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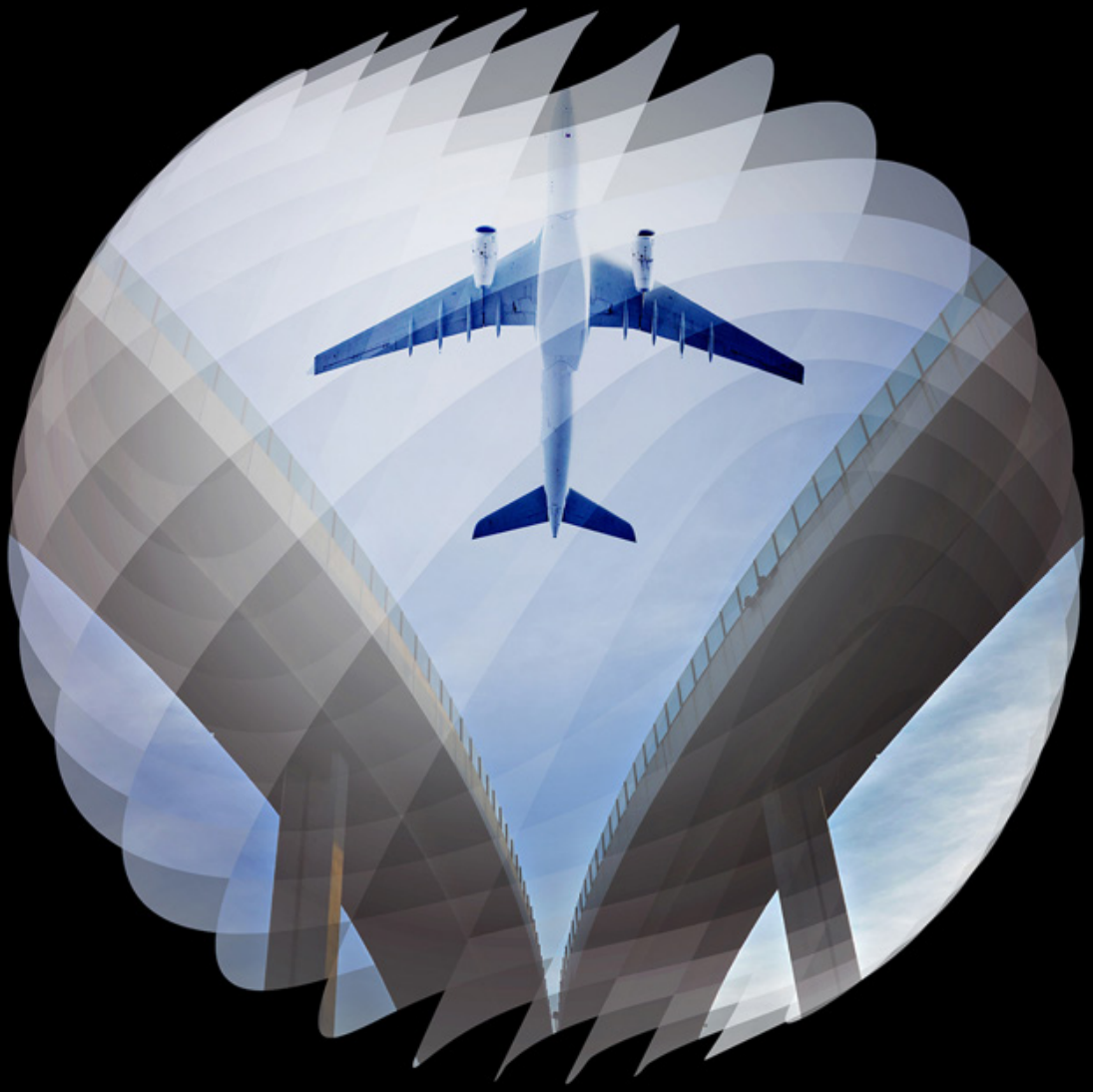


Asia Pacific Aviation Connectivity in 2025

Observations from the Post-Pandemic Recovery

August 2025

Contents

Executive summary

The COVID-19 pandemic and subsequent recovery have profoundly reshaped the air transport network in Asia Pacific, both quantitatively (in the number of unique airport pairs) and qualitatively (in the international vs. domestic balance of those connections and their geographical distribution within the region).

Below is a summary of our key observations from analyzing OAG data:

Our headline finding is that Asia Pacific is far more isolated from the rest of the world than in 2019. Over the last six years (Dec. 2019 to Dec. 2025), Asia Pacific has experienced a gross loss[1] of 1,017 international routes and gained 789 new ones, for a net loss of 228 that erased nearly a quarter of the gains from the previous six years (Dec. 2013 to Dec. 2019). Intra-Asia Pacific routes account for 92% of the losses, and routes between Asia Pacific and the Americas for the majority of the remaining 8%.

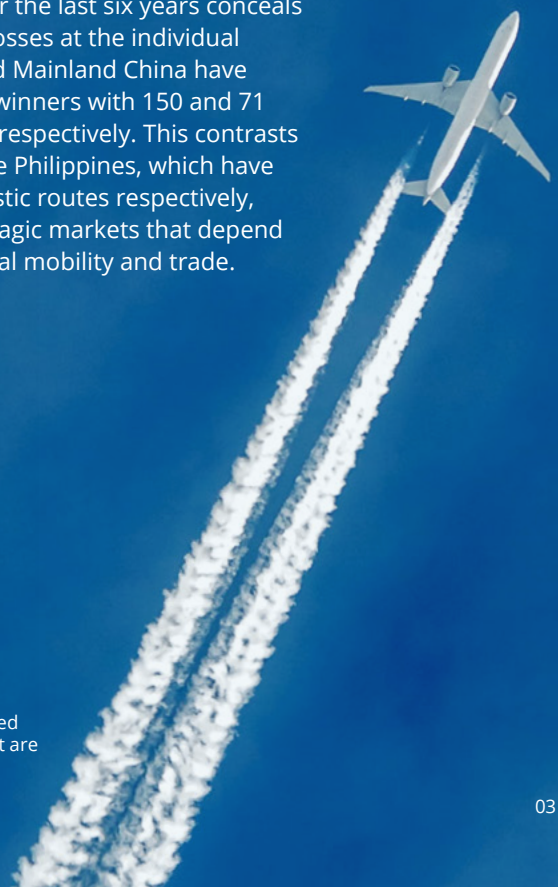
This international network contraction may come as a surprise given the post-COVID traffic recovery. As of 2025, international passenger traffic to, from, and within Asia Pacific (as measured in Revenue-Passenger Kilometers, or RPK) has recovered to a level of 115% of its pre-pandemic baseline. This makes our observation of a shrinking international network seem counterintuitive, unless explained through the lens of an aircraft capacity reallocation toward thicker-yield routes with growing demand.

The Asia Pacific loss of international connectivity is heavily concentrated in just two sub-regions. Airport pairs to, from, and within Northeast Asia account for nearly two-thirds of the gross losses in international routes; Southeast Asia accounts for nearly another third. At an individual market level, the markets that have lost the most international routes are Mainland China (-293 net losses), Thailand (-58), and Cambodia (-52).

Asia Pacific is the only region of the world to have experienced a net contraction of its international network. Considering how fundamental connectivity is to socioeconomic growth, this relative isolation may incur a lasting opportunity cost to the region's tourism income and jobs, cross-border trade, cultural and scientific exchanges, and shared prosperity. For example, Indonesia has lost both international (-20) and domestic (-113) routes, and yet is dependent on air travel given its archipelagic geography.

We observe a relative qualitative shift in Asia Pacific air connectivity from international to domestic. The region has lost 1,573 domestic routes and gained 1,574 new ones between 2019 and 2025, meaning that in aggregate, its domestic network has remained remarkably stagnant for six full years. When compared with the marked contraction in the international network, however, it also means that the domestic network has gained in relative density within the region.

The rebalancing of domestic destinations has been unevenly distributed among Asia Pacific markets. The zero-sum trajectory of the regional domestic network over the last six years conceals significant gains and losses at the individual market level. India and Mainland China have emerged as the clear winners with 150 and 71 new domestic routes, respectively. This contrasts with Indonesia and the Philippines, which have lost 113 and 12 domestic routes respectively, despite being archipelagic markets that depend on air travel for internal mobility and trade.



[1] Gross losses refer to routes that are no longer served, regardless of new routes that have started operating over the same period. Unless explicitly stated, all other losses and gains in this report are expressed in net terms (i.e., the sum of gross losses and gross gains).

Introduction and methodology

This white paper —independently developed by Deloitte based on air travel data provided by OAG— examines how international and domestic commercial aviation networks in Asia Pacific[2] have evolved during two pivotal periods: before (Dec. 2013 to Dec. 2019) and after (Dec. 2019 to Dec. 2025[3]) the onset of the COVID-19 pandemic. The former was characterized by robust market recovery from the 2008 Global Financial Crisis (GFC) and record profitability for the airline industry, fueled by liberalization, macroeconomic tailwinds, rising middle-class demand, and the rapid market share gains of low-cost carriers (LCCs). The latter has been a period of unprecedented disruption, recovery, and recalibration, not just from the pandemic itself but also travel demand reconfiguration, geopolitical turmoil, and supply constraints on aircraft, parts, and manpower.

Through a data-driven analysis of international and domestic airport pairs[4] in Asia Pacific, we uncover the deep structural shifts in the regional fabric of air transport that have taken place over the past 12 years. Our findings complement the extensive commentary that already exists on the impact of COVID-19 on overall passenger and cargo traffic levels and the airline competitive landscape by focusing specifically on the stunning rebalancing of air connectivity from international to domestic and its implications for the Asia Pacific region[5].

We begin this report with an overview of connectivity at a regional level, focusing on changes to international and domestic networks, and a commentary on the balance between LCCs and full-service carriers (FSCs) penetration. We then narrow our analysis to a sub-regional level, covering Southeast Asia, Northeast Asia, Central Asia, South Asia, and Southwest Pacific individually; as well as the top gainers and losers at the individual market level. Each sub-region presents unique dynamics, such as Northeast Asia's muted international reopening, South Asia's explosive domestic growth, and Central Asia's emergence as a strategic connector.

We then turn to connectivity shortfalls and identify the region's top unserved international routes[6] by measuring transfer traffic between behind and beyond destinations that lack a direct nonstop service. Lastly, we conclude with strategic recommendations for airport operators, airlines, and policymakers—outlining how stakeholders can adapt to the new network realities through smarter capacity planning, targeted partnerships, and stronger alignment of their policy frameworks.

It is important to note that this report is intended for general informational purposes only and does not constitute professional advice. The insights and analysis provided are based on publicly available and proprietary data, including OAG schedules and booking data. In particular, the unserved routes analysis reflects a regional-level view informed by available schedules and booking trends at the time of analysis. Given the dynamic nature of airline networks and market conditions, this analysis should not be relied upon for network planning, capacity allocation, investment decisions, or similar purposes. Each airport, airline, and related aviation stakeholder is encouraged to conduct its own tailored assessment, considering its unique market context, commercial strategy, operational capacity, and regulatory environment.

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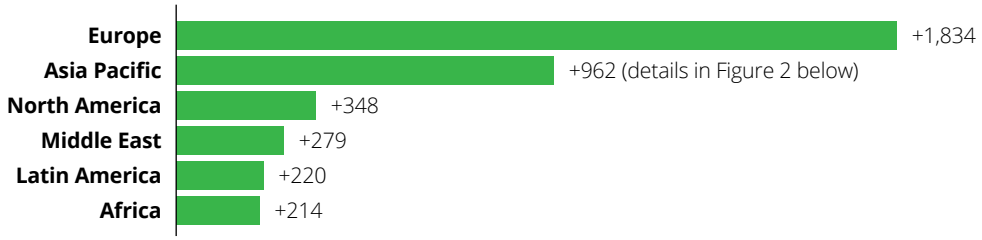
[2] Please refer to the final appendix for a list of Asia Pacific markets by sub-region.
[3] Our study was published in Aug. 2025 but included the winter schedule published ahead by the airlines.
[4] Defined as direct non-stop routes between two airports regardless of directionality (e.g., SIN–MEL and MEL–SIN count as a single airport pair). We excluded those with less than one flight per week to reduce analysis artefacts.
[5] Our analysis only accounts for connectivity and not the frequency at which the routes are being served.
[6] In this report, we use the terms airport pairs and routes interchangeably.

2013–2019: The rapid growth in Asia Pacific connectivity

Changes in international connectivity: Europe and Asia in the lead

From late 2013 (the tail end of the GFC recovery) to late 2019, Asia Pacific experienced the second-largest growth in international connectivity after Europe (see Figure 1). The region added 962 international routes on account of strong economic growth and a rising middle class, whose propensity to fly increased faster than income. The acceleration in regional demand for international travel solidly positioned Asia Pacific as the barycenter of global air traffic growth in the 2010s.

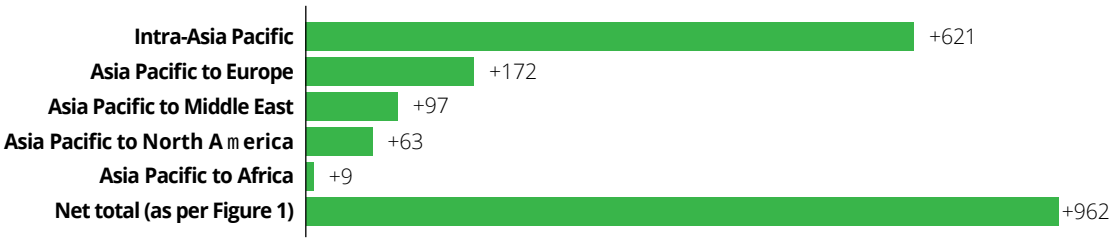
Figure 1: Net change in international airport pairs by region, 2013–2019



Source: OAG

Approximately two-thirds of those 962 international routes added to/from Asia Pacific over the six-year period have been intra-regional (see Figure 2).

Figure 2: Net change in international airport pairs to/from Asia Pacific, 2013–2019



Source: OAG

Zooming in further at a sub-regional level, we observe that most (61%) of the 621 new intra-regional airport pairs added within Asia Pacific were between Northeast Asia and Southeast Asia, and another 23% were between markets within Northeast Asia (see Table 1).

Table 1: Net change in international airport pairs to/from sub-regions in Asia Pacific, 2013–2019

To/from	Southeast Asia	Northeast Asia	Central Asia	South Asia	Southwest Pacific	Total (from Figure 2)
Southeast Asia	18	189	*	14.5	4	
Northeast Asia	189	142	*	4	14	
Central Asia	*	*	-2	0.5	—	621
South Asia	14.5	4	0.5	5	0.5	
Southwest Pacific	4	14	—	0.5	5	
Europe	41	110	8	12	1	172
Middle East	22	15	3	52	5	97
Africa	*	4	2	3	*	9
North America	3	50	1	4	5	63
Latin America	—	1	—	—	-1	*
Total	291.5	529	12.5	95.5	33.5	962

Note: The asterisk (*) denotes no change between 2013 and 2019 and the em dash (—) denotes no airport pair in 2013 and 2019.

Source: OAG

Mainland China emerged as the dominant growth driver, adding a staggering +554 new international airport pairs over this six-year period (see Table 2). This reflects China's strategic push to connect tier-2 cities directly with global destinations, reducing reliance on traditional hubs like Beijing and Shanghai. Thailand (+162), Japan (+137), and Vietnam (+98) also saw substantial increases, benefiting from booming tourism industries and liberalized air service agreements. Markets such as India (+82) and Cambodia (+65) followed closely, marking their growing importance as both source and destination markets in the region. Conversely, markets with the largest declines include Kyrgyzstan (-7), Tajikistan (-7), and Mongolia (-1) (see Table 3).

Table 2: Top 10 markets with the largest growth in international airport pair connectivity

#	To/From	2013 vs. 2019
1	Mainland China	+554
2	Thailand	+162
3	Japan	+137
4	Vietnam	+98
5	Republic of Korea	+85
6	India	+82
7	Cambodia	+65
8	Australia	+46
9	Taiwan	+43
10	Philippines	+41

Source: OAG

Table 3: Top three markets[7] with the largest decline in international airport pair connectivity

#	To/From	2013 vs. 2019
1	Kyrgyzstan	-7
2	Tajikistan	-7
3	Mongolia	-1

Source: OAG

[7] Only three markets recorded decline in international airport pair connectivity between 2013 and 2019.

Changes in domestic connectivity: India and Mainland China in a class of its own

Over the same 2013–2019 period, Asia Pacific also led the expansion in domestic connectivity among all regions worldwide, adding over 2,200 new domestic routes and over six times more than the next fastest-growing market, North America (see Figure 3).

Figure 3: Net change in domestic airport pairs by region, 2013–2019

Source: OAG

This growth was spearheaded by Mainland China (1,592 new domestic airport pairs), India (220), and Indonesia (180), which together accounted for 89% of all new domestic routes opened over the period (see Table 4), further evidencing their rapid air travel development on account of their expanding middle class. Conversely, markets with the largest declines include Pakistan (-17), Mongolia (-5), and New Zealand (-2) (see Table 5).

Table 4: Top 10 markets with the largest growth in domestic airport pair connectivity

#	To/From	2013 vs. 2019
1	Mainland China	+1,592
2	India	+220
3	Indonesia	+180
4	Australia	+72
5	Japan	+68
6	Philippines	+30
7	Sri Lanka	+15
8	Vietnam	+13
9	Maldives	+13
10	Myanmar	+12

Source: OAG

Table 5: Top 5 markets[8] with the largest decline in domestic airport pair connectivity

#	To/From	2013 vs. 2019
1	Pakistan	-17
2	Mongolia	-5
3	New Zealand	-2
4	Tajikistan	-1
5	Uzbekistan	-1

Source: OAG

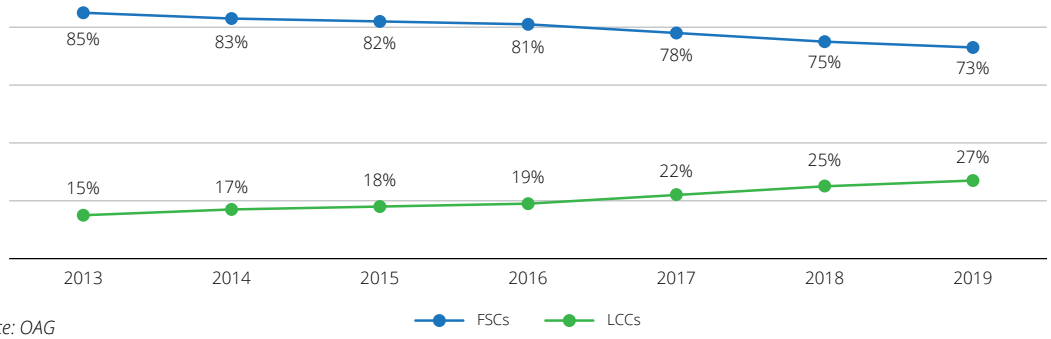
[8] Only five markets experienced a decline in international connectivity.

Qualitative changes in connectivity: The rise of LCCs

Between 2013 and 2019, the rapid expansion of LCCs emerged as a key catalyst for international air connectivity growth across the Asia Pacific region. Unlike traditional FSCs that continued to prioritize hub-and-spoke networks anchored at major gateways, LCCs accelerated market access through a point-to-point approach. This model enabled direct international connections between secondary and even tertiary cities—many of which had previously lacked nonstop service—broadening the region's network reach and reshaping the competitive landscape for airlines.

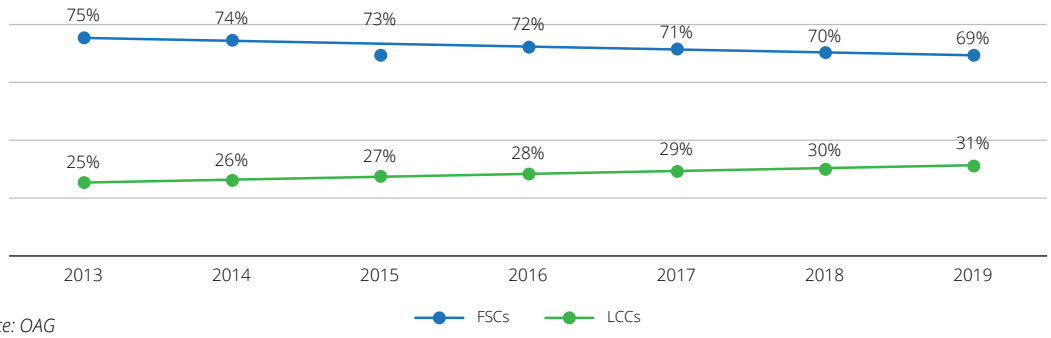
Remarkably, the international seat share capacity of LCCs almost doubled from 15% in 2013 to 27% in 2019 (an 8.8% compound annual growth rate (CAGR) (see Figure 4), while their domestic share (already more established by that point) grew from 25% to 31% (a 3.6% CAGR) (see Figure 5). In combination, LCCs went from providing just over one-fifth of the total seat capacity in Asia Pacific to almost one-third over that six-year pre-pandemic period (see Figure 6). Key enablers of that trend included the liberalization of air service agreements, such as Association of Southeast Asian Nations (ASEAN)'s Open Skies policy, the emergence of a wider middle class able to afford LCC airfares, and the operational flexibility granted by next-generation narrowbody aircraft (e.g., Airbus A320neo, Boeing 737 MAX) that enabled longer regional flights at a competitive cost per available seat-kilometer (CASK).

