

APRIL 2020

OAG®

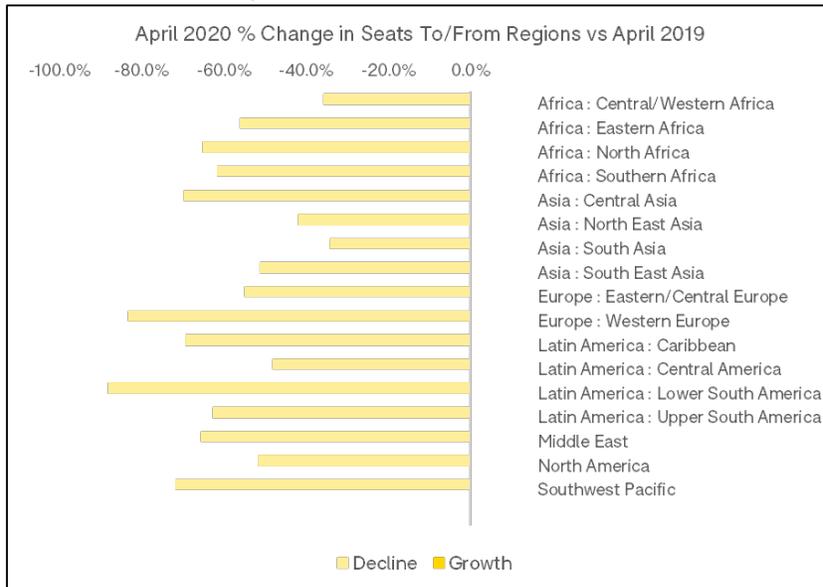
OAG FREQUENCY & CAPACITY STATISTICS

MAKE SMARTER MOVES

SEATS BY REGION

Region	Apr-20	Change	Latest 12 months	Change
Africa : Central/Western Africa	1,562,345	-35.8%	31,265,369	1.4%
Africa : Eastern Africa	1,306,037	-56.1%	37,098,088	-2.4%
Africa : North Africa	1,638,346	-65.2%	53,596,735	-2.4%
Africa : Southern Africa	1,293,608	-61.6%	38,399,888	-4.3%
Asia : Central Asia	469,132	-69.9%	17,987,908	-3.6%
Asia : North East Asia	59,457,382	-41.8%	1,151,962,664	-5.2%
Asia : South Asia	12,931,384	-34.1%	250,333,646	-0.8%
Asia : South East Asia	20,712,939	-51.2%	499,263,532	-4.0%
Europe : Eastern/Central Europe	7,986,276	-54.9%	216,587,544	-1.0%
Europe : Western Europe	16,644,177	-83.3%	1,096,432,170	-8.1%
Latin America : Caribbean	1,262,841	-69.4%	45,080,249	-4.2%
Latin America : Central America	5,231,055	-48.0%	118,382,077	1.8%
Latin America : Lower South America	1,744,351	-88.2%	175,924,191	-8.6%
Latin America : Upper South America	2,624,574	-62.7%	84,473,792	-0.9%
Middle East	6,408,524	-65.5%	216,882,853	-6.2%
North America	49,884,647	-51.5%	1,204,085,307	-2.0%
Southwest Pacific	3,435,874	-71.8%	136,906,980	-6.6%
Global	194,593,492	-58.3%	5,374,662,993	-4.5%

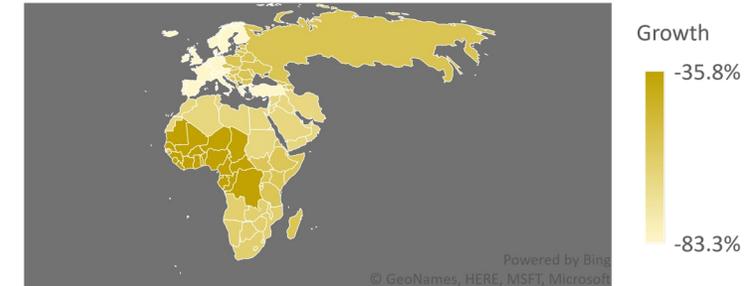
Source: Schedules Analyser



KEY POINTS

- Every region will see significant reductions in capacity in April when compared with last April. At the start of April OAG schedules anticipate 58% less capacity than last year but the situation is evolving rapidly.
- The worst affected region in percentage terms is Lower South America where seats will fall by 88%. Western Europe is a close second with 83% fewer seats in April 2020 compared to April 2019.
- Overall, this equates to 272 million fewer scheduled seats than last April. In absolute terms the regions with the largest reductions in capacity are Western Europe, down 83 million seats, North America down by 53 million seats, and North East Asia, down by 42 million seats.

