European airport passenger traffic finally exceeds annual pre-Covid levels in 2024

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- **2.5 billion passengers welcomed by Europe's airports in 2024**[1]
- **Passenger traffic increased by +7.4% over 2023 and stood +1.8% above pre-pandemic levels (2019)**
- **47% of Europe's airports still below their pre-pandemic volumes – with structural aviation market changes and geopolitics resulting in significant performance gaps across national & individual airport markets**
- **TOP 5 European airports: *1. London Heathrow 2. Istanbul 3. Paris CDG 4. Amsterdam Schiphol 5. Madrid***
- **Smaller airports still -34.5% below pre-pandemic levels**

Brussels, 12 February 2025: The Full Year 2024 traffic report released today by ACI EUROPE confirms that Europe's airports finally surpassed pre-Covid (2019) passenger volumes last year – welcoming more than 2.5 billion passengers.[2]

Passenger traffic across the European airport network in 2024 increased by +**7.4%** when compared to the preceding year, finishing +**1.8%** above pre-pandemic (2019) levels.

The growth dynamic was:

- Mostly driven by **international passenger traffic** (+8.8% vs. 2023) rather than **domestic passenger traffic** (+2.5% vs. 2023) – which remained -6.3% below pre-pandemic (2019) levels.

- More pronounced in the first half of the year (H1 at +8.9% vs. H2 at +6%) as well as during off-peak months traditionally associated with lower traffic.

This reflects structural aviation market changes, including a partial modal shift to rail, strong cross-border mobility within the EU Single Market, and fast-growing demand in emerging markets outside the EU.

Olivier Jankovec, Director General of ACI EUROPE said: "*Europe's airports welcomed an additional 200 million passengers last year, with many surpassing their previous historic records. This was achieved despite much inflated air fares, continued supply pressures, mostly tepid economic growth and geopolitical tensions. That clearly speaks volumes about how consumers are now prioritising experiences and travel in particular.*"

"*But 2024 also confirmed major structural post-Covid shifts, with leisure & Visiting Friends and Relatives (VFR) demand and Low-Cost Carriers largely defining traffic performance – along with airline consolidation, changing air connectivity dynamics and geopolitics. This means that beyond our positive headline results, nearly half of Europe's airports remained below their pre-pandemic traffic levels last year. We are now in a multi-speed European airport market where competitive pressures just keep rising.*"

Jankovec added: "*Looking at the months ahead, we expect demand for air travel to remain resilient – defying fragile consumer confidence and generally* *sluggish European economies. We are thus forecasting a +4% growth in passenger traffic for 2025 – but we will need to keep that forecast under review, considering the overwhelming global political and economic uncertainties. For now, downside traffic risks mainly relate to airlines' fleet management woes, ATM capacity shortages, ill-advised aviation policies – and, of course, geopolitics."*

MULTI-SPEED EUROPEAN AIRPORT MARKET

Airports in the **EU+ market**[3] saw passenger traffic increasing by **+7.8%** in 2024 when compared to the previous year, outperforming those in the **rest of Europe**[4] **(+5.2%)**, where the impact of geopolitics was more acute – hitting airports in Israel (-33.3%), Russia (-13.5%) and of course Ukraine (no traffic).

The best performing EU+ markets were those in the Eastern part of the bloc, where the propensity to fly keeps converging with more mature markets, as well as those in the South relying on inbound tourism: Hungary and Czechia (+18.9%), Estonia (+18%), Poland (+15.6%), Malta (+14.8%), Croatia (+13.7%), Italy (+11.0%) and Greece (+10.1%).

In the rest of Europe, airports in Albania (+47.5%), Moldova (+46.0%), Uzbekistan (+36.6%), Bosnia & Herzegovina (+33.8%) and Georgia (+23.9%) posted impressive growth.

When compared to pre-Covid (2019) levels, 2024 performance gaps in passenger traffic were stark, again reflecting changed market dynamics and the continued impact of geopolitics:

- Airports in 20 national markets have still not recovered their pre-pandemic levels, including war-affected Ukraine (-100%) and Israel (-38.9%), along with Finland (-24.9%) and Sweden (-23.1%).

