COVID19 Impact on European Air Traffic
EUROCONTROL Comprehensive Assessment

EUROCONTROL

Thursday, 17 December 2020

HEADLINES:

- 11,374 flights on 16 Dec - Traffic at 41% of 2019
- Steady increase in almost all States (+1,566 flights (+16%) compared to 2 weeks ago)
- 7-day rolling average at -61.1% of 2019
- Loss of -5.9 million flights vs 2019 (-55.1%) and 1.6B passengers so far
- Most airlines increasing their capacity.

Traffic Situation & Airlines Recovery

- **Over the first 16 days of December, traffic is -63%** compared to the same period in 2019, below the latest traffic scenarios.
- **General increase of capacity for most airlines** including Low cost carriers with the exception of Turkish aircraft operators and Ryanair (yesterday).
- **Turkish Airlines** was the airline with the highest number of flights with 578 flights on Wed 16 Dec stable compared to Wednesday 2 December (-2 flights), followed by **Air France** (378 flights, +52%, +129 flights), **Widerøe** (322, +9%, +27), **DHL Express** (313, +3%, +8), **KLM** (313, +25%, +63), **Lufthansa** (307, +36%, 81), **SAS** (236, +3%, +6), **Pegasus** (211, -7%, -15), **British Airways** (191, +122%, +105) and **Qatar Airways** (179 , +5%, +9). **Yesterday, Ryanair was ranked 11th (with 167 flights, down 33%) and easyJet 23rd (with 101 flights, up 189%)**
- Over the past two weeks, **most airlines increased their capacity** like **Air France** (+129 flights, +52%), **British Airways** (+105, +122%), **Wizzair** (+89, +307%), **Lufthansa** (+81, +36%), **easyJet** (+66, +189%) and **KLM** (+63, +25%). On the other side, Ryanair decreased its capacity (-84, -33%) and Pegasus (-15, -7%).
- In terms of dep/arr traffic, the top 8 busiest states remained stable with the exception of **France replacing the UK in 2nd postition**. **Germany** remained the State with the highest traffic with 1,952 flights on Wed 16 December (+17% over 2 weeks) followed by France (1,826, +28%), the UK (1,591, +25%), Spain (1,238, +16%), Turkey (1,086, -1%), Norway (899, +25%), Italy (814, +24%) and the Netherlands (652, +22%).
- **Business Aviation remained stable at** -19% in November (vs. 2019). **All-cargo remains slightly above** 2019 levels (+6%). **Charter flights are steadily recovering** week after week, reaching -10%. Traditional and Low-Cost, severely hit by the second wave are lagging behind at -69% and -82% respectively.

Traffic Flows & Country Pairs

- **The intra-Europe flow is the main flow** with 8,468 flights on 16 Dec (+16% over 2 weeks). Intra-Europe flights are at -61% compared to 2019 while all other flows are at -55%.
- **Top traffic flow with Europe** are **"Middle-East"** (571 flights, +14%) followed by **"Asia/Pacific"** (459 flights, +10%), **"North-Atlantic"** (449 flights, +8%) and "North-Africa" (308 flights, +27%).
- To be noted, high traffic decrease at Chengdu airport due to Covid-19 measures after confirmed cases reported.
- **Domestic flows are the most active** flows (i.e. 9 of the top 10 flows are domestic). The **highest increases** for domestic flows over 2 weeks were recorded for **Italy** (+30%), **France** (+25%), **Germany** (+20%), **Norway** (+16%), Greece (+11%), Spain (+8%), the UK (+4%) and Sweden (+1%). **Domestic flows in Turkey decreased** by -6%.

Airports

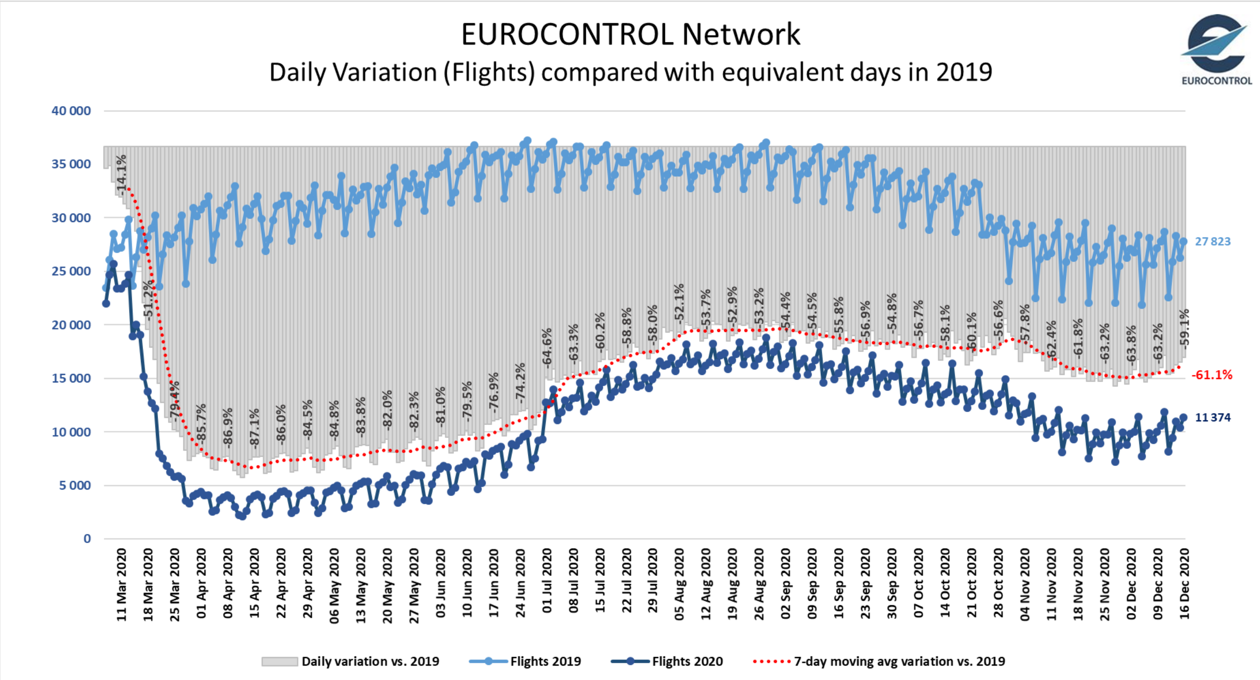
- **Amsterdam** was the busiest airport with 537 Dep/Arr flights on 16 December (+23% over 2 weeks) followed by **Paris CDG** (504, +28%), **Frankfurt** (492, +30%), **İGA Istanbul Airport** (485, -1%), **London/Heathrow** (463, +44%), **Madrid** (416, +12%), **Istanbul/Sabiha** (305, -7%), Oslo (264, +17%), Cologne (252, +4%) and **Leipzig** (226, -2%).
- From the top 10 airports, **most of the airports showed an increase** over 2 weeks: **London/Heathrow** (+44%), **Frankfurt** (+30%), **Paris CDG** (+28%), **Amsterdam** (+23%), Oslo (+17%), Madrid (+12%), Cologne (+4%). The other airports reported a decrease with Istanbul/Sabiha (-7%), Leipzig (-2%) and İGA Istanbul Airport (-1%).
- ACI reported **1 million passengers** on **Sun 6 Dec 2020,** compared to **5.6 million** on **Sun 8 Dec 2019 (i.e. -82%)**. Overall, from 1/1 until 6/12, Europe experienced a **loss of 1.6 billion passengers compared to 2019** (-80%).

