

Air traffic in Latin America and the Caribbean (LAC) grew 4.3% year-on-year in August

In August 2025, total passenger traffic to, from, and within Latin America and the Caribbean reached 40.7 million passengers, an increase of 4.3% compared to August 2024 (equivalent to an additional 1.7 million passengers). Intra-regional traffic accounted for 81% of the net increase, driven mainly by the domestic markets of Brazil, Argentina, and Peru, which contributed more than half of the growth.

Flight frequencies grew by 1.2% year-over-year, while total capacity increased by 2.5%. This outpaced growth in frequencies highlights a shift toward upgauging, with average seats per departure rising from 158 in August 2024 to 160.¹

Indicator Summary

- Capacity measured in available seat-kilometers (ASK) grew 4.7% year-over-year.
- Demand, measured in revenue passenger-kilometers (RPK), increased 4.8% year-over-year.
- The average load factor was 85%.
- In the cumulative January-August period, air traffic in LAC reached 320.6 million passengers, representing 3.8% growth vs. the same period in 2024.

Brazil and Argentina led passenger growth

Brazil was the market that contributed most to regional growth in August, with 973,000 additional passengers (+9.5% year-over-year). The domestic market reached a historic record for August (8.7 million passengers, +8.6%), being the domestic market with the highest growth among the world's six largest, according to IATA². The international segment increased 13.1% year-over-year, supported by a 38% increase in foreign tourist arrivals³.

Argentina, also showed solid performance, with +14.4% year-over-year (domestic +10.6%, international +19.1%). It was the August with the highest traffic in history, exceeding the August 2019 level by 6%. Between January and August, the country accumulated 21.8 million passengers (+14.7%).

Mexico, Colombia, and Chile registered growth below the regional average

Mexico, Colombia, and Chile, which respectively occupy the 2nd, 3rd, and 6th positions in the region by passenger volume, registered a combined growth of only 0.7% year-over-year, well below the regional average.

In **Mexico** total traffic reached 10.2 million passengers (+1.3% year-over-year), with similar increases in both domestic (+1.3%) and international (+1.2%) segments. Traffic with the United States, the third-largest country-pair in the region, grew for the second consecutive month (+0.3% in August) following the June decline, remaining essentially stable in the cumulative January-August period (-0.05% year-over-year).

Colombia presented a slight contraction (-0.1% year-over-year), with 5.06 million passengers. The domestic market fell 3.2%, while the international market increased 4.1%, with significant increases in traffic with Ecuador (+14%), Brazil (+26%), and Peru (+11%). In the cumulative January-August period, the domestic market retreated 1.9% compared to 2024, affected by the decline in Bogotá (-4.9%).

Chile had its first negative result of the year in total passengers in August 2025 (-0.2% year-over-year). Domestic traffic, representing 53% of the total, fell 2.2%, while international traffic increased 2.2% year-over-year. Traffic on secondary domestic routes (without origin/destination in Santiago) grew 3.7% year-over-year, with notable performance on the Antofagasta-Concepción (+33% year-over-year) and Antofagasta-La Serena (+8% year-over-year) routes.

"August data confirms solid growth and a clear trend: connectivity between Latin American countries is today the main driver of air traffic growth. Behind each growth point are thousands of stories: families reuniting, businesses expanding, and communities integrating," said Peter Cerdá, CEO of ALTA.

Peru and Ecuador maintain positive performance

Peru moved 2.6 million passengers (+6.5% year-over-year), with growth in both the domestic (+5.1%) and international (+8.6%) markets, driven by routes to Colombia (+11%), Brazil (+19%), and Dominican Republic (+28%). Ecuador transported 835,000 passengers (+4.2% year-over-year), with strong dynamism in traffic with Colombia (+14%). Total flight supply in Ecuador grew 6.1% year-over-year, with significant increases on routes with Argentina (+94%)⁴.

