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Peak summer months passenger volumes recover to 88% of pre-pandemic levels

Brussels, 27 October 2022: European airport trade body ACI EUROPE today released its airport traffic report for the third quarter (Q3) and September 2022.

Passenger traffic across the European airport network increased by **+61%** in **Q3** compared to the same period last year. **International passenger traffic (+84%)** drove the surge as largely unrestricted cross border travel led to a boom in leisure and VFR travel over the peak summer months. **Domestic passenger traffic (+14%)** expanded at lower but still dynamic pace.

When compared to pre-pandemic (2019) levels, passenger traffic in Q3 stood at **-12%**, a significant improvement over Q2 (-17%) and Q1 (-39%).

EU+ MARKET SURGING IN Q3 – WITH NATIONAL VARIATIONS

The **EU+ market**[1] continued to drive the recovery, with passenger traffic at airports in the bloc increasing by **+74%** in **Q3** compared to the same period last year. The best performances came from airports in the UK (+202%), Finland (+194%) and Ireland (+188%) - largely reflecting the fact that Governments in these countries had been slower to ease travel restrictions last year.

When compared to pre-pandemic (2019) levels, airports in the EU+ market were at **-13%**, with significant variations in recovery performance:

- Airports in Greece (+4.8%), Luxembourg (+3.3%) and Iceland (+1%) exceeded their pre-pandemic passenger volumes.
- Airports in prominent tourism markets including Portugal (-1.8%), Spain (-7.8%), Croatia (-9.3%) and Italy (-11.4%) generally outperformed the EU+ average, along with those in Romania (-4.8%), Lithuania (-7.6%), Ireland (-10%) and Poland (-11.2%), where significant Ultra-Low Cost Carrier capacity expansion was often a major contributor.
- Airports in the largest EU+ aviation markets recovered at a slower pace - with France (-14.1%) posting the best results followed by the UK (-18.1%) and Germany (-25.9%). The exposure of these markets to intercontinental traffic (especially to Asia) as well as airport capacity restrictions at selected hubs in the UK and Germany acted as recovery-limiting factors.

- Meanwhile, airports in Finland (-35.4%), Czech Republic (-30.9%), Latvia (-28.7%) and Bulgaria (-27.7%) significantly lagged behind, in large part due to the impact of the war in Ukraine and related sanctions against Russia and Belarus.

At airports in the **rest of Europe**[2], passenger traffic increased by **+18%** in **Q3** when compared to the same period last year. The best performance came from airports in Israel (+164.4%), while the loss of all commercial air traffic for Ukrainian airports and declining passenger volumes in Belarus (-15.9%) and Russia (-3.9%) dragged down the average for the non-EU+ bloc.

When compared to pre-pandemic (Q3 2019) levels, passenger traffic in the rest of Europe stood at **-9%**. Airports in Albania (+60%), Kosovo (+26.3%), Bosnia-Herzegovina (+23%), Northern Macedonia (+3.3%) and Montenegro (+0.4%) exceeded their pre-pandemic volumes, while those in the major market of Turkey (-6.6%) as well as in Serbia (-4.4%) and Georgia (-2.9%) came close to a full recovery. Airports in Belarus (-60.1%) registered steep declines, with those in Russia (+3.4%) 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 **+79.4%** in **Q3** compared to the same period last year - but remained **-16.9%** below pre-pandemic (Q3 2019) levels, mainly due to continued travel restrictions in parts of Asia.

- **Istanbul** was the busiest European airport and the only major European hub whose passenger volumes exceeded pre-pandemic (Q3 2019) levels at +3%. Its passenger traffic increased by nearly +56.1% when compared to Q3 2021.
- **London-Heathrow** came second followed by **Paris-CDG**. Volumes increased by +187.1% and +83% respectively for the British and French hubs compared to Q3 last year – standing at -18.4% and -19.9% respectively below pre-pandemic (Q3 2019) levels.
- Capacity restrictions limited passenger traffic growth at **Amsterdam-Schiphol** (+54.1%) and **Frankfurt** (+62.3%) compared to Q3 last year. The Dutch and German hubs came in 4th and 5th position – with volumes for both remaining below -20% when compared to pre-pandemic (Q3 2019) levels.

