

MARCH 2020

OAG®

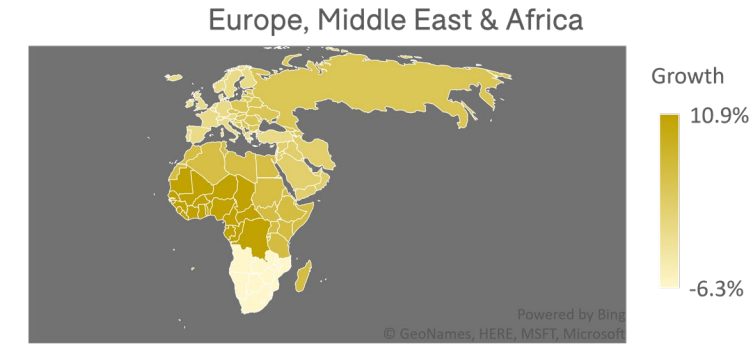
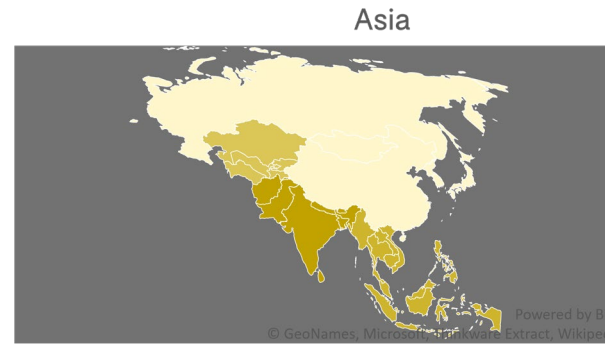
# OAG FREQUENCY & CAPACITY STATISTICS

MAKE SMARTER MOVES

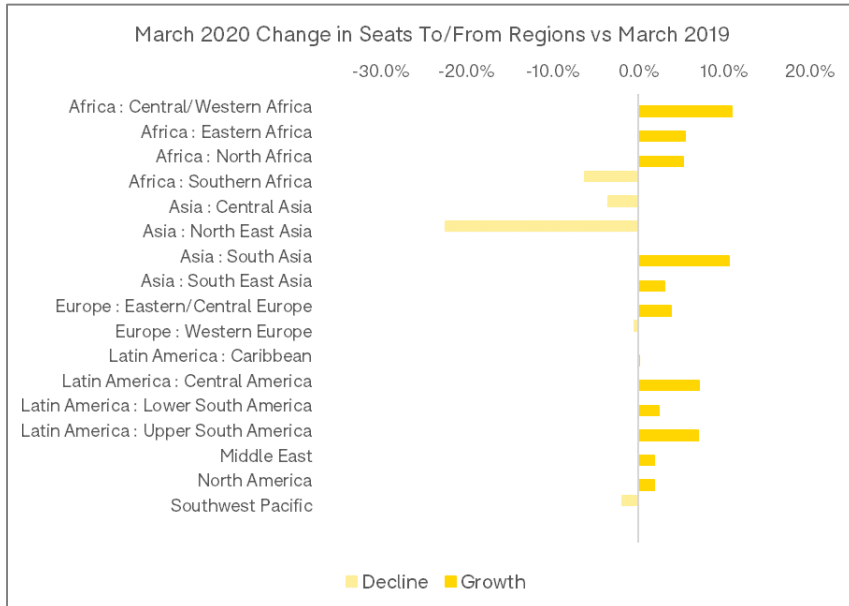
# SEATS BY REGION

Region	Mar-20	Change	Latest 12 months	Change
Africa : Central/Western Africa	2,874,863	10.9%	32,471,298	5.1%
Africa : Eastern Africa	3,331,149	5.4%	39,196,817	3.4%
Africa : North Africa	4,734,932	5.2%	57,877,828	5.8%
Africa : Southern Africa	3,347,789	-6.3%	40,891,958	2.3%
Asia : Central Asia	1,532,628	-3.6%	19,408,966	4.3%
Asia : North East Asia	79,605,313	-22.5%	1,211,927,164	0.2%
Asia : South Asia	23,290,458	10.5%	259,531,205	2.6%
Asia : South East Asia	45,126,023	3.0%	529,966,710	1.8%
Europe : Eastern/Central Europe	17,052,499	3.7%	229,114,094	5.4%
Europe : Western Europe	90,656,220	-0.5%	1,203,541,154	1.1%
Latin America : Caribbean	4,582,307	0.1%	48,310,389	3.0%
Latin America : Central America	11,038,285	7.0%	124,055,754	7.3%
Latin America : Lower South America	16,541,823	2.3%	190,978,297	-0.7%
Latin America : Upper South America	7,734,178	6.9%	89,888,137	6.0%
Middle East	19,772,126	1.8%	233,610,835	1.0%
North America	108,396,740	1.8%	1,261,578,351	2.9%
Southwest Pacific	12,116,637	-1.9%	146,818,296	0.3%
Global	451,733,970	-3.3%	5,719,167,253	1.8%

