

QUARTERLY REPORT

TRAFFIC DATA

I Quarter 2025

**Edited by the Fare Supervision and Air Transport Statistics
Departement**



Summary

Quarterly Data

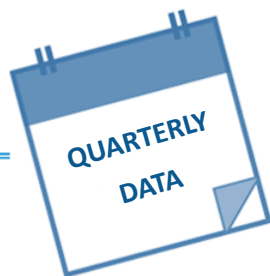
- Key Data 3 - 7
- Passengers 8 - 12
- Cargo 13 - 15

Other Information 16 - 17



Traffic Data Report

Quarterly Flows



I Quarter 2025



Key data – I Quarter 2025

Passengers, cargo and flights

PASSENGERS



43.213.360

▲ 8%
vs 2024

▲ 15%
vs 2019

CARGO



280.121

≈ -1%
vs 2024

▲ 14%
vs 2019

FLIGHTS



346.793

▲ 5%
vs 2024

▲ 3%
vs 2019

Key data – I Quarter 2025

Passenger traffic by geographic scope and carrier type. Rank top-3 apt.

GEOGRAPHICAL SCOPE



NATIONAL
14.524.595

▲ 6% vs 2024

INT. UE
17.902.446

▲ 9% vs 2024

INT. EXTRA-UE
10.786.319

▲ 8% vs 2024

CARRIER TYPE



LEGACY
16.377.613

▲ 6% vs 2024

LOW-COST
26.835.747

▲ 9% vs 2024

TOP 3 AIRPORTS



PASSENGERS

Roma Fiumicino
10.244.785

Milano Malpensa
6.416.486

Bergamo Orio al Serio
3.507.908

CARGO

Milano Malpensa
179.423

Roma Fiumicino
54.000

Venezia Tessera
10.989

FLIGHTS

Roma Fiumicino
69.220

Milano Malpensa
48.679

Milano Linate
27.405

Key data – I Quarter 2025

Passenger share by geographic scope and carrier type. Rank top-3 apt.

GEOGRAPHICAL SCOPE



NATIONAL

34%

≈ 0 pt. perc.
vs 2024

INT. UE

41%

≈ 0 pt. perc.
vs 2024

INT. EXTRA-UE

25%

≈ 0 pt. perc.
vs 2024

CARRIER TYPE



LEGACY

38%

≈ -1 pt. perc.
vs 2024

LOW-COST

62%

≈ 1 pt. perc.
vs 2024

TOP 3 AIRPORTS



PASSENGERS

Roma Fiumicino

24% ≈ 0 pt. perc.

Milano Malpensa

15% ≈ 1 pt. perc.

Bergamo Orio al Serio

8% ▼ -1 pt. perc.

CARGO

Milano Malpensa

64% ≈ 1 pt. perc.

Roma Fiumicino

19% ≈ 0 pt. perc.

Venezia Tessera

4% ≈ 0 pt. perc.

FLIGHTS

Roma Fiumicino

20% ≈ 1 pt. perc.

Milano Malpensa

14% ≈ 0 pt. perc.




Milano Linate

8% ≈ 0 pt. perc.

Key data – I Quarter 2025

Comparison to same period 2024 and 2019

The nationwide air traffic data related to I Quarter 2025 have been compared to the same period of the previous year (2024) and to 2019, as pre-Pandemic benchmark. Here following the **scheduled** and **charter** traffic data related to passengers, cargo and flights.

Traffic category	2019	2024	2025	Δ% 2024	Δ% 2019	
Passengers (units)	37.452.872	40.162.181	43.213.360	▲ 8%	▲ 15%	
Cargo (tons)	245.115	282.035	280.121	≈ -1%	▲ 14%	
Flights (units)	337.758	331.653	346.793	▲ 5%	▲ 3%	

