COVID19 Impact on European Air Traffic
EUROCONTROL Comprehensive Assessment

EUROCONTROL

Wednesday, 7 October 2020

Traffic Situation & Airlines Recovery

- **13,024 flights on Tuesday 6 October, (-10% with -1,500 flights vs. 22 Sept) reaching 41% of 2019 levels (Note that Tuesdays have traditionally been the quietest day of the week for traffic during the pandemic).**
- 7-day moving average is -55.6% compared to 2019.
- **Traffic in September was -54% below 2019** levels, fully in line with the latest EUROCONTROL traffic scenarios published on 14 September. Over **1-6 October traffic is -56%**, also in line for the moment with the scenarios.
- Airlines are reporting very low forward booking rates until end of 2020 compared to normal.
- **Ryanair remains the busiest carrier with 777 flights** on Tuesday 6 Oct showing a decrease of -31% over 2 weeks (-348 flights) followed by Turkish Airlines (579, +1%, +4 flights), Air France (460 flights, -9%, -47 flights), Lufthansa (413 flights, -6%, -25 flights), KLM (373 flights, -11%, -44 flights), easyJet (335 flights, -38%, -205 flights) and British Airways (328 flights, +65%, +129 flights).
- Compared to two weeks ago, **British Airways** was the carrier which has **increased the most its capacity (+129 flights)** followed by ENAC (+51) and TAP (+21). Many big airlines decreased their capacity: **Ryanair (-348), EasyJet (-205)**, Wizz Air (-58), Volotea (-57), Air France (-47), KLM (-44) and Eurowings (-39).
- Compared to 2019, Pegasus operated at -34% on Tuesday 6 Oct followed by KLM (-51%), Turkish Airl. (-57%), Air France (-60%), Wizz Air (-60%), British Airways (-65%), Ryanair (-68%), Lufthansa (-74%) and easyJet (-80%).
- **Load Factors decreased significantly in July-Aug 2020** compared to July-Aug 2019 reaching 77% for Pegasus, 73% for Ryanair Group, 49% for SAS Group, 67% for Turkish Airlines and 66% for Wizz Air. Moreover, the decrease in passenger traffic in July-Aug 2020 vs. 2019 ranged from -47% for Wizz Air to -73% for SAS Group.
- Compared to 2019, dep/arr traffic in Spain was -73% on Tuesday 6 October, the UK (-65%), Italy (-64%), Germany (-63%), France (-56%) and Turkey (-49%).
- Business Aviation recovery was stable at -15% while Charter flights increased since October reaching -41%.

Traffic Flows & Country Pairs

- The intra-Europe flow is the main flow with 10,807 flights on 6 Oct (-12% on 22 Sept). Top traffic flows with Europe were with “Middle-East” (439 flights, +8%) followed by “North-Atlantic” (420 flights, +7%), “Other Europe” (316 flights, -9%), “Asia/Pacific” (270 flights, -14%) and “North-Africa” (209 flights, +2%).
- Intra-Europe flow is at -57% compared to 2019 while all other flows are at -68%.
- From the top domestic flows, only Greece showed an increase with 2%. All other domestic flows decreased like in Germany (-21%), Spain (-12%), Norway (-4%), Turkey (-4%), UK (-4%) and France (-1%).
- The busiest non domestic flows were UK-Germany (178 flights, +2%) followed by Russia-Turkey (178 flights, +2%), Germany-Italy (158, -7%) and Germany-Greece (153, -1%).

Situation outside Europe

- Compared to pre-Covid, domestic traffic in the US is 51% while in China, it has reached its pre-Covid level.

Airport Information

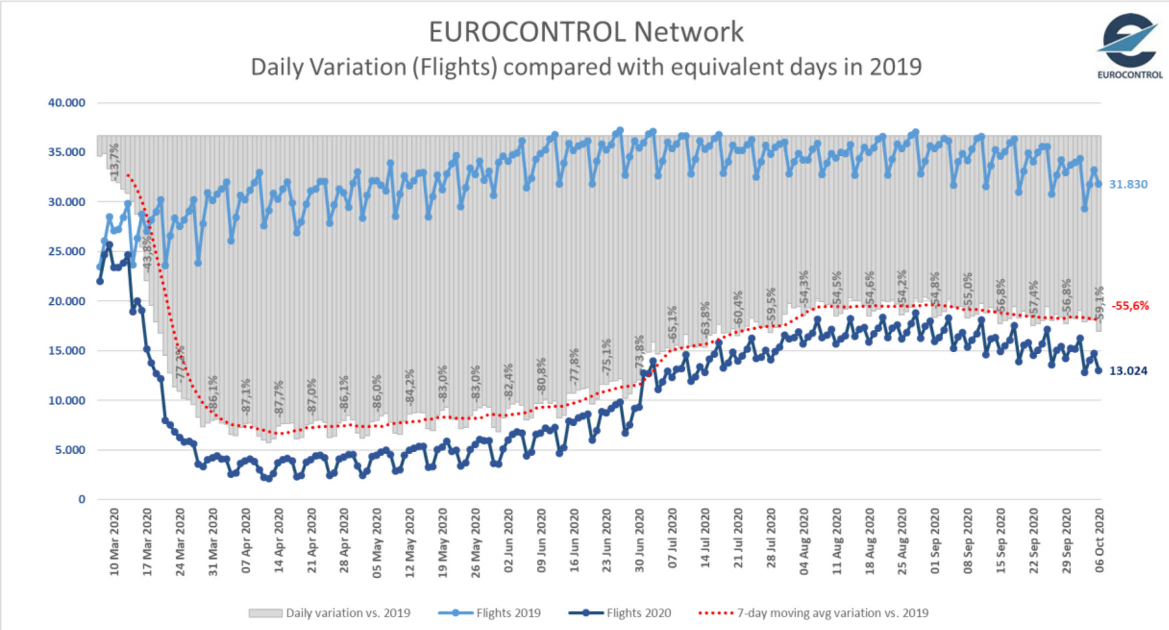
- Amsterdam was the busiest airport with 600 Dep/Arr flights on 6 Oct (-9% over the last 2 weeks), followed by London/Heathrow (503, +21%), Paris CDG (496, -11%), Frankfurt (447, -1%), Istanbul/Sabiha (433, -0%), İGA Istanbul Airport (414, +3%), Oslo (355, -6%), Antalya (330, -4%), Munich (323, -15%) and Madrid (300, -12%).
- From the top airports, only two presented an increase over two weeks: London/Heathrow (+21%) and İGA Istanbul Airport (+3%). Most airports reported a decrease like Munich (-15%), Madrid (-12%), Paris CDG (-11%), Athens (-10%), Amsterdam (-9%) and Antalya (-4%). Frankfurt and Istanbul/Sabiha were stable.
- Compared to 2019, Athens operated at -52% on 6 Oct, Amsterdam (-59%), London Heathrow (-63%), Paris CDG (-66%), İGA Istanbul Airport (-66%), Frankfurt (-70%), Roma (-72%) and Madrid (-76%).

