Ente Nazionale per l'Aviazione Civile
Italian Civil Aviation Authority

QUARTERLY REPORT

TRAFFIC DATA

II Quarter 2023

Edited by the Economics Studies and Analysis Department

Summary

Traffic Data Report

Quarterly Flows

QUARTERLY DATA

II Quarter

2023

CUMULATED DATA

I - II Quarter

2023

Key data - II Quarter 2023

Passengers, cargo and flights

PASSENGERS

53.524.108

▲ 16% vs 2022

▲ 3% vs 2019

CARGO

268.101

▼ -4% vs 2022

≈ -1% vs 2019

FLIGHTS

434.456

▲ 6% vs 2022

▼ -2% vs 2019

Key data - II Quarter 2023

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

GEOGRAPHICAL SCOPE

NATIONAL	INT. UE	INT. EXTRA-UE
18.750.990	22.636.965	12.136.153
▲ 4% vs 2022	▲ 17% vs 2022	▲ 39% vs 2022

CARRIER TYPE

LEGACY	LOW-COST
22.861.429	30.662.679
▲ 58% vs 2022	▼ -3% vs 2022

TOP 3 AIRPORTS

PASSENGERS	CARGO	FLIGHTS
Roma Fiumicino 10.637.828	Milano Malpensa 171.271	Roma Fiumicino 68.673
Milano Malpensa 6.686.930	Roma Fiumicino 46.288	Milano Malpensa 52.352
Bergamo Orio al Serio 4.214.966	Venezia Tessera 11.562	Milano Linate 29.193

Key data - II Quarter 2023

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

GEOGRAPHICAL SCOPE

NATIONAL	INT. UE	INT. EXTRA-UE
35%	42%	23%
▼ -4 pt. perc. vs 2022	≈ 0 pt. perc. vs 2022	▲ 4 pt. perc. vs 2022

CARRIER TYPE

LEGACY	LOW-COST
43%	57%
▲ 11 pt. perc. vs 2022	▼ -11 pt. perc. vs 2022

TOP 3 AIRPORTS

PASSENGERS	CARGO	FLIGHTS
Roma Fiumicino 20% ▲ 3 pt. perc.	Milano Malpensa 64% ▼ -3 pt. perc.	Roma Fiumicino 16% ▲ 2 pt. perc.
Milano Malpensa 12% ≈ 0 pt. perc.	Roma Fiumicino 17% ▲ 4 pt. perc.	Milano Malpensa 12% ≈ 0 pt. perc.
Bergamo Orio al Serio 8% ≈ 0 pt. perc.	Venezia Tessera 4% ≈ 0 pt. perc.	Milano Linate 7% ≈ 0 pt. perc.

Key data - II Quarter 2023

Comparison to same period 2022 and 2019

The nationwide air traffic data related to II Quarter 2023 have been compared to the same period of the previous year (2022) and to 2019, as pre-Pandemic benchmark. Here following the **scheduled** and **charter** traffic data related to passengers, cargo and flights.

Traffic category	2019	2022	2023	Δ% 2022	Δ% 2019	
Passengers (units)	51.952.227	46.048.299	53.524.108	▲ 16%	▲ 3%	
Cargo (tons)	270.695	278.729	268.101	▼ -4%	≈ -1%	
Flights (units)	442.945	410.973	434.456	▲ 6%	▼ -2%	

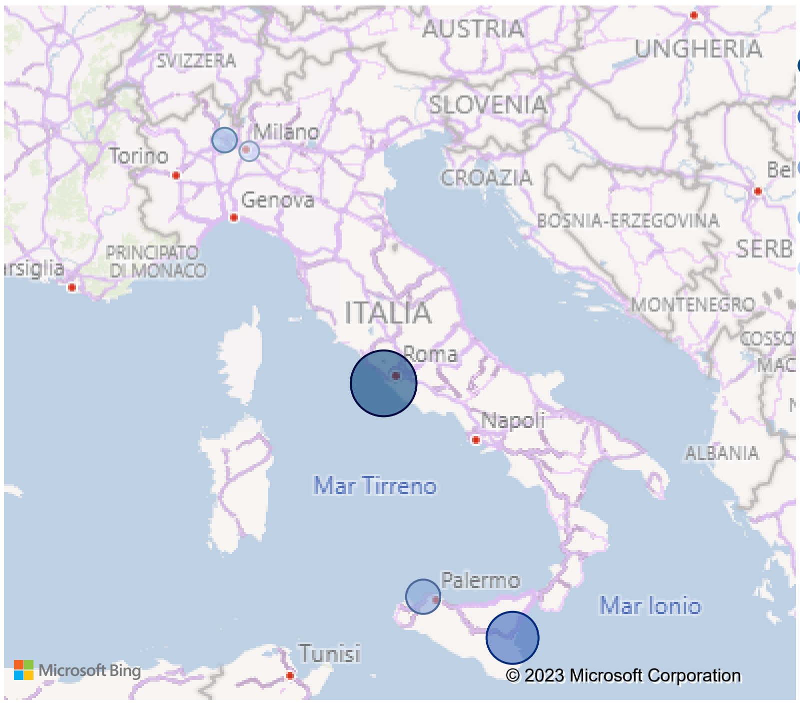
Traffic data related to **passengers** show as during **II Quarter 2023** about **53,5 M** of persons have been moved, recording an **increase** of **+16,2%** compared to the same period of last year. Assuming 2019 as benchmark, it results that the passengers sector **has recovered pre-Pandemic values**, with a positive trend of **+3,0%** compared to II Quarter 2019.

As far as **cargo** sector concerns, during **II Quarter 2023** air traffic reached about **268,1 K tons** , recording a **decrease** of **-3,8%** compared to the same period of the previous year. Assuming as benchmark 2019, cargo sector **has not recovered pre-Pandemic values** , with a negative trend of **-1,0%** compared to II Quarter 2019.

Passengers - II Quarter 2023

National Scope - Top-5 Airports

During the II Quarter the **national passengers** air traffic recorded 18.750.990 units, corresponding to **35%** out of the total and an increase of +4,5% compared to the same period of the previous year. **Top five airports** reached a traffic of **8.466.326 units**, accounting for the **45%** out of total domestic passengers traffic, with an increase of **+5,0%** compared to II Quarter 2022. **Roma Fiumicino** is the first airport in terms of national air traffic, with a market share of 12%, which matches to 2.226.434 passengers. Connections Catania Fontanarossa - Roma Fiumicino represent the main route.

