COVID19 Impact on European Air Traffic
EUROCONTROL Comprehensive Assessment

EUROCONTROL

Thursday, 19 November 2020

Traffic Situation & Airlines Recovery

- **10,233 flights on Wednesday 18 November, (-12% with 1,449 fewer flights over 2 weeks) reaching 38% of 2019 levels.**
- The 7-day moving average is -62% compared to 2019.
- **November traffic is so far -60% over the first 18 days**, slightly below the scenarios. However, the situation is deteriorating as a result of the second wave of the pandemic resulting in a significant decrease of large network carriers capacity (see in particular Ryanair and BA). The final figure for November should therefore be lower.
- **Turkish Airlines was the airline with the highest number of flights** with 578 flights on Wednesday 18 November showing a decrease of -2% compared to Wednesday 4 November (-13 flights), followed by Widerøe (314, -5%, -16), **DHL Express** (289, +1%, +3), SAS (288, -15%, -50), Pegasus (277, -13%), KLM (274, -25%, -92), Lufthansa (235, -35%, -125), Air France (232, -24%, -72), Ryanair (202, -60%, -308), **Qatar Airways** (174, +1%, +2), Iberia (124, +9%, +10), **TNT international** (116, +6%, +7). Yesterday, **Ryanair was ranked 8th**, **British Airways 16th (with 94 flights, down 68%) and easyJet 82nd (with 22 flights, down 98%)**.
- Over 2 weeks, **most large airlines decreased their capacity**: **Ryanair** (-308 flights, -60%), **British Airways** (-203 flights, -68%), Lufthansa (-125 flights, -35%), KLM (-92 flights, -25%), Alitalia (-83 flights, -45%), Air France (-72 flights, -24%) and Norwegian (-70 flights, -58%).
- Yesterday, Widerøe was at -22% compared to 2019 followed by Pegasus (-33%), Turkish Airlines (-53%), KLM (-59%), Air France (-79%), Lufthansa (-84%), **Ryanair (-87%)**, **BA (-89%)**, **Wizz Air (-96%), Norwegian (-90%)** and **easyJet (-98%)**. In terms of dep/arr traffic, **the ranking of the Top 8 busiest States has changed** compared to last week with **UK (from 2nd to 4th), France (from 4th to 2nd)** and **Spain (from 7th to 5th)**. Germany remained the State with the highest number of dep/arr flights with 1853 flights (-7% over 2 weeks) followed by France (1410, -10%), Turkey (1173, -10%), the UK (1092, -40%), Spain (1089, -4%), Norway (838, -16%) and Italy (748, -31%).
- **Business Aviation has decreased over the last week** reaching -27% vs. 2019. **All-cargo remains globally stable** at 2019 levels (+7%) while **Charter flights are steadily increasing** reaching -20%.

Traffic Flows & Country Pairs

- **The intra-Europe flow is the main flow** with 7,729 flights on 18 Nov (-15% over 2 weeks). Top traffic flows with Europe were with **"Middle-East"** (503 flights, -6%) followed by **"North Atlantic"** (434 flights, +8%).
- Intra-Europe flights are at -63% compared to 2019 while all other flows are at -60%.
- From the top domestic flows, **Germany (+13%)**, Spain (+5%), Turkey (+1%) and Greece (+1%) showed an increase over 2 weeks. **All other domestic flows decreased** like in **the UK (-35%)**, **Italy (-34%)**, **Sweden (-20%)**, France (-13%) and Norway (-10%). The **busiest non domestic flows** were **France-Germany** (109 flights, +2%), **US-UK** (99 flights, +15%), **UK-Germany** (93 flights, -36%) and **Germany-Spain** (91 flights, -5%).
- Compared to 2019, domestic flows within the UK were -70% on Wednesday 18 November 2020, followed by Sweden (-60%), Italy (-59%), Spain (-52%), France (-51%), Germany (-49%), Turkey (-35%) and Norway (-28%).

Airports & Passengers

- ACI reported **1.2 million passengers on Sun 8 Nov 2020, compared to 6 million on Sun 10 Nov 2019 (i.e. -80%)**. Overall, since January 2020, Europe experienced a **loss of 1.5 billion passengers compared to 2019** (-79%).
- **İGA Istanbul Airport was the busiest airport** with 491 Dep/Arr flights on 18 November (-4% over the last 2 weeks) followed by Amsterdam (467, -16%), Paris CDG (397, -14%), Frankfurt (392, -12%), Istanbul/Sabiha (377, -9%), Madrid (357, +1%), London/Heathrow (303, -41%) and Oslo (277, -18%).
- From the top 10 airports, Leipzig (+9%) and Madrid (+1%) showed an increase over 2 weeks. **All other airports reported a decrease like London/Heathrow (-41%)**, Oslo (-18%), Amsterdam (-16%), Paris CDG (-14%), Frankfurt (-12%), Istanbul/Sabiha (-9%) and İGA Istanbul Airport (-4%).
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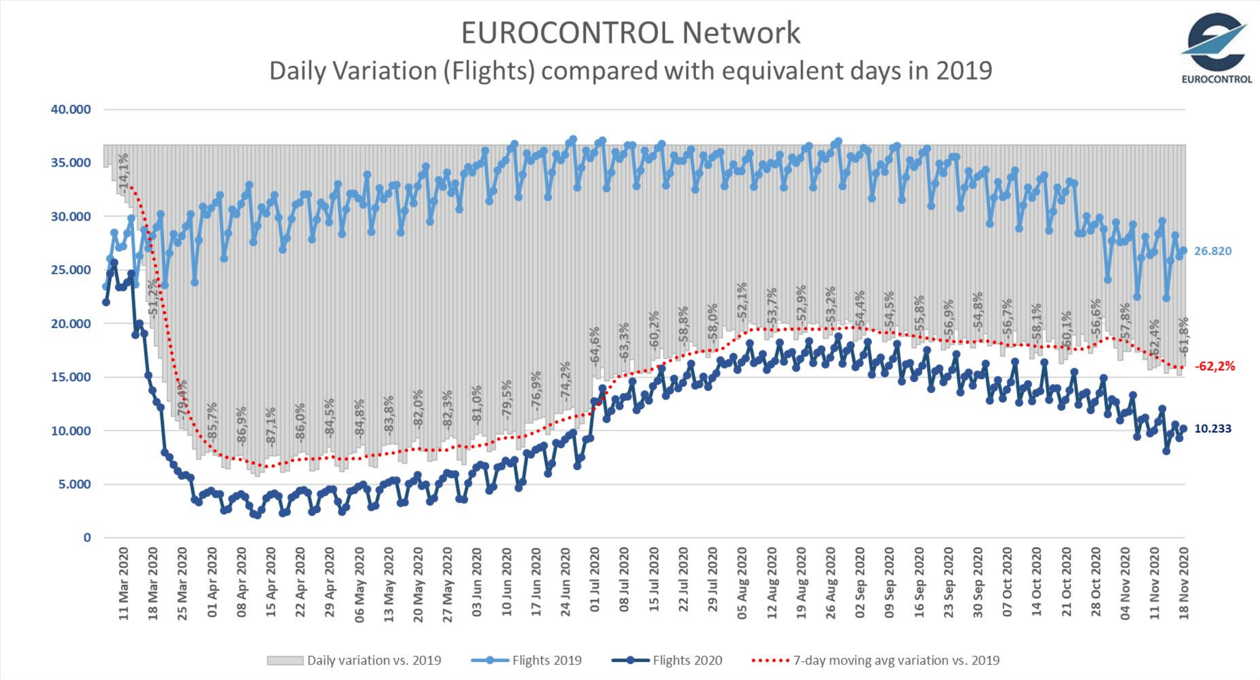
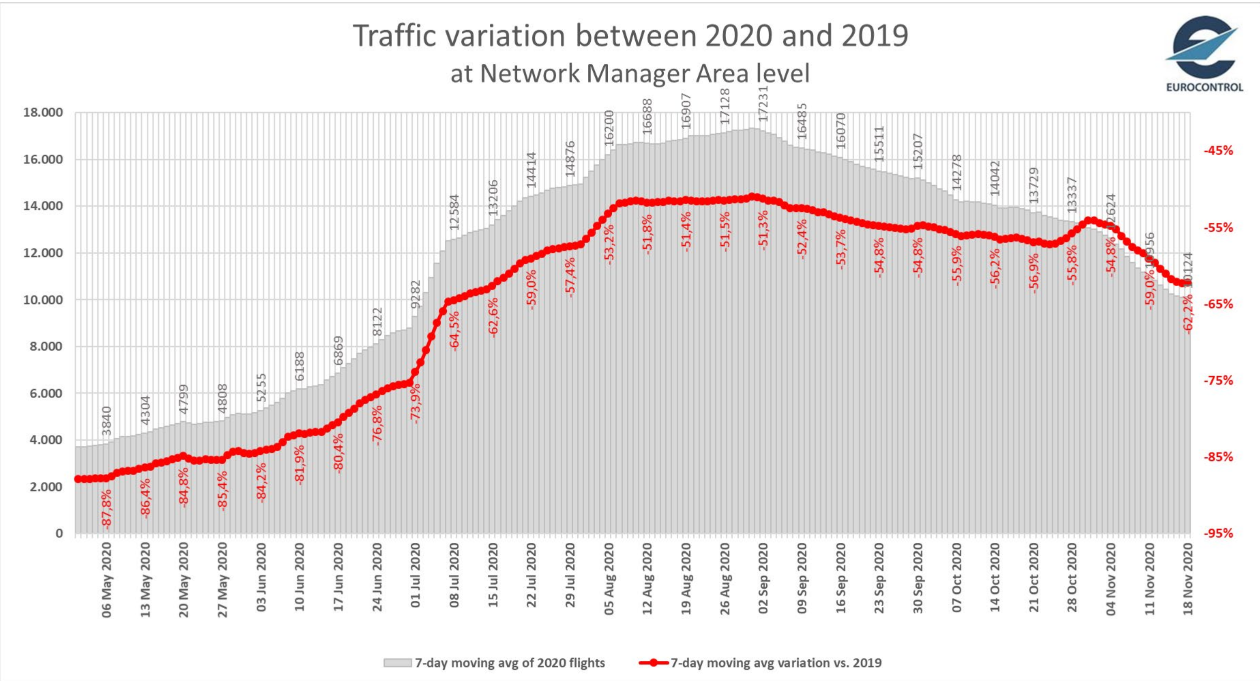
Economic

