

TAKEOFF

Data Insights on the World's Major Airlines



February 2025



ABOUT OAG TAKEOFF

Takeoff provides key performance insights and analysis of the world's top 20 major airlines.

Including:

- **Capacity Trends:** A review of airline capacity in 2023 and 2024, offering insights into growth and recovery patterns.
- **Operational Insights:** Breakdown of domestic and international capacity share, frequency and ASKs (Available Seat Kilometers) at each airline.
- **Routes Operated:** Data on the number of routes operated in 2024 and a year-on-year comparison.
- **Market Insights:** The share of the airline's capacity by regions and country markets.
- **Key Airports:** Highlights the top 5 airports for each airline based on capacity.
- **Flight Routes:** The top 5 domestic and international flight routes (by capacity) operated by each airline.
- **Fleet Metrics:** Includes data on fleet composition and usage for the top airlines.
- **Average Airfares:** Includes average 2024 economy cabin prices for domestic and international flights at departure.

Methodology

- Data is for the full year of 2024 (January to December) and often has comparisons to 2023 and 2019 data (where appropriate to illustrate growth compared to pre-Covid levels).
- Number of routes served is over the full year of 2024 subject to a minimum frequency of one flight per week.
- Frequency is the number of scheduled one-way flights.
- Airline capacity and frequency data is sourced from OAG's Schedules Analyser.
- Airfare data is sourced from OAG's Airfare Data and is the average cabin economy USD price at departure.
- Fleet data is sourced from ch-aviation.
- The top 5 airports for each airline are ranked by the number of seats in 2024.



OVERVIEW OF THE WORLD'S MAJOR AIRLINES

Capacity Growth Year-on-Year

Airline	Airline Name	2023	2024	Growth 24 vs 23
AA	American Airlines	258,624,495	275,483,887	6.5%
DL	Delta Air Lines	229,441,720	239,908,388	4.6%
WN	Southwest Airlines	233,165,693	231,418,133	-0.7%
UA	United Airlines	200,745,304	212,889,710	6.0%
FR	Ryanair	191,898,798	209,613,290	9.2%
CZ	China Southern Airlines	145,091,575	148,850,573	2.6%
MU	China Eastern Airlines	136,399,095	145,781,551	6.9%
6E	IndiGo	122,554,586	134,922,816	10.1%
CA	Air China	107,165,646	115,882,868	8.1%
U2	easyJet	97,173,350	102,499,409	5.5%
LA	LATAM Airlines Group	93,443,148	101,265,632	8.4%
TK	Turkish Airlines	81,727,875	81,554,404	-0.2%
LH	Deutsche Lufthansa AG	70,439,581	75,024,876	6.5%
EK	Emirates	68,255,758	71,751,102	5.1%
NH	All Nippon Airways	62,980,030	64,399,223	2.3%
AS	Alaska Airlines	55,423,434	57,754,847	4.2%
BA	British Airways	55,207,238	57,670,691	4.5%
AC	Air Canada	54,908,135	57,157,408	4.1%
QR	Qatar Airways	50,150,546	55,369,527	10.4%
NK	Spirit Airlines	55,584,728	55,304,168	-0.5%

Flight Frequency Growth Year-on-Year *Total number of scheduled one-way flights

Airline	Airline Name	2023	2024	Growth 24 vs 23
AA	American Airlines	2,011,460	2,177,424	8.3%
DL	Delta Air Lines	1,644,906	1,713,537	4.2%
UA	United Airlines	1,526,202	1,618,842	6.1%
WN	Southwest Airlines	1,470,323	1,452,219	-1.2%
FR	Ryanair	1,013,352	1,098,831	8.4%
MU	China Eastern Airlines	818,545	872,723	6.6%
CZ	China Southern Airlines	804,113	828,452	3.0%
6E	IndiGo	682,615	749,156	9.7%
CA	Air China	575,710	622,505	8.1%
U2	easyJet	544,468	569,588	4.6%
LA	LATAM Airlines Group	517,153	553,191	7.0%
AS	Alaska Airlines	409,171	434,657	6.2%
LH	Deutsche Lufthansa AG	419,173	421,254	0.5%
TK	Turkish Airlines	402,898	398,681	-1.0%
AC	Air Canada	378,942	385,765	1.8%
NH	All Nippon Airways	320,913	320,042	-0.3%
BA	British Airways	299,710	310,518	3.6%
NK	Spirit Airlines	300,569	291,178	-3.1%
QR	Qatar Airways	184,330	200,385	8.7%
EK	Emirates	165,430	172,445	4.2%

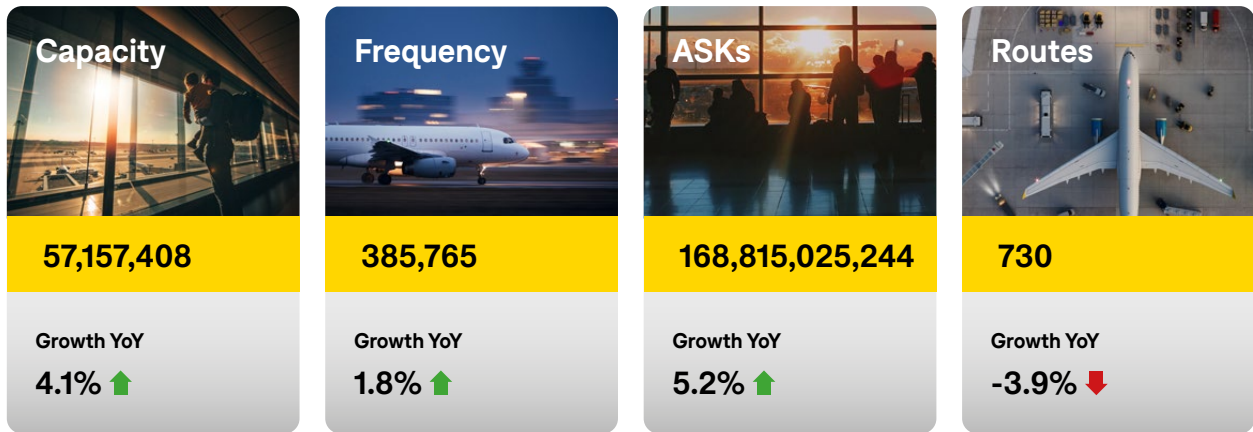
ASKs (Available Seat Kilometers) Growth Year-on-Year

Airline	Airline Name	2023	2024	Growth 24 vs 23
UA	United Airlines	474,553,710,096	507,096,590,281	6.9%
AA	American Airlines	449,494,822,474	475,437,117,209	5.8%
DL	Delta Air Lines	441,738,781,160	467,659,343,466	5.9%
EK	Emirates	340,231,012,875	361,964,771,486	6.4%
WN	Southwest Airlines	275,798,191,678	286,663,356,537	3.9%
FR	Ryanair	239,079,871,666	263,878,610,195	10.4%
QR	Qatar Airways	234,814,052,555	257,228,169,594	9.5%
CZ	China Southern Airlines	216,663,598,427	246,183,620,321	13.6%
TK	Turkish Airlines	214,533,503,138	229,986,280,014	7.2%
MU	China Eastern Airlines	184,391,671,936	223,294,398,370	21.1%
CA	Air China	175,604,914,848	214,183,907,750	22.0%
BA	British Airways	171,843,980,651	178,294,182,237	3.8%
LH	Deutsche Lufthansa AG	154,462,427,245	169,170,256,789	9.5%
AC	Air Canada	160,457,467,639	168,815,025,244	5.2%
LA	LATAM Airlines Group	141,829,383,411	157,852,700,449	11.3%
6E	IndiGo	134,372,174,480	150,477,208,246	12.0%
U2	easyJet	117,342,540,175	126,644,111,322	7.9%
AS	Alaska Airlines	110,451,772,120	114,177,996,740	3.4%
NH	All Nippon Airways	92,449,062,137	99,001,127,342	7.1%
NK	Spirit Airlines	90,731,407,466	86,879,840,199	-4.2%

Key Takeaways:

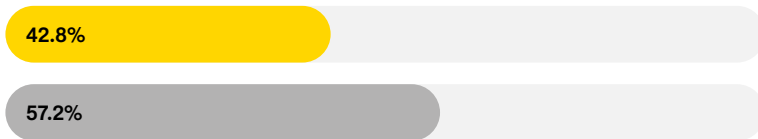
- In 2024, Air Canada **increased its capacity by 4%** compared to 2023 as it gradually rebuilt its network. However, the airline's **capacity remained 13% below 2019 levels**, with some notable adjustments to its network.
- Capacity in the **Asian market dropped by 23% since 2019**, and although the Middle East market is a smaller segment, its capacity decreased by nearly 24%. Some of the reduced flights to those markets recovered by **expanding back into Europe**, but in 2024 **86% of the airline's capacity was focused on the North American market**.
- Air Canada held around a **50% market share of capacity at Toronto Pearson (YYZ), Montreal (YUL), and Vancouver (YVR)**, with **YYZ as its main hub**, where **over one-third of passengers** were connecting.
- **Air Canada's domestic airfares** remained stable at **US\$694** (same as 2023), due to **limited competition** and due to **increased competition international airfares** fell to **US\$949** from **US\$1,104** in 2023.

2024 in Stats

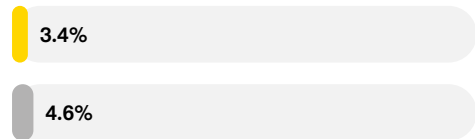


Domestic vs. International

Capacity by Type



Growth v 2023



● Domestic ● International

Capacity by Region

Region	2024	Growth v 2019	Share of Total	Change in Share v 2019
Africa	78,122	-	0.1%	0.0%
Asia	1,346,633	-22.7%	2.4%	-0.3%
Europe	3,950,551	5.8%	6.9%	1.2%
Latin America	2,452,548	3.5%	4.3%	0.7%
North America	48,945,237	-14.5%	85.6%	-1.6%
Middle East	140,399	-23.7%	0.2%	0.0%
Southwest Pacific	243,918	-6.7%	0.4%	0.0%

Average Airfares

Average Airfares*	Domestic	International
2023	694	1104
2024	694	949

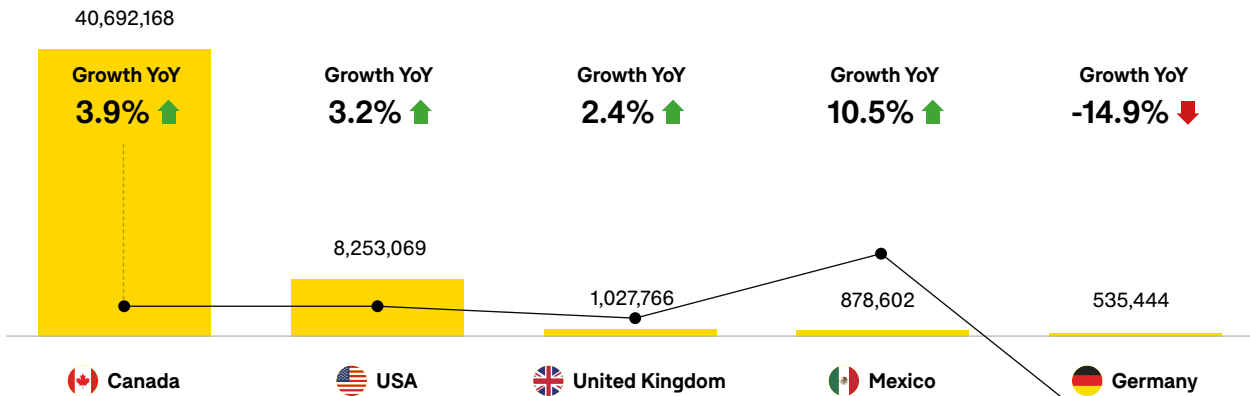
*Average 2024 cabin economy USD price at departure

Aircraft Fleet Composition

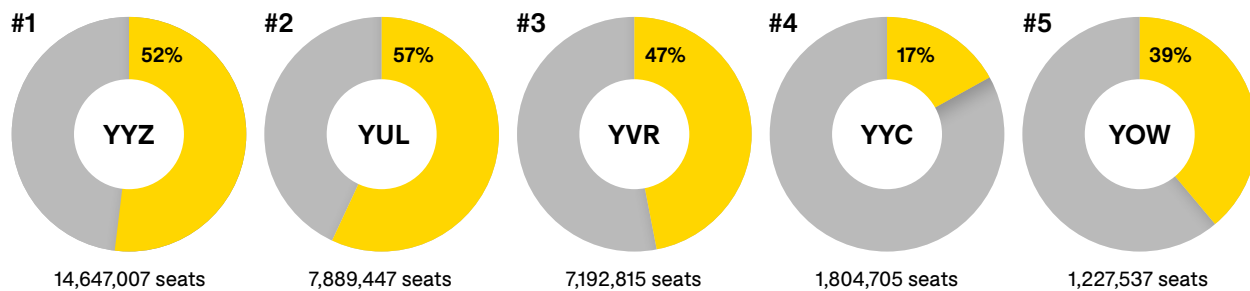
Fleet	Active	Unavailable*	On Order
Regional Jets/Props	0	0	0
Narrowbodies	101	17	42
Widebodies	81	11	18

*Includes out for maintenance, repair or in storage

Top 5 Country Markets by Airline Capacity



Top 5 Airports: Ranked by Seats & Showing Airline's Capacity Share % at Airport



Top 5 Busiest Routes

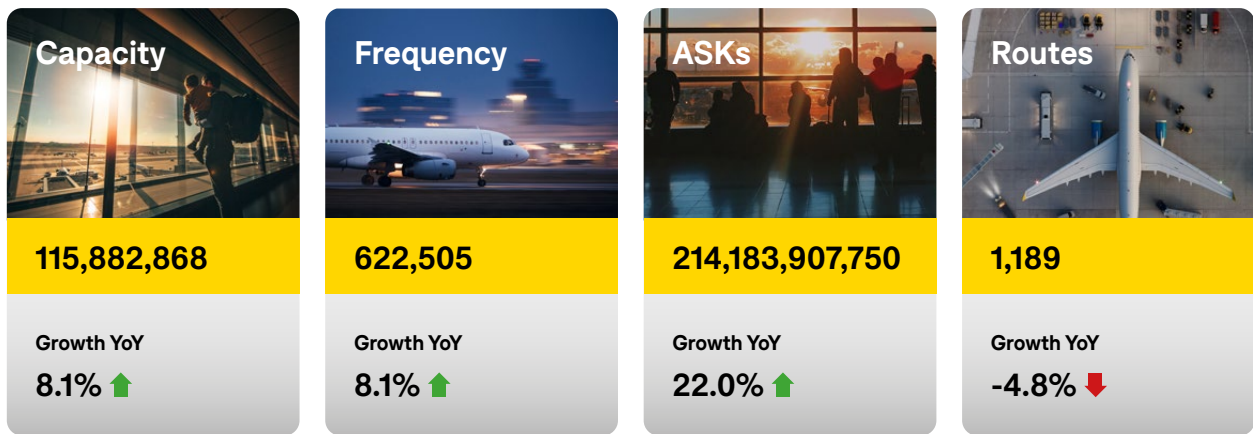
International	Domestic
YYZ-LHR	YYZ-YVR
LGA-YYZ	YYZ-YUL
YYZ-LAX	YVR-YYC
LAX-YVR	YYC-YYZ
YYZ-MCO	YYZ-YOW



Key Takeaways:

- Air China is transforming its network with a focus on **expanding international capacity**, aiming to **restore its pre-pandemic network**. In 2024, capacity to **Japan increased by 171%** year-on-year and capacity to **Germany nearly doubled** as the airline built **on its Star Alliance partners' operations in Frankfurt and Munich**.
- Outside of Germany **capacity growth in Europe was more cautious**, compared to their two local competitors, at just a **14% increase** (compared to 2019 levels) as the airline continued to prefer working within Star Alliance rather than launch new routes to smaller European markets.
- Average economy class **airfares for Air China increased by approximately US\$14**, with domestic fare increasing by 47% year-on-year, while international fares decreased by 4%.

