COVID19 Impact on European Air Traffic
EUROCONTROL Comprehensive Assessment

EUROCONTROL

Thursday, 3 December 2020

Traffic Situation & Airlines Recovery

- **9,809 flights on Wednesday 2 December (-4% with 423 fewer flights over 2 weeks) reaching 36% of 2019 levels.** The 7-day moving average is still slowly decreasing, reaching -65% compared to 2019 but a plateau seems to be reached.
- **November flights** recorded a decline of 62% (compared to November 2019), slightly below the traffic scenarios (14 September edition). Since the beginning of the year, flight numbers in 2020 are 55% lower than the same period last year. December month starts at -65% but possible pick-up in traffic is expected.
- **Turkish Airlines** was the airline with the **highest** number of **flights** with 580 flights on Wed 2 Dec, stable compared to Wed 18 Nov (+18 flights, +0%). Cargo operator DHL Express was second busiest (305 flights, +6%, +16 flights) followed by Widerøe (295 flights, -6%, -19 flights), Ryanair (251 flights, +24%, +49 flights) and KLM (250 flights, -9%, -24 flights). Yesterday, **British Airways ranked 19th (86 flights, -9%) and easyJet 52nd (35 flights, 67%)**.
- Over 2 weeks, situation is balanced for busiest airlines with some **decreasing their capacities**: Widerøe (-19 flights, -6%), KLM (-24 flights,-9%), SAS (-58 flights, -20%) and Lufthansa (-9 flights, -4%) and some airlines **increasing their capacity** like Ryanair (+49 flights, +24%), Air France (+17 flights, +7%) and Iberia (+18 flights, +15%).
- In terms of dep/arr traffic, **Germany** remained the State with the highest number of dep/arr flights with 1,672 flights on Wed 2 Dec (-10% over 2 weeks) followed by **France (1,431, +1%)**, the UK (1,275, +17%), Turkey (1,097, -6%), Spain (1,068, -2%), Norway (722, -14%), **Italy (656, -12%)** and the Netherlands (534, -12%).
- **Business Aviation remained stable at** -25% in November (vs. 2019). **All-cargo remains slightly above** 2019 levels (+6%) while **Charter flights are steadily recovering weeks after weeks** reaching -15%. Traditional and Low-Cost, severely hit by the renewed lockdown and restrictions (2nd wave) are lagging behind at -72% and -84% respectively, with gap widening between both.

Traffic Flows & Country Pairs

- **The intra-Europe flow is the main flow** with 7,305 flights on 2 Dec (-5% over 2 weeks). Top traffic flows with Europe remains **"Middle-East"** (498 flights, -1%) followed by **"Asia/Pacific"** (419 flights, +5%).
- Intra-Europe flights are at -65% compared to 2019 while all other flows are at -60%.
- Situation quite balanced for top domestic flows with some increasing over 2 weeks: a few of them increasing **the UK (+23%)**, **France (+7%)** and Spain (+4%). All other (main) domestic flows decreased like in **Germany (-29%)**, Denmark (-27%), **Italy (-22%)**, Portugal (-19%), Sweden (-19%), Norway (-15%) and Turkey (-12%).
- Compared to a year ago, domestic flows within Italy and within Denmark were -68% each on Wednesday 2 December 2020, followed by Germany (-72%), the UK (-64%), Spain and France (-50% each) and Greece (-44%).

Airports

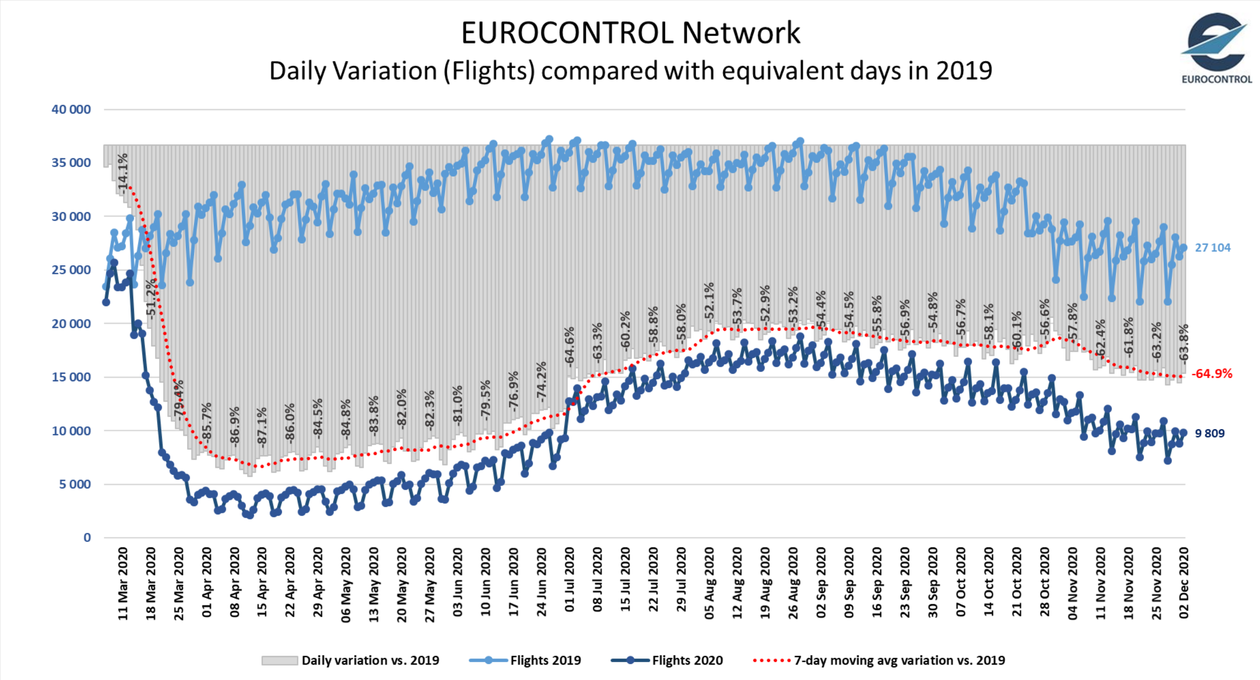
- **ACI EUROPE** reported that on Sunday 22 November, European airports welcomed **just below 1 million passengers** compared to 5.9 million on Sunday 24 November 2019 (i.e. -83%). Overall, since January 2020, European airports experienced a loss of **1.5 billion passengers** compared to 2019 (-80%).
- **İGA Istanbul Airport was the busiest airport** with 435 Dep/Arr flights on 2 Dec (stable over the last 2 weeks) followed by Amsterdam (435, -7%), Paris CdG (394, -1%), Frankfurt (378, -4%), Madrid (373, +4%), Istanbul/Sabiha (327, -13%), London/Heathrow (322, +6%) and Cologne (242, +15%).
- From the top 10 airports, **Cologne (+15%)**, London/Heathrow (+6%), Leipzig (+5%) and Madrid (+4%) showed an increase over 2 weeks. İGA Istanbul Airport remained unchanged. **All other airports reported decreases like Oslo (-18%)**, Istanbul/Sabiha (-13%), Amsterdam (-7%), Frankfurt (-4%) and Paris CdG (-1%).
- **The biggest increases** were recorded at **London Stansted (**131 flights, **+68%)**, **Tel Aviv Ben Gurion (**132, **+35%)**, **Marseille (**99, **+32%)** and **Paris Le Bourget (**123, **+31%)**. At the other end of the scale, biggest decreases were recorded at Stavanger (89,-37%), Trondheim (96, -21%), Antalya (90, -20%) and Oslo (226, -18%).