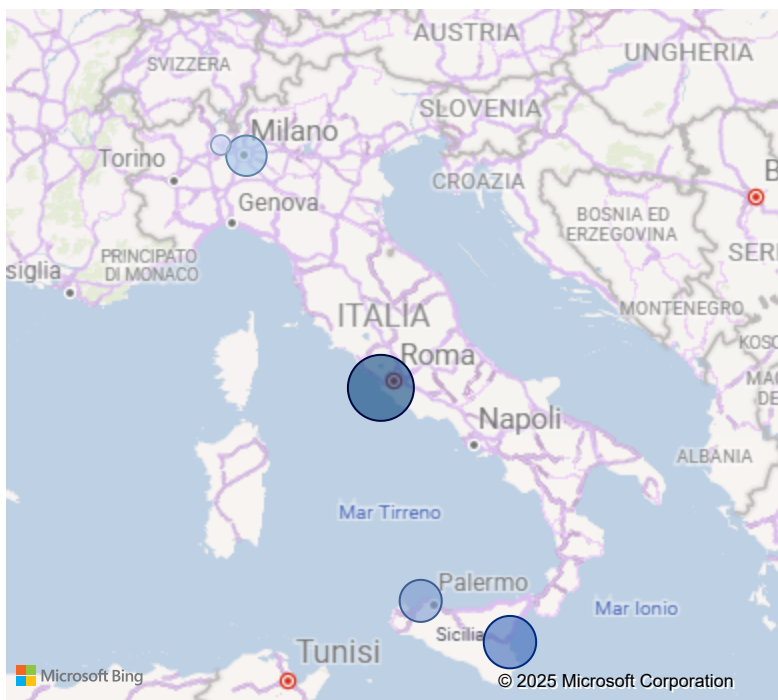
Traffic data related to **passengers** show as during **I Quarter 2025** about **43,2 M** of persons have been moved, recording an **increase** of **+7,6%** compared to the same period of last year. Assuming 2019 as benchmark, it results that the passengers sector **has recovered pre-Pandemic values**, with a positive trend of **+15,4%** compared to I Quarter 2019.

As far as **cargo** sector concerns, during **I Quarter 2025** air traffic reached about **280,1 K tons** , recording **steady values** , with a variation of **-0,7%** compared to the same period of the previous year. Assuming as benchmark 2019, cargo sector **has recovered pre-Pandemic values** , with a positive trend of **+14,3%** compared to I Quarter 2019.

Passengers – I Quarter 2025

National Scope - Top-5 Airports

During the I Quarter the **national passengers** air traffic recorded 14.524.595 units, corresponding to **34%** out of the total and an increase of +5,7% compared to the same period of the previous year. **Top five airports** reached a traffic of **7.120.565 units**, accounting for the **49%** out of total domestic passengers traffic, with an increase of **+2,8%** compared to I Quarter 2024. **Roma Fiumicino** is the first airport in terms of national air traffic, with a market share of 15%, which matches to 2.227.161 passengers. Connections Catania Fontanarossa - Roma Fiumicino represent the main route.

