



Organización de Aviación Civil Internacional
Oficina Regional Sudamericana

**Cuarta Reunión Virtual de Directores Generales de Aviación Civil de la
Región Sudamericana sobre la Respuesta al COVID-19**

(Plataforma Zoom, 11 de diciembre de 2020)

RV4/DGAC - IP/03

08/12/2020

**Agenda Item 1: Review of the status of the Region and of CRRIC activities and SAM
Strategic Framework in response to COVID-19**

EVOLUTION OF AIR TRAFFIC IN THE REGION AS OF NOVEMBER/2020

(Presented by the Secretariat)

SUMMARY

This information paper aims to present an updated analysis of the air traffic in the region after the beginning of the COVID-19 pandemic.

1. INTRODUCTION

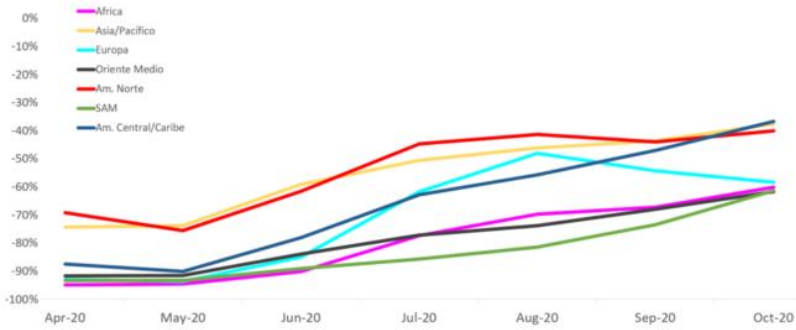
1.1 The effects of COVID-19 on aviation were felt since the beginning of the pandemic. After coming to an almost halt in a matter of days, the aviation system started its path for recovery. Although there is still a long way to get back to the traffic levels experienced by the SAM region prior to the pandemic, the traffic in the region has been increasing since this strong initial decrease. This information paper wishes to present a few statistics of this trend in the region since that moment.

2. ANALYSIS

2.1 This information paper will focus mainly on the quantity of seats offered by airlines during this period (seat capacity). Although this metric has its limitations, as for example it does not reflect the load factor or aircraft size, it is a simple way to depict the level of operation of the airlines, and, indirectly, the traffic on airports and airspace.

2.2 Figure 1 below shows the evolution of seat capacity by region since April/2020, considering domestic and international traffic in aggregate. It is possible to see that, although the impacts were felt in all regions of the world, they did not follow the same pattern in every part of the globe at the same time. The SAM region has experienced the impacts of the pandemic with great intensity, and during several months, and in a similar manner the aviation sector has been impacted. In spite of that, although slowly, traffic in the region has increased every month since April. There is still a long way to return to previous traffic levels, but it is relevant to note that from the point of lowest traffic until the most recent records, the capacity offered by airlines in the region has already increased five-fold.

Figure 1 – Seat capacity per region (in comparison to 2019)

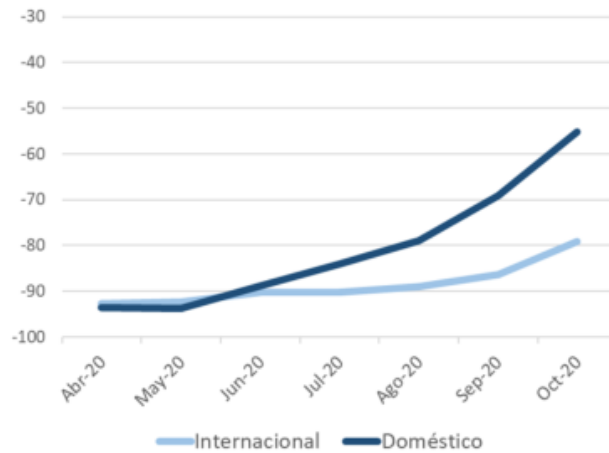


Source: ICAO and Flightaware ADS-B (<https://data.icao.int/covid-19>)

2.3 It is also important to note that in the most recent months, especially in September and October, the rate of recovery has increased, reflecting the actions adopted by the states in regards to aviation. For November, although complete data is not yet available, the tendency indicates a continued move in the same direction.

2.4 Due to the greater restrictions to international travel, the recovery of domestic aviation has been faster all around the world, and our region is no exception. Figure 2 shows the comparison between domestic and international traffic in the region. It is also possible to see the increased rate of recovery in the most recent months, for both the domestic and international segments. It is also relevant to note that air transport within the SAM region accounts for 85% of the total traffic (based on 2019 data), with domestic traffic corresponding to almost 74% of the overall traffic and international intra-regional flights being responsible for 11% of the capacity offered.

Figure 2 – Seats capacity in the domestic and international markets (% in comparison to 2019)



Source: ICAO and Flightaware ADS-B (<https://data.icao.int/covid-19>)

2.5 Regarding the perspective for traffic growth for the next months, Table 1 below shows the estimations calculated by ICAO based on different theoretical scenarios¹. Due to the inherent uncertainties, these scenarios may vary substantially over time, but the current estimations indicate that a continued growth is expected. Apart from the theoretical estimations, other important factors can influence the growth

¹ Effects of Novel Coronavirus (COVID-19) on Civil Aviation: Economic Impact Analysis (ICAO) https://www.icao.int/sustainability/Documents/COVID-19/ICAO_Coronavirus_Econ_Impact.pdf

in traffic, such as the passenger demand, the evolution of the pandemic in the region, the availability of vaccines and the actions adopted by States.

Table 1 – Expected scenarios for seat capacity growth on the following quarters (compared to baseline)

	International	Domestic	Total
2Q2020	-92%	-89%	-90%
3Q2020	-80%	-70%	-73%
4Q2020	-61 to -62%	-43%	-49%
1Q2021	-42 to -51%	-26 to -34%	-31 to -40%
2Q2021	-25 to -45%	-13 to -30%	-17 to -35%

Source: Effects of Novel Coronavirus (COVID-19) on Civil Aviation: Economic Impact Analysis (ICAO)

3. SUGGESTED ACTION

3.1 The Fourth Virtual Meeting of Civil Aviation General Directors of the South American Region on the Response to COVID-19 is invited to take note of the contents of this information paper.

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