

EUROCONTROL Data Snapshot

The recovery of airline activity from COVID-19 can depend greatly on whether flights or seats are considered. This is linked to fleet evolution.



19 December 2023

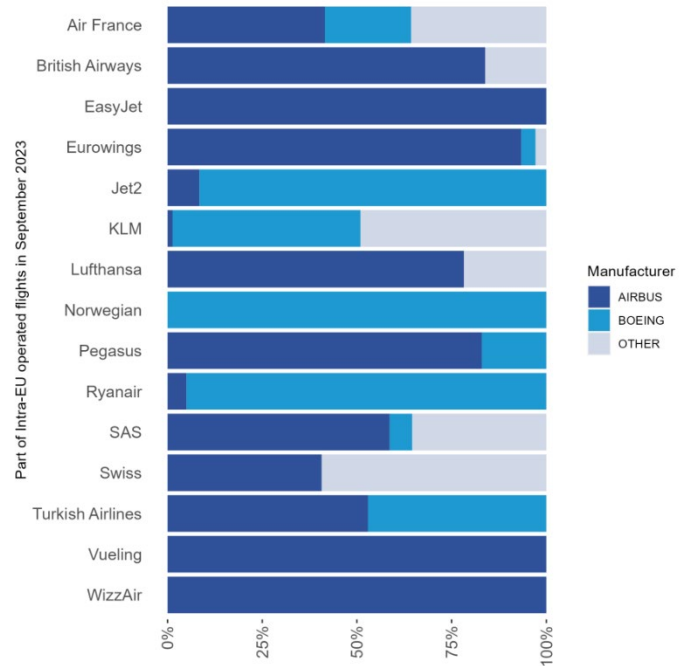
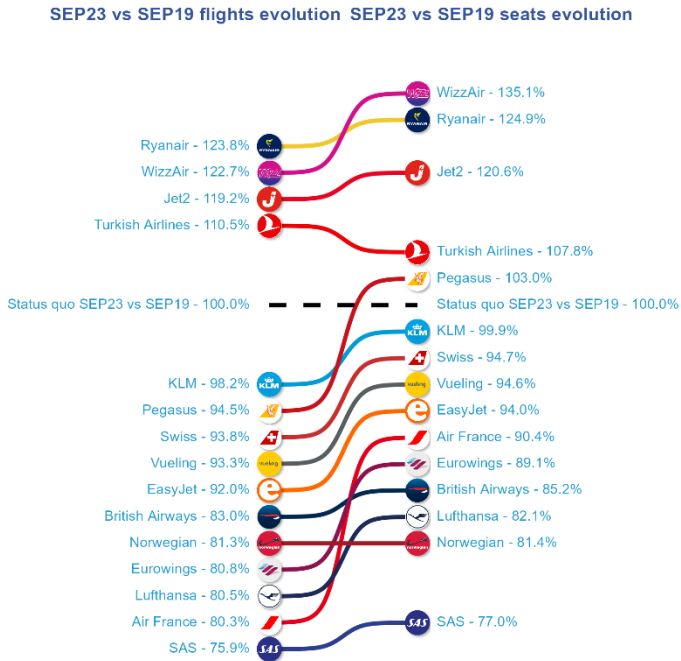


Figure 1 – Between 2019 and 2023, most airlines have seen a lower capacity recovery in terms of flights (left) than in terms of seats (right) Figure 2 - Operators who densified their cabins operate a significant number of Airbus aircraft

From the latest 7-year forecast 2023-2029, we expect the EUROCONTROL network to reach 2019 traffic levels in terms of flights in 2025. But if we look at the number of seats that were offered, some aircraft operators are performing much more strongly.

Zooming on traffic intra-Europe and comparing the number of flights operated in September 2013 with those in 2019, for the 15 largest airlines (grouped at Level 1¹), we can capture well the full set of deliveries that have happened to date. By selecting September, we avoid the dataset being influenced by additional capacity chartered in July and August, which would alter the view on the operators’ fleet strategies.

We found that approximately 25% of these airlines are operating more flights than in 2019, while the rest are operating at or below pre-pandemic levels.

The proportion of aircraft operators operating above their 2019 levels is slightly higher (33%) if we look at seats, but we can identify different paths in terms of cabin density which drive the changes in ranking, moving from flight growth to seat growth.

Four companies have a significantly higher increase in seats than in flights. WizzAir, Pegasus, Air France and Eurowings all increased seat density on intra-European flights by at least 9%. We have been able to identify the increase of new Airbus models as a significant contributing factor to the density increase in the fleets of these 4 operators. This generally helps to reduce unit costs, provided that load factors can be sustained.

Almost all the other airlines operated seat densities in 2023 that were quite similar to those operated in 2019. However, Turkish Airlines is an exception, with a seat density decrease of 2.4%, directly linked to the airline moving to 737 MAX 8 aircraft configured in 2-classes and limited to 151 seats.

¹ See <https://www.eurocontrol.int/directory/airline-groups-lookup> for info about how EUROCONTROL classifies airline groups.

