Air & Sea Access

Planned Capacity for Winter 2024/25 (November 2024 – March 2025)

Fáilte Ireland

Overview of Ireland's Air Capacity

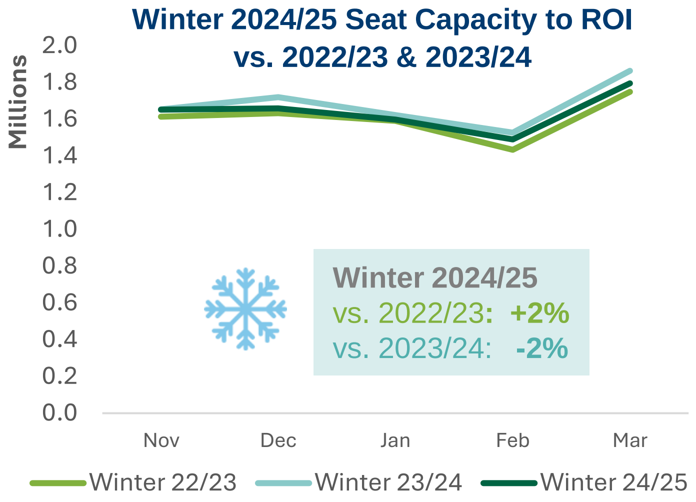
2024 Air Access: Full Year Schedule

Air seat capacity to ROI in 2024 stands at +3% above 2023 levels (as of Dec 2nd 2024).

Lookback on Summer 2024 (Apr-Oct)

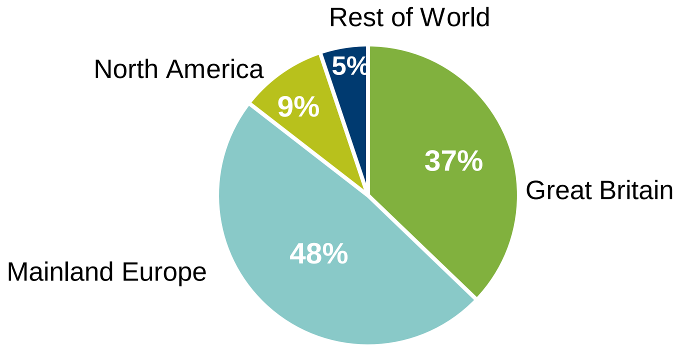
- Summer seat capacity to ROI was 3.5% above its 2023 levels.
- France, Italy & the US grew year-on-year, while GB & Germany saw a reduction in the number of seats to ROI.
- Most Irish airports experienced an increase in scheduled seats for the summer (except for Kerry & Knock). Cork was the fastest growing airport in terms of seat capacity (+5%).
- Most of the key airlines servicing Ireland grew their capacity over the summer months.
- Ryanair accounted for 48% of all seats while Aer Lingus had a share of 31%. Both airlines reduced the number of seats from the GB market but increased capacity in other markets.

Winter Air Access to Republic of Ireland (ROI)



- Following a record high of seat capacity in Winter 2023/24, the number of seats for Winter 2024/25 is set to decrease by -2% for ROI, with reductions across all of Ireland's key source markets.
- Dublin's capacity is down -4% vs. Winter 2023/24.
- As Dublin accounts for 84% of all seats to ROI, the Dublin Airport passenger cap has impacted the overall seat capacity to ROI.

Share of Seats by Main Market



Change in Capacity by Main Market vs. last Winter

Main Market	Change vs. Winter 23/24
Great Britain	-5%
Mainland Europe	-2%
North America	-4 %
Rest of World	+16%
All Markets	-2%

Source: OAG

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Winter Access to Ireland (ROI): Air & Sea Capacity

Winter Air Access from ROI's Key Markets

The -5% drop in capacity from **GB** is mostly attributable to Aer Lingus which has scheduled 115,000 fewer seats this winter.

Capacity from the **US** market is expected to be -4% on last winter. The reduction in scheduled seats from the US this winter has occurred across three of the four American airlines operating to Ireland. American carriers accounted for 28% of capacity from the US last winter, down to 22% this coming winter season.

JetBlue had two routes (Boston-Dublin and New York-Dublin) from the end of the last winter season in March 2024 and into the summer but is no longer on the Winter schedule.

Capacity from **France** this winter is expected to be -11% compared to last winter. This is mainly due to 49,000 fewer seats on Ryanair flights, which last winter accounted for 38% share of all seats from France to ROI, now down to 30%.

Capacity from **Germany** is due to be -2% down on last winter. While Ryanair has reduced the number of scheduled seats from Germany, the decrease is less (11,000 seats) and its share smaller than in other key markets.

Source: OAG

Lookback: Summer Sea Access 2024

Summer sea access grew by 7% in 2024 as a result of additional capacity on both Cross Channel and Continental routes.

