AIRPORTS COUNCIL INTERNATIONAL

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Almost half of Europe's airports back to pre-pandemic passenger levels

Data shows 45% reaching recovery milestones by March, though major hubs still hit by external factors

Brussels, 5 May 2023: European airport trade body ACI EUROPE today released its air traffic report for March 2023 and full quarter 1 2023 (Q1).

Passenger traffic kept recovering in the **first quarter** across the European airport network, as volumes increased by **+49%** compared to the same period last year. The growth somewhat slowed down in **March** at **+34%**, reflecting the fact that travel restrictions were being lifted at that time last year, and passenger traffic had started recovering as a result.

Passenger traffic in the **first quarter** was just **-10.6%** below **pre-pandemic (Q1 2019**) levels. International passenger traffic keeps driving the recovery and getting closer to pre-pandemic levels (-9%), while domestic passenger traffic is lagging behind (-18.5%). This is pointing to structural market changes resulting from factors including changing consumer behaviours and modal shifts.

By the end of March, **45%** of Europe's airports had recovered or exceeded their pre-pandemic volumes – up from 40% in February.

PERFORMANCE VARIATIONS REFLECTING RECOVERY PATTERNS & THE WAR IN UKRAINE

EU+ airports[1] saw passenger volumes increasing by **+53.4%** in the **first quarter** compared to the same period last year.

When **compared to pre-pandemic (Q1 2019) levels,** EU+ passenger traffic stood at **-11.5%** - but with significant divergences in performance. This reflects a recovery still predominantly driven by leisure and blended demand as well as selective capacity expansion from Ultra-Low-Cost Carriers, along with the impact of the war in Ukraine:

- Airports in Portugal (+15.2%), Croatia (+12.1%), Luxembourg (+9.1%) and Cyprus (+8.4%) well exceeded their pre-pandemic volumes.

- Conversely, airports in Slovakia (-44.9%), Slovenia (-41.2%), Germany (-32.2%), the Czech Republic (-29.7%) and Finland (-26.2%) remained the farthest from a full recovery.

- Amongst the largest EU+ markets – and aside from the underperformance of German airports (also resulting from industrial action) - airports in Spain (+1.7%) posted the best results followed by those in Italy (-6.8%), France (-11.4%) and the UK (-12.9%).

At airports in the **rest of Europe**[2], passenger traffic grew by **+30.2%** in the first quarter compared to the same period last year.

When **compared to pre-pandemic (Q1 2019) levels**, passenger traffic in the rest of Europe outperformed the EU+ market at just **-6%**.

While airports in Ukraine (-100%) have lost all of their passenger traffic for more than a year, those in Russia (+4.5%) managed to remain above their pre-pandemic volumes in the first quarter as passenger demand has shifted to domestic and non-EU+ markets. This boosted the performance of airports in Uzbekistan (+112.5%), Kazakhstan (+55.1), Armenia (+37.6%) and Serbia (+26.3%).

Meanwhile airports in the major market of Turkey (-4.9%) came close to a full recovery and those in Albania (+91%) achieved impressive growth thanks to the capacity deployed by Ultra-Low-Cost Carriers.

MAJORS & LARGE AIRPORTS SHOW SLOWER RECOVERY

Passenger traffic at **the Majors** (top 5 European airports in 2019[3]) grew by **+52.4%** in the **first quarter** compared to the same period last year. Volumes remained **-11.2% below pre-pandemic (Q1 2019) levels** due to lower hub carrier capacity deployment and the impact of the re-opening of China still limited.

Amongst the current top 5 European airports[4] **Istanbul** (+5.9%) and **Madrid** (0%) were the only ones having recovered their pre-pandemic (Q1 2019) levels.

London-Heathrow (-5.7%) re-established itself as the busiest European airport, followed by Istanbul, **Paris-CDG** (-13.2%), Madrid and **Amsterdam-Schiphol** (-20.8%).

The German hubs - **Frankfurt** (-23.3%) and **Munich** (-30.1%) significantly under-performed their peers, with lower Low-Cost Carrier penetration and strikes being contributing factors.

Meanwhile, the resilience of leisure demand to inflationary pressures and higher air fares and the reliance on Low-Cost Airline traffic resulted in a number of **other large**[5] **and capital airports** exceeding their pre-pandemic volumes in the first quarter: **Lisbon** (+13.9%), **Tel Aviv** (+14%), **Palma de Mallorca** (+2.4%), **Athens** (+2.3%) and **Dublin** (+1.9%).

LOW-COST BASES & SELECTED REGIONALS OUTPERFORMING

These same recovery patterns and market dynamics were to the continued benefit of a number of large **Ultra-Low-Cost airport bases**: **Beauvais** (+34.3%), **Bergamo** (+19.7%) and **Charleroi** (+16%).

They also benefitted **regional and smaller airports**[6] where passenger traffic in the **first quarter** was just **–4.5%** below their pre-pandemic (Q1 2019) volumes. Those serving popular tourist destination and/or relying on Low-Cost Carriers posted impressive performances, including: **Kutaisi** (+61.4%), **Varna** (+59.1%), **Madeira** (+43.5%), **Asturias** (+36.4%), **Memmingen** (+40.3%), **Trapani** (+31.9%) **Rotterdam** (+26.8%), **Lodz** (+36.7%), **Paphos** (+29.1%) and **Chania** (+20.6%)

FREIGHT & AIRCRAFT MOVEMENTS

Freight traffic across the European airport network decreased by **-8.7%** in **the first quarter** compared to the same period last year – and stood at **-7.9%** compared to its pre-pandemic (Q1 2019) level.

Frankfurt (-13% compared to Q1 2019) was the busiest European airport for freight traffic, followed by **Leipzig** (+16%), **Amsterdam-Schiphol** (-13%), **London-Heathrow** (-22%) and **Istanbul** (-28%).

Aircraft movements increased by **+24%** in the first quarter across the European airport network compared to the same period last year, with airports in the EU+ markets at **+25.1%** and those in the rest of Europe at **+18.2%.**

DATA BY AIRPORT GROUPS

During the **first quarter**, 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 **-12.2%**, **-11%**, **-4.3%** and **-6.2%**, as compared to pre-pandemic traffic levels (Q1 2019).

The airports that reported the highest increases in passenger traffic for Q1 2023 when compared with Q1 2019 are as follows:

GROUP 1: Lisbon (**+13.9%**), Istanbul IST (**+5.9%**), Palma de Mallorca (**+2.4%**), Athens (**+2.3%**) and Dublin (**+1.9%**).

GROUP 2: Milan BGY (**+19.7%**), Tel Aviv (**+14%**), Catania (**+12.6%**), Porto (**+12.1%**) and Naples (**+9.2%**).

GROUP 3: Sochi (**+79.6%**), Almaty (**+55.1%**), Belgrade (**+26.9%**), Charleroi (**+16.0%**) and Krakow (**+15.7%**).

GROUP 4: Tirana (**+91%**)**,** Varna (+**59.1%**), Madeira (**+43.5%**), Memmingen (**+40.3%**) and Yerevan-Zvartnots (**+37.6%**).

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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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