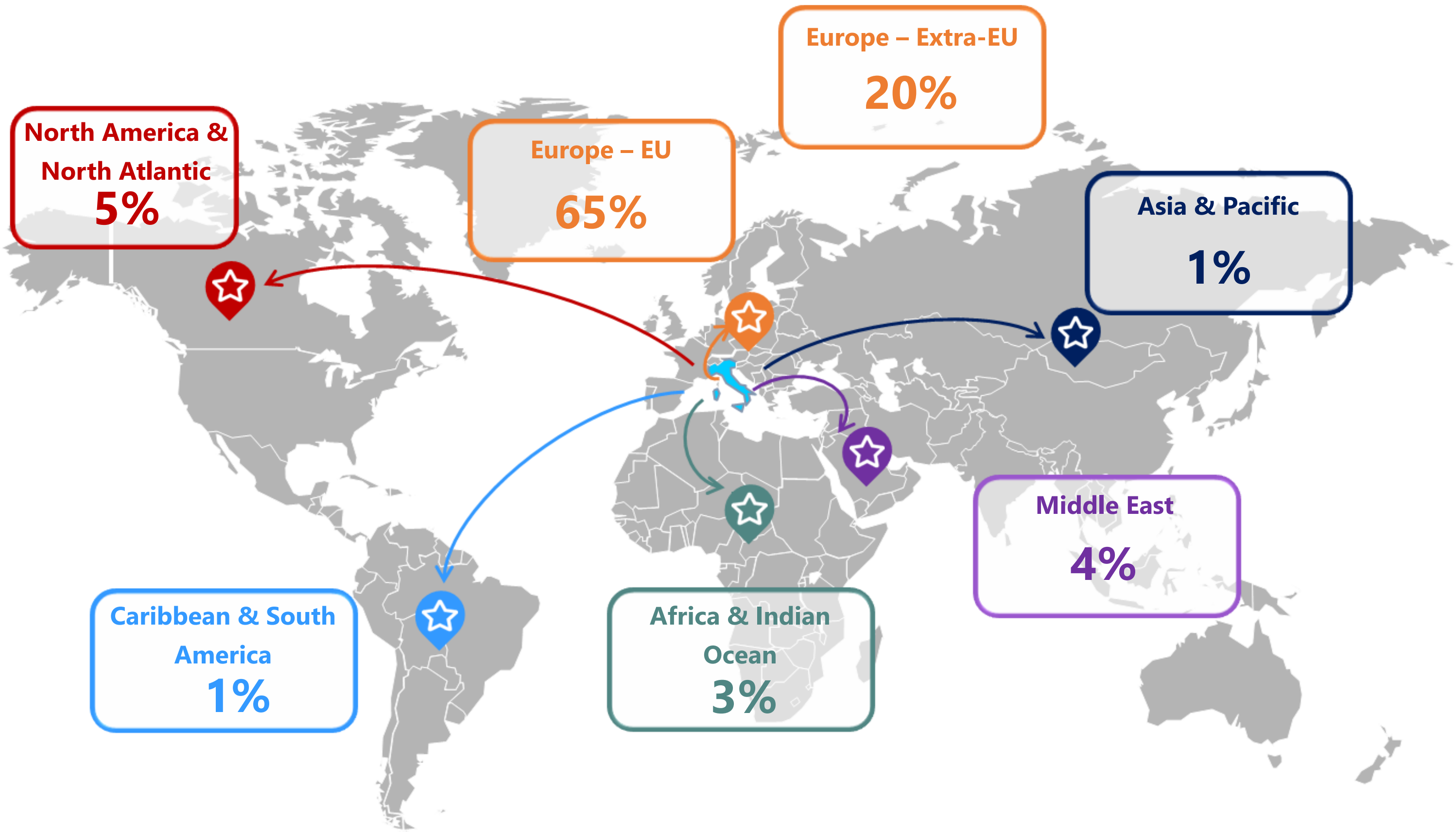


Airport	Share	Pax	Δ% vs 22
Roma Fiumicino	11,9%	2.226.434	▲ 22%
Catania Fontanarossa	10,4%	1.949.469	▲ 3%
Palermo Punta Raisi	8,5%	1.592.336	▲ 8%
Milano Malpensa	7,5%	1.398.361	▼ -18%
Milano Linate	6,9%	1.299.726	▲ 26%

Passengers - II Quarter 2023

International Scope - Share by geographical area

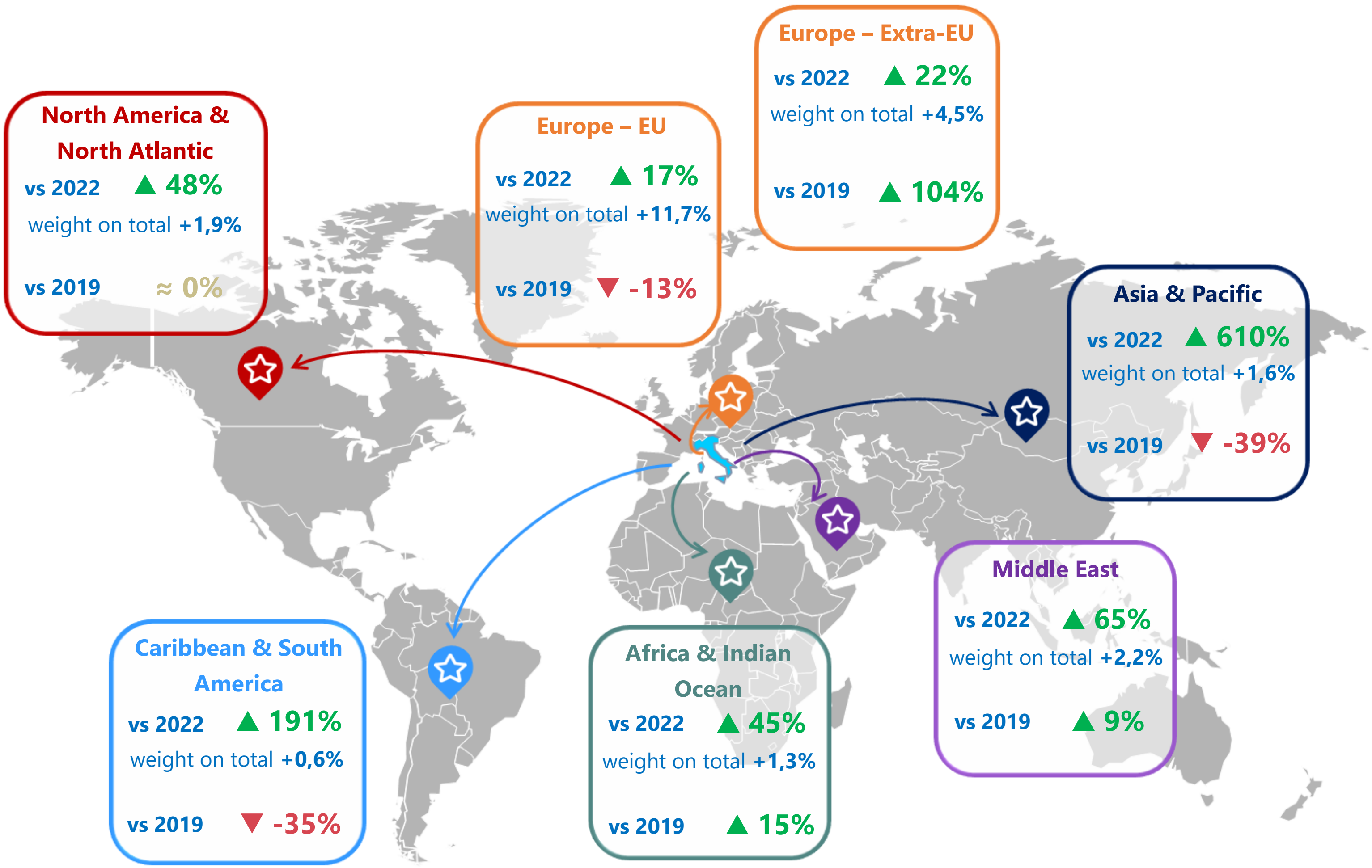
During the II Quarter the **international passengers** traffic recorded **34.773.118 units**, corresponding to **65%** out of total. As compared to the same period of the previous year, there is an **increase** of **+23,7%** . Data have been processed excluding national traffic, therefore the traffic share with European Union does not include domestic one (18.750.990 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 - II Quarter 2023

International Scope - Change in traffic by geographical area

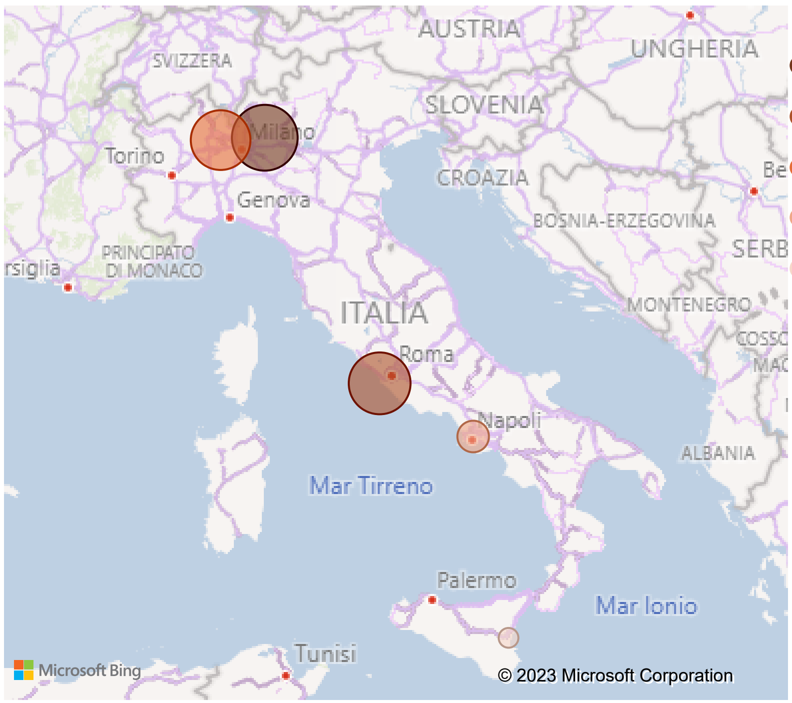
Data elaborated by geographical area show how, in **absolute** terms, the highest growth rate has been recorded in **Asia & Pacific** area: **+610,3%** , corresponding to an increase of total international traffic by +1,6%, meaning **+443.118** passengers. In **relative** terms, instead, the **Europe - EU** has been the geographic area that had the greatest impact on total traffic: **+11,7%** , meaning **+3.278.781** passengers.



