



AIRPORTS COUNCIL
INTERNATIONAL



European Airport Traffic Forecast Scenarios up to 2028

April 2025

European Airport Passenger Traffic Forecast Snapshot

2025 & Beyond: Slower/”Normalised” Growth Ahead

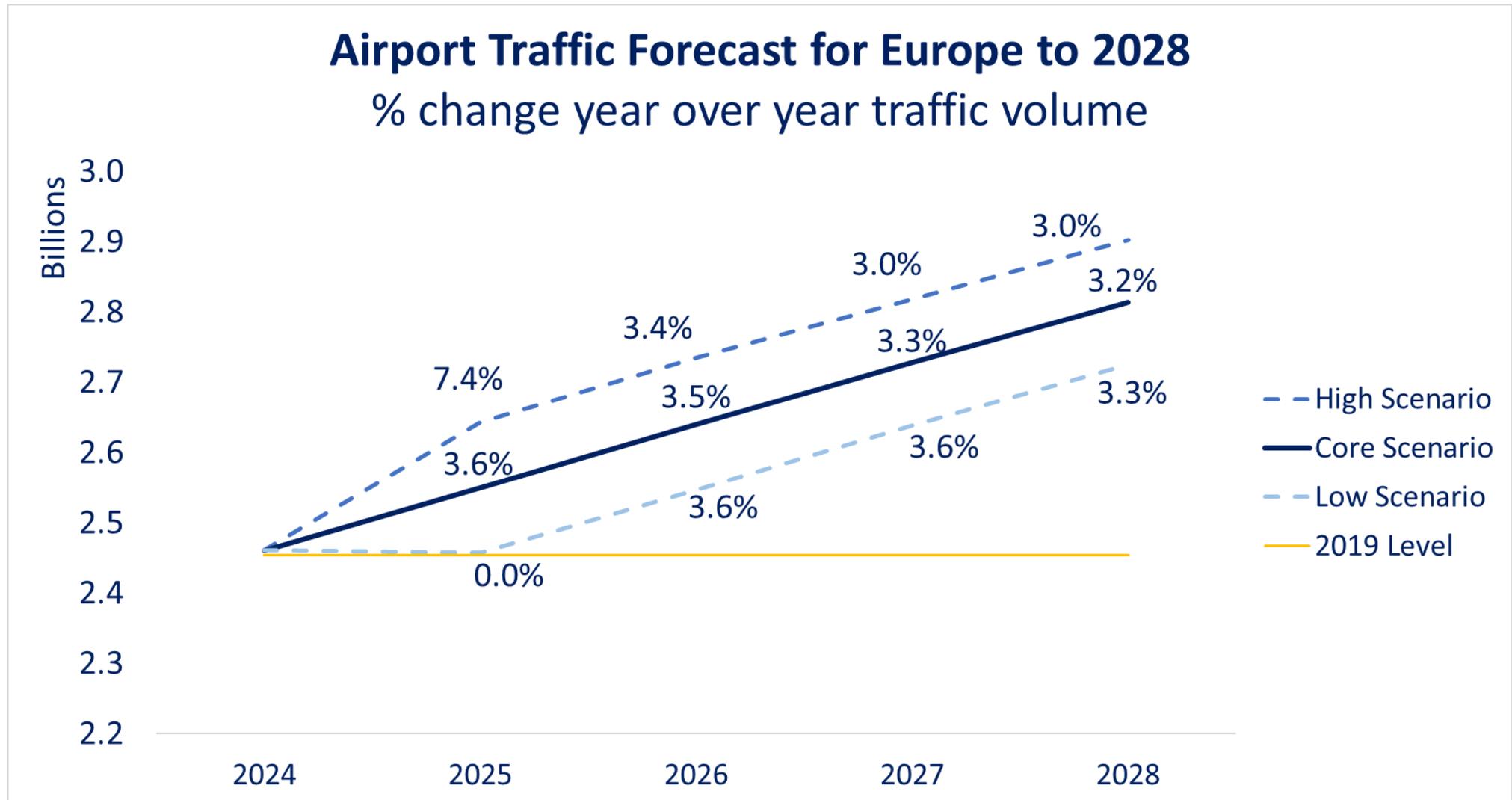
- The post-pandemic rebound is fading, with growth dropping from **+7.7%** in 2024 vs. 2023 to **+3.6%** in 2025 (vs. 2024) before slowing further at **+3.2%** in 2028 (vs. 2027).
- This reflects increased macro-economic uncertainty and continued inflationary pressures, as well as capacity constraints and growing market maturity. The impact of EU/UK climate policy will remain marginal until 2028 but is set to kick in afterwards.
- As a result, when compared to pre-pandemic (2019) levels, passenger volume is set to stand at **+3.9%** in 2025 and **+7.9%** in 2026.

