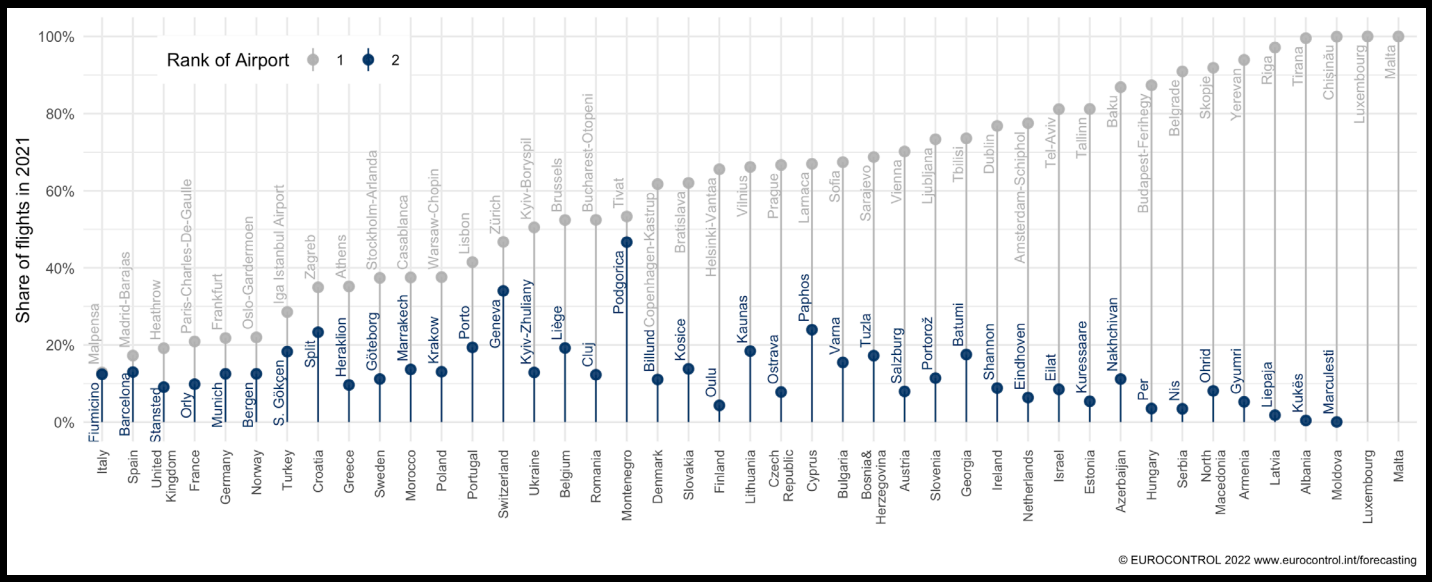
EUROCONTROL Data Snapshot

Second-largest airports very rarely exceed 20% share of flights, but they provide a window onto a country's aviation market.

1 February 2022



The busiest airports of each European country vary widely, from those with 100% of the flights (Luxembourg, Malta) to those with just 15-20% share (Milan/Malpensa, Madrid/Barajas, London/Heathrow). Among the second-busiest airports, there is much less variety, with very few exceeding 20% share of flights. Many second-rank airports are rarely in the spotlight, but they're worth a closer look, because that tells us something about aviation in the country.

The graph shows data for 2021, and COVID-19 has certainly had an effect. In 2019 Milan/Malpensa was a close second to Rome/Fiumicino (graph on next page), but that is reversed in 2021; the same is true for Tivat and Podgorica. Elsewhere, a number of the 2021 second airports shown on the graph ranked lower in 2019: Stansted (Ryanair's relatively strong recovery means it displaces Gatwick), Liege (strong cargo, so it overtakes Charleroi), Shannon (steady business aviation and cargo helping it overtake Cork in 2021), Kuressaare (a steady scheduled, PSO service taking it past Tartu), Varna (overtaking Burgas due to the latter's weak recovery of Summer charter), and Per (with a small but relatively strong business aviation activity leaving it ahead of Debrecen, where the scheduled services have yet to recover to 2019 levels).

