COVID19 Impact on European Air Traffic
EUROCONTROL Comprehensive Assessment

EUROCONTROL

Wednesday, 14 October 2020

Traffic Situation & Airlines Recovery

- **12,733 flights on Tuesday 13 October, (-16% with -1,504 flights vs. 29 Sept) reaching 40% of 2019 levels (Note that Tuesdays have traditionally been the quietest day of the week for traffic during the pandemic).**
- 7-day moving average is -56.0% compared to 2019.
- Over **1-13 October traffic is -56%**, in line with the scenarios for the moment.
- Airlines are reporting very low forward booking rates until end of 2020 compared to normal.
- **Ryanair remains the busiest carrier with 791 flights** on Tuesday 13 October showing a decrease of -30% compared to Tuesday 29 September (-345 flights). **All major airlines decreased their capacity except British Airways (303 flights, +53%, +105 flights)** and Wideroe (333 flights, +1%, +3 flights). Turkish Airlines was the 2nd busiest operator with 558 flights (-6%, -38 flights), followed by Air France (460 flights, -5%, -25 flights), Lufthansa (401 flights, -5%, -22 flights) and KLM (360 flights, -6%, -22 flights).
- Compared to two weeks ago, **British Airways (+105 flights)** was the carrier which has increased the most its capacity followed by ENAC (+16). Most big airlines decreased their capacity: **Ryanair (-345)**, **EasyJet (-270)**, Turkish (-38), Eurowings (-36), NetJets (-31), Alitalia (-28) Air france (-25), KLM (-22) and Lufthansa (-22).
- Compared to 2019, Widerøe operated at -19% on Tuesday 13 Oct followed by Pegasus (-35%), KLM (-52%), Turkish Airlines (-58%), Air France (-59%), Wizz Air (-64%), British Airways (-68%), Ryanair (-68%), Lufthansa (-75%) and easyJet (-84%).
- Compared to 2019, Departure/Arrival traffic in Spain was -73% on Tuesday 13 October, the UK (-69%), Italy (-64%), Germany (-63%), France (-55%), Turkey (-50%) and Norway (-38%).
- Business Aviation recovery has gaining pace since early October (reaching -10% vs. 2019) while all-cargo remains stable at 2019 levels (+3%). **Low-cost flights decreased** early September and even more in October with -66% vs 2019. Charter flights increased since October reaching -37%.

Traffic Flows & Country Pairs

- The intra-Europe flow is the main flow with 10,469 flights on 13 Oct (-12% on 29 Sept). Top traffic flows with Europe were with **"Middle-East" (466 flights, +3%)** followed by "North-Atlantic" (387 flights, -5%), "Other Europe" (333 flights, -7%), "Asia/Pacific" (293 flights, -6%) and "North-Africa" (207 flights, -1%).
- **Intra-Europe flow is at -58%** compared to 2019 while all other flows are at -68%.
- From the top domestic flows, only Sweden (+8%) and Germany showed an increase (+1%). All other domestic flows decreased like in Greece (-17%), Spain (-11%), the UK (-10%), France (-7%), Turkey (-5%) and Italy (-3%).
- The busiest non domestic flows were Turkey-Russia (178 flights, -10%) followed by Germany-UK (163 flights, -5%), Germany-Greece (159 flights +8%) and Germany-Italy (153, -11%).

Airport Information

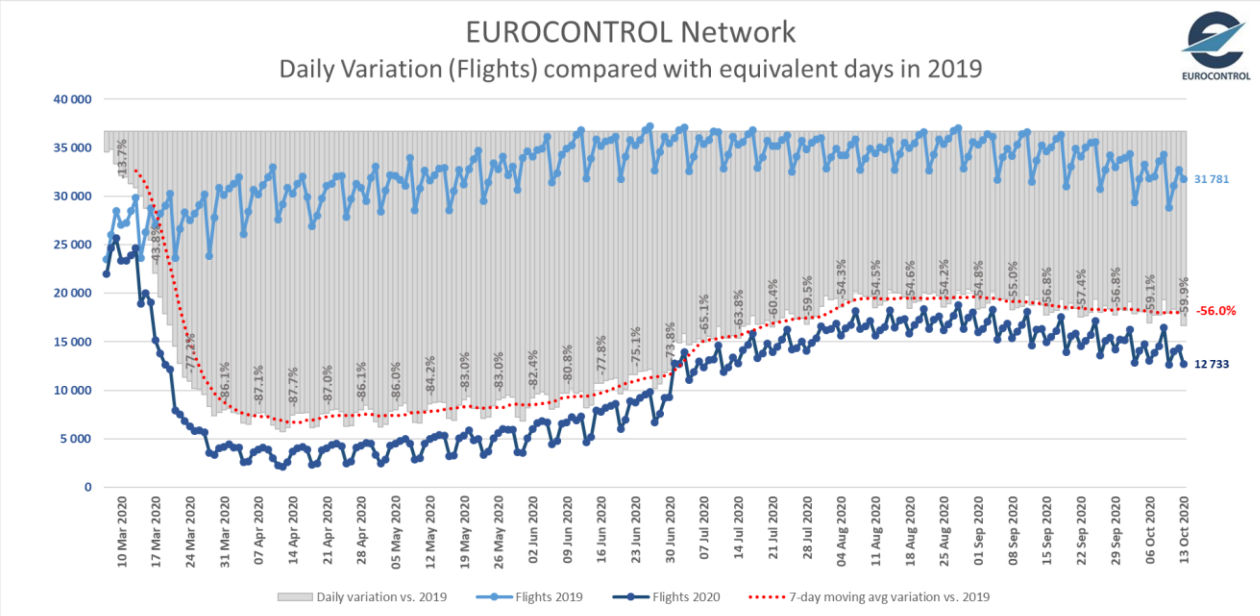
- After having reached -69% in August compared to August 2019, passenger traffic started to decrease since mid-August to reach **2.3 million passengers** on Sunday 29 September (-72% compared to 2019). Overall, since 1st January 2020, Europe experienced a **loss of 1.3 billion passengers** over 2019 (-80%).
- **Amsterdam was the busiest airport** with 572 dep/arr flights on 13 Oct (-7% over the last 2 weeks), followed by London/Heathrow (489, +23%), Paris CDG (483, -9%), Frankfurt (443, -0%), Istanbul/Sabiha (424, -3%), İGA Istanbul Airport (394, -7%), Oslo (356, +0%), Antalya (336, -3%), Munich (311, -13%) and Madrid (290, -13%).
- From the top 10 airports, only **London/Heathrow (+23%)** presented an increase over 2 weeks. Most airports reported a decrease like Munich (-13%), Madrid (-13%), Paris CDG (-9%), Amsterdam (-7%), İGA Istanbul Airport (-7%), Istanbul/Sabiha (-3%) and Antalya (-3%). Frankfurt was stable while Athens and Barcelona experienced a significant decrease with -20% and -13% respectively.
- Compared to 2019, Athens operated at -53% on 13 October, Amsterdam (-61%), London Heathrow (-64%), Paris CDG (-66%), İGA Istanbul Airport (-67%), Frankfurt (-70%), Roma (-74%) and Madrid (-76%).

