



Evolution of traffic to Asia/Pacific

In 2024, the Europe-Asia/Pacific (APAC) traffic flow showed remarkable resilience, with traffic growing 21% compared to 2023 and 8% above 2019 levels despite significant geopolitical challenges. The closure of airspace following the war in Ukraine led to increased costs and route adjustments for airlines, especially those with no access to Russian airspace. Additionally, China's delayed lifting of COVID-19 travel restrictions in early 2023 initially slowed recovery, though a rapid rebound followed.

Aviation market dynamics varied significantly by region and segment. While cargo flights remained robust throughout the pandemic, passenger traffic only reached pre-pandemic levels in May 2024. Regional disparities were also evident: Türkiye and Central Asian countries expanded their role as aviation hubs between Europe, APAC and the Middle East.

Airlines with access to Russian airspace recovered faster, ending 2024 with 19% more flights than in 2019, while those avoiding Russian airspace faced higher costs and longer routes, with an 18% decline in flight volumes. These disadvantages have contributed to a 7% loss in market share between 2019 and 2024, a figure that rises to 9% when considering passenger traffic alone.

Introduction

In 2024, air traffic grew 6% worldwide¹ and finished above its pre-pandemic levels by 9%. From a European perspective, flights² between the ECAC³ (European Civil Aviation Conference) area and all other regions⁴ increased compared to 2023, except to the Middle-East due to the geopolitical situation in the region.

With Russian airspace still unavailable to many airlines, it is of particular interest to see the evolution in traffic between ECAC and the Asia/Pacific (APAC) region. The comparison with 2023 was influenced by the fact that China only lifted its COVID travel restrictions early in that year, which was followed by a progressive recovery. Of more note was the comparison with pre-pandemic levels (2019); here the number of flights in 2024 grew by 8%, showing remarkable strength despite the geopolitical situation affecting flights to this region.

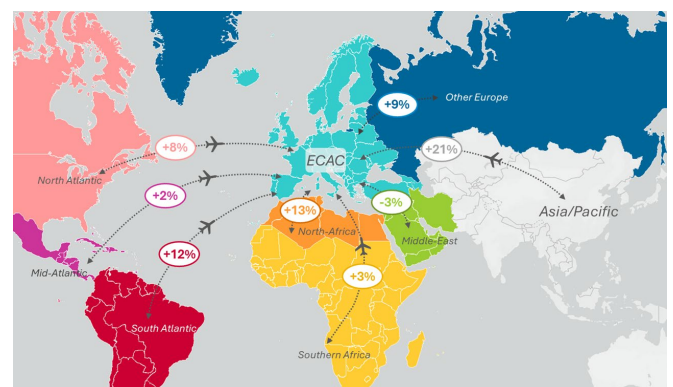
In this paper, we analyse the data behind this trend, its causes and the effects of the unavailability of the Ukrainian, Russian and Belarussian airspace to European and some other airlines.

Traffic to/from Asia Pacific (APAC)

Flights connecting ECAC and APAC in 2024 grew 21% compared to 2023 and were 8% above their pre-pandemic levels. The Russian invasion of Ukraine in February 2022 slowed down the recovery, with the closure of Ukrainian

airspace and also subsequent sanctions and airline decisions that made Russian and Belarussian airspace inaccessible to some carriers. This, combined with stringent COVID-19 travel restrictions in China, which remained in place throughout 2022, kept the APAC-ECAC flow below all other ECAC flows—except routes to and from Russia and Belarus—until mid-2023.

FIGURE 1: Growth of traffic region flows to/from ECAC 2024 vs 2023



Region	Daily Flights		
	2024	% vs 2023	% vs 2019
Middle-East	1,357	-3%	-5%
North Atlantic	1,329	+8%	+12%
North Africa	1,239	+13%	+21%
Asia/Pacific	858	+21%	+8%
Other Europe	364	+9%	-65%
Southern Africa	305	+3%	-2%
South-Atlantic	193	+12%	+4%
Mid-Atlantic	178	+2%	+3%

¹ Source: Flightradar24 Historical Global Utilisation.

² "flights" throughout this document refer to IFR movements.

³ ECAC region. See note [3].

⁴ "regions" in this document refer to the "traffic regions" defined by in Chapter 8 of the "Region definition" annex to the latest update of the [EUROCONTROL Seven-Year forecast](#).



