

ACI EUROPE

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Europe's airports report passenger traffic growth of 9% during H1

For immediate release

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Brussels, 10 August 2017: European airport trade body, ACI EUROPE today released its air traffic report for **June, Q2 & H1**. The report is the only air transport report which includes all types of civil aviation passenger flights: full service, low cost and charter. It reveals that during the first half of this year (H1), **passenger traffic** at Europe's airports grew by an average **+9.0%**.

This impressive growth in passenger traffic was driven by a mix of one-off factors and more structural ones. These include markets affected by terrorism last year bouncing back, the return of strong passenger demand in Russia and to a lesser extent in Turkey, continued improvement in the economy and oil prices consistently remaining below \$55 per barrel.

GROWTH CONTINUING AT EU AIRPORTS & RETURNING TO NON-EU ONES

Against this background, the **EU** and **non-EU markets** ended up posting similar growth levels in passenger traffic – respectively at **+8.7%** and **+9.9%**.

In the EU, the Benelux along with Cyprus, Malta and Portugal in the South as well as Estonia, Lithuania, Poland, The Czech Republic, Hungary, Slovenia and Croatia to the East all achieved double digit growth. In the non-EU market, Albania, Georgia, Moldova, Montenegro and Ukraine each grew by well above +20%.

MAJORS IMPROVING & SECONDARY HUBS/MEDIUM SIZED AIRPORTS OUTPERFORMING

The Majors (Europe's Top 5 busiest airports) recorded a passenger traffic increase of **+4.3%** in H1 – a notable improvement over their 2016 performance (+1.6%). Amsterdam-Schiphol topped the league in terms of growth (+8.7%), followed by Paris-CDG (+5.2%), Frankfurt (+4.5%). Capacity-constrained London-Heathrow still managed to grow (+3.9%), while Istanbul-Atatürk kept regaining lost ground (-1.1%).

Stronger growth focused mainly on **secondary hubs** and **medium sized airports** – reflecting evolving competitive dynamics largely driven by Low Cost Carriers and non-EU Full Service Carriers. In this regard, the best performing airports included Keflavik (+39.7%), St Petersburg (+26%), Kiev (+29.4%), Antalya (+29.2%), Warsaw (+24.7%), Brussels (+23.4%), Larnaca (+22.7%), Lisbon (+22.3%), Prague (+21%), Naples (+20.5%), Malta (+20.2%), Bucharest (+20.4%), Porto and Faro (both +18.5%), Moscow-Sheremetyevo (+17.7%), Catania (+17.4%), Berlin-SFX (+17%), Tel-Aviv (+17.3%), Birmingham (+16%), Toulouse (+15.2%), Valencia (+15.3%) and Milan-Malpensa (+14.8%).

Accordingly, passenger traffic losses were largely concentrated on **smaller airports** (with less than 5 million passengers per annum).

Olivier Jankovec, Director General of ACI EUROPE commented "For Europe's airports, *this is by far the best first half-year traffic performance in more than 10 years. And this comes on top of significant growth - passenger volumes have expanded by close to 30% since 2012.*

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This kind of growth has clearly outstripped the most optimistic forecasts – something that should be borne in mind by anyone who doubts the looming airport capacity crunch facing Europe.”

He added *“The outlook is very positive for the rest of the year with the economy – especially in the Eurozone - expected to maintain its growth trajectory and oil prices set to remain contained. Of course, this is assuming there are no new geopolitical upsets. Having said that, Brexit remains the number one worry for many airport CEOs – given the continued uncertainty surrounding negotiations. The countdown to March 2019 keeps ticking and if no progress is achieved in the coming months, we are likely to see negative impacts on aviation kick in already next year.”*

FREIGHT TRAFFIC SURGES & AIRCRAFT MOVEMENTS UP

Freight traffic across the European airport network improved markedly during H1 at **+8.7%** - also reflecting improved economic conditions not just in Europe but globally. This is the best first half-year performance since 2010. **Aircraft movements** were up **+3.7%**, with airlines deploying significant capacity into the market.

