

October 2020

OAG TAKEOFF 2020

**ESSENTIAL METRICS ON THE
WORLD'S MAJOR AIRLINES**

Top 20 Carriers by Global Seat Capacity for S20

ABOUT OAG TAKE-OFF

- The ranking is based on the Top 20 Carriers by Global Seat Capacity for summer 2020 as of w/c 28 September 2020
- Data from Schedules Analyser is for the summer Season for 2019 and 2020
- Number of Routes served is for the respective summer seasons subject to a minimum frequency of one flight per week
- The LATAM Airlines Group includes the following airlines: LATAM Airlines Group, LATAM Airlines Brasil and LATAM Airlines Ecuador
- The Top 5 airports by carrier are ranked by the largest in summer 2019
- The number of routes at the Top 5 airports are those operated in summer 2020 by the carrier at each airport
- Fleet data is sourced from CAPA (www.centreforaviation.com) as of 21 September 2020. Narrowbody fleet and aircraft on order figures include regional jets. Freighters are excluded

Rank	Airline	Seats (S20)
1	Southwest Airlines	76,776,909
2	China Southern	63,779,278
3	China Eastern	57,626,783
4	American Airlines	45,004,465
5	Delta Air Lines	40,412,555
6	Air China	36,753,292
7	Ryanair	25,425,999
8	United Airlines	21,539,221
9	All Nippon Airways	21,383,743
10	IndiGo	21,017,134
11	Easyjet	15,476,024
12	Turkish Airlines	10,489,951
13	Japan Airlines	10,255,480
14	Air France	10,085,292
15	Alaska Airlines	9,493,838
16	Aeroflot	8,808,241
17	Lufthansa	7,127,485
18	LATAM	6,810,760
19	British Airways	5,702,932
20	Air Canada	4,729,572

KPIs

Southwest Airlines retains its Number 1 position as the largest airline, as measured by seats offered, in the summer season. As a domestic US carrier, Southwest has benefitted from its lack of international air services this year, as international traffic has been much more impacted than domestic traffic. Domestic capacity was down by 36% across the summer season compared to summer 2019 although May was the low point at -61%, and capacity has steadily recovered since then. By August, capacity was 26% below 2019 levels.

	Total			Domestic			International		
	S19	S20	Change		S20	v S19		S20	v S19
Global Ranking (seats)	1	1	0	Seats per flight	153	3	Seats per flight	149	-2
Routes	732	633	-99	Routes	613	-67	Routes	20	-32
Seats	122,389,971	76,776,909	-37%	Seats	75,690,181	-36%	Seats	1,086,728	-69%
Flights	813,373	500,675	-38%	Flights	493,387	-38%	Flights	7,288	-68%

Fleet & Orders as of August 2020

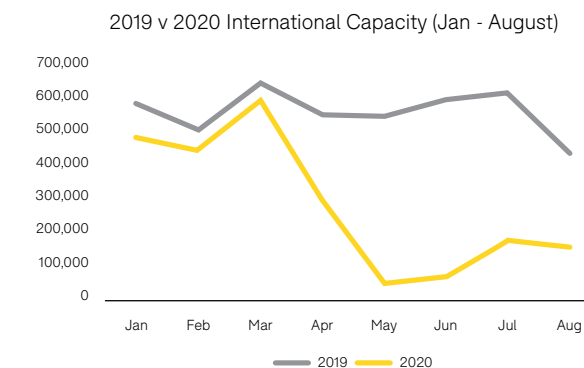
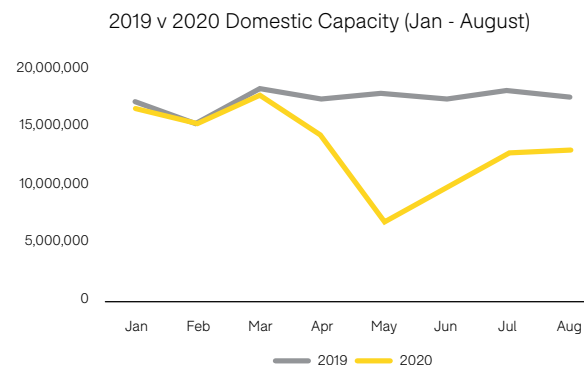
Bolstered by its strong domestic market, Southwest has only 14% of its fleet registered as inactive currently. The average age of the Southwest fleet is at the higher end of its peer group at 12.7 years, and some of the 261 aircraft on order will be used to replace ageing aircraft rather than grow the fleet.

Type	In service	Inactive	On Order
Narrowbody	634	105	261

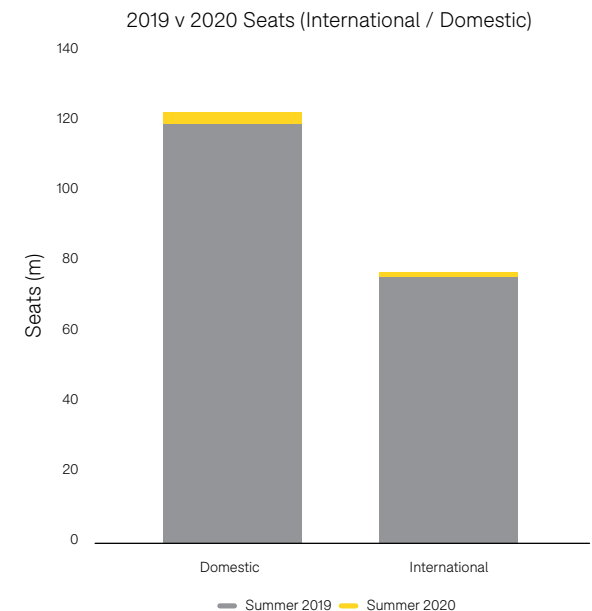
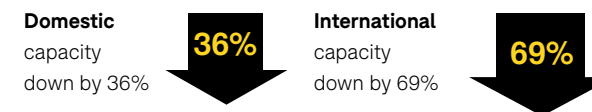
Network Key Metrics

Top 5 Airports	Seats S20	Seats vs S19	Routes
DEN	5,574,793	-2%	64
MDW	5,055,687	-11%	58
BWI	4,627,502	-3%	59
LAS	4,233,152	-7%	50
DAL	3,911,146	-13%	49

Capacity Trends



International & Domestic Capacity



KPIs

China Southern has benefitted from the recovery in domestic flying as China brought the virus under control. Over the summer capacity was down by 'only' 22% vs summer 2019, and by June 2020 the number of seats on offer was almost tracking 2019 levels. The airline has been one of several airlines to have offered promotional packages (branded 'Fly Happily' at China Southern) that let passengers book unlimited domestic flights for a specified period of time for a fixed price in an effort to boost traveller confidence and domestic travel.

	Total			Domestic			International		
	S19	S20	Change		S20	v S19		S20	v S19
Global Ranking (seats)	6	2	4	Seats per flight	176	3	Seats per flight	310	113
Routes	766	607	-159	Routes	590	3	Routes	17	-162
Seats	81,685,537	63,779,278	-22%	Seats	63,180,918	-8%	Seats	598,360	-95%
Flights	464,374	361,612	-22%	Flights	359,682	-10%	Flights	1,930	-97%

Fleet & Orders as of August 2020

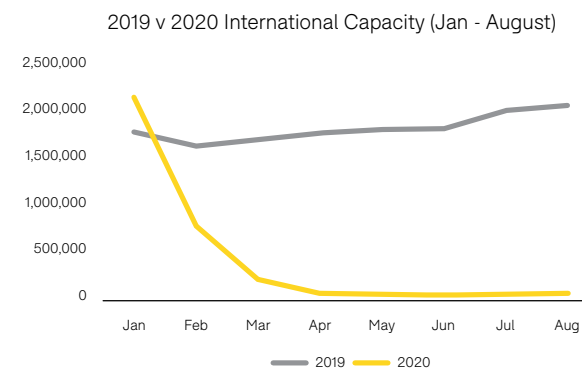
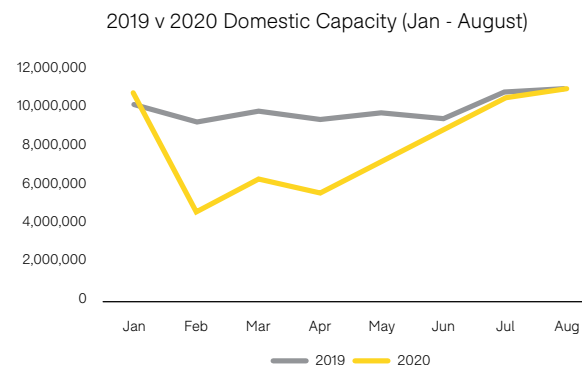
With 8% of its fleet still inactive, China Southern is making progress towards getting everything back in the air. The largest in fleet terms of the Big three Chinese carriers, it has 624 aircraft and an order book totaling a further 135 aircraft. The average age of the fleet is seven years.

Type	In service	Inactive	On Order
Narrowbody	465	46	115
Widebody	109	4	20

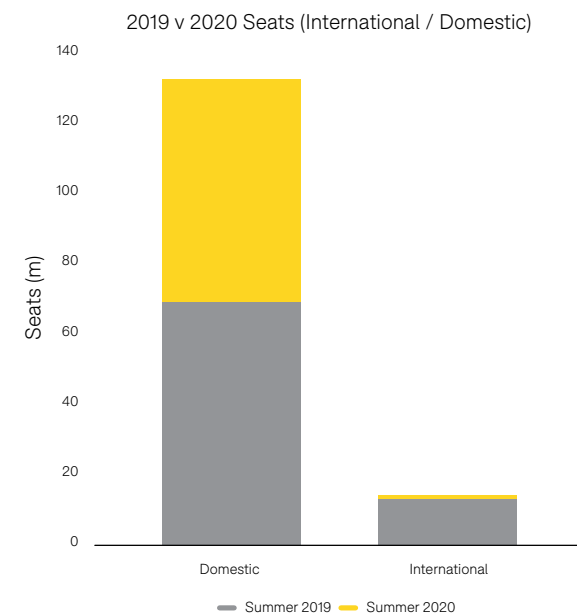
Network Key Metrics

Top 5 Airports	Seats S20	Seats vs S19	Routes
CAN	8,785,058	-29%	106
SZX	4,774,145	-9%	59
URC	2,530,576	-25%	42
WUH	2,050,798	-22%	40
PEK	1,251,232	-62%	16

Capacity Trends



International & Domestic Capacity



KPIs

China Eastern has operated 74% of the summer 2019 capacity this summer, almost all of which was on domestic routes. International flying has been severely curtailed by covid-19 and restrictions on travel put in place by the Chinese and other governments although it took until April for most international flights to cease. In contrast, domestic flying was at it's lowest in February and has been in recovery ever since, finally exceeding monthly capacity operated in 2019 in August.

