

Passenger Traffic Remained Weak in September

- Industry-wide Revenue Passenger Kilometers (RPK) declined by 0.5% year-on-year (YoY) in September, a slight improvement from the 0.8% decrease recorded in August.
- The industry Passenger Load Factor (PLF) decreased by 0.3 percentage points YoY to 83.2%.
- Traffic increased in four regions, led by airlines in Africa and Latin America and the Caribbean, while the contractions among Middle Eastern and North American carriers moderated.
- Domestic traffic fell by 2.2% YoY, with declines in India, the US and Japan outweighing growth in Australia, China and Brazil.
- International traffic returned to growth, rising by 0.4% YoY, despite a continued contraction among Middle Eastern carriers.
- Global scheduled seat capacity is expected to increase by 0.6% YoY in October and 1.5% in November.

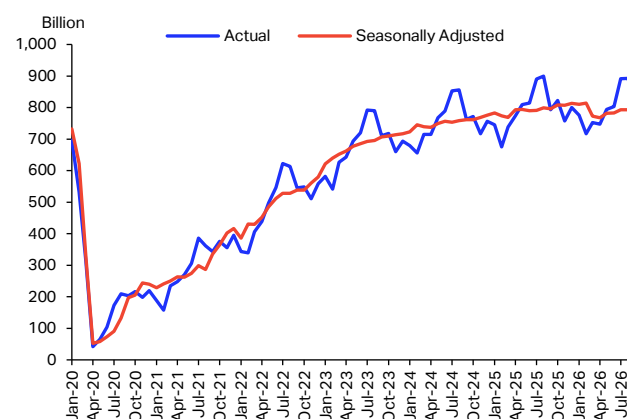
Passenger traffic continued to decline in September

Global passenger traffic declined by 0.5% YoY in September, a marginal improvement from August's 0.8% decrease. Traffic continued to grow in Africa, Latin America and the Caribbean, Asia Pacific and Europe, while the weakness in the Middle East and North America became less pronounced. Excluding Middle Eastern carriers, global passenger traffic rose by 0.3% YoY.

Industry RPK reached 788 billion in September (**Chart 1**). On a seasonally adjusted basis, passenger traffic declined by 0.2% YoY but increased marginally by 0.1% from August.

Capacity, measured in Available Seat Kilometers (ASK), fell by 0.2% YoY in September. The PLF decreased by 0.3 percentage points YoY to 83.2%, as demand contracted more than capacity.

Chart 1: Global RPK, billion



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

Air passenger market in detail - September 2026

	World	September 2026 (year-on-year, %)				September 2026 (year-to-date, %)			
	share, % ¹	RPK	ASK	PLF (%-pt)	PLF (level)	RPK	ASK	PLF (%-pt)	PLF (level)
TOTAL MARKET	100.0	-0.5	-0.2	-0.3	83.2	0.3	0.1	0.2	83.6
International	62.8	0.4	0.5	-0.1	83.6	0.3	-0.3	0.4	83.7
Domestic	37.2	-2.2	-1.3	-0.7	82.5	0.4	0.7	-0.3	83.3

¹ % of industry RPK in 2025

International traffic returned to growth, while domestic demand weakened further

The modest improvement at the industry level reflected a return to growth in international traffic, partly offset by a deeper domestic contraction.

International traffic rose by 0.4% YoY in September, up from a 0.9% decline in August. International capacity increased by 0.5% YoY, and the international PLF edged down by 0.1 percentage points to 83.6%.

Domestic traffic fell by 2.2% YoY, compared with a 0.6% decline in August. Domestic capacity declined by 1.3% YoY, and the domestic PLF fell by 0.7 percentage points to 82.5%.

Regional traffic growth remained mixed in September, while PLF outcomes improved in several regions

Traffic increased in four of the six regions in September. African carriers recorded the strongest growth, closely followed by airlines in Latin America and the Caribbean. Contractions in the Middle East and North America eased compared with August (**Chart 2**). The PLFs increased YoY in Asia Pacific and Europe, but remained below 2025 levels in the other regions (**Chart 3**).

Traffic carried by **Middle Eastern** carriers fell by 8.0% YoY, a smaller contraction than the 14.6% decline in August. Capacity decreased by 3.8% YoY, less than demand, resulting in a 3.6 percentage point fall in the PLF to 78.2%.

