Europe's airports welcomed over 250 million passengers in August

Brussels, 4 October 2024: European airport trade body ACI EUROPE today released its air traffic report for August 2024 – the peak month for air travel in Europe.

Passenger traffic across the **European airport network** increased by **+5.6%** in **August** compared to the same month last year – an even better performance than in the preceding month (July at +5.1%). This resulted in passenger volumes standing well above (+2.3%) their pre-pandemic level (August 2019).

Reflecting structural changes in demand, that performance was solely driven by international passenger traffic (+7.1% vs. August 2023), whilst domestic passenger traffic registered a slight decrease (-0.2% vs. August 2023).

Olivier Jankovec, Director General of ACI EUROPE said: *"Europe's airports welcomed 251.5 million passengers through their doors during the peak Summer month of August – quite a feat considering the many headwinds our industry keeps facing: from escalating geopolitical tensions, much increased air fares and other supply pressures to chronic Air Traffic Management capacity issues.*

If anything, that speaks volumes about the fact that air travel is an intrinsic part of our European way of life. That in turn calls for better policies and regulations. This is much needed at EU level – to effectively support and enable aviation decarbonisation, but also at national level – just think about the still unresolved passenger cap at Dublin airport or this week's ill-advised plans by France to suffocate air connectivity under more taxes."

DYNAMIC GROWTH AT EU+ AIRPORTS – BUT PERFORMANCE GAPS REMAIN

Airports in the **EU+ market**[1] outperformed in August with passenger traffic expanding by **+7%** over the same month last year – and thus surpassing pre-pandemic (August 2019) levels by +2.5%.

Many national markets – mostly across the South-East axis – achieved double digit growth when compared to their pre-pandemic (August 2019) levels, including Poland (+25.5%), Luxembourg (25.4%), Iceland (+21.1%), Malta (+19.4%), Greece (+18.7%), Portugal (+14.3%), Italy (+14.2%), Croatia (+13.1%) and Cyprus (+11%).

Conversely, the impact of the war between Russia and Ukraine along with structural market changes and policy factors kept hampering the recovery of airports in other markets, in particular Finland (-27.4%), Slovenia (-21.5%), Sweden (-21.2%), Bulgaria (-20.1%), Germany (-13.4%) and Latvia (-11.1%).

Meanwhile, airports in the UK (-0.4%) and France (-0.9%) came very close to a full recovery.

NON-EU+ AIRPORTS UNDERPERFORMING DUE TO GEOPOLITICAL TENSIONS

Airports in the **non-EU+ market**[2] saw passenger traffic decreasing by **-1.5%** in August compared to the same month last year – the first negative monthly performance since the start of the recovery from the Covid-19 pandemic.

This was primarily due to a significant drop in domestic passenger traffic (-6.2%), and also reflected the harsh impact of the two military conflicts directly affecting the region – with airports in Ukraine having lost all passenger traffic for 30 months and those in Russia (-12.9%) and Israel (-43.5%) standing well below their pre-pandemic level (August 2019).

But the **non-EU+ market**[2] saw even more extreme performance gaps than the EU+ one, with airports in Albania (+192.9%), Uzbekistan (+174%), Armenia (+66.8%), Kazakhstan (+54%), Georgia (+49.8%), Kosovo (+48.2%) and Moldova (+38%) way above their pre-pandemic levels (August 2019). These impressive performances reflected both the intrinsic dynamism of these national market with the propensity to fly rising sharply along with demand from/to Russia having shifted away from the EU+ market.

MAJOR AIRPORTS LEADING WHILST SMALLER AIRPORTS STILL FAR FROM RECOVERY

Passenger traffic at **the Majors**[3] expanded by **+6.7%** in August when compared to the same month last year – marking the first month in which they outperformed all other segments of the airport industry and also allowing them to finally exceed (+0.2%) their pre-pandemic (August 2019) levels.

- **London Heathrow** (+5.5% vs. August 2023 | +3.8% vs. August 2019) remained the busiest European airport, followed by **Istanbul** in the second position**.** The Turkish hub saw modest passenger traffic growth (+1.7%) compared to the same month last year largely due to maintenance issues forcing Turkish Airlines to ground a significant part of its fleet. However, it boasted the best performance (+14.8%) amongst the Majors against its pre-pandemic levels (August 2019).

