



WORKING PAPER

TENTH SESSION OF THE STATISTICS DIVISION

Montréal, 23 to 27 November 2009

Agenda Item 2: Air carrier traffic data and traffic flow statistics

DEFINITION AND IDENTIFICATION OF LOW-COST CARRIERS

(Presented by the Secretariat)

SUMMARY

The need for identification of Low-Cost Carriers (LCCs) in ICAO's statistics programme is gaining importance as a result of their increasing international presence. ICAO has already developed a definition of LCCs in the context of economic regulation of international air transport and there are other definitions and/or identification methods of LCCs adopted by States and international organizations. This paper reviews various methods of identifying LCCs, as well as the issues associated with them, such as a trade-off between the limitation of data on this category of carriers and the application of an element of subjective judgement to determine the categorisation. In order to integrate this new market segment in ICAO's statistics programme, the paper recommends that ICAO should send a list of carriers identified as being LCCs, as appearing in the Appendix to this working paper, to Contracting States and the aim is to seek their feedback on the appropriateness of the categorization for those carriers on the list, and others not listed, in order to update this list on a regular basis..

Action by the division is in paragraph 5.

1. INTRODUCTION

1.1 The growth of Low-Cost Carriers (LCCs) has had a significant impact on airline competition, airline business models and air travel in general. The emergence of LCCs was originally seen in the United States' domestic air travel market, associated with the Airline Deregulation Act of 1978, before spreading to other domestic and international markets. In the early 1990s, LCCs began to develop in Europe where air transport markets had then been deregulated with the implementation of the third package of the liberalization of the European Air Transport Market, and subsequently spread to much of the rest of the world.

1.2 This paper provides background information regarding the need to identify LCCs in ICAO's statistics, and discusses the definition and identification methods of LCCs, as well as the issues associated with such identification methods. The Appendix to the paper provides a preliminary list of LCCs compiled as identified by the Secretariat.

2. NEED TO IDENTIFY LOW-COST CARRIERS

2.1 At present, ICAO's statistics distinguish airlines based on the type of operations they offer, i.e. international or domestic, scheduled or non-scheduled, as well as their type of traffic, i.e. passenger or all-cargo. Due to the recent structural changes undergone by the airline industry, however, there has been a growing interest in (and thus the need for) another level of classification based on the characteristics of airline business models, namely LCCs.

2.2 The identification of LCCs in ICAO's statistics is gaining importance as LCCs have grown rapidly not only at the domestic level but, increasingly, internationally. The international expansion of LCCs has been spurred by the progress of liberalization of international air transport. According to ICAO's latest traffic figures, passengers carried on scheduled air services (international plus domestic) increased by around 4.4 percent per year between 1998 and 2008. This passenger traffic growth was shared unequally between member airlines of the International Air Transport Association (IATA) and LCCs. The LCCs market share increased significantly, reaching 30 per cent of domestic scheduled traffic and around 20 per cent of total world scheduled traffic.

3. DEFINITION AND IDENTIFICATION

3.1 ICAO has developed a definition of LCCs in the context of its Strategic Objective D.4 (liberalization of air transport regulation and efficiency of infrastructure management). Chapter 5.1 of the *Manual on the Regulation of International Air Transport* (Doc 9626) defines an LCC as "an air carrier that has a relatively low-cost structure in comparison with other comparable carriers and offers low fares and rates. Such an airline may be independent, the division or subsidiary of a major network airline or, in some instances, the ex-charter arm of an airline group." LCCs are also called low-cost airlines, or nofrills, discount, low-fares, budget or value-based airlines or carriers.

3.2 The ICAO definition of LCCs focuses on the aspects of costs and fares, and its criteria are similar to those adopted by the U.S. Department of Transportation (DOT). In its 1996 report entitled *Low Cost Airline Service Revolution*¹, DOT selected LCCs based on the following elements:

- a) unit operating costs: Operating costs per available seat-mile for passenger service were estimated by using total operating expenses, less transport related expenses, and by using a revenue offset approach to estimate non-passenger expenses (with the assumption that the non-passenger expenses equal non-passenger revenues, and reduced total operating expenses accordingly); and
- b) pricing practices: Each new entrant airline's average prices on a market-by-market basis were examined to determine whether or not the airline consistently maintained low fares relative to prices charged by other airlines before it entered a city-pair market.

