

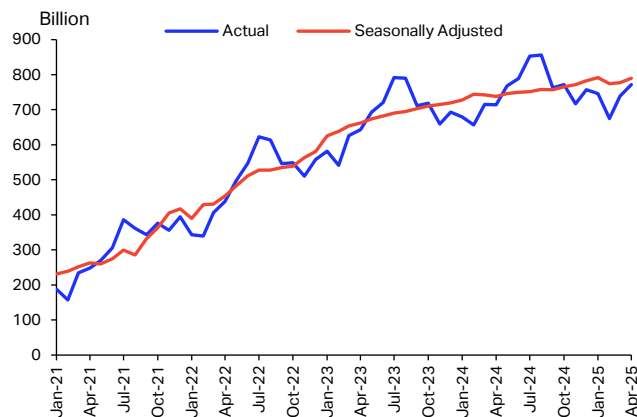
## Global air travel regained momentum

- Industry-wide Revenue Passenger Kilometers (RPK) increased 8.0% year-on-year (YoY) in April, the strongest growth since January.
- International RPK rose 10.8% YoY, outpacing the 8.5% increase in capacity, which boosted passenger load factor (PLF) to 84.1%, the highest April PLF recorded in the international market.
- All regions posted growth, with [Asia Pacific](#) and [African](#) airlines gaining the most.
- India and Brazil led domestic market growth, while the US posted its third straight month of YoY traffic declines.
- The number of passenger flights scheduled worldwide is expected to expand 3.6% YoY in June, following a 3.1% growth in May.

### Global air travel regained momentum in April...

Global passenger traffic rose 8.0% YoY in April, up from roughly 3% growth in both February and March, with RPK reaching 772 billion (Chart 1). April also recorded the strongest month-on-month (MoM) increase in demand so far this year, with seasonally adjusted RPK rising 1.7% from March.

**Chart 1: Global RPK, billion**



Source: IATA Sustainability and Economics, IATA Information and Data - Monthly Statistics

April also marked the highest MoM expansion this year on the supply side, with ASK growing 1.0% MoM seasonally adjusted. Total capacity rose by 6.5% compared to April 2024. As this growth remained below the pace of demand, the global PLF improved by 1.1 percentage points YoY to 83.6%. This was a full three percentage points up from March and the

highest PLF recorded for the month of April since at least 2010.

### ... led by demand surge in international markets

International traffic saw a strong 10.8% YoY increase in demand, making it the main driver of overall industry growth (Chart 2). This traffic surge also led to a significant improvement in seat occupancy, with international PLF rising 1.7 percentage points YoY to 84.1%. This was a 4.5 percentage points jump from March and is the first time that international PLF exceeded 84% in April, even before the peak summer travel season. Capacity rose by 8.5% YoY but remained below demand, supporting the PLF gain.

[Asia Pacific](#) carriers recorded the highest international PLF among all regions at 85.3% in April, and most regions remained above 83%. International PLF rose by more than one percentage point YoY across five of the six regions, with [Latin American](#) airlines being the only exception, posting a slight decline.

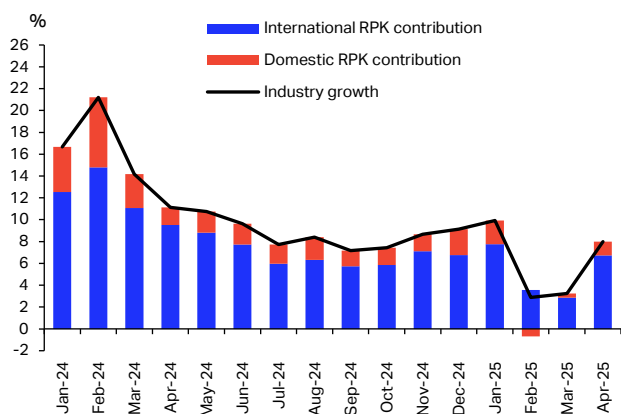
The domestic market contributed less to total growth but remained stable. Passenger traffic rose by 3.3% YoY, closely matched by a 3.1% increase in capacity, keeping PLF steady at 82.7%.

