APRIL 2021

OAG FREQUENCY & CAPACITY STATISTICS

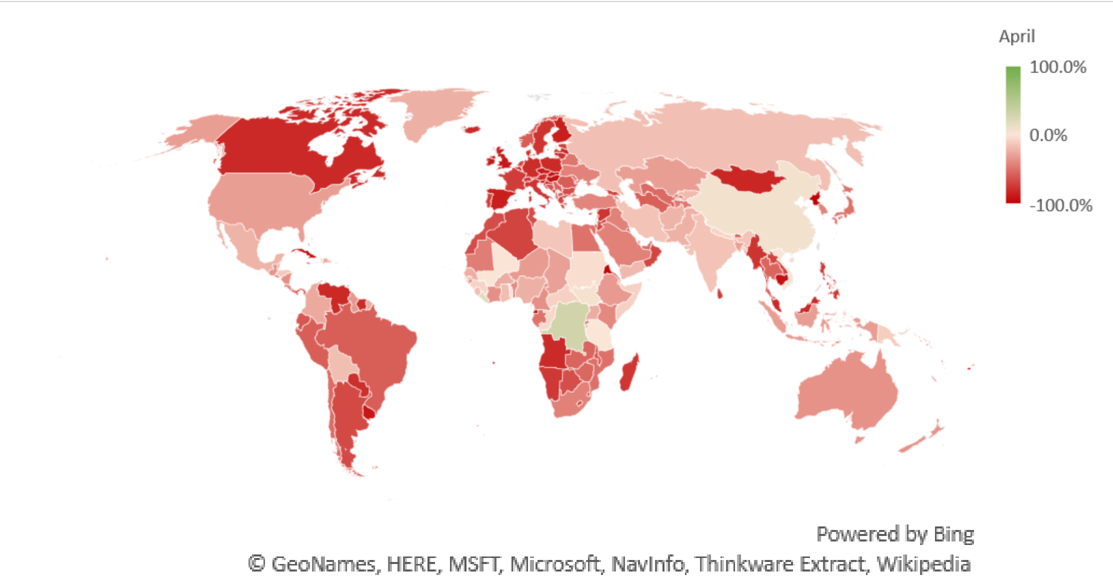
MAKE SMARTER MOVES

SEATS BY REGION

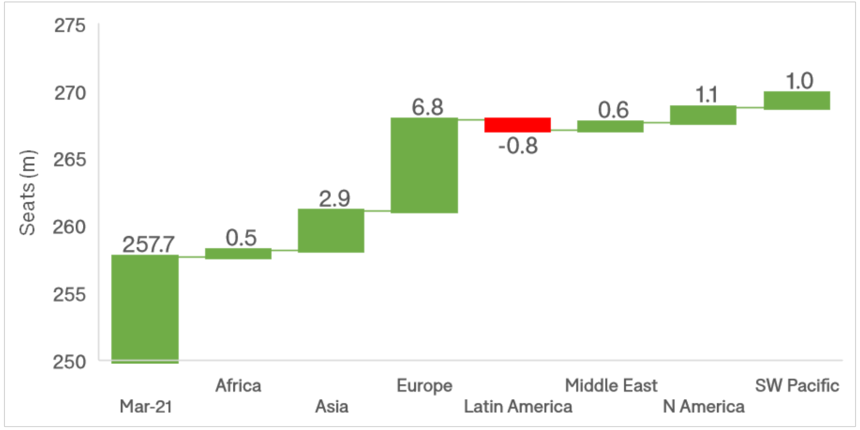
Region	Seats in Apr-21	Change v Apr-19	% Change	Change v Mar-21	% Change
Africa : Central/Western Africa	1,773,219	-27.1%		6.6%	
Africa : Eastern Africa	1,817,105	-39.0%		-6.0%	
Africa : North Africa	1,985,836	-57.8%		13.7%	
Africa : Southern Africa	1,721,141	-48.9%		17.2%	
Asia : Central Asia	943,556	-39.4%		8.7%	
Asia : North East Asia	87,943,659	-13.9%		2.1%	
Asia : South Asia	16,202,472	-17.5%		-0.5%	
Asia : South East Asia	20,879,055	-50.8%		5.3%	
Europe : Eastern/Central Europe	9,226,207	-48.0%		20.8%	
Europe : Western Europe	24,586,451	-75.3%		27.0%	
Latin America : Caribbean	2,280,111	-44.7%		-3.1%	
Latin America : Central America	7,405,263	-26.4%		7.2%	
Latin America : Lower South America	5,944,100	-59.8%		-21.0%	
Latin America : Upper South America	4,171,428	-40.7%		9.4%	
Middle East	8,708,107	-53.2%		7.1%	
North America	66,604,669	-35.3%		1.7%	
Southwest Pacific	7,563,370	-37.8%		15.5%	
Global	269,755,749	-42.1%		4.7%	

