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**FOR IMMEDIATE RELEASE**

## **European airports see 3% passenger traffic rise in July year-on-year**

**Brussels, 10 September 2025:** European airport trade body ACI EUROPE today released its preliminary air traffic report for July 2025 with data covering over 470 European airports.

**Passenger traffic across the European airport network** increased **+3.1% in July 2025** compared with July 2024. Historically, this ranks among the weakest July performances, below average for July growth rates in the decade before the COVID-19 crisis.

International passenger traffic outperformed and accounted for all of the gains (+3.7%) as domestic traffic remained flat (+0.7%). Overall, passenger volumes in July stood at +5% above their pre-pandemic levels (July 2019).

### **EU+ & REST OF EUROPE**

Airports in the **EU+ area**<sup>1</sup> posted results below the continental average with passenger volumes increasing by **+2.8%**. Significant divergences in performance between individual national markets continued throughout the month of July.

The best performances came from airports in Poland (+13.9%), Slovenia (+12.2%), Cyprus (+10.1%), and Monaco (+10.3%) — while airports in Latvia (-6.1%), Estonia (-6%), Iceland (-2.9%) and Austria (-0.5%) posted the weakest results.

All of the largest EU+ markets underperformed the EU+ average, with airports posting +2.7% passenger increase in Spain, +2.3% in Germany, +1.2% in Italy and France, and +1.1% in the UK.

Meanwhile, airports in the **rest of Europe**<sup>2</sup> recorded a **+4.7%** 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 (+45%), Georgia (+12.1%) and Kazakhstan (+11.2%) posting double-digit growth rates — while those in Russia (-15.1%), Israel (-5.6%), Azerbaijan (-5.2%) and Uzbekistan (-1.3%) reported losses.

### **AIRPORT MARKET SEGMENTS**

**Major airports (over 40 million passengers)** grew by **+2.7%** in July 2025 (vs. July 2024):

- Istanbul Sabiha Gökçen (+14.9%) was the fastest growing major airport in Europe, followed by Munich (+5.9%) and Istanbul IST (+4.5%).

- London Heathrow remained the busiest European airport while keeping its passenger growth rate flat (0%). The British hub was followed by Istanbul IST, Paris-CDG (+2.6%), Amsterdam Schiphol (+4%) and Madrid (+0.6%).

**Mega airports (25-40 million passengers)** saw passenger volumes increasing by **+2.7%**, with the best performances coming from Milan Malpensa (+7.5%), Dublin (+6.9%) and Paris-Orly (+5.5%).

**Large airports (10-25 million passengers)** achieved a +2.9% increase in passengers. The two busiest airports in Poland led the pack with impressive double-digit growth: Krakow (+18.9%) and Warsaw (+12.5%), followed by Türkiye's Izmir (+11.2%).

**Medium airports (1-10 million passengers)** and **Small airports (less than 1 million passengers)** were the only segments achieving growth above the European average — at **+3.9%** and **+4.0%** respectively, largely driven by selective Low Cost Carrier expansion and the continued strength of leisure and VFR<sup>3</sup> demand:

- Stand out performances amongst Medium airports came from Moldova's capital, Chisinau (+45%), Bournemouth (+31.9%) and Trieste (+22.3%).
- Meanwhile, Kiruna (+166.4%), Karlstad (+147.7%), Bucharest (+134.5%) and Syros Island (+125.5%) were amongst the fastest growing Small airports with triple-digit growth.

Small airports, despite achieving a positive momentum, remained the only ones not having recovered their pre-pandemic passenger levels (-22.4%).

## **FREIGHT AND AIRCRAFT MOVEMENTS**

**Freight traffic across the European airport network** decreased by **-1.5%** in July — with EU+ airports at -2% and non-EU+ airports at +2.1%. When compared to pre-pandemic volumes, freight stood at +10.4%.

Amongst the top 10 European airports for freight traffic, the best results compared to last year came from Liège (+14.4%), Madrid (+8.9%), and Milan Malpensa (+7.6%).

Aircraft movements in July increased by +2.9% compared to the same period last year.

## **DATA BY AIRPORT GROUPS**

The airports that reported the most dynamic growth in passenger traffic in July 2025 versus July 2024 are as follows:

**Majors:** Istanbul SAW (+14.9%), Munich MUC (+5.9%), Istanbul IST (+4.5%), Amsterdam AMS (+4%), Barcelona BCN (+2.9%).

**Mega airports:** Milan MXP (+7.5%), Dublin DUB (+6.9%), Paris ORY (+5.5%), Zurich ZRH (+4.8%), Copenhagen CPH (+4.5%).

**Large airports:** Krakow KRK (+18.9%), Warsaw WAW (+12.5%), Izmir ADB (+11.2%), Edinburgh EDI (+9.5%), Tirana TIA (+8.9%).

**Medium airports:** Chişinău RMO (+45%), Bournemouth BOH (+31.9%), Trieste TRS (+22.3%), Astana NQZ (+19%), Wrocław WRO (+18.7%).

**Small airports:** Kiruna KRN (+166.4%), Karlstad KSD (+147.7%), Bucharest BBU (+134.5%), Syros Island JSY (+125.5%), Córdoba ODB (+71%).

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<sup>1</sup> EU, EEA, Switzerland and the UK.

<sup>2</sup> Albania, Armenia, Azerbaijan, Belarus, Bosnia & Herzegovina, Georgia, Israel, Kazakhstan, Kosovo, Moldova, Montenegro, North Macedonia, Russia, Serbia, Turkey, Ukraine, and Uzbekistan.

<sup>3</sup> 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.

The monthly figures will be revised as more airports submit data. The preliminary report is based on a sample of around 450 airports, who submit data within 4 weeks of month end. The definitive report is based on data from 650 airports.

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](http://www.aci-europe.org).

For your password to access these sections, please contact us by e-mail at: [natalia.sirbu@aci-europe.org](mailto: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.