WORLD AIRPORT TRAFFIC FORECASTS 2025–2054

AIR TRAFFIC FORECASTS AT GLOBAL, REGIONAL, AND COUNTRY LEVELS

2025 EDITION

EXECUTIVE SUMMARY

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ACI World Airport Traffic Forecasts 2025–2054

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NEAR-TERM OUTLOOK

9.8B PASSENGERS IN 2025

↑3.6% YOY

10.2B PASSENGERS PROJECTED IN 2026

↑3.9% YOY

LONG-TERM OUTLOOK

3.4% COMPOUND ANNUAL GROWTH RATE 2024-2044

3% COMPOUND ANNUAL GROWTH RATE 2024-2054

x2 PASSENGER LEVEL BY THE MID 2040s

x2.5 PASSENGER LEVEL BY 2054

Highlights

Regional passenger traffic – long-term projections (2054)

- **Africa**: 754 million passengers (3.6% CAGR, 2024–2054)
- **Asia-Pacific**: 10 billion passengers (3.6% CAGR)
- **Europe**: 5.1 billion passengers (2.4% CAGR)
- **Latin America and the Caribbean**: 1.9 billion passengers (3.1% CAGR)
- **Middle East**: 1.4 billion passengers (3.9% CAGR)
- **North America**: 4.1 billion passengers (2.3% CAGR)

Global air cargo – near-term outlook

- **2025** volume: **129 million metric tonnes** (+2.9% YoY) (to be confirmed by ACI World in July 2026)
- **2026** volume: **133 million metric tonnes** (+3.1% YoY)

Aircraft movements – near-term outlook

- **2025** movements: **101 million (+2.3% YoY)** (to be confirmed by ACI World in July 2026)
- **2026** movements: **104 million (+2.3% YoY)**

Executive Summary

ESTABLISHING THE NEW AVIATION BASELINE

The year 2024 marked a significant milestone for global air transport, as passenger traffic reached and exceeded 2019 levels (pre-pandemic), signalling the completion of the extraordinary traffic rebound phase observed in recent years. By 2025, the global aviation industry entered a more mature operating environment, where traffic growth is increasingly shaped by structural demand patterns and regional divergence rather than short-term catch-up effects.

The **ACI World Airport Traffic Forecasts (WATF) 2025–2054** therefore establishes a new baseline for global aviation demand. The forecast incorporates the latest analytical insights reflecting lasting changes in travel patterns, differentiated regional performance, evolving passenger behaviour, reconfigured airline networks, and cargo markets increasingly influenced by global trade realignment and supply chain resilience.

From recovery to stabilization: a slower but growing system

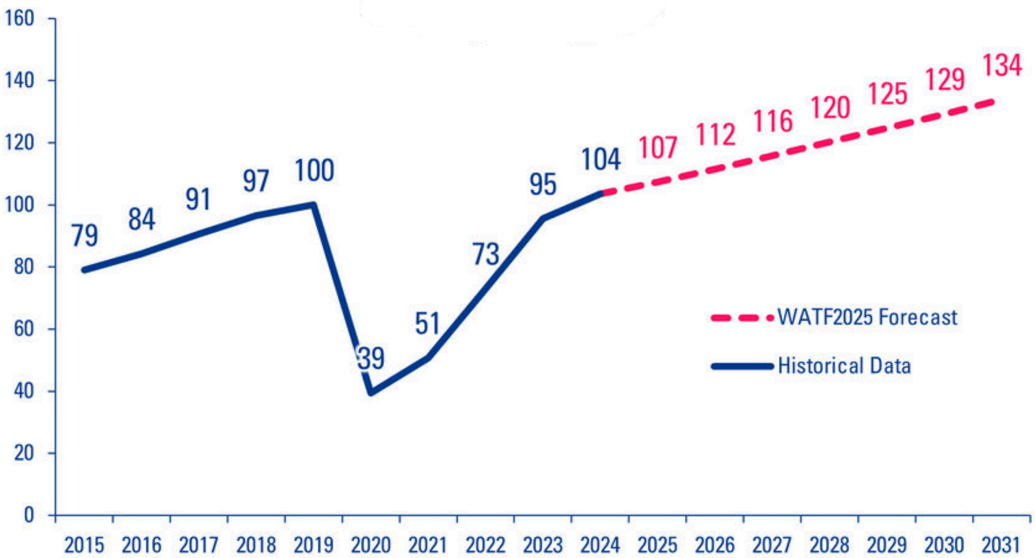
By October 2025 year-to-date (YTD), global passenger traffic increased by 3% year-on-year (YoY), reaching 106% of the October 2019 YTD level. The domestic market recorded no growth compared with 2024 YTD, falling below last year's expectations due to weakened domestic traffic in North America. While overall passenger traffic moderated, leading indicators, such as scheduled seat capacity and advanced bookings, suggest signs of demand stabilization and growth (see **Airport Industry Report Q3 & 9M 2025** for further information).

