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Passenger traffic inching towards full recovery in October

Brussels, 4 December 2023: ACI EUROPE today released its air traffic report for October 2023.

Passenger traffic across the **European airport network** continued to defy inflated air fares and geopolitical tensions in **October** – with an increase of **+11.7%** compared to the same month last year. This resulted in volumes standing at just **-1.7%** below pre-pandemic levels (October 2019).

Olivier Jankovec, Director General of ACI EUROPE said: *"The momentum towards a full passenger traffic recovery for Europe's airports kept going strong in October – defying both air fares up by +36.3%*[1] *and the conflict in Israel adding further geopolitical tensions. Leisure, VFR and to a lesser extent blended travel were key demand drivers, extending dynamics normally associated with the peak Summer months into the autumn. At the same time and while still below where it used to be, business travel also contributed to getting Europe's airports almost back to their pre-pandemic volumes."*

"However, this on-going traffic momentum did not benefit all airports equally. There is no doubt that Europe has become a fragmented and multi-speed airport market when looking at passenger traffic performance. This reflects structural changes which only reinforce competitive pressures upon airports."

EU+ MARKET & INTERNATIONAL TRAFFIC OUTPERFORMING

Airports in the **EU+ market**[2] led the growth dynamic, with passenger traffic expanding by **+12.6%** (vs. October 2022). Meanwhile, those in the **rest of Europe**[3] saw their growth slowing down to **+7%**. This largely reflected the impact of the conflict in Israel which erupted on 7 October, and which resulted in airports in the country seeing passenger volumes decreasing by -40.8% over the full month.

As a result, when compared to pre-pandemic levels (October 2019):

- **EU+ airports** came closest ever to a full recovery in passenger traffic at **-1.3%**. Remarkably, international passenger traffic in the bloc nearly all recovered (-0.1%) compared to domestic traffic (-7.1%).

- Airports in the **rest of Europe** remained further behind at **-3.8%** - reversing previous gains which had seen them achieving a full recovery in Q3.

NATIONAL MARKETS & PERFORMANCE GAPS

As in previous months, performance gaps amongst national markets remained significant – reflecting geopolitical tensions as well as demand dynamics dominated by leisure & VFR[4] and driven by selective Ultra-Low Cost Carrier expansion.

- Accordingly, the best performances came from airports in emerging aviation markets boosted by traffic shifts resulting from war in Ukraine - such as Uzbekistan (+139%), Armenia (+66%) and Kazakhstan (+51%), and/or by Ultra-Low Cost Carrier stimulation – such as Albania (+134%).

  Within the EU+ market countries, the best performances came from relying on incoming tourism and VFR traffic: Iceland (+25%), Greece (+21%), Slovenia (+20%) and Portugal (+16%).

  Amongst the largest European markets, tourism-reliant Italy (+8%) and Spain (+8%) came on top, followed by the UK (-2%), France (-3%) and Germany (-16%).

- At the other end of the spectrum and apart from Ukraine which has lost all commercial air traffic since February 2022, airports in Israel (-49%), Finland (-32%), Sweden (-22%), Slovakia (-20%) and the Czech Republic (-18%) remained the farthest from a full recovery.

HUBS AND OTHER LARGER AIRPORTS PROGRESSING

Passenger traffic at **the Majors** (top 5 European airports) grew by **+14.6%** in **October** compared to the same period last year, but still remained –**5%** below their pre-pandemic levels (October 2019).

London-Heathrow (+18.1% vs. Oct 2022 | -0.5% vs. Oct 2019) further reinforced its position as the busiest European airport. The British hub was followed by **Istanbul** (+11.2% vs. Oct 2022 | +6.9% vs. Oct 2019), **Paris-CDG** (+10.5% vs. Oct 2022 | -10% vs. Oct 2019), **Amsterdam-Schiphol** (+18.5% vs. Oct 2022 | -9.5% vs. Oct 2019) and **Frankfurt** (+14.9% vs. Oct 2022 | -11.9% vs Oct 2019).

