AIRPORTS COUNCIL INTERNATIONAL

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Passenger traffic recovery stable in February at -12% against pre-pandemic levels

Brussels, 4 April 2023: European airport trade body ACI EUROPE today released its air traffic report for February 2023.

Passenger traffic across the European airport network increased by **+48%** in February compared to the same month last year – when travel remained constrained by Omicron-related restrictions. The growth is predominantly driven by **international passenger traffic (+58%)** with **domestic passenger traffic (+22%)** expanding at a much slower pace.

When **compared to pre-pandemic (February 2019**) levels passenger traffic in February 2023 stood at **-12%** - almost unchanged over the preceding month (-11% in January 2023). 40% of Europe's airports had recovered or exceeded their pre-pandemic volumes.

SIGNIFICANT PERFORMANCE VARIATIONS ACROSS NATIONAL MARKETS

With an increase of **+53%**, **EU+ airports**[1] grew passenger traffic at the fastest pace in February compared to the same month last year. This reflects the fact that Omicron-related restrictions remained the tightest across this bloc. The highest increases came from airports in Cyprus, Malta (both at +92%) and Austria (+81%).

When **compared to pre-pandemic (February 2019) levels,** EU+ passenger traffic stood at **-12%** - but with significant divergences in performance:

- 10 national markets achieved or exceeded a full recovery in February. The best performances came from airports in Portugal (+18.9%), Luxembourg (+10.9%), Cyprus (+9.7%), Malta (+5.3%) and Bulgaria (+4.9%).

- Conversely, airports in Slovakia (-46.7%), Slovenia (-38.5%) and Germany (-33%), the Czech Republic (-29.9%) and Sweden (-28.3%) remained the farthest from achieving a full recovery. This reflected a mix of factors including the impact of the war in Ukraine, the lack of penetration or loss of Low Cost Carrier traffic and industrial action.

- Among the largest EU+ markets - and aside from the underperformance of airports in Germany - airports in Spain +2.2%) posted the best results followed by those in France (-7.3%), Italy (-10.6%) and the UK (-12.9%).

At airports in the **rest of Europe**[2], passenger traffic grew by **+23%** in February compared to the same month last year.

The impact of the war weighed on performance – with the loss of all commercial air traffic for Ukrainian airports and passenger volumes increasing by just +1.5% at Russian airports. Meanwhile, other national markets posted impressive results, including airports in Israel (+111.2%), Armenia (+91.5%), Moldova (+89.7%) and Serbia (+88.2%).

When **compared to pre-pandemic (February 2019) levels**, passenger traffic in the rest of Europe became aligned with the EU+ market at **-11%**.

Airports in Uzbekistan (+116.6%), Albania (+93.7%), Kosovo (+39.6%) and Serbia (+24.4%) far exceeded their pre-pandemic volumes. Those in the major market of Turkey (-6.8%) saw their performance affected by the devastating earthquakes that hit the country. Meanwhile, airports in Russia (+4.1%) remained above their pre-pandemic volumes as passenger traffic kept shifting to domestic and non-EU+ markets.

RECOVERY PATTERNS SHAPING AIRPORT PERFORMANCE

Passenger traffic at **the Majors** (top 5 European airports in 2019[3]) grew by **+55%** in February compared to the same month last year. Volumes remained **-11.7% below pre-pandemic (February 2019) levels.** The positive impact of the re-opening of the Chinese market was limited during the month – and still needs to materialise.

Amongst the current top 5 European airports[4], Istanbul and Madrid remained the only ones having fully recovered their pre-pandemic (February 2019) levels:

- **London-Heathrow went back to being the busiest European airport in February.** Passenger traffic increased by +81.6% over the same month last year, allowing the British hub to reduce the gap with its pre-pandemic volumes (-5.1%).

- **Istanbul** came second, with passenger volumes growing by +41.6% over the same month last year and standing +4% above their pre-pandemic level. The Turkish hub was followed by **Paris-CDG** at +52.8% over February 2022 and -11.9% below its pre-pandemic volumes.