### Air passenger market in detail - April 2025

	World share <sup>1</sup>	April 2025 (% year-on-year)				April 2025 (% year-to-date)			
		RPK	ASK	PLF (%-pt)	PLF (level)	RPK	ASK	PLF (%-pt)	PLF (level)
<b>TOTAL MARKET</b>	<b>100.0%</b>	<b>8.0%</b>	<b>6.5%</b>	<b>1.1%</b>	<b>83.6%</b>	<b>6.0%</b>	<b>5.4%</b>	<b>0.5%</b>	<b>81.8%</b>
International	61.8%	10.8%	8.5%	1.7%	84.1%	8.6%	7.4%	0.9%	81.7%
Domestic	38.2%	3.3%	3.1%	0.1%	82.7%	2.0%	2.1%	-0.1%	82.1%

<sup>1</sup>% of industry RPK in 2024

**Chart 2: Domestic and International traffic contribution to industry-wide RPK growth, YoY, %**



Source: IATA Sustainability and Economics, IATA Information and Data - Monthly Statistics

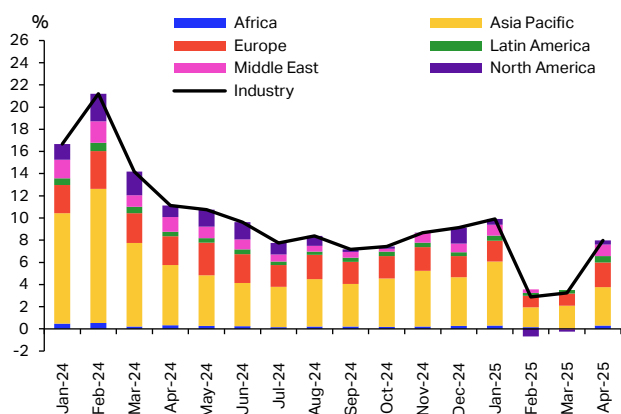
### All regions posted growth

Passenger traffic increased across all regions in April, including **North America**. After two consecutive months of contraction, **North American** airlines returned to positive territory with a 1.6% YoY increase. Still, seat capacity grew at a faster pace, rising 3.2% during the same period. It led to a slight decline in PLF to 81.9%, the only YoY decrease among all regions.

Most of the traffic gain for **North American** carriers came from international routes, where traffic rose 5.4% YoY. Although this was the slowest international growth among all regions, it was enough to offset yet another contraction in the US domestic market.

**European** airlines also posted single-digit growth, with traffic up 8.3% YoY. Capacity increased by 6.6%, allowing PLF to rise 1.3 percentage points to 85.1%, the highest among all regions in April.

**Chart 3: Regional contribution to industry-wide RPK growth, YoY, %**



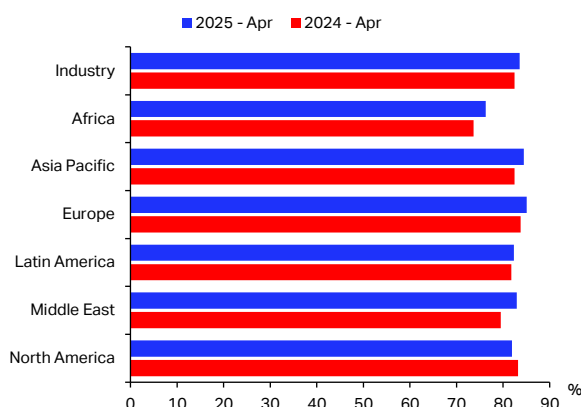
Source: IATA Sustainability and Economics, IATA Information and Data - Monthly Statistics

All other regions recorded double-digit growth. **Asia Pacific** airlines contributed the most to global growth, supported by their share of one-third of the global

market (Chart 3). Passenger traffic carried by these airlines rose 10.6% YoY, while capacity increased 7.9%. This pushed PLF up by two percentage points from a year ago to 84.4%, setting a new high for the month of April, since at least 2010.

**African** airlines benefited from the most rapid expansion among all regions, with passenger traffic surging by 14.2% YoY. This was the first MoM increase after two consecutive declines in February and March, in seasonally adjusted terms. Capacity expanded at a slightly lower rate, lifting PLF by 2.6 percentage points to 76.3% (Chart 4). **Middle Eastern** airlines followed with an 11.3% increase in traffic. Capacity rose at a slower, single-digit rate, pushing PLF up by more than three percentage points to 82.9% in April. For **Latin American** airlines, growth was more balanced. Traffic grew 10.9% YoY, matched by a 10.1% increase in capacity. As a result, PLF edged up slightly to 82.3%.

