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# Market surges forward as EU+ airport passenger traffic doubles year on year

## *Jankovec calls for return to 80% airport slot usage rule reflecting "critical and dynamic juncture" in the recovery from the COVID 19 pandemic*

**Brussels, 14 September 2022:** European airport trade body ACI EUROPE today released its air traffic report for July 2022.

The report shows that passenger traffic across the **European airport network** increased by **+70.4%** in **July** compared to the same month last year. This was largely driven by international traffic (+102.5%) rather than domestic traffic (+11.8%).

When compared to pre-pandemic (July 2019) levels, passenger traffic in July stood at **-14.4%** - a further improvement compared to the previous month (-17.3% in June).

### **EU+ MARKET SURGING & DRIVING PASSENGER GROWTH**

Airports in the **EU+ market**<sup>1</sup> saw their passenger traffic nearly doubling at **+94.3%** in **July** compared to the same month last year, with those in Ireland (+386.5%), the UK (+349.6%), Finland (+268.5%), Slovakia (+167.1%) and Iceland (+146.8%) seeing the highest increases.

When compared to pre-pandemic (July 2019) levels, passenger traffic at EU+ airports stood at **-14.6%** in July. Airports in Greece (+5.4%), Luxembourg (+2.2%) and Iceland (+1.7%) achieved a full recovery - closely followed by those in Portugal (-1.8%), Romania (-2.9%) and Lithuania (-3%). At the other end of the spectrum, airports in Slovenia (-39.5%), Finland (-33.7%), Bulgaria (-29.5%) and Germany (-29.5%) remained the farthest from achieving full recovery. Amongst other larger EU+ markets, the best performances came from airports in Spain (-7.9%) and Italy (-9.6%), followed by France (-13.5%) and the UK (-19.1%).

Meanwhile, passenger traffic at airports in the **rest of Europe**<sup>2</sup> only grew by **+10.8%** in **July** compared to the same month last year. This reflects the fact these airports had lost less traffic than EU+ airports last year, as well as the war wiping out all passenger traffic at Ukrainian airports, decreasing passenger traffic at airports in Belarus (-14.3%) and Russia (-8.8%) and also limiting gains for those in Moldova (+7.1%). The best performances in the non-EU+ market came from airports in Albania (+43.8%), Armenia (+38.6%), Georgia (+36.5%), North Macedonia (+35.2%) and Serbia (+35%) - followed by those in Turkey (+27.5%).

When compared to pre-pandemic (July 2019) levels, passenger traffic in the rest of Europe was almost aligned with the EU+ market in July at **-13.5%**.

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<sup>1</sup> EU, EEA, Switzerland and UK.

<sup>2</sup> Albania, Armenia, Belarus, Bosnia and Herzegovina, Georgia, Israel, Kazakhstan, Kosovo, North Macedonia, Moldova, Montenegro, Russia, Serbia, Turkey, Ukraine and Uzbekistan.

**Olivier Jankovec, Director General of ACI EUROPE** said: *"July has kept delivering a much needed boost in passenger traffic for most of Europe's airports, driven by revenge - and still predominantly leisure - travel, as well as Ultra Low Cost Carriers expanding capacity well above pre-pandemic levels. As the EU+ market has been very much driving the recovery and traffic volumes are finally getting closer to pre-pandemic levels, it is essential that the EU brings its airport slots rules back to normal - requiring airlines to effectively use these slots for 80% of the time during the forthcoming Winter season starting end of October. This is precisely what the European Commission has proposed based on a thorough market analysis - with all the necessary flexibility to duly account for travel restrictions still affecting some markets. Going back to the 80% usage rule is essential at this critical and dynamic juncture in the recovery from the COVID-19 pandemic. This is about ensuring an effective use of scarce airport capacity for the benefit of air connectivity, consumers and businesses."*

## **MAJORS & LARGE AIRPORTS IMPROVING FAST, WITH REGIONALS OUTPERFORMING**

**The Majors** (top 5 European airports) saw passenger traffic doubling **(+100.3%)** in **July** compared to the same month last year - largely driven by leisure intra-European and transatlantic demand.