Figure 4: Share of international seat capacity in Asia Pacific, FSCs vs. LCCs (2013–2019)



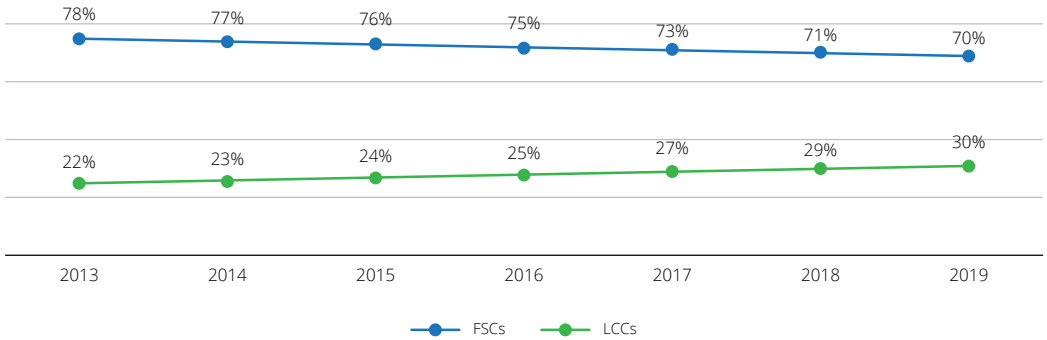
Source: OAG

Figure 5: Share of domestic seat capacity in Asia Pacific, FSCs vs. LCCs (2013–2019)



Source: OAG

Figure 6: Share of combined seat capacity in Asia Pacific, FSCs vs. LCCs (2013–2019)



Source: OAG

The following sub-regional trends illustrate how LCCs, more than just supplementing FSCs capacity, became market shapers by tapping into latent demand, democratizing access to air travel, and extending connectivity beyond the traditional hubs over that period:

- **Southeast Asia to Northeast Asia:** LCCs aggressively expanded cross-border routes linking cities in Thailand, Malaysia, the Philippines, and Indonesia with Mainland China, Republic of Korea, Japan, and Taiwan. These routes catered to both outbound tourism and rising inbound demand from Northeast Asian travelers seeking leisure and cultural destinations.
- **Intra-Asia Expansion:** Across intra-Asia markets, LCCs connected new cities directly, bypassing traditional hubs. Cities like Clark (CRK), Da Nang (DAD), and Fukuoka (FUK) saw new international links, often directly tied to LCC network strategies.
- **South Asia to Southeast Asia:** Indian LCCs increased flights to Bangkok, Kuala Lumpur, and Singapore, serving both tourism and labor migration segments. ASEAN LCCs reciprocated by entering Indian markets.
- **Central Asia to the Middle East and Northeast Asia:** Although LCC penetration was lower in Central Asia, regional and hybrid carriers began adopting LCC-like models to offer affordable travel, particularly to Dubai, Istanbul, and Chinese cities.
- **Limited LCC Impact in Europe–Asia or Transpacific Markets:** Due to range limitations and regulatory complexity, LCCs had minimal impact on long-haul routes during this period, although models like transatlantic flights and services to Europe hinted at potential future disruption.

2019–2025: Unprecedented contraction in Asia Pacific connectivity

Changes in international connectivity: Asia's singular case of route attrition

The COVID-19 pandemic marked the most profound disruption in the history of commercial air transport, greater in magnitude and duration than any previous black swan event. While most regions have largely restored their pre-pandemic route networks, international air connectivity in Asia Pacific has been fundamentally altered, to the point that its current map bears little resemblance to that of 2019.

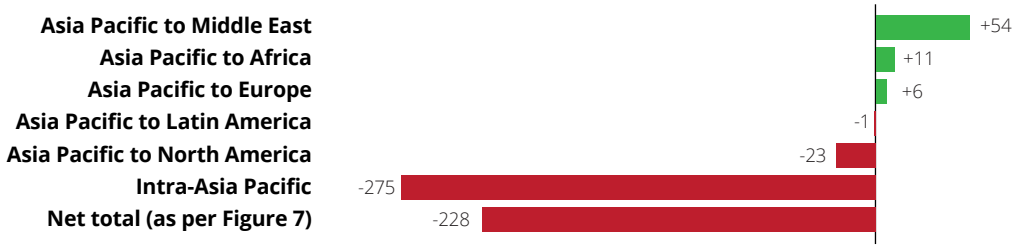
Based on Deloitte's comparative analysis of OAG Schedule data for December 2019 and December 2025, Asia Pacific lost an aggregate of 228 international routes over the six-year period starting with the onset of the COVID-19 pandemic (see Figure 7). As the first region to shut down and one of the last to fully reopen, Asia Pacific remains the only region of the world where international connectivity, measured in aggregate, remains well below pre-pandemic density.

Figure 7: Net change in international airport pairs by region, 2019–2025

Source: OAG

That net loss of 228 international airport pairs conceals some sub-regional variance. Intra-Asia Pacific international routes accounted for most of it with 275 lost airport pairs (see Figure 8 and Table 6 next page). This sharp decline may be explained by the sub-region's historically dense web of short- and medium-haul services, which proved especially vulnerable to prolonged and uncoordinated border closures during the pandemic. Additional losses were observed on routes connecting Asia Pacific to North America (a net reduction of 23 routes), further contributing to the region's overall network contraction. These losses were primarily driven by a decline in long-haul travel demand during the pandemic that did not recover, compounded by sustained capacity reductions from FSCs facing high operating costs and supply chain constraints. Gains in international connectivity to the Middle East (+54), Africa (+11), and Europe (+6) were not sufficient to offset the intra-regional and North American route attrition.

Figure 8: Net change in international airport pairs to/from Asia Pacific, 2019–2025



Source: OAG

Table 6: Net change in international airport pairs to/from sub-regions in Asia Pacific, 2019–2025

To/from	Southeast Asia	Northeast Asia	Central Asia	South Asia	Southwest Pacific	Total (from Figure 8)
Southeast Asia	-6	-107	5	14.5	-1	
Northeast Asia	-107	-88	8	-3	-10.5	
Central Asia	5	8	*	*	—	-275
South Asia	14.5	-3	*	-3	1.5	
Southwest Pacific	-1	-10.5	—	1.5	7	
Europe	-14	-23	39	3	1	6
Middle East	3	12	22	17	*	54
Africa	1	2	2	6	*	11
North America	5	-36	*	3	5	-23
Latin America	—	1	—	—	-2	-1
Total	-99.5	-244.5	76	39	1	-228

Note: The asterisk (*) denotes no change between 2019 and 2025 and the em dash (—) denotes no airport pair in 2019 and 2025.
Source: OAG

Markets such as Uzbekistan (+46) and India (+40) led the growth in international airport pair connectivity. Central Asian Markets—including Kazakhstan and Kyrgyzstan (both +19)—are showing strong gains, suggesting increased integration into global networks (see Table 7). Conversely, markets such as Mainland China (-293) experienced the most severe drop, followed by Thailand (-58), Cambodia (-52), and Taiwan (-52) (see Table 8).

Table 7: Top 10 markets with the largest growth in international airport pair connectivity

#	To/From	2013 vs. 2019
1	Uzbekistan	+46
2	India	+40
3	Kazakhstan	+19
4	Kyrgyzstan	+19
5	Tajikistan	+5
6	Bangladesh	+5
7	Vietnam	+4
8	Mongolia	+3
9	New Zealand	+3
10	Maldives	+2

Source: OAG

Table 8: Top 10 markets with the largest decline in international airport pair connectivity

#	To/From	2013 vs. 2019
1	Mainland China	-293
2	Thailand	-58
3	Cambodia	-52
4	Taiwan	-52
5	Republic of Korea	-33
6	Japan	-27
7	Myanmar	-23
8	Philippines	-23
9	Macao SAR, China	-21
10	Indonesia	-20

Source: OAG

Northeast Asia's increasing isolation

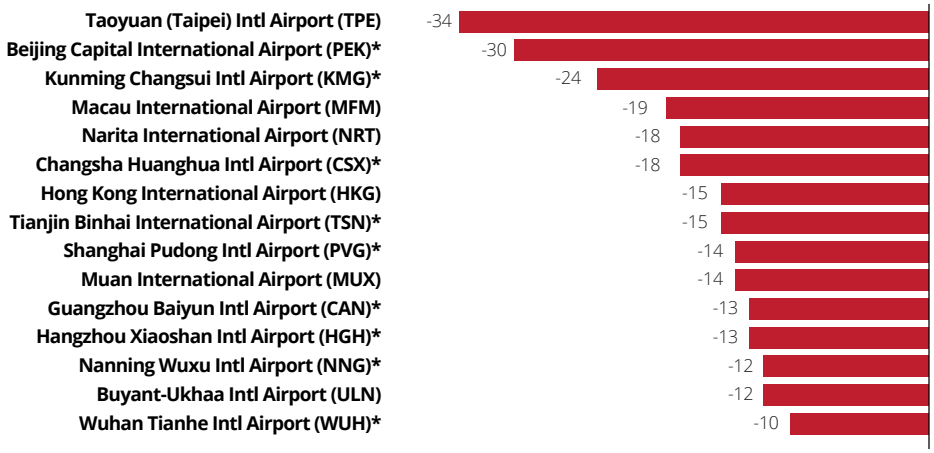
Northeast Asia was the sub-region in Asia Pacific most severely impacted by international air connectivity losses in the post-pandemic period, on account of prolonged border restrictions and a late reopening of Mainland China in particular. Most notably, Northeast Asia lost 214 international airport pairs to/from Southeast Asia, another 88 between markets within itself, 36 transpacific routes to North America, and 23 to Europe (exacerbated by the geopolitical disruptions of airspace). Modest connectivity gains to/from Central Asia and the Middle East are insufficient and the net effect is a contraction of 357 international routes in, out, and within Northeast Asia.

Zooming into Northeast Asia at the individual market level, we see that among of the top 15 airports that have lost the most international routes, nine are located in Mainland China[9]; two in Hong Kong SAR and Macao SAR; three in Japan, Republic of Korea, and Mongolia; and one (with the highest attrition) in Taiwan (see Figure 9). In fact, out of the international airport pairs lost to/from/within Northeast Asia, almost half came from Mainland China alone.

[9] Excluding Chengdu Shuangliu International Airport (CTU) whose route loss is due to traffic relocation to the new Chengdu Tianfu International Airport (TFU) during the study period.

Further examination of this broad-based contraction in Mainland China's international network reveals two key trends. The first is severe attrition of tourism-driven routes to leisure destinations where Chinese outbound tourism, and group tourism in particular, has failed to resume after the reopening of borders. This includes destinations in Thailand (e.g., Krabi, U-Tapao), Australia (e.g., Perth, Darwin), and Cambodia (e.g., Siem Reap, Sihanoukville) in particular. The second is a reduction in direct flights into secondary Chinese cities from major hubs in Europe (e.g., AMS, FRA, LHR), North America (e.g., JFK, DFW, LAX), Asia Pacific (e.g., ICN, SIN, TPE), and Oceania (e.g., MEL, SYD). This reflects a broader shift in network strategy post-pandemic, by which airlines have consolidated international services into tier-1 hubs (e.g., CAN, PEK, PVG), prioritizing efficiency and stable demand while scaling back thinner or leisure-driven routes from smaller cities.

Figure 9: Top 15 Northeast Asia airports by number of lost international routes, 2019–2025



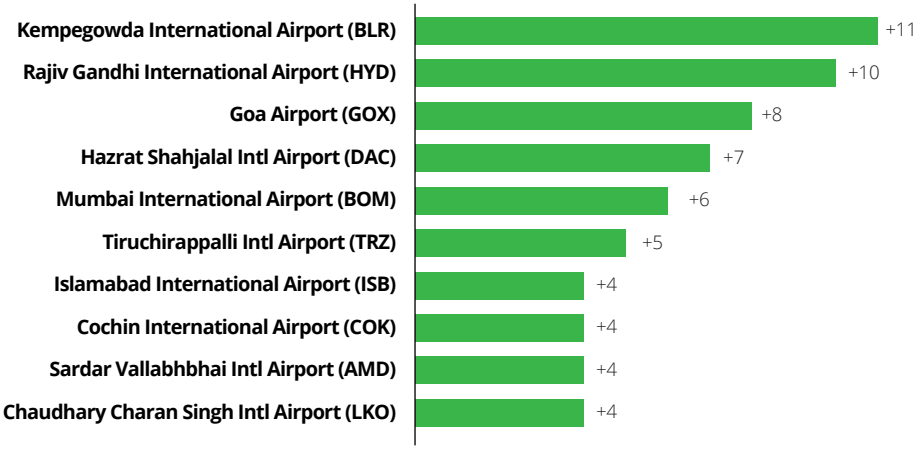
**Airports located in Mainland China*

Source: OAG

Central and South Asia emerging as hotspots of connectivity

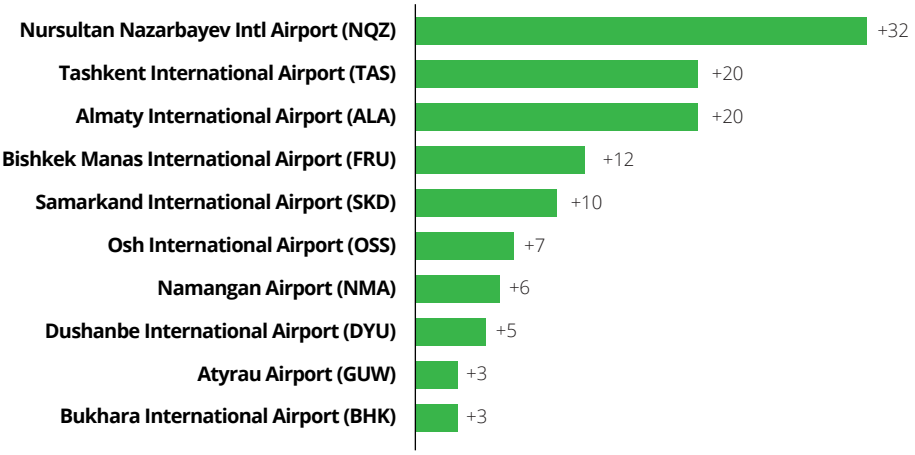
Despite the net losses in international airport pairs observed in Northeast Asia, other sub-regions of Asia Pacific have fared better in the post-pandemic recovery. Central and South Asia have emerged as key engines of international connectivity growth, fueled by expanding diplomatic and economic ties, rising consumer demand, and renewed regional cooperation (see Figure 10 and 11, respectively, for a list of the airports that gained the most international connections). Central Asia saw a surge in new routes to Europe (+39 pairs) and the Middle East (+22) as airlines tapped into emerging city pairs and repositioned operations in response to Russia-related overflight constraints. Meanwhile, South Asia's connectivity with Southeast Asia and the Middle East rebounded strongly, driven by tourism, study travel, labor migration, and expanding bilateral partnerships. These trends highlight the dynamic and adaptive nature of Asia's aviation recovery, with new corridors and previously underserved markets filling the capacity vacuum left by Northeast Asia.

Figure 10: Top 10 South Asia airports by number of gained international routes, 2019–2025



Source: OAG

Figure 11: Top 10 Central Asia airports by number of gained international routes, 2019–2025

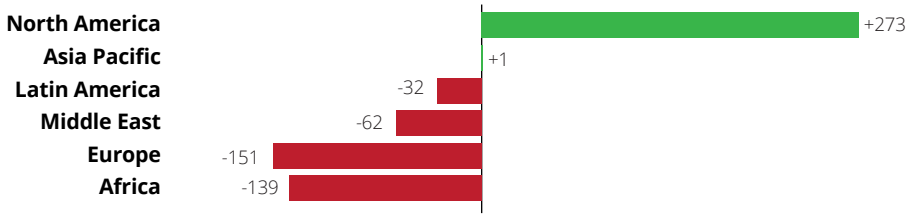


Source: OAG

Changes in domestic connectivity: Six years of stagnation

From 2019 to 2025, North America was the only region of the world to register a meaningful increase in domestic destinations (see Figure 12). Within Asia Pacific, 1,573 domestic routes were lost and 1,574 created, resulting in six years of net stagnation—truly COVID-19's "lost era".

Figure 12: Net change in domestic airport pairs by region, 2019–2025



Source: OAG

Upon closer inspection, however, we observe a more subtle rebalancing of domestic capacity among Asia Pacific markets. India (+150 new airport pairs) and Mainland China (+71) emerged as the top beneficiaries of this reshuffling (see Table 9), as domestic carriers expanded their networks by tapping into secondary and previously underserved airports. These moves reflect a strategic pivot toward capturing rising demand for direct, point-to-point domestic travel. In India, the UDAN (Ude Desh ka Aam Nagrik) scheme provided financial incentives and reduced airport fees to stimulate air connectivity to smaller cities, prompting LCCs to expand aggressively into non-metropolitan markets amid growing demand from first-time flyers and business travelers.

In Mainland China, prolonged international border closures redirected aircraft capacity and passenger demand inward. Government-backed investments in regional airports and subsidies for local routes encouraged airlines to domestically link tier-2 and 3 cities, supported by a still-growing middle class and enhanced intermodal surface infrastructure.

Table 9: Top seven[10] markets with the largest growth in domestic airport pair connectivity

#	To/From	2019 vs. 2025
1	India	+150
2	Mainland China	+71
3	Kazakhstan	+11
4	Maldives	+3
5	Nepal	+3
6	Kyrgyzstan	+1
7	Tajikistan	+1

Source: OAG

[10] Only seven markets recorded domestic connectivity growth between 2019 and 2025.

Notably, Indonesia emerged from the post-pandemic period as the market whose network contracted the most regionally after Mainland China, with a loss of 20 international and 113 domestic connections (see Table 10). In the last six years, Indonesia has lost 63% of the 180 domestic routes it had gained in the previous six years—a striking statistic for a territory whose vast archipelagic geography is only about half served by air transport.

Table 10: Top 10 markets[11] with the largest decline in domestic airport pair connectivity

#	To/From	2019 vs. 2025
1	Indonesia	-113
2	Philippines	-12
3	Japan	-10
4	Pakistan	-10
5	Australia	-10
6	Myanmar	-9
7	Afghanistan	-8
8	Vietnam	-6
9	Thailand	-4
10	Republic of Korea	-4

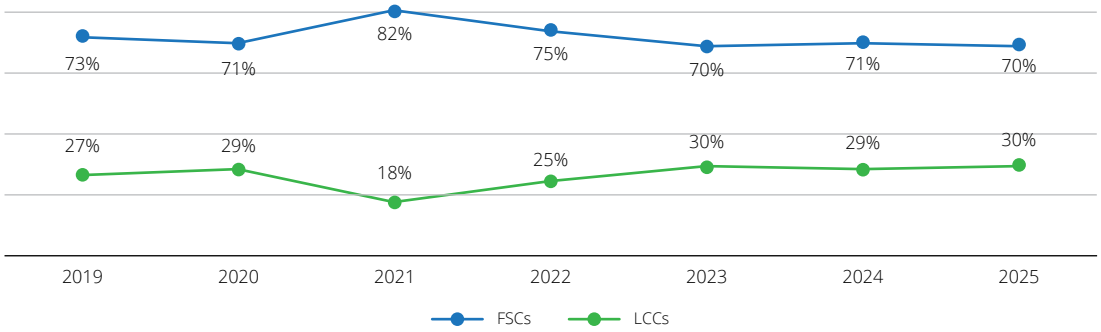
Source: OAG

Qualitative changes in connectivity: LCCs maintain resilience

Between 2019 and 2025, the rebound has been uneven but strategically important—LCCs now make up almost a third of global airline capacity. Their international seat share grew modestly from 27% in 2019 to 30% in 2025 (a 1.8% CAGR) (see Figure 13), underscoring their resilience in short- and medium-haul markets that benefitted from pent-up leisure demand. In the domestic arena, where their presence was already entrenched, LCCs expanded their share from 31% to 33% (a 1.0% CAGR) (see Figure 14), reinforcing their central role in stimulating affordable access within national markets. Although these gains were less dramatic than the surge seen between 2013 and 2019, they reflect the sector's ability to consolidate and maintain relevance through a highly disruptive period. Overall, combined seat capacity of LCCs grew from 30% to 32% (a 1.1% CAGR, see Figure 15).

