EUROCONTROL

Wednesday, 28 October 2020

Traffic Situation & Airlines Recovery

- **11,917 flights on Tuesday 27 October, (-6% with -818 flights vs. 13 Oct) reaching 42% of 2019 levels.**
- The 7-day moving average is -56.3% compared to 2019.
- Over **1-27 October traffic is -57%**, in line with the scenarios for the moment but the situation is going deteriorate as a result of the second wave of the pandemic. A number of large network carriers have indicated to EUROCONTROL their intentions to further reduce capacity during the months of November and December, which will have a material impact on the total number of flights in the network.
- **Turkish Airlines was the airline with the highest number of flights** with 540 flights on Tuesday 27 Oct showing a decrease of -3% compared to Tuesday 13 October (-18 flights), followed by Ryanair (489 flights, -38%, -302 flights), Air France (454 flights, -1%, -6 flights), Lufthansa (416 flights, +4%, +15 flights), Wideroe (342 flights, +3%, +9 flights), KLM (333 flights, -8%, -27 flights) and British Airways (316 flights, +4%, +13 flights).
- Over 2 weeks, most big airlines decreased their capacity: **Ryanair (-302 flights)**, **Eurowings (-58)**, **Vueling (-57)**, **easyJet (-39)**, KLM (-27), TUI Jet (-27), SunExpress airlines (-27). Only a few like **Lufthansa increased their capacity (+15 flights)** followed by Qatar Airways (+13) and British Airways (+13).
- Compared to 2019, Widerøe operated at -13% on Tuesday 27 October followed by Pegasus (-39%), Wizz Air (-48%), KLM (-51%), Turkish Airlines (-56%), Air France (-57%), British Airways (-64%), Ryanair (-78%), Lufthansa (-76%) and easyJet (-85%).
- Compared to 2019, Departure/Arrival traffic in Spain was -71% on Tuesday 27 October, the UK (-69%), Italy (-64%), Germany (-62%), France (-55%), Turkey (-52%) and Norway (-36%).
- After having gaining pace since early October, **Business Aviation decreased since mid-October** (reaching -19% vs. 2019) while all-cargo remains stable at 2019 levels (+4%). **Low-cost flights decreased** early September and even more in October with -68% vs 2019. **Charter flights increased** since October reaching -35%.

Traffic Flows & Country Pairs

- **The intra-Europe flow is the main flow** with 9,558 flights on 27 Oct (-9% on 13 Oct). Top traffic flows with Europe were with **"Middle-East"** (486 flights, +4%) followed by **"North-Atlantic"** (384 flights, -1%), "Asia/Pacific" (324 flights, +11%), "Other Europe" (294 flights, -12%), and "North-Africa" (230 flights, +11%).
- **Intra-Europe flow is at -57%** compared to 2019 while all other flows are at -64%.
- **From the top domestic flows, Sweden (+9%) and UK (+4%) showed an increase over 2 weeks**. **All other domestic flows decreased** like in Greece (-15%), Italy (-10%), Turkey (-9%), Germany (-8%), Spain (-6%), France (-5%) and Norway (-2%).
- **The busiest non domestic flows** were **Germany-UK** (153, -6%), Germany-Italy (125 flights, -18%), France-Germany (117 flights +0%), Turkey-Russia (115 flights, -35%) and Spain-UK (113 flights, -22%).
- Compared to 2019, domestic flows within the UK were -56% on Tuesday 27 Oct 2020, followed by Germany (-48%), Spain (-45%), Greece (-45%), Sweden (-44%), Turkey (-39%), France (-26%) and Norway (-19%).

Airport Information

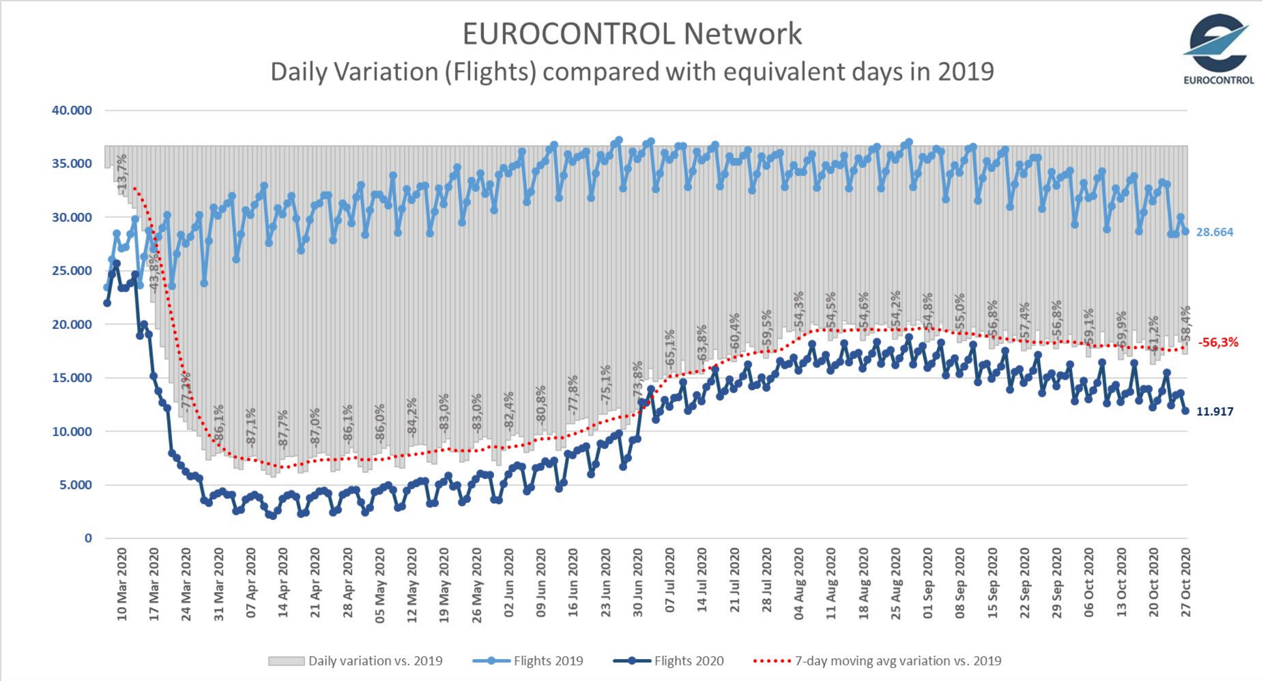
- **ACI EUROPE** warned on 27 Oct that some 193 airports would face insolvency in the coming months if passenger traffic does not start to recover by the year end. These airports facilitate 277,000 jobs and €12.4 billion of European GDP.
- **London/Heathrow was the busiest airport** with 524 Dep/Arr flights on 27 October (+7% over the last 2 weeks) followed by Amsterdam (515, -10%), Paris CDG (504, +4%), Frankfurt (450, +2%), İGA Istanbul Airport (441, +12%), Istanbul/Sabiha (376, -11%), Oslo (341, -4%), Munich (321, +3%) and Madrid (312, +8%).
- From the top 10 airports, **İGA Istanbul Airport showed the largest increase** (+12%) over 2 weeks, followed by Madrid (+8%), London/Heathrow (+7%), Paris/CDG (+4%), Munich (+3%) and Frankfurt (+2%). **All other airports reported a decrease like Athens** (-16%), Istanbul/Sabiha (-11%), Amsterdam (-10%) and Oslo (-4%).
- Compared to 2019, Athens operated at -53% on 27 October, London Heathrow (-60%), Amsterdam (-61%), İGA Istanbul Airport (-61%), Paris CDG (-62%), Frankfurt (-66%), Roma (-71%) and Madrid (-74%).