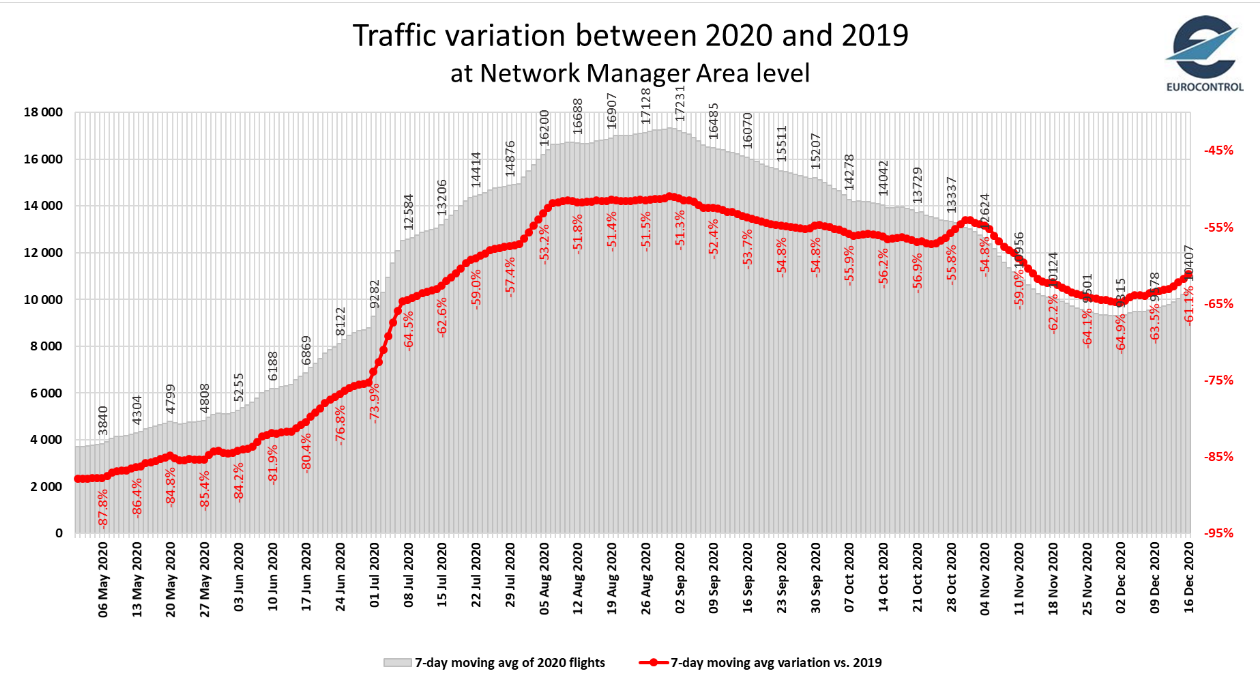
Economics

- **En-route air navigation charges:** The amount billed for en-route charges was **186M€ for November flights** (-64% compared to plan). From January till November, amounts billed are -59% compared to plan.

1. Traffic Situation and Airlines Recovery

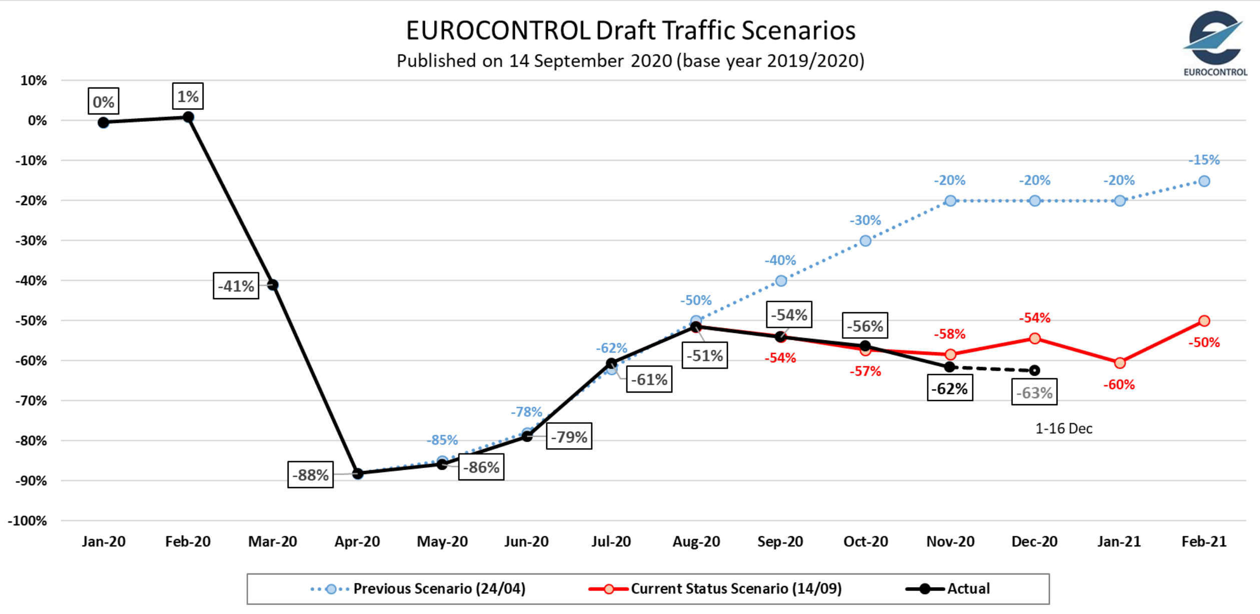
- The network recorded 11,374 flights on Wednesday 16 December (+16% with +1,566 flights compared to Wednesday 2 December). This is 40.9% of 2019 traffic levels. Based on a 7-day moving average, the decrease is -61.1% compared to 2019 and has been steadily increasing since 1 December.





Overall situation against EUROCONTROL traffic scenarios:

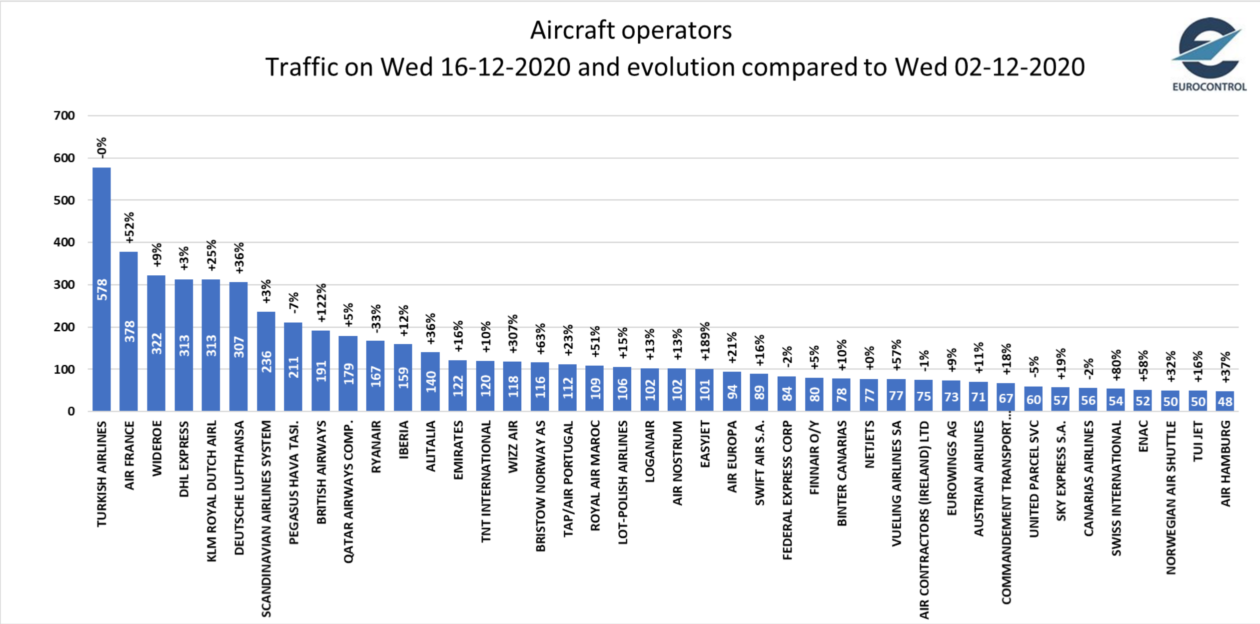
- **The first 16 days of December flights averaged -63% compared to same period in 2019**, (significantly lower than the scenario), due to the renewed lockdown across many European countries. This is slightly higher than a week ago, and traffic is expected to rise again from the second half of the month with end-of-the-year break.