Source: Schedules Analyser

Seat Capacity April 2021 v April 2019



Seats (m) added/removed in each region in the last month vs previous month



KEY POINTS

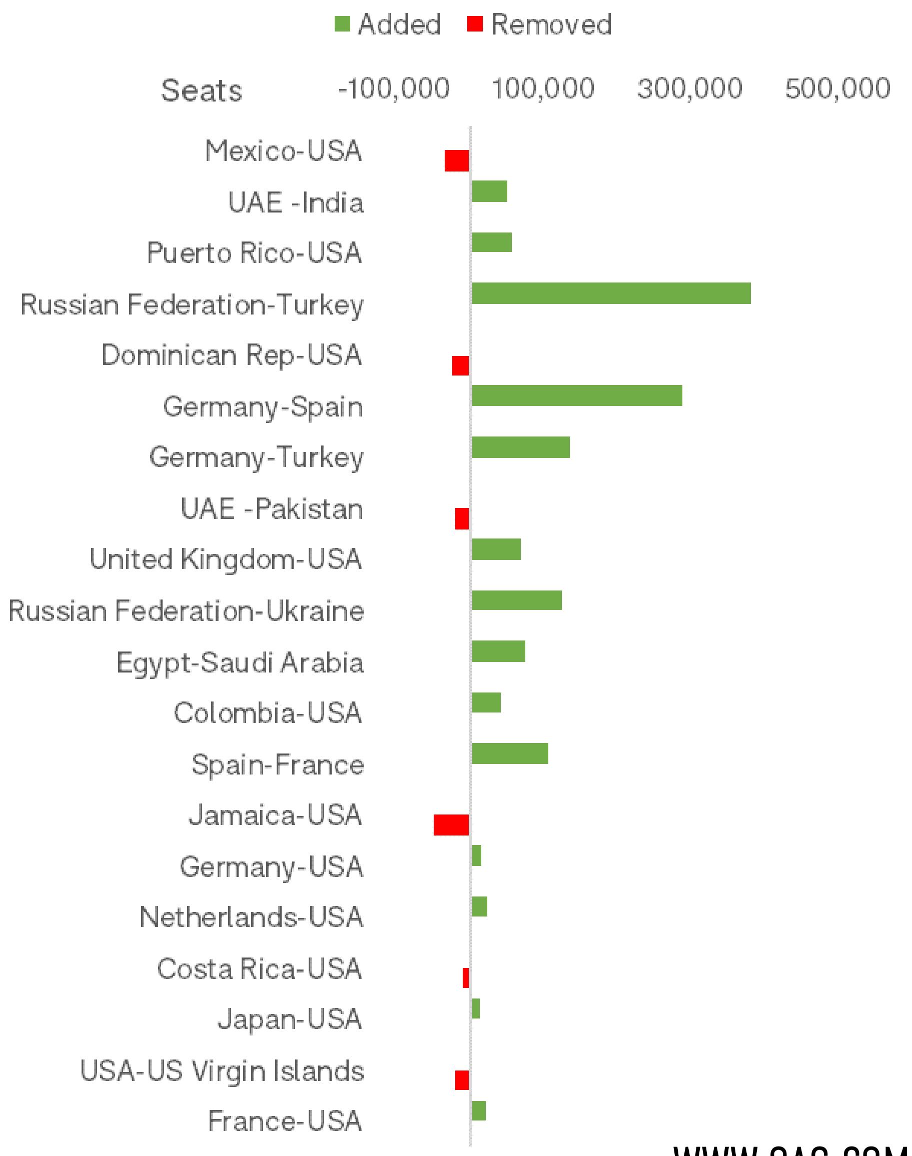
- NOTE: For the remainder of this year we will compare data for the current month to the same month in 2019, before the pandemic began, as well as to the previous month in 2021.
- Globally, seat capacity is 42% below April 2019 levels, at 269.7m seats this month. Compared to last month, capacity has increased by nearly 5% with growth across most regions. The notable exception is Lower South America where capacity has fallen back by 21% , or by 1.5m seats, compared to March 2021.
- By comparison to April 2019, Western Europe trails other regions, with capacity sitting at just 25% of 2019 levels. North East Asia (powered by China's domestic market) sits at just 14% below April 2019.
- Many other regions sit around the halfway mark, with North America and the Southwest Pacific regions outperforming that at -35% and -38% below 2019 levels as these markets start to tentatively reopen. Carriers have increased seats by 16% in the last month in the Southwest Pacific with the news that a trans-Tasman bubble between Australia and New Zealand is finally getting off the ground.

