

MAY 2020

OAG®

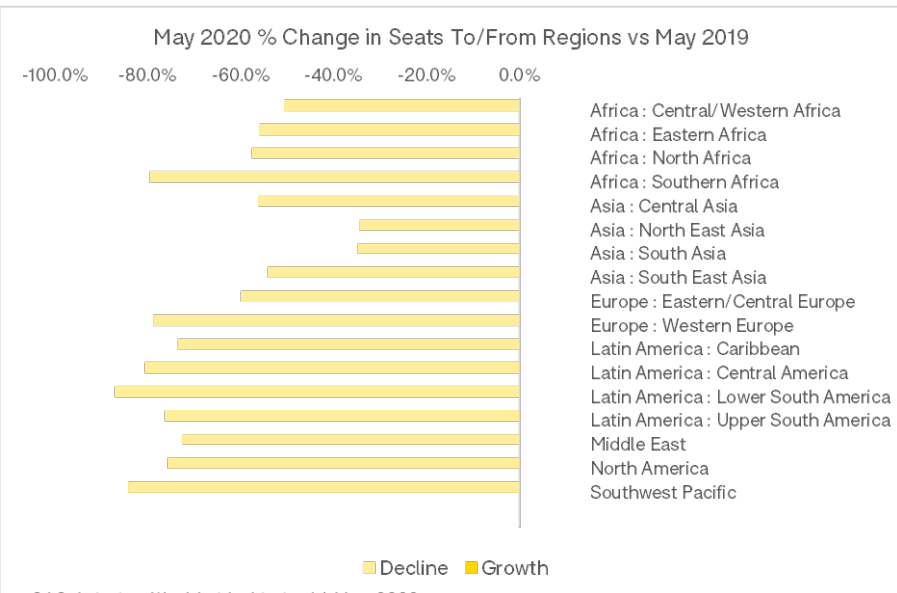
OAG FREQUENCY & CAPACITY STATISTICS

MAKE SMARTER MOVES

SEATS BY REGION

Region	May-20	Change	Latest 12 months	Change
Africa : Central/Western Africa	1,170,848	-50.4%	29,583,548	-3.4%
Africa : Eastern Africa	1,336,891	-56.0%	34,949,760	-8.2%
Africa : North Africa	1,901,236	-57.5%	50,465,502	-8.0%
Africa : Southern Africa	701,075	-79.5%	35,196,645	-12.6%
Asia : Central Asia	705,428	-56.2%	16,884,056	-10.0%
Asia : North East Asia	69,392,017	-34.3%	1,107,322,848	-9.3%
Asia : South Asia	13,383,542	-34.9%	237,442,649	-5.7%
Asia : South East Asia	19,605,795	-54.1%	470,163,539	-9.6%
Europe : Eastern/Central Europe	7,948,607	-59.8%	202,251,575	-8.3%
Europe : Western Europe	23,063,246	-78.7%	1,004,517,717	-16.0%
Latin America : Caribbean	1,032,193	-73.5%	41,991,654	-11.2%
Latin America : Central America	1,959,536	-80.5%	108,967,736	-6.9%
Latin America : Lower South America	1,961,111	-87.0%	162,537,524	-15.3%
Latin America : Upper South America	1,745,420	-76.2%	78,237,518	-8.8%
Middle East	5,055,213	-72.5%	202,128,244	-12.3%
North America	26,133,321	-75.7%	1,117,174,587	-9.4%
Southwest Pacific	1,906,070	-84.0%	125,169,456	-14.6%
Global	179,001,549	-63.2%	5,024,984,558	-11.0%

