%.
- The domestic U.S. Load Factor averaged 46% in most recent week, versus 82% a year earlier.

**For U.S. Passenger Airlines, Worldwide Departures Remain 45% Below 2019 Levels**  
 In Week Ending August 30 – Domestic Flights Down 42%, International Flights Down 74%



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

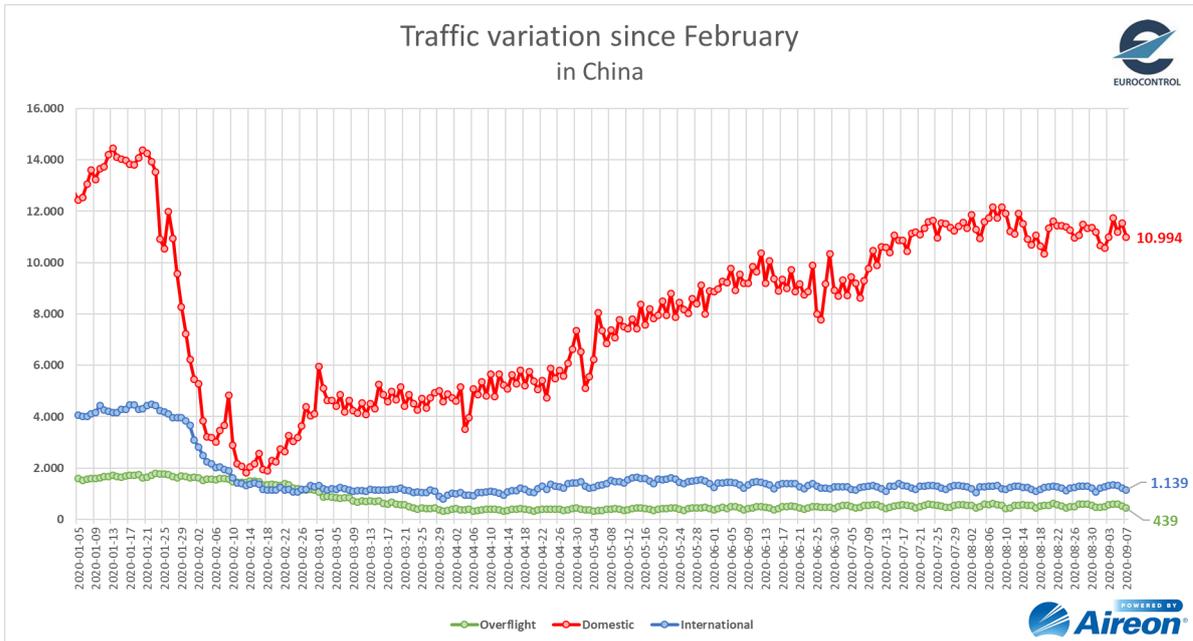


- **China:**

- Chinese domestic flights are now stable with 10,994 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 1,139 flights, i.e. still 70% below pre-COVID levels). The same is true for overflights (439).

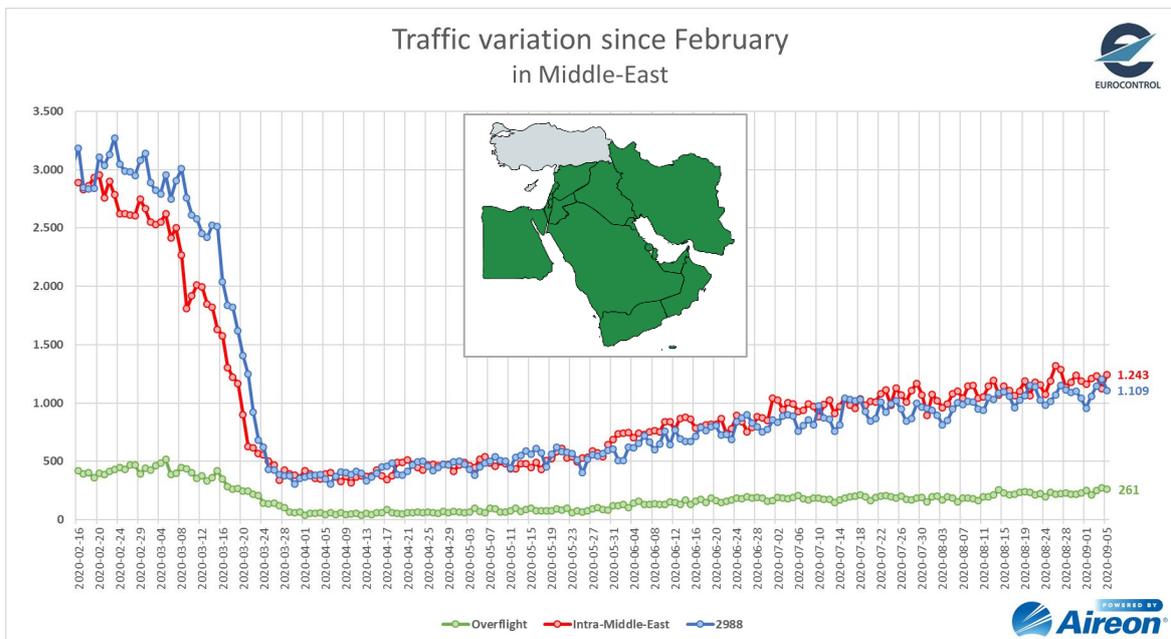
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- **Middle East:**

