Air Passenger Market Analysis

April 2026

April Sees the First Traffic Contraction Since Covid

- Industry-wide Revenue Passenger Kilometers (RPK) contracted by 3.4% year-on-year (YoY) in April, while the Passenger Load Factor (PLF) dropped to 83.1%.
- Traffic carried by Middle Eastern carriers contracted by 46.6% YoY, amid the impact of the conflict in the region. Airlines from other regions saw a moderation in growth momentum compared with March 2026.
- All major domestic markets either contracted or saw slower growth compared with March.
- International traffic weakened further in April, with Middle Eastern carriers continuing to see declining volumes, while growth moderated across all other regions.
- The recovery in global scheduled seat capacity is delayed until June.

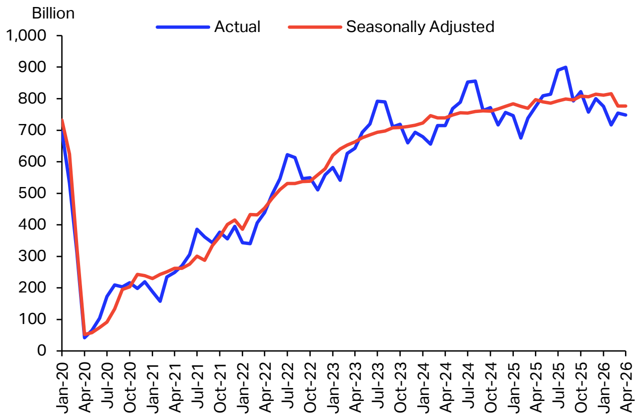
Passenger traffic contracts for the first time since covid

Global passenger traffic fell by 3.4% YoY in April, marking the first YoY contraction since the post-pandemic recovery. The decline was driven by Middle East contracting by 46.6% and North America slowing by 0.3% YoY. Airline operations continued to face disruption from the Iran war, weighing on both capacity and demand. Higher oil prices added further pressure on operations.

Industry-wide revenue passenger kilometers totaled 748 billion in April **(Chart 1)**. On a seasonally adjusted basis, global passenger traffic declined by 2.7% YoY and by 0.1% compared with March 2026.

Industry-wide capacity, measured in available seat kilometers, fell by 2.9% YoY. With demand weakening more than capacity, the PLF declined by 0.4 percentage points to 83.1%, the first YoY fall in PLF in 2026.

Chart 1: Global RPK, billion



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

Air passenger market in detail - April 2026

	World	April 2026 (year-on-year, %)				April 2026 (year-to-date, %)			
	share, % [1]	RPK	ASK	PLF (%-pt)	PLF (level)	RPK	ASK	PLF (%-pt)	PLF (level)
TOTAL MARKET	**100.0**	**-3.4**	**-2.9**	**-0.4**	**83.1**	**2.1**	**1.0**	**0.9**	**82.6**
International	62.8	-5.3	-5.1	-0.2	83.9	1.5	-0.1	1.3	82.8
Domestic	37.2	0.0	0.8	-0.7	81.9	3.1	2.8	0.2	82.3

[1] % of industry RPK in 2025

Domestic growth falters as international contraction deepens

Domestic passenger traffic slipped into negative territory in April after a sharp slowdown, while the contraction in international traffic deepened. Domestic traffic declined by 0.04% YoY in April, down from a 6.6% expansion in March, as growth across all major domestic markets either decelerated or turned negative. Capacity on domestic routes increased by 0.8% YoY, resulting in a 0.7 percentage point decline in the PLF to 81.9%.

In the international segment, the traffic contraction worsened from 0.6% YoY in March to 5.3% YoY in April. Growth among airlines in all regions slowed, while international traffic carried by Middle Eastern carriers nearly halved YoY. Capacity on international routes fell by 5.1% YoY. With demand declining more than capacity, the international PLF dropped by 0.2 percentage points to 83.9%.