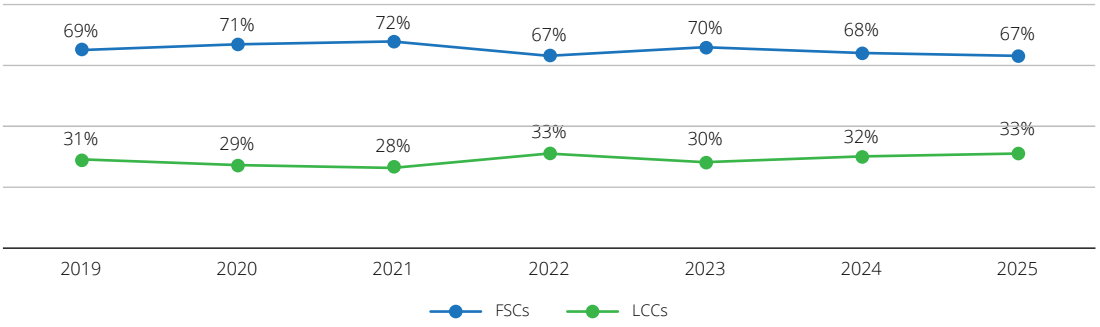
[11] Sri Lanka was excluded (-15 domestic pairs).

Figure 13: Share of international seat capacity in Asia Pacific, FSCs vs. LCCs (2019–2025)



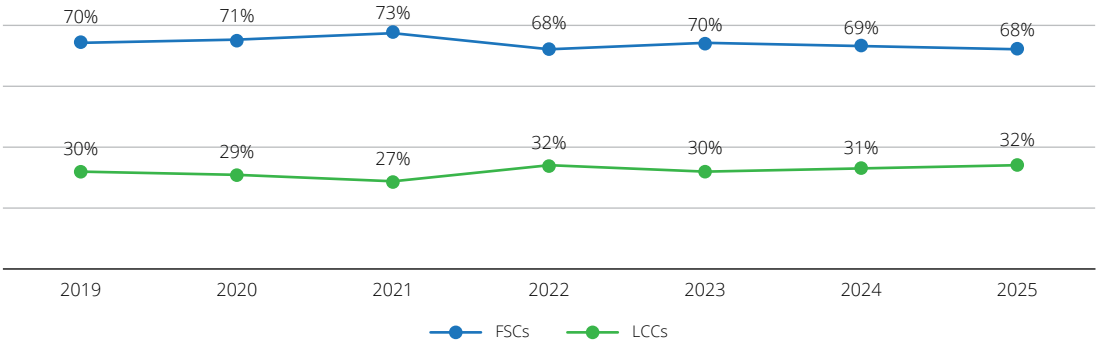
Source: OAG

Figure 14: Share of domestic seat capacity in Asia Pacific, FSCs vs. LCCs (2019–2025)

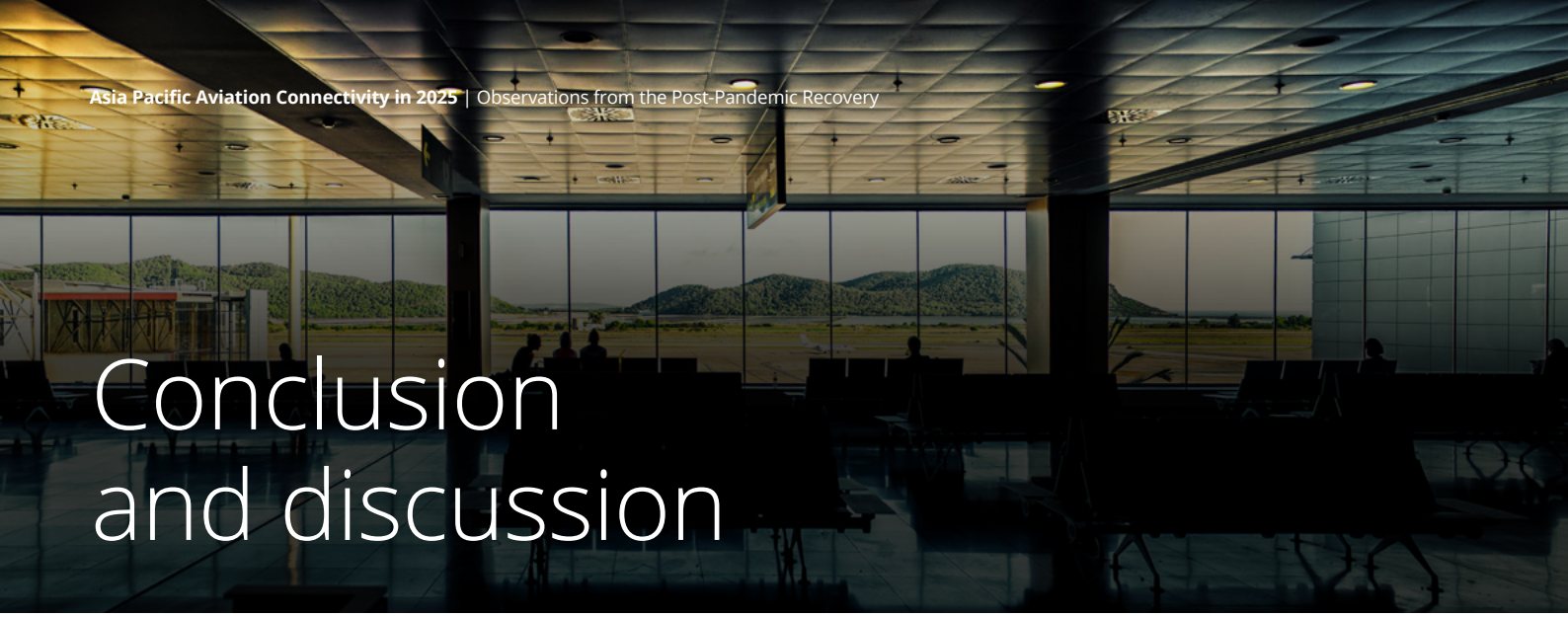


Source: OAG

Figure 15: Share of combined seat capacity in Asia Pacific, FSCs vs. LCCs (2019–2025)



Source: OAG

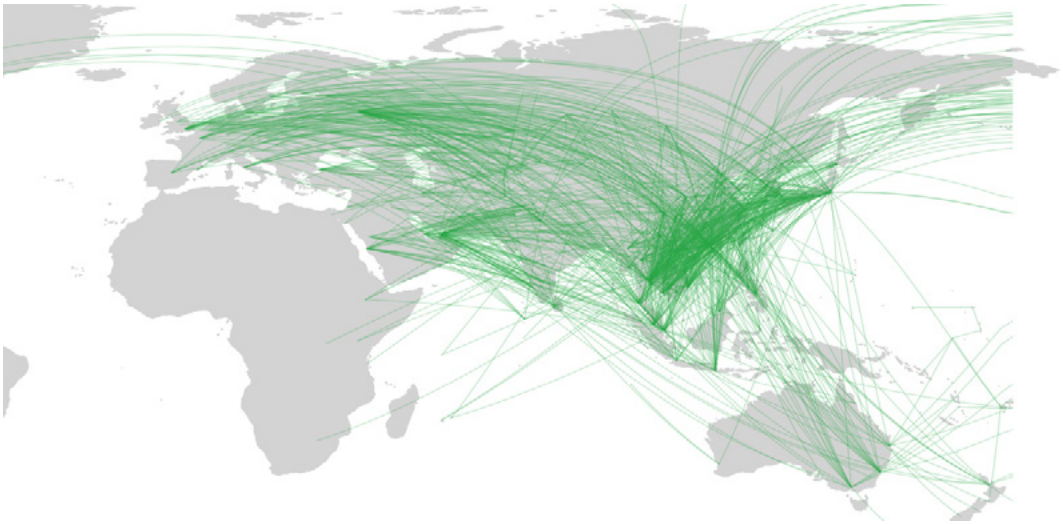


Conclusion and discussion

The recovery of air travel from the COVID-19 pandemic in Asia Pacific paints a contrasted picture. On the demand side, 2024 domestic passenger traffic measured in RPK to, from, and within the region has recovered more strongly (115% of the 2019 level) than international traffic (94%). On the supply side, the opposite is true: the region's international connectivity has shrunk by 228 airport pairs, while domestic connectivity has remained constant.

At a sub-regional and individual market level, however, our analysis reveals how misleading aggregate figures can be. International connectivity from Asia Pacific to the Middle East, Africa, and Europe has improved, but not enough to offset the dramatic losses in intra-regional routes. Among the latter, Northeast Asia (and Mainland China in particular) is responsible for most of the attrition and emerges from the COVID-19 era significantly more isolated from the rest of the world. In conjunction with the increase in international traffic, this finding implies that the growing passenger demand is now concentrated into fewer remaining international routes. This also presents a major challenge to traditional inbound tourism destinations such as Thailand (-58) and the Philippines (-23) that are now less accessible, and highlights the disproportionate amount of international connectivity loss incurred to, from, and within Asia Pacific in the last six-year period relative to the pre-pandemic period (see Figure 16 and 17).

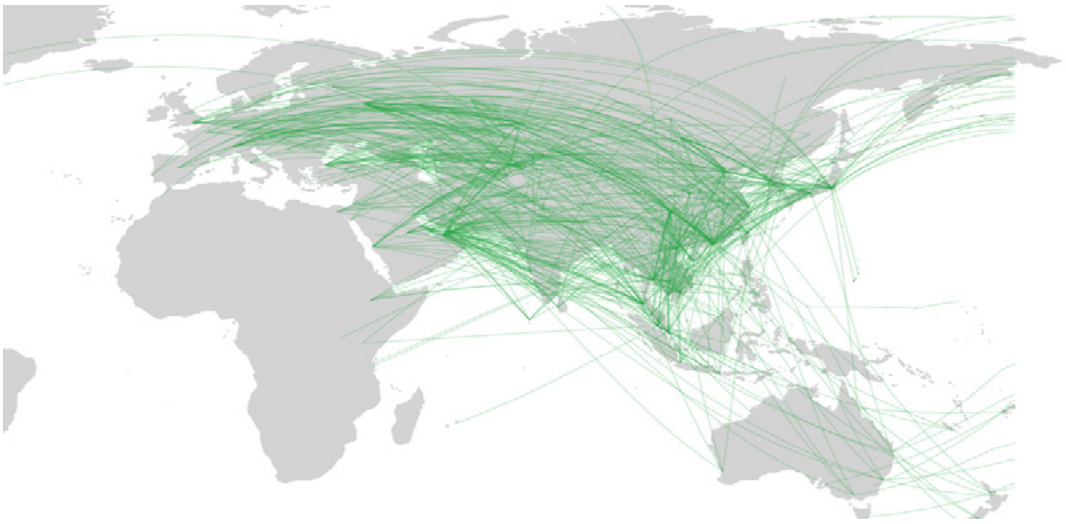
Figure 16: International routes gained (+1,253, in green) and lost (-291, in red) to, from, and within Asia Pacific over the 2013–2019 period (for a net gain of 962)



Source: OAG

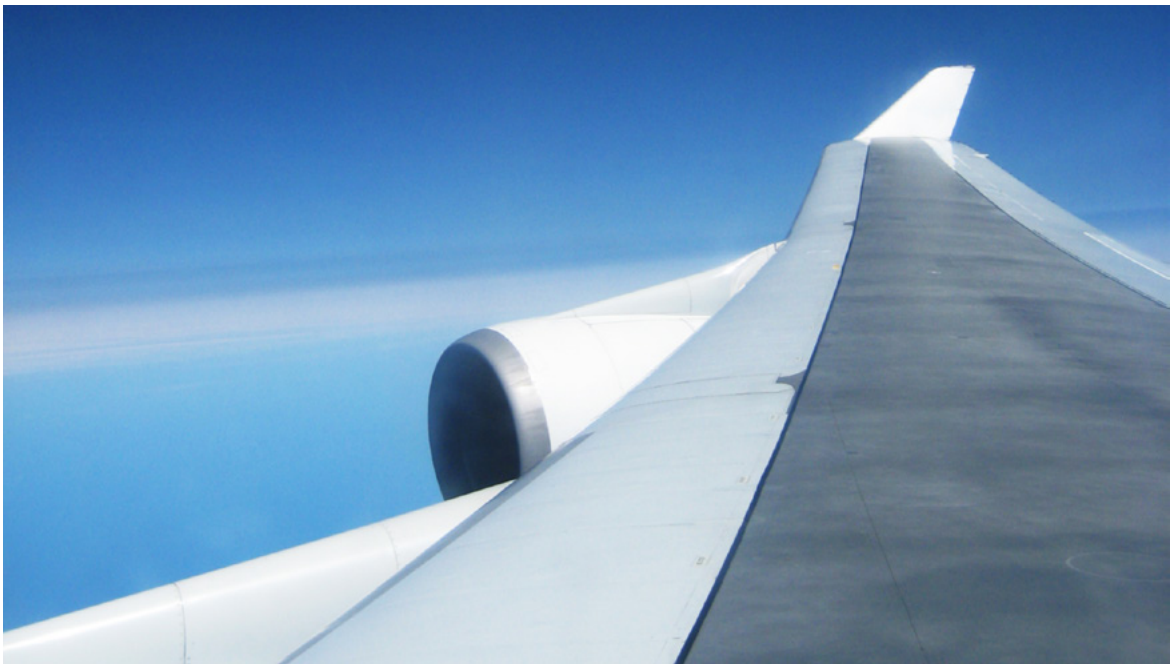
Source: OAG

Figure 17: International routes gained (+1,017, in green) and lost (-789, in red) to, from, and within Asia Pacific over the 2019–2025 period (for a net loss of -228)



Source: OAG

Source: OAG



Similarly, the apparent stagnation in domestic connectivity conceals significant gains in certain Asia Pacific markets commensurate with losses in others. The connectivity rebalancing is positive news for secondary and tertiary cities in markets that have emerged as buoyant domestic markets, such as India and Mainland China, where travelers now have access to a wider offering of domestic destinations. It is, however, challenging the national air travel markets of Indonesia (-113) and the Philippines (-12), which have emerged as having lost the most domestic routes despite their archipelagic geography being dependent on air connectivity.

Our analysis concludes the following:

- Hospitality companies can capitalize on the robust growth in domestic travel in India and Mainland China to expand their offerings to additional secondary and tertiary cities that were previously underserved, with the added comfort that they are not relying on volatile foreign inbound tourism to be successful.
- Leisure markets that have lost international connectivity must work harder to revitalize inbound flows, through a combination of strategic partnerships between tourism authorities, airports, airlines, and hospitality providers, to compete with growing domestic offerings in the origin markets.
- In an era of scarce aircraft capacity and no short-term relief on the horizon to the aircraft manufacturers' supply chain woes, the bar is simply higher for airlines to decide on allocating their limited capacity, and the thicker-yield routes will continue to prevail for the foreseeable future.
- Traditional incentives to air services development (such as rebates on landing fees) are no longer sufficient. Airports need to invest and work with local partners on the attractiveness of their facilities and destination to build compelling business cases that will attract airlines.
- Our unserved routes analysis suggests that there are still multiple opportunities to restore international connectivity through a careful network strategy, code sharing, and optimized fleet deployments that take advantage of the newer narrowbody long-range aircraft models.
- Most importantly, at the regional level, stronger multilateral collaboration and cooperation on passenger and visa facilitation, as well as broader open skies and air service agreements will be essential to removing the traditional roadblocks that put Asia Pacific at a disadvantage relative to more integrated air travel markets such as Europe and North America.

Appendix — Sub-regional focus

Southeast Asia

Summary

Southeast Asia's aviation industry is poised for robust growth, with the International Air Transport Association (IATA) expecting emerging economies such as Vietnam and Indonesia to lead it. The momentum is fueled by a rising middle class and the region's unique geography (comprising numerous islands that make overland travel challenging) resulting in strong demand for intra-regional air connectivity.

Between 2013 and 2019, Southeast Asia saw a net gain in international airport pairs across several key markets, particularly with Northeast Asia (+378 pairs).

Between 2019 and 2025, Southeast Asia lost 188 international airport pairs—primarily due to a sharp decline in connectivity with Mainland China.

Southeast Asia's recovery has been slow due to the absence of Chinese outbound travelers, while airlines have shifted focus to long-haul markets—boosting seat capacity to North America, the Southwest Pacific, Middle East, and Africa.

An analysis of Southeast Asia's top unserved routes highlights market-specific trends and opportunities to reinstate suspended services, particularly in more mature markets. Additionally, there is growing potential for the development of new long-haul routes to Europe and North America.

Prior to the COVID-19 pandemic, Southeast Asia was one of the fastest-growing aviation markets globally, benefiting from rising middle-class demand, liberalized air services, and the rapid expansion of LCCs.

Between 2013 and 2019, the region experienced strong gains in international connectivity, adding hundreds of airport pairs—most notably with Northeast Asia (+378), South Asia (+29), and Europe (+41). Intra-Southeast Asia connectivity also expanded, with 18 new airport pairs established. However, this period of growth gave way to a sharp contraction after the onset of the pandemic.

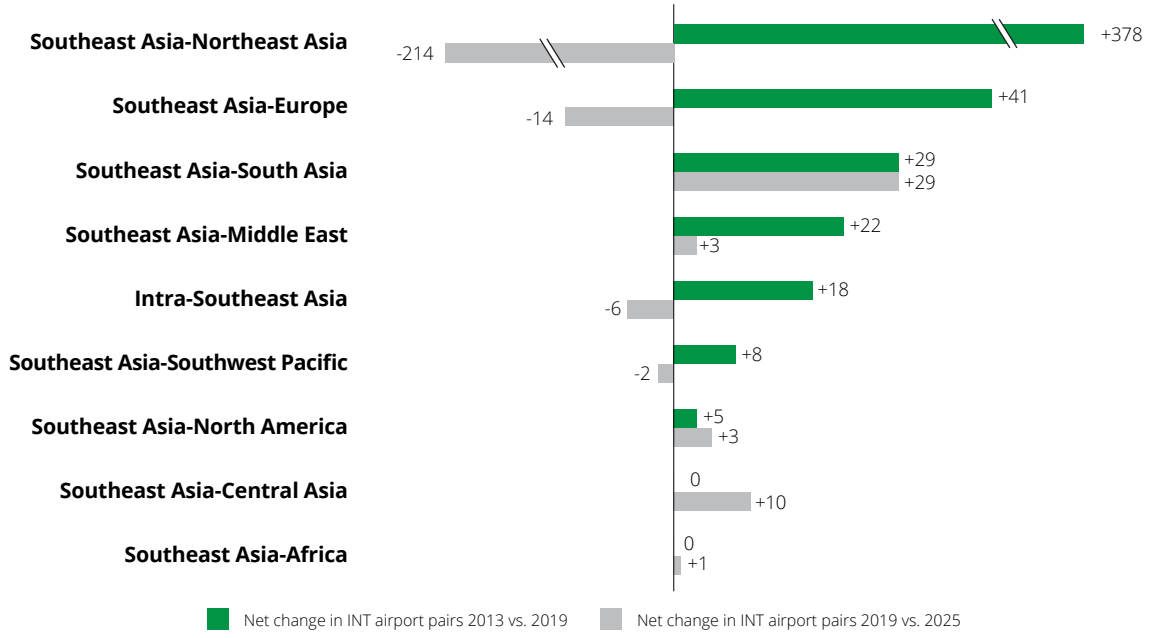
Southeast Asia air travel experienced a slow and uneven recovery from the COVID-19 pandemic. Between 2019 and 2025, the region lost 188 international airport pairs, revealing the depth of the pandemic's impact and the region's heavy reliance on Northeast Asian travel demand—particularly from Mainland China. Connectivity with Northeast Asia fell sharply by 214 pairs, reversing much of the growth seen in the previous six years. Intra-Southeast Asia connections declined slightly, losing six airport pairs between 2019 and 2025, and routes with Europe dropped by 14. Connectivity with the Southwest Pacific dropped by two connections, while Africa saw a modest gain of one. In contrast, there were small but meaningful increases in airport pairs to North America (+3), the Middle East (+3), Central Asia (+10), and South Asia (+29), signaling a gradual diversification of network strategies (see Figure 18).

At the market level, the contrast between pre- and post-pandemic trends is stark. Between 2013 and 2019, all major Southeast Asian markets gained international connections—led by Thailand (+162), Vietnam (+98), and Cambodia (+65).

However, between 2019 and 2025, Thailand (–58), Cambodia (–52), the Philippines (–23), and Myanmar (–23) saw the largest declines. In contrast, Vietnam (+4), Lao PDR (+1), Singapore and Brunei Darussalam (–4) demonstrated greater resilience or stabilization, reflecting more balanced recovery trajectories (see Figure 19).