- Since the beginning of April, Intra-Middle-East traffic has been increasing slowly reaching 1,243 flights on 5 September. International traffic has been recovering at the same levels as domestic from early April but is slightly lagging behind (1109 flights). Some travel restrictions are still in place for international flows.



### News and Plans for key worldwide airlines:

- **Asia/Middle East**
  - **AirAsia** plans to raise around USD600 million by end-2020 to mitigate COVID-19 impacts, and does not rule out moving out of the Japanese market.
  - **Japan Airlines** plans to reduce domestic frequencies in the second half of September by an additional 5%, bringing total frequency suspensions to 36%.
  - **Oman Air** expects to resume international services on 1 October following a national decision to reopen Omani airspace to international flights on that date.
  - **Qatar Airways** announces plans to operate more than 650 weekly frequencies to more than 85 destinations by mid-September 2020, lower than expected however due to travel restrictions.
- **North America**
  - **United Airlines** plans to operate 38% of its full domestic schedule in September 2020 and 46% in October 2020; international services are planned at 29% and 33% respectively..

### News and Plans for worldwide countries:

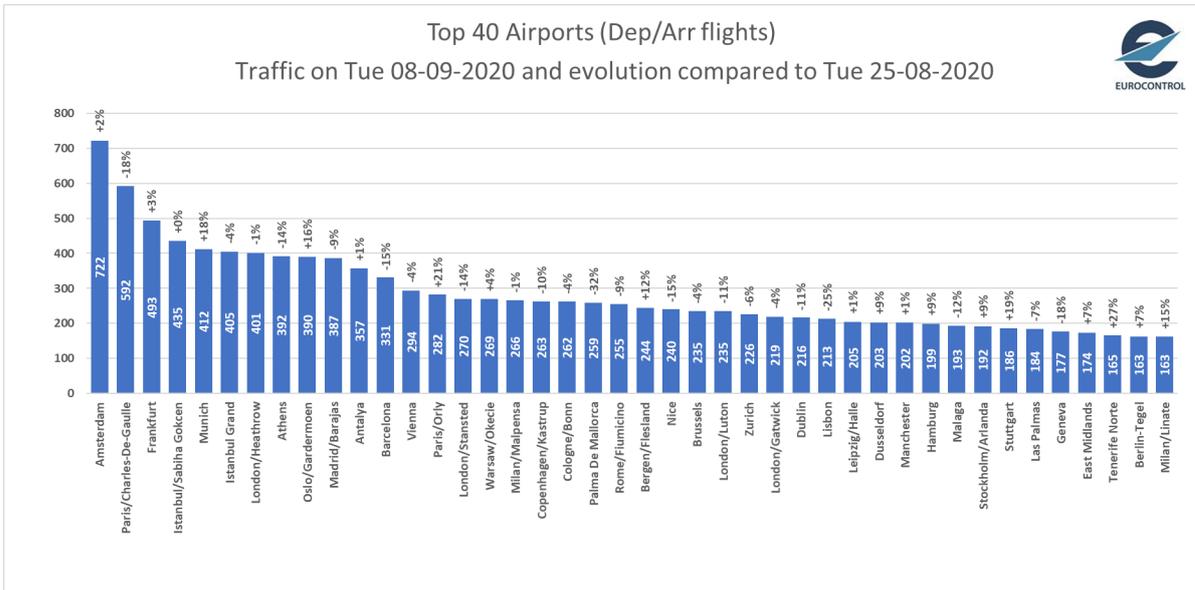
- **Argentina** announces a resumption of domestic traffic in October 2020; international services remain suspended.
- **Peru** announces a resumption of international services in October 2020.
- **Russia** is running at only a 3.7% drop in pre-COVID capacity, making it the country/region closest to pre-COVID traffic volumes, OAG reports.
- **China** maintains its position as the world's largest air travel market by scheduled capacity, with close to 90% of pre-COVID traffic volumes. The Chinese market is currently 45% larger than the US, as capacity continues to fall in North America.