Europe, Middle East & Africa



* Due to incomplete schedules data, OAG is unable to include Iran in the Middle East region totals



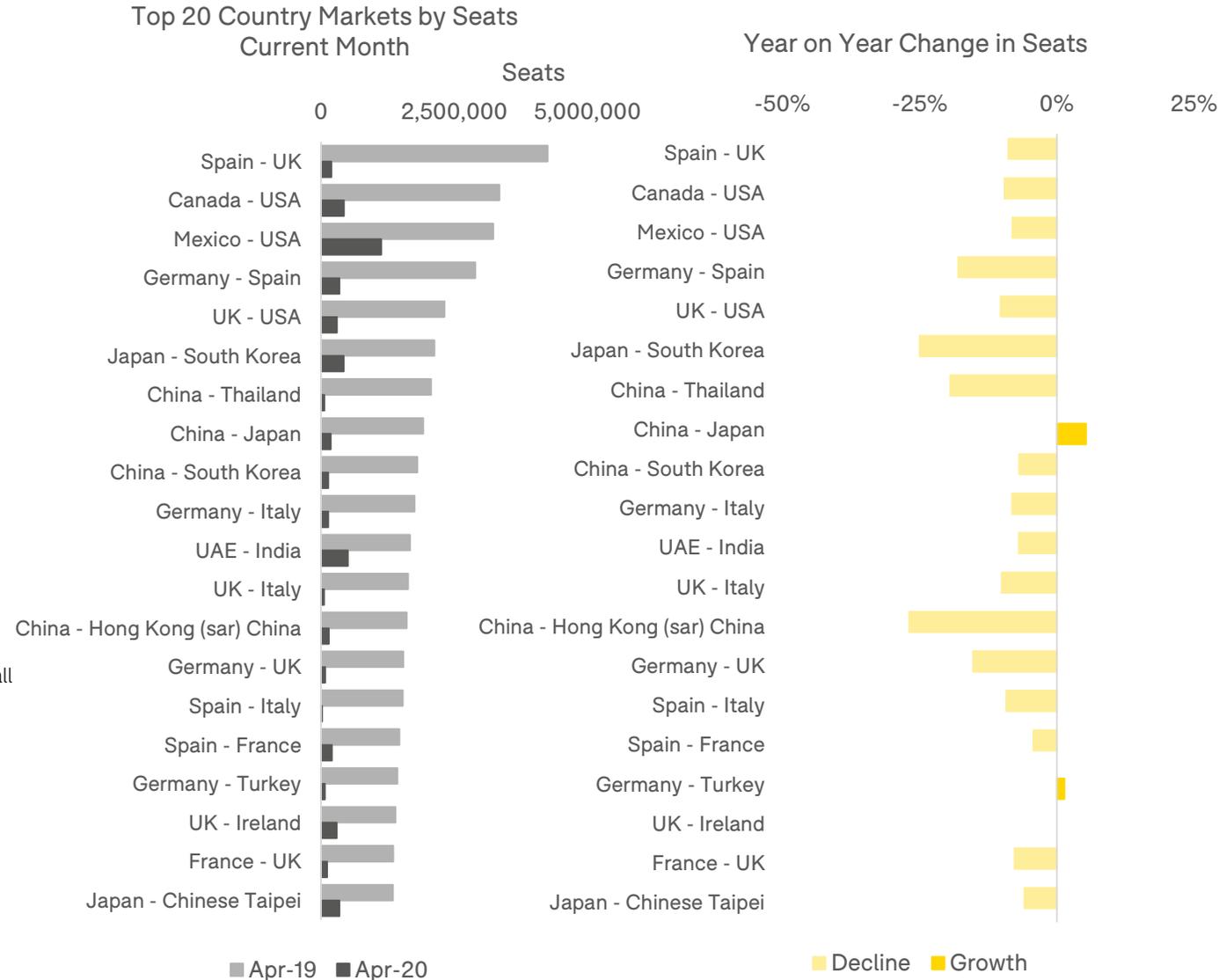
TOP TWENTY COUNTRY PAIRS

Country Pairs	Apr-20	Change	Latest 12 months	Change
Spain - UK	197,144	-95.4%	44,253,137	-8.8%
Canada - USA	429,838	-87.2%	35,816,796	-9.5%
Mexico - USA	1,129,499	-65.1%	35,031,118	-8.1%
Germany - Spain	345,256	-88.1%	28,697,954	-18.0%
UK - USA	300,848	-87.0%	24,317,603	-10.2%
Japan - South Korea	428,057	-79.9%	19,499,355	-25.0%
China - Thailand	62,910	-97.0%	21,502,890	-19.4%
China - Japan	184,921	-90.4%	22,284,367	5.3%
China - South Korea	135,140	-92.5%	19,670,667	-6.9%
Germany - Italy	136,386	-92.2%	17,478,198	-8.1%
UAE - India	502,576	-69.9%	20,406,248	-6.9%
UK - Italy	57,316	-96.5%	16,444,283	-10.1%
China - Hong Kong (sar) China	149,064	-90.7%	13,832,611	-26.9%
Germany - UK	78,914	-94.9%	16,216,528	-15.2%
Spain - Italy	23,742	-98.5%	16,359,011	-9.2%
Spain - France	207,731	-85.9%	14,945,407	-4.3%
Germany - Turkey	73,878	-94.9%	17,552,046	1.4%
UK - Ireland	294,491	-78.9%	14,983,655	-8.7%
France - UK	113,804	-91.6%	13,651,620	-7.7%
Japan - Chinese Taipei	349,619	-74.1%	15,244,641	-5.9%

Source: Schedules Analyser

KEY POINTS

- In April 2019, the single largest country pair market was Spain-UK, which was seen seat capacity fall from by 4 m to just under 0.2m.
- All of the other Top 20 largest country pairs have seen similar reductions, averaging reductions of 88% this April compared to last year.
- Of the 2,764 country pairs which had some scheduled capacity in April 2019, 750 have none at all this month.
- While Chinese aviation has been affected sooner than most countries by Covid-19, the recent strength of its air services to Japan mean that over the past 12 months, this country-pair is still showing a positive increase in capacity. In April it is down by 90% however. China-Thailand, previously the largest outbound market for China, has seen almost all capacity withdraw, with 97% fewer seats this month compared to last year.
- Very few seats remain between the UK and Italy, one of the worst affected countries.



