COVID19 Impact on European Air Traffic
EUROCONTROL Comprehensive Assessment

EUROCONTROL

Thursday, 10 December 2020 - Headlines:

- **10,011 flights on 9 Dec - Traffic at 37% of 2019**
- **Marginal increase (0.2% compared to 2 weeks ago)**
- **7-day rolling average at -63.5% of 2019**

Traffic Situation & Airlines Recovery

- **10,011 flights on Wednesday 9 December** (**slight increase** with 23 more flights **compared to 2 weeks ago) reaching 37%** of **2019 levels.** The 7-day moving average was -63.5% compared to 2019, a reduced decline compared to last week: aircraft operators (LCC and some network carriers) started to inject additional capacity for the end-year break.
- **The first days of December** saw a decline of 64% (compared to same period in 2019), below the forecast in 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.
- **Turkish Airlines** was the airline with the highest number of flights with **557** flights on Wed 9 Dec compared to Wed 25 Nov (-52 flights, -9%). **Widerøe** was second busiest (310 flights, -4%, -12 flights) followed by cargo operator **DHL Express** (308 flights, +1%, +3 flight), **KLM** (263 flights, +2%, +4 flights) and **Air France** (261 flights, +11%, +25 flights). Yesterday, **British Airways** ranked **10th, Ryanair 11th** and **easyJet, 36th**.
- Over the past two weeks, a large number of **operators have increased** their **capacity** like easyJet (+38 flights, +200%), Wizzair (+41, +171%), Vueling (+33, +103%), British Airways (+69, +74%) and Netjets (+30, +51%).
- In terms of dep/arr traffic, **Germany** remained the State with the **highest** number of dep/arr flights with 1,679 flights on Wednesday 9 December (-2% over 2 weeks) followed by the **UK** (1,453, +29%), **France** (1,426, +0%), **Spain** (1,072, +12%) and **Turkey** (1,029, -12%). Turkey recorded some declines due to the start of a renewed lockdown.
- **Business Aviation remained stable at** -20% in November (vs. 2019). **All-cargo remains slightly above** 2019 levels (+6%). **Charter flights are steadily recovering** weeks after weeks reaching -17%. Traditional and Low-Cost, severely hit by the renewed lockdown and restrictions (2nd wave) are lagging behind at -71% and -83% respectively.

Traffic Flows & Country Pairs

- **The intra-Europe flow is the main flow** with 7,324 flights on 9 Dec (+1% over 2 weeks). Intra-Europe flights are at -65% compared to 2019 while all other flows are at -57%.
- **Top** traffic **flow** with **Europe** remains **"Middle-East"** (504 flights, -6%) but **"North-Atlantic"** (455 flights, +13%) outpaced **"Asia/Pacific"** (445 flights, +3%) as some operators increased their capacities to the U.S.
- Intra-Europe flights are at -65% compared to 2019 while all other flows are at -57%.
- The situation is quite mixed for domestic flows with some increasing over 2 weeks: a few of them increasing like in **Spain (+8%)**, **the UK (+19%)** and **Italy (+31%)** All other (main) domestic flows decreased with biggest declines for **Denmark (-33%)**, **Poland (-29%)**, **Turkey (-18%)**, **Germany (-18%)** and **Sweden (-18%)**.

Airports

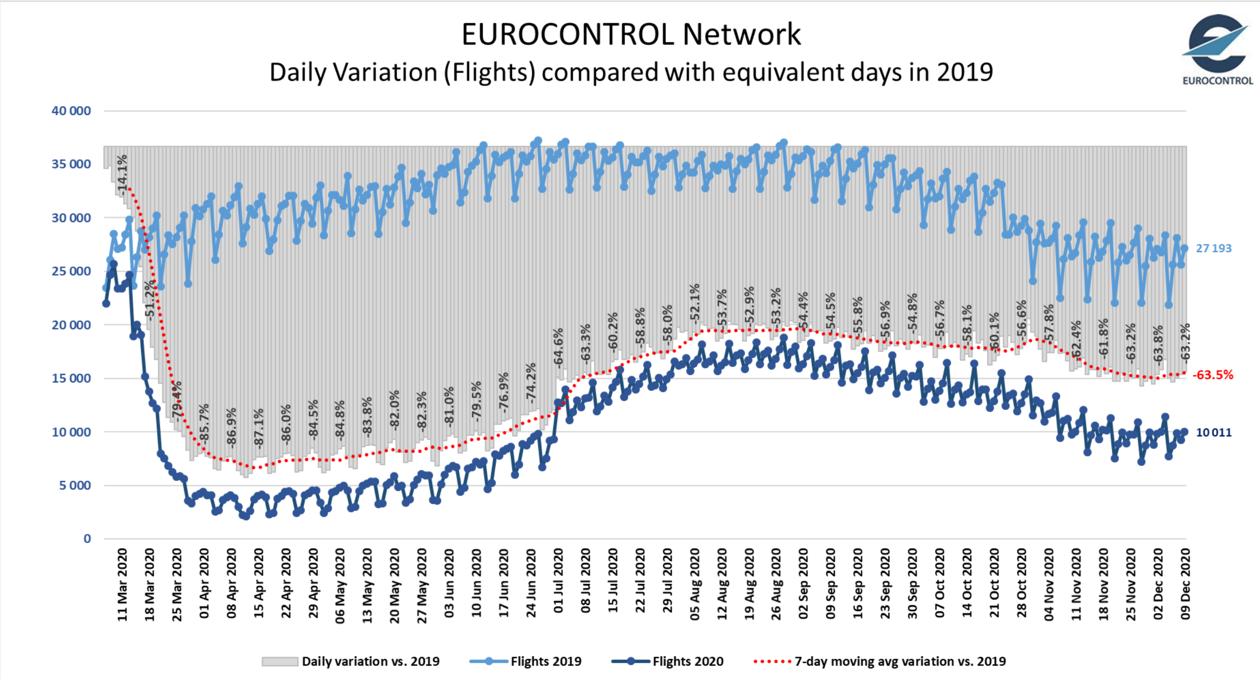
- **İGA Istanbul Airport was the busiest airport** with 466 flights on 9 Dec (despite renewed lockdown in Turkey) followed by **Amsterdam** (455, +7% on 25 Nov), **London/Heathrow** (419, +33%) Paris CdG (409, 0%), **Frankfurt** (379, +6%), **Madrid** (379, +15%), **Istanbul/Sabiha** (296, -18%), **Leipzig** (250, +16%) and **Cologne** (247, +3%).
- From the top 10 airports, **most airports** showed an **increase** over 2 weeks: **London/Heathrow** (+33%), **Leipzig** (+16%), **Madrid Barajas** (+15%), **Amsterdam** (+7%), **Frankfurt** (+6%) and **Cologne** (+3%). **Paris CdG** remained **stable**. Airports reporting a **decrease** included **Istanbul/Sabiha** (-18%), **Oslo** (-10%) and **İGA Istanbul** (-8%).

