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April passenger traffic surges close to full recovery

Brussels, 5 June 2024: European airport trade body ACI EUROPE today released its air traffic report for April 2024.

Passenger traffic across the **European airport network** increased by **+8.5%** in **April** compared to the same month last year. This resulted in volumes standing at just **-0.2%** below their pre-pandemic (2019) level – a hair's breadth away from a full recovery.

NON-EU+ MARKET IN THE LEAD

The **non-EU+ market**[1] outperformed with passenger traffic expanding by **+13.4%** over the same month last year, driven by bumper increases reported by airports in Kazakhstan (+150%), Albania (+67%), Uzbekistan (+54%) and those in the larger market of Türkiye (+19%) also growing dynamically.

The non-EU+ market surpassed pre-pandemic (April 2019) levels by **+5.6%** despite geopolitics resulting in the total loss of passenger traffic at Ukrainian airports and significant decreases at airports in Israel (-42%) and Russia (-22%). Airports in Albania (+261%), Uzbekistan (+171%), Kazakhstan (+83%) and Armenia (+86%) led the bloc's growth dynamic compared to 2019 volumes.

SIGNIFICANT PERFORMANCE GAPS ACROSS EU+ MARKET

Meanwhile, the **EU+ market**[2] saw passenger traffic increasing by **+7.7%** in April compared to the same month last year. The best performances came from airports in Estonia (+28%), the Czech Republic (+18%), Slovenia (+17%) and Poland (+17%), while the weakest ones came from those in Sweden (-0.1%), Ireland (+0.6%), Latvia (+1.8%) and Portugal (+2.4%).

The EU+ market came very close to a full recovery of its pre-pandemic volumes (April 2019) at **-1.1%**, but with significant performance gaps amongst national markets:

- Airports in markets relying on leisure and VFR[3] demand far exceeded 2019 volumes, including those in Greece (+21.7%), Croatia (+20.9%), Poland (+20.3%), Malta (+18.5%), Iceland (+17.2%), Luxembourg (+17%) and Portugal (+13.6%).

- Conversely, airports in Finland (-30.6%), Slovenia (-29.5%), Slovakia (-24.1%) and Sweden (-23.6%) remained the farthest from recovering their pre-pandemic volumes.

- Amongst the largest EU+ markets, the best performance also came from airports predominantly relying on leisure and VFR demand with Italy (+13.9%) and Spain (+10.8%) expanding on their pre-pandemic volumes, followed by the UK (-3.9%), France (-6.9%) and further behind Germany (-19.2%).

PERFORMANCE VARIATIONS ACROSS AIRPORT CATEGORIES

Passenger traffic at **the Majors**[4] expanded by **+8.6%** in April when compared to the same month last year and stood at **-1.6%** when compared to pre-pandemic volumes (April 2019):

- **London Heathrow** (+4.8% vs. Apr 2023 | -1.4% vs. Apr 2019) remained the busiest European airport, followed by **Istanbul** (+10.5% vs. Apr 2023 | +22.4% vs. Apr 2019) where passenger traffic was far above pre-pandemic level.

- **Paris-CDG** (+4.8% vs. Apr 2023 | -11.5% vs. Apr 2019) came in the 3rd position, followed by **Amsterdam Schiphol** (+6.7% vs. Apr 2023 | -10.4% vs. Apr 2019) and **Madrid** (+10.6% vs. Apr 2023 | +6.7% vs. Apr 2019).

- **Rome-Fiumicino** kept recording the highest growth compared to the same month last year at +26.6% (+10.8% vs. Apr 2019).

Amongst **Mega and Large airports**[5], the highest increases in April came from **Antalya** (+58% vs. Apr 2023 | +8.6% vs. Apr 2019), **Istanbul Sabiha Gökçen** (+20.6% vs. Apr 2023 | +13.2% vs. Apr 2019), **Prague** (+17.3% vs. Apr 2023 | -11% vs. Apr 2019), **Munich** (+17.1% vs. Apr 2023 | -14% vs. Apr 2019), **Athens** (+16.2% vs. Apr 2023 | +21.5% vs. Mar 2019) and **Budapest** (+16% vs. Apr 2023 | +4.1% vs. Apr 2019).

