BRIEF

International Air Connectivity in 2025

Global Trends and Developments

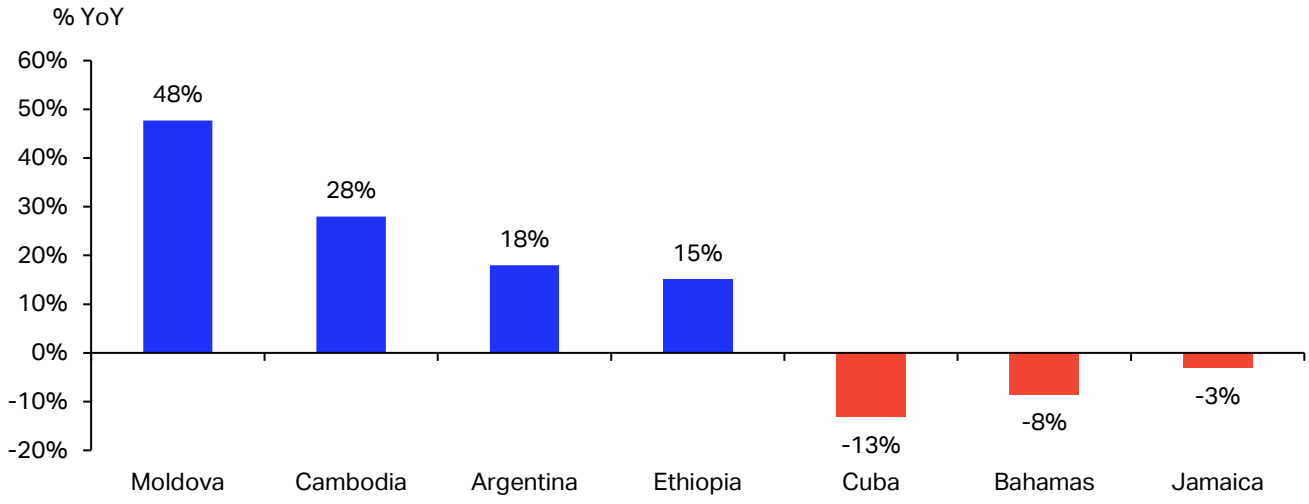
Introduction

Global international air connectivity as measured by IATA's Air Connectivity Index[1] increased solidly by 9% year-on-year (YoY) in 2025. Among the top 100 internationally connected markets, the majority posted gains last year while only a handful of countries saw their connectivity decline (Table 1). Strong air connectivity is a vector for economic development. It links countries to global markets and supply chains, improves competitiveness, and enables trade, tourism, and investment. Air connectivity brings people and families together, spreads ideas and innovation, and lifts the productivity of all industries that have access to it. Ultimately, air connectivity promotes peace and prosperity for all.

Drivers of Rising and Declining Connectivity

The countries that saw the largest relative increases in international connectivity in their respective regions in 2025 are Moldova, Cambodia, Argentina, and Ethiopia (Chart 1). At the other end of the spectrum, Cuba, the Bahamas, and Jamaica lost connectivity in 2025, YoY.

Chart 1: Largest % YoY international air connectivity gains and losses, country level, 2025 versus 2024



Source: IATA Sustainability and Economics based on OAG data
Note: The top % YoY gainers in Europe, Asia-Pacific, the Americas, and Africa, and all YoY decliners are shown, excluding Iran.

[1] **The IATA Air Connectivity Index is based on scheduled direct passenger flights available, considering frequency, seat capacity, and destination airport size. Further methodology information can be found under https://www.iata.org/economicsair-connectivity-measuring-the-connections-that-drive-economic-growth/.**

Moldova's international air connectivity increased by as much as 48% YoY in 2025, driven in large part by the continued closure of Ukrainian airspace. With Ukraine unable to operate civilian flights, a significant share of regional traffic has been diverted to Chișinău International Airport. Notably, up to a third of passengers traveling through Chișinău are Ukrainian citizens, underscoring how geopolitical instability can reshape mobility patterns. New routes launched in 2025 added links to Denmark, Sweden, and Bulgaria, further expanding Moldova's geographic reach and strengthening its position in the region.