	Total			Domestic			International		
	S19	S20	Change		S20	v S19		S20	v S19
Global Ranking (seats)	7	3	4	Seats per flight	161	-1	Seats per flight	253	55
Routes	858	667	-191	Routes	648	-19	Routes	19	-172
Seats	77,812,450	57,626,783	-26%	Seats	57,033,373	-10%	Seats	593,410	-96%
Flights	464,454	355,689	-23%	Flights	353,344	-10%	Flights	2,345	-97%

Fleet & Orders as of August 2020

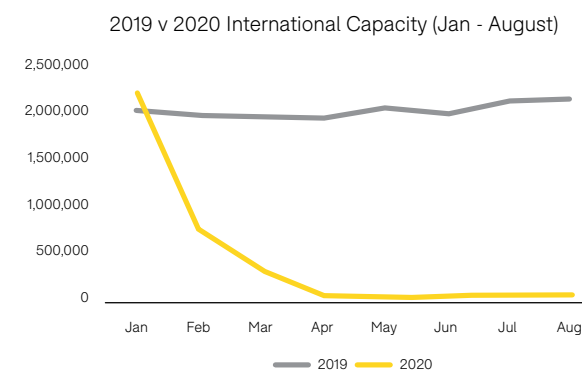
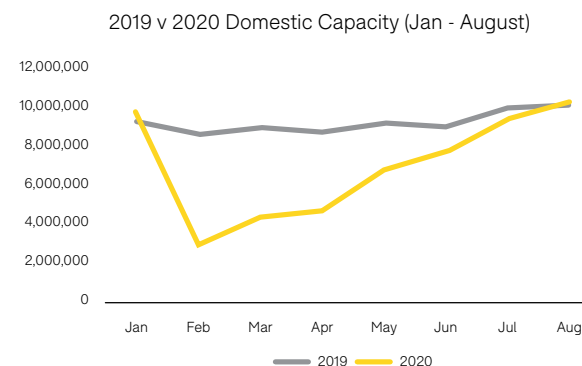
With the second largest fleet amongst the Big Chinese three, China Eastern has most of them back in the air, with just seven still inactive, which equates to 1% of its 565 strong fleet. The fleet is also relatively young, with an average age of just 7.3 years.

Type	In service	Inactive	On Order
Narrowbody	476	6	91
Widebody	82	1	18

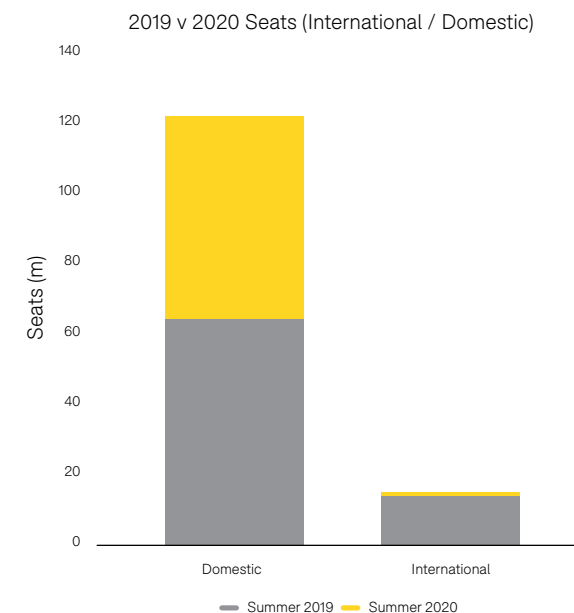
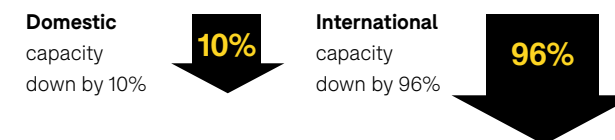
Network Key Metrics

Top 5 Airports	Seats S20	Seats vs S19	Routes
KMG	5,184,426	-30%	70
SHA	4,588,946	-26%	36
XIY	4,242,418	-16%	75
PVG	3,446,990	-31%	90
PEK	1,855,634	-57%	18

Capacity Trends



International & Domestic Capacity



As a recipient of funds under the US CARES Act, American Airlines was required to continue operating some flights through the summer. Overall, capacity was 59% below last year in summer 2020, but domestic capacity fell by only 53%, and after a low of -71% in May capacity settled at -45% in July and August. For the 6 weeks from mid March to the end of April, the airline was cancelling at short notice as many flights as it was operating as it got to grips with the schedule required, but since the start of May, cancelled flights have been minimal.

KPIs

	Total			Domestic			International		
	S19	S20	Change		S20	v S19		S20	v S19
Global Ranking (seats)	3	4	-1	Seats per flight	159	0	Seats per flight	175	-16
Routes	593	389	-204	Routes	309	-67	Routes	80	-137
Seats	108,862,093	45,004,465	-59%	Seats	40,784,426	-53%	Seats	4,220,039	-81%
Flights	662,585	281,334	-58%	Flights	257,258	-53%	Flights	24,076	-80%

Fleet & Orders as of August 2020

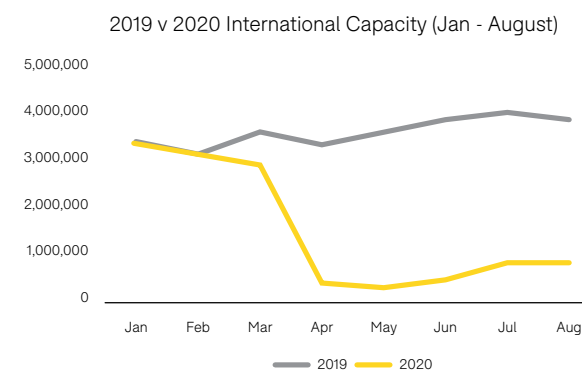
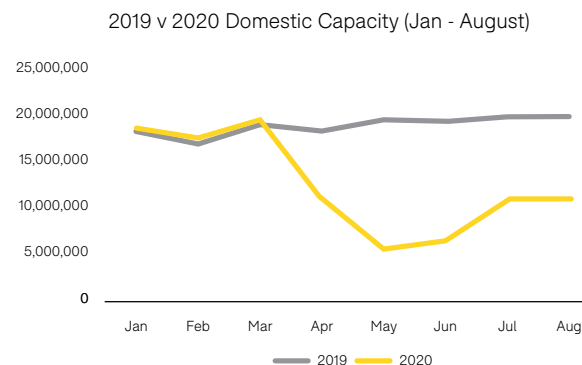
1001 aircraft in the fleet, 230 aircraft on order - predominantly narrow body aircraft. Average fleet age is 11.1 years – the youngest fleet of the big US carriers, although this is slightly below the average of the Top 20 which is 9.2 years.

Type	In service	Inactive	On Order
Narrowbody	600	254	185
Widebody	53	94	45

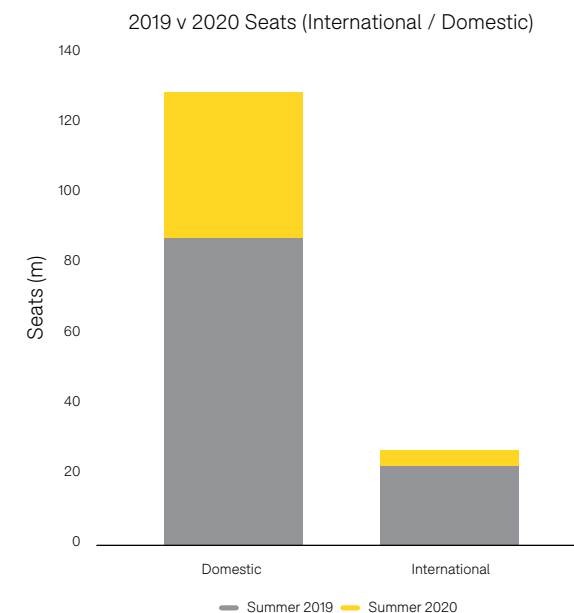
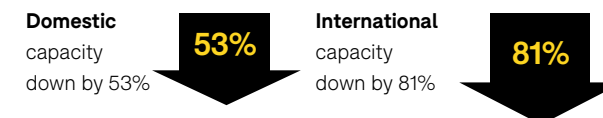
Network Key Metrics

Top 5 Airports	Seats S20	Seats vs S19	Routes
DFW	9,135,748	-48%	112
CLT	5,644,765	-45%	73
MIA	2,872,276	-66%	61
ORD	2,525,931	-64%	48
PHX	2,387,037	-57%	46

Capacity Trends



International & Domestic Capacity



KPIs

Delta Air Lines operated 64% below 2019 capacity levels this summer, with higher reductions on international routes and lower reductions in the domestic market. Delta has, however, come through the pandemic with an enhanced reputation among customers for its clear communications about action it was taking to ensure traveller safety and for the wide range of measures they implemented and others copied. Delta was often ahead of other US majors in adjusting their schedule to anticipated demand, especially in the April to June period when many airlines were slow to reduce capacity resulting in more cancelled flights.

	Total			Domestic			International		
	S19	S20	Change		S20	v S19		S20	v S19
Global Ranking (seats)	2	5	-3	Seats per flight	158	-1	Seats per flight	216	8
Routes	607	345	-262	Routes	287	-131	Routes	58	-131
Seats	113,777,805	40,412,555	-64%	Seats	37,175,224	-61%	Seats	3,237,331	-83%
Flights	686,675	250,350	-64%	Flights	235,345	-60%	Flights	15,005	-84%

Fleet & Orders as of August 2020

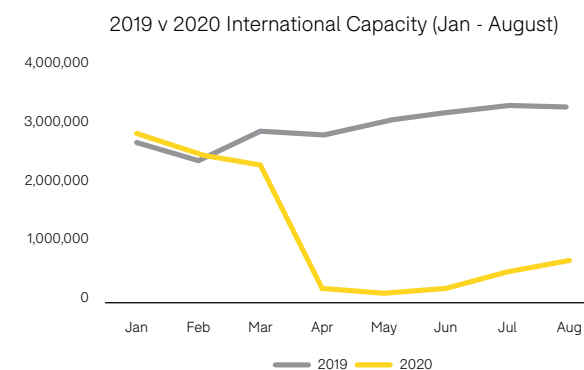
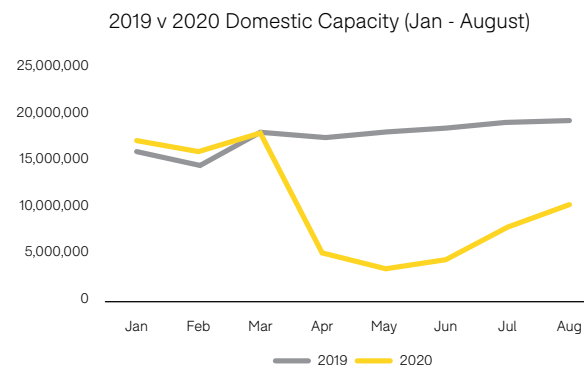
With the largest fleet amongst the Top 20 Global airlines at 1020 aircraft, Delta currently has just half operating. It still has a strong order book with 240 confirmed orders but much of this is likely headed for replacement rather than organic growth as the average fleet age is 12 years.