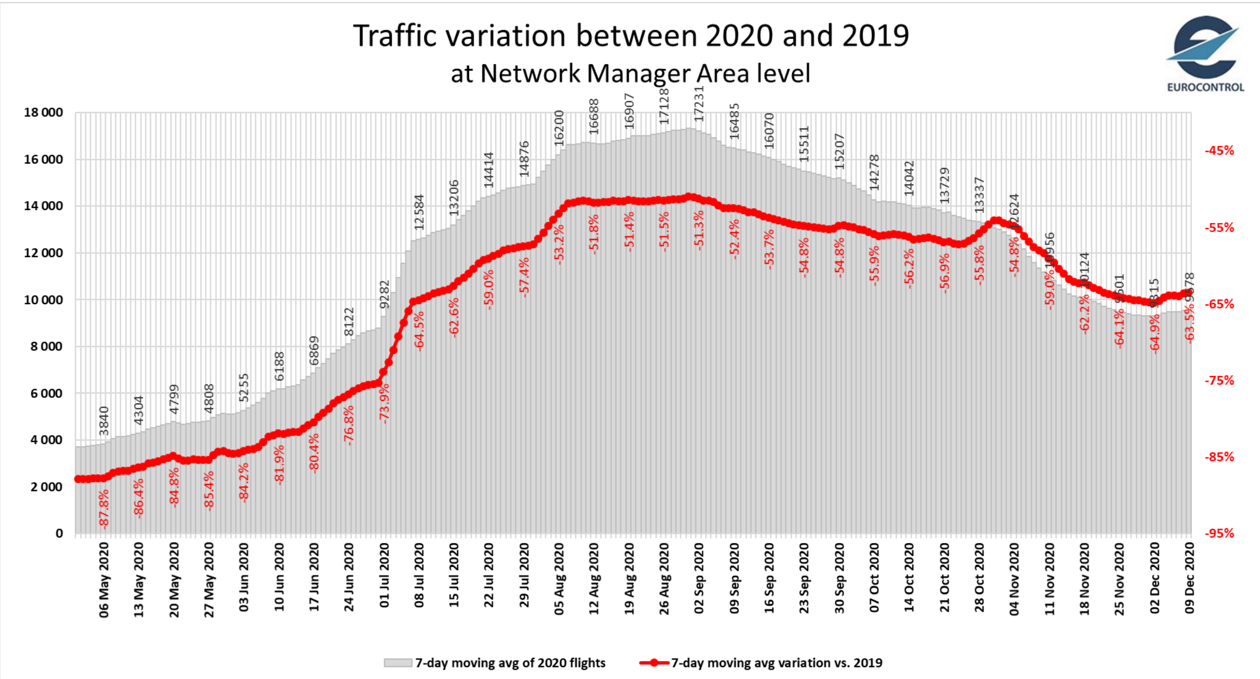
Other

- **Fuel price:** The fuel price slightly increased in early December to 125 cts/gal (but still 33% below prices for same date in 2019).

1. Traffic Situation and Airlines Recovery

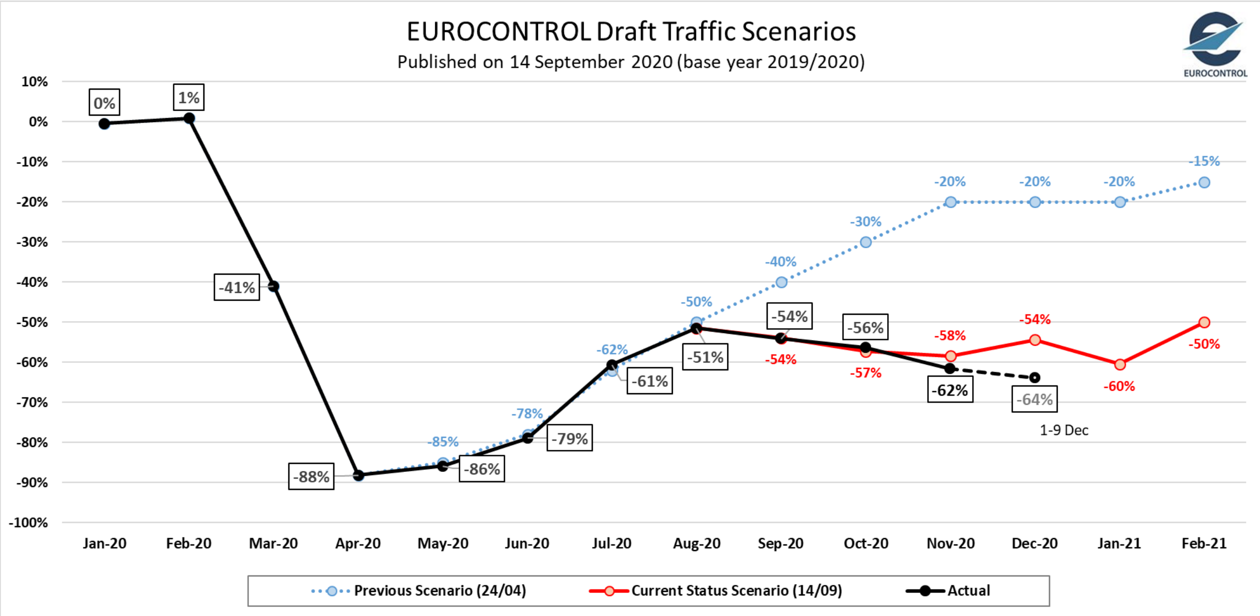
- The network recorded 10,011 flights on Wednesday 9 December (+0.2% with +23 flights compared to Wednesday 25 November). This is 36.8% of 2019 traffic levels. Based on a 7-day moving average, the decrease is -63.5% compared to 2019 and has bottomed out last week. Indeed, the rate of the decrease on a weekly basis is now slightly higher than a week ago.





Overall situation against EUROCONTROL traffic scenarios:

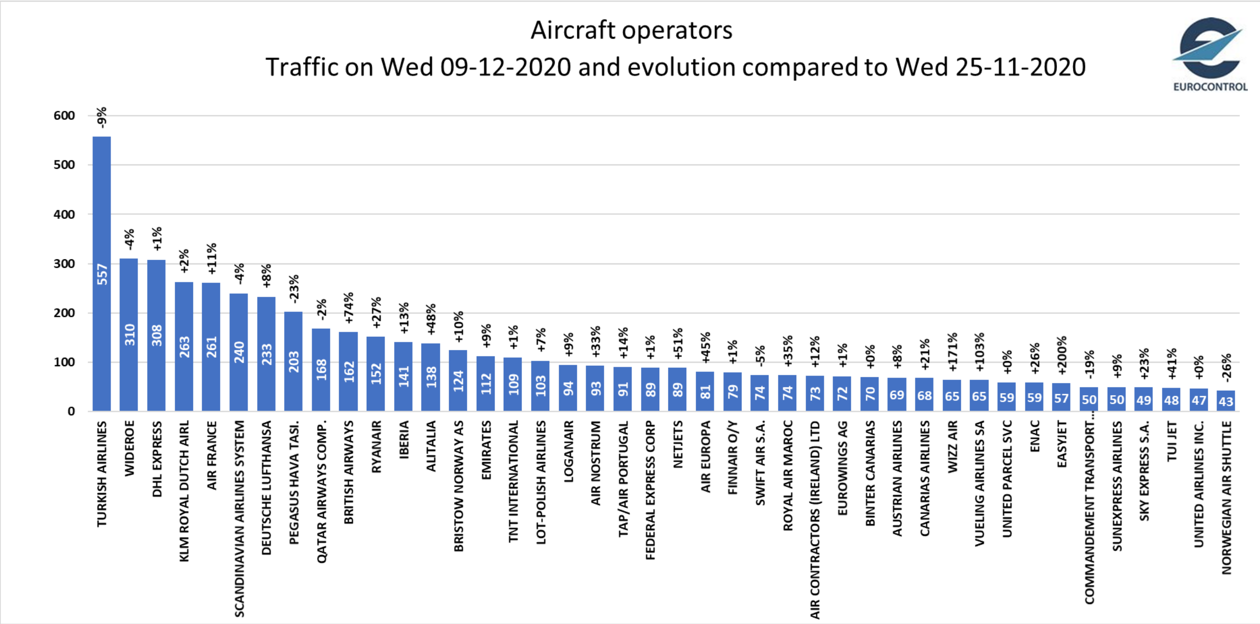
- **First days of December flights averaged -64% compared to same period in 2019**, hence below the scenarios, due to the renewed lockdown across many European countries. This is slightly higher than a week ago, and traffic is expected to rise again from the second half of the month the with end-of-the-year break.



