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# Passenger traffic reaches nearly 95% of pre-pandemic levels in 2023

- **2.3 billion passengers welcomed by Europe's airports in 2023**
- **Passenger traffic surging by +19% over 2022, thus standing just –5.4% below pre-pandemic (2019) volumes**
- **A market characterised by significant performance gaps - while many airports achieved absolute passenger traffic records, a large majority still lagged behind their pre-pandemic volumes.**
- **TOP 5 European airports in 2023:** ***1. London-Heathrow, 2. Istanbul, 3. Paris-CDG, 4. Amsterdam-Schiphol, 5. Madrid***

**Brussels, 1 February 2024 :** The Full Year, Q4 and December 2023 airport traffic report released today by ACI EUROPE reveals a dynamic aviation market reshaped by a mix of structural changes, demand resilience and severe geopolitical tensions.

**Passenger traffic across the European airport network in 2023 surged by +19%** over the preceding year, bringing the total volume to just **-5.4%** below pre-pandemic levels (2019).

The increase was very much driven by **international passenger traffic (+21%),** which grew at almost twice the pace of **domestic passenger traffic (+11.7%),** with airports in the **EU+ market**[1] **(+19%)** overperforming those in **the rest of Europe**[2] **(+16%)**.

**Olivier Jankovec, Director General of ACI EUROPE** said: "*This robust growth resulted in Europe's airports welcoming 2.3 billion passengers through their doors last year – an impressive result considering the prevailing inflationary pressures and higher air fares as well as heightened geopolitical tensions. This is testament to the priority people give to travel over other forms of discretionary spending – and it does speak volumes about the value and importance of air connectivity.*"

MULTI-SPEED RECOVERY AND THE GREAT DIVERGENCE

Beyond these headline results, 2023 was marked by unprecedented variations in traffic performance amongst both national and individual airport markets when compared to pre-pandemic levels (2019):

- Within the **EU+ markets**, airports in Portugal (+12.2%), Greece (+12.1%), Iceland (+6.9%), Malta (+6.7%), and Poland (+4.5%) outperformed – while those in Finland (-29.6%), Slovenia (-26.2%), Germany (-22.4%) and Sweden (-21%) still remained well behind a full recovery.
  Amongst the largest EU+ markets, airports in Spain (+3%) were the only ones having fully recovered, followed by those in Italy (-2%), France (-5.4%), the UK (-6.4%) – and airports in Germany underperforming by a wide margin.

- In the **rest of Europe**, airports in the emerging markets of Uzbekistan (+110%), Armenia (+66%) and Kazakhstan (+51%) saw exponential growth in part due to traffic diversions to/from Russia, along with those in Albania (+117%) and Kosovo (+44%) on the back of Ultra Low-Cost airlines swiftly deploying their capacity. Meanwhile, airports in the major market of Türkiye (+2.5%) just exceeded their pre-pandemic levels.

  At the other end of the spectrum, the passenger traffic recovery of airports in Israel (-12%) was pulled in reverse - with their Q4 passenger traffic (-63%) collapsing, while airports in Ukraine (-100%) remained shuttered due to the ongoing war.

**Jankovec commented**: *"2023 has also been a year of multi-speed recovery and great divergences for Europe's airports in terms of passenger traffic. While many exceeded their previous yearly record in passenger volumes, 57% still remained below their pre-pandemic volumes."*

*"Geopolitical conflicts have been a significant contributor to this multi-speed recovery – predominantly affecting airports in Ukraine, Israel, Finland as well as in other Eastern European countries. But the Covid-19 induced structural changes in the aviation market are also having a major impact. These structural changes include the prominence of leisure, and VFR*[3] *demand as well as the emergence of 'bleisure' demand, along with Ultra Low-Cost Carriers selectively expanding and Full Service Carriers retrenching on their hubs and driving consolidation. While these developments have generally benefitted airports in markets relying on inward tourism, there is no doubt they have also resulted in increased competitive pressures for airports across the board."*