Source: Schedules Analyser



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



## HIGHLIGHTS

- As expected, capacity to, from and within North East Asia is significantly down this month with the ongoing Coronavirus epidemic. There are 22.5% fewer seats than last year this month
- Southern Africa capacity is down due to a 24% reduction in seats by South African Airways following their recent restructuring
- The Coronavirus impact is also evident in the Southwest Pacific region with reductions in capacity between Australia and New Zealand and China and Hong Kong amounting to nearly 0.6m fewer seats. This is likely to continue into April and beyond
- Other global regions are starting to see an impact on capacity too with Western Europe facing a drop of 0.5% this month in seats, primarily with reductions in China capacity amounting to 900,000 fewer seats this month compared to last March. Europe is also experiencing some capacity reductions in the German, Italian and Turkish domestic markets, collectively amounting to 1.1m seats.

# TOP TWENTY COUNTRY PAIRS

Country Pairs	Mar-20	Change	Latest 12 months	Change
Canada - USA	3,549,482	-3.2%	39,226,984	-0.7%
Mexico - USA	3,544,763	-0.6%	37,238,501	-2.6%
Spain - UK	3,025,260	-1.8%	48,948,558	1.3%
Germany - Spain	2,053,475	-8.0%	31,734,499	-8.7%
UK - USA	2,053,091	-0.9%	26,702,171	-1.3%
UAE - India	1,928,673	7.7%	21,984,511	-0.3%
Germany - UK	1,531,111	-8.1%	18,124,360	-5.7%
UK - Italy	1,403,525	4.2%	18,608,091	2.0%
Germany - Italy	1,401,925	-2.5%	19,820,901	4.9%
UK - Ireland	1,389,341	-0.4%	16,379,719	0.0%
Japan - South Korea	1,347,643	-40.7%	21,825,570	-15.6%
Spain - Italy	1,338,313	0.8%	18,477,693	2.9%
France - UK	1,206,011	3.2%	15,140,737	2.6%
Spain - France	1,181,929	7.4%	16,512,299	6.3%
UK - Netherlands	1,169,857	-1.0%	13,429,841	1.4%
UAE - Saudi Arabia	1,120,208	-0.7%	13,067,783	-2.4%
Indonesia - Malaysia	1,111,035	1.0%	13,273,204	4.9%
Japan - Chinese Taipei	1,106,225	-22.0%	16,694,169	3.3%
France - Italy	1,075,097	6.5%	14,243,868	6.1%
Germany - Turkey	1,073,587	10.0%	19,195,565	12.3%

