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Europe's airport 2020 passenger traffic back to 1995 levels

"No industry can on its own withstand such a shock" says ACI EUROPE chief

- 1.72 billion passengers lost in 2020
- EU airports most impacted compared to non-EU ones – due to smaller size of their domestic markets and tighter lockdowns/travel restrictions
- Russian and Turkish airports most resilient - with Istanbul & Moscow hubs replacing Western European hubs as the busiest European airports by Q4
- Freight traffic back in positive territory as of December 2020

Brussels, 12 February 2021: European airport trade association, ACI EUROPE today releases its traffic report for the Full Year 2020, revealing the full extent of the devastation suffered by Europe's airports as a result of the COVID-19 pandemic. This is the only air traffic report that includes all types of commercial flights to, from and within Europe (full service, low cost, regional, charter, full freight and others).

Europe's airports lost **1.72 billion passengers** in 2020 compared to the previous year, a decrease of **-70.4%**.

Olivier Jankovec, Director General of ACI EUROPE commented: *"With just 728 million passengers in 2020 compared to 2.4 billion passengers in the previous year, Europe's airports were back to their traffic levels of 1995. No industry can on its own withstand such a shock. While some States have taken steps to financially support their airports, only €2.2 billion has so far been earmarked for that purpose in Europe. This is less than 8% of the revenues airports lost last year."*

"With further decreases in traffic over the past weeks and no recovery in sight, more needs to be done. Helping out airports is essential to rebuild air connectivity and effectively support local and regional communities and tourism. It is also critical to restore airports' investment capabilities for the future. Without more financial support, investments in decarbonisation, digitalisation and SESAR are at risk."

EU airports hardest hit

EU airports (-73% & 1.32 billion passengers lost) were significantly more impacted than those in the **non-EU bloc (-61.9% & 400 million passengers lost)**. This is mainly due to the size and relative resilience of domestic markets primarily in Russia but also Turkey, combined with less stringent lockdowns and travel restrictions compared to the EU market.

The distinct performance between the EU and non-EU market became apparent in the second half of the year. While both EU and non-EU airports saw passenger traffic coming to an almost stand still in Q2 (respectively -97.3% and -93.3%), losses in **Q4** stood at **-83.8% at EU airports compared to -63.9% at non-EU airports**. Again, this mainly resulted from the relative resilience of domestic passenger traffic in the non-EU market (-39.8%) compared to the EU market (-72.9%), although non-EU airports also outperformed EU ones for international passenger traffic (respectively -78.2% and -86.6%).

Within the EU, limited variations in extreme passenger traffic losses also reflected the size of domestic markets and/or the extent of lockdowns and travel restrictions.

As a result, in **Q4** airports in Austria, Czech Republic, Finland, Hungary, Ireland, Slovenia and Slovakia were still seeing passenger traffic below -90% - with German and UK airports following closely (-87.9% and -86.6%). At the other end of the (narrow) spectrum, airports in Bulgaria (-69%), France (-78.1%), Greece (-72.1%) and Portugal (-77.2%) slightly outperformed the EU average.

Outside the EU, airports in the larger Russian (-44.2%) and Turkish (-60.7%) markets proved the most resilient in **Q4**, with those in Iceland (-96.2%) and Georgia (-94.8%) being the most impacted.

All segments of the airport industry were almost equally impacted in 2020 in terms of passenger traffic losses, from the **Majors (top 5 European airports)** at **-71.3%** to **smaller regionals** at **-69.4%**.

Top 5 major hubs unrecognisable

The 5 hubs listed as **Majors** in 2019 - London-Heathrow, Paris-CDG, Amsterdam-Schiphol, Frankfurt and Istanbul - lost **250 million passengers** in 2020. Frankfurt (-73.4%) posted the largest decrease, closely followed by London-Heathrow (-72.7%), Amsterdam-Schiphol (-70.9%), Paris-CDG (-70.8%) and Istanbul (-59.6%).

By Q4, only Istanbul remained in the top league. The Turkish hub had by then become the busiest European airport, followed by Istanbul-Sabiha Gokcen (n.2), Moscow-Sheremetyevo (n.3), Moscow-Domodedovo (n.4) and Moscow-Vnukovo (n.5).

Freight recovering by year end

Freight traffic at Europe's airports fell by **-11.8%** in 2020 compared to the previous year, with the loss almost equally distributed between EU airports (-12.1%) and non-EU airports (-9.9%). The recovery in freight traffic accelerated as of last September, with December seeing a marginally positive result (+0%).

Amongst the top 10 European airports for freight, volume increases were registered only by Liège (+23%), Leipzig-Halle (+12%), Luxembourg (+6%) and Koln-Bonn (+5%).

Aircraft movements

Aircraft movements across the European airport network decreased by **-58.6%** in 2020 compared to the previous year.

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ACI EUROPE is the European region of Airports Council International (ACI), the only worldwide professional association of airport operators. ACI EUROPE represents over ***500 airports*** *in 45 European countries. Our members facilitate over 90% of commercial air traffic in Europe:* ***2.5 billion passengers****,* ***20.7 million tonnes of freight*** *and* ***25.7 million aircraft movements*** *in 2019. In response to the Climate Emergency, in June 2019 our members committed to achieve* ***Net Zero*** *carbon emissions for operations under their control* ***by 2050****, without offsetting.*