Winter Sea Access to ROI

Weekly Summer Passenger Capacity to ROI by Sailing Corridor

- Inbound passenger capacity on ferries for Winter 2024/25 is due to grow by 4% compared to last winter.
- This is mainly driven by an increase in capacity from Great Britain.
- Capacity from continental Europe is down 2,500 passenger seats (-22%) per week this winter.

Corridor	One-way Weekly Passenger Capacity	Change vs. Winter 2023/24
Cross Channel	90,300	+7%
Continental	9,300	-22%
All	**99,600**	**+4%**

Source: Ferry operators

For more detail on the Inbound Air & Sea Access dashboard: click here

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Winter Capacity to ROI by Key Source Markets 2024/25 vs. 2023/24 – Excluding Scheduled Seats on Sun Routes

Winter Access to ROI

80% of scheduled access to Ireland comes from **air capacity**.

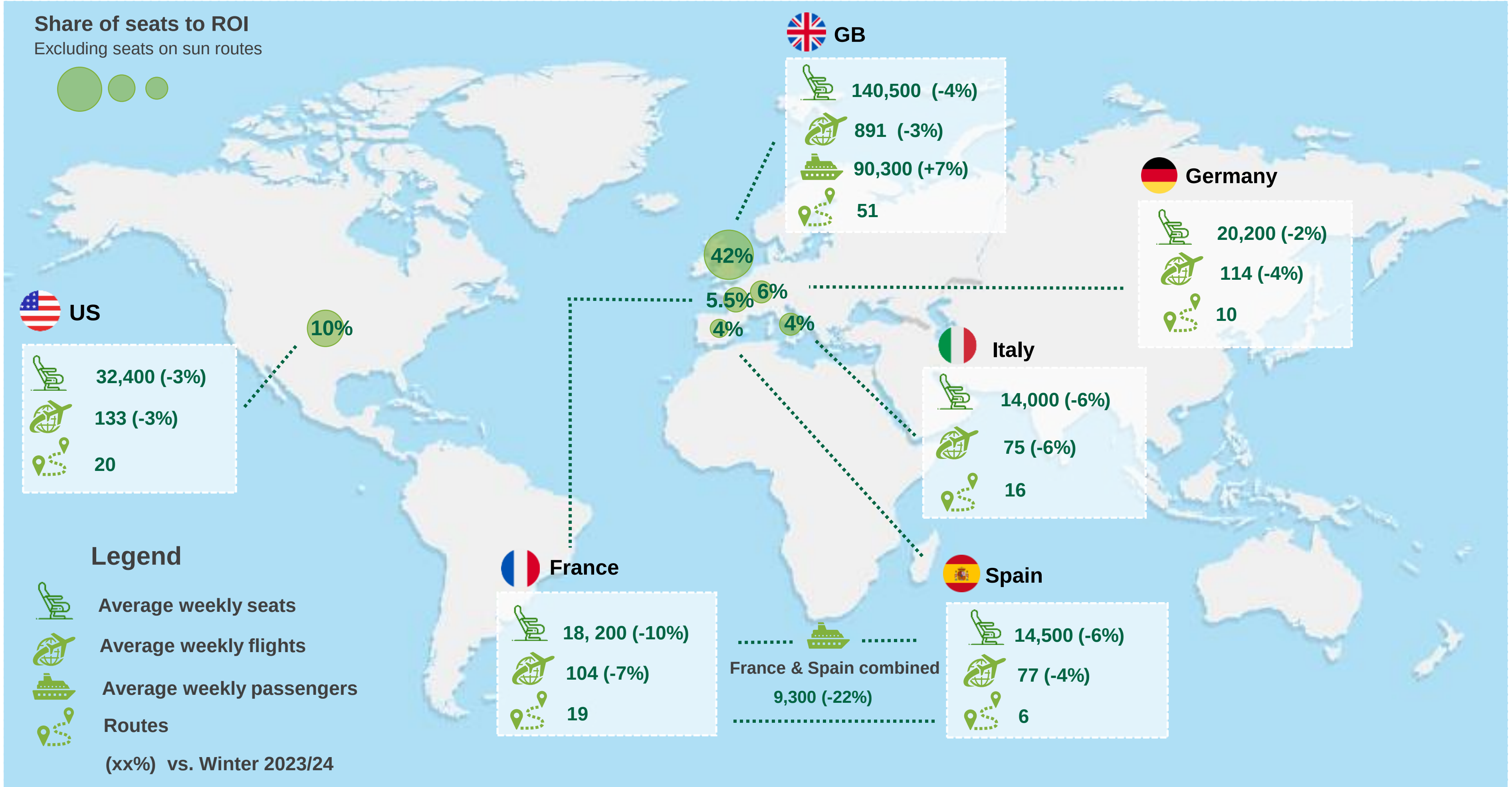
12% of air capacity is scheduled on **sun routes** and is therefore more directed towards domestic outbound travel (this is excluded from the map).

332,600
Average weekly seats

1,889
Average weekly flights

99,600
Average weekly passengers

185
Routes



Source: OAG