

ACI EUROPE

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Q1 brings further gains in air traffic, with passengers up 7.6%

For immediate release

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Brussels, 8 May 2018: European airport trade body, ACI EUROPE today released its air traffic report for March and **Q1**. 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 quarter of this year, **passenger traffic** at Europe's airports grew by an average **+7.6%**.

NON-EU AIRPORTS OUTPERFORMING

Passenger traffic in the **Non-EU** market significantly outperformed the European average during Q1 - at **+12.9%**. This was mainly driven by rapidly increasing volumes at airports in Turkey, Ukraine, Israel, Georgia and Iceland – and to lesser extent in Russia, Moldova and Belarus.

Apart from Istanbul-Atatürk (see below), the highest increases in passenger traffic were notably achieved by Ankara (+41.3%), Tbilisi (+37%), Tel Aviv (+19.5%), Istanbul-Sabiha Gocken (+18.5%), Antalya (+16.7%), Kiev (+15.3%), Izmir (+15.1%) and Keflavik (+14.3%).

EU AIRPORTS STILL REPORTING ROBUST GROWTH

Meanwhile, the **EU market** maintained a dynamic growth trajectory with passenger traffic increasing by **+6.2%** during Q1. Some 14 EU national markets recorded double-digit growth - mostly in the Eastern and Southern parts of the bloc, along with Finland and Luxembourg.

Accordingly, the following capital airports posted significant results: Malta (+19.4%), Riga (+19.4%), Luxembourg (+18.8%), Bratislava (+18.6%), Vilnius (+17.1%), Budapest (+16.9%), Lisbon (+15.8%), Warsaw (+14.7%), Ljubljana (+14.2%), Zagreb (+13.8%), Larnaca (+12.8%), Helsinki (+12.3%) and Prague (+12.4%).

Conversely, passenger traffic at UK, German, Danish and Swedish airports grew at the slowest pace – in large part reflecting the impact of the bankruptcies of Monarch and Air Berlin and/or limited economic growth.

MAJORS & REGIONALS

Passenger traffic at **the Majors** (top 5 European airports) grew by an impressive **+9.6%** during Q1.

Istanbul-Atatürk led the league with passenger growth of +21.5%. This propelled the Turkish hub from the 5th to the 3rd position of the busiest European airports (compared to full year 2017) - snapping at the heels of Paris-CDG (+4.6%). Frankfurt (now in 5th position) grew by +10% on the back of both low cost carrier (LCC) expansion and a strong hub airline, while Amsterdam-Schiphol (4th position) expanded by +8.2%. London-Heathrow's remained in the top position, but continued to grow at the slowest pace (+3.1%) due to capacity constraints.

Many **regional airports** achieved particularly impressive growth – often capitalising on their off-season potential as leisure destinations and yielding the results of proactive route development & marketing. These included: Varna (+90.8%), Naples (+46.1%), Heraklion (+41.2%), Sevilla (+30%),

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Valencia (+28.3%), Ibiza (+24.6%) Dubrovnik (+23.8%), Olbia (+23.8%), Krakow (+20.9%), Palermo (+20.4%), Nantes (+18.6%), Strasbourg (+16.2%), and Brindisi (+14.6%).

Freight traffic during Q1 was up **+4.5%**, while **Aircraft movements** (an indicator of new airline capacity in the market) were up **+3.7%**.

Olivier Jankovec, Director General of ACI EUROPE said " *The momentum for continued passenger traffic growth is holding on. While economic growth is set to remain strong in Europe this year, its pace should moderate somehow – with slower freight traffic appearing to give credence to that. For now, the most significant downside risks for air traffic are coming from rising oil prices, trade disputes and Brexit.*"

During **Q1**, 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 **+7.1%**, **+7.7%**, **+9.2%** and **+8.3%**.

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

GROUP 1: Istanbul IST (**+21.5%**), Istanbul SAW (**+18.5%**), Antalya (**+16.5%**), Lisbon (**+15.8%**) and Moscow SVO (**+11.9%**)

GROUP 2: Ankara (**+41.3%**), Tel Aviv (**+19.5%**)
Budapest (**16.9%**), Kiev (**+15.3%**) and Izmir (**+15.1%**)

GROUP 3: Naples (**+46.1%**), Heraklion (**+41.2%**), Sevilla (**+30%**), Valencia (**+28.3%**), Ibiza (**+24.6%**)

GROUP 4: Varna (**+90.8%**), Batumi (**+55.1%**),
Lublin (**+54.1%**), Craiova (**+52.5%**) and Kefallinia (**+43.3%**)

MARCH FIGURES

During the month of **March**, average **passenger growth** was **+8.9%** - benefitting from the Easter break starting at the end of the month rather than in April. EU airports grew by **+7.9%** and non-EU ones by **+12%**.

Freight traffic reported an increase of **+1.1%** - the slowest gain in 2 years. **Aircraft movements** were up **+3.5%**.

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 **+8.5%**, **+9.3%**, **+10.3%** and **+7.7%**.

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

GROUP 1: Antalya (**+23.8%**), Istanbul IST & Lisbon (**+17.2%**), Istanbul SAW (**+14.6%**), Palma De Mallorca (**+14.7%**) and Moscow SVO (**+13.4%**)

GROUP 2: Ankara (**+37.5%**), Tel Aviv (**+23.7%**), Kiev (**+21.1%**), Budapest (**+17.8%**) and Porto (**+15.4%**)

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GROUP 3: Heraklion (+**52.9%**), Naples (+**45.4%**), Ibiza (+**33.2%**), Valencia (+**28.7%**) and Nantes (+**26.8%**)

GROUP 4: Kefallinia (+**95.5%**), Varna (+**90.1%**), Lublin (+**61.9%**), Split (+**58%**) and Caen (+**49.1%**)

The '**ACI EUROPE Airport Traffic Report – March & Q1 2018**' includes 238 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

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: biljana.banjac@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. Our members facilitate over 90% of commercial air traffic in Europe: **2 billion passengers, 20 million tonnes of freight** and **23.7 million aircraft movements** in 2016. 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.