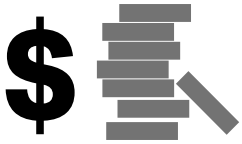
# THE VALUE OF AVIATION BULGARIA

## The economic impact of aviation in Bulgaria

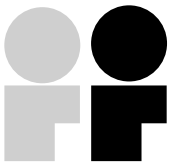
The aviation sector and its quantifiable economic effects made up 2.9% of Bulgaria's GDP and 4.3% of the country's employment in 2025. This covers the sector itself, its supply chain, employee spending, and international air transport-enabled tourism to Bulgaria.

### GDP and employment created by aviation in Bulgaria in 2025



**3.4**
EUR billion

**2.9%**
of GDP



**131.8**
thousand jobs

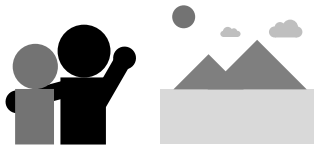
**4.3%**
of employment

*Included economic impacts:*
***Direct** – within aviation sector, **Indirect** – aviation supply chain,*
***Induced** – employee spending, **International tourists arriving by air***

### Breakdown of GDP and employment created







| Airlines | Airports, ANSPs, civil manufacturing | International tourists arriving by air |
|---|---|---|
| EUR 767.9 million | EUR 1.3 billion | EUR 1.3 billion |
| 25.9 thousand jobs | 49.9 thousand jobs | 55.9 thousand jobs |

Source: Air Transport Action Group, 2026. Aviation Benefits Beyond Borders report based on data from Oxford Economics.
Note: Economic impacts are calculated using Oxford Economics' Aviation: Benefits Beyond Borders methodology with inputs sourced from publicly available statistics and recognized industry datasets wherever possible, with modelling-based estimates applied where direct data are not available. Estimates do not include domestic tourism spending, nor the wider catalytic benefits of aviation on trade, investment, productivity gains, and enhanced connectivity, among others.
Note: Converted to local currency using average 2025 exchange rate: USD 1 = EUR 0.88

# Air transport brings millions of people safely to global destinations

Around 5.9 million air passengers departed from Bulgaria in 2025, based on Origin-Destination(O-D) traffic, making Bulgaria the 68th largest air passenger market globally.

## Air travel from Bulgaria in 2025, Origin-Destination (O-D)

**5.9**
million
passenger departures

**GROWTH**

**103.5%**
10-year growth

**9.7%**
year-on-year growth

**RANK**

**68th**
Global
No change since 2015

**26th**
in Europe
No change since 2015

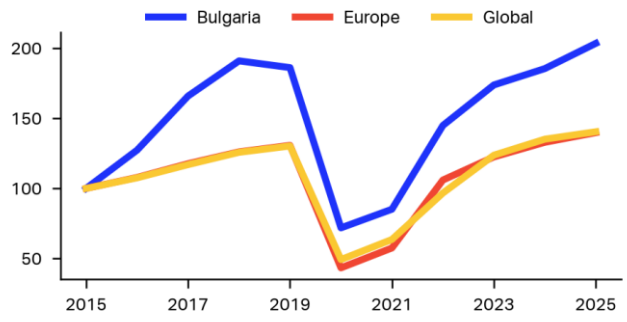
**SHARE**

**0.1%**
of global departures

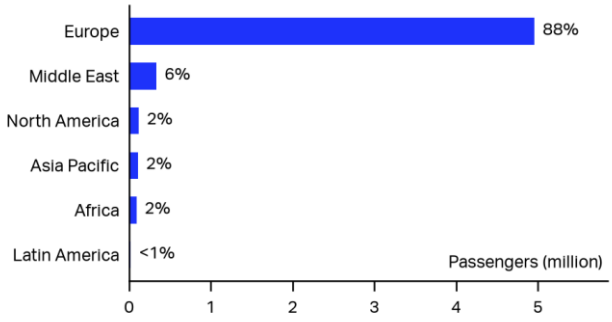
**0.5%**
of European departures

International: 5.6 million passenger departures, 103.9% 10Y growth, 9.7% YoY growth

### Total passenger departures, O-D, 2015-2025, index 2015=100




### International passenger departures by destination region, O-D, 2025




**Top air travel markets**
Inbound & outbound

1. Germany
2. United Kingdom
3. Italy
4. Spain
5. Israel

**Top origin cities**
Inbound

1. London
2. Tel Aviv-Yafo
3. Vienna
4. Frankfurt
5. Berlin

**Top destination cities**
Outbound

1. Vienna
2. London
3. Milan
4. Rome
5. Frankfurt

Source: IATA Sustainability & Economics using IATA DDS data.
Note: O-D (origin-destination) departures measures passengers beginning their journey in Bulgaria, to their final destination, excluding transfer and transit passengers.
Top air travel markets based on total O-D passenger traffic between Bulgaria and other markets in 2025. Top outbound and inbound cities are based on round-trip passenger journeys.
IATA DDS data are derived from ticketing and sales transactions using IATA methodologies and estimates; therefore, results may not exactly match officially reported traffic statistics.