- Istanbul (+61.4% compared to the same month last year) remained the busiest European airport with 6.74 million passengers. It was the only Major exceeding pre-pandemic (July 2019) passenger volumes (+5.5%).
- London Heathrow came second, with passenger volumes more than tripling (+317.8%) compared to the same month last year - followed by Paris-CDG (+97.1%).
- Amsterdam-Schiphol (+70.9%) and Frankfurt (+76.5%) came in 4<sup>th</sup> and 5<sup>th</sup> position respectively - as capacity reductions needed to mitigate operational disruptions caused by staff shortages impacted passenger volumes.

When compared to pre-pandemic (July 2019) levels, passenger traffic at the Majors in July stood at **-16.9%**, mostly a reflection of continued travel restrictions to parts of Asia.

Amongst **other hubs and large airports**<sup>3</sup>:

- Madrid (+96.6%) was less than 200 passengers short of overtaking Frankfurt.
- London-Gatwick (+677%), Manchester (+482.9%), Dublin (+366%) and London-Stansted (+258.6%) all experienced exponential growth in passenger traffic.
- When compared to pre-pandemic (July 2019) levels, predominantly leisure demand driven Paris-Orly (-1%), Palma de Mallorca (-1.8%), Athens (-4.9%) and Lisbon (-5.4%) posted the best results and came close to achieve a full recovery.

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<sup>3</sup> Airports with more than 25 million passengers per annum pre-pandemic (2019).

**Regional and smaller airports** also came very close to a full passenger traffic recovery in **July** compared to pre-pandemic (July 2019) levels, with airports with less than 10 million passengers per annum<sup>4</sup> at -3%.

An increasing number of regional airports serving popular tourism destinations and/or relying on Low Cost Carriers saw passenger volumes well ahead of pre-pandemic (July 2019) levels - including: Zadar (+60.5%), Tirana (+57.6%), Santorini (+37.5%), Figari (+33.3%), Funchal (+28.6%), Beauvais (+23.3%), Turin (+23.7%), Chania (+21.8%), Kerkyra (+21.2%), Santiago de Compostela (+21%), Olbia (+11.4%), Memmingerberg (+12.1%), Menorca (+11.1%), Naples (+9.2%) and Charleroi (+7%).

## **FREIGHT & AIRCRAFT MOVEMENTS**

**Freight traffic** across the European airport network decreased by **-3.1%** in **July** compared to the same period last year – with EU+ airports losing -2.4% and airports in the rest of Europe -7.6%. This reflects the continued impact of the war in Ukraine and in particular disruptions to global supply chains.

**Aircraft movements** increased by **+33.7%** in July compared to the same period last year.

## **DATA BY GROUP**

During the month of **July**, 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 passengers per year (Group 4) reported an average adjustment of **-17.6%**, **-13.8%**, **-3.3%** and **-2.2%**, as compared to pre-pandemic traffic levels (2019). The airports that reported the highest increases in passenger traffic for July 2022 (when compared with July 2021) are as follows:

**GROUP 1:** Istanbul IST (**+5%**), Paris ORY (**-1%**), Palma de Mallorca (**-2%**), Athens & Lisbon (**-5%**) and Antalya (**-8%**)

**GROUP 2:** Naples (**+9%**), Catania (**+2%**), Porto (**+1%**), Gran Canaria (0%) and Tenerife South (-1%)

**GROUP 3:** Sochi (**+118%**), Rhodes (**+11%**), Charleroi & Lanzarote (**+7%**), Heraklion & Milan LIN (**+6%**) and Fuerteventura & Bologna (**+4%**)

**GROUP 4:** Tirana (**+58%**), Santorini (**+37%**), Iasi (**+34%**), Prishtina (**+30%**) and Madeira (**+29%**)

**## ENDS ##**

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<sup>4</sup> Based on 2019 traffic.

## Notes to editors

The ACI EUROPE Airport Traffic Report is a dedicated service for ACI EUROPE members. Accredited journalists can access the Report in full in the password protected 'Airport Traffic Report' section of the 'Media room' on our website [www.aci-europe.org](http://www.aci-europe.org). For your password to access these sections, please contact us by e-mail at: [laura.bura@aci-europe.org](mailto:laura.bura@aci-europe.org). Your request will be validated and the password will be e-mailed to your work address.

The ACI EUROPE Airport Traffic Report includes **450 airports in total representing more than 95% of European air passenger traffic**. The report is unique in that it is the only one to include all types of airline passenger flights to, from and within Europe: full service, low cost, charter and others.

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