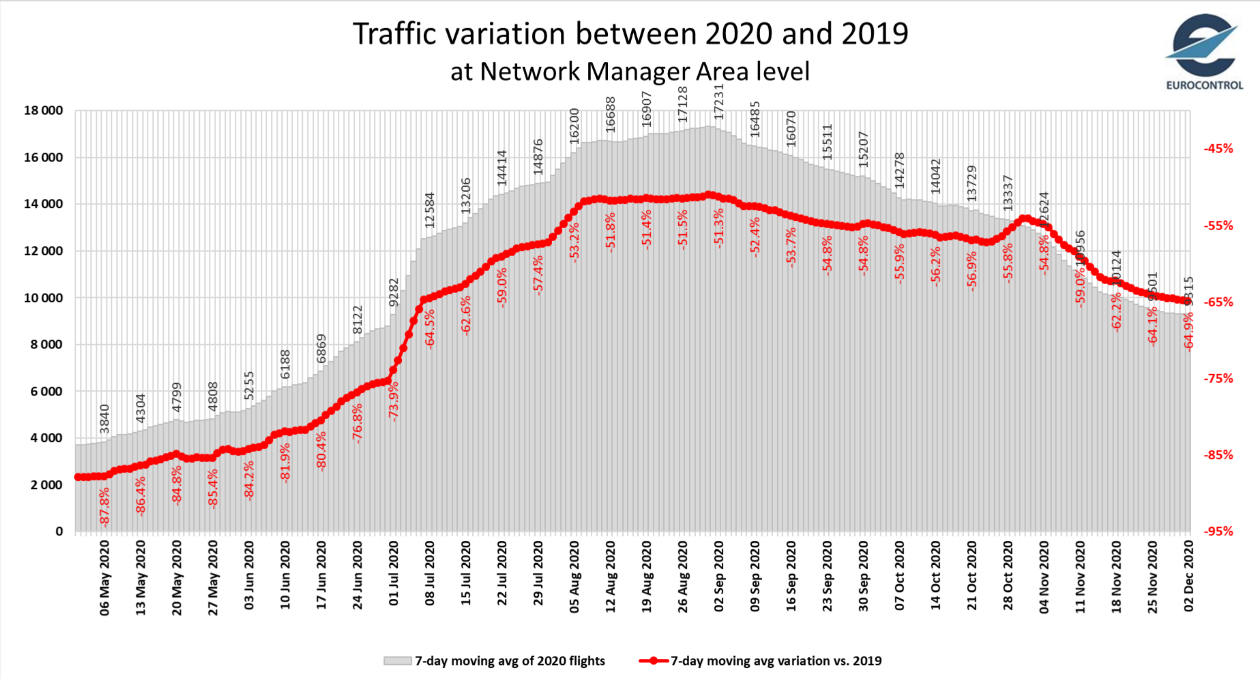
Other

- **Fuel price:** Fuel price slightly increased in November to 123 cts/gal on 30 November (but still 33% below prices for same date in 2019).

1. Traffic Situation and Airlines Recovery

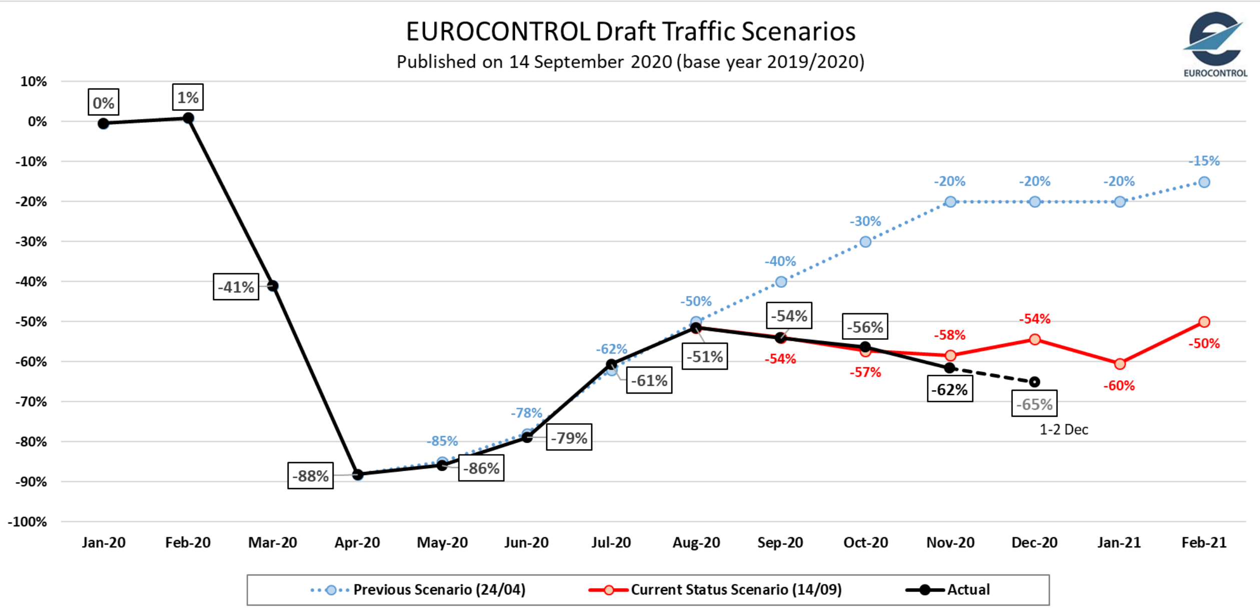
- 9,809 flights on Wednesday 2 December (-4% with -423 flights compared to Wednesday 18 November). This is 36% of 2019 traffic levels. Based on a 7-day moving average, the decrease is-65% compared to 2019 and seems to have reached a plateau. Indeed, the rate of the decrease on a weekly basis has slowed down over the past week.





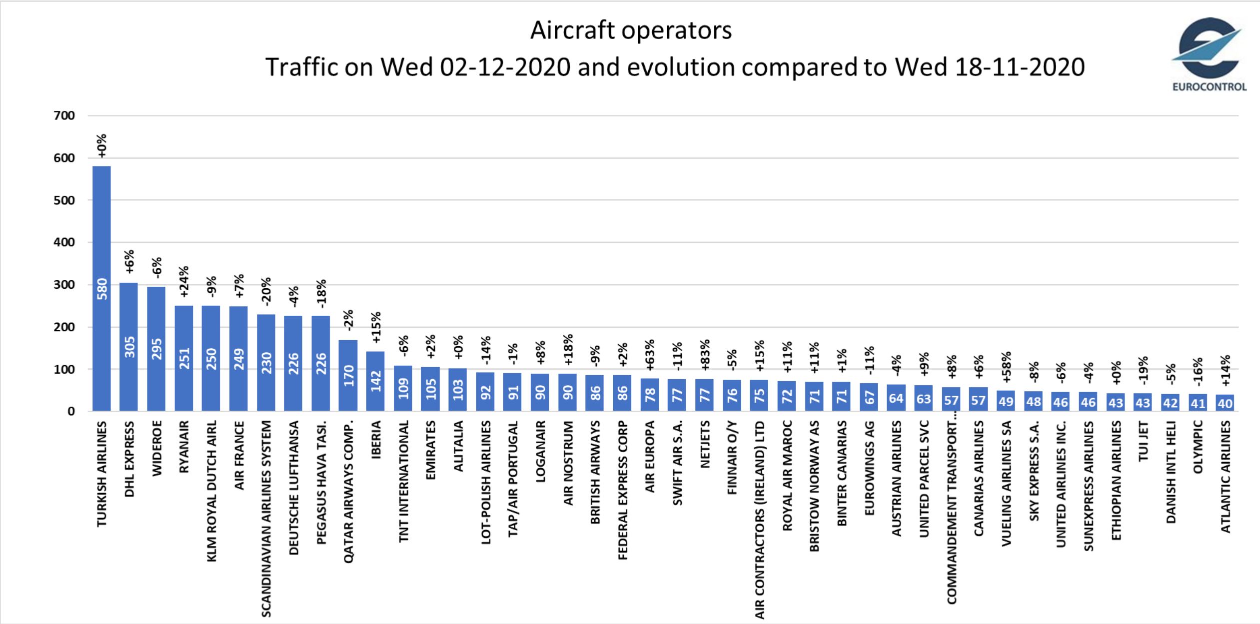
Overall situation against EUROCONTROL traffic scenarios:

- **November flights recorded a 62% decrease compared to November 2019**, slightly below the scenarios due to the renewed lockdown (2nd wave). First days of December currently stand at -65% (vs same period a year ago), but December traffic is expected to be slightly higher next week, with a more substantial lift the weeks after.

