

ACI EUROPE

Boulevard du Régent
37-40 (5th floor),
1000 Brussels,
Belgium
www.aci-europe.org

FOR IMMEDIATE RELEASE

Passenger traffic turns negative for the first time since post-COVID recovery

Brussels, 04 June 2026: European airport trade body ACI EUROPE today released its traffic report for April 2026, revealing that **passenger traffic across the European airport network fell by -0.7%** compared to the same month last year.

This decline while marginal marks a significant milestone: the first year-on-year drop in passenger traffic since Europe's air transport recovery from the COVID-19 pandemic began in April 2021.

April's performance reflects a combination of factors including the conflict in the Middle East impacting predominantly the non-EU+ market, the partial shift of the Easter holidays into March this year, and industrial action heavily affecting the German market.

EU+ MARKET STILL GROWING & REGIONAL/NATIONAL DIVERGENCES WIDENING

While passenger traffic in the **Non-EU+ market¹** contracted by **-7.6%**, the **EU+ market²** continued to expand, posting growth of **+0.6%**, with **EU airports** alone increasing by **+1.4%**.

- Within the Non-EU+ market, airports in Israel (-73.4%) suffered massive losses while airports in the major market of Türkiye also saw passenger traffic decreasing (-5.1%), along with those in Georgia (-16.3%) and Azerbaijan (-12.9%) – a reflection of their exposure to the Middle East region.

Meanwhile, a number of smaller markets to the West of the non-EU+ area kept posting impressive increases: North Macedonia (+30.6%), Albania (+25.3%), and Moldova (+24.6%).

- Among the largest EU+ markets, airports in Spain (+3.7%) and Italy (+2.2%) posted the best results, while those in Germany (-8.5%), the UK (-2.1%), and France (-0.9%) saw passenger volumes receding.

The best EU+ performances came from airports in Slovakia (+125.2%), Slovenia (+14.6%), Estonia (+12.1%), Malta (+13.5%) and Poland (+8.3%).

At the other end of the spectrum, airports in Cyprus (-16.1%) and Iceland (-11.7%) registered the steepest decreases, followed by those in Austria (-7.4%) and Switzerland (-6.1%).

Olivier Jankovec, Director General of ACI EUROPE commented: *"April marks a clear inflection point for European air traffic. While we were already seeing a normalisation of passenger traffic growth after*

the strong post-pandemic bounce back, geopolitical instability – most notably the war in the Middle East – is now further weighing on growth and exposing significant differences in performance across markets. The encouraging news is that demand generally remains strong, airlines capacity adjustments limited and fears over potential jet fuel shortages have eased.”

“However, our most immediate concern remains the severe disruptions and hardship imposed upon passengers by border control processes linked to the Schengen Entry/Exit System. Unless authorities are allowed to introduce greater flexibility, including fully suspending the system where operationally necessary, disruptions for passengers will intensify over the coming weeks and months. For many airports and airlines, the situation risks becoming unsustainable. It is puzzling that at EU level nobody seems to really care about that, and the massive damage this is inflicting upon Europe’s reputation as a welcoming and efficient destination.”

SPANISH & DUTCH HUBS MOST RESILIENT

Amongst **the Majors**³, Barcelona (+4.1%), Madrid (+3.3%) and Amsterdam-Schiphol (+2.7%) were the only ones seeing passenger traffic increasing in April.

Munich (-16.4%) and Frankfurt (-11%) posted the sharpest decrease largely due to no less than 7 days of industrial action during the month.

Istanbul Airport (-6.8%) and Istanbul Sabiha Gökçen (-3.4%) – usually top performers – both contracted in April, with volumes also declining at London Gatwick (-8.8%) and London-Heathrow (-5.34%). Meanwhile, Rome-Fiumicino (-0.6%) and Paris-CDG (0.0%) were essentially flat.

MEDIUM & SMALL AIRPORTS OUTPERFORMING

Overall **the Majors (-3.5%)** along with **Mega airports (-1%)** and **Large airports (+0.1%)** were the segments most impacted by the conflict in the Middle East as they concentrate most of Europe’s connectivity to the region.

Conversely, **Medium airports (+2.1%)** and **Small airports (+5.5%)**, whose route network is predominantly intra-European, remained largely insulated, on the back of Low Cost Carriers not reducing capacity and some demand shifting from long-haul to medium/short-haul travel.

Yet, Small airports kept faring the worst when compared to pre-pandemic (2019) levels at **-27.7%**, reflecting structurally changed market conditions and significant financial viability challenges.

FREIGHT AND MOVEMENTS

Freight traffic at European airports decreased by **-5.3%** in April, while **aircraft movements** registered a small decrease at **-0.8%**.

DATA BY AIRPORT GROUPS

In March, 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 change of -3.5%, -1%, +0.1%, +2.1% and +5.5% as compared to the preceding year.

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

Majors: Barcelona BCN (+4.1%), Madrid MAD (+3.3%), Amsterdam AMS (+2.7%), Paris CDG (0%), Rome FCO (-0.6%).

Mega airports: Málaga AGP (+9.5%), Zurich ZRH (+6.1%), Copenhagen CPH (+5.8%), London STN (+3.1%), Palma de Mallorca PMI (+2.6%).

Large airports: Tirana TIA (+25.3%), Charleroi CRL (+16.2%), Malta MLA (+13.5%), Milan LIN (+13.3%), Kraków KRK (+13%).

Medium airports: Bratislava BTS (+144.7%), Skopje SKP (+31.1%), A Coruña LCG (+25.4%), Chişinău RMO (+24.6%), Timişoara TSR (+21.5%).

Small airports: Stockholm BMA (+699.8%), Bucharest BBU (+210.6%), Hatay HTY (+165.8%), Córdoba ODB (+135.1%), Friedrichshafen FDH (+89.1%).

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

² EU, EEA, Switzerland and the UK.

³ Airports over 40 million passengers.

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Notes to editors

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: corise.nel@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.

For more information, contact:

Agata Lyznik
Director of Communications, Media & Events
Tel: +32 2 552 09 89
Email: agata.lyznik@aci-europe.org

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.