Panama and Dominican Republic drive growth in Central America and the Caribbean

In **Central America**, traffic to and from the subregion grew 7.0% year-over-year, led by **Panama** (+11.5%, 1.85 million passengers). Followed by **Costa Rica** (+2.2%), **El Salvador** (+0.3%), and **Guatemala** (+2.4%).

In the **Caribbean**, total traffic increased 5.3%, with **Dominican Republic** at the forefront (+6.0%, 1.7 million passengers). **Jamaica** grew 3.6%, while **Cuba** decreased 6.2%. The Caribbean-United States market moved 2.9 million passengers in August (+0.6% year-over-year) and accumulates 22.4 million in January-August 2025 (-1.1% compared to the same period in 2024)⁵.

	August			YTD		
	2025	2024	%Growth	2025	2024	%Growth
Passengers	40.685.970	39.011.467	4,3%	320.557.102	308.843.817	3,8%
Domestic	22.619.274	21.767.113	3,9%	174.039.381	167.349.595	4,0%
International Intra-regional	4.924.908	4.420.562	11,4%	39.044.592	35.444.409	10,2%
International Extra-regional	13.141.789	12.823.792	2,5%	107.473.130	106.049.813	1,3%
RPK (millions)	85.896	81.940	4,8%	681.489	650.286	4,8%
Domestic	21.331	20.537	3,9%	164.489	156.098	5,4%
International Intra-regional	10.376	9.032	14,9%	78.127	69.679	12,1%
International Extra-regional	54.189	52.371	3,5%	438.873	424.509	3,4%
ASK (millions)	100.998	96.499	4,7%	813.701	776.612	4,8%
Domestic	24.803	24.558	1,0%	195.539	188.304	3,8%
International Intra-regional	13.036	11.598	12,4%	99.159	88.139	12,5%
International Extra-regional	63.160	60.343	4,7%	519.004	500.169	3,8%
Load Factor	85.0%	84.9%	+0,1 pp	83.8%	83.7%	+0,1 pp
Domestic	86.0%	83.6%	+2,4 pp	84.1%	82.9%	+1,2 pp
International Intra-regional	79.6%	77.9%	+1,7 pp	78.8%	79.1%	-0,3 pp
International Extra-regional	85.8%	86.8%	-1 pp	84.6%	84.9%	-0,3 pp

Source: ALTA analysis based on data from Civil Aviation Authorities and ALTA estimates based on information reported by member airlines.

Glossary: **RPK (Revenue Passenger Kilometers)**: A measure of traffic calculated by multiplying the number of revenue-paying passengers by the total distance flown. | **ASK (Available Seat Kilometers)**: number of seats available for sale multiplied by distance flown | **Load Factor**: obtained by dividing RPK by ASK.

Methodological Note

In this document, the Latin America and the Caribbean (LAC) region is defined as the aggregate of South America, Central America, the Caribbean, and Mexico. This definition is applied consistently across all regional and international traffic analyses.

Domestic flights are those operated within a single country. **International** traffic is classified into two main segments:

- **International intraregional traffic**: flights between countries within LAC (e.g., Argentina-Brazil or Mexico-Colombia).
- **International extra-regional traffic**: flights between LAC and other world regions (such as North America, Europe, Asia-Pacific, Middle East, or Africa).

¹ ALTA internal analysis based on Cirium SRS Schedules Analyzer data (September 2025 query).

² IATA, Air Passenger Market Analysis – August 2025, IATA Sustainability & Economics

³ Embratur, Painéis de Dados – Chegadas Internacionais, accessed September 26, 2025. Available at: <https://embratur.com.br/para-o-trader/inteligencia-de-dados/paineis-de-dados/chegadas-internacionais/>

⁴ ALTA internal analysis based on Cirium SRS Schedules Analyzer data (September 2025 query).

⁵ U.S. Department of Commerce, International Trade Administration. I-92 International Air Passenger Statistics Dashboard. Accessed September 25, 2025. Available at: <https://www.trade.gov/data-visualization/i92-dashboard-beta>