



# ACI World Airport Traffic Forecasts 2023–2052

AIR TRAFFIC FORECASTS AT GLOBAL, REGIONAL, AND COUNTRY LEVELS



EXECUTIVE SUMMARY



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# Key highlights

In 2023\*, global passenger traffic is expected to increase by 31% compared to the previous year, reaching 8.7 billion passengers, or 95% of the 2019 level.

By the end of 2024, global passenger traffic is expected to reach 9.7 billion, surpassing the 2019 level for the first time since the COVID-19 pandemic.

Global passenger traffic is projected to grow at a compound annual growth rate (CAGR) of 4.3% from 2023 to 2042, and 3.6% from 2023 to 2052.

Global passenger numbers are forecasted to approximately double from 2024 to 2042 and to be 2.5 times higher in 2052.

Recovery in 2023 and 2024 will be led by the international passenger market, which is expected to grow by 42% in 2023 and 14% in 2024, while domestic passenger traffic is projected to increase by 25% in 2023 and 10% in 2024.

By 2024, international passenger traffic is forecasted to approach the 4 billion mark, with domestic passenger traffic reaching 5.7 billion. Looking ahead to 2042, international passenger traffic is expected to reach 8.7 billion and domestic passenger traffic to attain 10.6 billion.

Following its peak at 125.3 million metric tonnes in 2021, global air cargo saw a decline to 116.9 million metric tonnes in 2022 and is expected to further drop to 110.8 million metric tonnes in 2023. While there remains a pessimistic perspective in macroeconomics, cargo volume is expected to rise to 117.1 million metric tonnes in 2024, albeit with downside risks.

Aircraft movements are expected to reach 98.2 million in 2023 and 106.7 million in 2024. Airports worldwide will see 178.1 million aircraft movements by 2042, and 209.2 million by 2052.

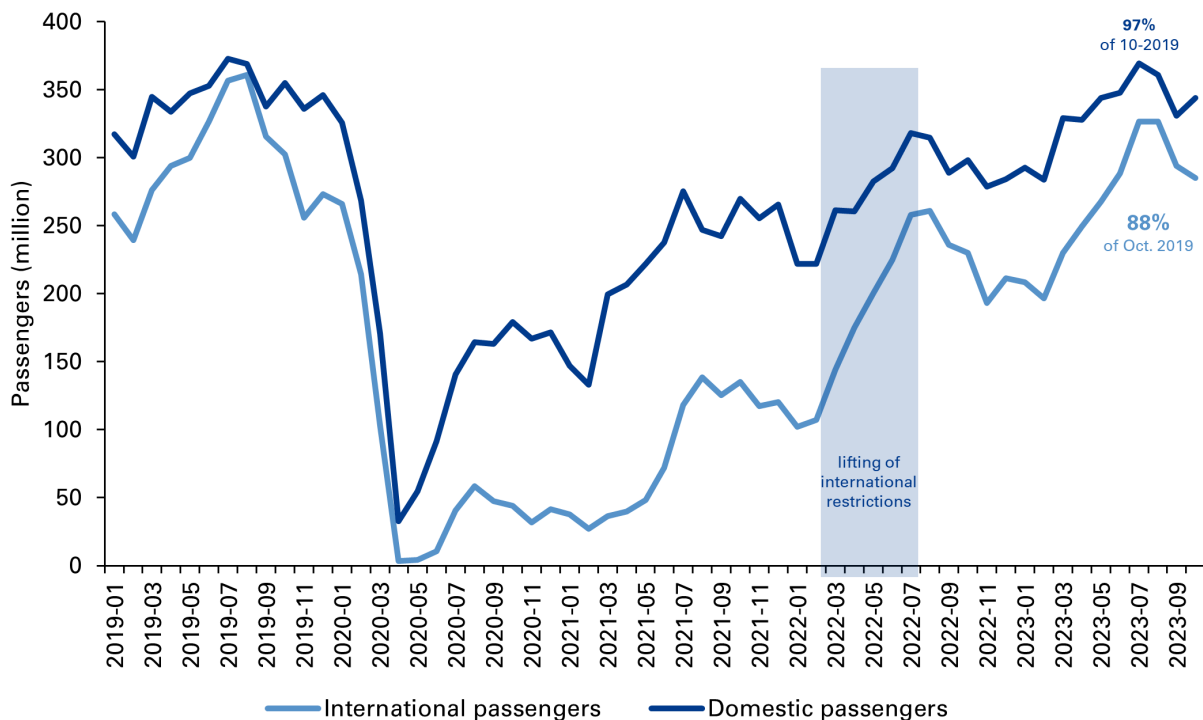
*\*2023 air traffic figures are confirmed by ACI World in July 2024.*