Source: Schedules Analyser



Asia



Latin America

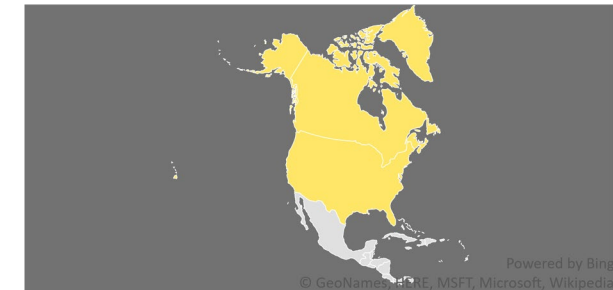


Europe, Middle East & Africa



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

North America



Southwest Pacific



KEY POINTS

- May 2020 sees a sharp reduction in capacity with global seats now 63% below where they were year ago (down from -45% last month).
- Capacity reductions as a result of restrictions on travel, border closures and plummeting demand are apparent in every region; North East Asia and South Asia are least affected with seats 34% below last May, while at the other extreme Southwest Pacific, Lower South America and Central America have seen capacity reductions exceed 80%.
- Western Europe, North America, Upper South America and Southern Africa all have airline capacity of less than 25% the level a year ago.
- The cumulative impact of COVID-19 on air travel means that for the 12 months to May, there has now been a fall of 11% in airline capacity, or 620 million seats.

TOP TWENTY COUNTRY PAIRS