Traffic by Middle Eastern and North American carriers contracts, while other regions experience slower growth

Passenger traffic showed mixed performance across regions in April 2026. Traffic carried by Middle Eastern and North American airlines contracted, while other regions recorded a moderation in YoY growth momentum compared with March **(Chart 2)**. Latin American and Caribbean airlines led demand growth, while European carriers posted the slowest expansion. The PLFs increased in all regions except Middle East and North America, pulling the industry-wide PLF down to 83.1% **(Chart 3)**.

Latin American and Caribbean carriers saw passenger traffic increase by 5.0% YoY, placing it as the fastest-growing region. International traffic continued to lead the growth, up by 8.9% YoY and accounting for nearly 95% of the region's YoY RPK increase. Capacity rose by a more moderate 4.3% YoY rate, pushing PLF up by 0.5 percentage points to 82.9%. This represents the highest PLF on record for the month of April for the region.

Passenger traffic for African airlines increased by 2.8% YoY. Capacity expanded by 2.0% YoY, slightly below demand growth, lifting PLF up by 0.6 percentage points to 77.7%.

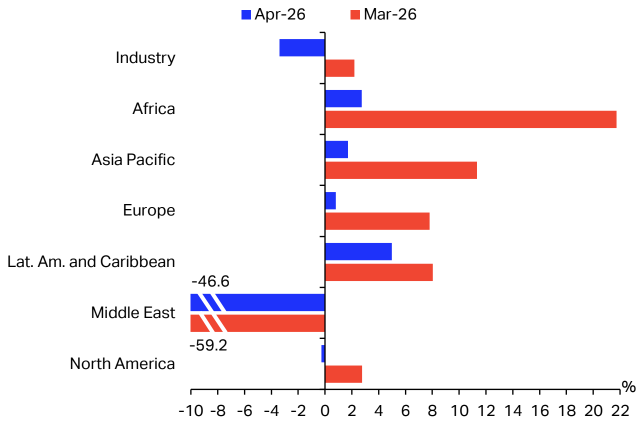
Asia Pacific airlines posted a 1.7% YoY increase in passenger traffic, a sharp slowdown from 11.3% in March. Growth was driven primarily by the international market, which accounted for nearly 95% of the region's YoY RPK increase. Despite the deceleration, airlines in the region remained the largest contributor to global passenger traffic. Capacity expanded by 0.7% YoY, below demand growth, lifting PLF by 0.9 percentage points to 85.1%. This was both the largest PLF increase in PLF among regions and a record April level for Asia Pacific carriers.

European airlines posted a modest 0.8% YoY increase in passenger traffic, supported by a 0.9% rise in international demand. Capacity grew by 0.4% YoY, lagging demand and pushing PLF up by 0.4 percentage points YoY to 85.4%. This marks the highest PLF among the regions for April 2026.

Carriers in North America marked a 0.3% YoY decline in passenger traffic, contrasting with 2.8% YoY growth seen in March. The contraction was driven primarily by a 0.6% YoY fall in domestic demand. Capacity increased by 0.3% YoY, despite weaker demand, resulting in a 0.5 percentage point decline in PLF to 81.5%.

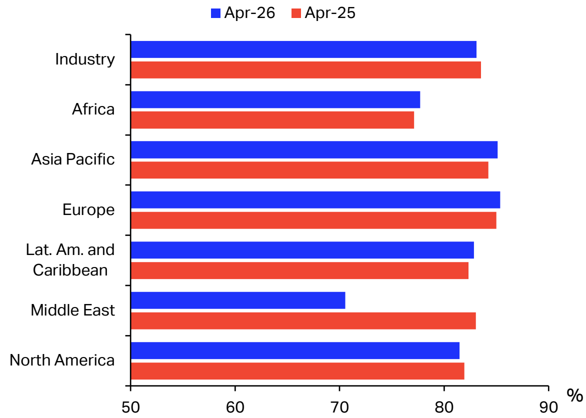
Middle Eastern carriers saw a sharp 46.6% YoY contraction in passenger traffic in April. While still severe, this marked a moderation from the 59.2% YoY decline in March, reflecting the US-Iran ceasefire and the subsequent reopening of regional airspace following heightened geopolitical tensions linked to conflict in Iran. Capacity fell by 37.2% YoY, a slower pace than the drop in demand, driving PLF down by 12.5 percentage points to 70.6%.