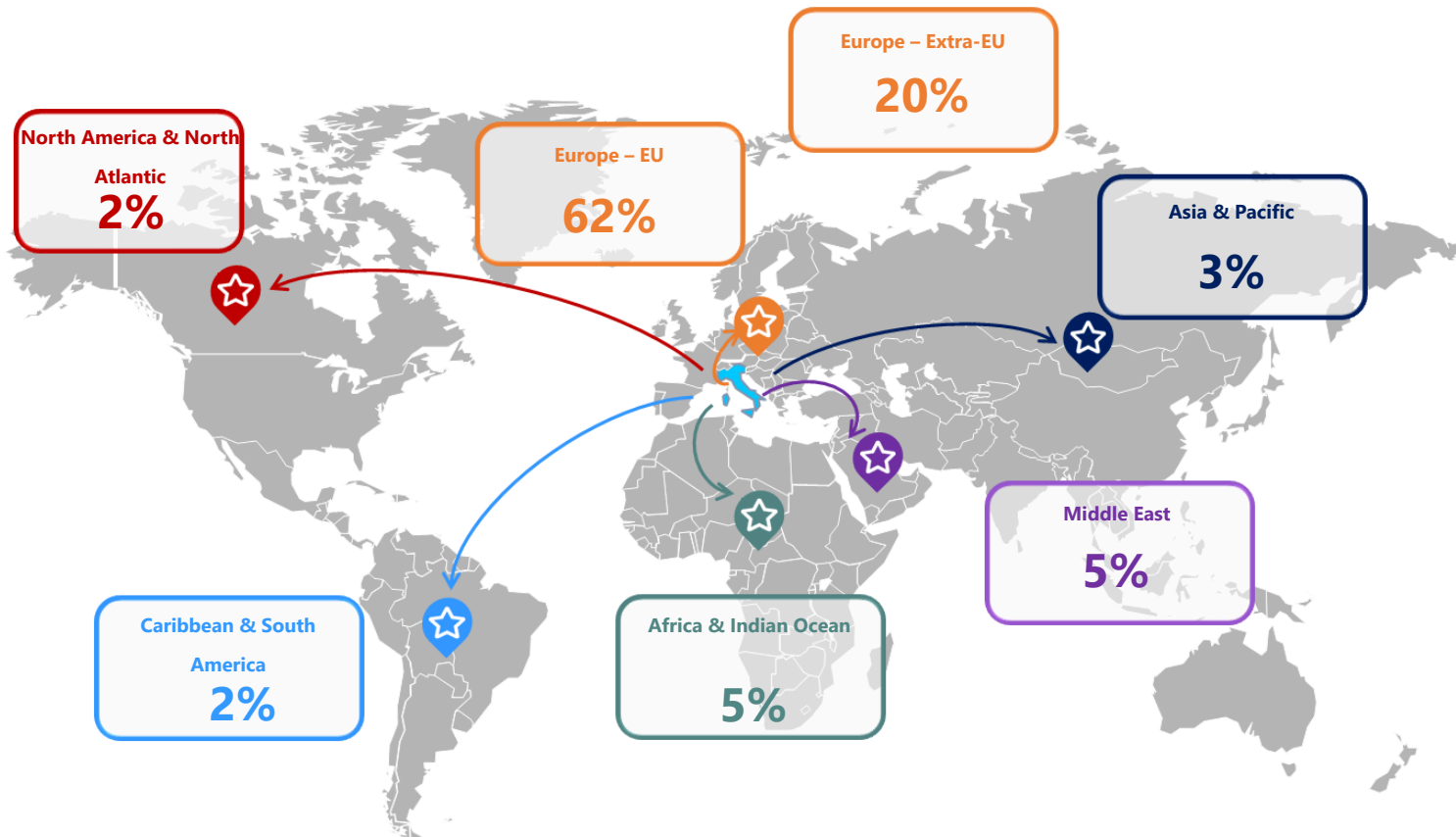


Airport	Share	Pax	Δ% vs 24
● Roma Fiumicino	15,3%	2.227.161	▲ 4%
● Catania Fontanarossa	10,8%	1.571.436	▲ 3%
● Palermo Punta Raisi	8,4%	1.223.094	▲ 5%
● Milano Linate	8,1%	1.180.140	▼ -3%
● Milano Malpensa	6,3%	918.734	▲ 6%