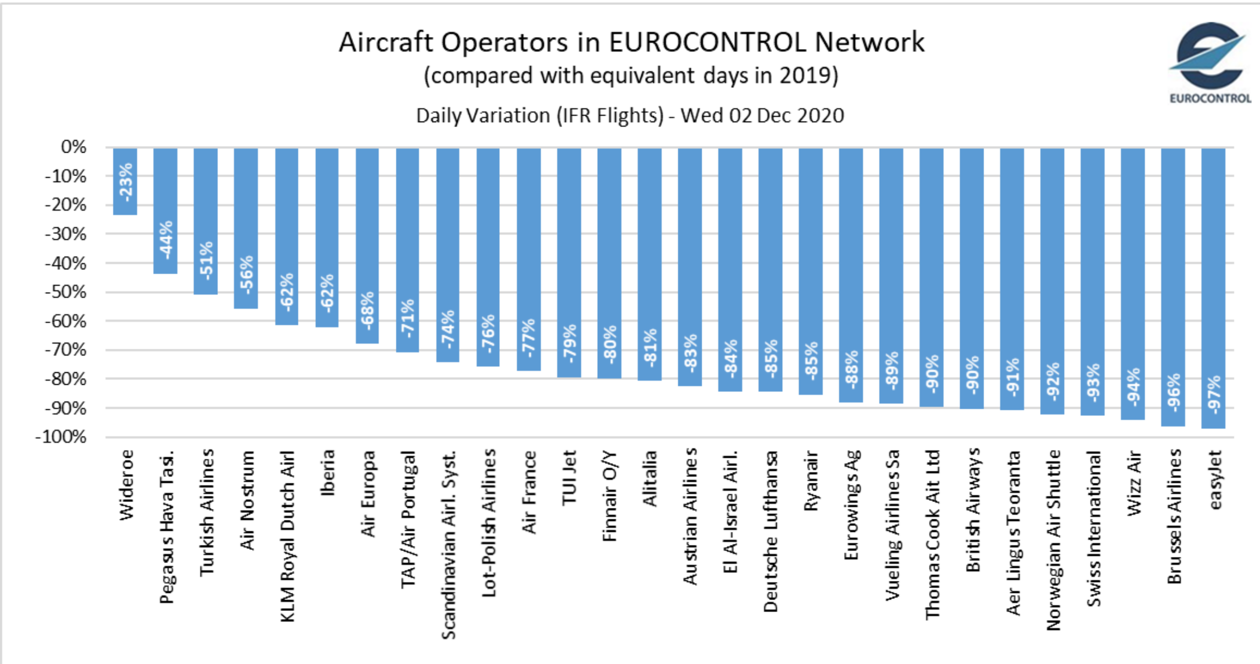


European Airlines:

- Turkish Airlines was the airline with the highest number of flights with 580 flights on Wednesday 2 December stable on Wednesday 18 November (+2 flights), followed by DHL express (305 flights, +6%, +16 flight), Widerøe (295 flights, -6%, -19 flights), Ryanair (251 flights, +24%, +49 flights), KLM (250 flights, -9%, -24 flights), Air France (249 flights, +7%,+17 flights), SAS (230 flights, -20%, -58 flights), Lufthansa (226 flights, -4%, -9 flights), Pegasus (226 flights, -18%, -51 flights), Iberia (142 flights, +15%, +18 flights), TNT International (109 flights, -6%, -7 flights), Emirates (105 flights, +2%, +2 flights) and Alitalia (103 flights, +0%, +0 flights). **Yesterday, British Airways was ranked 19th (with 86 flights, down 9%) and EasyJet 52nd (with 35 flights, up 67%).**
- Compared to two weeks ago, largest capacity decreases in percentage terms were recorded for: SAS (-58 flights,-20%), TUI (-10 flights, -19%), Pegasus (-51 flights, -18%), Olympic (-8 flights, -16%) and LOT (-15 flights, -14%). A few airlines increased their capacity like Ryanair (49 flights, +24%), Netjets (+35 flights, +83%) and Air Europa (+30 flights, +63%).



- Compared to 2019, Widerøe operated at -23% on Wednesday 2 December followed by Pegasus (-44%), Turkish Airlines (-51%), Air Nostrum (-56%), KLM (-62%), Iberia (-62%), Air Europa (-68%), TAP (-71%), SAS (-74%), LOT (-76%) and Air France (-77%).



News from key European airlines:

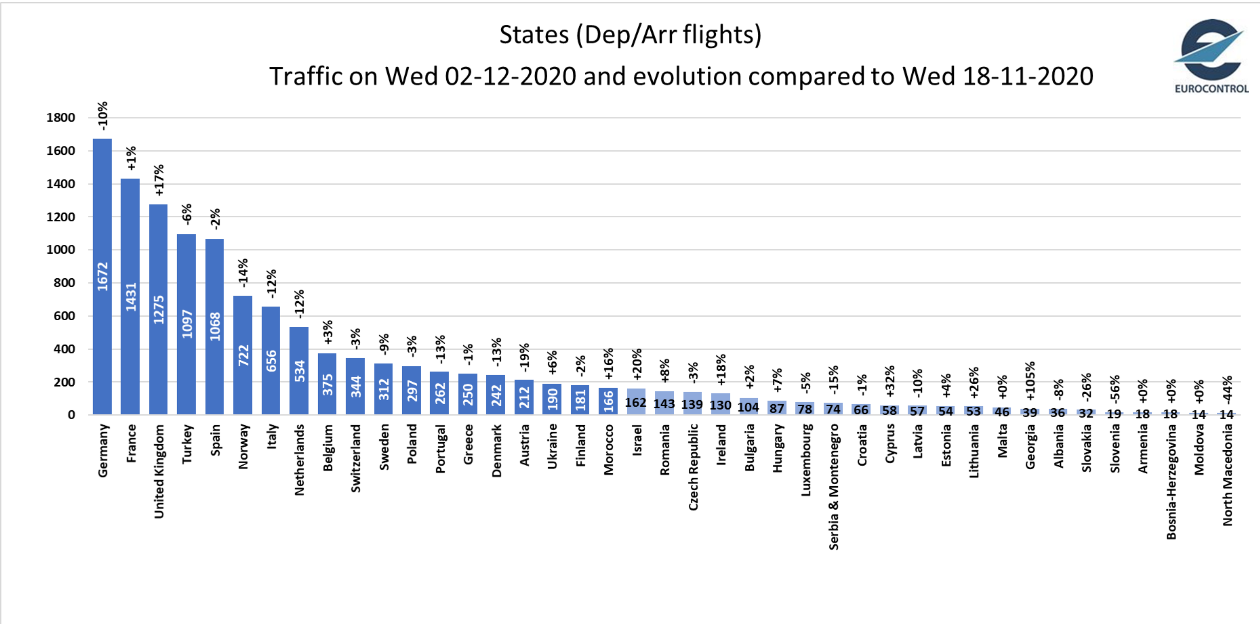
- **Air France** resuming service to Vancouver from mid December; resuming 13 seasonal domestic routes from 18 December to 3 January; increasing capacity to French overseas territories from mid December.
- **Austrian Airlines** extending mandatory antigen testing on services between Vienna and Hamburg until 15 December before extending the test service to other routes.
- **Condor** resuming services from Frankfurt to the Dominican Republic, Cuba and the Maldives from 18 December; considering additional temporary 767 conversions for carrying cargo; reports that

negotiations for its sale are not expected until 2022; terminates its protective shield proceedings, having restructured and reached agreements with unions

- **easyJet** reportedly planning to reduce its Italy based fleet from 36 to 27
- **El Al** reports a net loss of $391 million for the first nine months of the year; appoints Avigal Sereq as CEO; delaying delivery of a 787 from November to March (originally scheduled for March 2020)
- **LOT** planning to operate to more than 20 destinations next summer
- **SWISS** reducing workforce by around 1,000 over next two years; top management taking a wage reduction of 40% in 2020 and 30% in 2021
- **Virgin Atlantic** launching COVID-19 testing trial (free, pre-departure, lateral flow antigen test) for passengers on selected flights to Barbados, Antigua and Grenada
- **Wizz Air** offering ‘on demand charter solutions’ for businesses (entire aircraft, not individual requests).