Cambodia's international air connectivity improved by 15%, driven by regional dynamics. Inbound tourism demand from Asian markets such as China, Malaysia, Viet Nam, and Thailand has grown YoY. At the same time, the opening of the new Techo International Airport has expanded capacity for wide-body and long-haul operations, making the country more accessible and attractive to carriers. As a result, a direct Cambodia-UAE route was introduced in 2025, representing Cambodia's only nonstop destination outside of the Asia Pacific region.

Argentina, which adopted an Open Skies policy in 2024, has since signed or expanded agreements with numerous countries, including Brazil, Canada, Chile, the Dominican Republic, Ecuador, Mexico, Peru, Uruguay, Ethiopia, and Turkey. It remains one of the fastest-growing aviation markets in Latin America and globally, with international connectivity increasing by 18% YoY in 2025. Its top growing markets were the Dominican Republic, Ecuador, and Brazil, and 2025 also saw the launch of a direct air link between Argentina and New Zealand.

Ethiopia's international air connectivity expanded by 15% in 2025, strengthening its position as one of Africa's leading aviation hubs. This growth was underpinned by a large-scale infrastructure program that includes the expansion of Bole International Airport and the construction of a new mega-airport designed to eventually accommodate up to 100 million passengers. This enhances Ethiopia's competitiveness as a global transit point, enabling more direct connections between Africa and global markets and reducing the continent's structural reliance on European and Middle Eastern hubs for international travel. Nonetheless, the lack and slow growth of intra-African connectivity remains a challenge across the continent.

The largest declines in international connectivity in 2025 affected several major Caribbean markets, namely, Cuba, the Bahamas, and Jamaica.

Cuba's international air connectivity has been declining since 2017 and fell by another 12% in 2025 amid worsening economic and energy crises, weakening tourism, and reduced investment. Flights to and from its two largest markets—the United States and Canada—dropped by roughly 10% and 25% YoY, respectively, and direct services to the UK, Suriname, Argentina, and Haiti were discontinued.

The Bahamas lost 8% of its international air connectivity in 2025, as air travel tourism demand to the Bahamas has weakened and underperforms most other Caribbean destinations. While cruise tourism continued to expand, stopover tourists spend on average 28 times more than cruise passengers in the local economy[2]. Furthermore, reduced air services affected residents and businesses reliant upon dependable international links for trade, medical travel, education, and service provision. Flights to and from the US and UK were scaled back, while connections to Mexico and Portugal were cut entirely, introducing new constraints for this island economy which is wholly dependent on its connections with the rest of the world.

Jamaica's international air connectivity contracted by 3% year-on-year. Although connectivity had grown by 1% during the first ten months of 2025, it fell sharply after Hurricane Melissa struck in late October, disrupting air travel. The storm caused widespread, but generally short-lived, flight cancellations and temporary airport closures in several Caribbean countries. In Jamaica, however, the hardest-hit country, the resulting

[2] **Gomez Garcia, O., Mooney, H., Rosenblatt, D., Zegarra, M. A., Frazier, G., McCaskie, A., Gauto, V., Bollers, E., Christie, J., Khadan, J., & Abdul-Haqq, N. (2021).** ***Caribbean Quarterly Bulletin: Volume 10: Issue 1, May 2021.*** **https://doi.org/10.18235/0003265**

infrastructure damage continued to affect air connectivity for months. At the same time, air transport was essential for rapid disaster relief and recovery, delivering critical humanitarian supplies before sea freight resumed and helped tourism rebound, thereby stabilizing jobs in the country's largest economic sector.

Overall, global air connectivity strengthened in 2025. Countries investing in infrastructure, that liberalize and promote route expansion captured significant gains. The countries that have seen the greatest losses in international air connectivity were affected by various local difficulties, such as economic crises, weakened air tourism demand, or severe weather events. Their reduced air connectivity was not a result of home-grown policies – it was foisted upon them. Restoring connectivity will be necessary as these countries now risk facing worsening economic outcomes.

