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Passenger traffic comes closest ever to full recovery in January '23

Brussels, 8 March 2023: European airport trade body ACI EUROPE today released its air traffic report for January 2023.

Passenger traffic across the European airport network increased by **+69%** in January compared to the same month last year – when Omicron-related travel restrictions had halted the recovery. The growth was predominantly driven by **international passenger traffic (+85%)** with **domestic passenger traffic (+35%)** expanding at a much slower pace.

When **compared to pre-pandemic (January 2019**) levels, passenger traffic in January stood at **-11%** - a significant improvement over the preceding month (**-14%** in December 2022). This is the best monthly performance and thus closest to a full recovery since the start of the COVID-19 pandemic.

Olivier Jankovec, Director General of ACI EUROPE commented: *"2023 is off to a pretty good start thanks to the continued resilience of passenger demand in the face of higher air fares and wider inflationary pressures across the economy. 42% of Europe's airports have now recovered their pre-pandemic traffic volumes and while there are significant performance variations across markets, we expect more to hit the same milestone in the coming months. Continued capacity expansion by ultra-Low Cost Carriers and the recent lifting of pre-departure testing requirements for travellers from China should keep driving the recovery forward for airports."*

He added: *"For now, our immediate focus is on getting ready for the peak Summer season. Europe's airports have stepped up preparedness plans. In doing so, they have reached out to all their operational partners – airlines, ground handlers, border control forces and Air Traffic Control - to identify possible risks and stress points, in particular as regards staffing levels, and to devise mitigation measures. By and large, the aviation system capacity on the ground should cope with demand – and capacity limitations will remain the exception."*

EU+ MARKET IN THE LEAD

EU+ airports[1] saw passenger traffic growing by **+82%** in January compared to the same month last year. The highest increases came from airports in the UK (+128%), Ireland (+115%) and Cyprus (+111%).

When **compared to pre-pandemic (January 2019) levels** passenger traffic stood at **-11%**:

- 11 national markets achieved or exceeded a full recovery in January - compared to just 1 in the previous month (December 2022). The best performances came from airports in Portugal (+12.8%), Cyprus (+11.2%) and Luxembourg (+9%), followed by those in Croatia (+5.4%), Malta (+3.6%) and Romania (+3.2%).

- Conversely, airports in Slovakia (-45.2%), Slovenia (-44.1%) the Czech Republic (-33.3%) and Germany (-31.7%) remained the farthest from achieving a full recovery. This reflects a mix of factors including the impact of the war in Ukraine and the lack of penetration or loss of Low Cost traffic.

- Among the largest EU+ markets - and aside from the underperformance of airports in Germany - airports in Spain +2.2%) posted the best results, followed by those in Italy (-4.7%) France (-11%) and the UK (-14.3%).

At airports in the **rest of Europe**[2], passenger traffic grew by **+27%** in January compared to the same month last year.

The impact of the war kept weighing on performance – with the loss of all commercial air traffic for Ukrainian airports and passenger volumes decreasing by -9.4% at Russian airports. Meanwhile airports in Armenia (+70%) and Georgia (+49.2%) and to a lesser extent Turkey (+47.9%) benefited from war-related traffic shifts.

When **compared to pre-pandemic (January 2019) levels**, passenger traffic stood at **-8%**.

Airports in Albania (+86.2%), Armenia (+80.9%), Kosovo (+39.6%) and Serbia (+28.3%) far exceeded their pre-pandemic volumes, while those in the major market of Turkey (-2.6%) came very close to a full recovery. Airports in Russia (+6.6%) still managed to remain above their pre-pandemic volumes as passenger traffic kept shifting to domestic and non-EU+ markets.

RECOVERY PATTERNS SHAPING AIRPORT PERFORMANCE

Passenger traffic at **the Majors** (top 5 European airports) grew by **+73.5%** in January compared to the same month last year. It remained **-10.6% below pre-pandemic (January 2019) levels** – an improvement compared to the preceding month (December 2022 at -12.1%), with the positive impact of the re-opening of the Chinese market still to materialise.

