

EUROPEAN AIR PASSENGER TRAFFIC EXPANDS BY +3.8% IN MARCH DESPITE MIDDLE EAST CONFLICT

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

Brussels, 13 May 2026: European airport trade body ACI EUROPE today released its traffic report for March and the first quarter of 2026.

Passenger traffic across the European airport network increased by **+3.8% in March** compared to the same month last year – thus remaining broadly in line with the previous month (February at +4.2%) despite the conflict in the Middle East which started on 28 February.

However, while airports in the **EU+ market¹** saw passenger volumes expanding at **+4.1%** (vs. +3.9% in February), those in the **rest of Europe²** saw growth moderating to **+2.6%** (vs. +5.9% in February), mainly as result of the massive impact of the conflict on Israeli airports (-86.3%).

Olivier Jankovec, Director General of ACI EUROPE commented: *“Overall, the first month of the Middle East war has once again highlighted the resilience of demand for air transport in the face of another major geopolitical shock. Many European airports lost direct connectivity to the region, but those traffic flows connecting onward to Asia rapidly adapted through alternative direct and indirect routings. To some extent, this even supported intra-European traffic flows, while the transatlantic market remained extremely dynamic.”*

He added: *“Looking at the peak Summer months ahead of us, we do not – for now – expect a contraction of passenger volumes, unless we end up facing significant jet fuel shortages. Middle Eastern airlines are now restoring their European network while European ones have only made limited capacity adjustments – reflecting the protection afforded by fuel-cost hedging strategies and the continued resilience of demand.”*

“However, past the peak Summer months, the traffic outlook is effectively a black box for the industry. It all hinges on geopolitics and the fallout of the oil crisis – with the prospect of a cost-of-living shock testing demand resilience.”

NATIONAL MARKET DIVERGENCES

Within the **EU+ market**, the best passenger traffic performances came from airports in Slovakia (+130.7%), Slovenia (+17%), Denmark (+13.8%), Malta (+12.5%) and Croatia (+10.8%).

At the other end of the spectrum, airports in Cyprus (-15.3%) were hit hard by the fallout from media coverage of the drone incident at a nearby British base – despite the actual safety situation on the island remaining stable.

Among the largest EU+ markets, airports in Italy (+4.8%) and Spain (+3.9%) posted the best results. Meanwhile, those in Germany (+3.1%), the UK (+2.8%) and France (+1.2%) underperformed the industry average, in large part due to damaging national aviation taxes.

Within the **Non-EU+ market**, the highest passenger traffic increases came from airports in North Macedonia (+36.3%), Moldova (+25.3%), Bosnia & Herzegovina (+21.3%), Uzbekistan (+15.9%), followed by Türkiye and Serbia (both at +11.3%).

DIVERGENCES ACROSS MAJORS

Amongst **the Majors³**, **Istanbul (+7.7%)** and **Istanbul Sabiha Gökçen (+7.2%)** posted the best passenger traffic performance in March. The Turkish hubs were closely followed by **London Heathrow (+6.9%)** who was the busiest European airport with 6.64 million passengers.

Spanish hubs also posted dynamic growth with **Barcelona (+5.4%)** ahead of **Madrid (+4.2%)**. Growth was more modest at **Frankfurt (+2.1%)**, **Munich (+1.4%)** and **Amsterdam (+1.4%)** – while volumes declined slightly at **London Gatwick (-2.5%)** and **Rome-Fiumicino (-0.1%)**.

SMALL AIRPORTS STILL WAY BEHIND PRE-COVID

Small airports (under 1 million passengers) continued to deliver the most contrasted results in March – as has been the case over previous months. While that segment achieved the best passenger traffic performance overall with an increase of **+8.9%** compared to the same month last year, they kept faring the worst when compared to pre-pandemic (2019) volumes at **-32.1%**.

FREIGHT AND MOVEMENTS

Unlike passenger traffic, **Freight traffic** is where the impact of the conflict in the Middle East was most visible – as large volumes of cargo usually arrive in Europe via Middle Eastern hubs. Accordingly, freight volumes at European airports decreased by **-3.1%** in March. This stands in stark contrast to results achieved in January (+6.4%) and February (+8.9%).

Aircraft movements increase somewhat slowed down at +1.3% compared to preceding month (February at +2%).

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 +3.2%, +4.8%, +1.9%, +5.6% and +8.9% as compared to the preceding year.

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

Majors: Istanbul IST (+7.7%), Istanbul SAW (+7.2%), London LHR (+46.9%), Barcelona BCN (+5.4%), Madrid MAD (+4.2%).

Mega airports: Copenhagen CPH (+16.2), Dublin DUB (+11%), Paris ORY (+10%), Málaga AGP (+9.5%), Antalya AYT (+9.2%).

Large airports: Ankara ESB (+19.6%), Tashkent TAS (+15.9%), Izmir ADB (+15.3%), Linate LIN (+14.2%), Napoli NAP (+12.7%).

Medium airports: Reus REU (+275.5%), Bratislava BTS (+162.9%), Zadar ZAD (+78.1), Trapani TPS (+41.7%), Skopje SKP (+36.6%).

Small airports: Córdoba ODB (+4007.4%), Bucharest BBU (+530.1%), Vaxjo VXO (+452.5%), Jönköping JKG (+400.5%), Stockholm BMA (+286.4%).

¹ EU, EEA, Switzerland and the UK.

² Albania, Armenia, Azerbaijan, Belarus, Bosnia & Herzegovina, Georgia, Israel, Kazakhstan, Kosovo, Moldova, Montenegro, North Macedonia, Russia, Serbia, Turkey, Ukraine, and Uzbekistan.

³ Airports over 40 million passengers.

ENDS

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.