

OAG[®]take-off

essential metrics on the
world's major airlines



Top 20 carriers based on 12 months'
seat capacity to February 2017



essential metrics decoded

About OAG take-off

- **Schedules Analyser: 12 months to February 2017.**
- **Traffic Analyser: 12 months to October 2016.**
- **Estimated Bookings Load Factor:** bookings divided by seats to represent an estimated bookings load factor (excludes account non-revenue passengers). Both data sets -12 months to October 2016.
- **Number of Routes served:** 12 months to February 2017.
- **Number of Countries served:** 12 months to February 2017.
- **Net New Routes:** number of new destinations less destinations no longer served in a 12 month period (excludes routes with less than 100 frequencies in a 12 month period).
- **OTP data:** OAG's Flight Status database (12 months to January 2017). Where average coverage falls below OAG's 80% threshold, a carrier's entry has been recorded as N/A.
- **Network section:** fastest growing country is the Top 10 country markets served by that carrier.
- **Key metrics section:** the number of routes are those operated from each of the Top 3 airports by carrier in a 12 month period.
- **Fleet data:** CAPA (www.centreforaviation.com as of February 2017). Narrow-body fleet and aircraft on order figures include regional jets. Freighters are excluded.
- *American Airlines and US Airways merged in October 2015 and the effect of this can be seen on the American Airlines capacity by month chart.*
- *The LATAM Airlines Group includes the following airlines: LA, JJ, 4M, LP, 4C, LU, PZ & XL.*

Rank	Airline	Seats (Mar16-Feb17)
1	American Airlines	250,762,625
2	Delta Air Lines	223,949,810
3	Southwest Airlines	195,875,573
4	United Airlines	177,028,403
5	Ryanair	126,503,181
6	China Southern Airlines	115,763,222
7	China Eastern Airlines	109,950,331
8	Turkish Airlines	84,318,540
9	easyJet	82,644,804
10	Lufthansa German Airlines	82,636,538
11	Air China	80,370,497
12	LATAM Airlines Group	80,610,826
13	Emirates	75,957,082
14	All Nippon Airways	73,274,937
15	British Airways	61,978,149
16	Air Canada	58,144,941
17	Air France	57,751,069
18	Japan Airlines	50,992,135
19	Lion Air	48,557,485
20	Aeroflot Russian Airlines	47,060,867

Business overview

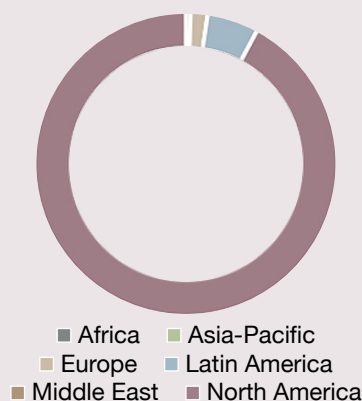
Global Ranking (seats)	1
Ownership	Publicly listed
Alliance Membership	oneworld (founder member)
Domicile	USA
Carrier Type (OAG category)	Mainline

Network

Extensive US domestic network:
83% of capacity is in US

Fastest growing region:
North America

Fastest growing country pair:
US – Australia



Network key metrics

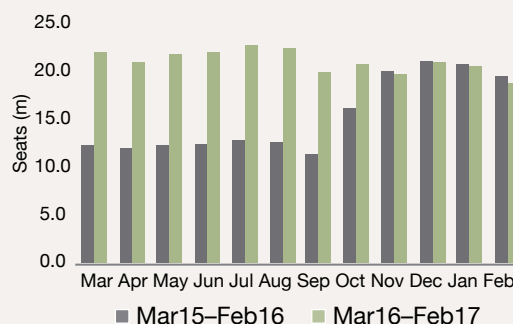
Top 3 Airports	Seats	Share of Airport Capacity	Routes
DFW	32,789,312	84.80%	204
CLT	24,763,989	90.80%	153
MIA	17,258,562	67.70%	134

Top 3 Routes	Passenger Bookings	Average Bookings per day
LGA-ORD	916,367	2,504
JFK-LAX	825,251	2,255
LGA-MIA	809,445	2,212

KPIs

Routes Operated	1,003	Passengers Carried	201,837,168
Seats	250,762,625	Average Bookings Load Factor	80%
Flights	2,300,432	OTP (last 12 months)	78.40%
Average Seats/Aircraft	109	Average Stage Length	1,898km
ASKs	443,449m	Average Flight Time (hh:mm)	02:23
Net New Routes	47	Countries Served	57

Capacity



Year-on-Year Growth

37%



Fleet and orders as of February 2017

934 aircraft in the fleet
285 aircraft on order – predominantly narrow-body aircraft

Type	In Use	On Order
Narrow-body	789	245
Wide-body	145	40

Average fleet age is 10.3 years – the youngest fleet of the big US carriers, although this is slightly below the average of the Top 20 which is 9.2 years.

OAG's take on...

American Airlines is the biggest airline globally on the basis of seat volume. Year-on-year seat growth takes into account the transfer of US Airways capacity – growth without US Airways is -0.2%. The carrier has the second largest number of aircraft on order of all the Top 20 airlines.

Business overview

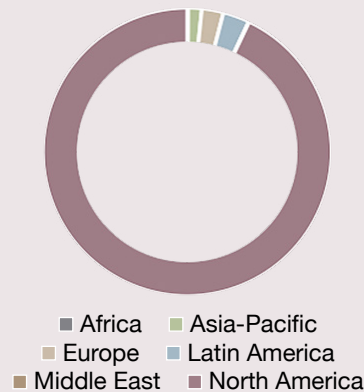
Global Ranking (seats)	2
Ownership	Publicly listed
Alliance Membership	SkyTeam (founder member)
Domicile	USA
Carrier Type (OAG category)	Mainline

Network

Extensive US domestic network:
85% of capacity is in US

Fastest growing region:
Caribbean

Fastest growing country pair:
US – Iceland



Network key metrics

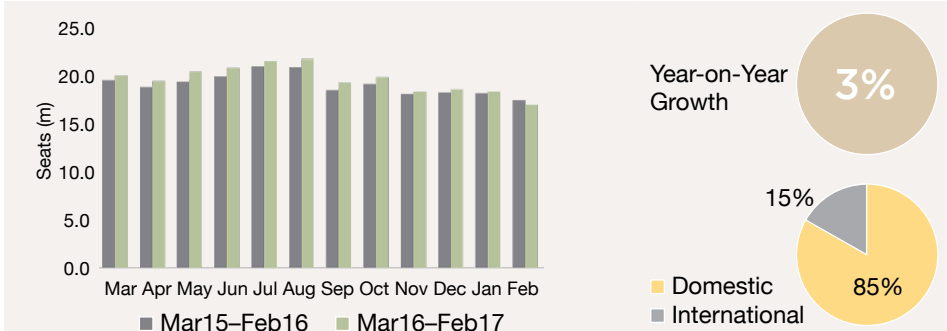
Top 3 Airports	Seats	Share of Airport Capacity	Routes
ATL	47,304,314	78.70%	236
MSP	15,550,503	70.60%	151
DTW	15,253,478	73.50%	135

Top 3 Routes	Passenger Bookings	Average Bookings per day
JFK-LAX	812,273	2,219
ATL-LGA	792,171	2,164
JFK-SFO	647,223	1,768

KPIs

Routes Operated	911	Passengers Carried	183,072,324
Seats	223,949,810	Average Bookings Load Factor	82%
Flights	1,893,765	OTP (last 12 months)	83.80%
Average Seats/Aircraft	118	Average Stage Length	2,123 km
ASKs	404,720m	Average Flight Time (hh:mm)	02:28
Net New Routes	15	Countries Served	67

Capacity



Fleet and orders as of February 2017

847 aircraft in the fleet 239 aircraft on order – predominantly narrow-body aircraft	Type	In Use	On Order
	Narrow-body	697	188
	Wide-body	150	51

Delta's average fleet age is 17.2 years. This is the oldest of the Top 20, pushed up by the age of wide-body aircraft – DL still has seven 747s in the fleet with an average age of 25 years, and its B767 fleet has an average age of 20 years.

OAG's take on...