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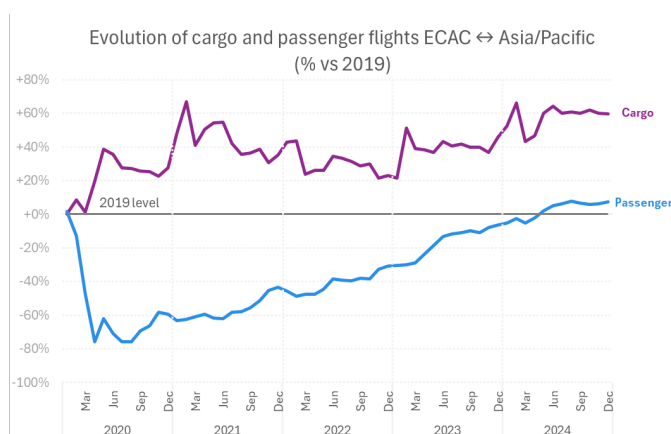
The last restrictions were lifted in early 2023, followed by an acceleration of the recovery of the ECAC-APAC flow in the first half of the year. The outbreak of the conflict in the Middle East in October 2023 caused a temporary deceleration but, by the end of 2024, the ECAC-APAC flight traffic was only behind the North Atlantic and North Africa flows in terms of recovery vs 2019.

In 2024, air traffic in the APAC region⁵ grew by 11% compared to 2023 and finished 10% above 2019 levels. After the intra-APAC traffic, which made up 86% of the total flights, the busiest flows were North Atlantic (~2,150 daily flights) and Middle-East (~1,600 daily flights); ECAC was third, with 858 daily flights – 2.4% of the total APAC traffic, a share that has remained the same since 2019. In contrast, the Middle-East flow has grown 25% since 2019 and reached 4.6% of the total share (from 4.1% in 2019).

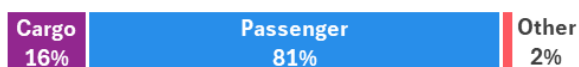
Market segments

It is important to distinguish between passenger and cargo flights when we analyse traffic flows between Europe and APAC; as we can see in Figure 2 they were very differently affected by the COVID pandemic and the various geopolitical conflicts.

FIGURE 2: Traffic variation to/from Europe, per country in Asia/Pacific region (vs 2019)



Share of flights per segment (Jan-Dec 2024)



In 2024, **cargo**⁶ flights accounted for 16% of the total traffic between Europe and APAC. Unlike passenger flights, the cargo sector proved resilient during the COVID-19 pandemic, driven by a consistently strong demand for goods and medical supplies, particularly in the early stages, and a lack of cargo space availability in passenger aircraft holds. Despite a slowdown in 2022 due to the outbreak of the war in Ukraine, the sector recovered swiftly in early 2023 and has steadily stayed largely above 2019 levels.

Passenger⁶ flights, which in 2024 represented 81% of the total traffic to the APAC region, fared worse and have suffered the effects of the different crises – COVID-19, including the travel restrictions to China throughout 2022, the effects of the war in Ukraine and the EU sanctions on Russia, and the decisions of other airlines (e.g. those from Japan and South Korea) not to fly over Russia. As a result, passenger flight volumes only recovered to 2019 levels in May 2024.

