Ente Nazionale per l'Aviazione Civile
Italian Civil Aviation Authority

AIR TRAFFIC DATA

2025

Executive Summary

CHARGES SUPERVISION AND AIR TRANSPORT STATISTICS DEPARTMENT

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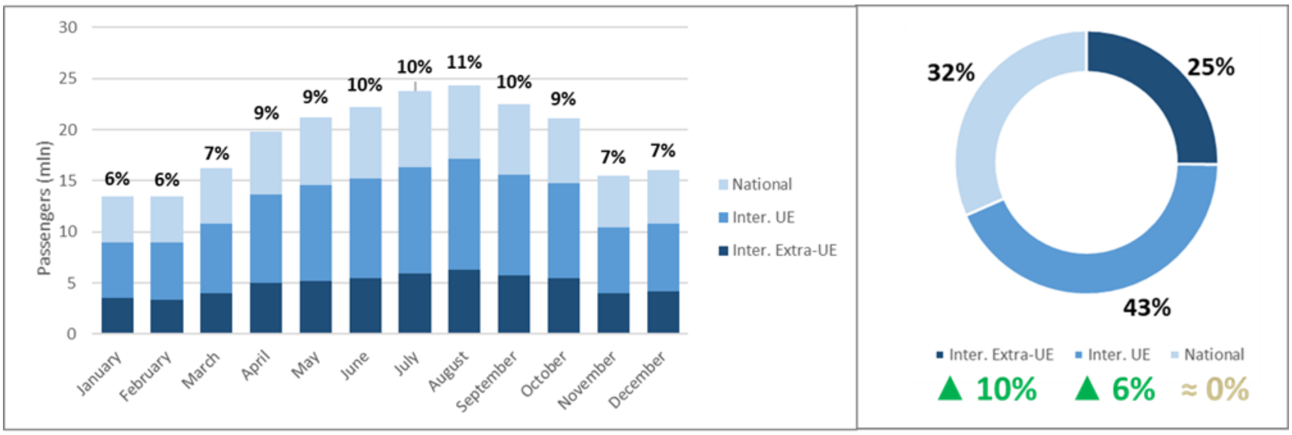
PASSENGERS

Passenger traffic across the 44 airports open to commercial traffic[1] stood at **229.740.554** units in **2025**, marking a significant <u>**increase**</u> compared to the 218.713.879 recorded in 2024. Overall, there was a traffic increase of **+5%**, equivalent to 11 million passengers.

Figure 1 – Distribution of passenger traffic



The *figure 1* shows the monthly distribution of passenger traffic by geographical area. Most flows are concentrated in the summer period (June – September), which accounts for 41% of the total annual traffic, peaking at 11% in August

Regarding **traffic composition by carrier type**, **low-cost** ones transported **63%** of total passengers (unchanged vs 2024), amounting to **145,4 million** (+6% vs 2024). Traffic on **legacy** accounted for **37%** (unchanged vs 2024), with **84,3 million** passengers (+3% vs 2024).

Traffic by airport (Domestic, EU, Extra-EU) shows a notable concentration in the top five airports, which represent over **54%** of passenger traffic. As shown in *Figure 2*, the leading airport by volume remains <u>**Roma Fiumicino**, which exceeded the 50-million passenger threshold[2] for the first time, reaching **50,9 million**[3]</u> with a market share of **22%** (unchanged vs 2024). This is followed, in order, by Milano Malpensa (14%; 31m), Bergamo Orio al Serio (7%; 17m), Napoli Capodichino (6%; 13m), and Catania Fontanarossa (5%; 12m). Among the top

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[1] <u>METHODOLOGICAL NOTE:</u> Data regarding the year 2024 has been adjusted to exclude volumes for Grosseto Airport, which is no longer certified pursuant to EU Regulation 139/2014 in 2025. This realignment is necessary to ensure the consistency of the scope of analysis and the correct comparability of traffic trends between the two periods.

[2] For better readability, statistics relating to passenger volumes (units) and cargo (tons) are expressed as whole numbers, applying the principle of convergent rounding (IEEE 754 Standard).

[3] The figure indicated includes arriving and departing passengers only. **Including the direct transit component**—excluded here for consistency of analysis—total traffic at **Rome Fiumicino Airport** stands at **51,3 million.** For full details on flows, including transit, please refer to *Table 1* (page 9).