The Delta Air Lines network is based on an effective hub operation and the carrier dominates at the main airports into which it operates. Delta is taking steps to grow beyond its current borders evidenced by its recent JV with Aeromexico and rekindling of a partnership with Korean Air.

Business overview

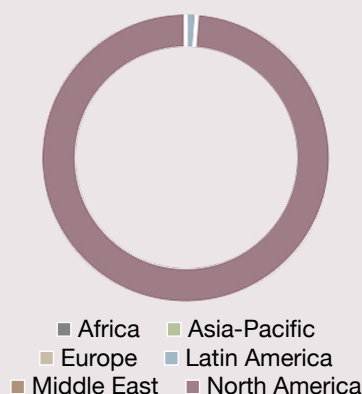
Global Ranking (seats)	3
Ownership	Publicly listed
Alliance Membership	None
Domicile	USA
Carrier Type (OAG category)	Low-cost

Network

Almost entirely US network

Fastest growing region:
Central America

Fastest growing country pair:
US – Belize



Network key metrics

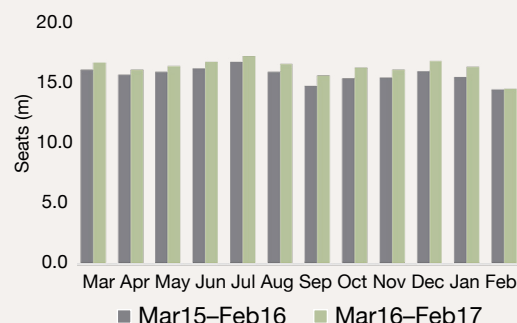
Top 3 Airports	Seats	Share of Airport Capacity	Routes
MDW	12,758,450	93.50%	73
LAS	11,367,306	41.10%	62
BWI	11,002,238	70.50%	66

Top 3 Routes	Passenger Bookings	Average Bookings per day
DAL-HOU	937,663	2,562
BUR-OAK	728,888	1,991
BWI-MCO	674,536	1,843

KPIs

Routes Operated	699	Passengers Carried	147,858,774
Seats	195,875,573	Average Bookings Load Factor	76%
Flights	1,328,086	OTP (last 12 months)	80.50%
Average Seats/Aircraft	147	Average Stage Length	1,544 km
ASKs	242,106m	Average Flight Time (hh:mm)	02:08
Net New Routes	29	Countries Served	10

Capacity



Year-on-Year Growth

4%

3%

Domestic
International

97%

Fleet and orders as of February 2017

722 aircraft in the fleet
262 aircraft on order –
exclusively narrow-body single
aircraft fleet of 737 aircraft

Type	In Use	On Order
Narrow-body	722	262
Wide-body	0	0

Southwest's average fleet age is 11.7 years.

OAG's take on...

Southwest is the largest low-cost carrier in the world operating an entirely narrow-body fleet. It remains unaligned (i.e. not part of an alliance) and continues to grow, particularly on international routes, which have grown capacity by 24% in the last 12 months.

Business overview

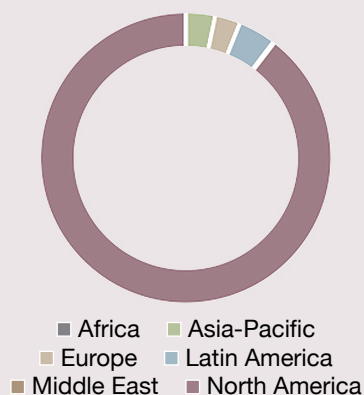
Global Ranking (seats)	4
Ownership	Publicly listed
Alliance Membership	Star Alliance (founder member)
Domicile	USA
Carrier Type (OAG category)	Mainline

Network

Extensive US domestic network but most international capacity of US majors

Fastest growing region:
Eastern Europe

Fastest growing country pair:
US – Cuba



Network key metrics

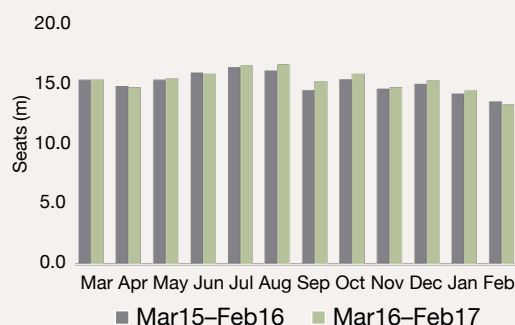
Top 3 Airports	Seats	Share of Airport Capacity	Routes
ORD	20,187,360	43.80%	218
IAH	18,742,934	76.50%	223
EWR	16,617,321	67.90%	191

Top 3 Routes	Passenger Bookings	Average Bookings per day
EWR-SFO	1,088,562	2,974
EWR-LAX	990,730	2,707
ORD-SFO	728,285	1,990

KPIs

Routes Operated	897	Passengers Carried	148,645,366
Seats	177,028,403	Average Bookings Load Factor	84%
Flights	1,647,475	OTP (last 12 months)	78.80%
Average Seats/Aircraft	107	Average Stage Length	2,025 km
ASKs	412,222m	Average Flight Time (hh:mm)	02:46
Net New Routes	5	Countries Served	70

Capacity



Year-on-Year Growth

1%



Fleet and orders as of February 2017

733 aircraft in the fleet
264 aircraft on order – predominantly narrow-body aircraft

Type	In Use	On Order
Narrow-body	556	193
Wide-body	177	71

Average fleet age is 14.2 years.

OAG's take on...

Relative to other airlines in the Top 20, the average size of aircraft in the United Airlines fleet is small. The fleet is ageing now but there are a large number of new aircraft on order to replace them.

Business overview

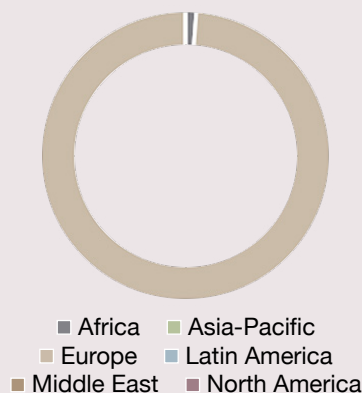
Global Ranking (seats)	5
Ownership	Publicly listed
Alliance Membership	None
Domicile	Ireland
Carrier Type (OAG category)	Low-cost

Network

Almost entirely European network

Fastest growing region:
Eastern Europe

Fastest growing country pair:
Bulgaria – Germany



Network key metrics

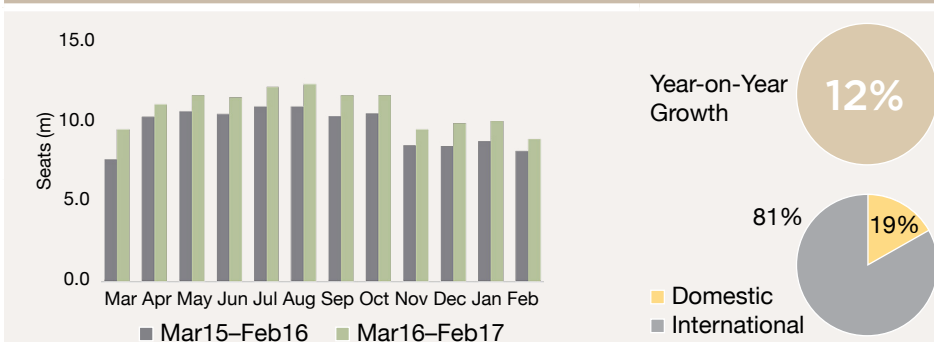
Top 3 Airports	Seats	Share of Airport Capacity	Routes
STN	11,251,737	81.40%	139
DUB	7,184,457	42.80%	94
BGY	5,246,451	82.20%	76

Top 3 Routes	Passenger Bookings	Average Bookings per day
ATH-SKG	877,456	2,397
DUB-STN	789,638	2,157
CTA-FCO	745,111	2,036

KPIs

Routes Operated	1,319	Passengers Carried	111,255,449
Seats	126,503,181	Average Bookings Load Factor	91%
Flights	669,329	OTP (last 12 months)	85.30%
Average Seats/Aircraft	189	Average Stage Length	1,497 km
ASKs	154,336m	Average Flight Time (hh:mm)	02:13
Net New Routes	66	Countries Served	33

Capacity



Fleet and orders as of February 2017

371 aircraft in the fleet
192 aircraft on order – exclusively narrow-body aircraft

Type	In Use	On Order
Narrow-body	371	192
Wide-body	0	0

Average fleet age is 6.7 years.

