

Europe: All Set for a Busy Summer of Travel

Source : OAG

Having failed to secure himself an invitation to the Queen's Jubilee party this week, John Grant has taken himself off on holiday. We can't promise any football-related insights but we can break down what is happening this week in terms of global airline capacity.

Global Airline Capacity Bounces Back This Week

Global capacity this week has moved up above 90 million seats again this week, reaching 91.2m seats. This represents a 2.4% increase on last week, which translates to an additional 2.1m seats and is the highest weekly capacity has reached since before the pandemic. Regions benefitting from this increase include Europe which accounts for slightly more than half of the increase and reflects the demand for leisure travel right across the region as the summer season gets into full swing.

Scheduled Airline Capacity by Region

Region	27 May 2019	24 May 2021	23 May 2022	30 May 2022	% Change Week on Week	% Change Vs 24 May 2021	% Change Vs w/c 27 May 2019
Europe : Western Europe	25,075,151	7,435,253	22,144,856	23,020,750	4.0%	209.6%	-8.2%
North America	24,413,610	16,974,601	21,941,022	22,341,164	1.8%	31.6%	-8.5%
Asia : North East Asia	23,851,534	20,020,645	13,078,077	13,266,294	1.4%	-33.7%	-44.4%
Asia : South East Asia	9,959,762	3,416,650	6,485,805	6,672,575	2.9%	95.3%	-33.0%
Asia : South Asia	4,714,848	2,180,632	4,703,195	4,700,414	-0.1%	115.6%	-0.3%
Middle East	4,779,116	2,424,037	4,020,183	4,074,379	1.3%	68.1%	-14.7%
Europe : Eastern/Central Europe	4,681,787	2,751,476	3,378,420	3,743,174	10.8%	36.0%	-20.0%
Latin America : Lower South America	3,473,635	1,522,378	2,961,455	2,939,553	-0.7%	93.1%	-15.4%
Latin America : Central America	2,263,430	1,784,422	2,412,451	2,441,047	1.2%	36.8%	7.8%
Southwest Pacific	2,664,792	1,818,993	2,161,751	2,154,497	-0.3%	18.4%	-19.1%
Latin America : Upper South America	1,651,530	989,283	1,730,435	1,758,018	1.6%	77.7%	6.4%
Africa : North Africa	995,448	446,311	944,283	986,438	4.5%	121.0%	-0.9%
Latin America : Caribbean	877,825	566,425	772,433	778,795	0.8%	37.5%	-11.3%
Africa : Central/Western Africa	533,813	406,335	680,368	677,150	-0.5%	66.6%	26.9%
Africa : Eastern Africa	696,839	429,583	598,060	616,558	3.1%	43.5%	-11.5%
Africa : Southern Africa	777,103	373,668	566,197	561,866	-0.8%	50.4%	-27.7%
Asia : Central Asia	370,717	295,736	414,563	427,279	3.1%	44.5%	15.3%
Grand Total	111,780,940	63,836,428	88,993,554	91,159,951	2.4%	42.8%	-18.4%

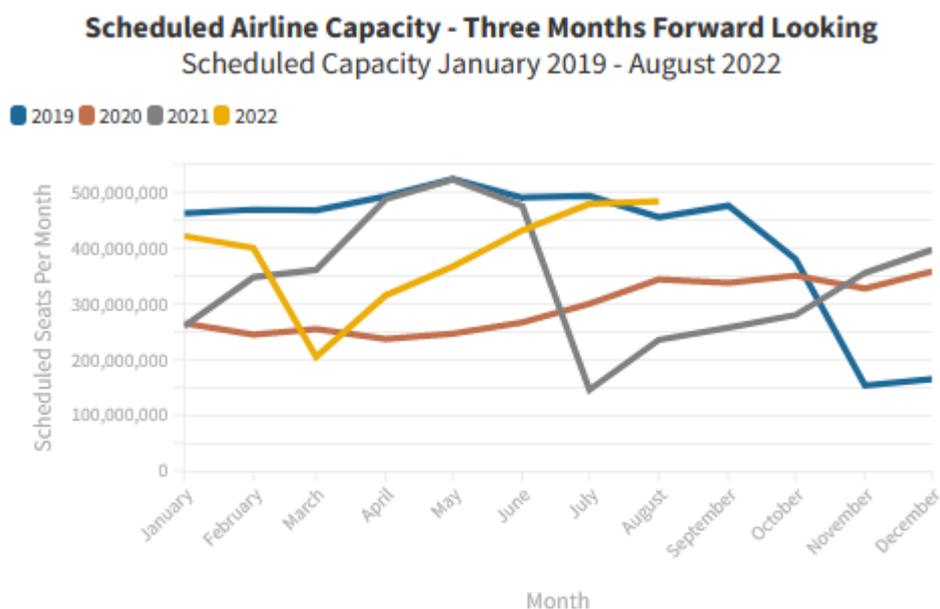
Source: [OAG](#)

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We heard [last week](#) that Western Europe had become the largest regional market and it retains that place this week too, widening the gap between it and North America from 200,000 seats last week to nearly 700,000 seats this week. This also means that Western Europe is now less than 10% behind the same week in 2019, considerably better than the global trend. There is a slight note of caution however as although schedules appear to be normalising in Western Europe, airports and airlines are still experiencing congestion and staffing issues, so we expect cancellations and delays to remain a feature for some weeks to come yet as the industry works hard to serve current demand.