¹ <http://ostpxweb.dot.gov/aviation/Data/lowcostrevo.pdf>

3.3 In contrast, the U.K. Civil Aviation Authority (CAA) qualitatively identified LCCs, in its report entitled *No-frills Carriers: Revolution or Evolution? A Study by the Civil Aviation Authority (CAP 770, 2006)*², based primarily on whether they have a single class of travel, offer no-frills on board and are not connected to the international reservations systems. CAA noted that “the comparative lack of frills on board compared to traditional airlines has been seen, at least in the past, as one of the defining characteristics of this airline type, along with the low fares they offer. Judging whether an airline has high or low costs is both more complicated than assessing its on board services, and also potentially less relevant (if, say, an airline is pursuing a high fare market).”

3.4 Another way to distinguish LCCs is to qualitatively examine airline business models as a whole. There is a general understanding in the industry, regulatory bodies and the media, and among the travelling public, of what a low-cost business model is and what services LCCs are supposed to offer. That is, with some variations, point-to-point services focussing mainly on short-haul routes, high frequencies, simple fare structures, high-density single class with few or no-frills, staffing flexibility with minimal overheads, and intensive use of e-commerce for marketing and distribution. To sustain low-cost structures, these airlines usually operate a single aircraft type with higher aircraft utilization. They often use less-congested secondary airports to ensure short turn-around and high punctuality and to save airport-related costs. It is the low operating costs that enable LCCs to allocate a large portion of their seats to low fares.

3.5 The identification of LCCs based on business models was adopted, *inter alia*, by the report on the *Analyses of the European Air Transport Market: Airline Business Models*³ (prepared for the European Commission), EUROCONTROL’s twice-yearly *Low-Cost Carrier Market Update*⁴, as well as the Australian Competition and Consumer Commission (ACCC) and the New Zealand Commerce Commission when they reviewed the application of Qantas and Air New Zealand for their proposed alliance⁵. For example, the European Commission’s report divided airlines into four categories: full service network carriers, LCCs, regional carriers and holiday/charter carriers. The LCCs category comprises “those airlines that offer low prices for the majority of flights and which mainly operate on short and medium-distance routes with low overheads and a relatively high load factor”.

4. ISSUES

4.1 In choosing the appropriate selection method amongst the ones described above, a trade-off between the limitation of data on this category of carriers and the application of an element of subjective judgement to categorise them should be taken into consideration.

4.2 On the one hand, the quantitative assessment of both costs and fares could produce the most accurate list of LCCs with minimum room for subjective judgement. It is, however, very hard to monitor air fare movements on a market-by-market basis and also to know how many seats are allocated to low fares, due to the lack of readily available data. On the other hand, the qualitative assessment of either on board services or business models could be more practical given readily available information, although a high degree of subjective judgement might be involved. As the number of LCCs is growing,

² <http://www.caa.co.uk/application.aspx?catid=33&pagetype=65&appid=11&mode=detail&id=2528>

CAA used the term “no-frills carrier” instead of LCCs not least to avoid the confusion with charter carriers which have always considered themselves to be low cost operations.

³ http://ec.europa.eu/transport/air/doc/abm_report_2008.pdf

⁴ http://www.eurocontrol.int/statfor/public/subsite_homepage/homepage.html

⁵ <http://www.accc.gov.au/content/index.phtml/itemId/744584/fromItemId/729983>

<http://www.comcom.govt.nz/BusinessCompetition/Anti-competitivePractices/Applications/airnewzealandqantas.aspx>

more variants will emerge among LCCs that differentiate their quantity and quality of services, thereby increasing the impact of subjective judgement on the selection process.

4.3 It should also be borne in mind that, in the long-term, it would become more difficult to make a sharp distinction between LCCs and other airlines based on the services they offer and/or business models. This is because major network airlines (legacy airlines) have been shifting their focus towards achieving cost reductions and changing the way they operate in response to growing cost and competitive pressures from LCCs. Increasing convergence of services and business models might not make the LCC tag relevant at some point in the future.

4.4 Regardless of the methods chosen, a limited route analysis would be required because some airlines' low-cost flights are operated only on specific routes. Since LCCs could put away or modify their business models and/or network airlines could transform themselves into LCCs, it would also be necessary to conduct periodic assessments to update the list of LCCs.

4.5 One technical issue that should be addressed in this context is the manner in which the flight schedule, traffic and financial data for an LCC could be segregated when such an LCC is established as an "airline within an airline", i.e. a subsidiary or division of a major network airline or a non-scheduled airline, performing scheduled operations on short-haul routes so as to compete with LCCs and to avoid the potential threat of new entrants. An "airline within an airline" often uses the same carrier code as its parent company (thus the difficulty in differentiating the LCCs' from the parent company's flights).