## 4. Airport Information

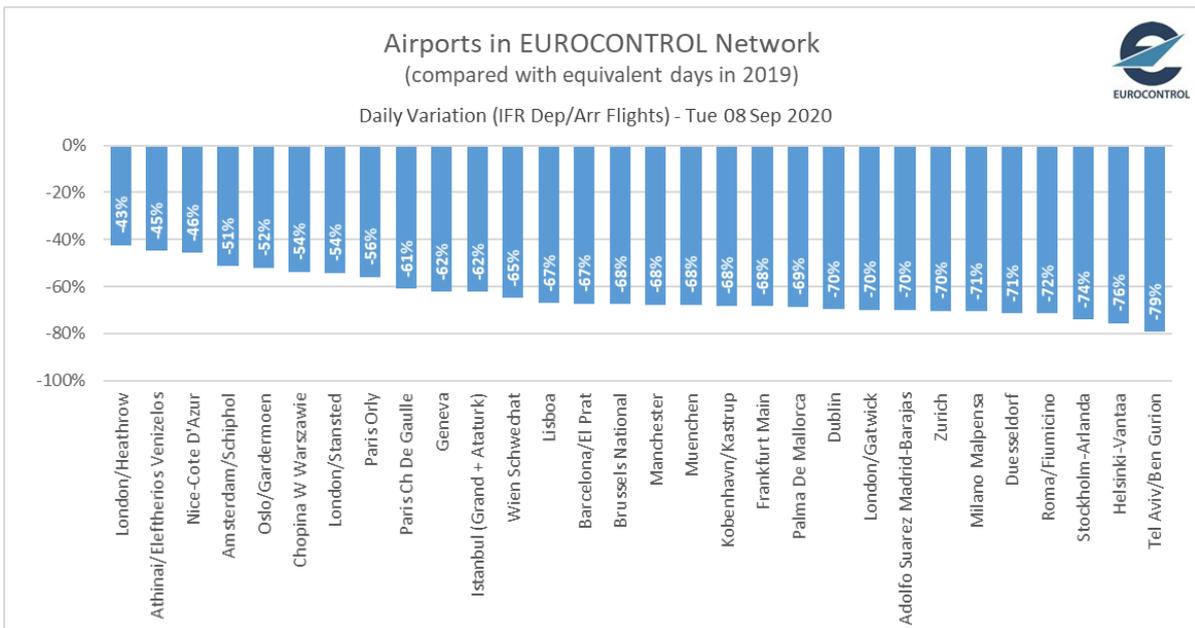
- Amsterdam was the busiest airport with 722 Dep/Arr flights on 8 September, followed by Paris CDG (592), Frankfurt (493), Istanbul/Sabiha (435), Munich (412) Istanbul/Grand (405), London Heathrow (401), Athens (392), Oslo (390) and Madrid (387).
- Few airports posted a 2-digit growth compared to 2 weeks before like Paris Orly (+21%), Munich (+18%) and Oslo (+16%). Other airports reported a 2-digit decrease like Paris CDG (-18%), Athens (-14%), Barcelona (-15%), Lisbon (-25%) and Dublin (-11%).