- **En-route air navigation charges:** The amount billed for en-route charges was **260M€ for October flights** (-62% compared to plan). From January till October, amounts billed are -58% compared to plan.

1. Traffic Situation and Airlines Recovery

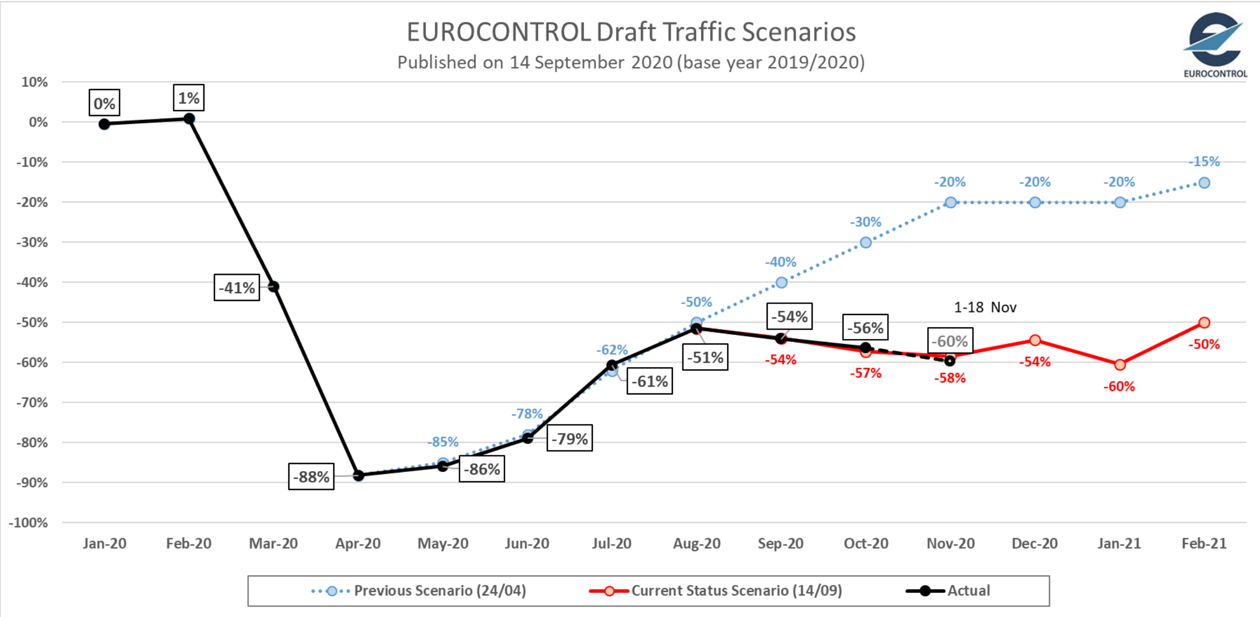
- 10,233 flights on Wednesday 18 November (-12% with -1.449 flights compared to Wednesday 4 November). This is 38% of 2019 traffic levels. Based on a 7-day moving average, the decrease is -62% compared to 2019 which has stabilized over the las week but is likely to decrease again when considering the capacity reduction of main airlines (see in particular Ryanair in the airline section).





Overall situation against EUROCONTROL traffic scenarios:

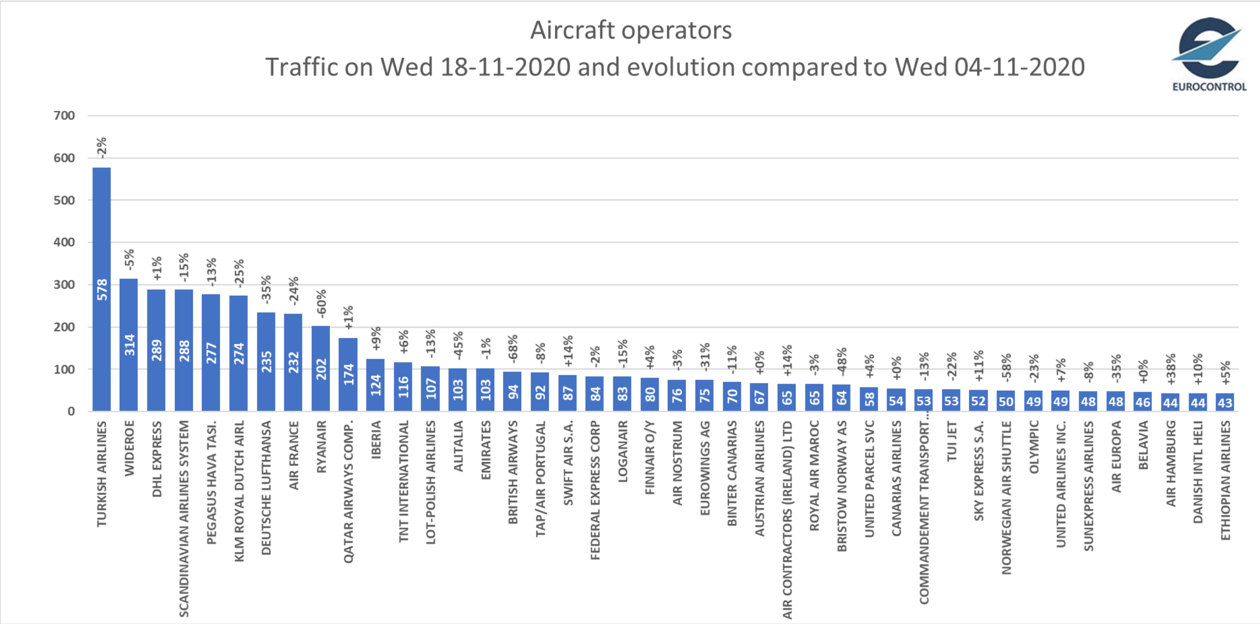
- **November traffic is so far -60% over the first 18 days**, slightly below the scenarios. However, the situation is deteriorating as a result of the second wave of the pandemic as a number of large network carriers have started to decrease significantly their capacity (see the Airlines section below). The final figure for November should therefore be lower.



