



AIRPORTS COUNCIL
INTERNATIONAL

Connecting the Dots: *Benefits of Airports & Air Connectivity*

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European Airports & Air Connectivity Generate

€851 BILLION
IN GDP

5%
OF EUROPEAN GDP

14 MILLION
JOBS

6%
OF TOTAL EUROPEAN JOBS

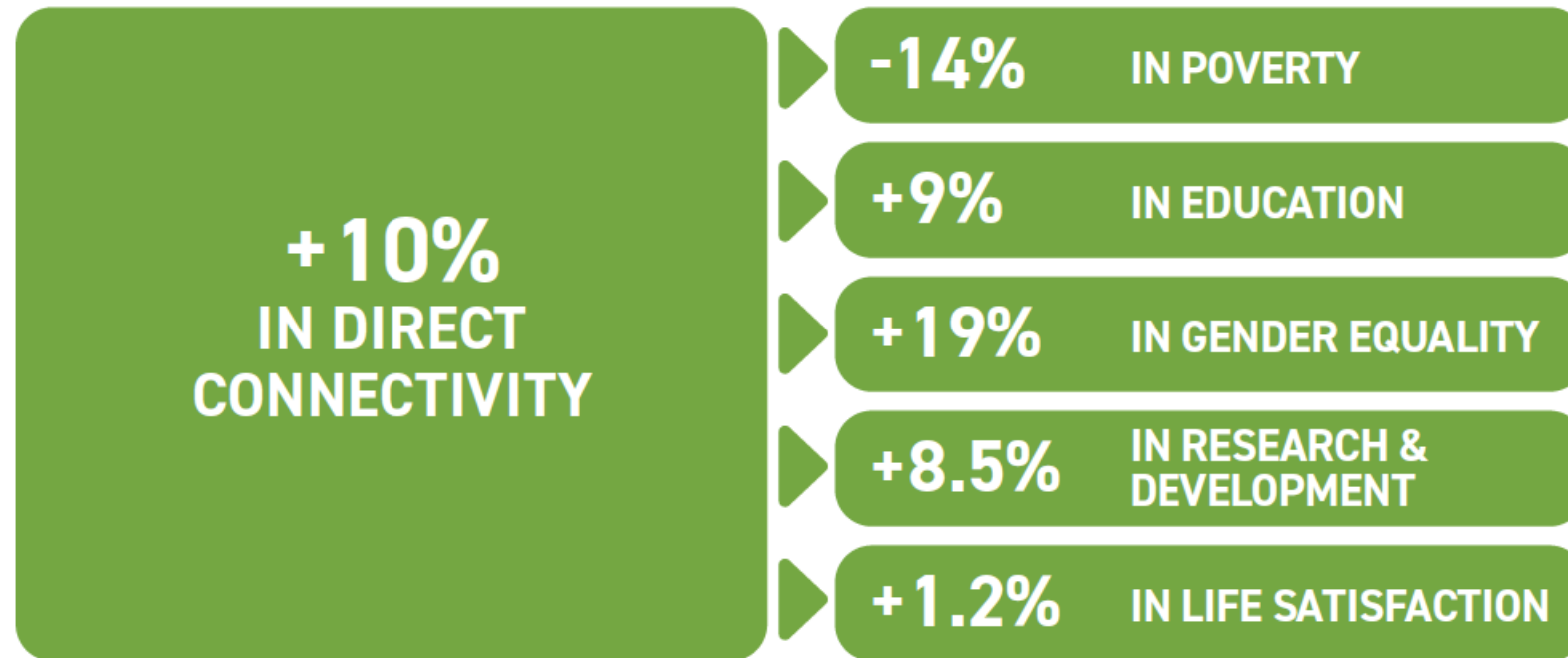
+10%
IN DIRECT CONNECTIVITY

+0.5% OF EUROPEAN GDP
PER CAPITA

+1.6% JOBS

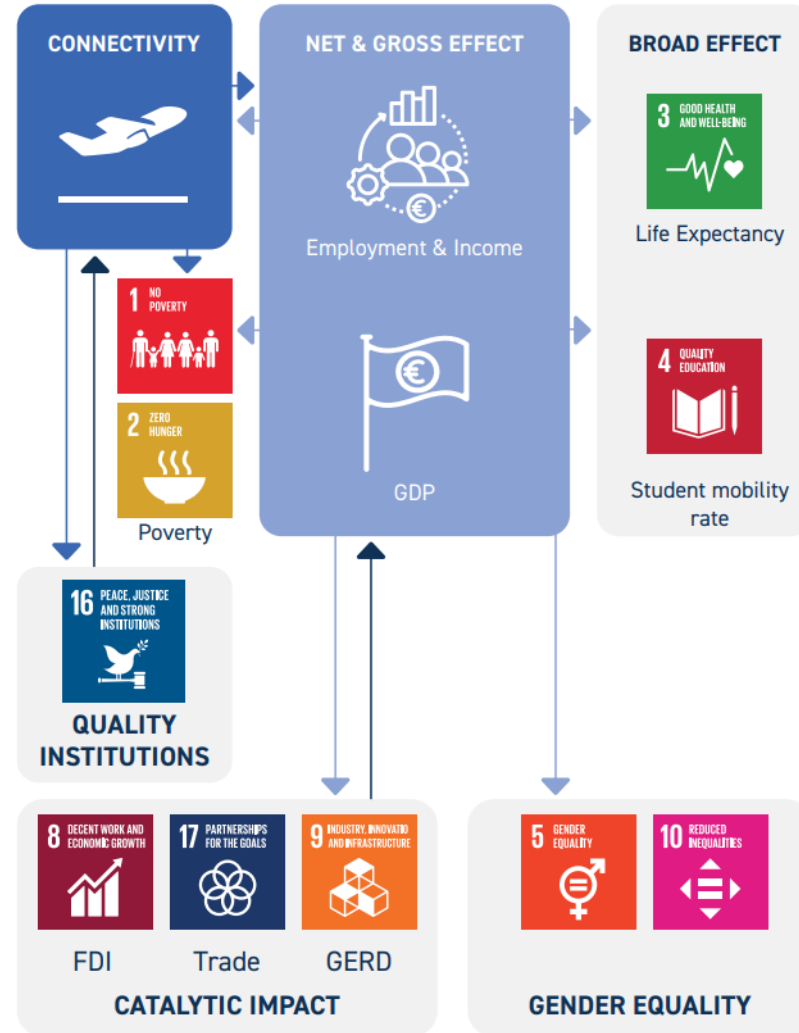
European Airports & Air Connectivity Generate

SUSTAINABLE DEVELOPMENT GOALS



Source: SEO Amsterdam Economics Study – The Economic and Social Impact of European Airports and Air Connectivity, 2024