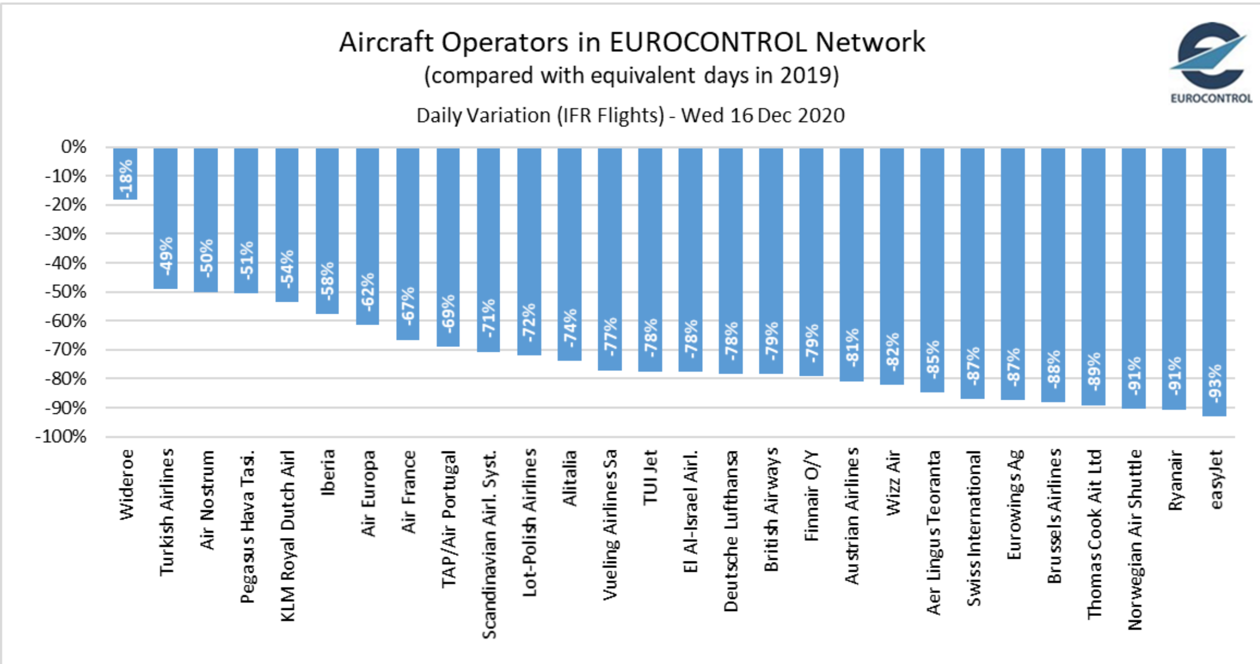
European Airlines:

Overall a generalised increase in capacity from Low Costs Carriers (easyJet, Wizzair, Vueling…) and also from network carriers (Air France, British Airways, Lufthansa, KLM, Alitalia …), with the exception of Ryanair, which decreased its capacity yesterday compared to 2 weeks ago, and Turkish aircraft operators which have reduced their capacities due to the application of enforced lockdown measures.

- **Turkish Airlines** was the airline with the highest number of flights with 578 flights on Wednesday 16 December stable compared to Wednesday 2 December (-2 flights), followed by **Air France** (378 flights, +52%, +129 flights), **Widerøe** (322 flights, +9%, +27 flights), **DHL express** (313 flights, +3%, +8 flight), **KLM** (313 flights, +25%, +63 flights), **Lufthansa** (307 flights, +36%, 81 flights), **SAS** (236 flights, +3%, +6 flights), **Pegasus** (211 flights, -7%, -15 flights), **British Airways** (191 flights, +122%, +105 flights) and **Qatar Airways** (179 flights, +5%, +9 flights). **Yesterday, Ryanair was ranked 11th (with 167 flights, down 33%) and easyJet 23rd (with 101 flights, up 189%).**
- Compared to two weeks ago, **most airlines increased** their **capacity**, for example Air France (+129 flights, +52%), British Airways (+105 flights, +122%), Wizzair (+89 flights, +307%), Lufthansa (+81 flights, +36%), easyJet (+66 flights, +189%), KLM (+63 flights, +25%) and Bristow Norway (+37 flights, +63%). On the other side, Ryanair decreased its capacity (-84 flights, -33%) and Pegasus (-15 flights, -7%).



- Compared to 2019, Widerøe operated at -18% on Wednesday 16 December followed by Turkish Airlines (-49%), Air Nostrum (-50%), Pegasus (-51%), KLM (-54%), Iberia (-58%), Air France (-67%), Lufthansa (-78%), British Airways (-79%), Ryanair (-91%) and easyJet (-93%).



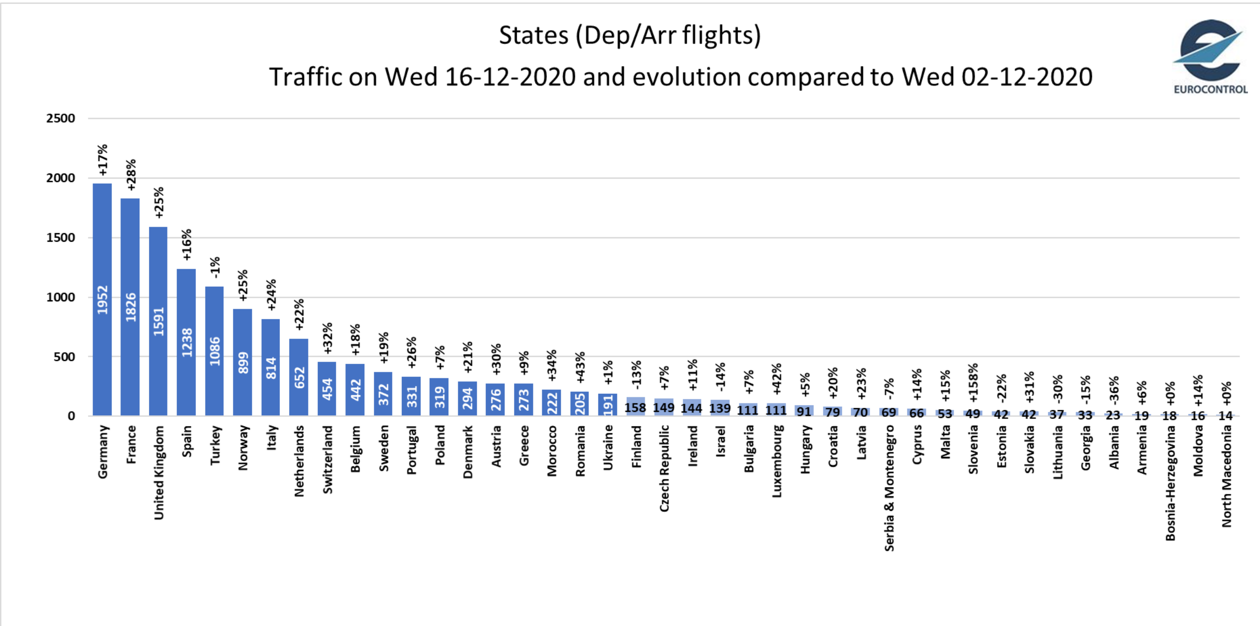
News from key European airlines:

- **airBaltic** confirms Riga as main hub.
- **British Airways** to operate to 11 seasonal destinations from Southampton May-Oct 2021.
- **Icelandair** says has enough liquidity to stay in low-production until mid2022.

- **Lufthansa** resumes service from Munich to Cape Town; reports successful trial of antigen testing; Group considering a further 10,000 job cuts and aims to be cash positive in 2021, with a return to profitability in 2022.
- **Pegasus** reports domestic passenger numbers in November down 34%, international down 63%; load factor 75%.
- **Royal Air Maroc** to add 160,000 seats on various routes between Morocco and Europe over 5 months from 15/12.
- **TUI Group** reports underlying EBIT loss of €3.0 billion for the financial year to the end of September; reports liquid funds of €2.5 billion; notes 50% of programme for May 2021 already booked.
- **Ukraine International** to restore 43 international routes as of March.
- **Virgin Atlantic** launches services to Pakistan; cancels services from Manchester to India.
- **Wizz Air** appoints Robert Carey as President from June 2021; to resume 33 services from Katowice airport by June.

