

Record load factors in August

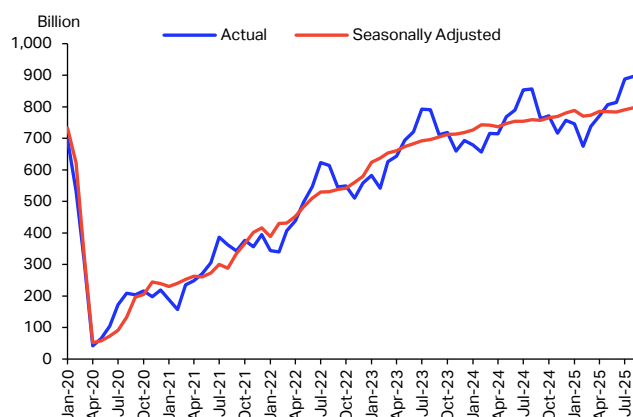
- Global passenger traffic, measured in Revenue Passenger Kilometers (RPK), rose by 4.6% year-on-year (YoY), up from 4.1% in July.
- The industry-wide Passenger Load Factor (PLF) reached a historic high of 86.0%.
- Regional performance was positive across the board, with **African** airlines leading growth at 8.9% YoY.
- Domestic traffic remained subdued, increasing only 1.5% YoY.
- International traffic expanded 6.6% YoY, driven by strong gains from **Asia Pacific** carriers, whose international traffic rose by 9.8%.
- Global flight schedules are projected to grow by 1.2% YoY in September and 3.4% in October.

Growth momentum continued in August

Global passenger traffic, measured in RPK, rose by 4.6% YoY in August, slightly faster than the 4.1% in July, with total RPK reaching 896 billion (Chart 1). After adjusting for seasonal effects, RPK increased by 0.8% month-on-month (MoM) and 5.0% YoY.

Capacity, measured in Available Seat Kilometers (ASK), grew by 4.5% YoY, slightly below the increase in demand, and lifted PLF by 0.1 percentage points to a record high of 86.0% in August.

Chart 1: Global RPK, billion



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

Industry-wide international traffic remained strong in August and rose by 6.6% YoY. International capacity increased by 6.5% YoY. This slightly slower growth in capacity meant that PLF in the international sector inched up 0.1 percentage points YoY to 85.8%, the highest international PLF recorded for the month of August.

On the other hand, domestic passenger traffic only grew 1.5% YoY in August, matching July's pace. This marked the third consecutive month with YoY gains below 2%. Capacity rose by 1.3% YoY, pushing the domestic PLF up 0.1 percentage points to 86.3% - the highest domestic PLF ever recorded for any month.

Overall, international traffic accounted for 87% of the net increase in global RPK, underscoring the dominant role of international markets in driving industry-wide growth. Domestic traffic contributed only 13%, down from 25% a year ago.

Air passenger market in detail - August 2025

	World share, % ¹	August 2025 (year-on-year, %)				August 2025 (year-to-date, %)			
		RPK	ASK	PLF (%-pt)	PLF (level)	RPK	ASK	PLF (%-pt)	PLF (level)
TOTAL MARKET	100.0	4.6	4.5	0.1	86.0	5.0	4.9	0.1	83.4
International	61.8	6.6	6.5	0.1	85.8	6.9	6.6	0.3	83.3
Domestic	38.2	1.5	1.3	0.1	86.3	1.9	2.1	-0.2	83.6

¹% of industry RPK in 2024

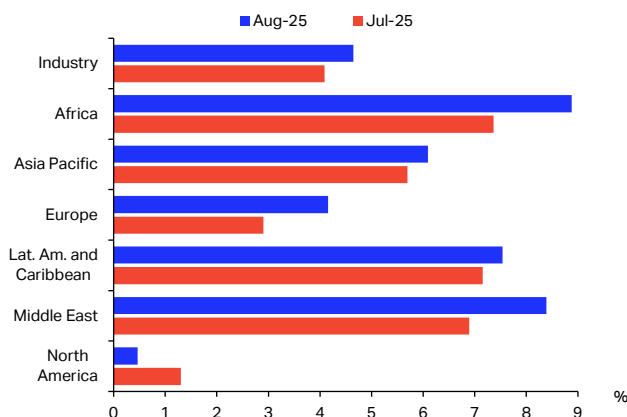
African airlines recorded the fastest growth, while North American airlines lagged with marginal gains

