



# IATA Update

ISPACG40 Meeting  
Brisbane, Australia  
5-7 May 2026

**John Moore**  
Head ATM-CNS, Asia-Pacific  
Operations, Safety & Security



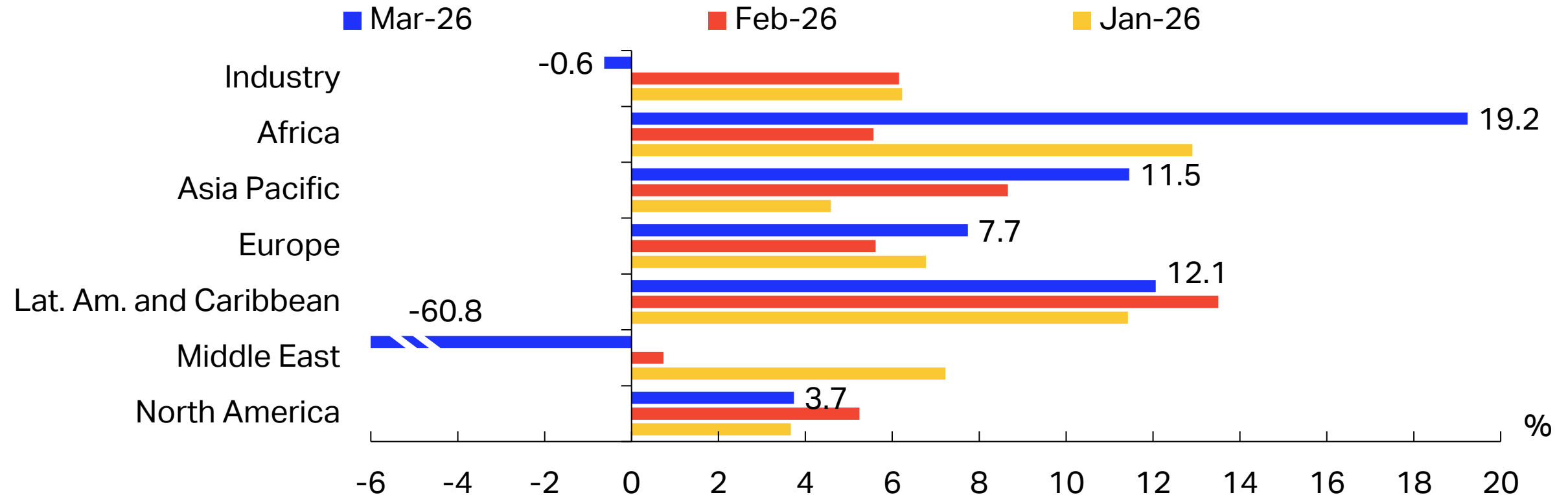
# Air Passenger Market Analysis March 2026

- Industry-wide Revenue Passenger Kilometers (RPK) growth slowed to 2.1% year-on-year (YoY) in March (from 6.1% in February), while Passenger Load Factor (PLF) reached a record high for March, at 83.6%.
- Traffic carried by Middle Eastern carriers contracted by more than half, amid the impact of the conflict in the region. Airlines from other regions broadly maintained or saw accelerated growth.
- Domestic traffic growth accelerated slightly in March, supported by double-digit expansions in the Chinese and Brazilian domestic markets.
- International traffic declined modestly at the industry level, largely due to the contraction in traffic among Middle Eastern airlines.
- Global scheduled seat capacity is expected to return to growth in May, following the contraction observed in April.