OAG's take on...

Ryanair operates the largest number of routes of any carrier in the Top 20 and has added the most new routes in the past year. Load factors are higher than any other carrier in this group, exceeding 90%.

Business overview

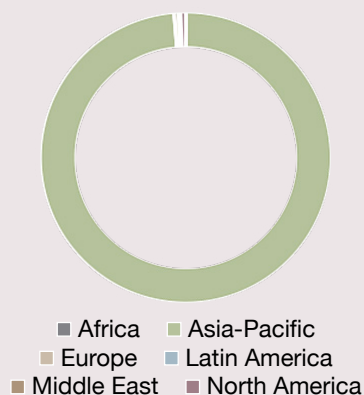
Global Ranking (seats)	6
Ownership	Mix of state & publicly-listed ownership
Alliance Membership	SkyTeam
Domicile	China
Carrier Type (OAG category)	Mainline

Network

Mainly Chinese network with 85% of capacity in China

Fastest growing region:
South Asia

Fastest growing country pair:
China – Azerbaijan



Network key metrics

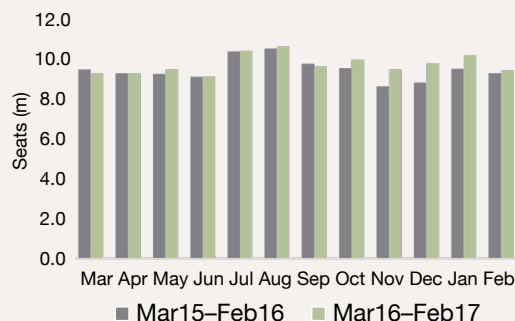
Top 3 Airports	Seats	Share of Airport Capacity	Routes
CAN	18,202,829	48.40%	134
PEK	8,753,746	14.70%	46
SZX	6,034,793	24.00%	61

Top 3 Routes	Passenger Bookings	Average Bookings per day
CAN-PEK	1,663,863	4,546
CAN-SHA	1,238,520	3,384
PEK-SZX	853,503	2,332

KPIs

Routes Operated	710	Passengers Carried	83,536,357
Seats	115,763,222	Average Bookings Load Factor	74%
Flights	709,294	OTP (last 12 months)	68.30%
Average Seats/Aircraft	163	Average Stage Length	1,630 km
ASKs	186,269m	Average Flight Time (hh:mm)	02:35
Net New Routes	-1	Countries Served	47

Capacity



Year-on-Year Growth

3%



15%

85%

Fleet and orders as of February 2017

505 aircraft in the fleet
168 aircraft on order –
predominantly narrow-body aircraft

Type	In Use	On Order
Narrow-body	439	136
Wide-body	66	32

Average fleet age is 7.1 years. China Southern has the biggest fleet order of the Chinese carriers in this Top 20 series.

OAG's take on...

While there is plenty of international focus on China's largest carrier, the airline is predominantly a domestic carrier with 85% of capacity in the domestic market. China Southern has ambitious plans to grow, evidenced by its large aircraft order book.

Business overview

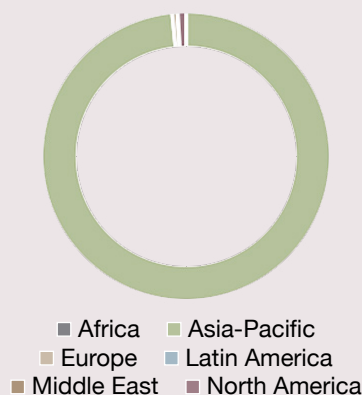
Global Ranking (seats)	7
Ownership	Mix of state & publicly-listed ownership
Alliance Membership	SkyTeam
Domicile	China
Carrier Type (OAG category)	Mainline

Network

Over 80% of capacity in China, and remainder almost all in Asia-Pacific

Fastest growing region:
South Asia

Fastest growing country pair:
China – New Zealand



Network key metrics

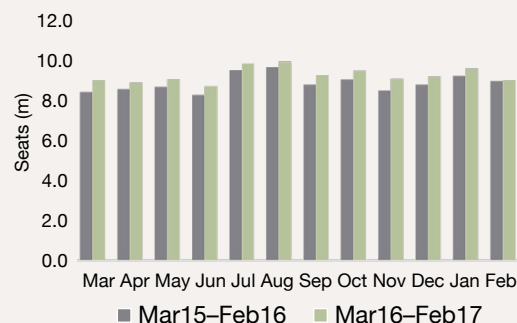
Top 3 Airports	Seats	Share of Airport Capacity	Routes
PVG	11,776,832	28.10%	115
KMG	9,510,138	38.20%	90
SHA	7,784,794	31.50%	57

Top 3 Routes	Passenger Bookings	Average Bookings per day
PEK-SHA	2,504,270	6,842
SHA-SZX	1,000,453	2,733
JHG-KMG	840,262	2,296

KPIs

Routes Operated	701	Passengers Carried	78,875,613
Seats	109,950,331	Average Bookings Load Factor	73%
Flights	672,935	OTP (last 12 months)	63.50%
Average Seats/Aircraft	163	Average Stage Length	1,573 km
ASKs	158,845m	Average Flight Time (hh:mm)	02:23
Net New Routes	38	Countries Served	36

Capacity



Year-on-Year Growth

4%



Fleet and orders as of February 2017

453 aircraft in the fleet
164 aircraft on order – predominantly narrow-body aircraft

Type	In Use	On Order
Narrow-body	392	125
Wide-body	61	39

Average fleet age is 5.5 years. China Eastern has the youngest fleet of Chinese carriers in this Top 20 series, and the second youngest fleet of the Top 20.

OAG's take on...

China Eastern Airlines benefits from a younger fleet than the other Chinese major carriers. With ambitious growth plans, it has the second highest number of net new routes – 38 – in the Top 20.

Business overview

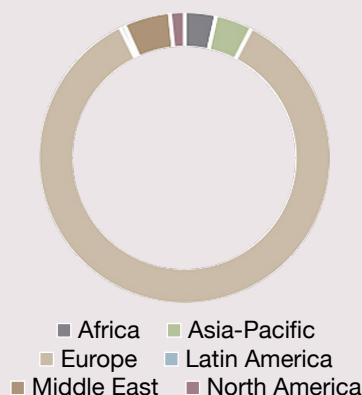
Global Ranking (seats)	8
Ownership	Mix of state & publicly-listed ownership
Alliance Membership	Star Alliance
Domicile	Turkey
Carrier Type (OAG category)	Mainline

Network

40% of capacity in domestic market and significant network in rest of Europe as well as Africa, Middle East and Asia-Pacific

Fastest growing region: Southern Africa

Fastest growing country pair: Mauritius – Madagascar



Network key metrics

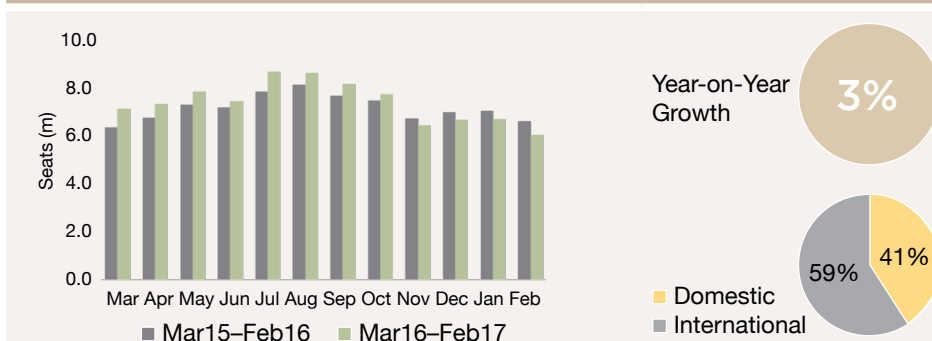
Top 3 Airports	Seats	Share of Airport Capacity	Routes
IST	30,755,665	76.30%	261
ESB	6,363,878	75.20%	49
SAW	5,773,910	30.50%	63

Top 3 Routes	Passenger Bookings	Average Bookings per day
ESB-SAW	690,043	1,885
ESB-IST	441,764	1,207
ADB-IST	424,033	1,159

KPIs

Routes Operated	407	Passengers Carried	65,796,474
Seats	84,318,540	Average Bookings Load Factor	77%
Flights	457,209	OTP (last 12 months)	77.60%
Average Seats/Aircraft	184	Average Stage Length	2,151 km
ASKs	168,779m	Average Flight Time (hh:mm)	02:53
Net New Routes	21	Countries Served	117

Capacity



Fleet and orders as of February 2017

265 aircraft in the fleet
168 aircraft on order – almost all narrow-body aircraft

Type	In Use	On Order
Narrow-body	192	167
Wide-body	73	1

Average fleet age is 6 years.