African airlines recorded the highest YoY growth in passenger traffic among all regions, rising 8.9% in August (Chart 2). Middle Eastern airlines followed with an 8.4% YoY upturn in August, highlighting the sector's resilience despite geopolitical challenges.

Latin American and Caribbean airlines posted a 7.5% YoY increase in passenger traffic, thanks to a 9.0% expansion in their international market. Asia Pacific carriers saw traffic rise 6.1% YoY, driven primarily by a 9.8% gain in international traffic. Airlines from the region were the largest contributors to global passenger growth, accounting for approximately 44% of the total RPK increase in August.

Traffic carried by European airlines increased by 4.2% YoY in August, contributing 25% of the global net RPK gains. North American carriers grew by 0.5% YoY – the slowest among regions and down from 1.3% in July. This was largely due to a 0.2% YoY contraction in the US domestic market, which made North America the only region where traffic growth decelerated in August.

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

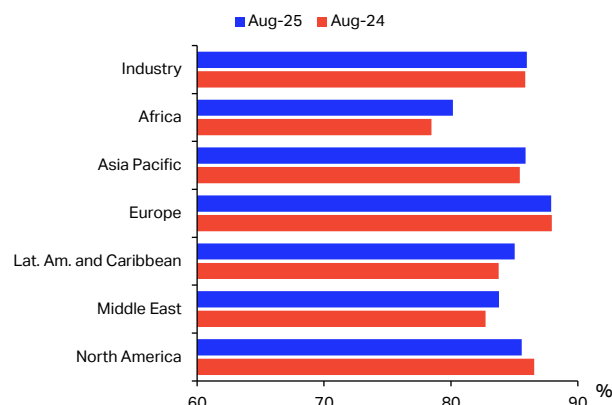


Source: IATA Sustainability and Economics, IATA Information and Data - Monthly Statistics

All regions saw higher PLF YoY in August, except for airlines from North America and Europe (Chart 3). In North America, capacity rose by 1.6% YoY while demand grew only 0.5%, pushing PLF down one percentage point to 85.6%. This marks the seventh straight monthly YoY decline in PLF for North American airlines.

European carriers led with the highest PLF among regions at 87.9%, down 0.1 percentage points from last year's levels. Meanwhile, African airlines posted the lowest PLF at 80.2% but notably surpassed the 80% mark for the first time on record.

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



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

Continued weakness in domestic markets

Industry-wide domestic traffic expanded by 1.5% YoY in August, consistent with the gains in July (Chart 4). The US was the only major domestic market that contracted, down 0.2% YoY after July's brief rebound of 0.5% - revised from 1.5% in July's report. US domestic PLF fell 1.1 percentage points, marking the eighth consecutive month of YoY declines in 2025.

Traffic in China's domestic market rose by 3.4% YoY in August, slightly slower than July's 3.8%. With demand outpacing the 3.1% YoY expansion in capacity, domestic PLF increased by 0.3 percentage points to 85.5%.

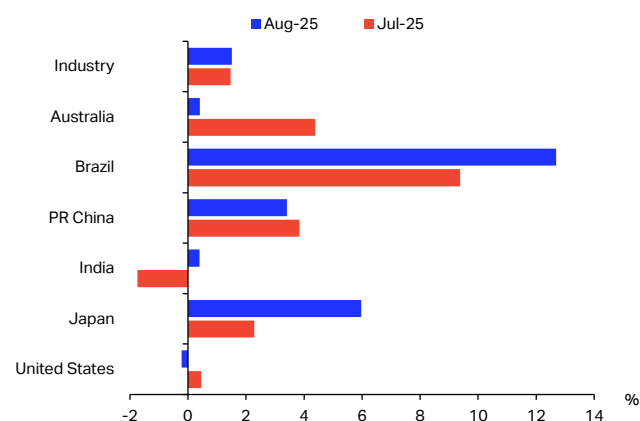
India's domestic traffic grew 0.4% YoY in August, reversing the 1.7% contraction in July. As capacity declined by 0.2% YoY, PLF rose by 0.5 percentage points to 83.2%.