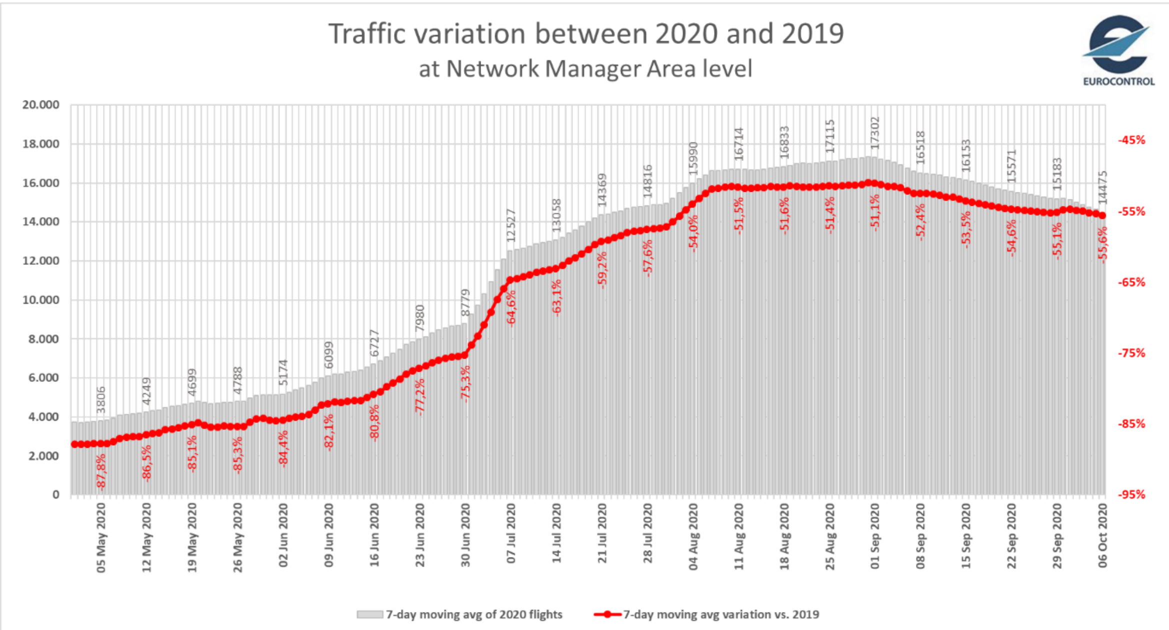
Economic

- **EU Emission Allowance:** From March till May, EU carbon prices decreased to reach 20€/ton before rising to 27€/ton in July and August**.**
- **Fuel price:** Fuel price decreased to 94cts/gal on 2 October 2020.

1. Traffic Situation and Airlines Recovery

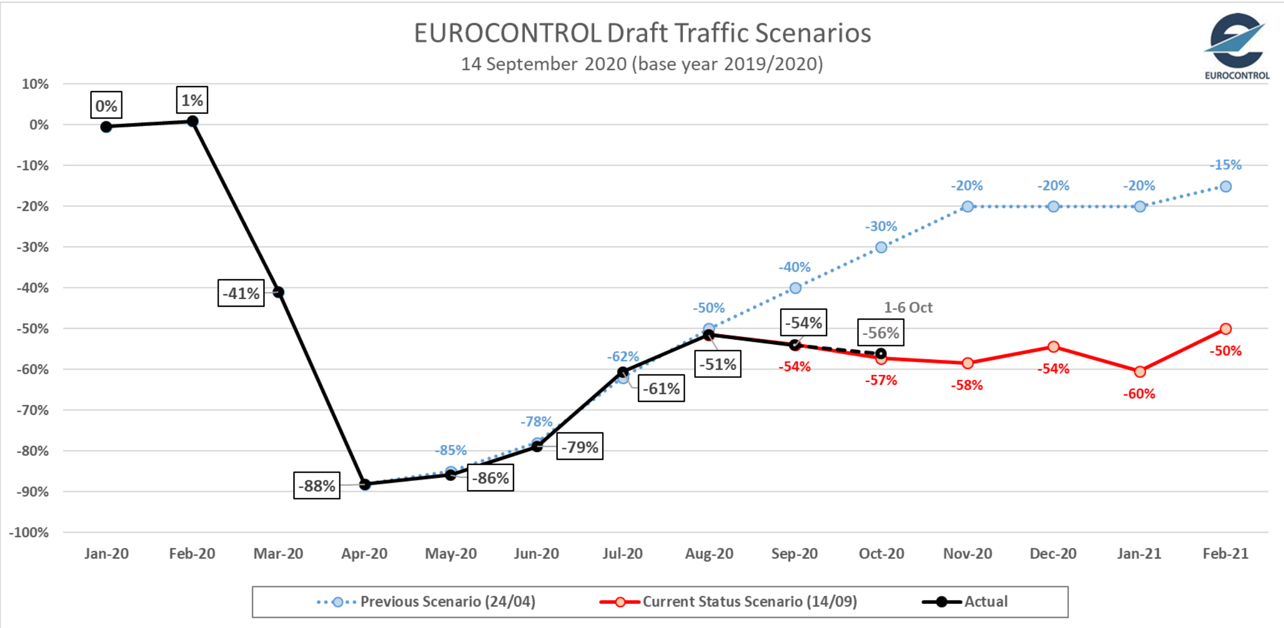
- 13,024 flights on Tuesday 6 October, (-10% with -1,500 flights compared to Tuesday 22 September). This is 41% of 2019 traffic levels. Based on a 7-day moving average, the decrease is -55.6% compared to 2019 which is now degrading since early September (due to the increase of States' restrictions) and even more since 1st October with Ryanair and easyJet removing more than 550 flights per day.
- 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.





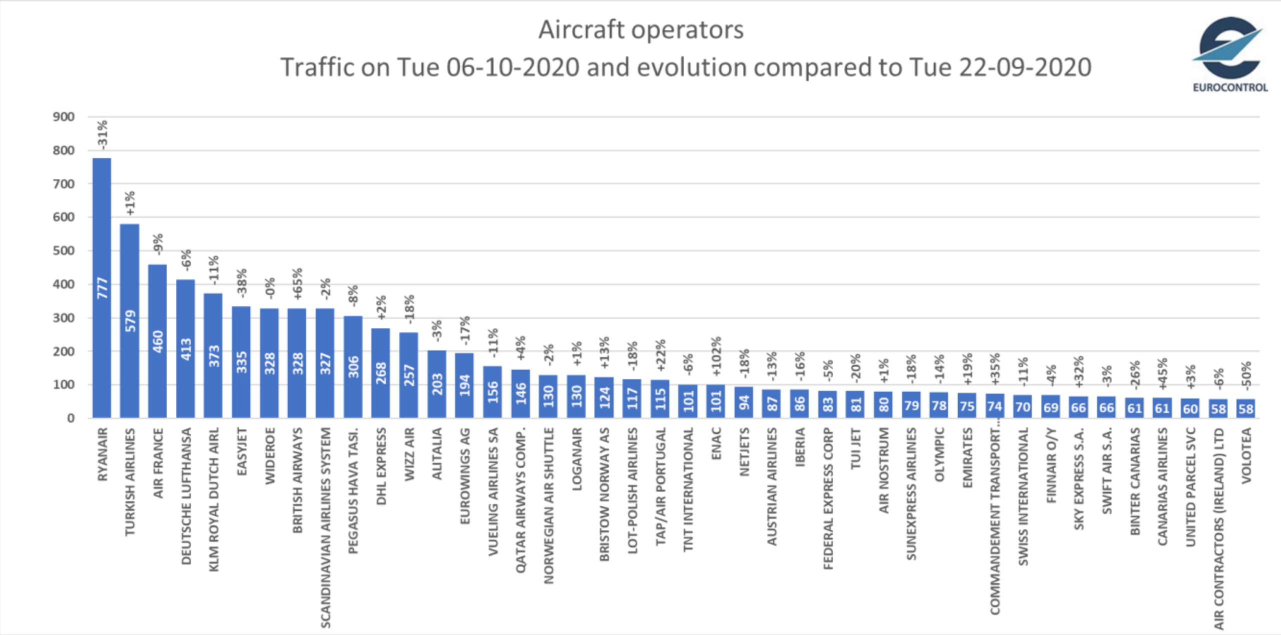
Overall situation against EUROCONTROL traffic scenarios:

- 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, the traffic was fully in line with the traffic scenario with -54%. For the moment, over the first 6 days of October, the traffic is also fully in line with -56%.

