FEBRUARY 2021

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OAG FREQUENCY & CAPACITY STATISTICS

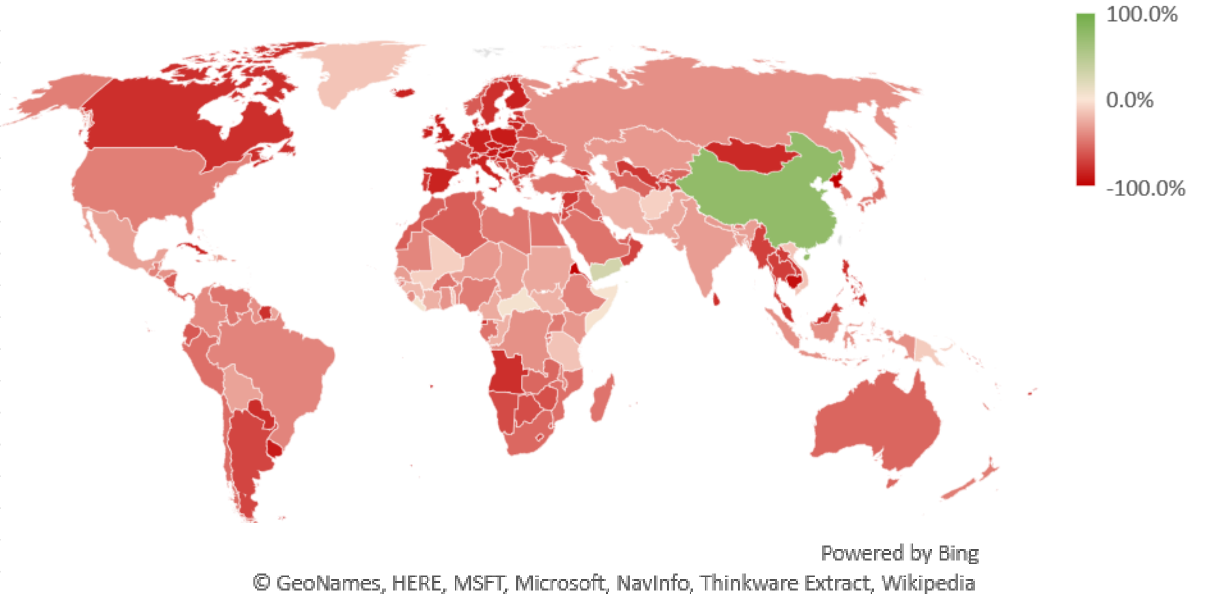
MAKE SMARTER MOVES

SEATS BY REGION

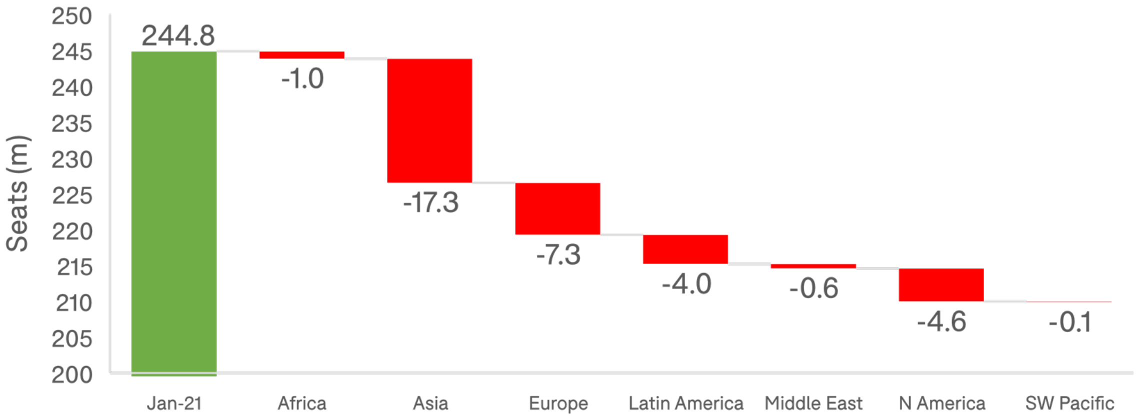
Region	Seats in Feb-21	Change v Feb-20	% Change	Change v Jan-21	% Change
Africa : Central/Western Africa	1,568,587	-41.5%		-12.9%	
Africa : Eastern Africa	1,811,050	-41.4%		-12.8%	
Africa : North Africa	1,853,132	-57.1%		-14.3%	
Africa : Southern Africa	1,308,287	-58.7%		-13.5%	
Asia : Central Asia	695,557	-51.0%		-5.1%	
Asia : North East Asia	65,452,811	4.9%		-17.8%	
Asia : South Asia	14,248,731	-34.0%		-6.9%	
Asia : South East Asia	17,355,106	-58.6%		-10.4%	
Europe : Eastern/Central Europe	6,071,034	-60.5%		-20.3%	
Europe : Western Europe	16,852,026	-79.1%		-25.4%	
Latin America : Caribbean	2,138,477	-49.1%		-12.1%	
Latin America : Central America	6,548,141	-35.1%		-12.9%	
Latin America : Lower South America	7,949,970	-49.8%		-20.8%	
Latin America : Upper South America	3,751,594	-47.6%		-15.6%	
Middle East	7,444,588	-59.4%		-7.5%	
North America	49,615,127	-47.9%		-8.5%	
Southwest Pacific	5,207,250	-54.2%		-1.6%	
Global	209,871,468	-47.4%		-14.3%	