- At the other end of the spectrum, a number of fast-emerging aviation markets far exceeded their pre-pandemic levels – with Albania (+220.8%) and Uzbekistan (+185.9%) in the lead, followed by Kazakhstan (+74.7%), Kosovo (+72.1%), Armenia (+66.3%) and Azerbaijan (+59.9%).

- Amongst the largest aviation markets, Türkiye (+23.1%), Italy (+17.0%) and Spain (+13.0%) were well above their pre-pandemic levels – unlike the UK (-0.1%), France (-3.0%) and Germany (-16.6%).

- Meanwhile, in the EU+ market, the best performances came from Iceland (+24.2%), Malta (+22.5%), Greece and Poland (+22.1%), Portugal (+17.0%) and Croatia (+16.6%).

TOP 5 AIRPORTS BY PASSENGER VOLUME

London Heathrow retained its position as Europe's busiest airport in 2024, welcoming **83.9 million passengers**. This represented an increase of +5.9% over the previous year, allowing the British hub to surpass its pre-pandemic (2019) levels by +3.7%.

Istanbul came second with **80.1 million passengers**. While its growth somewhat moderated in 2024 (+5.3%) compared to the preceding year due to engine maintenance issues at its hub carrier, the Turkish hub's passenger traffic stood at an impressive +16.9% above its pre-pandemic (2019) levels.

Paris Charles de Gaulle held the third position with **70.3 million passengers**. The French hub faced headwinds with the Olympic Games limiting traffic growth at +4.3% over 2023 – and remained at -7.7% below pre-pandemic (2019) levels.

Amsterdam Schiphol welcomed **66.8 million passengers** thanks to a +8% increase over 2023, remaining at -6.8% below its pre-pandemic (2019) level.

The Dutch hub was closely followed by **Madrid** taking the 5th position with **66.1 million passengers** – a +9.9% increase over 2023 and also +7.2% above its pre-pandemic (2019) volumes.

Aside from these top 5 airports, **Rome Fiumicino**'s performance is worth noting, with passenger traffic increasing by +20.7% over 2023 – and +12.3% over its pre-pandemic (2019) volumes.

BEST PERFORMANCES AT MEGA AIRPORTS (25 to 40 million passengers)

While passenger traffic in 2024 at **the Majors** (over 40 million passengers) stood just slightly above their pre-pandemic (2019) level at **+0.6%**, **Mega airports** fared better at **+4%**.

The best performances in that segment came from **Athens** (+13.1% vs. 2023 | +24.5% vs. 2019), **Munich** (+12.2% vs. 2023 | -13.3% vs. 2019), **Istanbul Sabiha Gokcen** (+11.8% vs. 2023 | +17% vs. 2019), **Copenhagen** (+11.7% vs. 2023 | -1.1% vs. 2019) and **Milan Malpensa** (+10.9% vs. 2023 | +0.2% vs. 2019).

LEISURE & VFR DRIVEN AIRPORTS AND LCC BASES OUTPERFOMING

Amongst **large and medium airports** (1 to 25 million passengers), those serving popular tourism destinations and relying on VFR demand generally posted the best performances – including: **Samarkand** (+36.6% vs. 2023 | +186% vs. 2019), **Olbia** (+18.4% vs. 2023 | +31% vs. 2019), **Heraklion** (+18% vs. 2023 | +18.2% vs. 2019), **Krakow** (+17.8% vs. 2023 | +31.7% vs. 2019), **Alicante** (+16.8% vs. 2023 | +22.2% vs. 2019), **Wroclaw** (+15% vs. 2023 | +27.6% vs. 2019), **Catania** (+15% vs. 2023 | +20.8% vs. 2019) and **Malaga** (+11.6% vs. 2023 | +25.6% vs. 2019).