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- Compared to 2019, Athens operated at -45% on 8 September, Amsterdam (-51%), Paris CDG (-61%), Frankfurt (-68%), Madrid (-70%) and Roma (-72%). London Heathrow operated at -43% exceptionally because of the strike of British Airways pilots on 9 and 10 September 2019 leading to much lower traffic at that time.

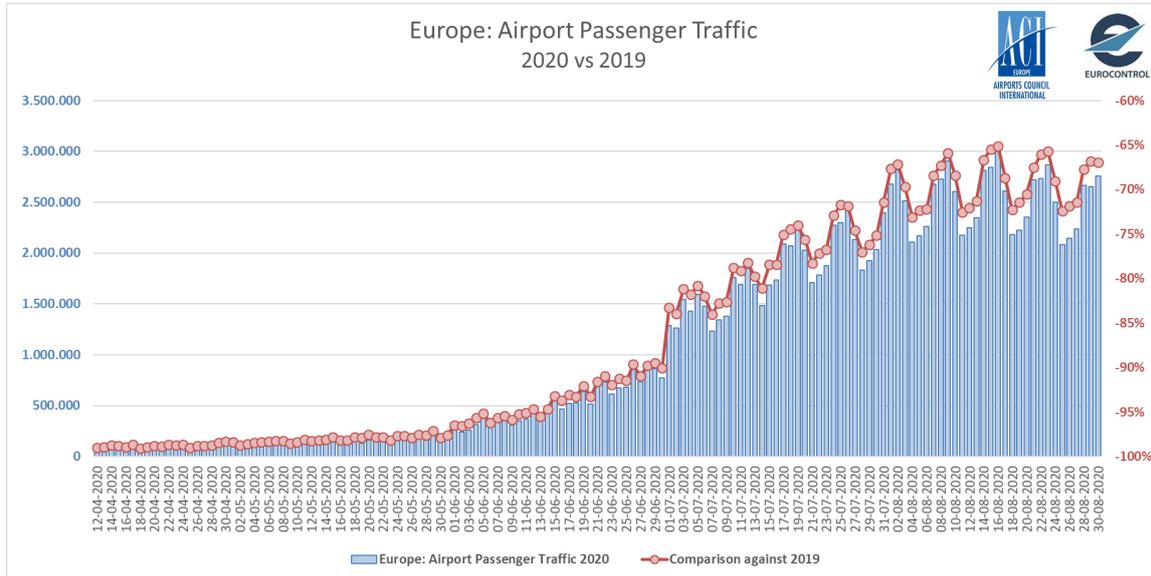


### News and Plans for key airports:

- Busan Airport** expects to reopen for international flights later this month, after having suspended them since April 2020, joining Seoul's Incheon airport from which a reduced range of flights are available.
- Stockholm Västerås Airport** slated to cease operations following decision by the Västerås city council to close it, with Ryanair the main carrier set to be affected if the decision proves binding.

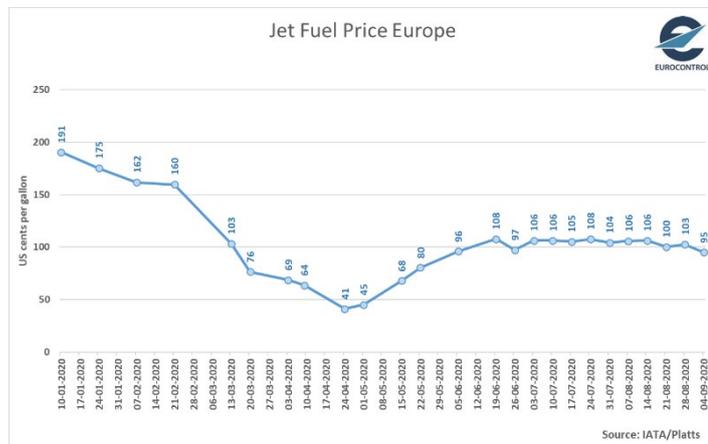


- According to **ACI**, passenger traffic has remained stable in the Summer at -69% over August compared to August 2019. On Sunday 30 August 2020, ACI reported 2.8 million passengers compared to 8.3 on Sunday 1 September 2019



### 5. Economic, other factors

- **Fuel Price:** After having remained stable slightly above 100 cts/gal since the early July, fuel price decreased to 95cts/gal in the first 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](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.

