



Air Passenger Market Analysis

June 2025

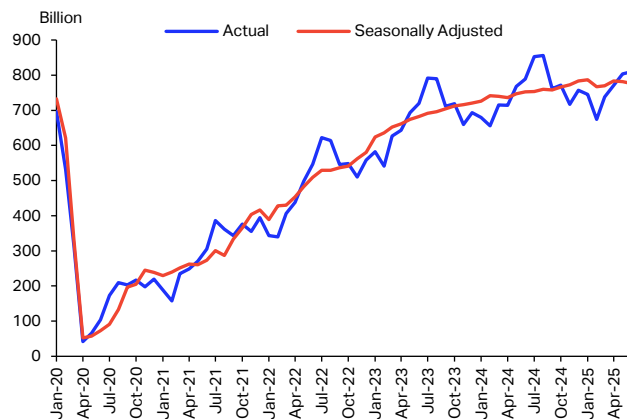
June showed the slowest growth in the whole 1H 2025

- Industry-wide Revenue Passenger Kilometers (RPK) increased 2.6% year-on-year (YoY) in June, marking the slowest monthly growth so far in 2025.
- The Passenger Load Factor (PLF) reached 84.5%, signaling the onset of the peak summer season.
- All regions except the **Middle East** showed growth. The military conflict continued to disrupt airline operations in the region.
- Mixed performance from major domestic markets resulted in a slower overall industry increase. The **US** saw traffic return to positive territory, although only marginally, after four consecutive months of contraction.
- International RPK of carriers from **North America**, **Middle East** and **Africa** contracted in June. **Latin America and the Caribbean** was the only region where growth was faster compared to May.
- The number of passenger flights scheduled worldwide is expected to expand by 2.4% YoY in July and 1.8% YoY in August.

Slower growth momentum continued in June

Global passenger traffic grew 2.6% YoY in June. This was the lowest YoY increase in the first six months of 2025 (Chart 1). Actual RPK reached 810 billion. Seasonally adjusted RPK dropped slightly by 0.7% month-on-month (MoM) in June.

Chart 1: Global RPK, billion



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

June saw slower YoY growth in both industry-wide international and domestic RPK, extending the trend observed in May. Domestic RPK expanded only 1.6% YoY, along with a 2.1% increase in Available Seat Kilometers (ASK). The PLF in the domestic market dropped 0.4 percentage points YoY to 84.7% on average.

The international market performed better, where RPK rose by 3.2% YoY in June. The higher expansion in capacity at 4.2% YoY also meant that international PLF declined by 0.8 percentage points YoY to 84.4%. The larger increase in international RPK compared to domestic RPK means the international segment accounted for most of the net growth in global RPK in June.

Air passenger market in detail - June 2025

| | World share ¹ | June 2025 (% year-on-year) | | | | June 2025 (% year-to-date) | | | |
|---------------------|--------------------------|----------------------------|-------------|--------------|--------------|----------------------------|-------------|-------------|--------------|
| | | RPK | ASK | PLF (%-pt) | PLF (level) | RPK | ASK | PLF (%-pt) | PLF (level) |
| TOTAL MARKET | 100.0% | 2.6% | 3.4% | -0.6% | 84.5% | 5.1% | 4.8% | 0.2% | 82.5% |
| International | 61.8% | 3.2% | 4.2% | -0.8% | 84.4% | 7.0% | 6.5% | 0.4% | 82.3% |
| Domestic | 38.2% | 1.6% | 2.1% | -0.4% | 84.7% | 2.0% | 2.2% | -0.2% | 82.9% |

¹% of industry RPKs in 2024

Latin America and the Caribbean led the growth, while the Middle East contracted

All regions except for the [Middle East](#) showed growth in June, though the YoY increases for [Africa](#) and [Europe](#) were the slowest for their respective regions in the first six months of 2025 (Chart 2).

Airlines from the [Middle East](#) saw RPK drop by 0.2% YoY after two months of strong traffic expansion in April and May. This contraction came chiefly from the 0.4% YoY decline in international traffic.

