SEPTEMBER 2020

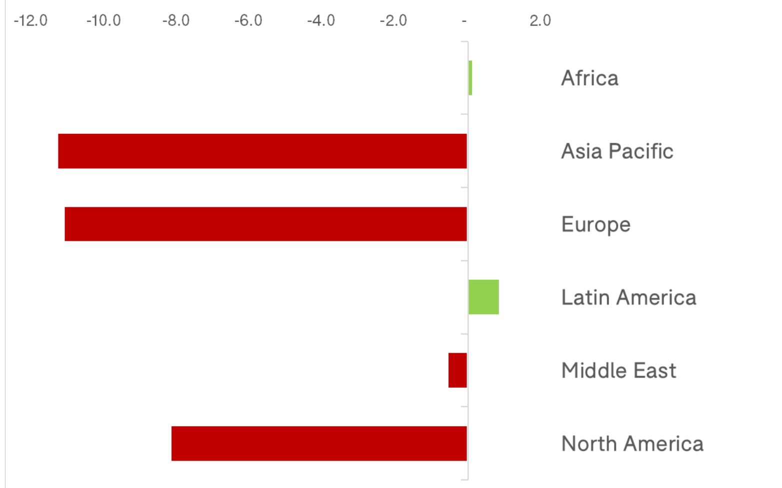
OAG FREQUENCY & CAPACITY STATISTICS

MAKE SMARTER MOVES

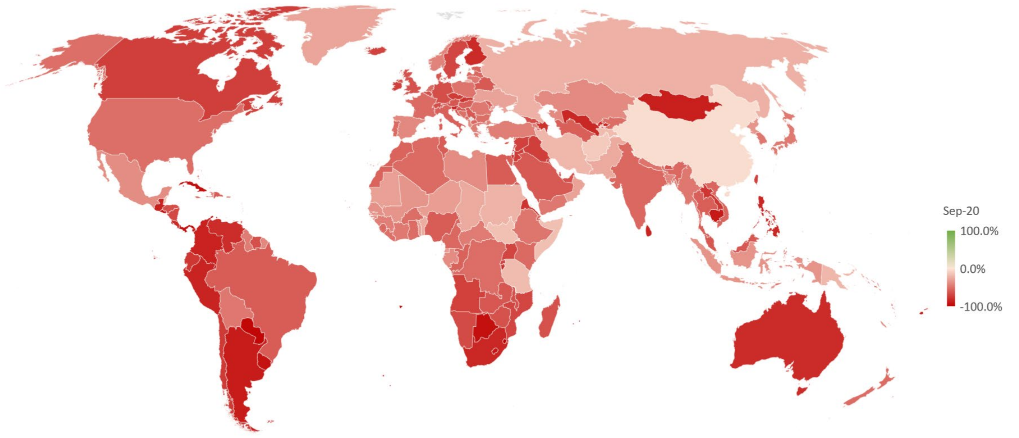
SEATS BY REGION

Region	Sep-20	Change v Sep-19 % Change	Change v Aug-20 % Change
Africa : Central/Western Africa	1,348,544	-49.1%	20.2%
Africa : Eastern Africa	1,532,376	-53.1%	4.7%
Africa : North Africa	2,208,438	-55.5%	-8.6%
Africa : Southern Africa	690,847	-79.7%	7.6%
Asia : Central Asia	823,530	-51.1%	7.7%
Asia : North East Asia	84,406,764	-20.2%	-7.4%
Asia : South Asia	9,726,193	-53.2%	-16.7%
Asia : South East Asia	17,757,815	-57.6%	-12.7%
Europe : Eastern/Central Europe	12,885,397	-40.0%	-15.9%
Europe : Western Europe	47,348,918	-58.2%	-15.5%
Latin America : Caribbean	1,381,481	-57.1%	-28.6%
Latin America : Central America	4,943,652	-47.1%	-3.8%
Latin America : Lower South America	5,316,036	-65.8%	32.5%
Latin America : Upper South America	1,433,194	-80.6%	30.2%
Middle East	7,210,752	-62.7%	-7.4%
North America	47,883,739	-53.3%	-14.6%
Southwest Pacific	3,204,924	-73.6%	-2.8%
Global	250,102,600	-48.8%	-10.8%