Passengers - II Quarter 2023

Low-cost Carriers

During the II Quarter the **low-cost** passengers air traffic recorded 30.662.679 units, corresponding to **57%** out of the total and a decrease of **-2,5%** 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 decreased by 11 percentage points . **Top five airports** reached a traffic of **15.950.699 units**, accounting for the **52%** out of total low-cost passengers traffic, with steady values -,2% compared to II Quarter 2022. **Bergamo Orio al Serio** is the first airport in terms of low-cost air traffic, with a market share of 13%, which matches to 3.852.695 passengers. Connections Roma Fiumicino - Paris Orly represent the main route.

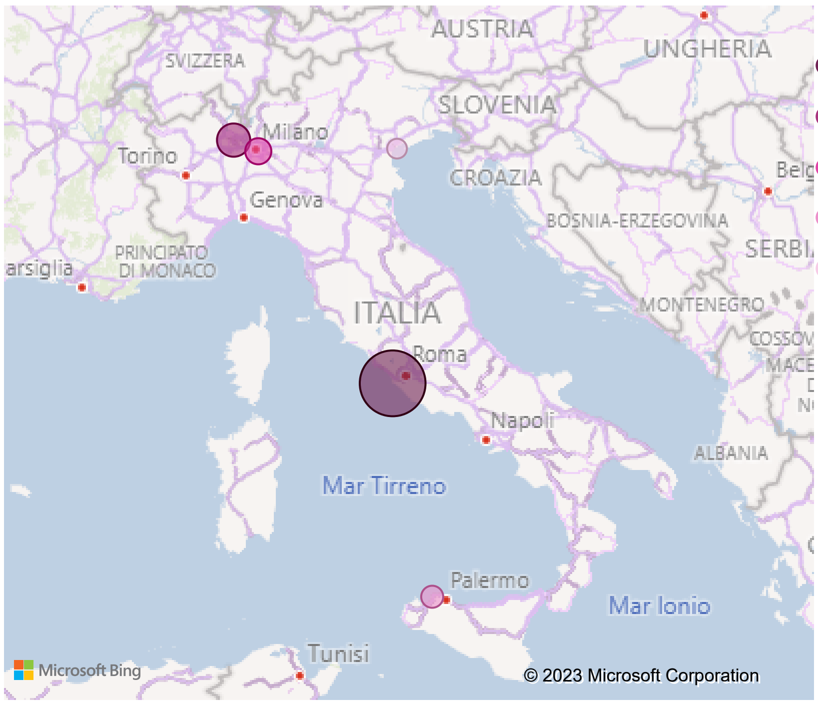


Airport	Share	Pax	Δ% vs 22
Bergamo Orio al Serio	12,6%	3.852.695	▲ 11%
Roma Fiumicino	12,1%	3.707.396	≈ 1%
Milano Malpensa	11,8%	3.628.991	▼ -6%
Napoli Capodichino	8,5%	2.597.455	≈ 0%
Catania Fontanarossa	7,1%	2.164.162	▼ -9%

Passengers - II Quarter 2023

Legacy Carriers

During II Quarter the **legacy** passengers air traffic recorded 22.861.429 units, corresponding to **43%** out of the total and an increase of **+57,6%** 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 increased by 11 percentage points . **Top five airports** reached a traffic of **15.391.733 units**, accounting for the **67%** out of total legacy passengers traffic, with an increase of +55,0% compared to II Quarter 2022. **Roma Fiumicino** is the first airport in terms of legacy air traffic, with a market share of 30%, which matches to 6.930.432 passengers. Connections Palermo Punta Raisi - Roma Fiumicino represent the main route.

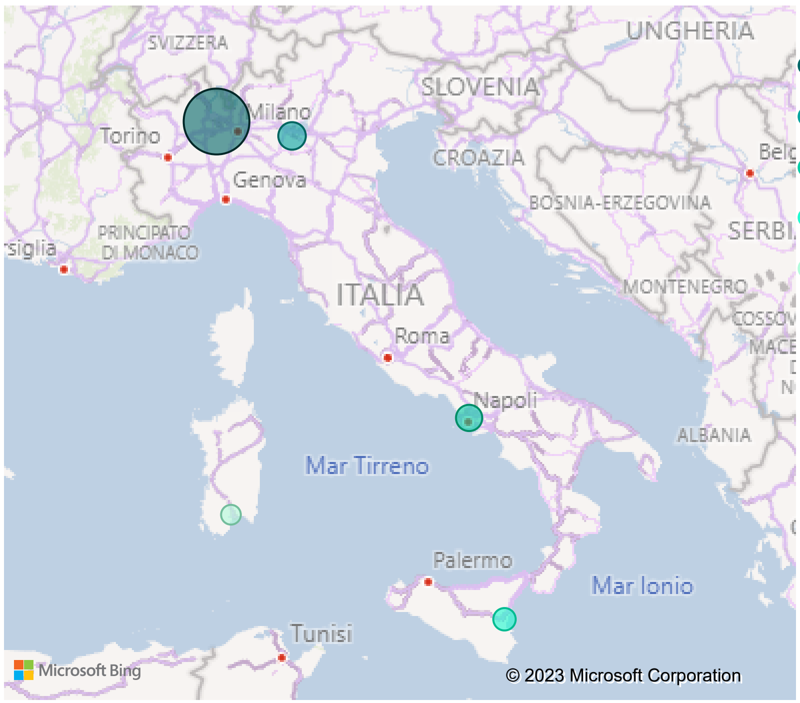


Airport	Share	Pax	Δ% vs 22
Roma Fiumicino	30,3%	6.930.432	▲ 63%
Milano Malpensa	13,4%	3.057.939	▲ 57%
Milano Linate	9,7%	2.214.787	▲ 42%
Palermo Punta Raisi	7,6%	1.730.716	▲ 57%
Venezia Tessera	6,4%	1.457.859	▲ 38%

Cargo - II Quarter 2023

National Scope - Top-5 Airports

During II Quarter the **national cargo** air traffic recorded 22.440 tons, corresponding to **8%** out of total and a decrease of -12,8% compared to the same month of the previous year. **Top five airports** reached a traffic of **15.462 tons**, accounting for the **69%** out of total domestic cargo traffic, with a decrease of **-11,4%** compared to II Quarter 2022. **Milano Malpensa** is the first airport in terms of national cargo air traffic, with a market share of 34%, which matches to 7.521 tons. Connections Milano Malpensa - Napoli Capodichino represent the main route.