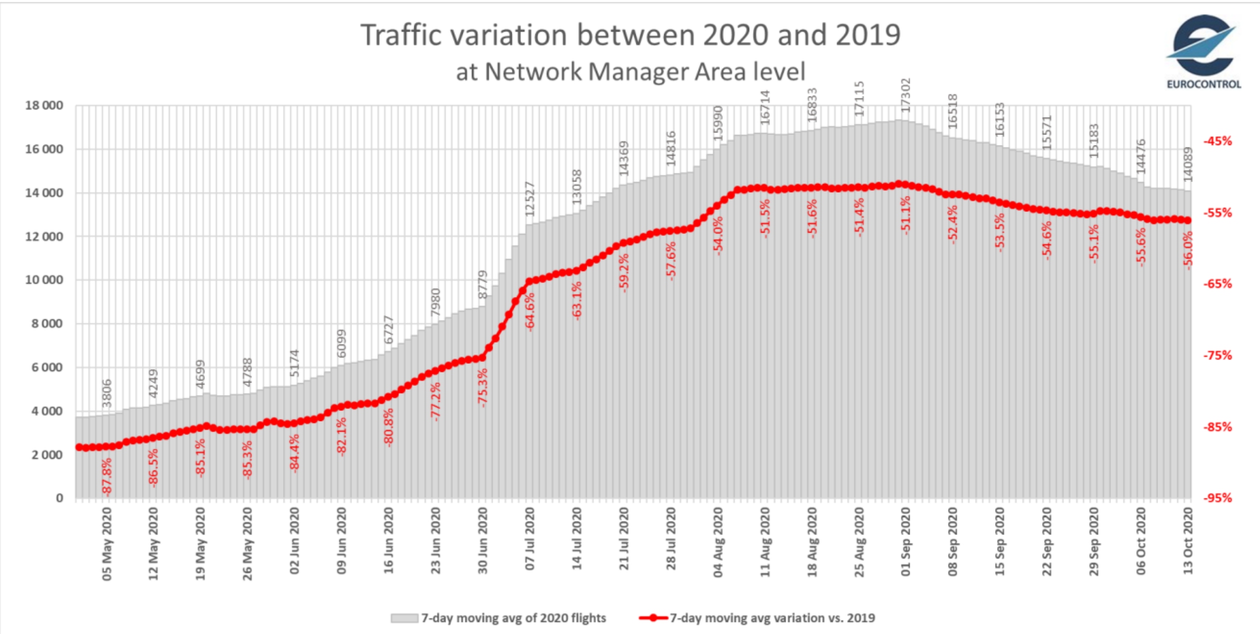
Economic

- **En-route air navigation charges:** The amount billed for en-route charges was **287M€ for September flights** (-61% compared to plan), showing a slight decrease compared to August flights (330M€).
- **Fuel price:** Fuel price reached 104cts/gal on 9 October 2020.

1. Traffic Situation and Airlines Recovery

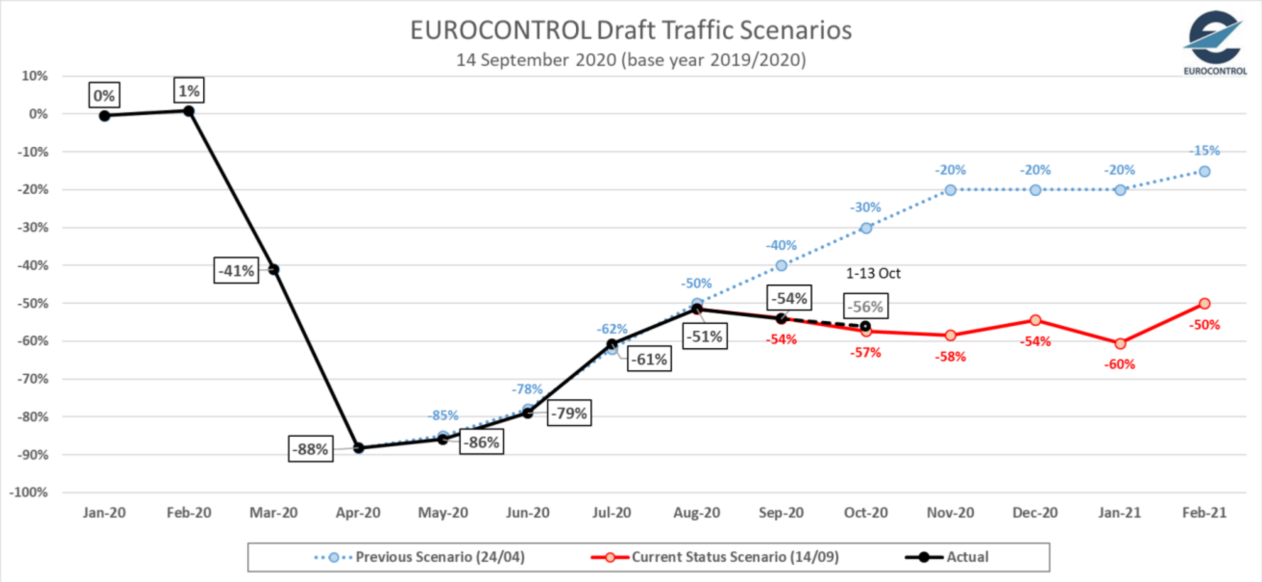
- 12,733 flights on Tuesday 13 October, (-16% with -1,504 flights compared to Tuesday 29 October). This is 40% of 2019 traffic levels. Based on a 7-day moving average, the decrease is -56.0% compared to 2019 which is now degrading since early September (due to the increase of States' restrictions) and even more since 1st October with Ryanair and easyJet removing more than 615 flights per day. It was stable over the last week.
- Friday 28 August remains the peak day (18,802 flights) when traffic levels reached -49.2% of 2019 levels for the first time since 18 March.





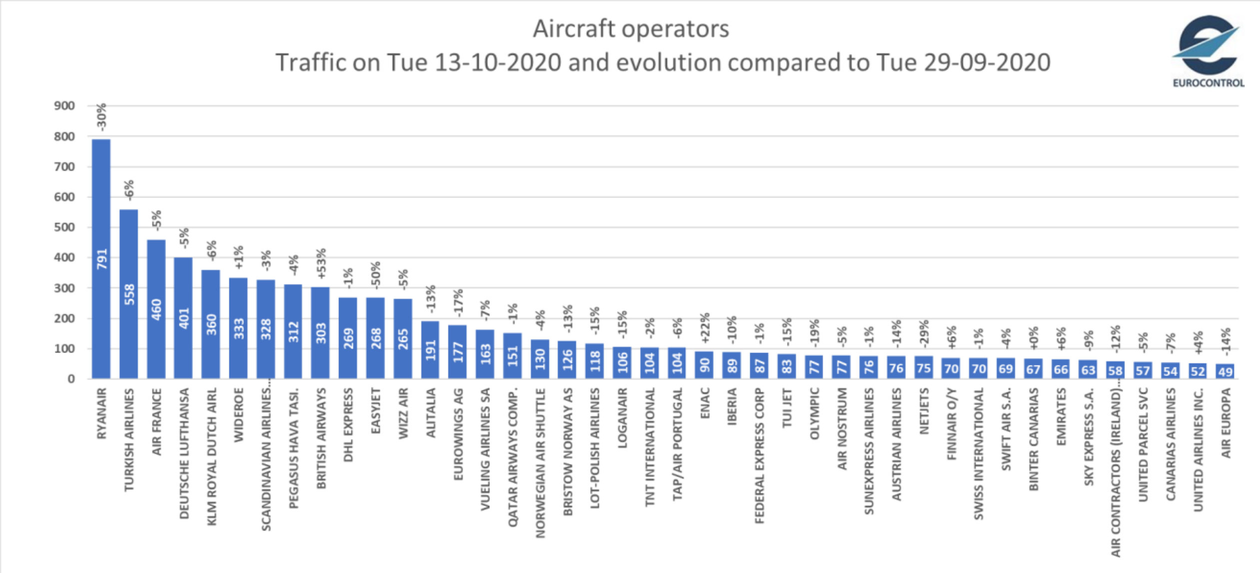
Overall situation against EUROCONTROL traffic scenarios:

- On 14 September, EUROCONTROL issued updated traffic scenarios to take account of the impact of individual and uncoordinated national restrictions, quarantine requirements and testing measures, which are primarily in accordance with National epidemiological assessments and National health measures. Often, these measures are announced with very short notice. This 'uncoordinated approach' by States has led to much confusion and eroded passenger confidence.
- Under its new "Current Status Scenario", the total number of flights expected in Europe is anticipated to be 55% lower than in 2019, a drop of 6 million fewer flights, or a further 1 million reduction in European flights than previously anticipated.
- Over the first 13 days of October, the traffic is fully in line with -56%.