Chart 2: Total RPK growth by airline region of registration, YoY, %



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

Chart 3: Regional and industry passenger load factors, RPK share of ASK, %



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

Domestic traffic momentum slows across all markets

Domestic passenger traffic growth slowed across all major domestic markets in April compared to March, with domestic RPK in India, the US, and Australia posting outright contractions **(Chart 4)**. Capacity generally expanded by more than demand, leading to lower PLFs in most regions.

Among the major domestic markets, India recorded the weakest performance, with passenger traffic contracting by 2.9% YoY in April, extending the decline observed in March. At the same time, capacity expanded by 2.3%, resulting in a marked 4.3 percentage point drop in the PLF to 81.6%.

The US domestic market also contracted, with RPK declining by 0.6% YoY. Capacity growth was positive at 1.0% YoY, leading to a 1.2 percentage point decline in PLF to 79.6%.

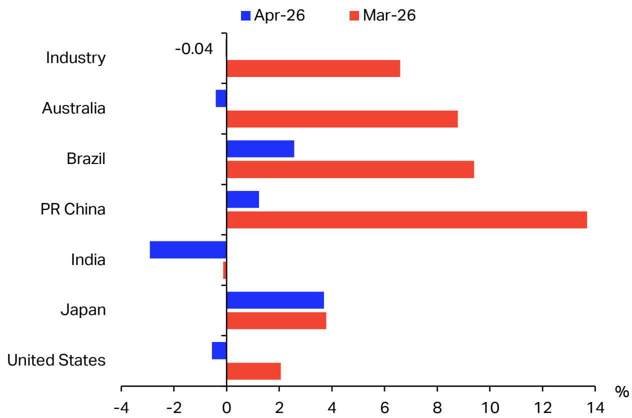
In Australia, domestic traffic growth slowed sharply, slipping into negative territory at –0.4% YoY. This follows a strong March where domestic RPK expanded by 8.8% YoY. Capacity nevertheless continued to expand at 3.8%, resulting in a 3.4 percentage points drop in the PLF to 79.8%.

China recorded modest growth, with domestic passenger traffic slowing to 1.2% YoY in April, a notable slowdown from the 13.7% in March when traffic was boosted by the tail-end of Lunar New Year. Capacity expansion slightly lagged demand, resulting in a 0.2 percentage points increase in the PLF to 84.2%.

Similarly, domestic RPK in Brazil slowed significantly but remained positive, growing at 2.6% YoY in April. This was accompanied by a solid increase in capacity of 4.5% YoY, resulting in a 1.5 percentage points decline in the PLF to 79.6%.

By contrast, passenger volumes in Japan displayed resilience, growing at 3.7% YoY in April, the strongest performance across major domestic markets. Capacity nevertheless declined for the eighth month in a row, pushing the PLF up by 3.7 percentage points to 74.7%.

Chart 4: Domestic RPK growth by market, YoY, %



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

International traffic declined, with differences in regional performance

Airlines across all regions reported slower international traffic growth in April, with the sharp downturn in the Middle East driving an industry-wide contraction of 5.3% YoY **(Chart 5)**. Middle Eastern carriers saw international RPKs decline sharply for a second month in a row, by 48.1% YoY, though the pace of contraction eased from March. Capacity dropped by a more moderate 38.4%, leading to a 13.1 percentage points decline in the PLF to 70.1%.