# 0.6% YoY decline in international traffic for March

## Asia Pac, Europe and Africa carriers benefitted from diverted ME traffic

### International RPK growth by airline region of registration, YoY, %

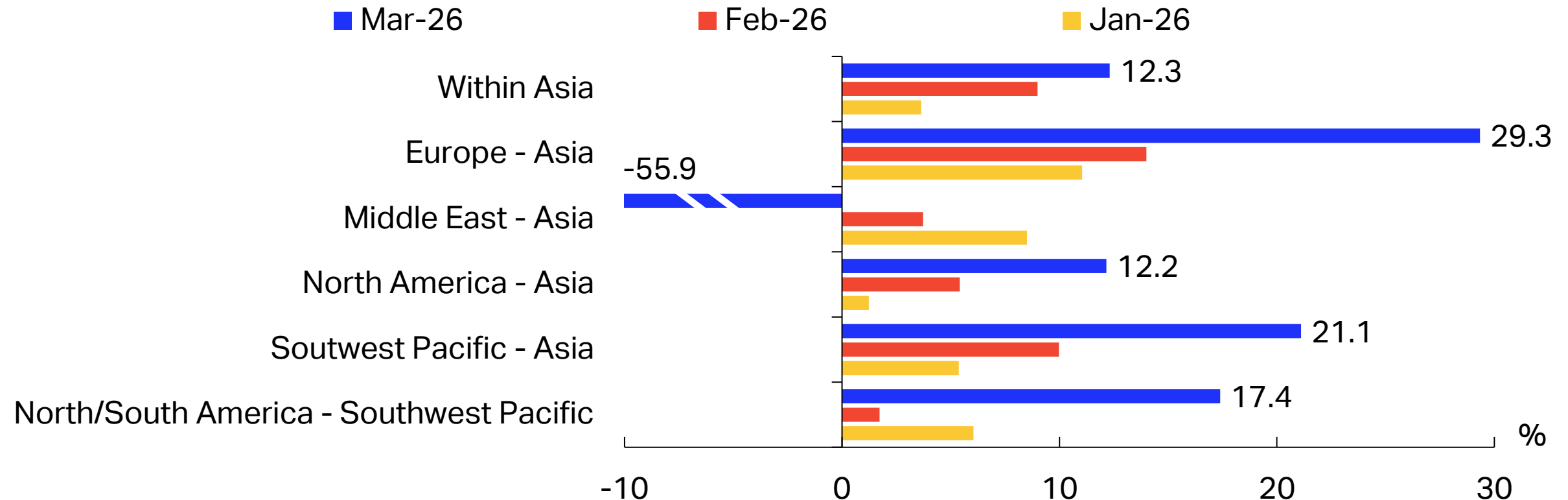


Source: IATA Sustainability and Economics using data from IATA Information and Data - Monthly Statistics

