

XENETA

TIACA Summary on the general air cargo market
July 2025

Global summary of the general air freight market July 2025

Region	Dynamic loadfactor		
	Jul '25 <i>Abs. in %</i>	vs Jul '24 <i>Change in p.pts</i>	vs Jun '25 <i>Change in p.pts</i>
Global	58%	+ 0.1%	+ 0.9%
Outbound:			
- Asia Pacific	74%	- 1.4%	- 0.2%
- North America	47%	+ 0.6%	- 0.4%
- Europe	60%	+ 0.2%	+ 3.5%
- Middle East & Central Asia	58%	- 0.3%	+ 1.2%
- Latin America	56%	+ 0.7%	- 0.9%
- Africa	44%	- 0.7%	- 0.3%

Global lane developments of the general air freight market July 2025

North America		
To	DLF	vs '24
EU	38 %	+ 1.1%
ME	55 %	+ 3.9%
AP	46 %	+ 2.4%
LA	71 %	+ 2.3%

Europe		
To	DLF	vs '24
AP*	59 %	- 0.2%
ME	58 %	+ 0.4%
NA	62 %	+ 0.7%
LA	66 %	+ 2.9%

Asia Pacific		
To	DLF	vs '24
EU*	82 %	- 3.3%
ME	81 %	- 5.2%
NA	84 %	+ 0.2%

Latin America		
To	DLF	vs '24
NA	72 %	- 2.2%
EU	48 %	+ 0.8%

Africa		
To	DLF	vs '24
ME	43 %	+ 1.5%
EU*	49 %	- 0.3%

Middle East & C. Asia		
To	DLF	vs '24
EU	75 %	- 1.5%
AP	35 %	- 0.8%
NA	70 %	- 7.9%
AF	71 %	+ 3.4%

Year-over-year (YoY) percentage points difference:

>-5%

<-5%

<+5%

>+5%

*The dynamic loadfactor and capacity analyses for these lanes also include the flights between Asia Pacific/Africa and Middle East

Notes: Dynamic loadfactor (DLF) is in absolute percentage and Year over year growth (YoY) is based on the change in percentage points

Source: XENETA