TOP TWENTY AIRLINES

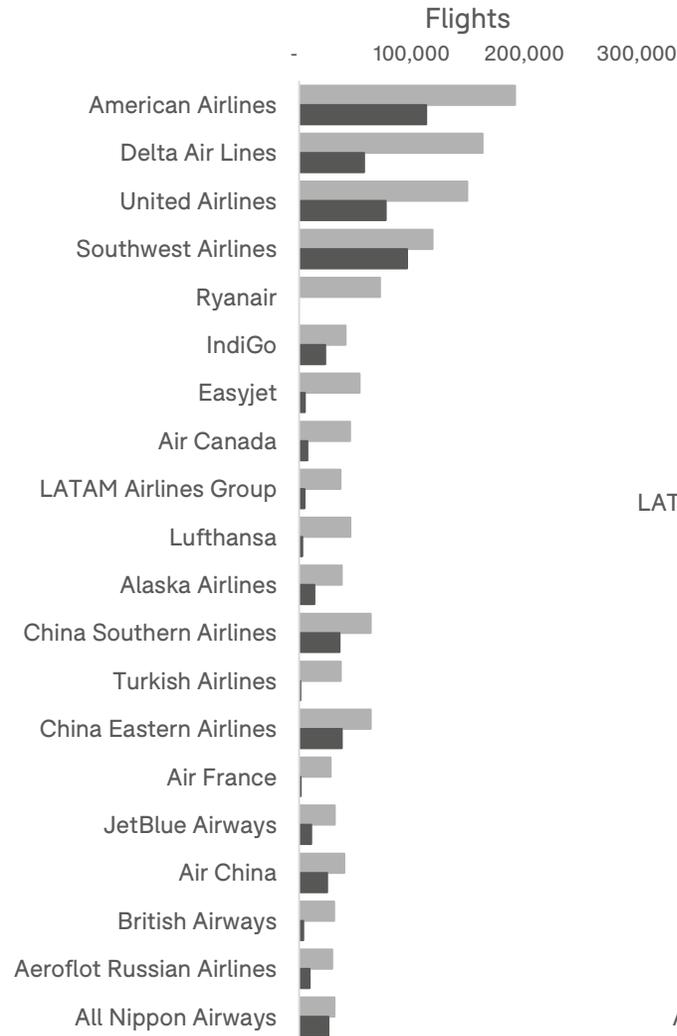
Airlines	Apr-20	Change	Latest 12 months	Change
American Airlines	112,741	-41.2%	2,291,373	-1.0%
Delta Air Lines	57,640	-64.6%	1,862,865	-2.8%
United Airlines	76,873	-48.5%	1,749,681	-1.6%
Southwest	95,766	-19.2%	1,372,278	-1.9%
Ryanair	-	-100.0%	716,083	-6.2%
IndiGo	23,024	-44.2%	518,635	14.7%
Easyjet	4,975	-90.7%	551,728	-7.2%
Air Canada	7,250	-84.0%	511,540	-13.6%
LATAM Airlines Group	4,854	-86.7%	472,424	7.4%
Lufthansa	2,768	-93.9%	477,623	-13.0%
Alaska Airlines	13,574	-64.2%	448,058	-0.8%
China Southern	35,828	-43.7%	720,721	-7.5%
Turkish Airlines	1,111	-97.0%	430,855	-11.5%
China Eastern	37,749	-40.5%	706,815	-6.9%
Air France	1,250	-95.5%	336,956	1.0%
JetBlue Airways	10,793	-65.8%	349,921	-6.6%
Air China	24,782	-38.3%	450,584	-8.1%
British Airways	3,703	-88.1%	332,030	-9.6%
Aeroflot	9,350	-68.0%	339,270	-5.2%
All Nippon Airways	25,962	-17.2%	359,967	0.6%

