AIRPORTS COUNCIL INTERNATIONAL

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Passenger traffic increases by +6.9% in January

Brussels, 13 March 2025: European airport trade body, ACI EUROPE today released its traffic report for January 2025 — the first indication of air traffic performance in Europe for this year.

Passenger traffic across the European airport network increased by **+6.9% in January when compared to the same month last year**. This is broadly aligned with the annual performance registered throughout 2024 (+7.4%) and reflects continued resilience in demand — for now.

Airports in the **non-EU+ market** outperformed the January 2025 headline figures with double-digit growth year-on-year (**+11.4%**), whereas those in the **EU+ market** reported a more modest but still dynamic growth of **+6.0%**.

As was the case in 2024, the gains are markedly driven by international passenger traffic (+8.3%), with domestic passengers increasing by just +2.7% and remaining -12.5% versus pre-pandemic (2019) levels — a reflection of structural aviation market changes.

NATIONAL MARKETS KEEP DIVERGING

In the EU+ market, several countries achieved double-digit passenger traffic growth in January over the same month last year, including Hungary (+16.5%), Slovakia (+14.4%), Croatia (+13.8%), Czechia (+13.8%), Poland (+13.1%), Denmark (+13.0%), and Greece (+11.4%). At the other end of the spectrum, markets which significantly underperformed the industry average included Germany (+2.1%), Ireland (+1.5%), Sweden (-1.7%), and Slovenia (-3.4%) where a mix of economic weakness, internal market struggles, aviation taxes and, in the case of Ireland, the ongoing impact of the passenger cap at Dublin Airport, continue to hamper traffic gains. This negative trend is set to expand to other countries, where aviation taxation is deterring passengers from traveling, with the most recent example coming from France.

Non-EU+ countries with the highest passenger traffic increases when compared to January 2024 were Israel (+77.7%), Moldova (+62.0%), Bosnia and Herzegovina (+50.1%), Uzbekistan (+23.0%), Kosovo (+19.6%), Georgia (+12.8%), Albania (+11.9%) and Azerbaijan (+10.4%). While the dynamic revival of passenger traffic in Israel is linked to the ceasefire, volumes still remain well below their pre-pandemic levels (-42.3% vs. January 2019).

Conversely, Montenegro (-0.1%), Serbia (-2.1%), North Macedonia (-9.1%), and Russia (-9.9%) are reporting notable decreases, while Ukraine’s airports remain shuttered for all commercial traffic due to the ongoing war.

MAJORS TOPPED BY ISTANBUL

The Majors (airports over 40 million passengers) collectively grew their passenger traffic by +7.0% in January compared to the same month last year. **Istanbul** came out on top in absolute terms, serving 6.4 million passengers (+7.1% vs. January 2024).

London-Heathrow took the second place with 6.3 million passengers (+5.3% vs. January 2024), followed by **Paris-CDG** with 5.3 million passengers (+10.5% vs. January 2024).

Madrid (5.2 million passengers, +8.3% vs. January 2024) and **Amsterdam** (4.8 million passengers, +5.7% vs. January 2024) closed off the top 5 with fourth and fifth place respectively.

When looking at percentage increases, **Istanbul Sabiha Gökcen** (+16.2%) and **Rome Fiumicino** (+11.3%) grew the fastest in January 2025 when compared to January 2024.

BEST PERFORMANCES AT MEGA AIRPORTS

Airports with annual traffic between 25 and 40 million passengers (Mega airports) reported +6.1% growth when compared to the same month last year.

The best performances in that segment came from **Milan Malpensa** (+14.9%), **Athens** (+14.5%), **Copenhagen** (+13.9%), **Oslo** (+9.4%) and **Manchester** (+8.5%). **Lisbon** welcomed the highest number of passengers in absolute terms — 2.4 million — reporting an impressive +22.1% growth above its pre-pandemic volumes.

SOUTH-EAST AXIS OUTPERFORMS

Amongst large and medium airports (1 to 25 million passengers), those serving tourism destinations in the South and those relying on Visiting Friends and Relatives (VFR) demand in the East generally posted the best performances — including: **Tel Aviv** (+83.2%), **Chișinău** (+62.0%), **Sarajevo** (+50.1%), **Trieste** (+43.1%), **Girona** (+37.5%), **Poznan** (+33.2%), **Budapest** (+17.5%), **Krakow** (+15.1%), **Prague** (+14.1%), and **Izmir** (+13.9%).

The largest continental Low Cost Carrier bases also kept growing: **Memmingen** (+13.7%), **Beauvais** (+7.0%), and **Charleroi** (+4.7%), with the exception of **Bergamo** (-8.6%).

SMALL AIRPORTS STILL BEHIND PRE-COVID RESULTS

Regional and small airports (under 1 million passengers) delivered the most contrasted results in January, achieving an impressive +19.7% growth in passenger traffic when compared to the same month last year — but still faring the worst when compared to pre-pandemic (2019) volumes (-31.9%). Their continued fragility in the new aviation market dynamics is also laid bare in the percent of fully recovered airports within their traffic category. For small airports, less than half managed to fully turn the corner on the impact of the COVID-19 pandemic (46%).

FREIGHT AND MOVEMENTS

January 2025 was a slow month for freight traffic at Europe's airports, with a decrease of -9.1% over the same month last year. Amongst the top 10 European airports for freight traffic only 4 posted gains year-on-year: **Madrid** (+6.9%), **Cologne** (+4.2%), **Liège** (+2.8%) and **London-Heathrow** (+0.5%). In absolute terms, Frankfurt, Istanbul and London-Heathrow airports shifted the biggest volumes of freight in January.

Aircraft movements were up +4.6% when compared to January 2024, at the same time still registering in the negatives compared to pre-pandemic (2019) levels at -7.9%.

DATA BY AIRPORT GROUPS

In January, 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 +7.0%, +6.1%, +7.9%, +4.6% and +19.7% as compared to the preceding year.

The airports that reported the most dynamic growth in passenger traffic versus January 2024 are as follows:

Majors: Istanbul SAW (+16.2%), Rome FCO (+11.3%), Paris CDG (+10.5%), Madrid MAD (+8.3%), London LGW (+7.8%).

Mega airports: Milan MXP (+14.9%), Athens ATH (+14.5%), Copenhagen CPH (+13.9%), Oslo OSL (+9.4%), Manchester MAN (+8.5%).

Large airports: Tel-Aviv TLV (+83.2%), Budapest BUD (+17.5%), Krakow KRK (+15.1%) Prague PRG (+14.1%), Izmir ADB (+13.9%).

Medium airports: Chișinău RMO (+62%), Sarajevo SJJ (+50.1%), Trieste TRS (+43.1%), Girona GRO (+37.5%), Poznan POZ (+33.2%).

Small airports: Antakya HTY (+335.4%), Bucharest BBU (+253.2%), Rodez RDZ (+216.6%), Yüksekova YKO (+216.4%), Oradea OMR (+111.3%).

ENDS

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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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About ACI EUROPE

ACI EUROPE is the European region of Airports Council International (ACI), the only worldwide professional association of airport operators. ACI EUROPE represents over 600 airports in 55 countries. Our members facilitate over 95% 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.