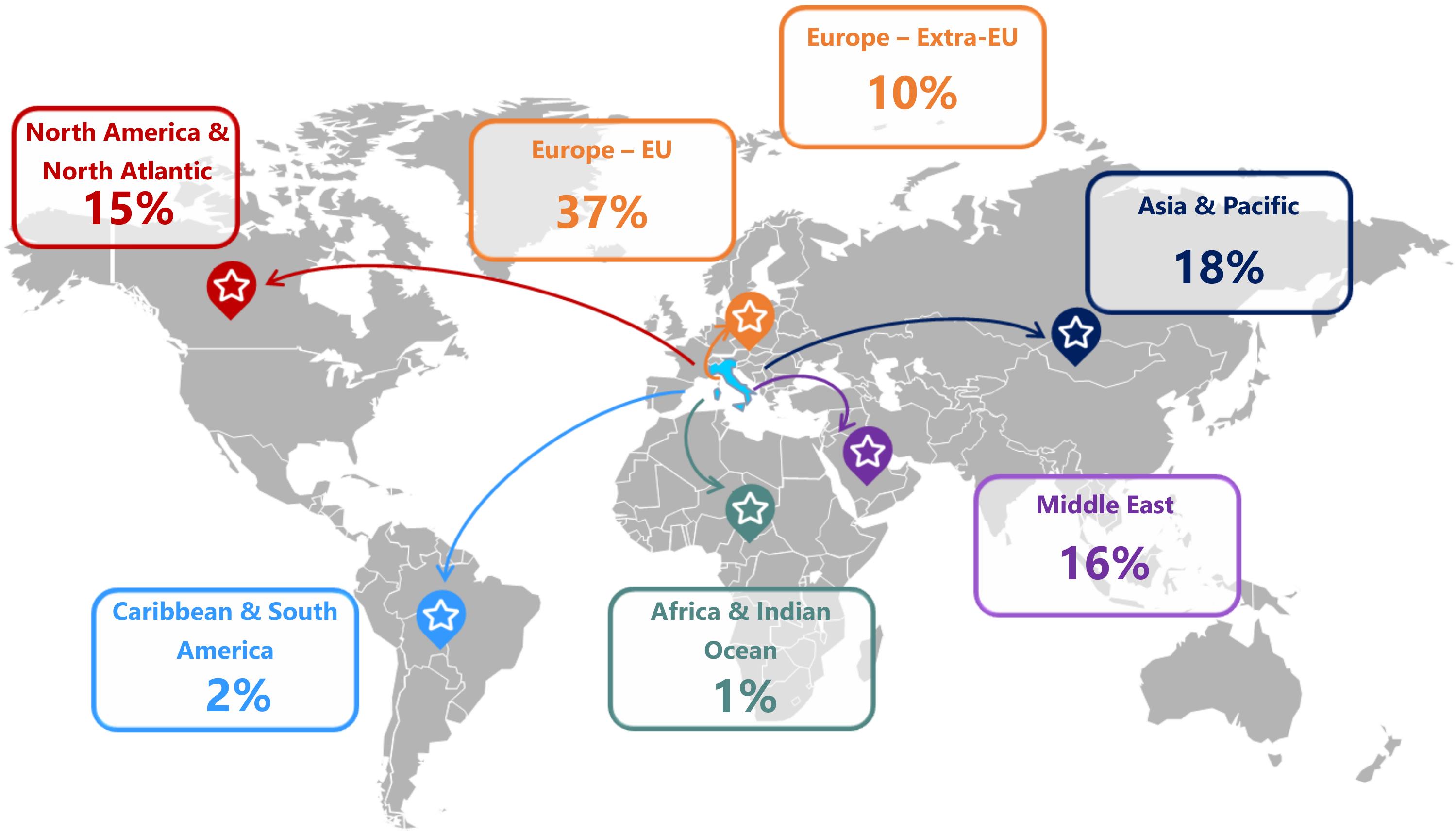


Airport	Share	Cargo	Δ% vs 22
Milano Malpensa	33,5%	7.521	▼ -4%
Brescia Montichiari	10,9%	2.454	▼ -20%
Napoli Capodichino	10,2%	2.286	▼ -17%
Catania Fontanarossa	7,9%	1.776	▼ -18%
Cagliari Elmas	6,3%	1.425	▼ -13%

Cargo - II Quarter 2023

International Scope - Share by geographical area

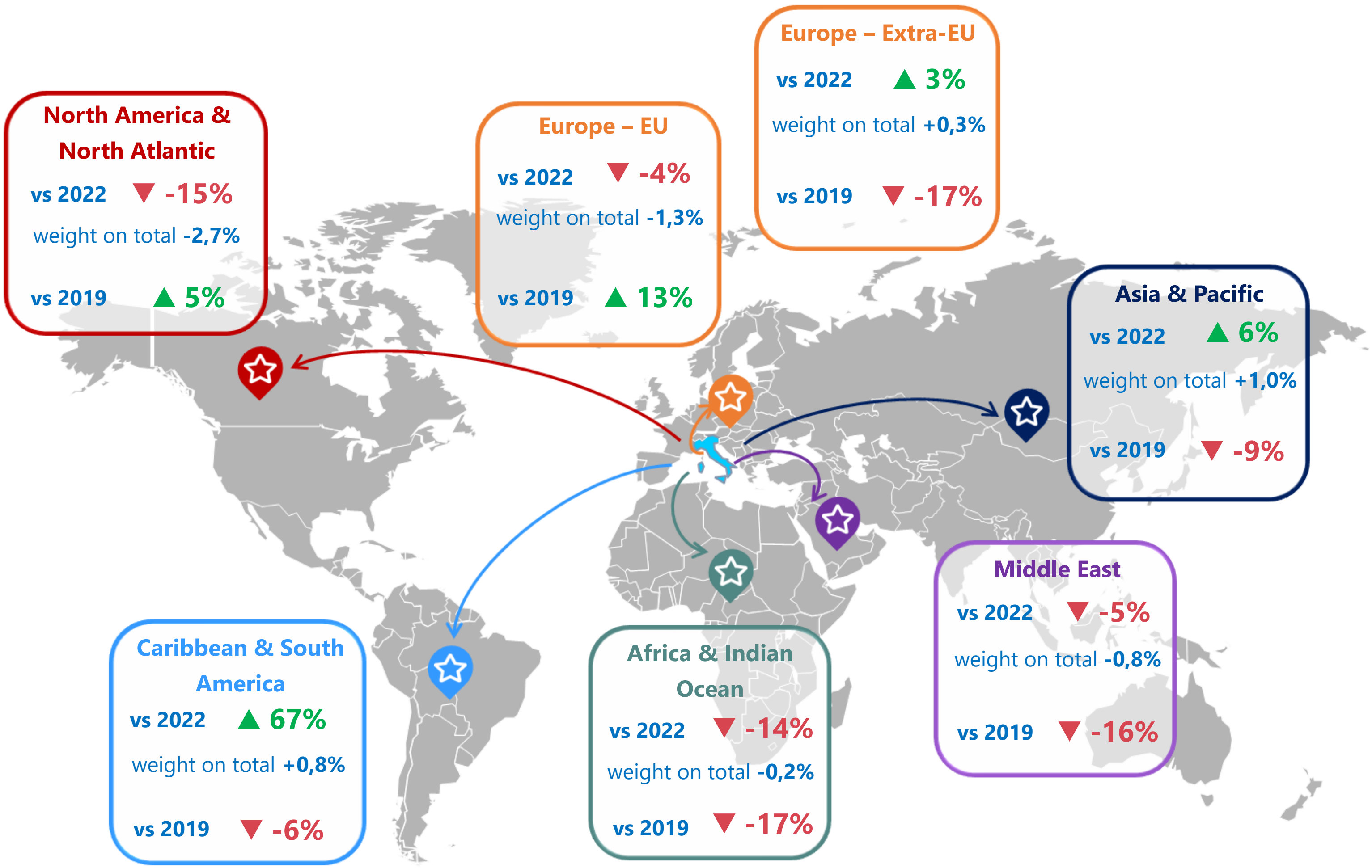
During II Quarter the **international cargo** air traffic recorded **245.661 tons**, corresponding to **92%** out of total. As compared to the same period of the previous year, there is a **decrease** of **-2,9%** . Data are processed excluding national traffic, therefore the traffic share with European Union does not include domestic one (22.440 tons). The **Europe - EU** is the geographical area to which the most traffic is observed, with **Germany** being the first country and **Milano Malpensa - Leipzig-Halle** the main route.



Cargo - II Quarter 2023

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 **Caribbean & South America**: **+67,5%** area, corresponding to an increase of total international traffic by +0,8%, meaning **+2.096** tons. In **relative** terms, instead, the **Asia & Pacific** has been the geographic area that had the greates impact on total traffic: **+1,0%** , meaning **+2.591** tons.



