Passenger traffic recovery pauses in October as air transport market continues to reshape

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Brussels, 8 December 2022: European airport trade body ACI EUROPE today released its air traffic report for October 2022.

Passenger traffic across the European airport network grew by **+40%** in October compared to the same month last year. The increase is still largely driven by **international passenger traffic (+51%)** with **domestic passenger traffic (+12%)** expanding at a much slower pace.

When compared to pre-pandemic (October 2019) levels, passenger traffic in October stood at **-12%**. This marks the first time since last Spring that the recovery in monthly passenger traffic has stalled (September at -12%).

Olivier Jankovec, Director General of ACI EUROPE commented: *"October saw the recovery in passenger traffic take a pause – with only 36% of European airports having so far fully recovered their pre-pandemic volumes. As most of these are regional and smaller airports, October also revealed a multi-speed and increasingly contrasted European airport market.*

There is no doubt an array of factors are combining to reshape the market. These range from the war in Ukraine, deteriorating macro-economics and continued travel restrictions to parts of Asia, through to Low Cost Carriers selectively expanding capacity within Europe, fast rising air fares and changed demand patterns including the rise of 'bleisure' extending tourism seasons.

We have now entered the Winter season, and the big question mark is how these factors will interact and impact demand in the coming months."

EU+ MARKET LEADING & WAR IMPACT

The **EU+ market**[1] saw passenger traffic at airports increasing by **+50%** in October compared to the same month last year. The best performances kept coming from airports in the UK (+98.3%), Finland (+89.8%) and Ireland (+86.8%), where the recovery of air traffic in these countries started later than in the rest of the EU+ bloc.

When compared to pre-pandemic (October 2019) levels:

- Airports in Iceland (+8%), Greece (+7.5%), Portugal (+3.8%) and Bulgaria (0%) achieved or exceeded a full recovery.

- A longer tourism season and Ultra-Low Cost Carriers (LCCs) stimulated selected markets, resulting in airports in Luxembourg (-1.4%), Spain (-2.9%), Ireland (-5.9%), Italy (-6.3%), Romania (-5.1%) and Croatia (-9.5%) coming close to a full recovery.

- Conversely, airports in Slovakia (-30.9%), the Czech Republic (-35.4%), Finland (-35.1%) and Sweden (-27%) significantly underperformed – mainly due to the impact of the war in Ukraine and/or weaker home based air carriers.

- Amongst larger markets, airports in France (-11.2%) recovered faster followed by those in the UK (-14.4%), while airports in Germany (-26.2%) significantly lagged behind as LCCs retreated.

Overall, the EU+ market stood at **-12%** in October compared to pre-pandemic (October 2019) volumes.

At airports in the **rest of Europe**[2], passenger traffic only increased by **+6%** in October 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 and declining passenger volumes in Russia (-19.7%).

When compared to pre-pandemic (October 2019) levels, passenger traffic in the rest of Europe stood at **-14%**. Airports in Albania (+72.4%), Armenia (+30.9%), Kosovo (+30.1%), Uzbekistan (+21.2%), Kazakhstan (+20.1%) and Bosnia-Herzegovina (+15.6%) far exceeded their pre-pandemic volumes, while those in the major market of Turkey (-6.7%) as well as Georgia (-1%) came close to a full recovery. Airports in Russia (+1.3%) still remained above their pre-pandemic volumes as passenger traffic shifted to domestic and non-EU+ routes.

CONTRASTED RECOVERY DYNAMICS BETWEEN MAJORS & REGIONAL AIRPORTS

Passenger traffic at **the Majors** (top 5 European airports) grew by **+52.5%** in October compared to the same month last year.

However, the Majors did not progress further towards a full recovery: October passenger traffic volumes remained at -17.1% below pre-pandemic (October 2019) levels (compared to -16.4% in September).

- **Istanbul** remained the busiest European airport, welcoming nearly 6 million passengers during the month – bringing it almost to pre-pandemic (October 2019) levels (-3.8%). Volumes increased by +36.7% compared to October 2021.

- **London-Heathrow** came second followed by **Paris-CDG**. Volumes stood respectively at -15.7% and -18.5% below pre-pandemic (October 2019) levels at the British and French hubs

– and increased by +93.6% and +67.6% compared to October 2021.

- **Frankfurt** (-23.3% compared to pre-pandemic - October 2019 - levels /+45.3% compared to October 2021) came fourth, followed by **Amsterdam-Schiphol** (-23.6% compared to pre-pandemic - October 2019 - levels / +31.1% compared to October 2021).

The performance of selected **other large airports** in October reflected a recovery still mainly driven by intra-European and transatlantic traffic, dominated by leisure demand and fuelled by significant capacity expansion from Ultra-Low Cost Carriers:

- **Palma de Mallorca** (+4.8%) and **Paris-Orly** (+6.7%) were the only ones exceeding their pre-pandemic (October 2019) passenger volumes.

- **Athens** (-0.5%), **Lisbon** (-1%), **Antalya** (-4.7%), **London-Stansted** (-5.5%) and **Dublin** (-5.9%) and **Manchester** (-7.3%) came closest to a full recovery of their pre-pandemic (October 2019) passenger volumes.

Meanwhile, the performance of **regional and smaller airports**[3] kept improving markedly – with these airports almost achieving a full passenger traffic recovery (-0.6% for airports with less than 10 million passengers per annum when compared to October 2019).

Many regional and smaller airports serving popular tourism destinations and/or relying on Low Cost Carriers posted impressive performances, with passenger volumes far exceeding their pre-pandemic (October 2019) levels - including: **Trapani** (+180.1%), **Perugia** (+113.7%), **Zaragoza** (+58.3%), **Bourgas** (+44.9%), **Menorca** (+40.1%), **Funchal** (+37.3%), **Beauvais** (+33.5%), **Alghero** (+31.1%), **Zadar** (+30.3%), **Kos** (+25.2%), **Kerkyra** (+20.2%)**,** **Turin** (+18.9%), **Dalaman/Muğla** (+17.3%) and **Charleroi** (+10.6%).

FREIGHT & AIRCRAFT MOVEMENTS

Freight traffic across the European airport network decreased by **-7%** in **October** compared to the same month last year, with EU+ airports seeing freight traffic at **-6%** and those in the rest of Europe at **-12%**. Overall freight traffic climbed **+1%** above (2019) pre-pandemic levels.

Aircraft movements increased by **+24%** across the European airport network compared to the same month last year, with airports in the EU+ markets at **+30%** and those in the rest of Europe at **-1%.**

DATA BY AIRPORT GROUPS

During the month of **October**, 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 **-15.6%**, **-13.6%**, **-2.0%** and **+0.4%**, as compared to pre-pandemic traffic levels (October 2019).

The airports that reported the highest increases in passenger traffic for October 2022 compared with October 2019 are as follows:

GROUP 1: Paris-Orly (**+6.7%**), Palma de Mallorca (**+4.8%**), Athens (**-0.5%**), Lisbon (**-1%**) and Istanbul (**-3.8%**).

GROUP 2: Catania (**+8.3%**), Porto (**+6.9%**), Naples (**+5.7%**), Tenerife South (**+4.7%**) and Gran Canaria (**+4.4%**).

GROUP 3: Sochi (**+125.6%**), Almaty (**+20.1%**), Rhodes (**+16.3%**), Heraklion (**+13.6%**), and Palermo (**+12.5%**).

GROUP 4: Tirana (**+72.4%),** Bourgas (+**44.9%**), Menorca (**+40.1%**), Funchal (**+37.3%**) and Trabzon (**+36.2%**).

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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 passenger per annum (2019).

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