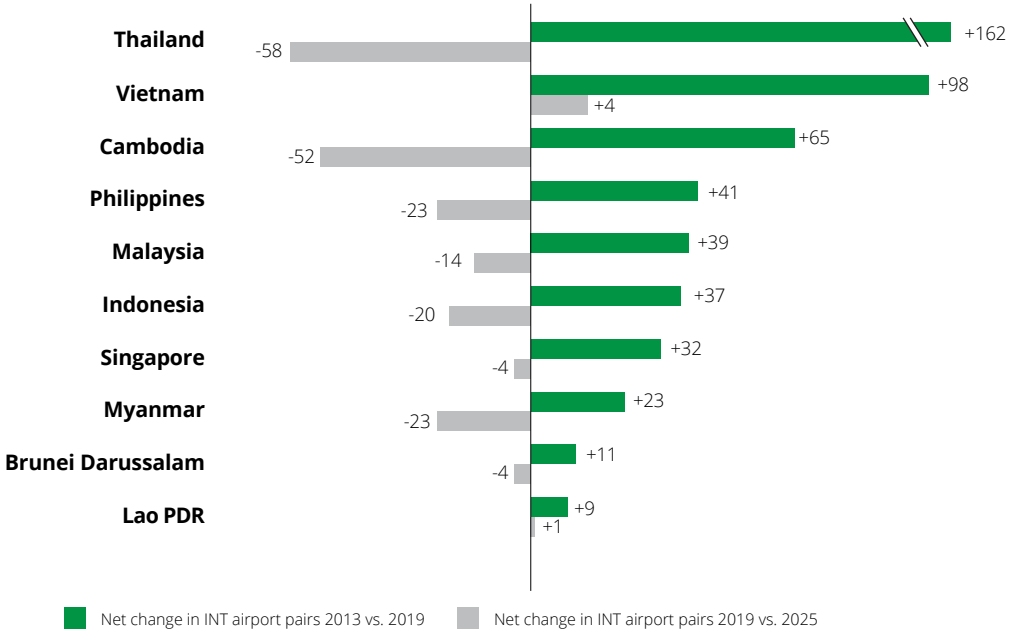
Taken together, the data suggests that while Southeast Asia's international aviation network grew significantly in the years leading up to the pandemic, much of that growth has since been erased—especially in Northeast Asia. Nonetheless, strategic gains in long-haul and emerging markets point to a slow but ongoing shift toward more diversified and resilient connectivity.

Figure 18: Southeast Asia's net change in international airport pairs by region, 2013-2019 and 2019-2025



Source: OAG

Figure 19: Southeast Asian markets' net change in international airport pairs, 2013-2019 and 2019-2025



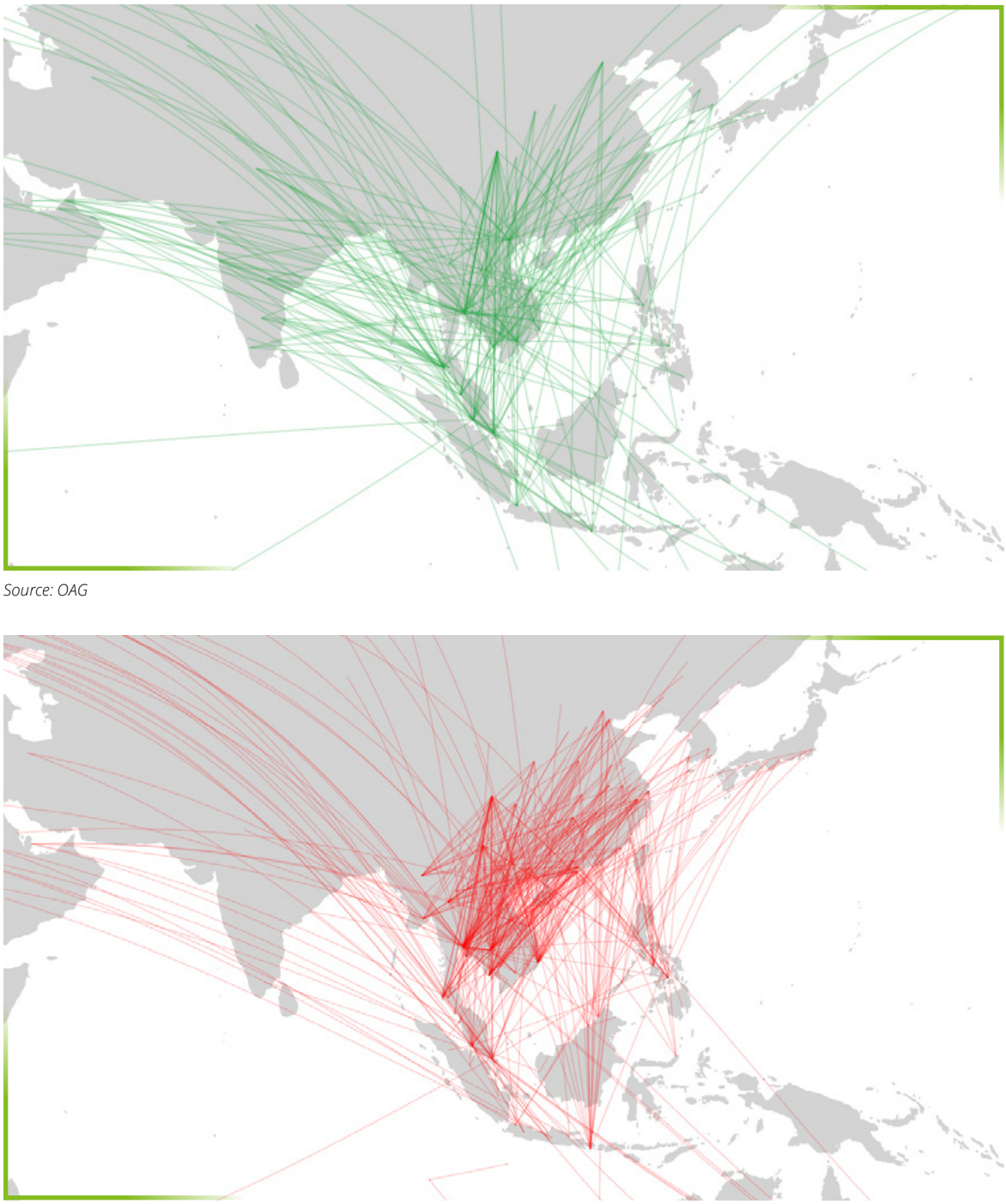
Source: OAG

Figure 20: International routes gained (+572, in green) and lost (-73, in red) to, from, and within Southeast Asia over the 2013–2019 period (for a net gain of 499)

Source: OAG

Source: OAG

Figure 21: International routes gained (+242, in green) and lost (-430, in red) to, from, and within Southeast Asia over the 2019–2025 period (for a net loss of 188)



Source: OAG

Source: OAG

Insights Based on Scheduled Seat Data

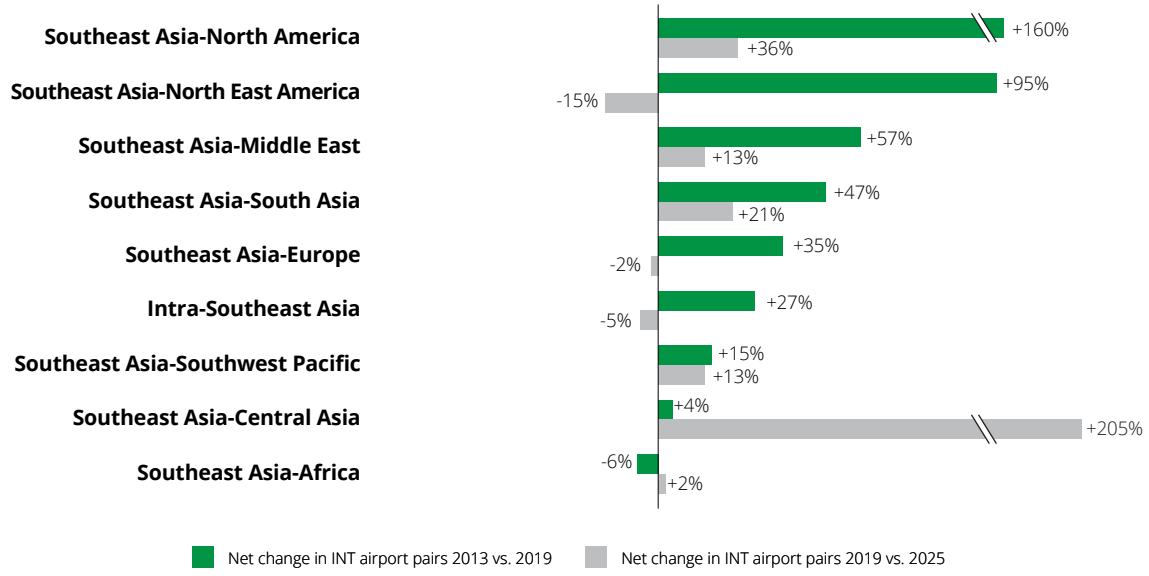
While international connectivity in Southeast Asia has gradually improved, the region's full recovery has been hampered by the prolonged absence of Chinese outbound travelers. This is particularly evident in the decline in international seat capacity on intra-Asia routes with more than one weekly flight. Many Southeast Asian destinations had previously relied heavily on Chinese tourism, and the slow return of this market has delayed the restoration of regional traffic levels.

Seat capacity on intra-Asian routes, which had grown by 27% between 2013 and 2019, contracted by 5% between 2019 and 2025. This drop underscores the continued challenges in short- and medium-haul travel within the region and highlights Southeast Asia's vulnerability to shifts in regional demand.

In contrast, there has been sustained growth in seat capacity to long-haul markets. Between 2019 and 2025, Southeast Asia–North America seat capacity grew by 36%, following a 160% surge in the previous period. Seat capacity with the Southwest Pacific and the Middle East also continued to expand, each growing by 13% since 2019, indicating a strategic reorientation by carriers toward more resilient and diversified markets. Notably, even Southeast Asia–Africa routes, which had contracted prior to the pandemic, saw a modest 2% increase in seat capacity (see Figure 22).

However, growth to Europe stalled slightly, with a 2% decline in seats from 2019 to 2025, suggesting a stabilization or rebalancing of seat capacity rather than continued expansion.

Figure 22: Southeast Asia's net change in international seat capacity by region, 2013-2019 and 2019-2025



Source: OAG

Top Unserved International Routes (Select Markets)

An analysis of unserved international routes was conducted by comparing average one-way Origin-Destination (OD) demand—which measures passenger volumes (measured in PDEW) between two airports regardless of transit points—with direct schedule data from OAG. This method identified the top unserved routes for each Southeast Asian market, revealing markets with strong demand but no existing nonstop service. Key findings include:

- Long-haul markets Asia-Europe and Asia-United States (U.S.) emerged as critical for markets such as Malaysia, the Philippines, and Thailand, reflecting continued demand for transcontinental connectivity.
- Singapore is already well-connected internationally, with the next phase of growth expected to target unserved primary and secondary gateways.
- Many of Malaysia's top unserved routes were previously operated, suggesting that the immediate focus should be on restoring these suspended services rather than launching entirely new ones.
- Brunei, Lao PDR, and Myanmar continue to exhibit relatively underdeveloped international networks. Many of their underserved routes currently lack the passenger volumes required to support viable direct services in the near term.

Brunei Darussalam

Rank	Airport Code	Airport Name, City	Market	PDEW
1	DPS*	I Gusti Ngurah Rai International Airport, Bali	Indonesia	14
2	LHR*	London Heathrow Airport, London	United Kingdom	12
3	DAC	Hazrat Shahjalal International Airport, Dhaka	Bangladesh	11
4	KTM	Tribhuvan International Airport, Kathmandu	Nepal	8
5	BNE*	Brisbane Airport, Brisbane	Australia	7
6	DEL	Indira Gandhi International Airport, Delhi	India	5
7	PER	Perth Airport, Perth	Australia	4
8	PVG*	Shanghai Pudong International Airport, Shanghai	Mainland China	4
9	HAN*	Noi Bai International Airport, Hanoi	Vietnam	3
10	PNH	Phnom Penh International Airport, Phnom Penh	Cambodia	3

Note: The asterisk (*) denotes a destination that was previously served, but is now unserved as of 2025.

Source: OAG

Cambodia

Rank	Airport Code	Airport Name, City	Market	PDEW
1	CDG	Charles de Gaulle Airport, Paris	France	127
2	MEL	Melbourne Airport, Melbourne	Australia	82
3	KIX*	Osaka Kansai International Airport, Kansai	Japan	63
4	PUS*	Gimhae International Airport , Busan	Republic of Korea	57
5	LAX	Los Angeles International Airport, Los Angeles	U.S.	56
6	SYD	Sydney Kingsford Smith Airport, Sydney	Australia	53
7	LHR	London Heathrow Airport, London	United Kingdom	50
8	DXB	Dubai International Airport, Dubai	UAE	45
9	NGO	Nagoya Chubu Centrair International Airport, Nagoya	Japan	37
10	HND	Tokyo International (Haneda), Tokyo	Japan	35

Note: The asterisk (*) denotes a destination that was previously served, but is now unserved as of 2025.

Source: OAG

Indonesia

Rank	Airport Code	Airport Name, City	Market	PDEW
1	CDG*	Charles de Gaulle Airport, Paris	France	407
2	KIX*	Osaka Kansai International Airport, Kansai	Japan	381
3	LHR*	London Heathrow Airport, London	United Kingdom	334
4	FRA	Frankfurt Airport, Frankfurt	Germany	237
5	LAX	Los Angeles International Airport, Los Angeles	U.S.	168
6	MXP	Milan Malpensa Airport, Milan	Italy	149
7	AMD*	Sardar Vallabhbhai Patel International Airport , Ahmedabad	India	147
8	NGO*	Nagoya Chubu Centrair International Airport, Nagoya	Japan	137
9	MUC	Munich International Airport, Munich	Germany	120
10	ZRH	Zurich Airport, Zurich	Switzerland	117

Note: The asterisk (*) denotes a destination that was previously served, but is now unserved as of 2025.

Source: OAG

Lao PDR

Rank	Airport Code	Airport Name, City	Market	PDEW
1	CDG*	Charles de Gaulle Airport, Paris	France	28
2	NRT	Tokyo Narita International Airport, Tokyo	Japan	24
3	CTU*	Chengdu Shuangliu International Airport, Chengdu	Mainland China	18
4	CGK*	Jakarta Soekarno-Hatta Airport, Jakarta	Indonesia	17
5	SYD	Sydney Kingsford Smith Airport, Sydney	Australia	13
6	MNL*	Manila Ninoy Aquino International Airport, Manila	Philippines	13
7	CGO*	Zhengzhou Xinzheng International Airport, Zhengzhou	Mainland China	12
8	NKG	Nanjing Lukou International Airport, Nanjing	Mainland China	12
9	TNA	Jinan Yaoqiang International Airport, Jinan	Mainland China	12
10	KIX	Osaka Kansai International Airport, Kansai	Japan	11

Note: The asterisk (*) denotes a destination that was previously served, but is now unserved as of 2025.

Source: OAG

Malaysia

Rank	Airport Code	Airport Name, City	Market	PDEW
1	ZRH	Zurich Airport, Zurich	Switzerland	76
2	FRA*	Frankfurt Airport, Frankfurt	Germany	75
3	SHA	Shanghai Hongqiao International Airport, Shanghai	Mainland China	69
4	MXP	Milan Malpensa Airport, Milan	Italy	65
5	TNA*	Jinan Yaoqiang International Airport, Jinan	Mainland China	64
6	CTU*	Chengdu Shuangliu International Airport, Chengdu	Mainland China	60
7	SHE	Shenyang Taoxian International Airport, Shenyang	Mainland China	60
8	AMM*	Amman Queen Alia International Airport, Amman	Jordan	58
9	MAN*	Manchester Airport, Manchester	United Kingdom	57
10	NGO*	Nagoya Chubu Centrair International Airport, Nagoya	Japan	52

Note: The asterisk (*) denotes a destination that was previously served, but is now unserved as of 2025.

Source: OAG

Myanmar

Rank	Airport Code	Airport Name, City	Market	PDEW
1	NRT*	Tokyo Narita International Airport, Toky	Japan	57
2	HND	Tokyo International (Haneda), Tokyo	Japan	38
3	KIX*	Osaka Kansai International Airport, Kansai	Japan	32
4	MCT	Muscat International Airport, Muscat	Oman	27
5	PVG*	Shanghai Pudong International Airport, Shanghai	Mainland China	26
6	PUS	Gimhae International Airport , Busan	Republic of Korea	22
7	FUK	Fukuoka Airport, Fukuoka	Japan	20
8	HKG*	Hong Kong International Airport, Hong Kong	Hong Kong SAR, China	19
9	NGO	Nagoya Chubu Centrair International Airport, Nagoya	Japan	18
10	HGH*	Hangzhou International Airport, Hangzhou	Mainland China	15

Note: The asterisk (*) denotes a destination that was previously served, but is now unserved as of 2025.

Source: OAG

Philippines

Rank	Airport Code	Airport Name, City	Market	PDEW
1	LHR*	London Heathrow Airport, London	United Kingdom	420
2	AMS*	Schiphol Airport, Amsterdam	Netherlands	176
3	ORD	Chicago O'Hare International Airport, Chicago	U.S.	159
4	MXP	Milan Malpensa Airport, Milan	Italy	151
5	YYC	Calgary International Airport, Calgary	Canada	143
6	FCO*	Rome Fiumicino Airport, Rome	Italy	134
7	AKL*	Auckland International Airport, Auckland	New Zealand	130
8	IAH	George Bush Intercontinental Airport, Houston	U.S.	123
9	YEG	Edmonton International Airport, Edmonton	Canada	121
10	FRA*	Frankfurt Airport, Frankfurt	Germany	117

Note: The asterisk (*) denotes a destination that was previously served, but is now unserved as of 2025.

Source: OAG

Singapore

Rank	Airport Code	Airport Name, City	Market	PDEW
1	CGQ	Changchun Longjia International Airport, Changchun	Mainland China	91
2	HRB*	Harbin Taiping International Airport, Harbin	Mainland China	79
3	BER*	Berlin Brandenburg Airport, Berlin	Germany	74
4	DLC	Dalian Zhoushuizi International Airport, Dalian	Mainland China	62
5	IAH	George Bush Intercontinental Airport, Houston	U.S.	55
6	YYZ	Toronto Pearson International Airport, Toronto	Canada	54
7	MAD	Madrid Adolfo Suarez-Barajas Airport, Madrid	Spain	51
8	SRG*	Jenderal Ahmad Yani Airport, Semarang	Indonesia	50
9	GVA	Geneva Airport, Geneva	Switzerland	49
10	URC	Ürümqi Diwopu International Airport, Ürümqi	Mainland China	49

Note: The asterisk (*) denotes a destination that was previously served, but is now unserved as of 2025.

Source: OAG

Thailand

Rank	Airport Code	Airport Name, City	Market	PDEW
1	LAX	Los Angeles International Airport, Los Angeles	U.S.	272
2	BER	Berlin Brandenburg Airport, Berlin	Germany	170
3	SFO	San Francisco International Airport, San Francisco	U.S.	163
4	JFK	John F. Kennedy International Airport, New York	U.S.	162
5	DUS*	Duesseldorf International Airport, Duesseldorf	Germany	155
6	BCN	Barcelona Airport, Barcelona	Spain	144
7	CTU*	Chengdu Shuangliu International Airport, Chengdu	Mainland China	132
8	GVA	Geneva Airport, Geneva	Switzerland	121
9	HAM*	Hamburg Airport, Hamburg	Germany	121
10	DLC*	Dalian Zhoushuizi International Airport, Dalian	Mainland China	117

Note: The asterisk (*) denotes a destination that was previously served, but is now unserved as of 2025.

Source: OAG

Vietnam

Rank	Airport Code	Airport Name, City	Market	PDEW
1	LAX*	Los Angeles International Airport, Los Angeles	U.S.	453
2	YYZ*	Toronto Pearson International Airport, Toronto	Canada	169
3	AMS*	Schiphol Airport, Amsterdam	Netherlands	141
4	IAH*	George Bush Intercontinental Airport, Houston	U.S.	139
5	JFK	John F. Kennedy International Airport, New York	U.S.	139
6	SHA	Shanghai Hongqiao International Airport, Shanghai	U.S.	110
7	SEA	Seattle-Tacoma International Airport, Seattle	U.S.	107
8	YVR*	Vancouver International Airport, Vancouver	Canada	100
9	BER	Berlin Brandenburg Airport, Berlin	Germany	92
10	IAD*	Washington Dulles International Airport, Washington, D.C.	U.S.	88

Note: The asterisk (*) denotes a destination that was previously served, but is now unserved as of 2025.

Source: OAG

Using OAG's booking data, we analyzed passenger itineraries to identify key connecting hubs for routes that were previously served but are now unserved. The tables below highlight the top three connecting airports by destination region, along with the share of OD demand each hub captures. OD demand refers to the total number of passengers traveling between two cities or airports, regardless of the route or connections they take.

Destination's region	Percentage of total region flow demand (%)		
	1st connecting airport	2nd connecting airport	3rd connecting airport
Northeast Asia	PVG (14%)	CAN (10%)	HKG (10%)
Europe	DOH (17%)	DXB (15%)	SIN (13%)
Middle East	DOH (34%)	BKK (20%)	DXB (13%)
North America	TPE (31%)	HKG (16%)	ICN (8%)
South Asia	SIN (31%)	SGN (18%)	KUL (17%)
Southwest Pacific	SIN (25%)	SYD (19%)	HKG (5%)

Source: OAG

For Europe and the Middle East, Gulf carriers dominate, with Doha (DOH) and Dubai (DXB) capturing the largest demand shares. In Northeast Asia and North America, major East Asian hubs like Shanghai (PVG), Taipei (TPE), and Hong Kong (HKG) serve as key gateways. Meanwhile, Singapore (SIN) remains a critical hub for connections to South Asia and the Southwest Pacific, reflecting its strong regional positioning.