APAC flows to Armenia, Azerbaijan, Georgia and Türkiye vs rest of ECAC

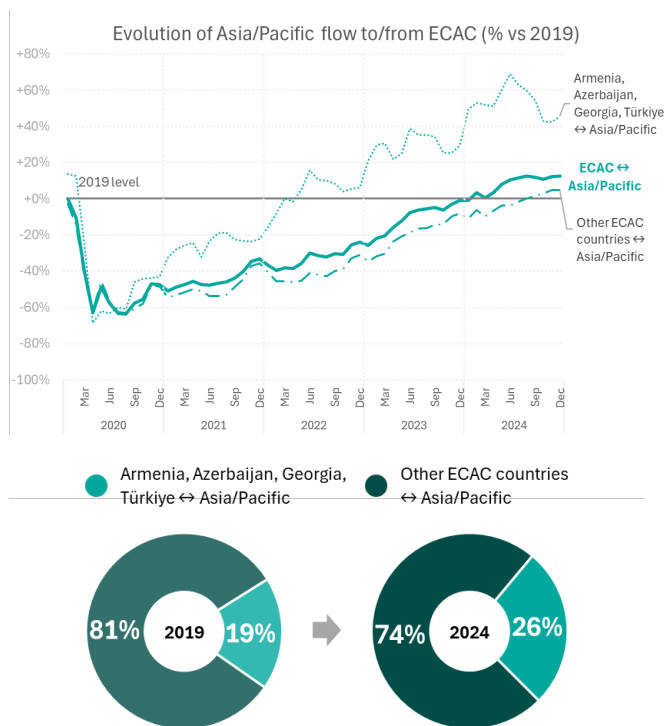
There is a notable difference between ECAC members located fully, or mostly, in Asia (**Armenia, Azerbaijan, Georgia and Türkiye**) and the rest of ECAC members; Figure 3 shows how the flows with APAC have behaved very differently. The post-COVID recovery started faster for the first group of countries, boosted by the cargo segment. In addition, the war in Ukraine had a different effect compared to the rest of ECAC, as Türkiye and countries in the Caucasus region became connecting hubs for flights between Europe, Asia, the Middle East and Russia.

As a result, traffic between Armenia, Azerbaijan, Georgia, Türkiye and APAC had already reached 2019 levels in May 2022, whereas the flow to the rest of ECAC only surpassed 2019 levels in August 2024. By the end of 2024, these countries accounted for 26% of the traffic between ECAC and APAC, a significant rise from 19% in 2019.

⁵ Source: Flightradar24 Historical Global Utilisation.

⁶ For this analysis, we consider the following market segments as defined by [STATFOR](#): for cargo flights – All-Cargo; for passenger flights – Mainline, Low-Cost, Regional and Non-Scheduled.

FIGURE 3: Evolution of recovery vs 2019 of traffic APAC to/from Armenia, Azerbaijan, Georgia and Türkiye and the rest of ECAC members



Breakdown by country

The traffic growth in 2024 between ECAC and APAC was largely led by China, as it represents 33% of the traffic to the region. If we look at the main markets:

- Traffic to/from **China** grew by 87 flights a day (+45%) compared to 2023, as this was a year of recovery following the lifting of the COVID-related travel restrictions early in 2023. Despite the unavailability of Russian and Ukrainian airspace, traffic was 11 daily flights (4%) above 2019.
- **India** (15% of traffic) also had a strong growth in 2024 (+14 flights/day, or +13%) and was 30% (28 flights/day) above 2019 levels. It posted growth to its main European markets compared to 2023 – UK: +5%; Germany: +17%; France: +2%. The largest traffic growth was, however, with Azerbaijan (+154%).
- **Kazakhstan**, which was 6th in the rankings in 2019, reached now third in 2024, with 9% of the share, overtaking Japan, South Korea and Thailand. The

growth was largely driven by traffic to/from Türkiye, Azerbaijan and Georgia which, combined, was 60% (20 daily flights) higher than in 2019.

