

## Passenger traffic showed continued resilience in May

### ACI EUROPE

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**Brussels, 7 July 2025:** European airport trade body ACI EUROPE today released its air traffic report for May 2025, revealing continued disparities in passenger traffic performance across the European airport market, as well as a significant drop in freight traffic.

**Passenger traffic** in the European airport network increased by **+3.4%** in May compared to the same month last year — resulting in volumes standing at +8% above pre-pandemic (May 2019) levels.

The growth was entirely driven by **international passenger traffic (+4.3% vs. May 2024)**, with **domestic passenger** traffic slightly decreasing (**-0.2% vs. May 2024**).

As in previous months, airports **outside the EU+ market<sup>1</sup>** outperformed in May with passenger volumes growing by **+6%**. This reflected impressive growth at airports in Moldova (+41.9%), Bosnia & Herzegovina (+30.5%), Georgia (+23.4%), Israel (+17.5%) and Kazakhstan (+14.5%). Meanwhile, the growth dynamic softened for airports in Türkiye (+1.8%), while those in Russia reported declining volumes (-9.2%).

The **EU+ market<sup>2</sup>** saw passenger traffic increasing by **+2.9%** with the best performances coming from airports in the Eastern part of the bloc: Slovakia (+33%), Hungary (+15.3%), Poland (+13.7%) and Slovenia (+13.5%) — along with Cyprus (+10.9%). Conversely, Estonia (-6.2%), Luxembourg (-3.6%), Sweden (-2%), Switzerland (-1.4%) and Norway (-0.4%) reported declining volumes. Amongst the largest EU+ markets, the best results came from Italy (+4.4%), Spain (+3.3%) and the UK (+1.7%) while Germany (+0.8%) and France (+0.7%) significantly underperformed, hampered by punitive national aviation taxes.

**Olivier Jankovec, Director General of ACI EUROPE** commented: *"Passenger traffic remained resilient in May as consumers continue to prioritise travel and leisure as part of the underlying shift from material to experiential consumption. This bodes well for the peak Summer months. However, the performance of many airports continues to be hampered by aircraft shortages and maintenance issues affecting airlines, Air Traffic Management disruptions and punitive aviation taxes — all taking their toll on air connectivity. It also remains to be seen how geopolitics and geoeconomics will shape consumer and business confidence moving forward. The former has had differentiated traffic impacts upon airports — negative for some and positive for a few others — while so far geoeconomics have mainly impacted freight traffic but not passenger traffic overall."*

## PERFORMANCE GAPS & AIRPORT MARKET SEGMENTS

**Major airports (over 40m passengers)** kept growing at the slowest pace in May with passenger volumes increasing by **+2.7%** compared to the same month last year:

- The strongest performances in that segment came from Istanbul Sabiha Gökçen (+14.9%), Rome Fiumicino (+4.1%), Barcelona (+3.6%) and Munich (+3.2%).
- London-Heathrow remained the busiest European airport welcoming 7.2m passengers during the month, but seeing volume expanding by just +0.4%. The British hub was followed by Istanbul (7m passengers | +2.6%) and Paris CDG (6.2m passengers | +1.7%).

**Small airports (less than 1m passengers)** outperformed all other segments of the airport industry, with their passenger traffic increasing by **+11%**. However, they also remained the only segment for which volumes have not yet recovered pre-pandemic (May 2019) levels (-26.7%).

**Larger regional airports serving popular tourism destinations and/or relying on VFR<sup>3</sup> demand** generally kept performing well, although restraints on airline capacity deployment increased competitive pressures further and resulted in significant performance variations. Some of the best results came from: Varna (+40.1%), Tivat (+21.9%), Cork (+17.5%), Wrocław (+17%), Girona (+15.3%), Funchal (+14.9%), Cluj (+12.8%), Split (+11.5%) and Florence (+10.5%).

The main **continental Low Cost Carrier bases** posted mixed results in May — a significant departure from the post-Covid recovery trends which had seen them growing exponentially: Bergamo (-0.8%), Beauvais (+3.6%) and Charleroi (+5.7%).

## FREIGHT AND AIRCRAFT MOVEMENTS

**Freight traffic** across Europe's airports declined **-6.3%** year-on-year in May — with **EU+ airports** at **-7.6%** and **non-EU+** at **+1.1%**. When compared to pre-pandemic (May 2019) levels, freight volumes were at -0.7%.

Amongst the top 10 European airports for freight traffic, the best results compared to last year came from Liège (+18.1%), Brussels (+15.7%), East Midlands (+9.5%), London Heathrow (+7.1%) and Frankfurt (+4.9%).

**Aircraft movements** in May increased by **+2.4%** compared to the same period last year and were just above pre-pandemic (May 2019) levels (+0.1%).

## DATA BY AIRPORT GROUPS

In **May 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 +2.7%, +2.8%, +4.2%, +3% and +11% as compared to the preceding year.

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

**Majors:** Istanbul SAW (+14.9%), Rome FCO (+4.1%), Barcelona BCN (+3.6%), Munich MUC (+3.2%), Istanbul IST (+2.6%).

**Mega airports:** Milan MXP (+9.2%), Málaga AGP (+8.7%), Paris ORY (+6.7%), Copenhagen CPH (+5.5%), Manchester MAN (+4.7%).

**Large airports:** Tel-Aviv TLV (+17.5%), Budapest BUD (+16.1%), Krakow KRK (+14.9%), Warsaw WAW (+13.6%), Almaty ALA (+11.6%).

**Medium airports:** Vigo VGO (+472.7%), Kutaisi KUT (+49.3%), Chişinău RMO (+41.9%), Varna VAR (+40.1%), Bratislava BTS (+34%).

**Small airports:** Bucharest BBU (+898.8%), Oradea OMR (+105.5%), Linz LNZ (+70.4%), Leon LEN (+48.5%), Andoya ANX (+42.1%).

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<sup>1</sup> Albania, Armenia, Belarus, Bosnia & Herzegovina, Georgia, Israel, Kazakhstan, Kosovo, North Macedonia, Moldova, Montenegro, Russia, Serbia, Turkey, Ukraine, and Uzbekistan.

<sup>2</sup> EU, EEA, Switzerland and the UK.

<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. 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](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.