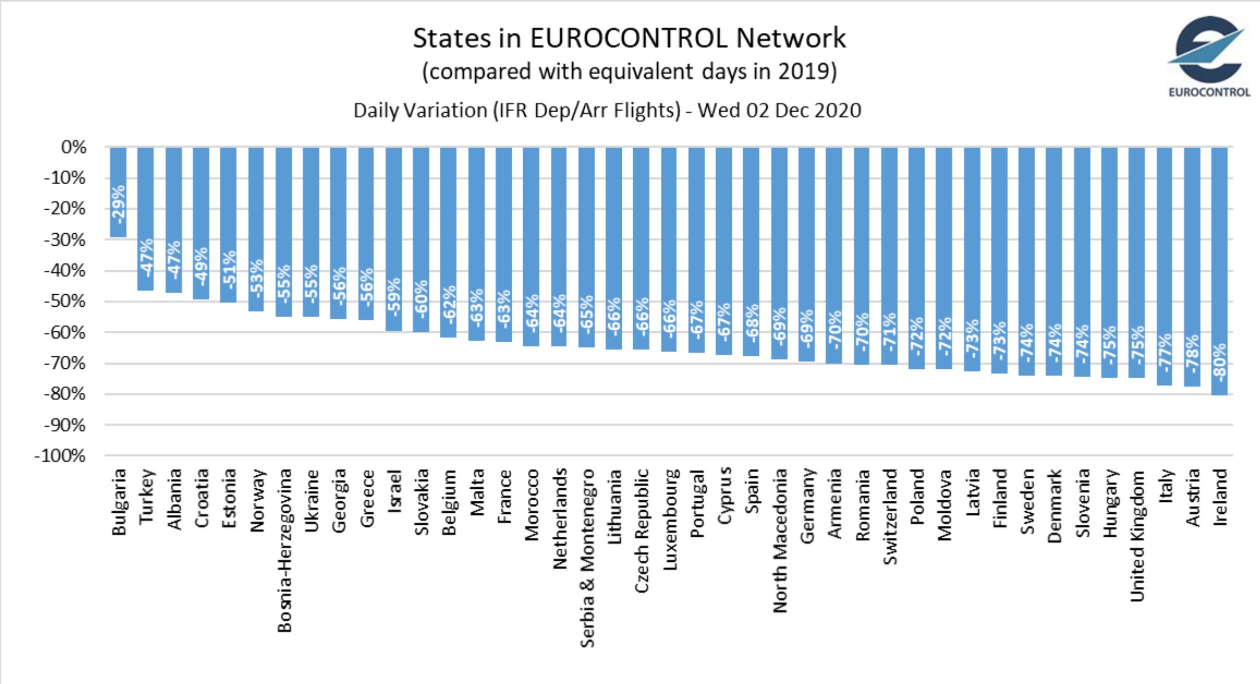
States

- Based on traffic levels, the Top 8 busiest States[1] remained stable: Germany remained the State with the highest number of dep/arr flights with 1,672 flights on Wednesday 2 December (-10% over 2 weeks) followed by France (1,431, +1%), the UK (1,275, +17%), Turkey (1,097, -6%), Spain (1,068, -2%), Norway (722, -14%), Italy (656, -12%) and the Netherlands (534, -12%).



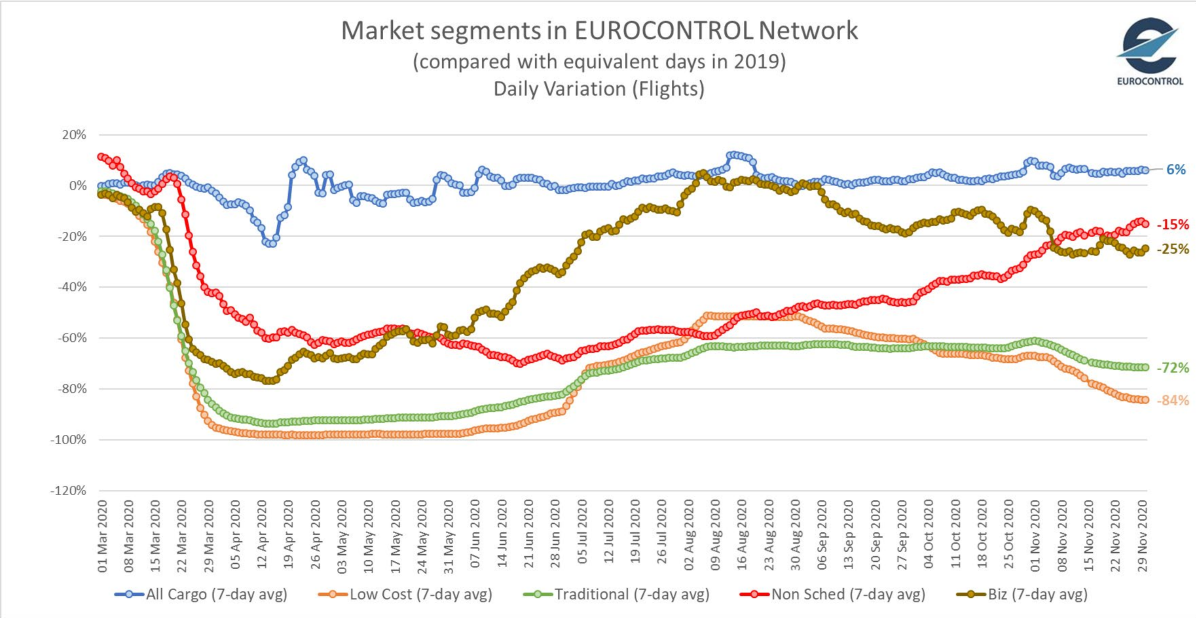
[1] excluding overflights.

- Compared to 2019, Departure/Arrival traffic in Italy was -77% on Wednesday 2 December, the UK (-75%), Germany (-69%), Spain (-68%), France (-63%), Norway (-53%) and Turkey (-47%).



Market Segments:

- At the end of November, **All-cargo** remains overall in line with 2019 levels (+6%). **Charter** flights are steadily recovering but still 15% below the 2019 levels. **Business Aviation** recorded a quick upturn end May which was confirmed by a recovery to 2019 levels at the end of the Summer. But, the segment started to decline again since September. It has now stabilised 25% below 2019 level over November. **Low-Cost** and **Traditional** segments, severely affected by the new lockdown measures (all over Europe) from end October, are respectively recording -84% and -72% declines (vs 2019). While Scheduled airlines decrease remained stable during the second half of November (vs November 2019), Low-Cost airlines have been recording continuous decrease.



2. Traffic Flows & Country Pairs

- The main traffic flow is the intra-Europe flow with 7,305 flights on Wednesday 2 December, which is decreasing (-5%) over 2 weeks.
- The top traffic flows with Europe were with “Middle-East” (498 flights, -1%) followed by “Asia/Pacific” (419 flights, +5%), “North-Atlantic” (415 flights, -4%), “North-Africa” (242 flights, -3%) and “Other Europe” (232 flights, -12%).
- Intra-Europe flights are at -65% compared to 2019 while intercontinental flows are at -60%.

REGION	18-11-2020	02-12-2020	%	vs. 2019
Intra-Europe	**7 729**	**7 305**	***-5%***	***-65%***
Europe<->Asia/Pacific	398	419	*+5%*	*-47%*
Europe<->Mid-Atlantic	51	68	*+33%*	*-55%*
Europe<->Middle-East	503	498	*-1%*	*-61%*
Europe<->North Atlantic	434	415	*-4%*	*-58%*
Europe<->North-Africa	249	242	*-3%*	*-69%*
Europe<->Other Europe	263	232	*-12%*	*-69%*
Europe<->South-Atlantic	71	67	*-6%*	*-64%*
Europe<->Southern Africa	169	165	*-2%*	*-50%*
Non Intra-Europe	**2 138**	**2 106**	***-1%***	***-60%***