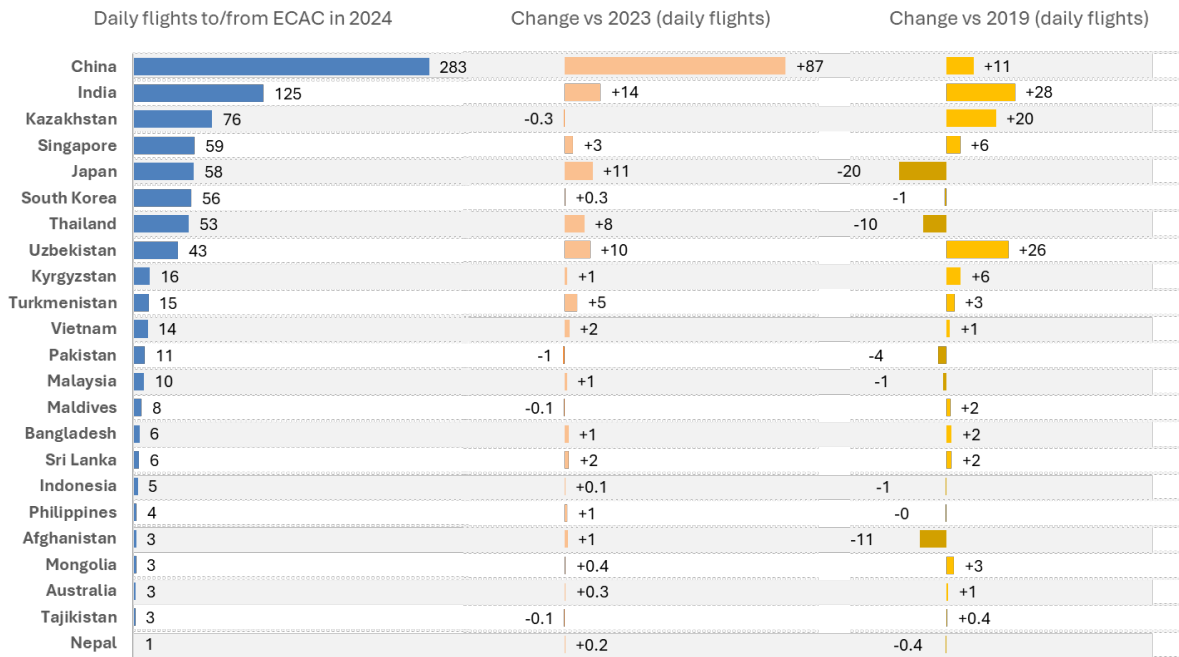
- **Singapore, Japan and South Korea** each had a similar share of traffic (7%) but are facing very different situations:
 - Singapore grew 6% (3 flights/day) in 2024 and is 11% (6 flights/day) above 2019 levels; it is not much affected by the unavailability of Russian airspace. Being further south than Japan and South Korea, the additional distance flown by affected airlines is much smaller and more related to the closure of Ukrainian airspace.
 - Japan posted strong growth in 2024 but was still far from 2019 levels (-25%, or -20 flights/day) whereas South Korea was already close to pre-pandemic levels (-1%) despite showing flat growth in 2024. In both cases, the additional distances flown while avoiding Russia are enormous (see Figure 5) and, despite neither government having issued official directives banning flying through Russian airspace, airlines from both countries have proactively chosen to avoid Russia.
- **Thailand**, the fourth market in 2019, dropped to 7th in 2024 as in recent years it has fallen out of favour with European tourists due to factors such as a stronger Thai baht, a perception of overcrowding and overdevelopment, and environmental concerns. The COVID-19 pandemic accelerated this decline. 2024 saw a strong recovery with a 17% traffic increase, but daily flights to Europe were still down by 12% compared to 2019.

It is worth noting the growth of air travel from ECAC to countries in central Asia is mainly driven by **Türkiye's** expanding role in the region. Türkiye signed bilateral agreements with Kazakhstan and Uzbekistan in 2022 and 2023, respectively, to boost the number of weekly flights with these countries and also strengthened aviation ties with Kyrgyzstan. Additionally, the war in Ukraine has increased these countries' importance as connecting hubs between Europe, Asia, the Middle East and Russia. As an example, Baku has become an important refuelling station for many all-cargo carriers.

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FIGURE 4: Traffic variation to/from Europe, per country in Asia/Pacific region (vs 2023, 2019)



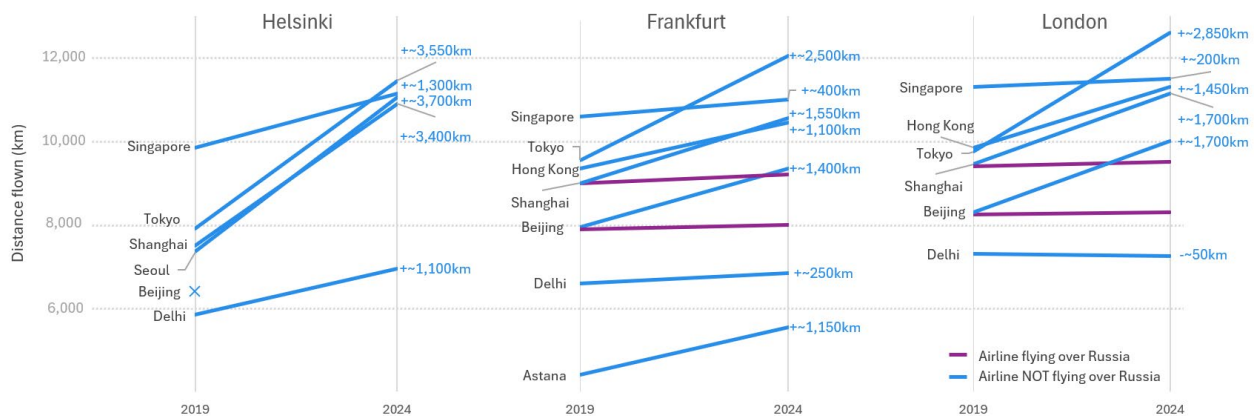
Impact of Russian and Belarusian airspace unavailability

