

Passenger Traffic Returns to Contraction in August

- Industry-wide Revenue Passenger Kilometers (RPK) slipped back into contraction, declining by 0.8% year-on-year (YoY) in August, after only one month of marginal growth, at 0.3% in July.
- The industry Passenger Load Factor (PLF) dropped by 0.9 percentage points YoY but remained high at 85.1%.
- Traffic growth slowed across most regions compared to July, and declines deepened in the Middle East and North America.
- Domestic traffic remained slightly below its year-earlier level, with capacity growth continuing to outpace demand.
- International traffic remained below its August 2025 level, driven largely by ongoing weakness among Middle Eastern carriers.
- Scheduled seat capacity is expected to increase by 1.6% YoY in September and 2.0% YoY in October.

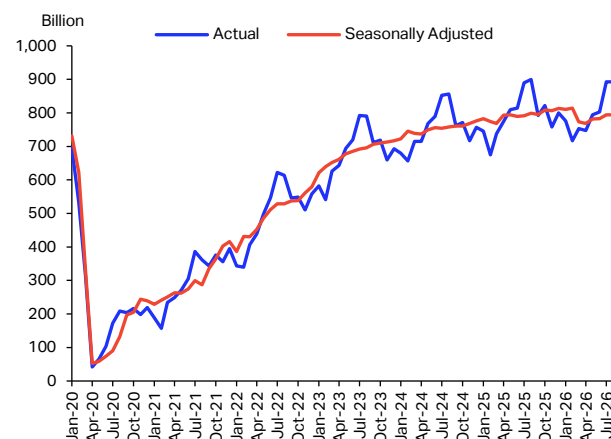
Passenger traffic contracts again after brief July growth

Global passenger traffic dropped by 0.8% YoY in August, after a single month of marginal growth in July. Declines among Middle Eastern and North American airlines worsened in August compared with July, while carriers in all other regions, except Asia Pacific, recorded slower growth. Excluding Middle Eastern carriers, global passenger traffic grew by 0.6% YoY.

Industry RPK reached 893 billion in August (Chart 1). On a seasonally adjusted basis, passenger traffic fell by 0.7% YoY and remained flat compared with July.

Capacity, measured in Available Seat Kilometers (ASK), rose by 0.3% YoY in August, broadly in line with July. The PLF decreased by 0.9 percentage points YoY to 85.1%, as demand fell while capacity increased.

Chart 1: Global RPK, billion



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

Air passenger market in detail - August 2026

	World share, % ¹	August 2026 (year-on-year, %)				August 2026 (year-to-date, %)			
		RPK	ASK	PLF (%-pt)	PLF (level)	RPK	ASK	PLF (%-pt)	PLF (level)
TOTAL MARKET	100.0	-0.8	0.3	-0.9	85.1	0.4	0.1	0.3	83.6
International	62.8	-0.9	0.0	-0.8	85.0	0.2	-0.4	0.5	83.7
Domestic	37.2	-0.5	0.7	-1.1	85.3	0.8	1.0	-0.2	83.5

¹ % of industry RPK in 2025

Both international and domestic markets resumed their decline in August

Both international and domestic traffic dropped in August, following one month of growth in July when traffic increased by less than 1% YoY.

International traffic declined by 0.9% YoY in August. Excluding Middle Eastern carriers, global international traffic increased by 1.3% YoY. International capacity was unchanged from a year earlier, and the international PLF fell by 0.8 percentage points YoY to 85.0%.

Domestic traffic dropped by 0.5% YoY. Growth in the Chinese, Brazilian and Australian markets was insufficient to offset contractions in the US, Indian and Japanese markets. Domestic capacity expanded by 0.7% YoY, and the domestic PLF was down by 1.1 percentage points YoY to 85.3%.

Regional traffic growth weakened in August, while contractions intensified in the Middle East and North America. PLFs mostly remained below 2025 levels

Traffic growth weakened across most regions in August. In the Middle East and North America, traffic even continued to drop, and contractions deepened compared with July (**Chart 2**). The August PLF remained below 2025 levels for airlines in most regions, with Asia Pacific carriers the only airlines to record a slight increase (**Chart 3**).

Traffic carried by **Middle Eastern** carriers fell by 14.6% YoY. The contraction deepened from 9.7% YoY in July. Capacity was down by 9.3% YoY, a slower pace than the fall in demand, resulting in a 4.9 percentage point decline in the PLF to 78.9%.

North American carriers reported a 2.2% YoY drop in traffic, marking a fourth consecutive month of contraction and a faster decline than in July. This reflected softer international traffic alongside continued weakness in the US domestic market. Capacity fell by 1.0% YoY, a slower pace than demand, pushing the PLF down to 84.6%.