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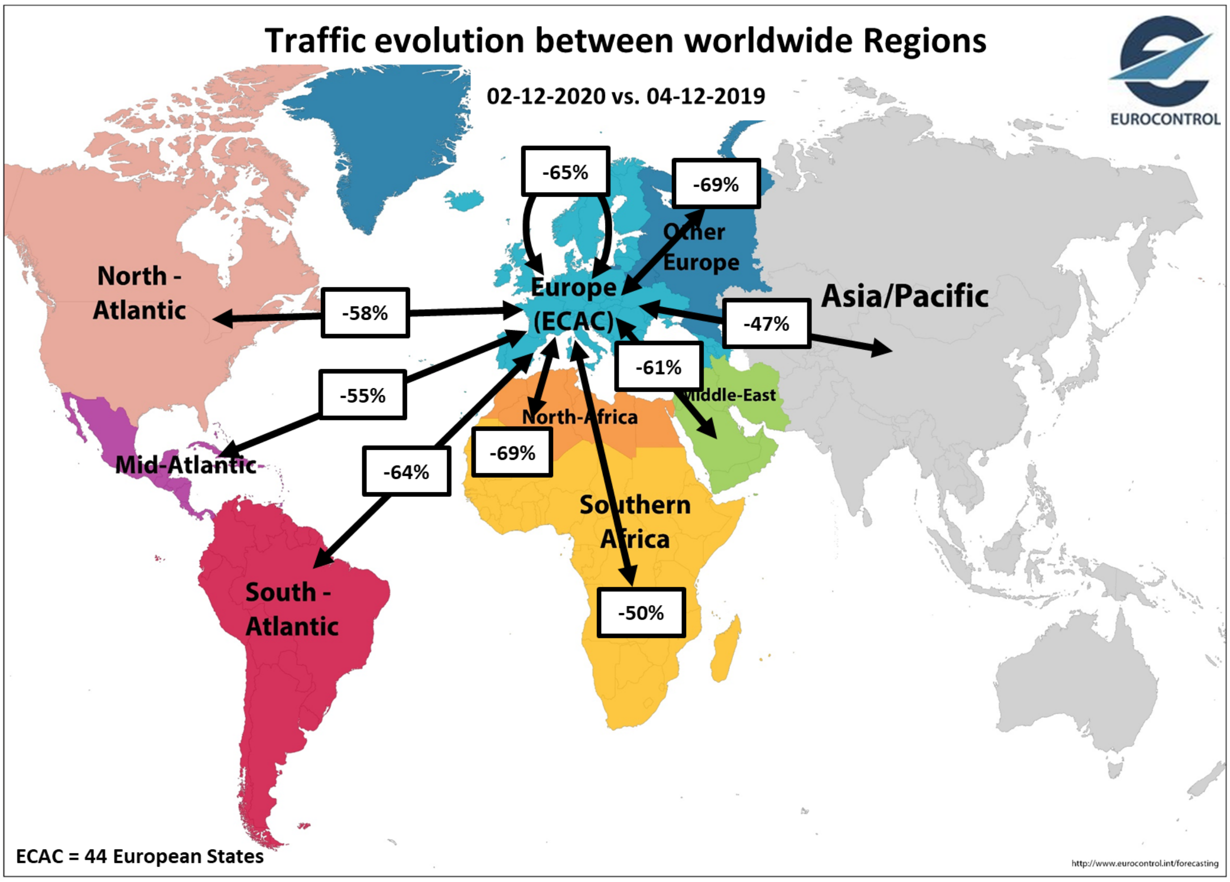
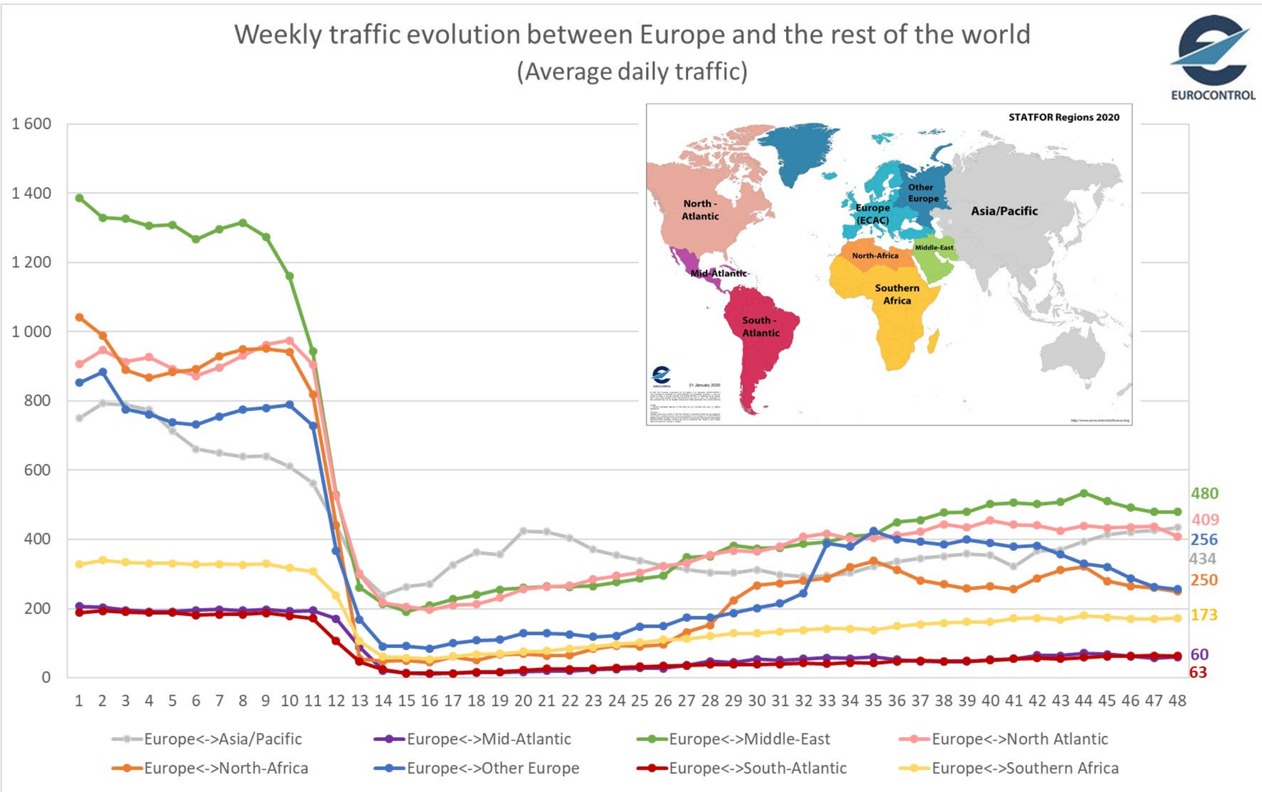
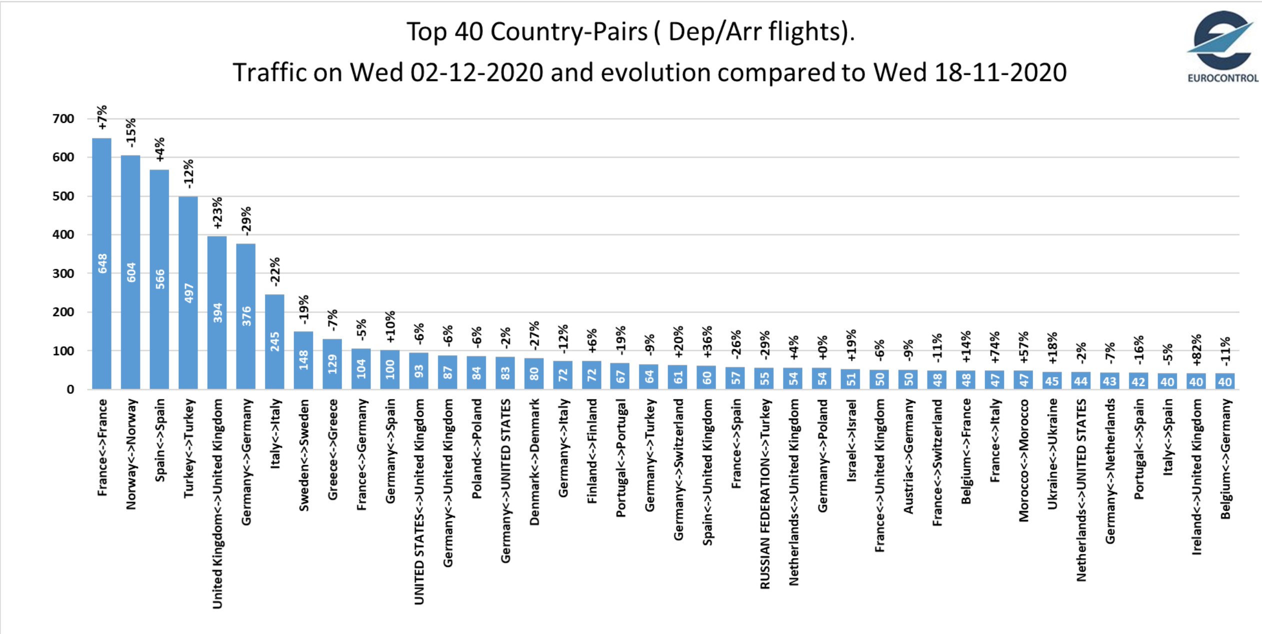
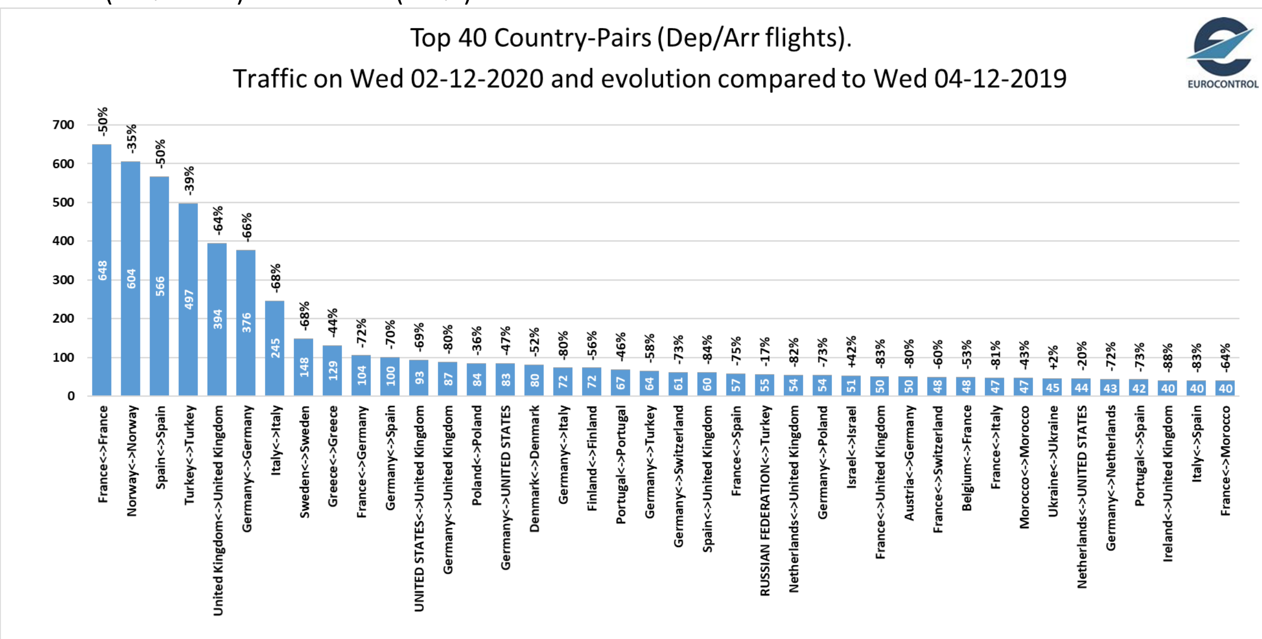