- **Paris-CDG** (+5.3% vs. August 2023 | -8.15% vs. August 2019) came in the 3rd position, followed by **Amsterdam Schiphol** (+6.0% vs. August 2023 | -5.8% vs. August 2019) and **Frankfurt** (+3.7% vs. August 2023 | -12.1% vs. August 2019). The German hub made it back to the top 5 European airports league in August for the very first time since the onset of the recovery from the Covid-19 pandemic.

- **Rome-Fiumicino** kept recording the highest growth amongst the Majors compared to the same month last year at +20.6% (+13.5% vs. August 2019).

Amongst **Mega and Large airports**[4], the highest increases in August when compared to the same month last year came from **Catania** (+21.1%), **Budapest** (+20.8%), **Alicante** (+15.4%), **Tenerife** (+14.4%), **Copenhagen** (+14.3%), **Warsaw** (+12.9%), **Prague** (+12.4%), **Munich** (+11.8%) and **Athens** (+10.4%).

Medium airports[5] posted the second best performance in August when compared to the same month last year at **+6.2%**. Airports reporting the highest increases in that category included **Chisinau** (+52.6%), **Ostrava** (+41.8%), **Tirana** (+40.5%), **Poznan** (+29%), **Tivat** (+28.6%) and **Tbilisi** (+25.5%).

As in the past months, larger **Low Cost bases** kept outperforming: **Beauvais** (+20.5%), **Memmingen** (+12.4%), **Charleroi** (+12.3%) and **Bergamo** (+10.2%).

Conversely and reflecting a new aviation market reality, **small airports**[6] posted the weakest performance with a **+3.9%** increase in passenger traffic in August compared to the same month last year – and remained **-24.9%** below their pre-pandemic levels (August 2019).

FREIGHT & AIRCRAFT MOVEMENTS

In August, **freight traffic** across the **European airport network** increased by **+12.6%** over the same period last year, with **EU+ airports** at **+12.2%** and those in the **rest of Europe** at **+15.1%**. Overall, freight traffic stood at **+3.6%** above <u>pre-pandemic levels (August 2019)</u>.

Amongst the top 10 European airports for freight traffic, the best performances in August compared to the same period last year came from: **Madrid** (+24.9%), **Istanbul** (+20.4%), **Amsterdam Schiphol** (+15.2%), **Luxembourg** (+12.4%) and **Frankfurt** (+11.1%).

Aircraft movements increased by **+3.6%** in August across the **European airport network** over the same period last year and came very close to a full recovery at **-0.6%** compared to pre-pandemic levels (August 2019).

DATA BY AIRPORT GROUPS

Throughout August, 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 +0.2%, +3.6%, -2.8%, +11.8% and -24.9% as compared to their pre-pandemic levels (August 2019).

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

MAJORS: Istanbul IST (+14.8%), Rome FCO (+13.5%), Madrid MAD (+4.8%), London LHR (+3.8%), Barcelona BCN (+0.1%)

MEGA: Athens ATH (+19.7%), Paris ORY (14.6%), Istanbul SAW (+13%), Lisbon LIS (+8.3%), Palma de Mallorca PMI (+7.2%),

LARGE: Sochi AER (+112.9%), Naples NAP (+30.8), Milan Bergamo BGY (+25.9%), Porto OPO (+23.8%), Málaga AGP (+20.4%)

MEDIUM: Trapani TPS (+227.3%), Tirana TIA (+192.9%), Samarkand SKD (+174%), Zadar ZAD (+117.7%), Kutaisi KUT (+116.9%)

SMALL: Bucharest BBU (+1405.9%), Pardubice PED (+283.2%), Karlovy Vary KLV (+216.9%), Perugia PEG (+195.8%), Babimost IEG (+175.7%)

_____

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

For more information, contact:

Agata Lyznik
Director of Communications & Media
Tel: +32 2 552 09 89
Email: agata.lyznik@aci-europe.org

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.