Brazil led all major domestic markets with a 12.7% YoY surge, boosted by government programs promoting tourism. The slower YoY expansion in capacity at 8.1% lifted PLF by 3.4 percentage points to 85.1%.

Domestic traffic in Japan also performed well, up 6.0% YoY on robust international and domestic tourism. Capacity rose by 3.1% YoY, ending three months of contraction. However, with strong demand outpacing supply, PLF climbed 2.4 percentage points YoY to a record 89.6%.

In Australia, domestic traffic grew marginally by 0.4% YoY in August, a sharp slowdown from 4.4% in July. Capacity expanded 3.3% YoY, driving PLF down 2.4 percentage points to 83.4%.

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



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

Accelerated growth in the international sector

Industry-wide international passenger traffic rose by 6.6% YoY in August, up from 5.7% in July (Chart 5). [Asia Pacific](#) airlines led the growth, with RPK rising 9.8% YoY – accelerating from 9.2% recorded in July. This strong demand was supported by a 9.5% YoY increase in international capacity, lifting PLF by 0.2 percentage points to 85.1%. International traffic from [China](#) and [Japan](#), the region's largest source markets, grew by 11.8% and 12.0% YoY, respectively.

International traffic for airlines in [Latin America and the Caribbean](#) recorded 9.0% YoY growth in August. Although slightly below the 9.2% YoY growth recorded in July, it still ranked as the second fastest globally. Meanwhile, airline capacity in the region expanded at a similar pace, up 9.3% YoY. International traffic within the region was particularly strong, with traffic between [Central America](#) and [South America](#) up 20.8% YoY, traffic within [Central America](#) growing 15.5%, and traffic within [South America](#) gaining 13.7%.

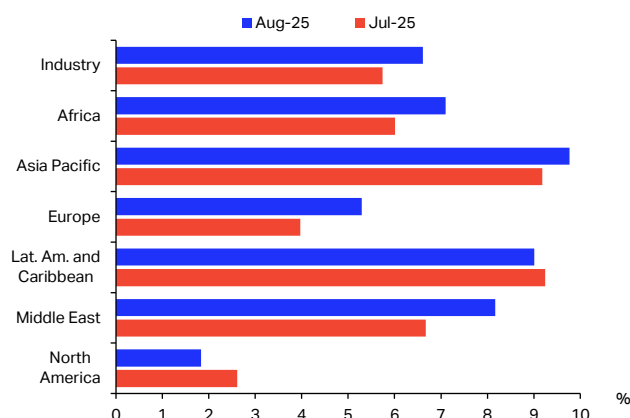
[Middle Eastern](#) airlines saw international traffic rise by 8.2% YoY in August. Capacity grew 6.9% YoY and PLF edged up one percentage point to 83.9%. [African](#) airlines showed a 7.1% YoY increase in international traffic, while capacity expanded at a slower pace of 5.3% YoY. This supported a 1.3 percentage point gain in PLF to 79.7%.

[European](#) carriers posted a 5.3% YoY growth in international traffic in August. Capacity expanded in tandem, keeping international PLF steady YoY at 87.2%. International traffic [within Europe](#), the world's largest international route area, gained 5.7% YoY.

[North American](#) airlines experienced the slowest growth among all regions, with international traffic up just 1.8% YoY. Capacity rose more quickly at 2.6% YoY, leading to a 0.6 percentage point decline in PLF to 87.5%. August marked the fourth consecutive

month of YoY declines in the international PLF of [North American](#) carriers.

