

DIRECTORATE OF ECONOMIC REGULATION

AIR TRANSPORT MONTHLY MONITOR: AUG. 2026

[ATMM/08/2026]

Air Transport Monthly Monitor [ATMM] is a monthly digest of air transport sub-sector meant to share events that happened during the month in question both in local and global perspective. The publication highlights significant events occurring during the month and provides analytical perspectives on implication for aviation sector development, connectivity, competition and economic growth.

Traffic Statistics:

Passengers, Aircraft Movements and Cargo (Overall/Totals)

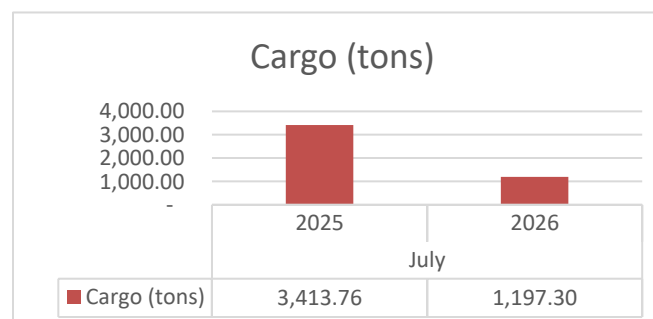
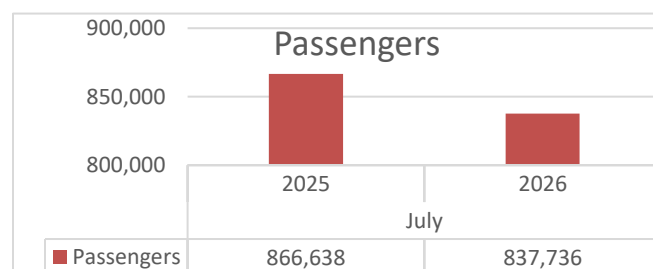
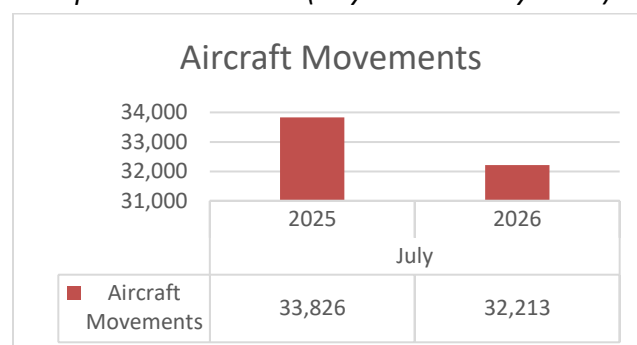
	July	
	2025	2026
Aircraft movements	33,826	32,213
Passengers	866,638	837,736
Cargo (tons)	3,413.76	1,197.3

Source: TCAA Statistics

Air transport sector recorded mixed performance in July 2026, with aircraft movements declining by 4.8%, from 33,826 movements in July 2025 to 32,213 movements. Passenger traffic also recorded a decline during the period of July, decreasing by 3.3% from 866,638 passengers in July 2025 to 837,736 passengers in July 2026. Air cargo performance recorded a significant decline of 64.9%, decreasing from 3,413.76 tons in July 2025 to 1,197.30 tons in July 2026.

Analyst Viewpoint: The aviation sector in Tanzania recorded a challenging performance in July 2026, with declines observed across aircraft movements, passenger traffic, and cargo volumes. The reduction in aircraft movements and passenger traffic suggests a moderation in aviation activity and travel demand, while the substantial decline in cargo volumes indicates a significant slowdown in air freight operations. Overall, the July performance points to temporary operational and demand side pressures, highlighting the need for continued monitoring to determine whether the declines represent short-term fluctuations or a broader slowdown in the sector.