**Chart 4: Regional and industry passenger load factors, RPK share of ASK, %**



Source: IATA Sustainability and Economics, IATA Information and Data - Monthly Statistics

### India and Brazil led domestic market growth

Global domestic aviation markets continue to develop unevenly. Overall growth was held back by persistent weakness in the US, the world's largest domestic market (Chart 5). Domestic passenger traffic in the US declined YoY for the third consecutive month in April. Seasonally adjusted data reveal MoM contractions since January, except for a brief uptick in March 2025.

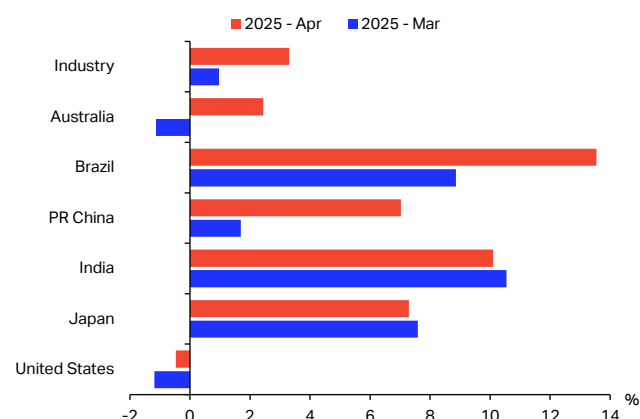
The US was the only major domestic market to post a YoY decline in April. All other key markets expanded. Among them, China, the second largest domestic market, reported a 7.0% YoY increase in RPK, outpacing a 3.7% rise in capacity and resulting in a PLF of 83.9%, the second highest among major markets.

The highest PLF was obtained in the Indian domestic market, exceeding 85% in April. It was the only market to achieve double-digit YoY increases in both traffic and capacity in all four months so far in 2025.

Strong momentum is also evident in Brazil's domestic market, where traffic increased 13.5% YoY, the fastest pace among major markets. This growth extended a streak of uninterrupted YoY increases since January 2023. Capacity has similarly expanded for ten straight months.

On the other hand, the domestic market in Australia returned to growth in April after consecutive contractions in February and March. The 2.4% YoY rise in traffic came amid continued capacity declines following the ceasing of operations by several domestic airlines, helping to sustain a solid PLF of 81.5%.

**Chart 5: Domestic RPK growth by market, YoY, %**



Source: IATA Sustainability and Economics, IATA Information and Data - Monthly Statistics

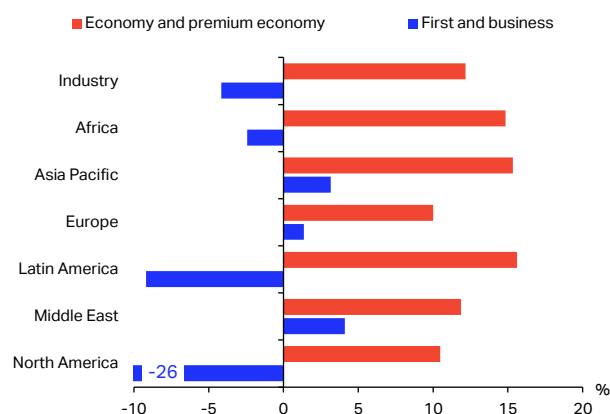
### Economy class led international air travel growth

Over 90% of international air travel takes place in the economy and premium economy classes. In April, these cabin classes drove international market growth with a 12.2% YoY increase. [Latin American](#) airlines led with a 15.6% gain, and [Asia Pacific](#) carriers followed with a 15.3% rise. Other regions also saw expansion in the economy class of between 10% and 15% (Chart 6).

Regarding traffic in the first and business classes, RPK declined by 4.2% YoY globally, the second consecutive annual drop. Half of the regions reported declines. [North American](#) airlines suffered the steepest contraction, with traffic in these classes falling more than a quarter from last year, following a similar decline in March.

In [Latin America](#) and [Africa](#), traffic in the first and business classes contracted, though only by single digits. [European](#) airlines, which hold the largest share of the international business segment, posted a 1.4% YoY increase. [Asia Pacific](#) and [Middle Eastern](#) airlines also reported modest gains.