European Airports & Air Connectivity Generate



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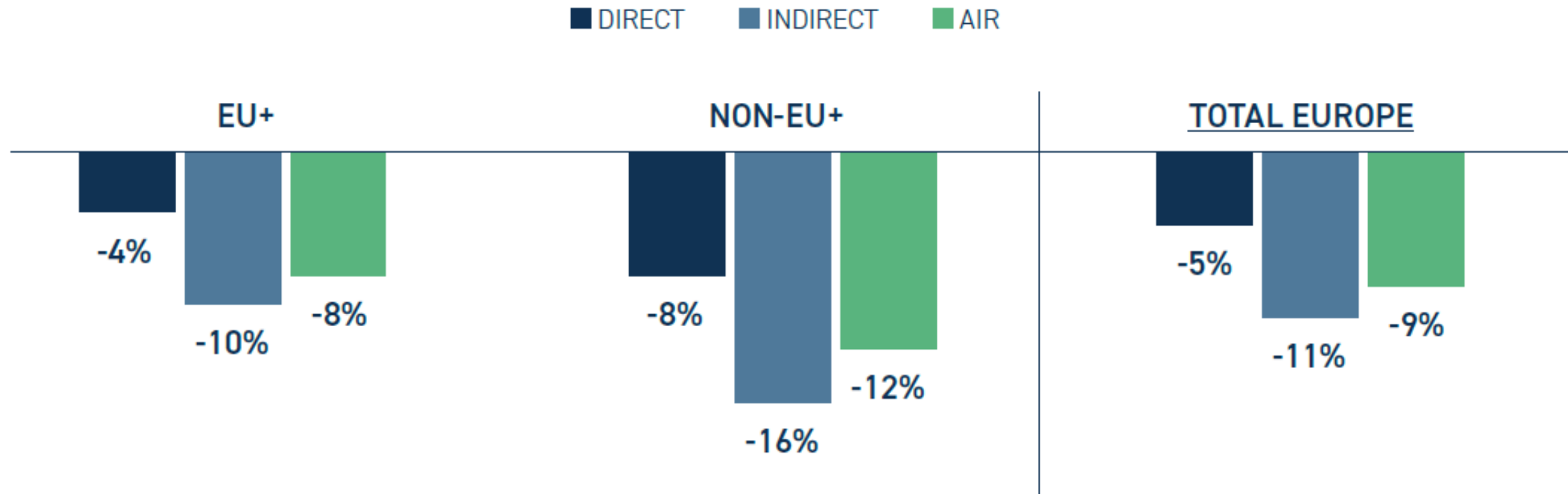


European Air Connectivity - Overview

- **Air connectivity recovery remains behind passenger traffic levels**
- **Only half of European countries exceeded their 2019 air connectivity levels**
- **Best performing countries vs. 2019 in EU+ market:**
1. GREECE 2. PORTUGAL 3. CYPRUS
- **Significant gaps between direct and indirect connectivity** = changed European aviation market structure - expansion of Ultra-Low-Cost Carriers and relative retrenchment of Full-Service Carriers.