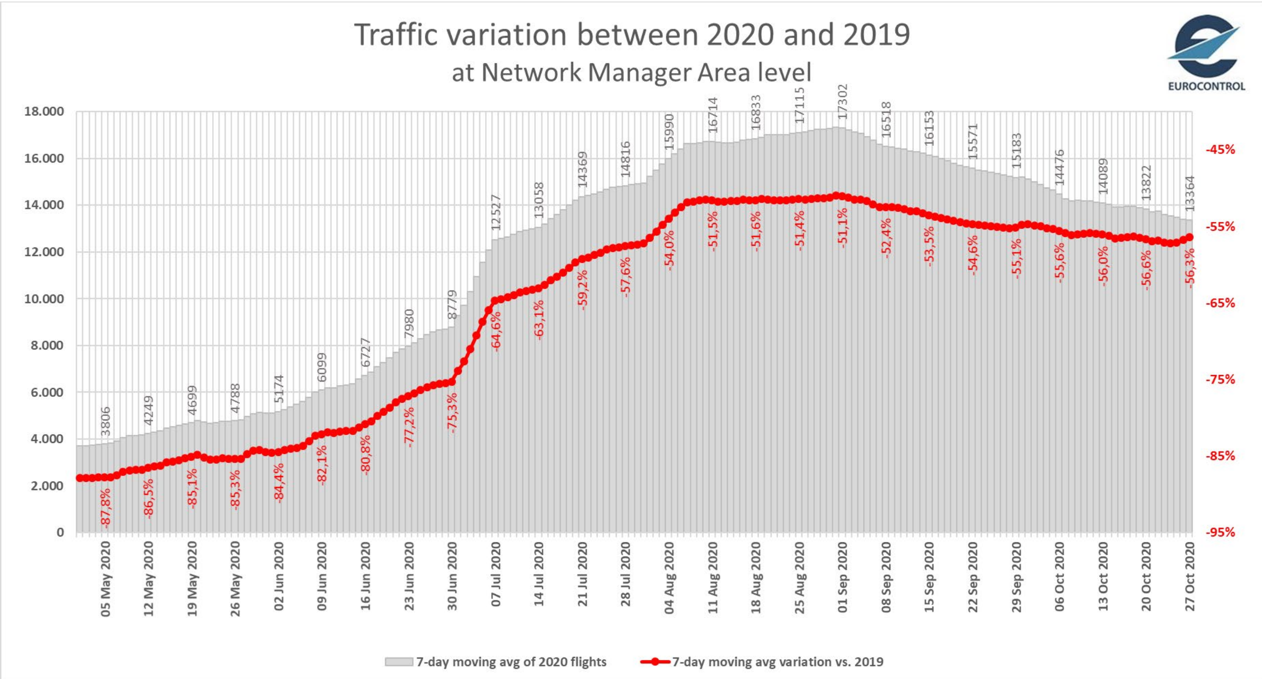
Economic

- **Fuel price:** Fuel price is stable at 104cts/gal on 23 October 2020.

1. Traffic Situation and Airlines Recovery

- 11,917 flights on Tuesday 27 October, (-6% with -818 flights compared to Tuesday 13 October). This is 42% of 2019 traffic levels. Based on a 7-day moving average, the decrease is -56.3% compared to 2019 which is now degrading since early September. The slight increase of the 7-day moving average over the last 3 days is most probably due to the adjustment to winter schedules following the clock change on Sunday 27 October 2019. Compared to 2 weeks ago, Ryanair, removed 302 flights.

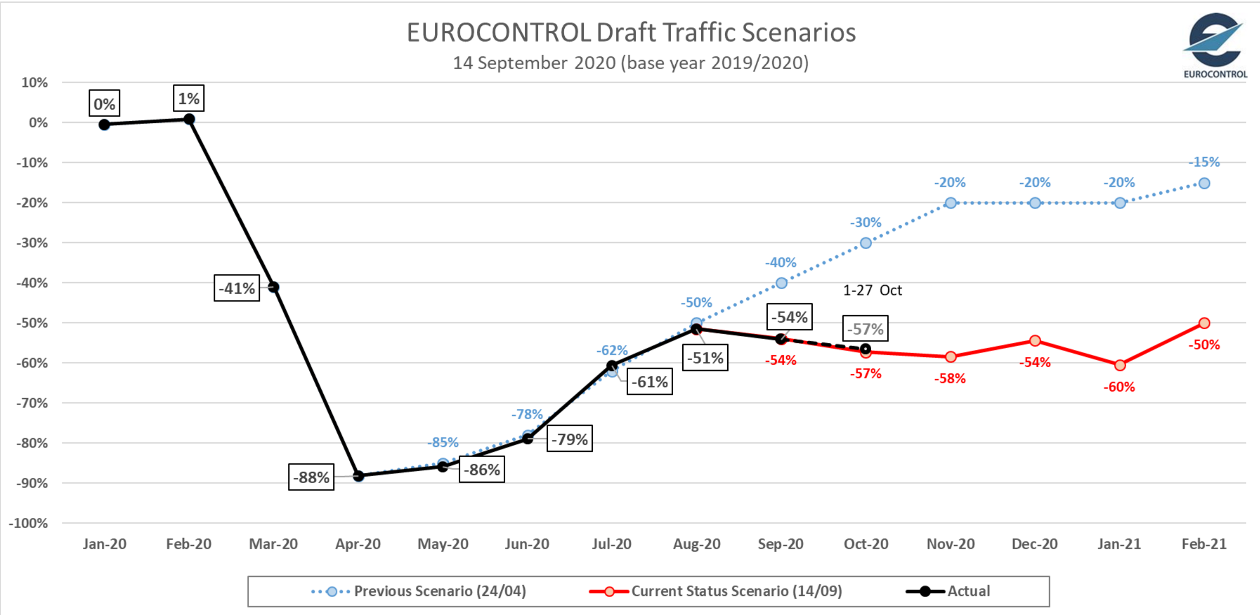




Overall situation against EUROCONTROL traffic scenarios:

- 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. 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.

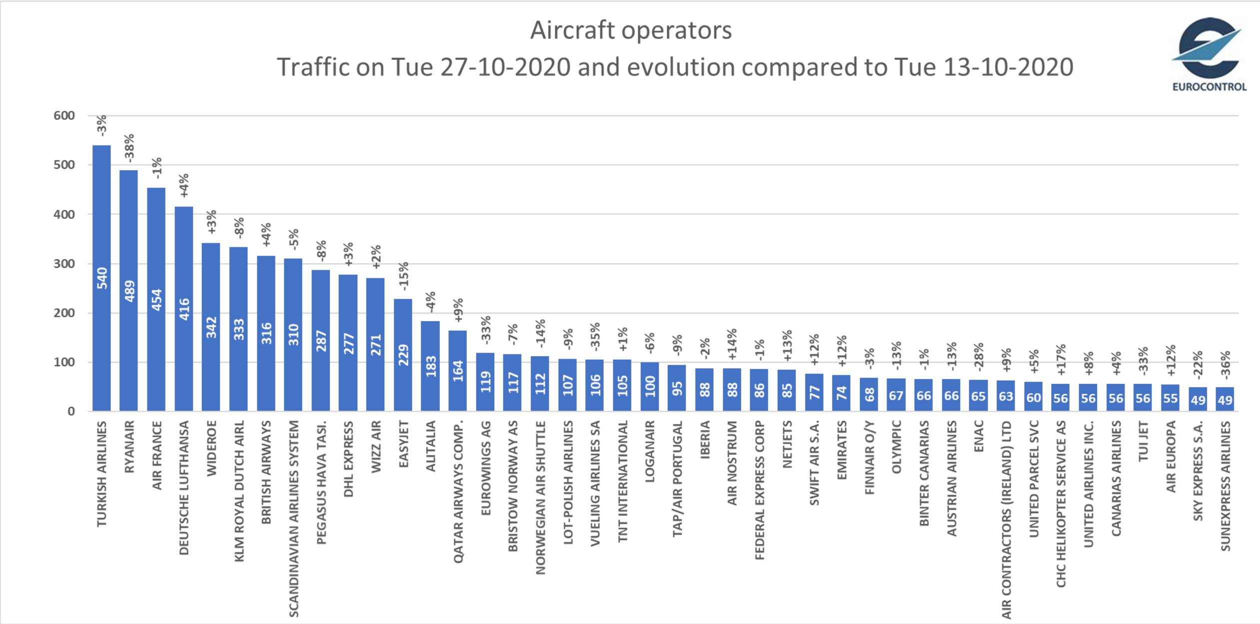
- Over **1-27 October traffic is -57%**, in line with the scenarios for the moment but the situation is going deteriorate as a result of the second wave of the pandemic. A number of large network carriers have indicated to EUROCONTROL their intentions to further reduce capacity during the months of November and December, which will have a material impact on the total number of flights in the network.



