Tuesday, 03 November 2020

Turkey

Loss of flights
-0.49M (-64%)
Dep/Arr flights vs. 2019 since 1st March

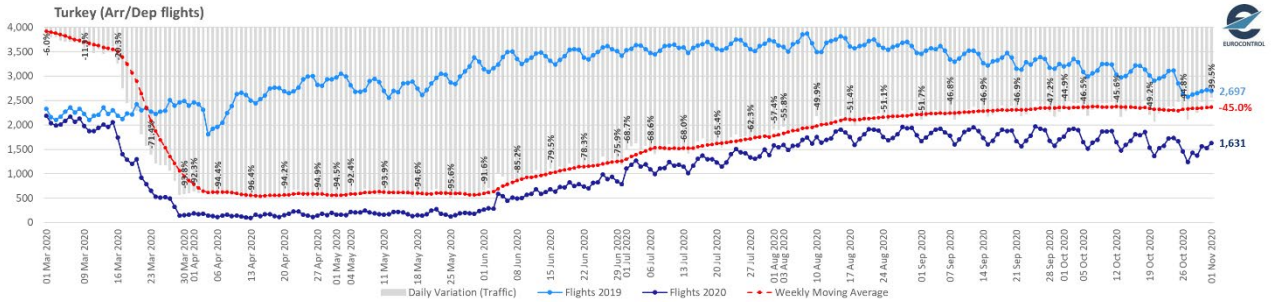
Total economy GDP[2]
-2.8%
2020 vs. 2019

Key facts:
Flights last week vs. 2019:

- IGA Istanbul -55%
- Istanbul SG -34%
- Turkish Airlines -50%
- Pegasus -30%
- SunExpress -48%
- Domestic flows -29%
- European flows -44%

Loss of Passengers[1]
-99M (-74%)
March-September, 2020 vs. 2019

Unemployment[3]
-0.5%
At end July



- **COVID Crisis/Economy:** Turkey ranks 21st worldwide in terms of COVID deaths[4]. Impact on the economy is somewhat contained with an expected GDP decrease in 2020 of -2.8% and unemployment actually reducing.
- **Traffic:** Traffic stayed below -90% of 2019 levels in April and May reaching -95% mid-April. In June it started and gradual and steady recovery which, contrary to other European countries, continued in September peaking on 25 September with 1,971 flights, only to stabilize in October at around -45%. Overall, in terms of traffic loss, Turkey ranks 6th in Europe with -0.49M flights and -99M passengers lost.
- **Airports:** IGA Istanbul is the top airport in Turkey with 520 average movements per day over the last week (-55% compared to last year), followed by Istanbul SG (-34%) overtaking Antalya as second top airport. In the same week, Istanbul Ataturk experienced an increase of +35% due mostly to business aviation.
- **Aircraft Operators:** Turkish remains the top airline operating at -50% last week, with Pegasus operating at -30% and SunExpress at -48%. The three airlines ramped up operations as of 1 June. Turkish and Pegasus continued increasing through July and August stabilizing at end-of-August levels. SunExpress stabilized earlier at end-of-June levels.
- **Market segments:** All cargo significantly increased (~+40% in May/June). Business aviation was affected but recovered steadily (+24% in September). The other segments were strongly hit and are recovering slowly.
- **Traffic flows:** Domestic flows remain the top flows (-29% over 2019). Russia replaces Germany (now third) as second main flow. Top non-ECAC flows are with Europe (non-ECAC), Middle-East and Asia-Pacific.

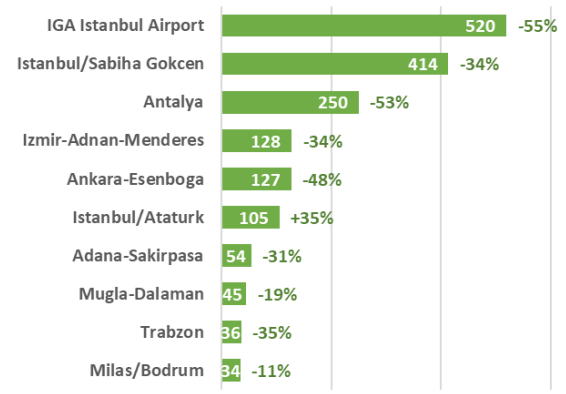
COVID-19 Impact on EUROCONTROL Member States

