

Air cargo demand continues to ascend in August

The demand for air cargo increased by 4.1% in August, data released this week by the International Air Transport Association (IATA) has revealed. This marks the sixth consecutive month of year-on-year growth.



Image source: onlyyouj from [Freepik](#)

The IATA report for August 2025 global air cargo markets shows:

- Total demand, measured in cargo tonne-kilometers (CTK), rose by 4.1% compared to August 2024 levels (+5.1% for international operations).
- Capacity, measured in available cargo tonne-kilometers (ACTK), increased by 3.7% compared to August 2024 (+5.5% for international operations).

"Volumes continue to grow even as global trade patterns change," noted Willie Walsh, IATA's director general. "Air cargo has benefitted from a shift from sea for some high value goods as shippers try to minimise the risk of tariff changes.

"And growth patterns indicate some being diverted away from North America, fueling stronger growth for the Europe-Asia, Within Asia, Africa-Asia, and Middle East-Asia trade lanes. This adaptability is vital as shippers navigate the evolving landscape of US tariff policy."



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1 Sep 2025

Several factors in the operating environment should be noted:

- The global goods trade grew by 5.4% year-on-year in July.
- Jet fuel prices in August were 6.4% lower year-on-year, marking the 14th consecutive month of year-on-year declines.
- Global manufacturing in August showed rising optimism in manufacturing PMI, with a rebound to 51.7 the strongest reading since June 2024. Sentiment on new export orders, however, remains below 50 48.73, reflecting persistent caution amid tariff uncertainty.

Air cargo market in detail - August 2025

	World share, % [†]	August 2025 (year-on-year, %)			
		CTK	ACTK	CLF (%-pt)	CLF (level)
Europe	21.4	3.2	4.2	-0.5	49.2
Latin America and Caribbean	2.9	2.1	5.0	-1.0	35.1
Middle East	13.6	2.7	4.3	-0.7	44.1
North America	25.8	-2.1	-1.0	-0.4	38.4

[†]% of industry CTK in 2024

August regional performance

- **Asia-Pacific airlines** saw a 9.8% year-on-year growth in air cargo demand in August. Capacity increased by 6.9% year-on-year.
- **North American carriers** saw a 2.1% year-on-year decrease in growth for air cargo in August, the slowest growth of all regions. Capacity decreased by 1.0% year-on-year.
- **European carriers** saw a 3.2% year-on-year increase in demand for air cargo in August. Capacity increased 4.2% year-on-year.
- **Middle Eastern carriers** saw a 2.7% year-on-year increase in demand for air cargo in August. Capacity increased by 4.3% year-on-year.
- **Latin American carriers** saw a 2.1% year-on-year increase in demand for air cargo in August. Capacity increased by 5.0% year-on-year.
- **African airlines** saw a 11.0% year-on-year increase in demand for air cargo in August, the strongest rise of all regions. Capacity increased by 12.3% year-on-year.



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4 Aug 2025

Trade lane growth

Air freight volumes in August 2025 increased significantly across most major trade corridors. Europe–Asia and Within Asia posted robust double-digit growth, while Middle East–Asia, North America–Europe, and Africa–Asia also saw notable gains. In contrast, Asia–North America, Middle East–Europe and Within Euro recorded declines.

Trade Lane	YOY Growth	Notes	Market Share of Industry
Asia-North America	-2.2%	4 consecutive months of decline	24.4%
Europe-Asia	+13.0%	30 consecutive months of growth	20.5%
Middle East-Europe	-0.8%	1 month of decline	5.7%

Middle East-Asia	+7.8%	6 consecutive months of growth	7.4%
Within Asia	+12.4%	22 consecutive months of growth	7.0%
Within Europe	-0.9%	1 month of decline	2.0%
North America- Europe	+7.8%	19 consecutive months of growth	13.3%
Africa-Asia	+8.4%	2 consecutive months of growth	1.4%

*Share is based on full-year 2024 CTKs.

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