

November 2021

OAG TAKE OFF 2021

Essential metrics on the world's major airlines

ABOUT OAG TAKE OFF

OAG Take Off brings together essential metrics for the world's biggest airlines.

Inclusion is based on Airline Seat Capacity for S21 (Summer 2021) as of w/c 20 September 2021.

Data from Schedules Analyzer is for the Summer Season for 2019 (S19) and 2021. Summer 2019 (31 March 2019 – 26 October 2019) and Summer 2021 (28 March 2021 – 30 October 2021).

The Top 5 Airlines by seat capacity for each of the 5 regions – Africa & the Middle East, Asia Pacific (excluding China), Europe, Latin America and North America. There is a separate category for the 5 largest airlines in China.

The number of airline routes operated are those by the carrier across their network in S19 and S21.

Schedule Volatility Rate % measures how much the airline schedule has changed in the two weeks prior to flights. This measure is calculated by looking at the schedule for each airline at two points in time, two weeks before operating, and two weeks later to compare how much the schedule has changed. This generates a % volatility rate, and this is calculated for a point in S19 and then S21.

ASIA PACIFIC

IndiGo is currently the largest airline by seat volume in Asia Pacific. It is operating at almost three quarters of S19 levels in capacity terms and is currently the 10th largest airline globally. Although predominantly a domestic airline, 9% of IndiGo's S19 capacity operated internationally. Currently, international airline capacity is only operating at 37% of S19 levels.

Qantas was the most international of these five airlines, with 32% of seats operating internationally in more normal times. Currently, just 7% of Qantas capacity is operating on international airline routes although this is set to change with Australia's planned reopening in November 2021.

Of the five airlines, **All Nippon Airways** has the largest active fleet, with 252 aircraft, however IndiGo is not far behind with 245 seats and a massive 573 aircraft on order. Lion Air has a significant order book too, with 434 aircraft on order.

In terms of network volatility, all five airlines have seen an increase in changes to their airline schedule in the two weeks before departure.

ASIA PACIFIC TOP 5 CARRIERS



Carrier	Seat Capacity			Frequency			Ave Seats per Frequency		
	S19	S21	% Recovered vs. S19	S19	S21	% Recovered vs. S19	S19	S21	% Change vs. S19
IndiGo	51,141,066	37,541,924	73%	298,953	215,283	72%	171	174	2%
Lion Air	22,786,273	13,700,385	60%	110,951	67,962	61%	205	202	-2%
All Nippon Airways	31,769,117	13,640,518	43%	119,218	62,040	52%	266	220	-17%
Japan Airlines	27,025,037	13,542,817	50%	120,109	63,247	53%	225	214	-5%
Qantas Airways	17,888,558	7,615,954	43%	89,117	43,344	49%	201	176	-12%

Carrier	Domestic Capacity			International Capacity			Global Ranking by Capacity		
	S19	S21	% Recovered vs. S19	S19	S21	% Recovered vs. S19	S19	S21	Change
IndiGo	46,420,572	35,816,942	77%	4,720,494	1,724,982	37%	12	10	2
Lion Air	21,229,044	13,688,449	64%	1,557,229	11,936	1%	38	39	-1
All Nippon Airways	25,271,894	12,135,583	48%	6,497,223	1,504,935	23%	14	26	-12
Japan Airlines	20,571,793	11,677,839	57%	6,453,244	1,864,978	29%	22	33	-11
Qantas Airways	12,213,880	7,084,632	58%	5,674,678	531,322	9%	35	49	-14

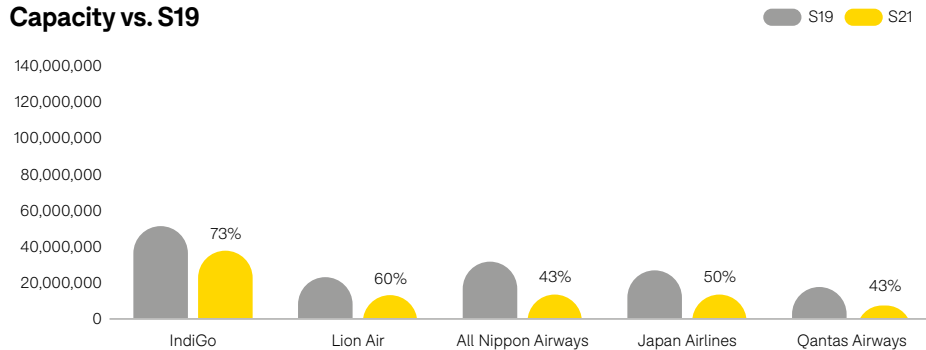
Carrier	Domestic Share of Capacity			International Share of Capacity			Routes Operated		
	S19	S21	Change	S19	S21	Change	S19	S21	Variance
IndiGo	91%	95%	5%	9%	5%	-5%	356	458	102
Lion Air	93%	100%	7%	7%	0%	-7%	200	86	-114
All Nippon Airways	80%	89%	9%	20%	11%	-9%	165	128	-37
Japan Airlines	76%	86%	10%	24%	14%	-10%	107	104	-3
Qantas Airways	68%	93%	25%	32%	7%	-25%	98	100	2

Carrier	Schedule volatility rate			Frequency		
	S19	S21		In service	Inactive	On Order
IndiGo	-0.7%	2.4%		245	35	573
Lion Air	0.9%	11.8%		73	60	434
All Nippon Airways	0.4%	-16.5%		252	11	86
Japan Airlines	0.0%	-0.2%		156	7	54
Qantas Airways	0.0%	3.4%		107	19	39