2024 in Stats

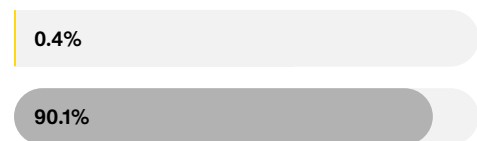


Domestic vs. International

Capacity by Type



Growth v 2023



● Domestic ● International

Capacity by Region

Region	2024	Growth v 2019	Share of Total	Change in Share v 2019
Africa	48,671	-	0.0%	0.0%
Asia	112,342,437	25.7%	96.9%	1.5%
Europe	2,690,088	13.6%	2.3%	-0.2%
Latin America	41,899	-45.4%	0.0%	0.0%
North America	290,402	-77.7%	0.3%	-1.1%
Middle East	232,425	53.1%	0.2%	0.0%
Southwest Pacific	236,946	-30.1%	0.2%	-0.2%

Average Airfares

Average Airfares*	Domestic	International
2023	280	967
2024	412	924

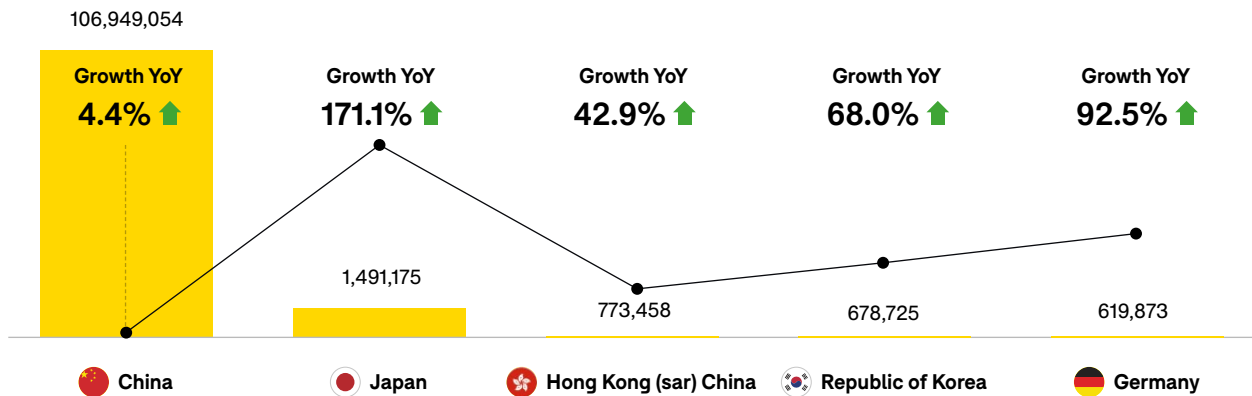
*Average 2024 cabin economy USD price at departure

Aircraft Fleet Composition

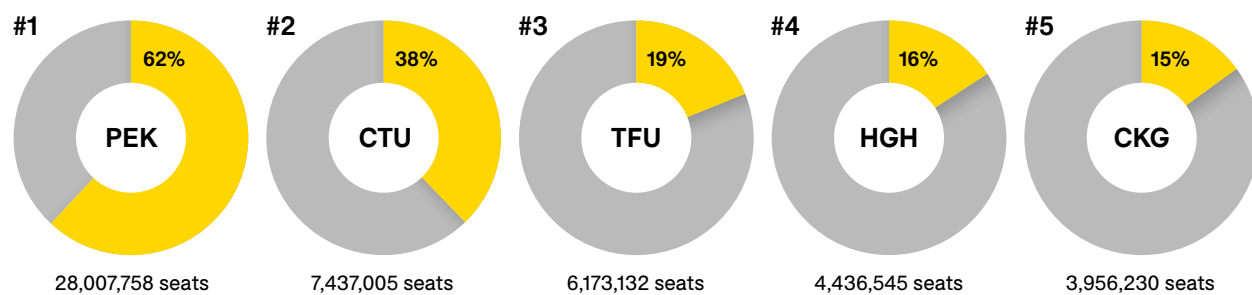
Fleet	Active	Unavailable*	On Order
Regional Jets/Props	25	6	4
Narrowbodies	288	54	163
Widebodies	117	11	0

*Includes out for maintenance, repair or in storage

Top 5 Country Markets by Airline Capacity



Top 5 Airports: Ranked by Seats & Showing Airline's Capacity Share % at Airport



Top 5 Busiest Routes

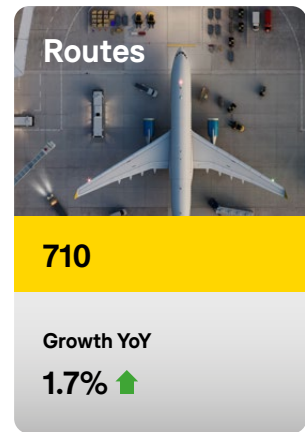
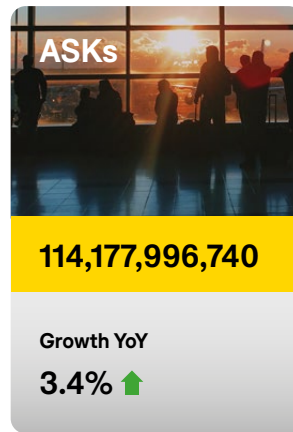
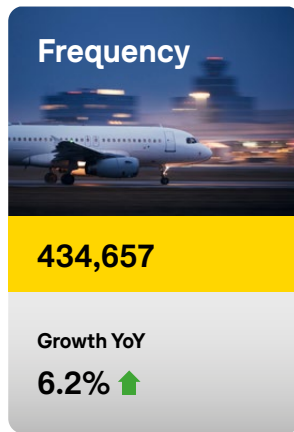
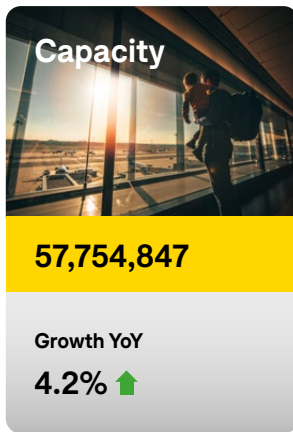
International	Domestic
PEK-HKG	CTU-PEK
PEK-HND	PEK-SHA
PVG-NRT	PEK-SZX
PEK-SIN	PEK-CAN
PEK-FRA	PEK-HGH



Key Takeaways:

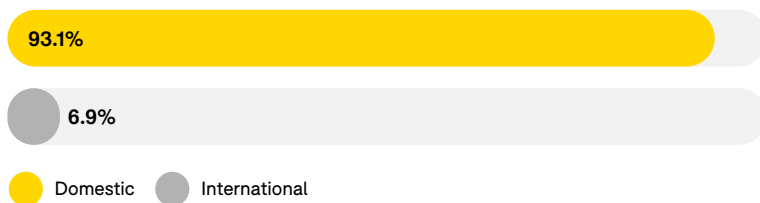
- Growth across all key operating metrics reflects the ambition of Alaska Airlines to **strengthen its position in the US market** - where **93% of its total capacity** is operated.
- Equally, the airline is seeking to slowly expand its footprint into international markets and added significant capacity to **Canada** in 2024; a **64% increase year-on-year**. However, **Mexico** remains their **second-largest international destination** with an 11% share of total capacity.
- Despite its name, Alaska Airlines's **two largest bases are outside Alaska** with Seattle (SEA) and Portland (PDX) key bases for the airline where it holds 53% and 42% share of respective capacity.

2024 in Stats

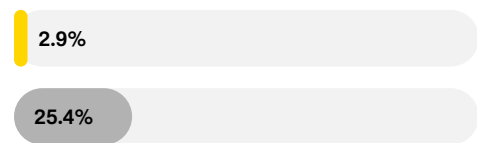


Domestic vs. International

Capacity by Type



Growth v 2023



Capacity by Region

Region	2024	Growth v 2019	Share of Total	Change in Share v 2019
Africa	0	-	0.0%	-
Asia	0	-	0.0%	-
Europe	0	-	0.0%	-
Latin America	1,605,639	57.4%	2.8%	1.0%
North America	56,149,208	-2.9%	97.2%	-1.0%
Middle East	0	-	0.0%	-
Southwest Pacific	0	-	0.0%	-

Average Airfares

Average Airfares*	Domestic	International
2023	505	609
2024	465	570

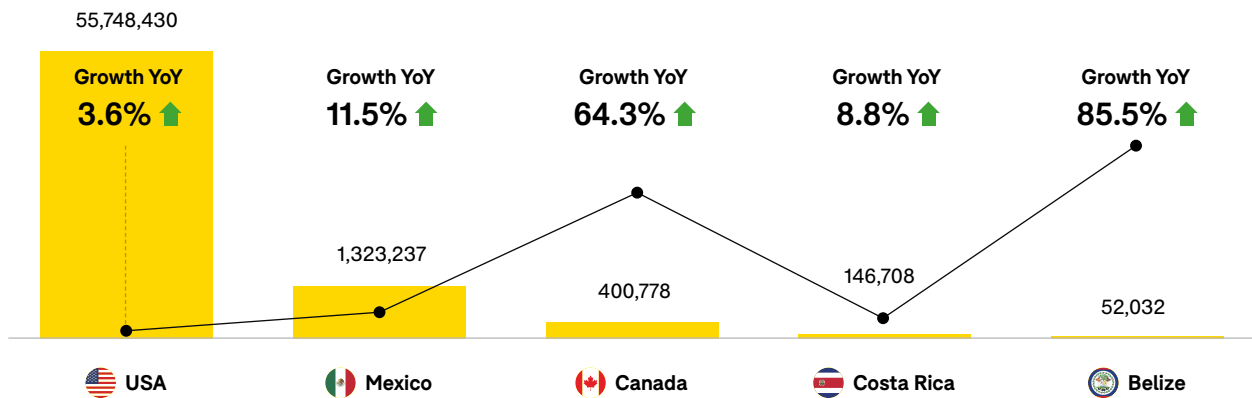
*Average 2024 cabin economy USD price at departure

Aircraft Fleet Composition

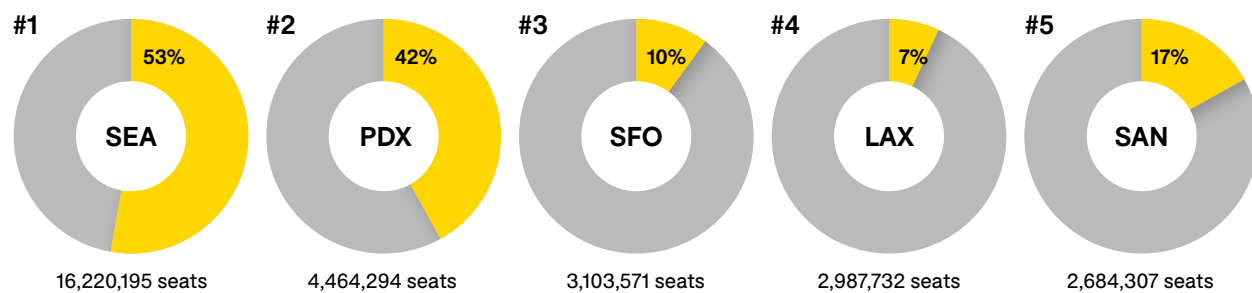
Fleet	Active	Unavailable*	On Order
Regional Jets/Props	0	0	0
Narrowbodies	222	16	69
Widebodies	0	0	0

*Includes out for maintenance, repair or in storage

Top 5 Country Markets by Airline Capacity



Top 5 Airports: Ranked by Seats & Showing Airline's Capacity Share % at Airport



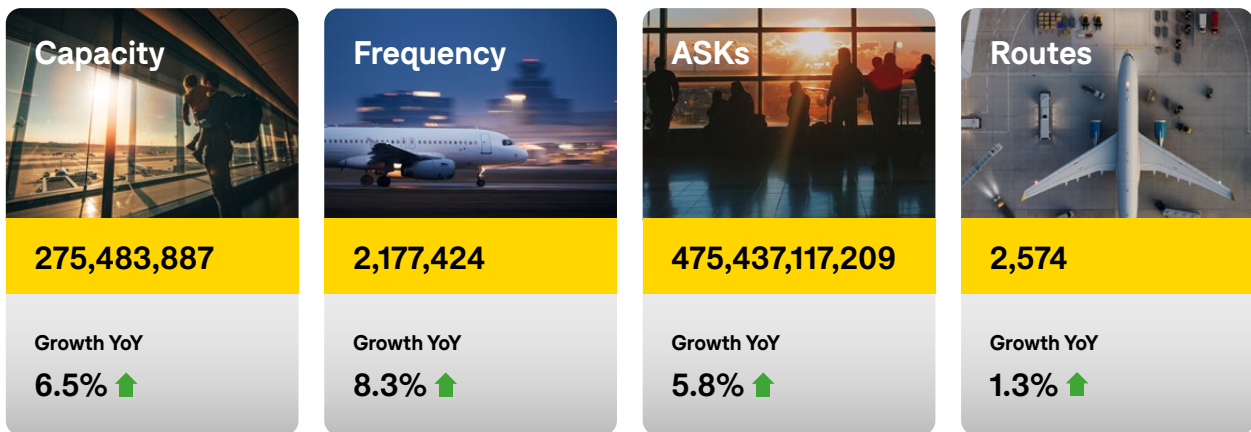
Top 5 Busiest Routes

International	Domestic
SEA-YVR	SEA-ANC
LAX-SJD	LAX-SEA
CUN-LAX	SEA-PHX
LIR-LAX	SEA-PDX
GDL-LAX	SEA-SFO

Key Takeaways:

- American Airlines ranks as the **largest scheduled airline in terms of capacity and frequency**, however it ranks **second by ASKs** due to its large domestic network and shorter average sector lengths than some other carriers.
- During 2024, American Airlines **increased capacity by growing their network**, with a focus on developing their **Latin American and European international routes**.
- **Mexico remains the largest international destination** for the airline accounting for over 5 million seats per annum followed by the **United Kingdom** with 2.4 million, where they collaborate with British Airways through a joint venture as part of their OneWorld alliance.
- With **five major hubs** across the United States, the airline **dominates at Dallas Ft Worth with an 81% share of capacity**, where nearly two-thirds of passengers connect to other destinations on their network.

2024 in Stats

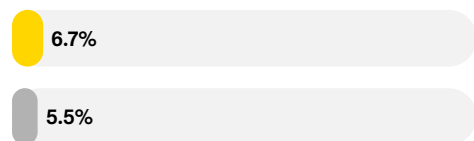


Domestic vs. International

Capacity by Type



Growth v 2023



● Domestic ● International

Capacity by Region

Region	2024	Growth v 2019	Share of Total	Change in Share v 2019
Africa	0	-	0.0%	-
Asia	699,514	-39.0%	0.3%	-0.2%
Europe	5,139,219	2.4%	1.9%	0.0%
Latin America	16,360,216	25.4%	5.9%	1.0%
North America	252,992,549	3.0%	91.8%	-0.9%
Middle East	104,310	-	0.0%	0.0%
Southwest Pacific	188,079	27.4%	0.1%	0.0%

Average Airfares

Average Airfares*	Domestic	International
2023	493	1126
2024	440	961

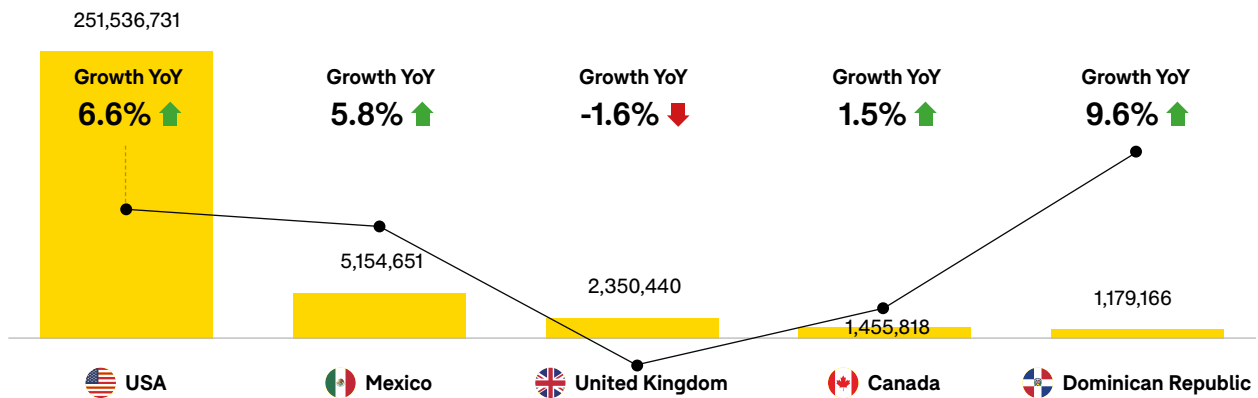
*Average 2024 cabin economy USD price at departure

Aircraft Fleet Composition

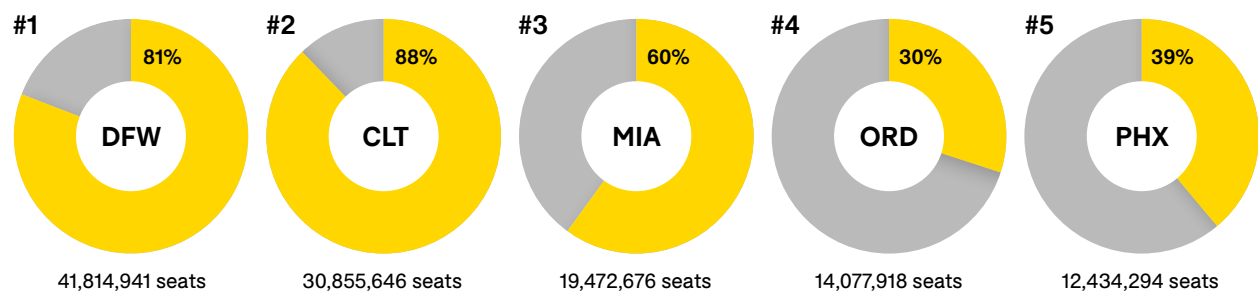
Fleet	Active	Unavailable*	On Order
Regional Jets/Props	0	0	96
Narrowbodies	799	66	301
Widebodies	112	29	25

*Includes out for maintenance, repair or in storage

Top 5 Country Markets by Airline Capacity



Top 5 Airports: Ranked by Seats & Showing Airline's Capacity Share % at Airport



Top 5 Busiest Routes

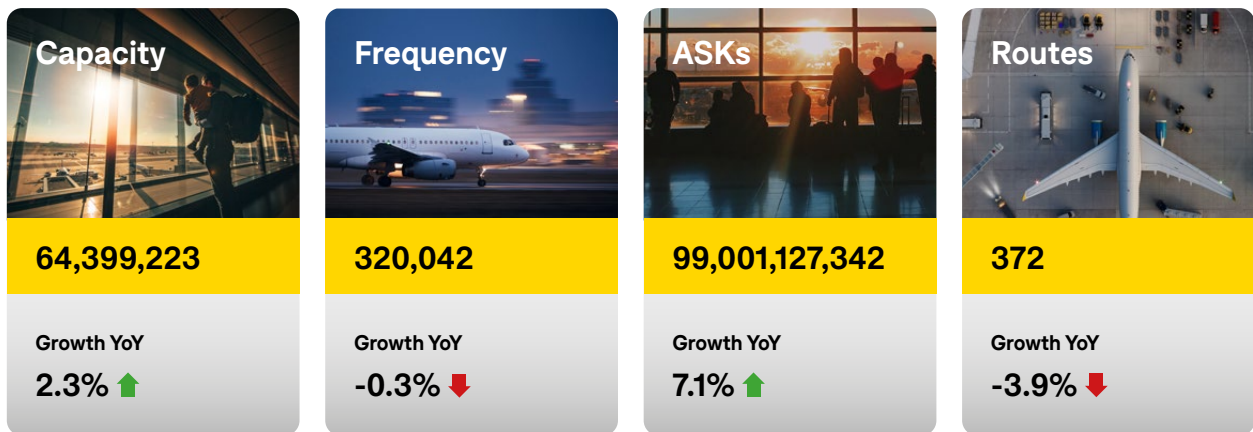
International	Domestic
CUN-DFW	LAX-DFW
MIA-HAV	DFW-PHX
DFW-LHR	DFW-MIA
JFK-LHR	CLT-MCO
MIA-SJU	DFW-LAS



Key Takeaways:

- In 2024, All Nippon Airways (ANA) (the largest airline in Japan along with its associated carriers) faced some **geo-political challenges** impacting its network operation. Capacity to **Europe fell by 37%**, compared to the pre-Covid capacity levels of 2019, due to **Russian overflight restrictions** softening commercial demand and increasing operating costs.
- Capacity to **China increased by 59%** year-on-year, but is yet to return to pre-pandemic volumes.
- The strength and size of the **Japanese domestic market remains a positive factor** for the airline with 84% of capacity focused on this market.
- The airline reported **no domestic capacity increase year-on-year**.
- ANA's average airfares in economy class on their **international services remain high** by industry standards with a typical fare of US\$1,702 but **have fallen compared to 2023 by approx. 14%**, partly due to the **weakening of the Japanese yen** in currency markets.

