

Seat capacity on intra-European flights has grown by over a third in the past 10 years. More seats are being flown on narrowbodies and large RJs. Trends in aircraft deployment on European routes are examined here.

The development of the trans-European market, & fleet development strategies

Annual seat capacity on intra-European routes has increased by one-third over the past decade. From 2004 to 2013, there was the rapid expansion of low-cost carriers (LCCs) in Europe, and the growing use of new generation large regional jets (RJs), including the CRJ-900, CRJ-1000 and Embraer's E-Jet family, comprising the E-170, E-175, E-190 and E-195.

These new 70- to 130-seat RJs promised overall costs in cents per available seat-mile (CASM) that were as competitive as, or in some cases lower than, those of narrowbody jetliners. They would fill the gap between existing

regional aircraft and the smallest narrowbodies, and allow carriers to right-size: replacing narrowbodies on routes that had lower demand and traffic volumes, with a more appropriately-sized aircraft. It was also argued that their smaller capacity and lower costs would make large RJs a less risky alternative to narrowbodies for developing new routes, or unproven markets from secondary airports.

This analysis will identify fleet deployment trends on routes in Europe over the past 10 years. Annual capacity data from 2004 and 2013 is compared. Fleet data from December 2004 and January 2014 is also considered.

Intra-European capacity

Capacity data for all flights between countries within Europe have been considered (but not for flights originating from, and terminating in, Russia). Not all these countries are members of the European Union (EU). The geographical boundary stretches from Iceland in the North-West to Spain and Portugal in the South-West, and across to Turkey in the South-East, and up to the western borders of Russia in the North-East.

In 2013 there were 833 million seats available on intra-European flights (see table, page 8). While this is an increase of 33.5% since 2004, the number of flights only rose by 7.6%. Airlines have therefore been using larger aircraft on many intra-European services, confirmed by an increase in average seat capacity from 110 in 2004 to 136 in 2013.

Aircraft deployed in Europe are subdivided between regional aircraft, narrowbodies and widebodies.

In 2004 regional aircraft accounted for 23% of seats flown. Narrowbodies provided the most seats, with 74% of capacity, and widebodies just 3%.

By 2013, the share of seats provided by narrowbodies had grown to 82%. Regional and widebody aircraft saw their shares of intra-European capacity fall to 17% and 1%.



LCCs have added narrowbody capacity on intra-European routes since 2004. Most LCC fleets are based around A320 family and 737-800 aircraft.

INTRA-EUROPEAN CAPACITY 2004 - 2013

Aircraft Category	2004			2013			Capacity change		
	Seats	Flights	Av Seats	Seats	Flights	Av Seats	Seats	Flights	Av Seats
Small Prop	212,560	13,547	16	333,432	27,954	12	56.86%	106.35%	-4
Turboprop	61,196,606	1,268,859	48	54,454,198	947,805	57	-11.02%	-25.30%	9
RJ	81,562,096	1,162,103	70	89,104,606	1,018,388	87	9.25%	-12.37%	17
All Regional	142,971,262	2,444,509	58	143,892,236	1,994,147	72	0.64%	-18.42%	14
Narrowbody	460,855,149	3,164,174	146	679,802,558	4,089,569	166	47.51%	29.25%	21
Widebody	20,281,180	77,397	262	9,690,787	34,731	279	-52.22%	-55.13%	17
Total	624,107,591	5,686,080	110	833,385,581	6,118,447	136	33.53%	7.60%	26

Regional aircraft

In 2013 nearly 144 million seats on intra-European services were provided by regional aircraft (see table, this page), an increase of only 0.64% from 2004.

Regional aircraft operated 18% fewer flights in 2013 than in 2004, implying an increase in average aircraft size. Average seat numbers rose by 14 to 72 in 2013.

Regional aircraft are subdivided as follows: small props, turboprops and RJs.

Most regional aircraft capacity is provided by turboprops and RJs. By 2013 the number of regional seats provided by turboprops had fallen by 5% to 38%.

Over the same period, seats provided by RJs increased by nearly 5% to almost 62% of all regional capacity. Together with almost zero growth in total regional seat capacity, this indicates that new RJs have replaced turboprops or older RJs on some services.