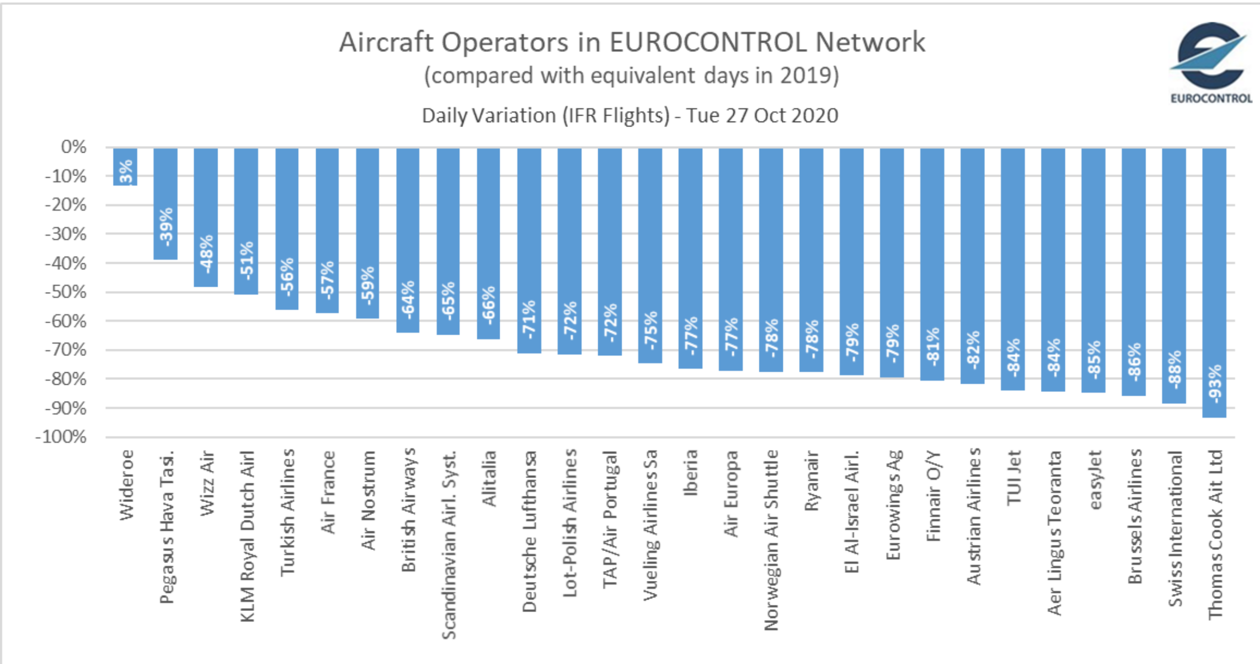
European Airlines:

- Turkish Airlines was the airline with the highest number of flights with 540 flights on Tuesday 27 October showing a decrease of -3% compared to Tuesday 13 October (-18 flights), followed by Ryanair (489 flights, -38%, -302 flights), Air France (454 flights, -1%, -6 flights), Lufthansa (416 flights, +4%, +15 flights), Wideroe (342 flights, +3%, +9 flights), KLM (333 flights, -8%, -27 flights), British Airways (316 flights, +4%, +13 flights) and SAS (310 flights, -5%, -18 flights).

- Compared to two weeks ago, most big airlines decreased their capacity: Ryanair (-302 fligths), Eurowings (-58), Vueling (-57), easyJet (-39), KLM (-27), TUI Jet (-27), SunExpress airlines (-27). Only a few like Lufthansa increased their capacity (+15 flights) followed by Qatar Airways (+13) and British Airways (+13).



- Compared to 2019, Widerøe operated at -13% on Tuesday 27 October followed by Pegasus (-39%), Wizz Air (-48%), KLM (-51%), Turkish Airlines (-56%), Air France (-57%), British Airways (-64%), Ryanair (-78%), Lufthansa (-76%) and easyJet (-85%).

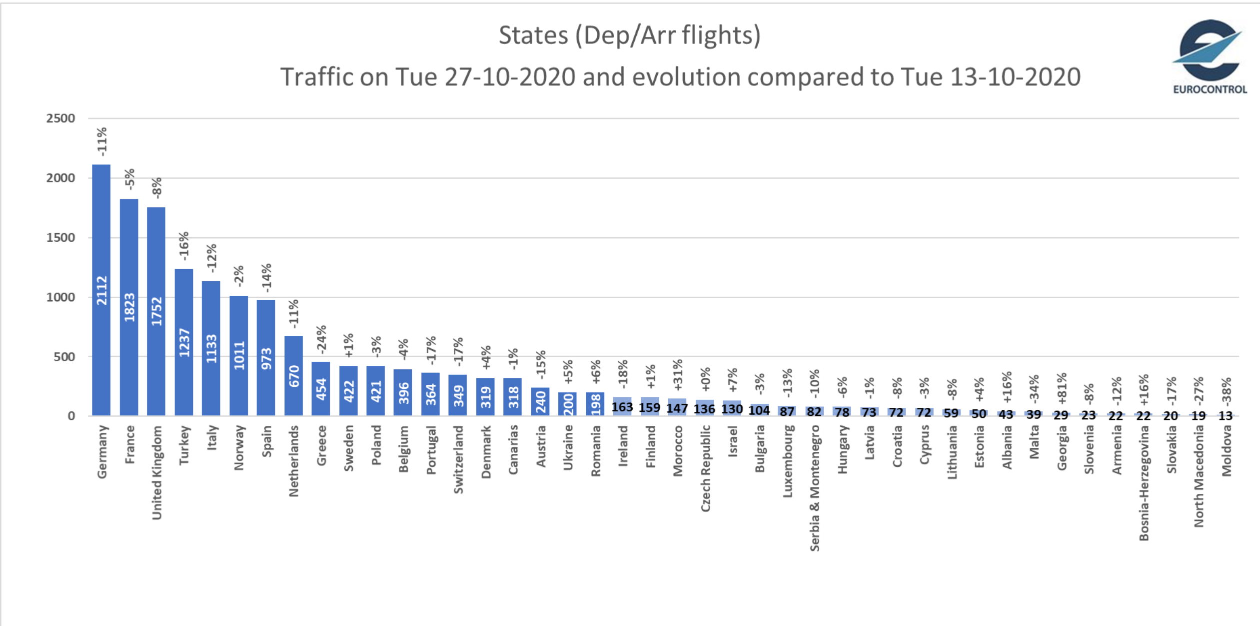


News from key European airlines:

- **British Airways** resuming service from Heathrow to Bridgetown, Barbados.
- **easyJet** increasing service to the Canary Islands.
- **El Al** resuming services to Miami and Kiev and extended unpaid leave for 5,500 employees until the end of November.
- **Eurowings** resuming flights between Germany and the Canary Islands.
- **KLM** is reported to have commences its second voluntary departure scheme (up to 1500 positions).
- **Lufthansa** and **Air India** resuming India-Germany services under travel bubble arrangement.
- **Lufthansa Group** reports a loss (EBIT) of €1.3 billion for Q3 2020; plans to operate about 25% of normal capacity in Q4.
- **Ryanair** increasing frequency of domestic flights from Bari; resuming services to Morocco; resuming flights between the UK and the Canary Islands.
- **Turkish Airlines** to increase frequency to St Petersburg from once to twice daily; takes delivery of first A350 and deploys A350 on domestic routes.
- **Wizz Air** launching seven more domestic services in Italy in December and seven more domestic services in Norway (launching second base at Trondheim); declares an interest in taking over 20 unused slots at London Gatwick; expanding Cluj base.

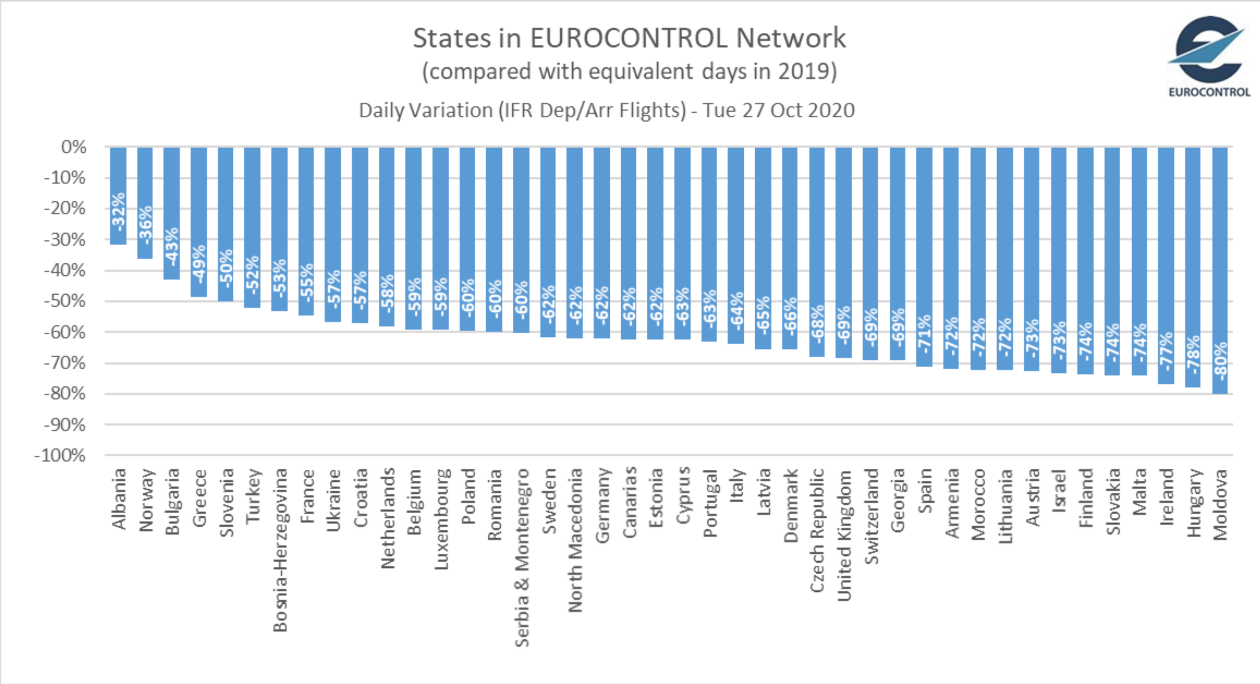
States

- Based on traffic levels, the Top 6 busiest States[1] is stable. Germany had 2112 flights on Tuesday 27 October (-11% over 2 weeks) followed by France (1823, -5%), the UK (1752, -8%), Turkey (1237, -16%), Italy (1133, -12%), Norway (1011, -2%), Spain (973, -14%), Netherlands (670, -11%), Greece (454, -24%), Sweden (422, +1%) and Poland (421, -3%).



- Compared to 2019, Departure/Arrival traffic in Spain was -71% on Tuesday 27 October, the UK (-69%), Italy (-64%), Germany (-62%), France (-55%), Turkey (-52%) and Norway (-36%).

[1] excluding overflights.

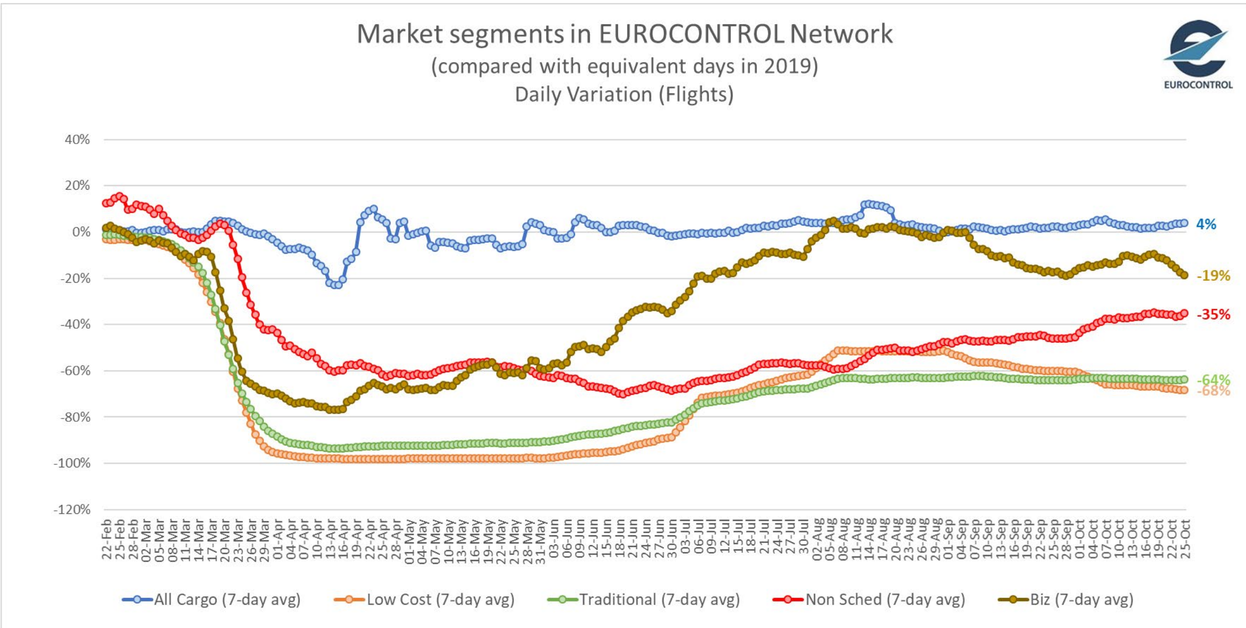


News from States:

- **Singapore** and **Germany** agreed to establish Reciprocal Green Lane for Business and Official travel in a joint statement on Friday (Oct 23).

