SHIFTING SKIES: HOW GLOBAL CAPACITY IS TAKING SHAPE FOR 2026

WEDNESDAY 3 DECEMBER

WEBINAR

SPEAKERS

John Grant

Chief Analyst, OAG

With a wealth of experience across the global aviation industry, John provides expert commentary on market developments for OAG, making connections between what the data is telling us and the trends and events occurring in the sector.

Jon Howey

Senior Director, CALC

Jon Howey has over 17 years of experience in the aviation finance sector with the vast majority of that spent in portfolio/credit risk related roles within leading aircraft lessors. Since March 2020 he has been Head of Aviation Risk for CALC Group.

Sanja Ples

CEO, CH Aviation

Sanja Ples is an experienced aviation expert with more than15 years of expertise. She has a strong foundation in operations, sales, and marketing, together with a strong passion for aviation.
She is currently the CEO and co-owner of ch-aviation, where her main goal is to make sure the aviation community receives reliable news and statistics on the airline business.

Deirdre Fulton

Partner, MIDAS Aviation

Deirdre is a partner in an aviation consultancy providing meaningful insight and analysis to clients around the world. She works closely with OAG on their data analysis and publications.

WEBINAR

TODAY’S DISCUSSION

In this webinar we’ll be discussing as we reflect on aviation’s key moments of 2025 and share expert insights on the trends that may shape 2026.

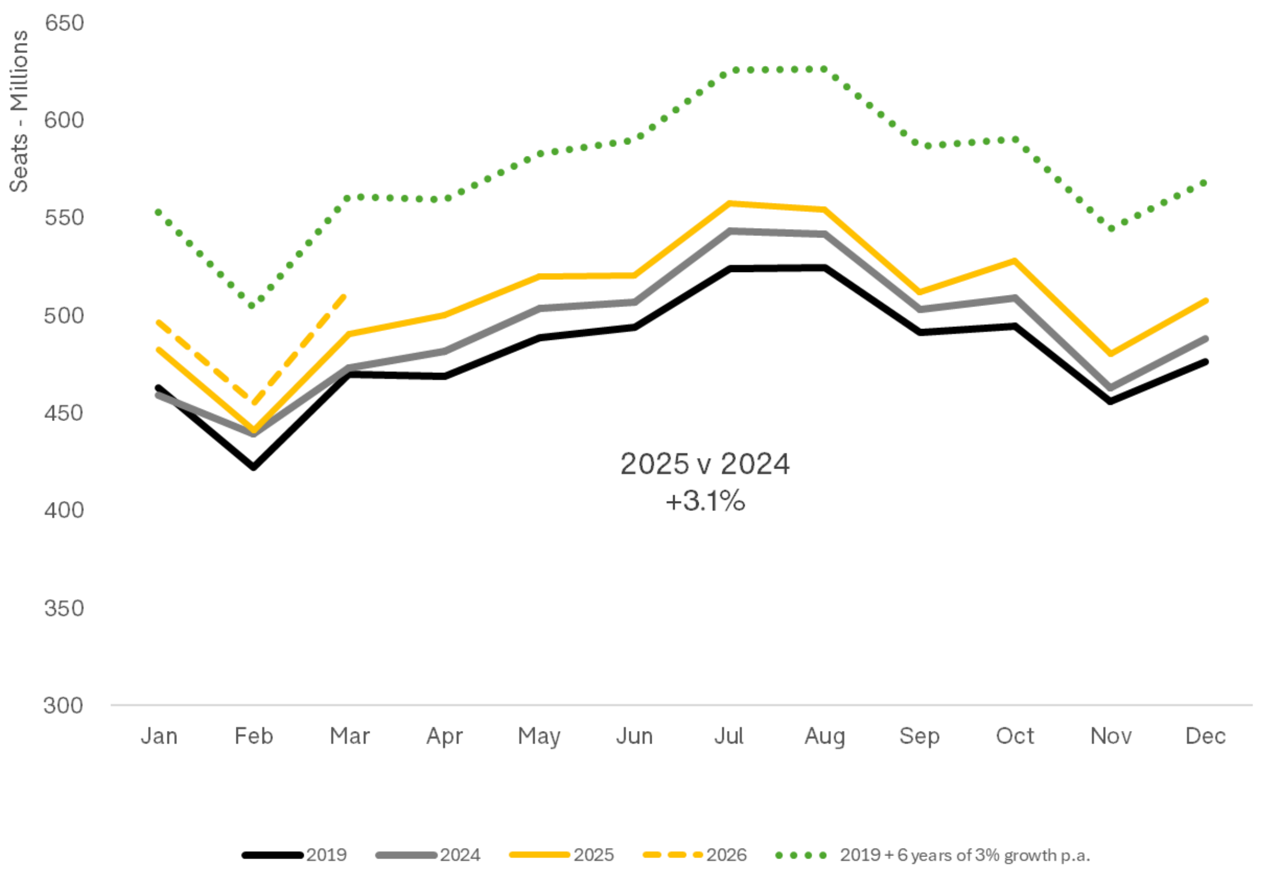
We’ll be discussing the following:

- Global capacity trends and where growth is taking place right now
- New developments to come in 2026 in the airline community
- The airlines to watch in the year ahead

We’ll be taking questions as we go. Please use the chat function to ask your questions

WEBINAR

Global capacity growth remains steady at 3.1%

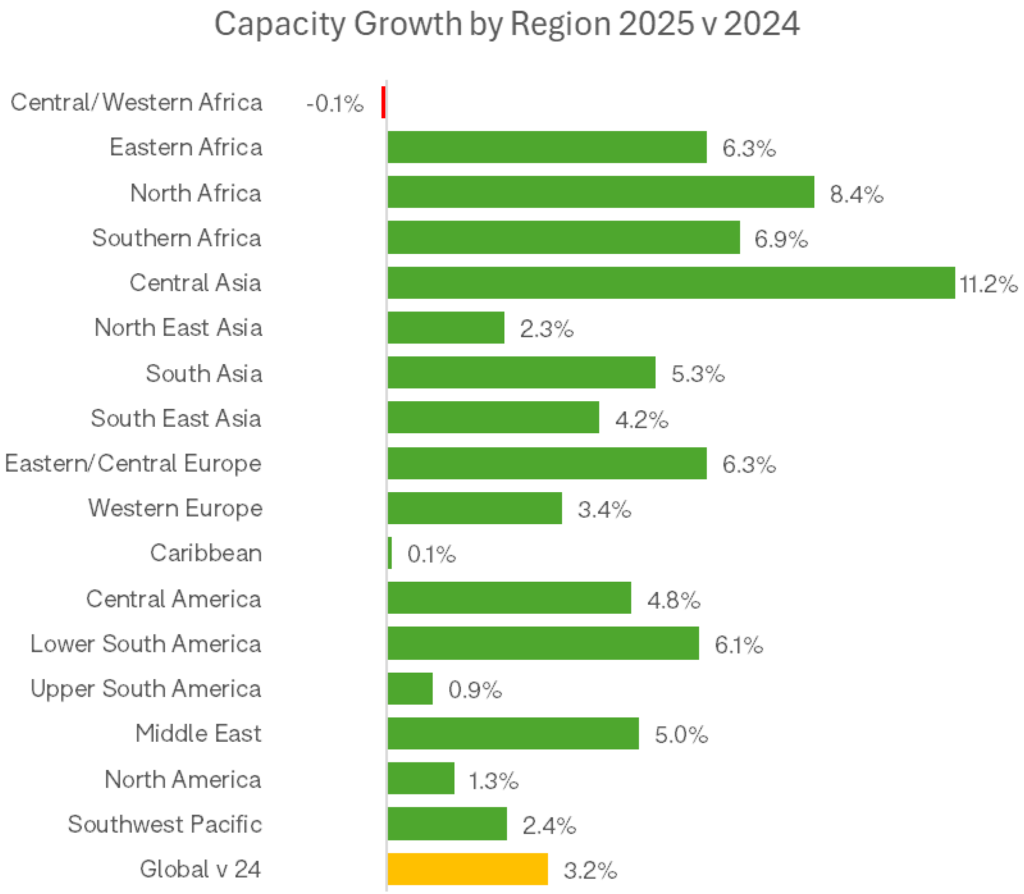


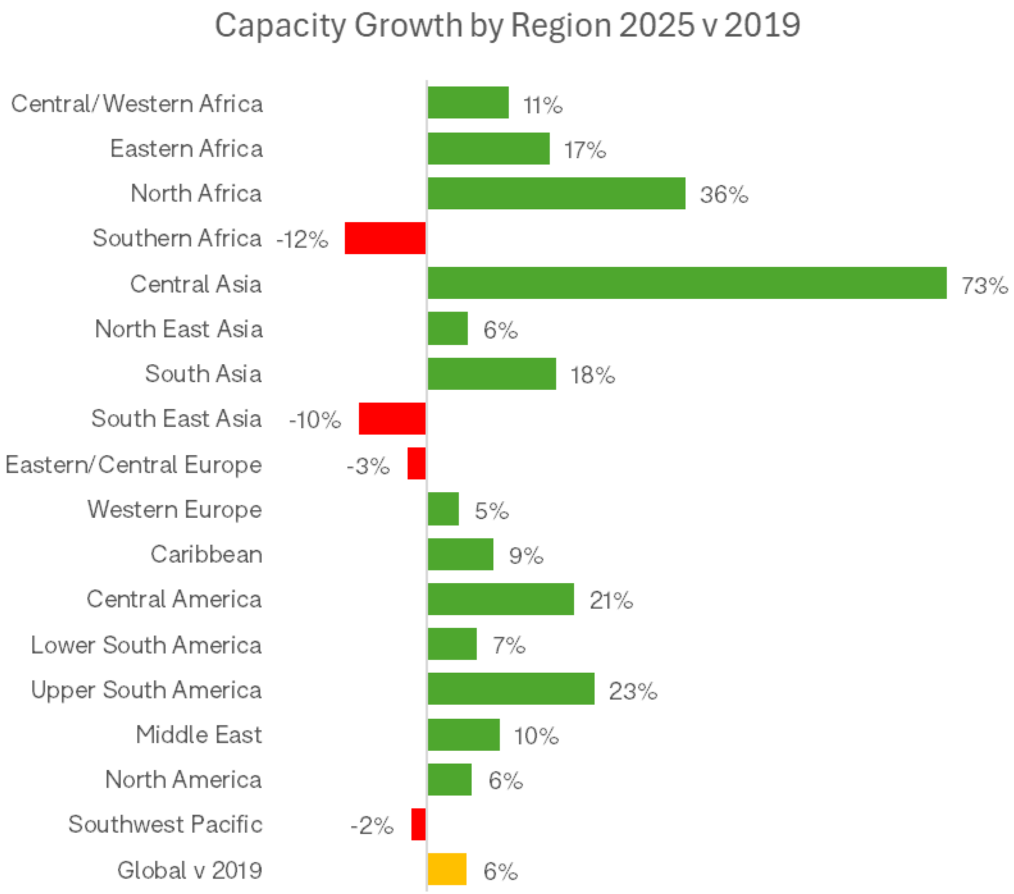
Capacity growth for the year to date remains steady at 3.1% ahead of last year.