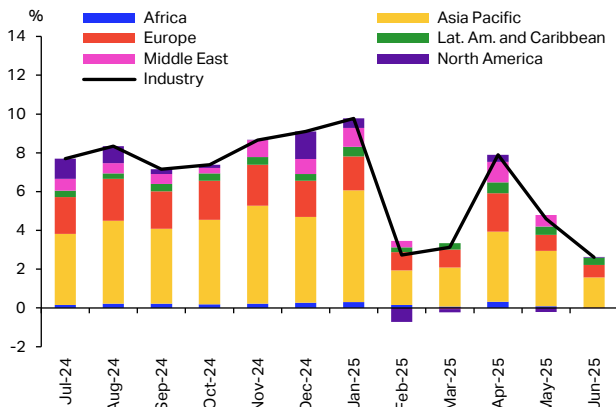
The RPK of [North American](#) airlines expanded marginally by 0.1% YoY in June after a 0.8% YoY contraction in May. June was one of only three months in the first half of 2025 when the RPK of [North American](#) airlines grew.

The growth in RPK of airlines from all other regions slowed though remained positive. RPK of airlines from the [Asia Pacific](#) region rose by 5.0% YoY, the second highest among regions in June. This growth accounted for 60% of the total global net increase in RPK.

The RPK of [European](#) airlines expanded 2.2% YoY. This represented 24% of the net growth in global passenger traffic in June, making [Europe](#) the second largest contributor.

Carriers from [Latin America and the Caribbean](#) showed the highest increase among regions at 7.9% YoY, driven largely by the strong performance in the international sector. RPK of [African](#) airlines expanded 0.8% YoY, making June the second consecutive month of slower growth.

Chart 2: Regional contribution to industry-wide RPK growth, YoY, %



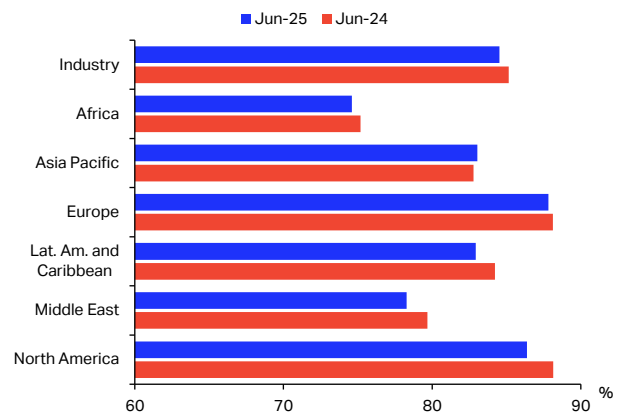
Source: IATA Sustainability and Economics, IATA Information and Data - Monthly Statistics

Industry-wide total PLF was strong at 84.5% as June marks the beginning of the peak summer travel season (Chart 3). Total capacity increased 3.4% YoY. This was slightly higher than the 2.6% YoY growth in demand and resulted in a 0.6 percentage point YoY decline in global PLF.

The PLF of airlines from all regions declined YoY in June, except for [Asia Pacific](#). ASK of carriers from that region expanded 4.7% YoY, lower than RPK growth and resulting in a slight 0.3 percentage point YoY increase in PLF to 83.0%.

[North American](#) carriers saw the largest PLF decline by 1.7 percentage points YoY to 86.4% in June. Capacity increased 2.1% YoY while RPK only grew 0.1% YoY. This was the fifth consecutive month when the PLF of airlines from the region has dropped YoY.

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



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

Mixed performance in major domestic markets

Global domestic traffic rose by 1.6% YoY in June (Chart 4). This was the second month of slower growth after the moderate 2.1% YoY increase in May.

The [US](#) domestic market, the world's largest in RPK terms, expanded 0.1% YoY in June. This comes after four consecutive months of contraction and drove the return to growth in total [North American](#) RPK. [US](#) domestic capacity increased 1.8% YoY and resulted in a 1.5 percentage point drop in PLF YoY to 86.0%. While the [US](#) domestic PLF has declined YoY every month in the first half of 2025, it was still above the industry domestic PLF and highest among major domestic markets in June.

The 5.4% YoY growth in the [Indian](#) domestic market was a slight improvement from May, though still low compared to the double-digit increases in the first four months of the year. The domestic PLF declined 2.9 percentage points YoY to 84.3%, as ASK rose by 9.0% YoY.

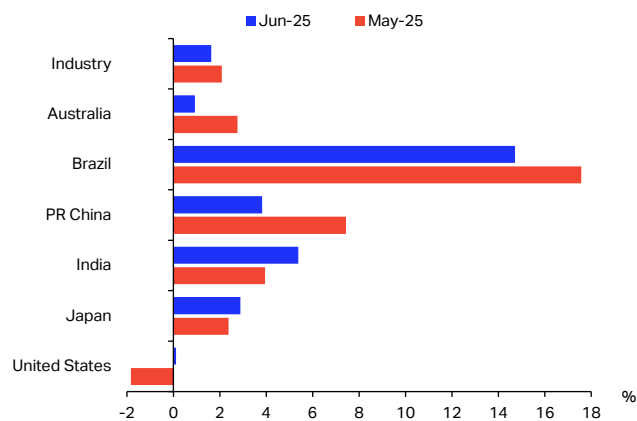
The growth in the [Japan](#) domestic market at 2.9% YoY in June was also higher than May. Domestic ASK declined 0.3% YoY as airlines diverted capacity to the international segment in response to strong inbound travel demand. As a result, domestic PLF increased 2.3 percentage points YoY to 75.3%.