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



Seat Capacity September 2020 v 2019



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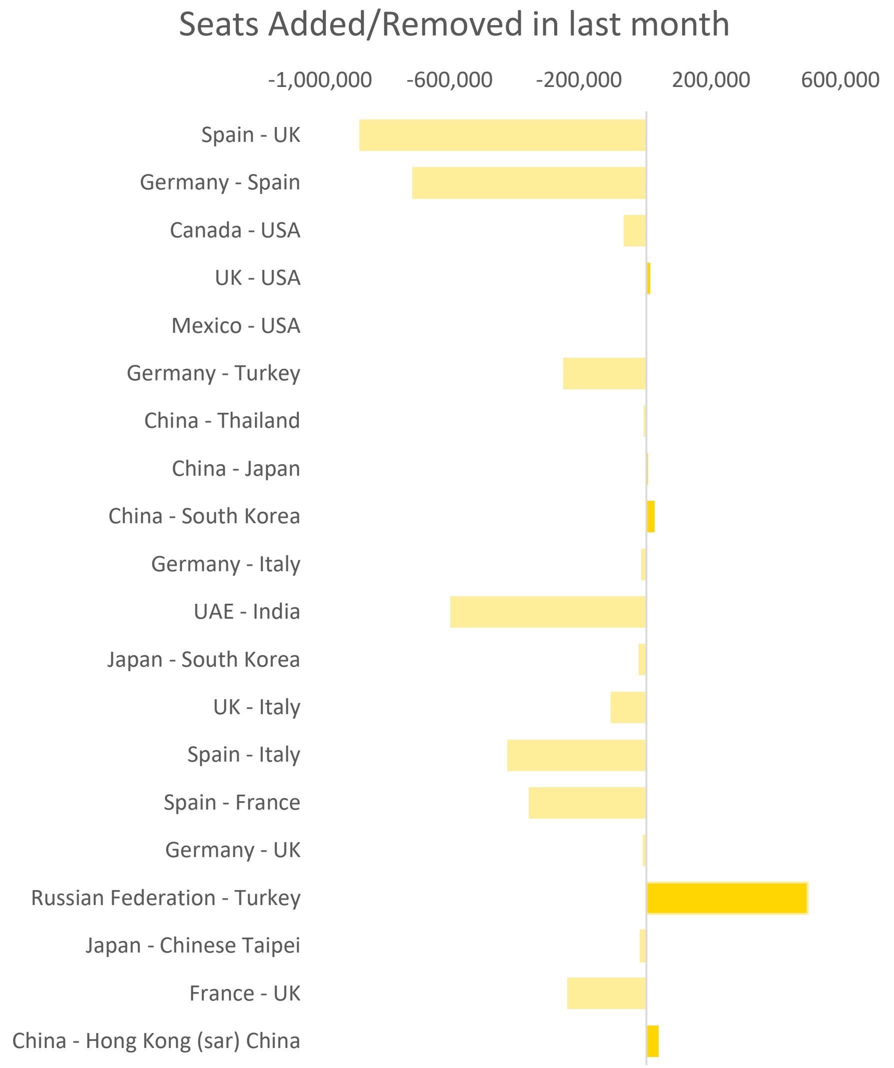
KEY POINTS

