EU airports report strong Q3 traffic growth, with freight rebounding

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Brussels, 7 November 2016: European airport trade association, ACI EUROPE today releases its traffic report for **September and Q3 2016**. This is the only air transport report which includes all types of airline passenger flights to and from Europe: full service, low cost, charter and others.

Passenger traffic across the European airport network during the peak summer months - **Q3**, reported an average increase of **+3.5%.**

This growth was entirely attributable to the **EU market**, with airports in the bloc reporting growth of **+6.1%.** The EU passenger traffic dynamic was mainly driven by Southern & Eastern Europe, with Bulgaria, Croatia, Cyprus, Greece, Lithuania, Poland, Romania and Spain strongly outperforming the EU average - along with Denmark, Ireland and the Netherlands.

Meanwhile, the **non-EU market** saw passenger traffic dropping by **-4.7%**, dragged down by Turkey, Russia and to a lesser extent Norway. Apart from Ukraine which saw a notable improvement, smaller markets including Iceland, Israel, Bosnia Herzegovina and Montenegro were very dynamic throughout the summer.

Freight traffic across the European airport network in **Q3** grew by **+4.1%**, with a surprising surge in September delivering most of the gains (+7.9%) – including at non-EU airports. The September figure is the highest monthly increase in freight traffic in over 5 years.*

Aircraft movements – an indicator of airline capacity - were up +**2.8%.**

Olivier Jankovec, Director General ACI EUROPE commented "*This has been a rather contrasted summer with geopolitical events and terrorism in particular shaping traffic performance at Europe's airports. The shift in passenger demand towards leisure markets perceived as being safer has been significant. However, September has revealed some improvement for Turkish airports – while traffic prospects for Russian airports also seem to be getting better.*"

He added "*Aside from these external factors, low cost airlines have been the primary driver of passenger traffic in the EU - on the back of their continued capacity expansion and move upmarket in search of higher yields. As a result, most of the growth over the peak summer months has taken place at airports welcoming between 5 and 25 million passengers per annum. Small regional airports grew at a much slower pace – and even more revealing, collectively the passenger volumes remained flat** at Europe's 5 biggest hubs.*"

"*Last week's announcement of Ryanair setting up a base at Frankfurt airport undoubtedly marks a turning point for European air travel. Along with long haul low cost, these disruptive forces are pointing towards increasing airport competition and a more hybrid airport market. The traditional segmentation between mega hubs, secondary hubs, medium-sized airports and smaller regional airports is blurring.*"

Q3 - BREAKDOWN BY TRAFFIC CATEGORY & TOP 5s

During **Q3**, 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 **0.0%**, **+6.2%**, **+9.9%** and **+3.3%**.

The airports which reported the highest increases in passenger traffic during Q3 2016 (compared with Q3 2015) are as follows:

GROUP 1:   Dublin (**+9.7%**), Barcelona (**+8.7%**), Copenhagen (**+8.0%**), Amsterdam (**+7.7%**) and London LGW (**+6.5%**)

GROUP 2:   Gran Canaria (**+18.0%**), Alicante (**+16.6%**), Malaga (**+14.5%**), Cologne-Bonn (**+14.4%**) and Birmingham (**+14.3%**)

GROUP 3:   Berlin SXF (**+42.9%**), Larnaca (+**22.5%**), Tenerife TFS (**+21.5%**), Kiev (**+18.6%**) and Bucharest (**+17.4%**)

GROUP 4:   Iasi (**+161.6%**), Palanga (+**61.4%**), Kharkiv (+**57.8%**) Keflavik (+**37.8%**) and Lublin (**+35.2%**)

SEPTEMBER RESULTS

During the month of **September**, 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 **+1.4%**, **+7.1%**, **+10.8%** and **+5.9%**.

The airports which reported the highest increases in passenger traffic during September 2016 (compared with September 2015) are as follows:

GROUP 1:   Dublin (**+10.8%**), Barcelona (**+9.8%**), Moscow SVO (**+8.4%**), Copenhagen (**+7.7%**) and Amsterdam (**+7.4%**)

GROUP 2:   Alicante (**+18.2%**), Gran Canaria (**+16.4%**), Malaga and Birmingham (**+15.9%**), Warsaw WAW (**+14.9%**) and Athens (**+14.7%**)

GROUP 3:   Berlin SXF (**+44.4%**), Larnaca (+**24.8%**), Tenerife TFS (**+20.6%**), Bucharest OTP (**+19.3%**) and Kiev (**+18.1%**)

GROUP 4:   Oradea (**+6,189.5%**), Iasi (**+151.0%**), Palanga (+**69.4%**), Kharkiv (+**57.5%**) and Batumi (**+52.5%**)

The '**ACI EUROPE Airport Traffic Report – September & Q3 2016'** includes 234 airports in total representing more than 88% of European air passenger traffic.

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Notes to Editors

* The last time freight growth at Europe's airports surpassed +7.9% was May 2011.
** London-Heathrow, Paris Charles de Gaulle, Istanbul-Atatürk, Frankfurt and Amsterdam Airport Schiphol collectively reported a +0.1% increase in passenger traffic during Q3.

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 2015, our member airports handled over 90% of commercial air traffic in Europe, welcoming more than **1.9 billion passengers**, **18.9 million tonnes of freight** and **22.8 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.