COVID-19 Impact on EUROCONTROL Member States

EUROCONTROL Briefing

Tuesday, 24 November 2020

Poland

Loss of flights

-212k (-67%)

Dep/Arr flights vs. 2019 since 1st March

Total economy GDP[2]

-3.0%

2020 vs. 2019

Key facts:

Flights last week vs. 2019:

- Warsaw -74%
- Gdansk -69%
- LOT -74%
- Ryanair -82%
- Wizz Air -90%
- Domestic flows -39%
- European flows -72%

Loss of Passengers[1]

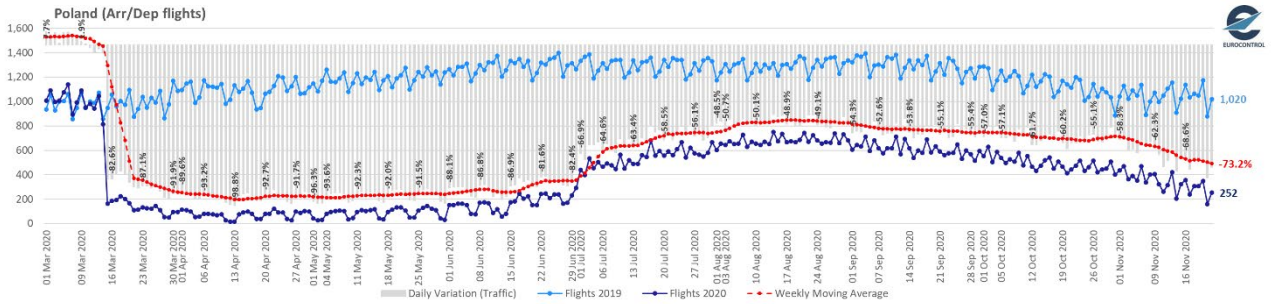
-26M (-80%)

2020 vs. 2019 (March-September)

Total job losses[3]

-173k

At end September



- **COVID Crisis/Economy:** Poland ranks 26th worldwide in terms of COVID deaths[4] and 10th in Europe. Its economy has not been as badly hit as some other European economies that are more reliant on tourism. The expected GDP decrease in 2020 is -3.0% and job losses amount to 173,000 up to September.
- **Traffic:** Traffic started a dramatic decline on 15 March – to more than -80% (vs. 2019) only one week later. Through April and May it was worse than -90%. After a slow recovery in June, traffic picked up early July and reached its peak 14 August with 749 flights. The decline has been steady since and, despite a small recovery late October, it has sharply accelerated in November. In terms of overall traffic loss, Poland ranks 11th in Europe with -212k flights up to last week and -26M passengers lost between March and September.
- **Airports:** Warsaw is by far the top airport in Poland with 135 average movements per day over the last week (-74% vs. 2019). The other top airports have suffered similar reductions except for Deblin military air base.
- **Aircraft Operators:** LOT remains the top airline operating at -74% last week followed by Ryanair (-82%) and Wizz Air (-90%). KLM is the least affected of the major airlines (-35%) overtaking Lufthansa in 4th position. Three cargo airlines, SprintAir (+119%), DHL Express (+13%) and TNT Intl. (+9%) are now in the top ten.
- **Market segments:** As in most States, all cargo remained stable. Business aviation recovered quickly reaching 2019 levels in August. Non-scheduled initially suffered less than others, even peaking in March, but struggled from June onwards. Low-cost managed to recover faster than traditional, both being the hardest hit initially.
- **Traffic flows:** Domestic flows are now top flows (-39% vs. 2019) whereas they were only 3rd last year after Germany and the UK. Top non-ECAC flows are with non-ECAC Europe, North Atlantic and Asia/Pacific.

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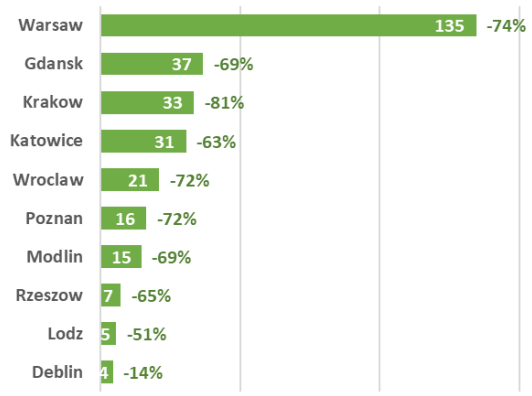
POLAND - Top 10 Airports