Source: Schedules Analyser

Seat Capacity February 2021 v February 2020



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



KEY POINTS

- Capacity for the month of February is currently 47.4% below February 2020, and 14.3% (35 m seats) lower than last month. Each major region has seen capacity fall vs January 2021. In comparison to February 2020, only North East Asia saw an increase, due to the timing of when capacity began to fall in 2020 in China.
- The greatest decrease in the last month has been seen in Asia Pacific where carriers have taken 17.3m seats out of the schedule. Much of this is in North East Asia, where an 18% reduction month-on-month equates to 14.2m fewer seats this month. Reductions in China (-11.9m) and Japan (-1.5m) account for most of this lost capacity.
- Western Europe has seen the highest percentage reductions across all of the regions, with 25% fewer seats in February than January. Across Europe there are 7m fewer seats this month, reflecting the continuing lockdowns and travel restrictions that are in place across many European countries.
- Latin America has seen capacity slowdown this month right across the continent with 4m fewer seats. The lower part of South America has seen the largest percentage reductions, at 21% down.
- The US is also down this month, by 8.5% on last month, equivalent to 4m fewer seats.

TOP TWENTY COUNTRY PAIRS

Country Pairs	Country Pairs	Seats in Feb-21	Change v Feb-20	% Change	Change v Jan-21	% Change
MX-US	Mexico-USA	2,848,994	-7.7%		-13.0%	
AE-IN	UAE -India	1,069,823	-40.3%		5.2%	
DO-US	Dominican Rep-USA	708,292	23.6%		-7.7%	
PR-US	Puerto Rico-USA	598,296	-34.3%		-11.3%	
AE-PK	UAE -Pakistan	431,682	-25.5%		-6.5%	
JP-KR	Japan-South Korea	390,288	-73.9%		-11.1%	
EG-SA	Egypt-Saudi Arabia	363,152	-56.3%		-19.2%	
DE-ES	Germany-Spain	287,324	-83.4%		-35.5%	
DE-TR	Germany-Turkey	283,604	-69.2%		-17.5%	
JM-US	Jamaica-USA	276,862	-40.7%		-0.1%	
GB-US	United Kingdom-USA	272,003	-84.9%		-12.9%	
CO-US	Colombia-USA	269,722	-30.3%		-17.0%	
RU-TR	Russian Federation-Turkey	233,089	-27.5%		-29.1%	
ES-GB	Spain-United Kingdom	232,186	-90.9%		-59.3%	
CR-US	Costa Rica-USA	230,911	-38.7%		-7.9%	
CA-US	Canada-USA	224,325	-92.7%		-35.3%	
KR-US	South Korea -USA	224,020	-54.1%		-14.2%	
AE-EG	UAE -Egypt	223,957	-14.9%		-6.8%	
DE-US	Germany-USA	223,339	-75.1%		-15.3%	
FR-MA	France-Morocco	223,156	-66.5%		-34.5%	