Type	In service	Inactive	On Order
Narrowbody	441	419	190
Widebody	67	93	50

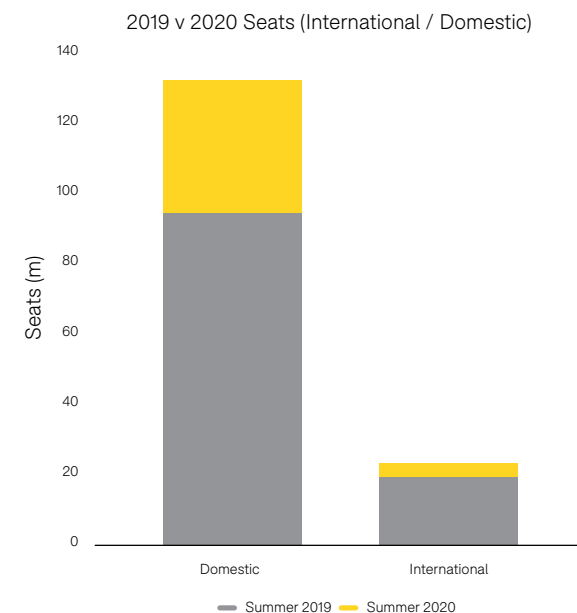
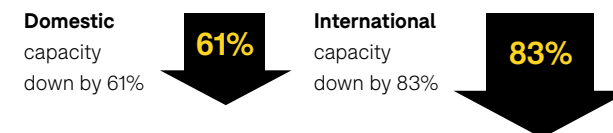
Network Key Metrics

Top 5 Airports	Seats S20	Seats vs S19	Routes
ATL	10,604,530	-35%	122
SLC	2,940,377	-23%	50
MSP	2,639,261	-48%	46
DTW	2,559,924	-39%	44
JFK	1,285,749	-52%	34

Capacity Trends



International & Domestic Capacity



Boosted by the near complete recovery of the domestic market, Air China operated 14% less domestic flights this summer compared to last year. International capacity was much more severely impacted, with just 4% of last summer's capacity operating on the carrier's international routes. Air China is cautiously beginning to restart international services as the restrictions that were applied to Beijing begin to be relaxed.

KPIs

	Total			Domestic			International		
	S19	S20	Change		S20	v S19		S20	v S19
Global Ranking (seats)	9	6	3	Seats per flight	175	-2	Seats per flight	278	45
Routes	501	413	-88	Routes	392	21	Routes	21	-109
Seats	53,928,840	36,753,292	-32%	Seats	36,283,819	-14%	Seats	469,473	-96%
Flights	289,261	209,485	-28%	Flights	207,798	-13%	Flights	1,687	-97%

Fleet & Orders as of August 2020

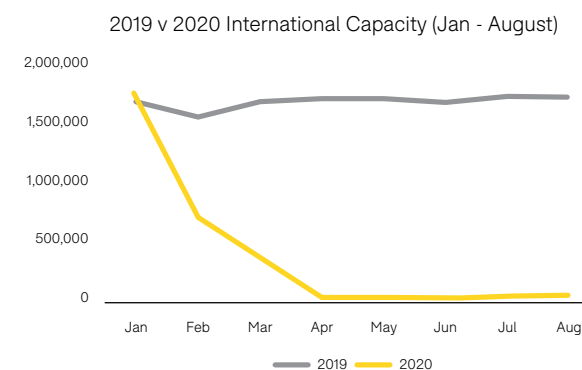
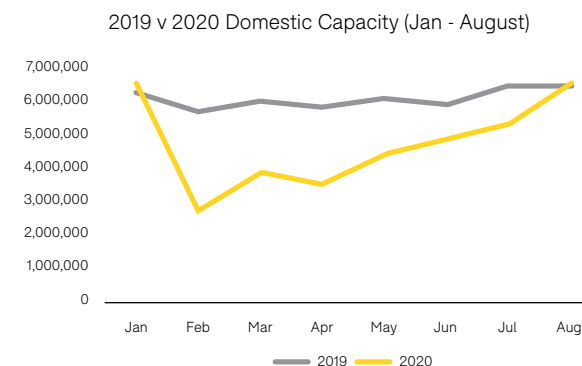
With a total fleet of 443 aircraft, just 7% of Air China's fleet is currently inactive. Their order book is still healthy too, with 95 aircraft confirmed on order. One third of these are Comac 90 seat Regional Jets, the first one of which Air China received earlier this summer. The average age of the fleet is 8.2 years.

Type	In service	Inactive	On Order
Narrowbody	299	21	74
Widebody	113	10	21

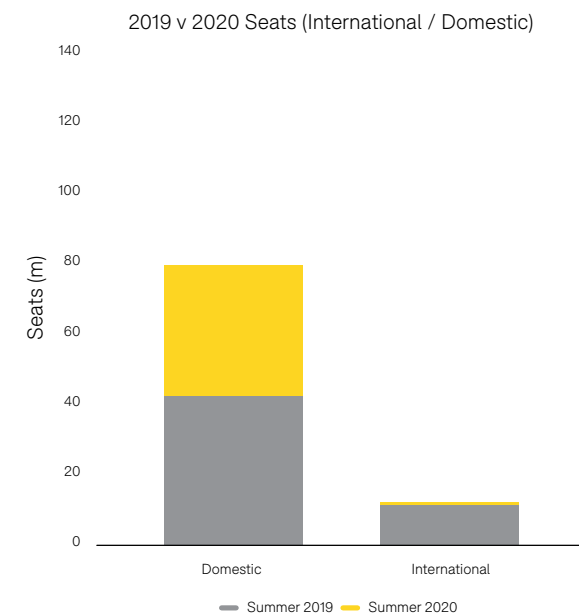
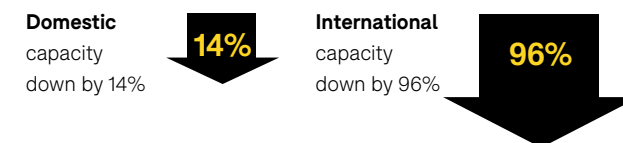
Network Key Metrics

Top 5 Airports	Seats S20	Seats vs S19	Routes
PEK	7,518,042	-47%	106
CTU	4,481,454	-4%	68
CKG	1,931,787	-9%	39
HGH	1,811,331	-2%	30
CAN	1,623,843	-5%	18

Capacity Trends



International & Domestic Capacity



Ryanair went into the pandemic with a high level of cash reserves, at least compared to many other airlines. Ryanair has a record of opposing state support for airlines but has accessed general support from the UK government such as the furlough scheme. The airline originally indicated it might cut up to 3,000 jobs as a result of the pandemic, but this has been reduced after pilots and cabin crew agreed to pay cuts and changes in work practice in order to cut costs.

KPIs

	Total			Domestic			International		
	S19	S20	Change		S20	v S19		S20	v S19
Global Ranking (seats)	4	7	-3	Seats per flight	189	0	Seats per flight	189	0
Routes	1832	902	-930	Routes	87	-58	Routes	815	-872
Seats	94,184,748	25,425,999	-73%	Seats	2,793,726	-80%	Seats	22,632,273	-72%
Flights	498,332	134,559	-73%	Flights	14,783	-80%	Flights	119,776	-72%

Fleet & Orders as of August 2020

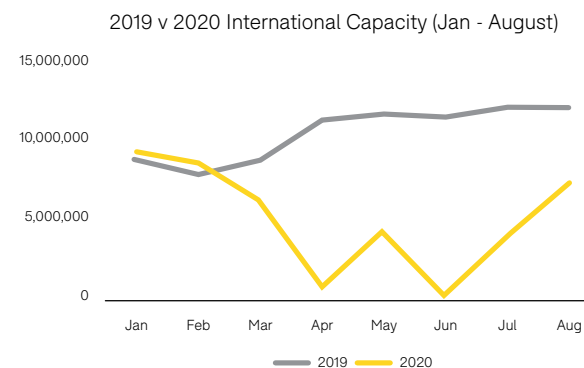
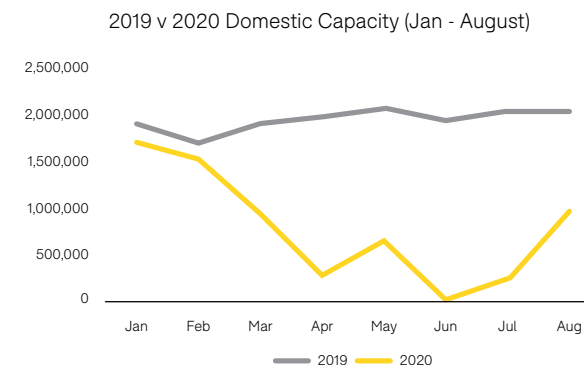
Just 6 of Ryanair's fleet of B737-800's are registered as being currently inactive however they operated 67% less flights this summer v's summer 2019. Ryanair's average fleet age is at the higher end now of its global peers, at 11 years.

Type	In service	Inactive	On Order
Narrowbody	271	6	135

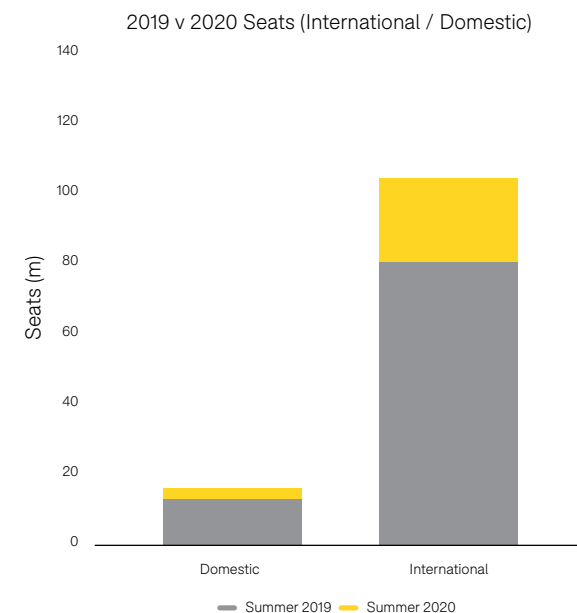
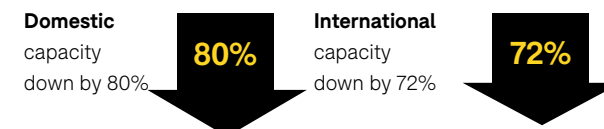
Network Key Metrics

Top 5 Airports	Seats S20	Seats vs S19	Routes
STN	1,998,540	-71%	124
DUB	1,429,371	-71%	86
BCN	888,624	-2%	50
PMI	703,773	-5%	52
BGY	476,505	-58%	38

Capacity Trends



International & Domestic Capacity



In summer 2019 78% of United Airlines capacity was international. With international air services more adversely affected than domestic services through the pandemic, United Airlines has seen its ranking for global capacity fall from fifth to eighth place. United Airlines was one of the carriers which was supported by the CARES Act, which means that the airline has operated part of its network throughout the summer. Domestic capacity fell to 81% below 2019 levels in May and June but partially recovered to 56% below 2019 by August. Recovery of international capacity has been slower with August capacity still 75% below August 2019.