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



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

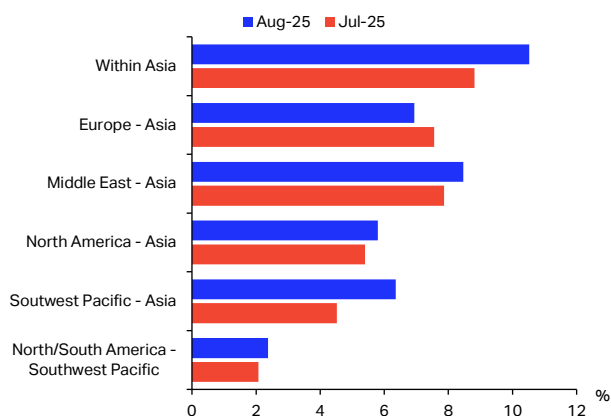
The larger international route areas serving [Asia Pacific](#) performed above the industry average of 6.6% YoY, while smaller corridors saw more modest growth (Chart 6).

International traffic [within Asia](#), the largest international route area for [Asia Pacific](#), expanded by 10.5% YoY in August. International travel from [China](#) and [Japan](#) to the rest of [Asia](#), the two largest origin markets for this sector, increased by 9.0% and 11.6% YoY, respectively. The [Europe – Asia](#) corridor gained 6.9% YoY, while traffic between the [Middle East](#) and [Asia](#) grew by 8.5%.

The [North America – Asia](#) corridor grew by 5.8% YoY. Traffic from [India](#), the largest origin market from [Asia](#) to [North America](#), contracted 6.7% YoY in August. Traffic between [Southwest Pacific](#) and [Asia](#) increased by 6.4% YoY, while the [North/South America – Southwest Pacific](#) corridor expanded by 2.4%, the slowest among major international routes serving [Asia Pacific](#).

Most international route areas for [Asia Pacific](#) saw PLF improvements in August, except [North America – Asia](#) and [North/South America – Southwest Pacific](#). The PLF on the [North America – Asia](#) corridor fell by 2.1 percentage points to 83.8%, marking the fourth consecutive month of YoY declines on that route. The PLF on the [North/South America – Southwest Pacific](#) corridor dropped by 1.5 percentage points YoY to 76.4%, the lowest among major route areas serving [Asia Pacific](#).

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

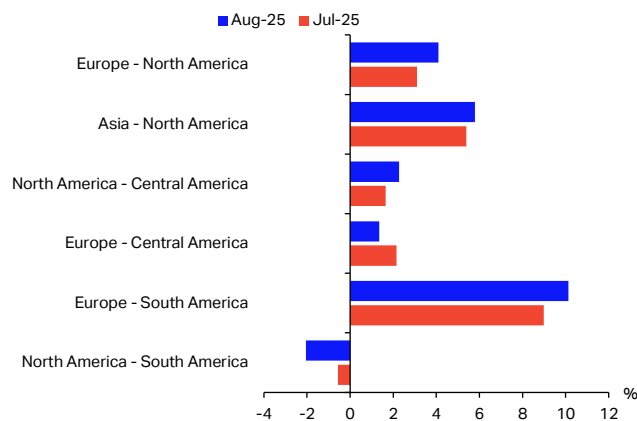
In August, most major international route areas serving the **Americas** recorded modest or negative growth below the industry average for international traffic, except for the **Europe – South America** corridor which rose by 10.1% YoY (Chart 7). Traffic to **South America** from **Spain** and **Italy**, the two largest **European** source markets, surged 12.0% and 24.1% YoY, respectively.

The **trans-Atlantic** corridor is the largest route area for the **Americas** and grew by 4.1% YoY in August, up from 3.1% in July. The **North America – Central America** and **Europe – Central America** corridors continued to post modest gains in August, rising just 2.3% and 1.3% YoY, respectively.

International traffic between **North America** and **South America** contracted for a second month, with RPK falling 2.1% YoY in August. This was also the only major international route area to record a YoY capacity decline, slipping 0.2%.