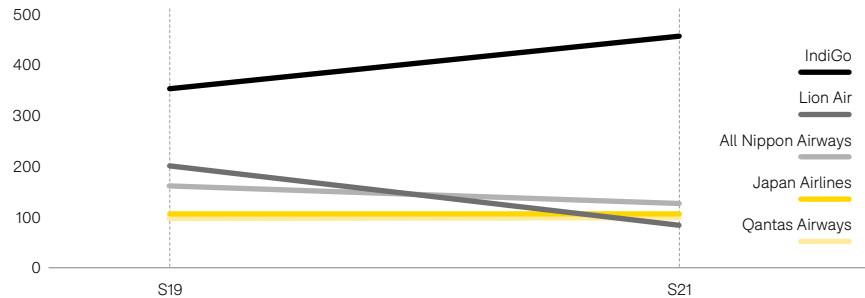
ASIA PACIFIC TOP 5 CARRIERS



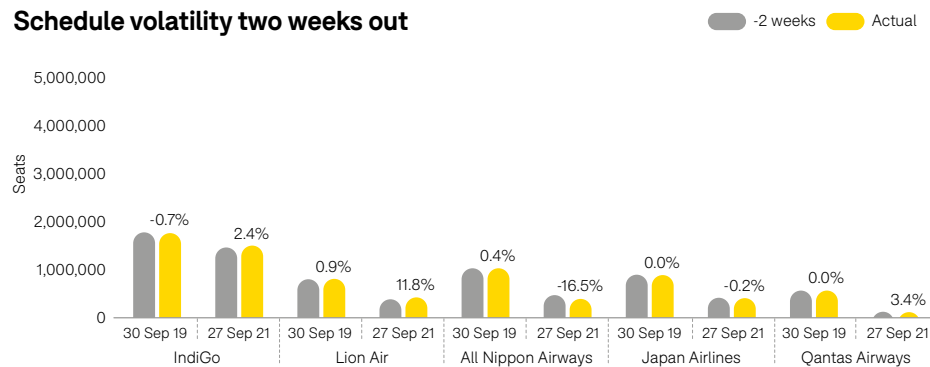
Capacity vs. S19



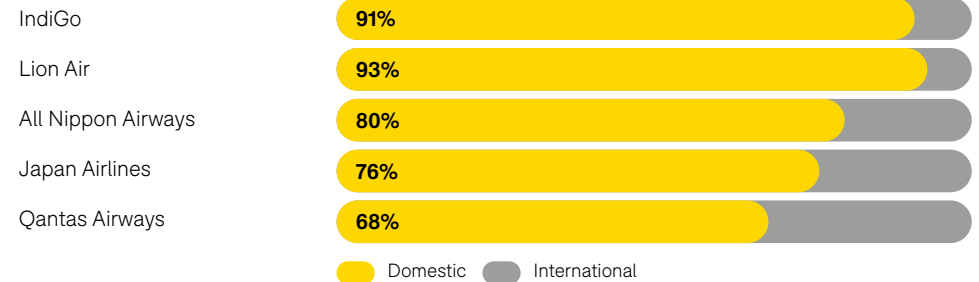
Routes operated



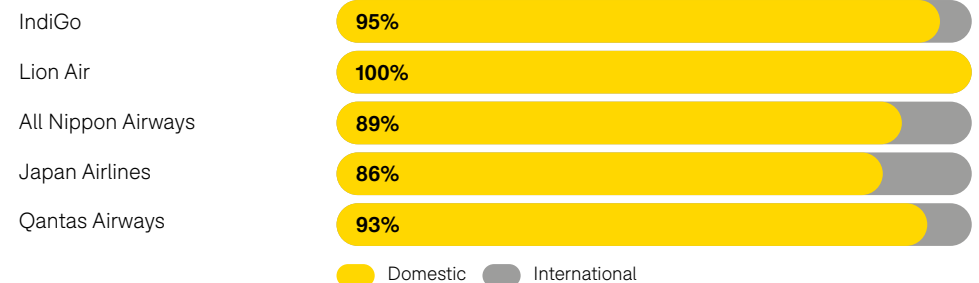
Schedule volatility two weeks out



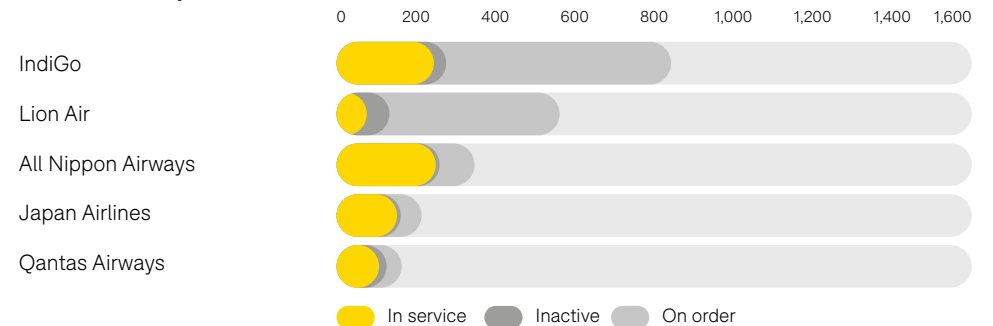
S19 capacity by type



S21 capacity by type



Current fleet position



EUROPE

Ryanair is currently the largest airline by seat volume in Europe, and the 7th largest airline in the world, based on capacity in S21. Ryanair has operated 1,325 routes in S21, which is 31% fewer than in S19. Ryanair is also the most international of the Top 5, with 85% of seats in S19 operating internationally, with a small increase in S21 to 87%. Although European travel has seen some considerable recovery this summer as markets reopen, Ryanair capacity is still 63% behind that of S19. The other airlines in Europe's Top 5 have seen a similar recovery rate, with the exception of Turkish Airlines which is 61% recovered on international airline capacity.

Aeroflot is the only airline to have seen a full recovery in its domestic airline capacity, currently operating at 102% of S19 levels. Turkish is next closest, with 74% of S19 levels operating in S21.

All of the Top 5 have a considerable amount of aircraft on order, ranking from Turkish with 90 aircraft (comprising of A321neos and A350-900s) through to Ryanair with 191 B737 MAX aircraft on order.

All five airlines have seen their networks become more volatile, with Aeroflot and Deutsche Lufthansa most affected, seeing schedules vary by up to 4% in the two weeks before departure. Back in 2019 there was very little schedule variation – less than 0.5% for these two airlines.

EUROPE TOP 5 CARRIERS



Carrier	Seat Capacity			Frequency			Ave Seats per Frequency		
	S19	S21	% Recovered vs. S19	S19	S21	% Recovered vs. S19	S19	S21	% Change vs. S19
Ryanair	94,184,748	34,591,338	37%	498,332	183,655	37%	189	188	0%
Turkish Airlines	45,946,060	29,710,411	65%	233,715	147,941	63%	197	201	2%
Easyjet	67,667,882	27,567,584	41%	390,062	152,968	39%	173	180	4%
Aeroflot Russian Airlines	27,899,227	19,463,137	70%	171,698	107,993	63%	162	180	11%
Deutsche Lufthansa AG	46,658,847	18,259,391	39%	240,403	98,581	41%	194	185	-5%

Carrier	Domestic Capacity			International Capacity			Global Ranking by Capacity		
	S19	S21	% Recovered vs. S19	S19	S21	% Recovered vs. S19	S19	S21	Change
Ryanair	13,723,668	4,400,631	32%	80,461,080	30,190,707	38%	5	7	-2
Turkish Airlines	12,360,187	9,127,337	74%	33,585,873	20,583,074	61%	9	9	0
Easyjet	13,638,654	9,574,159	70%	54,029,228	17,993,425	33%	8	13	-5
Aeroflot Russian Airlines	12,121,153	12,332,637	102%	15,778,074	7,130,500	45%	19	14	5
Deutsche Lufthansa AG	9,755,252	2,392,666	25%	36,903,595	15,866,725	43%	10	21	-11

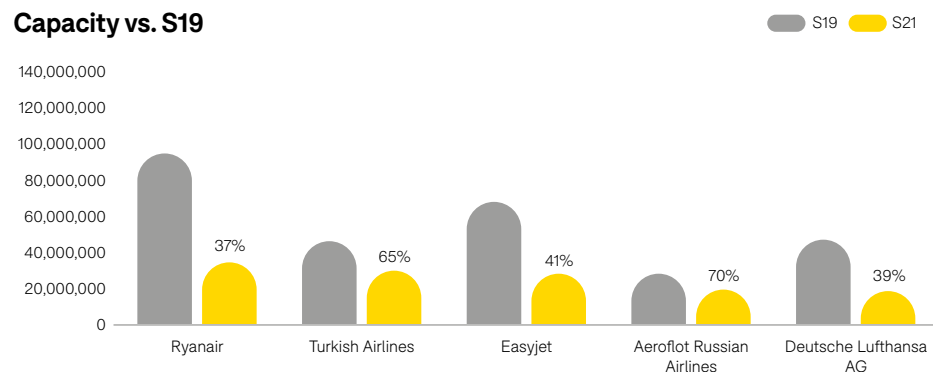
Carrier	Domestic Share of Capacity			International Share of Capacity			Routes Operated		
	S19	S21	Change	S19	S21	Change	S19	S21	Variance
Ryanair	15%	13%	-2%	85%	87%	2%	1,931	1,325	-606
Turkish Airlines	27%	31%	4%	73%	69%	-4%	775	354	-421
Easyjet	20%	35%	15%	80%	65%	-15%	1,013	827	-186
Aeroflot Russian Airlines	43%	63%	20%	57%	37%	-20%	164	244	80
Deutsche Lufthansa AG	21%	13%	-8%	79%	87%	8%	300	468	168