KPIs

	Total			Domestic			International		
	S19	S20	Change		S20	v S19		S20	v S19
Global Ranking (seats)	5	8	-3	Seats per flight	163	-3	Seats per flight	214	13
Routes	561	302	-259	Routes	216	-128	Routes	86	-131
Seats	83,049,604	21,539,221	-74%	Seats	17,574,703	-72%	Seats	3,964,518	-81%
Flights	477,803	126,546	-74%	Flights	107,978	-71%	Flights	18,568	-82%

Fleet & Orders as of August 2020

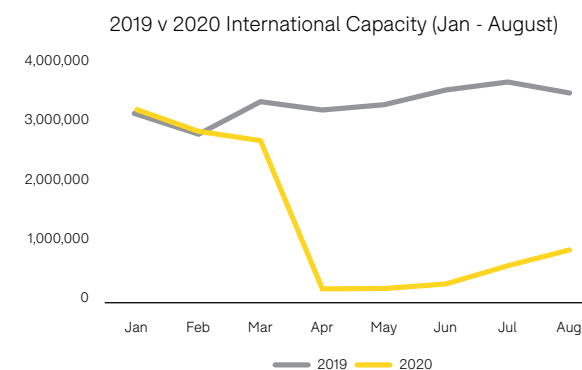
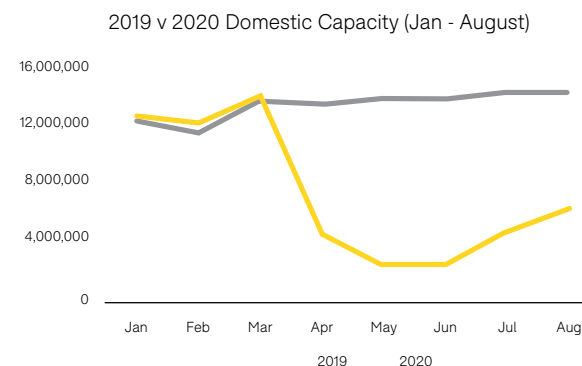
Over half of United's 859 aircraft are still inactive as the carrier grapples with how it might restart its international network. With an average fleet age of 15.2 years, many of the 300 aircraft on order will be destined for replacement rather than growth overall.

Type	In service	Inactive	On Order
Narrowbody	286	362	241
Widebody	107	104	59

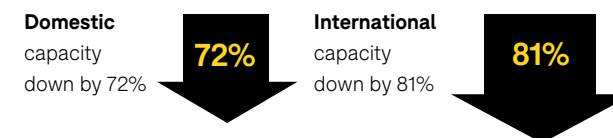
Network Key Metrics

Top 5 Airports	Seats S20	Seats vs S19	Routes
DEN	2,925,062	-24%	68
ORD	2,351,836	-46%	56
EWR	2,216,788	-51%	51
IAH	2,187,712	-41%	57
SFO	1,784,783	-54%	36

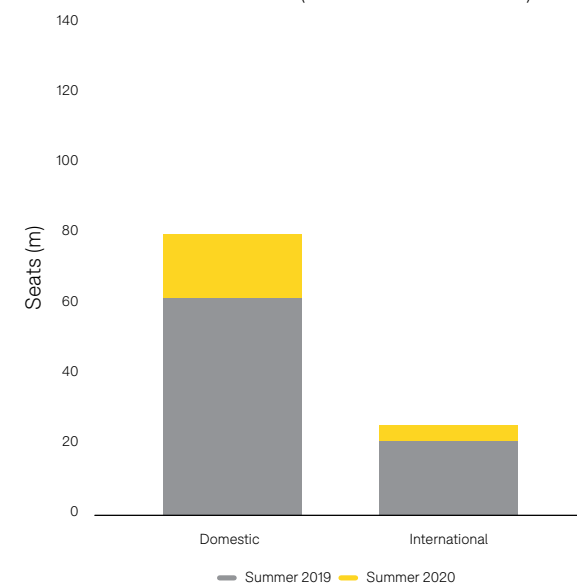
Capacity Trends



International & Domestic Capacity



2019 v 2020 Seats (International / Domestic)



KPIs

All Nippon has responded to covid-19 and the related restrictions on international travel by significantly reducing its schedule. In contrast, the domestic schedule has not seen the same degree of reduction but has been affected by a high volume of cancellations of flights scheduled to operate. Capacity through summer 2020 is down 20% on summer 2019, but that comprises a fall of 74% for international capacity combined with a reduction in domestic capacity of just 9%. Almost all tourist travel by foreigners KPIs remains barred, and business travel is only permitted by travellers of certain countries.

	Total			Domestic			International		
	S19	S20	Change		S20	v S19		S20	v S19
Global Ranking (seats)	15	9	6	Seats per flight	240	-42	Seats per flight	231	12
Routes	145	109	-36	Routes	85	1	Routes	24	-37
Seats	31,769,117	21,383,743	-33%	Seats	20,327,456	-20%	Seats	1,056,287	-84%
Flights	119,218	89,216	-25%	Flights	84,635	-5%	Flights	4,581	-85%

Fleet & Orders as of August 2020

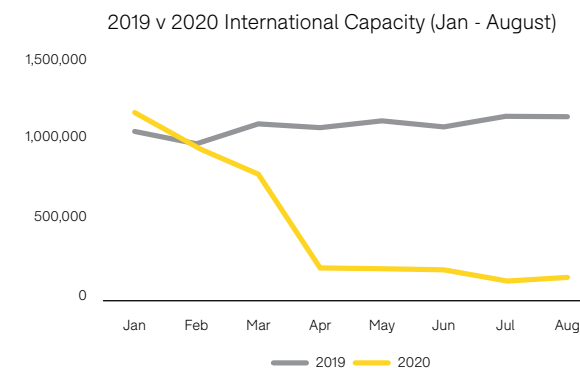
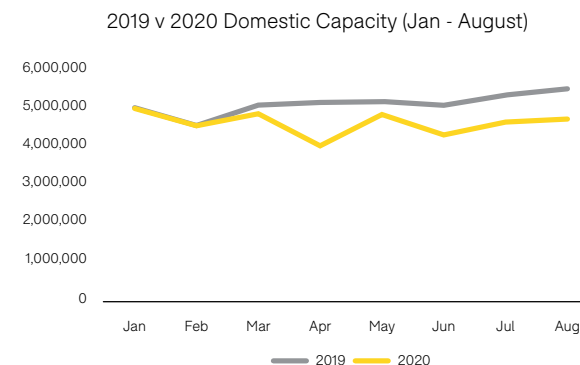
Currently one third of All Nippon's 244 aircraft fleet is inactive. With a relatively young average fleet age (8.1 years), All Nippon still has expansion plans with a total of 108 aircraft on order, although some of these orders will be for fleet replacement.

Type	In service	Inactive	On Order
Narrowbody	61	17	63
Widebody	103	63	45

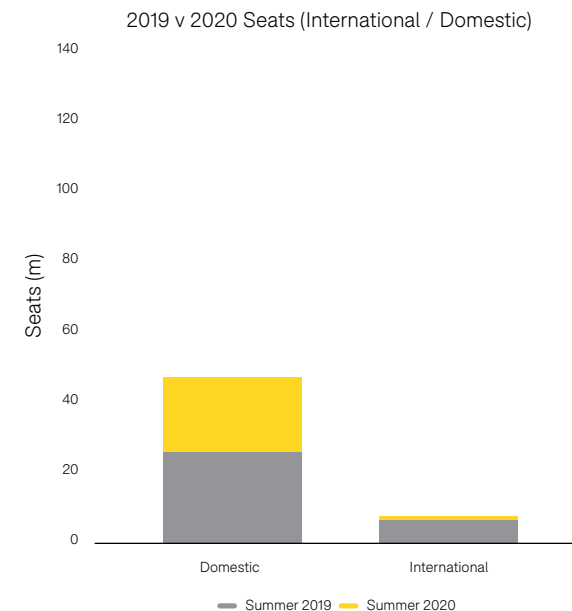
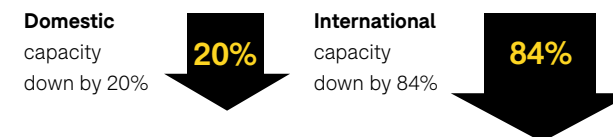
Network Key Metrics

Top 5 Airports	Seats S20	Seats vs S19	Routes
HND	8,599,487	-29%	47
ITM	1,649,911	-22%	15
CTS	1,624,880	-18%	13
OKA	1,521,613	-22%	17
FUK	1,376,878	-26%	8

Capacity Trends



International & Domestic Capacity



KPIs

IndiGo is the largest airline in India and was ranked 10th in the world for capacity in summer 2019. With most of its network serving domestic travellers in India, the airline has seen capacity recover domestically since the low point in April and May when lockdown was imposed. Restrictions on international air travel continue to impact the airline's ability to operate international services.

	Total			Domestic			International		
	S19	S20	Change		S20	v S19		S20	v S19
Global Ranking (seats)	10	10	0	Seats per flight	171	1	Seats per flight	190	6
Routes	346	284	-62	Routes	273	4	Routes	11	-66
Seats	51,141,066	21,017,134	-59%	Seats	20,669,770	-55%	Seats	347,364	-93%
Flights	298,953	122,463	-59%	Flights	120,630	-56%	Flights	1,833	-93%

Fleet & Orders as of August 2020

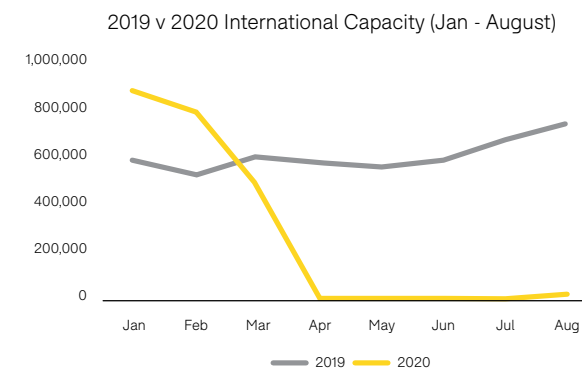
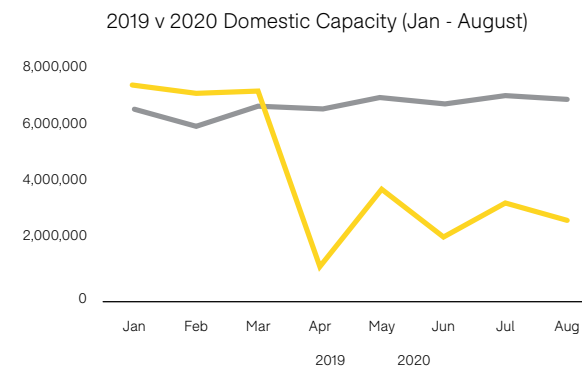
Indigo's fleet comprises narrowbodies and regional jets and currently only 12% of these are grounded, given the scale of India's domestic market. They have the largest aircraft order of the Top 20 airlines and one of the largest in the world with 377 A321neos and 217 A320neos making up most of their orderbook.

Type	In service	Inactive	On Order
Narrowbody	244	32	619

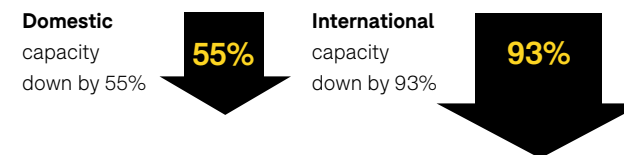
Network Key Metrics

Top 5 Airports	Seats S20	Seats vs S19	Routes
DEL	3,162,816	-55%	46
BLR	2,295,324	-58%	45
HYD	2,018,594	-2%	43
CCU	1,595,994	-10%	36
BOM	1,580,070	-10%	38

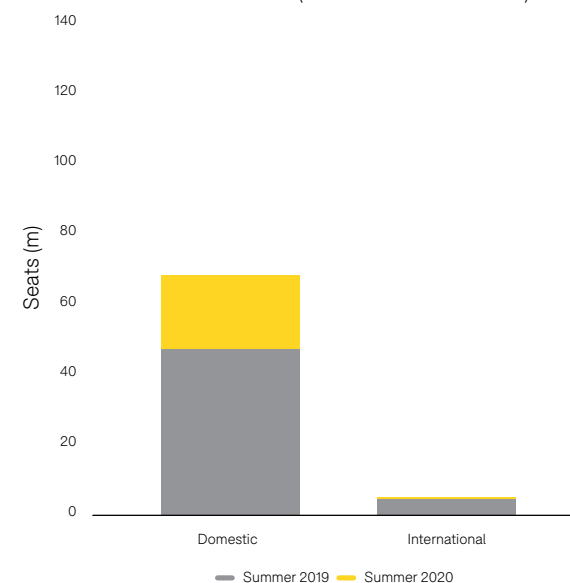
Capacity Trends



International & Domestic Capacity



2019 v 2020 Seats (International / Domestic)



11 easyJet

KPIs

easyJet grounded its fleet in late March and resumed flying in mid June. Even then, resumption of flights was slow and the carrier scaled back planned capacity as new restrictions came in such as when Spain was added to the UK's quarantine list. Overall, this summer easyJet operated only 21% of the capacity it flew in summer 2019. By August, however, the airline was operating 65% of its domestic seats and over half of international seats, compared to August 2019.

