

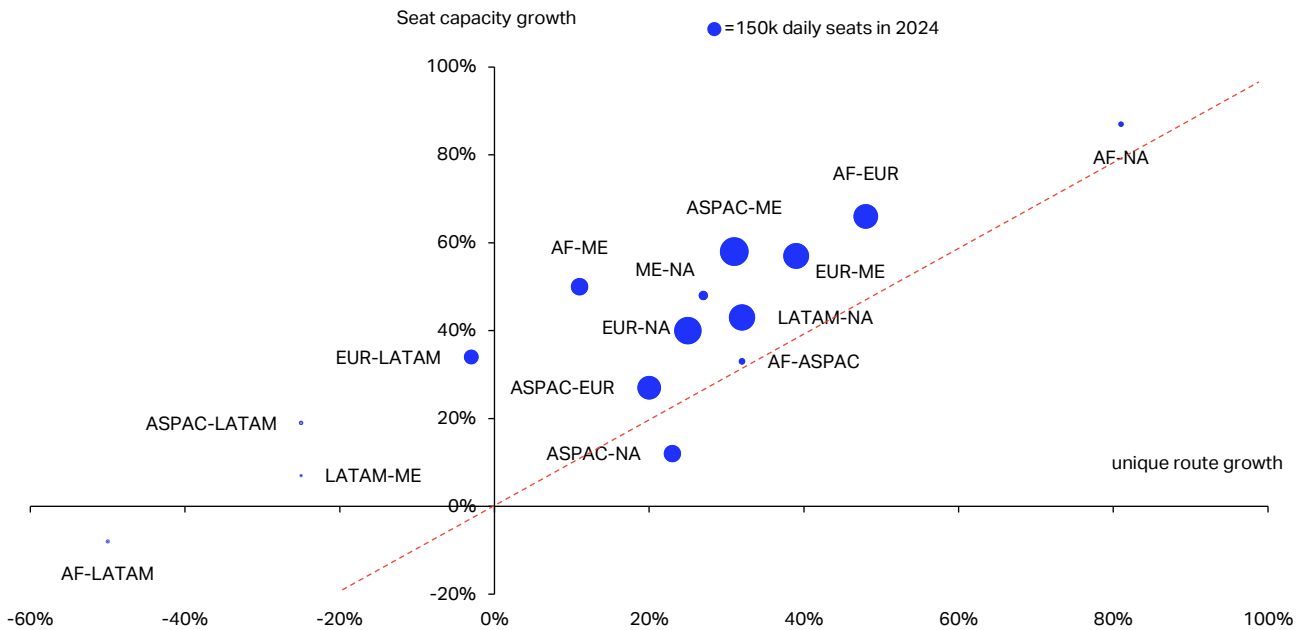


# Chart of the Week

21 March 2025

## Interregional traffic growth reflects capacity over new routes

### Growth of the number of unique interregional routes and available seats, 2014-2024



Source: IATA Sustainability & Economics, based on OAG data.

Note: This includes routes (airport pairs) with at least one scheduled passenger flight a week on average. Seat capacity/unique route growth and daily seats are calculated bidirectionally. AF: Africa, ASPAC: Asia Pacific, EUR: Europe, LATAM: Latin America & Caribbean, ME: Middle East, NA: North America.

- Interregional air passenger traffic increased by 45% over the past decade, accounting for 16.5% of total traffic in 2024. Growth is enabled by a combination of increasing the available seat capacity on existing routes and the number of unique routes flown. Interregional seat capacity has grown by 44% since 2014, while unique routes have risen by 30%. This trend is reflected across the four busiest route areas: Europe-North America, Latin America-North America, Asia Pacific-Middle East, and Europe-Middle East.
- The expanded role of the Middle East as a transfer hub for Europe-Asia Pacific traffic is evident in the expansion of seat capacity and routes by around 58% and 35%, respectively – much higher than the increases in direct traffic (27% and 20%). While the Middle East has become a more popular choice for stopovers, it also reflects the diversion of traffic resulting from the conflict between Russia and Ukraine.
- Asia Pacific-North America is the only market where route growth has outpaced seat growth. In 2014, China PR-US was the second most traveled route in this market, and by 2024, the seat capacity between these two countries had fallen by more than 60%. On the other hand, South Korea, Chinese Taipei, and India have all greatly expanded the number of direct routes to North America by 60% collectively and over the same period.
- The least traveled interregional routes have seen the largest relative shifts (in % terms), mainly due to their smaller size. The Africa-North America market leads in both seat and route growth (both exceed 80%) over the period, benefitting primarily from increased tourism demand, albeit from a low starting point.
- New-generation aircraft, e.g., narrowbody aircraft with a longer operating range that can open “thinner” markets, on the one hand, and intensifying capacity constraints at major airports, on the other hand, will influence how airlines allocate capacity on which routes going forward.

IATA Sustainability & Economics

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