

DIRECTORATE OF ECONOMIC REGULATION

AIR TRANSPORT MONTHLY MONITOR: JULY 2026

[ATMM/07/2026]

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.

Analyst Viewpoint: Aviation sector in Tanzania demonstrated overall resilience in June 2026, with increased aircraft movements and cargo volumes indicating stronger operational activity and trade related demand. Although passenger traffic recorded a slight decline, the marginal change suggests short term fluctuations rather than a broader slowdown, as underlying sector growth remains supported by improved connectivity and expanding airline operations.

Traffic Statistics:

Passengers, Aircraft movements and Cargo (Overall/Totals)

	June	
	2025	2026
Aircraft movements	23,955	25,350
Passengers	680,798	677,914
Cargo (tons)	3,489.66	3,673.67

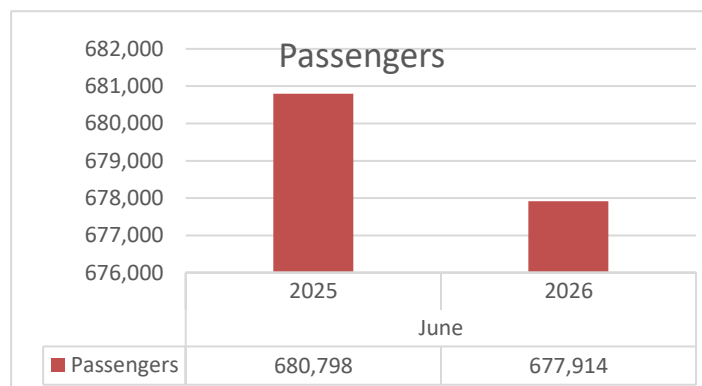
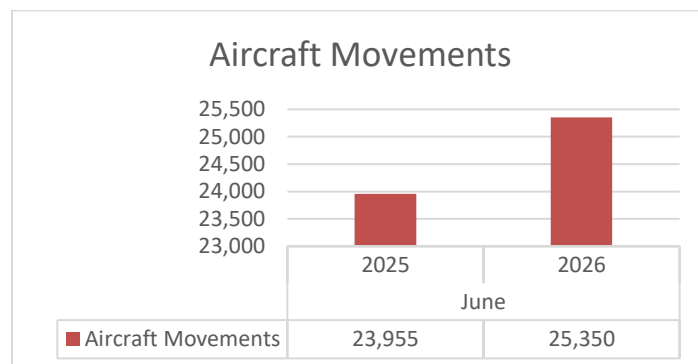
Source: TCAA Statistics

Air transport sector recorded positive operational growth in June 2026, with aircraft movements increasing by 5.8% from 23,955 movements in June 2025 to 25,350 movements.

Air cargo performance also recorded improvement during the period under review, increasing by 5.3% from 3,489.66 tons to 3,673.67 tons.

Passenger traffic recorded a marginal decline of 0.4% decreasing from 680,798 passengers in June 2025 to 677,914 passengers in June 2026.

Graphical illustration (June 2025 Vs June 2026)



ling with a cash flow crunch, we kept on investing on our routes with a view to maintaining **ATCL**

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Air Tanzania Company Limited (ATCL) Launches Direct Flights to Oman following Regulatory Approval

ATCL reached another significant milestone in its international network expansion after receiving approval from the Civil Aviation Authority (CAA) of the Sultanate of Oman to commence scheduled passenger services between Muscat and the Tanzanian cities of Dar es Salaam and Zanzibar. The approval paved the way for the launch of three weekly flights, with commercial operations commenced on 25 July 2026. The route operates Muscat – Dar es Salaam – Zanzibar, providing a direct air link between the two countries and strengthening connectivity between East Africa and the Gulf region. The service is expected to support growing demand from tourists, business travelers, investors and the Tanzanian diaspora residing in Oman while facilitating bilateral trade and economic cooperation. The introduction of Muscat into ATCL international network complements the airline's broader strategy of expanding services to key regional and intercontinental markets. Oman represents an important aviation gateway to the Middle East and Asia, providing passengers with additional travel options and enhancing Tanzania's accessibility to international markets.

The new service also reflects increasing confidence in Tanzania's aviation sector and demonstrates the airline's continued efforts to strengthen its position as the national carrier by diversifying destinations and improving international connectivity.

Analyst Viewpoint: The launch of ATCL's direct Muscat service strengthens Tanzania's connectivity with the Gulf region, supporting tourism, business, trade and investment. The new route will enhance passenger convenience, expands market access for exporters and contributes to the Government's vision of positioning Tanzania as a regional aviation hub while supporting the airline's long-term international growth strategy.

IATA Calls for Greater Aviation Investment Across Africa.

IATA has called on African governments to accelerate investment in aviation infrastructure and implement policies that support sustainable industry growth. According to IATA's latest available passenger market data, African airlines recorded a 6.6% year-on-year increase in passenger demand in May 2026, while available seat capacity increased by 7.0%, resulting in a 73.7% passenger load factor. Although Africa accounts for only 2.2% of global passenger traffic, the continent continues to demonstrate strong long term growth potential driven by increasing tourism, trade and regional economic integration. IATA emphasized that improving airport infrastructure, harmonizing aviation regulations, reducing excessive taxes and charges and accelerating implementation of the Single African Air Transport Market (SAATM) remain critical to unlocking Africa's aviation potential. The Association noted that these measures would strengthen intra African connectivity, enhance airline competitiveness and stimulate economic development across the continent.

Analyst Viewpoint: Africa continues to account for a relatively small proportion of global air transport despite its rapidly growing population and expanding economy. Increased implementation of the Single African Air Transport Market (SAATM) and African Continental Free Trade Area (AfCFTA), together with investments in airport infrastructure and safety oversight, will enhance intra African connectivity, reduce travel costs and stimulate regional trade. Tanzania stands to benefit from these developments through expanded route networks and increased tourism arrivals.

Global Aviation Continues to Invest in Skills, Technology and Operational Efficiency.

The global aviation industry continues to invest in technology, workforce development and operational resilience. Airlines, regulators and

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training institutions are increasingly focused on digital transformation, operational efficiency, sustainable aviation practices and artificial intelligence applications to improve safety and customer service. Industry stakeholders also continue preparations for future growth in passenger demand through investments in modern aircraft, airport infrastructure and workforce development. Emerging technologies such as artificial intelligence and advanced data analytics are increasingly being explored to improve operational decision making while maintaining aviation safety.

Analyst Viewpoint: *The future competitiveness of the aviation industry will depend not only on fleet expansion but also on digital transformation, workforce competence and regulatory readiness. Civil aviation authorities are expected to strengthen oversight of emerging technologies while ensuring that innovation supports, rather than compromises aviation safety and security. Tanzania's continued investment in aviation training and institutional capacity positions the country to benefit from these global technological developments.*