Table 1: Top 100 countries based on the International Connectivity Index in 2025

Country	2025 Rank	2024 Rank	Ranking difference	International connectivity growth (YoY)
United States	1	1	=	4%
United Kingdom	2	2	=	5%
China (People's Republic of)	3	4	↑1	18%
Germany	4	3	↓1	6%
Japan	5	6	↑1	17%
Spain	6	5	↓1	8%
Italy	7	7	=	10%
United Arab Emirates	8	8	=	10%
France	9	9	=	6%
India	10	10	=	9%
Thailand	11	11	=	6%
Korea (Republic of)	12	12	=	10%
Türkiye	13	14	↑1	9%
Canada	14	13	↓1	3%
Singapore	15	15	=	6%
Mexico	16	16	=	2%
Hong Kong (SAR), China	17	18	↑1	12%
Saudi Arabia	18	17	↓1	8%
Chinese Taipei	19	19	=	13%
Malaysia	20	20	=	11%
Vietnam	21	24	↑3	20%
Australia	22	23	↑1	13%
Indonesia	23	25	↑2	14%
Netherlands	24	21	↓3	6%
Switzerland	25	22	↓3	7%
Qatar	26	26	=	5%
Portugal	27	27	=	13%
Greece	28	28	=	12%
Philippines	29	29	=	10%
Egypt	30	30	=	13%
Ireland	31	31	=	6%
Poland	32	32	=	14%
Russian Federation	33	33	=	13%
Austria	34	34	=	7%
Denmark	35	35	=	6%
Brazil	36	36	=	14%
Pakistan	37	37	=	11%
Belgium	38	38	=	10%
Morocco	39	39	=	12%
Sweden	40	40	=	3%
Dominican Republic	41	41	=	5%
Norway	42	42	=	5%
Colombia	43	43	=	9%
Kuwait	44	44	=	0%
Finland	45	46	↑1	11%
Romania	46	45	↓1	10%
Israel	47	56	↑9	40%
Czechia	48	50	↑2	13%
Hungary	49	49	=	10%

New Zealand	50	47	↓3	2%
Panama	51	53	↑2	10%
Bangladesh	52	48	↓4	3%
Argentina	53	58	↑5	18%
South Africa	54	54	=	10%
Ethiopia	55	57	↑2	15%
Cyprus	56	59	↑3	20%
Bahrain	57	51	↓6	1%
Oman	58	52	↓6	0%
Sri Lanka	59	61	↑2	18%
Algeria	60	60	=	11%
Iran	61	55	↓6	-4%
Jordan	62	62	=	11%
Croatia	63	63	=	10%
Peru	64	64	=	9%
Serbia	65	66	↑1	13%
Cambodia	66	76	↑10	28%
Chile	67	67	=	8%
Costa Rica	68	65	↓3	5%
Uzbekistan	69	71	↑2	15%
Tunisia	70	68	↓2	5%
Lebanon	71	79	↑8	23%
Kazakhstan	72	74	↑2	10%
Macao (SAR), China	73	69	↓4	0%
Iraq	74	72	↓2	1%
Maldives	75	75	=	6%
Jamaica	76	70	↓6	-3%
Iceland	77	73	↓4	0%
Nepal	78	78	=	7%
Kenya	79	77	↓2	1%
Bulgaria	80	80	=	9%
Malta	81	84	↑3	16%
El Salvador	82	81	↓1	4%
Azerbaijan	83	83	=	6%
Georgia	84	87	↑3	22%
Albania	85	86	↑1	6%
Bahamas	86	82	↓4	-8%
Nigeria	87	88	↑1	7%
Ecuador	88	89	↑1	3%
Cuba	89	85	↓4	-13%
Guatemala	90	90	=	5%
Latvia	91	91	=	6%
Mauritius	92	92	=	3%
Luxembourg	93	93	=	6%
Moldova	94	100	↑6	48%
Tanzania	95	95	=	14%
Lithuania	96	94	↓2	10%
Aruba	97	96	↓1	5%
Lao People's Democratic Republic	98	99	↑1	19%
Myanmar	99	97	↓2	5%
Armenia	100	98	↓2	9%

Source: IATA Sustainability and Economics based on OAG data.