Q1 of 2026 is currently 3.6% ahead of Q1 2025

WEBINAR

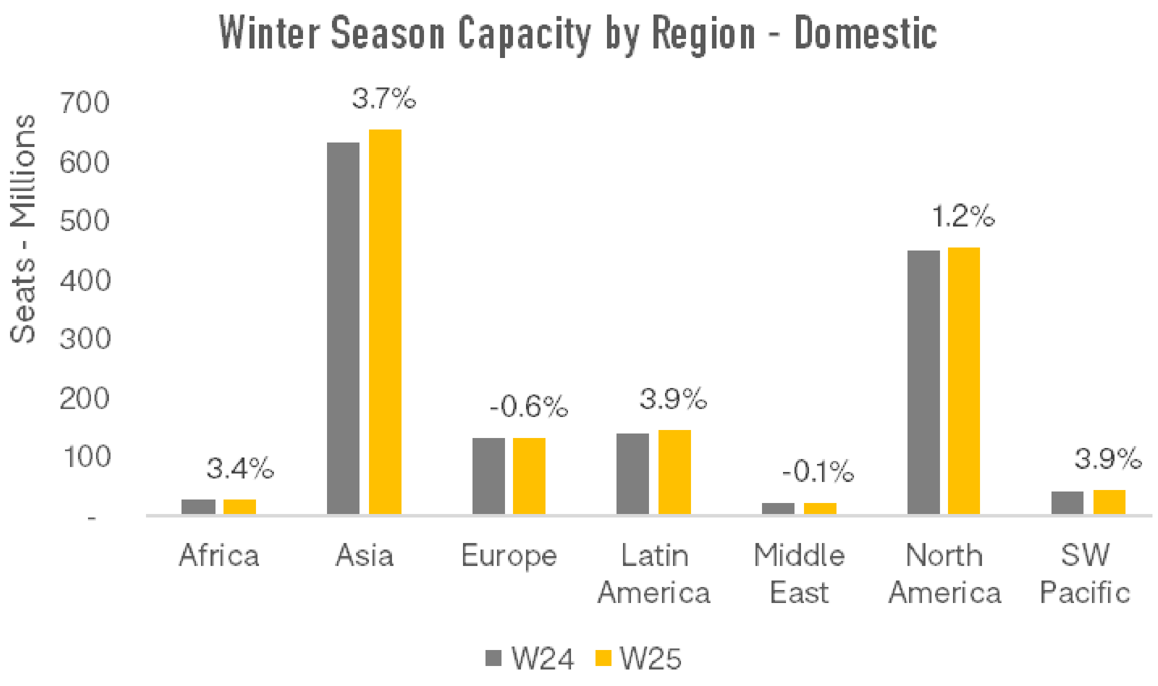
Growth hotspots in 2025

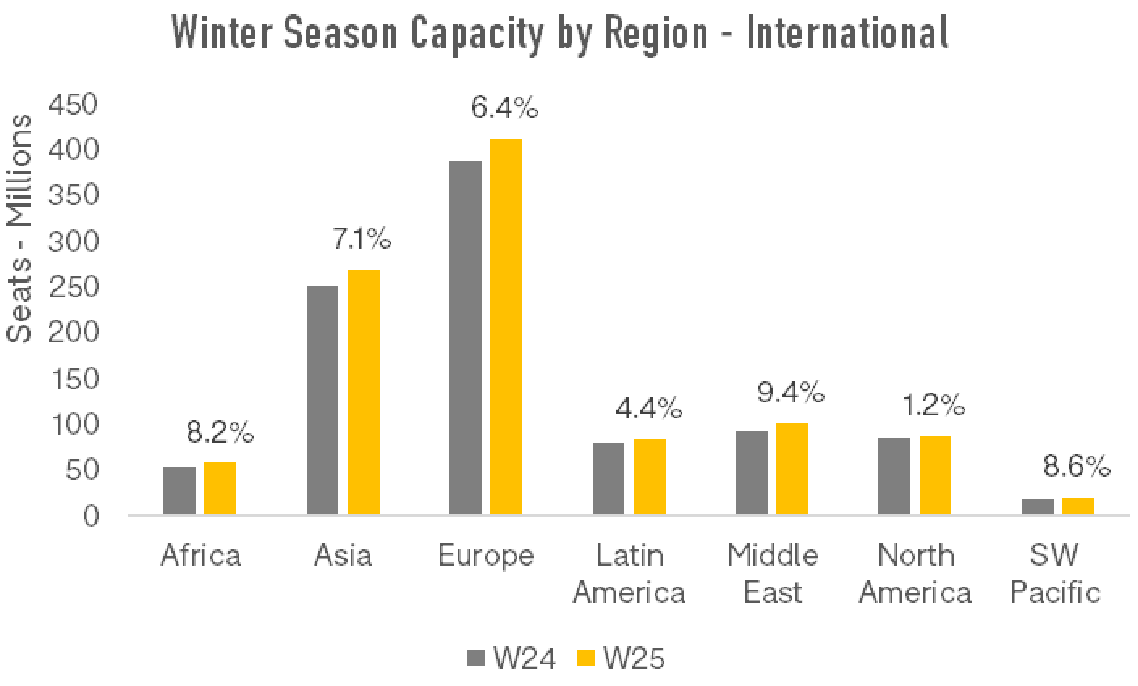




WEBINAR

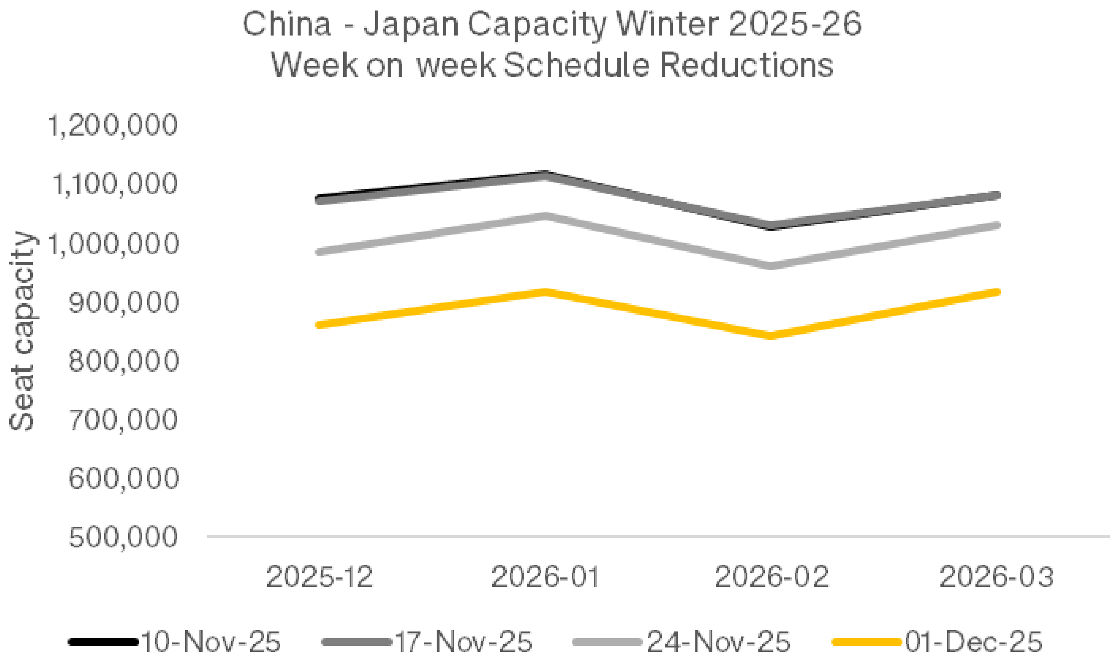
What does the winter season hold?

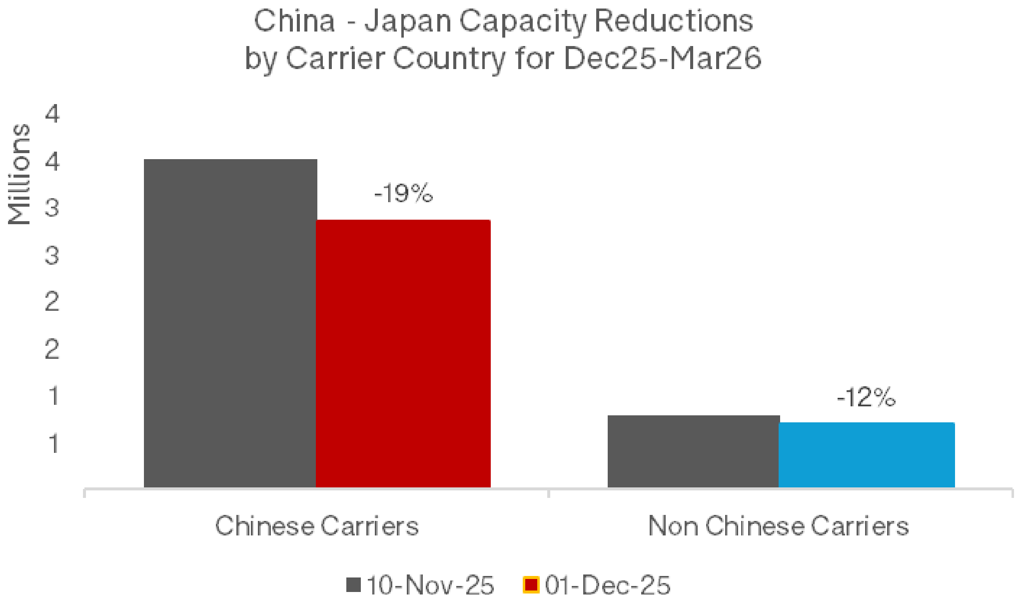




WEBINAR

Some turbulence emerging in North-East Asia





On 14 November, China issued a travel advisory, urging its citizens not to travel to Japan following a diplomatic dispute between the two countries. This was followed by a further warning to Chinese citizens from the Chinese Embassy in Tokyo, raising security concerns about travel in Japan.

