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FOR IMMEDIATE RELEASE

Passenger traffic up +4.5% in first half of 2025

Brussels, 6 August 2025: European airport trade body ACI EUROPE today released its air traffic report for the month of June, second quarter (Q2) and the first half (H1) of 2025.

Passenger traffic across the European airport network increased by **+4.5%** in **H1** compared with the same period last year, with the pace of growth remaining steady over both Q1 and Q2 — respectively +4.3% and +4.6%.

International passenger traffic accounted for all of the gains (+5.7%) as domestic traffic essentially remained flat (+0.2%). Overall, passenger volumes in H1 stood at +5.1% above their pre-pandemic (H1 2019) levels.

Olivier Jankovec, Director General of ACI EUROPE said: "*The positive performance of passenger traffic since the start of the year reflects the continued and strong resilience of demand in the context of significant supply pressures, operational disruptions, increasing geopolitical and geoeconomic tensions and renewed macro-economic uncertainties. All this brings renewed competitive pressures and traffic risks for airports, with much more volatile and unpredictable market dynamics where growth is no longer a given. The Summer season keeps delivering for now — let's see how the following months will be shaping up… "*

EU+ & REST OF EUROPE

Airports in the **EU+ area**[1] saw passenger volumes increasing by **+4.3%** in H1 compared to the same period last year, with significant divergences in performance between those located South-East and those located North-West of the bloc.

Accordingly, the best performances came from airports in Slovakia (+19.2%), Poland (+14.9%), Hungary (+14.2%), Malta (+11.7%) and Cyprus (+10.8%) — while airports in Sweden (-0.9%), Estonia (+0.2%), Iceland (+1.4%) and Luxembourg (+1.4%) posted the weakest results.

Amongst the largest EU+ markets, airports in Italy (+5.7%) registered the highest increase in passenger traffic, along with those in Spain (+4.5%). Conversely, airports in France (+3.6%), the UK and Germany (both at +2.3%) underperformed the EU+ average.

Meanwhile, airports in the **rest of Europe**[2] recorded a **+5.6%** increase in passenger traffic with performance gaps even more significant, reflecting the impact of both geopolitics and contrasted markets dynamics.

This resulted in airports in Moldova (+49.2%), Bosnia & Herzegovina (+31.1%), Israel (+27%), Kosovo (+16.6%) and Georgia (+13.7%) posting impressive results — while those in the larger market of Türkiye (+1.2%) and Azerbaijan (+1.6%) saw modest volume growth.

AIRPORT MARKET SEGMENTS

Major airports (over 40 million passengers) grew at the slowest pace in H1 with their passenger volumes increasing by **+3.3%** over the same period last year:

- Istanbul Sabiha Gökçen (+11.5%) and Rome Fiumicino (+6.5%) stood out, posting the best performances.
- London Heathrow remained the busiest European airport, welcoming 39.9 million passengers — a modest +0.2% increase over the H1 2024. The British hub was followed by Istanbul (39.1 million passengers | +2.5%), Paris-CDG (34.6 million passengers | +4.3%), Amsterdam Schiphol (32.7 million passengers | +3%) and Madrid (32.6 million passengers | +3%).

Mega airports (25-40 million passengers) saw passenger volumes increasing by **+4%,** with the best performances coming from Milan Malpensa (+11.4%), Athens and Copenhagen (both at +7.6%).

Large airports (10-25 million passengers) and **Medium airports (1-10 million passengers)** were the segments achieving the highest growth — both at **+5.4%**, largely driven by selective Low Cost Carrier expansion and the continued strength of leisure and VFR[3] demand:

- Apart from Tel Aviv (+27%) bouncing back, Krakow (+18.7%), Budapest (+15%) and Warsaw (+13.2%) stood out amongst the Large airports.
- Meanwhile, Trieste (+31.8%), Bournemouth (+24.9%), Kaunas (+20.6%), Poznan (+20%), Varna (+19.1%), Genoa (+18%), Girona (+17.1%), Memmingen (+16.4%), Wroclaw (+15.6%), Bari (+15.7%) and Cork (+14.5%) were amongst the fastest growing Medium airports.

Small airports (less than 1 million passengers) also saw a positive momentum with their passenger traffic increasing by **+5.1%.** However, these airports remain the only ones not having recovered their pre-pandemic (H1) passenger levels (-32.9%).

FREIGHT AND AIRCRAFT MOVEMENTS

Freight traffic across the European airport network remained stable year-on-year in H1 at **+0.1%** — with **EU+ airports** at **+0.4%** and **non-EU+ airports** at **-2%**. When compared to pre-pandemic (H1 2019) volumes, freight volumes stood at +8.7%.

Amongst the top 10 European airports for freight traffic, the best results compared to last year came from Madrid (+8.9%), Cologne (+3.5%), and London Heathrow (+2.3%).

Aircraft movements in H1 increased by +3.1% compared to the same period last year and remained at -2.2% below pre-pandemic (H1 2019) levels.

DATA BY AIRPORT GROUPS

In **June 2025**, airports welcoming more than 40 million passengers (Majors), airports welcoming between 25 and 40 million passengers (Mega), airports welcoming between 10 and 25 million passengers (Large), airports welcoming between 1 and 10 million passengers (Medium) and airports welcoming less than 1 million passengers (Small) reported an average increase of +2.4%, +3.4%, +2.4%, +4.2% and +5.2% as compared to June 2024.

The airports that reported the most dynamic growth in passenger traffic versus June 2024 are as follows:

- **Majors:** Istanbul SAW (+12.2%), Munich MUC (+6.1%), Barcelona BCN (+4.8%), Rome FCO (+3.0%), Frankfurt FRA (+2.8%).
- **Mega airports**: Milan MXP (+9.5%), Copenhagen CPH (+9.4%), Paris ORY (+7%), Dublin DUB (+5.8%), Athens ATH (+4.6%).
- **Large airports:** Krakow KRK (+18.1%), Warsaw WAW (+13.3%), Almaty ALA (+9.6%), Budapest BUD (+9.1%), Valencia VLC (+9.1%).
- **Medium airports:** Chișinău RMO (+39.7%), Bournemouth BOH (+29%), Varna VAR (+25%), Trieste TRS (+25%), Genoa GOA (+18.8%).
- **Small airports:** Bucharest BBU (+403.4%), Syros Island JSY (+112.8%), Karlstad KSD (+97.5%), Gyumri LWN (+66.9%), Volos VOL (+51.1%).

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[1] Albania, Armenia, Azerbaijan, Belarus, Bosnia & Herzegovina, Georgia, Israel, Kazakhstan, Kosovo, Moldova, Montenegro, North Macedonia, Russia, Serbia, Turkey, Ukraine, and Uzbekistan.

[2] EU, EEA, Switzerland and the UK.

[3] Visiting Friends and Relatives.

ENDS

ACI EUROPE Airport Traffic Reports are the only air transport reports to include all types of airline passenger flights to, from and within Europe: full service, low cost, charter and others. ACI EUROPE has recently expanded their monthly coverage to include over 450 airports, representing over 95% of European airport traffic.

The ACI EUROPE Airport Traffic Reports are a dedicated service for ACI EUROPE members and accredited journalists, available in the password protected sections of the 'Media Room' and the 'Members Room' on our website www.aci-europe.org.

For your password to access these sections, please contact us by e-mail at: natalia.sirbu@aci-europe.org. Your request will be validated, and the password will be e-mailed to your work address.

The report presents data for ACI EUROPE Members and might not be representative of the total European airport traffic.

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About ACI EUROPE

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.