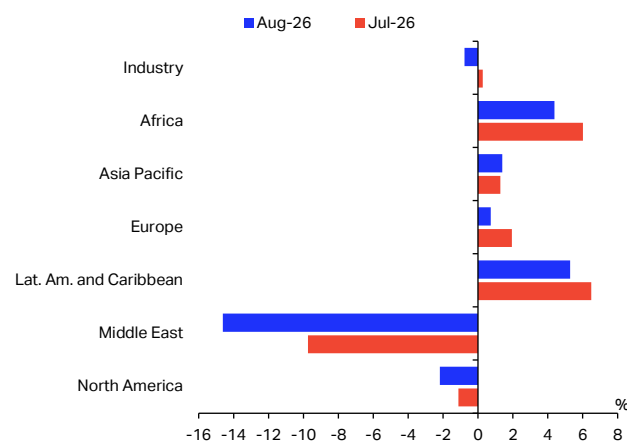
Airlines in **Latin America and the Caribbean** recorded the strongest traffic growth among all regions in August, with demand rising by 5.3% YoY. The performance was driven by international traffic, which increased by 6.7% YoY, as well as strong growth in key domestic markets such as Brazil. Capacity grew by 6.3% YoY, outpacing demand, and the PLF declined by 0.8 percentage points to 84.0%.

African carriers showed demand growth of 4.4% YoY. Capacity expanded by 7.2% YoY, outpacing demand and leading to a 2.1 percentage point decline in the PLF to 77.5%.

Carriers from **Asia Pacific** recorded a 1.4% YoY rise in passenger traffic in August. Growth was supported by stronger demand in key domestic markets, including China, the region's largest, and Australia. Capacity expanded by 1.3% YoY, lifting the PLF by 0.1 percentage points to 85.9%, a record high for August.

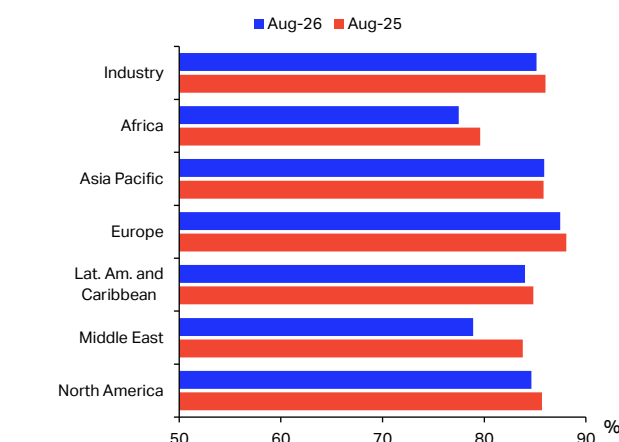
European airlines posted a 0.7% YoY increase in passenger traffic, supported by a 2.1% rise in international demand. Capacity grew slightly faster, by 1.4% YoY, and the PLF dropped by 0.6 percentage points to 87.5%. This was the highest PLF among regions in August.

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/ASK, %



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

Domestic traffic fell despite gains in three major markets

Higher demand in China, Brazil and Australia contrasted with declines in Japan, the US and India. Despite growth across several major markets, overall domestic traffic remained slightly below its level a year earlier. Industry-wide domestic capacity continued to expand despite weaker traffic, resulting in a lower PLF than a year ago (**Chart 4**).

China recorded the strongest growth among the major domestic markets, with RPK rising by 5.8% YoY. This was broadly in line with July, supported by summer travel demand, and came after declines in May and June. Capacity increased by 6.5% YoY, outpacing demand growth, while the load factor declined by 0.5 percentage points to 85.7%, remaining slightly above the domestic industry average.

Domestic traffic in **Brazil** increased by 4.3% YoY, slower than the 6.0% growth recorded in July. Capacity expanded by 8.0% YoY, the fastest pace among the six major domestic markets and almost double the traffic increase. The PLF fell by 2.9 percentage points to 82.1%.

