

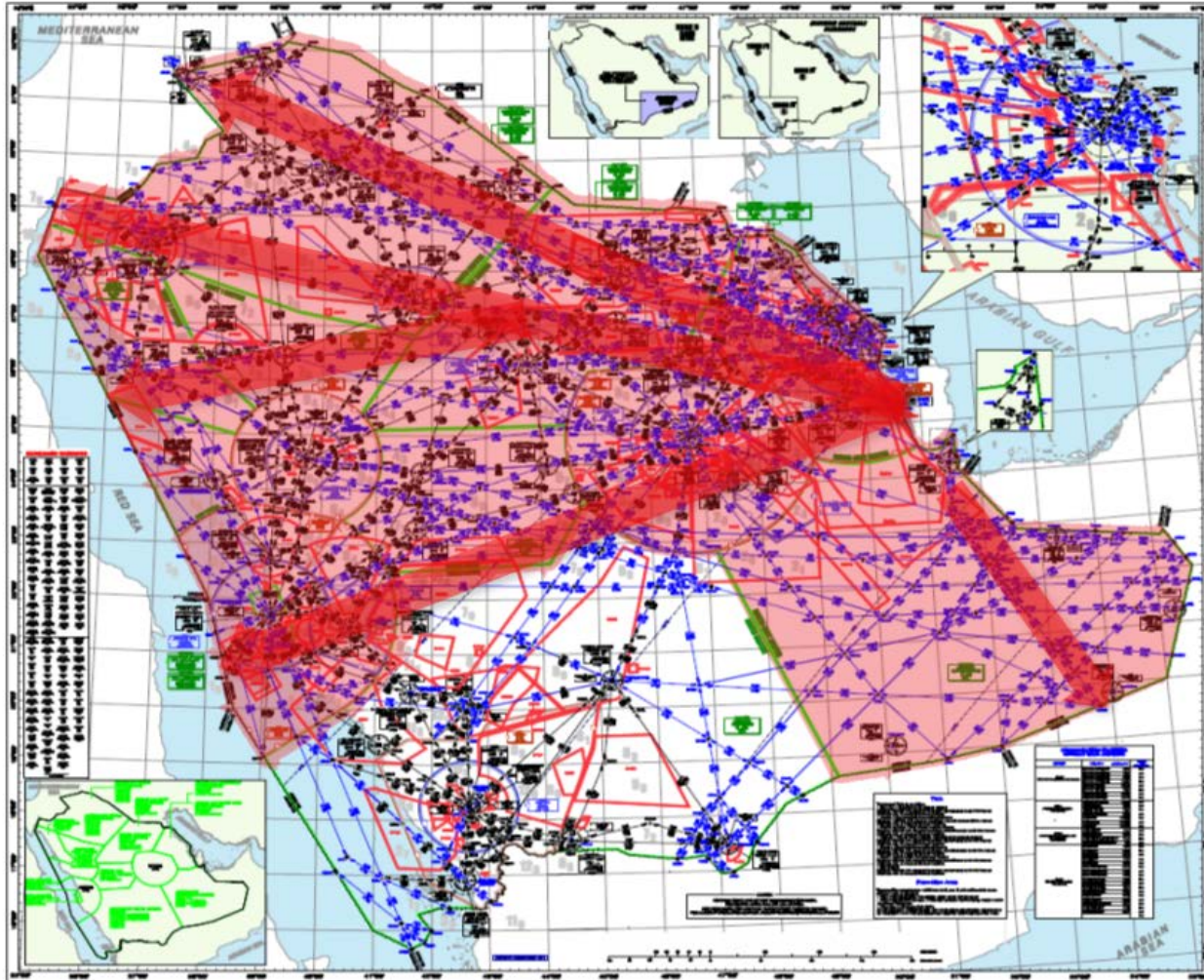


Traffic Flow Key Highlights

For FEB 2021

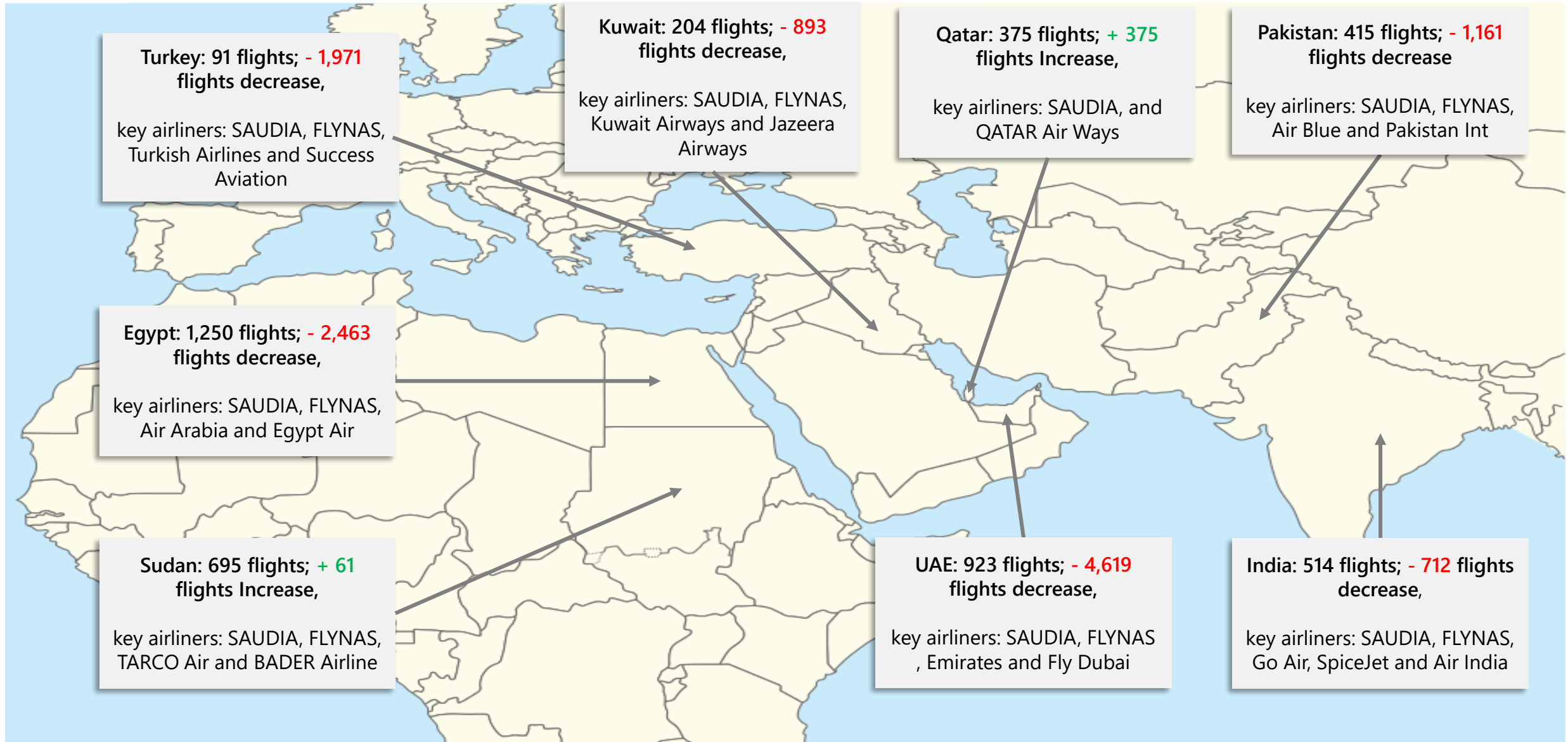
SANS | ATFM

26 May 2021

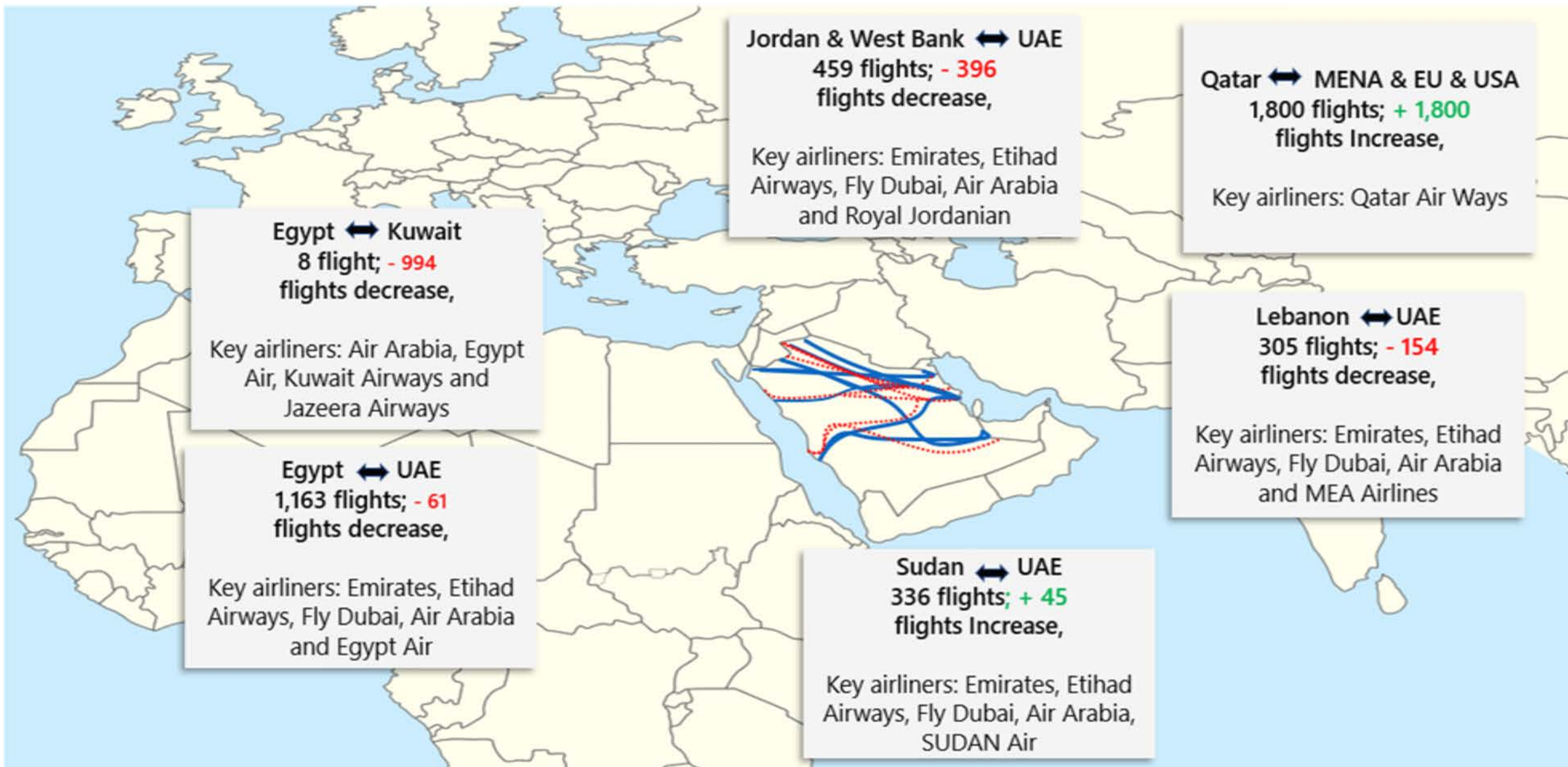


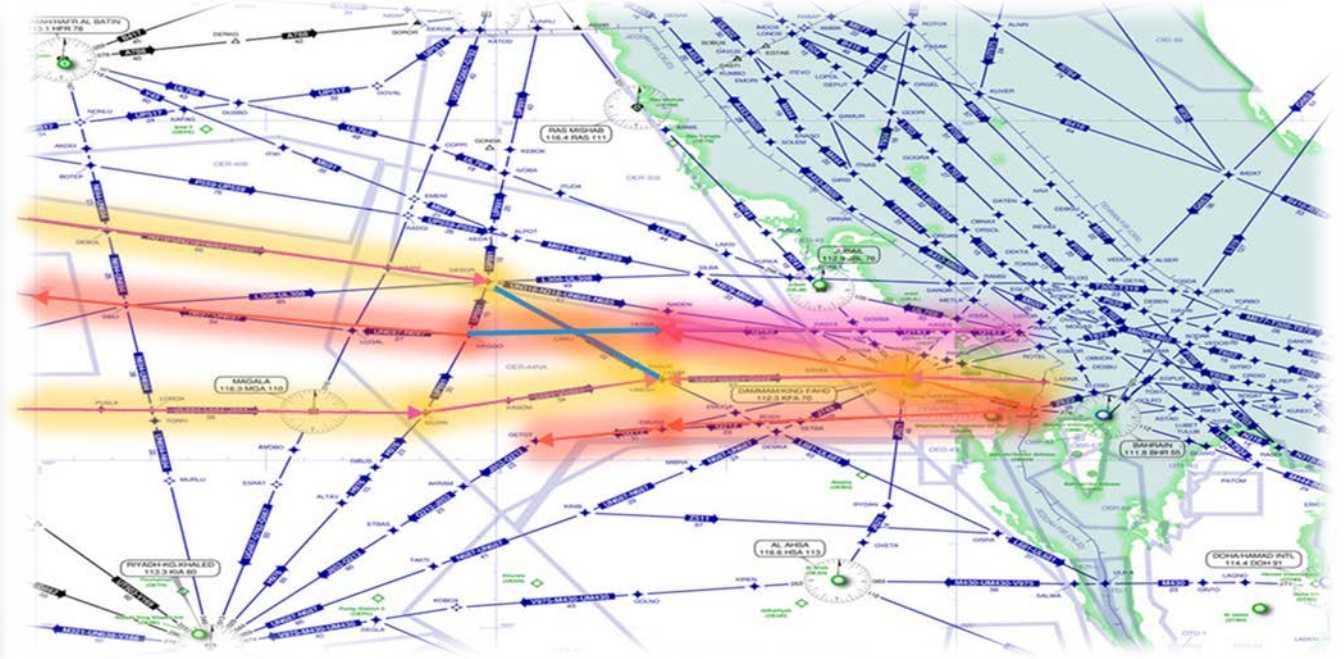
- Positive growth in recovery rate has resumed in MAR, most notably on the OVF segment, where flow levels are now on par with 2019, and the daily average flight rate continues to increase.
- International flights have expanded compared to February however remain at the same level or lesser compared to January.
- Overflights have expanded significantly compared to the last two months led by UAE and Qatar Ops on European, USA, and MENA routes. The segment has recovered to its Y19 level as of Q1.

Major sources for international in March 2021(Compared to March Y19)



Major sources for Overflights in March 2021 (Compared to March Y19)





- The highly expect en-route sector to be impacted is the northeast area.
- Traffic flows expected to be from east to west vise versa
- Caution for traffic landing and departing ((OEDF, OBXX, and OTXX))

Actuals vs. LY vs. COVID refreshed scenarios



YTD VS. Y19 YTD



YTD VS. COVID FCST YTD



- The forecast above is one of the expect scenarios to have based on many factors as follows scenario and actuals are likely to expand over upcoming months if no major pickup inflows were observed; this is subject to COVID, border control, capacity, and airliner's financial standing developments.
- Data is collected from different sources ICAO, IATA, historical data and airlines.
- Expected to support making decisions on operational level and financial as well.