Source: Schedules Analyser

## HIGHLIGHTS

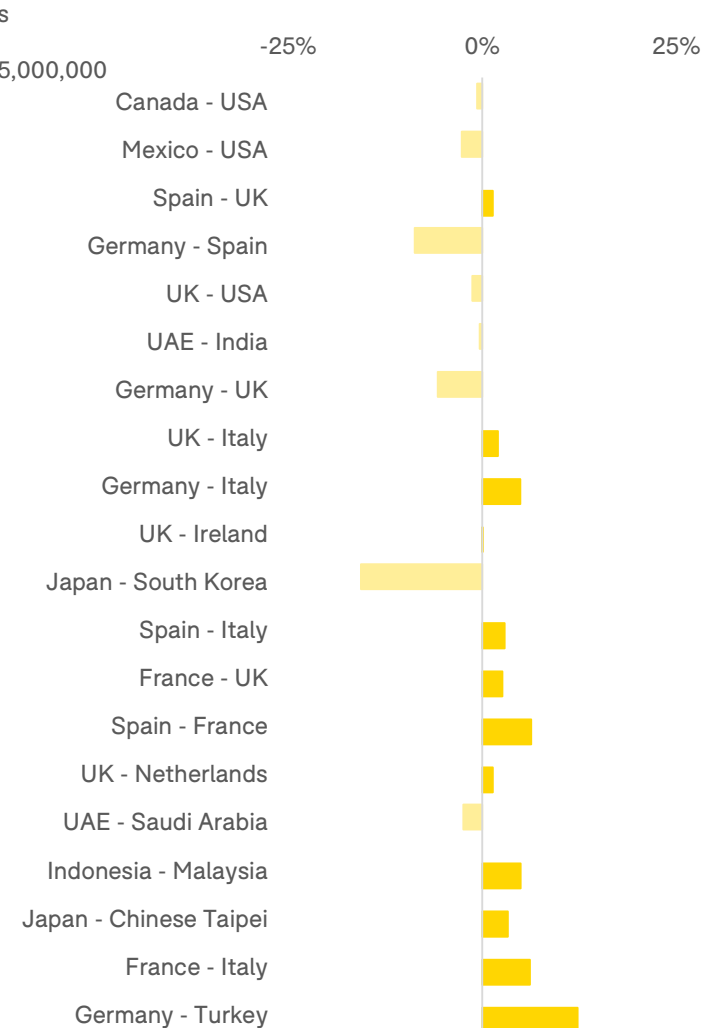
- 12 of the Top 20 largest international country pairs will see capacity reductions this month. Some of this maybe due to timing of the winter and summer season schedule changes but this is not likely to be significant. Only 2 of the 12 country pairs are in Asia or start or end in Asia but these are the markets with the largest reductions. Japan – South Korea has just over 0.9m fewer seats this March as both countries experience an increase in Coronavirus cases, in addition to the ongoing trade dispute, and Japan –Chinese Taipei has seen growth reverse considerably with 0.3m fewer seats this month.
- Other significant changes in capacity include Germany-Spain with 0.17m fewer seats and Germany-UK with 0.13m fewer seats. Some of the reductions are ongoing impact from the collapse of Germania. Ryanair are also reducing capacity in these markets and there are significant reductions from Eurowings and Flybe in Germany-UK capacity.
- There are some pockets of strong growth, with the UAE-India seeing increased capacity from Air India, Indigo and Go Air this month. Germany – Turkey is also seeing growth with Corendon more than doubling capacity over last year.