# Short- and medium-term outlook

Despite the uncertainties ahead, global passenger traffic in 2024 is predicted to surpass the 2019 level for the first time since COVID-19, reaching 9.7 billion passengers or 106% of the 2019 level (12% YoY growth rate). The growth rate is expected to gradually decelerate in succeeding years, as more markets recover from the effects of COVID-19.

Macroeconomic factors, such as high global inflation, slowdown of global GDP, pessimistic business confidence levels, and geopolitical conflicts pose significant risks and uncertainties in future projections.

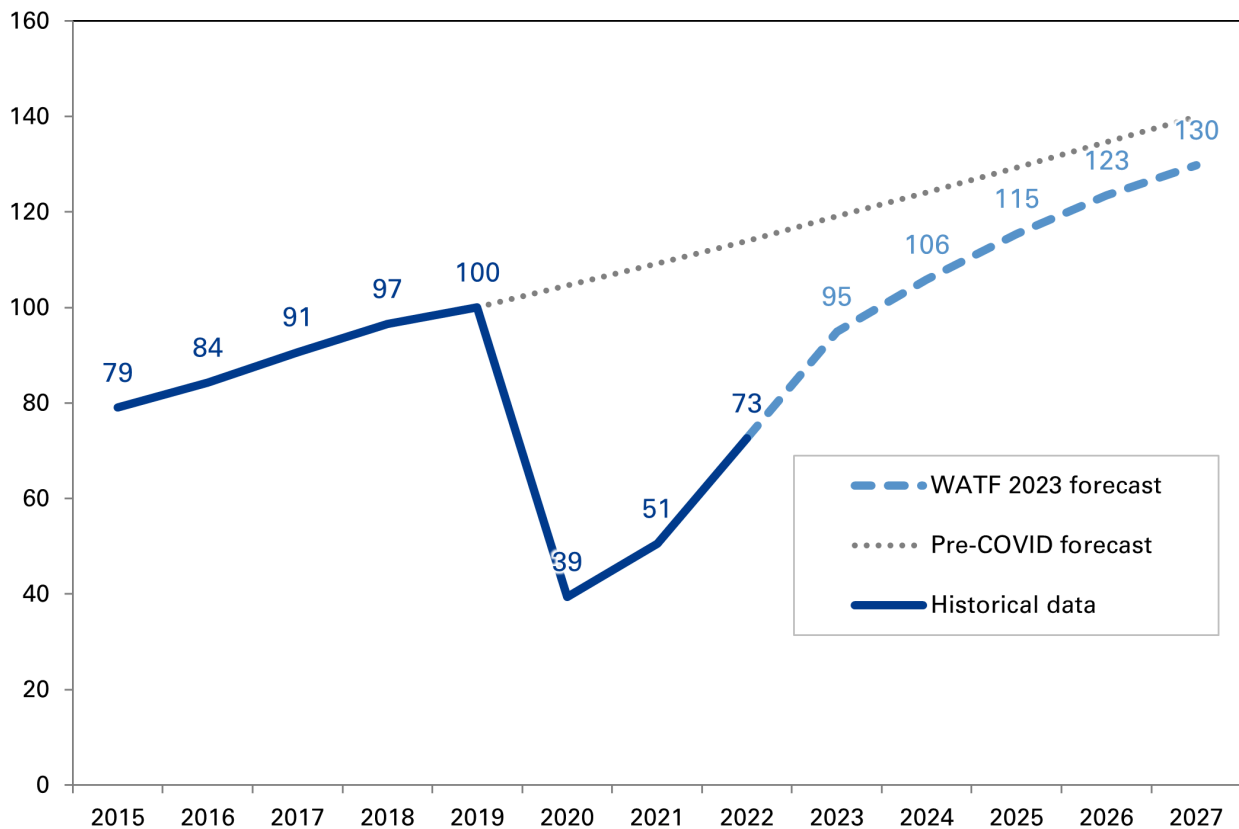
## Monthly global domestic and international passenger traffic 2019–2023