Domestic traffic in [China](#) increased 3.8% YoY in June. This growth was around half of that in May. Capacity increased 3.0% YoY and PLF improved 0.6 percentage points YoY to 83.1%.

Domestic RPK in [Brazil](#) expanded 14.7% YoY. It was by far the best performer among all major domestic markets and the only one with double-digit growth. Capacity kept up with demand and increased 17.0% YoY, supporting the surge in tourism and travel, especially to Northern [Brazil](#).

[Australian](#) domestic RPK expanded 0.9% YoY in June. This was the second consecutive month that traffic growth has slowed. ASK increased 1.5% YoY and PLF dropped 0.5 percentage points YoY to 81.1%.

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



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

Latin America and the Caribbean posted the highest international traffic growth

Industry-wide international traffic expansion slowed to 3.2% YoY in June (Chart 5). International RPK of airlines from [Latin America and the Caribbean](#) increased 9.3% YoY, the highest among regions. Notably, this was the first month since May 2022 when [Asia Pacific](#) did not achieve the highest growth rate in international RPK. [Latin America and the Caribbean](#) was also the only region where the growth pace increased compared to May. The international ASK of airlines from the region rose by 11.8% YoY, supporting the strong demand for travel.

[Asia Pacific](#) international RPK expanded 7.2% YoY in June after two months of double-digit growth. Capacity rose slightly faster by 7.5% YoY, pushing PLF down 0.2 percentage points YoY to 82.9%. [European](#) carriers saw their international RPK increase 2.8% YoY

and ASK expand 3.3% YoY in June. They had the highest international PLF among regions, at 87.4%.

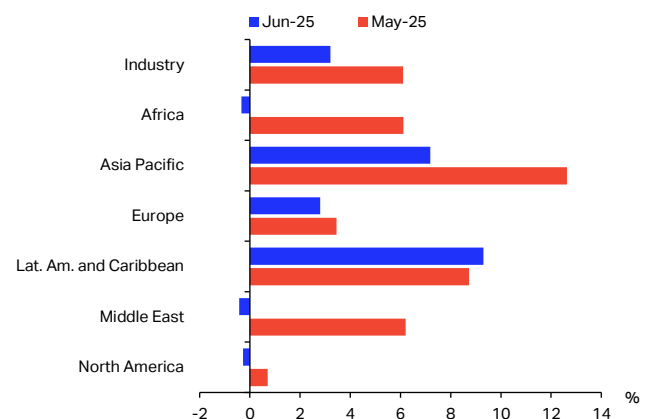
The international RPK of [African](#), [Middle Eastern](#) and [North American](#) carriers contracted in June, by 0.3%, 0.4% and 0.3% YoY, respectively.

The drop in growth rate from May was the steepest for [Middle Eastern](#) airlines, where YoY international RPK growth declined 6.6 percentage points. The military conflict and resulting closure of several Gulf States' airspace had significantly impacted international traffic. Traffic on routes from the region to [North America](#) and [Europe](#) decreased 7.0% and 4.4% YoY, respectively. The PLF of [Middle Eastern](#) carriers declined 1.2 percentage points YoY to 78.7% in June.

June was the first month post-pandemic when the international RPK of [African](#) airlines contracted. Stiff competition from [European](#) and [Middle Eastern](#) carriers had affected the growth of [African](#) airlines in the international sector, with PLF declining 0.5 percentage points YoY to 74.6%.

The international PLF of [North American](#) carriers dropped by 2.2 percentage points YoY to 86.9% in June, though this was still higher than the industry PLF of 84.4%.

Chart 5: International RPK growth by market, YoY, %



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

All major international route areas serving the [Asia Pacific](#) region saw growth rates easing in June, compared to May (Chart 6). Traffic within [Asia](#) and to [Europe](#), the two largest international corridors for [Asia Pacific](#), fell to single-digit gains of 9.6% and 9.7% YoY, respectively. International travel from [China](#) to the rest of [Asia](#) expanded 17.8% YoY and drove the increase in international traffic within [Asia](#). June was the first month since April 2021 when traffic growth between [Europe](#) and [Asia](#) fell to the single digits.