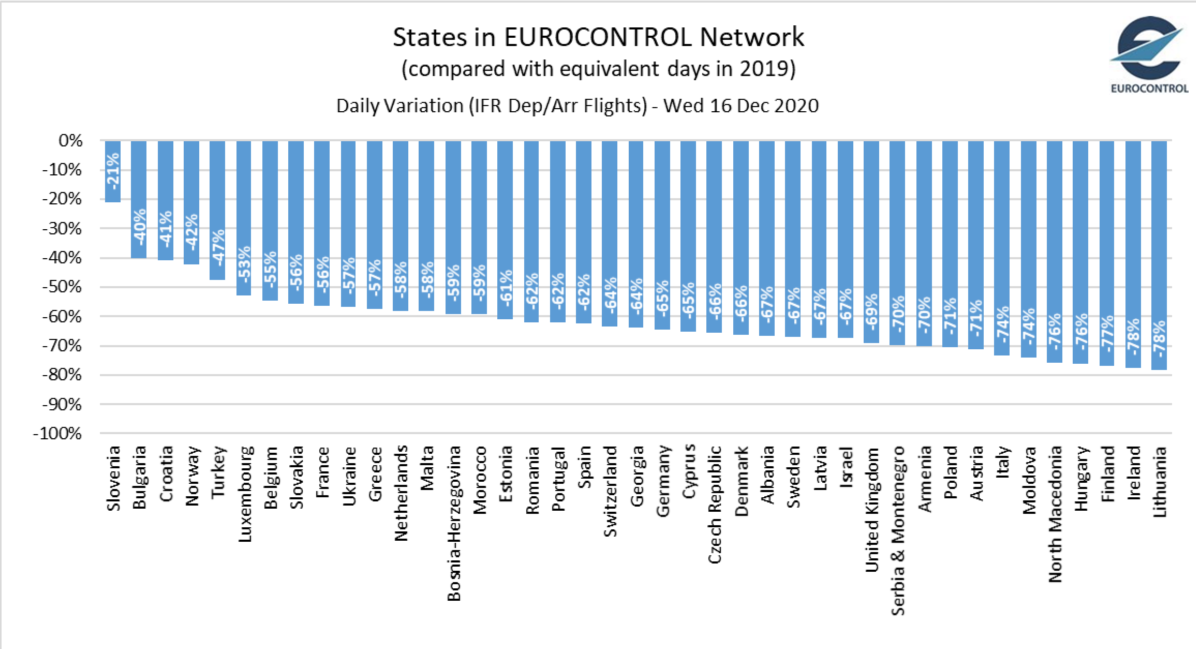
States

- Based on traffic levels, the top 8 busiest states[1] remained stable with the exception of France replacing the UK in 2nd position. Germany remained the State with the highest number of dep/arr flights with 1,952 flights on Wednesday 16 December (+17% over 2 weeks) followed by France (1,826, +28%), the UK (1,591, +25%), Spain (1,238, +16%), Turkey (1,086, -1%), Norway (899, +25%), Italy (814, +24%) and the Netherlands (652, +22%).



- Compared to 2019, Departure/Arrival traffic on Wednesday 16 December for these top 8 States was: Norway (-42%), Turkey (-47%), France (-56%), the Netherlands (-58%), Spain (-62%), Germany (-65%), the UK (-69%) and Italy (-74%).

[1] excluding overflights.

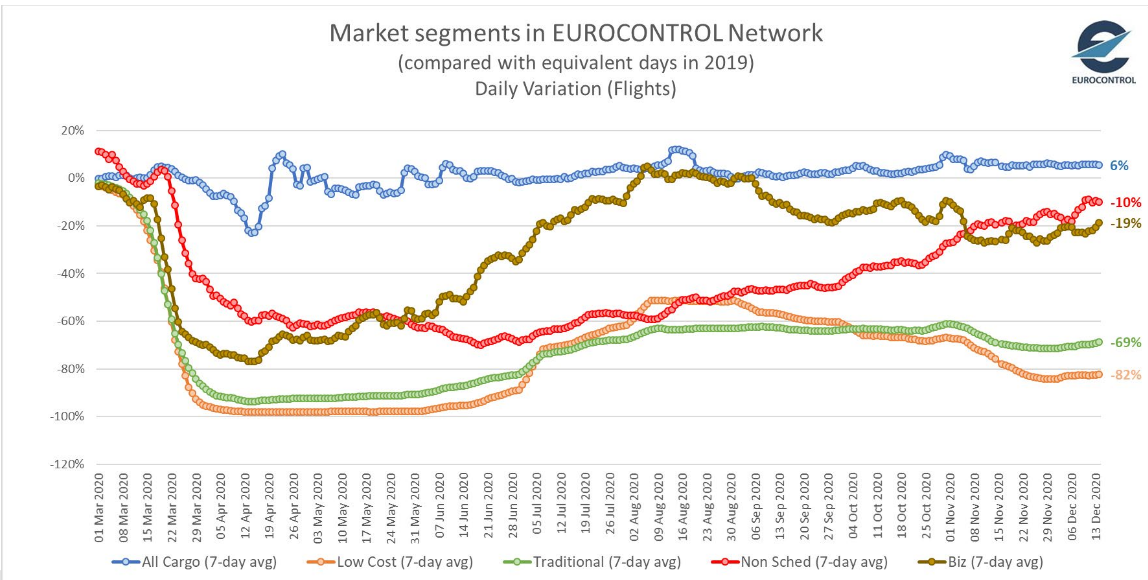


Other

- **Swedavia** secures €50M in financing from Nordic Investment Bank's corona funding.
- **NAV Canada** announces 180 job losses.
- **Israel** and **Morocco** to start direct flights between the two states.
- **Ukraine** looking to sign Open Skies agreement with the EU in February.

Market Segments:

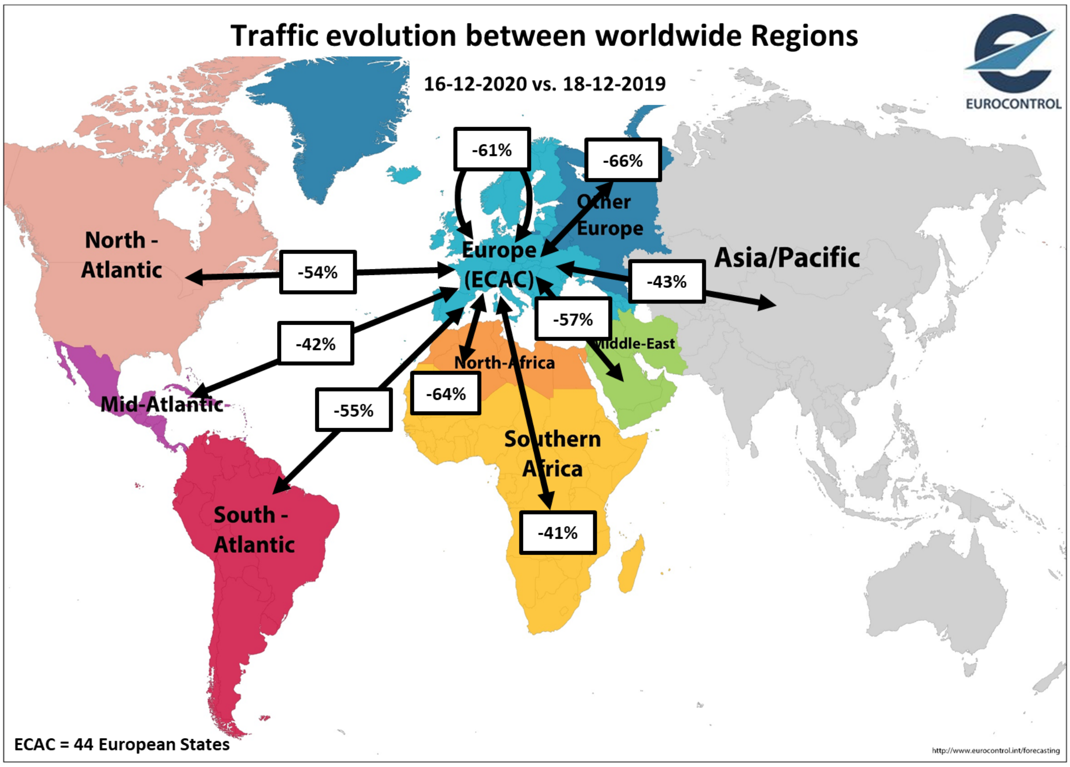
- On 13 December, **All-cargo** remains +6% above 2019 levels. **Charter** flights are steadily recovering, reaching -10% below 2019 levels. **Business Aviation** recorded a quick upturn at the end of May ,which was confirmed by a recovery to 2019 levels at the end of the summer. The segment started to decline again from September and it is now stabilized at -19% below 2019 levels. **Low-Cost** and **Traditional** segments, were severely affected by the new lockdown measures from the end of October and are respectively recording -82% and -69% declines (vs 2019).