Even in normal years, very few second airports exceed 20% of share. When it does occur, tourist flights taking holidaymakers close to their destination is the main driver: hence Split, Paphos and (in 2019) Tivat and Marrakech. Geneva is the only other case; tourism is part of the explanation here, but also the economic balance – with the GDP of the Lake Geneva region not far from that of the Zurich region.

In the graph, the left-hand seven countries are dispersed markets where even the largest airport has a relatively small share of the total (weighted by flights here – the picture in passengers might be different). But it's interesting that for five of these countries, the largest airport still has a 5-10 percentage point bigger share than the next largest. From Greece through to Portugal that dominance opens up to a 20 percentage point advantage, even where the main airport has less than 50% of flights: tourism or slow ground (or sea) travel allow a variety of airports to flourish, but the centre is strong.

For the remaining half of countries on the right of the graph, the main airport has two thirds or more of the flights. That leaves relatively little space for others, which are left to cater largely for the local tourist market, business aviation or flight schools – or a mix of these: Ohrid, Salzburg, Eilat and Portoroz are examples of this.

Technical Bits: 'Flights' here means flights under 'instrument flight rules', ie most flights controlled by civil air traffic controllers. More airport and market segment data is available in the EUROCONTROL/STATFOR dashboard and in the aviation intelligence dashboard. PSO – Public service obligation. GDP – Gross domestic product.

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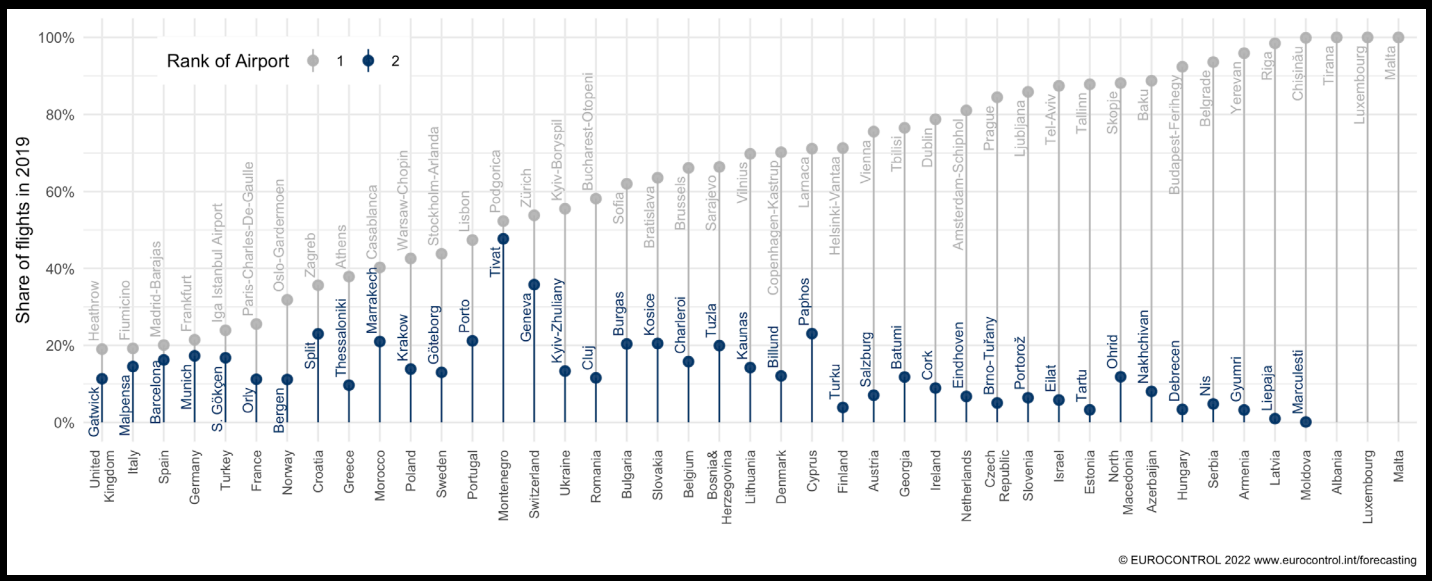
Top two airports in 2019



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