DIRECTORATE OF ECONOMIC REGULATION
AIR TRANSPORT MONTHLY MONITOR: SEPT. 2026 [ATMM/09/2026]

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 implications for aviation sector development, connectivity, competition and economic growth.

Analyst Viewpoint: *There has been an overall positive performance in the sector for the month of August 2026 compared to the same period last year. This shows an increasingly demand for air transport services in the country.*

Traffic Statistics:

Passengers, Aircraft Movements and Cargo (Overall/Totals)

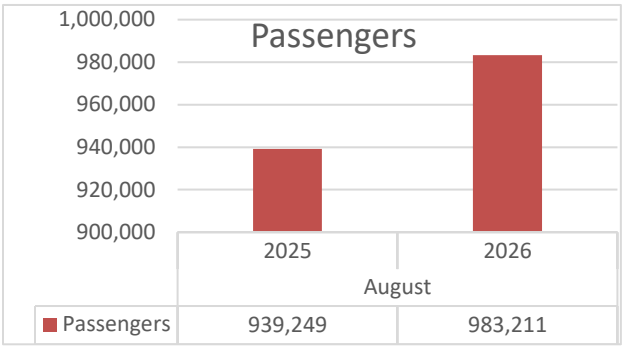
	August	
	2025	**2026**
Aircraft movements	36,550	38,176
Passengers	939,249	983,211
Cargo (tons)	3,512	3,630

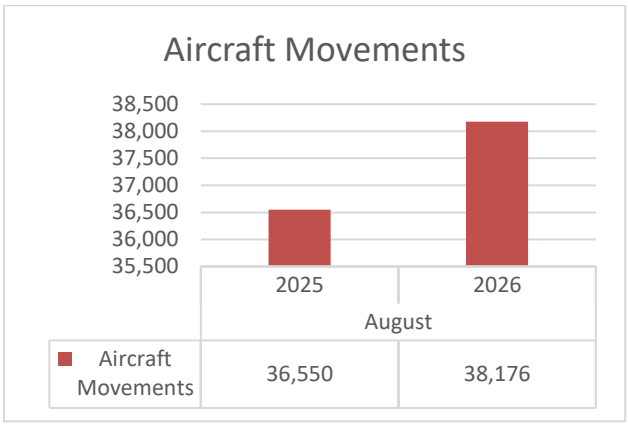
Source: *TCAA Statistics*

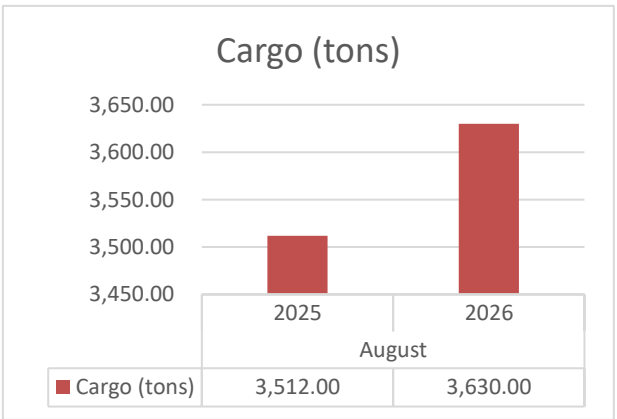
Air transport sector recorded positive performance in August 2026, with aircraft movements increasing by 4.4%, from 36,550 movements in August 2025 to 38,176 movements in August 2026.
Passenger traffic also recorded an increase during the period of August, rising by 4.7% from 939,249 passengers in August 2025 to 983,211 passengers in August 2026.

Air cargo performance similarly recorded an increase of 3.4%, rising from 3,512 tons in August 2025 to 3,630 tons in August 2026.

Graphical illustration (August 2025 Vs August 2026)







Directorate of Economic Regulation
Business Analysis & Forecasting Section

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BASAs and Airspace Modernization Strengthen Connectivity.

September 2026 highlighted two complementary drivers of Tanzania's air connectivity and market access through Bilateral Air Services Agreements (BASAs) and more efficient use of airspace. BASAs provide the legal framework and traffic rights that allow designated airlines to open or expand international services. TCAA noted that recent market developments include services by Brussels Airlines, Airlink, Etihad Airways, Neos and EgyptAir through Dar es Salaam, Kilimanjaro and Zanzibar. EgyptAir also introduced direct Cairo - Zanzibar flights from September 2026, widening access between Tanzania and North Africa and strengthening onward connectivity through Cairo.