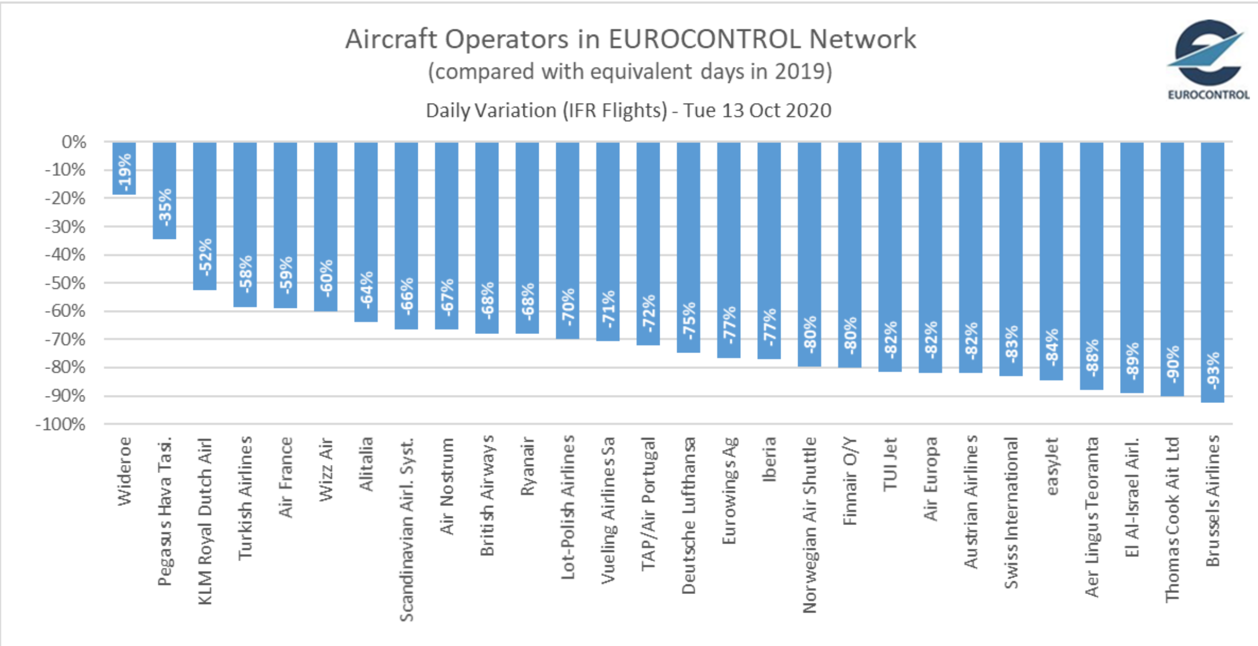


European Airlines:

- Ryanair was the airline with the highest number of flights with 791 flights on Tuesday 13 October showing a decrease of -30% compared to Tuesday 29 September (-345 flights). All major airlines decreased their capacity except British Airways (303 flights, +53%, +105 flights) and Wideroe (333 flights, +1%, +3 flights). Turkish Airlines was the 2nd busiest operator with 558 flights (-6%, -38 flights), followed by Air France (460 flights, -5%, -25 flights), Lufthansa (401 flights, -5%, -22 flights) and KLM (360 flights, -6%, -22 flights).
- Compared to two weeks ago, British Airways was the carrier which has increased its capacity the most (+105 flights) followed by ENAC (+16). Most big airlines decreased their capacity: Ryanair (-345), EasyJet (-270), Turkish (-38), Eurowings (-36), NetJets (-31), Alitalia (-28) Air france (-25), KLM (-22), Lufthansa (-22) and LOT (-21).



- Compared to 2019, Widerøe operated at -19% on Tuesday 13 October followed by Pegasus (-35%), KLM (-52%), Turkish Airlines (-58%), Air France (-59%), Wizz Air (-64%), British Airways (-68%), Ryanair (-68%), Lufthansa (-75%) and easyJet (-84%).

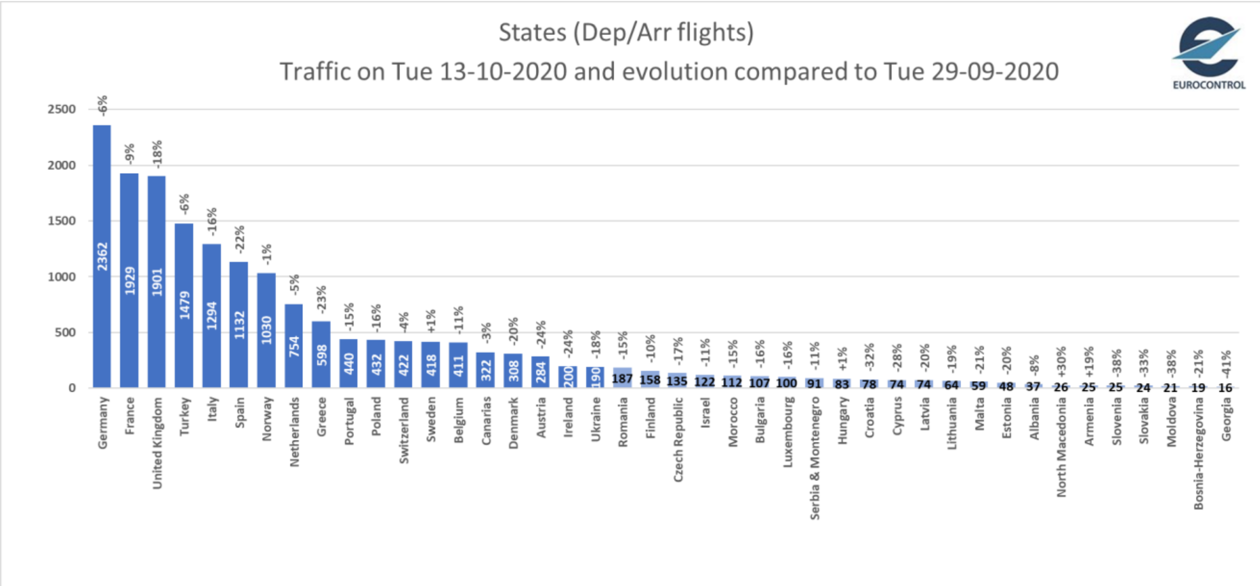


News from key European airlines:

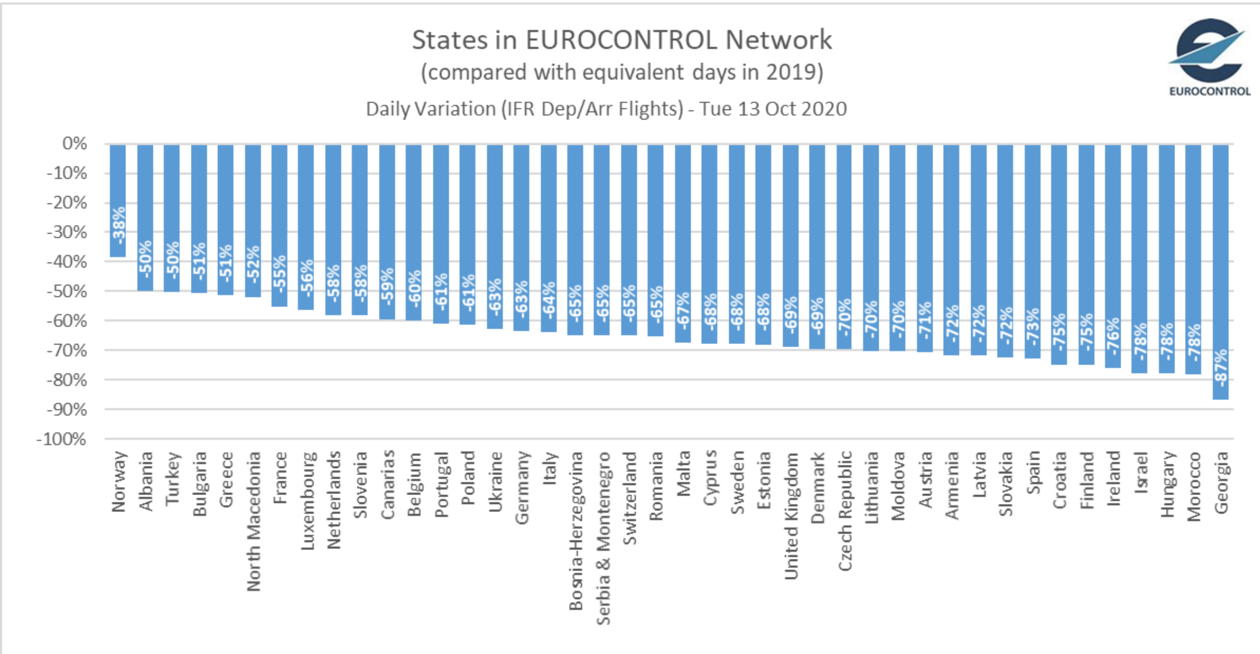
- **Aegean Airlines** expects to operate at 60-60% of 2019 levels in 2021.
- **Alitalia** – new company set up by government decree.
- **Blue Air** has launched new service Bucharest – Amsterdam. Operations has started on 9th October with daily operations.
- **British Airways** – new CEO Sean Doyle, replacing Alex Cruz.
- **Brussels Airlines** delays resumption of Ljubljana service to February.
- **Condor** will restart long-haul operations form Frankfurt International Airport and Dusseldorf International airport to Cuba.
- **easyJet** expects to operate approximately 25% of planned capacity in Q1 2021; planning two new seasonal bases in Faro and Malaga; suspending its service to Ljubljana; reporting temporarily closure of two Italian bases – Naples and Venice for the period of Winter 2020/2021.
- **El Al** plans to resume services to Los Angeles and Miami.
- **Finnair** reports pax down 91% in September, with load factor down to 32%, while SAS pax were 79% down with a load factor of 36%.
- **KLM** launching service to Zanzibar, reduces frequency to Kilimanjaro.
- **LOT Polish Airlines** CEO said he expects 3 million pax in 2020 (70% down on 2019) and 5 million in 2021.
- **Lufthansa Group** reports burning through €500m of its cash reserves a month and notes they will be happy if they can reach 20% of 2019 capacity levels this winter.
- **Lufthansa** and **Eurowings** suspending passenger operations at Leipzig/Halle until May.
- **Lufthansa** resumes Cape Town service.
- **Norwegian Airlines** passengers' figure for September decreased by up to 90% compared to same period last year. The load factor, ASK and RPK declines were down -37%, -93% and -96% respectively.
- **Pegasus Airlines** reported passengers down 45% (dom. -20%, int. -69%) in September with a load factor of 74%.
- **Ryanair** planning to take delivery of its first 737 MAX in early 2021.
- **SAS** passengers' number for September dropped to -78.6% compared to same period last year.
- **SWISS pilot association** reporting potential deployment of pilots as train drivers.
- **Turkish Airlines** reported passengers down 65% (dom. -50%, int. -74%) in September with a load factor of 69%.
- **Volotea** launched its Christmas Holidays offer for 2020. The airline is to offer 10 new routes, 60 exclusive routes and will increase seats capacity with 33% comparing to 2019. Some of the new routes will include flights between Spain, Italy and France.
- **Wizz Air** planning to open its first base in Norway. Operations start on 5th November, offering three routes with A321 aircraft.

States

- Based on traffic levels, the Top 6 busiest States[1] is stable with France switching the 2nd rank with the UK compared to last week. Germany had 2362 flights on Tuesday 13 October (-6% over 2 weeks) followed by France (1929, -9%), the UK (1901, -18%), Turkey (1479, -6%), Italy (1294, -16%), Spain (1132, -22%), Norway (1030, -1%), Netherlands (754, -5%), Greece (598, -23%), Portugal (440, -15% and Poland (432, -16%).



- Compared to 2019, Departure/Arrival traffic in Spain was -73% on Tuesday 13 October, the UK (-69%), Italy (-64%), Germany (-63%), France (-55%), Turkey (-50%) and Norway (-38%).

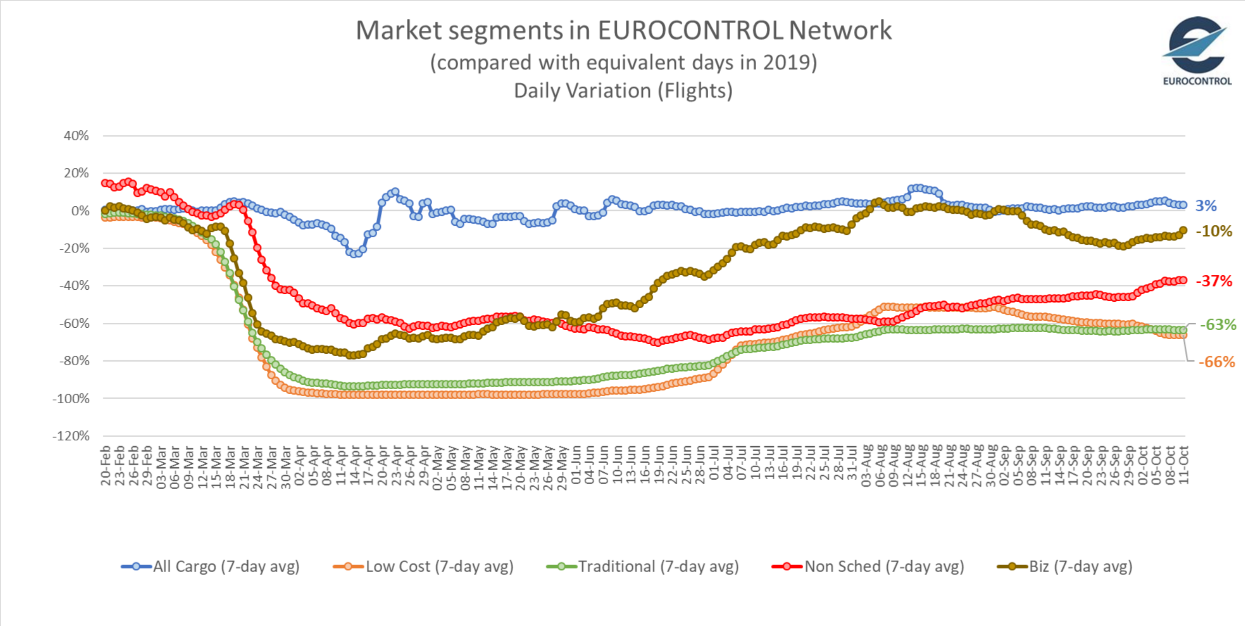


- International airlines to stop operations to Armenia and Azerbaijan because of the conflict between the two countries. Currently, Azerbaijan has banned all international flights, except to Turkey

[1] excluding overflights.