Source: Schedules Analyser

KEY POINTS

- Mexico-US remains the largest international country pair this month, but capacity has fallen in the last month by 13% vs January, a reduction of 425,00 seats. Whilst this market had almost recovered to pre COVID levels last month, it's since fallen back to -8% compared to February last year. Other important leisure and VFR markets to and from the US, including Puerto Rico, the Dominican Republic, Colombia and Costa Rica are also experiencing capacity reductions this month, in a change to last month's trend.

- One of the biggest impacts this month in terms of capacity reductions is the formerly largest country pair, Spain-United Kingdom, where capacity has fallen by 59% this month compared to January, resulting in nearly 340,000 fewer seats. Germany-Spain is also down by a considerable amount, with 36% fewer seats this month.

- The only market showing growth compared to last month is the UAE-India which recorded 5% more seats in February, continuing the trend of recent months.

- Perhaps surprisingly, a market which had previously been showing strong growth, the Russian Federation – Turkey, has also seen capacity cut back this month, by 29%, equivalent to nearly 100,000 less seats.

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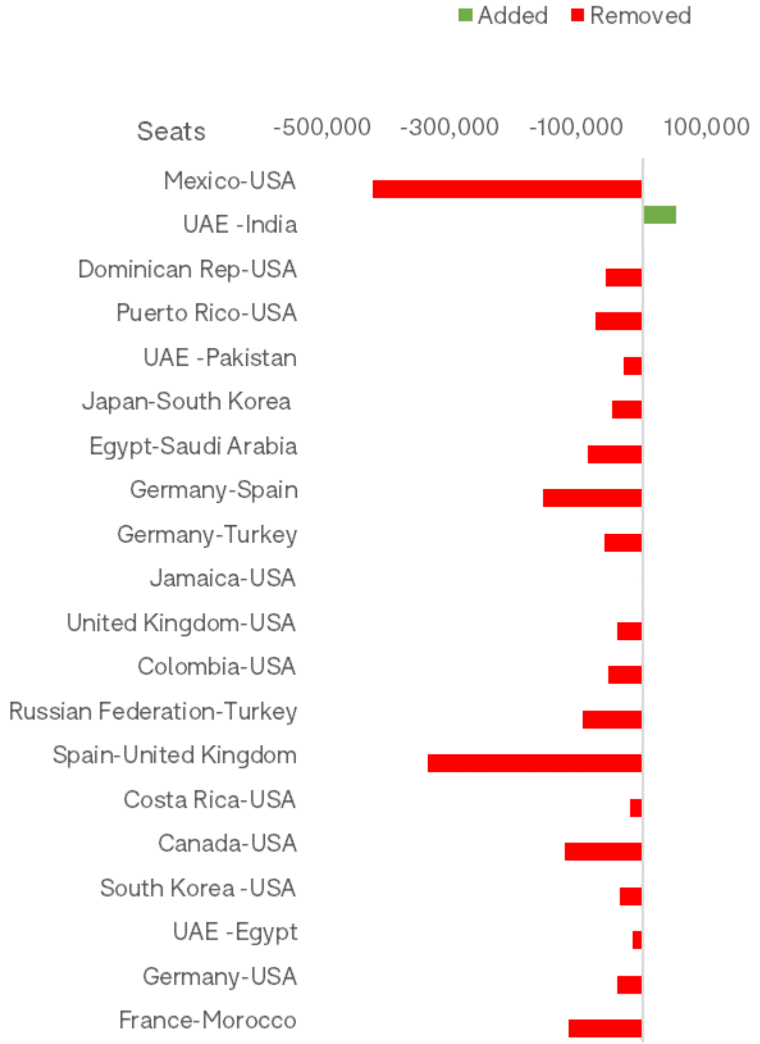
Seat Capacity February v January 2021