Market Segments:

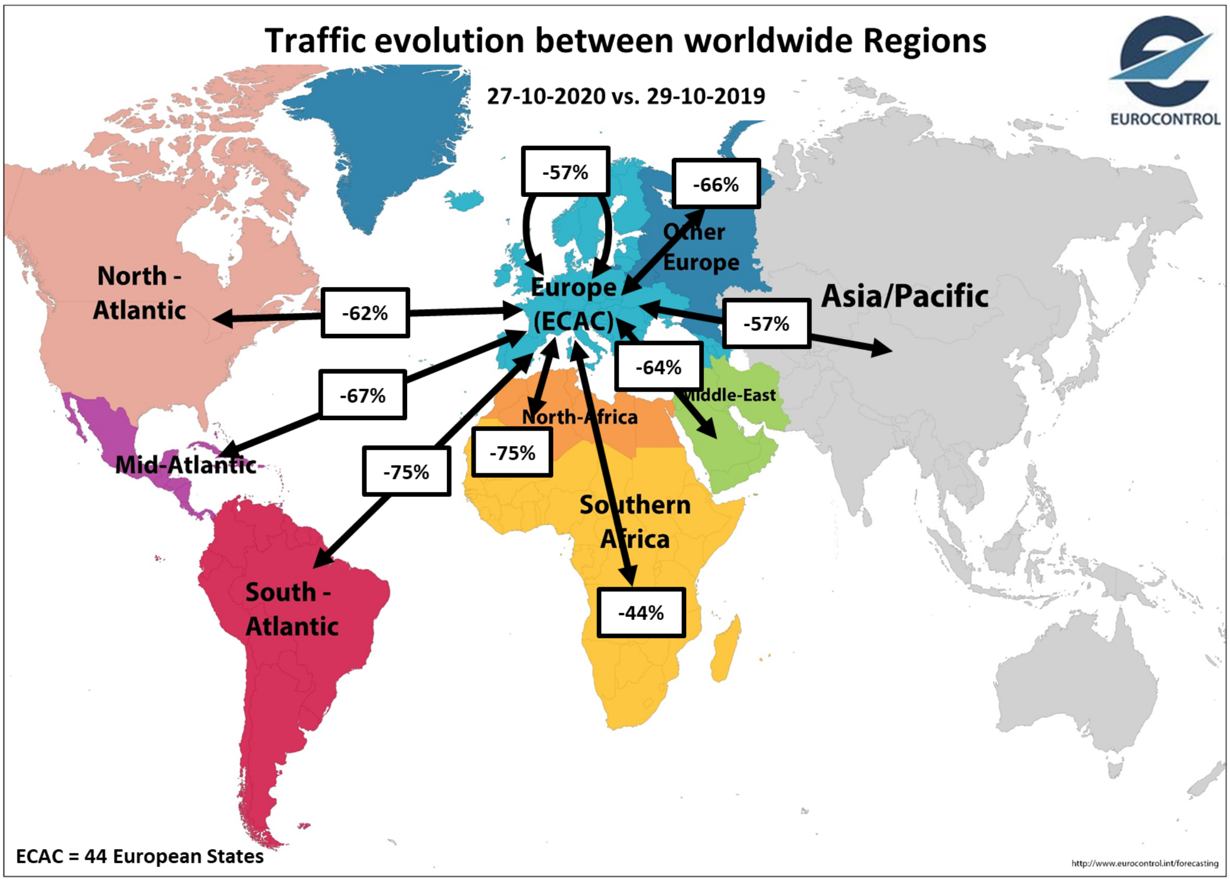
- After having gaining pace since early October, Business Aviation decreased since mid-October (reaching -19% vs. 2019) while all-cargo remains stable at 2019 levels (+4%).
- Low-cost flights recorded a faster recovery during the summer but decreased early September and even more in October with -68% vs 2019. Charter flights increased since October reaching -35%.