Small Props

In this analysis small props are categorised as piston-engined aircraft that fly scheduled passenger services. They provided only 333,000 seats on intra-European flights in 2013, less than 1% of total regional seat numbers (see table, this page). This was provided by the Britten-Norman Islander and Trislander, operating in remote communities.

Turboprops

In 2013, more than 54 million seats were provided by turboprops on intra-European services, 38% of the regional aircraft total (see table, this page). This represents an 11% reduction in seats since 2004.

The average number of seats on turboprop services was 57 in 2013, nine more than in 2004.

Analysis of capacity by aircraft type shows the increasing use of larger 70-seat

turboprops. More seats were offered by the larger ATR72 and Q400 in 2013 than in 2004. The capacity offered by smaller turboprops, like the Fokker 50, Saab 340, Do328, EMB-120 Brasilia and Jetstream 31, fell over the past decade.

Flybe and Flybe Finland provided the most capacity of all turboprop services in 2013, with a combined capacity of more than nine million seats. Flybe operated the Q400s, while its Finnish subsidiary operated ATR42s and ATR72s.

Wideroe, Olympic Air, Tyrolean Airways and NAYSA all provided more than two million seats each on intra-European turboprop services in 2013.

RJs

About 89 million seats were provided on RJs on intra-European flights in 2013, 62% of all regional seat capacity (see table, this page). This is an increase of 9% since 2004. RJs are only one of two aircraft categories to provide an increase in seat numbers. Average RJ size increased by 17 seats to 87 by 2013.

The capacity data emphasise the shift to new-generation 70- to 130-seat RJs from older, larger types such as the Fokker 100. It also highlights a reduction in the use of 50-seat RJs. In 2004 the Fokker 100, CRJ-100/-200, Avro RJ100 and ERJ-145 provided most RJ seats. By 2013 this had changed to the E-190, E-195 and CRJ-900.

Lufthansa CityLine had the most RJ capacity on intra-European services in 2013. It provided nearly 12.5 million seats, 14% of the overall total, with CRJ-700s, CRJ-900s, E-190s and E-195s.

HOP, KLM Cityhopper, and FlyBE each offered more than five million seats on intra-European RJ flights in 2013.

Narrowbodies

Narrowbodies range from the smallest members of the DC-9, 737 and

A320 families, up to the 757-300.

Narrowbodies provided the largest increase in intra-European capacity from 2004 to 2013. In 2013, narrowbodies accounted for nearly 680 million seats on intra-European flights, about 82% of all capacity (see table, this page), and a 48% increase from 2004, showing narrowbodies' dominance over this period. They are the only other category of aircraft to have increased capacity from 2004 to 2013. Average narrowbody size increased from 146 to 166.

The A320 and 737-800 provided most narrowbody seats in 2013. Seat numbers provided by older types, such as the 737-300 and MD-80s, declined.

In 2004 the largest providers of intra-European capacity were the full-service flag carriers: Air France, Iberia and Lufthansa. By 2013 Ryanair, with its fleet of 737-800s, and easyJet with its A319s and A320s, were providing the most narrowbody seats in Europe. This emphasises the significant growth of LCCs in Europe since 2004.

Widebodies

Widebody utilisation has had the largest reduction in intra-European seat capacity over the past 10 years. In 2013 about 9.7 million seats were offered on widebodies, only 1% of intra-European capacity. This is 52% less than in 2004 (see table, this page). The average aircraft size on widebody services increased from 262 to 279 from 2004 to 2013.

The A330 and 767 provided the most widebody capacity in 2013, replacing large numbers of A300s and A310s.

In 2013, British Airways (BA) and Turkish Airlines provided the most widebody capacity, with 767s, A330s, A340s and 777-300ERs, but most European flag carriers have substantially reduced their widebody capacity. Many have replaced A300s and A310s with narrowbodies.



Airline strategies

The fleet and capacity data of some of the largest airlines in Europe were analysed to provide insight into intra-European fleet development strategies. Airlines fall into four categories: LCC, full service, regional and charter.

LCCs

European LCCs generally build fleets around narrowbodies, and operate point-to-point route networks. Since 2004, they have grown their fleets and capacity. The three largest LCCs in terms of seat capacity in 2013 were Ryanair, easyJet and Norwegian, each of which has built up fleets of new, larger narrowbodies.