Figure 5 shows some examples of the extra distances flown for selected city pairs by those companies for which Russian airspace is not available.

Cities in northern Europe are particularly impacted, especially those close to the Russian border. The extreme example is **Helsinki** for which a flight to Tokyo is ~3550km longer, equivalent to around 4 hours of additional time and 20 tonnes of fuel burn.

The extra fuel and costs directly impact ticket prices and, when combined with the additional flying time, significantly affect demand for these flights, with reduced frequencies by many mainline airlines, as we can see in Table 1. Some routes have been simply abandoned, e.g. Finnair dropped Helsinki-Beijing in soon after the outbreak of the war in Ukraine and, in October 2024, both British Airways and Lufthansa stopped their Beijing flights from London and Frankfurt respectively.

FIGURE 5: Excess distance flown between selected city pairs when avoiding Russian airspace



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In Figure 6, we break down the traffic evolution for the passenger and cargo segments between airlines flying over Russia and those which do not.

If we zoom in on the passenger flights, we can see how the evolution of both groups has diverged, in particular since spring 2023 with the lifting of the travel restrictions to China and the start of the IATA summer season. By June 2023, these airlines had fully recovered their 2019 levels and, in 2024, were 19% above them. In contrast, operators not flying through Russian airspace recovered at a much slower pace and, in 2024, were -18% of 2019 levels.

The divergence of the two operator groups is not surprising considering the extra distance, and associated cost, of circumnavigating Russia. As a result, these operators have lost 7% of their market share compared to 2019, 9% if we consider only passenger flights.

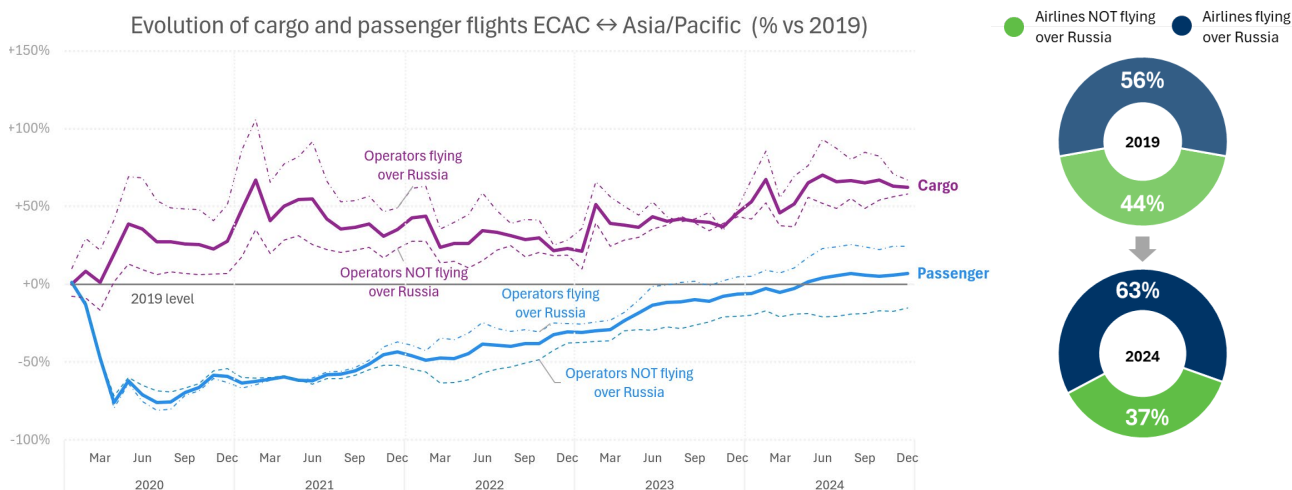
Table 1 shows how **Finnair** tops the list of daily flights lost (12) when comparing with 2019. We can also see traditional mainline European operators in the same list –

Lufthansa, British Airways, KLM and Air France, as well as the Japanese operator **All Nippon Airways**. Also in the list but for different reasons is Cathay Pacific, a Hong Kong based operator which was significantly impacted by the COVID pandemic. The persistent travel bans severely affected the company which struggled to bounce back leading to a severe trimming of its schedules in 2023-24.