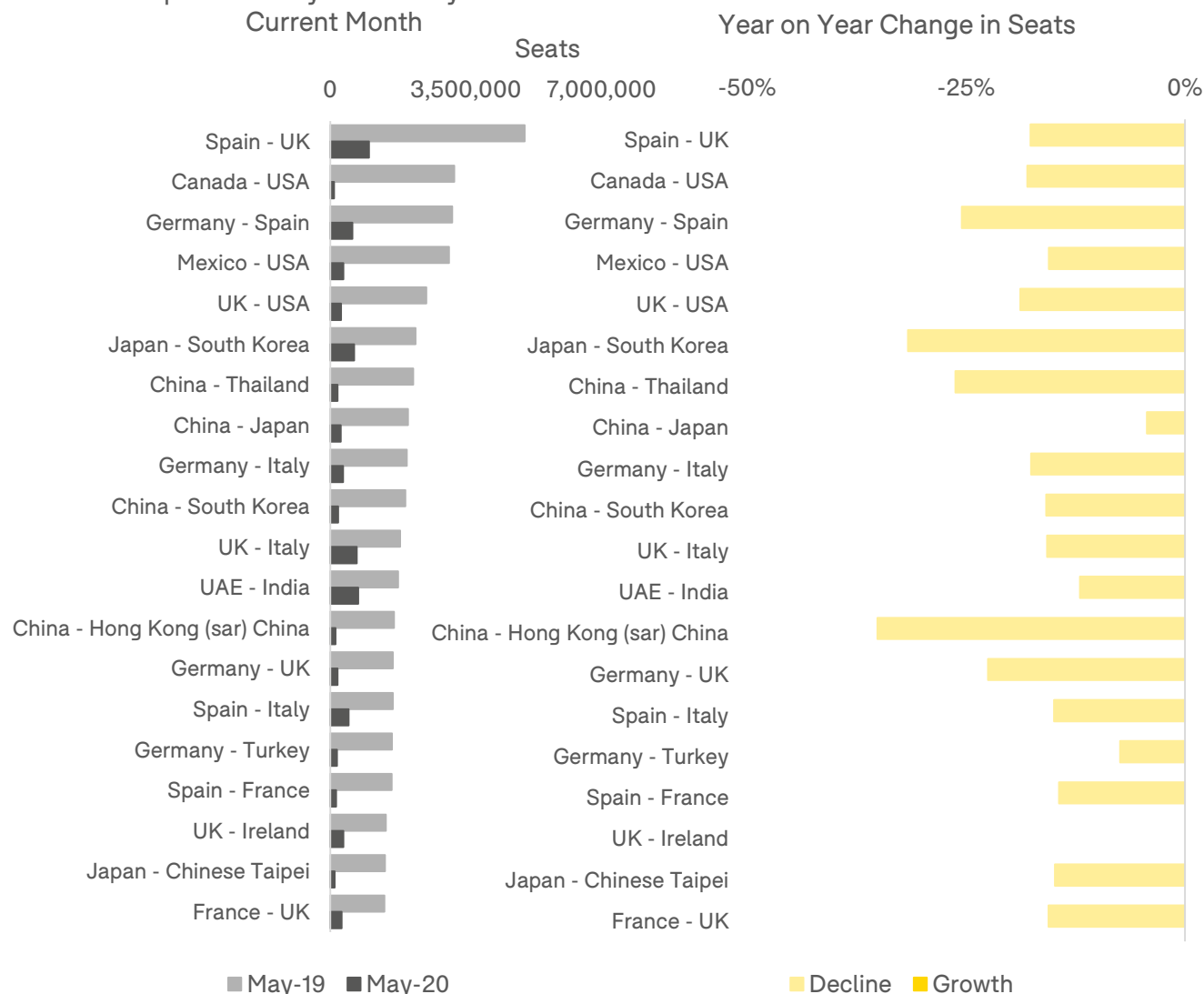
Country Pairs	May-20	Change	Latest 12 months	Change
Spain - UK	999,157	-80.1%	40,211,331	-17.6%
Canada - USA	100,894	-96.8%	32,537,262	-18.0%
Germany - Spain	574,457	-81.7%	25,981,436	-25.5%
Mexico - USA	341,787	-88.8%	32,136,220	-15.6%
UK - USA	282,242	-88.6%	22,008,632	-18.8%
Japan - South Korea	616,072	-72.0%	17,833,133	-31.7%
China - Thailand	186,686	-91.3%	19,544,829	-26.2%
China - Japan	271,074	-86.5%	20,492,850	-4.4%
Germany - Italy	328,447	-83.3%	15,837,349	-17.6%
China - South Korea	204,266	-89.5%	17,935,646	-15.9%
UK - Italy	688,339	-61.8%	15,471,802	-15.8%
UAE - India	718,680	-59.0%	19,134,593	-12.0%
China - Hong Kong (sar) China	135,370	-91.8%	12,304,513	-35.1%
Germany - UK	186,030	-88.5%	14,778,648	-22.5%
Spain - Italy	477,937	-70.4%	15,371,420	-15.0%
Germany - Turkey	171,608	-89.2%	16,092,220	-7.4%
Spain - France	152,368	-90.4%	13,426,722	-14.4%
UK - Ireland	343,283	-76.1%	13,653,770	-16.9%
Japan - Chinese Taipei	114,178	-91.9%	13,839,987	-14.9%
France - UK	291,779	-79.1%	12,524,992	-15.6%

