AIR MAIL 2024: THE AIR BACKBONE OF THE POST

Mail grew slowly, peaked at year-end, flowed towards Latin America and travelled mostly in passenger holds.

2,072 M ↑ +4.3%
international mail tonne-km (MTK)

+6.9%
mail tonnes on corridors, vs +14.9% freight

29%
of annual mail flies in the fourth quarter

88%
of MTK performed by passenger aircraft

1 · GROWTH
Mail grew at a third of the pace of freight

International MTK	+4.3%
International FTK	+12.0%
Mail tonnes, corridors*	+6.9%
Freight tonnes, corridors*	+14.9%

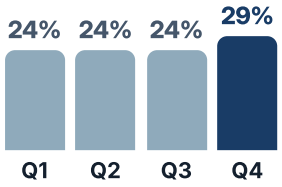
*Like-for-like, 566 airlines; excl. Canada and intra-North America.

2 · E-COMMERCE
Freight boomed where mail stood still

	MAIL	FREIGHT
China routes	0.0%	+23.8%
China – Japan	-20.0%	+18.4%
Asia-Pacific – Europe	-10.8%	+21.6%
Hong Kong SAR routes	+28.7%	+15.4%

E-commerce appears to fly as cargo: only 5.5% of US low-value shipments came by post.

3 · SEASONALITY
A sharp year-end postal peak



+23%
mail from Q3 to Q4, vs +5% for freight

2.7–3.2×
Q4 vs Q1 inbound mail in Peru, Colombia and Ecuador

Share of annual international mail by quarter, 2024.

4 · BALANCE
Latin America receives 9× what it sends

Latin America & Caribbean	-0.80
Africa	-0.29
Asia-Pacific	+0.17
North America	+0.15
Europe	+0.07
Middle East	+0.07

← receiver sender →

5 · CORRIDORS · THOUSAND TONNES, LIKE-FOR-LIKE
Growth came from the Americas and the Atlantic

Intra-Asia-Pacific	81.7	-1.1%
Europe – N. America	56.1	+14.8%
LAC – N. America	48.4	+67.4%
Intra-Europe	43.9	-6.8%
Asia-Pacific – N. America	40.7	+8.8%
Asia-Pacific – Europe	31.9	-10.8%

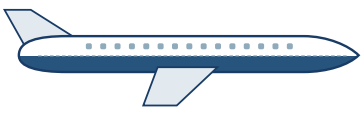
6 · WHO FLIES THE MAIL
Five States, 44% of MTK

United States	340
China*	197
Japan	167
UAE	110
Rep. of Korea	99

Million MTK. *Incl. Hong Kong and Macao SAR.

7 · HOW MAIL FLIES
Borrowed capacity: mail rides in passenger holds

BELLY HOLD · **88% of MTK**



NARROW-BODIES
19%
of mail tonnes, vs 4% of freight; 8 kg per flight

FREIGHTER MTK*
+10.7%
vs +0.7% on passenger aircraft

FRAGILE LINKS
HHI 9,994
China–Hong Kong SAR: one airline

*Like-for-like, 307 reporting airlines; freighters fill southbound legs to Latin America with mail.

Reading the data. International MTK is an official ICAO statistic. Corridor, seasonal and aircraft indicators are computed by ICAO from Forms A, B and C; estimates are 15% of mail tonnes.

Sources: ICAO Annual Report of the Council 2024; ICAO Forms A, A-S, B, C; US CBP; UPU. Flow orientation = (sent − received) ÷ (sent + received); HHI = sum of squared carrier shares. Companion to *Air Cargo 2024*.