In 2004 Ryanair had a fleet of 77 aircraft. Although most of these were new 737-800s, it was still operating 11 older 737-200s. By January 2014, Ryanair had a fleet of 298 737-800s.

easyJet had a fleet of 92 aircraft in 2004, which included similar-sized 737-300/-700s and A319s. By 2014 the airline, and its Swiss subsidiary, had a fleet of 218 A319s and A320s.

Norwegian operated 12 737-300s in 2004. Most have been supplemented by 73 737-800s.

Other European LCCs, like Vueling and Wizz Air, began operations with A320s and have larger fleets. Vueling operates 70 aircraft, including 66 A320s and four A319s. Wizz Air and its subsidiary Wizz Air Ukraine have 45 A320s.

Most European LCCs have expanded to offer intra-European services. easyJet, and Wizz both established subsidiaries outside their home markets, with easyJet

Switzerland and Wizz Air Ukraine.

By 2013, the number of European countries served by Ryanair had increased by 13 to 28. It has added routes to countries that have joined the EU since 2004, including Poland, Hungary and Lithuania.

Ryanair also has bases across Europe. In 2013 it offered domestic services in France, Italy, Greece, Portugal and Spain.

easyJet, Norwegian, Vueling and Wizz have also developed bases outside of their home markets, and increased the number of European countries served by their route networks, including the new Eastern European entrants to the EU.

European LCCs have looked further afield for new demand as their route networks have developed. There has been a gradual trend for them to operate longer sectors in search of new markets.

There are no new-generation 70- to 130-seat RJs in service with European LCCs. Embraer believes that this has the potential to change. "There has been large expansion among European LCCs over the past 10 years, but the rate is slowing down," claims Claudio Camelier, vice president of market intelligence at Embraer Commercial Aviation. "Most markets are now served, so future opportunities will lie in medium- and low-demand markets. These routes may be more suited to 70- to 130-seat RJs."

Full service

Most full-service airlines are flag carriers, operating hub-and-spoke networks, with some short-haul point-to-point services, using a mix of widebody, narrowbody, and regional aircraft in their mainline fleets.

Many full service airlines have increased narrowbody capacity on intra-European services. Some have replaced older widebodies with large narrowbodies, such as the A321.

Reduction in widebodies

Most full-service airlines have reduced or eliminated their widebody capacity.

BA, Iberia and TAP all reduced the capacity provided by widebodies during the period. KLM, Lufthansa and Air France did not operate widebodies on any flights in Europe during 2013.

In general, narrowbodies have replaced widebodies, in some cases with a corresponding rise in service frequency.

Lufthansa had more than 4.5 million seats on intra-European services in 2004, using A300s. By 2013 it was no longer using widebodies in Europe, and had replaced them with large narrowbodies.

Lufthansa extensively used A300s on its domestic services between Germany's four main cities. In 2013 it operated these routes at increased frequencies with A319s, A320 and A321s.

Between 2004 and 2013 TAP replaced A310s from Lisbon with higher-frequency services using A320 family types.

BA provided the most intra-European seats on widebodies in 2013 using 767s. This was still a 26% reduction in widebody capacity since 2004.

An exception was Turkish Airlines. As it established its Istanbul (IST) hub and experienced high growth rates, it grew its widebody capacity by 80% from 2004 to 2013 to almost two million seats. Younger A330s have replaced A310s.

Intra-European narrowbodies

Since 2004, Lufthansa, Scandinavian Airlines (SAS), Turkish Airlines, BA, Aer Lingus and KLM have increased capacity on intra-European narrowbody services.

Turkish Airlines saw the largest growth in narrowbody capacity over the past 10 years, while Lufthansa offered the most narrowbody seats in 2013.

Air France, Alitalia and Iberia all reduced their intra-European narrowbody capacity from 2004 to 2013, but increased the average narrowbody size on intra-European services.

Similar developments have taken place in Lufthansa's, Air France's and BA's narrowbody fleets over the past 10 years. Smaller 737-300s and -500s have been replaced by A320 family types. BA has replaced its 757s with A321s.

SAS has replaced MD-80s, and 737-400s and -500s with 737-700s, A319s and larger 737-800s, A320s and A321s.

Turkish Airlines has replaced 737-

400s with A319s, 737-800s, -900s, A320s and A321s.

KLM has removed 737-300s and -400s from its fleet, and added next generation 737-700s, -800s and -900s.

Aer Lingus standardised on the A320 family, after removing 737-400s and -500s.