Source: Schedules Analyser

KEY POINTS

- This data references the country pairs which were the Top 20 largest country pairs by sets in May 2019.
- Of the Top 20 country pairs, 14 have seen capacity fall by over 80% this May.
- Spain-UK was the largest country pair and still is but has seen scheduled seats fall by over 4 million seats.
- Canada –US, formerly the second largest country pair, has gone from capacity of 3 million seats in May 2019 to just over 100,000 in May 2020, a reduction of 96%.
- Of the 2,666 country pairs which had some scheduled capacity in May 2019, 626 have none this month.
- On a rolling 12 month basis all of the Top 20 country pairs now have negative growth.

Top 20 Country Markets by Seats



TOP TWENTY AIRLINES

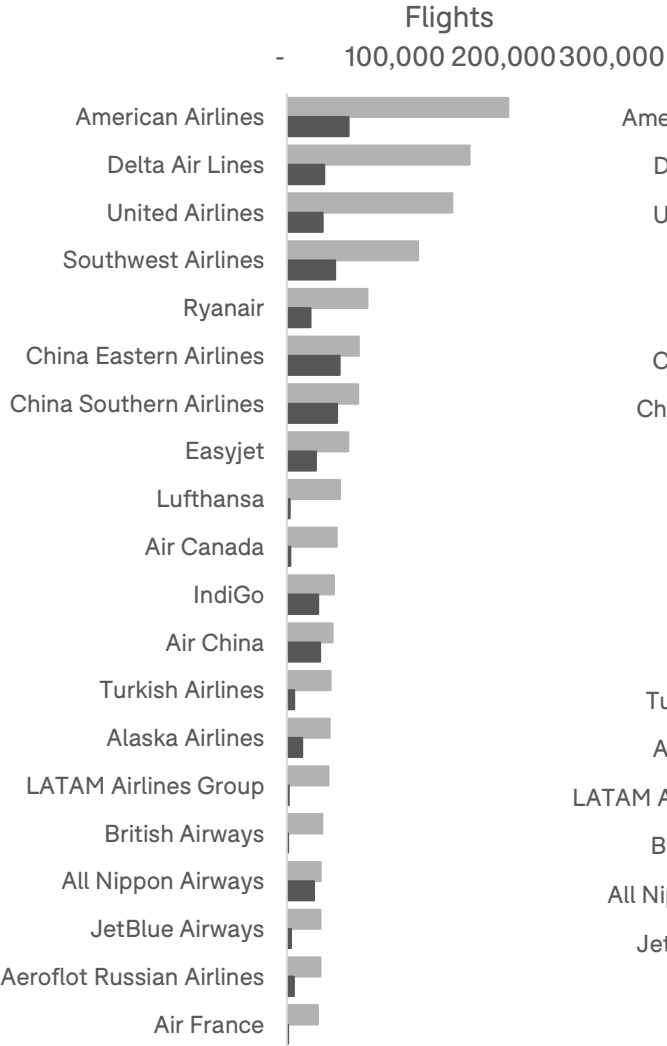
Airlines	May-20	Change	Latest 12 months	Change
American Airlines	57,050	-72.1%	2,142,267	-7.7%
Delta Air Lines	34,492	-79.6%	1,720,790	-10.6%
United Airlines	33,066	-78.4%	1,602,363	-10.4%
Southwest	44,539	-63.2%	1,295,846	-7.4%
Ryanair	21,747	-70.8%	669,965	-13.2%
China Eastern	48,731	-26.8%	682,930	-10.9%
China Southern	46,485	-29.4%	698,918	-10.7%
Easyjet	26,960	-52.6%	521,870	-13.3%
Lufthansa	2,766	-94.4%	431,064	-21.6%
Air Canada	3,245	-93.0%	466,395	-20.6%
IndiGo	28,866	-33.6%	487,584	3.6%
Air China	30,628	-27.7%	435,883	-11.4%
Turkish Airlines	6,812	-83.1%	397,174	-17.8%
Alaska Airlines	14,076	-64.4%	421,990	-7.7%
LATAM Airlines Group	1,689	-95.6%	435,008	-6.7%
British Airways	1,166	-96.4%	298,374	-18.9%
All Nippon Airways	25,007	-20.0%	352,322	-2.0%
JetBlue Airways	4,003	-87.2%	320,258	-14.4%
Aeroflot	6,503	-79.1%	312,329	-13.7%
Air France	1,266	-95.6%	309,439	-7.1%

