

**FRANCE AVIATION
CIVILE SERVICES**



AIR TRANSPORT

DATA BULLETIN

JANUARY 2026

**MAIN TRAFFIC
FLOWS
USA-WORLD
IN 2024**

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3 WORD OF THE DIRECTOR



So here is a **new year** beginning! Like every year, it will bring opportunity for new developments, new friendships and new adventures!

But let's go back to **2025** for a moment. It was a contrasted year with a difficult start due to obstacles encountered in the project to support the transition to radar control in Haiti and the security situation in that country. Nevertheless, we were able to overcome these difficulties, diversify ourselves and move forward. Our study on the development and operationalization of RSOOs (Regional Safety Oversight Organizations) in the AFI region was appreciated and concluded with a workshop bringing together all African countries in Kampala at the end of April 2025. We continued our activities in Luxembourg as well as the development of DIADEME, which is now able to offer web-based simulation on degraded situations and procedural control, and we have made some progress in our environmental analysis capabilities.

In a turbulent global context, the Paris Air Show was very focused on defense but was also a successful event for us with great meetings and increased cooperation with the DGAC/MCI team. The ICAO Assembly, although marked by global tensions, was also a success with 193 countries represented and many breakthroughs. For FRACS, this triennial event is a way to meet the entire world of aviation, to address its key issues and to forge many relationships. This was again the case at the 2025 Assembly.

Finally, and this should be noted, 2025 marks the return of global air traffic to pre-pandemic levels. We continued to observe this trend and to develop new analytical capabilities.

So, what does 2026 hold for us?

We will naturally continue to build on our momentum and develop our offer by continuing to focus on innovative services and products that can meet the challenges of operators and civil aviation authorities around the world.

We concluded the year 2025 with the signing of a cooperation agreement with ASECNA and a workshop with all its components, I have no doubt that 2026 will make it possible to materialize and initiate many projects with ASECNA. We also hope to engage in strong cooperation with Mauritius on several axes after winning, in partnership with Hilyrd, the project to support the implementation of the APOC in La Réunion.

2026 should also be synonymous with new developments in our inspection and calibration capabilities using drones and we are continuing our investigations in this area.

We naturally continue to invest alongside the Civil Aviation Safety Oversight Authorities with METEOR. The year 2025 saw the advent of the new version of ASERT (Aviation Safety Event Reporting Tool) and we hope in 2026 to develop the many possibilities of this tool in particular in support of safety management processes.

In the field of Air Transport, we continue to move forward and increase the coverage of our services. We are also working on modernizing our data collection methods across the globe and 2026 should see the practical realization of ongoing developments.

Finally, 2026 should allow us to conclude an ambitious project in Pakistan, in partnership with CGX Aero, on the implementation of RNP-AR procedures at isolated airports on the borders of the Himalayas.

So 2026 is a challenging year ahead of us and we are approaching it with the enthusiasm and energy that characterize our small team and experts. Our team has evolved a lot in 2025 due to the aspiration of some colleagues towards major companies in the French aeronautical industry and new faces will make up the 2026 team but still with the same dynamic and, as always, we hope to carry our colours, our energy and the know-how of French civil aviation to new horizons.

In conclusion, I would like to thank all those who have been by our side this year, our customers who have placed their trust in us, the entire FRACS team, the experts in the projects, our partners, the services of the DGAC and the ENAC who support us on a daily basis and make a great contribution, as well as the students we have continued to welcome.

The entire **France Aviation Civile Services** team joins me in wishing you and all yours an excellent year 2026 in good health and with many sources of satisfactions both personally and professionally. In any case, we hope to cross your path for a moment of warm and constructive cooperation.





MAIN TRAFFIC FLOWS BETWEEN THE USA AND THE REST OF THE WORLD IN 2024

In this quarterly publication, you will find facts and figures about the civil aviation industry based on data extracted from our air transport databases.

This quarter, you will find:

- Main airlines Q3 2025 traffic results with 2025/2024 comparison
- Top 50 airports by number of passengers carried in Q3 2025
- Main traffic flows in 2025 (city-pairs) between the United States and the rest of the World by regions
- Airliners Q3 2025 orders and deliveries with 2025/2024 evolution

We wish you a pleasant reading!

Every question or suggestion related to this publication or our services is welcome at:

atd@fracs.aero

If you have missed the last report, please click on the following link:

[Main traffic flows between Europe and the rest of the World in 2024](#)

Summary

1 - Main Airlines' traffic Q3 2025

2 -Main Airports' traffic Q3 2025

3 - Main traffic flows between US - World by region

NORTH
AMERICA

AFRICA &
MIDDLE-EAST

LATIN AMERICA
& CARIBBEAN

ASIA-PACIFIC

EUROPE

5 - Airliners' Orders and Deliveries Q3 2025

6 - Our Databases and Services



5 MAIN AIRLINES' TRAFFIC - Q3 2025

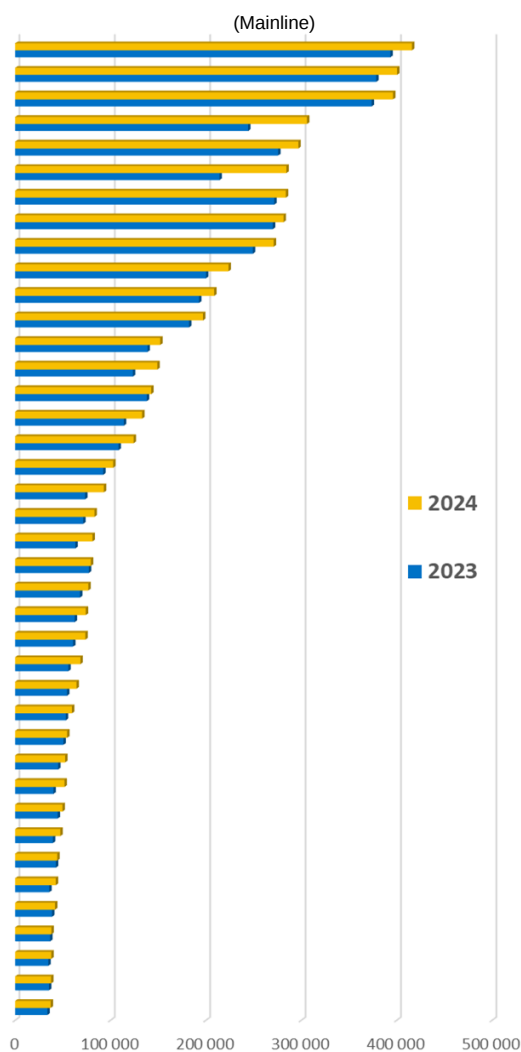
For the third quarter of 2025, the trend remains positive, with a large majority of airlines posting figures above their statistics from the previous year. Alaska Airlines records the strongest growth margin (+38.7%) in the ranking, followed by Cathay Pacific (+28.8%), whose traffic increase is confirmed during the first months of the last quarter of 2025.

In the opposite dynamic, a slight decline in traffic can be observed for the Taiwanese airline EVA Air (-7.5%), as well as a sharp drop for Spirit Airlines, which is still facing liquidation.