- **Madrid** kept the fourth position with its passenger traffic at +45.1% over February 2022 and +0.6% above pre-pandemic levels. **Amsterdam-Schiphol** closed the league at +42.1% over February 2022 and -21.9% below its pre-pandemic volumes.

The passenger traffic performance of **other large[5] and capital airports** in February reflected a recovery still largely driven by intra-European and transatlantic routes, fuelled by leisure demand and characterised by significant (but selective) capacity expansion from Ultra-Low Cost Carriers.

- Accordingly, **Lisbon** (+18.8%), **Tel Aviv** (+13.6%) **Dublin** (+2.4%), **Athens** (+2.2%) and **Palma de Mallorca** (+1.1%) all exceeded their pre-pandemic (February 2019) volumes.

- Meanwhile, **Berlin** (-44.1%), **Munich** (-29.3%), **Helsinki** (-28.1%), **Prague** (-28.7%), **Frankfurt** (-25%) and **London-Gatwick** (-22.3%) and **Stockholm** (-21.5%) remained well below.

These same recovery patterns and market dynamics were to the continued benefit of a number of large **Ultra-Low Cost airport bases**, bringing their February 2023 passenger traffic well above their pre-pandemic (February 2019) levels: **Beauvais** (+33.3%), **Charleroi** (+17.9%) and **Bergamo** (+17.6%).

They also benefitted **regional and smaller airports**[6] serving popular tourist destinations and/or relying on Low Cost Carriers such as: **Kutaisi** (+59.2%), **Varna** (+58%), **Funchal** (+48.5%), Asturias (+42%), **Memmingen** (+36.4%), **Rotterdam** (+27.5%), **Lodz** (+34.2%), **Paphos** (+24.6%).

FREIGHT & AIRCRAFT MOVEMENTS

Freight traffic across the European airport network decreased by **-6%** in **February** compared to the same month last year – but stood at **+5%** compared to their pre-pandemic (February 2019) level.

Frankfurt (-8% compared to February 2019) was the busiest European airport for freight traffic, followed by **Leipzig** (+20%), **Amsterdam-Schiphol** (-6%), **London-Heathrow** (-20%) and **Istanbul** (-1%).

Aircraft movements increased by **+26%** across the European airport network compared to the same month last year, with airports in the EU+ markets at **+29%** and those in the rest of Europe at **+10%.**

DATA BY AIRPORT GROUPS

During the month of **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 passengers per year (Group 4) reported an average adjustment of **-12.7%**, **-8.8%**, **-8.7%** and **-6.7%**, as compared to pre-pandemic traffic levels (February 2019).

The airports that reported the highest increases in passenger traffic for February 2023 when compared with February 2022 are as follows:

GROUP 1: Lisbon (**+18.8%**), Istanbul IST (**+4%**), Dublin (**+2.4%**), Athens (**+2.2%**) and Palma de Mallorca (**+1.1%**).

GROUP 2: Milan BGY (**+17.6%**), Porto (**15.4%**), Tel Aviv (**+13.6%**), Catania (**+11.2%**) and Tenerife Sur (**+10.4%**).

GROUP 3: Sochi (**+68.3%**), Belgrade (**+25.5%**), Charleroi (**+17.9%**), Lanzarote (**+12.7%**) and Fuerteventura (**+10.5%**).

GROUP 4: Biarritz (**712.2%**), Tirana (**+93.7%**), Varna (**+58%**), Funchal (**+48.5%**) and Asturias (**+42%**).

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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] London-Heathrow, Istanbul, Paris-CDG, Amsterdam-Schiphol and Frankfurt.
[4] London-Heathrow, Istanbul, Paris-CDG, Madrid and Amsterdam-Schiphol.
[5] Airports with more than 25 million passengers per annum (2019).
[6] Airports with less than 10 million passengers per annum (2019).

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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.