2024 in Stats

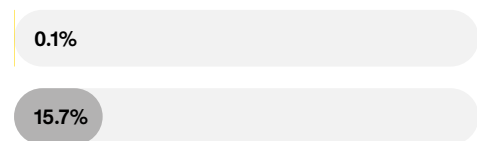


Domestic vs. International

Capacity by Type



Growth v 2023



● Domestic ● International

Capacity by Region

Region	2024	Growth v 2019	Share of Total	Change in Share v 2019
Africa	0	-	0.0%	-
Asia	62,275,878	-13.4%	96.7%	-0.3%
Europe	392,536	-37.2%	0.6%	-0.2%
Latin America	67,344	9.1%	0.1%	0.0%
North America	1,470,174	1.0%	2.3%	0.3%
Middle East	0	-	0.0%	-
Southwest Pacific	193,291	74.6%	0.3%	0.2%
Total	64,399,223	-13.1%	100.0%	0.0%

Average Airfares

Average Airfares*	Domestic	International
2023	219	1959
2024	227	1702

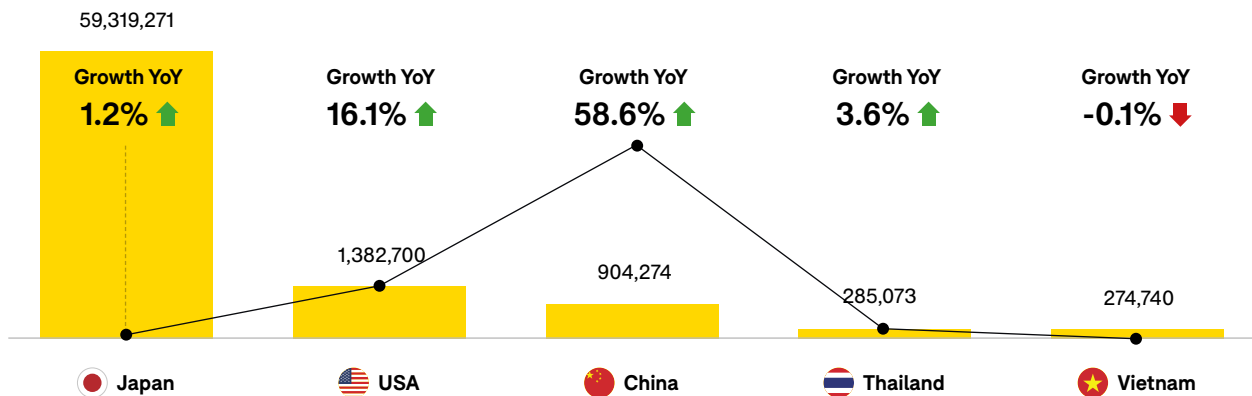
*Average 2024 cabin economy USD price at departure

Aircraft Fleet Composition

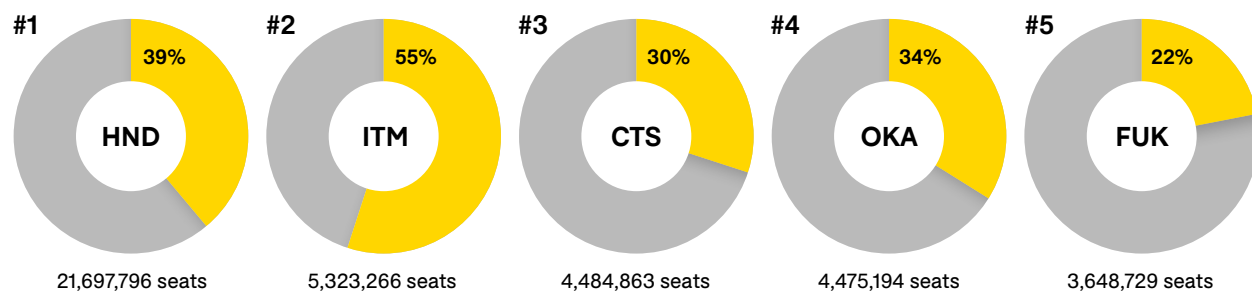
Fleet	Active	Unavailable*	On Order
Regional Jets/Props	0	0	0
Narrowbodies	64	12	0
Widebodies	126	14	26

*Includes out for maintenance, repair or in storage

Top 5 Country Markets by Airline Capacity



Top 5 Airports: Ranked by Seats & Showing Airline's Capacity Share % at Airport



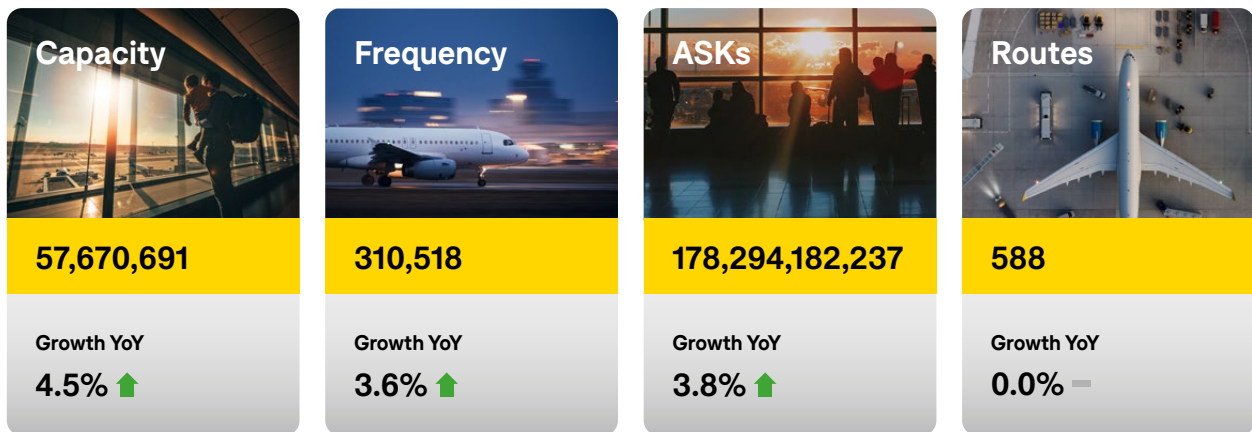
Top 5 Busiest Routes

International	Domestic
NRT-HNL	HIJ-HND
HND-GMP	HND-FUK
BKK-HND	HND-CTS
SIN-HND	OKA-HND
SYD-HND	HND-ITM

Key Takeaways:

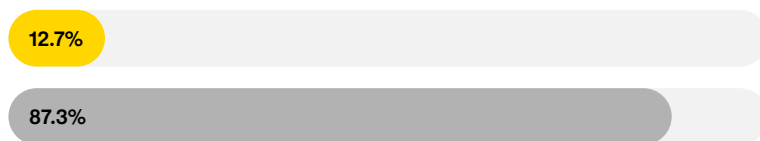
- In 2024, British Airways **increased flights operated by 4%** compared to the previous year, despite a **challenging operational backdrop of engine supply and MRO issues**.
- **New routes were added by BA**, but some were also dropped, resulting in a **similar count of routes** as the previous year.
- The **significance of the US market** for British Airways is evident, as the airline dedicates around **4.6 million seats** annually to this key market, which is known to be a major source of profit to the airline.
- With **capacity constrained at British Airways' two major bases** - Heathrow and Gatwick - the airline will be **closely monitoring airport expansion plans in the London market**, expected to be announced in the first half of 2025.

2024 in Stats

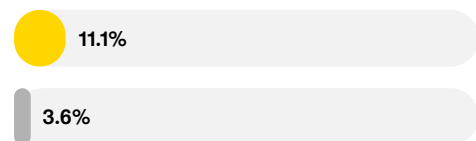


Domestic vs. International

Capacity by Type



Growth v 2023



● Domestic ● International

Capacity by Region

Region	2024	Growth v 2019	Share of Total	Change in Share v 2019
Africa	1,322,734	-	2.3%	-5.7%
Asia	1,544,761	-21.9%	2.7%	-0.4%
Europe	46,961,637	-3.1%	81.4%	5.0%
Latin America	1,874,509	18.1%	3.3%	0.7%
North America	5,036,767	-1.6%	8.7%	0.7%
Middle East	845,299	-20.4%	1.5%	-0.2%
Southwest Pacific	84,984	-21.6%	0.1%	0.0%

Average Airfares

Average Airfares*	Domestic	International
2023	234	1032
2024	233	1030

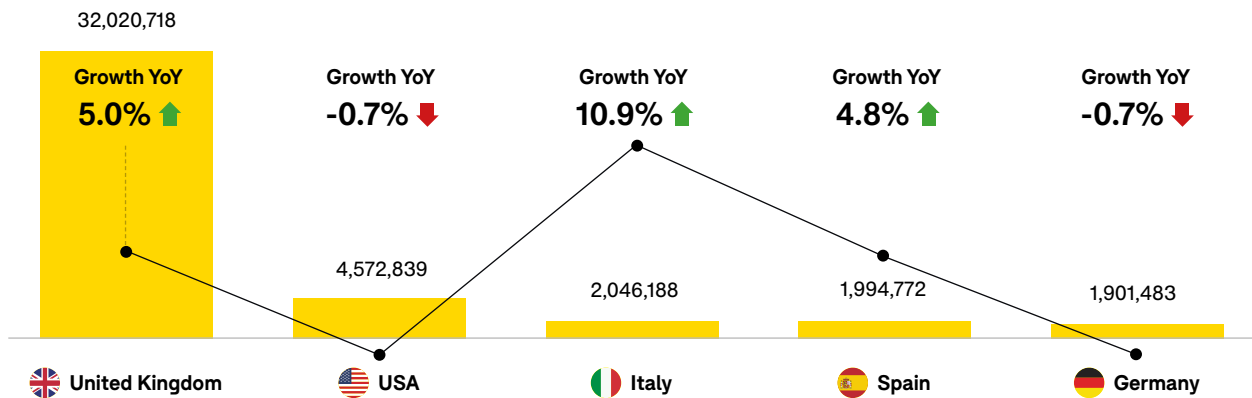
*Average 2024 cabin economy USD price at departure

Aircraft Fleet Composition

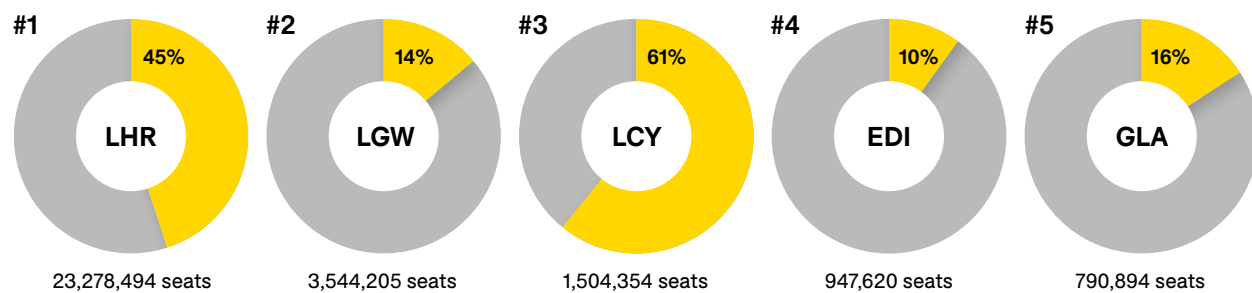
Fleet	Active	Unavailable*	On Order
Regional Jets/Props	0	0	0
Narrowbodies	113	9	18
Widebodies	120	10	25

*Includes out for maintenance, repair or in storage

Top 5 Country Markets by Airline Capacity



Top 5 Airports: Ranked by Seats & Showing Airline's Capacity Share % at Airport



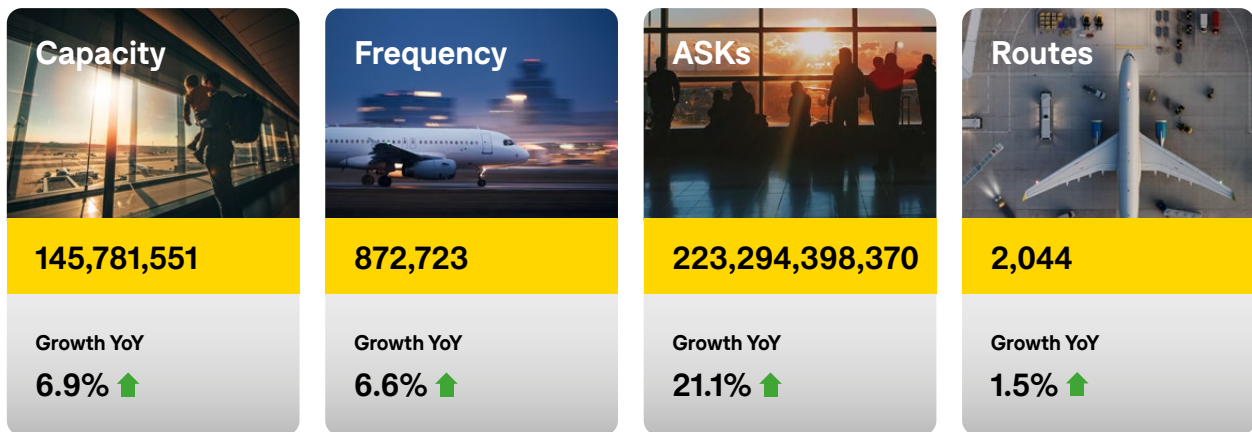
Top 5 Busiest Routes

International	Domestic
JFK-LHR	LHR-EDI
LHR-BCN	LHR-GLA
LHR-AMS	LHR-MAN
LHR-GVA	ABZ-LHR
LHR-FCO	LHR-BHD

Key Takeaways:

- **Domestic capacity declined by 1.5% YoY** as China Eastern carefully **return to more international markets**.
- China Eastern's **international capacity nearly doubled** in 2024, with the regional markets of **Japan and Thailand** benefitting the most.
- Compared to pre-Covid 2019 capacity levels, China Eastern **increased capacity to Europe by 41%**, with a combination of additional frequencies on existing routes and new routes added. However, **capacity to North America fell by 80%** vs. 2019 levels as bilateral constraints impacted services.
- With **outstanding aircraft orders and new aircraft expected this year** the airline is well placed for **further growth in 2025** and will be seeking new international markets as part of that growth plan.

2024 in Stats

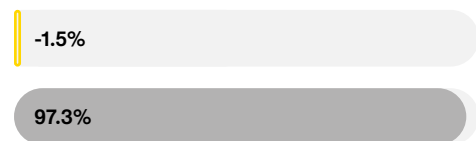


Domestic vs. International

Capacity by Type



Growth v 2023



● Domestic ● International

Capacity by Region

Region	2024	Growth v 2019	Share of Total	Change in Share v 2019
Africa	46,618	-	0.0%	0.0%
Asia	143,065,006	9.0%	98.1%	0.3%
Europe	1,459,286	40.9%	1.0%	0.2%
Latin America	0	-	0.0%	-
North America	207,240	-80.9%	0.1%	-0.7%
Middle East	242,553	82.4%	0.2%	0.1%
Southwest Pacific	760,848	14.8%	0.5%	0.0%

Average Airfares

Average Airfares*	Domestic	International
2023	198	982
2024	179	817

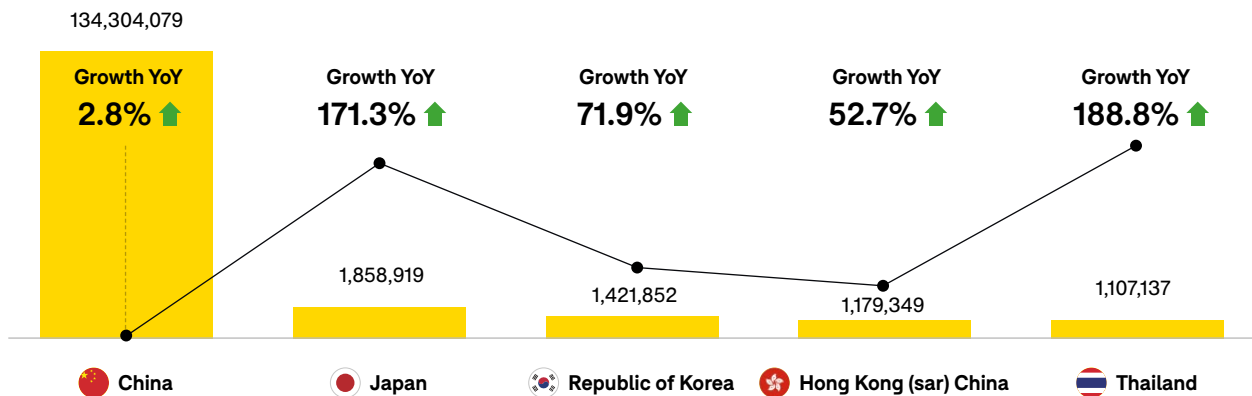
*Average 2024 cabin economy USD price at departure

Aircraft Fleet Composition

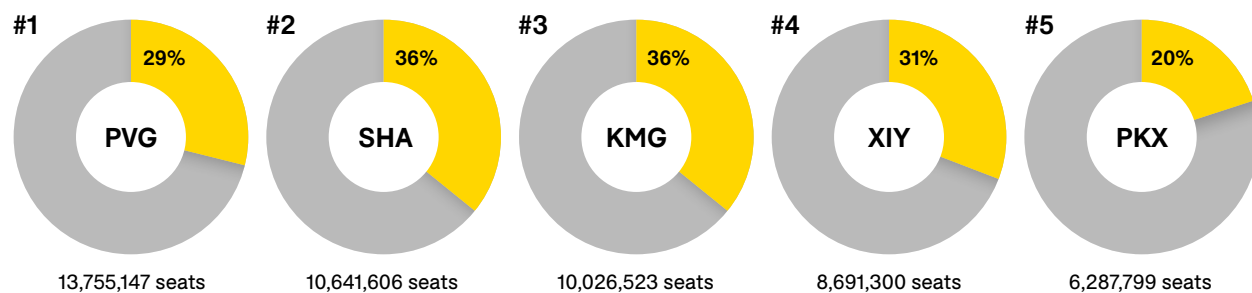
Fleet	Active	Unavailable*	On Order
Regional Jets/Props	0	0	11
Narrowbodies	502	24	193
Widebodies	90	9	0

