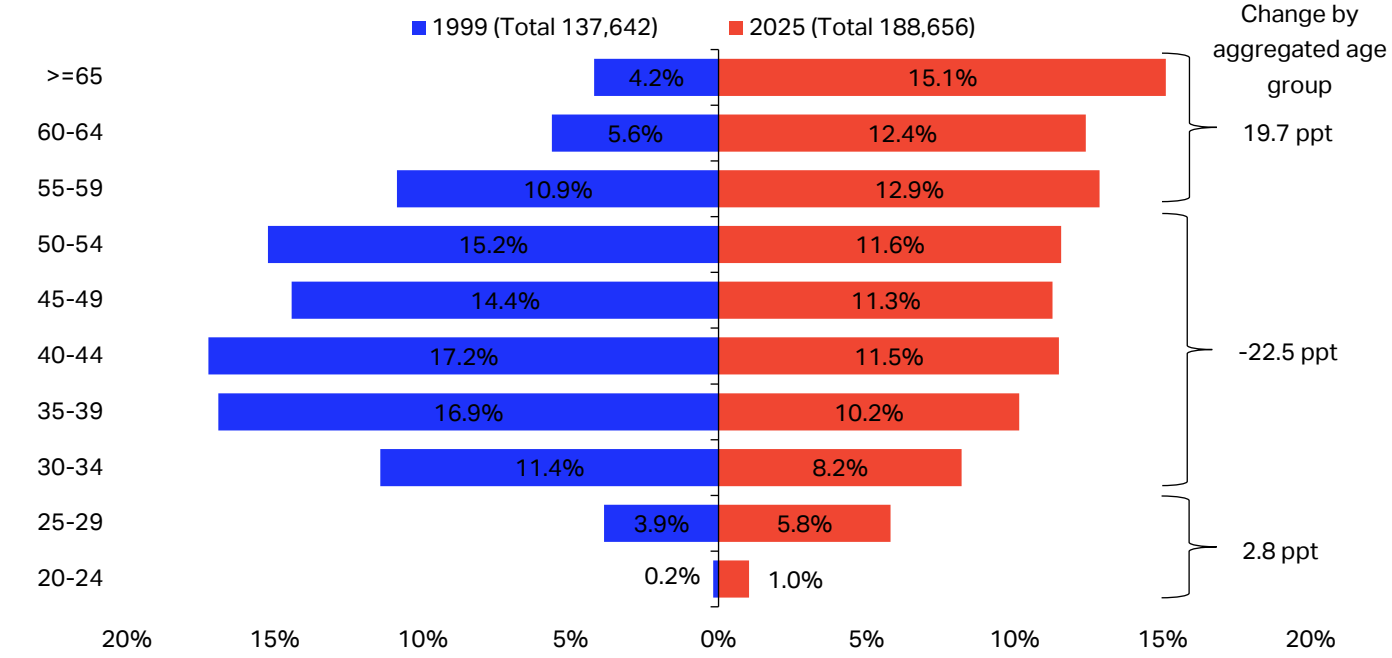
Chart of the Week

17 July 2026

US Pilot Demographics Could Challenge Long-Term Growth

Age composition of US airline transport pilot license (ATPL) holders in 1999 and 2025



Source: IATA Sustainability and Economics using US Federal Aviation Administration (FAA) data. Percentages in the horizontal bars may not sum precisely to the aggregated percentage point changes due to rounding.

- With passenger demand expected to double over the next two decades, the aviation industry faces a structural labor challenge shaped by demographic shifts and aging populations. This pressure is particularly evident in the US, where a tightening pilot supply pipeline reflects upcoming retirements, high training costs, and stringent regulatory requirements.
- The share of US pilots aged 55 and older increased by a sizeable 19.7 percentage points (ppt), while the average pilot age rose by nearly five years, from around 45.6 to 50.4 between 1999 and 2025. Over the same period, the share of pilots aged 20–29 increased by only 2.8 ppt, and the segment of prime-age pilots (30–54) declined by a significant 22.5 ppt.
- The US regulatory reform implemented in 2013 raised the flight-hour requirement for Air Transport Pilot (ATP) certificates operating under the 14CFR Part 121 from 250 hours to 1,500, significantly increasing time and certification costs, and creating barriers for new entrants. In Europe, first-officer entry requirements range from 200 to 250 hours, depending on the training route. Although these figures are not directly comparable, they illustrate regulatory fragmentation across jurisdictions and highlight an opportunity to strengthen global harmonization without compromising safety. Key avenues for further alignment could include streamlined mutual recognition of credentials, standardized curricula, and modular bridging programs to support transitioning pilots.
- Without renewed engagement and investment in training and harmonization, pilot shortages could become an increasing challenge for airlines over the coming years, putting long-term industry growth at risk and limiting the economic benefits that the industry delivers.

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