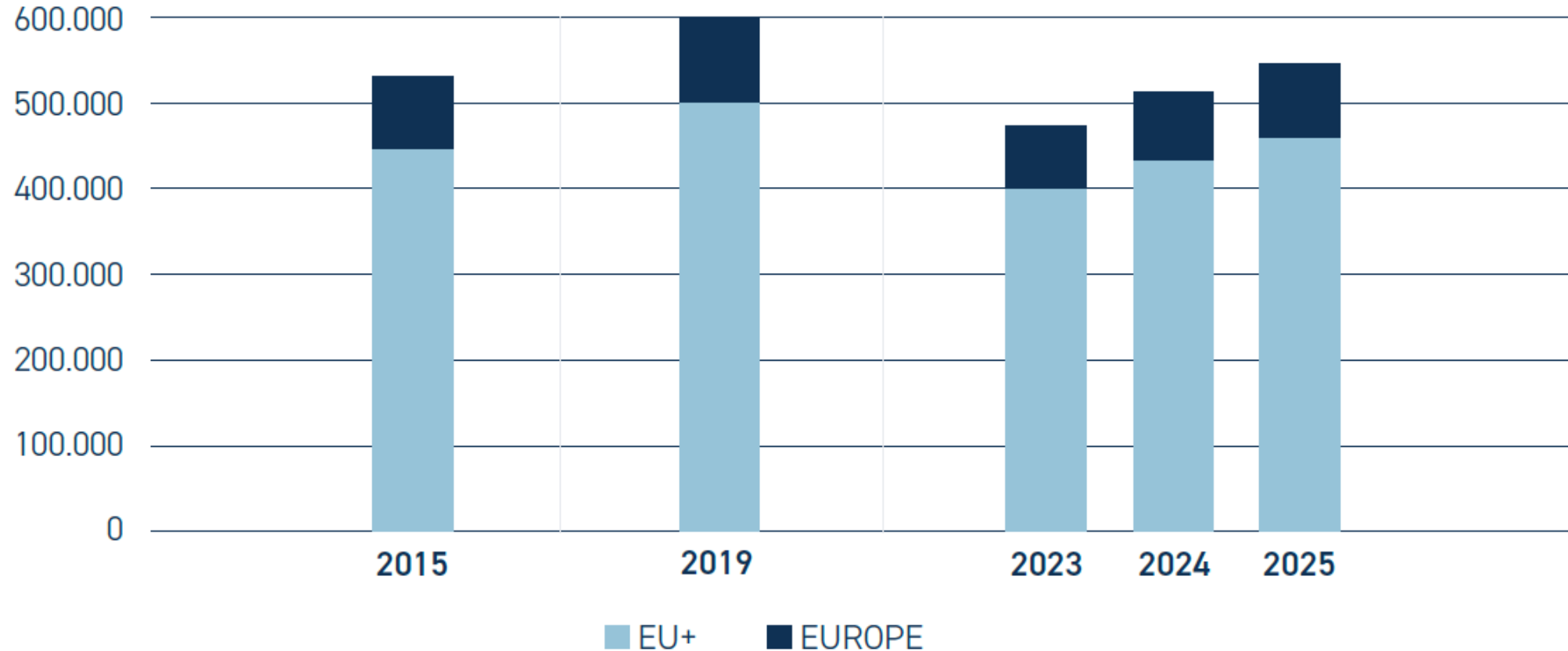
European Air Connectivity - Overview

DIRECT, INDIRECT & AIR CONNECTIVITY (EU+, NON-EU+ AND ALL EUROPEAN AIRPORTS – 2025 VS. 2019)



European Air Connectivity - Overview

ANNUAL AIR CONNECTIVITY (EU+ AND ALL EUROPEAN AIRPORTS)