Passengers – I Quarter 2025

International Scope - Share by geographical area

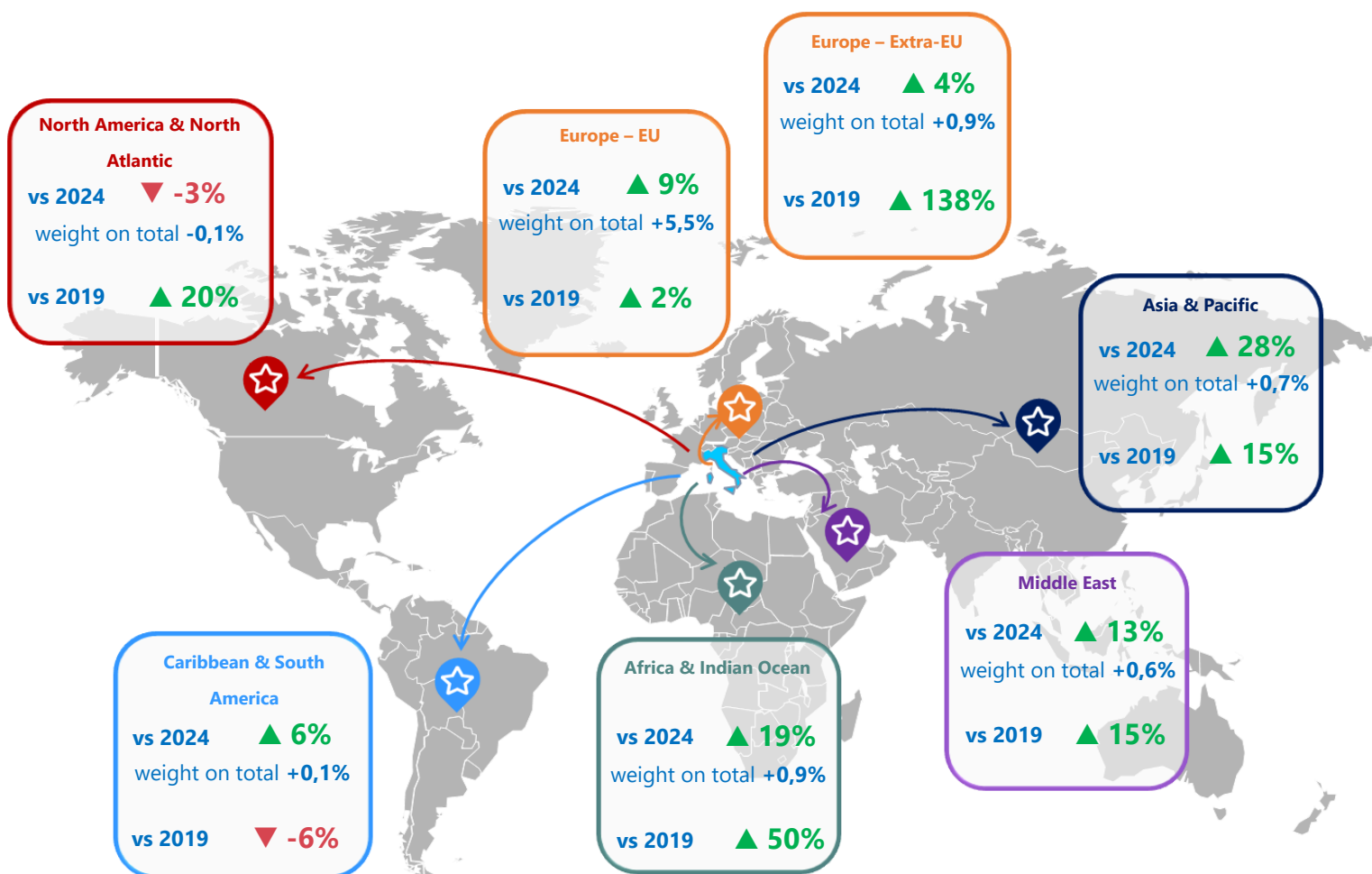
During the I Quarter the **international passengers** traffic recorded **28.688.765 units**, corresponding to **66%** out of total. As compared to the same period of the previous year, there is an **increase** of **+8,6%**. Data have been processed excluding national traffic, therefore the traffic share with European Union does not include domestic one (14.524.595 passengers). The **Europe - EU**, is the geographical area to which the most traffic is observed with **Spain** being the first country and **Roma Fiumicino - Madrid Barajas** the main route.



Passengers – I Quarter 2025

International Scope - Change in traffic by geographical area

Data elaborated by geographical area show how, in **absolute** terms, the highest growth rate has been recorded in **Asia & Pacific** area: **+27,8%**, corresponding to an increase of total international traffic by +0,7%, meaning **+196.647** passengers. In **relative** terms, instead, the **Europe - EU** has been the geographic area that had the greatest impact on total traffic: **+5,5%**, meaning **+1.452.310** passengers.