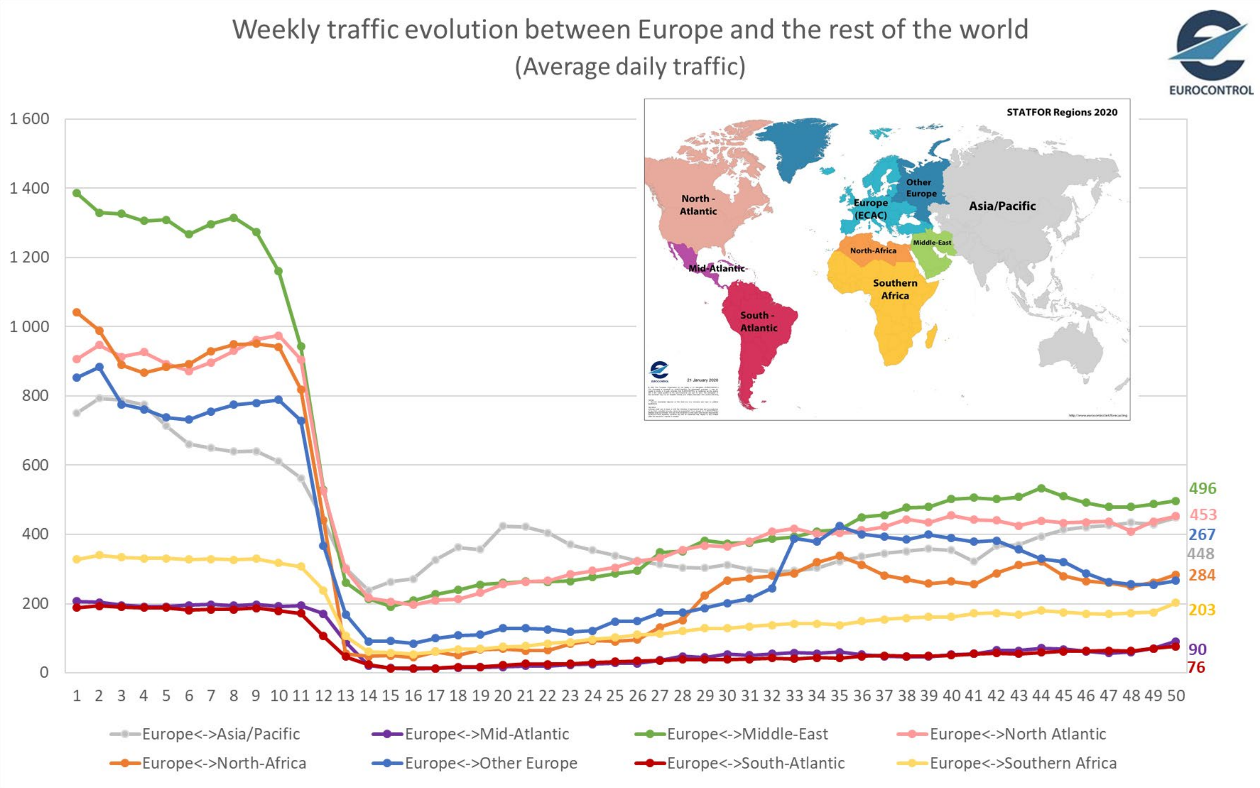


2. Traffic Flows & Country Pairs

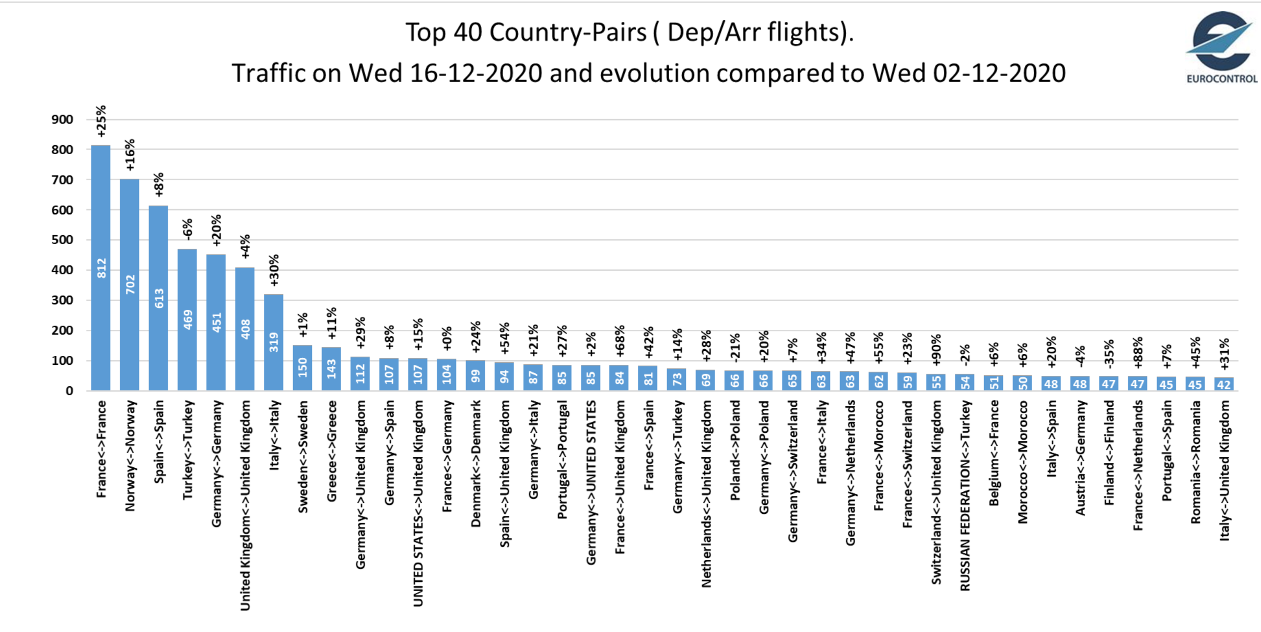
- The main traffic flow is the intra-Europe flow with 8,468 flights on Wednesday 16 December, which is increasing (+16%) over 2 weeks.
- The top traffic flows with Europe were with "Middle-East" (571 flights, +14%) followed by "Asia/Pacific" (459 flights, +10%), "North-Atlantic" (449 flights, +8%), "North-Africa" (308 flights, +27%) and "Other Europe" (269 flights, +16%).
- Intra-Europe flights are at -61% compared to 2019 while intercontinental flows are at -55%.

REGION	02-12-2020	16-12-2020	%	vs. 2019
Intra-Europe	**7 307**	**8 468**	***+16%***	***-61%***
Europe<->Asia/Pacific	418	459	*+10%*	*-43%*
Europe<->Mid-Atlantic	68	106	*+56%*	*-42%*
Europe<->Middle-East	499	571	*+14%*	*-57%*
Europe<->North Atlantic	414	449	*+8%*	*-54%*
Europe<->North-Africa	242	308	*+27%*	*-64%*
Europe<->Other Europe	231	269	*+16%*	*-66%*
Europe<->South-Atlantic	67	83	*+24%*	*-55%*
Europe<->Southern Africa	165	203	*+23%*	*-41%*
Non Intra-Europe	**2 104**	**2 448**	***+16%***	***-55%***

