Traffic Situation & Airlines Recovery

- 12,221 flights on Tuesday 20 October, (-6% with -805 flights vs. 6 Oct) reaching 39% 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 -56.6% compared to 2019. Over 1-20 October traffic is -56%, in line with the scenarios for the moment but the situation will deteriorate with the restart of the pandemic.
- Airlines are reporting very low forward booking rates until end of 2020 compared to normal.
- **Ryanair remains the busiest carrier with 600 flights** on Tuesday 20 October showing a decrease of -23% compared to Tuesday 6 October (-177 flights). Most major airlines decreased their capacity except Air France (473 flights, +3%, +13 flights), SAS (334 flights, +2%, +7 flights) and Pegasus (308 flights, +1%, +2 flights). Turkish Airlines was the 2nd busiest operator with 560 flights (-3%, -19 flights), followed by Air France (473 flights, +3%, +13 flights), Lufthansa (376 flights, -9%, -37 flights) and KLM (348 flights, -7%, -25 flights).
- Over 2 weeks, most big airlines decreased their capacity: Ryanair (-177), easyJet (-61), BA (+58), Lufthansa (-37), Eurowings (-35), KLM (-25), TAP (-23), Vueling (-23), TUI Jet (-20) and Turkish Airlines (-19). Only a few like Transavia increased their capacity (+28 flights) followed by Swift Air (+14) and Air France (+13).
- Compared to 2019, Widerøe operated at -17% on Tuesday 20 October followed by Pegasus (-35%), KLM (-54%), Air France (-57%), Turkish Airlines (-58%), Wizz Air (-61%), British Airways (-72%), Ryanair (-76%), Lufthansa (-76%) and easyJet (-84%).
- Compared to 2019, Departure/Arrival traffic in Spain was -75% on Tuesday 20 October, the UK (-71%), Italy (-66%), Germany (-64%), France (-56%), Turkey (-53%) and Norway (-40%).
- Business Aviation recovery has been gaining pace since early October (reaching -9% vs. 2019) while all-cargo remains stable at 2019 levels (+3%). Low-cost flights decreased early September and even more in October with -67% vs 2019. Charter flights increased since October reaching -35%.

Traffic Flows & Country Pairs

- The intra-Europe flow is the main flow with 9,918 flights on 20 Oct (-8% on 6 Oct). Top traffic flows with Europe were with "Middle-East" (434 flights, -1%) followed by "North-Atlantic" (390 flights, -7%), "Asia/Pacific" (319 flights, +19%), "Other Europe" (317 flights, +0%), and "North-Africa" (234 flights, +12%).
- Intra-Europe flow is at -60% compared to 2019 while all other flows are at -68%.
- From the top domestic flows, Sweden (+10%), Germany +6%) and Italy (+5%) increased over 2 weeks. All other domestic flows decreased like in Greece (-14%), Spain (-12%), the UK (-11%), France (-10%) and Turkey (-4%).
- The busiest non domestic flows were Turkey-Russia (158 flights, -11%) followed by Germany-Italy (155 flights, -2%), Germany-Greece (142 flights -7%) and Germany-UK (140, -21%).
- Compared to 2019, domestic flows within the UK and Sweden were -53% on Tuesday 20 Oct, followed by Spain (-53%), Germany (-51%), Italy (-35%), Greece (-34%), Turkey (-33%); France (-23%) and Norway (-19%).

Airport Information

- After having reached -69% in August compared to August 2019, passenger traffic started to decrease since mid-August to reach **2.1 million passengers** on Sunday 10 October (-72% compared to 2019). Overall, since 1st January 2020, Europe experienced a **loss of 1.3 billion passengers** over 2019 (-81%).
- **Amsterdam was the busiest airport** with 560 Dep/Arr flights on 20 Oct (-7% over the last 2 weeks), followed by Paris CDG (492, -1%), London/Heathrow (452, -10%), Frankfurt (443, -1%), Istanbul/Sabiha (429, -1%), IGA Istanbul Airport (408, -1%), Oslo (341, -4%), Munich (303, -6%), Madrid (300, +0%) and Antalya (272, -18%).
- From the top 12 airports, only Paris/Orly showed an increase (+14%) over 2 weeks. Madrid (+0%) was stable and all airports reported a decrease like London/Heathrow (-10%), Athens (-8%), Amsterdam (-7%), Munich (-6%), Paris/CDG (-1%), Frankfurt (-1%), Istanbul /Sabiha (-1%) and IGA Istanbul Airport (-1%).
- Compared to 2019, Athens operated at -53% on 20 Oct, Amsterdam (-62%), Paris CDG (-66%), London Heathrow (-66%), IGA Istanbul Airport (-66%), Frankfurt (-70%), Roma (-73%) and Madrid (-75%).