4.6 Taking into account these difficulties, the practical way to identify LCCs in ICAO's statistics could be to send a list of LCCs compiled by the Secretariat to Contracting States and seek their feedback on the appropriateness of the categorisation for those carriers on the list, and others not listed, for updating the list on a regular basis.

4.7 *The Fourteenth Meeting of the Statistics Panel (STAP/14-1)* recommended that the definition of LCCs developed by ICAO in the *Manual on the Regulation of International Air Transport* (Doc 9626) be accepted and that the list of LCCs attached in Appendix of the STAP/14 WP 11, be updated by ICAO on a regular basis based on the feedback from States, and that this list should be amended by including the ICAO codes instead of the IATA ones. However, it is suggested to keep both codes in order to be able to make necessary crosschecks with external databases, such as the OAG one.

5. ACTION BY THE DIVISION

5.1 The division is invited to:

- a) agree to the definition of LCCs developed by ICAO in the *Manual on the Regulation of International Air Transport* (Doc 9626) be accepted;
- b) agree that ICAO should annually update the list of LCCs, as appearing in the Appendix to this working paper, based on the feedback from Contracting States; and
- c) agree that the codes associated with each LCC should preferably show both the IATA and the ICAO codes.

APPENDIX A

LIST OF POSSIBLE LCCs (PRELIMINARY COMPILATION)

Area	Country	Airline	ICAO Code	Code	Formed	Ceased	Ownership relations with other airlines	Former names	Notes
AF	Morocco	Atlas Blue	BMM	8A	2004		100% Royal Air Maroc (2004-)		
AF	Morocco	Jet4You	JFU	8J	2006		100% TUI AG (min 40%, 2006-)		
AF	South Africa	1Time	RNX	1T	2003				
AF	South Africa	Kulula.com		MN	2001		100% Comair (2001-)		
AF	South Africa	Mango		JE	2006		100% South African Airways (2006-)		
AP	Australia	Compass Airlines		YM	1990	1993			Ceased operations in 1991; Resumed services under SCA in 1992
AP	Australia	Impulse Airlines		VQ	1992	2004	100% Qantas (2001-2003)		Integrated into the QantasLink group of subsidiary airlines in 2001; Impulse brand was replaced by Jetstar in 2004
AP	Australia	Jetstar	JST	JQ	2003		100% Qantas (2003-)		Replaced Impulse Airlines brand in 2004
AP	Australia	Tiger Airways Australia		TT	2007		100% Tiger Aviation (parent company of Tiger Airways)		
AP	Australia	V Australia	VAU	VA	2008		100% Virgin Blue Holdings (parent company of Virgin Blue Airlines)		
AP	Australia	Virgin Blue Airlines	VBH	DJ	1999		25% Virgin Group (max 100%, 1999-)		
AP	China	Spring Airlines	CQH	9S	2004				
AP	China [Hong Kong SAR]	Oasis Hong Kong Airlines		O8	2006	2008			
AP	China [Macao SAR]	Viva Macau	VVM	ZG	2004				
AP	India	Air India Express	AXB	IX	2004		100% Air India (2004-)		
AP	India	GoAir	GOW	G8	2004				
AP	India	IndiGo		6E	2005				
AP	India	Kingfisher Red		IT	1995		100% Kingfisher Airlines (min 26%, 2007-)	Deccan Aviation (1995-2002), Air Deccan (2002-2008)	
AP	India	Spicejet	SEJ	SG	2000			Royal Airways (2000-2005)	
AP	Indonesia	Adam Skyconnection	DHI	KI	2003				