- Global capacity in September is expected to be -49% lower than last September. Global capacity has stalled at this level, and given the ongoing reductions in capacity week on week, the total picture for September is likely to be lower still by the end of the month. Carriers globally have reduced capacity by 11% on last month.
- There are pockets of growth versus last month in Africa, Central Asia and Latin America, but this growth is from a very low basis as some of these markets have been slowest to kick start recovery from very low levels. South Africa for example will see 8% more seats this month than last, but remains 80% below last year.
- Several parts of Asia are seeing capacity pull back this month compared to last month with 11.3m fewer seats in September than August. North East Asia is boosted by the recovery of China's domestic market – at least in terms of capacity - in September where there are expected to be 8% more seats than September 2019. Only China and the Russian Federation have capacity above last year's levels.
- In Europe, carriers are cutting capacity back on last month, as ongoing restrictions and quarantines occur across the region. Western Europe is now back to nearly 60% below last September, with 16% reduction on last month.
- The Caribbean has also seen capacity cut back this month with carriers reducing seats by 29% on last month, as demand is impacted by ongoing restrictions on international travel.

TOP TWENTY COUNTRY PAIRS

Country Pairs	Sep-20	Change v Sep-19	% Change	Change v Aug-20	% Change
Spain - UK	1,904,614	-63.3%		-31.8%	
Germany - Spain	1,182,292	-64.3%		-38.0%	
Canada - USA	189,483	-94.0%		-27.2%	
UK - USA	364,640	-84.7%		3.4%	
Mexico - USA	1,385,861	-41.5%		0.0%	
Germany - Turkey	892,115	-59.4%		-22.4%	
China - Thailand	190,942	-91.1%		-4.5%	
China - Japan	215,699	-89.8%		2.4%	
China - South Korea	305,862	-84.9%		9.2%	
Germany - Italy	559,496	-71.1%		-2.9%	
UAE - India	521,476	-71.6%		-53.8%	
Japan - South Korea	339,133	-81.3%		-6.7%	
UK - Italy	709,812	-60.1%		-13.5%	
Spain - Italy	521,193	-70.4%		-45.2%	
Spain - France	513,322	-68.1%		-41.5%	
Germany - UK	412,953	-73.6%		-2.5%	
Russian Federation - Turkey	1,057,205	-26.1%		89.2%	
Japan - Chinese Taipei	69,165	-95.1%		-20.4%	
France - UK	416,427	-70.2%		-37.0%	
China - Hong Kong (sar) China	164,548	-88.1%		29.3%	