Looking Forward to the Summer

Looking forward at scheduled airline capacity for the summer season, airlines are still predicting a steady increase, with capacity potentially reaching 2019 levels by August. This reflects a change on previous weeks where we've seen forward capacity tracking 5-10% below 2019 levels. Will it materialise? As has been the case throughout the pandemic, it's just too early to say. Although many parts of Asia are starting to reopen and there are positive noises from Japan about cautiously reopening this summer, and finally even some public recognition last week from the authorities there of the importance of international air service to China, there are just too many variables to confidently predict a full recovery of global capacity by August.



Source: [OAG](#)

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Recovery Mixed Across the World's Largest Country Markets

So where is seeing most recovery? The [USA](#) remains the largest country market by a long way, at 20.6m seats this week – against China with just 8.7m, some 44% below the same week in 2019. Only 4 of the Top 20 largest country markets have seen capacity rise above 2019 levels – India, Mexico, Vietnam and Greece.

Strongest of these in terms of year on year (and for this week v's last) growth is Greece, which has made it into the Top 20 this week, knocking out Colombia, and where capacity has increased by 13.9% on last week, taking the country to 13.3% above the same week in 2019. Great news for Greece and its Ouzo producers, who are seeing tourists return in their droves - what better way to put the memories of the airport queues out of mind?

Scheduled Capacity, Top 20 Country Markets

Country	27 May 2019	24 May 2021	23 May 2022	30 May 2022	% Change Week on Week	% Change Vs 24 May 2021	% Change Vs w/c 27 May 2019
USA	22,367,181	16,588,054	20,308,101	20,611,478	1.5%	24.3%	-7.8%
China	15,657,316	16,918,489	8,647,710	8,743,845	1.1%	-48.3%	-44.2%
India	3,945,799	1,717,419	3,954,347	3,972,371	0.5%	131.3%	0.7%
United Kingdom	3,820,675	792,817	3,206,697	3,305,413	3.1%	316.9%	-13.5%
Spain	3,375,902	1,157,274	3,148,557	3,209,273	1.9%	177.3%	-4.9%
Germany	3,245,296	733,738	2,641,815	2,794,690	5.8%	280.9%	-13.9%
Japan	4,079,416	1,483,215	2,747,371	2,766,541	0.7%	86.5%	-32.2%
Italy	2,474,628	645,319	2,293,246	2,401,217	4.7%	272.1%	-3.0%
Turkey	2,412,941	1,245,165	2,196,669	2,272,906	3.5%	82.5%	-5.8%
Indonesia	2,989,409	1,957,123	2,222,273	2,229,640	0.3%	13.9%	-25.4%
Brazil	2,475,425	1,188,710	2,203,906	2,185,959	-0.8%	83.9%	-11.7%
Russian Federation	2,563,762	2,271,250	1,914,280	2,174,625	13.6%	-4.3%	-15.2%
France	2,378,640	770,625	2,090,040	2,174,532	4.0%	182.2%	-8.6%
Mexico	1,797,196	1,499,441	1,990,719	2,010,066	1.0%	34.1%	11.8%
Canada	2,034,101	377,887	1,621,575	1,718,028	5.9%	354.6%	-15.5%
Australia	1,953,265	1,387,859	1,678,180	1,673,095	-0.3%	20.6%	-14.3%
Viet Nam	1,388,509	675,323	1,386,725	1,475,651	6.4%	118.5%	6.3%
Saudi Arabia	1,320,429	754,590	1,129,264	1,139,124	0.9%	51.0%	-13.7%
United Arab Emirates	1,331,647	546,367	1,117,478	1,118,002	0.0%	104.6%	-16.0%
Greece	917,701	382,974	912,857	1,039,531	13.9%	171.4%	13.3%

Source: [OAG](#)

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All Nippon Airways is Back

As hinted at last week, and undoubtedly boosted by the news that Japan will begin reopening to tourists on 10 June, All Nippon Airways made it back into the Top 20 this week, with a 1.2% increase in airline capacity week on week being enough to edge them up and push Spirit Airlines down to 21st place. Air China remains outside of the Top 20 too, and has seen capacity increase slightly this week on last week, unlike its peers who have both trimmed capacity this week.