The PLF across most route areas serving the **Americas** declined YoY in August, with the exception of **Europe – Central America** and **Europe – South America** routes.

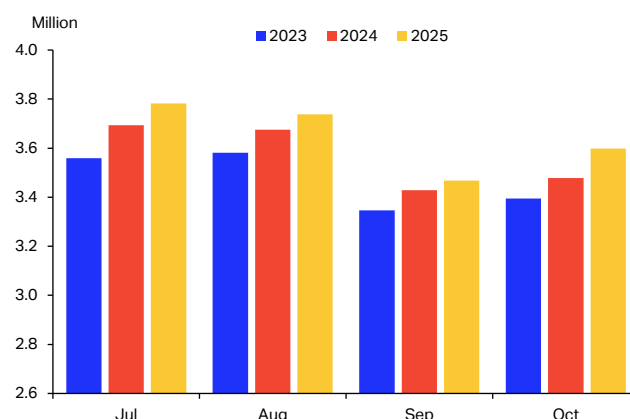
Chart 7: RPK growth across major Americas international route areas, YoY, %



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

The number of scheduled flights worldwide increased by 1.7% YoY in August, followed by a 1.2% rise projected for September (Chart 8). Looking ahead to October, flight volumes are expected to grow by 3.4% YoY, supporting continued momentum in global air traffic over the coming months.

Chart 8: Industry-wide scheduled flights



Sources: IATA Sustainability and Economics, OAG schedules

Air passenger market in detail - August 2025

	World	August 2025 (year-on-year, %)				August 2025 (year-to-date, %)			
	share, %'	RPK	ASK	PLF (%-pt)	PLF (level)	RPK	ASK	PLF (%-pt)	PLF (level)
TOTAL MARKET	100.0	4.6	4.5	0.1	86.0	5.0	4.9	0.1	83.4
Africa	2.2	8.9	6.6	1.7	80.2	7.6	6.3	1.0	75.5
Asia Pacific	33.5	6.1	5.5	0.5	85.9	8.0	6.5	1.1	84.2
Europe	26.7	4.2	4.2	-0.1	87.9	4.4	4.4	0.0	84.1
Latin America and Caribbean	5.3	7.5	5.9	1.3	85.0	7.6	8.4	-0.6	83.0
Middle East	9.4	8.4	7.0	1.1	83.8	5.8	4.9	0.7	81.4
North America	22.9	0.5	1.6	-1.0	85.6	0.2	2.0	-1.5	83.3
International	61.8	6.6	6.5	0.1	85.8	6.9	6.6	0.3	83.3
Africa	1.8	7.1	5.3	1.3	79.7	7.0	5.5	1.1	75.1
Asia Pacific	16.8	9.8	9.5	0.2	85.1	12.0	11.1	0.7	84.6
Europe	23.5	5.3	5.3	0.0	87.2	5.4	5.3	0.1	83.4
Latin America and Caribbean	2.8	9.0	9.3	-0.2	84.7	9.7	11.9	-1.7	83.5
Middle East	9.0	8.2	6.9	1.0	83.9	5.6	4.7	0.7	81.5
North America	7.9	1.8	2.6	-0.6	87.5	1.4	1.4	0.0	84.5
Domestic	38.2	1.5	1.3	0.1	86.3	1.9	2.1	-0.2	83.6
Dom. Australia	0.8	0.4	3.3	-2.4	83.4	1.7	0.0	1.3	80.4
Dom. Brazil	1.1	12.7	8.1	3.4	85.1	11.3	9.3	1.5	82.5
Dom. China P.R.	11.3	3.4	3.1	0.3	85.5	4.1	2.3	1.5	84.1
Dom. India	1.7	0.4	-0.2	0.5	83.2	7.0	8.8	-1.4	85.3
Dom. Japan	1.0	6.0	3.1	2.4	89.6	5.7	1.1	3.4	79.6
Dom. United States	14.4	-0.2	1.1	-1.1	84.2	-0.6	2.1	-2.3	82.4

Note 1: % of industry RPK in 2024

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.

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