Greece Air Connectivity - Overview

% CHANGE IN AIR CONNECTIVITY – RANKED BY % CHANGE VS. 2019

EU+		2025 VS. 2019	2025 VS. 2024
Country			
1	Greece	+35%	+10%
2	Portugal	+10%	+6%
3	Cyprus	+8%	+13%
4	Spain	+3%	+5%
5	Ireland	+3%	+8%
6	Croatia	+3%	+10%
7	Iceland	+2%	-5%
8	Lithuania	+2%	+15%
9	Poland	+1%	+10%
10	Italy	+1%	+9%
11	Estonia	-1%	+1%
12	Romania	-1%	+11%
13	United Kingdom	-7%	+6%
14	Slovakia	-9%	+18%
15	Netherlands	-9%	+10%
16	Belgium	-11%	+9%
17	Bulgaria	-12%	+15%
18	Switzerland	-12%	+5%
19	Denmark	-12%	+1%
20	Slovenia	-12%	+23%
21	Norway	-13%	+0%
22	Luxembourg	-13%	+4%
23	France	-14%	+1%
24	Hungary	-14%	+11%
25	Malta	-15%	+11%
26	Latvia	-18%	+8%
27	Germany	-21%	+5%
28	Austria	-21%	+10%
29	Czechia	-22%	+8%
30	Finland	-30%	+11%
31	Sweden	-33%	-4%

NON-EU+		2025 VS. 2019	2025 VS. 2024
Country			
1	Uzbekistan	+73%	+34%
2	Albania	+56%	+1%
3	Bosnia and Herzegovina	+40%	+19%
4	Türkiye	+36%	+10%
5	Armenia	+36%	+21%
6	Tajikistan	+28%	-8%
7	Turkmenistan	+21%	+31%
8	North Macedonia	+17%	+16%
9	Georgia	+15%	+15%
10	Serbia	+8%	+10%
11	Azerbaijan	+7%	-9%
12	Moldova	+4%	+32%
13	Kyrgyzstan	+4%	+5%
14	Kosovo	+1%	+22%
15	Kazakhstan	-3%	+22%
16	Montenegro	-6%	+9%
17	Israel	-21%	+36%
18	Russia	-43%	+0%
19	Belarus	-70%	+142%
20	Ukraine	NA	0%

GREECE tops the EU+ market ranking in terms of air connectivity increases vs. 2019.



+35% vs. 2019

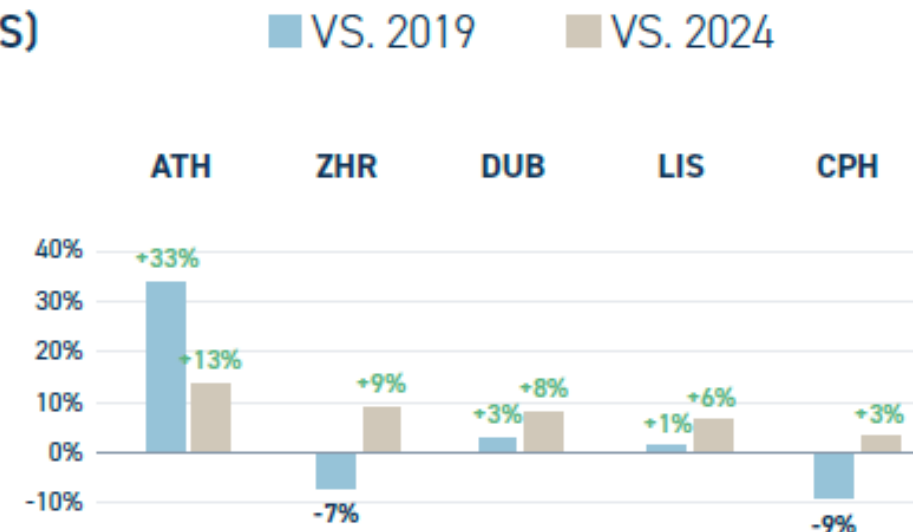
+10% vs. 2024

Athens International Airport Air Connectivity - Overview



MEGA AIRPORTS (25 TO 40 MILLION PASSENGERS)

RANK 2025	CODE	CITY	RANK 2019	VS. 2019	VS. 2024
1	ZRH	Zurich	9	-7%	+9%
2	ATH	Athens	21	+33%	+13%
3	DUB	Dublin	14	+3%	+8%
4	LIS	Lisbon	15	+1%	+6%
5	CPH	Copenhagen	13	-9%	+3%



Athens Airport is expanding its air connectivity the fastest in its size category (25-40 mppa) vs. 2019 & vs. 2024.