International passengers, by contrast, recorded robust growth of 5% YoY, reaching 107% of the 2019 level and maintaining a positive upward trajectory.

Monthly Global Domestic and International Passenger Traffic
(2019–October 2025)

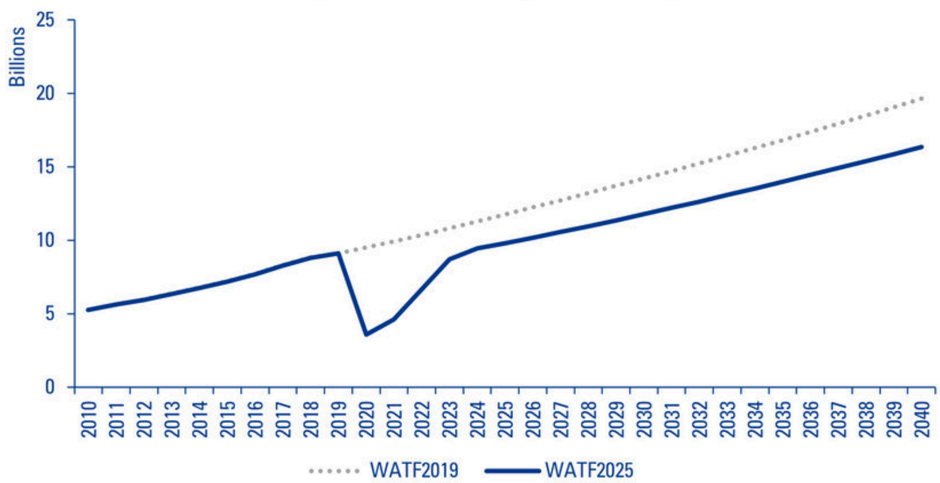
By the end of 2025, global passenger traffic reached 9.8 billion passengers, equivalent to 107% of the 2019 level, with 3.6% YoY growth (to be confirmed by ACI World in July 2026). This pace is broadly in line with historical growth trends observed prior to 2020 (2018–2019 growth rate: 3.5%), indicating that the global market has transitioned into a post-recovery phase driven by structural, long-term growth patterns. At the regional and market levels, however, growth outcomes diverge significantly, with some differences more pronounced than in the pre-pandemic period.

Medium-Term Global Total Passenger Traffic Forecast
(indexed, 2019 = 100)



While passenger volumes have returned to historical benchmarks, the effects of the recent disruption continue to shape the long-term outlook. Compared with pre-pandemic growth expectations, global passenger traffic is estimated to have lost approximately four to five years of growth potential, resulting in a permanent gap between previous and current demand trajectories. The aviation system entering the second half of the 2020s is therefore smaller than once anticipated but remains fundamentally stable and positioned for sustained long-term expansion.

2025 Projection vs 2019 Projection
(World, Total Passengers, 2010–2040)



What this new baseline means for global aviation

In the context of the WATF 2025–2054, the new aviation baseline does not imply a return to historical norms. Instead, it reflects a global aviation environment shaped by lasting structural changes that have emerged over recent years, including:

- **Structural divergence across regions and markets**, with some exceeding 2019 levels by a wide margin while others remain structurally below previous benchmarks.
- **A rebalancing between domestic and international traffic**, as international markets regain momentum while domestic demand in several mature economies show signs of long-term adjustment.
- **Capacity-constrained growth**, shaped by aircraft delivery delays, supply chain bottlenecks, and shifts in airline capacity deployment.

