COVID-19 Impact on EUROCONTROL Member States
EUROCONTROL Briefing

Tuesday, 24 November 2020

Poland

• **COVID Crisis/Economy:** Poland ranks 26th worldwide in terms of COVID deaths 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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Data Sources:
1 Regional Airports Association
2 Oxford Economics (16 October 2020)
3 Statistics Poland
4 John Hopkins University

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