Area	Country	Airline	ICAO Code	Code	Formed	Ceased	Ownership relations with other airlines	Former names	Notes
		Airlines							
AP	Indonesia	Citilink		GA	2001		100% Garuda Indonesia (2001-)		
AP	Indonesia	Indonesia AirAsia		QZ	1999		49% AirAsia (2004-)	Awair International (1999-2004)	Ceased operations in 2002; Resumed operations in 2004
AP	Indonesia	Lion Airlines	LNI	JT	2000				
AP	Japan	Air Do	ADO	HD	1996		14% All Nippon Airways (2002-)		Bankruptcy protection from 2002 to 2005
AP	Japan	Skymark Airlines	SKY	BC	1996				
AP	Japan	Skynet Asia Airways	SNJ	6J	1997		14.99% All Nippon Airways (2005-)	Pan Asia Airlines (1997-1999)	Operated under Industrial Revitalization Corporation of Japan (IRCJ) from 2004 to 2007
AP	Japan	Star Flyer	SFJ	7G	2002			Kobe Airlines (2002-2003)	
AP	Malaysia	AirAsia	AXM	AK	1993				Tune Air Sdn Bhd's control since 2001
AP	Malaysia	AirAsia X	XAX	D7	2006		16% AirAsia (over majority together with AirAsia related investors, 2007-), 16% Virgin Group (2007-)	FAX Fly Asian Express (2006-2007)	
AP	New Zealand	Freedom Air		SJ	1995	2008	100% Air New Zealand (previously through its subsidiary Mount Cook Airlines, 1995-2008)		
AP	New Zealand	Kiwi Travel International Airlines			1994	1996		Kiwi Travel Air Charters (1994-1995)	
AP	New Zealand	Pacific Blue Airlines	PBN	DJ	2003		100% Virgin Blue (2003-)		
AP	New Zealand	Tasman Express		NZ	2003		a division of Air New Zealand (2003-)		
AP	Pakistan	Aero Asia International	RSO	E4	1993				
AP	Pakistan	Air Blue	ABQ	ED	2003				
AP	Philippines	Air Philippines	GAP	2P	1995		70% Lucio Tan (majority owner of Philippine Airlines, 1999-)		
AP	Philippines	Cebu Pacific Air	CEB	5J	1988				
AP	Philippines	PAL Express		PR	2008		100% Philippine Airlines		
AP	Republic of Korea	Hansung Air	HAN	HS	2005	2008			
AP	Republic of Korea	Jeju Air	JJA	7C	2006				
AP	Republic of Korea	Jin Air	JNA	LJ	2008		100% Korean Air		Planned initial name was Air Korea
AP	Samoa	Polynesian Blue	PBL	DJ	2005		49% Virgin Blue (2005-)		Took over the jet operations of Polynesian Airlines

Area	Country	Airline	ICAO Code	Code	Formed	Ceased	Ownership relations with other airlines	Former names	Notes
AP	Singapore	Jetstar Asia	JSA	3K	2004		44.5% Qantas (in Orangestar, 2004-), 30.9% Temasek Holdings (Singapore Airlines' majority owner, ditto, 2004-)		Formed in 2004 (49% Qantas, 19% Temasek Holdings); Jetstar Asia and ValuAir was integrated under a holding company Orangestar in 2005
AP	Singapore	Tiger Airways	TGW	TR	2003		49% Singapore Airlines (2003-), 30.9% Temasek Holdings (Singapore Airlines' majority owner, 2003-), 16% family of Ryanair founder (2003-)		
AP	Singapore	ValuAir	VLU	VF	2003		44.5% Qantas (in Orangestar, 2004-), 30.9% Temasek Holdings (Singapore Airlines' majority owner, ditto, 2004-)		Jetstar Asia and ValuAir was integrated under a holding company Orangestar in 2005
AP	Thailand	Nok Air	NOK	DD	2004		39% Thai Airways International (2004-)		
AP	Thailand	One-Two-Go	OTG	OX	2003		100% Orient Thai Airlines (2003-)		
AP	Thailand	Thai AirAsia	AIQ	FD	2003		49% AirAsia (2003-)		
AP	Viet Nam	Jetstar Pacific		BL	1991		86.49% Vietnam Airlines (min 56.49%, 1991-2005), 30% U-Land Airlines (1998-2000), 18% Qantas (with option to increase to 30%, 2007-)	Pacific Airlines (1991-2008)	
EU	Albania	Belle Air	LBY	LZ	2005				
EU	Austria	InterSky	ISK	3L	2001				
EU	Austria	Niki	NLY	HG	2003		24% Air Berlin (2004-)		Formed from former Aero Lloyd Austria operation
EU	Belgium	Virgin Express	VEX	TV	1991	2007	51% Virgin Group (max 100%, min 51%, 1996-2007)	EuroBelgian (1990-1996)	Merged with SN Brussels Airlines under a holding company SN Airholding in 2005; Brussels Airlines was formed in 2006 and took over both SN Brussels Airlines and Virgin Express in 2007
EU	Bulgaria	Wizz Air Bulgaria	WVL	8Z	2005		100% Wizz Air (2005-)		
EU	Czech Republic	Smart Wings	TVS	QS	2004		100% Travel Service Airlines (2004-, Travel Service has been majority owned by Icelandair Group since 2007)		
EU	Denmark	Sterling	SNB	NB	1994	2008	100% Fons Eignarhaldsfelag hf (majority owner company of Iceland Express, 2005), FL Group (parent company of Icelandair, 2005-2008), 100% Cimber (2008-)	Sterling European Airways (1994-2005)	Bankrupted and Cimber acquired 100% in 2008
EU	Finland	Blue 1	BLF	KF	1987		SAS (1998-)	Air Botnia (1987-2004)	
EU	Finland	Flying Finn			2002	2004			
EU	France	Aeris		SH	1990	2003		Air Toulouse (1990-1999)	