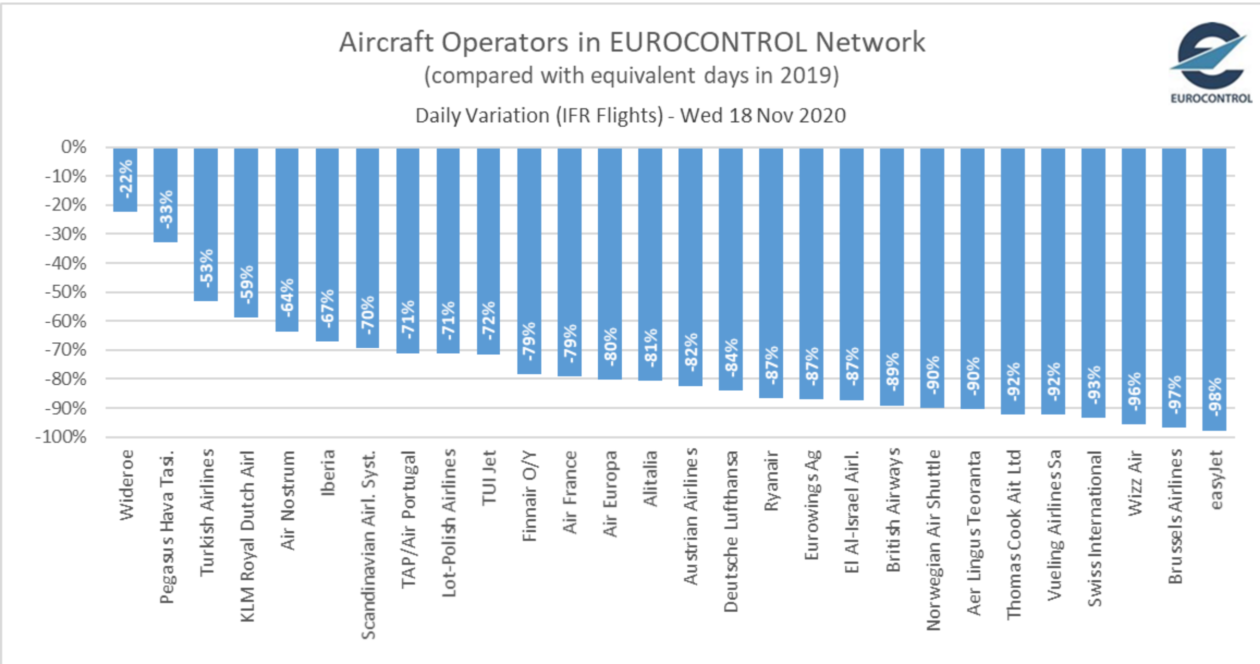
European Airlines:

- Turkish Airlines was the airline with the highest number of flights with 578 flights on Wednesday 18 November showing a decrease of -2% compared to Wednesday 4 November (-13 flights), followed by Widerøe (314 flights, -5%, -16 flights), DHL Express (289 flights, +1%, +3 flights), SAS (288 flights, -15%, -50 flights), Pegasus (277 flights, -13%, -42 flights), KLM (274 flights, -25%, -92 flights), Lufthansa (235 flights, -35%, -125 flights), Air France (232 flights, -24%, -72 flights), **Ryanair (202 flights, -60%, -308 flights)**, Qatar Airways (174 flights, +1%, +2 flights), Iberia (124 flights, +9%, +10 flights), TNT international (116 flights, +6%, +7 flights). **Yesterday, Ryanair was ranked 8th, British Airways 16th (with 94 flights, down 68%) and easyJet 82nd (with 22 flights, down 98%).**

- Compared to two weeks ago, most large airlines decreased their capacity: Ryanair (-308 flights, -60%), British Airways (-203 flights, -68%), Lufthansa (-125 flights, -35%), KLM (-92 flights, -25%), Alitalia (-83 flights, -45%), Air France (-72 flights, -24%) and **Norwegian (-70 flights, -58%).**



- Compared to 2019, Widerøe operated at -22% on Wednesday 18 November followed by Pegasus (-33%), Turkish Airlines (-53%), KLM (-59%), Air France (-79%), Lufthansa (-84%), Ryanair (-87%), British Airways (-89%), Wizz Air (-96%), Norwegian (-90%) and easyJet (-98%).



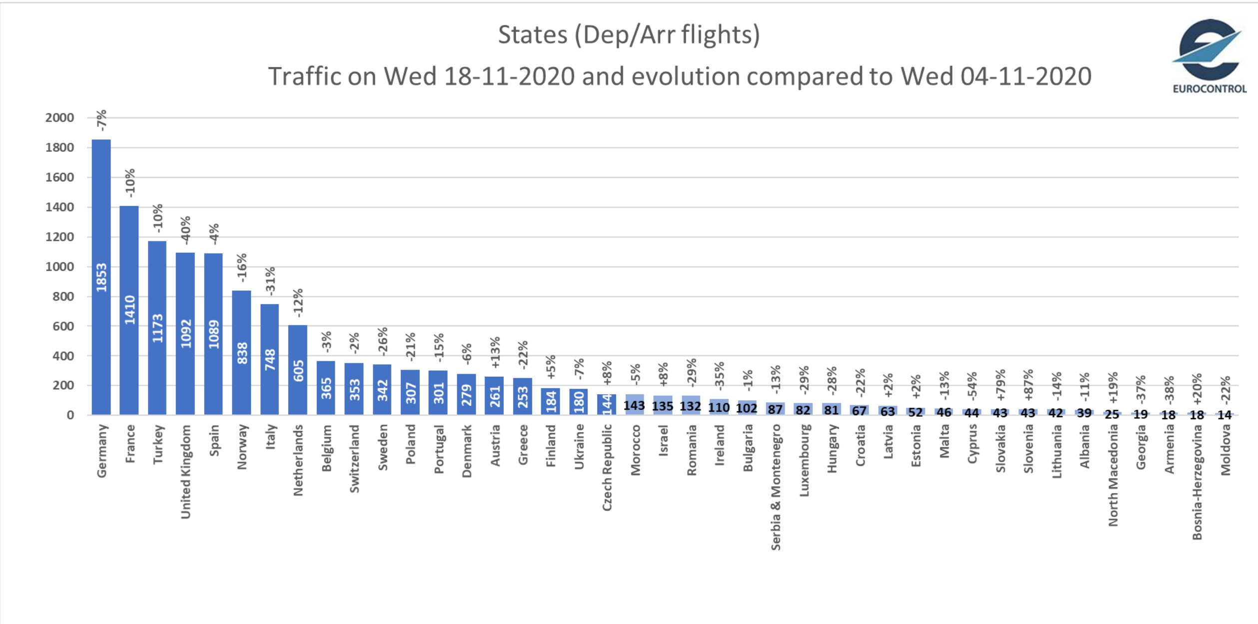
News from key European airlines:

- With regard to **Norwegian**, shares have been suspended on the Norwegian stock exchange and the Irish operation has filed for protection under Irish law.
- **Air France-KLM** ships first vaccine.
- **Alitalia** to resume services to Sao Paulo and Buenos Aires in December.

- **Austrian Airlines** suspending services to Bangkok, Bologna, Chicago, Yerevan, Klagenfurt, Kosice, Nice & Podgorica, leaving just 40 destinations; plans to close aviation maintenance department at Graz.
- **easyJet** reports net loss of £1079 million for year to September (previous year – net profit of £349 million).
- **Lufthansa** delays resumption of services from Munich to Chalotte, Denver & Miami from December to March.
- **Lufthansa Group** reaches agreement with ver.di union to cut ground personnel costs.
- **Pegasus Airlines** reports a net profit of €27 million in Q3 2020, benefitting from a reversal of ineffective fuel hedge charges and FX gains; increasing fleet from 92 to 97 in 2021.
- **Turkish Airlines** passenger numbers down 64% in October, with a load factor of 66%.
- **Wizz Air** plans two new domestic services in Norway from mid December.