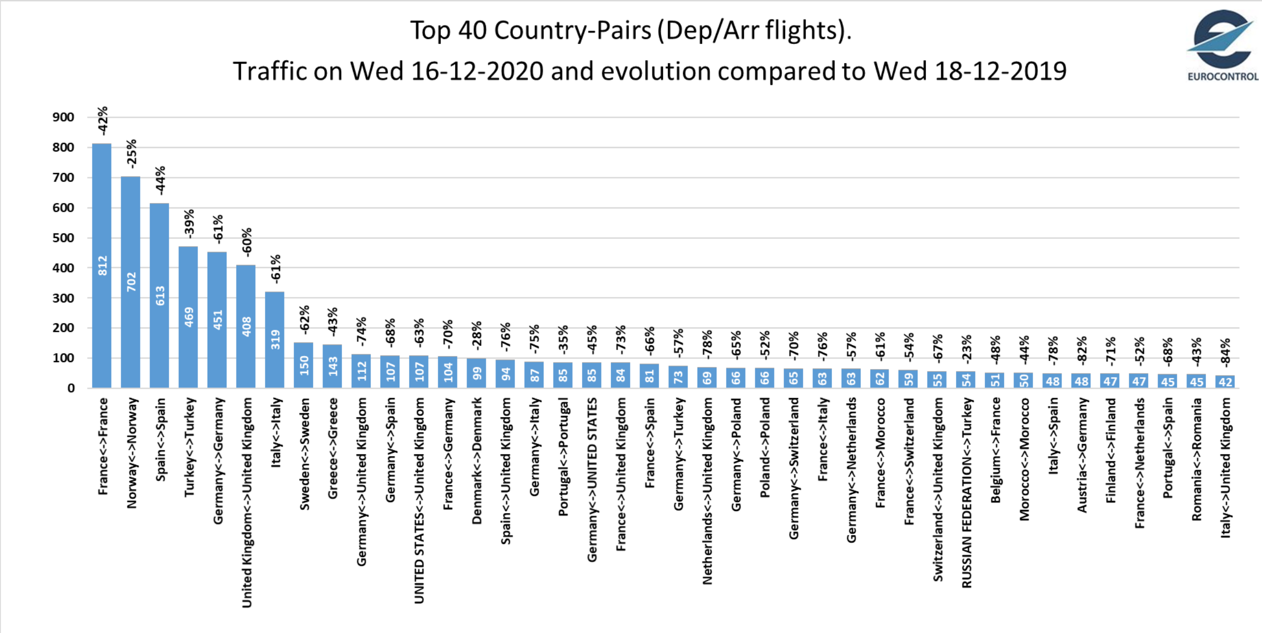




- **Domestic flows are the most active** flows (i.e. 9 of the top 10 flows are domestic). The highest increases for **domestic** flows over 2 weeks were recorded for **Italy** (+30%), **France** (+25%), **Germany** (+20%), **Norway** (+16%), Greece (+11%), Spain (+8%), the UK (+4%) and Sweden (+1%). **Domestic flows in Turkey decreased** by -6%.
- The busiest non domestic flows were **Germany-UK** (112 flights, +29%), **Germany-Spain** (107 flights, +8%), **US-UK** (107 flights, +15%) and **France-Germany** (104 flights, +0%).

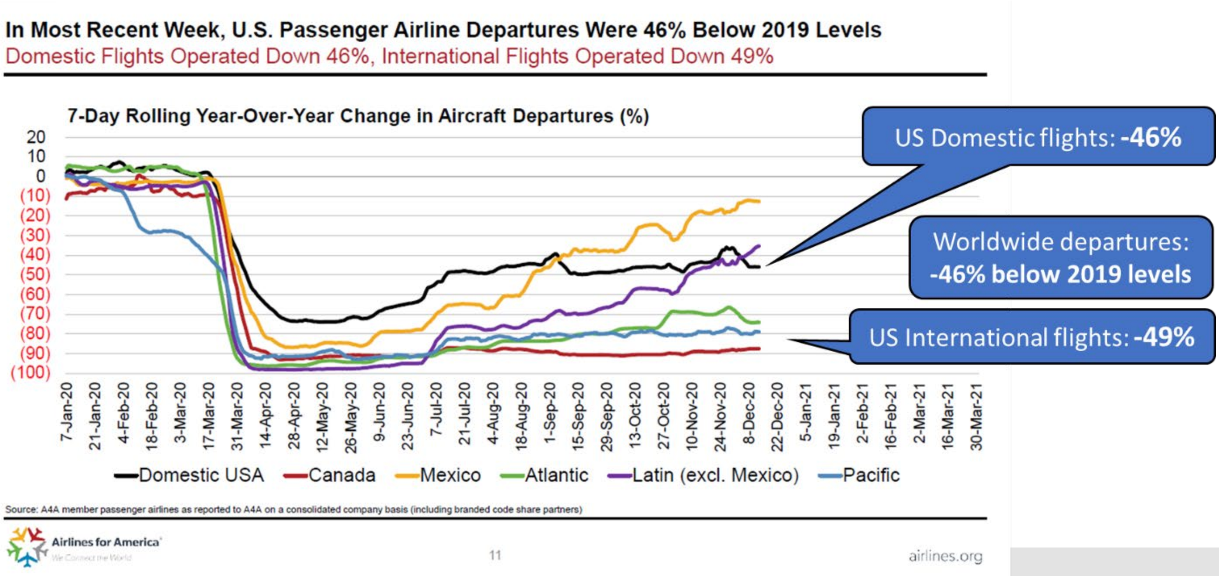


- Compared to 2019, the largest domestic flows on Wednesday 16 December 2020 were at -42% for France, -25% for Norway, -44% for Spain, -39% for Turkey, -61% for Germany, -60% for the UK, -61% for Italy -62% for Sweden and -43% for Greece.

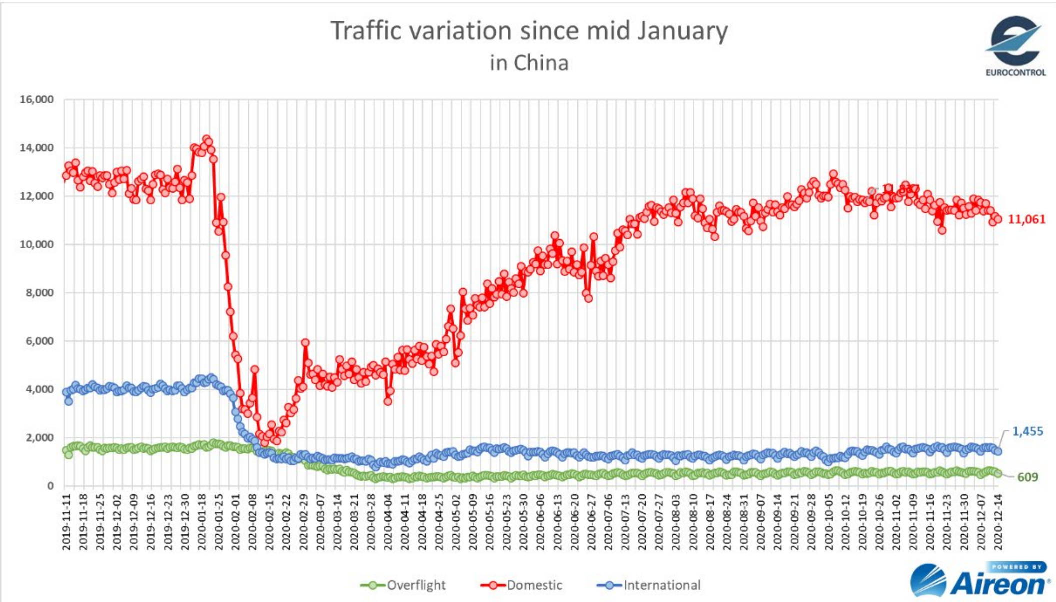


3. Situation outside Europe

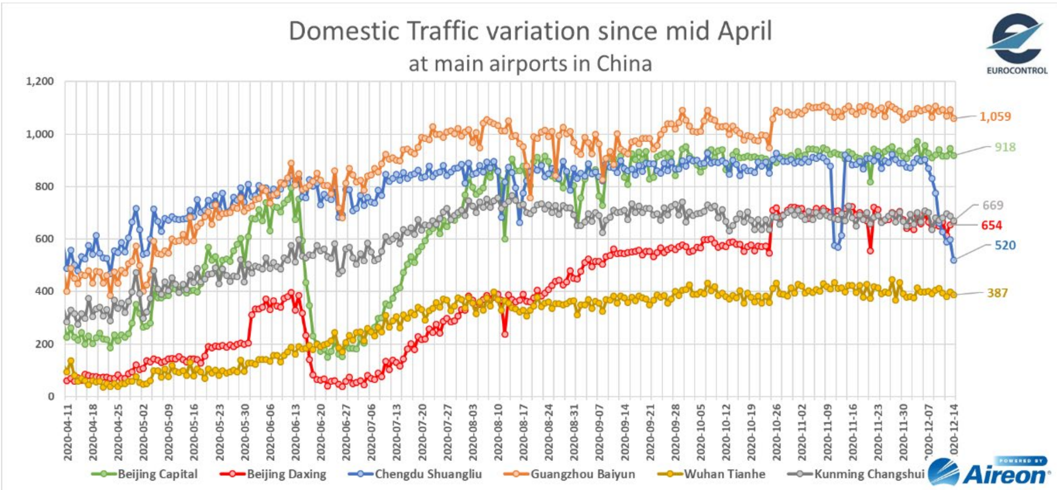
- **United-States (A4A members):**
  - Except for the blip related to Thanksgiving, US domestic traffic is stable at -46% (vs 2019) on 8 December. Latin America and Mexican flows continue to increase faster than the other flows over the past weeks.
  - In week ending Dec 16, U.S. airlines passenger volumes were 68% below 2019 levels with Domestic down 68% and International down 69%.
  - The domestic U.S. Load Factor averaged 47%% in most recent week, versus 82% a year earlier.