OAG's take on...

Turkish Airlines operates to more countries than any other airline, 117 in all. The large order for narrow-body aircraft highlights the focus on growth in domestic and regional markets.

Business overview

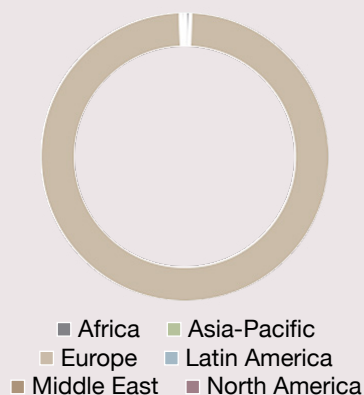
Global Ranking (seats)	9
Ownership	Publicly listed
Alliance Membership	None
Domicile	UK
Carrier Type (OAG category)	Low-cost

Network

Extensive European network

Fastest growing region:
Western Europe

Fastest growing country pair:
Spain – Netherlands



Network key metrics

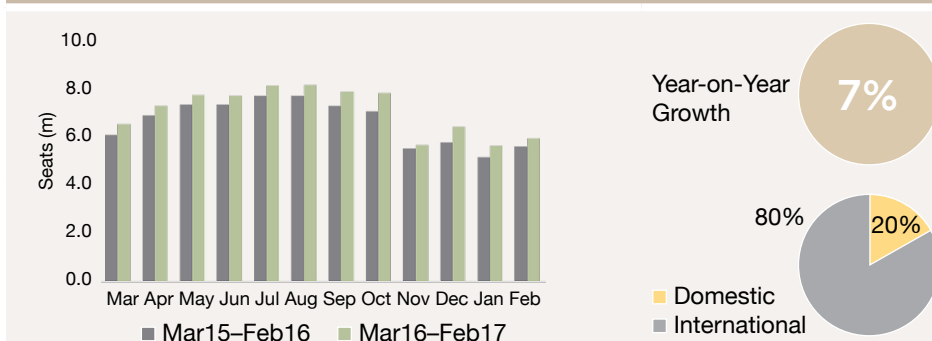
Top 3 Airports	Seats	Share of Airport Capacity	Routes
LGW	9,920,448	39.40%	113
GVA	4,142,700	37.70%	75
MXP	3,914,028	30.70%	57

Top 3 Routes	Passenger Bookings	Average Bookings per day
AMS-LGW	723,644	1,977
GVA-LGW	672,285	1,837
CDG-MXP	670,632	1,832

KPIs

Routes Operated	678	Passengers Carried	69,114,266
Seats	82,644,804	Average Bookings Load Factor	85%
Flights	498,365	OTP (last 12 months)	75.10%
Average Seats/Aircraft	166	Average Stage Length	1,374 km
ASKs	90,108m	Average Flight Time (hh:mm)	02:01
Net New Routes	6	Countries Served	32

Capacity



Fleet and orders as of February 2017

236 aircraft in the fleet
161 aircraft on order –
exclusively narrow-body aircraft

Type	In Use	On Order
Narrow-body	236	161
Wide-body	0	0

Average fleet age is 7.2 years.

OAG's take on...

Europe's second largest low-cost carrier continues to make solid growth across Europe. Much of its aircraft order book is for A320neos which will allow easyJet to operate even more efficiently.

Business overview

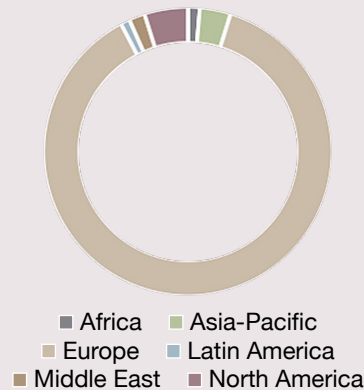
Global Ranking (seats)	10
Ownership	Publicly listed
Alliance Membership	Star Alliance (founder member)
Domicile	Germany
Carrier Type (OAG category)	Mainline

Network

22% of capacity is in domestic market and Europe accounts for most of network although some capacity to other regions

Fastest growing region:
Eastern Africa

Fastest growing country pair:
Germany – Kenya



Network key metrics

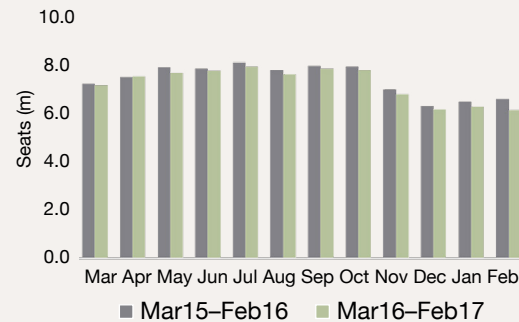
Top 3 Airports	Seats	Share of Airport Capacity	Routes
FRA	25,720,828	64.50%	174
MUC	15,904,159	55.00%	141
TXL	1,825,762	12.90%	2

Top 3 Routes	Passenger Bookings	Average Bookings per day
FRA-TXL	818,543	2,236
HAM-MUC	718,680	1,964
MUC-TXL	706,852	1,931

KPIs

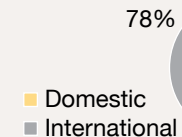
Routes Operated	291	Passengers Carried	64,051,143
Seats	82,636,538	Average Bookings Load Factor	77%
Flights	492,730	OTP (last 12 months)	82.40%
Average Seats/Aircraft	168	Average Stage Length	2,869 km
ASKs	185,102m	Average Flight Time (hh:mm)	02:24
Net New Routes	-8	Countries Served	78

Capacity



Year-on-Year Growth

-2%



Fleet and orders as of February 2017

262 aircraft in the fleet
158 aircraft on order – mix of narrow and wide-body aircraft

Type	In Use	On Order
Narrow-body	159	100
Wide-body	103	58

Average fleet age is 11.1 years. This is comparable to Lufthansa's European peers but above the average of 9.2 years for the Top 20.

OAG's take on...

The last year has seen Lufthansa contract in terms of capacity and network. Lufthansa has a strong aircraft order book with 25 of its wide-body aircraft order for the A350, reflecting its long-haul ambitions.

Business overview

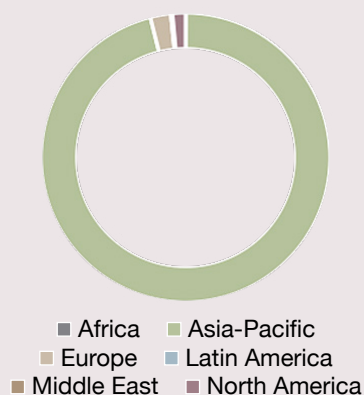
Global Ranking (seats)	11
Ownership	Mix of state & publicly-listed ownership
Alliance Membership	Star Alliance
Domicile	China
Carrier Type (OAG category)	Mainline

Network

Mostly Asia-Pacific network
with 79% of capacity in China's
domestic market

Fastest growing region:
Caribbean (via Canada)

Fastest growing country pair:
China – New Zealand



Network key metrics

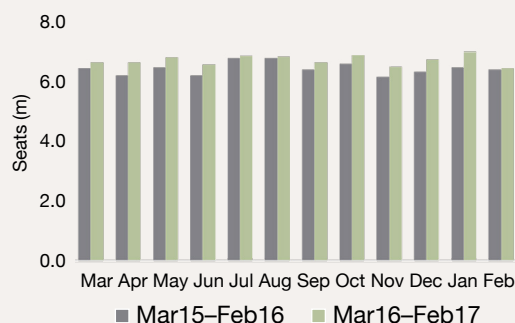
Top 3 Airports	Seats	Share of Airport Capacity	Routes
PEK	22,261,003	37.90%	150
CTU	7,405,941	27.80%	74
CKG	2,977,868	14.80%	34