Area	Country	Airline	ICAO Code	Code	Formed	Ceased	Ownership relations with other airlines	Former names	Notes
EU	France	Flywest			2004	2005			
EU	France	Virgin Express France			1995	1999	100% Virgin Express Holdings (1997-1998)	Air Provence Charter (1995-1997)	
EU	Germany	Air Berlin	BER	AB	1978				Merged with dba in 2007
EU	Germany	Condor Flugdienst	CFG	DE	1955		24.9% Lufthansa (max 100%, min 10%, 1959-), 75.1% Thomas Cook Group (max 90%, 2001-)	Deutsche Flugdienst (1955-1961)	All the flights started to fly under Thomas Cook Banner in 2003
EU	Germany	Dauair	DAU	D5	2005	2006			
EU	Germany	dba		DI	1978	2007	40% Crossair (1978-1992), 100% British Airways (min 49%, 1992-2003), 64% owner of Germania (2005), 100% Air Berlin (2006-2007)	Delta Air Regionalflugverkehr (1978-1992), Deutsche BA (1992-2003)	Merged with Germania Express in 2005; Merged into Air Berlin in 2007
EU	Germany	Germania Express (gexx)		ST	2003	2005	100% Germania (2003-2005), 100% dba (2005)		Merged into dba in 2005
EU	Germany	Germanwings	GWI	4U	2002		100% Eurowings (2002-2008), 100% Lufthansa (2009-)		
EU	Germany	TUIFly		X3	2002		100% TUI AG (2002-)	Hapag-Lloyd Express (HLX, 2002-2007)	Integrated with Hapagfly to become TUIFly in 2007 (Hapag-Lloyd Express became a marketing brand)
EU	Hungary	SkyEurope Hungary	TVL	5P	2003		100% SkyEurope Airlines (2003-)		
EU	Hungary	Wizz Air	WZZ	W6	2003				
EU	Iceland	Iceland Express		HW	2002				
EU	Ireland	Aer Arann	REA	RE	1970				
EU	Ireland	Eujet		VE	2003	2005			
EU	Ireland	JetMagic		GX	2002	2004			
EU	Ireland	Ryanair	RZR	FR	1985				Merged with Buzz in 2003
EU	Ireland	Virgin Express (Ireland)		TV	1998	2001	100% Virgin Express Holdings (1998-2001)		
EU	Italy	Air Europe		PE	1988	2008	27.5% Eurofly (1991-1998), 49.9% SAir Group (1998-2002), 100% Alitalia (2006-)		Merged with Volare Airlines in 2000 (became one brand of Volare)
EU	Italy	Air Service Plus			2003				Currently operated by Axis Airlines
EU	Italy	Blu-Express	BPA	BV	2005		100% Blue Panorama Airlines (2005-)		
EU	Italy	Ciao Fly			2002	2002			
EU	Italy	ItAli Airlines	ACL	9X	2003				
EU	Italy	Meridiana	ISS	IG	1963			Alisarda (1963-1991)	
EU	Italy	Myair (My Way Airlines)	MYW	8I	2004				
EU	Italy	Volare Airlines (volareweb.com)	PVL	VA	1997		49.9% SAir Group (min 34%, 1998-2002), 100% Alitalia (2006-)		Merged with Air Europe in 2000; Ceased operations in 2004; Resumed operations in 2005