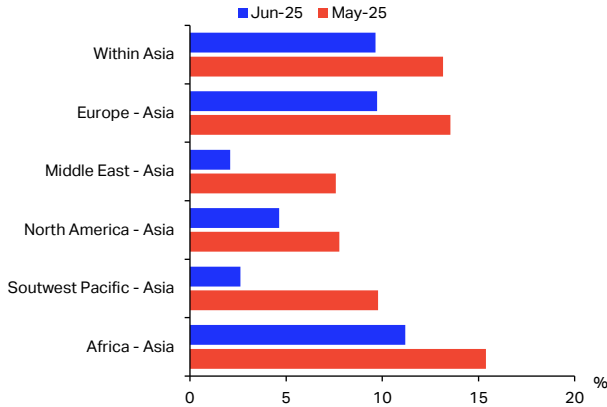
Traffic gains between [Africa](#) and [Asia](#) were the highest at 11.2% YoY, albeit from a low base. This was the only route area that maintained double-digit growth from May. The [North America – Asia](#) corridor

increased 4.6% YoY. Among the top three origin markets from [Asia](#) to [North America](#), traffic from [India](#) declined 1.9% YoY due to a reduction in capacity following the air crash at Ahmedabad Airport, while traffic from [Japan](#) and [China](#) grew 17.2% and 15.8% YoY, respectively.

The traffic expansion between the [Southwest Pacific](#) and [Asia](#) slowed to 2.6% YoY, below the industry-wide international performance of 3.2% YoY. The lowest growth came from routes between the [Middle East](#) and [Asia](#) at 2.1% YoY, with demand being affected by the military conflict in the [Middle East](#).

Despite the slower international RPK growth from [Asia Pacific](#), all route areas showed an increase in PLF, except for the [North America – Asia](#) corridor, with ASK expanding at a slower rate than demand.

Chart 6: 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

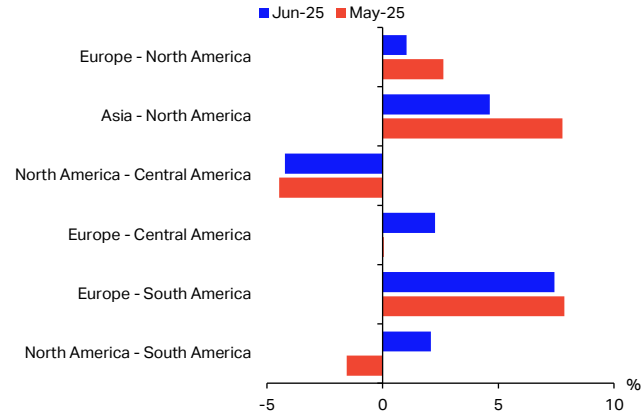
Traffic on key international routes for the [Americas](#) showed mixed performance in June (Chart 7). The [Europe – South America](#) corridor was the best performing route for the [Americas](#) at 7.4% YoY. This was the only route where PLF improved, by 0.5 percentage points YoY to 89.6%. Traffic between [North America](#) and [South America](#) returned to positive territory at 2.1% YoY after two consecutive months of decline.

RPK growth on the [trans-Atlantic](#) corridor, the most important route for the [Americas](#), slowed to 1.0% YoY from 2.6% YoY in May. The PLF also declined 1.8

percentage points YoY to 87.3%. The [Asia – North America](#) corridor expanded 4.6% YoY, with traffic from the [US](#) and [Canada](#) to [Asia](#) expanding 7.7% and 8.5% YoY, respectively. Traffic between [Europe](#) and [Central America](#) grew 2.3% YoY.

RPK on the [North America – Central America](#) corridor contracted the second month in a row and dropped 4.2% YoY in June. This was the only route area where traffic declined for the [Americas](#) and where PLF, at 82.1%, was below the industry-wide international PLF.