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TOP TWENTY AIRLINES

Airlines	Flights in Feb-21	Change v Feb-20	% Change	Change v Jan-21	% Change
American Airlines	100,262	-44.9%		-9.4%	
Delta Air Lines	90,901	-38.4%		-9.6%	
United Airlines	72,012	-48.6%		-6.5%	
Southwest Airlines	53,764	-48.3%		-14.0%	
China Eastern Airlines	42,761	83.0%		-24.2%	
China Southern Airlines	42,391	37.3%		-18.5%	
IndiGo	34,227	-24.9%		-5.8%	
Air China	30,244	58.2%		-13.9%	
Alaska Airlines	24,861	-30.8%		-2.5%	
All Nippon Airways	21,627	-20.8%		-10.5%	
LATAM Airlines Group	20,061	-53.6%		-14.8%	
China Express Airlines	19,413	199.4%		-6.3%	
Shenzhen Airlines	16,793	167.7%		-14.8%	
Azul Airlines	16,768	-28.5%		-23.9%	
Xiamen Airlines Company	15,652	19.6%		-11.3%	
Turkish Airlines	15,500	-55.4%		-6.7%	
Hainan Airlines	14,826	114.4%		-24.9%	
Spring Airlines	13,730	14.8%		-1.8%	
JetBlue Airways Corporation	13,679	-51.8%		5.1%	
Sichuan Airlines	12,883	39.8%		-26.7%	

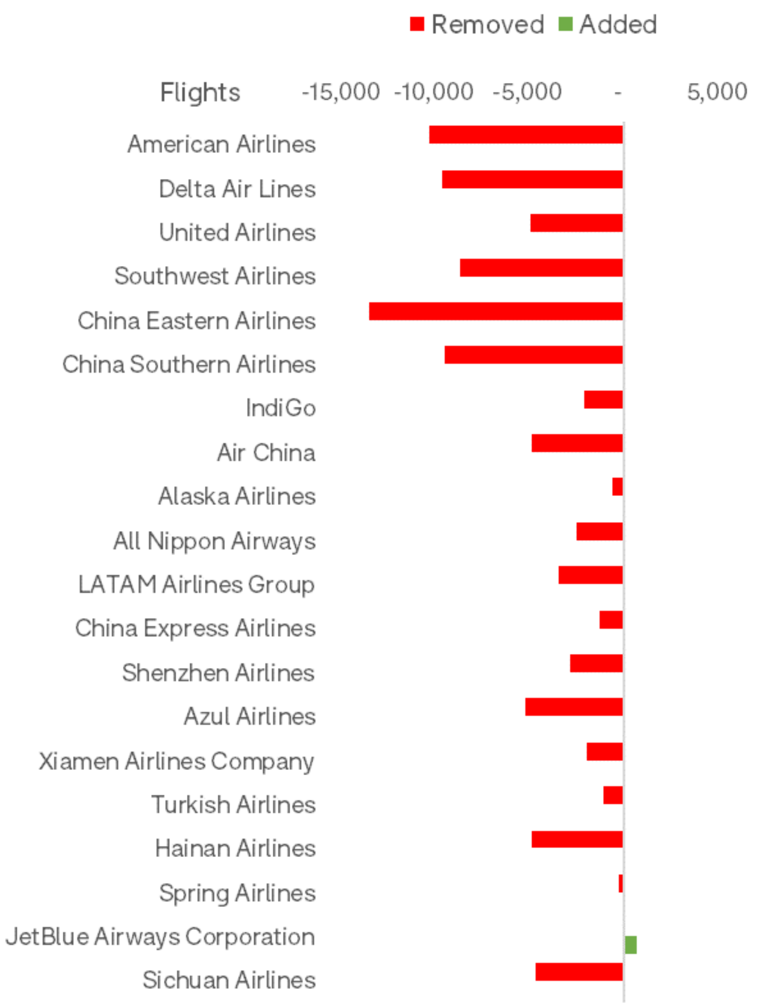
Source: Schedules Analyser

KEY POINTS

- With the exception of JetBlue, all of the other Top 20 biggest airlines plan to operate fewer flights this month than last month. The US majors have all reduced frequencies this month, ranging from between 7-14% below last months' levels. Southwest is at the biggest end of the scale, with 14% fewer flights, or nearly 8,800 fewer flights.