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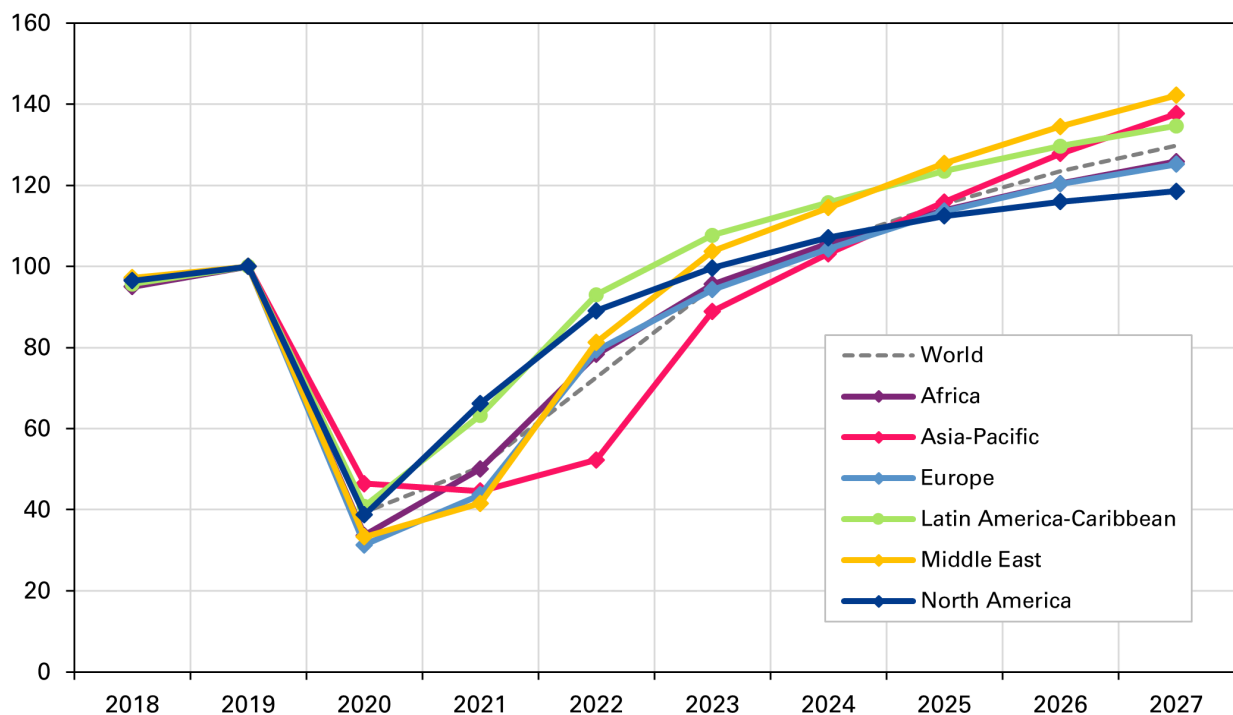
By October 2023 year-to-date (YTD), total passenger traffic rose by 28% year-on-year (YoY), reaching 93% of the October 2019 YTD level. While the domestic market grew by 21% YoY (or 97% of the 2019 level), the international market drove recovery with 38% YoY, reaching 88% of the 2019 level.

### Medium-term global passenger traffic forecast (indexed, 2019 = 100)



Before the COVID-19 pandemic, global passenger volume was estimated to reach 10.5 billion passengers in 2023, or 119% of the 2019 level. The current projection of global passenger volume in 2023 is approximately 8.7 billion passengers, which is 95% of the 2019 level, or 31% YoY growth from the 2022 volume.