*Includes out for maintenance, repair or in storage

Top 5 Country Markets by Airline Capacity



Top 5 Airports: Ranked by Seats & Showing Airline's Capacity Share % at Airport



Top 5 Busiest Routes

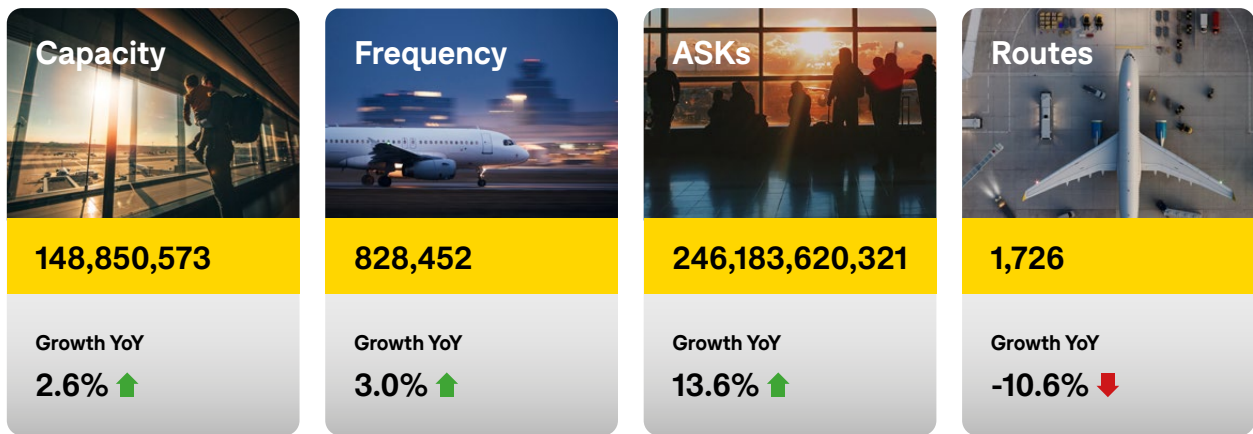
International	Domestic
HKG-PVG	XIY-PKX
SIN-PVG	SHA-PEK
NRT-PVG	SHA-CAN
KIX-PVG	SHA-SZX
PVG-ICN	SHA-XIY



Key Takeaways:

- Recovering from the pandemic and a sluggish local economy **China Southern began to grow their international market presence in 2024** adding significant amounts of capacity to **Europe** where the airline has taken advantage of its **lower operating costs** than other competitors.
- **Geo-political issues** have seen **capacity declines to North America**, which was a valuable revenue source pre-pandemic for the carrier.
- Within the international regional markets, **China Southern doubled capacity to both Thailand and Japan** as the outbound market shows signs of recovery.
- **Guangzhou remains the airline's largest base in China**, but their presence in the Beijing market continues to develop at **Daxing International Airport** with aspirations for an international-to-international connecting hub.

2024 in Stats

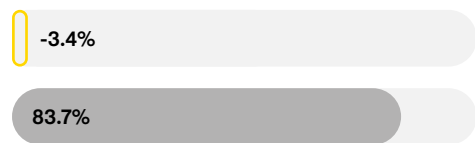


Domestic vs. International

Capacity by Type



Growth v 2023



● Domestic ● International

Capacity by Region

Region	2024	Growth v 2019	Share of Total	Change in Share v 2019
Africa	43,627	-	0.0%	0.0%
Asia	146,243,512	5.8%	98.2%	0.4%
Europe	1,150,020	28.3%	0.8%	0.1%
Latin America	20,254	-43.1%	0.0%	0.0%
North America	197,872	-75.8%	0.1%	-0.4%
Middle East	445,333	61.1%	0.3%	0.1%
Southwest Pacific	749,955	-19.8%	0.5%	-0.2%

Average Airfares

Average Airfares*	Domestic	International
2023	202	1173
2024	172	988

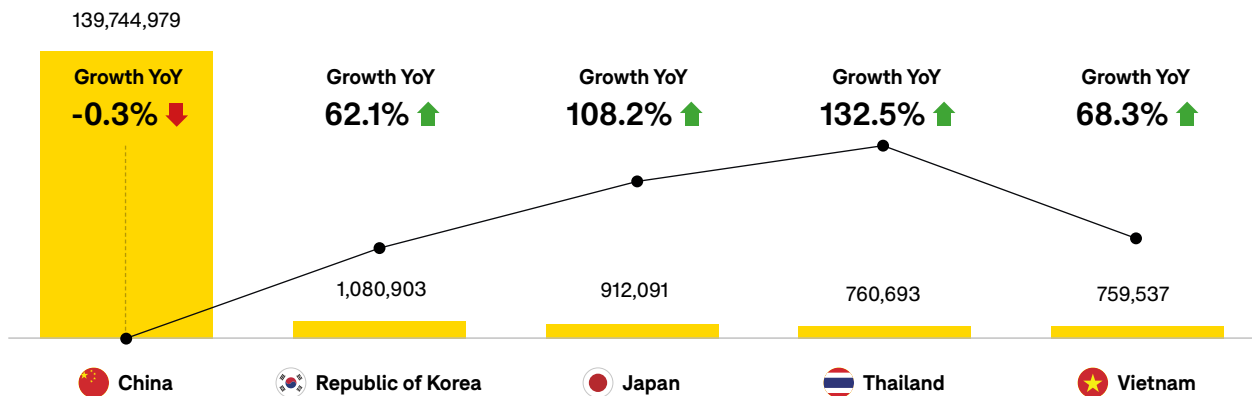
*Average 2024 cabin economy USD price at departure

Aircraft Fleet Composition

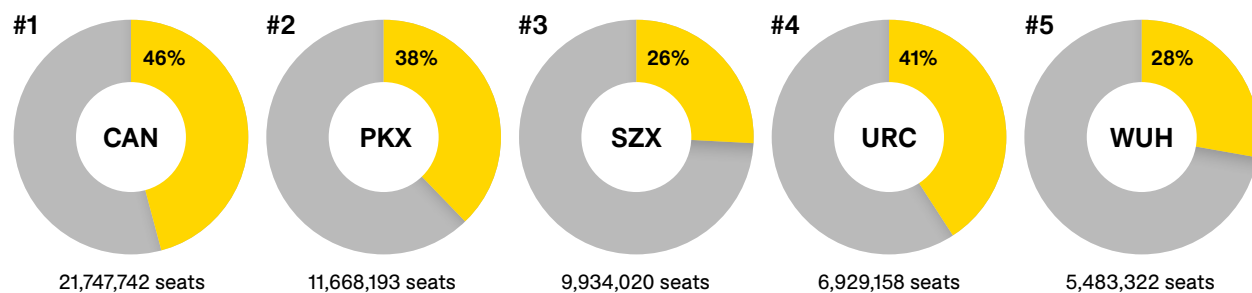
Fleet	Active	Unavailable*	On Order
Regional Jets/Props	20	2	3
Narrowbodies	401	49	125
Widebodies	91	12	0

*Includes out for maintenance, repair or in storage

Top 5 Country Markets by Airline Capacity



Top 5 Airports: Ranked by Seats & Showing Airline's Capacity Share % at Airport



Top 5 Busiest Routes

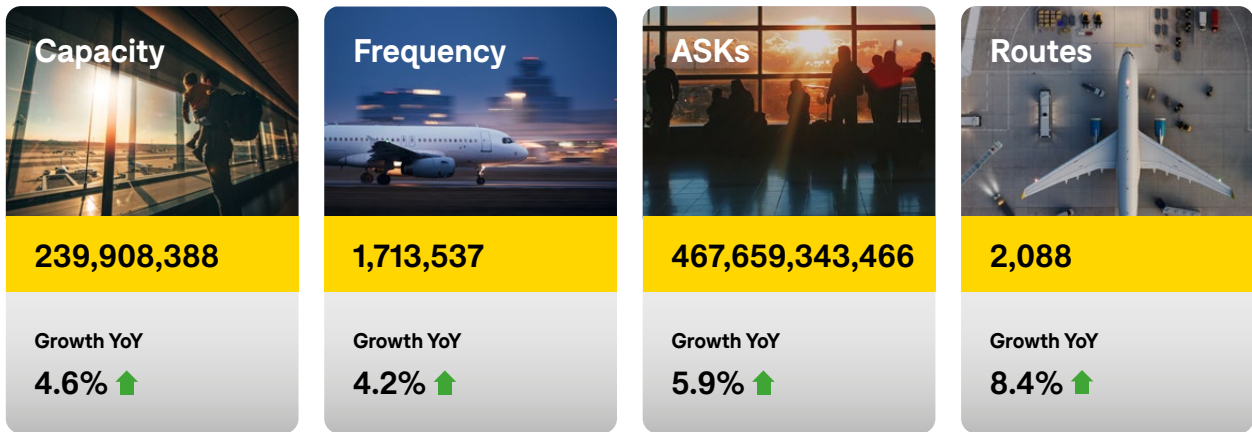
International	Domestic
CAN-BKK	CAN-PKX
KUL-CAN	CAN-SHA
CAN-SIN	SZX-PKX
CAN-SGN	SZX-SHA
SYD-CAN	HGH-CAN



Key Takeaways:

- Delta Air Lines consistently ranks among the **best airlines for on-time performance (OTP)** and are the **second largest carrier globally** in terms of seats on offer and frequency of service.
- Delivering some of the **strongest financial results in 2024** the airline is poised for a strong 2025 as they continue to take delivery of new aircraft, with the majority being Airbus.
- In 2024, **Delta's international capacity grew twice as quickly as its domestic capacity** as the airline invested heavily in Europe and Latin America while reducing its Asian presence.

2024 in Stats

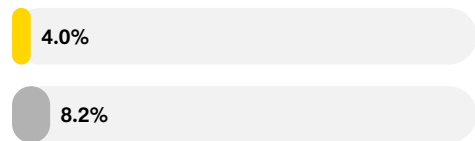


Domestic vs. International

Capacity by Type



Growth v 2023



● Domestic ● International

Capacity by Region

Region	2024	Growth v 2019	Share of Total	Change in Share v 2019
Africa	378,861	-	0.2%	0.1%
Asia	1,371,584	-37.3%	0.6%	-0.3%
Europe	6,714,709	15.7%	2.8%	0.4%
Latin America	7,451,776	9.0%	3.1%	0.3%
North America	223,743,132	-1.9%	93.3%	-0.4%
Middle East	18,265	-87.3%	0.0%	-0.1%
Southwest Pacific	230,061	118.3%	0.1%	0.1%

Average Airfares

Average Airfares*	Domestic	International
2023	406	943
2024	454	842

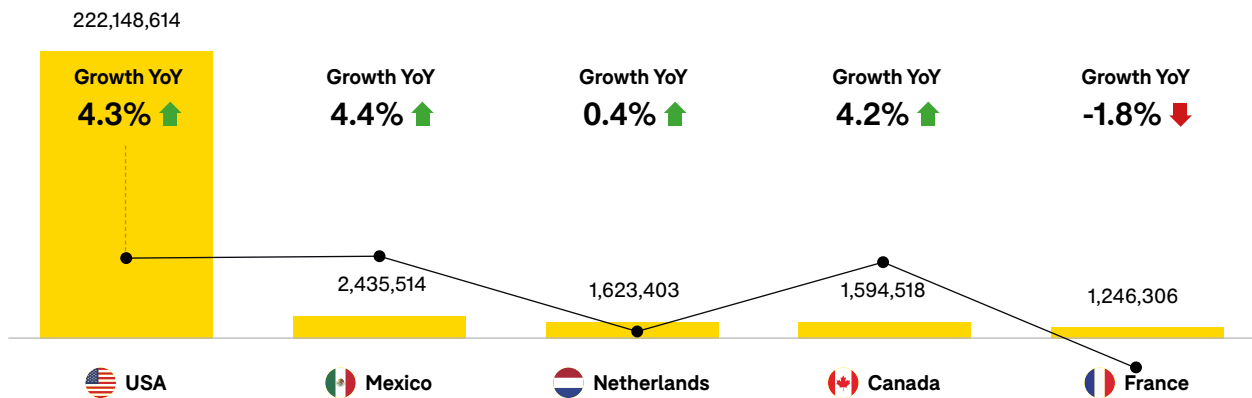
*Average 2024 cabin economy USD price at departure

Aircraft Fleet Composition

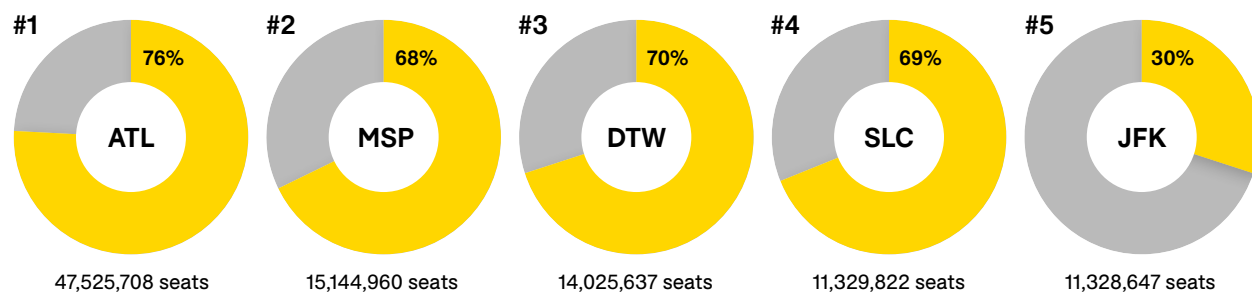
Fleet	Active	Unavailable*	On Order
Regional Jets/Props	0	0	0
Narrowbodies	752	81	261
Widebodies	155	18	39

*Includes out for maintenance, repair or in storage

Top 5 Country Markets by Airline Capacity



Top 5 Airports: Ranked by Seats & Showing Airline's Capacity Share % at Airport



Top 5 Busiest Routes

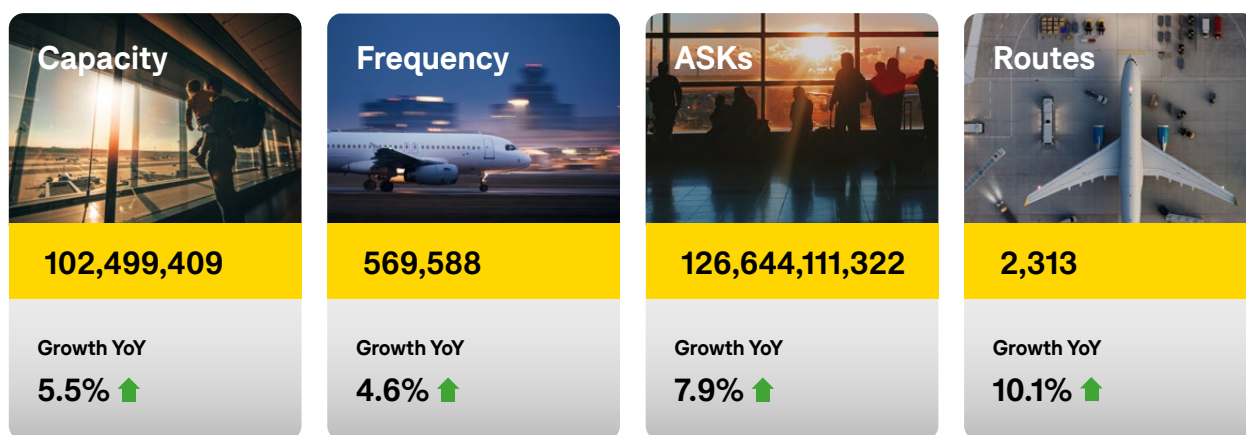
International	Domestic
ATL-CUN	ATL-MCO
AMS-DTW	ATL-LGA
ATL-SJU	ATL-TPA
MEX-ATL	ATL-LAX
ATL-AMS	FLL-ATL

easyJet

Key Takeaways:

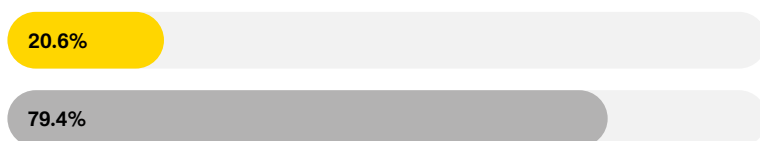
- In 2024, consistent capacity growth over many years sees **easyJet adding another 6% to its total capacity (YoY), and 10% more routes** to its network.
- The airline's **multiple bases across Europe** allow the airline to carefully develop markets, with particularly **large shares of capacity at constrained airports** such as London Gatwick; this positioning offers the carrier some protection from competitive pressures on key routes.
- With over **35 million seats per annum the United Kingdom remains the single largest market** for easyJet, twice as large as France and three times larger than Italy.
- Average **airfares for the airline increased slightly compared to 2023**, primarily driven by a US\$7 rise in domestic fares.

