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Europe's airports continue strong passenger growth in October

Brussels, 03 December 2024: European airport trade body ACI EUROPE today released its air traffic report for October 2024, revealing sustained growth in passenger traffic across the continent's airport network.

Passenger numbers increased by a robust **+5.5%** compared to October 2023, in line with the growth reported in the preceding quarter (**+5.2% in Q3**). As a result, traffic volumes now stand **+3.3% above pre-pandemic levels** (October 2019).

This growth was driven by **strong international passenger traffic**, which surged **+7.1% year-on-year**, while domestic passenger traffic remained essentially flat at -0.1% compared to October 2023.

Olivier Jankovec, Director General of ACI EUROPE said: "*October saw passenger traffic staying on the upward trajectory, continuing the positive trend we have seen throughout 2024. This reflects changing travel patterns and shifting seasonality, with extended demand for leisure and visits to friends and relatives (VFR) beyond the traditional summer peak into the 'shoulder season' that precedes the off-season Winter months. This also reflects strong demand resilience despite air fares having increased on average by +30% this year compared to pre-Covid, softening economic sentiment and increasing geopolitical tensions.*

While Europe's airport network as a whole has now exceeded pre-pandemic traffic levels, the reality remains that 45% of them still remain below such levels in October — with performance diverging widely across both national markets and the different segments of our industry. The root causes are supply pressures, geopolitics, and the new post-pandemic aviation market reality."

MULTI-SPEED AIRPORT MARKET & NATIONAL PERFORMANCE VARIATIONS

Airports within the **EU+ market**[1] saw a +5.7% increase in passenger traffic compared to October 2023, surpassing pre-pandemic levels (October 2019) by **+3.9%**.

Volume growth was particularly strong in Eastern and Southern EU countries, with several nations achieving double digit growth over October 2023: Estonia (+19.2%), Hungary (+18.8%), Croatia (+18.6%), Czechia (+15%), Cyprus (+11%) and Finland (+10.7%).

Amongst largest EU+ markets, Italy (+9.1%) and Spain (+6.2%) posted the strongest results, followed by Germany (+4.1%), the UK (+2.7%) and France (+2.1%).

However, Germany remains the furthest from pre-pandemic recovery, showing a -12.1% decline compared to October 2019 — in great part due to ill-advised national aviation policies, especially as regards taxation, which have constrained market recovery and air connectivity developments.

Meanwhile, airports in the **non-EU+ market**[2] saw passenger traffic increasing by **+4.5%** year-on-year, achieving a full recovery to 2019 levels **(+0.2%)**.

That market continued to register even starker national performance gaps, as this is where the impact of geopolitical tensions and conflicts is the harshest — with airports in Ukraine still unable to restart commercial operations and those in Israel (-7.2% vs October 2023 | -52.6% vs October 2019) seeing continued decreasing passenger traffic. Instability in the Near East also limited growth at airports in the major market of Türkiye (+2.5%), along with aircraft maintenance issues at the national air carrier.

Conversely, volumes keep growing at impressive rates in Albania (+47.5%), Uzbekistan (+22.2%), Kosovo (+21.5%) and Georgia (+21.8%) when compared to October 2023.

MAJOR AIRPORTS LEADING & SMALLER AIRPORTS STILL FAR FROM RECOVERY

Passenger traffic at Europe's **Majors**[3] expanded by **+4.9%** in October compared to the same month last year — bringing them just **+0.7% above pre-pandemic levels (October 2019)**.

- **Rome-Fiumicino** (+15.1%), **Barcelona** (+8.2%) and **Madrid** (+5.5%) posted the best performances over last year.

- **London Heathrow** (+3.7%) retained its position as Europe's busiest airport, followed by **Istanbul** (+3.6%) and **Paris-CDG** (+3.9%).

- **Frankfurt** saw minimal growth (+0.3%), reflecting the weakness of the German aviation market.

Amongst **Mega and Large airports**[4], the highest year-on-year increases came from **Budapest** (+19.8%), **Prague** (+14.7%), **Alicante** (+13.3%), **Milan-Malpensa** (+13.3%) and **Athens** (+10.1%). While **Dublin** had until recently been amongst those airports registering sustained growth, the Irish hub saw passenger volumes slightly decreasing (-0.1%), as a result of the passenger cap imposed on the airport.

A number of **Medium airports**[5] delivered even more impressive passenger traffic increases in October, including those serving tourist destinations that remained attractive in the autumn: **Tirana** (+47.5%**),** **Poznań** (+29.1%), **Olbia** (+27.1%), **Dubrovnik** (+26.7%), **Sarajevo** (+24.2%), **Tbilisi** (+23.7%) **Samarkand** (+22.2%) and **Kraków** (+18.5%).

Meanwhile, **Small airports**[6] posted the strongest year-on-year performance amongst the different airport industry segments at **+10.2%** — yet they remain a staggering **-31.6% below their pre-pandemic passenger levels** (October 2019).

FREIGHT & AIRCRAFT MOVEMENTS

In October, **freight traffic** across the **European airport network** increased by **+10.7%** over the same period last year, with **EU+ airports** at **+10.3%** and those in the **rest of Europe** at **+13.9%**. Despite the growth, freight volumes remained **-0.6%** below pre-pandemic levels (October 2019).

Amongst the top 10 European airports for freight traffic, the best performances year-on-year came from: **Madrid** (+20.1%), **Liège** (+15.4%), **Istanbul** (+13.8%), **Milan-Malpensa** (+8.3%) and **Koln-Bonn** (+7%).

Aircraft movements grew by **+7.5%** in October across the **European airport network** over the same period last year and stood at **-2.5%** below pre-pandemic levels (October 2019).

DATA BY AIRPORT GROUPS

Throughout October, 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 +0.7%, +6.4%, -1.9%, +14.4% and -31.6% as compared to their pre-pandemic levels (October 2019).

The airports that reported the highest increases in passenger traffic compared to October 2019 are as follows:

MAJORS: Rome FCO (+15.8%), Istanbul IST (+10.9%), Barcelona BCN (+6.8%), Madrid MAD (+3.4%), London LHR (+3.2%)

MEGA: Athens ATH (+30.9%), Palma de Mallorca PMI (+19.4%), Lisbon LIS (+13.3%), Manchester MAN (+12.4%), Istanbul SAW (+11.7%)

LARGE: Sochi AER (+125.1%), Málaga AGP (+29.6%), Catania CTA (+27.6%), Alicante ALC (+25.9%), Tenerife TFS (+24.9%)

MEDIUM: Milan LIN (+641%), Tirana TIA (+244.6%), Trapani TPS (+221%), Samarkand SKD (+192.2%), Skiathos JSI (+162.9%)

SMALL: Castellón CDT (+189.8%), Perugia PEG (+166.3%), Porto Santo PXO (+150.1%), Pardubice PED (+149.6%), Babimost IEG (+143.7%)

1 EU, Norway, Iceland, Switzerland and the 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)

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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.

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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. Airports and air connectivity support 14 million jobs, generating €851 billion in European economic activity (5% 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.