## Air transport directly connects Bulgaria to 39 different countries

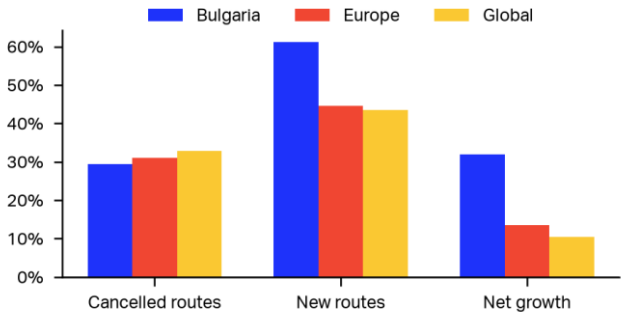
In 2025, there were 4 airports and 61 operating airlines in Bulgaria, providing a total of 211 regularly scheduled commercial passenger routes for Bulgaria, connecting to 39 countries with about 93 daily international departures.

### Air Connectivity in Bulgaria

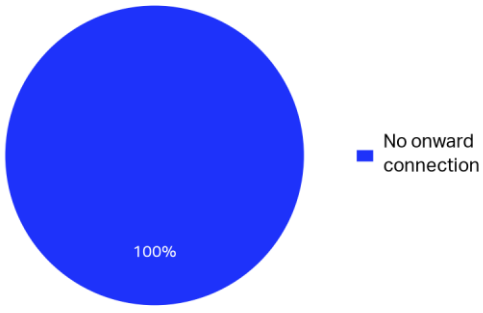



| | | Total | | |
|---|---|---|---|---|
| | | Available routes | Connected countries | Daily int. departures |
| 2025 | Total | 211 | 39 | 93 |
| | Global rank | 47th | 51st | 66th |
| | Europe rank | 23rd | 25th | 26th |
| 2015 | Total | 160 | 39 | 65 |
| | Global rank | 58th | 41st | 75th |
| | Europe rank | 25th | 21st | 28th |

**Route network change, 2015 to 2025, % of 2015**




**Onward connections of international arrivals, 2025**

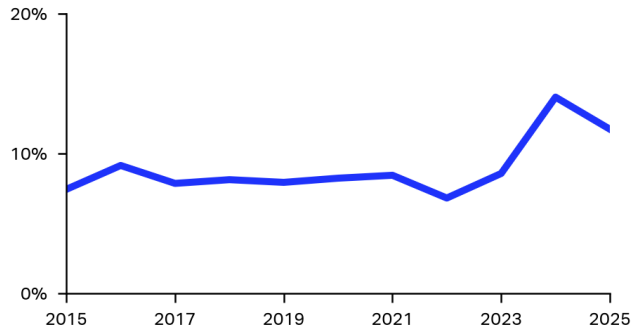



Source: IATA Sustainability & Economics using OAG & IATA DDS data.
Note: Airport, airline, and route counts include only those with regularly scheduled passenger services from Bulgaria. Airports with fewer than 1,000 regularly scheduled seats in 2025 are excluded.

## Air Cargo provides Bulgaria timely and safe access to global markets

Although air transport accounted for an estimated 1.8% of Bulgaria's traded goods by weight, it carried 12.6% of their total value.
Bulgaria's airports handled around 22.9 thousand tonnes of air cargo in 2025, ranking Bulgaria as the world's 106th largest air cargo handler market and the 30th largest in Europe.

**Bulgarian air cargo, value, % of total, 2015-2025**




**Bulgarian air cargo, share of trade, 2025**

**1.8%**
of trade by weight

**12.6%**
of trade by value

**Air cargo handled in Bulgaria, 2025**

**22.9**
thousand tonnes
air cargo handled

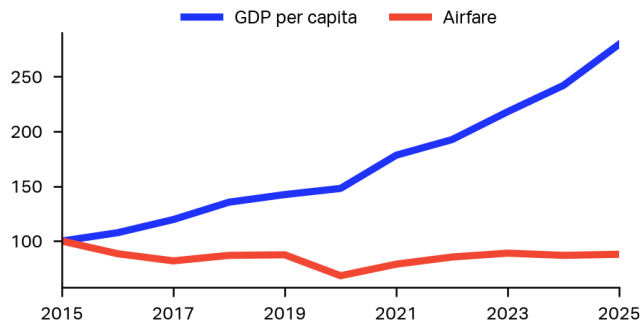
**106th**
Globally
30th in Europe

Source: Airports Council International (ACI) for air cargo handled, Global Trade Tracker (GTT) for imports and exports by air.
Note: Bulgaria's trade by air includes imports and exportswith non-EU countries. It is based on the country's self reported customs data.

## International air travel from Bulgaria has become more affordable over the past decade

Bulgaria's nominal GDP per capita increased by 179.7%, while the average nominal airfare for an international ticket from Bulgaria decreased by 12.1%, over the past decade. Therefore, international air travel has become more affordable for local residents over this time period.

**Nominal GDP per capita & average international fare, Bulgaria, 2015-2025, index 2015=100**




Source: IATA DDS, World Bank. Nominal GDP per capita and fare developments measured in USD terms.