2024 in Stats

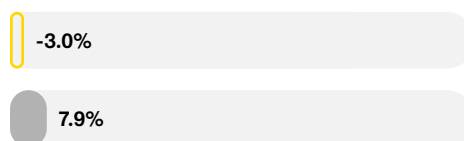


Domestic vs. International

Capacity by Type



Growth v 2023



● Domestic ● International

Capacity by Region

Region	2024	Growth v 2019	Share of Total	Change in Share v 2019
Africa	2,583,938	-	2.5%	1.8%
Asia	0	-	0.0%	-
Europe	99,904,509	-4.3%	97.5%	-1.2%
Latin America	0	-	0.0%	-
North America	0	-	0.0%	-
Middle East	10,962	-98.3%	0.0%	-0.6%
Southwest Pacific	0	-	0.0%	-

Average Airfares

Average Airfares*	Domestic	International
2023	101	153
2024	108	153

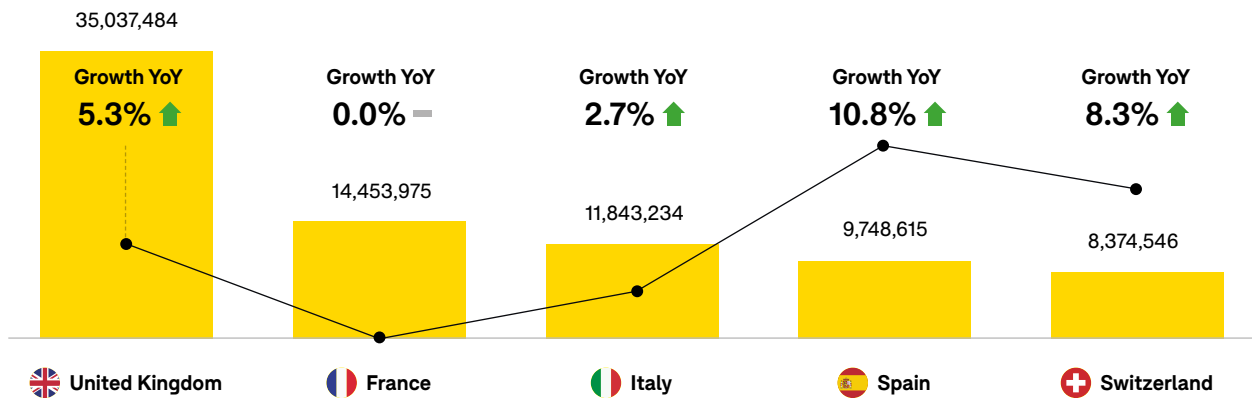
*Average 2024 cabin economy USD price at departure

Aircraft Fleet Composition

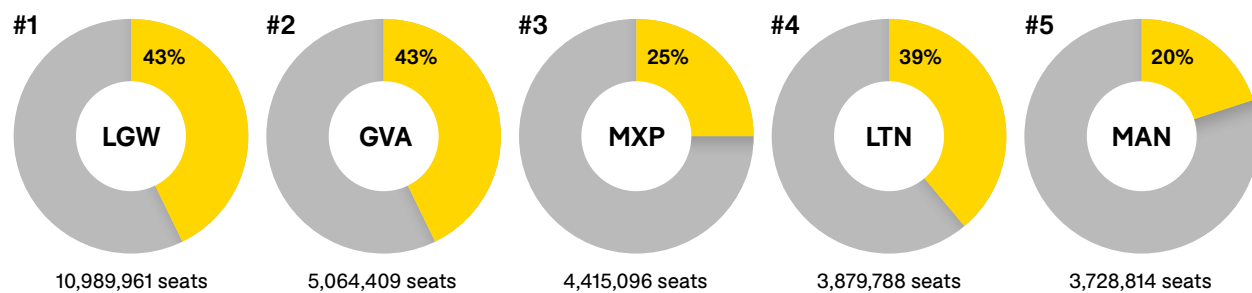
Fleet	Active	Unavailable*	On Order
Regional Jets/Props	0	0	0
Narrowbodies	176	9	295
Widebodies	0	0	0

*Includes out for maintenance, repair or in storage

Top 5 Country Markets by Airline Capacity



Top 5 Airports: Ranked by Seats & Showing Airline's Capacity Share % at Airport



Top 5 Busiest Routes

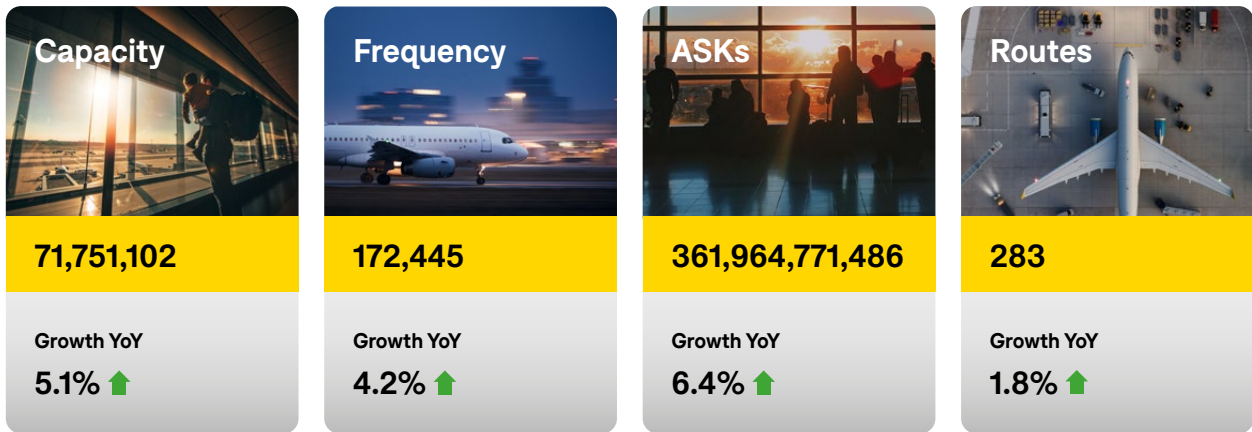
International	Domestic
LGW-GVA	BFS-LPL
OPO-GVA	ORY-NCE
AMS-LGW	BRS-EDI
LTN-AMS	LGW-BFS
MAN-AMS	LGW-EDI



Key Takeaways:

- Known for its long-haul operations, **Emirates ranks as the 4th largest airline in terms of Available Seat Kilometers (ASKs)**, even though it is 14th in terms of sheer capacity.
- With a **broad network spread from its Dubai hub**, the airline increased its capacity in 2024 (YoY):
 - USA: +4%
 - Australia: +18%
 - United Kingdom: +6%
- With the arrival of the **A350 into its fleet in late 2024** and subsequent **opening of new routes** using the smaller capacity aircraft, Emirates will be aiming to carefully **expand operations in 2025** through its Dubai hub where nearly two-thirds of passengers connect to other flights.

2024 in Stats

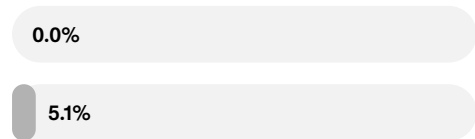


Domestic vs. International

Capacity by Type



Growth v 2023



● Domestic ● International

Capacity by Region

Region	2024	Growth v 2019	Share of Total	Change in Share v 2019
Africa	4,320,219	-	6.0%	-0.1%
Asia	12,272,449	-4.5%	17.1%	0.1%
Europe	12,258,212	-1.0%	17.1%	0.7%
Latin America	579,484	1.1%	0.8%	0.1%
North America	2,516,240	7.5%	3.5%	0.4%
Middle East	37,637,194	-7.1%	52.5%	-1.0%
Southwest Pacific	2,167,304	-11.9%	3.0%	-0.2%

Average Airfares

Average Airfares*	Domestic	International
2023	-	1172
2024	-	1093

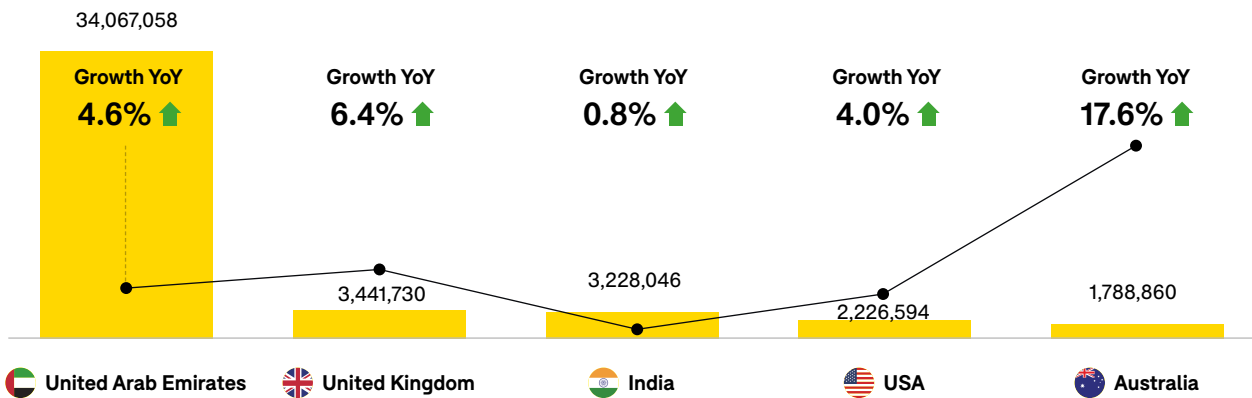
*Average 2024 cabin economy USD price at departure

Aircraft Fleet Composition

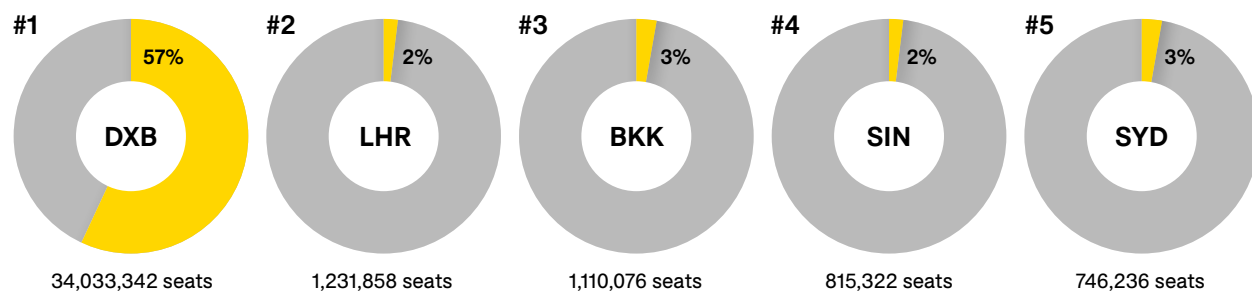
Fleet	Active	Unavailable*	On Order
Regional Jets/Props	0	0	0
Narrowbodies	1	0	0
Widebodies	228	32	309

*Includes out for maintenance, repair or in storage

Top 5 Country Markets by Airline Capacity



Top 5 Airports: Ranked by Seats & Showing Airline's Capacity Share % at Airport



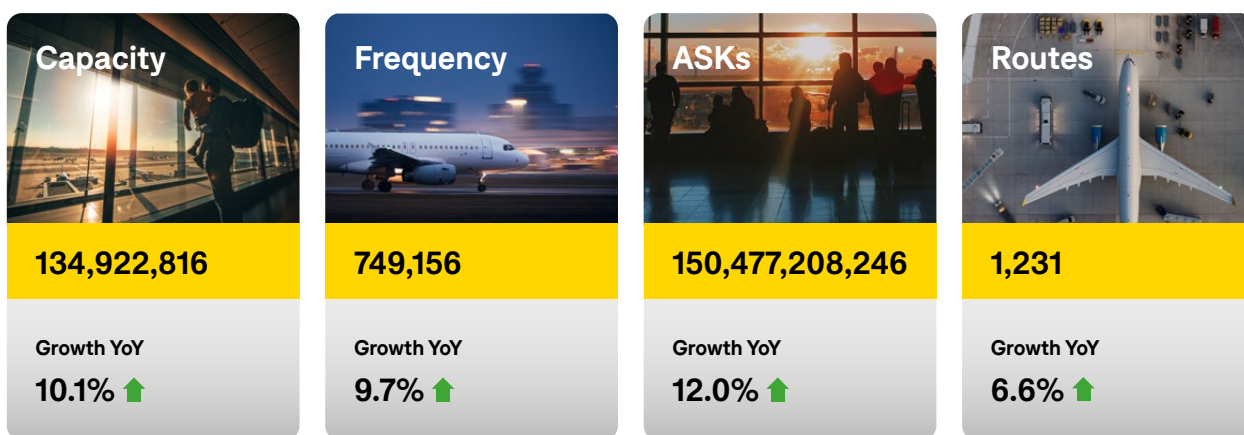
Top 5 Busiest Routes

International	Domestic
LHR-DXB	-
DXB-BKK	-
DXB-BOM	-
CAI-DXB	-
MAN-DXB	-

Key Takeaways:

- IndiGo holds **one of the world's largest aircraft orders**, with **over 900 aircraft on order** and were the largest recipient of 58 new Airbus aircraft during 2024, although the airline does have a large proportion (approx. 80 aircraft) inactive with MRO related supply chain issues.
- While **88% of capacity is allocated to domestic markets**, international growth is a key part of the airline's strategy with **expansion during 2024 focused on regional Middle East markets and Thailand**.
- Longer term ambition for IndiGo includes the **development of long-haul low-cost services** - the airline is apparently considering bringing forward launch plans with wet lease aircraft identified for 2025.

2024 in Stats

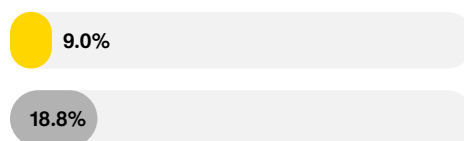


Domestic vs. International

Capacity by Type



Growth v 2023



● Domestic ● International

Capacity by Region

Region	2024	Growth v 2019	Share of Total	Change in Share v 2019
Africa	72,540	-	0.1%	0.1%
Asia	130,046,903	50.7%	96.4%	-0.8%
Europe	410,497	384.7%	0.3%	0.2%
Latin America	0	-	0.0%	-
North America	0	-	0.0%	-
Middle East	4,392,876	82.5%	3.3%	0.5%
Southwest Pacific	0	-	0.0%	-

Average Airfares

Average Airfares*	Domestic	International
2023	101	267
2024	92	273

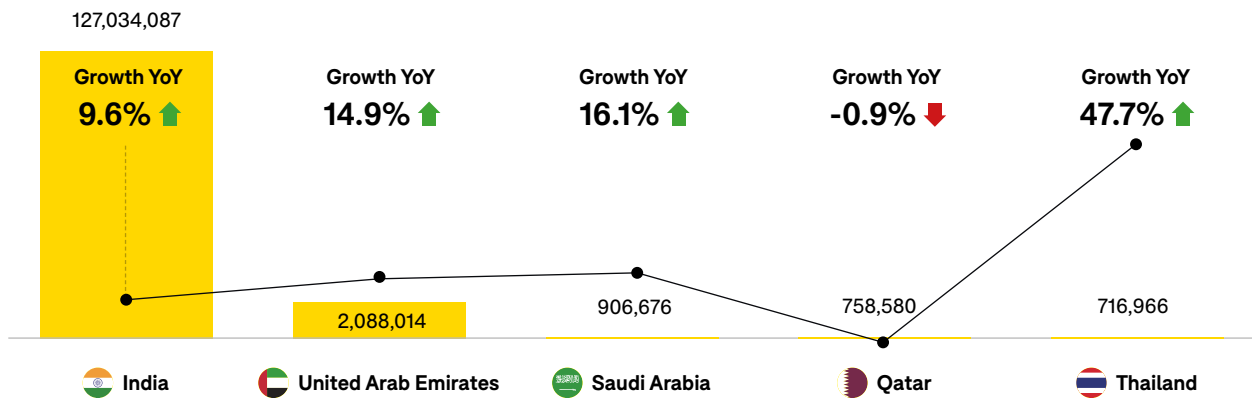
*Average 2024 cabin economy USD price at departure

Aircraft Fleet Composition

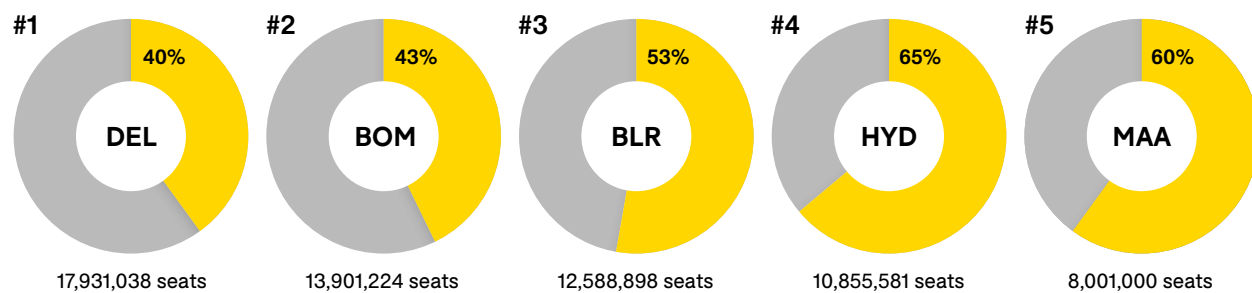
Fleet	Active	Unavailable*	On Order
Regional Jets/Props	43	2	5
Narrowbodies	261	82	916
Widebodies	0	0	30

*Includes out for maintenance, repair or in storage

Top 5 Country Markets by Airline Capacity



Top 5 Airports: Ranked by Seats & Showing Airline's Capacity Share % at Airport



Top 5 Busiest Routes

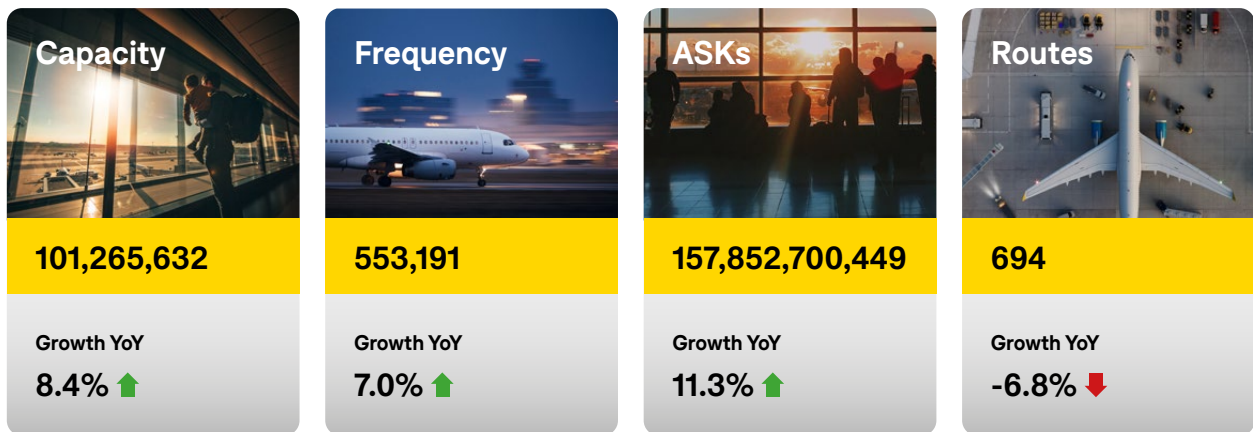
International	Domestic
DXB-BOM	DEL-BOM
HYD-DOH	DEL-BLR
DEL-KTM	BLR-BOM
DOH-BOM	DEL-HYD
SIN-MAA	DEL-CCU



Key Takeaways:

- The largest airline grouping in Latin America, LATAM, **continued to grow steadily in 2024** with a near 20% increase in international capacity year-on-year.
- This **expansion notably benefited Chile and Peru**, with increases of 21% and 13%, respectively.
- Brazil, with its **very large domestic market**, remains the largest for LATAM with over **47 million seats** supplied in 2024.
- The airline has strategically **boosted its capacity to the North American** market by 61% in 2024 compared to pre-Covid 2019 levels, although it still only accounts for 2% of all the airline's seats so it's at a relatively low risk to the wider operation.
- **Sao Paulo Guarulhos (GRU)** remains the airline's largest hub where LATAM holds a **52% share of all capacity**, over which 45% of traffic connects to other points.
- With dominant capacity shares in Santiago, Lima and Sao Paulo Guarulhos, LATAM is well-positioned for 2025 and should continue its **steady growth**.