TOP TWENTY COUNTRY PAIRS

Country Pairs	Country Pairs	Seats in Apr-21	Change v Apr-19	% Change	Change v Mar-21	% Change
MX-US	Mexico-USA	2,941,124	-9.0%		-1.2%	
AE-IN	UAE -India	1,239,864	-25.7%		4.2%	
PR-US	Puerto Rico-USA	916,648	15.3%		6.4%	
RU-TR	Russian Federation-Turkey	851,327	36.5%		81.7%	
DO-US	Dominican Rep-USA	826,047	13.7%		-2.8%	
DE-ES	Germany-Spain	740,317	-74.4%		64.1%	
DE-TR	Germany-Turkey	538,370	-62.5%		33.5%	
AE-PK	UAE -Pakistan	444,973	-23.3%		-4.5%	
GB-US	United Kingdom-USA	372,361	-83.9%		22.4%	
RU-UA	Russian Federation-Ukraine	371,671	15.0%		50.7%	
EG-SA	Egypt-Saudi Arabia	364,956	-57.0%		25.7%	
CO-US	Colombia-USA	338,134	-15.1%		14.2%	
ES-FR	Spain-France	332,078	-77.4%		47.2%	
JM-US	Jamaica-USA	302,288	-31.2%		-14.1%	
DE-US	Germany-USA	287,050	-72.9%		5.0%	
NL-US	Netherlands-USA	274,222	-57.6%		8.8%	
CR-US	Costa Rica-USA	262,378	-18.4%		-4.0%	
JP-US	Japan-USA	257,185	-73.8%		5.4%	
US-VI	USA-US Virgin Islands	253,274	108.1%		-7.3%	
FR-US	France-USA	251,757	-70.8%		9.4%	

