

ACI EUROPE

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Steady passenger traffic growth of 6.7% at Europe's airports during H1

For immediate release

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Brussels, 9 August 2018: European airport trade body, ACI EUROPE today released its air traffic report for **June, Q2 & H1**, revealing that during the first half of this year (H1), **passenger traffic** at Europe's airports grew by an average **+6.7%**.

GROWTH DYNAMIC CONTINUING, BUT AT TWO SPEEDS

Passenger traffic in the less mature **non-EU market** increased by **+10.5%** - nearly twice the expansion rate of the **EU market: +5.4%**. Both markets saw the growth dynamic recede slightly in Q2 over Q1 – from +12.5% to +9.4% at non-EU airports and from +6.2% to +4.9% at EU airports.

In the EU, airports in the Baltic States, Bulgaria, Croatia, the Czech Republic, Greece, Hungary, Luxembourg, Malta, Poland, Slovakia and Slovenia achieved double digit growth. Meanwhile, airports in Sweden posted to the lowest growth within Europe (+1.5%), due to the combination of the new national aviation tax introduced last April, the bankruptcy of regional airline Nextjet and lower outbound demand in the wake of local currency hitting its lowest value in years. Sweden became the only European market losing passenger traffic in June (-0.4%), with its new aviation tax among the factors leading to the improved performance of airports in neighbouring Denmark (+5.7%).

In the non-EU market, passenger traffic grew in excess of +15% at airports in Turkey, Ukraine, Georgia and Israel and Iceland.

MAJORS IMPROVING & SECONDARY HUBS/MEDIUM SIZED AIRPORTS OUTPERFORMING

The Majors (Europe's Top 5 busiest airports) recorded a passenger traffic increase of **+6.3%** in H1 – a notable improvement over their 2017 performance (+4.3%). Istanbul-Atatürk topped the league in terms of growth (+12.9%), followed by Frankfurt (+9.1%). Amsterdam-Schiphol also reported robust growth (+5.4%), followed by Paris-CDG (+3.0% - whose performance was impacted by repeated strikes at Air France), and capacity constrained London-Heathrow (+2.6%).

Stronger growth focused mainly on **secondary & smaller hubs** as well as selected **medium sized & larger regional airports** – reflecting ever evolving competitive dynamics largely driven by Low Cost Carriers and non-EU Full Service Carriers. These airports include: Istanbul-SAW (+12.4%), Lisbon (+12.9%), Milan-Malpensa (+11.1%), Athens (+11.4%), Tel Aviv (+13.1%), Helsinki (+12%), Moscow-Vnukovo (+19.8%), Warsaw (+14.8%), Prague (+10.3%), Budapest (+14.8%), Naples (+24.7%), Keflavik (+15.6%), Valencia (+20.2%), Krakow (+17.8%), Malta (+16.3%), Sevilla (+26.9%), Palermo (+16.9%), Nantes (+14%) and Heraklion (+14.2%).

FREIGHT GROWTH FADING, BUT AIRCRAFT MOVEMENTS STILL UP

Freight traffic increased by just **+3.3%** during H1 – due to a deceleration in Q2 (+2.1%) compared to Q1 (+4.5%). Freight traffic growth in the EU was +2.4% - down from +3% in Q1.

Aircraft movements were up **+3.5%**, with airlines still deploying significant capacity into the market and little variations between Q1 and Q2.

Olivier Jankovec, Director General of ACI EUROPE commented *“Our expectations for the first half of the year were cautiously positive, not least because of the extraordinary rise in passenger traffic Europe has enjoyed last year. But the results we are issuing today reveal just how robust air traffic growth has remained so far. Such growth is clearly putting our aviation system under pressure – with the impact of both a lack of airport capacity and Air Traffic Management inefficiencies becoming more and more acute and now directly affecting air travellers.”*

He added *“Looking ahead beyond the summer, the diminishing growth in freight traffic points to the economic risks from trade disputes and their escalation. Higher prices, disrupted supply chains and wavering exports are likely implications – which would inevitably end up affecting demand for air transport. The increasing odds of a “no-deal” Brexit scenario are just adding to the stress – and could soon start weakening consumer confidence.”*

TOP 5s 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 **+6.1%**, **+6.6%**, **+7.9%** and **+7.5%**.

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

GROUP 1: Antalya (**+25.2%**), Moscow SVO (**+13%**), Lisbon & Istanbul IST (**+12.9%**), Istanbul SAW (**+12.4%**) and Frankfurt (**+9.1%**)

GROUP 2: Ankara (**+29.6%**), Moscow VKO (**+19.8%**), Kiev (**18.3%**), Warsaw WAW & Budapest (**+14.8%**) and Tel Aviv (**+13.1%**)

GROUP 3: Sevilla (**+26.9%**), Naples (**+24.7%**), Valencia (**+20.2%**), Riga (**+18.2%**) and Krakow (**+17.8%**)

GROUP 4: Foggia (**+48.5%**), Batumi (**+45.5%**), Poznan (**+39.7%**), Varna (**+37.1%**) and Lublin (**33.2%**)

TOP 5s DURING JUNE

During the month of **June**, average passenger growth was **+6.8%**. Freight reported an increase of **+1.6%** and movements were up **+3.4%**.

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 **+6.8%**, **+6.2%**, **+5.9%** and **+8.8%**.

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

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GROUP 1: Antalya (+28.1%), Moscow SVO (+15.3%), London STN (+11.3%), Frankfurt (+9.8%) and Lisbon (+9.6%)

GROUP 2: Moscow VKO (+18.2%), Kiev (+17.8%), Ankara (+17.0%), Warsaw WAW (+14.5%) and Budapest (+13.0%)

GROUP 3: Sevilla (+24.7%), Keflavik (+17.1%), Riga (+15.6%), Malta (+14.7%) and Palermo (+14.3%)

GROUP 4: Targu Mures (+845.9%), Maribor (+354.8%), Taranto (+181.2%), Kutaisi (+56.6%) and Bucharest (+49.3%)

The 'ACI EUROPE Airport Traffic Report – June, Q2 & H1 2018' includes 239 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.airporttraffic.app

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: 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. 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.