Source: Schedules Analyser



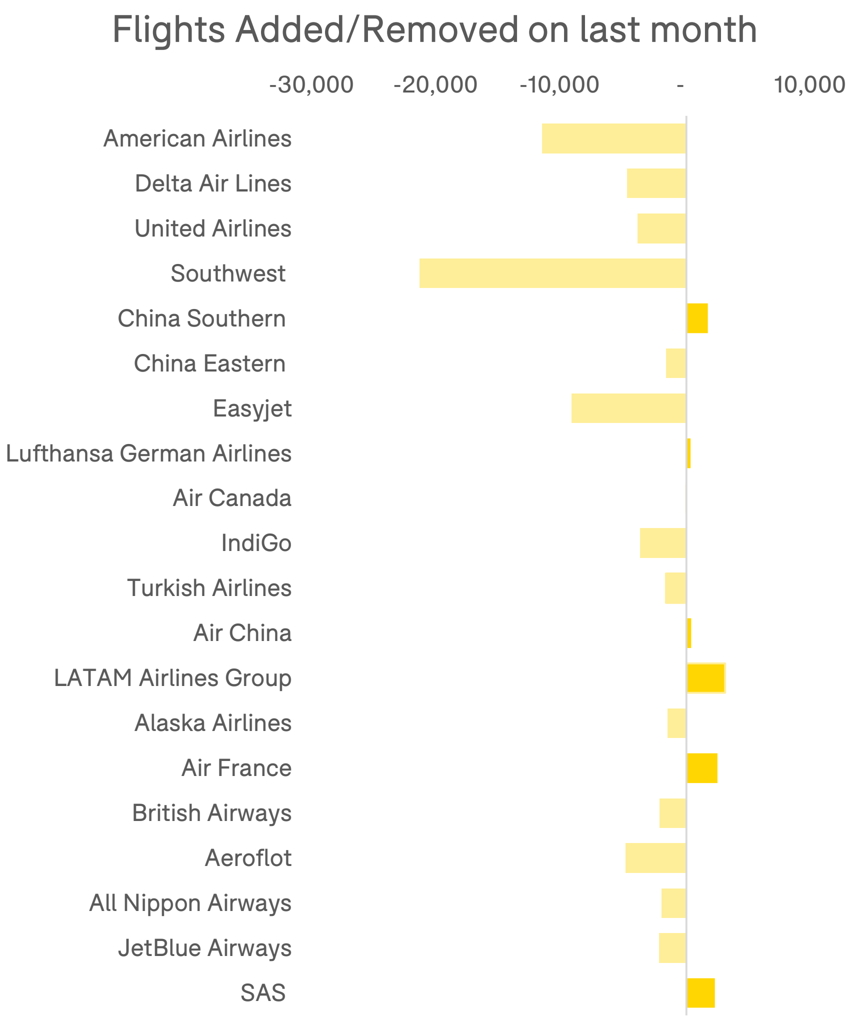
KEY POINTS

- As seen at the regional level, there is very little growth in the largest country pairs. Russia-Turkey is a notable exception, and capacity is now sitting at just over a quarter below last September's level.
- Capacity between the UAE and India has scaled back this month, with a 54% reduction in capacity on last month as Covid cases spike up again in India.
- Spain's capacity has suffered too with 2.4m seats being removed this month compared to last month to and from Germany, France, the UK and Italy as the combination of school holidays ending and ongoing travel restrictions impact demand.
- Signs of small increases in China outbound travel are emerging with capacity growth anticipated between China-Hong Kong, South Korea and Japan. To what extent this continues to grow for China's national holiday, Golden Week, which is in early October remains to be seen.

TOP TWENTY AIRLINES

Airlines	Sep-20	Change v Sep-19	% Change	Change v Aug-20	% Change
American Airlines	94,332	-51.0%		-11.0%	
Delta Air Lines	85,961	-45.9%		-5.3%	
United Airlines	65,094	-56.4%		-5.7%	
Southwest	64,039	-42.4%		-25.1%	
China Southern	63,290	-5.0%		2.8%	
China Eastern	61,383	-7.6%		-2.6%	
Easyjet	21,759	-61.7%		-29.9%	
Lufthansa German Airlines	15,226	-68.3%		2.3%	
Air Canada	10,500	-77.8%		-0.6%	
IndiGo	21,192	-51.4%		-14.9%	
Turkish Airlines	19,078	-54.8%		-7.9%	
Air China	37,939	-8.7%		1.0%	
LATAM Airlines Group	10,910	-73.6%		40.1%	
Alaska Airlines	22,921	-40.2%		-6.2%	
Air France	19,671	-42.1%		14.7%	
British Airways	6,967	-78.1%		-23.7%	
Aeroflot	15,038	-51.8%		-24.6%	
All Nippon Airways	24,837	-18.1%		-7.5%	
JetBlue Airways	8,557	-71.3%		-20.3%	
SAS	12,574	-54.6%		22.3%	

Source: Schedules Analyser



KEY POINTS

- This month sees the US carriers pulling back on flights – Southwest – who were closest to last year's level last month, have withdrawn 25% of the seats scheduled in August. JetBlue have also pared back flights with 20% fewer this month than last month. Of the US carriers in the Top 20, they remain furthest behind their 2019 position with 71% less flights.
- The LATAM group are adding back flights, as seen in the regional chart with 40% more seats than last month. In absolute terms the LATAM increase equates to just over 3,000 flights and they remain 74% down on September 2019.
- Two of Europe's biggest network carriers, Air France and SAS are both anticipating an increase in flights this month, with increase of 15% and 22% respectively on last month. Much of the Air France increase is on domestic routes, although there is some additional frequency to Germany, the Netherlands and Switzerland. For SAS there are increases in frequency within Norway and Sweden, with some additional increases between the Scandinavian countries.
- easyJet have reduced flights this month, due to ongoing challenges with quarantine and restrictions on travel. They will operate 30% less flights this month than last month and remain 62% behind last year's flight level.

