Airports report 4.9% traffic growth during tumultuous first half of 2016

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Brussels, 9 August 2016: European airport trade body, ACI EUROPE today released its airport traffic report for June, Q2 and the first half of 2016. The report is the only air transport report, which includes all types of civil aviation passenger flights: full service, low cost and charter. It reveals that during the first half of this year, passenger traffic at Europe's airports grew by an average **+4.9%.**

More specifically, **passenger traffic** in the **EU** during H1 (the first half of the year) grew by a robust **+6.2%**. Growth dynamics varied between EU countries, with the core markets of France, Germany and Italy underperforming the EU average while Bulgaria, Cyprus, Denmark, Hungary, Ireland, Lithuania, Luxembourg, Malta, Portugal, Romania and Spain all achieved double digit growth. However, the pace of growth diminished between the first and the second quarter from **+8.2%** to **+4.8%**. This affected almost all EU markets – and especially Belgium in the wake of the Brussels terrorist attacks.

A large part of that growth was concentrated on **secondary hubs & large to mid-sized airports**, such as Berlin-Schonefeld (+39.4%), Cologne-Bonn (+19.8%), Bucharest (+16.5%), Dublin (+13.4%), Barcelona (+12.7%), Birmingham (+12.6%), Budapest (+11.9%) and Copenhagen (+10.9%). Meanwhile, among the **Top 5 busiest EU airports**, traffic growth at London-Heathrow, Paris CDG and Frankfurt stalled, while Amsterdam-Schiphol (+9.9%) and Madrid (+8.6%) reported impressive increases. This generally reflects the fact that Low Cost Carriers remain the main drivers of traffic expansion for EU airports, as well as airport capacity constraints.

SHIFT IN LEISURE MARKET BENEFITING SOME EU AIRPORTS

EU airports serving leisure destinations also fared very well, benefitting from demand shifting away from North Africa and Turkey. This was the case in particular of Bourgas (+25.2%), Varna (+24.3%), Larnaca (+20.8%), Faro (+18.6%), Santorini (+17.9%), Ibiza (+17%), Alicante (+16.1%), Dubrovnik (+15.2%), Malaga (+14.6%), Funchal (+14%), Chania (+14.5%), Gran Canaria (+14.2%), Palma de Mallorca (+11.2%) and Malta (+10.2%).

NON-EU GROWTH TELLS A DIFFERENT STORY

Conversely, passenger traffic in the **non-EU bloc was almost flat** at **+0.5%**, dragged down by significant losses in Turkey and Russia**.** These losses materialised in the second quarter, bringing down non-EU passenger traffic by **-3.2%**, and worsening in June to **-6.9%**.

Meanwhile, Iceland reported unprecedented growth - with Keflavik airport seeing passenger traffic increasing by +34.3% - followed by FYROM, Moldova, Ukraine and Israel.

Freight traffic across the European airport network in H1 increased by just **+2.1%**. EU airports posted a +3.2% increase, with a significant jump in June (+6.4%) while Non-EU airports posted a −3.9% decrease over the same period and a dramatic fall in June (-13.5%). **Aircraft movements** were up **+3.1%**.

Olivier Jankovec, Director General ACI EUROPE commented "*Beyond an overall healthy traffic performance at pan-European level for the first 6*

months of the year, these figures reveal a severe slump in passenger demand in the Non-EU bloc affecting mainly Turkey and Russia – as well as a significant growth deceleration in the EU market. In both cases, these worrying trends are due to the impact of terrorism and accrued geopolitical instability. Since these traffic figures do not yet reflect the full impact of the Istanbul-Atatürk airport terrorist attack and the failed coup in Turkey, we expect a further worsening of airport traffic performance over the summer and for the remainder of the year. EU airports are also likely to see a continued softening of passenger traffic on the back of lower consumer confidence fuelled by terrorism and the decision of the UK to leave the EU, as well as major full service airlines reining in capacity. The only positive remains the price of oil – which should help limit the extent of capacity cuts and keep low cost carriers in expansion mode".