Amongst other large airports, **Manchester** (+5.1%), **Rome-Fiumicino** (+0.6%) and **Zurich** (-0.1%) achieved a full recovery in October - joining those who had already done so over the peak Summer months: **Athens** (+18.9%), **Palma de Mallorca** (+12.4%), **Paris-Orly** (+11%), **Lisbon** (+9.5%), **Istanbul-Sabiha Gökçen** (+6%), **Dublin** (+4%) and **London-Stansted** (+3.7%).

REGIONAL AIRPORTS WELL ABOVE PRE-PANDEMIC VOLUME

Regional and smaller airports[5] kept exceeding their pre-pandemic passenger traffic volumes in **October** by an impressive **+9.1%** - reflecting the above mentioned demand dynamics.

However, there were substantial variations in performance among regional airports, with those with less than 1 million passengers per annum remaining below pre-pandemic levels (-1.1%).

It was mostly regional airports serving popular tourist destinations and/or relying on Low-Cost Carriers that saw passenger volumes exceeding pre-pandemic levels (Q3 2019) – with some posting impressive results, including: **Trapani** (+259%), **Perugia** (+170%), **Kutaisi** (+83%), **Burgas** (+73%), **Memmingen** (+57%), **Funchal** (+52%), **Zakynthos** (+50%), **Lodz** (+46%), **Menorca** (+40%) and **Kerkyra** (+38%).

FREIGHT & AIRCRAFT MOVEMENTS

In **October**, **freight traffic** across the **European airport network** increased by **+2.2%** compared to the same period last year, with EU+ airports at +1.3% and those in the rest of Europe at +7.9%. Overall, freight traffic remains at a **-9.5%** deficit compared to pre-pandemic (October 2019) levels.

Amongst the top 10 European airports for freight traffic, the best performances in October when compared to pre-pandemic volumes came from: **Milan-MXP** (+19%), **Istanbul** (+15.2%), **Madrid** (+12.3%), **Liège** (+5.4%) and **Leipzig-Halle** (+4.7%).

Aircraft movements increased by **+8.7%** in **October** across the European airport network compared to the same period last year, and remained **–4.5%** below pre-pandemic (October 2019) levels.

DATA BY AIRPORT GROUPS

Throughout **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), airports welcoming between 1 million and 5 million passengers per year (Group 4), and airports welcoming between 100.000 and 1 million passengers (Group 5) reported an average change in passenger traffic of -4.5%, -8.1%, +13.2%, +6.3% and -1.1% - as compared to their pre-pandemic (October 2019) levels.

The airports that reported the highest increases in passenger traffic (vs October 2019) are as follows:

GROUP 1: Athens **ATH** (+18.9%), Palma de Mallorca **PMI** (+12.4%), Paris **ORY** (+11.0%), Lisbon **LIS** (+9.5%), Istanbul **IST** (+6.9%).

GROUP 2: Porto **OPO** (+21.1%), Málaga **AGP** (+18.2%), Naples **NAP** (+17.4%), Catania **CTA** (+17.0%), Milan **BGY** (+16.6%).

GROUP 3: Milan **LIN** (+568.8%), Sochi **AER** (+125.2%), Almaty **ALA** (+52.6%), Astana **NQZ** (+49.6%), Belgrade **BEG** (+32.2%).

GROUP 4: Tirana **TIA** (+133.7%), Burgas **BOJ** (+72.9%), Yerevan **EVN** (+65.9%), Memmingen **FMM** (+57.1%), Vrellë/Lipjan **PRN** (+56.1%).

GROUP 5: Trapani **TPS** (+259.2%), Perugia **PEG** (+169.6%), Porto Santo **PXO** (+139.6%), Samarkand **SKD** (+139.1%), Kutaisi **KUT** (+83.1%).

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[1] Source: RDC air fares Europe to all destinations in October 2023 vs October 2019
[2] EU, EEA, Switzerland, and UK.
[3] Albania, Armenia, Belarus, Bosnia & Herzegovina, Georgia, Israel, Kazakhstan, Kosovo, Northern Macedonia, Moldova, Montenegro, Russia, Serbia, Turkey, Ukraine, and Uzbekistan.
[4] Visiting Friends and Relatives.
[5] Airports with less than 10 million passenger per annum (2019).

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