*Due to issues with the volatility of data, Ryanair has been excluded from the Top 20 this month

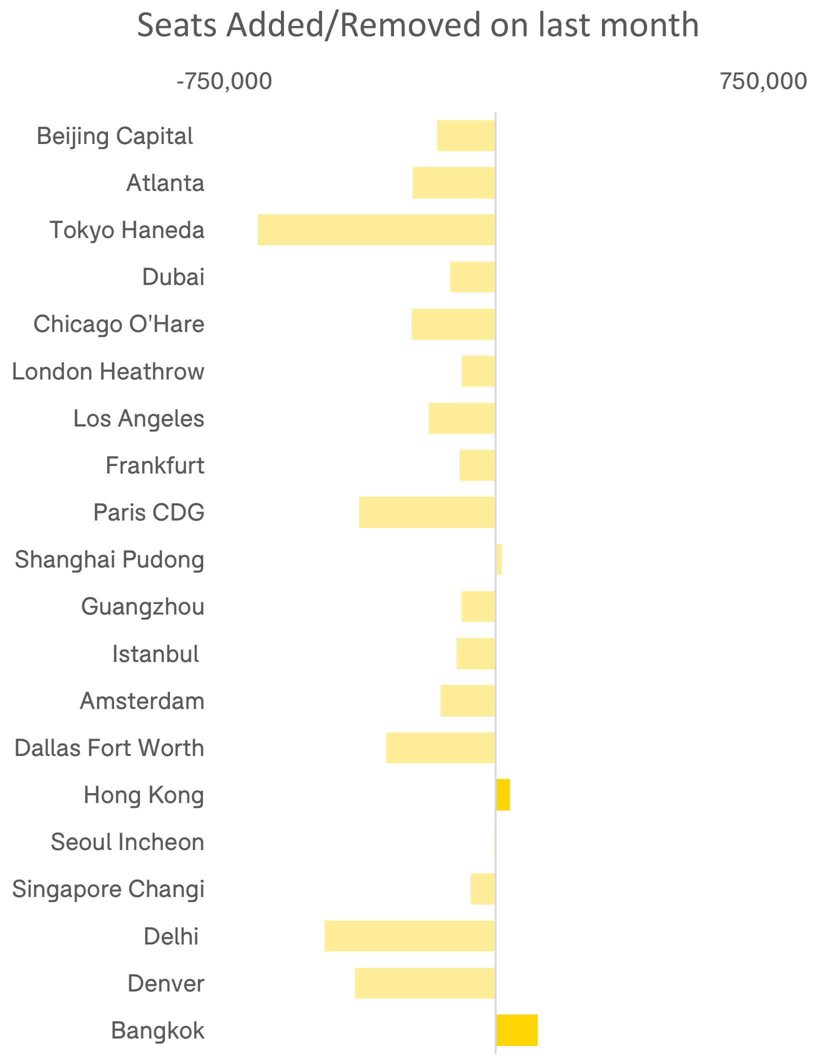
TOP TWENTY AIRPORTS

Airports	Sep-20	Change v Sep-19	% Change	Change v Aug-20	% Change
Beijing Capital	2,823,434	-45.8%		-5.5%	
Atlanta	2,996,970	-41.9%		-7.2%	
Tokyo Haneda	2,603,910	-43.1%		-20.4%	
Dubai	1,280,884	-71.9%		-9.0%	
Chicago O'Hare	1,876,967	-56.5%		-11.1%	
London Heathrow	1,351,384	-68.4%		-6.6%	
Los Angeles	1,593,044	-62.1%		-10.5%	
Frankfurt	1,283,749	-68.9%		-7.3%	
Paris CDG	1,534,388	-61.8%		-19.9%	
Shanghai Pudong	2,655,651	-32.3%		0.7%	
Guangzhou	3,335,390	-11.0%		-2.8%	
Istanbul	1,418,547	-62.1%		-7.2%	
Amsterdam	1,722,357	-53.3%		-8.2%	
Dallas Fort Worth	2,288,957	-37.9%		-11.8%	
Hong Kong	438,036	-87.8%		9.9%	
Seoul Incheon	749,884	-78.7%		-0.5%	
Singapore Changi	287,014	-91.7%		-19.6%	
Delhi	1,535,903	-55.5%		-23.7%	
Denver	2,228,117	-35.3%		-15.0%	
Bangkok	803,734	-75.5%		16.9%	

Source: Schedules Analyser

KEY POINTS