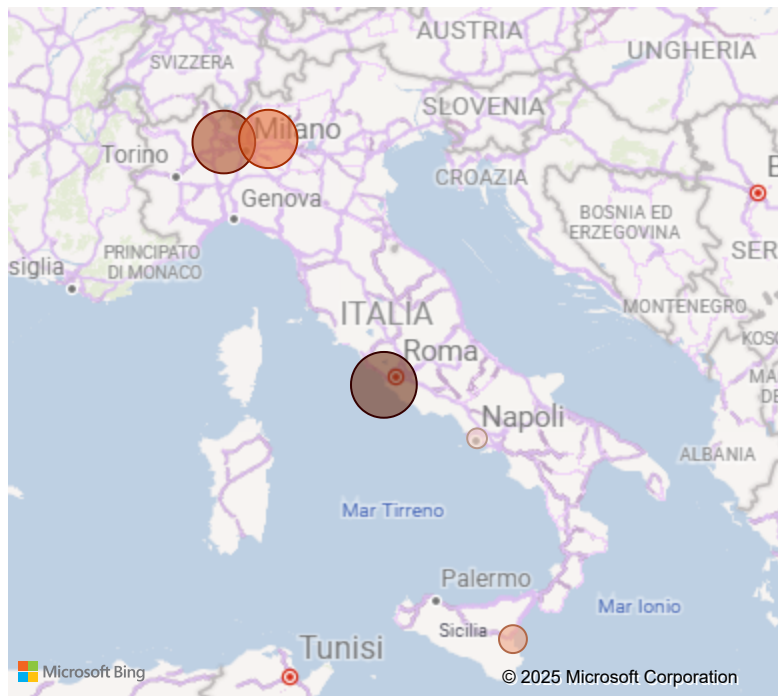


Passengers – I Quarter 2025

Low-cost Carriers



During the I Quarter the **low-cost** passengers air traffic recorded 26.835.747 units, corresponding to **62%** out of the total and an increase of **+8,7%** compared to the same period of the previous year. Furthermore, the comparison between low-cost and legacy segments shows that the **share** of low-cost has remained essentially unchanged . **Top five airports** reached a traffic of **14.868.040 units**, accounting for the **55%** out of total low-cost passengers traffic, with an increase of +6,5% compared to I Quarter 2024. **Roma Fiumicino** is the first airport in terms of low-cost air traffic, with a market share of 15%, which matches to 4.140.090 passengers. Connections Roma Fiumicino - Barcelona El Prat represent the main route.



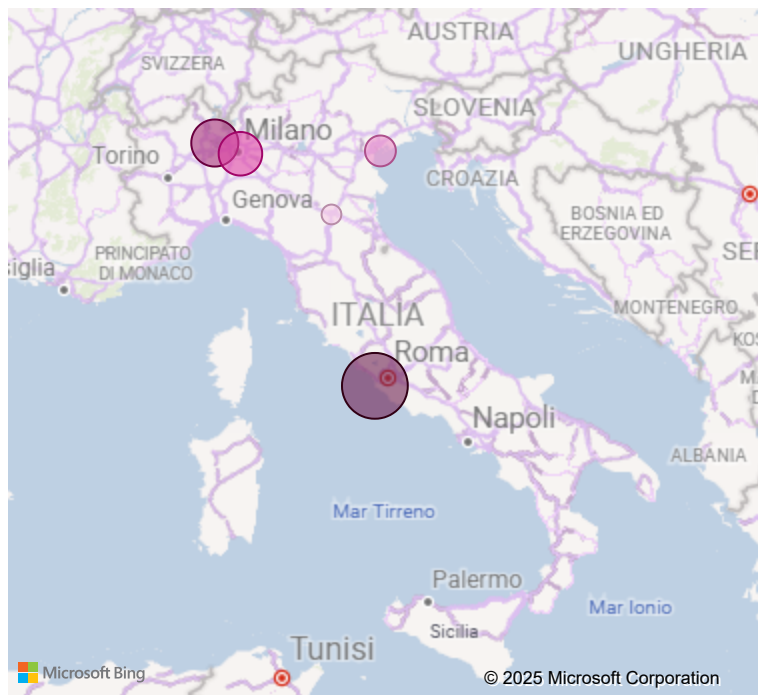
Airport	Share	Pax	Δ% vs 24
● Roma Fiumicino	15,4%	4.140.090	▲ 16%
● Milano Malpensa	14,2%	3.824.017	▲ 17%
● Bergamo Orio al Serio	12,7%	3.411.258	▼ -7%
● Catania Fontanarossa	6,6%	1.784.113	≈ 1%
● Napoli Capodichino	6,4%	1.708.562	≈ 1%

Passengers – I Quarter 2025

Legacy Carriers



During I Quarter the **legacy** passengers air traffic recorded 16.377.613 units, corresponding to **38%** out of the total and an increase of **+5,8%** compared to the same period of the previous year. Furthermore, the comparison between legacy and low-cost segments shows that the share of legacy has remained essentially unchanged . **Top five airports** reached a traffic of **12.509.040 units**, accounting for the **76%** out of total legacy passengers traffic, with an increase of +6,0% compared to I Quarter 2024. **Roma Fiumicino** is the first airport in terms of legacy air traffic, with a market share of 37%, which matches to 6.104.695 passengers. Connections Roma Fiumicino - Madrid Barajas represent the main route.