- Domestic flows are the most active flows (i.e. 9 of the top 10 flows are domestic). From the top domestic flows increases were recorded for the UK (+23%), France (+7%) and Spain (+4%) over 2 weeks. All other (main) domestic flows decreased like in Germany (-29%), Denmark (-27%), Italy (-22%), Portugal (-19%), Sweden (-19%), Norway (-15%), Turkey (-12%) and Greece (-7%).
- The busiest non domestic flows were France-Germany (104 flights, -5%), Germany-Spain (100 flights, +10%), US-UK (93 flights, -6%) and Germany-UK (87 flights, -6%).

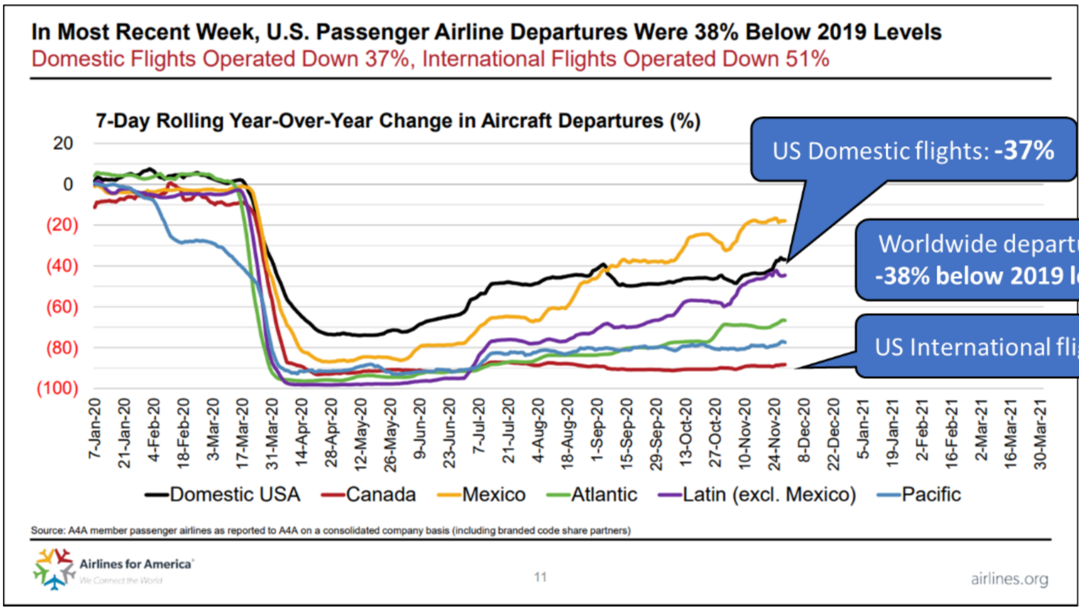


- Compared to 2019, domestic flows within Italy and within Denmark were each -68% on Wednesday 2 December 2020, followed by Germany (-72%), the UK (-64%), Spain and France (-50% each) and Greece (-44%).