Market Segments:

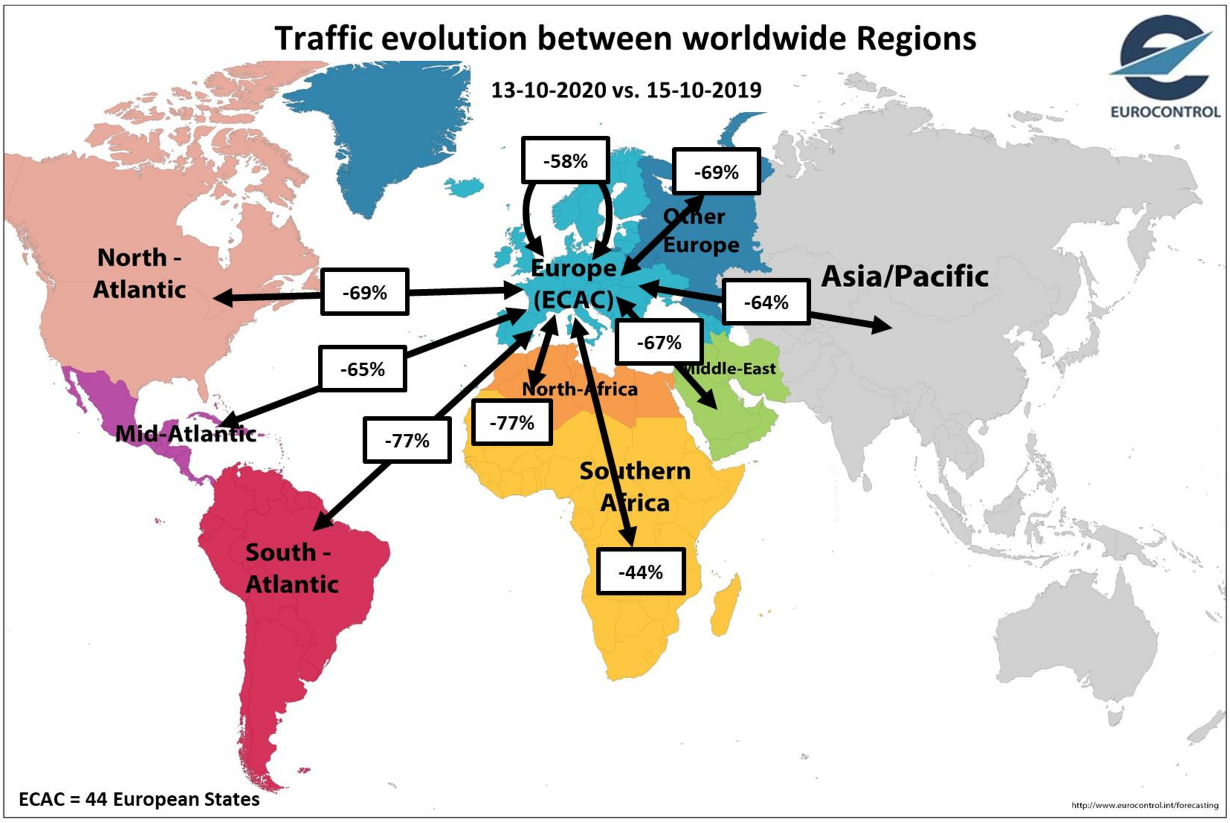
- Business Aviation recovery has been gaining pace since early October (reaching -10% vs. 2019) while all-cargo remains stable at 2019 levels (+3%).
- Low-cost flights recorded a faster recovery during the summer but decreased early September and even more in October with -66% vs 2019. Charter flights increased since October reaching -37%.

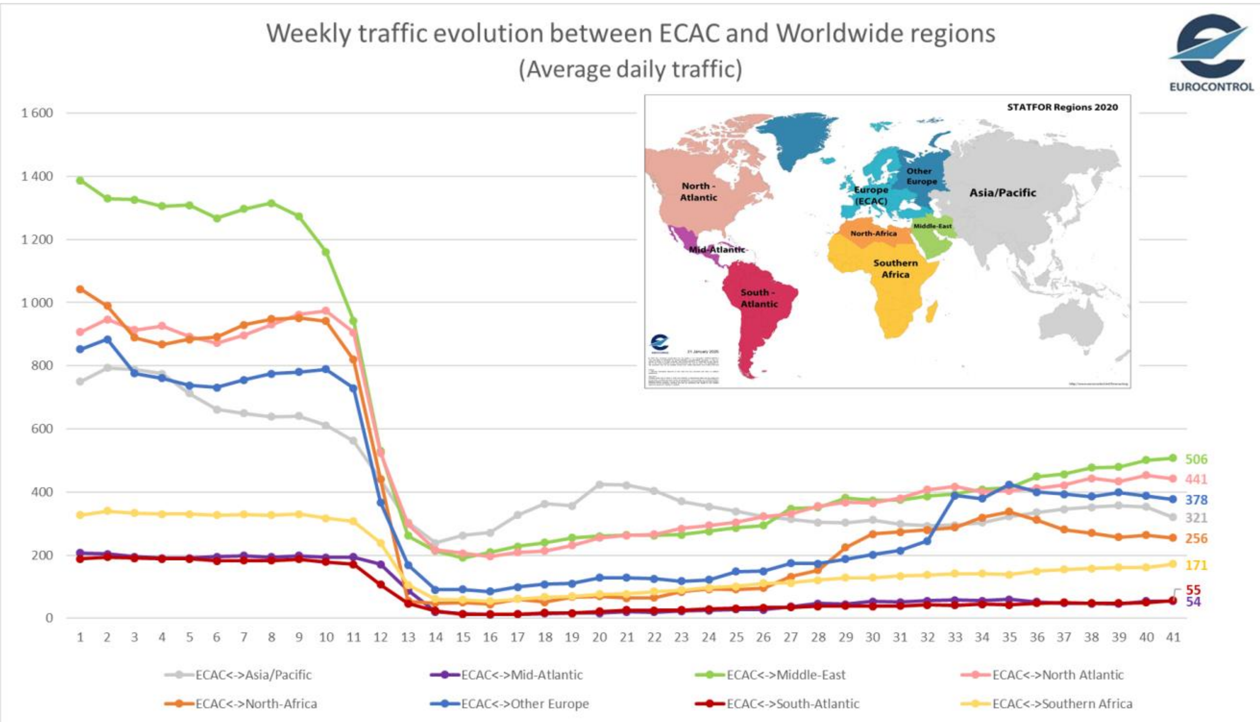


2. Traffic Flows & Country Pairs

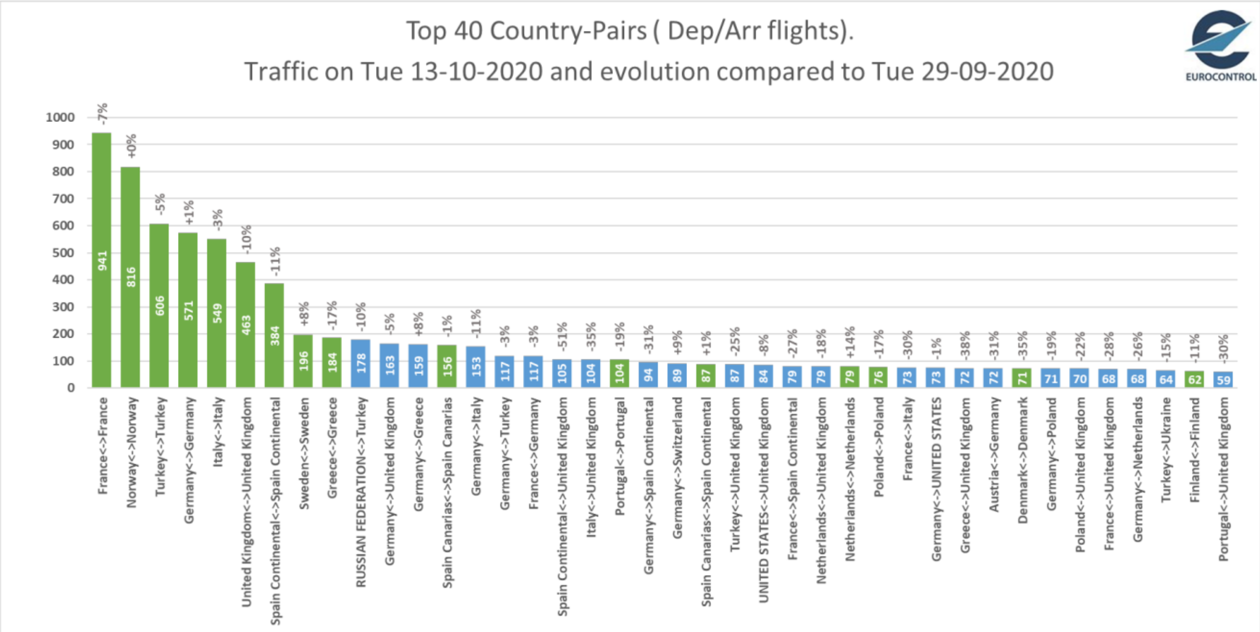
- The main traffic flow is the intra-Europe flow with 10,469 flights on Tuesday 13 October, which is decreasing (-12%) compared to Tuesday 29 September.
- The top traffic flows with Europe were with "Middle-East" (466 flights, +3%) followed by "North-Atlantic" (387 flights, -5%), "Other Europe" (333 flights, -7%), "Asia/Pacific" (293 flights, -6%) and "North-Africa" (207 flights, -1%).
- Intra-Europe flights are at -58% compared to 2019 while all other flows are at -68%.