Source: Schedules Analyser

Seat Capacity April v March 2021



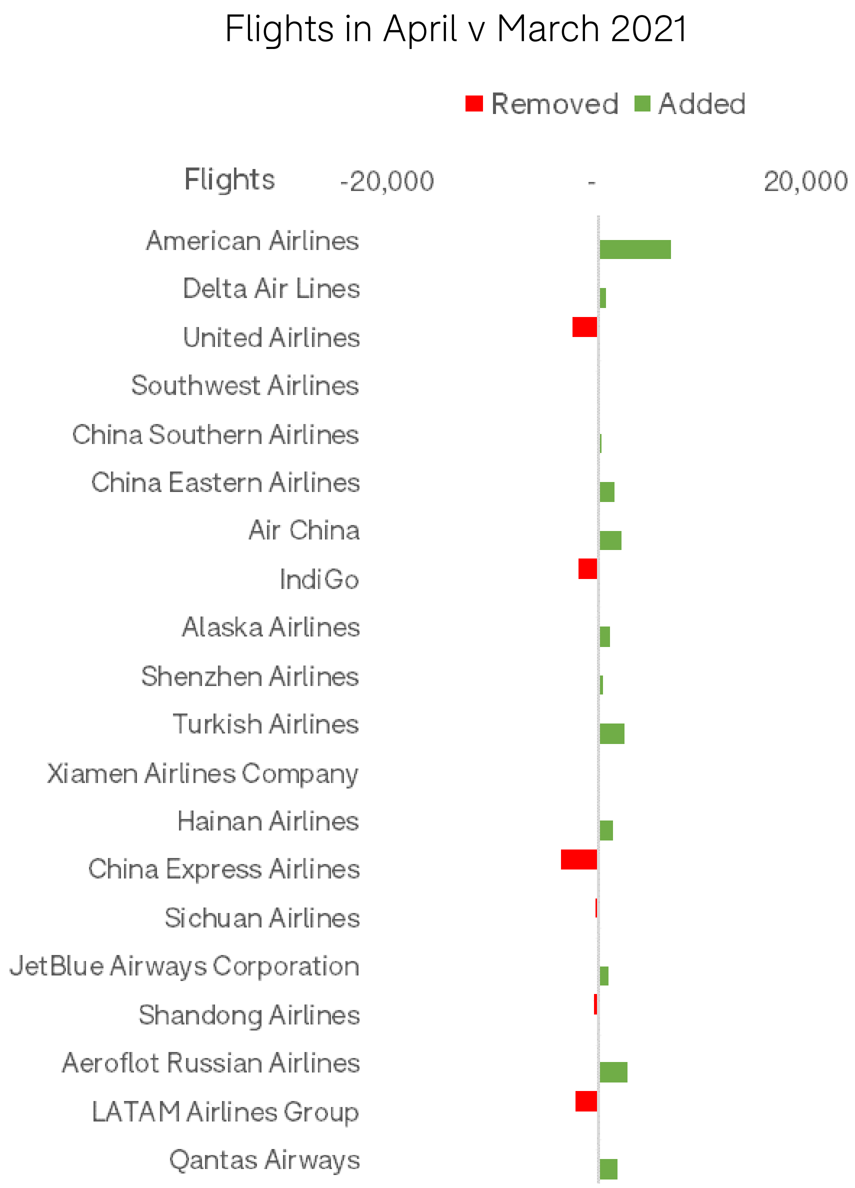
KEY POINTS

- The Russian Federation-Turkey is the country pair seeing the highest rate of growth this month when compared to last month, with carriers increasing capacity by 82%, equivalent to nearly 0.4m extra seats. This may be short lived however, with Russia announcing this week that air service between the two countries will be restricted from mid April to June 1st due to high numbers of COVID cases in Turkey.
- There is also strong capacity growth taking place between Germany and Spain, and Germany and Turkey as carriers anticipate these country markets re-opening for travel.
- There is also strong capacity growth for Spain-France which may be subject to change given France has gone back into lockdown again for a month.
- The Top 20 markets today are quite different from what they were 2 years ago with large markets such as Spain-UK, Canada-US and Japan-South Korea missing from todays list, and what were smaller markets previously now appearing.
- Five of the Top 20 markets have reached capacity levels beyond those recorded in April 2019, with three of these key US outbound leisure markets, reflecting the appetite for travel.

TOP TWENTY AIRLINES

Airlines	Flights in Apr-21	Change v Apr-19	% Change	Change v Mar-21	% Change
American Airlines	140,377	-26.7%		5.2%	
Delta Air Lines	113,105	-30.5%		0.7%	
United Airlines	86,856	-41.8%		-2.7%	
Southwest Airlines	82,123	-30.7%		-0.2%	
China Southern Airlines	65,356	2.7%		0.5%	
China Eastern Airlines	64,811	2.1%		2.4%	
Air China	42,148	4.9%		5.8%	
IndiGo	36,834	-10.7%		-4.8%	
Alaska Airlines	30,900	-18.4%		4.1%	
Shenzhen Airlines	22,659	3.1%		2.4%	
Turkish Airlines	21,476	-42.0%		13.2%	
Xiamen Airlines Company	20,490	5.8%		0.2%	
Hainan Airlines	20,481	-11.3%		7.4%	
China Express Airlines	20,198	114.3%		-15.0%	
Sichuan Airlines	19,645	7.4%		-1.4%	
JetBlue Airways Corporation	19,370	-38.5%		5.8%	
Shandong Airlines	17,817	6.2%		-2.0%	
Aeroflot Russian Airlines	17,398	-40.5%		20.0%	
LATAM Airlines Group	16,600	-54.7%		-11.9%	
Qantas Airways	16,596	-24.7%		12.8%	

Source: Schedules Analyser



KEY POINTS

- Aeroflot and Turkish Airlines had planned to add the most capacity, as a percentage of last months' capacity, in April 2021, at 20% and 13%, respectively. However, rising COVID cases in Turkey mean that Russia has announced restrictions on travel to Turkey until June 1st which may impact capacity for these countries over the coming months.
- China Express Airlines, continues its growth trajectory with more than twice the capacity planned in April 2021 compared to April 2019. However, month-by-month capacity adjustments are inevitable with growth like this and in April capacity will be 15% less than in March 2021.
- The Top 4 airlines in the world continue to be based in the US and of these American Airlines is furthest down the road to capacity recovery with seats in April 2021 just 27% below where they were 2 years ago, and 5% more seats operating than last month.