# Accelerated growth on most Asia Pac int routes

## Due to ME conflict and tail-end of LNY falling in March this year

### RPK growth across major Asia Pacific international route areas, YoY, %

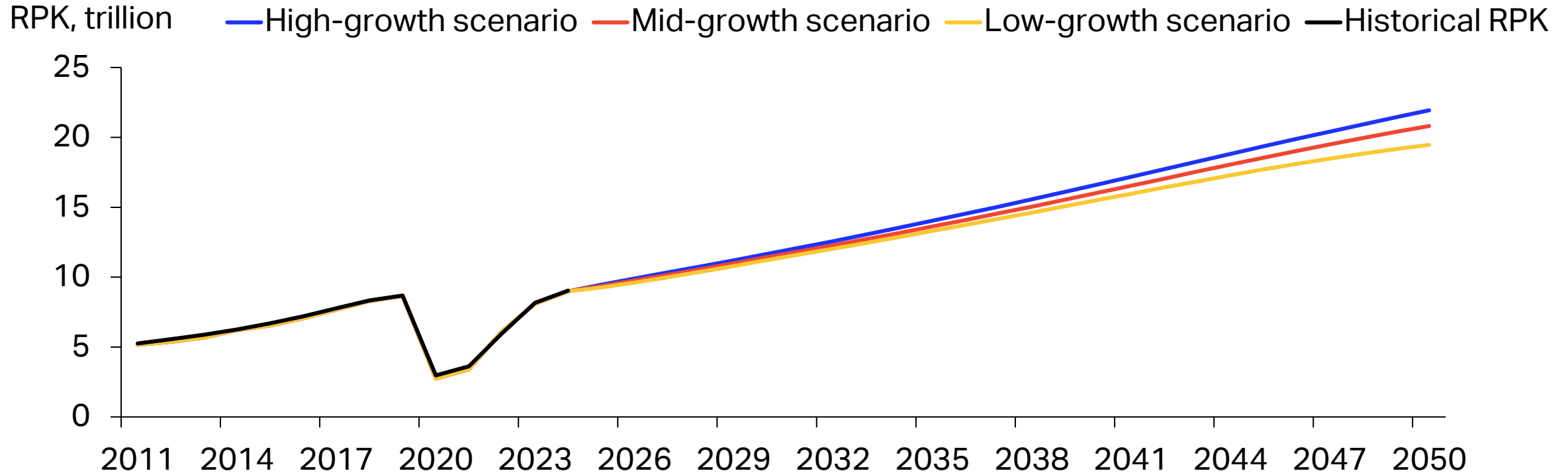


Source: IATA Sustainability and Economics, IATA Information and Data - Monthly Statistics. Route areas are ordered by size, from largest to smallest

# Global traffic to grow 3.1% annually through 2050

## Total RPK expected to reach 20.8 trillion under the mid-growth scenario

### IATA long-term industry RPK projections, trillion



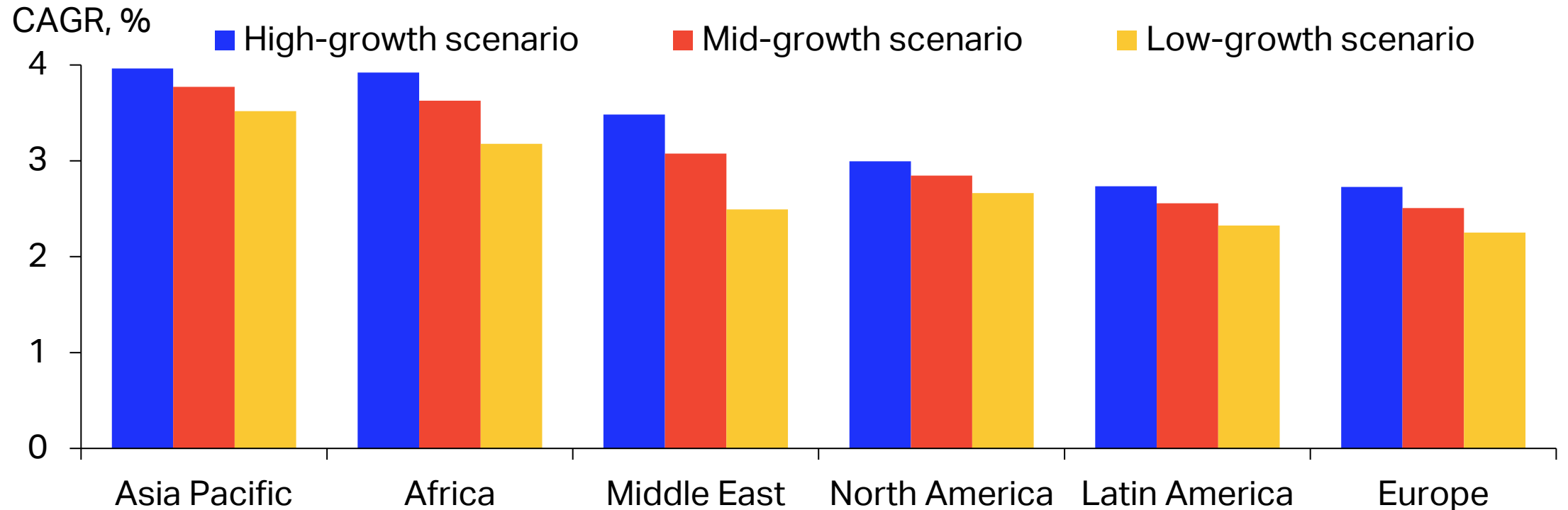
Source: IATA Sustainability and Economics