- **By welcoming 5.64 million passengers, Istanbul went back to being the busiest European airport in January** – a position taken by London-Heathrow in the final months of 2022. This represented an increase of +62.6% over the same month last year, allowing the Turkish hub to exceed its pre-pandemic (January 2019) volumes by +8.1%.

- **London-Heathrow** came second with 5.49 million passengers, followed by **Paris-CDG** with 4.72 million passengers. Volumes increased by +111.2% and +73.2% respectively for the British and French hubs compared to the same month last year – and remained -7.4% and -12.1% below pre-pandemic (January 2019) levels.

- **Madrid** came in the fourth position with 4.43 million passengers. The performance of the Spanish hub reflects the significant penetration of Low Cost Carriers and its lower exposure to Asia. Along with Istanbul, it was the only Major exceeding pre-pandemic volumes (+1%). Madrid was followed by **Amsterdam-Schiphol** with 3.9 million passengers (+56.6% compared to the same month last year / -22.2% compared to January 2019).

The passenger traffic performance of **other large airports**[3] in January reflected a recovery still largely driven by intra-European and transatlantic routes, dominated by leisure demand and characterised by significant (but selective) capacity expansion from Ultra-Low Cost Carriers.

Accordingly, **Lisbon** (+13.3%), **Athens** (+3.9%), **Dublin** (+2%), **Istanbul-Sabiha Gokcen** (+1.3%) all exceeded their pre-pandemic (January 2019) volumes. Meanwhile, **Berlin** (-45.9%), **Munich** (-28%), **London-Gatwick** (-26.9%) and **Frankfurt** (-21.3%) remained well below.

The same recovery patterns and market dynamics brought **regional and smaller airports**[4] close to a full passenger traffic recovery (-4.9% for airports with less than 10 million passengers per annum when compared to January 2019).

There were however significant variations in performance amongst regional airports, with those serving popular tourist destinations and/or relying on Low Cost Carriers seeing passenger volumes exceeding pre-pandemic (January 2019) levels - including: **Varna** (+60.1%), **Batumi** (+56%), **Memmingen** (+40.5%), **Paphos** (+39.2%), **Funchal** (+38.5%), **Alghero** (+31.5%), **Bergamo** (+22.3%), **Krakow** (+19.8%), **Catania** (+14.6%), **Charleroi** (+13.6%) and **Eindhoven** (+12.9%).

FREIGHT & AIRCRAFT MOVEMENTS

Freight traffic across the European airport network decreased by **-15%** in **January** compared to the same month last year, with EU+ airports and airports in the rest of Europe experiencing a similar slump. As a result, freight traffic remained **-20%** below (January 2019) pre-pandemic levels.

Aircraft movements increased by **+28%** across the European airport network compared to the same month last year, with airports in the EU+ markets at **+32%** and those in the rest of Europe at **-10%.**

DATA BY AIRPORT GROUPS

During the month of **January**, 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 adjustment of **-12.9%**, **-8.8%**, **-2.9%** and **-2.6%**, as compared to pre-pandemic traffic levels (January 2019).

The airports that reported the highest increases in passenger traffic for January 2023 when compared with January 2022 are as follows:

GROUP 1: London STN (**+173.9%**), London LGW (**+170.6%**), Rome FCO (**+143.1%**), Manchester (**+119.1%**) and Dublin (**+113.5%**).

GROUP 2: Tel Aviv (**+270.1%**), Edinburgh (**+159.8%**), Birmingham (**+141.8%**), Venice (**+139.4%**) and London LTN (**+120.2%**).

GROUP 3: London LCY (**+228.6%**), Malta (**+137.8%**), Newcastle (**+126.9%**), Keflavik (**+111.5%**) and Pisa (**+107.6%**).

GROUP 4: Leeds (**+177.6%**), Nuremberg (**+174.7%**), Dresden (**+167.5%**), Florence (**+154.5%**) and Cork (**+146.6%**).

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

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