AIRPORTS COUNCIL INTERNATIONAL

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Passenger traffic on a steady rebound in the first half of 2023

Brussels, 31 July 2023: European airport trade body ACI EUROPE today released its air traffic report covering the month of June, as well as Quarter 2 (**Q2**) and the first half (**H1**) of 2023.

INTERNATIONAL DEMAND BRINGS PASSENGER VOLUMES CLOSE TO FULL RECOVERY

Passenger traffic across the European airport network increased by **+28.3%** in **H1 2023** compared to the same period last year — with **international traffic (+32.2%)** growing at twice the rate of domestic traffic **(+16.6%)**. The pace of growth eased in **Q2 (+16.3%)** compared to Q1 (+49%), reflecting the fact that COVID-19 restrictions on intra-European travel had largely been lifted as of April last year.

When **compared to pre-pandemic (2019) levels**, passenger volumes stood at **-7.7% in H1** — steadily improving over the period from -11% in January to **-5.9% in June**.

Olivier Jankovec, Director General of ACI EUROPE, commented: "*Passenger traffic has rebounded over the past 6 months, getting ever closer to a full recovery. However, 2023 is not 2019. There are significant variations in performance across national markets, and volumes still remain below their pre-pandemic levels for more than half (52%) of Europe's airports. Apart from the lasting impact of the war in Ukraine on some markets, this is largely due to recovery patterns becoming structural. These include the impressive yet selective expansion of Ultra-Low Cost Carriers and relative retrenchment of Full Service Carriers along with the prominence of leisure and VFR*[1] *demand as well as some domestic traffic shifting to other transport modes*."

"*So far, demand has remained extremely resilient in the face of lasting inflationary pressures and record increases in airfares since the beginning of the year. But, looking ahead and past the peak Summer months, we do see significant downside risks and much uncertainty. These include the prospect of deteriorating macroeconomics for the Eurozone and the UK as well as initial signals that discretionary spending might start decreasing and that pandemic-savings buffers are exhausted*."

PERFORMANCE GAPS AMONGST NATIONAL MARKETS

Airports in the **EU+ market**[2] **(+28.7%)** and in the **rest of Europe**[3] **(+26.4%)** grew passenger traffic at a similar pace in H1 compared to last year. But when **compared to pre-pandemic (H1 2019) levels**, airports in the **rest of Europe (-2.1%)** came closest to a full recovery, with the **EU+ market (-8.7%)** lagging behind.

- **In June**, the best passenger traffic performances in the **EU+ market** came from airports in Greece (+14.2%), Iceland (+9.3%), Luxembourg (+8.7%), Portugal (+8.1%) and Poland (+6.3%). Conversely, airports in Finland (-32.2%), Slovenia (-

31.9%), Germany (-21.7%), Bulgaria (-20.5%) and Sweden (-18.8%) remained well below their pre-pandemic levels.

Amongst the larger markets, airports in Italy (+1.9%) posted the best results, followed by those in Spain (-2.8), the UK (-6%) and France (-8.3%) – with airports in Germany being clear outliers.

- Looking at the **rest of Europe**, the best passenger traffic performance in **June** came from airports in Albania (+114.6%), buoyed by Ultra-Low Cost Carrier expansion — followed by those in Uzbekistan (+91.7%), Armenia (+87.6%), Kazakhstan (+43.6%) which benefited from Russian traffic shifting away from the EU+ market.

  Meanwhile, airports in Turkey (+0.6%) and Russia (+0.4%) achieved a full recovery.

LARGER AIRPORTS VS. REGIONAL/SMALLER AIRPORTS

Passenger traffic at **the Majors** (top 5 European airports) in **H1** remained at **-8.9% below their pre-pandemic (H1 2019) levels** - thus underperforming the European average.

- **London-Heathrow** (-4.3%) re-established itself as the busiest European airport in **H1**, handling 37 million passengers. **Istanbul** (+10.4%) came second with 35.6 million passengers and remains the only Major exceeding its pre-pandemic volumes.

- The Turkish hub was followed by **Paris-CDG** (-12.6% | 31.8 million passengers), **Amsterdam-Schiphol** (-17% | 28.7 million passengers) and **Madrid** (-2.7% | 28.5 million passengers).

- However, by June, **Frankfurt** (-20.1% | 26.9 million passengers) had rejoined the top 5 league, replacing Madrid in the fifth position.

Amongst other large airports (Group 1)[4], the only ones having fully recovered their pre-pandemic passenger volumes in **H1** were those relying on leisure/VFR demand and also benefitting from strong transatlantic demand: **Lisbon** (+8.7%), **Athens** (+7.3%), **Palma de Mallorca** (+3.8%), **Istanbul Sabiha Gökçen** (+1.6%) and **Dublin** (+1.5%).

Meanwhile, **regional and smaller airports**[5] **(+0.4%)** fully recovered their pre-pandemic (2019) passenger volumes in **H1** – and closed the month of **June** at **+2.2%**. However, there were also significant variations amongst these airports, with the ones serving popular tourism destinations and relying on Low-Cost Carriers often posting impressive performances.

These include for **H1**: **Trapani** (+163%), **Perugia** (+137%), **Kutaisi** (+82%), **Zaragoza** (+57%), **Memmingen** (+49%), **Funchal** (+41%), **Lodz** (+38%), **Beauvais** (+37%), **Zadar** (+23%), **Ponta Delgada** (+20%), **Paphos** (+19%) and **Menorca** (+18%).

FREIGHT & AIRCRAFT MOVEMENTS

Freight traffic across the European airport network decreased by **-7.1%** in **H1** compared to the same period last year, and by **-11.7% compared to pre-pandemic (H1 2019) levels**.

Amongst the top 10 European airport for freight traffic, the best performances in **H1** when compared to pre-pandemic volumes came from: **Istanbul** (+28%), **Milan-MXP** (+24%), **Leipzig/Halle** (20%), **Madrid** (+17%) and **Koln-Bonn** (+14%).

Aircraft movements in **H1** increased by **+15.5%** across the European airport network compared to the same period last year, and decreased by **-11%** when **compared to pre-pandemic (H1 2019) levels**.

DATA BY AIRPORT GROUPS

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 change of - 10%, -10.1%, +1.7% and -1.2%, as compared to pre-pandemic levels (**H1** 2019).

The airports that reported the highest increases in passenger traffic in **H1** when compared with the same period in 2019 are as follows:

GROUP 1: Istanbul IST **(+10.4%**), Lisbon (**+8.7%**), Athens (**+7.3%**), Palma de Mallorca (**+3.8%**) and Istanbul SAW (**+1.6%**).

GROUP 2: Milan BGY (**+18.2%**), Porto (**+14.9%**), Naples (**+14.2%**), Malaga (**+9.3%**) and Catania (**+9.0%**).

GROUP 3: Sochi (**+95.1%**), Almaty (**+50.1%**), Belgrade (**+25.8%**), Rhodes (**+15.5%**) and Krakow (**+14.8%**).

GROUP 4: Tirana (**+105.1%**), Yerevan (**+62.6%**), Memmingen (**+49.1%**), Vrellë/Lipjan (**+44.0%**) and Funchal (**+41.0%**).

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[1] Visiting Friends & Relatives.
[2] EU, EEA, Switzerland and UK.
[3] Albania, Armenia, Belarus, Bosnia & Herzegovina, Georgia, Israel, Kazakhstan, Kosovo, North Macedonia, Moldova, Montenegro, Russia, Serbia, Türkiye, Ukraine and Uzbekistan.
[4] Airports with more than 25 million passengers per annum (2019).
[5] Airports with less than 10 million passengers per annum (2019).

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