The largest continental Low Cost Carrier bases also kept outperforming: **Beauvais** (+15.7% vs. 2013 | +64.6% vs. 2019), **Memmingen** (+14.8% vs. 2023 | +88.6% vs. 2019), **Charleroi** (+11.8.% vs. 2023 | +27.7% vs. 2019) and **Bergamo** (+8.6% vs. 2023 | +25.2% vs. 2019).

SMALL AIRPORTS UNDERPERFORMING

Meanwhile, passenger traffic at **small airports** (less than 1 million passengers) in 2024 grew at the slowest pace (+5%) amongst the different segments of the airport industry – and remained a staggering -**34.5%** below their pre-pandemic (2019) volumes.

These small airports provide connectivity and territorial cohesion across the breadth of Europe. Yet, structural market changes and regulatory developments are hindering their recovery. These are important considerations in relation to the forthcoming review of EU State aid rules.

FREIGHT AND AIRCRAFT MOVEMENTS

Freight traffic across the European airport network increased dynamically in 2024 at +**13.2%** over the previous year – with EU+ airports growing by +**12.4%** and non-EU+ airports by +**18.4%**.

The **top 5 European airports for freight traffic** were: **Istanbul** (1.97 million tons | 39.6%) replaced **Frankfurt** (1.95 million tons | -2.5%) as the busiest European airport for freight. The German hub was followed by **Paris CDG** (1.87 million tons | -1.3%), **London Heathrow** (1.53 million tons | -

3.2%), **Amsterdam Schiphol** (1.49 million tons | -5%) and **Liège** (1.15 million tons | +28%).

Overall, freight traffic stood at **+11.8%** when compared to pre-pandemic (2019) volumes.

Aircraft movements in Europe were up by +5.1% in 2024 compared to the previous year, but still –3.3% below their pre-pandemic (2019) levels.

DATA BY AIRPORT GROUPS

During 2024, airports welcoming more than 40 million passengers (Majors), airports welcoming between 25 and 40 million passengers (Mega), airports welcoming between 10 and 25 million passengers (Large), airports welcoming between 1 and 10 million passengers (Medium) and airports welcoming less than 1 million passengers (Small) reported an average change of +7.6.%, +8.2%, -5.3%, +8.5% and +5% as compared to the preceding year.[5]

The airports that reported the best performance in passenger traffic for the Full Year 2024 compared to the preceding year are as follows:

- **Majors** (Over 40 million passengers): Rome FCO (**+20.7%**), Barcelona (**+10.3%**), Madrid (**+9.9%**), Amsterdam (**+8.0%**), London LHR (**+5.9%**).
- **Mega** airports (25-40 million passengers): Athens (**+13.1%**), Munich (**+12.2%**), Istanbul SAW (**+11.8%**), Copenhagen (**+11.7%**), Milan MXP (**+10.9%**).
- **Large** airports (10-25 million passengers): Budapest (**+19.6%**), Prague (**+18.3%**), Alicante (+16.8%), Warsaw WAW (**+15.1%**), Catania (**+15.0%**).
- **Medium** airports (1-10 million passengers): Tirana (**+47.5%**), Chisinau (**+46.0%**), Samarkand (**+36.6%**), Sarajevo (**+33.8%**); Baku (**+30.7%**).
- **Small** airports (Below 1 million passengers): Mora (**+344.9%**), Karlovy Vary (**+175.0%**), Kasos (**+161.1%**), Bacau (**+135.9%**), Savonlinna (**+124.4%**).

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[1] All figures are subject to revision. The preliminary report is based on data from approximately 450 airports. With more than 600 airport members, and more than 700 airports in Europe, the traffic figures will be revised in future data releases.

[2] Airport passengers is the sum of arriving and departing passengers. Thus a passenger is counted at the airport of departure and separately at the airport of arrival, as both airports welcome the passenger.

[3] EU, EEA, Switzerland and the UK.

[4] Albania, Armenia, Belarus, Bosnia & Herzegovina, Georgia, Israel, Kazakhstan, Kosovo, North Macedonia, Moldova, Montenegro, Russia, Serbia, Turkey, Ukraine, and Uzbekistan.

[5] Each airport is assigned to the Size Group Category based on its traffic volumes in 2023.

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