Carrier	Schedule volatility rate			Frequency		
	S19	S21		In service	Inactive	On Order
Ryanair	1.5%	-2.2%		259	1	191
Turkish Airlines	-1.5%	2.1%		334	22	90
Easyjet	0.0%	-2.1%		132	42	108
Aeroflot Russian Airlines	-0.4%	-4.1%		193	18	152
Deutsche Lufthansa AG	0.2%	4.2%		208	55	156

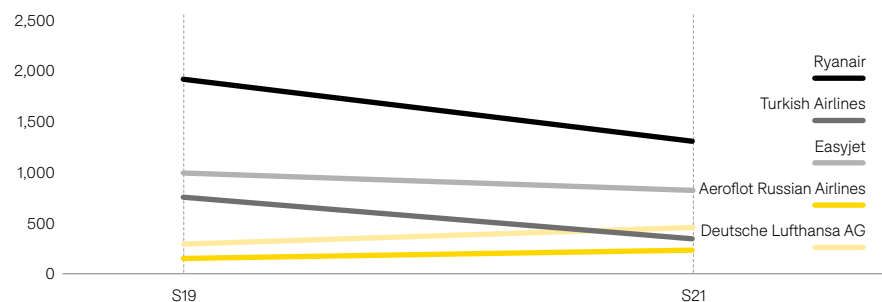
EUROPE TOP 5 CARRIERS



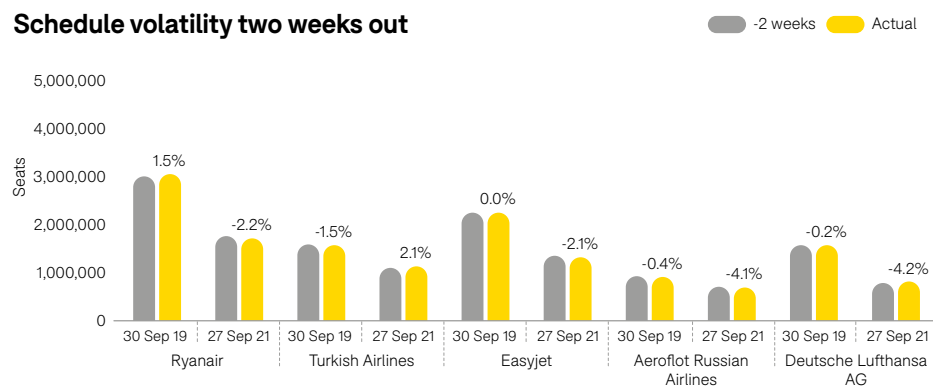
Capacity vs. S19



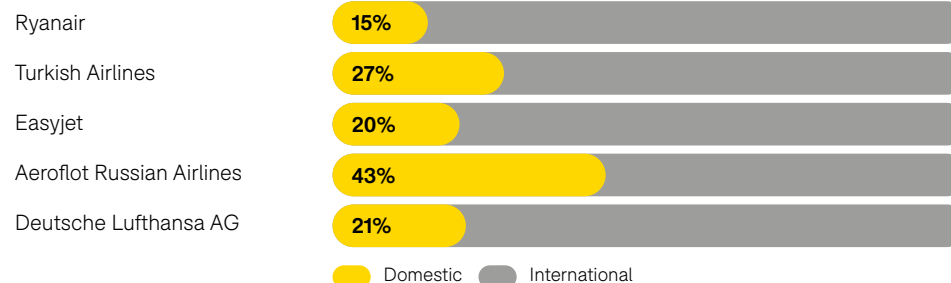
Routes operated



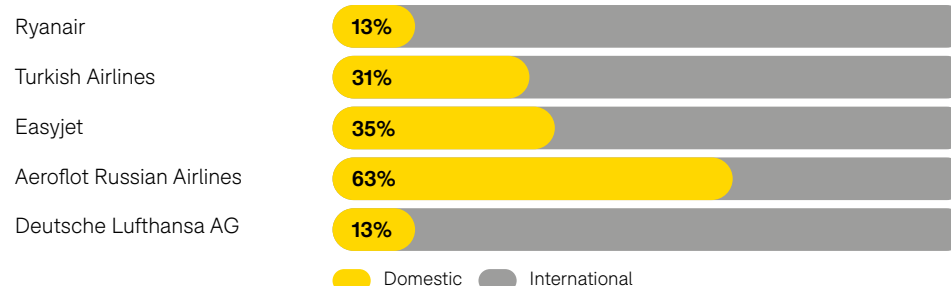
Schedule volatility two weeks out



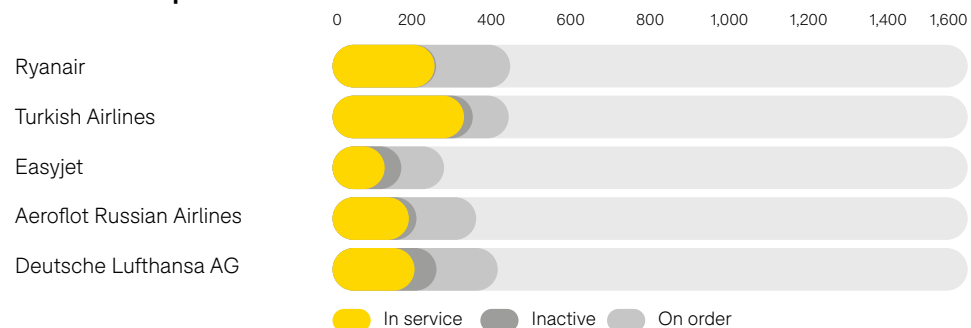
S19 capacity by type



S21 capacity by type



Current fleet position



LATIN AMERICA

The Mexican based ultra LCC (Low Cost Carrier), **Volaris** is currently the largest airline in Latin America, operating much of its capacity in the Mexican domestic aviation market which has recovered beyond S19 levels and is growing. Volaris has operated domestic capacity in S21 at 115% of S19 levels and international capacity at 117%. They are currently the 31st largest airline in the world, up from 56th in S19, and operate just 15 fewer routes than S19.

Mexico's national airline, **Aeromexico**, is in 4th place, and has seen domestic capacity recover even more strongly, sitting at 142% of S19 levels although their international capacity is not yet recovered, sitting at 67% of S19. Normally, just over half of Aeromexico's flight capacity operates internationally, whilst currently this is just 36%. The **LATAM Airlines Group** is normally even more international, with 56% of capacity operating on international routes in S19, but currently this summer has just 16% of seats operating internationally.

Ordinarily the largest of the airlines in this group, **GOL**, the Brazilian based LCC, is now third largest in the region, reflecting the slower paced recovery in the Brazilian market. Gol's domestic capacity level is just over half that operated in S19 and although predominantly a domestic airline 6% of its capacity pre COVID operated internationally. Currently it has no international services.

