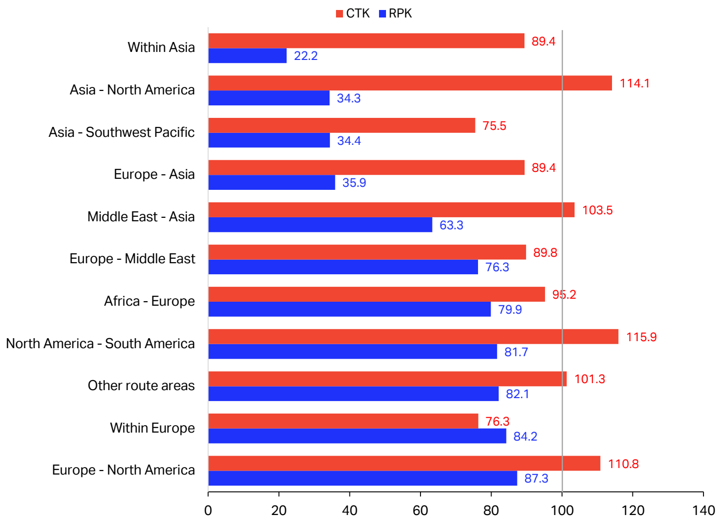
IATA Economics' Chart of the Week

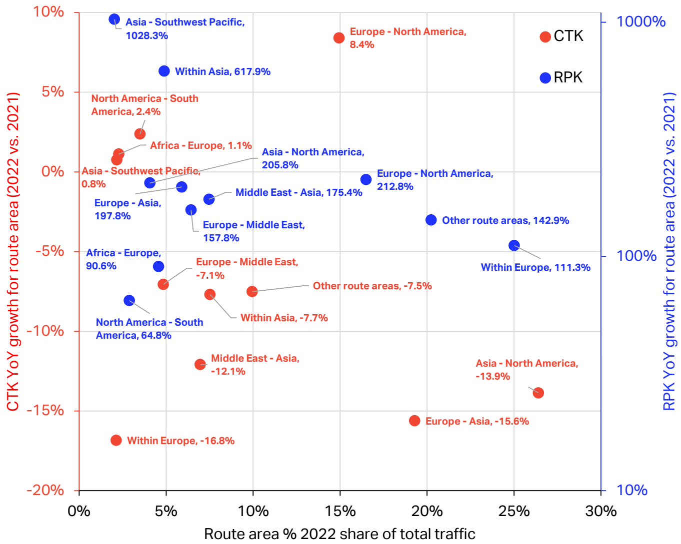
17 February 2023

Industry year-end review by route area

Panel A: Top 10 route areas by RPK and CTK in 2022 (Indexed, 2019 levels = 100)



Panel B: Year-on-year growth of industry demand in major route areas



RPK: Revenue-Passenger Kilometer; **CTK**: Cargo-tonne Kilometer
Source: IATA Monthly Statistics

- The aviation industry closed the year 2022 with many positive developments. International passenger demand measured by revenue passenger-kilometers (RPKs) soared globally and in the busiest route areas, owing to easing travel restrictions and pent-up demand for air travel. Regions where travel restrictions were lifted earlier have seen a stronger recovery in RPKs, reaching close to their pre-Covid levels of passenger traffic. Route areas within Europe and between Europe and neighboring regions such as Africa and the Middle East, as well as the Americas have recovered 76.3 to 87.3% of their 2019 RPKs (Panel A).
- International air cargo demand, measured by cargo-tonne kilometers (CTKs), sustained its strong performance in most of the top-10 route areas. Air cargo ended the year with more demand than pre-Covid levels for some route areas, including Asia – North America, Middle East – Asia, Europe – North America, and within Americas (Panel A).
- Compared with last year's performance, the industry saw remarkable year-on-year (YoY) growth of RPKs in the top route areas (Panel B). In 2022, the route area with the highest share of total passenger traffic was the within Europe market, which saw its RPKs increase by 111.3% YoY. On the other hand, despite the outstanding passenger traffic growth in the Asia-related route areas, these markets are still lagging in recovery to 2019 levels, and their contribution to total traffic remains significantly less than their pre-pandemic share.
- In comparison, international air cargo CTKs experienced YoY contractions in some of the biggest route area markets, such as Asia – North America (-13.9%) and Europe – Asia (-15.6%). This is mainly attributed to the outstanding performance that the air cargo industry achieved in 2021. Route areas that had YoY CTK growth in 2022 include Europe – North America (8.4%) and within Americas (2.4%) (Panel B).

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