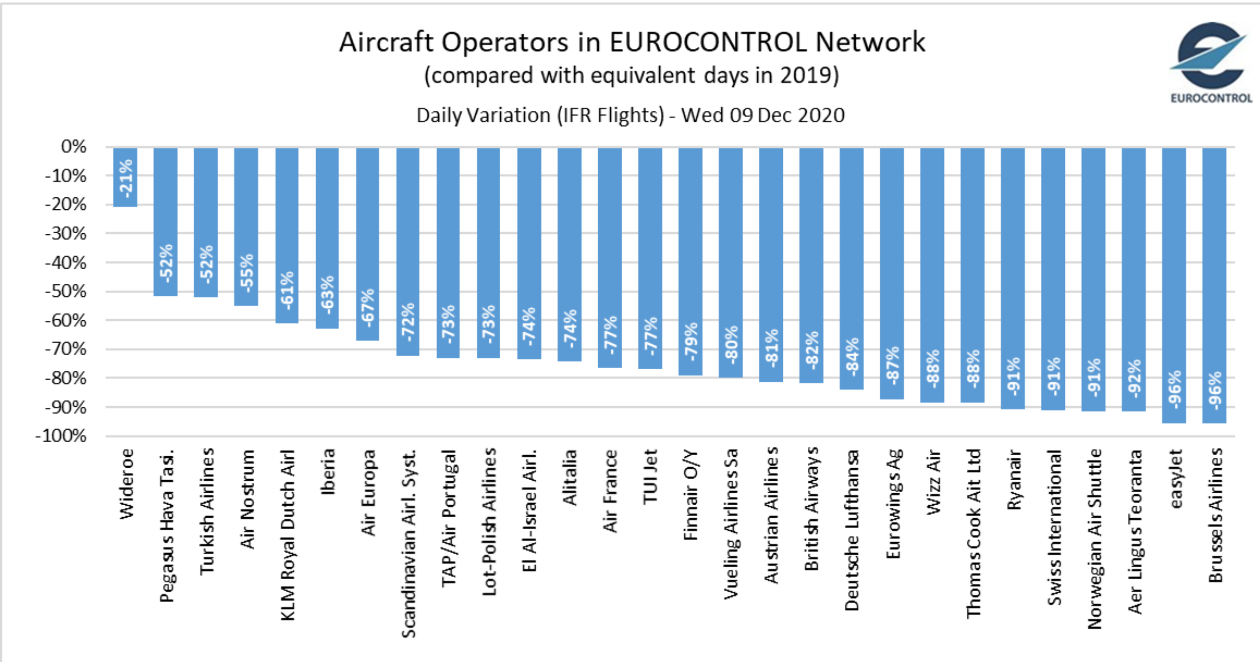
European Airlines:

Main changes from last week report are: a generalised increase in capacity from LCC carriers (easyJet, Wizzair, Vueling, Ryanair,…) and also from network carriers (British Airways, Alitalia, Royal Air Maroc…). Conversely, Turkish aircraft operators have reduced their capacities due to the application of enforced lockdown measures.

- **Turkish Airlines** was the airline with the highest number of flights with 557 flights on Wednesday 9 December decreasing by 9% compared to Wednesday 25 November (-52 flights), followed by **Widerøe** (310 flights, -4%, -12 flights), **DHL** express (308 flights, +1%, +3 flight), **KLM** (263 flights, +2%, +4 flights), **Air France** (261 flights, +11%,+25 flights), **SAS** (240 flights, -4%, -11 flights), **Lufthansa** (233 flights, +8%, 17 flights), **Pegasus** (203 flights, -23%, -62 flights), **Qatar Airways** (168 flights, -2%, -3 flights), **British Airways** (162 flights, +73%, +69 flights). **Yesterday, Ryanair was ranked 11th (with 152 flights, up 27%) and easyJet 36th (with 57 flights, up 200%).**
- Compared to two weeks ago, a large number of **airlines increased** their **capacity** like easyJet (+38 flights, +200%), Wizzair (+41 flights, +171%), Vueling (+33 flights, +103%), British Airways (+69 flights, +74%) and Netjets (+30 flights, +51%).
- Largest **capacity decreases** in percentage terms were recorded for: Pegasus (-62 flights, -23%) and Turkish Airlines (-52 flights, -9%) as the effect of the Turkish lockdown (evenings and week-ends) have a strong impact on domestic flows. Northern Europe airlines recorded declines too: Norwegian (-15 flights, -26%), SAS (1 flights, -4%) and Widerøe (-12 flights, -4%).



- Compared to 2019, Widerøe operated at -23% on Wednesday 9 December followed by Pegasus (-52%), Turkish Airlines (-55%), Air Nostrum (-55%), KLM (-61%), Iberia (-63%), Air Europa (-67%), SAS (-72%), TAP (-73%), LOT (-73%) and El Al (-74%).



News from key European airlines:

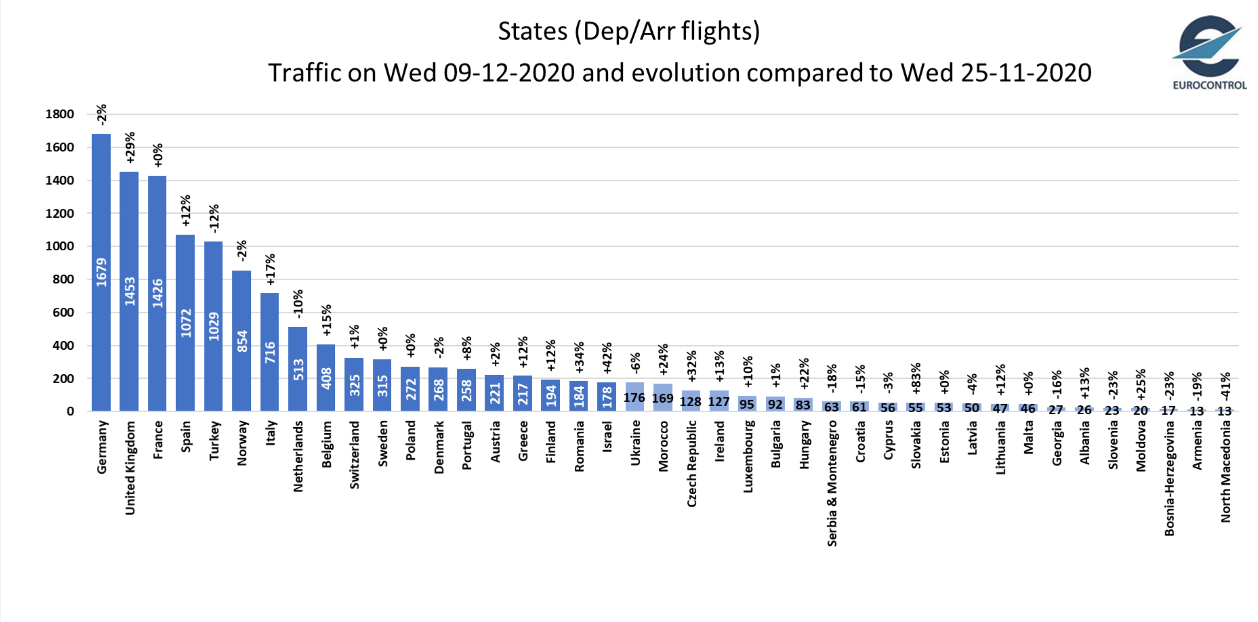
- **Aegean Airlines** to operate Heraklion-Vienna/Geneva/Berlin services as from May.
- **airBaltic** reports €121M operating loss in first 9 months of 2020; passengers down 88% in November; says funds could run out by 09/21 if situation doesn't improve.