Source: Schedules Analyser

KEY POINTS

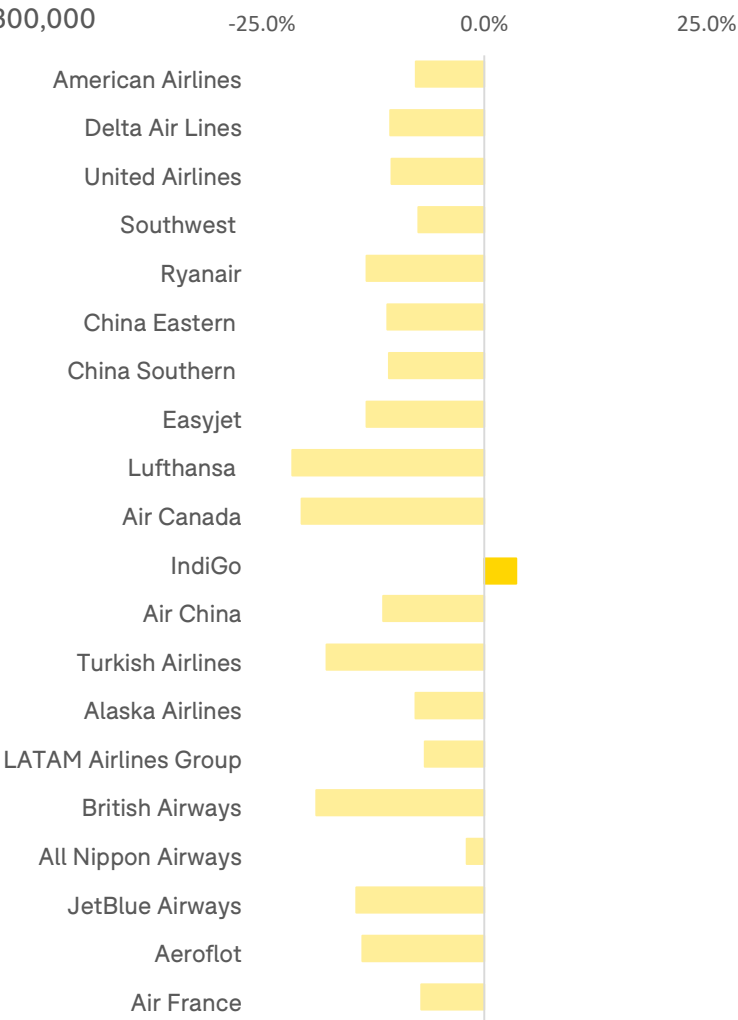
- This data references the airlines which were the Top 20 largest airlines by seats in May 2019.
- The largest airlines in the world have been the four US major carriers but this month sees all of them make substantial cuts to capacity. While American Airlines remains the largest operator globally, China Southern now makes it into second place.
- Overall, both the US and Chinese carriers appear to have made less dramatic capacity cuts but this is because a portion of the domestic capacity is still flying.
- Elsewhere, Lufthansa, Air Canada, LATAM, British Airways and Air France have now withdrawn over 90% of capacity.
- On a rolling 12 month basis, the only carrier among the Top 20 to still be operating more seats than in the preceding 12 months period is IndiGo. This will change as capacity reductions continue in India.