Capacity between the two countries has seen a significant fall in the last four weeks for the rest of the winter season (December – the end of March) with seats down by 18% compared to the position before the announcements.   Before this, 82% of capacity was operated by Chinese carriers, and they have reduced capacity by 19% for the rest of the season. This may reduce further in the coming weeks.

WEBINAR

Europe's LCC landscape dominated by Ryanair

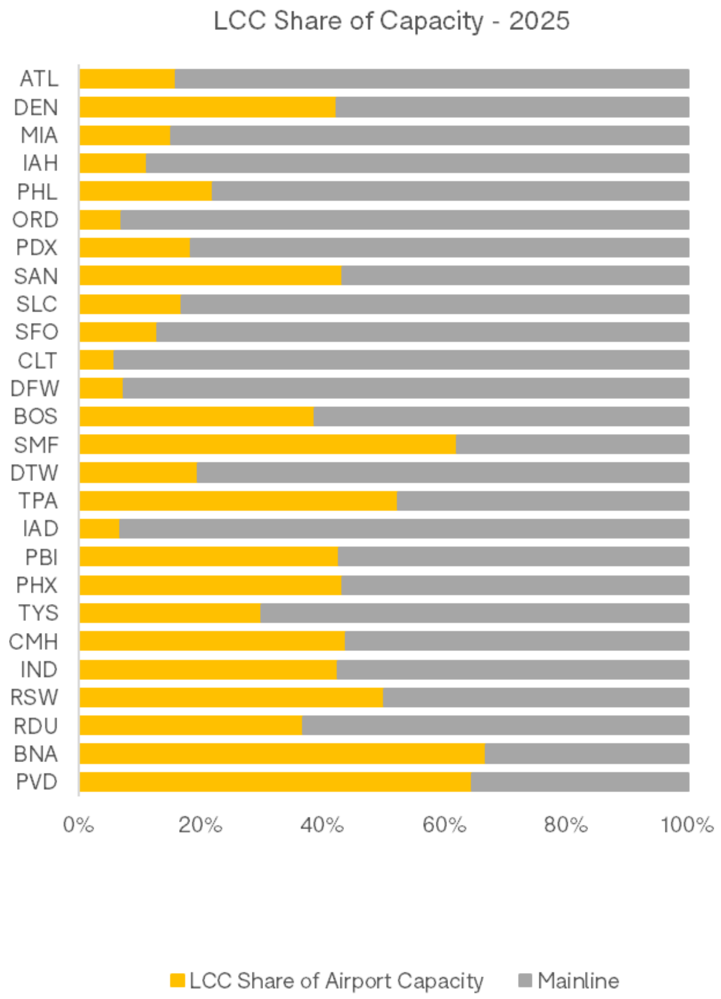
OAG

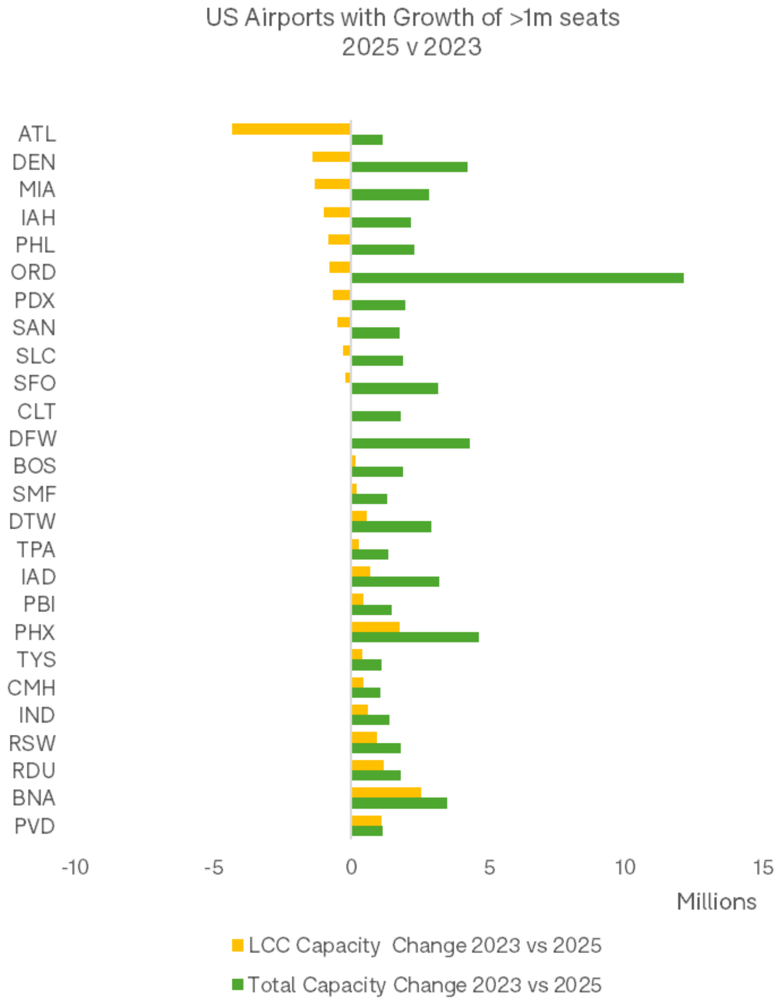
- In 5 of the Top 10 LCC markets in Europe, Ryanair have the largest share.
- This is highest in Italy where they operate 57% of capacity.
- Only Norway has a more dominant carrier, Norwegian, who operate 85% of capacity.
- In Poland Ryanair also operate over 50% of capacity.

Rank	Country	Airline (Group)	Market Share (%)	Total LCC Market Capacity
1	Spain	Ryanair	37%	104,934,531
2	United Kingdom	Easyjet	38%	94,095,574
3	Italy	Ryanair	57%	81,675,862
4	Turkiye	Pegasus Airlines	66%	49,778,150
5	France	Easyjet	29%	47,963,557
6	Germany	Eurowings	35%	43,314,696
7	Poland	Ryanair	53%	20,338,803
8	Portugal	Ryanair	42%	19,278,006
9	Greece	Ryanair	31%	14,730,455
10	Norway	Norwegian	85%	14,298,309

