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FOR IMMEDIATE RELEASE

Passenger traffic momentum holding up in Q1 for European airports

Brussels, 5 May 2025: Europe's passenger traffic maintained positive momentum during the first quarter of 2025 (Q1) — although growth has slowed down compared to previous years, signalling post-Covid traffic recovery consolidation.

The latest traffic report released by ACI EUROPE today reveals that **passenger traffic across the European airport network** increased by **+4.3%** during **Q1 2025** over the same period last year. This compares to a growth of +10.2% in Q1 2024 vs. Q1 2023. When compared to pre-pandemic (Q1 2019) levels, passenger traffic stood at +3.2%.

The growth in passenger volumes in Q1 2025 was entirely driven by **international traffic (+5.7%)** as **domestic traffic** remained flat **(0%)** when compared to the same period last year. When compared to pre-pandemic (Q1 2019) levels, international passenger traffic in Q1 2025 stood at +8.9% while domestic passenger traffic remained at -12.8%.

The year-on-year monthly growth decelerated in Q1 2025 — from +6.9% in January through +3.4% in February and +3% in March, with the latter reflecting Easter falling in April this year.

Olivier Jankovec, Director General of ACI EUROPE said: *"Our Q1 data shows that the post-pandemic travel boom is fading as we are moving towards "normalised" growth rates in passenger volumes, with demand generally remaining resilient so far. This reflects consumers prioritising experiences despite an increasingly challenging economic environment, along with the dynamism of aviation markets in the Eastern and Southern parts of our continent and Central Asia."*

He added: *"While transatlantic demand is weakening, we expect the European part of that to shift to other markets, and remain confident about the Summer season. The big question is what happens as of next Winter given the unprecedented macro-economic uncertainty we are now facing as a result of the Trump administration's attack on the global multilateral trading system. This means that in addition to geopolitics and the current supply pressures coming from aircraft delivery and maintenance delays, as well as infrastructure capacity constraints, and airlines focusing on yields rather than capacity expansion, we could see downward demand pressures becoming a reality."*

NON-EU+ MARKET OUTPERFORMING

Airports **outside the EU+ market**[1] outperformed the European average in **Q1 2025**, with their passenger traffic increasing by **+5.7%** compared to the same period last year. This was driven by the recovery of airports in Israel (+60.4%) as well as the impressive results in the fast-growing markets of Moldova (+56%), Bosnia & Herzegovina (+41.7%), Kosovo (+15.6%), Uzbekistan (+15.5%), Albania (+9.1%) and Georgia (+8.5%). Meanwhile, passenger traffic remained flat at airports in Türkiye (0%) and kept decreasing in Russia.

Passenger traffic expanded by **+4.1%** in the **EU+ market**[2], where divergences in performances amongst national markets remained significant. Airports in Slovakia (+15.9%), Poland (+15.4%), Hungary (+14.7%), Malta (+13.9%) and Lithuania (+13%) posted the best results, along with those in Croatia (+9.6%), Romania (+9.2%) and Greece (+8.8%). Conversely, passenger traffic decreased in Iceland (-2.5%), Sweden (-2.2%) and Ireland (-0.5%) and remained lacklustre in Germany and Austria (both at +1.1%) as well as in Switzerland (+1.6%) and the UK (+1.7%).

Amongst the other larger EU+ markets, Italy (+6.6%) came on top, followed by Spain (+4.5%) and France (+4.2%).

PERFORMANCE GAPS & AIRPORT MARKET SEGMENTS

There were also significant performance gaps in **Q1 2025** passenger traffic across the different segments of the airport industry when compared to the same period last year. These reflect increased competitive pressures on the back of post-pandemic structural changes in the aviation market. This is further illustrated by the fact that passenger traffic remained below pre-pandemic (Q1 2019) levels at **44%** of Europe's airports.

- The **Majors** (over 40m passengers) grew at a slower pace in Q1 2025 at **+3%.**

  Amongst the Majors, the best results came from Rome-Fiumicino (+9.4%) and Istanbul Sabiha Gokçen (+9.0%).

  While remaining the busiest European airports, London-Heathrow (-1.5%) was affected by a massive power outage in March. Istanbul (+1.6%) came in the second position, followed by Paris-CDG (+5.6%) and Madrid (+4.5%) — with the latter replacing Amsterdam-Schiphol (+3%) in the fourth position. Meanwhile, passenger traffic declined at Frankfurt (-0.9%), resulting in the German hub maintaining its 6th position.

- **Small airports** (less than 1m passengers) posted the best results, with their passenger traffic increasing by an impressive **+13.4%**. However, they remained a worrying -34.5% below their pre-pandemic (Q1 2019) volumes — as both Low Cost Carriers and Full Service Carriers kept prioritising larger and more affluent markets.

- **Large airports** (10-25m passengers) posted the second best results at **+6.1%**, with Tel Aviv (+60.4%), Krakow (+21.9%), Budapest (+15.5%), Alicante (+14.6%) and Valencia (+14.3%) leading.

FREIGHT AND AIRCRAFT MOVEMENTS

Freight traffic across Europe's airports declined **-1.7%** year-on-year in **Q1 2025** — with **EU+ airports** at **-1.5%** and **non-EU+ ones** at **-3.2%**.

Amongst the top 10 European airports for freight traffic, the best results came from Madrid (+7.6%), Liège (+5.8%), Cologne/Bonn (+4.9%) and Frankfurt (+0.8%).

Aircraft movements in **Q1 2025** rose by **+3.7%** compared to the same period last year but still remained **-5.3%** below pre-pandemic levels.

DATA BY AIRPORT GROUPS

In **Q1 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 +3.0%, +3.9%, +6.1%, +3.6% and +13.4% as compared to the preceding year.

The airports that reported the most dynamic growth in passenger traffic versus Q1 2024 are as follows:

Majors: Rome FCO (+9.4%), Istanbul SAW (+9.0%), Paris CDG (+5.6%), Madrid MAD (+4.5%), Barcelona BCN (+3.2%),

Mega airports: Milan MXP (+12.4%), Athens ATH (+11.4%), Copenhagen CPH (+6.5%), Manchester MAN (+6.2%), Málaga AGP (+6.0%).

Large airports: Tel-Aviv TLV (+60.4%), Krakow KRK (+21.9%), Budapest BUD (+15.5%), Alicante ALC (+14.6%), Valencia VLC (+14.3%).

Medium airports: Chișinău RMO (+56.0%), Sarajevo SJJ (+41.7%), Trieste TRS (+41.7%), Kaunas KUN (+34.6%), Poznan POZ (+28.4%).

Small airports: Bucharest BBU (+1348.6%), Antakya HTY (+272.8%), Ostend OST (+221.6%), Rodez RDZ (+190.8%), Salamanca SLM (+175.6%).

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

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

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.