KEY POINTS

Source: Schedules Analyser

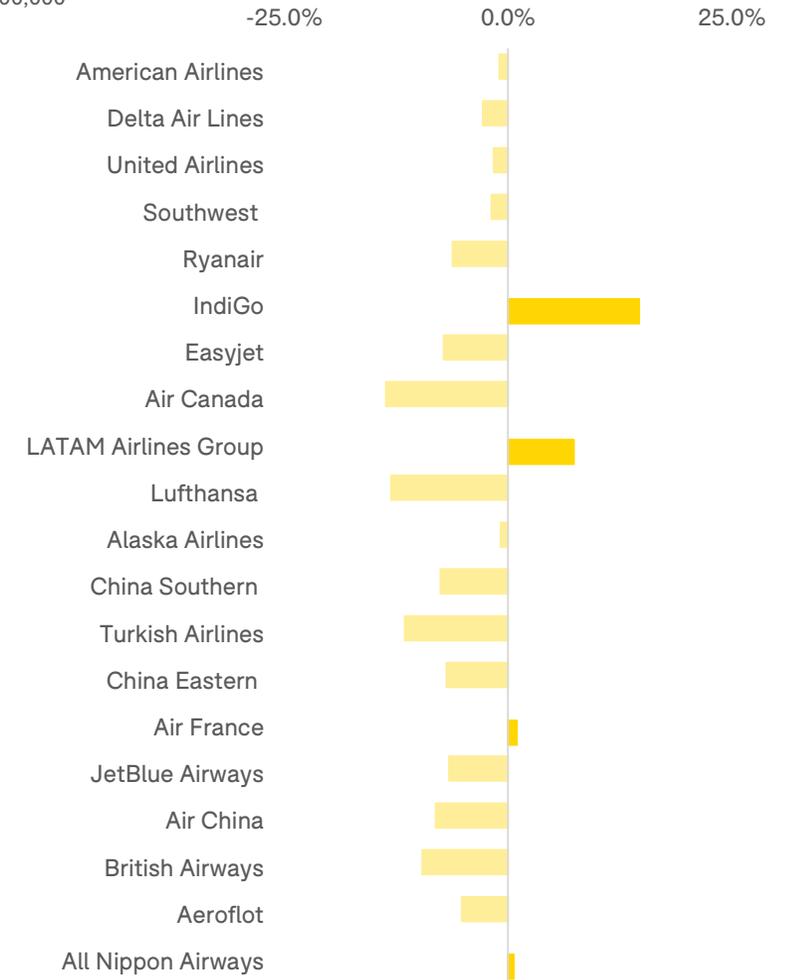
- Note – this data references the airlines which were among the Top 20 largest airlines by seats in April 2019.
- Airlines are making significant changes to their schedules, and continue to do so. Among the Top 20 airlines with the most dramatic adjustments to date is Ryanair which announced that its entire fleet would be grounded for a period. While other airlines have announced such changes these are yet to be visible in their schedules.
- Airline schedules for April 2020 show that both US carriers and Chinese carriers are among those airlines with the smallest reductions in capacity. While in China this is partly attributable to an element of recovery in the market, the US airlines still in the process of implementing major schedule adjustments. Both countries also have sizeable domestic markets which are as yet less affected by the travel restrictions being put in place to limit travel between countries.