TOP TWENTY AIRPORTS

Airports	Seats in Apr-21	Change v Apr-19	% Change	Change v Mar-21	% Change
Atlanta	3,909,208	-25.6%		-0.4%	
Guangzhou	3,620,661	0.6%		2.4%	
Chengdu	2,966,192	14.3%		-1.9%	
Beijing	2,943,173	-40.3%		4.1%	
Dallas/Fort Worth	2,935,948	-14.3%		-3.3%	
Denver	2,794,384	-10.6%		-1.0%	
Shenzhen	2,785,304	6.1%		1.6%	
Delhi	2,704,951	-11.6%		6.2%	
Chongqing	2,609,502	26.6%		-3.0%	
Shanghai Pudong	2,535,816	-33.9%		1.3%	
Xi'an Xianyang Apt	2,529,249	9.3%		6.9%	
Kunming	2,407,762	2.8%		-3.6%	
Jakarta	2,395,318	-22.9%		-9.0%	
Shanghai Hongqiao	2,388,570	6.7%		0.8%	
Beijing Daxing	2,387,383			11.8%	
Tokyo Haneda	2,346,332	-48.5%		15.5%	
Charlotte	2,269,850	-7.7%		5.6%	
Chicago O'Hare	2,268,193	-45.2%		5.0%	
Los Angeles	2,209,523	-47.3%		3.5%	
Hangzhou	2,056,602	8.0%		0.4%	