Air France, SAS, Iberia and Alitalia all reduced their narrowbody fleets. Iberia established Iberia Express to operate some of its short-haul network.

Most of the larger full-service airlines in Europe use narrowbodies to feed hubs and for point-to-point services. BA, for example, operates narrowbody flights to LHR to feed its long-haul network, but also operates point-to-point business and leisure routes from LGW.

RJs in mainline fleets

Some full-service airlines incorporate regional aircraft into their mainline fleet to provide capacity on hub-feeder routes. Others outsource this function to regional subsidiary airlines or franchise partners.

In 2013 SAS and LOT Polish airlines both operated regional aircraft as part of their mainline fleets. From 2004 to 2013 SAS replaced Q400s and Fokker 50s with CRJ-900s. It also operates a small number of ATR72s and CRJ-100/-200s. During the same period LOT built up its fleet of RJs from six E-170s, to 10 E-170s, 12 E-175s and six E-195s.

All but one of SAS's CRJ-900 routes

served Copenhagen (CPH), suggesting that its strategy is to use them on hub-feeder services. Most of the larger markets served from CPH, such as LHR, CDG, FRA and AMS, had regular narrowbody services, as well as RJ flights.

Other destinations were mainly served by RJs. This indicates that the CRJ-900s are used on high-demand markets at off-peak times, and on lower demand routes.

Some of the highest-frequency CRJ-900 destinations from CPH in 2013 were Vilnius in Lithuania, Dusseldorf, Warsaw, and Stuttgart. There is evidence that the CRJ-900 replaced narrowbodies and turboprops on these routes. In 2004 the routes were served by a mix of MD-80s and Q400s. SAS may have right-sized with 90-seat CRJ-900s, whose capacity is between the MD-80 and Q400.

Embraer believes there is the potential for 'right-sizing' from narrowbodies to 70- to 130-seat RJs in the intra-European market. "About 3,000 intra-European routes are served exclusively by narrowbodies," claims Camelier. "About 54% of these are served with less than one daily frequency and 58% depart with fewer than 130 passengers. These routes might be better suited to aircraft with lower capacity than narrowbodies."

LOT has replaced 737-300, -400 and -500 capacity on its intra-European network with E-170s, E-175s and E-190s.

The 737s are still used on high-demand routes, such as from WAW to LHR, Madrid and Kiev. However, the E-

Jets dominate the rest of the network.

Many of the E-Jet routes serve WAW, indicating that the primary use is as a hub feeder. They are also used for point-to-point services from regional Polish airports, such as those linking Wrocław, Krakow and Gdansk with FRA.

Tyrolean Airways now operates all of Austrian Airways' European flights, including widebody, narrowbody and regional services. It has developed its regional fleet since 2004 by adding additional Q400s and Fokker 100s, and removing Dash 8-300s and CRJ-100/-200s.

Swiss International Airlines (Swiss) and Turkish Airlines operated regional aircraft as part of their mainline fleets in 2004, but had removed them by 2013.

Turkish Airlines has replaced Avro RJ70s and RJ100s on domestic services within Turkey with 737-700s and -800s.

In 2004 Swiss had Saab 340 and 2000 turboprops and ERJ-145s, Avro RJ85s and Avro RJ100s in its mainline fleet. These had been removed by 2013.

Some of the capacity previously provided by regional aircraft has been replaced by large narrowbodies, such as the A320, on lower-frequency operations. Other capacity is still provided by Avro RJs, although these are now operated by Swiss's regional subsidiary Swiss European Airlines.

Lufthansa, BA and Air France have no regional aircraft in their mainline fleets.



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Regional

Regional airlines in Europe can be classified as independent or as regional subsidiaries of full-service carriers. Independent airlines often have franchise agreements with full-service carriers.

Lufthansa CityLine, Eurowings and Air Dolomiti are all regional subsidiaries of Lufthansa Group.

HOP, CityJet and KLM Cityhopper are the regional subsidiaries of Air France-KLM. BA Cityflyer, Swiss European and Alitalia Cityliner are all regional offshoots of their respective parent airlines. Wideroe is a wholly-owned subsidiary of SAS.

Aer Arann, Air Nostrum and Sun-Air Scandinavia are independent carriers that provide branded regional services under franchise agreements with Aer Lingus, Iberia and BA respectively. Through the Flybe Finland joint venture it signed with Finnair, Flybe operates contracted flying for the Finnish flag carrier across Europe.