EUROCONTROL Briefing

TURKEY - Top 10 Airports

Week from 26-Oct-2020 to 01-Nov-2020

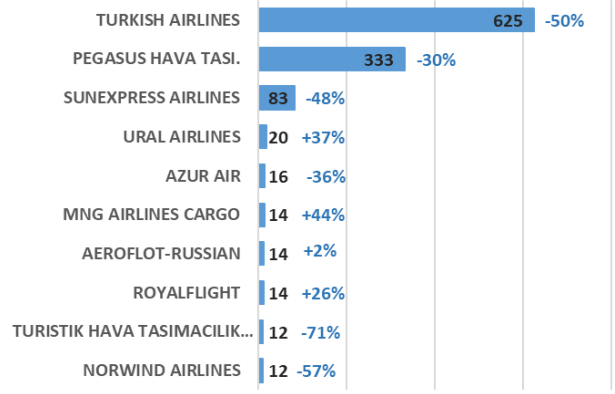
avg daily movements (dep+arr) and % vs. 2019



TURKEY - Top 10 Aircraft Operators

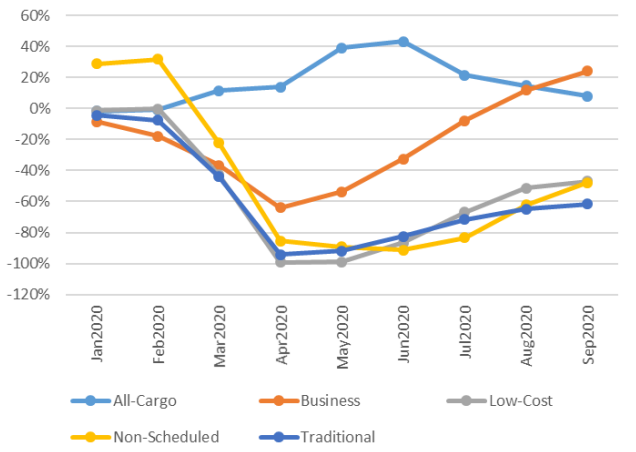
Week from 26-Oct-2020 to 01-Nov-2020

avg daily flights (dep/arr) and % vs. 2019



TURKEY - Market Segments

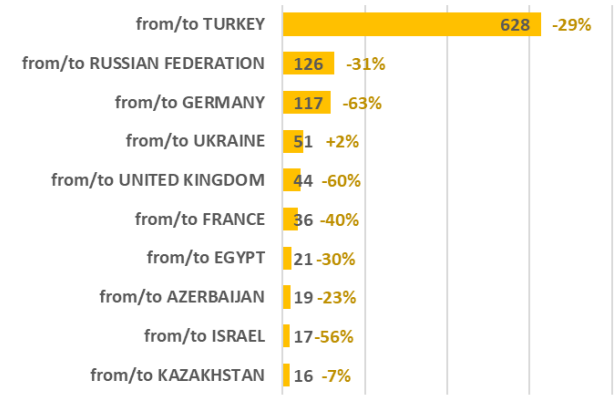
Monthly variation % vs 2019



TURKEY - Top 10 Country Pairs

Week from 26-Oct-2020 to 01-Nov-2020

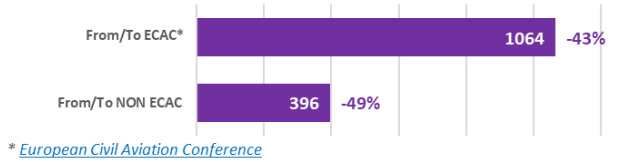
avg daily flights (dep/arr) and % vs. 2019



TURKEY - Top Region Pairs

Week from 26-Oct-2020 to 01-Nov-2020

avg daily flights (dep/arr) and % vs. 2019

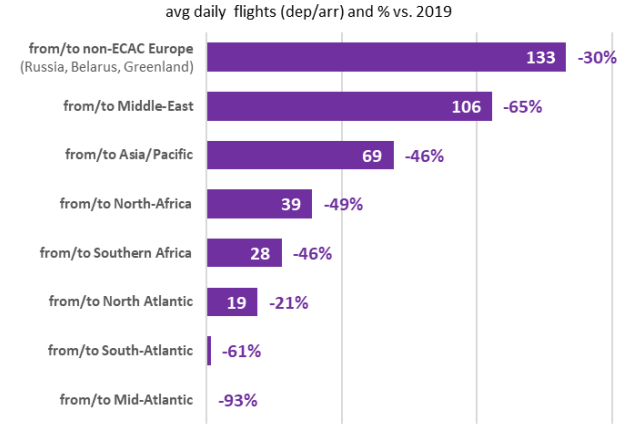


* European Civil Aviation Conference

TURKEY - Top Region Pairs

Week from 26-Oct-2020 to 01-Nov-2020

avg daily flights (dep/arr) and % vs. 2019



SUPPORTING EUROPEAN AVIATION

Data Sources:

[1] *DHMI*

[2] *Oxford Economics (16 October 2020)*

[3] *TURKSTAT*

[4] *John Hopkins University*

Contacts:

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