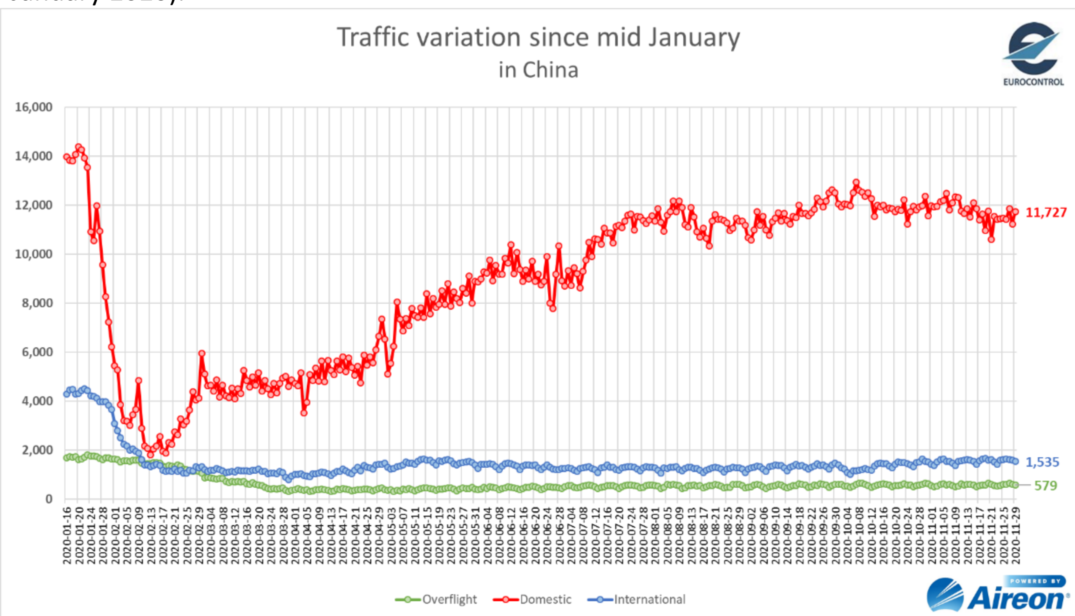


3. Situation outside Europe

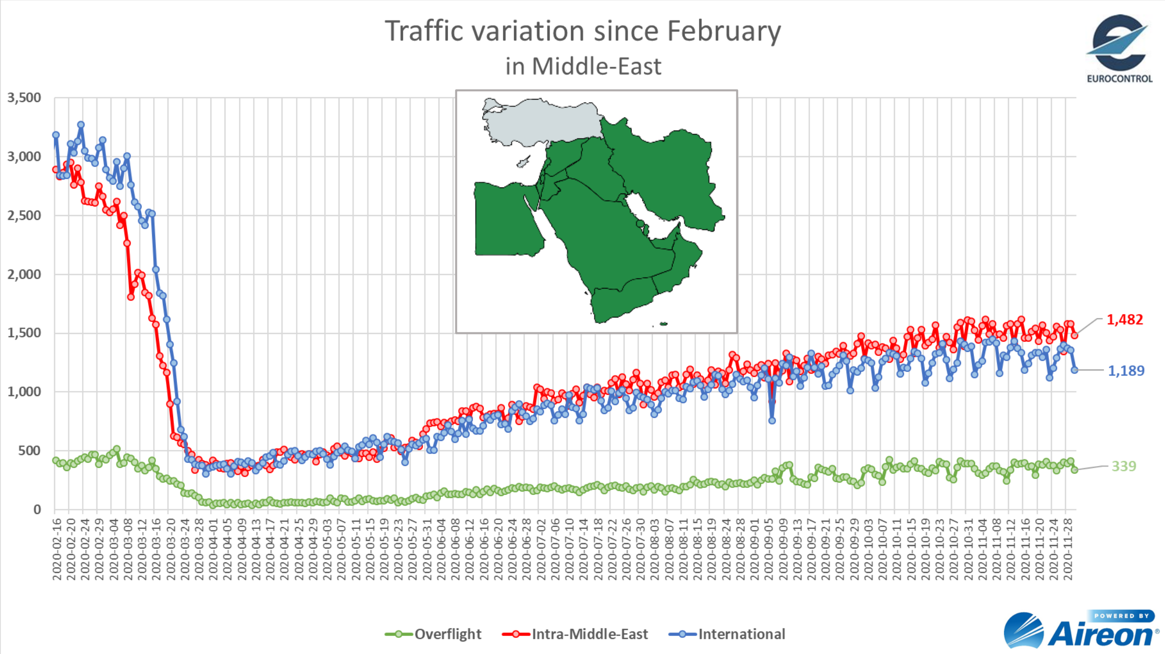
- **United-States (A4A members):**
  - US domestic traffic is stable at -38% (vs 2019) on 30 November. Latin America and Mexican flows continue to increase more than the others over the past week. The latter flows are boosted by beach seekers and VFR.
  - In week ending Nov 20, U.S. airlines passenger volumes were 62% below 2019 levels with Domestic down 61% and International down 69%.
  - The domestic U.S. Load Factor averaged 52% in most recent week, versus 87% a year earlier.



- **China:**
  - Chinese domestic flights are now stable with 11,727 flights (-1% compared to 1st January 2020). International flights have been stable since March with 1,535 flights (-62% compared to 1st January 2020). The same is true for overflights with 579 flights (-64% compared to 1st January 2020).



- **Middle East:**
  - Since the beginning of April, Intra-Middle-East traffic has been increasing slowly reaching 1,482 flights on 30 November (-47% compared to February 2020). Likewise, international traffic has been recovering from early April but remain still slightly below domestic levels with 1,189 flights (-61% compared to February 2020). Overflights have started to increase since the second week of September and remained quite stable in October and November, ending with 339 flights (-21% compared to February 2020).



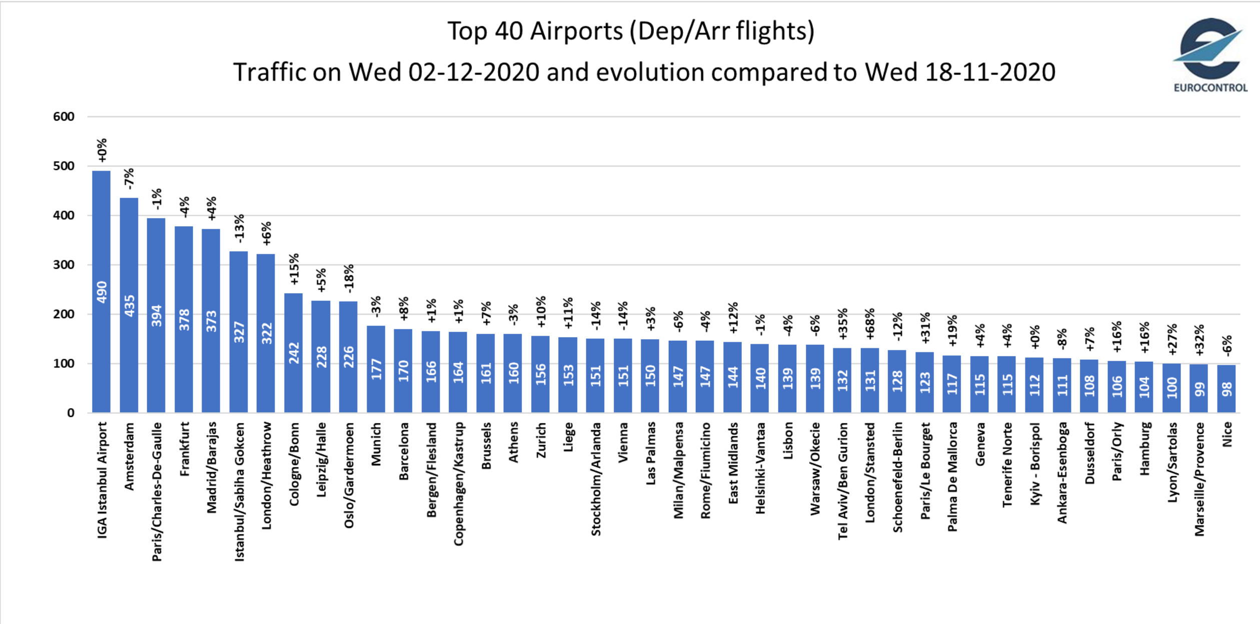
News for worldwide airlines:

- **ANA** plans to operate 1050 international frequencies in December and 963 in January – 19% and 17% of its initial plan.
- **Air Canada** reaches agreement with its pilots to operate cargo aircraft, using converted 767-300ER aircraft.
- **Air India** to commence services to San Francisco (from Bangalore) and Chicago (from Hyderabad) in January and to add its ninth route to London, from Chennai.
- **Aeroflot** domestic pax numbers down 43% in October, international down 87%.
- **Emirates** expecting a “rapid return to cash positivity” from H2 2021. The airline resumed scheduled Airbus A380 services to Manchester on 2 December.
- **Qatar Airways** plans to resume three-weekly flights to Tokyo Haneda, Japan from 11 December 2020.