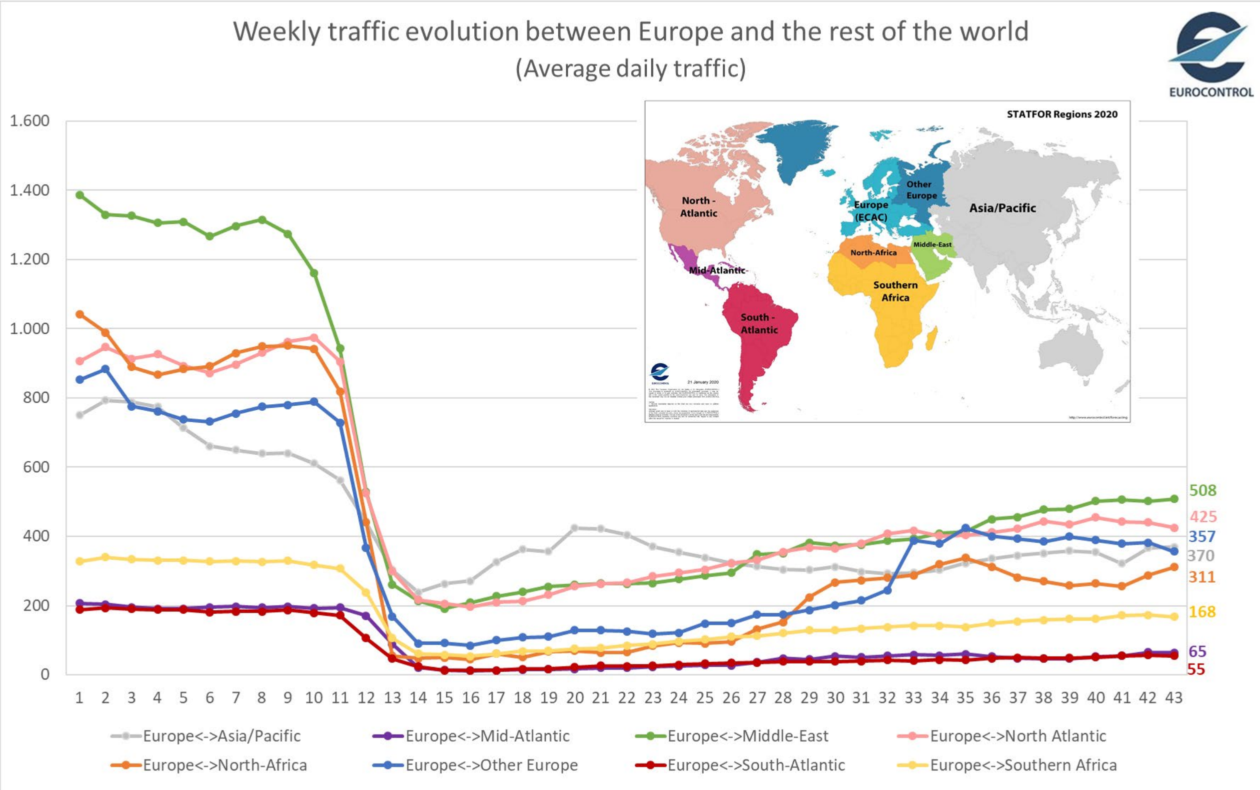


2. Traffic Flows & Country Pairs

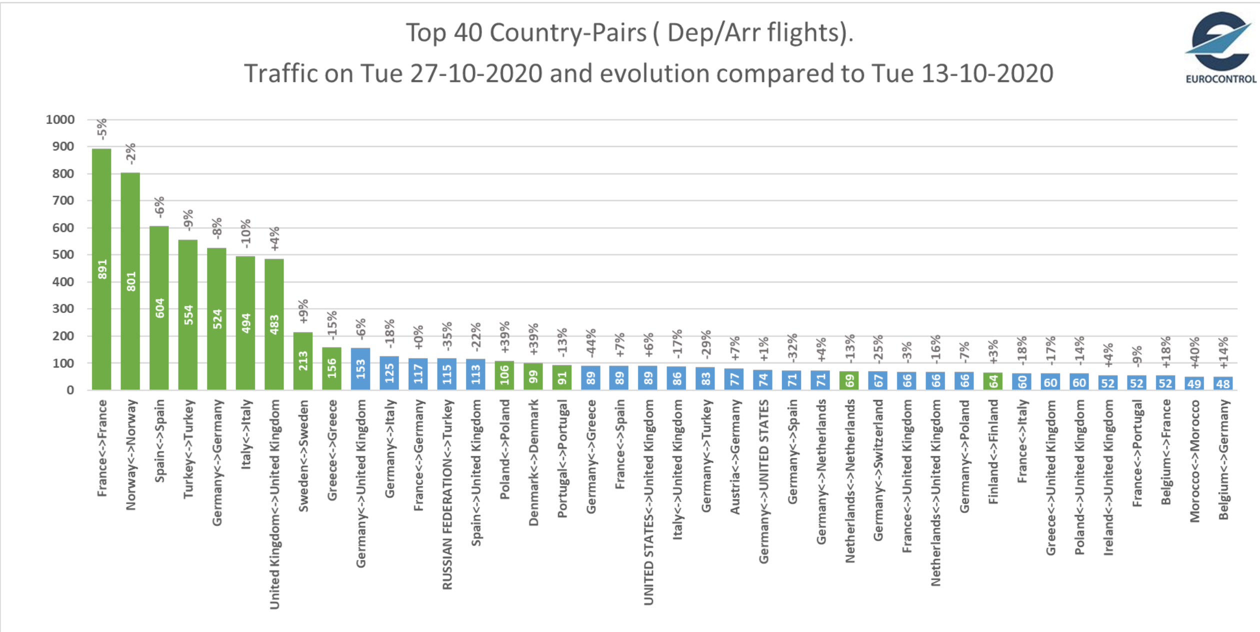
- The main traffic flow is the intra-Europe flow with 9,558 flights on Tuesday 27 October, which is decreasing (-9%) over 2 weeks.
- The top traffic flows with Europe were with "Middle-East" (486 flights, +4%) followed by "North-Atlantic" (384 flights, -1%), "Asia/Pacific" (324 flights, +11%), "Other Europe" (294 flights, -12%), and "North-Africa" (230 flights, +11%).
- Intra-Europe flights are at -57% compared to 2019 while all other flows are at -64%.

REGION	13-10-2020	27-10-2020	%	vs. 2019
Intra-Europe	**10.471**	**9.558**	***-9%***	***-57%***
Europe<->Asia/Pacific	293	324	*+11%*	*-57%*
Europe<->Mid-Atlantic	48	50	*+4%*	*-67%*
Europe<->Middle-East	466	486	*+4%*	*-64%*
Europe<->North Atlantic	386	384	*-1%*	*-62%*
Europe<->North-Africa	207	230	*+11%*	*-75%*
Europe<->Other Europe	333	294	*-12%*	*-66%*
Europe<->South-Atlantic	46	46	*+0%*	*-75%*
Europe<->Southern Africa	172	181	*+5%*	*-44%*
Non Intra-Europe	**1.951**	**1.995**	***+2%***	***-64%***

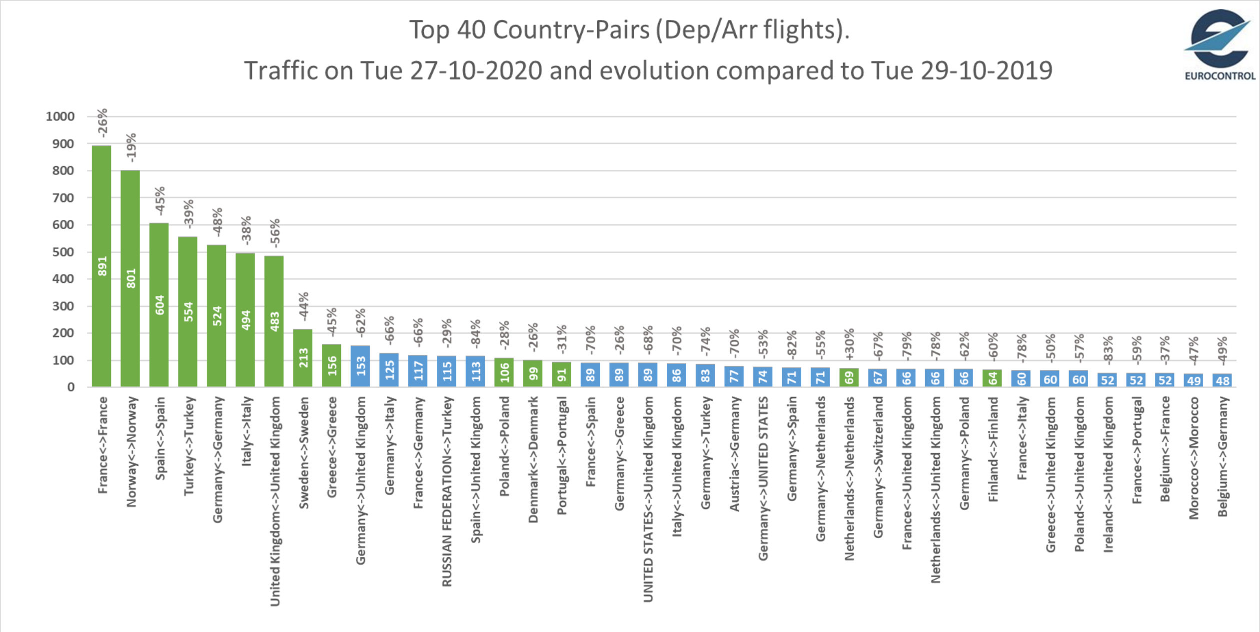




- Domestic flows are the most active flows (i.e. 9 of the top 10 flows are domestic). From the top domestic flows, Sweden (+9%) and UK (+4%) showed an increase over 2 weeks. All other domestic flows decreased like in Greece (-15%), Italy (-10%), Turkey (-9%), Germany (-8%), Spain (-6%), France (-5%) and Norway (-2%).
- The busiest non domestic flows were Germany-UK (153, -6%), Germany-Italy (125 flights, -18%), France-Germany (117 flights +0%), Turkey-Russia (115 flights, -35%) and Spain-UK (113 flights, -22%).

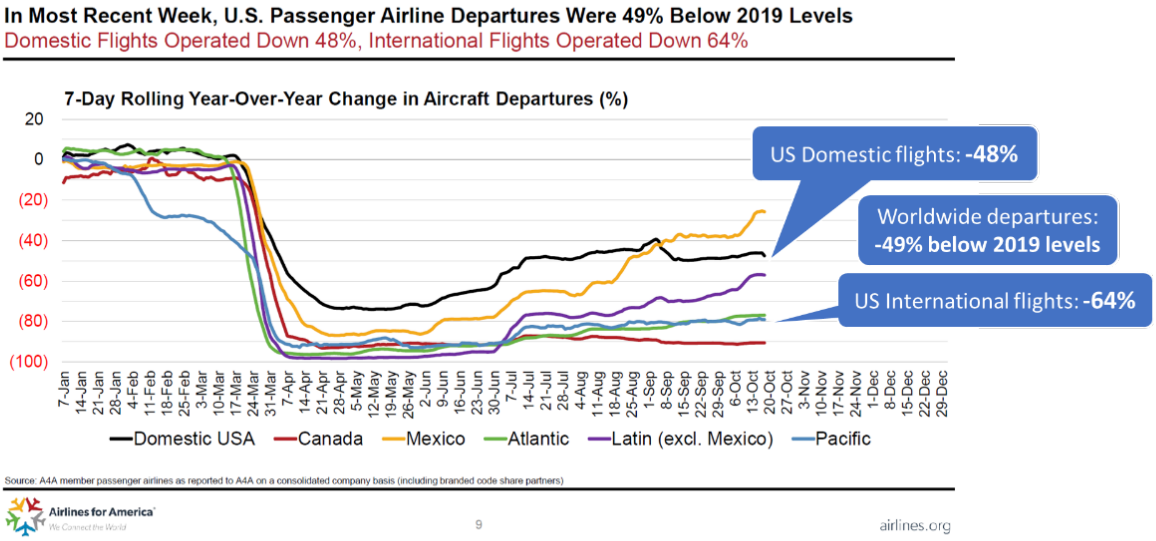


- Compared to 2019, domestic flows within the UK were -56% on Tuesday 27 October 2020, followed by Germany (-48%), Spain (-45%), Greece (-45%), Sweden (-44%), Turkey (-39%), France (-26%) and Norway (-19%).