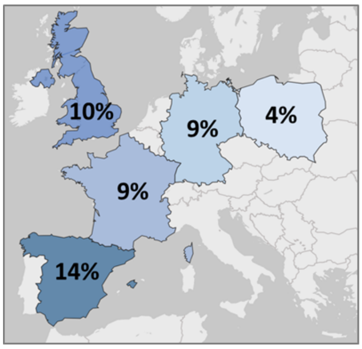
airports, positive growth rates were recorded by Milano Malpensa (+9%), Napoli Capodichino (+5%), and Roma Fiumicino (+4%). Traffic at Catania Fontanarossa remained substantially unchanged, while volumes at Bergamo Orio al Serio showed a slight decline (-2%).

Figure 2 – Passenger traffic (Domestic, EU, Extra-EU) by airport – Top 5

Airport	Δ vs 24	Pax apt	Main routes	Pax route
Roma Fiumicino	▲ 4%	50.872.356	Roma Fiumicino - Madrid Barajas	1.981.405
Milano Malpensa	▲ 9%	31.234.229	Milano Malpensa - Barcelona El Prat	1.293.311
Bergamo Orio al Serio	▼ -2%	16.932.031	Bergamo Orio al Serio - Tirana Rinas	656.952
Napoli Capodichino	▲ 5%	13.257.401	Napoli Capodichino - Milano Malpensa	517.944
Catania Fontanarossa	≈ 0%	12.363.135	Catania Fontanarossa - Roma Fiumicino	1.874.410

The distribution by geographical area shows that **<u>international traffic</u>** (EU and Extra-EU) represents the largest component, with **157,2 million** passengers, an increase of **+8%** compared to 2024 and a **share** of **68%** (vs 67% in 2024), distributed as follows: EU 43%; Extra-EU 25%. There is a <u>notable concentration</u> in the top five airports, which together cover 63% of international traffic. The geographical area with the highest flows is the European Union (43%). As shown in *Figure 3*, the leading country by volume is **Spain**, with a share of 14% (22,5 million passengers) and Roma Fiumicino – Madrid Barajas as the main route. At an international level (EU and Extra-EU), this is followed by the United Kingdom (10%; 16m), France (9%; 14m), Germany (9%; 13,5m), and Poland (4%; 7m). Overall, connections to/from the top five countries represent approximately 49% of international traffic and show positive growth rates compared to 2024, peaking at +32% for Poland, which replaces the United States in the "*top*

Figure 3 – International passenger traffic – Top 5



Country	Δ vs 24	Pax country	Main routes	Pax route
Spain	▲ 9%	22.553.564	Roma Fiumicino - Madrid Barajas	1.981.405
United Kingdom	▲ 5%	16.318.624	Roma Fiumicino - London Gatwick	820.685
France	≈ 0%	13.778.592	Roma Fiumicino - Paris Orly	1.039.274
Germany	▲ 4%	13.590.739	Roma Fiumicino - Frankfurt Intl.	786.241
Poland	▲ 32%	6.808.924	Roma Fiumicino - Warsaw Intl.	465.095

<u>Domestic traffic</u> accounts for **32%** of the total (vs 33% in 2024), with **72,5 million** passengers, remaining substantially **unchanged** compared to the previous year. There is a <u>notable concentration</u> in the top five airports, which together cover over 46% of domestic traffic. As shown in *Figure 4*, the leading airport by volume is confirmed as **Roma Fiumicino** with a **share** of **14%** (10 million passengers), followed by Catania Fontanarossa (10%; 7m), Palermo Punta Raisi (8%; 6m), Milano Linate (7%; 4,8m), and Milano Malpensa (7%; 4,7m). Among the top five airports, only Milano Malpensa shows a positive growth rate compared to 2024, with an increase of +7%. Volumes at Palermo Punta Raisi remained substantially unchanged, while declines were recorded at Roma Fiumicino, Catania Fontanarossa, and Milano Linate.

Figure 4 – National passenger traffic – Top 5

	Airport	Δ vs 24	Pax apt	Main routes	Pax route
	Roma Fiumicino	▼ -2%	10.259.848	Catania Fontanarossa - Roma Fiumicino	950.376
	Catania Fontanarossa	▼ -2%	7.412.555	Roma Fiumicino - Catania Fontanarossa	926.782
	Palermo Punta Raisi	≈ 0%	6.145.231	Roma Fiumicino - Palermo Punta Raisi	828.909
	Milano Linate	▼ -15%	4.769.910	Palermo Punta Raisi - Roma Fiumicino	824.821
	Milano Malpensa	▲ 7%	4.729.894	Catania Fontanarossa - Milano Malpensa	542.330

CARGO

Cargo traffic (freight and mail) across the 44 airports open to commercial traffic stood at **1.242.360 tonnes** in 2025, showing an **increase** compared to the 1.213.246 tonnes recorded in 2024. Overall, there was a traffic increase of **+2%**, equivalent to +29 thousand tonnes.