LATIN AMERICA TOP 5 CARRIERS



Carrier	Seat Capacity			Frequency			Ave Seats per Frequency		
	S19	S21	% Recovered vs. S19	S19	S21	% Recovered vs. S19	S19	S21	% Change vs. S19
Volaris	15,274,539	17,626,533	115%	81,100	93,813	116%	188	188	0%
Azul Airlines	20,210,245	17,281,385	86%	169,131	128,185	76%	119	135	13%
GOL Linhas Aereas S.A.	25,615,662	12,481,758	49%	145,900	69,847	48%	176	179	2%
Aeromexico	8,024,154	8,146,003	102%	48,198	46,615	97%	166	175	5%
LATAM Airlines Group	6,347,618	5,552,805	87%	29,390	28,984	99%	216	192	-11%

Carrier	Domestic Capacity			International Capacity			Global Ranking by Capacity		
	S19	S21	% Recovered vs. S19	S19	S21	% Recovered vs. S19	S19	S21	Change
Volaris	12,386,601	14,237,329	115%	2,887,938	3,389,204	117%	56	31	25
Azul Airlines	19,297,843	17,064,120	88%	912,402	217,265	24%	42	32	10
GOL Linhas Aereas S.A.	24,004,296	12,480,084	52%	1,611,366	1,674	0%	28	44	-16
Aeromexico	3,690,592	5,253,050	142%	4,333,562	2,892,953	67%	60	42	18
LATAM Airlines Group	2,821,408	4,680,877	166%	3,526,210	871,928	25%	13	12	1

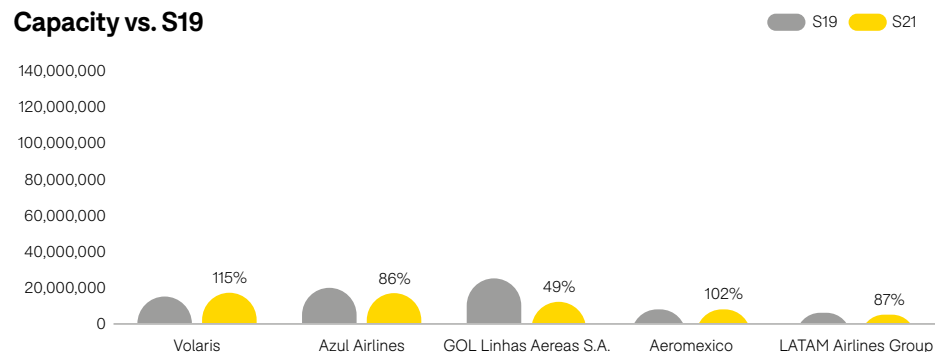
Carrier	Domestic Share of Capacity			International Share of Capacity			Routes Operated		
	S19	S21	Change	S19	S21	Change	S19	S21	Variance
Volaris	81%	81%	0%	19%	19%	0%	188	173	-15
Azul Airlines	95%	99%	3%	5%	1%	-3%	276	235	-41
GOL Linhas Aereas S.A.	94%	100%	6%	6%	0%	-6%	247	151	-96
Aeromexico	46%	64%	18%	54%	36%	-18%	70	63	-7
LATAM Airlines Group	44%	84%	40%	56%	16%	-40%	68	103	35

Carrier	Schedule volatility rate			Frequency		
	S19	S21		In service	Inactive	On Order
Volaris	0.0%	2.9%		90	0	95
Azul Airlines	-1.4%	0.4%		145	11	89
GOL Linhas Aereas S.A.	-0.1%	0.3%		96	31	110
Aeromexico	0.1%	4.1%		69	5	29
LATAM Airlines Group	0.0%	3.1%		115	14	56