Appendix — Sub-regional focus

Northeast Asia

Summary

The sharp reduction in flights between major markets such as Mainland China and the U.S. has had regional ripple effects, prompting airlines to explore emerging markets and alternative routing strategies.

Between 2013 and 2019, Northeast Asia gained over 730 international airport pairs, but the region lost over 350 international airport pairs between 2019 and 2025, reversing much of the strong growth experienced in the previous period.

Between 2019 and 2025, the decline in international connectivity was particularly pronounced between Northeast and Southeast Asia, with a loss of 214 airport pairs.

An analysis of the region's top unserved routes reveals distinct market-specific trends, with significant opportunities to reinstate suspended services in mature markets like Mainland China, Taiwan, Japan, and Republic of Korea. In contrast, Hong Kong's international connectivity remains relatively robust and well-established.

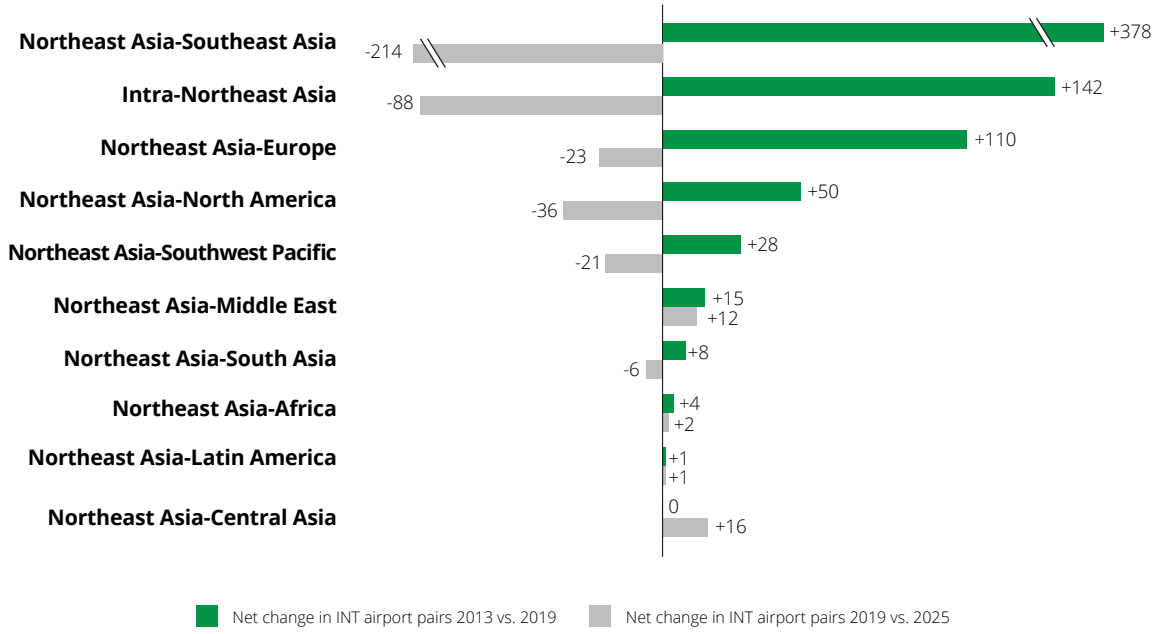
Prior to the COVID-19 pandemic, strong international linkages with Southeast Asia, North America, and Europe positioned Northeast Asia as both a major origin and transit hub in global aviation. Between 2013 and 2019, the region experienced substantial expansion in international connectivity—adding hundreds of airport pairs across nearly all major markets, including Southeast Asia (+378), Europe (+110), North America (+50), and within Northeast Asia (+142).

However, the pandemic triggered a profound disruption in air travel connectivity in the sub-region. From 2019 to 2025, Northeast Asia experienced a significant contraction in its international network. The largest loss occurred in connectivity with Southeast Asia, which fell by 214 airport pairs, reversing much of the earlier decade's gains. Short-haul regional networks also declined sharply, with a net loss of 88 airport pairs within Northeast Asia, reflecting weaker regional demand and prolonged border restrictions.

Losses extended to other long-established markets: routes to North America dropped by 36 airport pairs, the Southwest Pacific by 21, and Europe by 23. More modest declines were also observed in connections to South Asia (-6), though new gains emerged in markets like Central Asia (+16), the Middle East (+12), and Africa (+2), suggesting a limited but notable diversification of the region's international linkages (see Figure 23).

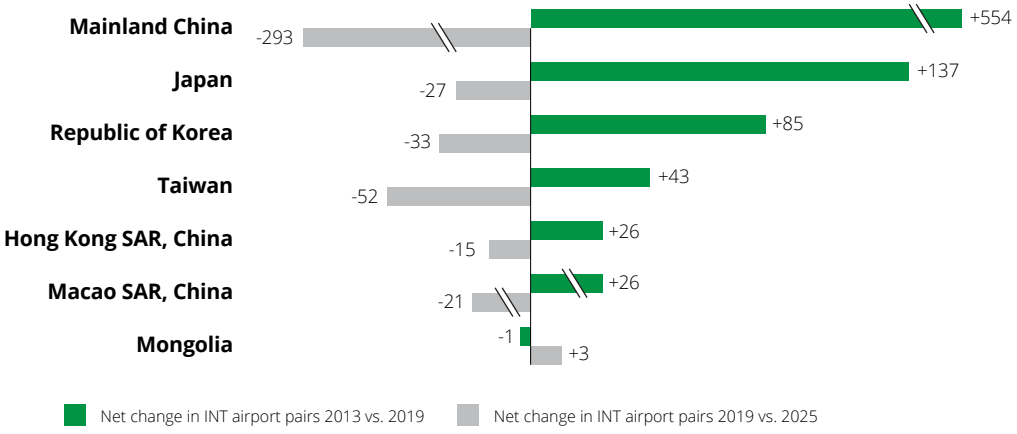
At the individual market level, the reversal is especially stark. Between 2013 and 2019, Mainland China led regional expansion with a net gain of 554 international airport pairs. But from 2019 to 2025, Mainland China experienced a dramatic net loss in international airport pairs (-293)—reflecting prolonged outbound travel restrictions and a recalibration of international operations. Other major markets followed similar trajectories: Taiwan (-52), Republic of Korea (-33), Japan (-27), and Hong Kong SAR (-15) all saw reductions in connectivity. In contrast, Mongolia showed modest gains (+3) (see Figure 24).

Figure 23: Northeast Asia's net change in international airport pairs by region, 2013-2019 and 2019-2025



Source: OAG

Figure 24: Northeast Asian markets' net change in international airport pairs, 2013-2019 and 2019-2025



Source: OAG

Figure 25: International routes gained (+835, in green) and lost (-99, in red) to, from, and within Northeast Asia over the 2013–2019 period (for a net gain of 736)

Source: OAG

Source: OAG

Figure 26: International routes gained (+361, in green) and lost (-718, in red) to, from, and within Northeast Asia over the 2019–2025 period (for a net loss of 357)

Source: OAG

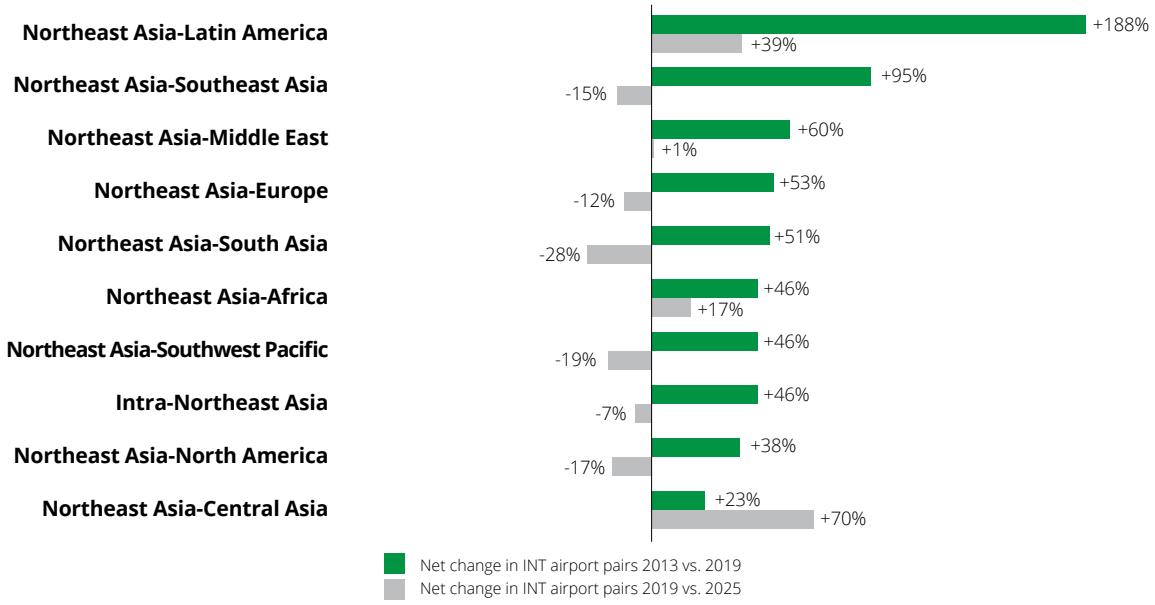
Source: OAG

Insights Based on Scheduled Seat Data

Scheduled seat data highlights a shifting landscape in Northeast Asia's international air travel network. Between 2019 and 2025, the region increased seat capacity to Latin America (+39%), Africa (+17%), and the Middle East (+1%), signaling a continued strategic pivot toward long-haul and emerging markets that have shown more resilience post-pandemic.

In contrast, traditional high-volume markets experienced significant contractions. Seat capacity within Northeast Asia declined by 7%, and transpacific capacity to North America dropped by 17%, despite strong growth in these segments from 2013 to 2019. Capacity to Europe and the Southwest Pacific also declined by 12% and 19%, respectively (see Figure 27).

Figure 27: North Asia's net change in international seat capacity by region, 2013-2019 and 2019-2025



Source: OAG

Top Unserved International Routes (Select Markets)

An analysis of unserved international routes was conducted by comparing average one-way OD demand—which measures passenger volumes (measured in Passengers Daily Each Way (PDEW)) between two airports regardless of transit points—with direct schedule data from OAG. This method identified the top unserved routes for each Northeast Asian market, revealing markets with strong demand but no existing nonstop service. Key findings include:

- Japan's top unserved routes, such as those to/from Phuket and the Maldives, highlight continued interest in tourism-heavy markets, while Republic of Korea's demand is concentrated in South and Southeast Asia, especially India, reflecting heightened interest in visiting the region. (A 44% surge in Indian visitors to Republic of Korea was recorded in 2024). Many top routes were previously operated, suggesting that restoring suspended services may offer quicker wins than launching entirely new routes. Island and resort destinations also present clear opportunities for seasonal or LCC operations.
- The majority of Mainland China's unserved routes (eight out of 10) were previously operated, indicating a reduction in formerly active connections rather than new market gaps.
- In comparing Hong Kong SAR and Macao SAR, Macao SAR shows unmet demand primarily for routes to Mainland China, while Hong Kong SAR is already well served internationally.
- In Mongolia, most underserved international segments represent entirely new markets, with no prior service history—a trend that is similarly reflected, to a slightly lesser extent, in the Russian Federation.

Mainland China

Rank	Airport Code	Airport Name, City	Market	PDEW
1	DEL*	Indira Gandhi International Airport, Delhi	India	240
2	ORD*	Chicago O'Hare International Airport, Chicago	U.S.	181
3	GRU	Sao Paulo Guarulhos International Airport, Sao Paulo	Brazil	178
4	DUS*	Duesseldorf International Airport, Duesseldorf	Germany	110
5	LOS*	Murtala Muhammed International Airport, Lagos	Nigeria	108
6	HNL*	Daniel K. Inouye International Airport, Honolulu	U.S.	101
7	HAM	Hamburg Airport, Hamburg	Germany	94
8	EZE*	Buenos Aires Ministro Pistarini, Buenos Aires	Argentina	93
9	AMM*	Amman Queen Alia International Airport, Amman	Jordan	91
10	IAH*	George Bush Intercontinental Airport, Houston	U.S.	87

Note: The asterisk (*) denotes a destination that was previously served, but is now unserved as of 2025.

Source: OAG

Taiwan

Rank	Airport Code	Airport Name, City	Market	PDEW
1	KMG*	Kunming Changshui International Airport, Kunming	Mainland China	131
2	URC*	Ürümqi Diwopu International Airport, Ürümqi	Mainland China	128
3	SUB*	Juanda International Airport, Surabaya	Indonesia	96
4	CSX*	Changsha Huanghua International Airport, Changsha	Mainland China	91
5	XIY*	Xi'an Xianyang Airport, Xi'an	Mainland China	82
6	ZRH	Zurich Airport, Zurich	Switzerland	72
7	HRB*	Harbin Taiping International Airport, Harbin	Mainland China	66
8	HAK*	Haikou Meilan International Airport, Haikou	Mainland China	62
9	DEL*	Indira Gandhi International Airport, Delhi	India	60
10	CTU*	Chengdu Shuangliu International Airport, Chengdu	Mainland China	59

Note: The asterisk (*) denotes a destination that was previously served, but is now unserved as of 2025.

Source: OAG

Hong Kong SAR, China

Rank	Airport Code	Airport Name, City	Market	PDEW
1	SEA*	Seattle-Tacoma International Airport, Seattle	U.S.	74
2	CTU*	Chengdu Shuangliu International Airport, Chengdu	Mainland China	52
3	LIS	Lisbon Airport, Lisbon	Portugal	51
4	GMP	Seoul Gimpo International Airport, Seoul (Gimpo)	Republic of Korea	50
5	HNL	Daniel K. Inouye International Airport, Honolulu	U.S.	49
6	MEX	Mexico City Juarez International Airport, Mexico City	Mexico	49
7	LGW*	London Gatwick Airport, London	United Kingdom	48
8	BCD	Bacolod–Silay International Airport, Bacolod-Silay	Philippines	47
9	YYC	Calgary International Airport, Calgary	Canada	47
10	ISB	Islamabad International Airport, Islamabad	Pakistan	44

Note: The asterisk (*) denotes a destination that was previously served, but is now unserved as of 2025.

Source: OAG

Japan

Rank	Airport Code	Airport Name, City	Market	PDEW
1	HKT	Phuket International Airport, Phuket	Thailand	211
2	PNH*	Phnom Penh International Airport, Phnom Penh	Cambodia	181
3	GRU	Sao Paulo Guarulhos International Airport, Sao Paulo	Brazil	162
4	MCO	Orlando International Airport, Orlando	U.S.	149
5	MLE*	Velana International Airport, Velana	Maldives	144
6	SVO*	Moscow Sheremetyevo International Airport, Moscow	Russia	125
7	LGW	London Gatwick Airport, London	United Kingdom	124
8	CTU*	Chengdu Shuangliu International Airport, Chengdu	Mainland China	119
9	PEN	Penang International Airport, Georgetown	Malaysia	106
10	SUB	Juanda International Airport, Surabaya	Indonesia	103

Note: The asterisk (*) denotes a destination that was previously served, but is now unserved as of 2025.

Source: OAG

Republic of Korea

Rank	Airport Code	Airport Name, City	Market	PDEW
1	SVO*	Moscow Sheremetyevo International Airport, Moscow	Russia	126
2	BOM*	Mumbai Chhatrapati Shivaji Maharaj International Airport, Mumbai	India	78
3	PPS*	Puerto Princesa International Airport, Puerto Princesa	Philippines	74
4	MAA*	Chennai International Airport, Chennai	India	72
5	BLR*	Kempegowda International Airport, Bengaluru	India	64
6	CTU*	Chengdu Shuangliu International Airport, Chengdu	Mainland China	61
7	MLE	Velana International Airport, Velana	Maldives	59
8	BER	Berlin Brandenburg Airport, Berlin	Germany	58
9	SUB	Juanda International Airport, Surabaya	Indonesia	52
10	PEN	Penang International Airport, Georgetown	Malaysia	48

Note: The asterisk (*) denotes a destination that was previously served, but is now unserved as of 2025.

Source: OAG

Macao (SAR) China

Rank	Airport Code	Airport Name, City	Market	PDEW
1	CEB*	Mactan–Cebu International Airport, Cebu (Mactan)	Philippines	45
2	KCH	Kuching International Airport, Kuching	Malaysia	24
3	SHE*	Shenyang Taoxian International Airport, Shenyang	Mainland China	22
4	CTU*	Chengdu Shuangliu International Airport, Chengdu	Mainland China	22
5	CNX*	Chiang Mai International Airport, Chiang Mai	Thailand	22
6	CGQ	Changchun Longjia International Airport, Changchun	Mainland China	21
7	HRB*	Harbin Taiping International Airport, Harbin	Mainland China	21
8	HKT*	Phuket International Airport, Phuket	Thailand	19
9	DLC	Dalian Zhoushuizi International Airport, Dalian	Mainland China	16
10	BKI*	Kota Kinabalu International Airport, Kota Kinabalu	Malaysia	15

Note: The asterisk (*) denotes a destination that was previously served, but is now unserved as of 2025.

Source: OAG

Mongolia

Rank	Airport Code	Airport Name, City	Market	PDEW
1	SYD	Sydney Kingsford Smith Airport, Sydney	Australia	19
2	SHA	Shanghai Hongqiao International Airport, Shanghai	Mainland China	13
3	PQC	Phu Quoc International Airport, Phú Quốc	Vietnam	11
4	SFO	San Francisco International Airport, San Francisco	U.S.	9
5	LAX	Los Angeles International Airport, Los Angeles	U.S.	9
6	MNL	Manila Ninoy Aquino International Airport, Manila	Philippines	8
7	IAD	Washington Dulles International Airport, Washington, D.C.	U.S.	8
8	TPE	Taipei Taiwan Taoyuan International Airport, Taipei	Taiwan	8
9	CDG*	Charles de Gaulle Airport, Paris	France	8
10	KUL	Kuala Lumpur International Airport, Kuala Lumpur	Malaysia	7

Note: The asterisk (*) denotes a destination that was previously served, but is now unserved as of 2025.

Source: OAG

Using OAG's booking data, we analyzed passenger itineraries to identify key connecting hubs for routes that were previously served but are now unserved. The tables below highlight the top three connecting airports by destination region, along with the share of OD demand each hub captures. OD demand refers to the total number of passengers traveling between two cities or airports, regardless of the route or connections they take.

Destination's region from Northeast Asia	Percentage of total region flow demand (%)		
	1st connecting airport	2nd connecting airport	3rd connecting airport
Southeast Asia	HKG (21%)	MNL (14%)	SIN (14%)
South Asia	HKG (29%)	SIN (26%)	BKK (15%)
Europe	PVG (24%)	PEK and PKX (23%)	DXB (9%)
Middle East	DOH (45%)	DXB (11%)	CAI (9%)
Africa	DOH (39%)	ADD (27%)	DXB (20%)
North America	ICN (17%)	HND (10%)	SFO (10%)
Southwest Pacific	ICN (53%)	PEK (30%)	HKG (14%)

Source: OAG

Hong Kong (HKG) emerges as a dominant transit hub for both Southeast Asia and South Asia, while Singapore (SIN) and Bangkok (BKK) continue to play important regional roles. In long-haul markets, Doha (DOH) leads in connectivity to the Middle East and Africa, reflecting Qatar Airways' extensive network reach. For Europe, Chinese hubs such as Shanghai (PVG) and the Beijing airports (PEK and PKX) account for nearly half the connecting traffic. Notably, Incheon (ICN) is a major player for onward travel to North America and Southwest Pacific, highlighting the strength of Korean Air and regional partnerships.

Appendix — Sub-regional focus

Central Asia

Summary

Central Asia is rapidly emerging as a strategic node in Asia Pacific aviation. Its location at the crossroads of Europe and Asia, combined with challenging terrain, justifies its investments in commercial air transport. In 2024, all five Central Asian markets recorded real GDP growth above 4%, fueling a strong rebound in passenger demand—reaching or surpassing pre-COVID levels by early 2022. This momentum was further supported by the launch of Eurasian Civil Aviation Conference (EACAC) in late 2024, signaling a push for cross-border coordination and regulatory alignment.

The region saw modest growth from 2013 to 2019. There was limited expansion in international airport pairs, with small gains in connections to/from Europe (+8) and the Middle East (+3), alongside a 55% increase in intra-regional seat capacity.

From 2019 to 2025, the region added many more airport pairs—Europe (+39), Middle East (+22), Northeast Asia (+16), and Southeast Asia (+10)—and experienced significant seat capacity growth to Africa (+795%), Middle East (+211%), and North America (+69%).

The region is increasingly acting as a strategic connector between East and West, though some high-demand routes to Russian and Chinese cities remain underserved.

However, many of the underserved routes currently lack the passenger volumes required to support viable direct services in the near term, as reflected in the low passenger demand.

Central Asia's aviation sector is experiencing rapid growth, outpacing other regions in Asia. This surge is fueled by a combination of factors, including pent-up travel demand, liberalization reforms, and the re-routing of traffic through the region due to geopolitical shifts. Airlines are expanding their fleets and networks, while airports are seeing significant increases in passenger and cargo traffic.