In contrast, when comparing with 2019, operators from **Türkiye, Central Asia and India** populate the majority of the list of operators having increased their flights, as they are not affected by the unavailability of Russian airspace. We discussed earlier the strengthened ties between Türkiye and countries in the Caucasus leading to a significant traffic growth, and the new geopolitical position of these countries as a result of the war in Ukraine.

Table 1 shows that there are now four Chinese operators in the top ten, which illustrates the growth of traffic to/from China after the lifting of the travel restrictions in 2023.

FIGURE 6: Evolution of recovery vs 2019 of traffic APAC to/from Europe, grouped by operators flying/not flying over Russia and broken down by passenger and cargo flights.



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TABLE 1: Airline frequency increase/decrease of Europe-APAC flights 2024 vs 2019 and 2023

Pax airlines vs 2019				Pax airlines vs 2023	
(top flight losses)		(top flight gains)		(top flight gains)	
Airline	Dif daily Flights	Airline	Dif daily Flights	Airline	Dif daily Flights
Finnair	-12	Turkish Airlines	+26	Air China	+20
Cathay Pacific	-12	SCAT Airlines	+8	Turkish Airlines	+14
Lufthansa	-9	Pegasus	+8	China Eastern	+9
British Airways	-7	Azerbaijan Airlines	+8	China Southern	+8
PIA Pakistan	-7	Vistara	+8	SCAT Airlines	+8
International Airlines	-7	Uzbekistan Airways	+7	Hainan Airlines	+6
KLM	-6	IndiGo	+5	Lufthansa	+6
Air France	-6	Air India	+4	Air India	+5
Ukraine International*	-6	Virgin Atlantic	+4	Azerbaijan Airlines	+4
All Nippon Airways	-6	China Eastern	+3	Thai Airways	+4
Jet Airways India*	-5				

* These airlines ceased operations in 2019 (Jet Airways India) and 2022 (Ukraine International), respectively.

Conclusions

Traffic between Europe and the Asia/Pacific (APAC) region has recovered strongly over the past two years. Despite significant disruptions (stemming from the war in Ukraine, which rendered its airspace inaccessible), restrictions on the use of Russian and Belarusian airspace for many airlines, the delayed lifting of COVID-related travel restrictions in China and ongoing geopolitical tensions in the Middle East – flight volumes in 2024 surged by 21% compared to 2023 and exceeded pre-pandemic levels by 8%.

Cargo traffic proved notably resilient throughout the 2020-2024 period, consistently remaining above 2019 levels. This was underpinned by sustained demand for goods and medical supplies, particularly in the early stages of the global pandemic, as well as the lack of cargo capacity in the holds of passenger aircraft.

In contrast, passenger traffic faced greater challenges. The combined effects of pandemic-related travel restrictions and the war in Ukraine caused a delayed recovery, with passenger flight volumes only reaching 2019 levels in May 2024.

There is also a clear distinction in the evolution of traffic to/from APAC between countries in the Asian region of ECAC (Armenia, Azerbaijan, Georgia and Türkiye) and the rest of ECAC. Türkiye has expanded its role in the Caucasus leading to increased traffic with countries in the region; and the war in Ukraine has increased the importance of Türkiye and central Asian countries as connecting hubs between Europe, Asia, the Middle East and Russia.

Unsurprisingly, the recovery has varied significantly depending on whether airlines utilise Russian/Belarusian airspace. Operators maintaining access to these routes ended 2024 with flight volumes on average 19% higher than in 2019. In contrast, airlines avoiding Russian airspace posted a 18% decline compared to pre-pandemic levels. The longer distances required to bypass Russian territory have imposed substantial additional costs, leading to reduced flight frequencies and, in some cases, route cancellations—particularly to destinations in Northern Europe.

These disadvantages have resulted in airlines that avoid Russian airspace losing 7% in market share between 2024 and 2019, a figure that rises to 9% when considering passenger traffic alone.