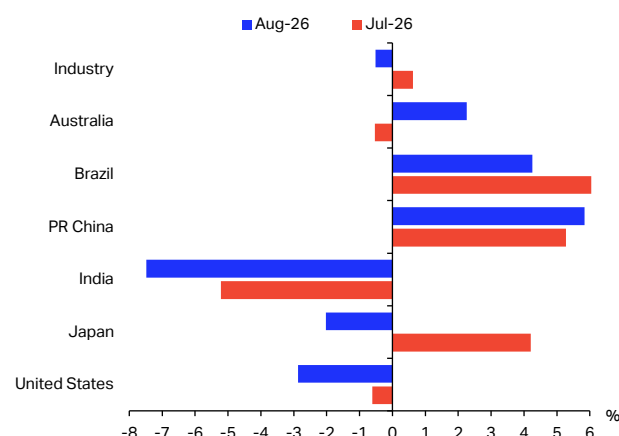
Australia reported a 2.3% YoY increase in domestic RPK after a slight drop in July. Capacity rose by only 0.4%, contributing to a 1.6 percentage point increase in the PLF to 85.8%. This was the largest PLF gain among the major domestic markets in August.

Japan returned to contraction after a 4.2% YoY increase in July, with domestic traffic declining by 2.0%. Capacity fell by 2.1% and the PLF was broadly stable at 90.0%, up 0.1 percentage points from a year earlier. It remained the highest among the six major domestic markets.

The **US** domestic market recorded a steeper decline than in July, with RPK down 2.9% YoY compared with a 0.6% fall the previous month. Capacity decreased by 1.1%, less than the drop in traffic, and the load factor fell by 1.5 percentage points to 83.0%, below the domestic industry average.

India recorded the largest traffic decline among the major domestic markets. Domestic RPK fell by 7.5% YoY, following a 5.2% decrease in July. Capacity contracted by 1.2%, substantially less than the fall in demand, resulting in a 5.4 percentage point reduction in the PLF to 78.7%. This was both the lowest PLF and the largest drop in the load factor among the six markets.

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



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

International traffic declined, led by Middle Eastern carriers

International passenger traffic remained below its year-earlier level in August. Airlines in Latin America and the Caribbean, Africa and Europe reported traffic growth, while Asia Pacific, North American and Middle Eastern carriers recorded declines. International capacity was broadly unchanged at the industry level, but weaker demand resulted in a lower load factor. Only Asia Pacific and Latin American and Caribbean carriers reported increases in the PLF (**Chart 5**).

Latin American and Caribbean carriers reported one of the strongest increases in international traffic, with traffic up 6.7% YoY. Capacity increased by 6.4%, slightly below traffic growth, and the load factor edged up by 0.2 percentage points to 84.8%.

African carriers also recorded a 6.7% YoY increase in international traffic, although this was from a lower base as the international traffic carried by African airlines accounted for 1.9% of industry RPK in 2025. Capacity expanded by 8.3%, outpacing demand growth, and the PLF fell by 1.2 percentage points to 78.4%, the lowest among airline regions.

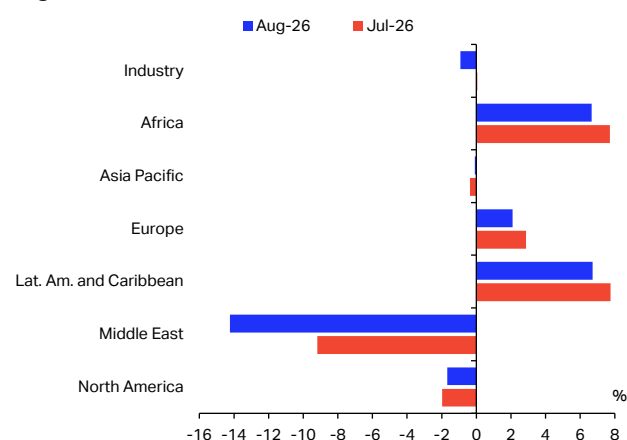
For **European** carriers, international RPK increased by 2.1% YoY, down from 2.9% growth in July. Capacity rose by 2.8%, slightly faster than demand, resulting in a 0.6 percentage point drop in the load factor to 86.8%, one of the highest among airline regions.

International traffic carried by **Asia Pacific** airlines was broadly unchanged from a year earlier, with RPK declining by 0.1% YoY. Capacity fell by 0.9%, a larger reduction than traffic, lifting the PLF by 0.7 percentage points to 85.6%, the largest increase among airline regions in August.

North American carriers reported a smaller decline than in July, with international RPK down by 1.7% YoY. Capacity fell by 1.1%, less than the decline in traffic, and the PLF decreased by 0.5 percentage points to 86.8%. This matched the European figure and remained above the international industry average.

Middle Eastern carriers recorded the largest drop in international traffic, with RPK down 14.2% YoY, compared with a 9.2% decline in July. Capacity was down by 9.0%, less than the fall in demand, and the load factor decreased by 4.8 percentage points to 79.1%. This was the largest reduction in PLF among all airline regions.