Top 3 Routes	Passenger Bookings	Average Bookings per day
CTU-PEK	1,738,546	4,750
PEK-SHA	1,719,640	4,698
PEK-SZX	1,132,637	3,095

KPIs

Routes Operated	445	Passengers Carried	60,393,969
Seats	80,370,497	Average Bookings Load Factor	76%
Flights	445,493	OTP (last 12 months)	65.50%
Average Seats/Aircraft	180	Average Stage Length	2,037 km
ASKs	159,514m	Average Flight Time (hh:mm)	02:59
Net New Routes	28	Countries Served	42

Capacity



Year-on-Year
Growth

4%

21%
Domestic
79%
International

Fleet and orders as of February 2017

385 aircraft in the fleet
91 aircraft on order –
mix of narrow and wide-body
aircraft

Type	In Use	On Order
Narrow-body	283	58
Wide-body	102	33

Average fleet age is 6.7 years.

OAG's take on...

Beijing Capital Airport is the focus of the Air China network with over half of all capacity operating to or from this airport. 79% of capacity is in the Chinese domestic market.

Business overview

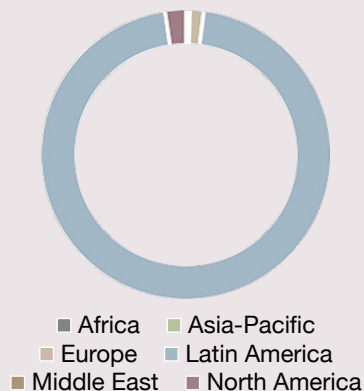
Global Ranking (seats)	12
Ownership	Publicly listed
Alliance Membership	oneworld
Domicile	Brazil/Chile
Carrier Type (OAG category)	Mainline

Network

Extensive Latin American network with 9% of capacity in the continent

Fastest growing region:
Southern Africa

Fastest growing country pair:
Peru – Uruguay



Network key metrics

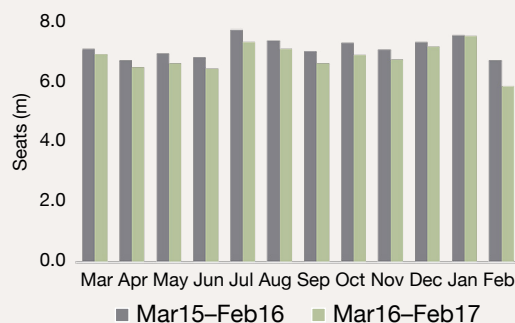
Top 3 Airports	Seats	Share of Airport Capacity	Routes
GRU	8,014,690	36.80%	111
SCL	7,458,537	65.20%	78
LIM	6,073,251	50.00%	88

Top 3 Routes	Passenger Bookings	Average Bookings per day
CGH-SDU	1,774,280	4,848
CUZ-LIM	1,306,883	3,571
ANF-SCL	1,096,691	2,996

KPIs

Routes Operated	299	Passengers Carried	65,023,278
Seats	80,610,826	Average Bookings Load Factor	79%
Flights	463,310	OTP (last 12 months)	N/A
Average Seats/Aircraft	174	Average Stage Length	2,101 km
ASKs	132,987m	Average Flight Time (hh:mm)	02:22
Net New Routes	-5	Countries Served	28

Capacity



Year-on-Year Growth

-5%

22% Domestic
78% International

Fleet and orders as of February 2017

314 aircraft in the fleet
83 aircraft on order – mix of narrow and wide-body aircraft

Type	In Use	On Order
Narrow-body	237	54
Wide-body	77	29

Average fleet age is 7.3 years.

OAG's take on...

The LATAM Airlines Group has gone through a complex merger between two of Latin America's largest carriers during the period highlighted above and has been impacted by economic challenges in Brazil.

Business overview

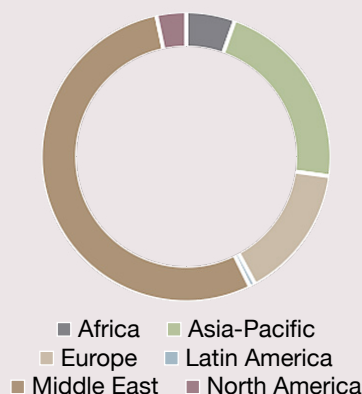
Global Ranking (seats)	13
Ownership	State-owned
Alliance Membership	None
Domicile	United Arab Emirates
Carrier Type (OAG category)	Mainline

Network

Most geographically diverse network, located at crossroads of Africa, Middle East, Asia-Pacific and Europe

Fastest growing region:
Eastern Europe

Fastest growing country pair:
UAE – Malta



Network key metrics

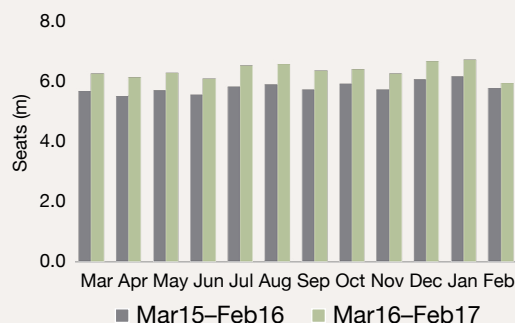
Top 3 Airports	Seats	Share of Airport Capacity	Routes
DXB	35,410,366	62.40%	132
BKK	1,416,642	3.80%	3
LHR	1,105,932	2.30%	1

Top 3 Routes	Passenger Bookings	Average Bookings per day
DXB-KWI	638,018	1,743
DXB-KHI	611,173	1,670
DXB-LHR	598,302	1,635

KPIs

Routes Operated	154	Passengers Carried	55,482,912
Seats	75,957,082	Average Bookings Load Factor	75%
Flights	194,509	OTP (last 12 months)	78.70%
Average Seats/Aircraft	391	Average Stage Length	5,008 km
ASKs	359,319m	Average Flight Time (hh:mm)	06:05
Net New Routes	8	Countries Served	76

Capacity



Year-on-Year Growth

10%

Domestic
International

100%

Fleet and orders as of February 2017

241 aircraft in the fleet
223 aircraft on order – exclusively wide-body aircraft

Type	In Use	On Order
Narrow-body	0	0
Wide-body	241	223

Average fleet age is 5.5 years. Emirates has the second-youngest fleet in the Top 20 and the largest wide-body fleet and orders.

OAG's take on...

Emirates operates the longest average sector length of any of the Top 20 airlines and with an average flight of over 6 hours. The fleet is entirely wide-bodies and there are almost as many aircraft on order as there are in the fleet today.

Business overview

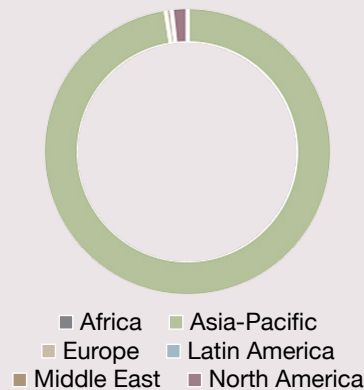
Global Ranking (seats)	14
Ownership	Publicly listed
Alliance Membership	Star Alliance
Domicile	Japan
Carrier Type (OAG category)	Mainline