Top 20 Airlines by Flights Current Month



■ Apr-19 ■ Apr-20

Year on Year Change in Flights



■ Decline ■ Growth

TOP TWENTY AIRPORTS

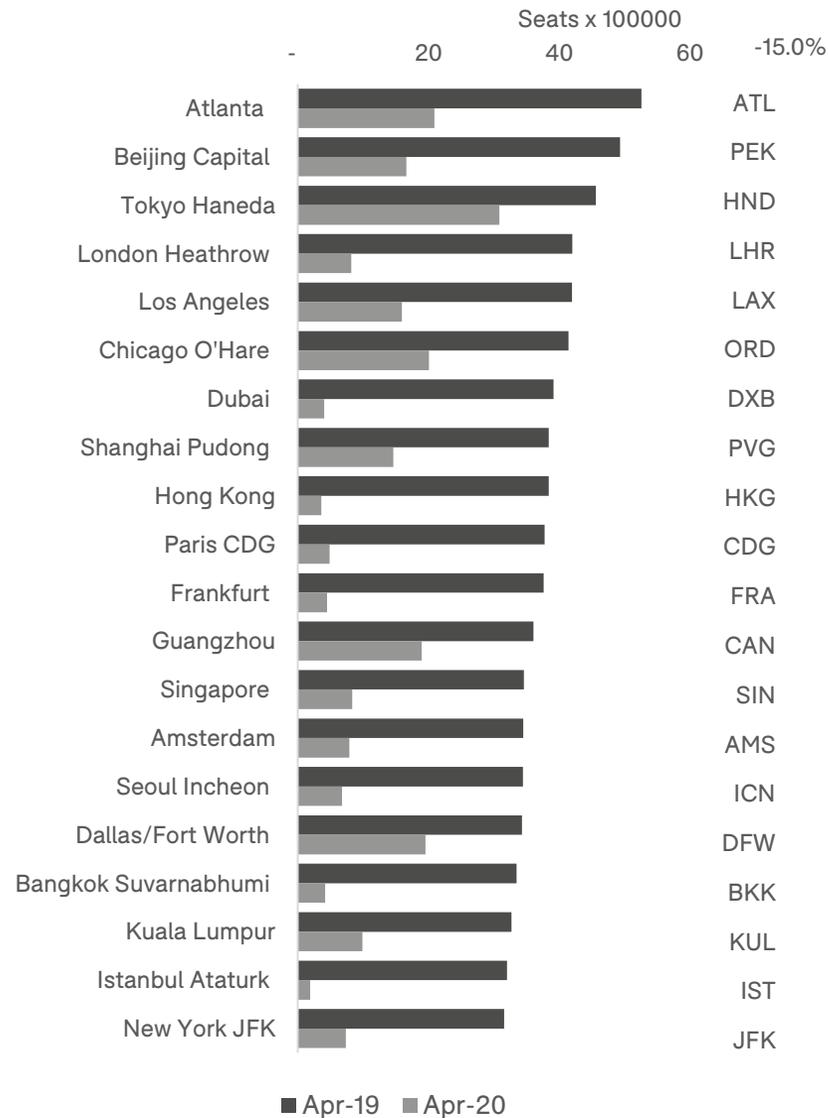
Airports	Apr-20	Change	Latest 12 months	Change
Atlanta	2,087,912	-60.2%	63,494,676	1.8%
Beijing Capital	1,659,729	-66.3%	57,367,988	-8.7%
Tokyo Haneda	3,082,741	-32.3%	54,922,985	1.7%
London Heathrow	814,970	-80.6%	50,226,509	0.7%
Los Angeles	1,590,019	-62.1%	51,142,247	-1.7%
Chicago O'Hare	2,003,216	-51.6%	50,479,143	1.5%
Dubai	403,701	-89.7%	53,470,362	-6.3%
Shanghai Pudong	1,461,496	-61.9%	43,284,463	-5.3%
Hong Kong	356,592	-90.7%	40,905,407	-10.9%
Paris CDG	487,556	-87.1%	45,045,650	2.6%
Frankfurt	447,048	-88.1%	44,998,530	0.3%
Guangzhou	1,893,385	-47.4%	42,384,872	-1.6%
Singapore	832,180	-75.9%	41,654,486	-1.2%
Amsterdam	785,290	-77.2%	41,394,327	1.3%
Seoul Incheon	677,034	-80.3%	41,505,793	0.4%
Dallas/Fort Worth	1,949,404	-43.1%	44,323,020	8.7%
Bangkok Suvarnabhumi	416,658	-87.5%	40,093,157	-2.8%
Kuala Lumpur	985,535	-69.8%	39,296,229	1.8%
Istanbul Ataturk	190,384	-94.0%	42,344,354	1.7%
New York JFK	733,309	-76.8%	37,789,582	-0.6%