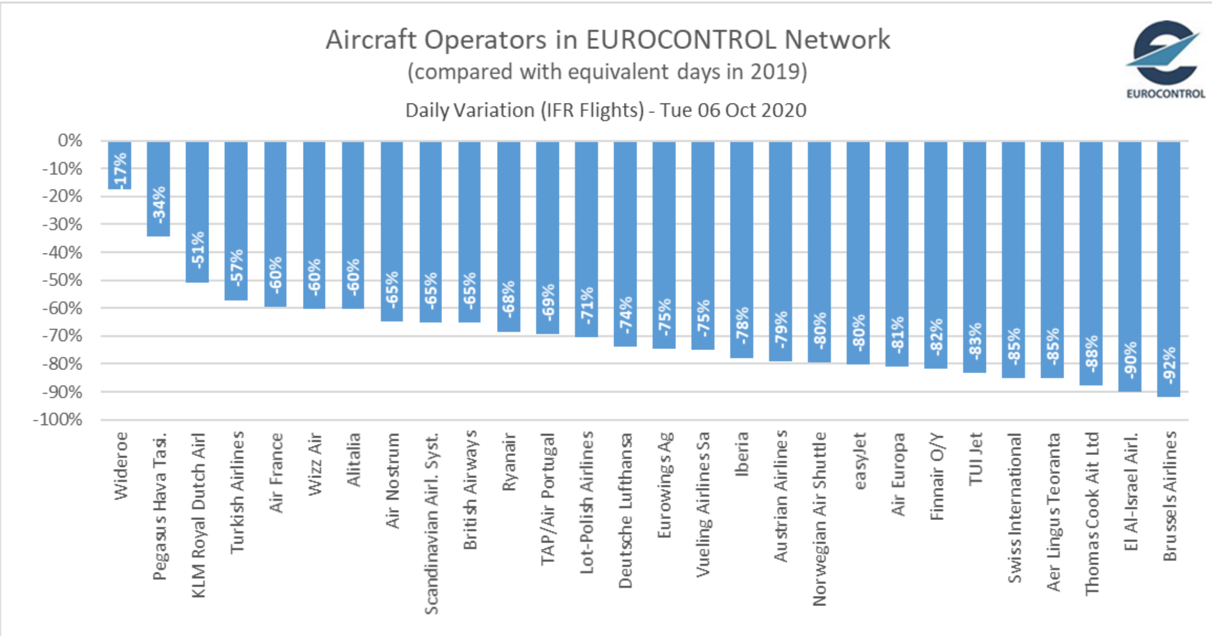


European Airlines:

- Ryanair was, by far, the airline with the highest number of flights with 777 flights on Tuesday 6 October showing a decrease of -31% compared to Tuesday 22 September (-348 flights). By increasing its capacity by +1% (+4 flights), Turkish Airlines was the 2nd busiest operator with 579 flights, followed by Air France (460 flights, -9%, -47 flights), Lufthansa (413 flights, -6%, -25 flights), KLM (373 flights, -11%, -44 flights), easyJet (335 flights, -38%, -205 flights) and British Airways (328 flights, +65%, +129 flights).
- Compared to two weeks ago, British Airways was the carrier which has increased the most its capacity (+129 flights) followed by ENAC (+51) and TAP (+21). Many big airlines decreased their capacity: Ryanair (-348), EasyJet (-205), Wizz Air (-58), Volotea (-57), Air France (-47), KLM (-44) and Eurowings (-39).



- Compared to 2019, Widerøe operated at -17% on Tuesday 6 October followed by Pegasus (-34%), KLM (-51%), Turkish Airlines (-57%), Air France (-60%), Wizz Air (-60%), British Airways (-65%), Ryanair (-68%), Lufthansa (-74%) and easyJet (-80%).



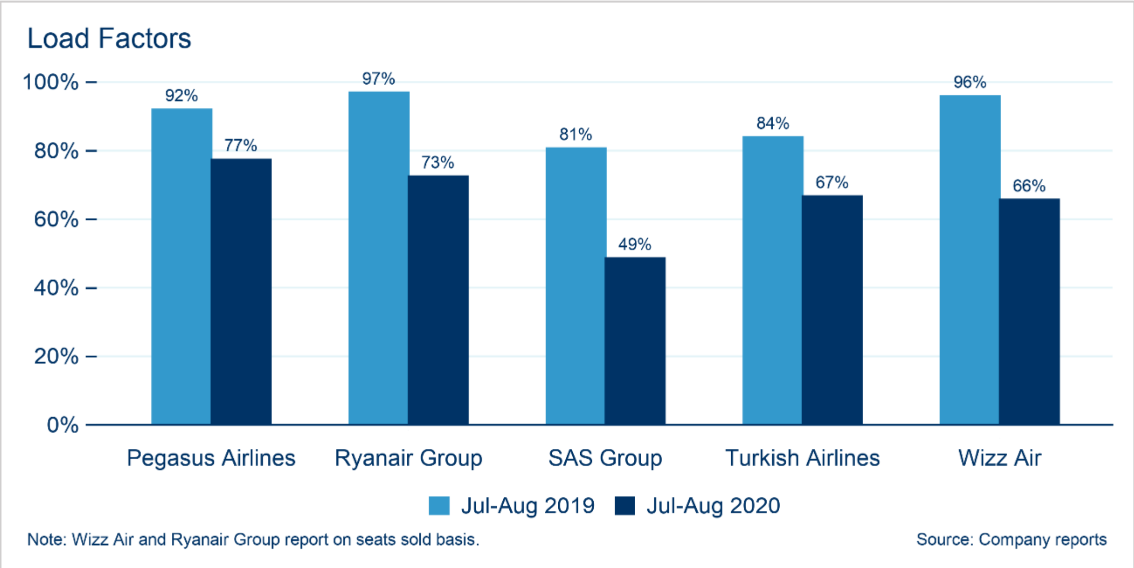
News from key European airlines:

- **Air France** reports 30% load factor in August.
- **Air Serbia** increasing frequency to Zurich from 14 to 19 times weekly.
- **Austrian Airlines** revises its winter capacity levels from 50% of 2019 to 30%.
- **British Airways** resumes services to a number of long haul destinations, including South Africa, Bahrain, the Seychelles, the Maldives and Barbados; operates final commercial 747 services.
- **Brussels Airlines** increasing capacity on African routes with extra frequencies during December.
- **El Al** resuming services to Greece, New York, London and Paris in October.

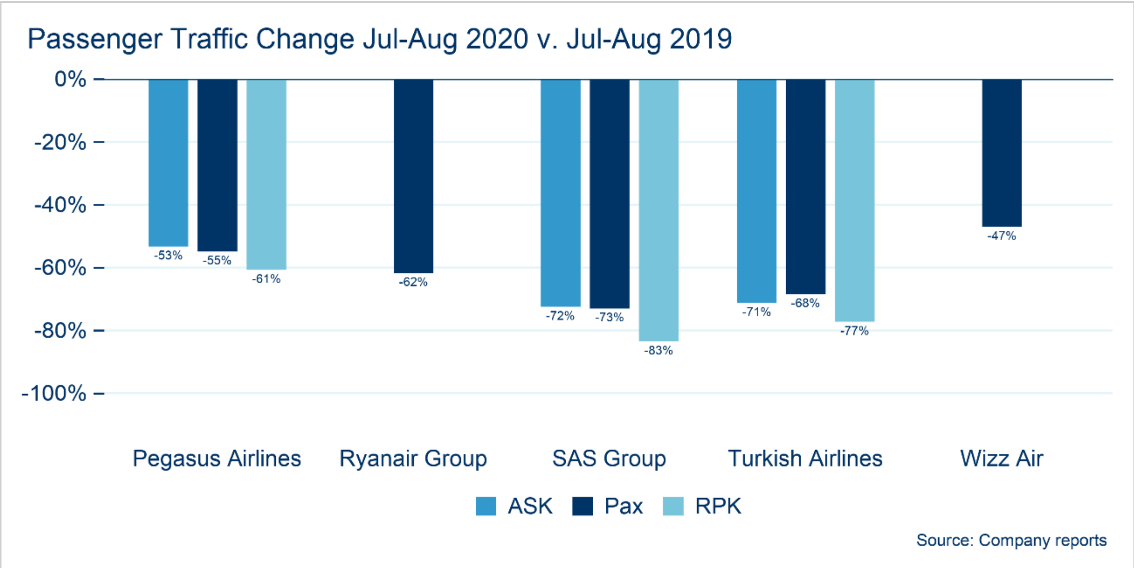
- **KLM** submits restructuring plan to Ministry of Finance, a condition of obtaining a government loan and guarantees.
- **LOT Polish Airlines** resumes service to Belgrade.
- **Ryanair** plans to launch five new Italian domestic routes, operated by Malta Air.
- **Turkish Airlines** resuming Istanbul-Hurghada service, delays launch of services to Newark and Vancouver, plans services to Mombasa, Seychelles, Havana, Caracas, Shanghai and Beijing from December.
- **Virgin Atlantic** is introducing pre-flight testing at Heathrow for cabin crew and pilots.
- **Wizz Air** launching several domestic services within Italy, in part using new base in Catania.