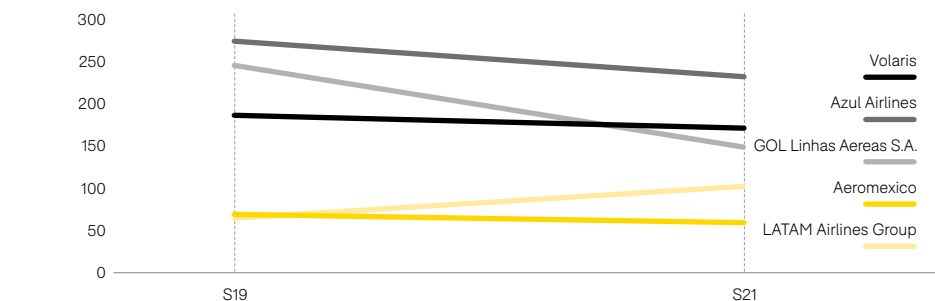
LATIN AMERICA TOP 5 CARRIERS



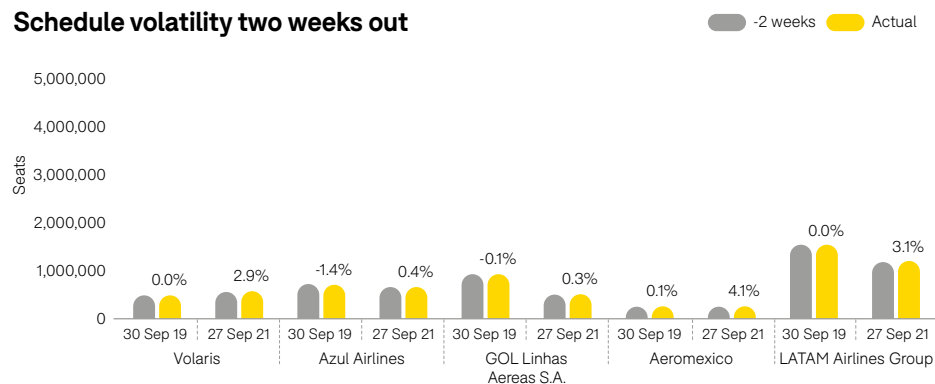
Capacity vs. S19



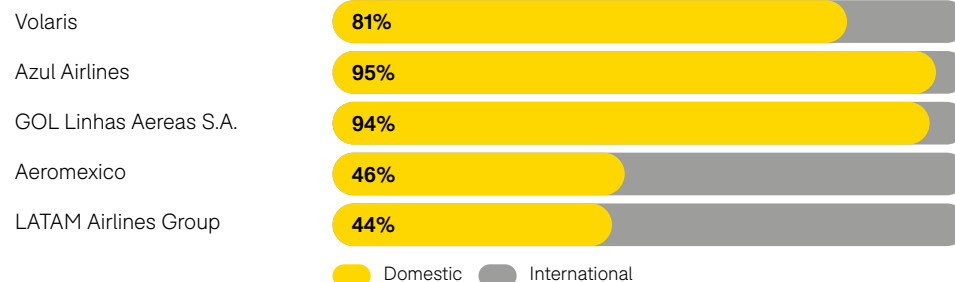
Routes operated



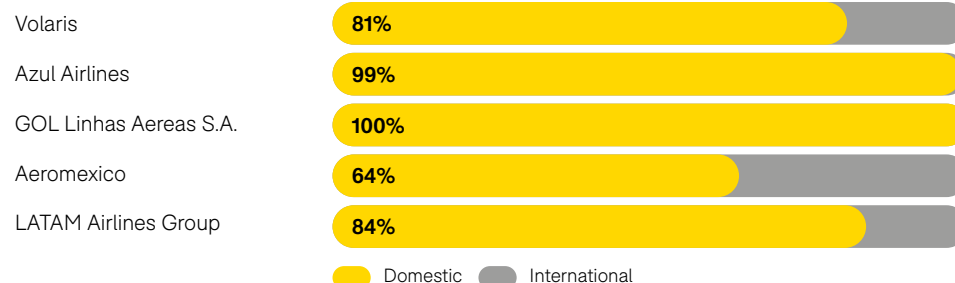
Schedule volatility two weeks out



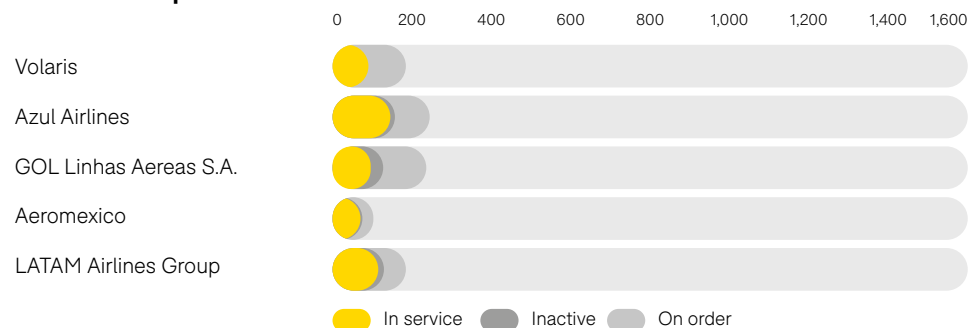
S19 capacity by type



S21 capacity by type



Current fleet position



MIDDLE EAST & AFRICA

Qatar Airways is currently the largest airline operating in the Middle East and Africa regions with Saudi Arabian Airlines not far behind. Both airlines along with **Egyptair** have recovered to around two thirds of their S19 capacity levels.

Emirates by contrast is operating just 41% of S19 capacity. Previously the 15th largest airline in the world, they are currently 30th largest. Although capacity is not yet recovered, in terms of their route network, they are operating 134 out of 155 routes previously operated.

Of the Top 5 airlines in the Middle East and Africa, Qatar has the biggest fleet with 204 aircraft currently operating, whilst Emirates has 182. Both Gulf airlines have a healthy order book with over 200 aircraft on order.

MIDDLE EAST & AFRICA TOP 5 CARRIERS



Carrier	Seat Capacity			Frequency			Ave Seats per Frequency		
	S19	S21	% Recovered vs. S19	S19	S21	% Recovered vs. S19	S19	S21	% Change vs. S19
Qatar Airways	28,399,362	18,536,187	65%	106,992	68,111	64%	265	272	3%
Saudi Arabian Airlines	27,457,253	18,019,566	66%	125,673	89,076	71%	218	202	-7%
Emirates	42,882,020	17,692,548	41%	105,197	47,114	45%	408	376	-8%
Ethiopian Airlines	12,168,415	8,847,928	73%	68,058	49,873	73%	179	177	-1%
Egyptair	7,799,006	5,221,301	67%	48,177	31,680	66%	162	165	2%

Carrier	Domestic Capacity			International Capacity			Global Ranking by Capacity		
	S19	S21	% Recovered vs. S19	S19	S21	% Recovered vs. S19	S19	S21	Change
Qatar Airways	301,382	189,399	63%	28,097,980	18,346,788	65%	24	27	-3
Saudi Arabian Airlines	13,397,996	11,628,010	87%	14,059,257	6,391,556	45%	25	29	-4
Emirates	73,132	95,347	130%	42,808,888	17,597,201	41%	15	30	-15
Ethiopian Airlines	2,096,752	1,812,851	86%	10,071,663	7,035,077	70%	72	59	13
Egyptair	1,202,161	1,135,025	94%	6,596,845	4,086,276	62%	103	90	13

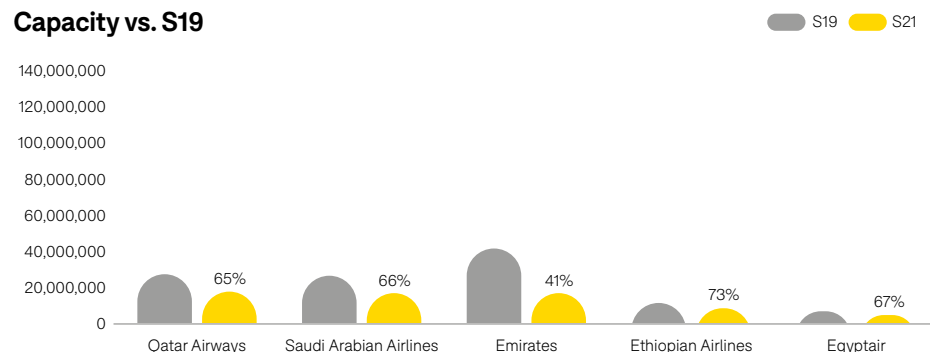
Carrier	Domestic Share of Capacity			International Share of Capacity			Routes Operated		
	S19	S21	Change	S19	S21	Change	S19	S21	Variance
Qatar Airways	1%	1%	0%	99%	99%	0%	173	167	-6
Saudi Arabian Airlines	49%	65%	16%	51%	35%	-16%	300	178	-122
Emirates	0%	1%	0%	100%	99%	0%	155	134	-21
Ethiopian Airlines	17%	20%	3%	83%	80%	-3%	214	166	-48
Egyptair	15%	22%	6%	85%	78%	-6%	145	159	14

Carrier	Schedule volatility rate			Frequency		
	S19	S21		In service	Inactive	On Order
Qatar Airways	-0.2%	-0.6%		204	17	211
Saudi Arabian Airlines	0.3%	4.1%		146	12	38
Emirates	-0.3%	3.0%		182	83	208
Ethiopian Airlines	-0.5%	1.5%		106	11	35
Egyptair	0.1%	-3.6%		62	12	9

