

## Passenger traffic up +2.6% in first half of 2026

### ACI EUROPE

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**Brussels, 30 July 2026:** European airport trade body ACI EUROPE today released its air traffic report for the month of June, second quarter (Q2) and the first half (H1) of 2026.

**Passenger traffic across the European airport network** increased by **+2.6%** in **H1** compared with the same period last year.

The pace of growth markedly slowed down in **Q2 (+1.3%)** versus **Q1 (+4.3%)**, reflecting the impact of the war in the Middle East with much decreased traffic to the Region and some airlines cutting capacity in response to higher jet fuel prices.

As a result and for the first time since the recovery from the Covid-19 pandemic, **domestic passenger traffic (+3%)** outperformed **international passenger traffic (+2.5%)** in H1.

Airports in both the EU+ market<sup>1</sup> (+2.6%) and non-EU+ market<sup>2</sup> (+2.5%) saw passenger traffic increasing at a similar pace in H1, with the EU market (+3.2%) overperforming.

**Olivier Jankovec, Director General of ACI EUROPE** said: *"There is no escaping the fact that geopolitics have increasingly been shaping traffic performance this year. Growth has clearly lost momentum, with passenger traffic stalling – or even declining – in a number of national markets as of June. Importantly, this is more a story of supply shocks and pressures rather than weakening demand. Europeans continue to prioritise air travel while North Americans continue to visit our continent in record numbers this summer."*

*"Looking ahead, fixing the Schengen Entry/Exit System must be Europe's immediate priority. Long, unpredictable and unacceptable waiting times at border control have started acting as a deterrent to travel – and undermine the standing and reputation of Europe as an efficient and welcoming destination."*

*"Beyond that, the evolution of the war in the Middle East – and its operational as well as macro-economic repercussions – will largely determine the trajectory of European air traffic through the remainder of the year. European aviation is definitely operating in a far more volatile environment than in the decade before the pandemic."*

### STARK NATIONAL DIVERGENCES WIDE-SPREAD

In **the first half of 2026**, the best national performances for passenger traffic in **the EU+ market** came from airports in Slovakia (+101.3%), Malta (+15.6%), and Slovenia (+14.7%) – while airports

in Iceland (-7.1%), Cyprus (-4.4%), Austria (-2.6%) posted the weakest results.

Amongst the largest EU+ markets, Italy (+4.2%) and Spain (+3.7%) were the most dynamic. France (+0.6%) and the UK (+0.4%) posted limited gains while Germany (-1.2%) remained negative.

Meanwhile, airports in **the non-EU+ market** also recorded wide divergences in passenger traffic performance – reflecting both varying exposure to geopolitics across national markets and stronger underlying demand growth in less mature aviation markets.

This resulted in airports in North Macedonia (+27.9%), Moldova (+21%), Albania (+17.2%), Uzbekistan (+15.7%), Armenia (+11%) and Montenegro (+10.4%) posting impressive results — while those in Israel (-19.2%), Azerbaijan (-3%), Georgia (-2.5%) and Kosovo (-1.5%) experienced decreases. The dynamic for airports in the major market of Türkiye (+2.8%) remained positive.

## **AIRPORT MARKET SEGMENTS**

**Major airports (over 40 million passengers)** grew at the slowest pace in **H1** with their passenger volumes increasing by just **+0.8%** over the same period last year:

- London Heathrow remained the busiest European airport, welcoming a record 40 million passengers – a +0.2% increase over the H1 2025. The British hub kept being closely followed by Istanbul (39.84 million passengers | +1.6%).
- Istanbul Sabiha Gökçen (+6.4%) and two Spanish hubs Barcelona (+4.4%) and Madrid (+4.2%) stood out in terms of dynamic increases.
- London-Gatwick (-5.2%), Munich (-4.2%) and Frankfurt (-0.8%) underperformed while Amsterdam-Schiphol (-0.3%), Paris-CDG (-0.2%) and Rome-Fiumicino (+0.3%) were essentially flat.

**Mega airports (25-40 million passengers)** saw passenger volumes increasing by **+1.9%**, with the best performances coming from Copenhagen (+6.8%), Malaga (+6.7%) and Dublin (+5.9%).

**Large airports (10-25 million passengers)** and **Medium airports (1-10 million passengers)** grew at **+3.9%** and **+3.7%** respectively, largely driven by selective Low Cost Carrier expansion and the resilience of leisure and VFR<sup>3</sup> demand:

- The top five Large airports all achieved double-digit growth: Tirana (+17.2%), Tashkent (+16.9%), Malta (+15.6%), Kraków (+15.1%) and Milan-Linate (+10.3%).
- Meanwhile, Bratislava (+122.7%), Skopje (+28.6%), Trapani (+28.3%), Varna (+21.2%) and Chişinău (+21%) were amongst the fastest growing Medium airports.

**Small airports (less than 1 million passengers)** were the fastest growing segment year-on-year, with their passenger traffic increasing by **+8.6%**. However, these airports remain the only ones not having recovered their pre-pandemic (H1) passenger levels (-33.2%).

## **FREIGHT AND AIRCRAFT MOVEMENTS**

**Freight traffic across the European airport network** remained stable year-on-year in **H1** at **+0.7%**. When compared to pre-pandemic (H1 2019) volumes, freight volumes stood at +11.2%.

Amongst the top 10 European airports for freight traffic, the best results compared to last year came from Leipzig (+12.7%), Istanbul (+10.8%) and Amsterdam (+10%). Paris-CDG registered the steepest decrease in freight shifted year-on-year (-30.7%).

Aircraft movements in H1 increased by +1% compared to the same period last year and remained at -1.5% below pre-pandemic (H1 2019) levels.

## **DATA BY AIRPORT GROUPS**

In **H1 2026**, 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 -0.8%, -1.9%, +3.9%, +3.7% and +8.6% as compared to H1 2025.

The airports that reported the most dynamic growth in passenger traffic versus H1 2025 are as follows:

- **Majors:** Istanbul SAW (+6.4%), Barcelona BCN (+4.4%), Madrid MAD (+4.2%), Istanbul IST (+1.6%), Rome FCO (+0.3%).
- **Mega airports:** Copenhagen CPH (+6.8%), Malaga AGP (+6.7%), Dublin DUB (+5.9%), Zurich ZRH (+5.6%), Athens ATH (+4.5%).
- **Large airports:** Tirana TIA (+17.2%), Tashkent TAS (+16.9%), Malta MLA (+15.6%), Krakow KRK (+15.1%), Milan LIN (+10.3%).
- **Medium airports:** Bratislava BTS (+122.7%), Skopje SKP (+28.6%), Trapani TPS (+28.3%), Varna VAR (+21.2%), Chişinău RMO (+21.0%).
- **Small airports:** Stockholm BMA (+518.8%), Bucharest BBU (+286.3%), Logroño-Agoncillo RJL (+69.6%), Beja BYJ (+55.5%), Växjö-Kronoberg VXO (+47.9%).

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<sup>1</sup> EU, EEA, Switzerland and the UK.

<sup>2</sup> Albania, Armenia, Azerbaijan, Belarus, Bosnia & Herzegovina, Georgia, Israel, Kazakhstan, Kosovo, Moldova, Montenegro, North Macedonia, Russia, Serbia, Türkiye, Ukraine, and Uzbekistan.

<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: [corise.nel@aci-europe.org](mailto: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.

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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.