North American carriers reported a 1.6% YoY decline in traffic, moderating from a 2.6% fall in August, amid continued weakness in the US domestic market. Capacity decreased by 1.3% YoY, and the PLF edged down by 0.2 percentage points to 81.8%.

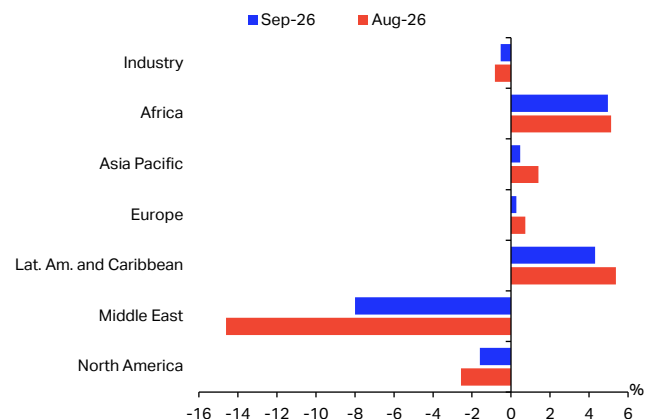
African carriers recorded the strongest traffic growth among regions in September, with demand rising by 5.0% YoY. Capacity expanded faster, by 7.7% YoY, leading to a 1.9 percentage point decline in the PLF to 73.5%, the lowest among regions.

Airlines in **Latin America and the Caribbean** posted traffic growth of 4.3% YoY, largely driven by strong performance on the international segment. Capacity increased by 5.1%, outpacing demand, and the PLF declined by 0.6 percentage points to 82.9%.

Asia Pacific carriers recorded a 0.5% YoY increase in passenger traffic. Both domestic and international markets remained in positive territory, although growth in each segment was below 1%. Capacity increased by 0.1%, resulting in a 0.3 percentage point rise in the PLF to 83.4%.

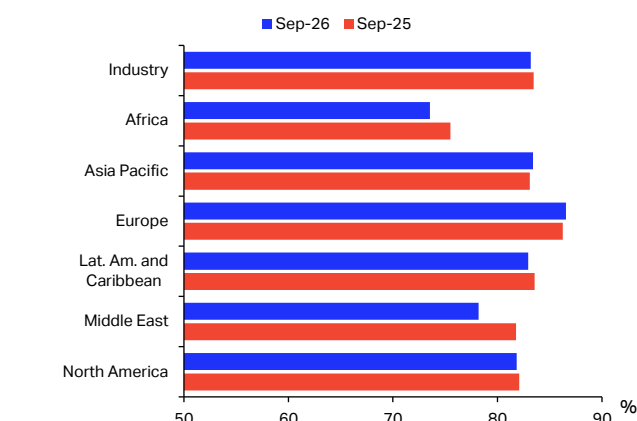
European airlines posted a 0.3% YoY increase in passenger traffic, supported by growth in international markets, which more than offset a decline in domestic traffic. Capacity declined by 0.1%, lifting the PLF by 0.3 percentage points to 86.6%, the highest among all regions in September.

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

Traffic contracted across half of the major domestic markets

The decline in domestic traffic deepened from 0.6% YoY in August to 2.2% in September. Gains in Australia, China and Brazil were insufficient to offset weaker demand in India, the US and Japan (**Chart 4**).

Australia recorded the strongest growth among the major domestic markets, with RPK rising by 4.5% YoY. Capacity fell by 0.9%, contributing to a 4.5 percentage point increase in the PLF to 86.5%, the largest gain among the six markets.

China's domestic RPK increased by 3.1% YoY in September, moderating from 5.8% growth in August. Capacity expanded at a similar pace, by 3.2%, and the

PLF was broadly stable at 84.1%, down 0.1 percentage points YoY.