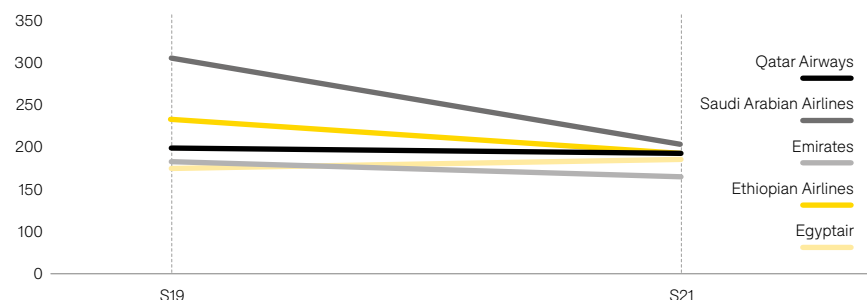
MIDDLE EAST & AFRICA TOP 5 CARRIERS



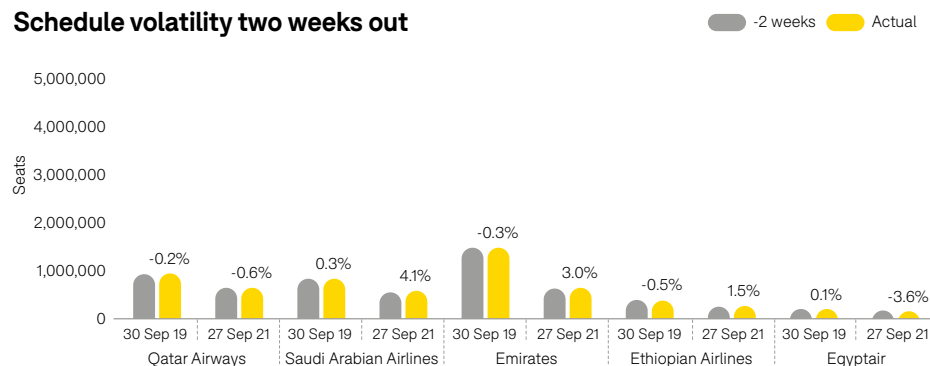
Capacity vs. S19



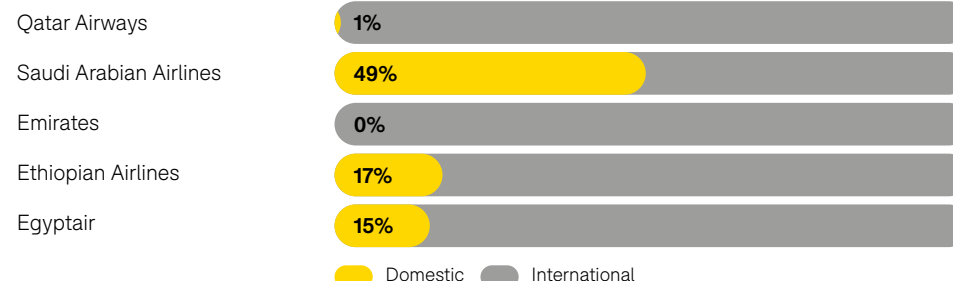
Routes operated



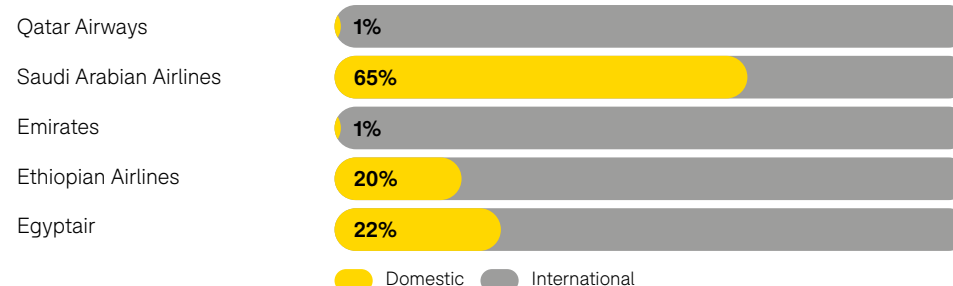
Schedule volatility two weeks out



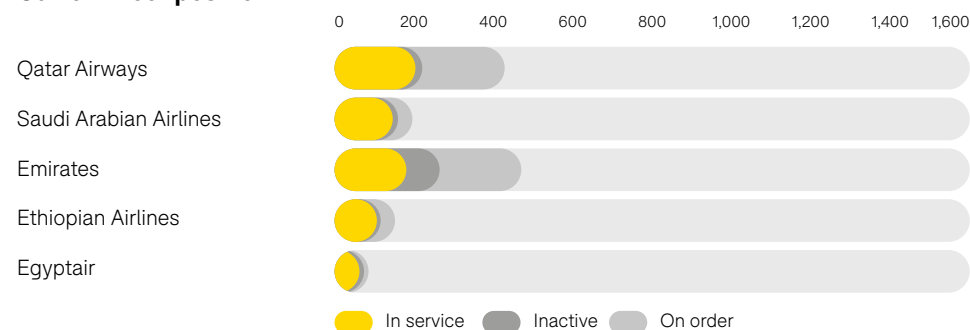
S19 capacity by type



S21 capacity by type



Current fleet position



NORTH AMERICA

Southwest Airlines is the largest North American (NAM) based airline currently and is operating capacity at 89% of S19 levels this summer, although the airline is now operating slightly more routes than in S19, with 905 instead of 817. Almost all of Southwest's airline capacity is deployed domestically, with just 3% of seats operating on international routes. Southwest remains the third largest global airline by seat volume. Its US peers – **American Airlines**, **Delta Air Lines** and **United Airlines** are all similarly unchanged in terms of global rankings, in 1st, 2nd and 4th place respectively.

The Top 5 airlines in the NAM group all have very low levels of network volatility, suggesting that scheduled flights have reached their optimum level for current demand, particularly in the USA.

All of the Top 5 airlines have large fleet orders, with the majority of this representing fleet replacement rather than expansion.

NORTH AMERICA TOP 5 CARRIERS



Carrier	Seat Capacity			Frequency			Ave Seats per Frequency		
	S19	S21	% Recovered vs. S19	S19	S21	% Recovered vs. S19	S19	S21	% Change vs. S19
Southwest Airlines	122,389,971	108,489,075	89%	813,373	697,757	86%	150	155	3%
American Airlines	108,862,093	96,035,661	88%	662,585	561,255	85%	164	171	4%
Delta Air Lines	113,777,805	88,914,969	78%	686,675	516,246	75%	166	172	4%
United Airlines	83,049,604	60,453,009	73%	477,803	351,380	74%	174	172	-1%
Alaska Airlines	26,276,442	21,113,131	80%	164,983	127,880	78%	159	165	4%

Carrier	Domestic Capacity			International Capacity			Global Ranking by Capacity		
	S19	S21	% Recovered vs. S19	S19	S21	% Recovered vs. S19	S19	S21	Change
Southwest Airlines	118,914,341	105,509,208	89%	3,475,630	2,979,867	86%	3	3	0
American Airlines	86,274,020	78,378,299	91%	22,588,073	17,657,362	78%	1	1	0
Delta Air Lines	94,170,167	77,405,421	82%	19,607,638	11,509,548	59%	2	2	0
United Airlines	61,765,512	45,683,322	74%	21,284,092	14,769,687	69%	4	4	0
Alaska Airlines	25,191,745	20,007,239	79%	1,084,697	1,105,892	102%	20	11	9

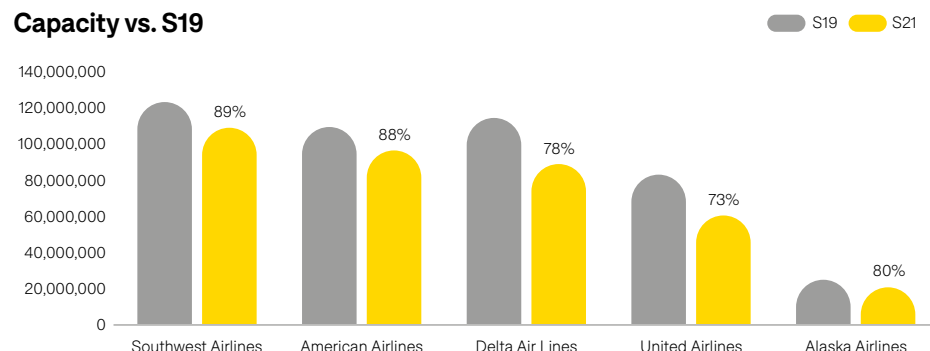
Carrier	Domestic Share of Capacity			International Share of Capacity			Routes Operated		
	S19	S21	Change	S19	S21	Change	S19	S21	Variance
Southwest Airlines	97%	97%	0%	3%	3%	0%	817	905	88
American Airlines	79%	82%	2%	21%	18%	-2%	662	644	-18
Delta Air Lines	83%	87%	4%	17%	13%	-4%	705	541	-164
United Airlines	74%	76%	1%	26%	24%	-1%	1,031	1,069	38
Alaska Airlines	96%	95%	-1%	4%	5%	1%	210	202	-8

