

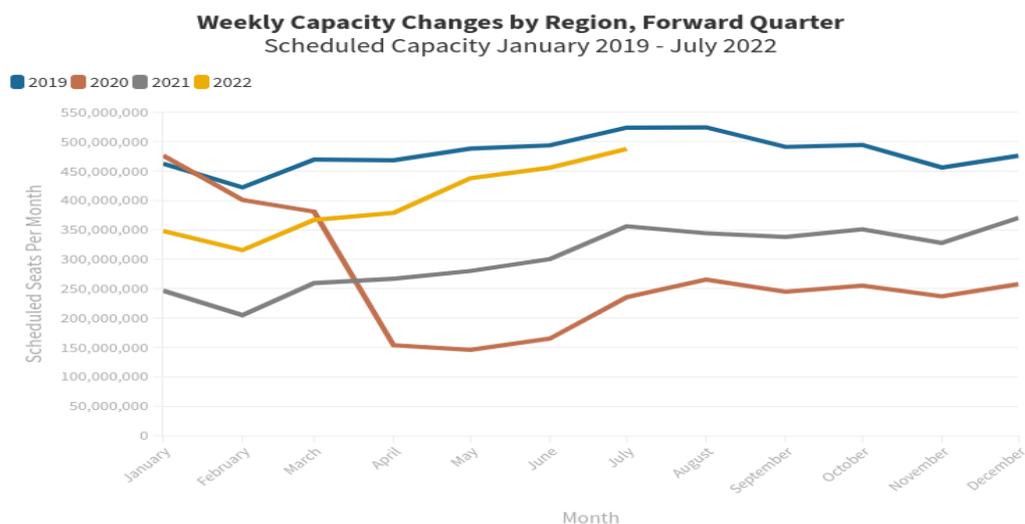
# Positive Developments for the Aviation Industry & Global Airline Capacity Edges Closer to 90 Million

Source : OAG, 19<sup>th</sup> April 2022

Last week we reported on a **challenging week for the aviation industry** as resource shortages impacted travel. However (despite what the tabloid media will have you believe) it was a calm week for global aviation, yes there were a few queues at security and some flights were cancelled around the world, but *thousands* of flights were not cancelled and only on a few occasions did security queues stretch to hundreds of yards. Global airline capacity has held strong this week at 85.7 million, slightly up on last week despite the challenges of lockdowns being faced in China.

## Forward-Looking Airline Capacity

Forward-looking airline capacity over the next three months continues to be shaved partly because of airlines impacted by continual lockdowns in some markets and by airlines wisely scaling back some capacity as resourcing proves challenging. Reductions in capacity, especially in Western Europe, and strong demand will inevitably lead to even higher **airfares** and perhaps margins for the airlines which after two years will be a welcome development (says someone who booked their flights in January!). At the moment July's capacity is standing at 93% of 2019 levels and although it will inevitably fall back it should be around 85% of where we were three years ago which will be a remarkable turnaround in just over a year as some of the later data highlights.



Source: [OAG](#)

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## Airline Capacity by Region

### Top 20 Country Markets

With only a small percentage change in the weekly totals there is little movement in the top twenty country markets but as always, a slight shifting of places. Indonesia creeps above Italy into eighth position and France moves ahead of Brazil which has taken a near 6% hit on capacity this week. Both Spain and the United Kingdom report slight reductions in capacity but just to put that in context, UK airline capacity is nearly seven times higher than this week last year which makes the successful handling of most flights a remarkable achievement in a market of scarce resources.

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Only two of the top twenty country markets are now operating with less capacity than this time last year, China which we have discussed before, and Russia where despite some major airlines still operating international services capacity is down 14% or around 250,000 seats a week.

**Scheduled Capacity, Top 20 Country Markets**

Country	13-Apr-20	12-Apr-21	11-Apr-22	18-Apr-22	% Change Week-on-Week	% Change Vs w/c 13 April 2019	% Change Vs w/c 12 April 2022
USA	8,223,770	14,999,834	20,152,978	20,078,471	-0.4%	144.2%	33.9%
China	8,663,628	16,646,258	9,860,184	9,738,592	-1.2%	12.4%	-41.5%
India	1,672,528	3,217,377	4,161,087	4,239,588	1.9%	153.5%	31.8%
Spain	172,532	743,788	3,003,126	2,976,134	-0.9%	1625.0%	300.1%
United Kingdom	250,992	351,223	2,808,584	2,781,819	-1.0%	1008.3%	692.0%
Japan	2,093,946	1,989,537	2,552,385	2,573,004	0.8%	22.9%	29.3%
Germany	212,872	572,141	2,134,074	2,193,257	2.8%	930.3%	283.3%
Indonesia	2,103,649	1,939,242	2,105,328	2,177,551	3.4%	3.5%	12.3%
Italy	184,800	525,333	2,147,665	2,167,539	0.9%	1072.9%	312.6%
Mexico	693,550	1,440,445	1,992,590	2,040,329	2.4%	194.2%	41.6%
France	121,240	595,954	1,935,187	1,978,553	2.2%	1531.9%	232.0%
Brazil	183,161	962,832	2,033,493	1,916,233	-5.8%	946.2%	99.0%
Turkey	55,742	1,140,090	1,712,409	1,749,406	2.2%	3038.4%	53.4%
Australia	171,228	1,312,035	1,714,672	1,744,255	1.7%	918.7%	32.9%
Russian Federation	827,553	1,804,399	1,483,719	1,543,679	4.0%	86.5%	-14.4%
Canada	313,853	347,767	1,347,534	1,355,323	0.6%	331.8%	289.7%
Viet Nam	261,912	1,272,049	1,138,779	1,162,556	2.1%	343.9%	-8.6%
Saudi Arabia	695,040	730,999	1,130,711	1,151,545	1.8%	65.7%	57.5%
United Arab Emirates	187,575	638,682	1,105,940	1,109,037	0.3%	491.2%	73.6%
Colombia	176,679	590,752	1,013,131	989,976	-2.3%	460.3%	67.6%