	Total			Domestic			International		
	S19	S20	Change		S20	v S19		S20	v S19
Global Ranking (seats)	8	11	-3	Seats per flight	184	13	Seats per flight	184	10
Routes	911	447	-464	Routes	78	-21	Routes	369	-443
Seats	67,667,882	15,476,024	-77%	Seats	4,101,511	-70%	Seats	11,374,513	-79%
Flights	390,062	84,010	-78%	Flights	22,331	-72%	Flights	61,679	-80%

Fleet & Orders as of August 2020

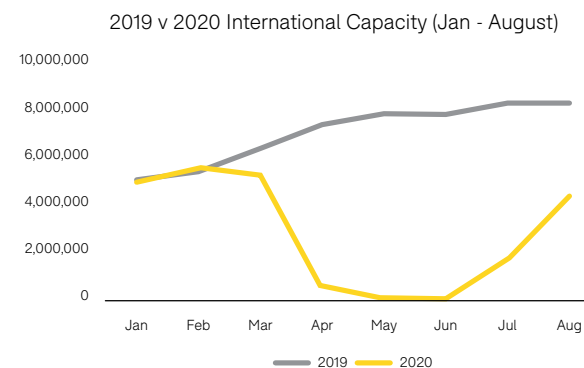
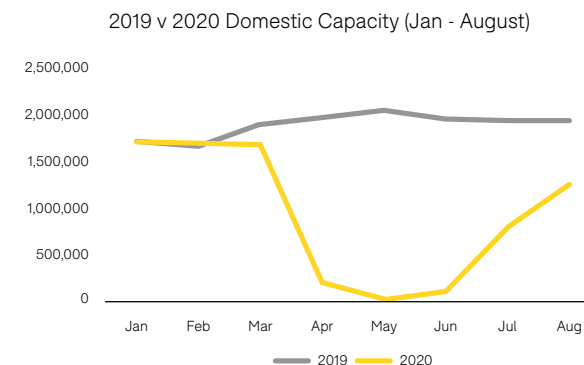
Of its fleet of 186 Airbus narrowbodies, easyJet still has 39% inactive – the majority of these are its A319s. It has 108 confirmed orders still of A320-200neo's and A321neos, with bulk deliveries of these starting from 2022 onwards. The easyJet fleet is relatively young, at just 6.6 years on average.

Type	In service	Inactive	On Order
Narrowbody	113	73	108

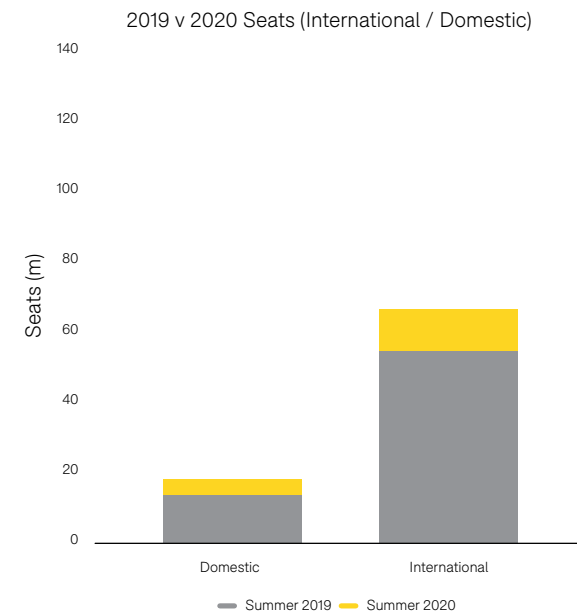
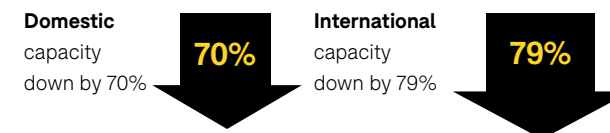
Network Key Metrics

Top 5 Airports	Seats S20	Seats vs S19	Routes
LGW	1,498,199	-78%	82
MXP	739,320	-52%	29
LTN	607,620	-48%	34
GVA	564,768	-41%	37
TXL	258,624	-63%	22

Capacity Trends



International & Domestic Capacity



KPIs

Turkish Airlines sizeable domestic network has afforded the airline some buffer through the covid-19 pandemic as domestic traffic has been quicker to show signs of recovery than international traffic. However the restrictions on international travel have resulted in a 83% reduction in capacity in summer 2020. Turkish Airlines has agreed with workers on a 50% cut in pilot wages, a 35% cut in cabin crew wages and a 30% cut in other wages through 2021 in order to reduce costs for the airline and retain jobs. The airline, which is 49% state owned, has not received any direct state support.

	Total			Domestic			International		
	S19	S20	Change		S20	v S19		S20	v S19
Global Ranking (seats)	13	12	1	Seats per flight	170	-9	Seats per flight	210	6
Routes	371	177	-194	Routes	42	-14	Routes	135	-180
Seats	45,946,060	10,489,951	-77%	Seats	4,942,003	-60%	Seats	5,547,948	-83%
Flights	233,715	55,558	-76%	Flights	29,118	-58%	Flights	26,440	-84%

Fleet & Orders as of August 2020

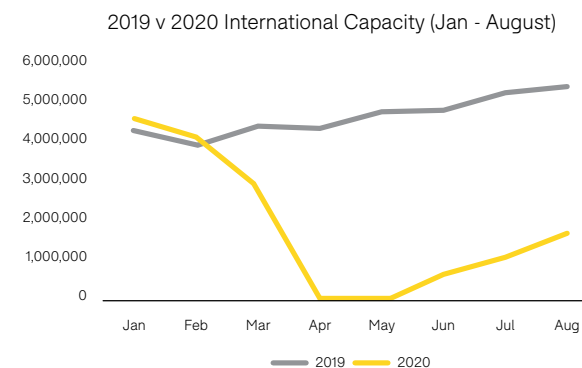
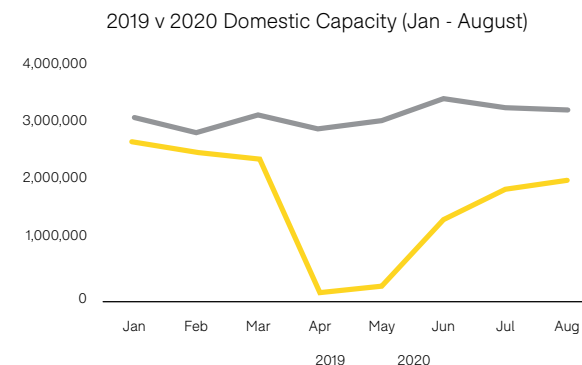
With 338 aircraft in its fleet, Turkish Airlines currently records 20% of these as inactive, spread evenly across their narrow and widebody fleets. Turkish Airlines still has a healthy order book with 172 confirmed aircraft orders.

Type	In service	Inactive	On Order
Narrowbody	178	44	134
Widebody	92	24	38

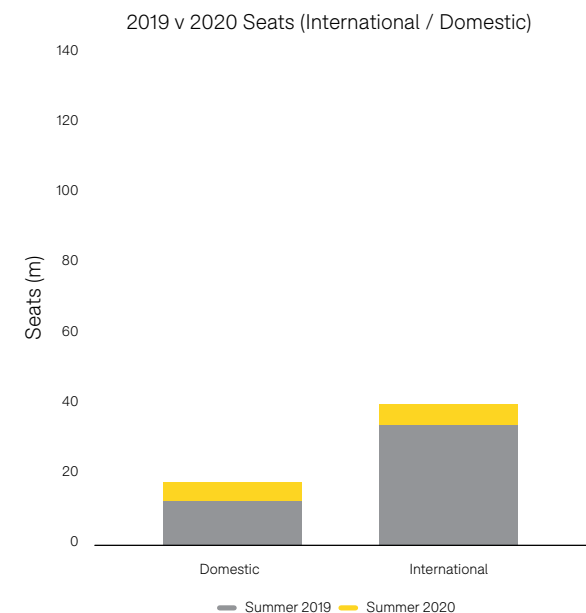
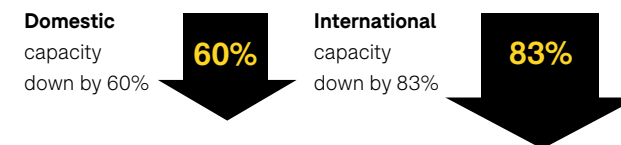
Network Key Metrics

Top 5 Airports	Seats S20	Seats vs S19	Routes
IST	4,922,737	-76%	164
AYT	237,281	-78%	4
ADB	221,993	-67%	1
ESB	214,686	-88%	2
SAW	5,967	-97%	1

Capacity Trends



International & Domestic Capacity



KPIs

With a significant proportion of its pre-covid network serving domestic markets, Japan Airlines has been aided by the strong response of Japan to the pandemic and recovery in domestic travel. To preserve cash, the airline has amended plans by slowing delivery of new widebody aircraft intended for use at Tokyo Haneda Airport, and has reassigned widebody passenger aircraft to cargo services. Plans to launch a long haul low cost airline from Tokyo, Zipair in May, were also postponed. Through the pandemic, Japan Airlines has managed its schedule with a low-level of cancellations.

	Total			Domestic			International		
	S19	S20	Change		S20	v S19		S20	v S19
Global Ranking (seats)	18	13	5	Seats per flight	229	-2	Seats per flight	215	5
Routes	100	66	-34	Routes	40	-4	Routes	26	-30
Seats	27,001,337	10,255,480	-62%	Seats	9,558,903	-53%	Seats	696,577	-89%
Flights	120,009	45,063	-62%	Flights	41,824	-53%	Flights	3,239	-89%

Fleet & Orders as of August 2020

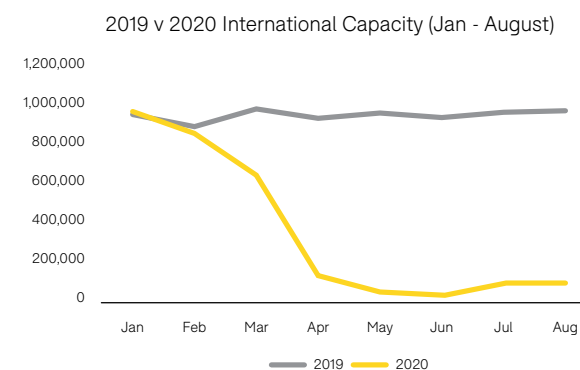
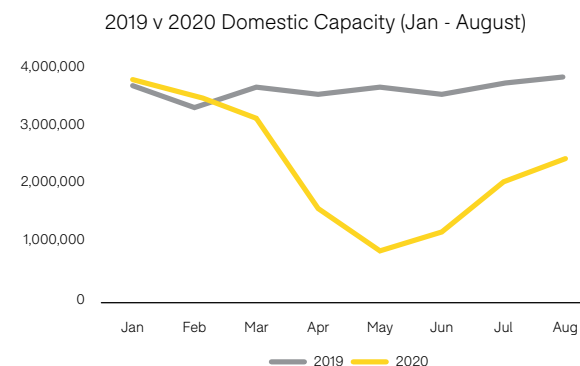
With just over half of their fleet of 241 aircraft still inactive, Japan Airlines is making a cautious recovery but continues to be hampered by international restrictions on travel. Japan Airlines widebody order is for 12 more A350-900 XWBs and 13 A350-1000 XWBs.