TOP PERFORMERS DURING H1

During **H1**, airports welcoming more than 25 million passengers per year (Group 1), airports welcoming between 10 and 25 million passengers (Group 2), airports welcoming between 5 and 10 million passengers (Group 3) and airports welcoming less than 5 million passengers per year (Group 4) reported an average adjustment **+6.0%**, **+12.3%**, **+10.8%** and **+9.9%**.

The airports that reported the highest increases in passenger traffic are as follows:

GROUP 1: Moscow SVO (**+17.7%**), Manchester (**+12.6%**), Moscow DME (**+10.1%**), London LGW (**+9.4%**) and Amsterdam (**+8.7%**)

GROUP 2: Antalya (**+29.2%**), St Petersburg LED (**+26.0%**) Warsaw WAW (**24.7%**), Brussels (**+23.4%**) and Lisbon (**+22.3%**)

GROUP 3: Keflavik (**+39.7%**), Kiev KBP (**+29.4%**), Larnaca (**+22.7%**), Naples (**+20.5%**), Malta (**+20.2%**)

GROUP 4: Bucharest BBU (**+488.1%**), Nis (**+366.3%**), Kutaisi (**+92.2%**), Craiova (**+85.8%**) and Batumi (**73.7%**)

TOP PERFORMERS DURING JUNE

During the month of **June**, average passenger growth was **+10.1%**. Freight reported an exceptional increase of **+8.8%** and movements were up **+4.6%**.

Airports welcoming more than 25 million passengers per year (Group 1), airports welcoming between 10 and 25 million passengers (Group 2), airports welcoming between 5 and 10 million passengers (Group 3) and airports welcoming less than 5 million passengers per year (Group 4) reported an average adjustment **+6.3%**, **+14.4%**, **+10.7%** and **+13.1%**.

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For June, the airports which reported the highest increases in passenger traffic are as follows:

GROUP 1: Moscow SVO (+19.0%), Zurich (+10.6%), Barcelona (+9.2%), Manchester (+9.1%) and Moscow DME (+8.3%)

GROUP 2: Antalya (+76.2%), St Petersburg LED (+23.8%), Lisbon (+21.0%), Tel Aviv & Warsaw WAW (+20.4%) and Ankara (+19.6%)

GROUP 3: Naples (+29.9%), Kiev KBP (+23.8%), Keflavik (+21.8%), Larnaca (+17.8%) and Malta (+17.4%)

GROUP 4: Nis (+374.1%), Batumi (+192.0%), Bucharest BBU (+190.2%), Eindhoven (+129.4%) and Foggia (+123.8%)

The 'ACI EUROPE Airport Traffic Report – June, Q2 & H1 2017' includes 252 airports in total representing more than 88% of European air passenger traffic.

ENDS

ACI EUROPE is empowering you to have better access to our traffic data! We have just released a new, free tool that puts the latest airport traffic data at your fingertips, enabling you to make the customised comparison tables & graphs that can be downloaded and shared via email or social media.

To access our **Airport Traffic Analyser App**, go to www.aci-europe.org/trafficapp

Notes to Editors

The ACI EUROPE Airport Traffic Report is a dedicated service for journalists available in the password protected 'Airport Traffic Report' section of the 'Media room' on our website www.aci-europe.org. Accredited members of the media may also access additional traffic analysis and comprehensive traffic databases. For your password to access these sections, please contact us by e-mail at: maria.karananou@aci-europe.org. Your request will be validated and the password will be e-mailed to your work address.

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*ACI EUROPE is the European region of Airports Council International (ACI), the only worldwide professional association of airport operators. ACI EUROPE represents over **500 airports** in 45 European countries. These airports contribute to the employment of **12.3 million people**, generating **€675 billion each year (4.1%) of GDP** in Europe.*

EVERY FLIGHT BEGINS AT THE AIRPORT.