Source: Schedules Analyser

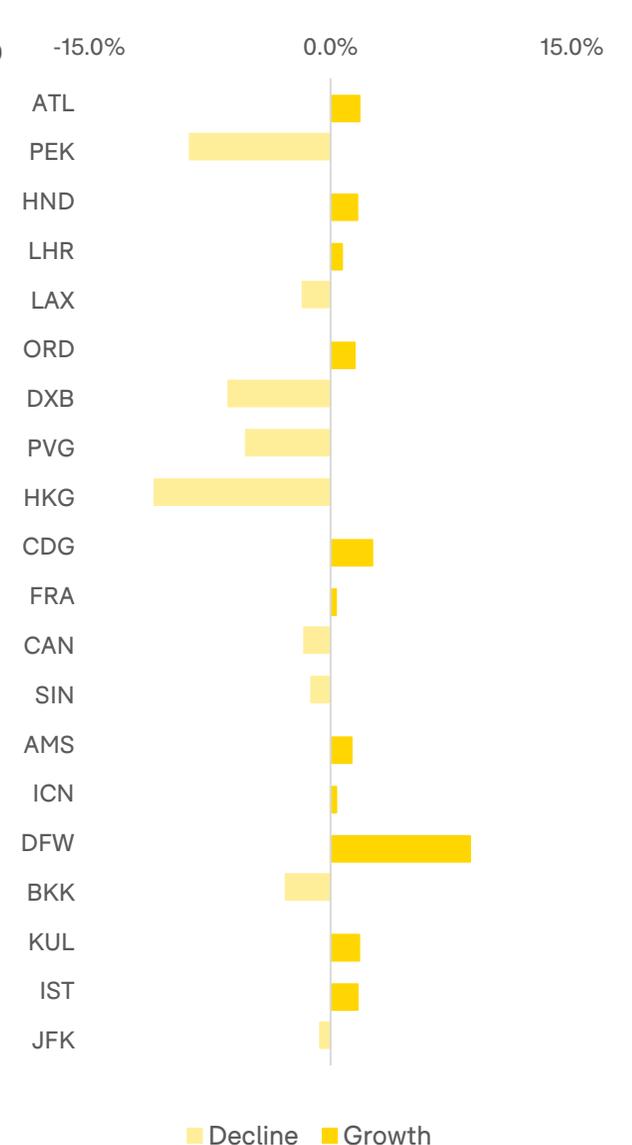
KEY POINTS

- Note – the airports in the Top 20 are those airports ranked in the Top 20 for capacity in April 2019.
- 17 of the 20 airports will see capacity shrink by more than 50% this month and all of them report at least a 30% reduction in capacity compared to April 2019.
- Among those where capacity for the past 12 months is still more than the preceding 12 months, three are in the US where the impact of the current crisis has come later.
- Through this period, the rapid changes in capacity at airports means that the ranking of airports globally is changing all the time. Airports which were ranked among the Top 5 in the world will see their position slip further down the rankings, while others that have seen capacity reductions take longer to come into effect will temporarily rise up the rankings.