Type	In service	Inactive	On Order
Narrowbody	27	23	32
Widebody	56	65	25

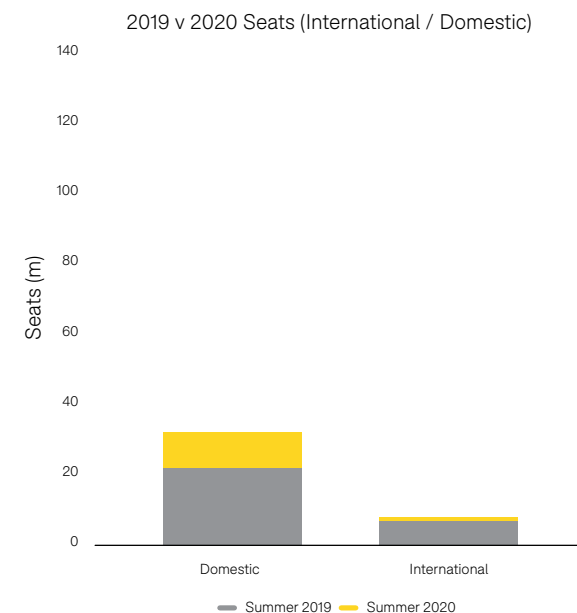
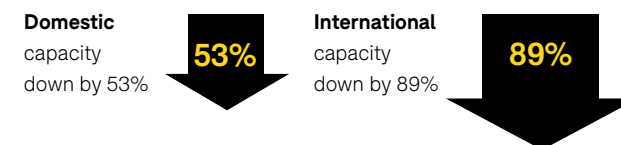
Network Key Metrics

Top 5 Airports	Seats S20	Seats vs S19	Routes
HND	4,434,751	-57%	40
CTS	833,214	-14%	6
ITM	756,670	-14%	6
FUK	674,365	0%	3
NRT	160,757	-63%	13

Capacity Trends



International & Domestic Capacity



KPIs

Air France started the year with capacity well ahead of 2019 levels, especially in the domestic market, but almost stopped flying in April and May. However, domestic capacity has continued to recover well and by August seats were only 17% below August 2019 levels. International capacity has also recovered through the summer and in August was at 45% of the 2019 level. Air France has received substantial state aid but this has been with some, albeit not very challenging, stipulations about improved environmental performance.

	Total			Domestic			International		
	S19	S20	Change		S20	v S19		S20	v S19
Global Ranking (seats)	16	14	2	Seats per flight	165	-4	Seats per flight	203	-15
Routes	194	172	-22	Routes	39	3	Routes	133	-25
Seats	30,054,925	10,085,292	-66%	Seats	3,756,301	-54%	Seats	6,328,991	-71%
Flights	148,669	53,897	-64%	Flights	22,706	-53%	Flights	31,191	-69%

Fleet & Orders as of August 2020

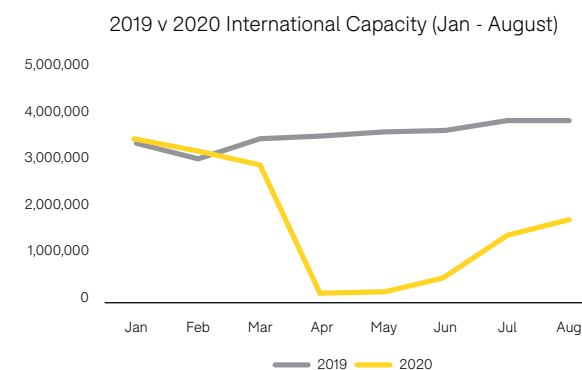
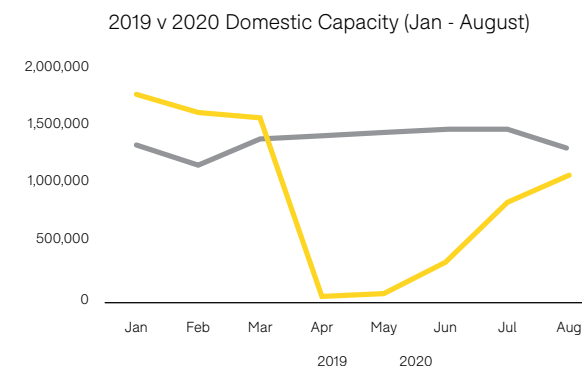
With 229 aircraft in the fleet, Air France has seen 22% of those parked up during the pandemic. The carrier has also moved its A380 fleet into long term storage and these aircraft seem unlikely to come back into active service. With an average fleet age of 11.6 years, the 32 A350-900 XWB's will replace some of the lost capacity offered by the A380 fleet.

Type	In service	Inactive	On Order
Narrowbody	102	13	-
Widebody	77	37	32

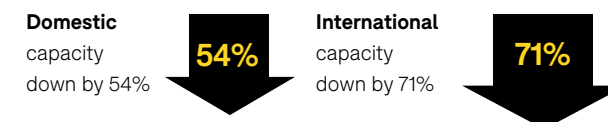
Network Key Metrics

Top 5 Airports	Seats S20	Seats vs S19	Routes
IST	3,783,229	-67%	117
AYT	776,870	-73%	21
ADB	477,313	-48%	5
ESB	290,534	-66%	3
SAW	281,807	-53%	5

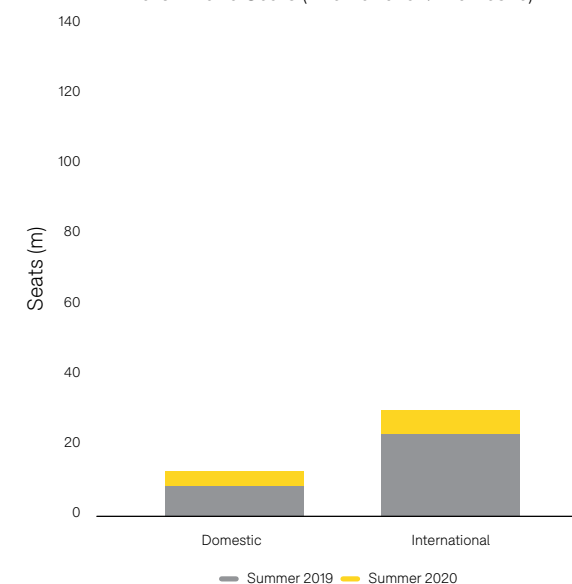
Capacity Trends



International & Domestic Capacity



2019 v 2020 Seats (International / Domestic)



15 Alaska

KPIs

Alaska Airlines has seen summer 2020 capacity drop by 64% compared to summer 2019 but has been making a steady recovery since May. While international capacity also appears to be recovering, it only makes up a very small proportion of the airlines' overall capacity. Overall the airline emerges from the summer with its global ranking for capacity up by four from 19th place to 15th place. The airline has been praised for its response to the coronavirus with a number of passenger friendly policies.

	Total			Domestic			International		
	S19	S20	Change		S20	v S19		S20	v S19
Global Ranking (seats)	19	15	4	Seats per flight	165	5	Seats per flight	164	4
Routes	193	134	-59	Routes	117	-55	Routes	17	-4
Seats	26,276,442	9,493,838	-64%	Seats	8,995,999	-64%	Seats	497,839	-54%
Flights	164,983	57,707	-65%	Flights	54,680	-65%	Flights	3,027	-55%

Fleet & Orders as of August 2020

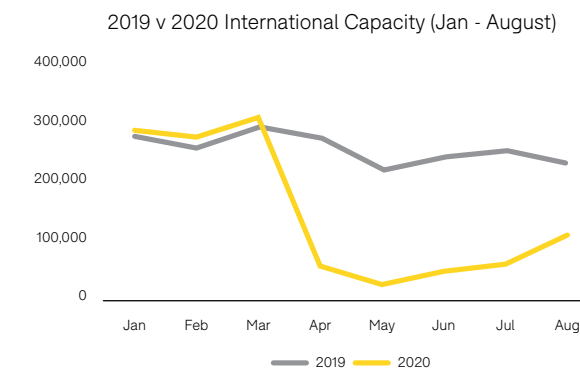
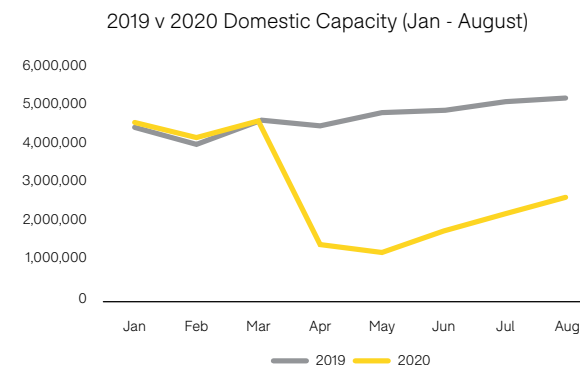
With its entirely narrowbody fleet of 235 A320's and B737's, Alaska Airlines currently has 60% of them operating with the others inactive. It has a further 62 confirmed aircraft orders. The average age of its fleet is at the lower end, at just 8.4 years.

Type	In service	Inactive	On Order
Narrowbody	141	94	62

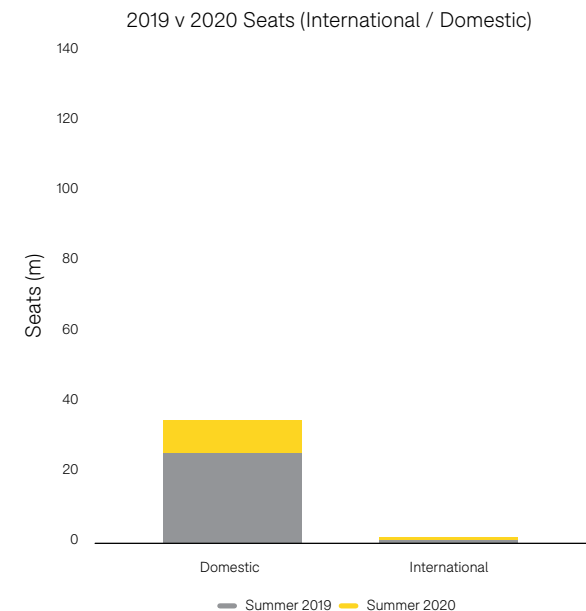
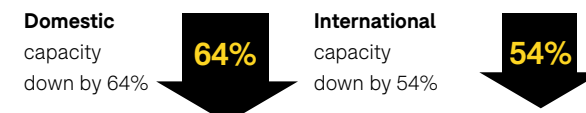
Network Key Metrics

Top 5 Airports	Seats S20	Seats vs S19	Routes
SEA	3,266,812	-53%	60
ANC	855,126	-60%	17
LAX	511,000	-76%	15
PDX	343,175	-80%	15
SFO	275,375	-82%	10

Capacity Trends



International & Domestic Capacity



With the Russian Federation one of the few countries seeing almost near domestic market recovery, Aeroflot is well positioned to weather the pandemic. This is reflected in their move up the Top 20 ranking from 17th to 16th. They are currently operating 57 domestic routes, just one below the number operated in summer 2019. Like many carriers their international route network is still impacted by ongoing geographic restrictions. Aeroflot received state support in the form of five year loans in June 2020 to the value of 790.6m Euros and will issue up to 1.7bn new shares in October 2020 which will raise additional funds.

