Air traffic finally above pre-pandemic levels in the first half of 2024

Brussels, 31 July 2024: European airport trade body ACI EUROPE today released its air traffic report for the month of June, as well as Quarter 2 (Q2) and the first half (H1) of 2024.

Passenger traffic across the European airport network increased by **+9%** in **H1** compared to the same period last year, with the pace of growth in **Q2 (+8%)** remaining very dynamic – although easing somewhat compared to **Q1 (+10.2%)**. International traffic kept being the main growth driver in H1 (+10.3%), expanding at more than twice the rate of domestic traffic (+4.2%).

This brought H1 passenger volumes at **+0.4% above H1 2019 levels** – finally confirming a full recovery from the Covid-19 pandemic for the airport industry.

Olivier Jankovec, Director General of ACI EUROPE commented: "*As overall passenger traffic finally made it above 2019 levels over a full 6-month period, our industry has now turned the corner on the pandemic. But beyond these headline figures, the European airport market has become extremely fragmented in terms of traffic performance – with only 53% of airports having actually fully recovered their pre-pandemic passenger volumes in June. This reflects structural changes in both demand and supply – with leisure & VFR[1] passengers and Ultra-Low Cost Carriers along with Turkish Airlines very much driving growth. This also reflects the dynamism of aviation markets in parts of Eastern Europe and Central Asia along with geopolitics' on-going impact on specific markets, for better or worse depending on their location.*"

Looking at the peak Summer months of Q3 and beyond, Jankovec added: "*We are in for our best Summer ever in terms of passenger traffic, even though the unprecedented global IT outage earlier this month combined with recurrent Air Traffic Management capacity shortages and aircraft delivery delays are all taking a toll on airport traffic. What comes next will largely depend on whether demand remains resilient and sustained when the autumn comes. That will in turn depend on how currently mixed macro-economic signals end up playing out – from falling inflation and stable unemployment rates to decreases in industrial production and economic sentiment. For now, what certainly keeps us awake at night is whether Schengen States will effectively be ready for the start of operation of the bloc's Entry Exit System planned for next November. If not, we might be in for major disruptions.*"

PERSISTENT GAPS IN PERFORMANCE AMONGST NATIONAL MARKETS

Airports in the **EU+ market[2]** saw passenger traffic increase by **+9.5%** in **H1** compared to the same period last year – coming right at their pre-pandemic levels **(0%)**.

In **June**, the best passenger traffic performances in the EU+ market when **compared to pre-pandemic (June 2019)** came from airports relying predominantly on leisure & VFR-driven demand: Poland (+24.5%), Greece (+23.9%), Malta (+19.1%), Luxembourg (+16.9%), Portugal (+14.2%) and Croatia (+13.6%). Conversely, airports in Finland (-26.4%), Slovenia (-21.5%), Bulgaria (-20.5%) and Sweden (-19.4%) remained the farthest from a full recovery.

Amongst the largest EU+ markets, airports in Italy (+13.1%) and Spain (+8%) posted the best results, followed by those in the UK (-1.1%), France (-4%) and Germany (-17%).

Airports in the **rest of Europe[3]** posted an increase of **+5.8%** in **H1** compared to the same period last year – resulting in volumes standing at **+2.9%** above pre-pandemic.

In **June**, the best passenger performances in the rest of Europe when compared to pre-pandemic (June 2019) came from airports in Albania (+243%) buoyed by Ultra-Low Cost Carriers' expansion, as well as from those in Uzbekistan (+202%), Armenia (+78%) and Kazakhstan (+67%).

Airports in the major market of Türkiye (+9.2%) also stood well above their pre-pandemic levels – while those in Israel (-33.4%) continued to report traffic losses due to instability in the region.

The **top 5 European airports** welcomed a total of **174.6 million passengers in H1** – an increase of **+8%** over the same period last year and **+2% above their pre-pandemic (H1 2019) levels.**

- **London Heathrow** remained the busiest European airport with **39.8 million passengers** in H1 (+7.4% vs. H1 2023 | +2.8% vs. H1 2019), followed by **Istanbul** which handled **38.1 million passengers** (+6.9% vs. H1 2023 | +18.1% vs. H1 2019).