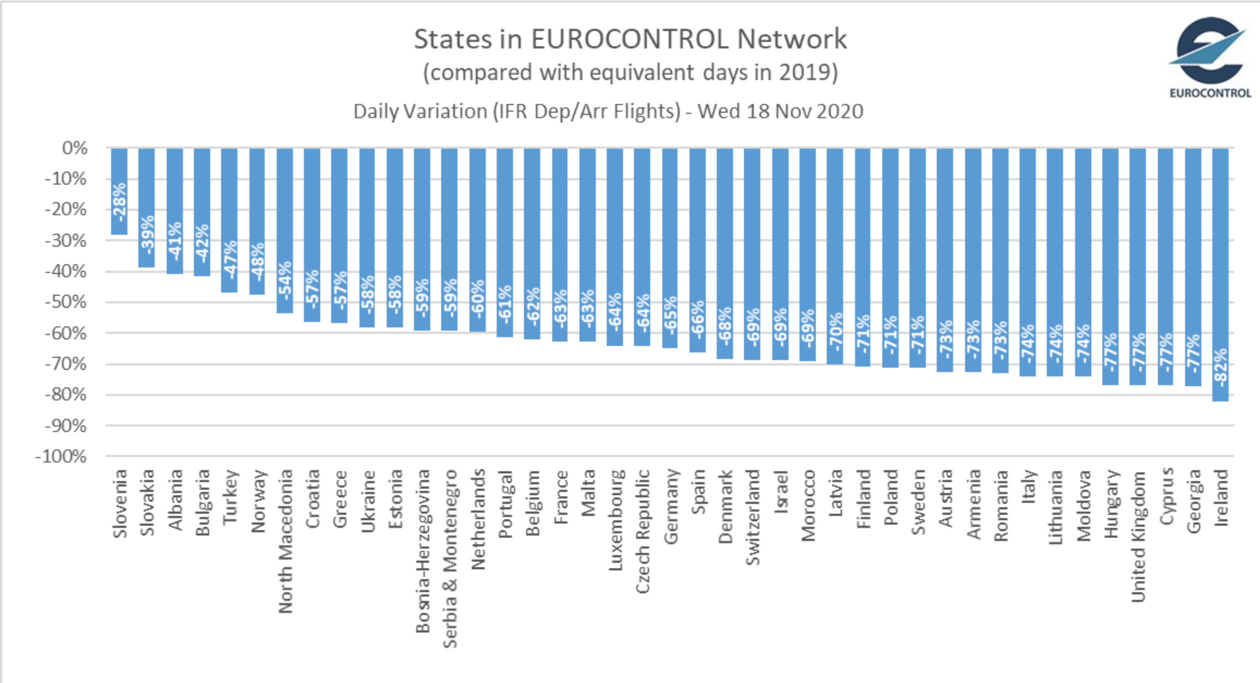
States

- Based on traffic levels, the Top 8 busiest States[1] have changed compared to last week with UK moving from the 2nd to the 4th rank, France back to the 2nd from the 4th and Spain back to the 5th from 7th. Germany remained the State with the highest number of dep/arr flights with 1853 flights on Wednesday 18 November (-7% over 2 weeks) followed by France (1410, -10%), Turkey (1173, -10%), the UK (1092, -40%), Spain (1089, -4%), Norway (838, -16%), Italy (748, -31%) and the Netherlands (605, -12%).



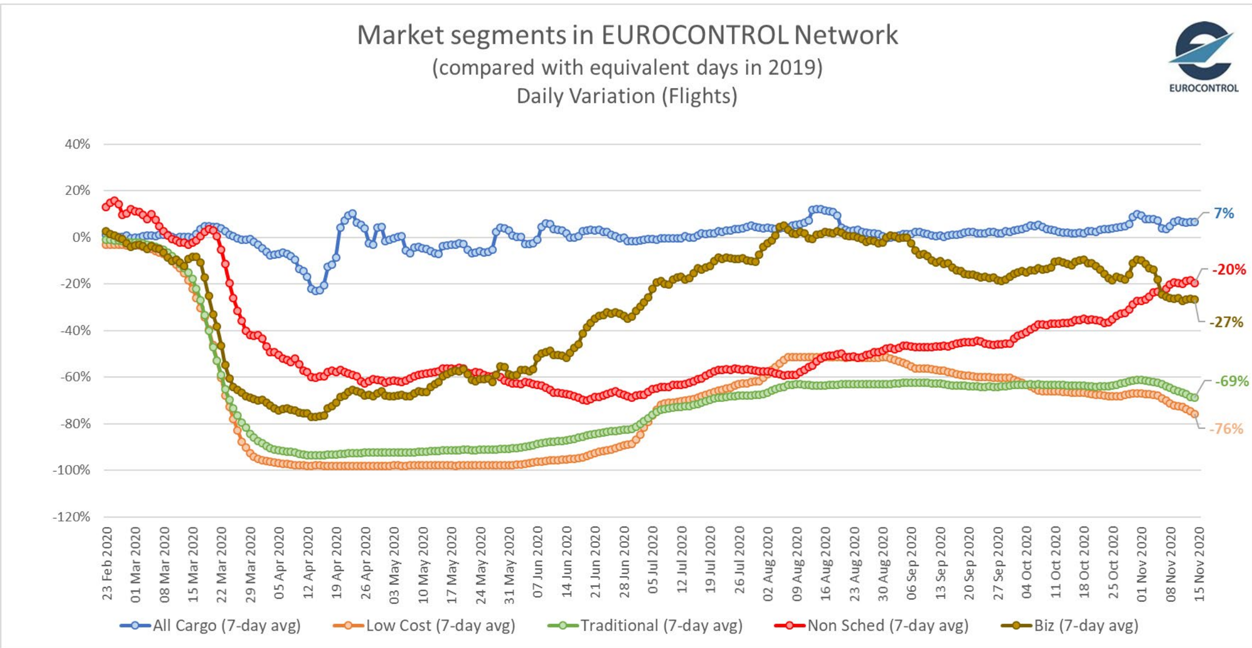
- Compared to 2019, Departure/Arrival traffic in the UK was -77% on Wednesday 18 November, Italy (-74%), Spain (-66%), Germany (-65%), France (-63%), Norway (-48%) and Turkey (-47%).

[1] excluding overflights.



Market Segments:

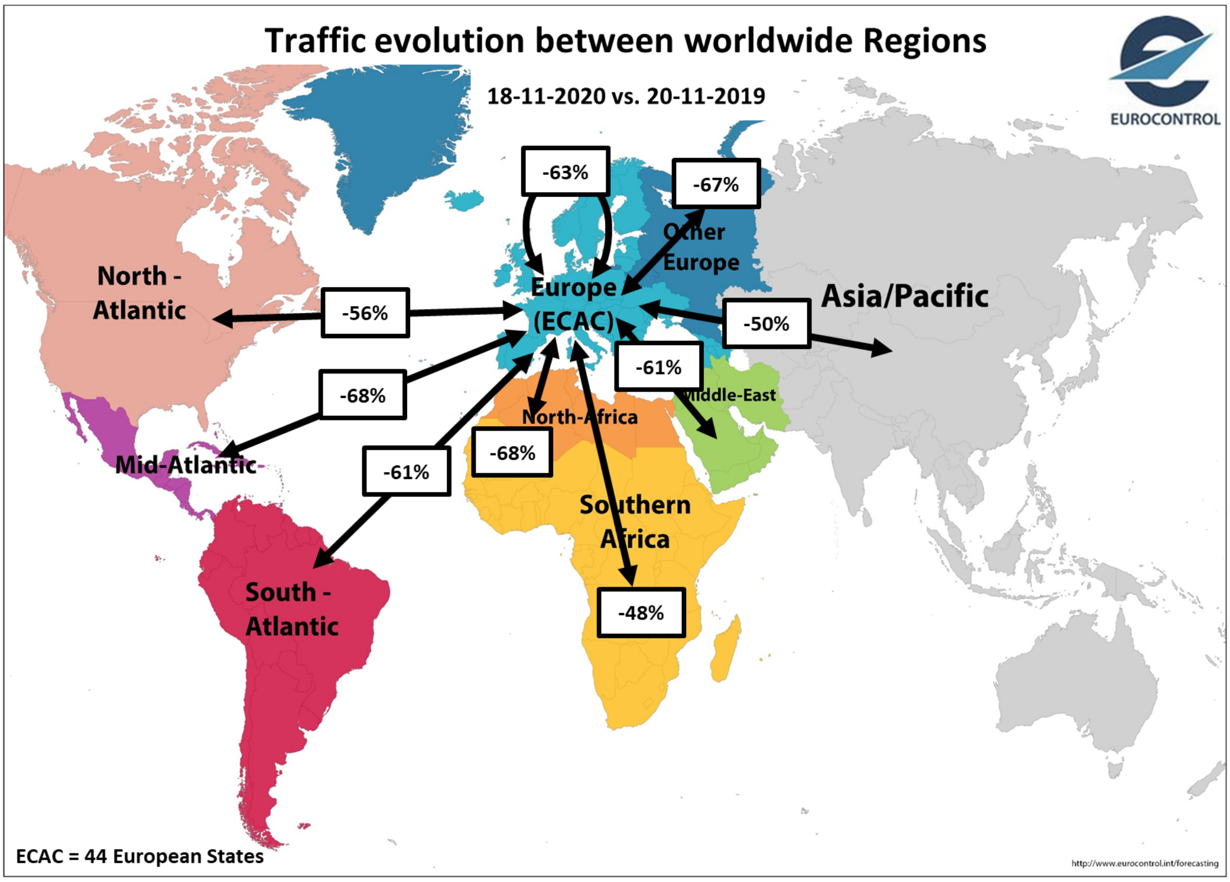
- After a fast recovery since mid-April reaching 2019 level in August and decrease afterwards, Business Aviation has decreased over the last week reaching -27% vs. 2019. All-cargo remains globally stable at 2019 levels (+7%). Low-cost flights decreased since early September reaching -76% vs 2019. Charter flights are steadily increasing reaching -20%.

