AIRPORTS COUNCIL INTERNATIONAL

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First half of 2019 yields uncertain outlook for air transport in Europe

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Brussels, 8 August 2019: European airport trade body, ACI EUROPE, today released its air traffic report for June, Q2 & **H1**, measuring all types of civil aviation passenger flights: full service, low cost and charter.

The report reveals that **passenger traffic** at Europe's airports grew by **+4.3%** during the first half of this year – a significantly slower rate than last year (+6.7%). Meanwhile, **freight traffic** dropped by **-3.5%** over the same period (+3.3% in H1 2018). Overall, **aircraft movements** increased by **+2.4%** (+3.5% in H1 2018).

Olivier Jankovec, Director General of ACI EUROPE commented: "*Passenger traffic growth has certainly slowed this year compared to previous ones, but it still remains quite resilient – especially given the range of economic, geopolitical and other industry-specific challenges we are confronted with. Slowing economic growth in Europe, trade wars and Brexit are not helping – and neither are rising fuel bills, ATM disruptions, airline consolidation and aircraft grounding & delivery delays. Aircraft movements have been continuously slowing down - from +6.2% last December to just +1.6% in June. This shows just how risk averse airlines have become in terms of capacity deployment & network development.*"

He added *"The slump in freight traffic is where it really bites at the moment. And it is not getting any better, with June registering a drop of -7.1% - the worst monthly performance in more than 7 years. This does not bode well for the months ahead, especially as passenger traffic usually does not remain totally isolated from trends in freight traffic."*

EU AIRPORTS PASSENGER TRAFFIC IN THE LEAD AT +4.7%

The EU market maintained steady growth during H1, with passenger traffic performance holding steady between 4.5% to 5% on a month-by-month basis over the period.

Airports in Austria (+20%), Croatia (+10.5%) and Estonia (+10.5%) posted double-digit growth in H1, with those on Luxembourg, Portugal, Spain, Latvia, Poland, Hungary and Romania also growing well above the EU average. Conversely, Bulgaria (-2.5%) and Sweden (-4.1%) reported passenger traffic declining while growth was flat in neighbouring Denmark (+0.3%). Belgium, the Netherlands, Slovenia and the UK significantly underperformed the EU average – with the latter further slowing down in June (+0.9%).

Accordingly, amongst larger/capital EU airports, the best results were achieved by Berlin TXL (+25.2%), Vienna (+23.9%), Tallinn (+10.5%), Dusseldorf (+10.4%), Milan Malpensa (+10.2%), London Luton (+9.6%), Riga (+9.5%) Luxembourg (+9.0%), Bucharest Otopeni (+8.2%), London City (+7.8%), Athens (+7.7%), Budapest (+7.5%) and Warsaw (+7.4%).

NON-EU AIRPORTS PASSENGER TRAFFIC AT +2.9%

Airports in the non-EU market grew at a slower pace in H1, mainly due to traffic losses in Turkey (-1.4% - as a result of the recession affecting the country) and Iceland (-20.3% - following the bankruptcy of WOW in the final days of March) as well as nearly flat growth in Norway (+0.9%).

CONTINUED ON PAGE 2

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However, passenger traffic in Ukraine, Georgia, Albania and Northern Macedonia remained extremely dynamic, achieving double-digit growth. It is also worth noting that passenger traffic in Turkey improved in Q2 and ended up posting an impressive +7.1% growth in June - signaling a recovery.

The best performances amongst larger/capital non-EU airports came from Kyiv-Boryspil (+20.1%), Moscow-Sheremetevo (+14.1%), Moscow-Vnukovo (+13.8%), Antalya (+13.4%), Pristina (+12.5%), Tbilisi (+11.7%), Tirana (+11.1%), and Saint Petersburg (+10.3%).

MAJORS & SMALLER REGIONALS WEAKER

Passenger traffic at **the Majors** (top 5 European airports) grew by just **+2.3%** during H1. Paris CDG (+7.2%), led the league, followed by Frankfurt (+3.0%), while gains were limited at capacity constrained London-Heathrow (+1.7%) and Amsterdam-Schiphol (+1.4%). Istanbul-IST/ISL[1] saw passenger traffic receding (-2%).

Many **larger regional airports** achieved double-digit passenger traffic growth in H1, including Seville (+21.4%), Krakow (+19.3%), Nantes (+18.3%), Bari (+13%), Valencia (+12.3%), Bordeaux (+12%), Naples (+10.8%), Bologna (+10.3%), Sochi (+10.2%) and Porto (+10%).

However, **smaller regional airports** significantly underperformed, with their passenger traffic barely increasing at **+1%**. Yet, some managed to post impressive growth, such as Ohrid (+62.9%), Zadar (+37.6%), Batumi (+30%), Newquay (+29.4%), Kharkiv (+25.5%), Memmingerberg (+25.4%), Sibiu (+25%), Dubrovnik (+17.4%), Iasi (+16.8%), Brno (+17.7%) and Ostend (+15.4%), Kaunas (+15.1%) and Brest (+13.9%).

FREIGHT & AIRCRAFT MOVEMENTS

Both the EU and Non-EU markets saw a decline in **freight traffic** during H1 with the **EU market** (-3.7%) bearing the brunt - **non-EU** airports (-1.9%).

Amongst the **top 10 European airports for freight traffic**, only 2 posted positive results in H1: Liège (+6.5%) and Istanbul IST (+0.4%).

Aircraft movements in H1 increased by **+2.9%** at EU airports and by 1% at non-EU ones.

H1 TOP 5s

During **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 **+3.9%**, **+6.1%**, **+4.2%** and **+1.9%**.

The airports that reported the highest increases in passenger traffic are as follows:

GROUP 1: Vienna (**+23.9%**), Moscow SVO (**+14.1%**), Antalya AYT (**+13.4%**), Paris CDG (**+7.2%**) and Madrid & Lisbon (**+6.6%**)

GROUP 2: Berlin TXL (+**25.2%**), Kyiv-Boryspil KBP (**+20.1%**), Moscow VKO (**+13.8%**), Dusseldorf (**+10.4%**) and St Petersburg (**+10.3%**)

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GROUP 3: Seville (**+21.4%**), Krakow (**+19.3%**), Nantes (**+18.3%**) Bari (**+13%**) and Valencia (**+12.3%**)

GROUP 4: Ohrid (**+62.9%**), Zadar (**+37.6%**), Batumi (**+30%**), Newquay (**+29.4%**) and Bucharest (+**28.6%**)

The '**ACI EUROPE Airport Traffic Report – June, Q2 & H1 2019'** includes 242 airports in total representing more than 88% of European air passenger traffic.

ENDS

[1] Due to the new Istanbul airport fully taking over passenger traffic from Istanbul-Ataturk on 5 April 2019, the figure reported is based on the passenger traffic handled by Istanbul-Ataturk until and subsequently on the passenger traffic handled by the new Istanbul airport.

ACI EUROPE is empowering you to have better access to our traffic data! We have just released a new, free tool that puts the latest airport traffic data at your fingertips, enabling you to make the customised comparison tables & graphs that can be downloaded and shared via email or social media.

To access our **Airport Traffic Analyser App,** go to **https://www.aci-europe.org/airport-traffic-app.html**

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: **biljana.banjac@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. Our members facilitate over 90% of commercial air traffic in Europe: **2.3 billion passengers**, **21.2 million tonnes of freight** and **25.7 million aircraft movements** in 2018. In response to the Climate Emergency, in June 2019 our members committed to achieve net zero carbon emissions for operations under their control by 2050, without offsetting.*

EVERY FLIGHT BEGINS AT THE AIRPORT.