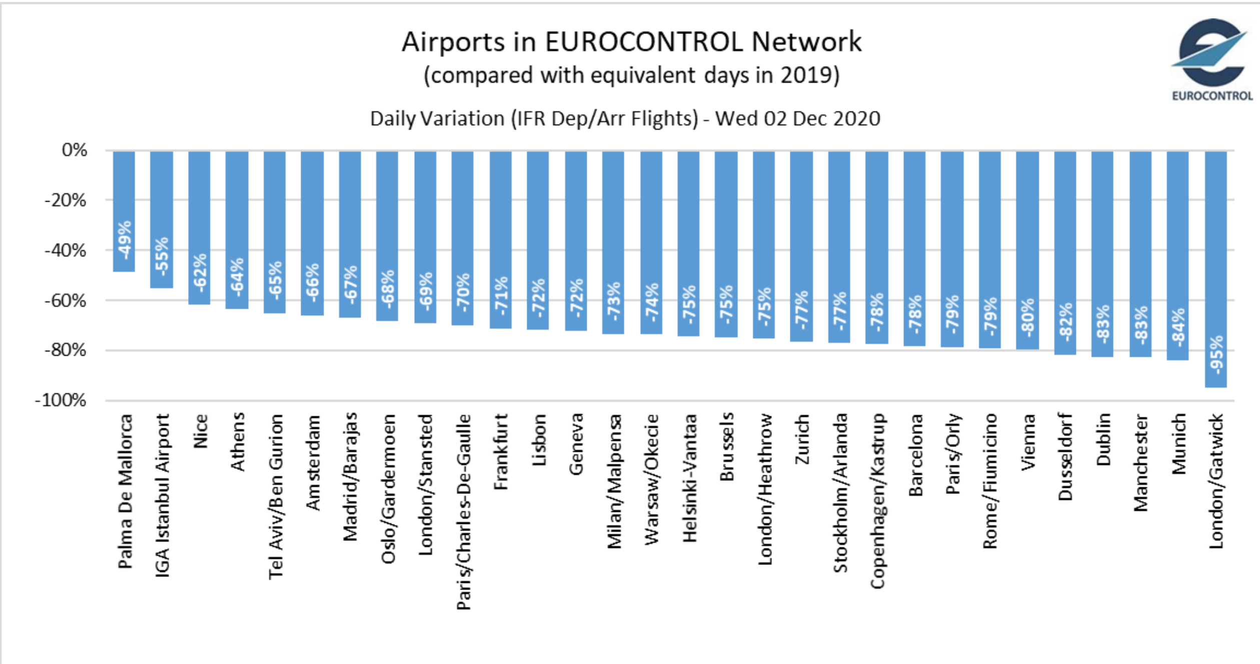
4. Airport Information

- İGA Istanbul Airport was the busiest airport with 490 Dep/Arr flights on 2 December (stable over the last 2 weeks) followed by Amsterdam (435, -7%), Paris CdG (394, -1%), Frankfurt (378, -4%), Madrid (373, +4%), Istanbul/Sabiha (327, -13%), London/Heathrow (322, +6%) and Cologne (242, +15%).

- From the top 10 airports, Cologne (+15%), London/Heathrow (+6%), Leipzig (+5%) and Madrid Barajas (+4%) showed an increase over 2 weeks. İGA Istanbul Airport remained stable (0%). All other airports reported a decrease with Oslo (-18%), Istanbul/Sabiha (-13%), Amsterdam (-7%), Frankfurt (-4%) and Paris CdG (-1%).
- The biggest increases were recorded at London Stansted (131 flights, +68%), Tel Aviv Ben Gurion (132, +35%), Marseille (99, +32%) and Paris Le Bourget (123, +31%). At the other end of the scale, biggest decreases were recorded at Stavanger (89,-37%), Trondheim (96, -21%), Antalya (90, -20%) and Oslo (226, -18%).



- Compared to 2019, Palma de Mallorca operated at -49% on 2 December, İGA Istanbul Airport (-55%), Nice (-62%), Athens (-64%), Tel Aviv (-65%), Amsterdam (-66%), Madrid Barajas (-67%), Oslo (-68%), London Stansted (-69%) and Paris CdG (-70%).

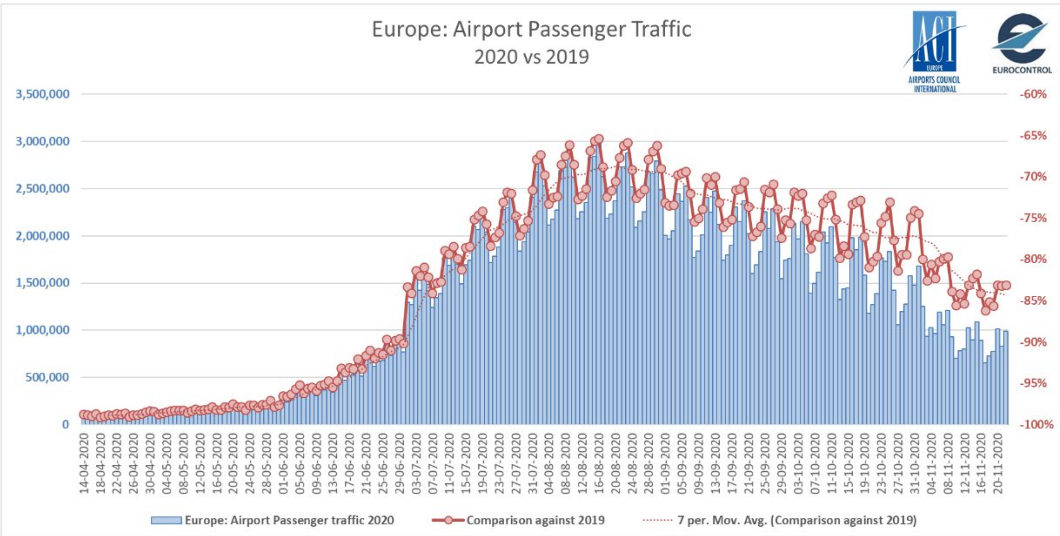


News from European and worldwide airports:

- **Aeroporti di Roma** issues a €300 million green bond.
- **Copenhagen Airport** reports traffic as less than 10% of normal levels; 380 employees begin job sharing.
- **Düsseldorf Airport** agrees restructuring programme with its shareholders, aiming to reduce costs by €50 million p.a.
- **Frankfurt Airport** temporarily closing its northwest runway from 14 December as a result of reduced traffic and the need for more parking space.
- **London Gatwick Airport** seeking resumption of slot 'use it or lose it' rules as soon as possible, "preferably next summer, certainly next winter".
- **Paris CDG Airport** closes terminal 2A due to low traffic volumes
- **Tokyo Narita Airport** commences property survey process for extension of its second runway and construction of a third runway.

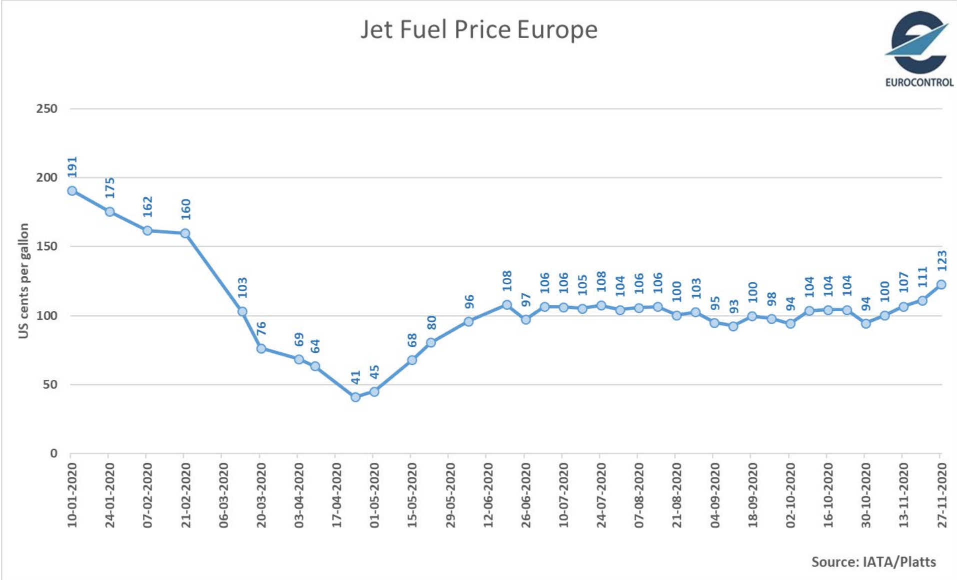
Passengers:

- According to **ACI**, passenger traffic reached its peak levels post-COVID in August with up to 3 million passengers on busiest day (overall -69% in August 2020 vs August 2019). Since then, on Sunday 22 November, ACI reported .0.99 million passengers compared to 5.9 million on Sunday 24 November 2019 (i.e. -83%). Overall, since January 2020, European airports experienced a loss of 1.5 billion passengers compared to 2019 (-80%).



5. Other factors

- **Fuel Price:** Over the 3rd quarter, jet fuel price remained globally stable. Prices have started to rise again in November, closing at 123 cts/gal on Friday 27 November, but they remain 33% lower compared with a year ago.



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.