Network

Over 80% of capacity in domestic network and rest predominantly in Asia-Pacific

Fastest growing region:
South Asia

Fastest growing country pair:
Japan – Australia



Network key metrics

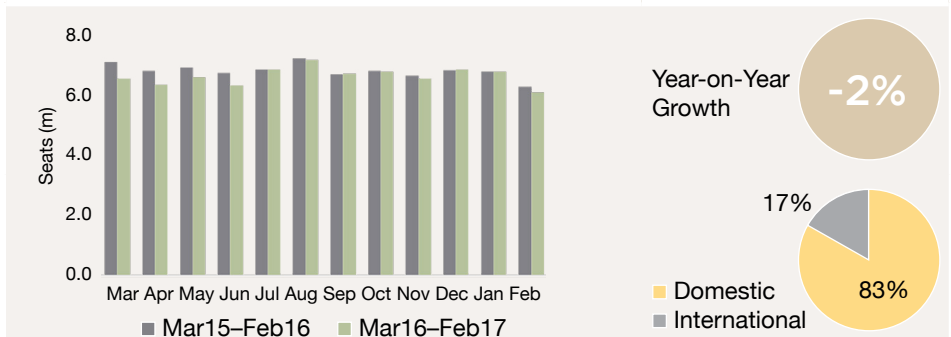
Top 3 Airports	Seats	Share of Airport Capacity	Routes
HND	22,421,011	42.90%	64
ITM	5,749,644	57.70%	20
CTS	4,886,545	34.60%	26

Top 3 Routes	Passenger Bookings	Average Bookings per day
FUK-HND	2,760,910	7,543
CTS-HND	2,375,661	6,491
HND-ITM	1,855,292	5,069

KPIs

Routes Operated	189	Passengers Carried	47,285,861
Seats	73,274,937	Average Bookings Load Factor	64%
Flights	357,964	OTP (last 12 months)	N/A
Average Seats/Aircraft	205	Average Stage Length	2,731 km
ASKs	105,683m	Average Flight Time (hh:mm)	02:15
Net New Routes	1	Countries Served	28

Capacity



Fleet and orders as of February 2017

206 aircraft in the fleet
102 aircraft on order – mix of narrow and wide-body aircraft

Type	In Use	On Order
Narrow-body	58	47
Wide-body	148	55

Average fleet age is 9.5 years.

OAG's take on...

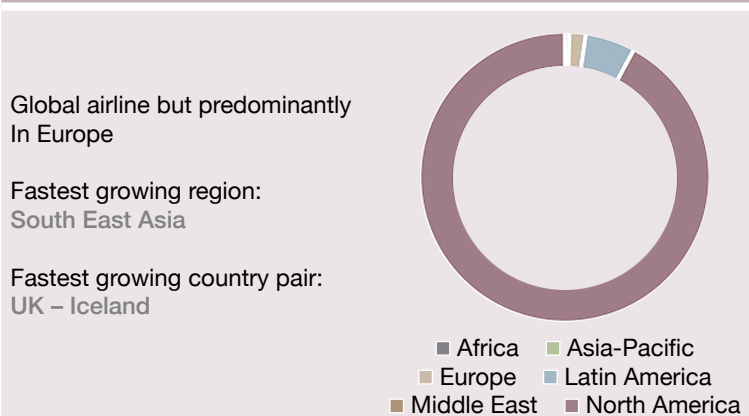
All Nippon Airways has seen a small contraction in capacity over the past year as the airline faces a strong competitive market in Japan. Despite not growing, the airline has a relatively large number of aircraft on order compared to the size of the current fleet.



Business overview

Global Ranking (seats)	15
Ownership	Publicly listed
Alliance Membership	oneworld (founder member)
Domicile	United Kingdom
Carrier Type (OAG category)	Mainline

Network



Network key metrics

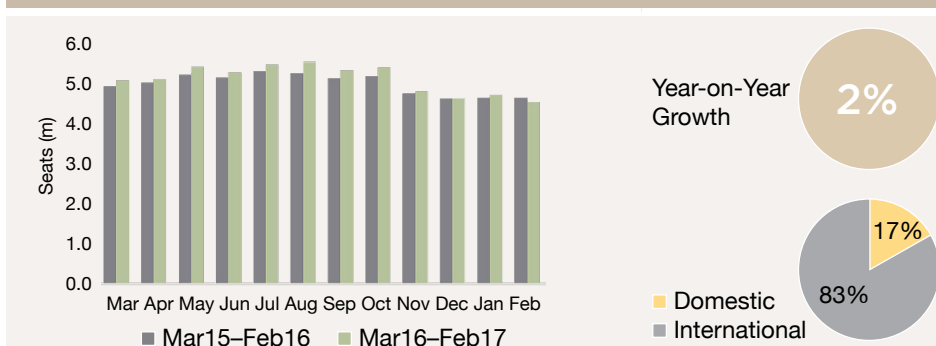
Top 3 Airports	Seats	Share of Airport Capacity	Routes
LHR	23,039,102	48.30%	147
LGW	3,704,077	14.70%	62
LCY	1,583,445	11.50%	33

Top 3 Routes	Passenger Bookings	Average Bookings per day
JFK-LHR	614,218	1,678
AMS-LHR	479,614	1,310
EDI-LHR	463,932	1,267

KPIs

Routes Operated	263	Passengers Carried	48,306,337
Seats	61,978,149	Average Bookings Load Factor	78%
Flights	368,050	OTP (last 12 months)	74.10%
Average Seats/Aircraft	168	Average Stage Length	2,955 km
ASKs	183,756m	Average Flight Time (hh:mm)	03:19
Net New Routes	12	Countries Served	84

Capacity



Fleet and orders as of February 2017

269 aircraft in the fleet
71 aircraft on order – mix of narrow and wide-body aircraft

Type	In Use	On Order
Narrow-body	131	35
Wide-body	138	36

Average fleet age is 12.9 years.
BA's fleet age is consistent with its European peers in the Top 20.

OAG's take on...

British Airways registered 2% growth in capacity over the past 12 months and increased its network by 12 routes, focusing on long-haul growth from Gatwick and Middle East routes from Heathrow.



Business overview

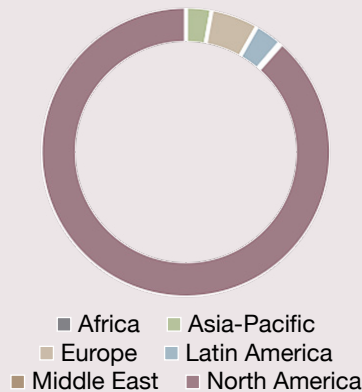
Global Ranking (seats)	16
Ownership	Publicly listed
Alliance Membership	Star Alliance (founder member)
Domicile	Canada
Carrier Type (OAG category)	Mainline

Network

Mostly North American network with 51% of capacity in domestic market

Fastest growing region:
South Asia

Fastest growing country pair:
Canada – India



Network key metrics

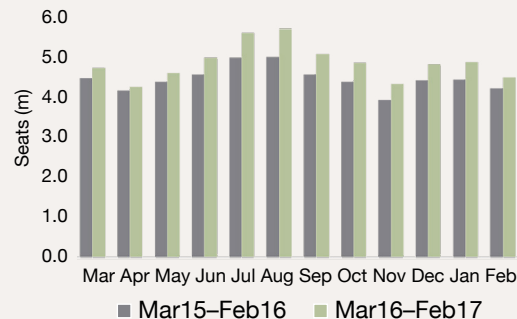
Top 3 Airports	Seats	Share of Airport Capacity	Routes
YYZ	15,615,637	57.40%	155
YVR	6,587,521	47.00%	56
YUL	5,706,549	53.50%	83

Top 3 Routes	Passenger Bookings	Average Bookings per day
YVR-YYZ	706,368	1,930
YUL-YYZ	602,612	1,646
YVR-YYC	518,471	1,417

KPIs

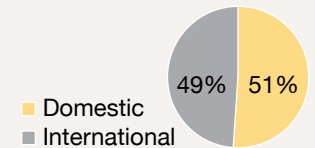
Routes Operated	340	Passengers Carried	45,345,669
Seats	58,144,941	Average Bookings Load Factor	80%
Flights	575,546	OTP (last 12 months)	74.30%
Average Seats/Aircraft	101	Average Stage Length	2,800 km
ASKs	151,667m	Average Flight Time (hh:mm)	02:26
Net New Routes	16	Countries Served	55

Capacity



Year-on-Year Growth

9%



Fleet and orders as of February 2017

167 aircraft in the fleet
119 aircraft on order – predominantly narrow-body aircraft

Type	In Use	On Order
Narrow-body	97	106
Wide-body	70	13

Average fleet age is 14.6 years. Air Canada's fleet is the second oldest in the Top 20.

OAG's take on...

Air Canada has a large number of aircraft on order, presumably in part to replace the ageing fleet. Growth in capacity is a healthy 9% and focused on international expansion in the coming year.