- The big 3 Chinese carriers have all reduced flights by a considerable proportion as the Chinese government has encouraged people to stay home for the holiday season. China Eastern has removed most flights from its schedule (13,600), equating to 24% fewer flights than last month. China Southern is not much further behind, with 19% fewer flights than in January 2021 and Air China is at 14% fewer flights.

Flights in February v January 2021



TOP TWENTY AIRPORTS

Airports	Seats in Feb-21	Change v Feb-20	% Change	Change v Jan-21	% Change
Atlanta	3,077,420	-34.8%		-9.3%	
Guangzhou	2,472,801	29.1%		-24.5%	
Dallas/Fort Worth	2,337,208	-28.6%		-10.5%	
Chengdu	2,269,937	47.3%		-12.9%	
Delhi	2,212,245	-37.6%		-6.6%	
Tokyo Haneda	2,169,833	-48.7%		-17.5%	
Chongqing	2,156,946	67.5%		-15.9%	
Denver	2,142,929	-26.1%		-8.2%	
Jakarta	2,100,406	-38.0%		-13.5%	
Shenzhen	2,075,928	53.7%		-19.6%	
Beijing	1,971,222	-8.6%		-18.9%	
Ho Chi Minh City	1,934,108	-12.6%		19.4%	
Los Angeles	1,771,323	-51.7%		-11.8%	
Shanghai Hongqiao	1,716,303	62.8%		-24.7%	
Kunming	1,710,052	62.9%		-25.5%	
Dubai	1,663,032	-61.3%		-10.4%	
Chicago O'Hare	1,654,448	-53.4%		-6.3%	
Shanghai Pudong	1,615,350	-11.3%		-25.7%	
Xi'an Xianyang Apt	1,612,464	65.8%		-25.1%	
Charlotte	1,580,314	-35.3%		-9.3%	