Economic

- **Fuel price:** Fuel price is stable at 104cts/gal on 16 October 2020.
1. Traffic Situation and Airlines Recovery

- 12,221 flights on Tuesday 20 October, (-6% with -805 flights compared to Tuesday 6 October). This is 39% of 2019 traffic levels. Based on a 7-day moving average, the decrease is -56.6% compared to 2019 which is now degrading since early September. Yesterday, Ryanair and EasyJet removed 238 flights compared to 2 weeks ago.
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.

- Over the first 20 days of October, the traffic is fully in line with -56% for the moment but the situation will deteriorate with the restart of the pandemic.

European Airlines:

- Ryanair was the airline with the highest number of flights with 600 flights on Tuesday 20 October showing a decrease of -23% compared to Tuesday 6 October (-177 flights). Most major airlines decreased their capacity except Air France (473 flights, +3%, +13 flights), SAS (334 flights, +2%, +7 flights) and Pegasus (308 flights, +1%, +2 flights). Turkish Airlines was the 2nd busiest operator with 560 flights (-3%, -19 flights), followed by Air France (473 flights, +3%, +13 flights), Lufthansa (376 flights, -9%, -37 flights) and KLM (348 flights, -7%, -25 flights).

- Compared to two weeks ago, Transavia was the carrier which has increased the most its capacity (+28 flights) followed by Swift Air (+14) and Air France (+13). Most big airlines decreased their capacity: Ryanair (-177), easyJet (-61), British Airways (+58), Lufthansa (-37), Eurowings (-35), KLM (-25), TAP (-23), Vueling (-23), TUI Jet (-20) and Turkish Airlines (-19).
Compared to 2019, Widerøe operated at -17% on Tuesday 20 October followed by Pegasus (-35%), KLM (-54%), Air France (-57%), Turkish Airlines (-58%), Wizz Air (-61%), British Airways (-72%), Ryanair (-76%), Lufthansa (-76%) and easyJet (-84%).
News from key European airlines:

- **Austrian Airlines** plans to trial COVID-19 antigen tests at Vienna.
- **El Al** plans to resume Tel Aviv services to Frankfurt, Amsterdam, Zurich, Belgrade, Sofia and Kiev.
- **Finnair** selling business class ready meals at a supermarket.
- **Lufthansa** plans to resume Munich-Genoa service; suspending winter services to Addis Ababa, Almaty, Austin, Baku, Panama City, Qingdao; postponing the introduction of new business class to 2022.
- **Ryanair** reducing is November to March capacity down from 60% of its 2019 schedule to 40%.
- **Transavia** plans to launch Brussels-Innsbruck service in December.
- **Turkish Airlines** plans to resume Istanbul to Vilnius service (as Lithuanian citizens are not subject to self-isolation at either end).

States

- Based on traffic levels, the Top 6 busiest States\(^1\) is stable. Germany had 2312 flights on Tuesday 20 October (-3% over 2 weeks) followed by France (1851, -5%), the UK (1767, -16%), Turkey (1367, -10%), Italy (1197, -8%), Spain (1026, -12%), Norway (971, -1%), Netherlands (709, -5%), Greece (571, -13%), Portugal (418, -13%) and Poland (412, -17%).

\(^1\) excluding overflights.

- Compared to 2019, Departure/Arrival traffic in Spain was -75% on Tuesday 20 October, the UK (-71%), Italy (-66%), Germany (-64%), France (-56%), Turkey (-53%) and Norway (-40%).
Market Segments:

- Business Aviation recovery has been gaining pace since early October (reaching -9% 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 and even more in October with -67% vs 2019. Charter flights increased since October reaching -35%.
2. Traffic Flows & Country Pairs

- The main traffic flow is the intra-Europe flow with 9,918 flights on Tuesday 20 October, which is decreasing (-8%) compared to Tuesday 6 October.
- The top traffic flows with Europe were with “Middle-East” (434 flights, -1%) followed by “North-Atlantic” (390 flights, -7%), “Asia/Pacific” (319 flights, +19%), “Other Europe” (317 flights, +0%), and “North-Africa” (234 flights, +12%).
- Intra-Europe flights are at -60% compared to 2019 while all other flows are at -68%.
Domestic flows are the most active flows (i.e. 9 of the top 10 flows are domestic). From the top domestic flows, Sweden (+10%), Germany (+6%) and Italy (+5%) showed an increase over 2 weeks. All other domestic flows decreased like in Greece (-14%), Spain (-12%), the UK (-11%), France (-10%), Turkey (-4%) and Norway (-0%).