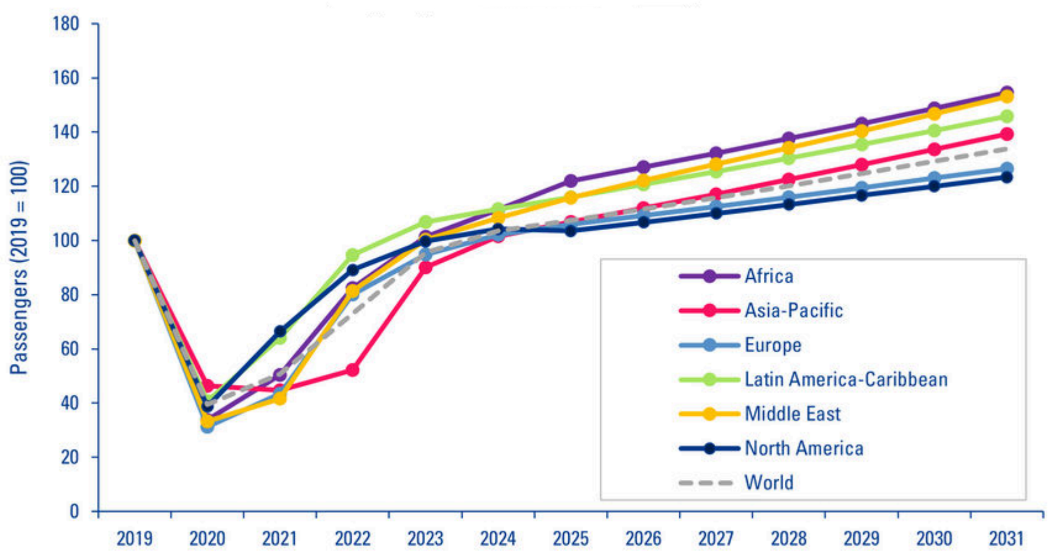
- **Persistent geopolitical and economic uncertainty**, influencing route structures, operating costs, and passenger sentiment.
- **A reconfigured air cargo market**, increasingly driven by e-commerce, supply chain resilience, and trade diversion rather than cyclical recovery dynamics.

These characteristics form the analytical foundation of the WATF 2025–2054 and are examined in depth through regional and market-level analysis.

Regional divergence as the defining feature of the new baseline

One of the most prominent features of the new global aviation baseline is the lack of synchronized growth. While aggregate global traffic has returned to historical benchmarks, regional and national outcomes diverge significantly, reflecting differences in economic conditions, market maturity, policy environments, and capacity availability.

Medium-Term Passenger Traffic Forecast by Regions
(indexed, 2019 = 100)



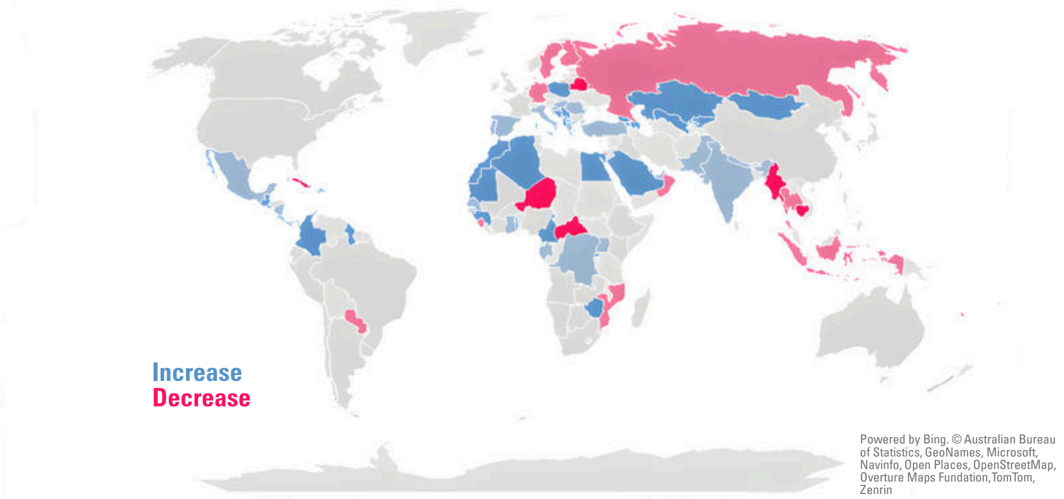
By the end of 2025, total passengers from each region reached (to be confirmed by ACI World in July 2026):

- **Africa**: **274 million** passengers (+9.6% YoY)
- **Asia-Pacific**: **3.6 billion** passengers (+5.3% YoY)
- **Europe**: **2.5 billion** passengers (+3.6% YoY)
- **Latin America-Caribbean**: **790 million** passengers (+3.8% YoY)
- **Middle East**: **471 million** passengers (+6.9% YoY)
- **North America**: **2.1 billion** passengers (-0.7% YoY).