*"Looking ahead at 2024, we are likely to see these performance gaps amongst airports narrowing – but not closing, There is no doubt geopolitical tensions are part of our new reality, and so are structural changes in the aviation market. The big question marks will be about supply pressures and leisure demand resilience – with the latter unlikely to keep defying macroeconomics but becoming increasingly tied to them. We also need to keep a close eye on operational issues, especially border control with the planned start of the Schengen Entry--Exit System next autumn – for which many outstanding issues still need to be resolved."*

*"Accordingly, we are for now keeping our guidance for a +7.2% increase in passenger traffic this year compared to 2023, which should lead us just +1.4% above pre-pandemic volumes."*

SLOWER RECOVERY AT HUBS AND LARGER AIRPORTS

Passenger traffic at the Majors (**top 5 European airports**[4]**)** increased by **+20.8%** in 2023 compared to the previous year – resulting in these airports adding an impressive 58 million passengers.

Despite this significant increase, the Majors still remained **-6.5%** below their pre-pandemic (2019) levels – mainly due to the relative weakness of the Asian market, the slow return of corporate travel and their hub carriers' tight capacity control.

2023 saw changes in the composition and ranking of the top 5 league:

- **London-Heathrow** restored its position as Europe's busiest airport in 2023 – a position held by **Istanbul** the previous year. The British hub **welcomed 79.2 million passengers** – a remarkable increase of +28.5% over 2022, which allowed it to come very close to its pre-pandemic (2019) volumes (-2.1%). Its reliance on transatlantic traffic played a key role in this performance.

- **Istanbul** came second, reaching **76 million passengers** – an increase of +18.3% over 2022. The Turkish hub boasted the best performance amongst the top 5 league when compared to its pre-pandemic (2019) volumes, which it largely exceeded (+11%). Back in 2019, Istanbul was the fifth busiest European airport.

- **Paris-CDG** kept holding the third position with **67.4 million passengers** (+17.3% vs. 2022) and remained -11.5% below its pre-pandemic 2019 (level). The French hub was followed by **Amsterdam-Schiphol** (61.9 million passengers | +17.9% vs. 2022 and -13.7% vs. 2019).

- **Madrid** closed the top 5 league (**60.2 million passengers** | +18.9% vs. 2022), coming very close to its pre-pandemic (2019) level (-2.5%). The Iberian hub's exposure to transatlantic traffic as well as comparatively higher share of leisure traffic allowed it to again surpass Frankfurt in 2023 (59.4 million passengers | +21.3% vs. 2022 and –15.9% vs. 2019).

The 2023 passenger traffic performance of **other large European airports**[5] also reflected structural market changes when compared to pre-pandemic (2019) levels:

- Those traditionally relying on leisure and VFR traffic and with a notable presence of Low-Cost Carriers often surpassed their pre-pandemic (2019) volumes: **Athens** (+10.1%), **Lisbon** (+7.9%), **Palma de Mallorca** (+4.7%), **Istanbul-Sabiha Gökçen** (+4.6%), **Dublin** (+1.8%) and **Paris-Orly** (+1.4%).

- While **Rome-Fiumicino** (-7%) still remained below its pre-pandemic level, the Italian hub saw passenger traffic increasing by +38% year-on-year – the best performance amongst larger European airports.

- **Malaga** with more than 22.3 million passengers (+12.6%) handled more passengers than **Brussels** (-15.8%) and

**Stockholm-Arlanda** (-15%).

SMALLER AND REGIONAL AIRPORTS OUTPERFORMING

Unlike hubs and larger airports, **smaller and regional airports**[6] completed their recovery in 2023 - with their passenger traffic increasing by **+17.6%** compared to the previous year and thus standing at **+3%** above their pre-pandemic (2019) levels.

This performance was largely driven by EU+ airports serving tourist destinations and/or attracting capacity from Ultra Low-Cost Carriers as well as airports in less mature markets in the rest of Europe.

