

ACI EUROPE

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Passenger traffic at +2.1% & Freight at -2.6% in October

For immediate release

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Brussels, 17 December 2019: European airport trade body, ACI EUROPE today released its latest air traffic report for **October 2019**, measuring all of commercial aviation flights: full service, regionals, low cost and charter.

Passenger traffic across the European airport network increased by **+2.1%** in October. Although only a notch down from September (+2.2%), this marks the weakest monthly performance so far in 2019.

Meanwhile, **freight traffic** kept falling for the 12th consecutive month at **-2.6%** (compared with -2.8% in September) and **aircraft movements** turned negative for the first time this year at **-0.5%**.

NON-EU MARKET LEADING TRAFFIC GROWTH

The increase in European passenger traffic was largely driven by **non-EU airports** at **+4.6%**, an improvement over September (+3%).

Such performance reflected double-digit increases at airports in Ukraine, Montenegro, North Macedonia, Albania, Bosnia-Herzegovina, Serbia, Israel and Armenia – as well as growth (although more moderate) at airports in Russia, Moldova and Turkey. Conversely, passenger traffic kept falling in Iceland following the bankruptcy of WOW last Spring, with Keflavik airport (-34.6%) experiencing a massive decrease. Airports in Switzerland and Georgia also posted (much smaller) decreases in passenger traffic, while Norwegian airports experienced weak growth.

Accordingly, the best passenger traffic performances came from the following capital & larger non-EU airports: Kyiv-Boryspil (+22.3%), Tirana (+20%), Tel Aviv (+15%), Antalya (+14.8%), Yerevan (+14.8%), Sarajevo (+14.3%), Moscow-Vnukovo (+14.2%), Belgrade (+13.5%) and Skopje (+13.1%).

CAPACITY RESTRAINT & AIRLINE FAILURES LIMIT EU MARKET GAINS

Passenger traffic growth at **EU airports** kept moderating in October, only increasing by **+1.3%** (down from +2% the previous month).

This reflected airlines generally limiting capacity expansion, industrial action in Germany & Italy – as well as the full impact of the collapse last September of Aigle Azur, XL Airways, Adria Airways and Thomas Cook. These airline failures particularly hit Ljubljana (-38.5%), East Midlands (-13.9%), Glasgow (-13%), Paris-Orly (-12.4%), Newcastle (-7.5%) Birmingham (-3.6%) and airports serving the Canary islands (-6% collectively for Las Palmas, Tenerife North, Tenerife South, Fuerteventura & Lanzarote).

Poland, Estonia and Croatia were the only EU markets where airports achieved double-digit increases in passenger traffic – with airports in Hungary, Austria, the Czech Republic, Luxembourg, Malta, Latvia and Lithuania also seeing dynamic growth. Apart from Slovenia, airports in the UK, Germany, Sweden, Slovakia and Bulgaria posted passenger traffic losses – while those in France, the Netherlands and Denmark registered only marginal gains.

Amongst capital & larger EU airports, the highest increases in passenger volumes came from: Tallinn (+11.2%), Vienna (+10.2%), Budapest (+9.8%), Luxembourg (+9.7%), Riga (+9.3%), Malta (+8.6%), London-Luton (+8.4%), Warsaw (+8.2%) and Prague (+8.1%).

MAJORS SLIGHTLY IMPROVING & SMALLER REGIONALS DETERIORATING

Passenger traffic at **the Majors** (top 5 European airports) in October stood just below the industry average at **+1.8%**, slightly improving over the previous month (+1.2%). Paris-CDG once again achieved the best performance (+4.1%), closely followed by Istanbul (+3.3%) whose performance improved compared to September. Frankfurt (+1%) as well as capacity constrained London-Heathrow (+0.5%) and Amsterdam-Schiphol (+0.3%) grew at a slower pace.

Meanwhile, the performance of **smaller regional airports** (less than 5 million passengers) kept worsening at **-1.3%** (from -0.7% in September). **54%** of them lost passenger traffic during October, compared to just 33% for the rest of the airport industry.

Amongst smaller regional airports, the highest increases came from: Kharkiv (+69.6%), Kutaisi (+44.6%), Nis (+43.9%), Zadar (+41.8%), Turku (+38.3%), Tivat (+33.1%), Memmingerberg (+25%) and Dubrovnik (+22.7%). Amongst larger ones (more than 5 million passengers), Krakow (+30.4%), Sevilla (+14.8%) and Bordeaux (+14.3%) came on top.

FREIGHT DOWNTURN – EU FOCUSED

As in preceding months, the downturn in **freight traffic** in October remained focused on **EU airports (-3.4%)**, with **non-EU airports** still making gains **(+1.4%)**.

Out of the top 10 European airports for freight, only 2 saw their traffic increase: Liège (+2.2%) and Luxembourg (+1.9%).

During **October**, 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 **+2.1%**, **+3.2%**, **+1.3%** and **+0.4%**.

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

GROUP 1: Antalya (+14.8%), Vienna (+10.2%), Istanbul SAW (+7.1%), Brussels (+6.4%) and Lisbon (+6.2%).

GROUP 2: Milan MXP (+31.2%), Kyiv KBP (+22.3%), Tel Aviv (+15%), Moscow VKO (+14.2%) and St Petersburg (+10.6%).

GROUP 3: Krakow (+30.4%), Sevilla (+14.8%), Bordeaux (+14.3%), Belgrade (+13.5%) and Riga (+9.3%).

GROUP 4: Bucharest BBU (+913.4%), Ohrid (+191.5%), Mostar (+112.3%), Kharkiv (+69.6%) and Chambéry (+62.5%).

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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.baniac@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.