

# August passenger traffic just -12% below pre-pandemic volumes in Europe

## ACI EUROPE

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*Jankovec describes a market "polarised by externalities" as  
holiday traffic bounces back whilst war takes its toll*

**Brussels, 12 October 2022:** European airport trade body ACI EUROPE today released its air traffic report for August 2022.

**Passenger traffic across the European airport network** increased by **+51%** in August compared to the same month last year, with the surge mostly driven by **international passenger traffic (+70%)** as restrictions to cross-border travel both within Europe and to most external markets had lifted. **Domestic passenger traffic (+8%)** grew at a much slower pace.

When compared to pre-pandemic (August 2019) levels, passenger traffic in August stood at -12%, a further improvement on the previous months (July at -14.4% and June at -17.3%) and the best monthly performance since the start of the pandemic.

## **EU+ MARKET IN THE LEAD & WAR IMPACT VISIBLE**

The **EU+ market<sup>1</sup>** kept driving the recovery, with passenger traffic at airports in the bloc increasing by **+64%** in August compared to the same month last year. The best performances came from airports in the UK (+178%), Finland (+175%) and Ireland (+147%), reflecting the fact that Governments in these countries had been slower to ease travel restrictions last year.

When compared to pre-pandemic (August 2019) levels, airports in Greece (+4.5%), Luxembourg (+6.4%) and Iceland (+0.2%) achieved a full passenger traffic recovery in August. Meanwhile, airports in other large tourism markets including Portugal (-5.8%), Spain (-7.4%), Italy (-8.5%) and Croatia (-8.6%), along with those in Romania (-6.8%) and Lithuania (-7.8%) came closest to a full recovery. Conversely, airports in Slovenia (-40.1%), Finland (-37.7%), Latvia (-31.1%), the Czech Republic (-30.5%) and Bulgaria (-29.3%) significantly outperformed, in large part a reflection of the impact of the war in Ukraine and related sanctions against Russia and Belarus. Amongst larger markets, the performance of airports in France (-13.5%) and Germany (-14.2%) was similar, with those in the UK (-19%) still lagging behind.

Overall, the EU+ market stood at **-14%** in August compared to pre-pandemic (August 2019) volumes.

At airports in the **rest of Europe**<sup>2</sup>, passenger traffic only increased by **+7%** when compared to the same month last year. This mostly reflected the effects of the war – with the loss of all commercial air traffic for Ukrainian airports, declining passenger volumes airports in Belarus (-16.6%) and Russia (-17.2%) as well as flat results for those in Moldova (-0.3%).

When compared to pre-pandemic (August 2019) levels, passenger traffic in the rest of Europe stood at **-16%**. Airports in Albania (+60.3%), Bosnia-Herzegovina (+31.2%), Kosovo (+22.7%) and Armenia (+21.4%) far exceeded their pre-pandemic volumes, while those in the major market of Turkey (-4.5%) came close to a full recovery. At the other end of the spectrum, airports in Belarus (-60.6%) and Moldova (-20.4%) registered steep declines, with those in Russia (+5.7%) still managing to remain above their pre-pandemic volumes as passenger traffic shifted to domestic and non-EU+ routes.

## **RECOVERY PATTERNS SHAPING AIRPORT PERFORMANCE**

Passenger traffic at **the Majors** (top 5 European airports) grew by **+68.1%** in August compared to the same month last year, but remained -17.5% below pre-pandemic (August 2019) levels – mainly due to continued travel restrictions in parts of Asia.

- **Istanbul** was once again the busiest European airport – welcoming 6.8 million passengers during the month. The airport was the only major European hub whose passenger volumes exceeded pre-pandemic (August 2019) levels (+1%). Its passenger traffic increased by nearly +50% when compared to August 2021.
- **London-Heathrow** came second with 6.04 million passengers, closely followed by **Paris-CDG** with 6.02 million passengers. Volumes increased by +170.5% and +69.5% respectively for the British and French hubs compared to the same month last year – and remained for both at about -20% below pre-pandemic (August 2019) levels.
- Capacity restrictions limited passenger traffic to 5.33 million at **Amsterdam-Schiphol** (+40.7% compared to the same month last year / -21.8% compared to August 2019) and to 5.19 million at **Frankfurt** (+54.1% compared to the same month last year / -25% compared to August 2019).

The performance of selected **other large airports** in August reflected a Summer recovery still mainly driven by intra-European and transatlantic routes, and dominated by leisure demand:

- **Antalya** handled just 6,000 passengers less than major hub Frankfurt and was the 6th busiest European in August (-7.5% compared to August 2019).
- **Paris-Orly** exceeded its pre-pandemic (August 2019) passenger volumes by +7.2%.

- **Palma de Mallorca** (-2.8%), **Lisbon** (-5.8%), **Athens** (-6.1%), **London-Stansted** (-9.3%) and **Dublin** (-10.2%) came closest to a full recovery of their pre-pandemic (August 2019) passenger volumes.

Meanwhile, the fact that **regional and smaller airports**<sup>3</sup> also came close to a full passenger traffic recovery (-4.7% for airports with less than 10 million passengers per annum when compared to August 2019) also reflected the same dynamics – along with the significant capacity expansion from Ultra-Low Cost Carriers.

There were however significant variations in performance amongst regional airports, with those serving popular tourist destinations and/or relying on Low Cost Carriers seeing passenger volumes exceeding pre-pandemic (August 2019) levels - including: **Oradea** (+124.9%), **Turin** (+64.6%), **Zadar** (+55.4%), **Santorini** (+41.1%), **Kutaisi** (+26.6%), **Trieste** (+23.8%), **Kerkyra** (+20.6%), **Harstad** (+15.9%), **Chania** (+18%), **Rotterdam** (+12%), **Naples** (+12.7%), **Santander** (+12.1%), **Billund** (+9.7%), **Olbia** (+9%) and **Charleroi** (+9%).

Said **Olivier Jankovec, Director General of ACI EUROPE**, "August's snapshot shows us how polarised the situation is becoming for Europe's airports as they are dominated by externalities. On the one hand, the public appetite to travel is undimmed – as the holiday surge shows. On the other hand we have the reality of war. The simple fact of geography is going to have a heavy hand in our members' fortunes for some time to come it seems".

## **FREIGHT & AIRCRAFT MOVEMENTS**

**Freight traffic** across the European airport network decreased by **-5%** in **August** compared to the same month last year, with EU+ airports seeing freight traffic at **-6%** and those in the rest of Europe at **-4%**. Overall freight traffic remained **-14%** below (2019) pre-pandemic levels.

**Aircraft movements** increased by **+27%** across the European airport network compared to the same month last year, with airports in the EU+ markets at **+34%** and those in the rest of Europe at **-2%**.

## **DATA BY AIRPORT GROUPS**

During the month of **August**, 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 **-16.6%**, **-15.8%**, **-5.5%** and **-3.3%**, 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:** Paris ORY (+7%), Istanbul IST (+1%), Palma de Mallorca (-3%), Athens & Lisbon (-6%) and Antalya (-8%).

**GROUP 2:** Naples (+13%), Catania (+2%), Gran Canaria (+1%), Tenerife South (-1%) and Marseille (-2%).

**GROUP 3:** Sochi (+122%), Charleroi (+9%), Rhodes (+6%), Bologna, Fuerteventura and Lanzarote (+5%), and Palermo (+3%).

**GROUP 4:** Torino (+65%), Tirana (+60%), Santorini (+41%), Santiago-Rosalía de Castro (+27%) and Prishtina (+23%).

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

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

<sup>3</sup> Airports with less than 10 million passenger per annum (2019).

**## ENDS ##**

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