Carrier	Schedule volatility rate			Frequency		
	S19	S21		In service	Inactive	On Order
Southwest Airlines	0.0%	0.3%		699	62	371
American Airlines	0.0%	0.3%		833	61	184
Delta Air Lines	0.0%	0.3%		759	96	251
United Airlines	0.3%	-0.9%		664	194	570
Alaska Airlines	-0.1%	-0.7%		203	33	130

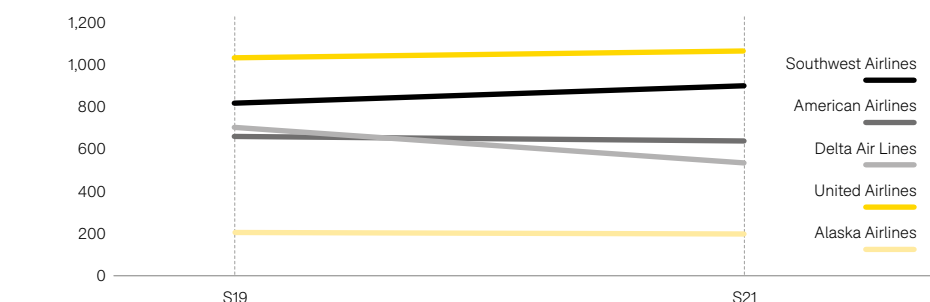
NORTH AMERICA TOP 5 CARRIERS



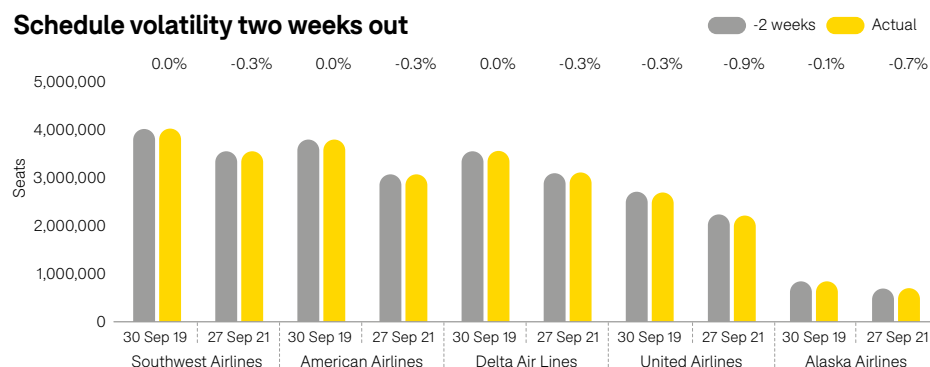
Capacity vs. S19



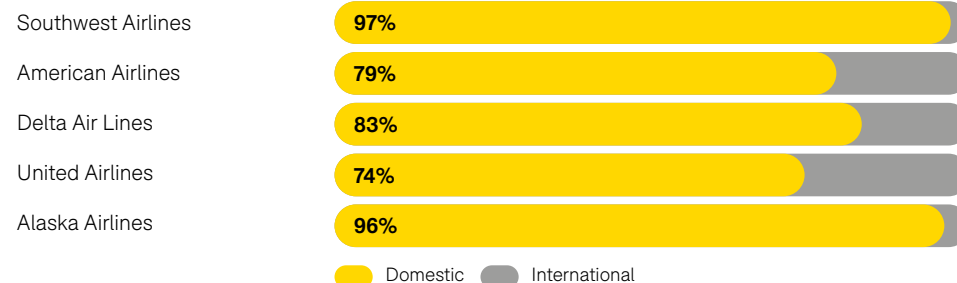
Routes operated



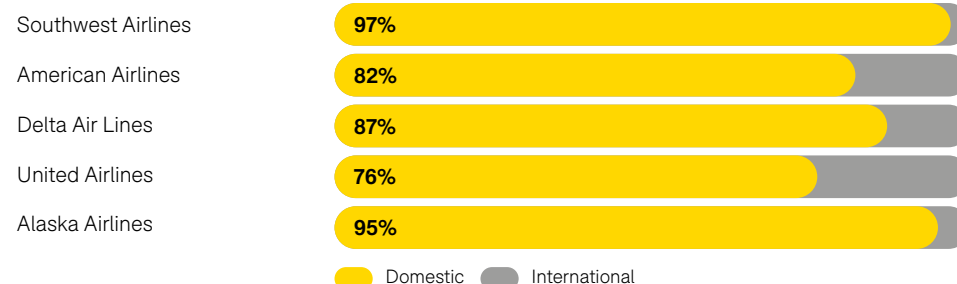
Schedule volatility two weeks out



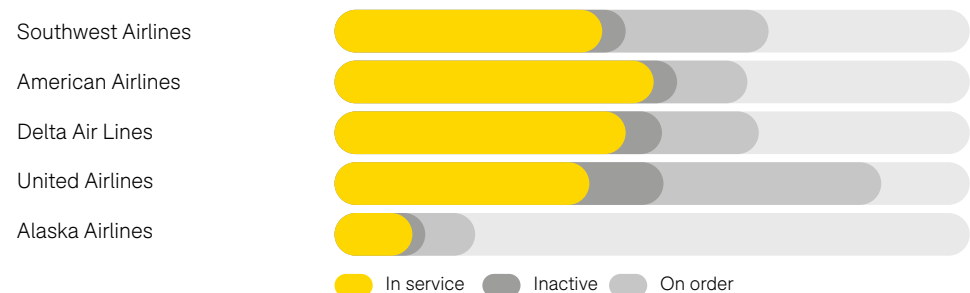
S19 capacity by type



S21 capacity by type



Current fleet position



CHINA

Southwest Airlines China's largest airlines have almost reached recovery. **China Southern Airlines**, the largest airline operating in China currently, is at 97% of S19 levels, and **China Eastern** and **Air China** are at 93% and 92% respectively. When looking at just domestic airline capacity, all of the Top 5 have capacity levels now far in excess of S19 levels, ranging from 110% for **Shenzhen Airlines** to 121% for **Sichuan Airlines**. By contrast, international airline capacity is operating at just 2-5% of S19 levels as China remains effectively closed for international travel.

The top five Chinese airlines still have a high degree of network volatility.

CHINA TOP 5 CARRIERS



Carrier	Seat Capacity			Frequency			Ave Seats per Frequency		
	S19	S21	% Recovered vs. S19	S19	S21	% Recovered vs. S19	S19	S21	% Change vs. S19
China Southern Airlines	81,685,537	79,505,604	97%	464,374	445,330	96%	176	179	1%
China Eastern Airlines	77,812,450	72,717,171	93%	464,454	445,034	96%	168	163	-2%
Air China	53,928,840	49,414,708	92%	289,261	271,934	94%	186	182	-3%
Shenzhen Airlines	24,895,223	25,290,225	102%	153,458	157,009	102%	162	161	-1%
Sichuan Airlines	23,100,547	25,174,576	109%	130,687	142,338	109%	177	177	0%

Carrier	Domestic Capacity			International Capacity			Global Ranking by Capacity		
	S19	S21	% Recovered vs. S19	S19	S21	% Recovered vs. S19	S19	S21	Change
China Southern Airlines	68,514,582	78,923,146	115%	13,170,955	582,458	4%	6	5	1
China Eastern Airlines	63,626,494	72,032,582	113%	14,185,956	684,589	5%	7	6	1
Air China	42,138,758	48,862,659	116%	11,790,082	552,049	5%	11	8	3
Shenzhen Airlines	22,964,928	25,260,801	110%	1,930,295	29,424	2%	30	17	13
Sichuan Airlines	20,728,053	25,105,953	121%	2,372,494	68,623	3%	36	18	18