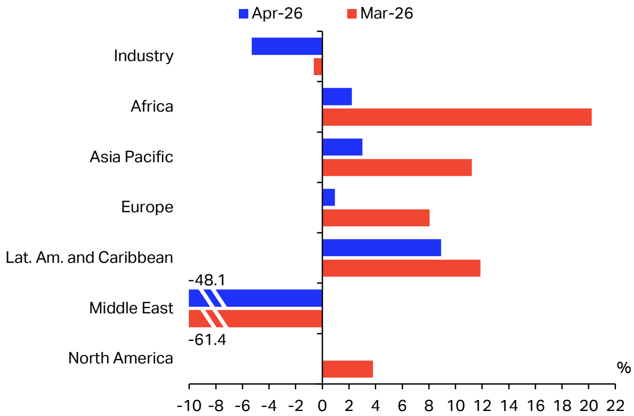
International carriers in other regions reported slower international traffic growth compared with March, pointing to a broader global slowdown and reduced rerouting of passenger flows away from Middle Eastern hub airports.

Airlines in Latin America and the Caribbean delivered the strongest performance among all regions, with international passenger volumes rising 8.9% YoY. Capacity increased by 7.2%, resulting in a 1.4 percentage points increase in the PLF to 84.6%. Asia Pacific carriers also recorded a slowdown, with international traffic growing by 3.0% YoY in April, down from 11.2% YoY in March. Capacity expanded by just 0.7%, lifting the PLF by 1.9 percentage points to 87.5%, the highest across all regions. African airlines also saw a sharp deceleration in international traffic growth, easing to 2.2% YoY following a 20.2%

surge in March. Capacity rose by 1.2% YoY, lifting the PLF to 77.9%, still below the industry average.

European carriers reported modest growth of 0.9% YoY in April, a marked slowdown from 8.1% in March. Capacity increased at a slower pace, resulting in a 0.6 percentage point increase in the PLF to 84.9%, above the global industry average. International traffic carried by airlines registered in North America was flat in April. Capacity declined by 1.1% YoY, which supported a 0.9 percentage point increase in PLF to 83.9%.

Chart 5: International RPK growth by airline region of registration, YoY, %



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

Moderated but still robust growth on Asia Pacific international corridors

Most major international routes serving Asia Pacific posted slower growth in April, following the exceptional performance in March with traffic being diverted from the Middle East **(Chart 6)**. Even so, growth remained strong relative to the first two months of 2026. The Middle East–Asia corridor was the only major route area to see a contraction, with traffic down 40.5% YoY.

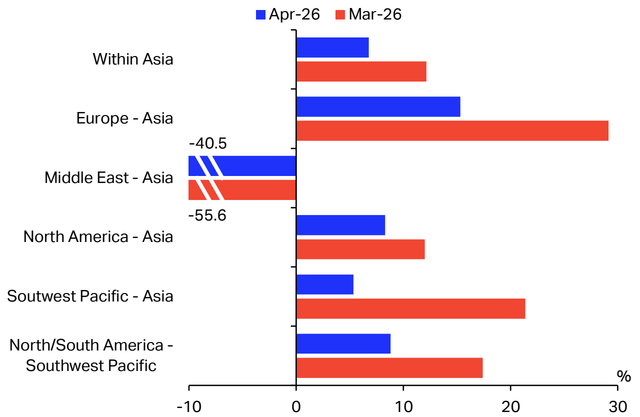
International traffic within Asia grew by 6.8% YoY in April, down from 12.2% in March. Most major markets on this corridor continued to expand, with the notable exception of Japan. Traffic between China and Japan halved YoY in April, due to the ongoing political tensions.

Traffic on the Europe–Asia route maintained strong double-digit growth at 15.3% YoY. Although this was around half the 29.2% YoY recorded in March, the performance continues to reflect the diversion of traffic away from Middle Eastern hubs toward direct services between Europe and Asia.

Traffic between North America and Asia increased by 8.3% YoY in April, easing from 12.0% in March. More pronounced decelerations were observed on the Southwest Pacific–Asia and North and South America–Southwest Pacific corridors. Traffic on these routes rose by 5.3% and 8.8% YoY, respectively, compared with 21.4% and 17.4% in March.