Graphical illustration (July 2025 Vs July 2026)



DIRECTORATE OF ECONOMIC REGULATION

AIR TRANSPORT MONTHLY MONITOR: AUG. 2026

[ATMM/08/2026]

Digitalization Supports Efficient Industry Services

Tanzania's aviation sector continues to embrace digital transformation as part of efforts to improve service delivery and strengthen engagement with industry stakeholders. During the Fourth International Conference on Transport and Logistics held in Dar es Salaam on 20 – 21 August 2026, the Tanzania Civil Aviation Authority (TCAA) showcased its role in regulating and developing the country's aviation sector, with particular emphasis on the use of modern technology in improving service delivery. The Authority highlighted electronic service system known as Civil Aviation Services Portal (CASP), designed to enable aviation stakeholders to access services more quickly and efficiently.

CASP provides a single window platform through which organizations and individual aviation professionals can submit regulatory applications, upload supporting documents, make secure electronic payments, track application progress and manage licenses, permits and certificates from a centralized account. The initiative is relevant to a broad range of aviation stakeholders, including air operators, ground handling service providers, aerodrome operators and other aviation service organizations.

CASP incorporates electronic workflow and document management, automated notifications, dashboards and real time reporting, with the objective of improving service delivery, regulatory oversight, operational efficiency, transparency and accountability. Improved digital access to regulatory and operational services can contribute to more efficient coordination between the regulator and industry participants. In an increasingly dynamic aviation environment, timely access to information and services remains important for supporting safe, efficient and reliable operations.

Analyst Viewpoint: Tanzania's growing emphasis on digitalization and stakeholder engagement reflects the increasing importance of technology in modern aviation. Enhanced digital service platforms and stronger coordination between the regulator and industry stakeholders can support more efficient service delivery, streamlined regulatory processes and improved operational engagement across air and ground aviation activities.

African Aviation Records Continued Passenger Demand Growth

The International Air Transport Association (IATA) reported that, in July 2026, African airlines recorded a 5.2% year on year increase in total passenger demand, while capacity increased by 7.3%. The regional passenger load factor stood at 75.1%. For international passenger markets, African airlines recorded a 6.4% increase in demand, with capacity increasing by 9.0% and a load factor of 74.1%. The figures indicate continued growth in demand for air travel to, from and within Africa, although capacity expanded faster than demand during the month. Africa accounted for approximately 2.2% of global passenger traffic, underlining both the continent's relatively small current market share and its significant long term growth potential.

Analyst Viewpoint: The continued growth in African passenger demand provides a positive outlook for the development of connectivity across the continent. However, the faster increase in capacity relative to demand highlights the need for airlines and regulators to support sustainable network development, operational efficiency and competitive market conditions. Tanzania can benefit through expanded intra African connectivity, tourism and trade, particularly where infrastructure and regulatory cooperation support new and sustainable services.

DIRECTORATE OF ECONOMIC REGULATION

AIR TRANSPORT MONTHLY MONITOR: AUG. 2026

[ATMM/08/2026]

Global Aviation Focuses on Operational Resilience, Fuel Costs and Technology.

Global aviation developments during August 2026 continued to emphasize operational resilience, cost pressures and the role of technology. IATA highlighted the significant impact of higher jet fuel prices and currency movements on airline costs, while also noting the importance of data and technology in improving operational efficiency. Industry discussions also continued to focus on sustainable aviation fuel, aircraft delivery delays and the efficiency of air traffic management systems.

These developments demonstrate that aviation competitiveness increasingly depends on factors beyond fleet expansion. Airlines and regulators must respond to fuel price volatility, supply chain constraints, infrastructure limitations and growing technological requirements while maintaining high standards of safety and security.

Analyst Viewpoint: For Tanzania and other emerging aviation markets, long-term competitiveness will depend on combining infrastructure development with investment in human resources, digital systems and effective regulation. Strengthening resilience to external shocks, improving operational efficiency and supporting innovation will be important in ensuring that sector growth translates into sustainable economic and connectivity benefits.