TCAA supports implementation of BASAs by administering traffic rights, issuing the required regulatory approvals and ensuring compliance with applicable safety and operating requirements. For the economy, improved international connectivity can reduce travel time, broaden tourism source markets and support trade and investment. The commercial benefit, however, depends on sustainable demand, suitable schedules, competitive operating costs and reliable airport and air navigation services. The connectivity agenda was reinforced by Tanzania's hosting of the AFI User Preferred Routes Trials Workshop and Free Route Airspace Project Management Team Meeting from 21-24 September 2026. Free Route Airspace allows operators greater flexibility to plan preferred flight paths while meeting safety, capacity and operational requirements. More efficient routing can support lower operating inefficiency, better airspace utilization and improved environmental performance.

Analyst Viewpoint: *Connectivity policy works best when traffic rights and airspace efficiency advance together. New international services can widen tourism, trade and investment access while flexible routing can reduce operational inefficiency. Route sustainability will still depend on demand, load factors, schedule quality, cost control and consistent safety oversight.*

Tanzania strengthens air Navigation services at key Tourism Airstrips

The Government of Tanzania, through TCAA, continued strengthening air navigation services at Mikumi, Kogatende and Seronera airstrips during September 2026. The three airstrips, operated by the Tanzania National Parks Authority (TANAPA) play an important role in facilitating air access to major tourism destinations.

During an inspection conducted on 24 September 2026, the National Civil Aviation Safety Committee noted that the airstrips had been equipped with Automated Weather Stations (AWS). The systems provide essential meteorological information to support flight planning and safe aircraft operations, particularly in areas where weather conditions can change rapidly.

Analyst Viewpoint: *Improved air navigation and meteorological services at tourism airstrips can strengthen both aviation safety and the competitiveness of Tanzania's tourism sector. Reliable weather information supports better operational decision-making, reduces exposure to weather-related disruptions and improve the reliability of scheduled and charter services serving national parks. Continued investment in airstrip infrastructure and supporting navigation services will therefore be important as Tanzania seeks to accommodate growing tourist traffic while maintaining high safety standards.*

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Expansion of Flightlink's Fleet

On 11 September, Flightlink announced an order for four new Cessna 208B Grand Caravan EX aircraft from Africair. Two aircraft were expected in the fourth quarter of 2026 and the remaining two in the third quarter of 2027.

> ***Analyst Viewpoint:*** *Increased fleet by Flightlink works to expand* domestic and regional capacity, improved safari connectivity and potential growth in tourism-related air transport.

Zanzibar Airport Infrastructure Development

A September industry report indicated that Terminal 2 at Abeid Amani Karume International Airport had reached 90% completion. The USD 34 million terminal is designed to handle 1.4 million passengers annually. The new apron was at 25% completion, while the Terminal 2–Terminal 3 link bridge was at 55%.

> ***Analyst Viewpoint:*** *The development is important aspect for a*irport capacity expansion, passenger-handling efficiency and tourism growth. The actual commissioning status of Terminal 2 should be verified before publication.

Global Highlights:

IATA Reviews:

African Demand Grows, but Capacity Expands Faster

IATA reported that African airlines recorded 4.4% year on year growth in total passenger demand in August 2026, while capacity increased by 7.2%. The regional passenger load factor versus the proportion of available seat kilometers used stood at 77.5%. In international markets, African airline demand rose by 6.7%, compared with 8.3% growth in capacity and the load factor was 78.4%. Air cargo demand also grew by 3.0%, but cargo capacity increased by 14.0%. The figures point to continued market growth, while also showing that capacity is being added faster than traffic in both passenger and cargo segments.

> ***Analyst Viewpoint:*** *Africa's continued traffic growth is positive for connectivity, but capacity is rising faster than demand. If that gap persists, load factors and yields may come under pressure. For Tanzania, network expansion should therefore remain demand led and be coordinated with tourism, trade, airport capacity and regional regulatory cooperation so that additional frequencies translate into sustainable connectivity rather than excess capacity.*

Passenger Demand Softens as Cargo and Costs Rise

Global aviation presented a mixed picture in August 2026. IATA reported that passenger demand, measured by revenue passenger kilometers, declined by 0.8% year on year while capacity increased by 0.3%; the global passenger load factor remained high at 85.1%. Excluding Middle Eastern carriers, global passenger demand still grew by 0.6%, showing that geopolitical disruption remained an important part of the headline decline. Air cargo was more resilient, global cargo demand increased by 4.4% while capacity edged down by 0.1%, lifting the cargo load factor. At the same time, jet fuel prices rose by 8.3% from July and were 79.2% higher than a year earlier. For airlines, the combination of softer passenger growth and much higher fuel costs increases pressure on route economics, fares and margins. For Tanzania, resilient cargo demand can create opportunities for time sensitive and high value exports, provided handling, cold chain and logistics systems are reliable.