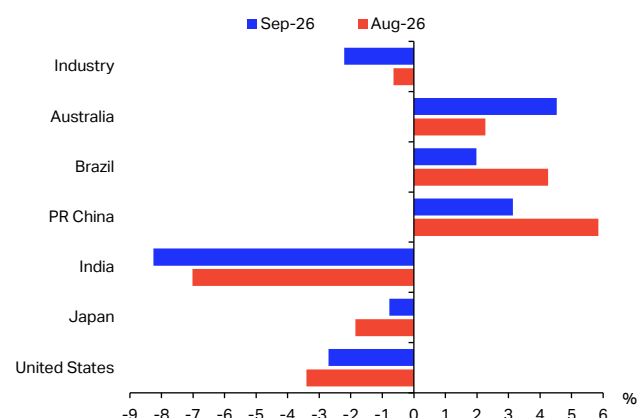
Domestic traffic in [Brazil](#) increased by 2.0% YoY in September, slowing from 4.3% in August. Capacity expanded by 7.1%, substantially faster than demand, and the PLF fell by 4.0 percentage points to 80.2%.

[Japan's](#) domestic traffic decreased by 0.8% YoY, a narrower fall than the 1.9% recorded in August. Weather-related flight disruptions affected part of the Silver Week travel period in September. Capacity fell by 0.2% YoY, and the PLF edged down by 0.5 percentage points to 85.5%.

The [US](#) domestic market contracted for a fifth consecutive month, with RPK down 2.7% YoY in September. The continued weakness coincided with subdued consumer confidence in the US, potentially weighing on discretionary travel demand. Capacity decreased by 1.0%, less than demand, and the PLF fell by 1.4 percentage points to 79.8%.

[India](#) recorded the weakest performance among the major domestic markets, with traffic falling by 8.3% YoY, its steepest decline so far in 2026. Demand remained under pressure against a backdrop of higher fuel prices and softer macroeconomic conditions. Capacity contracted by 7.9%, and the PLF edged down by 0.3 percentage points to 81.0%.

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



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

International traffic returned to growth in September

Following a 0.9% YoY decline in August, international passenger traffic increased by 0.4% in September (**Chart 5**). Traffic grew in all regions except the Middle East, while North American carriers were broadly unchanged YoY.

[Latin American and Caribbean](#) carriers recorded the strongest international traffic growth, with RPK rising by 8.2% YoY. Capacity increased by 7.6%, slightly

below demand, lifting the PLF by 0.5 percentage points to 83.9%.

[African](#) carriers posted an 8.0% YoY increase in international traffic. Capacity expanded faster, by 8.8%, and the PLF declined by 0.6 percentage points to 74.8%, the lowest among airline regions.

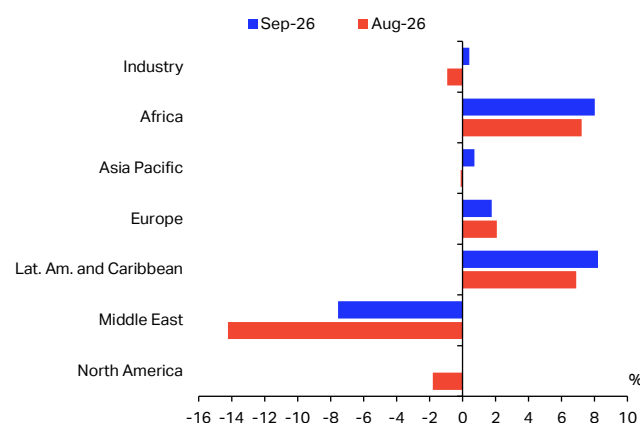
International traffic carried by [European](#) airlines increased by 1.8% YoY, with traffic within Europe, the world's largest international route corridor, growing by 2.2%. Capacity rose by 1.2%, lifting the PLF by 0.5 percentage points to 86.1%, the highest among all airline regions.

[Asia Pacific](#) airlines recorded a 0.7% YoY increase in international traffic, while capacity grew by 0.4%. The PLF rose by 0.3 percentage points to 83.1%.

International traffic carried by [North American](#) airlines was broadly unchanged from a year earlier. Capacity fell by 1.9%, lifting the PLF by 1.6 percentage points to 84.9%, the largest increase among airline regions.

[Middle Eastern](#) carriers recorded the only regional decline in international traffic, with RPK down 7.5% YoY, improving from a 14.2% contraction in August. Capacity fell by 3.3%, less than demand, and the PLF decreased by 3.6 percentage points to 78.3%.