Figure 5 – Cargo traffic distribution

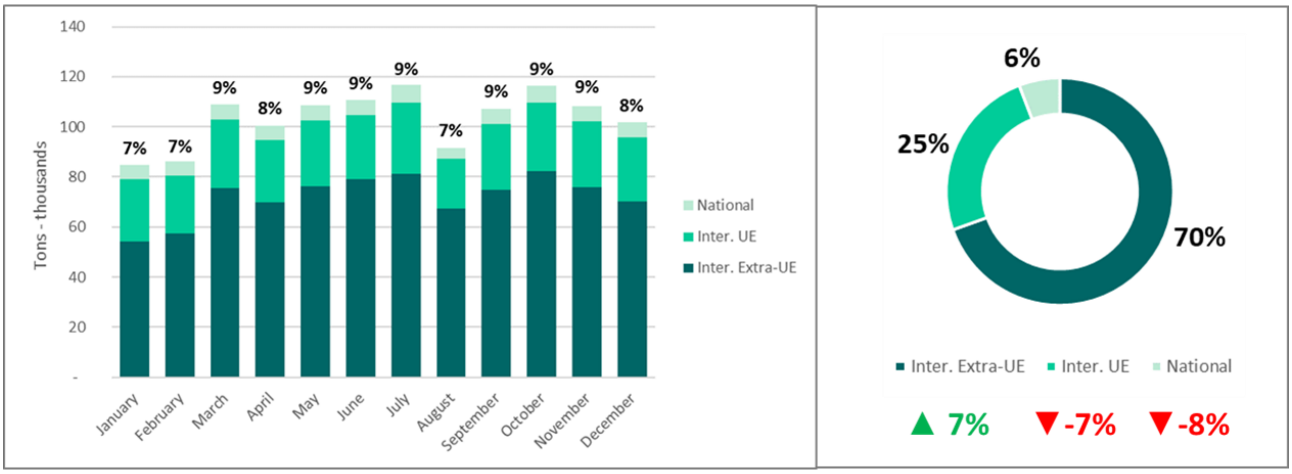


Figure 5 shows the monthly distribution of cargo traffic by geographical area. Unlike passenger traffic (see *Figure 1*), it does not highlight a concentration in a particular period of the year.

Regarding **traffic composition by carrier type**, the share of **legacy** ones is predominant: **99.2%**, equal to 1.2 million tonnes. Traffic on **low-cost** carriers stood at **0,8%** (10.500 tonnes), although it recorded an increase of **+59%** compared to the previous year (0,4%).

Traffic by airport (Domestic, EU, Extra-EU) highlights a significant concentration in the top five airports, which together cover **93%** of the air cargo market.

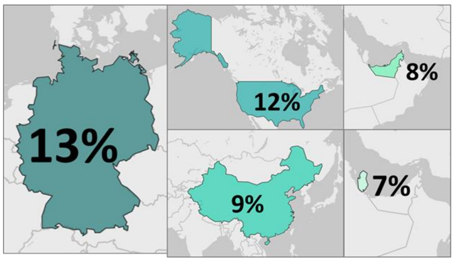
As shown in *Figure 6*, the leading airport by volume is confirmed as **Milano Malpensa** with a **share** of **61%** (over 764 thousand tonnes), followed by Roma Fiumicino (22%; 273k), Venezia Tessera (4,4%; 55k), Bologna Borgo Panigale (3,5%; 44k), and Bergamo Orio al Serio (2%; 24k). Among the top five airports, only Bologna shows a negative growth rate compared to the previous year (-3%), while flows at Venezia Tessera remained stable. Positive trends were recorded for Roma Fiumicino (+1%), Milano Malpensa (+4%), and Bergamo Orio al Serio (+7%), which replaces Brescia Montichiari in the "*Top 5*".

Figure 6 – Cargo Traffic (Domestic, EU, Extra-EU) by airport – Top 5

Airport	Δ vs 24	Tons apt	Main routes	Route tons
Milano Malpensa	▲ 4%	764.171	Milano Malpensa - Hong Kong Intl	65.669
Roma Fiumicino	≈ 1%	273.444	Roma Fiumicino - Dubai Intl	19.662
Venezia Tessera	≈ 0%	54.900	Venezia Tessera - Cologne	10.396
Bologna Borgo Panigale	▼ -3%	43.951	Bologna Borgo Panigale - Leipzig-Halle	10.630
Bergamo Orio al Serio	▲ 7%	24.518	Bergamo Orio al Serio - Cologne	17.547