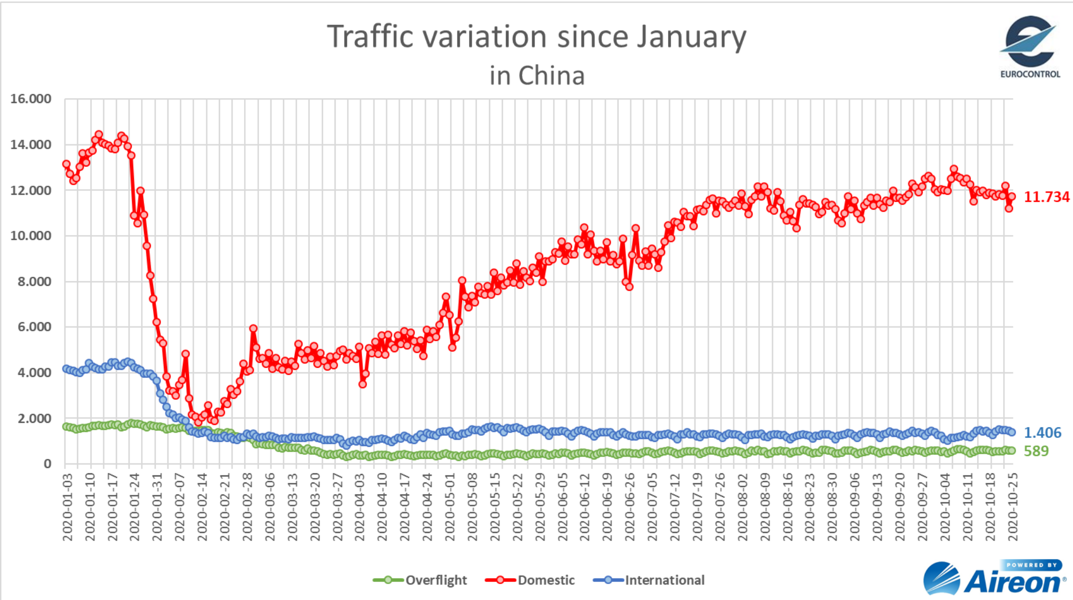


3. Situation outside Europe

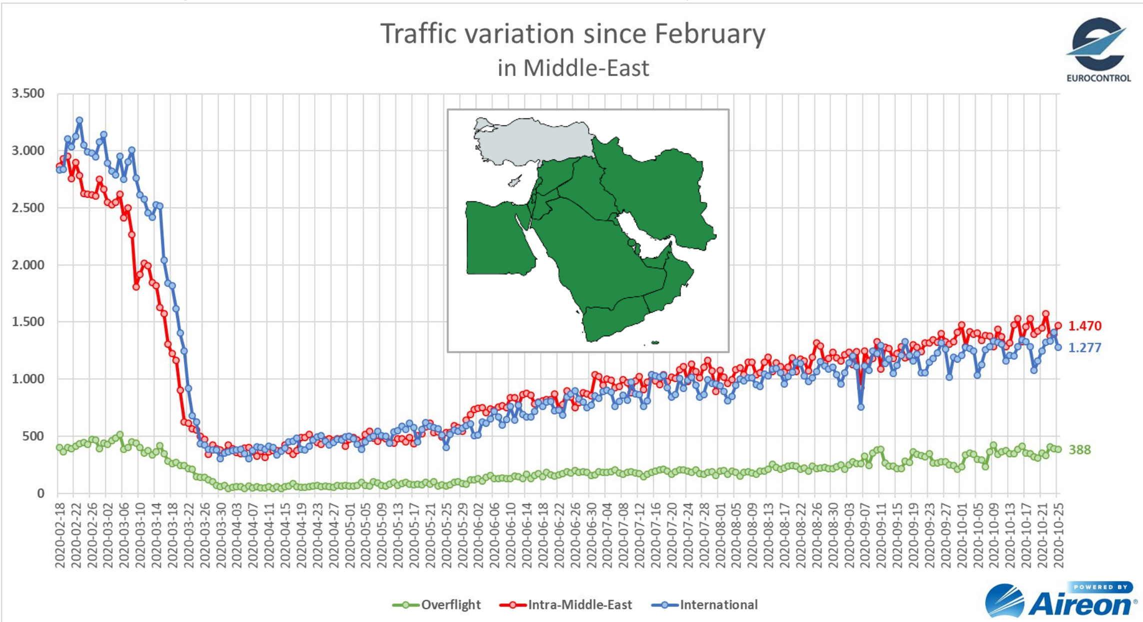
- **United-States (A4A members):**
  - US domestic traffic started to decrease again since 13 October reaching -48% of 2019 on 20 October. All flows like with Latin America and Mexico which showed a steady increase since early October have now stopped.
  - In week ending Oct 20, U.S. airlines passenger volumes remained 65% below year-ago levels with Domestic Air Travel down 63% and International down 78%.
  - The domestic U.S. Load Factor averaged 61% in most recent week, versus 88% a year earlier.



- **China:**
  - Chinese domestic flights are now stable with 11,734 flights (-11% compared to January 2020). International flights have been stable since March with 1,406 flights (-67% compared to January 2020). The same is true for overflights with 589 flights (-65% compared to January 2020).



- **Middle East:**
  - Since the beginning of April, Intra-Middle-East traffic has been increasing slowly reaching 1,470 flights on 25 October (-47% compared to February 2020). International traffic has been recovering at the same levels as domestic from early April with 1,277 flights (-58% compared to February 2020). Overflights have started to increase since the second week of September with 388 flights and have almost reached the February level (-9%).