Area	Country	Airline	ICAO Code	Code	Formed	Ceased	Ownership relations with other airlines	Former names	Notes
EU	Italy	Wind Jet	JET	IV	2003				
EU	Malta	Britishjet			2004	2008			Licensed by UK CAA
EU	Malta	Fare4U			2004	2006	a division of Air Malta (2004-2006)		Integrated into Air Malta in 2006
EU	Netherlands	Basiq Air			2000	2005	100% Transavia (owned 100% by KLM and then Air France-KLM, 2000-2005)		Merged into Transavia in 2005
EU	Netherlands	Dutchbird		5D	2000	2004			
EU	Netherlands	Transavia.com	TRA	HV	1966		100% KLM (min 40%, 1988-2004), 100% Air France-KLM (2004-)	Transavia Limburg (1965-1966), Transavia Holland (1966-1986), Transavia Airlines (1986-2005)	Merged with Basiq Air and re-branded as Transavia.com in 2005
EU	Netherlands	V Bird		VX	2003	2004			
EU	Norway	Color Air			1998	1999			
EU	Norway	Norwegian Air Shuttle	NAX	DY	1993		5% Finnair (2007-)		Formed in 1993 following collapse of Busy Bee Airlines
EU	Poland	Air Polonia		4P	2001	2004			
EU	Poland	Centralwings		C0	2004	2009	100% LOT Polish Airlines (2004-)		Became a charter-only operation in 2008
EU	Portugal	Hi Fly	HFY	LK	1988			Air Luxor (1988-2005)	Concentrated on charter operations as a result of sale of scheduled operations to Longstock Financial Group in 2006
EU	Romania	Blue Air	JOR	0B	2004				
EU	Russian Federation	SkyExpress	SXR	XW	2006		80% KrasAir-related investors		
EU	Slovak Republic	SkyEurope Airlines	ESK	NE	2001				SkyEurope Holding AG was established in Vienna in 2005
EU	Spain	Clickair	CLI	XG	2006	2009	20% Iberia (voting 80%, 2006-2009)		Merged into Vueling in 2009
EU	Spain	Vueling	VLG	VY	2004		3.7% JetBlue Airways' investors (max 7%, 2004-2009), 45% Iberia (2009-), 5% Nefinsa (parent company of Air Nostrum, 5%, 2009-)		Merged with Clickair in 2009
EU	Sweden	FlyMe		SH	2003	2007			
EU	Sweden	Flynordic		LF	2000	2008	100% Finnair (min 85%, 2003-), 100% Norwegian Air Shuttle (2007-2008)	Nordic AirlinK (2000-2004)	Integrated into Norwegian Air Shuttle in 2008
EU	Sweden	Snalskjutsen			2002	2005	a division of Malmo Aviation (2002-2005)		Integrated into Malmo Aviation in 2005
EU	Sweden	Snowflake			2002	2004	a division of SAS (2002-2004)		Integrated into SAS in 2005
EU	Sweden	Sverigeflyg			2001				Comprises of Blekingeflyg, Gotlandsflyg, Kalmarflyg, Kullaflyg and Sundsvallsflyg
EU	Switzerland	easyJet Switzerland	EZS	DS	1988		100% Trans European Airways (1988-1991), 49% easyJet (min	TEA Basel (1988-1998)	

Area	Country	Airline	ICAO Code	Code	Formed	Ceased	Ownership relations with other airlines	Former names	Notes
							40%, 1998-)		
EU	Switzerland	Flybaboo	BBO	F7	2003				
EU	Switzerland	Helvetic Airways	OAW	2L	2001			Odette Airways (2001-2003)	
EU	Turkey	Atlasjet Airlines	KKK	KK	2001				
EU	Turkey	Corendon Airlines	CAI	7H	2005				
EU	Turkey	Onur Air	OHY	8Q	1992				
EU	Turkey	Pegasus Airlines	PGT	H9	1989		a controlling stake by Aer Lingus (1989-1994)		
EU	Turkey	SunExpress	SXS	XQ	1990		50% THY Turkish Airlines (1990-), 50% Lufthansa (1990-1995, 2007-), 50% Condor (1995-2007)		
EU	United Kingdom	AB Airlines			1992	1999		Air Bristol (1992-1995)	Formed in 1992 by a group of former Brymon Airlines
EU	United Kingdom	Air Scotland			2002	2006			Formed in 2002 for Electra Airlines (Greece); Switched agreement to Air Holland in 2003; Ceased agreement with Air Holland and formed Greece Airways in 2004
EU	United Kingdom	Air Southwest	WOW	WO	2003				
EU	United Kingdom	BMIBaby	BMI	WW	2002		100% Airlines of Britain Group (parent company of BMI British Midland, 2002-)		
EU	United Kingdom	Buzz			1999	2003	100% KLM UK (1999-2003), Ryanair (2003)		Merged into Ryanair in 2003
EU	United Kingdom	Debonair		2G	1995	1999			
EU	United Kingdom	easyJet	EZY	U2	1995		16.9% FL Group (then parent company of Icelandair, min 8.4%, 2005-2006)		
EU	United Kingdom	Flybe	BEE	JY	1979		15% British Airways (2007-)	Jersey European Airways (1979-2000), British European Airways (2000-2002)	Merged with Spacegrand Aviation in 1985, Merged with BA Connect in 2007
EU	United Kingdom	FlyGlobespan	GSM	Y2	2002				
EU	United Kingdom	GO		GO	1997	2002	100% British Airways (1997-2001), 100% easyJet (2002)		Merged into easyJet in 2002
EU	United Kingdom	Jet Green			2004	2004			