During the first 6 months of the year (H1), airports welcoming more than 25 million passengers per year (Group 1), airports welcoming between 10 and 25 million passengers (Group 2), airports welcoming between 5 and 10 million passengers (Group 3) and airports welcoming less than 5 million passengers per year (Group 4) reported an average adjustment **+3.3%**, **+5.4%**, **+9.7%** and **+5.8%**.

The airports which reported the highest increases in passenger traffic during **H1** are as follows:

GROUP 1:   Dublin (**+13.4%**), Barcelona (**+12.7%**), Istanbul SAW (**+12.0%**), Copenhagen (**+10.9%**) and Amsterdam (**+9.9%**)

GROUP 2:   Cologne-Bonn (**+19.8%**), Alicante (**+16.1%**), Malaga (**+14.6%**), Gran Canaria (**+14.2%**) and Birmingham (**+12.6%**)

GROUP 3:   Berlin SXF (**+39.4%**), Larnaca (**+20.8%**), Faro (**+18.5%**), Ibiza (**+17.0%**) and Bucharest OTP (**+16.5%**)

GROUP 4:   Oradea (**+283.4%**), Liege (+**170.9%**), Ostend (**+127.5%**), Iasi (**+115.2%**) and Ohrid (**+82.7%**)

JUNE FIGURES

During the month of **June**, average passenger growth was **+2.3%**, with EU airport traffic growth (**+5.1%**) counterbalancing losses at Non-EU airports (**-6.9%**). Meanwhile, freight reported an increase of **+1.7%** and movements were up **+1.4%**.

Airports welcoming more than 25 million passengers per year (Group 1), airports welcoming between 10 and 25 million passengers (Group 2), airports welcoming between 5 and 10 million passengers (Group 3) and airports welcoming less than 5 million passengers per year (Group 4) reported an average adjustment **-1.1%**, **+4.6%**, **+8.2%** and **+2.8%**.

For June, the airports which reported the highest increases in passenger traffic are as follows:

GROUP 1:   Barcelona (**+10.0%**), Dublin (**+9.6%**), Copenhagen (**+8.9%**), London LGW (**+8.5%**) and Amsterdam (**+7.9%**)

GROUP 2:   Gran Canaria (**+22.3%**), Alicante (**+15.8%**), Malaga (+**14.2%**), Birmingham (**+13.2%**) and Cologne-Bonn (**+12.5%**)

GROUP 3:   Berlin SXF (**+31.8%**), Larnaca (**+22.9%**), Tenerife TFS (**+18.6%**), Kiev (**+16.5%**) and Faro (**+16.3%**)

GROUP 4:   Oradea (**+3,266.7%**), Bucharest BBU (**+213.7%**), Iasi (**+111.0%**), Palanga (**+68.3%**) and Chambery (+**55.3%**)

The '**ACI EUROPE Airport Traffic Report – June, Q2 & H1 2016'**
includes 215 airports in total representing more than 88% of European air
passenger traffic.

ENDS

Notes for Editors

An additional 2,720 extra flights up to the 30 June took place in France, due to the Euro 2016
football tournament taking place there.

Further the terrorist attack at IST on 28 June, Turkish Airlines cancelled 337 flights.

The ACI EUROPE Airport Traffic Report is a dedicated service for journalists available in the
password protected 'Airport Traffic Report' section of the 'Media room' on our website
www.aci-europe.org. Accredited members of the media may also access additional traffic
analysis and comprehensive traffic databases. For your password to access these sections,
please contact us by e-mail at: **maria.karananou@aci-europe.org**. Your request will be
validated and the password will be e-mailed to your work address.

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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 45 European countries. In 2014, our member airports handled over
90% of commercial air traffic in Europe, welcoming more than **1.8 billion
passengers**, **18.4 million tonnes of freight** and **21.2 million aircraft
movements**. These airports contribute to the employment of **12.3 million people**,
generating **€675 billion each year** (**4.1%**) **of GDP** in Europe.*

EVERY FLIGHT BEGINS AT THE AIRPORT.