Source: [OAG](#)

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## Top 20 Scheduled Airlines

In case anyone had forgotten how bad the pandemic was for the airline industry, three of the top twenty airlines in the world this week operated no flights in the same week in 2020, and others were operating less than skeleton services; Emirates operated 2,500 seats – less than a dozen scheduled services! Happily, the situation this week is much improved, American Airlines are still the world’s largest airline and a clear distance ahead of Delta Air Lines in second spot; Ryanair in fourth position split the other two US major carriers.

British Airways are one of the few carriers that have a capacity reduction week-on-week and some of this may be as they ease back capacity post the Easter holiday period as well as some planned adjustments in light of available resources. Any schedule changes are frustrating but in the context of where airlines were two or even one year ago such changes are now minimal and made for the best commercial reasons; better to cancel now rather than on the day of departure seems a sensible approach.

### Top 20 Scheduled Airlines

Airline	13-Apr-20	12-Apr-21	11-Apr-22	18-Apr-22	% Change Week-on-Week	% Change Vs w/c 13 April 2019	% Change Vs w/c 12 April 2022
American Airlines	2,084,559	3,800,159	4,660,844	4,673,402	0.3%	124.2%	23.0%
Delta Air Lines	1,093,693	3,355,817	4,043,917	4,036,093	-0.2%	269.0%	20.3%
Southwest Airlines	3,012,481	2,887,250	3,827,627	3,830,139	0.1%	27.1%	32.7%
Ryanair		414,198	3,576,924	3,608,703	0.9%	#DIV/0!	771.3%
United Airlines	959,677	2,116,985	3,336,619	3,342,385	0.2%	248.3%	57.9%
IndiGo	370,448	1,557,004	1,984,982	2,028,936	2.2%	447.7%	30.3%
Easyjet		223,080	1,917,852	1,891,090	-1.4%	#DIV/0!	747.7%
China Southern Airlines	1,352,013	2,736,097	1,692,296	1,744,769	3.1%	29.0%	-36.2%
Turkish Airlines		946,226	1,545,414	1,560,325	1.0%	#DIV/0!	64.9%
LATAM Airlines Group	97,453	618,899	1,371,135	1,348,122	-1.7%	1283.4%	117.8%
Deutsche Lufthansa AG	85,016	390,157	1,300,777	1,338,770	2.9%	1474.7%	243.1%
China Eastern Airlines	1,112,986	2,458,914	1,381,224	1,231,370	-10.8%	10.6%	-49.9%
JetBlue Airways Corporation	154,494	691,842	1,081,297	1,069,494	-1.1%	592.3%	54.6%
Alaska Airlines	287,048	893,316	1,049,177	1,043,181	-0.6%	263.4%	16.8%
Emirates	2,478	509,213	987,241	991,017	0.4%	39892.6%	94.6%
British Airways	41,101	171,628	1,019,415	979,359	-3.9%	2282.8%	470.6%
Air China	852,752	1,771,189	976,184	965,429	-1.1%	13.2%	-45.5%
Air France	42,177	455,163	940,801	962,208	2.3%	2181.4%	111.4%
Wizz Air	890,560	176,668	949,856	960,910	1.2%	7.9%	443.9%
Spirit Airlines	67,578	696,595	950,374	898,766	-5.4%	1230.0%	29.0%

Source: [OAG](#)

**OAG**

So, although in terms of headline numbers this week's data is pretty similar to last there are more positive developments happening. The removal of the face mask requirement on US airlines announced yesterday is a real positive step, although the thought of smiling at the person next to you may feel odd for a while. Importantly it is another step in rebuilding traveller confidence and filling those 86 million seats on sale this week. New routes are also being launched and summer seasonal services are coming back, Air Canada have announced seasonal services to Dublin for instance and FlyBe are once again operating; it's beginning to feel like old times!