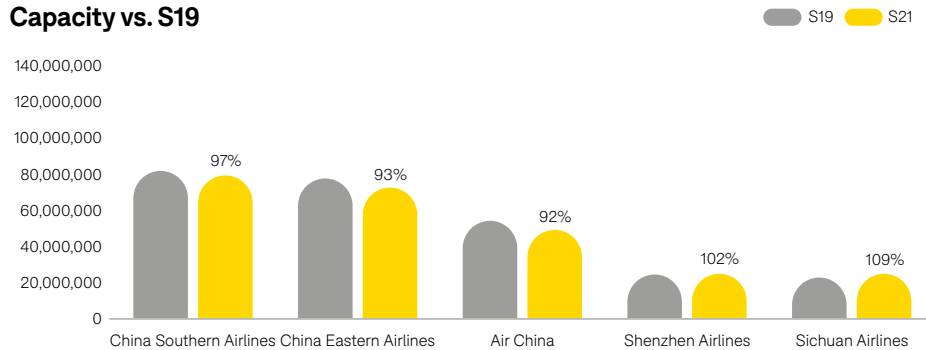
Carrier	Domestic Share of Capacity			International Share of Capacity			Routes Operated		
	S19	S21	Change	S19	S21	Change	S19	S21	Variance
China Southern Airlines	84%	99%	15%	16%	1%	-15%	826	684	-142
China Eastern Airlines	82%	99%	17%	18%	1%	-17%	891	821	-70
Air China	78%	99%	21%	22%	1%	-21%	518	504	-14
Shenzhen Airlines	92%	100%	8%	8%	0%	-8%	293	286	-7
Sichuan Airlines	90%	100%	10%	10%	0%	-10%	371	420	49

Carrier	Schedule volatility rate			Frequency		
	S19	S21		In service	Inactive	On Order
China Southern Airlines	-2.4%	4.2%		603	32	109
China Eastern Airlines	-2.4%	7.1%		587	9	95
Air China	-3.3%	1.8%		442	10	96
Shenzhen Airlines	0.9%	-3.8%		192	7	22
Sichuan Airlines	-1.1%	-2.1%		176	7	43

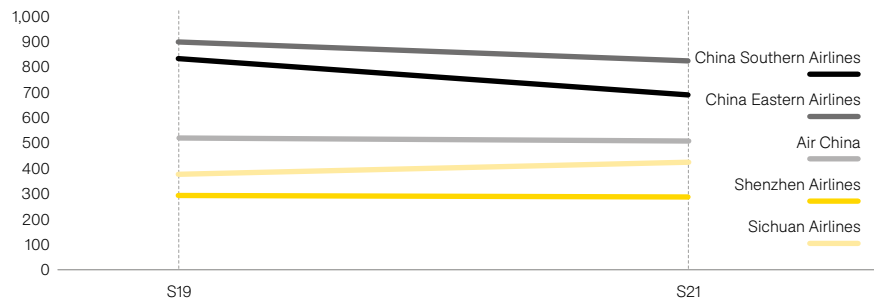
CHINA TOP 5 CARRIERS



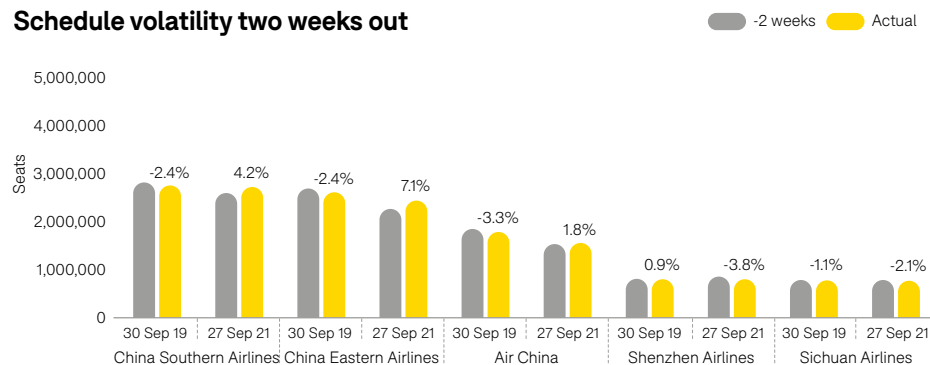
Capacity vs. S19



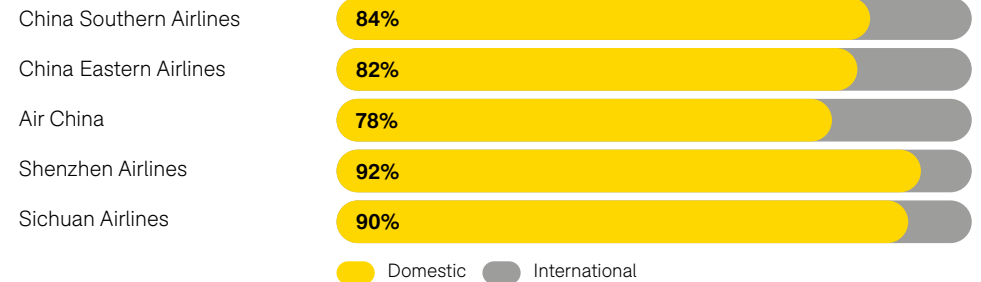
Routes operated



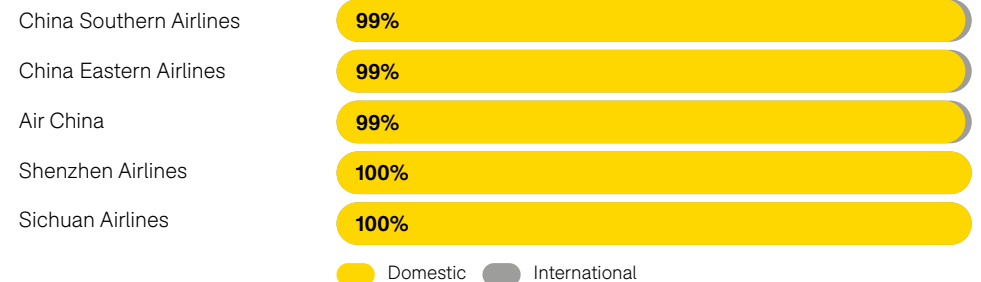
Schedule volatility two weeks out



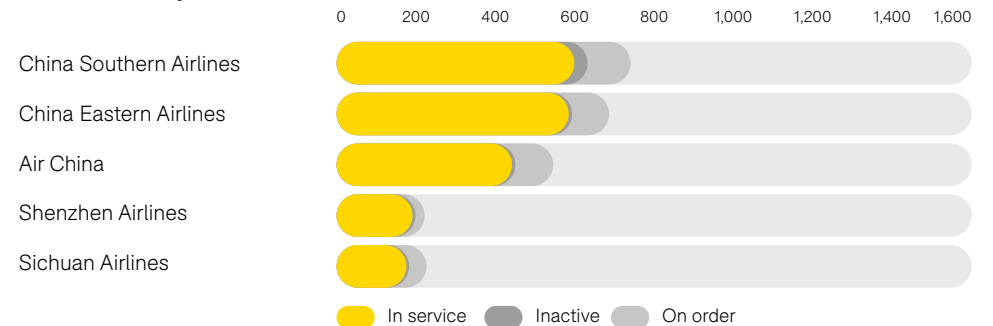
S19 capacity by type



S21 capacity by type



Current fleet position



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