Area	Country	Airline	ICAO Code	Code	Formed	Ceased	Ownership relations with other airlines	Former names	Notes
EU	United Kingdom	Jet2.com	EXS	LS	2002		a division of Channel Express (2002-2006)		Channel Express was rebranded and replaced by Jet2.com in 2006
EU	United Kingdom	Manx2		NM	2006				
EU	United Kingdom	Monarch Scheduled		ZB	2004		a division of Monarch Airlines (2004-)		
EU	United Kingdom	Mytravellite			2002	2005	100% Mytravel Airways (2002-2005)		Integrated into Mytravel Airways in 2003
EU	United Kingdom	Now Airlines			2002	2004			Never started
EU	United Kingdom	Thomson Airways	TOM	BY	2004		100% TUI AG (2004-2007), TUI Travel Plc (2007-)	Thomsonfly (2004-2008)	Merged with Britannia Airways in 2005, Merged with First Choice Airways to form Thomson Airlines in 2008
EU	United Kingdom	XL Airways		JN	1994	2008	100% Sky Airlines Cyprus (Libra Group, min 33%, 2000-2004), 100% Air Atlanta Icelandic (Avion Group, min 40.5%, 2004-2006)	Sabre Airways (1994-2002), Excel Airways (2002-2006)	
LA	Brazil	Azul Linhas Aereas Brasileiras SA	AZU	AD	2008				
LA	Brazil	BRA Transportes Aéreos	BRB	7R	1999	2007		Brasil Rodo Aéreo (1999-2006)	
LA	Brazil	GOL Transportes Aéreos	GLO	G3	2000				Acquired Varig in 2007 (but continue a separate operation)
LA	Brazil	OceanAir	ONE		2002				
LA	Brazil	Webjet Linhas Aéreas	WEB	WJ	2005				
LA	Columbia	Easy Fly	EFY	EF	2007				
LA	Mexico	AeroCalifornia	SER	JR	1982				
LA	Mexico	Alma de Mexico		C4	2006	2008			
LA	Mexico	Aviacsa	CHP	6A	1990		Aeroexo (1994-)		
LA	Mexico	Avolar	VLI	V5	2005	2008			
LA	Mexico	Azteca Airlines (Lineas Aereas Azteca)	LCD	ZE	2000				Formed in 2000 after TAESA closed down
LA	Mexico	Click Mexicana		QA	1975		100% Mexicana (parent company CINTRA and later Grupo Posada, 1990-)	Aerocaribe (1975-2005)	Re-branded as low-cost operator Click Mexicana in 2005
LA	Mexico	Interjet		4O	2005				
LA	Mexico	Viva Aerobus	VIV	VB	2006				
LA	Mexico	Volaris	VOI	Y4	2005				Formed from proposed low-cost carrier Vuelamex
ME	Kuwait	Jazeera Airways	JZR	J9	2004				