Top 20 Airlines by Flights Current Month



■ May-19 ■ May-20

Year on Year Change in Flights



■ Decline ■ Growth

TOP TWENTY AIRPORTS

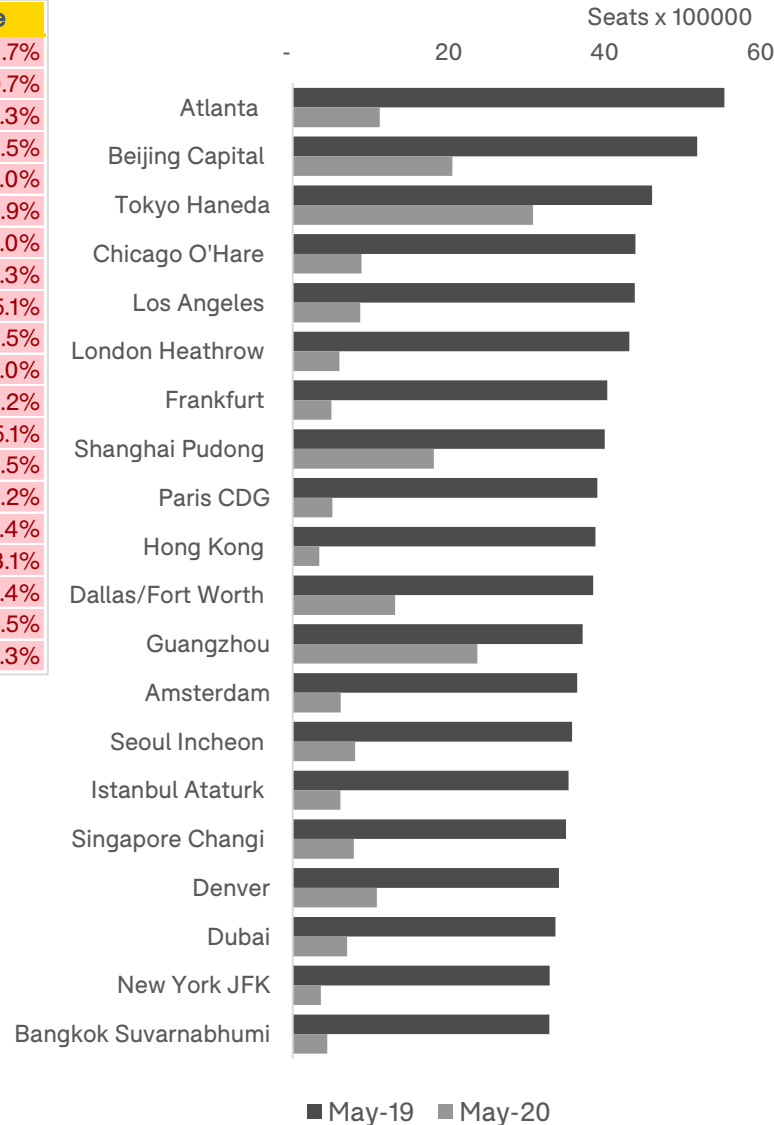
Airports	May-20	Change	Latest 12 months	Change
Atlanta	1,116,708	-79.8%	55,303,139	-11.7%
Beijing Capital	2,046,120	-60.5%	49,559,464	-20.7%
Tokyo Haneda	3,081,878	-33.1%	50,856,279	-6.3%
Chicago O'Hare	883,399	-79.9%	44,327,723	-11.5%
Los Angeles	863,676	-80.3%	44,571,100	-14.0%
London Heathrow	600,101	-86.1%	41,958,592	-15.9%
Frankfurt	497,575	-87.7%	36,815,264	-18.0%
Shanghai Pudong	1,810,229	-54.7%	37,963,845	-17.3%
Paris CDG	508,575	-87.0%	37,458,586	-15.1%
Hong Kong	339,737	-91.2%	33,382,394	-27.5%
Dallas/Fort Worth	1,311,645	-65.9%	40,169,143	-3.0%
Guangzhou	2,367,081	-36.3%	38,971,567	-10.2%
Amsterdam	614,701	-83.1%	34,756,046	-15.1%
Seoul Incheon	799,416	-77.7%	34,842,591	-16.5%
Istanbul Ataturk	611,242	-82.7%	35,393,244	-14.2%
Singapore Changi	785,112	-77.6%	34,868,736	-17.4%
Denver	1,079,210	-68.4%	36,586,010	-3.1%
Dubai	697,648	-79.3%	46,008,961	-16.4%
New York JFK	363,027	-89.0%	31,864,239	-16.5%
Bangkok Suvarnabhumi	443,792	-86.5%	33,639,623	-18.3%