Traffic Data Report

Quarterly Flows

QUARTERLY DATA

II Quarter

2023

CUMULATED DATA

I - II Quarter

2023

Key data - I - II Quarter 2023

Passengers, cargo and flights

PASSENGERS

89.303.818

▲ 29% vs 2022

≈ 0% vs 2019

CARGO

508.992

▼ -6% vs 2022

▼ -1% vs 2019

FLIGHTS

741.277

▲ 11% vs 2022

▼ -5% vs 2019

Key data - I - II Quarter 2023

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

GEOGRAPHICAL SCOPE

NATIONAL	INT. UE	INT. EXTRA-UE
31.906.104	36.992.978	20.404.736
▲ 12% vs 2022	▲ 32% vs 2022	▲ 63% vs 2022

CARRIER TYPE

LEGACY	LOW-COST
36.738.989	52.564.829
▲ 73% vs 2022	▲ 10% vs 2022

TOP 3 AIRPORTS

PASSENGERS	CARGO	FLIGHTS
Roma Fiumicino 17.819.601	Milano Malpensa 328.705	Roma Fiumicino 120.007
Milano Malpensa 11.774.025	Roma Fiumicino 78.784	Milano Malpensa 94.683
Bergamo Orio al Serio 7.648.802	Venezia Tessera 21.781	Milano Linate 53.931

Key data - I - II Quarter 2023

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

GEOGRAPHICAL SCOPE

NATIONAL	INT. UE	INT. EXTRA-UE
36%	41%	23%
▼ -6 pt. perc. vs 2022	≈ 1 pt. perc. vs 2022	▲ 5 pt. perc. vs 2022

CARRIER TYPE

LEGACY	LOW-COST
41%	59%
▲ 10 pt. perc. vs 2022	▼ -10 pt. perc. vs 2022

TOP 3 AIRPORTS

PASSENGERS	CARGO	FLIGHTS
Roma Fiumicino 20% ▲ 3 pt. perc.	Milano Malpensa 65% ▼ -5 pt. perc.	Roma Fiumicino 16% ▲ 2 pt. perc.
Milano Malpensa 13% ≈ 0 pt. perc.	Roma Fiumicino 15% ▲ 4 pt. perc.	Milano Malpensa 13% ≈ 0 pt. perc.
Bergamo Orio al Serio 9% ≈ 0 pt. perc.	Venezia Tessera 4% ≈ 0 pt. perc.	Milano Linate 7% ≈ 0 pt. perc.

Key data - I - II Quarter 2023

Comparison to same period 2022 and 2019

The nationwide air traffic data related to the period I - II Quarter have been compared to the same month of the previous year (2022) and to 2019, as pre-Pandemic benchmark. Here following the **scheduled** and **charter** traffic data related to passengers, cargo and flights.

Traffic category	2019	2022	2023	Δ% 2022	Δ% 2019	
Passengers (units)	89.405.285	69.025.158	89.303.818	▲ 29%	≈ 0%	
Cargo (tons)	515.810	539.192	508.992	▼ -6%	▼ -1%	
Flights (units)	780.823	668.510	741.277	▲ 11%	▼ -5%	

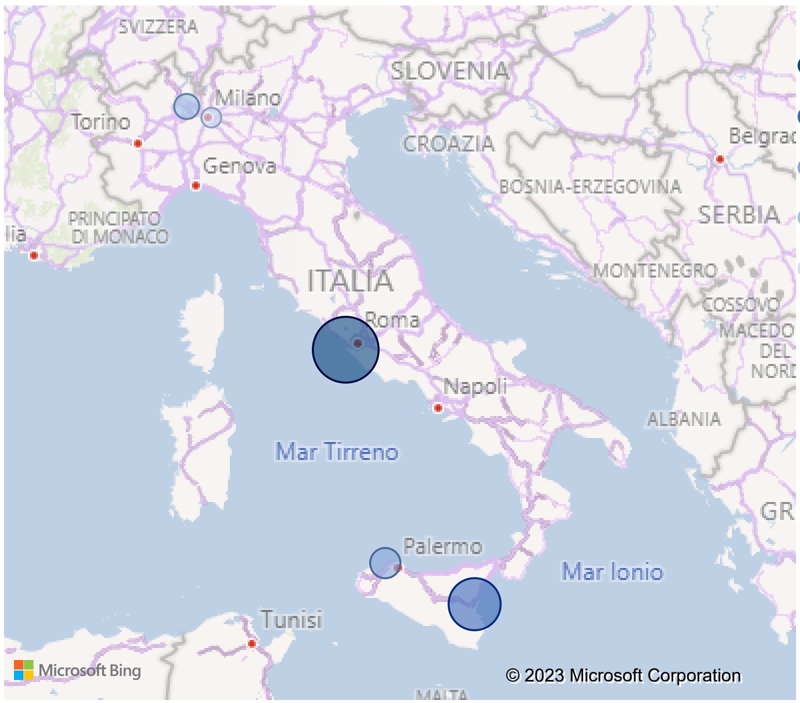
Traffic data related to **passengers** show as during the period **I - II Quarter** about **89,3 M** of persons have been moved, recording an **increase** of **+29,4%** compared to the same period of last year. Assuming 2019 as benchmark, it results that the passenger sector **has not recovered pre-Pandemic values**, with a negative trend of **-0,1%** compared to the period I - II Quarter 2019.

As far as **cargo** sector concerns, during the period **I - II Quarter** air traffic reached about **509,0 K tons** , recording a **decrease** of **-5,6%** compared to the previous period of last year. Assuming 2019 as benchmark, cargo sector **has not recovered pre-Pandemic values**, with a negative trend of **-1,3%** compared to January - I - II Quarter 2019.

Passengers - I - II Quarter 2023

National Scope - Top-5 Airports

During the period I - II Quarter, **domestic passengers** air traffic recorded 31.906.104 units, corresponding to **36%** out of the total and an increase of +12,0% compared to the same period of last year. **Top five airports** reached a traffic of **14.694.964 units**, accounting for the **46%** out of total domestic passengers traffic, with an increase of **+13,7%** compared to I - II Quarter 2022. **Roma Fiumicino** is the first airport in terms of national air traffic, with a market share of 12%, witch matches to 3.900.772 passengers. Connections Roma Fiumicino - Catania Fontanarossa represent the main route.