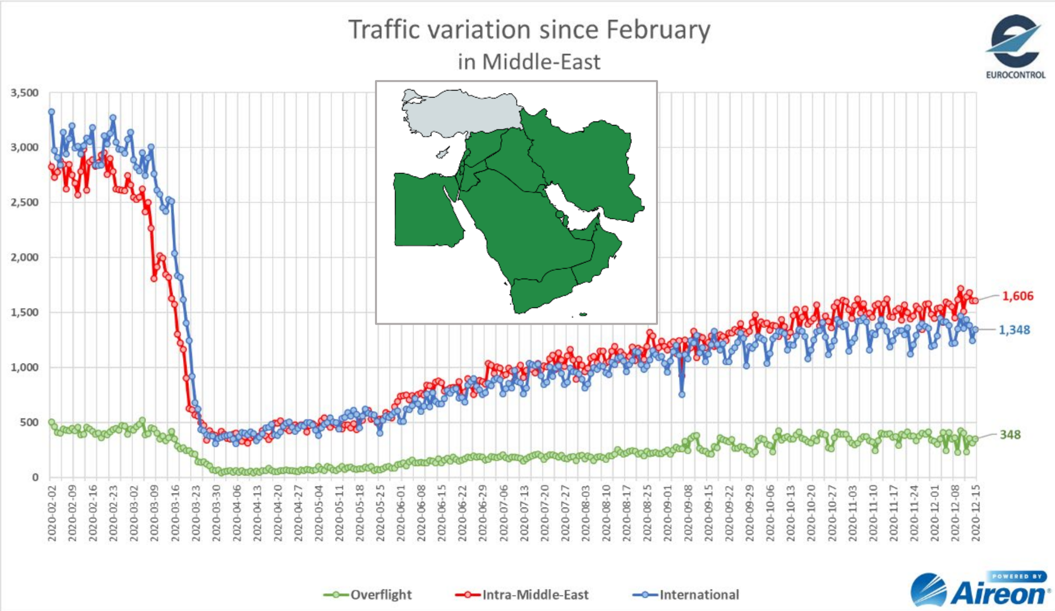
- **China:**
  - Chinese domestic flights remain stable with 11,061 flights (-7% compared to 1st January 2020). International flights have been stable too since March with 1,455 flights (-64% compared to 1st January 2020). The same is true for overflights with 528 flights (-67% compared to 1st January 2020).



  - To be noted, the high decrease of traffic at Chengdu airport, capital of China's Sichuan province, due to stricter anti-pandemic measures after **four** more confirmed cases of Covid-19 were reported on Tuesday (Dec 8), making a total of **six** confirmed cases plus one asymptomatic case discovered this week in the city.



- **Middle East:**
  - Since the beginning of April, Intra-Middle-East traffic has been increasing slowly reaching 1,606 flights on 15 December (-42% compared to February 2020). Likewise, international traffic has been recovering from early April but remains still slightly below domestic levels with 1,348 flights (-56% 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 348 flights (-19% compared to February 2020).

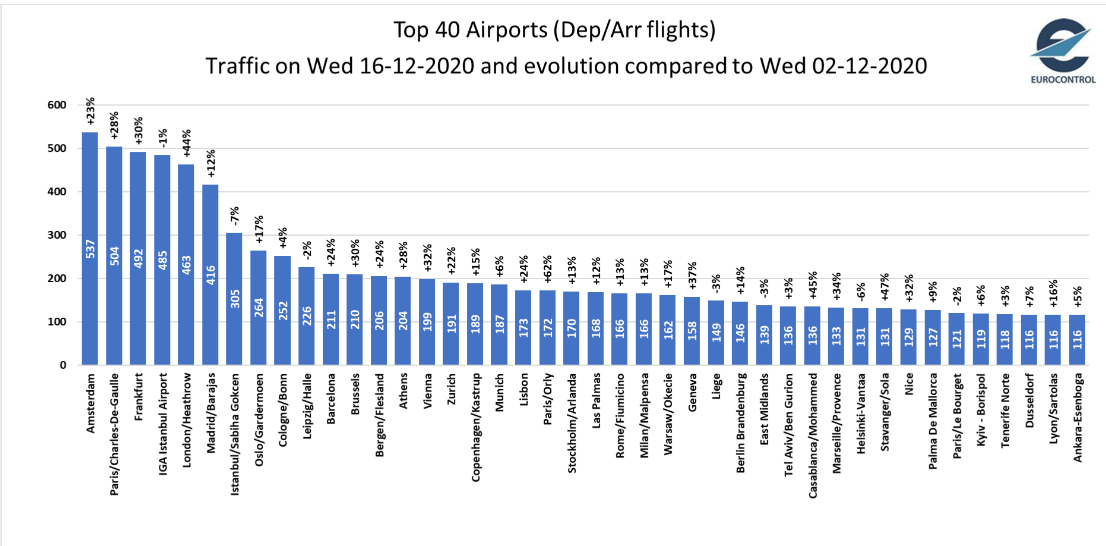


News for worldwide airlines:

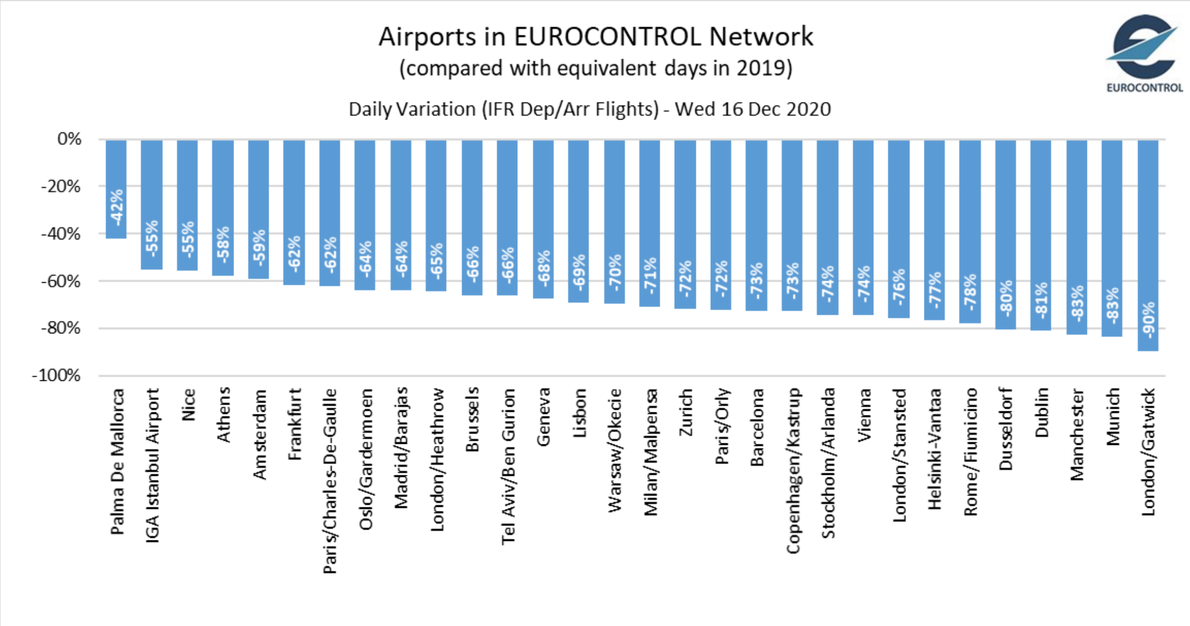
- **China Eastern Airlines Group** reports passengers down 27% y-o-y in November (domestic -14.5%, international -98.3%) with a load factor of 70.9%.
- **Emirates** returning 2 Boeing 777-300ER and one A380 to service; resuming daily service to Istanbul.
- **Singapore Airlines** reports passengers down 97.6% in November, with a load factor of 71%; reports on preparations for distribution of vaccines.