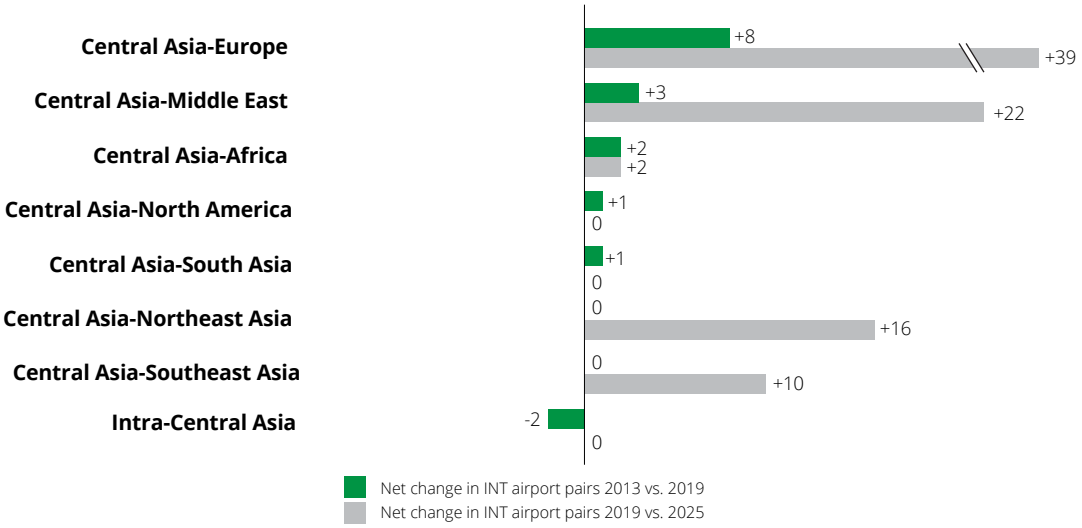
While much of the world saw sharp declines in unique airport pairs, Central Asia expanded its reach across several regions. Between 2019 and 2025, the region gained 39 new international airport pairs with Europe, building on a more modest gain of 8 pairs between 2013 and 2019.

Connectivity to the Middle East rose by 22 new pairs, following an earlier gain of just three pairs in the previous six-year period. The region also expanded links with Northeast Asia (+16) and Southeast Asia (+10)—a sharp acceleration compared to no growth with Northeast Asia and Southeast Asia from 2013 to 2019 (see Figure 28). This expansion reflects the region's growing role as a connector between East and West.

At the individual market level, Uzbekistan experienced the largest growth in International airport pairs (+46) among Central Asian markets, aligning with its broader aspirational strategy to develop itself as a regional transit hub[12]. Kazakhstan built on its previous momentum, adding 19 new pairs on top of 13 gained during the earlier period (see Figure 29).

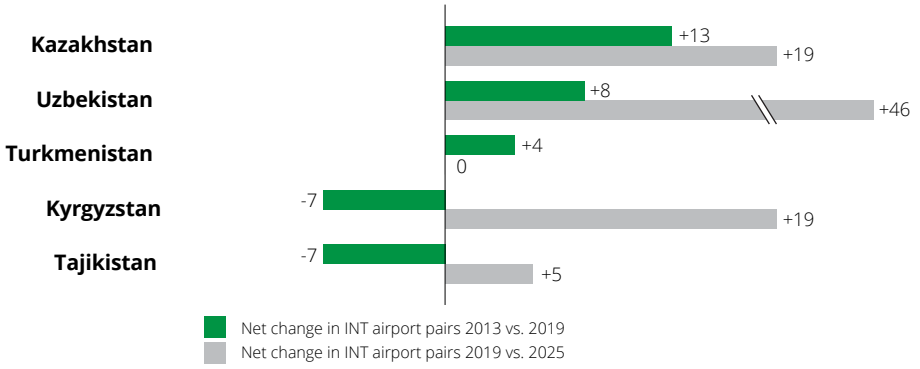
[12] Source: Uzbekistan: An Aspiring Transport Hub for Central Asia - Jamestown

Figure 28: Central Asia's net change in international airport pairs by region, 2013-2019 and 2019-2025



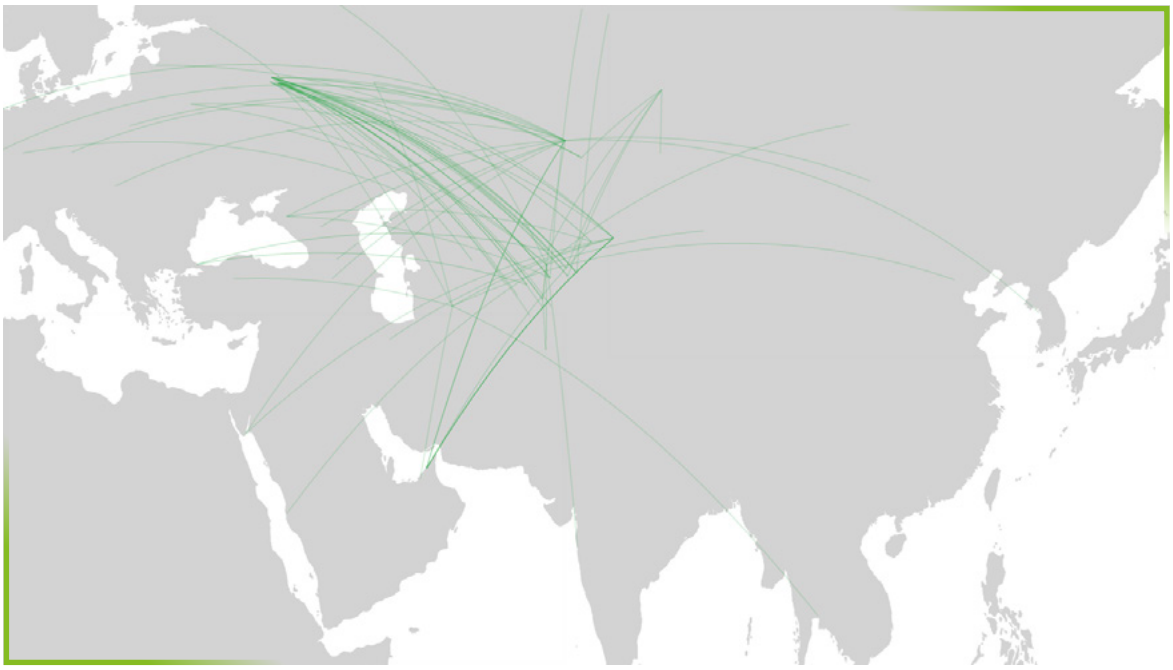
Source: OAG

Figure 29: Central Asian markets' net change in international airport pairs, 2013-2019 and 2019-2025

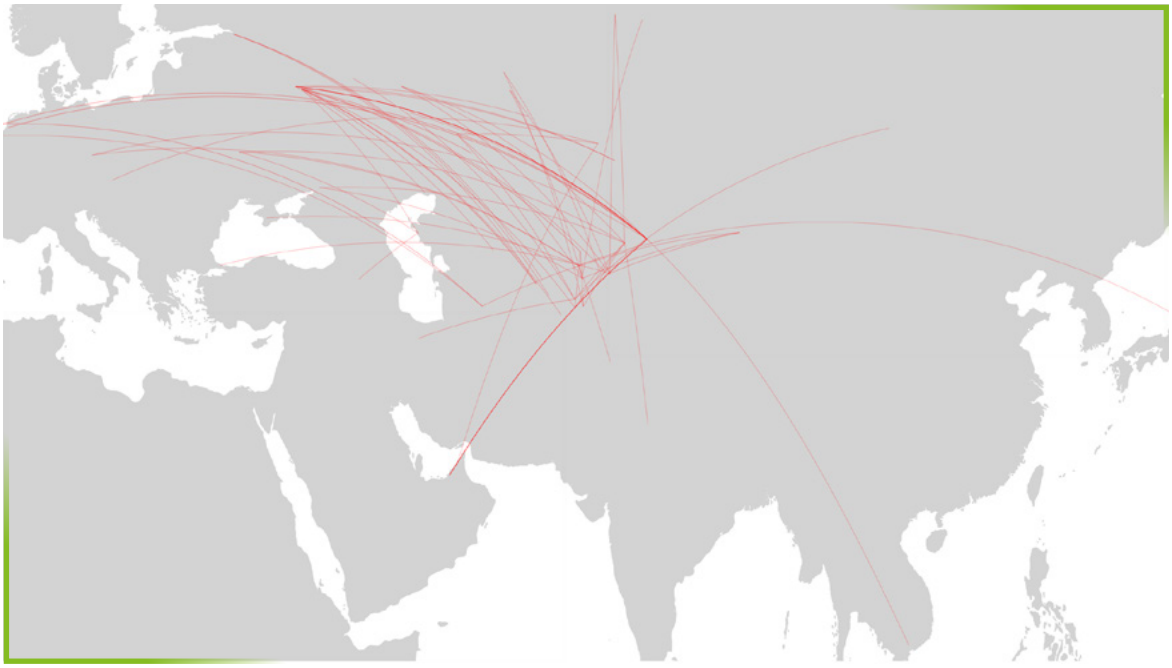


Source: OAG

Figure 30: International routes gained (+75, in green) and lost (-62, in red) to, from, and within Central Asia over the 2013–2019 period (for a net gain of 13)



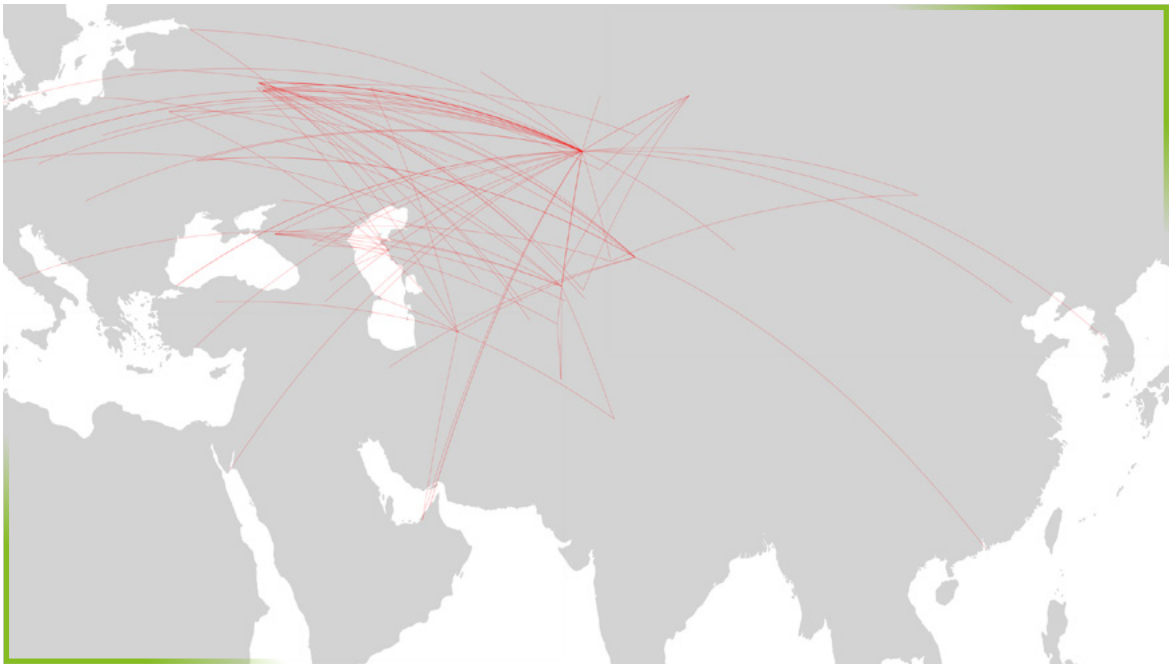
Source: OAG



Source: OAG

Figure 31: International routes gained (+169, in green) and lost (-80, in red) to, from, and within Central Asia over the 2019–2025 period (for a net gain of 89)

Source: OAG



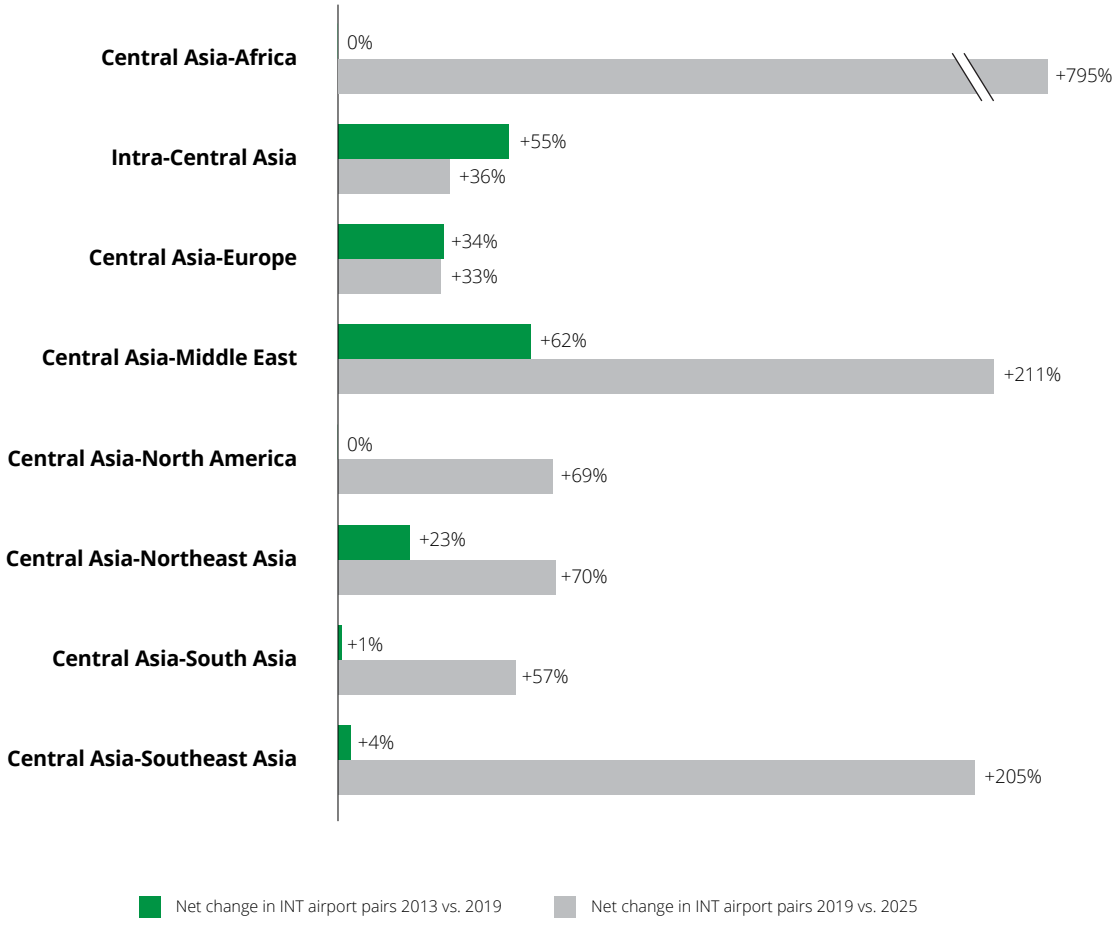
Source: OAG

Insights Based on Scheduled Seat Data

Despite its landlocked geography, Central Asia saw notable increases in seat capacity to other regions from 2019 to 2025. Scheduled seat volumes surged to Africa (+795%) and the Middle East (+211%). Growth to North America (+69%) and Europe (+33%) was also observed. Additionally, intra-Central Asia seat capacity increased by 36% (see figure 32).

These broader regional gains highlight a possible strategic positioning of the region within the global aviation network. As carriers continue to pursue diversification, Central Asia is emerging as an increasingly important player in linking Eurasian air corridors.

*Figure 32: **C**entral Asia's net change in international seat capacity by region, 2013-2019 and 2019-2025*



Source: OAG

Top Unserved International Routes (Select Markets)

An analysis of unserved international routes was conducted by comparing average one-way OD demand—which measures passenger volumes (measured in PDEW) between two airports regardless of transit points—with direct schedule data from OAG. This method identified the top unserved routes for each Central Asian market, revealing markets which have strong demand but no existing nonstop service. Key findings include:

- Airports like Kaliningrad (KGD) appear as the top unserved route in Uzbekistan, Kyrgyzstan, Tajikistan, and Kazakhstan, while other Russian cities (e.g., St. Petersburg, Yuzhno-Sakhalinsk, Voronezh) also have unmet demand.
- Cities like Guangzhou and Xi'an appear repeatedly across markets, suggesting Mainland China–Central Asia connectivity remains underdeveloped.
- However, many of the underserved routes currently lack the passenger volumes required to support viable direct services in the near term, as reflected in the low PDEW.

Kazakhstan

Rank	Airport Code	Airport Name, City	Market	PDEW
1	CDG*	Charles de Gaulle Airport, Paris	France	33
2	BCN	Barcelona Airport, Barcelona	Spain	30
3	JFK*	John F. Kennedy International Airport, New York	U.S.	30
4	ECN	Ercan International Airport, Ercan	Cyprus	29
5	KGD*	Kaliningrad Khrabrovo Airport, Kaliningrad	Russia	28
6	VIE*	Vienna International Airport, Vienna	Austria	25
7	BER	Berlin Brandenburg Airport, Berlin	Germany	25
8	DUS	Duesseldorf International Airport, Duesseldorf	Germany	21
9	TLV*	Tel Aviv-yafo Ben Gurion International, Tel Aviv	Israel	19
10	HAM	Hamburg Airport, Hamburg	Germany	17

Note: The asterisk (*) denotes a destination that was previously served, but is now unserved as of 2025.

Source: OAG

Kyrgyzstan

Rank	Airport Code	Airport Name, City	Market	PDEW
1	KGD*	Kaliningrad Khrabrovo Airport, Kaliningrad	Russia	24
2	UUS	Yuzhno-Sakhalinsk International Airport, Yuzhno-Sakhalinsk	Russia	23
3	FRA	Frankfurt Airport, Frankfurt	Germany	20
4	CAN	Baiyun International Airport, Guangzhou	Mainland China	17
5	BER	Berlin Brandenburg Airport, Berlin	Germany	13
6	DUS	Duesseldorf International Airport, Duesseldorf	Germany	12
7	ORD	Chicago O'Hare International Airport, Chicago	U.S	12
8	MCT*	Muscat International Airport, Muscat	Oman	11
9	VIE*	Vienna International Airport, Vienna	Austria	11
10	MUC	Munich International Airport, Munich	Germany	10

Note: The asterisk (*) denotes a destination that was previously served, but is now unserved as of 2025.

Source: OAG

Tajikistan

Rank	Airport Code	Airport Name, City	Market	PDEW
1	KGD*	Kaliningrad Khrabrovo Airport, Kaliningrad	Russia	18
2	CAN	Baiyun International Airport, Guangzhou	Mainland China	8
3	PEK*	Beijing Capital International Airport, Beijing	Mainland China	5
4	LHR	London Heathrow Airport, London	United Kingdom	4
5	MSQ	Minsk National Airport, Minsk	Belarus	3
6	XIY*	Xi'an Xianyang Airport, Xi'an	Mainland China	3
7	ICN	Seoul Incheon International Airport, Incheon	Republic of Korea	3
8	CDG	Charles de Gaulle Airport, Paris	France	3
9	VOZ*	Voronezh International Airport, Voronezh	Russia	3
10	AYT	Antalya Airport, Antalya	Turkey	3

**Note: Destination previously served but unserved in 2025.*

Source: OAG

Turkmenistan

Rank	Airport Code	Airport Name, City	Market	PDEW
1	LED*	St Petersburg Pulkovo Airport, St Petersburg	Russia	28
2	VKO	Moscow Vnukovo International Airport, Vnukovo	Russia	19
3	ECN	Ercan International Airport, Ercan	Cyprus	11
4	ESB*	Ankara Esenboga Airport, Ankara Esenboğa	Turkey	6
5	CAN	Baiyun International Airport, Guangzhou	Mainland China	4
6	AYT	Antalya Airport, Antalya	Turkey	4
7	ERZ*	Erzurum Airport, Erzurum	Turkey	3
8	KGD	Kaliningrad Khrabrovo Airport, Kaliningrad	Russia	3
9	ALA*	Almaty International Airport, Almaty	Kazakhstan	3
10	XIY	Xi'an Xianyang Airport, Xi'an	Mainland China	3

**Note: Destination previously served but unserved in 2025.*

Source: OAG

Uzbekistan

Rank	Airport Code	Airport Name, City	Market	PDEW
1	KGD*	Kaliningrad Khrabrovo Airport, Kaliningrad	Russia	69
2	AYT*	Antalya Airport, Antalya	Turkey	32
3	BER	Berlin Brandenburg Airport, Berlin	Germany	17
4	VIE	Vienna International Airport, Vienna	Austria	17
5	BCN*	Barcelona Airport, Barcelona	Spain	16
6	RUH*	King Khalid International Airport, Riyadh	Saudi Arabia	14
7	SHA	Shanghai Hongqiao International Airport, Shanghai	Mainland China	12
8	IAD	Washington Dulles International Airport, Washington, D.C.	U.S.	12
9	AMS	Schiphol Airport, Amsterdam	Netherlands	12
10	AHB	Abha Airport, Abha	Saudi Arabia	11

**Note: Destination previously served but unserved in 2025.*

Source: OAG

Using OAG's booking data, we analyzed passenger itineraries to identify key connecting hubs for routes that were previously served but are now unserved. The tables below highlight the top three connecting airports by destination region, along with the share of OD demand each hub captures. OD demand refers to the total number of passengers traveling between two cities or airports, regardless of the route or connections they take.