Some of these airports experienced exponential growth well above their pre-pandemic (2019) levels - including: **Trapani** (+223%), **Perugia** (+143%), **Tirana** (+117%), **Samarkand** (+110%), **Lodz** (+97%), **Kutaisi** (+91%), **Zadar** (+88%), **Yerevan** (+66%), **Memmingen** (+64%), **Almaty** (+51%), **Funchal** (+43%), **Zaragoza** (+47%), **Pristina** (+44%) and **Oviedo-Asturias** (+40%).

FREIGHT & AIRCRAFT MOVEMENTS

**Freight traffic** across the European airport network declined by **-2.1%** in 2023 compared to the previous year – a direct result of geopolitical, trade tensions and supply chain disruptions. The decrease was driven by EU+ airports (-2.9%) while airports in the rest of Europe (+3%) saw freight traffic expanding.

The **top 5 European airports for freight traffic** were: **Frankfurt** ( 1,8 million tons | -5% vs 2022), **Istanbul** (1,5 million tons | +6.3%), **London-Heathrow** (1,4 million tons | +6.4%), **Leipzig** (1,4 million tons | -7.7%) and **Amsterdam-Schiphol** (1,4 million tons | -4.2%).

Overall, freight traffic remained **-10%** below pre-pandemic (2019) levels.

**Aircraft movements** in Europe were up by **+11.8%** in 2023 compared to the previous year, but still -**8.1%** below their pre-pandemic (2019) levels.

DATA BY AIRPORT GROUPS

During 2023 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), airports welcoming between 1 million and 5 million passengers per year (Group 4), and airports welcoming between 100 thousand and 1 million passengers (Group 5) reported an average change of -7.6%, -10.2%, +4.3%, +2.0%, -0.8% as compared to pre-pandemic (2019) traffic levels. The airports that reported the best performance in passenger traffic for the Full Year 2023 (when compared to Full Year 2019) are as follows:

GROUP 1: Istanbul **IST** (+11.0%), Athens **ATH** (+10.1%), Lisbon **LIS** (+7.9%), Palma de Mallorca **PMI** (+4.7%), Istanbul **SAW** (+4.6%).

GROUP 2: Porto **OPO** (+16.0%), Naples **NAP** (+14.1%), Málaga **AGP** (+12.6%), Tenerife **TFS** (+10.5%), Marseille **MRS** (+6.4%).

GROUP 3: Sochi **AER** (+105.7%), Almaty **ALA** (+51.2%), Belgrade **BEG** (+29.0%), Valencia **VLC** (+16.6%), Palermo **PMO** (+15.5%).

GROUP 4: Tirana **TIA** (+117.4%), Yerevan **EVN** (+65.6%), Memmingen **FMM** (+64.2%), Pristina **PRN** (+44.3%), Funchal **FNC** (+43.1%).

GROUP 5: Trapani **TPS** (+223.4%), Perugia **PEG** (+142.9%), Samarkand **SKD** (+109.8%), Kutaisi **KUT** (+91.1%), Zadar **ZAD** (+88.3%).

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[1] EU, EEA, Switzerland and the UK.
[2] Albania, Armenia, Belarus, Bosnia & Herzegovina, Georgia, Israel, Kazakhstan, Kosovo, Northern Macedonia, Moldova, Montenegro, Russia, Serbia, Turkey, Ukraine, and Uzbekistan.
[3] Visiting Friends and Relatives
[4] In 2019: London-Heathrow, Paris-CDG, Amsterdam-Schiphol, Frankfurt and Istanbul).
[5] Airports with more than 25 million passengers per annum (2019).
[6] Airports with less than 10 million passengers per annum (2019).

**## ENDS ##**

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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 55 countries. Our members facilitate over 90% of commercial air traffic in Europe. Air transport supports 13.5 million jobs, generating €886 billion in European economic activity (4.4% 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.