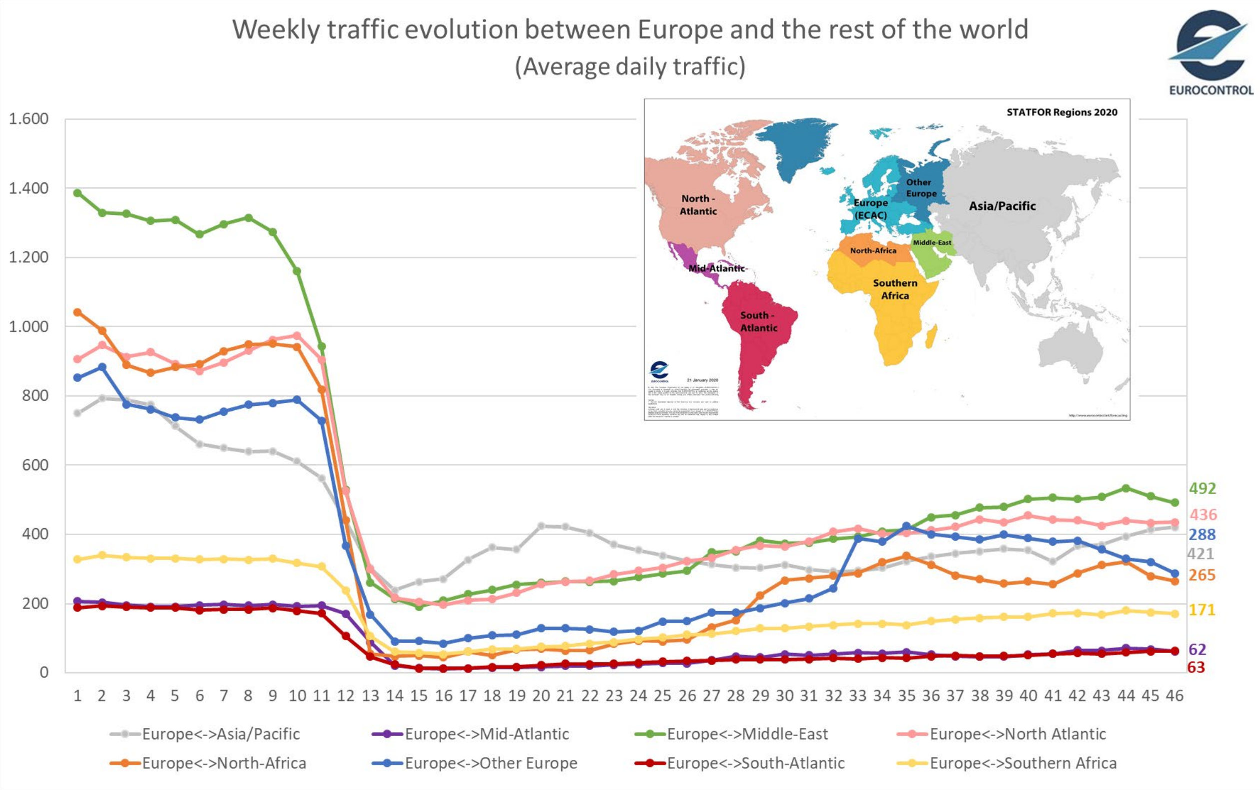


2. Traffic Flows & Country Pairs

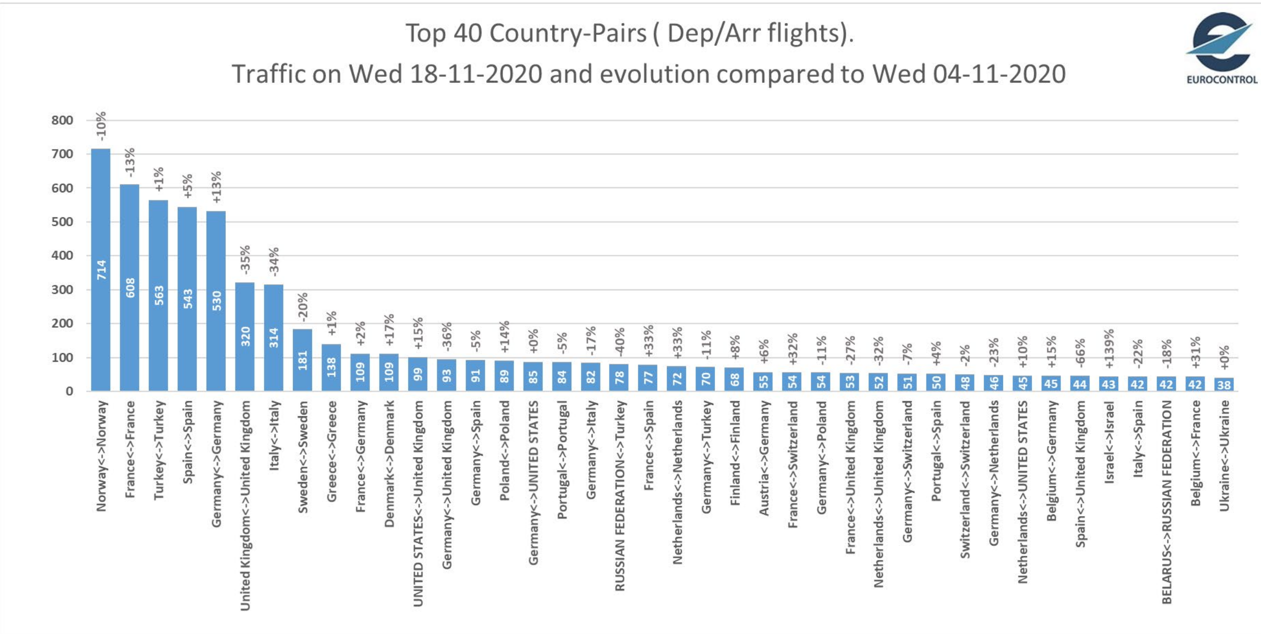
- The main traffic flow is the intra-Europe flow with 7,729 flights on Wednesday 18 November, which is decreasing (-15%) over 2 weeks.
- The top traffic flows with Europe were with "Middle-East" (503 flights, -6%) followed by "North-Atlantic" (434 flights, +8%), "Asia/Pacific" (399 flights, -5%), "Other Europe" (264 flights, -23%) and "North-Africa" (249 flights, -4%).
- Intra-Europe flights are at -63% compared to 2019 while all other flows are at -60%.

REGION	04-11-2020	18-11-2020	%	vs. 2019
Intra-Europe	**9.062**	**7.729**	***-15%***	***-63%***
Europe<->Asia/Pacific	421	399	*-5%*	*-50%*
Europe<->Mid-Atlantic	68	51	*-25%*	*-68%*
Europe<->Middle-East	535	503	*-6%*	*-61%*
Europe<->North Atlantic	401	434	*+8%*	*-56%*
Europe<->North-Africa	260	249	*-4%*	*-68%*
Europe<->Other Europe	341	264	*-23%*	*-67%*
Europe<->South-Atlantic	56	71	*+27%*	*-61%*
Europe<->Southern Africa	161	169	*+5%*	*-48%*
Non Intra-Europe	**2.243**	**2.140**	***-5%***	***-60%***