Destination's region from Central Asia	Percentage of total region flow demand (%)		
	1st connecting airport	2nd connecting airport	3rd connecting airport
Northeast Asia	URC (36%)	PKX (29%)	OVB (21%)
Europe	IST (46%)	SVO (16%)	SAW (9%)
Middle East	DXB (52%)	GYD (14%)	JED (9%)
North America	IST (68%)	WAW (8%)	TAS (7%)

Source: OAG

Istanbul (IST) stands out as a major gateway, capturing the majority of connecting demand to Europe (46%) and an overwhelming 68% for North America, underscoring Turkish Airlines' strategic positioning. In the Middle East, Dubai (DXB) is the primary hub, handling over half of the region's connecting traffic. For Northeast Asia, Chinese and Central Asian airports like Ürümqi (URC), Beijing Daxing (PKX), and Novosibirsk (OVB) dominate, indicating a strong reliance on trans-Eurasian connections through northern corridors.

Appendix — Sub-regional focus

South Asia

Summary

Growth in South Asia's aviation sector is expected to be driven primarily by India, supported by a rising middle class, strong government initiatives, and intense airline competition.

From 2013 to 2019, South Asia[13] expanded international airport pairs notably with the Middle East (+52), Southeast Asia (+29), and Europe (+12), driven largely by India's addition of 82 new international airport pairs, reflecting rising economic influence and deeper integration into global aviation.

South Asia's international airport pairs showed relative stability and growth through the pandemic period, led predominantly by India's rapid expansion (+40 international pairs from 2019 to 2025), signaling a robust recovery supported by strong economic growth and rising travel demand. This is a continuation of India's strong growth trend observed from 2013 to 2019.

From 2019 to 2025, seat capacity with the Southwest Pacific (+120%), North America (+63%), and Africa (+61%) surged, alongside continued growth in Europe (+35%), signaling broadening global connectivity.

India's expanding global footprint is generating substantial demand for direct, nonstop long-haul connectivity—particularly to key North American cities such as Dallas, New York, and Toronto, as well as European hubs like Milan and Dublin. These high demand, yet unserved or suspended routes present significant opportunities for both service restoration and network expansion by South Asian carriers.

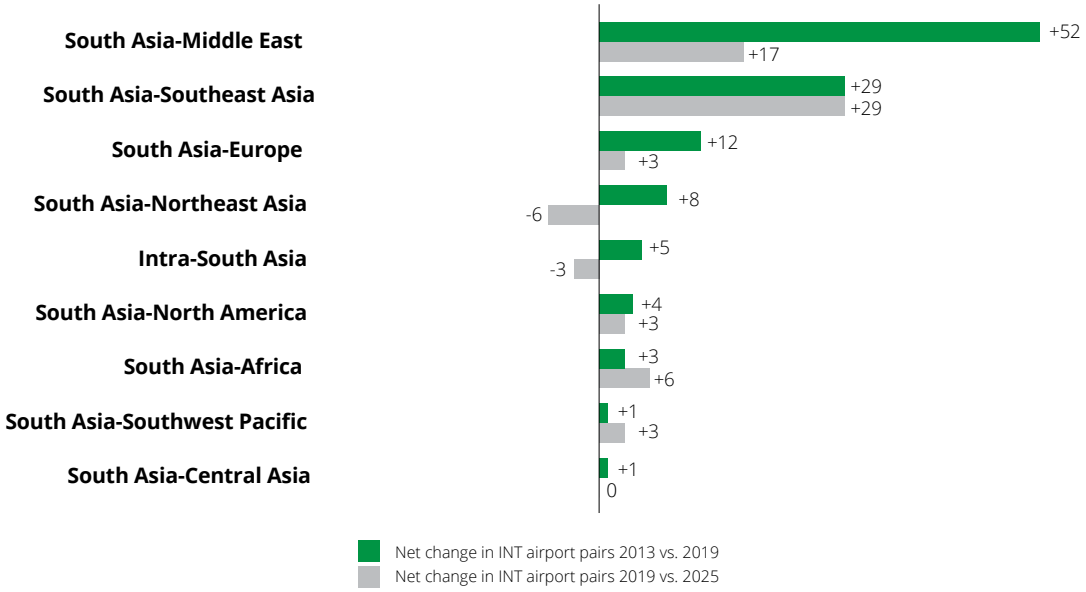
Compared to other Asia Pacific regions, South Asia's international air connectivity showed relative resilience through the COVID-19 pandemic. From 2013 to 2019, the region experienced strong growth in international airport pairs, particularly with key markets such as the Middle East (+52), Southeast Asia (+29), and Europe (+12). This expansion reflected South Asia's rising economic influence and increasing integration into global aviation networks.

While some Asia Pacific regions saw steep declines during the pandemic, South Asia's network experienced only modest impacts between 2019 and 2025. International airport pairs increased in several key markets during this later period, including the Middle East (+17), Southeast Asia (+29), Europe (+3), and Africa (+6), underscoring sustained outward demand despite global disruptions (see Figure 33).

At the individual market level, India was the dominant driver of growth, adding 82 international airport pairs between 2013 and 2019 and another 40 from 2019 to 2025, far exceeding gains made by other South Asian nations. Bangladesh also recorded moderate increases in international connectivity, while markets such as Sri Lanka, Nepal, Afghanistan, and Bhutan saw little to no net change in international airport pairs during the same periods (see Figure 34).

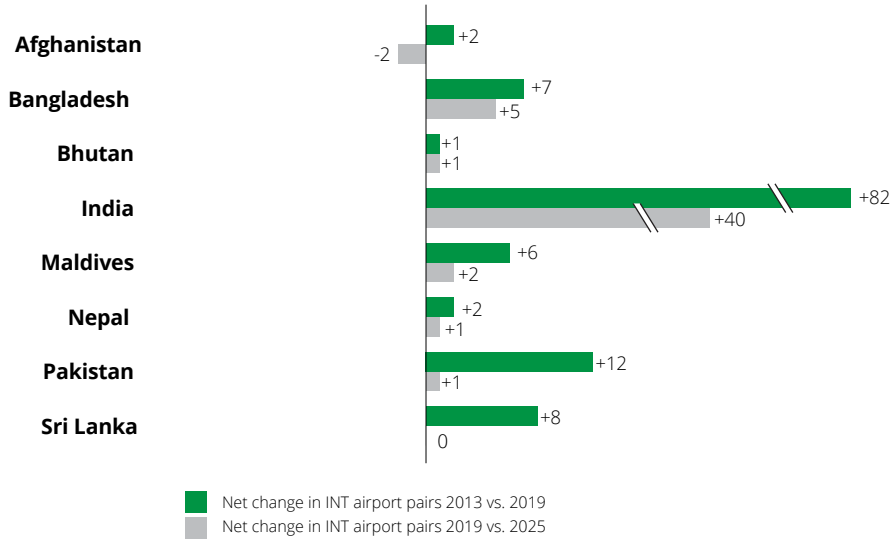
[13] Our unserved routes analysis only focuses on the following subset of South Asian markets: Bangladesh, India, and Sri Lanka.

Figure 33: South Asia's net change in international airport pairs by region, 2013-2019 and 2019-2025



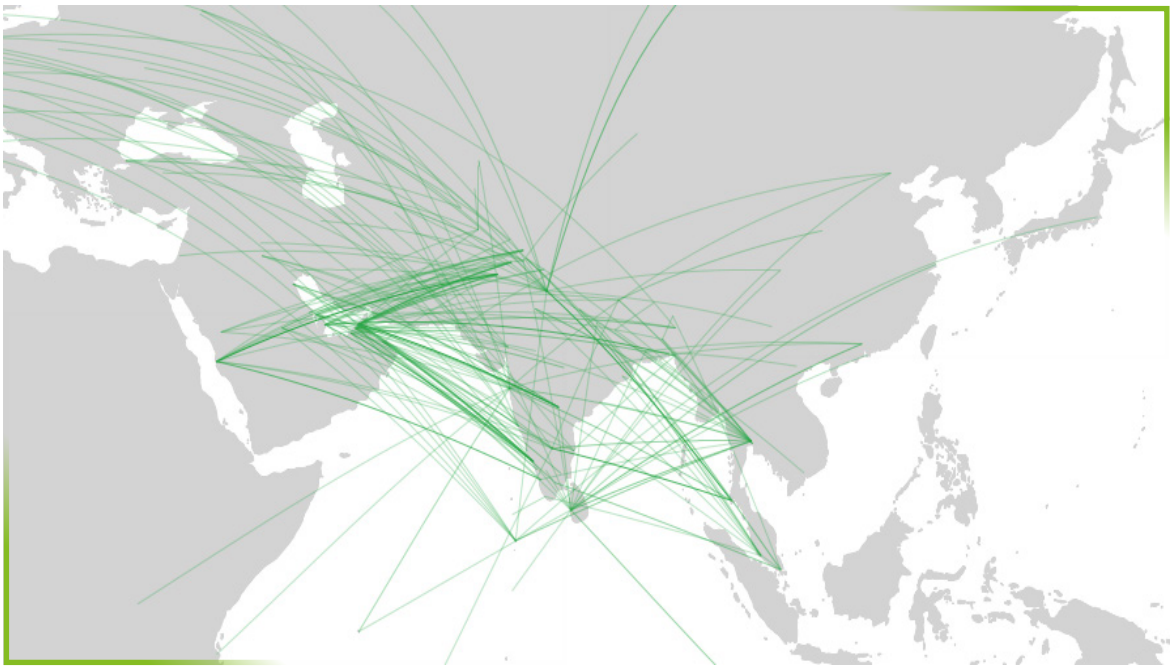
Source: OAG

Figure 34: South Asian markets' net change in international airport pairs, 2013-2019 and 2019-2025

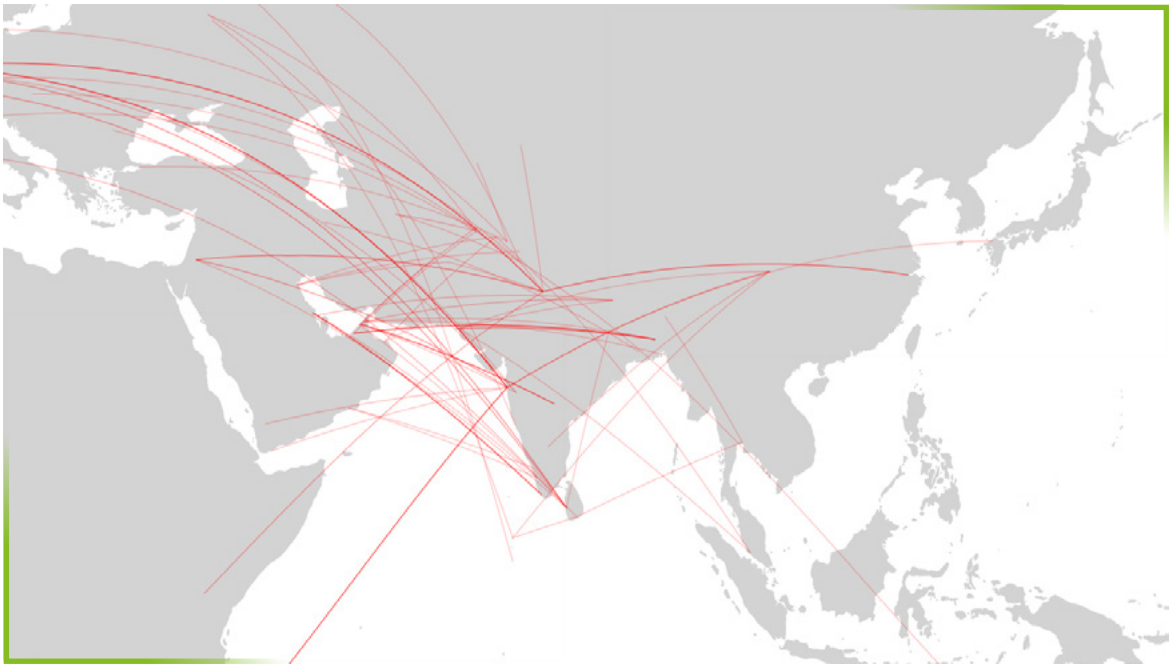


Source: OAG

Figure 35: International routes gained (+183, in green) and lost (-68, in red) to, from, and within South Asia over the 2013–2019 period (for a net gain of 115)



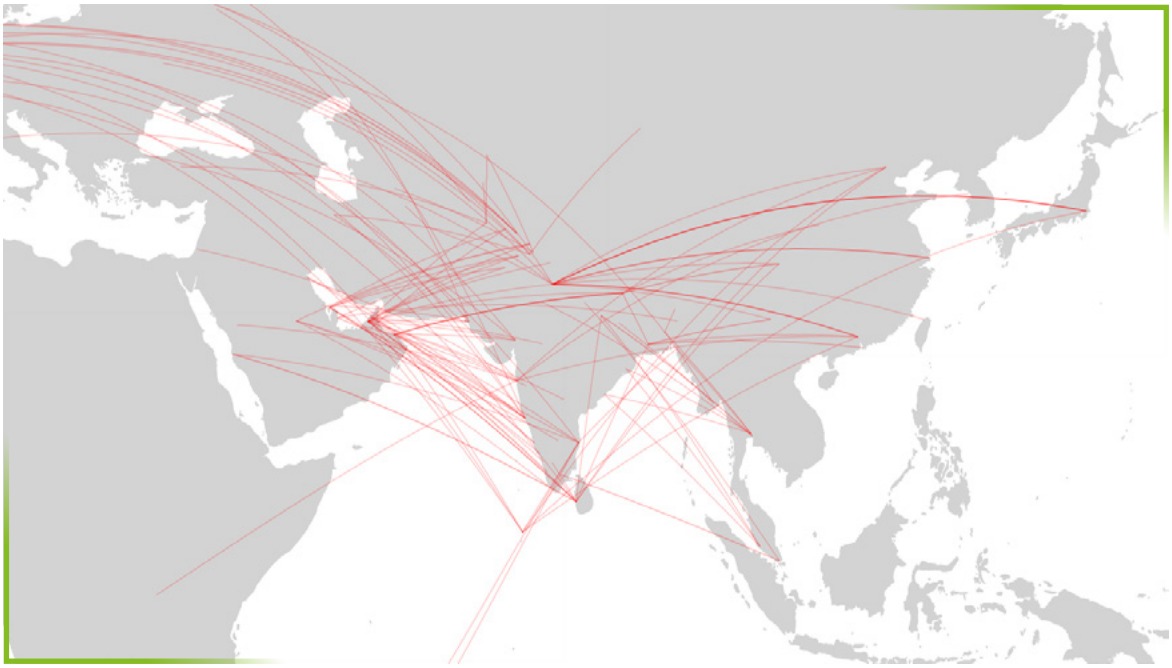
Source: OAG



Source: OAG

Figure 36: International routes gained (+170, in green) and lost (-118, in red) to, from, and within South Asia over the 2019–2025 period (for a net gain of 52)

Source: OAG



Source: OAG

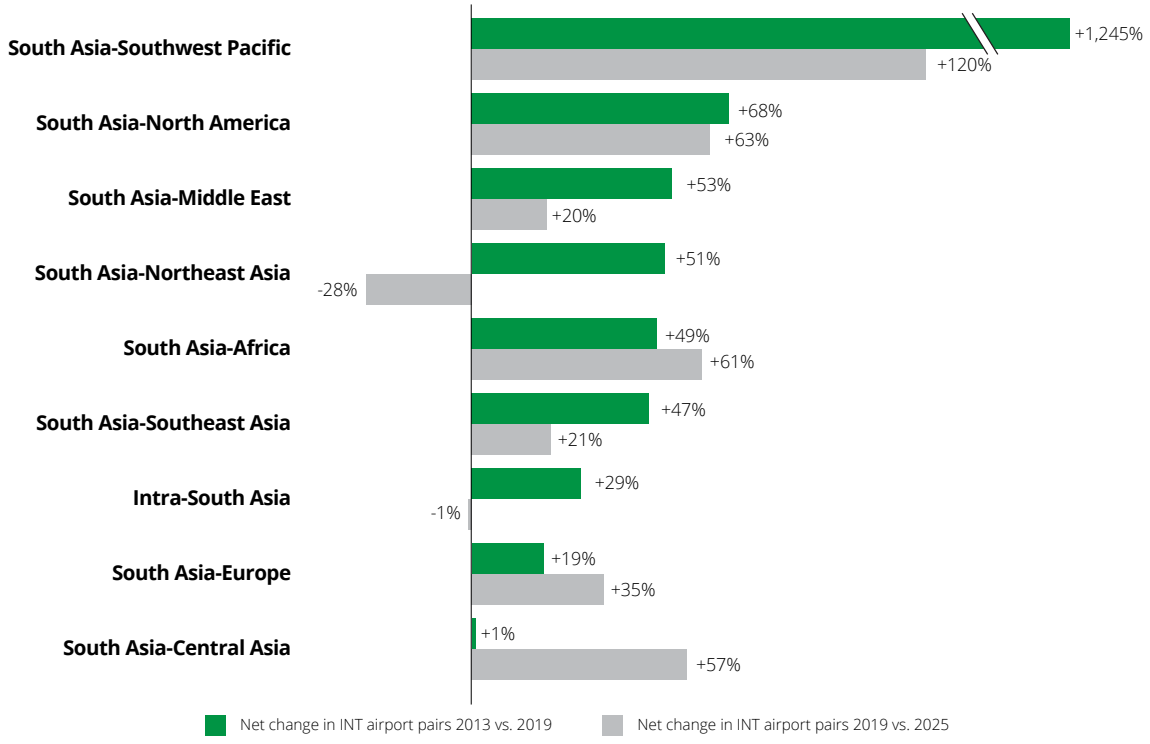
Insights Based on Scheduled Seat Data

Capacity between South Asia and the Southwest Pacific surged by 120% from 2019 to 2025, following an even more dramatic 1,245% increase from 2013 to 2019. Similarly strong growth was seen in seat capacity to North America (+63%) and Africa (+61%) during the same period. The widespread expansion in scheduled international seat capacity from South Asia across all global regions is particularly noteworthy.

While much attention has been focused on strategic growth corridors such as the Middle East, North America, and the Southwest Pacific, the data suggests that South Asia is not just expanding in select markets but broadening its global reach, with growth in Europe (+35%) further underscoring this trend (see Figure 37).

Together, these figures highlight South Asia's emergence as a key player in international aviation, marked by robust growth and resilience despite global disruptions.

Figure 37: South Asia's net change in international seat capacity by region, 2013-2019 and 2019-2025



Source: OAG

Top Unserved International Routes (Select Markets)

An analysis of unserved international routes was conducted by comparing average one-way OD demand—which measures passenger volumes (measured in PDEW) between two airports regardless of transit points—with direct schedule data from OAG. This method identified the top unserved routes for South Asia, revealing markets which have strong demand but no existing nonstop service. Key findings include:

- All three markets show substantial unserved demand to North America, particularly the U.S. and Canada. India's top unserved route is Dallas (436 PDEW), with five additional U.S. cities in its top ten. Bangladesh shows 199 PDEW to JFK, and Sri Lanka has 116 PDEW to Toronto, making North America a consistently underserved yet high-potential region across South Asia.
- India's top unserved routes show significantly higher PDEW figures than Bangladesh or Sri Lanka. Multiple routes exceed 300 PDEW, with a top value of 436 to DFW. This reflects India's larger population and increasing outbound demand. These volumes suggest such routes could potentially support widebody or nonstop operations.