REGION	29-09-2020	13-10-2020	%	vs. 2019
Intra-Europe	**11 885**	**10 469**	***-12%***	***-58%***
Europe<->Asia/Pacific	312	293	*-6%*	*-64%*
Europe<->Mid-Atlantic	35	48	*+37%*	*-65%*
Europe<->Middle-East	454	466	*+3%*	*-67%*
Europe<->North Atlantic	407	387	*-5%*	*-69%*
Europe<->North-Africa	209	207	*-1%*	*-77%*
Europe<->Other Europe	359	333	*-7%*	*-69%*
Europe<->South-Atlantic	35	45	*+29%*	*-77%*
Europe<->Southern Africa	155	172	*+11%*	*-44%*
Non Intra-Europe	**1 966**	**1 951**	***-1%***	***-68%***


Traffic evolution between worldwide Regions
13-10-2020 vs. 15-10-2019
EUROCONTROL
-58%
-69%
Other Europe
Europe (ECAC)
North - Atlantic
-69%
Asia/Pacific
-64%
-67%
Middle-East
-65%
North-Africa
-77%
Mid-Atlantic
-77%
Southern Africa
South - Atlantic
-44%
ECAC = 44 European States
http://www.eurocontrol.int/forecasting


Weekly traffic evolution between ECAC and Worldwide regions
(Average daily traffic)
EUROCONTROL
STATFOR Regions 2020
North - Atlantic
Other Europe
Europe (ECAC)
Asia/Pacific
North-Africa
Middle-East
Mid-Atlantic
Southern Africa
South - Atlantic
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
506
441
378
321
256
171
55
54
ECAC<->Asia/Pacific
ECAC<->Mid-Atlantic
ECAC<->Middle-East
ECAC<->North Atlantic
ECAC<->North-Africa
ECAC<->Other Europe
ECAC<->South-Atlantic
ECAC<->Southern Africa

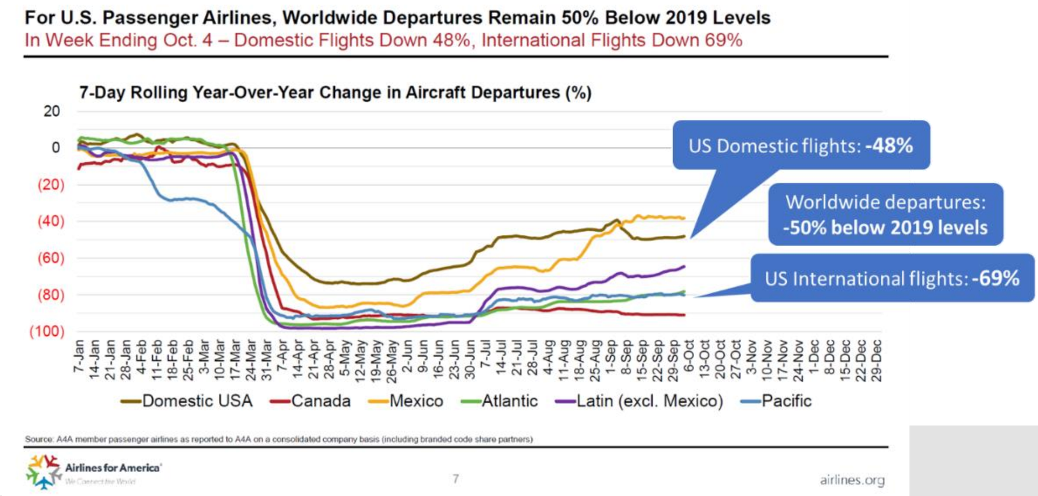
- Domestic flows are the most active flows (i.e. 9 of the top 10 flows are domestic). From the top domestic flows, only Sweden (+8%) and Germany showed an increase (+1%). All other domestic flows decreased like in Greece (-17%), Spain (-11%), the UK (-10%), France (-7%), Turkey (-5%) and Italy (-3%).



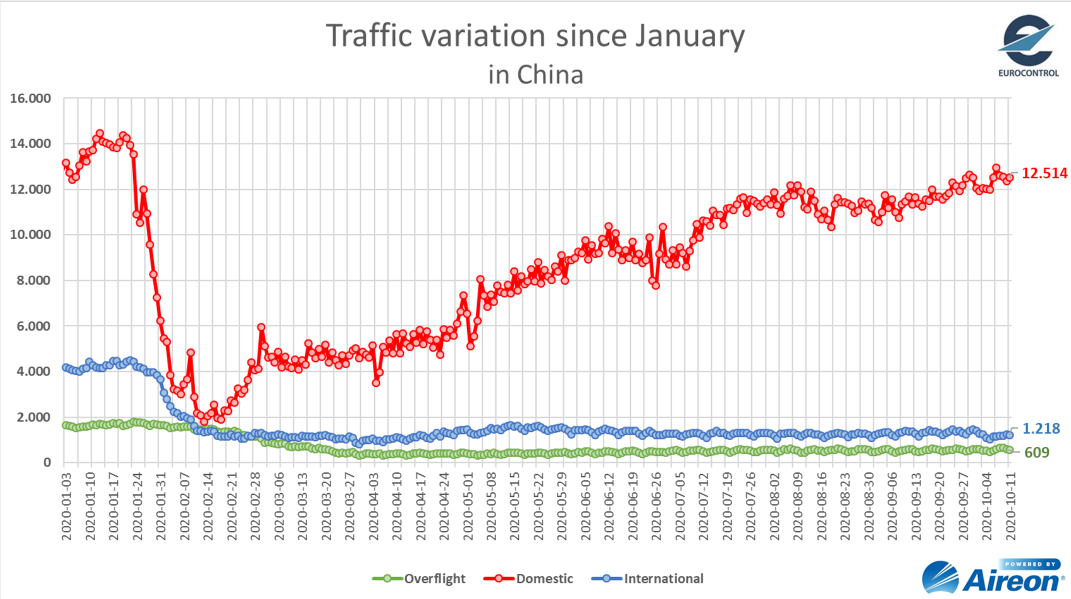
- The busiest non domestic flows were Turkey-Russia (178 flights, -10%) followed by Germany-UK (163 flights, -5%), Germany-Greece (159 flights +8%) and Germany-Italy (153, -11%).

