



PASSENGER FORECAST

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The five fastest-growing markets in terms of **annual additional passengers** in 2036 compared to 2016 will be:

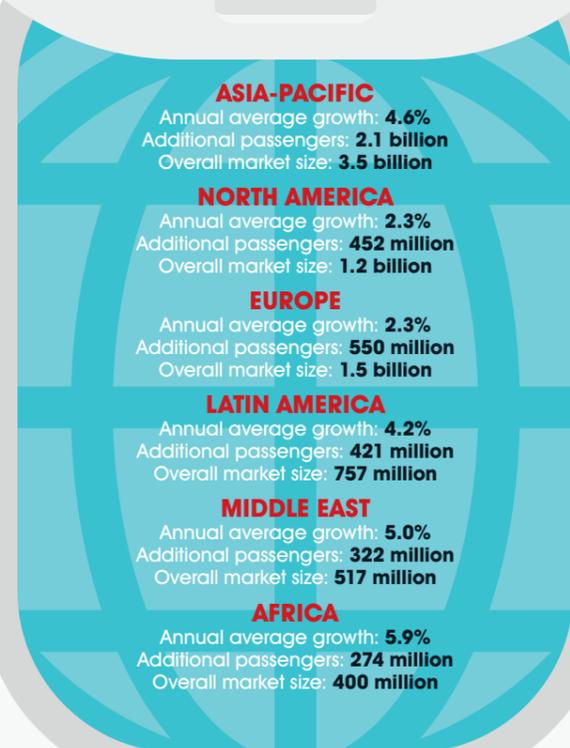
- 1. China** (921 million new passengers for a total of 1.5 billion)
- 2. USA** (401 million new passengers for a total of 1.1 billion)
- 3. India** (337 million new passengers for a total of 478 million)
- 4. Indonesia** (235 million new passengers for a total of 355 million)
- 5. Turkey** (119 million new passengers for a total of 196 million).

The largest 10 passenger markets

(ranked by passenger numbers to, from, and within each country)

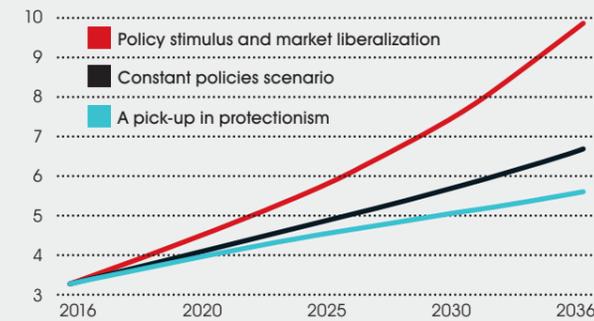
	2016	2036
1.	USA	China
2.	China	USA
3.	UK	India
4.	Japan	Indonesia
5.	Spain	UK
6.	Germany	Japan
7.	India	Spain
8.	Italy	Germany
9.	France	Turkey
10.	Indonesia	Thailand

Growth by region



Alternative scenarios for passenger traffic

(Global passengers O-D basis, billion)



If trade protectionism and travel restrictions are put in place, growth could slow to 2.7%, meaning **1.1 billion fewer passenger journeys annually in 2036**. If moves towards liberalization increase, growth could be more than two percentage points faster, leading to a tripling in passengers over the next 20 years.

Many African states will experience a **compound growth rate of more than 7.2% per year**, meaning their markets will **double in size every 10 years**.

2022



The point at which **China will displace the United States** as the world's largest aviation market (defined as traffic to, from and within the country) is forecast to occur around 2022.

Country pairs with the biggest changes in passenger numbers

(International only)

Country pair	Additional million pax per year by 2036	Annual growth
India - UAE	20.2	5.9%
China - Thailand	19.1	4.3%
China - Korea	17.7	3.6%
China - Singapore	15.0	7.0%
USA - Mexico	14.9	2.3%
Indonesia - Malaysia	12.6	5.8%
USA - Canada	12.3	2.0%
China - Chinese Taipei	11.2	3.4%
China - USA	11.0	4.2%
India - USA	10.5	5.6%

7,800,000,000

IATA expects **7.8 billion passengers** to travel in 2036, a near **doubling** of the **4 billion** expected to fly this year.

The biggest driver of demand will be the **Asia-Pacific** region. The region will be the source of **more than half** the new passengers over the next two decades.