Source: Schedules Analyser

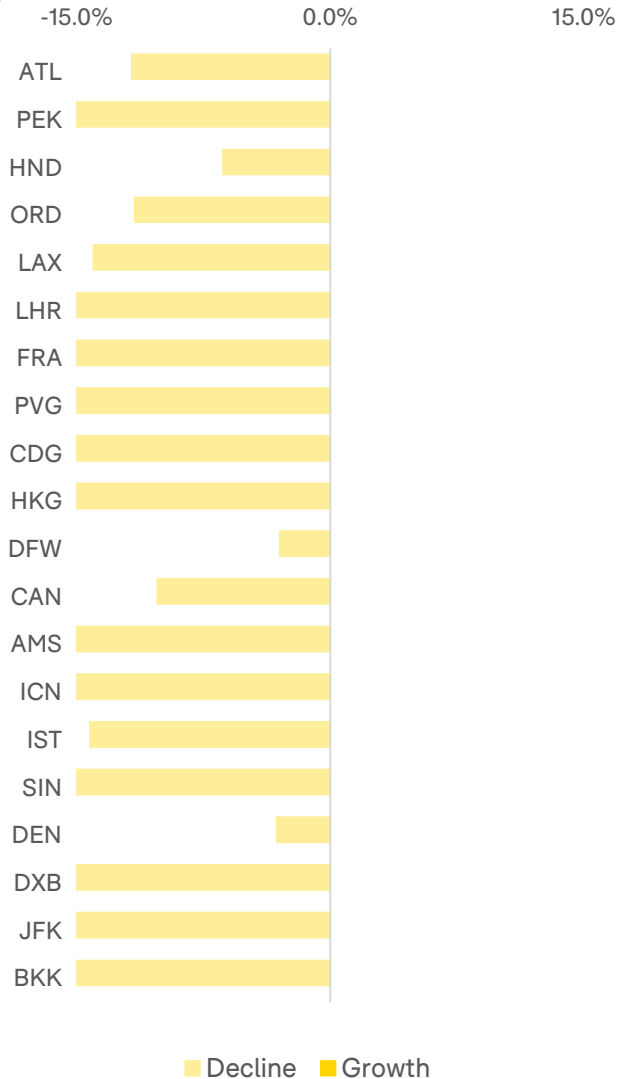
KEY POINTS

- This data references the airports which were the Top 20 largest airports by seats in May 2019.
- Atlanta, which was the largest airport in the world in terms of seats in May 2019, has seen monthly capacity fall from 5.5 million seats to 1.1 million.
- Tokyo Haneda is now the largest airport with seat volume this month of 3 million, having reduced capacity by a more modest 35%.
- While the Top 20 airports operated capacity averaging 4 million seats each in May 2019, and the smallest of the group was Bangkok Suvarnabhumi with 3.2 million seats, currently 13 of these 20 airports have fewer than 1 million seats.