Top 20 Country Markets by Seats  
Current Month



■ Mar-19 ■ Mar-20

Year on Year Change in Seats



■ Decline ■ Growth

# TOP TWENTY AIRLINES

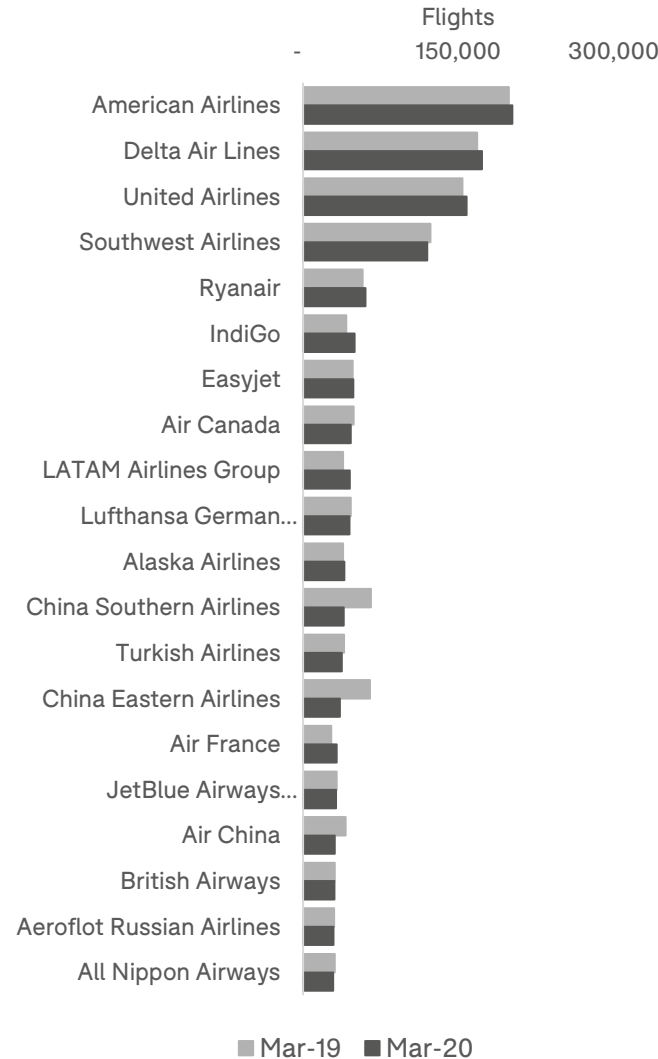
Airlines	Mar-20	Change	Latest 12 months	Change
American Airlines	202,029	1.6%	2,373,200	2.8%
Delta Air Lines	172,689	2.6%	1,976,840	3.1%
United Airlines	157,812	2.4%	1,824,554	2.6%
Southwest	119,842	-2.5%	1,395,006	-0.2%
Ryanair	60,268	4.6%	808,712	6.0%
IndiGo	49,722	19.2%	542,012	19.8%
Easyjet	48,700	1.6%	609,412	2.5%
Air Canada	46,183	-5.8%	556,933	-6.0%
LATAM Airlines Group	45,321	17.6%	509,697	15.8%
Lufthansa	44,829	-2.7%	537,969	-2.1%
Alaska Airlines	39,996	3.4%	473,655	4.8%
China Southern	39,349	-40.0%	749,434	-3.9%
Turkish Airlines	37,509	-5.2%	476,665	-2.1%
China Eastern	35,538	-45.0%	737,778	-2.8%
Air France	32,439	18.9%	368,958	10.6%
JetBlue Airways	31,841	-1.9%	371,761	-0.7%
Air China	30,553	-25.7%	471,761	-3.7%
British Airways	30,248	-1.1%	366,979	0.0%
Aeroflot	29,284	-2.1%	362,999	1.5%
All Nippon Airways	28,979	-5.0%	366,498	2.5%

