

ACI EUROPE

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August passenger traffic up **+3.4%** & freight down **-4%**

For immediate release

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Brussels, 10 October 2019: European airport trade association, ACI EUROPE today releases its traffic report for **August 2019**, during which average **passenger traffic** in geographical Europe climbed by **+3.4%**. While this is an improvement compared to the previous month (+2.2% in July), this remains below the performance of August 2018 (+5.1%) – reflecting generally less favourable trading conditions for Europe’s airports.

In this context, **freight traffic** decreased by **-4%** in August - remaining the most exposed to on-going trade wars and a weakening global economy. Meanwhile **aircraft movements** only expanded by **+1.4%**, reflecting airlines limiting capacity expansion & network developments, the continued grounding of the 737MAX and the impact of consolidation.

EU & NON-EU MARKETS EVEN OUT

EU airports posted an average increase of **+3.5%** in passenger traffic in August – mostly driven by international traffic (+3.9%) rather than domestic traffic (+1.3%).

The Austrian and Latvian markets achieved double digit growth, while Italy & Malta (+8.1%), Croatia (+7.8%), Luxembourg (+7.4%), Finland (+7.3%) and Portugal (+7.1%) significantly outperformed the EU average. Conversely, airports in Bulgaria (-5.4%), Sweden (-3.3%), Cyprus (+0.7%), the Netherlands (+0.2%), Germany (+1.2%) and the UK (+1.6%) came at the other end of the spectrum.

Several capital & larger EU airports achieved well above average results. Milan Malpensa’s bumper growth (+33.4%) was fueled by the traffic transferred from Milan Linate, which remains closed until 27 October for runway maintenance. Dynamic passenger growth was also booked by Vienna (+13.2%), Riga (+13.1%), Lisbon (+8%), London Luton (+7.9%), Madrid (+7.5%), Luxembourg (+7.4%), Helsinki (+6.7%) and Prague (+6.5%).

Meanwhile, passenger traffic expanded by **+3.2%** at **non-EU airports** – entirely driven by international traffic (+8%) as domestic traffic decreased sharply (-5%).

Airports in Ukraine (+25.1%), North Macedonia (+17.8%), Albania (+13%), Bosnia and Herzegovina (+12.1%) and Serbia (+12%) led the non-EU markets. But as a result of the continued fallout triggered by the bankruptcy of the ultra-low cost carrier WOW Air, Iceland took the hardest hit in the entire region (-29.4%), while Georgia (-15.3%) also suffered severe setbacks and Norway was nearly flat (-0.6%). Russian airports saw passenger traffic growing by +4.9% and those in Turkey by +2.9% - recovering from its traffic slump in July (-3.5%).

Accordingly, amongst the capital & larger non-EU airports, Kyiv Boryspil (+24.2%), Antalya (+15.3%), Tirana (+13%), Sarajevo (+12.2%), Skopje (+11.1%), Moscow Sheremetyevo (+10.6%) achieved the highest growth.

MAJORS & SMALLER REGIONAL AIRPORTS UNDERPERFORMING

Passenger growth at **the Majors** (top 5 European airports) in August was fairly limited at **+1.3%**. Paris-CDG kept leading the league (+4.3%), followed by Frankfurt (+1.7%). Istanbul-IST (+0.9%) was nearly flat, as well as capacity constrained London-Heathrow (+0.1%) and Amsterdam-Schiphol (-0.5%).

Smaller regional airports (less than 5 million passengers/annum) also underperformed at **+0.3%** reflecting the fragility of their markets when trading conditions deteriorate. 53% of them were losing traffic during August - compared to 39% for the wider European average.

Apart from Nis (+61.1%), Ohrid (+60.9%), Turku (+60.3%), Kharkhiv (+38%), Zadar (+29.6%) and Memmingerberg (+25.8%), the best performance amongst regional airports came from larger ones: Krakow (+32%), Nantes (+20.7%), Sevilla (+20.4%), Bordeaux (+14.3%), Bari (+11.5%) and Porto (+10.8%).

NON-EU MARKET IN THE LEAD ON FREIGHT

Freight traffic at EU airports dropped by **-5.9%** in August. Meanwhile, **non-EU airports** fared considerably better, averaging out at **+6.2%**. Amongst the top 10 European hubs for cargo operations, only Madrid-Barajas (+7.2%) reported expansion.

During the month of **August**, 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 **+3.2%**, **+5%**, **+3.2%** and **+1.2%**.

The airports that reported the highest increases in passenger traffic during August 2019 (compared with August 2018) are as follows:

GROUP 1: Antalya (**+15.3%**), Vienna (**+13.2%**), Moscow SVO (**+10.6%**), Lisbon (**+8%**) and Madrid (**+7.5%**)

GROUP 2: Milan MXP (**+33.4%**), Kyiv KBP (**+24.2%**), Porto (**+10.8%**), Stuttgart (**+8.4%**) and Alicante (**+8.3%**)

GROUP 3: Krakow (**+32%**), Nantes (**+20.7%**), Sevilla (**+20.4%**), Bordeaux (**+14.3%**) and Riga (**+13.1%**)

GROUP 4: Targu Mures (**+168.9%**), Taranto (**+163.6%**), Foggia (**+105%**), Nis (**+61.1%**) and Ohrid (**+60.9%**)

ENDS

Notes to Editors

Want more access to the latest airport traffic data? ACI EUROPE has developed a dedicated App providing just that. The App gives you all the usual key figures, but also enabling you to make customised comparison tables & graphs that can be downloaded and shared via email or social media. The App is available for iOS, Android and as a WebApp. To find out more, 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: **2.3 billion passengers, 21.2 million tonnes of freight** and **25.7 million aircraft movements** in 2018. In response to the Climate Emergency, in June 2019 our members committed to achieve net zero carbon emissions for operations under their control by 2050, without offsetting.*

EVERY FLIGHT BEGINS AT THE AIRPORT.