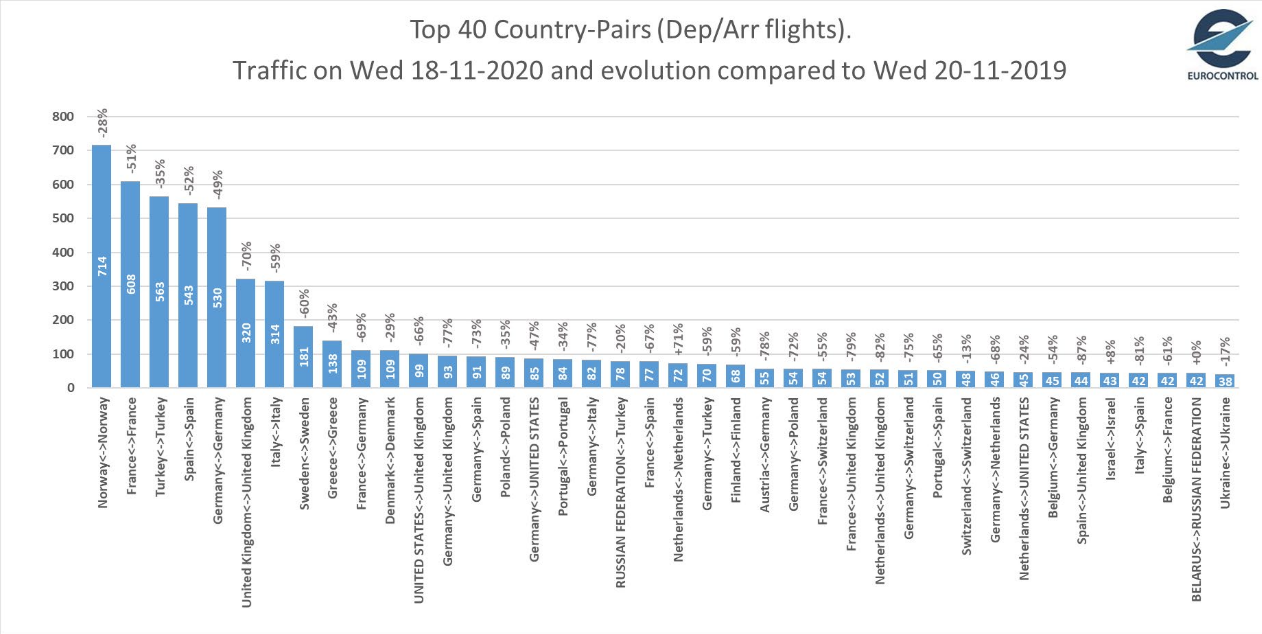




- Domestic flows are the most active flows (i.e. 9 of the top 10 flows are domestic). From the top domestic flows, Germany (+13%), Spain (+5%), Turkey (+1%) and Greece (+1%) showed an increase over 2 weeks. All other domestic flows decreased like in the UK (-35%), Italy (-34%), Sweden (-20%), France (-13%) and Norway (-10%).
- The busiest non domestic flows were France-Germany (109 flights, +2%), US-UK (99 flights, +15%), UK-Germany (93 flights, -36%) and Germany-Spain (91 flights, -5%).

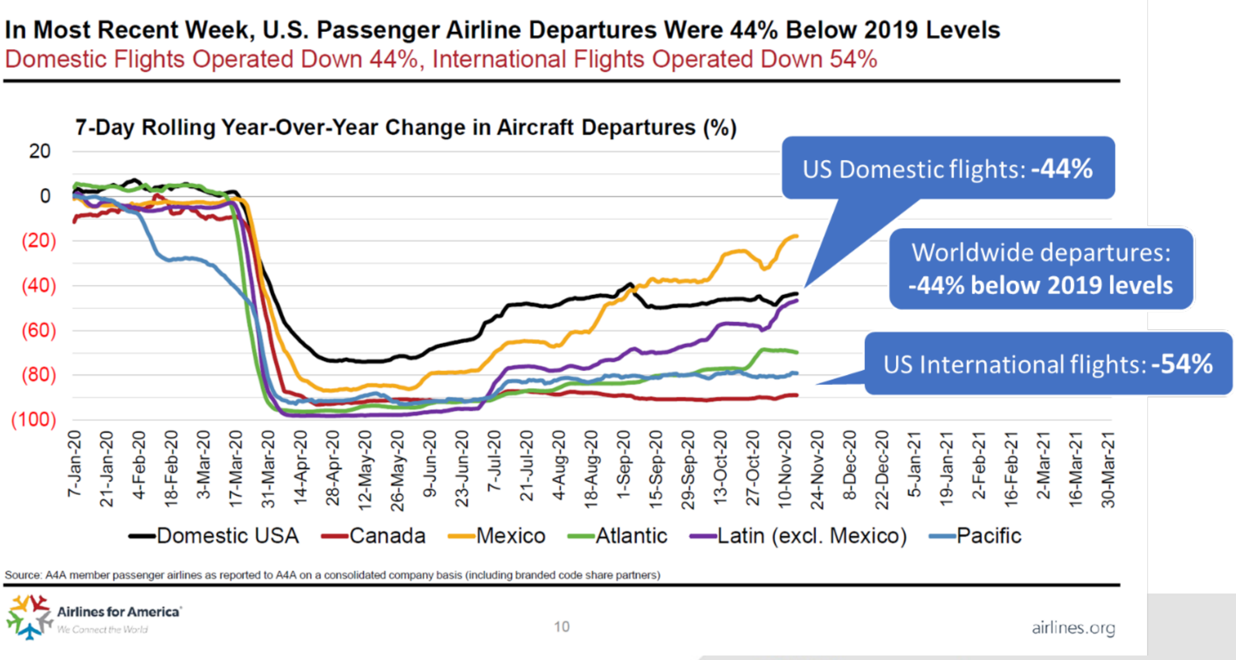


- Compared to 2019, domestic flows within the UK were -70% on Wednesday 18 November 2020, followed by Sweden (-60%), Italy (-59%), Spain (-52%), France (-51%), Germany (-49%), Turkey (-35%) and Norway (-28%).