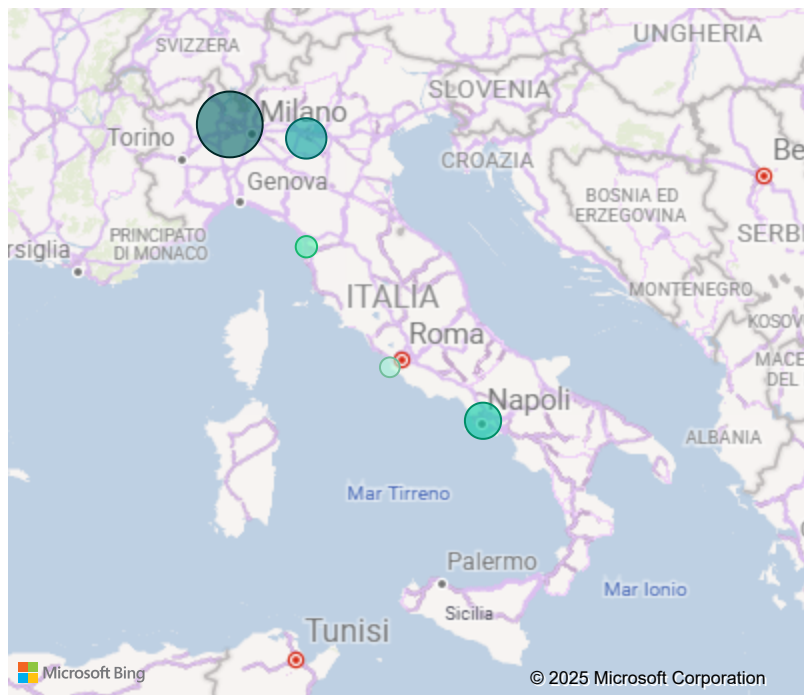
Airport	Share	Pax	Δ% vs 24
Roma Fiumicino	37,3%	6.104.695	▲ 6%
Milano Malpensa	15,8%	2.592.469	▲ 6%
Milano Linate	13,0%	2.131.689	▲ 2%
Venezia Tesser	6,1%	997.690	▲ 17%
Bologna Borgo Panigale	4,2%	682.497	▲ 6%

Cargo – I Quarter 2025

National Scope - Top-5 Airports



During I Quarter the **national cargo** air traffic recorded 17.884 tons, corresponding to **6%** out of total and a decrease of -4,8% compared to the same month of the previous year. **Top five airports** reached a traffic of **12.171 tons**, accounting for the **68%** out of total domestic cargo traffic, with a decrease of **-2,2%** compared to I Quarter 2024. **Milano Malpensa** is the first airport in terms of national cargo air traffic, with a market share of 31%, which matches to 5.504 tons. Connections Milano Malpensa - Napoli Capodichino represent the main route.