**Chart 6: International RPK growth by cabin class and airline region of registration, YoY, %**

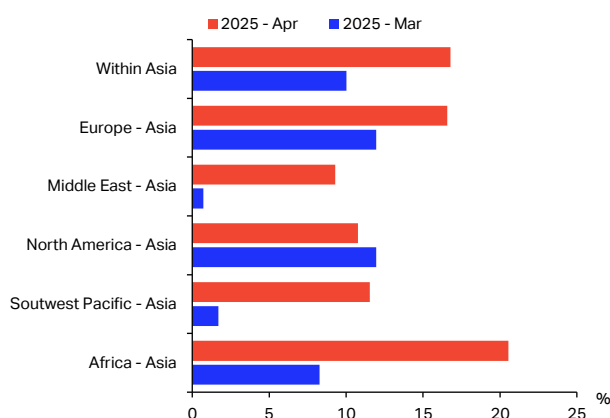


Source: IATA Sustainability and Economics, IATA Information and Data - Monthly Statistics

International air traffic from [Asia Pacific](#) saw robust growth across all major routes in April (**Chart 7**). Traffic within [Asia](#), accounting for over 40% of international traffic carried by airlines registered in the region, has maintained strong momentum this year. The only exception was February, when the shift of the Lunar New Year to January softened the increase to a still impressive 9.7%. Growth rebounded to 10.0% in March and surged to 16.8% in April.

The [Europe-Asia](#) corridor followed closely with a 16.6% YoY rise in April, continuing its streak of double-digit gains. Traffic to the [Middle East](#) rose 9.3%, a sharp improvement from less than 1% growth in March 2025. Other regional connections also showed strength, with passenger traffic rising 11.5% to the [Southwest Pacific](#) and 20.5% to [Africa](#), both accelerated from March. Routes between [Asia](#) and [North America](#) were the only ones to experience a modest deceleration, yet they still managed to match the world average growth in international markets at 10.8% YoY.

**Chart 7: RPK growth in Asia Pacific international route areas, YoY, %**

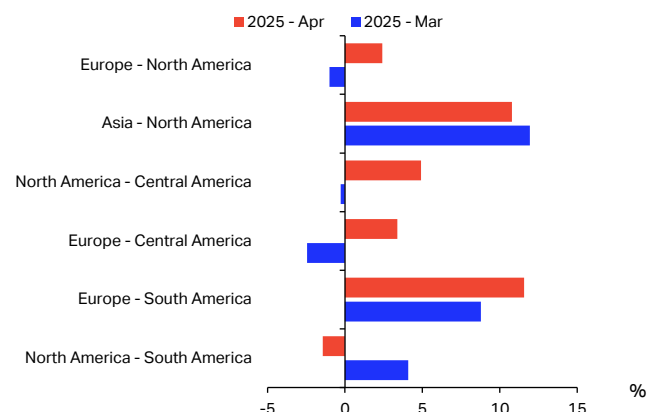


Source: IATA Sustainability and Economics, IATA Information and Data - Monthly Statistics

Route areas are ordered by size, from larger to smaller

Several key business travel routes serving the [Americas](#) returned to positive territory in April after contractions in March this year. The [trans-Atlantic](#) corridor, the busiest route connecting to the [Americas](#), grew 2.4%, reversing a 1.0% decline in the previous month. Traffic between [Central America](#) and [North America](#) rose 4.9% YoY, while the [Central America–Europe](#) route increased 3.4%. These gains marked the first month of growth for both routes, following back-to-back declines in February and March.

**Chart 8: RPK growth in selected Americas international route areas, YoY**



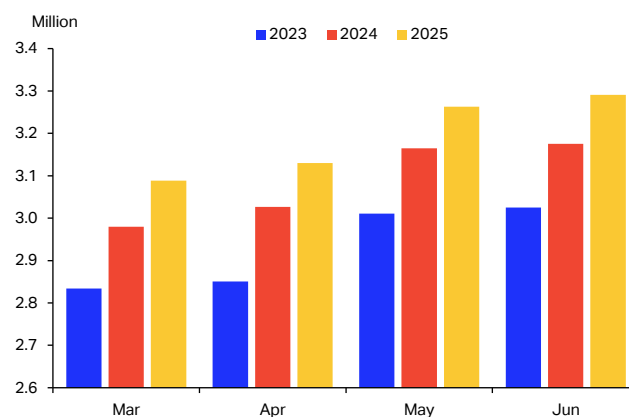
Source: IATA Sustainability and Economics, IATA Information and Data - Monthly Statistics  
Route areas are ordered by size, from larger to smaller

The strongest performance came from [Europe–South America](#) traffic, which continued its uninterrupted expansion since 2021, with an 11.6% YoY increase in April. In contrast, travel between [North and South](#)

[America](#) remained volatile, posting a 1.4% decline in April.

