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Passenger traffic increases by +3.2% in September

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Brussels, 17 November 2026: European airport trade body, ACI EUROPE, today released its traffic report for September & the third quarter (Q3) of 2026.

Passenger traffic across the European airport network increased by **+3.2% in September** when compared to the same month last year. **Q3** tracked a similar growth trajectory at **+3.4%** over the same period last year.

Airports in the **non-EU+ market**[1] kept outperforming in September, growing by **+5.1%** year-on-year – whereas those in the **EU+ market**[2] saw volumes expanding by **+2.8%**.

Olivier Jankovec, Director General of ACI EUROPE commented: "*September saw European airports maintaining their growth momentum, partly reflecting the extension of the peak travel season well into that month – and confirming that air travel demand has remained remarkably resilient over the Summer in the face of continued geopolitical and economic headwinds. As in previous months, the gap in performance between national markets remains significant due to diverse macro-economic conditions and exposure to geopolitical risks.*"

"*Looking ahead, the traffic outlook is becoming decidedly more challenging. Airlines are now moving beyond the tactical capacity adjustments towards more structural cuts for the Winter season, as persistently high jet fuel prices continue to weigh on their finances – with the impact set to intensify due to diminishing hedging coverage. Airline seat capacity across European airports is set to increase by just +1.6% this Winter, compared with +6.3% last year. At the same time, rising air fares and a renewed cost of living crisis will test the resilience of demand for air travel.*"

"For airports, the coming months will therefore be about navigating an increasingly constrained market, with higher traffic risks and even fiercer competition between airports not just to attract but also retain airline capacity."

GEOPOLITICS & AVIATION TAXES WIELD UNEVEN PRESSURES ON NATIONAL MARKETS

September saw continued disparities in national and individual airport markets performance – reflecting a mix of factors including uneven pressures from geopolitics and aviation taxes along with the primacy of generally resilient leisure and VFR demand and fierce airport competition.

Within the **EU+ market**, airports in Slovakia (+74.6%), Slovenia (+16.6%), Estonia (+13.4%), Malta (+12.1%), Hungary (+9.5%), and Poland (+8.1%) all posted dynamic increases in passenger volumes.

At the other end of the spectrum, those in Austria (-6.3%), Iceland (-5.5%), Latvia (-1%), France (-0.5%), and Cyprus (-0.2%) went into negative territory.

Amongst the largest EU+ markets, airports in the tourism-driven markets of Italy (+6.4%) and Spain (+4.2%) delivered the strongest performances, contrasting sharply with those in the UK (+1.2%), Germany (+0.1%) and France, against a backdrop of challenging macro-economic conditions and heavy aviation taxation.

Within the **Non-EU+ market**, the highest passenger traffic increases came from airports in Montenegro (+26.4%), North Macedonia (+25.2%), Albania (+21.3%), Armenia (+18.7%), Moldova (+17.9%), and Israel (+13.6%).

Airports in the major market of Türkiye (+3.5%) underperformed the Non-EU+ market average (+5.1%) – reflecting both their exposure to Middle East markets and the country's economic headwinds.

ISTANBUL CONFIRMS TOP POSITION & MADRID BECOMES 3rd BUSIEST EUROPEAN AIRPORT

Istanbul consolidated its position as the busiest European airport in September with 7.85 million passengers (+2.8%), ahead of capacity-constrained **London Heathrow** (7.18 mpax | -2.3%).

In another significant change in the top 5 league, **Madrid** (6.31 mpax | +6.6%) climbed to the third place, overtaking **Paris-CDG** (6.22 mpax | +1.5%) which slipped to fourth. The French hub was closely followed by **Amsterdam-Schiphol** (6.21 mpax | +2%).

Amongst **the Majors** (airports with more than 40 million passengers), **Istanbul Sabiha Gökçen** (4.79 mpax | +8.4%) posted the best performance.

CONTRASTING PERFORMANCES AT LARGEST ULTRA-LCC BASES

While airports relying on Ultra-Low-Cost Carrier bases often experienced exponential growth in passenger traffic post-COVID 19, September revealed contrasting performances due to increased competitive pressures and the impact of aviation taxes.

Apart from **Istanbul Sabiha Gökçen** (+8.4%), this resulted in **London-Luton** (+7.3%), **Milan-Bergamo** (+6.9%) and **London Stansted** (+6.4%) posting dynamic growth rates – while **Brussels Charleroi** (-4.1%) and **Paris-Beauvais** (-5%) saw volumes decreasing.

SMALL AIRPORTS STILL BEHIND PRE-COVID RESULTS

Small airports (under 1 million passengers) also delivered contrasting results in September – as is the case ever since the COVID-19 crisis.

When compared to the same month last year, small airports expanded by **+3.9%**, however they kept faring the worst when compared to pre-pandemic (2019) volumes (**-24.3%**).

FREIGHT AND MOVEMENTS

Freight traffic across the European airport network grew by **+3%** in September and stood at +16.8% when compared to pre-pandemic (2019) levels.

Amongst Europe's top 10 airports for freight traffic, **Leipzig** (+13.2%) grew the fastest in September, while **Istanbul IST** kept its pole position in absolute terms. **Cologne/Bonn** (+8.4%), **Paris-CDG** (+8.3%) and **Amsterdam-Schiphol** (+7.6%) also posted dynamic increases.

Aircraft movements increased by **+1.9%** in September, standing at +4% over pre-pandemic (2019) levels.

DATA BY AIRPORT GROUPS

In September, 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 +1.7%, +0.8%, +4.4%, +5.6% and +3.9% as compared to the preceding year.

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

Majors: Istanbul SAW (+8.4%), Madrid MAD (+6.6%), Istanbul IST (+2.8%), Barcelona BCN (+2.6%), Amsterdam AMS (+2.0%).

Mega airports: Málaga AGP (+6.8%), London Stansted STN (+6.4%), Milan Malpensa MXP (+4.5%), Copenhagen CPH (+4.1%), Athens ATH (+3.5%).

Large airports: Tirana TIA (+21.3%), Krakow KRK (+15.5%), Venice VCE (+14.6%), Tel Aviv TLV (+14.0%), Tashkent TAS (+13.7%).

Medium airports: Van VAN (+766.6%), Bratislava BTS (+89.2%), Podgorica TGD (+44.2%), Newcastle NCL (+41.2%), Trapani TPS (+32.0%).

Small airports: Kozani KZI (+407.9%), Stockholm Bromma BMA (+398.3%), Logroño RJL (+159.9%), Bucharest BBU (+123.0%), Valladolid VLL (+73.1%).

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

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

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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.

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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.