3. Situation outside Europe

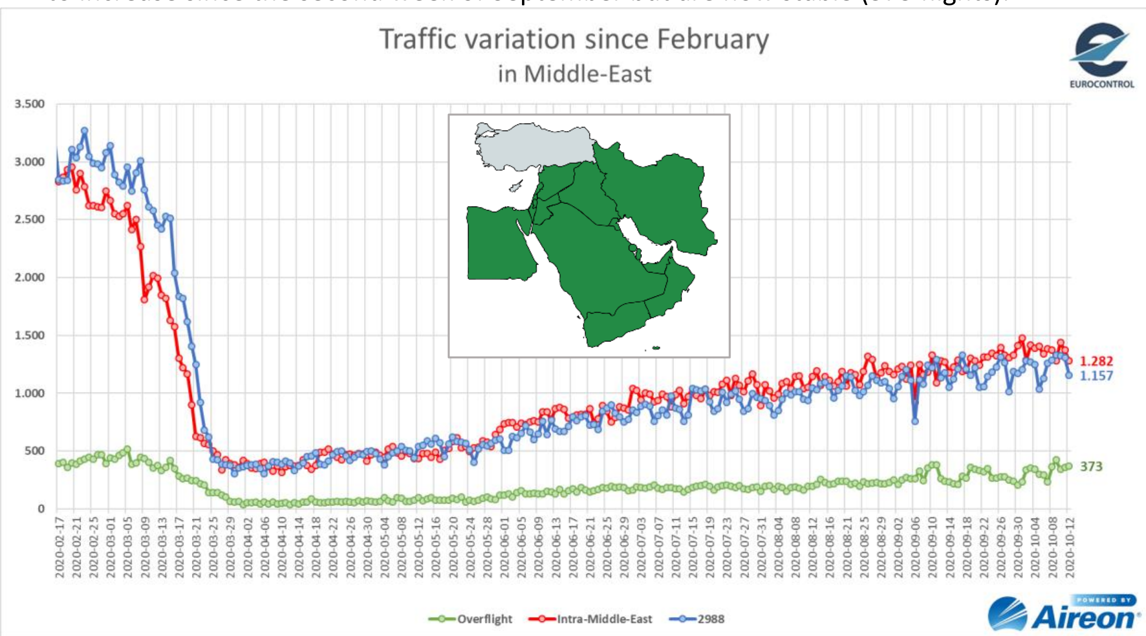
- **United-States:**
  - US domestic traffic has improved since early June with a noticeable step change on 1st July. After a decrease early September, the domestic flow is now stable at -48% of 2019. International flows slightly increased to -69% except flows to/from Mexico (around -39%).
  - In week ending Oct 4, U.S. airlines passenger volumes remained 65% below year-ago levels with Domestic Air Travel down 63% and International down 81%.
  - The domestic U.S. Load Factor averaged 57% in most recent week, versus 82% a year earlier.



- **China:**
  - Chinese domestic flights are now stable with 12,514 flights, back pre-COVID levels. The number of International flights has been stable since March (with 1,218 flights, i.e. still 70% below pre-COVID levels). The same is true for overflights (609).



- **Middle East:**
  - Since the beginning of April, Intra-Middle-East traffic has been increasing slowly reaching 1,282 flights on 12 October. International traffic has been recovering at the same levels as domestic from early April but is slightly lagging behind (1,157 flights). Overflights have started to increase since the second week of September but are now stable (373 flights).

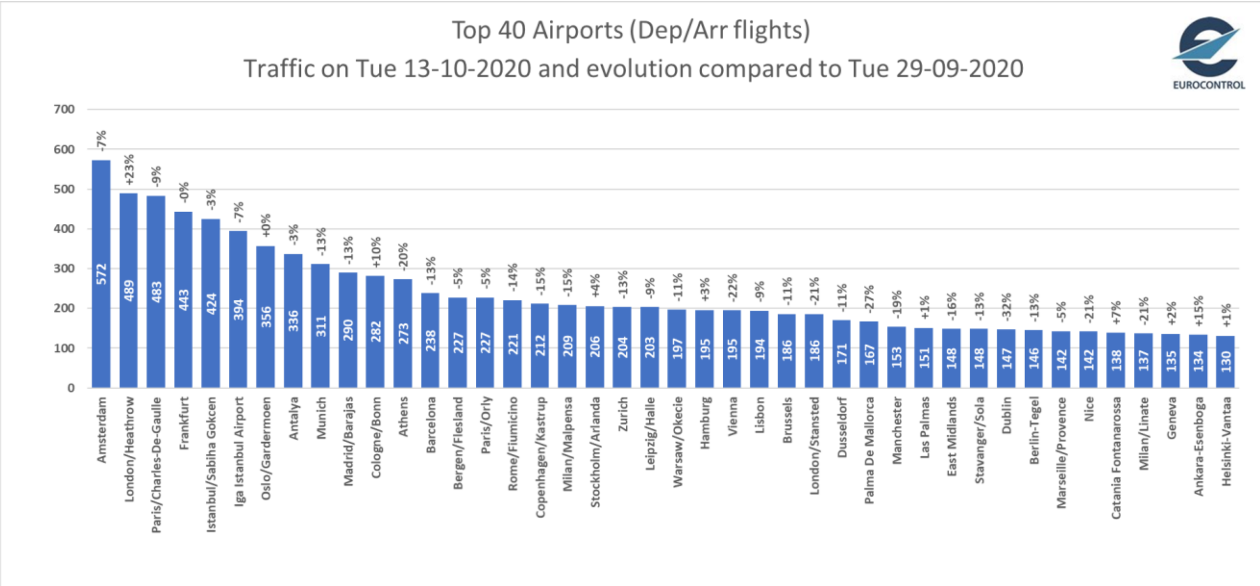


News for worldwide airlines and ANSPs:

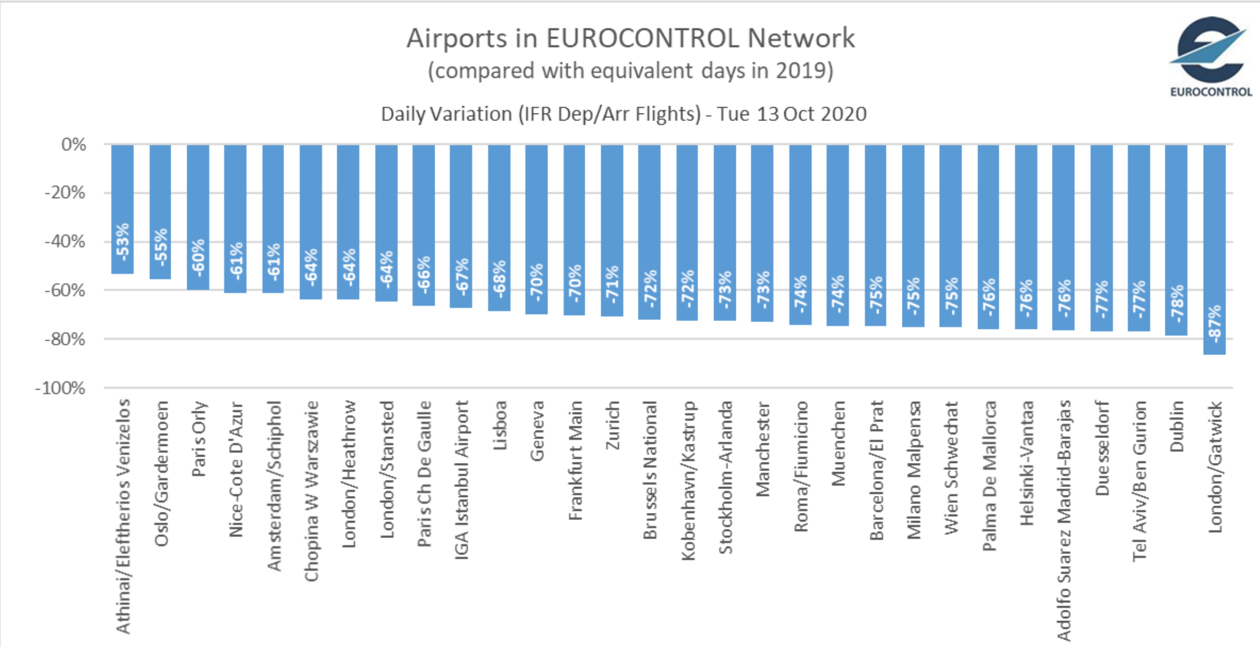
- **Japan Airlines** reducing planned international frequencies by 82% in November and by 78% in December and January; reports domestic frequencies have recovered to 70%.
- **Qatar Airways** plans to launch service to San Francisco in December.
- **Air India** planning additional services to the UK in the New Year.
- **Etihad** has removed its A380 aircraft from its schedule out to September 2021.