- **Air France** plans to resume use of 32 aircraft as of December; French government plans to invest up to €5Bn in the airline by spring; to restart daily Pointe-à-Pitre services from 17/12.
- **Air France-KLM Martinair Cargo** launches sustainable fuel programme setting up a book-and-claim system for SAF.
- **Alitalia** to require passengers to show negative COVID test for flights from Rome to New York, test must be made prior 48h before travelling, arrivals from New York to Rome to be required to undertake a second antigen test upon arrival and will be exempt from two weeks quarantine.
- Government confirms plans to support **Air Serbia**.
- **British Airways** cargo staff vote for strike action over plans to dismiss and rehire.
- **Corsair** to get a loan of €80M from French government.
- **Eurowings** suspends plans to operate Cologne-Split in December and January; to launch Munich to Larnaca, Preveza, Tirana in H1 2021, and Berlin-Heraklion in March.
- **Finnair** passengers down 92.2% in November; offering virtual reality flights to Lapland on 25/12.
- **HOP!** to transition to an all Embraer fleet.
- **Iberia** resumes Madrid-Rio de Janeiro Service.
- **KLM** to increase frequency of Amsterdam-Zagreb to 2x a day from February; to start with Delta COVID- tested flights from Atlanta to Amsterdam from mid-December.
- **Lufthansa** plans to increase frequencies from Frankfurt/Munich to Menorca, Tenerife, Gran Canaria, Madeira, Malta, Larnaca & Faro and to resume several other European service.s
- **Montenegro Airlines** to resume services to Paris, Ljubljana, increase frequencies to Frankfurt, Vienna and Zurich as of mid-December.
- **Norwegian** announces refinancing plans, including €376M in new equity.
- **Ryanair Group** pax down 82% year-on-year in November; launches new base at Paris-Beauvais; orders 75 more 737 MAX (increasing its orders from 135 to 210); launches new base at Venice Treviso from March.
- **SAS** completes a recapitalisation adding SEK12 billion (approx. €1.2Bn) in liquidity and SEK14.25 billion in strengthened equity; retired its last A340-300 aircraft; in the process of renewing its fleet with A350-900s.
- **TAP Air Portugal** reduced labour costs by 49% in Q3 2020; revenue down 81%.
- **TUI Group** reaches agreement with investors, banks and the German Government on a financial package of €1.8Bn.
- **Virgin Atlantic** to resume services from Manchester.
- **Wizz Air** pax down 85% year-on-year in November, with a load factor of 68%; expands domestic Norway network from 12 routes to 15; plans to launch new base at Cardiff; offering charter services for up to 239 passengers; to launch scheduled Skopje-Abu Dhabi service; relaunching 22 services to Ukraine from December.

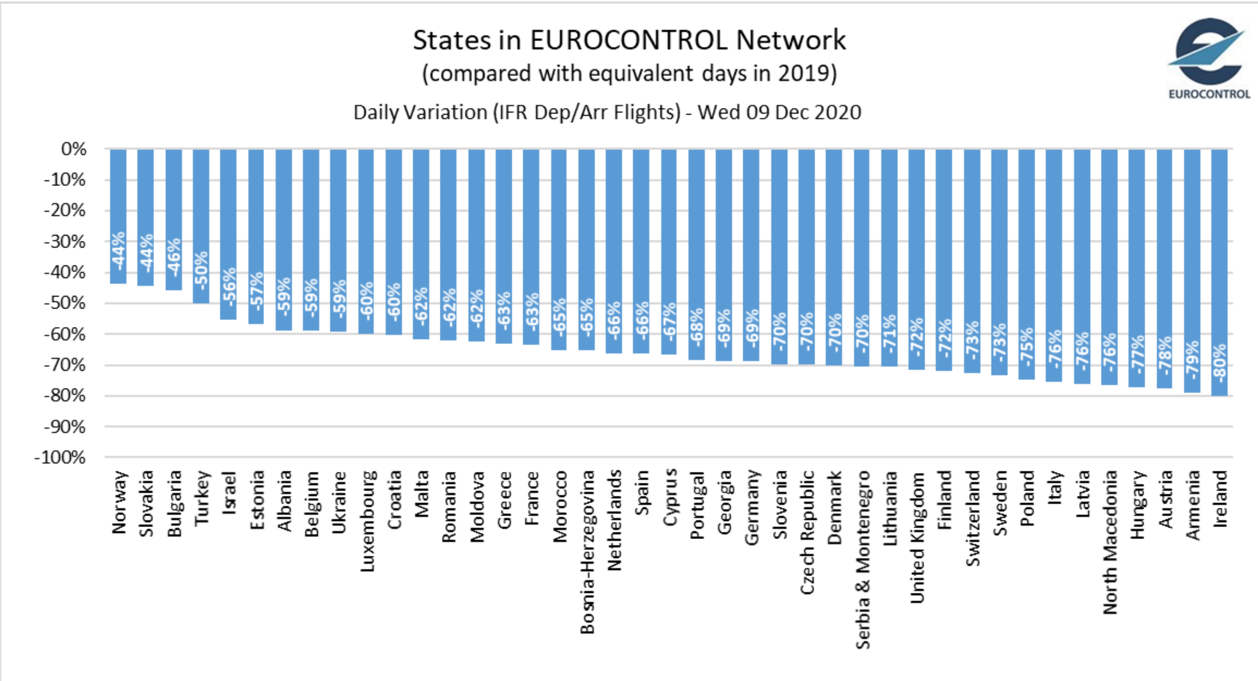
States

- 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 1,679 flights on Wednesday 9 December (-2% over 2 weeks) followed by the UK (1,453, +29%), France (1,426, +0%), Spain (1,072, +12%), Turkey (1,029, -12%), Norway (854, -2%), Italy (716, +17%) and the Netherlands (513, -10%).

[1] excluding overflights.

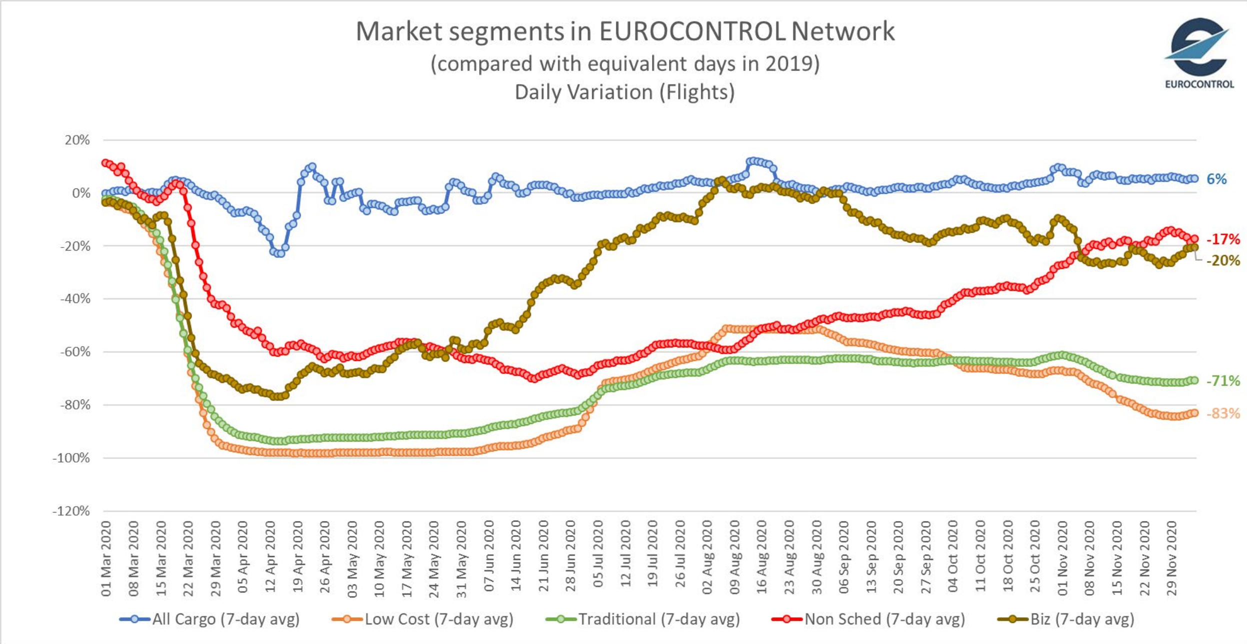


- Compared to 2019, Departure/Arrival traffic on Wednesday 9 December for these top 8 States was: Norway (-44%), Turkey (-50%), France (-63%), the Netherlands (-66%), Spain (-66%), the UK (-72%), Italy (-76%) and Germany (-79%).



