
Global air demand, as measured in revenue passenger kilometers, continued its growth trend in November, increasing 5.7 percent year over year, after growth of 6.6 percent versus a year prior in October, according to the International Air Transport Association.

Total capacity, as measured in available seat kilometers, increased 5.4 percent compared with November 2024. The November 2025 load factor increased 0.3 percentage points to 83.7 percent, a record for the month, according to IATA.

November international traffic increased 7.7 percent year over year, while capacity was up 7.1 percent for the same period. The international load factor was up 0.4 percentage points to 84 percent. The month's domestic demand increased 2.7 percent versus a year prior, while capacity also was up 2.7 percent. The November domestic load factor remained unchanged compared with November 2024 at 83.2 percent.

"November 2025 saw continued strong demand for air travel with year-on-year growth," IATA director general Willie Walsh said in a statement. "Load factors reached a new record of 83.7 percent for the month as airlines continued to satisfy growing passenger demand amid continuing capacity constraints stemming from challenges in the aerospace supply chain."

Those challenges include a backlog of more than 17,000 aircraft orders reached in 2025, according to IATA, and ongoing engine shortages.

[Report continues below chart.]

North American and U.S. November air demand and capacity struggled. Much of the month was affected by the U.S. government shutdown, which extended through Nov. 12, and the associated government-mandated capacity cuts that lasted past that date.

North America had the lowest November total traffic and capacity growth rates of the regions covered by IATA, with year-over-year increases of 0.1 percent and 1.4 percent, respectively. Global load factor decreased 1.1 percentage points to 80.3 percent. November was the 10th consecutive month of year-over-year declines in passenger load factor for North America, according to IATA.

The region's November international demand grew 4 percent year over year, while capacity was up 4.2 percent for the period. The North American domestic load factor declined 0.1 percentage points in November to 81 percent.

November U.S. traffic declined 1.8 percent year over year, while capacity increased just 0.2 percent. The U.S. was the only domestic regions with a decline in November demand, and it posted the lowest capacity growth



Source: International Air Transport Association

rate as well. Domestic load factor was down 1.6 percentage points to 79.6 percent, the lowest among the domestic markets.

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Elsewhere, Africa had the highest growth rate for total November air demand at 12.6 percent year over year. The Middle East led capacity growth at 9.2 percent for the same period. Europe posted the highest November load factor at 86 percent, up 0.5 percentage points from a year prior.

Africa also had the highest November international air demand growth at 11.2 percent year over year, and the Middle East led in international capacity increases at 9.2 percent for the same period. Asia-Pacific had the highest November load factor: 85.8 percent, up 0.5 percentage points from November 2024.

In the domestic markets, Brazil reported the highest air demand growth rate at 8.3 percent year over year, while India had the highest capacity increase for the period at 8.7 percent. India also had the highest November