The number of flights scheduled worldwide expanded 3.4% YoY in April and 3.1% YoY in May (Chart 9). For June, current schedules indicate 3.6% more flights compared to a year ago, driven mostly by a 4.7% rise in international markets, while the number of domestic flights scheduled rose by 3.1%. Within international markets, the strongest growth is expected in flights operating within the [Northeast Asia](#) region, 17% up YoY in June. Among smaller international routes, the most significant increases are planned between [Northeast Asia](#) and [Central America](#), and between [Central Asia](#) and [North Africa](#). In both cases, seat capacity will be more than doubled compared to the same period last year.

**Chart 9: Industry-wide scheduled flights**



Sources: IATA Sustainability and Economics, OAG schedules

## Air passenger market in detail - April 2025

	<i>World share</i> <sup>1</sup>	April 2025 (% year-on-year)				April 2025 (% year-to-date)			
		RPK	ASK	PLF (%-pt)	PLF (level)	RPK	ASK	PLF (%-pt)	PLF (level)
<b>TOTAL MARKET</b>	<b>100.0%</b>	<b>8.0%</b>	<b>6.5%</b>	<b>1.1%</b>	<b>83.6%</b>	<b>6.0%</b>	<b>5.4%</b>	<b>0.5%</b>	<b>81.8%</b>
Africa	2.2%	14.2%	10.3%	2.6%	76.3%	9.1%	7.3%	1.2%	74.5%
Asia Pacific	33.5%	10.6%	7.9%	2.0%	84.4%	9.4%	7.2%	1.7%	84.4%
Europe	26.7%	8.3%	6.6%	1.3%	85.1%	6.3%	5.7%	0.5%	80.4%
Latin America	5.3%	10.9%	10.1%	0.6%	82.3%	7.4%	8.7%	-0.9%	82.0%
Middle East	9.4%	11.3%	6.7%	3.4%	82.9%	6.0%	4.1%	1.4%	80.7%
North America	22.9%	1.6%	3.2%	-1.3%	81.9%	0.0%	1.8%	-1.4%	80.7%
<b>International</b>	<b>61.8%</b>	<b>10.8%</b>	<b>8.5%</b>	<b>1.7%</b>	<b>84.1%</b>	<b>8.6%</b>	<b>7.4%</b>	<b>0.9%</b>	<b>81.7%</b>
Africa	1.8%	13.6%	8.9%	3.1%	76.3%	8.5%	6.3%	1.5%	74.1%
Asia Pacific	16.8%	14.4%	12.7%	1.3%	85.3%	13.9%	12.6%	1.0%	85.3%
Europe	23.5%	9.4%	7.7%	1.3%	84.5%	7.5%	6.6%	0.6%	79.7%
Latin America	2.8%	13.9%	14.6%	-0.6%	83.2%	10.4%	13.1%	-2.0%	82.6%
Middle East	9.0%	11.2%	6.6%	3.4%	83.1%	5.8%	4.1%	1.3%	80.7%
North America	7.9%	5.4%	2.6%	2.2%	83.4%	2.0%	0.6%	1.1%	81.9%
<b>Domestic</b>	<b>38.2%</b>	<b>3.3%</b>	<b>3.1%</b>	<b>0.1%</b>	<b>82.7%</b>	<b>2.0%</b>	<b>2.1%</b>	<b>-0.1%</b>	<b>82.1%</b>
Dom. Australia	0.8%	2.4%	-2.2%	3.7%	81.5%	1.5%	-2.6%	3.1%	78.8%
Domestic Brazil	1.1%	13.5%	7.7%	4.2%	81.1%	9.1%	6.8%	1.7%	81.2%
Dom. China P.R.	11.3%	7.0%	3.7%	2.6%	83.9%	3.7%	0.8%	2.3%	84.2%
Domestic India	1.6%	10.1%	11.3%	-0.9%	85.7%	12.1%	13.0%	-0.7%	86.9%
Domestic Japan	1.0%	7.3%	2.3%	3.4%	73.6%	8.0%	2.4%	4.1%	78.8%
Domestic US	14.4%	-0.5%	3.4%	-3.1%	80.6%	-1.1%	2.3%	-2.7%	79.7%

<sup>1</sup>% of industry RPK in 2024

Note: the six domestic passenger markets for which broken-down data are available account for approximately 30.2% of global total RPKs and 79.1% of total domestic RPKs

**Note:** The total industry and regional growth rates are based on a constant sample of airlines combining reported data and estimates for missing observations. Airline traffic is allocated according to the region in which the carrier is registered; it should not be considered as regional traffic. Historical statistics are subject to revision.

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