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



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

Traffic growth continued across most major Asia Pacific international route areas in September

Traffic increased on four of the six largest international route areas serving Asia Pacific in September. Europe-Asia remained the strongest-growing corridor, whereas traffic within Asia and on Middle East-Asia routes continued to contract (**Chart 6**).

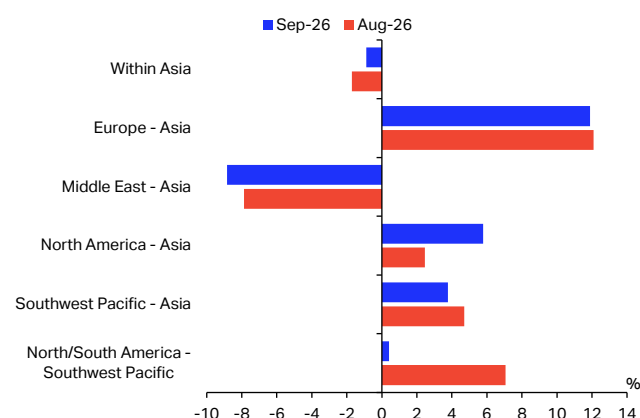
Traffic on routes [within Asia](#), the most important international route corridor for Asia Pacific, declined

by 0.9% YoY in September, improving from a 1.7% fall in August. Capacity decreased by 0.8%, broadly in line with demand, and the PLF edged down by 0.1 percentage points to 79.7%.

Traffic on the [Middle East–Asia](#) corridor fell by 8.8% YoY, a deeper contraction than the 7.9% decline recorded in August. Capacity decreased by 5.7%, less than demand, resulting in a 2.4 percentage point fall in the PLF to 70.8%, the lowest among the major Asia Pacific international route areas.

The [Europe–Asia](#) corridor continued to outperform other major international corridors, with traffic increasing by 11.9% YoY, one of the few double-digit growth rates recorded globally. Traffic on [North America–Asia](#) and [Southwest Pacific–Asia](#) routes also increased, by 5.8% and 3.8%, respectively, with the latter recording the highest PLF among the major Asia Pacific route corridors, at 86.0%. Growth on the [North/South America–Southwest Pacific](#) corridor, however, slowed sharply to 0.4%, from 7.1% in August.

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 performance improved on most major Americas international corridors

Traffic declined on three of the six largest international route areas serving the Americas in September, although the decreases were less pronounced than in August. Asia–North America recorded the strongest growth (**Chart 7**).

Traffic on the [trans-Atlantic](#) corridor declined by 0.6% YoY in September, improving from a 2.5% contraction

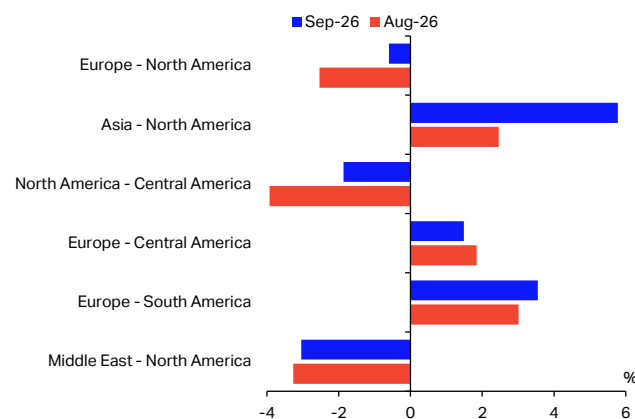
in August. Capacity fell by 2.2%, lifting the PLF by 1.4 percentage points to 86.9%.

Traffic between [North America and Central America](#) contracted by 1.9% YoY, compared with a 3.9% decline in August. Capacity fell more sharply, by 5.5%, contributing to a 3.1 percentage point increase in the PLF to 82.5%.

Traffic on the [Middle East–North America](#) corridor fell by 3.0% YoY, a slightly smaller decline than in August. Capacity decreased by 2.3%, and the PLF edged down by 0.6 percentage points to 77.4%, the lowest among the major corridors serving the Americas.

By contrast, traffic on the [Asia–North America](#) corridor increased by 5.8% YoY, accelerating from 2.5% in August. The [Europe–South America](#) and [Europe–Central America](#) corridors also expanded, with traffic rising by 3.5% and 1.5%, respectively. These two corridors recorded the highest PLFs globally, at 89.8% and 89.1%, respectively.