Load factors:

- According to public airlines reports, Load Factors decreased significantly in July-August 2020 compared to July-August 2019 reaching 77% for Pegasus, 73% for Ryanair Group, 49% for SAS Group, 67% for Turkish Airlines and 66% for Wizz Air.

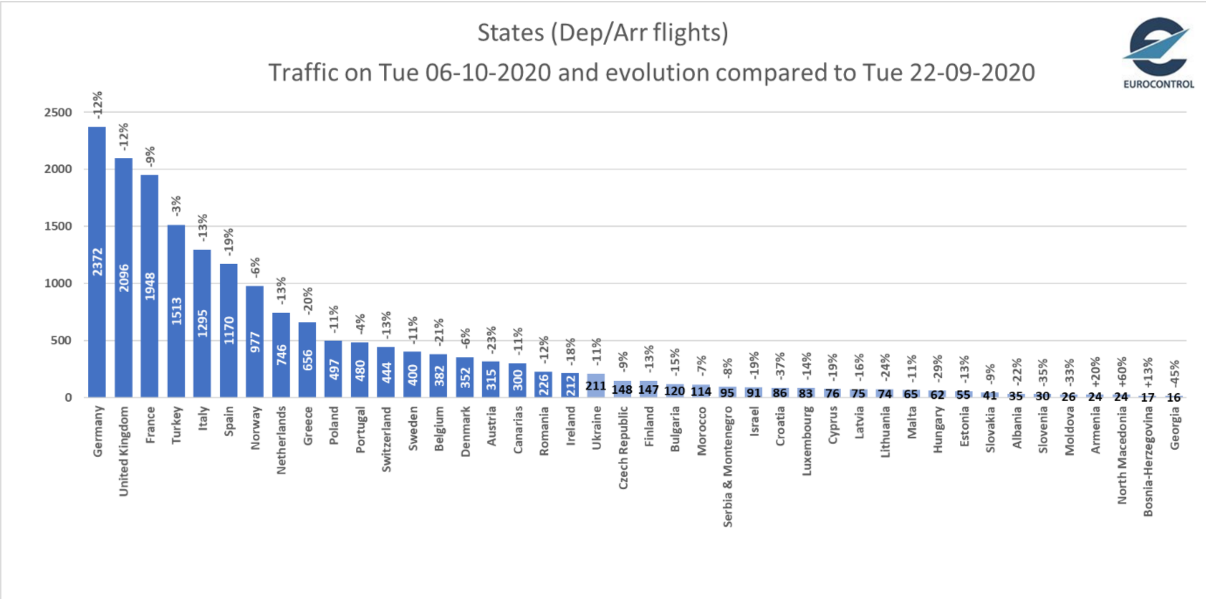


- From the same public airlines reports, the decrease in passenger traffic in July-August 2020 vs. 2019 ranged from -47% for Wizz Air to -73% for SAS Group.

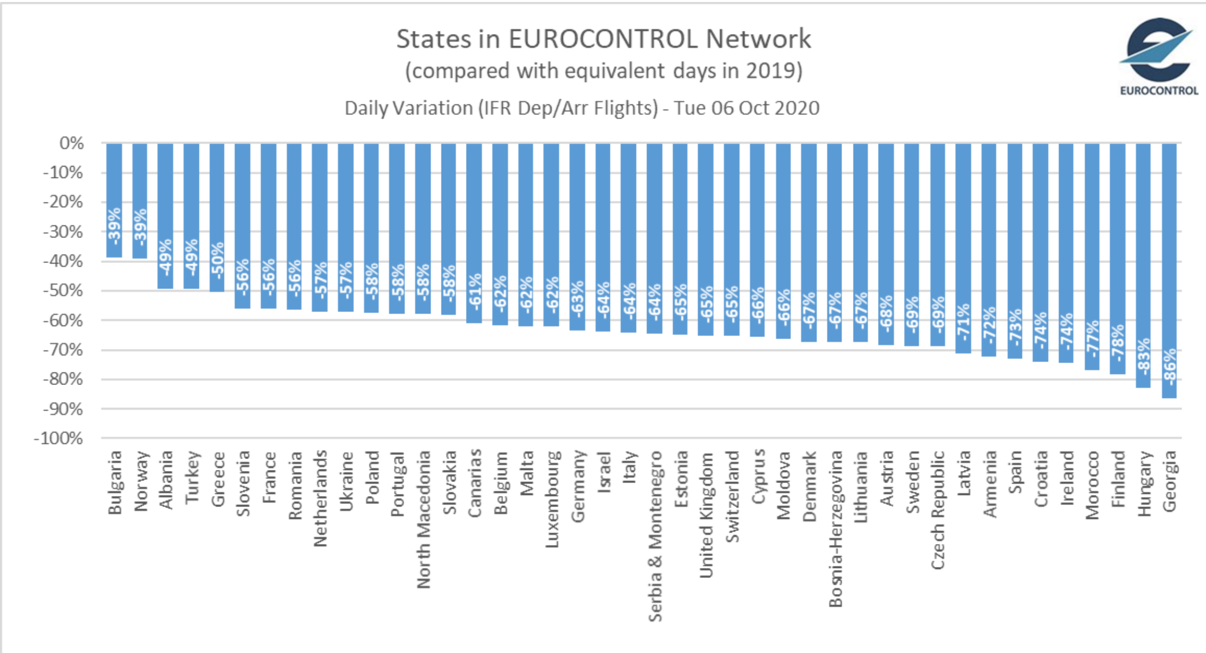


States

- Based on traffic levels, the Top 6 busiest States[1] is stable with Germany with 2372 flights on Tuesday 6 October (-12% over 2 weeks) followed by the UK (2096, -12%), France (1948, -9%), Turkey (1513, -3%), Italy (1295, -13%), Spain (1170, -19%), Norway (977, -6%), Netherlands (746, -13%), Greece (656, -20%) and Poland (497, -11%).



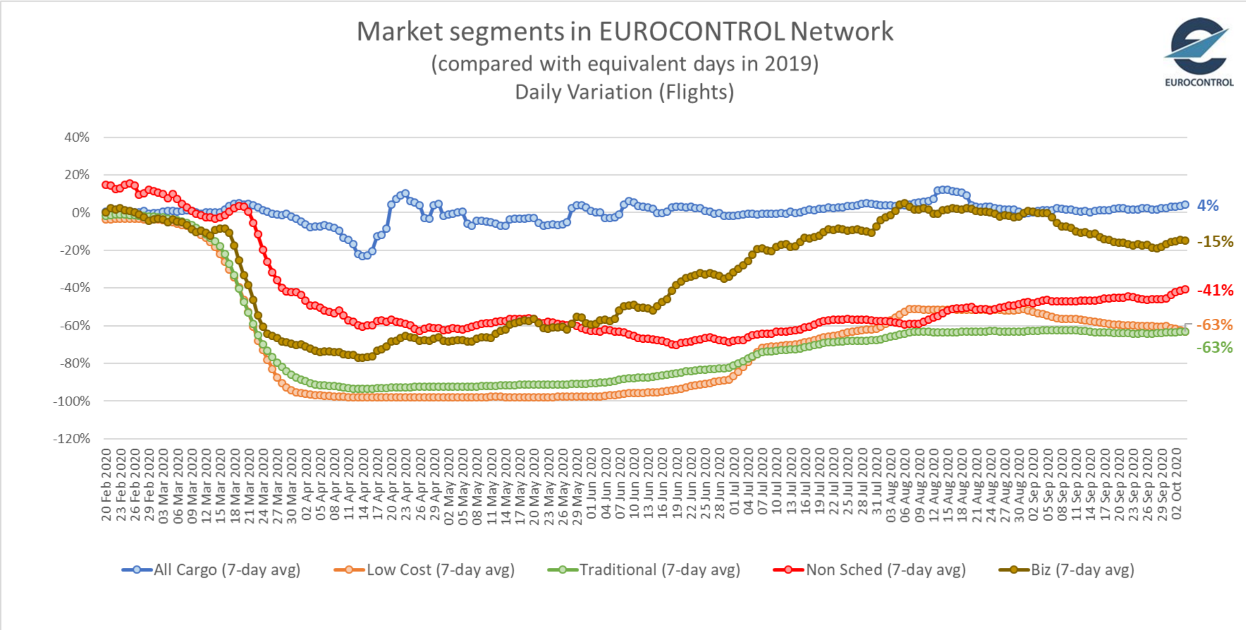
- Compared to 2019, Departure/Arrival traffic in Spain was -73% on Tuesday 6 October, the UK (-65%), Italy (-64%), Germany (-63%), France (-56%) and Turkey (-49%).