Week from 16-Nov-2020 to 22-Nov-2020

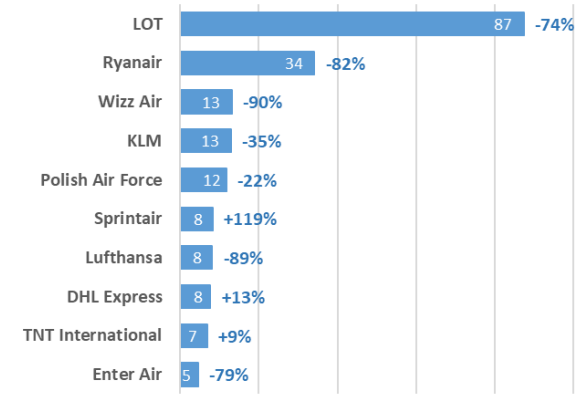
avg daily movements (dep+arr) and % vs. 2019



POLAND - Top 10 Aircraft Operators

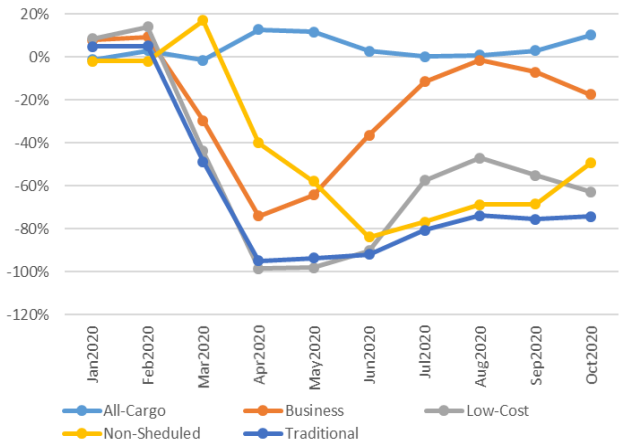
Week from 16-Nov-2020 to 22-Nov-2020

avg daily flights (dep/arr) and % vs. 2019



POLAND - Market Segments

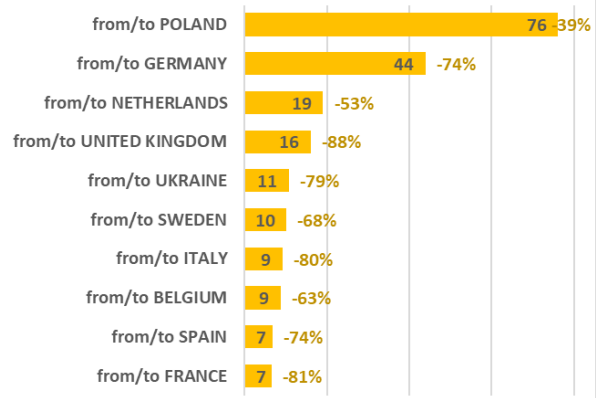
Monthly variation % vs 2019



POLAND - Top 10 Country Pairs

Week from 16-Nov-2020 to 22-Nov-2020

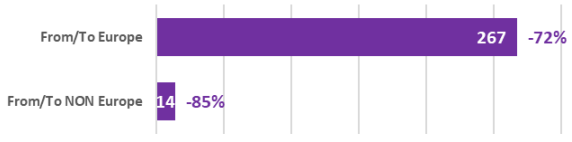
avg daily flights (dep/arr) and % vs. 2019



POLAND - Top Region Pairs

Week from 16-Nov-2020 to 22-Nov-2020

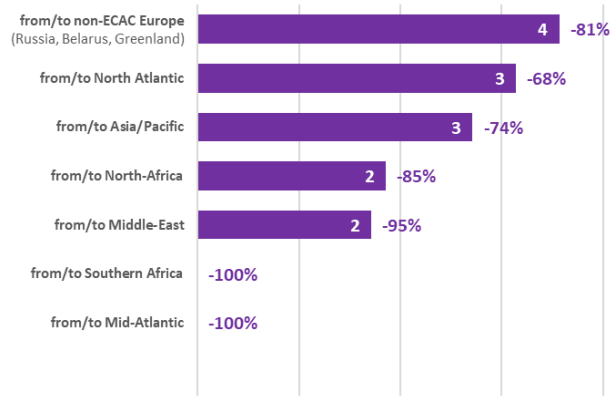
avg daily flights (dep/arr) and % vs. 2019



POLAND - Top Region Pairs

Week from 16-Nov-2020 to 22-Nov-2020

avg daily flights (dep/arr) and % vs. 2019



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Data Sources:

[1] *Regional Airports Association*

[2] *Oxford Economics (16 October 2020)*

[3] *Statistics Poland*

[4] *John Hopkins University*

Contacts:

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