Medium airports[6] posted the best performance in April when compared to pre-pandemic (April 2019) levels at **+9.4%**. Airports reporting the highest increases in that category included **Zadar** (+105% vs. Apr 2023 | +45.3% vs. Apr 2019), **Girona** (+87.9% vs. Apr 2023 | -2.7% vs. Apr 2019), **Tirana** (+67.2% vs. Apr 2023 | +260% vs. Apr 2019), **Sarajevo** (+49.4% vs. Apr 2023 | +49% vs. Apr 2019), **Chisinau** (+44% vs. Apr 2023 | +15.3% vs. Apr 2019) and **Erzurum** (+43.2% vs. Apr 2023 | +22.8% vs. Apr 2019).

As in the past months, larger **Low Cost bases** kept outperforming when compared to pre-pandemic levels (Apr 2019): **Memmingen** (+63.4%), **Beauvais** (+63%) **Bergamo** (+28.6%) and **Charleroi** (+21.7%).

Conversely, **Small airports**[7] posted the weakest performance with a **+4.4%** increase in passenger traffic in April compared to the same month last year – and remained **-31.5%** below their pre-pandemic levels (Apr 2019).

FREIGHT & AIRCRAFT MOVEMENTS

In April, **freight traffic** across the **European airport network** increased by **+12.4%** over the same period last year, with **EU+ airports** at **+12.1%** and those in the **rest of Europe** at **+14.6%**. Overall, freight traffic stood at **+2.5%** above pre-pandemic (April 2019) levels.

Amongst the top 10 European airports for freight traffic, the best performances in April compared to the same month last year came from: **Istanbul** (+42.7%), **Madrid** (+18.2%), **Milan-MXP** (+15.1%), **Liège** (+14.2%) and **Frankfurt** (+11.6%).

Aircraft movements increased by **+7.4%** in April across the **European airport network** compared to the same period last year, and remained **-4.1%** below pre-pandemic levels (April 2019).

DATA BY AIRPORT GROUPS

Throughout April, airports welcoming more than 40 million passengers per year (Majors), airports welcoming between 25 and 40 million passengers (Mega), airports welcoming between 25 and 10 million passengers (Large), airports welcoming between 1 million and 10 million passengers per year (Medium), and airports welcoming between 1000 and 1 million passengers (Small) reported an average change in passenger traffic of -1.6%, +2.6%, -6%, +9.4% and -31.5% as compared to their pre-pandemic (April 2019) levels.

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

MAJORS: Istanbul IST (+22.4%), Rome FCO (+10.8%), Madrid MAD (+6.7%), Barcelona BCN (+1.7%), London LHR (-1.4%)

MEGA: Athens ATH (+25.1%), Istanbul SAW (+13.2%), Palma de Mallorca PMI (+11.7%), Lisbon LIS (+10.5%), Antalya AYT (+8.6%)

LARGE: Sochi AER (+81.6%), Milan Bergamo BGY (+28.6%), Catania CTA (+21.1%), Porto OPO (+20.0%), Naples NAP (+19.7%)

MEDIUM: Trapani TPS (+210.1%), Tirana TIA (+260.8%), Samarkand SKD (+171.8%), Skiathos JSI (+128.4%), Reus REU (+87.4%)

SMALL: Siirt SXZ (+220%), Babimost IEG (+172.3%), Baia Mare BAY (+141.1%), Castellón CDT (+139.8%), Perugia PEG (+134.6%)

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[1] Albania, Armenia, Belarus, Bosnia & Herzegovina, Georgia, Israel, Kazakhstan, Kosovo, North Macedonia, Moldova, Montenegro, Russia, Serbia, Türkiye, Ukraine and Uzbekistan
[2] EU, Norway, Iceland, Switzerland and UK.
[3] Visiting Friends and Relatives
[4] Airports with more than 40 million passengers per annum (2023).
[5] Airports with 10 to 40 million passengers per annum (2023)
[6] Airports with 1 to 10 million passengers per annum (2023)
[7] Airports with less than 1 million passengers per annum (2023).

ENDS

Note to editors

ACI EUROPE Airport Traffic Reports are the only air transport reports to include all types of airline passenger flights to, from and within Europe: full service, low cost, charter and others. ACI EUROPE has recently expanded their monthly coverage to include over 450 airports, representing over 95% of European airport traffic.

The ACI EUROPE Airport Traffic Reports are a dedicated service for ACI EUROPE members and accredited journalists, available in the password protected sections of the 'Media Room' and the 'Members Room' on our website www.aci-europe.org.

For your password to access these sections, please contact us by e-mail at: caroline.kjaergaard-heiss@aci-europe.org. Your request will be validated and the password will be e-mailed to your work address.

The report presents data for ACI EUROPE Members and might not be representative of the total European airport traffic.

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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.