Similar to what was observed in March, the PLFs increased YoY across all major international route areas serving Asia Pacific, with the exception of the Middle East–Asia corridor. On this route, PLFs declined by almost nine percentage points YoY to 74.2%. By contrast, PLFs on both the within Asia and North and South America–Southwest Pacific corridors rose by 2.5 percentage points YoY, reaching 84.9% and 82.9%, respectively.

Chart 6: RPK growth across major Asia Pacific international route areas, YoY, %



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

All major corridors for the Americas contracted or saw slower growth

All major international route corridors serving the Americas either contracted or experienced slower growth in April **(Chart 7)**.

Transatlantic traffic dropped by 2.8% YoY in April. The shift of Easter to early April in 2026 compared with 2025 extended the post-holiday lull in April and weighed on demand, particularly for travel from Europe to North America. Within this corridor, notable traffic declines were recorded from the United Kingdom, France, Germany, the Netherlands, and Switzerland to North America.

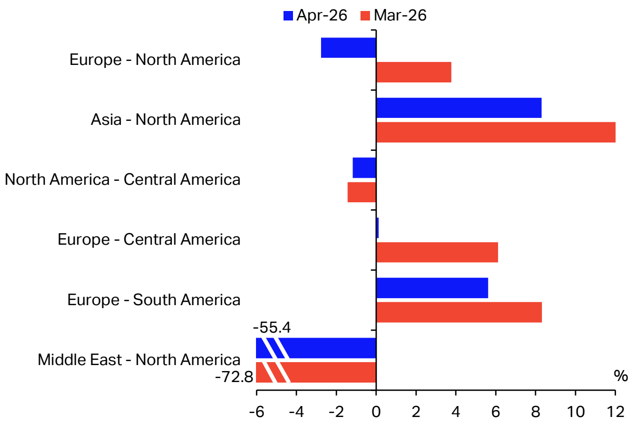
Traffic between North and Central America continued to contract, declining by 1.2% YoY in April. The Middle East–North America corridor contracted sharply, with traffic falling by more than half. While still weak, this represented an improvement compared with the 72.8% contraction in March.

By contrast, traffic between Asia and North America remained strong, growing by 8.3% YoY, the highest rate among major international routes serving the Americas.

Traffic between Europe and Central America stagnated in April, growing by just 0.1% YoY. Performance was stronger on Europe–South America routes, where traffic increased by 5.6% YoY, although this marked a slowdown from 8.3% in March. Among the top destination countries in Latin America on these corridors, traffic contracted to Chile and Costa Rica.

The PLFs on international routes serving the Americas showed mixed performance. The Asia–North America corridor recorded the largest PLF increase, rising by 2.1 percentage points YoY to 87.0%. PLFs on Europe–Central America routes increased by 0.8 percentage points to 91.2%, the highest among major corridors serving the Americas. In contrast, PLFs on Middle East–North America routes fell sharply, declining by 16.3 percentage points YoY to 69.6%.

Chart 7: RPK growth across major Americas international route areas, YoY, %



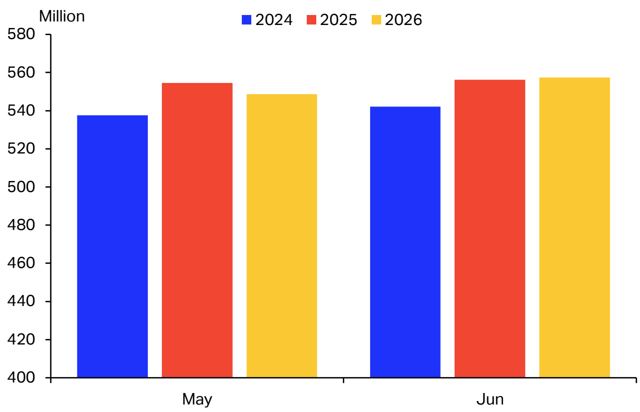
Source: IATA Sustainability and Economics, IATA Information and Data - Monthly Statistics. Route areas are ordered by size, from largest to smallest[1]

Scheduled seats decline in May, fragile recovery expected in June

Global scheduled seat capacity is expected to decline by 1.1% YoY in May, marking a slightly larger contraction than the 0.8% decline observed in April **(Chart 8)**. Recent adjustments to airline schedules indicate that the May recovery previously anticipated in our March analysis has not materialized. This reflects ongoing operational disruptions linked to the Middle East conflict. There were significant capacity reductions on routes to and from the Middle East, where scheduled seats are projected to fall by 26.6% YoY in May.