Area	Country	Airline	ICAO Code	Code	Formed	Ceased	Ownership relations with other airlines	Former names	Notes
ME	Saudi Arabia	NAS Air	KNE	XY	2005				
ME	Saudi Arabia	Sama	SMY	ZS	2006				
ME	United Arab Emirates	Air Arabia	ABY	G9	2003				Based in Sharjah
ME	United Arab Emirates	Fly Dubai	FDB		2008		100% Dubai Government (who owns Emirates)		
NA	Canada	Air Canada Tango			2001	2004	a division of Air Canada (2001-2004)		Dissolved in 2004 (but Air Canada still advertises "Tango" as a type of fare on its regular services)
NA	Canada	CanJet Airlines	CJA	C6	1999				Merged into Canada 3000 in 2001; Restarted in 2002; Became a charter-only operation in 2006
NA	Canada	Harmony Airways		HQ	2002	2007		HMY Airways (2002-2004)	Ceased scheduled operations in 2007
NA	Canada	Jetsgo		SG	2002	2005			
NA	Canada	Sunwing Airlines	SWG	WG	2005				
NA	Canada	Westjet Airlines	WJA	WS	1995				
NA	Canada	ZIP		3J	2002	2004	100% Air Canada (2002-2004)		
NA	Canada	Zoom Airlines	OOM	Z4	2002	2008			
NA	United States	Access Air	CYD	ZA	1996	2001			Chapter 11 bankruptcy protection in 1999
NA	United States	Air South	KKB	WV	1993	1997			
NA	United States	AirTran Airways	TRS	FL	1992		100% AirTran Corp (parent company of Mesaba Airlines, 1994-1995)	Conquest Sun (1992-1994)	AirWays Corporation (holding company) merged with ValuJet and became AirTran Holdings Inc in 1997 (ValuJet became AirTran Airlines)
NA	United States	Allegiant Air	AAY	G4	1997			WestJet Express (1997-1998)	Chapter 11 bankruptcy protection in 2000
NA	United States	ATA Airlines	AMT	TZ	1973	2008		American Trans Air (ATA, 1973-2003)	Chapter 11 bankruptcy protection from 2004 to 2006
NA	United States	Continental Lite		CO	1993	1995	a division of Continental Airlines (1993-1995)		Integrated into Continental Airlines in 1995
NA	United States	Delta Express		DL	1996	2003	100% Delta Air Lines (1996-2003)		Replaced by Song in 2003
NA	United States	Eastwind Airlines	SGR	W9	1993	1999			
NA	United States	Frontier Airlines	FFT	F9	1994		100% Republic Airways Holdings (2009-)		
NA	United States	Go!		YV	2006		100% Mesa Air Group (2006-)		
NA	United States	Independence Air	IDE	DH	1989	2006		Atlantic Coast Airlines (1989-2004)	Atlantic Coast Airlines had been operated as United Express and Delta Connection
NA	United States	JetBlue Airways	JBU	B6	1998		19% Lufthansa (2008-)		
NA	United States	Kiwi International Airlines	KIA	KP	1992	1999			Ceased operations in 1996 and 1999
NA	United States	Laker Airways	LBH		1995	1997			

Area	Country	Airline	ICAO Code	Code	Formed	Ceased	Ownership relations with other airlines	Former names	Notes
NA	United States	Metrojet		US	1998	2001	100% US Airways		Integrated into US Airways in 2001
NA	United States	Midway Airlines	MDW	ML	1976	1991			
NA	United States	Midwest Airlines	MEP	YX	1983		47% Northwest Airlines (through Midwest Air Partners, 2008-)	Midwest Express (1983-2003)	
NA	United States	Morris Air	MSS		1984	1994	100% Southwest Airlines (1993-1994)		Merged into Southwest Airlines in 1994
NA	United States	National Airlines	NAN	N7	1995	2002			
NA	United States	New York Air			1980	1987	100% Texas Air Corporation (1980-1987)		Merged into Continental Airlines in 1987
NA	United States	Pacific Southwest Airlines	PSX	PS	1949	1988	100% USAir (1986-1988)		Merged into USAir in 1988
NA	United States	People Express		PE	1981	1987	100% Texas Air Corporation (1986-1987)		Merged with Frontier Airlines in 1985 and Britt Airways and Provincetown-Boston Airways in 1986; Merged into Continental Airlines in 1987
NA	United States	Pro Air	PSZ	P9	1996	2000			
NA	United States	Reno Air	ROA	QQ	1990	1999			American Airline acquired 100% and absorbed in 1999
NA	United States	Shuttle by United		UA	1994	2001	100% United Airlines (1994-2001)		Dubbed as U-2; Integrated into United Airlines in 2001
NA	United States	Skybus Airlines	SKB	SX	2004	2008			
NA	United States	SkyValue USA		XP	2006	2007			
NA	United States	Song		DL	2002	2006	100% Delta Air Lines (2002-2006)		Integrated into Delta Air Lines in 2006
NA	United States	Southwest Airlines	SWA	WN	1967			Air Southwest (1967-1971)	Merged with Morris Air in 1994
NA	United States	Spirit Airlines	NKS	NK	1980			Charter One (1980-1992)	
NA	United States	Sun Country Airlines	SCX	SY	1982				
NA	United States	Ted		UA	2003	2009	a division of United Airlines (2003-2009)		Integrated into United Airlines in 2009
NA	United States	Tower Air	TOW	FF	1982	2000			
NA	United States	USA 3000	GWY	U5	2001				Brendan Airways d/b/a USA 3000 Airlines
NA	United States	ValuJet	VJA	J7	1993	1997			Merged into AirWays Corp (AirTran Airways) in 1997
NA	United States	Vanguard	VGD	NJ	1994	2002			
NA	United States	Virgin America	VRD	VX	2004		25% Virgin Group (2004-)		
NA	United States	Western Pacific	KMR	W7	1994	1998			