- The Turkish hub was followed by **Paris-CDG** at **33.2 million passengers** (+4.4% vs. H1 2023 | -8.7% vs. H1 2019), **Amsterdam Schiphol** with **31.8 million passengers** (+11% vs. H1 2023 | -7.9% vs. H1 2019) and **Madrid** with **31.7 million passengers** (+11.3% vs. H1 2023 | +8.3% vs. H1 2019).

Amongst **other Major[4] and Mega[5] airports**, the best performances in **H1** came from **Rome Fiumicino** which saw passenger volumes expanding by an impressive +26% compared to the same period last year (+9.8% vs H1 2019), **Antalya** (+19.8% vs. H1 2023 | +7.1% vs. H1 2019), **Istanbul Sabiha Gökçen** (+16.6% vs. H1 2023 | +18.5% vs. H1 2019) and **Athens** (+16.1% vs. H1 2023 | +24.5% vs. H1 2019).

Medium airports[6] posted the best performance in **H1,** increasing their passenger traffic by **+10.8%** when compared to the same period last year and **largely exceeding their pre-pandemic levels (+9.4%)**.

Meanwhile, the largest **continental Ultra-Low Cost Carriers' bases** also kept outperforming in H1: **Beauvais** (+18.8% vs. H1 2023 | +62.4% vs. H1 2019), **Memmingen** (+16.5% vs. H1 2023 | +73.7%

vs. H1 2019), **Charleroi** (+10.8% vs. H1 2023 | +25.9% vs. H1 2019) and **Bergamo** (+10% vs. H1 2023 | +30.1% vs. H1 2019).

Conversely, **small airports**[7] posted the weakest performance in **H1** with a **+5.7%** increase in passenger traffic compared to the same period last year and remaining **-35.7%** below their pre-pandemic levels (H1 2019).

FREIGHT & AIRCRAFT MOVEMENTS

In **H1**, **freight traffic across the European airport network** increased by **+9.6%** over the same period last year, with **EU+ airports** at **+8.1%** and those in the **rest of Europe** at **+20.1%**. Overall, freight traffic stood at **+6.2% above pre-pandemic (H1 2019) levels**.

Amongst the **top 10 European airports for freight traffic**, the best performances in H1 compared to the same period last year came from: **Istanbul** (+32.2%), **Madrid** (+19.3%), **London-Heathrow** (+15.8%), **Liège** (+15.0%), **Milan-Malpensa** (+12.2%) and **Frankfurt** (+9.1%).

Aircraft movements increased by **+6.4%** in **H1 across the European airport network** compared to the same period last year, and remained **-5.3% below pre-pandemic levels (H1 2019)**.

DATA BY AIRPORT GROUPS

The airports that reported the highest increases in passenger traffic in H1 when compared to the same period pre-pandemic (H1 2019) are as follows:

MAJORS: Istanbul IST (+18.1%), Rome FCO (+9.8%), Madrid MAD (+8.3%), Barcelona BCN (+5.1%), London LHR (+2.8%).

MEGA: Athens ATH (+24.5%), Istanbul SAW (+18.5%), Lisbon LIS (+14.4%), Palma de Mallorca PMI (+13.3%), Antalya AYT (+7.1%).

LARGE: Sochi AER (+90.8%), Milan Bergamo BGY (+30.1%), Malaga AGP (+24.8%), Catania CTA (+22.9%), Alicante ALC (+21.8%).

MEDIUM: Tirana TIA (+239.3%), Samarkand SKD (+191.6%), Trapani TPS (+125.7%), Kutaisi KUT (+104%), Zadar ZAD (+93.9%).

SMALL: Babimost IEG (+176.4%), Perugia (+129.9%), Pori POR (+115.2%), Bucharest BBU (+88.4%), La Gomera GMZ (+78%).

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[1] Visiting Friends and Relatives
[2] EU, Norway, Iceland, Switzerland and the UK
[3] Albania, Armenia, Belarus, Bosnia & Herzegovina, Georgia, Israel, Kazakhstan, Kosovo, North Macedonia, Moldova, Montenegro, Russia, Serbia, Türkiye, Ukraine and Uzbekistan
[4] Airports with more than 40 million passengers per annum.
[5] Airports with 25 to 40 million passengers per annum.
[6] Airports with 1 to 10 million passengers per annum.
[7] Airports with 1000 to 1 million passengers per annum.

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.

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

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