2024 in Stats

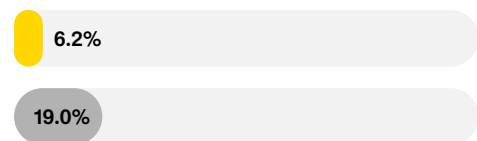


Domestic vs. International

Capacity by Type



Growth v 2023



● Domestic ● International

Capacity by Region

Region	2024	Growth v 2019	Share of Total	Change in Share v 2019
Africa	49,468	-	0.0%	0.0%
Asia	0	-	0.0%	-
Europe	1,331,684	4.8%	1.3%	-0.1%
Latin America	97,703,191	16.3%	96.5%	-0.2%
North America	1,846,447	60.6%	1.8%	0.5%
Middle East	-	-100.0%	0.0%	0.0%
Southwest Pacific	334,842	-11.9%	0.3%	-0.1%

Average Airfares

Average Airfares*	Domestic	International
2023	417	929
2024	414	878

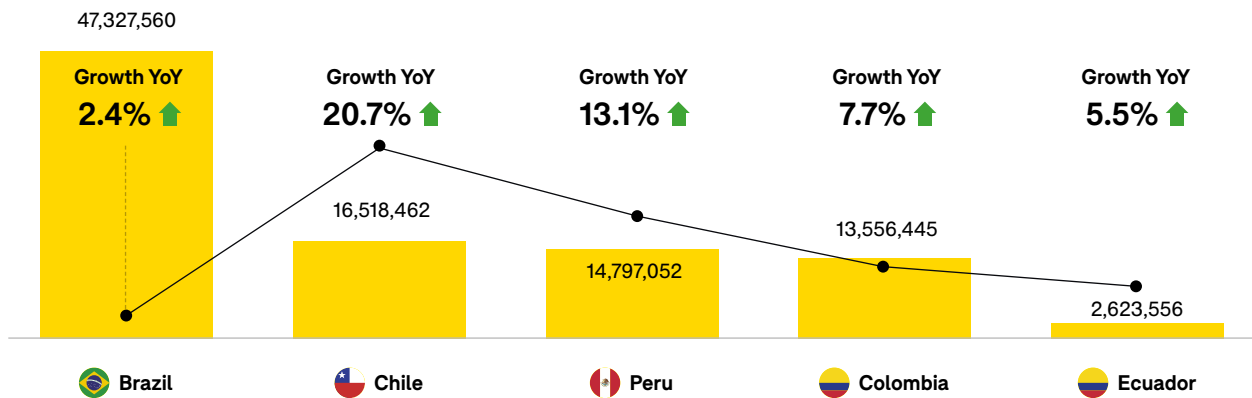
*Average 2024 cabin economy USD price at departure

Aircraft Fleet Composition

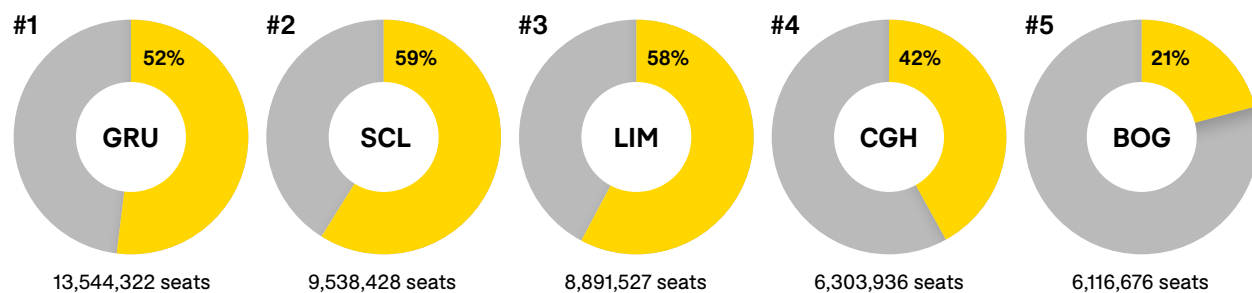
Fleet	Active	Unavailable*	On Order
Regional Jets/Props	0	0	0
Narrowbodies	35	2	0
Widebodies	23	2	0

*Includes out for maintenance, repair or in storage

Top 5 Country Markets by Airline Capacity



Top 5 Airports: Ranked by Seats & Showing Airline's Capacity Share % at Airport



Top 5 Busiest Routes

International	Domestic
SCL-GRU	ANF-SCL
SCL-LIM	LIM-CUZ
GIG-SCL	SDU-CGH
MIA-GRU	MDE-BOG
GRU-AEP	SCL-CJC

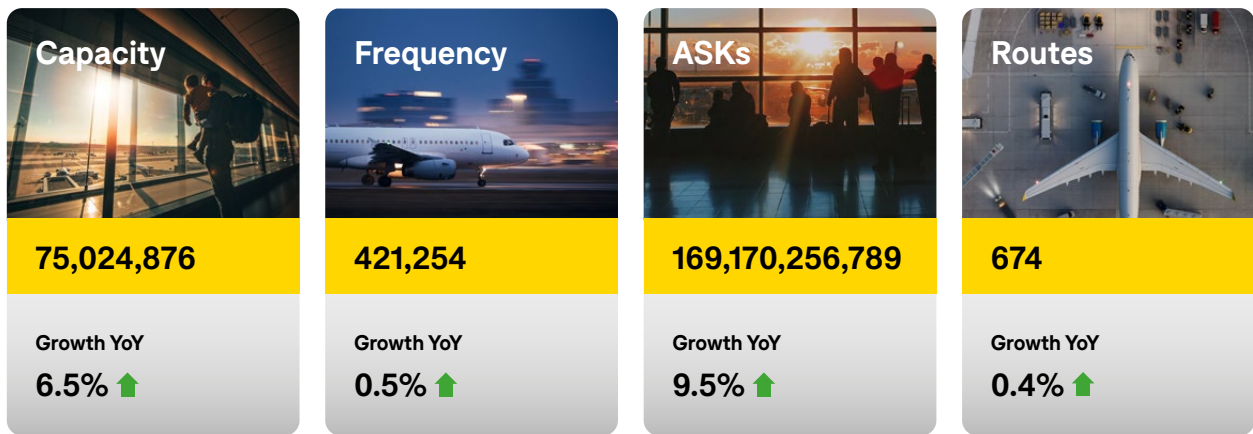


Lufthansa

Key Takeaways:

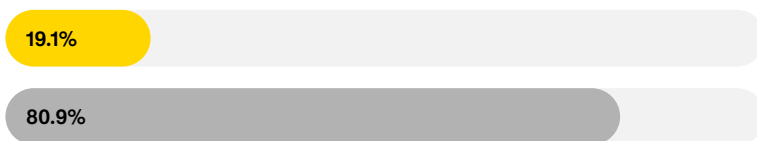
- 2024 was a **challenging year** for Deutsche Lufthansa AG as a **weak home market, requirements around sustainability and a slower return of capacity post-pandemic** than other carriers impacted the airline's performance.
- Lufthansa **reduced capacity in every market throughout 2024** compared to 2019 capacity levels, notably:
 - **Middle East: -44%**
 - **Latin America: -26%**
 - **Europe: -18%** (despite making up **88% of total capacity**)
- Interestingly, **Lufthansa's second-largest market is the USA** and not one of the major European markets, an unusual position for a European airline.
- As Germany's national airline, Lufthansa continue to dominate capacity at the two main airport hubs - **Frankfurt and Munich** - where they hold close to **60% share** at each, with large proportions of that traffic connecting onwards to other destinations.

2024 in Stats

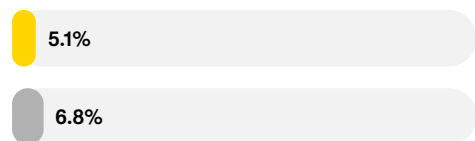


Domestic vs. International

Capacity by Type



Growth v 2023



● Domestic ● International

Capacity by Region

Region	2024	Growth v 2019	Share of Total	Change in Share v 2019
Africa	1,249,268	-	1.7%	0.2%
Asia	2,361,984	-24.1%	3.1%	-0.2%
Europe	66,206,862	-17.9%	88.2%	0.2%
Latin America	628,655	-26.4%	0.8%	-0.1%
North America	3,795,784	-11.2%	5.1%	0.4%
Middle East	782,323	-43.5%	1.0%	-0.5%
Southwest Pacific	0	-	0.0%	-

Average Airfares

Average Airfares*	Domestic	International
2023	241	758
2024	263	707

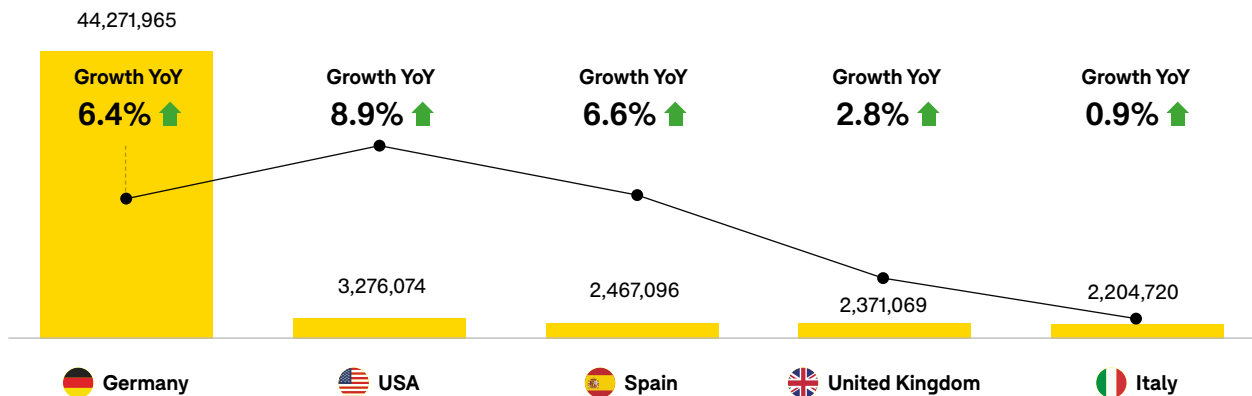
*Average 2024 cabin economy USD price at departure

Aircraft Fleet Composition

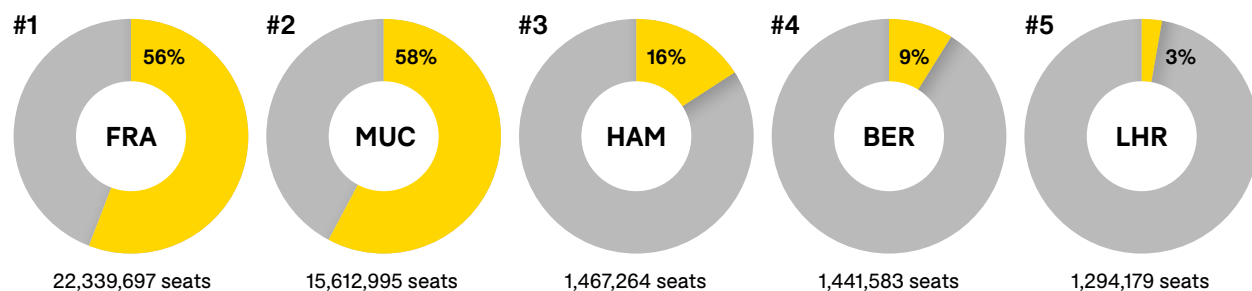
Fleet	Active	Unavailable*	On Order
Regional Jets/Props	0	0	0
Narrowbodies	152	24	129
Widebodies	90	20	98

*Includes out for maintenance, repair or in storage

Top 5 Country Markets by Airline Capacity



Top 5 Airports: Ranked by Seats & Showing Airline's Capacity Share % at Airport



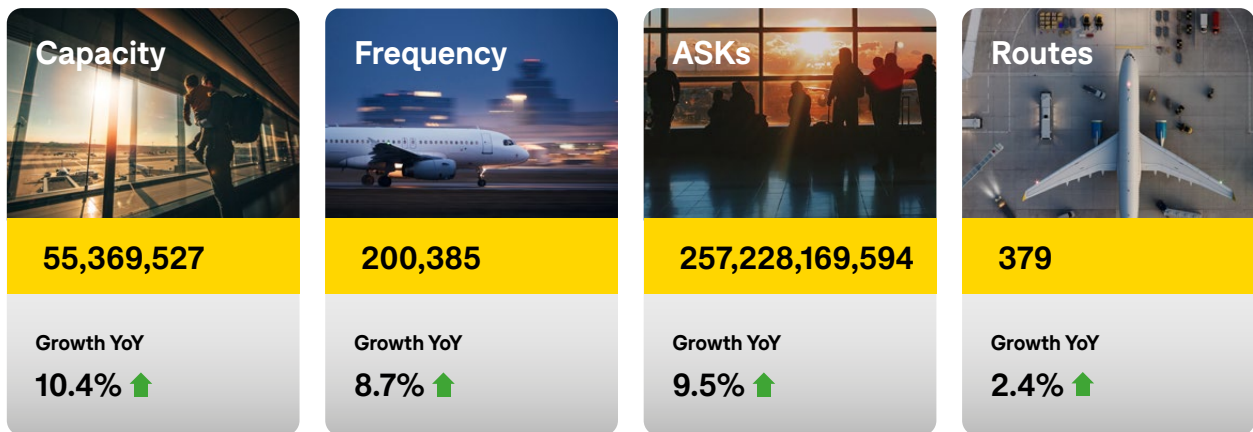
Top 5 Busiest Routes

International	Domestic
FRA-LHR	BER-MUC
LHR-MUC	BER-FRA
BCN-FRA	FRA-HAM
CDG-FRA	MUC-FRA
BCN-MUC	HAM-MUC

Key Takeaways:

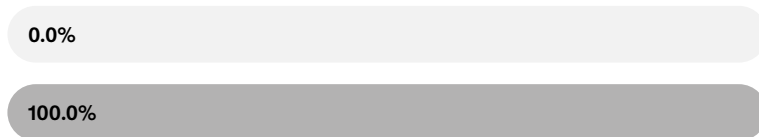
- Qatar Airways is strategically enhancing its brand with a **consistent 10% annual capacity growth**, driven by increased flight frequencies and new routes, positioning it as the seventh largest airline globally by ASKs.
- Large capacity increases occurred in 2024 to regional markets such **as North America and the Southwest Pacific**.
- The airline **expanded its network in Australia** by capitalizing on relaxed bilateral agreements, culminating in an investment in Virgin Australia to strengthen market position.
- Intriguingly **the United States is the second largest market** for this carrier with over 1.85 million seats in 2024, followed closely by the United Kingdom with 1.81 million.
- Nearly **85% of traffic passing through the Doha hub is connecting onwards** to other destinations; one of the highest levels across major global airlines.