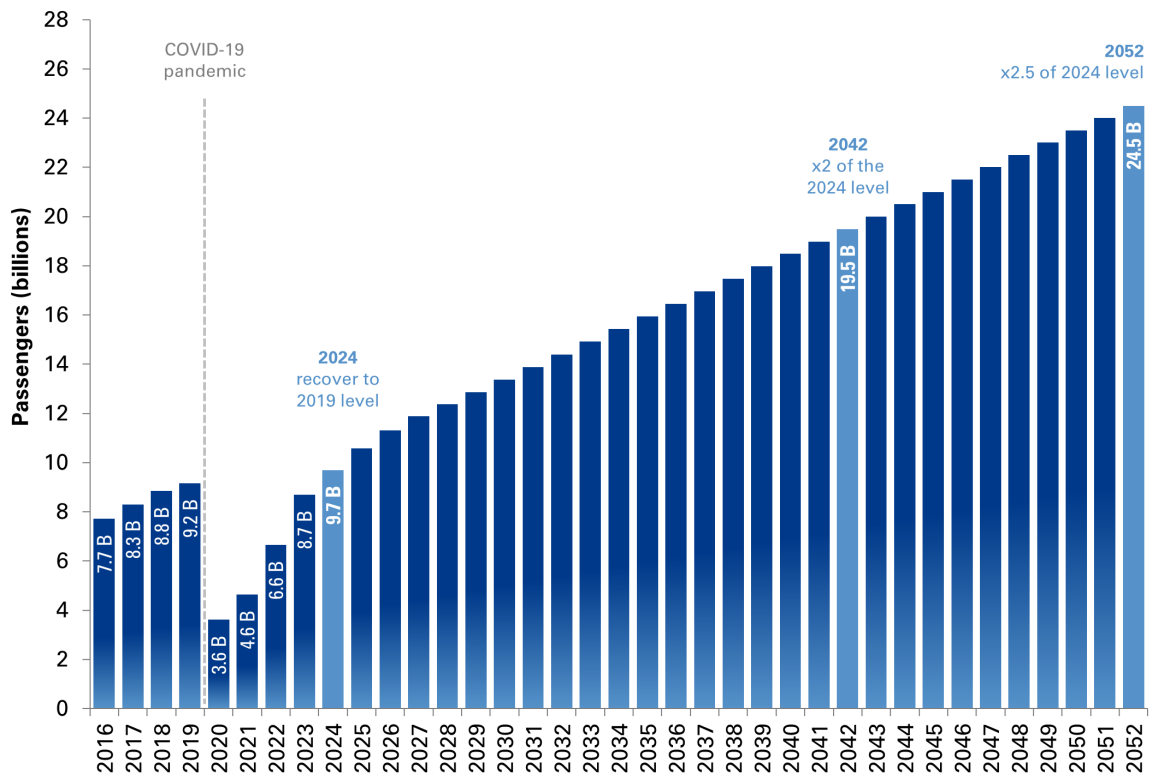
### Medium-term passenger traffic forecast by regions (indexed, 2019 = 100)



In 2023, Latin America-Caribbean, Middle East, and North America are expected to reach passenger traffic of 108%, 104%, and 100% of their 2019 levels respectively. Africa and Europe are predicted to be at 96% and 94% of their 2019 levels, close to the world average of 95%. Although Asia-Pacific showed the biggest increase, from 52% in 2022 to 89% in 2023, the region is still behind other regions. This is largely due to the fact that major markets in the Asia-Pacific region opened late compared to those in other regions.