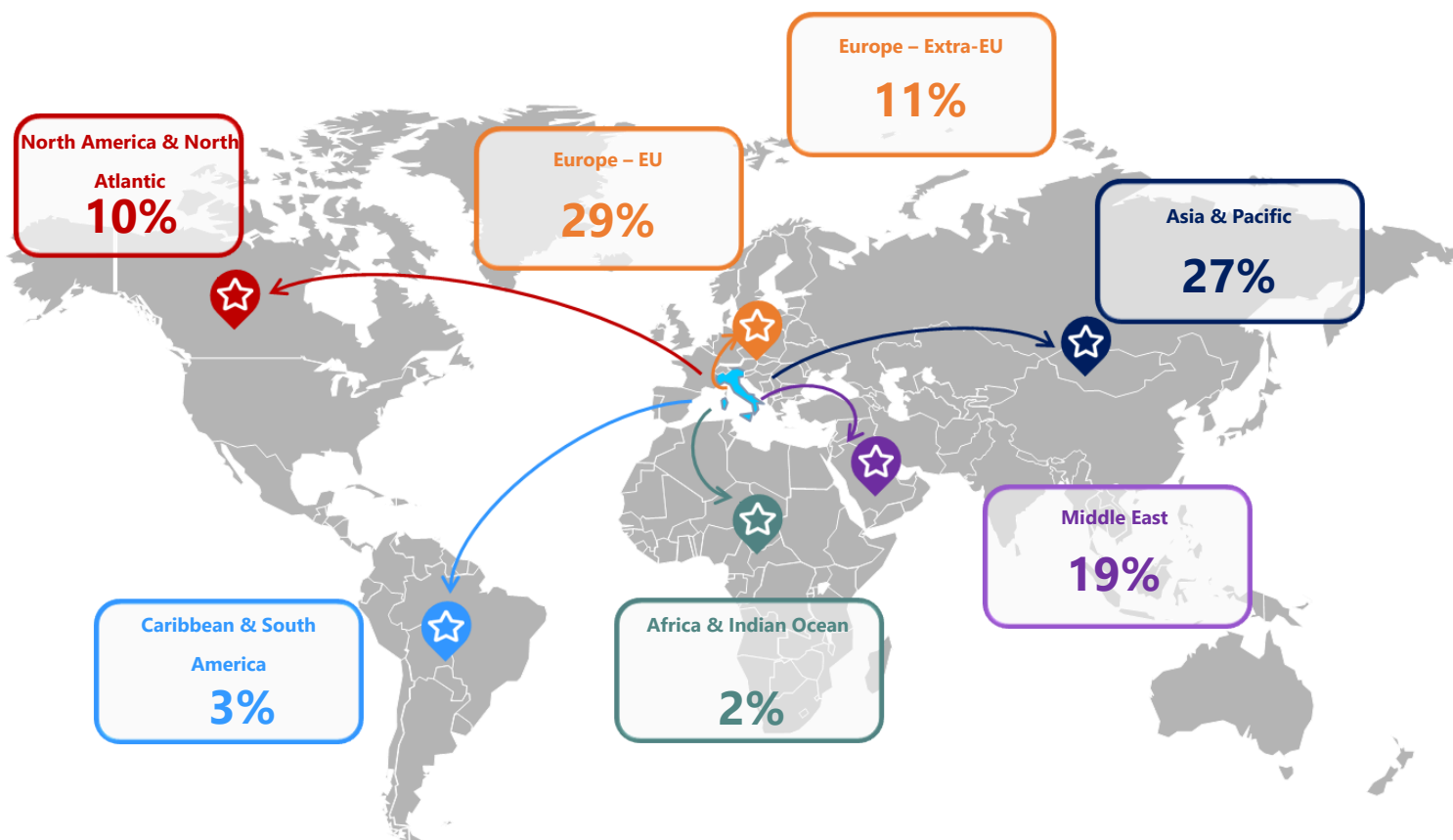


Airport	Share	Cargo	Δ% vs 24
● Milano Malpensa	30,8%	5.504	▼ -3%
● Brescia Montichiari	12,1%	2.161	▼ -14%
● Napoli Capodichino	10,4%	1.858	▼ -7%
● Pisa S. Giusto	7,4%	1.326	▲ 36%
● Roma Fiumicino	7,4%	1.321	▲ 9%

Cargo – I Quarter 2025

International Scope - Share by geographical area

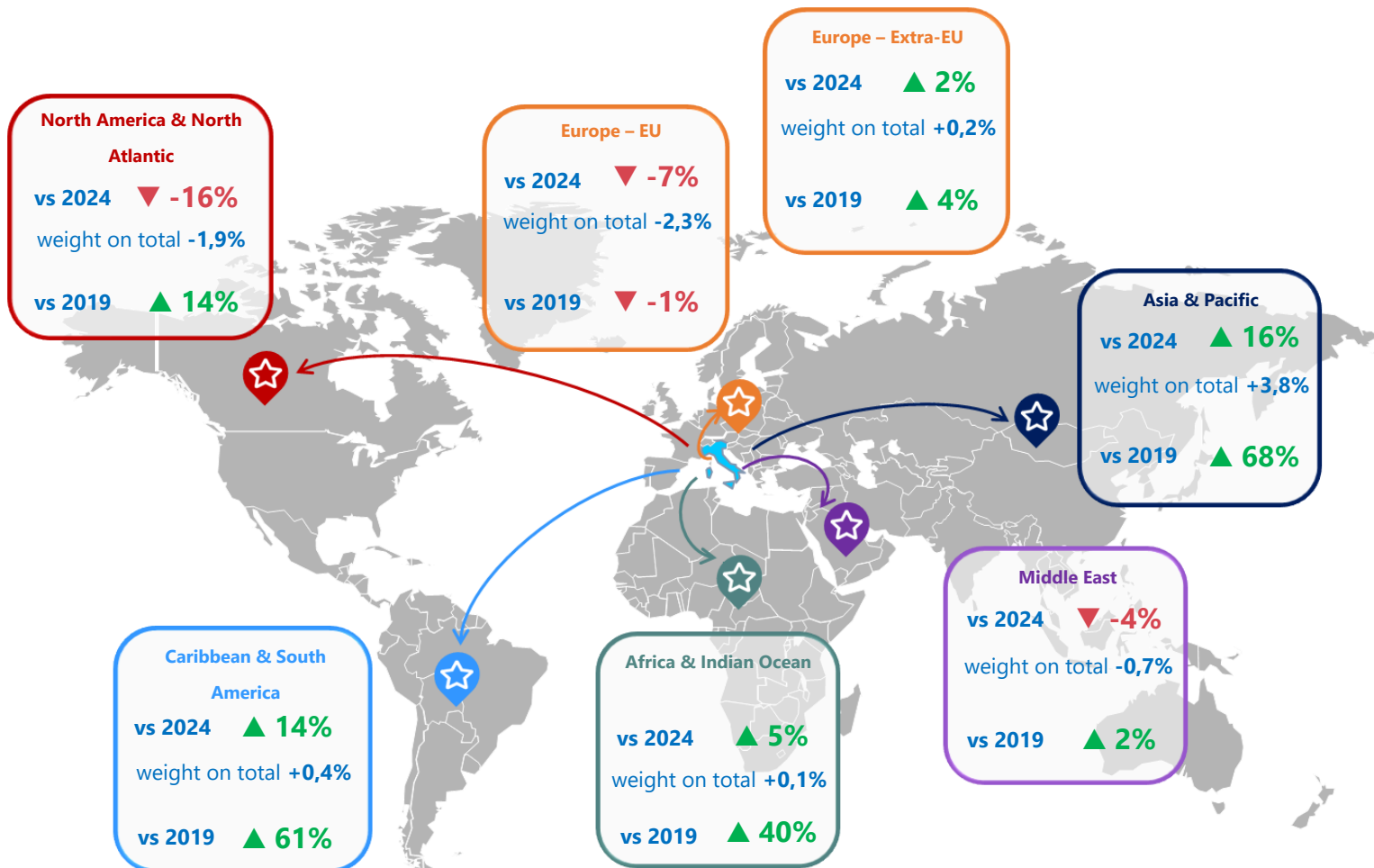
During I Quarter the **international cargo** air traffic recorded **262.237 tons**, corresponding to **94%** out of total. As compared to the same period of the previous year, there is **steady values**, with a variation of **-,4%**. Data are processed excluding national traffic, therefore the traffic share with European Union does not include domestic one (17.884 tons). The **Europe - EU** is the geographical area to which the most traffic is observed, with **Germany** being the first country and **Milano Malpensa - Hong Kong International** the main route.