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 smallest¹

Global seat capacity growth expected to continue in October and November

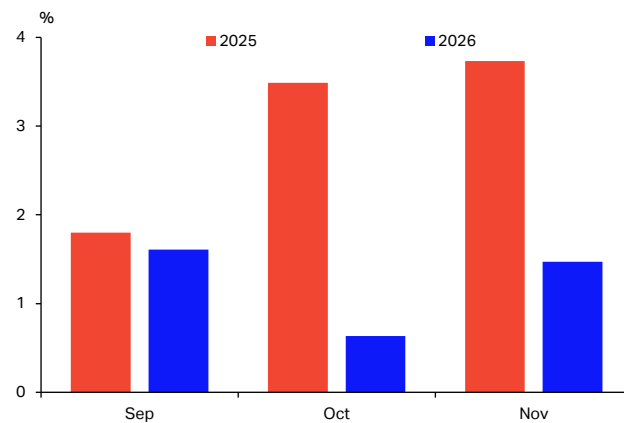
Global scheduled seat capacity is expected to remain above 2025 levels in October and November (**Chart 8**). Based on schedules available at the time of publication, capacity growth is projected to ease to 0.6% YoY in October before strengthening to 1.5% in November. While this points to continued growth at

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.

the global level, the outlook remains uneven across regions.

In the Middle East, scheduled seat capacity is expected to remain below 2025 levels, contracting by 9.9% YoY in October and 8.5% in November. The smaller decline expected in November nevertheless points to some moderation in the pace of contraction.

Chart 8: Growth in industry-wide scheduled seats, YoY, %



Source: IATA Sustainability and Economics, OAG schedules

Air passenger market in detail - September 2026

	World	September 2026 (year-on-year, %)				September 2026 (year-to-date, %)			
	share, % ¹	RPK	ASK	PLF (%-pt)	PLF (level)	RPK	ASK	PLF (%-pt)	PLF (level)
TOTAL MARKET	100.0	-0.5	-0.2	-0.3	83.2	0.3	0.1	0.2	83.6
Africa	2.2	5.0	7.7	-1.9	73.5	6.9	6.9	0.0	75.5
Asia Pacific	34.4	0.5	0.1	0.3	83.4	2.6	1.7	0.8	84.7
Europe	26.7	0.3	-0.1	0.3	86.6	2.7	2.2	0.4	84.7
Latin America and Caribbean	5.4	4.3	5.1	-0.6	82.9	6.0	5.4	0.5	83.6
Middle East	9.5	-8.0	-3.8	-3.6	78.2	-18.5	-14.9	-3.5	78.0
North America	21.8	-1.6	-1.3	-0.2	81.8	-0.1	-0.3	0.2	83.3
International	62.8	0.4	0.5	-0.1	83.6	0.3	-0.3	0.4	83.7
Africa	1.9	8.0	8.8	-0.6	74.8	8.6	7.2	1.0	76.1
Asia Pacific	17.7	0.7	0.4	0.3	83.1	3.3	1.2	1.7	85.9
Europe	23.6	1.8	1.2	0.5	86.1	3.5	2.9	0.5	84.1
Latin America and Caribbean	2.9	8.2	7.6	0.5	83.9	9.1	7.8	1.0	84.6
Middle East	9.1	-7.5	-3.3	-3.6	78.3	-18.8	-15.2	-3.5	78.0
North America	7.6	0.0	-1.9	1.6	84.9	0.7	-0.3	0.8	85.1
Domestic	37.2	-2.2	-1.3	-0.7	82.5	0.4	0.7	-0.3	83.3
Australia	0.8	4.5	-0.9	4.5	86.5	1.5	2.0	-0.4	80.3
Brazil	1.2	2.0	7.1	-4.0	80.2	5.6	6.8	-0.9	81.7
China P.R.	11.3	3.1	3.2	-0.1	84.1	3.1	3.3	-0.1	84.3
India	1.7	-8.3	-7.9	-0.3	81.0	-0.7	0.3	-0.8	84.1
Japan	1.0	-0.8	-0.2	-0.5	85.5	1.5	-0.9	2.0	82.4
United States	13.6	-2.7	-1.0	-1.4	79.8	-0.7	-0.3	-0.3	82.0

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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30 October 2026

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