The busiest non domestic flows were Turkey-Russia (158 flights, -11%) followed by Germany-Italy (155 flights, -2%), Germany-Greece (142 flights -7%) and Germany-UK (140, -21%).
• Compared to 2019, domestic flows within the UK and Sweden were -58% on Tuesday 20 October 2020, followed by Spain (-53%), Germany (-51%), Italy (-35%), Greece (-34%), Turkey (-33%); France (-23%) and Norway (-19%).

3. Situation outside Europe

• United-States (A4A members):
  o 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 -47% of 2019. International flows increased to -65% notably to Latin America and Mexico (reaching -32%).
  o In week ending Oct 13, U.S. airlines passenger volumes remained 64% below year-ago levels with Domestic Air Travel down 62% and International down 79%.
  o The domestic U.S. Load Factor averaged 59% in most recent week, versus 85% a year earlier.
• **China:**
  - Chinese domestic flights are now stable with 11,793 flights, back pre-COVID levels. The number of International flights has been stable since March (with 1,359 flights, i.e. still 70% below pre-COVID levels). The same is true for overflights (574).

• **Middle East:**
  - Since the beginning of April, Intra-Middle-East traffic has been increasing slowly reaching 1,392 flights on 19 October. International traffic has been recovering at the same levels as domestic from early April but is slightly lagging behind (1,077 flights). Overflights have started to increase since the second week of September but are now stable (322 flights).
News for worldwide airlines and ANSPs:

- **Aeroflot** planning to resume services to Belgrade & Tokyo and to increase frequencies to New York, Minsk, the Maldives and Switzerland.
- **American Airlines** plans to deploy 737 MAX on its Miami-New York service from 29 December.
- **ANA** plans to raise $3.8 billion in subordinated loans and $1.9 billion in new shares; resumes its Tokyo-Brussels cargo only service; plans to operate 15% or originally planned international frequencies in November.
- **Cathay Pacific** states it expects to operate at less than 25% capacity for the first half of 2021 with a recovery after that dependent on vaccines against COVID-19.
- **China Southern Airlines** plans to raise $2.4 billion via convertible A-share bonds.
- **Qatar Airways** says it does not expect to operate A380s for at least the next couple of years.
- **Singapore Airlines** reports that in September passengers declined 98% with a load factor of 17%; cargo load factors increased despite a drop in cargo of 39% for the Group.

4. **Airport Information**

- Amsterdam was the busiest airport with 560 Dep/Arr flights on 20 October (-7% over the last 2 weeks), followed by Paris CDG (492, -1%), London/Heathrow (452, -10%), Frankfurt (443, -1%), Istanbul/Sabiha (429, -1%), İGA Istanbul Airport (408, -1%), Oslo (341, -4%), Munich (303, -6%), Madrid (300, +0%) and Antalya (272, -18%).
- From the top 12 airports, only Paris Orly showed an increase (+14%) over 2 weeks. Madrid (+0%) was stable and all airports reported a decrease like London/Heathrow (-10%), Athens (-8%), Amsterdam (-7%), Munich (-6%), Paris/CDG (-1%), Frankfurt (-1%), Istanbul/Sabiha (-1%) and İGA Istanbul Airport (-1%).

Compared to 2019, Athens operated at -53% on 20 October, Amsterdam (-62%), Paris CDG (-66%), London Heathrow (-66%), İGA Istanbul Airport (-66%), Frankfurt (-70%), Roma (-73%) and Madrid (-75%).
News from European airports:

- **Paris CDG** pax fall 80% to 1.4m in September (Orly down 60% to 1.0 million)
- **Amsterdam Schiphol** pax fall 79% to 1.3 million in September
- **Airports in France** are planned to have COVID-19 antigen testing, with Paris airports expected to be ready by the end of October.

Passengers:

- According to ACI, passenger traffic has remained stable in the Summer at -69% over August compared to August 2019. On Sunday 10 October, ACI reported 2.1 million passengers compared to 7.5 on Sunday 13 October 2019 (i.e. -72%). Overall, since January 2020, Europe experienced a loss of 1.3 billion passengers over 2019 (-81%).
5. Economic, other factors

- **Fuel Price:** After having remained stable slightly above 100 cts/gal since early July, fuel price is stable at 104 cts/gal on 16 October 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
   - 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.