Bangladesh

Rank	Airport Code	Airport Name, City	Market	PDEW
1	JFK	John F. Kennedy International Airport, New York	U.S.	199
2	YYZ*	Toronto Pearson International Airport, Toronto	Canada	98
3	SYD	Sydney Kingsford Smith Airport, Sydney	Australia	95
4	SGN*	Ho Chi Minh Saigon Airport, Ho Chi Minh City	Vietnam	72
5	AHB	Abha Airport, Abha	Saudi Arabia	69
6	CDG	Charles de Gaulle Airport, Paris	France	64
7	PEN	Penang International Airport, Georgetown	Malaysia	59
8	MXP	Milan Malpensa Airport, Milan	Italy	53
9	TUU	Tabuk Regional Airport, Tabuk	Saudi Arabia	51
10	ELQ	Prince Naif bin Abdulaziz International Airport, Buraidah	Saudi Arabia	45

**Note: Destination previously served but unserved in 2025.*

Source: OAG

India

Rank	Airport Code	Airport Name, City	Market	PDEW
1	DFW	Dallas Fort Worth International Airport, Dallas	U.S.	436
2	LAX	Los Angeles International Airport, Los Angeles	U.S.	381
3	AKL*	Auckland International Airport, Auckland	New Zealand	361
4	DUB*	Dublin Airport, Dublin	Ireland	347
5	SEA*	Seattle-Tacoma International Airport, Seattle	U.S.	341
6	BOS	Boston Edward L Logan International Airport, Boston	U.S.	300
7	PVG*	Shanghai Pudong International Airport, Shanghai	Mainland China	296
8	ATL	Atlanta Hartsfield-Jackson International Airport, Atlanta	U.S.	292
9	IAH	George Bush Intercontinental Airport, Houston	U.S.	285
10	BCN	Barcelona Airport, Barcelona	Spain	256

**Note: Destination previously served but unserved in 2025.*

Source: OAG

Sri Lanka

Rank	Airport Code	Airport Name, City	Market	PDEW
1	YYZ	Toronto Pearson International Airport, Toronto	Canada	116
2	MXP*	Milan Malpensa Airport, Milan	Italy	93
3	AMS*	Schiphol Airport, Amsterdam	Netherlands	83
4	MUC	Munich International Airport, Munich	Germany	67
5	FCO*	Rome Fiumicino Airport, Rome	Italy	55
6	DUS*	Duesseldorf International Airport, Duesseldorf	Germany	52
7	VIE*	Vienna International Airport, Vienna	Austria	47
8	AKL	Auckland International Airport, Auckland	New Zealand	45
9	BNE	Brisbane Airport, Brisbane	Australia	34
10	MAD	Madrid Adolfo Suarez-Barajas Airport, Madrid	Spain	33

**Note: Destination previously served but unserved in 2025.*

Source: OAG

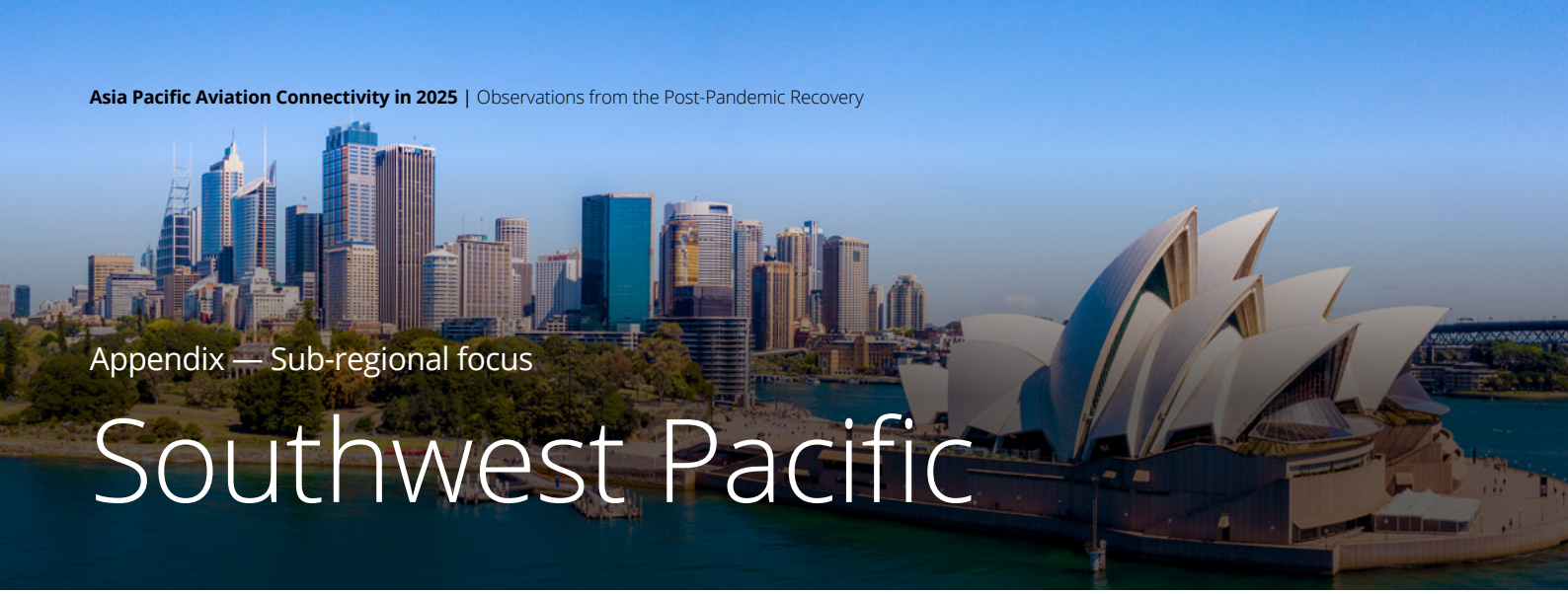
Using OAG's booking data, we analyzed passenger itineraries to identify key connecting hubs for routes that were previously served but are now unserved. The tables below highlight the top three connecting airports by destination region, along with the share of OD demand each hub captures. OD demand refers to the total number of passengers traveling between two cities or airports, regardless of the route or connections they take.

Destination's region from Central Asia	Percentage of total region flow demand (%)		
	1st connecting airport	2nd connecting airport	3rd connecting airport
Southeast Asia	KUL (65%)	SIN (14%)	BKK (10%)
Northeast Asia	HKG (39%)	SIN (19%)	BKK (17%)
Europe	DOH (29%)	AUH (27%)	DXB (21%)
Middle East	JED (43%)	RUH (27%)	SHJ (13%)
North America	DXB (31%)	DOH (22%)	LHR (11%)
Southwest Pacific	SIN (34%)	KUL (29%)	HKG (11%)

**Note: Destination previously served but unserved in 2025.*

Source: OAG

Kuala Lumpur (KUL) plays a key role in routing passengers to Southeast Asia, capturing 65% of connecting demand, while Hong Kong (HKG) leads for Northeast Asia at 39%. In long-haul markets, Middle East hubs such as Doha (DOH), Abu Dhabi (AUH), and Dubai (DXB) are major gateways to Europe and North America, collectively channeling a large portion of traffic. For Southwest Pacific, connectivity is more dispersed but still led by Singapore (SIN) and Kuala Lumpur (KUL). Within the Middle East, local hubs like Jeddah (JED) and Riyadh (RUH) dominate intra-regional transit.



Appendix — Sub-regional focus

Southwest Pacific

Summary

Between 2013 and 2019, the Southwest Pacific region saw robust growth in international seat capacity, driven largely by strong gains from long-haul markets. Seat capacity increased significantly from the Middle East (+65%), North America (+30%), and Latin America (+69%). This period reflected an expanding and well-integrated aviation network with rising demand across key intercontinental corridors.

Post-pandemic, from 2019 to 2025, the region's geographic isolation shielded it from severe connectivity losses. As a result, the net change in international airport pairs was minimal compared to other regions.

Australia and New Zealand show strong unserved demand to major cities in Europe, South Asia, and Asia—including several previously operated routes like Frankfurt, Istanbul, and Delhi—indicating clear opportunities for service restoration and improved regional connectivity.

Prior to the COVID-19 pandemic, the Southwest Pacific[14] region—particularly Australia—maintained strong international air connectivity supported by inbound tourism, outbound leisure travel, and deep links with Asia, North America, and Europe. Despite its geographic isolation necessitating long-haul travel, the region's aviation market was relatively stable and well-integrated into global air networks. Between 2013 and 2019, Australia significantly expanded its international connectivity, adding 46 new airport pairs, while New Zealand added 12.

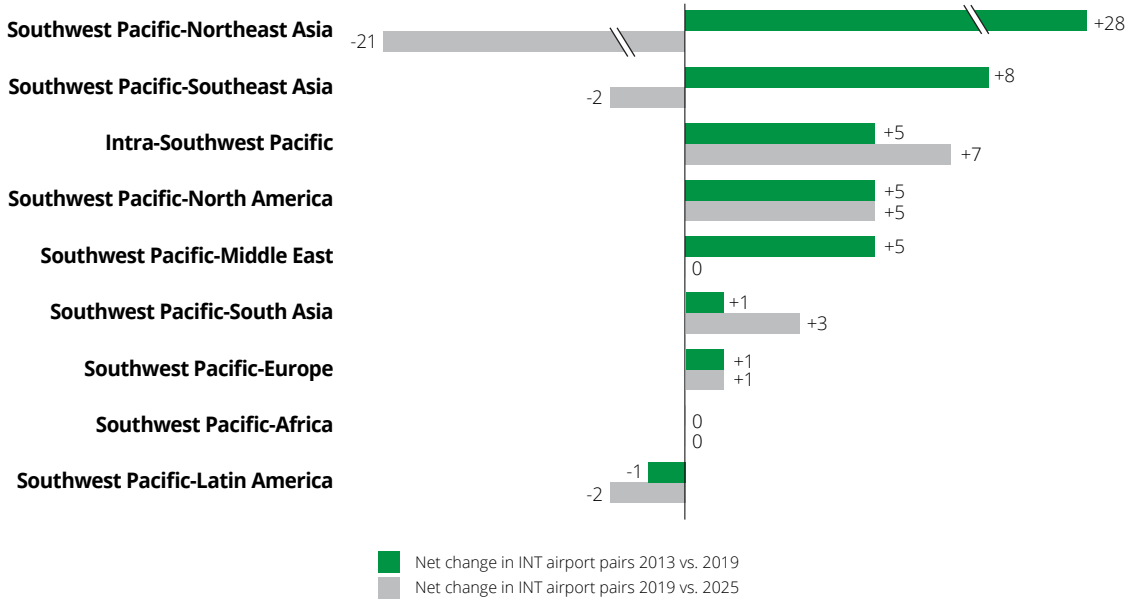
The post-pandemic landscape reveals a more complex picture. Comparing 2019 with 2025, Australia experienced a modest net loss of 5 international airport pairs, whereas New Zealand continued to grow with a gain of 3 pairs. Regionally, the Southwest Pacific saw selective growth in long-haul connections, adding airport pairs to North America (+5), South Asia (+3), and Europe (+1).

However, the most notable decline was a loss of 21 International airport pairs with Northeast Asia, largely driven by the prolonged closure of Mainland China's international borders and evolving travel patterns within the Asia Pacific region. Other connections, such as with Southeast Asia, declined slightly (–2), while connections with the Middle East and Africa remained stable. Meanwhile, intra-Southwest Pacific connectivity continued to grow, adding 7 new airport pairs since 2019 (see Figure 38 and 39).

Overall, while the Southwest Pacific region faced some setbacks post-pandemic, especially with Northeast Asia, its longer-term growth trajectory and sustained expansion into key long-haul markets highlight its enduring role in global aviation networks.

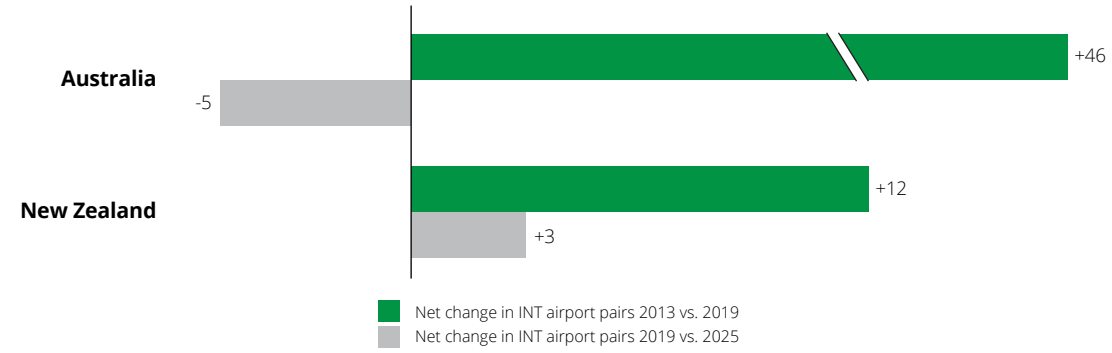
[14] For the purposes of market-level analysis and the unserved routes assessment, the focus is specifically on Australia and New Zealand.

Figure 38: Southwest Pacific's net change in international airport pairs by region, 2013-2019 and 2019-2025



Source: OAG

Figure 39: Southwest Pacific markets' net change in international airport pairs, 2013-2019 and 2019-2025



Source: OAG

Figure 40: International routes gained (+89, in green) and lost (-37, in red) to, from, and within Southwest Pacific over the 2013–2019 period (for a net gain of 52)

Source: OAG

Source: OAG

Figure 41: International routes gained (+53, in green) and lost (-62, in red) to, from, and within Southwest Pacific over the 2019-2025 period (for a net loss of 9)

Source: OAG

Source: OAG

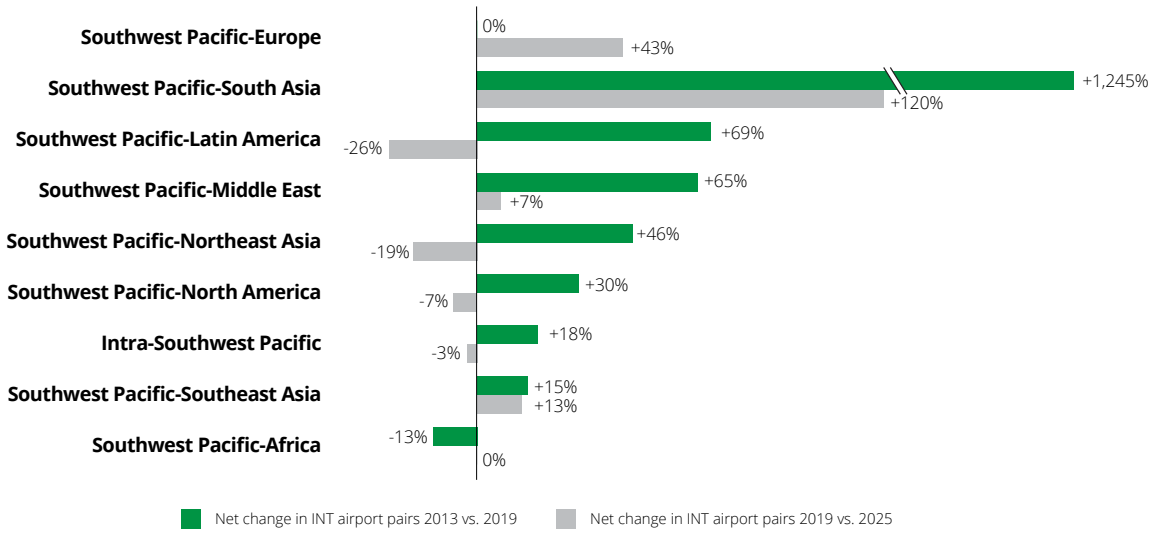
Insights Based on Scheduled Seat Data

International seat capacity trends highlight a nuanced shift in Southwest Pacific connectivity. Between 2013 and 2019, seat capacity grew strongly on several long-haul routes, including a 65% increase with the Middle East, 30% with North America, and 46% with Northeast Asia. Latin America saw an even more dramatic rise of 69% during this period.

From 2019 to 2025, however, the region experienced a more mixed performance. While seat capacity between Europe and the Southwest Pacific surged by 43%, and the Middle East continued to expand modestly by 7%, capacity on routes with Northeast Asia declined by 19%. Reductions also occurred on connections with North America (–7%) and Latin America (–26%). Intra–Southwest Pacific seat capacity also fell by 3%, reflecting a more cautious regional demand environment (see Figure 42).

These patterns suggest that airlines are selectively redirecting resources toward certain long-haul markets such as Europe and the Middle East, while some traditional markets, especially within the Americas and Asia, face ongoing challenges in the post-pandemic recovery phase.

Figure 42: Southwest Pacific's net change in international seat capacity by region, 2013-2019 and 2019-2025



Source: OAG

Top Unserved International Routes (Select Markets)

We analyzed unserved international routes using 2024 passenger demand data sourced from OAG's Booking dataset. We measured the average annual one-way OD demand in terms of PDEW, capturing total passenger volumes between airport pairs (regardless of whether travel was direct or involved connections).

This demand was then compared against direct flight schedules from OAG for the same period to identify routes with no nonstop service. The methodology enabled the identification of top unserved routes in each region, revealing high-demand markets that remain unserved by direct air connectivity.

Key findings include:

- Both Australia and New Zealand show significant unserved demand to major European cities such as London, Frankfurt, and Amsterdam. South Asia also features prominently, with high PDEW to cities like Delhi, Mumbai, and Kathmandu.
- Several top unserved routes—including Frankfurt, Istanbul, Delhi, Manila, and Bangkok—were operated pre-pandemic but have not resumed. These routes present possible opportunities for service restoration as demand rebounds.
- Despite strong regional ties, major Asian gateways such as Shanghai, Bangkok, and Manila remain unserved from Australia or New Zealand, highlighting missed opportunities to reconnect with key Asian cities.

Australia

Rank	Airport Code	Airport Name, City	Market	PDEW
1	KTM	Tribhuvan International Airport, Kathmandu	Nepal	290
2	SHA	Shanghai Hongqiao International Airport, Shanghai	Mainland China	253
3	MAN	Manchester Airport, Manchester	United Kingdom	225
4	AMS	Schiphol Airport, Amsterdam	Netherlands	223
5	FRA*	Frankfurt Airport, Frankfurt	Germany	217
6	DUB	Dublin Airport, Dublin	Ireland	193
7	ATH	Athens International Airport, Athens	Greece	182
8	JFK	John F. Kennedy International Airport, New York	U.S.	182
9	LGW	London Gatwick Airport, London	United Kingdom	170
10	IST*	Istanbul Airport, Istanbul	Turkey	166

**Note: Destination previously served but unserved in 2025.*

Source: OAG

New Zealand

Rank	Airport Code	Airport Name, City	Market	PDEW
1	LHR	London Heathrow Airport, London	United Kingdom	297
2	DEL*	Indira Gandhi International Airport, Delhi	India	180
3	MNL*	Manila Ninoy Aquino International Airport, Manila	Philippines	162
4	BKK*	Bangkok Suvarnabhumi International Airport, Bangkok	Thailand	110
5	FRA	Frankfurt Airport, Frankfurt	Germany	70
6	BOM*	Mumbai Chhatrapati Shivaji Maharaj International Airport, Mumbai	India	69
7	CDG	Charles de Gaulle Airport, Paris	France	69
8	AMS	Schiphol Airport, Amsterdam	Netherlands	64
9	JNB	Johannesburg O.r. Tambo International, Gauteng	South Africa	53
10	CMB	Colombo Bandaranaike International Airport, Colombo	Sri Lanka	51

**Note: Destination previously served but unserved in 2025.*

Source: OAG

Using OAG's booking data, we analyzed passenger itineraries to identify key connecting hubs for routes that were previously served but are now unserved. The tables below highlight the top three connecting airports by destination region, along with the share of OD demand each hub captures. OD demand refers to the total number of passengers traveling between two cities or airports, regardless of the route or connections they take.

Destination's region from Southwest Pacific	Percentage of total region flow demand (%)		
	1st connecting airport	2nd connecting airport	3rd connecting airport
Southeast Asia	SYD (41%)	BNE (16%)	SIN (11%)
Northeast Asia	CAN (42%)	XMN (36%)	HKG (12%)
South Asia	SIN (26%)	KUL (23%)	BKK (17%)
Europe	DXB (32%)	SIN (20%)	DOH (19%)
North America	LAX (33%)	AKL (25%)	HKG (12%)
Africa	SYD (68%)	DXB (12%)	SIN (7%)

**Note: Destination previously served but unserved in 2025.*

Source: OAG

Sydney (SYD) dominates connectivity to both Southeast Asia (41%) and Africa (68%), showcasing its role as a major southern transit gateway. In Northeast Asia, mainland Chinese hubs Guangzhou (CAN) and Xiamen (XMN) account for a combined 78% of connections, reflecting strong regional ties. Singapore (SIN) consistently ranks as a top connector to South Asia, Europe, and Africa, while Dubai (DXB) and Doha (DOH) maintain a firm grip on long-haul routes to Europe. In North America, Los Angeles (LAX) and Auckland (AKL) emerge as primary transit points, especially for Oceania-originating traffic.

Appendix : List of Asia Pacific markets by sub-region

Southeast Asia: Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Philippines, Singapore, Thailand, Vietnam, Timor-Leste, and Cocos (Keeling) Islands.

Northeast Asia: Mainland China, Taiwan, Republic of Korea, Democratic People's Republic of Korea, Japan, Macao SAR, Hong Kong SAR, and Mongolia.

Central Asia: Kazakhstan, Uzbekistan, Kyrgyzstan, Tajikistan, and Turkmenistan.

South Asia: Afghanistan, Nepal, Pakistan, Sri Lanka, Bhutan, Maldives, Bangladesh, and India.

Southwest Pacific: American Samoa, Australia, Christmas Island, Cook Islands, Fiji, French Polynesia, Guam, Kiribati, Marshall Islands, Micronesia, Nauru, New Caledonia, New Zealand, Niue, Norfolk Island, Northern Mariana Islands, Palau, Papua New Guinea, Samoa, Solomon Islands, Tonga, Tuvalu, Vanuatu, and Wallis and Futuna Islands.

Note: We considered Russian airports to be part of geographical Europe for this study's purposes.

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