The Top 10 positions remain unchanged, but there is a bit more movement in the rest of the Top 20. Wizz Air climbs from 18th to 15th and now is operating almost a third more capacity than the same week in 2019.

Top 20 Scheduled Airlines

Airline	27 May 2019	24 May 2021	23 May 2022	30 May 2022	% Change Week on Week	% Change Vs 24 May 2021	% Change Vs w/c 27 May 2019
American Airlines	5,161,779	4,142,260	4,741,839	4,867,943	2.7%	17.5%	-5.7%
Delta Air Lines	4,815,656	3,522,805	4,048,959	4,145,202	2.4%	17.7%	-13.9%
Southwest Airlines	4,090,719	3,247,918	3,870,189	3,905,209	0.9%	20.2%	-4.5%
Ryanair	3,190,320	582,282	3,757,356	3,835,044	2.1%	558.6%	20.2%
United Airlines	3,859,767	2,360,343	3,482,045	3,527,890	1.3%	49.5%	-8.6%
Easyjet	2,240,926	412,322	2,177,422	2,259,926	3.8%	448.1%	0.8%
IndiGo	1,695,832	534,744	2,031,812	2,035,926	0.2%	280.7%	20.1%
Turkish Airlines	1,856,331	989,405	1,841,036	1,888,063	2.6%	90.8%	1.7%
Deutsche Lufthansa AG	1,814,636	488,024	1,464,826	1,515,484	3.5%	210.5%	-16.5%
LATAM Airlines Group	1,541,705	698,043	1,421,765	1,411,729	-0.7%	102.2%	-8.4%
China Southern Airlines	2,620,254	2,766,011	1,398,157	1,344,410	-3.8%	-51.4%	-48.7%
Air France	1,138,684	486,953	999,867	1,066,662	6.7%	119.0%	-6.3%
Alaska Airlines	1,130,305	956,903	1,051,263	1,034,582	-1.6%	8.1%	-8.5%
China Eastern Airlines	2,534,811	2,459,106	1,043,675	1,029,353	-1.4%	-58.1%	-59.4%
Wizz Air	785,348	275,088	985,126	1,027,553	4.3%	273.5%	30.8%
British Airways	1,281,745	253,598	1,021,959	1,015,216	-0.7%	300.3%	-20.8%
Emirates	1,309,682	418,973	1,007,936	1,004,754	-0.3%	139.8%	-23.3%
Air Canada	1,216,254	187,220	930,711	1,004,626	7.9%	436.6%	-17.4%
JetBlue Airways Corporation	995,528	809,922	993,324	943,291	-5.0%	16.5%	-5.2%
All Nippon Airways	1,426,839	414,382	919,331	930,397	1.2%	124.5%	-34.8%

Source: [OAG](#)

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Busiest International Airports Still Dominated by European Hubs

With strong growth continuing in Western Europe this week, we decided to take a look at how the international airports league table is shaping up. Unsurprisingly, the Top 20 airports list (ranked by international capacity) is still dominated by European airports, with 16 of the world's busiest international airports located in Western Europe this week. Notable absentees from the list include Hong Kong, Seoul Incheon, Bangkok, Taipei and Kuala Lumpur, although Singapore is back in the Top 20, in 11th place, albeit operating just under half of its 2019 capacity currently. London Heathrow remains in first place this week as the busiest international airport, with Amsterdam not far behind.

Top 20 Airports Then and Now
Scheduled International Capacity

Top 20 Airports	w/c 3 June 2019	Top 20 Airports	w/c 30 May 2022
Dubai International	1,059,651	London Heathrow	792,191
London Heathrow	932,481	Amsterdam	741,357
Hong Kong	888,997	Dubai International	701,406
Paris CDG	835,128	Paris CDG	680,679
Amsterdam	834,833	Frankfurt	644,302
Frankfurt	830,000	Istanbul	588,124
Singapore Changi	813,650	London Gatwick	472,161
Seoul Incheon	811,316	Doha	466,469
Istanbul Airport	625,567	Berlin	443,527
Bangkok Suvarnabhumi	610,272	Madrid	437,444
Taipei Taiwan Taoyuan	578,193	Singapore Changi	398,828
Kuala Lumpur	553,131	Munich	397,213
London Gatwick	534,037	Dublin	391,729
Madrid	527,050	Barcelona	382,543
Doha	519,743	Palma de Mallorca	372,688
Munich	518,778	New York JFK	362,940
Barcelona	490,604	Vienna	346,310
Shanghai Pudong	450,909	Manchester	333,517
Rome Fiumicino	432,245	Zurich	332,210
New York JFK	432,190	Lisbon	319,649

Source: [OAG](#)

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So, another strong week for European aviation, and signs of recovery beginning to build in parts of Asia. We look forward to seeing what next week brings!