# Long-term outlook

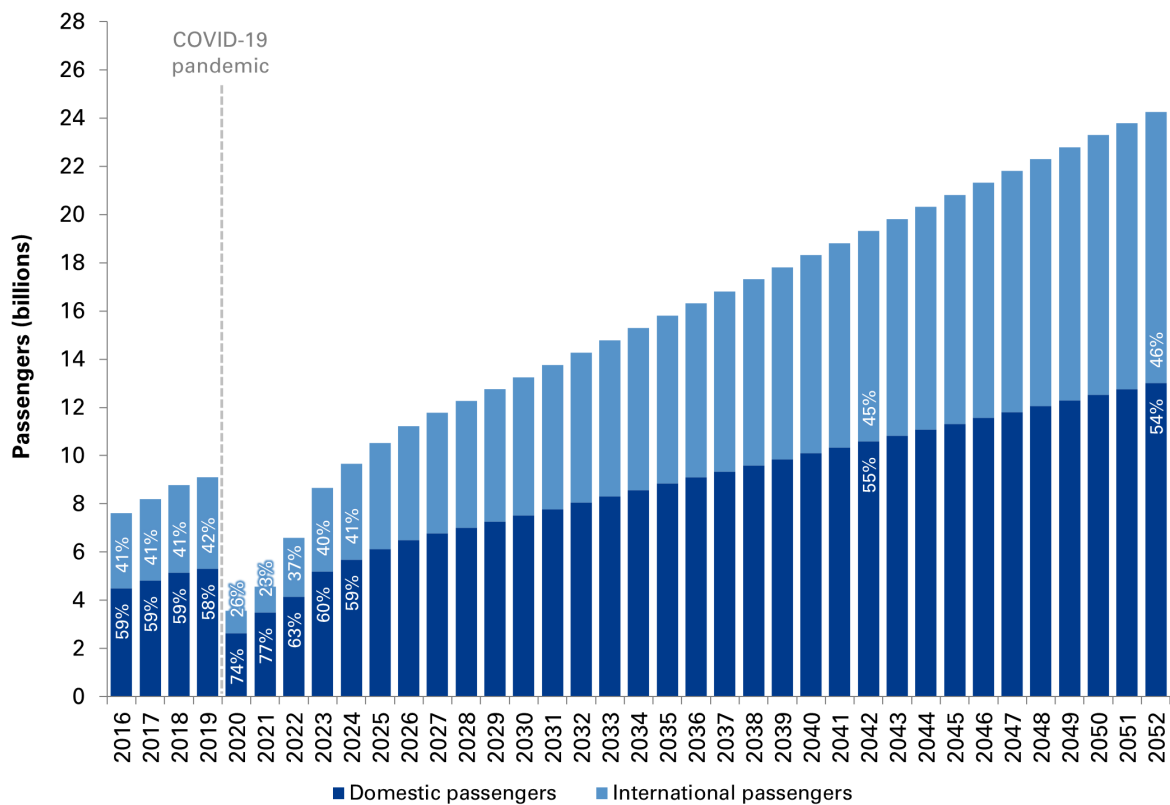
### Long-term global passenger traffic forecast 2016–2052



From 2023 to 2042, total passenger traffic worldwide is predicted to grow at CAGR of 4.3%, with a steep recovery gradient observed in the first 3 years (9.1% CAGR for 2023 to 2026), then converging to the pre-COVID-19 growth rate (3.6% CAGR for 2023 to 2052). Global passenger traffic is expected to reach nearly 20 billion in 2042, double the 2024 projection. In 2052, global passenger traffic is expected to reach close to 25 billion, approximately 2.5 times the 2024 projection.

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### Long-term international and domestic passenger traffic 2016–2052



At the beginning of the COVID-19 pandemic, the international passenger market had more impact than the domestic passenger market due to international travel restrictions. The international passenger market has recovered significantly in 2023, expected to reach 3.5 billion with 42% YoY growth. In 2024, international passenger traffic is forecasted to be 4 billion with 14% YoY growth. Domestic passenger traffic is forecasted to be 5.2 billion in 2023 with 25% YoY growth, then slowing down to 5.7 billion in 2024 with 10% YoY growth.

Comparing long-term CAGRs, international passenger traffic is expected to steadily grow with a 5% CAGR between 2023 and 2042, while domestic passenger traffic is expected to have a 3.8% CAGR in the same period. In 2042, 45% of all passengers are projected to come from the international segment and 46% by 2052.