4. Airport Information

- **Amsterdam** was the busiest airport with 537 Dep/Arr flights on 16 December (+23% over 2 weeks) followed by **Paris CDG** (504, +28%), **Frankfurt** (492, +30%), **İGA Istanbul Airport** (485, -1%), **London/Heathrow** (463, +44%), **Madrid** (416, +12%), **Istanbul/Sabiha** (305, -7%), Oslo (264, +17%), Cologne (252, +4%) and **Leipzig** (226, -2%).
- From the top 10 airports, **most of the airports showed an increase** over 2 weeks: **London/Heathrow** (+44%), **Frankfurt** (+30%), **Paris CDG** (+28%), **Amsterdam** (+23%), Oslo (+17%), Madrid (+12%), Cologne (+4%). The other airports reported a decrease with Istanbul/Sabiha (-7%), Leipzig (-2%) and İGA Istanbul Airport (-1%).



- Compared to 2019, İGA Istanbul Airport operated at -55% on 16 December, Amsterdam (-59%), Frankfurt (-62%), Paris CDG (-62%), Oslo (-64%), Madrid (-64%) and London Heathrow (-65%).

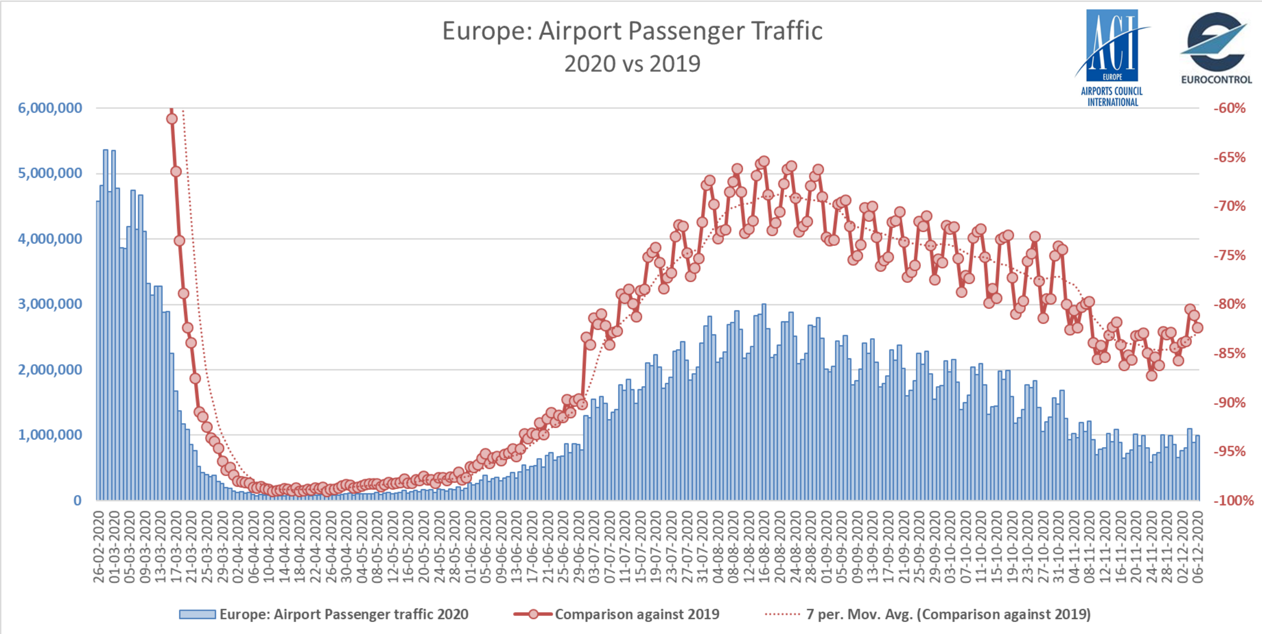


News from European and worldwide airports:

- **Avinor Group** passengers down 77.7% in November.
- **Barcelona Airport** passengers down 91% in November.
- **Brussels Airport** passengers down 88%, cargo up 7% in November.
- **Copenhagen Airport** passengers down 91% in November.
- **Dublin Airport passengers** down 77% for 11 months of 2020; to return employees to full salaries as of 28 March; expects Christmas passenger numbers to do 88% down.
- **Frankfurt Airport** passengers down 87% in November.
- **Heathrow Airport** passengers down 88% in November; Terminal 4 will remain non-operational until the end of 2021.
- **Madrid Barajas Airport** passengers down 85% in November.
- **Paris** November passengers down 89% at **CDG** and 84% at **Orly**.
- **Vienna Airport** passengers down 92% in November.
- **Zurich Airport** passengers down 89% in November.

Passengers:

- According to **ACI**, passenger traffic has remained stable in the summer at -69% over August compared to August 2019. On Sunday 6 December, ACI reported 1 million passengers compared to 5.6 million on Sunday 8 December 2019 (i.e. -82%). Overall, from 1 January until 6 December 2020, Europe experienced a loss of 1.6 billion passengers compared to 2019 (-80%).

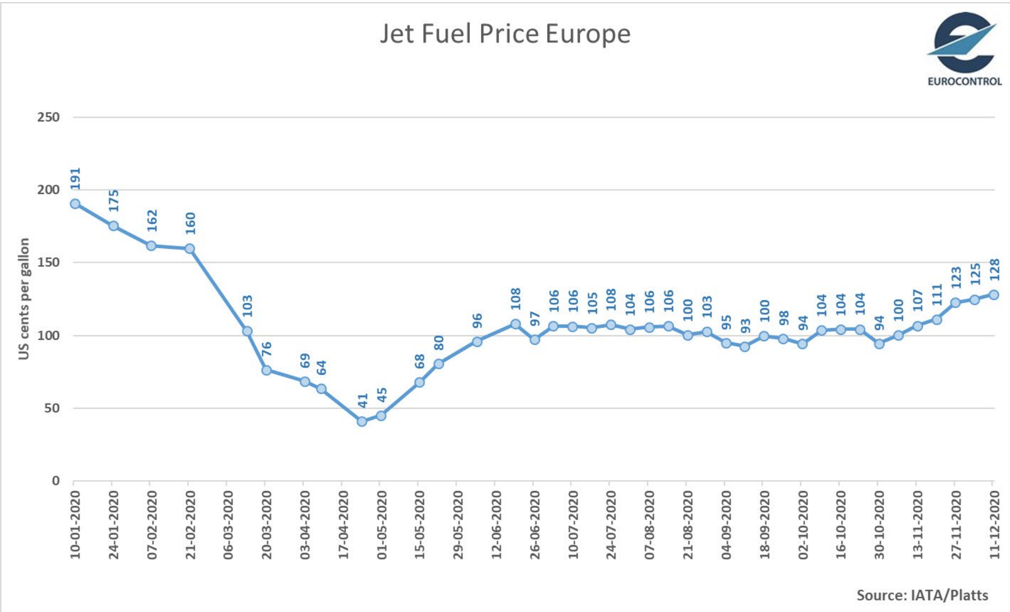


5. Other factors

- **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 186M€ for November flights (-64% compared to plan) after a maximum of 330M€ for August flights. On a year to date basis (Jan-Nov), route charges are -59% compared to plan for 2020.

Route Charges in M€	Jan flights	Feb flights	Mar flights	Apr flights	May flights	Jun flights	Jul flights	Aug flights	Sep flights	Oct flights	Nov flights
Total net chargeable amounts (VAT excl.)	547	516	357	73	95	120	255	330	287	260	186

- **Fuel Price:** Over the 3rd quarter, jet fuel price remained globally stable. Prices have started to rise again in November. They closed at 128 cts/gal on Friday 11 December, but they remain 30% 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.