Several emerging and leisure-oriented markets, such as, Southeast Europe, South Caucasus, Central Asia, parts of the Mediterranean, South Asia, the Middle East, and Central America and the Caribbean, have significantly exceeded their 2019 passenger volumes. These markets have benefited from strong leisure and visiting-friends-and-relatives (VFR) demand, expanded low-cost carrier presence, liberalized market access, and, in some cases, traffic re-routing driven by geopolitical disruptions.

In contrast, parts of Western and Northern Europe, selected Southeast Asian markets, and conflict-affected regions continue to underperform relative to pre-2019 levels. In these markets, weaker domestic demand, modal substitution toward rail, environmental and policy constraints, infrastructure limitations, and delayed aircraft deliveries, as well as ongoing geopolitical risks point to structural demand shifts rather than temporary recovery delays.

Change in Total Air Passengers by Market
(2019 – 2025)



This divergence underscores a key feature of the new aviation baseline: growth opportunities are increasingly concentrated and uneven, requiring airports to move beyond global averages and focus on market-specific demand drivers and risk profiles. A detailed analysis of market divergence is provided in the WATF 2025–2054 Annex 16, Traffic Trends by Market.

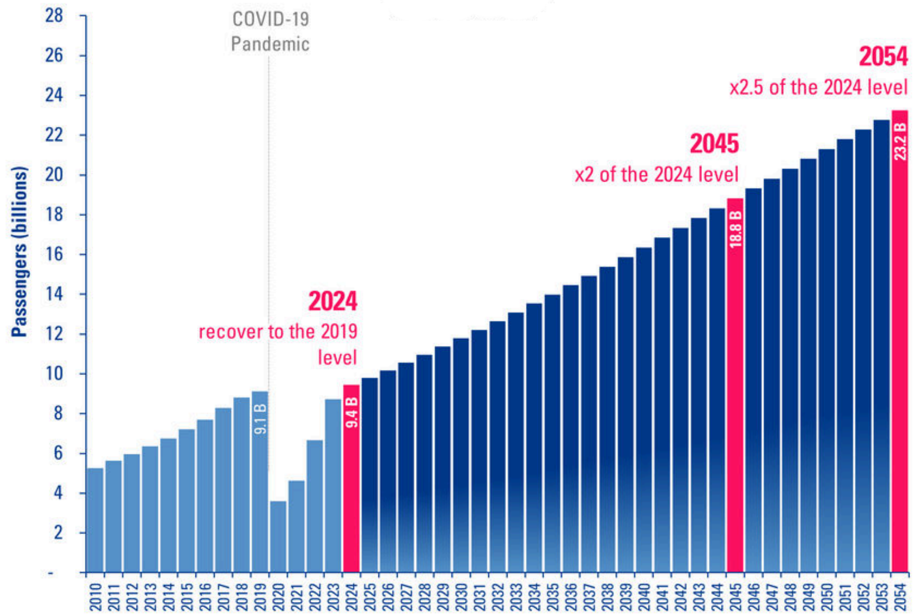
Uncertainty as a structural feature

Unlike the recovery period, when uncertainty primarily affected the timing of demand return, the current operating environment embeds uncertainty directly into long-term planning. Geopolitical tensions, trade policy fragmentation, economic volatility, infrastructure limitations, and persistent aircraft supply constraints are expected to continue shaping traffic outcomes across both passenger and cargo markets.

These factors do not undermine the long-term growth outlook but reinforce the need for resilience-oriented planning, flexible capacity strategies, and diversified traffic portfolios.

Long-term outlook: growth on a new trajectory

Long-Term Global Passenger Traffic Forecast
(2010 – 2054)