Top 20 Airports by Seats Current Month

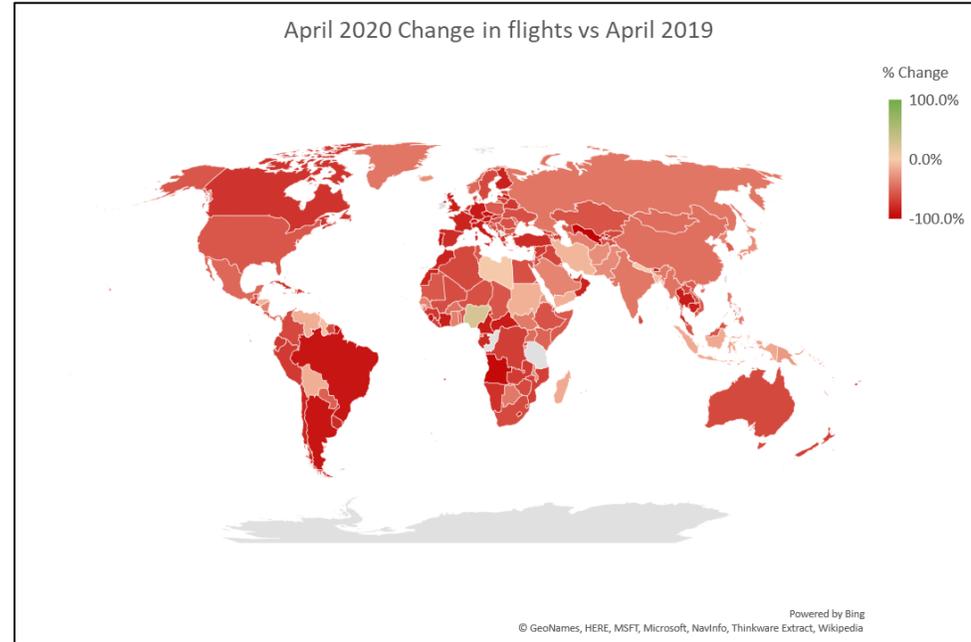


Year on Year Change in Flights

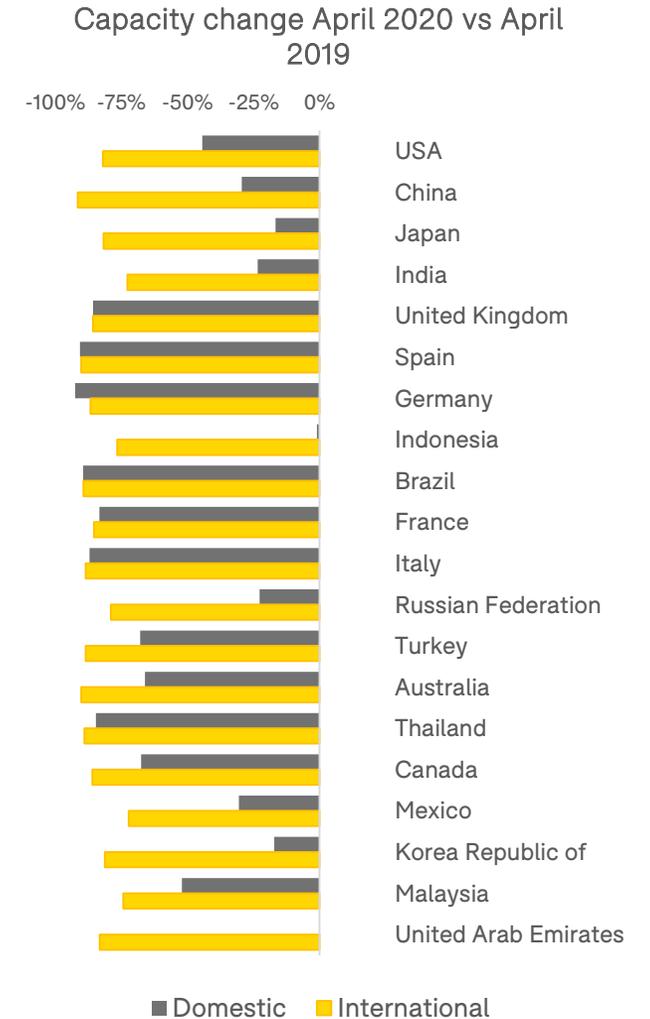


COVID19 IMPACTS

Top 20 Countries - Departing Frequencies		
Frequency Change April 2020 v's April 2019		
Country	Apr-20	% Change
USA	418,740	-46.2%
China	260,048	-34.2%
India	68,519	-29.1%
Japan	69,373	-28.1%
Canada	28,760	-68.7%
United Kingdom	14,132	-84.6%
Spain	7,879	-90.3%
Germany	10,545	-86.9%
Indonesia	69,659	-10.1%
Brazil	7,299	-89.2%
Russian Federation	39,418	-40.6%
France	11,372	-82.2%
Australia	23,006	-61.7%
Italy	7,629	-87.0%
Mexico	28,834	-47.6%
Turkey	10,345	-77.8%
Thailand	5,826	-86.6%
Malaysia	15,491	-57.7%
Korea Republic of	16,928	-53.1%
Saudi Arabia	19,467	-33.8%



Source: Schedules Analyser



HIGHLIGHTS

- Among the Top 20 countries with the largest number of departing frequencies in April 2019, European countries are among those with the highest reductions in frequencies in April 2020, with Spain showing the largest reduction at 90% fewer flights.
- The effect of actions by many countries to close down international routes means there is a different pace of frequency reductions between domestic and international markets in many countries. China has seen international capacity fall by 80% following increased restrictions on inbound traffic, while China's domestic market has seen frequency slowly start to return. The US has seen a similar scale of reductions in international flights, however there are undoubtedly more reductions still to come in the US domestic market.
- The Top 20 countries where domestic frequencies make up over three quarters of all flights include the US, China, India, Japan, Indonesia, Brazil and Australia. Of these countries, Japan, Indonesia and the Russian Federation have yet to see any significant reductions to their domestic markets.
- Germany and the UK are the two countries where international frequencies make up the highest proportion of all flights.

FREQUENCY & CAPACITY STATISTICS DECODED

- All data is sourced from [OAG Schedules](#) and is for the current month and rolling 12 months. Change in capacity and frequency is then calculated in each category against the same month in the previous year, and for the previous 12 months. Data is unadjusted for the leap year effect.
- 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 equivalent month last year. Seats for the rolling 12 months are then included for those country pairs.
 3. **Top 20 Airlines** are the 20 largest global airlines by flights based on the equivalent month last year. Flights for the rolling 12 months are then included for those airlines.
 4. **Top 20 Airports** are the 20 largest airports by capacity based on the equivalent month last year. Capacity for the rolling 12 months is then included for those airports.

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