Actuals vs. LY vs. COVID refreshed scenarios



YTD VS. Y19 YTD

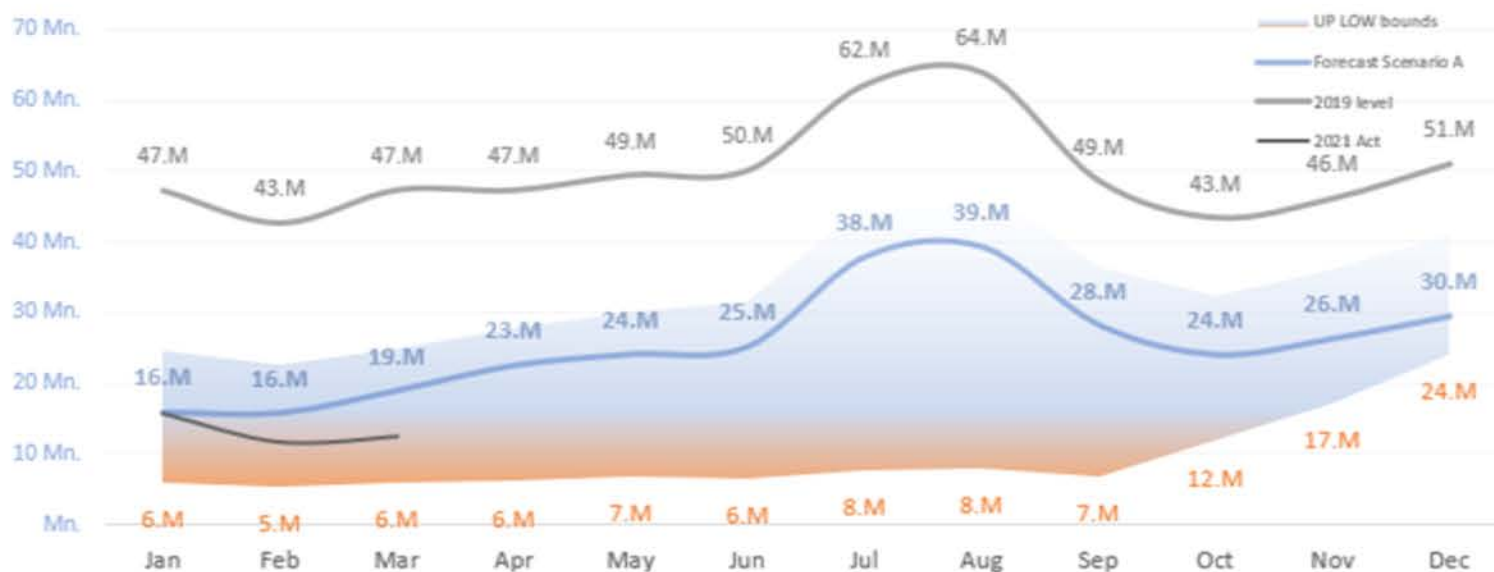


YTD VS. COVID FCST YTD



- Overflight's actuals remains significantly above their projections, mainly driven by unfactored historical growth for business and freighter segments and resummptions of QTR flows over Saudi FIR. (> than FCST Scenario A YTD by + 46%, ~ + 8,000 flights).
- Sustained growth in Qatar and UAE hub flows to and from EU / North America hubs, notably on Spain routes.
- Qatar Airways flights represent 21% of total schedule overflights in Q1 2021.

Actuals vs. LY vs. COVID refreshed scenarios



YTD VS. Y19 YTD



YTD VS. COVID FCST YTD



- International flows remained below their projections subject to high uncertainties related to travel and borders policies regionally and locally. Developments will be tracked over MAY as inbound, and outbound flows restrictions are expected to be eased (< than FCST Scenario A YTD by - 19%, ~ - 5,000 flights).

Actuals vs. LY vs. COVID refreshed scenarios



YTD VS. Y19 YTD



YTD VS. COVID FCST YTD



- The number of operated Domestic city Pairs/Routes has not experienced any major increase for the past three months. Remain limited to ~ 140, growth is subject to more capacity deployment in sub-network routing over summer period(< than FCST Scenario A YTD by - 13 %, ~ - 7,000 flights).
- The domestic operation return to meet the situation in 2019 and expected to be recovered by the first quarter of 2022 depending on the applied restrictions and situation.

- Brief ATCO's of the expected flow,
 - Plan before approving higher level on request,
 - Recognize ACFT type and cruising level,
 - Activation of planner positions,
 - Enhance coordination to reduce ATCO's workload,
 - Maintain sector capacity monitoring for better management,
 - Coordinate to predict the traffic flow with flow management section
- Ensure training in simulators for the expected traffic growth
 - Emphasis during competency check to highlight hotspot and bottlenecks to ATCO
 - Further review and update LOA's if needed
 - Enhance coordination with military section for operation activity
 - Work on strategic solution to facilitate traffic ensuring review to airways and waypoint on boundary

- [EUROCONTROL Comprehensive Flows Assessment 08th APR 2021](#)
- [EUROCONTROL EU traffic recovery tracking dashboard](#)
- [ICAO Airports status and NOTAM tracker \(COVID live tracker\)](#)
- [ICAO COVID impact analysis \(revised on weekly basis\)](#)
- [ICAO COVID-19 Air Traffic Dashboard suite](#)
- [OAG Airlines Deployed capacity report brief \(till AUG 2021, Including Saudi Arabia\)](#)
- [Global capacity tracker from RoutesOnline.com](#)
- [Mckinsey Travel recovery insights portal](#)
- [Tracking COVID vaccination rate](#)

- IATA
 - [State of the region MENA and Africa MAR 2021](#)
 - [Air passenger market analysis \(FEB 2021\)](#)
 - [Air Cargo Market analysis \(FEB 2021\)](#)
 - [Airliners financial monitor \(JAN21 – FEB21\)](#)
 - [Airline business confidence index \(JAN21\)](#)
 - Revised Air travel outlook (updated analysis [here](#) – FEB21)

***Thank you
Stay safe
and
ensure precautionary measures***

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