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AIRPORTS COUNCIL INTERNATIONAL

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FOR IMMEDIATE RELEASE

Passenger traffic up +3.6% in September year-on-year

Brussels, 6 November 2025: European airport trade body ACI EUROPE today released its preliminary air traffic report for September and the third quarter of 2025, showing continued passenger growth across the continent.

Passenger traffic across the European airport network increased **+3.6%** in **September 2025** compared with the same month last year.

Growth in in the non-EU+ area[1] (+8.3%) was more than double the continental average and over five percentage points higher than in the more mature EU+ market[2] (+2.7%). International passenger traffic (+4.3%) continued to expand faster than domestic demand (+1%).

For the whole third quarter, which covers the peak summer travel months, passenger traffic expanded by +3.9%. This trails the +4.5% and +4.6% registered in Q1 and Q2 respectively.

Olivier Jankovec, Director General of ACI EUROPE commented: *"September once again confirmed the overall resilience of passenger traffic, cementing the momentum seen throughout the Summer. This came despite the persistence of a generally low-growth economic environment, but with inflation pressures and unemployment somehow easing a bit. Disparities in traffic performance continue to reflect a combination of factors. These include structural changes in the aviation market, varying levels of market maturity and intensifying airport competition along with punitive taxation and economic divergences across countries - notably in the case of France and Germany."*

COUNTRY RANKINGS

The fastest-growing countries in the **EU+ market** were Slovakia (+14.7%), Poland (+13.2%), Slovenia (+13.1%), Romania (+11.1%), and Malta (+10.5%). In contrast, several markets recorded declines, including: Estonia (-5.8%), Latvia (-5.1%), Iceland (-4.9%), France (-1%) and the UK (-0.3%).

Among the largest EU+ markets (beyond France and the UK), Germany achieved the highest growth with traffic up by +3.2%. Spain (+2.5%) and Italy (+1.7%) also posted gains, though both underperformed the continental average.

Meanwhile, airports in the rest of Europe were buoyed by exceptional growth including in Moldova (+45.5%), Israel (+32.2%), Bosnia & Herzegovina (+18%), Georgia (+15.6%), Uzbekistan (+15%), Montenegro (+10.9%), and Türkiye (+10.6%).

AIRPORT MARKET SEGMENTS

Major airports (over 40 million passengers) grew by **+2.8%** in September 2025 compared to the same month in 2024.

Istanbul Sabiha Gökçen (+28.1%) was Europe's fastest-growing major airport, followed by Munich (+6.7%) and Istanbul (+5%).

Istanbul Airport also handled the highest passenger volume among Europe's major hubs, ahead of London-Heathrow and Paris-CDG. The French gateway was the only one in this category to post a decline, down -1.3%.

Mega airports (25–40 million passengers) saw passenger volumes rise by **+3.0%**, led by strong results at Copenhagen (+9.5%), Athens (+5.5%) and Milan Malpensa (+4.7%).

Large airports (10–25 million passengers) registered a **+4.6%** increase in passenger traffic. The fastest growth came from Tel Aviv (+32.2), Ankara (+18.5%) and İzmir (+18%).

Medium airports (1–10 million passengers) expanded by **+3.6%**, driven by impressive gains at Chișinău (+45.5%), Wrocław (+25.1%) and Tivat (+24.2%).

Finally, **Small airports** (under 1 million passengers) reported the strongest overall growth at **+7.8%**. Despite this positive momentum, they remained the only segment yet to fully recover pre-pandemic passenger levels (**-21.7%** compared to 2019).

FREIGHT AND AIRCRAFT MOVEMENTS

Freight traffic across the European airport network grew by **+4.3%** in September and now stands +17.6% above pre-pandemic levels.

Among the top 10 European airports for freight traffic, the strongest gains came from Liège (+14.3%), Madrid (+9.4%), and Cologne (+2.6%).

Aircraft movements increased by **+2.5%** compared with the same period last year.

DATA BY AIRPORT GROUPS

The airports that reported the most dynamic growth in passenger traffic in September 2025 versus September 2024 are as follows:

Majors: Istanbul SAW (+28.1%), Munich MUC (+6.7%), Istanbul IST (+5.0%), Barcelona BCN (+4.3%), Rome FCO (+2.4%).

Mega airports: Copenhagen CPH (+9.5%), Athens ATH (+5.5%), Milan MXP (+4.7%), Antalya AYT (+4.2%), Dublin DUB (+3.7%).

Large airports: Tel Aviv TLV (+32.2%), Ankara ESB (+18.5%), Izmir ADB (+18.0%), Krakow KRK (+16.8%), Warsaw WAW (+12.3%).

Medium airports: Chișinău RMO (+45.5%), Wroclaw WRO (+25.1%), Tivat TIV (+24.2%), Bournemouth BOH (+21.5%), Trieste TRS (+20.0%).

Small airports: Antwerp ANR (+2209.5%), Hatay HTY (+158.6%), Bucharest BBU (+136.7%), Ordu–Giresun OGU (+128.4%), Ağrı AJI (+103.1%).

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

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

ENDS

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.

The monthly figures will be revised as more airports submit data. The preliminary report is based on a sample of around 450 airports, who submit data within 4 weeks of month end. The definitive report is based on data from 650 airports.

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: natalia.sirbu@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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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.