Top 20 Airports by Seats Current Month

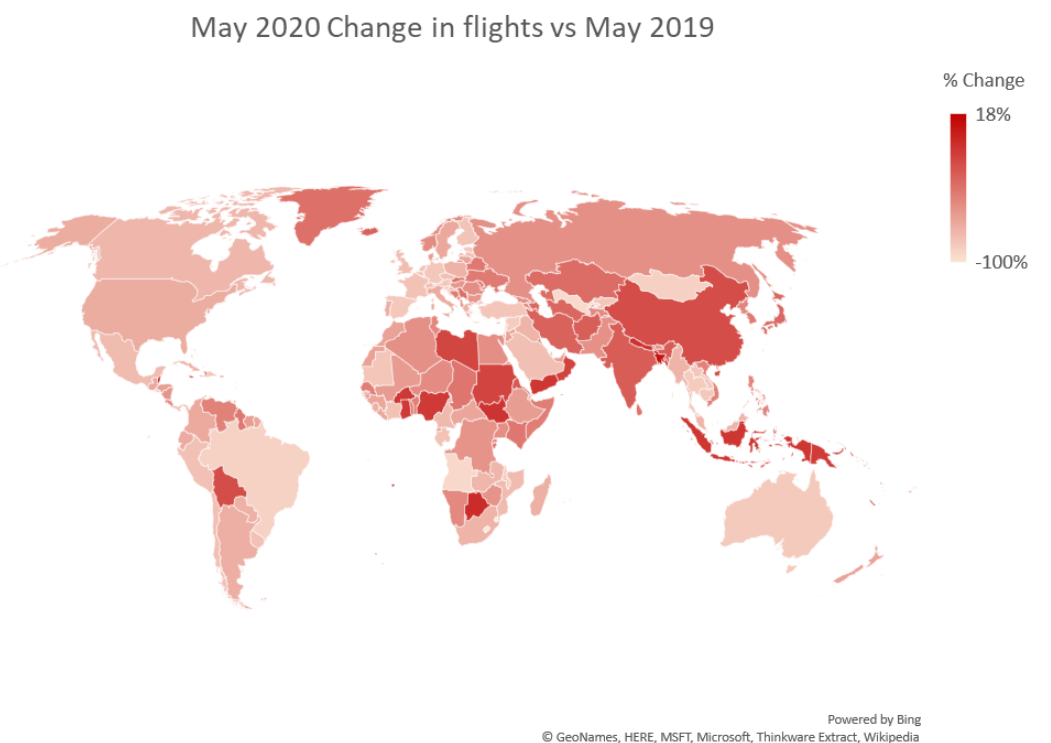


Year on Year Change in Flights



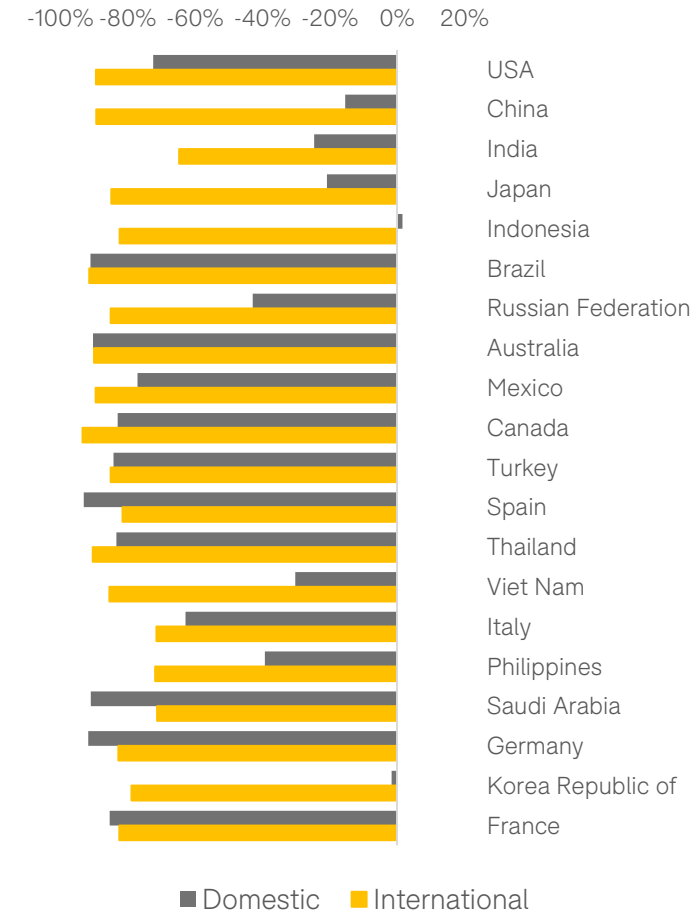
COVID19 IMPACTS

Top 20 Countries - Departing Frequencies		
Frequency Change May 2020 v's May 2019		
Country	May-20	% Change
USA	235,658	-71.0%
China	318,376	-21.8%
India	71,862	-30.1%
Japan	62,791	-36.5%
Indonesia	72,774	-10.1%
United Kingdom	20,801	-79.4%
Canada	22,821	-76.1%
Russian Federation	32,632	-56.4%
Germany	13,523	-84.6%
Spain	12,237	-85.9%
Italy	18,665	-70.2%
France	11,789	-82.1%
Brazil	6,626	-90.4%
Australia	8,662	-86.0%
Mexico	11,784	-78.7%
Turkey	8,299	-84.0%
Korea Republic of	21,069	-44.7%
Thailand	5,808	-86.4%
Viet Nam	15,376	-48.6%
Malaysia	8,703	-75.6%



Source: Schedules Analyser

Capacity change May 2020 vs May 2019



HIGHLIGHTS

- This data references the countries which were the Top 20 largest by flights in May 2019.
- The US was the largest country market in May 2019, but has fallen to second largest behind China as the different stages of the pandemic each country is in impact. The US has seen a significant amount of capacity taken out of the market this month, with 71% fewer flights than last May.
- China has seen frequency start to recover with flights down 'just' 22% this month, down from a reduction of 34% last month. This reflects the beginning of recovery in China's domestic market where frequency reductions are down by only 15% on last May. May represents an important public holiday period in China so this will be a test of consumer confidence.
- Other markets seeing a less sharp fall, or the potential beginnings of a slow recovery are South Korea, where flights are down 45% this month, compared to 53% last month. South Korea's domestic market is also recovering faster with flights down by just 2% this month.

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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