[1] excluding overflights.

Market Segments:

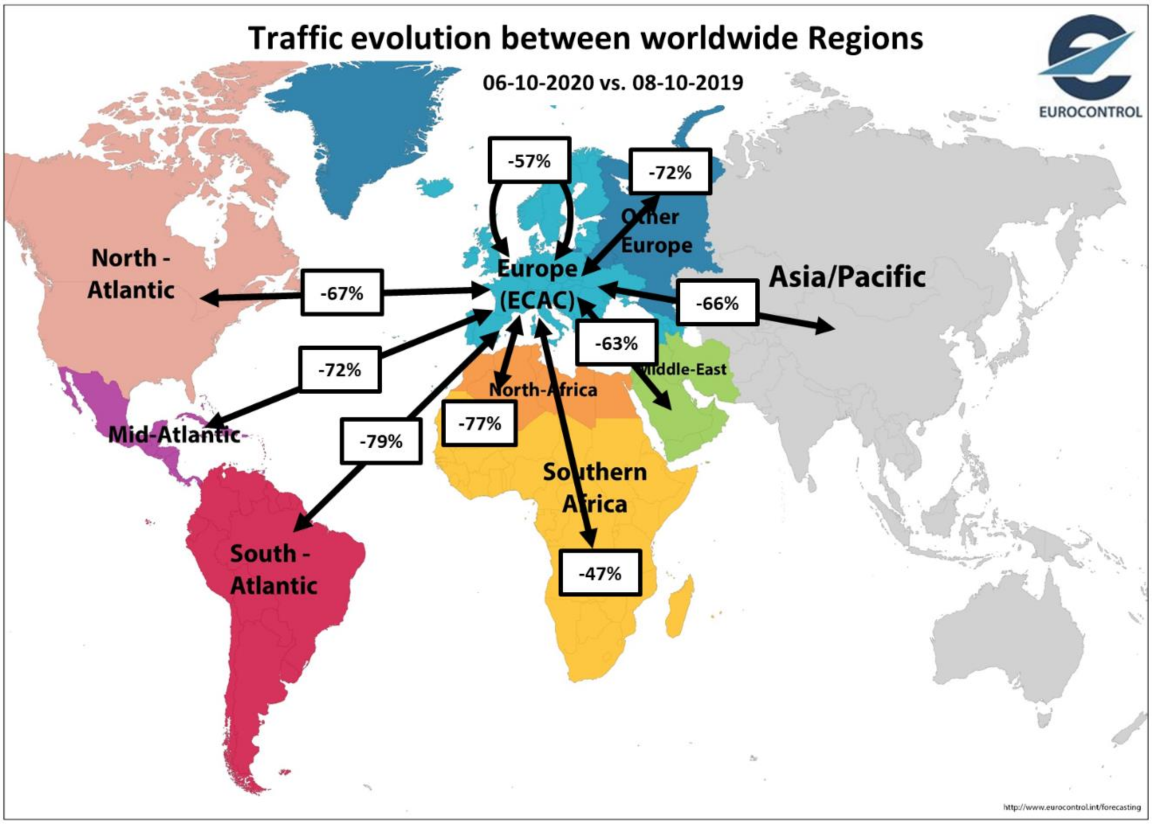
- Business Aviation recovery has been losing pace since early September (reaching -15% vs. 2019) while all-cargo remains stable at 2019 levels (+4%).
- Low-cost flights recorded a faster recovery during the summer but decreased early September with -63% vs 2019. Charter flights are increasing since October reaching -41%.