The distribution by geographical area shows that __**international traffic**__ (EU and Extra-EU) represents the largest component, with **1.169.876 tonnes**, equal to **94%** of the total (Extra-EU 69%; EU 25%), with volumes **increasing compared to 2024**, driven by the Extra-EU component (+7%). There is a relevant concentration in the top five airports, which together cover 96% of international traffic. The geographical area with the highest traffic is **Non-EU** (69%). As shown in *Figure 7*, the leading country by volume is **Germany**, with a share of 13% (153 thousand tonnes) and Milano Malpensa – Leipzig/Halle as the main route. At an international level (EU and Extra-EU), this is followed by the USA (12%; 137k), China (9%; 108k), United Arab Emirates (8%; 96k), and Qatar (7%; 79k). Overall, connections to/from the top five countries represent approximately half of international traffic. The trend in handled volumes shows a decline for connections with Germany and the United States (both -5%). Conversely, positive trends were recorded for China (+12%), the United Arab Emirates (+8%), and Qatar (+1%).

Figure 7 – International Cargo Traffic – Top 5

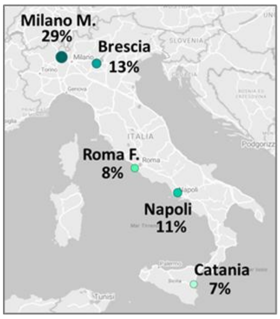


Country	Δ vs 24	Tons country	Main routes	Route tons
Germany	▼ -5%	153.449	Milano Malpensa - Leipzig-Halle	42.851
United States of America	▼ -5%	137.339	Roma Fiumicino - New York JFK Intl	20.816
China	▲ 12%	108.242	Milano Malpensa - Shangai Phudong	22.361
United Arab Emirates	▲ 8%	95.650	Roma Fiumicino - Dubai Intl	15.347
Qatar	▲ 1%	79.181	Milano Malpensa - Doha Hamad Intl	56.588

__**Domestic traffic**__ represents **6%** of the total, with **72.484 tonnes** and a **decrease** of **-8%** compared to 2024. There is a relevant concentration in the top five airports, which together cover over 67% of domestic traffic (vs 74% in 2024).

The leading airport by volume is confirmed as **Milano Malpensa** with a **share** of **29%** (approx. 21k tonnes), followed by Brescia Montichiari (13%; 9,7k), Napoli Capodichino (11%; 8k), Roma Fiumicino (8%; 5,5k), and Catania Fontanarossa (7%; 5k). The top five airports all show negative growth rates compared to the previous year, with the exception of Roma Fiumicino (+3%).

Figure 8 – Domestic cargo traffic – Top 5



Airport	Δ vs 24	Tons apt	Main routes	Route tons
Milano Malpensa	▼ -8%	21.085	Milano Malpensa - Napoli Capodichino	4.727
Brescia Montichiari	▼ -6%	9.662	Napoli Capodichino - Milano Malpensa	3.524
Napoli Capodichino	▼ -5%	7.817	Pisa S. Giusto - Milano Malpensa	3.231
Roma Fiumicino	▲ 3%	5.504	Milano Malpensa - Ancona Falconara	2.428
Catania Fontanarossa	≈ -1%	4.712	Bologna Borgo Panigale - Milano Malpensa	2.214

AIRPORT TRAFFIC TABLE

AIRPORTS OPEN TO COMMERCIAL TRAFFIC

Total international and domestic **traffic - 2025**

Scheduled, charter, air taxi and general aviation services

(arrivals + departures)