Rank 2024	AIRLINES	RPK ¹ (millions) 2024	RPK1 (millions) 2023	24/23 (%)	Q1 25/24 (%)	Q2 25/24 (%)	Q3 25/24 (%)	Oct. 25/24 (%)	Nov. 25/24 (%)
1	UNITED HOLDING	416,019	393,379	5,8	3,6	4,5	6,1	-	-
2	AMERICAN AL GROUP	400,396	378,568	5,8	-1,9	0,9	1,6	-	-
3	DELTA AIR LINES GROUP	396,131	373,755	6,0	2,7	1,8	1,9	-	-
4	CHINA SOUTHERN AIR HOLD.	305,976	244,226	25,3	7,9	9,1	6,2	8,8	10,4
5	INTL AL GROUP (IAG)	296,877	275,727	7,7	2,6	0,7	1,2	-	-
6	AIR CHINA GROUP	284,332	214,174	32,8	3,5	7,0	3,6	8,7	10,1
7	EMIRATES AL	283,731*	271,601	4,5	-	-	-	-	-
8	AIR FRANCE/KLM	281,381	270,135	4,2	3,4	4,3	4,5	-	-
9	LUFTHANSA GROUP	271,038	249,157	8,8	3,3	3,5	3,7	-	-
10	QATAR AW	223,696	200,088	11,8	0,5	-	-	-	-
11	TURKISH AL/THY	208,663	192,828	8,2	4,5	8,2	3,4	0,1	13,8
12	CHINA EASTERN AL	196,958	182,295	8,0	10,9	13,6	8,9	-	-
13	SINGAPORE INT'L GROUP	152,101	138,760	9,6	2,8	4,1	5,1	5,3	2,6
14	AEROFLOT RUSSIAN GROUP	149,074	123,421	20,8	2,2	4,9	0,6	5,1	8,2
15	AIR CANADA GROUP	142,657	138,085	3,3	-3,1	1,5	-2,6	-	-
16	LATAM AL GROUP	133,137	113,993	16,8	5,7	9,9	10,0	7,2	3,6
17	QANTAS GROUP	124,243	108,360	14,7	-	-	-	-	-
18	ALASKA AIR GROUP	102,790	92,313	11,3	37,8	31,8	38,7	-	-
19	CATHAY PACIFIC	93,016	73,340	26,8	26,0	34,0	28,8	30,4	27,0
20	SAUDIA	83,164	71,324	16,6	-	-	-	-	-
21	ETIHAD AW	81,058	63,129	28,4	-	-	-	-	-
22	ALL NIPPON AW GROUP	79,371	77,252	2,7	6,0	8,9	7,8	17,5	9,9
23	KOREAN AIR/KAL	76,666	68,054	12,7	4,3	-0,3	0,5	-	-
24	JAPAN AL	74,002	62,452	18,5	15,3	12,5	9,6	8,5	5,1
25	AIR INDIA	73,588	60,714	21,2	39,0	22,8	6,3	11,6	-
26	HAINAN AL	68,400	55,753	22,7	-	-	-	-	-
27	SICHUAN AL	64,307	54,368	18,3	-	-	-	-	-
28	ETHIOPIAN AL	59,492	53,088	12,1	-	-	-	-	-
29	EVA AIR	54,478	50,620	7,6	-1,2	-2,3	-7,5	0,0	-1,5
30	AVIANCA HOLD.	52,419	45,070	16,3	6,8	10,2	7,0	-	-
31	THAI AW	51,740	40,083	29,1	20,8	15,6	4,0	3,1	-
32	AEROMEXICO GROUP	49,645	44,624	11,3	-1,3	1,5	-1,7	3,7	-3,6
33	JUNEYAO AIR	47,397	39,533	19,9	5,0	0,5	-0,5	5,5	-8,4
34	TAP AIR PORTUGAL	44,135	42,667	3,4	-1,1	7,8	6,2	-	-
35	ASIANA	42,607	35,777	19,1	8,3	1,2	-1,9	-	-
36	COPA AL	41,788	38,706	8,0	10,0	6,4	8,0	9,3	-
37	TUI AW	38,026	36,670	3,7	1,9	27,5	-1,8	-26,3	-
38	VIRGIN ATLANTIC	37,921	34,748	9,1	7,7	1,9	-0,7	-1,8	-
39	AZUL LINHAS AEREAS	37,718	35,400	6,5	19,4	19,3	9,7	-	-
40	CHINA AL	37,267	33,808	10,2	-0,8	0,6	-4,9	22,2	-3,3

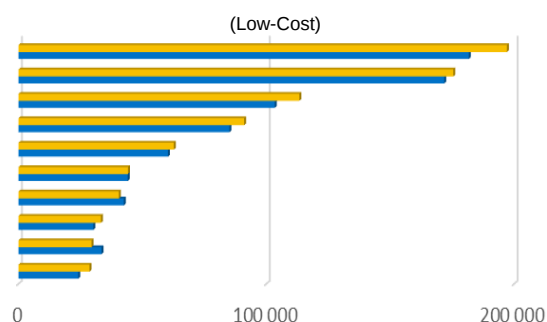
*Année fiscale

Top Compagnies par PKT - 2024/23



Rank 2024	AIRLINES (low-cost)	PAX ² (000 ²) 2024	PAX2 (000 ²) 2023	24/23 (%)	Q1 25/24 (%)	Q2 25/24 (%)	Q3 25/24 (%)	Oct. 25/24 (%)	Nov. 25/24 (%)
1	RYANAIR	197,100	181,740	8,5	11,1	4,1	2,2	4,9	6,2
2	SOUTHWEST AL	175,469	171,817	2,1	-9,2	-6,1	-2,0	-	-
3	INDIGO AL	113,367	103,405	9,6	18,9	11,6	3,6	8,2	-
4	EASYJET AL	91,077	85,115	7,0	8,3	2,2	1,5	-	-
5	WIZZ AIR	62,686	60,314	3,9	5,1	10,6	9,0	13,1	8,6
6	SPIRIT AL	44,180	44,105	0,2	-19,0	-18,9	-29,3	-	-
7	JETBLUE AW	40,526	42,535	-4,7	-3,3	-3,9	-2,0	-	-
8	FRONTIER AL	33,296	30,218	10,2	12,2	-4,2	-0,4	-	-
9	VOLARIS	29,473	33,497	-12,0	7,2	-2,4	-0,5	7,5	4,9
10	SPRING AL	28,680	24,133	18,8	5,7	2,9	2,1	4,4	-12,4

Top Compagnies par PAX - 2024/23



¹ Passagers-kilomètres transportés

² Passagers transportés

Sources : FRACS Air transport data



6 MAIN AIRPORTS' TRAFFIC - Q3 2025

During the third quarter of 2025, the momentum observed in the spring is confirmed, with regional trajectories remaining contrasted. Asian airports continue their upward trend, posting figures above last year's statistics, notably Hong Kong (+11.7% compared with Q3 2024) as well as major Chinese airports such as Shanghai Pudong (+7.9%), Guangzhou (+7.0%), and Beijing Capital (+3.2%). By contrast, Delhi records a sharp decline in traffic (-7.5%), confirming the slight downturn seen in the previous quarter, following large-scale cancellations on the IndiGo side.

Conversely, North American traffic remains either down or stagnant, while Europe shows signs of traffic consolidation. Accordingly, major U.S. hubs such as Dallas/Fort Worth (-3.9%), Los Angeles (-4.0%), and Charlotte (-7.5%) see their traffic decline, whereas airports in Istanbul (+5.5%), Madrid (+1.6%), and Amsterdam (+2.8%) are performing well.