The performance of selected **other large airports** in Q3 reflected a summer recovery still mainly driven by intra-European and transatlantic routes, and dominated by leisure demand:

- **Paris-Orly** (+3.7%) exceeded its pre-pandemic (Q3 2019) passenger volumes.

- **Palma de Mallorca** (-2.4%) and **Athens** (-5%), came closest to a full recovery of their pre-pandemic (Q3 2019) passenger volumes – along with **Lisbon** (-5.2%), **Antalya** (-8.2%) and **London-Stansted** (-9.6%).

- **Madrid** only handled 2% less passengers than Frankfurt and was the 6th busiest European airport in Q3 (-14.5% compared to Q3 2019).

While **Regional and smaller airports**[3] (**+50.3%**) grew at a lower pace than the Majors in Q3 when compared to the same period last year, they had almost recovered their pre-pandemic (Q3 2019) volumes: **-3.7%**.

This again reflected leisure and intra-European driven recovery dynamics along with Ultra-Low Cost Carriers' surge in capacity.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 (Q3 2019) levels - including: **Perugia (**+125.4%), **Zadar** (+58%), **Santorini** (+37%), **Funchal** (+30.4%), **Turin** (+26.3%), **Kerkyra** (+19.9%), **Figari** (+19.8%), **Chania** (+18.9%), **Olbia** (+11.3%) **Naples** (+10.3%), **Menorca** (+9.3%), **Charleroi** (+9.3%), **Paphos** (+8.2%), **Palermo** (+4.3%) and **Bologna** (+3.3%).

TRAFFIC MOMENTUM HOLDING UP IN SEPTEMBER

In **September passenger traffic** across the **European airport network** stood at **-12%** when compared to pre-pandemic (September 2019) levels.

Airports in the **EU+ markets** kept improving and posted their best monthly recovery performance at **-12%** (vs. -14% in August). Airports in the **rest of Europe** also made further gains at **-15%** (vs. -16% in August).

FREIGHT & AIRCRAFT MOVEMENTS

Freight traffic across the European airport network decreased by **-1%** in **Q3** compared to the same period last year, with EU+ airports seeing freight traffic at **-1%** and those in the rest of Europe at **-4%**. Overall freight traffic increased by **+6%** compared to (Q3 2019) pre-pandemic levels.

Aircraft movements increased by **+31%** in **Q3** across the European airport network compared to the same period last year, with airports in the EU+ market at **+37%** and those in the rest of Europe at **+9%.**

DATA BY AIRPORT GROUPS

During Q3, 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 **-14%**, **-14.9%**, **-4.5%** and **-3%**, as compared to pre-pandemic traffic levels (Q3 2019). The airports that reported the highest increases in passenger traffic for Q3 2022 (when compared with Q3 2019) are as follows:

GROUP 1: Paris ORY (**+4%**), Istanbul IST (**+3%**), Palma de Mallorca (**-2%**), Athens & Lisbon (-**5%**) and Antalya (**-8%**).

GROUP 2: Naples (**+10%**), Catania (**+3%**), , Porto (**+2%**), Gran Canaria & Tenerife South (**-1%**) and Saint Petersburg (**-2%**).

GROUP 3: Sochi (**+123%**), Charleroi (**+9%**), Rhodes (**+7%**), Fuerteventura & Lanzarote (**+5%**) and Palermo (**+3%**).

GROUP 4: Tirana (+**60%**), Santorini & Memmingen (**+37%**), Funchal (**+30%**), Iasi (**+28%**) and Torino & Prishtina (**+26%**).

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[1] EU, EEA, Switzerland and UK.
[2] Albania, Armenia, Belarus, Bosnia & Herzegovina, Georgia, Israel, Kazakhstan, Kosovo, Northern Macedonia, Moldova, Montenegro, Russia, Serbia, Turkey, Ukraine and Uzbekistan.
[3] Airports with less than 10 million passengers per annum (2019).

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