KPIs

	Total			Domestic			International		
	S19	S20	Change		S20	v S19		S20	v S19
Global Ranking (seats)	17	16	1	Seats per flight	145	-1	Seats per flight	191	13
Routes	161	76	-85	Routes	57	1	Routes	19	-86
Seats	27,899,227	8,808,241	-68%	Seats	7,328,728	-40%	Seats	1,479,513	-91%
Flights	171,698	58,182	-66%	Flights	50,429	-39%	Flights	7,753	-91%

Fleet & Orders as of August 2020

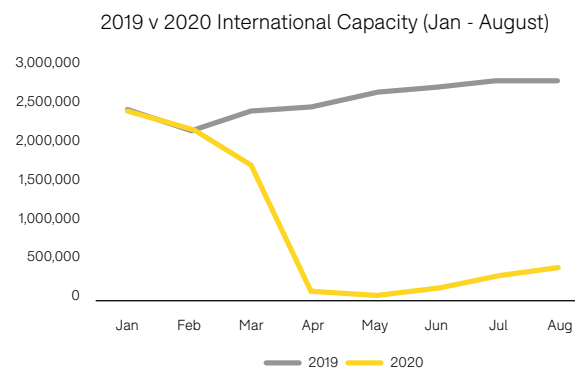
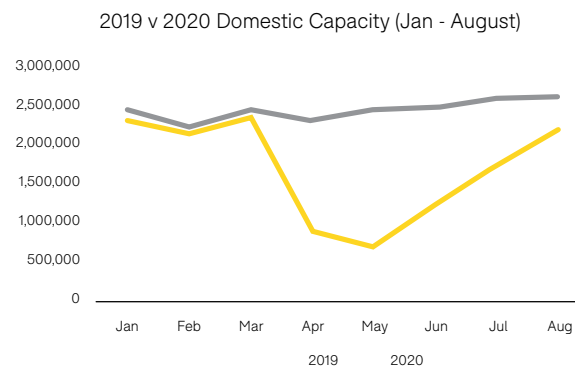
With a total fleet of 300, and order book of 98, Aeroflot has a predominantly narrowbody fleet. Currently 40% of the Aeroflot widebody fleet is inactive with 37% of narrowbodies also on the ground. Aircraft orders for widebodies sit at 50 reflecting the Aeroflot group's recent 2028 strategy which will see the carrier focus shift to long haul aircraft going forward.

Type	In service	Inactive	On Order
Narrowbody	113	42	50
Widebody	27	11	24

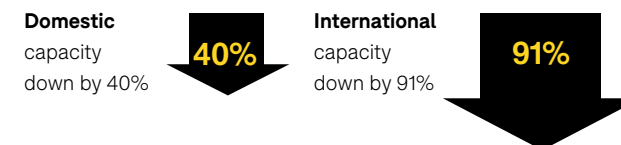
Network Key Metrics

Top 5 Airports	Seats S20	Seats vs S19	Routes
SVO	4,317,674	-69%	75
SIP	318,084	-51%	2
LED	304,640	-24%	1
AER	275,589	-25%	2
SVX	125,852	-57%	1

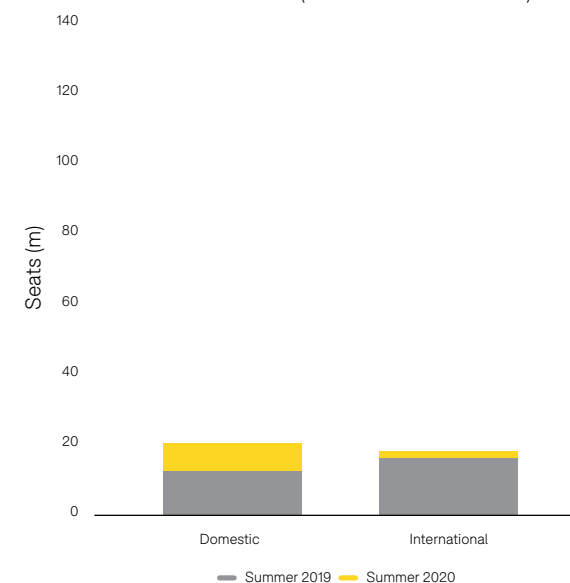
Capacity Trends



International & Domestic Capacity



2019 v 2020 Seats (International / Domestic)



Germany approved a package of measures in May 2020 which included loans of up to €9 billion for Lufthansa and Lufthansa Group has been in talks with the governments of Austria, Switzerland, Italy and Belgium about mitigation measures. In June the Group laid out plans for 22,000 redundancies of a total workforce of 130,000. In capacity terms, Lufthansa operated just 16% of summer 2019 levels and has dropped from 12th place globally by seat volume to 17th.

KPIs

	Total			Domestic			International		
	S19	S20	Change		S20	v S19		S20	v S19
Global Ranking (seats)	12	17	-5	Seats per flight	159	-13	Seats per flight	184	-16
Routes	266	137	-129	Routes	14	-8	Routes	123	-121
Seats	46,658,847	7,127,485	-85%	Seats	1,355,065	-86%	Seats	5,772,420	-84%
Flights	240,403	39,842	-83%	Flights	8,500	-85%	Flights	31,342	-83%

Fleet & Orders as of August 2020

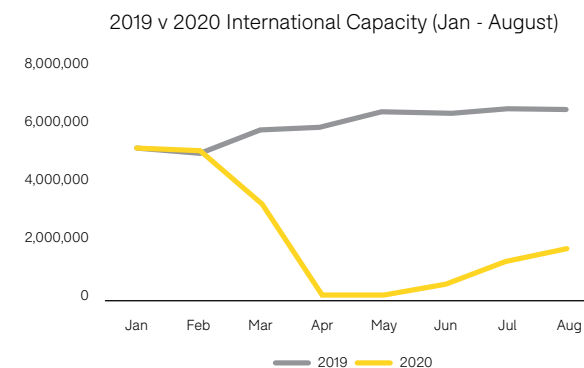
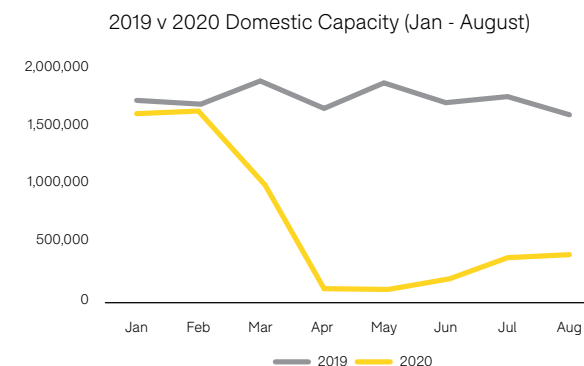
Over half of Lufthansa's 308 fleet of aircraft are still registered as inactive. Worst affected of the Top 20, Lufthansa is impacted by its hub and spoke operations being severely limited by the ongoing international restrictions. Lufthansa has also sent its 14 A380s into long term storage and they are unlikely to return.

Type	In service	Inactive	On Order
Narrowbody	83	113	93
Widebody	40	72	67

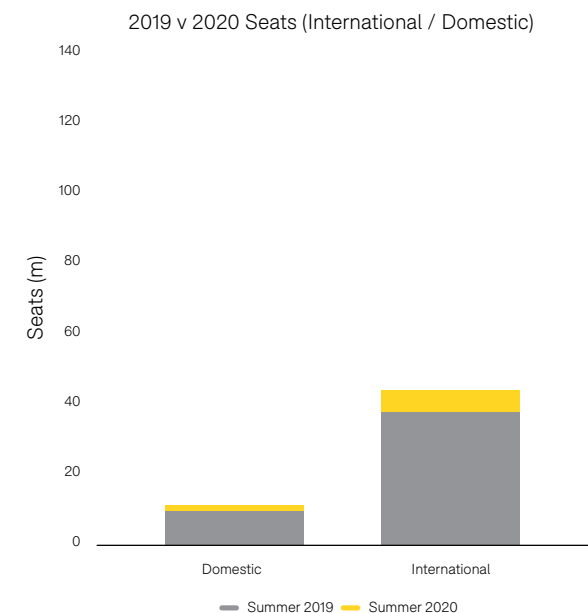
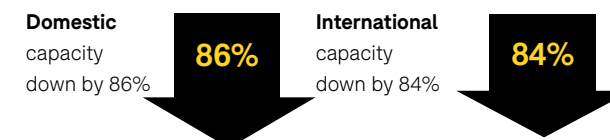
Network Key Metrics

Top 5 Airports	Seats S20	Seats vs S19	Routes
FRA	2,629,385	-83%	95
MUC	849,221	-90%	42
HAM	223,834	0%	2
TXL	209,179	0%	2
LHR	161,685	0%	2

Capacity Trends



International & Domestic Capacity



LATAM filed for bankruptcy protection in May 2020 and still needs to secure financing to enable it to emerge from bankruptcy protection. In summer 2020 domestic capacity was 83% below summer 2019 levels, and international capacity was 95% below. While capacity has been growing slowly, particularly, domestic capacity, load factors remain well below pre-covid levels. In September 2020 the Brazilian authorities approved a LATAM-Delta Air Lines joint venture.

	Total			Domestic			International		
	S19	S20	Change		S20	v S19		S20	v S19
Global Ranking (seats)	11	18	-7	Seats per flight	164	-3	Seats per flight	261	53
Routes	619	257	-362	Routes	228	-178	Routes	29	-184
Seats	47,446,504	6,810,760	-86%	Seats	6,311,054	-83%	Seats	499,706	-95%
Flights	271,947	40,391	-85%	Flights	38,473	-83%	Flights	1,918	-96%

Fleet & Orders as of August 2020

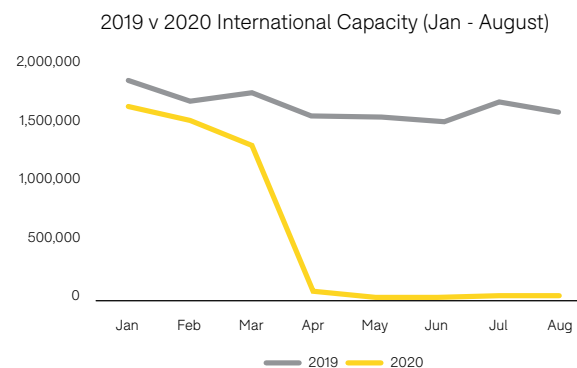
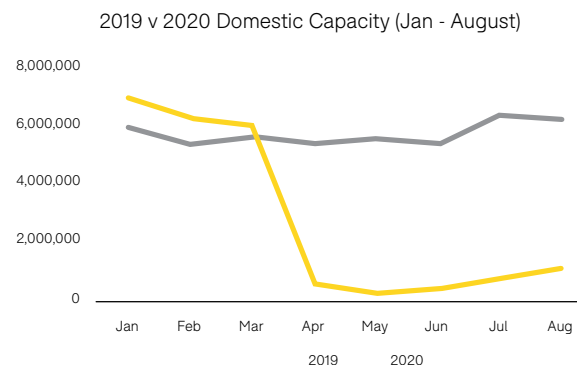
Just over half of LATAM's fleet is currently inactive, spread evenly across it's widebody and narrowbody fleet. LATAM's current bankruptcy status means its future order books will be under review as the groups grapples with rightsizing the airline going forward.