Rank 2024	Rank Var.	Code IATA	AIRPORTS	REGION	PAX (000) 2024	24/19 (%)	24/23 (%)	Q1 25/24 (%)	Q2 25/24 (%)	Q3 25/24 (%)	Oct. 25/24 (%)	Nov. 25/24 (%)
1	0	ATL	ATLANTA, GEORGIA, USA	NORTH AMERICA	108,068	-2,2	3,3	-1,3	-2,9	1,2	0,0	-6,5
2	0	DXB	DUBAI, U. A. EMIRATES	AFRICA & MIDDLE EAST	92,300	6,8	6,1	1,5	3,1	1,9	6,5	-
3	0	DFW	DALLAS/FT. WORTH, TEXAS-LOVE, USA	NORTH AMERICA	87,818	17,0	7,4	-1,3	-1,8	-3,9	-2,9	-4,4
4	1	HND	TOKYO-HANEDA, JAPAN	ASIA PACIFIC	84,967	-0,6	8,5	10,4	8,2	4,6	3,0	1,9
5	-1	LHR	LONDON-HEATHROW, ENGLAND UK	EUROPE	83,860	3,7	5,9	-1,5	1,6	0,5	2,1	2,0
6	0	DEN	DENVER, COLORADO, USA	NORTH AMERICA	82,359	19,3	5,8	-0,4	-1,9	1,6	3,7	0,4
7	0	IST	ISTANBUL, TURKEY	EUROPE	80,456	54,8	5,8	1,6	3,3	5,5	11,1	12,6
8	1	ORD	CHICAGO, ILLINOIS-O'HARE, USA	NORTH AMERICA	79,988	-5,2	8,2	4,5	7,4	6,2	17,5	-
9	1	DEL	DELHI, INDIA	ASIA PACIFIC	77,821	13,6	7,8	7,5	-1,2	-7,5	1,2	7,5
10	11	PVG	SHANGHAI-PUDONG, P. R. CHINA	ASIA PACIFIC	76,790	0,8	41,0	11,2	12,0	7,9	12,5	15,5
11	-3	LAX	LOS ANGELES, CALIFORNIA-INTL, USA	NORTH AMERICA	76,586	-13,1	2,0	-4,7	-2,8	-4,0	-3,4	-3,8
12	0	CAN	GUANGZHOU-BAIYUN, P. R. CHINA	ASIA PACIFIC	76,365	4,0	20,9	2,3	17,1	7,0	12,0	12,6
13	7	ICN	SEOUL-INCHEON, REPUBLIC OF KOREA	ASIA PACIFIC	71,157	0,0	26,8	7,8	4,3	2,1	3,0	-
14	-3	CDG	PARIS-DE GAULLE, FRANCE	EUROPE	70,290	-7,7	4,3	5,6	3,1	0,8	-0,5	2,0
15	2	SIN	SINGAPORE, SINGAPORE	ASIA PACIFIC	67,700	-1,0	14,9	4,3	5,9	3,1	3,4	0,2
16	7	PEK	BEIJING-CAPITAL, P. R. CHINA	ASIA PACIFIC	67,367	-32,6	27,4	2,0	6,9	3,2	7,8	9,0
17	-3	AMS	AMSTERDAM, NETHERLANDS	EUROPE	66,828	-6,8	8,0	3,0	3,1	2,8	3,2	2,8
18	-3	MAD	MADRID, BARAJAS, SPAIN	EUROPE	66,159	7,1	9,9	4,5	1,7	1,6	6,4	4,0
19	-6	JFK	NEW YORK, NEW YORK-KENNEDY, USA	NORTH AMERICA	63,521	1,4	1,7	-0,5	0,3	-0,6	-2,9	-2,4
20	6	BKK	BANGKOK-NEW SUVANNABHU, THAILAND	ASIA PACIFIC	62,235	-4,9	20,4	5,6	-0,5	-2,6	4,1	-1,1
21	-5	FRA	FRANKFURT, GERMANY	EUROPE	61,561	-12,7	3,7	-0,9	3,1	2,6	5,9	4,0
22	2	SZX	SHENZHEN-BAO'AN, P. R. CHINA	ASIA PACIFIC	61,477	16,1	16,6	6,3	16,0	3,1	6,3	-
23	-1	CLT	CHARLOTTE, NORTH CAROLINA, USA	NORTH AMERICA	58,812	17,2	10,0	-7,7	-9,4	-7,5	-8,0	-0,3
24	-5	LAS	LAS VEGAS, NEVADA-MCCARRAN, USA	NORTH AMERICA	58,482	13,1	1,4	-3,6	-3,8	-6,3	-8,3	-9,6
25	-7	MCO	ORLANDO, FLORIDA-INTL, USA	NORTH AMERICA	57,212	13,0	-0,9	-4,0	-1,4	2,8	15,7	-
26	10	KUL	KUALA LUMPUR, MALAYSIA	ASIA PACIFIC	57,106	-7,9	20,9	11,1	8,7	7,7	14,8	-
27	-2	MIA	MIAMI, FLORIDA, USA	NORTH AMERICA	55,927	19,9	6,9	-1,7	-1,1	-2,2	1,3	0,0
28	3	BCN	BARCELONA, SPAIN	EUROPE	55,003	4,1	10,3	3,2	4,9	4,0	5,7	5,2
29	11	TFU	CHENGDU-TIANFU, P. R. CHINA	ASIA PACIFIC	54,906	-	22,6	2,0	4,2	3,5	2,0	2,1
30	-3	BOM	MUMBAI, INDIA	ASIA PACIFIC	54,821	16,5	6,3	2,2	1,2	0,8	4,5	2,4
31	2	CGK	JAKARTA-SOEKARNO-HATTA, INDONESIA	ASIA PACIFIC	54,766	0,5	8,1	8,1	-0,7	-0,1	4,7	-
32	24	HKG	HONG KONG, HONG KONG	ASIA PACIFIC	52,964	-25,7	34,4	15,0	17,9	11,7	18,1	17,2
33	4	DOH	DOHA, QATAR	AFRICA & MIDDLE EAST	52,700	35,9	14,8	-1,4	0,5	4,4	10,2	8,1
34	-5	SEA	SEATTLE/TACOMA, WASHINGTON, USA	NORTH AMERICA	52,638	1,6	3,4	2,0	1,1	-0,6	-1,5	-2,2
35	-1	PHX	PHOENIX, ARIZONA-SKY HARBOR, USA	NORTH AMERICA	52,325	13,0	7,5	-0,7	-0,8	-3,1	-0,5	-3,3
36	-6	SFO	SAN FRANCISCO, CALIFORNIA, USA	NORTH AMERICA	52,211	-8,9	4,1	6,1	8,6	1,8	2,8	1,8
37	2	MNL	MANILA, PHILIPPINES	ASIA PACIFIC	50,356	4,7	11,2	8,4	6,5	-1,1	-1,1	-
38	17	PKX	BEIJING DAXING, P. R. CHINA	ASIA PACIFIC	49,441	-	25,5	-	-	-	-	-
39	5	JED	JEDDAH, SAUDIA ARABIA	AFRICA & MIDDLE EAST	49,072	30,8	14,4	8,9	2,8	5,0	5,2	-
40	12	FCO	ROME-DA VINCI, ITALY	EUROPE	48,879	12,3	20,7	9,4	4,4	1,3	4,9	3,2
41	-9	EWR	NEW YORK, NEW YORK-NEWARK INL, USA	NORTH AMERICA	48,854	5,7	-0,5	-0,8	-12,7	-1,0	-0,2	-1,7
42	-1	CKG	CHONGQING-JIANGBEI, P. R. CHINA	ASIA PACIFIC	48,677	8,7	9,0	3,7	4,1	1,7	1,7	-1,3
43	-5	IAH	HOUSTON, TEXAS-INTERCONT, USA	NORTH AMERICA	48,449	7,7	4,9	0,4	-2,0	-0,2	-0,5	-2,1
44	9	HGH	HANGZHOU, P. R. CHINA	ASIA PACIFIC	48,054	19,8	16,7	2,1	7,1	3,2	5,9	8,7
45	0	SHA	SHANGHAI-HONGQIAO, P. R. CHINA	ASIA PACIFIC	47,944	5,0	12,8	2,2	7,3	3,8	5,7	4,7
46	0	KMG	KUNMING-WUJIABA, P. R. CHINA	ASIA PACIFIC	47,178	-1,9	12,2	2,0	6,1	6,5	6,1	-
47	0	XIY	XI AN-XIANYANG, P. R. CHINA	ASIA PACIFIC	47,030	-0,4	13,7	-	-	-	-	-
48	-5	YYZ	TORONTO, ONTARIO-PEARSON, CANADA	NORTH AMERICA	46,622	-7,3	4,2	-2,1	1,5	1,1	3,2	0,4
49	5	BOG	BOGOTA, COLOMBIA	LATIN AMERICA & CARIBBEAN	45,798	32,2	16,0	-1,3	-1,3	-0,5	-1,0	-0,3
50	-15	MEX	MEXICO CITY, MEXICO	LATIN AMERICA & CARIBBEAN	45,359	-9,8	-6,2	-3,6	-2,4	-1,8	0,8	1,7