4. Airport Information

- Amsterdam was the busiest airport with 572 Dep/Arr flights on 13 October (-7% over the last 2 weeks), followed by London/Heathrow (489, +23%), Paris CDG (483, -9%), Frankfurt (443, -0%), Istanbul/Sabiha (424, -3%), İGA Istanbul Airport (394, -7%), Oslo (356, +0%), Antalya (336, -3%), Munich (311, -13%) and Madrid (290, -13%).
- From the top 10 airports, only London/Heathrow (+23%) presented an increase over 2 weeks. Most airports reported a decrease like Munich (-13%), Madrid (-13%), Paris CDG (-9%), Amsterdam (-7%), İGA Istanbul Airport (-7%), Istanbul/Sabiha (-3%) and Antalya (-3%). Frankfurt was stable while Athens and Barcelona experienced a significant decrease with -20% and -13% respectively.



- Compared to 2019, Athens operated at -53% on 13 October, Amsterdam (-61%), London Heathrow (-64%), Paris CDG (-66%), İGA Istanbul Airport (-67%), Frankfurt (-70%), Roma (-74%) and Madrid (-76%).

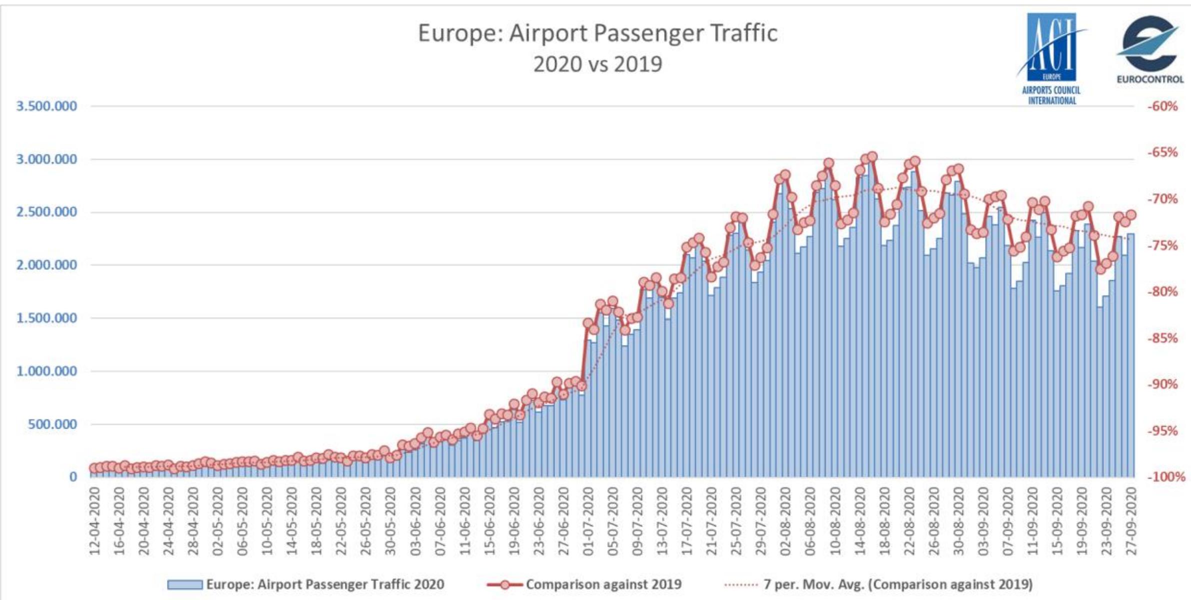


News from European airports:

- **Geneva Airport** pax down 79% in September (-64% for Q3); Zurich pax down 81% for September.
- **Copenhagen Airport** reports for September pax down 83% year-on-year and aircraft movements down 65%.

Passengers:

- According to **ACI**, passenger traffic has remained stable in the Summer at -69% over August compared to August 2019. On Sunday 27 September, ACI reported 2.3 million passengers compared to 8.1 on Sunday 29 September 2019 (i.e. -72%). Overall, since January 2020, passenger are down by 80% with a loss of 1.3M passengers.

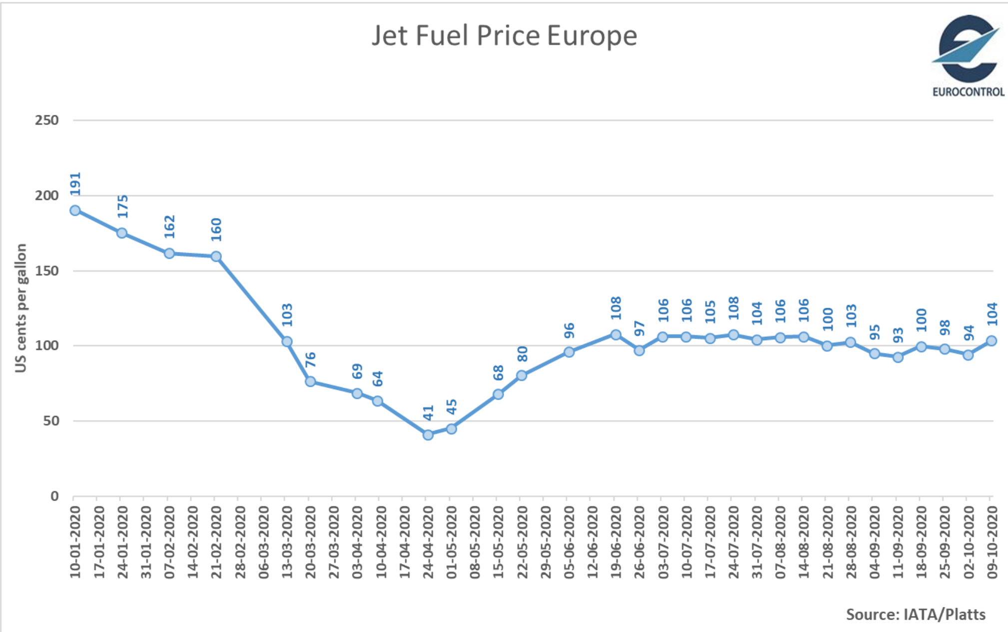


5. Economic, other factors

- **En-route air navigation charges:** After a bottom of 73M€ for April flights (i.e. -89% compared to plan), the amount billed for en-route charges reached 287M€ for September flights (-61% compared to plan) after a top 330M€ for August flights.

Route Charges	Mid-Feb. billing	Mid-Mar. billing	Mid-Apr. billing	Mid-May billing	Mid-Jun. billing	Mid-Jul. billing	Mid-Aug. billing	Mid-Sept. billing	Mid-Oct. billing
Total net chargeable amounts (VAT excl.)	547 M€	516 M€	357 M€	73 M€	95 M€	120 M€	255M€	330M€	287M€

- **Fuel Price:** After having remained stable slightly above 100 cts/gal since early July, fuel price reached 104cts/gal on 9 October 2020.



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.