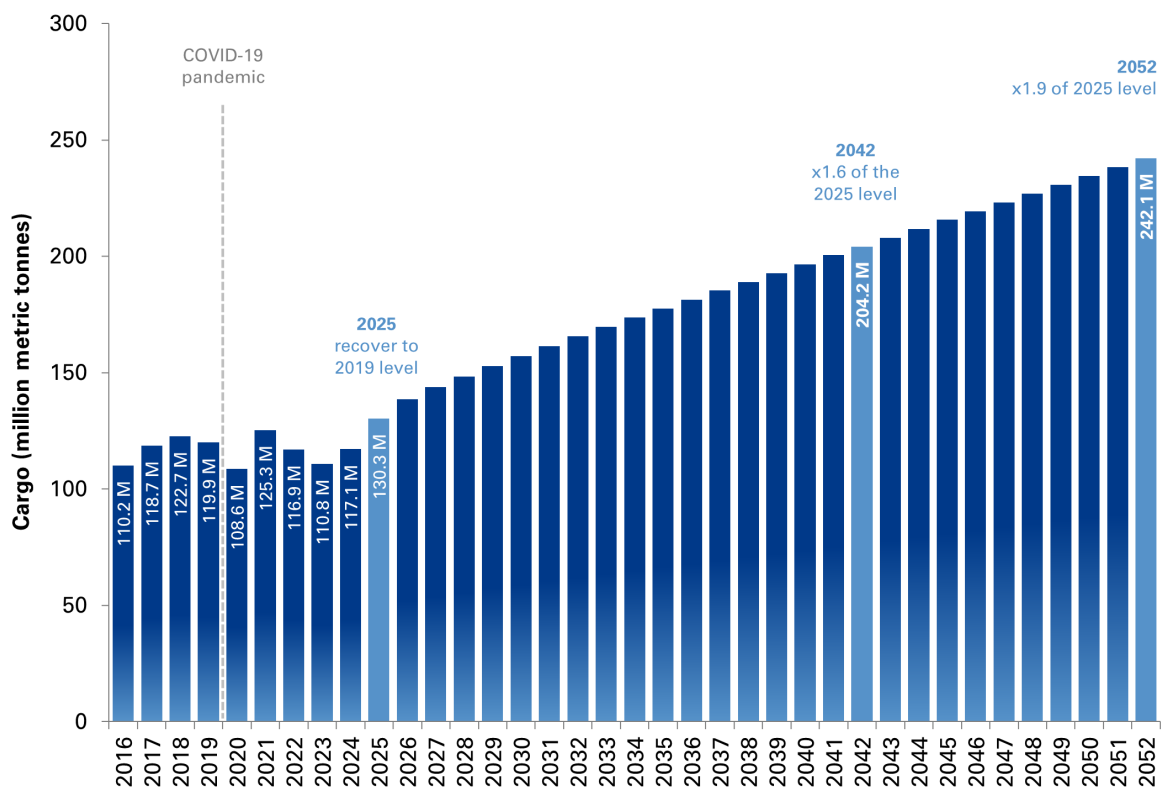
# Top-20 markets by total passenger traffic forecast

Rank	2023	2042	2052
1	United States	China	China
2	China	United States	United States
3	India	India	India
4	Spain	Indonesia	Indonesia
5	United Kingdom	Spain	Spain
6	Japan	Japan	Turkey
7	Turkey	Turkey	Japan
8	Brazil	United Kingdom	United Kingdom
9	Italy	Russian Federation	Thailand
10	Germany	Thailand	Vietnam
11	Mexico	Vietnam	Mexico
12	France	Mexico	Russian Federation
13	Indonesia	Brazil	Brazil
14	Russian Federation	Italy	Philippines
15	Canada	Germany	Italy
16	Australia	Korea	Korea
17	Korea	France	Australia
18	United Arab Emirates	Australia	Germany
19	Thailand	Philippines	France
20	Vietnam	United Arab Emirates	United Arab Emirates

In the long-term, the global passenger market dynamic is expected to shift, transitioning from advanced economies towards emerging and developing economies. Between 2023 and 2042, advanced economies are expected to have a CAGR of 3.2% for total passenger traffic, whereas emerging and developing economies are expected to have a more robust CAGR of 5.4%. Consequently, these dynamics would lead to changes in the composition of the top 20 passenger markets, with countries in the Asia-Pacific region gaining a more visible presence.

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### Long-term global air cargo forecast 2016–2052



The air cargo market is expected to mark 111 million metric tonnes in 2023, which is a 5% reduction from the 2022 volume. In the year 2024, global air cargo is expected to increase to 117 million metric tonnes with a 6% YoY growth rate. In the long-term, global air cargo volume is expected to grow by 3.3% CAGR between 2023 and 2042, and 2.7% CAGR between 2023 and 2052.



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