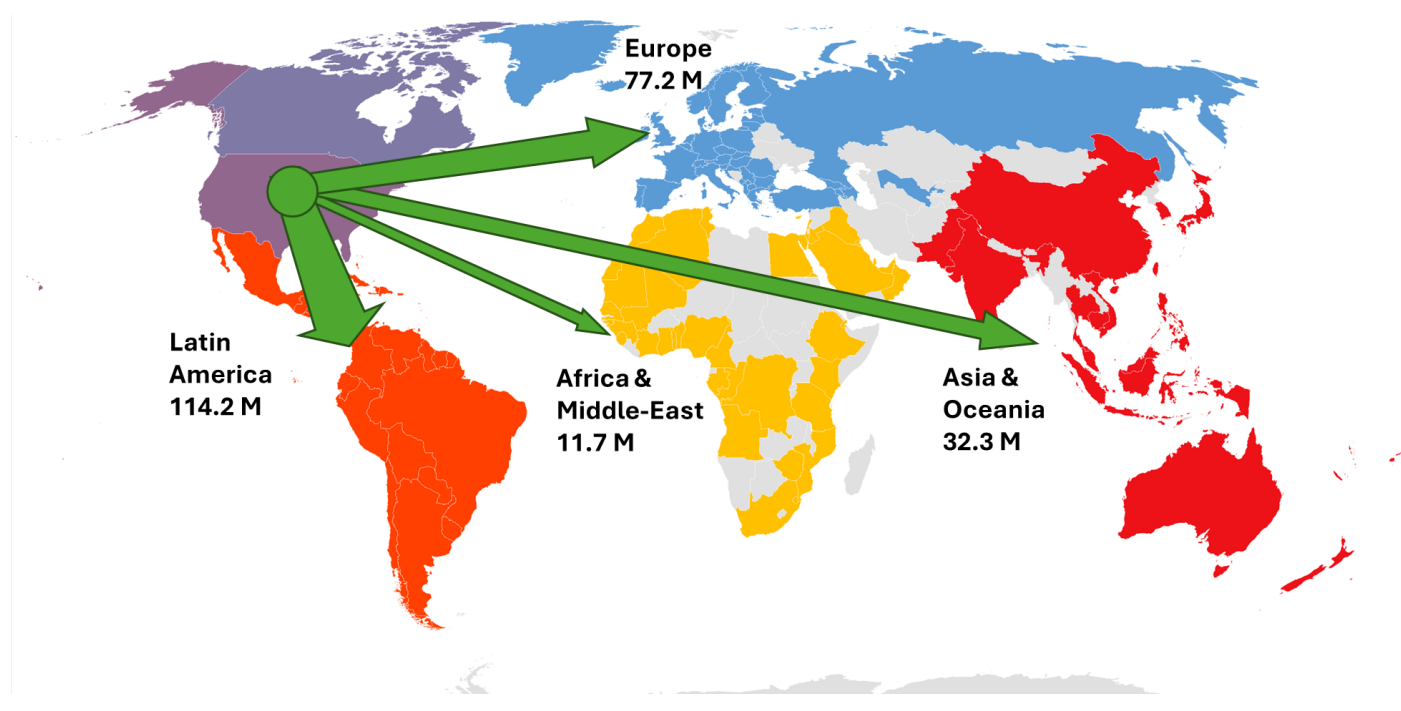


7 MAIN TRAFFIC FLOWS USA -WORLD BY REGION IN 2024

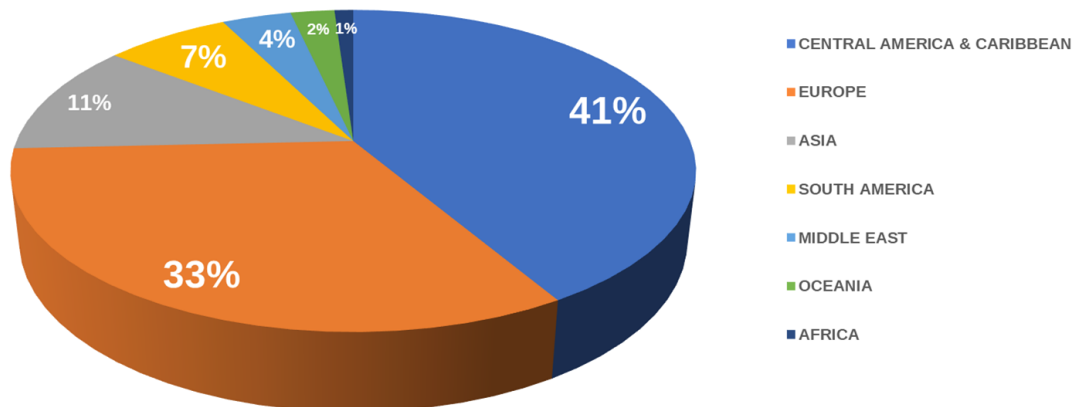
This table represents the distribution by continent of passenger traffic between the United States and the rest of the world in 2024.

These figures include the total number of passengers in both directions (for example: Africa = from the U.S. to Africa + from Africa to the U.S.) and are calculated based on data from more than 5,200 airport pairs. They concern local passengers only, namely those who board or disembark at the reporting airport, even if they continue their journey under the same flight number with an aircraft change.

	PAX 2024	% 24/23	% 24/19
Latin America	114,244,991	8,0	22,0
Europe	77,206,307	7,5	3,0
Asia & Pacific	32,324,891	18,3	-18,2
Africa & Middle-East	11,696,509	-1,5	13,1
Total*	235,472,698	8,6	7,8



USA intercontinental traffic distribution 2024



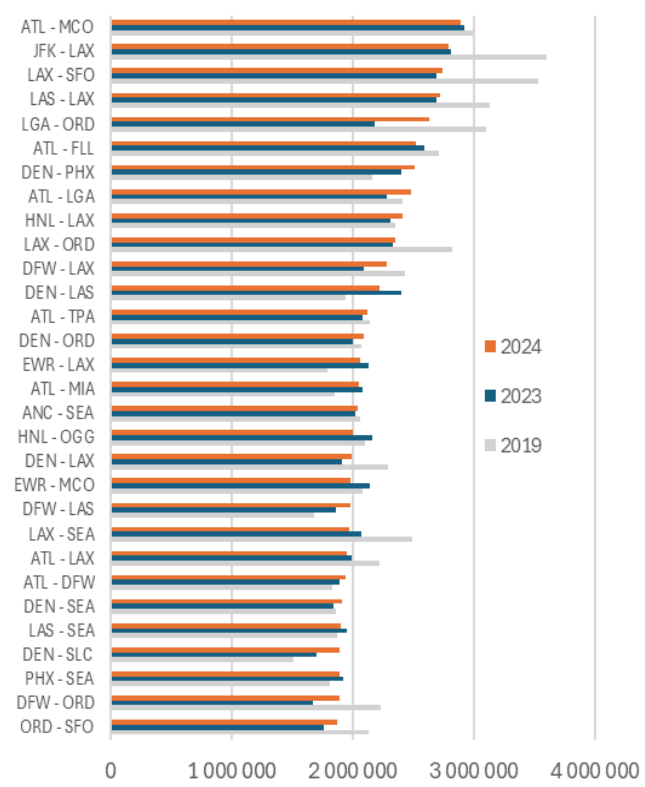
Sources : FRACS Air transport database



8 NORTH AMERICA

North American traffic remains dominated by high-density domestic trunk routes. In 2024, Atlanta–Orlando retains first place with 2.89 million passengers, ahead of New York JFK–Los Angeles and Los Angeles–San Francisco, despite traffic levels on several historic routes still being below those of 2019. Overall, the U.S. domestic market grows by +4.0% compared with 2023, confirming a now more moderate pace of growth.