Note: RPKs over 2011-2024 are for model validation, and RPKs over 2025-2050 are projections

# Asia Pacific leads growth among all regions

## CAGR of 3.8% in the mid-growth scenario

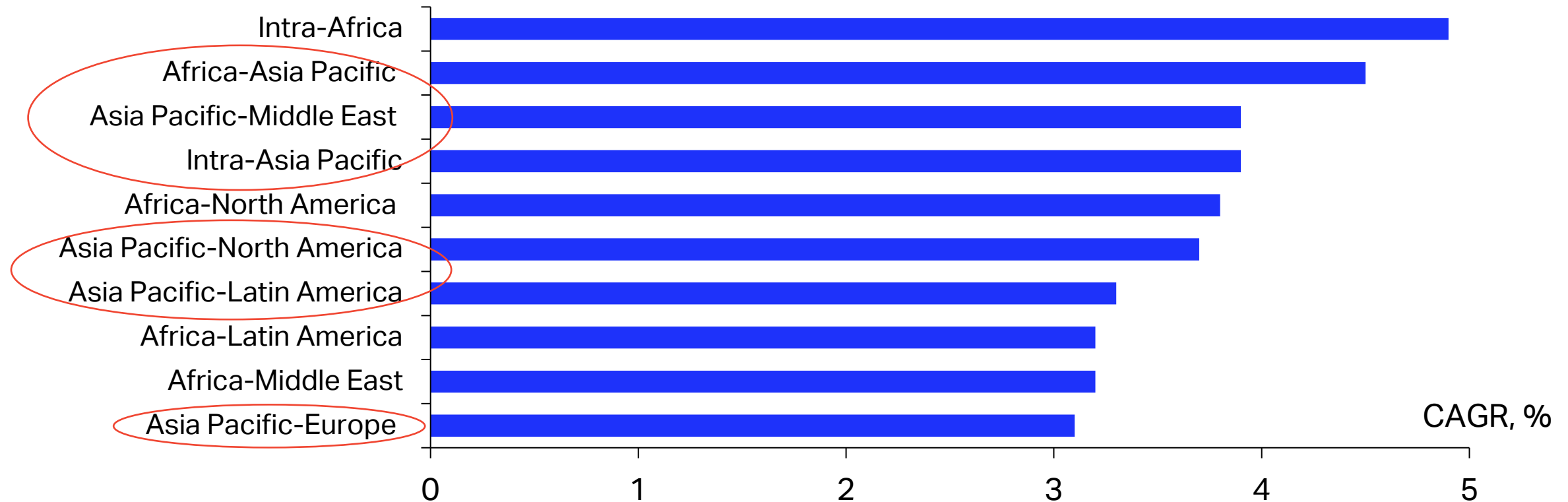
**Projected RPK growth over 2024-2050 by region and by scenario, %**



Source: IATA Sustainability and Economics

# Asia Pacific in six of top ten fastest-growing region pairs

**Projected RPK growth of top ten fastest growing region pairs, mid-growth scenario, 2024-2050, %**



Source: IATA Sustainability and Economics

# Current IATA ASPAC issues / priorities

- Afghanistan & BoBCAT
- GNSS Radio Frequency Interference (RFI)
- Spectrum Resilience
- Myanmar ANS issues and RFI
- 30/10 Project for capacity
- Regional ATFM
- APAC ANSP Committee (AAC) Pathfinder TBO projects

# Thank you!



Detailed Air Passenger Market Analysis for March 2026 can be found at:  
<https://www.iata.org/en/iata-repository/publications/economic-reports/air-passenger-market-analysis-march-2026/>