

**ACI EUROPE**

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# Q1 passenger traffic up +4.4%, freight down -1.8%

For immediate release

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**Brussels, 14 May 2019:** 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 **+4.4%**, while freight traffic declined by **-1.8%**.

**Olivier Jankovec, Director General of ACI EUROPE** commented: *"While softening compared to the past 2 years, passenger traffic remains dynamic - especially in the EU. This reflects improved economic data in the Eurozone and a more benign global economic outlook for now. But, while prospects have somehow moved from a half-empty glass to a half-full one, black spots still abound. Volatile oil prices, continued airline consolidation, ATM disruptions and increasing airport capacity constraints will limit airline capacity growth in the coming months. On the demand side, sliding imports and a risk of trade escalations are ever-present. And over the medium-term, rising concerns about aviation's environmental impact will likely add to the downward pressures."*

## **EU AIRPORTS PASSENGER TRAFFIC AT +4.8%**

The EU market kept reporting robust growth in Q1, despite March traffic (+4.1%) being affected by the Easter holidays slipping to April this year.

Airports in Austria (+21.6%) and Estonia (+13.3%) posted double-digit growth in Q1 while those in Poland, Slovakia, Romania, Greece, Ireland, Portugal, Spain and Luxembourg also grew well above the EU average. Conversely, Sweden was the only country reporting passenger traffic declining (-4.1%) mainly as a result of the country's aviation tax and fast increasing environmental pressures limiting demand. Meanwhile, passenger traffic barely grew in Denmark (+0.9%) and significantly underperformed in Belgium (+1.9%) due to ATM strikes as well as in the Netherlands (+1.8%), due to severe airport capacity limitations.

Amongst larger/capital EU airports, the best results were achieved by Berlin-TXL (+32.4%), Vienna (+24.6%), Tallinn (+13.3%), Dusseldorf (+12.5%), Milan-Malpensa (+10.6%), Palma de Mallorca (+10.2%), Athens (+9.5%) and Luxembourg (+9.3%).

## **NON-EU AIRPORTS PASSENGER TRAFFIC AT +2.9%**

Airports in the non-EU market grew at a slower pace in Q1, mainly due to traffic losses in Turkey (-3.7% - as a result of the recession affecting the country), Iceland (-8.8% - following the bankruptcy of long/medium haul budget airline WOW in the final days of March). However, passenger traffic in Russia, Ukraine, Georgia and Belarus remained extremely dynamic, achieving double-digit growth.

The best performances amongst larger/capital non-EU airports came from Moscow-Sheremetevo (+17.6%), Moscow-Vnukovo (+13.2%), Saint Petersburg (+14.7%), Minsk (+15.7%), Tbilisi (+11.2%), Kiev (+15.2%) Antalya (+13.2%) and Sochi (+12.9%).

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### WEAKER MAJORS & SMALLER REGIONALS

Passenger traffic at **the Majors** (top 5 European airports) grew by just **+1.7%** during Q1. Paris CDG (+5.7%), led the league, followed by Frankfurt (+2.5%), while gains were limited at capacity constrained Amsterdam-Schiphol (+1.6%) and London-Heathrow (+1.4%). Istanbul-Ataturk saw passenger traffic declining (-2.7%).

**Regional airports**, especially smaller ones, tended to underperform the European average in Q1. However, several achieved particularly impressive growth – boosting their off-season potential as leisure destinations and yielding the results of proactive route development & marketing. These included: Kharkiv (+28.8%), Dubrovnik (+25.4%), Paphos (+21.8%), Ostend (+21.2%), Toulon (+21%), Seville (+21.4%), Memmingerberg (+20.3%), Thessaloniki (+18.2%), Bari (+17.7%), Krakow (+16.1%), Wroclaw (+14.5%), Pau (+14.8%), Nantes (+14.2%), Faro (+12.3%) and Edinburgh (+12%).

### FREIGHT & AIRCRAFT MOVEMENTS

The decline in freight traffic in Q1 was all down to the **EU market (-2.6%)** as **non-EU** airports remained positive (**+1.8%**). However, March saw freight traffic across Europe improving slightly (-0.2%) compared to preceding months, with both non-EU (+3.3%) and EU (-1.2%) posting better results.

Amongst the top 10 European airports for freight traffic, only 4 posted positive results in Q1: Liège (+12.5%), Istanbul-Ataturk (+6.6%), Madrid-Barajas (+5.7%) and Kazan (+3.8%).

Aircraft movements increased by +3.1% in Q1, with EU airports also ahead (+3.3%) compared to non-EU ones (+2.1%) – on a slightly downward trend over the period.

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 **+4.0%**, **+5.8%**, **+4.2%** and **+3.0%**.

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

**GROUP 1:** Vienna (**+24.6%**), Moscow SVO (**+17.6%**), Antalya (**+13.2%**), Palma de Mallorca (**+10.2%**) and Dublin (**+7.6%**)

**GROUP 2:** Berlin TXL (**+32.4%**), Kiev (**+15.2%**), St Petersburg (**+14.7%**), Moscow VKO (**+13.2%**) and Dusseldorf (**+12.5%**)

**GROUP 3:** Seville (**+21.4%**), Thessaloniki (**+18.2%**), Bari (**+17.7%**), Krakow (**+16.1%**) and Nantes (**+14.2%**)

**GROUP 4:** Taranto (**+152.2%**), Kutaisi (**+101.0%**), Ohrid (**+63.9%**), Bucharest (**+55.8%**) and Caen (**+46.5%**)

### MARCH FIGURES

During the month of **March**, average **passenger growth** was **+3.8%**, even though the Easter holiday break took place in April. EU airports grew by +4.1% and non-EU ones by +2.7%.

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**Freight traffic** reported a decrease of **-0.2%** - the slowest gain in 2 years. **Aircraft movements** were up **+2.0%**.

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 **+3.5%**, **+5.0%**, **+3.9%** and **+2.1%**.

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

**GROUP 1:** Vienna (**+23.9%**), Moscow SVO (**+17%**), Antalya AYT (**+11%**), Dublin (**+8.8%**) and Paris CDG (**+7.2%**)

**GROUP 2:** Berlin TXL (**+25.1%**), Moscow VKO (**+16.9%**), St Petersburg (**+16.3%**), Kiev (**+15.6%**) and Edinburgh (**+14.8%**)

**GROUP 3:** Bari (**+40.5%**), Seville (**+21%**), Sochi (**+18.9%**), Krakow (**+17.5%**) and Valencia (**+11.9%**)

**GROUP 4:** Taranto (**+150%**), Kos (**+140.8%**), Ohrid (**+96.9%**), Kutaisi (**+82.8%**) and Foggia (**+77.8%**)

The '**ACI EUROPE Airport Traffic Report – March & Q1 2019**' 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

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.**