Airport	Airport	Dist. Km	2024	% 24/23	% 24/19
ATLANTA	ORLANDO, FL	649	2,893,272	-0,9	-3,3
NEW YORK - JFK	SAN ANGELES INTL	3,974	2,787,311	-0,9	-22,5
LOS ANGELES INTL	SAN FRANCISCO	545	2,738,628	1,8	-22,3
LAS VEGAS	LOS ANGELES INTL	379	2,715,031	0,8	-13,2
NEW YORK - LGA	CHICAGO - ORD	1,177	2,625,182	20,5	-15,4
ATLANTA	FORT LAUDERDALE	938	2,523,098	-2,4	-6,8
DENVER	PHOENIX	950	2,507,917	4,5	16,4
ATLANTA	NEW YORK - LGA	1,224	2,482,073	8,7	2,9
HONOLULU	LOS ANGELES INTL	4,109	2,412,749	4,4	2,5
LOS ANGELES INTL	CHICAGO - ORD	2,802	2,347,590	0,9	-16,8
DALLAS - FORT WORTH	LOS ANGELES INTL	1,982	2,279,649	9,0	-6,3
DENVER	LAS VEGAS	990	2,216,159	-7,5	14,5
ATLANTA	TAMPA - TPA	657	2,114,708	1,5	-1,0
DENVER	CHICAGO - ORD	1,447	2,086,922	4,2	0,7
NEW YORK - EWR	LOS ANGELES INTL	3,941	2,054,556	-3,6	14,9
ATLANTA	MIAMI - INTL	960	2,046,294	-1,6	10,7
ANCHORAGE	SEATTLE	2,326	2,034,895	0,7	-1,0
HONOLULU	KAHULUI	163	2,002,964	-7,4	-4,5
DENVER	LOS ANGELES INTL	1,364	1,992,731	4,5	-13,1
NEW YORK - EWR	ORLANDO, FL	1,509	1,977,900	-7,4	-5,1
DALLAS - FORT WORTH	LAS VEGAS	1,695	1,974,346	6,4	17,2
LOS ANGELES INTL	SEATTLE	1,538	1,971,547	-4,5	-20,8
ATLANTA	LOS ANGELES INTL	3,124	1,950,301	-2,1	-12,1
ATLANTA	DALLAS - FORT WORTH	1,173	1,941,203	2,9	6,1
DENVER	SEATTLE	1,636	1,908,936	3,6	2,6
LAS VEGAS	SEATTLE	1,394	1,901,982	-2,4	1,7
DENVER	SALT LAKE CITY	611	1,889,742	11,1	25,1
PHOENIX	SEATTLE	1,781	1,887,893	-1,6	4,4
DALLAS - FORT WORTH	CHICAGO - ORD	1,286	1,886,474	12,7	-15,2
CHICAGO - ORD	SAN FRANCISCO	2,965	1,869,234	6,4	-12,2
Total Domestic			836,963,063	4,0	4,6



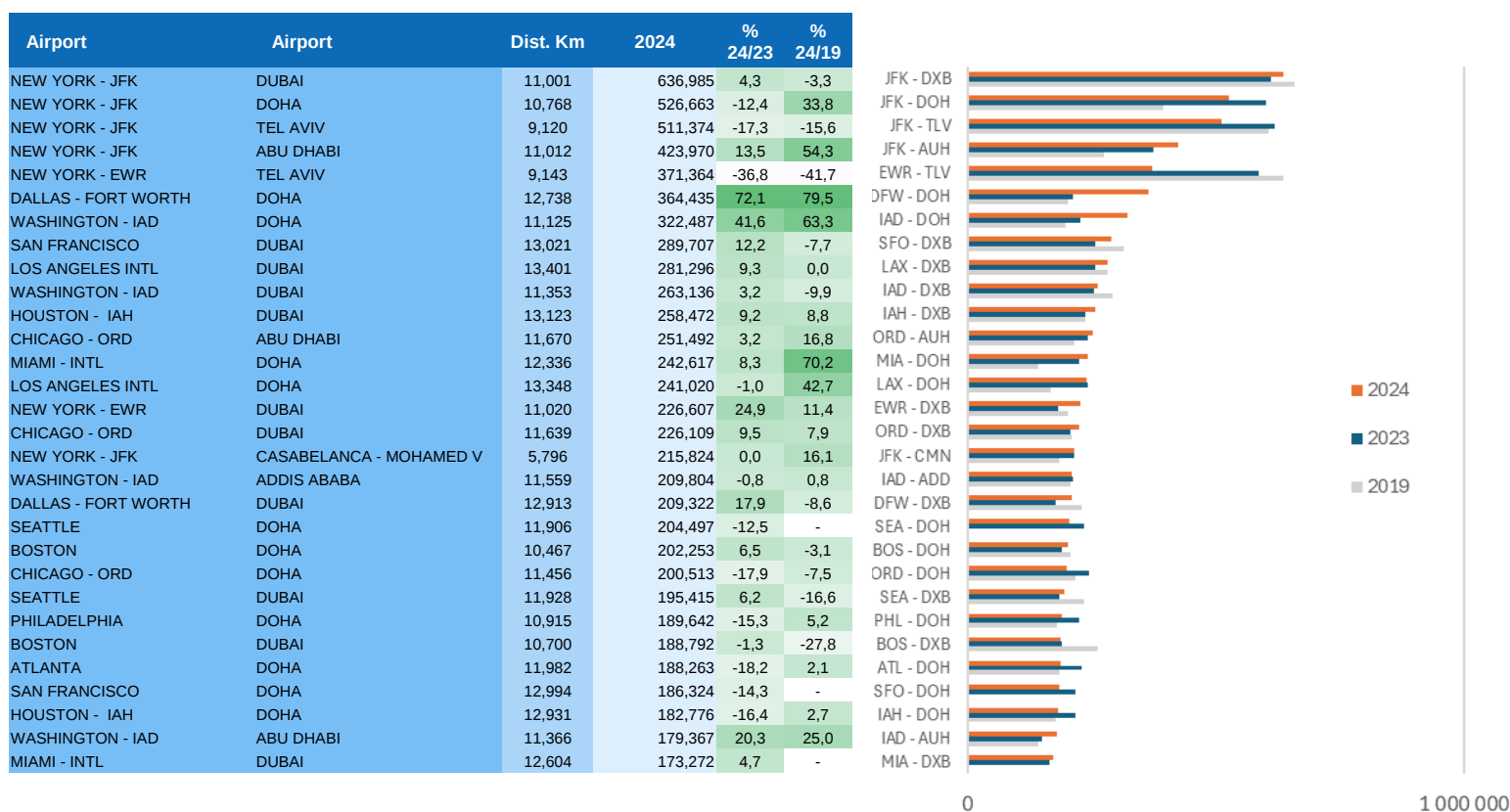
Airport	Airport	Dist. Km	2024	% 24/23	% 24/19
NEW YORK - LGA	TORONTO - YYZ	575	1,045,689	-8,3	-31,9
LOS ANGELES INTL	VANCOUVER	1,741	963,383	2,1	-1,5
CHICAGO - ORD	TORONTO - YYZ	700	910,280	22,4	-9,4
SAN FRANCISCO	VANCOUVER	1,288	816,810	3,0	11,2
FORT LAUDERDALE	TORONTO - YYZ	1,959	804,589	23,1	34,1
ORLANDO, FL	TORONTO - YYZ	1,701	791,940	0,1	-0,3
LOS ANGELES INTL	TORONTO - YYZ	3,494	767,419	15,2	-6,3
SEATTLE	VANCOUVER	203	668,756	6,9	-14,4
FORT LAUDERDALE	MONTREAL - YUL	2,232	644,801	22,9	28,6
SAN FRANCISCO	TORONTO - YYZ	3,628	620,575	11,5	-5,0
Total USA - CANADA			31,109,022	8,7	-2,4

Traffic between the United States and Canada shows a more contrasted dynamic. While some connections record strong increases, overall traffic remains slightly below its pre-pandemic level (-2.4%), reflecting an as-yet incomplete recovery on these cross-border segments.