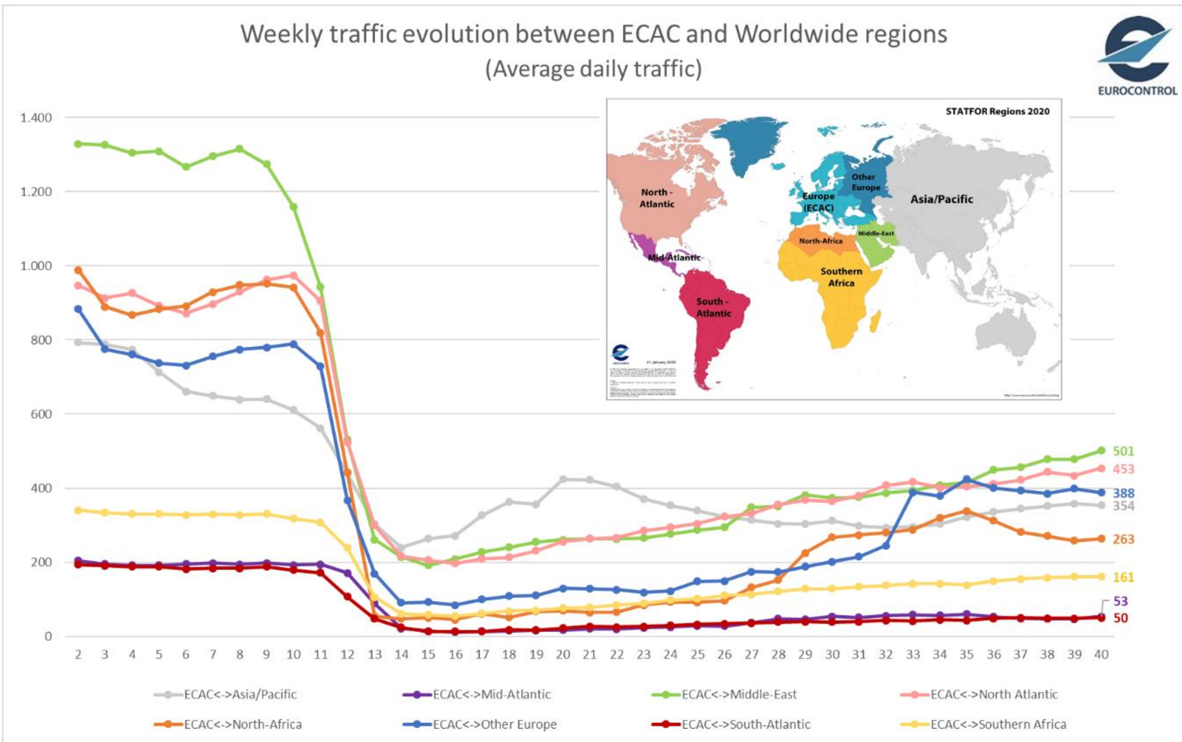


2. Traffic Flows & Country Pairs

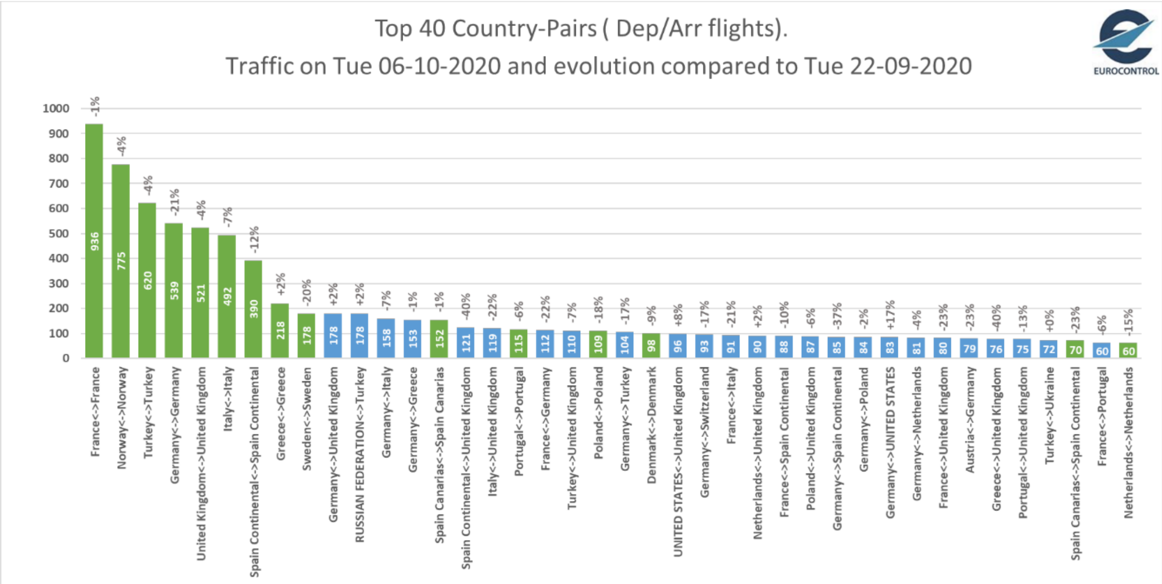
- The main traffic flow is the intra-Europe flow with 10,807 flights on Tuesday 6 October, which is decreasing (-12%) compared to Tuesday 22 September.
- The top traffic flows with Europe were with “Middle-East” (439 flights, +8%) followed by “North-Atlantic” (420 flights, +7%), “Other Europe” (316 flights, -9%), “Asia/Pacific” (270 flights, -14%) and “North-Africa” (209 flights, +2%).
- Intra-Europe flights are at -57% compared to 2019 while all other flows are at -68%.

REGION	22-09-2020	06-10-2020	%	vs. 2019
Intra-Europe	**12.259**	**10.807**	***-12%***	***-57%***
Europe<->Asia/Pacific	314	270	*-14%*	*-66%*
Europe<->Mid-Atlantic	37	38	*+3%*	*-72%*
Europe<->Middle-East	407	439	*+8%*	*-63%*
Europe<->North Atlantic	394	420	*+7%*	*-67%*
Europe<->North-Africa	205	209	*+2%*	*-77%*
Europe<->Other Europe	349	316	*-9%*	*-72%*
Europe<->South-Atlantic	38	41	*+8%*	*-79%*
Europe<->Southern Africa	165	158	*-4%*	*-47%*
Non Intra-Europe	**1.909**	**1.891**	***-1%***	***-68%***


Traffic evolution between worldwide Regions
06-10-2020 vs. 08-10-2019
EUROCONTROL
-57%
-72%
Other Europe
North - Atlantic
-67%
Europe (ECAC)
-66%
Asia/Pacific
-63%
-72%
Middle-East
North-Africa
Mid-Atlantic
-79%
-77%
Southern Africa
South - Atlantic
-47%
http://www.eurocontrol.int/forecasting


Weekly traffic evolution between ECAC and Worldwide regions
(Average daily traffic)
EUROCONTROL
STATFOR Regions 2020
1.400
1.200
1.000
800
600
400
200
0
501
453
388
354
263
161
53
50
ECAC<->Asia/Pacific
ECAC<->Mid-Atlantic
ECAC<->Middle-East
ECAC<->North Atlantic
ECAC<->North-Africa
ECAC<->Other Europe
ECAC<->South-Atlantic
ECAC<->Southern Africa

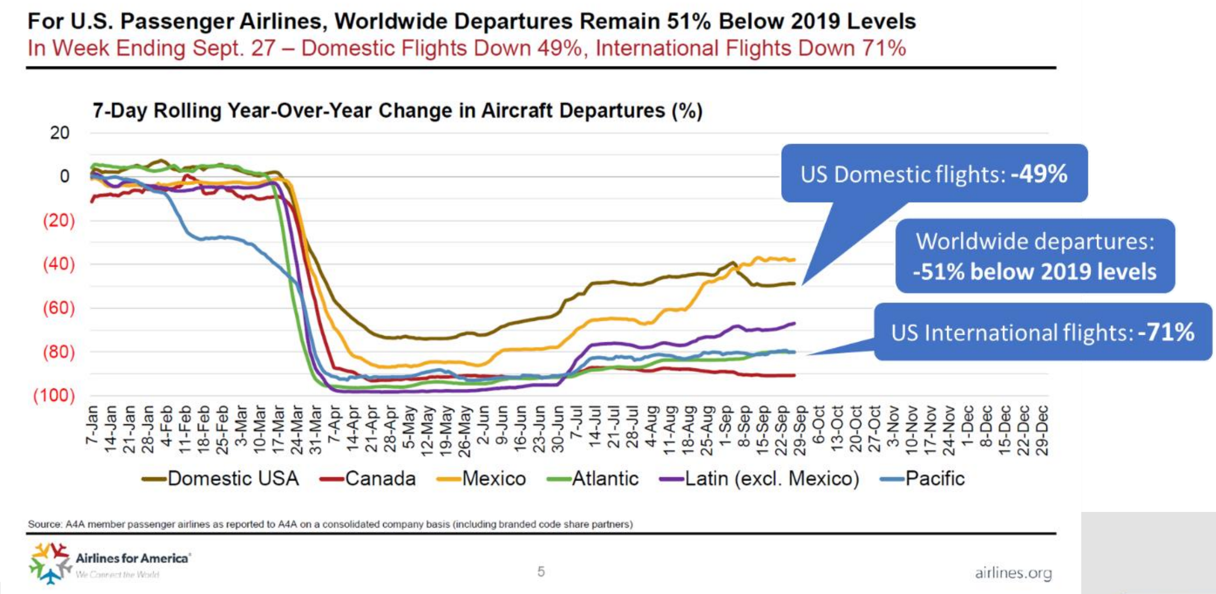
- Domestic flows are the most active flows (i.e. 9 of the top 10 flows are domestic). From the top domestic flows, only Greece showed an increase with 2%. All other domestic flows decreased like in Germany (-21%), Spain (-12%), Norway (-4%), Turkey (-4%), UK (-4%) and France (-1%).



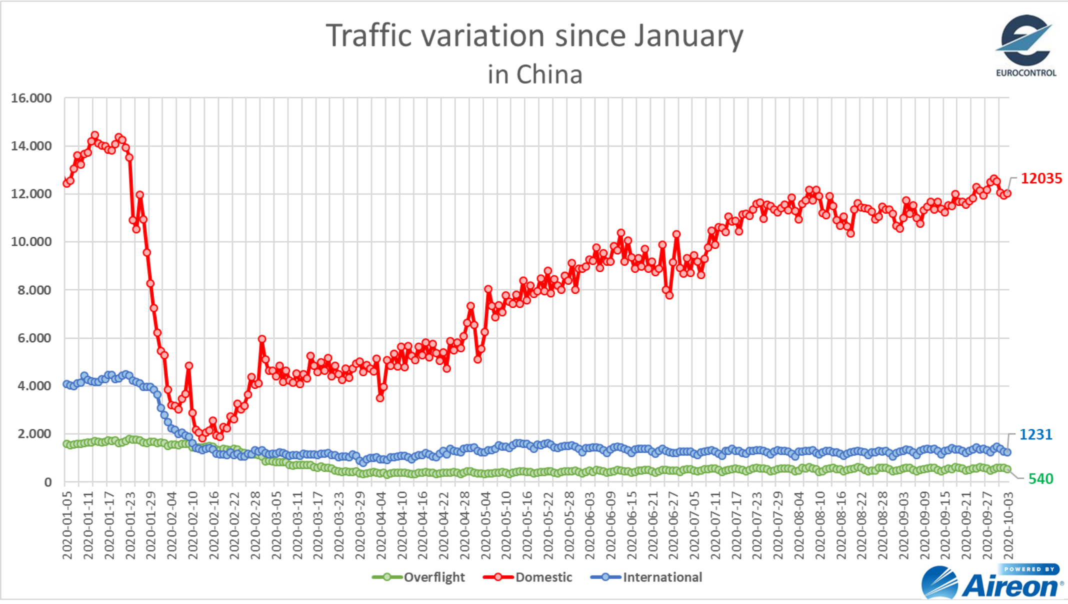
- The busiest non domestic flows were UK-Germany (178 flights, +2%) followed by Russia-Turkey (178 flights, +2%), Germany-Italy (158, -7%) and Germany-Greece (153, -1%).