Source: Schedules Analyser

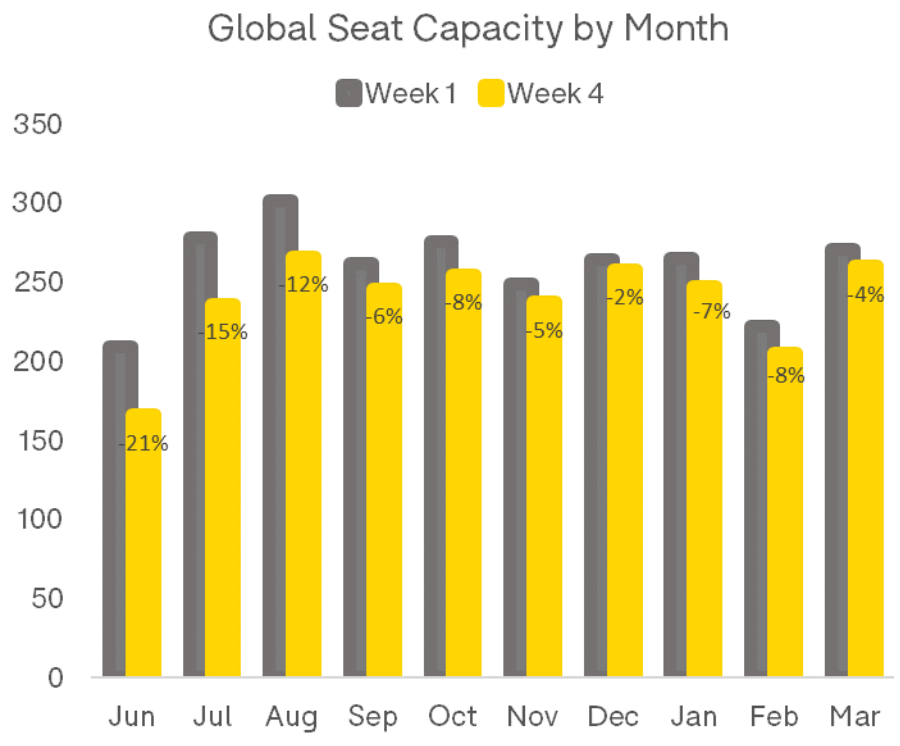
KEY POINTS

- Atlanta Airport, hub to Delta Air Lines, retains its position as the world's busiest airport and while capacity is still 26% below where it was in April 2019, it is barely changed from last month.
- United Airlines and American Airlines hubs at Dallas Ft. Worth, Denver and Charlotte are operating much closer to the April 2019 capacity level, benefitting from leisure sun and ski traffic, while Chicago O'Hare and Los Angeles show least signs of capacity recovery.
- Of the airports listed this month in the current Top 20, Tokyo Haneda saw the largest growth vs the previous month. However, the airport is still playing catchup as capacity at Japan's largest airport remains at almost half where it was this time in 2019.
- Both Beijing Capital Airport and Beijing Daxing Airport have seen capacity grow this month compared to March 2021, with growth of 16% at Daxing, and pointing to recovery in the Beijing market which has been affected by travel restrictions more than most other parts of China.

Seat Capacity April v March 2021

COVID19 IMPACTS

Each week in the month capacity for the full month continues to be revised downwards as carriers adjust capacity.



Source: Schedules Analyser

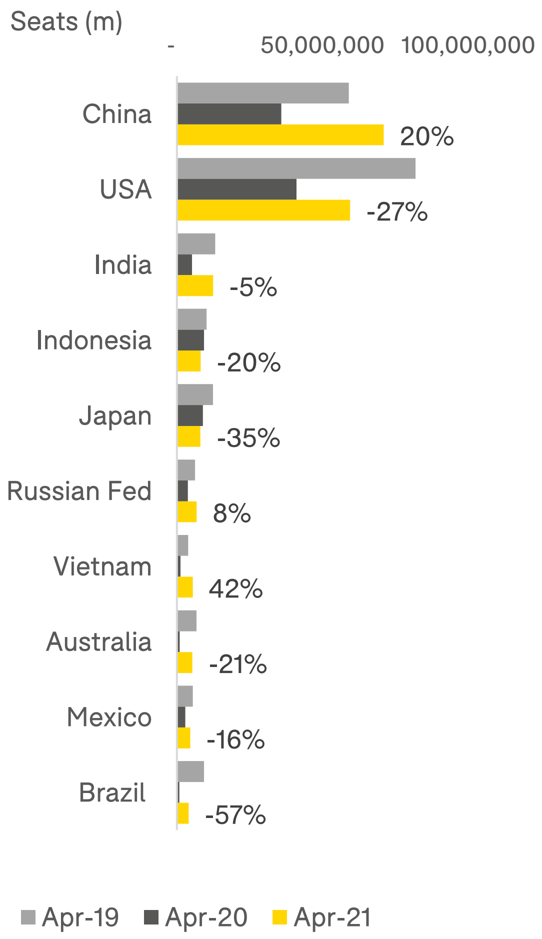
KEY POINTS

- Between the beginning and end of March 2021 capacity was reduced by just 4%, the lowest downward adjustment, aside from December 2020, for the past year.
- This shows that airlines are needing to make fewer late schedule changes and represents greater certainty for booked passengers.

KEY POINTS

- China remains the largest domestic scheduled air market in terms of capacity operating, followed by the US. Pre pandemic their positions were reversed.
- In April 2021 capacity in China is 20% higher than in April 2019, while US capacity is 27% below the April 2019 level.
- Of the current Top 10 domestic markets, Russia and Viet Nam are exhibiting the most growth, with Russia operating 8% more seats (12 million) in April 2021 than in April 2019, and Vietnam operating 42% more (1.6 million).

Top 10 Biggest Domestic Markets Seats April 2021 v 2020 & 2019



FREQUENCY & CAPACITY STATISTICS DECODED

- All data is sourced from OAG Schedules and is for the current month and previous months. Change in capacity and frequency is then calculated in each category against the same month in 2019 and against the previous month. Data is unadjusted for the leap year effect. Last month we shifted to ranking the Top 20's (Country Pairs, Airlines and Airports) by the current month, rather than using pre-COVID rankings.

- There are four categories as defined below:
  1. **Seats by Region** is seat capacity for the current month to, from and within each global sub region.
  2. **Top 20 Country Pairs** are those international country pairs with most seat capacity based on the current month.
  3. **Top 20 Airlines** are the 20 largest global airlines by flights based on the current month.
  4. **Top 20 Airports** are the 20 largest airports by capacity based on the current month.
  5. Each category includes a comparison in each of the above categories against the previous month, to highlight where frequency and capacity may be starting to recover.
  6. Data for April 2021 is based on OAG Schedules data as of 12th April 2021

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