Sources : FRACS Air transport data, ACI

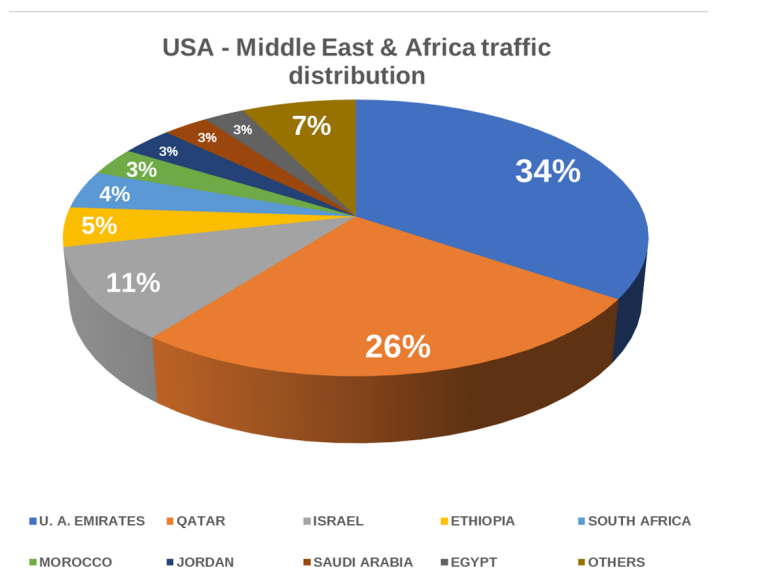
9 AFRICA & MIDDLE-EAST

In 2024, air traffic between the United States and the Africa & Middle East region shows a contrasted trend, driven by the strength of Gulf hubs. The top five routes are dominated by connections linking major U.S. metropolitan areas to Dubai and Doha: New York JFK–Dubai retains first place (+4.3% compared with 2023), ahead of New York JFK–Doha, which is down year on year but shows strong growth compared with 2019 (+33.8%). Dallas/Fort Worth–Doha, New York JFK–Tel Aviv, and New York JFK–Abu Dhabi complete the ranking, illustrating both Doha’s rising prominence in the U.S. market and the impact of the geopolitical context on certain routes.



By contrast, routes to Tel Aviv experience a clear downturn: New York JFK–Tel Aviv (-17.3%) and especially New York EWR–Tel Aviv (-36.8%) post sharp declines, with traffic remaining well below pre-pandemic levels, a direct reflection of the regional geopolitical situation.

Overall, the U.S.–Africa & Middle East market continues to be supported by connections with Gulf hubs, particularly Doha and Abu Dhabi, while routes to destinations more sensitive to geopolitical conditions are undergoing more pronounced adjustments.

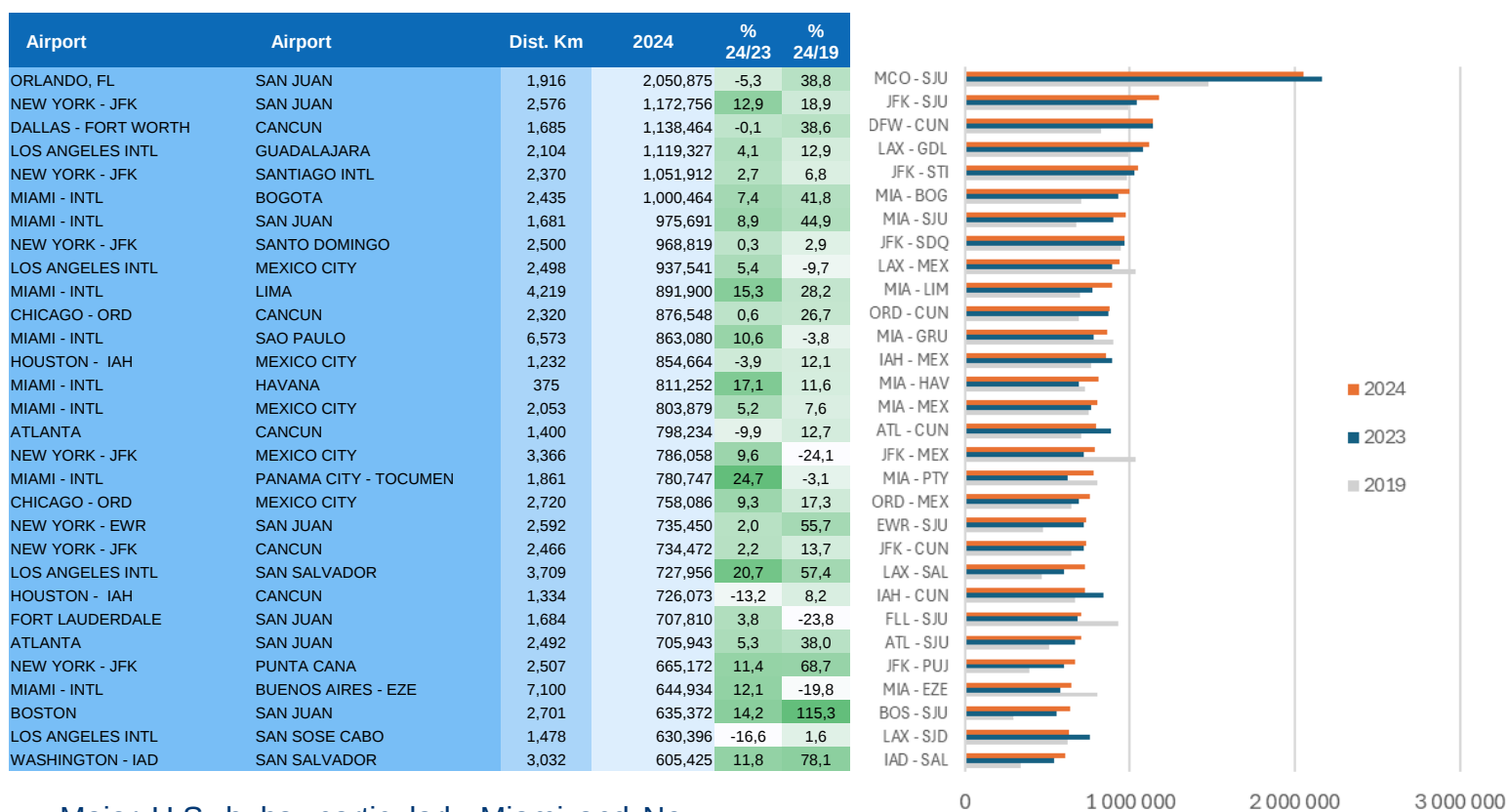


Sources : FRACS Air transport data, ACI

10 LATIN AMERICA & CARIBBEAN

Routes between the United States, Latin America, and the Caribbean continue to be dominated by tourist destinations that are particularly popular with U.S. travelers, notably Puerto Rico and Cancún.

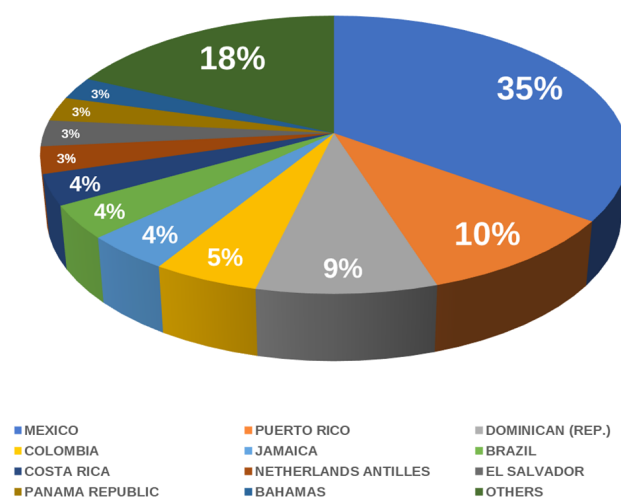
In 2024, Orlando–San Juan clearly leads the ranking with 2.05 million passengers, despite a slight decline compared with 2023 (-5.3%), while traffic remains well above its pre-pandemic level (+38.8%). New York JFK–San Juan and Dallas/Fort Worth–Cancún complete the podium, confirming the central role of the Caribbean and Mexico in air traffic exchanges with the United States.



Major U.S. hubs, particularly Miami and New York JFK, concentrate a significant share of flows to Latin America, with notable growth on several key routes, especially to Bogotá, Lima, or Panama City. By contrast, some routes to Mexico or Central America show more contrasted trends, reflecting capacity adjustments following a phase of strong recovery.

Overall, the U.S.–Latin America & Caribbean market remains firmly anchored above its 2019 levels, driven by leisure demand and the density of regional connections.