- Only two of the largest airports in the world will see capacity added this month compared to last month. These two are Hong Kong and Bangkok. Both airports are still considerably behind last year's capacity level.
- At Hong Kong, just 12% of last year's capacity will operate this September and at Bangkok, 25% will operate.
- Many will see capacity fall on last month, notably Singapore, Paris, Tokyo and Delhi which all see reductions of around 20% on August.
- Based on September 2020 data, Guangzhou is the largest airport in the world this month with 3.3m seats and a position just 11% below last year's capacity level. This is partly as Beijing's new airport has impacted on the year on year position for Beijing Capital airport, but is not yet large enough to make it into the Top 20.



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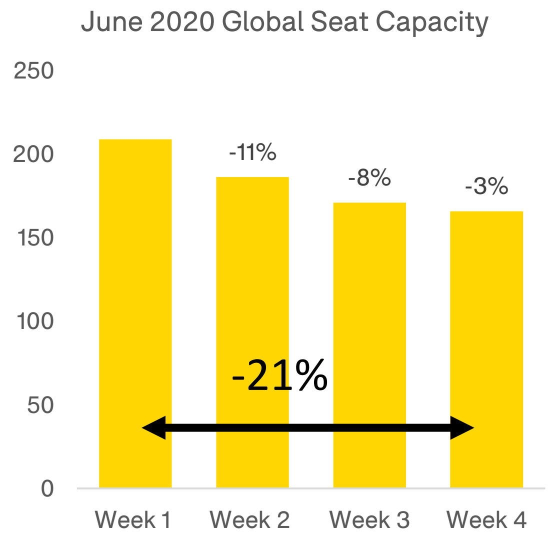
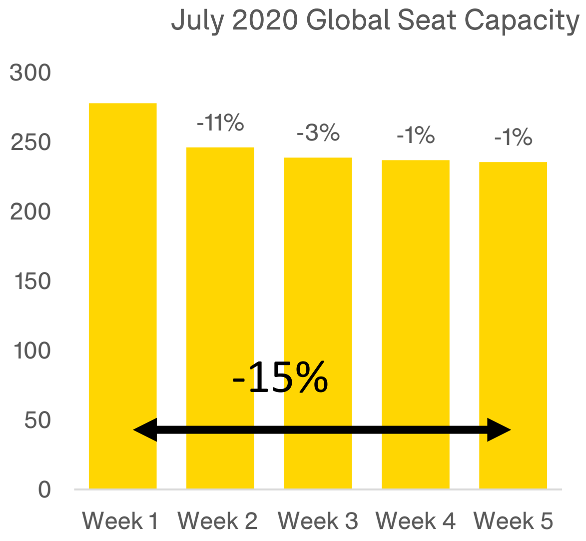
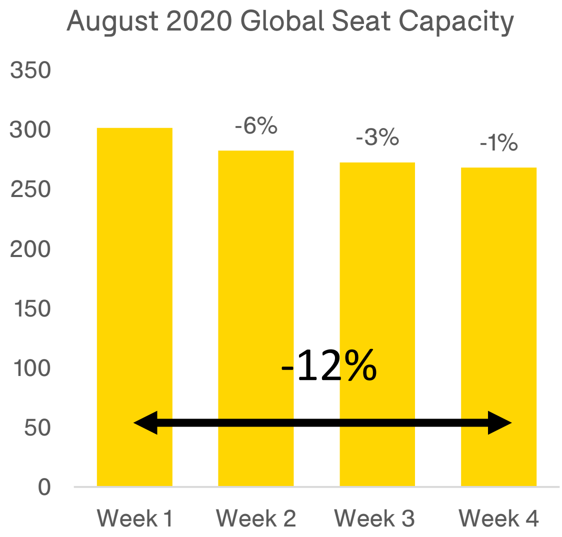
COVID19 IMPACTS