Source: Schedules Analyser

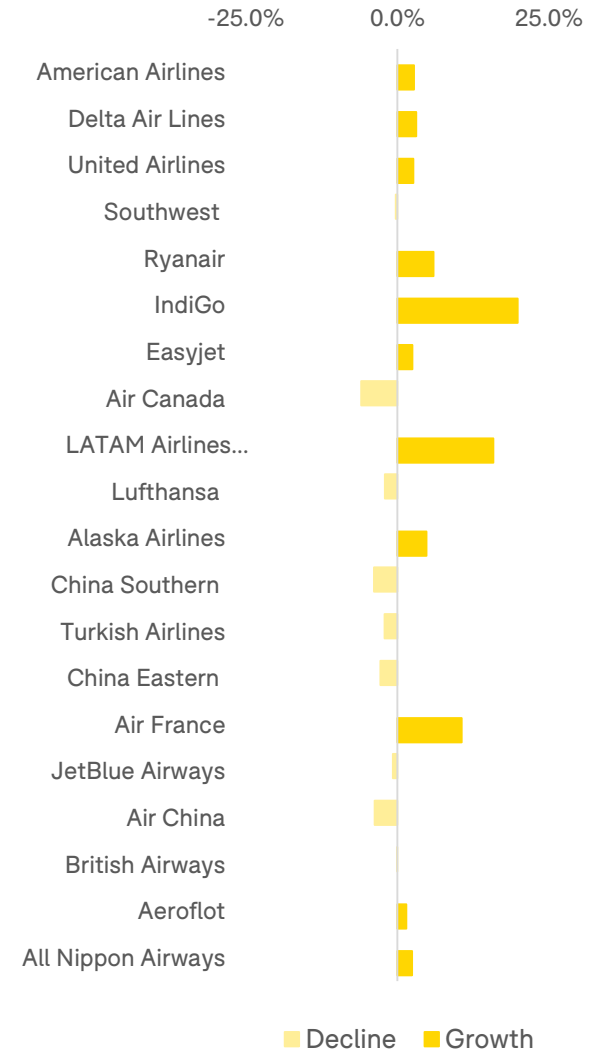
## HIGHLIGHTS

- The impact of Coronavirus is evident here with 11 of the Top 20 largest airlines having reduced flights this month. 9 of these are directly related to China service suspensions and we expect these to continue and spread beyond Asia in coming months.
- Some airlines continue to record strong growth in flights this month and it is no coincidence that these carriers have limited Asian networks. The LATAM Airlines Group has no Asian routes, operating only into Australia and New Zealand whilst IndiGo only operated 3 China services in January 2020 and has since suspended these.
- Air France appears to have grown flights by 19% in March, however this includes operations that in March 2019 were flown under the HOP! brand which appeared under a separate airline code. Looking at the combined picture shows that overall Air France/HOP! position for flights is a 4% reduction in March 2020 versus March 2019.
- The US big 3 legacy carriers (American, Delta Air Lines, United) all expect some growth in flights this month, although their international operations are down, whilst Southwest are seeing flights contract in both domestic and international markets. Jetblue has reduced international flights by 14% right across their Mexico and Caribbean operations.

Top 20 Airlines by Flights Current Month



Year on Year Change in Flights





# TOP TWENTY AIRPORTS

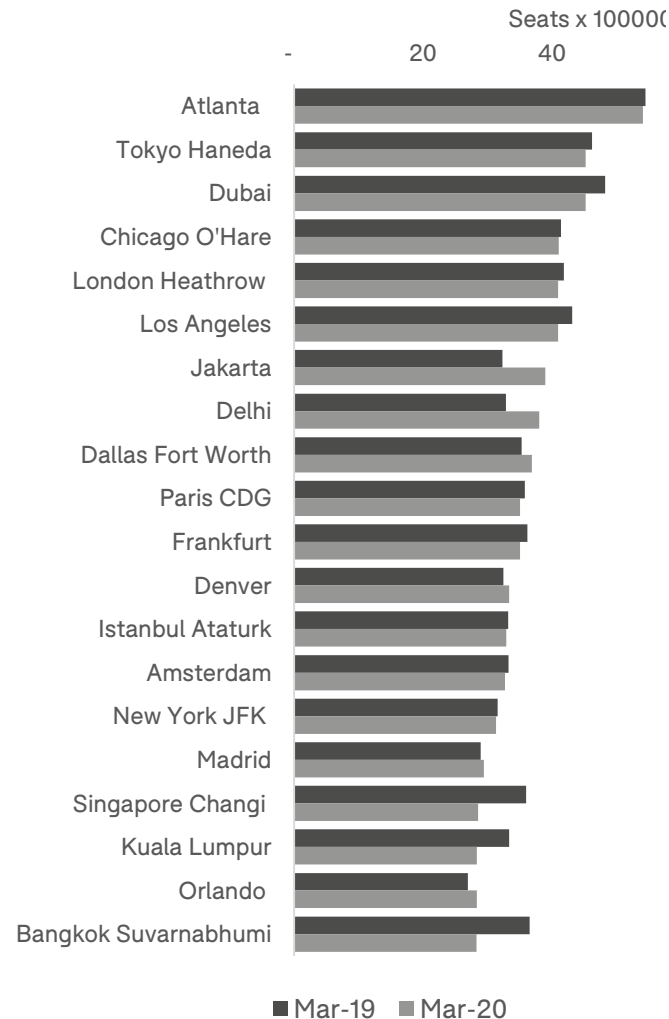
Airports	Mar-20	Change	Latest 12 months	Change
Atlanta	5,405,386	-0.7%	63,494,676	1.8%
Tokyo Haneda	4,518,229	-2.1%	54,922,985	1.7%
Dubai	4,517,516	-6.2%	53,470,362	-6.3%
Chicago O'Hare	4,100,428	-0.8%	50,479,143	1.5%
London Heathrow	4,090,522	-2.1%	50,226,509	0.7%
Los Angeles	4,089,889	-5.1%	51,142,247	-1.7%
Jakarta	3,893,006	20.6%	41,282,475	-5.3%
Delhi	3,795,925	15.6%	42,106,427	3.5%
Dallas Fort Worth	3,683,768	4.5%	44,323,020	8.7%
Paris Charles de Gaulle	3,501,646	-2.0%	45,045,650	2.6%
Frankfurt	3,500,880	-3.1%	44,998,530	0.3%
Denver	3,330,899	2.8%	40,295,580	8.1%
Istanbul Ataturk	3,286,186	-1.0%	42,344,354	1.7%
Amsterdam	3,269,077	-1.6%	41,394,327	1.3%
New York JFK	3,125,879	-0.9%	37,789,582	-0.6%
Madrid	2,939,623	1.7%	36,594,735	4.6%
Singapore Changi	2,852,728	-20.7%	41,654,486	-1.2%
Kuala Lumpur	2,830,774	-15.1%	39,296,229	1.8%
Orlando	2,829,142	5.1%	29,510,075	5.9%
Bangkok Suvarnabhumi	2,824,708	-22.6%	40,093,157	-2.8%

