TOO MANY PLANES, NOT ENOUGH RUNWAYS

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Too Many Planes, Not Enough Runways

Supply constraints are a persistent challenge in aviation. Airlines continue to face headwinds with aircraft delivery delays, labor shortages, MRO (maintenance, repair, and overhaul) backlogs, and infrastructure congestion. During United Airlines' earnings call last week, CEO Scott Kirby specifically pointed to airport capacity constraints in international markets as a long-term concern.

Airports where demand consistently exceeds available capacity are classified as Level 3 by the International Air Transport Association (IATA). These airports require slot coordination for takeoffs and landings. As of the Summer 2025 season, 215 airports worldwide fall into this Level 3 category. Airports with periodic congestion—during certain hours, days, or seasons—are classified as Level 2, with 171 airports currently holding that designation.

In 2025, it is estimated that:

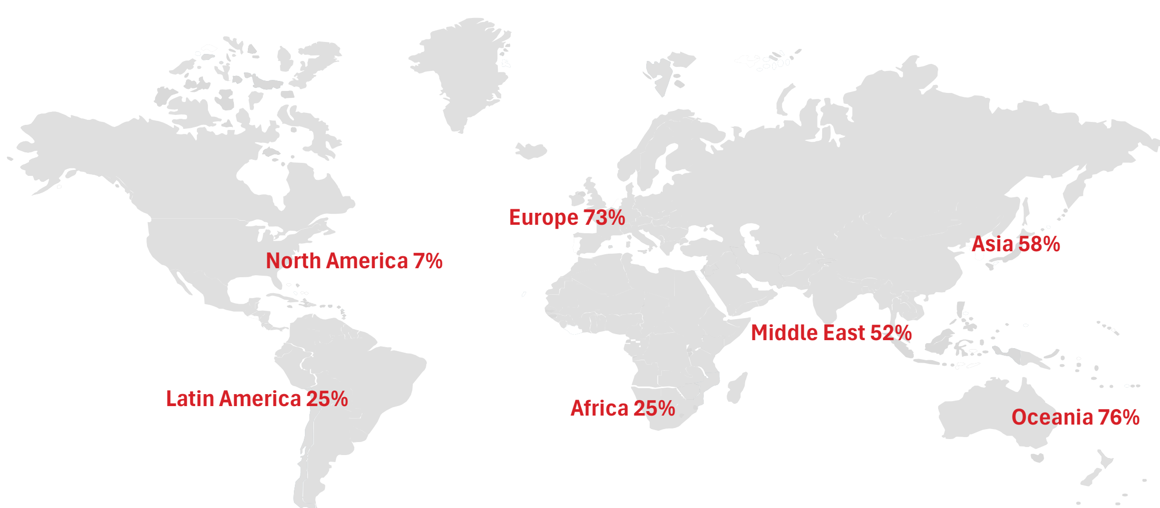
- 46% of global airline seats are operated through Level 3 airports, and
- An additional 15% are through Level 2 airports.

Regions like Europe and parts of Asia face particularly tight constraints due to dense urban environments, land limitations, and regulatory hurdles that inhibit airport expansion. In contrast, while congestion exists in Latin America, Africa, and Southeast Asia, many airports lack the formal coordination frameworks to be designated Level 3. In North America, high demand exists as well, but U.S. airports generally benefit from greater physical space and runway capacity, reducing the need for full slot coordination.

Importantly, slot scarcity is only one aspect of the broader infrastructure challenge. Airlines must also contend with runway and terminal limitations, airspace congestion, and the long lead times associated with building or expanding airports.

In this context, United and other carriers are right to be concerned about long-term airport supply constraints. Strategic network planning must continue to account for these limitations as airlines seek to grow and preserve access to high-value markets.

% Seats Operated Through Level 3 Airports by Region



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Slot Restriction Level at Top 10 Airports in each Region by Seat Count

AFRICA		
CAI	Egypt	2
ADD	Ethiopia	-
JNB	South Africa	3
CMN	Morocco	3
CPT	South Africa	3
NBO	Kenya	-
ALG	Algeria	-
RAK	Morocco	3
TUN	Tunisia	3
HRG	Egypt	-

ASIA		
HND	Japan	3
PVG	China	3
CAN	China	3
DEL	India	3
PEK	China	3
SIN	Singapore	3
ICN	Korea	3
KUL	Malaysia	3
BKK	Thailand	3
HKG	Hong Kong	3

SOUTHWEST PACIFIC		
SYD	Australia	3
MEL	Australia	3
BNE	Australia	3
AKL	New Zealand	3
PER	Australia	3
ADL	Australia	3
CHC	New Zealand	3
OOL	Australia	3
WLG	New Zealand	3
CNS	Australia	3

LATIN AMERICA		
BOG	Colombia	3
GRU	Brazil	3
MEX	Mexico	3
CUN	Mexico	-
LIM	Peru	3
SCL	Chile	-
CGH	Brazil	3
PTY	Panama	-
GDL	Mexico	-
AEP	Argentina	-

MIDDLE EAST		
DXB	UAE	3
DOH	Qatar	2
JED	Saudi Arabia	3
RUH	Saudi Arabia	3
AUH	UAE	2
TLV	Israel	3
KWI	Kuwait	2
SHJ	UAE	-
DMM	Saudi Arabia	3
MCT	Oman	2

EUROPE		
LHR	U.K.	3
IST	Turkiye	3
CDG	France	3
FRA	Germany	3
AMS	Netherlands	3
MAD	Spain	3
BCN	Spain	3
FCO	Italy	3
MUC	Germany	3
SAW	Turkiye	3

NORTH AMERICA		
ATL	USA	-
DFW	USA	-
ORD	USA	2
DEN	USA	-
LAX	USA	2
JFK	USA	3
CLT	USA	-
LAS	USA	-
MCO	USA	2
MIA	USA	-

Sources: *OAG Schedules, Full Year 2025, IATA Worldwide Airport Slot Guidelines Northern Summer 2025, mba Aviation analysis.*

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mba Aviation HQ - Washington D.C.
2101 Wilson Boulevard, Suite 1001
Arlington, Virginia 22201
+1 703-276-3200
www.mba.aero
mba@mba.aero

mba Aviation Europe - London
Salisbury House
Unit 815-817
29 Finsbury Circus
London EC2M 5SQ
United Kingdom
+44 207 887 6010
www.mba.aero
mbaeurope@mba.aero