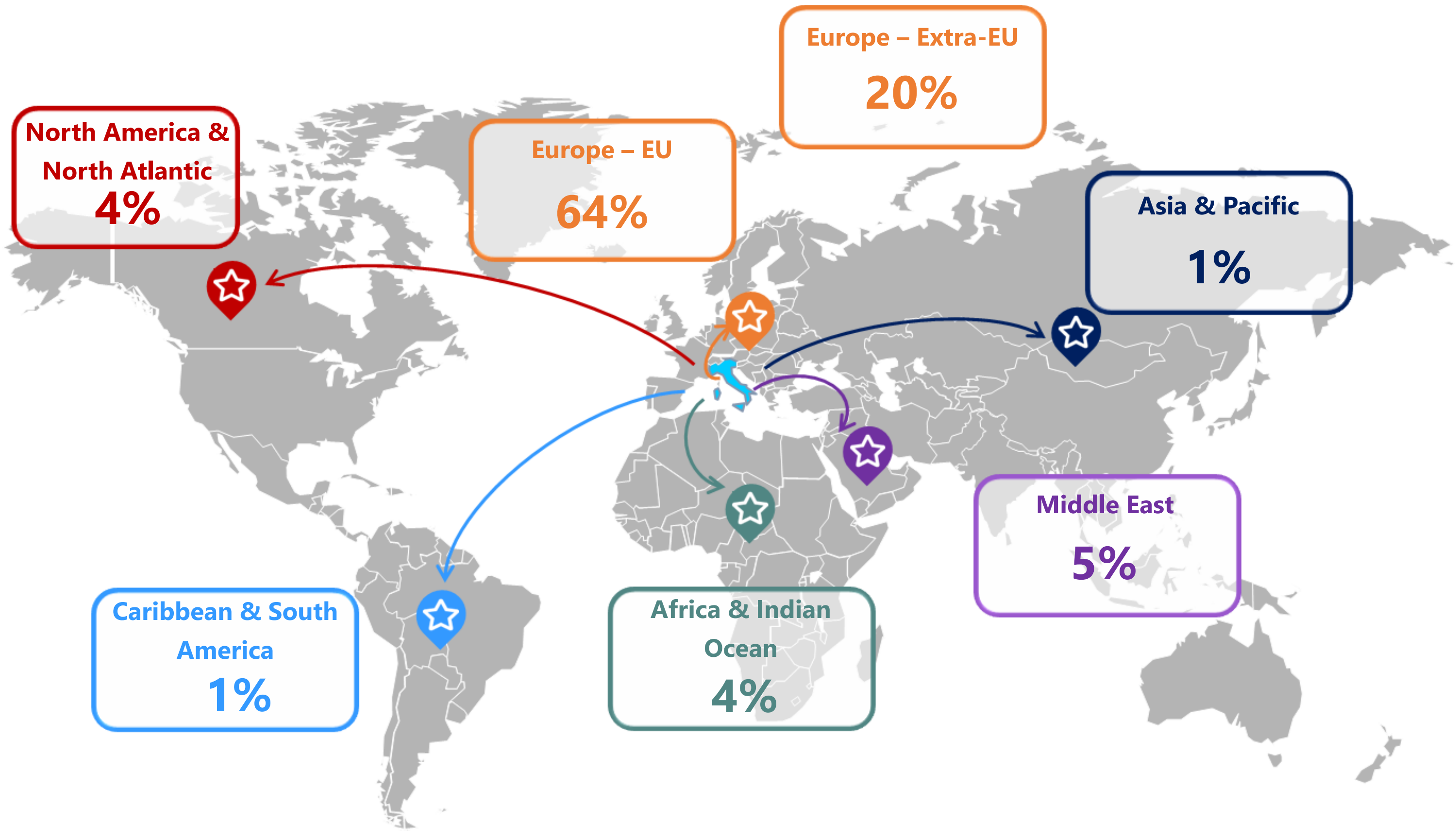


Airport	Share	Pax	Δ% vs 22
Roma Fiumicino	12,2%	3.900.772	▲ 34%
Catania Fontanarossa	10,7%	3.415.807	▲ 11%
Palermo Punta Raisi	8,3%	2.645.250	▲ 11%
Milano Malpensa	7,7%	2.460.246	▼ -8%
Milano Linate	7,1%	2.272.889	▲ 35%

Passengers - I - II Quarter 2023

International Scope - Share by geographical area

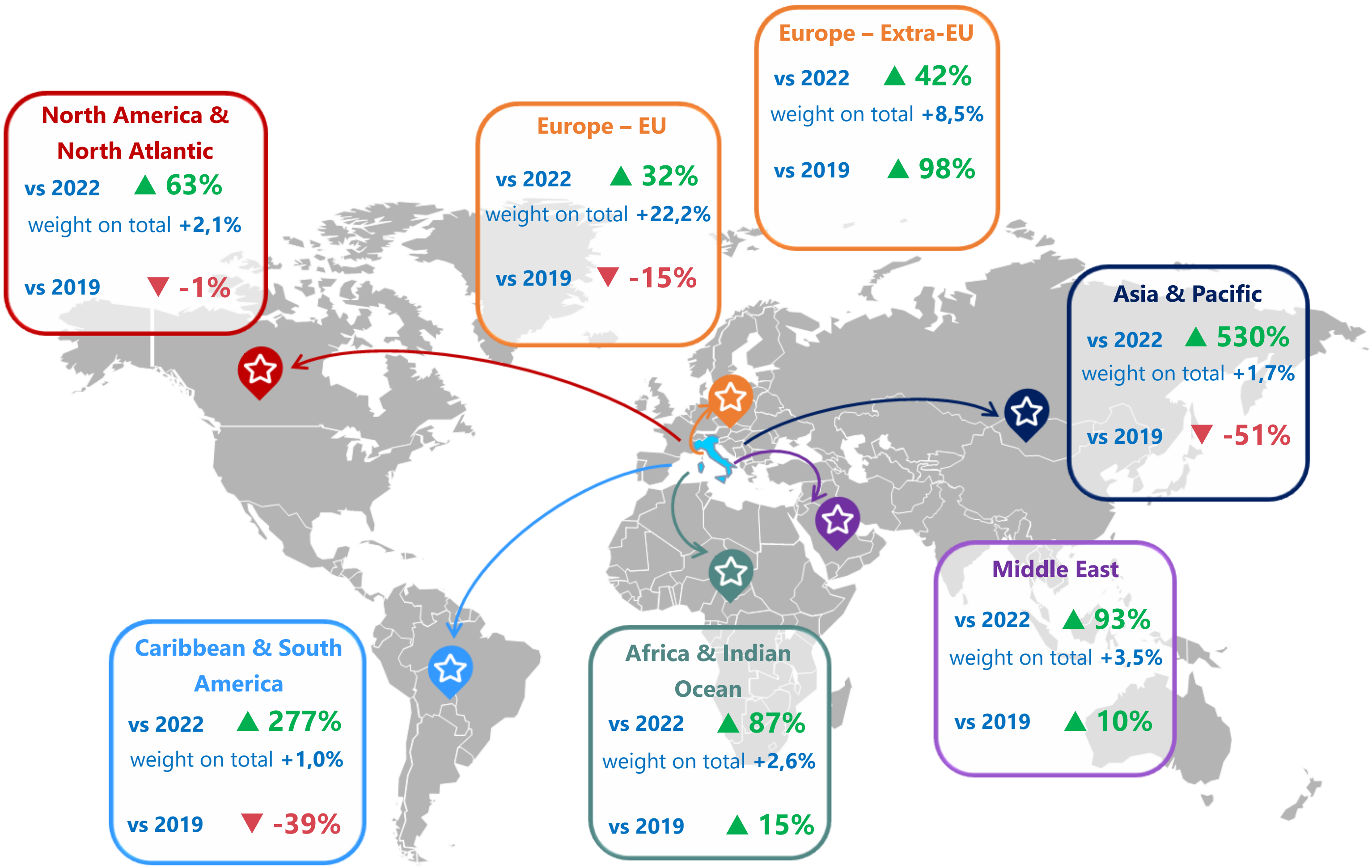
During the period I - II Quarter the **international passengers** traffic recorded **57.397.714 units**, corresponding to **64%** out of total. As compared to the same period of the previous year, there is an **increase** of **+41,5%** . Data are processed excluding national traffic, therefore the traffic share with European Union does not include domestic one (31.906.104 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 - II Quarter 2023

International Scope - Change in traffic by geographical area

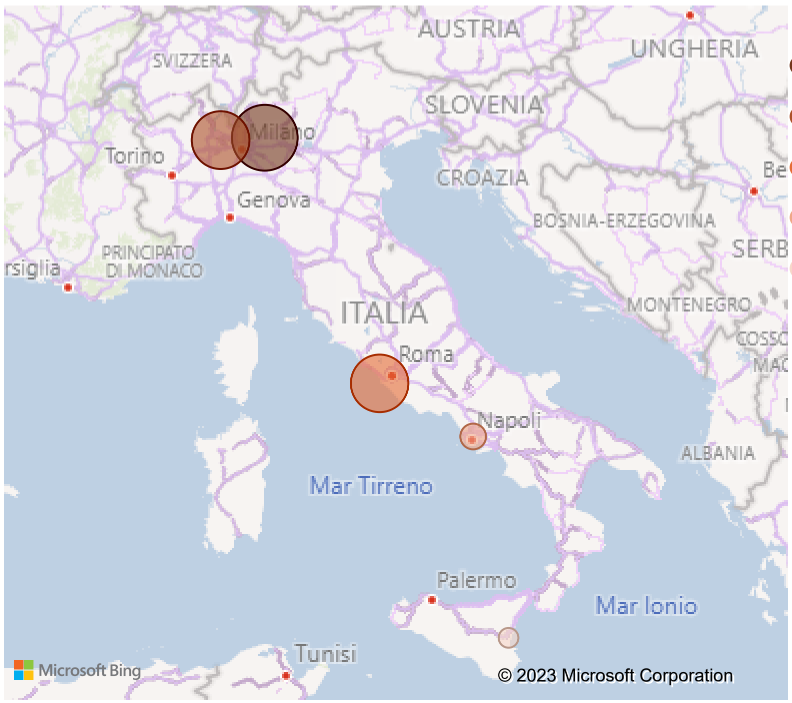
Data elaborated by geographical area show how, in **absolute** terms, the highest growth rate has been recorded in **Asia & Pacific**: **+529,6%** area, corresponding to an increase of total international traffic by +1,7%, meaning **+678.934** passengers. In **relative** terms, instead, the **Europe - EU** has been the geographic area that had the gratest impact on total traffic: **+22,2%** , meaning **+8.994.572** passengers.