Traffic Still Below Pre-COVID Projections

- Despite reaching 2019 levels in 2024, traffic remains well below original pre-pandemic forecasts.
- Airports continue to face financial strain as long-term investments were based on higher expected volumes.

European Airport Passenger Traffic 3-Year Forecast:

Year on Year Growth

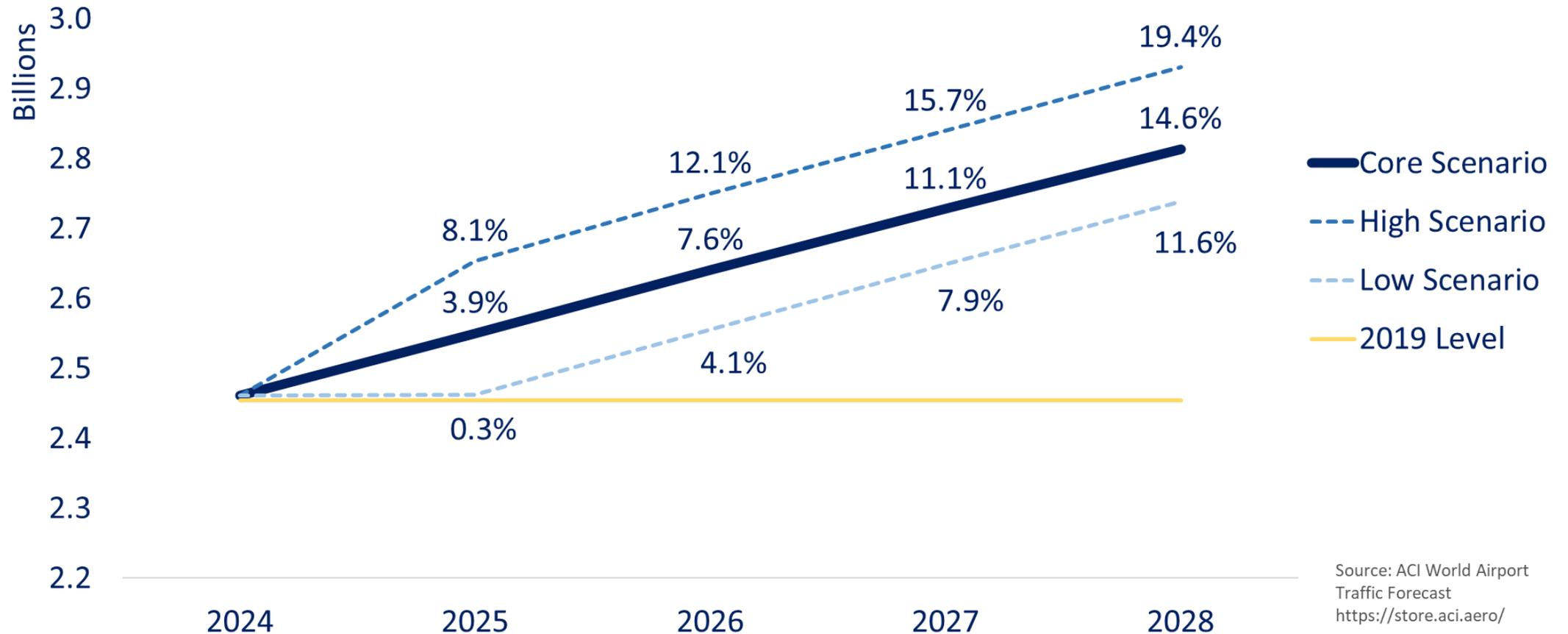


European Airport Passenger Traffic 3-Year Forecast:

Relative to 2019 level

Airport Traffic Forecast for Europe to 2028