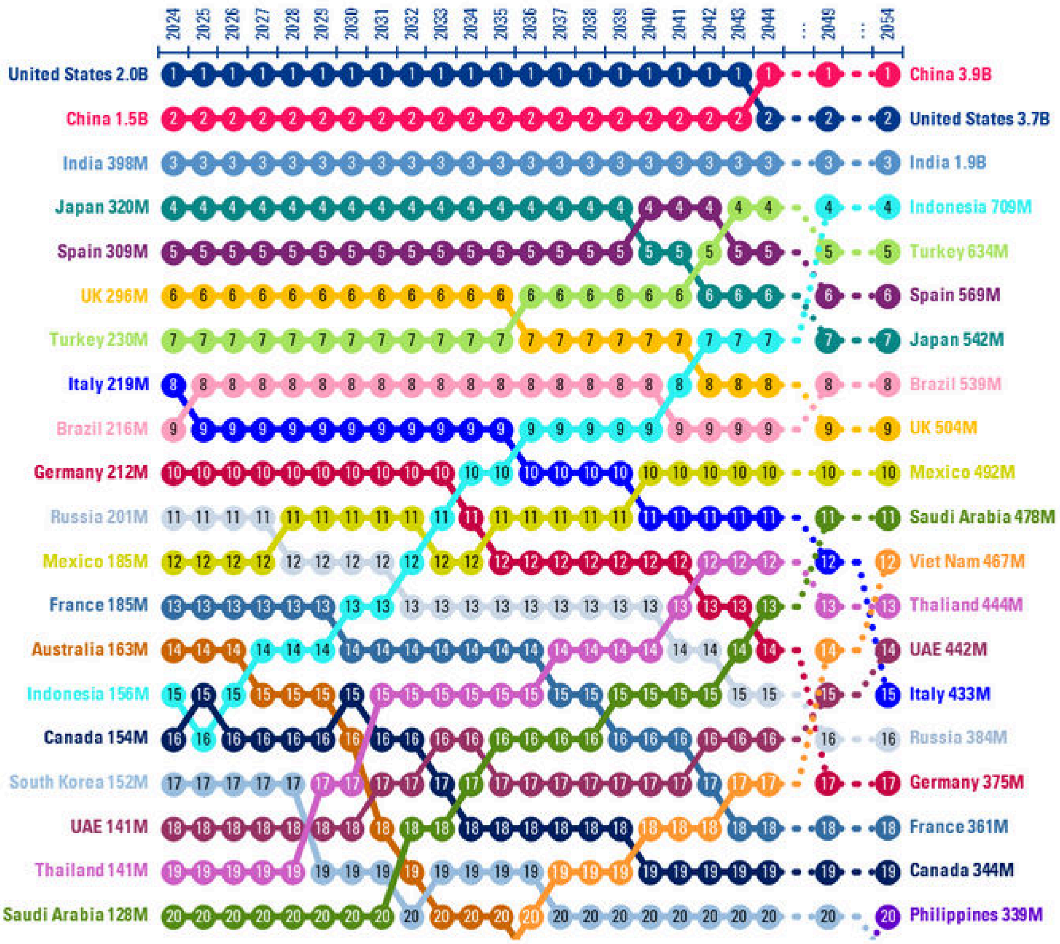


Between 2024 and 2054, global passenger traffic is expected to grow at a 3% CAGR, more than doubling by the mid-2040s to reach 23.2 billion passengers and rising to roughly 2.5 times the 2024 level by 2054.

Long-term growth is driven primarily by emerging and developing markets. By 2054, each region is expected to reach:

- **Africa**: **754 million** passengers (3.6% CAGR, 2024–2054)
- **Asia-Pacific**: **10 billion** passengers (3.6% CAGR)
- **Europe**: **5.1 billion** passengers (+2.4% CAGR)
- **Latin America-Caribbean**: **1.9 billion** passengers (+3.1% CAGR)
- **Middle East**: **1.4 billion** passengers (+3.9% CAGR)
- **North America**: **4.1 billion** passengers (+2.3% CAGR)

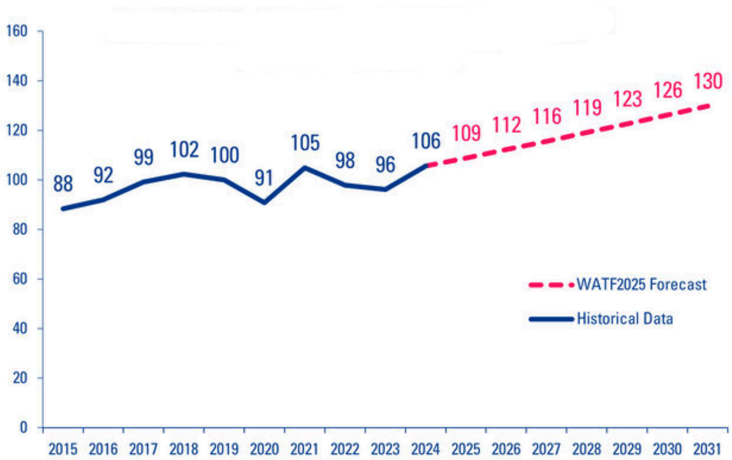
Top 20 Markets by Total Passenger Traffic
(2024 – 2054)