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



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

Most international routes serving Asia Pacific continued to record traffic growth in August

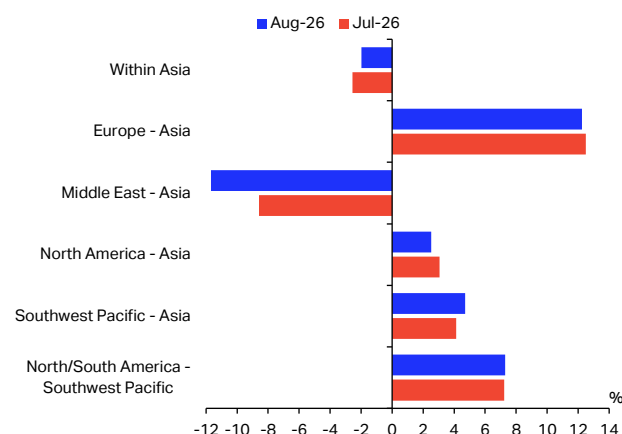
Performance across the major route areas was broadly similar to July. Traffic grew in all corridors except Within Asia and Middle East–Asia, with the latter recording a deeper contraction (**Chart 6**).

Traffic on routes **within Asia** decreased by 2.0% YoY in August. Capacity on these routes fell by 2.9% YoY, marking the fourth consecutive month of capacity contraction. As capacity dropped more sharply than traffic, the PLF increased by 0.8 percentage points to 83.9%.

The contraction in traffic on the **Middle East–Asia** corridor worsened from 8.6% YoY in July to 11.7% in August. Capacity on this corridor decreased by a smaller 8.4% YoY, resulting in a 2.9 percentage point drop in the PLF to 78.0%, the lowest among Asia Pacific's major international route areas.

The **Europe–Asia** corridor continued to perform strongly, with traffic increasing by 12.2% YoY. The **North/South America–Southwest Pacific**, **Southwest Pacific–Asia** and **North America–Asia** corridors also continued to expand, with traffic growing by 7.3%, 4.7% and 2.5% YoY, respectively. Growth rates across these corridors were broadly similar to those recorded in July.

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

Traffic declines persist across key Americas international corridors

Similar to July, traffic fell on three of the six largest corridors serving the region, with the contraction on the Middle East–North America corridor deepening (**Chart 7**).

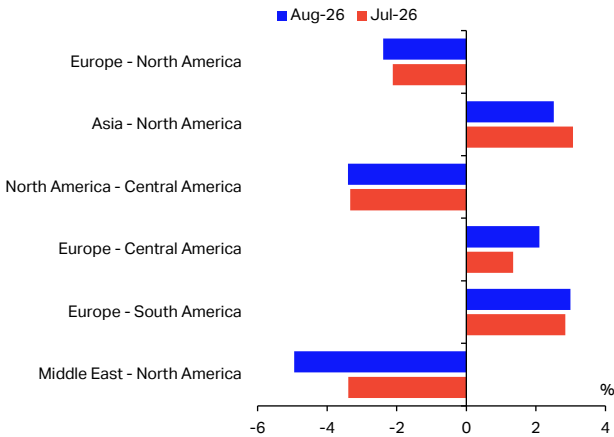
The **trans-Atlantic** corridor recorded a 2.4% YoY decline in traffic in August, marking a second consecutive monthly contraction after marginal growth in May and June. Traffic from several European source markets, including the United Kingdom and France, declined.

Traffic between **North America and Central America** contracted by 3.4% YoY, broadly unchanged from July. However, with capacity down by 5.8%, the PLF on this corridor increased by 2.2 percentage points to 87.1%.

The drop in traffic on the **Middle East–North America** corridor deepened in August, with traffic falling by 5.0% YoY. Capacity decreased by 2.4% YoY, less than the decrease in traffic, resulting in a 2.3 percentage point fall in the PLF to 84.5%. This was the steepest decline among the major corridors serving the Americas.

By contrast, traffic on the [Asia–North America](#), [Europe–Central America](#) and [Europe–South America](#) corridors continued to grow in August, increasing by 2.5%, 2.1% and 3.0% YoY, respectively. The Europe–Central America corridor recorded the highest PLF at 92.1%, remaining the only major international route area globally with a load factor above 90%.