## HIGHLIGHTS

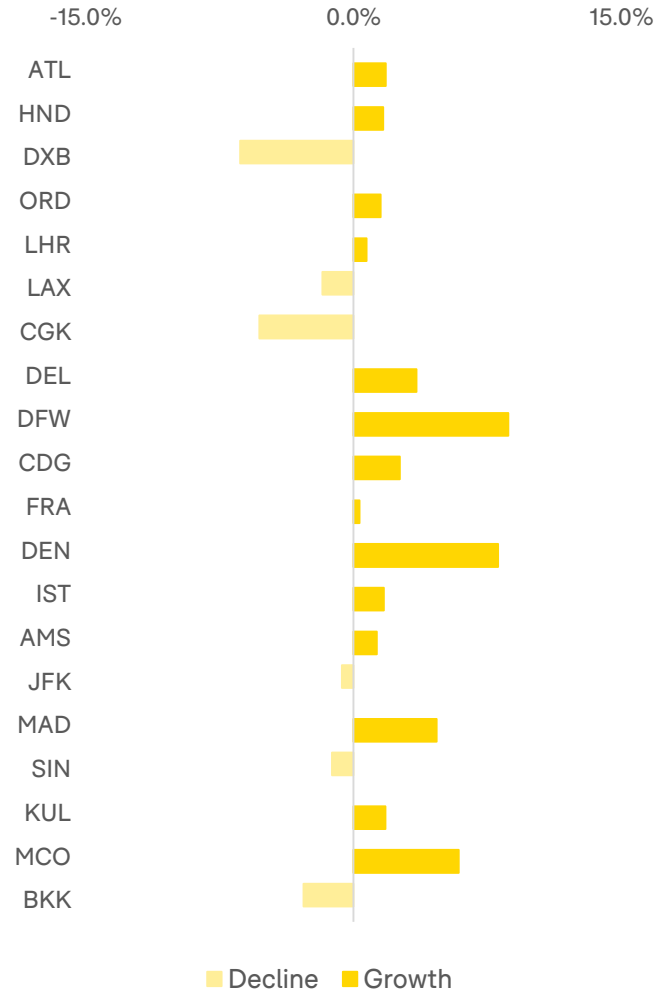
- 14 of the Top 20 largest global airports have seen capacity fall this month compared to last March. These reductions are mostly as a result of capacity reductions following suspension of direct China services. Some of the worst affected are Los Angeles, where capacity is down by 5% and Frankfurt which is down by 3%. 65% of the capacity decline at Los Angeles is down to the drop in China and Hong Kong routes.
- Beijing, Guangzhou, Shanghai Pudong and Seoul Incheon have dropped out of the Top 20 this month due to capacity reductions resulting from the Coronavirus epidemic. There are also significant capacity reductions at some of Asia's other hubs – namely Singapore Changi which has seen seats fall by 20.7%, Bangkok Suvarnabhumi by 22.6% and Kuala Lumpur by 15.5% as carriers suspend flights to China and other affected countries.
- Growth remains strong at Delhi and Jakarta, in part as these countries remain relatively unaffected by Coronavirus as yet. Almost all of the growth at Jakarta is in the Indonesian domestic market where there are 1.5m more seats this March than last year.

Source: Schedules Analyser

### Top 20 Airports by Seats Current Month



### Year on Year Change in 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 in the current month. 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 in the current month. Flights for the rolling 12 months are then included for those airlines.
  4. **Top 20 Airports** are the 20 largest airports by capacity in the current month. Capacity for the rolling 12 months is then included for those airports.

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