USA - Latin America traffic distribution



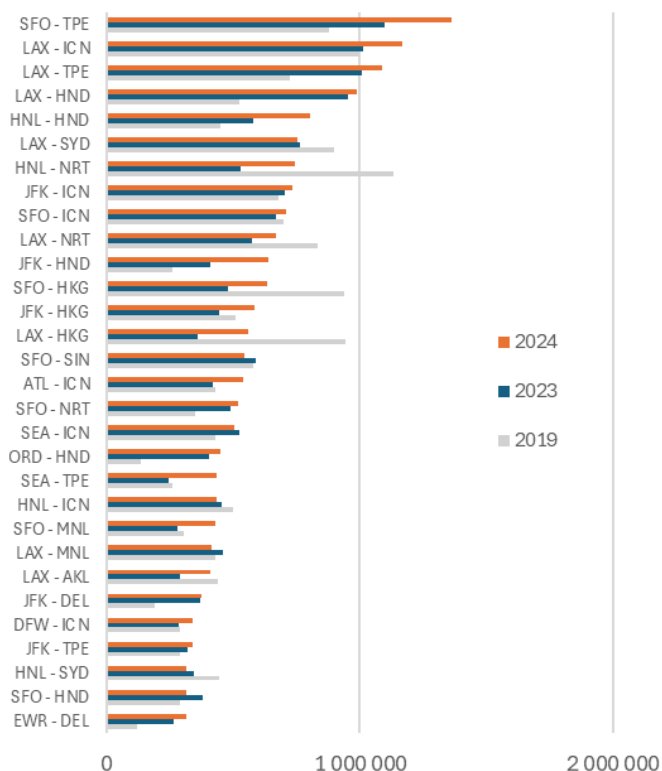
Sources : FRACS Air transport data, ACI



11 ASIA-PACIFIC

The transpacific market remains one of the most dynamic segments of U.S. long-haul traffic. In 2024, routes between the United States and the Asia–Pacific region are dominated by corridors linking the West Coast to major Northeast Asian hubs. San Francisco–Taipei ranks first with 1.36 million passengers, posting strong year-on-year growth (+24.3%) and standing well above its 2019 level (+54.9%). Los Angeles–Seoul and Los Angeles–Taipei complete the podium, confirming the structuring role of Californian hubs in traffic flows with the region.

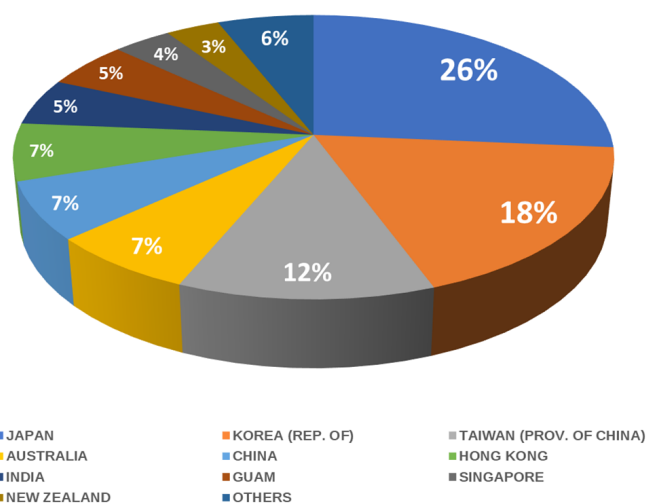
Airport	Airport	Dist. Km	2024	% 24/23	% 24/19
SAN FRANCISCO	TAIPEI	10,370	1,361,848	24,3	54,9
LOS ANGELES INTL	SEOUL - ICN	9,598	1,165,052	15,0	16,9
LOS ANGELES INTL	TAIPEI	10,903	1,087,890	7,7	50,0
LOS ANGELES INTL	TOKYO - HND	8,815	989,957	3,8	89,1
HONOLULU	TOKYO - HND	6,191	801,753	38,1	78,0
LOS ANGELES INTL	SYDNEY	12,061	754,874	-1,0	-15,9
HONOLULU	TOKYO - NRT	6,141	744,066	41,0	-34,2
NEW YORK - JFK	SEOUL - ICN	11,072	734,916	4,3	8,6
SAN FRANCISCO	SEOUL - ICN	9,056	709,184	6,1	1,4
LOS ANGELES INTL	TOKYO - NRT	8,760	668,517	17,0	-19,6
NEW YORK - JFK	TOKYO - HND	10,876	638,066	56,0	145,6
SAN FRANCISCO	HONG KONG	11,106	635,209	32,5	-32,4
NEW YORK - JFK	HONG KONG	12,965	582,471	31,0	14,3
LOS ANGELES INTL	HONG KONG	11,644	558,772	55,8	-40,7
SAN FRANCISCO	SINGAPORE - CHANGI	13,582	545,648	-7,4	-5,7
ATLANTA	SEOUL - ICN	11,464	538,208	27,8	25,3
SAN FRANCISCO	TOKYO - NRT	8,232	517,961	6,3	48,3
SEATTLE	SEOUL - ICN	8,347	504,358	-4,0	17,8
CHICAGO - ORD	TOKYO - HND	10,125	448,435	10,7	229,9
SEATTLE	TAIPEI	9,740	433,653	76,6	68,6
HONOLULU	SEOUL - ICN	7,319	432,752	-4,6	-13,2
SAN FRANCISCO	MANILA	11,228	430,779	53,6	41,7
LOS ANGELES INTL	MANILA	11,741	412,830	-9,7	-3,6
LOS ANGELES INTL	AUCKLAND	10,486	408,716	42,2	-7,1
NEW YORK - JFK	DELHI	11,756	375,179	1,6	96,1
DALLAS - FORT WORTH	SEOUL - ICN	10,957	337,507	19,0	16,6
NEW YORK - JFK	TAIPEI	12,540	337,184	6,2	15,7
HONOLULU	SYDNEY	8,171	316,157	-7,6	-29,1
SAN FRANCISCO	TOKYO - HND	8,287	315,086	-16,6	9,4
NEW YORK - EWR	DELHI	11,765	312,619	18,3	157,0



The recovery is particularly pronounced in the Japanese and Taiwanese markets. Routes to Tokyo Haneda, notably from Los Angeles, New York JFK, and Chicago O'Hare, record traffic levels well above those of 2019, reflecting a lasting redeployment of capacity toward the Japanese airport. Honolulu–Tokyo also stands out with strong growth (+41% compared with 2024).

By contrast, some routes to Hong Kong, Sydney, or Singapore remain below their pre-pandemic levels despite marked increases in 2024.

USA - Asia & Oceania traffic distribution



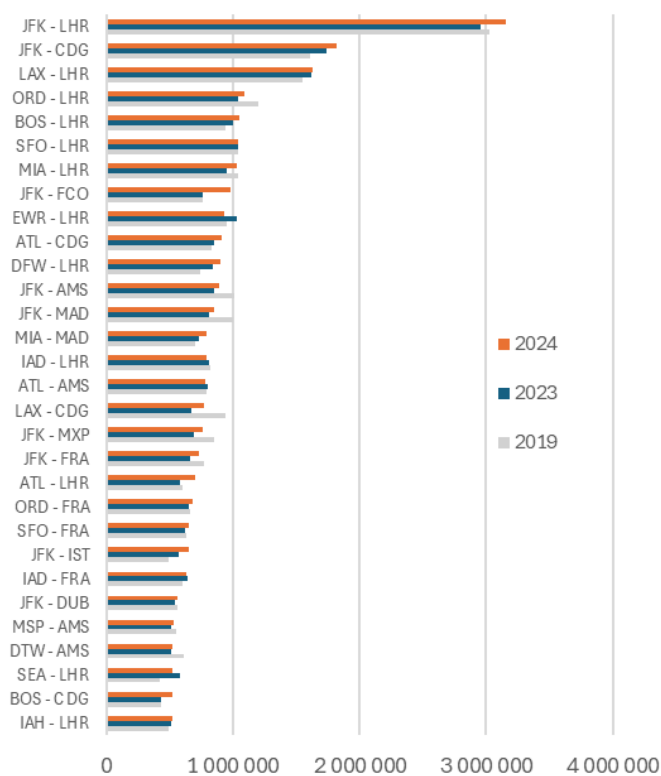
Sources : FRACS Air transport data, ACI



12 EUROPE

Transatlantic flows between the United States and Europe remain heavily concentrated around the major hubs of Western Europe. In 2024, New York JFK–London Heathrow by far retains first place with 3.16 million passengers, up +6.7% year on year and slightly above its 2019 level (+4.5%). New York JFK–Paris CDG and Los Angeles–London Heathrow complete the podium, confirming the structuring role of London and, to a lesser extent, Paris in transatlantic traffic flows.