Type	In service	Inactive	On Order
Narrowbody	115	117	42
Widebody	41	41	9

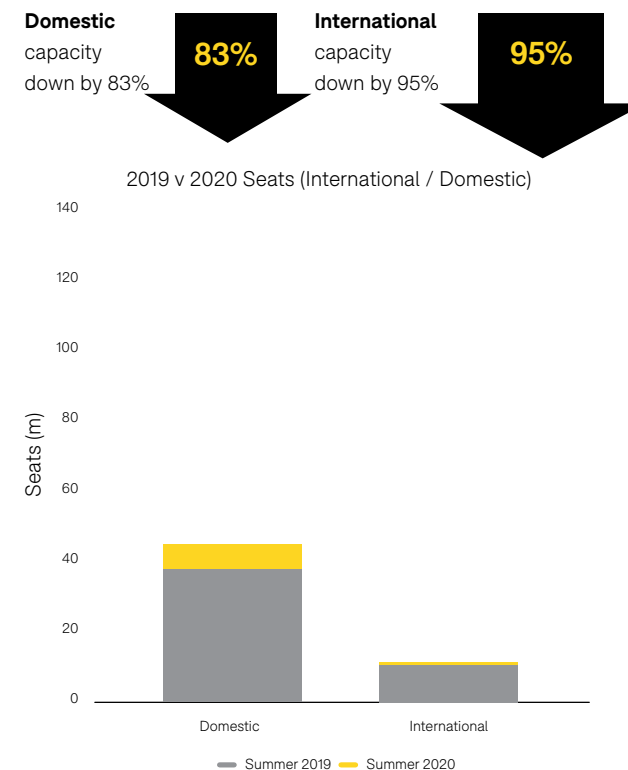
Network Key Metrics

Top 5 Airports	Seats S20	Seats vs S19	Routes
GRU	1,680,126	-72%	47
BSB	653,371	-75%	30
SCL	430,026	-87%	21
LIM	358,637	-92%	13
SDU	286,914	-70%	5

Capacity Trends



International & Domestic Capacity



KPIs

With much of the British Airways network focussed on international routes, the airline has been hard hit by travel restrictions and quarantine rules imposed by governments. In early April British Airways consolidated its London flying at Heathrow's Terminal 5 but has now started to return some flights to London Gatwick although the resumption of short haul flights from Gatwick, due to resume in September 2020, has been delayed again, possibly until March 2021. The airline has accessed UK government coronavirus loans via parent group IAG.

	Total			Domestic			International		
	S19	S20	Change		S20	v S19		S20	v S19
Global Ranking (seats)	14	19	-5	Seats per flight	149	-4	Seats per flight	189	-4
Routes	223	122	-101	Routes	9	-2	Routes	113	-99
Seats	33,501,786	5,702,932	-83%	Seats	620,577	-83%	Seats	5,082,355	-83%
Flights	178,132	31,055	-83%	Flights	4,157	-82%	Flights	26,898	-83%

Fleet & Orders as of August 2020

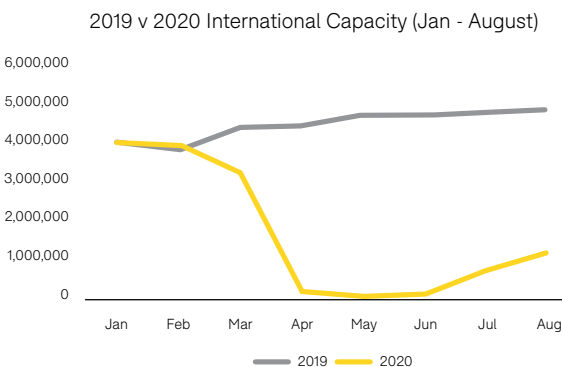
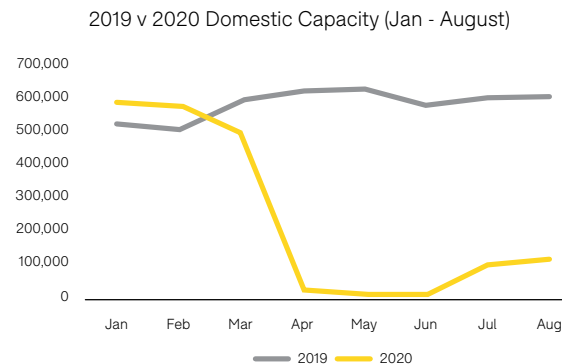
With 35% of it's fleet grounded, BA is another of the Global Top 20 who have parked up their A380 fleet – all 12 of them. The carrier has also retired the long serving B747's and has a mix of A350-1000 XWBs (12) and B777-9Xs (18) as part of its confirmed order book. The average age of BA's fleet is 11.3 years.

Type	In service	Inactive	On Order
Narrowbody	90	57	13
Widebody	75	31	43

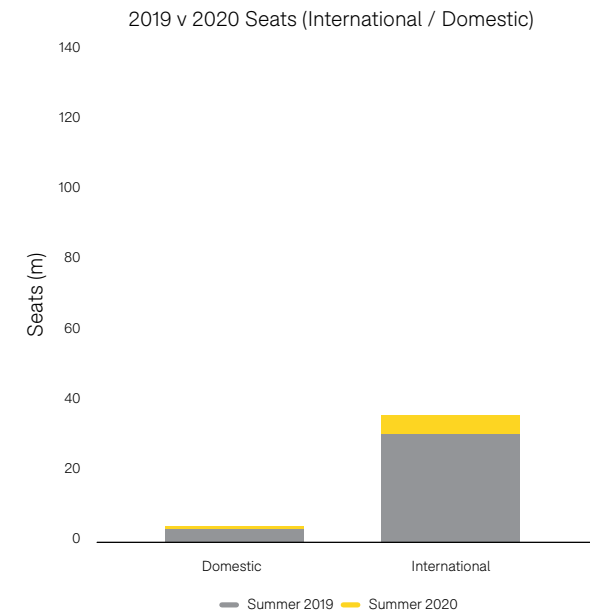
Network Key Metrics

Top 5 Airports	Seats S20	Seats vs S19	Routes
LHR	2,672,310	-24%	115
JFK	69,734	-67%	1
EDI	68,075	-50%	1
LGW	55,714	-92%	5
GLA	55,185	-50%	1

Capacity Trends



International & Domestic Capacity



With just two thirds of their network currently operating compared to last summer, Air Canada has been significantly impacted by the pandemic. The carrier scheduled 4.7m seats over summer 2020 compared to summer 2019, a 78% reduction. 20,000 employees have been laid off, amounting to more than 50% of the workforce. Despite requests, the Canadian government has not made sector specific aid available to airlines; Air Canada has threatened to cancel some aircraft orders, including the Quebec made A220, if the government does not support the industry.

	Total			Domestic			International		
	S19	S20	Change		S20	v S19		S20	v S19
Global Ranking (seats)	20	20	0	Seats per flight	142	-15	Seats per flight	191	18
Routes	141	71	-70	Routes	28	-5	Routes	43	-65
Seats	21,629,351	4,729,572	-78%	Seats	2,856,623	-68%	Seats	1,872,949	-85%
Flights	130,697	30,001	-77%	Flights	20,179	-64%	Flights	9,822	-87%

Fleet & Orders as of August 2020

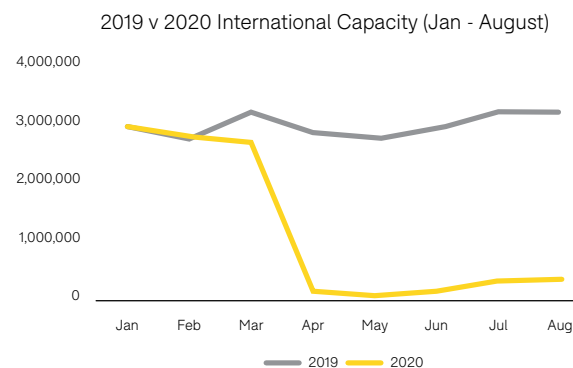
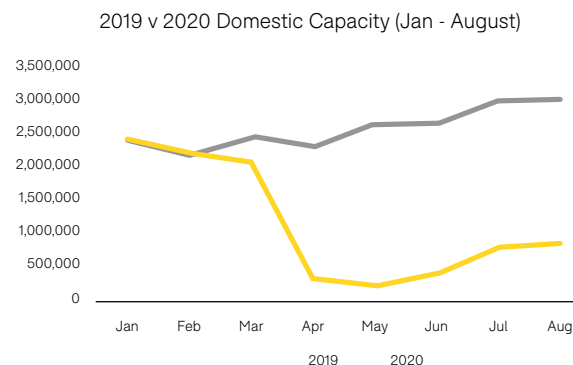
With a total fleet of 248 aircraft, 60% of these are currently inactive. A greater proportion of narrowbodies are inactive than widebodies. It has 26 narrowbody aircraft on order, all B737-800's, and a further order of 36 regional jets, all A220's.

Type	In service	Inactive	On Order
Narrowbody	46	51	63
Widebody	51	30	-

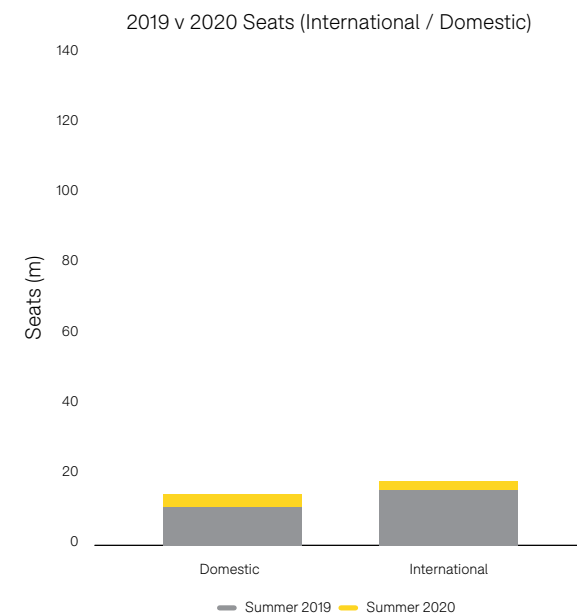
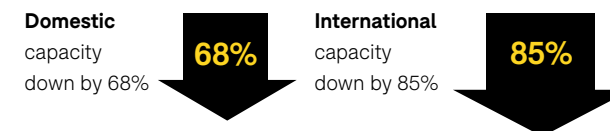
Network Key Metrics

Top 5 Airports	Seats S20	Seats vs S19	Routes
YYZ	1,425,928	-78%	40
YVR	782,204	-74%	14
YUL	623,999	-73%	19
YYC	327,665	-71%	4
YOW	126,039	-82%	3

Capacity Trends



International & Domestic Capacity



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