The route networks of regional airlines operating as full-service subsidiaries often focus on providing feeder services to hub airports. Some of these regional airlines also operate point-to-point routes. CityJet is a good example, providing feed to Air France's CDG hub, but also operating point-to-point services from London City airport.

BA is a rarity among full-service carriers in Europe, because it does not use its regional subsidiary to provide hub-feeder flights. BA CityFlyer provides point-to-point services from LCY, while BA uses narrowbodies to feed LHR.

Outside of any franchise agreements, the route networks of independent regional airlines are generally based on point-to-point demand.

FlyBe, including FlyBe Finland, provided the most intra-European capacity on regional aircraft in 2013 with more than 16 million seats. It operates a combined fleet of turboprops and RJs.

Turboprop trends

FlyBe was the largest provider of turboprop capacity in 2013. In general it used turboprops on shorter sectors than the RJs. Turboprops' fuel burn advantage is most pronounced on shorter sectors.

FlyBe increased its Q400 fleet from 15 to 43 aircraft from 2004 to 2014, and phased out smaller Dash 8-300s. The Flybe Finland fleet includes two ATR42s and 12 ATR72s.

The Q400s are mainly used on point-to-point services from UK regional airports, such as Southampton, Belfast City and Birmingham. The Flybe Finland ATRs are used on services from Helsinki, probably in a hub-feeder role for Finnair.

Wideroe, Aer Arann and Eurolot also increased their intra-European turboprop capacity in 2004-2013.

These three airlines operate all-turboprop fleets and have acquired either ATR72s or Q400s since 2004. This highlights the shift to larger turboprops.

Wideroe expanded its all-Dash-8 fleet, increasing the number of larger Q400s.

Aer Arann increased its fleet by three aircraft, adding more ATR72s while Eurolot transitioned to a fleet of Q400s.

Average seat capacity on intra-European turboprop services has increased since 2004 from 48 to 57 seats. Airlines have moved to larger types, such as the Q400 and ATR72.

RJ growth

Lufthansa CityLine had the largest intra-European RJ capacity in 2013. Although it reduced its overall fleet size by 19 aircraft from 2004 to 2014, it added capacity by replacing older and smaller RJs, such as CRJ-100s/-200s and Avro RJ85s, with E-190s, E-195s and CRJ-900s.

The next largest providers of intra-European RJ capacity in 2013 were HOP, KLM Cityhopper and FlyBe. These airlines also replaced older RJs with new generation 70- to 130-seat RJs.

HOP is the result of a merger between three French regional airlines: Brit Air, Airlinair and Regional. The Brit Air and Regional fleets comprised small RJs, such as the CRJ-100 and ERJ-135 and ERJ-145. These are now being phased out in favour of CRJ-1000s, E-170s and E-190s.

KLM Cityhopper increased its RJ capacity from 2004 to 2013. It added E-190s and phased out Fokker 100s. Flybe also increased its RJ capacity, removing ageing 146-200s and -300s in favour of E-195s and E-175s. The Flybe Finland fleet includes E-170s and E-190s.

There is evidence of turboprops being replaced by new generation RJs on some intra-European services.

From 2004 to 2014 Air Nostrum phased-out Dash 8-300s, reduced the number of ATR72s in its fleet and added CRJ-900s and CRJ-1000s. In 2004 one of the routes operated with a high number of turboprop frequencies was Madrid-Valencia. In 2013 most of the flights on this city-pair were being operated by CRJ-900s and CRJ-1000s.

Air Dolomiti and Eurowings completely removed turboprops from their fleets as the two Lufthansa Regional carriers introduced CRJ-900s and E-195s.

KLM Cityhopper has removed Fokker 50s from its fleet. Alitalia regional services, previously provided by Alitalia Express, featured routes operated by ATR72s in 2004. By 2013 these services were flown by Alitalia CityLiner using E-175s and E-190s.

There is evidence that from 2004 to 2013, some European full-service carriers replaced mainline narrowbody capacity on intra-European routes with RJs operated by their regional subsidiaries.

KLM reduced narrowbody capacity and increased flights using KLM



Cityhopper Fokker 70s and E-190s on routes from AMS and Aberdeen (ABZ), Goteborg (GOT), Nice (NCE), Prague (PRG), Stuttgart (STR) and Zurich (ZRH).

