

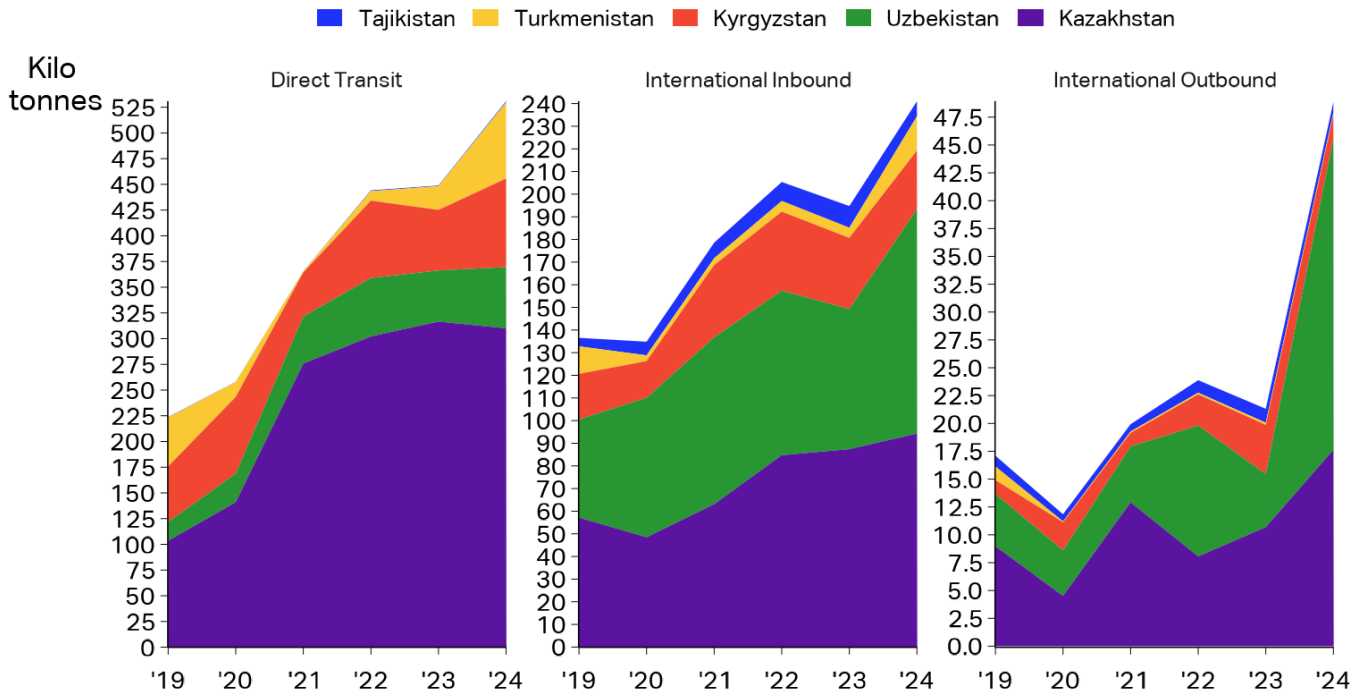


Chart of the Week

29 May 2026

Central Asia's Growing Role in Global Air Cargo Flows

Air Cargo in Central Asia by traffic type, thousand tonnes, 2019–2024



Source: IATA Sustainability and Economics, IATA Information and Data.

- The global air cargo map is evolving with new corridors growing in importance. Central Asia is transitioning into an intercontinental bridge: since 2019, regional volumes have more than doubled, while Hong Kong, the world's largest air cargo hub, remained broadly stable and Frankfurt's volumes, Europe's largest cargo gateway, declined by roughly 5%. Relative to these benchmarks, Central Asia's scale rose from just under one tenth of Hong Kong's throughput to nearly one fifth, and from less than one fifth of Frankfurt's volumes to more than two fifths.
- Much of this expansion stemmed from direct transit, mirroring the Anchorage technical stop model. The share of such movements surged from 59% to around 65% of the total air cargo in the region. International inbound and outbound cargo also increased, although inbound flows remain substantially larger.
- Across the combined inbound, outbound, and direct transit segments, Kazakhstan consolidated its position as the primary gateway thanks to total volumes rising by 149% in 2024 from 2019. However, Uzbekistan was the fastest growing market, expanding by 182% over the same period and overtaking Kyrgyzstan thanks to helpful infrastructure investments. The sharp rise in outbound volumes in 2024 also suggests that the region is evolving beyond simple technical stopovers toward more active connections and consolidation functions linking Europe and China.
- Central Asia's rise highlights how airspace constraints and the resulting network optimisation are redistributing traffic toward new intermediary corridors. While direct transit stops may generate limited local economic spillovers, sustained growth in inbound, outbound, and connecting flows strengthens the airport ecosystems and regional logistics capabilities over time.

IATA Sustainability & Economics

economics@iata.org

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