2024 in Stats

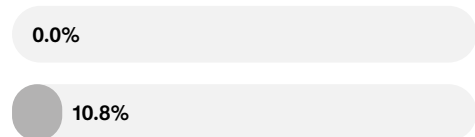


Domestic vs. International

Capacity by Type



Growth v 2023



● Domestic ● International

Capacity by Region

Region	2024	Growth v 2019	Share of Total	Change in Share v 2019
Africa	3,207,928	-	5.8%	1.8%
Asia	8,758,586	1.6%	15.8%	-1.6%
Europe	8,010,493	-8.9%	14.5%	-3.4%
Latin America	211,481	-28.5%	0.4%	-0.2%
North America	1,990,317	47.7%	3.6%	0.9%
Middle East	31,935,645	17.6%	57.7%	2.6%
Southwest Pacific	1,255,077	10.6%	2.3%	0.0%

Average Airfares

Average Airfares*	Domestic	International
2023	-	1014
2024	-	923

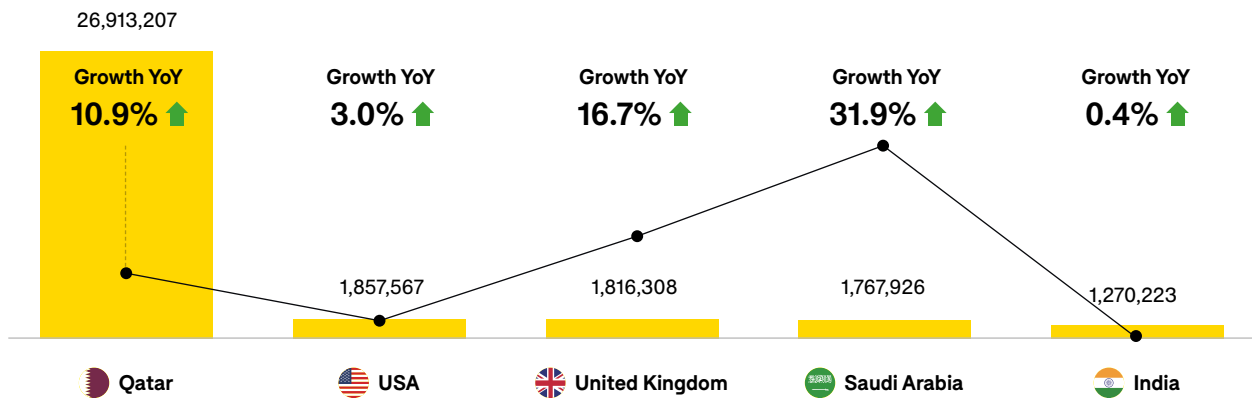
*Average 2024 cabin economy USD price at departure

Aircraft Fleet Composition

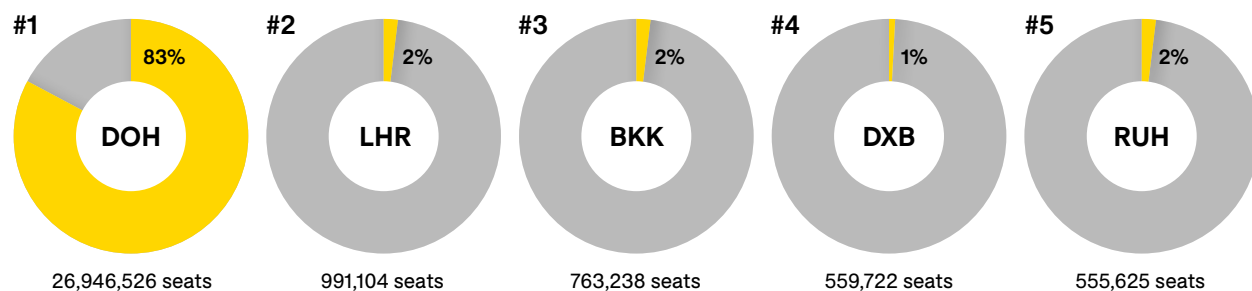
Fleet	Active	Unavailable*	On Order
Regional Jets/Props	0	0	0
Narrowbodies	34	4	75
Widebodies	206	14	124

*Includes out for maintenance, repair or in storage

Top 5 Country Markets by Airline Capacity



Top 5 Airports: Ranked by Seats & Showing Airline's Capacity Share % at Airport



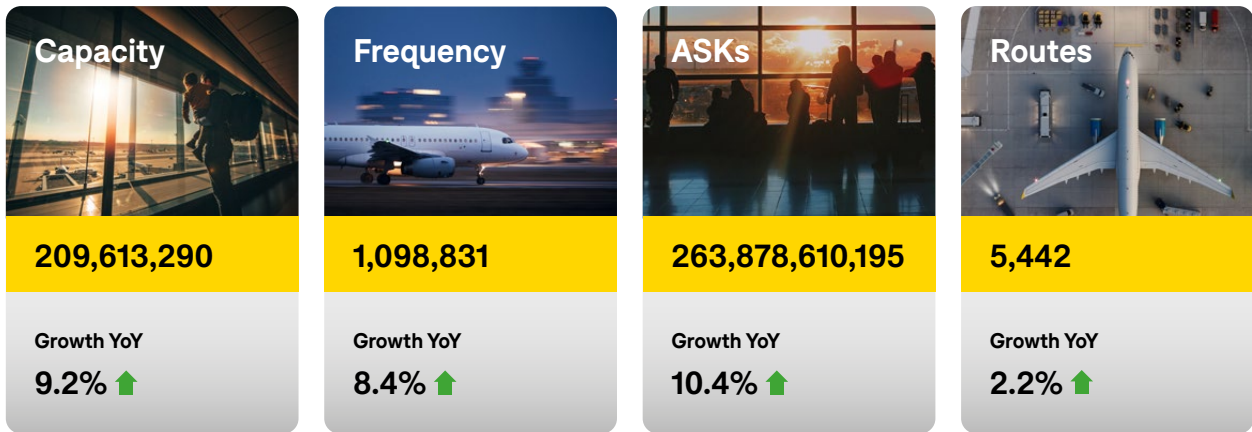
Top 5 Busiest Routes

International	Domestic
DOH-LHR	-
DOH-BKK	-
DOH-DXB	-
DOH-RUH	-
DOH-JED	-

Key Takeaways:

- Ryanair, an airline that is constantly growing, **operates more routes than any other airline with over 5,400 airport pairs served in 2024.**
- Despite delivery delays of B737 aircraft, which led to some adjustments in planned growth for the latter half of the year, **the airline achieved a 9% capacity increase from 2023 to 2024.**
- With **97% of capacity allocated to European markets** and multiple bases across the continent, Ryanair adopt a strategy of opening new markets from multiple bases, **rapidly building network scale** in those new destinations.
- Given the company's historic network foundation and market concentration, it is no surprise that **four of their top five routes are from Ireland to the United Kingdom.**

2024 in Stats



Domestic vs. International

Capacity by Type



Growth v 2023



● Domestic ● International

Capacity by Region

Region	2024	Growth v 2019	Share of Total	Change in Share v 2019
Africa	5,322,493	-	2.5%	0.9%
Asia	0	-	0.0%	-
Europe	204,140,876	37.8%	97.4%	-0.4%
Latin America	0	-	0.0%	-
North America	0	-	0.0%	-
Middle East	149,921	-80.8%	0.1%	-0.4%
Southwest Pacific	0	-	0.0%	-

Average Airfares

Average Airfares*	Domestic	International
2023	139	147
2024	133	135

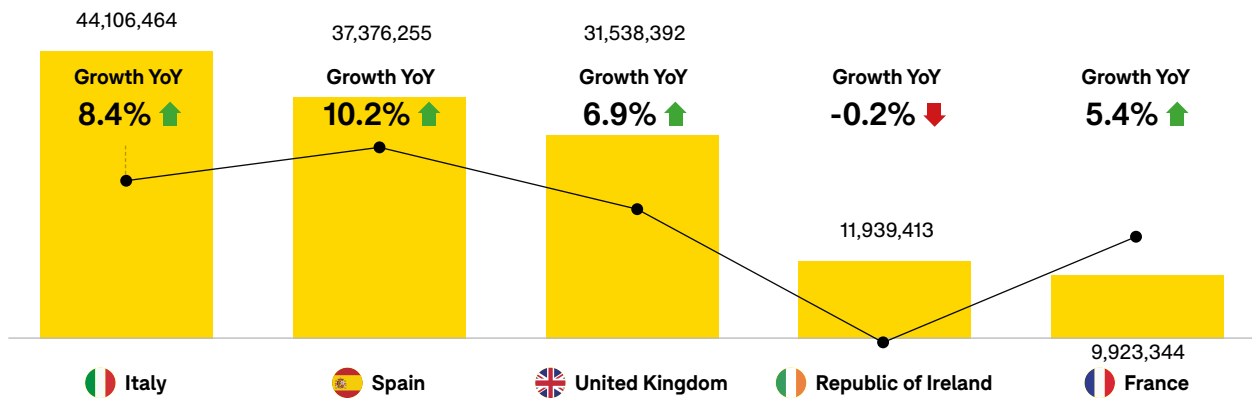
*Average 2024 cabin economy USD price at departure

Aircraft Fleet Composition

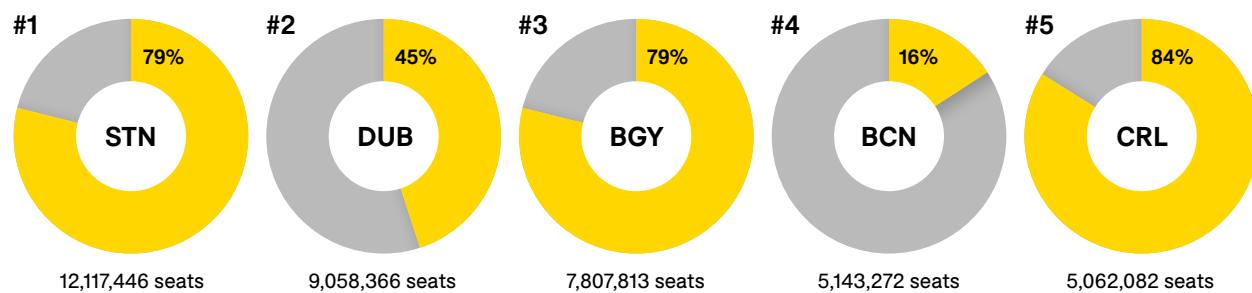
Fleet	Active	Unavailable*	On Order
Regional Jets/Props	0	0	0
Narrowbodies	310	10	188
Widebodies	0	0	0

*Includes out for maintenance, repair or in storage

Top 5 Country Markets by Airline Capacity



Top 5 Airports: Ranked by Seats & Showing Airline's Capacity Share % at Airport



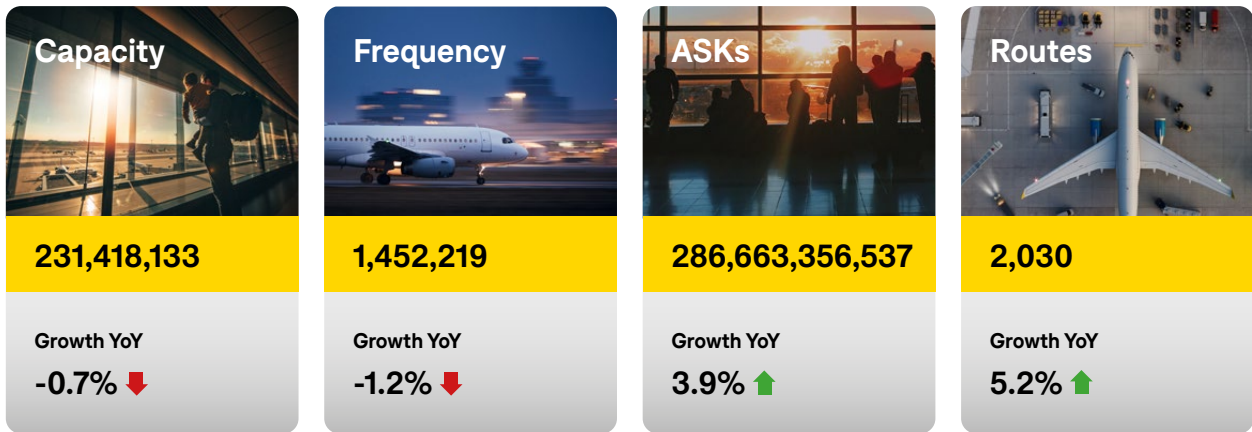
Top 5 Busiest Routes

International	Domestic
DUB-STN	MXP-CTA
LGW-DUB	FCO-CTA
MAN-DUB	PMO-FCO
STN-CIA	PMI-MAD
BHX-DUB	PMI-BCN

Key Takeaways:

- Under some pressure from shareholders, **Southwest is adjusting both its network and product offering**, in a bid to improve revenues and business performance.
- With **97% of its capacity in the US domestic market**, representing a nearly 10% capacity growth compared to pre-Covid 2019 levels, **Southwest remains the third largest airline in the world** despite not seeing any growth in 2024.
- The **airline has differing shares of market capacity** across its five largest bases, ranging from near total domination at Dallas Love Field (97%) through to Denver where the airline has 32% of the airport's capacity and competes head-to-head with United Airlines.

2024 in Stats

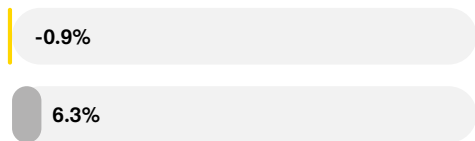


Domestic vs. International

Capacity by Type



Growth v 2023



● Domestic ● International

Capacity by Region

Region	2024	Growth v 2019	Share of Total	Change in Share v 2019
Africa	0	-	0.0%	-
Asia	0	-	0.0%	-
Europe	0	-	0.0%	-
Latin America	3,302,892	2.5%	1.4%	-0.1%
North America	228,115,241	9.8%	98.6%	0.1%
Middle East	0	-	0.0%	-
Southwest Pacific	0	-	0.0%	-

Average Airfares

Average Airfares*	Domestic	International
2023	0	0
2024	0	0

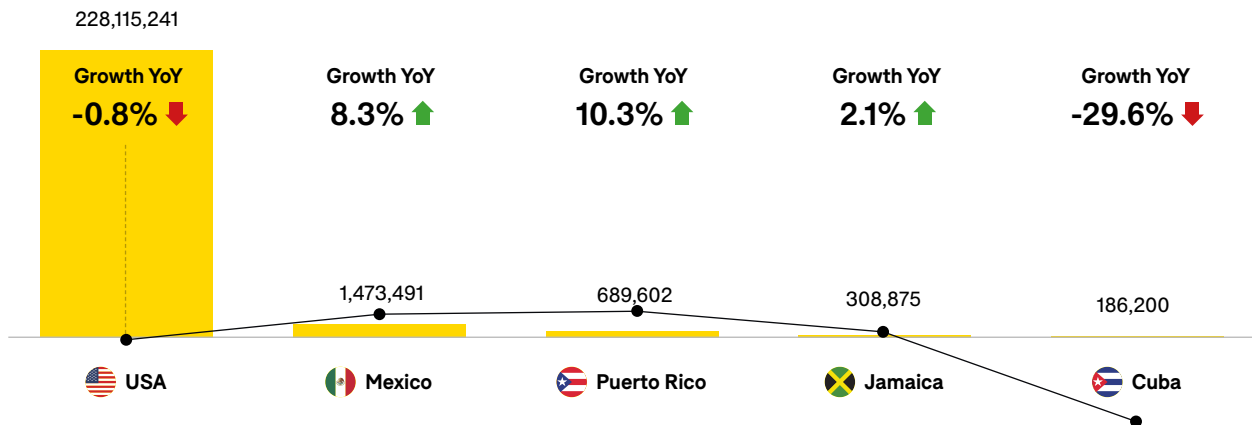
*Average 2024 cabin economy USD price at departure

Aircraft Fleet Composition

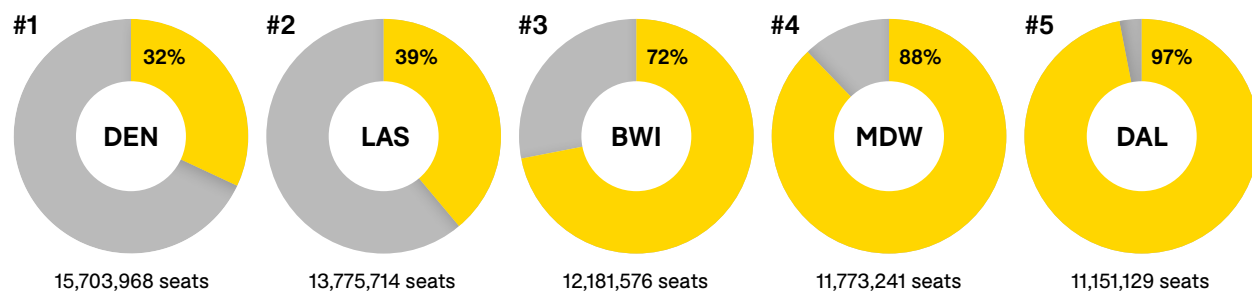
Fleet	Active	Unavailable*	On Order
Regional Jets/Props	0	0	0
Narrowbodies	775	36	466
Widebodies	0	0	0

*Includes out for maintenance, repair or in storage

Top 5 Country Markets by Airline Capacity



Top 5 Airports: Ranked by Seats & Showing Airline's Capacity Share % at Airport



Top 5 Busiest Routes

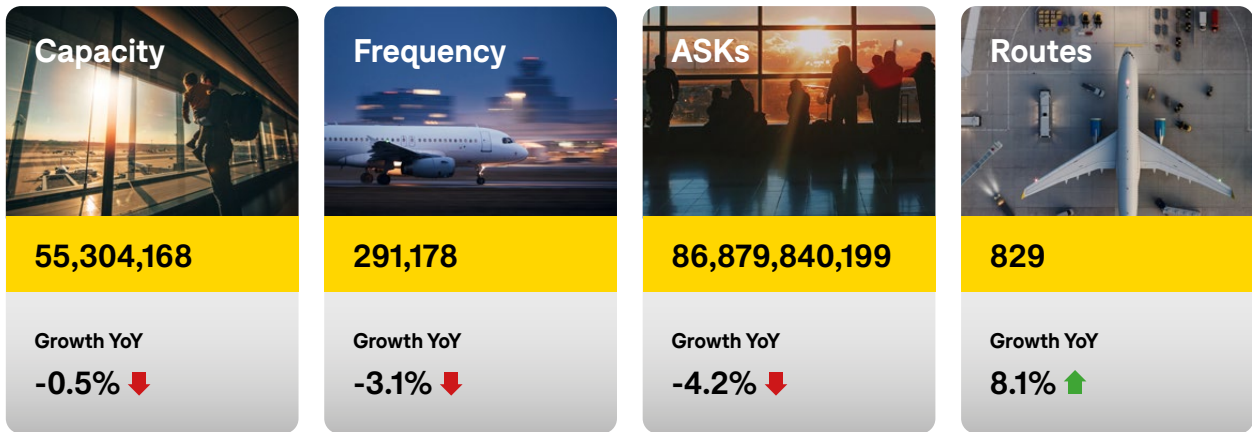
International	Domestic
SJU-MCO	BWI-MCO
CUN-HOU	PHX-DEN
BWI-SJU	OGG-HNL
BWI-MBJ	DAL-HOU
CUN-BWI	LAS-DEN



Key Takeaways:

- The information presented here predates [Spirit's Chapter 11 bankruptcy filing](#) in December 2024, and we anticipate substantial changes as the company restructures in 2025 and beyond.
- In 2024, **Spirit's key operating metrics were negative across capacity, frequency, and ASKs**, yet the airline experienced an **8% increase in the number of routes served**.
- This may indicate an **effort to refocus the business** and reduce dependency on specific markets. **International capacity declined by 17%** as the airline placed 85% of its capacity in the **US domestic market**.
- **Ft Lauderdale/Hollywood (FLL) remained the largest base** for Spirit through 2024 where the airline had a 31% share of all capacity, through which 15% of traffic was connecting to other routes.