Lufthansa reduced narrowbody capacity on routes between its MUC hub and Belgrade (BEG), BHX, NCE, Vienna (VIE) and ZRH. Lufthansa Cityline offered increased RJ capacity on these sectors using CRJ-900s and E-195s in 2013.

Air France has also reduced narrowbody capacity from its hub at CDG to Bologna (BLQ), Oslo (OSL), Pau (PUF), Strasbourg (SXB) and Turin (TRN) since 2004. By 2013 these seats appear to have been replaced with services operated by HOP using E-170s and E-190s.

There is also evidence that the growth in European RJ capacity is partly due to airlines using them to open new routes.

Lufthansa CityLine operated RJ services from FRA to seven destinations in 2013 that were not served by the Lufthansa Group in 2004. These were mainly to Polish cities using CRJ-700s.

KLM Cityhopper flew to eight destinations from AMS in 2013 that were not served by KLM in 2004. Cityhopper opened new routes to regional airports using its Fokker 70s and E-190s. There were new destinations in Scandinavia, along with Basel (BSL), Bordeaux (BOD), Florence (FLR) and Manston (MSE).

Other carriers have used 70- to 130-seat RJs to establish new routes from airports with shorter, more restricted runways, for example, BA CityFlyer from LCY.

The runway at LCY is 4,947 ft long. This had previously restricted the type of aircraft that could operate economically, and subsequently the range of potential destinations.

The operating performance and lower costs associated with new 70- to 130-seat RJs may explain why additional longer-range destinations have been added from LCY since 2004.

BA CityFlyer's E-170s and E-190s have allowed it to open routes from LCY to Faro (FAO), Granada (GRX), Ibiza (IBZ), Malaga (AGP), Menorca (MAH) and Palma de Mallorca (PMI) since 2004. This has transformed LCY's route network to include leisure destinations alongside its traditional business routes.

There are indications that the growth of intra-European RJ capacity is a result of airlines using larger 70- to 130-seat RJs to replace turboprops, open new routes in lower-demand markets, and optimise capacity on existing routes that might not always support demand for narrowbody operations.

At the same time, many full-service carriers increased their intra-European narrowbody and RJ capacity from 2004 to 2013. This suggests that, rather than displacing narrowbodies in airlines' fleets, RJs are being used to optimise capacity on lower-density markets or on high-density routes during off-peak periods.

Charter

Charter or holiday airlines fly point-to-point scheduled services to mainly leisure-based destinations using narrowbodies or widebodies. Many

New 70- to 130-seat RJs have been used to replace turboprops and older RJs on intra-European services. They have also been used to open new routes.

charter airlines began operating scheduled flights to counter the growing threat of the LCCs.

The largest charter airlines in terms of intra-European capacity in 2013 were Thomson Airways, Monarch, Thomas Cook Airlines UK, Condor and TUIfly.

The general fleet trend among these carriers since 2004 has been the greater use of larger narrowbodies, such as the 737-800 and A321 on intra-European routes, sometimes at the expense of older narrowbodies or widebodies.

Thomson Airways has built up a fleet of 737-800s, while reducing its use of 757s and 767s on intra-European services.

Monarch has increased the number of A320s and A321s in its fleet and reduced the number of intra-European flights operated by A300s and 757s.

Thomas Cook Airlines UK and Condor, both part of the Thomas Cook group, have each added A321s to their fleets.

TUIfly no longer operates 737-500s, now it has a fleet of 737-700s and -800s.

Summary

As described, seat capacity on intra-European routes increased by 33.5% from 2004 to 2013. The largest growth in capacity came in the narrowbody segment. The development of LCCs contributed to this. No major European LCCs are using RJs.

Regional capacity remained fairly static. The number of seats provided by turboprops declined, but these were replaced by operations with 70- to 130-seat RJs.

Widebody capacity was reduced in favour of large narrowbodies.

The average size of turboprop, RJ, narrowbody and widebody aircraft used on intra-European services all increased from 2004 to 2013 (*see table, page xx*).

Overall, there is evidence that new-generation 70- to 130-seat RJs have replaced turboprops and older RJs. There were also indications that new generation RJs have been used to optimise capacity by operating on lower demand routes, or at off-peak times on higher demand sectors.

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