Source: Schedules Analyser

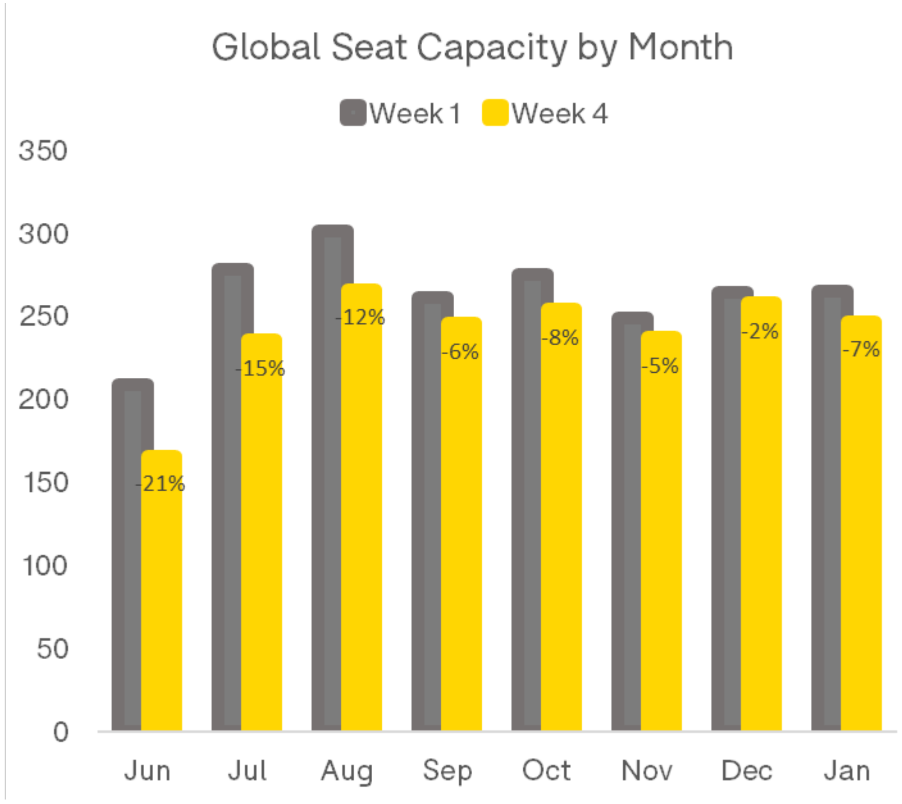
KEY POINTS

- Capacity reductions in China this month push Atlanta back into the Top spot in terms of largest airport in the world by seat volume.
- The impact of the reductions in China's capacity is evident across the largest of China's airports which remain in the Top 20, although further down the rankings. Beijing has fallen from 3rd place to 11th, whilst Shanghai Pudong is down from 11th to 18th.
- Climbing up the rankings is Dallas/Fort Worth, now 3rd largest compared to 7th last month.
- Of the Top 20, only Ho Chi Minh City in Vietnam has seen capacity added this month compared to last month, with 19% more seats scheduled.

Seat Capacity February v January 2021

COVID19 IMPACTS

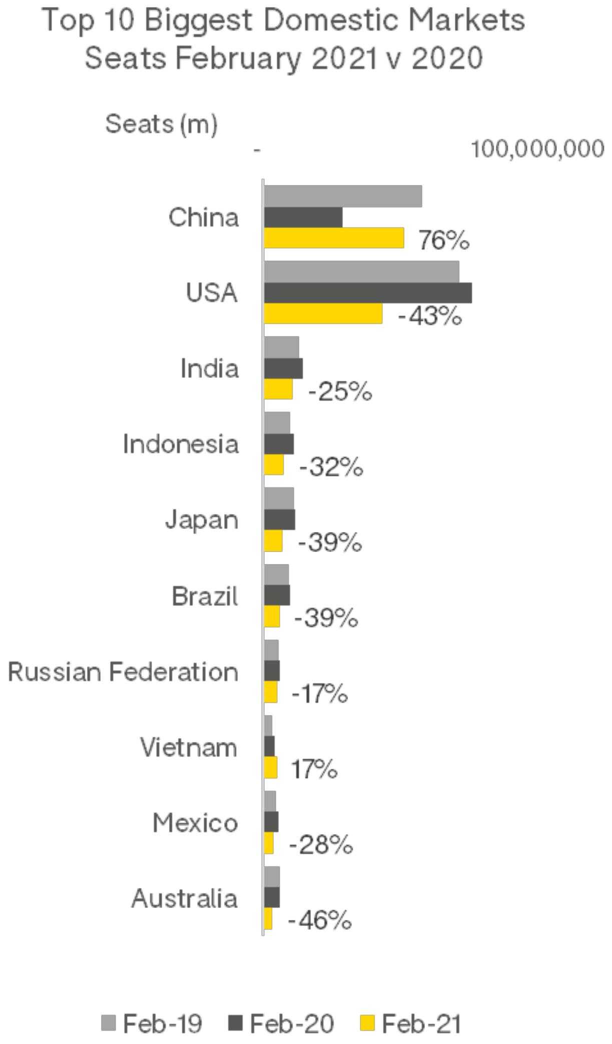
Each week in the month capacity for the full month continues to be revised downwards as carriers adjust capacity.



Source: Schedules Analyser

KEY POINTS

- Changing the trend of recent months, which had seen a reduced level of change in capacity between the start and end of each month, in January capacity fell by 7% over the course of the month, starting at 265m seats and ending the month at 247m.
- Significant capacity reductions have already been seen in the first week of February with 10.5m fewer seats in the schedule for February as a whole than were in the schedule at the start of the month.
- China remains the largest domestic market this month, and in comparison with February last year, the capacity trend looks positive. February 2020 was when COVID significantly impacted China's capacity, however, as the 2019 v 2020 comparison shows.
- Vietnam is the only one of the Top 10 domestic markets so far which has seen capacity recover beyond 2019 and 2020 levels.



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 the previous year 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 February 2021 is based on OAG Schedules data as of 8th February 2021

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