Market Segments:

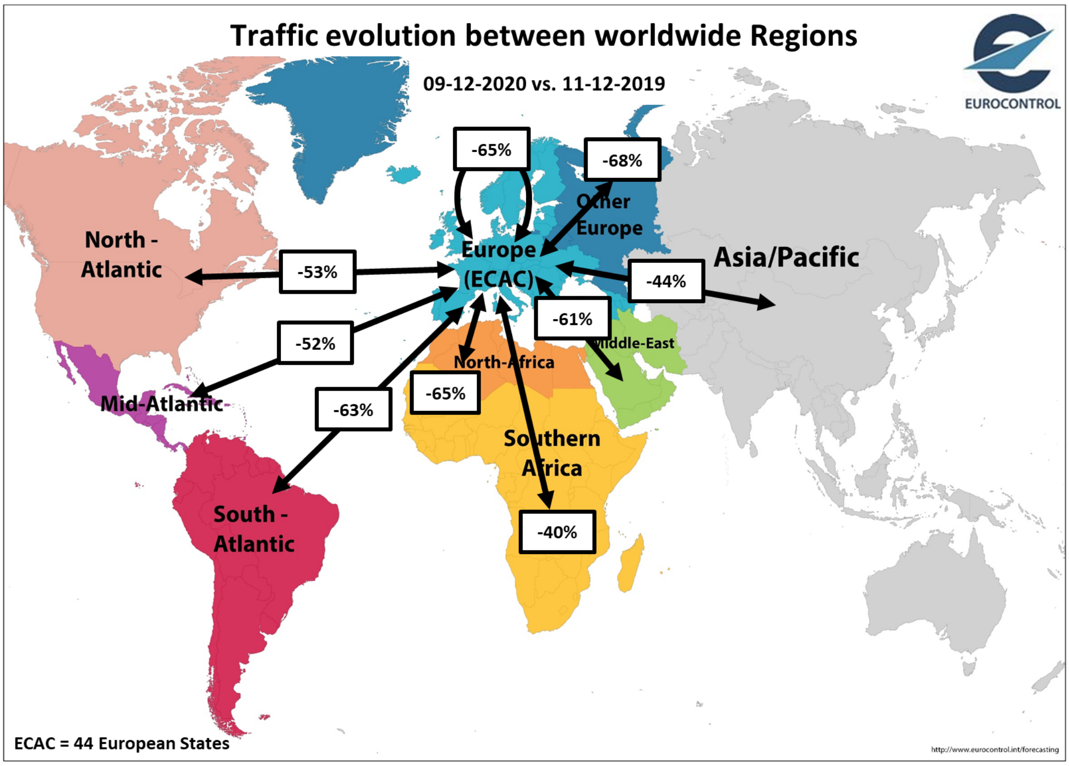
- Early December, **All-cargo** remains 6% above 2019 levels. **Charter** flights are steadily recovering but still 17% below 2019 levels. **Business Aviation** recorded a quick upturn end May which was confirmed by a recovery to 2019 levels at the end of the summer. The segment started to decline again from September and it is now 20% below 2019 levels. **Low-Cost** and **Traditional** segments, were severely affected by the new lockdown measures from the end of October, bottoming out at the end of November and are respectively recording -83% and -71% declines (vs 2019).

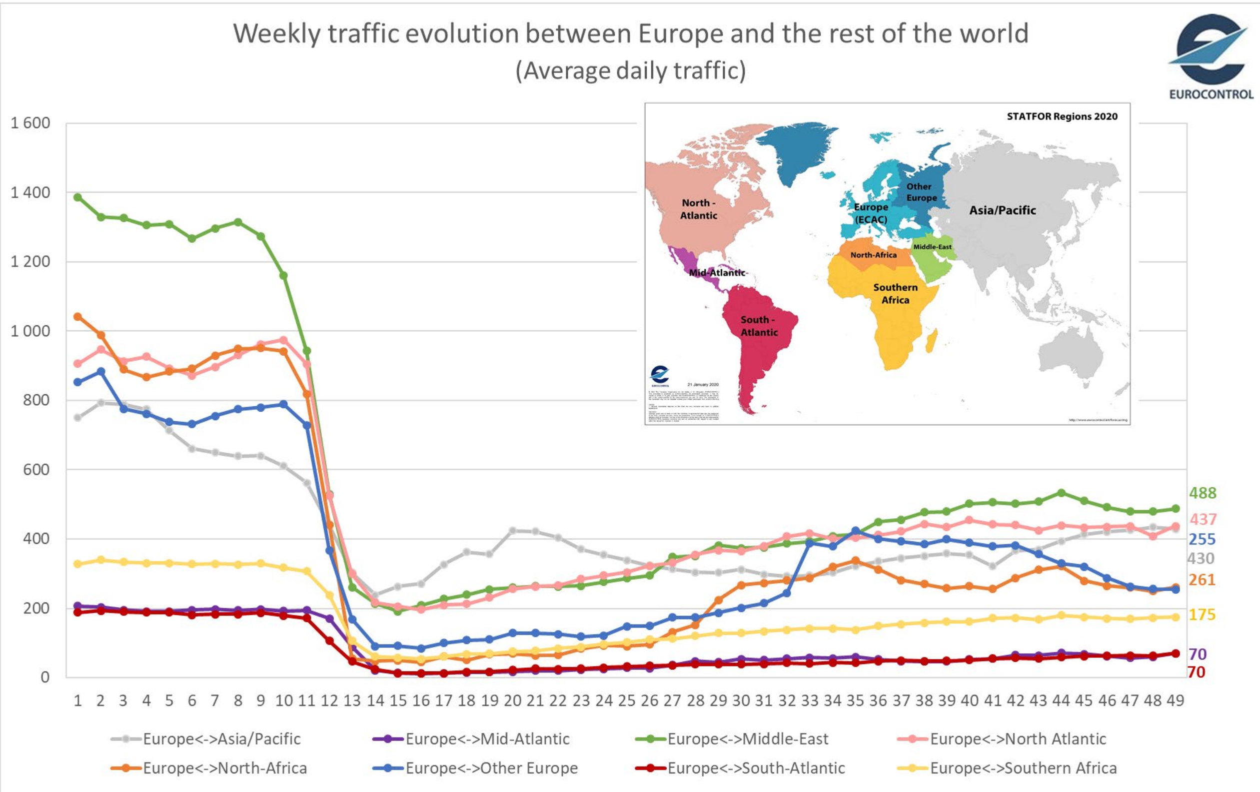


2. Traffic Flows & Country Pairs

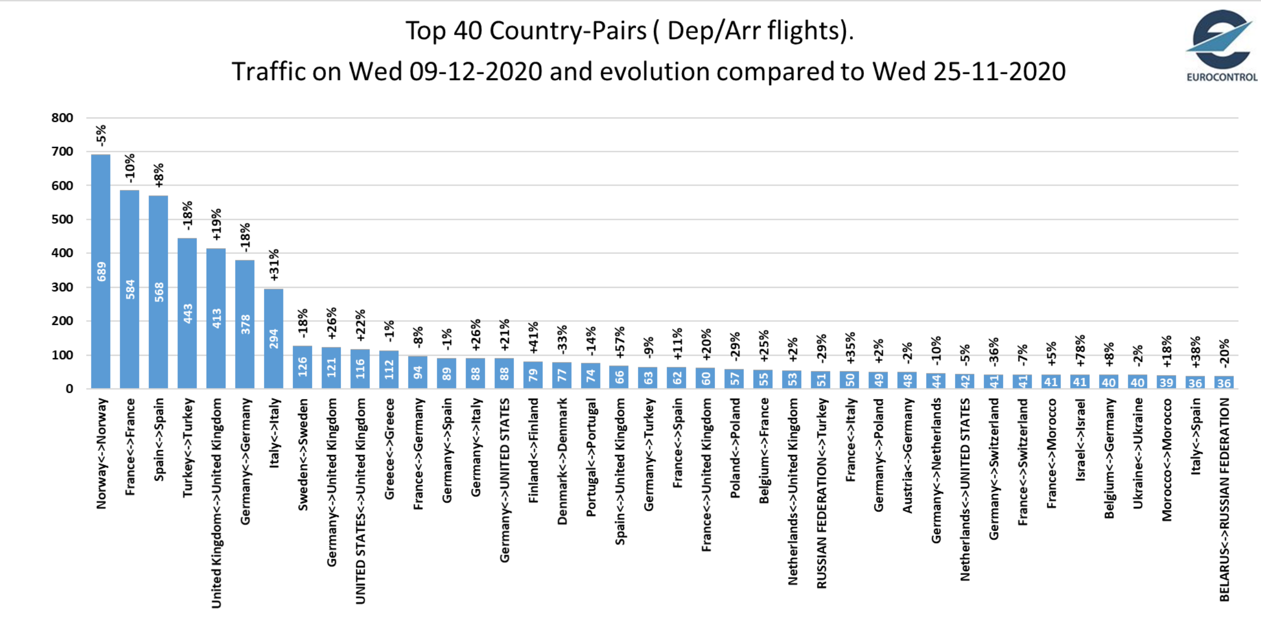
- The **main** traffic **flow** is the **intra-Europe** flow with **7,324 flights** on Wednesday 9 December, which **is slightly increasing** (+1%) over 2 weeks.
- The **top** traffic **flows** with **Europe** were with **"Middle-East"** (504 flights, -6%) followed by **"North-Atlantic"** (455 flights, +13% as some aircraft operators increased their capacities to U.S.) outpacing **"Asia/Pacific"** (445 flights, +3%). The fourth busiest partner was **"North-Africa"** (270 flights, +17%: a solid increase owing to capacity increases to/from Egypt, Morocco and Tunisia) and **"Other Europe"** (244 flights, -9%).
- Intra-Europe flights are at -65% compared to 2019 while intercontinental flows are at -57%.