Business overview

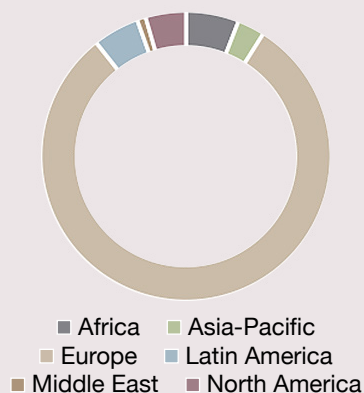
Global Ranking (seats)	17
Ownership	Mix of state & publicly-listed ownership
Alliance Membership	SkyTeam (founder member)
Domicile	France
Carrier Type (OAG category)	Mainline

Network

Mostly European network but with significant capacity to all other regions

Fastest growing region:
Caribbean

Fastest growing country pair:
Niger – Togo



Network key metrics

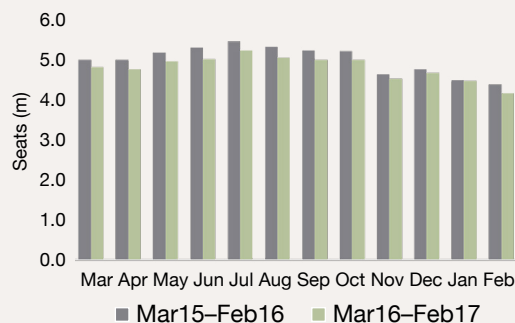
Top 3 Airports	Seats	Share of Airport Capacity	Routes
CDG	20,896,235	51.40%	162
ORY	6,859,760	34.40%	29
TLS	1,699,359	31.10%	3

Top 3 Routes	Passenger Bookings	Average Bookings per day
ORY-TLS	1,797,776	4,912
NCE-ORY	1,323,067	3,615
BOD-ORY	939,850	2,568

KPIs

Routes Operated	194	Passengers Carried	44,132,004
Seats	57,751,069	Average Bookings Load Factor	76%
Flights	332,399	OTP (last 12 months)	75.70%
Average Seats/Aircraft	174	Average Stage Length	3,388 km
ASKs	163,729m	Average Flight Time (hh:mm)	02:52
Net New Routes	-8	Countries Served	90

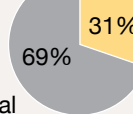
Capacity



Year-on-Year Growth

-4%

Domestic
International



Fleet and orders as of February 2017

223 aircraft in the fleet
52 aircraft on order – predominantly wide-body aircraft

Type	In Use	On Order
Narrow-body	118	3
Wide-body	105	49

Average fleet age is 12.4 years.
Air France average fleet age is in line with its European peers.

OAG's take on...

Air France has seen a contraction in its operations in the past year, with declines in both seat volumes and the number of routes operating. Aircraft on order are almost all wide-body aircraft, pointing to an increasing focus on long-haul operations.

Business overview

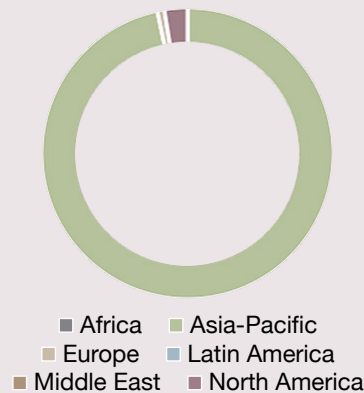
Global Ranking (seats)	18
Ownership	Publicly listed
Alliance Membership	oneworld
Domicile	Japan
Carrier Type (OAG category)	Mainline

Network

80% of capacity in Japanese network and the rest mainly in Asia-Pacific

Fastest growing region:
North East Asia

Fastest growing country pair:
Japan – Palau



Network key metrics

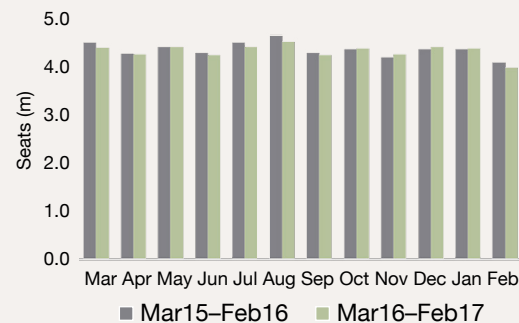
Top 3 Airports	Seats	Share of Airport Capacity	Routes
HND	17,798,876	33.90%	46
ITM	3,986,907	40.00%	25
CTS	3,488,571	24.70%	15

Top 3 Routes	Passenger Bookings	Average Bookings per day
FUK-HND	2,353,518	6,430
CTS-HND	2,067,518	5,649
HND-OKA	1,791,615	4,895

KPIs

Routes Operated	129	Passengers Carried	36,606,198
Seats	50,992,135	Average Bookings Load Factor	72%
Flights	278,778	OTP (last 12 months)	86.80%
Average Seats/Aircraft	183	Average Stage Length	2,393 km
ASKs	81,701m	Average Flight Time (hh:mm)	02:21
Net New Routes	6	Countries Served	22

Capacity



Year-on-Year Growth

-1%

20%

Domestic
International

80%

Fleet and orders as of February 2017

160 aircraft in the fleet
85 aircraft on order –
mix of narrow and wide-body
aircraft

Type	In Use	On Order
Narrow-body	50	41
Wide-body	110	44

Average fleet age is 9 years. Japan Airline has a smaller and younger fleet than its bigger competitor, All Nippon Airlines.

OAG's take on...

Haneda Airport is the heart of the Japan Airlines operation with 70% of capacity flying in or out of the airport. The airline has reduced capacity in the last year by 1% in the face of a competitive market.

Business overview

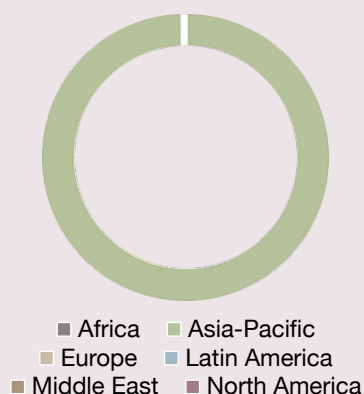
Global Ranking (seats)	19
Ownership	Private ownership
Alliance Membership	None
Domicile	Indonesia
Carrier Type (OAG category)	Low-cost

Network

Network mostly intra-Indonesia

Fastest growing region:
South East Asia

Fastest growing country pair:
Indonesia – China



Network key metrics

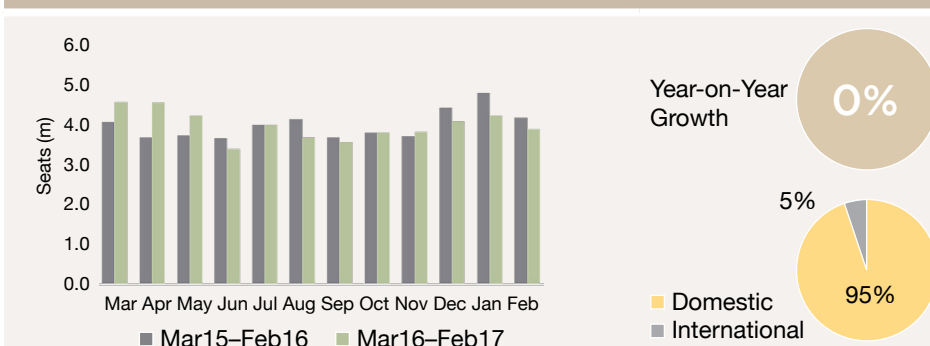
Top 3 Airports	Seats	Share of Airport Capacity	Routes
CGK	10,927,789	26.60%	33
SUB	5,305,912	40.50%	23
UPG	4,106,486	42.30%	25

Top 3 Routes	Passenger Bookings	Average Bookings per day
CGK-DPS	1,232,062	3,366
CGK-UPG	1,144,339	3,127
SUB-UPG	1,106,609	3,024

KPIs

Routes Operated	106	Passengers Carried	39,237,806
Seats	48,557,485	Average Bookings Load Factor	79%
Flights	263,433	OTP (last 12 months)	N/A
Average Seats/Aircraft	184	Average Stage Length	1,248 km
ASKs	43,704m	Average Flight Time (hh:mm)	01:35
Net New Routes	3	Countries Served	7

Capacity



Fleet and orders as of February 2017

113 aircraft in the fleet
443 aircraft on order –
predominantly narrow-body aircraft

Type	In Use	On Order
Narrow-body	108	440
Wide-body	5	3

Average fleet age is 5.8 years.

