

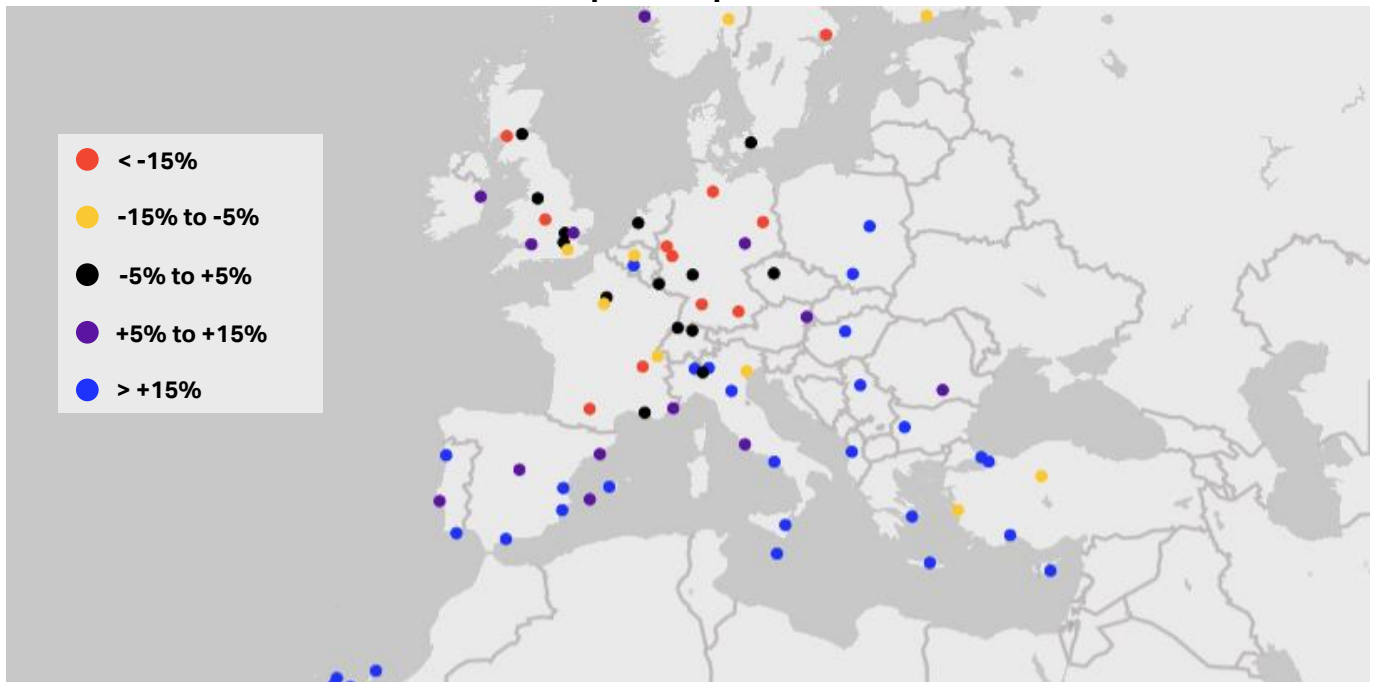


Chart of the Week

30 January 2026

South and East Europe lead growth in European flights

Evolution in aircraft movements at European airports, 2017-2025



Source: Eurocontrol, IATA Sustainability and Economics

Note: Data includes Q1-Q3. Shows airports with more than 50,000 movements in Q1-Q3 2025. BER airport compared with closed SXF & TXL airports.

- Aircraft departures and arrivals (movements) across Europe increased by 8% between 2017 and 2025. However, this overall growth is far from evenly distributed across the continent. Central and northern European markets have generally underperformed compared to their southern and eastern counterparts.
- For example, Swedish airports recorded a substantial 30% decline in the number of movements over the period, and Germany saw a drop of 17%. Presumably alarmed by this, both governments recently acted to eliminate (Sweden) and limit (Germany) the ticket taxes that turned travelers away.
- In stark contrast, a number of the more tourism-driven markets in southern Europe such as Portugal, Türkiye, Spain, and Italy achieved robust growth in movements, with increases ranging from 17% to 22%. In Serbia, Poland, and Hungary movements expanded even more rapidly, up by 34–39% over the period.
- Regional airports typically outpaced the primary hubs' growth in movements. Smaller airports are helped by leisure travel which has expanded more rapidly than business travel, and by tourists increasingly favoring secondary cities as holiday destinations. Low-cost carriers in particular have taken advantage of these trends and increased point-to-point traffic, also benefiting from the frequently lower airport charges imposed by smaller airports. Hubs, on the other hand, have faced capacity constraints in some cases, curtailing growth at such airports.
- Importantly, passenger growth, which expanded by 16% over the period, outstripped the rise in movements. This is possible thanks to increases in both the average aircraft size and the passenger load factor, which reached 84.7% for Europe in 2025, up from 83.8% in 2017.

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