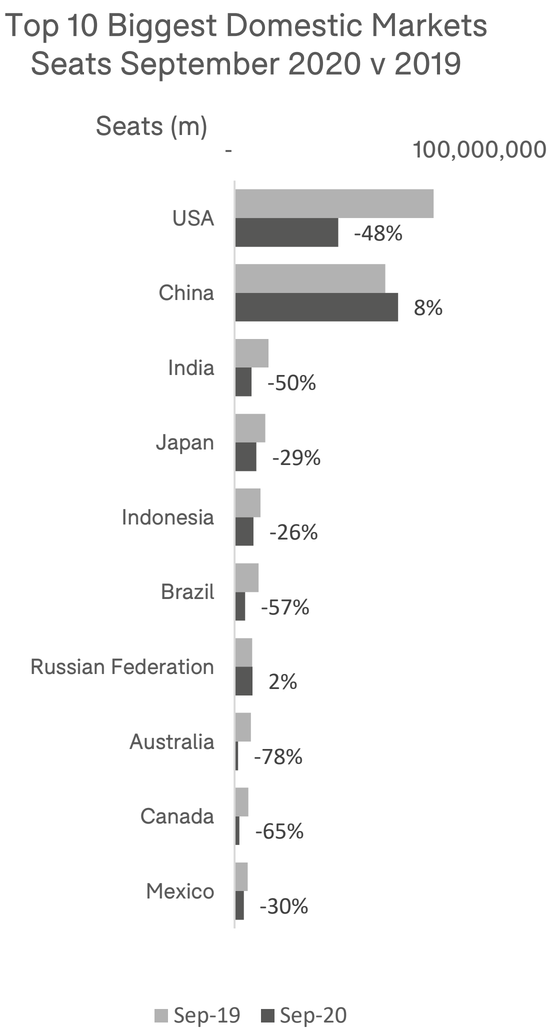
Each week in the month, capacity for the full month was revised downwards as carriers adjusted capacity throughout the month







Source: Schedules Analyser



KEY POINTS

- Looking at OAG’s historical snapshot data for capacity we can see variability in schedules data throughout the month as airlines continue to attempt to match capacity to demand in these uncertain times. We may have seen this variability start to decrease with the position for July being revised down by 15% over the month, a reduction from previous months and now August is down 12% between the beginning and end of the month.
- China’s domestic market will be 8% higher than September 2019 this month. The Russian Federation is also expected to be slightly above last September with 2% more seats. All of the other Top 20 countries are still considerably below last year’s capacity level. Australia is farthest behind with seats at 78% below last year.

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. Data is unadjusted for the leap year effect.   We have removed our comparison for the rolling 12 months temporarily.

- 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.
  3. **Top 20 Airlines** are the 20 largest global airlines by flights based on the equivalent month last year.
  4. **Top 20 Airports** are the 20 largest airports by capacity based on the equivalent month last year.
  5. This month we include 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 September 2020 is based on OAG Schedules data as of 7th September 2020

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