WEBINAR

Meanwhile in the US, LCC access to major hubs is limited





WEBINAR

High points of 2025 in Aviation

OAG

RECORD AIRCRAFT ORDERS MADE

- Dubai Air Show

NEW AIRCRAFT DEVELOPMENTS

- The long awaited A321-XLR hit the skies this year

NEW MARKETS

- Indigo arrived in Europe this year – starting new routes to Manchester, Amsterdam and Copenhagen and announced London Heathrow and Athens from early 2026. They also plan to serve four cities in Central Asia and Siem Reap in 2026.

NEW AIRLINES

- Riyadh Air soft launched in late October

WEBINAR

Key Industry Challenges in 2025

SUPPLY CHAIN DELAYS

Supply chain delays have pushed up airline fleet ages as they hang onto older aircraft and incur more maintenance. IATA estimated in October 2025 this could cost the industry $11bn in 2025

LABOUR

Labour shortages continue – pilots, maintenance technicians, cabin crew – all in high demand

GEO-POLITICS

Ongoing disputes have disrupted growth in 2025, and continue to cause an impact –
Russia/Ukraine
Iran/Israel
India/Pakistan
Thailand/Laos
China/Japan

INFRA-STRUCTURE

ATC capacity became a real concern in 2026 as is the need to match airport infrastructure growth to the pace of growth