	AIRPORT	Passengers (n.)		Transits (n.)		Cargo (t.)		Flights (n.)	
		Number	Δ% 2025-24	Number	Δ% 2025-24	Tons	Δ% 2025-24	Number	Δ% 2025-24
1	Albenga	3.043	16,5%	7	0,0%	0,0	0,0%	2.822	5,3%
2	Alghero Fertilia	1.768.933	9,9%	1.490	4,5%	12,5	890,7%	13.151	7,4%
3	Ancona Falconara	605.630	1,0%	1.005	89,3%	6.359,2	-3,2%	10.835	-9,2%
4	Aosta	5.249	2,0%	0	0,0%	0,0	0,0%	11.623	0,4%
5	Bari Palese Macchie	7.990.916	9,6%	17.286	32,8%	2.008,6	-13,3%	56.683	5,2%
6	Bergamo Orio al Serio	16.932.031	-2,4%	5.948	0,0%	24.518,4	6,7%	104.655	-4,8%
7	Bologna Borgo Panigale	11.210.132	3,3%	9.033	97,8%	43.950,9	-3,3%	84.946	1,5%
8	Bolzano	132.969	25,3%	128	-38,2%	3,4	-22,3%	16.662	12,0%
9	Brescia Montichiari	8.314	-4,0%	0	0,0%	21.147,3	-8,8%	10.796	-8,5%
10	Brindisi Casale	3.451.990	1,7%	9.173	65,0%	387,0	71,9%	24.685	-0,7%
11	Cagliari Elmas	5.287.294	1,7%	3.510	31,7%	4.322,3	7,7%	39.656	0,7%
12	Catania Fontanarossa	12.363.135	0,2%	6.281	-34,3%	5.086,0	-1,9%	81.040	-1,9%
13	Comiso	135.300	-48,5%	640	-7,8%	0,7	70200,0%	2.338	-28,2%
14	Crotone	344.478	24,5%	0	0,0%	0,0	0,0%	2.803	20,1%
15	Cuneo Levaldigi	99.746	-5,1%	161	-42,7%	0,0	0,0%	3.619	18,7%
16	Firenze Peretola	3.835.125	9,4%	77	-3,8%	28,8	32,3%	45.540	9,3%
17	Foggia	69.549	11,4%	0	-100,0%	0,0	-100,0%	2.026	-12,6%
18	Forlì	118.623	-11,5%	542	4827,3%	0,0	-100,0%	3.035	23,2%
19	Genova Sestri	1.587.761	18,1%	1.587	-18,3%	24,2	-33,9%	16.885	7,9%
20	Lamezia Terme	3.071.887	12,3%	8.786	13,3%	1.588,2	-10,3%	22.372	11,9%
21	Lampedusa	360.255	2,4%	0	-100,0%	15,1	-8,5%	7.545	2,8%
22	Marina di Campo	9.696	55,4%	223	-27,8%	0,0	0,0%	5.601	21,8%
23	Milano Linate	11.130.047	4,5%	838	-52,8%	1.772,2	-16,5%	122.247	3,6%
24	Milano Malpensa	31.234.229	8,6%	150.806	-6,2%	764.171,4	4,4%	226.304	5,5%
25	Napoli Capodichino	13.257.401	4,9%	12.733	73,3%	9.281,5	7,0%	89.273	2,9%
26	Olbia	4.159.957	7,2%	2.942	256,6%	1.035,9	-7,1%	43.942	5,6%
27	Palermo Punta Raisi	9.243.939	3,4%	11.938	-7,1%	1.531,1	6,6%	64.503	-0,4%
28	Pantelleria	212.376	4,0%	0	-100,0%	12,8	-5,3%	4.431	3,8%
29	Parma	145.343	8,2%	158	-56,1%	0,0	0,0%	5.062	10,9%
30	Perugia	626.902	16,2%	0	-100,0%	0,0	0,0%	6.669	1,3%
31	Pescara	997.833	26,0%	1.296	17,6%	5,4	78,4%	9.600	13,2%
32	Pisa S. Giusto	5.944.769	7,8%	6.699	42,6%	12.008,5	-5,0%	45.974	7,0%
33	Reggio Calabria	988.979	56,5%	64	-73,8%	68,5	79,8%	9.870	34,3%
34	Rimini Miramare	420.969	29,7%	338	-30,5%	2,0	1328,6%	4.794	20,5%
35	Roma Ciampino	3.981.612	3,2%	0	0,0%	10.114,2	-30,4%	41.757	-0,8%
36	Roma Fiumicino	50.872.356	4,5%	433.630	-15,7%	273.444,3	0,8%	322.674	2,3%
37	Salerno Pontecagnano	377.823	112,1%	374	281,6%	2,4	-4,1%	6.360	107,6%
38	Taranto Grottaglie	721	-51,5%	0	-100,0%	3.462,3	55,9%	745	-14,7%
39	Torino Caselle	5.039.075	6,7%	3.987	-17,7%	194,6	104,0%	46.982	9,1%
40	Trapani Birgi	1.015.434	-6,3%	804	70,3%	36,6	11939,5%	8.453	-5,9%
41	Treviso S. Angelo	3.199.426	5,0%	505	0,2%	0,1	6300,0%	23.708	9,5%
42	Trieste Ronchi dei Legionari	1.650.178	25,2%	786	-12,5%	7,9	-92,9%	14.253	15,6%
43	Venezia Tessera	11.839.436	2,2%	9.698	52,1%	54.899,7	0,2%	87.444	-1,5%
44	Verona Villafranca	4.009.693	8,7%	18.141	28,0%	855,9	4,3%	30.770	5,4%
	TOTAL	**229.740.554**	**5,0%**	**721.614**	**-8,3%**	**1.242.359,9**	**2,4%**	**1.785.133**	**8,4%**