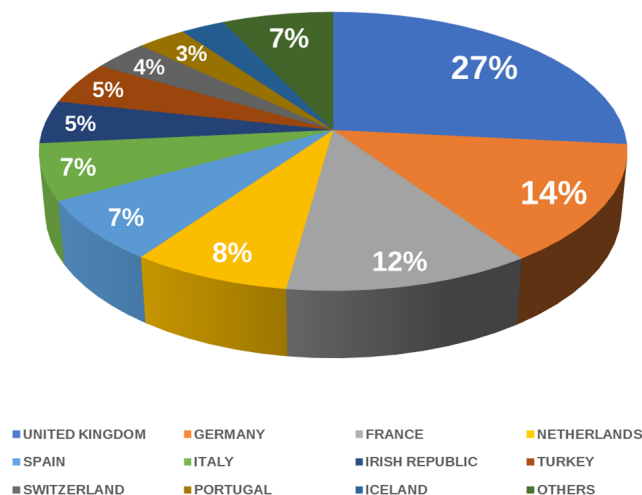
Airport	Airport	Dist. Km	2024	% 24/23	% 24/19
NEW YORK - JFK	LONDON - LHR	5,541	3,157,636	6,7	4,5
NEW YORK - JFK	PARIS - CDG	5,834	1,814,036	4,6	12,7
LOS ANGELES INTL	LONDON - LHR	8,761	1,624,070	0,5	5,2
CHICAGO - ORD	LONDON - LHR	6,344	1,094,355	4,9	-9,0
BOSTON	LONDON - LHR	5,240	1,048,515	5,3	11,9
SAN FRANCISCO	LONDON - LHR	8,618	1,042,220	-0,1	0,0
MIAMI - INTL	LONDON - LHR	7,109	1,033,558	9,3	-0,4
NEW YORK - JFK	ROMA - FCO	6,867	978,609	29,2	28,5
NEW YORK - EWR	LONDON - LHR	5,563	925,277	-9,9	-2,2
ATLANTA	PARIS - CDG	7,055	906,557	6,1	8,8
DALLAS - FORT WORTH	LONDON - LHR	7,623	899,082	6,9	21,8
NEW YORK - JFK	AMSTERDAM	5,849	888,521	4,4	-11,6
NEW YORK - JFK	MADRID - BARAJA	5,763	846,146	4,8	-15,7
MIAMI - INTL	MADRID - BARAJA	7,106	788,779	7,5	12,8
WASHINGTON - IAD	LONDON - LHR	5,902	787,477	-2,7	-4,2
ATLANTA	AMSTERDAM	7,066	778,237	-3,2	-1,6
LOS ANGELES INTL	PARIS - CDG	9,103	773,673	15,2	-17,9
NEW YORK - JFK	MILANO - MXP	6,414	756,892	9,0	-11,5
NEW YORK - JFK	FRANKFURT	6,190	734,562	11,2	-4,3
ATLANTA	LONDON - LHR	6,761	705,278	21,1	18,0
CHICAGO - ORD	FRANKFURT	6,970	683,014	4,9	2,9
SAN FRANCISCO	FRANKFURT	9,149	654,090	4,9	3,0
NEW YORK - JFK	ISTANBUL	8,029	646,560	12,8	31,5
WASHINGTON - IAD	FRANKFURT	6,550	629,691	-1,2	4,3
NEW YORK - JFK	DUBLIN	5,105	560,485	4,4	0,3
MINNEAPOLIS	AMSTERDAM	6,684	533,942	4,6	-2,9
DETROIT - WAYNE COUNTY	AMSTERDAM	6,324	525,872	2,8	-13,5
SEATTLE	LONDON - LHR	7,702	524,476	-9,8	25,5
BOSTON	PARIS - CDG	5,534	522,501	21,7	20,1
HOUSTON - IAH	LONDON - LHR	7,763	520,806	2,6	5,3



Several corridors show particularly strong momentum, especially toward Southern Europe. New York JFK–Rome (+29.2%) and Boston–Paris CDG (+21.7%) illustrate the strength of tourist traffic, while Atlanta–London Heathrow (+21.1%) and Dallas/Fort Worth–London Heathrow (+6.9%) reflect the strengthening of connections from major U.S. interior hubs.

By contrast, some routes to Northern Europe, notably Amsterdam or Frankfurt, remain slightly below their pre-pandemic levels.

USA - Europe traffic distribution



Sources : FRACS Air transport data, ACI



13 AIRLINERS' ORDERS AND DELIVERIES - Q3 2025

In the third quarter of 2025, aircraft manufacturers continue to ramp up production in an effort to meet still-strong demand.

Airbus maintains its lead in deliveries, with 507 aircraft delivered since the beginning of the year, slightly up compared with 2024, mainly A320-family jets. Boeing shows a marked acceleration, totaling 440 deliveries over the period, a significant increase year on year, driven by 737 deliveries.

On the orders side, the dynamic reverses. Boeing records 821 orders since the start of the year, eclipsing the previous year's figures thanks to strong sales of the 737 and 787. Airbus, with 610 orders, sees its order intake slightly reduced despite strong demand for the A320.

Deliveries	Q1 2025	Q2 2025	Q3 2025	Q3/4 2025	Q3/4 25/24 Variation	2024
Airbus	136	170	201	507	10	766
Boeing	130	150	160	440	158	339
Embraer	7	19	20	46	-1	57
ATR	n.a.	n.a.	n.a.	-	-	35
Comac	n.a.	n.a.	n.a.	-	-	48

Orders	Q1 2025	Q2 2025	Q3 2025	Q3/4 2025	Q3/4 25/24 Variation	2024
Airbus	280	214	116	610	-57	878
Boeing	241	427	153	821	506	569
Embraer	0	120	73	193	75	28
ATR	n.a.	n.a.	n.a.	-	-	56
Comac	n.a.	n.a.	n.a.	-	-	n.a.

Deliveries	Type	Q1 2025	Q2 2025	Q3 2025	Q3/4 2025	Q3/4 25/24 Variation	2024
Airbus	A222	17	24	21	62	14	84
	A320	106	126	160	392	-1	593
	A330	4	8	8	20	0	32
	A350	9	12	12	33	-3	57
Boeing	B737	105	104	121	330	101	265
	B767	5	9	6	20	5	18
	B777	7	13	9	29	18	14
	B787	13	24	24	61	34	42
Embraer	EMB170	0	0	0	0	0	0
	EMB175	4	9	7	20	5	19
	EMB190	0	1	2	3	-9	14
	EMB195	3	9	11	23	3	38
ATR	ATR-42	n.a.	n.a.	n.a.	n.a.	-	35
	ATR-72	n.a.	n.a.	n.a.	n.a.	-	
Comac	C909	n.a.	n.a.	n.a.	n.a.	-	35
	C919	n.a.	n.a.	n.a.	n.a.	-	13

Orders	Type	Q1 2025	Q2 2025	Q3 2025	Q3/4 2025	Q3/4 25/24 Variation	2024
Airbus	A222	0	40	0	40	29	18
	A320	233	58	80	371	-85	636
	A330	10	61	19	90	26	82
	A350	37	55	17	109	-27	142
Boeing	B737	135	208	67	410	176	417
	B767	0	0	0	0	0	23
	B777	53	30	14	97	39	66
	B787	53	189	72	314	291	63
Embraer	EMB170	0	0	0	0	0	0
	EMB175	0	57	-1	56	-34	90
	EMB190	0	15	0	15	-2	17
	EMB195	0	48	74	122	111	11
ATR	ATR-42	n.a.	n.a.	n.a.	-	-	5
	ATR-72	n.a.	n.a.	n.a.	-	-	51
Comac	C909	n.a.	n.a.	n.a.	-	-	n.a.
	C919	n.a.	n.a.	n.a.	-	-	300

Source : FRACS Air transport data



OUR DATABASES AND SERVICES

We are grateful for your reading and your interest.
Don't miss our upcoming issue next in April 2026!

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- Traffic flows : country-pair and city-pairs for over 200 countries and 2500 airports world-wide since 1970.
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