

# Air traffic resumed upward trajectory in February; mixed outlook now lies ahead

## ACI EUROPE

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**Brussels, 06 April 2022:** European airport trade body, ACI EUROPE, today released its air traffic report for February 2022.

The report shows that after 2 months during which the recovery stalled due to the COVID-19 Omicron wave, passenger traffic resumed an upward trajectory in **February**. Accordingly, compared to pre-pandemic (2019) levels, passenger volumes across the **European airport network** stood at **-39%** during the month, up from -45.7% in January.

**Olivier Jankovec, Director General of ACI EUROPE** commented: *"Improvements to passenger traffic in February reflected the fact that States started to ease restrictions as the Omicron wave subsided, both at local level and those relating to travel. Since then, most restrictions to intra-European travel have been lifted and more external markets are opening up - meaning the traffic recovery has gathered steam.*

*The outlook for the Easter holidays and into the Summer months is strong, but staff shortages, high traffic peaks and ATM capacity issues are starting to put strain on operations and to impact quality. Above all, there is no escaping the fact that the war in Ukraine has devastated the country's airports and that it also comes with significant downside risks for European air traffic."*

All data reported below are against pre-pandemic (2019) corresponding periods.

## EU+ MARKET IMPROVING FASTER THAN REST OF EUROPE

Airports in the **EU+ market** saw passenger traffic recovering to **-42.4%** during February, up from -51.1% in the previous month. The performance gap between national markets remained significant, mostly due to the lack of alignment on both the extent and timing of the easing of Omicron-related restrictions, but also increasing competitive dynamics.

Airports in Portugal (-23.7%), Spain (-26.8%), Luxembourg (-27.7%), Croatia (-28.9%) and Ireland (-33.8%) posted the best performance. Conversely, those in Slovenia (-63.9%), Germany (-59.6%), Sweden (-59%), Finland (-57.5%) and the Czech Republic (-55.4%) registered the largest declines.

In the **rest of Europe**, passenger volumes were at **-20.6%** in February, up from -23.8% in January. Airports in Uzbekistan (+52.7%), Albania (+21.9%) and Kosovo (+13%) clearly stood out, while those in Russia

(0%) had just completed their full recovery. Airports in Turkey (-27.3%) and Georgia (-29%) posted similar results, while those in Belarus kept being heavily impacted (-59.3%) by EU sanctions.

## MAJORS STILL UNDERPERFORMING

The **Majors** (Top 5 European airports) saw passenger traffic at **-43%** in February, up from -48.5% in January<sup>1</sup>.

Istanbul (-26.6%) remained the busiest European airport, followed by Paris-CDG (-42.3%), Madrid-Barajas Adolfo Suarez (-30.7%), London-Heathrow (-47.8%) and Amsterdam-Schiphol (-45.1%).

The permanence of severe travel restrictions on many intercontinental markets - in particular Asia - also weighed on other large hubs: Munich (-61.5%), Helsinki (-60.2%), Frankfurt (-53.4%) and Zurich (-51.8%). Meanwhile, those hubs relying predominantly on the Americas such as Dublin (-33.9%) and Lisbon (-25.4%) benefitted from the restart of the transatlantic market.

## REGIONAL & SMALLER AIRPORTS OUTPERFORMING

With passenger traffic at **-28.6%** in February compared to -38% in January, **smaller regional airports** posted the best performance amongst the different segments of the airport industry.

More generally, the ability of LCCs to quickly redeploy capacity and the fact that the recovery remains largely driven by leisure and VFR demand saw selected regional and smaller capital airports significantly outperform the European average including: Batumi (+38.1%), Oradea (+12.7%), Ajaccio (-3.5%), Palermo (-7.4%), Antwerp (-10.1%), Lanzarote (-10.6%), Tenerife-South (-13.9%), Charleroi (-14.5%), Montpellier (-14.6%), Bergamo (-15.8%), Zagreb (-17.9%), Krakow (-23.2%), Antalya (-27.0%), Nice (-26.3%) and Budapest (-36.2%).

## FREIGHT & MOVEMENTS

Freight traffic across the European airport network also improved significantly in February at **+10.6%**, up **from -8.6%** in January. Aircraft movements stood at -32.8% in February compared to -42.1% in the preceding month.

During February, airports welcoming more than 25 million passengers per year (**Group 1**), airports welcoming between 10 and 25 million passengers (**Group 2**), airports welcoming between 5 and 10 million passengers (**Group 3**) and airports welcoming less than 5 million

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<sup>1</sup> The comparative performance of the Majors is impacted by the fact that traffic data for Moscow-Sheremetyevo (5th position in January) is no longer being reported as a result of EU sanctions.

passengers per year (**Group 4**) reported an average decline of passenger traffic compared to 2019 by **-42.9%**, **-38.1%**, **-29.5%** and **-28.6%** respectively.

**## ENDS ##**

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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 55 countries. Our members facilitate over 90% of commercial air traffic in Europe. Air transport supports 13.5 million jobs, generating €886 billion in European economic activity (4.4% of GDP). In response to the Climate Emergency, in June 2019 our members committed to achieving Net Zero carbon emissions for operations under their control by 2050, without offsetting.