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



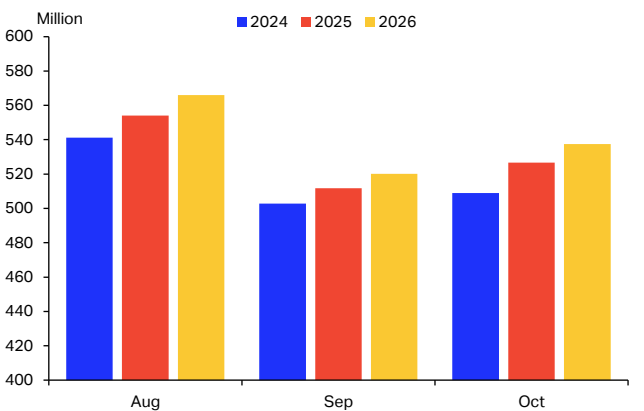
Source: IATA Sustainability and Economics, IATA Information and Data - Monthly Statistics. Route areas are ordered by size, from largest to smallest ¹

[Global seat capacity growth expected to continue in September and October](#)

Global scheduled seat capacity is expected to continue growing in September and October (**Chart 8**). Based on schedules available at the time of publication, global seat capacity is projected to increase by 1.6% YoY in September and 2.0% YoY in October.

In the Middle East, the contraction in seat capacity is expected to remain in the single digits in both September and October, at 6.4% and 5.7% YoY, respectively, following double-digit declines recorded at the height of the conflict between March and June.

Chart 8: Industry-wide scheduled seats, million



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 Guiana, Peru, Suriname or Venezuela; Europe – South America routes include flights between Europe and Argentina, Brazil, Chile, Paraguay or Uruguay.

Air passenger market in detail - August 2026

	World	August 2026 (year-on-year, %)				August 2026 (year-to-date, %)			
	share, % ¹	RPK	ASK	PLF (%-pt)	PLF (level)	RPK	ASK	PLF (%-pt)	PLF (level)
TOTAL MARKET	100.0	-0.8	0.3	-0.9	85.1	0.4	0.1	0.3	83.6
Africa	2.2	4.4	7.2	-2.1	77.5	7.1	6.8	0.2	75.7
Asia Pacific	34.4	1.4	1.3	0.1	85.9	2.9	1.9	0.8	84.9
Europe	26.7	0.7	1.4	-0.6	87.5	3.0	2.5	0.4	84.5
Latin America and Caribbean	5.4	5.3	6.3	-0.8	84.0	6.2	5.5	0.6	83.7
Middle East	9.5	-14.6	-9.3	-4.9	78.9	-19.9	-16.3	-3.5	77.9
North America	21.8	-2.2	-1.0	-1.0	84.6	0.2	-0.2	0.4	83.6
International	62.8	-0.9	0.0	-0.8	85.0	0.2	-0.4	0.5	83.7
Africa	1.9	6.7	8.3	-1.2	78.4	8.6	7.0	1.1	76.2
Asia Pacific	17.7	-0.1	-0.9	0.7	85.6	3.6	1.3	1.9	86.3
Europe	23.6	2.1	2.8	-0.6	86.8	3.7	3.1	0.5	83.8
Latin America and Caribbean	2.9	6.7	6.4	0.2	84.8	9.2	7.8	1.0	84.7
Middle East	9.1	-14.2	-9.0	-4.8	79.1	-20.3	-16.7	-3.5	78.0
North America	7.6	-1.7	-1.1	-0.5	86.8	0.8	-0.1	0.8	85.2
Domestic	37.2	-0.5	0.7	-1.1	85.3	0.8	1.0	-0.2	83.5
Australia	0.8	2.3	0.4	1.6	85.8	1.0	2.4	-1.0	79.5
Brazil	1.2	4.3	8.0	-2.9	82.1	6.1	6.8	-0.5	81.9
China P.R.	11.3	5.8	6.5	-0.5	85.7	3.1	3.3	-0.2	84.3
India	1.7	-7.5	-1.2	-5.4	78.7	0.1	1.2	-0.9	84.4
Japan	1.0	-2.0	-2.1	0.1	90.0	1.8	-1.0	2.3	82.0
United States	13.6	-2.9	-1.1	-1.5	83.0	-0.3	-0.4	0.0	82.5

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

IATA Sustainability & Economics
economics@iata.org
 30 September 2026

Get the data

Access data related to this briefing through IATA's Monthly Statistics publication:
www.iata.org/monthly-traffic-statistics

IATA Economics Consulting

To find out more about our tailored economics consulting solutions, visit:
www.iata.org/consulting

Terms and Conditions for the use of this IATA Economics Report and its contents can be found here: www.iata.org/economics-terms

By using this IATA Economics Report and its contents in any manner, you agree that the IATA Economics Report Terms and Conditions apply to you and agree to abide by them. If you do not accept these Terms and Conditions, do not use this report.