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Regional airports call on the EU and European countries to address key economic, connectivity & policy challenges

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Dalaman, 29 April 2025: Europe's regional airports and their business partners are meeting today in Dalaman, Türkiye, for ACI EUROPE's annual Regional Airports Conference & Exhibition hosted by YDA Dalaman Airport. The event provides an opportunity to review trading conditions, revealing a multi-speed regional airport market facing existential economic and policy challenges — with ACI EUROPE warning that addressing these challenges will be essential to safeguarding both cohesion and competitiveness.

NEW TRAFFIC REALITIES RESULTING IN UNPRECEDENTED COMPETITIVE PRESSURES

While passenger traffic at larger regional airports¹ stands at **+11.7%** above pre-pandemic levels (2019) and thus outperforms all other segments of the airport industry, volumes have collapsed at smaller regional airports² and still remain **-35.1%** below 2019.

This reflects major structural shifts in the European aviation market, affecting both the demand and supply sides:

- The predominance of leisure and VFR (Visiting Friends & Relatives) demand as well as the retreat of domestic demand vs. international is benefitting those regional airports that serve popular and emerging tourism destinations, but hampering those that traditionally relied on business travel.
- The impressive but selective capacity expansion of Ultra-Low Cost Carriers (LCCs) and the relative retrenchment of Full Service Carriers (FSCs) on their hubs has also widened the traffic gap between larger and smaller regional airports. This Summer, the seat capacity³ deployed by LCCs remains at **-27%** below Summer 2019 for smaller regional airports, but has increased by **+29%** at larger ones. Meanwhile, FSCs are nearly halving their seat capacity at smaller regional airports (**-45%**) and keeping it flat at larger ones (**-0.3%**).

Andrea Andorno, CEO of Torino Airport and Chair of ACI EUROPE's Regional Airports Forum said: *"The post-pandemic market reality is a very harsh one for regional airports — increasingly relying on Low Cost Carriers to achieve any significant growth within the current European scenario. While these airlines have become essential for developing regional air connectivity, supporting tourism diversification, and bringing Europeans together, they are also putting an extraordinary pressure on regional airports to achieve cost reductions."*

FINANCIAL VIABILITY, CONNECTIVITY & POLICY CHALLENGES

These new market realities are making it increasingly difficult for many smaller regional airports to break even. They further exacerbate structural factors that have always weighed on their financial viability — including high fixed costs, lack of economies of scale, and high traffic seasonality. While costs have continued to rise driven by inflationary pressures, airport charges have decreased in real terms since 2019, standing at **-12.1%** for smaller regional airports and **-5.9%** for larger ones.

Olivier Jankovec, Director General of ACI EUROPE commented: *"Looking ahead, these financial challenges are only set to worsen, given the expected impact of EU and UK climate regulations on air fares and demand. Independent studies have shown that smaller regional airports relying on LCCs will be the most affected, with their passenger traffic decreasing by up to -20% by 2050. This will result in much degraded connectivity for our regional communities, directly harming cohesion and territorial equality — and, beyond that, undermining Europe's competitiveness, as regional airports currently account for 35% of Europe's air connectivity."*

Jankovec was adamant this requires an urgent **EU policy reset** focused on 4 key priorities:

1. Safeguarding operating aid for smaller regional airports beyond 2027.

The revision of the **EU Aviation State aid Guidelines** must protect the vital ability of smaller regional airports to keep receiving operating aid beyond 2027. This is a strategic necessity not just for cohesion, but also for preserving the Single Market and advancing the EU's competitiveness agenda.

2. Delivering a robust EU Sustainable Transport Investment Plan.

The forthcoming Plan must deliver an effective EU SAF Industrial policy — including a book & claim mechanism, the earmarking of aviation ETS revenues for decarbonisation, and increased SAF

allowances under ETS — alongside EU financial support for electrification and renewable energy integration at airports.

3. Abolishing national aviation taxes — targeting aviation with sector-specific taxes harms the highly beneficial social and economic contributions of air transport, with research confirming that every 10% increase in connectivity increases GDP per capita 0.5% while also supporting a wide range of social goals.

4. Safeguarding and further developing Open Skies Agreements.

POLICY KEY TO UNLOCKING POTENTIAL OF TÜRKIYE'S REGIONAL AIRPORTS

Finally, Jankovec reiterated ACI EUROPE's call for **Türkiye** to also revise some of its aviation policies in order to preserve and further boost the ability of Turkish regional airports to contribute to the country's **2023 Tourism Strategy** as well as its economic resilience and development. This requires:

- A more liberal approach as regards the ability of foreign airlines to fly into the country. Outdated restrictions on market access and traffic rights should be abolished.
- Allowing airports to reflect inflationary pressures and investment costs into their user charges.

Yiğit LAÇIN, CEO of YDA Dalaman Airport said: *"Regional airports are key drivers of economic growth and improved air connectivity for local regions in Türkiye as well. They not only link major cities but also give underserved areas access to global markets. By supporting commercial activity, promoting tourism, and creating jobs, regional airports add considerable value to local economies."*

He further noted: *However, regional airports face distinct challenges, including high operating costs, difficulty in attracting skilled talent, need for investment in advanced technologies and the air connectivity restrictions. Targeted government support is therefore crucial. With the right backing, regional airports can continue to deliver strong contributions to the broader economy and enhance social welfare."*

¹ Airports welcoming 1 to 10 million passengers (2024)

² Airports welcoming less than 1 million passengers (2024)

³ Data source: Cirium. Analysis was performed based on seat capacity.

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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 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.