

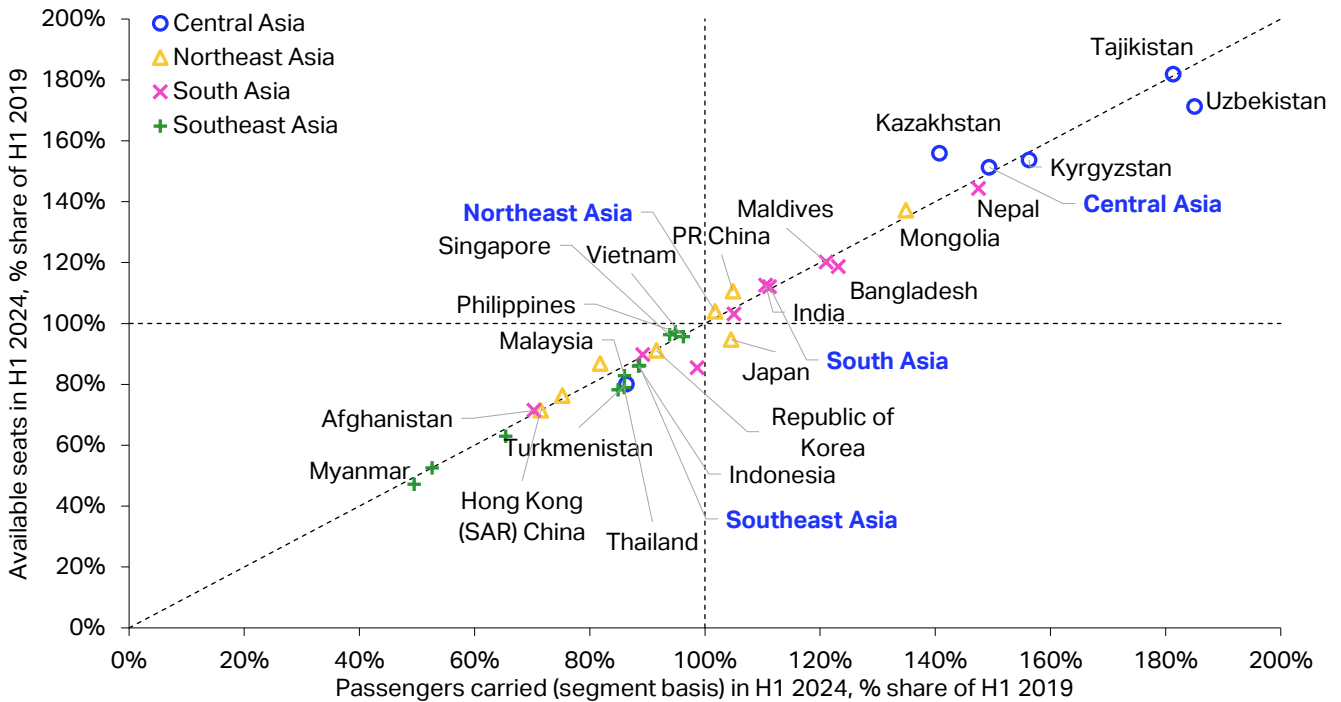


# Chart of the Week

30 August 2024

## Central Asia leads the growth in traffic in Asia

Available seats and passenger volumes, H1 2024 versus H1 2019, %



Source: IATA Sustainability and Economics, using data from DDS and OAG

- Air traffic growth is driven by the Asia region, with PR China catching up after lifting covid restrictions. But it is Central Asia that is showing the most outstanding performance in the region. In the first half (H1) of 2024, Tajikistan and Uzbekistan saw passenger demand and seat supply increase by over 80% compared to 2019, driven by both domestic and international markets. All countries in this subregion, except Turkmenistan, introduced more direct flights in 2023 compared to 2019.
- Northeast Asia's passenger levels and seat availability in H1 2024 exceeded 2019 by 2% and 4%, respectively. PR China led with an 11% increase in seat availability and a 5% rise in passenger volumes, driven by domestic demand, while the international segment is gradually catching up.
- Southeast Asia levels remain just below the 2019 numbers and performance varies by country. Vietnam and Singapore benefit from strong international flight demand, while the Philippines sees vibrant domestic activity. On the other hand, South Asian countries have mostly surpassed 2019 volumes, with Nepal and Bangladesh leading in terms of growth. India added nearly five times the absolute number of passengers accrued in the same period by Nepal and Bangladesh, driven by its domestic market. Sri Lanka, Bhutan, and Afghanistan continue to grow but remain below the 2019 level.
- Central Asia's stellar aviation performance is partly linked to overflight restrictions due to the war in Ukraine, with more routes from Europe to Southeast Asia and the Middle East flying via the countries in this subregion. Given the still fraught geopolitical climate, the Central Asian market is set to continue to outperform going forward.

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