REGION	25-11-2020	09-12-2020	%	vs. 2019
Intra-Europe	**7 233**	**7 324**	***+1%***	***-65%***
Europe<->Asia/Pacific	434	445	*+3%*	*-44%*
Europe<->Mid-Atlantic	53	79	*+49%*	*-52%*
Europe<->Middle-East	536	504	*-6%*	*-61%*
Europe<->North Atlantic	404	455	*+13%*	*-53%*
Europe<->North-Africa	230	270	*+17%*	*-65%*
Europe<->Other Europe	269	244	*-9%*	*-68%*
Europe<->South-Atlantic	60	65	*+8%*	*-63%*
Europe<->Southern Africa	162	195	*+20%*	*-40%*
Non Intra-Europe	**2 148**	**2 257**	***+5%***	***-57%***

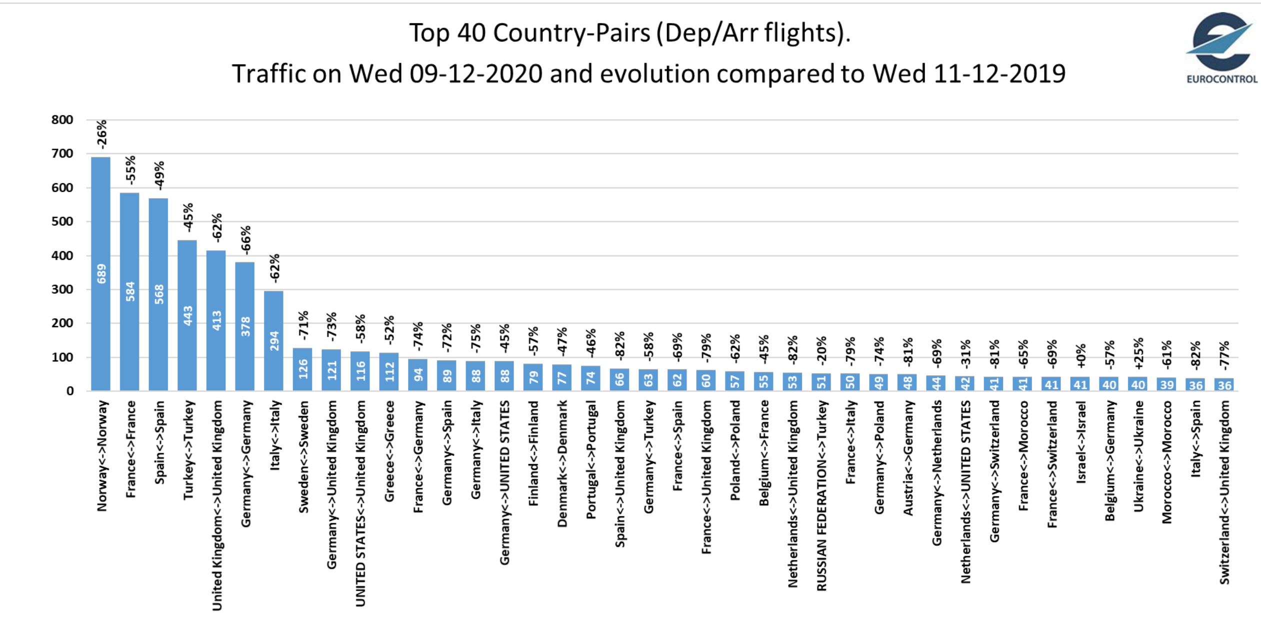

Traffic evolution between worldwide Regions
09-12-2020 vs. 11-12-2019
EUROCONTROL
North - Atlantic
Mid-Atlantic
South - Atlantic
Europe (ECAC)
Other Europe
North-Africa
Southern Africa
Middle-East
Asia/Pacific
-65%
-68%
-53%
-44%
-52%
-61%
-65%
-63%
-40%
ECAC = 44 European States
http://www.eurocontrol.int/forecasting


Weekly traffic evolution between Europe and the rest of the world
(Average daily traffic)
EUROCONTROL
1 600
1 400
1 200
1 000
800
600
400
200
0
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49
488
437
255
430
261
175
70
70
STATFOR Regions 2020
North - Atlantic
Other Europe
Europe (ECAC)
Asia/Pacific
North-Africa
Middle-East
Mid-Atlantic
Southern Africa
South - Atlantic
Europe<->Asia/Pacific
Europe<->Mid-Atlantic
Europe<->Middle-East
Europe<->North Atlantic
Europe<->North-Africa
Europe<->Other Europe
Europe<->South-Atlantic
Europe<->Southern Africa

- **Domestic** flows are the **most active** flows (i.e. 8 of the top 10 flows are domestic). From the **top domestic** flows, increases over 2 weeks were recorded for **Spain** (+8%), the **UK** (+19%) thanks to British Airways, easyJet and Ryanair additional capacities, **Italy** (+31%) owing to Alitalia and Ryanair increases. All other (main) domestic flows decreased: **Denmark** (-33%), **Poland** (-29%), **Turkey**, **Germany**, **Sweden** (-18% each), **Portugal** (-14%), **France** (-10%), **Norway** (-5%) and **Greece** (-1%).
- The busiest non domestic flows were **Germany-UK** (121 flights, +26%), **US-UK** (116 flights, +22%), **France-Germany** (94 flights, -8%), **Germany-Spain** (89 flights, -1%) and **Germany-Italy** (88 flights, +26%).

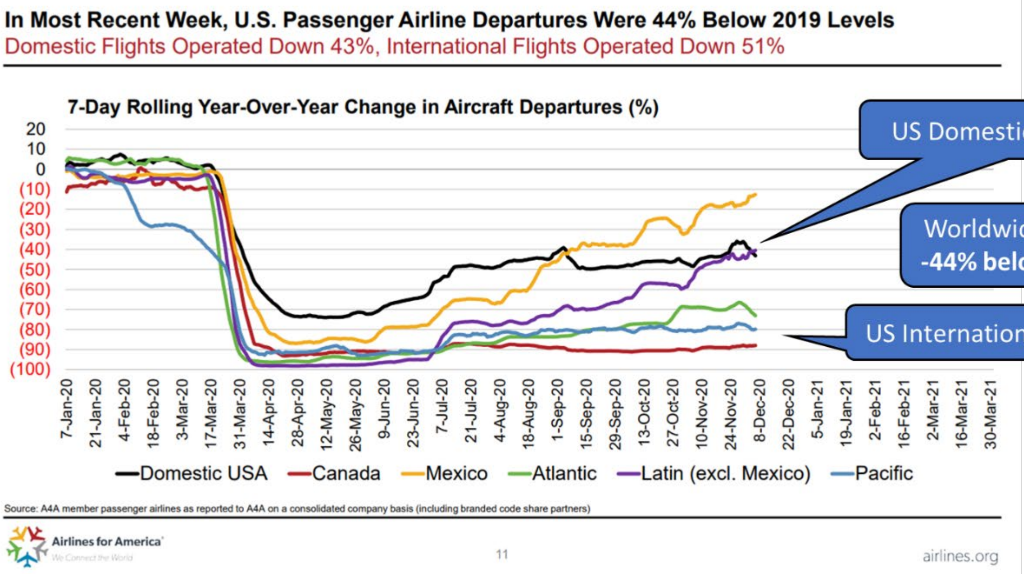


- Compared to 2019, the largest changes in domestic flows on Wednesday 9 December 2020 were recorded within Ukraine (+25%), Norway (-26%), Turkey (-45%), Portugal (-46%), Denmark (-47%), Spain (-49%), Greece (-52%), France (-55%), Finland (-57%), Morocco (-61%), the UK (-62%), Poland (-62%), Italy (-62%), Germany (-66%) and Sweden (-71%).