% change versus 2019 Traffic Volume

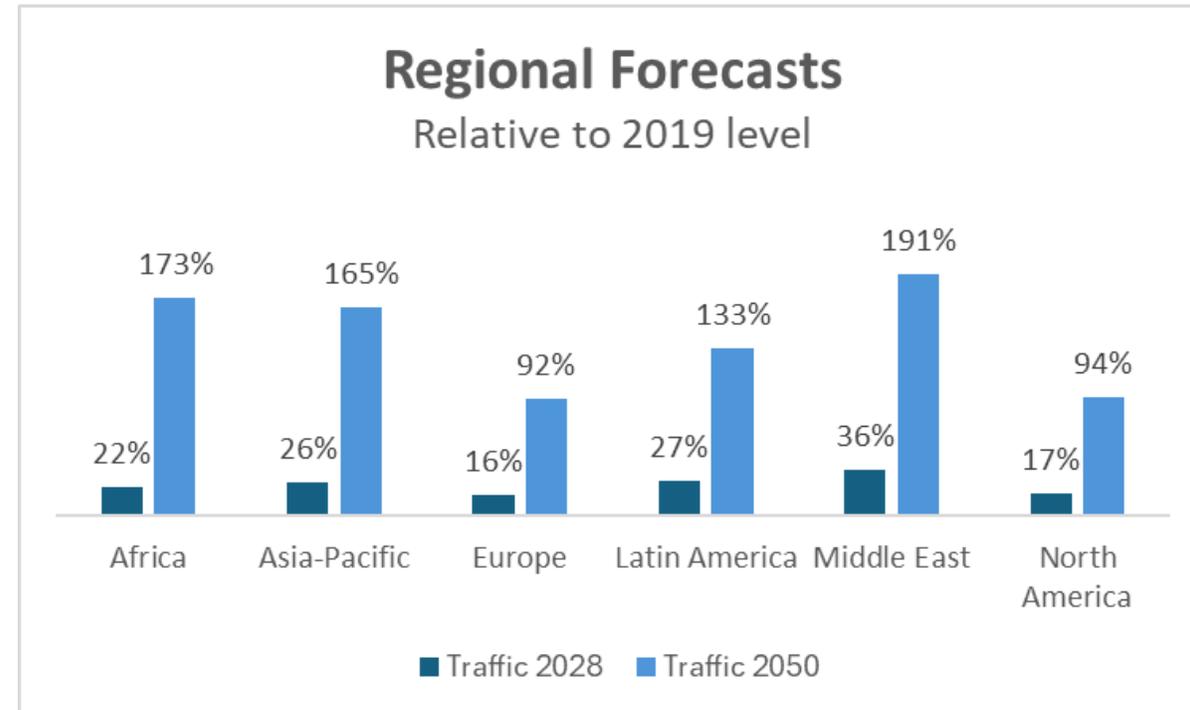


World Airport Traffic Forecast

The forecast for the European Region is part of the ACI World Airport Traffic Forecast.

The ACI World Airport Traffic Forecast is based on an ensemble of forecast methods extrapolating from ACI's global traffic database.

Methods used include trend decomposition, Exponential Smoothing, ARIMA methods, and linear regression with GDP variables.



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