Air cargo outlook

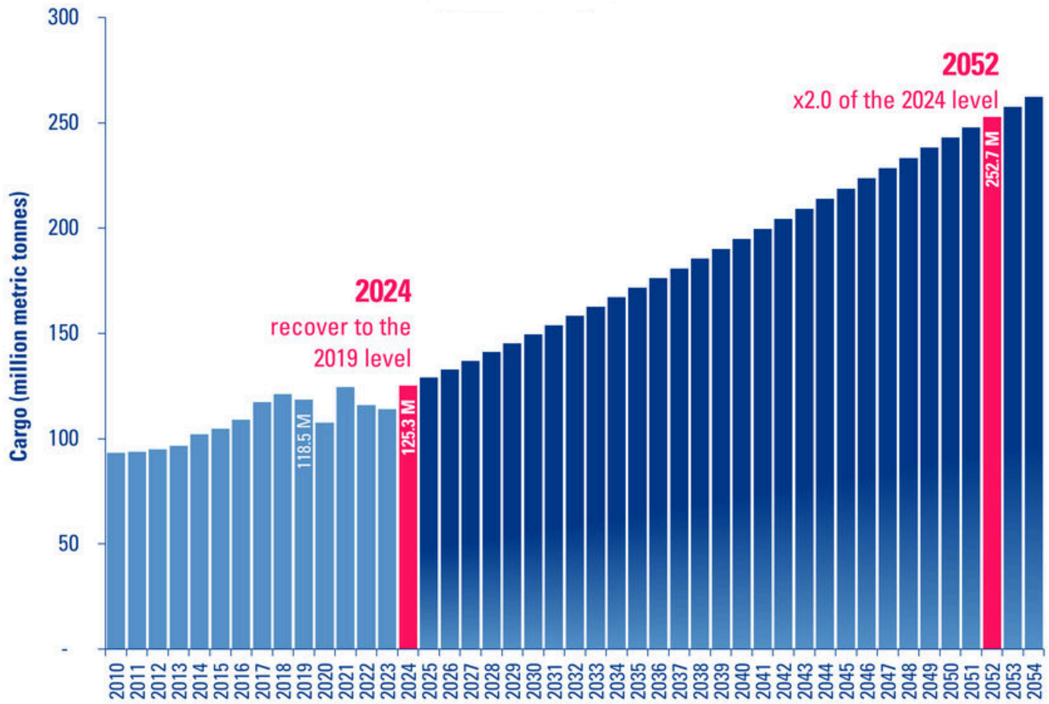
In 2025, the global air cargo market reached 129 million metric tonnes (to be confirmed by ACI World in July 2026), reflecting 2.9% YoY growth, supported by sustained e-commerce demand. Looking ahead, cargo growth is expected to continue, although uncertainty from trade fragmentation, geopolitical tensions, and evolving industrial policies is reshaping cargo flows, leading to lane shifts, hub repositioning, and greater specialization among airports.

Medium-Term Global Total Air Cargo Forecast
(indexed, 2019 = 100)



Over the long term, global air cargo volume is projected to reach 262 million metric tonnes by 2054, with a CAGR of 2.5% between 2024 and 2054.

Long-Term Global Total Air Cargo Forecast
(2010–2054)



ACI WORLD AIRPORT TRAFFIC FORECASTS 2025–2054

Establishing the new global aviation baseline

We are excited to announce the release of the latest **ACI World Airport Traffic Forecast (WATF) 2025–2054,** which establishes a new baseline for global aviation demand. The forecast horizon offers a comprehensive 30-year perspective on global airport demand globally, regionally, and at the country level.

The MS Excel dataset provides granular demand forecasts for short-, medium-, and long-term periods across the following airport traffic categories:

- **Total passengers** (international and domestic)
- **Air cargo volumes** (in metric tonnes)
- **Total aircraft movements**

The latest iteration of this flagship report covers data sourced from **176 markets**, introducing **15 new markets**, now **covering more than 99.9% of ACI World Annual Traffic Report (WATR) markets** and a **new demand forecast model** that leverages cutting-edge **machine learning** techniques.

The WATF 2025–2054 explains its demand forecasting methodology and transparently reports past **forecasting accuracy**. In the previous edition, the error for global passenger traffic in 2024 was 0.02%, while regional forecasts averaged a 1.6% error.

Beyond the projections, the report provides airport planners and investors with detailed **analyses of traffic trends**, **growth contributions**, **market shares**, **regional divergence**, and other structural factors shaping **long-term demand**, supporting informed, data-driven decision-making.

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