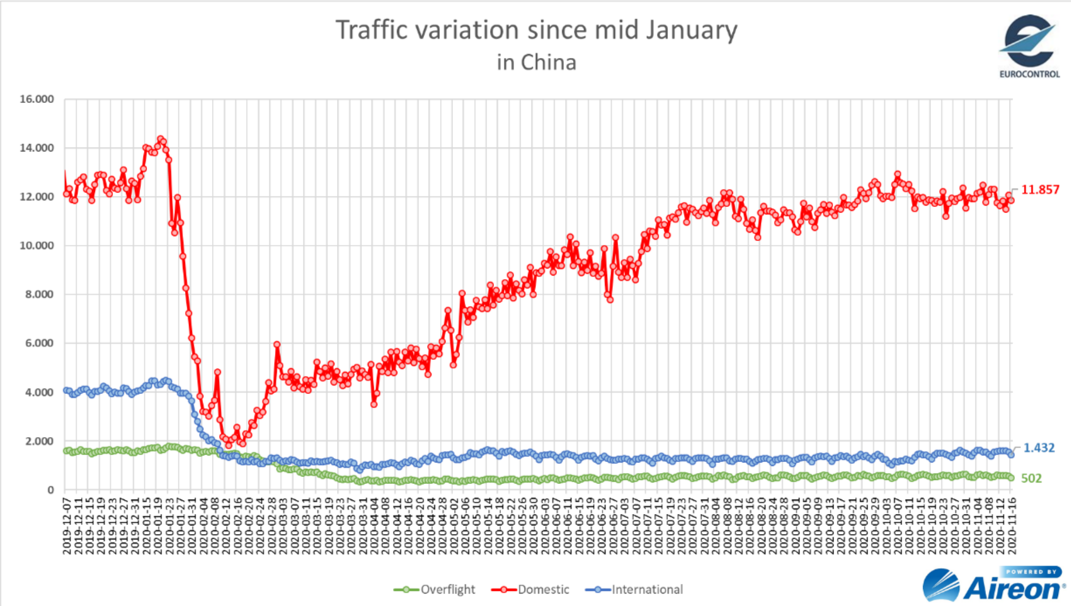


3. Situation outside Europe

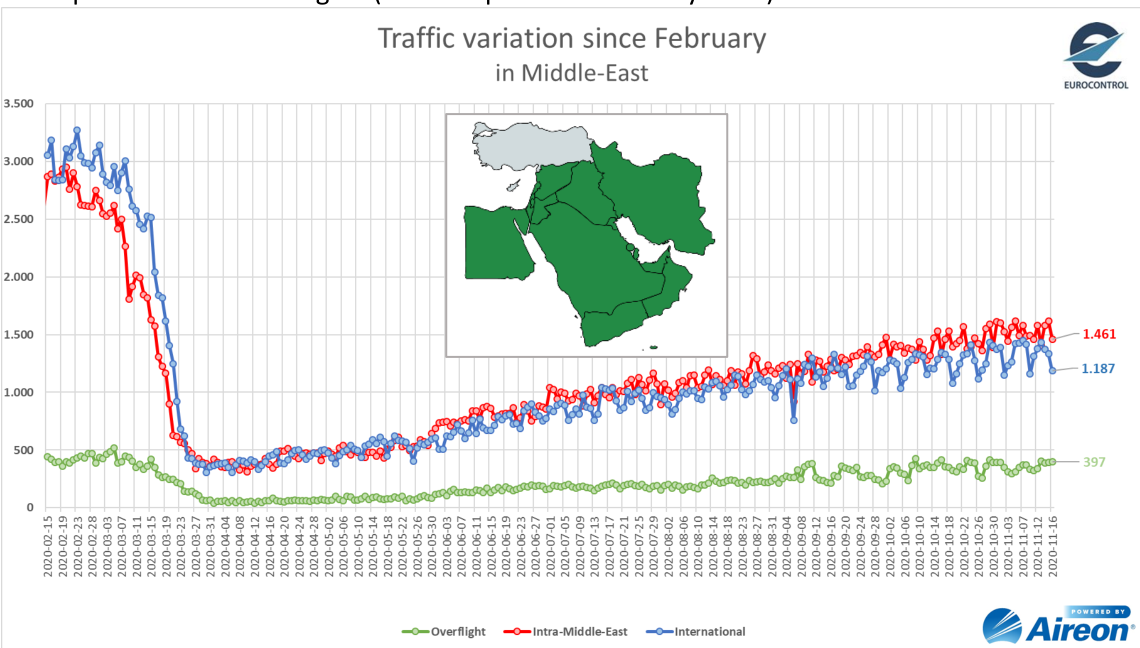
- **United-States (A4A members):**
  - US domestic traffic is stable at -44% of 2019 on 17 November. Flows with Latin America and Mexico increased over the last week but this might be an effect of the winter schedule in 2019.
  - In week ending Nov 17, U.S. airlines passenger volumes was 63% below year-ago levels with Domestic Air Travel down 62% and International down 72%.
  - The domestic U.S. Load Factor averaged 53% in most recent week, versus 80% a year earlier.



- **China:**
  - Chinese domestic flights are now stable with 11,857 flights (+0% compared to 1st January 2020). International flights have been stable since March with 1,432 flights (-65% compared to 1st January 2020). The same is true for overflights with 502 flights (-68% compared to 1st January 2020).



- **Middle East:**
  - Since the beginning of April, Intra-Middle-East traffic has been increasing slowly reaching 1,461 flights on 16 November (-47% compared to February 2020). International traffic has been recovering at the same levels as domestic from early April with 1,187 flights (-61% compared to February 2020). Overflights have started to increase since the second week of September with 397 flights (-7% compared to February 2020).

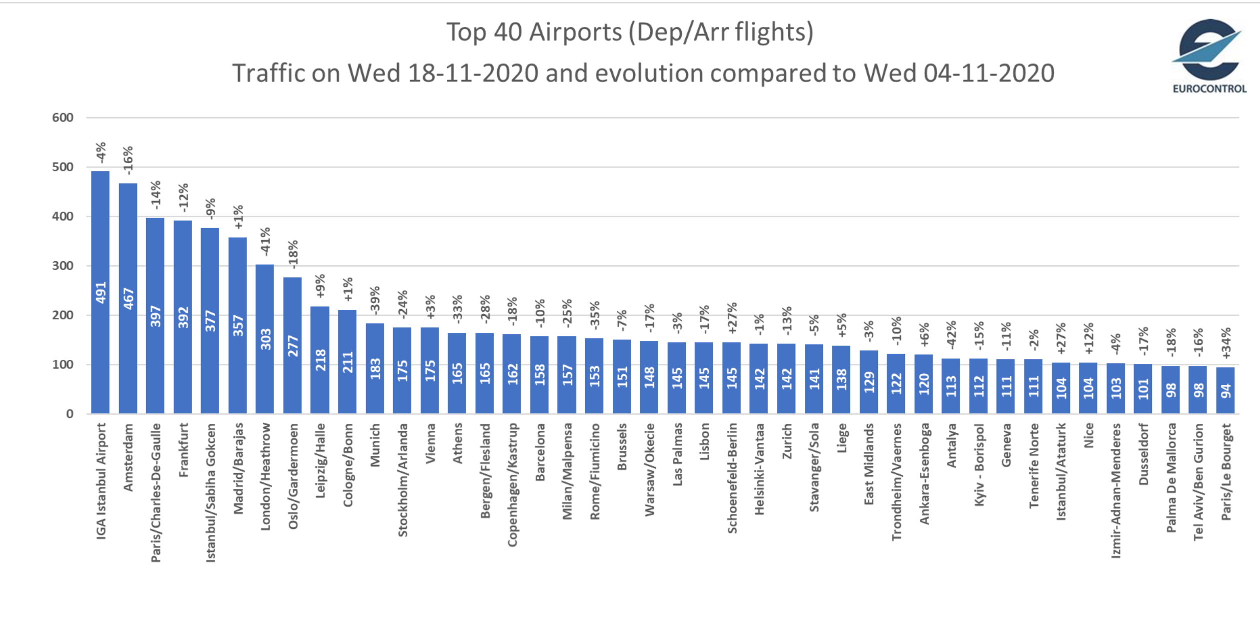


News for worldwide airlines and ANSPs:

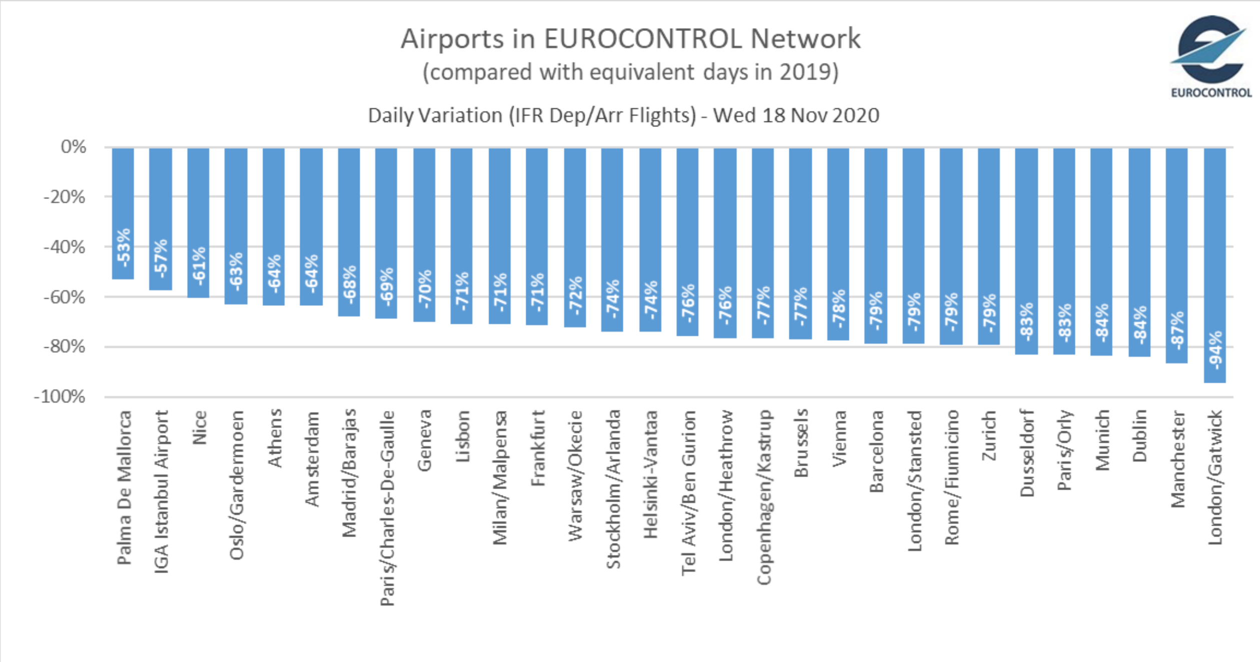
- **Air Canada** considering permanently converting several of its 767s to freighters.
- **Air China Group** reports passenger numbers down 13.8%, helped by a 3.6% increase in domestic passengers.
- **Cathay Pacific Group** in October – passenger numbers down 98.6% with a load factor of 18.2%; cargo down 37.6%; suspending services to Gatwick, Newark, Washington, Seattle, Maldives, Brussels and Dublin.
- **Emirates Group** announces a loss of $3.8 billion for six months to 30 September 2020, the first half year loss in over 30 years.
- **Iraqi Airways** plans to resume direct service to five European destinations from mid-December.
- **Qatar Airways** resuming a number of routes; currently operating 700 weekly flights to over 100 destinations and plans to increase to more than 125 destination by the end of the winter season.
- **Singapore Airlines Group** reports passenger numbers in October down 98.5%, with a load factor of 15.8%.
- **Singapore:** Singaporeans will be able to travel to Hong Kong for leisure from Nov 22, in the first air travel bubble arrangement for the Republic since border restrictions were imposed amid the Covid-19 pandemic. The scheme will start with one flight a day into each city with a quota of 200 travellers per flight.