3. Situation outside Europe

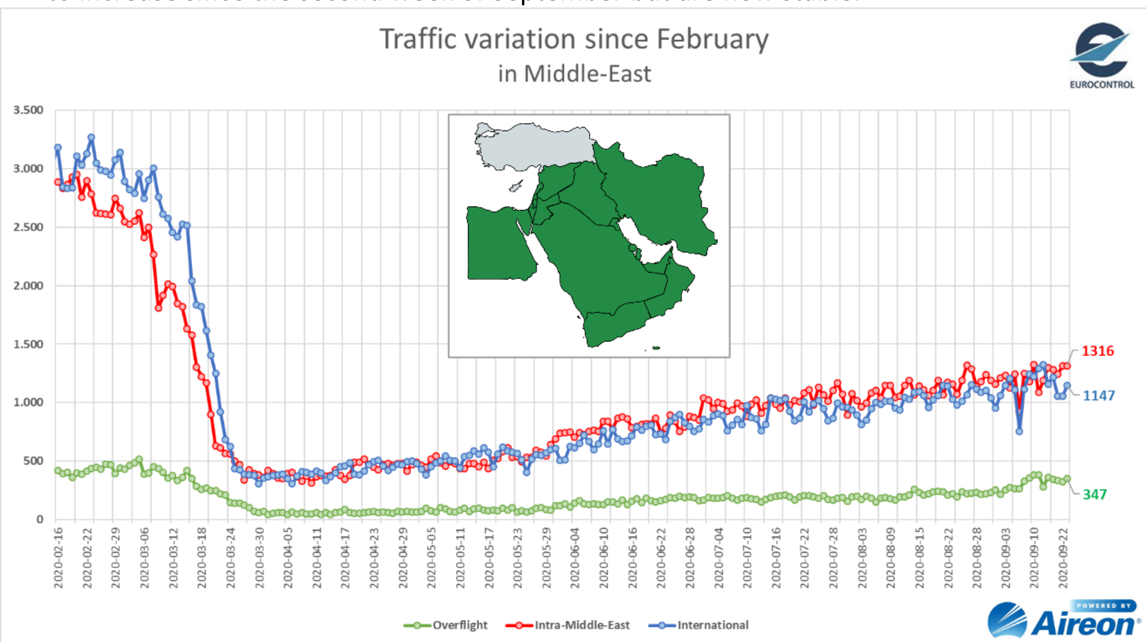
- **United-States:**
  - US domestic traffic has improved since early June with a noticeable step change on 1st July. After a decrease early September, the domestic flow is now stable at -50% of 2019. International flows slightly increased to -71% except flows to/from Mexico (around -38%).
  - In week ending September 27, U.S. airlines passenger volumes remained 67% below year-ago levels with Domestic Air Travel Down 66% and International Down 83%.
  - The domestic U.S. Load Factor averaged 57% in most recent week, versus 85% a year earlier.



- **China:**
  - Chinese domestic flights are now stable with 12,035 flights, back pre-COVID levels. The number of International flights has been stable since March (with 1,231 flights, i.e. still 70% below pre-COVID levels). The same is true for overflights (540).



- **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.

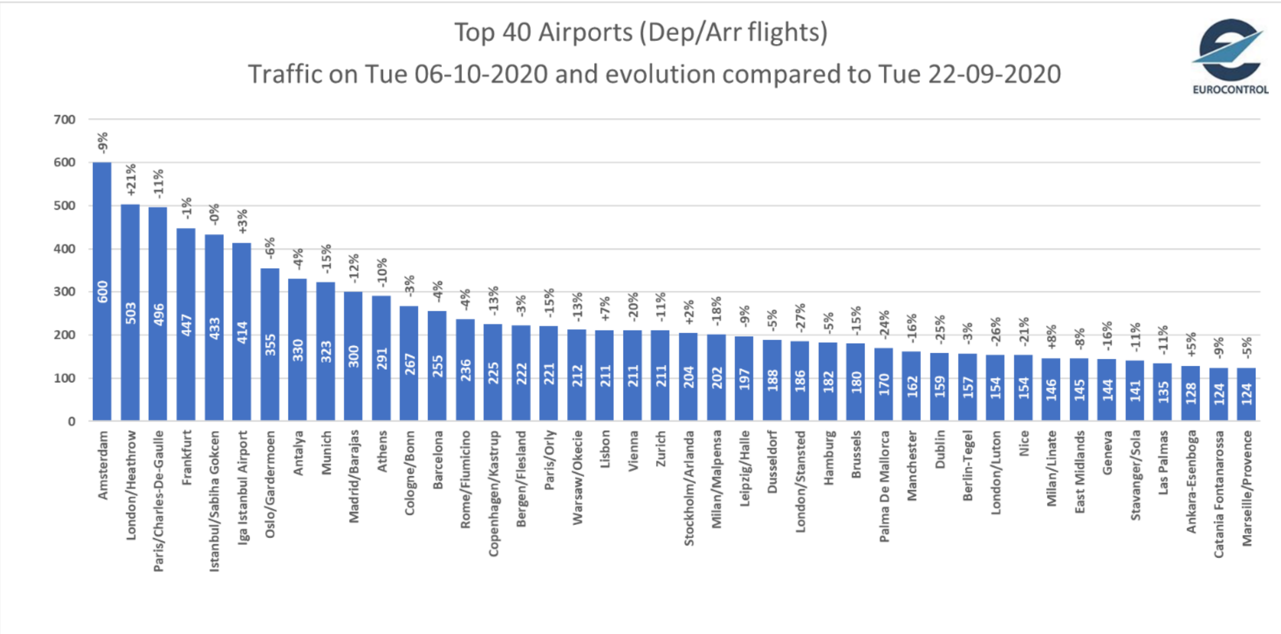


News for worldwide airlines and ANSPs:

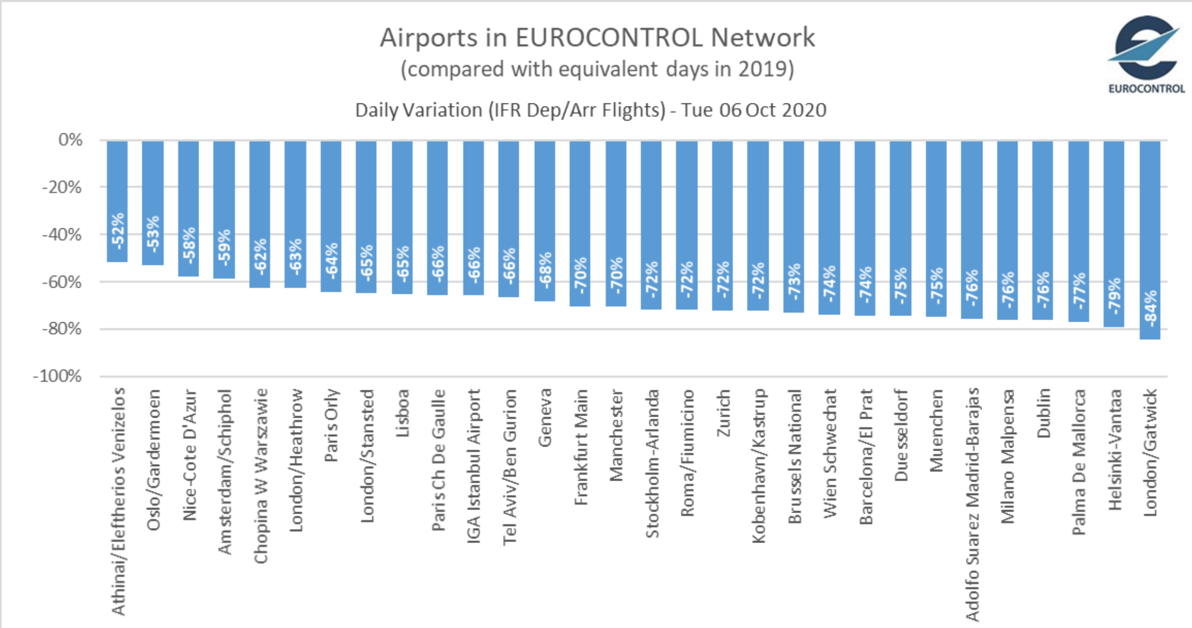
- **Air India** plans to operate additional services to the UK between 25 October and 31 December and to commence a service to New York Newark; suspends services to Germany following a withdrawal of approval to operate.
- **American Airlines** launching pre-flight testing for Jamaica, the Bahamas, Costa Rica and Hawaii – to exempt passengers from quarantine requirement; reduces winter frequencies to Europe.
- **Delta Air Lines** reducing frequency to Madrid and suspending JFK-Barcelona and Boston-Dublin services.
- **JAL Group** passenger numbers down in August (international by 96.9%, domestic by 71.7%); JAL moving focus from international business travel to its low cost network.
- **Qatar Airways** delays resumption of services to Sarajevo and Skopje; resumes services to South Africa.
- **United Airlines** to resume 49% of domestic schedule in November – and services from Frankfurt to Denver and Houston.

4. Airport Information

- Amsterdam was the busiest airport with 600 Dep/Arr flights on 6 October (-9% over the last 2 weeks), followed by London/Heathrow (503, +21%), Paris CDG (496, -11%), Frankfurt (447, -1%), Istanbul/Sabiha (433, -0%), İGA Istanbul Airport (414, +3%), Oslo (355, -6%), Antalya (330, -4%), Munich (323, -15%), Madrid (300, -12%) and Athens (291, -10%).
- From the top airports, only two presented an increase over 2 weeks: London/Heathrow (+21%) and İGA Istanbul Airport (+3%). Most airports reported a decrease like Munich (-15%), Madrid (-12%), Paris CDG (-11%), Athens (-10%), Amsterdam (-9%) and Antalya (-4%). Frankfurt and Istanbul/Sabiha were stable.



- Compared to 2019, Athens operated at -52% on 6 October, Amsterdam (-59%), London Heathrow (-63%), Paris CDG (-66%), İGA Istanbul Airport (-66%), Frankfurt (-70%), Roma (-72%) and Madrid (-76%).

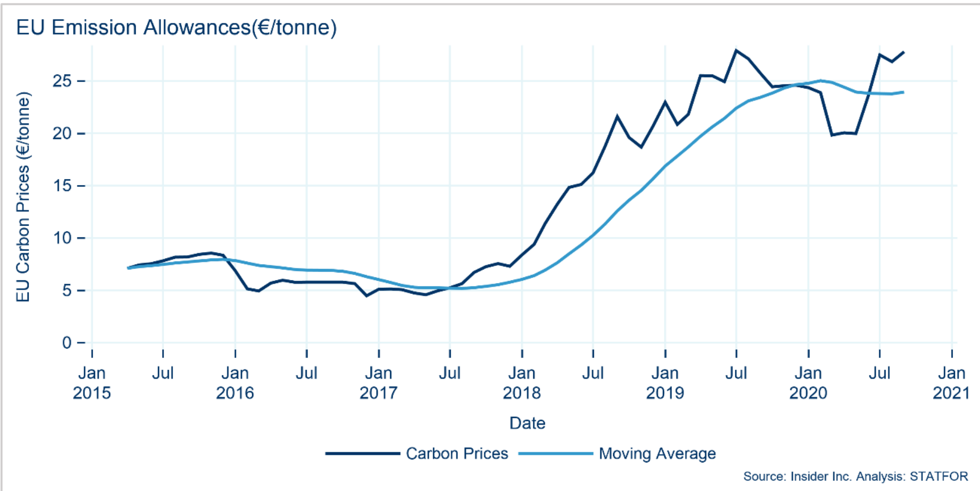


News from European airports:

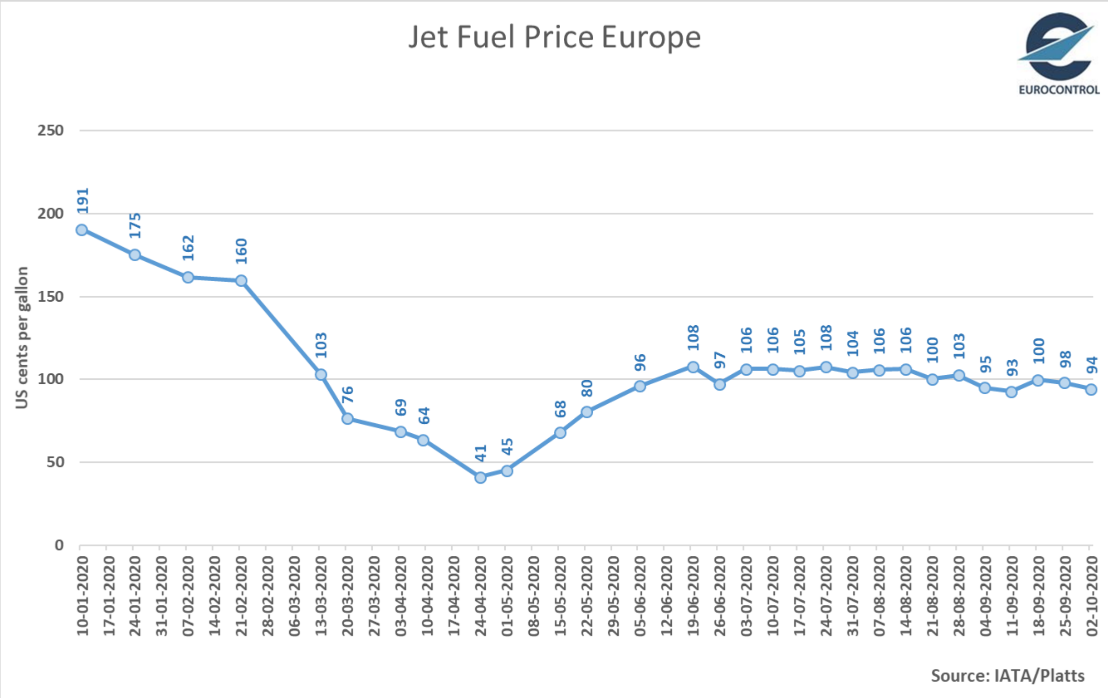
- **Vienna Airport** agrees with employees to extend short time working until the end of January and pauses the renovation of the east pier and the expansion of Terminal 3.
- **Manchester Airport** announces that Terminal 2 remains closed until further notice.
- **Kiev Airport** to launch fast (6 hour) PCR tests.
- **Berlin Brandenburg Airport** receives airport operating certificate.

5. Economic, other factors

- **EU Emission Allowance:** From March till May, the EU carbon prices decreased to reach 20€/ton before rising to 27 in July and August.



- **Fuel Price:** After having remained stable slightly above 100 cts/gal since early July, fuel price decreased to reach 94cts/gal on 2 October 2020.



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