2024 in Stats

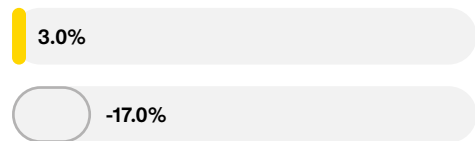


Domestic vs. International

Capacity by Type



Growth v 2023



● Domestic ● International

Capacity by Region

Region	2024	Growth v 2019	Share of Total	Change in Share v 2019
Africa	0	-	0.0%	-
Asia	0	-	0.0%	-
Europe	0	-	0.0%	-
Latin America	4,028,201	47.2%	7.3%	0.8%
North America	51,275,967	30.9%	92.7%	-0.8%
Middle East	0	-	0.0%	-
Southwest Pacific	0	-	0.0%	-

Average Airfares

Average Airfares*	Domestic	International
2023	222	304
2024	220	318

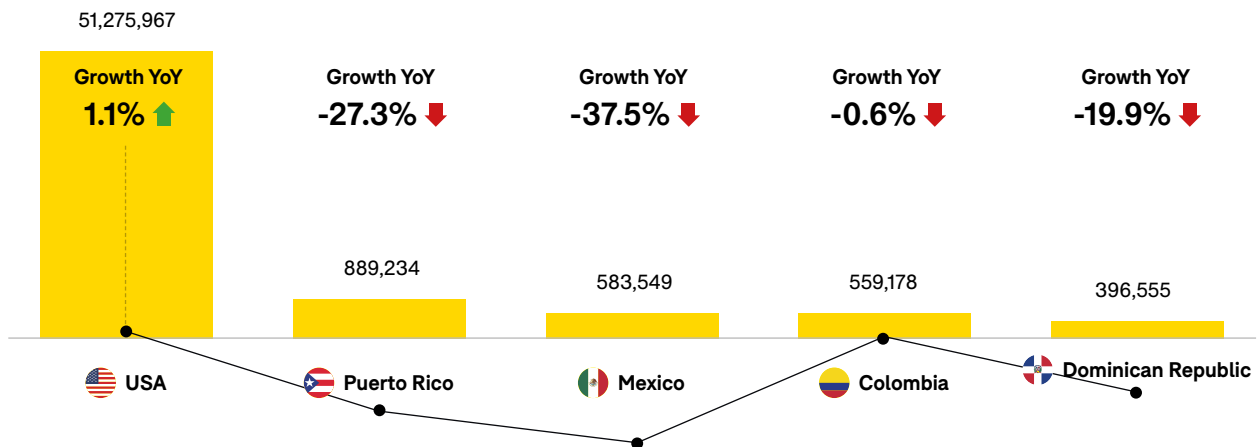
*Average 2024 cabin economy USD price at departure

Aircraft Fleet Composition

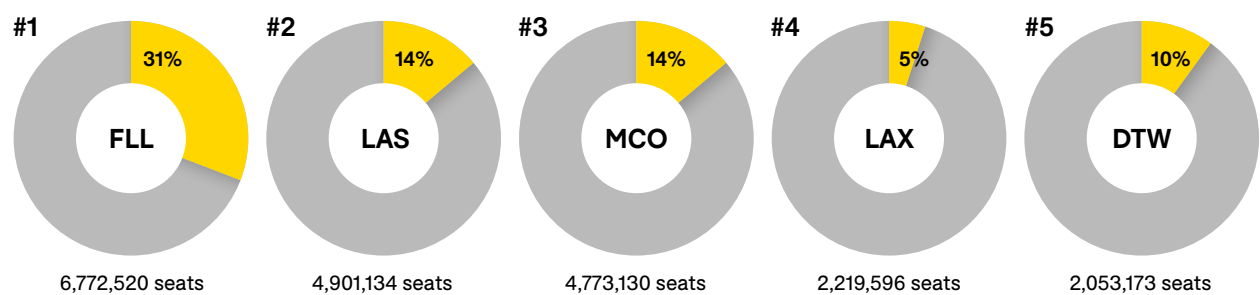
Fleet	Active	Unavailable*	On Order
Regional Jets/Props	0	0	0
Narrowbodies	182	35	56
Widebodies	0	0	0

*Includes out for maintenance, repair or in storage

Top 5 Country Markets by Airline Capacity



Top 5 Airports: Ranked by Seats & Showing Airline's Capacity Share % at Airport



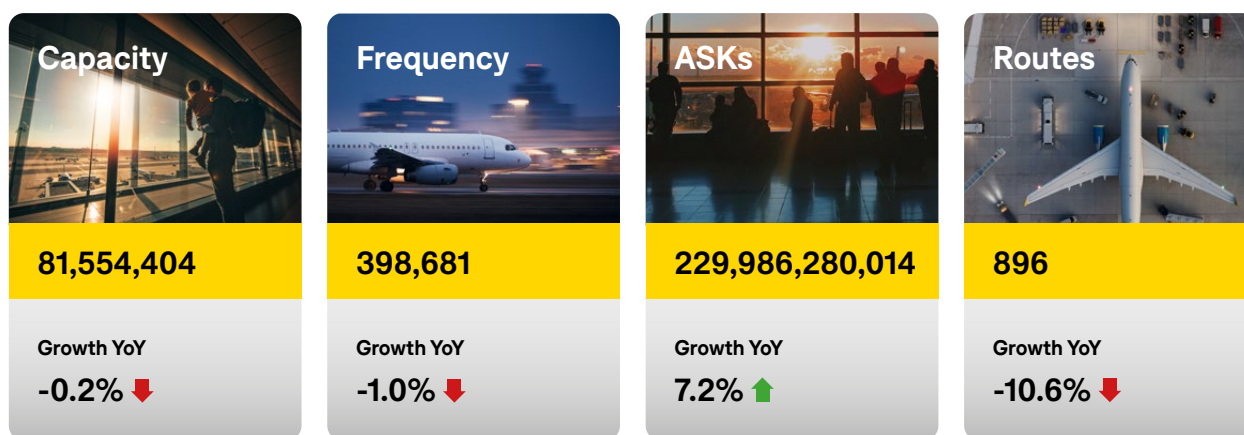
Top 5 Busiest Routes

International	Domestic
SJU-MCO	LGA-FLL
SJO-FLL	ATL-FLL
FLL-GUA	EWR-FLL
CUN-FLL	FLL-ORD
FLL-MDE	MCO-EWR

Key Takeaways:

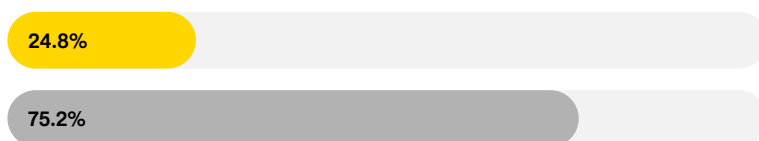
- Turkish Airlines **operates in more countries than any other airline** and ranks as the **12th largest carrier** by capacity, but it climbs to **ninth place when measured by ASKs** due to longer-than-average sector lengths.
- The airline expanded services to nearly all regional markets in 2024, from its **new and growing hub in Istanbul**, increasing capacity to the **USA and United Kingdom**.
- Turkish Airlines also faced some challenges in 2024 and reduced capacity to its second-largest market **Germany (-13% YoY)**; this reflects a **broader market weakness** in the German market also affecting other carriers.
- Holding an **80% share of capacity at Istanbul Airport (IST)**, Turkish dominates the local market and carries significant volumes of transfer traffic; two-thirds of all passengers in 2024 connected to other routes.
- **London Heathrow** is the largest **international market for Turkish Airlines**, served by multiple wide-bodied flights each day on the sector.

2024 in Stats



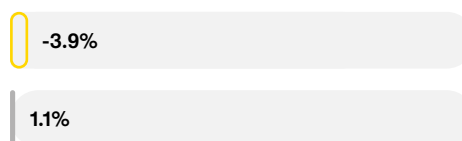
Domestic vs. International

Capacity by Type



● Domestic ● International

Growth v 2023



Capacity by Region

Region	2024	Growth v 2019	Share of Total	Change in Share v 2019
Africa	3,481,401	-	4.3%	-0.1%
Asia	4,944,689	29.3%	6.1%	1.1%
Europe	65,941,610	5.0%	80.9%	-1.1%
Latin America	1,241,203	122.0%	1.5%	0.8%
North America	2,499,576	86.6%	3.1%	1.3%
Middle East	3,396,071	-28.2%	4.2%	-2.0%
Southwest Pacific	49,098	-	0.1%	0.1%

Average Airfares

Average Airfares*	Domestic	International
2023	84	747
2024	110	799

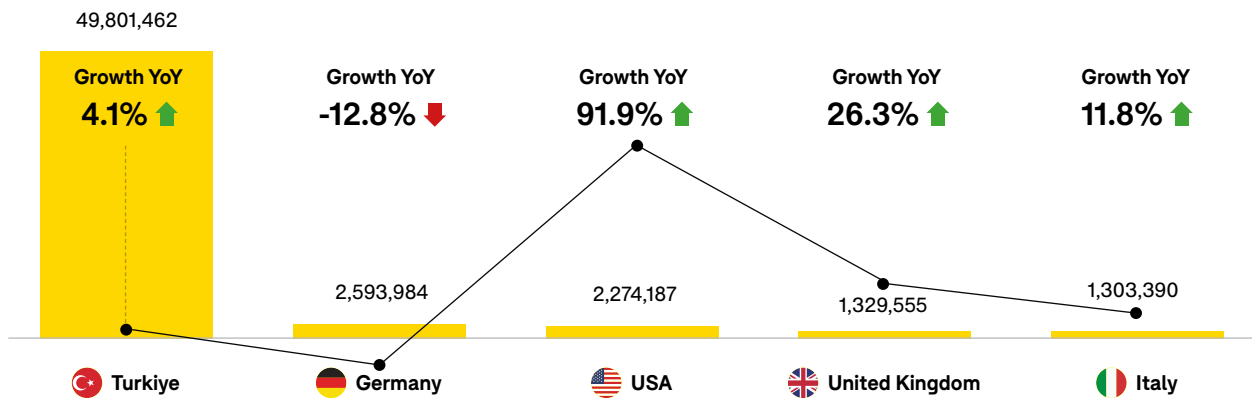
*Average 2024 cabin economy USD price at departure

Aircraft Fleet Composition

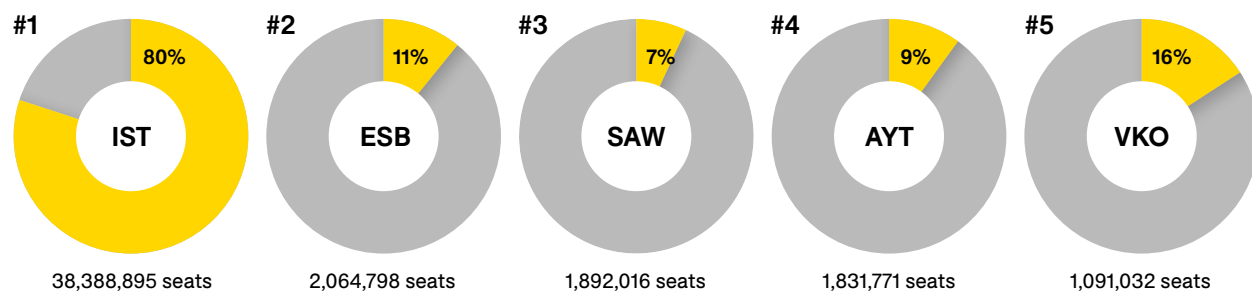
Fleet	Active	Unavailable*	On Order
Regional Jets/Props	0	0	0
Narrowbodies	221	64	189
Widebodies	136	14	97

*Includes out for maintenance, repair or in storage

Top 5 Country Markets by Airline Capacity



Top 5 Airports: Ranked by Seats & Showing Airline's Capacity Share % at Airport



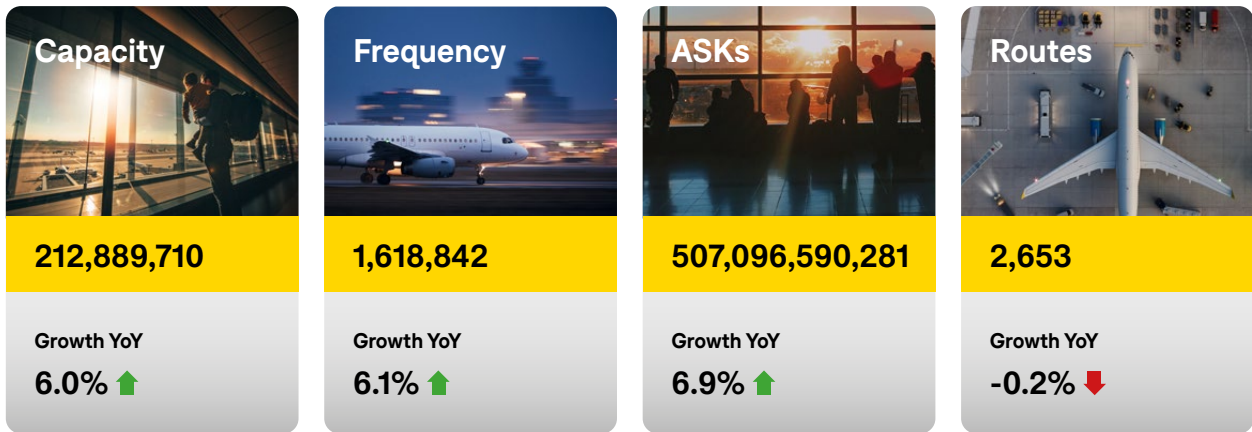
Top 5 Busiest Routes

International	Domestic
IST-LHR	BJV-IST
VKO-IST	IST-AYT
IST-CDG	IST-ADB
IST-AMS	ESB-IST
IST-DXB	GZT-IST

Key Takeaways:

- **United Airlines ranks #1 globally in Available Seat Kilometres (ASKs)**, ahead of its US competitors, and as the airline **continues to invest in long-haul services** through 2025 it is poised to maintain this leadership.
- **International capacity growth is triple domestic growth YoY**, as the airline **expands into Europe and Latin America** - this includes **low frequency and seasonal services** to secondary markets using their newer wide-bodied aircraft types, where operating costs can be very competitive.
- **Denver (DEN)** remains the largest base for United Airlines with over half (55%) of traffic connecting through the airport.
- Amongst the three legacy US airlines, **United had the highest average international economy class airfare in 2024** (US\$1,005) despite a 10% decrease YoY, reflecting a softening market after the post-pandemic boom.

2024 in Stats

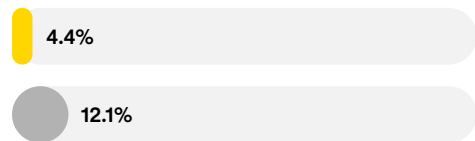


Domestic vs. International

Capacity by Type



Growth v 2023



● Domestic ● International

Capacity by Region

Region	2024	Growth v 2019	Share of Total	Change in Share v 2019
Africa	270,986	-	0.1%	0.1%
Asia	3,214,980	-5.0%	1.5%	-0.2%
Europe	6,767,555	25.8%	3.2%	0.5%
Latin America	9,834,506	27.9%	4.6%	0.8%
North America	190,628,623	5.3%	89.5%	-1.1%
Middle East	181,677	-51.9%	0.1%	-0.1%
Southwest Pacific	1,991,383	13.8%	0.9%	0.1%

Average Airfares

Average Airfares*	Domestic	International
2023	453	1109
2024	409	1005

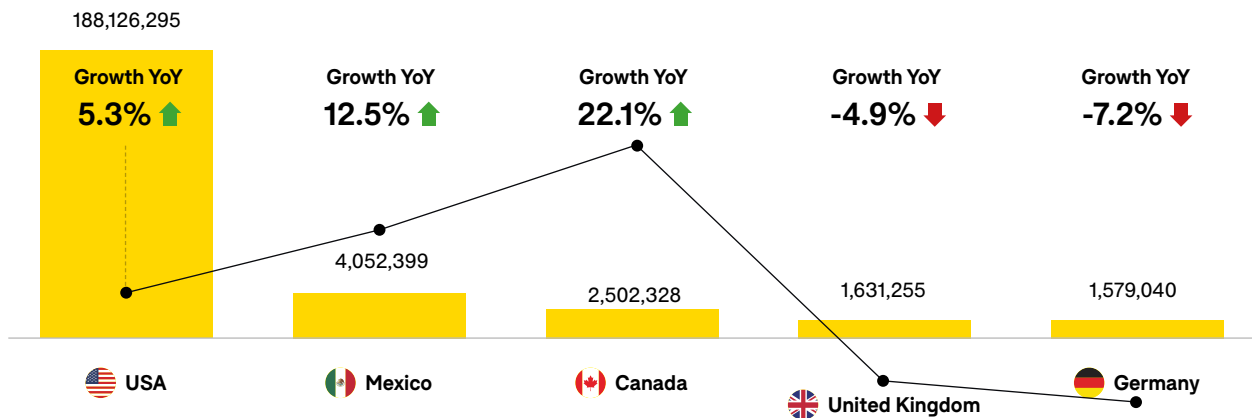
*Average 2024 cabin economy USD price at departure

Aircraft Fleet Composition

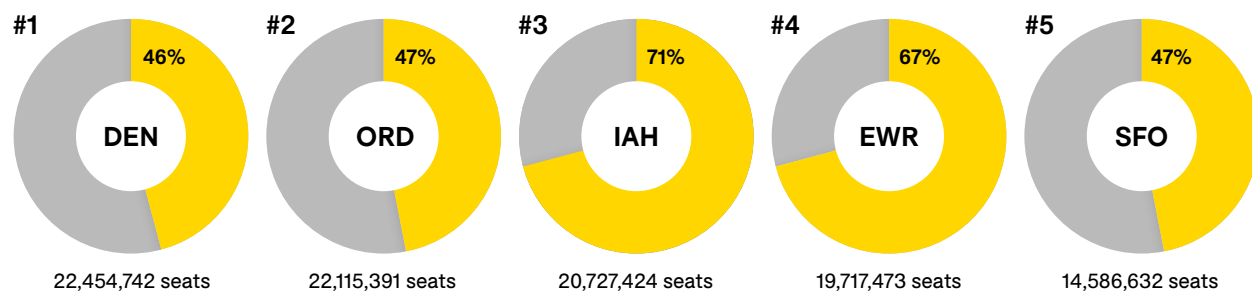
Fleet	Active	Unavailable*	On Order
Regional Jets/Props	0	0	0
Narrowbodies	701	53	487
Widebodies	203	18	194

*Includes out for maintenance, repair or in storage

Top 5 Country Markets by Airline Capacity



Top 5 Airports: Ranked by Seats & Showing Airline's Capacity Share % at Airport



Top 5 Busiest Routes

International	Domestic
IAH-CUN	EWR-LAX
EWR-LHR	SFO-ORD
IAH-MEX	DEN-ORD
SFO-LHR	DEN-IAH
HKG-SFO	EWR-SFO

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