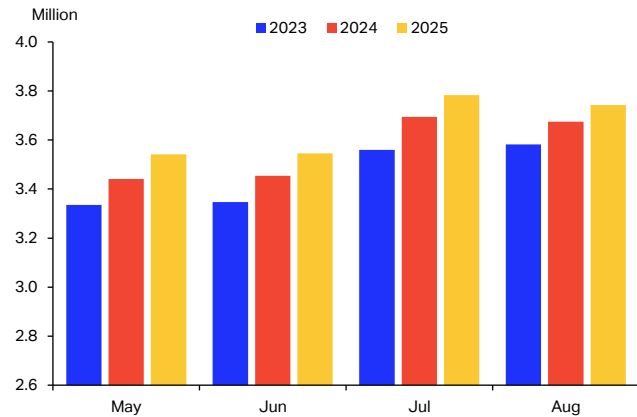
Chart 7: RPK growth in selected Americas international route areas, YoY, %



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

The number of flights scheduled worldwide expanded 2.6% YoY in June and 2.4% YoY for July (Chart 8). There are currently 1.8% more flights scheduled for August, compared to the previous year. August is the fifth consecutive month when growth in scheduled flights has slowed.

Chart 8: Industry-wide scheduled flights



Sources: IATA Sustainability and Economics, OAG schedules

Air passenger market in detail - June 2025

| | World share ¹ | June 2025 (% year-on-year) | | | | June 2025 (% year-to-date) | | | |
|----------------------|-----------------------------|----------------------------|-------------|--------------|--------------|----------------------------|-------------|--------------|--------------|
| | | RPK | ASK | PLF (%-pt) | PLF (level) | RPK | ASK | PLF (%-pt) | PLF (level) |
| TOTAL MARKET | 100.0% | 2.6% | 3.4% | -0.6% | 84.5% | 5.1% | 4.8% | 0.2% | 82.5% |
| Africa | 2.2% | 0.8% | 1.5% | -0.6% | 74.6% | 7.3% | 6.1% | 0.8% | 74.4% |
| Asia Pacific | 33.5% | 5.0% | 4.7% | 0.3% | 83.0% | 11.4% | 9.8% | 1.1% | 81.5% |
| Europe | 26.7% | 2.2% | 2.6% | -0.3% | 87.8% | 5.3% | 5.2% | 0.1% | 81.8% |
| Latin America | 5.3% | 7.9% | 9.6% | -1.3% | 82.9% | 5.1% | 4.8% | 0.2% | 82.5% |
| Middle East | 9.4% | -0.2% | 1.6% | -1.4% | 78.3% | 5.3% | 1.3% | 2.9% | 76.8% |
| North America | 22.9% | 0.1% | 2.1% | -1.7% | 86.4% | 7.6% | 9.0% | -1.0% | 82.2% |
| International | 61.8% | 3.2% | 4.2% | -0.8% | 84.4% | 7.0% | 6.5% | 0.4% | 82.3% |
| Africa | 1.8% | -0.3% | 0.3% | -0.5% | 74.6% | 6.9% | 5.5% | 1.0% | 74.0% |
| Asia Pacific | 16.8% | 7.2% | 7.5% | -0.2% | 82.9% | 12.8% | 11.5% | 1.0% | 84.7% |
| Europe | 23.5% | 2.8% | 3.3% | -0.4% | 87.4% | 5.3% | 5.2% | 0.1% | 81.8% |
| Latin America | 2.8% | 9.3% | 11.8% | -1.9% | 83.3% | 9.9% | 12.5% | -2.0% | 82.9% |
| Middle East | 9.0% | -0.4% | 1.1% | -1.2% | 78.7% | 4.9% | 3.9% | 0.7% | 80.5% |
| North America | 7.9% | -0.3% | 2.2% | -2.2% | 86.9% | 1.0% | 0.8% | 0.2% | 83.0% |
| Domestic | 38.2% | 1.6% | 2.1% | -0.4% | 84.7% | 2.0% | 2.2% | -0.2% | 82.9% |
| Dom. Australia | 0.8% | 0.9% | 1.5% | -0.5% | 81.1% | 1.6% | -1.5% | 2.5% | 79.5% |
| Dom. Brazil | 1.1% | 14.7% | 17.0% | -1.7% | 83.0% | 11.4% | 9.8% | 1.1% | 81.5% |
| Dom. China P.R. | 11.3% | 3.8% | 3.0% | 0.6% | 83.1% | 4.3% | 1.9% | 2.0% | 84.1% |
| Dom. India | 1.7% | 5.4% | 9.0% | -2.9% | 84.3% | 9.6% | 11.9% | -1.8% | 86.0% |
| Dom. Japan | 1.0% | 2.9% | -0.3% | 2.3% | 75.3% | 5.3% | 1.3% | 2.9% | 76.8% |
| Dom. US | 14.4% | 0.1% | 1.8% | -1.5% | 86.0% | -0.9% | 2.2% | -2.5% | 81.5% |

¹% of industry RPKs in 2024

Note: the six domestic passenger markets for which broken-down data are available account for approximately 30.3% of global total RPKs and 79.3% 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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