Looking ahead, current schedules indicate that global seat capacity is expected to grow modestly by 0.2% YoY in June. Capacity to and from the Middle East is projected to contract by 16.2% YoY, representing a partial improvement compared with April. However, the situation remains highly dynamic, and further schedule revisions are likely. These adjustments could affect the fragile recovery in global seat capacity currently anticipated for June.

Chart 8: Industry-wide scheduled seats



Source: IATA Sustainability and Economics, OAG schedules

[1] Note: Europe – Central America routes include flights between Europe and Central America / Caribbean, Bolivia, Colombia, Ecuador, French Guyana, Peru, Surinam or Venezuela; Europe – South America routes include flights between Europe and Argentina, Brazil, Chile, Paraguay or Uruguay.

Air passenger market in detail - April 2026

	World share, %[1]	April 2026 (year-on-year, %)				April 2026 (year-to-date, %)			
		RPK	ASK	PLF (%-pt)	PLF (level)	RPK	ASK	PLF (%-pt)	PLF (level)
TOTAL MARKET	**100.0**	**-3.4**	**-2.9**	**-0.4**	**83.1**	**2.1**	**1.0**	**0.9**	**82.6**
Africa	2.2	2.8	2.0	0.6	77.7	10.0	6.8	2.2	76.9
Asia Pacific	34.4	1.7	0.7	0.9	85.1	5.9	4.4	1.2	85.4
Europe	26.7	0.8	0.4	0.4	85.4	5.1	3.5	1.3	81.4
Latin America and Caribbean	5.4	5.0	4.3	0.5	82.9	7.6	5.5	1.7	83.8
Middle East	9.5	-46.6	-37.2	-12.5	70.6	-23.9	-20.4	-3.6	77.2
North America	21.8	-0.3	0.3	-0.5	81.5	1.4	0.4	0.8	81.6
International	**62.8**	**-5.3**	**-5.1**	**-0.2**	**83.9**	**1.5**	**-0.1**	**1.3**	**82.8**
Africa	1.9	2.2	1.2	0.7	77.9	10.1	5.9	2.9	77.2
Asia Pacific	17.7	3.0	0.7	1.9	87.5	6.8	3.7	2.5	87.7
Europe	23.6	0.9	0.3	0.6	84.9	5.3	3.6	1.3	80.6
Latin America and Caribbean	2.9	8.9	7.2	1.4	84.6	11.4	8.5	2.2	84.9
Middle East	9.1	-48.1	-38.4	-13.1	70.1	-24.8	-21.3	-3.6	77.2
North America	7.6	0.0	-1.1	0.9	83.9	3.1	1.0	1.7	83.5
Domestic	**37.2**	**0.0**	**0.8**	**-0.7**	**81.9**	**3.1**	**2.8**	**0.2**	**82.3**
Australia	0.8	-0.4	3.8	-3.4	79.8	1.6	4.8	-2.4	76.4
Brazil	1.2	2.6	4.5	-1.5	79.6	8.9	7.8	0.8	82.1
China P.R.	11.3	1.2	0.9	0.2	84.2	6.1	5.9	0.1	84.5
India	1.7	-2.9	2.3	-4.3	81.6	0.4	2.3	-1.6	85.3
Japan	1.0	3.7	-1.4	3.7	74.7	2.4	-1.4	3.0	80.8
United States	13.6	-0.6	1.0	-1.2	79.6	0.3	0.0	0.2	80.1

Note 1: % of industry RPK in 2025

Note 2: 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.
Note 3: the six domestic passenger markets for which broken-down statistics are available account for approximately 29.6% of global total RPK and 79.4% of total domestic RPK

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