Cargo – I Quarter 2025

International Scope - Change in traffic by geographical area

Data elaborated by geographical area show how, in **absolute** terms, the highest growth rate has been recorded in **Asia & Pacific**: **+16,5%** area, corresponding to an increase of total international traffic by +3,8%, meaning **+9.981** tons. Also in **relative** terms the **Asia & Pacific** has been the geographic area that had the greatest impact on total traffic: **+3,8%**.



Geographical Area

Index of countries covered by the elaborations

Europe – EU
Austria
Belgium
Bulgaria
Croatia
Cyprus
Czech Republic
Denmark
Estonia
Finland
France
Germany
Greece
Hungary
Ireland
Italy
Latvia
Lithuania
Luxembourg
Malta
Netherlands
Poland
Portugal
Romania
Slovakia
Slovenia
Spain
Sweden

Europe – Extra-EU
Albania
Armenia
Azerbaijan
Bosnia and Herzegovina
Georgia
Gibraltar
Iceland
Kosovo
Macedonia
Moldova
Monaco
Montenegro
Norway
Serbia
Switzerland
Turkey
United Kingdom

Caribbean & South America
Antigua and Barbuda
Argentina
Bahamas
Barbados
Brazil
Colombia
Cuba
Dominican Republic
Ecuador
Grenada
Guadeloupe
Jamaica
Martinique
Mexico
Saint Vincent and the Grenadines
Sint Maarten
Turks and Caicos Islands
Venezuela
Virgin Islands, U.S.

Middle East
Bahrain
Iran
Iraq
Israel
Jordan
Kuwait
Lebanon
Oman
Qatar
Saudi Arabia
United Arab Emirates

Asia & Pacific
Australia
Bangladesh
China
Hong Kong
India
Indonesia
Japan
Kazakhstan
Kyrgyzstan
Macao
Maldives
Pakistan
Singapore
South Korea
Sri Lanka
Taiwan
Tajikistan
Thailand
Turkmenistan
Uzbekistan
Vietnam

North America & North Atlantic
Canada
United States of America

Africa & Indian Ocean
Algeria
Cabo Verde
Cameroon
Congo
Côte d'Ivoire
Egypt
Equatorial Guinea
Ethiopia
Ghana
Guinea
Guinea-Bissau
Kenya
Liberia
Libya
Madagascar
Mauritius
Morocco
Mozambique
Niger
Nigeria
Senegal
Seychelles
South Africa
Tanzania
Togo
Tunisia
Uganda

*Edited by the Fare Supervision and Air Transport Statistics
Departement*

Dr. N. Rusciano
n.rusciano@enac.gov.it

Dr. R. Chichierchia
r.chichierchia@enac.gov.it