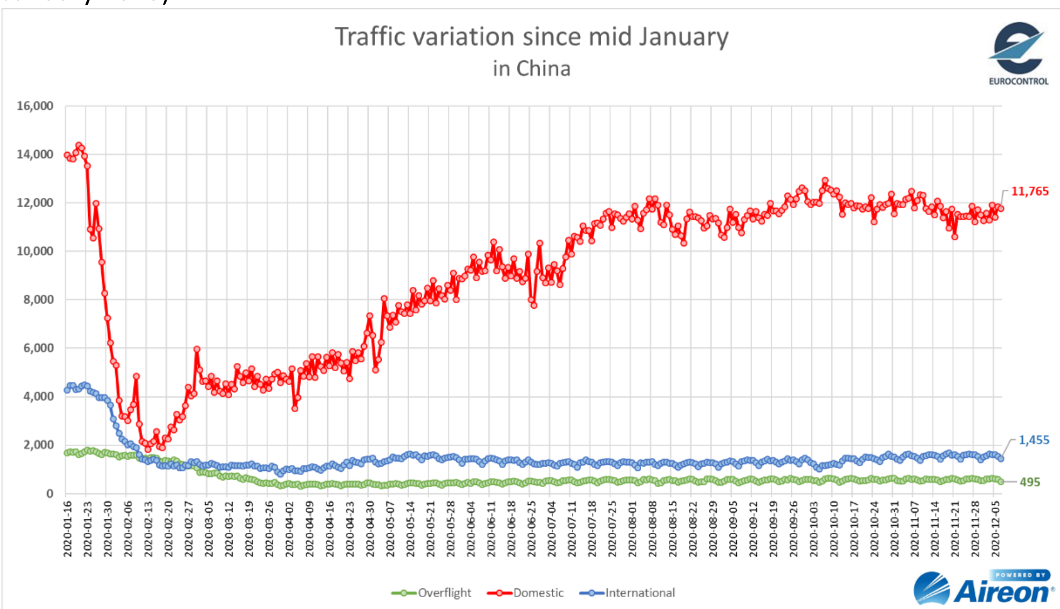


3. Situation outside Europe

- **United-States (A4A members):**
  - Except for the blip related to Thanksgiving, US domestic traffic is stable at -43% (vs 2019) on 8 December. Latin America and Mexican flows continue to increase faster than the other flows over the past weeks. But U.S. (and Mexico) have seen their number of COVID-19 cases surging over the last week. Americans face new restrictions after Thanksgiving.
  - In week ending Dec 8, U.S. airlines passenger volumes were 66% below 2019 levels with Domestic down 66% and International down 69%.
  - The domestic U.S. Load Factor averaged 48.8%% in most recent week, versus 84% a year earlier.

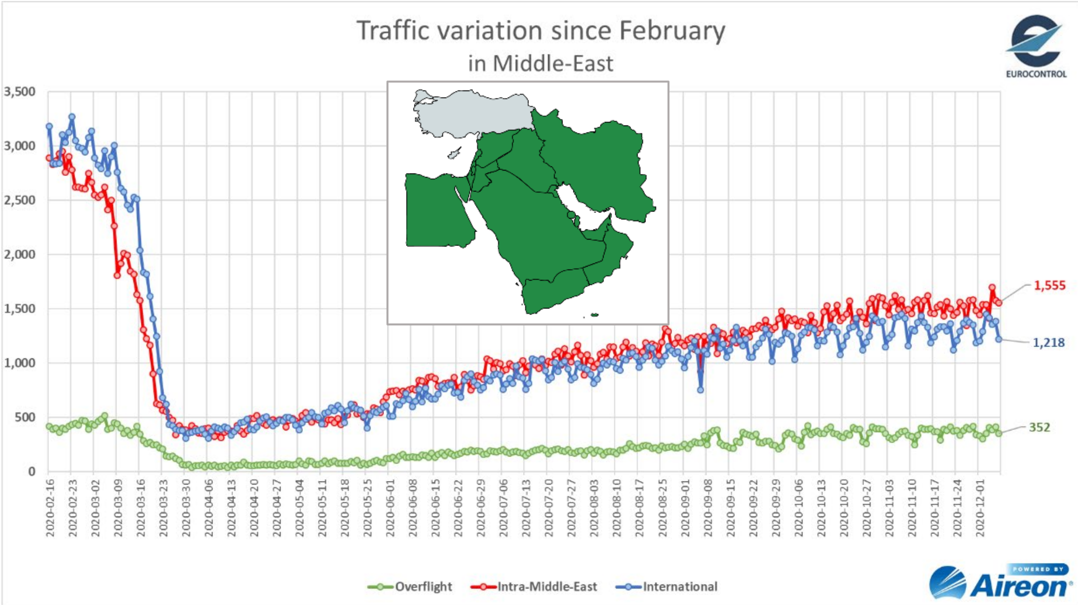


- **China:**
  - Chinese domestic flights remain stable with 11,765 flights (-1% compared to 1st January 2020). International flights have been stable too since March with 1,455 flights (-64% compared to 1st January 2020). The same is true for overflights with 495 flights (-69% compared to 1st January 2020).



- The Chinese passenger load factors averaged at 79.4% in September 2020 compared to 82.2% in September 2019 (source: CAAC).

- **Middle East:**
  - Since the beginning of April, Intra-Middle-East traffic has been increasing slowly reaching 1,555 flights on 7 December (-44% compared to February 2020). Likewise, international traffic has been recovering from early April but remain still slightly below domestic levels with 1,218 flights (-60% 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 352 flights (-18% compared to February 2020).

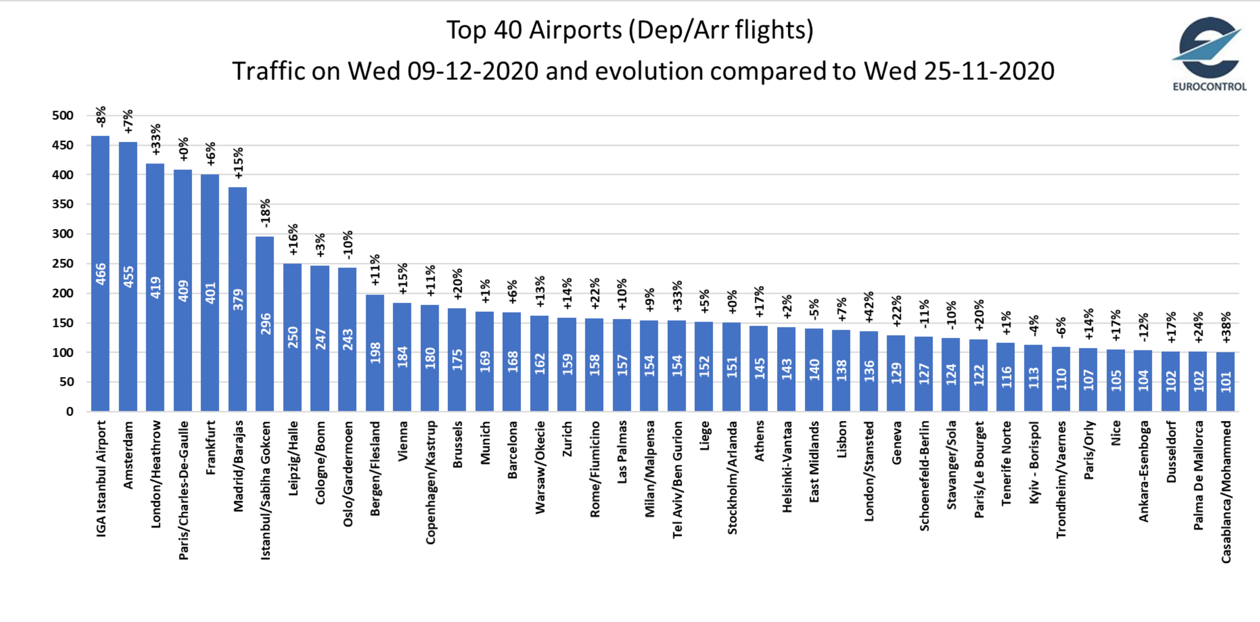


News for worldwide airlines:

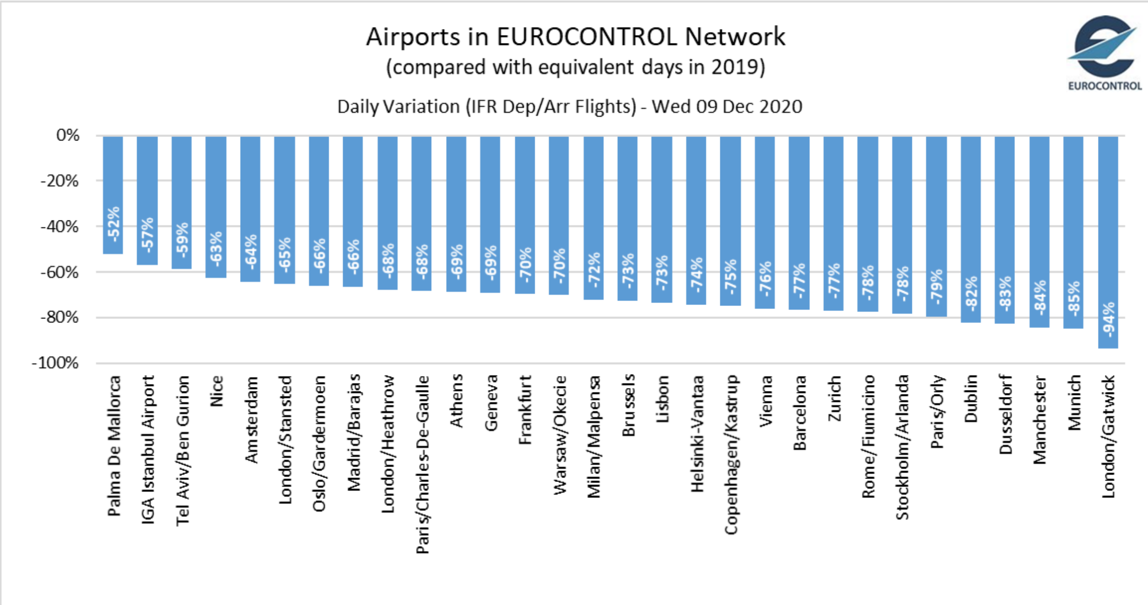
- **Aerolineas Argentinas** postpones relaunch of Buenos Aires-Rome flights.
- **American Airlines** conducts a media flight on the 737 MAX.
- **ANA** SVP comments that the 787 will be a better size for routes to Europe and the US; expects leisure travel to recover quicker.
- **Emirates** announces increase of frequencies to Manchester, London Heathrow and Moscow.
- **Hawaiian Airlines** to cease blocking seats from 15 December.
- **JAL** announces further reductions on domestic flights for December to operations rate of 78%.
- **Qantas Group** domestic capacity in December up to 68% of pre COVID levels, increasing to nearly 80% for Q1 2021; notes that the number of FTEs 'stood up' will increase from 9,000 to 11,500 in December; currently ~13,500 roles remain stood down; outsourcing ground handling; reports that 87% of respondents in a survey of passengers would take a vaccine if required to travel internationally.
- **Singapore Airlines** resumes service to Nagoya after eight months.

4. Airport Information

- **İGA Istanbul Airport** was the busiest airport with 466 Dep/Arr flights on 9 December (declining over the last 2 weeks due to renewed lockdown in Turkey) followed by **Amsterdam** (455, +7%), **London/Heathrow** (419, +33%) Paris CdG (409, 0%), **Frankfurt** (379, +6%), **Madrid** (379, +15%), **Istanbul/Sabiha** (296, -18%), **Leipzig** (250, +16%) and **Cologne** (247, +3%).
- From the top 10 airports, most of the airports showed an increase over 2 weeks: London/Heathrow (+33%), Leipzig (+16%), Madrid Barajas (+15%), Amsterdam (+7%), Frankfurt (+6%) and Cologne (+3%). Paris CdG remained stable. The other airports reported a decrease with Istanbul/Sabiha (-18%), Oslo (-10%) and İGA Istanbul Airport (-8%).
- The biggest increases were recorded at London/Heathrow (+103 flights, +33%), Madrid Barajas (+49 flights, +15%), London/Stansted (+40 flights, +42%), Tel Aviv Ben Gurion (+38, +33%), Leipzig (+34, +16%) and Manchester (+30, +71%). At the other end of the scale, biggest decreases were recorded at Istanbul/Sabiha (-67 flights,-18%), İGA Istanbul Airport (-39, -8%), Antalya (-31, -32%) and Oslo (-26, -10%).



- Compared to 2019, Palma de Mallorca operated at -52% on 9 December, İGA Istanbul Airport (-57%), Tel Aviv (-59%), Nice (-63%), Amsterdam (-64%) London Stansted (-65%), Oslo (-66%), Madrid Barajas (-66%), London/Heathrow (-68%) and Paris CdG (-68%).

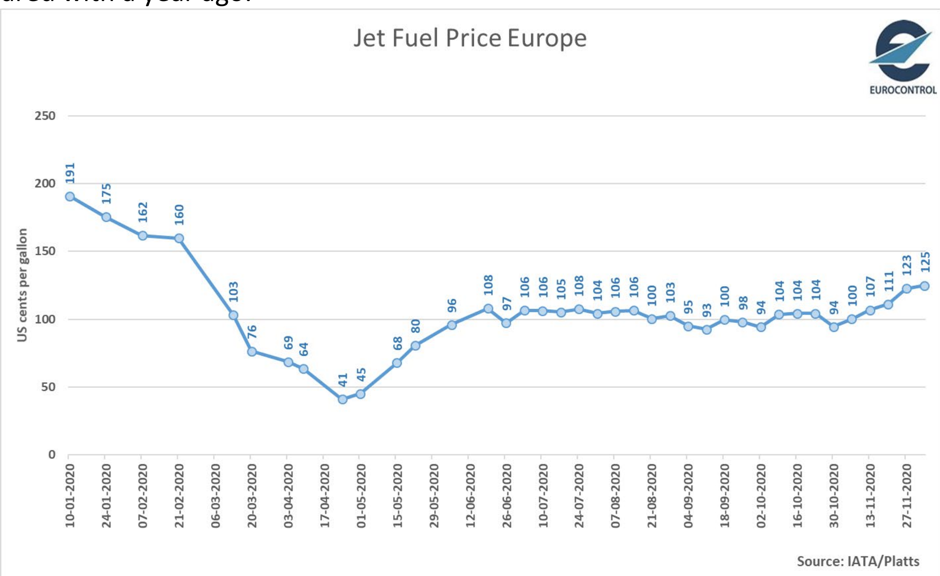


News from European and worldwide airports:

- **Arlanda** passengers down 87.1% in November.
- **Brussels airport** – Transavia suspends plans to open a base at the airport due to the COVID crisis.
- **East Midlands Airport** opens new on site coronavirus testing facility.
- **Fraport Slovenija** is to receive €5M in state aid subject to EC approval.
- **Istanbul Airport** handling 65-75k passengers daily.
- **Lyon-Saint Exupery** to offer services to 46 destinations from mid-December.
- **Munich airport** to reduce workforce by 1,500 people.
- **Zurich airport** loosing €900,000/day, pax down 90%.

5. Other factors

- **Fuel Price:** Over the 3rd quarter, jet fuel price remained globally stable. Prices have started to rise again in November. They closed at 125 cts/gal on Friday 4 December, 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 (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.