+33% vs. 2019

+13% vs. 2024

Athens International Airport Direct Connectivity - Overview



DIRECT CONNECTIVITY — TOP 20 AIRPORTS IN EUROPE IN 2025
(2025 VS. 2019 | RANKINGS 2025 & 2019)



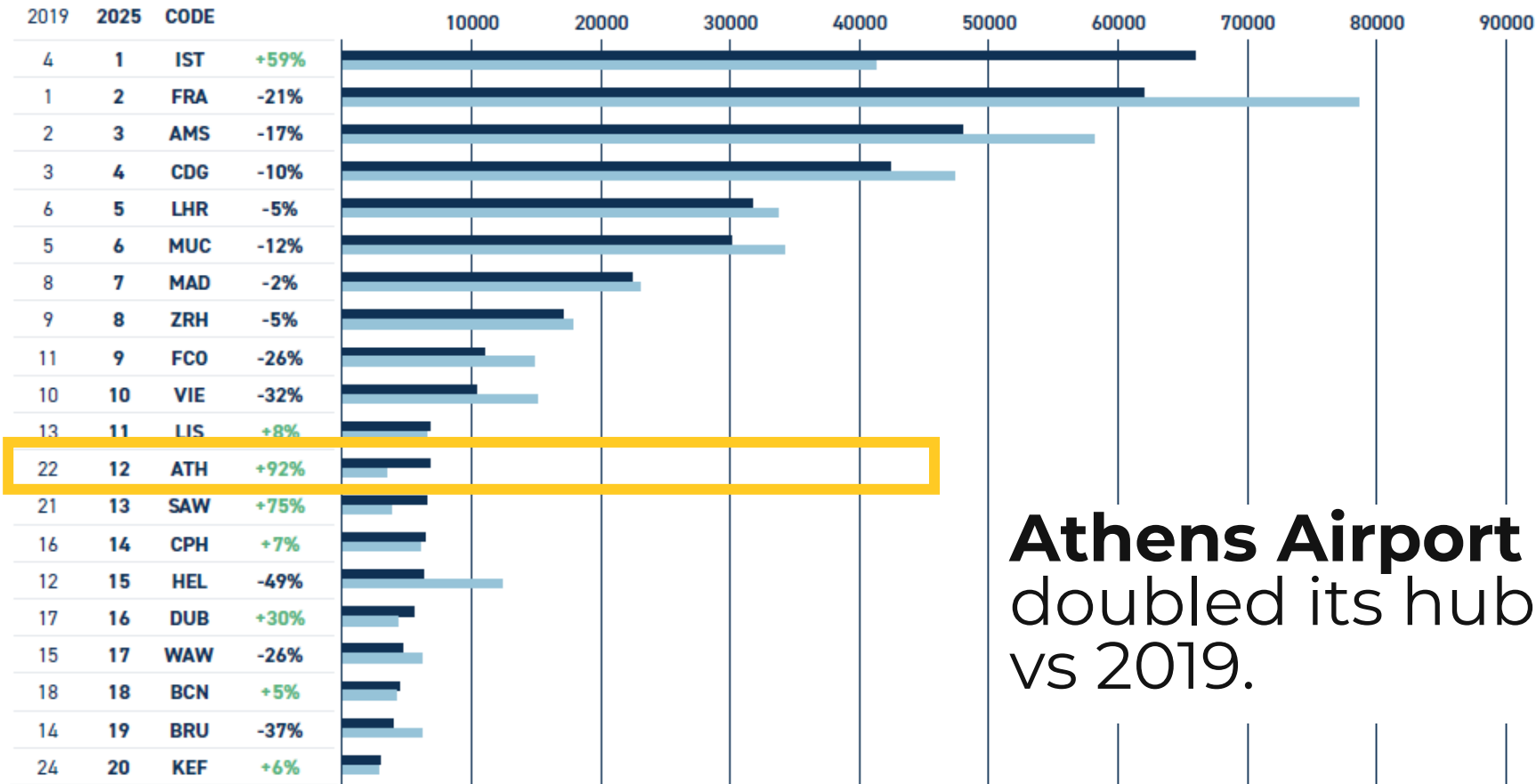
AIA gained ten positions in direct connectivity ranking vs 2019.

Athens International Airport Hub Connectivity - Overview



HUB CONNECTIVITY - TOP 20 AIRPORTS EUROPE IN 2025
(2025 VS. 2019 | RANKINGS 2025 & 2019)

■ 2025 ■ 2019



Athens Airport almost doubled its hub connectivity vs 2019.



**Greece Uniquely Positioned For Socio-Economic
Success Underpinned By Air Connectivity**

Downloads



**2025 Airport Industry
Connectivity Report**



**Synopsis: Benefits of Airports
& Air Connectivity**

Thank you

www.aci-europe.org

www.airportcarbonaccreditation.org