WEBINAR

Bankruptcies and Market exits

OAG

PLAY

Silver AIRWAYS

sunwing

BRA

Airlines which disappeared in 2025

blueislands
A WELCOME DIFFERENCE

SMARTLYNX

Eastern airways

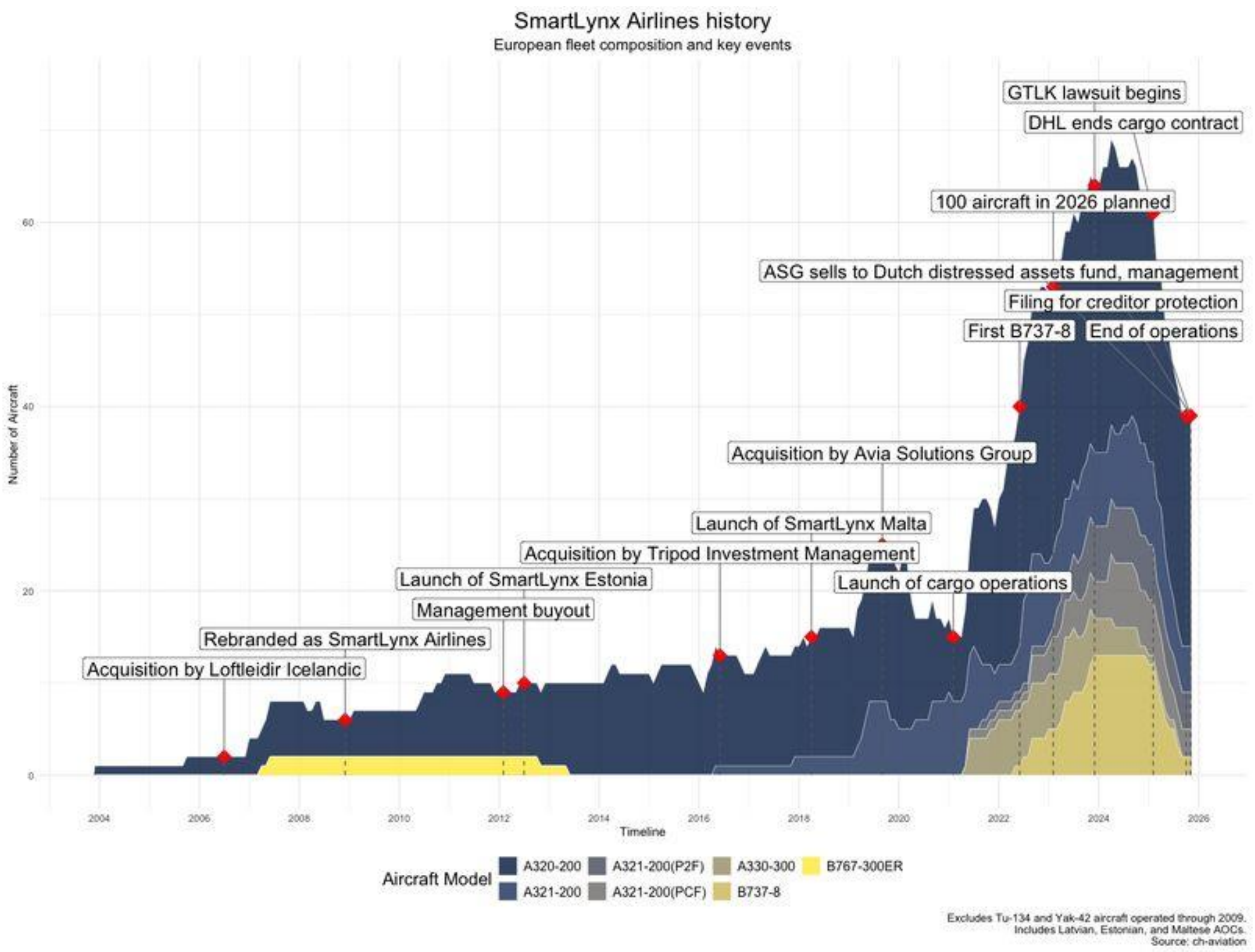
Jetstar

spirit

WEBINAR

The demise of SmartLynx

- The ACMI carrier SmartLynx collapsed last week after 33 years of operating
- The carrier had expanded considerably since 2022 however questions arise as to whether it made the right strategic choices about which direction to pursue in the ACMI market



WEBINAR

What will 2026 bring?

- Should we be concerned about airline collapses so early in the winter season?
- Will 2026 be the year that aircraft deliveries get on track and supply chain issues begin to settle down?
- Might we see peace in Ukraine in 2026? Who will be well placed to help the Ukraine air market rebuild and return?
- What might be the impact of the current China-Japan dispute? Having become Japan's largest inbound market, where might we see Chinese outbound travellers go in 2026?
- How will the US domestic market changes play out? What will we see from Spirit in 2026 and what space can Breeze carve out for growth?

WEBINAR

STAY INFORMED

SIGN UP TO OUR BLOG

https://www.oag.com/insights

Contact us via: contactus@oag.com or visit www.oag.com

WEBINAR