

European air passenger traffic swings to a 5% high in August

ACI EUROPE

Boulevard du Régent
37-40 (5th floor),
1000 Brussels,
Belgium
www.aci-europe.org

Brussels, 13 October 2025: European airport trade body ACI EUROPE today released its preliminary air traffic report for August 2025.

Passenger traffic across the European airport network increased **+4.9%** in **August 2025** compared with August 2024, and ahead of the year-to-date average of 4.3%, confirming that summer demand remains strong.

International passenger traffic led the growth at +5.6%, standing in contrast to domestic traffic gains (+1.6%). Overall, passenger volumes in August stood at +7% above their pre-pandemic levels (August 2019).

EU+ & REST OF EUROPE

Airports in the **EU+ area**¹ posted results below the continental average with passenger volumes increasing by **+4%**. Significant divergences in performance between individual national markets continued in August.

Three countries in the EU+ area registered double-digit growth year-on-year, namely Poland (+15.1%), Slovenia (+11.7%), and Romania (+10.3%). At the other end of the traffic performance spectrum were Latvia (-6.7%), Estonia (-4.5%), and Iceland (-2.5%).

The largest EU+ markets all posted traffic results below the continental average: Germany (+4.2%), Spain (+3.8%), Italy (+2.8%), the UK (+1.7%) and France (+1%).

Meanwhile, airports in the **rest of Europe**² have grown faster on average than their Western counterparts with an increase of **+8.8%** year-on-year. However, performance gaps in that subgroup are even more significant, reflecting the impact of both geopolitics and contrasted markets dynamics.

This resulted in airports in Moldova (+46.6%), Israel (+38.1%) and Bosnia & Herzegovina (+20.4%) growing well above the group's average — while those in Russia (-13.3%), Azerbaijan (+0.7%), Armenia (+7.2%), Uzbekistan (+7.7%) and Serbia (+7.8%) posted results below that line.

AIRPORT MARKET SEGMENTS

Major airports (over 40 million passengers) grew by **+3.5%** in August 2025 (vs. August 2024):

- Istanbul Sabiha Gökçen (+21.5%) was the fastest growing major airport in Europe, followed by Istanbul Airport (+6.8%).
- Istanbul Airport and Heathrow both surpassed the historic milestone of serving more than 8 million passengers in a single month.

Mega airports (25-40 million passengers) saw passenger volumes increasing by **+4.2%**, with the best performances coming from Milan Malpensa (+10.2%), Copenhagen (+8.6%) and Athens (+6.8%).

Strong, above the monthly average growth was posted by **Large** (10-25 million passengers), **Medium** (1-10 million passengers) and **Small** (less than 1 million passengers) airport segments, with respectively **+6.1%**, **+5.8%**, **+6.2%**, driven by Low Cost Carrier expansion and the strength of leisure and VFR³ demand, especially during the peak Summer month of August. This resulted in Medium airports growing at double-digit rate over pre-pandemic levels.

- In the Large category, the fastest growing airports all achieved double-digit growth. Notably, Poland's strong performance buoyed both Warsaw and Krakow airports to the top 5.
- Amongst Medium airports, Chisinau led the pack with an impressive +46.6% growth.
- Airports topping the Small airports rank recorded triple-digit growth rates year-on-year: Antwerp (+769.4%), Bucharest (+118.6%) and Syros Island (+105.3%).

Small airports, despite achieving a positive momentum, remained the only ones not having recovered their pre-pandemic passenger levels (-20.1%).

FREIGHT AND AIRCRAFT MOVEMENTS

Freight traffic across the European airport network decreased by **-5.8%** in August. When compared to pre-pandemic volumes, freight stood at +7%.

Amongst the top 10 European airports for freight traffic, the best results compared to last year came from Liège (+29%), Madrid (+11.4%), and Milan Malpensa (+6%).

Aircraft movements in August increased by +3.3% compared to the same period last year.

DATA BY AIRPORT GROUPS

The airports that reported the most dynamic growth in passenger traffic in August 2025 versus August 2024 are as follows:

Majors: Istanbul SAW (+21.5%), Istanbul IST (+6.8%), Barcelona BCN (+4.7%), Munich MUC (+4.7%), Frankfurt FRA (+4.1%).

Mega airports: Milan MXP (+10.2%), Copenhagen CPH (+8.6%), Athens ATH (+6.8%), Zurich ZRH (+5.5%), Dublin DUB (+4.1%).

Large airports: Tel Aviv TLV (+38.1%), Krakow KRK (19.6%), Izmir ADB (+19.2%), Warsaw WAW (+15.6%), Tirana TIA (+13.5%).

Medium airports: Chişinău RMO (+46.6%), Bournemouth BOH (+32.1%), Trieste TRS (+27.3%), Gaziantep GZT (+26.1%), Wrocław WRO (+22.9%).

Small airports: Antwerp ANR (+769.4%), Bucharest BBU (+118.6%), Syros Island JSY (+105.3%), Córdoba ODB (+71.7%), Kastamonu KFS (+70.5%).

¹ EU, EEA, Switzerland and the UK.

² Albania, Armenia, Azerbaijan, Belarus, Bosnia & Herzegovina, Georgia, Israel, Kazakhstan, Kosovo, Moldova, Montenegro, North Macedonia, Russia, Serbia, Turkey, Ukraine, and Uzbekistan.

³ Visiting Friends and Relatives.

ENDS

ACI EUROPE Airport Traffic Reports are the only air transport reports to include all types of airline passenger flights to, from and within Europe: full service, low cost, charter and others.

The monthly figures will be revised as more airports submit data. The preliminary report is based on a sample of around 450 airports, who submit data within 4 weeks of month end. The definitive report is based on data from 650 airports.

The ACI EUROPE Airport Traffic Reports are a dedicated service for ACI EUROPE members and accredited journalists, available in the password protected sections of the 'Media Room' and the 'Members Room' on our website www.aci-europe.org.

For your password to access these sections, please contact us by e-mail at: natalia.sirbu@aci-europe.org. Your request will be validated, and the password will be e-mailed to your work address.

The report presents data for ACI EUROPE Members and might not be representative of the total European airport traffic.

For more information, contact:

Agata Lyznik
Director of Communications, Media & Events
Tel: +32 2 552 09 89
Email: agata.lyznik@aci-europe.org

About ACI EUROPE

ACI EUROPE is the European region of Airports Council International (ACI), the only worldwide professional association of airport operators. ACI EUROPE represents over 600 airports in 55 countries. Our members facilitate over 95% of commercial air traffic in Europe. Airports and air connectivity support 14 million jobs, generating €851 billion in European economic activity (5% of GDP). In response to the Climate Emergency, in June 2019 our members committed to achieving Net Zero carbon emissions for operations under their control by 2050, without offsetting.