Passengers - I - II Quarter 2023

Low-cost Carriers

During the period I - II Quarter the **low-cost** passengers air traffic recorded 52.564.829 units, corresponding to **59%** out of the total and an increase of **+10,1%** compared to the same period of the previous year. Furthermore, the comparision between low-cost and legacy segments shows that the **share** of low-cost has decreased by 10 percentage points . **Top five airports** reached a traffic of **28.413.526 units**, accounting for the **54%** out of total low-cost passengers traffic, with an increase of +15,5% compared to I - II Quarter 2022. **Bergamo Orio al Serio** is the first airport in terms of national air traffic, with a market share of 14%, which matches to 7.191.531 passengers. Connections Milano Malpensa - Catania Fontanarossa represent the main route.

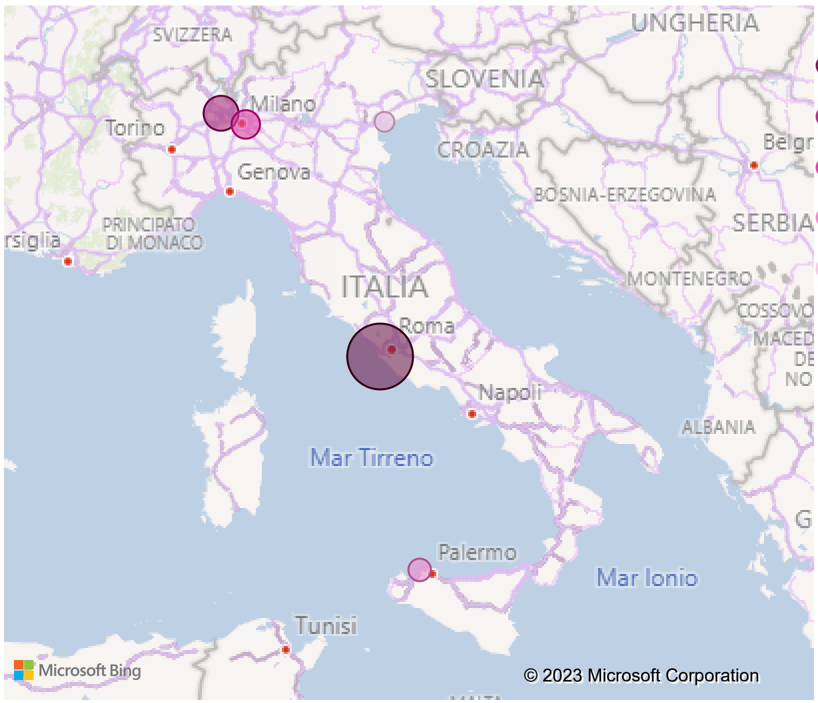


Airport	Share	Pax	Δ% vs 22
Bergamo Orio al Serio	13,7%	7.191.531	▲ 26%
Milano Malpensa	12,6%	6.600.708	▲ 11%
Roma Fiumicino	12,5%	6.584.878	▲ 20%
Napoli Capodichino	8,1%	4.236.983	▲ 10%
Catania Fontanarossa	7,2%	3.799.426	▲ 4%

Passengers - I - II Quarter 2023

Legacy Carriers

During the period I - II Quarter the **legacy** passengers air traffic recorded 36.738.989 units, corresponding to **41%** out of the total and an increase of **+72,8%** 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 increased by 10 percentage points . **Top five airports** reached a traffic of **25.292.369 units**, accounting for the **69%** out of total legacy passengers traffic, with an increase of +72,3% compared to I - II Quarter 2022. **Roma Fiumicino** is the first airport in terms of legacy air traffic, with a market share of 31%, which matches to 11.234.723 passengers. Connections Roma Fiumicino - Madrid Barajas represent the main route.

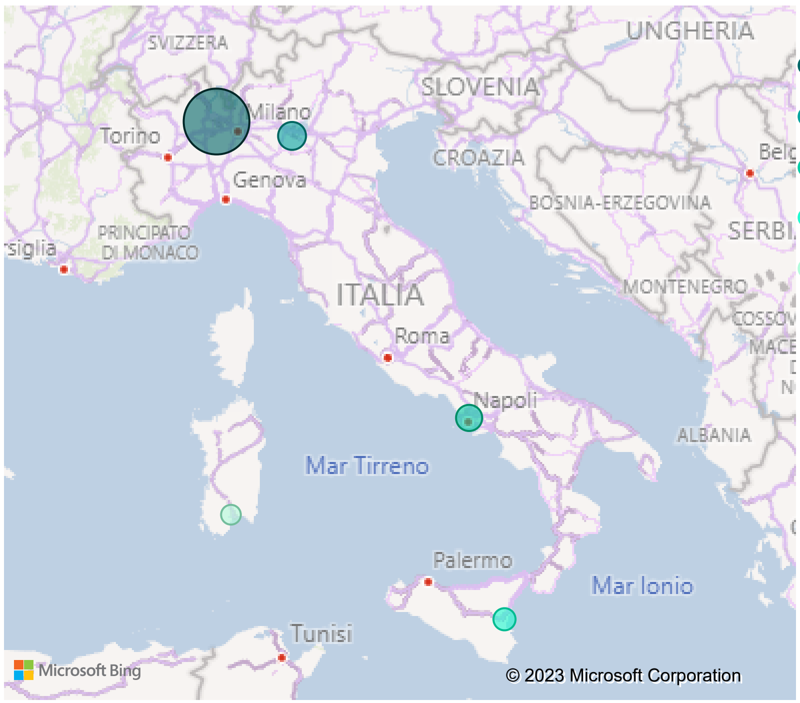


Airport	Share	Pax	Δ% vs 22
Roma Fiumicino	30,6%	11.234.723	▲ 84%
Milano Malpensa	14,1%	5.173.317	▲ 72%
Milano Linate	10,7%	3.921.616	▲ 64%
Palermo Punta Raisi	7,5%	2.759.479	▲ 66%
Venezia Tessera	6,0%	2.203.234	▲ 46%

Cargo - I - II Quarter 2023

National Scope - Top-5 Airports

During the period I - II Quarter, **domestic cargo** air traffic recorded 46.709 tons, corresponding to **9%** out of the total and a decrease of -6,1% compared to the same period of last year. **Top five airports** reached a traffic of **32.325 tons**, accounting for the **69%** out of total domestic cargo traffic, with a decrease of **-3,9%** compared to I - II Quarter 2022. **Milano Malpensa** is the first airport in terms of domestic air traffic, with a market share of 33%, witch matches to 15.387 tons. Connections Napoli Capodichino - Milano Malpensa represent the main route.