4. Airport Information

- İGA Istanbul Airport was the busiest airport with 491 Dep/Arr flights on 18 November (-4% over the last 2 weeks) followed by Amsterdam (467, -16%), Paris CDG (397, -14%), Frankfurt (392, -12%), Istanbul/Sabiha (377, -9%), Madrid (357, +1%), London/Heathrow (303, -41%) and Oslo (277, -18%).
- From the top 10 airports, Leipzig (+9%) and Madrid (+1%) showed an increase over 2 weeks. All other airports reported a decrease like London/Heathrow (-41%), Oslo (-18%), Amsterdam (-16%), Paris CDG (-14%), Frankfurt (-12%), Istanbul/Sabiha (-9%) and İGA Istanbul Airport (-4%).



- Compared to 2019, İGA Istanbul Airport operated at -57% on 18 November, Oslo (-63%), Amsterdam (-64%), Madrid (-68%), Paris CDG (-69%), Frankfurt (-71%), London Heathrow (-76%) and Roma (-79%).

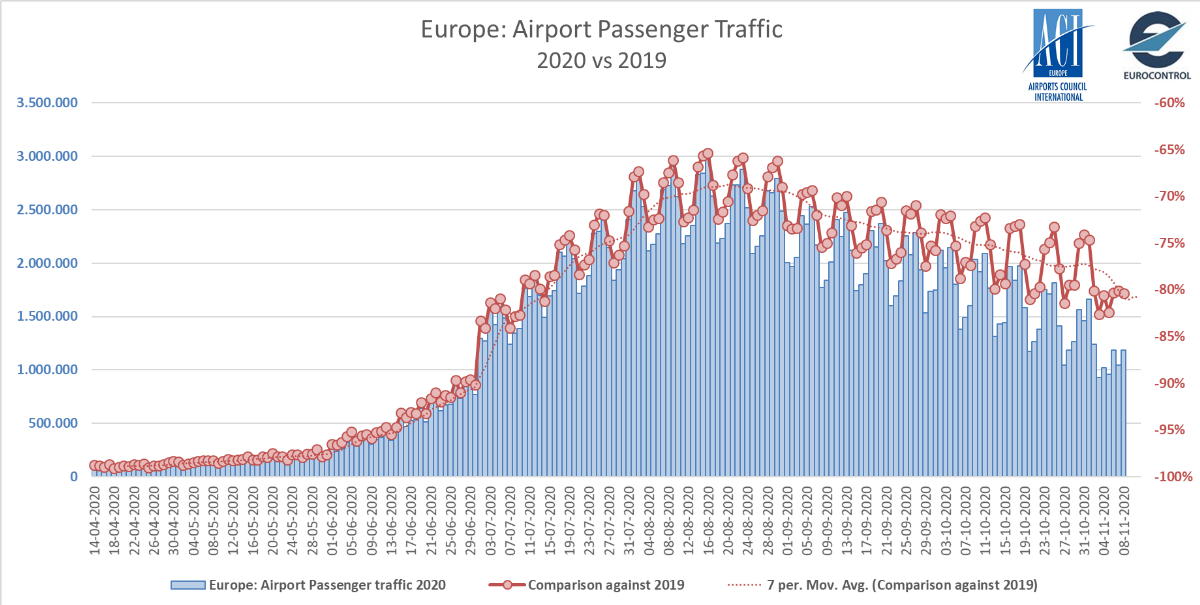


News from European and worldwide airports:

- **Copenhagen Airport** passenger numbers in October down 85.5%; to close areound 40% of terminal space from late November.
- **Frankfurt Airport** passenger numbers in October down 83.4%.
- **Geneva Airport** passenger numbers in October down 85.4%.
- **Helsinki Airport** passenger numbers in October down 92.3%.
- **Kuala Lumpur Airport** passenger numbers down 95.8% in October.
- Passenger numbers at each of **Manchester, London Stansted and East Midlands airports** fell 84% in October.
- **Munich Airport** passenger numbers in October down 86.9%.
- **Paris CDG Airport** has a new climate controlled storage area 'about to be finished' with another storage facility already open at Schiphol.
- **Tel Aviv Ben Gurion airport** establishing testing centre.
- **Flughafen Wien Group** expects a net loss of €75-85 million for 2020.
- **Zurich Airport** passenger numbers in October fell 84% (intra-Europe -80%, intercontinental -94%).

Passengers:

- According to **ACI**, passenger traffic has remained stable in the summer at -69% over August compared to August 2019. On Sunday 8 November, ACI reported 1.2 million passengers compared to 6 millions on Sunday 10 November 2019 (i.e. -80%). Overall, since January 2020, Europe experienced a loss of 1.5 billion passengers compared to 2019 (-79%).

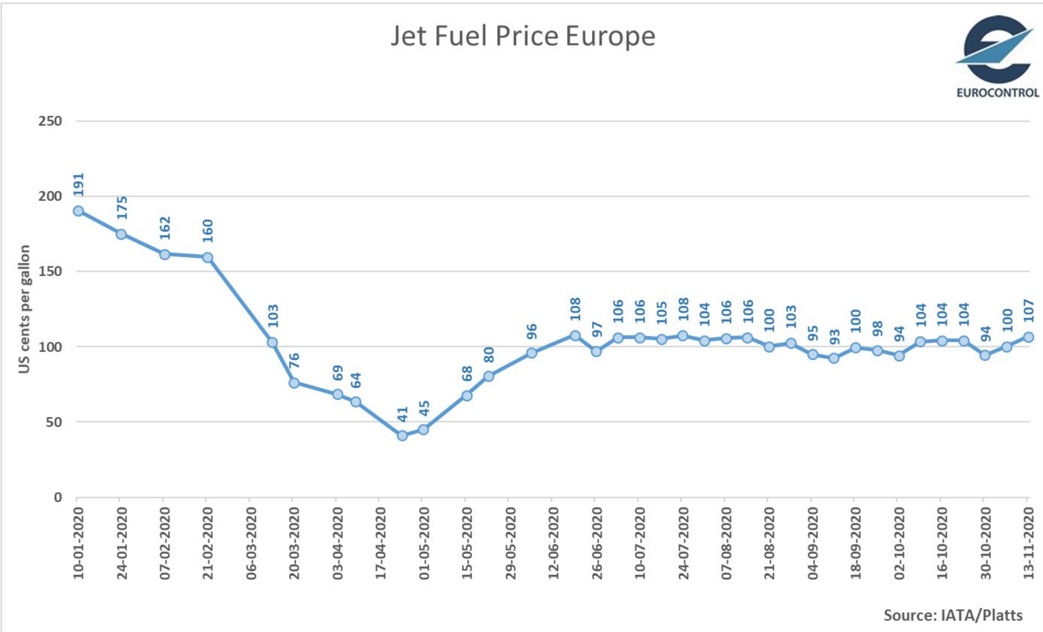


5. Economic, other factors

- **En-route air navigation charges:** After a bottom of 73M€ for April flights (i.e. -88% compared to plan), the amount billed for en-route charges was 260M€ for October flights (-62% compared to plan) after a maximum of 330M€ for August flights. On a year to date basis (Jan-Oct), route charges are -58% compared to plan for 2020.

Route Charges	Mid-Feb. billing	Mid-Mar. billing	Mid-Apr. billing	Mid-May billing	Mid-Jun. billing	Mid-Jul. billing	Mid-Aug. billing	Mid-Sept. billing	Mid-Oct. billing	Mid-Nov. billing
Total net chargeable amounts (VAT excl.)	547 M€	516 M€	357 M€	73 M€	95 M€	120 M€	255M€	330M€	287M€	260M€

- **Fuel Price:** Since the end of June, fuel price remains globally stable. It was at 107 cts/gal on Friday 13 November.



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.