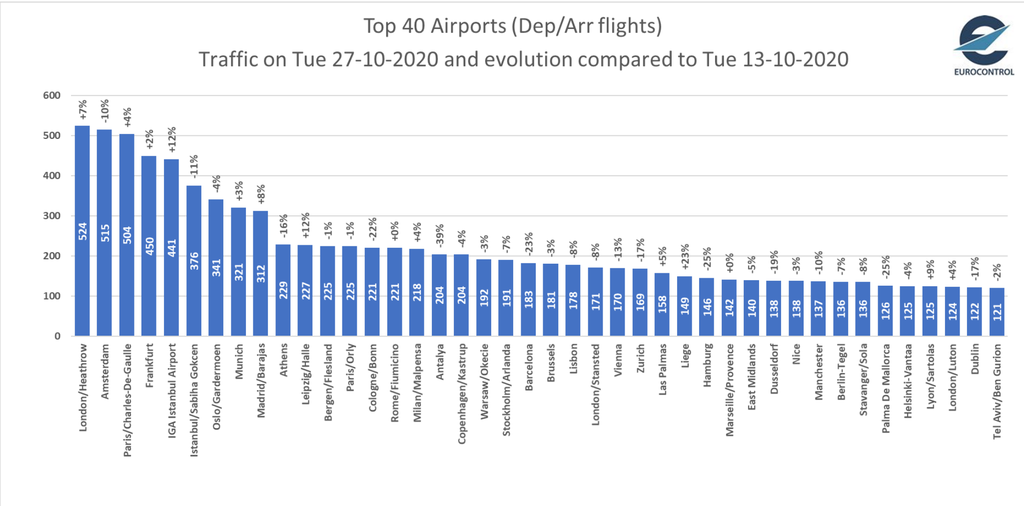


News for worldwide airlines and ANSPs:

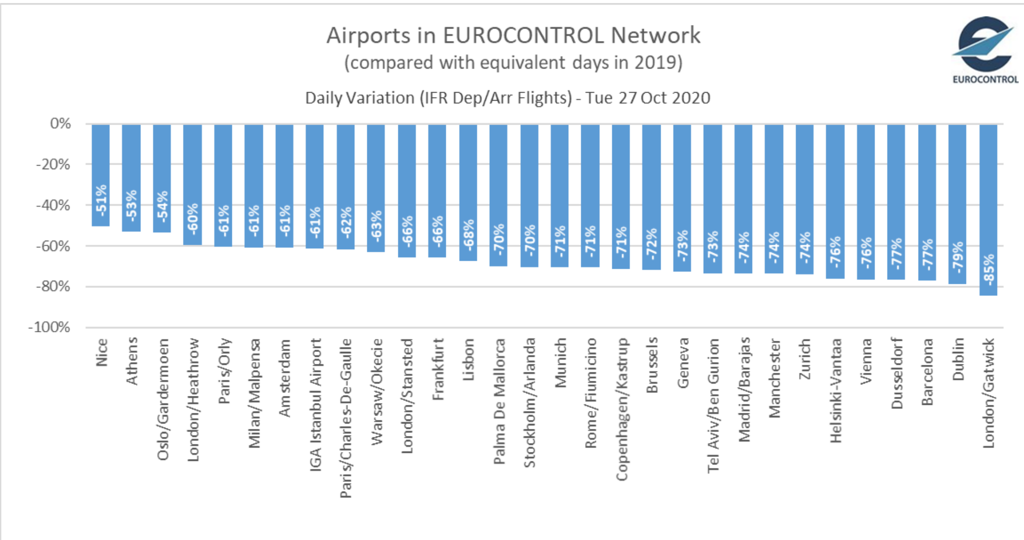
- **Aeroflot** raises €886 million through a share offering.
- **Cathay Pacific Group** delaying Boeing 777-9 delivery beyond 2025.
- **Singapore Airlines** to restart Singapore to New York service with A350 to accommodate a mix of passenger and cargo traffic

4. Airport Information

- London/Heathrow was the busiest airport with 524 Dep/Arr flights on 27 October (+7% over the last 2 weeks) followed by Amsterdam (515, -10%), Paris CDG (504, +4%), Frankfurt (450, +2%), İGA Istanbul Airport (441, +12%), Istanbul/Sabiha (376, -11%), Oslo (341, -4%), Munich (321, +3%) and Madrid (312, +8%).
- From the top 10 airports, İGA Istanbul Airport showed the largest increase (+12%) over 2 weeks, followed by Madrid (+8%), London/Heathrow (+7%), Paris/CDG (+4%), Munich (+3%) and Frankfurt (+2%). All other airports reported a decrease like Athens (-16%), Istanbul/Sabiha (-11%), Amsterdam (-10%) and Oslo (-4%).



- Compared to 2019, Athens operated at -53% on 27 October, London Heathrow (-60%), Amsterdam (-61%), İGA Istanbul Airport (-61%), Paris CDG (-62%), Frankfurt (-66%), Roma (-71%) and Madrid (-74%).

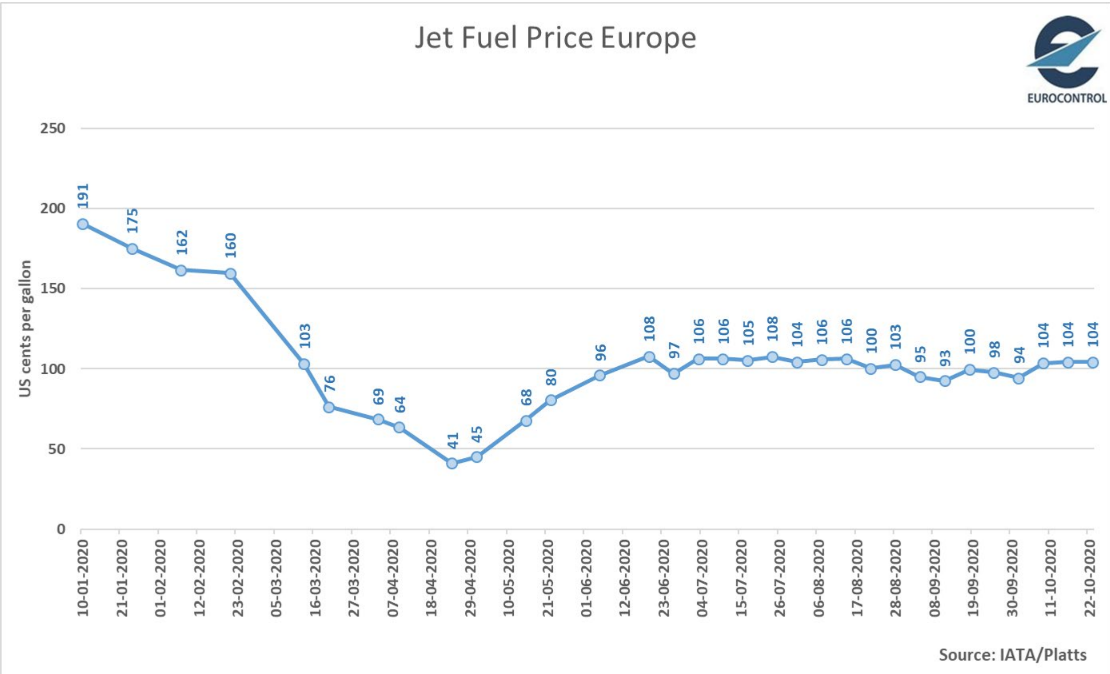


News from European and worldwide airports:

- **ACI EUROPE** warned on 27 Oct that some 193 airports would face insolvency in the coming months if passenger traffic does not start to recover by the year end. These airports facilitate 277,000 jobs and €12.4 billion of European GDP.
- **Groupe ADP** reports revenue down 52.7% for the nine months to end September.
- **Helsinki Airport** closing a main runway (04R/22L) for the winter.
- **Leipzig/Halle** reported September cargo traffic growth of 18.6% year-on-year.
- **London Gatwick** reports that its workforce will be 40% lower by the end of October, with operations are 10-15% of capacity during the winter.
- **London Heathrow** starts pre-departure test facility, initially serving flights to Hong Kong.
- **Tokyo Narita Airport** opening a coronavirus testing centre – 2 hour result, cost around $400; also reducing landing and parking charges. Trialling a driverless cargo tractor; introducing Sustainable Aviation Fuel for ANA services.
- **ACI EUROPE** warned on 27 October of such fundamental risks to business continuity that an estimated 193 airports face insolvency in the coming months if passenger traffic does not start to recover by the year end. These airports between them facilitate 277 thousand jobs and €12.4 billion of European GDP.

5. Economic, other factors

- **Fuel Price:** After having remained stable slightly above 100 cts/gal since early July, fuel price is stable at 104cts/gal on 23 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 (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.