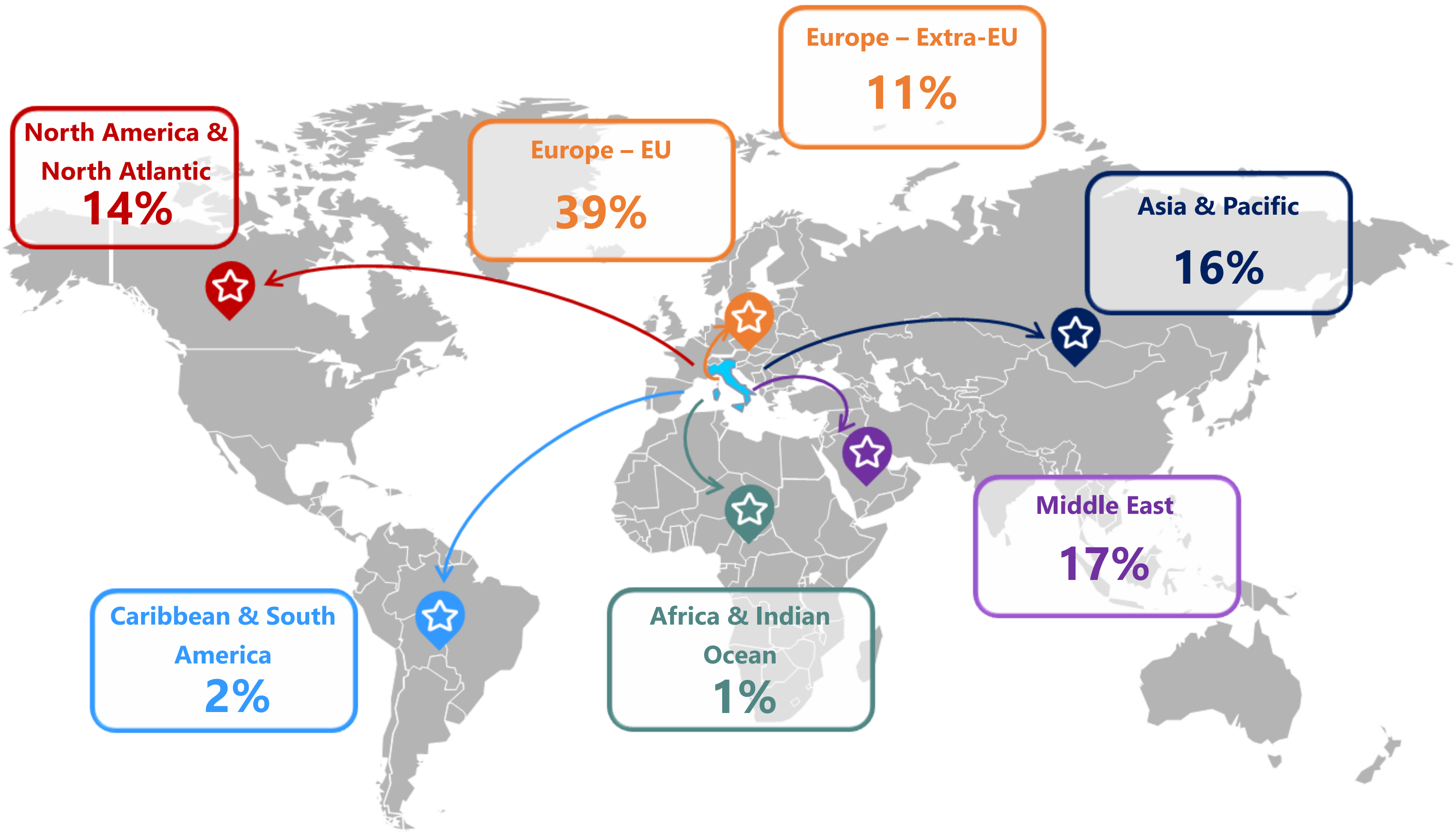


Airport	Share	Cargo	Δ% vs 22
Milano Malpensa	32,9%	15.387	▲ 2%
Brescia Montichiari	11,3%	5.281	▼ -11%
Napoli Capodichino	10,3%	4.813	▼ -9%
Catania Fontanarossa	8,0%	3.739	▼ -10%
Cagliari Elmas	6,7%	3.106	▼ -1%

Cargo - I - II Quarter 2023

International Scope - Share by geographical area

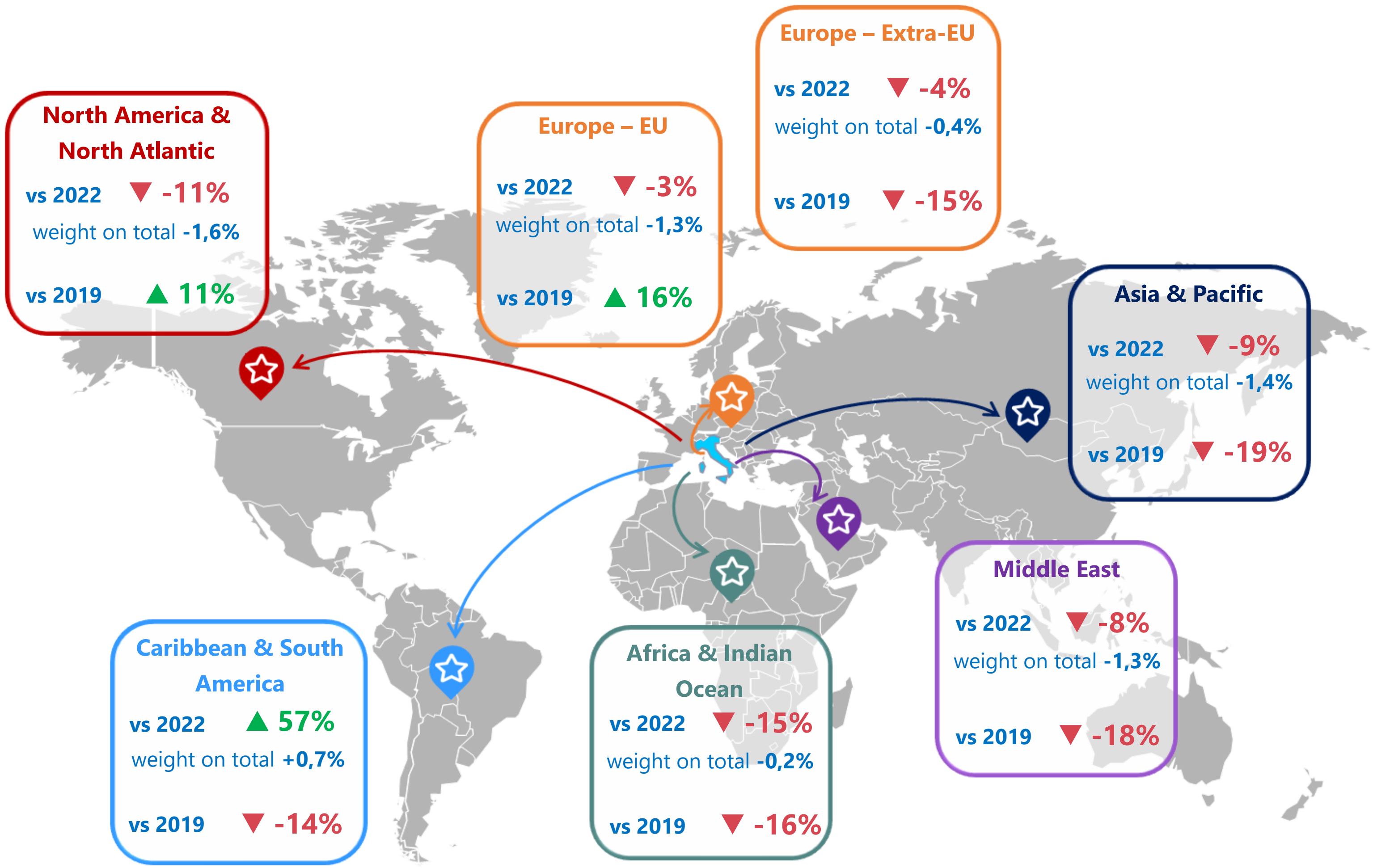
During the period I - II Quarter the **international cargo** air traffic recorded **462.283 tons**, corresponding to **91%** out of total. As compared to the same period of the previous year, there is a **decrease** of **-5,6%** . Data are processed excluding national traffic, therefore the traffic share with European Union does not include domestic one (46.709 tons). The **Europe - EU** is the geographical area to which the most traffic is observed, with **Germany** being the first country and **Milano Malpensa - Leipzig-Halle** the main route.



Cargo - I - II Quarter 2023

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 **Caribbean & South America**: **+56,9%** area, corresponding to an increase of total international traffic by +0,7%, meaning **+3.260** tons. Also in **relative** terms, **Caribbean & South America** has been the geographic area that had the greatest impact on total traffic: **+0,7%** .



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
Russian Federation
Serbia
Switzerland
Turkey
United Kingdom

Caribbean & South America
Antigua and Barbuda
Argentina
Bahamas
Barbados
Brazil
Colombia
Cuba
Dominican Republic
Grenada
Guadeloupe
Jamaica
Martinique
Mexico
Puerto Rico
Saint Vincent and the Grenadines
Sint Maarten
Turks and Caicos Islands
Uruguay
Venezuela

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

Africa & Indian Ocean
Algeria
Angola
Benin
Botswana
Cabo Verde
Chad
Congo
Côte d'Ivoire
Djibouti
Egypt
Equatorial Guinea
Ethiopia
Guinea
Guinea-Bissau
Kenya
Libya
Madagascar
Mali
Mauritius
Morocco
Namibia
Niger
Nigeria
Réunion
Rwanda
Senegal
Seychelles
Sierra Leone
South Africa
Tanzania, United Republic of
Togo
Tunisia

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Ente Nazionale per l'Aviazione Civile
Italian Civil Aviation Authority

Edited by the Economics Studies and Analysis Departement

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

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