Lion Air is the only airline to have an order book far larger than its current fleet. It also has the most narrow-body aircraft on order of the Top 20 with a young fleet.

OAG's take on...

Although capacity is currently flat, Lion Air has the largest number of aircraft on order of any airline in the Top 20. Current operations are mostly domestic with the airline operating to just six other countries in the region.

Business overview

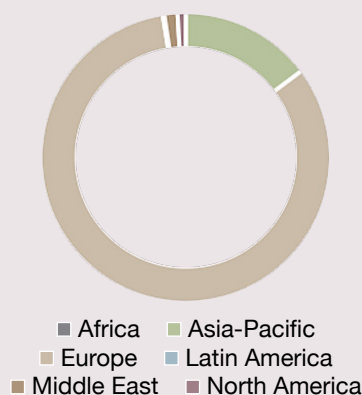
Global Ranking (seats)	20
Ownership	Mix of state & publicly-listed ownership
Alliance Membership	SkyTeam
Domicile	Russian Federation
Carrier Type (OAG category)	Mainline

Network

49% of capacity in Russian domestic market, with remainder mostly rest of Europe and Asia-Pacific

Fastest growing region:
South Asia

Fastest growing country pair:
Russia – Colombia



Network key metrics

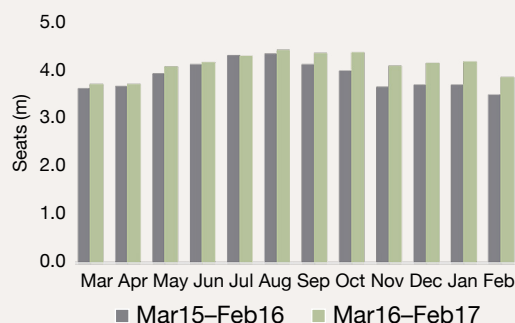
Top 3 Airports	Seats	Share of Airport Capacity	Routes
SVO	18,508,703	90.40%	133
LED	3,646,286	48.00%	52
VKO	1,674,363	20.40%	17

Top 3 Routes	Passenger Bookings	Average Bookings per day
LED-SVO	743,483	2,031
SIP-SVO	506,433	1,384
AER-SVO	419,218	1,145

KPIs

Routes Operated	252	Passengers Carried	36,652,477
Seats	47,060,867	Average Bookings Load Factor	81%
Flights	296,644	OTP (last 12 months)	N/A
Average Seats/Aircraft	159	Average Stage Length	2,427 km
ASKs	113,706m	Average Flight Time (hh:mm)	03:09
Net New Routes	3	Countries Served	53

Capacity



Year-on-Year Growth

6%

Domestic
International

51% 49%

Fleet and orders as of February 2017

185 aircraft in the fleet
79 aircraft on order – mix of narrow and wide-body aircraft

Type	In Use	On Order
Narrow-body	148	42
Wide-body	37	37

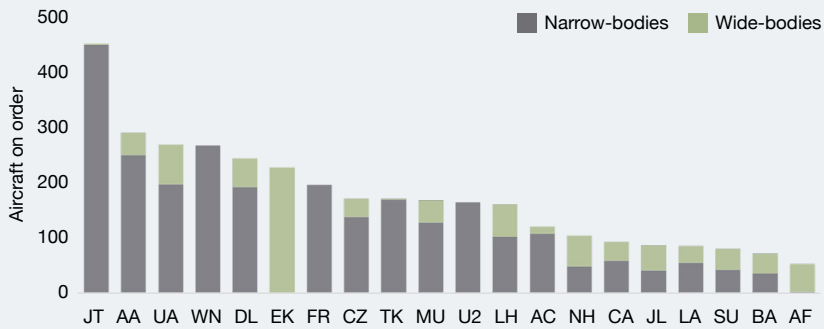
Average fleet age is 4.3 years. Aeroflot has the youngest fleet of the Top 20.

OAG's take on...

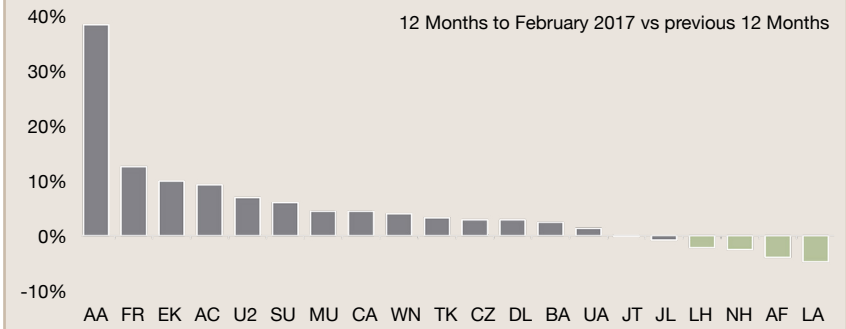
Aeroflot has seen healthy growth of 6% in capacity over the past year and benefits from the youngest fleet of aircraft among this group of Top 20 airlines.

Top 20 Airline comparison

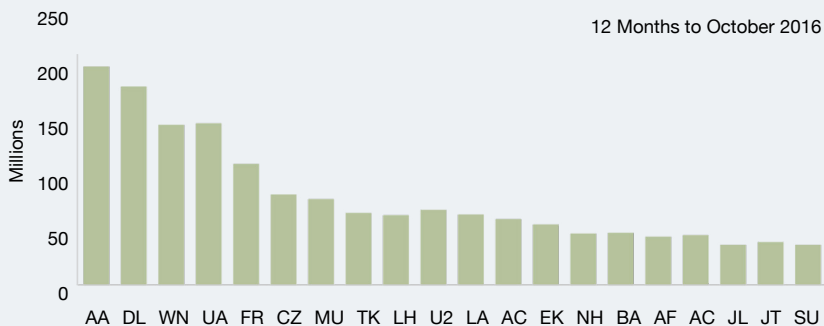
Fleet Orders



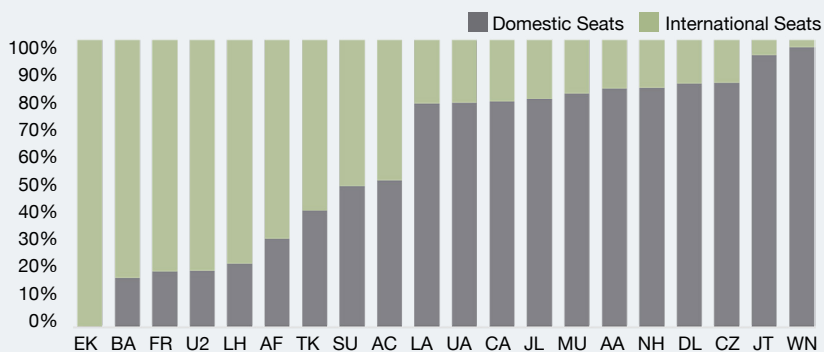
Seat Growth



Passenger Bookings



Domestic vs International



- **Lion Air** has largest number of aircraft on order (433) – almost all narrow-body.
- **Emirates** order book is entirely wide-body aircraft.
- **Top 4 airlines** for passenger bookings are all US based.
- **European airline networks** have largest share of international capacity.
- **American Airlines** capacity has grown with US Airways merger.
- **Lufthansa, All Nippon, Air France** and **LATAM** have been reducing overall capacity.

Code	Airline
AA	American Airlines
AC	Air Canada
AF	Air France
BA	British Airways
CA	Air China
CZ	China Southern Airlines
DL	Delta Air Lines
EK	Emirates
FR	Ryanair
JL	Japan Airlines
JT	Lion Air
LA	LATAM Airlines Group
LH	Lufthansa German Airlines
MU	China Eastern Airlines
NH	All Nippon Airways
SU	Aeroflot Russian Airlines
TK	Turkish Airlines
U2	easyJet
UA	United Airlines
WN	Southwest Airlines



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